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by George Bailey
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by George Bailey

Education is ... banging around until you've caught on.

—Robert Frost

Intelligence
that you can use
on communications
media & technologies

Sometimes the most compelling research findings spring not from a single study, but from observations that are consistent across studies, time and time again. Since 1988 George Bailey has moderated nearly 200 focus groups with public radio listeners — most of them public radio news listeners. We've also surveyed listeners and members about programming on more than two dozen occasions. The research questions varied, and our findings remain proprietary to clients, yet there are certain truths that appear consistently from study to study.

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For this article I've asked Dr. Bailey to synthesize what we've found about “NPR News Loyalists.” Who are they? What is their world view? And what does this mean for programmers?

—David Giovannoni

In the world of physical science, when results have been consistent over time and theoretical debate has settled down, scholars are willing to recognize a natural law. In public radio research the subjects are human, more or less, so we will not claim to have discovered laws of human behavior. Yet within the limited universe of public radio in the 1990's, we are confident of certain truths about “NPR” News Loyalists.

You know these people. Recruited for a focus group, “NPR” News Loyalists walk into the reception area carrying the book they're reading. It's by Noam Chomsky. As the others arrive a few recognize each other — from the school board meeting, the arts festival, the Unitarian church.

It hasn't always been this way. To understand where this thinking may take us, we must first understand where we've been.

Two Critical Definitions

When we talk about “NPR” News Loyalists, we are using the term “NPR” as it is used by listeners.

Anyone who has witnessed focus groups can tell you that few public radio listeners really know or care about distinctions between National Public Radio or Public Radio International. Mainly

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because it was there first, the term “NPR” is commonly understood to mean the in depth, intelligent and global news on public radio. When listeners tell their colleagues about something great they heard on “NPR,” they may be referring to *MARKETPLACE* as well as *MORNING EDITION*, *MONITOR* as well as *ATC*, or even a good piece by a local reporter.

Of course, there’s a great deal of cume sharing among NPR and PRI programs. The listeners, their qualities and loyalties are basically the same.

We use the term “loyalist” to mean a subset of public radio news listeners.

During any given week, the big programs like *ATC*, *MARKETPLACE*, *MORNING EDITION*, *FRESH AIR* and *MONITOR* together are heard by more than 10 million listeners. We define news loyalists as those who use the news programs frequently, nearly every day rather than once a week. Their clock radio goes off to “NPR.” The first button on their car radio is set on “NPR.”

Since they are professionals — working with their brains — they may not use radio during midday, but they are loyal listeners to “NPR” during the tentpole hours.

Because they tune in frequently, news loyalists dominate a station’s average audience during the network programs, although they may comprise less than a third of the program cume. Think about an announcement in rotation, for example a positioning statement broadcast every half hour. It would reach nearly all *MORNING EDITION* listeners at least once but would achieve high frequency among news loyalists.

Okay, why are they so special?

Loyal listening to “NPR” news is a function of generational cohort and extremely high education. When we recruit samples on the basis of *unaided favorite station for news*, our typical respondent graduated from high school in 1969 and continued formal education through graduate school. Today that respondent is 43 years old, employed in a highly professional occupation and still interested in learning.

Bob Cronkite

Generational cohorts are strong predictors of media preference. Today’s typical viewer of CBS TV news is beyond retirement age, as you can see by the spots for Fixadent and Depends. The youngest correspondent on *SIXTY MINUTES* is about 65 years old. That’s because the cohort we now call Modern Maturity became loyal to Walter Cronkite decades ago.

What we do *not* know is whether the generational appeal of “NPR” news will follow the experience of CBS TV news. Will the news loyalists age to retirement along with Bob Edwards?

Implication: Cohort effects are so powerful that they can be addressed only by heavy-duty strategic action. ESPN has invested millions in ESPN-2, a distinct and contrasting sports channel designed for the next generation.

Alternatively, will today’s 20-somethings eventually mature into an appreciation of “NPR” news?

Implication: This has been the experience of public radio to date. As the audience has grown through the years, the median age of NPR news listeners has remained almost constant. Public broadcasters should bear this in mind as *we* age.

Bookworms

“NPR” news loyalists are highly educated because they enjoy learning. They didn’t just attend college, they loved college. Many of them went on to graduate school.

Now they read a lot of serious books — a book store is the most perfect match for underwriting. In focus groups they say that “NPR” news programming continues their advanced education.

Implication: Dumbing down the intelligence of public radio news programs — for example, by doing shorter stories or adding more sports — might bring in more normal radio listeners. However, that strategy would turn off our most loyal users.

WUWM in Milwaukee is a news station that rolls over nearly every news program from NPR and PRI, including recycling of *FRESH AIR* to the weekend.

Last fall we recruited a sample of primary and secondary WUWM news listeners for focus groups. Here's the education and occupation composition of two groups:

Women

Some College	Insurance service
College	RN
Advanced Degree	Art teacher
College	Elementary teacher
Advanced Degree	School teacher
College	Homemaker
Advanced Degree	Career counseling
College	Paralegal contracts
College	Marketing
College	Vascular nurse
College	Postal clerk
College	Physical therapist

Men

Advanced Degree	Architect
Advanced Degree	Marketing manager
Some College	Computer consultant
Advanced Degree	Systems engineer
College	School engineer
Advanced Degree	Teacher
College	Woodworker
Some College	Sales marketing
Advanced Degree	Secondary teacher
College	Biomedical research
Advanced Degree	Attorney CPA
Advanced Degree	Academic librarian

It's important to understand that these people were recruited on the basis of their use of public radio news. They were not screened or chosen based on their education. These two characteristics simply go hand in hand.

Forget AM Newsradio

We find that AM newsradio provides little competition for listening by “NPR” news loyalists. This may appear to be circular; after all, we've defined this segment of listeners in terms of loyal listening to **public** radio. But there are formatic implications.

News loyalists tune briefly to commercial radio for traffic, weather, school closings and local crisis coverage, but they listen far longer to the public station because of its **unique** service — in depth, intelligent, global news. When asked directly whether they think the public station should add services like traffic, they observe that they already have a button set to AM which provides such services on demand. Also, they fear that more traffic and other local services would mean less “NPR” news.

Implication: In their Arbitron data, program directors see cross over listening with the AM news station and may conclude that we ought to become “full service” radio. The downside of that strategy could be lowering our value to the most loyal news listeners.

Markets Do Not Make A Difference

Some markets like Madison, Wisconsin, or Washington, DC, have a much greater concentration of highly educated, societally conscious, professionally employed 35-54 year olds. But in any market, if you recruit on the basis of **unaided primary listening** to NPR or PRI news, you will see the same kind of people walk in the door.

The appeal that draws them to “NPR” news transcends geography. We've never found any regional differences in their preference for news style or content.

Implication: News loyalists may feel somewhat out of place in their own market if surrounded by people who reject their world view. They especially value public radio as a psychic transport to a different milieu.

In 1993 we were doing news testing in San Antonio. KSTX-FM broadcasts nothing but network news programs, clearing everything from both networks.

In the Arbitron book for San Antonio there are five Spanish stations and four playing country music. We recruited KSTX listeners, and after watching four groups general manager Joe Gwathmey boomed out his observation: “You know, none of those people spoke with a Texas accent.”

“NPR” News Loyalists Send Money

In focus groups, news loyalists say that daily programs are important in their lives. They would really miss “NPR” if it went away. Personal importance is the underlying dimension separating loyal news listeners from others who tune in less frequently.

In our membership research we consistently find that news loyalists are much more likely to support public radio than any other segment of the audience. A greater percentage contribute than classical or jazz listeners, and they give more money more often. We think this is a function of their personality or VALS type. They cannot avoid getting involved in causes, including public radio.

Implication: Although the cost of network news programs is more per hour than, say, local classical music, the financial return to the station may be favorable. If you’re the dominant “NPR” news sta-

In 1988 we hired FMR Associates to do the first round of music testing for the Denver Project. FMR has a road crew traveling the country. They set up the EARS system and conduct listening sessions for hundreds of commercial radio stations. When we booked a Denver conference center and recruited a sample of KCFR listeners, the FMR team issued their standard directions: smokers please take chairs on the left side of the room, non-smokers over on the right.

By the time that half of our respondents had arrived, the right side of the room was filled and there was one guy sitting on the left.

tion in town, you probably have the greatest potential for membership income.

Loyalists Can Be Disappointed

We’ve done several news tests, rather formal A/B comparisons of network stories vs packages produced by stations. News loyalists want local public radio news to match the network quality of news judgment, writing, presentation and depth. It’s not easy for local reporters to achieve those standards, especially if they have to keep scrambling to fill a lot of local time.

In the recent buzz about local news, one point has not gotten across. “NPR” news loyalists do *not* use the term “local news” with reference to its origination. They refer to its conceptualization. Highly educated listeners don’t think that anything can be approached as merely local, since we are all connected to our history, society, economy, culture or environment.

Carol Hills and David Messerschmidt of *Northwest Journal* recently addressed this point most succinctly:

When local news maintains national standards, listeners don't distinguish between the sources. It's all from "NPR." But when the local news falls short, the distinction in quality becomes glaring, to the detriment of the local station's reputation.

Stories must be written for a national audience. This is something that every newsroom should practice — even for their local listeners.

— CURRENT 12/21/94

Implication: News directors can improve service to listeners by demanding that reporters produce each local story in depth, as if on assignment for a network news program. Yes, that would mean fewer stories covered per week by the local newsroom, quality over quantity.

George Bailey, PhD, is president of Walrus Research. The Corporation for Public Broadcasting funded this report. Opinions expressed are the author's and do not necessarily reflect opinions or policies of the corporation.