A single factor predicts just over half of the differences in audience share among classical music stations – market educational level, as measured by the percent of adults who are college graduates.

Classical music stations cluster closer together in their shares of listening than public radio’s news stations. All but a few earn between 1 percent and 2.5 percent of the radio listening in their respective markets. That said, we still observe that some classical stations claim audience shares that are two, three, and four times that of others.

What explains those differences?

In this report we use advanced statistics to evaluate the predictive power of numerous variables, some of which are attributes of the market and others that reflect patterns of use and the demography of the station’s audiences.

Our examination focuses on classical music stations in the 44 markets measured by Personal People Meters as of summer 2010.

This report is part of a series examining the performance of classical music stations. At the conclusion of the series all of the reports and notes on methodology will be available on the GROW THE AUDIENCE website: www.srg.org/GTA

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MARKET SIZE: No Relationship

Some observers assert that it is harder for classical stations to capture audience share in a larger market with greater population.

San Francisco and Chicago are both very large markets. Yet KDFC’s share in San Francisco is 3.1 while WFMT’s share is only 1.3.

Washington is about the same size as Dallas, yet WETA’s share is four times the share of WRR.

KQAC in Portland and KPAC in San Antonio are in similar sized markets, but with very different shares.

Statistically, there is no significant correlation between market size and audience share – thus no regression line.

X axis is metro market population
It is often assumed that more stations in a market make it harder for classical stations to capture shares of listening.

 Arbitron lists 70 stations in San Francisco – KDFC does over a 3 share.

 There are about 50 stations listed in both Philadelphia and Washington DC – WRTI earns a 1.3 share and WETA gets a 4.4 share.

 The market with the fewest competing stations is Norfolk, but WHRO does less than a 2 share.

 Statistically, there is no significant correlation between number of listed stations and audience share – thus no regression line.

 X axis is number of stations listed in PPM ratings
MARKET ATTRIBUTES: Education

Population characteristics do matter – some markets are fertile ground for classical radio.

This chart shows share by market college composition 25 plus.

The education level of the market explains 50 percent of the variance in audience share.

Washington, the most educated market, approaches 50 percent college composition and, in fact, WETA has the highest share of all stations in the study. Yet WETA, along with KQAC Portland, performs even higher than predicted by education alone.

KCNV gets a 1.3 share in Las Vegas – that market has the lowest level of college education. KPAC gets less than a 1 share in San Antonio, where about 25 percent of adults are college grads.

X axis is metro college graduate composition 25 plus

Correlation of Share with Market College Composition
Public and Commercial Classical Stations
MARKET ATTRIBUTES: Values and Lifestyles

What about VALS? Populations may be segmented on the basis of psychographics. Two VALS types that dominate the audience for classical music are Innovators and Thinkers (the same types most attracted to public radio news).

Statistically, we investigated whether the VALS composition of markets would add predictive power on top of the market’s level of education. It does not.

This chart shows why: whether we use VALS composition (specifically, the percent of Thinkers and Innovators) or level of education, we are essentially measuring the same attributes.

We prefer to use the market education variable – it is non-proprietary, readily available for every market, and continuously updated by the US Census.

To learn more about VALS, go to www.sric-bi.com/VALS, the website of SRI Consulting Business Intelligence, Menlo Park, CA 94025.
LOYALTY: Core Composition

AudiGraphics measures the internal dynamics of a station’s audience.

Loyalty is what percent of their radio listening goes to station.

Core listeners use the station as their first preference – it is personally important.

The chart illustrates the very strong correlation between these two factors – loyalty and core composition both measure the same thing, the value of the programming to listeners.

The typical classical station generates audience loyalty between 25 and 30 percent. About 30 percent of their listeners are core.

X axis is percent Loyalty among listeners 12 plus
Y axis is percent Core composition

AudiGraphics Spring 2010/Fall 2010
BEYOND EDUCATION: Exploring Other Factors

We examined whether audience loyalty or core composition helps to predict a classical station’s performance in the market.

For example, would the combination of audience loyalty along with market education improve the prediction based on education alone?

The answer: no.

We ran statistical analyses using a number of audience variables – each station’s time spent listening, median age, male/female split, ethnic composition – seeking additional predictive power with respect to audience share. We could not find any variables that added to the effect of market educational levels.

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<th>Internal Audience Dynamics That Do NOT Improve Prediction</th>
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<td>When We Control For Market Level of Education</td>
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PREDICTING AUDIENCE: The Model v. Actual

We are left with a simple model.

This chart shows both the share that would be expected for each classical station, based on a single market attribute – the level of education – and the actual share.

The model accounts for a little over half (.514) of the variance among stations. Even so, most stations fall close to the regression line. For example, KDFC’s share is just about what would be predicted.

SRG and Walrus Research’s 2008 study of classical stations produced a similar one factor, market-education model. But it explained half again as much of the variance. Is the change a reflection of the switch from diaries to meters? The inclusion of additional markets in the analysis? Other factors? We are not sure.
OUTLIERS: What Can We Learn?

There are a few stations that perform significantly better or worse than the prediction.

On the upside, KQAC Portland is extraordinary – 1.8 share points above expectation. We note that in our companion study of public radio news stations, KOPB Portland was also a big “over performer.” What is it about Portland and public radio?

WETA is 1.3 share points better than predicted. Why?

Statistically, WRR Dallas and WFMT Chicago are the worst performers, but in ratings terms they are only about half a share point lower than the model.
For this analysis we identified classical stations that met the following criteria:

- Programming a classical music schedule on weekdays 6am-7pm.
- 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 averaged used AudiGraphics data for Spring 2010 and Fall 2010.

We included commercial classical stations in this report focused on audience performance. Prior research, such as PRPD and SRG’s The Value and Values of Classical Music Radio, show that audience response to commercial and noncommercial classical stations is essentially the same.

We used SPSS to run partial correlations and linear regression.

Over 50 percent of the variance in station performance can be predicted by the market’s composition of college graduates.