

# FORMATS IN FLUX

**EXCLUSIVE:**  
New Study Reveals  
How Individual  
Formats Are  
Affected In Initial  
Transition From  
Diary To PPM

By Paul Heine

*When it comes to* how individual radio formats perform under Arbitron's Portable People Meter radio ratings service, wider is better. Stations with broad appeal and a strong male listening audience do better in the initial transition from the diary to electronic audience measurement. Those outlets that rely on a small core audience that listens for long periods of time tend to get lower ratings under the PPM service compared with the diary.

Those conclusions are based on a new format-share study conducted by Annapolis, Md.-based research firm Research Director for Radio & Records, which is owned by Nielsen. The study compared the diary with PPM ratings across principal formats in eight major PPM markets: New York, Los Angeles, Chicago, San Francisco, Washington, Dallas, Atlanta and Detroit. (The analysis did not include Houston and Philadelphia, which made the transition in early 2007.)

By the end of the year, Arbitron will be measuring radio audiences using the PPM in 14 mar-

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kets. Plans are to roll out the service to the top 50 markets by the end of 2010.

The winning formats? Such baby boomer destinations as oldies, classic rock and classic hits, and mainstream/general-market formats, including news, CHR/top 40, AC and hot AC, rock and country. In general, these formats saw significant increases in audience share.

The losers? Niche formats that rely on small core loyal audiences that listen for longer periods of time, such as Spanish-language formats, urban and urban AC, talk and smooth jazz. Audience shares for these formats tumbled in some cases by as much as 25%.

Registering the largest upswing in the top 10 was news, which skyrocketed 21.2% from a 5.6 overall share in the diary to a 6.8 with the PPM. However, the format likely would have surged regardless of methodology, due to exceptionally

high interest in a historic presidential election and an unprecedented global financial crisis.

Classic hits and oldies also received a huge boost, up 17.7% from 8.9 to 10.5. Other gainers in the top 10: country (up 13.7%), AC (up 8.6%) and rock and CHR (both up by 5.3%).

Meanwhile, audience share for minority formats in the top 10 plummeted: Urban AC lost 17.2% of its market share, urban took a 14.4% hit, and Spanish-language, while still ranked No. 1 among all formats in overall share, lost 10.3% of its lead.

Results varied significantly from market to market. For example, Spanish-language share ratings were up in Dallas and Atlanta, but down in the five other markets in the study where the format exists. Urban grew by nearly two share points in Chicago, was basically flat in New York and San Francisco, but fell sharply everywhere else. And while smooth jazz plunged by an aver-

## HOW THE STUDY WAS CONDUCTED

To assess how individual formats perform in Arbitron's PPM service compared with the diary, Research Director examined ratings from the eight major markets that have recent diary ratings as well as October PPM data. The most recent four-book averages of AQH share, persons 12+, Mon.-Sun., 6 a.m.-midnight from the diary service were compared with the same demo/daypart from the October PPM report. To achieve an apples-to-apples comparison, diary-based format shares from each market were recalculated to exclude unencoded stations. This compensated for the difference in the definition of "share" between the two methodologies: With the diary, it refers to the percentage of all listening in an average quarter-hour; with the PPM, it includes only encoded stations and not unencoded out-of-market signals. Also excluded were stations that did not achieve a minimal ratings threshold and stations that were not programming the same format during the four diary surveys and the October PPM survey. The only exception was triple A WRXP/New York, whose spring and summer 2008 diary ratings were used. Active rock, rock, alternative and triple A were grouped together as rock. Format shares from each of the eight markets were added up and divided by the number of markets where the format exists, to net an average format share across the eight markets.—PH

## PPM's Top Format Performers (Ranked By Format Share)

RANK	FORMAT	DIARY*	PPM**	% GAIN/LOSS
1	Spanish	14.8	13.3	-10.3%
2	Talk	10.9	10.7	-2.6%
3	Classic/oldies	8.9	10.5	17.7%
4	Urban AC	11.7	9.7	-17.2%
5	AC	8.1	8.8	8.6%
6	Urban	8.0	6.9	-14.4%
7	News	5.6	6.8	21.2%
8	Rock	6.2	6.5	5.3%
9	CHR	5.9	6.2	5.3%
10	Country	5.4	6.1	13.7%
11	Classical	6.7	6.0	-10.7%
12 (tie)	Public	5.4	5.0	-7.0%
12 (tie)	Hot AC	4.0	5.0	25.2%
13	Sports	3.3	4.2	27%
14	Smooth jazz	4.3	3.3	-24.6%
15	Rhythmic	3.2	3.2	-1.2%
16	Gospel	2.8	3.0	7.2%
17	Christian	0.9	0.8	-1.9%

\* Four-book average (fall 2007-summer 2008) \*\* October 2008 report (Sept. 18-Oct. 15)

SOURCE: Research Director analysis of Arbitron data from eight markets.

