The Audience of Classical Stations
In the COVID Epidemic

April 2020

Reality has a way of eventually getting your attention

THE VIRUS

In early March 2020 our lives were changed, suddenly and seriously, by the COVID epidemic.

American families took shelter in their homes. Schools and universities closed, millions of jobs disappeared, no cars were driving the roads.

It was as if the Martians had landed.

And here is what happened, during March 2020, to radio listening:

➢ In markets across the country, radio listening crashed. Levels of persons using radio (PUMM in Nielsen terms) dropped by as much as 50 percent.

➢ Closer examination revealed that the loss of listening happened away from home. That made sense, given that people were staying in their homes.

➢ However, if you thought that radio users would simply transfer their out of home listening hours to the home location, that did not happen.

Keep in mind, we're talking about persons using radio – the sum of all stations in a market – not the experience of each individual station.

ONE LARGE MARKET

Here's a chart that illustrates the crash of radio listening in March.
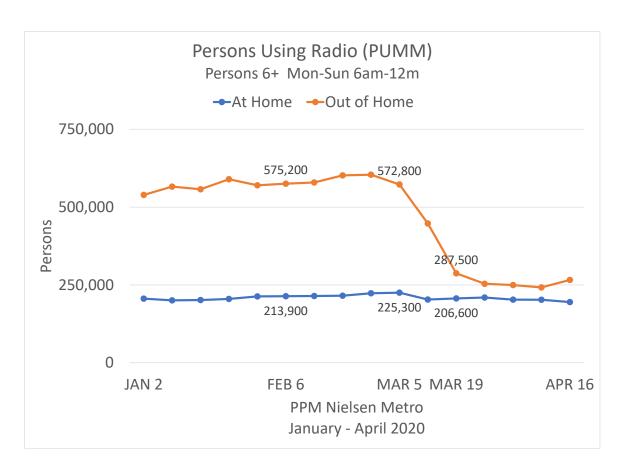
It is based on one large market.

This is Nielsen's PPM data, persons using radio in the metro, trending 16 weeks starting January 2, 2020.

Note the importance of away from home listening. In this market, out of home used to be the dominant location of radio listening.

Keep in mind that PPM does not separate in car vs at work – both are included in out of home listening.

From the week of March 5 to the week of March 19, out of home radio listening crashed.

Yet the blue line shows zero growth in radio listening at home!

Persons Using Radio (PUMM)
Persons 6+ Mon-Sun 6am-12m

◆ At Home   ● Out of Home

PPM Nielsen Metro
January - April 2020

In this large PPM market, the week of February 6, there were 575,200 persons using radio, away from home, in a typical quarter hour.

The at home radio audience was smaller, at 213,900 persons.

By March 19, out of home crashed to 287,500.

NIELSEN RATINGS

No doubt, if you work at a public radio station, you've been tracking the Nielsen ratings. That will give you standard audience estimates, ratings as designed for commercial radio, such as AQH and share.

Here's a critical insight:

Let's say your station has maintained its audience share.

If overall radio listening (PUMM) in your market has dropped, and you maintain share, your station has lost AQH audience.

Yet public radio is about delivering valuable programming to dedicated, supportive listeners.

How are we going to understand what COVID has done to public radio?

AUDIGRAPHICS

AudiGraphics is a sophisticated analysis of respondent-level Nielsen data.

The central concept in AudiGraphics is loyalty. David Giovannoni designed AudiGraphics to measure the loyalty of public radio listeners, especially the dedicated core listeners who support your station.

AudiGraphics also has the capability to aggregate Nielsen data for public radio across markets. If you're programming a classical station, you want to know how other classical stations are doing.

AudiGraphics allows us to analyze public radio stations by format, even to track network programs across stations.

For this special report, with the assistance of Lori Kaplan at NPR Research, we identified 35 classical stations that reach listeners in PPM markets.

Steve Olson, who distributes AudiGraphics through Audience Research Analysis, and Joanne Church at the RRC gave us permission to publish these findings.

We will show you how the audience has changed, April 2020 vs April 2019.

Okay, you're busy and want to know the major findings right away:

➢ Away from home listening crashed among classical listeners.

➢ 40 percent of classical listeners dropped out of the weekly cume.

➢ <u>Core</u> listeners became even more important, as their loyalty and time spent listening to classical increased.

➢ So now is the time to upgrade your sustainers, ask for higher giving.

Now follow along . . .

THE CLASSICAL STATIONS

Putting market PUMM aside, now we will focus on the classical music format – 35 stations in PPM metros.

This chart shows weekday listening, Monday-Friday, away from home.

The thin line shows weekday out of home listening, a year ago in April 2019. The dark line is the most recent PPM month, April 2020.

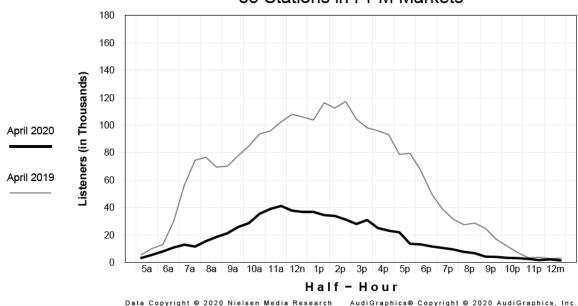Away from home includes in car, at work or any other away location.

Note that the 2019 line rose highest in the midday, 10am-3pm, rather than the "drive time" hours.

That pattern was also true in April 2020, although classical stations lost about two-thirds of their away from home audience.

At 11am, in 2019 there were 100,000 persons listening to classical away from home. In April 2020 40,000.

Listening to Public Radio Classical Stations
Away From Home
Monday–Friday
35 Stations in PPM Markets

April 2020

April 2019

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This is away from home listening – perhaps in car or at work.

One year ago, in April 2019, classical listening peaked at 2pm. This year, in April 2020, the audience peaked at 11am.

With the virus, it is not surprising that classical stations lost most of their away from home listening Monday-Friday. Midday was affected as well as the "drive time" hours of 7am and 5pm.

This chart shows what happened to weekday listening to classical music stations – the audience at home.

The dark line is good news!

In April 2020, classical stations gained midday audience from listeners who were at home.

At 10am 140,000 persons were listening at home. That was an increase of 50,000 over 2019.

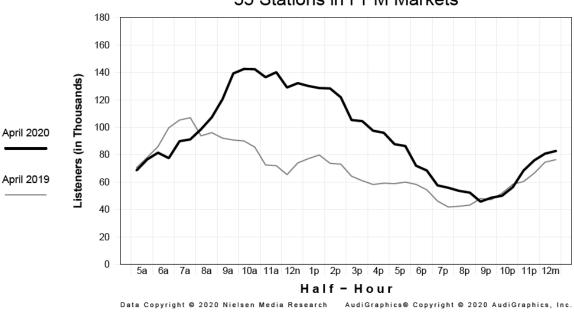Note that the patterns of these two lines are different.

In April 2019 the at home classical audience peaked 7am and declined through the day, to a bottom 7pm.

The 2020 line climbs steeply 9-10am and holds above 120,000 until 3pm.

Both lines fall off 6-7pm, yet they recover in the late evening hours.

**Listening to Public Radio Classical Stations
At Home**
Monday–Friday
35 Stations in PPM Markets

April 2020

April 2019

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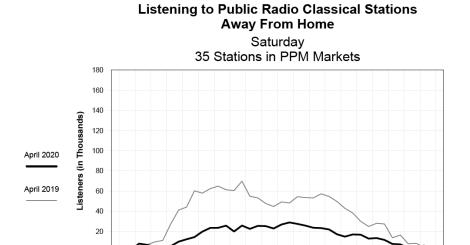
This is at home listening, weekdays, April 2020 vs 2019.

Classical stations gained a lot of audience in the midday, especially 10am through 3-5pm.

Yet flipping back to the previous chart, the gain in at home listening did not completely compensate for lost listening out of home.

SATURDAY

**Listening to Public Radio Classical Stations
Away From Home**
Saturday
35 Stations in PPM Markets

April 2020

April 2019

**Listening to Public Radio Classical Stations
At Home**
Saturday
35 Stations in PPM Markets

April 2020

April 2019

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Here is away from home listening on Saturday.
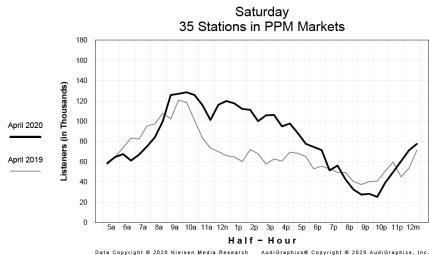
Back in 2019, there was a plateau from 9am to 5-6pm in classical audience, away from home on Saturday.

That audience was not as large as Monday-Friday, yet classical stations did benefit from some out of home audience on Saturday, especially 9am to 1pm.

With the virus, in April 2020 we lost half of that Saturday away from home listening. The dark line is pushed down.
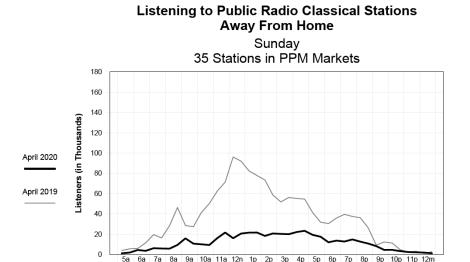
Here is the at home listening to classical stations Saturday.

In both years the Saturday at home audience peaked around 9-10am – with 2020 just a little higher than 2019.
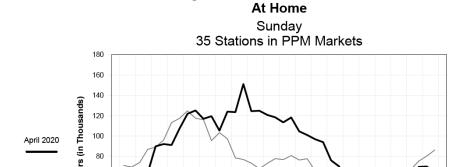
The big difference was 12 noon to 6pm. On Saturday afternoon in 2020 the classical stations gained significant at home audience.

At 1pm the dark line for 2020 is nearly double the 60,000 who were listening in April 2019.

SUNDAY

Listening to Public Radio Classical Stations
Away From Home
Sunday
35 Stations in PPM Markets

Listening to Public Radio Classical Stations
At Home
Sunday
35 Stations in PPM Markets

This chart is Sunday away from home listening.

In April 2020 there was significant loss of classical listening Sunday away from home.

It used to be that nearly 100,000 persons were using a classical station at 12 noon Sunday, out of home.

This year the dark line barely touches 20,000.
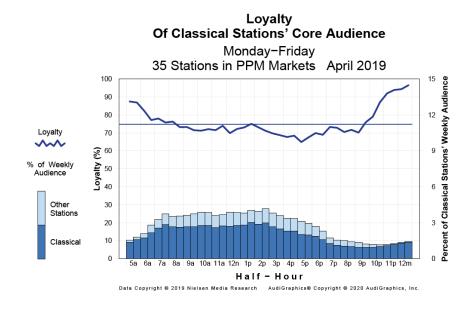
Here is the at home classical audience on Sunday.

We see patterns that are very similar to Saturday at home.

From early morning through 10am, the two lines track.

Yet in the early afternoon, in 2020 the classical stations gained audience. The dark line runs significantly higher than the 2019 line, from 12 noon through 5-6pm.
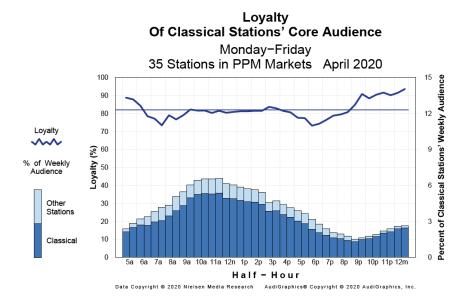
Loyalty
Of Classical Stations' Core Audience
Monday–Friday
35 Stations in PPM Markets   April 2019

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Loyalty
Of Classical Stations' Core Audience
Monday–Friday
35 Stations in PPM Markets   April 2020

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Working with stations, we advise that this may be the most important chart in AudiGraphics. Core listeners (P1) generate most of the audience and reliable giving.

In April 2019 core listeners were 75 percent loyal to the classical station. The squiggly line shows how their loyalty stretched on weekdays, from early morning into the afternoon. Loyalty dipped to 65 percent around 5pm.

The light blue bars show when core listeners crossed over to competing stations – mostly during the day, much less in the evening. The dark blue bars show core listeners using the classical station, as of last year.

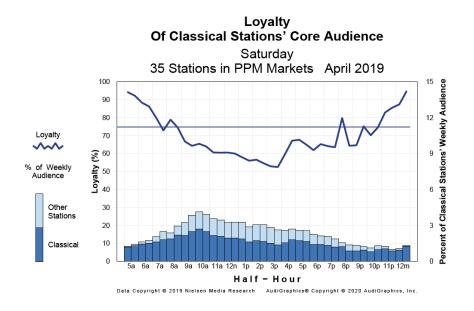Here is the core loyalty chart for weekdays April 2020.

Overall, core loyalty got even stronger, up to 82 percent.

Now compare the dark blue bars to 2019. They are a lot higher this year! That means increased listening to the classical station by your most critical segment, the core.

At 11am the user rating (on the right axis) rose from 3 percent last year to 5 percent in 2020.

Classical became even more important to its core listeners, no doubt providing soothing stress relief from the news.

CORE SATURDAY

Loyalty
Of Classical Stations' Core Audience
Saturday
35 Stations in PPM Markets   April 2019

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Loyalty
Of Classical Stations' Core Audience
Saturday
35 Stations in PPM Markets   April 2020

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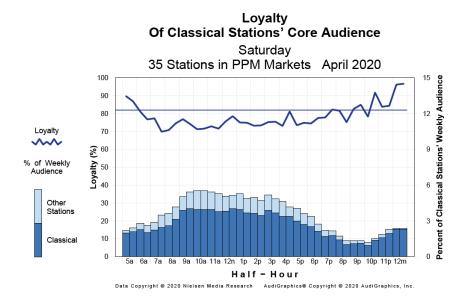
Here is the core loyalty chart for Saturday, April 2019.

The squiggly line shows that classical stations have had a traditional problem with the programming on Saturday.

Keep in mind, we are looking at core listeners who use the classical station as their first preference.

Yet even among the core, from 10am to 3pm Saturday, the critical measure of loyalty degraded on classical radio. By 3pm half of your core listeners who were using radio had switched to other stations.
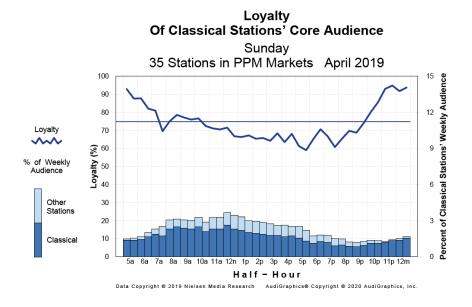
This chart shows core loyalty for Saturday, April 2020.

The squiggly line looks better. It hovers above 70 percent even during the problematic Saturday midday.

And the dark blue bars, showing user rating by listeners in your core segment, are significantly higher in 2020.

As families were more likely to shelter at home, classical stations experienced greater loyalty and more listening from core listeners on Saturday in prime hours.
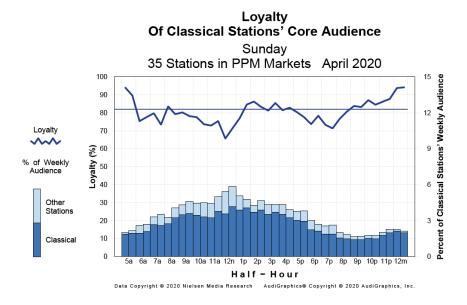
CORE SUNDAY

Loyalty
Of Classical Stations' Core Audience
Sunday
35 Stations in PPM Markets   April 2019

Loyalty
Of Classical Stations' Core Audience
Sunday
35 Stations in PPM Markets   April 2020

In April 2019, core listeners started out Sunday morning with high loyalty to classical stations.

That loyalty drifted below 70 percent in the afternoon, down to 60 percent by 5pm.

The blue bars are important on this chart. The amount of listening by core, while concentrated 8am to 12 noon, was moderate – no dramatic variation.

Here is April 2020, with significant increases in core listening, not only before but also after the noon hour.

The squiggly line for core loyalty rose above 80 percent from 1pm through 4pm. The dark blue bars are higher.

Again, with families sheltered at home, Sunday afternoon became a good time for core listeners to enjoy classical.

Here is what happened to Weekly Cume:

	April 2019	April 2020
Listeners	5,010,400	2,943,000
Core Segment	1,922,300	1,561,400
Fringe Segment	3,088,000	1,381,600

Classical stations in PPM markets lost 2 million listeners – 40 percent of the weekly cume.

Of the lost listeners, 1.7 million were fringe. 360,000 were lost from the core.

Here is what happened to Time Spent Listening:

	April 2019	April 2020
Hours: Minutes	3:52	5:45
Core Segment	7:54	9:10
Fringe Segment	1:21	1:54

Those listeners who stayed with the classical station in April 2020 exhibited higher levels of time spent listening.

In the core segment, TSL increased by more than an hour per week.

Even in the fringe, TSL to classical increased by a half hour.

Here is what happened to Loyalty:

	April 2019	April 2020
Percent of Radio Listening	31%	43%
Core Segment	75%	82%
Fringe Segment	10%	12%

Listener loyalty to the classical station improved from 2019 to 2020.

Core listeners – most likely to give – upgraded their loyalty to 82 percent.

Only 18 percent of core radio listening went to other formats, such as news.

IMPLICATIONS

If you skipped all the evidence and looked here:

➢ Listener support for classical stations should be secure.

➢ We know that because dedicated core listeners increased their loyalty.

➢ The lost cume consisted primarily of fringe listeners, who listen less often.

➢ Classical music relieves stress, especially as escape from the news.

➢ Now is the time to upgrade your sustaining givers.

METHOD

In terms of research design, the epidemic presented what we call a natural field experiment.

The independent variable was away from home radio listening. That variable was not manipulated by researchers, but we could measure the consequences out in the field.

The epidemic will pass, yet it's possible that this field experiment revealed the near future for radio. Your next car, perhaps driverless, will include digital streams of audio, video and social media – dire competition for FM.

We could not have produced this report without the generous cooperation of Lori Kaplan at NPR, Joanne Church at RRC, Steve Olson at ARA and David Giovannoni, the designer of AudiGraphics.

March 2020 was the PPM month when radio use was changing from familiar patterns to a novel reality.

The PPM month of April, 2020, consisted of 28 calendar days running March 26 to April 22.

David and Lori compiled a comprehensive list of 35 public radio stations that broadcast a classical format and reach listeners in PPM metro markets.

7 of those stations generate half of the listening:

WQXR-FM
KUSC-FM
WETA-FM
KDFC-FM
WRTI-FM
KSJN-FM
KING-FM

ARA intends to deliver custom monthly reports going forward for PPM May and June 2020, delivered to stations that subscribe to AudiGraphics.

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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.