



Walrus Research

The Aging Audience

Spring 2009

Reality has a way of eventually getting your attention

GENERATIONAL COHORTS

Garrison Keillor, who does his show in front of a live audience, has observed that each year he sees more balding grey heads out there.

Yet if Terry Gross, Robert Siegel, Scott Simon or Tom and Ray Magliozzi could have seen their listeners over the years, they would have observed the same process. The public radio audience continues to age.

Demographers use the term cohort to mean a set of people who were born at the same time and go through formative experiences together. In a pure cohort phenomenon, such as a high school class reunion, the median age increases one year each year. The number of attendees can only decrease.

The most famous generational cohort is the Baby Boomers, born 1946 – 1964, who came of age during the years of Vietnam, hippies and underground FM radio. The audience for National Public Radio has long been dominated by highly educated Boomers.

On January 1, 2010, the oldest Boomer will turn 64 years old.

Listeners are highly concentrated among the Baby Boomer population, and are much more educated than the average U.S. citizen, with 69% having a college degree.

These factors in turn drive a level of household income that is also well above the national average.

**NPR Audience Handbook
October 2009**

DESIGN

Research Questions

- At what rate is the public radio audience aging?
- Does aging differ among public radio formats?
- How do the dynamics of listening vary by format?
- What are the implications for future growth of listening and giving?

Method in Brief

We used AudiGraphics to analyze the audience of public radio stations in the top 50 markets, which generate 75 percent of the listening to public radio.

We identified 51 stations that broadcast consistent formats – NPR news, classical music or jazz. These are essentially the same stations that we analyzed for last year's *Grow The Audience* studies, except that we did not include commercial classical stations.

AudiGraphics

To answer the research questions, we used AudiGraphics.

AudiGraphics is a powerful system from Audience Research Analysis based on audience data from Arbitron.

www.ARAnet.com

AGING BY FORMAT

We chose a ten year period – Spring 1999 to Spring 2009 – to calculate the rate of aging for each format.

Stations that have dedicated their format to NPR news attract an audience with median age 52. That is almost exactly in the center of the Baby Boom generational cohort.

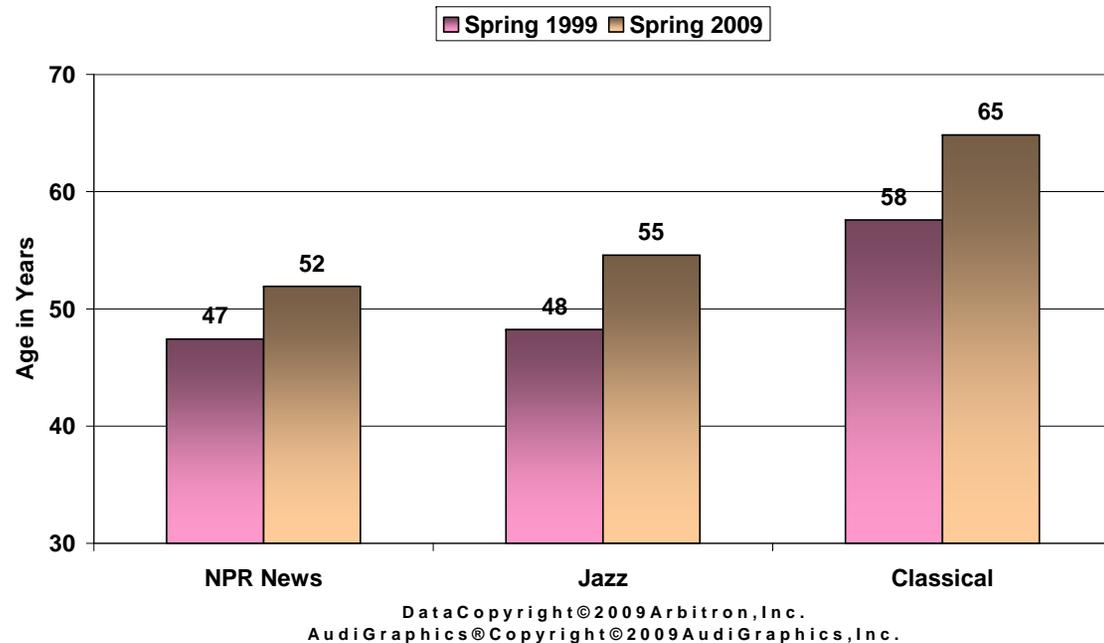
Ten years ago the same set of NPR stations had a median age of 47, so their rate of aging is 5 years over the last 10 years.

The jazz stations are aging at a faster rate. With median age of 55, the rate was 7 years of aging per 10 years.

The oldest format is classical music, which has aged 7 years over the last 10 years. The median age is 65.

That means half of the classical audience are not Boomers, rather they are Seniors on Medicare.

Median Age By Format
Major Market Public Radio Stations



This chart shows a ten year period, 1999 – 2009.

Median age is the midpoint of the average quarter hour listening audience, Monday-Sunday 6am-12m.

For the list of stations and markets, please see page 13.

LIFE STAGE NPR NEWS

Program directors are charged with knowing their audience – how they live and how their needs might be fulfilled by public radio. This chart shows how the audience for NPR news stations has been moving into the next stage of life.

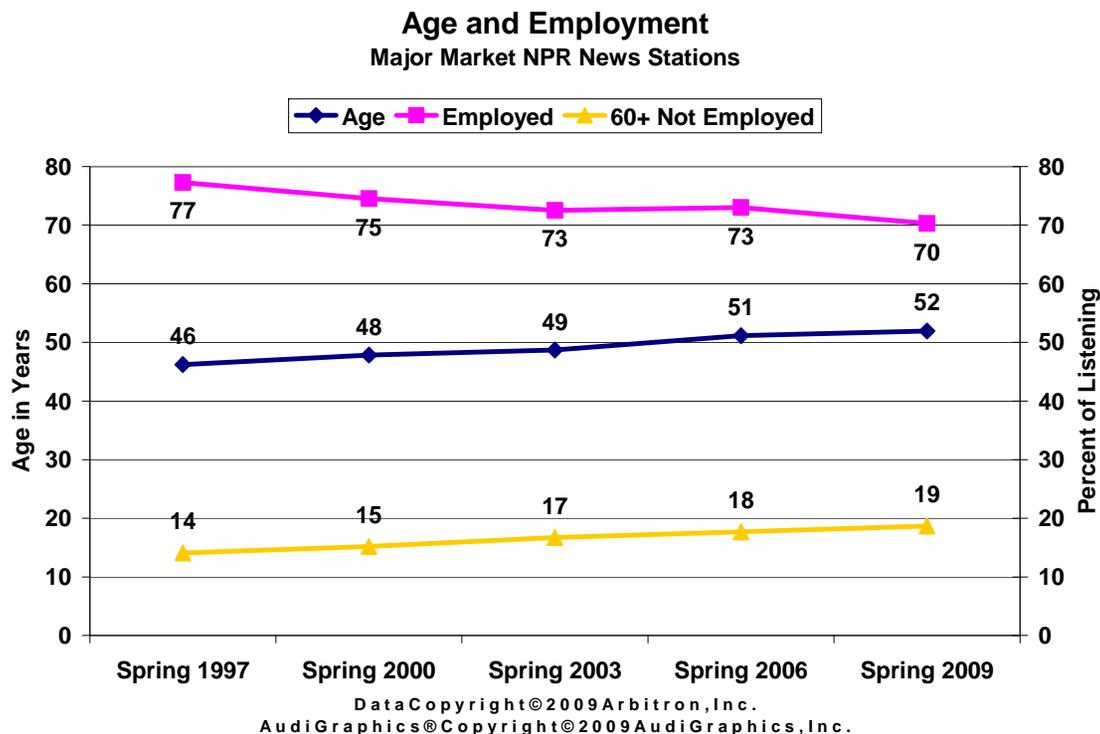
The blue line, graphed on the left axis, plots median age every three years from Spring 1997 to 2009.

The other lines, graphed on the right axis, show employment trends.

As the median age for NPR news stations went up from 46 to 52 years, their employed audience declined from 77 to 70 percent.

As of Spring 2009, 19 percent of the audience for NPR news stations was generated by persons who were 60 plus years old and not employed.

For NPR news station listeners, retirement is top of mind.



Read age on the left axis. Read the employment variables on the right.

Employed means the composition of the average listening audience, either full-time or part-time employment.

60+ Not Employed means persons who meet both criteria – at least 60 years old, without any employment.

LIFE STAGE JAZZ

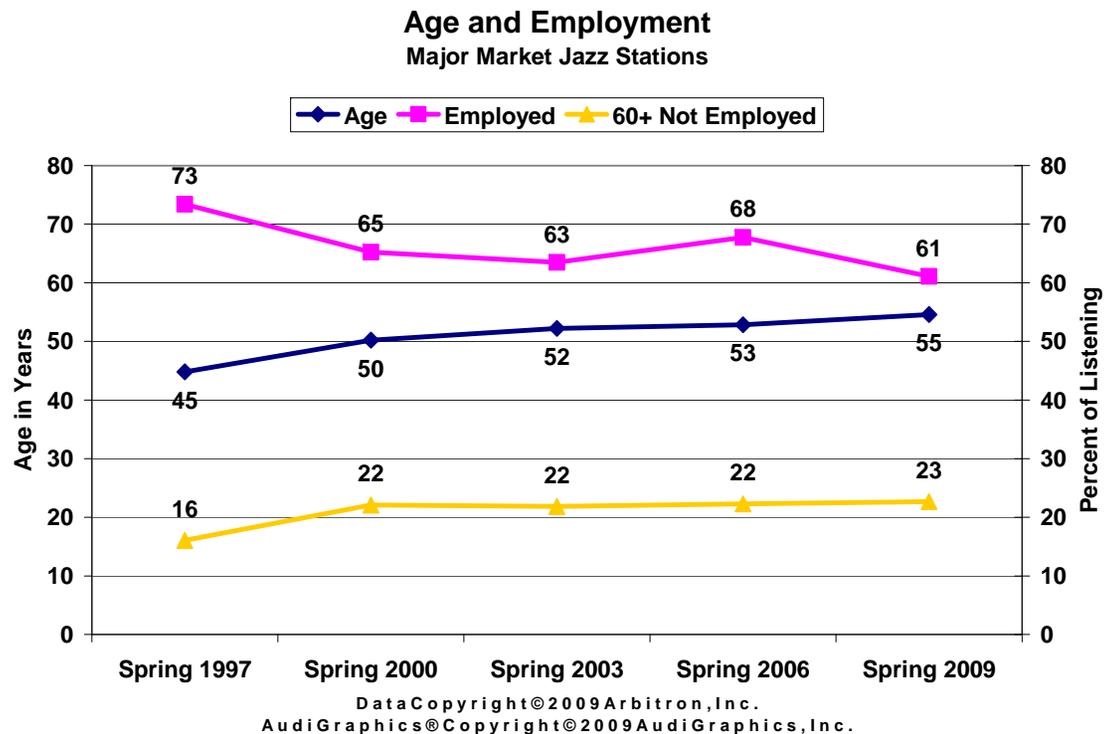
This chart shows the life stage trends for major market jazz stations.

On the left axis, from Spring 1997 to 2009, the median age of the jazz audience increased 10 years from 45 to 55 years.

On the right axis, full or part time employment dropped from 73 percent to 61 percent in 2009.

23 percent of the jazz audience is generated by persons who are 60 years or older and not employed.

With a somewhat older audience than the NPR news stations, the jazz stations are further down the road towards retirement.



Read age on the left axis. Read the employment variables on the right

Employed means the composition of the average listening audience, either full-time or part-time employment.

60+ Not Employed means persons who meet both criteria – at least 60 years old, without any employment.

LIFE STAGE CLASSICAL

The life stage chart for classical music stations shows that 2009 was the year they tipped into Seniority.

From a median age of 56 in Spring 1997, the classical audience aged to 65 years in Spring 2009.

That caused the employment lines on the chart to cross.

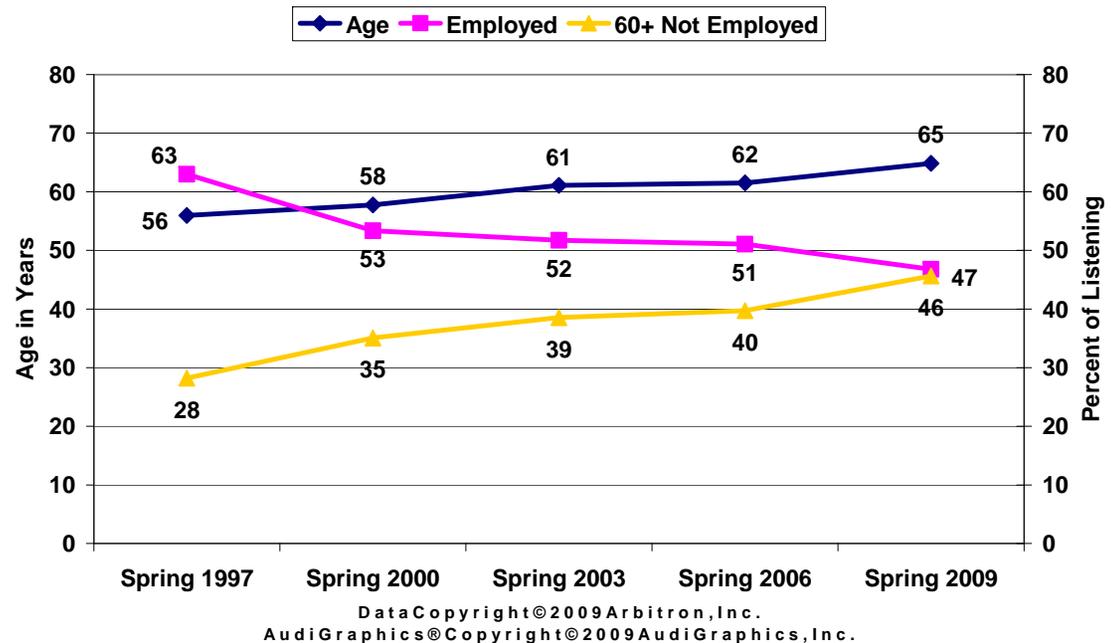
Although 63 percent of the classical audience was employed in 1997, by 2009 employment was 47 percent.

In fact, 46 percent of the classical audience is now generated by persons who are not employed and at least 60 years old.

Age and life stage explain why the classical audience is mostly listening at home, rather than away.

The end of employment may have an impact on their willingness to contribute money to the station.

Age and Employment
Major Market Classical Stations



Read age on the left axis. Read the employment variables on the right

Employed means the composition of the average listening audience, either full-time or part-time employment.

60+ Not Employed means persons who meet both criteria – at least 60 years old, without any employment.

DYNAMICS NPR NEWS

So far we have been talking about the NPR news stations as if they had programmed a consistent format during the period of this analysis.

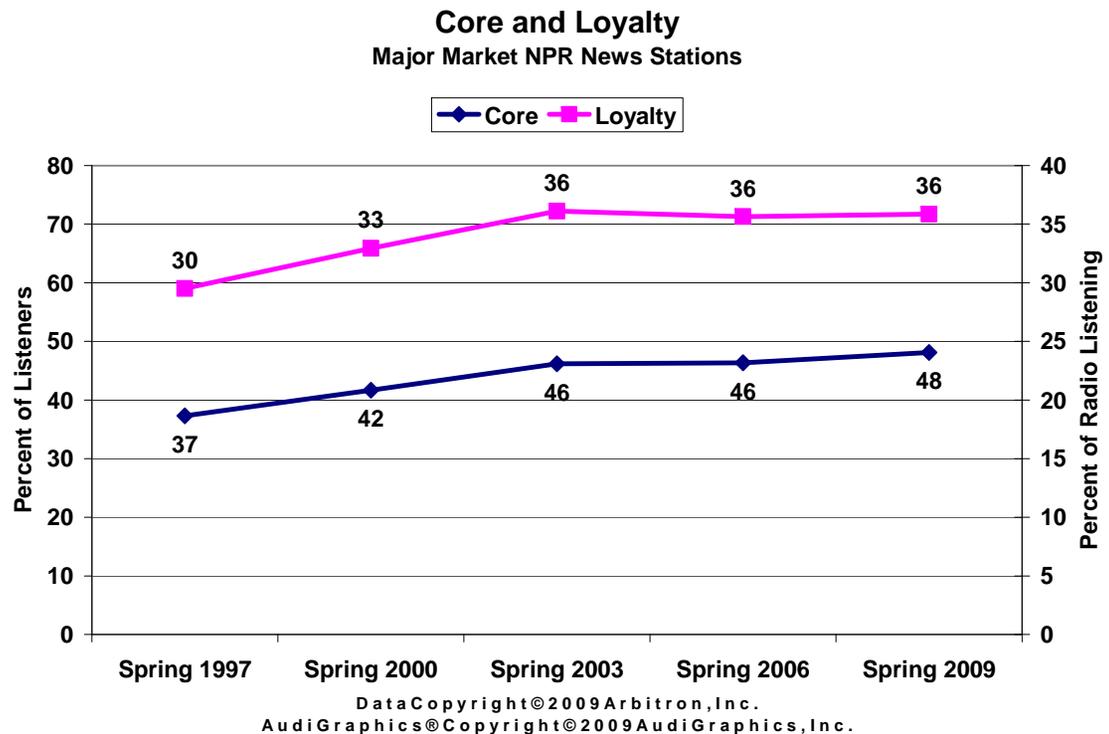
In fact, the stations that are now dedicated to the NPR news format evolved in that direction by adding more and more NPR (and PRI) programming from 1997 to 2003.

This chart shows how the NPR news stations thus became stronger in terms of audience dynamics.

Graphed on the left axis, the core composition of NPR news stations rose from 37 percent in 1997 to 46 percent in Spring 2003.

Graphed on the right axis, the loyalty to NPR news stations increased from 30 to 36 percent.

Since 2003, these stations have maintained their strong levels of loyalty and core composition.



A core listener (left axis) uses the NPR news station as first preference, listening to that station more than any other station.

Loyalty (right axis) is listening to the NPR news station as a percentage of all radio listening by the station's listeners.

As loyalty and core increase, so does listener support.

DYNAMICS JAZZ

Public radio's jazz stations have been less successful at raising money from listeners. This is explained in large part by the audience dynamics.

On the left axis, back in Spring 1997, only 21 percent of jazz listeners were core. That means 79 percent used another station as their first choice.

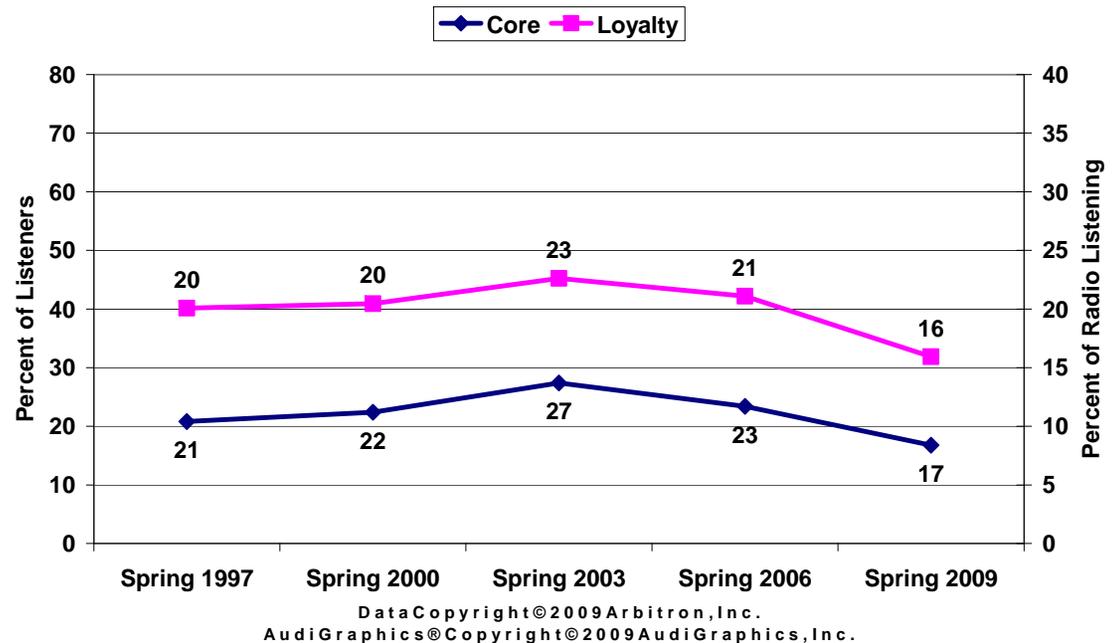
Up to 2006, the core trend was flat.

Loyalty, on the right axis, started at 20 percent in 1997 and the trend was flat to 21 percent in 2006.

In 2009 there was a crash in loyalty and core for the jazz stations. That may be related to Arbitron's PPM, although we did not see a similar crash for NPR news or classical.

There has been minimal growth in the size of the jazz audience. The dynamics of jazz have remained weak as the audience has aged.

Core and Loyalty
Major Market Jazz Stations



A core listener (left axis) uses the jazz station as first preference, listening to that station more than any other station.

Loyalty (right axis) is listening to the jazz station as a percentage of all radio listening by the station's listeners.

As loyalty and core increase, so does listener support.

DYNAMICS CLASSICAL

From 1997 to 2009, there was no change in the audience dynamics of classical music stations.

Core composition, on the left axis, was 37 percent in Spring 1997 and 36 percent in Spring 2009.

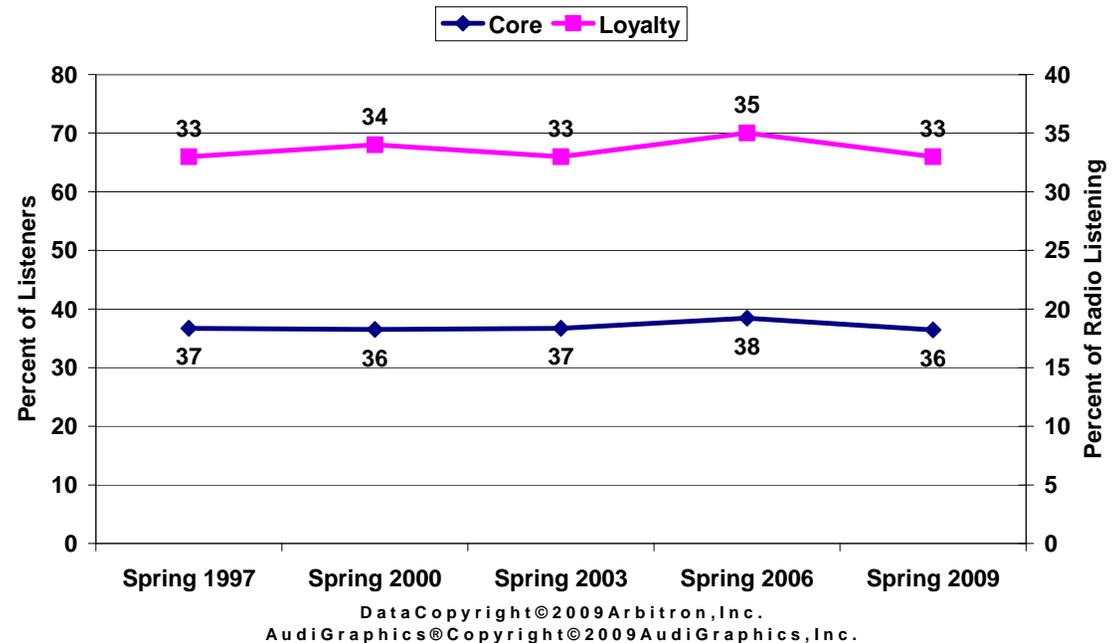
Loyalty, on the right axis, did not change from the 33 percent in 1997.

Compared to NPR news stations, the classical audience is significantly less likely to be core. However the loyalty to classical can be within range of an NPR news station.

From 1997 to 2009, the classical audience aged from 56 to 65, and a significant segment moved into retirement. There was minimal growth in the size of audience.

Nothing changed in the two critical dynamics of classical listening – core and loyalty. So we have a strong cohort effect operating in classical.

Core and Loyalty
Major Market Classical Stations



A core listener (left axis) uses the classical station as first preference, listening to that station more than any other station.

Loyalty (right axis) is listening to the classical station as a percentage of all radio listening by the station's listeners.

As loyalty and core increase, so does listener support.

IMPLICATIONS

Our research for *Audience 2010* focused the system's attention on the size of the public radio audience. The national listening audience, which had enjoyed linear growth for decades, lost its forward momentum in 2003.

In response, CPB funded *Grow The Audience*, a series of research reports and goal-setting documents.

In Fall 2008 NPR news benefited from interest in the Obama campaign, but tracking the size of the audience going forward has been complicated by Arbitron's changeover from the diary to PPM.

What about this study, which tracks variables across the divide from diary days to the new reality of PPM?

In a presentation at the 2009 PRPD conference, the RRC emphasized that despite the impact on AQH and cume, PPM has not changed the qualities of the public radio audience. PPM, just like the diary, finds listeners to be highly educated, affluent and beyond middle age.

Education is the most powerful predictor of listening to public radio, but the continued aging of the public radio audience shows the influence of generational cohorts.

Cohort effects are generally strong with reference to musical tastes. For example, the audience for big band music is dying off with the World War II generation.

Here's what we can say about classical music, the oldest public radio format:

The classical audience has aged 7 years over 10 years, approaching the rate of a pure cohort.

The audience dynamics of core and loyalty have not significantly improved or weakened.

There has been no growth in the size of the classical audience, except as public radio has been able to purchase failing commercial classical stations.

Accordingly, no one should be surprised as the median age for classical music stations will soon approach 70.

IMPLICATIONS

The NPR news stations are also aging but at a slower rate than classical or jazz stations – half a year older each year.

No doubt there is some impact from a cohort effect, as educated Boomers have stuck with NPR news over the years. But unlike the classical or jazz stations, the NPR news stations have brought in more listeners.

In fact, the NPR news stations that we analyzed in this study nearly doubled their audience from 1997 to 2009.

Some of that growth was due to younger generations of college graduates joining the NPR Boomers. See *Audience 2010* especially *Report #5 Historic Sources of Growth*.

Yet the real strength of the NPR news format is how the in depth information becomes important in the lives of its listeners. Recall the audience dynamics:

Nearly half of the NPR news listeners are core!

Within the weekly cume we typically find that loyalty and core composition are strongest within Boomer demos.

Accordingly, educated Boomers are likely to dominate the NPR news audience – and more so the contributors – as they age into their retirement years.

This limited study is not intended to be definitive. Rather it fits into a substantial tradition of research going back to *Audience 98* and *The Public Radio Tracking Study*.

Audience 98 is available at the Audience Research Analysis site www.ARA.net.

The *Tracking Study* and other research studies mentioned in this report are available at www.WalrusResearch.com.

Walrus Research is an independent audience research firm with an established record of quantitative and qualitative projects for public radio stations, national producers and networks.

Non-proprietary publications from major research projects such as *Grow The Audience*, *Audience 2010*, NPR's *Local News Initiative* and the PRPD *Core Values* studies are available for download at www.WalrusResearch.com.

STATIONS AND MARKETS

We used AudiGraphics to analyze the audience of 51 public radio stations that broadcast focused formats as of Spring 2009. They are essentially the same stations we studied for *Grow The Audience*.

To qualify a station had to air the format during the critical morning, midday and afternoon dayparts.

We did not include AM stations.

The classical and jazz stations we selected have been in that format throughout the period studied.

The NPR news stations evolved into their format over the years. That is, stations like WUNC which were dual format news and classical back in 1997, kept adding more hours of NPR (and PRI) news programming.

By the years 2001 to 2003 nearly all of the NPR news stations had fully committed to the format.

NPR News Format

KCUR-FM	Kansas City
KERA-FM	Dallas
KJZZ-FM	Phoenix
KNOW-FM	Minneapolis
KNPR-FM	Las Vegas
KOPB-FM	Portland
KPBS-FM	San Diego
KPCC-FM	Los Angeles
KQED-FM	San Francisco
KSTX-FM	San Antonio
KUER-FM	Salt Lake
KUOW-FM	Seattle
KWMU-FM	St Louis
KXJZ-FM	Sacramento
WAMU-FM	Washington
WBEZ-FM	Chicago
WBUR-FM	Boston
WCPN-FM	Cleveland
WFAE-FM	Charlotte
WFDD-FM	Greensboro
WFYI-FM	Indianapolis
WHRV-FM	Norfolk
WLRN-FM	Miami
WNPR-FM	Hartford
WNYC-FM	New York
WUNC-FM	Raleigh
WUOM-FM	Detroit
WUWM-FM	Milwaukee
WVXU-FM	Cincinnati
WYPR-FM	Baltimore

Classical Format

KBAQ-FM	Phoenix
KBYU-FM	Salt Lake
KPAC-FM	San Antonio
KSJN-FM	Minneapolis
KUSC-FM	Los Angeles
KXPR-FM	Sacramento
WBJC-FM	Baltimore
WDAV-FM	Charlotte
WGUC-FM	Cincinnati
WHRO-FM	Norfolk
WNED-FM	Buffalo
WQED-FM	Pittsburgh
WUOL-FM	Louisville
WXXI-FM	Rochester

Jazz Format

KCSM-FM	San Francisco
KKJZ-FM	Los Angeles
KTSU-FM	Houston
WBGO-FM	New York
WCLK-FM	Atlanta
WDCB-FM	Chicago
WDNA-FM	Miami