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Programming and Audience Trends

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PROGRAMMING & AUDIENCE TRENDS

This report summarizes key findings of the *Public Radio Programming Strategies* report, an extensive study of 570 public radio stations' programming and audience goals. Published in 1992, the study examines current programming, audience targets, and stations' plans for 1995. The report groups stations that aspire to serve similar audiences with similar programming. It shows how the programming and audience service aspirations of stations unite in ways that cut across geography, network affiliation, or funding.

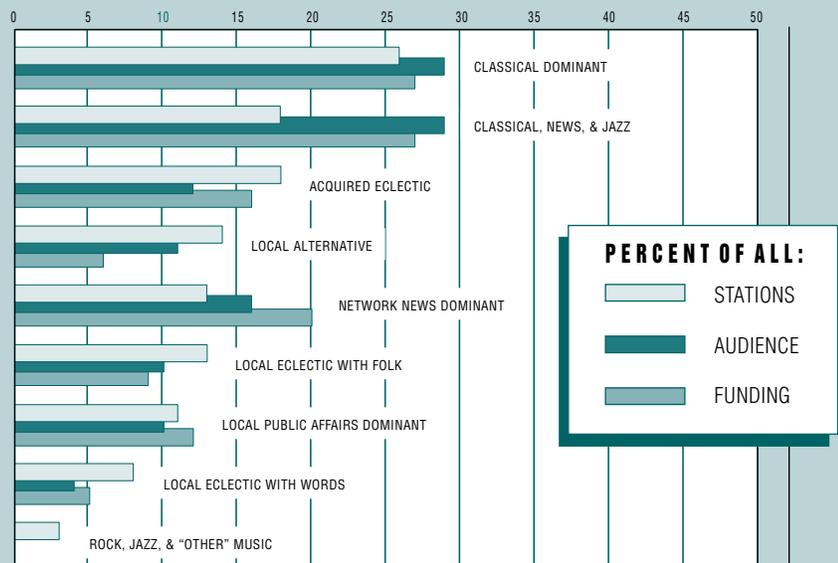
Making Choices: Format Focusing

Today, public radio collectively serves a larger and more diverse audience than ever before. Most listeners can now tune in multiple public stations—stations that, more and more, vary in their programming mix and reach a different mix of listeners.

The diversification of service through station differentiation is a significant and accelerating trend for public radio. This consolidation of programming at a station—doing fewer formats and doing them longer—is called *format focusing*.

- Stations will continue their long-running movement toward programming consolidation. In 1995, the system will serve more people and more kinds of people. Individual stations, however, will offer fewer formats than they do today.

- The formats stations retain will constitute a larger portion of their program schedules. Fewer stations will offer classical, jazz, folk, rock, and "other" music; the stations of-



COMPARING PROGRAMMING COHORTS: NUMBER OF STATIONS, AUDIENCE AND FINANCIAL SUPPORT

THIS GRAPH COMPARES CURRENT PROGRAMMING COHORTS BY THREE MEASURES:

- PERCENT OF STATIONS** (THE PERCENT OF PUBLIC RADIO STATIONS THAT ARE MEMBERS OF THE COHORT). THE *CLASSICAL DOMINANT* COHORT IS THE LARGEST; THE *ROCK, JAZZ, & "OTHER" MUSIC DOMINANT* COHORT IS THE SMALLEST.
- AUDIENCE** (THE PERCENT OF PUBLIC RADIO'S NATIONAL AVERAGE QUARTER-HOUR AUDIENCE THAT LISTENS TO STATIONS IN THE COHORT). THE *CLASSICAL DOMINANT* AND *CLASSICAL, NEWS, & JAZZ* COHORTS SERVE THE SAME NUMBER OF LISTENERS; HOWEVER, THE LATTER COHORT DOES SO WITH FAR FEWER STATIONS, AND WITH GREATER NONFEDERAL FINANCIAL SUPPORT PER STATION.
- FINANCIAL SUPPORT** (THE PERCENT OF ALL NONFEDERAL FINANCIAL SUPPORT REPORTED BY ALL PUBLIC RADIO STATIONS).

fering them will commit more time to each. Fewer hours will remain for programming on the fringe of a station's primary focus.

- Programming diversity will be provided less within a single station's schedule, and more among the schedules of multiple public radio stations serving the same community.

Sorting Out Stations' Programming

Many stations still concentrate on the familiar public radio programming areas of classical music and news. Increasingly, however, significant numbers of stations feature other programming combinations—enough to comprise nine overlapping programming-based "cohorts," (groups of stations with similar programming profiles).

- Two-in-ten public radio stations are **Information Dominant**. As a group they fill nearly 40 percent of their schedules with news, events, public affairs, and/or call-in programming—nearly twice the system average. Music fills half of the prime time and 80 percent of the non-prime schedules on these stations. The two Information Dominant cohorts are *Network News Dominant* and *Local Public Affairs Dominant*.

- Four-in-ten public radio stations are **Music Dominant**. On average, these stations devote 83% of their schedules to music. More than three-quarters broadcast some news and events and/or public affairs and

Programming diversity will be provided less within a single station's schedule, and more among the schedules of multiple public radio stations serving the same community.

Five appeal-based cohorts are defined by how stations see themselves appealing to listeners of various ages, races, levels of education, and incomes.

call-in. The three Music Dominant cohorts are: *Classical Dominant*; *Rock, Jazz, & "Other" Music Dominant*; and *Local Alternative*.

■ Five-in-ten public stations are **Mixed Format** stations. The four **Mixed Format** categories are: *Classical, News, & Jazz*; *Acquired Eclectic*; *Local Eclectic With Folk*; and *Local Eclectic With Words*.

■ *Acquired Eclectic* and *Network News Dominant* stations acquire (rather than produce locally) the majority of the programming they present throughout their schedules. *Classical Dominant* stations, primarily local during the day, use more acquired programming at night. The local cohorts—*Local Alternative*, *Local Eclectic With Folk*, *Local Public Affairs Dominant*, and *Local Eclectic With Words*—rely the most on locally produced programming around the clock.

Sorting Out Stations' Audiences

Stations also vary in how they see themselves appealing to listeners of various ages, races, levels of education, and incomes. For many stations, their sense of who their listeners are is strongly influenced by the Arbitron data they receive on a regular basis. Some stations, however, have little or no audience information to take into consideration.

Most stations believe that their programming appeals to many kinds of listeners. Their perception as to the breadth of their audience, however, is more optimistic than the data would support. At the same time, stations do identify distinctive profiles in their service—more appeal to some kinds of listeners and less to others.

The key is *direction of service*, or *strategic thrust*—defining five appeal-based cohorts.

■ Stations in the *Well-Educated Appeal* cohort believe their appeal is *most* directed to white listeners who have completed college or graduate school and *least* directed to persons under 24 years of age.

■ *Older Appeal* stations believe their appeal is *most* directed to persons over 45. These stations do not consider themselves appealing to minorities or to persons under 25.

■ Stations in the *Mid-Age Appeal* cohort see themselves serving a wide range of college-educated white listeners between 25 and 64 years-of-age—echoing the perceived appeal “norms” established by public stations in general.

■ *Multiple Appeal* stations believe they appeal most strongly to college-educated white listeners between the ages of 25 and 64. But unlike other stations, *Multiple Appeal* stations believe they appeal to *most types of people*—including minorities. In this sense they share an undiscriminating, non-exclusive attitude.

■ Stations in the *Younger Appeal* cohort see themselves appealing to a wide range of persons under 65 years of age. But compared to other public stations, their perceived appeal is directed *primarily* to persons between the ages of 12 and 34, and somewhat more than average to minority listeners.

NUMBER OF STATIONS					
	WELL EDUC.	OLDER	MID-AGE	MULTIPLE	YOUNGER
NETWORK NEWS DOMINANT	18		23		
LOCAL PUBLIC AFFAIRS DOMINANT					
CLASSICAL DOMINANT	40	54	19	22	24
ROCK, JAZZ, & "OTHER" MUSIC DOMINANT					
LOCAL ALTERNATIVE			25	20	27
CLASSICAL, NEWS, & JAZZ	33	31	19		
ACQUIRED ECLECTIC	38	25		20	
LOCAL ECLECTIC WITH FOLK			20		
LOCAL ECLECTIC WITH WORDS				20	

NUMBERS ARE DISPLAYED FOR COHORTS WITH MORE THAN 17 STATIONS—THE AVERAGE ACROSS ALL STRATEGIC COHORTS. COHORTS WITH MORE THAN TWICE THE AVERAGE ARE HIGHLIGHTED.

Combining Programming and Appeal: Strategic Cohorts

Each point of intersection between a programming and an appeal cohort represents a unique audience-service strategy—a particular programming line-up serving a particular kind of audience. These points of intersection—45 in all—are called *strategic cohorts*.

Program producers, funders, and others can use this framework to assess the prospects for a wide range of programming projects, plus related activities such as research or training. The collective audience and/or financial resources of a few strategic cohorts gives them the capacity to take on almost any endeavor they choose. In other cases, national programs or other projects may be feasible only if one can enlist participation from several strategic cohorts.

% OF ALL FINANCIAL SUPPORT

	WELL EDUC.	OLDER	MID-AGE	MULTIPLE	YOUNGER
NETWORK NEWS DOMINANT	5.3	4.2	8.4		
LOCAL PUBLIC AFFAIRS DOMINANT	3.9		3.8		
CLASSICAL DOMINANT	10.5	9.5	4.4	3.1	
ROCK, JAZZ, & "OTHER" MUSIC DOMINANT					
LOCAL ALTERNATIVE			3.8		
CLASSICAL, NEWS, & JAZZ	6.6	8.2	7.0	7.5	
ACQUIRED ECLECTIC	6.4	4.2	3.2		
LOCAL ECLECTIC WITH FOLK					
LOCAL ECLECTIC WITH WORDS					

PERCENTAGES ARE DISPLAYED FOR COHORTS WITH A TOTAL OF MORE THAN \$6.9 MILLION IN NFFS. THIS IS 3.0 PERCENT OF THE NATIONAL TOTAL—THE AVERAGE ACROSS ALL STRATEGIC COHORTS. COHORTS WITH MORE THAN TWICE THIS AVERAGE ARE HIGHLIGHTED.

% OF NATIONAL AUDIENCE

	WELL EDUC.	OLDER	MID-AGE	MULTIPLE	YOUNGER
NETWORK NEWS DOMINANT	5.7		7.3		
LOCAL PUBLIC AFFAIRS DOMINANT	3.3		4.5		
CLASSICAL DOMINANT	6.9	12.8	6.1	4.0	
ROCK, JAZZ, & "OTHER" MUSIC DOMINANT					
LOCAL ALTERNATIVE			6.1		3.2
CLASSICAL, NEWS, & JAZZ	9.4	9.3	6.8	9.1	
ACQUIRED ECLECTIC	6.0	3.2			
LOCAL ECLECTIC WITH FOLK			4.8		
LOCAL ECLECTIC WITH WORDS					

PERCENTAGES ARE DISPLAYED FOR COHORTS WITH A TOTAL OF 27,000 AQH LISTENERS OR MORE. THIS IS 3.2 PERCENT OF THE NATIONAL AQH AUDIENCE—THE AVERAGE ACROSS ALL STRATEGIC COHORTS. COHORTS WITH MORE THAN TWICE THIS AVERAGE ARE HIGHLIGHTED.

The PUBLIC RADIO PROGRAMMING STRATEGIES report and database allow individuals to identify subsets of stations with a shared programming focus and to ascertain their corresponding attributes, including financial resources, audience, market size, and interconnection status.

Directions of Change

By comparing stations' current programming with their projected schedules for 1995, PROGRAMMING STRATEGIES predicts several broad directions of change.

- While there will be more stations that collectively serve more kinds of people, individual stations will be more focused in their programming efforts and will devote more time to fewer formats.

- Stations in almost all programming cohorts plan to present more information programming. One emerging programming cohort is a *News and Public Affairs Dominant* group—a more intense variation of current information-oriented cohorts.

- Stations plan to maintain the current balance between local and acquired programming, which tilts about 60/40 in favor of local programming. Over the next few years, in anticipation of longer broadcast schedules, stations say they will add an average of some two hours per week of acquired material.

- Programming cohorts will realign as the system moves toward more stations, greater diversity and differentiation of service. Specific predictions include:

The *Classical, News & Jazz* cohort will disperse as stations focus their schedules on particular formats within this mix.

A powerful *News & Public Affairs Dominant* cohort will emerge: 17 percent of these stations will be in the top 5 markets, 40 percent in the top 25.

A new *Jazz Dominant* cohort will pull stations from a wide range of current cohorts as they add jazz and trim other material.

The study also compared stations' perceptions of current listener appeal with their expectations of whom they will serve in the future.

- Stations now at the extremes of the age continuum—those serving very young and very old listeners—would like to migrate toward a more middle-aged audience.

- Many stations expect to see more black listeners in their audience, as well as more listeners who have not completed a college education.

Program producers, funders, and others can use this framework to assess the prospects for a wide range of programming projects, plus related activities such as research or training.

Framing the Issues

In 1990, the Public Radio Expansion Task Force, working in concert with stations and public radio's regional and national organizations, developed a broad-ranging plan

PUBLIC RADIO PROGRAMMING STRATEGIES was conducted by David Giovannoni (Audience Research Analysis) and Thomas J. Thomas and Theresa R. Clifford (Thomas & Clifford). Funding was provided by the Corporation for Public Broadcasting.

This Executive Summary presents some of the highlights of the study. Stations and producers may want to make additional copies for board members and staff.

A more extensive, 104-page report on the project was sent to public radio stations and producers in Spring, 1992. Additional copies of that report can be obtained through the Corporation for Public Broadcasting. Send a check for \$10 per copy to: Finance Department, Corporation for Public Broadcasting, 901 "E" Street, NW, Washington, DC, 20004-2006.

The PUBLIC RADIO PROGRAMMING STRATEGIES database is available on computer disk. The database includes a directory of station addresses, phone numbers and personnel; station programming and audience classifications; summaries of programming schedules and audience targets at the time of the survey; and a variety of operating information about each station (nonfederal support, market size, satellite interconnection, etc.). Copies are available at cost through Audience Research Analysis, 6512 Sweetwater Drive, Derwood, Maryland, 20855. The database is also available through the Public Radio Program Directors Association, the Association of Independents in Radio, and the National Federation of Community Broadcasters.

that focused on the need for near-complete signal coverage, the development of new "centerpiece programming," an increase in the number of public radio stations linked to the public radio satellite system, and the development of a coordinated strategy that would diversify public radio's audience.

Serving listeners was central to every one of the Task Force goals. The question remained, however, what kind of programming should be fostered to increase and diversify public radio's audience?

Policies that include stations currently outside the traditional public radio universe provide one important avenue to new and different audiences. At the same time, much of our success will be defined by the momentum of stations that currently occupy the most powerful frequencies and have access to considerable financial and organizational resources. PUBLIC RADIO PROGRAMMING STRATEGIES went to both groups of stations to see how these local institutions were grappling with the issues of programming and audience.

Is public radio relatively monolithic in its approach to programming? If there are significant differences, do the stations fall into clusters or are there many stations pursuing as many different programming and audience agendas? How do stations see themselves changing over the next several years? Are new strategies of service evolving at the local level? What is the relationship between investments at the national level and programming strategies at the station level?

Answers and Implications

PUBLIC RADIO PROGRAMMING STRATEGIES answers many of the questions raised by the Expansion Task Force and others. The implications are far-reaching. The public radio system is in flux, but it is not fragmented; it is increasingly driven by the programming and audience equation; and while there are significant strides yet to be made in the area of audience diversification, there are clear signs that the system is moving in that direction.

Stations' program schedules reflect an array of explicit and implicit decisions about what kinds of programming to present and what kinds of listeners to serve. It is increasingly clear that these decisions are leading to a significant differentiation in the service provided by various public radio stations.

While the public radio system has more stations and serves more people, individual stations today offer fewer formats than they did a

decade ago. This format focusing trend will continue as stations become more explicit about audience targets and evaluate programming on its ability to reach those targets.

Even while the numbers and diversity of the station universe expand, differentiation in service may well decrease the number of stations using any particular national or regional program—making the station-producer-distributor relationship increasingly complex. As stations differentiate service to maximize their capacity to serve particular kinds of listeners, the audience for individual stations should grow. System diversity, however, will result in groups of program users that will be very large in some cases and very small in others.

Producers will need to identify "networks of interest"—subsets of stations with a shared content focus and compatible audience targets. Because most programming will be carried by only portions of the system, the relationship between production costs, listeners, and a station's rate of return on their program investment will become even more critical. To be viable, these "networks of interest" must include sufficient numbers of stations, financial resources, and listeners to sustain the producer's efforts.

These trends will accelerate dramatically over the coming decade. New technology will explode channel capacity. The pressure for effectiveness and productivity will become even more acute. Programming will become more specialized, audience targets will narrow, and viability for both programming and stations will be redefined.

As public radio strives to serve more people and more kinds of people in the years to come, the challenge at both the local and the national level is how to channel this growing and powerful momentum for change toward new paths of public service.