

From the *ARAnet* On-Line Library
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The Public Radio Tracking Study
Trend Report
Winter-Fall 1999
All Tracking Stations

by **George Bailey**
(67 pages)

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Final Published Report

The Public Radio Tracking Study

**Trend Report
Winter - Fall 1999**

All Tracking Stations

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Academics and others in higher education . . . often exhibit a conflicted attitude toward money. Academics have long combined a taste for expensive finery with a studied distaste for the pursuit of money.

The dichotomy came into clearer focus in the early 1990s, when I attended a lecture by Stanley Fish, the Duke University deconstructionist, whose topic was “Why Academics Like Volvos.”

-- Daniel Gross

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Final Published Report

We gratefully acknowledge the support of the Corporation for Public Broadcasting, which issued a Challenge Grant to encourage station support during the first year of the Public Radio Tracking Study.

We especially recognize Kay Tuttle and Rick Madden who direct CPB's Future Fund.

This is the ***last report*** that will be openly published for the entire public radio system in recognition of the CPB grant.

The Tracking Study will continue through 2000 and 2001 with confidential proprietary reports delivered to leading stations that support the research.

Reading this Report

This is a complex and detailed report. To take in all of the useful information, you will need to allocate time for serious study.

If you want to jump ahead to particular topics, there is a ***Table of Contents***.

For an executive summary of the most important points, start with the section titled ***Key Findings***.

Thank you for your support of the Public Radio Tracking Study.

George Bailey

The Public Radio Tracking Study
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Key Findings

We conducted nearly 12,000 interviews with public radio listeners who had kept Arbitron diaries during the four quarters of 1999. We have a high degree of confidence in these key findings:

- Public radio listeners are using less radio. The downtrend is continuous – one hour less each year.
- The greatest loss of radio listening is among highly educated listeners with advanced degrees, but that's because they are using less commercial radio.
- The personal importance of public radio in the lives of highly educated listeners is rising to even higher levels.
- Levels of personal importance are rising among listeners who give money to public radio.
- Unfortunately, public radio listeners are becoming more annoyed with on air fund drives.
- Fund drive annoyance is highest among our best prospects – highly educated, loyal givers.
- Underwriting is not annoying to public radio listeners.
- Public radio listeners are becoming more annoyed with telemarketing from public radio stations.
- Public radio listeners understand the significance of listener support, but they are vague on the percentage of government funding.
- There's always churn within the public radio audience, but on average listeners report that they are listening more to public radio.
- On average public radio listeners are feeling more positive about giving money to their local station.

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Method in Brief

The purpose of the Public Radio Tracking Study is to track critical measures of audience service and listener support.

General managers, program directors and development directors agree that public radio must:

- Expand audience service in terms of listeners and listening
- Enhance the importance of programming to listeners
- Build listener support by number of givers and amount given
- Minimize the negatives associated with fundraising

This trend report is based on the Winter, Spring, Summer and Fall 1999 audiences of 20 leading public radio stations.

Recontact Interviews

The Tracking Study method is much the same as Audience 98. We begin with the Arbitron sample of public radio listeners. We know their listening patterns in detail because they kept Arbitron diaries. Later we recontact those listeners and ask them particular questions about public radio, especially with reference to fundraising.

For the Fall 1999 quarter we began with listeners who kept Arbitron diaries in October, November or December 1999. Stations received their Arbitron ratings in February 2000. The recontact interviews for Fall 1999 were conducted during the month of March 2000.

The recontact interviews are conducted by telephone. We pay Arbitron to conduct those interviews, protecting the identity of respondents.

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Stations and Markets

The Public Radio Tracking Study is station-based. 14 stations were on board during all four quarters of 1999:

New York	WNYC AM and FM
Los Angeles	KUSC FM
Chicago	WBEZ FM
Boston	WBUR FM
Washington	WAMU FM and WETA FM
Cincinnati	WGUC FM
Denver	KCFR FM
Seattle	KPLU FM
Hartford	WPKT FM
Tampa	WUSF FM
Raleigh	WUNC FM
Austin	KUT FM

Six more stations joined as of Summer 1999:

Philadelphia	WXPB FM	San Francisco	KQED FM
Cleveland	WKSU FM	Houston	KUHF FM
Portland	KOPB FM	Phoenix	KJZZ FM

WCPN Cleveland joined as of Winter 2000.

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Sample Sizes

The findings in this report are based on 68 independent samples, one for each participating station in each quarter of the year. We sampled metro areas only, with two exceptions:

We sample the Hartford TSA in the Spring and Fall for WPKT FM.

We sample the Cleveland TSA in the Spring and Fall for WKSU FM, then we use the Akron and Cleveland metros in Winter and Summer.

In 1999 the Public Radio Tracking Study completed 11,591 interviews.

That number is already larger than the 8,000 interviews completed for AUDIENCE 98, and the Tracking Study will continue into 2001.

The completion rate is running at 66 percent, meaning that 2 out of 3 public radio listeners who were randomly selected for the study are contacted and agree to cooperate with the interview.

The table below shows completed interviews by station for 1999:

KCFR-FM	754	WBUR-FM	714
KJZZ-FM	232	WETA-FM	792
KOPB-FM	352	WGUC-FM	633
KPLU-FM	739	WKSU-FM	375
KQED-FM	371	WNYC-AM	630
KUHF-FM	304	WNYC-FM	682
KUSC-FM	619	WPKT-FM	662
KUT -FM	609	WUNC-FM	756
WAMU-FM	807	WUSF-FM	562
WBEZ-FM	720	WXPB-FM	278

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Audience Segments

The Public Radio Tracking Study is not designed to measure the size of the audience. We have Arbitron for that. Arbitron counts listeners by standard demographics—age, sex and race.

We designed the Tracking Study to analyze the public radio audience by segments that are much more important for ***strategic planning***:

- Core vs Fringe
- Generational Cohort
- Level of Education
- Current Givers vs All Others

We are especially interested in any ***differences between segments***.

We used statistical tests to look for significant differences, but we did not include statistical jargon in this report.

Looking at the charts that follow, you will see some powerful ***differences*** between strategic segments of the audience. And sometimes you will see that there is ***agreement*** across all segments. Each finding is meaningful.

Longitudinal Trends

Most importantly we are looking for longitudinal trends. In which direction are we headed? What can we expect in the future?

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Listening to Radio and Public Radio

It is a fact that overall levels of radio listening as measured by Arbitron have been dropping each year. Duncan's American Radio reports that Persons Using Radio fell from 18 percent to 15 percent in the last decade.

But that decline in radio use is calculated across all radio listeners in America, most of them not public radio listeners. Even if you track PUR levels in your own market, you are primarily tracking commercial listeners.

We care about public radio listeners – thus the Public Radio Tracking Study. Are public radio listeners using less radio? Are they using less public radio?

Each quarter the RRC delivers Arbitron audience estimates to public radio managers. You can track listening to a single public radio station, but that is not the entire picture.

- Your listeners may use more than one public radio station. The trend in TSL to your station is only one component of their Time Spent Listening **to public radio**.
- Your listeners may also use commercial radio. Their total radio consumption is the sum of listening **to public and commercial radio**.

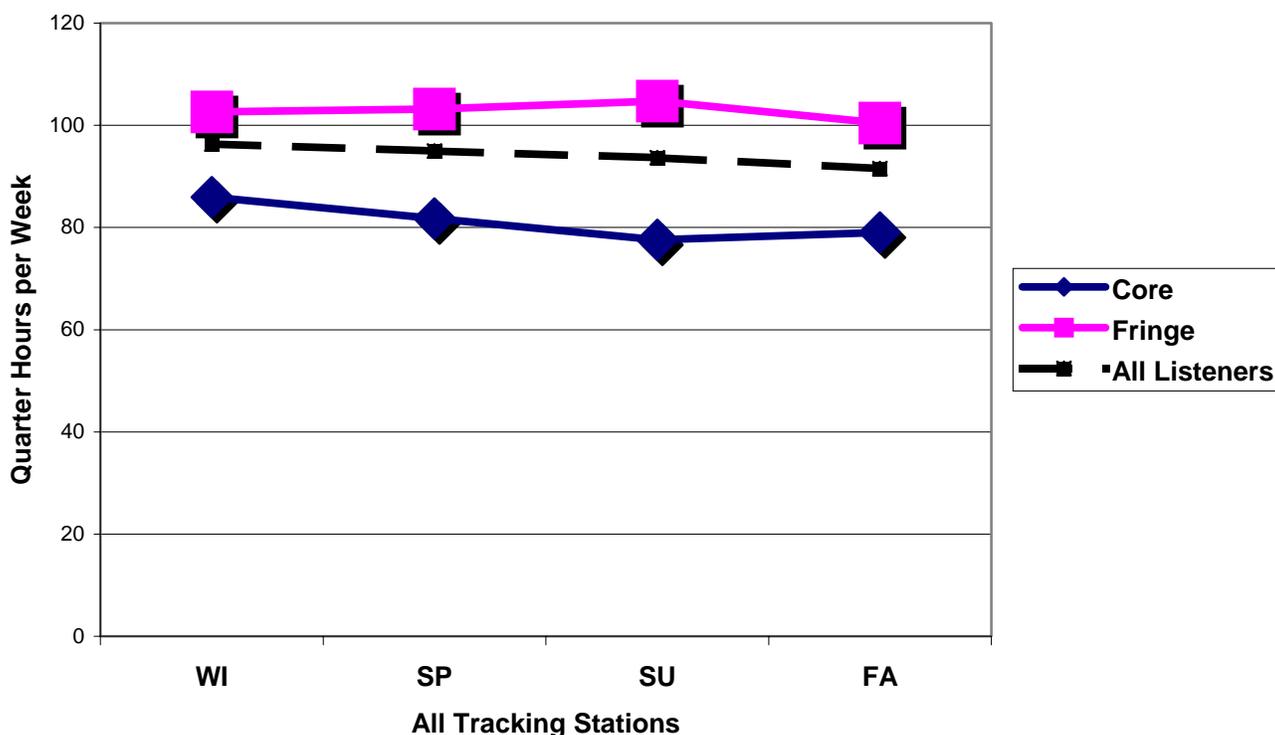
As you read the following charts, keep in mind that listening “to public radio” means **the combined listening** to multiple public radio stations in a market – more than is reported in a single station's ratings.

Also keep in mind that listening “to radio” means listening to both commercial and public stations by public radio listeners.

Let's start by looking at Time Spent Listening to radio by our listeners.

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TSL to Radio by Core/Fringe



The dashed line shows TSL to radio by public radio listeners. At the start of 1999, public radio listeners were using radio for 96 quarter hours per week. That was 24 hours per week or 8 hours per day on average.

Each sweep during 1999 that figure **decreased** about one quarter hour.

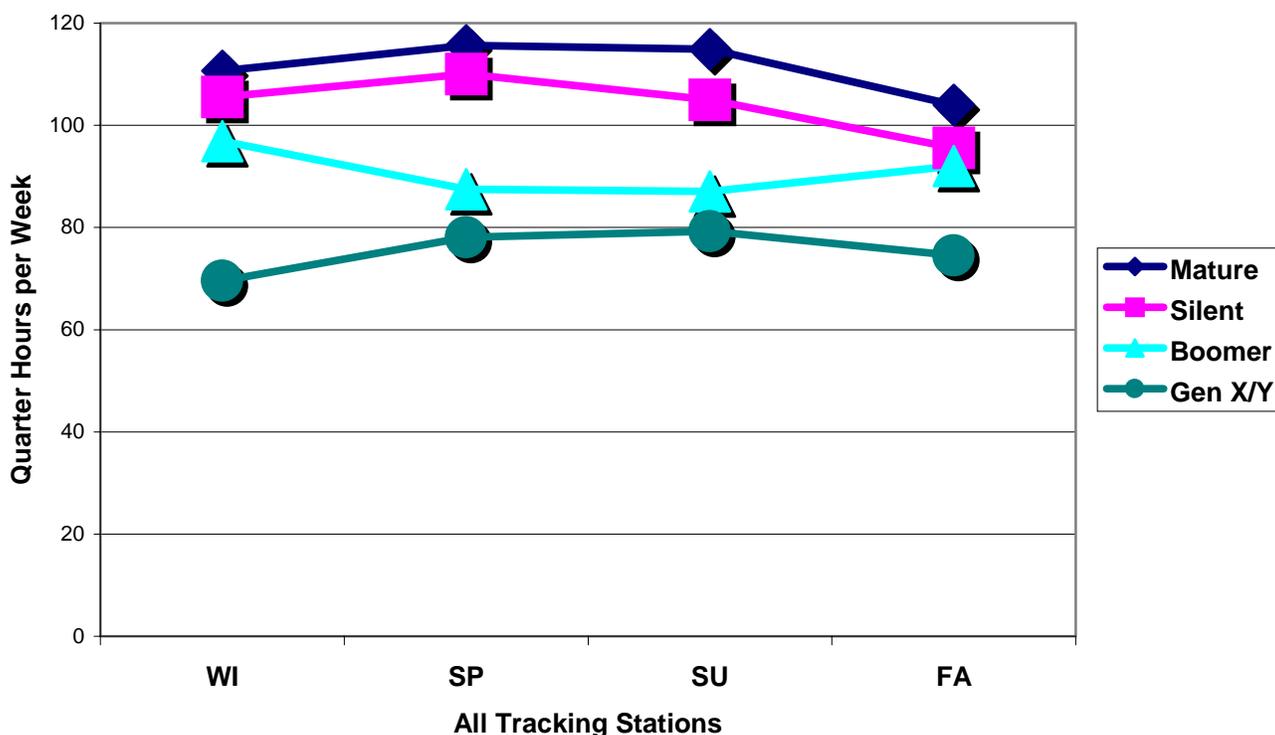
By the end of 1999, public radio listeners were using radio for 92 quarter hours per week. That's down to 23 hours per week. One hour less.

We found that the number of **occasions of tune in to radio** is dropping each sweep among Core public radio listeners. The decline in occasions to radio by Core is driving down their TSL to radio.

Please don't leap to the most simplistic explanation (that it must be the Internet.) Our listeners may be turning to other media, or perhaps their domestic and professional lives are changing. There are multiple causes.

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TSL to Radio by Cohort



Is the decline in PUR generational? Not really. This chart shows the trend in radio listening by generational cohorts within the public radio audience.

Within our audience, older listeners use more radio. You can see how the four generations line up in order. Matures are the heaviest radio listeners, in part because they are no longer working. The youngest public radio listeners, Gen X/Y, use the least amount of radio.

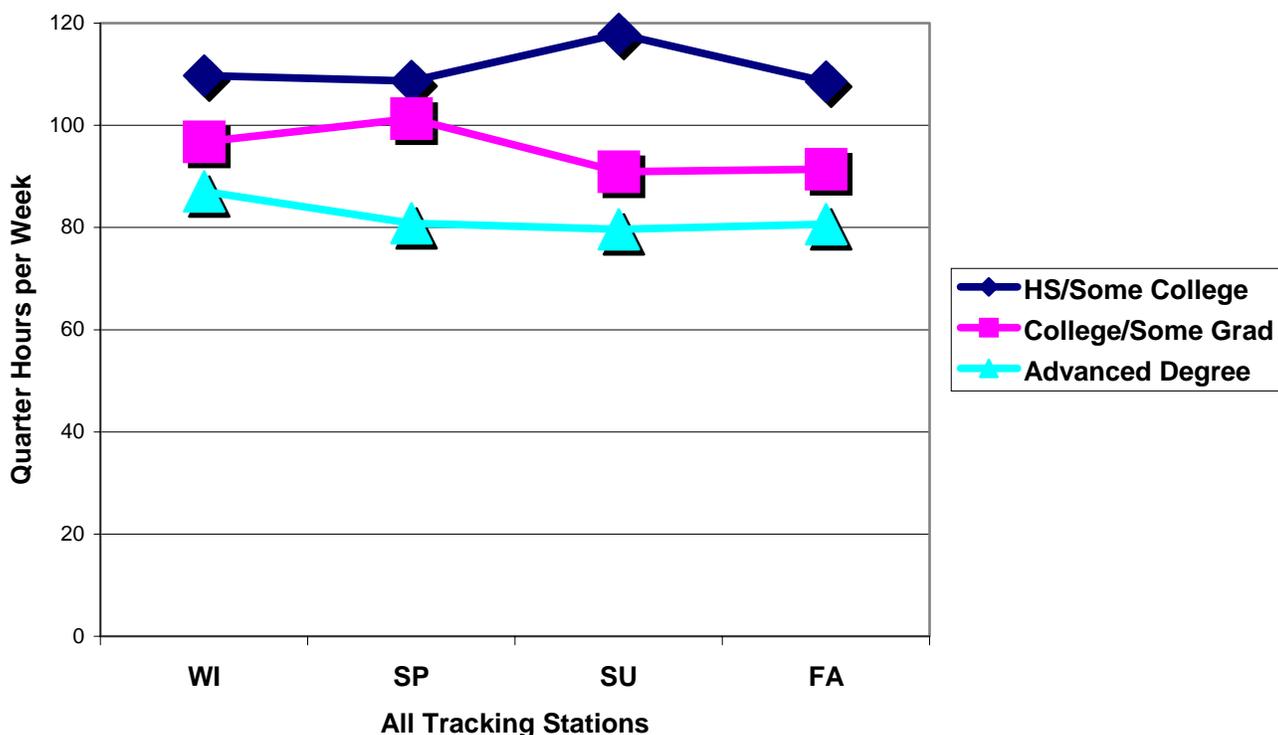
Boomers (36-54) and Silents (55-67) dominate the audience for most public radio stations.

A public radio station that is targeted towards Generation X is competing for share of a relatively small radio pie, since Xers are lighter radio listeners than Boomers or Silents.

Here are the defining birth years: Mature (pre-1933), Silent (1933-1945), Boomer (1946-1964), Gen X/Y (post-1964).

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TSL to Radio by Education



Education rather than generational cohort is the more powerful predictor of declining radio use by public radio listeners.

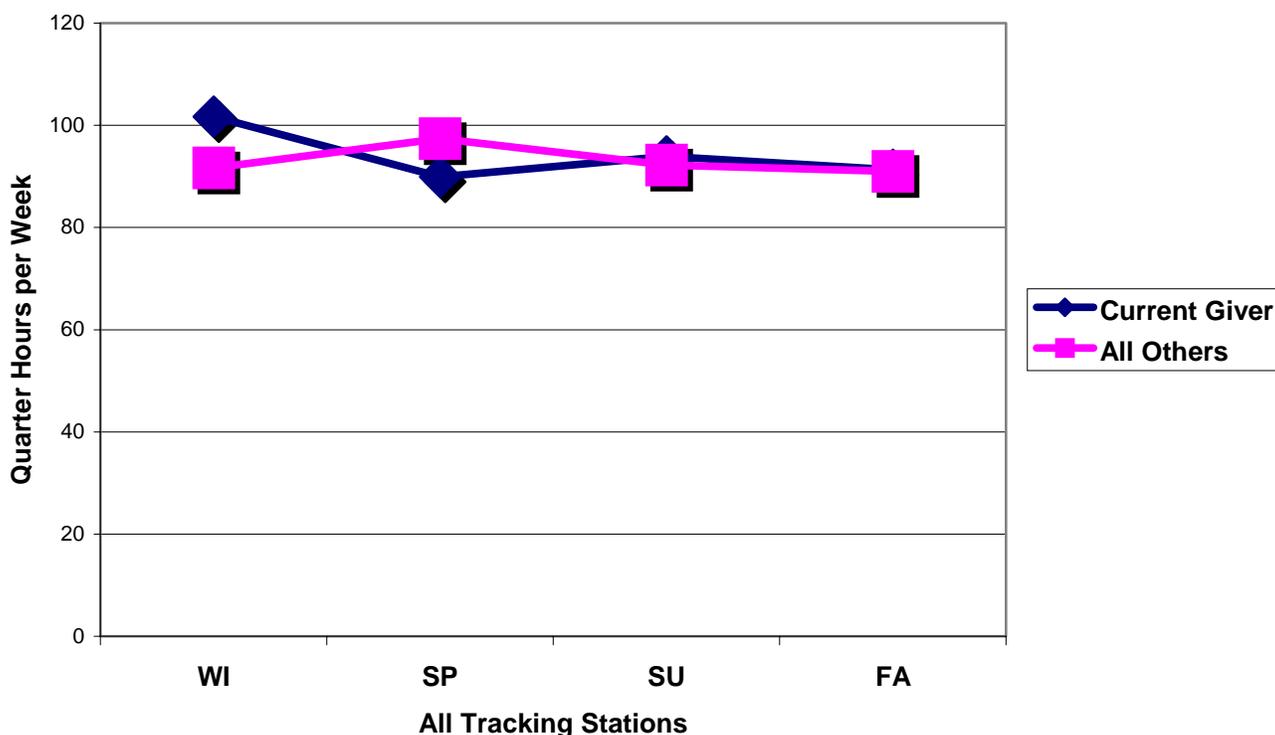
This chart shows that within the public radio audience, the most highly educated segment uses the least radio. Public radio listeners who have advanced degrees now consume about 80 quarter hours or 20 hours of radio per week. Statistically, that figure is **declining each sweep**.

In contrast, public radio listeners who did not graduate from college consume about 110 quarter hours of radio per week. Which helps to explain how those lesser-educated listeners got into the elite public radio audience in the first place. They use a lot of radio.

The college graduates within the public radio audience are using less radio. Especially those with **advanced degrees**.

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TSL to Radio by Givers



The total public radio audience, consisting of givers and non-givers, is using less radio each quarter. This chart shows that the decline is happening among both givers and non-givers.

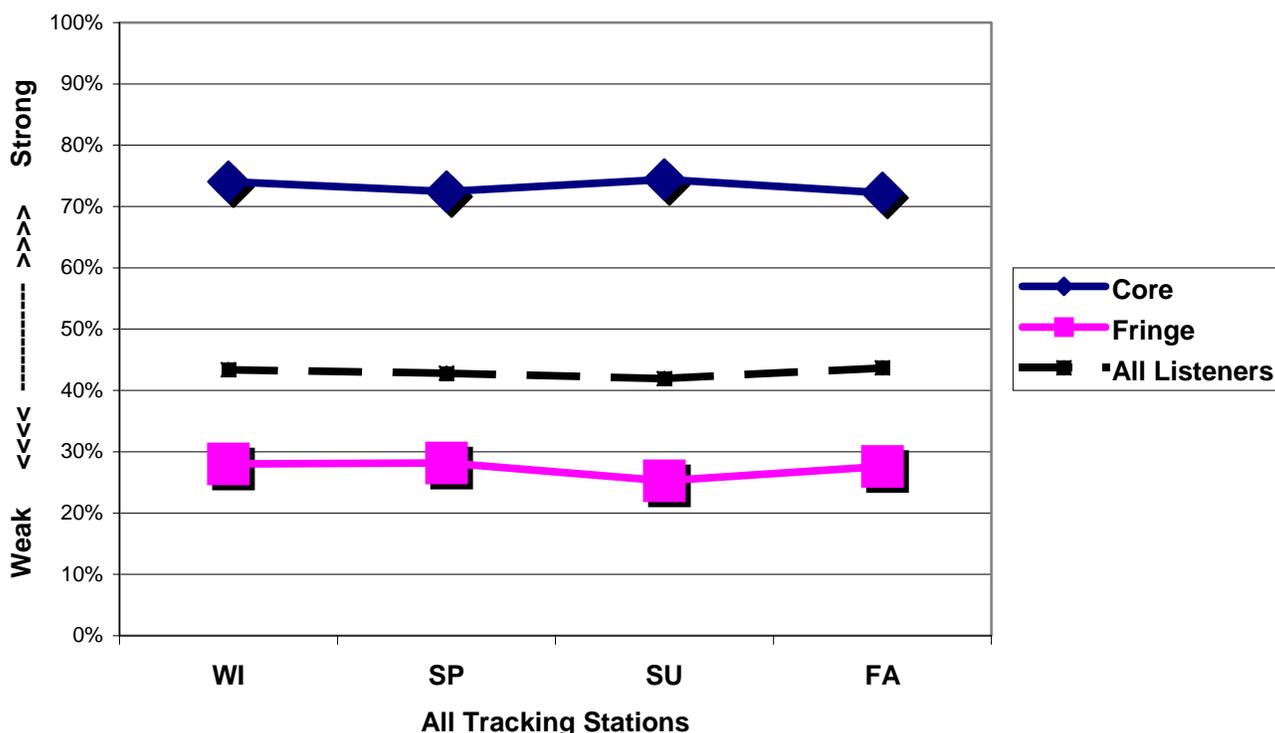
Statistically, we found that people who give money to public radio are using radio for fewer occasions of tune in each sweep.

Suppose we were selling a particular brand of beer. We would try to get beer drinkers to buy our brand, but we could not do much about the total consumption of beer. That's a function of how people live their lives.

If public radio listeners are using less radio, we will have to compete for increased loyalty just to maintain present levels of average quarter hour listening to public radio. So let's look at what's happening to loyalty.

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Loyalty to Public Radio by Core/Fringe



You are used to seeing loyalty to a given public radio station. This chart shows loyalty *to public radio*. That includes listening to more than one public radio station. This chart shows what percentage of our listeners' radio listening goes to public radio.

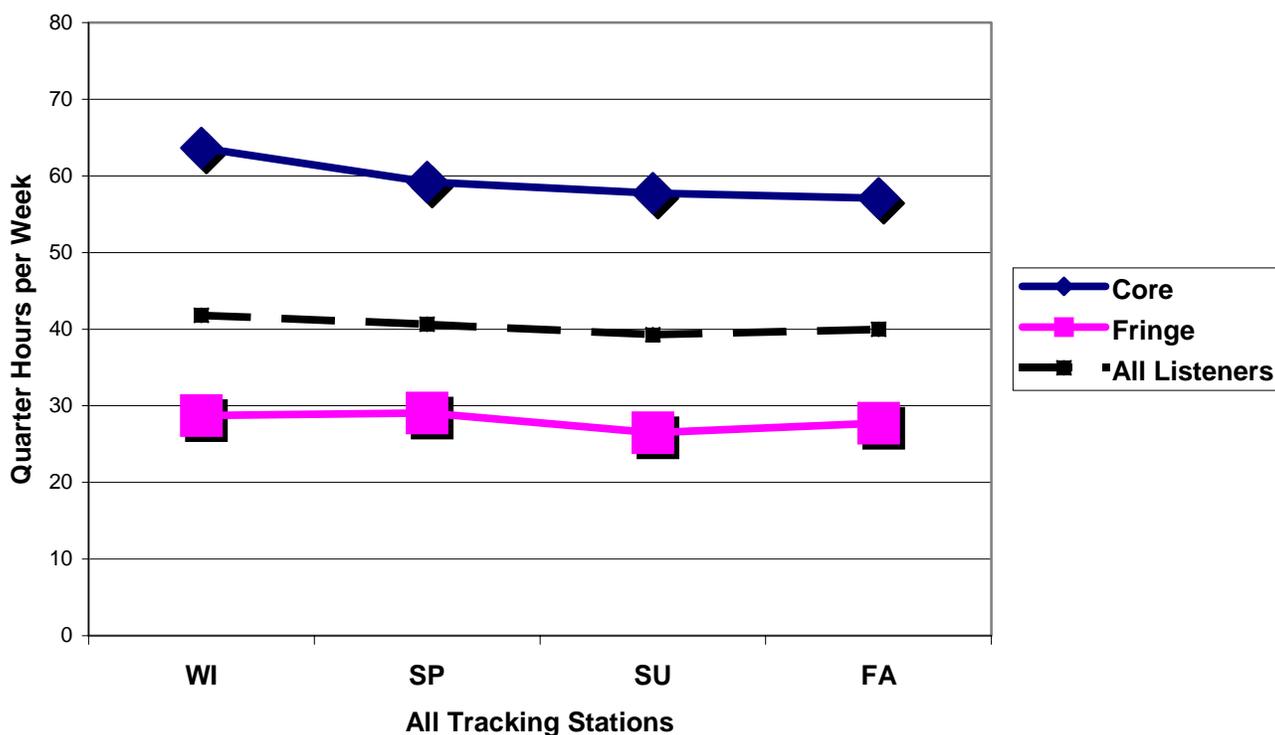
There's a big difference between Core and Fringe. Listeners who are Core to a public radio station spend over 70 percent of their radio listening time with public radio. Fringe listeners are less than 30 percent loyal.

Statistically, the trend is flat. During 1999 we saw no significant increase or decrease in loyalty to public radio by either Core or Fringe listeners.

What this chart does not show is whether some listeners who were Fringe might be moving into the Core. Methodologically, that would require a true panel design. If you are a PD, your job is to upgrade Fringe into Core.

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TSL to Public Radio by Core/Fringe



This chart shows Time Spent Listening *to public radio* – the multiple public radio stations in a listener’s diary.

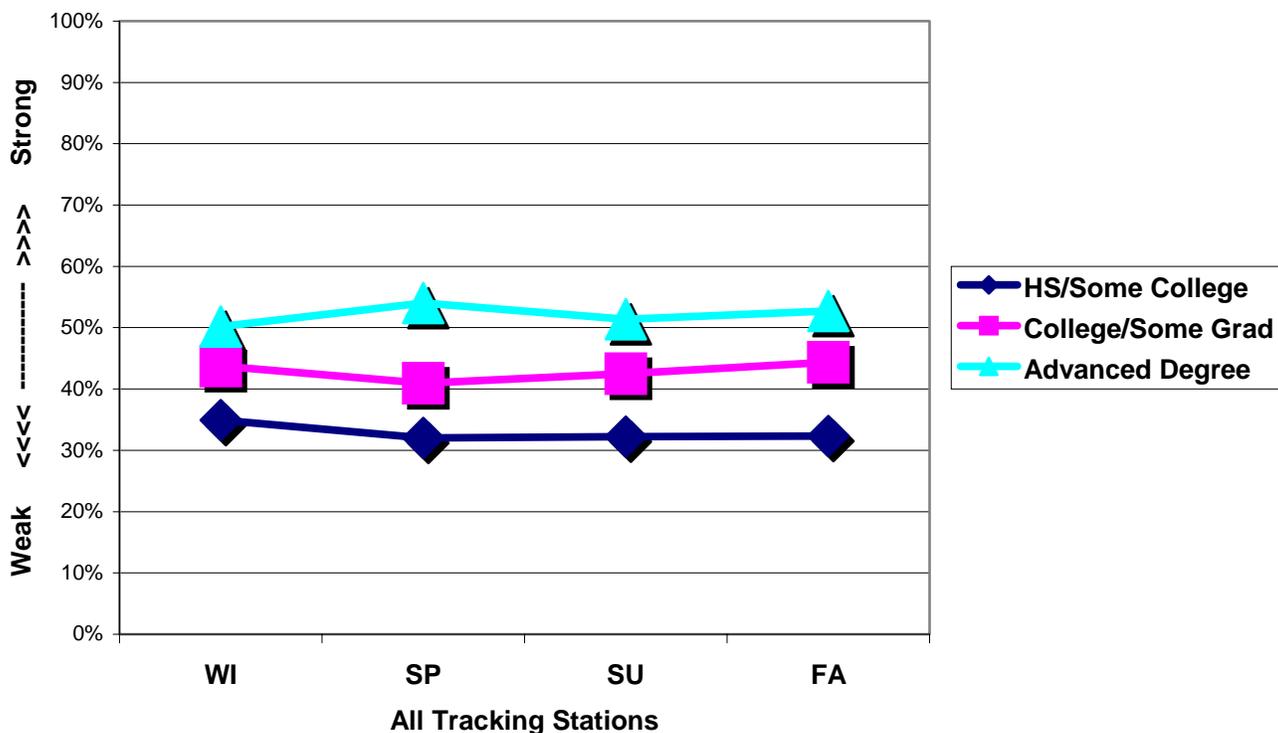
In Winter 1999 Core listeners consumed 64 quarter hours of public radio per week. Their TSL dropped to 57 quarter hours by Fall 1999. However, there was some recovery in Winter 2000, and when we ran statistical tests this apparent downtrend was *not significant*. At least not yet.

All of this is very tricky, especially because we are tracking a really great set of 20 leading public radio stations. They are upgrading Fringe listeners into Core each sweep. Their Core composition is improving.

On the other hand, there is certainly no evidence that TSL to public radio is increasing among Core or Fringe listeners.

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Loyalty to Public Radio by Education



This chart shows loyalty to public radio (including multiple stations) by levels of education. Statistically, when we ran this trend out to Winter 2000, loyalty to public radio is ***trending up among college graduates***.

The highest loyalty is by pathetically over-educated Volvo-Americans.

While there are some listeners in our audience who did not graduate from college, they are 70 percent loyal to commercial radio.

Now think about this: We saw that the highly educated people in our audience are relatively light radio users. As their overall radio use declines we must increase their loyalty to public radio just to maintain AQH levels.

The good news: So far it appears that highly educated public radio listeners are using less radio overall primarily because they are using ***less commercial radio!***

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Personal Importance

The fundamental concept that came out of Audience 98 was Personal Importance. We learned that programming on public radio could be important in the lives of target listeners.

Listening to public radio is a necessary but not sufficient condition for giving. Personal Importance is a powerful predictor of giving to public radio. Listeners who **value our programming** send money.

Here is the question as worded in the Public Radio Tracking Study:

The programming on [station] is an important part of my life. If it went away I would miss it.

Do you agree or disagree with that statement?

Is your [agreement/disagreement] weak, moderate or strong?

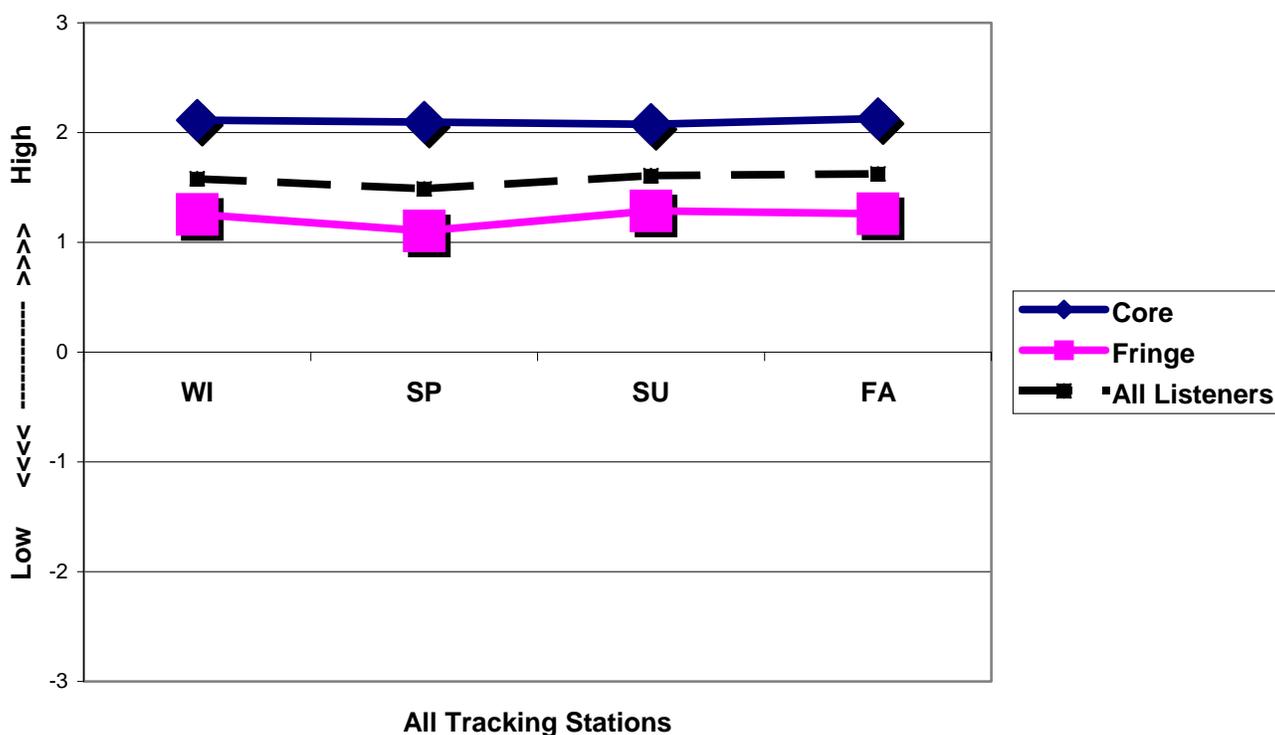
We ended up with a six-point scale ranging from strong agree to strong disagree with the statement.

Each of the following Personal Importance charts will show mean scores by segments of the audience.

The first segmentation is Personal Importance by Core vs Fringe listeners.

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Personal Importance by Core/Fringe



The scale is Personal Importance. Plus 3 would be the highest Personal Importance. Minus 3 would be the lowest.

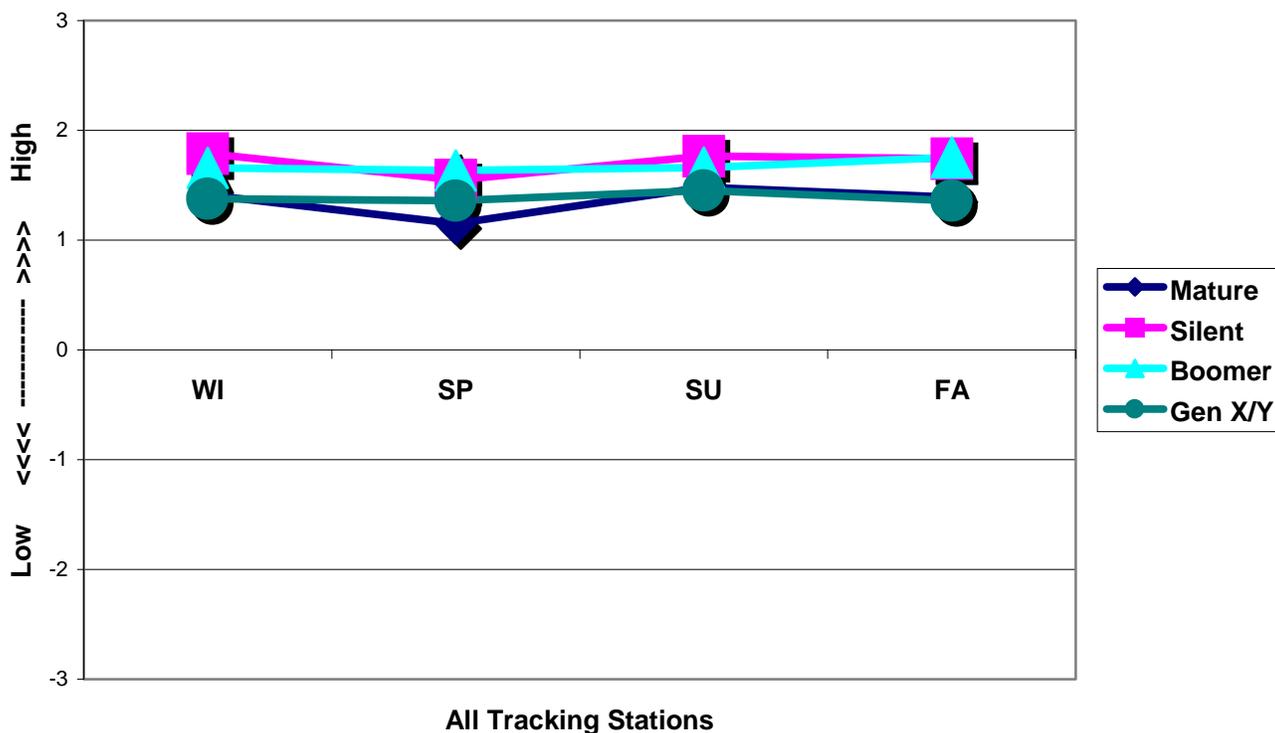
The dashed line is the aggregate score for all public radio listeners. It is in the positive zone, meaning that our listeners generally agree that public radio programming is important in their lives.

However, the Personal Importance score is significantly higher for Core listeners. That means they not only listen more than Fringe but also relate more personally to our programming.

The good news here is that Personal Importance is holding steady at these positive levels as public radio listeners are using less radio. Perhaps commercial radio is becoming less important in their lives.

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Personal Importance by Cohort



Generational Cohort can be a powerful predictor of media use. We know that Gen Xers rarely read the newspaper. Boomers listen to Classic Rock.

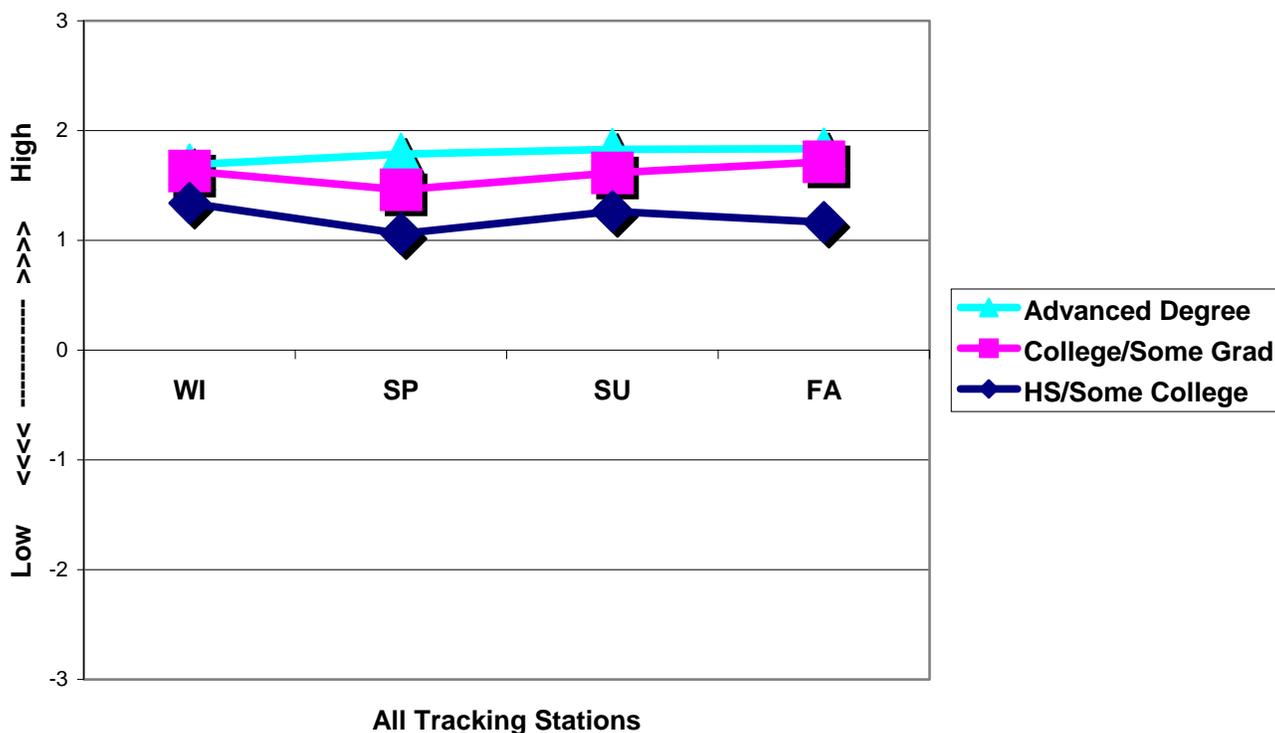
Matures were born before 1933. They came of age during the Depression and World War II. Most are in their 70s, 80s and 90s.

Gen X/Y consists of anyone born since 1964. We think of them as young for public radio, but the oldest Gen Xer is now 35 years old.

But we found that generational Cohort does not relate to Personal Importance among public radio listeners. Our programming can be equally valuable to Xers and Matures – ***if they are highly educated.***

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Personal Importance by Education



This chart shows how different educational segments assess the Personal Importance of programming on public radio stations.

You can see that the importance scores are in the positive zone across education segments but that listeners without college degrees find relatively less value in our programming.

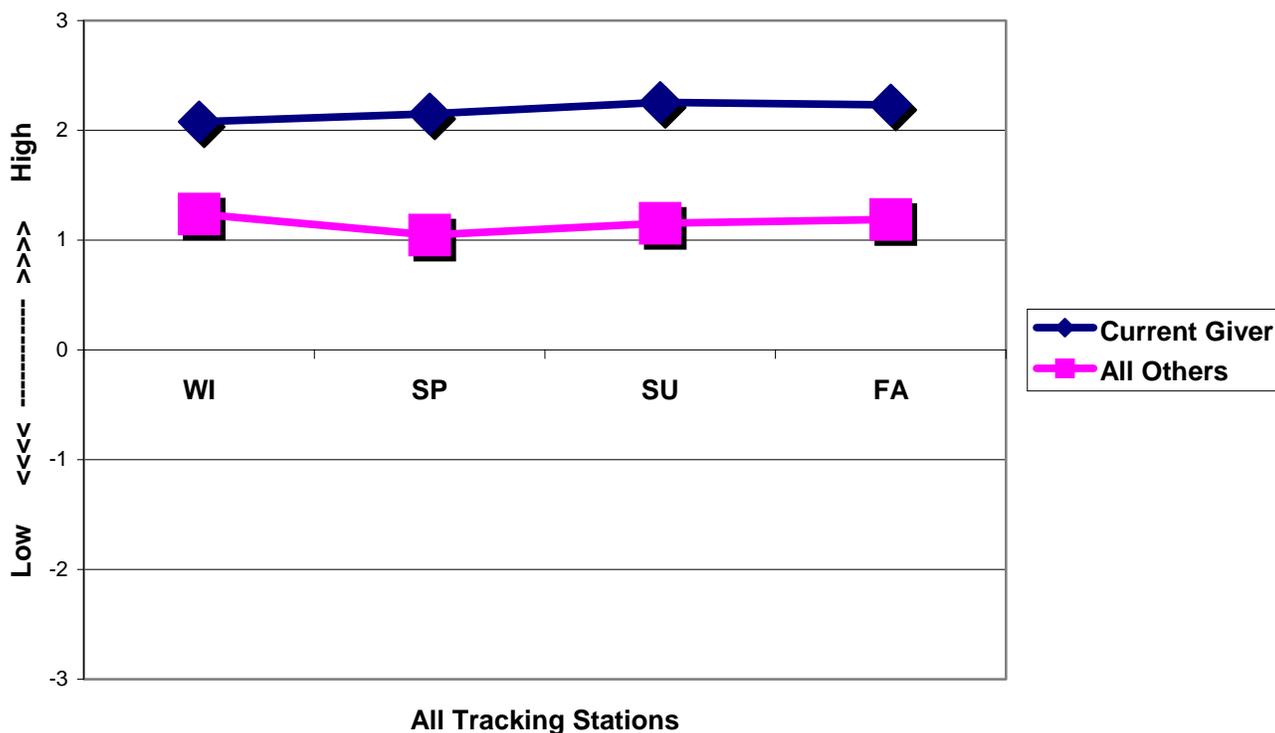
Audience 98 demonstrated that two VALS types – Actualizers and Fulfilleds – generate most of the listening and giving to public radio.

Building on Audience 98, we know that the best predictor of those VALS types within the public radio audience is advanced education.

Statistically, the personal importance scores are rising higher each sweep ***among public radio listeners with advanced degrees.***

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Personal Importance by Givers



This chart shows the relationship between Personal Importance and giving money to public radio. Listeners become givers when the programming becomes important in their lives.

See the last section of this report for details on how we defined giving. For now understand that by Current Giver we mean a public radio listener from a household that sent money to a station within the last 12 to 18 months.

All Others means all other listeners including “lapsed” givers.

We’re happy to report that Personal Importance scores are very high and **rising among Current Givers**. That’s why we are not concerned about the possibility that overall radio use may decline among listeners who give money to public radio.

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Fund Drive Annoyance

Leading public radio stations are trying various innovative tactics to reduce the negatives associated with on air fund drives while maintaining their effectiveness in generating pledges. Last year five of the Tracking Study stations actively participated in the Listener Focused Fundraising project.

We asked listeners whether they were annoyed by on air fund drives, tracking that annoyance over four quarters of the year. The wording was:

The on-air membership drives on [station] are annoying to me. Do you agree or disagree with that statement?

Is your [agreement/disagreement] weak, moderate or strong?

The result was a six-point scale where +3 would indicate strong agreement and -3 would indicate strong disagreement.

On the following chart there are three lines:

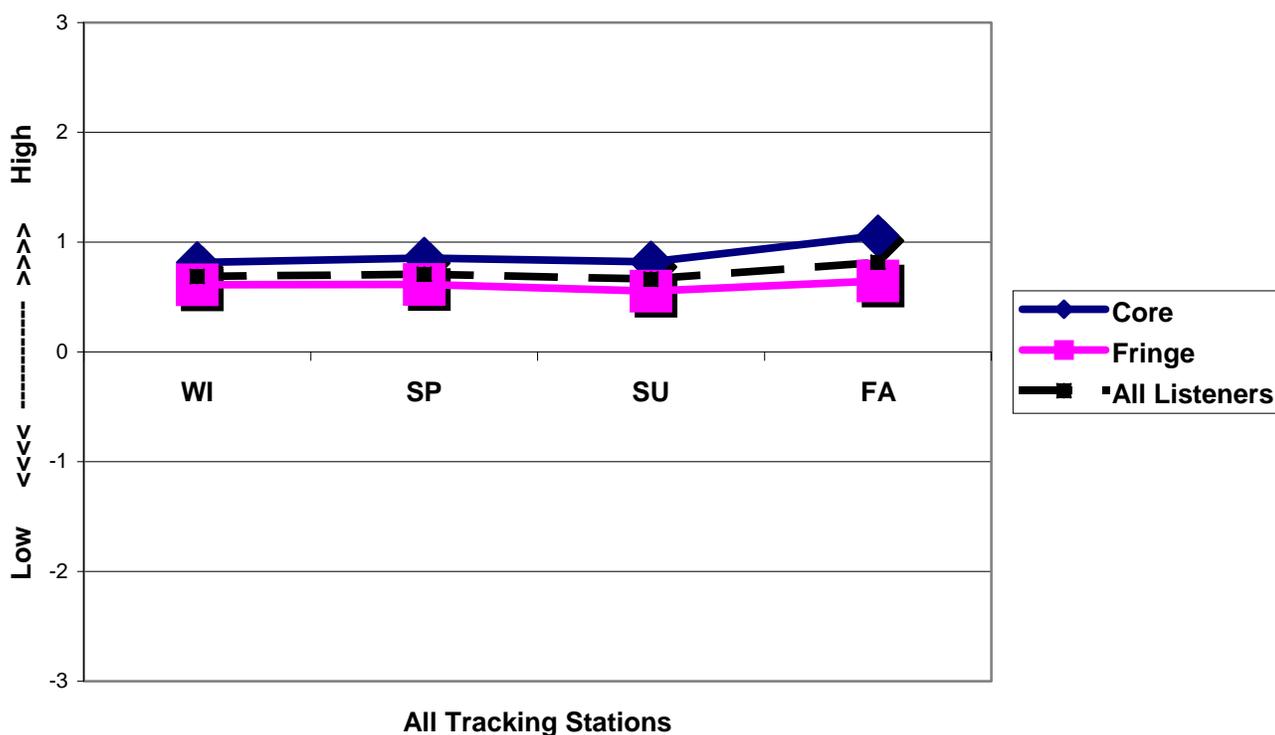
Core – Core listeners

Fringe – Fringe listeners

All Listeners – The average score across all Tracking stations

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Fund Drive Annoyance by Core/Fringe



We see **no evidence** that fund drives became any less annoying during 1999 across the 20 Tracking Study stations.

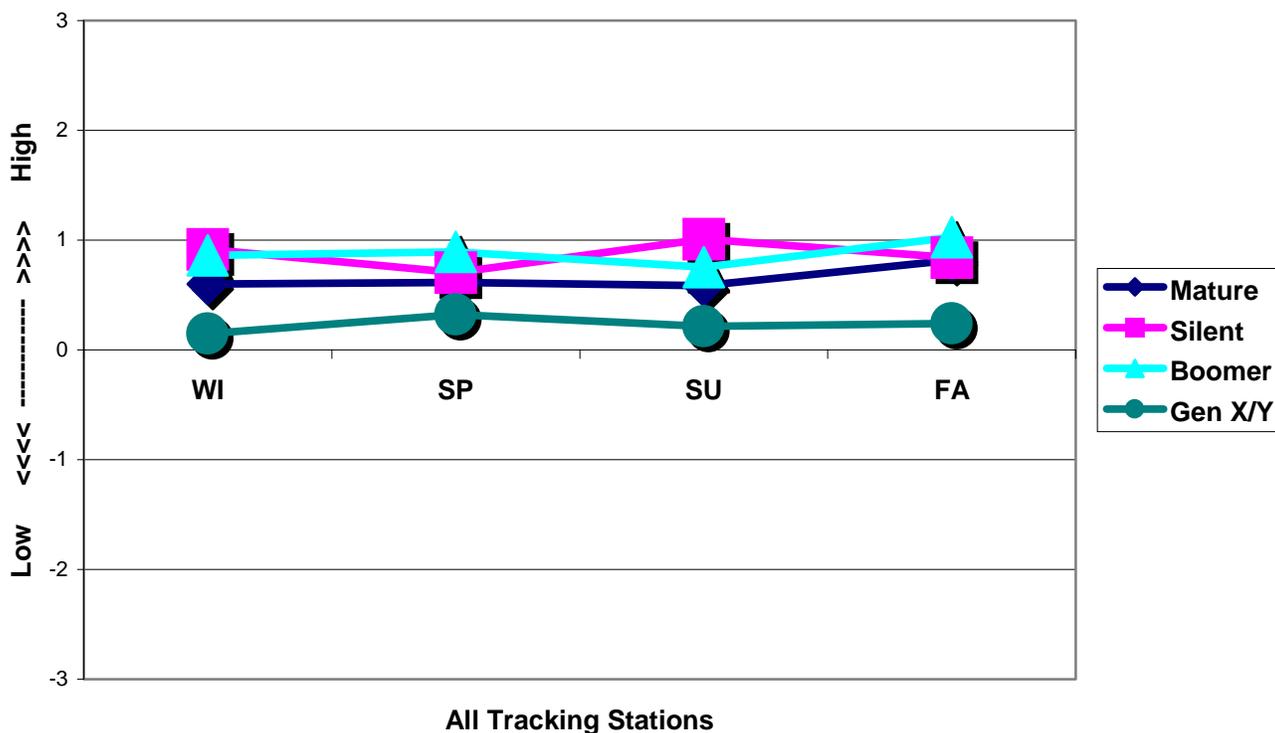
In fact, there was a **slight increase** in fund drive annoyance in Fall 1999.

We suspect that Core listeners are somewhat more annoyed than Fringe because they listen more. Also, in focus groups they tell us that they already sent in their money – and still have to endure the pitching.

Annoying fund drives may or may not be effective. But why have any programming on your station that is annoying?

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Fund Drive Annoyance by Cohort



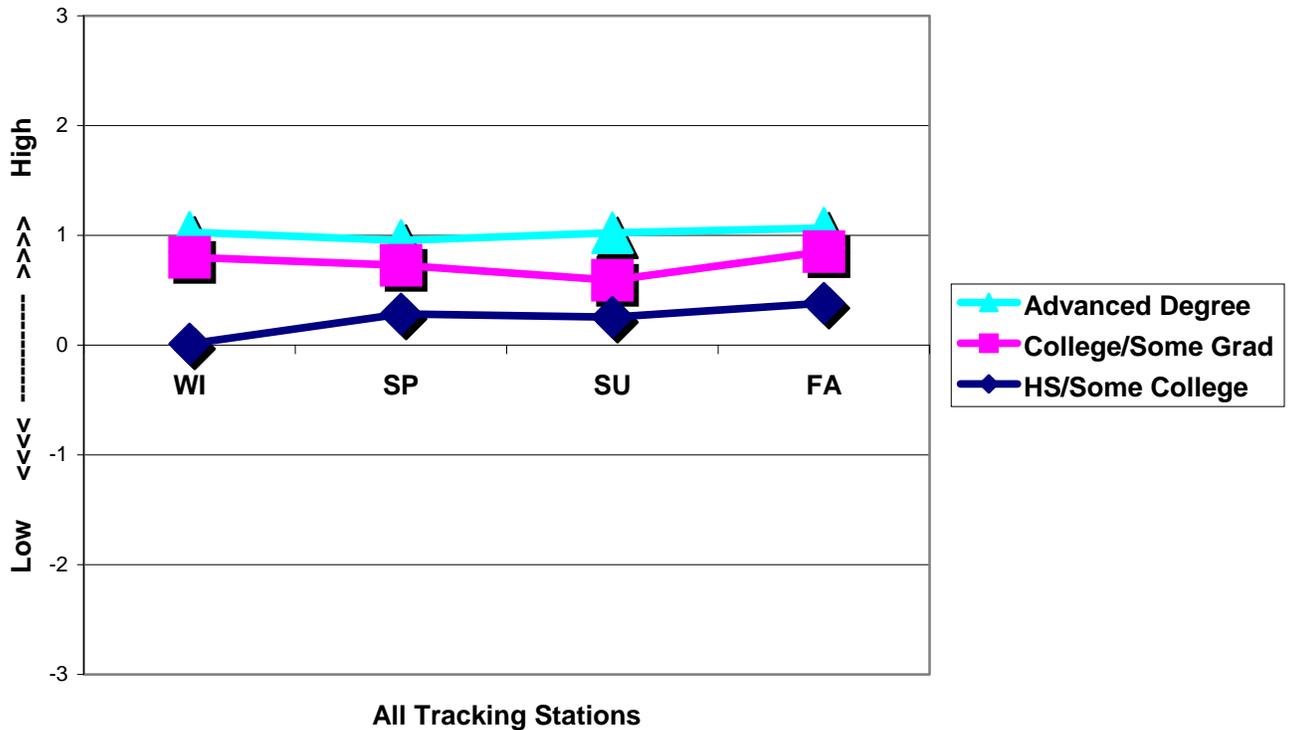
This chart shows Fund Drive Annoyance by the four generations of listeners in the public radio audience.

Gen Xers are somewhat less annoyed by fund drives than older cohorts, but then Gen Xers are lighter users of public radio.

There's no difference between Boomers, Silents and Matures in their annoyance with fund drives.

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Fund Drive Annoyance by Education



Fund drives are the most annoying to listeners with advanced degrees. If you are following the theme of this report – advanced education – then you realize this finding is definitely not good news.

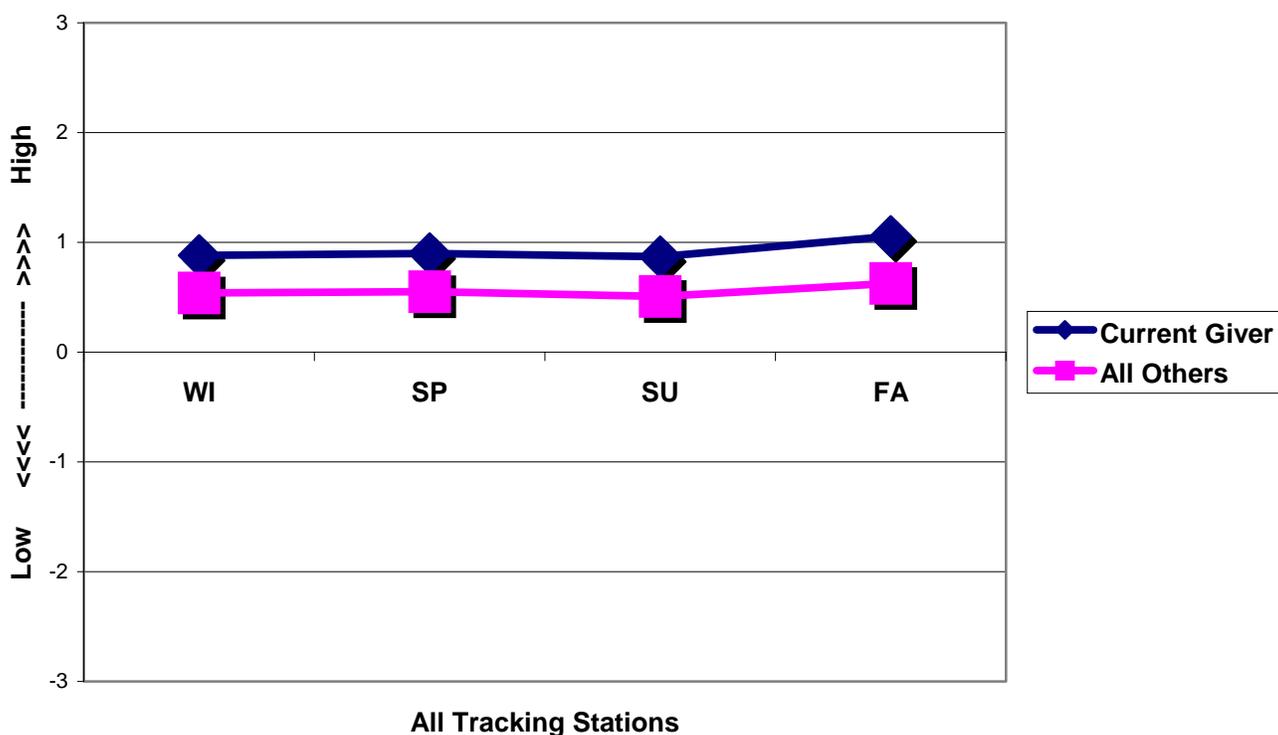
Recall that listeners with higher education are much more likely to be Actualizers and Fulfilleds. And they are our best prospects for giving.

If Fund Drive Annoyance is especially high among listeners with advanced degrees, that means they perceive a clash of **fundamental values** between the programming and the fund drives on public radio.

That's what we hear in focus groups. During a drive, the station changes its values. And our highly educated listeners are most sensitive to that, because public radio programming appeals to their values.

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Fund Drive Annoyance by Givers



We have heard it said that those people who support public radio actually enjoy on air fund drives. It's kind of like a community barn-raising.

Well, that's not the reality.

This chart shows that our Current Givers are more annoyed by fund drives than non-givers. And their annoyance is **rising**.

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Acceptance of Underwriting

Note that we titled this section ***Acceptance*** of Underwriting.

That is because we find very low levels of annoyance with underwriting, despite what you may have heard expressed as conventional wisdom.

The “soc-cons” who started public radio were afraid that our listeners would object to underwriting. Public radio grew out of a noncommercial or even an anti-commercial way of thinking about media.

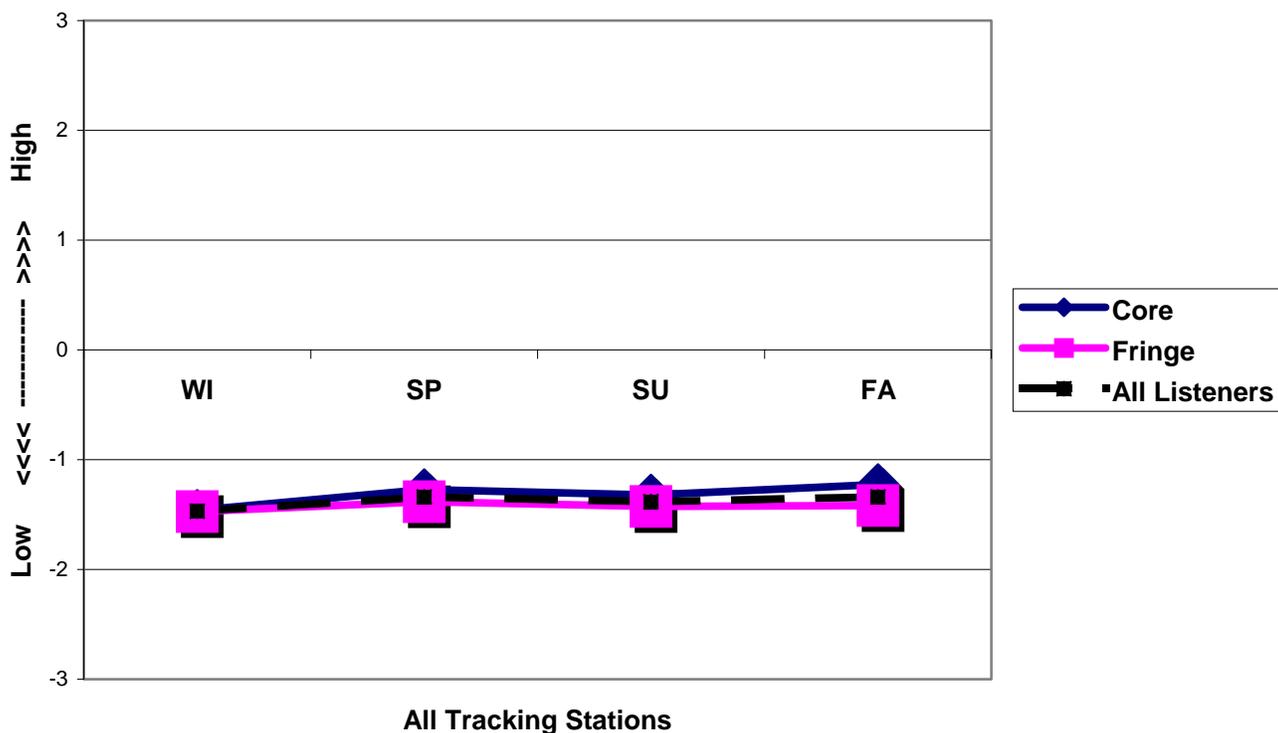
We asked listeners to agree or disagree with this statement:

The announcements of businesses that support or underwrite programming on [station] are annoying to me.

We found that public radio professionals who are themselves annoyed with underwriting are out of touch with the audience.

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Underwriting Annoyance by Core/Fringe



As you can see, this chart for Underwriting Annoyance is strikingly opposite the charts for Fund Drive Annoyance.

The lines for Underwriting Annoyance are in the low zone.

That means most of our respondents **disagreed** with the statement.

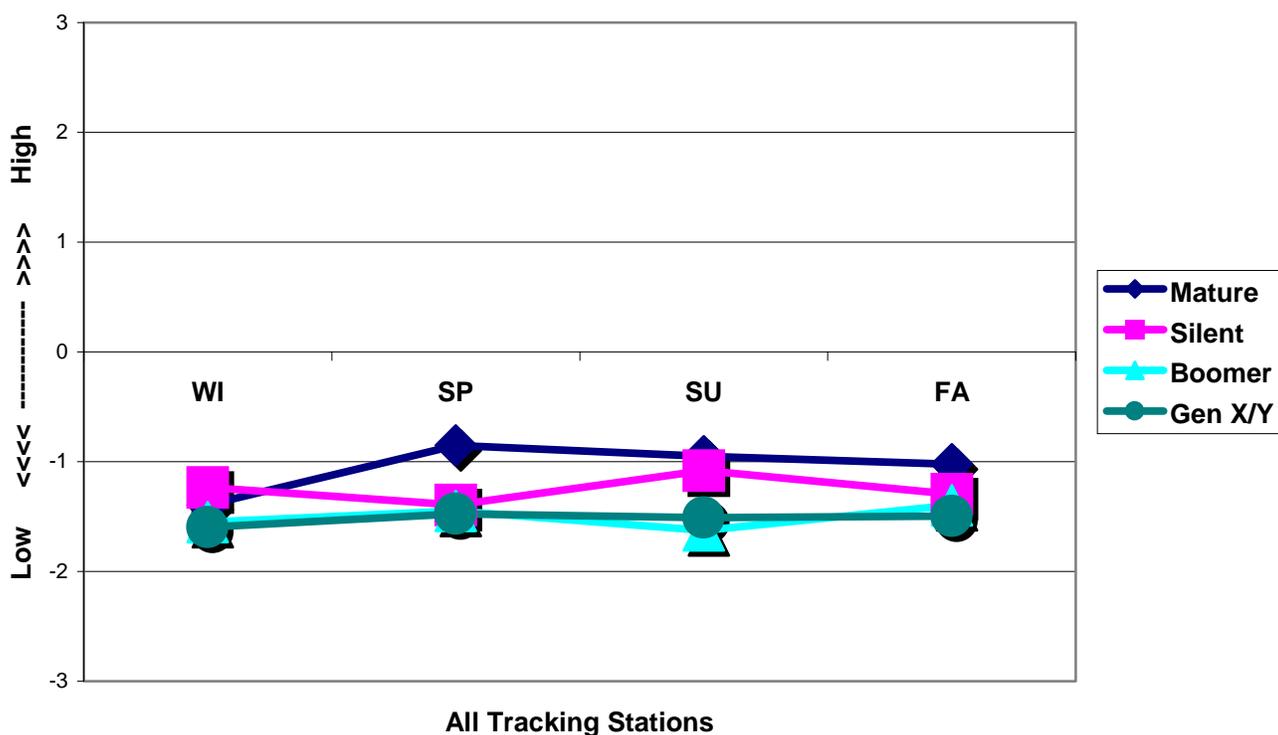
They told us that underwriting was **not** annoying.

And across the four quarters of 1999 there was no significant movement.

There is no difference between Core and Fringe in their general acceptance of underwriting on public radio.

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Underwriting Annoyance by Cohort



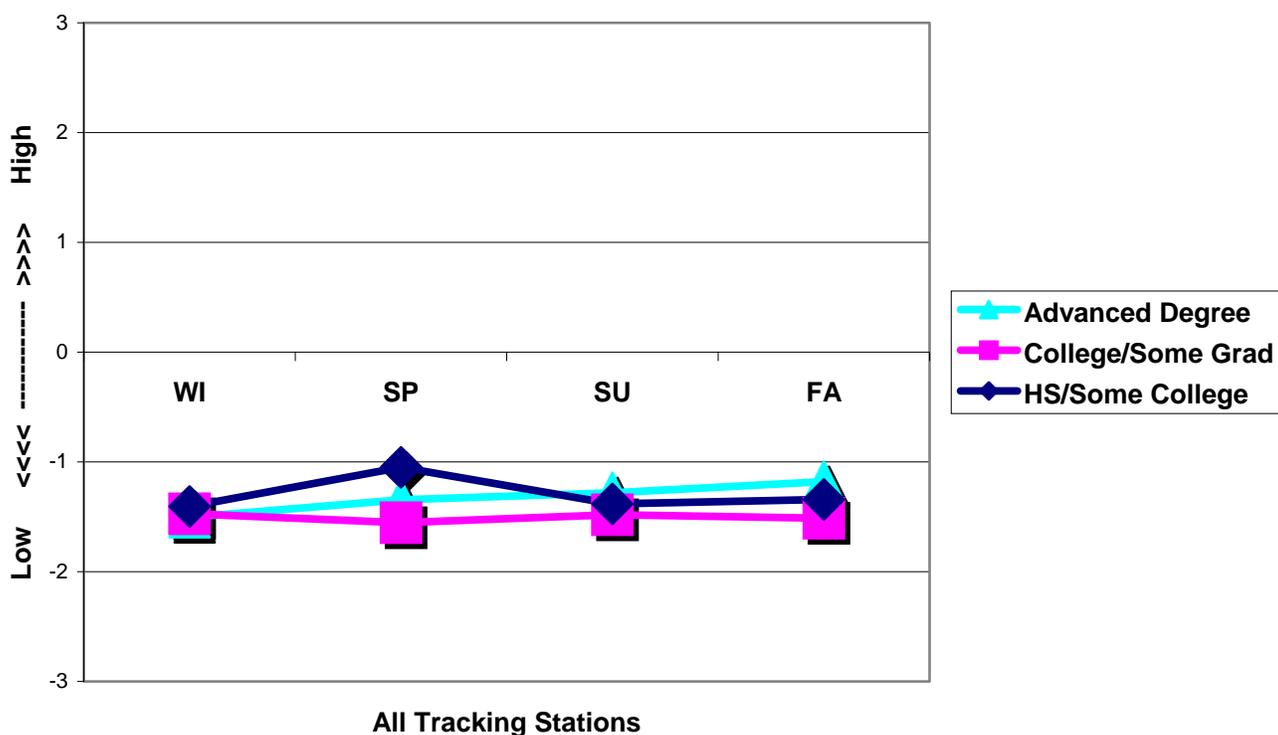
This chart shows Underwriting Annoyance by generations of listeners within public radio's audience.

On this chart if any line is trending down, towards **less underwriting annoyance**, that is the right direction.

Different generations have different values in how they view the world in general and public radio in particular. But there is no dramatic difference between the generations in acceptance of underwriting on public radio.

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Underwriting Annoyance by Education



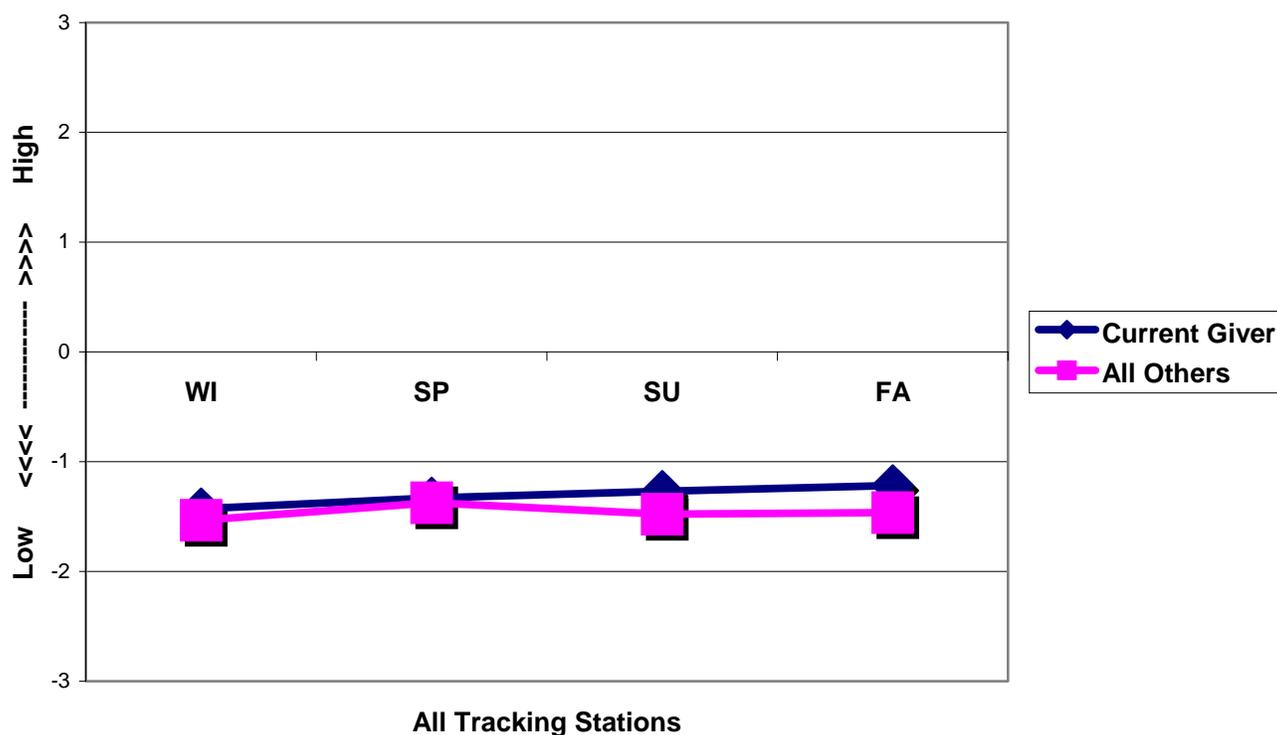
This chart shows Underwriting Annoyance, or more properly Acceptance of Underwriting, by level of education. There is agreement across segments.

Most listeners **disagreed** with the statement that underwriting is annoying.

Looking at the various audience segments, we find that underwriting on public radio is **not a problem**.

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Underwriting Annoyance by Givers



One idea that we hear from time to time is that increased underwriting on public radio will decrease the incentive for individual giving. This chart shows Underwriting Annoyance by givers and non-givers.

In the Tracking Study so far we see **no solid evidence** that increased underwriting will make listeners less likely to give.

There is a very slight rise in the trend line for givers. But givers are still well within the zone of underwriting **acceptance**.

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Telemarketing Annoyance

Fund drives and underwriting appear on our air as programming. Now we turn to development activities that intrude into the home environment of our listeners – telemarketing and direct mail.

We did not expect to hear listeners say that they enjoyed getting phone calls asking for money. But there are different ways to conduct telemarketing, just as there are different styles of on air fund drives.

And we are interested in any differences in Telemarketing Annoyance that might relate to strategic segments of the public radio audience.

We wrote the Telemarketing Annoyance question like this:

The telephone calls to my home from [station] asking for money are annoying to me.

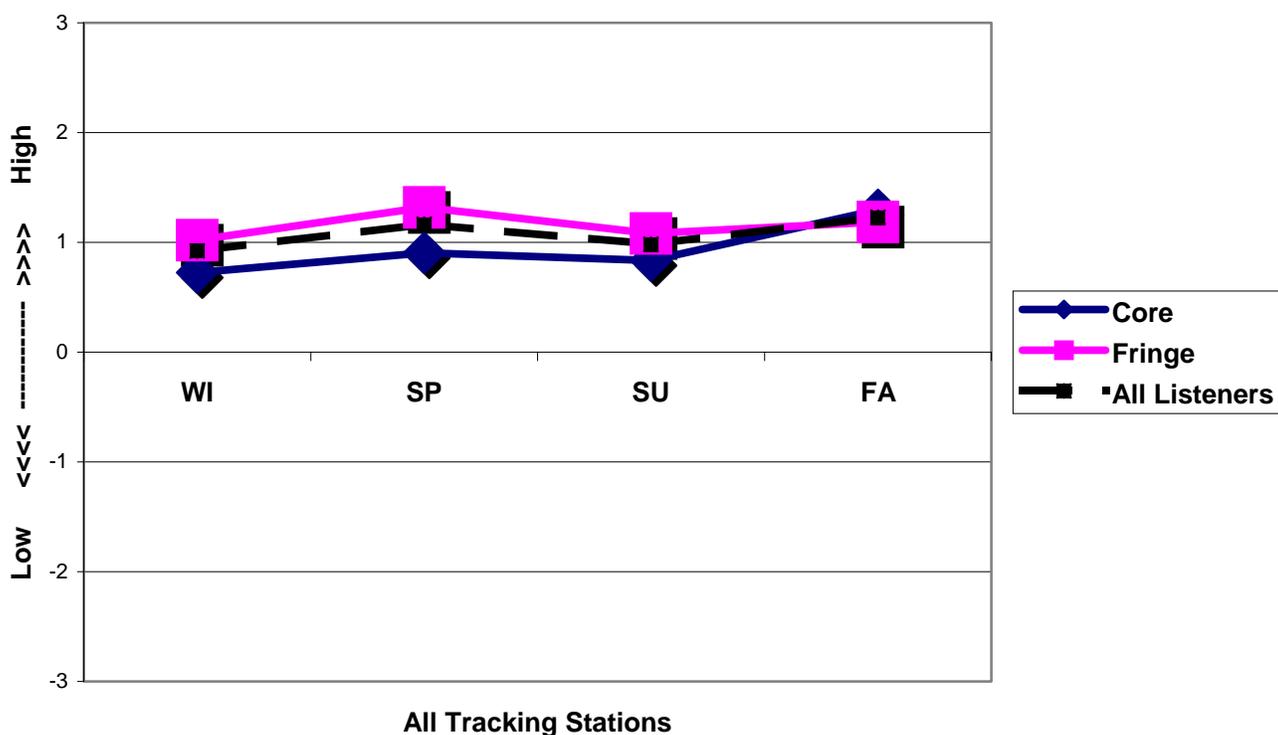
There was a six-point scale from strong agree to strong disagree.

All public radio listeners have been exposed to fund drives and underwriting, but not all have been reached by telemarketing.

The charts in this section show Telemarketing Annoyance scores we calculated for only those listeners who said that they actually have been telemarketed by a Tracking station.

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Telemarketing Annoyance by Core/Fringe



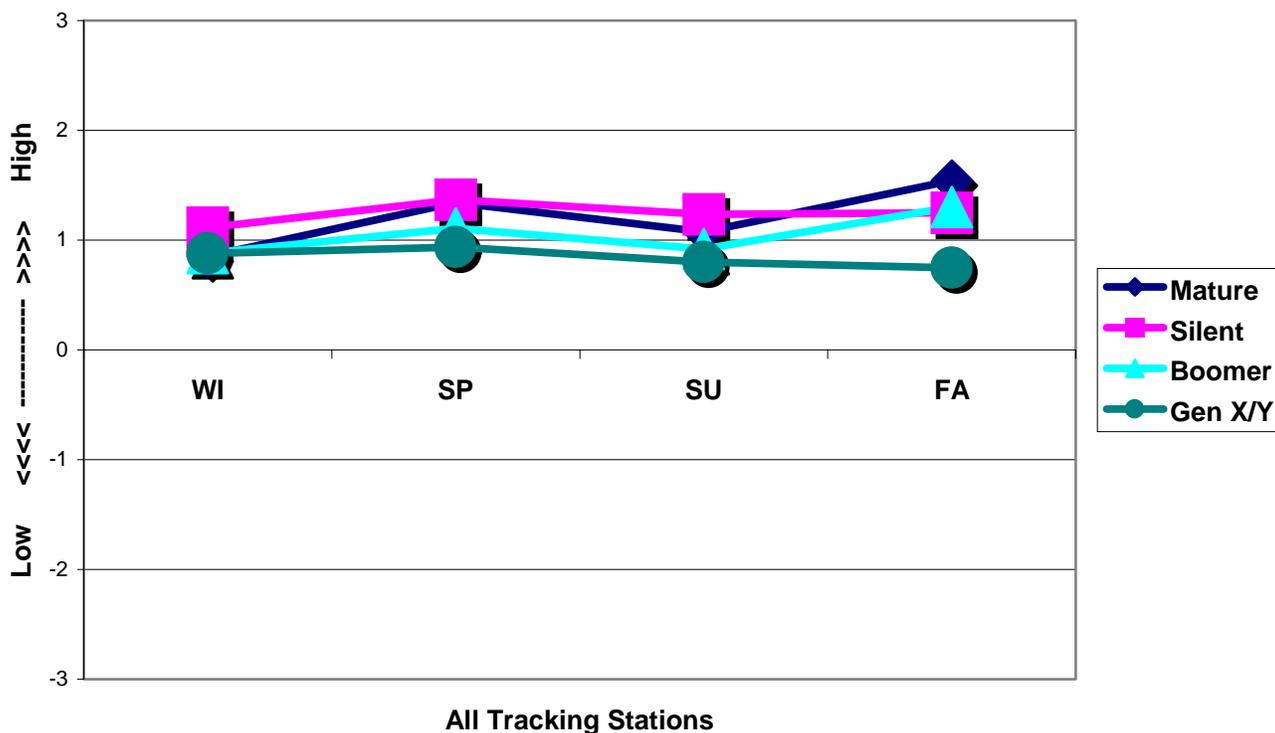
Most of our respondents expressed annoyance with telemarketing from public radio stations. Core and Fringe agree. Telemarketing annoyance was highest in Fall 1999.

This chart says nothing about the effectiveness of telemarketing. You will have to balance the income received with any damage that is done.

But our listeners are annoyed with any telemarketing that intrudes into their home, including telemarketing from public radio.

The Public Radio Tracking Study Walrus Research

Telemarketing Annoyance by Cohort



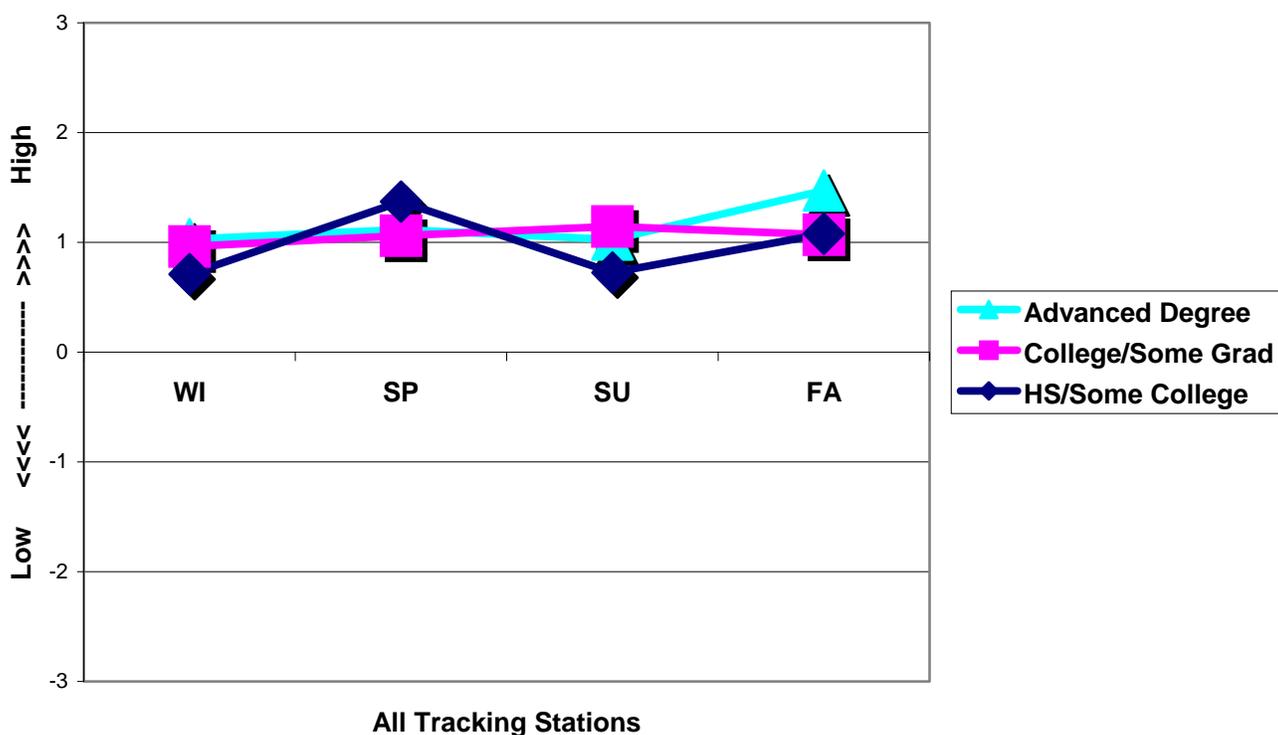
This chart shows Telemarketing Annoyance by generations within public radio's audience. In Fall 1999 we saw older Matures express the highest level of annoyance with telemarketing. Annoyance is also high among Silents and Boomers.

Depending on the lists you purchase or how you place your calls, you might be hitting one generation differently than others.

It's probably true that listeners in the Mature cohort are more likely than Gen Xers to be at home to take calls.

The Public Radio Tracking Study Walrus Research

Telemarketing Annoyance by Education



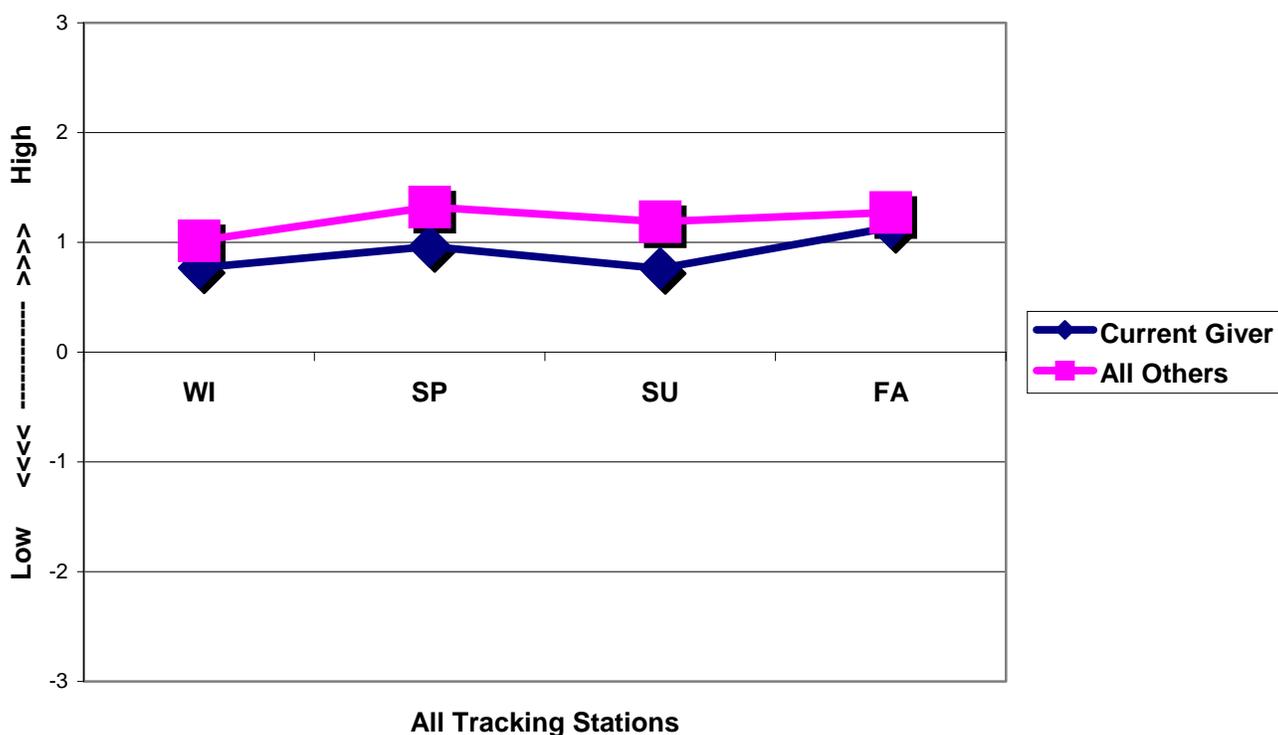
This chart shows Telemarketing Annoyance by levels of education within the public radio audience. In Fall 1999 we got the highest annoyance scores from listeners with advanced degrees.

Unfortunately, telemarketing is the most annoying to **our best prospects**.

Rising annoyance may eventually reduce the effectiveness of telemarketing. People just don't answer the phone in the evening.

The Public Radio Tracking Study Walrus Research

Telemarketing Annoyance by Givers



In Fall 1999 Telemarketing Annoyance rose among Current Givers. They became as just as annoyed as the non-givers.

We did not include any respondents who said they had never been telemarketed by a station. All of the listeners in the charts above reported that they have received telemarketing calls from public radio.

The Public Radio Tracking Study

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Direct Mail Acceptance

This section is about Direct Mail Annoyance, which turns out to be **Acceptance** of Direct Mail.

In 1999 we conducted 20 focus groups for the Listener Focused Fundraising project. We asked public radio listeners in 5 markets about various development activities including on air fund drives, underwriting credits, telemarketing and direct mail.

What we heard in those focus groups triangulated consistently with what we are finding in the Tracking Study:

On air:	Fund drives are annoying, underwriting is fine.
Off air:	Telemarketing is annoying, direct mail is fine.

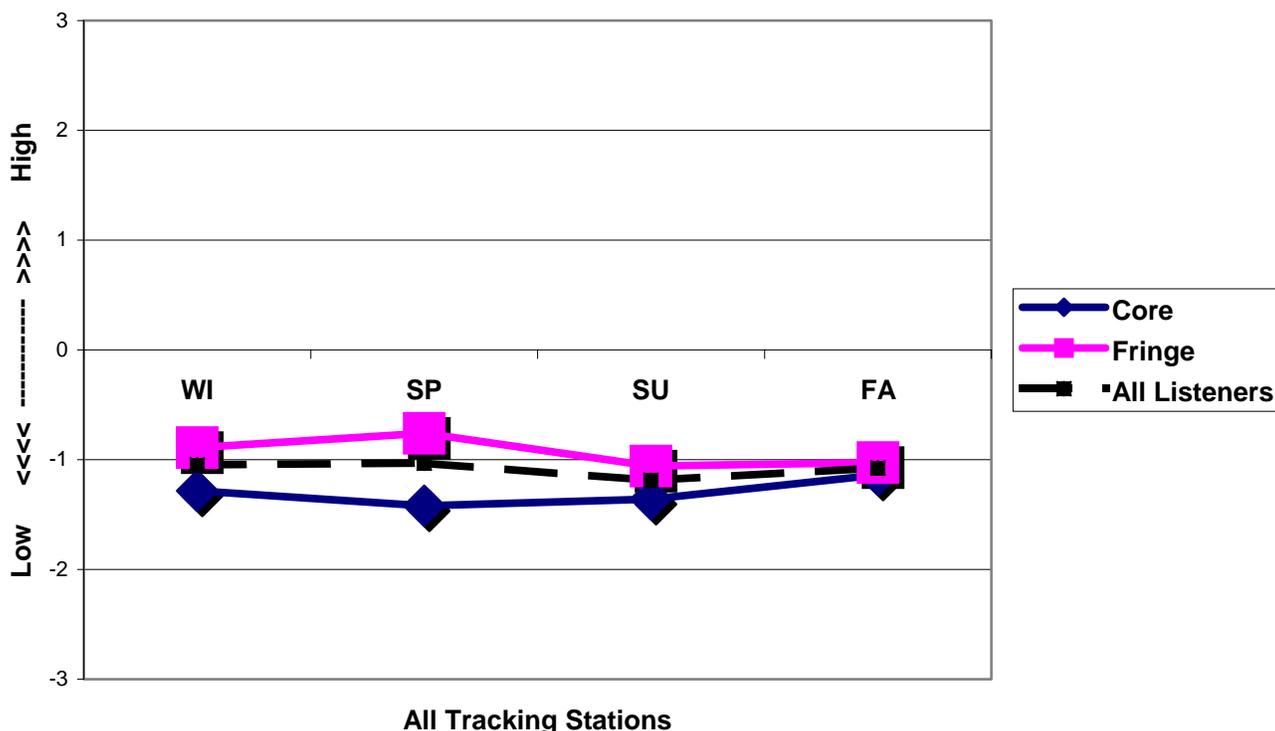
The following charts show responses from only those listeners who said they had actually received direct mail solicitations from a public station.

The question was written as follows:

The mailings I get at home from [station] asking for money are annoying to me.

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Direct Mail Annoyance by Core/Fringe



Across the 20 Tracking stations we found that respondents generally **disagreed** with the statement that direct mail was annoying.

In the focus groups we conducted for the Listener Focused Fundraising project listeners explained why they prefer direct mail. The many reasons included:

You can read and answer direct mail at your own convenience.

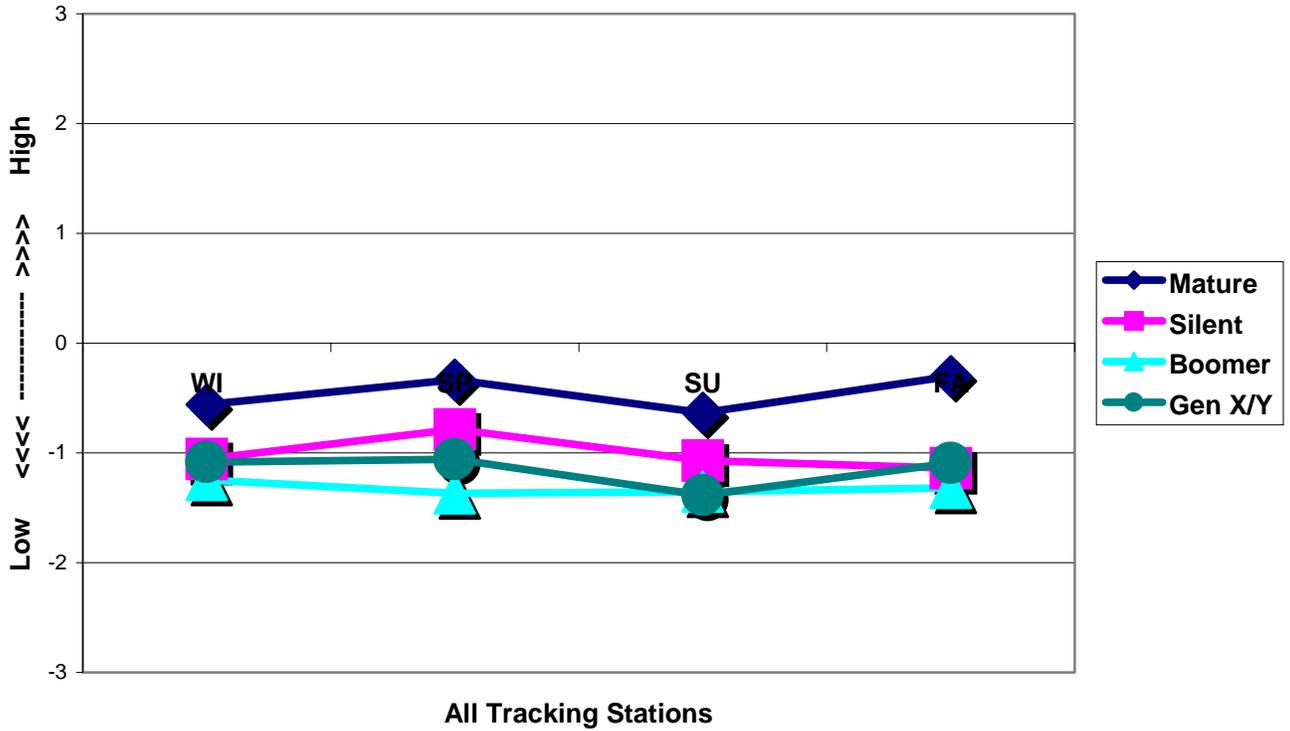
You have time to think about what you read.

A well-written piece is more literate and intelligent than a call from a telemarketer (who probably does not listen to public radio.)

So we ought to be talking about Direct Mail Acceptance not Annoyance.

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Direct Mail Annoyance by Cohort



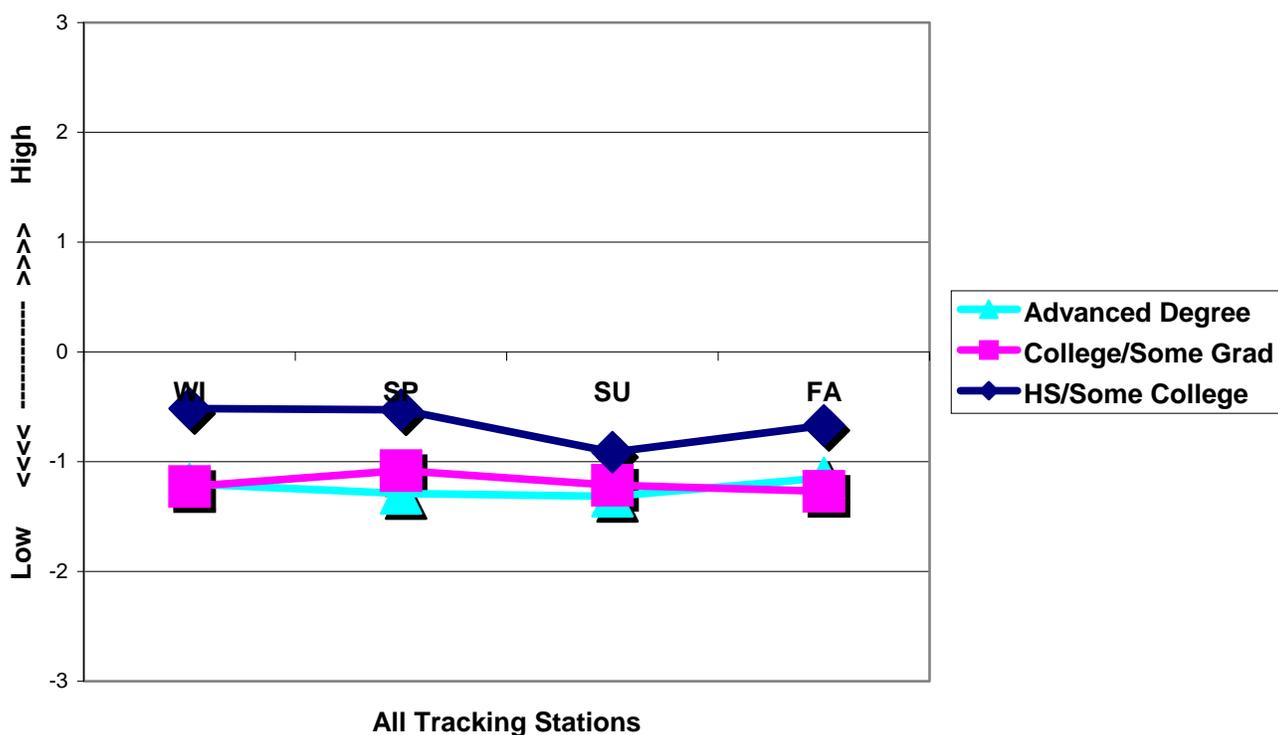
The older Matures may be somewhat cranky about direct mail from public radio. Their annoyance score is closer to neutral.

Recall that Matures are also the most annoyed by telemarketing.

We found that Silents, Boomers and Gen Xers are equally accepting of direct mail solicitations from public radio.

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Direct Mail Annoyance by Education



In the LFF focus groups we heard **highly educated** respondents say that they would be happy to receive a mailing – even a renewal notice – if it came from their local station.

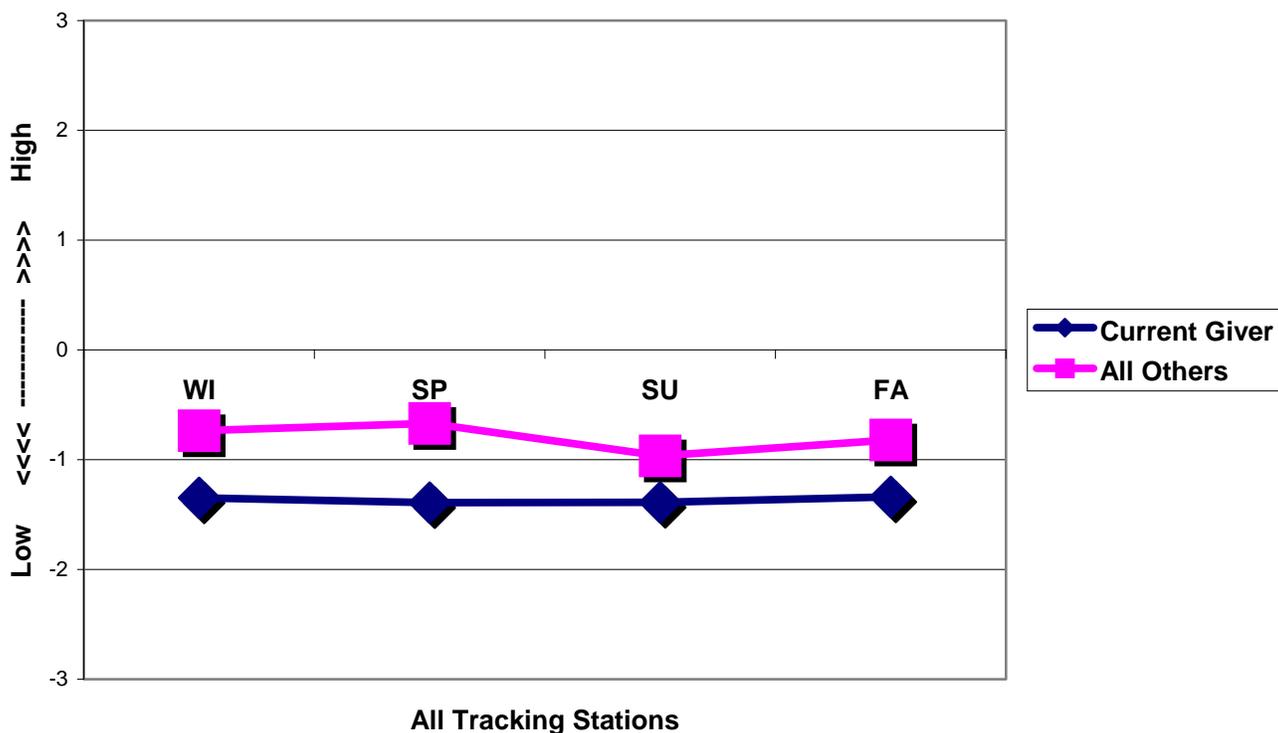
They said they would open an envelope that had the station’s call letters up in the corner, or even better a letter from “NPR.”

Think about how all of this fits together: Public radio programming is less valuable to listeners who did not graduate from college. They are less loyal to public radio. They use a lot of commercial radio.

So what would those high school graduates think about a direct mail piece from your station asking for money?

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Direct Mail Annoyance by Givers



Current Givers are more accepting than non-givers of direct mail from public radio. That may seem to be somewhat circular. But in the LFF focus groups the givers said “just send my renewal notice in the mail.”

The Tracking Study has not yet asked about the Internet as a channel for public radio fundraising. We may be able to add questions about Internet giving as the Tracking Study continues.

The Public Radio Tracking Study

Walrus Research

Listener Support Beliefs

Audience 98 discovered a Stairway to Giving. First, you must listen to public radio. Another step is Personal Importance – the programming must be important in your life. Then there is the step involving what you believe about the funding of public radio.

The Tracking Study included two questions about funding beliefs:

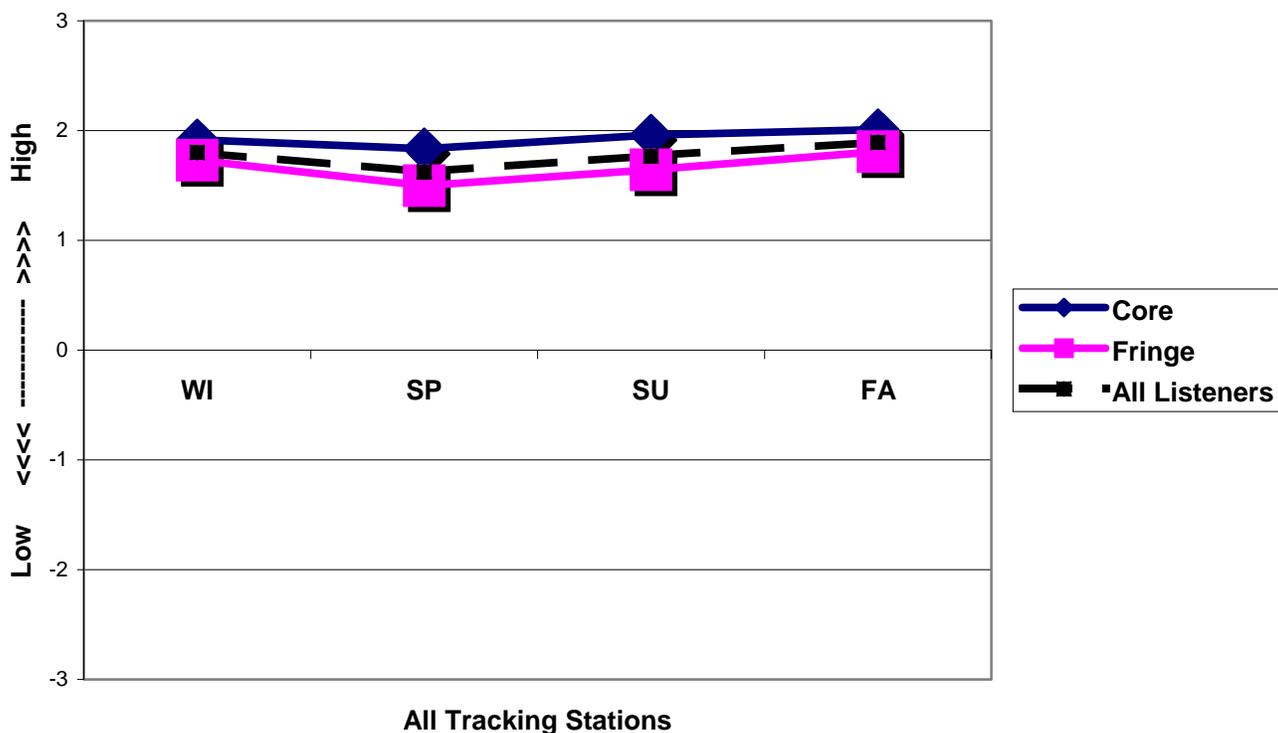
I generally think of public radio as being financially supported by contributing listeners.

I generally think of public radio as being financially supported by universities or government tax dollars.

Listeners who have the “correct” beliefs are more likely to send money.

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Believe that Listeners Fund by Core/Fringe



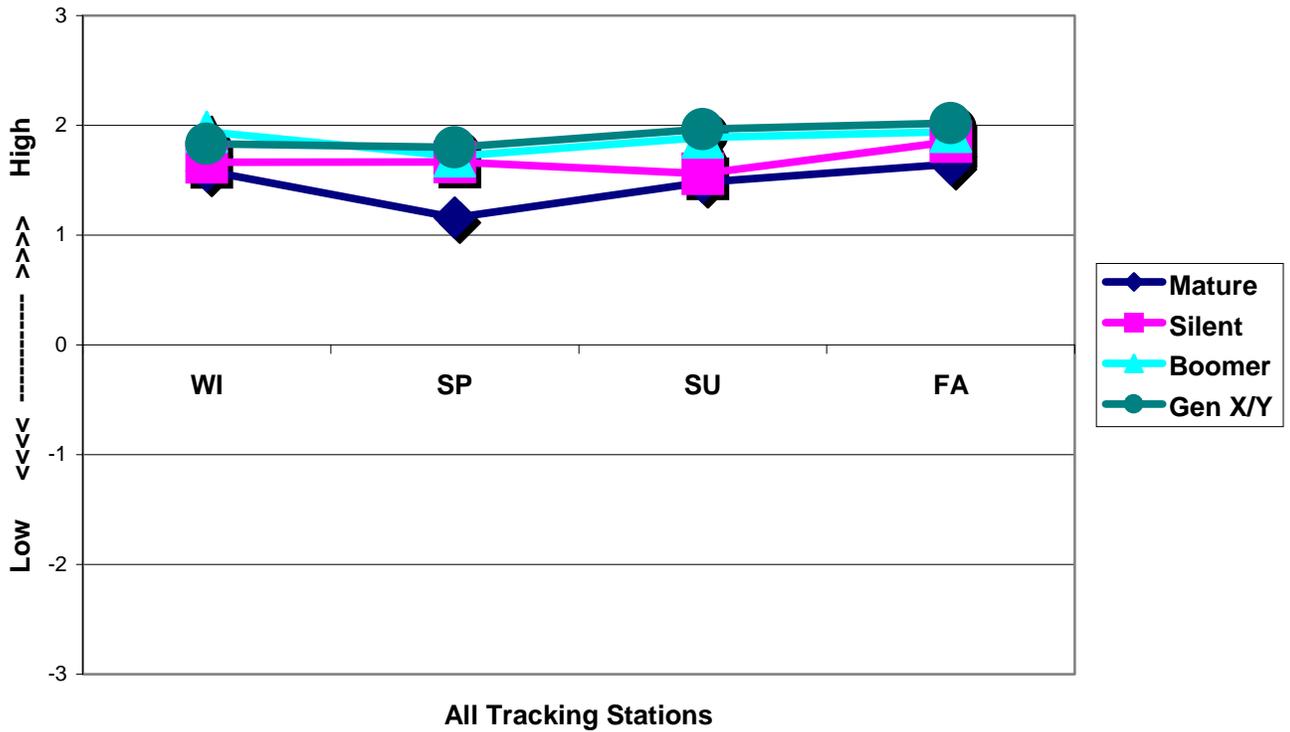
We found high levels of the “correct” belief that *listeners financially support* public radio. That is very good news. The scores are high and holding up there for both Core and Fringe listeners.

From a marketing perspective, we definitely want listeners to believe that public radio depends on their support.

On this chart, up is good!

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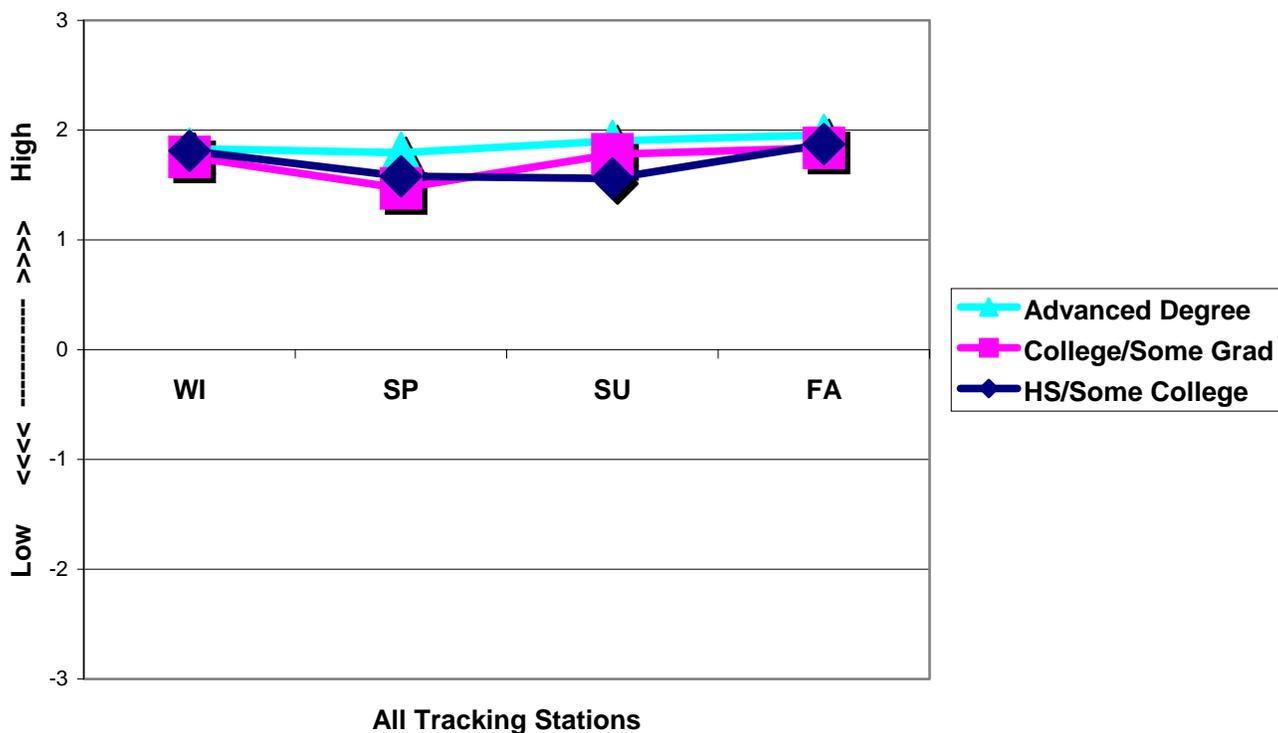
Believe that Listeners Fund by Cohort



We want all generations in the public radio audience to believe that listener support is vital for public radio stations. That belief is strongest among Xers and Boomers.

The Public Radio Tracking Study Walrus Research

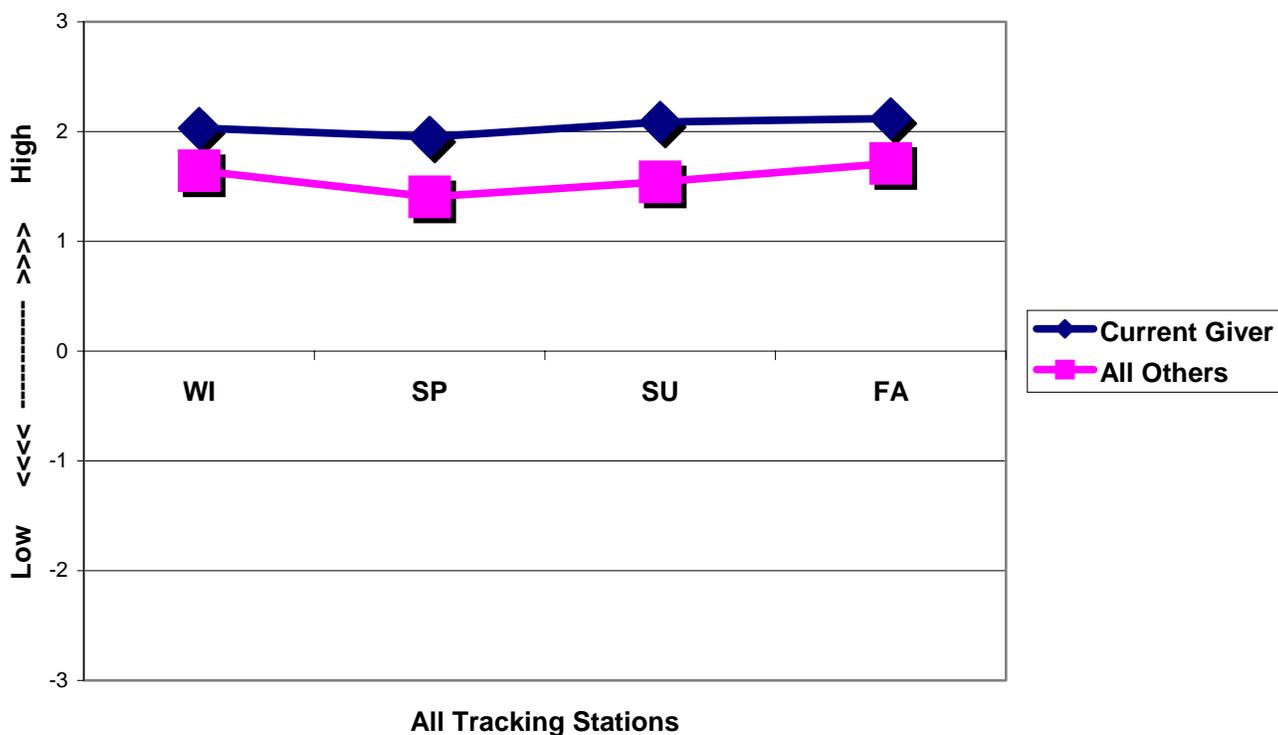
Believe that Listeners Fund by Education



This chart shows no difference by level of education. The high school graduates in our audience understand that listeners support public radio, along with the college grads.

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Believe that Listeners Fund by Givers



This chart triangulates with Audience 98's Stairway to Giving. It shows that the "correct" belief separates givers from non-givers.

One reason why givers send money is that they have stronger beliefs that public radio is listener-supported.

Stations have to remind all listeners of the importance of listener support.

The good news is that by Fall 99 both givers and non-givers were moving in the right direction on this chart.

The Public Radio Tracking Study

Walrus Research

Government Support Beliefs

The next charts show whether listeners think that government is supporting public radio. Here is the question again:

I generally think of public radio as being financially supported by universities or government tax dollars.

Note that we did not ask whether the government ought to support public radio. The question is their perception of the financial reality.

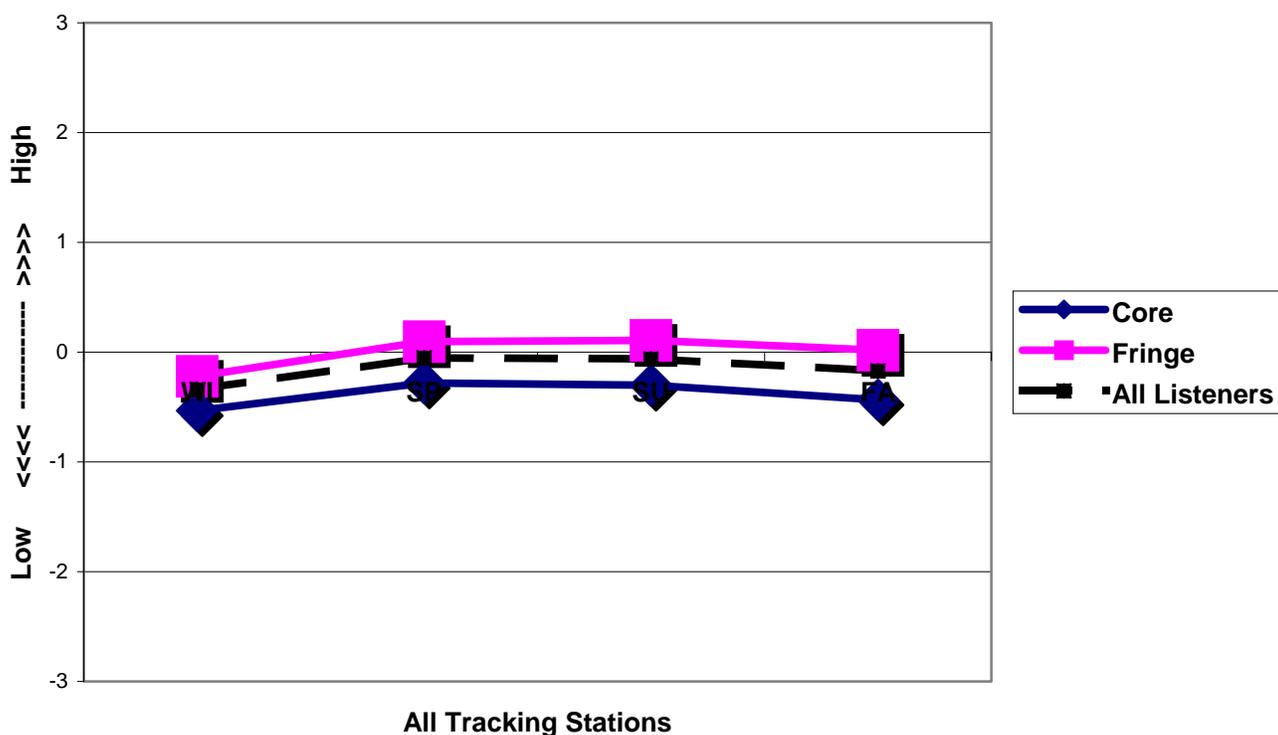
We found that the two funding belief questions are not mutually opposite.

- Plenty of public radio listeners believe that both listeners and government support public radio.
- In focus groups we learn that many are confused about the relative percentages of listener vs government support.

These perceptions predict giving.

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Believe that Government Funds by Core/Fringe



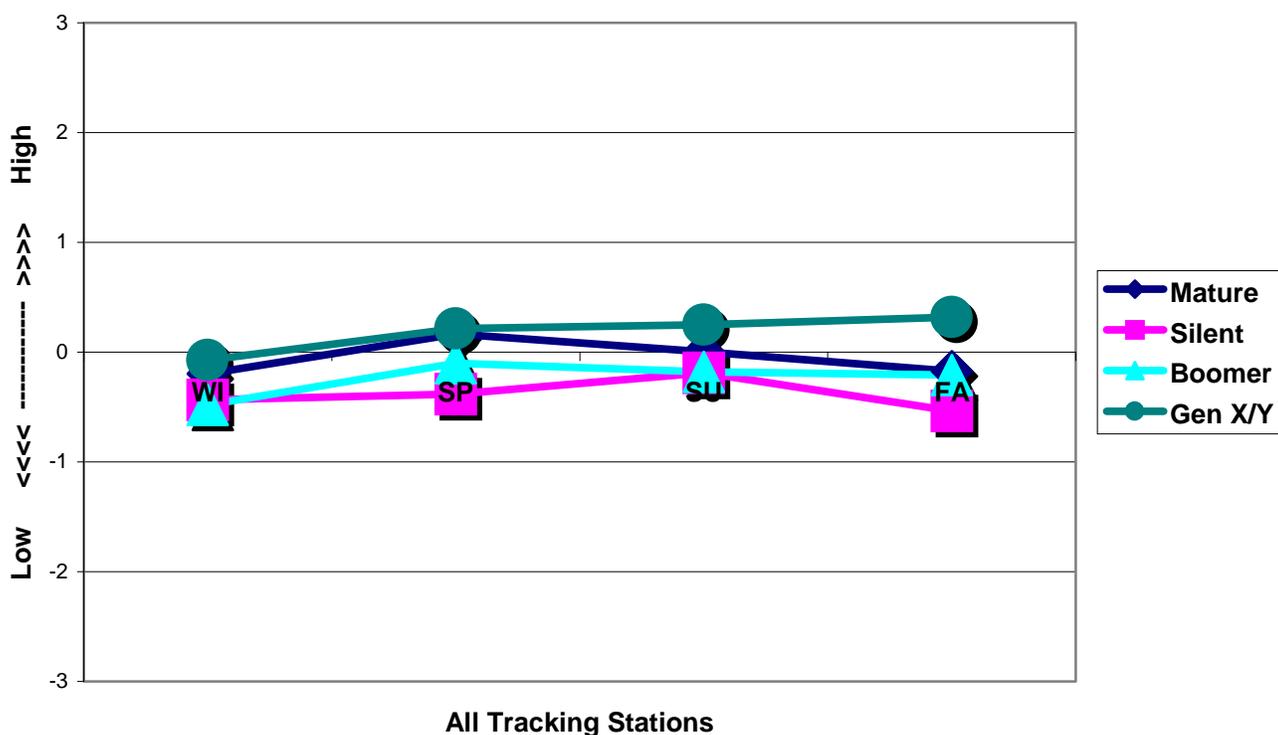
The Tracking line is running at neutral zero on this agree/disagree scale.

That indicates a vague or ambivalent opinion. Respondents tell us that they think the government is still providing some support, but they are not sure how much. They know that many stations are based at state-funded universities.

On this chart, up is bad. Down is good because belief that government supports public radio is another reason not to give.

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Believe that Government Funds by Cohort



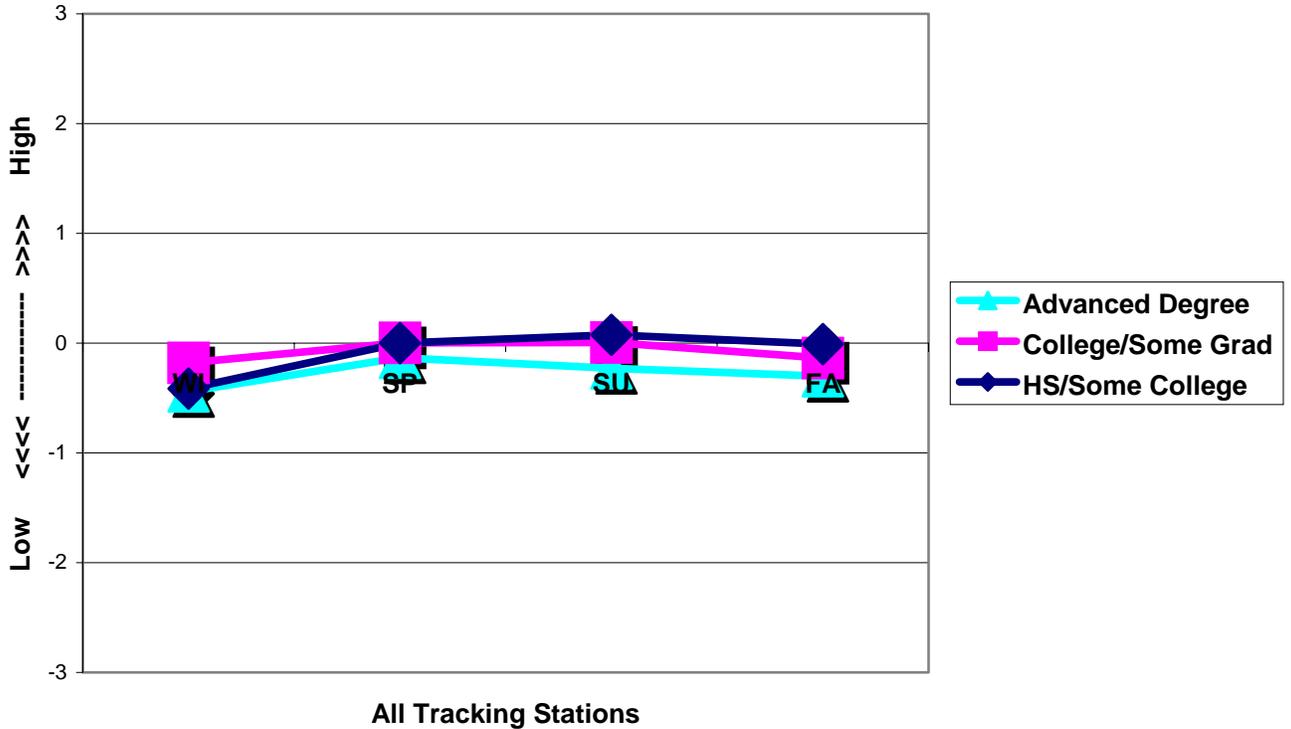
This chart shows that generations are similar in their beliefs relative to government funding of public radio.

We would like to see all four cohorts move further down on this chart.

It appears that Gen Xers especially need to be persuaded that government support is minimal for public radio.

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Believe that Government Funds by Education

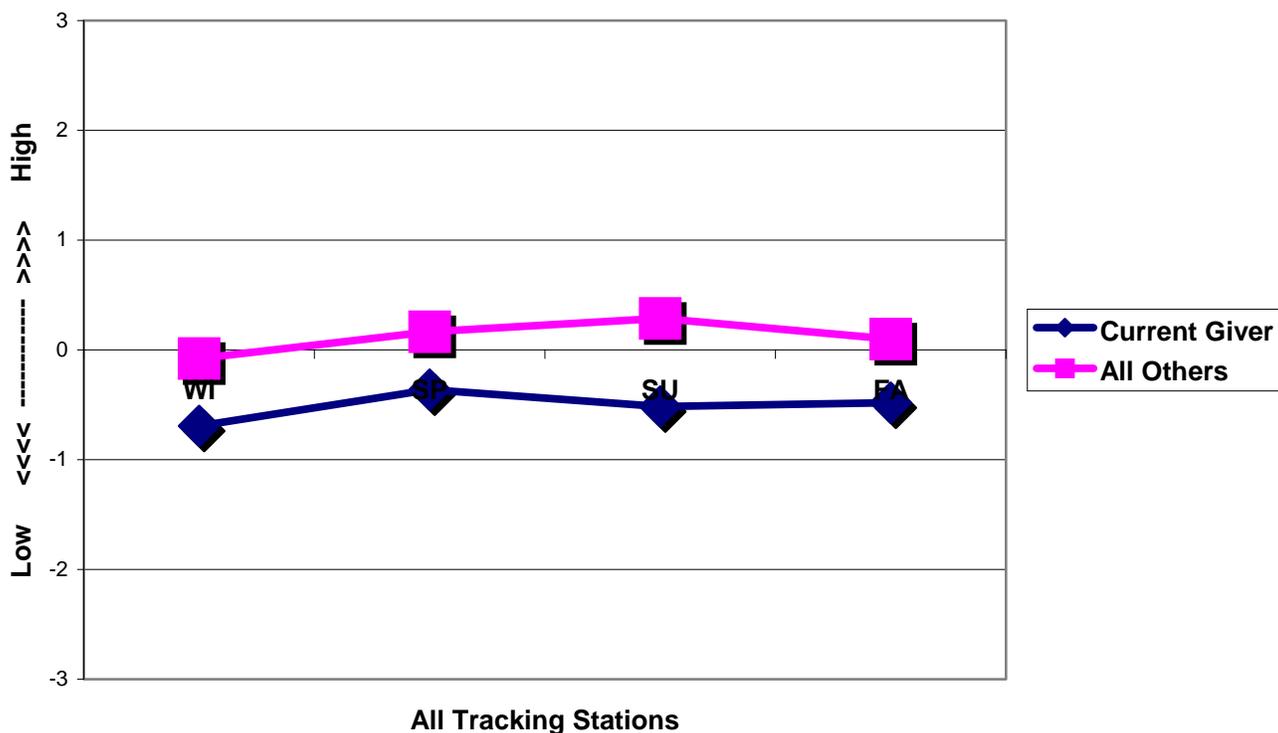


As we saw for the listener-support belief, education is not a major factor in the belief about government funding of public radio.

Again, down is the right direction on this chart.

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Believe that Government Funds by Givers



Here you see a separation between Current Givers and All Others that illustrates the relationship we have been talking about in this section.

- Current Givers tend to think that government does not provide much support for public radio.
- One of the reasons that non-givers do not give is because they think that government is paying for public radio.

Keep in mind that the major predictors of giving are Core listening and a sense of personal importance. But it also helps if listeners have the “correct” beliefs with reference to government vs listener funding.

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Vector of Listening

Arbitron does not provide truly longitudinal data. Each listener keeps a diary for one week. The diary-keepers from one quarter do not return to keep diaries in the next quarter.

No one knows whether a diary-keeper from Summer was still listening to that same station when Fall came along. Or whether a listener who was Fringe in one sweep upgraded to Core in the next sweep.

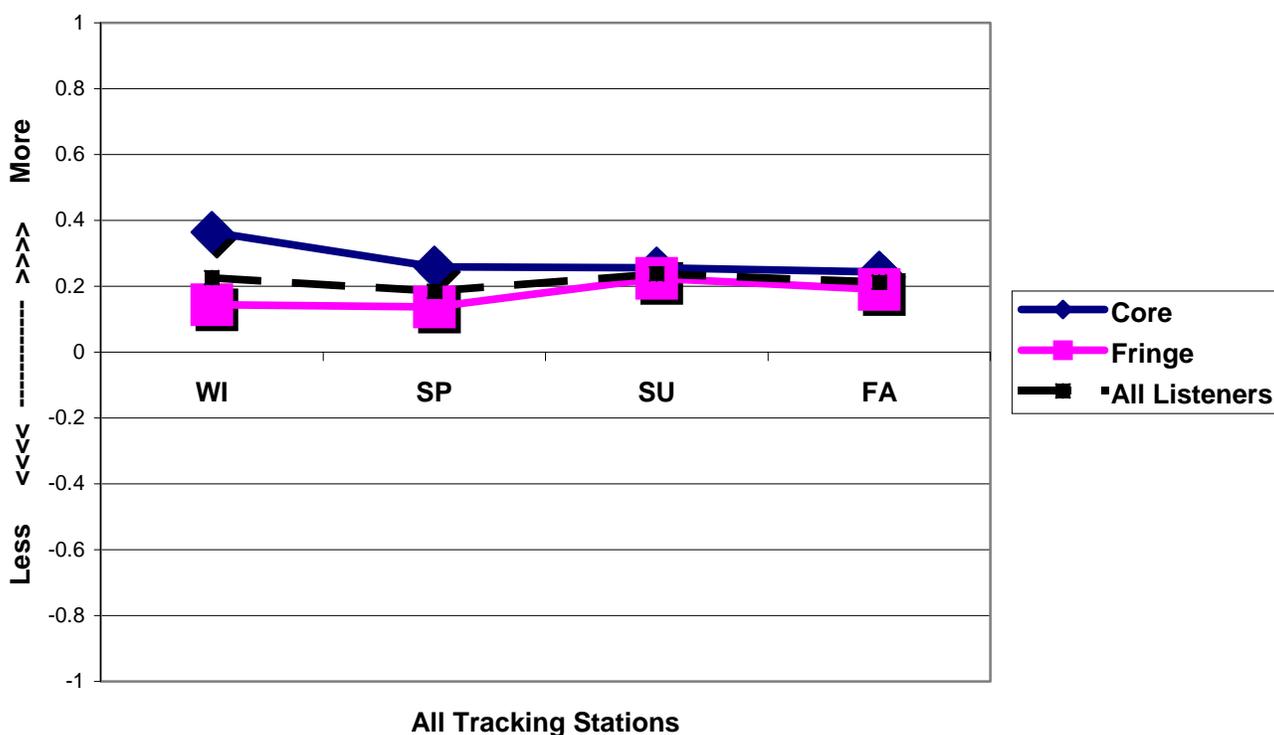
In the Tracking Study we asked public radio listeners to provide their own longitudinal data by responding to this question:

Thinking back over the last year, would you say that you are listening to [station] much more, somewhat more, about the same, somewhat less or much less?

We call these Vectors of Listening. **A vector is an arrow** pointing the direction you are headed.

The Public Radio Tracking Study Walrus Research

Vector of Listening by Core/Fringe



We found some churn within the public radio audience. Some listeners are listening more, while others are listening less. But on average the result is a bit positive because there are more listeners who are listening more than listeners who are listening less.

Across the Tracking stations the average Vector of Listening was in the positive zone but just barely.

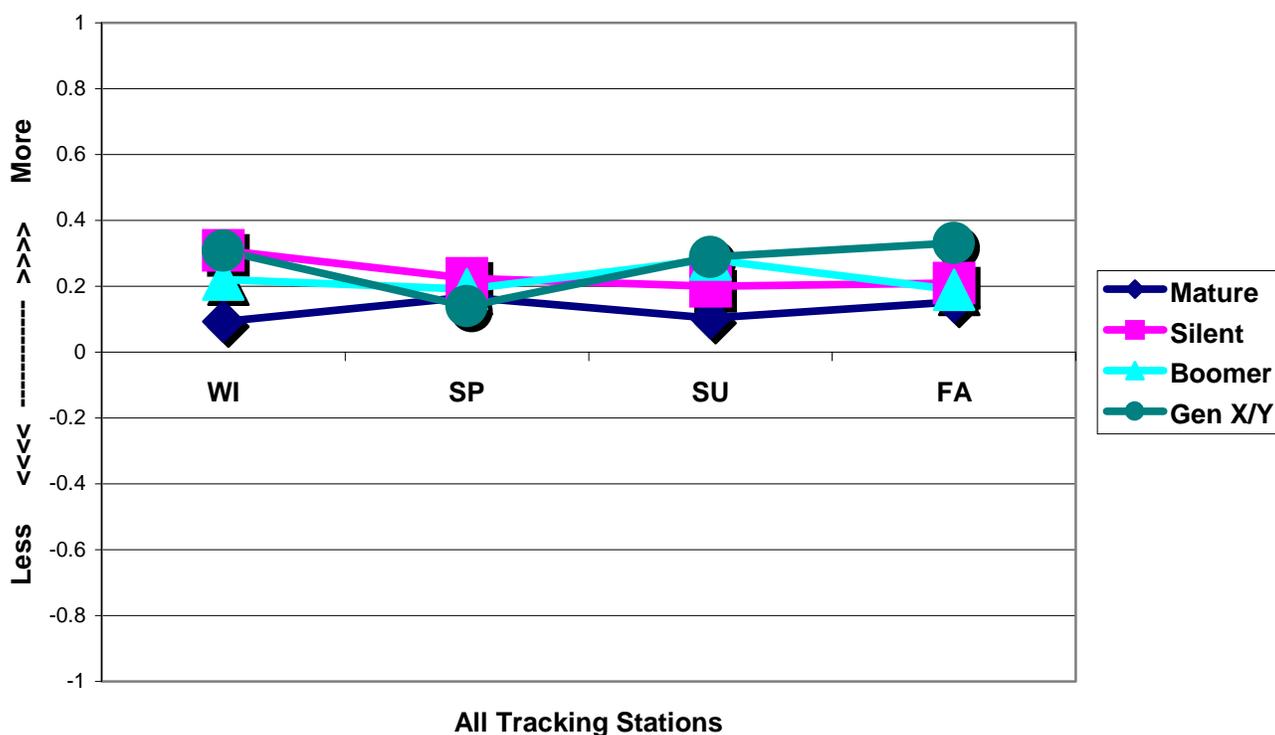
On this chart, up is good. But the scale is an extreme close up.

Look carefully at the vertical axis on this chart. No change would be the zero line. The aggregate Tracking line is just barely above zero.

Most public radio listeners by their own recall think that they are using public radio about the same as a year earlier.

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Vector of Listening by Cohort



If listening to public radio is a Cohort effect, the public radio audience will age along with the NPR news anchors.

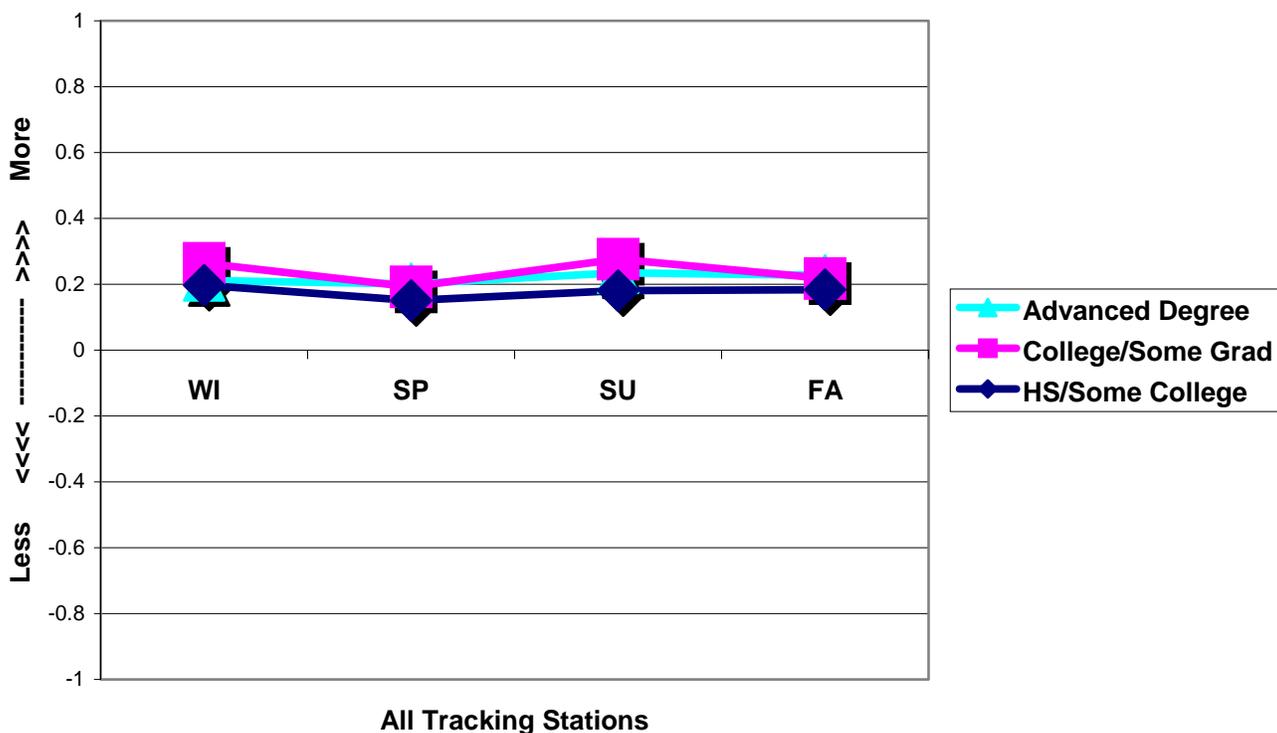
Each public radio manager is hoping that Gen Xers will increase their use of public radio as they move into middle age.

This chart shows mildly positive Vectors of Listening by all four generations within the public radio audience.

The good news is that Gen Xers are using more public radio. Of course, they still use much less public radio than our older listeners.

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Vector of Listening by Education

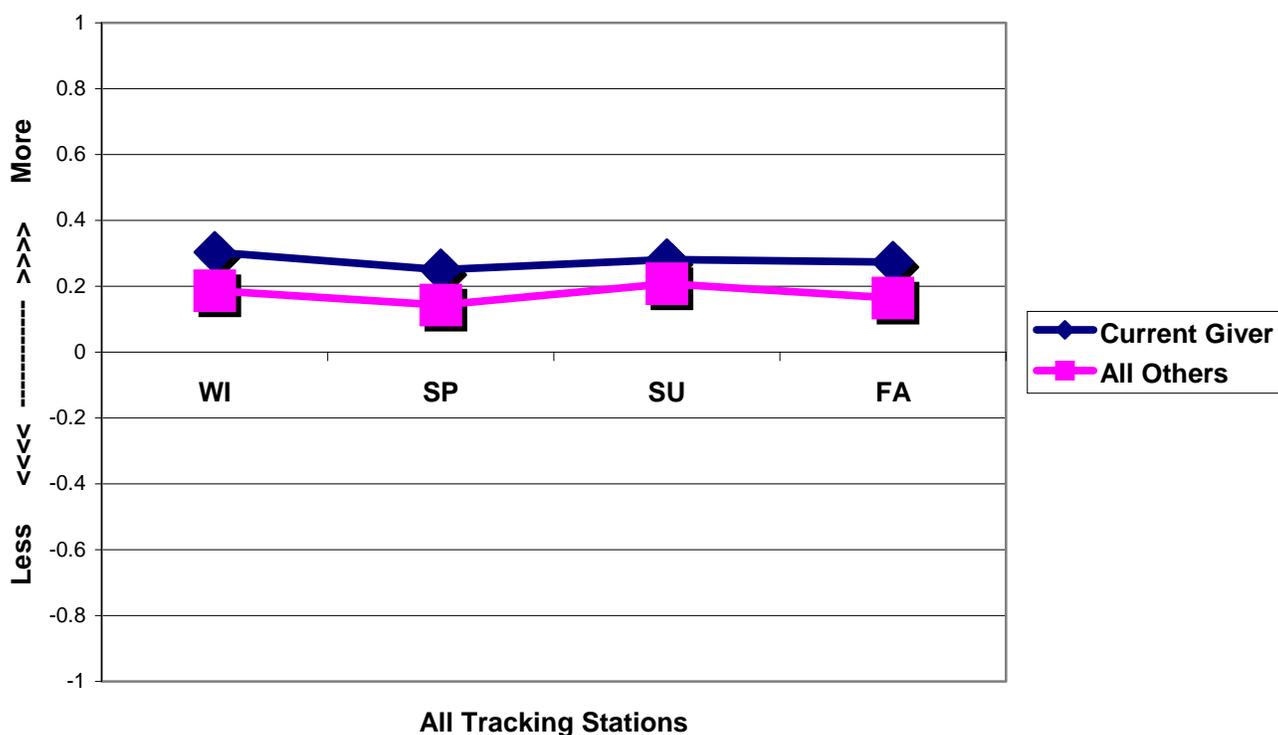


This chart shows Vectors of Listening by level of education within the public radio audience. There is no difference between segments.

Keep in mind the fine detail of the vertical axis. We are zoomed in real close for this picture. But all three levels of education are in the positive zone on this chart.

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Vector of Listening by Givers



This is Vector of Listening by Current Givers vs All Others in the audience.

Givers and non-givers report that they are listening more to public radio, with the givers somewhat higher.

This is a self-reporting question. Their actual usage might be different.

Also, since we know that TSL to radio is dropping, they might be telling us that they are using public radio more **relative to commercial radio**.

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Vector of Giving

The final section of this report is Vector of Giving. It is a longitudinal measure just like Vector of Listening.

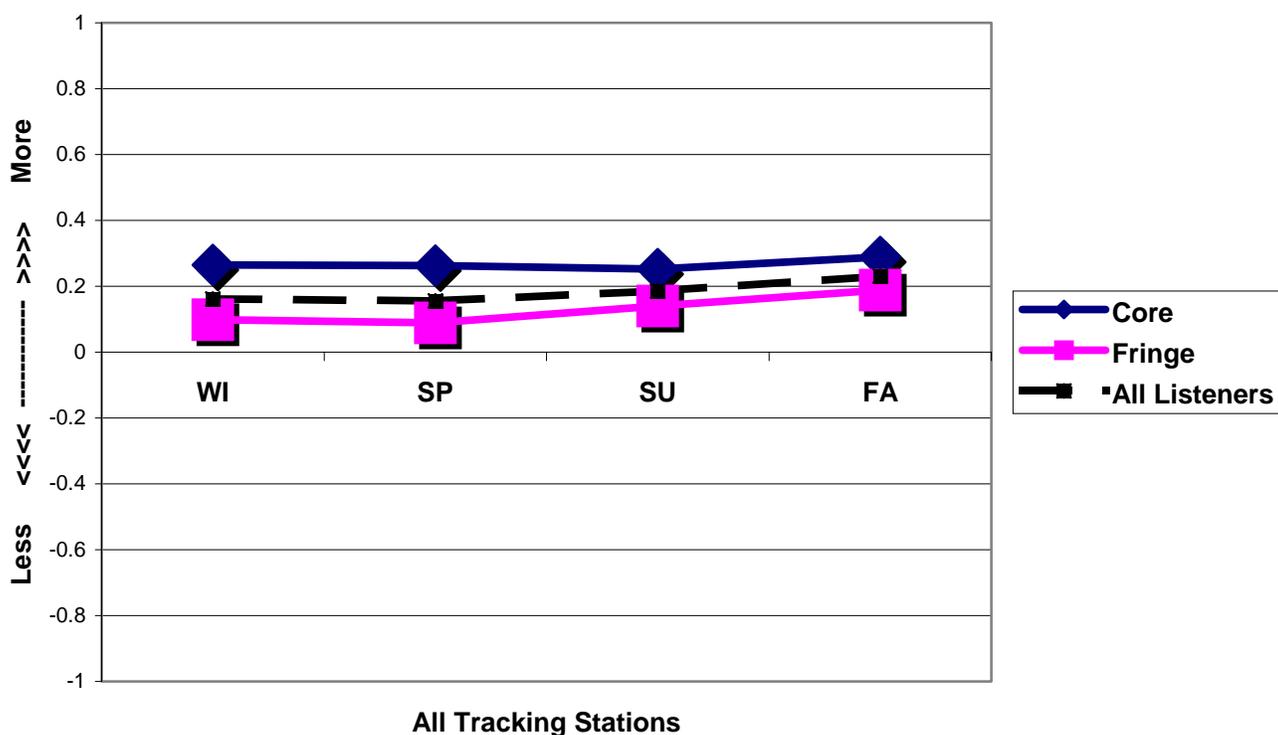
Here is the wording:

Think about your attitude towards giving money to support [station.] Over the past year has your attitude towards giving become much more positive, somewhat positive, about the same, somewhat negative or much more negative?

Note that this question is about attitude, not behavior. We are interested in their predisposition to give money.

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Vector of Giving by Core/Fringe

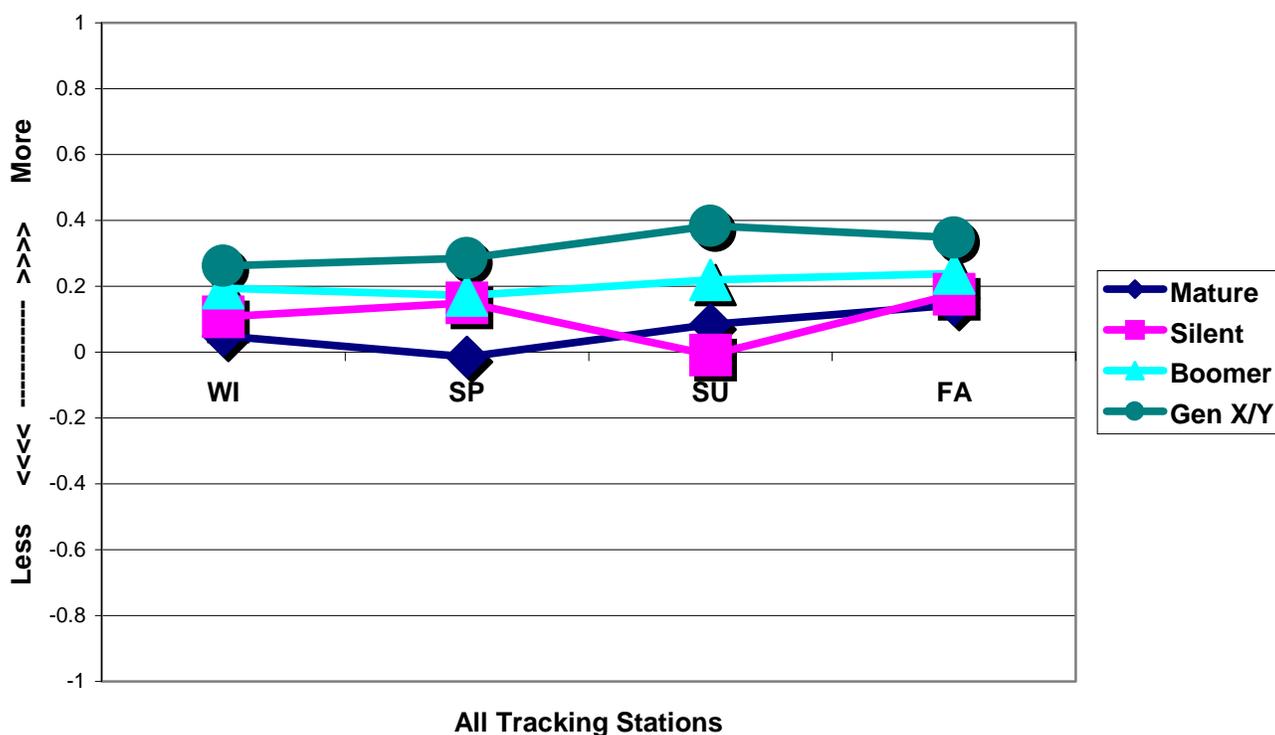


The dashed line is the aggregate for all listeners. That line is creeping upward. There are more people who are feeling more positive about giving to public radio, which is good!

On average, both Core and Fringe listeners reported that they are feeling somewhat more positive about sending money.

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Vector of Giving by Cohort



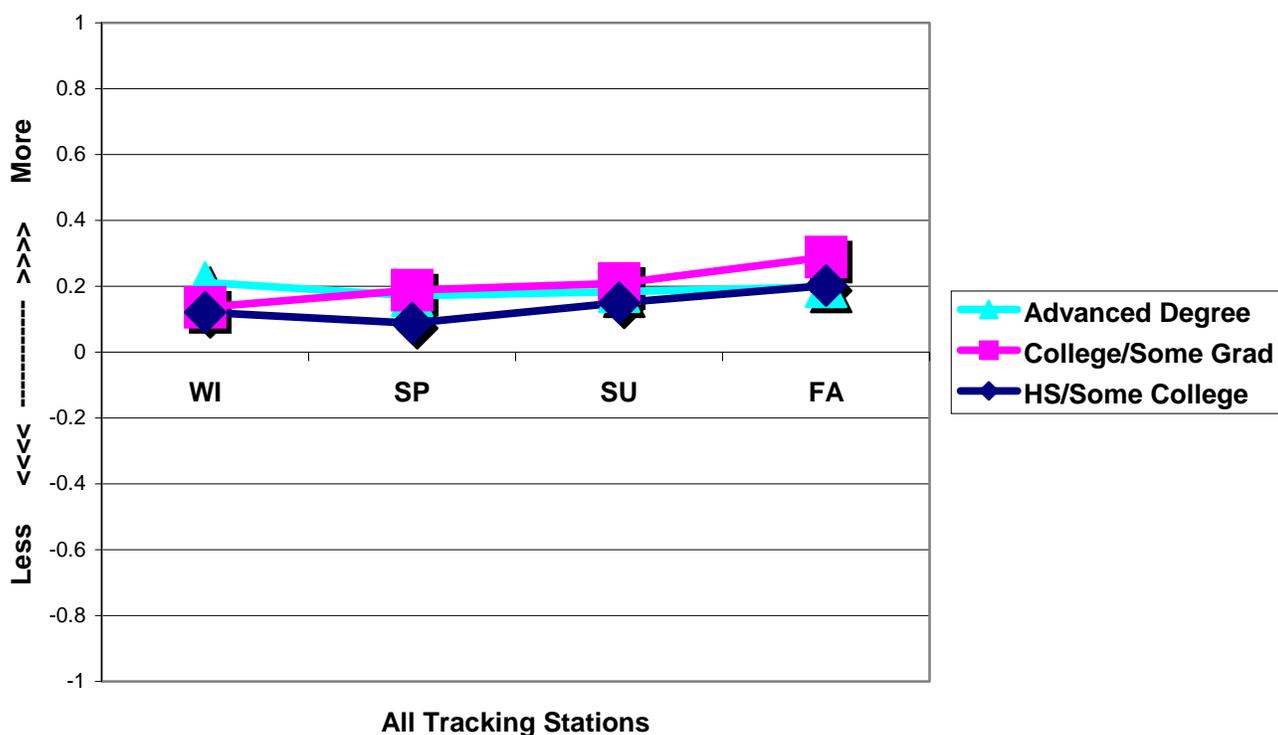
This chart shows Vectors of Giving by generations within the audience.

If a line is increasing, that Cohort is feeling more positive about giving to a public radio station. That is what we found among Gen Xers. They are moving in the right direction with reference to giving.

All of this fits together. Gen Xers said they are listening more, thus they are feeling more positive about giving to public radio.

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Vector of Giving by Education

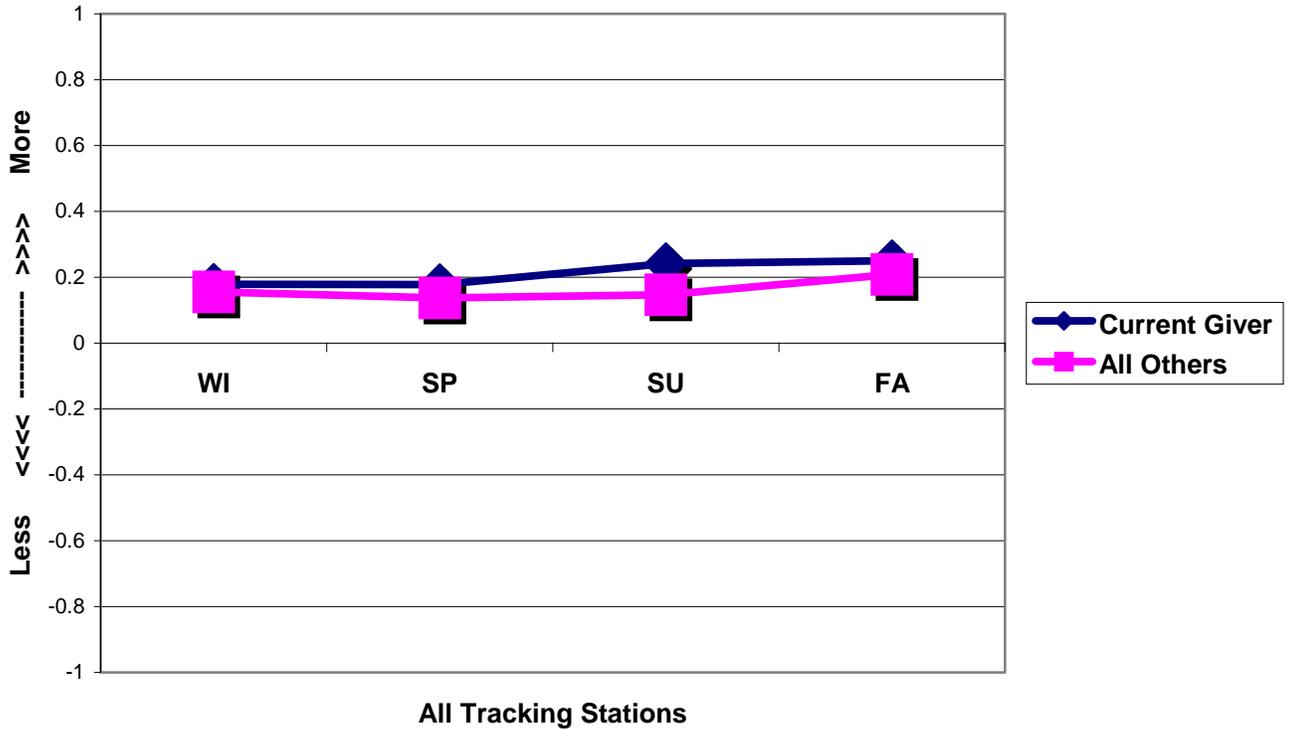


This chart shows Vector of Giving by level of education.

The three lines track each other closely. Even the high school graduates are feeling more positive about giving compared to the year before.

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Vector of Giving by Givers



This chart shows Vector of Giving by Current Givers vs All Others.

Both givers and non-givers are feeling more positive about giving.

We appreciate your support of the Public Radio Tracking Study.

The Public Radio Tracking Study

Walrus Research

Notes on Method

In this section we address a few esoteric matters of methodology. If you trust us, skip this section. If you have further questions, let us know.

Statistical Weighting

Arbitron diaries are weighted by Persons Per Diary Value to project to the market population. When we recontact diary-keepers for the Tracking Study we achieve about 66 percent cooperation. So we re-weight the PPDVs for completed interviews up to the market population.

That way we are projecting the listening data in our recontact interview to an established parameter – the station’s audience according to Arbitron.

Current vs Lapsed Givers

Stations maintain membership databases for their internal accounting. A member will be tagged as current or lapsed based on the station’s calendar. However, we know from several studies over the years that the station’s records do not necessarily match the member’s own estimation.

A member may consider himself to be current – based on his mental accounting – although the station has him listed as lapsed.

We asked the giving question two different ways. Here is the version we used in Winter, Spring and Summer 1999:

Think about whether you or anyone in your household ever gave money as a contribution to support [station.] Which of the following statements best represents your household’s most recent contribution to [station.]?

We contributed in 1999.

We most recently contributed in 1998.

We most recently contributed in 1997 or before.

We have not contributed money to [station.]

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We wrote a different version of the giving question for Fall 1999:

Public radio stations often ask listeners for financial support. You may or may not have given money as a contribution to support [station.] Thinking back over the last 12 months, did you or anyone in your household give money to support [station.]?

By comparing the two questions we determined that “the last 12 months” in the mind of the listener might mean 18 or more months in the station’s membership database.

In our previous reports we used the term “Current or Recent” for the active segment of givers (1999 or 1998.) In Fall 99 we began using the term “Current Givers” for any who said they gave in the last 12 months. For trends we equated both definitions.

Giving by Households

A major theoretical and practical issue for public radio is how to reconcile listening by individuals with giving by households. Most often the stations receive a single pledge per household, yet we count individual listeners in the Arbitron ratings. The Public Radio Tracking Study employs a complex algorithm to reconcile listening and giving by households.

LISTENERS PER HOUSEHOLD: In the PRTS data set, there’s an average of 1.29 public radio listeners per household, essentially the same as AUDIENCE 98. This can **not** be interpreted as 1.29 persons per public radio household, and there can be people in the household that do not listen to public radio.

RECONCILING & APPORTIONING HOUSEHOLD GIFTS

1. When more than one person in a household reports giving to the station, we average all reported gift amounts and reconcile into a single household gift. When a person in the household does not report a gift amount while others in the household do, we assign the average of reported gifts in that household.
2. We apportion the reconciled household gift equally across all QHs of listening to the station (or to the two consolidated stations).

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3. Unlike AUDIENCE 98, we are leaving the Q12/Q20 response alone, so part of the reconciled and apportioned household gift may be attributed to a Current member, while at the same time part is attributed to a Recent and/or Lapsed member, for example.

4. So for instance:

Person 1 reported \$100 gift; listened to Stn.A 10 qhs, to Stn.B 10 qhs

Person 2 reported \$140 gift; listened to Stn.A 5 qhs, not to Stn.B

Person 3 reported \$120 gift; listened to Stn.B 15 qhs, not to Stn.A

Step 1: Reconcile by averaging three gift amounts = $\$360/3 = \120

Step 2: 40 QHs of listening across the two consolidated stations.
This makes each QH worth $\$120/40 = \3 .

Step 3: Apportion to each Person/Station by multiplying \$/QH times QHs; e.g.

Person 1 gave \$30 to A, \$30 to B

Person 2 gave \$15 to A

Person 2 gave \$45 to B