

An acoustic guitar is positioned vertically on the left side of the slide, partially overlapping a blue and purple gradient background. The guitar's body is a light wood color, and its neck is dark wood with frets. The background features several overlapping, glowing white circles of varying sizes, creating a sense of motion and depth.

# **Country Radio Seminar**

**Top Country Arbitron Performers**

**Bob Michaels, Vice President  
Radio Programming Services**



# Agenda

- **What is a Top Performer?**
- **Quick Review of Arbitron Estimates**
- **Traits of Top Country Performers**
- **Effect of 2000 Census on Country Radio**
- **Summary**
- **Discussion**

# What is a Top Performer?

## Criteria:

- **Scan the Continuous Measurement markets and rank the stations based on the AQH share of P25-44**
  - » Market Rank 1-10: Station must be in Top 7
  - » Market Rank 11-50: Station must be in Top 5
  - » Market Rank 51+: Station must be in Top 3
- **Same rules used in PD Advantage<sup>®</sup> 4.0**
  - » Spring 2002 Arbitron-rated Continuously Measured metros included

**Market:** KNOXVILLE

**Survey:** FA02

**Geography:** Metro

**Target Station:** WIVK - FM

**Daypart:** M-Su 6:00AM - 12:00M

**Format:** Country (Mainstream)

**Norms Based On:** SPRING 2002

**Ethnic:**

**Language Pref:**

## # 2 - How do my Vital Signs compare against National Averages and Top Performers?

	Nat Avg	WIVK-FM	Top Perf	Nat Avg	WIVK-FM	Top Perf	Nat Avg	WIVK-FM	Top Perf
<b>Target Demo</b>	<b>P12+</b>			<b>P25-44</b>			<b>P25-54</b>		
<b>Estimates</b>									
Share	3.7%	20.8%	8.3%	3.6%	18.9%	8.5%	3.7%	18.2%	8.6%
TSL	7:30	9:30	8:45	7:00	9:45	9:15	7:45	9:30	9:30
Tune-Ins	5.5	6.9	6.5	5.4	7.0	6.8	5.6	7.0	6.8
Time Spent Per Tune-In	1:21	1:23	1:21	1:18	1:23	1:23	1:19	1:22	1:22
<b>Listening Locations</b>									
% AQH Home	37%	37%	33%	27%	29%	26%	28%	29%	27%
% AQH In-Car	36%	37%	36%	40%	38%	37%	39%	39%	37%
% AQH at Work	25%	23%	28%	31%	31%	36%	31%	29%	34%
% AQH Other	2%	2%	2%	2%	2%	2%	2%	3%	2%
<b>P1 Information</b>									
% P1 Cume	39%	52%	46%	34%	54%	45%	36%	52%	45%
% P1 AQH	72%	82%	79%	67%	81%	77%	69%	81%	77%
P1 TSL	14:30	15:15	15:15	13:15	14:45	16:30	14:45	15:00	16:00
100+ QHs (% of diaries)	6.8%	10.5%	8.9%	6.1%	9.4%	9.7%	6.9%	9.5%	9.8%

# What is Country?

- The “Country” formats:
  - » New Country
  - » Classic Country
  - » Mainstream Country



# What is Country?

- The “Country” formats:
  - » New Country
  - » Classic Country
  - » Mainstream Country
- We’ll use the Mainstream Country stations in our evaluation.
  - *52 Top Performers*
  - *212 total stations*

What did you listen to?

How long did you listen?



$$= \frac{\text{Tune-Ins}}{\text{Time Spent Per Tune-In}}$$

These two estimates  
combine to  
give you...

**Marketing**

- Advertising
- Direct Mail
- Events

**Programming**

- Contests
- Compelling Content

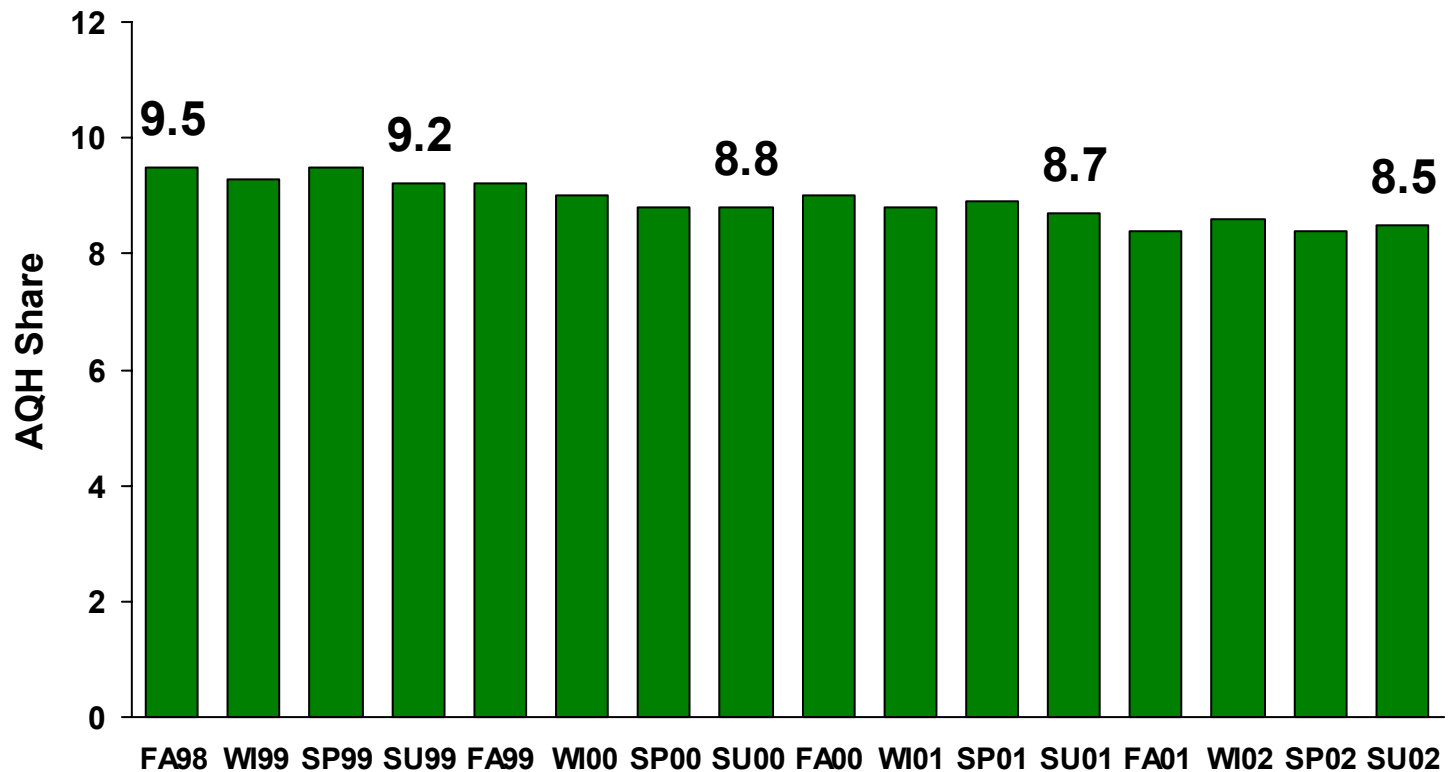


$$\frac{\text{AQH Persons}}{\text{Population}} =$$

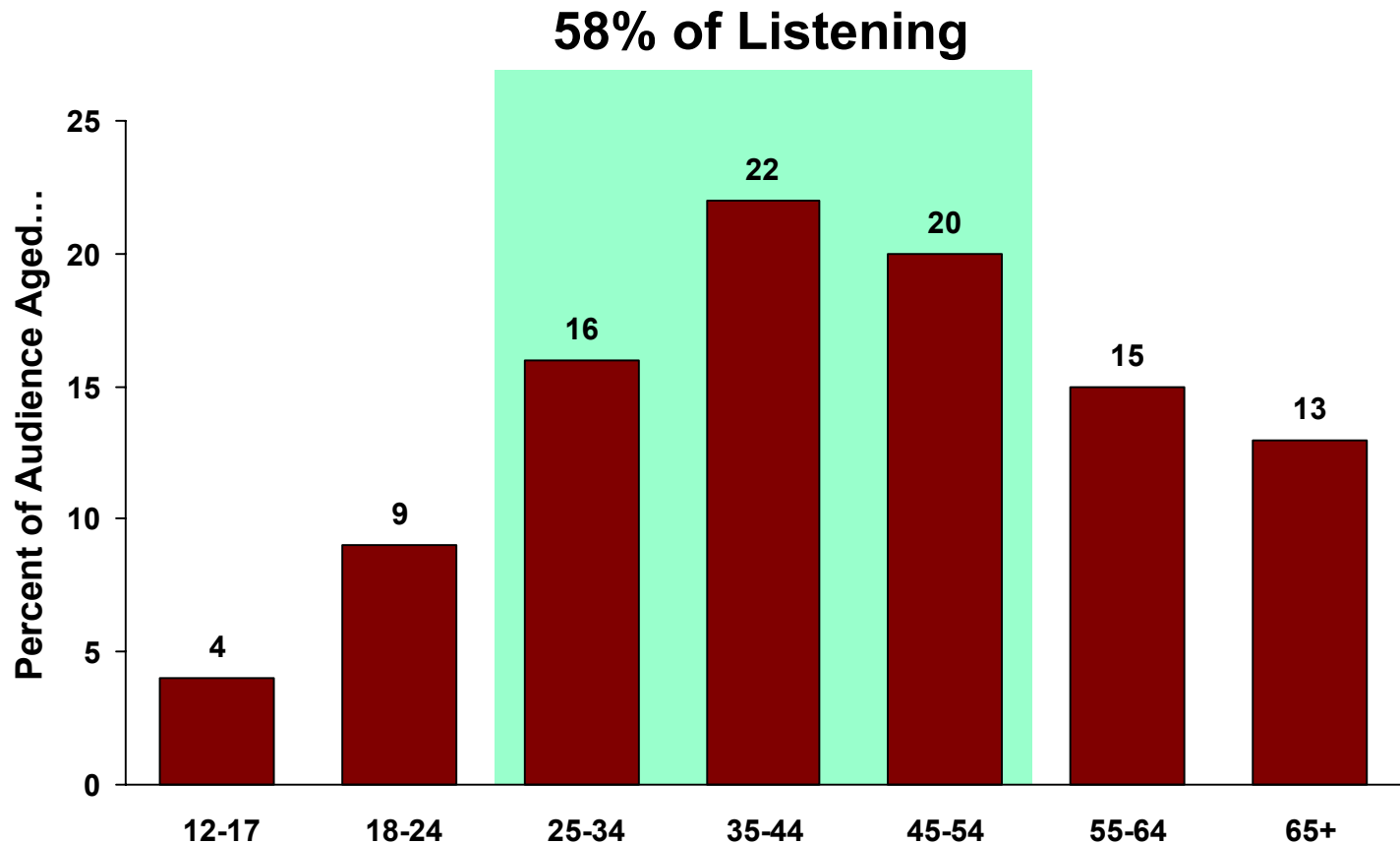


$$= \frac{\text{AQH Persons}}{\text{Market Total AQH Persons}}$$

# Nationally, Country Radio Listening Is Down Only One Share Point in 4 Years



# Primary Demo Continues to Be P25-54



# Comparing National Average to Top Performers to “Sweet 16”

- **National Average:** 212 stations in Continuously Measured markets

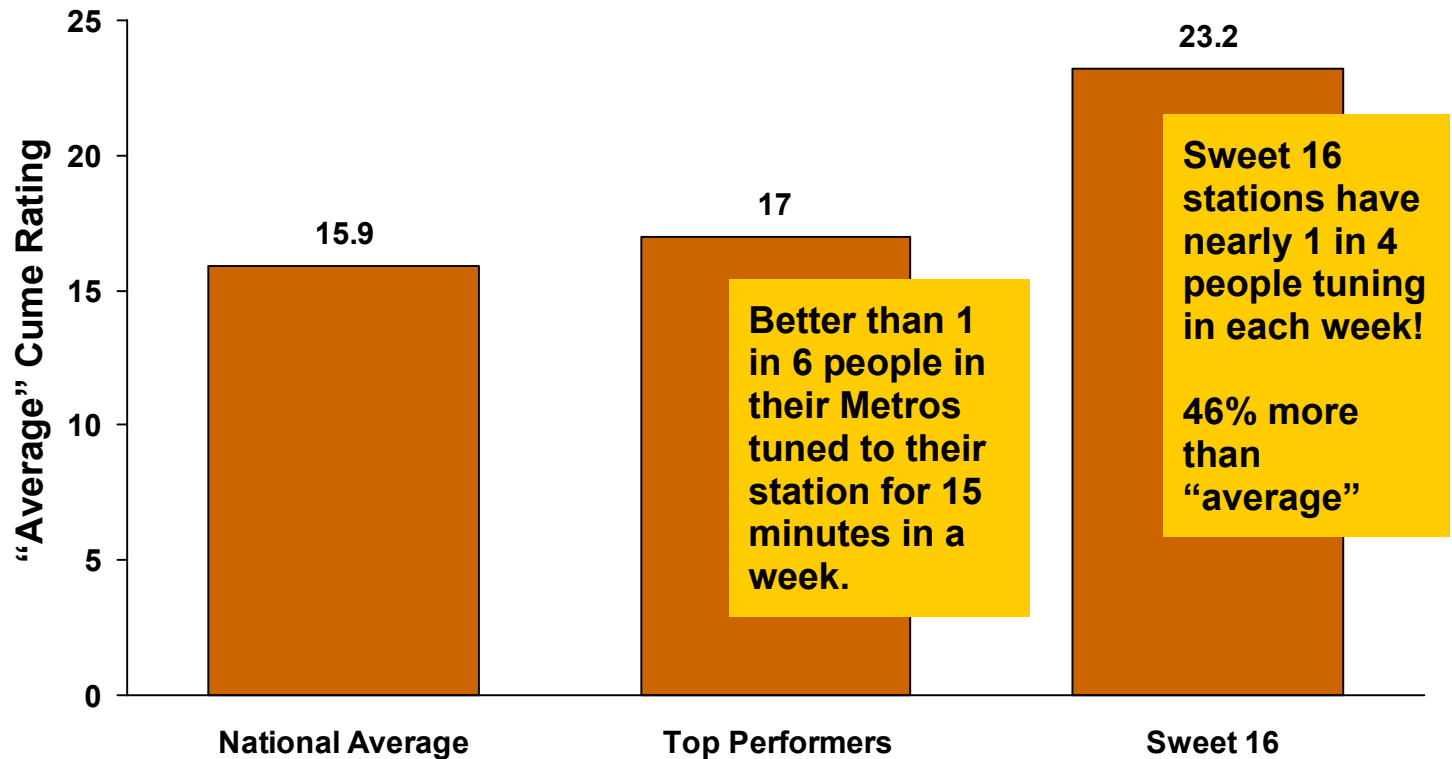
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- **National Average:** 212 stations in Continuously Measured markets
- **Top Performers:** Narrows the list down to 52 stations
- **“Sweet 16”:** These stations had all double-digit shares P12+ **and** are either in first or second place P25-54
  - » Average of 3.8 Country stations in these markets

# It Has To Start With Cume!

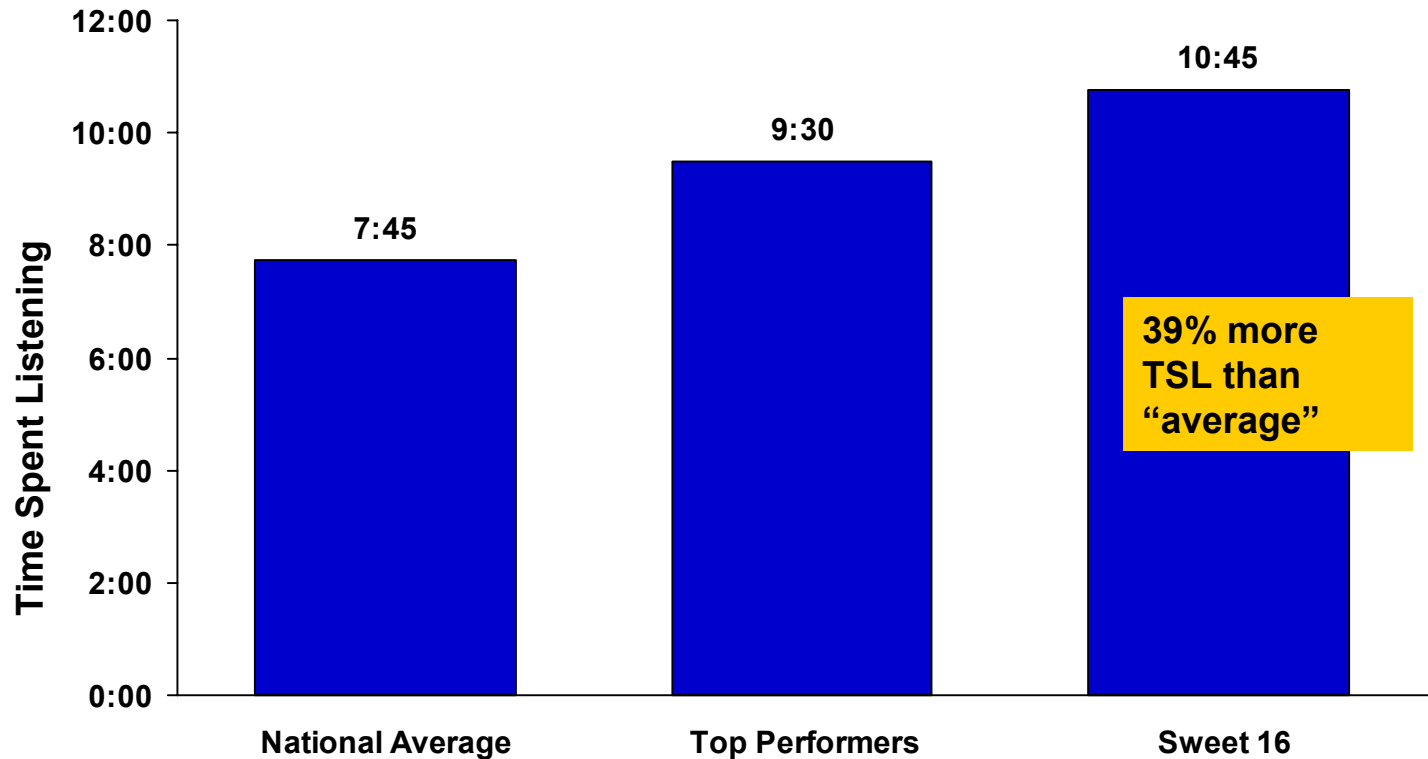


## Sources:

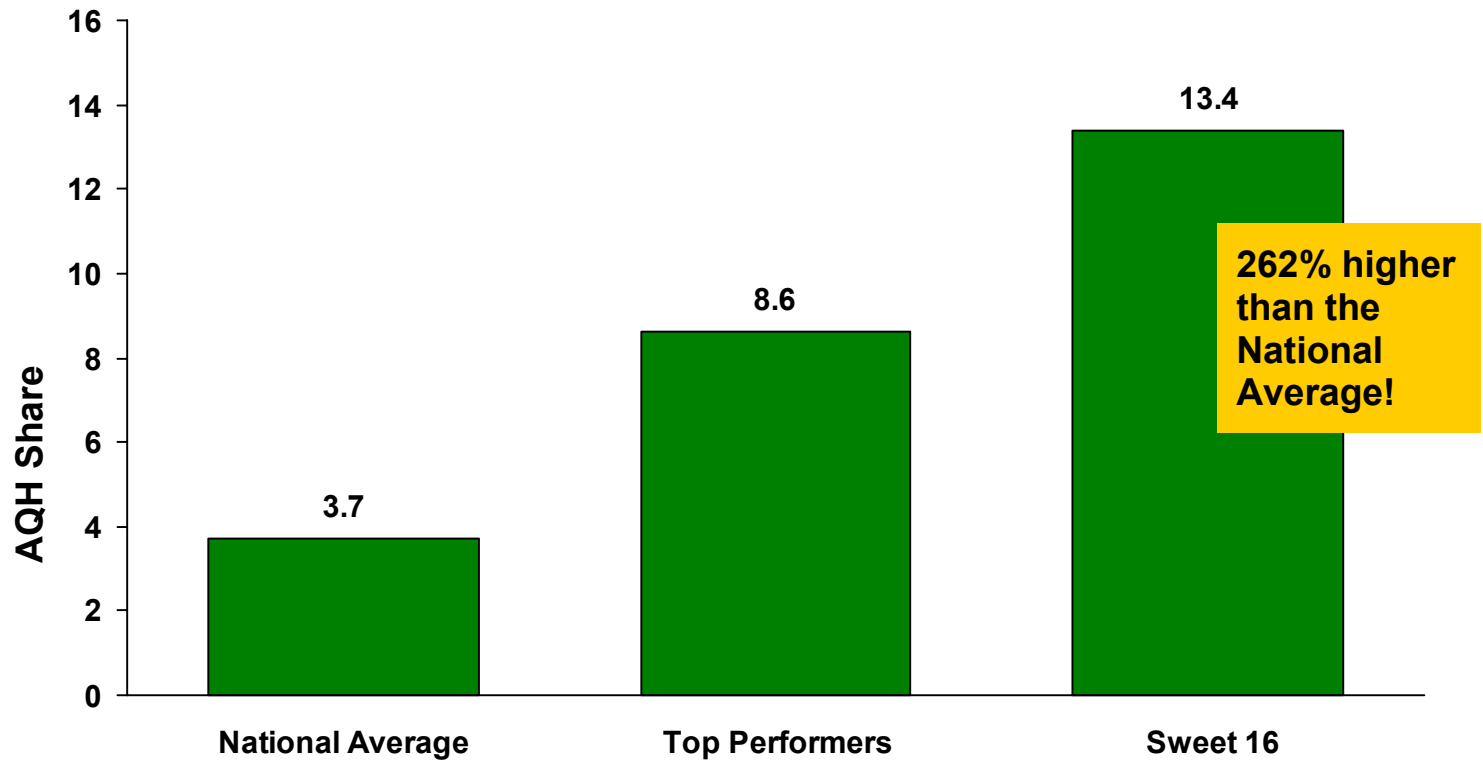
National Average: National Regional Database, Metro Cume Rating, Spring '02, P12+

Top Performers and Sweet 16: MaximiSer®, Spring '02, P12+

# ...then With That Cume, Build Time Spent Listening...

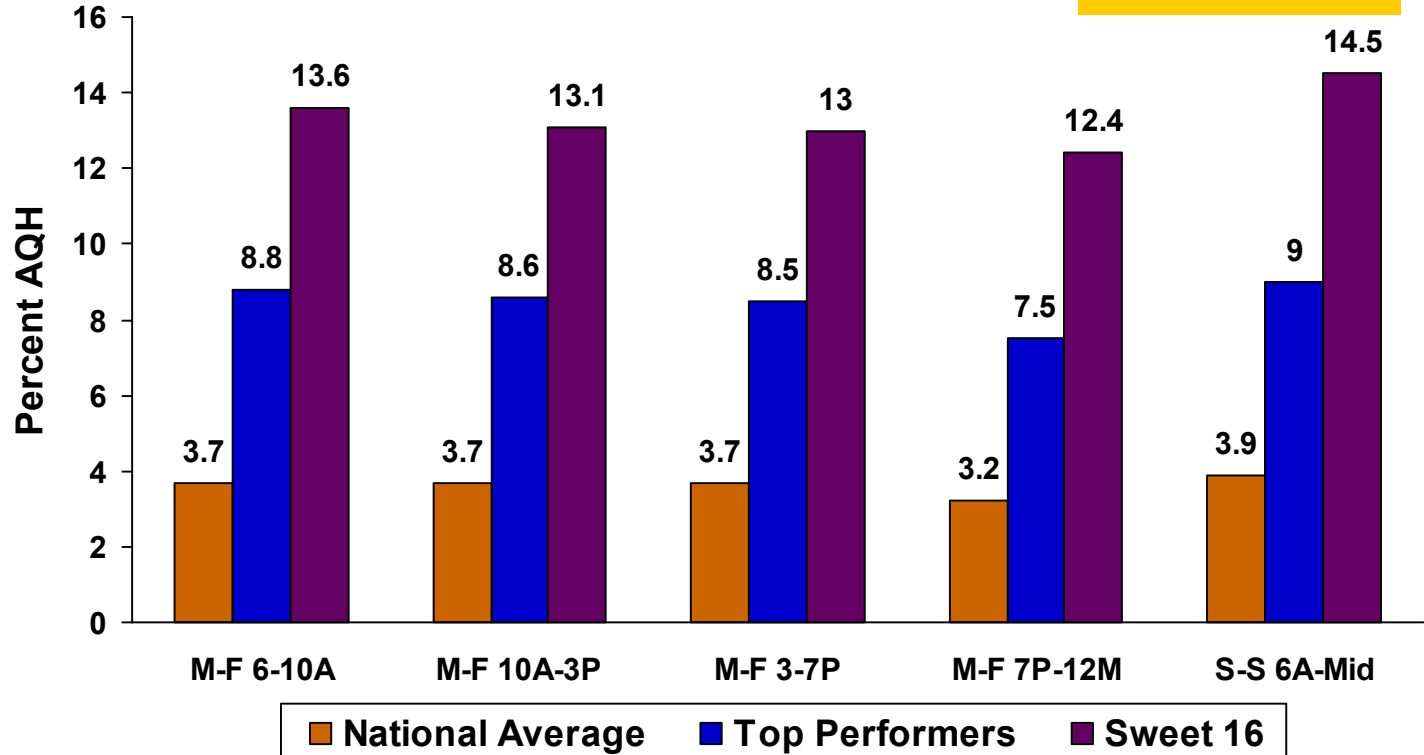


# ...to Get a Higher AQH Share in Arbitron

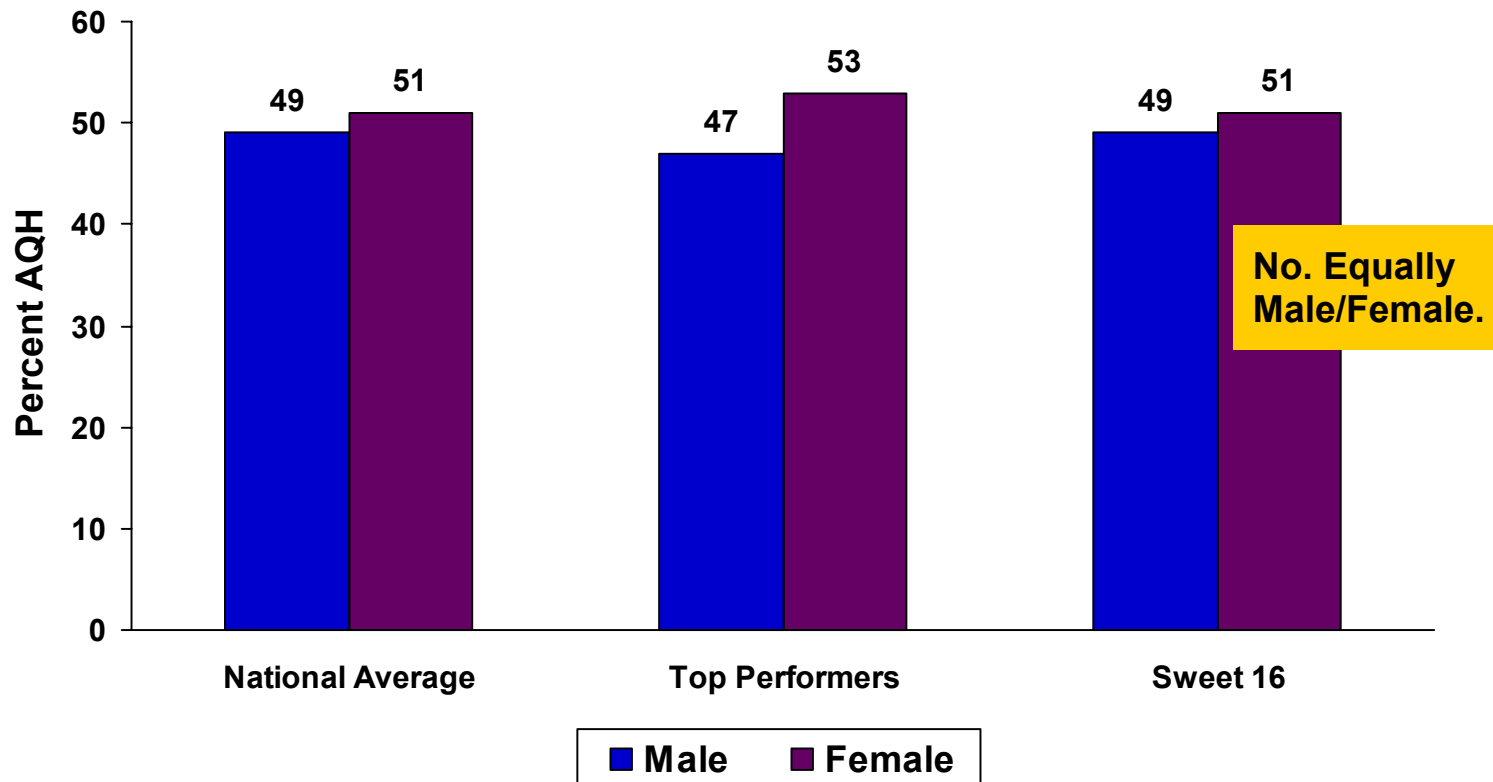


# How Does Daypart Share Differ?

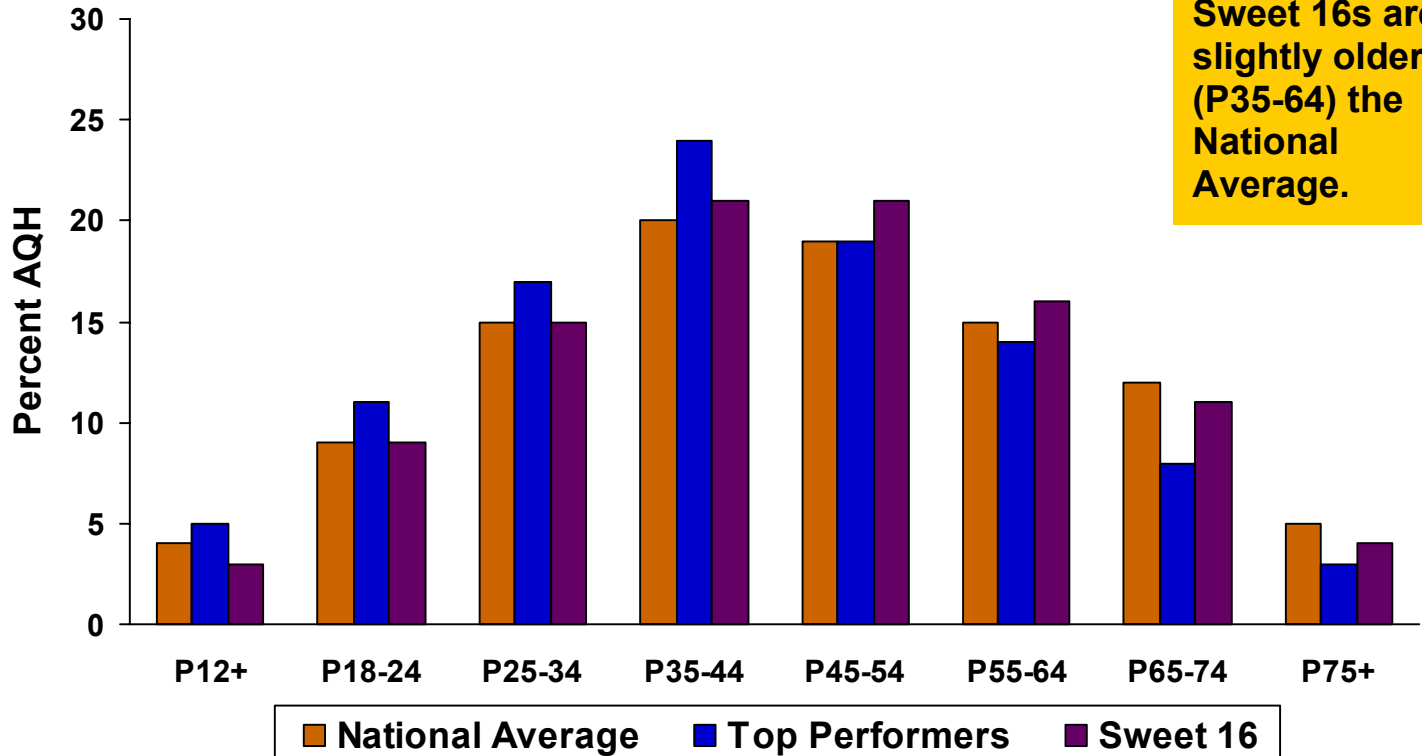
**Big Time!  
Country  
stations ARE  
winning!**



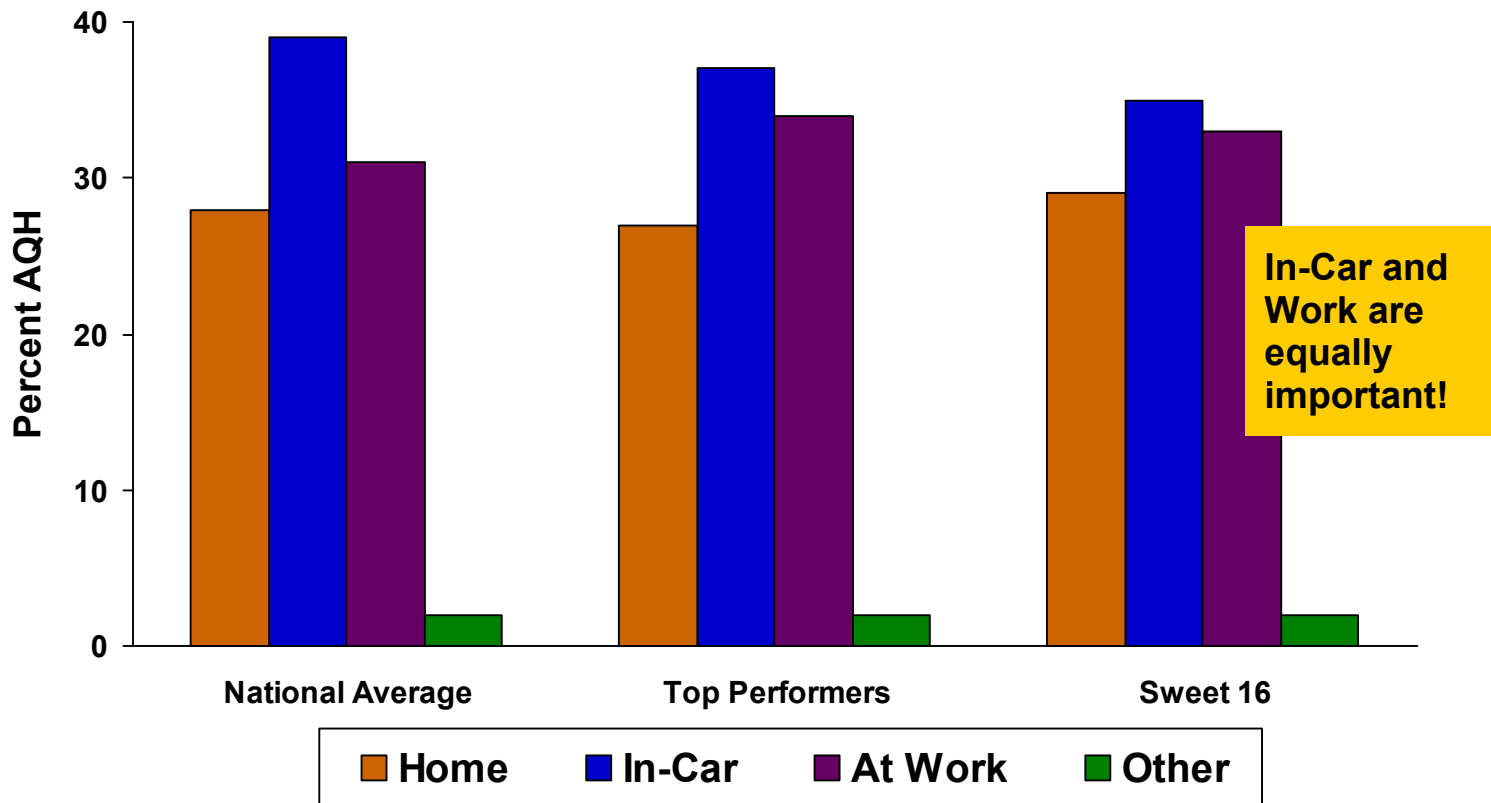
# Does Gender Composition Differ?



# Does Age Composition Differ?



# Does Location of Listening Matter?



# What is Behind the TSL?

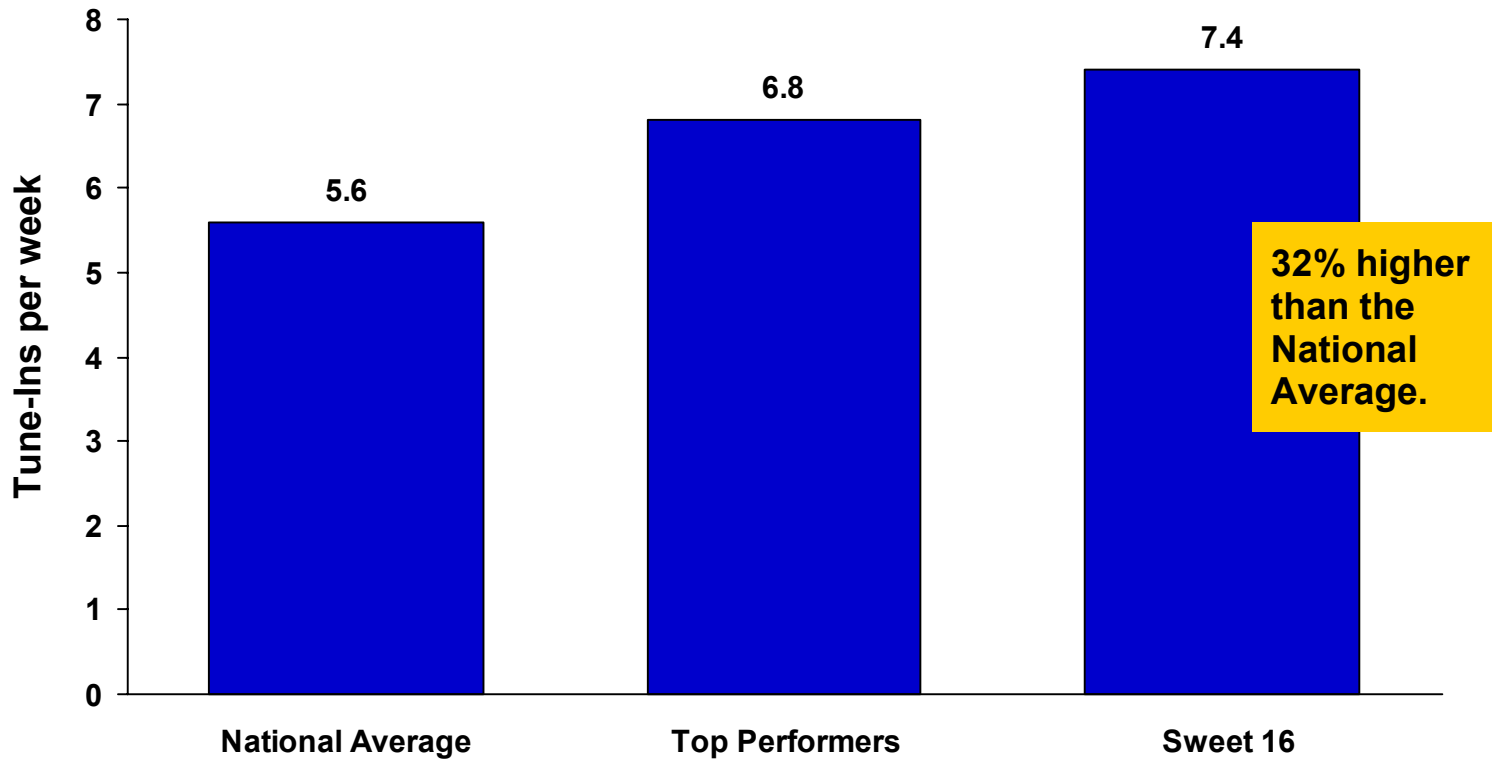
- In the first *America's Top Station* study, published in 1997, two important elements emerged as contributing to Time Spent Listening:
  - » “Occasions” of Listening: now known as “Tune-Ins”
  - » “Time Spent Per Occasion”: now known as “Time Spent Per Tune-In”
- How strong are the Top Performers and Sweet 16?

**Time Spent Listening =**

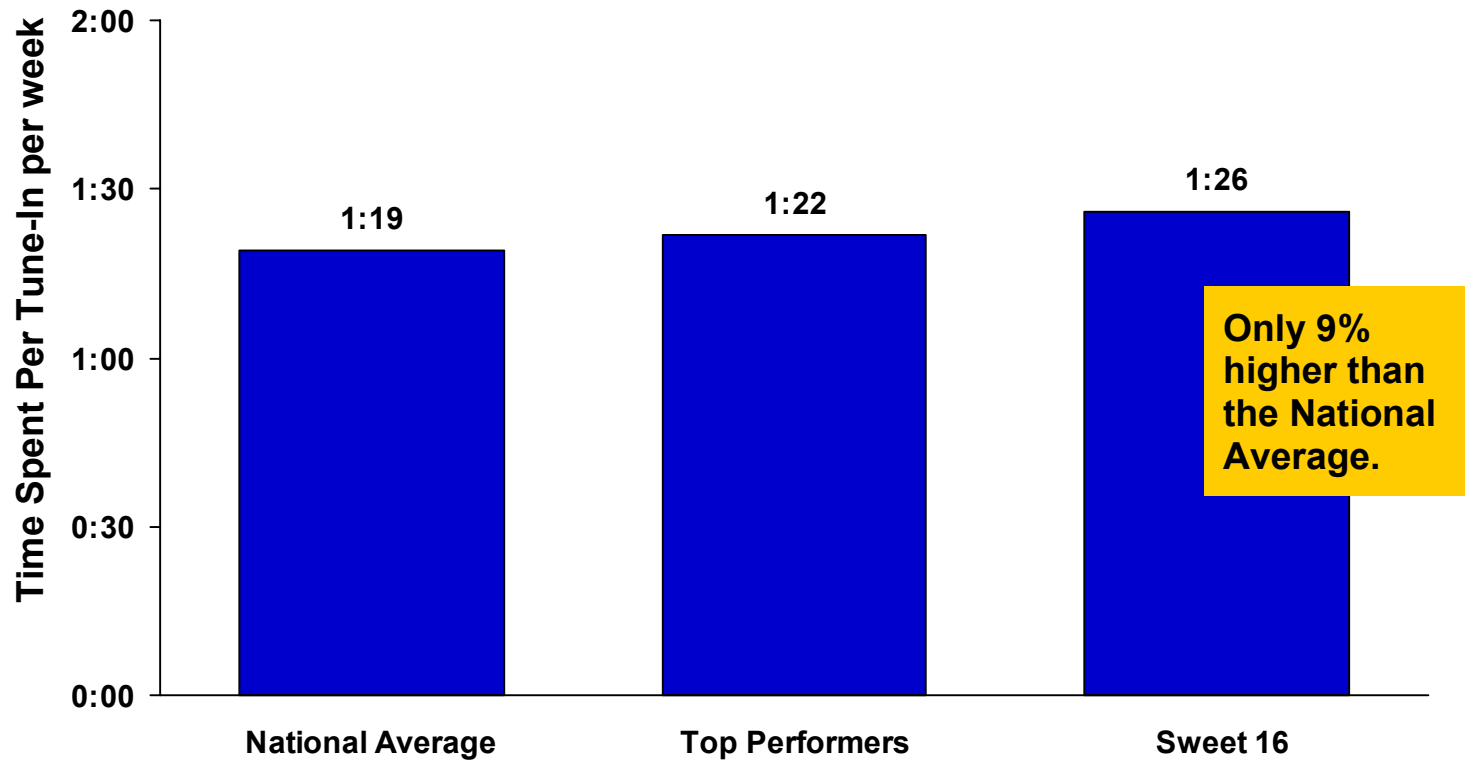
“Tune-Ins” X “Time Spent Per Tune-In”



# TSL = Tune-Ins X Time Spent Per Tune-In



# TSL = Tune-Ins X Time Spent Per Tune-In



# How Do Stations Drive TSL?

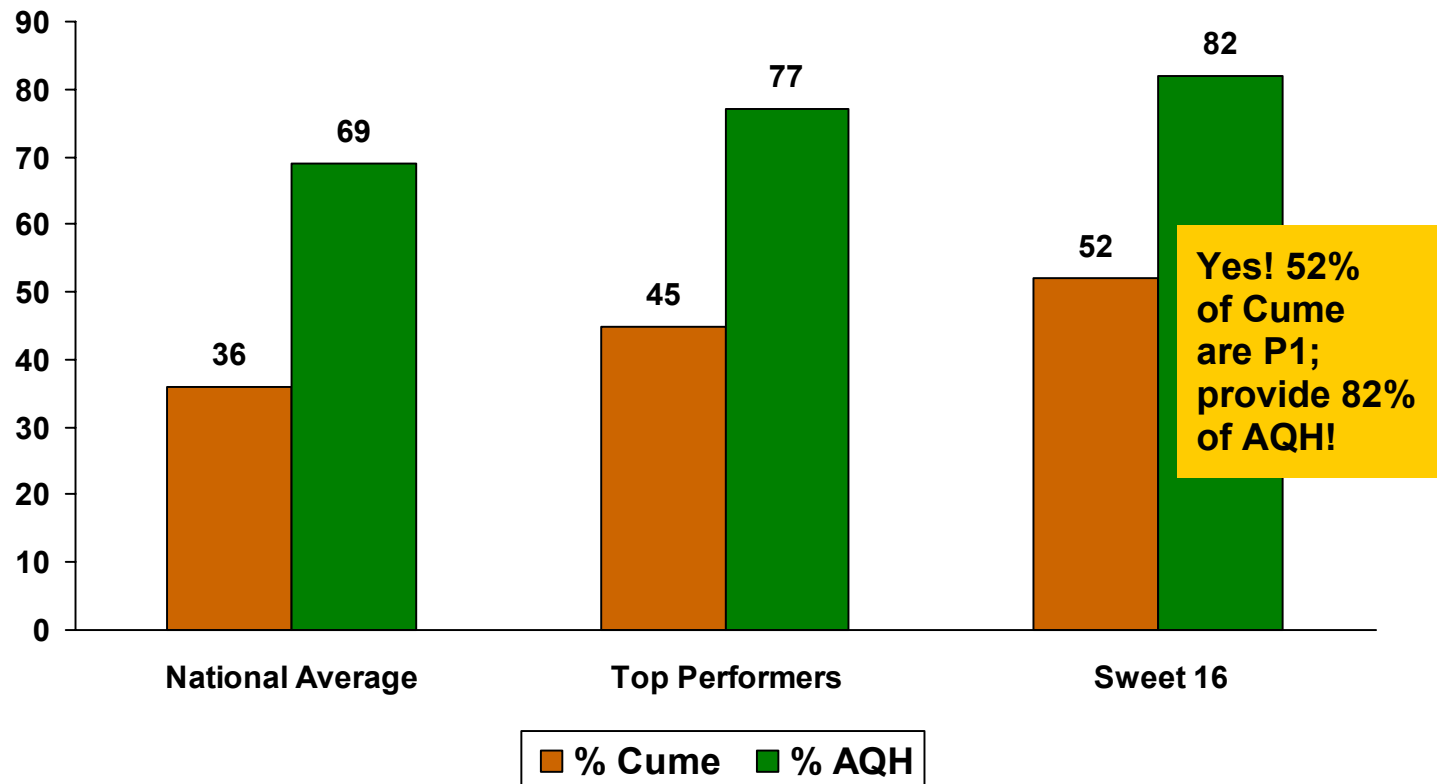
- “Tune-Ins” are the driving force behind the TSL strength of Top Performers and the “Sweet 16.”



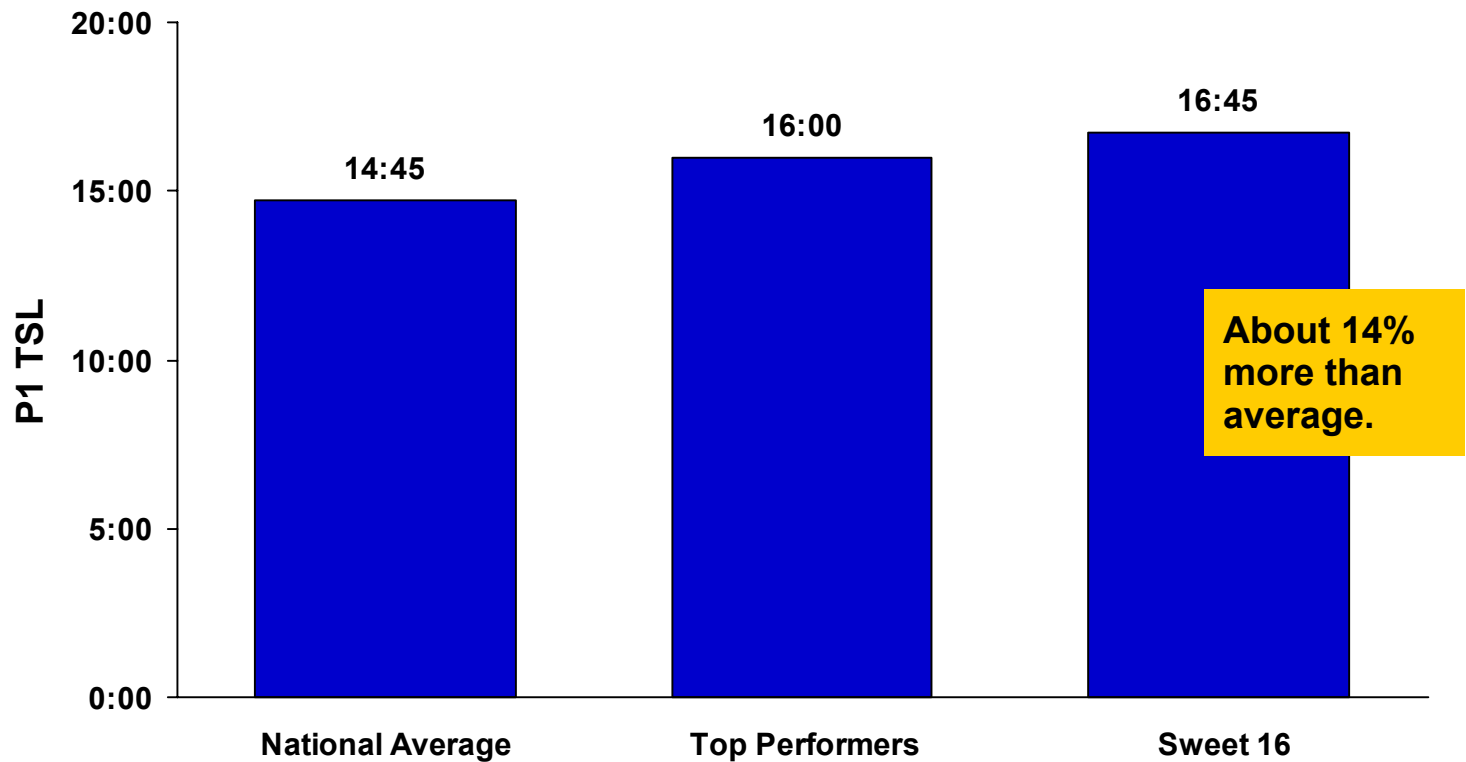
# How Do Stations Drive TSL?

- “Tune-Ins” are the driving force behind the TSL strength of Top Performers and the “Sweet 16.”
- “Tune-Ins” are driven by programming:
  - » Contests
  - » “Appointment Listening”

# Are P1 Listeners Important?

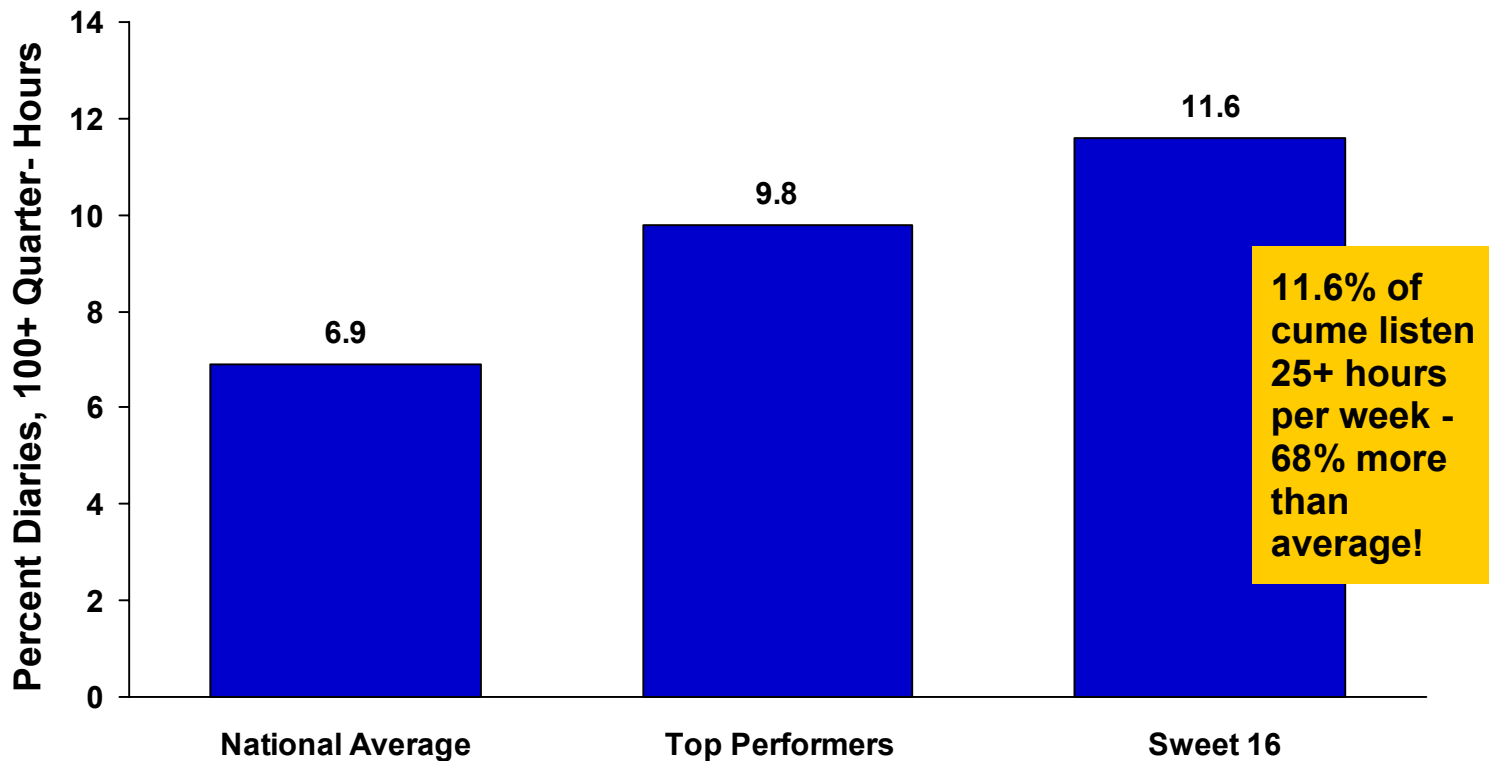


# How Much TSL Is Coming From P1s?



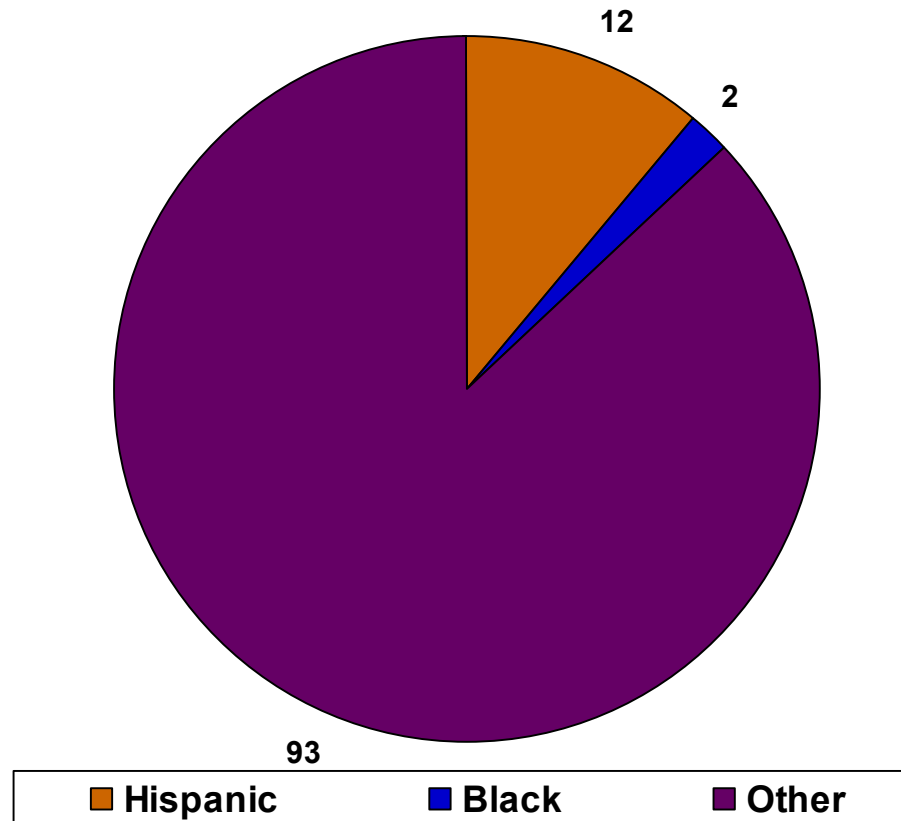
# What Else is Driving TSL?

## 100+ Quarter Hour Listeners (Ultra Core)



# How Does Ethnic Composition Affect Country Listening?

% of Ethnic Composition



# How Does Ethnic Population Change Your Expectations?

- More Hispanic/Black population without more “other” means Country Radio’s potential share is smaller

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- How has “other” population percentages changed since the 1990’s?

# So How Have Markets Changed?

Metro	Percent "Other" P12+ Population		Percent Difference
	1993	2003	
El Paso	28.8	19.0	-34.0%
Miami	48.4	38.3	-20.8%
Odessa-Midland	69.3	59.8	-13.7%
Dallas	74.0	65.2	-11.9%
Houston	62.7	55.6	-11.3%
Phoenix	82.2	72.9	-11.3%
Atlanta	72.6	64.6	-11.0%
Amarillo	82.9	75.9	-8.4%

**High Hispanic Population Markets!**

# So How Have Other Markets Changed?

Metro	Percent "Other" P12+ Population		Percent Difference
	1993	2003	
San Antonio	48.8	44.8	-8.1%
Chicago	71.5	65.7	-8.0%
Washington, DC	68.3	63.1	-7.5%
Denver	83.6	78.0	-6.7%
Nashville	84.8	81.3	-4.1%
Kansas City	85.2	81.9	-3.9%
Indianapolis	86.0	82.8	-3.7%
St. Louis	82.6	80.7	-2.3%
Detroit	77.2	75.7	-1.9%

# Summary: What Does It Take To Win?

- Have a strong Cume Rating
  - » “Sweet 16” stations have 1 in 4 people listening each week!
  - » 46% more listeners than “average stations”!

# Summary: What Does It Take To Win?

- Know how to work the TSL
  - » “Sweet 16” stations have 39% more Time Spent Listening than “average”!

# Summary: What Does It Take To Win?

- Concentrating on “Tune-Ins” is important
  - » “Sweet 16” stations have 32% more Tune-Ins than “average”!

# Summary: What Does It Take To Win?

- Know the Value of P1 and especially Ultra Core Listeners (100+ Quarter Hour)
  - » “Sweet 16” stations have 14% more TSL from P1s than “average”!
  - » 11.6% of listeners to Sweet 16 stations listen 25+ hours per week! 68% more than “average”!

# Summary: What Does It Take To Win?

- Realize that the battle will be tougher if Black/Hispanic populations are increasing in your market
  - » You must take action if the available audience to your Country Radio station is declining
  - » How?

# Thank You!

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