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

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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.
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.
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.

To learn more about VALS, go to www.sric-bi.com/VALS, the website of SRI Consulting Business Intelligence, Menlo Park, CA 94025
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.
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.
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 over performs and WUWM under performs – 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:

- 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.

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*Dependent Variable: Share 6+ Summer-Fall 2010*

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

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

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