P1s in the PPM™ World: Insights into the Listeners Who Matter Most

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Introduction

For over a decade the radio industry has focused on P1, or first preference, listeners—those who listen most to a station. In the Diary world, a rule-of-thumb says that P1s represent 33% of a radio station's cume and 70% of its Average Quarter-Hour (AQH) audience.

The importance of P1s continues in the PPM world. In fact, P1s may have more importance with PPM because they represent a smaller portion of a station's cume (20%), and nearly the same proportion (63%) of a station's Average Quarter-Hour audience.

The PPM also demonstrates that all P1s are not created equal. Passive electronic measurement and tracking consumers over time combine to provide new insights into which P1s matter most and how P1 loyalty impacts stations. In particular, consumers who are highly loyal to their P1 station *and* are heavy users of radio are the most important listeners to a station. We call these listeners "Prime P1s." Cementing "Prime P1" loyalty is a key component of a station's performance in the ratings. Growth potential comes from increasing time spent among P1s who are heavy radio users but exhibit less loyalty to their P1 station than Prime P1s. We call these consumers the "Best Prospects."

Overview of Methodology

dmr and the University of Wisconsin-Madison's A.C. Nielsen Center for Marketing Research approached Arbitron with a proposal to evaluate respondent-level PPM data to reveal new insights into radio brand loyalty through extensive quantitative analysis. Arbitron saw considerable merit in the proposal and contributed 10 weeks of anonymized respondent PPM data covering the period of 9/21/06-11/23/06. The data set comprised 2,096 individuals.

The project was conducted by Ty Henderson, Ph.D., while he was a doctoral candidate at the University of Wisconsin-Madison. Henderson performed extensive quantitative analysis on the data set and provided dmr and Arbitron with the results. dmr and Arbitron found the academic analysis to be compelling, and both companies worked together to interpret and present the findings from a radio business perspective.

Note: The data set for this time period did not include several non-encoding stations. These stations represented an estimated 11% share of the market in the final diary survey in Houston. The missing stations and their formats are detailed in the appendix of this report. While it would have been preferable to have these stations included in the analysis, it is the authors' opinion that the absence did not have a significant impact on the overall conclusions of this study.

Definition of Terms

First Preference (P1)

PPM data reveal that on average people tune in to more than 5 stations per week. However, like their consumption of other products and services, consumers exhibit *brand-loyal* behavior when it comes to radio listening. In radio, the concept of brand loyalty is called *preference level*. The station that a listener spends the most time listening to is called the first preference station, or P1 station. The P2 station is their second most-listened-to station, the P3 is their third, and so forth. Both Diary and PPM services show that P1s contribute significantly to a station's ratings. However, PPM illuminates new dimensions of consumer preference patterns and at a level of detail far beyond what we were able to observe with the Diary.

The relationships of two audience measures in particular offer important new insights into how consumers use radio, namely, the measure of overall time with radio (also referred to as Time Spent with Radio), and the percent of time with radio a listener spends with their preferred station (also referred to as Loyalty). A third audience measurement, which we call "Stability," is unique to the PPM world. Stability examines the consistency of listening preference over time. Altogether, the new perspectives on radio consumption offered by these statistics lead to a much clearer understanding of degrees of loyalty.

Time Spent with Radio

Time Spent with Radio is the measure of a consumer's total exposure to radio in an average week. While these numbers vary slightly by market, in general, heavy time with radio amounts to more than 7 hours per week and light time with radio amounts to less than 7 hours per week.

Loyalty, or Percent of Listening to a P1 Station

Percent of Listening (POL) measures a listeners' time with their P1 station as a percentage of their total Time Spent with Radio. This is a better measure of a radio consumer's Loyalty than prior definitions of P1 because it documents the degree of commitment to a given station.

Stability

In the Diary world, we examine consumer preferences over 1 week. In the PPM world, measurement is conducted with a panel of consumers who participate over an extended period of time. We can better understand both overall Time Spent with Radio and Percent of Listening over time. An analysis of consecutive weeks of data show that while P1 switching does occur, the majority of consumers have only one or two P1 stations over a 10-week period.

Prime P1s

Prime P1s are the portion of radio listeners who are heavy users of radio *and* are deeply loyal to their P1 station. In particular, Prime P1s spend over 7 hours per week with radio and devote over 57% of their total radio time to their P1 station.

In PPM measurement, P1s represent 20% of a station's cume and contribute nearly two-thirds of a station's AQH audience. Prime P1s represent the crucial portion of the P1 audience that drives half of the station's listening.

Best Prospects

Best Prospects are P1s who are heavy radio users and devote less than 57% of their total radio time to their P1 station. Best Prospects represent a station's biggest opportunity for growth because they are heavy radio users who already spend most of their time on their P1 station.

Example: Three P1 Listeners

Using Loyalty and Time Spent with Radio, we can understand which P1s matter most to a station. In fact, we can track Percent of Listening and Time Spent with Radio to more effectively group listeners according to their value to radio in general, a specific format, or an individual station. The following examples illustrate these new measures.
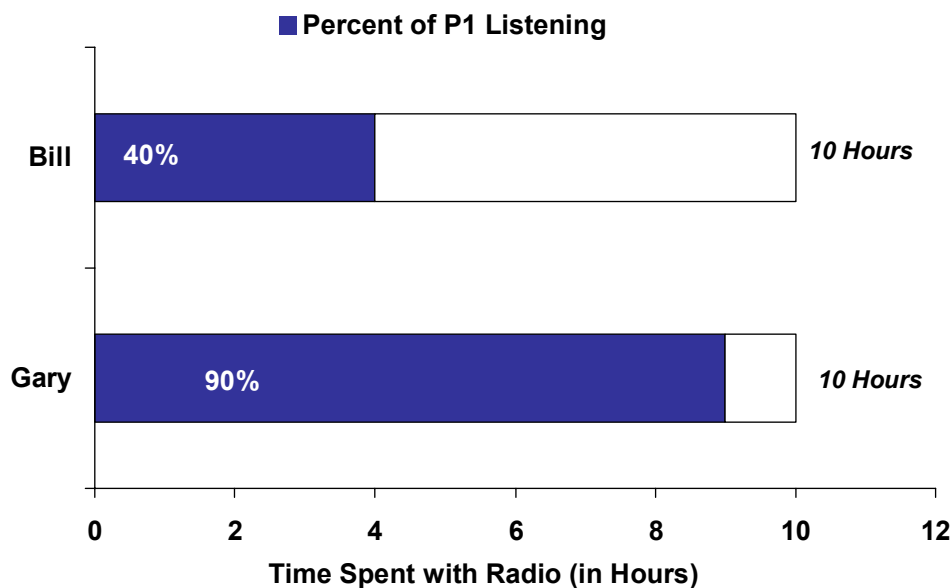
Dimension One: Loyalty (Percent of Listening to the P1 station)

Consider two listeners, Gary and Bill, who both listen to radio an average of 10 hours a week and have WXYZ as their P1 station. The PPM data shows that Bill isn't very loyal to WXYZ, spending only 40% of his radio listening with his P1 station.

In contrast, Gary is quite loyal. He listens to WXYZ for an average of 9 hours of his total 10 hours a week, giving 90% of his listening to WXYZ. Clearly, Gary is a more valuable listener.

With prior definitions of P1 listening, both listeners would have had equal value. However, this example illustrates that Gary has greater impact because he dedicates a far higher Percent of Listening to his P1 station.

Figure 1a: Listening Profile for Two Hypothetical Listeners

■ **Percent of P1 Listening**

Bill	40%	*10 Hours*
Gary	90%	*10 Hours*

Time Spent with Radio (in Hours): 0 2 4 6 8 10 12

Bill	Gary
P1 Station: WXYZ	P1 Station: WXYZ
P1 Percent of Listening: 40%	P1 Percent of Listening: 90%

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Dimension Two: Time Spent with Radio

Now let's consider Pierre, who has the same 90% of P1 listening to WXYZ as Gary, but who spends 27 hours a week with radio—17 more hours of time with radio than either Gary or Bill spend. This makes Pierre a much more attractive listener to WXYZ. Figure 1b presents all three listeners on both dimensions—their P1 Loyalty, and their Time Spent with Radio. These important differences between listeners would remain undetected by focusing only on P1.

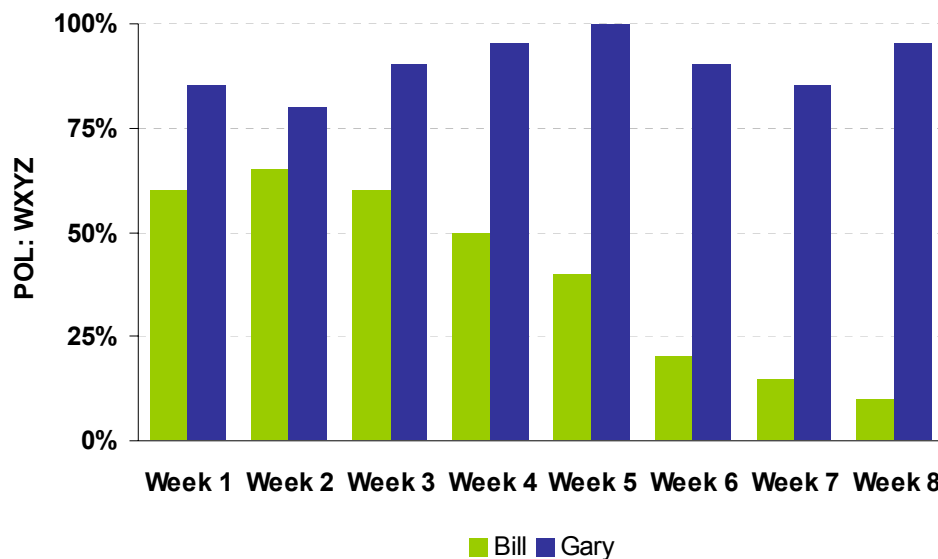### Figure 1b: Listening Profile for Three Hypothetical Listeners

■ Percent of P1 Listening

Time Spent with Radio (in Hours)

Bill	Gary	Pierre
P1 Station: WXYZ	P1 Station: WXYZ	P1 Station: WXYZ
P1 Percent of Listening: 40%	P1 Percent of Listening: 90%	P1 Percent of Listening: 90%
Time spent with Radio: 10 hours	*Time spent with Radio: 10 hours*	*Time spent with Radio: 27 hours*

Dimension Three: Stability

In the world of marketing consumer packaged-goods, loyalty is measured not only by how much of a particular product's consumption is accounted for by a single brand (radio's equivalent: Percent of Listening), but also by how consistent that consumption is over time. Preference stability is an important indicator of how marketing and programming impact listeners.

The case is even more dramatic when Percent of Listening to WXYZ is examined over time (Figure 1c). Gary consistently gives 80%-100% of his listening to WXYZ (averaging 90%). Bill's loyalty to WXYZ is lower than Gary's, and it declines from 65% to 10% over eight weeks.

Figure 1c: WXYZ Percent of Listening (POL) Over Time

The combination of the three key measures of listener behavior—Loyalty (Percent of Listening to the P1 station), Time Spent with Radio and Stability (preference stability over time)—offers deeper insights and the most comprehensive diagnostics on radio station health. These measures provide radio management with a more effective system to classify, identify, target and build listening among the most important consumers to the station.

Significant Highlights

- **P1s or first preference listeners—those who listen the most to a particular station—continue to represent the majority (two-thirds) of a typical station's Average Quarter-Hour audience in the PPM world.** Thus, P1s continue to be a vital audience segment for programmers and marketers.

- **Heavy radio users (those who spend more than 7 hours a week listening to radio) represent 50% of all consumers, but they generate the vast majority, almost 90%, of the market's AQH.** The population of a market can be split into listeners with Heavy and Light radio usage. Half of the panel spend more than 7 hours a week with radio. The other half is comprised of Light radio listeners who spend less than 7 hours per week with radio. Even though the Light radio users represent 50% of all consumers, they contribute only 12% of the total AQH for the market.

- **Half of consumers spend more than 57% of their radio listening with their P1 station.** Loyalty is expressed as the percentage of total radio time a consumer spends with their P1 station. Listeners who spend more than 57% of their time with their P1 station are described as having "Deep" Loyalty to their P1 station. Half of consumers spend less than 57% of their time with their P1 station. These listeners are described as having "Shallow" Loyalty to their P1 station.

- **Consumers who spend a lot of time with radio *and* have Deep Loyalty to their P1 station are called Prime P1s—and they are, not surprisingly, the most important radio consumers to a station.** While we know that P1s represent 20% of a station's PPM cume, they generate 63% of the station's AQH. It turns out that when you categorize those P1 listeners by the dimensions of Time Spent with Radio and Loyalty (Percent of Listening to P1), an even more important subgroup of P1s emerges: Heavy radio listeners who spend more than 57% of their time with their P1 station are the most important listeners. Although these Prime P1 listeners represent only 2%-3% of a station's cume, they account for nearly *half* of the station's listening. Prime P1s can be compared to an airline's highest level of frequent-flyers. While these brand-loyal users represent only a small fraction of the total flyers for the airline, they account for a very large percentage of the revenue.

- **Consumers who spend a lot of time with radio but are not yet deeply loyal to their P1 station are called Best Prospects.** Best Prospects represent the biggest potential payoff for audience growth since they are Heavy radio listeners who already sample the station.

- **Time Spent with Radio is very consistent over time.** The overall amount of radio used is highly stable, ranging from 7 to 8 hours per week. This implies that consumers have lifestyle or structural factors that control their access to radio and, therefore, their overall amount of radio used.

- **Two-thirds of consumers have only one or two P1 stations over a 10-week period.** Most listeners have only one or two P1 stations over 10 weeks. Specifically, 38% of consumers have only one P1 station, and 29% have two P1s over that 10-week period.
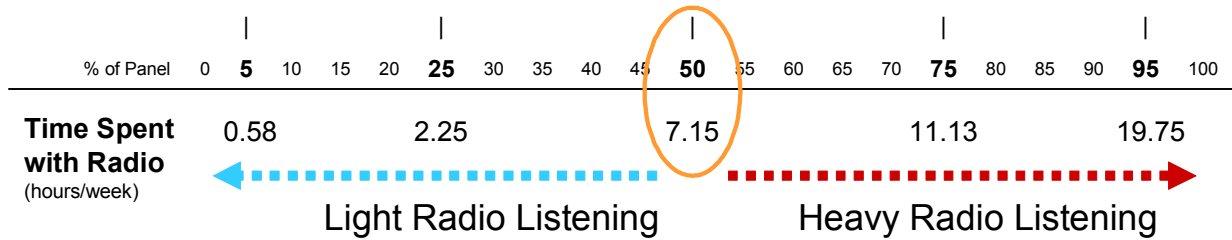
- **Consumers who tune in to fewer P1 stations over time are significantly heavier radio listeners.** Consumers with one P1 station listen to over 5 times more radio than a consumer who switches P1 stations every other week.

- **The more P1 stations a consumer has over time, the lighter their overall radio usage.** Those with a lot of P1 stations over time have far less impact on the ratings because they are significantly lighter radio users and contribute few hours to any one station. Thus, chasing consumers who regularly switch P1 stations is not likely to be a productive programming or marketing strategy.

- **While the very old and the very young are the lightest users of radio, Loyalty increases with age.** The heaviest users of radio are those aged 45-54 and 25-34 years, followed by those aged 18-24, 35-44 and 55-64 years. The lightest radio users are aged 6-11 years and then those who are 65+ and teens. Loyalty is highest with the oldest listeners (55-64 and 65+ years), followed by those aged 45-54, 25-34 and 6-11 years. The least loyal consumers (with Loyalty defined as Percent of Listening to a P1 station) are aged 18-24 years, followed by teens.

- **Spanish-speaking and African-American consumers show the highest radio usage, while African-American and Other consumers have the highest loyalty.** African-Americans are the only racial/ethnic group with both high loyalty and heavy radio usage

- **P1s are a valuable target for advertisers.** In today's world of media fragmentation, consumers have become time starved and attention challenged. This study reveals that the vast majority of radio station audiences come from deeply loyal radio consumers. Thus, advertising on radio is most likely to reach people who spend the majority of time with their P1 station. This means that radio provides a "sticky" environment for advertisers to reach loyal listeners. It also means that each station provides a unique opportunity for advertisers since their loyal P1 audience can not be reached effectively on other stations.

Key Findings

1. **Listeners with heavy overall radio usage spend more than 7 hours per week with radio.**
   The panelists were split into 2 equal groups: Heavy listening—persons who spend more than 7 hours per week with radio; and Light listening—persons who spend less than 7 hours with radio. Figure 2 shows the distribution of listening across the panelist data.
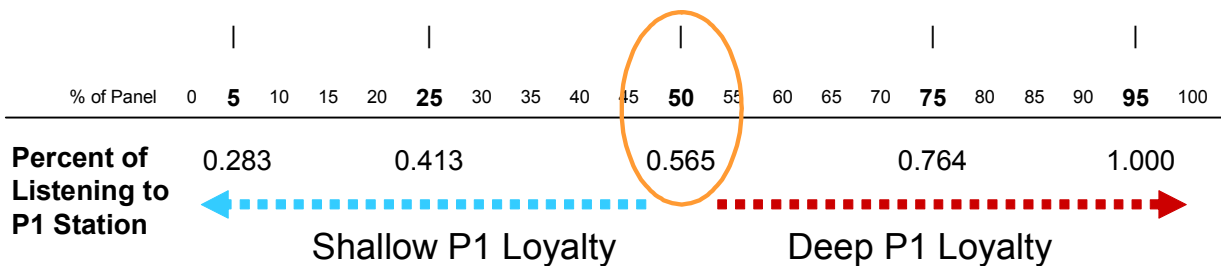
Figure 2: Measuring Heavy and Light Listening

% of Panel	0	**5**	10	15	20	**25**	30	35	40	45	**50**	55	60	65	70	**75**	80	85	90	**95**	100

Time Spent with Radio (hours/week)

| 0.58 | 2.25 | 7.15 | 11.13 | 19.75 |

Light Radio Listening   Heavy Radio Listening

2. **Half of consumers allocate more than 57% of their listening time to their P1 station.**
   Consumers can also be segmented by their Percent of Listening (POL) to their P1 station. The Percent of Listening (POL) provides a measure of the degree of Loyalty to the P1 station. Figure 3 shows that the median value for Percent of Listening (POL) is 57%. In other words, half of the panel spends more than 57% of their time with their P1 stations, and half of the panel spends less than 57%. We consider those who spend more than 57% of their time with their P1 station as having Deep Loyalty, and those below 57% as having Shallow Loyalty, to their P1 station.

Figure 3: P1 Loyalty (Percent of Time Spent with P1 Station) as a Percentage of Total Listening

% of Panel	0	**5**	10	15	20	**25**	30	35	40	45	**50**	55	60	65	70	**75**	80	85	90	**95**	100

Percent of Listening to P1 Station

| 0.283 | 0.413 | 0.565 | 0.764 | 1.000 |

Shallow P1 Loyalty   Deep P1 Loyalty

3. **Radio users can be categorized by the 2 key dimensions: Loyalty and Time Spent with Radio.** We segmented radio listeners into 4 equal groups based on time with Radio and Loyalty.

- **Light Shallow:** Persons who spend little time with radio overall and have a low Percent of Listening to their P1 station

- **Light Deep:** Persons who spend little time with radio overall and have a high Percent of Listening to their P1 station

- **Heavy Shallow:** Persons who spend a lot of time with radio overall and have a low Percent of Listening to their P1 station

- **Heavy Deep:** Persons who spend a lot of time with radio overall and have a high Percent of Listening to their P1 station

Figure 4 shows that while consumers are split evenly across the 4 segments, the contribution of total amount of radio listening from each group is strikingly different. For example, 25% of consumers are Heavy radio listeners and have high Loyalty for a single station, but those consumers contribute nearly half (49%) of all radio listening.

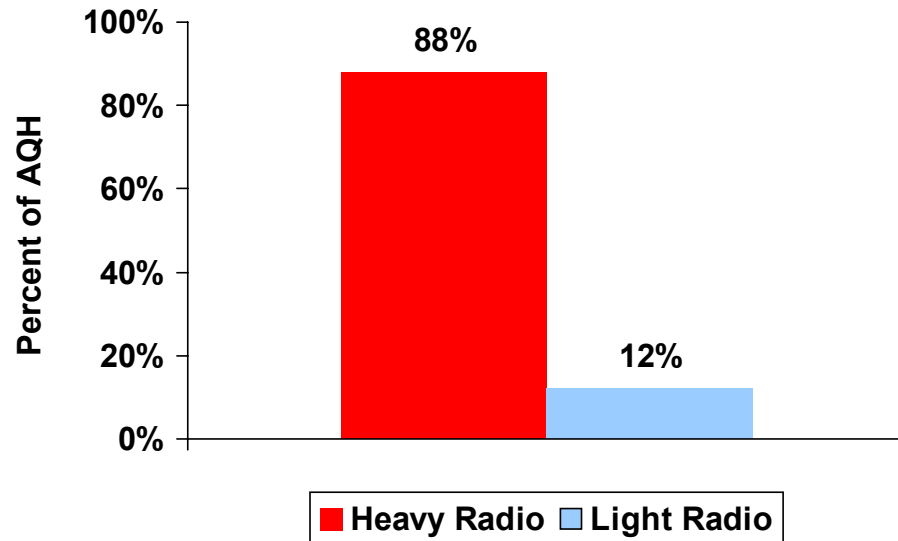**Figure 4: Distribution of Radio Listeners by Loyalty and Time Spent with Radio**
(Note: Each quadrant represents 25% of the population)

Consumer Segment	Percent of Market	Percent of Market AQH
Light Shallow	25%	7%
Light Deep	25%	5%
Heavy Shallow	25%	39%
Heavy Deep	25%	49%

How to read: Each segment represents 25% of the population. Listeners who have Heavy radio usage and Deep Loyalty to their P1 station contribute nearly half (49%) of the total market listening, even though they represent just 25% of the population.

4. **Consumers with heavy time spent with radio are the most important radio consumers.**
Those with Heavy Time Spent with Radio (more than 7 hours per week with radio) account for 88% of all radio Average Quarter-Hour listening, even though they represent only half of the panel. The remaining half of the panel comprises Light overall time spent listening. Casual radio usage (less than 7 hours per week with radio) contributes only 12% of the market's total Average Quarter-Hour listening.

Figure 5: The Power of Heavy Radio Listeners

5. **A small percentage of a station's cume is heavy radio users who are deeply loyal to their P1 station, yet they drive nearly half of the station's AQH.** Figure 6 illustrates audience segments for a leading AC station by Loyalty and Time Spent with Radio. In this case, we look at the preference level in 3 segments: P1 listeners with Deep Loyalty, P1 listeners with Shallow Loyalty, and Non-P1 listeners (Persons not P1 to the station).

   Listeners with Heavy Time Spent with Radio represent 59% of the station's cume and 82% of its Average Quarter-Hour audience. Among the Heavy Time Spent listeners, those who are deeply loyal P1s represent only 3% of the station's cume but nearly half (46%) of its AQH audience. The Heavy radio listeners who have shallow loyalty as P1s represent 2% of the cume and 10% of its Average Quarter-Hour audience. The Heavy radio listeners who are not P1s to the station represent 54% of the cume and 26% of the AQH. In terms of growth, the station's Best Prospects are consumers with Heavy radio usage who are P1 to the station but Shallow in their P1 loyalty, as well as consumers with Heavy radio usage who are not P1 listeners to the station.

   Persons who spent a Light amount of time with radio represent 41% of the cume overall but only 18% of the AQH; therefore, they are not a high-payoff target for growth.
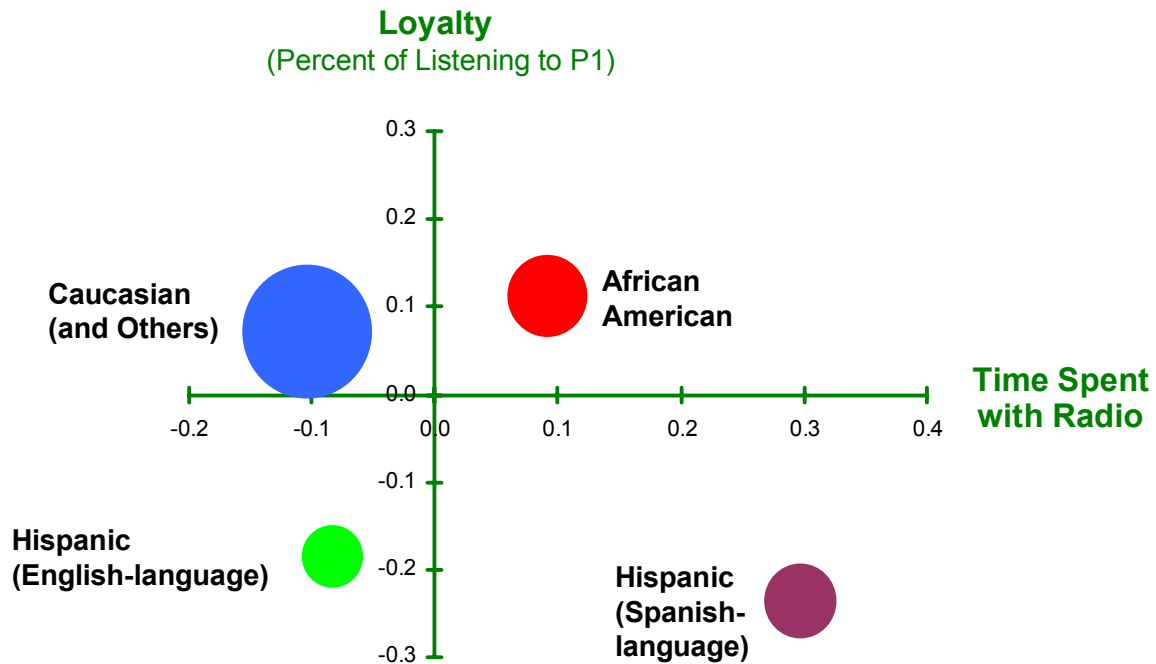
Figure 6: Heavy Deep's Contribution to AC Station's AQH

Heavy Time Spent	% of Cume	% of AQH
Deep Loyalty P1	3%	46%
Shallow Loyalty P1	2%	10%
Non-P1	54%	26%
Subtotal	59%	82%

Light Time Spent	% of Cume	% of AQH
Deep Loyalty P1	5%	6%
Shallow Loyalty P1	4%	4%
Non-P1	32%	8%
Subtotal	41%	18%

6. **Spanish-speaking and African-American consumers have the highest Time Spent with Radio, and African-American and Other consumers lead in Loyalty.** Different demographic groups occupy very different areas of intersection between the measures of Loyalty and Time Spent with Radio. In Figure 7, the point where the two lines intersect is the average. We can see that Spanish-speaking Hispanics are the heaviest users of radio. African-Americans are both heavier radio users and more loyal than average.
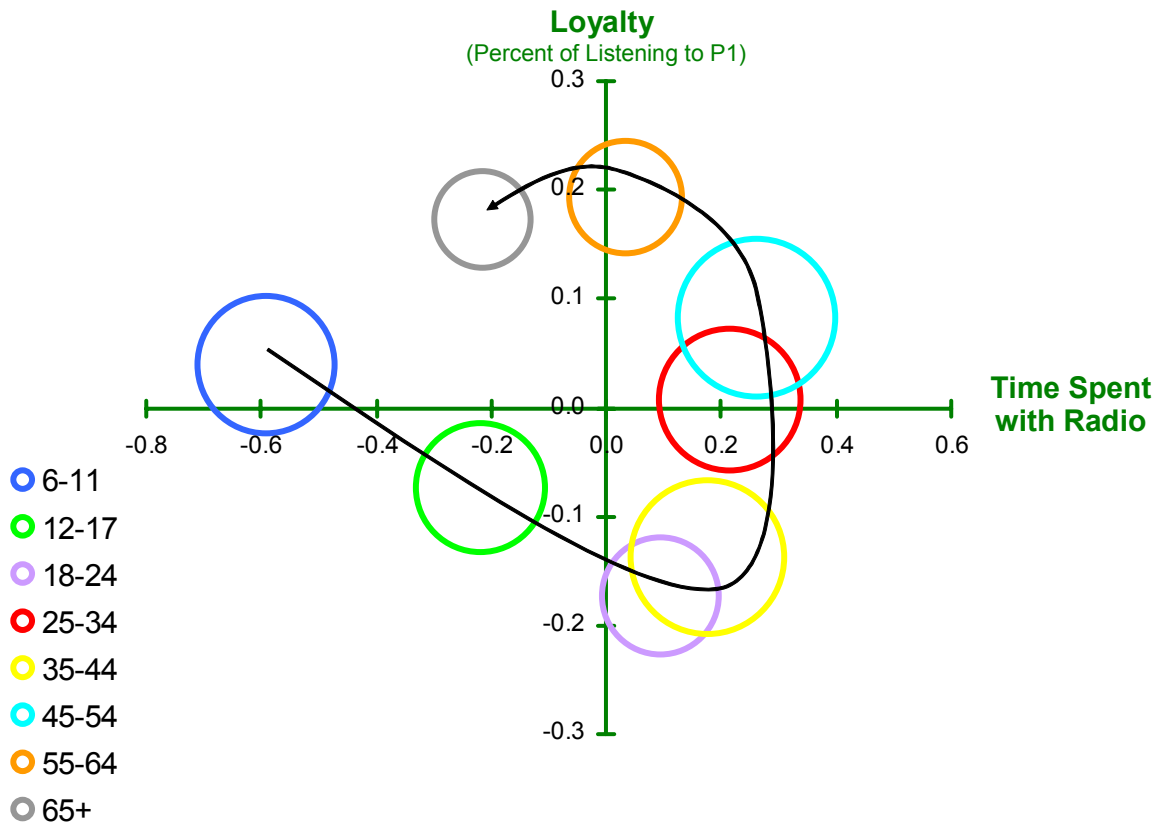
Figure 7: Loyalty and Time Spent with Radio by Race/Ethnicity

How To Read: The point where the lines cross (0,0) indicates the average Loyalty and average intensity of Time Spent with Radio. The size of the circle indicates the number of consumers in that racial/ethnic group. For example, Caucasian and Other listeners are the largest racial/ethnic group. They are slightly above average in Loyalty and below average in Time Spent with Radio.

7. **Listeners' intensity of radio usage and loyalty change with age: Persons aged 25-54 are the heaviest radio users, while the very old and the very young use radio the least.** Figure 8 illustrates the *circle of life* with radio when looking at Loyalty and Time Spent with Radio. As the age of listeners increases beyond 24 years, their Loyalty and Time Spent with Radio grows until the age of 54 years, when they begin to decrease in their time spent with radio.
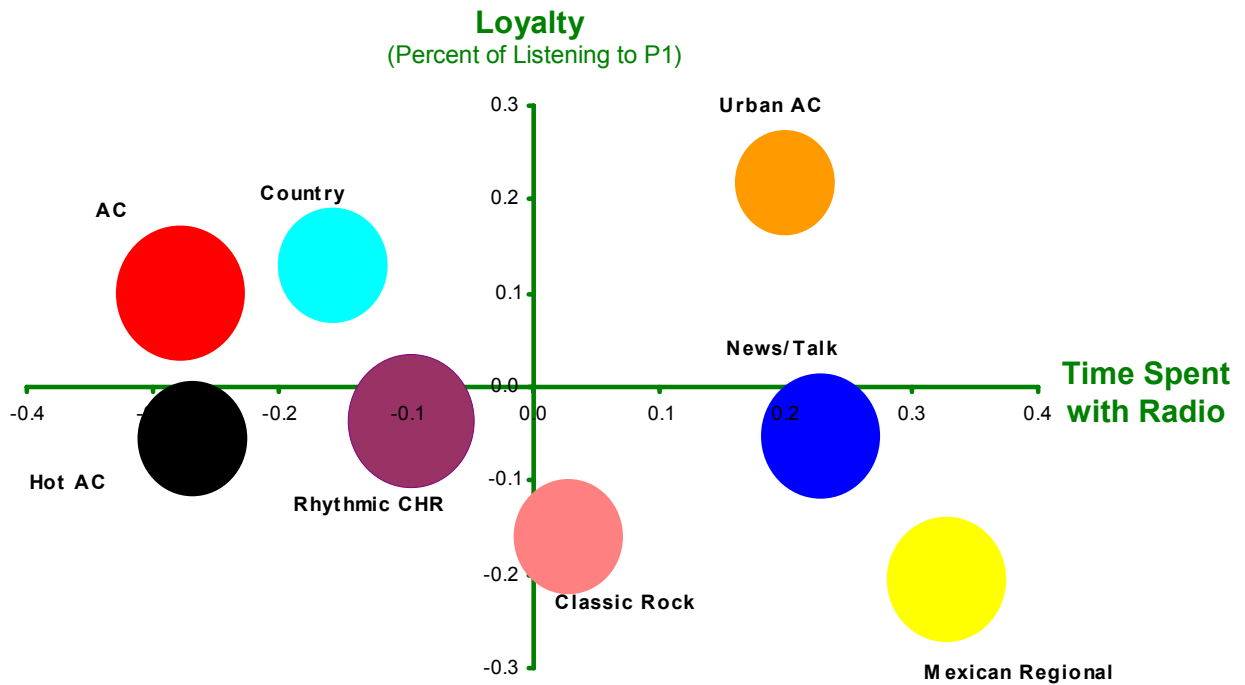
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Figure 8: Intensity of Time Spent with Radio and Loyalty by Age

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How To Read: The point where the lines cross, (0,0) indicates the average Loyalty and average intensity of Time Spent with Radio. The size of the circle indicates the number of consumers in that age group. For example, 45- to 54-year-olds are the largest age group. They are above average in Loyalty, and they are the heaviest radio listeners.

8. **Audiences who are P1 to Urban AC are the most loyal, and they are among the heaviest radio users.** Figure 9 scores the Houston radio landscape of intensity/loyalty for the top formats and their P1s. Consumers who are P1 to News/Talk and Spanish-language (Mexican/Regional) radio are heavy radio users, but not particularly loyal to their P1 stations. AC and Country P1s are less likely to be heavy radio listeners, but are slightly more loyal to their P1 station than average.
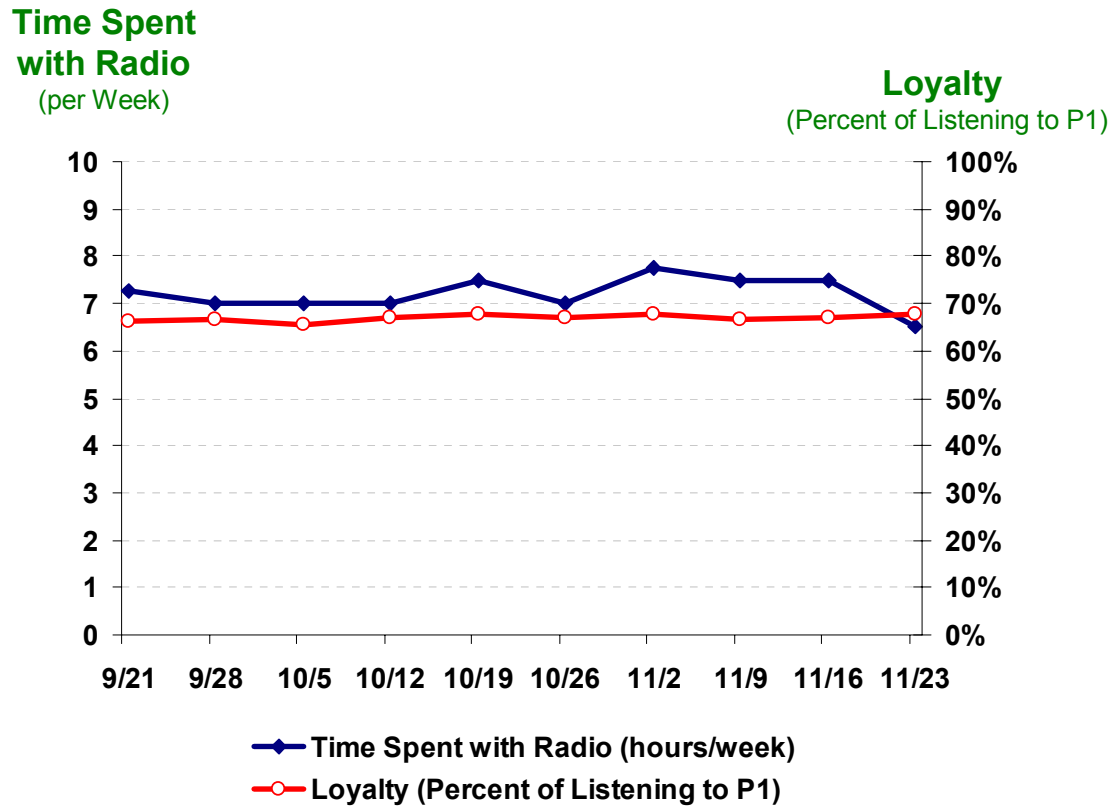
Figure 9: Loyalty and Time Spent with Radio by Select P1 Format

How To Read: The point where the lines cross (0,0) indicates the average Loyalty and average intensity of Time Spent with Radio. The size of the circle indicates the number of consumers who are P1 to that format. For example, Urban AC listeners are above average in Loyalty and in their overall Time Spent with Radio.
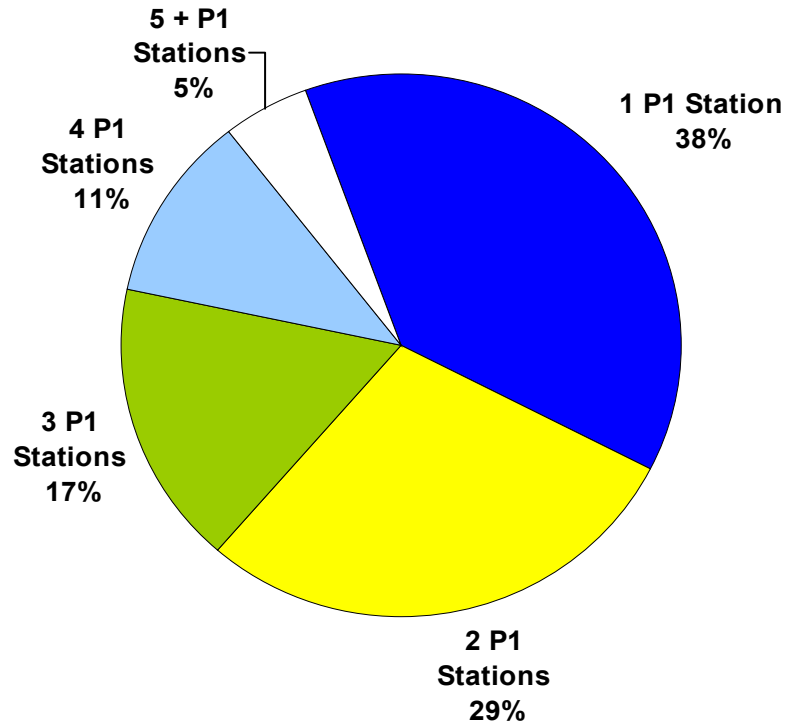
9. **Time Spent with Radio and Loyalty are highly stable over time.** Consumers consistently spend between 66% and 68% of their radio listening time with their P1 station as measured over a 10-week period. The overall amount of radio used falls within a narrow range from 7 to 8 hours per week.

Figure 10: P1 Stability by Loyalty and Time Spent with Radio Over Time (all listeners)
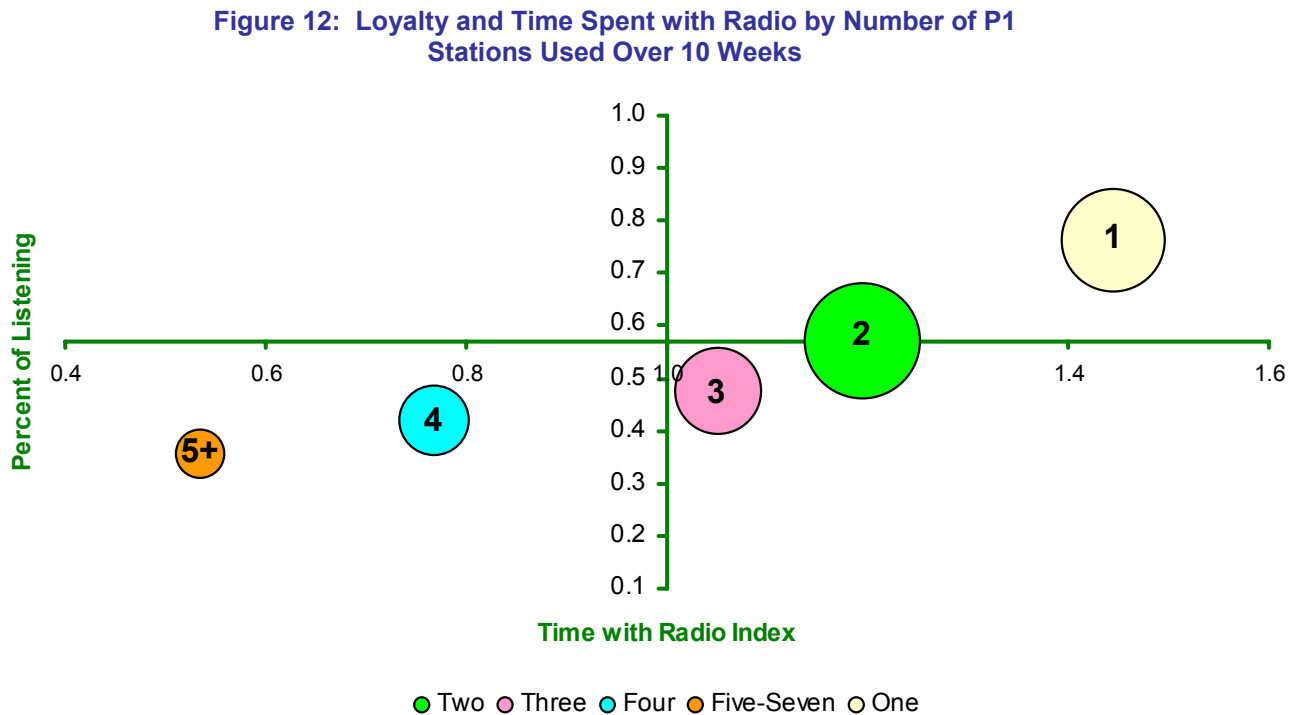
10. **Over a 10-week period, two-thirds of consumers have only one or two P1 stations.** Sixty-seven percent of Houston panelists have only one or two P1 stations over a 10-week span. Thirty-eight percent of consumers maintained the same P1 station, and 29% had two P1 stations. Seventeen percent had three different P1 stations over the 10 weeks, 11% had four different P1 stations, and only 5% had more than five different P1 stations.

**Figure 11. Number of Different P1 Stations
for Listeners During 10-Week Period**

11. **The heaviest radio listeners have the fewest number of P1 stations over time.** Listeners with consistently heavy radio usage are extremely valuable because they also have strong allegiance to their P1 stations over time. Consumers who have a single P1 station typically listen to radio 44% more than the average person. Comparatively, consumers who have more than five P1 stations in the 10-week period are much lighter radio users who spent 46% less time with radio per week. In short, consumers with a consistent P1 station over time drive the majority of radio listening.

Figure 12 shows the relationship between Loyalty and Time Spent with Radio by the number of P1 stations used over 10 weeks. Each circle in the graph represents the group which uses that number of unique P1 stations. The size of the circle corresponds to the size of the group in the panel.

Figure 12: Loyalty and Time Spent with Radio by Number of P1 Stations Used Over 10 Weeks

How to Read: People who have only one P1 station over the 10-week period dedicate 73% of their time with radio to their P1 station, and they spend 44% more time with radio than average. People who have 5 or more different P1 stations over the 10-week period dedicate only 35% of their time to their P1 station, and they spend 46% less time with radio than average.

Implications and Conclusions

1. While nearly everyone uses radio, the vast majority of listening is driven by a group of consumers who use radio more than 7 hours per week. These listeners with heavy radio usage represent only half of the population, but they generate nearly 90% of the time spent listening to radio. This group is the most important segment for radio managers. The other half of the population has far less impact because they are light users who contribute a small percentage of Average Quarter-Hour listening.

2. Listeners with heavy overall radio usage drive more than 80% of a station's ratings. Within that listening group, an even smaller group (2%-3% of cume) drives the health of the station because they contribute nearly half of the listening. Stations with a healthy Prime P1 audience—listeners with deeply loyal and heavy usage—are more likely to outperform in the ratings. Therefore radio managers should use research and marketing to identify, target and build interactive and ongoing relationships with Prime P1s, and adjust their programming to appeal to these key listeners.

3. On-air and off-air messaging strategies should be specifically designed to reinforce your brand's importance in the lives of your Prime P1s. Learn the key issues and challenges for these crucial listeners and be sure everyone at the station knows their psycho-graphic profile.

4. Attract and convert Best Prospects—heavy radio users who are not yet loyal to your station—through content that resonates with their emotions, beliefs and lifestyles. Avoid attempting to reach and appeal to all consumers through shotgun mass-marketing, broad research programs and general quarter-hour tactics.

5. Radio advertisers should consider using P1 as a tool to optimize their radio advertising. First preference listeners spend a significant amount of time with their P1 station and are the audience who will be exposed most often to ads on the station. These committed listeners are more likely to be engaged with the station's programming and the advertiser's messages. Plus, these consumers are not readily available on other stations. The AQH rating for a station tells only a part of the story. PPM measurement reveals that stations have unique groups of loyal P1 listeners who can be more responsive to an advertiser's message.

Appendix A: Data Description and Assumptions

In this study, an estimated 11.1% share is not reflected in the PPM data set as a result of some stations not encoding. Four of these stations represented an estimated at 9.8% share in the last diary measurement. Approximately half of the total Country format listening was not encoded during the time span covered in this study.

Table 1: Estimated Diary Share from Non-Encoded Stations

Station	Format	Share
KKBQ-FM	Country	3.0
KTHT-FM	Country	2.7
KLDE-FM	Classic Hit	2.2
KHPT-FM	80s Hits	1.9
Various		1.3
Estimated missing shares		**11.1**

About dmr

dmr is the leading provider of strategic marketing consulting and services for the broadcast industry. For nearly two decades, dmr has led the industry in fully integrated off-line and Web-enabled direct marketing solutions that include precision-targeted, multi-contact direct marketing campaigns using telephony, direct mail, e-mail and database marketing services.

About The University of Wisconsin A.C. Nielsen Center

The University of Wisconsin-Madison's A.C. Nielsen Center for Marketing Research is a world-class, innovative leader in the study of marketing research. Since the Center's founding in 1990, students have enjoyed focused, small-group study led by skilled instructors and opportunities for hands-on work to hone their skills and build their marketability. Internships and project assistantships at powerhouse corporations ensure that theories and methods learned in the classroom are supported, expanded upon and applied in real-world business situations.

About Arbitron

Arbitron Inc. (NYSE: ARB) is an international media and marketing research firm serving the media (radio, television, cable, online radio and out-of-home), as well as advertising and advertising agencies in the United States and Europe. Arbitron's core businesses are measuring network and local market radio audiences across the United States; surveying the retail, media and product patterns of local market consumers; and providing application software used for analyzing media audience and marketing information data. The Company has developed the Arbitron Portable People Meter™, a new technology for media and marketing research.

Arbitron's marketing and business units are supported by a world-renowned research and technology organization located in Columbia, Maryland. Arbitron has approximately 1,900 employees; its executive offices are located in New York City.

Through its Scarborough Research joint venture with The Nielsen Company, Arbitron provides additional media and marketing research services to the broadcast television, newspaper and online industries.

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