



Spring Survey Trends

Non-Commercial Formats

The Survey Period

The Spring survey period for Arbitron data is represented by a 3-month average in PPM markets

April / May / June

The Markets

30 markets have been measured by Arbitron's PPM service since Spring 2010

Atlanta, Baltimore, Boston, Chicago, Cincinnati, Cleveland, Dallas-Ft. Worth, Denver-Boulder, Detroit, Houston-Galveston, Kansas City, Las Vegas, Los Angeles, Miami-Ft. Lauderdale-Hollywood, Minneapolis-St Paul, New York, Philadelphia, Phoenix, Pittsburgh, PA, Portland, OR, Riverside-San Bernardino, Sacramento, Salt Lake City-Ogden-Provo, San Antonio, San Diego, San Francisco, Seattle-Tacoma, St. Louis, Tampa-St. Petersburg-Clearwater, Washington, DC



The Stations

The following stations have maintained the same format for the last four Spring survey periods and have been included in this report:

- **32 Full-time NPR News/Talk/Information**

KALW-FM; KCFR-FM; KCPW-FM; KCUR-FM; KERA-FM; KJZZ-FM; KNOW-FM; KNPR-FM; KOPB-FM; KPBS-FM; KPCC-FM; KQED-FM; KQEI-FM; KSTX-FM; KUER-FM; KUOW-FM; KVCR-FM; KWMU-FM; KXJZ-FM; WAMU-FM; WBEZ-FM; WBUR-FM; WCPN-FM; WDET-FM; WGBH-FM; WHYI-FM; WLRN-FM; WNYC-AM; WNYC-FM; WUOM-FM; WVXU-FM; WYPR-FM

- **25 Religious (mixed formats)**

KCBI-FM; KFLR-FM; KJNW-FM; KJRN-FM; KLDV-FM; KLJY-FM; KSBJ-FM; KSGN-FM; KSOS-FM; KTIS-AM; KTIS-FM; WBVM-FM; WBYO-FM; WCIE-FM; WCRF-FM; WFTI-FM; WGTS-FM; WJIS-FM; WKES-FM; WMBI-AM; WMBI-FM; WONU-FM

- **18 Full-time Classical**

KBAQ-FM; KBYU-FM; KCVN-FM; KPAC-FM; KQAC-FM; KSJN-FM; KUSC-FM; KVOD-FM; KXPR-FM; WBJC-FM; WCRB-FM; WETA-FM; WGUC-FM; WKCP-FM; WQED-FM; WQXR-FM; WRCJ-FM; WRTI-FM

- **9 Full-time Jazz**

KBEM-FM; KKJZ-FM; KMHD-FM; KMOJ-FM; KSDS-FM; KUVO-FM; WBGO-FM; WDCB-FM; WDNA-FM

- **12 Full-time AAA**

KCMP-FM; KEXP-FM; KKXT-FM; KRCL-FM; KUOM-AM; WFUV-FM; WNKU-FM; WRAS-FM; WTMD-FM; WUMB-FM; WXPB-FM; WYEP-FM



The Demos

Four demos have been broken out for this analysis:

- Persons 12+
- Persons 12+ - P1
- Persons 25+ w/ College Degree
- Persons 25+ w/ College Degree – P1

The Estimates

PUMM%

- Persons Using Measured Media (Persons 6+)
- The sum of AQH listening for all stations in the market/analysis

AVG Weekly Cume Persons

- The total number of listeners reached on average each week

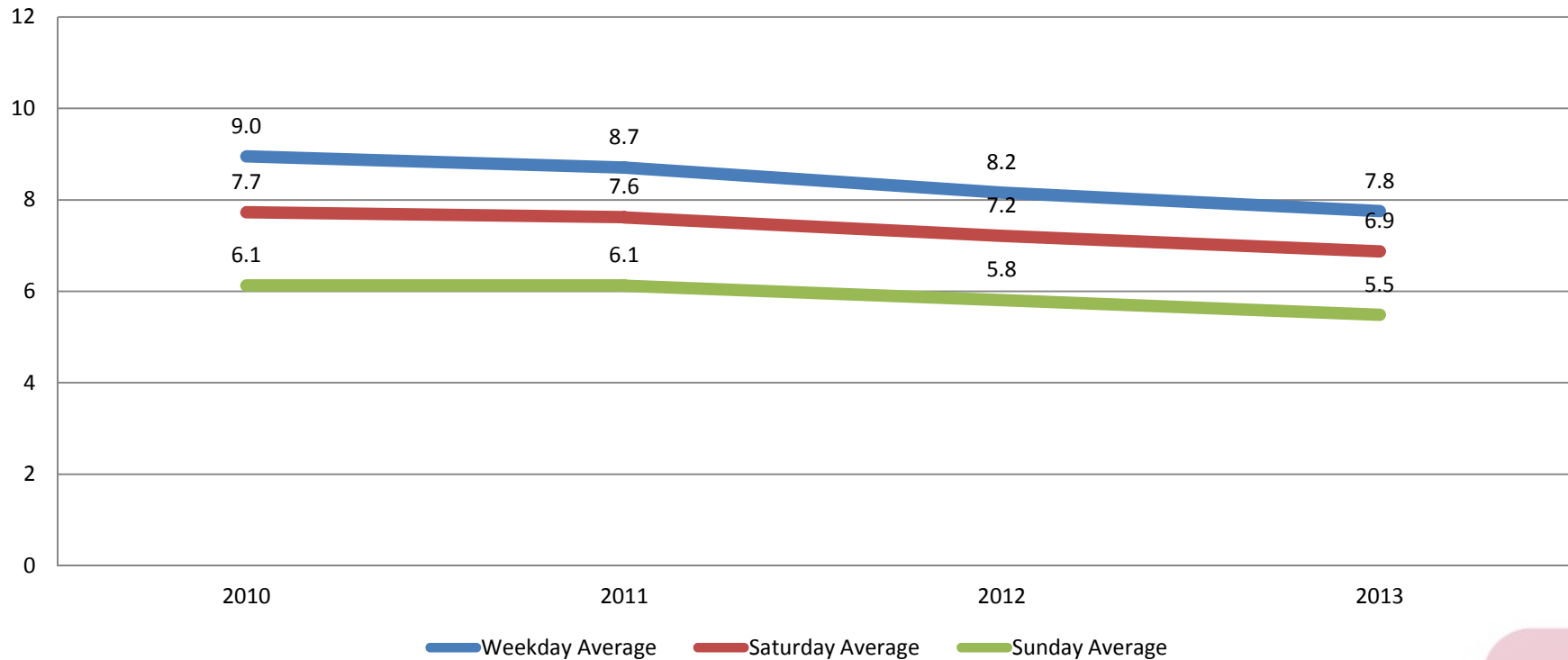
AQH Persons

- The estimated number of people listening on average at any given time



Across Weekdays, Saturdays and Sundays, total radio listening is in a steady decline between Spring 2010 and Spring 2013

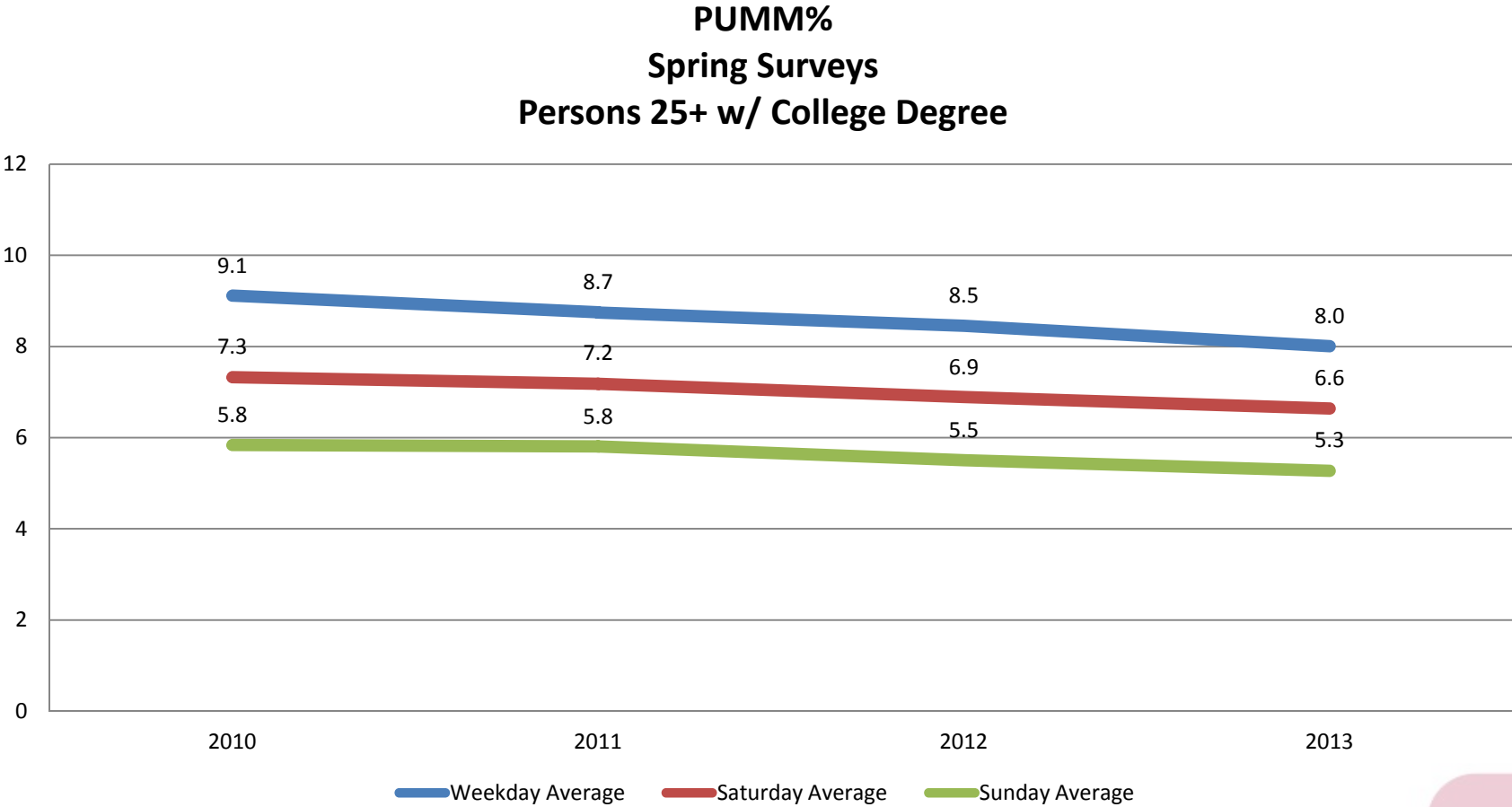
PUMM%
Spring Surveys
Persons 6+



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College graduate listening, which is important to many non-commercial radio formats, is also in a steady decline

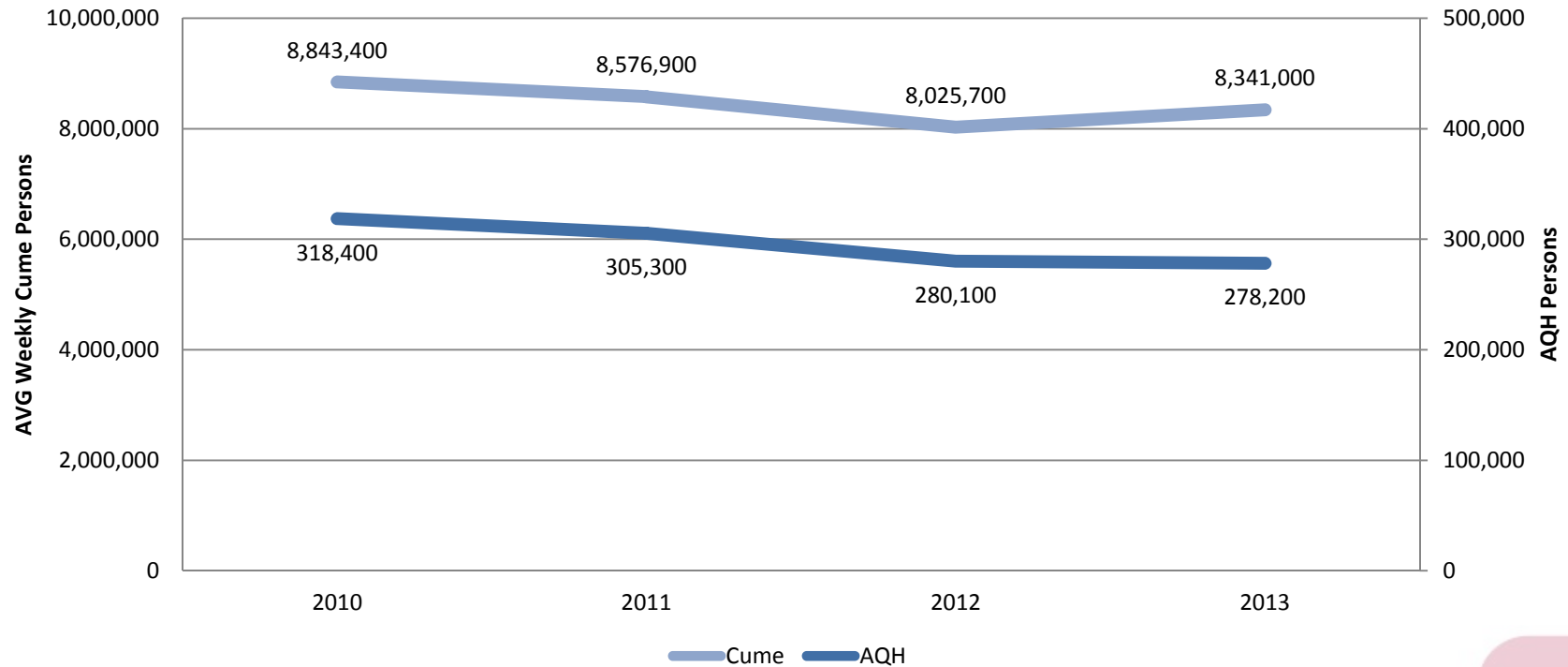


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Although Cume for News stations increased in 2013, the Average Quarter-Hour Persons estimate still showed a slight decline

32 Full-Time NPR News/Talk/Information Stations Spring Surveys Persons 12+

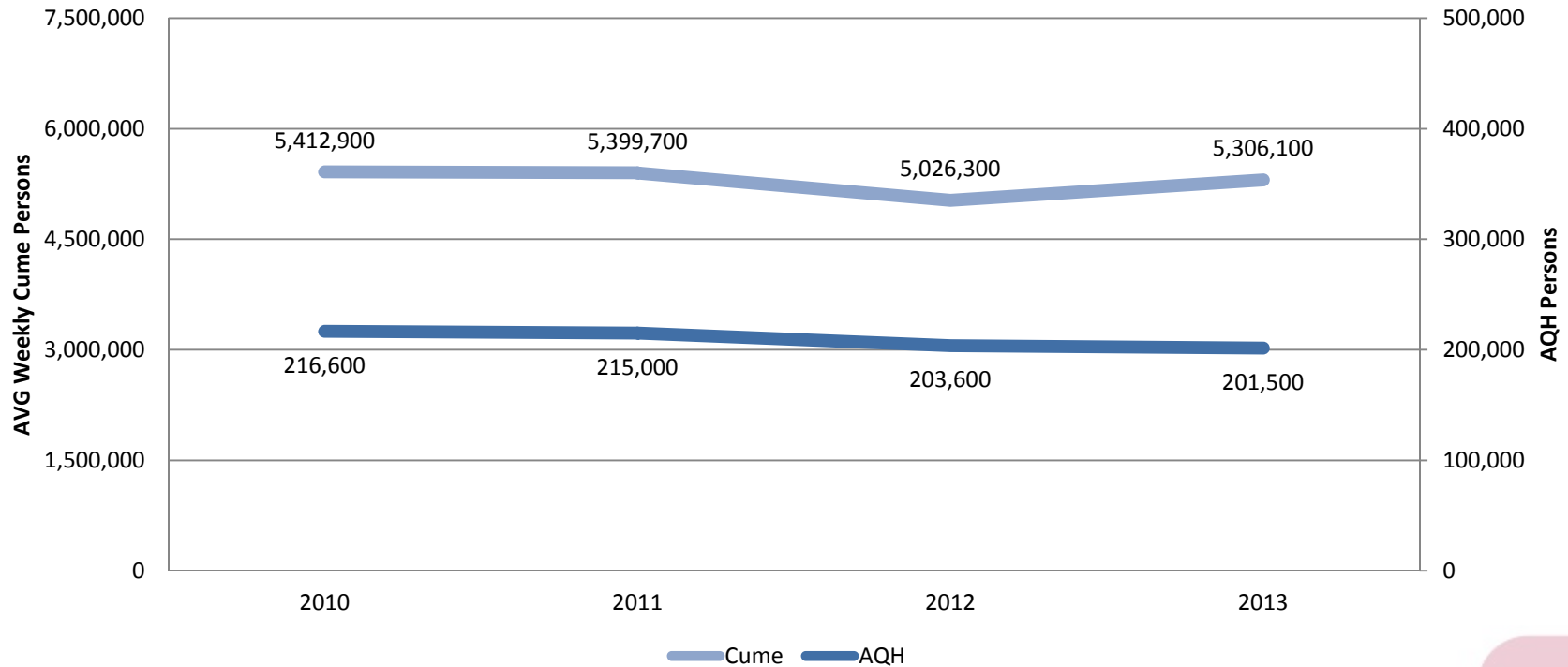


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Despite an increase in the number of College graduates listening to News in 2013, the Average Quarter-Hour Persons estimate still dropped slightly

**32 Full-Time NPR News/Talk/Information Stations
Spring Surveys
Persons 25+ w/ College Degree**

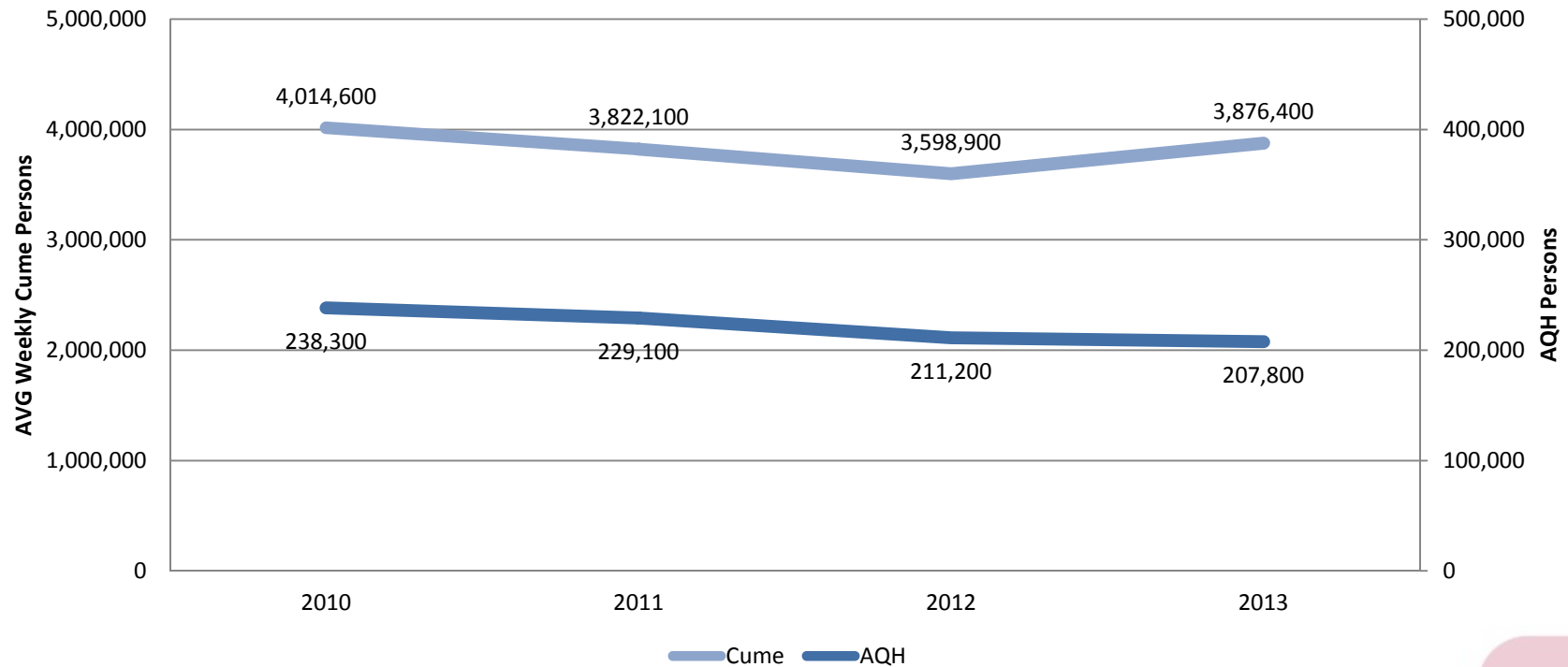


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Among P1 (First Preference) listeners, AQH Persons fell while Cume increased

32 Full-Time NPR News/Talk/Information Stations Spring Surveys Persons 12+ - P1

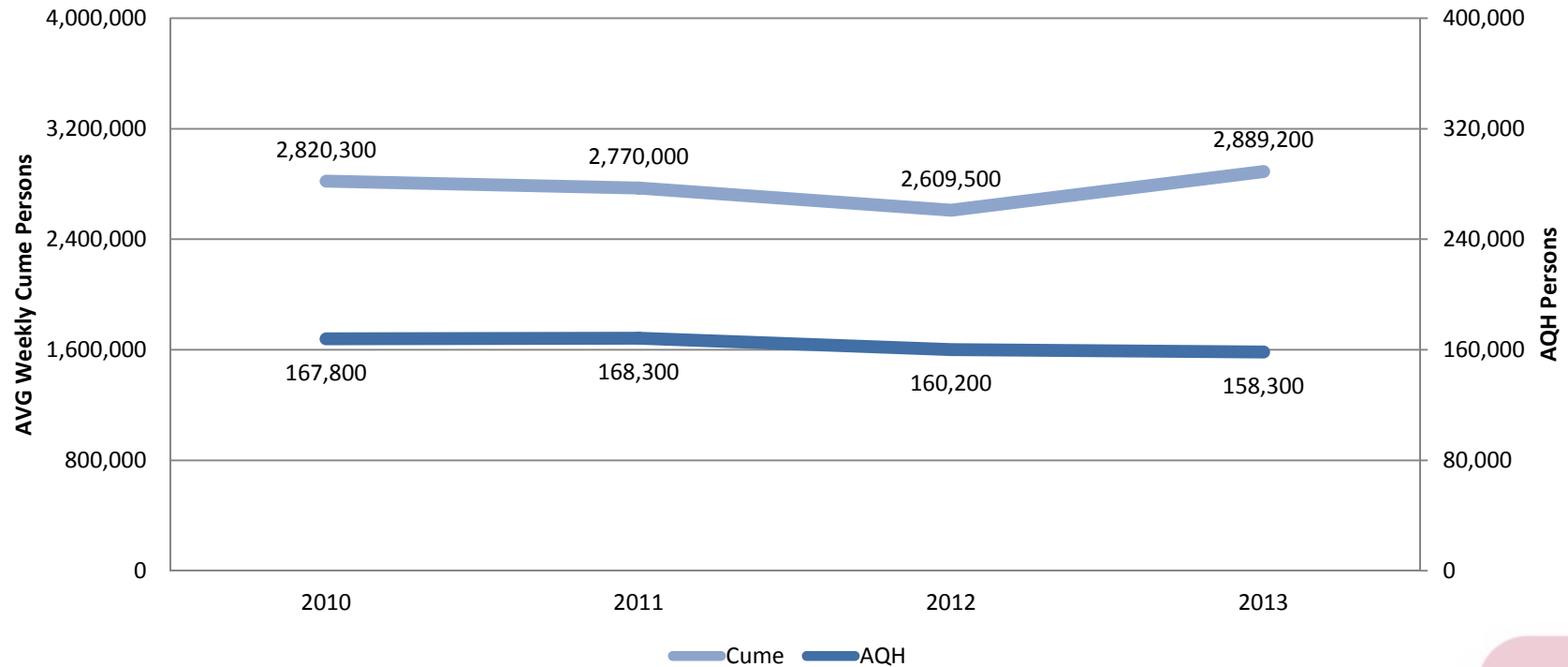


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The highlight for News stations may be the four-year high in AVG Weekly Cume for College Graduates - who are P1 to the format

32 Full-Time NPR News/Talk/Information Stations Spring Surveys Persons 25+ w/ College Degree - P1

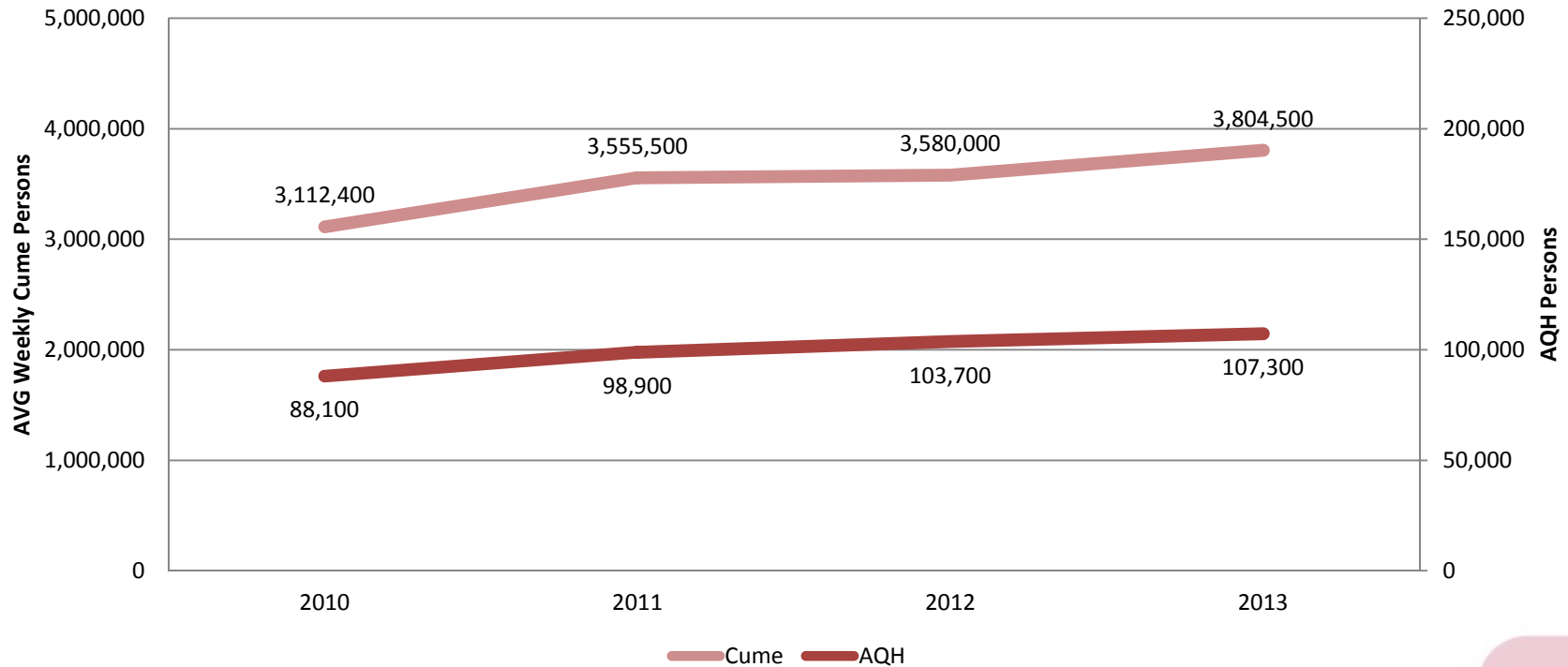


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Religious stations (Contemporary Christian, spoken word and others) have grown in both Cume and AQH over the last four years

**25 Religious Stations (multiple formats)
Spring Surveys
Persons 12+**

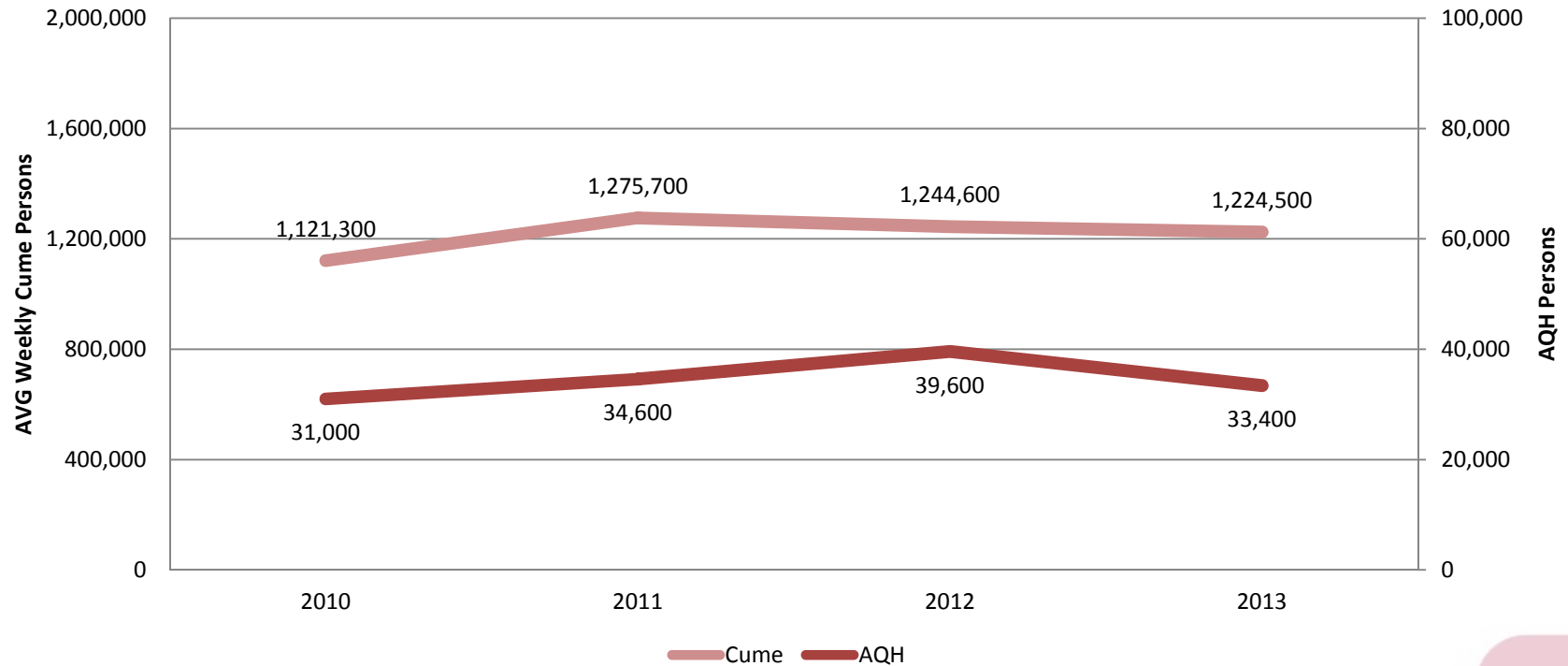


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College graduates who listen to Religious stations fell off slightly, while AQH declined at a faster pace

**25 Religious Stations (multiple formats)
Spring Surveys
Persons 25+ w/ College Degree**

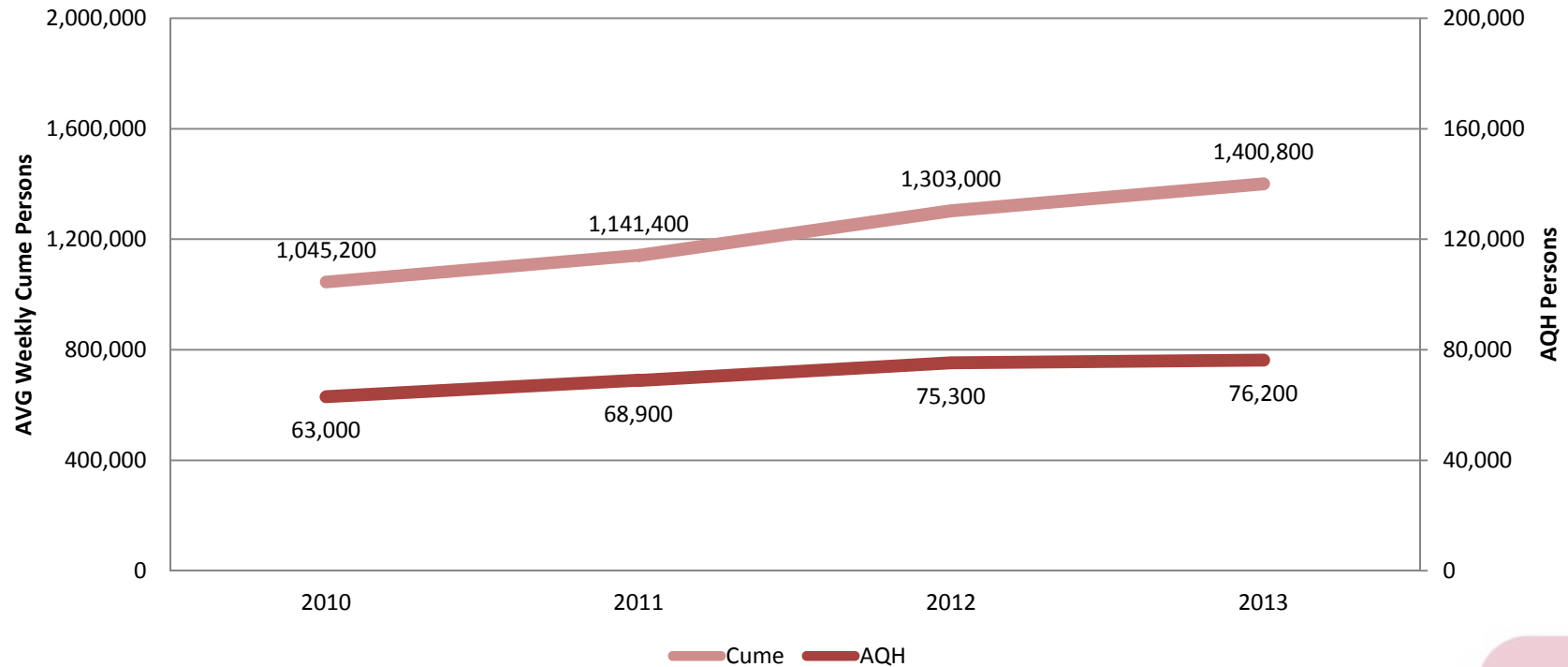


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First Preference (P1) listeners to Religious stations increased steadily over the past four years; AQH was fairly flat

**25 Religious Stations (multiple formats)
Spring Surveys
Persons 12+ - P1**

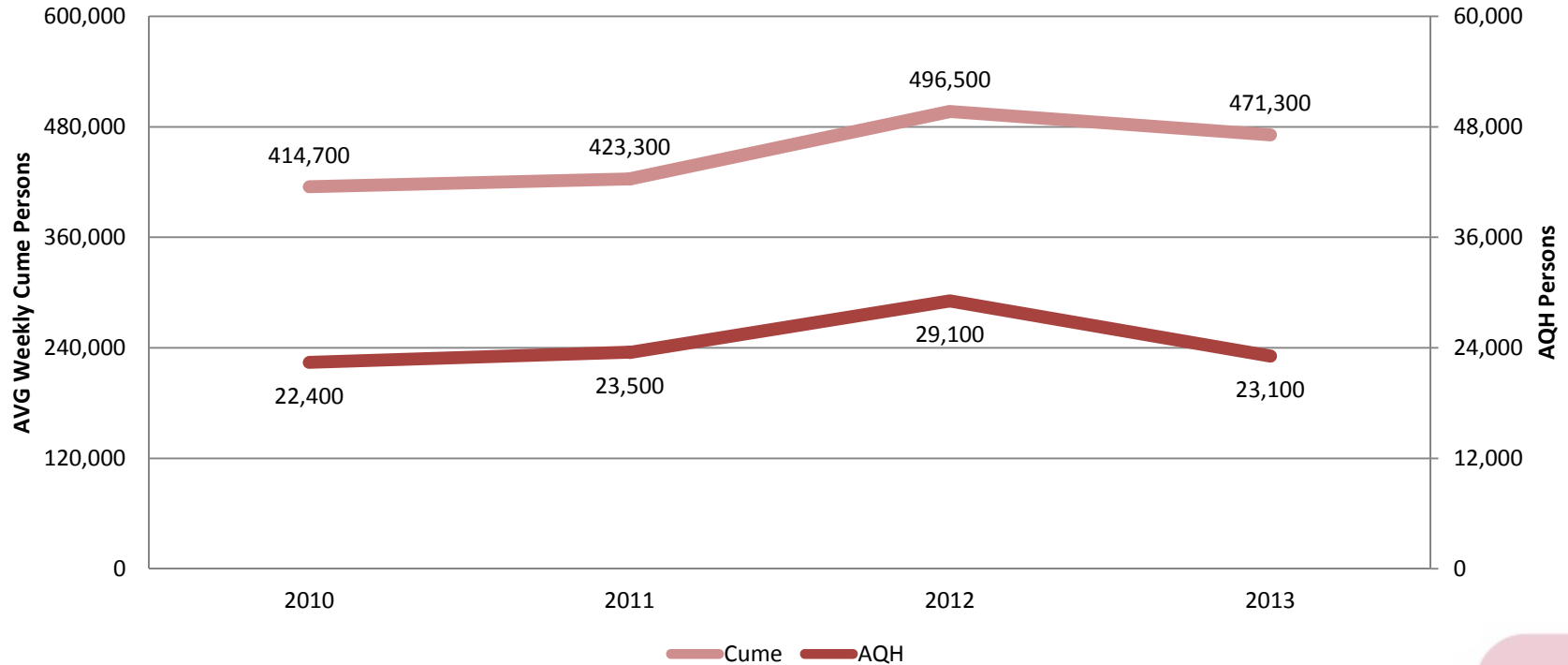


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For the first time in four years, P1 College graduates and their listening to Religious stations dropped

**25 Religious Stations (multiple formats)
Spring Surveys
Persons 25+ w/ College Degree - P1**

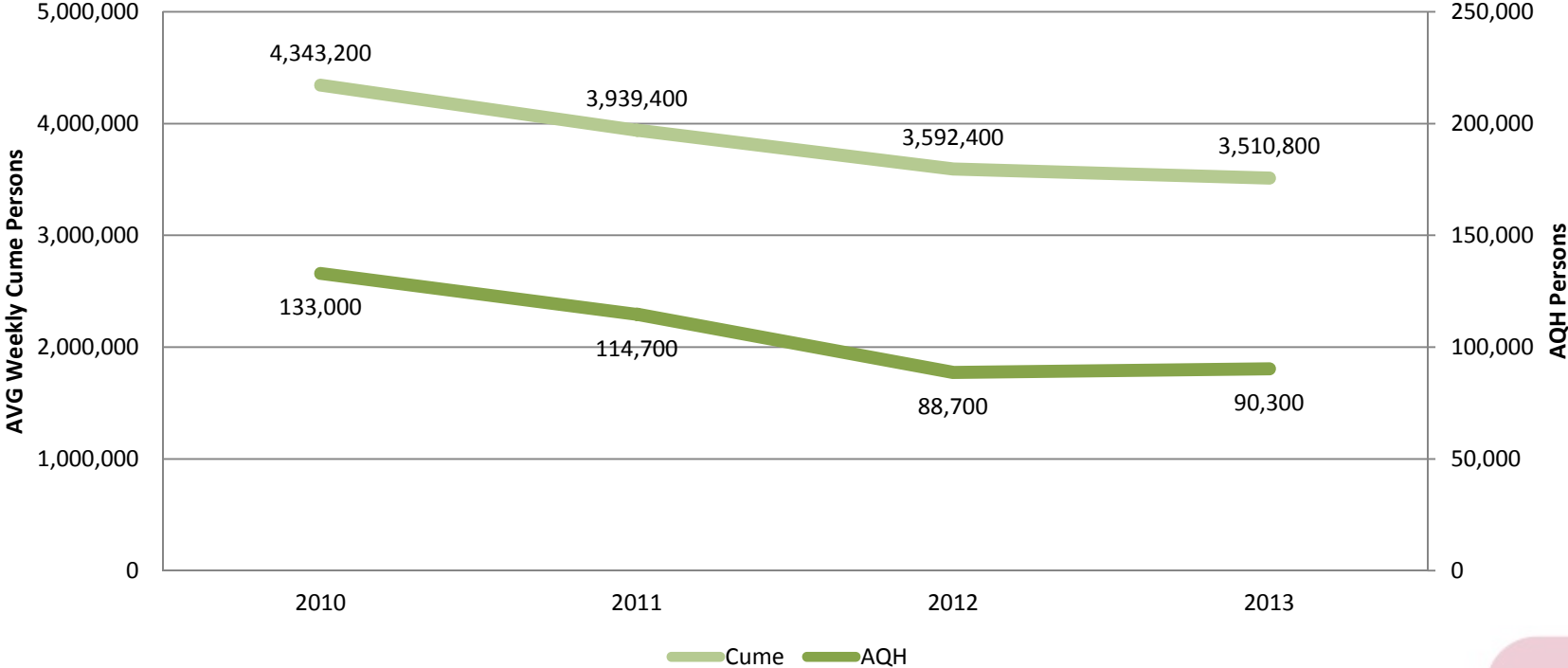


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Weekly Cume for Classical stations decreased for three straight years while AQH listening was flat after two years of decline

18 Full-Time Classical Stations Spring Surveys Persons 12+

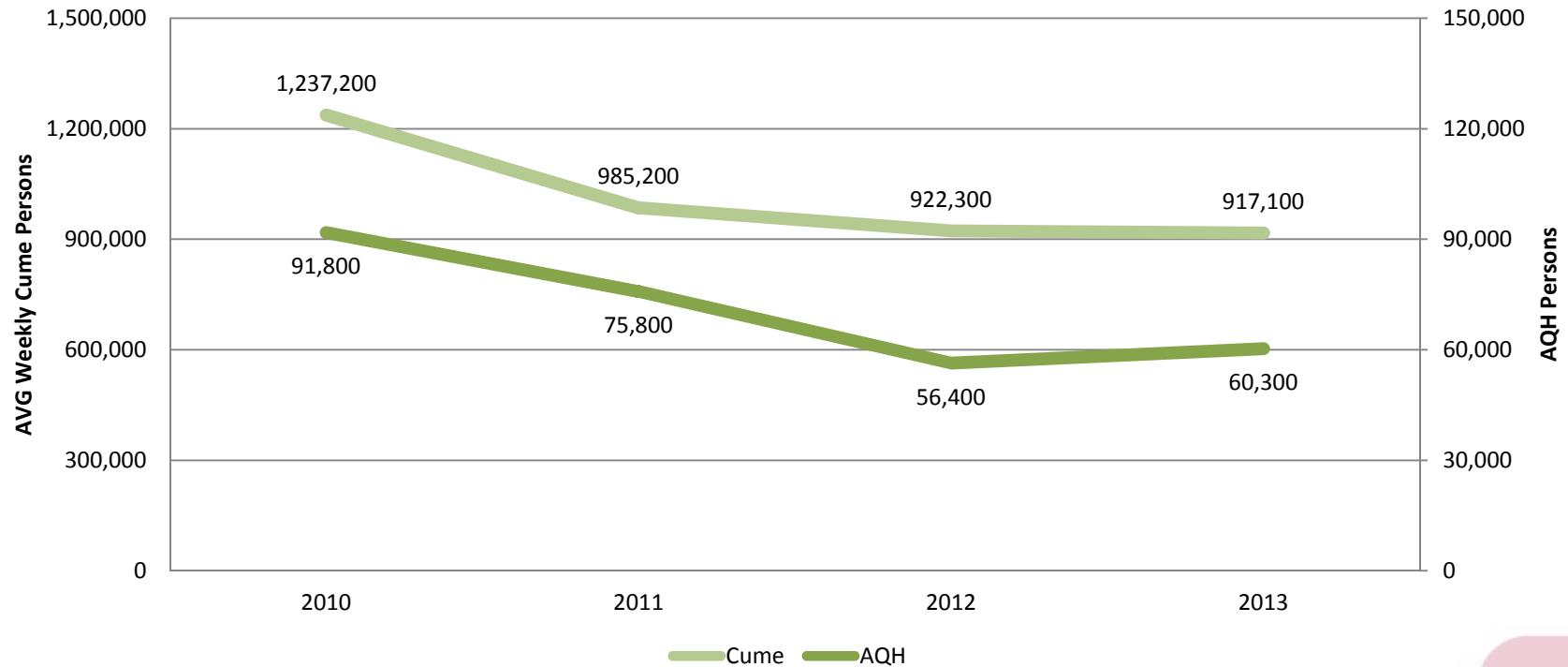


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AQH listening by the P1 audience jumped slightly while the Cume continued to fall

**18 Full-Time Classical Stations
Spring Surveys
Persons 12+ - P1**

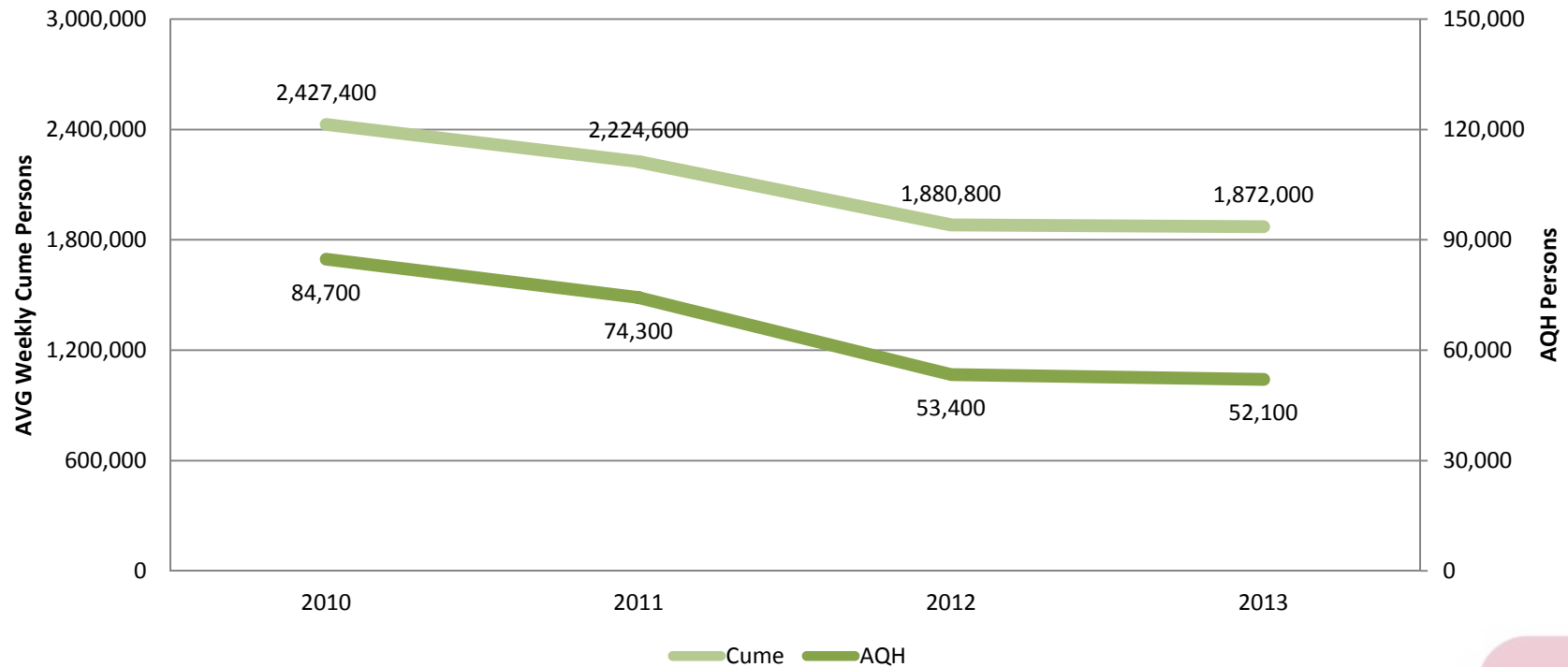


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College Graduates and their listening to Classical stations parallel one another over the past four years

**18 Full-Time Classical Stations
Spring Surveys
Persons 25+ w/ College Degree**

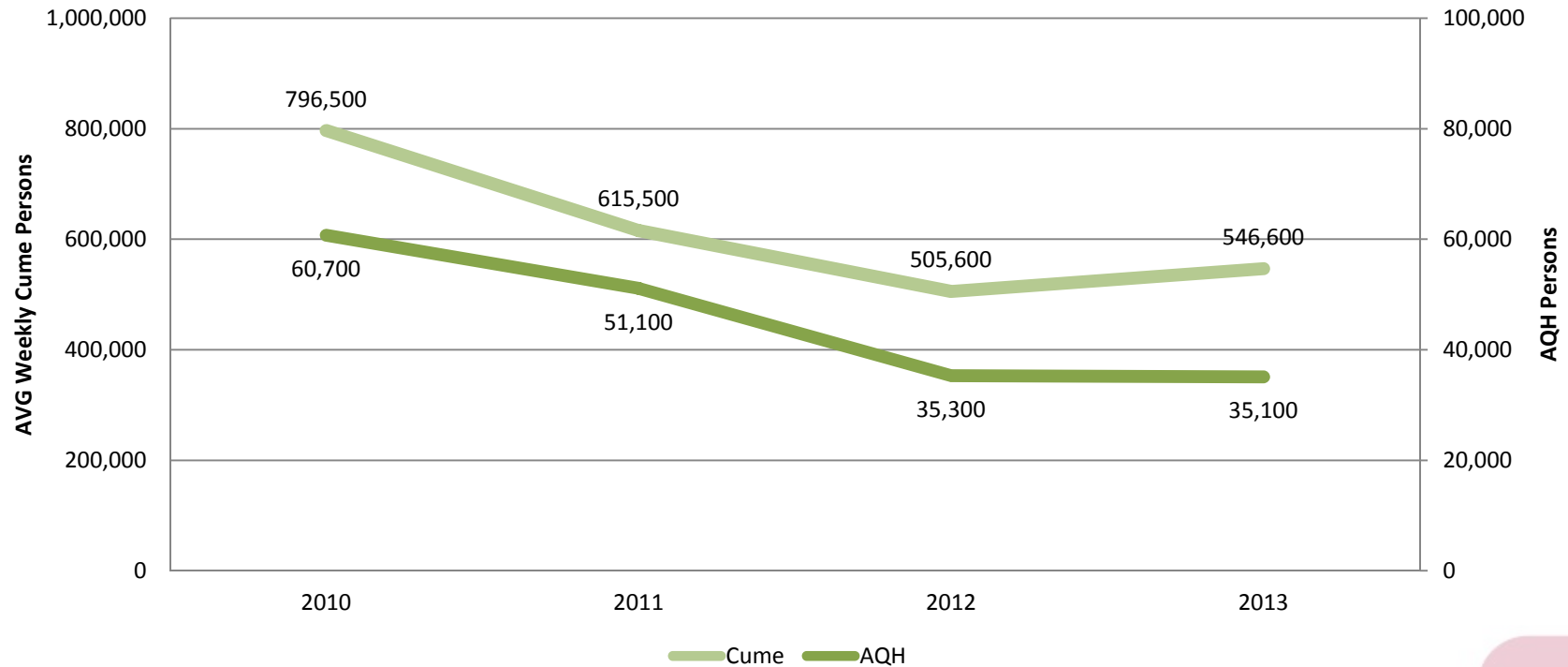


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The number of P1 College graduates listening to Classical stations increased this year while AQH was flat

**18 Full-Time Classical Stations
Spring Surveys
Persons 25+ w/ College Degree - P1**

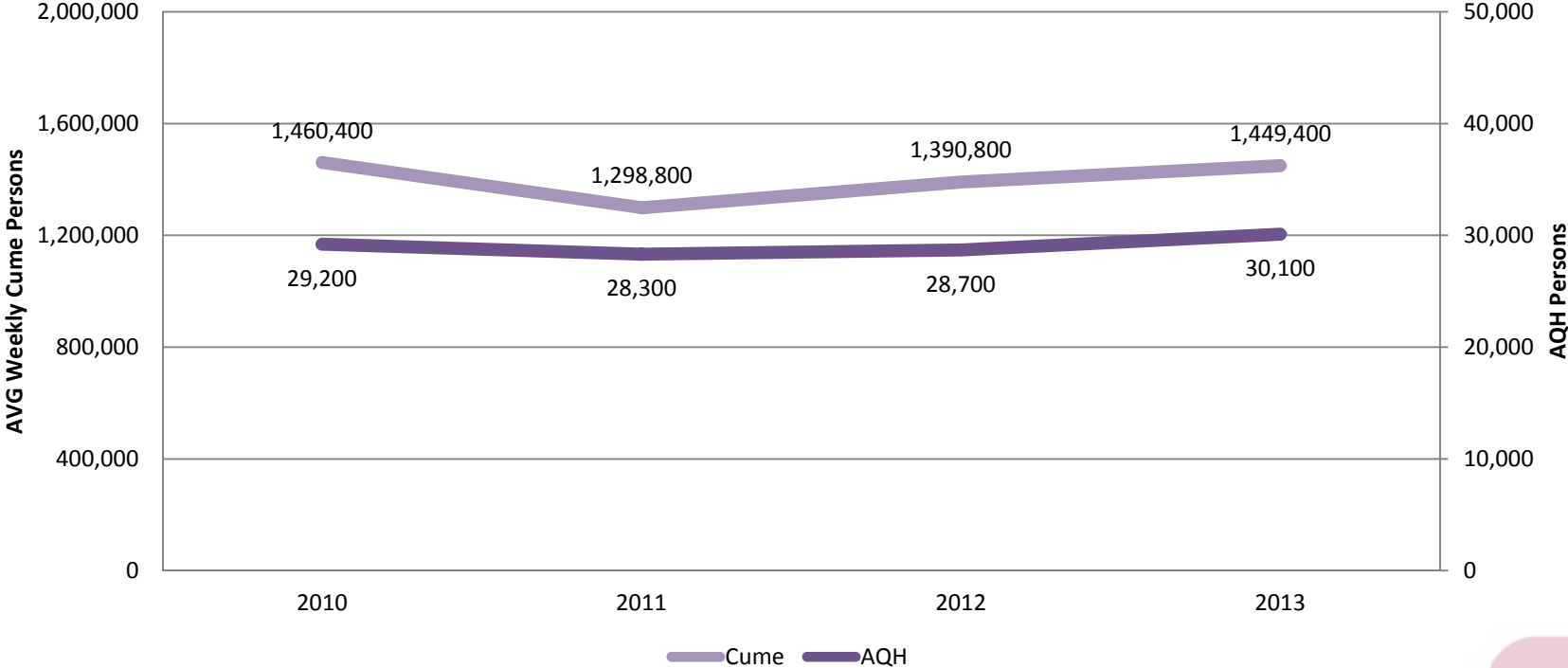


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Cume and AQH for Jazz stations grew for the second year in a row

**9 Full-Time Jazz Stations
Spring Surveys
Persons 12+**

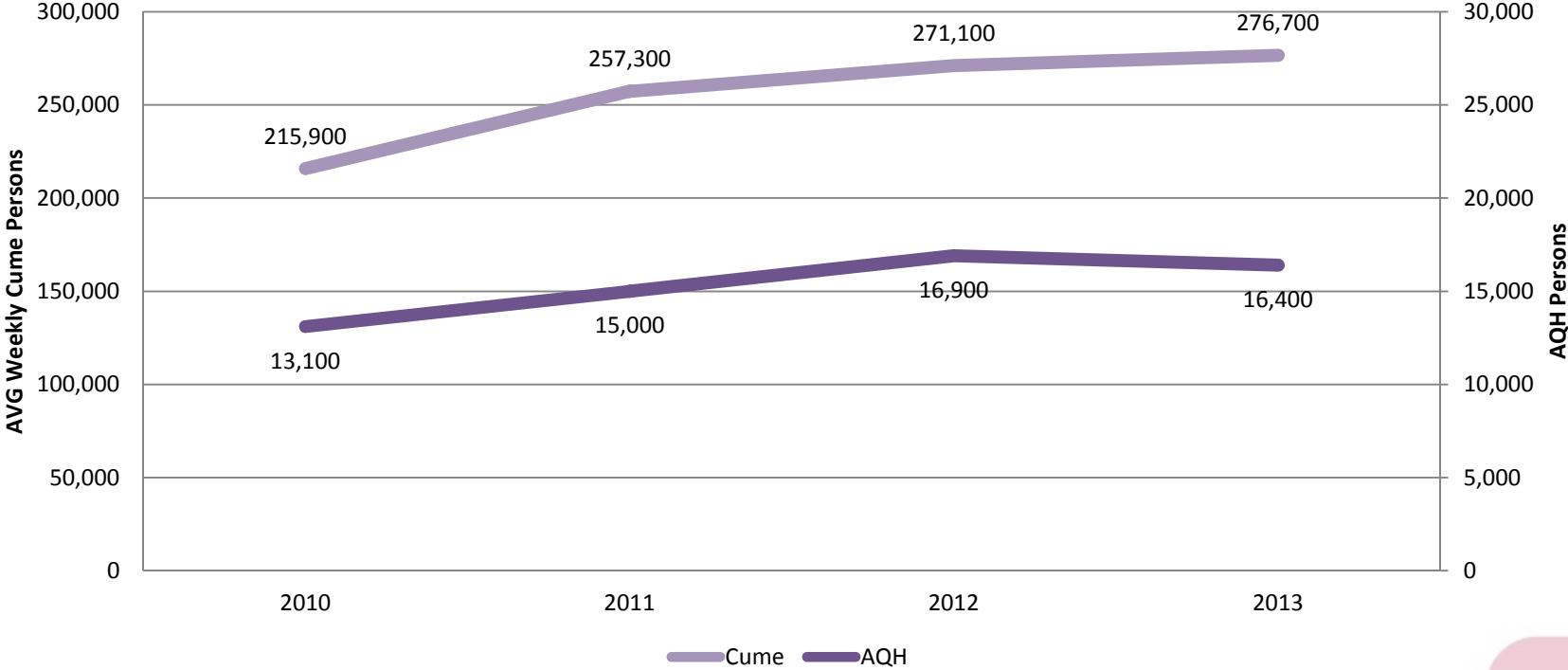


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P1 Cume for Jazz stations continued to increase while AQH fell slightly

9 Full-Time Jazz Stations Spring Surveys Persons 12+ - P1

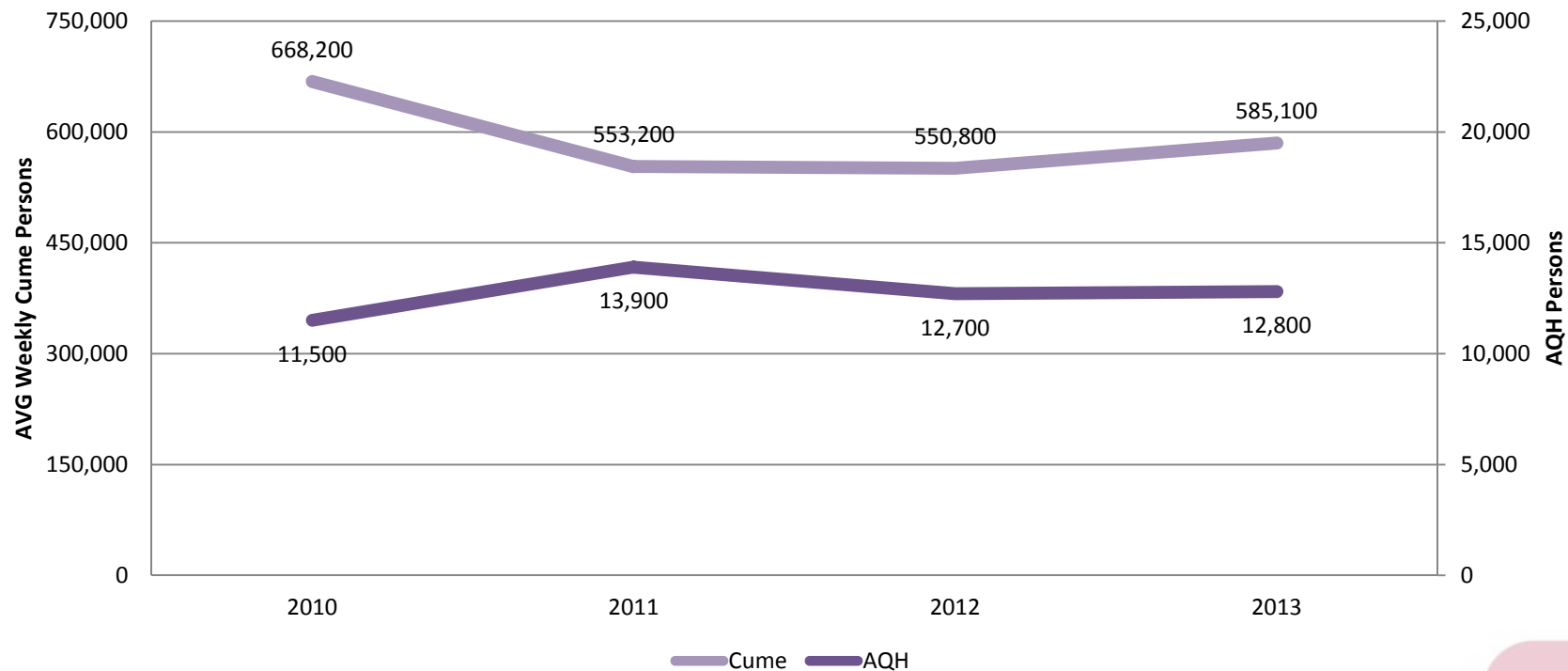


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The trend for College Graduates listening to Jazz is relatively flat despite a recent increase in listeners

9 Full-Time Jazz Stations Spring Surveys Persons 25+ w/ College Degree

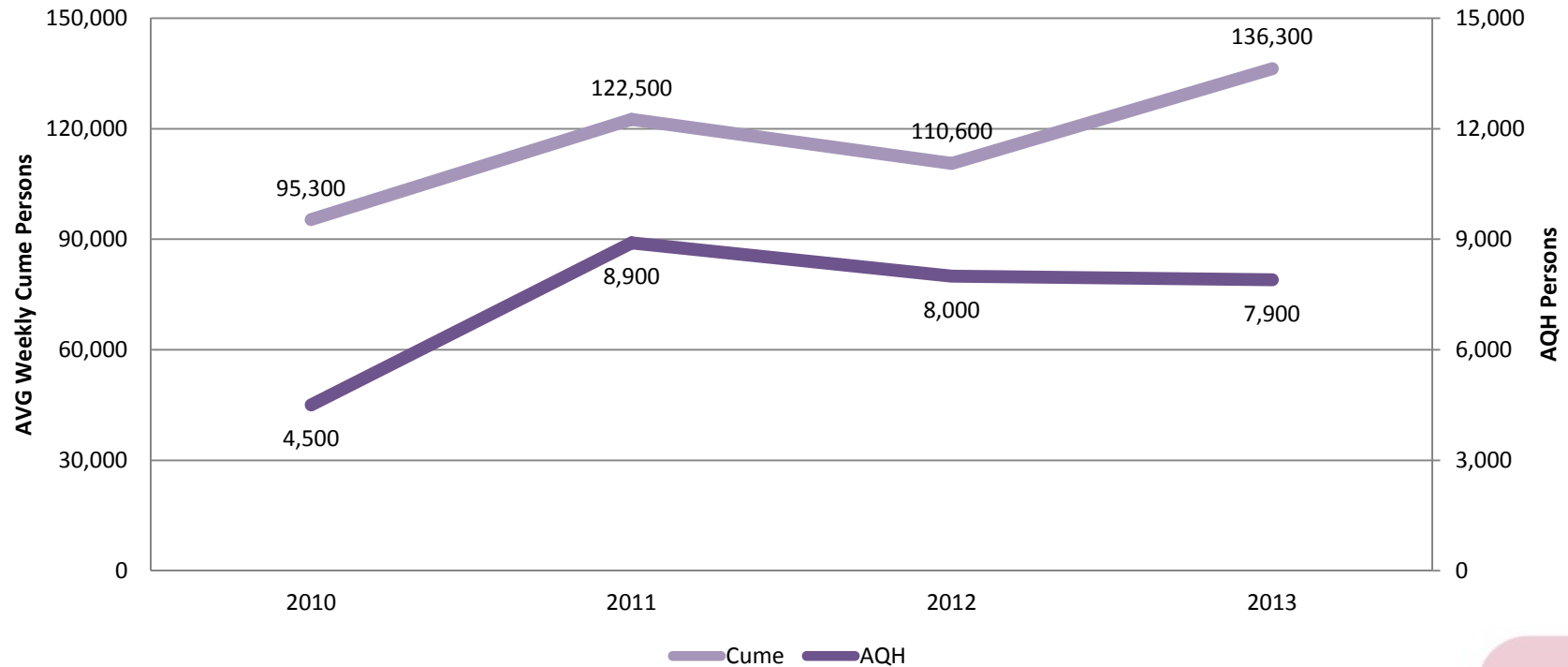


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The number of P1 College Graduates has jumped to the highest level in recent history while the AQH has tapered off

9 Full-Time Jazz Stations Spring Surveys Persons 25+ w/ College Degree - P1

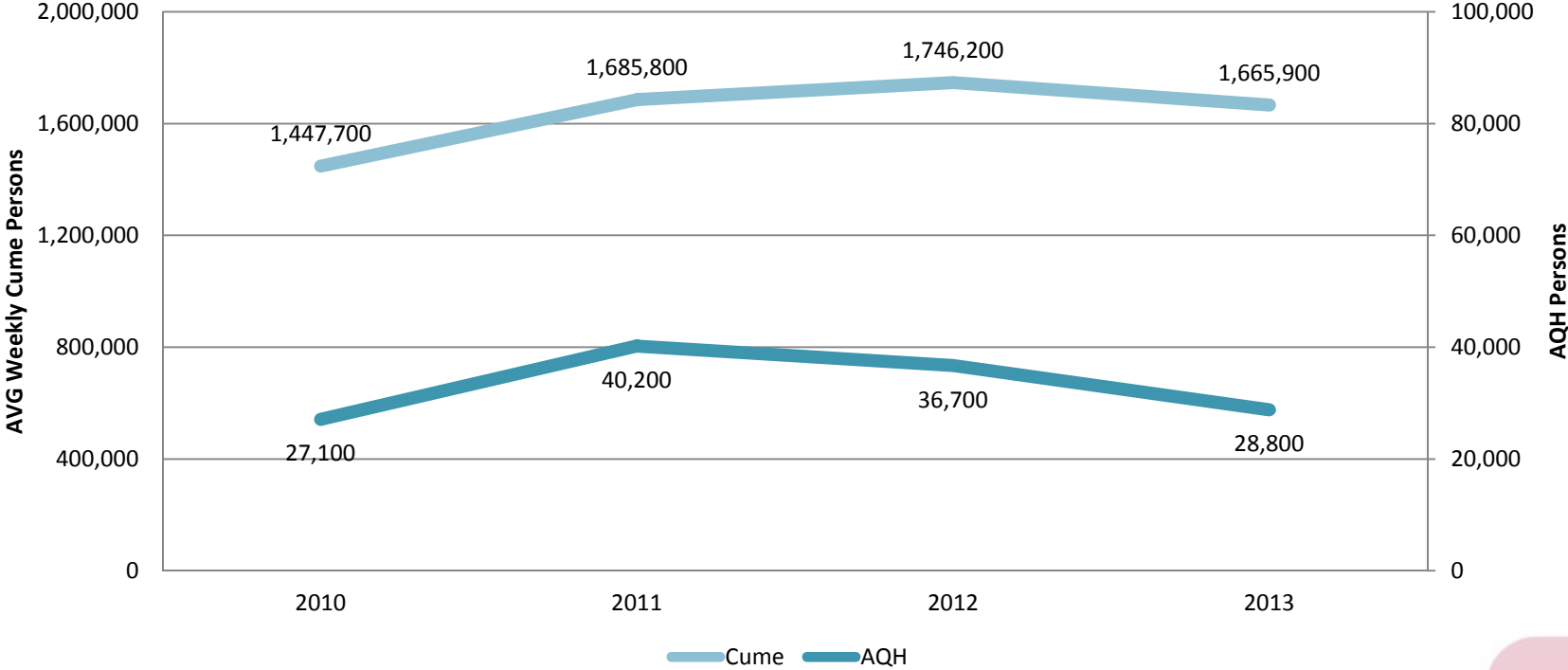


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AAA stations were down in Cume and AQH in 2013

12 Full-Time AAA Stations Spring Surveys Persons 12+

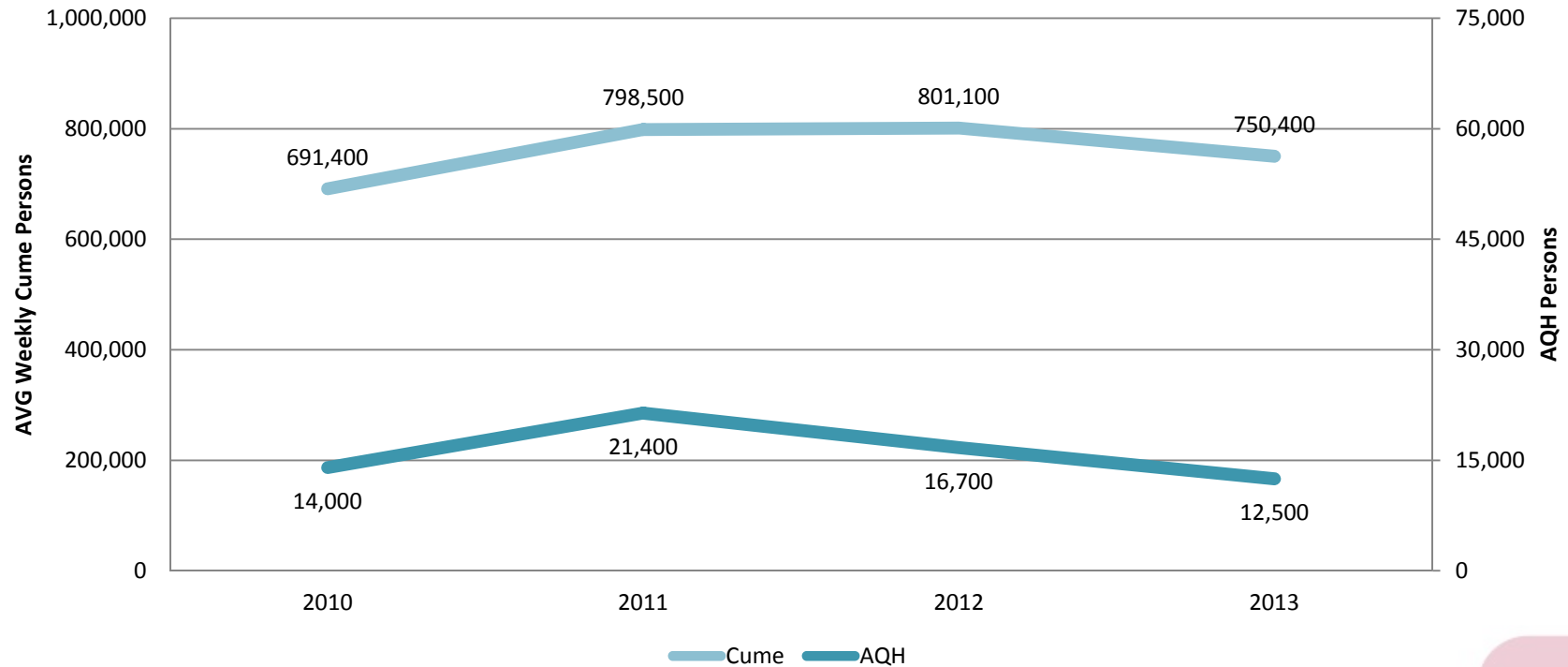


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Listening by College Graduates has declined for the second straight year

12 Full-Time AAA Stations Spring Surveys Persons 25+ w/ College Degree

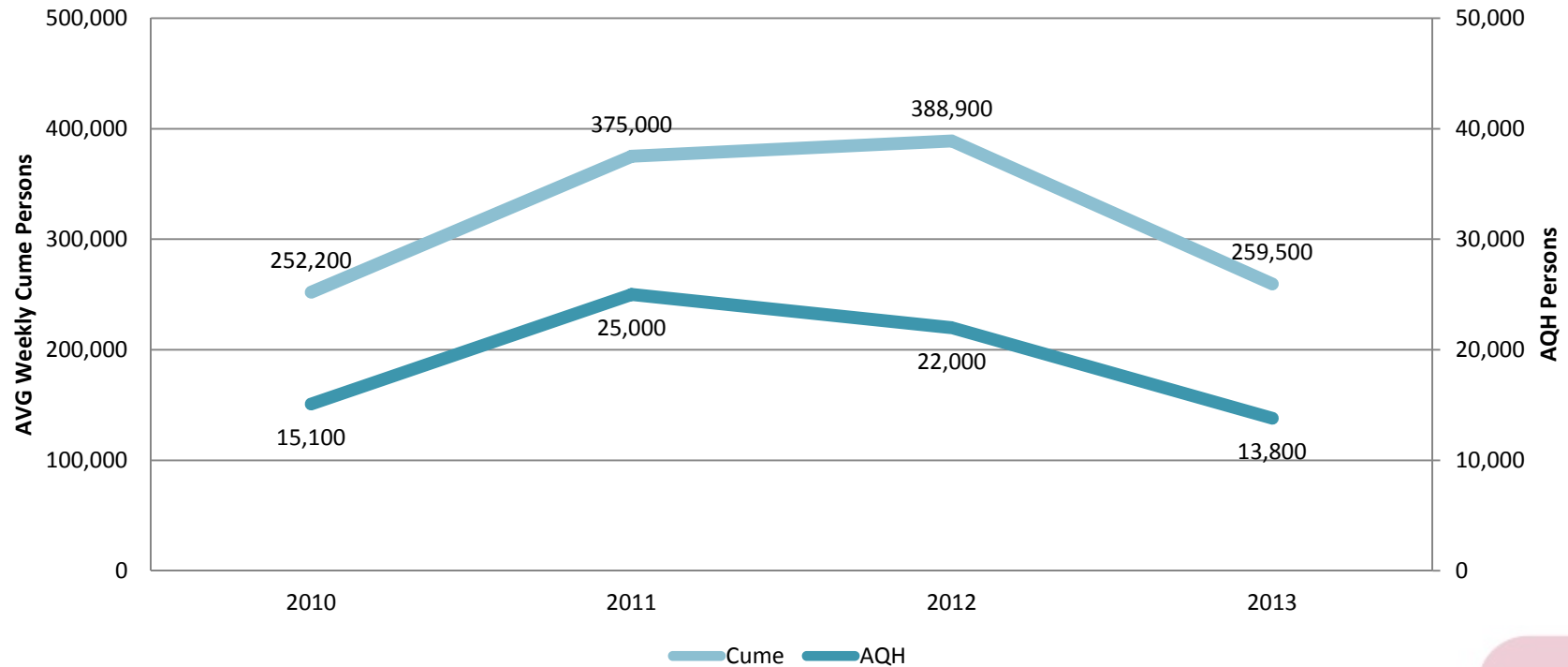


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First Preference listeners and listening have decreased drastically since last year

12 Full-Time AAA Stations Spring Survey Persons 12+ - P1

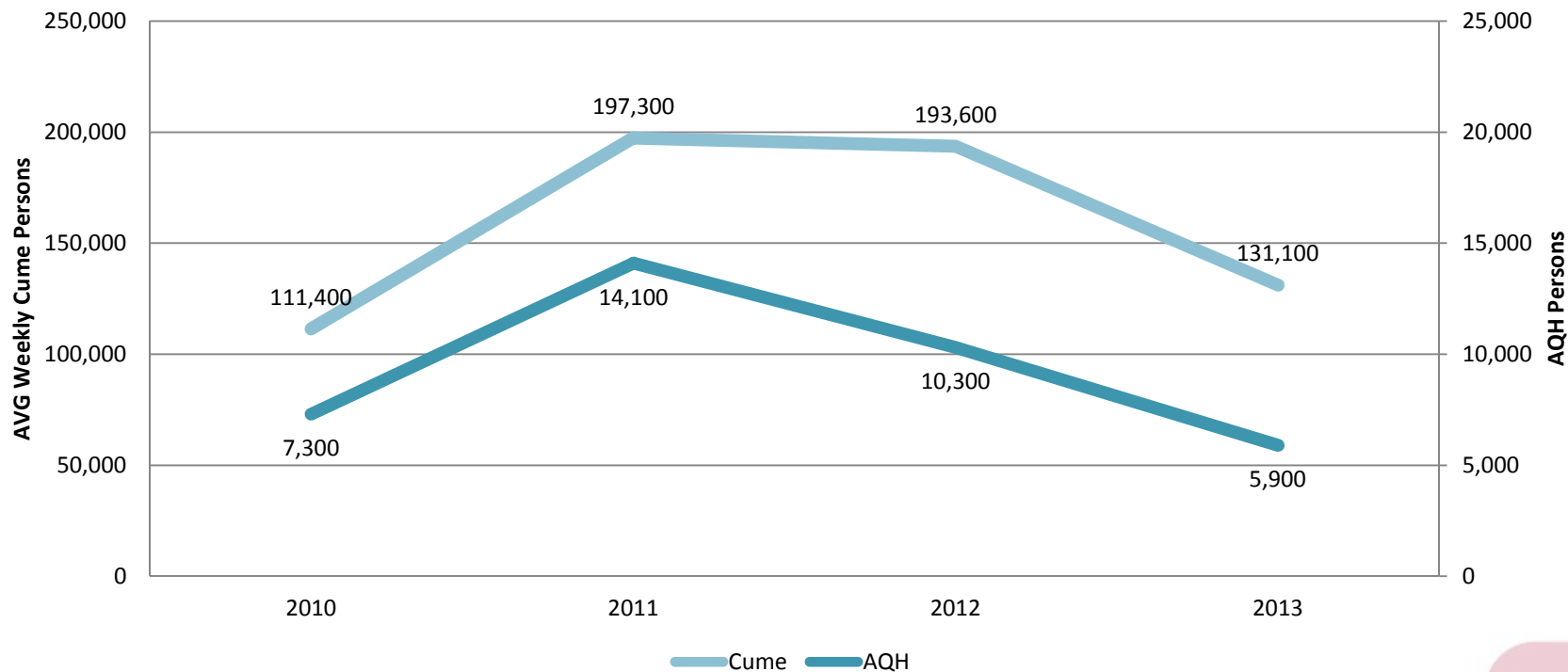


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P1 College Graduates listening to AAA stations dropped off sharply from last year while AQH fell by nearly half

**12 Full-Time AAA Stations
Spring Survey
Persons 25+ w/ College Degree - P1**



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In Conclusion

- While national trends are important, every local market and station is unique so your own local research is the most important
- Non-commercial formats have had mixed results over the last four years
- If radio's overall performance (PUMM) continues to decline, even the best performing formats/stations will feel the effect of a smaller available audience.

