



PARAGON

MEDIA STRATEGIES



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John Sutton & Associates

Real Time Radio & Ratings

PPM Case Studies:
Public & Commercial Radio Comparisons
in Philadelphia, Houston & New York

December 2007



&



Real Time Radio and Ratings

- ❖ PPM introduces new dynamics into Arbitron's radio ratings
 - Captures listeners' real time response
 - Public Radio is now in the book for all to see



Public Radio is Now “In the Book”

- ❖ Public radio consistently ranks Top 5 in 25-54 in several markets including Boston, Washington D.C. and Portland, OR.
- ❖ What does PPM tell us about public radio in Houston, New York, and Philadelphia?



Public Radio: Diaries to PPM

Mon-Sun 6a-12m, Persons 12+	Cume
WNYC A/F New York NPR News/Talk	- 19%
KUHF-F Houston NPR News/Classical	- 4%
WHYY-F Philadelphia NPR News/Talk	9%
WXPN-F Philadelphia AAA	12%
WRTI-F Philadelphia Classical/Jazz	22%

Source: Arbitron/PPM Metro, Sept-Nov 2007 (NY is Oct-Nov only) Dairy Source: Arbitron/RRC Metro, Fall 2006



Public Radio: Diaries to PPM

Mon-Sun 6a-12m, Persons 12+	Cume	AQH
WNYC A/F New York NPR News/Talk	- 19%	- 45%
KUHF-F Houston NPR News/Classical	- 4%	- 50%
WHYY-F Philadelphia NPR News/Talk	9%	- 15%
WXPN-F Philadelphia AAA	12%	- 49%
WRTI-F Philadelphia Classical/Jazz	22%	- 48%

Source: Arbitron/PPM Metro, Sept-Nov 2007 (NY is Oct-Nov only) Dairy Source: Arbitron/RRC Metro, Fall 2006



Public Radio Full Week AQH Ranks

Mon-Sun 6a-12m	12+
WNYC A/F New York NPR News/Talk	21
KUHF-F Houston NPR News/Classical	24
WHYY-F Philadelphia NPR News/Talk	10
WXPN-F Philadelphia AAA	23
WRTI-F Philadelphia Classical/Jazz	22

Source: Arbitron/PPM Metro, Sept-Nov 2007 (NY is Oct-Nov only)



Public Radio Full Week AQH Ranks

Mon-Sun 6a-12m	12+	25-54
WNYC A/F New York NPR News/Talk	21	20
KUHF-F Houston NPR News/Classical	24	25
WHYY-F Philadelphia NPR News/Talk	10	10
WXPN-F Philadelphia AAA	23	20
WRTI-F Philadelphia Classical/Jazz	22	27

Source: Arbitron/PPM Metro, Sept-Nov 2007 (NY is Oct-Nov only)



Public Radio Full Week AQH Ranks

Mon-Sun 6a-12m	12+	25-54	College+
WNYC A/F New York NPR News/Talk	21	20	3
KUHF-F Houston NPR News/Classical	24	25	3
WHYY-F Philadelphia NPR News/Talk	10	10	2
WXPN-F Philadelphia AAA	23	20	9
WRTI-F Philadelphia Classical/Jazz	22	27	9

Source: Arbitron/PPM Metro, Sept-Nov 2007 (NY is Oct-Nov only)



Public Radio in the Book

- ❖ No major impact on the 12+ and 25-54 rankings, so far
- ❖ College graduates are a critical demo for public radio
- ❖ Public radio shows strength in morning drive



NPR's Morning Edition AQH Ranks

Mon-Fri 6a-9a	12+
WNYC A/F New York NPR News/Talk	10
KUHF-F Houston NPR News/Classical	11
WHYY-F Philadelphia NPR News/Talk	9

Source: Arbitron/PPM Metro, Sept-Nov 2007 (NY is Oct-Nov only)

NPR's Morning Edition AQH Ranks

Mon-Fri 6a-9a	12+	25-54
WNYC A/F New York NPR News/Talk	10	15
KUHF-F Houston NPR News/Classical	11	9
WHYY-F Philadelphia NPR News/Talk	9	4

Source: Arbitron/PPM Metro, Sept-Nov 2007 (NY is Oct-Nov only)

NPR's Morning Edition AQH Ranks

Mon-Fri 6a-9a	12+	25-54	College+
WNYC A/F New York NPR News/Talk	10	15	1
KUHF-F Houston NPR News/Classical	11	9	1
WHYY-F Philadelphia NPR News/Talk	9	4	2

Source: Arbitron/PPM Metro, Sept-Nov 2007 (NY is Oct-Nov only)



Public Radio AQH Composition

Mon-Sun 6a-12m	College+
WNYC A/F New York NPR News/Talk	65%
KUHF-F Houston NPR News/Classical	80%
WHYY-F Philadelphia NPR News/Talk	75%
WXPB-F Philadelphia AAA	61%
WRTI-F Philadelphia Classical/Jazz	59%

Source: Arbitron/PPM Metro, Sept-Nov 2007 (NY is Oct-Nov only)



Philadelphia Cume Rating: College Grads

Mon-Sun 6a-12m	College+ Cume Rtg
1. WBEB-F Adult Contemporary	40.4%
2. KYW-A All News	36.0%
3. WOGL-F Classic Hits	28.4%
8. WHYY-F NPR News/Talk	20.3%

Source: Arbitron/PPM Metro, Sept-Nov 2007 (NY is Oct-Nov only)



New York Cume Rating: College Grads

Mon-Sun 6a-12m	College+ Cume Rtg
1. WLTW-F Adult Contemporary	34.1%
2. WWFS-F Adult Contemporary	27.6%
3. WCBS-F Classic Hits	27.1%
14. WNYC A/F NPR News/Talk	11.5%

Source: Arbitron/PPM Metro, Oct-Nov 2007

New York Morning News Duplication

Mon-Fri 6a-9a	WNYC A/F	WINS-A	WCBS-A
WNYC A/F NPR News/Talk	--	3%	7%
WINS-A News	9%	--	20%
WCBS-A News	16%	14%	--

Source: Arbitron/PPM Metro, Oct-Nov 2007, Cume Persons 12+



Philadelphia Morning Duplication

Mon-Fri 6a-9a	WHYY-F	KYW-A
WHYY A/F NPR News/Talk	--	5%
KYW-A News	15%	--

Source: Arbitron/PPM Metro, Sep-Nov 2007, Cume Persons 12+



Morning Competition

- ❖ While Public Radio shows strength in morning drive, the commercial All News stations remain strong
- ❖ There is not a lot of Cume crossover in morning drive from commercial All News stations to Public Radio news stations



P1 Composition

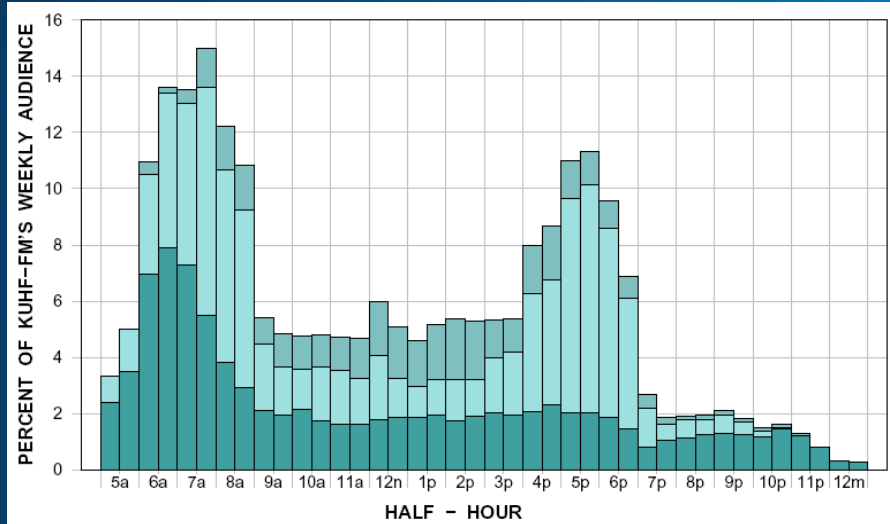
Mon-Sun 6a-12m	Cume	AQH
KUHF-FM NPR News/Classical	29%	69%
WNYC-AM NPR News/Talk	37%	76%
WNYC-FM NPR News/Talk	31%	69%
WHYY-FM NPR News/Talk	52%	82%
WRTI-FM Classical/Jazz	23%	65%
WXPB-FM AAA	21%	61%

Source: Arbitron/PPM Houston, New York, Philadelphia Metros, October Monthly, P12+

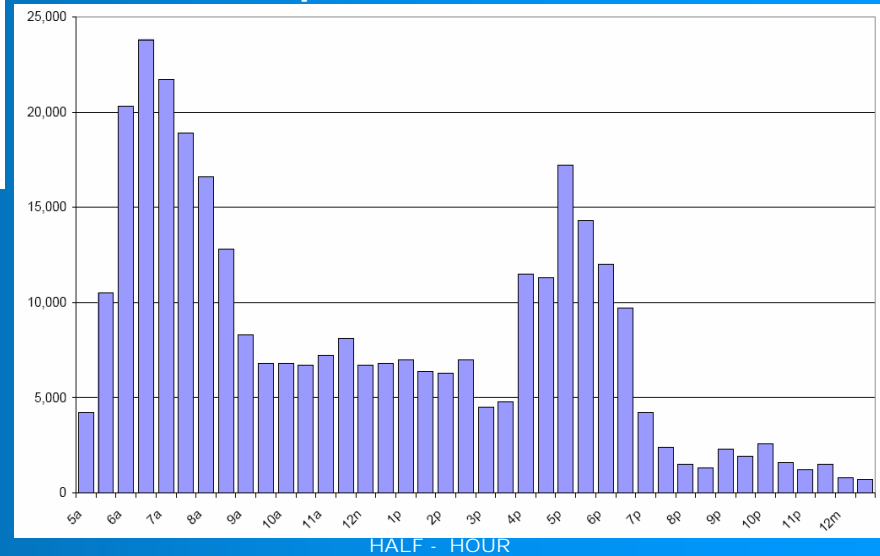


KUHF Houston: Weekday Audience Flow

Fall 2006 - Diaries



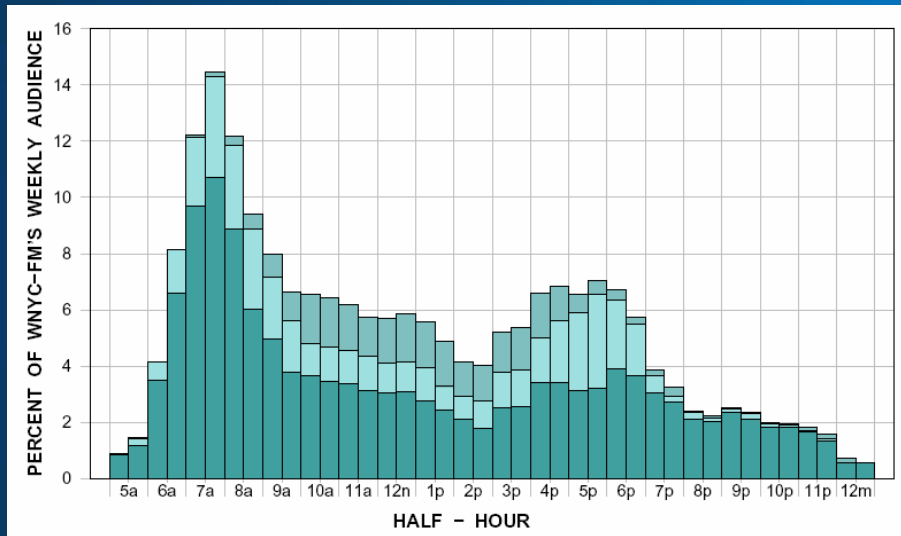
Sep/Oct 2007 - PPM



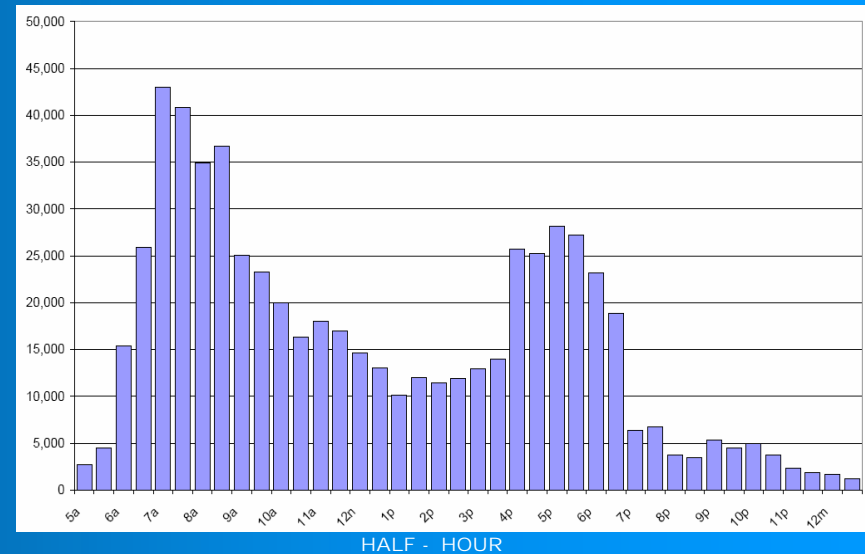
Diary Source: Arbitron/AudiGraphics, Total Market, Persons 12+ AudiGraphics © Copyright © 2007 AudiGraphics, Inc.
 PPM Source: Arbitron, Metro, Persons 12+

WNYC-FM New York: Weekday Audience Flow

Fall 2006 - Diaries



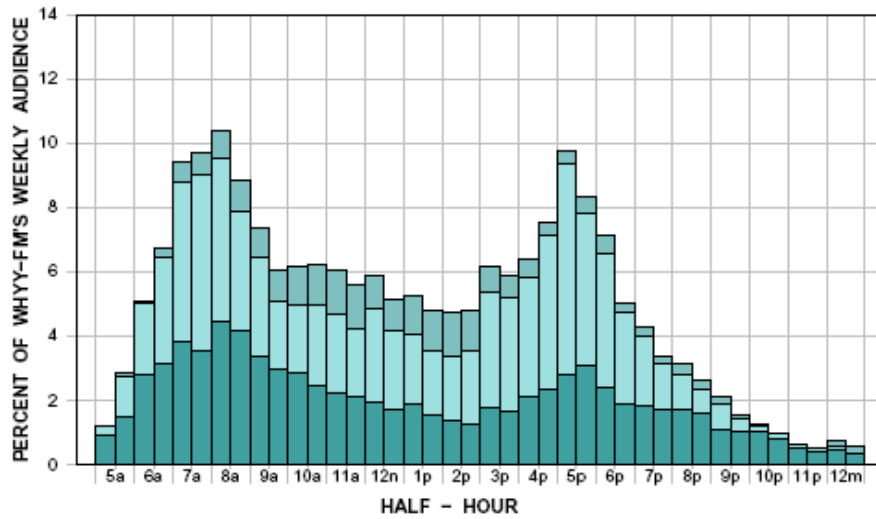
Oct 2007 - PPM



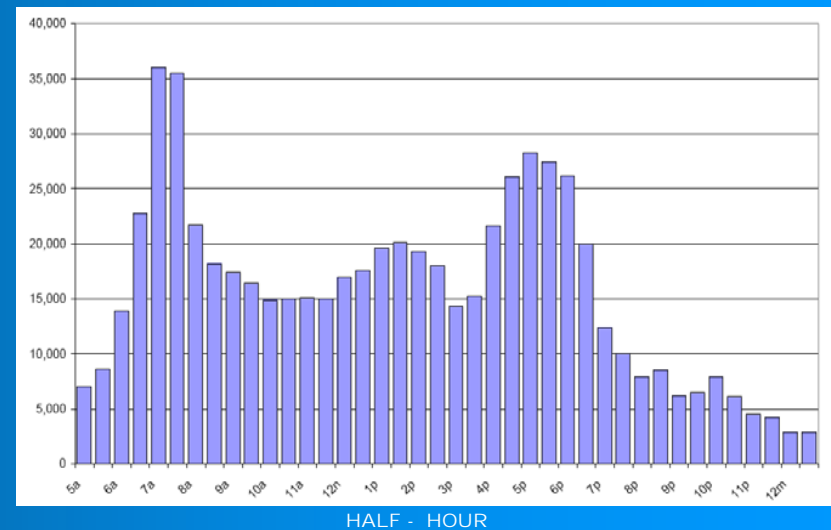
Diary Source: Arbitron/AudiGraphics, Total Market, Persons 12+ AudiGraphics © Copyright © 2007 A udiGraphics, Inc.
 PPM Source: Arbitron, Metro, Persons 12+

WHYY Philadelphia: Weekday Audience Flow

Fall 2006 - Diaries



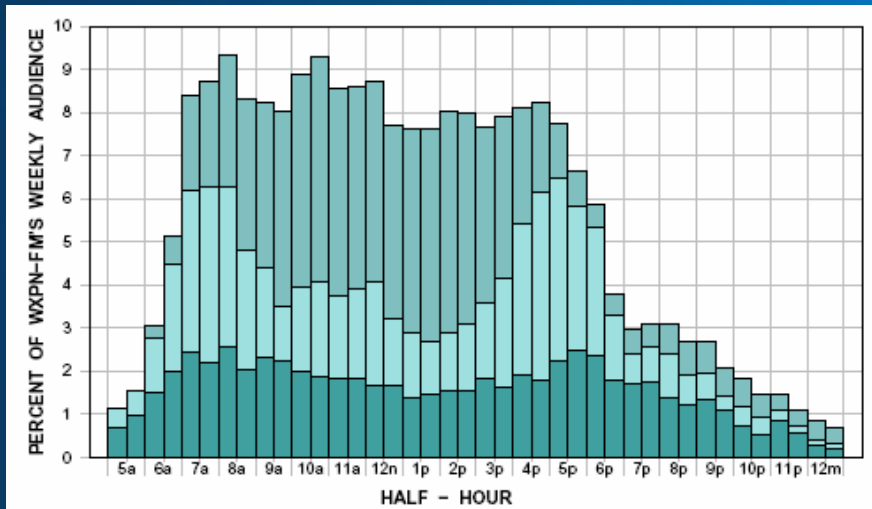
Sep/Oct 2007 - PPM



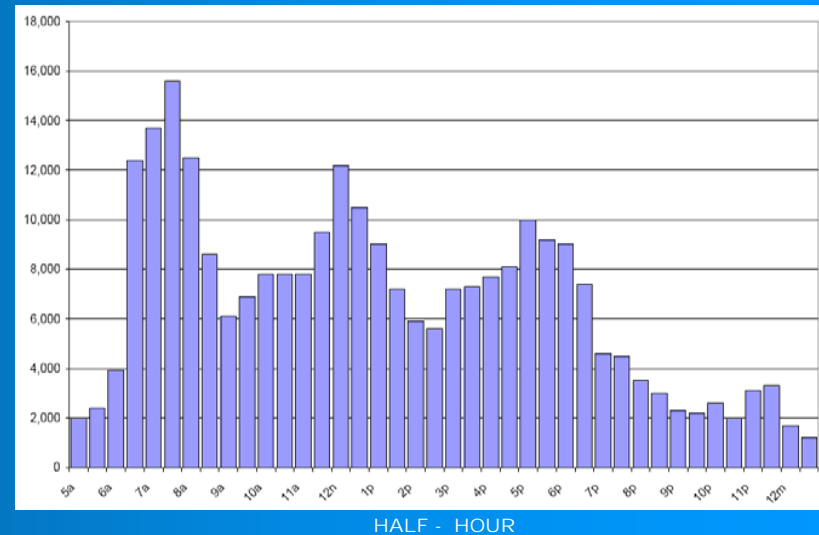
Diary Source: Arbitron/AudiGraphics, Total Market, Persons 12+ AudiGraphics © Copyright © 2007 A udiGraphics, Inc.
 PPM Source: Arbitron, Metro, Persons 12+

WXPN Philadelphia: Weekday Audience Flow

Fall 2006 - Diaries

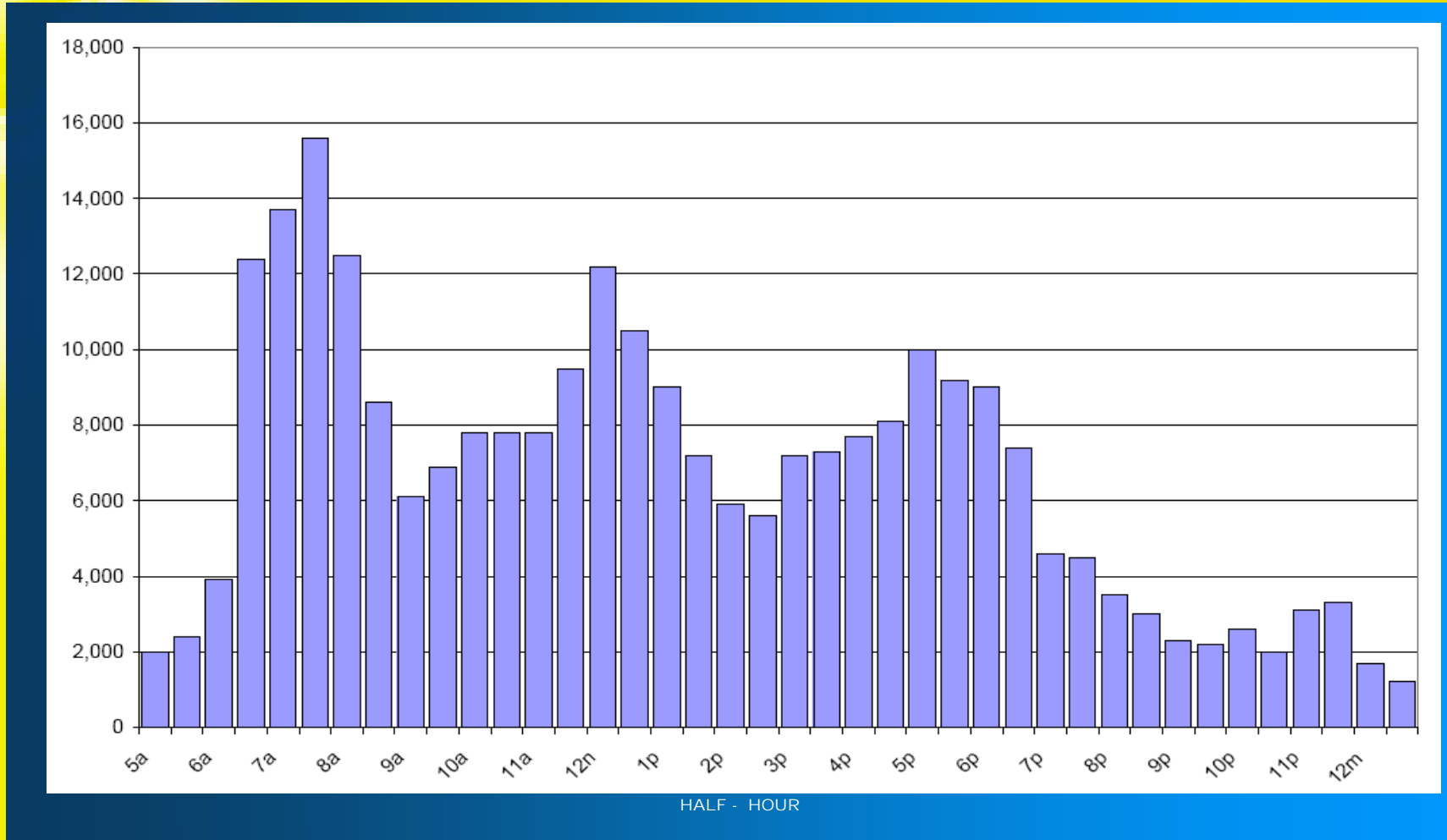


Sep/Oct 2007 - PPM



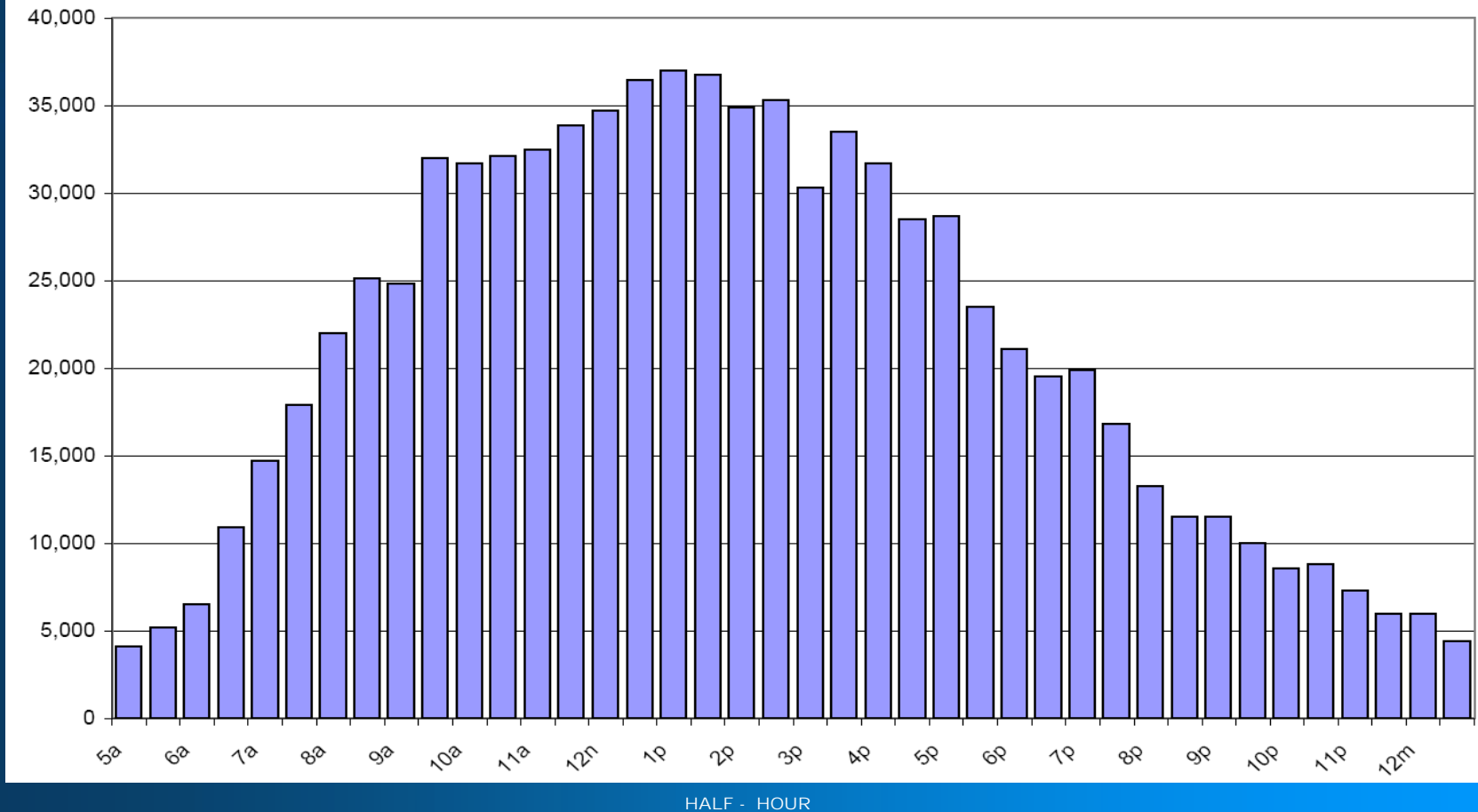
Diary Source: Arbitron/AudiGraphics, Total Market, Persons 12+ AudiGraphics © Copyright © 2007 A udiGraphics, Inc.
 PPM Source: Arbitron, Metro, Persons 12+

WXPN Philadelphia: Weekday Audience Flow



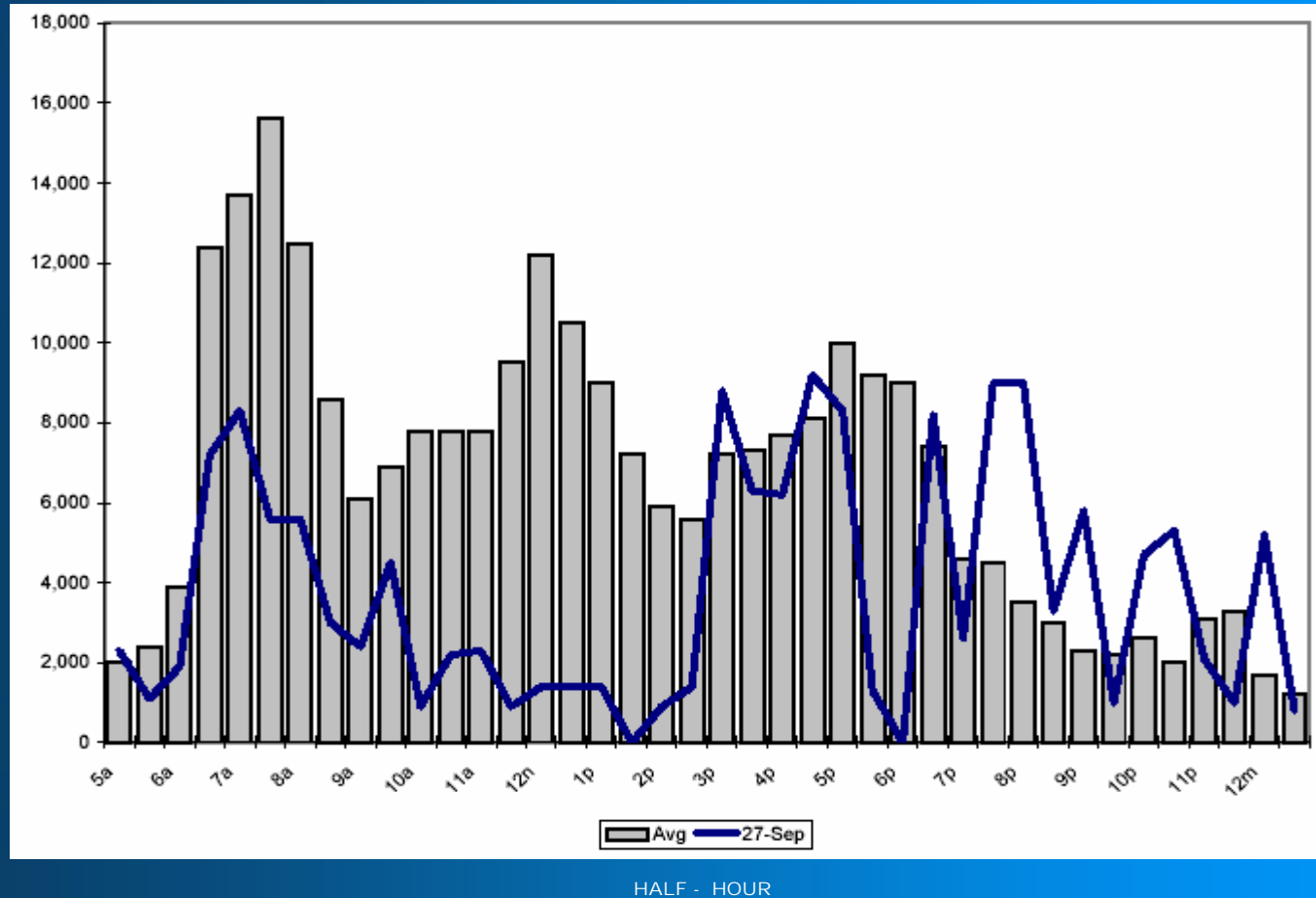
Source: Arbitron/PPM Sep/Oct 07, Metro, Persons 12+

WRFF Philadelphia: Weekday Audience Flow



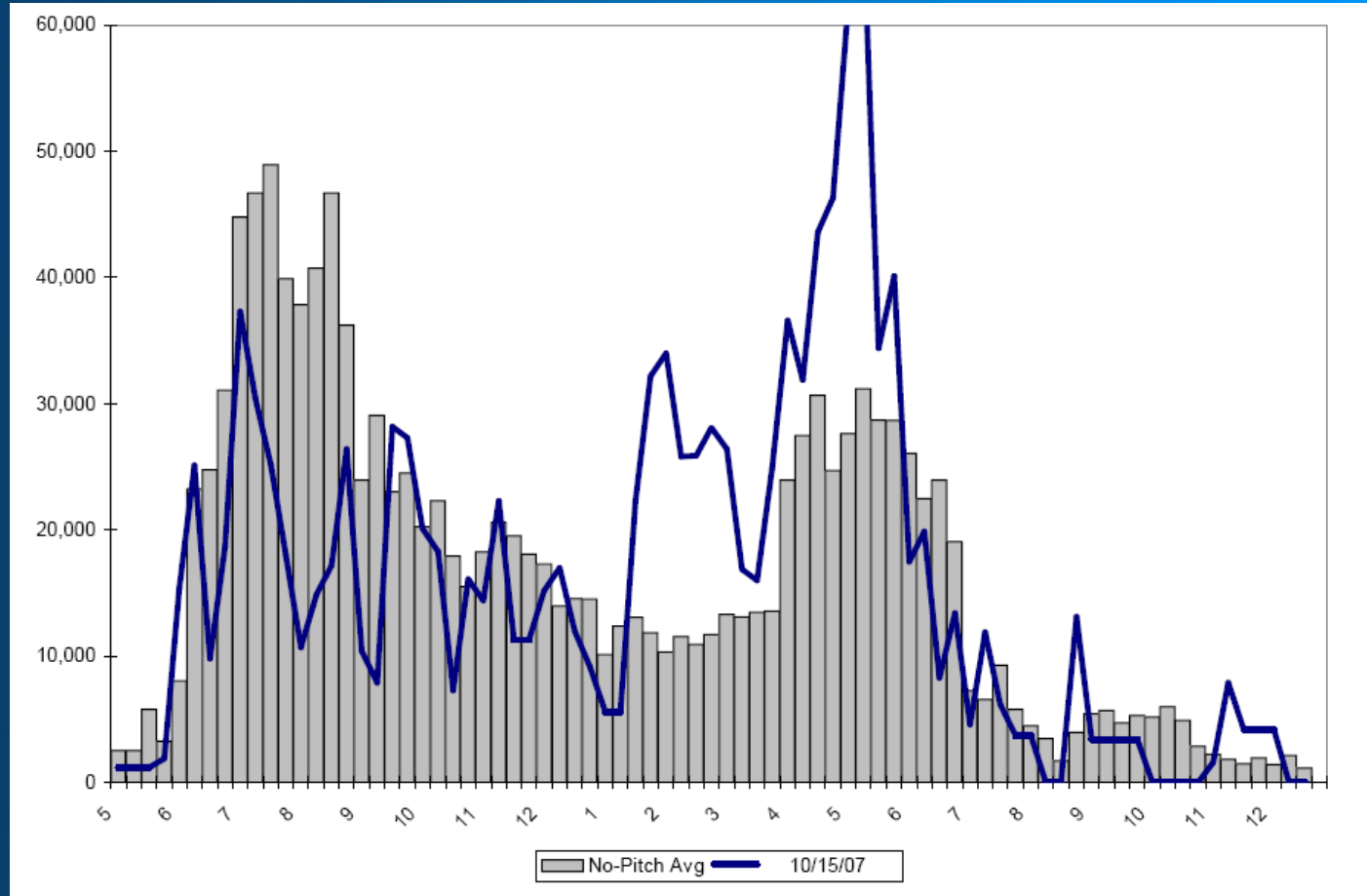
Source: Arbitron/PPM Sep/Oct 07, Metro, Persons 12+

WXPN Philadelphia: Weekday Audience Flow



Source: Arbitron/PPM Sep/Oct 07, Metro, Persons 12+

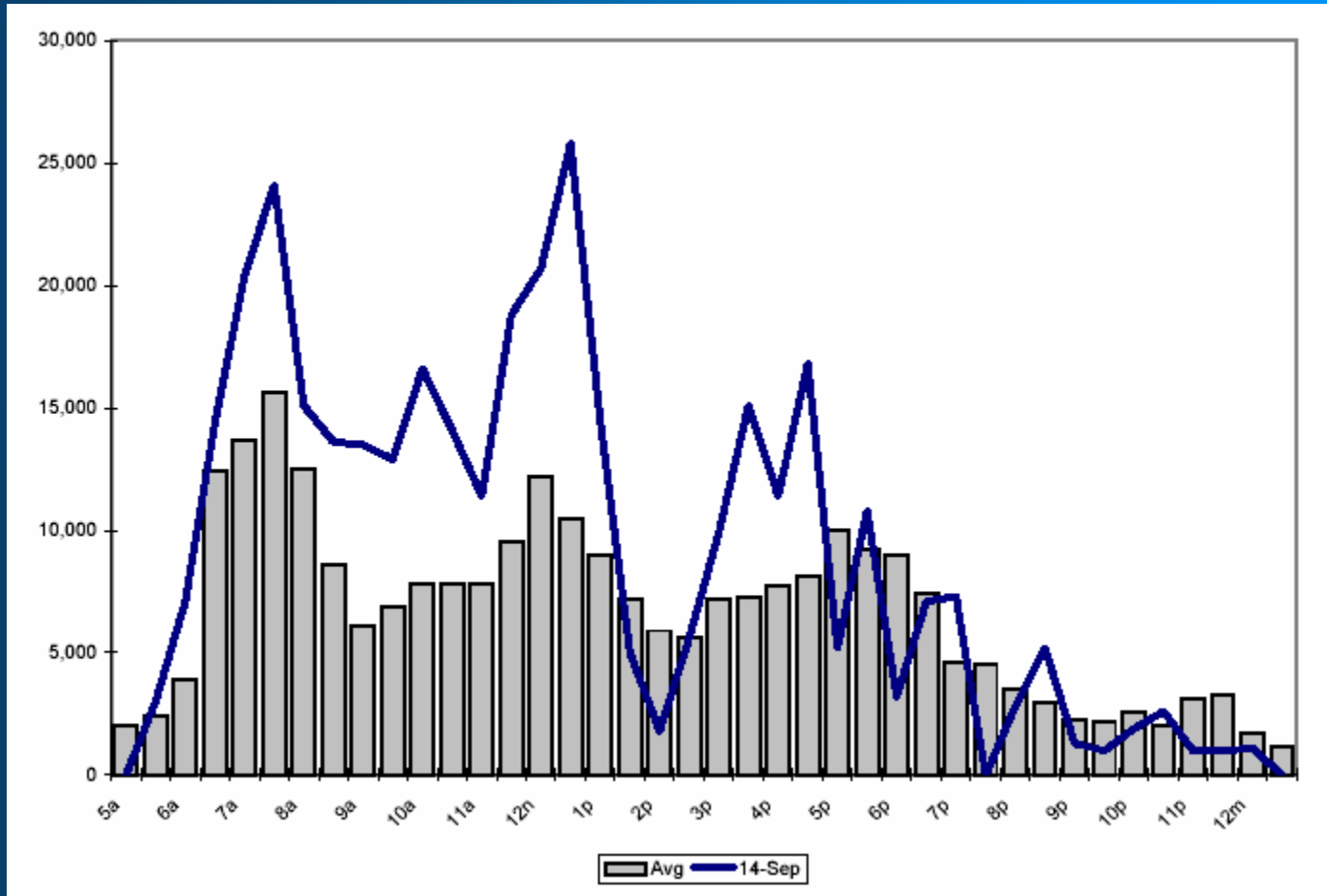
WNYC-FM New York: Weekday Audience Flow



HALF - HOUR

Source: Arbitron/PPM Sep/Oct 07, Metro, Persons 12+

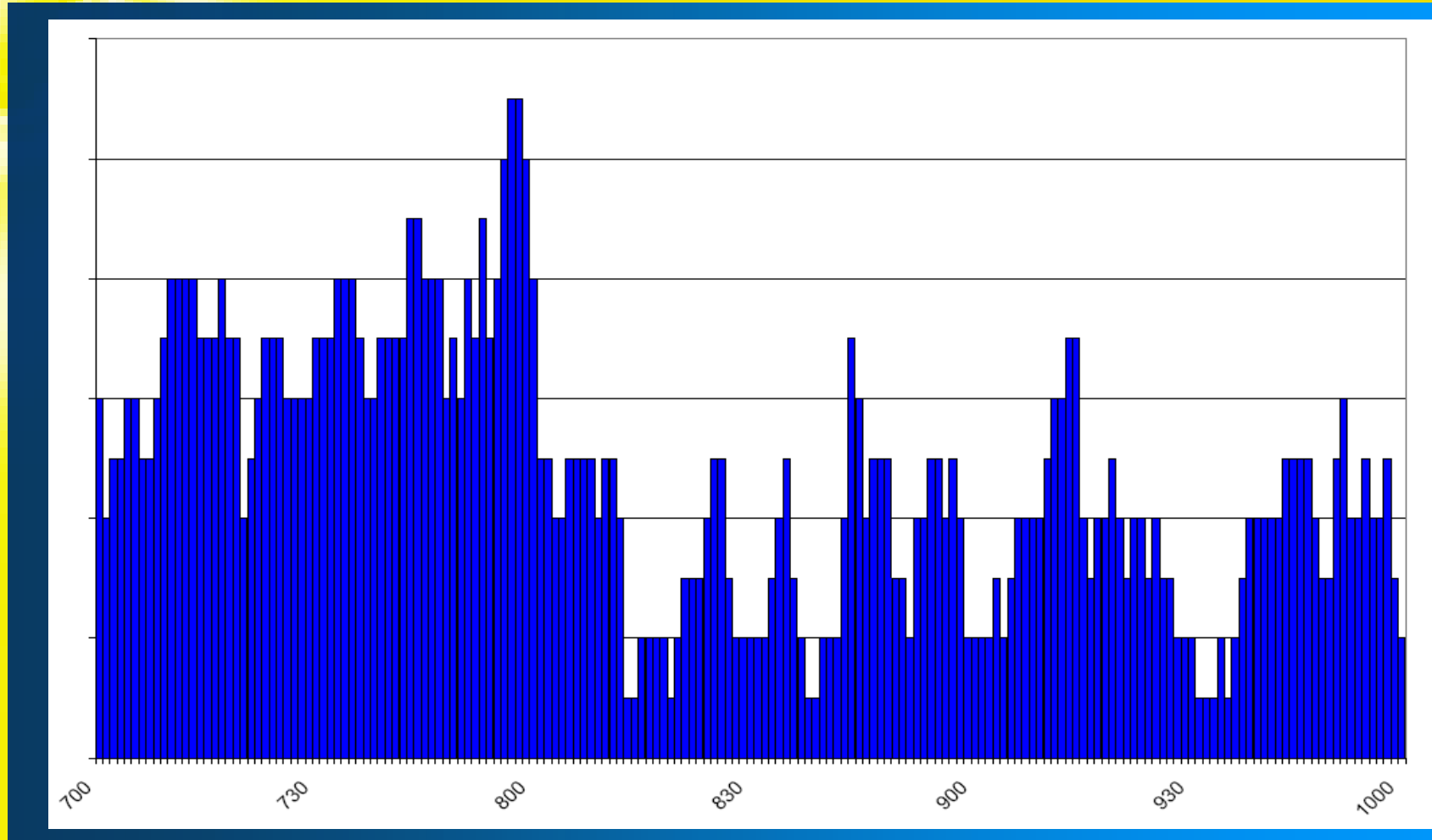
WXPN Philadelphia: Weekday Audience Flow



HALF - HOUR

Source: Arbitron/PPM Sep/Oct 07, Metro, Persons 12+

WXPN Philadelphia: Minute-by-Minute



Source: Arbitron/PPM Sep 14 2007, Metro, Persons 12+, 7a-10a

Market

- Houston
- Philadelphia
- Public Radio**

Analysis | Media Log | **Audience Response** | My Panels | Preferences

WXPN-FM / Public Radio Friday, September 14, 2007

Station

- KUHF-FM
- WBGO-FM
- WFUV-FM
- WHYY-FM
- WNYC-AM
- WNYC-FM
- WRTI-FM
- WXPN-FM**

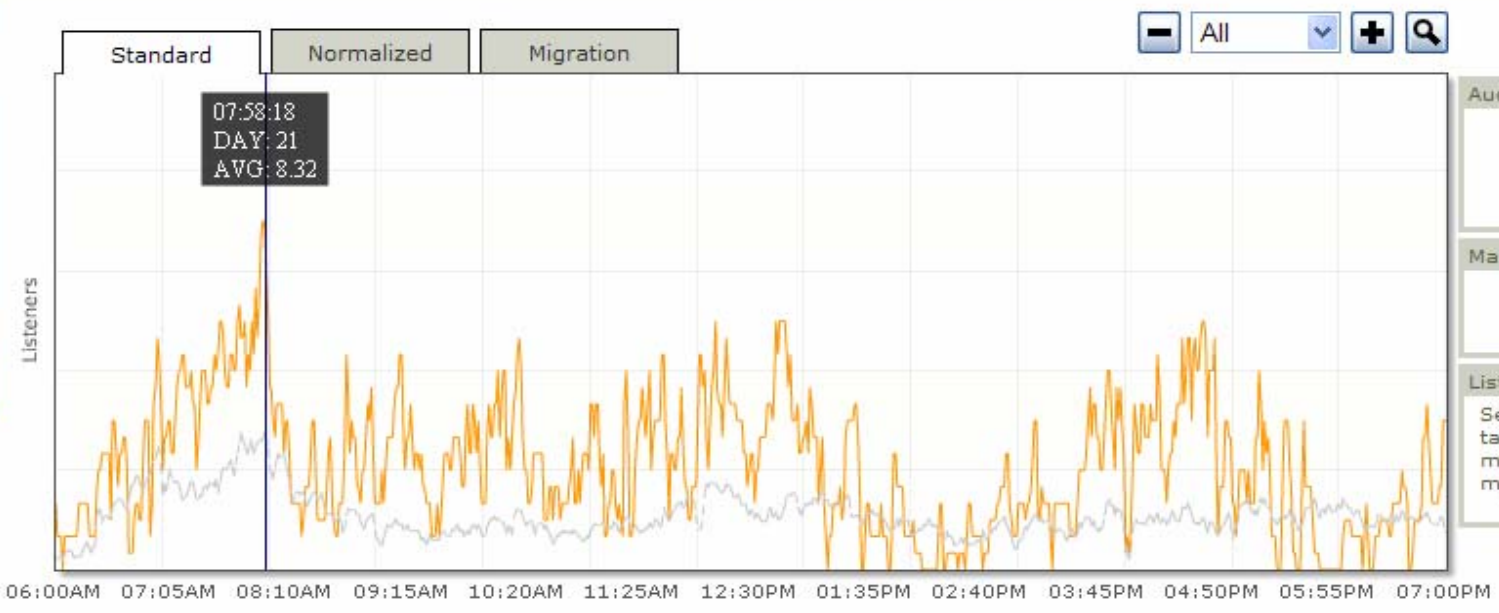
Day to Examine
9/14/2007

Average:
Start Date
9/4/2007

End Date
9/28/2007

Hours
6AM-7PM

Days
Weekdays







Audio Playback

⏪ ⏩ ⏴ ⏵

Marker Position
07:58 AM

Listeners Migration
Select the "Migration" tab and click on minute to get the migration detail

9/14/2007 2:00:00 AM				
2:39:28 AM	00:57	The Ghost Of Genova Heights	Stars	
9/14/2007 6:00:00 AM				
6:07:52 AM	02:47	How Glad I Am	Greyboy Allstars	
6:24:16 AM	04:01	Lady Loop	ALO (Animal Liberation Orchestra)	
9/14/2007 7:00:00 AM				
7:15:34 AM	00:25	Live Nation	Live Nation, Inc.	Production Company 

Market

- Houston
- Philadelphia
- Public Radio**

Analysis Media Log **Audience Response** My Panels Preferences

WXPN-FM / Public Radio Friday, September 14, 2007

Station

- KUHF-FM
- WBGO-FM
- WFUV-FM
- WHYY-FM
- WNYC-AM
- WNYC-FM
- WRTI-FM
- WXPN-FM**

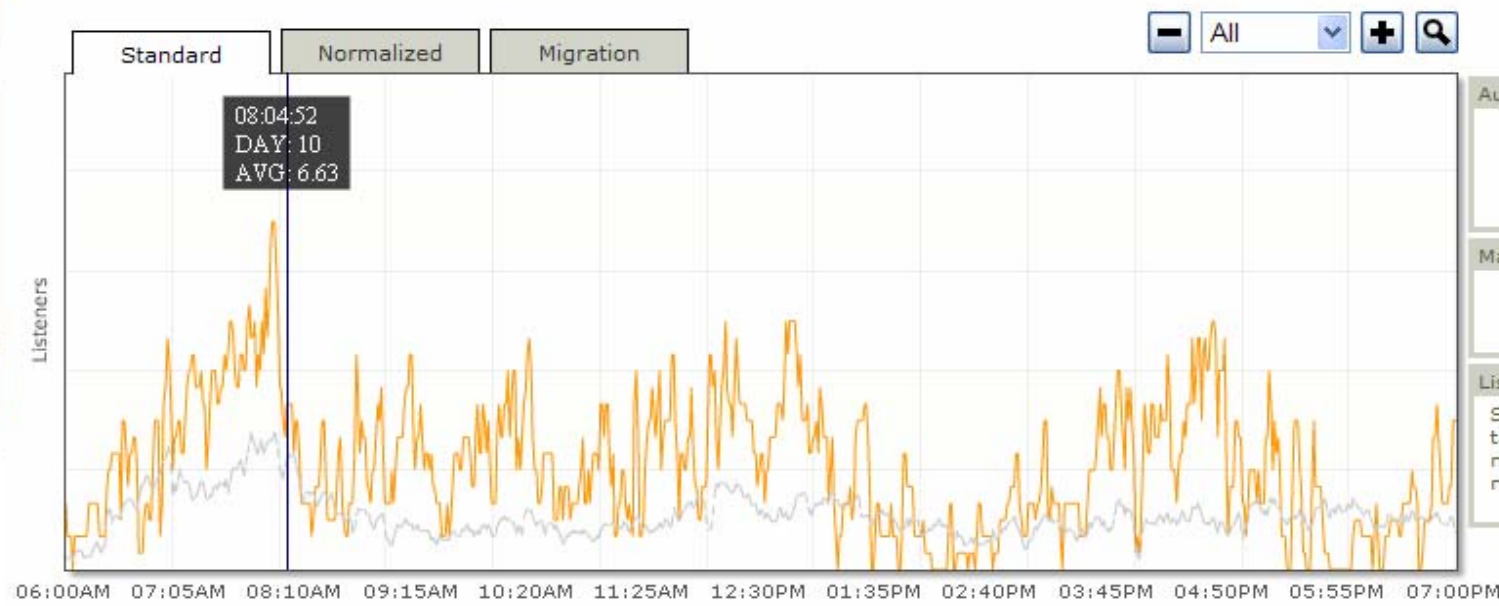
Day to Examine
9/14/2007

Average:
Start Date
9/ 4/2007

End Date
9/28/2007

Hours
6AM-7PM

Days
Weekdays



9/14/2007 8:00:00 AM				
7:15:34 AM	00:25	Live Nation	Live Nation, Inc.	Production Company
7:16:25 AM	03:22	Better Than	John Butler Trio	
7:31:10 AM	00:28	The Nonprofit Center	La Salle University	Vocational & Training Schools
7:32:40 AM	03:49	Winter Windows	Sea Wolf	
9/14/2007 9:00:00 AM				
8:34:59 AM	02:51	Effect And Cause	White Stripes	
8:39:12 AM	00:27	Zoellner Arts Center	Lehigh University	Live Theater, Opera, Music, Dance

Market

Houston
Philadelphia
Public Radio

Analysis

Media Log

Audience Response

My Panels

Preferences

WXPN-FM / Public Radio Friday, September 14, 2007

Station

KUHF-FM
WBGO-FM
WFUV-FM
WHYY-FM
WNYC-AM
WNYC-FM
WRTI-FM
WXPN-FM

Day to Examine

9/14/2007

Average: Start Date

9/ 4/2007

End Date

9/28/2007




Audio Playback



Stopped

Marker Position

08:01 AM 

Listeners Migration

09/14/2007 08:01AM

2 listeners tuned out.
1 listener switched to WIOQ-FM.

0AM 07:05AM 08:10AM 09:15AM 10:20AM 11:25AM 12:30PM 01:35PM 02:40PM 03:45PM 04:50PM 05:55PM 07:00PM






Hours

6AM-7PM

Days

Weekdays



7:31:10 AM	00:28	The Nonprofit Center	La Salle University	Vocational & Training Schools	
7:32:40 AM	03:49	Winter Windows	Sea Wolf		
9/14/2007 8:00:00 AM					
8:34:59 AM	02:51	Effect And Cause	White Stripes		
8:39:12 AM	00:27	Zoellner Arts Center	Lehigh University	Live Theater, Opera, Music, Dance	
9/14/2007 9:00:00 AM					
9:17:31 AM	00:27	The Chester County Hospital	Health Network Of Chester Cnty. Hosp	Hospitals, Clinics & Medical Centers	

Market

Houston
Philadelphia
Public Radio

Analysis Media Log **Audience Response** My Panels Preferences

WXPN-FM / Public Radio Friday, September 14, 2007

Station

KUHF-FM
WBGO-FM
WFUV-FM
WHYY-FM
WNYC-AM
WNYC-FM
WRTI-FM
WXPN-FM

Day to Examine

9/14/2007

Average: Start Date

9/ 4/2007

End Date

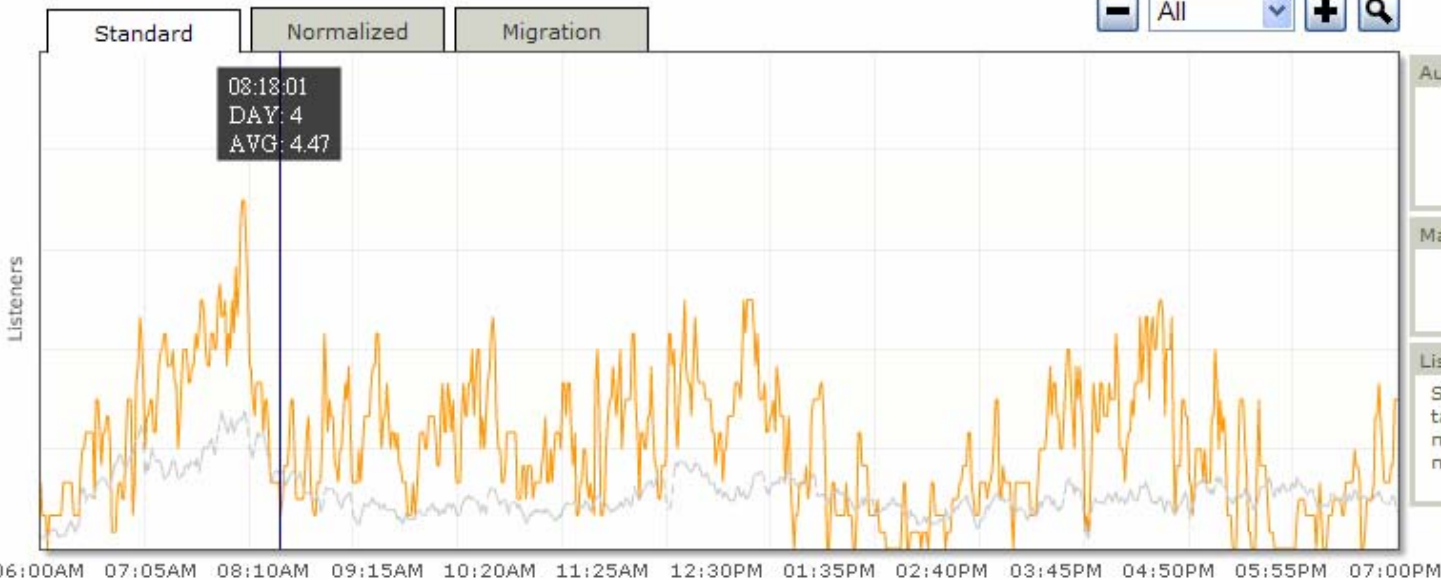
9/28/2007

Hours

6AM-7PM

Days

Weekdays



Audio Playback



Stopped

Marker Position

08:18 AM

Listeners Migration

Select the "Migration" tab and click on minute to get the migration detail

7:31:10 AM	00:28	The Nonprofit Center	La Salle University	Vocational & Training Schools	🔊
7:32:40 AM	03:49	Winter Windows	Sea Wolf		🔊
9/14/2007 8:00:00 AM					
8:34:59 AM	02:51	Effect And Cause	White Stripes		🔊
8:39:12 AM	00:27	Zoellner Arts Center	Lehigh University	Live Theater, Opera, Music, Dance	🔊
9/14/2007 9:00:00 AM					
9:17:31 AM	00:27	The Chester County Hospital	Health Network Of Chester Cnty. Hosp	Hospitals, Clinics & Medical Centers	🔊

Market

Houston
Philadelphia
Public Radio

Station

KUHF-FM
WBGO-FM
WFUV-FM
WHYY-FM
WNYC-AM
WNYC-FM
WRTI-FM
WXPN-FM

Day to Examine

9/14/2007

**Average:
Start Date**

9/ 4/2007

End Date

9/28/2007

Hours

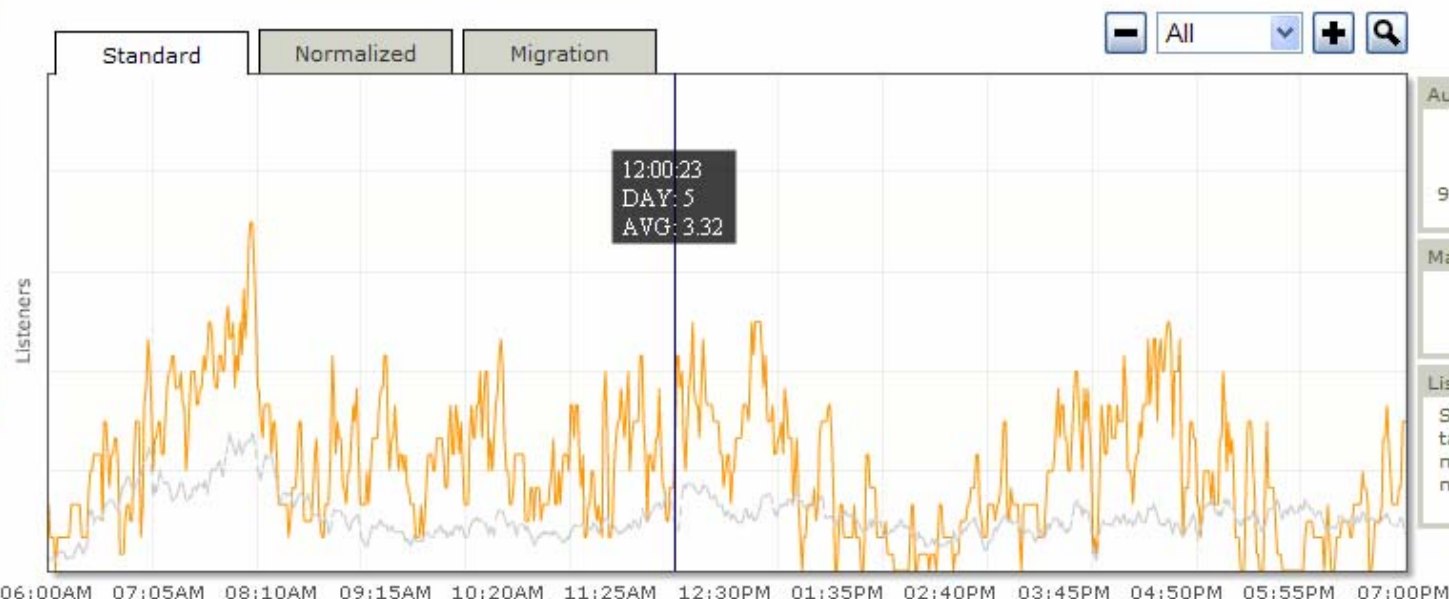
6AM-7PM

Days

Weekdays



WXPN-FM / Public Radio Friday, September 14, 2007



Audio Playback



9/14/2007 12:0

Marker Position

12:00 PM

Listeners Migration

Select the "Migr" tab and click on minute to get the migration detail

9/14/2007 1:00:00 PM

1:34:46 PM	00:29	Greater Delaware Valley Volkswagen	Volkswagen Of America, Inc.	Cars & Lt Trucks, European Factory	
1:50:04 PM	00:25	Rittenhouse Square Fine Arts Show	Rittenhouse Square Fine Arts Assoc.	Amusements & Events	

9/14/2007 2:00:00 PM

2:00:41 PM	00:25	Live Nation	Live Nation, Inc.	Production Company	
2:34:15 PM	00:25	The Grand Opera House	The Grand Opera House, Inc.	Live Theater, Opera, Music, Dance	
2:49:38 PM	00:24	Patriots Theater	Patriots Theater	Live Theater, Opera, Music, Dance	

Market

Houston
Philadelphia
Public Radio

Analysis Media Log **Audience Response** My Panels Preferences

WXPN-FM / Public Radio Friday, September 14, 2007

Station

KUHF-FM
WBGO-FM
WFUV-FM
WHYY-FM
WNYC-AM
WNYC-FM
WRTI-FM
WXPN-FM

Standard **Normalized** Migration

- All + 🔍



Audio Playback



Stopped

Marker Position

12:02 PM

Listeners Migration

Select the "Migration" tab and click on a minute to get the migration details.

Day to Examine

9/14/2007

Average:
Start Date

9/ 4/2007

End Date

9/28/2007

Hours

6AM-7PM

Days

Weekdays



9/14/2007 1:00:00 PM

1:34:46 PM	00:29	Greater Delaware Valley Volkswagen	Volkswagen Of America, Inc.	Cars & Lt Trucks, European Factory	
1:50:04 PM	00:25	Rittenhouse Square Fine Arts Show	Rittenhouse Square Fine Arts Assoc.	Amusements & Events	

9/14/2007 2:00:00 PM

2:00:41 PM	00:25	Live Nation	Live Nation, Inc.	Production Company	
2:34:15 PM	00:25	The Grand Opera House	The Grand Opera House, Inc.	Live Theater, Opera, Music, Dance	
2:49:38 PM	00:24	Patriots Theater	Patriots Theater	Live Theater, Opera, Music, Dance	

Final Thoughts

- ❖ Public radio is in the book, but not having a big impact on the rankings so far
- ❖ Though the Cume and AQH figures are different from the diaries, many of the listening patterns appear to be the same
- ❖ Real time response data can provide insights on how listeners react to regular and major programming events





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