

R&R Talk Radio Seminar 2003

Top Arbitron Performers in News/Talk

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Radio Programming Services



What Is News/Talk/Information?

- **The “News/Talk/Information” formats:**
 - » Talk/Personality
 - » News/Talk
 - » All News
 - » All Sports (not included in analysis)
- **Stations selected based on their reported format to Arbitron in their Station Information Form**

What Is a Top Performer?

Criteria:

- **Scan the Continuous Measurement markets and rank the stations, based on the AQH share for programming demo**
 - » Market Rank 1-10: Station must be in Top 7
 - » Market Rank 11-50: Station must be in Top 5
 - » Market Rank 51+: Station must be in Top 3
- **Same rules used in PD Advantage[®] 4.0**
 - » Arbitron continuously measured Metros included from Spring 2002

Market: SAN FRANCISCO	Format: News/Talk
Survey: SP02	Norms Based On: SPRING 2002
Geography: Metro	Ethnic:
Target Station: KGO - AM	Language Pref:
Daypart: M-Su 6:00AM - 12:00M	

2 - How do my Vital Signs compare against National Averages and Top Performers?

	Nat Avg	KGO-AM	Top Perf	Nat Avg	KGO-AM	Top Perf	Nat Avg	KGO-AM	Top Perf
Target Demo	P12+			P35-54			P25-54		
Estimates									
Share	3.2%	6.2%	7.0%	2.8%	4.9%	6.1%	2.4%	3.8%	5.0%
TSL	7:45	8:15	8:30	7:00	6:00	8:00	7:00	5:45	7:45
Tune-Ins	5.8	6.7	6.7	5.7	6.1	6.6	5.6	5.9	6.5
Time Spent Per Tune-In	1:19	1:14	1:17	1:11	1:00	1:10	1:11	1:00	1:10
Listening Locations									
% AQH Home	51%	58%	54%	34%	34%	37%	33%	32%	35%
% AQH In-Car	33%	31%	32%	42%	46%	41%	41%	47%	41%
% AQH at Work	15%	10%	13%	23%	19%	22%	24%	20%	23%
% AQH Other	1%	1%	1%	1%	0%	1%	1%	0%	1%
P1 Information									
% P1 Cume	40%	42%	47%	36%	37%	43%	35%	36%	42%
% P1 AQH	68%	74%	76%	63%	69%	72%	62%	69%	71%
P1 TSL	13:15	14:30	14:00	11:45	11:30	13:00	12:00	11:00	12:45
100+ QHs (% of dialers)	6.1%	8.6%	7.4%	4.9%	5.0%	6.4%	4.6%	4.6%	6.2%

What Is a Top Performer?

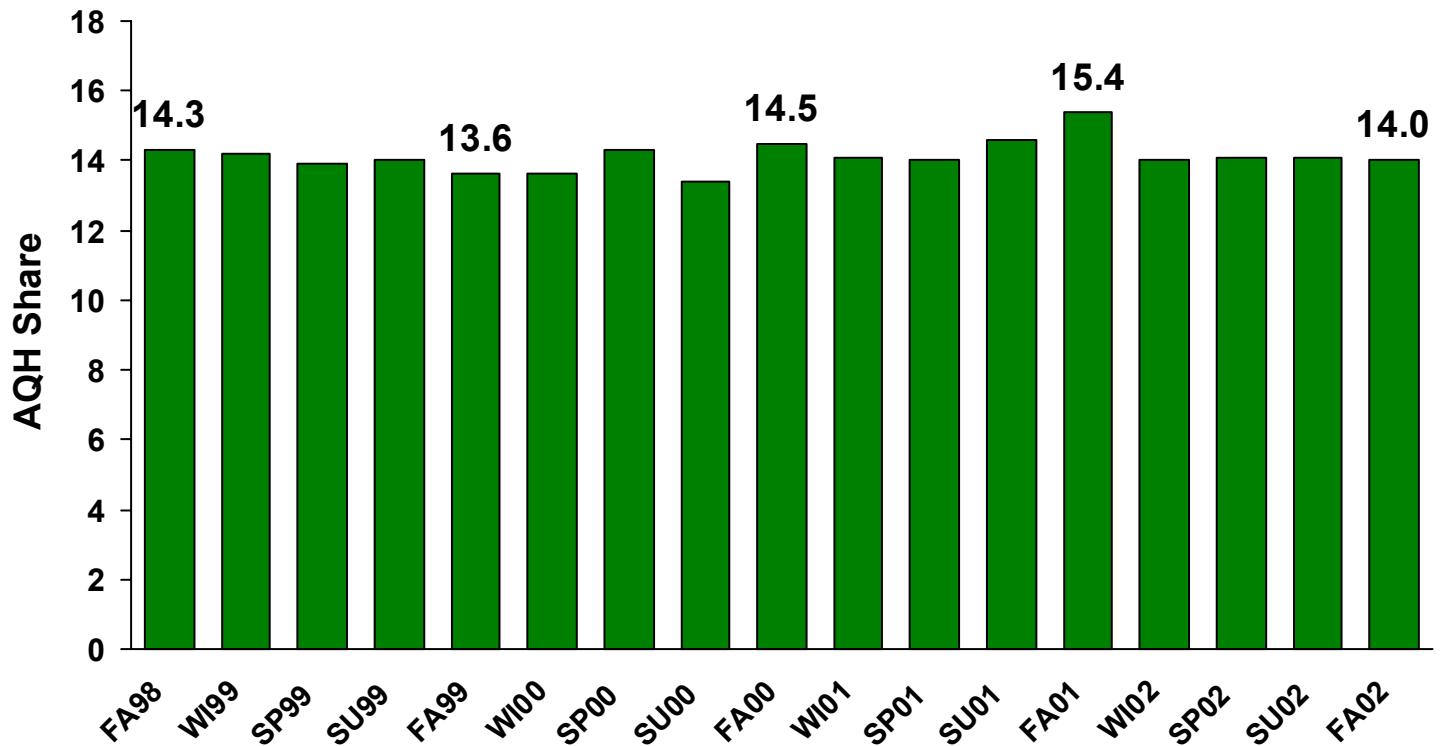
Criteria:

- **Programming Demo:**
 - » Talk/Personality – P35-44
 - » News/Talk – P35-54
 - » All News – P45-54
- **Analysis Demo:**
 - » Talk/Personality – P25-54
 - » News/Talk – P25-54 (Should be P35-64?)
 - » All News – P35-64

Comparing National Average to Top Performers

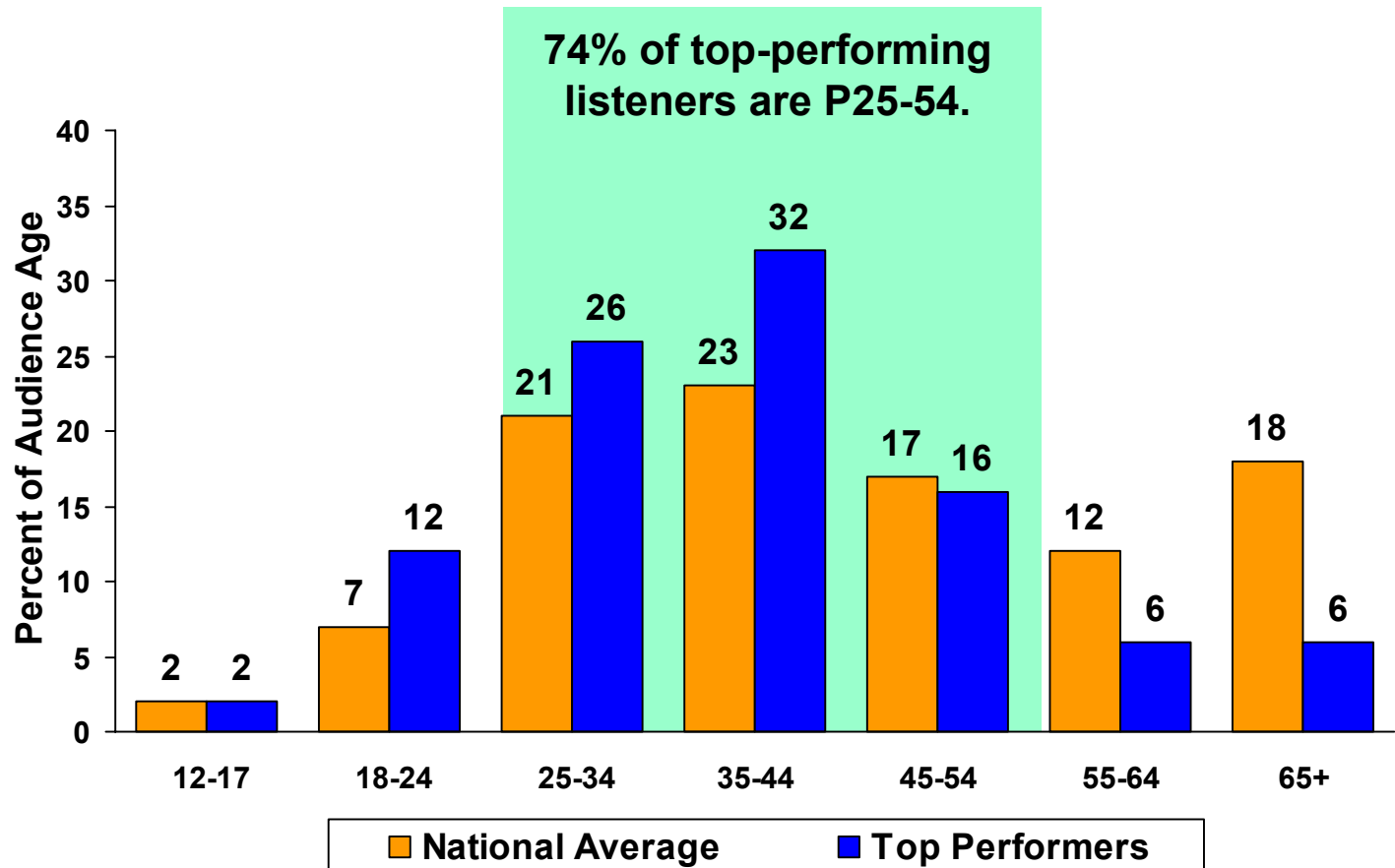
- **National Average:**
 - » Talk/Personality – 61 stations
 - » News/Talk – 210 stations
 - » All News – 16 stations
- **Top Performers:**
 - » Talk/Personality – 4 stations
 - » News/Talk – 33 stations
 - » All News – 8 stations

Nationally, News/Talk/Information Radio Listening Is Strong & Steady



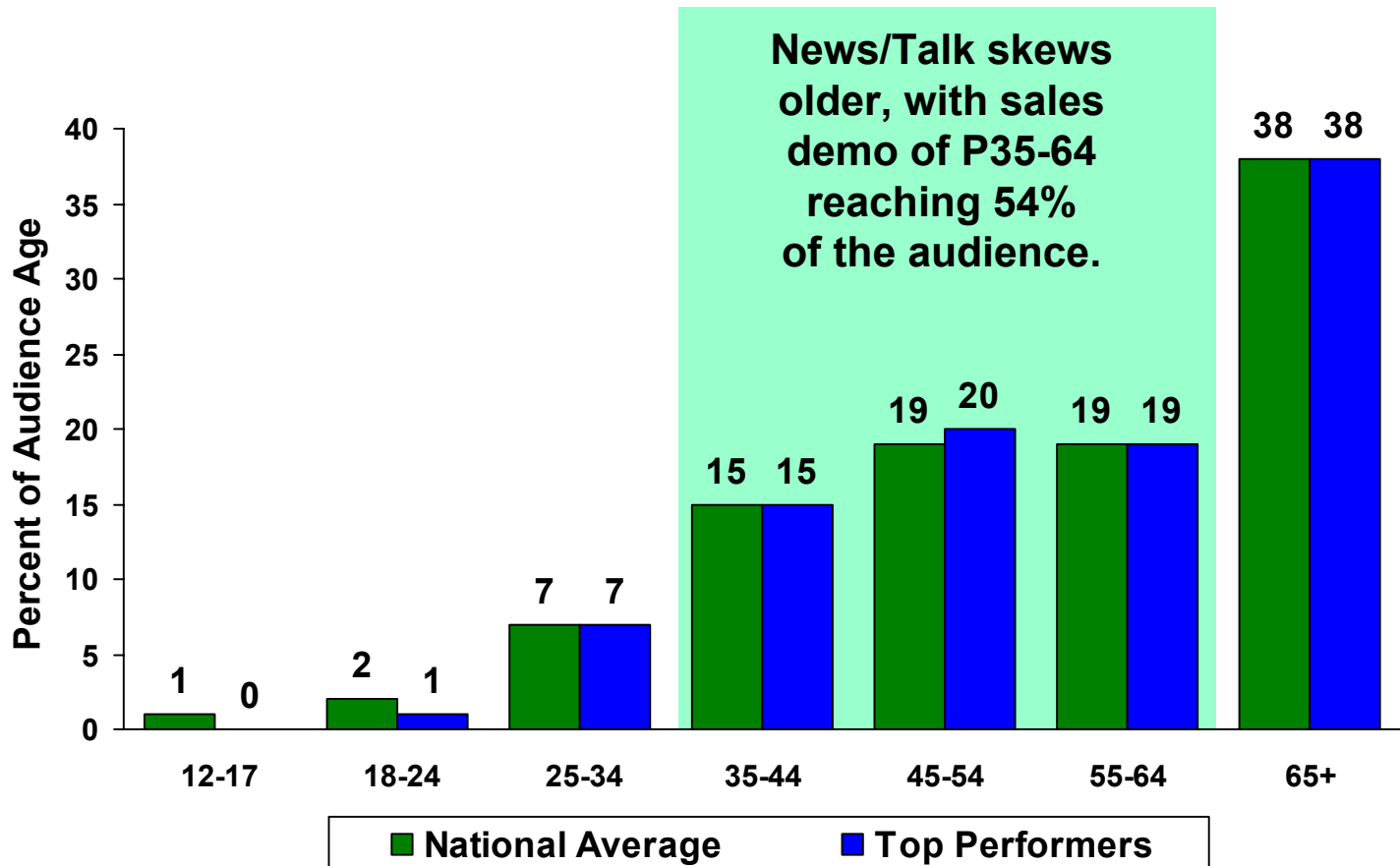
Source: *American Format Listening Trends, P12+, Mon-Sun 6A-Mid, (All News, News/Talk, Talk)*

How Do Top Performers Compare to Average in **Talk/Personality**?



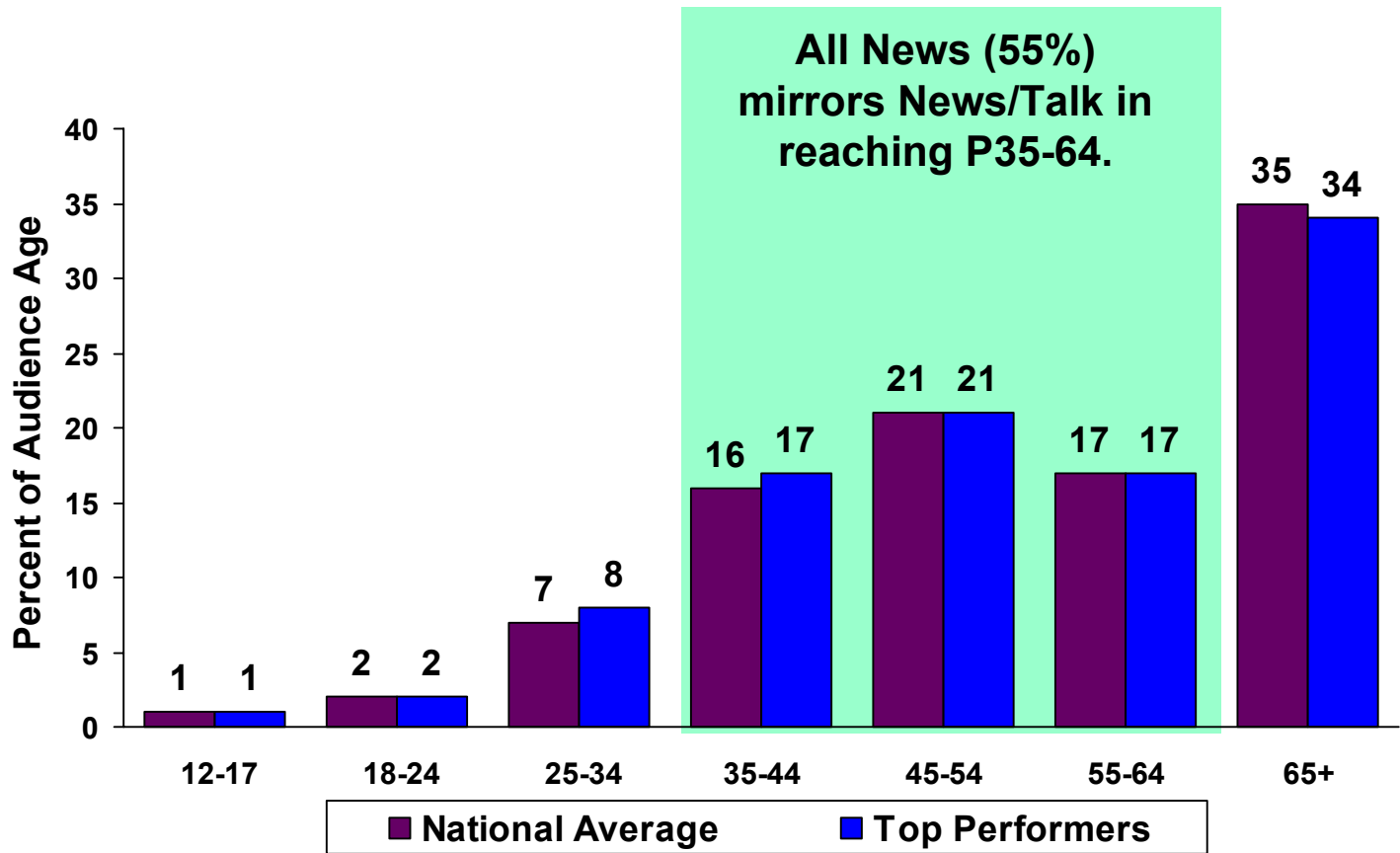
Sources: *American Format Listening Trends*, Spring 2002, P12+, Mon-Sun 6A-Mid (Talk/Personality) vs. Top Performers, PD Advantage 4.0, Spring 2002, P12+, Mon-Sun 6A-Mid

How Do Top Performers Compare to Average in **News/Talk**?



Sources: *American Format Listening Trends*, Spring 2002, P12+, Mon-Sun 6A-Mid (News/Talk), vs. Top Performers, PD Advantage 4.0, Spring 2002, P12+, Mon-Sun 6A-Mid

All News Also Skews Older



Sources: *American Format Listening Trends*, Spring 2002, P12+, Mon-Sun 6A-Mid (All News), vs. Top Performers, PD Advantage 4.0, Spring 2002, P12+, Mon-Sun 6A-Mid

What did you listen to?

How long did you listen?



$$= \text{Tune-Ins} \times \text{Time Spent Per Tune-In}$$

These two estimates combine to give you...



Marketing

- Advertising
- Direct Mail
- Events

Programming

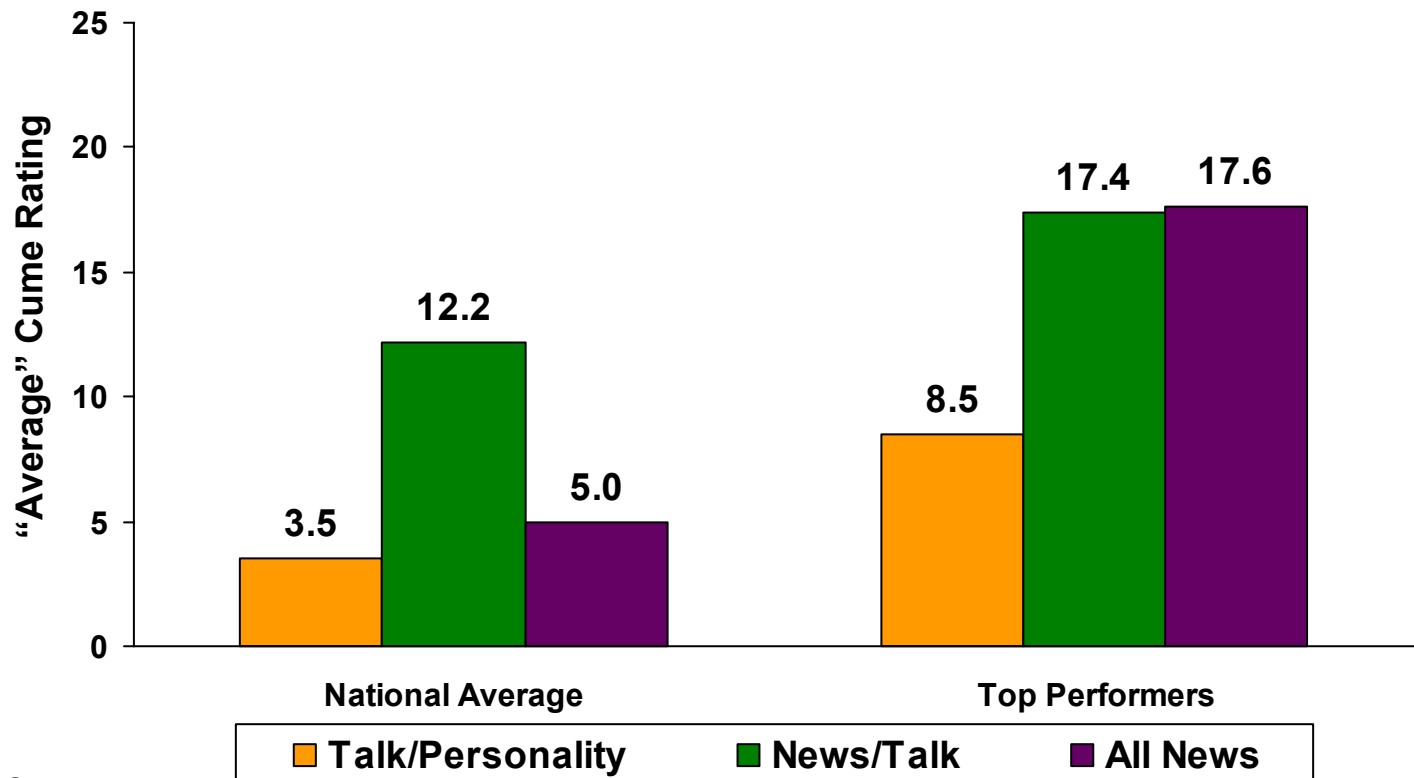
- Contests
- Compelling Content

$$\frac{\text{AQH Persons}}{\text{Population}} =$$



$$= \frac{\text{AQH Persons}}{\text{Market Total AQH Persons}}$$

It Starts with P12+ Cume! (Cume Rating)

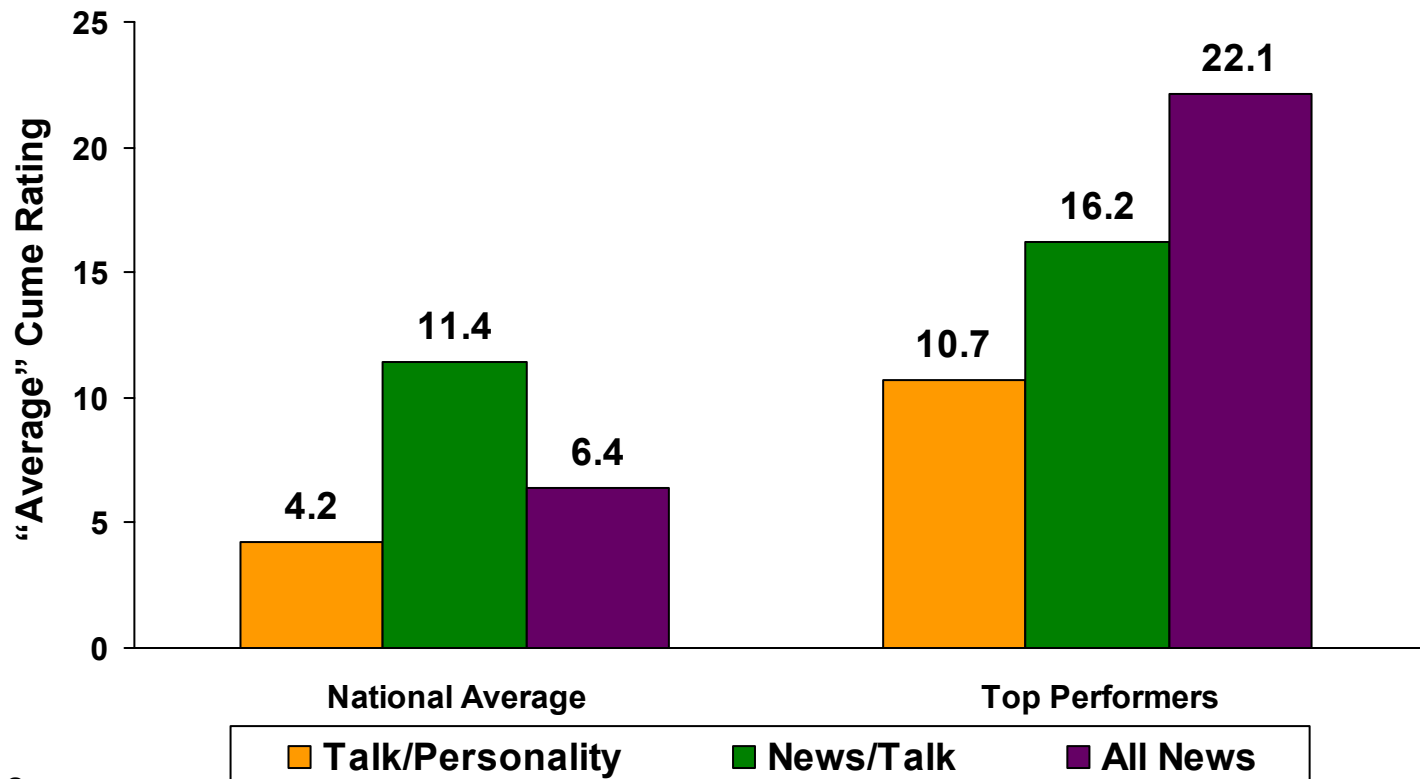


Sources:

National Average: National Regional Database, Metro Cume Rating, Spring 2002, P12+

Top Performers: Maximizer®, Spring 2002, P12+

It Continues with the Target Demo Cume!

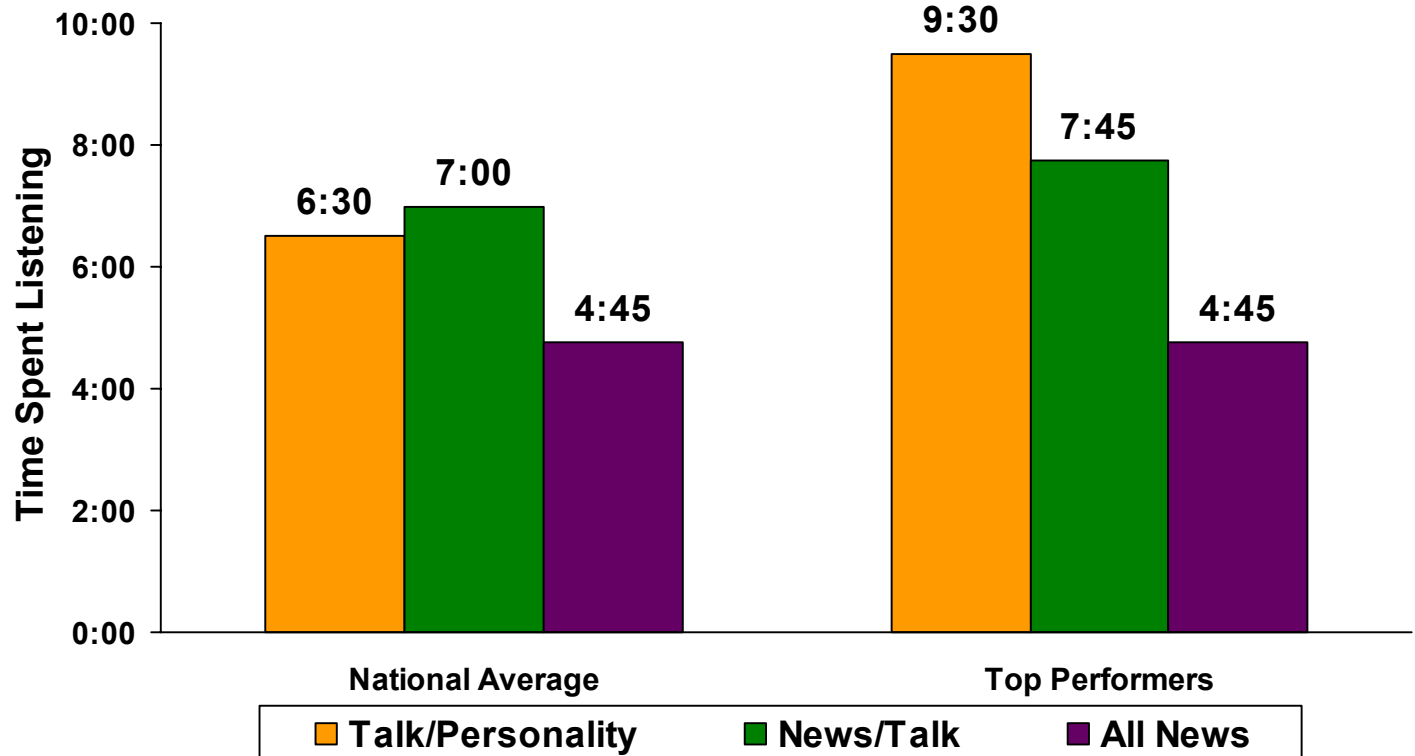


Sources:

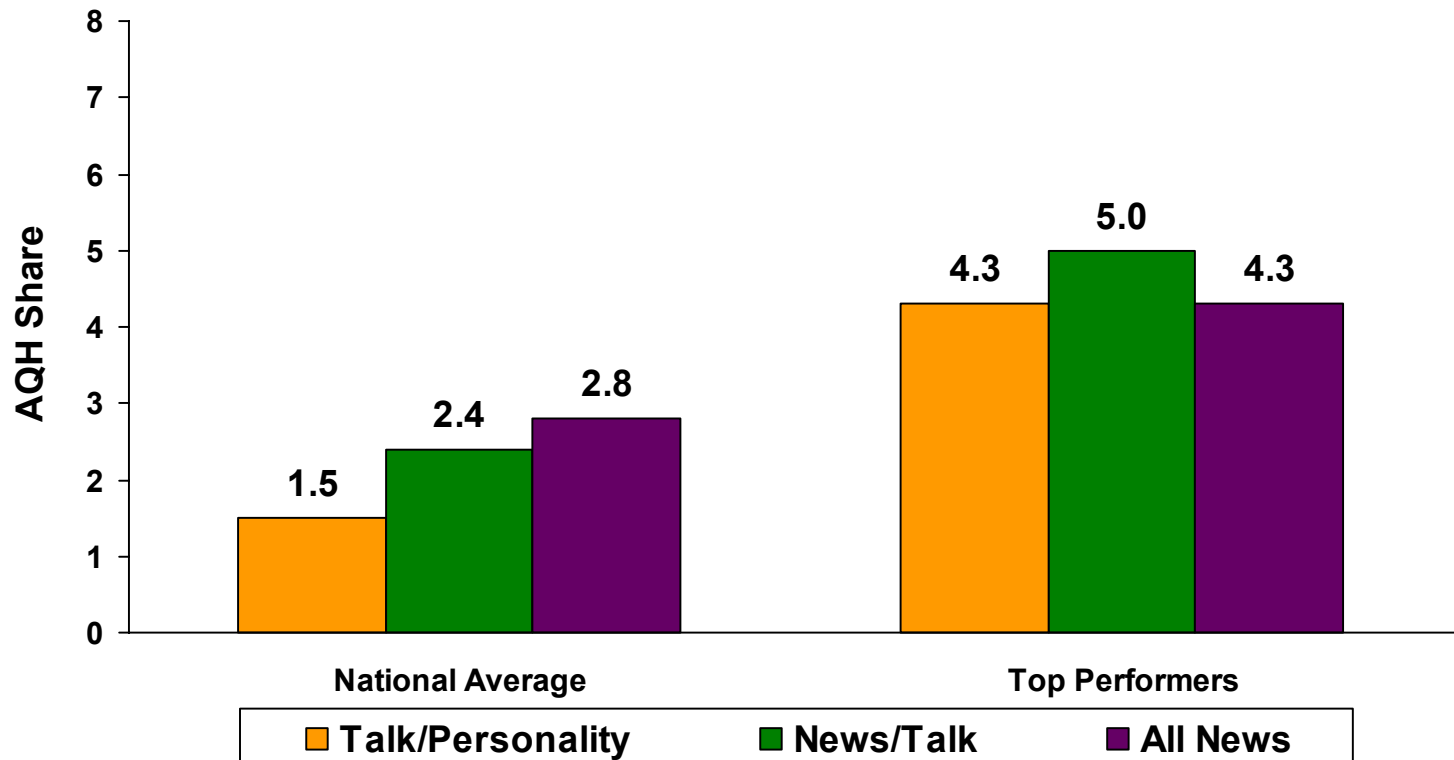
National Average: National Regional Database, Metro Cume Rating, Spring 2002

Top Performers: Maximizer®, Spring 2002, P25-54 (P35-64 for All News)

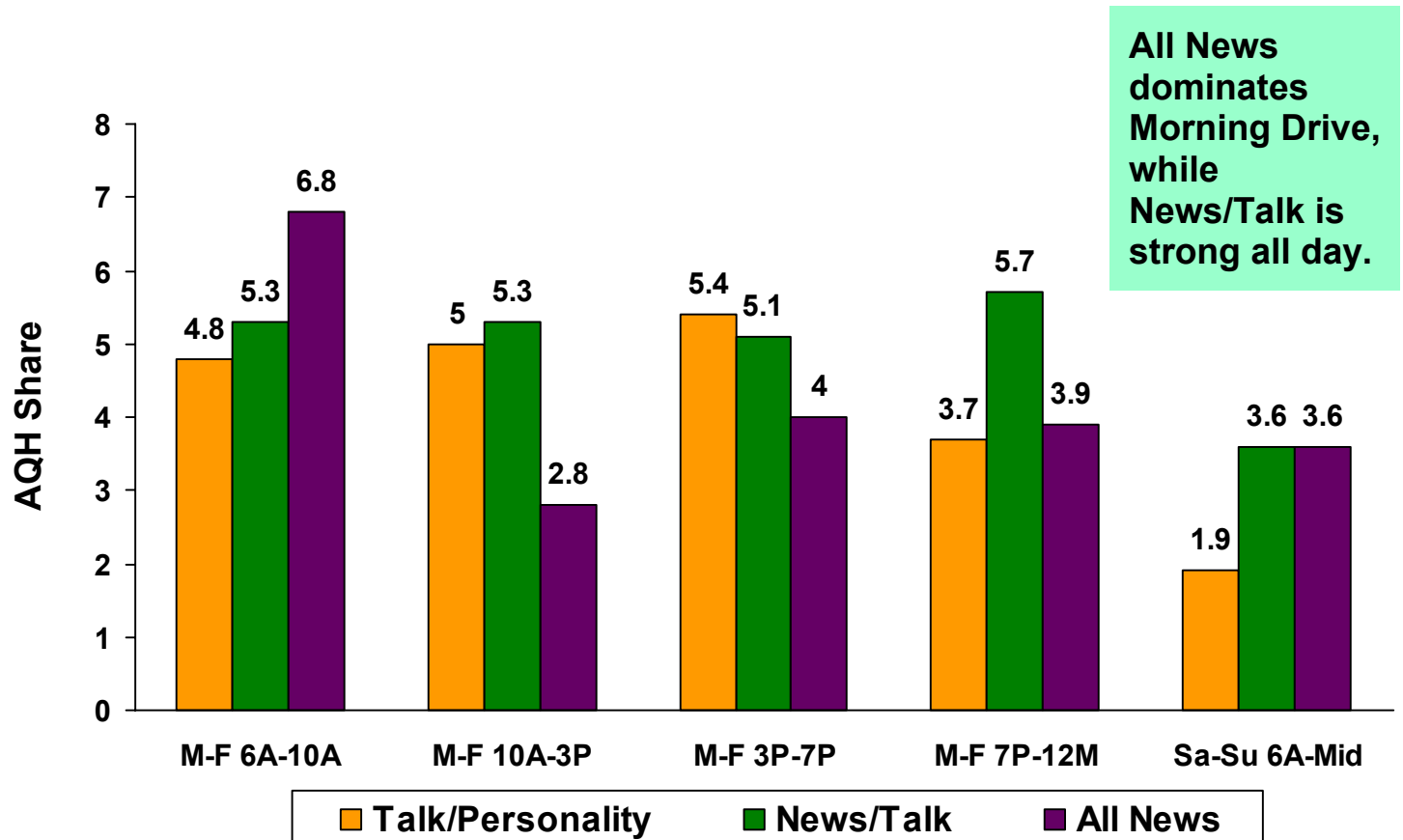
...Then, with That Cume, Build Time Spent Listening...



...to Get a Higher AQH Share in Arbitron

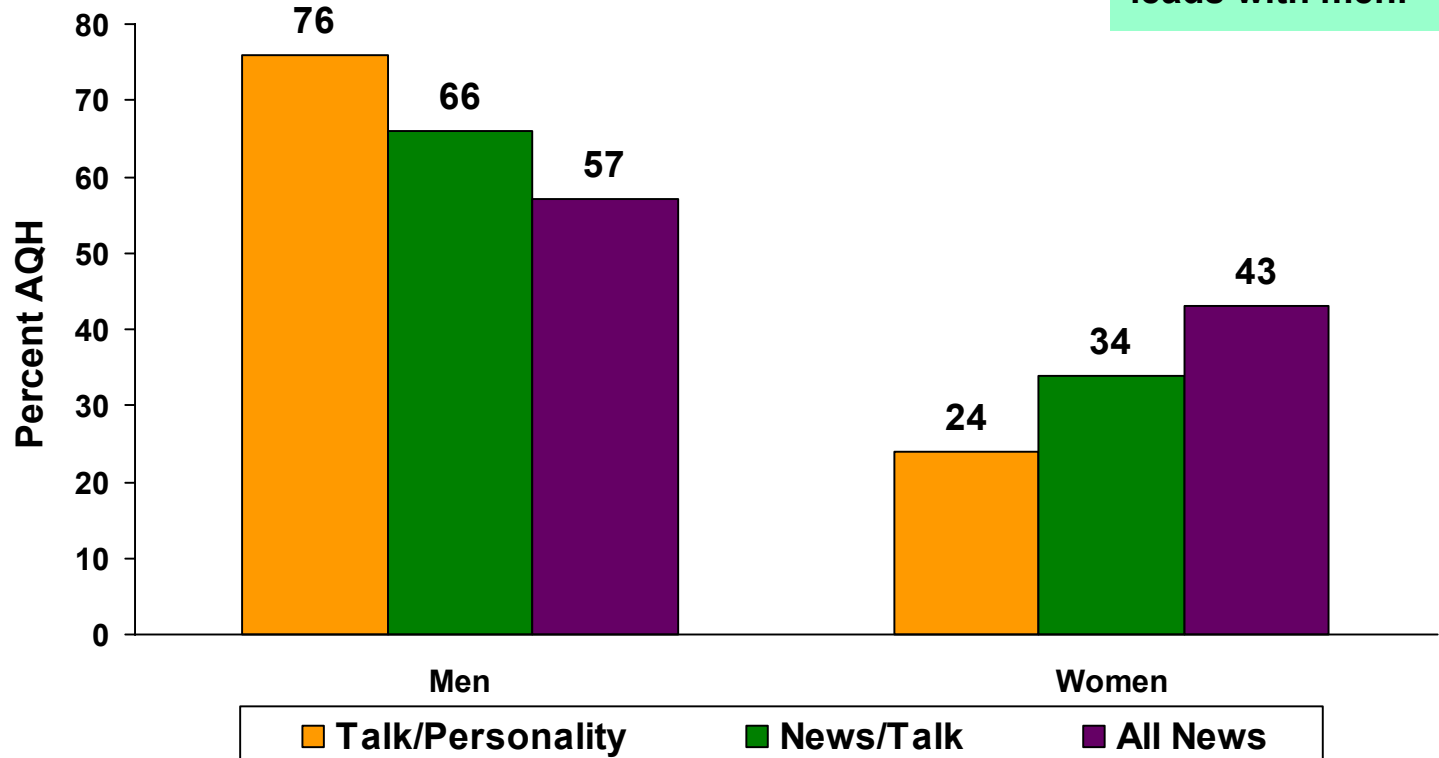


How Do Daypart Shares Differ for the Top Performers?



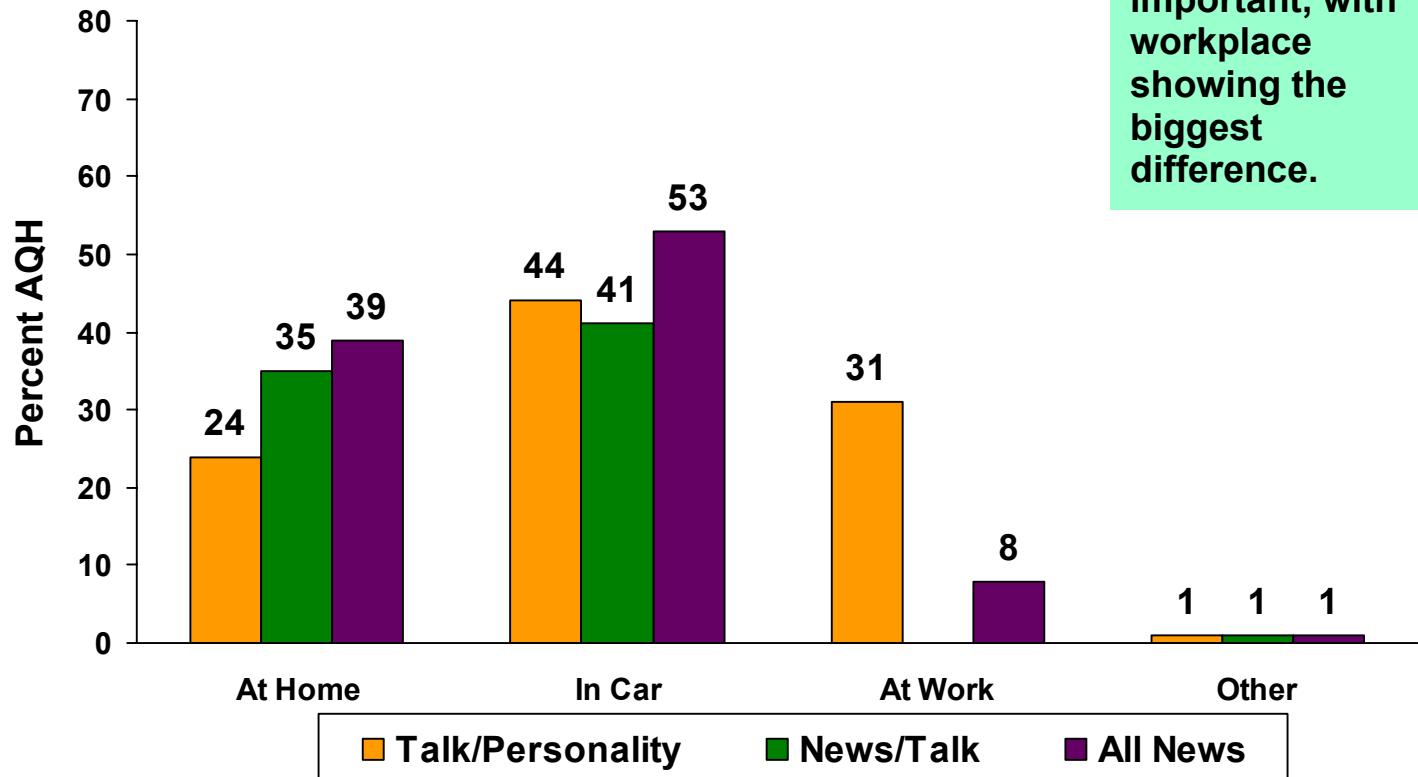
Does Gender Composition Differ?

Talk/Personality leads with men.



Does Location of Listening Matter?

Car is most important, with workplace showing the biggest difference.



What Is Behind the TSL?

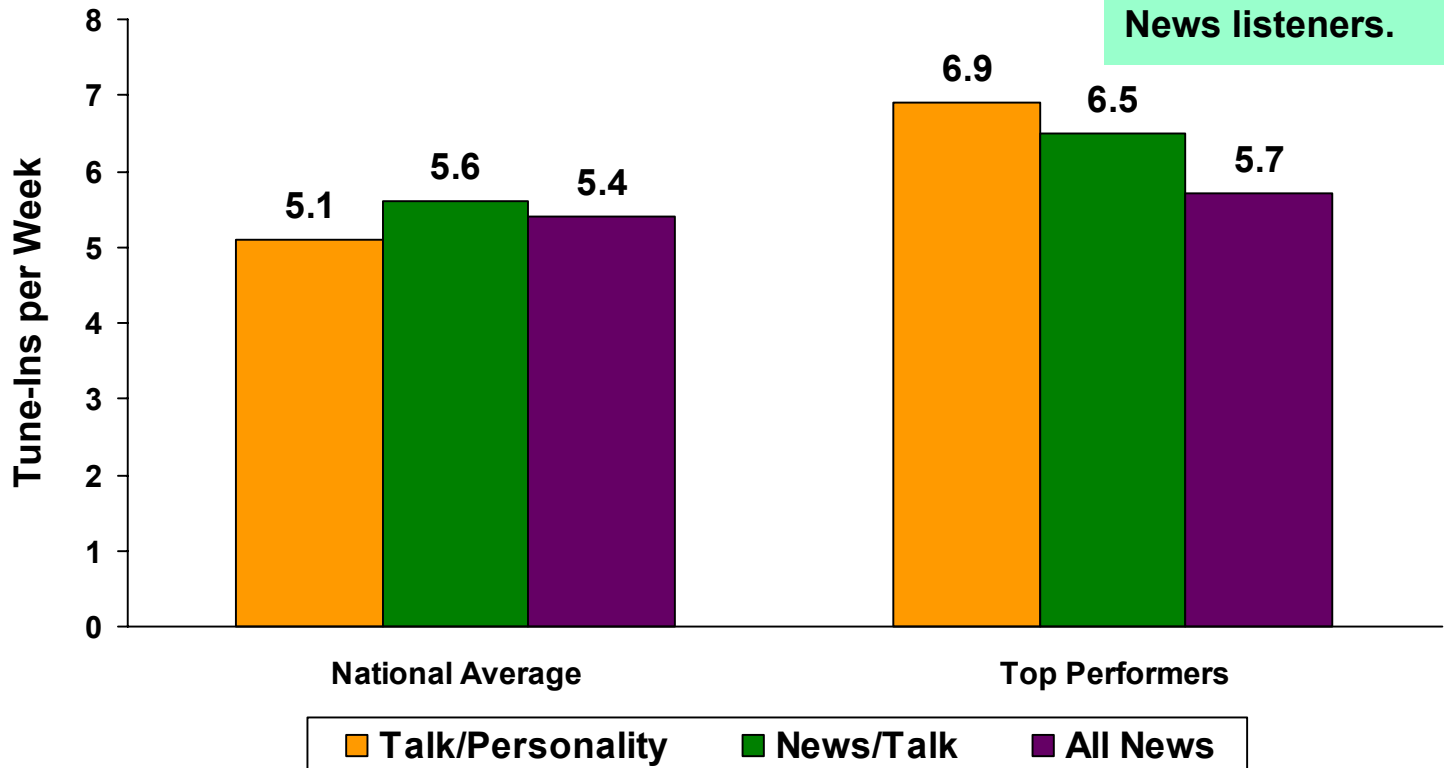
- In the first *America's Top Stations* study, published in 1997, two important elements emerged as contributing to **Time Spent Listening**:
 - » “Occasions” of Listening: now known as “Tune-Ins”
 - » “Time Spent Per Occasion”: now known as “Time Spent Per Tune-In”



Time Spent Listening =
“Tune-Ins” X “Time Spent Per Tune-In”

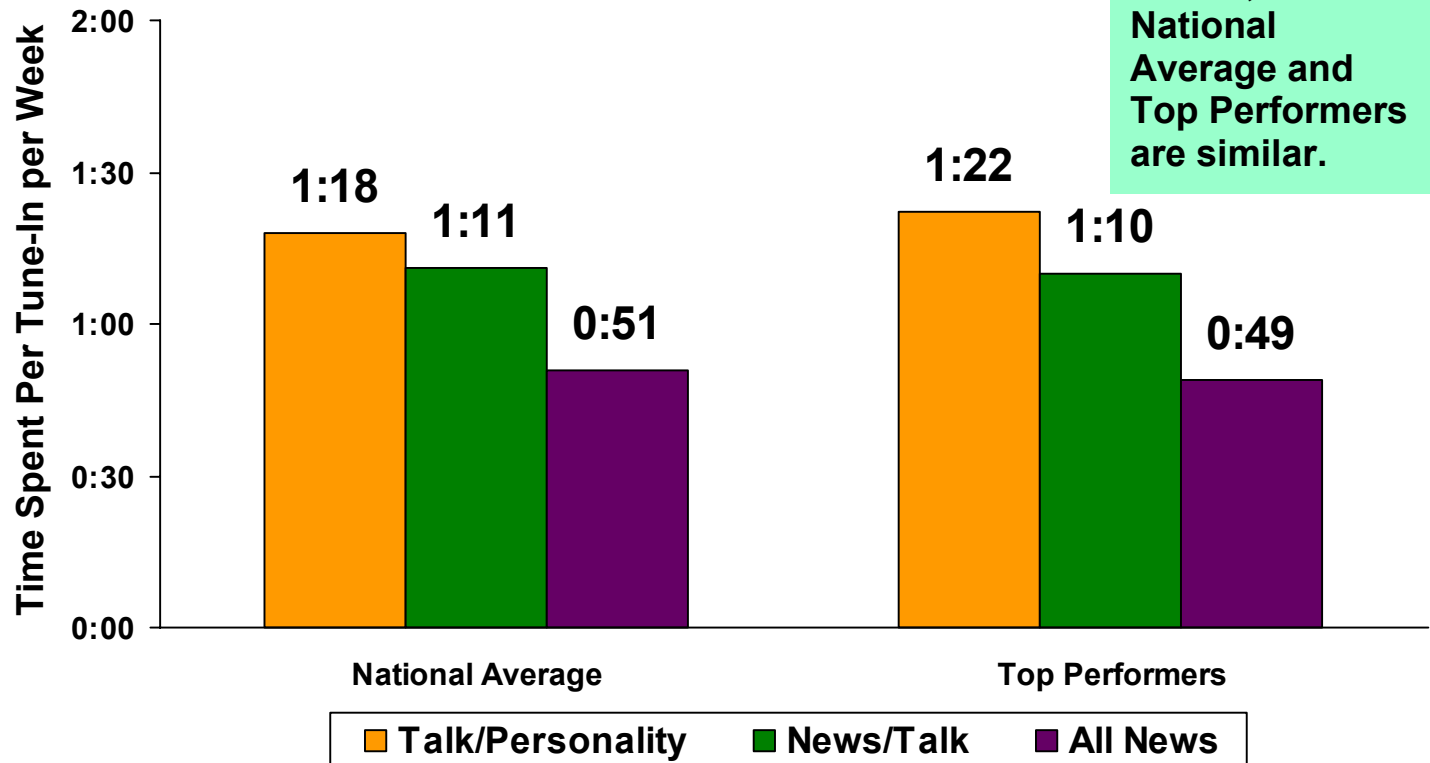
TSL = Tune-Ins X Time Spent Per Tune-In

Talk/Personality station listeners tune in 21% more than All News listeners.



TSL = Tune-Ins X Time Spent Per Tune-In

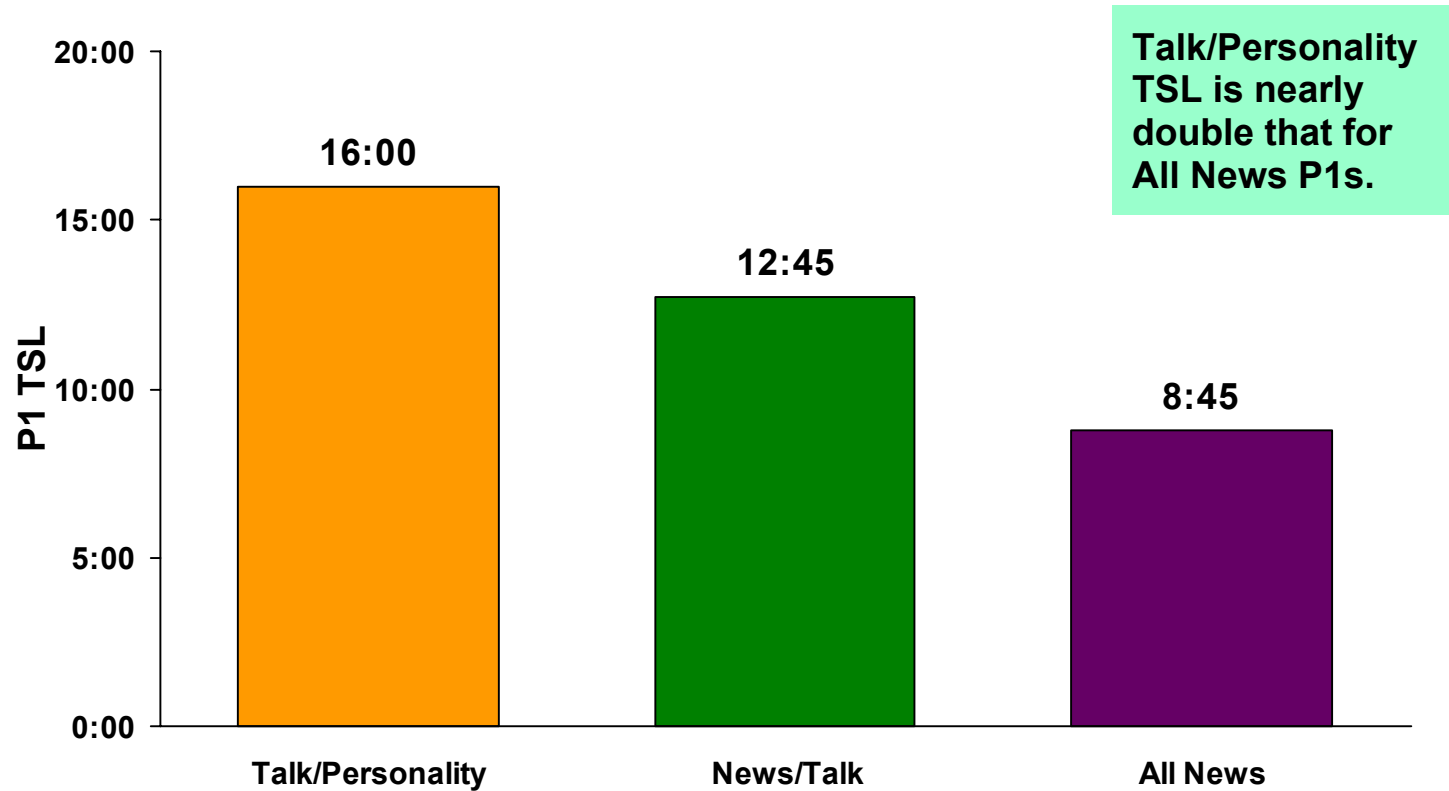
Time Spent Listening differs greatly by format, but National Average and Top Performers are similar.



How Do Stations Drive TSL?

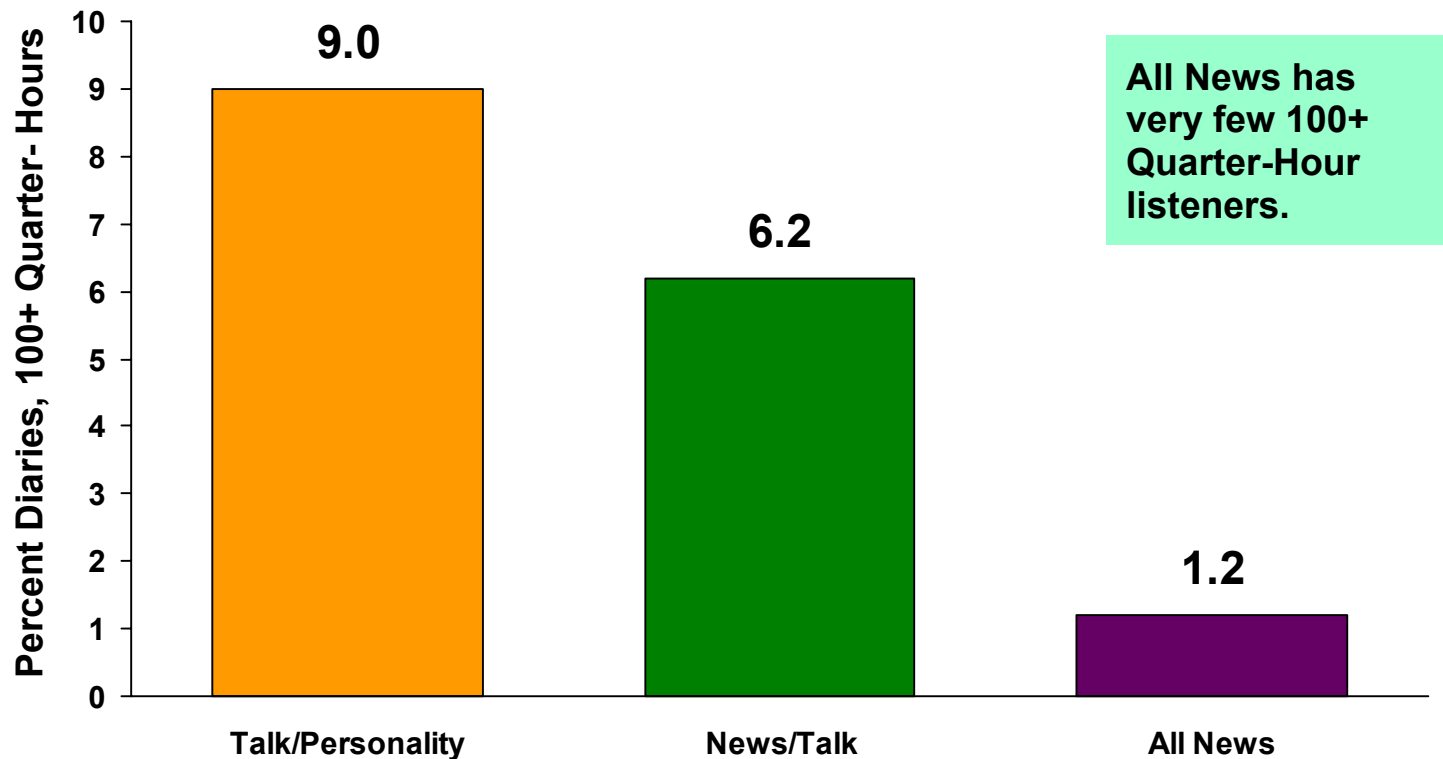
- **Both “Tune-Ins” and “Time Spent Per Tune-In” are the driving forces behind the TSL strength of Talk/Personality Top Performers**
- **All News stations should strive for more Cume per week if the Tune-Ins and Time Spent Per Tune-In cannot be increased**
- **“Tune-Ins” are driven by “appointment listening” and (in music formats) contests**

How Much TSL Is Coming from Top Performers P1s?



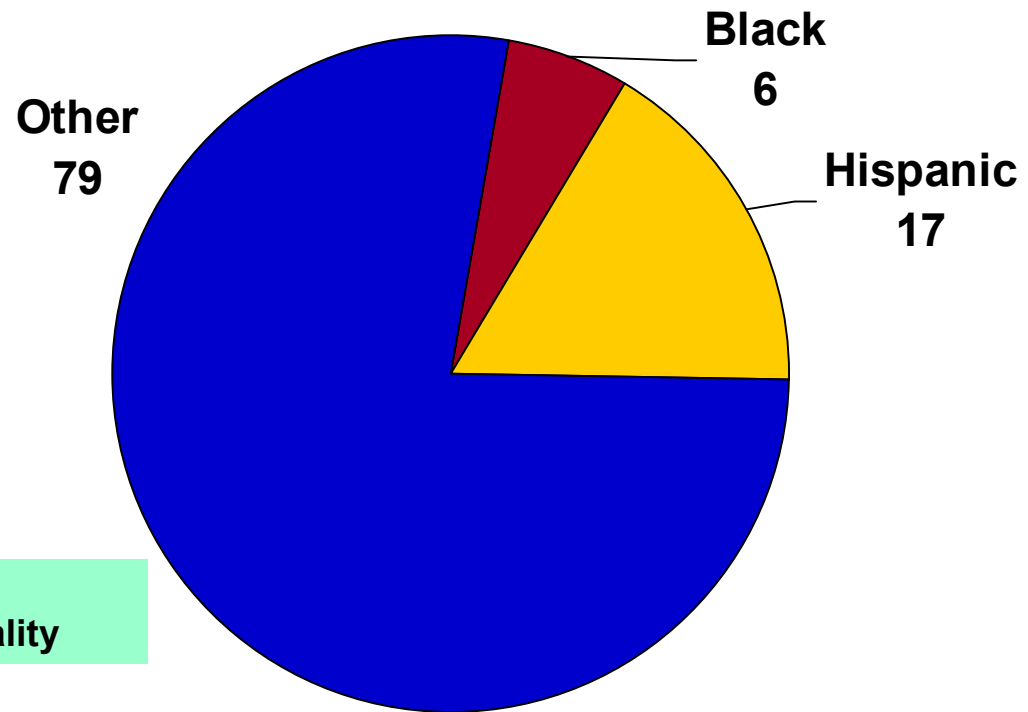
What Else Is Driving TSL?

100+ Quarter-Hour (25+ Hours/Week) Listeners (Ultra-Core)



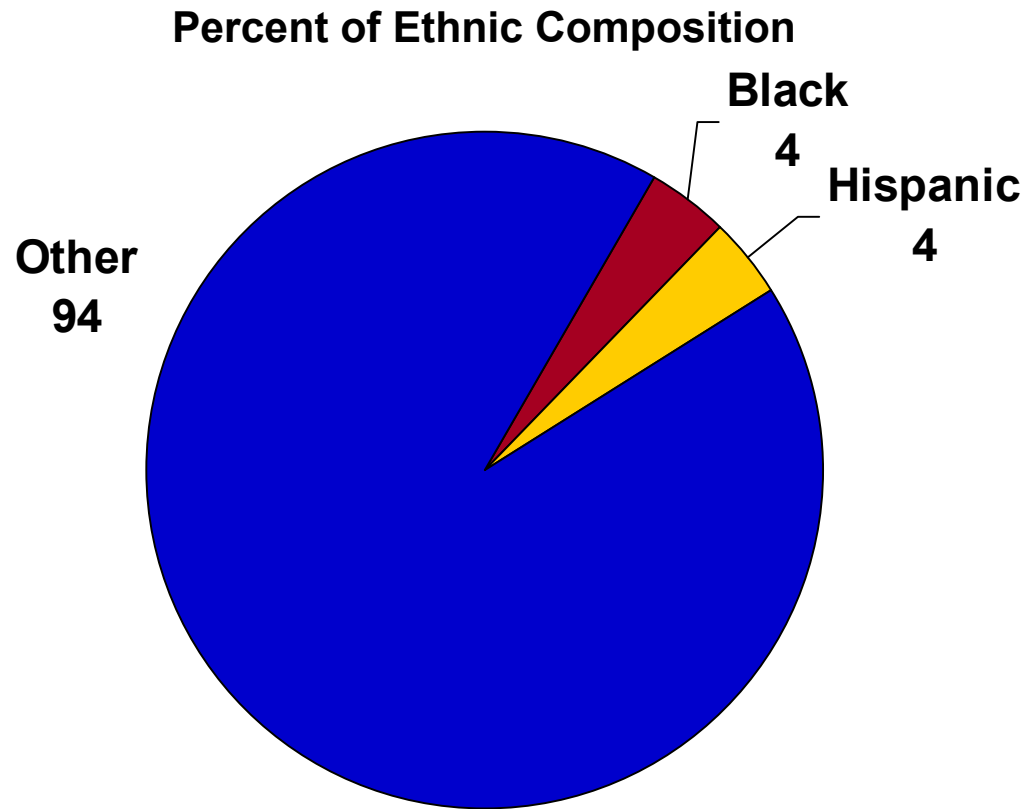
How Does Ethnic Composition Affect All News?

Percent of Ethnic Composition



Source: PD Advantage, Top Performers, Spring 2002, P12+, Mon-Sun 6A-Mid
(Rounds to over 100%)

How Does Ethnic Composition Affect News/Talk?



Source: PD Advantage, Top Performers, Spring 2002, P12+, Mon-Sun 6A-Mid
(Rounds to over 100%)

How Does Ethnic Population Change Your Expectations?

- **What is your station's Ethnic Composition?**
- **With around 80% to 95% "other" listeners, how has your market population composition affected your potential share of the radio listening pie?**
- **How have "other" population percentages changed since the 1990s?**

So How Have Markets Changed?

Metro	Percent "Other" P12+ Population		Percent Difference
	1993	2003	
El Paso	28.8	19.0	-34.0%
Miami	48.4	38.3	-20.9%
Odessa-Midland	69.3	59.8	-13.7%
Dallas-Ft. Worth	74.0	65.2	-11.9%
Houston-Galveston	62.7	55.6	-11.3%
Phoenix	82.2	72.9	-11.3%
Atlanta	72.6	64.6	-11.0%
Amarillo	82.9	75.9	-8.4%

High Hispanic Population Markets!

So How Have Other Markets Changed?

Metro	Percent "Other" P12+ Population		Percent Difference
	1993	2003	
San Antonio	48.8	44.8	-8.2%
Chicago	71.5	65.7	-8.1%
Washington, DC	68.3	63.1	-7.6%
Denver-Boulder	83.6	78.0	-6.7%
Nashville	84.8	81.3	-4.1%
Kansas City	85.2	81.9	-3.9%
Indianapolis	86.0	82.8	-3.7%
St. Louis	82.6	80.7	-2.3%
Detroit	77.2	75.7	-1.9%

Summary: What Does It Take to Be a Top Performer?

- **Talk/Personality**

- » Highest TSL for Top Performers – 9:30, despite having the lowest Cume Rating (8.5 for P12+)
- » Highest Tune-Ins (6.9) and Time Spent Per Tune-In (1:22)
- » Most male-dominated format at 76%
- » P1s give these stations 16:00 of TSL
- » Ultra-Core listeners are 9.0% of listeners

Summary: What Does It Take to Be a Top Performer?

- **News/Talk**

- » Cume and TSL are both strong
- » Top Performers pull a 5.0 share – highest of the group
- » Best balance of In-Car (41%), At-Home (35%) and At-Work listening (23%)

Summary: What Does It Take to Be a Top Performer?

- **All News**

- » Since TSL is the same (4:45) for the National Average and the Top Performers, you have to concentrate on Cume to drive the AQH estimate
- » In-Car listening is strongest with All News, so reminding people to tune in when they are in their cars makes the most sense
- » All News has a better Gender Composition ratio than the other two formats (57 Men/43 Women)

Top Performers in News/Talk

Thank You!