

grow the **audience**
for public radio

Audience Goals: Report on System Progress

Tom Thomas & Terry Clifford

Station Resource Group

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GROW THE AUDIENCE is an ongoing, broad-based effort to shape shared strategies, compelling goals, and results-oriented plans to deepen the value and widen the use of public radio.

In early 2010 the project published PUBLIC RADIO IN THE NEW NETWORK AGE, the report of the Public Radio Audience Growth Task Force, which set out a wide range of recommendations for action at the local and national level.

The recommendations proposed challenging audience growth goals for public radio over the coming decade – goals framed within a larger vision of service, the changing character of our communities, and the evolving technology of communications.

A year later, this report examines public radio's progress toward GROW THE AUDIENCE GOALS.

GROW THE AUDIENCE was initiated and funded by the Corporation for Public Broadcasting.

The Station Resource Group provides ongoing leadership for the GROW THE AUDIENCE initiative and prepared this report.

Recommendations, research reports, essays, and other materials can be found at the GROW THE AUDIENCE section of SRG's website:

www.srg.org/GTA

For additional information:



STATION RESOURCE GROUP | 301.270.2617 | www.srg.org

Tom Thomas, co-CEO

tthomas@srg.org

Terry Clifford, co-CEO

tclifford@srg.org

PO Box 5807 | Takoma Park, Maryland 20913-5807

Station Resource Group is a membership organization of leading public media organizations. SRG's focus is strategy, analysis, policy, and innovation.

Audience Goals: Report on System Progress

The Public Radio Audience Growth Task Force challenged public radio to pursue ambitious goals for the use, reach, and diversity of public radio’s audience.

USE Increase by half the average audience – the number of people using public radio at any given moment across the broadcast day. This means public radio will claim some 7.5 percent of all measured listening to radio.

REACH Double the weekly cumulative audience – the number of people who use public radio each week on air, online, and through other networked services. This means public radio will reach about one in five Americans age 12 and older.

DIVERSITY Triple the amount of listening by people of color to public radio, reflecting a sense of public radio as a trusted and inclusive source across racial and ethnic lines. This means a larger share of a larger audience for people of color.

The Task Force report characterized the goals this way:

These are “aspirational” goals, points of focus and motivation that, if realized, will transform public radio’s role in American life. They are not a calculated forecast based on predicted outcomes of the many measures we recommend. But neither are they a “hope and a prayer.” Rather, they reflect a consideration of public radio’s past growth, current circumstances, and many opportunities – along with patterns we see emerging as the radio industry changes its basic audience measurement tools.

In this report we review public radio’s progress toward the GROW THE AUDIENCE goals. But first, some observations about the current state of audience estimates for broadcast and other media.

Measuring with a New Arbitron Yardstick

In assessing public radio’s recent audience growth, we confront some important and complex measurement issues. Arbitron, the principle source of public radio’s broadcast audience information, is transitioning the basis of its audience estimates. In 48 of the largest 50 radio markets in the country – which account for 64% of the population 12+ – Arbitron has moved from audience estimates based on survey respondents’ reports in a paper diary to estimates based on monitoring of exposure to radio with Portable People Meters (PPM). Estimates in other markets remain based on diaries.

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The results to date of metered listening compared to diary reporting of listening indicate that people listen to radio in different patterns than they reported in diaries. In general:

- Listening is more fragmented than people reported in their diaries.
- They listen to (or are exposed to) more stations than they wrote down.
- They listen for smaller amounts of time than they say they did.

Arbitron's meters are capturing more occasions of listening to stations than people reported in their diaries. But a portion of this "new listening" is transient, incidental, or unintended, as evidenced in reports of one and only one brief occasion of listening to a station in the entire week.

At the same time, "regular listeners," those who show up in stations' audiences several days a week and make the station one of their top two or three choices, reported more listening in their diaries than is captured by the meters, as evidenced by listeners who may have reported that they listened to a station "all day," when in fact their listening was interrupted numerous times.

All together, these changes significantly reduce the average weekly time spent listening to a given station under the PPM system, and reduce the estimated average quarter hour audience.

It is important to remember that a change in measurement tools does not mean that actual use has changed, only how it is framed up. The people who are listening to public radio stations and public radio programs when Arbitron estimates their number through metering a sample are the same people who were listening when Arbitron estimated their number by asking a sample to write in diaries. The value of a radio service to those who come to rely on it is unchanged. And so on.

Measuring on New Platforms

If the changes at Arbitron are not perplexing enough, public radio must also incorporate the use of its programming and services on non-broadcast platforms into an overall assessment of audience service. A growing portion of the service public radio stations, producers, and networks offer is being delivered on platforms and devices other than AM and FM broadcasting – the Internet, mobile telephony, satellite broadcasting, and others.

The field needs reliable and uniform measurement systems to track use and performance across devices and platforms. At present, technology change and audience behavior are evolving more rapidly than the capacities of those who measure listening and use. Measurement systems now used for different platforms and devices are as different – more so – as the meters and diaries in the broadcast space.

The New Normal

In light of the above, the Task Force suggested a need for "dynamic goals" that might be recalibrated once the dust settles on a "new normal" of measurement. That is clearly the case.

We are not quite there, though, and in this first report on progress toward audience goals, we present performance in the context of the GROW THE AUDIENCE goals as originally set.

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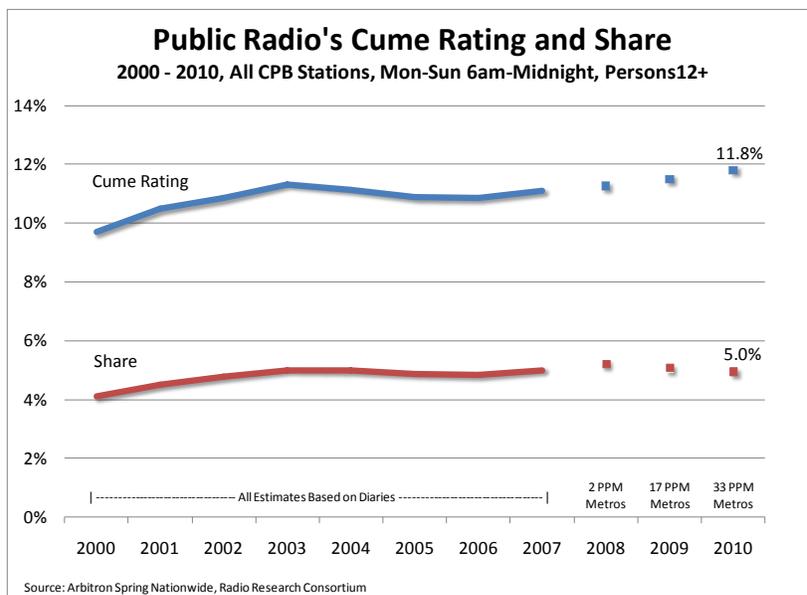
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How Are We Doing?

In 2010 more people tuned in a public radio station in a typical week and more people used public media's online services than ever before. But the amount of listening – the average audience at any one time – declined significantly, principally due to changes in measurement methodology. Compared to 2008, the percentage of Black listeners in the average audience declined and the percentage of Hispanic listeners grew.

Public radio's progress toward GROW THE AUDIENCE goals is decidedly mixed in this first accounting.

Public Radio's Place in the Market



This chart shows public radio's performance with respect to two basic broadcast measures.

In Spring 2010, public radio's **cume rating** was 11.8% – its highest rating ever. Cume rating is the percentage of the population 12 and older that tunes into public radio at least once each week.

Public radio's **share of listening** was 5.0%, 0.2% less than the high point of 5.2% reported in 2008.

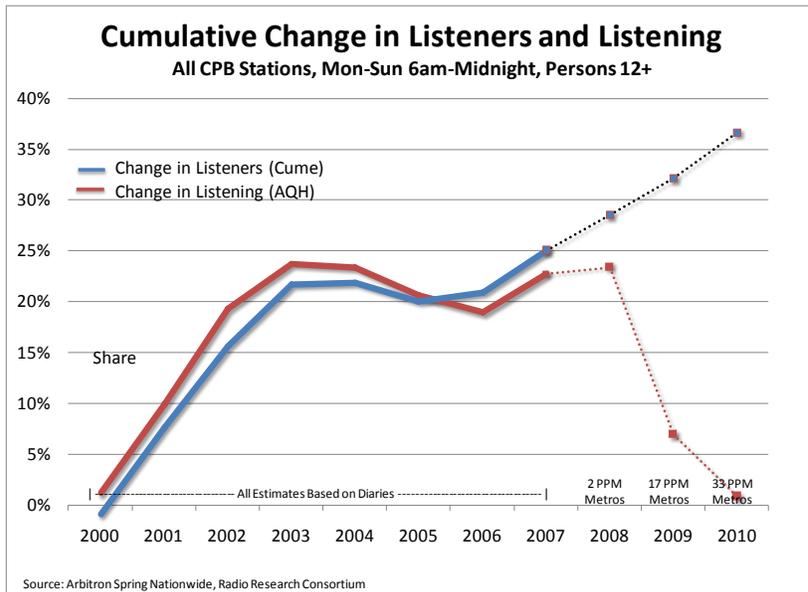
Share is the percentage of all radio listening that goes to public radio.

The chart highlights the conversion of audience estimates from diaries to meters. The solid lines from 2000 through 2007 are for a period in which all station estimates were based on diaries. The conversion to meters began in 2008 with two markets. In 2009 metered markets grew to 17 and in in Spring 2010 33 metro areas were metered.

Because the last three years each have a different measurement base, the ratings and share are shown as separate points.

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This chart shows the cumulative change in public radio’s listeners (cumulative audience) and listening (average quarter hour audience or listener hours).

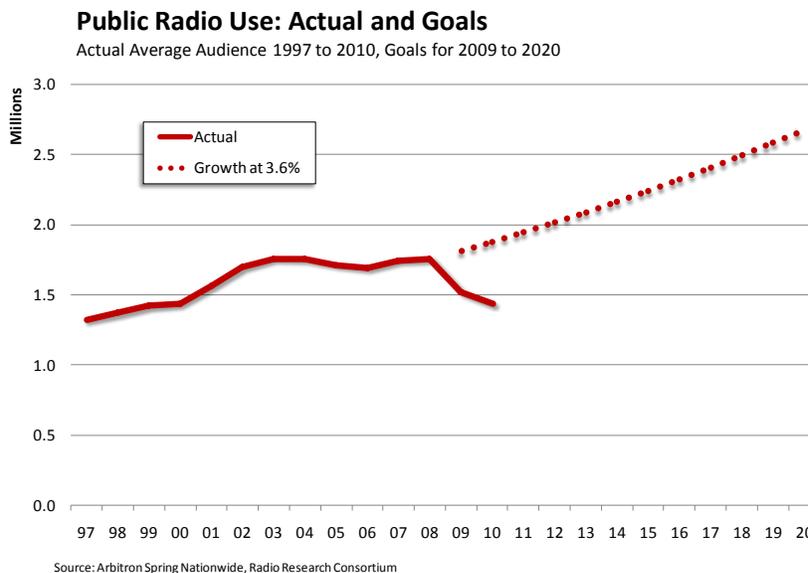
The number of listeners, the cumulative audience, has grown at a fast pace over the past three years.

The amount of listening, indicated by the average audience or listener hours, has dropped precipitously.

Both the increase in listeners and the decrease in listening are principally due to Arbitron’s change from diaries to meters.

The Goal for Use

The GROW THE AUDIENCE goal for use is to increase listening by half. This goal includes listening to public radio programming on all platforms – on-air, online, on mobile devices, and other uses in the networked environment. Current performance, at least on the broadcast platform, appears to be far off that pace.



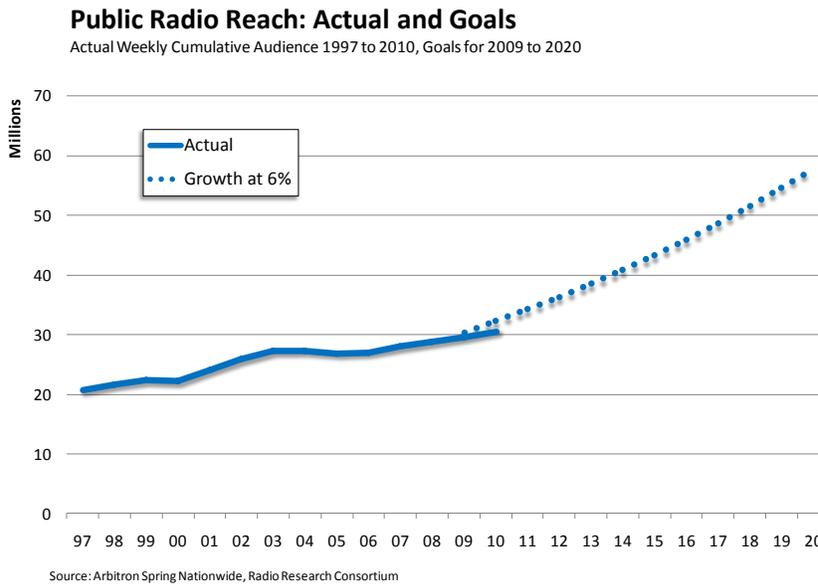
The average audience for public radio in Spring 2008 was 1.75 million people. By Spring 2010, that number dropped to 1.43 million, about the same as in 2000.

The 2010 number includes only broadcast listening. We do not yet have online or mobile listening data that can be reliably integrated with the broadcast estimates

It will clearly be necessary to recalibrate this goal.

The Goal for Reach

The GROW THE AUDIENCE goal for reach is to double the number of people who use public radio each week – on air, online, and through other networked services.



The weekly cumulative audience for public radio in Spring 2008 was 28.7 million. By Spring 2010 the number had grown to 30.6 million, the highest level ever.

That increase was below the 32.2 million needed to be on pace to meet the goal.

But these are broadcast-only figures. We know that number of people using public radio on other platforms is growing.

For example, in Fall 2008, NPR reported that there were 10 million unique monthly visitors to npr.org. By Spring 2010, that number had increased to 11.7 unique visitors. About one in five of these unique visitors listened to a public radio station in the preceding week, but the majority did not. They are coming to NPR's web site by other means, such as search.

NPR also reports growing use of its various mobile apps for the iPhone, iPad, and Android.

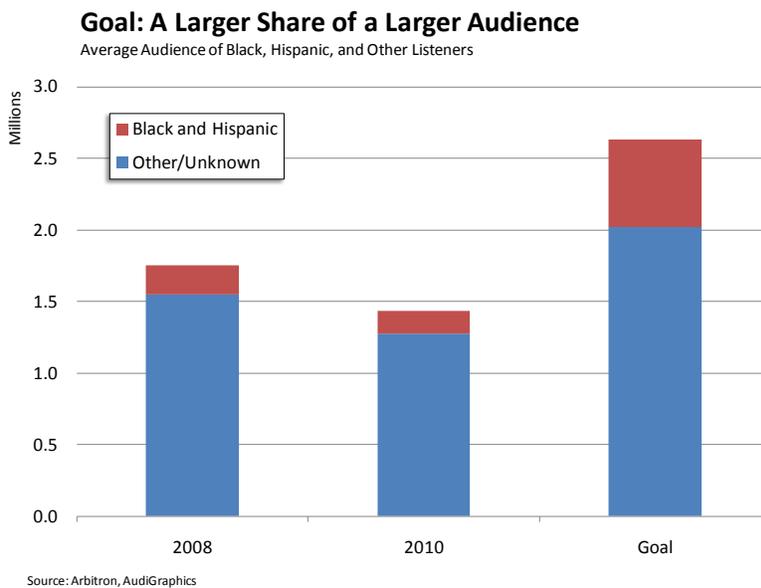
The same phenomenon is happening with visitors to the web sites of other networks, producers, and stations. Public Media Metrics reports some 5.1 million unique monthly visitors to the web sites of 70 station licensees that it is tracking.

We are not yet at a point to fully integrate these data from the networked space with the broadcast estimates. But a broad brush estimate would suggest that the system, across all platforms, is close to the growth rate needed to meet the GROW THE AUDIENCE use goal.

The Diversity Goal

The recommendation for diversity is to triple the amount of listening by people of color to public radio. At this time Arbitron only controls for Black and Hispanic listening, and only in selected markets. By five or ten years from now our ability to track listening by an array of racial and ethnic groups may have improved. For now, we have framed the goal as increasing the average audience of Black and Hispanic listeners from Spring 2008 totals of 203,700 to a target of 611,000.

Like the other measures of listening, this goal will require post-PPM-conversion adjustment.



In Spring 2010, the average audience included at least 160,800 Black and hispanic listeners.

In percentage terms, Black listeners were 6.3% of the average audience in Spring 2010, down from 7.2% in Spring 2008.

Hispanic listeners were 4.9% of the average audience in Spring 2010, up from 4.4% in Spring 2008.

The decline in Black and Hispanic listening broadly follows the decline in overall listening that is driven by the conversion to PPM measurement. But what about the decline in Black listening as a *percent* of public radio listening? We took a closer look.

There were at least 125,700 Black listeners in the average audience for public radio in Spring 2008. In Spring 2010, that number was 90,400, a loss of 35,300 Black listeners. This loss was overwhelmingly concentrated in a handful of jazz/contemporary Black music stations that had previously had the largest numbers of Black listeners in their average audience, compared to other public radio outlets. Five stations alone saw a collective loss of 21,600 Black listeners in their average audiences – over 60% of the total national loss.

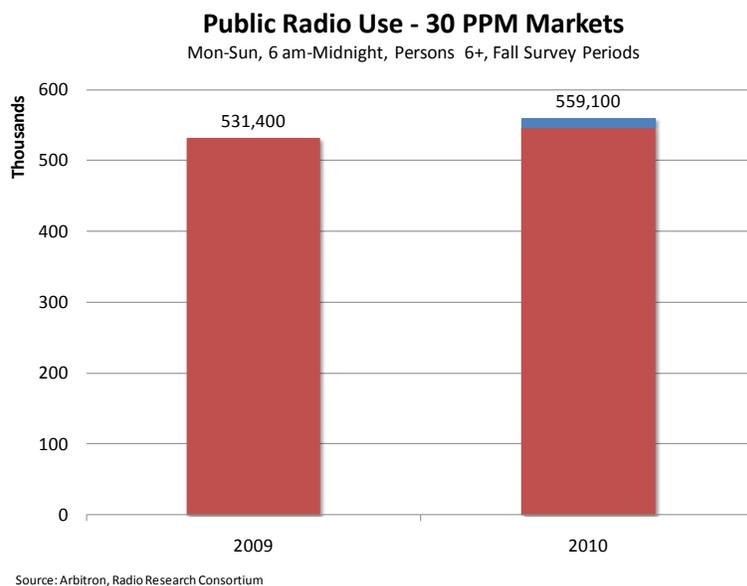
It is too soon to conclude whether this concentrated loss is primarily a result of the change in methodology (all five stations are in markets that converted to PPM) or a decline in the power of the jazz format to attract listening. Further, Arbitron PPM panels have fewer participants per market than its prior diary samples. This may introduce greater fluctuation in estimates for subsets of the audience, such as Black and Hispanic listeners.

But Wait, There's More!

The drop in reported use (average audience, or listener hours) was discouraging. First, even though we kept reminding ourselves that what we were seeing was mostly the change in Arbitron methodology, not a real change in listening, it was tough to look at those numbers fall off the cliff. Second, we were frustrated at not knowing what is really going on with this key indicator of public radio performance.

We decided to take another look.

By Fall 2009 Arbitron had converted 30 markets to PPM – together accounting for more than half the population in the U.S. We examined the listening to the more than 80 public radio stations with reported listening in those markets in Fall 2009 and again in Fall 2010. This is a true apples-to-apples, PPM-to-PPM comparison.



In Fall 2009, the average audience for public radio in these 30 markets was 531,400.

A year later, the average audience in these same markets was 559,100, an increase of 5.2%.

The majority of this growth, 2.8%, was “same store sales,” year-to-year increases for individual stations. But a portion, indicated in blue in the chart, came from three stations that

were newly acquired by public broadcasters. This combination of audience increases at existing stations and expansion of the public radio system has been the foundation of public radio’s growth for years.

We don’t want to make too much of this one-year increase. And we are still looking only at broadcast here, not listening on other platforms and channels. But perhaps we are starting to glimpse the “new normal.” And we like the direction of the change.