

Walrus Research

Core Values

Classical Music Format

Focus Groups

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“A necessity for my soul . . .”

--- classical listener

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Introduction

This research is the result of a convergence of priorities between the Station Resource Group and the Public Radio Program Directors.

Last year the Public Radio Program Directors organization sponsored research into the Core Values of local information programming. We conducted focus groups in four markets where the NPR news station produced a daily local information program. As a priority for 2002, the PRPD intended to extend its Core Values research into classical music.

At the same time, the Station Resource Group set its own priorities with reference to the value that listeners find in programming. The SRG intends to improve the development and presentation of distinct, multiple services in local markets, with the appropriate balance of public service, listener value and financial sustainability.

Accordingly, SRG and PRPD decided to pursue this research together, collaborating on the broad research design and jointly recruiting four station partners. Together they convened a “Sounding Board” of national and local classical programmers.

The first report of this research was presented at the SRG planning conference in San Francisco. Then we gave a major presentation at the PRPD conference in Cincinnati.

Credits

Marcia Alvar of PRPD and Tom Thomas of SRG acted as co-managing partners of this project. The station members of each organization indirectly provided financial support.

KBAQ Phoenix, KPAC San Antonio, WNED Buffalo and WQED Pittsburgh provided direct financial as well as logistical support.

The Corporation for Public Broadcasting provided major funding through its support of SRG’s larger project, which is titled Charting the Territory.

Context

Tom Thomas explained SRG's perspective in these terms:

Public radio is clearly moving in the direction of multiple, differentiated program streams in which focused formats increasingly stand alone on a given station's schedule . . . We need a sharp understanding of the unique appeal, core values and importance to listeners of each of our major content choices.

Marcia Alvar and her PRPD board articulated three clusters of research questions:

One cluster centered on the value delivered by the classical music format. Is music the total value? How might the host deliver value?

A second centered on the worldview of classical listeners. If NPR listeners are citizens of the world who connect with universal topics, do classical listeners share an equivalent worldview?

The third cluster centered on implementation. How might the classical music format improve service to core and fringe listeners?

Together, the project partners set three goals:

- *To explore how public radio's classical service can strengthen its value to and connection with listeners*
- *To gain a better understanding of the values and qualities current classical programming brings to those who like it best*
- *To create a vocabulary that clearly articulates those values and qualities*

On a finer level of detail, the joint PRPD/SRG “Sounding Board” asked particular questions like:

How important is local arts coverage?

What information does the listener want along with music?

How do classical listeners react to underwriting announcements?

Qualitative Research

Given these goals and research questions, the appropriate method was a series of qualitative focus groups.

The target was comprised of listeners who prefer the classical music format. We conducted twelve focus groups in six markets. Four of the classical stations were public and two were commercial stations.

This interpretive report includes written verbatims that we collected from twelve focus groups. For additional documentation, Marcia Alvar produced a video of respondents speaking in their own words.

Summary Findings

- We found that the primary benefit provided by classical music radio is stress relief. In twelve focus groups across six markets, respondents told us over and over that they use and value the classical music format because “it is soothing.”
- However, we found that stress relief alone is not a sufficient reason for classical listeners to use a music station. They told us that classical music is not only soothing but also intelligent unlike the pop music heard on smooth jazz or soft rock stations.
- The second major benefit provided by classical stations is clarity of mind. With a clear mind classical listeners can focus like Zen monks, concentrate on a task and do better work, whether on the computer, in the studio or in the shop.
- Thirdly, classical music radio provides an escape from contemporary culture, which target listeners perceive as decadent and ugly. The classical format serves as a refuge that preserves the beauty and majesty of a better time.
- Most of our respondents use classical music to escape from the problems of the world. Accordingly, they mostly avoid the NPR newsmagazines. While NPR news in depth attracts societally conscious listeners, it drives away most classical music listeners.
- We found that listeners who use commercial classical stations share the same values as classical listeners who access the format through public radio stations. They are the same kind of people.
- Classical listeners do not care whether their local station is licensed to be commercial or public. They care that it is classical. However, they object to any announcement, promo, spot or pitch break that “sounds like a commercial” and thus disrupts their serenity.
- Classical listeners use the station for gratification of their private, internal needs. Yet through the station they identify with a small community of enlightened others. Having a classical station in the market means that there is still some hope for civilization.

Design

Years ago, most public radio stations broadcast a dual format of NPR news and classical music—as many still do today. In research studies such as the Denver Project the goal was to improve midday listening by presenting classical music that would appeal to Morning Edition listeners.

Dual-format listeners were a valuable target, not only because they kept listening across dayparts but also because they contributed lots of money.

For this research, PRPD and SRG decided to target listeners who use the full-time classical format. Clearly, they come for the music. We did not include dual-format stations in the design. However, we selected markets where NPR newsmagazines were available on one or more FM channels.

We recruited respondents by asking this question:

When you listen to radio at home, at work or in the car, which radio station do you listen to most often for music?

Most of our respondents were classical primaries. We also accepted classical secondaries.

In the recruitment screener we did not ask about their news listening.

The decision to target listeners from full-time classical stations had immense consequences, because we found ourselves talking with many respondents who did not fit the familiar profile of NPR news listeners:

- Respondents who could not identify the NPR news station in town
- Respondents who knew the NPR station for its music (like the jazz on WDUQ) rather than for its NPR news
- Respondents who rarely or never tuned to Morning Edition or ATC, even if they had the button preset

Markets

Thinking strategically about the growth potential for classical radio, we employed a factorial design to select six markets.

Phoenix and San Antonio

Growing, thriving markets in the Sunbelt represent a strong potential for public radio listening and fund raising.

Consistent with SRG's view of public radio's future, both markets enjoy consolidated single format FM stations.

KBAQ is consolidated with KJZZ, KPAC with KSTX.

Buffalo and Pittsburgh

Declining, older markets in the Rustbelt represent a limited potential for public radio listening and fundraising.

The classical radio station is controlled by a PBS TV station.

WNED in Buffalo is similar to WQED in Pittsburgh.

Seattle and San Francisco

Large, upscale markets in Ecotopia are populated with millions of liberal, affluent, educated Boomers.

Accordingly, the commercial classical format can achieve significant market share and attract upscale advertisers.

KING ranks high in Seattle, as does KDFC in San Francisco.

Given our 3 X 2 factorial design, we would expect similar findings within each pair of markets. We looked for any different findings between the three types of markets.

Agenda

Based on the research questions, we designed an agenda for the focus groups that moved from general impressions of each station to specific critiques of program examples.

I. Introduction

First we explained that respondents were selected on the basis of their radio listening. We did not identify the sponsor of the study.

The moderator was doing a series of focus groups across the country including Phoenix, San Antonio, Buffalo, Pittsburgh, Seattle and San Francisco.

II. Perceptions

A-Station Identity FLASH CARDS

The moderator displayed flash cards with selected radio stations.

We asked respondents to identify each station and describe its format in their own terms.

B-Image WRITE DOWN ON PAPER

The moderator pointed to one station at a time and asked respondents to write down their impressions—any images or associations that came to mind.

In each group we collected images for the classical station and tried to get images for the NPR news station.

C-Differentiation

The moderator used an easel to draw a one or two-dimensional space, based on the images that came up in previous discussion.

III. Reasons for Listening

A-Benefits

The moderator asked respondents to think about the benefits of listening to stations. What personal needs are satisfied by the classical format?

B-Missing the Station

The moderator read a “press release” saying that classical station was going off the air. What would be their reaction?

IV. Aircheck Examples

A-Written Verbatims

Respondents listened to airchecks of local and distant stations, writing down their evaluations of music and stopsets.

B-Discussion

Respondents explained their written verbatims in open discussion.

V. Cultural Institutions

As a final exercise, the moderator asked respondents to think about the cultural institutions in town.

What are the cultural institutions? What are their characteristics?

Can a radio station be a cultural institution?

Music Listeners

Arbitron ratings measure listening behavior. At dual-format public radio stations, only a subset of Morning Edition listeners will do much listening to the midday classical music. In terms of Format Imperative AudiGraphics, only a small percentage of listeners qualify as Dual-Format Imperatives.

For example, in Denver when KCFR broadcast a dual format of NPR news and classical music, 10 percent of KCFR listeners qualified as Dual-Format Imperatives.

We also know from Arbitron data that in markets where the classical music is on one channel and the NPR newsmagazines on another channel, while there is some audience sharing, the vast majority of listeners will use only one of the stations.

In Denver—now that KCFR is all news and KVOD is classical—85 percent of Colorado Public Radio listeners use only one station but not the other.

For the 2002 Classical Core Values focus groups we traveled to six markets that contained a full-time classical music station as well as an FM station featuring the NPR newsmagazines.

Our experience confirmed the ratings data: The majority of classical format listeners are NPR news avoiders.

Stations for News

We recruited respondents on the basis of their music listening. But when they arrived on site, we asked them to complete a rescreener that asked about their news listening.

- 55 percent listed a commercial non-classical station as their top preference for radio news.

By commercial non-classical we do not necessarily mean a commercial news/talk AM station. Many of our respondents listed an oldies or soft rock station as their station for news.

Obviously, those commercial music stations present minimal news—just the headline stories.

- Another 13 percent listed the classical station as their top preference for news.

The classical stations in our study presented no more than brief newscasts on the hour.

That minimum was enough. Not one respondent wished that the classical station would do more news.

- 27 percent listed the NPR newsmagazine station as their first preference for radio news.

When we asked for second preference, we picked up another 11 percent of classical respondents.

These represented the NPR news listeners who cross over to classical music during the midday or in the evening.

The rescreener was not the same as an Arbitron diary. We could not count up their quarter hours of format listening. So it would be a mistake to characterize any of our respondents as “Dual-Format Imperatives.”

Perception of NPR News Stations

In each group we asked respondents to write down images that came to mind for various stations. We always picked the classical station. We also tried to collect images for the NPR station in town.

- In two of our twelve groups there was not enough awareness of the NPR news station to conduct the image exercise.
- When we did conduct the exercise, there were several respondents who wrote down “nothing” or “blank” because they had no perception of the NPR news station.
- We found that many classical respondents knew the NPR news station in town for its off-prime music or entertainment programs, rather than the NPR newsmagazines.

That third bullet is critical. While managers might think of WDUQ or KPLU as an NPR station—with all that implies—the NPR newsmagazines had minimal or no salience among our classical respondents.

Here are their written verbatims:

KJZZ**Women**

News, information of all kinds—like reading the newspaper or even a book while I’m driving. Learning while I do mundane things. Makes me feel I’m doing something worthwhile. Never listen to the jazz.

Jazz, energizing, fun, toe tapping

Blank

Don’t listen to it—cannot evaluate, but call letters suggest jazz

Jazz, lounge

Keeps me well informed during day, evening great jazz esp Marion MacPartland

Jazz, news, NPR, sister station of KBAQ

Haven't listen much, talk, interviews, jazz

NPR, jazz, Talk of the Nation, Blaze Lantana

Nothing

K jazz, informative NPR programs during the day, topical interviews, jazz at night, important perspectives, rhythm and blues Sunday night, Marian McPartland

KJZZ

Men

Weekends, grey

Jazz music just ok, relaxing

NPR news, more background to the stories, jazz

Gerry Mulligan, classical jazz, vinyl

Jazz music, don't listen to it

Easy listening, vanilla, smooth

Irritation, noise, stimulation

Information, interviews, Marketplace

Jazz clubs, coffee shops

Intelligent talk shows, excellent jazz show

Music that relaxes as well as bring back old memories, Oakland California, old girl friends

Interpretation

Sure, KJZZ has call letters that refer to jazz. But KJZZ is solid news and information between Morning Edition and ATC. Yet less than half of our men and women in Phoenix made any reference at all to news on KJZZ.

We found that KBAQ listeners think of KJZZ as a music station.

Several wrote down “nothing” or left the form blank. Only four respondents wrote down the letters “NPR” with reference to KJZZ.

KSTX**Women**

BBC, information

NPR sister station, talk vs music, don't listen often, Dierdre Sarabia

Don't listen to it

NPR, public radio, some classical, some international news, San Antonio is poor for international news, poor newspaper, only one, mostly killings and local news

Music, must not like it, because I don't listen to it

Don't listen to it

Ideas on many topics, national interviews, familiar interviewers, Diane Ream

News, national, in depth analysis, BBC, will present two sides, Carl Castle

Never listened

Interesting, informative

Soothing, nice feeling, global

KSTX

Men

Talking, don't listen to it

News, information, political issues, consumer information

News, balance, serious, soothing tone

Fairly modern music

NPR, PBS, liberal orientation

News and information, perspectives on local and world events,
detailed reports

Informative

Public radio, good talk shows, news

News, keep up with world events, debates on issues, talk of the
nation

Contrary opinions, liberal bias, Democratic viewpoint, anti-
conservatism, British viewpoint

Blank

Interpretation

KSTX does not play music. Yet only five respondents in San Antonio wrote down an image of "NPR" or "BBC."

And awareness does not mean liking. One respondent wrote "talk vs music, don't listen often." Another wrote "talking, don't listen to it."

Buffalo

Women

Not enough awareness to do NPR station

WBFO

Men

Drawing a blank

Jazz

Jazz music, liberal news network, talk shows

What station is it?

Do not listen

An old friend of mine had a jazz program and he played requests for me

The color black

Jazz, a lot of talk, not interesting to me

Black radio station

Sound, jazz, talk

My mother listens to it

Interpretation

In Buffalo we did not have enough awareness of WBFO to conduct the exercise among women. Not one of the men mentioned NPR, but five mentioned the off-prime jazz music on WBFO. After all, these people use radio for soothing music—not for in depth discourse.

WDUQ

Women

Very seldom do I listen, very relaxing

I'm not familiar with it

Jazz, Tony Mohab

Jazz, Anderson Lewis, factual news

Jazz, good talk about current events

Not familiar with this station, may have listened to it while switching channels

Duquesne and jazz

Jazz, wonderful jazz

Blank

Don't listen to it, not a jazz fan, nada

Great jazz, snapping fingers and tapping feet

Listening to jazz music, have a tape with some of this

WDUQ

Men

Education, Duquesne University, knowledge

NPR news, jazz music

Jazz

Don't listen to it, nothing

Light company, Duquesne Light

Classic

NPR news

Remembering Tony and where he comes from jazz

News/NPR

Duquesne Univ run radio station

Click and clack on Sat, All Things Considered, jazz music,
Duquesne University, NPR News, Tony Mowed jazz music, Cookie
Roberts

Interpretation

12 respondents in Pittsburgh thought of jazz for WDUQ. Only 6 made any reference to news or NPR.

Clearly most of these people find little value in the NPR newsmagazines.

KPLU

Women

All Things Considered, jazz to clear the mind, smokey voices (all their announcers sound like they are smokers)

Not easily recognized by me

Lake Wobegon, voices bland

NPR liberal, trad jazz

Blank

Jokes

Intelligent conversation, world news, Pacific Lutheran University

My favorite, innovative, good talk news and music, educational

Great programming, NPR programs, in depth news

Blank

Public radio—excellent interviews—national/international scope, Lake Wobegone

Seattle

Men

Not enough awareness to do NPR station

Interpretation

Five of the Seattle women made reference to NPR or world news on KPLU. We might expect to find more Actualizers in Seattle than in Pittsburgh. Yet, among the men there was not sufficient awareness of KPLU or KUOW to conduct the exercise.

**KQED
Women**

Car Talk very funny, Irish folk music for most of Saturday afternoon, news, interview, BBC

Education, probing analysis, learn lots, sometimes obvious mouthpieces, Terri Gross, great music, cultural history, Garrison Keillor genius, This American Life, pledge drives, short stories at nite, Michal Krasny

Cerebral, intellectual, need to focus, political interesting interviews, noncommercial, academic, should listen, Fresh Air, MacNeil Lehrer

Variety of programs, commercial free, international perspective

A lot of talks, sometimes they are boring, other times it has some good info

Fresh Air, talk shows, in depth interviews of worldly sometimes famous, usually interesting individuals

Intelligent listening, Michael Krasne is awesome, Terry Gross interesting interviews, love Car Talk, Wait Wait Don't Tell Me-love, hate pledge drives

Garrison Keeler, Minnesota, story telling, cried once, honest news, ethnic music, interviews, hate pledge drives

TV educational

Don't listen to that one

More trustworthy, objective reporting, no loud advertising, some good interviews

KQED

Men

Channel 9, special program on science health life, great old films
occasional, fund raiser!

Fund raising, public interest stuff

Educational, TV channel 9

Public broadcasting, news prog

Auctions, contributions

NPR Morning Edition, All Things Considered, was great during the
89 earthquake, local PBS affiliate, predictably good source of
PBS/NPR programing

Morning Edition, Commonwealth Club, reliable

Intellectually interesting, stimulate thought, Click and Clack

NPR, All Things Considered, liberal, good reporting, California
Report, Ben Schatz, too many fundraisers, talk radio

McNeil Lehrer on radio, similar to 91.7 nationally syndicated
programs, offers programs of interest

Tired of their fund raisers, I like NPR and that's the strongest signal

Interpretation

Finally, when we got to San Francisco we encountered several classical
listeners who also used the NPR newsmagazines. No doubt that finding
reflects the very high composition of Actualizers in San Francisco, along
with KQED's impressive reach in the market.

KQED was also associated with fund drives and educational television.

Perception of Classical Format

In each market we asked respondents to write down their impressions of the classical station. As you read through these verbatims ask yourself:

- What are the benefits delivered by the classical format?
- Is there any difference between public and commercial stations?

KBAQ

Women

Poor reception, beautiful music, classical, orchestra, ex-husband who was a classical musician. While driving it can be hard to relate to—need to hear entire piece to appreciate it, but in a car that can be difficult.

Informative, inspiring, pick-me-up, take-me-away, opera, news highlights, no commercials

Relaxing, calming, sailing

Classical, tasteful, educated listeners, artists not performers

Mozart, Mozart, Mozart, gorgeous opera, my calming force, joke of the office, heaven, parts of my past, new things to discover that I have never heard before.

A necessity for my soul

Classical music, good programming, no ads, NPR

No talk, music, quiet, calm, doesn't butt in to my thinking, soft, calming, teaching about music terms

Classical, Mozart, KJZZ

Good music, calming, great composers, NPR, info on current performances

Classical music, Mozart Buffet 12:00-1:00, Performance Today, interviews and performance by live musicians.

KBAQ

Men

Relax, family

Very very relaxing, going to a good concert

Relaxing, intelligent, fresh, concerts

Soothing, exciting

Relaxing, quiet forest meadow on a spring day, awaken the senses

Sunday mornings

Soothing music, relaxation

Beautiful music, intelligent announcers

Symphony, morning commute, season tickets

Best music on the radio

Pleasant, soft, peaceful area, relaxed, Pavaratti

Interpretation

Phoenix was our first market, and right away we heard the reasons why classical listeners use the format:

Relaxing, calming, sailing

A necessity for my soul

Soft, calming

Very very relaxing

Soothing

Quiet forest meadow on a spring day

Here's an important point about the word "soothing":

Our respondents were not describing the music per se; rather they were describing the physiological and mental effects of classical music listening.

This point is important, because the music played on KBAQ varies from loud to soft, fast to slow, major to minor. When our respondents used the word "soothing" they were not referring to a category of classical music.

By listening to classical music they relieved stress.

They entered a dream state—a certain mood often characterized by imagery of clouds, water or peaceful gardens.

The classical format could lift them away, floating up to a better place.

KPAC**Women**

Quiet, escape, reflective, meditation, Star Date

Performance Today, Star Date, cultured listening, elite, love of music, 5th grade, variety of cultural music

Classical, soft, interesting, positive, Performance Today

Plays classical, my station, on Sundays choral classical, has great programs—Performance Today, Pipedreams (pipe organs), From the Top. Doesn't get on your nerves, like lots of vocals things. Helps me know what other musicians in San Antonio are doing. Probably everyone who listens is from somewhere else.

Soothing, calmness, peaceful, like going to concert imagining musicians playing their strings, woodwinds, brass.

Soothing, classical, list who played, road/traffic intermit.

Classical music, Randy Anderson, Carl Haas, teaching session, no commercials, easy to wake up to, listener's choice, call in requests.

Good music, comfort, Chris O'Reilly show, soothing, organs, Pipe Dreams, Star Date, Celtic music, informative, Carl Haas prog, Garrison Keeler, short prog on notes of the day.

Great classical, educational, voice, no commercials—great, positive

Soothing, energizing, educational and ads, star date, Keillor

Old times, music, soothing, meditative

KPAC

Men

Soothing, calm, slow and measured, no commercials, little talk

Classical music, performance, opera, relaxation

Classical music, easy listening, mind-free, relaxing

Good classical music, informative about music

Classical, classy, excellent format

Classical music, informative announcers talk about classical music, 24 hour programming

Classic guitar music, beauty, poetry, education, my dream of being a classical musician, Peter and the Wolf

Classical, wonderful, educational, relaxing, great programming, Carl Haas, From the Top

Relaxing, informative

Classical music, all varieties, dependable, reliable, satisfying, competent staff, top quality products

Classic, calm

Interpretation

In San Antonio, the key word again was “soothing.” Synonyms included “reflective,” “escape” and “relaxing.”

San Antonio used to be a cow town before high tech drew educated migrants to the Sun Belt. Respondents perceived KPAC in terms of “beauty, poetry” and “cultured listening.”

WNED

Women

Great, relaxing and soothing, also has hourly news to keep us informed, makes errands more pleasant

Lights up my day, share with my 4 yr old granddaughter on the way to day care. Classy, classic, uplifting, gives creates a whole different atmosphere as you drive thru the area, I see life around me in a different light, I find my older children listening. A star for the Buffalo area.

Classical, orchestras, exciting but relaxing, educational

Classical music, listen to at work, relaxing, listen at home w/dinner, memories of when played violin

Relaxing (panic attacks), calms me down, relaxes my heart, (sometimes change station)

Classical, violins, advertisements on music events, holiday concert and music

Relaxation, classical, memories when we went to. . .

Knowledgeable on air personnel, good repertoire, best of classical music selections, part of business life

Classical music—no commercials, the music nurtures my soul, I like the hosts

I like it! It reminds me of the BPO!!!

Classical, cultural, educational, helps me wind down at end of day, I have a son with ADD—relaxes him, calms him down, good news coverage

Classical music, soothing, relaxing

WNED

Men

Long stretches of music

Classical music, listen to station frequently

Classic music

Classical, somewhat easy listening

Soothing, calm, serene

Begging for dollars

Relaxation, loosen up, order, organization, predictable, intellectual, elitism

Relaxing, educational, great exposure to all kinds of classics

Nice music

Good to listen, easy

Few commercials

Interpretation

By the time we got to Buffalo we realized that the soothing effect of classical music could be therapeutic to certain respondents.

One woman told the group about her panic attacks. Another had a son with ADD. These were not just personal stories, because the other respondents around the table agreed that classical music could have healing effects.

Rustbelt Buffalo has declined in population rankings. Its economy is rough. Respondents said WNED was “a star for the Buffalo area.”

WQED

Women

Also very relaxing, love to listen when I'm relaxing and ready for a nap, it's very clearing to my mind

Classical music, soft, relaxing, great music, good variety with all the instruments, educational, good radio voice—soothing

Classical music, husband's favorite, got me hooked

My station, it knows me, music for the soul, stories of artists, creative people

Best radio station going, fund raising, CeCe Summers—don't like, weird music—too much

Relaxing, refreshing, energizing

Relaxing, soothing, classical, piano and violins, fund raising

Symphony and all classical music, cultural and terrific to paint in my studio

Relaxing, clear head, calming

Classical at its best, lunch w/Amadeus, intro to lots of composers and their styles, usually on in my car, even husband will admit turning it on

Riding the carousel, sitting at the symphony, feeling the tempo of the conductor, Prokofiev

Classical, piano, violin, relaxing music, informative, educational

WQED

Men

Viola, orchestra, classical music, Beethoven

Classical music, Prairie Home Companion, Pipe Dreams

Classical

Good music classical, relaxing

Soothing, quiet, relaxing

Classic

Classical music

Haas, learning music

Classical, fund raising

Classical music

No commercials, soothing, relaxing music, more music, symphony, fund drive, classical

Interpretation

Beyond soothing, we began to pick up secondary effects of classical music listening. Pittsburgh respondents used these words:

It's very clearing to my mind

Clear head

In discussion, respondents explained that they listened to classical music to quiet their minds. With a clear, quiet mind the listener could concentrate and do better work, whether in the office or in the studio.

KING
Women

Wish they played more choral music, wish Tom Dahl wasn't so chatty, wish they would play stuff from the 20th Cent more—but the market says 19th Cent

Europe! Invokes thought, story telling (at times) smooth voices

Classical, energizing, symphony, grew up with

Classic King, great atmosphere, education, local support, live by George, film music Friday evenings

Classical, good knowledgeable DJs, Brad Eaton Trumpets, live from recital venues, opera

Classic music, Grand Canyon Suite, Mendelsohn, college class, music and images assoc with rain

Family's favorite, we all agree, car, which we're in 2-3 hrs a day, nonprofit, DJ's voices, can think (or talk) enjoy music in silence

Classical, too much symphony, good announcers, ok news

Evenings by George, opera (Met Texaco and Seattle Opera), good classical choices

Relaxing classics

Excellent scope and range of classical music, love the attention they give to piano, news of arts unavailable elsewhere

KING**Men**

Classic music, relaxation, good driving music

Sleep, the day is done

Great! My station 24 hours

Good music, family, fulfilling

Maroon (color), classical, classical sculpture (Roman, Greek)
symphony, concert hall

Classical, beautiful music, erudite hosts, Bach, Schubert, Hedyn, Yo
Yo Ma

Classical music, restful, soothing

Classical, opera, soothing, fun to listen to

Smooth, quiet, peaceful, relaxing

Great, nice, cool

Classical music, Canon in D, relaxing

Interpretation

In Seattle we talked to commercial classical listeners. The verbatims were the same that we collected from listeners to noncommercial stations.

Invokes thought

Restful, soothing

Relaxing classics

Quiet, peaceful, relaxing

As you read through the KING verbatims, consider what is not there:

There is not one mention of commercials, at least at this early stage of the focus groups. KING's image is the effect of the music--soothing.

KDFC**Women**

Classical, knowledgeable background info, excellent recordings selected, even uplifting at times

Brahms, after a thunder storm, classical music, appreciate concerts, Diane Nicollini music voice, education, little bits re classical composers, too many commercials, blew it w/opera, great holiday programs, SF Symphony, choral music, sailing after drives to beach

Classical, soothing, great to listen to when they are playing Mozart! Table for six, 1st station I tune into, intelligent

Wonderful music, knowledgeable program hosts, positive

Dance, tango, I can get away from the “bad” things of the real world, such as anything negative

Calming, gentle, educational, kids in car, slow, easy listening

Classical music, enjoyable, good for driving, can listen and think at the same time, soothing

My convertible top down in Sonoma going to ride my horse, ex-boyfriend, intelligent, beauty of nature, sense of history, movie “Red Violin” emotional thought opened up, soft voice DJs

Beautiful, classic, do not pay attention to different stations except for KDFC and KGO, sometimes Alice

Classical station, mellow thoughtful music, Mozart, Vivaldi, Brahms, Beethoven, calm in car, good mood, positive

Classical music, intellectual, interesting, beautiful music, good sound (good reception, signal), too much advertising, like liturgical music on Sunday AM, in terms of classical music it's the only game in town, liked women in music on Mother's Day

KDFC

Men

Light classical, Bach, Vivaldi

Educational

Classical, my classical station, relaxing

Classical music, soothing, stimulating

Last survivor

Got much of my education classical music here from Bach to Mozart and Court and Countryside, dependable classical source from early music to early 20th century, great early Sunday morning, classical music is the soundtrack to my soul, above all other kinds of music, it centers me when I am upset or stressed, introspection

Bill Luth (and Wendy), quality classical, annoying commercials

Classical music, soothing

Good music, good announcers, Baroque music, classical music, soothing, intelligent, my station, no opera, uplifted, cut the music into pieces

Classical music, smooth, minimum commercial

Successor to KKHI, only classical station remaining

Interpretation

In San Francisco, as in earlier markets, we heard references to the educational component of classical radio. One man wrote: “Got much of my classical music education here,” with reference to KDFC.

When we played airchecks, the respondents said they appreciated announcers who apparently knew what they were talking about and could pass along information about the music.

Yet when we asked respondents in Seattle and San Francisco to rank the reasons why they listen to classical radio the order was:

First, to relieve stress

Second, to clear the mind

Third, to learn about the music

Among the San Francisco women there were a few recognizable NPR types who attacked classical KDFC for its advertising:

One woman wrote “intellectual, interesting, beautiful music . . . too much advertising.” She was the one who appreciated the “women in music” special on KDFC.

Another wrote “too many commercials,” although the station still reminded her of “sailing after drives to the beach.”

Yet even in sophisticated San Francisco, the key word was “soothing.”

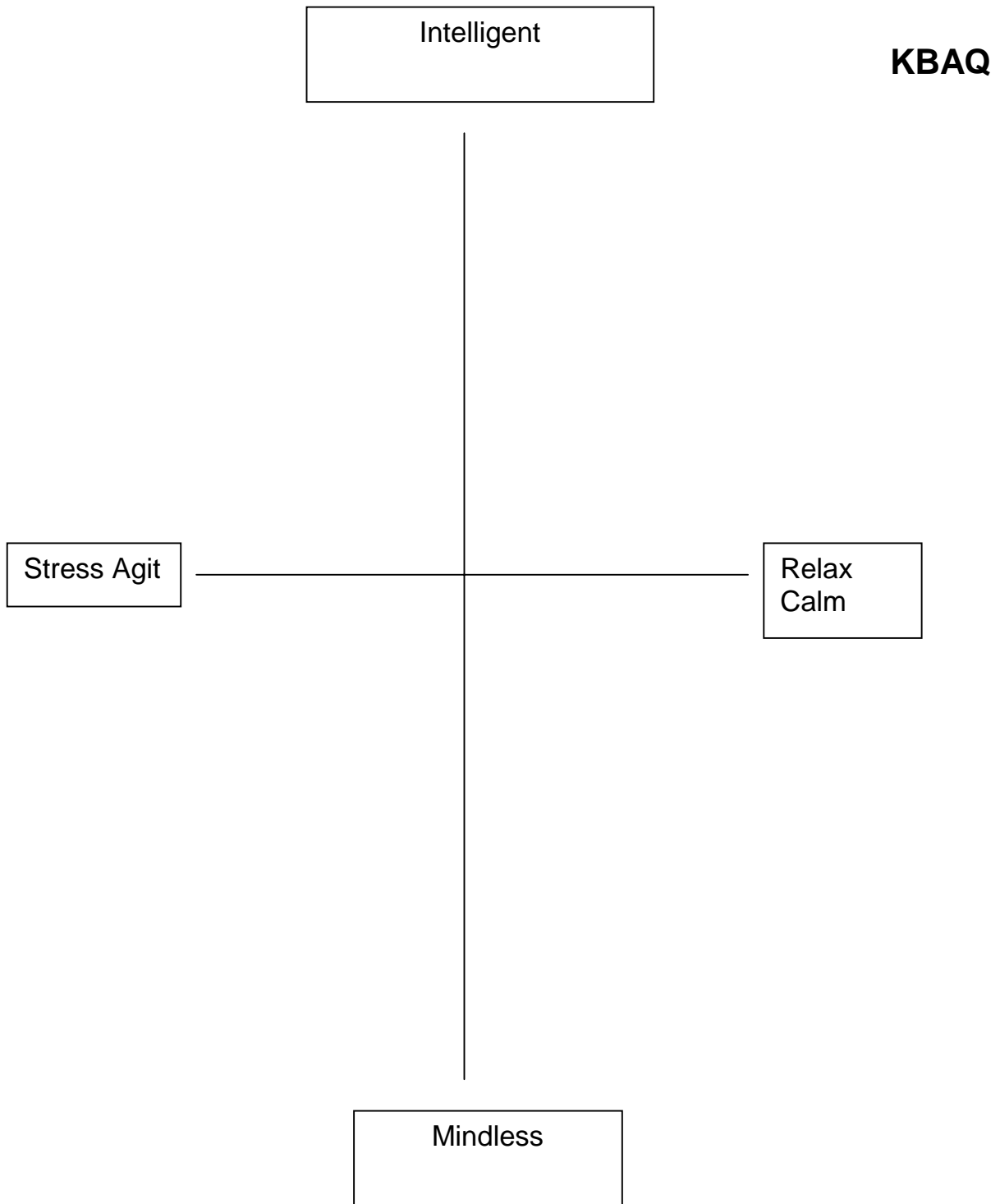
One man described KDFC’s format in Zen terms: “It centers me when I am upset or stressed, introspection.”

Positioning

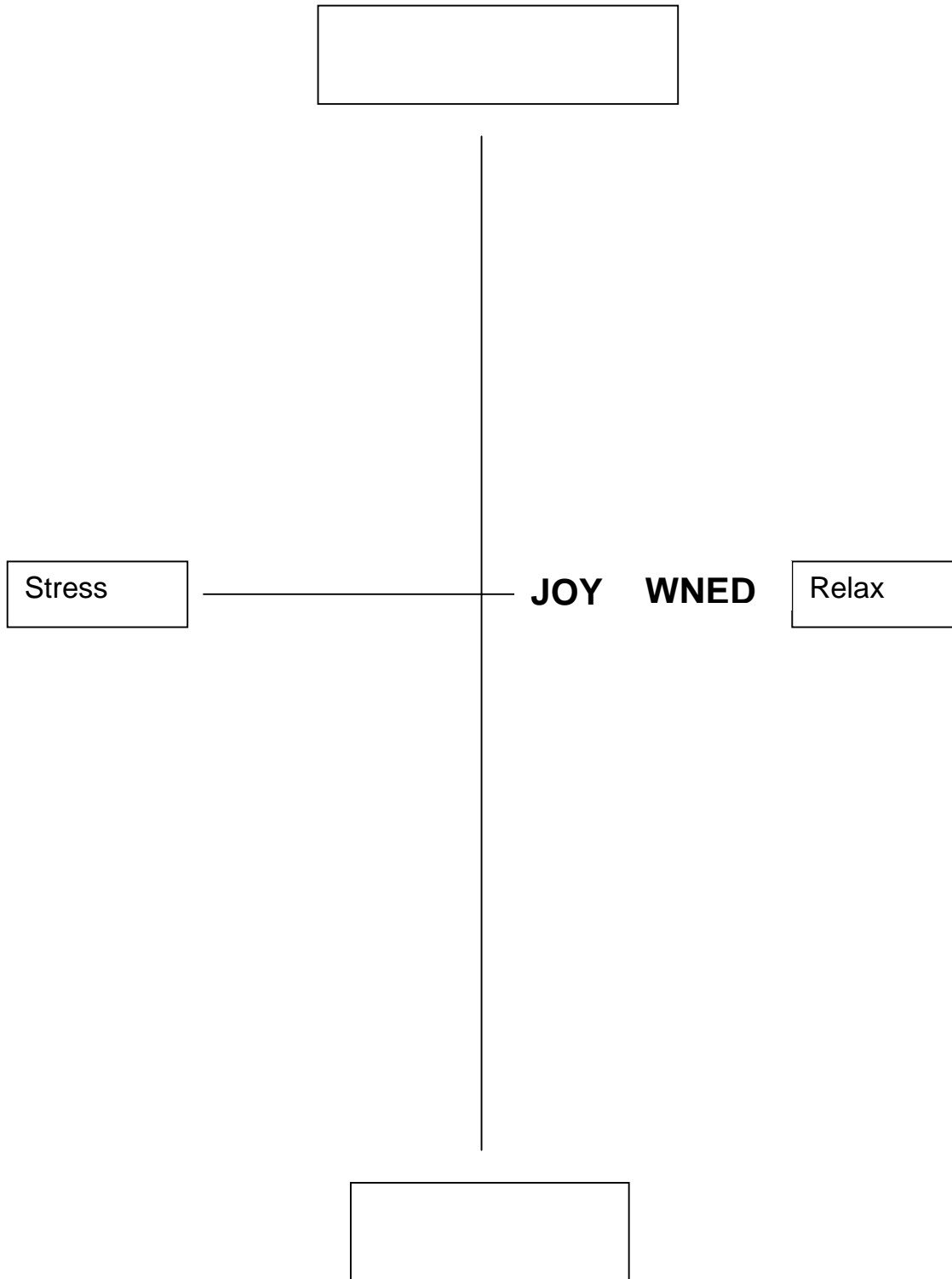
Following the top of mind exercise, the moderator went to the easel to locate the relative positioning of stations.

Positioning happens in the mind of the consumer. Radio listeners have a map of the market in their head. For example, the rock stations they know may be arranged on a dimension of hard to soft.

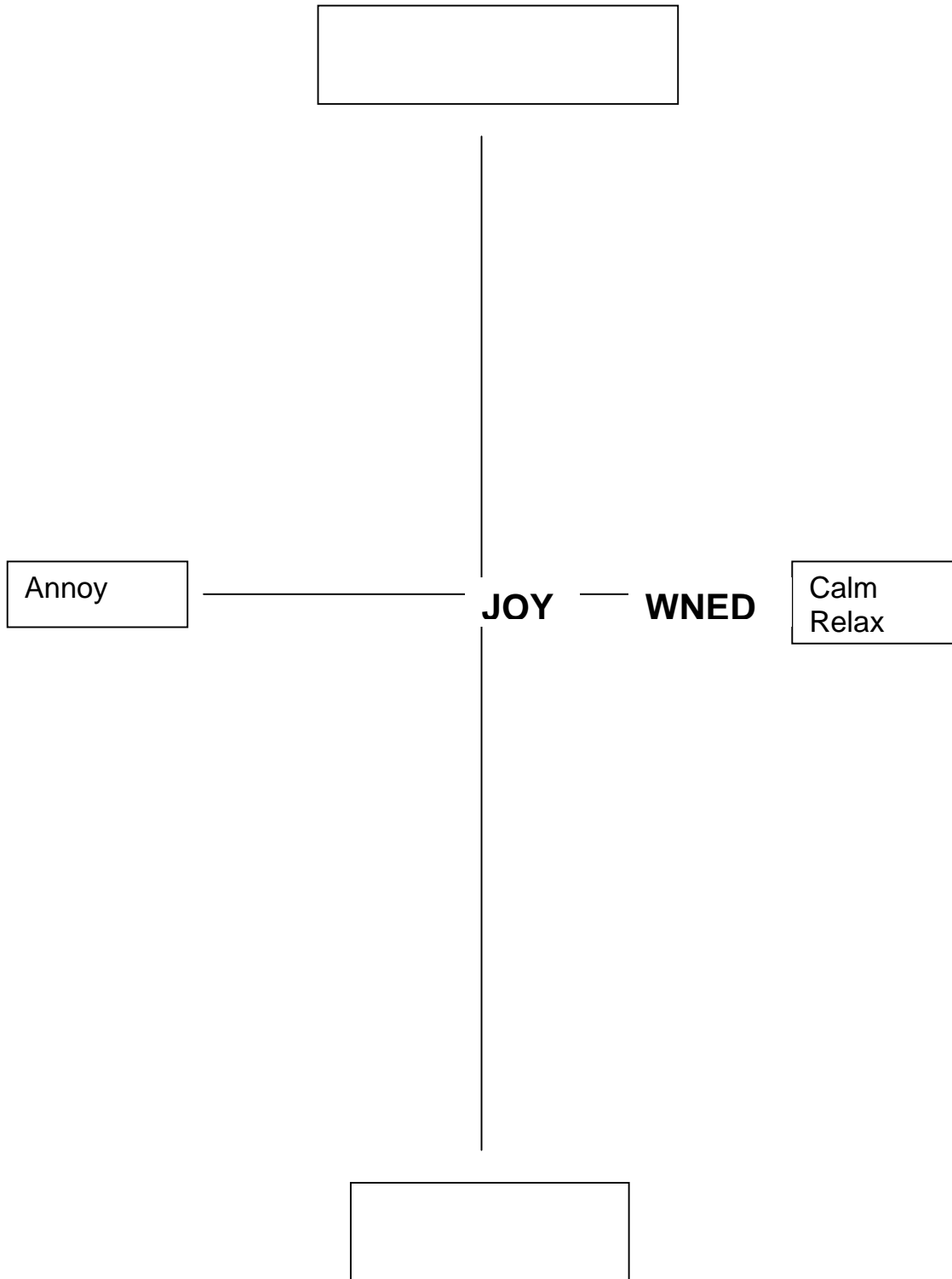
The following pages show how certain groups of respondents visualized the positioning of classical stations relative to the competition. We did not conduct this exercise in every group.



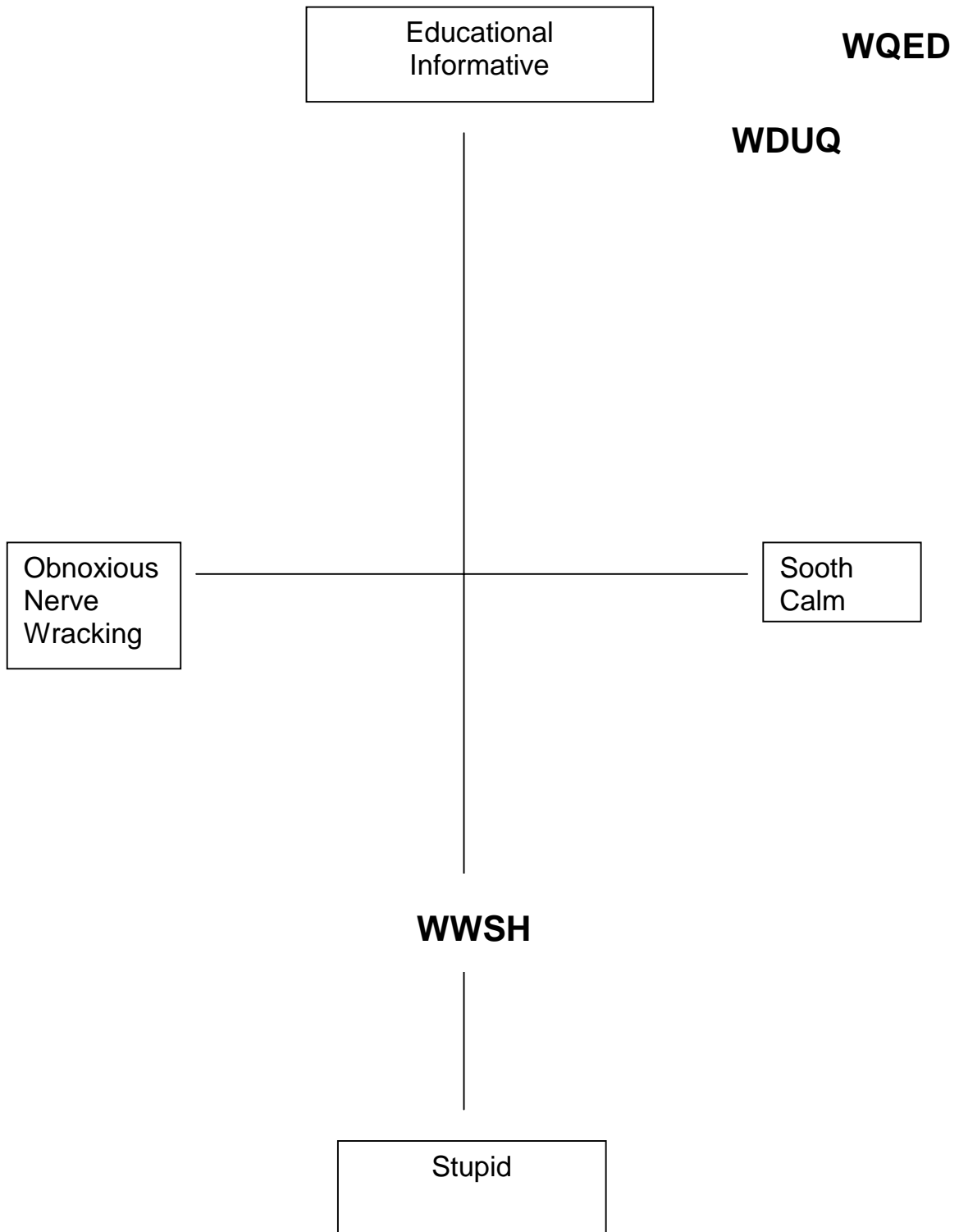
PHOENIX MEN



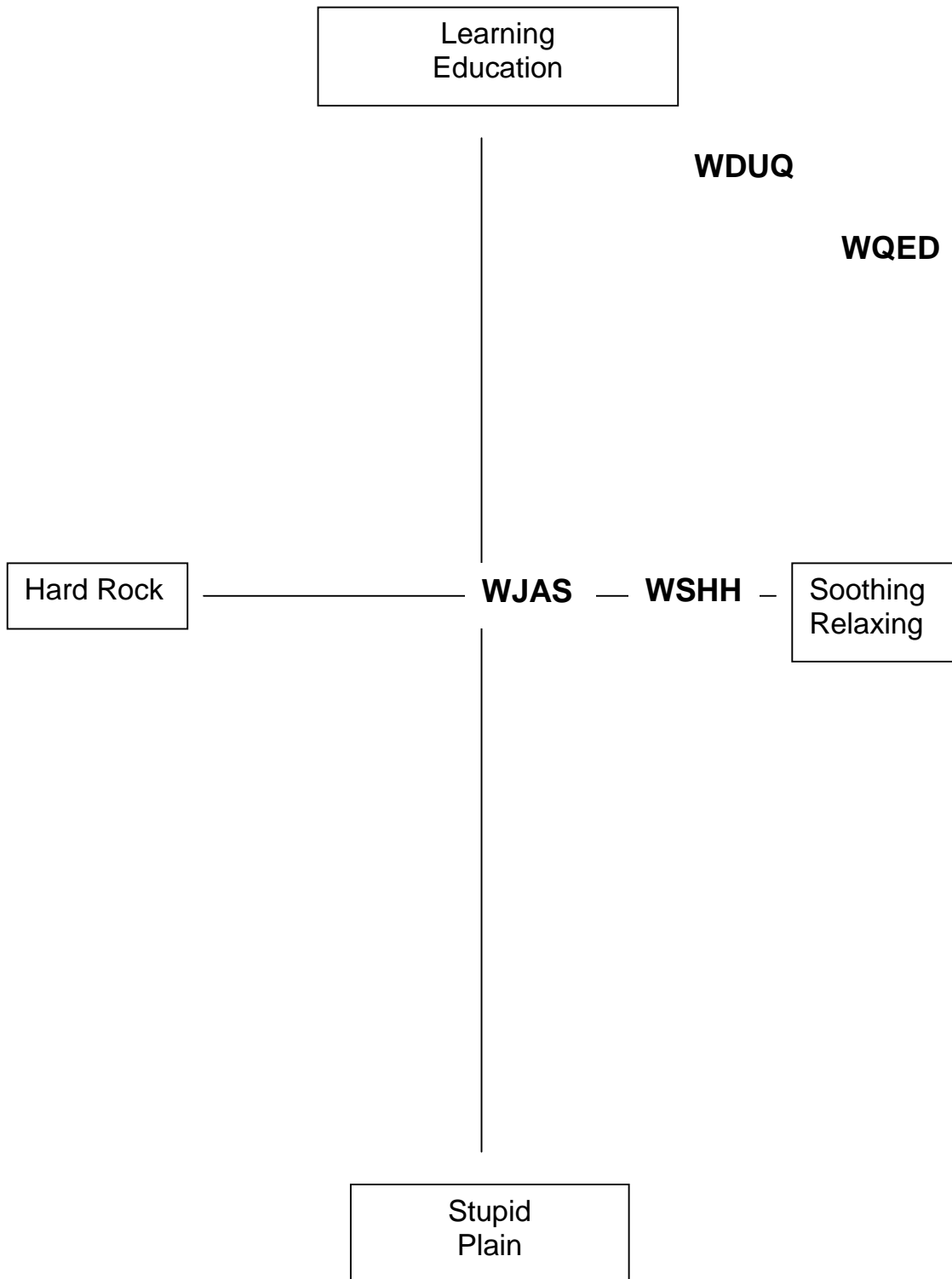
Buffalo Women



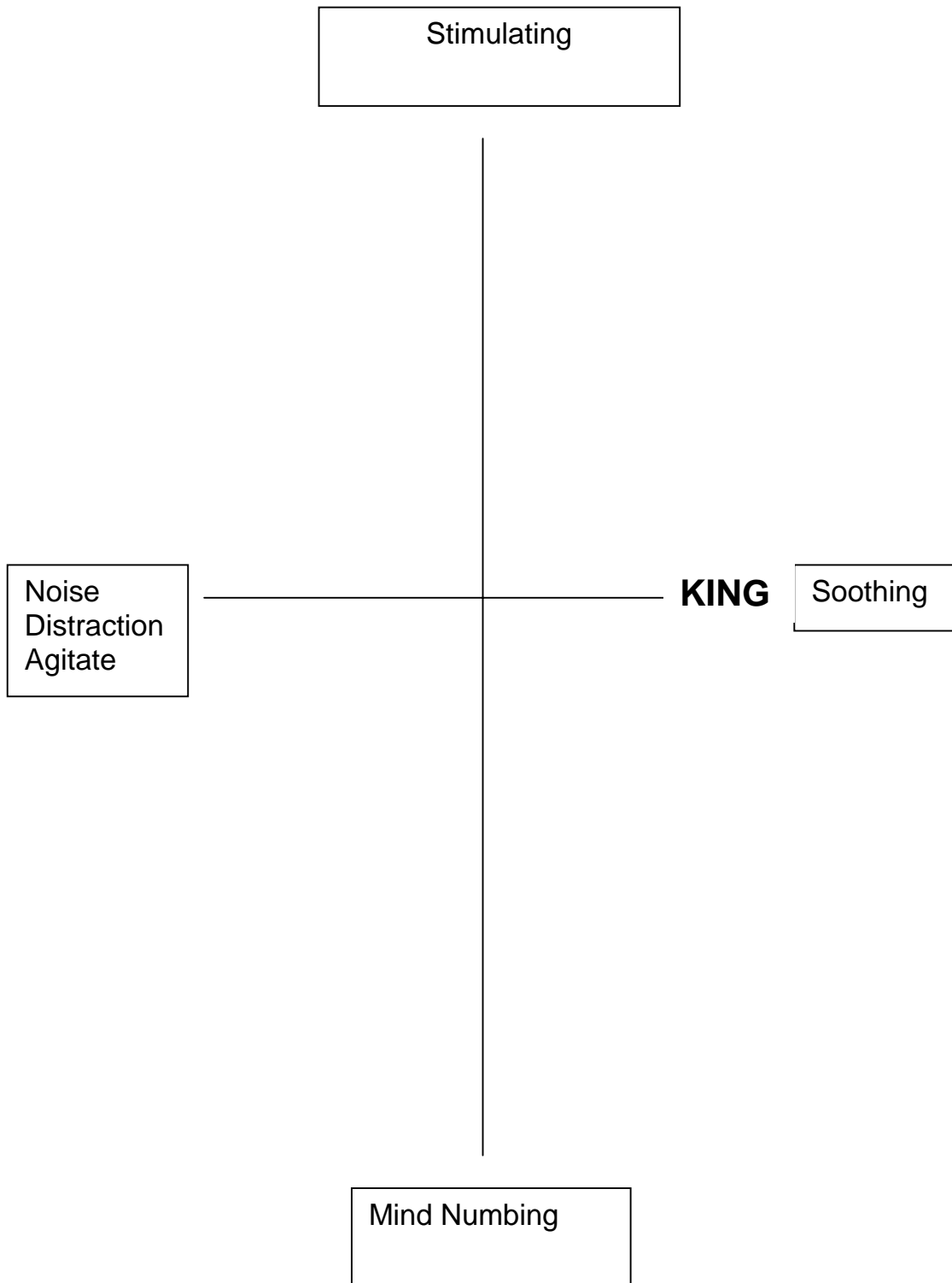
Buffalo Men



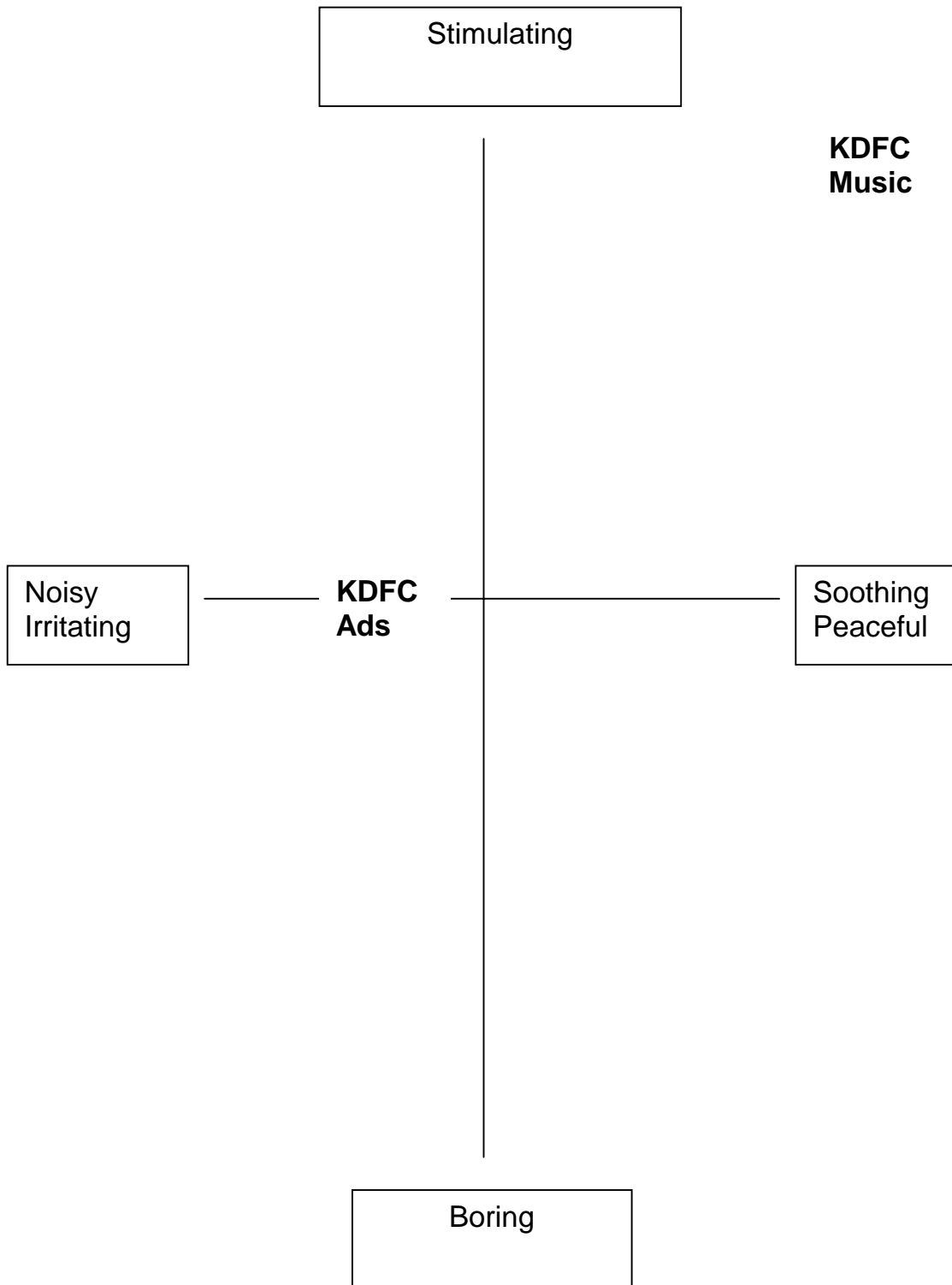
Pittsburgh Women



Pittsburgh Men



Seattle Men



San Francisco Women

Interpretation

We found that similar dimensions of positioning arose in different markets for different classical stations.

In the charts, the primary (East/West) dimension is “soothing.”

Phoenix Men described the dimension as stress or agitation vs relaxing or calm. KBAQ was completely relaxing.

Buffalo Women used the terms stress vs relax. WNED was on the relaxing end. The soft rock station JOY was also relaxing, but not as relaxing as WNED.

Buffalo Men used the terms annoy vs calm or relax. They located WNED and JOY in the same positions as did the women.

Pittsburgh Women described the dimension as obnoxious or nerve wracking vs soothing or calm. WQED was all the way out on the soothing dimension. Soft rock WWSH was less soothing.

Note that Pittsburgh Women located WDUQ nearly as soothing as WQED. But that’s because they know WDUQ mainly for its jazz programming, not for its NPR news.

Pittsburgh Men used the terms hard rock vs soothing or relaxing, and they agreed with Pittsburgh Women.

WQED was the most soothing, then WDUQ, then WWSH.

In Seattle, KING is a commercial station. Yet Seattle Men located KING all the way on the soothing end, opposite noise or distraction.

In San Francisco, where we had an assertive delegation of NPR news fans, the women agreed to split KDFC.

Its music went all the way on the soothing or peaceful side.

But San Francisco Women located KDFC’s commercials somewhat towards the noisy or irritating side.

The obvious conclusion is that classical music delivers its primary benefit of stress relief consistently across different markets—through commercial or public station. To target listeners, the classical format is the most soothing format on their radio dial.

More Interpretation

But think a bit more about this finding.

Classical listeners are familiar with the soft rock and smooth jazz formats, yet they located those stations towards the middle of the soothing dimension. There must be something about the pop formats that annoys our target listeners.

This is curious, because we can contrast the music objectively:

Easy listening formats maintain sound levels, while classical music varies its dynamic range.

Easy listening formats maintain tempo, while classical music varies from fast to slow.

Easy listening formats maintain instrumentation, while classical music varies from solo piano to large orchestra.

Accordingly, one might think that the easy listening formats would have to be more soothing than classical. But in the focus groups our respondents explained that simply soothing is not sufficient.

The classical format is also intelligent or mentally stimulating—the second (North/South) dimension of their positioning map.

Phoenix Men described the second dimension as intelligent vs mindless. KBAQ was at the top for intelligence.

Pittsburgh Women called it educational or informative vs stupid, and they located WQED as even more educational than WDUQ.

Keep in mind that they were thinking of WDUQ's jazz.

WWSH was located way down on the stupid end.

Pittsburgh Men produced a very similar chart, although they had WDUQ a bit higher on the learning end of the second dimension.

Seattle Men called it stimulating vs mind numbing. Counter to the other groups, they located KING on the middle of that second dimension, rather than at the top.

San Francisco Women put KDFC's music towards the top of stimulating, while locating KDFC's ads towards the middle.

Thus our major conclusion:

While stress relief is the primary benefit that is valued by classical format listeners, the intelligence of the music is a necessary component.

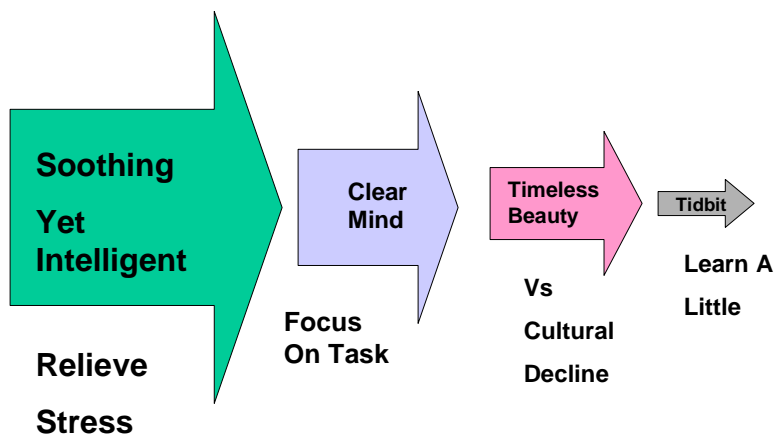
Respondents explained that classical music is intricate. Its patterns are mathematical and complex, like a creative yet orderly mind.

Use and Gratification

Listeners use a given format because it delivers gratification of their needs.

We prepared a PowerPoint slide that sums up the use and gratification of the classical music format from the perspective of target listeners.

Use and Gratification



Walrus Research

Soothing is the first and largest benefit. Yet target listeners need intelligent, mentally stimulating music to deliver the soothing effect.

Intelligent, soothing music helps to clear the mind. With a clear mind target listeners can focus on a task.

Target listeners feel that classical music preserves timeless beauty.

And it can be interesting to learn a few tidbits about the music.

Two Different Kinds of People

In this report we have made reference to two kinds of people.

The respondents who populated our Classical Core Values focus groups revealed themselves to be different from the familiar NPR profile, not only in their avoidance of NPR news but also in their orientation towards life.

We prepared a slide that contrasts two ideal psychographic types.

Classical Monks vs NPR Activists

- Escape Problems
- Internal State
- Minimal Talk
- Just the Facts
- Dream World
- Closed Exclusive
- Beauty Emotion
- Seeking Serenity
- Solve Problems
- External Relations
- Discourse Debate
- In Depth
- Confront Reality
- Open Inclusive
- Reason Logic
- Political Action

Walrus Research

This year the classical respondents told us that the world was definitely in a horrible mess, which is why they used music to escape to a cloistered monastery of the mind.

In last year's Core Values of Local Information groups we heard respondents say that the NPR station cares about solving problems.

Classical Monks use the music format to attain an internal state, soothing and calm, intensely personal.

NPR Activists use information from NPR news to guide their relations with other people in their community and around the globe.

Over and over again, classical respondents said they wanted less talk—just the minimum of information about the music.

NPR Activists love analysis and debate. More talk is better, if that talk informs their understanding of global issues.

When classical listeners hear radio news they want just the facts.

In depth is the key attribute of NPR news.

Classical listeners enter a dream world with images of paradise.

The NPR newsmagazines keep reminding us of the real world, with its social conditions, environmental changes and economic forces.

Classical listeners find little value in other music formats.

NPR fans are open to musical experiences ranging from Celtic to Afro. If there's an AAA station in town, it attracts NPR news fans.

Classical Monks seek an emotion derived from the aesthetic.

NPR Activists think that reason and logic, on the basis of solid information, can lead to the perfection of mankind.

The classical listener values lone serenity.

NPR fans are the most politically active segment of the population.

Notes from an Observer

After the last focus group in San Francisco, the Core Values team gathered for a discussion of what we had learned.

One observer wrote a memo that summed up our findings. Here are some excerpts of that summary memo:

The classical audience is distinctly different than the NPR news audience.

The portal to NPR news is through the intellect. The portal to classical music is emotional.

The terms “soothing” and “relaxing” describe the overall classical music experience as compared to what they experience in their jobs and in their lives.

The clear values articulated are:

- Soothing, relaxing + intelligent
- Clarity of mind
- Aesthetic beauty—enduring, timelessness

Their city would be diminished (even humiliated) if it did not have a classical station.

Listeners do not find public radio stations to be a major advantage over having a commercial classical station in the market.

Anything that breaks the mood is an intrusion for them including (but not limited to):

- Different voices appearing within a break
- Having the announcer talk over the music
- Too much information
- Information not delivered concisely
- Commentary that does not focus on the music

Method in Brief

We conducted twelve focus groups across six markets. We recruited women at 6pm and men at 8pm.

Respondents listened to a full time classical station as their primary or secondary station for music.

Here is the wording of the qualification questions:

*When you listen to radio at home, at work or in the car, which radio station do you listen to most often **for MUSIC?***

[DO NOT READ – UNAIDED RESPONSE]

Quotas

We specified the following quotas (non-intersecting) in each market:

30 Women
30 Men

30 Client List
30 Database

30 25 to 49 years old
30 50 to 69 years old