

# The '80s

An Early Look at the Numbers Driving  
Radio's Newest Format



## Do You Remember the '80s?



It was the decade of spike hair and leg warmers. Guys dressed like Don Johnson and women dressed in men's attire. A Rubik's Cube could be found in every kid's household along with an Atari game system. Wendy's asked, "Where's the beef?" and McDonald's rolled out the McDLT. While much of the above is gone forever, the music of this very special decade has returned.



Photos from themall1041.com

## Top '80s Artists for the Week of March 8, 2001\*

- U2
- Police
- Cars
- John C. Mellencamp
- Journey
- Madonna
- Prince
- R.E.M.
- Pat Benatar
- Duran Duran

\* Mediabase 24/7 '80s Hits Artist Chart



## Top '80s Songs for the Week of March 8, 2001\*

- "Don't You (Forget About Me)" – Simple Minds
- "Melt with You" – Modern English
- "Don't You Want Me" – Human League
- "Sweet Dreams" – Eurythmics
- "Summer of '69" – Bryan Adams
- "Just What I Needed" – Cars
- "Shout" – Tears for Fears
- "Heart of Glass" – Blondie
- "The One I Love" – R.E.M.
- "What I Like About You" – Romantics

\* Mediabase 24/7 '80s Hits Chart



## The '80s Format

- Radio's newest format is popping up everywhere. According to the Coleman Research "'80s Insight Study," 13 new '80s stations debuted during the Fall Arbitron survey alone, and there are now 20 '80s stations in the top 53 markets in the U.S.
- While very few of these stations have been in format long enough to make a determination about long-term ratings success, there do appear to be some common elements in the Arbitron estimates that these stations share.
- The following study looks at seven '80s stations that were in format during the Fall 2000 book\* to get a better idea of what the critical factors are that will drive the format to success.

\* WMLL St. Louis switched to '80s on September 24, four days into the Fall survey.



## Findings

- The '80s format has razor-sharp demo appeal. On average, 50 percent of the listening to an '80s station is generated by those in a 10-year age range.
- A split right down the middle, the '80s format has equal appeal to male and female listeners alike.
- The '80s really shine when it comes to delivering upscale listeners. '80s listeners work full-time, have a college education and HH incomes over \$75,000.
- At-work listening is key for '80s stations. Over 40 percent of the listening to an '80s station is being generated from the workplace. Furthermore, the 25-44 demographic that makes up the core of '80s listeners are most likely at-work listeners.

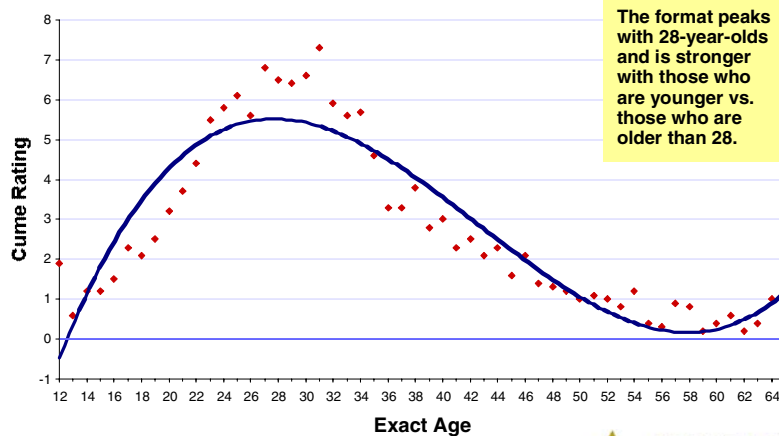


## Findings (continued)

- Middays (10AM-3PM) and PM Drive (3PM-7PM) are the strongest dayparts for '80s stations, with AM Drive (6AM-10AM) being one of the weakest.
- Based on the Fall survey, 1st Preference listening (core listening) to '80s stations is lower than the national average (average quarter-hour and cume). Additionally, the "Ultra Core" (those listening for 100 quarter-hours or more) is also lower than the national average.
- '80s stations will need to grow the time spent listening by growing the number of occasions listeners tune in per week.
- It would appear that the '80s format will compete most with Modern AC, Alternative, Contemporary Hit Radio (CHR) and Album-Oriented Rock (AOR).



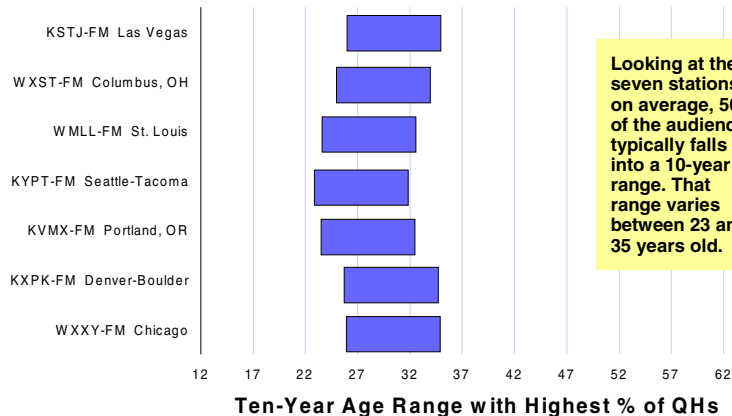
## A 28-Year-Old Appears to Be the Bull's Eye for '80s Stations



Red dots represent the cume rating to '80s stations for that exact age; blue line is a polynomial regression of these data points.



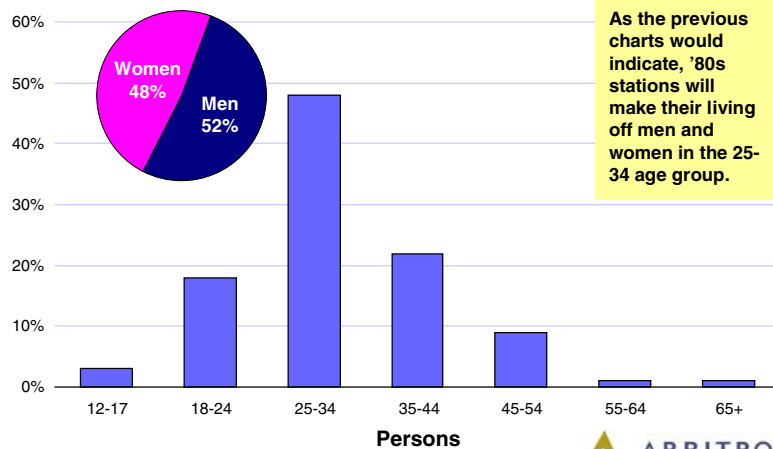
## The '80s Format Delivers a Very Tight Core



Looking at the seven stations, on average, 50% of the audience typically falls into a 10-year range. That range varies between 23 and 35 years old.



## Almost Half of the '80s Audience Is 25-34

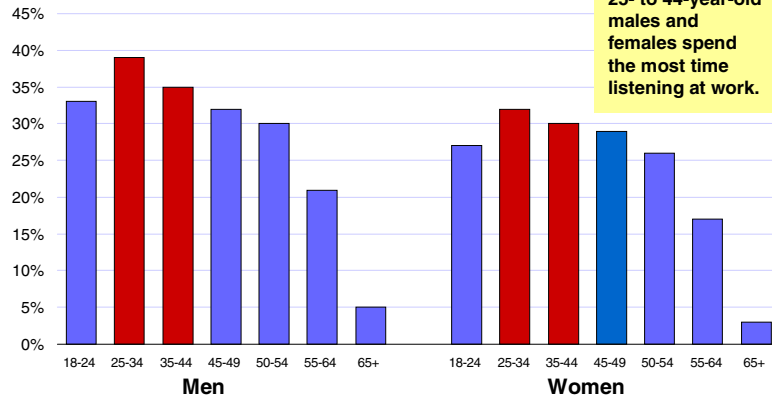


As the previous charts would indicate, '80s stations will make their living off men and women in the 25-34 age group.



## Historically, At-Work Listening Rules Among 25- to 44-Year-Olds

Percent Listening at Work

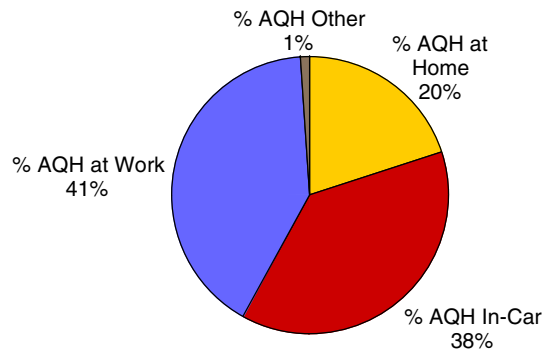


25- to 44-year-old males and females spend the most time listening at work.

Analysis of Radio Listening by Age, Sex & Location, Fall 1999, Total U.S., M-Su 6AM-Mid, Persons 12+



## Not Surprisingly, '80s Is Huge at Work

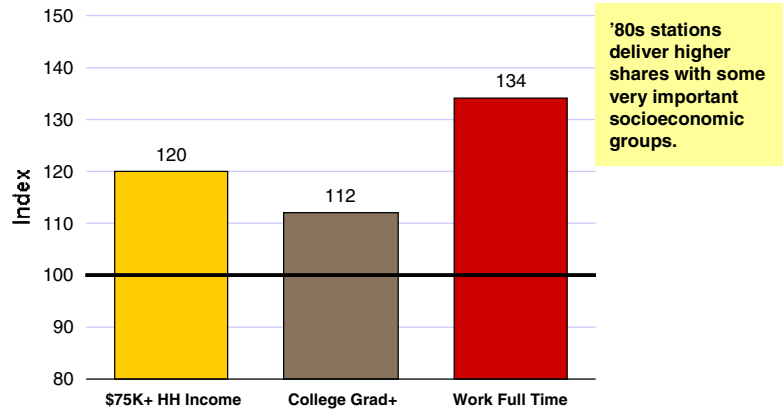


With 41% of the '80s audience coming from at-work listening, '80s stations rank as the number one\* (alongside Hot AC stations) at-work listening format.

\* AQH Audience Composition by Listening Location, Fall 1999, Total U.S., M-Su 6AM-Mid, Persons 12+



## '80s Stations Are Upscale!



*An index of 120 would indicate that the 12+ share with that particular demographic group (those in a HH with an income of over \$75K) is 20% higher than the overall 12+ share.*

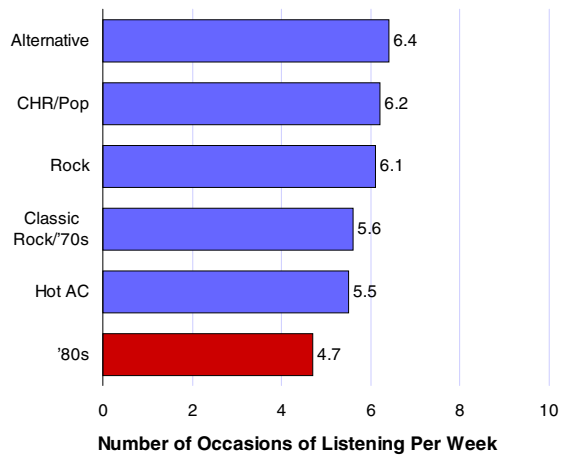


## The Challenge Ahead

As with many new formats, the challenge for '80s stations will be to convert trial into habituation.



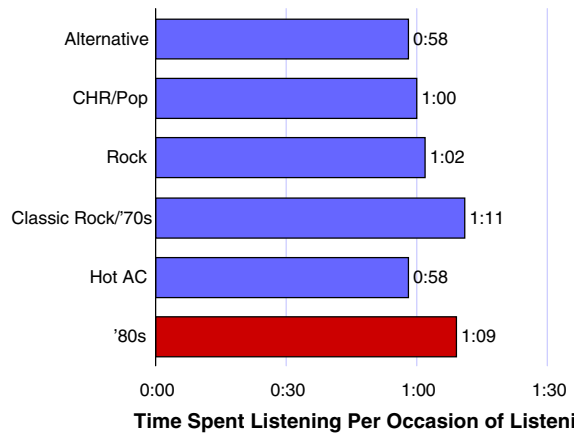
## '80s Listeners Tune In Less Often



On average, listeners tune in to an '80s station 4.7 times per week. This is less than some of the other formats that attract a similar age group.



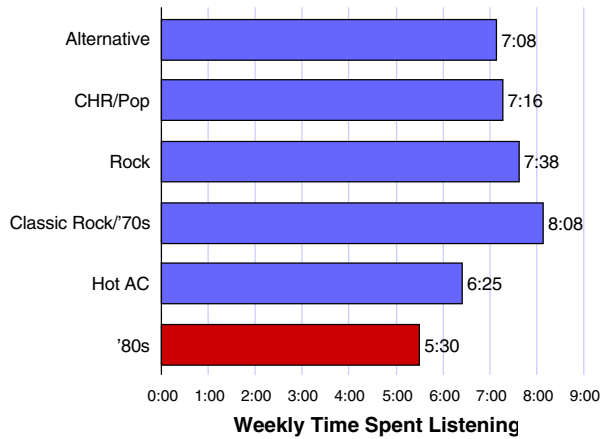
## They Might Listen Less Often, But They Listen Longer per Occasion



On average, listeners tune in to an '80s station for 1 hour 9 minutes per occasion. This is a bit longer than what competing formats are getting.



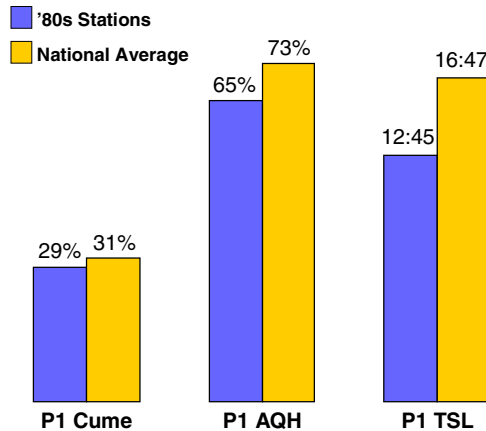
## Total Time Spent Listening



Although the time spent listening per occasion is strong, '80s stations will need to convince their listeners to come back more frequently to grow the overall TSL.



## 1st Preference Listening to '80s Stations Trails the National Average

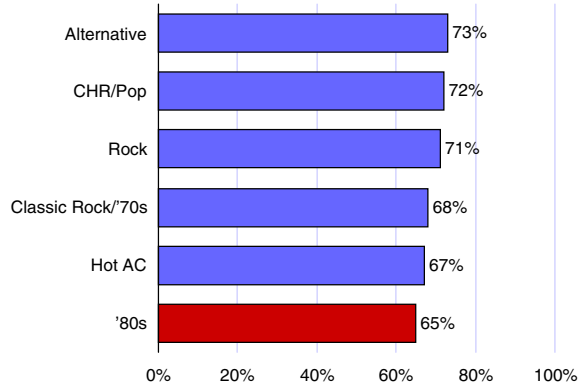


P1 listening is crucial to the ratings success of most stations. A typical radio station will have 36% of the cume as P1. This will account for 72% of the AQH. First-preference listening to '80s stations appears to be on the lighter side (quite possibly because of the newness of the format). '80s stations will need to grow P1 listening or expand the cume to compensate.

National P1 numbers from the Arbitron "America's Top Stations" Study



## P1 Listeners Account for Less Listening to '80s Stations Than Competing Formats

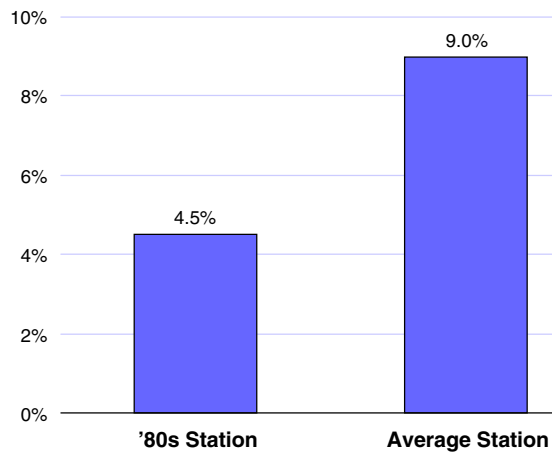


Compared to formats that attract a similar-age listener, '80s stations get a lower percentage of AQH listening from the all-important P1 listener.

Competing-format P1 numbers from the Arbitron "America's Top Stations" Study



## The '80s Ultra Core

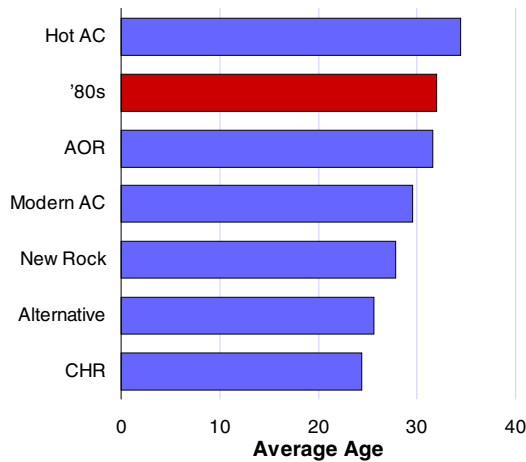


The all-important Ultra Core\* is critical to ratings success. 9% of a typical station's cume will be Ultra Core listeners. This 9% will account for 40% of all listening to the typical station. In contrast, only 4.5% of '80s listeners are Ultra Core.

\* Ultra Core is defined as those listeners who tune in to a single station for more than 25 hours per week.



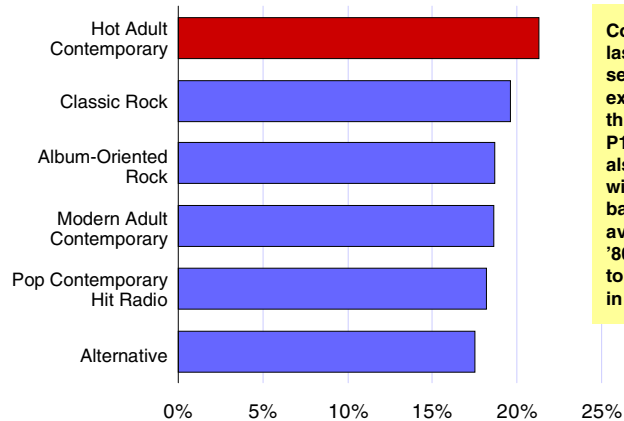
## What Formats Will Be Most Impacted by the '80s Format?



Every market is different, but when you compare the average age of the P1 listener (by far the most important kind of listener), you get a good idea of the formats that will compete most with the '80s.



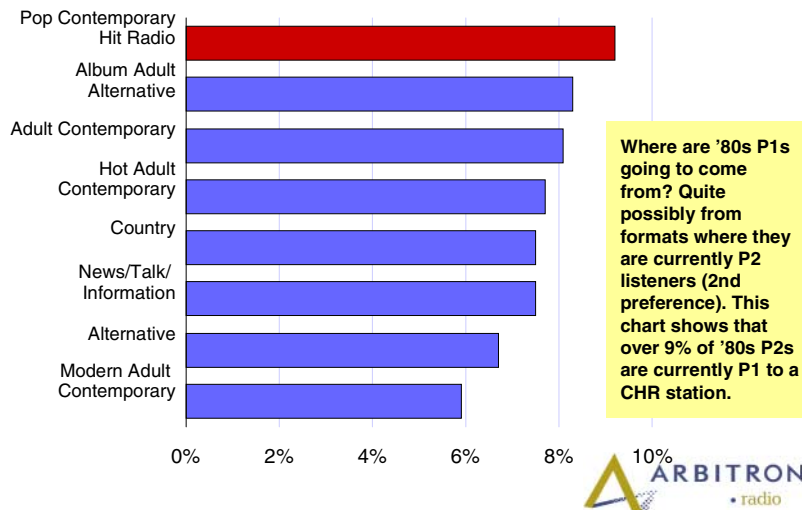
## What Other Formats Are '80s P1 Listeners Tuning In to in These Markets?



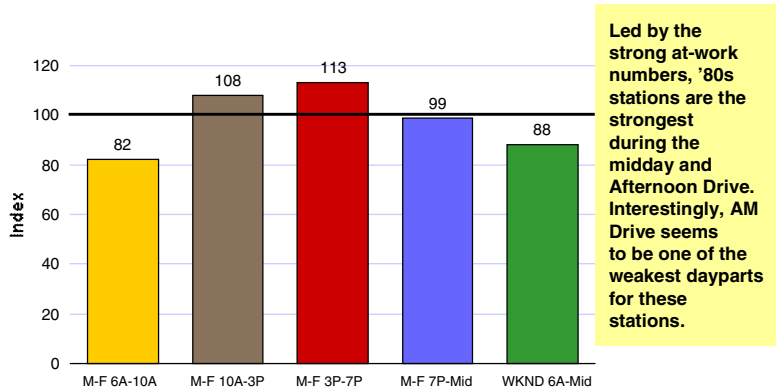
Consistent with the last chart, in the seven markets examined for this study, the '80s P1 listeners are also spending time with other Rock-based formats. On average, 21% of '80s P1s also listen to a Hot AC station in the market.



## When '80s Listeners Are P2, What Is Their P1 Station?



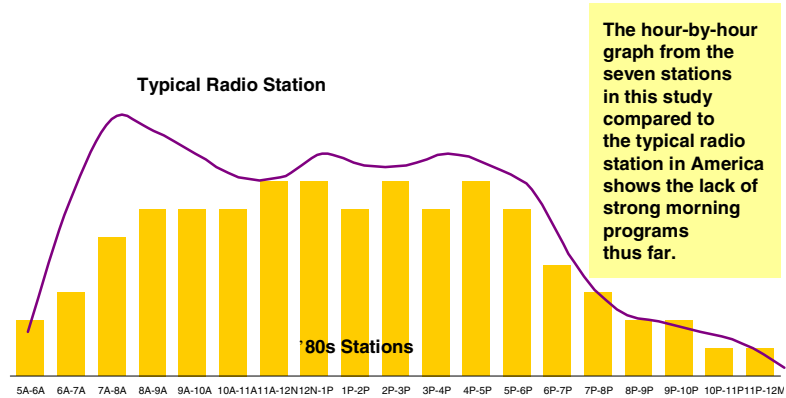
## Specific Daypart vs. Total Week Index for '80s Stations



An index of 113 would indicate that a particular daypart's share is 13% higher than the overall M-S, 6A-12M share. An index of 82 would indicate that a particular daypart's share is 18% lower than the average M-S, 6A-12M share.



## '80 Stations Have Opportunity in Morning Drive



## Findings

- The age range of '80s listeners is very tight; on average, almost half of the audience is 25-34. These would be listeners born somewhere between 1967 and 1976. The split between male and female listeners is roughly 50/50.
- At-work listening is key for '80s stations.
- Middays and PM Drive are the strongest dayparts for '80s stations. '80s stations have real growth opportunity in AM Drive.
- Increasing occasions of listening is needed to grow TSL to '80s stations.
- Based on the Fall survey, P1 listening to '80s stations is lower than the national average (AQH and cume) and lower than competing formats.
- Based on the average age of the '80s P1 listener, competition is mostly with Modern AC, Alternative, CHR and AOR.
- '80s stations deliver an upscale consumer.



## Stations Used for the Study

**KSTJ-FM Las Vegas**  
**WXST-FM Columbus, OH**  
**WMLL-FM St. Louis**  
**KYPT-FM Seattle-Tacoma**  
**KVMX-FM Portland, OR**  
**KXPK-FM Denver-Boulder**  
**WXXY-FM Chicago**

*All data based on Monday-Sunday 6A-12M, Metro.*



## Thanks

**Special thanks to John Fleetwood  
of Arbitron Research**

**For questions, contact John Snyder:  
(443) 259-7599  
john.snyder@arbitron.com**

