

1999 Holiday Listening Study

How America
Listens to Radio

ARBITRON

Introduction

The Holiday Listening Study compared and contrasted 12+ hour-by-hour AQH listening patterns during four national holidays with those of typical weekdays and weekends in the top 25 markets. The holidays examined in the study were: Memorial Day, Fourth of July, Labor Day and Thanksgiving Day. The typical weekend and weekday data were drawn from the Spring 1998 survey, while specific holiday data were based on listening estimates for the four holiday dates in 1998. This study found that holidays garner higher audience levels than typical weekends, especially during the midday hours, with peak holiday listenership occurring at 12:00 Noon.

Arbitron's Holiday Listening Study shows that radio listening changes from weekend to holidays, and both weekend and holiday listening is vastly different from normal weekday listening patterns. The greatest percentage of at-home listening is spent on weekends, while Thanksgiving garners more at-home listening than any other holiday. Not surprisingly, the Adults 18-34 demo has a greater percentage of away-from-home listening than the Persons 12+ or the Adults 25-54 demo. Overall listening is highest during the normal weekday. However, holidays attract considerably more listening than does the typical weekend. The highest level of listening tends to occur in the early afternoon hours for all of the holidays as well as weekends.

Contents

Persons 12+ Listeners	3
Weekday Listening	3
Weekend Listening	3
Memorial Day Listening	4
Fourth of July Listening	4
Labor Day Listening	5
Thanksgiving Day Listening	5
Adults 18-34	6
Weekday Listening	6
Weekend Listening	6
Memorial Day Listening	7
Fourth of July Listening	7
Labor Day Listening	8
Thanksgiving Day Listening	8
Adults 25-54	9
Weekday Listening	9
Weekend Listening	9
Memorial Day Listening	10
Fourth of July Listening	10
Labor Day Listening	11
Thanksgiving Day Listening	11
Markets Used	12

Persons 12+ Listeners

Among P12+ listeners, weekdays peak at an AQH PUR of 26.1, while weekends and the average holiday peak at 18.1 and 20.2, respectively. During a typical weekend, at-home listening never drops below 50% of total listening. In general, P12+ holiday listening looks like weekend listening except for holidays receiving slightly higher peaks.

Percent of Listening

- At Home
- Away from Home

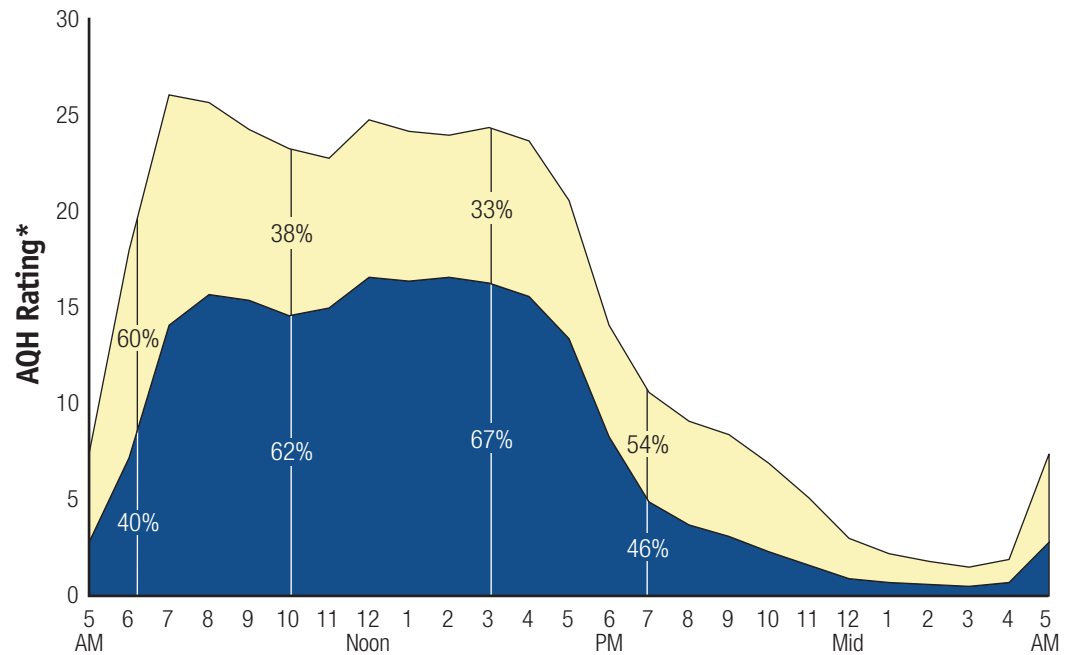
Weekday

Spring 1998, Monday-Friday, Total Day (5AM-5AM)

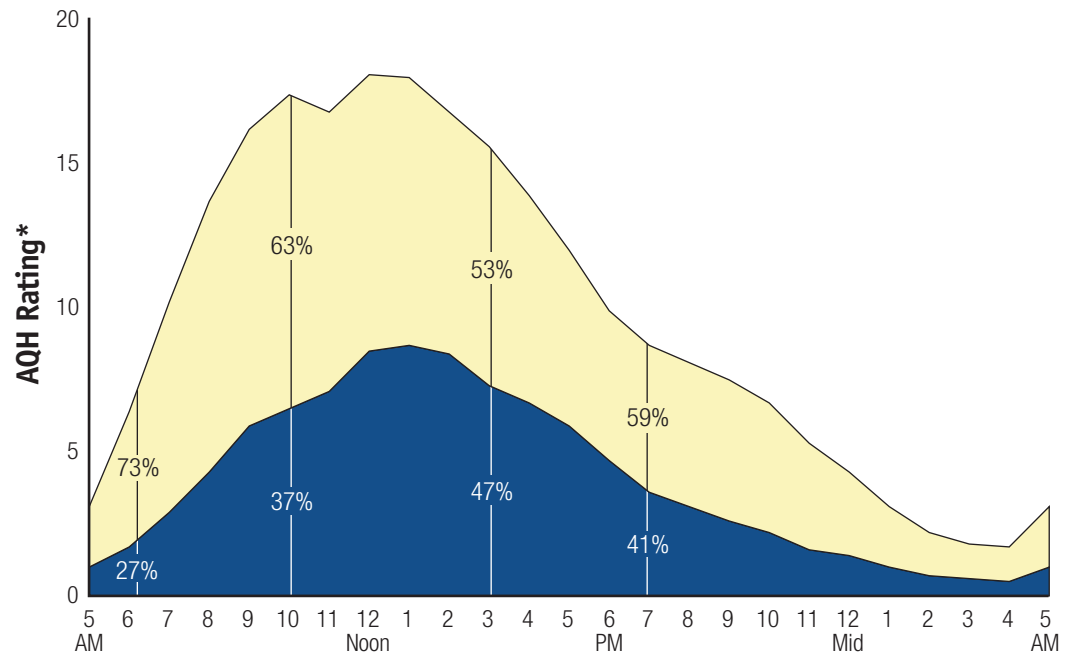
Weekend

Spring 1998, Saturday & Sunday, Total Day (5AM-5AM)

* Persons Using Radio in Top 25 Markets



Typical Weekday Listening



Typical Weekend Listening

Persons 12+ Listeners

Memorial Day and Labor Day both experience greater percentages of away-from-home listening than weekends do between 6AM and 7PM. The Fourth of July holiday looks like a typical weekend except for the evening hours when fireworks are on display. July 4th listeners have a much greater percentage of away-from-home listening during firework hours.

Percent of Listening

- At Home
- Away from Home

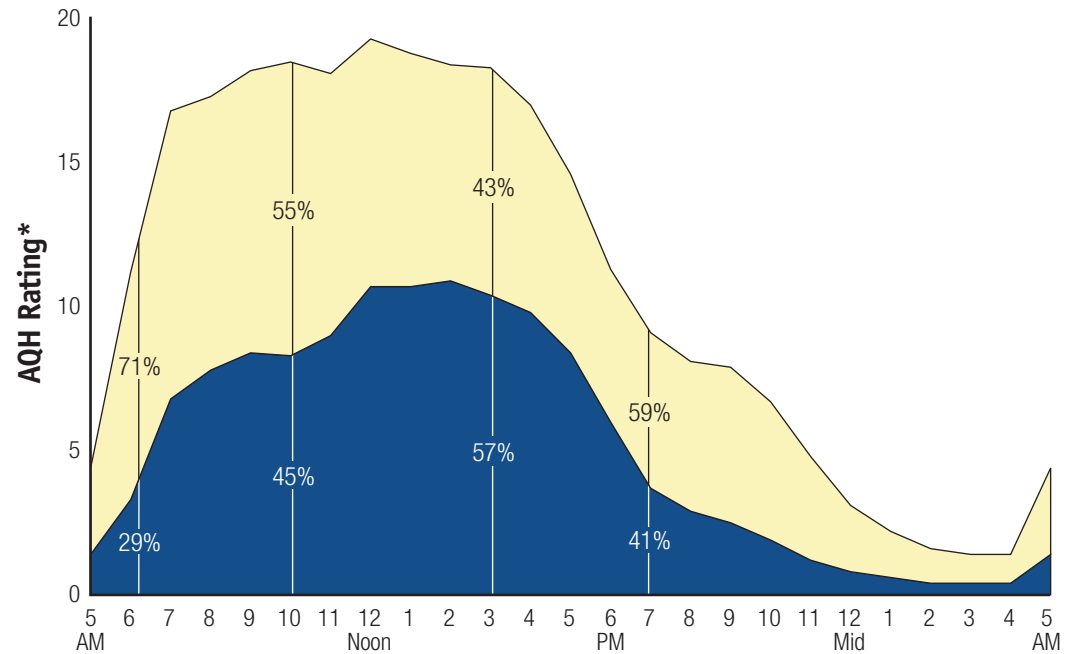
Memorial Day

Monday, May 25, 1998,
Listening, Total Day (5AM-5AM)

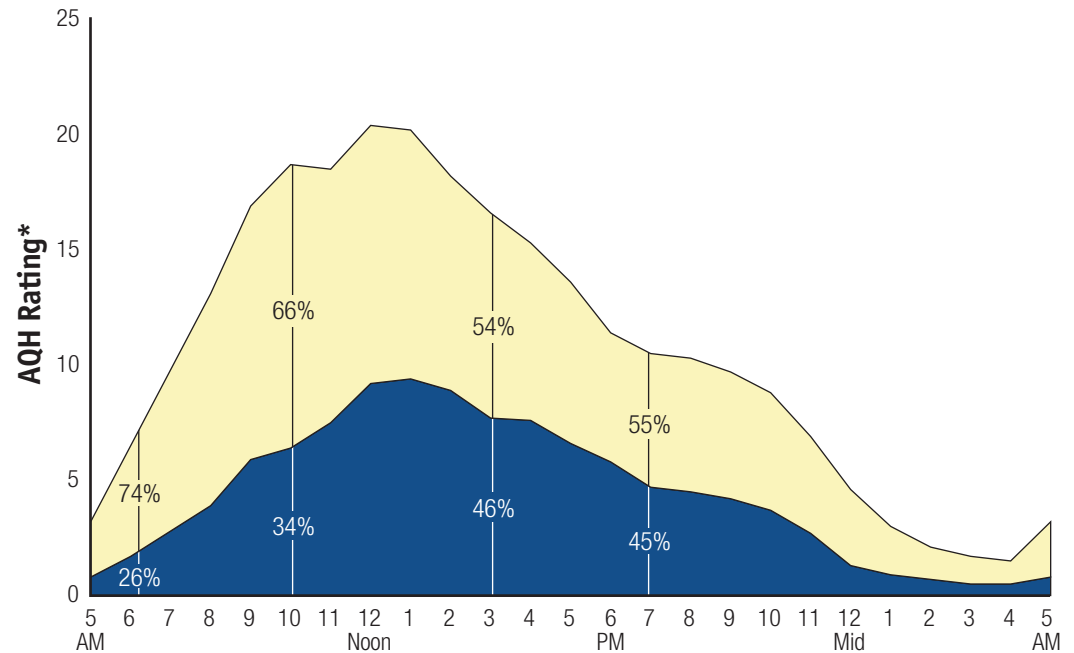
Fourth of July

Saturday, July 4, 1998,
Listening, Total Day (5AM-5AM)

* Persons Using Radio in Top 25 Markets



Memorial Day Listening



Fourth of July Listening

Persons 12+ Listeners

Thanksgiving retains the highest peak listening of any of the holidays, with peak time coming at noon. Just like the Fourth of July, Thanksgiving also has a high percentage of at-home listening.

Percent of Listening

- At Home
- Away from Home

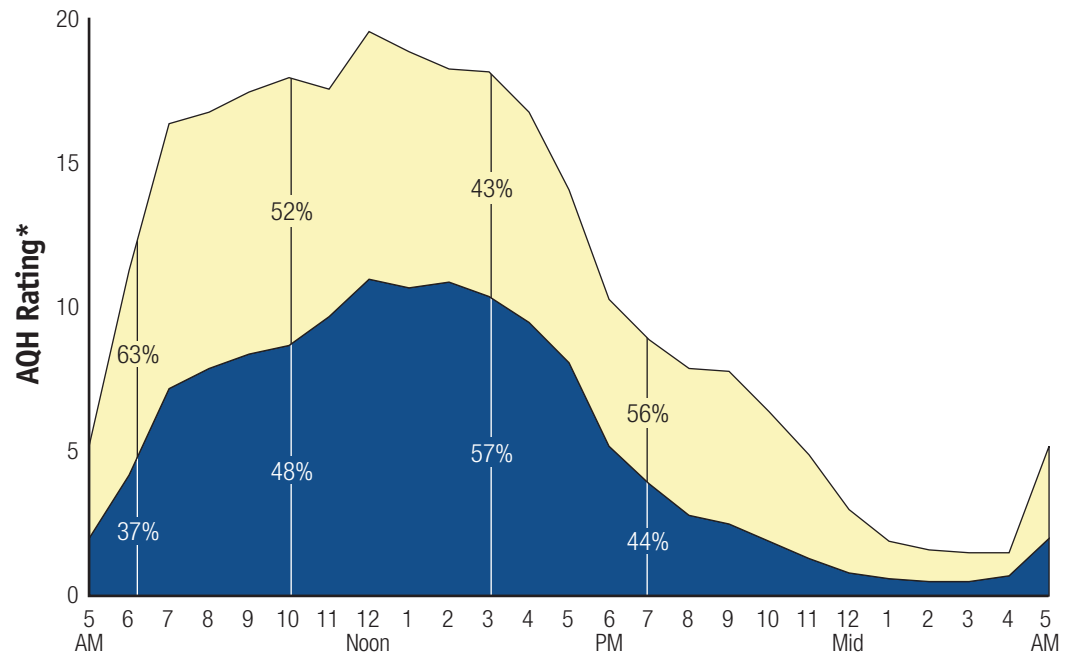
Labor Day

Monday, September 7, 1998,
Listening, Total Day (5AM-5AM)

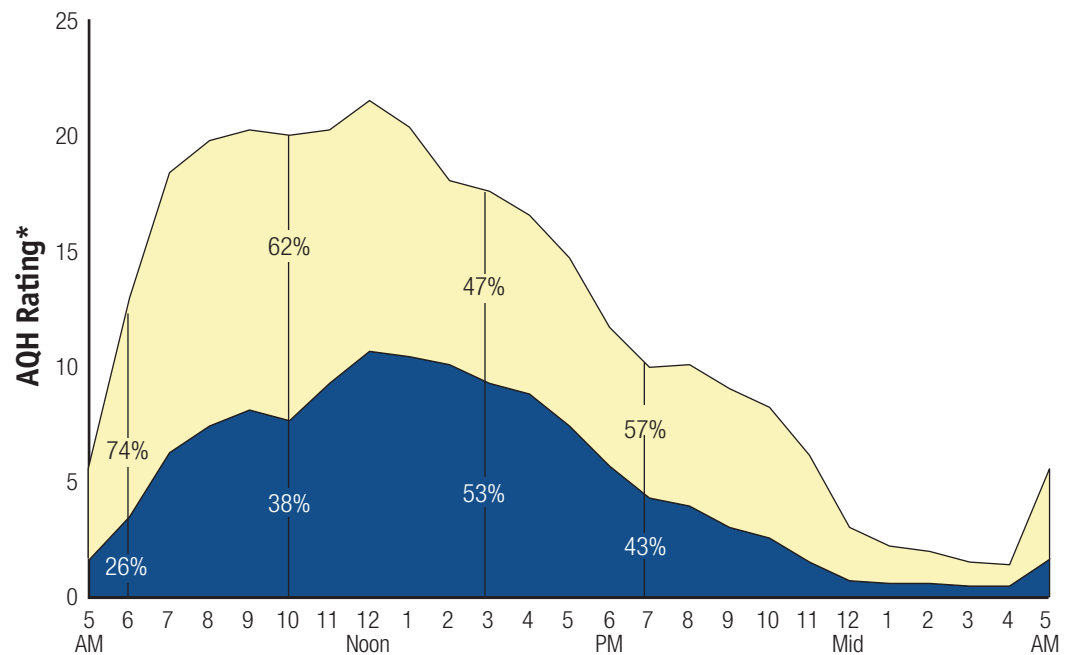
Thanksgiving

Thursday, November 26, 1998,
Listening, Total Day (5AM-5AM)

* Persons Using Radio in Top 25 Markets



Labor Day Listening



Thanksgiving Day Listening

Adults 18-34

Listening among Adults 18-34 peaks at 27.1 AQH PUR for weekdays, while peaking at 19.0 on weekends and 21.7 (average holiday peak) on holidays. Note that these peaks are somewhat higher than they were for Persons 12+. Adults 18-34 had significantly more away-from-home listening during typical weekdays and weekends as well as Thanksgiving than did the P12+ demo.

Percent of Listening

- At Home
- Away from Home

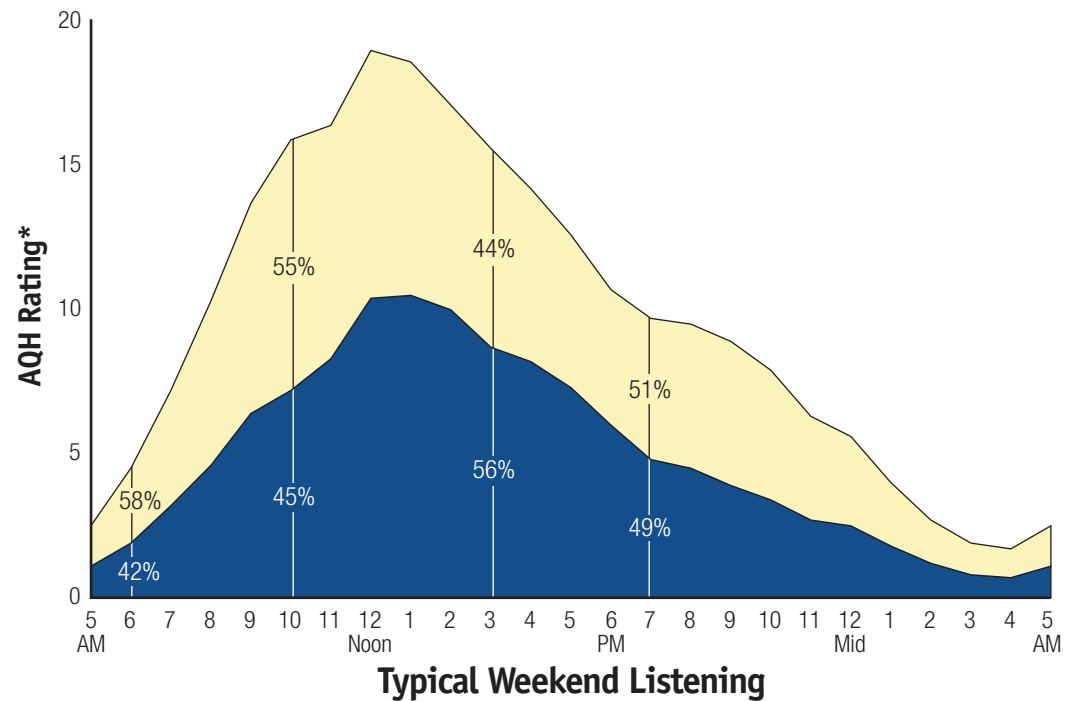
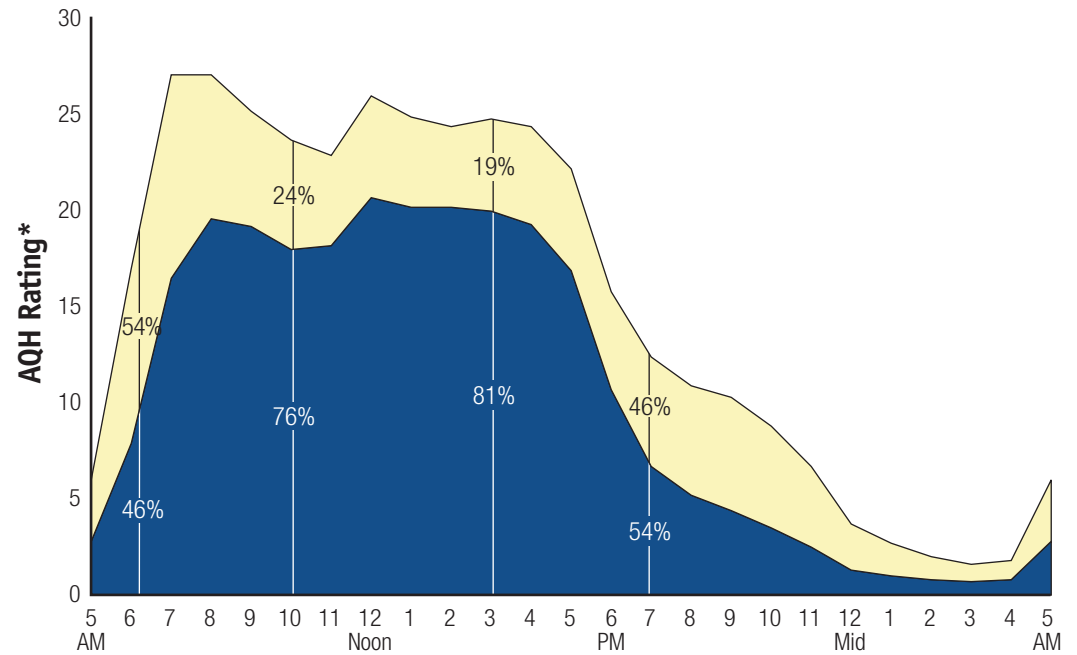
Weekday

Spring 1998, Monday-Friday, Total Day (5AM-5AM)

Weekend

Spring 1998, Saturday & Sunday, Total Day (5AM-5AM)

* Persons Using Radio in Top 25 Markets



Adults 18-34

Like the P12+ demo, during the Fourth of July, 18-34 listening tends to mimic the same pattern as weekend listening except for the evening hours when away-from-home listening declines as you get closer to mid-night.

Percent of Listening

- At Home
- Away from Home

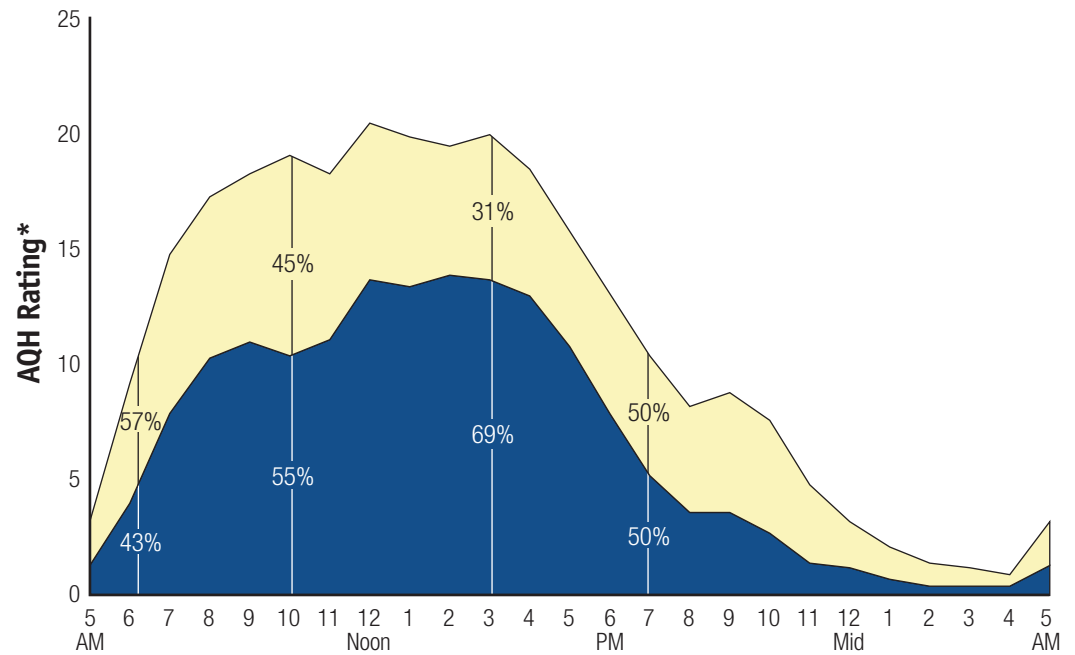
Memorial Day

Monday, May 25, 1998,
Listening, Total Day (5AM-5AM)

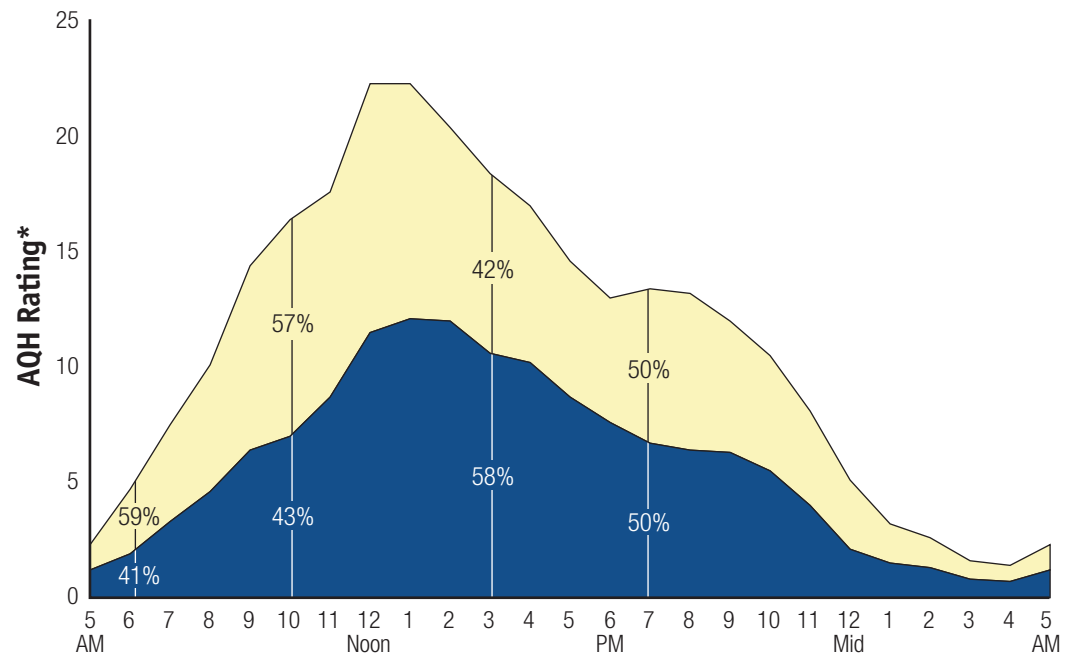
Fourth of July

Saturday, July 4, 1998,
Listening, Total Day (5AM-5AM)

* Persons Using Radio in Top 25 Markets



Memorial Day Listening



Fourth of July Listening

Adults 18-34

Labor Day has a tremendous percentage of away-from-home listening from 5AM to 7PM, while Memorial Day maintains a much higher at-home listening percent than Labor Day during the morning hours. Thanksgiving had a greater at-home percentage than the typical weekend beginning at 7PM.

Percent of Listening

At Home
 Away from Home

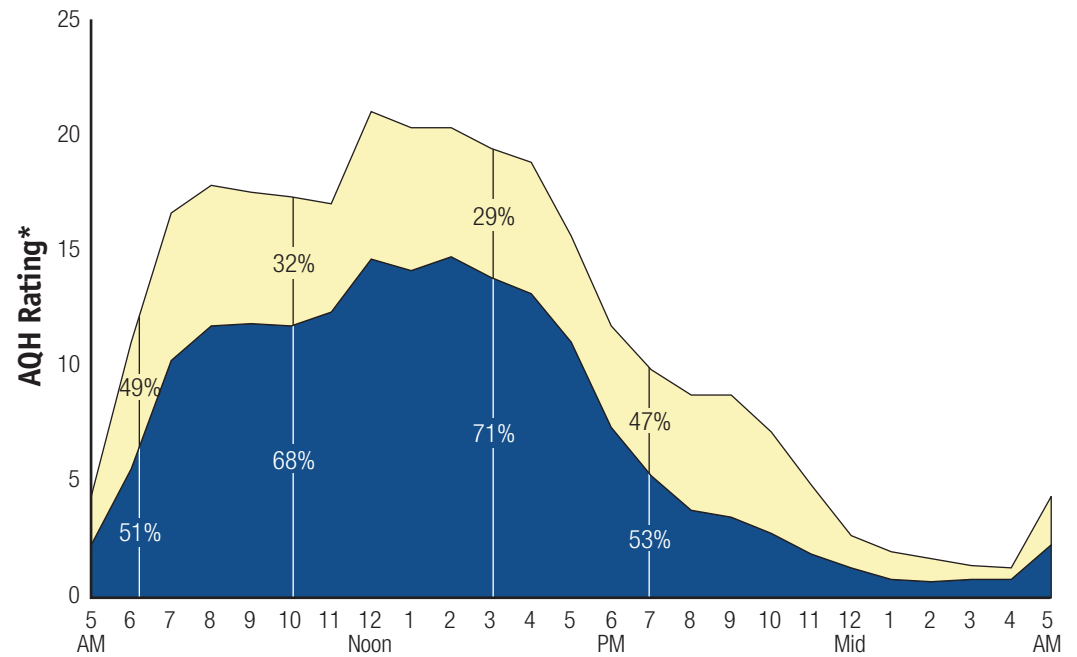
Labor Day

Monday, September 7, 1998,
Listening, Total Day (5AM-5AM)

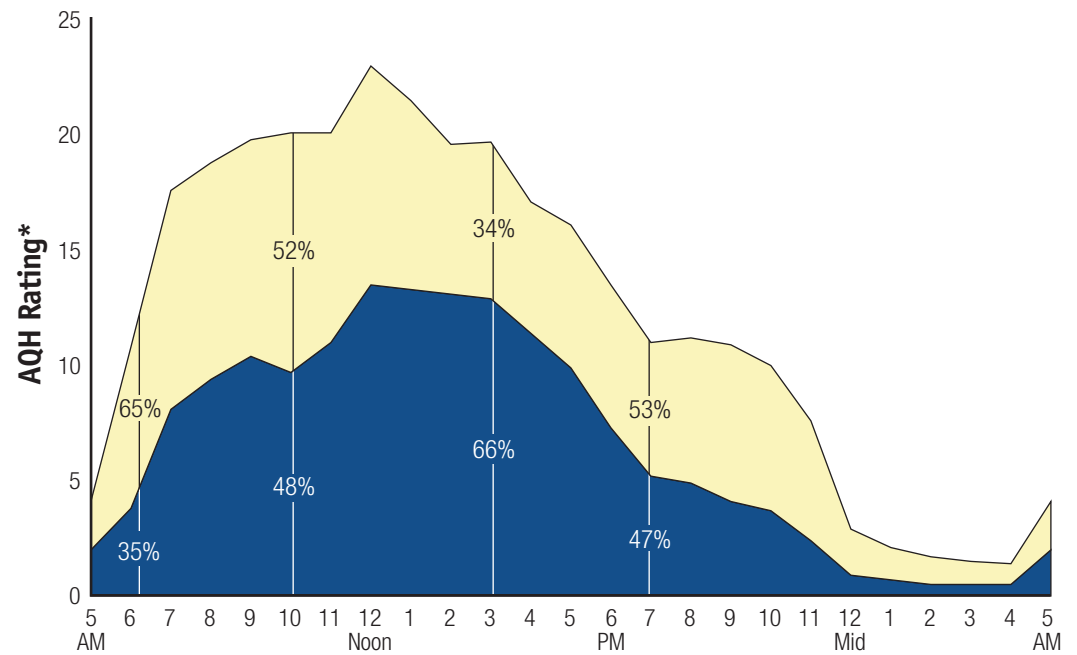
Thanksgiving

Thursday, November 26, 1998,
Listening, Total Day (5AM-5AM)

* Persons Using Radio in Top 25 Markets



Labor Day Listening



Thanksgiving Day Listening

Adults 25-54

Listening among Adults 25-54 peaks at 30.3 AQH PUR for weekdays, while peaking at 18.2 on weekends and 20.9 (average holiday peak) on holidays. The Adults 25-54 demo tends to fall in-between Persons 12+ and Adults 18-34 in relation to percentage of listening at home and away from home.

Percent of Listening

- At Home
- Away from Home

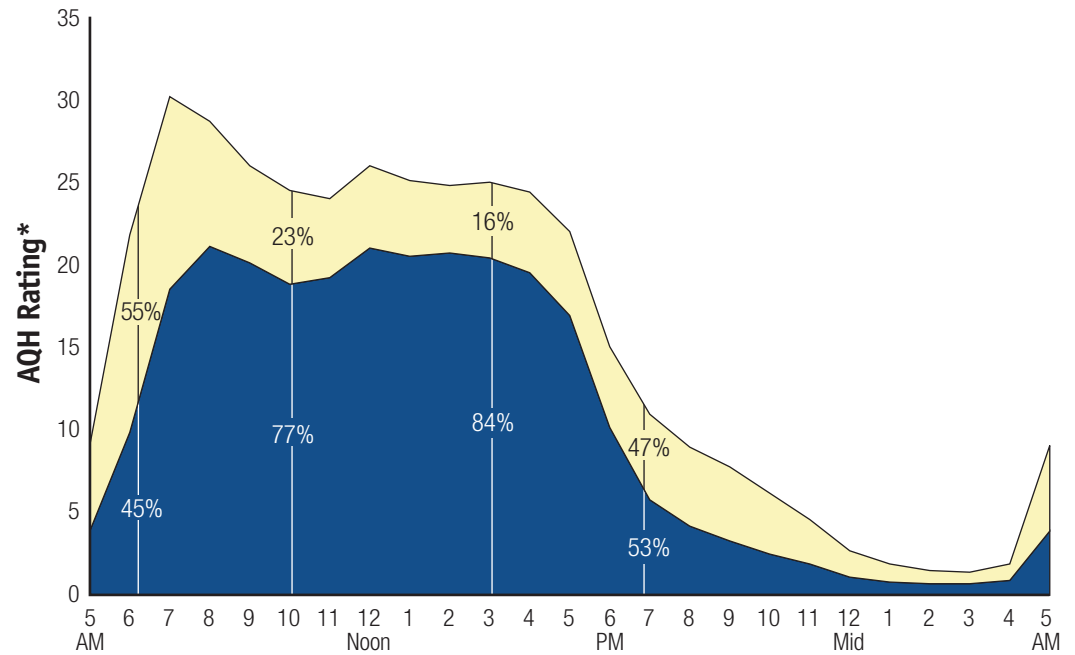
Weekday

Spring 1998, Monday-Friday,
Total Day (5AM-5AM)

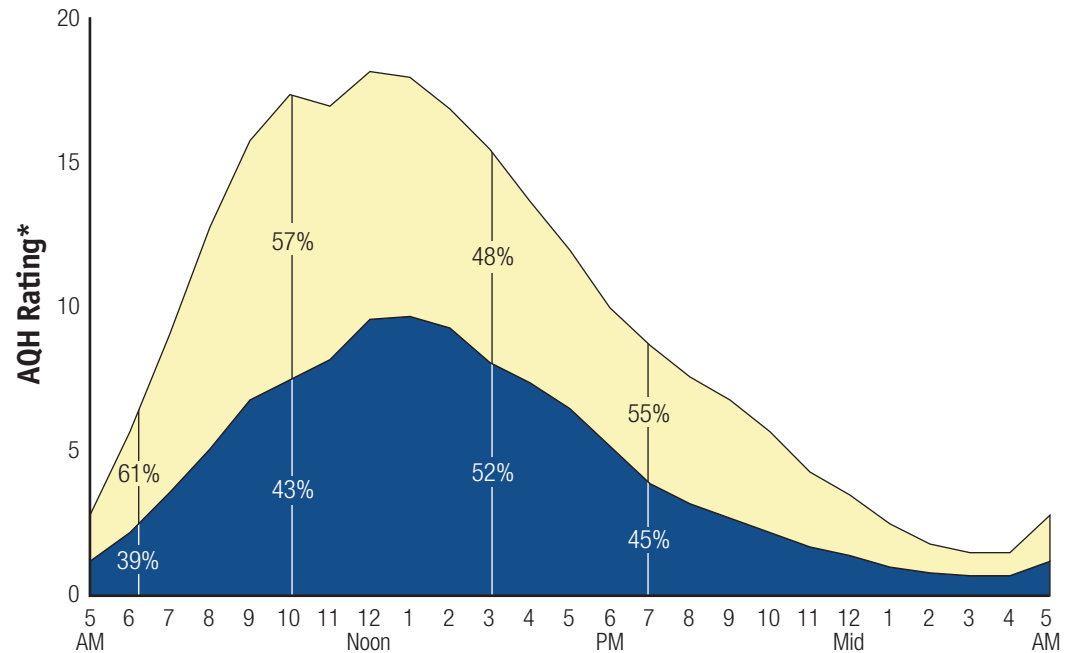
Weekend

Spring 1998, Saturday &
Sunday, Total Day (5AM-5AM)

* Persons Using Radio in Top 25 Markets



Typical Weekday Listening



Typical Weekend Listening

Adults 25-54

Memorial Day looks a lot like Labor Day except for slightly less away-from-home listening. Adults 25-54 listen away from home more than Persons 12+ do during both the Fourth of July and Thanksgiving holidays. The Fourth of July looks like a typical weekend until the fireworks start. After the fireworks start, the away-from-home listening percentage remains around 50% compared to around 40% for a typical weekend.

Percent of Listening

- At Home
- Away from Home

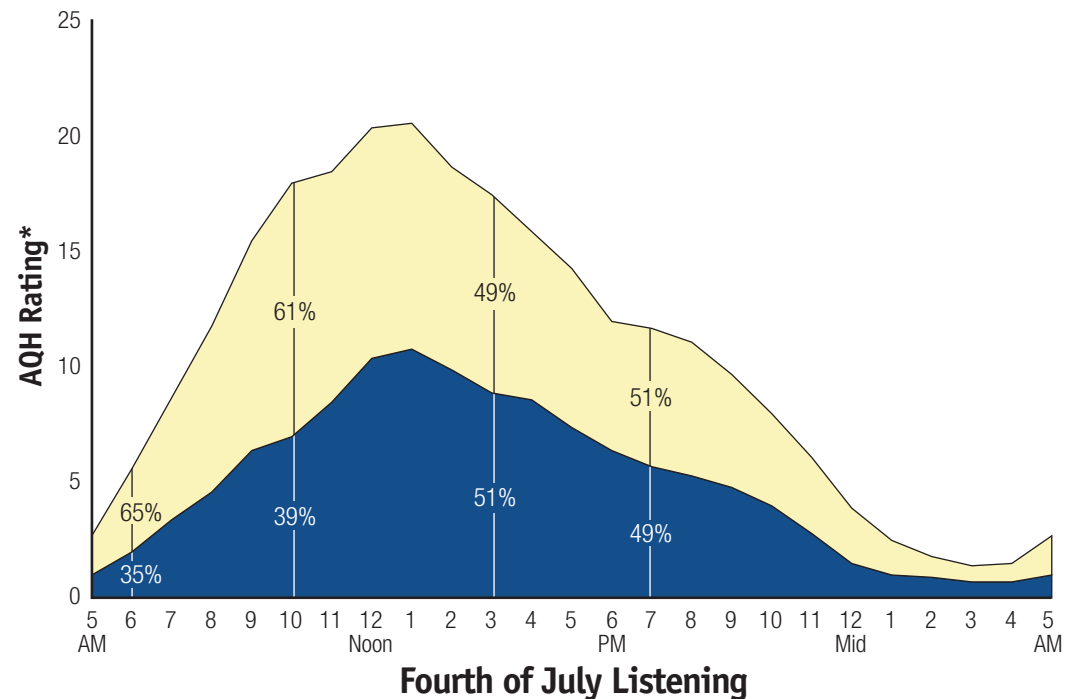
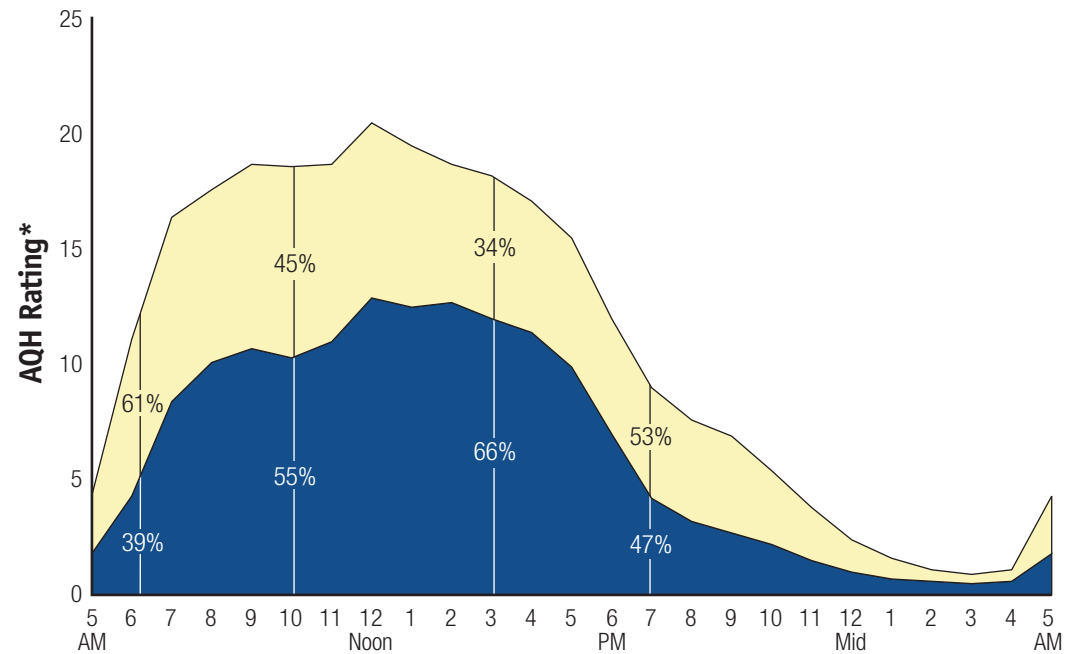
Memorial Day

Monday, May 25, 1998,
Listening, Total Day (5AM-5AM)

Fourth of July

Saturday, July 4, 1998,
Listening, Total Day (5AM-5AM)

* Persons Using Radio in Top 25 Markets



Adults 25-54

Away-from-home listening remains strong during Labor Day until 8:00PM.

Percent of Listening

- At Home
- Away from Home

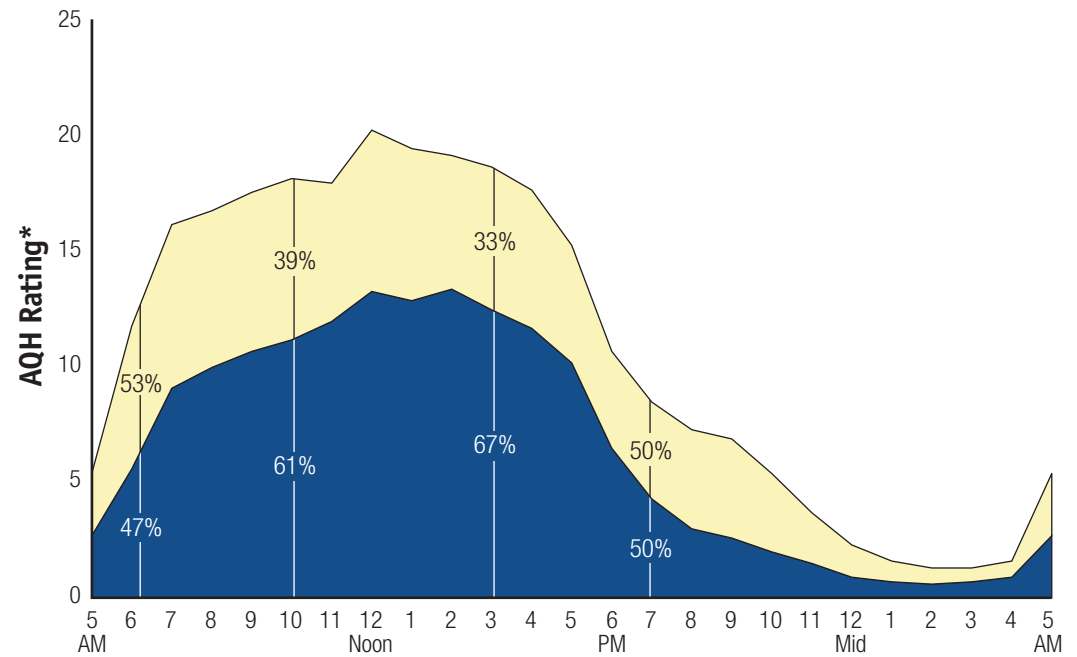
Labor Day

Monday, September 7, 1998,
Listening, Total Day (5AM-5AM)

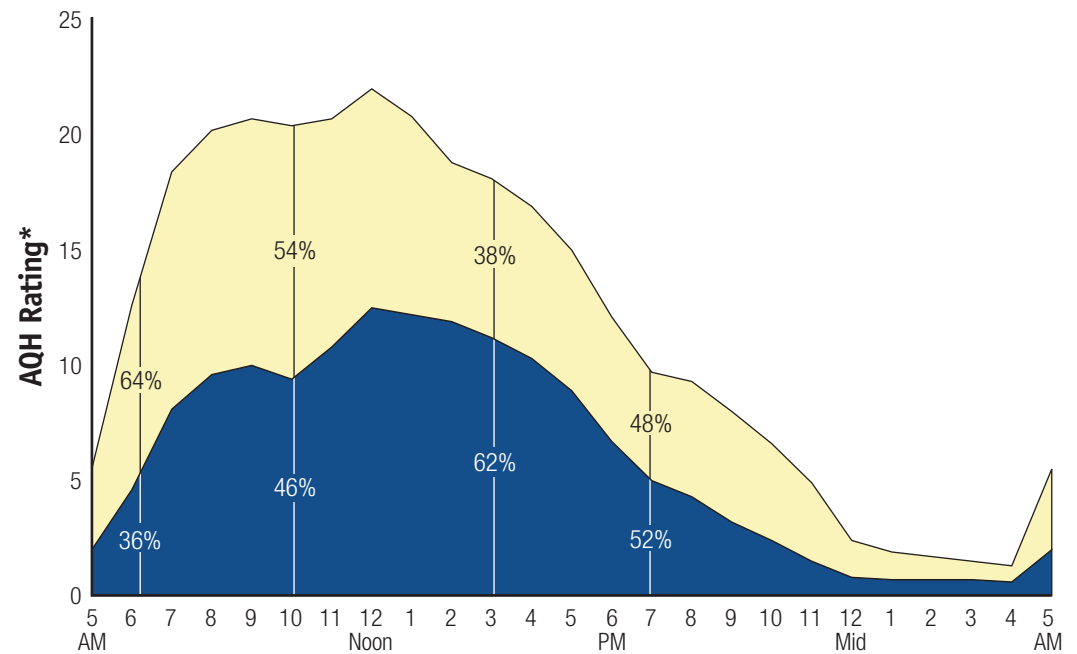
Thanksgiving

Thursday, November 26, 1998,
Listening, Total Day (5AM-5AM)

* Persons Using Radio in Top 25 Markets



Labor Day Listening

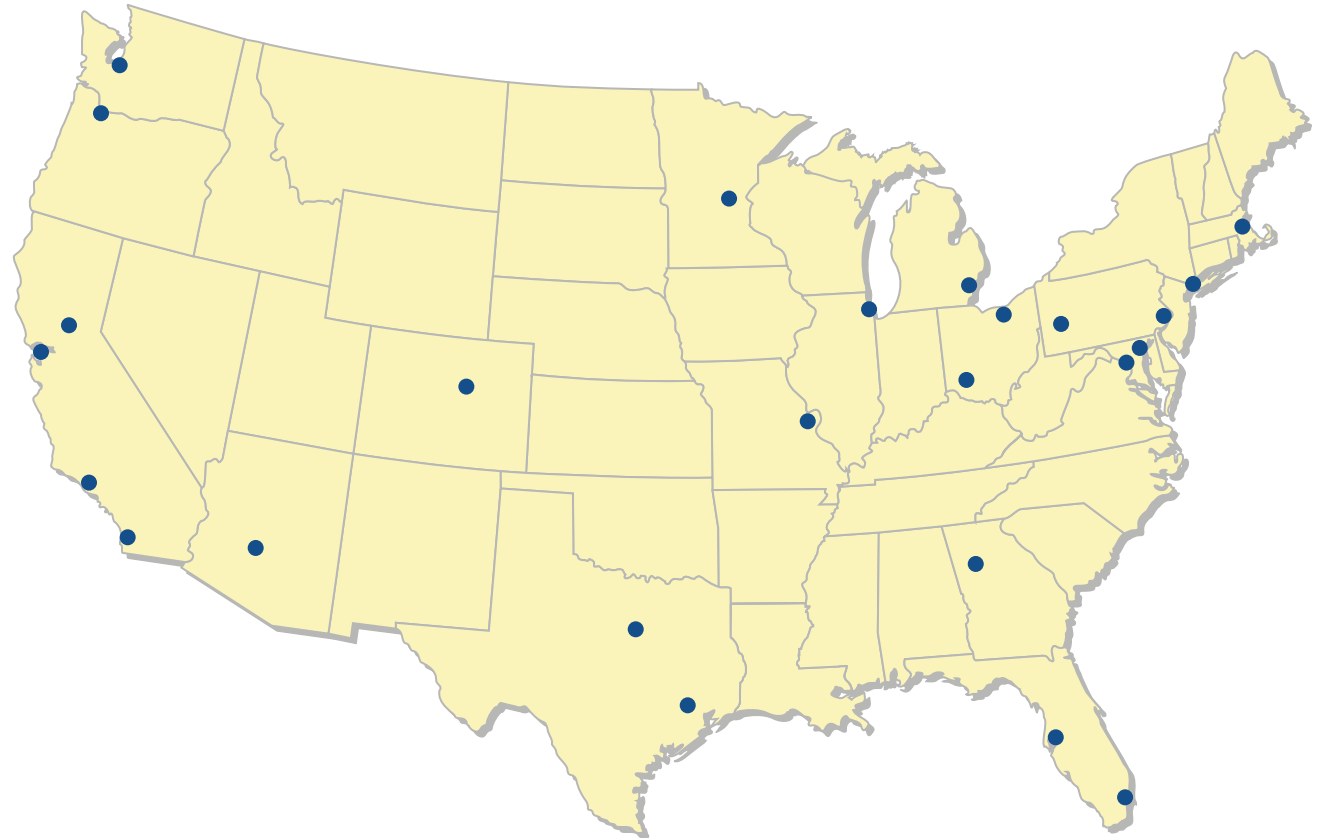


Thanksgiving Day Listening

Markets Used*

- Atlanta
- Baltimore
- Boston
- Chicago
- Cincinnati
- Cleveland
- Dallas-Ft. Worth
- Denver-Boulder
- Detroit
- Houston-Galveston
- Los Angeles
- Miami-Ft. Lauderdale-Hollywood
- Minneapolis-St. Paul
- New York
- Philadelphia
- Phoenix
- Pittsburgh
- Portland, OR
- Sacramento
- San Diego
- San Francisco
- Seattle-Tacoma
- St. Louis
- Tampa-St. Petersburg-Clearwater
- Washington, DC

** San Jose and Nassau-Suffolk are embedded Metros and were excluded.*





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