

Audience Research Analysis

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Some Public Radio Programming and Listening Trends

Spring 2001 to Spring 2005

An AudiGraphics Synthesis

The National No-Growth Trend

Public radio's two year no-growth trend is now a widely known fact.

For the first time in many years we cannot say that public radio is continuing to buck the adverse audience trends generally afflicting radio.

A second, equally important fact is that no one really knows for certain why listening is stagnant. The Arbitron audience data that delivered this news has yet to be analyzed thoroughly, and through the lens of public radio's public service measures. This report begins that process.

Listening...

Bad news is not without its benefits. It gives occasion to rethink priorities, and in this case, redirects attention to what drives listening to public radio: programming. However, not all programming drives listening to public radio equally well.

From Spring 2001 to Spring 2005, through shifts in their listening habits, listeners told us why they listen – what draws them most strongly to our broadcast service, and what does not.

... Drives Support

Public radio can ill afford – quite literally – to ignore their message. Broadcasting is our primary business, and listener-sensitive revenue (individual giving +

underwriting) becomes more critical to sustaining it with every passing year.

Every new endeavor, every new audience or technology public radio wants to develop, depends on maintaining a robust broadcast service. Because, for now (and likely for some years to come) radio is the ubiquitous technology that delivers listeners in numbers large enough to make our work matter to the world at large.

While a flat audience hardly upsets every plan, it also isn't a simple problem. One probable consequence of audience stagnation for more than a brief period is a limit on future listener-sensitive revenue growth potential.

Fortunately the national no-growth trend is a warning, and not yet a predicament out of our control.

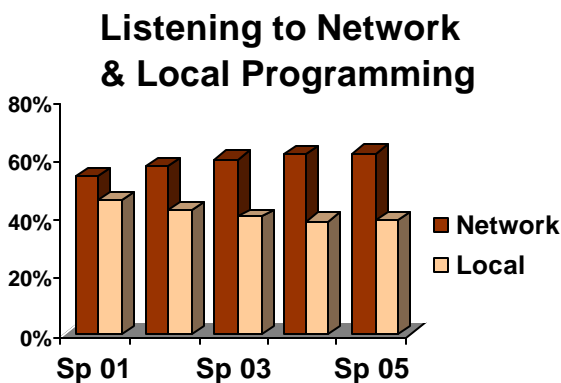
Can we turn the trend around? Can we afford to not to try?

One great advantage public radio has over multiplying media competitors is a wealth of well-researched knowledge about our audience. That, along with some new facts about listening trends, can show us where to start.

Listening Shift to Network Programming Continues

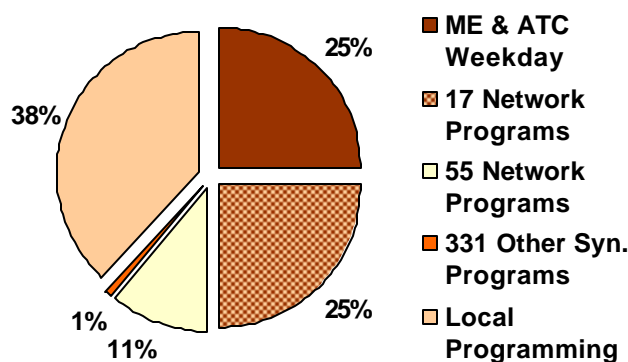
Over the last five years our listeners have been spending an increasing percentage of their public radio listening time with network programming.

- As of Spring 2005 network programming is drawing about 62% of all listening to public radio nationally, up from 54% in Spring 2001, and up substantially from the 49% reported in AUDIENCE 98.



- Half of all listening to public radio nationally in Spring 2005 was produced through 19 network programs and programming services.

Listening to Public Radio Nationally, Spring 2005



- Morning Edition* and *ATC Weekday* now command a quarter of all listening to public radio nationally. The other 17 top programs together produce 25%.

While the top network 19 includes services that sprawl across schedules, like *Classical 24* and *BBC World Service*, and daily programs like *Morning Edition*, seven shows that drive public radio listening are weekend programs.

- These seven are each typically broadcast between one and four hours (including repeats) per weekend; are widely carried; and generate a significant amount of national listening.

Five years ago it took the 53 top-performing national programs to aggregate half of national listening to public radio. What changed?

The consolidation of so much listening to 19 network programs may be explained, in part, by networks' greater emphasis on producing, acquiring, and marketing programming services rather than single-hour weekly series.

More important, stations have increased their use of network services, perhaps because they offer an easier, economical way to give a greater expanse of their broadcast schedules the consistent programming appeal needed for audience growth.

Listener-Hours (LHs) measure the **volume** of programming (public service) "consumed" by listeners. Calculation is either weekly or annual. Unlike AQH this ARA metric can be summed and can also be compared across stations, formats, and markets.

The Network Programs = 50% of Listening to Public Radio

In descending order according to their weekly listener-hours, these are the network programs and services that drew half of public radio listening nationally in Spring 2005:

Morning Edition
All Things Considered Weekday
Classical 24
Fresh Air
BBC World Service
Classical Public Radio Network
A Prairie Home Companion
Talk of the Nation
Weekend Edition Saturday
Marketplace
Car Talk
The Diane Rehm Show
Weekend Edition Sunday
The World
Day to Day
Performance Today
Whad'Ya Know?
Wait, Wait...Don't Tell Me
This American Life

POWER is the difference between average listener Loyalty to the program and the average weekly Loyalty to the full programming schedule of a station (or across all carrying stations, for national programs.) Power can be negative or positive.

LOYALTY is the percentage of a station's own listeners listening to the station, or to a program, when they are using radio. Because it controls for audience size this metric can be used for comparisons across stations, formats, and times.

The Most Powerful and Productive Network Programs

Not all programming with substantial national listening is powerful programming. Only a short list of network programs have the measurable ability ("Power," see box below) to attract listening **to** carrying stations, rather than draw their listening **from** the stations.

These programs, if seemingly expensive, are often still a bargain for stations because research shows they usually contribute heavily to a station's potential for listener-sensitive revenue.

Unfortunately the list of powerful network programs is very short, and its growth has been stagnating much longer than the national audience.

- In the last five years, only one new network program has emerged as a powerful audience draw: *Wait, Wait...Don't Tell Me*.

In descending order by their magnitude, these 10 are the only programs and services among the top network 19 that have consistently positive Power:

Car Talk
A Prairie Home Companion
Morning Edition
Weekend Edition Saturday
Weekend Edition Sunday
Wait, Wait...Don't Tell Me
Whad'Ya Know?
Marketplace
All Things Considered Weekday
The Diane Rehm Show

No Signs of Growing Importance for Local Programming

Without audience growth the expanding network share of national listening has come at the expense of local programming.

At a time when many station managers seem certain that airing more local programming is their best competitive strategy, listeners are generally showing less interest in listening to it.

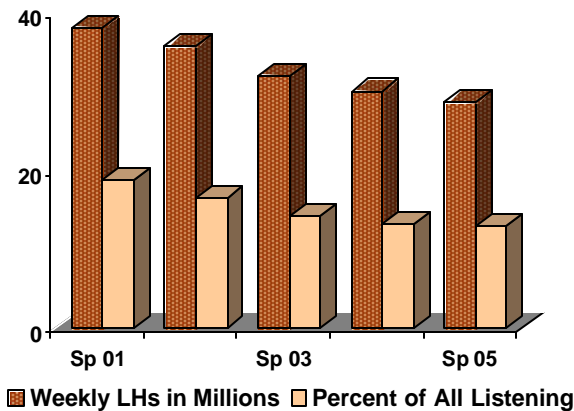
This is not a change in trend.

In general local programming has a long history of lower average Loyalty, weaker Power, and less listening than the top-drawing network programming.

In Spring 2005:

- Classical and jazz continue as the most tuned to local formats, but they have been in steady decline since Spring 2001, in weekly listener-hours and as a percentage of all public radio listening

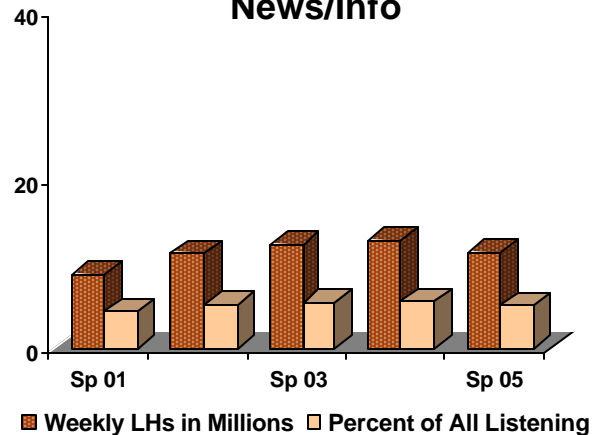
Listening to Local Classical



- Weekly listener-hours for local classical have declined about 25% since Spring 2001. Local jazz has seen a drop of nearly 10%.
- Triple-A and the more widely carried "Music Mix," (contemporary music which varies from station to station) have not emerged as more important local formats in the last five years.

In Spring 2005 the two formats delivered about the same percentage (4% combined) of public radio listening nationally as they did in Spring 2001.

Listening to Local News/Info



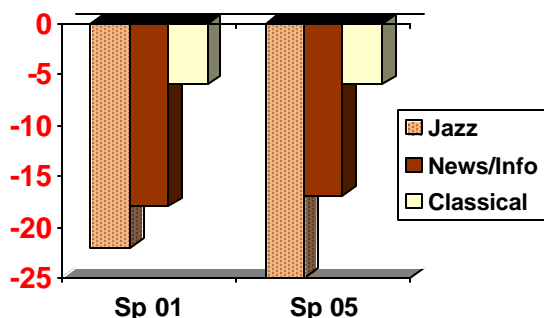
- Local News & Information (includes all local talk, call-in, interview, public affairs, and other discrete information programs) is effectively flat.

At five percent, the percentage of national listening to Local News and Information has barely budged in five years. The format did show a small rising trend in weekly listener-hours until Spring 2005.

- Local Talk and Call-In programming, a subset of Local News & Information, continues carriage growth without showing evidence of strengthening stations' competitive advantage. It induces a drop in listener Loyalty – sometimes steep – on most of the 156 stations airing these kinds of programs.

In fact, the greater concern about local programming than flat or falling listener-hours is that major local formats have not shown signs of breaking out of their historical low listener Loyalty and negative Power patterns across carrying stations.

Power & Local Formats



Power and Loyalty information for AAA and Music Mix extend back four years.

This particular lack of change doesn't portend well for the future of local programming in its present formats. When any programming has consistently negative Power it weakens the carrying station's overall audience service.

Because such programming isn't a strong service to most of the station's listeners, it also hurts the station's

overall ability to increase listener support.

Broadcasting ¹ Listening to Local Music

Most locally originated program listening (86%) comes from disc-based music, as it has for decades. And no wonder: it's the most economical audience service a station can provide. Or is it?

As a local format, disc-based music appears to be the weakest part of the national listening pie.

In Spring 2005 more stations actually broadcast local classical, jazz, AAA, and/or Music Mix than did in Spring 2001, with the respective average available format-hours dropping only slightly.

Even with additional carriage, listener-hours to AAA/Music Mix remained flat; jazz declined; and classical declined even more than jazz.

In fact, stations with a predominantly classical, jazz, or AAA/Music Mix format – and without the two weekday drive time NPR newsmagazines – were more likely than any other kind to have experienced listening loss in the last two years.

These new listening trends suggest a fresh look at economic assumptions about local music – whether it's for broadcast or developed as a new media stream – may be prudent and timely, if restarting audience growth and growing listener-sensitive revenue are priorities.

A re-examination would do well to note the AUDIENCE 98 findings that

listeners give less per listener-hour for music programming than for news, local or national (or for certain top-performing network entertainment programs);

and most listeners were unlikely to say public radio's music programming has a unique character – a quality the majority did assign to news.

In Conclusion, for Now

It seems obvious to point out that arrested audience growth is likely related, at least in part, to possible problems with our programming. Logically, at least, it's a reasonable initial hypothesis.

We know that powerful programming attracts listening to public radio. Is too much weak programming responsible for limiting its growth?

In a public service industry that seems to swear by the mantra "Think Audience," a great deal of programming not serving listeners particularly well stays in national distribution and on the air.

Raising questions about possible inherent flaws in programming – if only to draw attention to data and analysis to which networks and stations freely subscribe – tends to raise hackles too.

For programming producers (local or national) it seems that measures of weakness and strength are only valid when they apply to some *other* programming.

This ARA report aims to raise questions, not hackles. Using measures and analysis now at hand is where we begin. A greater understanding about the issues and opportunities surrounding the no-growth trend requires deeper digging.

— Leslie Peters
Steve Olson

KEY POINTS

- Stagnant listening for more than a brief period is likely to mean stagnating listener-sensitive revenue potential.
- Listeners have been signaling an increasing preference for network programming by spending more of their public radio listening time with it.
- The most-carried local formats generally continue to produce far less listening relative to the hours available to listeners when compared to top network programs and services.
- With one exception, the short list of national programs with the measurable ability to draw listening hasn't expanded in years. It's been stagnating much longer than the national audience.