

grow the **audience**  
for public radio

# Performance of Public Radio News Stations

June 2011

Station Resource Group  
Walrus Research

Corporation for Public  
Broadcasting

**A short list of commonly carried national programs drives much of the listening to public radio news stations, but there are huge differences in the performance of this format across the country.**

In 2008 the Station Resource Group and Walrus Research reported the performance of public radio news stations in 30 large markets. We reviewed the significant differences in audience impact among these stations, explored factors that predicted those differences, and flagged a few top performers that might point the way for others.

We are returning to those questions, and others, with new audience estimates, a new audience measurement system (the Portable People Meter), and a larger set of markets and news stations to explore.

In this first report we take a quick look at the news “franchise” in the top markets to set the stage for our questions. We will continue with three additional reports:

- Predicting the audience for news stations
- The relationship between audience and listener support
- Does the size of the local news staff matter?

Reports and notes on methodology are available on the GROW THE AUDIENCE website: [www.srg.org/GTA](http://www.srg.org/GTA)

Tom Thomas & Terry Clifford  
Station Resource Group

George Bailey  
Walrus Research

## PUBLIC RADIO NEWS STATIONS: The Sample for Our Study

In 2010 most large radio markets had at least one public radio news station – a number had two.

This chart, arrayed by market size, shows shares of listening to public radio news stations in the markets measured with Personal People Meters (PPM) by Summer 2010.

The bars with two colors show markets with two news stations. Each portion of these bars shows the share of a different station.

Our study includes:

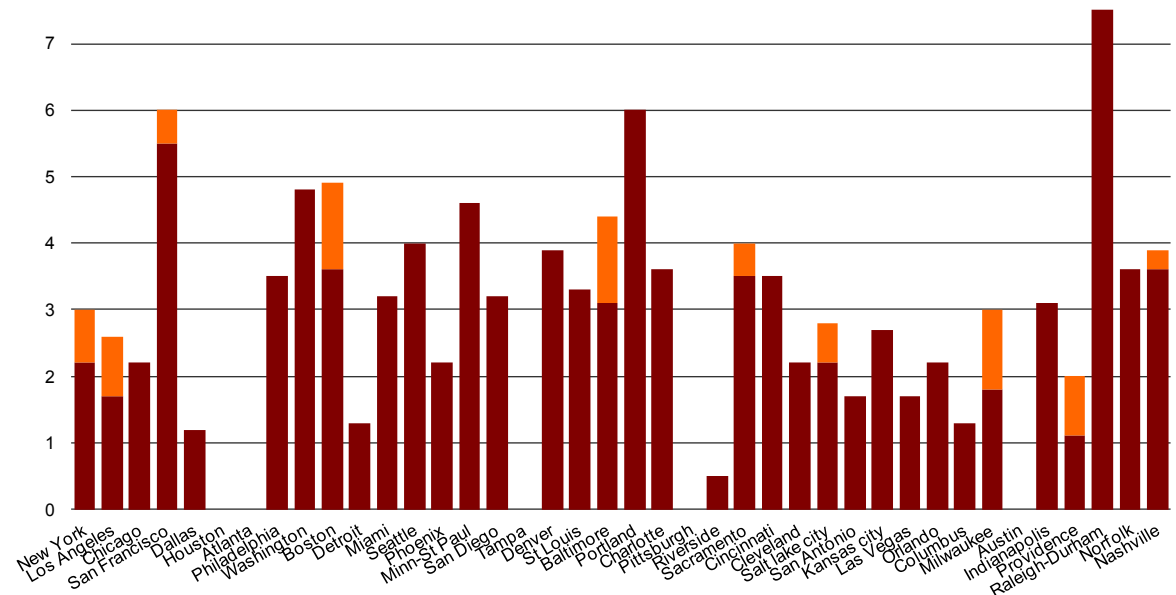
- Stations that offer a predominately news/talk schedule on weekdays from 6am-7pm.

To sharpen the analysis we included only those stations that:

- Carry *Morning Edition*.
- Are home to a PPM market
- Have at least a 0.5 share in their home market.

### News Stations: Top Markets

Share of Listening, Metro Survey Area, Fall 2010



Source: Arbitron; Radio Research Consortium

Houston, Atlanta, Tampa, Pittsburgh, and Austin did not have an “all news” public station as of this study. Some stations shown above are not included in our statistical analyses. WUOM in Detroit is not home to that market. KQEI, the smaller station in Sacramento, repeats KQED from San Francisco. WAMU Washington also has a substantial share in Baltimore; the same is true for WGBH Boston in Providence. We analyzed their metro share and rating only in their home markets to predict audience performance. But we analyzed their entire audience to predict listener support. WPLN-AM repeats WPLN-FM (both in Nashville) and the two are combined in the study.

## STATION SHARES: Exclusive Franchise

The first steps in our analysis are:

- Sort stations by whether or not they have an exclusive claim to the public radio news franchise in the market.
- Rank them by the share of listening they capture in their respective markets.

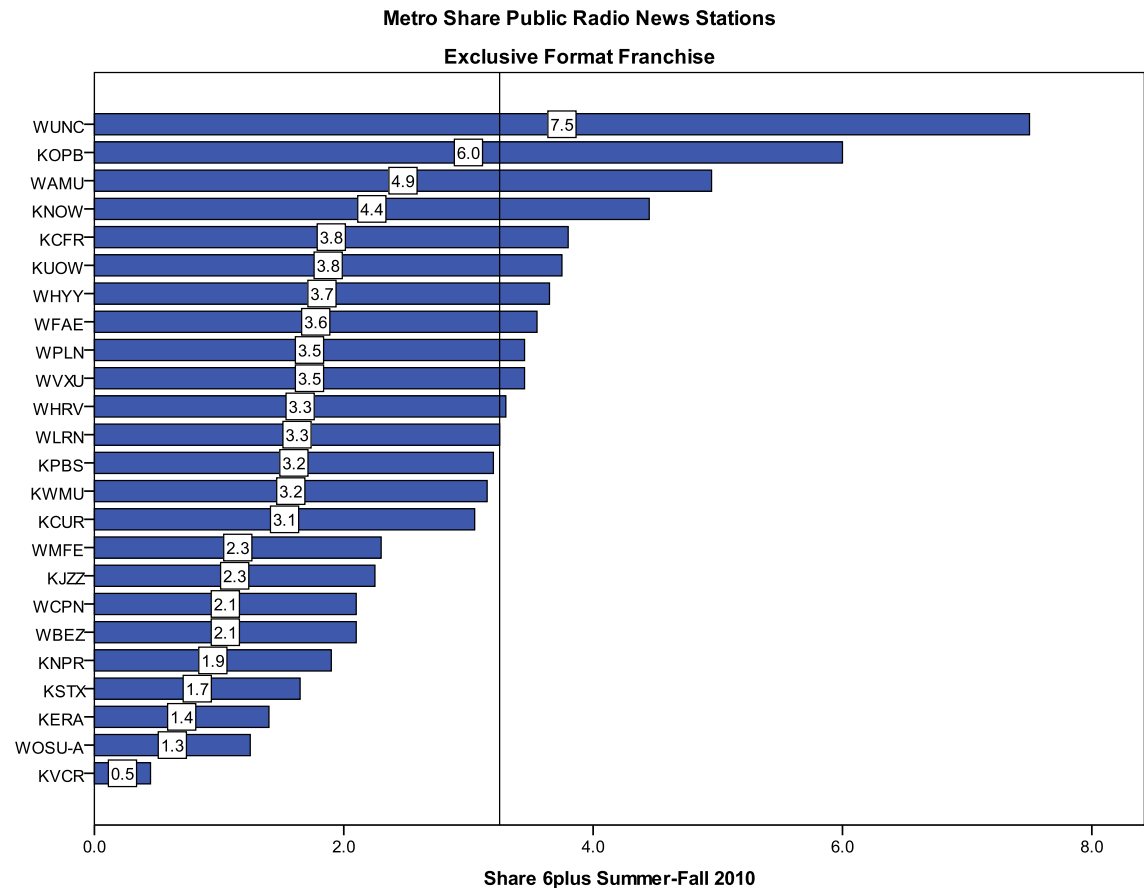
The chart shows 24 public radio news stations with an exclusive franchise for public radio news.

There are major differences in the share of audience among stations with the “exclusive franchise.”

WUNC tops the chart with a 7.5 share in Raleigh-Durham.

The median of the group is a 3.3 share for WLRN, Miami.

The lowest share is 0.5 (our cut-off point for inclusion) at KVCR Riverside, CA.



## STATION SHARES: Shared Franchise

Here are 13 stations that have direct format competition – a “non-exclusive” franchise for public radio news.

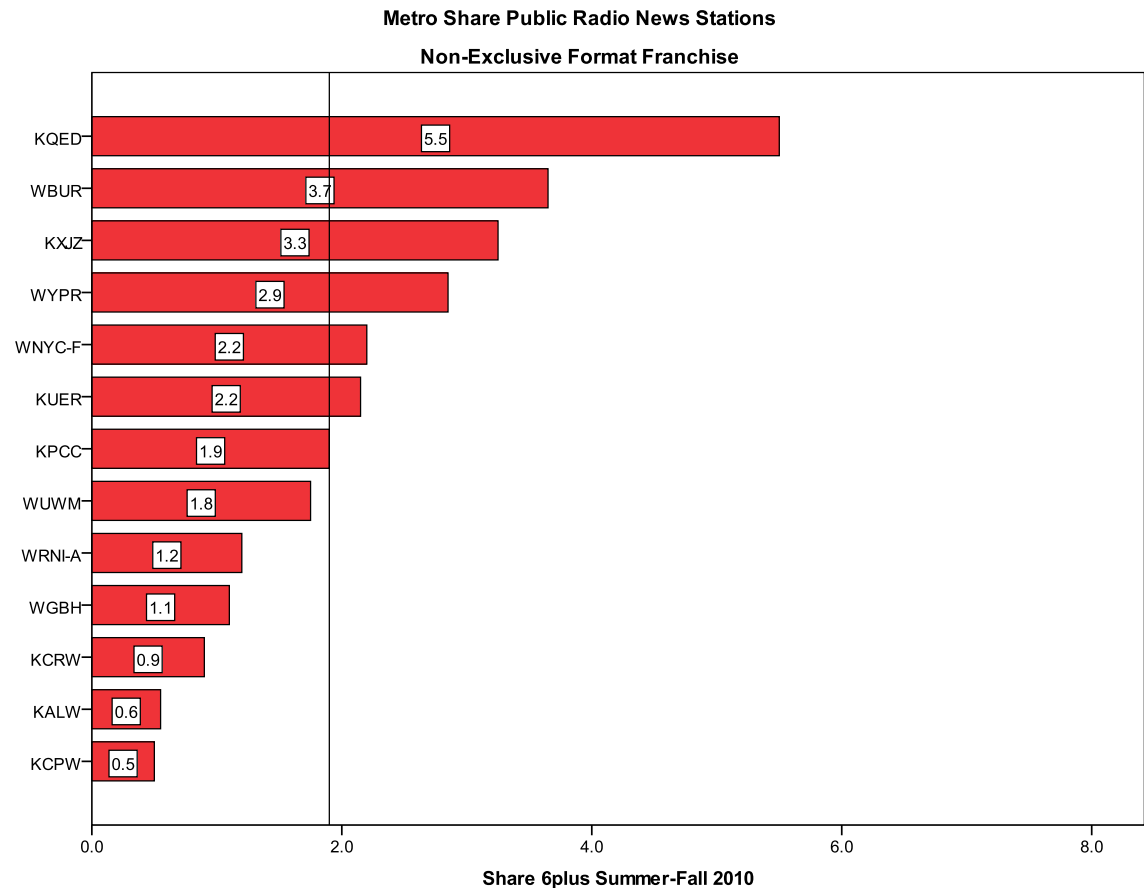
There are significant differences among these stations, too.

The top station is KQED with a 5.5 share in San Francisco. San Francisco is also served by KALW.

The median is KPCC with a 1.9 share of listening in Los Angeles.

The lowest share in this group is 0.5 for KCPW in Salt Lake City.

The chart uses the same scale as the previous one, to illustrate generally lower shares in this group.



Note: WUWM has news competition from Wisconsin Public Radio’s WHAD, although WHAD does not carry *Morning Edition* or *All Things Considered*.

WNYC FM has competition from sister station WNYC AM, although AM does not carry *Morning Edition*.

## SHARE AND REACH: A Close Fit for the Public Radio News Format

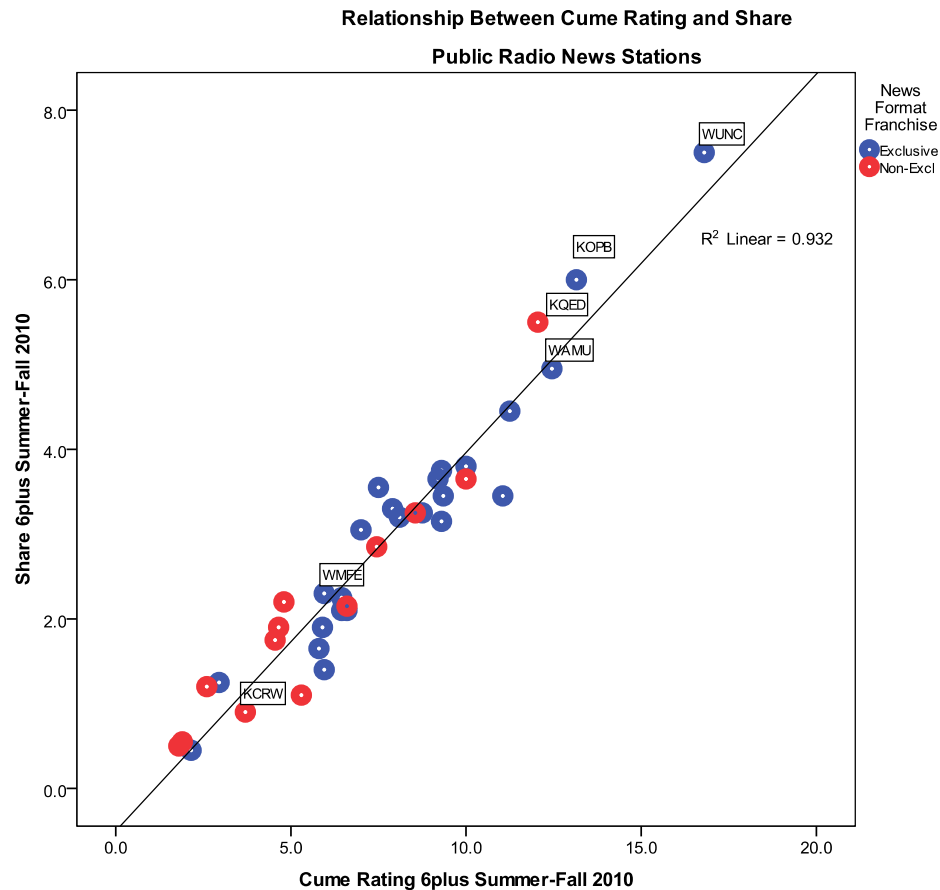
Strategies to increase share and strategies to increase reach are closely aligned for public radio news stations.

This chart illustrates a nearly perfect correlation between reach (cume rating) and share. Over 93 percent of the variance in share is explained by the cume rating.

In effect, they are measuring the same thing for this format: the stations' public service relative to their markets.

WUNC is the leader in both share at 7.5 and in reach at 16.8. KCRW has a 0.9 share and 3.7 reach.

Some believe that programmers must make a choice between working to increase their station's reach or going for a larger share. For the public radio news format, it amounts to the same thing.



## Coming Next

In our next report we will examine factors that explain much of the dramatic differences in reach and share seen among these public radio news stations.

We will then turn to the relationship between audience size and individual giving – how much do the differences in the size of a station’s audience translate to differences in the amount their listeners give?

Our final report in the series will look at whether the size of a news station’s newsroom affects the size of its audience and the amount of its support from listeners.

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# Performance of Public Radio News Stations

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## Predicting the Audience

June 2011

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Corporation for Public  
Broadcasting

**Successful public radio news stations have large and loyal audiences. The most powerful predictor of audience share for a public radio news station is the percent of core listeners in its audience.**

There is an enormous range in the performance of public radio's news stations across and within top markets. Using basic metrics of the public's use of programming – share (the percent of all listening in a market captured by a given station) and reach (the percent of the market's population that tunes in during a week) – we see differences of 10 to 1 and more.

What explains those differences? There are undoubtedly many contributing factors unique to each station – the strength of an exceptional local host, an especially successful commercial competitor, and so on.

In this report we use advanced statistics to examine common factors that can be measured across all markets to sort out how much such factors contribute to a public radio news station's performance.

Our examination focuses on 37 news stations in markets measured by Personal People Meters as of summer 2010.

This report is part of a series examining the performance of public radio news stations. Reports and notes on methodology are available on the GROW THE AUDIENCE website: [www.srg.org/GTA](http://www.srg.org/GTA)

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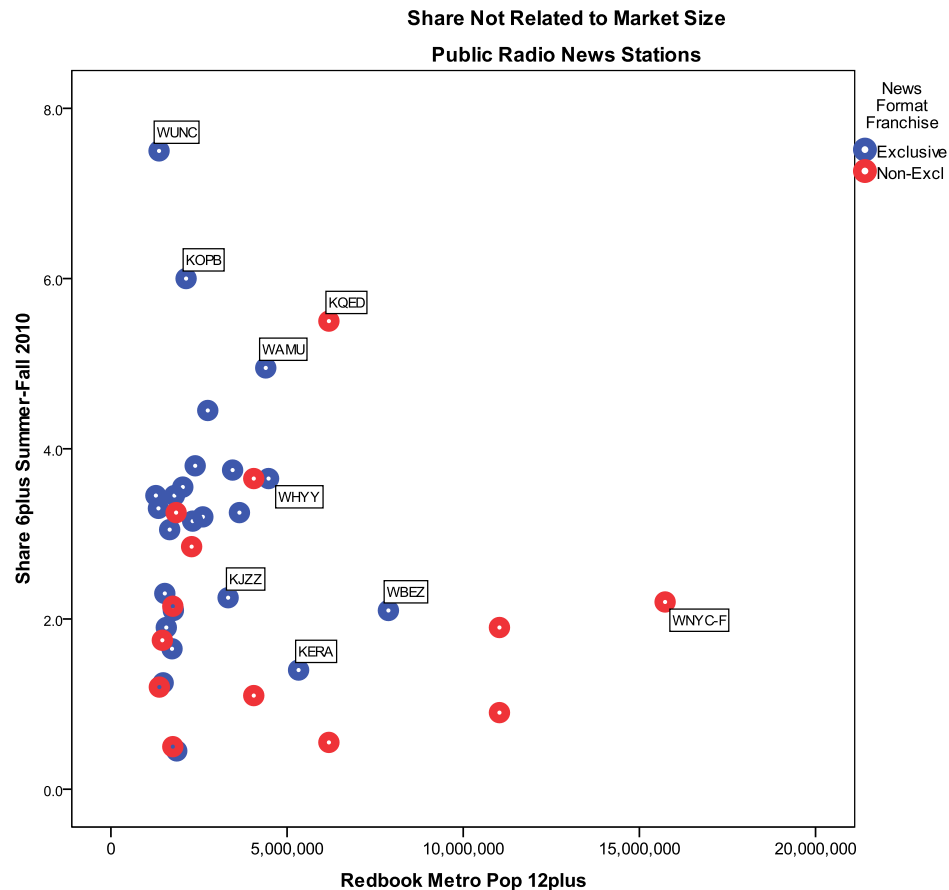
## MARKET SIZE: No Relationship

A common assertion is that it is harder for a public radio news station to capture audience share in larger markets.

Anecdotally, there are a couple of stations that appear to illustrate this theory, such as WNYC New York and WUNC Raleigh-Durham. But when we examine the full sample of these stations, it turns out not to be the case.

Statistically, there is no significant correlation (thus no “best fit” regression line or correlation coefficient) between the size of a public radio news station’s market and its audience share.

WAMU Washington, WHYY Philadelphia, KJZZ Phoenix and KERA Dallas serve about the same populations yet have very different audience shares.



X axis is metro market population

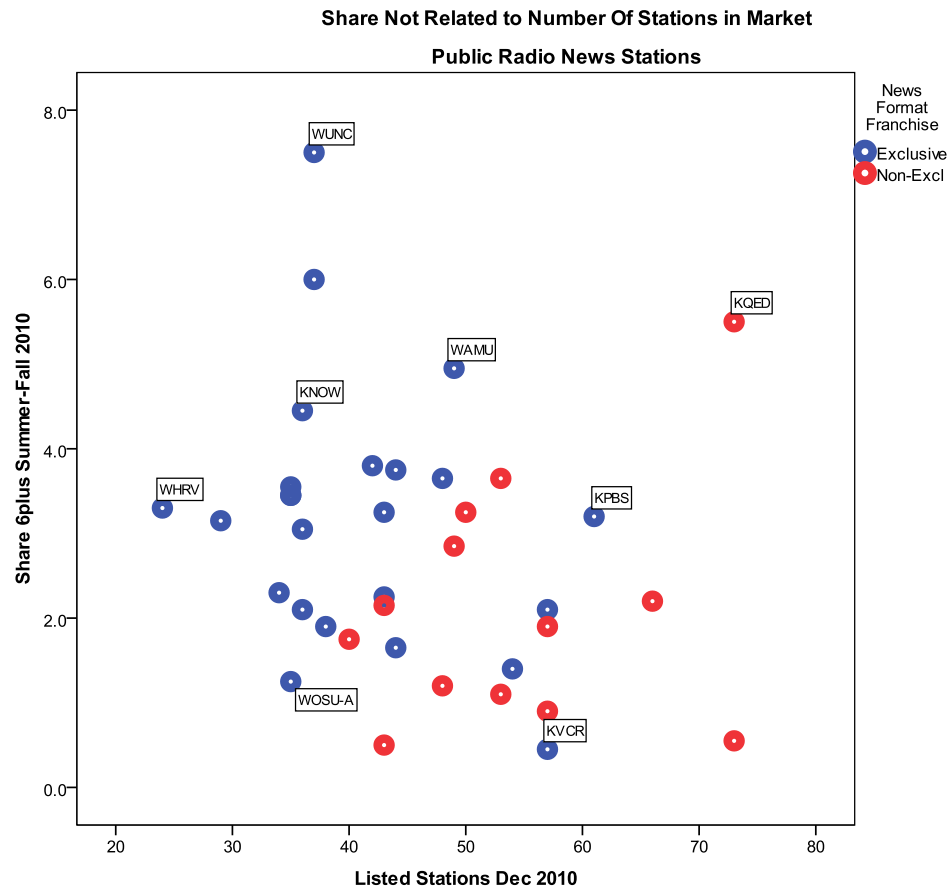
## NUMBER OF STATIONS: No Relationship

A variation on the market size theory is that stations' shares are strongly shaped by the number of stations in the market.

Our analysis finds no statistically significant correlation between public radio news station share and the total number of stations in the market.

Arbitron lists over 70 stations in San Francisco, yet KQED captures a 5.5 share.

Raleigh-Durham, Minneapolis-St. Paul, and Columbus, OH all have about the same number of stations (mid-30s), yet WUNC's share is 7.5, KNOW's share is 4.4, and WOSU-AM's is 1.3.



X axis is number of stations listed in PPM ratings

## MARKET ATTRIBUTES: College Education

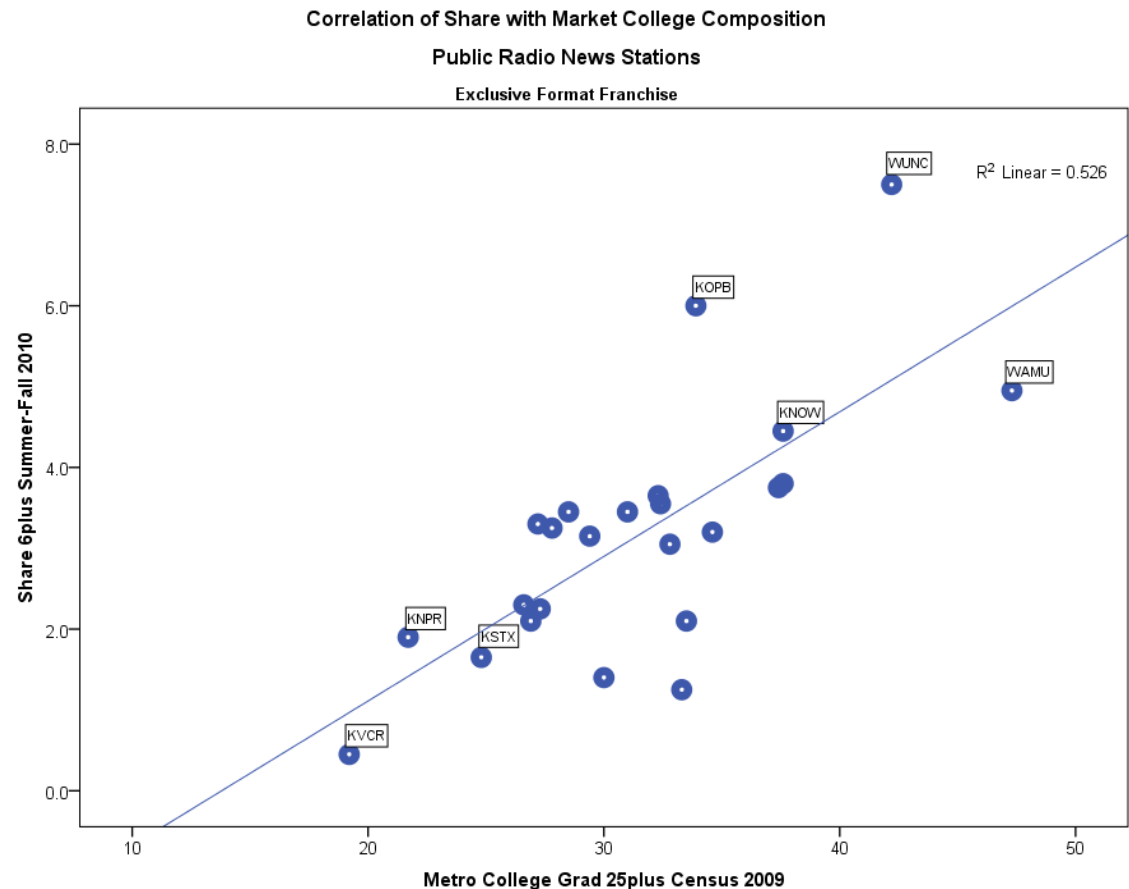
Population characteristics do matter – some markets are fertile ground for public radio news

The best market predictor of news station performance is the educational level, specifically the percent of college graduates. This factor – alone – explains just over half the variance in share among these stations (the R-square is .526).

This chart shows share by market college composition of people 25 years old and older.

Raleigh (WUNC) has 42 percent college grads; Washington DC (WAMU) has 47.

San Antonio (KSTX) has 25 percent, Las Vegas (KNPR) 22 percent, and Riverside (KVCR) has 19 percent.



X axis is metro college graduate composition 25 plus

Only exclusive franchise stations displayed here

## MARKET ATTRIBUTES: Values and Lifestyles

What about VALS? The NPR Handbook describes NPR listeners this way:

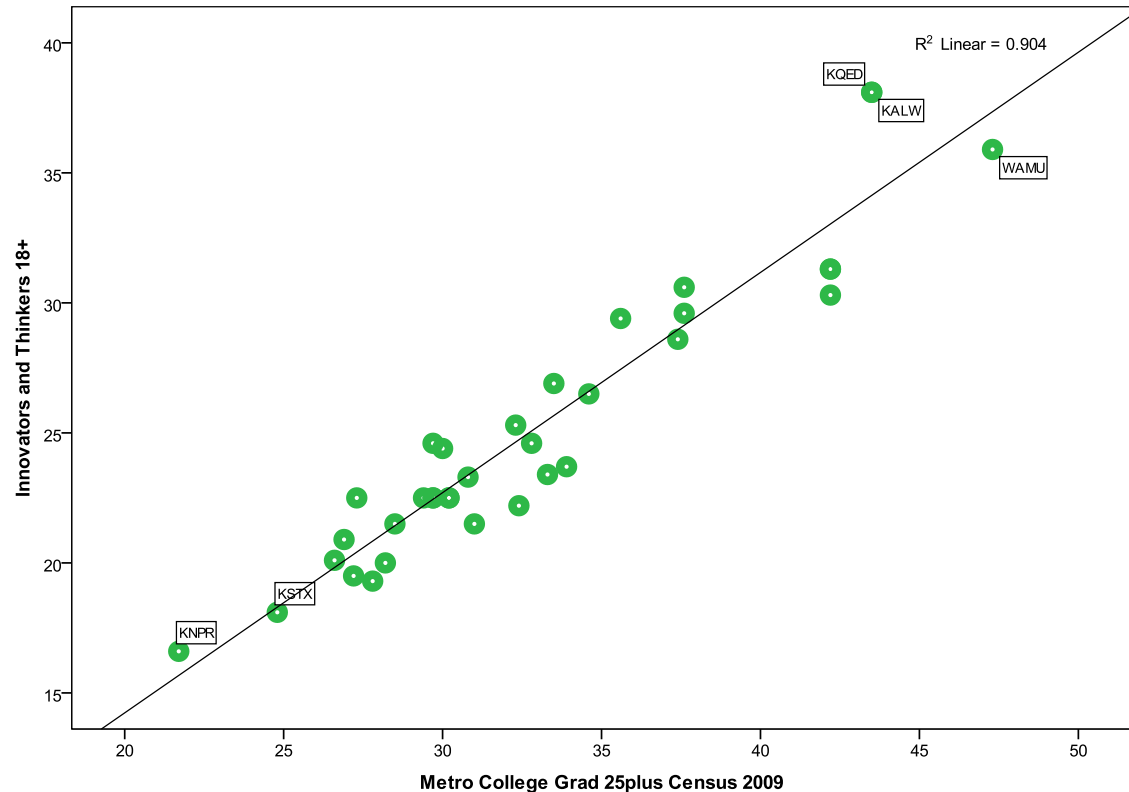
“... typically have a higher level of education ... are committed to learning throughout their lives.”

“... are more likely to believe that equal opportunity and working for the welfare of society are very important and they are more likely to recycle and feel that preserving nature is very important.”

“... are active and involved members of their community. Whether through voting, community service, or attending public meetings.”

VALS composition of a market correlates highly with news station audience shares. But the presence of VALS types most attracted to public radio news, Thinkers and Innovators, correlates highly with market education levels. Once we control for education, VALS does not add predictive power. This is a change from earlier studies.

Correlation of VALS with Market College Composition  
Markets Served by Public Radio News Stations  
Innovators and Thinkers



X axis is metro college graduate composition 25 plus

Y axis is market composition of Thinkers and Innovators 18 plus

To learn more about VALS, go to [www.sric-bi.com/VALS](http://www.sric-bi.com/VALS), the website of SRI Consulting Business Intelligence, Menlo Park, CA 94025

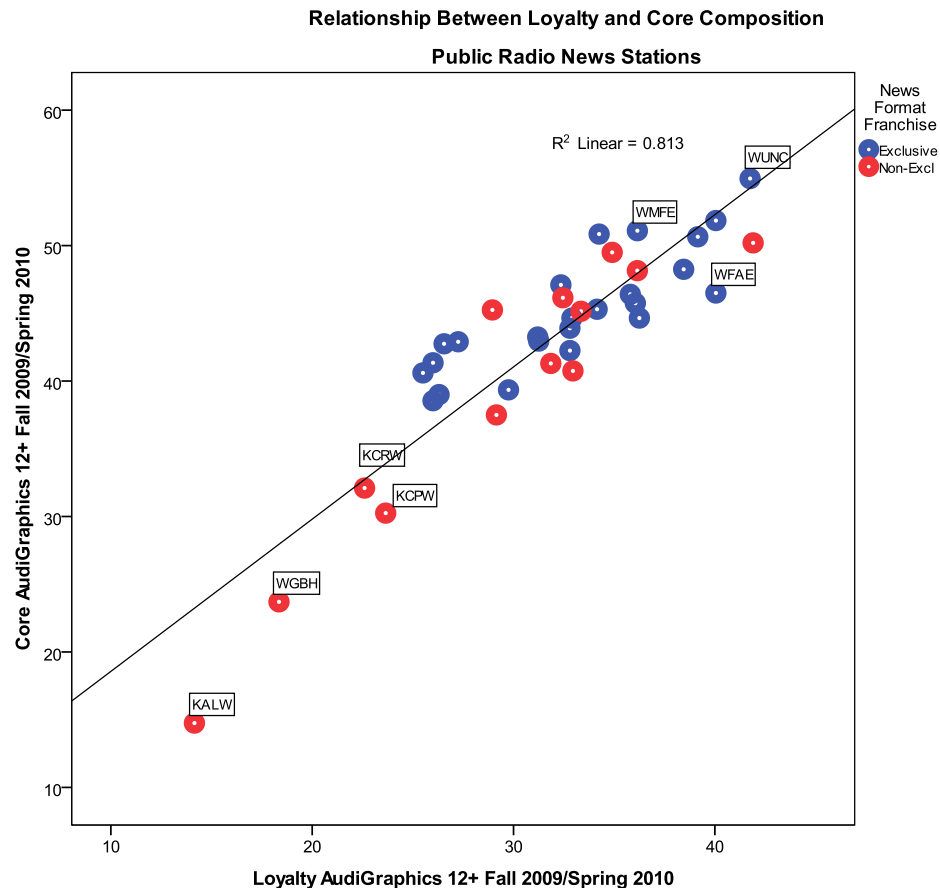
## PATTERNS OF USE: Loyalty and Core Composition

Our 2008 study stopped with market factors. This time we decided to look at the internal dynamics of a station's listening audience – the patterns of use.

We focused on two critical measures of a station's value: **Loyalty** – the percent of the audience's total radio listening that goes to the station; and **Core composition** – the percent of the audience that uses the station as their first preference, more than any other station.

This graph illustrates the strong correlation between loyalty and core composition.

Loyalty and core composition both indicate the value of a station's programming to listeners. WUNC has 42 percent loyalty, 55 percent core composition. KALW has 14 percent loyalty, 15 percent core listeners.



X axis is percent Loyalty among listeners 12 plus

Y axis is percent Core composition

AudiGraphics Fall 2009/Spring 2010

## PREDICTING AUDIENCE: Statistical Model

We found three variables that, together, predict performance of public radio news stations:

- Core Composition of Cume
- Market College Grad Composition
- News Format Franchise

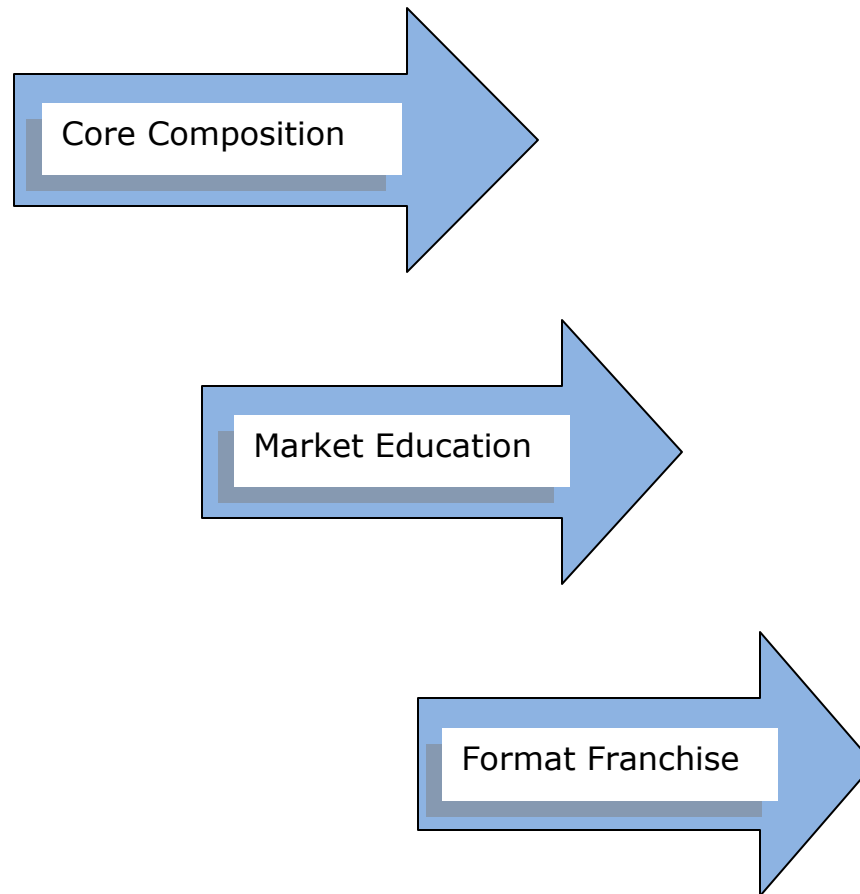
Together they account for 72 percent of the variance in shares.

A station can't change attributes of its market's population.

Having the exclusive news format franchise is valuable, but also not usually under a station's control

What stations can do is create programming that generates dedicated listening, a format that increases core composition.

That, it turns out, is the most powerful of these three elements in predicting the difference in news station performance.



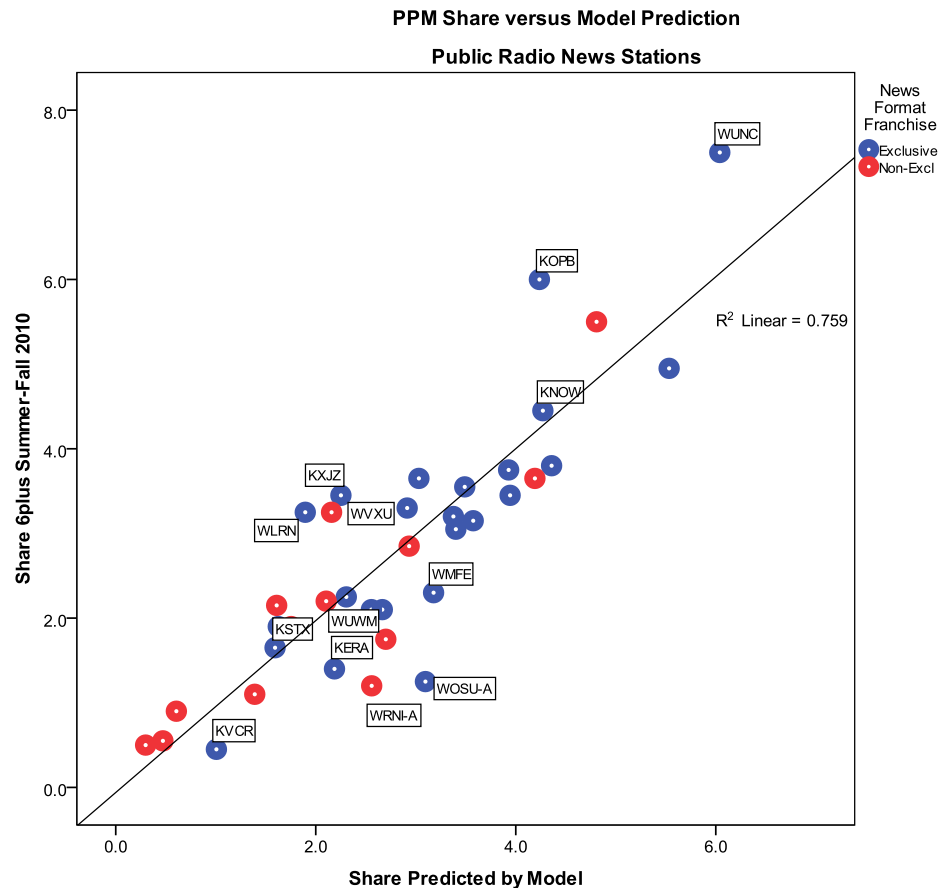
# PREDICTING AUDIENCE: The Model v. Actual

Most stations' actual audience share is very close to what we predict using three variables we can measure. Of all the differences among stations' shares, almost three quarters of the variance is explained by the statistical model.

The diagonal line indicates a "perfect fit." Most stations are fairly close to it – at low, medium, and high audience shares.

The audience shares for 27 of the 37 stations in the sample fall within one standard deviation of their predicted value.

Still, some stations have shares that are significantly above or below those predicted, such as WUNC above the line and WOSU-AM below it. We will look at them next.



## THE OUTLIERS: What Can We Learn?

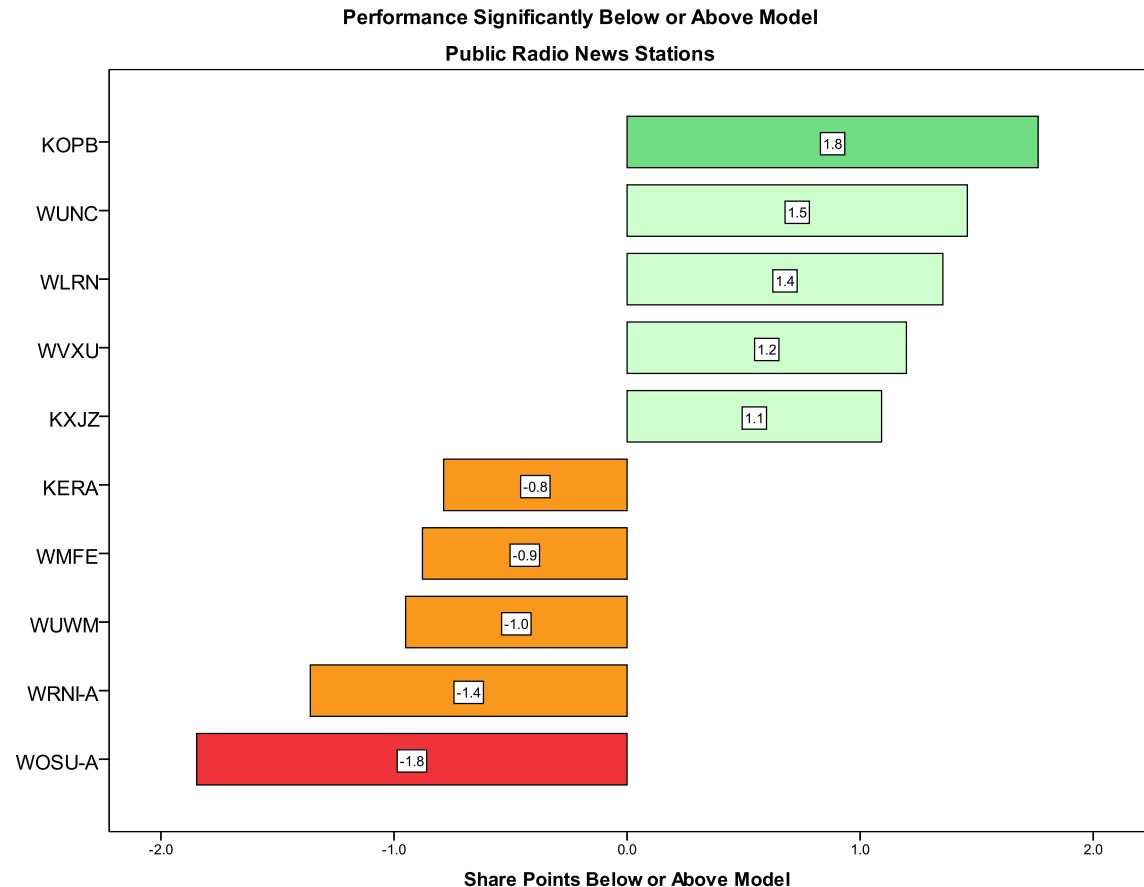
Here are the stations that perform significantly better or worse than the prediction.

Perhaps we can learn from these.

Most obvious is the adverse impact of being on the AM band, as seen with WRNI and WOSU.

Portland is a “cool” market with its unique mix of progressive and libertarian politics and a vibrant arts scene. (Austin’s KUT was not included in this study because it has a mixed format, but KUT approaches a 9 share.)

It is more difficult to come up with explanations for why WVXU overperforms and WUWM underperforms – given that Milwaukee and Cincinnati have a lot in common as older Midwest markets.



## METHODOLOGY

For this analysis we identified public radio news stations that met the following criteria:

- Offered news/talk programming 75% or more of the time on weekdays 6am-7pm
- Broadcast *Morning Edition*
- Home to a PPM market as of Summer 2010
- At least a 0.5 PPM share in its home market

We measured the performance of each station in terms of audience variables related to public service.

For metro estimates such as AQH share and cume rating, we used PPM data for July-December 2010.

For total audience estimates such as loyalty and core composition, we used AudiGraphics data for Fall 2009/Spring 2010.

For stations with in-market repeaters, we aggregated all listening in the market.

We classified each station with reference to competition from other public radio stations – whether the station had a market exclusive franchise for *Morning Edition* or for the defined public radio news format.

We used SPSS to run partial correlations and linear regression. We found that the audience share for public radio news format stations could be predicted by the combination of three variables:

Model Summary<sup>d</sup>

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.633 <sup>a</sup>	.400	.382	1.2262
2	.838 <sup>b</sup>	.703	.684	.8764
3	.864 <sup>c</sup>	.746	.721	.8232

a. Predictors: (Constant), Core AudiGraphics 12+ Fall 2009/Spring 2010

b. Predictors: (Constant), Core AudiGraphics 12+ Fall 2009/Spring 2010, Metro College Grad 25plus Census 2009

c. Predictors: (Constant), Core AudiGraphics 12+ Fall 2009/Spring 2010, Metro College Grad 25plus Census 2009, NPR News Format Franchise

d. Dependent Variable: Share 6plus Summer-Fall 2010

Over 70 percent of the variance in station performance can be predicted by their core cume composition, the market's composition of college graduates and direct format competition from another public radio station.

## Coming Next

The next report in this series will explore the relationship between audience size and individual giving – how much the differences in the size of a station’s audience translate to differences in the amount their listeners give.

Our final report in the series will look at whether the size of a news station’s news staff affects the size of its audience and the amount of its support from individuals.

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# Performance of Public Radio News Stations

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## Individual Giving

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Broadcasting

**The way to build listener income for public radio news stations is to build the number of core listeners – extending the reach of the station while maintaining high core composition.**

Individual giving is the largest single source of support for most public radio news stations. At a time when other sources of funds are uncertain, it is all the more important to understand the audience drivers of listener income.

Multiple studies have documented the basic equation of listener support:

- Giving begins with listening – regular use of the service.
- The importance of the programming to the listener comes next.
- Then, is it clear that the station needs support, that a personal gift will make a difference?
- Lastly, the listener needs to have some money to give.

SRG and Walrus Research took a close look at the relationship between audience and giving in the 2008 report *Individual Giving to Public Radio*.

<http://www.srg.org/funding/Giving.html> This updates the analysis, looking at the giving relationship between public radio's news stations and their audiences in the markets measured by Personal People Meters as of summer 2010.

This report is part of a series examining the performance of public radio news stations. Reports and notes on methodology are available on the GROW THE AUDIENCE website: [www.srg.org/GTA](http://www.srg.org/GTA)

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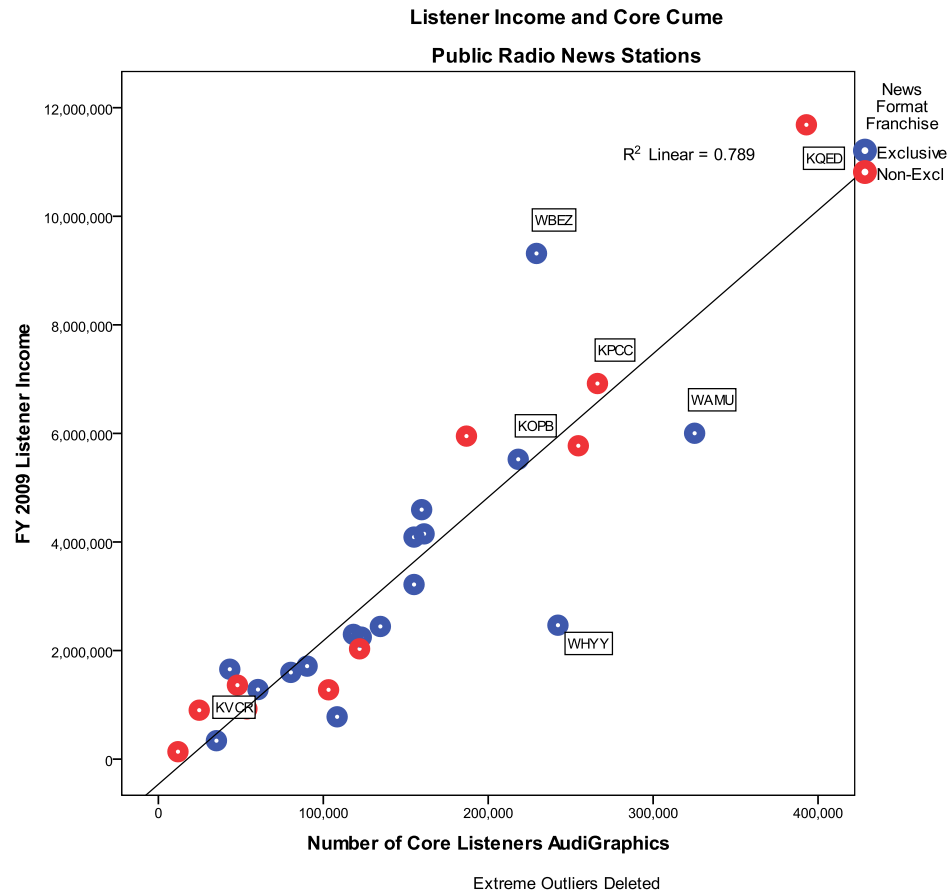
# LISTENER INCOME: Core Cume

The number of core listeners is an excellent predictor of annual income from listeners. It explains almost 80 percent of the differences among public radio news stations in the level of individual giving.

On this chart nearly all the stations fall very close to the “best fit” line.

Blue circle stations have an “exclusive” public radio news franchise in their markets. Red circle stations share the format. There is no material difference between them in the core-cume/giving relationship.

Using this information, the way to build listener income is to build the number of core listeners. In practical terms, that means extending the reach of the station while maintaining a high core composition.



X axis is number of weekly cume listeners who are Core

Y axis is annual income from listeners per CPB FY 2009

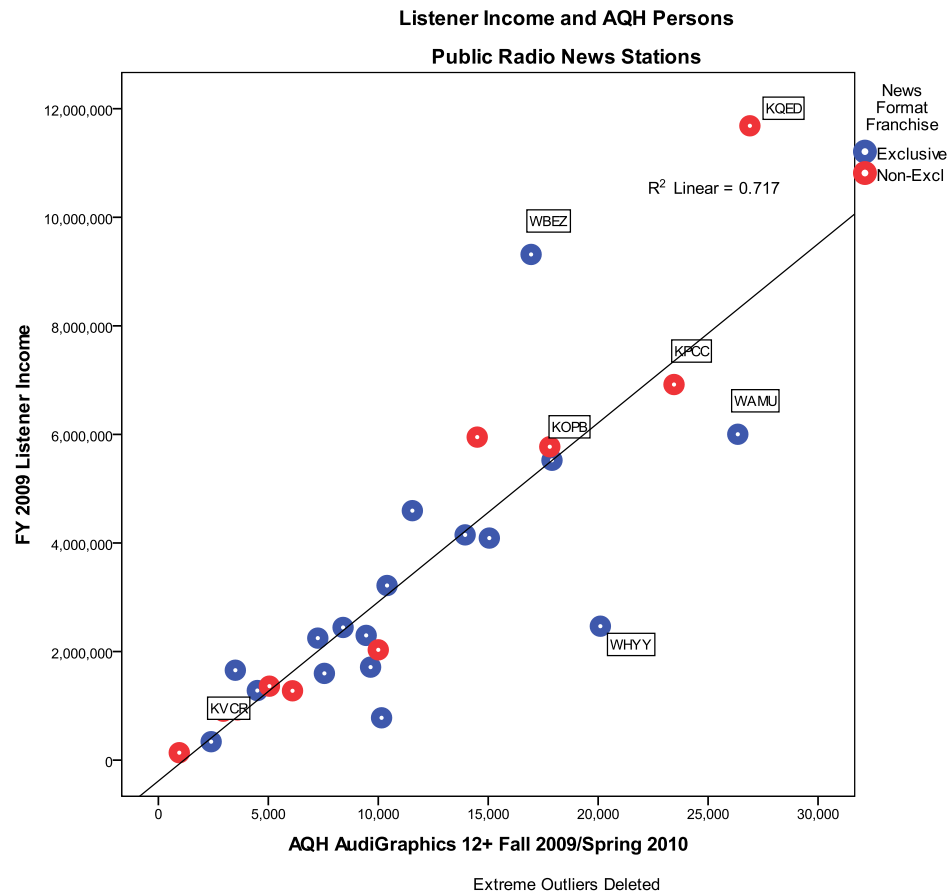
# LISTENER INCOME: Average Quarter Hour Audience

AQH audience can also predict the amount of listener income for public radio news stations – at 72%, almost as well as the number of core cume listeners.

Except for WBEZ, KQED and WHYY, most stations fall close to the line.

The predictive power of either core cume listeners or AQH listening makes sense in this context. Core listeners are the most loyal audience segment – on average they tune in more often and listen longer than other listeners. While they might be 50 percent of the weekly cume, they generate the majority of listening on an AQH basis.

For this analysis and the prior one we included total audience, beyond the metro, since the station pitches to all of its listeners.



X axis is the station's total Average Quarter Hour listening audience

Y axis is annual income from listeners per CPB FY 2009

## CORE LISTENERS: Key to News Stations' Public Service Model

Combining these findings about individual giving with our prior report on predicting the audience for news stations, we see the crucial role of core listeners in the broadcast business model for public radio news stations.

We found three variables that, together, account for 72 percent of the variance in audience shares for public radio news stations:

- Core Composition of Cume
- Market College Grad Composition
- News Format Franchise

Of the three, the one most under a station's control – and that is the most powerful of the three factors – is core composition.

This finding points news stations in the direction of programming that generates dedicated listening, a format that increases core composition.

As core **composition** contributes to a news station's share of listening in its market, the **number** of core listeners contributes to the amount of listener support. To restate our earlier point and knit together these two imperatives:

**Extend the reach of the station while maintaining a high core composition.**

In all these formulations we are using “core listener” with respect to the patterns of a person's radio use. A core listener is a person who listens to a given radio station more than to any other radio station. Some core listeners may be heavy listeners – to both the station to which they are core and to others. Other core listeners may be light listeners.

The lessons of this analysis align with the continuing themes of the GROW THE AUDIENCE initiative:

**wider use and deeper value.** By doing both, public radio news stations will achieve larger audiences and greater resources with which to serve them.

## METHODOLOGY

This analysis is based on public radio news stations that met the following criteria:

- Offered news/talk programming 75% or more of the time on weekdays 6am-7pm
- Broadcast *Morning Edition*
- Home to a PPM market as of Summer 2010
- At least a 0.5 PPM share in its home market

For total audience estimates such as core cume and AQH audience loyalty and core composition, we used AudiGraphics data for Fall 2009/Spring 2010.

For stations with in-market repeaters, we aggregated all listening data in the market.

Individual giving data are derived from stations' Annual Financial Reports to the Corporation for Public Broadcasting.

We classified each station with reference to competition from other public radio stations – whether the station had a market exclusive franchise for *Morning Edition* or for the defined public radio news format.

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## News Staff

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Broadcasting

“Claiming a significantly larger role in American journalism will require a much more robust news-gathering capacity – more ‘feet on the street’ with notebooks, recorders, and cameras and more editors and producers to shape their work.” – *Public Radio in the New Network Age*, January 2010

There is a shared aspiration at dozens of public radio organizations to grow their reporting capacity and lift their presence as a critical source of local news and information. At the same time, there is uncertainty as to whether such investments will lead to larger audiences, more community financial support, or both.

We decided to take a close look and found:

- **Public radio news stations with larger audiences and more listener support have larger local news teams.**
- **But the size of public radio stations’ newsrooms does not predict their audience performance or individual giving.**
- **Rather, stations with more resources are making mission-driven investments in local and regional community service.**

This report is part of a series examining the performance of public radio news stations. GROW THE AUDIENCE reports are at [www.srg.org/GTA](http://www.srg.org/GTA)

Tom Thomas & Terry Clifford  
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## INVESTING IN NEWS STAFF: Audience Share

### News Staff and Listening

As stations, funders, and policymakers have watched the decline in local journalism at newspapers and local TV, there is a sense that public radio has an opportunity and responsibility to take on a larger role in meeting community information needs.

But will such efforts to serve the community through investments in local news capacity boost audience performance?

We looked at whether there is a correlation between the size of stations' newsrooms and the extent to which their share of listening in their market is above or below the audience share predicted by our statistical model.

The answer is no – knowing the size of a station's newsroom staff does not add to our ability to predict audience share beyond our previously reported model.

That model is based on the percent of core listeners in a news station's audience, the education level of its market, and whether or not it has the exclusive local franchise for public radio news.

Because the percent of core listeners – those who listen to the news station more than any other station – is so important to audience share for news stations, we also examined whether the size of the newsroom correlates with core composition of the audience.

It does not.

## INVESTING IN NEWS STAFF: Individual Giving

### News Staff and Giving

Our analysis of individual giving to public radio news stations found that the typical station raises about \$22 annually per core listener. This includes membership or subscription income, friends groups, and individual major donors.

Do stations with more news staff raise more money from individuals than those with fewer journalists?

One might think that a larger news staff would increase the perceived value of local programming and thus the amount a person gives.

Indeed, there is a modest correlation between the size of news staff and dollars raised per core listener. We also found a very strong correlation between size of news staff and total listener income.

But correlation is not causation, and the explanation could go either way. It could be that larger news staffs help produce more listener income, but it could also be that more listener income makes it possible to hire more news staff.

Sure enough, when we control for the station's annual listener income, there is no relationship between size of news staff and dollars raised per core listener.

That is, the size of the audience predicts the listener income, which explains the size of the news staff.

### The Role of Development

We don't have data on the size or professionalism of development departments for news stations.

But we have seen a positive relationship between the size of a station's development operation

and its productivity in prior studies and projects, going back to SRG's *Brilliant on the Basics* in the mid-90s.

That could be the case here, too.

Our instincts suggest that the stations raising the most listener income have more productive development teams.

## INVESTING IN NEWS STAFF: Putting the Story Together

### We think the full story is this:

1. The relative audience performance of public radio news format stations is explained by the percent of core listeners in stations' audience, education levels in the market, and whether or not stations have the exclusive public radio news format franchise in the market.

The size of a station's news staff adds no predictive power to this model.

2. Public service leads to public support. The amount of money raised from listeners is pretty much explained by total audience measures, of which the total number of core cume listeners works best.

3. We observe that stations that deliver more public service – as indicated by higher audience shares

and greater audience reach – raise more money from their listeners and spend more money on news staff.

Because they can.

**Stations with larger news staffs are making mission-driven use of their revenue, investing in community service and a more significant role in community life.**

4. The stations with larger audience and larger amounts of listener revenue are further empowered to invest in their news staff because they are more productive in their development work.

5. There is no systematic evidence that hiring more news staff will increase a station's share of listening in its market or that it will lead to more listener support relative to the size of its audience.

6. We should not dismiss the possibility of building a future link between the size of local newsrooms and growth in either audience or individual giving.

We need to remember that all but a few of the news stations we examined are staffed within a relatively narrow band, one that is quite modest when compared with the newspapers that have long dominated local journalism.

It could be that we will not see a lift in listening or giving until a number of stations reach a significantly higher level of editorial staffing than seen today.

We need to be careful, though, not to confuse hopes and aspirations with the current reality.

## INVESTING IN NEWS STAFF: Going Forward

### Funding Local News

For now, the connections between major investments in local news staff and greater audience and financial success remain in the realm of speculation – something for piloting, experimentation, and demonstration projects followed by careful evaluation.

Stations that are building larger local news staffs should not expect quick dividends in audience shares or listener income. Instead, these investments will more likely need to be spurred and sustained for some time to come by major gifts and philanthropy.

We began our work armed with a 2010 census of public media’s local journalists conducted by Public Radio News Directors with support from the Corporation for Public Broadcasting. The census provided counts of full-time and part-time news staff for stations across the country.

We were able to “double check” the census data for most stations in this study with results from another 2010 survey of local news efforts conducted by SRG and DEI.

We matched the newsroom counts with audience and financial data for public radio news stations measured by Arbitron’s PPM system as of Summer 2010 – the same set of stations used for other analyses and reports in this series.

### Coming Soon

SRG, in partnership with DEI, will soon publish material on making the case for major donor and philanthropic support of public radio’s local journalism.

That report will be based on surveys of stations’ current efforts and aspirations and in-depth interviews with local and regional donors and national foundations

## METHODOLOGY

For this analysis we identified public radio news stations that met the following criteria:

- Offering 75% or more news/talk programming on weekdays 6am-7pm, including *Morning Edition*
- Home to a PPM market as of Summer 2010
- At least a 0.5 PPM share in its home market

We measured the Performance of each station in terms of audience variables related to public service. For metro estimates such as AQH share and cume rating, we used PPM data for July-December 2010.

For total audience estimates such as AQH persons and cume persons, as well as loyalty and core composition, we used AudiGraphics data for Fall 2009/Spring 2010.

We classified each station with reference to competition from other public radio stations – whether the station had a market exclusive franchise for Morning Edition or for the defined public radio news format.

CPB provided listener support figures for FY2009.

The count of local newsrooms was created by Public Radio News Directors (PRNDI).

We used SPSS to run partial correlations and linear regression. We found that the audience share for public radio news format stations could be predicted by the combination of three variables:

**Model Summary<sup>d</sup>**

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.633 <sup>a</sup>	.400	.382	1.2262
2	.838 <sup>b</sup>	.703	.684	.8764
3	.864 <sup>c</sup>	.746	.721	.8232

a. Predictors: (Constant), Core AudiGraphics 12+ Fall 2009/Spring 2010

b. Predictors: (Constant), Core AudiGraphics 12+ Fall 2009/Spring 2010, Metro College Grad 25plus Census 2009

c. Predictors: (Constant), Core AudiGraphics 12+ Fall 2009/Spring 2010, Metro College Grad 25plus Census 2009, NPR News Format Franchise

d. Dependent Variable: Share 6plus Summer-Fall 2010

Over 70 percent of the variance in station performance can be predicted by their core cume composition, the market's composition of college graduates and direct format competition from another public radio station.

The number of core listeners generated by each station predicts 80 percent of the variation in annual listener support. Alternatively, the total AQH audience can be used to predict 72 percent of the variance in annual giving.