

Radio Today 2012

How America Listens to Radio



Radio's Enduring Relationship With U.S. Listeners

More than 90 years after its introduction as a commercial medium, radio has been heralded for its remarkable, enduring reach. To this day, about 93% of consumers aged 12 years and older listen to the radio each week. Radio is unique in its ability to reach people wherever they are: at home, at work, in the car—nearly everywhere. Regardless of one's age, the time of day, or the listening location, Americans depend on radio as a reliable media companion.

Radio Today 2012 is an in-depth snapshot of radio listening nationwide and the 23 most popular radio formats. *Radio Today* combines Scarborough consumer profiles with Arbitron audience data to develop a comprehensive profile of radio listening across America, based on the Fall 2011 Diary and October-November-December 2011 PPM® survey periods.

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Arbitron clients can access the full *Radio Today 2012* study at my.arbitron.com.

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The Executive Summary

About 93% of the U.S. population listened to radio during an average week, according to the Fall 2011 Arbitron survey (September 15, 2011-December 7, 2011). This widespread reach has changed very little over the decades; radio remains a reliable entertainment and information source for listeners regardless of their age, gender, income, education, or location in the home or outside the home. Time spent listening to radio, compared to last year's report, is relatively stable. In most listener demographic age and gender categories, and in most dayparts TSL changed at most one Quarter-Hour.

Among the formats in this year's study (listed in order of national Average Quarter-Hour share and appearance in the study):

Country + New Country, already No. 1 in our report last year, grew even more to remain in first place. The format's 0.8 year-over-year growth was larger than any other format in our study. Its geographic strength was in the Midwest and Appalachian states, and in medium and small markets.

News/Talk/Information + Talk/Personality is rich with high-income, highly educated listeners. The format's national AQH share was even with last year's report, but off from its record 14.1 share, which it earned during the presidential election runoff in Fall 2008. News/Talk/Information + Talk/Personality has the longest time spent listening of all formats in the report.

Adult Contemporary + Soft Adult Contemporary's 72 million 12+ listeners is larger than any other format in this study. The format's loss of 0.6 in AQH share might have been the result of gains by Country and Hot Adult Contemporary. The formats are strong in the midday daypart, reinforcing their reputations as "at-work" strongholds.

Pop CHR was even with last year's report, but remained substantially ahead of where it stood in the mid-2000s. Although it has the largest proportion of teens, about 40% of the format's audience is aged 35 and older.

Classic Hits stood at a 0.9 share in our 2003 report and has grown every year since then. Many of the stations in this format are rebranded Oldies stations. Listeners to this format are active web consumers.

Classic Rock is a reliable performer in all market sizes, and is the second most popular music format among Men 35-54 (next to Country). The format's listeners are avid sports fans, attending sporting events, going to sports websites, and watching sports on TV in outsized proportions.

Hot AC (Hot Adult Contemporary) experienced the second largest growth spurt in this year's study and achieved a national historical high. The format has a high proportion of women listeners, and they are active consumers of retail goods and live entertainment.

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The Executive Summary *(Continued)*

Urban AC's 3.9 persons aged 12+ national AQH share is substantially ahead of the 2.2 it had in our 2003 report. The format has the highest percentage of Black listeners in this study.

All Sports' 3.6 national AQH share is twice where it stood in our 2003 report. The format's listeners are the best educated and live in the highest income households of all the formats we studied.

Rhythmic CHR has the highest proportion of under-35 listeners of the formats in this study, and as such its listeners love technology and make vigorous use of the web. They are much more likely to visit entertainment web brands, including MySpace.

Mexican Regional is the most popular format among Hispanic listeners and one of only two Spanish-language formats profiled in this study. This format caters primarily to young men and its geographic strength lies in the Mexican border states and its neighbors.

Urban Contemporary's 2.9 national AQH share is significantly lower than its 4.6 share in our 2004 report. The format's strength lies in many Southern and industrial states, and it performed better in Diary markets. Its listeners are twice as likely to use Twitter as the average radio listener.

Contemporary Christian has become stronger in the PPM era, thanks to recent growth in the major markets. Listeners to this format are looking to buy Blu-ray players and digital cameras this year; they also enjoy family-oriented cable TV networks such as Disney, Nick Jr., and ABC Family.

Adult Hits + '80s Hits achieved a 2.2 national persons aged 12+ AQH share for the third consecutive year. Known on many stations as "JACK-FM," stations in these formats are known for their music variety.

Active Rock's 2.1 AQH share is off two-tenths from the 2.3 share that it earned in our 2011 report. The format had the second-highest proportion of male listeners, next to All Sports. It also had a high proportion of out-of-home listening.

About *Radio Today* 2012

Arbitron *Radio Today* contains radio listening and consumer behavior statistics for radio listeners in the United States. Data for the charts and graphs in this edition come from these sources:

- Format definitions are supplied to Arbitron by government-licensed radio stations, their Internet streams, and HD radio services, regardless of their statuses as Arbitron clients.
- Format-specific and some national data come from the Arbitron TASPCAN™ Web National Regional Database, Fall 2011, featuring quantitative radio audience information from the total United States
- Some national listening data come from RADAR 116, June 2012.
- Scarborough data in this report are from the company's National USA+ Study, Release 2, 2011.

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National Radio Format Shares and Station Counts

Fall 2011

Format	12 + Share	Total Stations	Primary			HD Radio					Streaming				
			FM	AM	Total	HF	HA	F2	F3	F4	IF	IA	G2	G3	G4
Country + New Country	14.1	2861	1433	314	1747	139	0	42	3	1	811	102	14	2	0
News/Talk/Info + Talk/Personality	12.1	4012	621	1371	1992	238	99	107	70	6	513	852	76	53	6
Adult Contemporary + SAC	8.8	1430	713	112	825	109	0	22	1	0	418	44	11	0	0
Pop Contemporary Hit Radio	7.6	997	461	4	465	113	0	34	2	0	362	3	16	2	0
Classic Hits	5.1	945	457	96	553	59	2	18	1	0	263	42	6	1	0
Classic Rock	5.0	958	502	16	518	76	0	43	1	0	301	5	14	0	0
Hot Adult Contemporary	4.4	827	466	9	475	73	0	7	0	0	269	1	2	0	0
Urban Adult Contemporary	3.9	338	132	36	168	44	2	11	1	0	94	16	2	0	0
All Sports	3.6	1281	133	575	708	29	42	32	30	2	94	315	15	13	1
Rhythmic Contemporary Hit Radio	3.4	380	147	2	149	47	0	40	0	0	123	1	20	0	0
Mexican Regional	3.0	554	204	148	352	25	3	7	0	0	102	60	5	0	0
Urban Contemporary	2.9	274	122	18	140	27	0	13	0	0	77	10	7	0	0
Contemporary Christian	2.7	1660	861	36	897	19	0	25	6	0	669	19	21	4	0
Adult Hits + '80s Hits	2.2	436	205	16	221	40	1	23	3	0	134	4	9	1	0
Active Rock	2.1	373	177	1	178	33	0	21	0	0	133	1	7	0	0
AOR + Mainstream Rock	1.9	357	182	3	185	25	0	15	2	0	125	2	2	1	0
Alternative	1.8	623	272	5	277	32	1	61	9	0	199	5	30	9	0
Oldies	1.6	871	279	300	579	12	3	33	4	0	115	109	14	2	0
Classical (see <i>Public Radio Today</i>)	1.5	819	258	4	262	127	0	96	11	0	228	3	82	10	0
Spanish Contemporary	1.5	204	69	40	109	18	3	7	1	0	42	20	3	1	0
All News	1.5	96	13	24	37	7	7	2	6	0	12	21	1	3	0
Religious	1.2	1692	794	388	1182	8	15	8	3	1	279	189	5	2	0
Adult Album Alternative	1.1	508	181	4	185	47	0	55	16	0	153	3	37	12	0
Variety	0.9	1543	733	108	841	109	4	24	12	0	479	52	18	4	0
Classic Country	0.9	483	106	207	313	7	4	29	2	0	39	79	9	1	0
Spanish Adult Hits	0.9	115	39	11	50	16	2	6	0	0	32	6	3	0	0
Gospel	0.8	469	84	234	318	3	8	9	0	0	30	95	6	0	0
Contemporary Inspirational	0.7	225	113	18	131	8	2	5	1	1	65	7	4	1	0
Adult Standards/MOR	0.5	299	37	178	215	0	5	4	1	0	15	56	3	0	0

Legend

FM	FM Station
AM	AM Station
HF	Digital (HD Radio) FM Station
HA	Digital (HD Radio) AM Station
F2	HD Radio Multicast Station
F3	HD Radio Multicast Station
F4	HD Radio Multicast Station
IF	Internet Stream of FM station
IA	Internet Stream of AM station
G2	Internet Stream of HD Radio Multicast F2
G3	Internet Stream of HD Radio Multicast F3
G4	Internet Stream of HD Radio Multicast F4

continued ►

Source: Arbitron Radio Station Information Database, December 2011. These station counts include rated, unrated, commercial, and noncommercial stations. The AM & FM columns only include FCC-licensed stations and do not include translators.

National Radio Format Shares and Station Counts

Fall 2011 (continued)

Format	12 + Share	Total Stations	Primary			HD Radio					Streaming				
			FM	AM	Total	HF	HA	F2	F3	F4	IF	IA	G2	G3	G4
Spanish Tropical	0.4	82	21	27	48	3	2	1	0	0	14	13	1	0	0
Rhythmic AC	0.4	60	20	1	21	10	0	7	0	0	18	0	4	0	0
Educational	0.3	210	98	5	103	18	2	7	1	0	67	4	7	1	0
Spanish News/Talk	0.3	114	4	55	59	0	4	6	3	0	3	34	4	1	0
Modern Adult Contemporary	0.3	51	23	0	23	8	0	4	0	0	15	0	1	0	0
Rhythmic Oldies	0.3	40	13	7	20	2	0	6	0	0	9	2	1	0	0
Southern Gospel	0.2	265	94	93	187	0	0	1	0	0	43	33	1	0	0
Jazz	0.2	190	68	3	71	22	0	25	6	0	50	1	10	5	0
Spanish Variety	0.2	181	46	75	121	9	0	2	2	0	19	27	1	0	0
Spanish Religious	0.2	181	50	68	118	2	0	2	0	0	28	30	1	0	0
Spanish Hot Adult Contemporary	0.2	32	11	1	12	5	0	3	1	0	10	0	0	1	0
Smooth Adult Contemporary	0.2	18	5	0	5	3	0	4	0	0	5	0	1	0	0
World Ethnic	0.1	167	20	82	102	1	2	4	0	0	11	46	1	0	0
New AC (NAC)/Smooth Jazz	0.1	95	21	6	27	1	0	33	1	0	16	4	13	0	0
Urban Oldies	0.1	49	10	12	22	0	1	11	2	0	3	5	4	1	0
Easy Listening	0.1	49	23	8	31	2	0	0	0	0	14	2	0	0	0
Tejano	0.1	40	14	10	24	0	1	4	0	0	6	4	1	0	0
Spanish Oldies	0.1	32	4	20	24	0	1	0	0	0	1	6	0	0	0
Other	0.0	166	57	25	82	1	1	25	17	0	24	6	7	3	0
Christian Adult Contemporary	0.0	108	56	0	56	5	0	1	0	0	46	0	0	0	0
Family Hits	0.0	72	3	25	28	1	17	1	0	0	3	21	1	0	0
Spanish Contemporary Christian	0.0	64	14	19	33	0	1	4	3	0	9	10	1	3	0
Nostalgia	0.0	55	10	27	37	1	1	1	1	0	7	5	1	1	0
Spanish Sports	0.0	41	4	21	25	0	2	2	1	0	0	10	1	0	0
Children's Radio	0.0	31	0	12	12	0	8	0	1	0	0	9	0	1	0
Blues	0.0	26	2	1	3	0	0	18	0	0	2	1	2	0	0
Comedy	0.0	22	2	6	8	0	3	3	2	0	0	4	2	0	0
Latino Urban	0.0	6	2	0	2	0	0	2	0	0	2	0	0	0	0

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