# Support Your Great Storytelling!

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# RRC Resources for Underwriting

- Quantitative Research Nielsen Audio
- Qualitative Research Scarborough



# There's a logical order to storytelling...

- Local Market / Economy
- Client's Industry / Target Consumer
- Radio
- Public Radio
- Your Station



## What's the issue, Size... or Substance?

#### Nielsen Audio

Quantitative Data
Diaries and/or Meters
Size

### Scarborough

Qualitative Data Telephone, Booklet & Diaries Substance



### Nielsen Audio Shows Size

When underwriting prospects are concerned with size (they want to reach a lot of consumers and they don't think your media, format and/or station can do it)... Nielsen Audio allows you to share the most respected research in the advertising community to massage their needs.



# Scarborough Shows Substance

When underwriting prospects are concerned with quality (they want to reach a very targeted audience and they lack an understanding of who your listeners are)... Scarborough allows you to show the education, wealth and healthy hearts of your listeners, qualities that every organization wants to access.



# There are Reports...

#### Nielsen Audio:

Ranker communicates Size
Trend communicates Growth

### Scarborough:

IQP shows a snapshot Profile shares specifics



# Two Nielsen Audio reports:

#### Ranker

SEATTLE-TACOMA (Metro Survey Area) MAY17

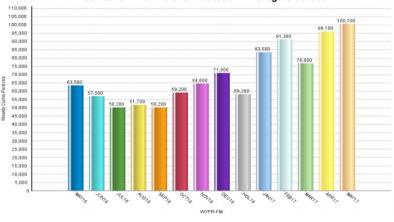
Stations Rankings Based on: Top 15 All Stations

M-F 6a-10a							
	Average Persons						
1	KUOW-FM	News Talk Information	19,900				
2	KNKX-FM	Variety	13,200				
3	KQMV-FM	Pop Contemporary Hit Radio	10,500				
4	KIRO-FM	News Talk Information	8,900				
5	KOMO-AM	All News	6,500				
6	KVI-AM	Talk/Personality	6,100				
7	KTTH-AM	Talk/Personality	5,90				
8	KJR-FM	Classic Hits	5,40				
9	KRWM-FM	Adult Contemporary	4,70				
10	KJAQ-FM	Adult Hits	4,60				
11	KZOK-FM	Classic Rock	4,00				
12	KIRO-AM	All Sports	3,70				
13t	KISW-FM	Active Rock	3,20				
13t	KMPS-FM	Country	3,20				
15	KPLZ-FM	Hot Adult Contemporary	3,10				

#### **Trend Report**

BALTIMORE (Metro Survey Area)
MAY17, APR17, MAR17, FEB17, JAN17, HOL16, DEC16, NOV16, OCT16, SEP16, AUG16, JUL16, JUN16, MAY16
Station Rankings Based on: User Selected

#### M-F 6a-10a for P 25+ Level of Education = College Graduate





# Two Scarborough reports:



#### **Target Profile**

MILWAUKEE-RACINE (Metro Survey Area)
SCARBOROUGH R1 2017: FEB16-JAN17 (REV.1) / SCARBOROUGH R1 2016: FEB15-JAN16 (REV.1)
ADULTS 18+

	WHO I	am Looking At				
	Radio Stations: WYMS-FN					
WHAT I Want to Know About Them	Target Persons	% of Target	Index			
Automotive						
Make of any vehicle owned or leased (HHLD)						
Mini:Any vehicle	2,831	4.0%	755			
Infiniti:Any vehicle	1,587	2.3%	462			
BMW:Any vehicle	3,236	4.6%	391			
Kia:Any vehicle	6,730	9.6%	25			
Lexus:Any vehicle	2,378	3.4%	226			
Jaguar:Any vehicle	491	0.7%	206			
Subaru:Any vehicle	5,316	7.5%	202			
Acura:Any vehicle	1,288	1.8%	179			
Mazda:Any vehicle	3,110	4.4%	175			
Jeep:Any vehicle	4,272	6.1%	137			
Porsche:Any vehicle	226	0.3%	12			
Nissan:Any vehicle	4,445	6.3%	122			
Volkswagen:Any vehicle	2,637	3.7%	118			
Toyota:Any vehicle	15,001	21.3%	118			



### ... And There Are Estimates

### Nielsen Audio:

Cume communicates <u>total size</u>
AQH communicates <u>currency</u>

### Scarborough:

% communicates <u>proficiency</u> Index communicates <u>impact</u>





### Nielsen Audio Estimates...

- AVG Weekly Cume Total size of station's audience
  - Lots of local consumers
  - Requires a campaign commitment to reach them
- Average Quarter Hour (AQH) Average audience size
  - Quite a few consumers every time announcement airs
  - More announcements means more success





# Scarborough Estimates...

- % of Target The Proficiency of a party to do something
  - 50% of our listeners own a Toyota, Honda or Nissan
  - Branding keeps you relevant with your current customers...
     and introduces you to your competition's customers
- Index How a party compares to the marketplace
  - Newtown NPR listeners are twice as likely as the general population to shop at Trader Joes (200 Index)
  - We're a smaller station at first, but we have just as many of your customers listening to us in the end.



Here's Jared!



# Local Examples – Nielsen Audio

- Audience Trends
- Age Comps
- Geo Targeting
- Reach & Frequency
- Median Age
- Exclusive Audience







### WABE DRIVES VS MARKET- AGE CELLS - 6 month avg

Station	Estimates	P12+ (B)*	Persons 12- 17	Persons 18- 24	Persons 25- 34	Persons 35- 44	Persons 45- 54	Persons 55- 64	Persons 65+
WABE-FM	Weekly Cume Persons *	285,600	14,300	11,300	67,200	56,900	47,600	51,100	37,300
	Weekly Cume Composition	100.0	5.0	3.9	23.5	19.9	16.7	17.9	13.0
	Weekly Cume Index	100.0	52.6	35.2	141.9	112.6	91.3	121.3	108.8
Analysis Total	Weekly Cume Persons	285,600	14,300	11,300	67,200	56,900	47,600	51,100	37,300
	Weekly Cume Composition	100.0	5.0	3.9	23.5	19.9	16.7	17.9	13.0
	Weekly Cume Index	100.0	52.6	35.2	141.9	112.6	91.3	121.3	108.8
Market Total	Weekly Cume Persons	3,724,200	354,200	417,900	617,800	659,000	679,900	549,000	446,500
	Weekly Cume Composition	100.0	9.5	11.2	16.6	17.7	18.3	14.7	12.0
	Weekly Cume Index	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
	WABE-FM Analysis Total	WABE-FM  Weekly Cume Persons * Weekly Cume Composition Weekly Cume Index  Analysis Total  Weekly Cume Persons Weekly Cume Composition Weekly Cume Index  Market Total  Weekly Cume Persons Weekly Cume Composition Weekly Cume Neekly Cume Persons Weekly Cume Persons Weekly Cume Composition Weekly Cume	WABE-FM Weekly Cume Persons * Weekly Cume Composition Weekly Cume Index  Analysis Total Weekly Cume Persons Weekly Cume Composition Weekly Cume Persons Weekly Cume Index  Market Total Weekly Cume Persons Weekly Cume Index  Market Total Weekly Cume Persons Weekly Cume Index  Market Total Weekly Cume Persons Weekly Cume Persons Weekly Cume Index In	WABE-FM   Weekly Cume   285,600   14,300	WABE-FM   Weekly Cume   285,600   14,300   11,300   11,300	WABE-FM   Weekly Cume   Persons *   Weekly Cume   100.0   5.0   3.9   23.5	MABE-FM   Weekly Cume   285,600   14,300   11,300   67,200   56,900	MABE-FM   Weekly Cume   285,600   14,300   11,300   67,200   56,900   47,600	WABE-FM   Weekly Cume



### **Audience**





# WABE 90.1 is the top station in Natural Body's ZipCodes and demographic.

ATLANTA (User Defined Survey Area) SEP16

Station	Rankinga	Bosed on:	All Stations

Statione	oa coca chi. I ili chai	Station Kankings De	Persons 12+			
			M-Su 6a-12m			
Statio	(	Weekly Cum e Persons	Average Persons	Average Rating*	Station	
1 WABE-FM	1	76,900	2,800	0.9	WABE-FM	1
2 WSTR-FM	2	89,600	2,100	0.7	WSB-AM	2t
3 WSB-AM		61,100	2,200	0.7	WSTR-FM	2t
4 WALR-FM		50,100	1,100	0.4	WAM J-FM	4
		50,000	1,000	0.3	WALR-FM	5t
5t WAMJ-FM		39,800	1,000	0.3	WFSH-FM	5t
5t WFSH-FM	- 5t	73,100	900	0.3	WSB-FM	5t
5t WSB-FM	- 5t	34,000	900	0.3	WVEE-FM	5t
5t VVVPVV-FM	USE OF 1 C+	82,900	800	0.3	WWPW-FM	5t
5t WZGC-FM	E4	46,200		0.3	WZGC-FM	
ed Sourcing Summ	nker Detailed S	Rai				

	Adults 31-60								
			M-Su 6a-12m						
		Station	Average Rating*	Average Persons	، Weekly Cum e Persons				
	1	WABE-FM	1.5	2,400	57, <i>4</i> 00				
	2	WSTR-FM	0.9	1,400	39,100				
	3	WSB-AM	0.7	1,200	53,300				
	4	WALR-FM	0.5	800	30,100				
	5t	WAM J-FM	0.4	600	21,800				
	5t	WFSH-FM	0.4	600	23,800				
	5t	WSB-FM	0.4	600	42,000				
DF 1	5t	VVVPVV-FM	0.4	600	56,400				
	5t	WZGC-FM	0.4	600	27,500				

**#PMDMC17** 

Survey: Geography: Nielsen Radio September 2016

Custom Geo = 30030; 30041; 30064; 30078; 30080; 30305; 30306; 30319 Monday-Sunday 6a-midnight

# WABE 2017 Schedule Delivery

Flight Dates: 09/05/2016 - 07/30/2017

Demo: P 21-64

Radio Market: ATLANTA

Survey: APR17 / MAR17 / FEB17 / JAN17 / HOL16 / DEC16

...

Schedule Description: FY17 Campaign Recap

Geography: Metro

	Daypart	Spots	Length	Unit Rate	CPM	Frequency	Net Reach	Gls	Total Cost
Radio Total		564		\$274.58	\$17.71	16.4	535,100	8,765,500	\$154,865.00
WABE-FM		564		\$274.58	\$17.71	16.4	535,100	8,765,500	\$154,865.00
				·	·		ŕ		, ,
Emory's FY17 - 47 wks (09/05, 09/12, 004/17, 04/24, 05/01, 05/08, 05/15, 05/22	9/19, 09/26, 10/03, 10/10, 10/ 2, 05/29, 06/05, 06/12, 06/19,	17, 10/24, 10/31, 11/ 06/26, 07/03, 07/10,	07, 11/14, 11/21, 11 07/17, 07/24)	/28, 12/05, 12/12, 12/19	9, 12/26, 01/02, 01/09	, 01/16, 01/23, 01/30,	02/06, 02/13, 02/20, 0	2/27, 03/06, 03/13, 03/	20, 03/27, 04/03, 04/10,
		564	,	\$274.58	\$17.71	16.4	535,100	8,765,500	\$154,865.00
One Week Total		12		\$274.58	\$17.71	1.6	120,300	186,500	\$3,295.00
	M-F 6A-10A	5	15	\$350.00	\$19.13	1.4	67,000	91,500	\$1,750.00
	M-F 12N-2P	1	15	\$165.00	\$16.84	1.0	9,800	9,800	\$165.00
	M-F 3P-7P	4	15	\$345.00	\$20.91	1.2	52,900	66,000	\$1,380.00
	M-Su 6A-12M	2	15	\$0.00	\$0.00	1.0	18,700	19.200	\$0.00
The first demolisted is the Privary De	4 6 4 7								$\sim 1$



# WABE 2018 Suggested Schedule

Flight Dates: 09/05/2017 - 07/29/2018

Demo: P 21-64

Schedule Description: FY18 Proposed Campaign

Radio Market: ATLANTA

Survey: APR17 / MAR17 / FEB17 / JAN17 / HOL16 / DEC16

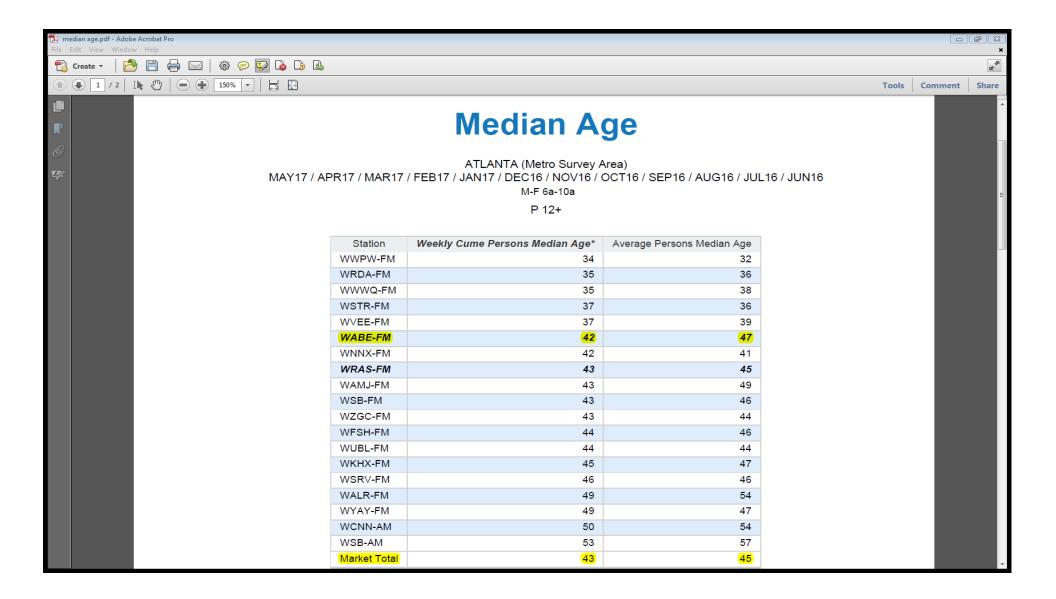
Geography: Metro

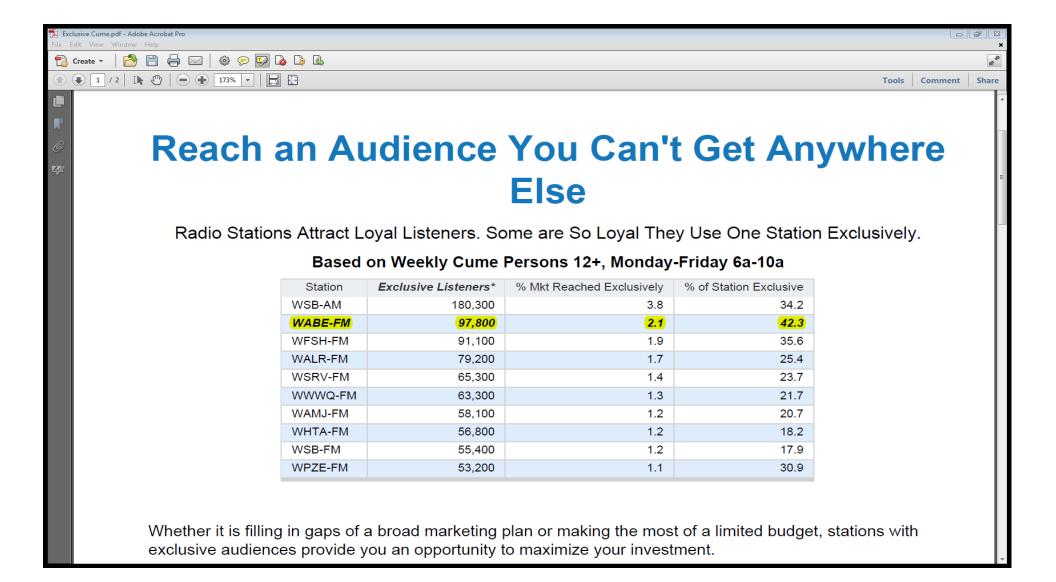
	Daypart	Spots	Length	Unit Rate	CPM	Frequency	Net Reach	Gls	Total Cost
Radio Total		893		\$221.58	\$15.71	22.9	549,700	12,581,900	\$197,870.00
WABE-FM		893		\$221.58	\$15.71	22.9	549,700	12,581,900	\$197,870.00
Emory's FY18 Proposal - 47 wks (09/04/04/02, 04/09, 04/16, 04/23, 04/30, 05/07	, 09/11, 09/18, 09/25, 10/02, 7, 05/14, 05/21, 05/28, 06/04,	10/09, 10/16, 10/23, 06/11, 06/18, 06/25,	10/30, 11/06, 11/13, 07/02, 07/09, 07/16,	11/20, 11/27, 12/04, 12 07/23)	/11, 12/18, 12/25, 01/	01, 01/08, 01/15, 01/22	2, 01/29, 02/05, 02/12	, 02/19, 02/26, 03/05, 0	03/12, 03/19, 03/26,
		893		\$221.58	\$15.71	22.9	549,700	12,581,900	\$197,870.00
One Week Total		19		\$221.58	\$15.71	1.8	147,400	267,700	\$4,210.00
	M-F 6A-10A	4	15	\$330.00	\$18.03	1.3	57,400	73,200	\$1,320.00
	M-F 12N-2P	1	15	\$150.00	\$15.31	1.0	9,800	9,800	\$150.00
	M-F 3P-7P	3	15	\$330.00	\$20.00	1.2	42,500	49,500	\$990.00
	M-Su 6A-12M	3	15	\$0.00	\$0.00	1.1	27,200	28,800	\$0.00
	M-F 5:45A-10A	2	30	\$375.00	\$21.31	1.1	32,400	35,200	\$750.00
	M-F 10A-3P	2	30	\$150.00	\$16.30	1.1	17,400	18,400	\$300.00
	M-F 3P-6:15P	2	30	\$350.00	\$20.35	1.1	31,400	34,400	\$700.00
	M-Su 5A-12M	2	30	\$0.00	\$0.00	1.0	17,900	18,400	\$0.00

By increasing your investment 28%, you will secure exponentially greater coverage on WABE.

Dta coed cate pair time will increase 125%, unit count by 58%, and frequency by 40%, allowing you to say more, more often, to WABE's audience of over ½ Million listeners.







# Local Examples - Scarborough

- Target Profile Market Level
- Target Profile Retail Level
- Target Profile Station Level
- Target Profile Sponsorship Level



### **Target Profile**

ATLANTA (Metro Survey Area) SCARBOROUGH R1 2016: FEB15-JAN16 (REV.1) ADULTS 18+

#### 91 % of the Atlanta DMA is listening to Atlanta Radio!

	WHO I am Looking At		
	DMA: Atlanta DMA		
WHAT I Want to Know About Them	Target Persons*	% of Target	
Radio - dayparts			
M-S 6am-mid cume			
TOTL-AF	3,748,783	90.9%	







#### Atlanta is a "Car Centric" culture, with long commutes and underdeveloped public transportation!

### **Target Profile**

ATLANTA (Metro Survey Area) SCARBOROUGH R1 2016: FEB15-JAN16 (REV.1) ADULTS 18+

Over 700,000 Atlantans have a one way commute of 30-59 minutes

### **Target Profile**

ATLANTA (Metro Survey Area) SCARBOROUGH R1 2016: FEB15-JAN16 (REV.1) ADULTS 18+

Atlantans are stuck in their cars, and listening to WABE!

	WHO I am Looking At
	Adults 18+ Metro
WHAT I Want to Know About Them	Target Persons*
Outdoor/Out-of-Home/Transportation	
Time spent traveling to work one way	
30 - 59 minutes	703,967

	WHO I am Looking At			
	Adults 18+ Metro			
WHAT I Want to Know About Them	Target Persons*	% of Target		
Outdoor/Out-of-Home/Transportation				
Mode of transportation past 7 days (any purpose)				
Drive (not carpool)	3,678,755	89.2%		









# **Characteristics of... Mercedes Benz of Buckhead's Shoppers**

ATLANTA (Metro Survey Area)
SCARBOROUGH R1 2017: FEB16-JAN17
ADULTS 18+

	WHO I am Looking At					
	Dealers/websites might shop to buy/lease new/usd vhcl (HHLD): Mercedes-Benz of Buckhead					
WHAT I Want to Know About Them	Target Persons	% of Target	Index*			
Household income summaries (HHLD): \$250,000 or more	13,637	15.2%	465			
Level of education summaries: Any college graduate	39,419	44.0%	135			
Events attended/places visited past 12 months: Live theater	17,171	19.2%	118			

**#PMDMC17** 

https://tapweb.nielsen.com/?fromReportGroup=no - TAPSCAN - Research Reports - Internet Explorer

Presentation View





# **Characteristics of... WABE 90.1's Audience**

ATLANTA (Metro Survey Area)
SCARBOROUGH R1 2017: FEB16-JAN17
ADULTS 18+

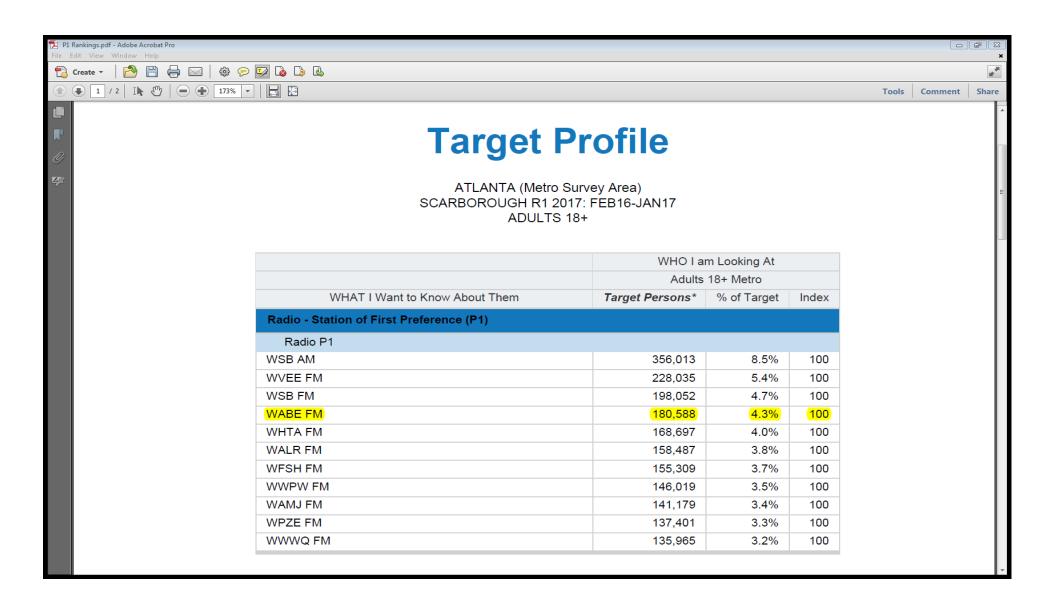
	WHO I am Looking At		
	Radio Stations: WABE-FM		
WHAT I Want to Know About Them	Target Persons	% of Target	Index*
Household income summaries (HHLD): \$250,000 or more	20,781	5.6%	171
Level of education summaries: Any college graduate	205,136	55.3%	170
Events attended/places visited past 12 months: Live theater	80,101	21.6%	132

**#PMDMC17** 

https://tapweb.nielsen.com/?fromReportGroup=no - TAPSCAN - Research Reports - Internet Explorer

Presentation View







# WABE audience profile for MARKETPLACE

Affluent - 170% more likely to have a household income of at least \$250,000 - 164% more likely to own a home valued at \$500,000	Well-Educated - 103% more likely to have at least a 4 year college degree - 186% more likely to have a post graduate degree	Business Leaders - 121% more likely to be in management - 65% more likely to be in professional services	Philanthropic  - 109% more likely to contribute money to a political organization - 157% more likely to contribute money to an art and cultural
			organization - 70% more likely to
ΜΔΡΚΕΤΡΙ ΔΩΕ°			contribute money to an educational organization

Here's Susan!



# NPR Resources for Sponsorship Sales

- Profile
- Halo Effect Research
- Effectiveness of NPR vs. Commercial Radio & TV



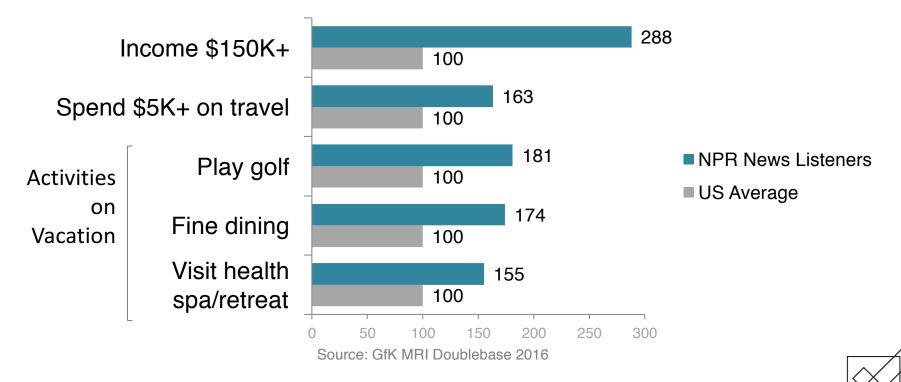
### Use Profile to Show Desirable Audience Characteristics

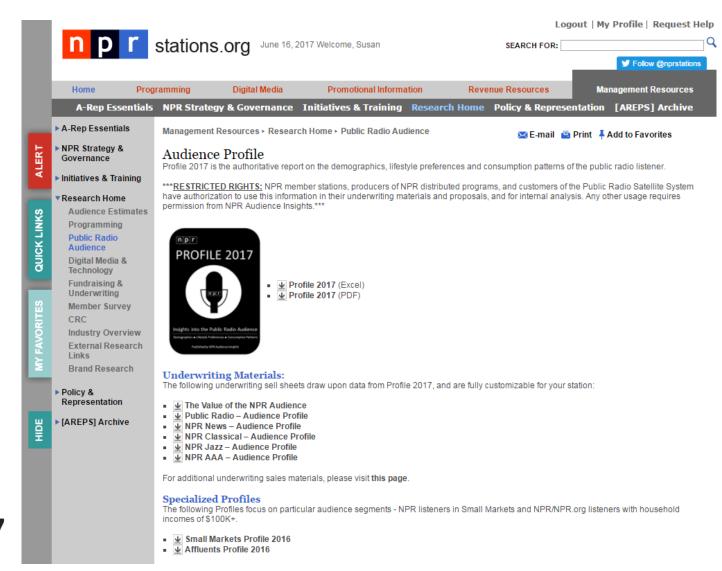
#### Three versions:

- The Profile news and music station audiences vs. total US population
- Small Markets Profile just among C & D counties, those with less than 85K households
- Affluents Profile -- \$100K+ households

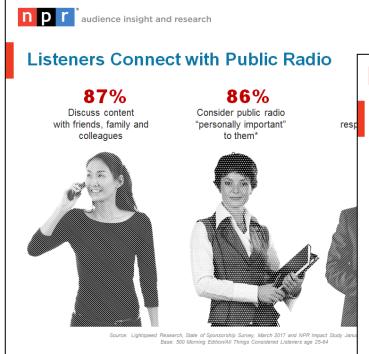


### Use Profile to Show Desirable Audience Profile





## Halo Effect: The Unique Value of Public Radio



Customizable "Halo" deck available on NPR Stations

n p r audience insight and research

Listeners Connect with Public Radio Sponsors
The "Halo Effect" of NPR

7 1
PERCENT

Hold a more positive opinion of sponsors that support NPR

**60** 

PERCENT
Agree NPR is selective about companies that sponsor its programming

70
PERCENT

Prefer to buy products or services from NPR sponsors

#PMDMC17

Source: Lightspeed Research, State of Sponsorship Survey, March 2017 % Agree or strongly agree among Morning Edition/All Things Considered weekly listeners, n=500

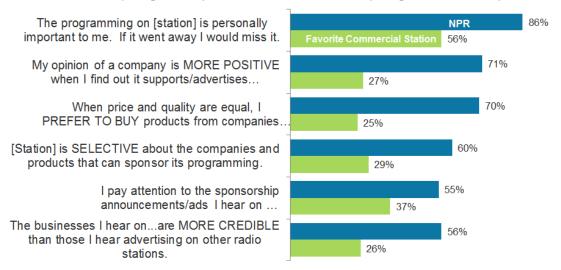




#### **Public Radio Halo Surpasses Commercial Radio**

#### **% Agree with Statements**

about NPR (among listeners) or Favorite Commercial Station (among non-NPR listeners)



Source: Lightspeed Research, NPR State of Sponsorship Survey, March 2017. % saying "agree" or "strongly agree" NPR ratings among weekly Morning Edition/All Things Considered listeners, n=500.

Commercial ratings among non-NPR Listeners who named a radio station they listen to most often, n=388

13



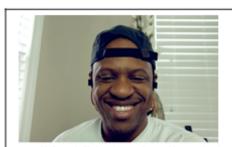


# Effectiveness of NPR vs. Commercial Radio & TV

### **Evaluating Engagement/Impact of NPR Credits**

#### Facial recognition technology measures unconscious reaction to audio

- To assess the unconscious response to NPR content vs. commercial news radio content, NPR conducted a research project with Research Narrative, using the tool Real Eyes.\*
- The study used a facial recognition technology which records and encodes audiences' facial expressions according to their emotional response as they consume content. This tool has been shown to predict a wide range of marketplace outcomes from the virality of online videos to ad-driven purchase behaviors. Used regularly for ad testing (including but not limited to soundtrack selection), this type of methodology is now emerging as a resource for measuring content engagement in both video and audio.



Participants listen to, and react to content as it streams on their computer or mobile device



Facial expressions are captured and coded as they react to the content



This data is tabulated and summarized across a range of globally validated emotional parameters

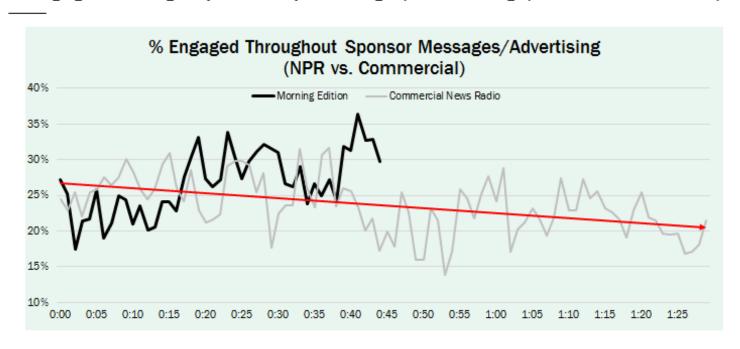


NPR's News Content is Uniquely Valuable to the Audience and Holds Audience Attention More Effectively throughout Sponsor Breaks than Commercial Radio



## **Engagement Grows During Morning Edition Credits**

% Engaged Through Sponsorship Messages/Advertising (NPR vs. Commercial)



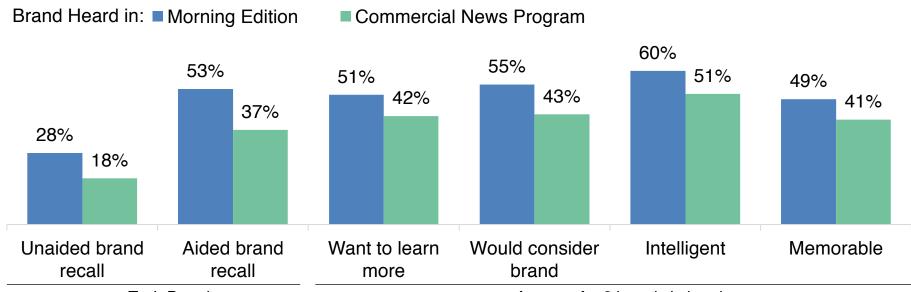
#PMDMC17

Data reflects average % engaged during sponsor message in each segment, using facial recognition. Source: Research Narrative, Impact of Audio Study, June 2016.



### NPR Messages Achieve Greater Recall and Brand Interest

#### **Brand Recall, Interest & Perceptions**



Tech Brand (same brand in both programs)

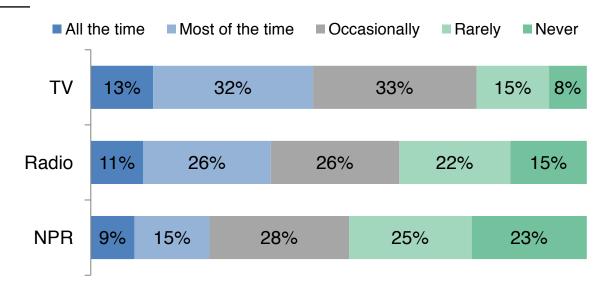
Average for 3 brands in break



### Compared to TV, Listeners Give NPR More Attention

Q: When you have the \_\_\_\_\_ on, how often are you also using other media at the same time, such as using a computer or smartphone or reading?

**Among NPR Listeners** 



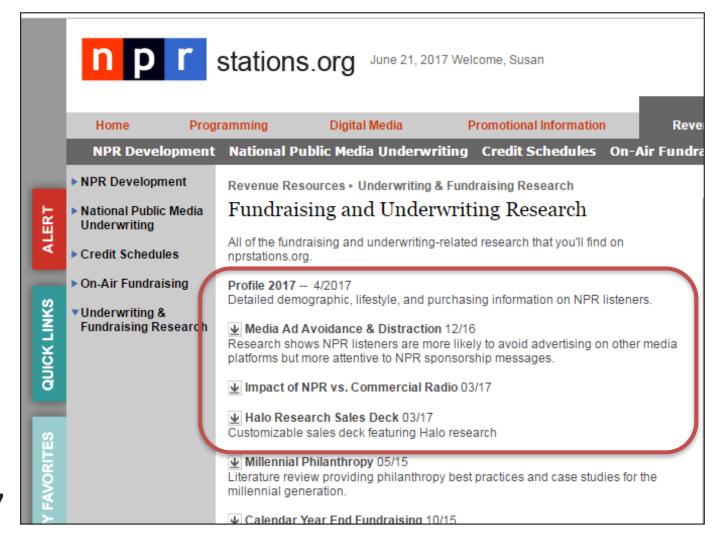
74%

of listeners agree "I am more attentive to the content when listening to NPR than I am when watching TV"

#PMDMC17

Base: Listeners = Morning Edition/All Things Considered listeners (n=500). Source: Lightspeed Research, NPR Sponsorship Survey, November 2016

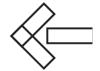




# **Speaker Information**

- Dave Sullivan, Radio Research Consortium Manager, PPM Client Services
- Jared Blass Vice President of Underwriting at Public Broadcasting Atlanta (PBA)
- Susan Leland Associate Director, Audience Insights NPR





### Special thanks to our Platinum Sponsors!













