

NPR Activists and Classical Monks: Differentiating Public Radio Formats

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Public radio is expanding its audience service and listener support by developing multiple, differentiated formats in major markets. With funding from a consortium of public radio stations and national organizations, we conducted focus groups in eight markets to better understand the minimal audience crossover between NPR news stations and classical music stations. We segmented listeners by their tuning behavior, psychographic needs, and the gratifications delivered by NPR news and classical music formats.

Arbitron data consistently show that the majority of listeners to classical music stations, whether commercial or public, do not also listen to the NPR news station in the market. This is surprising because the two audiences have similar demographics—mature adults with high income and high education. Yet a recent analysis by Robins (2003) of six markets as varied as Phoenix, San Antonio, Buffalo, Pittsburgh, Seattle, and San Francisco found on average that only 23% of classical station listeners crossed over to the NPR news station at least once a week to hear its drive-time NPR news magazines. Put negatively, classical station listeners generally avoid NPR's in-depth news programs like "Morning Edition" and "All Things Considered."

This puzzle has both practical and theoretical implications. One of the sponsors of this study, the Station Resource Group, expressed its concerns in these terms: "Public radio is clearly moving in the direction of multiple, differentiated program streams in which focused formats increasingly stand alone on a given station's schedule or on our other delivery channels, from web streams to satellite channels. We need a sharp understanding of the unique appeal, core values, and importance to listeners of each of our major content choices" (Thomas, 2003).

Among public radio's professional researchers, terms like "appeal" and "personal importance" are concepts that have been formally explicated, then validated by empirical testing. The central work is *Audience 98*, based on a national sample of 8,000 public radio listeners who completed Arbitron diaries

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of their listening behavior as well as a psychographic survey of their values and lifestyles (Giovannoni, Peters, & Youngclaus, 1999).

Stavitsky (1995) has followed the application of audience research methodology in public radio by interviewing the professional researchers and reviewing their reports, when those reports are accessible to scholars outside of the industry. Yet much of the research commissioned by public radio networks (NPR and Public Radio International), national producers, and public radio stations has been held proprietary—mainly because the information is valuable to managers whose decisions have consequences in a competitive environment. That these research findings have informed action does not necessarily mean a lack of theoretical perspective. Consider how the uses and gratifications theory, which states that media consumers have needs (Blumler & Katz, 1974), resonates with the first principle of marketing, which is to determine the needs of your target consumer.

RESEARCH QUESTIONS

In this article we report the findings of a large-scale research study that was funded by a consortium of eight major market public radio stations (WBEZ, WNPR, KUOW, KQED, WNED, WQED, KBAQ, and KPAC), the Station Resource Group, the Public Radio Program Directors, and the Corporation for Public Broadcasting. These managers and policy makers wanted to understand why different sets of listeners are attracted to the two primary components of public radio programming—classical music and NPR news. What needs are satisfied? What are the benefits? And what is the optimal configuration of such programming within the formats of public radio stations?

FORMAT STRATEGIES

Before the rise of National Public Radio, the typical noncommercial radio station broadcast a variety of eclectic programs in a “crazy-quilt” schedule. An hour of classical music might be followed by an hour of folk music, then a university lecture followed by a radio drama. Regardless of program quality, scheduling made it difficult for listeners to find the programming that would satisfy their needs.

By 1990, leading public radio stations had matured into more coherent formats that featured the daily NPR news magazines in drive time along with large blocks of music, usually classical, during midday and evening day parts. Those stations experienced growth in audience and listener support. Giovannoni, Thomas, and Clifford (1992) classified 561 public radio stations into nine programming cohorts based on their schedules. Thirteen percent of stations were network news dominant, 26% were classical dominant and 18% fell into a classical, news, and jazz cohort. Giovannoni (1993) also asked public radio

managers to predict what their program schedules would be like in 1995. He found that stations expected to move away from mixed or eclectic formats toward more focused formats. This projection was consistent with the Corporation for Public Broadcasting's policy of expanding public radio by building multiple, differentiated services within each market.

As of 2004, dual-format stations programming both NPR news and classical music are still common in medium and small markets, but most public radio stations in major markets have adopted a single-format strategy. Stations that have committed to a coherent NPR news and information format include KPCC in Los Angeles, WBEZ in Chicago, KQED in San Francisco, KUOW in Seattle, and WBUR in Boston. Classical listeners were not left adrift, because each of those markets supports a full-time classical music station on the commercial band—KMZT in Los Angeles, WFMT in Chicago, KDFC in San Francisco, KING in Seattle, and WCRB in Boston.

In other markets, like Raleigh, San Antonio, Denver, Minneapolis, and Phoenix, where commercial radio has abandoned classical music, two public stations have taken complementary single-format positions. For example, in Raleigh WUNC dropped its remaining classical music, dedicated its format to NPR news, and encouraged listeners to tune to all-classical WCPE. In San Antonio, one entity operates two public radio stations, all-classical KPAC and all-news KSTX.

Powerful market forces are at work, as evidenced by parallel developments at National Public Radio in Washington. In February, 2002, a strategy paper written by Jay Kernis, NPR's top programming executive, leaked to the press. Kernis planned an overhaul of NPR's own music production which, he said, "has generally not been successful in terms of audience and financial performance." The reporter observed that public radio stations "have gradually been moving toward news and talk formats because they draw higher ratings and thus bigger donations during pledge drives" (Farhi, 2002, CO1).

PSYCHOGRAPHICS AND GRATIFICATIONS

In one chapter of *Audience 98*, Bailey (1999) showed that the varying appeal of different public radio stations could be measured by the psychographic composition of their audiences. Based on SRI's VALS (Values and Lifestyles) typology, classical dominant stations like KUSC in Los Angeles or WGUC in Cincinnati attracted listeners in the Fulfilled segment, while NPR news dominant stations like KUOW in Seattle or KQED in San Francisco attracted Actualizers. Such findings indicate that listeners from different psychographic segments might have similar demographics but different needs, therefore choosing different public radio formats and deriving different gratifications.

Typologies of Needs

SRI has recently revised its VALS types. Actualizers have been replaced by Innovators, described as “successful, sophisticated, take-charge people with high self-esteem. . . . Innovators are among the established and emerging leaders in business and government, yet they continue to seek challenges.” In the revised VALS system, Fulfilleds have become Thinkers, “mature, satisfied, comfortable, and reflective people who value order, knowledge, and responsibility” (SRI, 2003).

NPR’s internal research department has developed its own audience segmentation system, custom designed for radio, based on interviews with Scarborough respondents. Nixon (2001) listed three goals for NPR’s segmentation research:

- Understand audiences based on radio listening needs
- Determine underlying beliefs and behaviors that drive growth
- Create a comprehensive marketing tool applicable to the national and local level

In NPR’s custom system, the segment most attracted to NPR news is called Intellectual Challenge Demanders. They use radio as a “forum to learn.” Their political beliefs are “very liberal,” and they are active in the community. Another segment is called Background Basics Acceptors. They prefer headline news rather than NPR’s in depth magazines. Their radio listening is driven by music rather than information.

While the NPR news Demanders are “avid” supporters of public radio, the music-oriented Acceptors are less likely to send money (Nixon, 2001).

External Validity

While professional researchers continue to study how and why listeners use radio, Massey observed that scholarly researchers may have abandoned the uses and gratifications paradigm. “The major difficulty confronting the uses and gratifications approach was to provide empirical evidence of audience activity and media use, combined and contextualized. The question became one of methodology: How would a researcher measure media use and the gratifications audience members garner from that activity while avoiding the ‘sins’ of the effects researchers (e.g., artificial laboratory settings and small samples of audiences)?” (Massey, 1995).

This author agrees that a powerful uses and gratifications design should combine empirical evidence of audience activity with an open-ended, qualitative search for gratifications. To understand the empirical finding that most classical listeners do not cross over to NPR news, we designed a qualitative study. To enhance the external validity of our research design, we aggregated funding to conduct 20 professionally recruited focus groups across eight carefully selected markets.

METHOD

We started by identifying four NPR news stations, four noncommercial classical stations, and two commercial classical stations that met strict criteria. The NPR news stations had to broadcast "Morning Edition" and "All Things Considered" in prime hours, along with a strong midday component of local public affairs. The noncommercial classical stations had to program all classical music and be located in a market that included an NPR news station. The commercial classical stations had to be located in upscale markets where public radio stations had given up the classical franchise and gone all NPR news.

We also set criteria based on listenership—each station had to provide significant audience service as measured by Arbitron ratings. The NPR news stations that met the criteria were WBEZ Chicago, WNPR Hartford/New Haven, KUOW Seattle, and KQED San Francisco. The classical stations were noncommercial KBAQ Phoenix, KPAC San Antonio, WNED Buffalo, WQED Pittsburgh, along with commercial KING Seattle and KDFC San Francisco. We had deliberately factored the classical stations by quality of market—two in the thriving Southwest, two in the struggling Rust Belt, and two in Pacific Ecotopia.

Sampling

We recruited respondents on the basis of their listening behavior. To qualify, respondents had to use the target station as their primary or secondary choice. In the radio industry, these listeners are called P-1 or P-2. In each market we hired a field service to recruit respondents by using our telephone screener. In the screener, we required potential respondents to identify their listening choices on the basis of unaided recall.

Residential phone numbers were drawn from two sampling frames: For public radio stations, we processed their lists of lapsed as well as current members, deleting all fields except phone number and zip code, and drawing random interval samples. Because that sampling frame would not represent the listeners who do not contribute, in each market we set a quota of no more than 50% of respondents from station lists. The other sampling frame, quota at least 50%, consisted of lists that we purchased from field services in each market, with selection for college graduates in target zip codes. The second sampling frame insured that we also recruited listeners who were not contributors.

We conducted eight focus groups with NPR news listeners in summer 2001 and 12 focus groups with classical listeners in summer 2002. Respondents were told that they were recruited on the basis of their radio listening, but they were not informed as to the target station or the sponsors of the study. With 12 respondents per focus group, we interviewed a total of 240 listeners across eight markets.

Agenda

The moderator's agenda was divided into two main sections. For the first 45 minutes, respondents discussed their radio listening on an unaided recall basis. The moderator wanted to know not only what stations they used but why. We found that respondents had no problem expressing why they chose each station in terms of their needs and the benefits received. They told us personal stories about when and how they listened.

One particular exercise worked extremely well: The moderator asked respondents to imagine how they would feel if a given station went off the air. Depending on which station, the reactions ranged from indifference to intense anger or despair.

For the remainder of each group, the moderator exposed respondents to actual programming examples by playing air checks from distant unfamiliar stations as well as local familiar stations. For example, respondents in Phoenix were exposed to air checks of classical programming from San Antonio, Buffalo, Pittsburgh, Seattle, and San Francisco, as well as Phoenix. These air checks stimulated more detailed, deeper, and grounded expressions of how listener needs may or may not be satisfied by radio programming.

Findings

In focus group research, the data consists of verbatims—what respondents had to say in their own words. In this study it was not difficult to understand what respondents were saying about their gratifications because we heard remarkably consistent verbatims from group to group, and across markets. That is, the NPR news listeners in Chicago talked about WBEZ in the same way that Seattle listeners talked about KUOW. The classical fans in Phoenix talked about KBAQ the same as WQED listeners in Pittsburgh. We found no differences from market to market, even though we had deliberately traveled to very different kinds of markets, such as traditional, downscale Pittsburgh vs. progressive, upscale San Francisco.

We regard that consistency across stations and markets as support for the external validity of our findings. We also recognize that consistency is the consequence of strategic decisions by public radio's national policy-makers and station managers. Stavitsky (1994) observed that although the idea of local service was fundamental to federal licensing of broadcast stations, public radio has moved beyond geographic conceptions of locality to target a national and dispersed community of the mind, defined by shared interests, tastes, and values. An NPR partisan in Chicago has more in common with NPR partisans across the country, than with neighboring Chicagoans of a different mindset. We found that NPR news listeners have the same needs and seek the same gratifications wherever they live. Similarly, we found that classical listeners are the same, regardless of where they live. With reference to how they use radio formats, their location is cerebral rather than geographical.

Selected NPR News Verbatims

In this brief article, we cannot transcribe the hours and hours of verbatims—respondents explaining their needs and gratifications in their own words. We can only document the key findings. For one example, we found that the needs of NPR news listeners cannot be satisfied by commercial AM news stations:

"It depends on your personality. If you really want some serious depth, you'd want WBEZ because it's the best local journalism as well as a lot of national and international. If you don't have the patience for that and you're more of a grazer you'll want WBBM or the WMAQ. It really depends on you."

"The news we listen to today so often is purchased by every nickel and dime of advertising and controlled by advertising and the integrity is vacant from our news. KQED comes off to me as being a very, very strong integrity—sort of bringing the news without any outside influence."

"They take more time and give you a full-depth interview on something, or a discussion or something and to me . . . Good news is something I can use, something I find interesting rather than something like the latest shooting out in the central area, which I really don't want to know about thank you."

"But I think that their whole purpose is they want to bring up subjects that can help people become better people and make the world a better place. Not too many other stations have that."

Studying the videotapes, we concluded that "making the world a better place" or what we called activism is the key to understanding the gratifications associated with NPR news. NPR Activists care about social, environmental, and economic problems, and they seek solutions. Most importantly, they think about problems on a global level, and NPR's global perspective delivers information and analysis that they can use in their activism.

Selected Classical Music Verbatims

Again, we do not have room here to quote hours and hours of verbatims. Most importantly, we found that classical music listeners, in sharp contrast to NPR Activists who engage with the troubled world, use the classical music format to relieve stress—an escape from contemporary problems. The classical listening experience was described in meditative, interior terms:

"A necessity for my soul."

"Relaxing, calming, sailing."

"Quiet forest meadow on a spring day."

"[You] can get away from the bad things of the real world, such as anything negative."

"You know what? It's just soothing. You know, we all live in such a fast-paced world that you get in the car and you're driving along and it helps you. It helps you clear your head for a moment, whatever stress you have before you get to work. And after work, it's the same thing."

"Well, sometimes when I'm really stressed or something I can just kind of turn it on and listen to it and close my eyes and let the music float me away, and it takes me out of the stress and so I can come back to it kind of renewed, and pick up what I left off."

Although the primary gratification of classical listening is stress relief, we found that a strong secondary gratification is clarity of mind.

"Classical music is the soundtrack to my soul, above all other kinds of music, it centers me when I am upset or stressed, introspection."

"I think classical music requires more of you. It requires more of you, as a listener. So when you talk about 'Warm106.9' that's mindless stuff. It's soda pop, in comparison to a deep cup of espresso or a really fine wine."

"It's intellectually interesting music and if I want to focus on it that way, I can. Or if I just want to be calmed and just enjoy the music, I can do that too."

"It helps you tie into what you're doing, whatever it is. If it's writing, if it's doing whatever, because the flavor of the task, whether it's carving wood or sanding or painting something or being precise, or whether it's writing a poem and you just need the feeling."

Respondents explained that classical music, in sharp contrast to easy listening or soft rock formats, had the qualities of intricacy and intelligence. It did not matter what task had to be done, whether entering formulas into a spreadsheet or fine woodworking, classical music focused the mind. Because they use the format to escape from the troubled exterior world and seek an interior serenity, we decided to call these listeners Classical Monks.

CONCLUSIONS

Market to market, the respondents who populated our classical focus groups revealed themselves to be strikingly different from the NPR news respondents, not only in their empirical patterns of radio listening but also in their psychographic orientation toward life. Keep in mind that these two types of listeners cannot be distinguished on the basis of simplistic demographics like age, income, and education. Yet they are sharply differentiated by their needs and gratifications.

NPR Activists	Classical Monks
Solve Problems	Escape Problems
External Relations	Internal State
Discourse Debate	Minimal Talk
In Depth News	Just the Facts
Reason Logic	Beauty Emotion
Political Action	Seeking Serenity

We distilled our findings into a chart that contrasts the core values of two segments of radio listeners:

In any market the NPR news station and the classical station will both attract highly educated, upper income, adult listeners—demographically the same target. But their contrasting needs and gratifications can explain why there is limited cume duplication (crossover audience) between all-classical and NPR news formats. Given a clear choice, the two psychographic segments of listeners will seek out and become loyal to different stations.

Our research explains the inherent limitations of trying to schedule two different formats, with different gratifications, on a single public radio station in different day parts, even though both formats appeal to highly educated adults. Strategically, public radio will take action based on this research by building two or more clearly differentiated channels in every market, so that each format can be fine-tuned to deliver gratifications to distinct psychographic segments of public radio listeners.

Our findings also help to explain how commercial and public radio stations compete for listeners. We found that from the perspective of NPR News listeners, there is a sharp, high contrast differentiation between the commercial AM news format and the intelligent, in-depth journalism on public radio. But from the perspective of classical music listeners, it does not much matter whether their local classical station is commercial or public, because the uses and gratifications are the same.

For future research, we are studying the uses and gratifications of the mainstream jazz format. We recently conducted focus groups in four large markets where public radio stations have adopted the mainstream jazz format, which has been abandoned by commercial radio. Multiple, differentiated public radio formats in each market will expand audience service and increase public support.

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