



Good news about the splintered TV audience

What you are about to read may sound familiar—like the strategy in public radio, with its emphasis on serving a core audience—but it’s an evolution in the thinking of the LeRois, prominent audience consultants for public TV stations and co-directors of TRAC Media Services.

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By David LeRoy and Judith LeRoy

Public television’s cume fell below 50 percent in the 2001-02 season. The portion of the viewing public that samples it in a week—as high as 59.2 percent in 1991—was down to 47.8 percent a decade later. Fewer and fewer homes are sampling public television’s fare and they’re viewing it less. When cumes and gross rating points decline, stations can lose membership and support. This could portend a vicious downward spiral.

We can’t do much about fragmentation of TV audiences. The number of channels competing for viewers continues to grow. But there is reason to believe that if public television sharpens its focus on core viewers and members and evolves a different strategy of programming and scheduling, it may be able to avert further consequences and turn back the tide of erosion.

How we got here

Audience fragmentation is the usual reason given for shrinking audiences of individual TV channels. Given more choices, some viewers will choose to switch channels. Since approximately 85 percent of U.S. homes receive TV through cable or satellite, just about everybody has more channels to choose from these days.

Fragmentation of the U.S. viewing audience began when a fourth commercial station brought syndicated fare and old movies to town in the 1950s, but it

drastically altered the programming landscape in the 1970s as small but loyal audiences made specialty channels economically viable on cable.

As more channels became available (fragmentation), the content of the new channels became more differentiated (polarization). Polarized audiences for specialty channels may be small, but are passionately committed to the programming and loyal, and hence content-partisan. Before cable and satellites reduced distribution costs, channels with such limited appeal would not have survived.

With polarization and small partisan audiences, the channels achieve far lower come-to-rating ratios than general-audience broadcasters. Every program service courts the same two demons: come and average quarter hour rating (AQH). Many people in a week's audience of a daily program will not watch every day; many who Nielsen finds in an hour's audience will not watch the entire show. For some network and sports-channel programming, the come-to-rating ratios can be 4-to-1: To have one person viewing in an average quarter hour, it must have four people cycling through that program's come.

For public television, those ratios are low. For example, during *Antiques Roadshow*, two-thirds of its audience views the whole program, for a 3-to-2 ratio.

Most public television audiences behave like the polarization-induced Fox Cable News or CNBC partisan audiences, which also display low ratios.

Partisan viewers are core viewers

With the rise of the specialty channels, we can begin to study these partisan, committed core viewers and determine what differentiates them from casual viewers. In extensive interviewing, we have come to know these people. They often arrive carrying books — they're readers.

Here are some other things we know about public television's core viewers:

- **They “get it.”** They know that the formats and narrative arcs of public television programming are different from commercial programming, and they cherish the difference. They even tell you when they “got it” that public television is different—an epiphany.
- **Unlike light viewers they tune in to the channel with the expectation that they'll find something of interest**, even if they don't know exactly what's on. Light viewers may tune for particular programs or dayparts (like the weekend how-tos) or surf in.
- **Public television's narrative voice and textural density appeals to them.** They immerse themselves in the content like someone taking a hot bath—it satisfies many needs. They are loyal to public broadcasting content and seek it out on other public television stations—even on cable.

- **They want variety and different genres through the night.** Despite very different genres, core viewers will stick with the schedule.
- **They have, in every sense of the term, a relationship with the station and its programming.** Many are members. If they aren't, a lot of them have been members and could come back. In fact, core viewers are convenient stand-ins to indicate how members would react to programs.
- **But core viewers also find there are “too many repeats.”** They watch most genres and monitor the station all the time, even during pledge.
- **Some are mad at the station because of current pledge practices; others just ignore pledge.** (Pledge deserves its own polemic).

Fans of specialty cable channels resemble public television core viewers in a number of ways: They're loyal, they sample frequently and they're committed to content and the channel's narrative voice. They know when a program “does not belong on here,” most often because the errant program lacks the narrative voice they have come to expect and respect.

However, the core values associated with public television programming are not the same as those associated with Fox, Trinity Broadcasting Network, Discovery or A&E. (We discuss public television's core values at great length elsewhere—see the papers on our website, www.tracmedia.com.)

With core viewers like these, how should we schedule our channels? To answer this, let's introduce the notion of experiential scheduling.

Can multicasting help?

Some public broadcasters are placing hope in digital TV technology that will allow them to multicast several streams of programs at once.

So far, we see no evidence this will help stations maintain a broader cume. We don't see where public TV would find the substantial funds to pay for development of new services with distinctly different appeals any time soon. The barrier to success would be high: New services would have to be attractive enough to support themselves in a crowded program environment.

It is more likely that additional channels will simply improve service to our core audience by providing convenient repeats and programs similar to the NPS. And that could be a good thing if it adds to the variety of programming and yields more satisfied core viewers and members.

What member-centric TV should look like

Core viewers — and station members — watch public television differently from light or occasional viewers. Let's think about what core viewers and members

expect from the schedule and often do not get. We argue that this may be helping to erode our audience.

Core viewers want to be engrossed viewers who immerse themselves in the programming. When they tune in, they hope to find something that will pique their interests.

They say coming to the channel is like having a conversation with a friend. When you meet a friend, you want to have a good time talking and being together. You don't go to visit your friend to discuss Topic A and then leave immediately — you usually go on to chat about Topics B, C and D.

In member-centric scheduling, some of our old concepts no longer serve our purposes.

Many of the scheduling practices in public television today are mechanical, if not Victorian, in concept and execution. We need to rethink the priority we give to audience flow and stacking of similar programs within an evening.

The mechanical view of scheduling is to put all the yellow boxcars together and all the red oil tankers together. That is, we stack a few science programs on a weeknight, some public affairs on Friday and some Britcoms on a Saturday night. The mechanic's criterion is that the programs belong together because they're all boxcars and the viewer interested in one boxcar will stay tuned for the whole batch.

At its extreme, cable specialty channels do this with long blocks of cooking or home decorating programs. What the programmers fear is that stacking different programs will cause churn — an audience exodus when the next program is too different.

But core viewers want variety in their viewing experience. They often get bored with hours of similar programs. But do they want to leave? Absolutely not.

What core viewers want is captured in the concept of program affinity. That is, programs of different genres and about different topics can share the same viewers if they deliver the satisfying experience that audience expects. The programs can be as different as *Nova*, *American Experience*, *Frontline* and *The NewsHour*. Affinity is: variety without churn.

The experiential approach to scheduling is difficult because the programmer has to understand whether programs will appeal to the audience and how much affinity the programs share. The programmer focuses on core viewers or members and aims to craft a satisfying evening's experience for them — much the way a great chef assembles the menu each night for a great dining experience. It's much easier to mechanically stack similar programs—one merely has to be able to read the label.

We've talked about what core viewers and members want and expect because it may help explain part of the last decade's public television viewing erosion and economic support shifts.

The lost viewers of public television

We are seeing the core viewer more clearly now that others have left the scene.

Who are ones we've lost? We know of no publicly available field studies of the people who've left public TV's cume in the past decade. Some studies have stumbled on "lost viewers" in the pursuit of other research questions, and there are local and national rating data that suggest possible explanations.

But rating data, by their very nature, deal with the aggregate and do not explore motives of particular people. So what follows is informed conjecture at best.

It appears the viewers public television has lost are what we call the butterflies—light and irregular viewers who show up only in the monthly/28-day cume. When these people got more viewing choices, they left our cume.

They didn't "get" public television. Many found our programs to be boring, uninteresting or "too intellectual." They discovered other programs they liked better on the new channels. There's little chance that we would get them back since they are wanderers by nature—seeking stimulation rather than edification. They were not core viewers and were not likely to become members.

Viewers we don't have to lose

We're seeing erosion in a number of areas in the schedule, including some losses that do not have to happen.

Primetime: The performance of the NPS schedule has been the focus of much concern and some research, lately by CPB.

We see two major unanswered questions about the NPS. One is how much erosion is caused by dilapidated programming strands. We'll leave that question for PBS and CPB to resolve.

The other question is how much erosion is caused by systemic factors such as common carriage, too many repeats, or long pledge drives. We know stations already have lost many members because they are angry at the number of repeats and at pledge drives aimed at entirely different people.

Daytime: Although it varies by station, cume have lost more ground in daytime than in primetime. That is essentially an unnecessary mission-inflicted loss of cume, since most stations devote so many daytime hours to children. We do not



disagree with the mission of Ready to Learn or the focus on children's programming. The problem is that scheduling kiddie shows all day drives away core-viewing adults and members during the early afternoon and some early fringe timeslots.

How many hours of children's programming is too much? As Falstaff observed, it is our excesses that will be our undoing. More is not better. Peter Frid, general manager of New Hampshire PTV, tells the story of being home with the flu. He wanted to watch public television, but each of the three available public television stations was telecasting the same children's programming!

Within the guidelines of Ready to Learn some stations have begun to serve adult audiences. Maryland PTV, for example, offers a popular Afternoon Tea-branded daypart that is an island of Britcoms, drama and *Charlie Rose* dropped in among the children's programs in the early afternoon.

Weekends: Cable specialty channels cut into our weekend audience early in the '90s. Stations have the prerogative to to improve weekend dayparts and we believe they have a chance to regrow the audience there.

It is, perhaps, merely coincidence that primetime household cumes began to decline with PBS's institution of common carriage.

Before common carriage, for example, Philadelphia's WHYY carried *Nature* on Thursdays at 8 p.m. and generally had a 3 or 4 rating. When common carriage moved the show to Sunday, ratings declined to 1 and have never fully recovered. Before common carriage, astute stations had schedules that maximized the local audiences for NPS series. As we have noted recently, secondary stations that do not follow common carriage have narrowed the rating gap with the primary stations in several markets.

Common carriage is a rational bureaucratic decision prompted by national underwriters' needs. But it's always good to remember that there are costs associated with any national programming decision. One hopes that the positives outweigh the negatives in the big picture. Alas, the costs of common carriage affect some stations more dramatically than others. Stations in the Deep South and parts of the Northeast find that national NPS strands do not perform well, cutting into the national PBS cume as well as the audience and membership of those stations.

Living with polarizing audiences

In summary, public television is feeling the stress of audience fragmentation, erosion, mission-inflicted cume losses and the loss of local scheduling options. New research and evolving station strategies suggest that we can limit the

effects of fragmentation by concentrating resources on keeping the viewers we have and bringing them in as dues-paying members.

Overall, there are approximately 23.5 million U.S. households that have core-viewer characteristics. Core viewers come in various sizes and shapes — different ages, genders and backgrounds. That's a substantial number of potential public television partisans.

Maximizing gross rating points among station members is a strategy for scheduling to enhance core viewers' and members' satisfaction, and we are seeing indications that member-centric strategies work.

In Sacramento, Calif., KVIE revamped its schedule to focus more on satisfying members after very low renewal rates among long-term members told them they were facing a membership revolt. According to the station's membership director, renewal rates and rejoin rates were up after a year of such scheduling.

In a perfect world, core viewers' emotional commitment would translate into financial commitment. But this happens only if we increase the value of the service: We must recognize and enhance relationships with core viewers and members through the things we say in on-air promotions and pledge drives and the things we do, such as discontinuing mechanistic scheduling tactics.

The core viewers and members are a worthy focus — they are a group of people who, in the increasingly fragmented television world, are more likely to “be there” for us. They are people who have stuck with public television because of their taste and dedication to quality programming.

In the end, fragmentation could be a blessing if it encourages stations to focus less on scheduling and fundraising for noncore and undercommitted audiences and emphasize the mission of providing appealing programs for intelligent and curious viewers of all ages, genders, races and educational levels.