

Walrus Research

Heavy Givers

The Public Radio Tracking Study

Special Report

Summer 2003

Reality has a way of eventually getting your attention

Heavy Givers

The Public Radio Tracking Study

Introduction

This is the second in a series of Special Reports from the Public Radio Tracking Study. Each report will focus on a single component of the critical relationship between public service and public support.

Following in the tradition of *Audience 98*, the Public Radio Tracking Study is the largest recontact study ever conducted for public radio. From Winter 1999 through Fall 2001, we recontacted over 30,000 public radio listeners who had kept Arbitron diaries so we could determine their attitudes and behavior with reference to listener support.

In this report we show the characteristics of Heavy Givers, and explain how they differ from givers who contribute at lower levels.

Credits

The Public Radio Tracking Study was funded by 21 leading public radio stations, along with a first year challenge grant from the Corporation for Public Broadcasting. The funding stations were:

KCFR-FM	KUT -FM	WKSU-FM
KJZZ-FM	WAMU-FM	WNYC-AM
KOPB-FM	WBEZ-FM	WNYC-FM
KPLU-FM	WBUR-FM	WPKT-FM
KQED-FM	WCPN-FM	WUNC-FM
KUHF-FM	WETA-FM	WUSF-FM
KUSC-FM	WGUC-FM	WXPB-FM

The Corporation for Public Broadcasting provided additional funding for a series of Special Reports from the Public Radio Tracking Study. Accordingly, this report is freely available for any publication. Download electronic copies of this and other national research studies from WalrusResearch.Com.

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Executive Summary

In the tradition of *Audience 98*, we analyzed the behavior and attitudes of givers who contribute money to public radio. The Public Radio Tracking Study is the largest ever recontact study of public radio listeners.

- Heavy Givers—those who give at higher levels—are worthy of special attention. We found that only 16 percent of givers contribute nearly half of the listener support.
- We confirmed that reliance upon public radio not only predicts which listeners become givers but also explains their level of giving. Givers with greater reliance upon public radio will give more money.
- By reliance upon public radio we mean behavior. Measures of listening like loyalty, time spent listening, core vs. fringe and tune in occasions are predictors of which givers will give at different levels of giving.
- Personal importance is an internal realization that public radio has become valuable in a giver's life. As personal importance increases, the level of giving by that giver will increase.
- Very strong belief that public radio depends on listener support also helps to predict which givers will contribute at higher levels.
- We also found that givers with the highest education are likely to give at the highest level. That is a reflection of their values and the appeal of public radio programming.

We conclude that while premiums or challenges may stimulate some givers to upgrade their pledge, the fundamental cause of heavy giving is the public service generated by public radio programming.

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The Tracking Study and Audience 98

The Public Radio Tracking Study follows directly from *Audience 98*, which itself descended from *Audience 88*. David Giovannoni originally designed the recontact methodology, linking respondent-level Arbitron diary data with follow-up telephone or mail questionnaires about giving to public radio.

The essential findings of *Audience 98* distilled into two ideas:

Public service begets public support.
Public support focuses public service.

Audience 98 was based on Arbitron data collected in Fall 1996. After its publication, managers of leading public radio stations gathered in a series of seminars and agreed that the research should be carried forward.

We designed the Public Radio Tracking Study to trend critical measures across quarterly samples of public radio listeners from Winter 1999 through Fall 2001.

This Special Report from the Public Radio Tracking Study is based on 17,591 completed interviews with public radio listeners who kept Arbitron diaries from Winter 1999 through Fall 2001. The sample size for this report is double the 8,000 respondents reinterviewed for *Audience 98*, but our respondents represent leading major market stations, not a projectable national sample.

In this report, using data collected five years after *Audience 98*, we address the critical question: “What are the characteristics of Heavy Givers?”

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Levels of Giving

To determine how much money each respondent gave to a public radio station, we asked this question:

“Thinking back over the last 12 months, how much money in total did your household give to support [STATION]?”

Please notice two points:

We asked for a total over 12 months. \$50 in the spring, plus another \$50 in the fall, would be \$100 given. In this report, when we refer to level of giving, it is the amount given over a year—not simply one pledge event.

We asked about household giving. Public stations usually receive one gift from a household, not knowing the number of givers within that household.

Yet our objective was to analyze the behavior of individual givers.

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Amount per Giver

A particular strength of the recontact method is that before we interviewed any respondent we already had all of the Arbitron diaries from that household. We knew how many radio listeners lived in that household, what stations they used and for how many quarter hours.

With the powerful recontact method, we were able to allocate the household's gift among those residents who listened to public radio.

Consider a household with two public radio listeners:

One listens to the station for 10 quarter hours, the other for 20 quarter hours per week. If a station receives \$60 from the household, that would be the size of gift in station records. But in the Tracking Study we allocated \$20 to the first listener and \$40 to the second listener, based on their use of the station.

Accordingly, the levels of giving we show in this report might seem a bit low compared to other numbers circulated around the public radio system. That is because we were able to calculate the amount given per individual giver in each household.

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Light, Moderate and Heavy Givers

For this report, we defined three segments of givers based on the amount given per individual over 12 months.

Light Givers gave \$49 or less.

Moderate Givers gave \$50 to \$100.

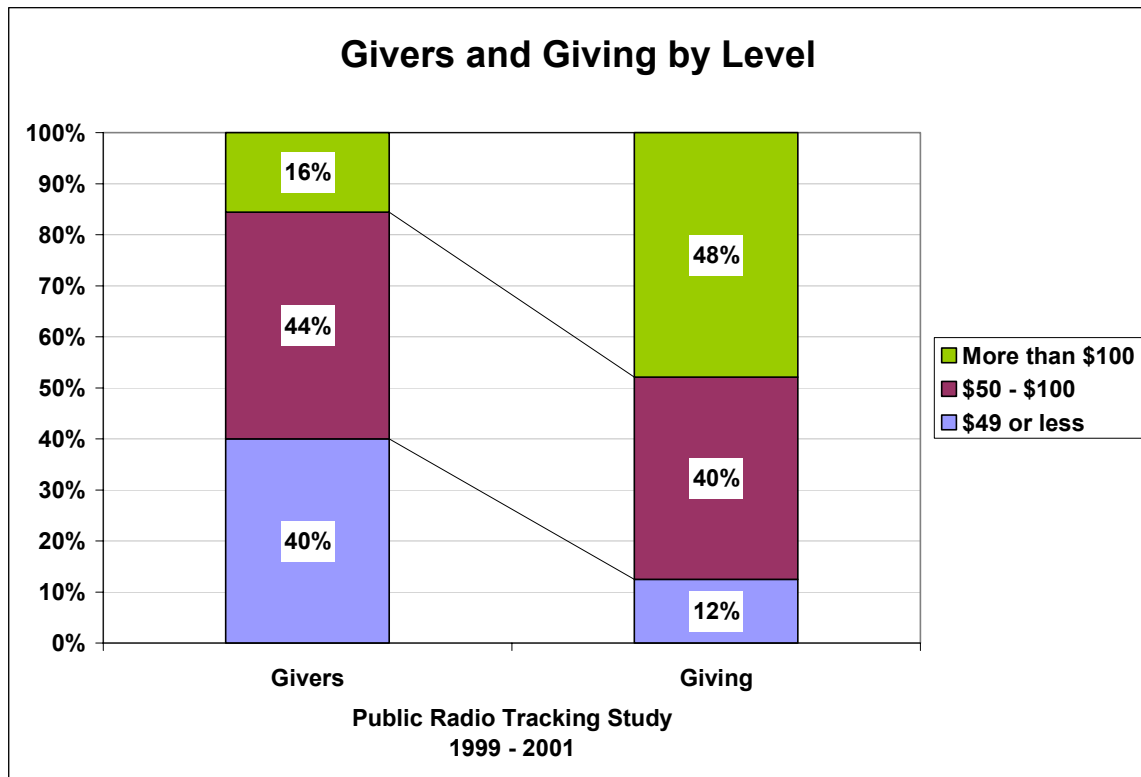
Heavy Givers gave more than \$100.

The highest annual gift in our sample was \$2000, which might be a reasonable cut-off between Heavy Givers and major donors.

The following chart shows why Heavy Givers are important.

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The green segment shows Heavy Givers. While they constitute only 16 percent of givers, they contribute 48 percent—nearly half of the money.

The red segment shows Moderate Givers. They are 44 percent of givers. Their contribution is closely proportional, 40 percent of the money.

The blue segment shows Light Givers. They are 40 percent of givers, but they contribute only 12 percent of the money.

Heavy Givers contribute nearly half of the money. It's critical that we determine the characteristics that separate Heavy Givers from Light and Moderate Givers.

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Beware of the Average

After the fund drive, it's customary to calculate the average pledge. Managers like to track that statistic. When the average pledge rises, that is considered to be good.

But the average can be a misleading statistic, especially when the variable is not distributed normally. In statistical terms, the average or mean is highly sensitive to outlying scores in a skewed distribution.

Consider a public radio station whose spring drive generates 10 pledges:

\$25 \$25 \$25 \$50 \$50 \$50 \$50 \$75 \$75 \$75

The spring average is \$50.

Six months later the same station broadcasts a fall drive and gets 10 pledges:

\$25 \$25 \$25 \$50 \$50 \$50 \$50 \$75 \$75 \$1000

The fall average is \$142.50.

The manager is thrilled because the average pledge increased from \$50 to \$142.50. But on closer inspection you can see that only a single giver upgraded from \$75 to \$1000.

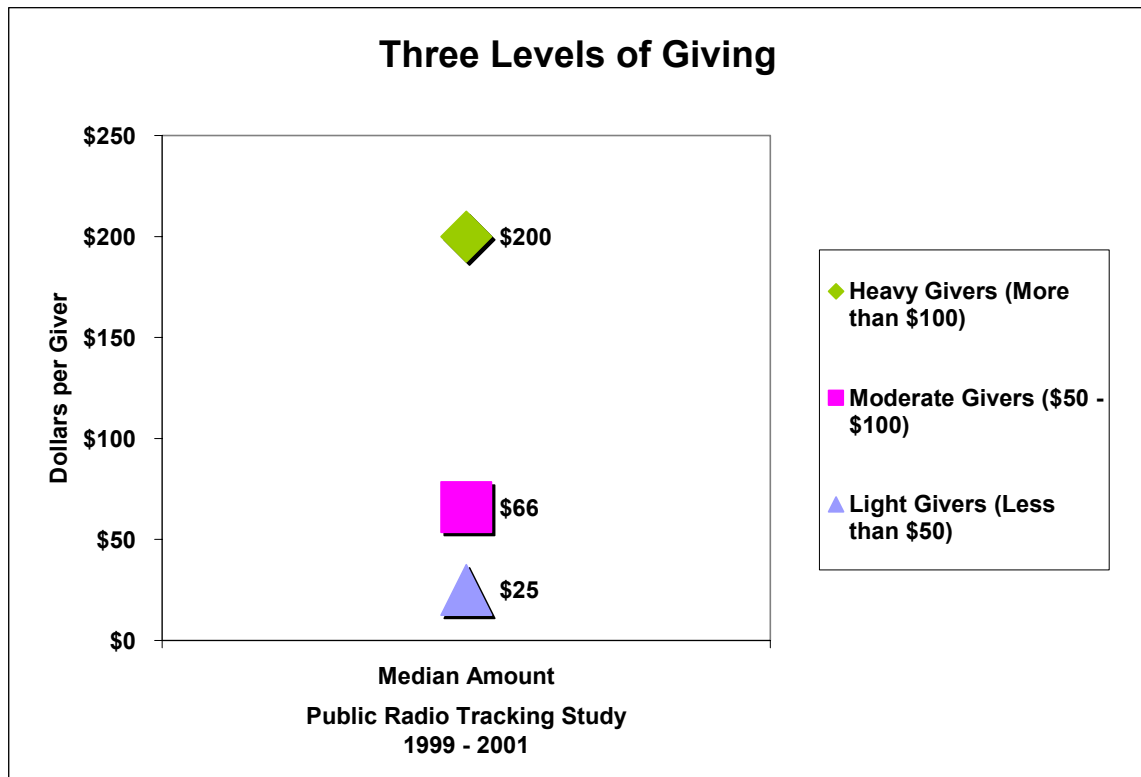
It was okay to use the average in the spring because in that drive the pledges were normally distributed. But the average was misleading in the fall because in that drive the distribution was skewed by an outlying score of \$1000.

In fact, 9 out of the 10 fall pledges were below the average, because of that one Heavy Giver.

The median amount was \$50, the same in both spring and fall.

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This chart shows three segments of givers by levels of giving.

The green diamond shows the median annual gift by Heavy Givers. Among those who gave more than \$100, the typical amount was \$200.

The red square shows the median annual gift by Moderate Givers. Their typical amount was \$66.

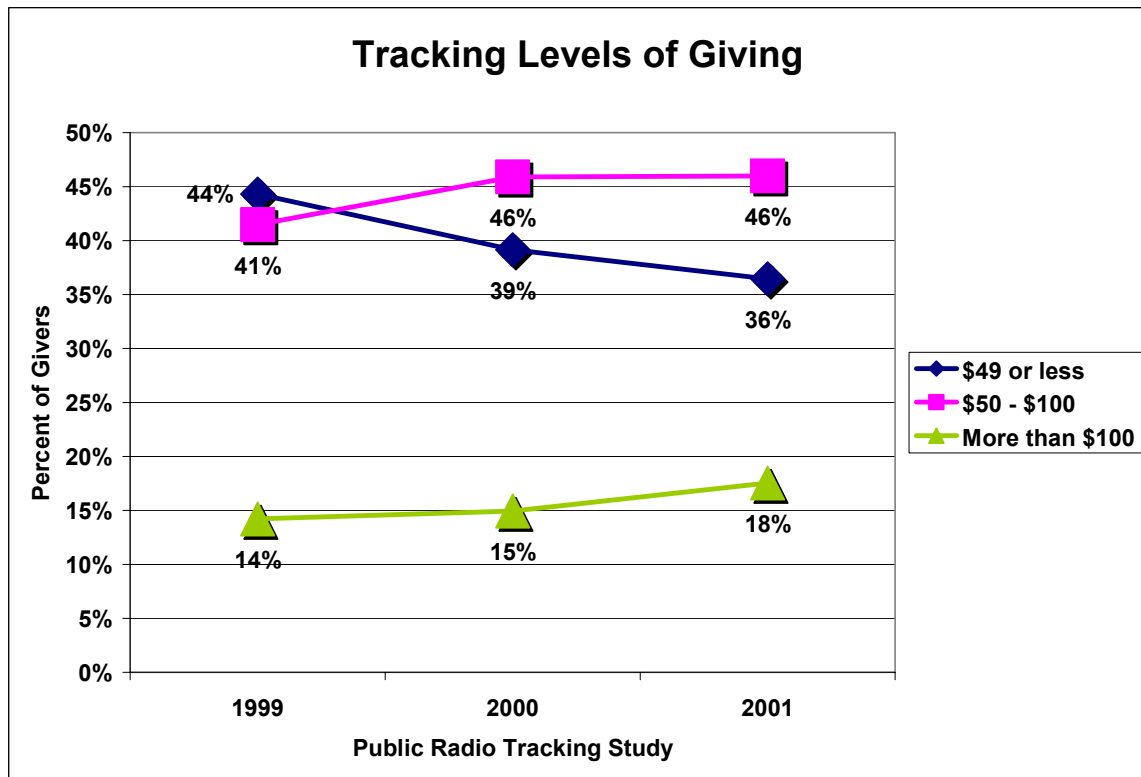
The blue triangle shows the median annual gift by Light Givers, typically \$25.

Notice that there is a bigger gap between the Heavy Givers and the Moderate Givers, than between the Moderate and Light Givers.

This gets especially interesting when we track the levels of giving over time.

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The Public Radio Tracking Study was designed to be longitudinal. We went back into the field each quarter for three years. We interviewed 12 waves of public radio listeners from Winter 1999 through Fall 2001.

Among our stations, we found that the giving segments were changing.

Heavy Givers increased from 14 percent of givers in 1999 to 18 percent of givers in 2001.

Light Givers decreased from 44 percent in 1999 to 36 percent in 2001.

That's great news, but we need to understand why and how that happened in our sample of leading major market stations.

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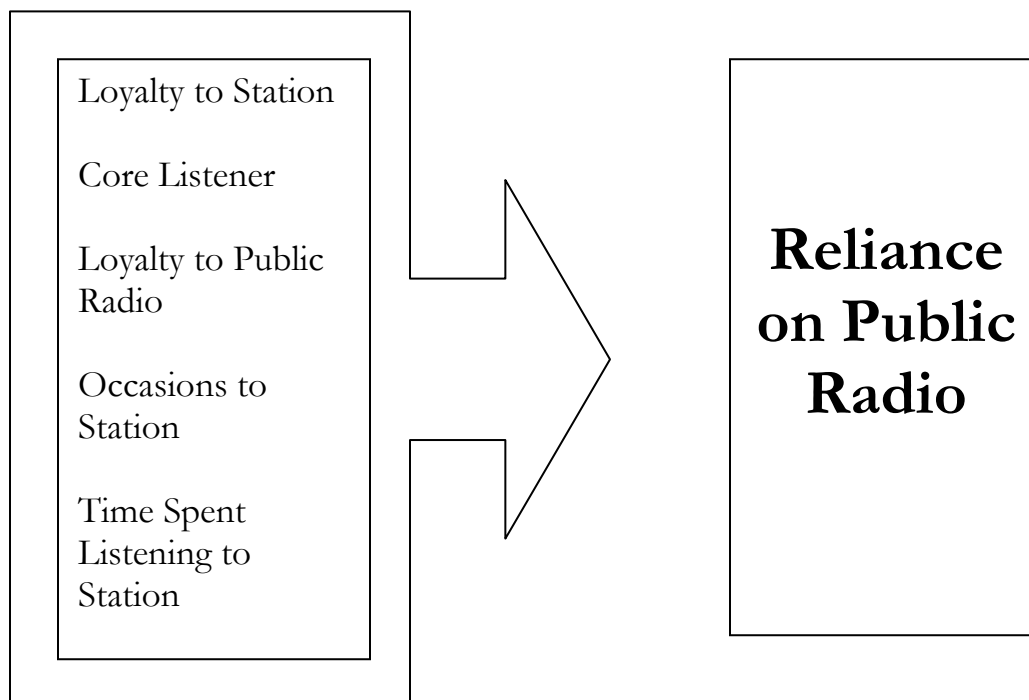
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Reliance upon Public Radio

Programming causes audience, and listeners are potential givers. Program directors set the potential for development.

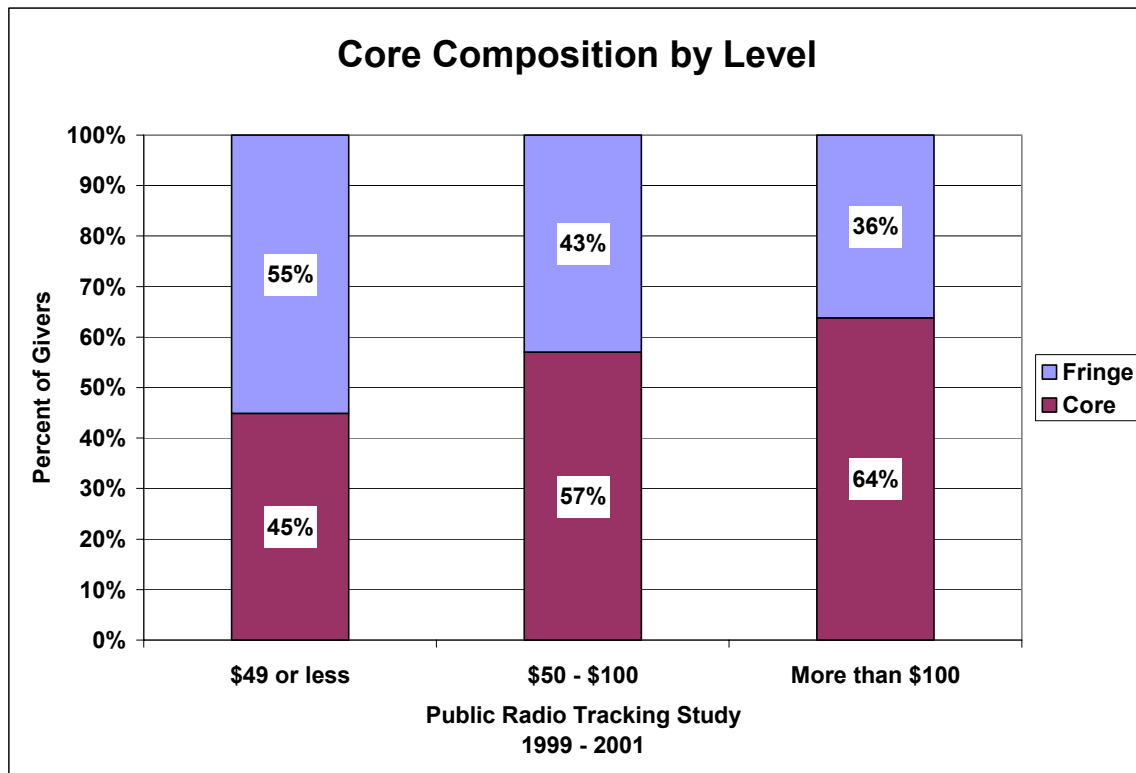
Our previous report (available at WalrusResearch.Com) confirmed that reliance upon public radio is the primary predictor of which listeners will become givers. In this report we demonstrate that listening behavior also predicts the level of giving—which givers become Heavy Givers.

The diagram below shows the five individual measures of listening that come together into a factor—reliance on public radio. In a series of charts, we will show how each measure relates to levels of giving.



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A core listener is one who uses a public radio station more than any other station. A fringe listener does use that public station but listens more to a competing station.

The chart shows the core vs. fringe composition of each segment of givers.

45 percent of Light Givers are core to the station.

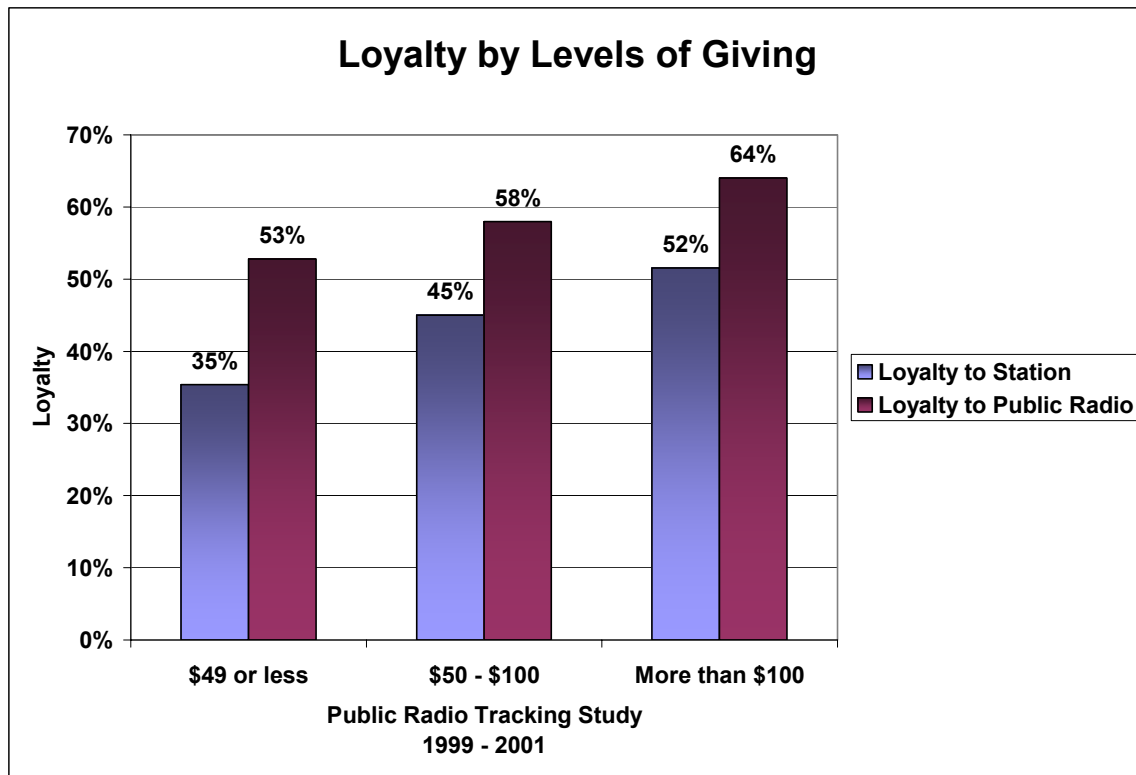
57 percent of Moderate Givers are core.

64 percent of Heavy Givers are core.

In this chart we are looking at givers only. It's clear that givers who are core to the station are more likely to become Heavy Givers. Program directors set the potential number of Heavy Givers by building core composition.

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This chart shows loyalty by levels of giving. Loyalty is the amount of listening to a station, expressed as a percentage of total radio listening.

The blue bar is loyalty to the public station that received the gift. The red bar is a giver's loyalty across two or more public stations, as a percentage of total radio listening.

Heavy Givers are 52 percent loyal to their station and 64 percent loyal to public radio.

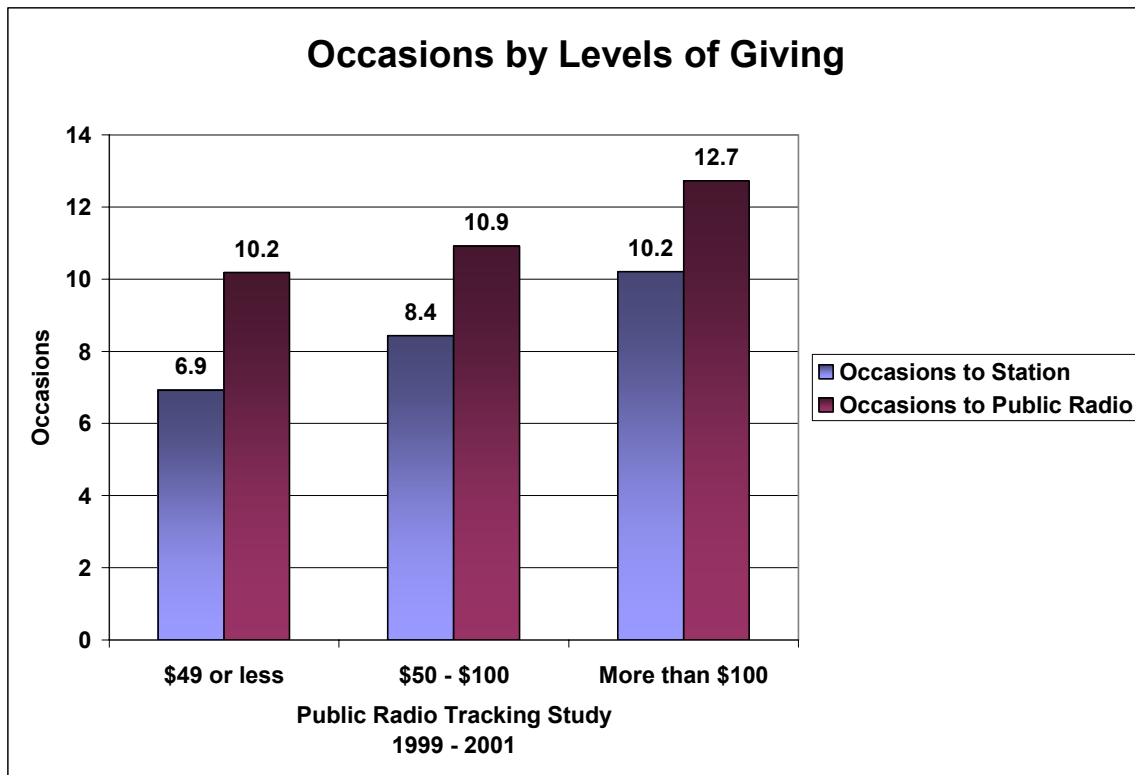
Moderate Givers are 45 percent loyal to their station.

Light Givers are only 35 percent loyal.

It's clear that level of giving is a function of loyalty. As the program director improves the format and builds loyalty, the potential number of Heavy Givers will increase.

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Here's another measure of listening. By occasion we mean a single tuning event, switching over to public radio or turning on the public radio station.

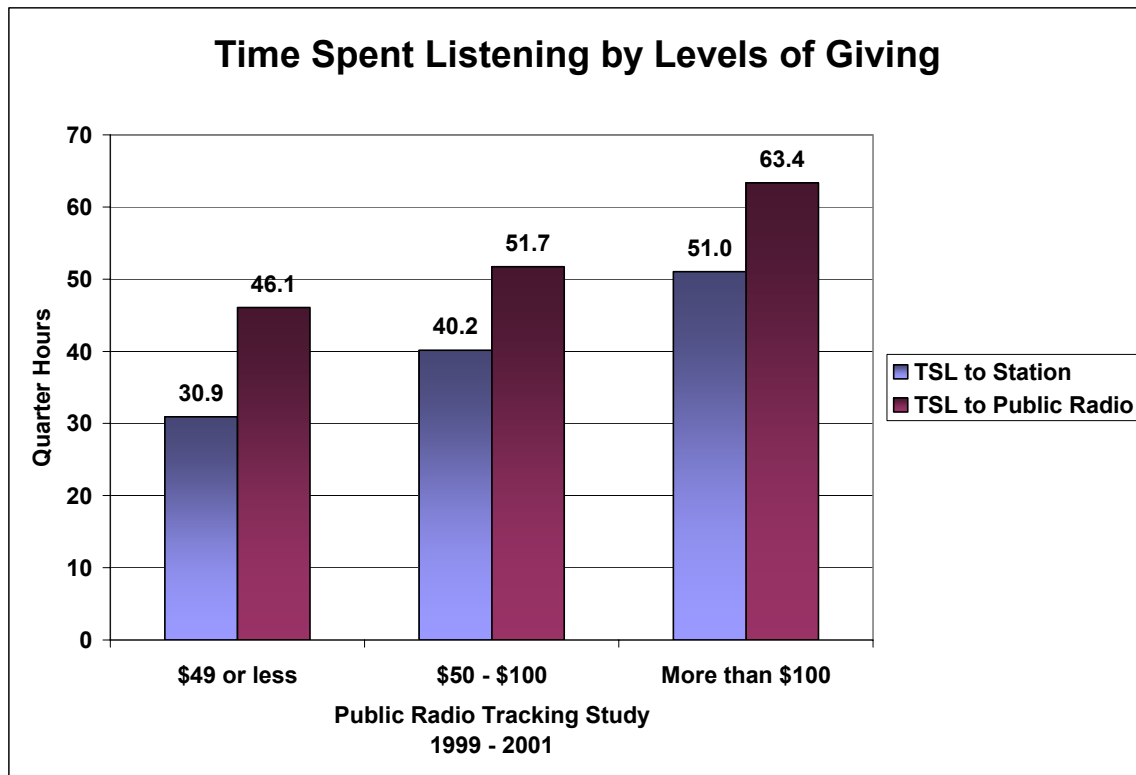
Light Givers average 6.9 occasions of tune in per week.

Heavy Givers average 10.2 occasions per week.

Occasions of tune in, along with loyalty and core composition are all measures of listening behavior. Heavy Givers are characterized by their greater reliance upon public radio programming.

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This chart shows time spent listening. TSL is a measure of consumption. How much public radio did the giver consume per week?

We found that Light Givers averaged only 30.9 quarter hours of listening to the station that received their gift.

Moderate Givers consumed 40.2 quarter hours of listening.

Heavy Givers consumed 51 quarter hours.

TSL is an indicator of reliance upon public radio. As the program director improves the format, time spent listening will increase. Greater reliance moves givers up to the level of Heavy Givers.

That is how our leading major market stations attracted more Heavy Givers.

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Personal Importance

Conceptually, personal importance is the internal realization that public radio has become important in your own life. Personal importance has nothing to do with altruism.

Here is how we measured personal importance in our recontact questionnaire:

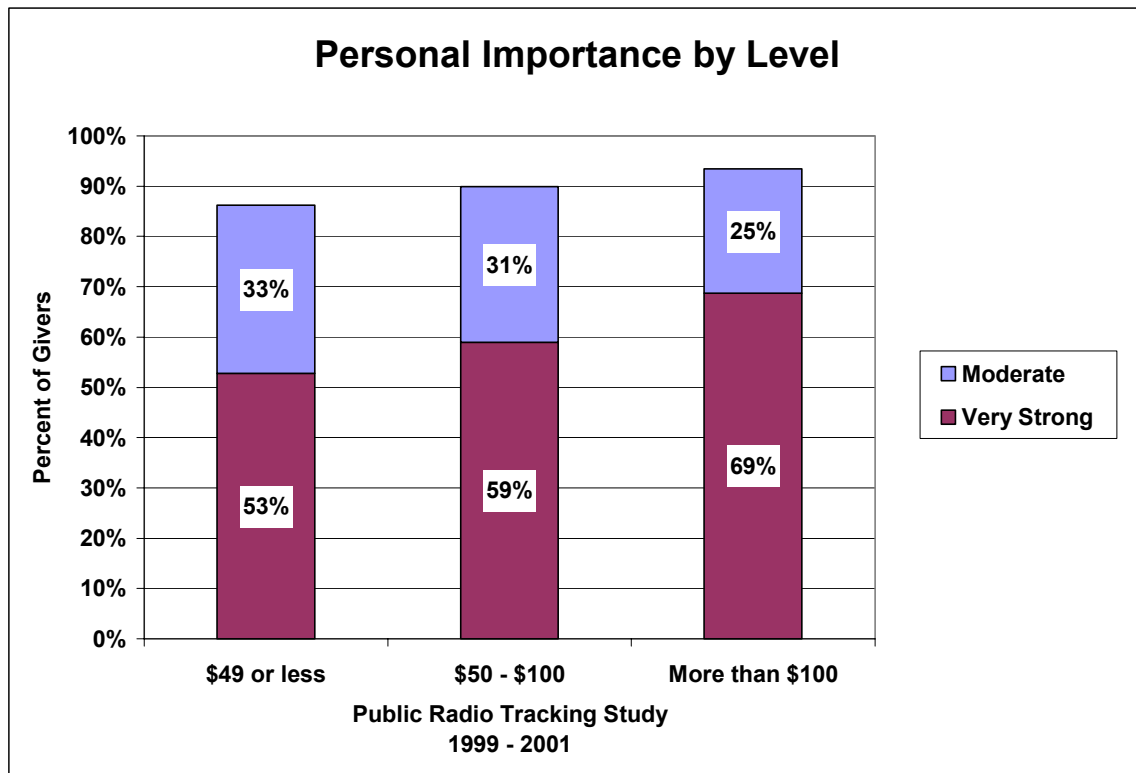
“The programming on [STATION] is an important part of my life. If it went away I would miss it.”

The response format was a six-point scale from very strongly agree to very strongly disagree.

The following chart shows how personal importance relates to level of giving.

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Because we are only looking at givers in this report, personal importance is already strong for most of our respondents. The chart only shows two points from our six-point personal importance scale—moderate and very strong.

Yet you can see how very strong personal importance differentiates givers by levels of giving.

53 percent of Light Givers reported very strong personal importance.

Very strong personal importance rises to 59 percent among Moderate Givers and 69 percent among Heavy Givers.

Program directors must design formats that not only build reliance in terms of listening behavior but also generate personal importance in the lives of givers.

Givers will give at higher levels when they realize more and more that public radio programming has become very important in their lives.

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Belief in Listener Support

In our previous report we confirmed that givers are more likely than non-givers to hold the “right” beliefs about funding.

Here is the statement from our recontact survey:

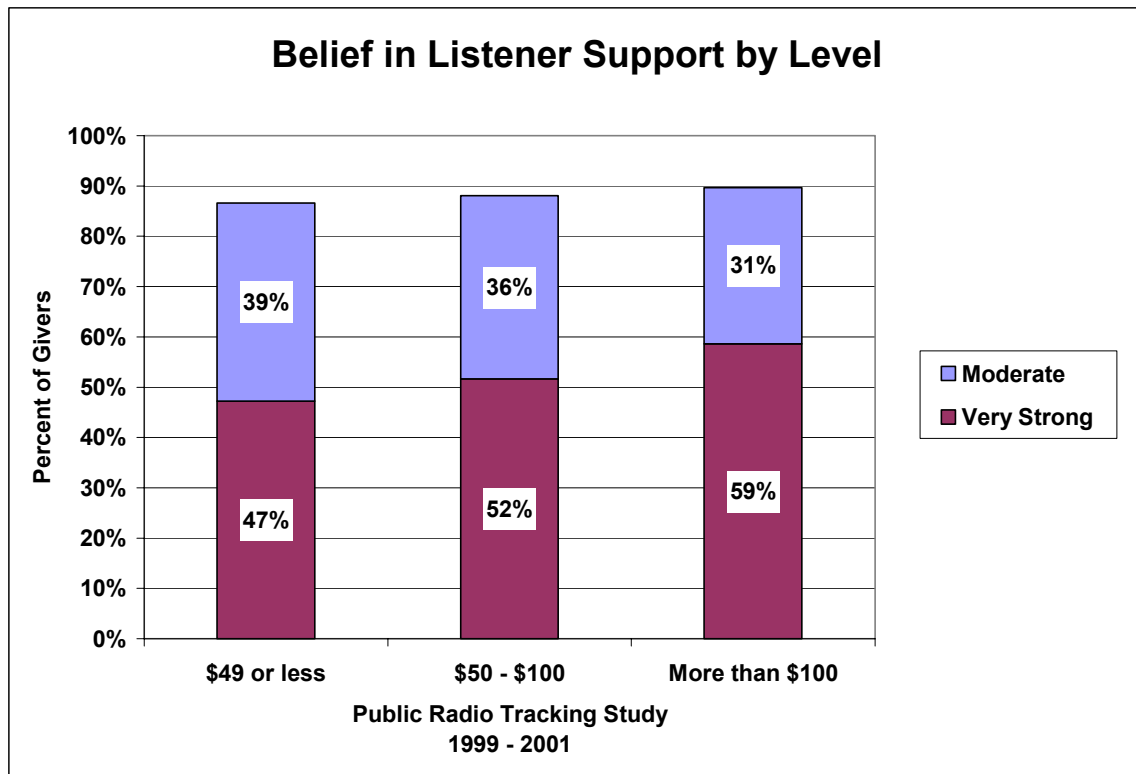
“I generally think of public radio as being financially supported by contributing listeners.”

The response format was a six-point scale from very strongly agree to very strongly disagree.

In this report we wanted to determine whether beliefs about funding separated givers who give at different levels.

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We are only looking at givers, so the chart above shows only two points from our six-point scale.

47 percent of Light Givers believe very strongly that public radio depends upon listeners for financial support.

Heavy Givers are different. 59 percent very strongly hold that belief.

Reliance upon public radio and personal importance are the forces that elevate givers to higher levels of giving. It also helps to have the right beliefs about how public radio is funded.

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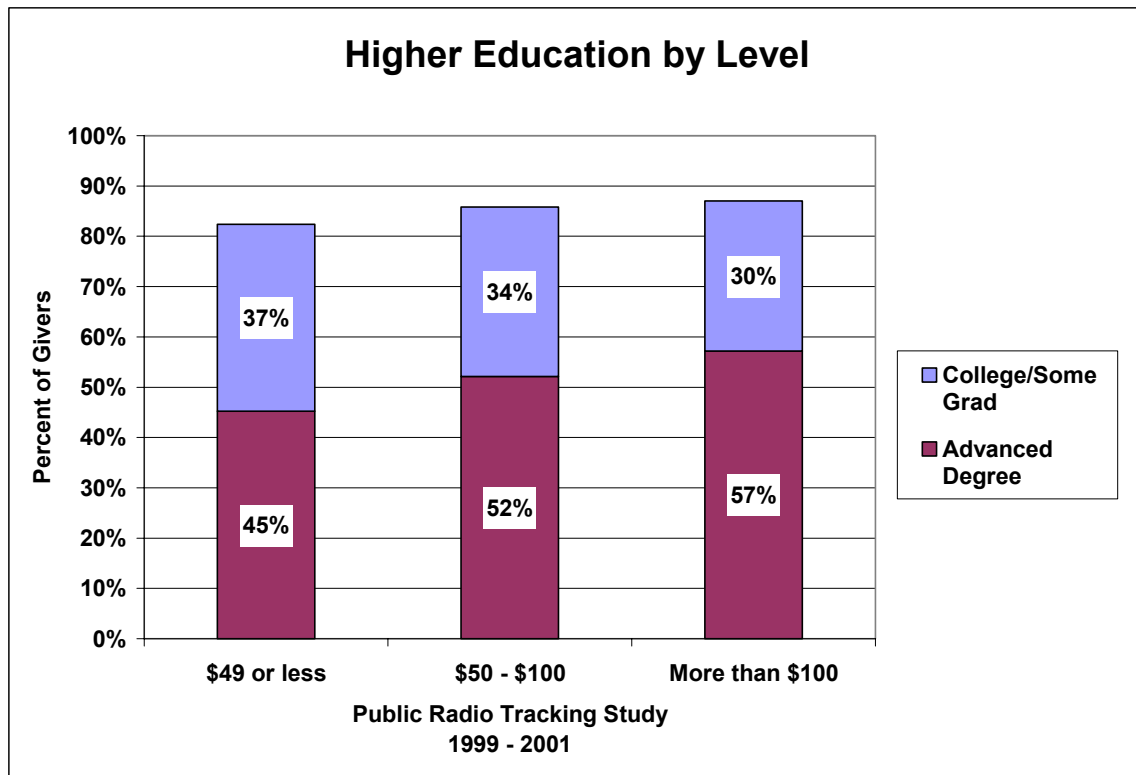
Education

Our previous report confirmed that public radio listeners with advanced degrees are more likely to become givers. In this report we extend that finding to levels of giving.

Heavy Givers are the super-educated segment of public radio givers.

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45 percent of Light Givers have earned advanced degrees like an MA, PhD or MD. Of course, that is way above the general USA population.

But 57 percent of Heavy Givers have advanced degrees—outrageously above the general population.

There are two reasons why givers with advanced degrees are more likely to give at higher levels.

First, super-educated givers are highly concentrated in elite psychographic segments of the population. In the VALS typology, updated after *Audience 98*, they are now called Thinkers and Innovators. Public radio programming satisfies their needs.

The second reason why super-educated givers are more likely to give at higher levels is because they generally have more money.

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The D-Factor

In this report we have demonstrated that public radio's listener support is a function of its public service. Heavy Givers are generated by programming.

Nevertheless, there are public radio stations whose development departments over perform or under perform on critical measures like net income after development expenses.

That's what *Audience 98* called the D-Factor. Programming is the P-Factor.

Even the best development department would have a difficult time trying to renew and upgrade a giver who is not so dependent upon public radio.