



# Public Radio Classical Audience

January 2017

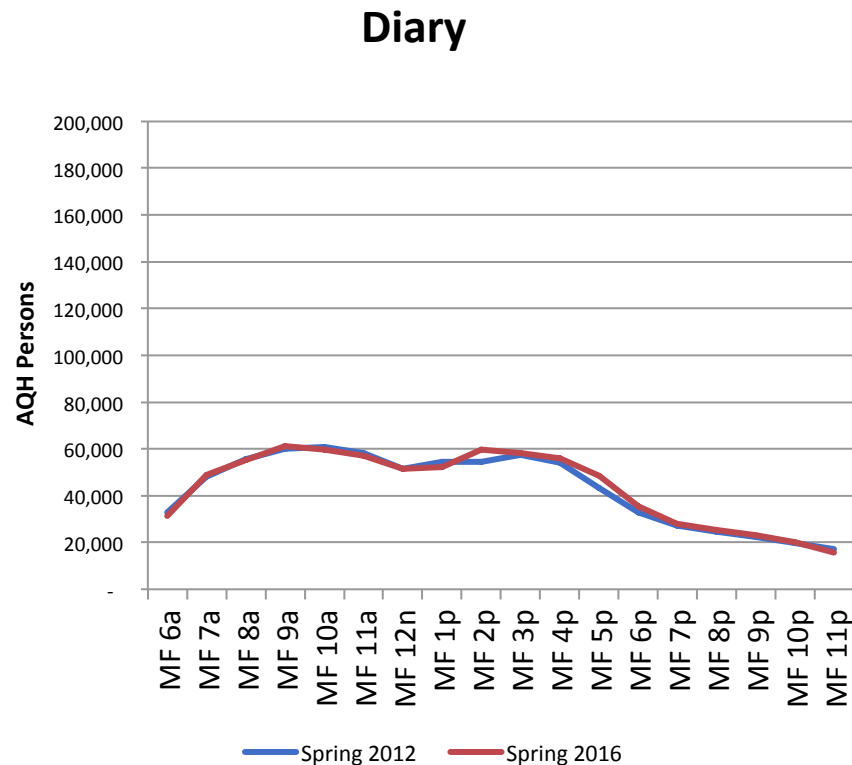
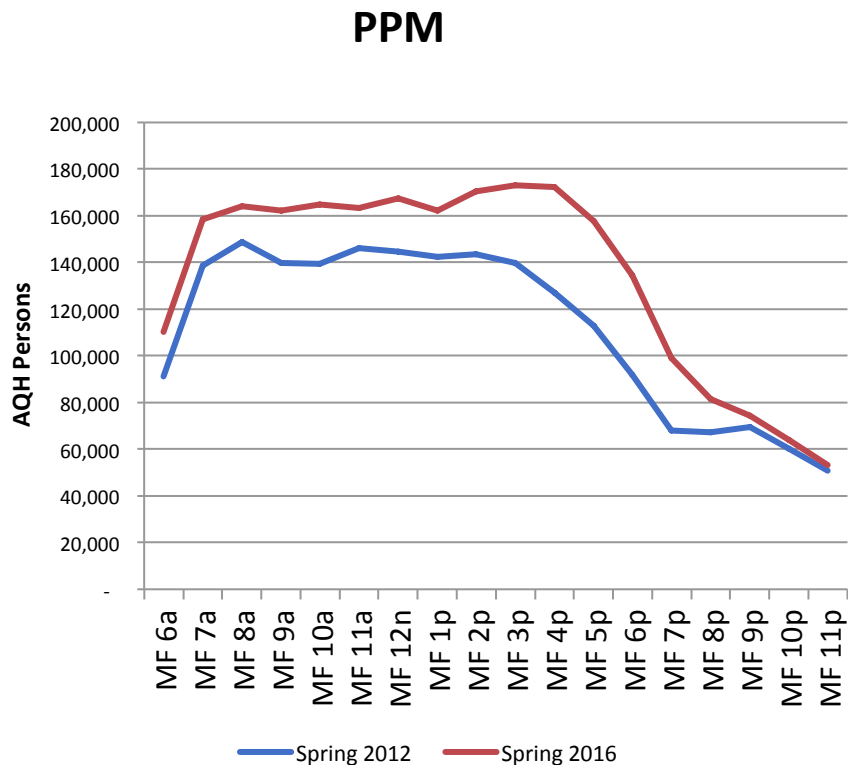
# Background & Executive Summary

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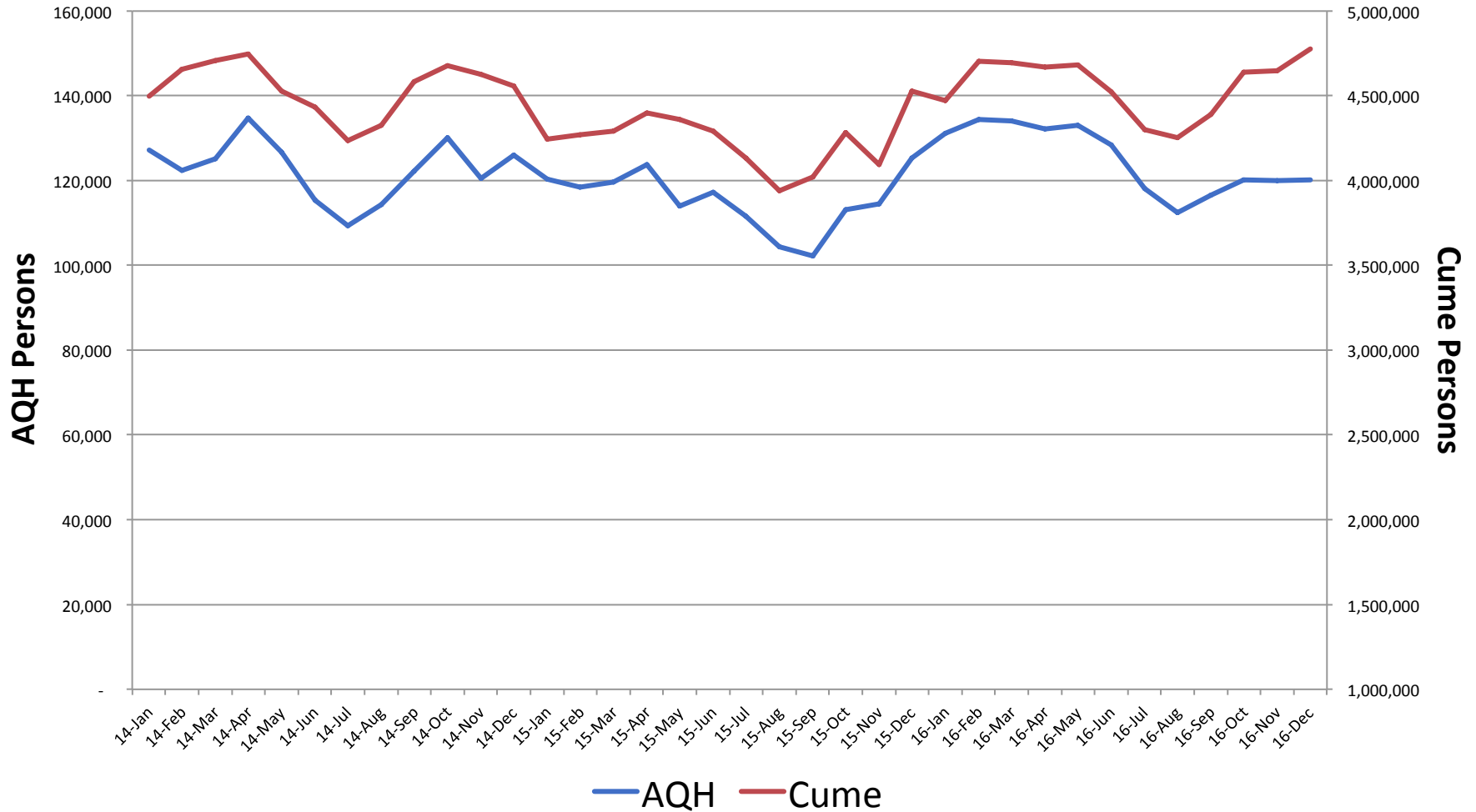
- On behalf of the Classical Music Rising project Scott Williams approached NPR to assess what NPR Audience Insights has learned from classical music stations in PPM markets that might apply to all markets.
- Using a Mon-Sun 6a-7p schedule, we identified 26 stations whose schedules consist at least 90% of classical music programming in PPM markets and 113 stations in diary metro markets.
- Classical music stations in PPM markets...
  - comprise a larger percentage of listening
  - Have seen significant growth in listening since 2012; the growth spans from 6a to midnight
  - These stations have experienced double digit percentage growth in cume and AQH since Spring 2012 across each major daypart (morning, midday, afternoon and evenings)
  - In terms of percent growth, the largest increases occurred in the MF 3p-7p daypart: (cume 16% and AQH 35%)
- Diary market stations ...
  - Have not seen dramatic listening growth. We see a slight bump between 2p and 7p
  - Have experienced a similar growth in cume listeners, but AQH growth is considerably more modest, and has been flat in the morning daypart and nearly flat in the midday.
- Time spent listening in PPM markets has grown over the past year, while it has declined in diary markets. That said, TSL is greater in diary markets, as one might expect using a diary methodology.
- Percent of audience that is P1 has remained fairly consistent in PPM and diary markets
- Listening to classical music stations in PPM and diary markets is growing in the 65+ demo.
- I would be hesitant to draw any listening conclusions in diary markets, given the vastly different AQH measures.
- Unlike news, classical music is able to sustain audience throughout the day.

# Classical PPM Stations have seen Hour-by-Hour Increases over since 2016

Classical diary stations' growth is less dramatic and occurs only after 2PM; the audience in diary metro is considerably smaller audience

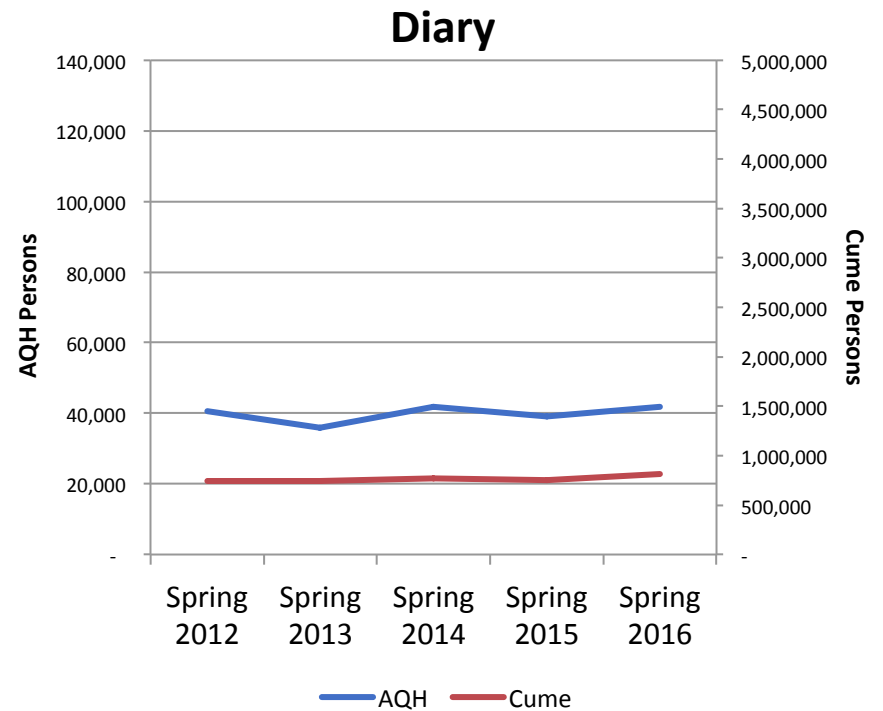
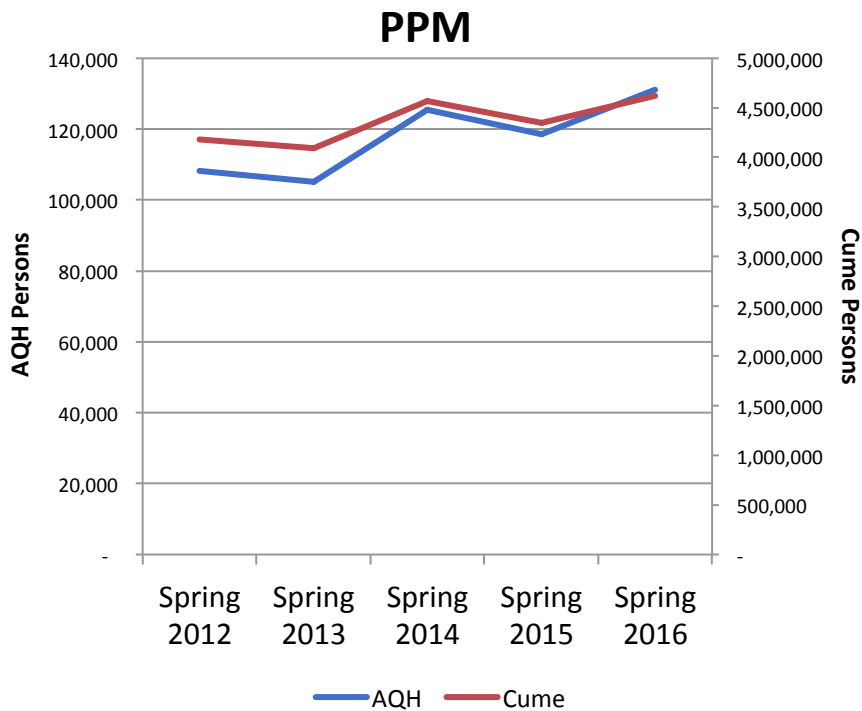


# Classical PPM Mon-Sun 6a-Midnight: Monthly Changes (no comparable Diary Analysis)



# Classical PPM Mon-Sun 6a-Midnight: Cume +11%; AQH +21%

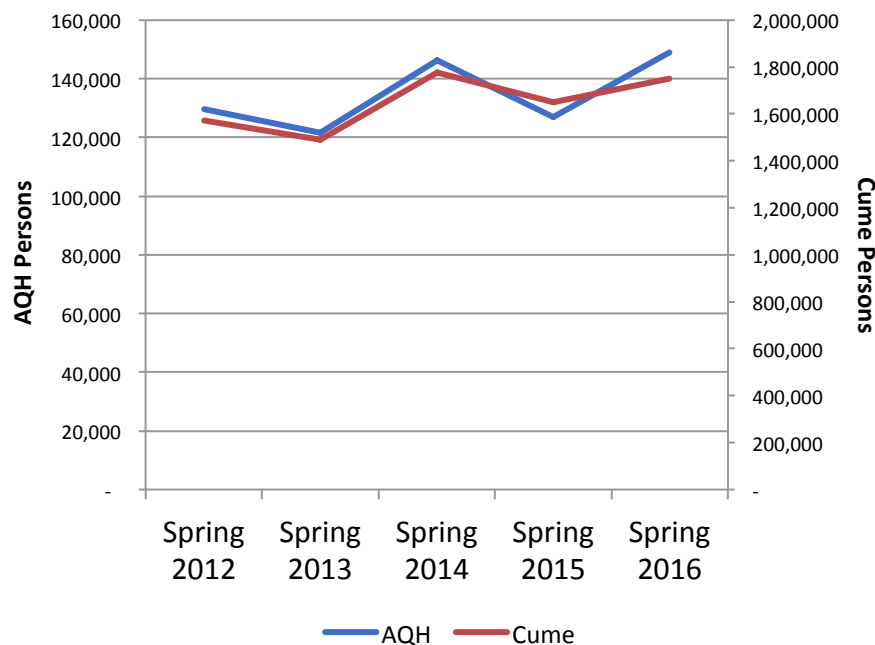
Classical Diary Mon-Sun 6a-Midnight: Cume increase similar; AQH less dramatic:  
Cume +10%; AQH +3%



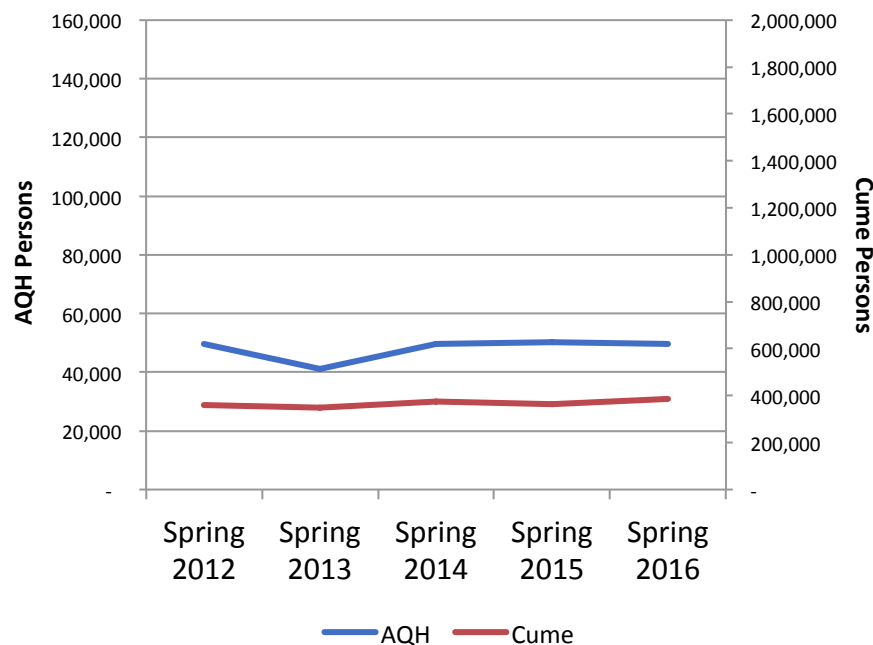
# Classical PPM Mon-Fri 6a-10a: Cume +11%; AQH +15%

Classical Diary Mon-Fri 6a-10a. Cume increase similar; AQH less dramatic. Cume +8%; AQH 0%

### PPM

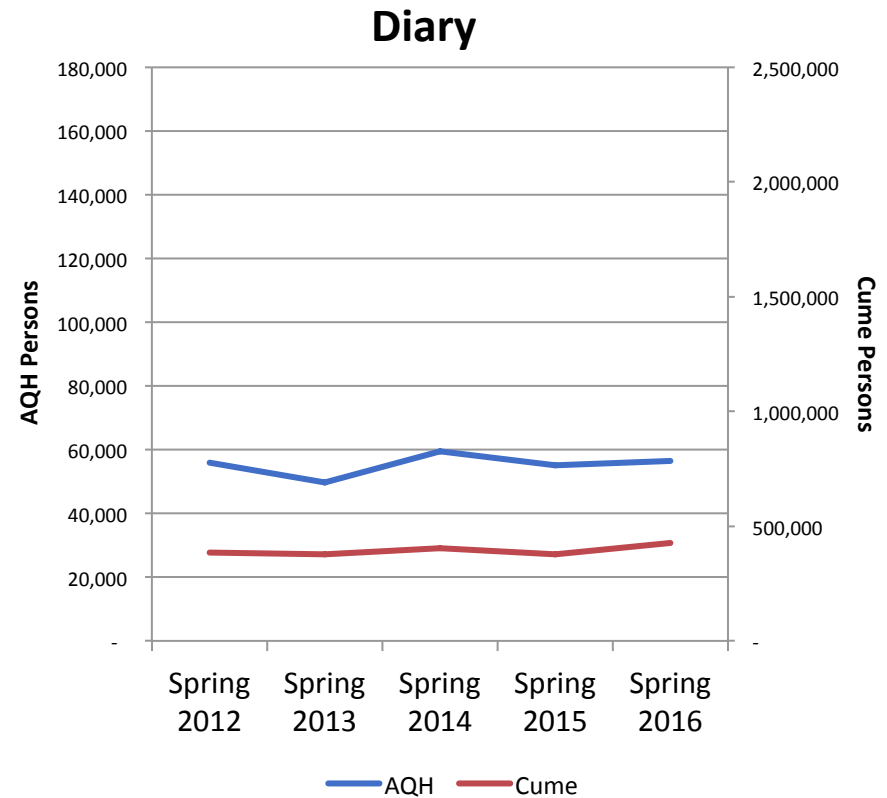
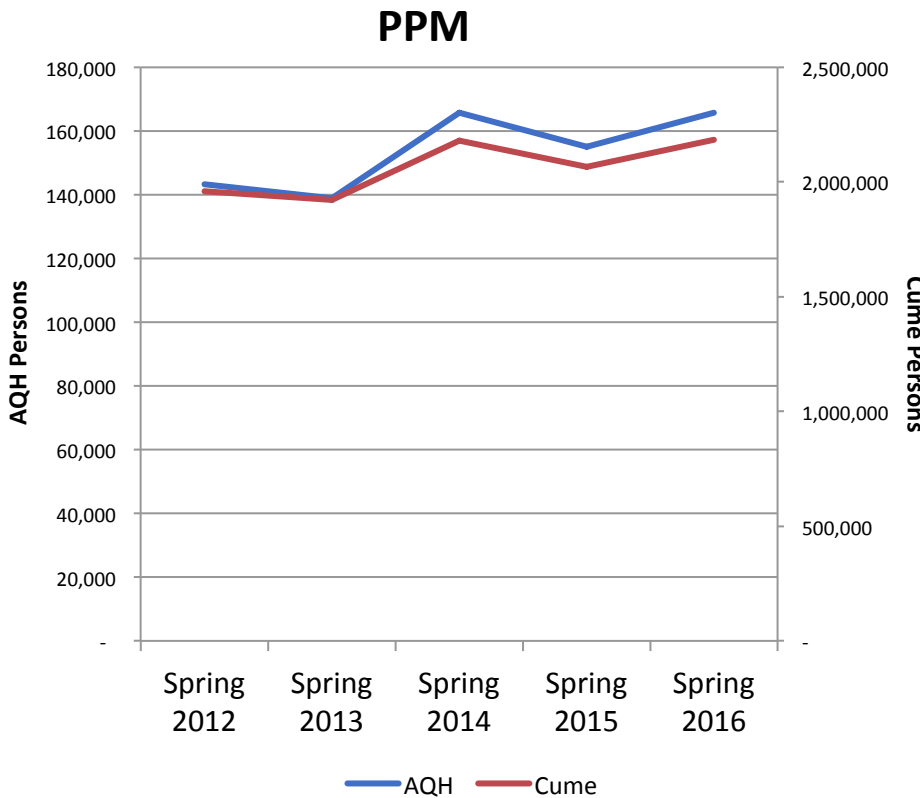


### Diary



# Classical PPM Mon-Fri 10a-3p: Cume +11%; AQH +16%

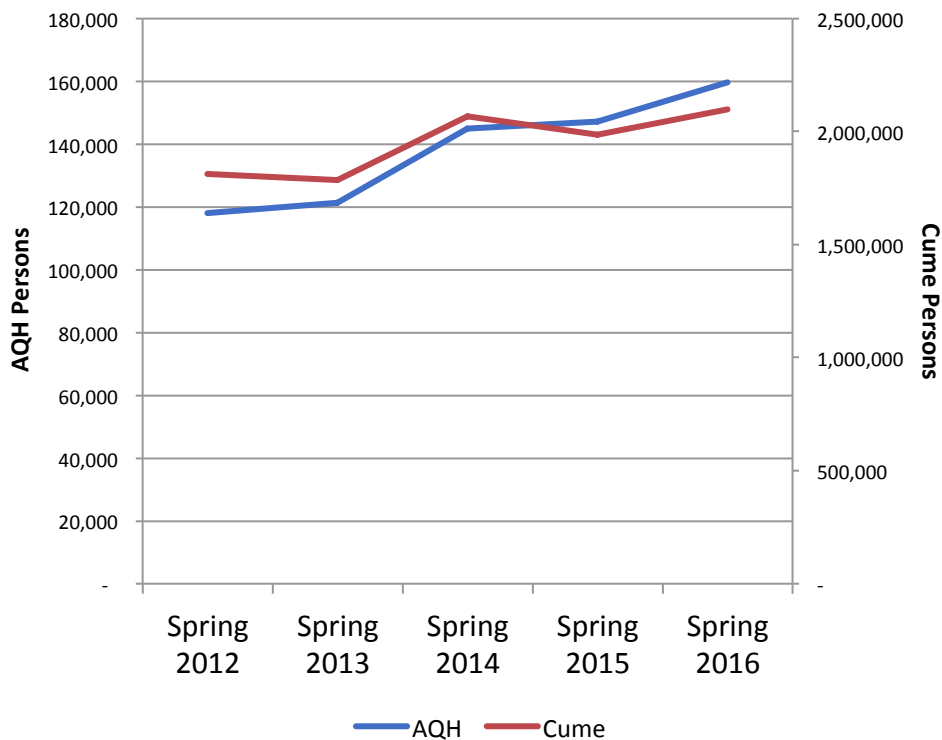
Classical Diary Mon-Fri 10a-3p. Cume increase similar; AQH less dramatic. Cume +10%; AQH +1%



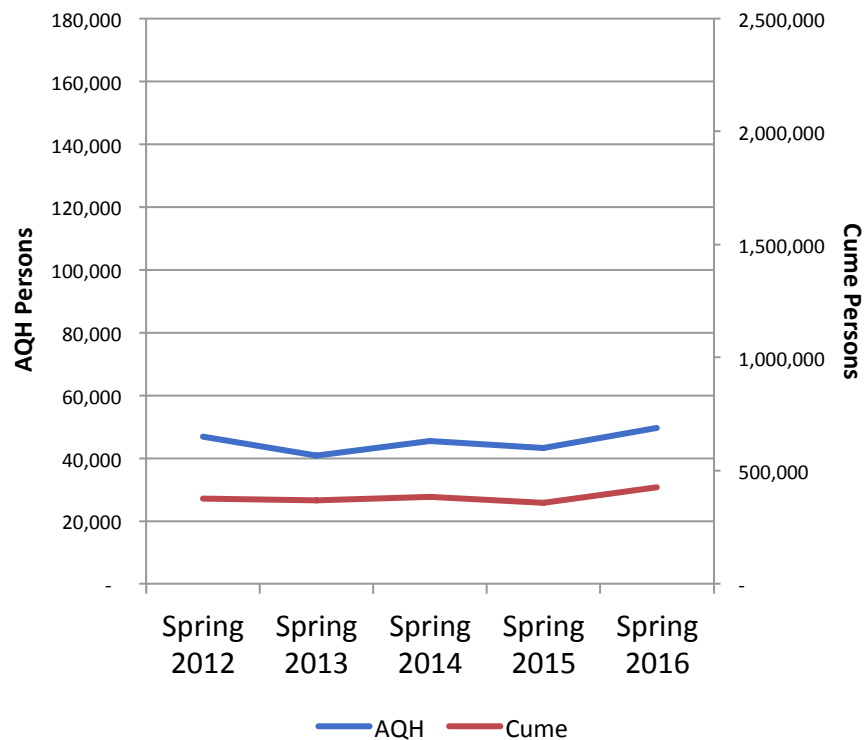
# Classical PPM Mon-Fri 3p-7p: Cume +16%; AQH +35%

Classical Diary Mon-Fri 3p-7p. Cume increase similar; AQH less dramatic. Cume +13%; AQH +6%

### PPM



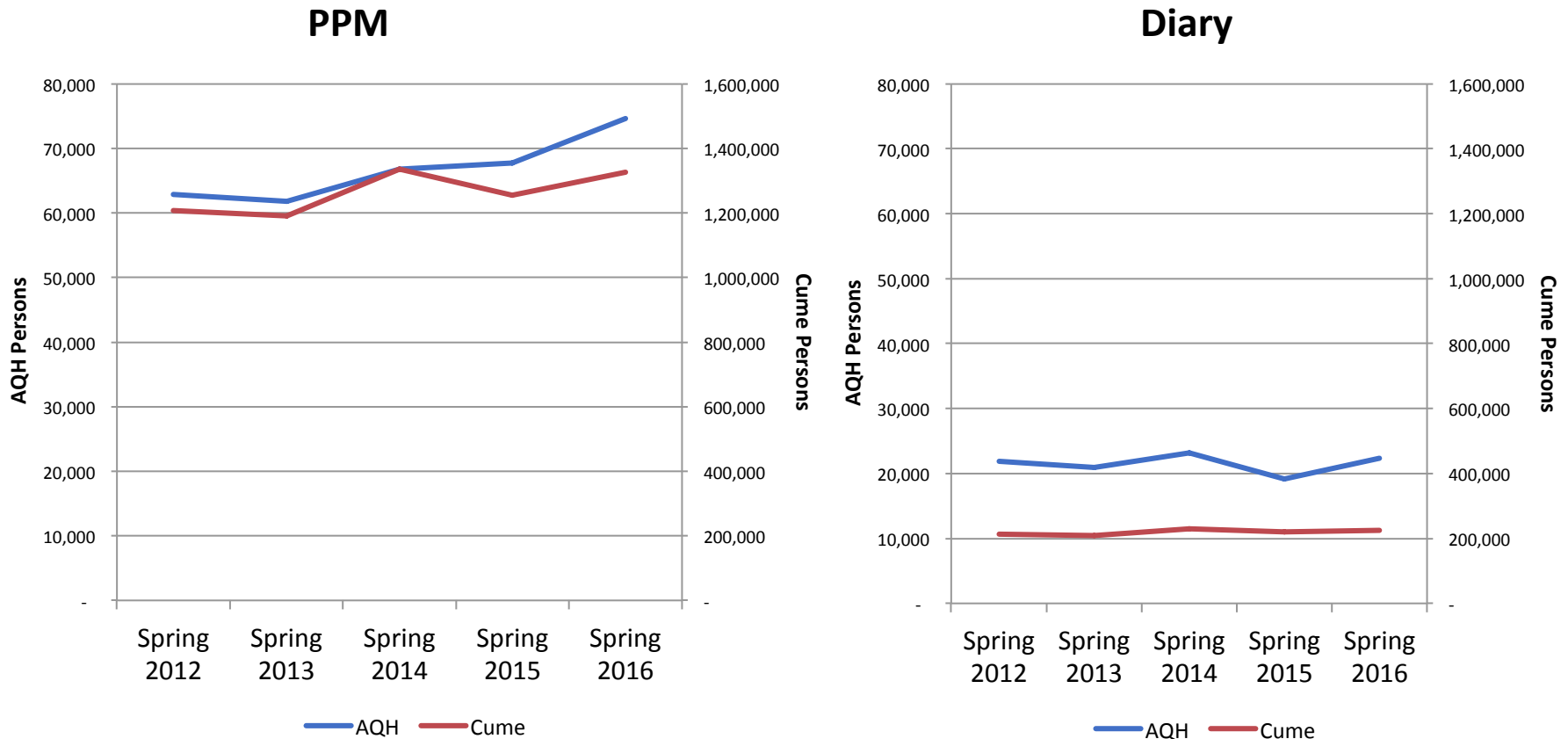
### Diary





# Classical PPM Mon-Fri 7p-12m: Cume +10%; AQH +19%

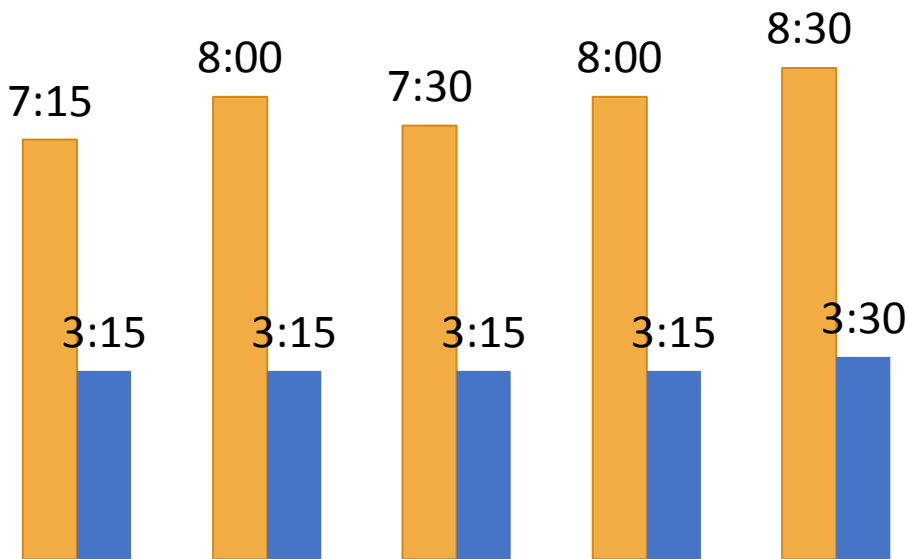
Classical Diary Mon-Fri 7p-12m. Cume increase similar; AQH less dramatic .Cume +6%; AQH +2%



# Classical TSL in PPM markets has increased in the past year

Classical TSL in Diary markets has decreased but listening time is longer than in PPM markets, as would be expected in light of diary methodology.

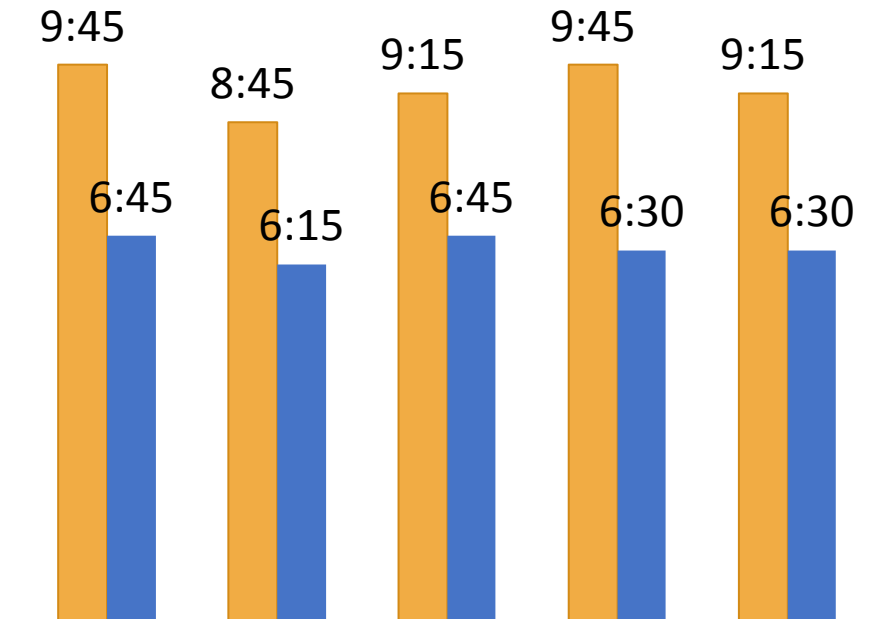
**PPM**



Spring 2012 Spring 2013 Spring 2014 Spring 2015 Spring 2016

■ TSL P1 ■ TSL Overall

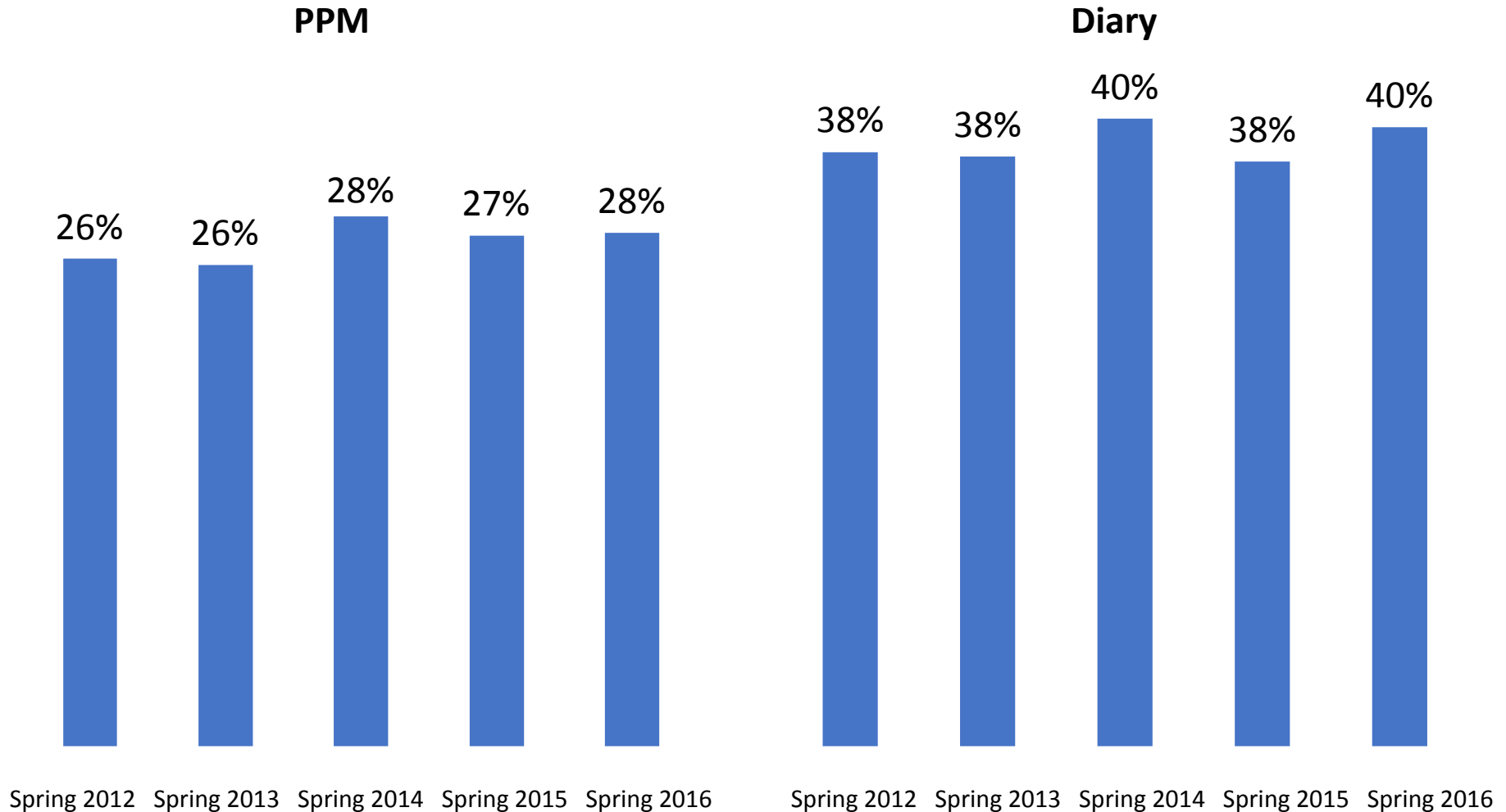
**Diary**



Spring 2012 Spring 2013 Spring 2014 Spring 2015 Spring 2016

■ TSL P1 ■ TSL Overall

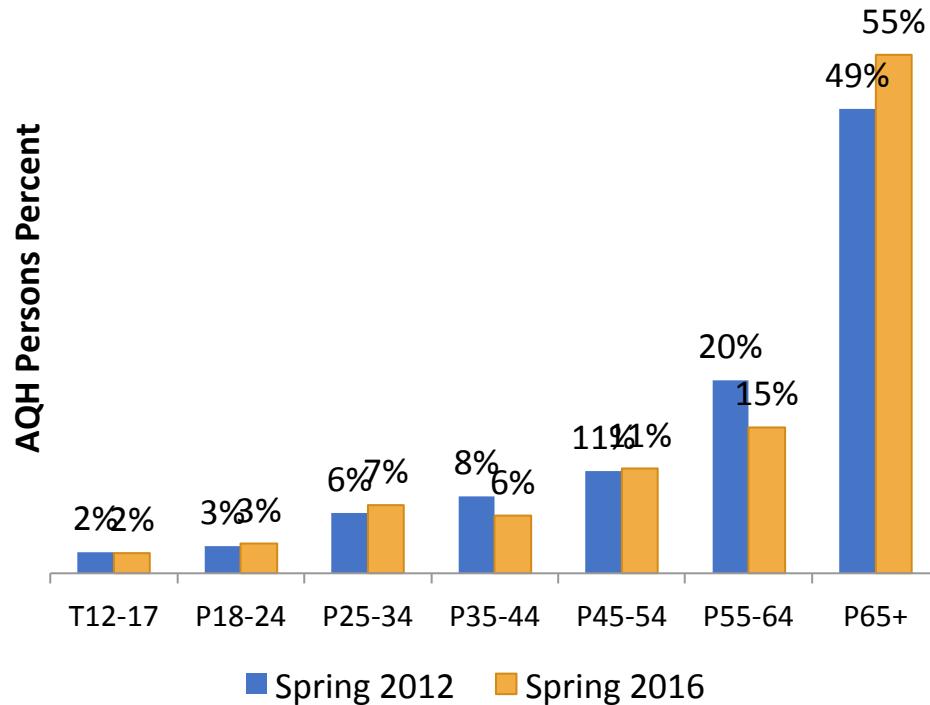
# Classical PPM and Diary: Percent P1 Audience fairly stable



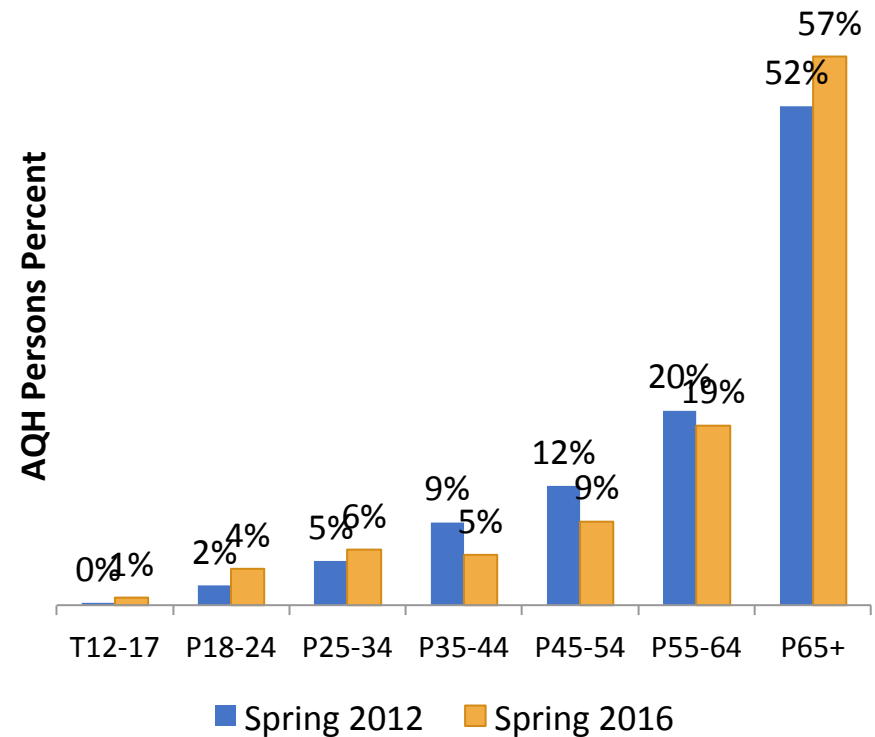
Source: © 2017. The Nielsen company. All rights reserved. Nielsen PPM data via Act 1 Systems. 26 stations, AQH Persons, P 12+, Spring 2016

# Listeners to Classical PPM and Diary stations, growing among 65+

PPM



Diary



## Stations in the study

	PPM Stations	City	State	Associated diary stations	
The sample includes 26 “flagship” stations in metered markets (PPM) which are analyzed separately.	KBAQ	Phoenix	AZ		
	KBYU	Salt Lake City	UT		
	KCNV	Las Vegas	NV		
	KDFC	San Francisco	CA	KOSC, KXSC	
	KING	Seattle	WA		
	KMFA	Austin	TX		
	KPAC	San Antonio	TX		
	KQAC	Portland	OR	KQHR, KQOC	
	There are 48 stations in diary markets associated with these PPM “flagships.” These stations are analyzed together with other diary market stations on the following page.	KSJN	St Paul	MN	KRSU, KCRB, KBPR, KSJR, WSCD, KCMF, WMLS, WGRH, KCCM, KLSE, KGAC, QQMN, WIRR, KRSW, KRSD, KLCD, KWRV
		KUSC	Los Angeles	CA	KDB, KDSC, KESC, KPSC
KVOD		Denver	CO	KVOV, KPRU, KCFP	
KXPR		Sacramento	CA	KXJS, KXSR	
WBJC		Baltimore	MD		
WCLV		Cleveland	OH		
WCPE		Raleigh	NC	WZPE, WBUX, WURI	
WCRB		Boston	MA		
WDAV		Charlotte	NC		
WETA		Washington	DC	WGMS	
WFCL		Nashville	TN		
WGUC		Cincinnati	OH		
WHRO		Norfolk	VA	WHRF, WHRJ	
WOSA		Columbus	OH	WOSB, WOSE, WOSP, WOSV	
WQED		Pittsburgh	PA	WQEJ	
WQXR		New York	NY	WQXW	
WRCJ		Detroit	MI		
WRTI		Philadelphia	PA	WRTX, WRTQ, WRTJ, WRTL, WJAZ, WRTY	

## Stations in the study

There are 31 “flagship stations” in diary markets, with an additional 34 associated stations, also in diary markets.

These 65 stations, together with the 48 stations associated with PPM “flagships” on the previous page, are the diary market sample.

Diary Stations	City	State	Associated diary stations
KBSU	Boise	ID	KBSM
KCME	Colorado Springs	CO	KMPZ
KLRE	Little Rock	AR	
KSUI	Iowa City	IA	KHKE, KICJ, KICW, KICP, KICG, KICL
KUAT	Tucson	AZ	
KUCO	Oklahoma City	OK	KBCW, KCSC
KUWY	Laramie	WY	KZUW
KVNO	Omaha	NE	
KWAX	Eugene	OR	KWVZ, KWRX
KWTU	Tulsa	OK	
WAUS	Berrien Springs	MI	
WBNI	Fort Wayne	IN	
WCNH	Concord	NH	
WCNY	Syracuse	NY	WJNY, WUNY
WDPR	Dayton	OH	WDPG
WEMC	Harrisonburg	VA	
WFSQ	Tallahassee	FL	WFSL
WFYB	Portland	ME	
WIAA	Interlochen	MI	WIAB, WICV
WIPR	San Juan	PR	
WKYL	Richmond	KY	
WMHT	Albany	NY	WRHV
WMNR	Monroe	CT	WGRS, WGSK, WRXC
WNED	Buffalo	NY	WNJA
WNIU	Rockford	IL	
WOXR	Burlington	VT	WVTI, WVNK, WOXM, WVXM, WNCH, WVXR, WVTQ
WSMC	Chattanooga	TN	
WSMR	Sarasota	FL	
WUOL	Louisville	KY	
WWFM	West Windsor	NJ	WWCJ, WWNJ, WWPJ
WXXI	Rochester	NY	