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Mega Trends

The Public Radio Tracking Study Special Report

George Bailey
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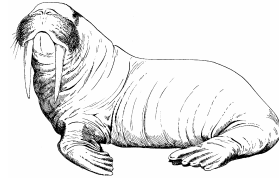
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Walrus Research

Mega Trends

The Public Radio Tracking Study

Special Report

Fall 2003

Reality has a way of eventually getting your attention

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The Public Radio Tracking Study

Introduction

Mega trends are like global warming—gradual but relentless, fundamental.

In this report we track mega trends in radio use by public radio listeners, especially those trends that we know are predictive of listener support.

This is the third Special Report from the Public Radio Tracking Study. We build on two previous reports, both on the relationship between public service and public support: *Turning Listeners into Givers* and *Heavy Givers*.

Following in the tradition of *Audience 98*, the Public Radio Tracking Study is the largest recontact study ever conducted for public radio. From Winter 1999 through Fall 2001, we recontacted over 30,000 public radio listeners who had kept Arbitron diaries so we could determine their attitudes and behavior with reference to listener support.

In addition, for this mega trend report, Audience Research Analysis provided National AudiGraphics trend data from 1995 through 2002.

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The Public Radio Tracking Study

Credits

The Public Radio Tracking Study was funded by 21 leading public radio stations, along with a first year challenge grant from the Corporation for Public Broadcasting. The funding stations were:

KCFR-FM	KQED-FM	WAMU-FM	WETA-FM	WPKT-FM
KJZZ-FM	KUHF-FM	WBEZ-FM	WGUC-FM	WUNC-FM
KOPB-FM	KUSC-FM	WBUR-FM	WKSU-FM	WUSF-FM
KPLU-FM	KUT -FM	WCPN-FM	WNYC-AM/FM	WXPB-FM

The Corporation for Public Broadcasting provided additional funding for a series of Special Reports from the Public Radio Tracking Study. Accordingly, this report is freely available for any publication. Download electronic copies of this and other national research studies from WalrusResearch.Com.

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The Public Radio Tracking Study

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The Public Radio Tracking Study

Executive Summary

The Public Radio Tracking Study is the largest ever recontact study of public radio listeners. In this report we document the mega trends in listening that are predictive of giving to public radio.

- Overall radio use is decreasing among public radio listeners, but their loyalty to public radio is increasing as they use less commercial radio.
- By generational cohort, the Baby Boomers among public radio listeners are relatively light users of commercial radio, Matures are heavy.
- By level of education, public radio listeners with advanced degrees are relatively light users of commercial radio, high school grads are heavy.
- When listening to more than one station is included, public radio listeners now spend nearly half of their radio time with public radio.
- Baby Boomers and listeners with advanced degrees show the highest loyalty to public radio. High school grads are less loyal to public radio.
- The percentage of public radio listeners who are core to a station has risen dramatically, approaching 50 percent core composition.
- Even as public radio has attracted more listeners, the programming has become more important in their lives and perceived as more valuable.
- The growth trends in listening and loyalty to public radio are due to acquired rather than local programming, news talk rather than music, and NPR news rather than local classical music.

The potential for listener support of public radio continues to grow as listeners have become more reliant upon public radio's service and perceive even greater value, especially with reference to the network news and information programs.

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The Public Radio Tracking Study

Predictors of Giving

This report builds on two previous reports, so we begin with a brief review.

Turning Listeners into Givers presented a statistical model that predicts which public radio listeners will become givers.

- We confirmed that public radio givers can be predicted primarily from patterns of listening. Reliance may be measured by purely behavioral variables like loyalty to a public station and becoming a core listener.
- Personal importance is an internal realization. Individuals who not only listen but also sense that public radio has become important in their lives are more likely to become givers.

Heavy Givers built on the first report by explaining the critical differences between light, moderate and heavy givers.

- We confirmed that reliance upon public radio not only predicts which listeners become givers but also explains their level of giving. Givers with greater reliance upon public radio will give more money.
- By reliance upon public radio we mean behavior. Measures of listening like loyalty, time spent listening, core vs fringe and tune in occasions are predictors of which givers will give at different levels of giving.
- Personal importance is an internal realization that public radio has become valuable in a giver's life. As personal importance increases, the level of giving by that giver will increase.

Accordingly, in our third report we document the mega trends in public radio listening with reference to reliance and personal importance—measures that we know are predictive of listener support.

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The Public Radio Tracking Study

Radio Use by Public Radio Listeners

According to Arbitron, people are using less radio. Nationally, the average quarter hour level of Persons Using Radio has been dropping a fraction of a point per year for twenty years.

Analyzing national Arbitron data, the Radio Research Consortium reported that the average quarter hour level of radio use by the general USA population dropped from 18.2 percent in 1983 to 14.6 percent in 2003.

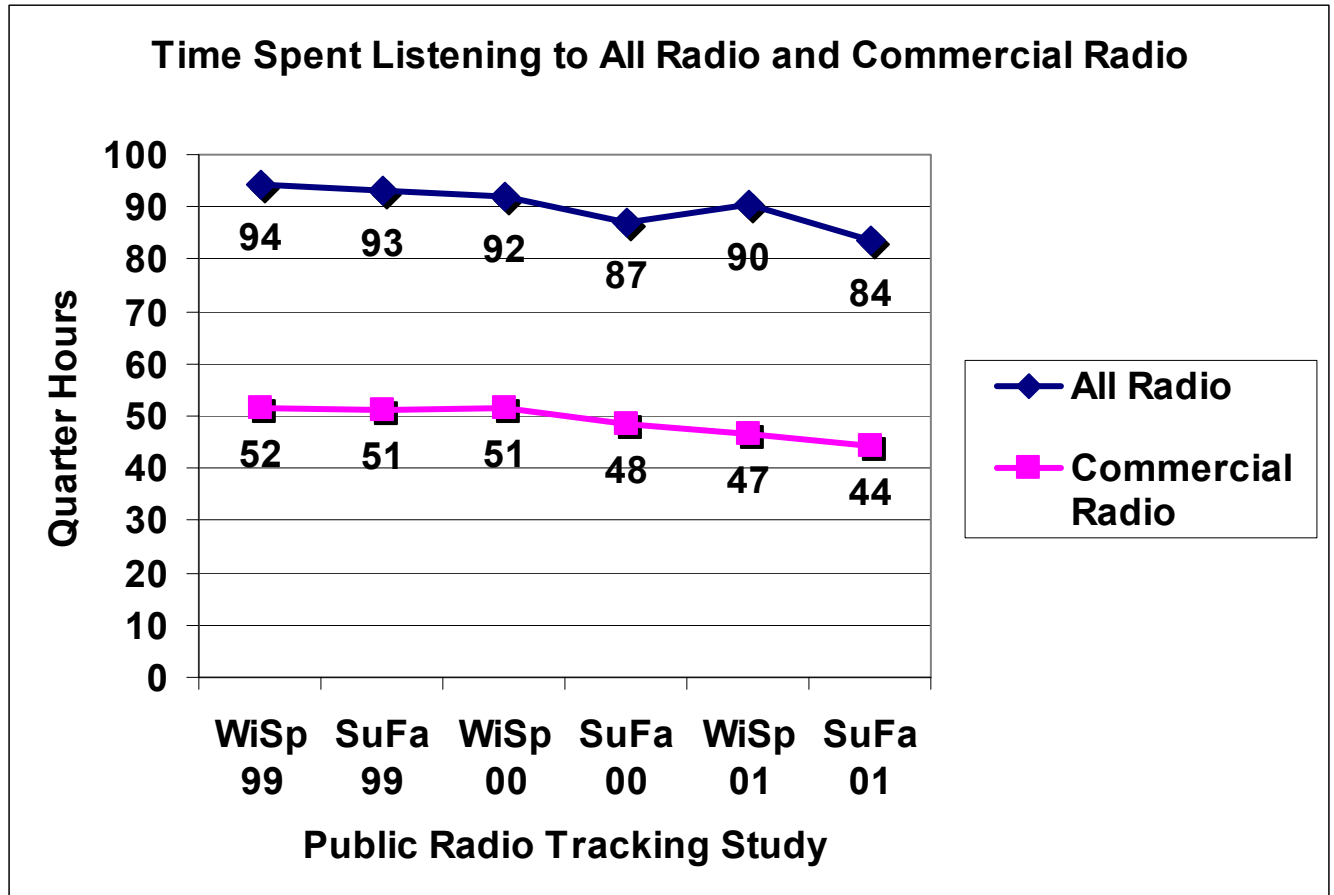
The general decline in radio use is related to gradual yet fundamental changes in the demographic composition of the USA population, changes in how we live our lives and changes in the competition from other media.

What about public radio listeners in particular?

Are public radio listeners using less radio?

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This chart shows Time Spent Listening by public radio listeners—their TSL to all radio and to commercial radio in particular. Within the relatively short span of the Public Radio Tracking Study we documented a downward trend in radio listening by public radio listeners.

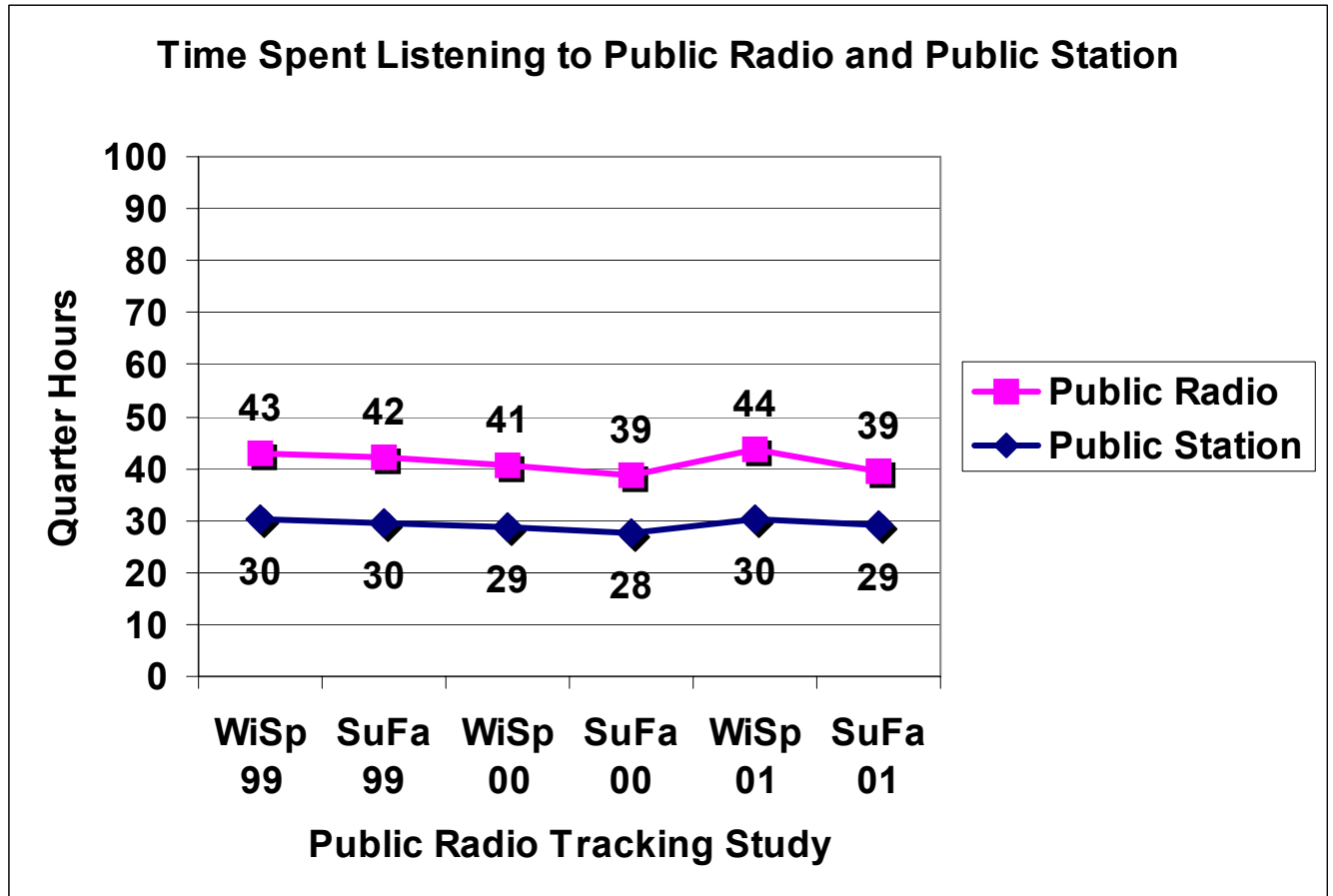
In Winter/Spring 1999 our respondents averaged 94 quarter hours of radio use per week. That would be 23.5 hours per week. By Summer/Fall 2001 radio use by our respondents had dropped to 84 quarter hours per week.

Now look at the trend in Time Spent Listening to commercial radio by public radio listeners. That dropped from 52 to 44 quarter hours from Winter/Spring 1999 to Summer/Fall 2001.

Public radio listeners are spending less time with radio overall because they are spending less time with commercial radio.

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While public radio listeners have been using less radio overall, we found that their Time Spent Listening to public radio has not declined significantly.

The lower line shows average TSL to a single public radio station. TSL to a single station has hovered around 29 quarter hours or 7.25 hours per week.

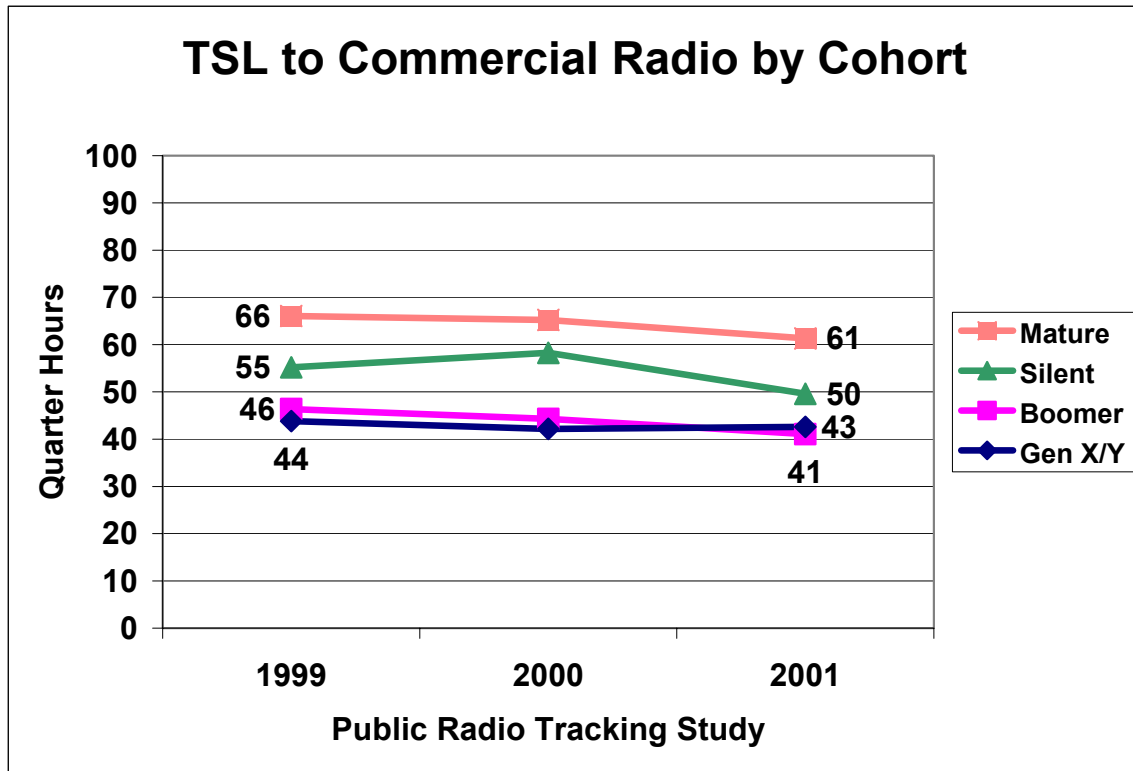
But most public radio listeners can tune in more than one public radio station in their market. We looked at that additional public radio listening as well.

The higher line adds in listening to more than one public station. We found that average TSL to public radio hovers around 41 quarter hours per week.

The good news is that public radio listeners have maintained their level of listening to public radio, even though their use of commercial radio has declined in recent years.

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Fundamental changes in our economy and culture may be explained by the rise and fall of generational cohorts. Just as Baby Boomers replaced their parents, younger cohorts will replace the Baby Boomers. Demography is destiny.

This chart shows listening to commercial radio by generational cohorts.

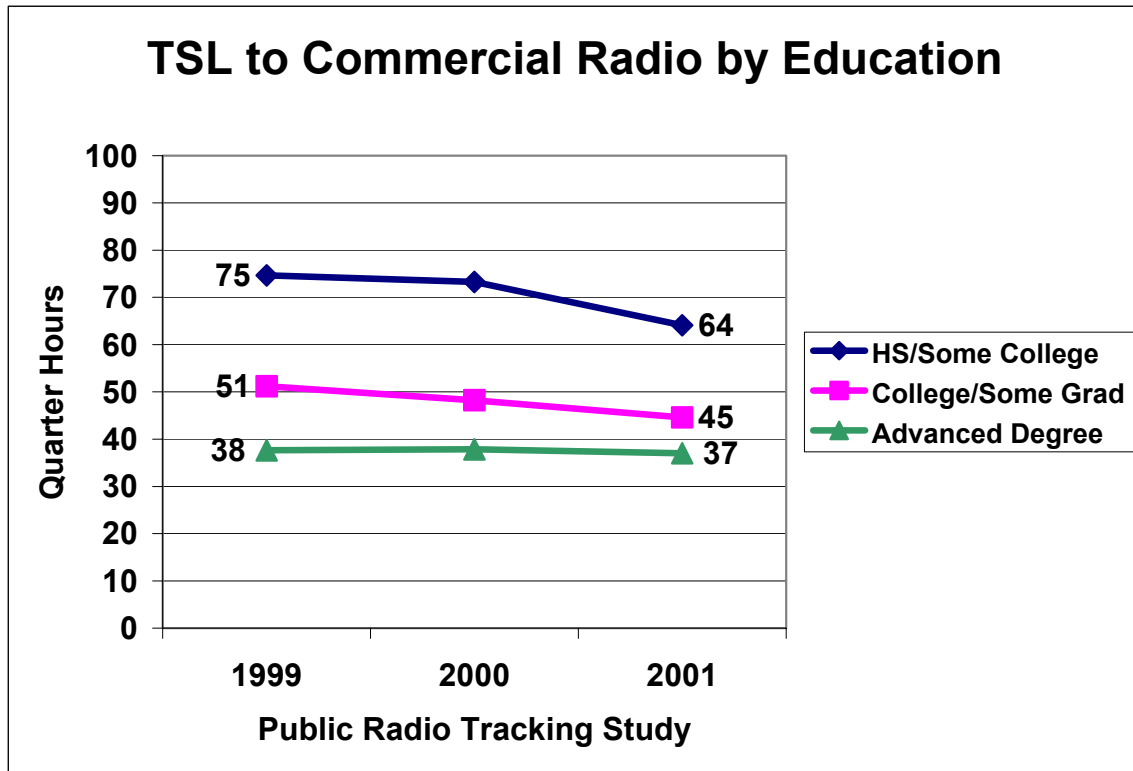
We found that public radio listeners in the Mature generation (born before 1933) are the heaviest users of commercial radio. After all, they were middle aged before public radio began to have an impact in the 1970s. Yet their use of commercial radio is declining, from 66 quarter hours in 1999 to 61 in 2001.

The Boomers (born 1946-1964) were young when public radio was young, so they still dominate the audience for most public radio stations. During the span of the Tracking Study, we found that TSL to commercial radio by Boomers in the public radio audience declined from 46 to 41 quarter hours.

Generations X/Y (post 1964) cannot recall a time before public radio. Their TSL to commercial radio is only 43 quarter hours. As cohorts march into the future, we expect less listening to commercial radio by public radio listeners.

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Public radio appeals to highly educated listeners. That is nothing new, but this chart shows a new angle—how different educational segments within public radio listeners use commercial radio.

We found that public radio listeners with advanced degrees (MA, PhD, MD and the like) use the least amount of commercial radio. On average, we found that super-educated public radio listeners use commercial radio for only 37-38 quarter hours per week.

Public radio listeners with regular college degrees (BA, BS) started out using 51 quarter hours of commercial radio in 1999 but dropped to 45 quarter hours by 2001. They are following the lead of the super-educated listeners.

Some public radio listeners did not graduate from college. We found that they are relatively heavy users of commercial radio. In 1999 they used 75 quarter hours of commercial radio per week—double the amount used by those with advanced degrees. Yet by 2001 their use of commercial radio had dropped to 64 quarter hours, following the lead of the college graduates.

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Loyalty to Public Radio

Loyalty can be quantified in behavioral terms. When audience researchers use the term loyalty, they refer to a percentage calculation—an individual’s listening to public radio as a percentage of that person’s overall use of radio.

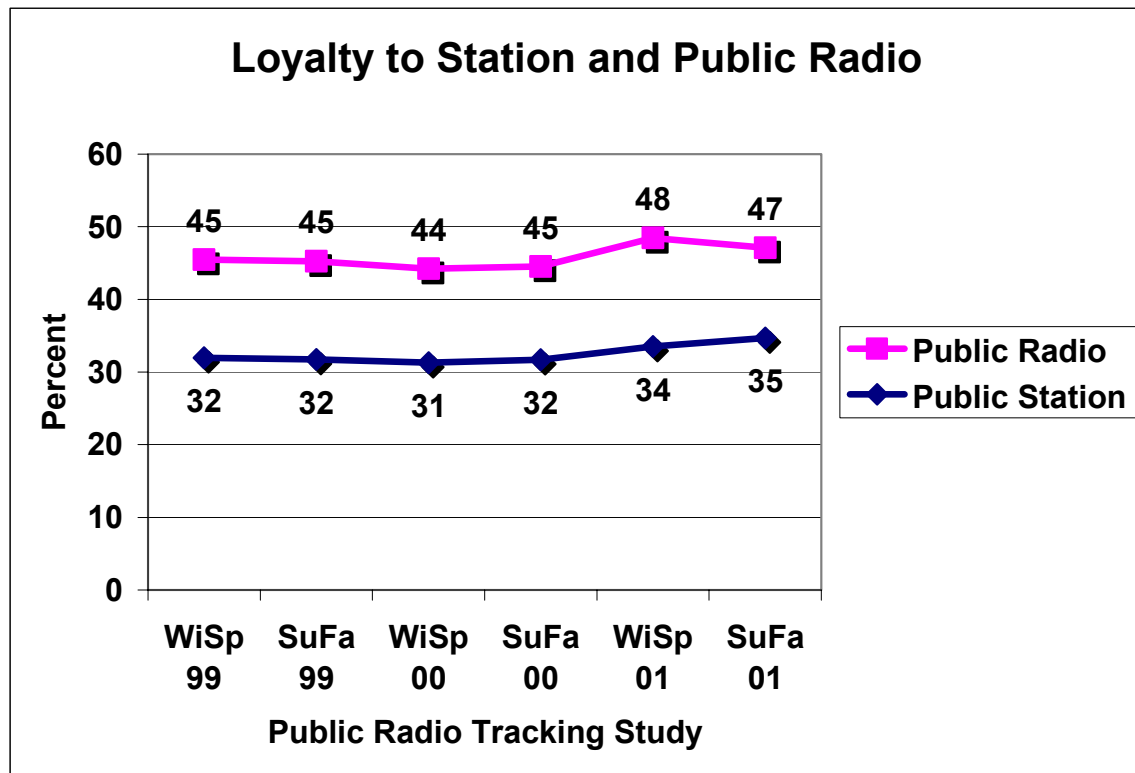
In the previous section of this report we saw that public radio listeners, especially the highly educated and younger generations, are consuming less commercial radio.

Yet, their time spent listening to public radio has not declined.

It follows that public radio listeners are becoming more loyal to public radio.

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We found that average loyalty to a single public radio station (the lower line) increased from 32 to 35 percent during the Tracking Study, especially in the third year, 2001.

Most public radio listeners have the opportunity to tune in multiple public radio stations. Adding the listening to more than one public station (the upper line), we found that loyalty to public radio increased from 45 percent in 1999 to 47 percent in Summer/Fall 2001.

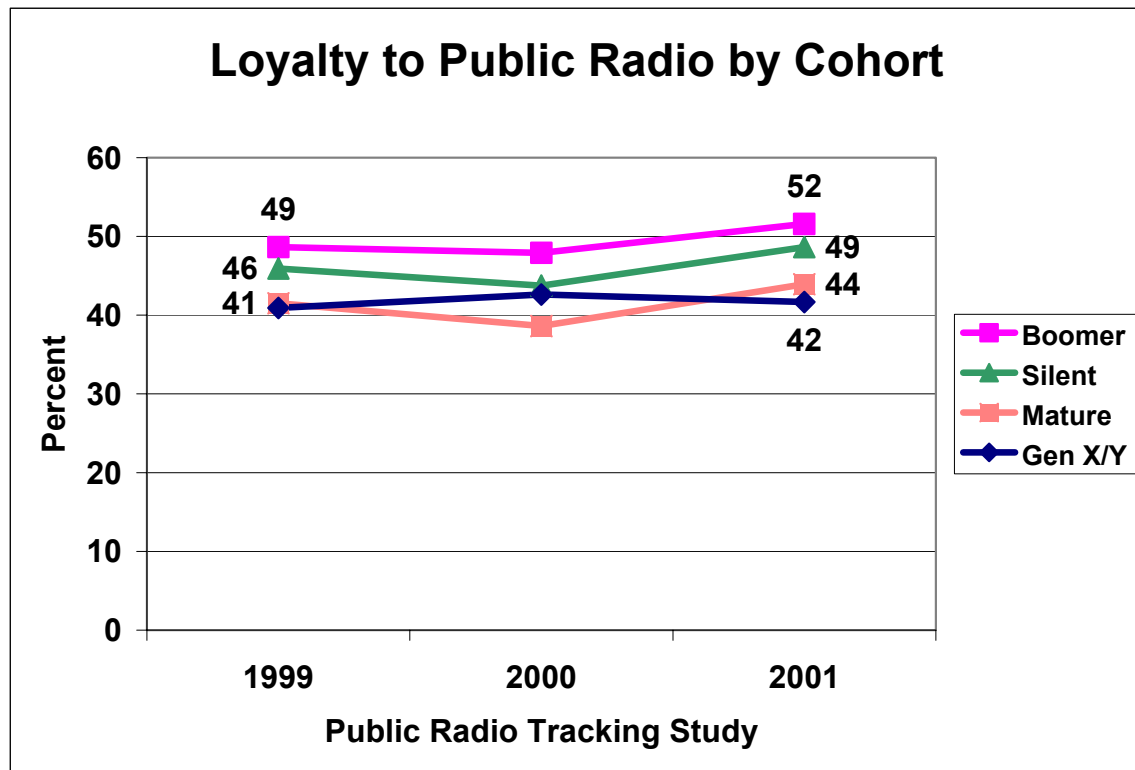
Think about that.

On average, public radio listeners now spend nearly half of their radio listening time with public radio.

Public radio is close to capturing the majority of radio listening by its listeners.

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The Public Radio Tracking Study



This chart shows loyalty to public radio—including multiple stations—by generational cohorts of public radio listeners.

Baby Boomers, who in year 2003 range from 39 to 57 years old, are public radio's most loyal cohort. Their loyalty increased from 49 to 52 percent during the span of the Public Radio Tracking Study.

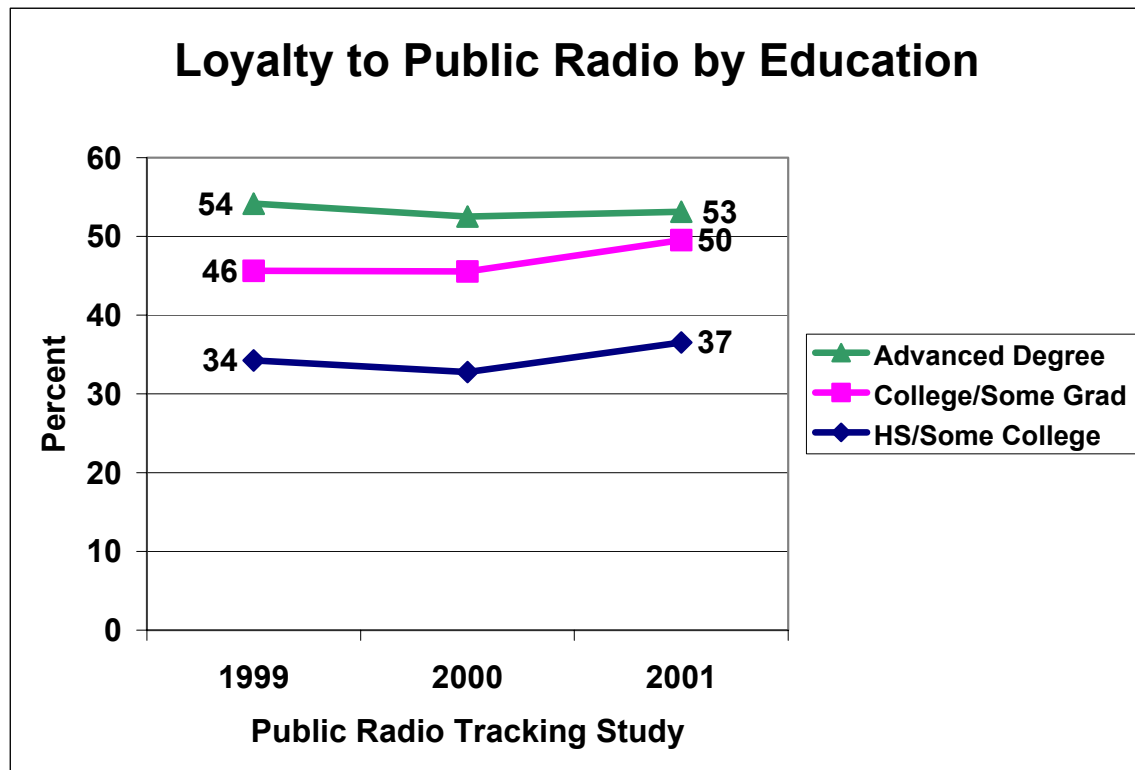
The Silent generation, aged 58 to 70 in year 2003, are somewhat older than the early Boomers and somewhat less loyal. Still, their loyalty to public radio increased from 46 to 49 percent during the Tracking Study.

Since public radio programming is effectively targeted generationally to Boomers and Silents, loyalty to public radio is not as strong among the Matures, who are older, and Generations X/Y, who are younger.

Will younger generations automatically increase their loyalty as they age? That would be true only if public radio's appeal were simply an age effect. Instead the appeal of our current programming seems to operate as a cohort effect.

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The Public Radio Tracking Study



This chart shows loyalty to public radio—including multiple stations—by level of education within the public radio audience.

The most loyal public radio listeners are the super-educated with advanced degrees. During the Tracking Study, this elite segment of public radio listeners dedicated over 50 percent of their listening to public radio.

During the same period, we found that college graduates increased their loyalty to public radio from 46 to 50 percent.

The least loyal segment of public radio listeners are those who did not graduate from college. Much of the programming is probably off target for high school graduates. Yet their loyalty increased a few points from 34 to 37 percent.

Considering that public radio is effectively aimed at educated listeners—those with at least a college degree—we can now say that public radio captures at least 50 percent of radio listening by listeners within its target audience.

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The Public Radio Tracking Study

Core Listeners

In our two previous Special Reports, *Turning Listeners into Givers* and *Heavy Givers*, we confirmed the central findings of *Audience 98*:

Listeners who rely upon public radio are more likely to give.

As reliance increases, so does the level of giving.

Station managers receive stacks of Arbitron data each quarter. There are so many numbers that managers may be overwhelmed. Which of the many measures of audience is the best indicator of reliance?

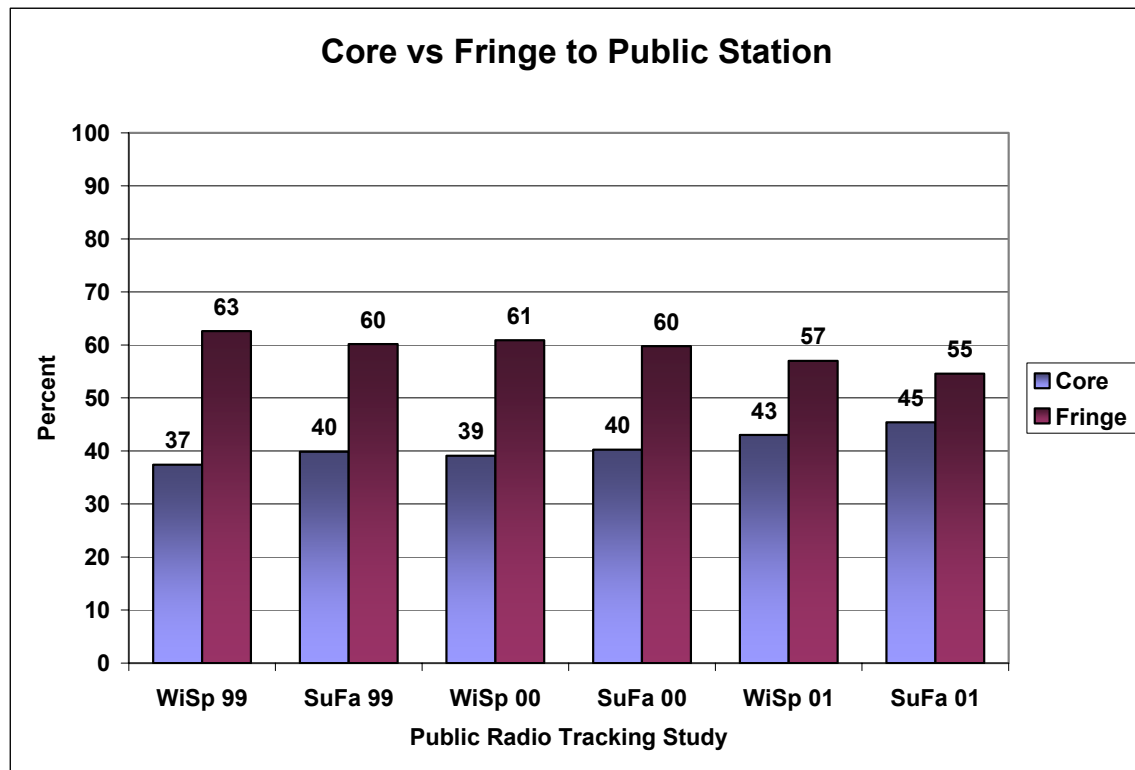
If we had to pick a single number to assess and trend the performance of public radio stations, that metric would be the number of Core listeners.

A Core listener is one who uses a public radio station more than any other station. The public station ranks number one in the listener's Arbitron diary.

The ideal station would expand its weekly cume, serving more listeners, while increasing listener loyalty, thereby maximizing its Core cume.

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This chart shows a powerful and significant mega trend—the percentage of public radio listeners who are Core to their station.

The Core composition of public radio stations in the Tracking Study increased from 37 percent in Winter/Spring 1999 to 45 percent in Summer/Fall 2001.

Fringe composition—listeners who use some other station as their number one—dropped from 63 to 55 percent by Summer/Fall 2001.

Ten years ago, delivering research to station managers, we used to consider a Core composition of 35-40 percent to be reasonably good. Now, with the latest AudiGraphics data from Summer 2003, we are seeing major market public radio stations achieve over 50 percent Core composition.

Core listening indicates behavioral reliance upon public radio, which is why the number of Core listeners served by a station can predict that station's annual income from listener contributions.

This mega trend is great news for both listener service and listener support.

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Personal Importance

Personal Importance is the internal realization that public radio has become important in your own life. Personal Importance has nothing to do with altruism. *Audience 88* demonstrated that givers are motivated by their own needs rather than the needs of others.

Program directors must design formats that not only build reliance in terms of listening behavior but also stimulate a realization of importance in the lives of public radio listeners.

Here is how we measured Personal Importance in our recontact questionnaire:

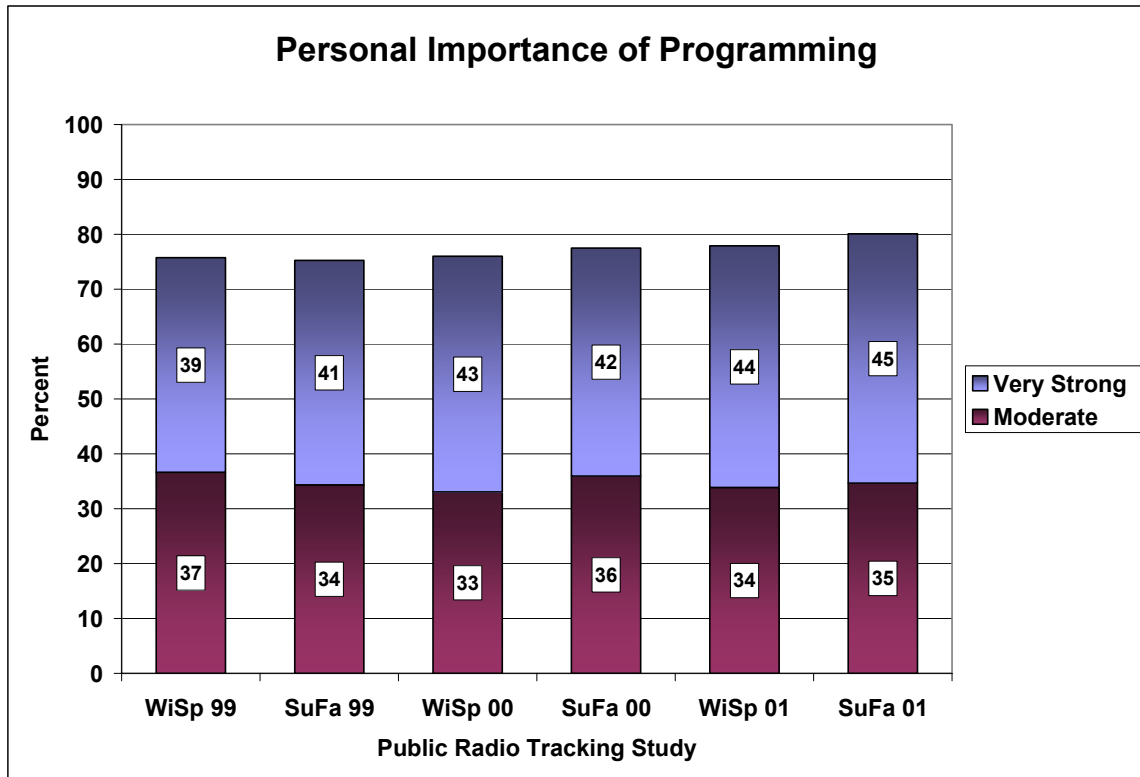
“The programming on [STATION] is an important part of my life. If it went away I would miss it.”

The response format was a six-point scale from strongly agree to strongly disagree.

What is the mega trend in Personal Importance?

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During the span of the Public Radio Tracking Study, we saw a gradual yet relentless increase in the perceived importance of public radio programming.

In Winter/Spring 1999, 76 percent of public radio listeners very strongly or moderately agreed that the programming was important in their lives.

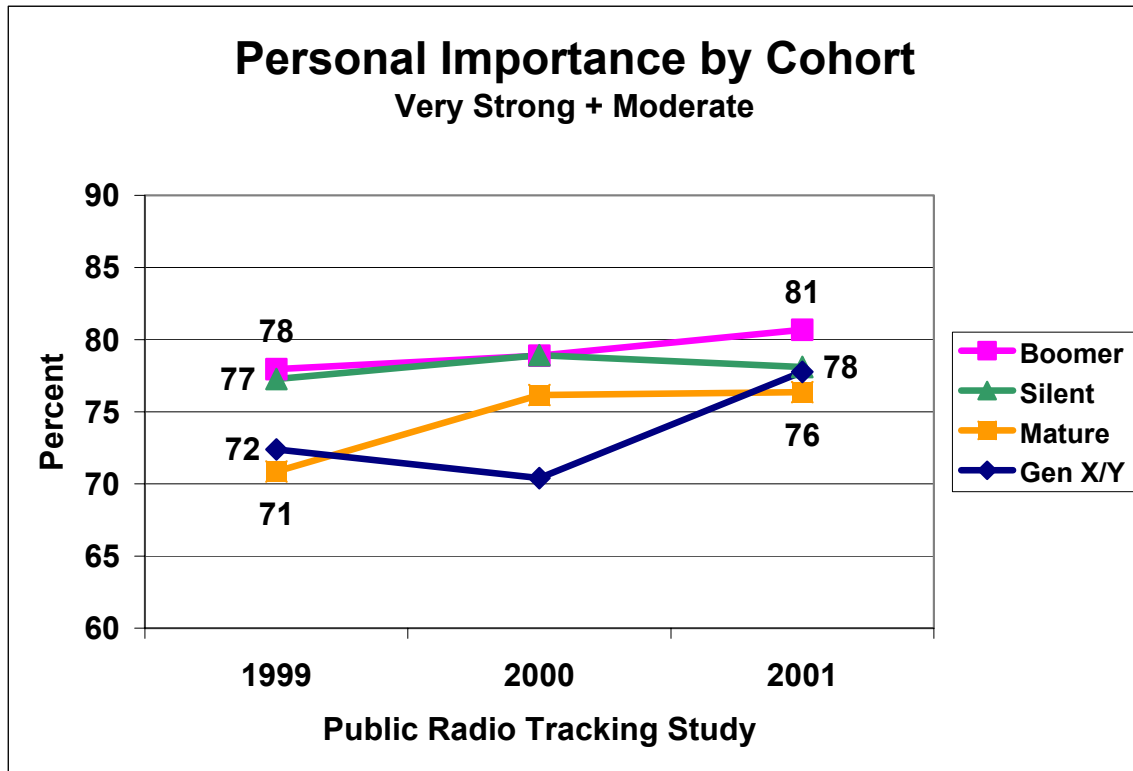
By Summer/Fall 2001, that figure had risen to 80 percent.

The growth rate may appear to be modest, but research has shown that each point of Personal Importance results in additional dollars contributed to public radio stations.

Givers are listeners who find real value in public radio programming. In focus groups, public radio listeners tell us that while they sometimes use commercial radio stations, they perceive minimal value in commercial radio programming.

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Consistent with previous findings, the Boomers (1946-1964) are most likely to evaluate public radio programming as personally important in their lives.

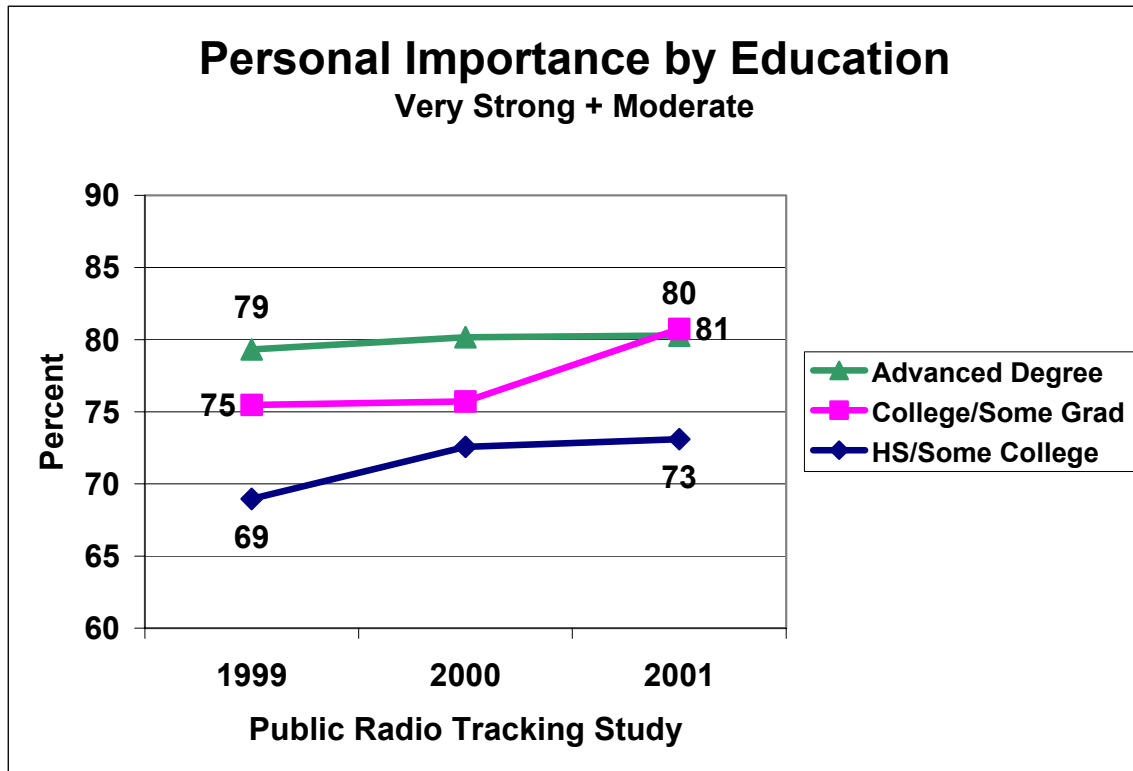
By year 2001, we found that 81 percent of Boomers who listen to public radio said that the service was very or moderately important in their lives.

The other generational cohorts followed closely. By year 2001, the Silents and Generations X/Y were tracking 78 percent.

There are still a few critics out there who charge that public radio programming has lost value as stations have gained listeners. In fact, the programming is perceived as important in the lives of its listeners, even across generations.

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This chart shows trends in personal importance by levels of education.

Among the super-educated with advanced degrees, 79-80 percent reported very strong or moderately strong personal importance.

During the span of the Tracking Study, we found that very strong or moderate personal importance increased among regular college graduates (from 75 to 81 percent) and among high school graduates (from 69 to 73 percent.)

While highly educated listeners are the most likely to value public radio, we found that personal importance has increased across all educational segments of the audience.

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The Public Radio Tracking Study

Formats and Programs

We have demonstrated that public radio listeners are increasingly reliant upon public radio. The service has become even more important in their lives. But public radio still carries a variety of programming, and managers have to make particular programming decisions.

Do listeners rely on public radio for music or for news?

What is their relative loyalty to local vs national programming?

We found that the mega trends in listening and loyalty are not consistent across various types of public radio programming.

National AudiGraphics

The charts in this section are based on National AudiGraphics provided by Audience Research Analysis, tracking program types from 1995 through 2002.

National AudiGraphics includes nearly all listening to public radio stations across the entire country.

ARA's national findings are consistent with and extend the time span of the Public Radio Tracking Study.

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The Public Radio Tracking Study

Local vs Acquired Programming

A public radio station may produce its own programming locally or it may acquire programming that is distributed nationally.

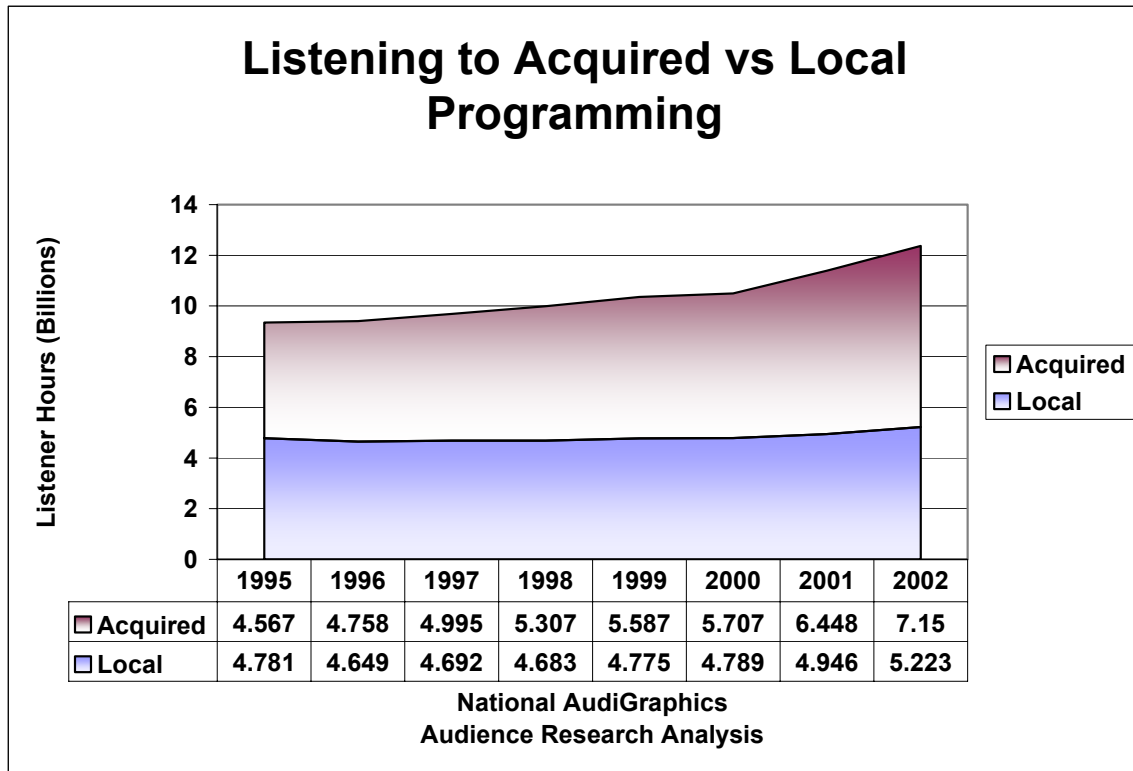
Public radio managers may invest in local production because they want to serve local needs, or they may hope that listeners will eventually recognize the station as a community institution.

On the other hand, stations may pool their limited resources by investing in national programming. Network affiliated stations may acquire programming from National Public Radio or Public Radio International. There are also many syndicated programs made available via satellite, CDs or the Internet.

What are the mega trends for local vs acquired programming?

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This chart shows a gross measure of consumption—the amount of listening to public radio in Listener Hours. This is all public radio nationwide, not just the stations in the Public Radio Tracking Study.

If one listener uses a public radio station for one hour, that would be one Listener Hour. In year 2002, public radio listeners consumed over 12 billion hours of public radio programming, compared to about 9 billion hours in 1995.

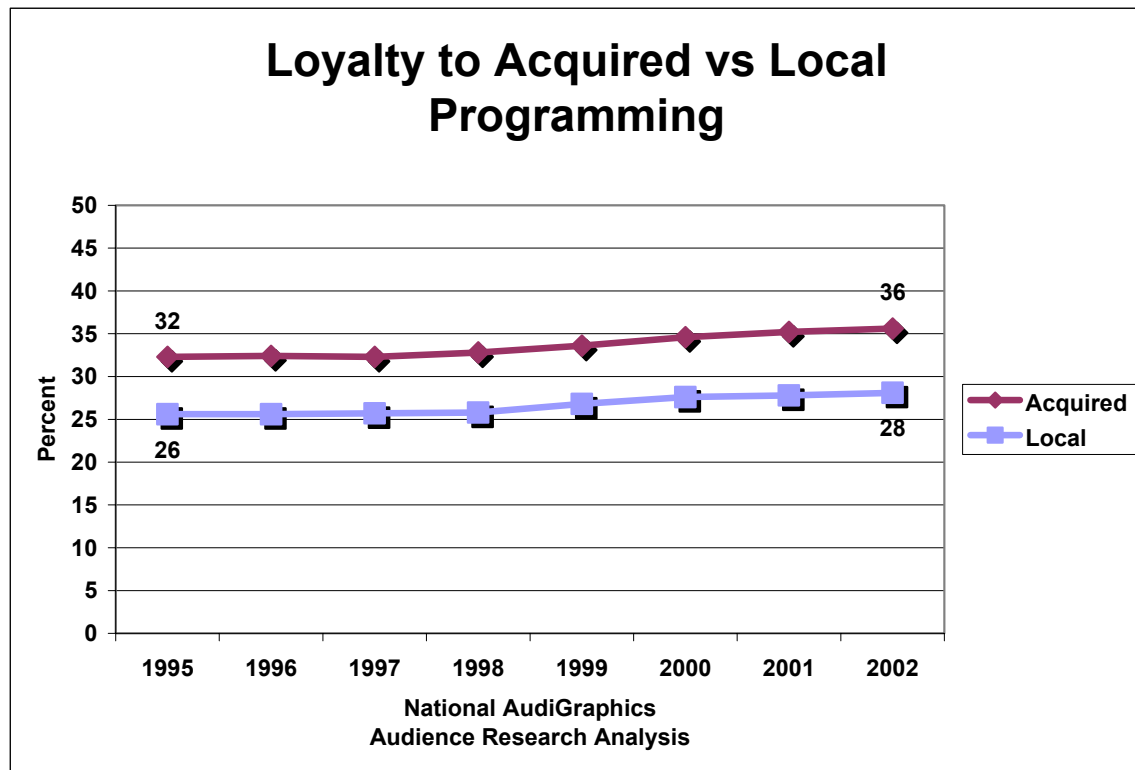
But look at the growth in listening to acquired vs local programming.

In 1995 there was an almost equal consumption of acquired (4.567) and local (4.781) programming. Seven years later, listening to acquired programming had leaped up to 7.15 billion Listener Hours. The trend in listening to local programming was basically flat.

Part of the explanation is that stations were decreasing the percentage of their broadcast hours devoted to local programming. Still, we can say that most of the growth in listening to public radio from 1995 to 2002 was the result of acquired programming, rather than local programming.

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This chart shows the trend in loyalty to public radio stations nationwide, breaking out listener loyalty to local vs acquired programming.

In 1995, for all local programming the average loyalty was 26 percent. Loyalty for acquired programming was 6 points higher at 32 percent.

By 2002, loyalty to local programming had risen 2 points to 28 percent, but loyalty to acquired programming had risen 4 points to 36 percent.

We see that public radio listeners are generally more loyal to acquired programming rather than local. And acquired programming has increased its lead over local programming.

Keep in mind that we are tracking those measures of public service that generate public support. From 1995 to 2002, most of the growth in public service was due to acquired rather than local programming. And listeners by their behavior demonstrate greater loyalty to acquired rather than local programming.

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The Public Radio Tracking Study

News Talk vs Music

Public radio stations in major markets are focusing their formats. One station might drop its music programming to go all news and talk. Another station in the market installs a coherent music format, either classical or jazz.

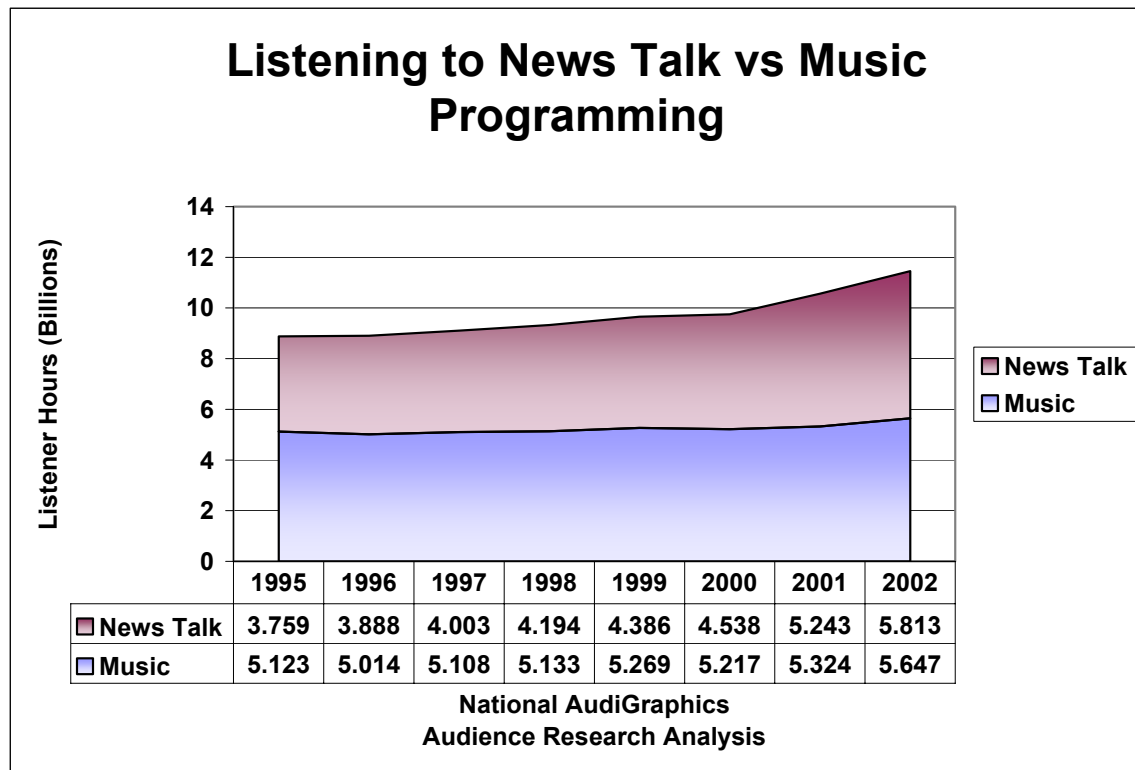
The economics are quite different. Informational programming is expensive to produce, while music formats can be produced inexpensively.

Yet in smaller markets, especially those with a single public radio station, we still find dual format stations. Network news magazines are scheduled in drive time. Music is played during the rest of the day.

What are the mega trends for music vs news and talk programming?

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This chart shows a gross measure of consumption—the amount of listening to public radio in Listener Hours. This is all public radio nationwide, not just the stations in the Public Radio Tracking Study.

In year 1995, the music programming on public radio generated 5.123 billion Listener Hours of public service.

Seven years later, in 2002, music programming generated 5.647 billion Listener Hours. That was only a ten percent increase.

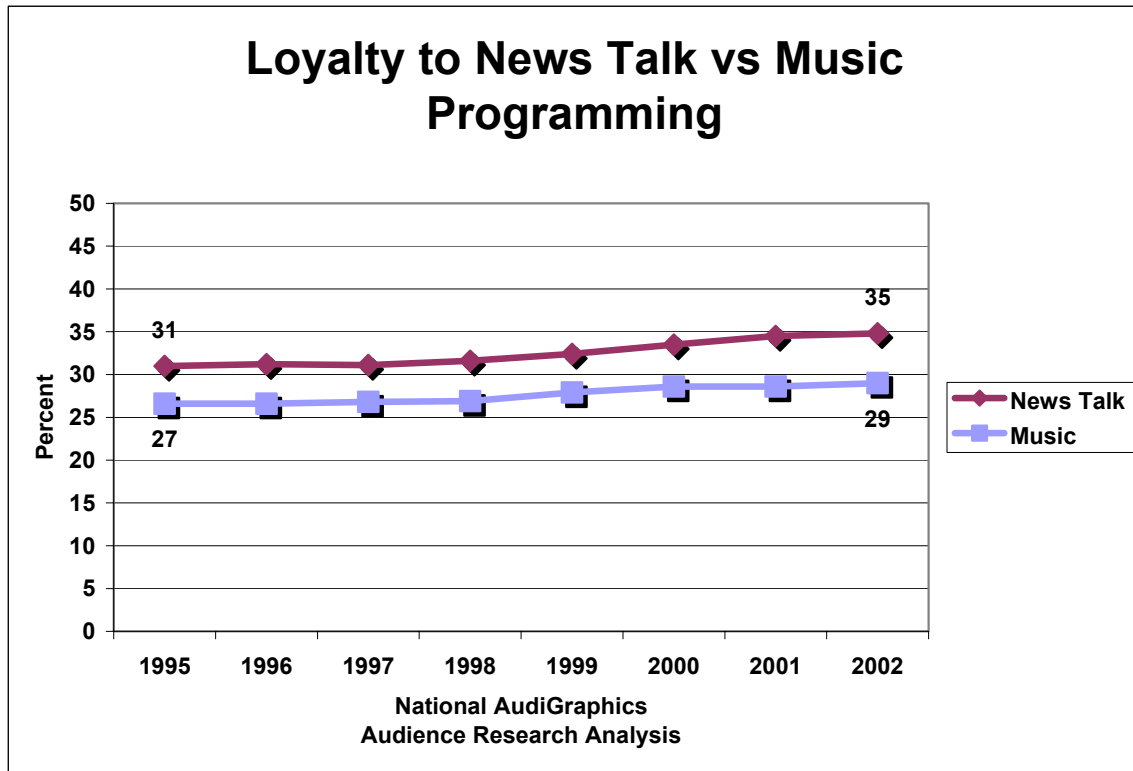
In 1995 the gross consumption of news talk programming was less than 4 billion Listener Hours, significantly less than the public service generated by music. Seven years later news talk programming surpassed listening to music.

By 2002 the consumption of news talk programming had risen to 150 percent of its 1995 base.

It is true that stations were generally scheduling fewer hours of music, still the overall growth in listening has been due primarily to news talk programming.

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This chart shows the national trends in loyalty to news talk vs music programming on public radio.

In 1995, music programming on average yielded 27 percent loyalty. Public radio's news talk programming was 4 points higher at 31 percent.

Earlier in this report we demonstrated that public radio listeners are becoming more loyal to public radio, especially as they use less commercial radio. This chart shows that while loyalty to public radio's music has increased 2 points, loyalty to public radio's informational programming rose 4 points.

Loyalty is a powerful indicator of the potential for listener support.

The continuing growth in loyalty to news talk programming has outpaced the modest improvement in loyalty to public radio's music.

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NPR News vs Local Classical Music

Let's get down to the hard reality.

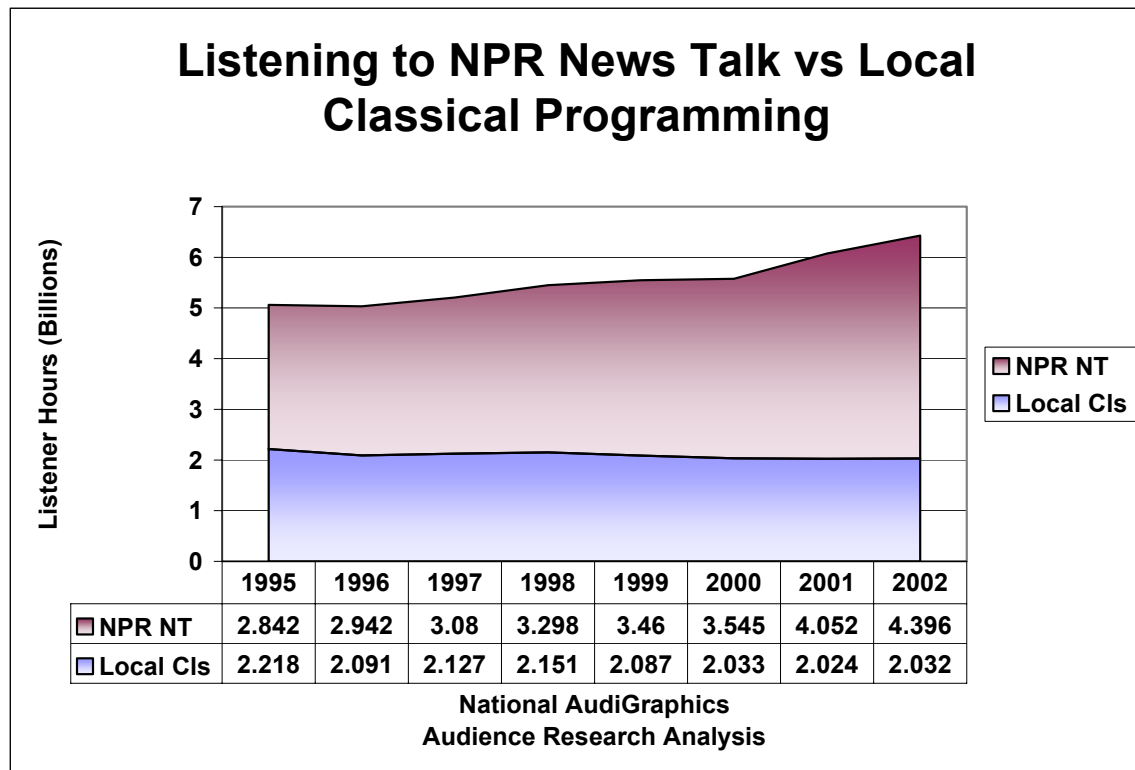
While there are many syndicated programs looking for carriage on a station, for the most part “acquired” programming means network. And for prime time news and talk programming, that network is National Public Radio.

Classical dominates the music on public radio. While there are national syndicators of classical programming, most classical stations still employ local announcers who spin CDs.

What are the mega trends with specific reference to NPR news programming vs local classical music?

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Listener Hours measure public service because they quantify the actual use of programming by listeners.

From 1995 to 2002, the consumption of local classical music declined from 2.218 billion to about 2 billion Listener Hours.

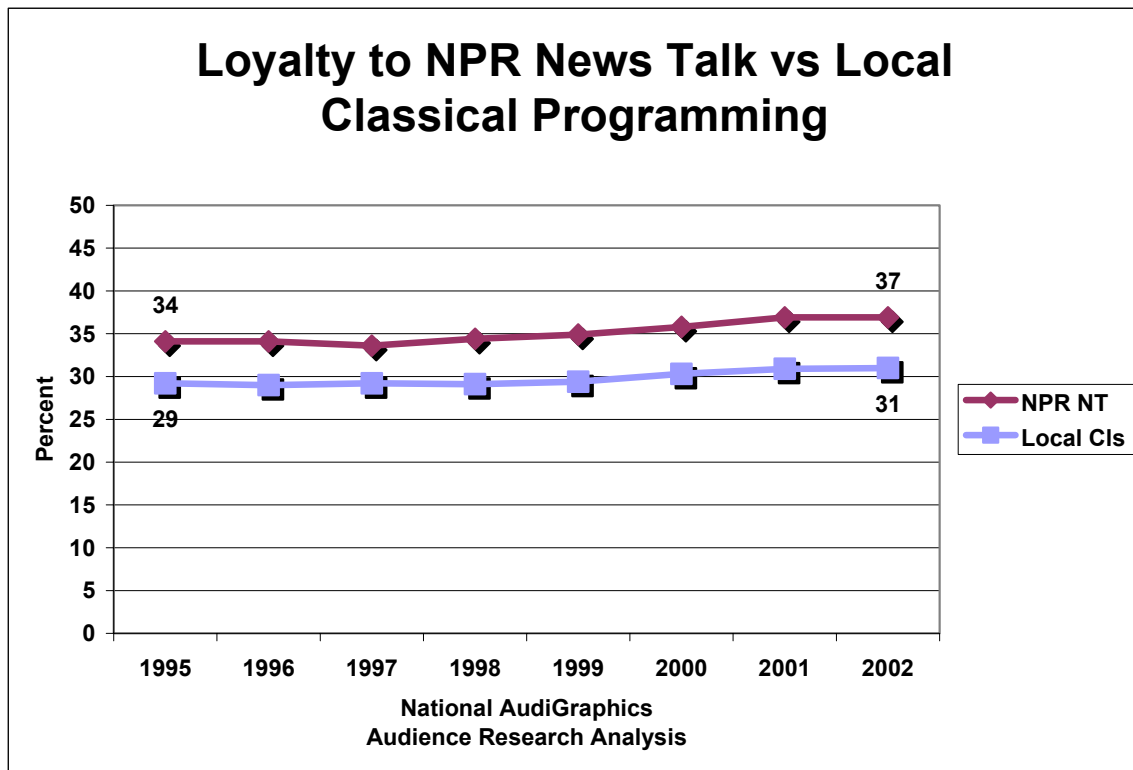
The most optimistic interpretation is that listening to local classical music has been flat and holding.

Meanwhile, the public service generated by NPR news talk has risen sharply to 4.4 billion Listener Hours—over 150 percent of the 1995 figure.

During these years, major market stations were scheduling fewer hours of local classical music as hours devoted to NPR news talk increased.

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This chart shows average loyalty across all local classical music programming, compared to all NPR news talk programming, across the country.

From 1995 to 2002, loyalty to local classical rose 2 points to 31 percent but never caught up to NPR news talk, which rose 3 points to 37 percent.

Once again, loyalty is an indicator of reliance upon public radio. Reliance upon public radio predicts giving. It is not surprising that stations find it easier to raise money from NPR news listeners.

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Conclusions

Public radio managers received their first reliable audience data 25 years ago when CPB contracted with Arbitron for station estimates. Tom Church, who was working at CPB at the time, saw the need for a series of audience research workshops to help managers understand the Arbitron ratings. The first CPB audience research workshop was scheduled for fall 1978.

Before those workshops, the mythology and operating assumption for public radio managers was that each station had a “small but highly loyal” audience.

At those workshops, the joke was that the assumption was half-correct. The audience at that time was small and disloyal.

Arbitron data showed that public radio listeners in the late 1970s tended to be heavy radio users. They used more stations per week than average listeners, and their time spent listening to radio was high. Being deep into radio, they had discovered public radio.

The reality is strikingly different today.

According to the Radio Research Consortium, the weekly cume for CPB qualified stations has risen to over 27 million persons from a base of 5 million in the late 1970s. The audience is no longer small.

And, as we have demonstrated in this report, the audience has become loyal.

In fact, public radio listeners are spending half of their radio listening time with public radio. Their use of commercial radio is declining. They rely upon public radio. It has become important in their lives.

Reliance upon public radio and a sense of personal importance are the true components of public service, raising higher the potential for public support.

The explanation for mega trends is not simply the passage of time. The growth in reach and loyalty is the result of programming that is truly valued by target listeners—especially public radio’s network news programming.

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Method in Brief

The Public Radio Tracking Study follows directly from *Audience 98*, which itself descended from *Audience 88*. David Giovannoni originally designed the recontact methodology, linking respondent-level Arbitron diary data with follow-up telephone or mail questionnaires about giving to public radio.

Audience 98 was based on Arbitron data collected in Fall 1996. After its publication, managers of leading public radio stations gathered in a series of seminars and agreed that the research should be carried forward.

We designed the Public Radio Tracking Study to trend critical measures across quarterly samples of public radio listeners from Winter 1999 through Fall 2001.

This Special Report from the Public Radio Tracking Study is based on 17,591 completed interviews with public radio listeners who kept Arbitron diaries from Winter 1999 through Fall 2001. The sample size for this report is double the 8,000 respondents reinterviewed for *Audience 98*, but our respondents represent leading major market stations, not a projectable national sample.

National AudiGraphics

For context, we also present audience trends based on eight years of National AudiGraphics data provided by Audience Research Analysis. The ARA data is based on all public radio diaries that were processed by the Radio Research Consortium—well over 90 percent of public radio's national audience.

ARA's National AudiGraphics estimates were statistically projected up to the Arbitron Nationwide estimates for all noncommercial stations qualified by the Corporation for Public Broadcasting.