



Adult Hits 2006: Keeping Track Of Jack, Bob, and Pals



edison media research

What is the future of Adult Hits?

- Adult Hits is the wide-playlist, Classic Hits/Hot AC hybrid that was responsible for some of 2005's biggest success stories
- Despite its impact, Adult Hits faces the same questions about its future as any gold-based format; proponents say stations end up better off than where they were before
- Last year, Arbitron and Edison examined eight of the earliest Adult Hits outlets. Here, we extended that analysis to 38 stations that have at least three full ratings books

What is the future of Adult Hits?

- Of the 38 stations examined, 15 were up 25-54 in the winter '06 ratings, 22 were down, and one was flat
- But we also looked at Adult Hits stations throughout their format history. Of the 38 stations examined, 36 were measured against their previous format (two were launched on brand new frequencies). Of the 36 stations, 28 had higher ratings among 25-54s in winter '06 than in that station's last book before changing

Adult Hits Stations Analyzed

| Market | Call Letters | Nickname |
|--------------|--------------|--------------|
| Albuquerque | KDRF | Ed |
| Austin | KBPA | Bob |
| Bakersfield | KKXX | Pirate Radio |
| Baltimore | WQSR | Jack |
| Baton Rouge | KRDJ | Red |
| Boston | WMKK | Mike |
| Buffalo | WBUF | Jack |
| Chicago | WJMK | Jack |
| Chicago | WRZA | Nine |
| Cincinnati | WAXZ | Max |
| Columbus | WTDA | Ted |
| Dallas | KJJK | Jack |
| Denver | KJAC | Jack |
| Des Moines | KDRB | Planet |
| Detroit | WDRQ | Doug |
| Greensboro | WSMW | Simon |
| Indianapolis | WJJK | Jack |
| Jackson | WWJK | Jack |
| Kansas City | KCJK | Jack |

Base: M-Su 6AM to Mid, Winter 2006

Adult Hits Stations Analyzed (continued)

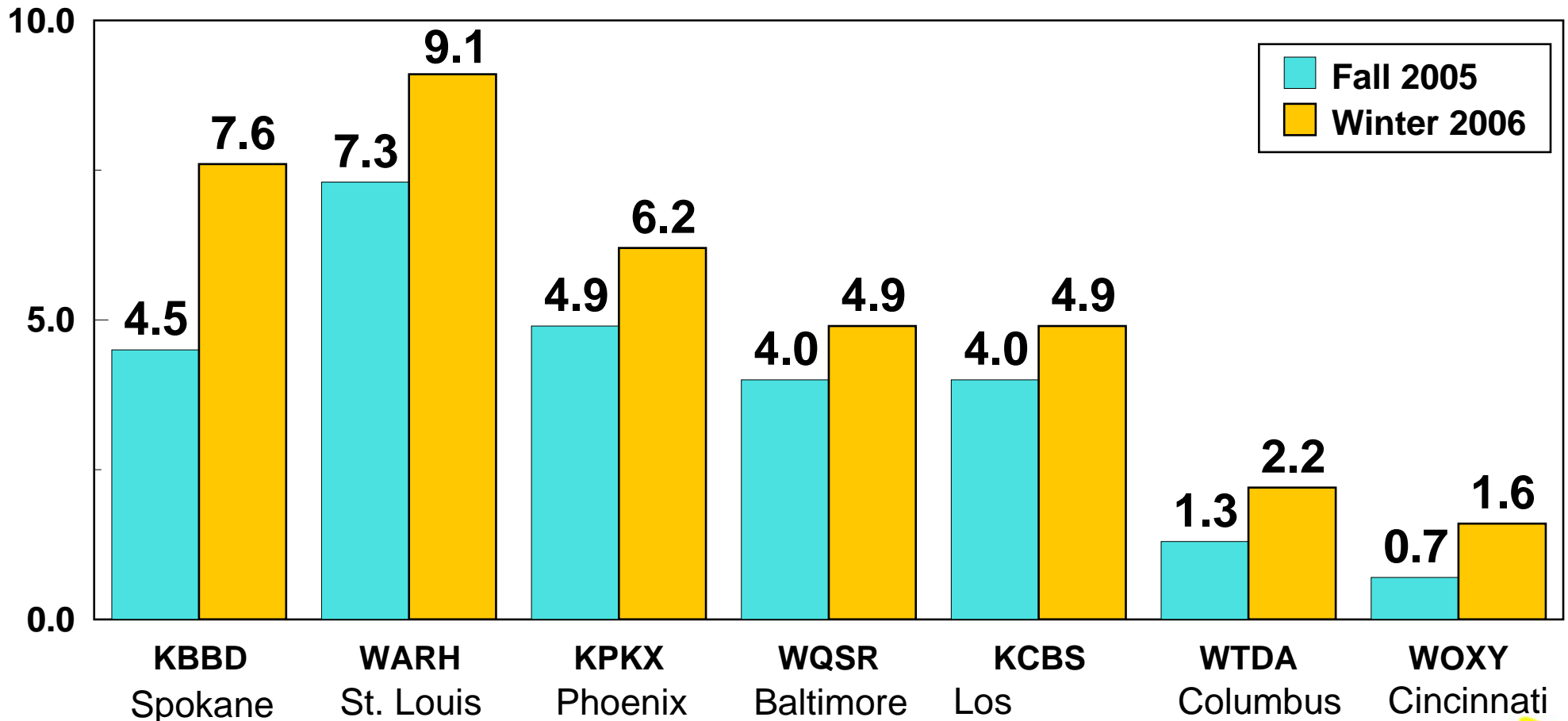
| Market | Call Letters | Nickname |
|----------------|--------------|----------|
| Las Vegas | KKJJ | Jack |
| Los Angeles | KCBS | Jack |
| Madison | WCHY | Charlie |
| Minneapolis | KZJK | Jack |
| Nashville | WCJK | Jack |
| New York | WCBS | Jack |
| Norfolk | WPYA | Bob |
| Oklahoma | KQOB | Bob |
| Omaha | KCTY | Bob |
| Philadelphia | WBEN | Ben |
| Phoenix | KPKX | The Peak |
| Portland | KYCH | Charlie |
| Salt Lake City | KJQN | Jack |
| San Diego | KFMB | Jack |
| San Francisco | KMAX | Max |
| Seattle | KJAQ | Jack |
| Spokane | KBBB | Bob |
| St. Louis | WARH | The Arch |
| Tuscon | KSZR | Bob |

Base: M-Su 6AM to Mid, Winter 2006

Several Adult Hits stations were up nicely in the winter book

Top Share Gainers F '05 vs. W '06, Persons 25-54

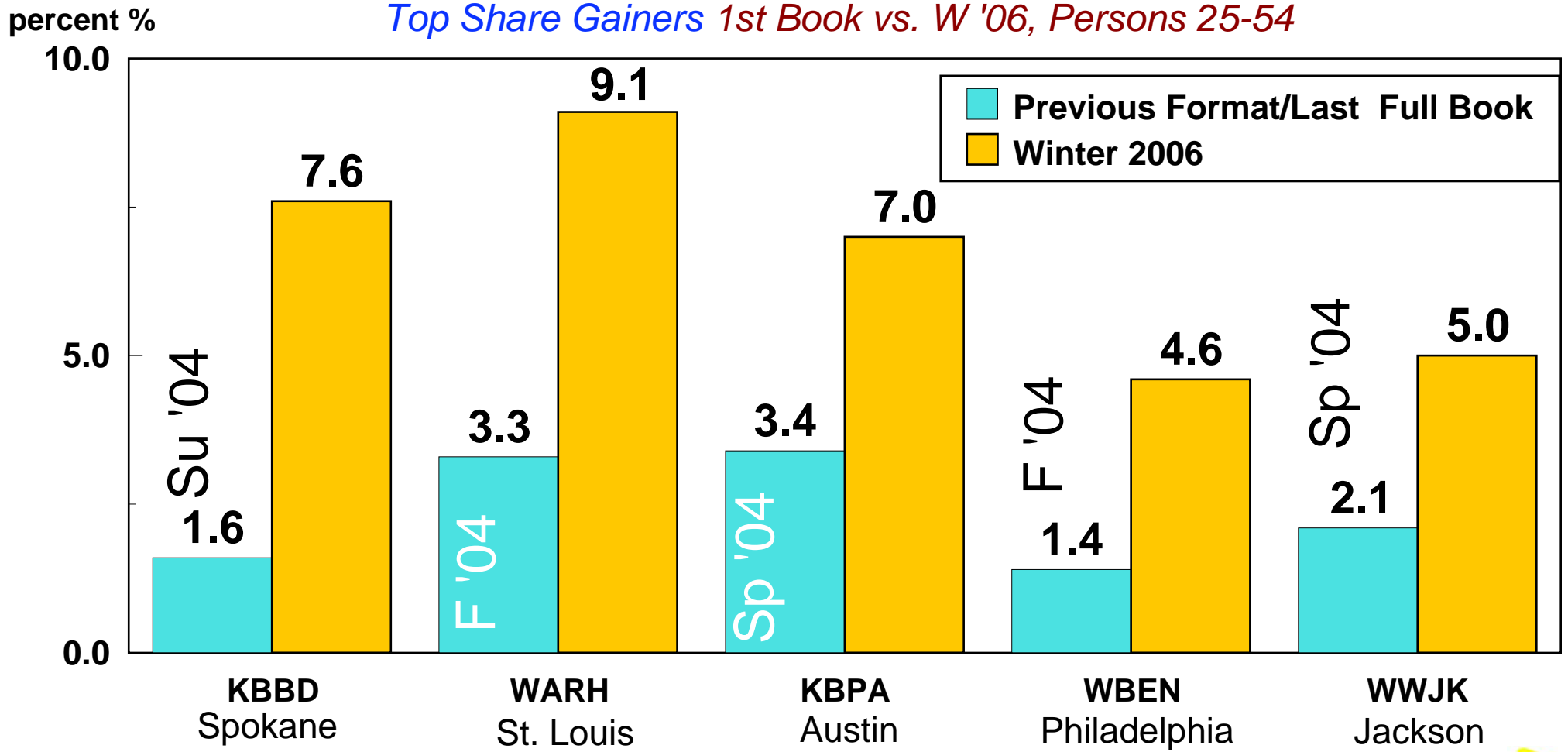
percent %



Base: M-Su 6AM to Mid

Some have net gains of up to six shares 25-54 throughout their format history

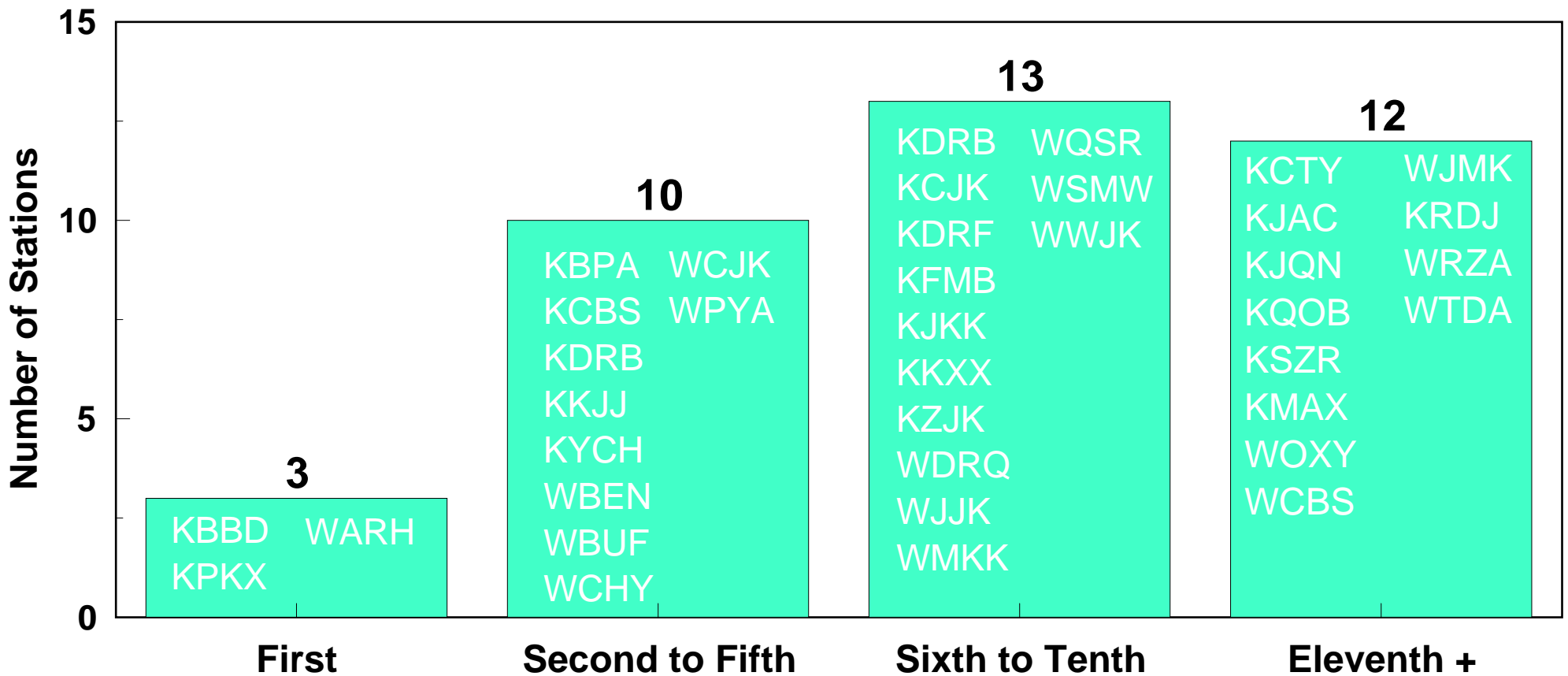
Top Share Gainers 1st Book vs. W '06, Persons 25-54



Base: M-Su 6AM to Mid

Three stations lead 25-54 AQH -- including format veteran KPKX, Phoenix

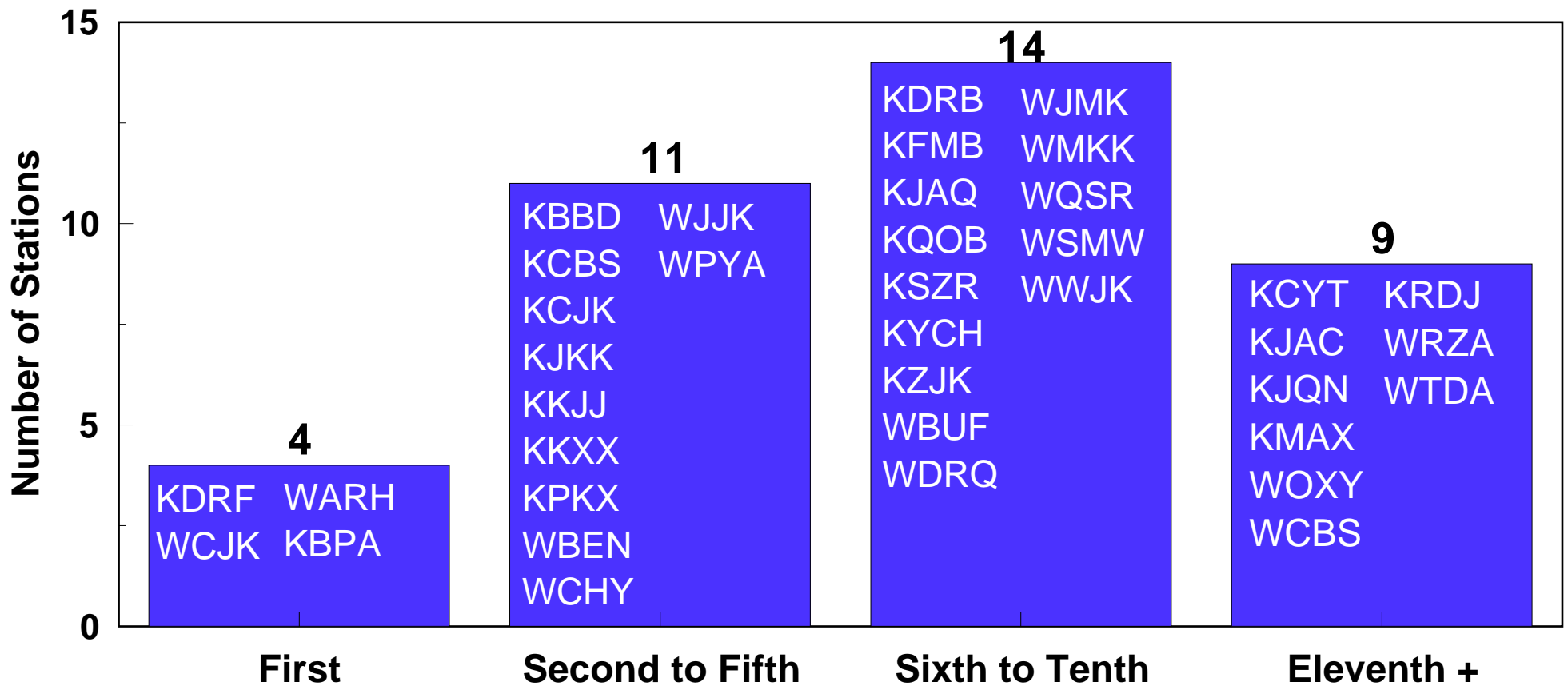
Adult Hits AQH Rank, Persons 25-54



Base: M-Su 6AM to Mid, Winter 2006

Four lead market in 25-54 cume

Adult Hits Cume Rank, Persons 25-54



Base: M-Su 6AM to Mid, Winter 2006

Only one station ranks higher in TSL than it ranks in cume

Top Cume Rank, Persons 25-54

| Call Letters | Market | Cume Rank | TSL Rank |
|--------------|-------------|-----------|----------|
| WCJK | Nashville | 1 | 17 |
| WARH | St. Louis | 1 | 7 |
| KDRF | Albuquerque | 1 | 32 |
| KBPA | Austin | 1 | 19 |
| KPKX | Phoenix | 2 | 8 |
| KCBS | Los Angeles | 2 | 32 |
| KBBD | Spokane | 2 | 7 |

Base: M-Su 6AM to Mid, Winter 2006

Not one Adult Hits station is in the top 5 in TSL

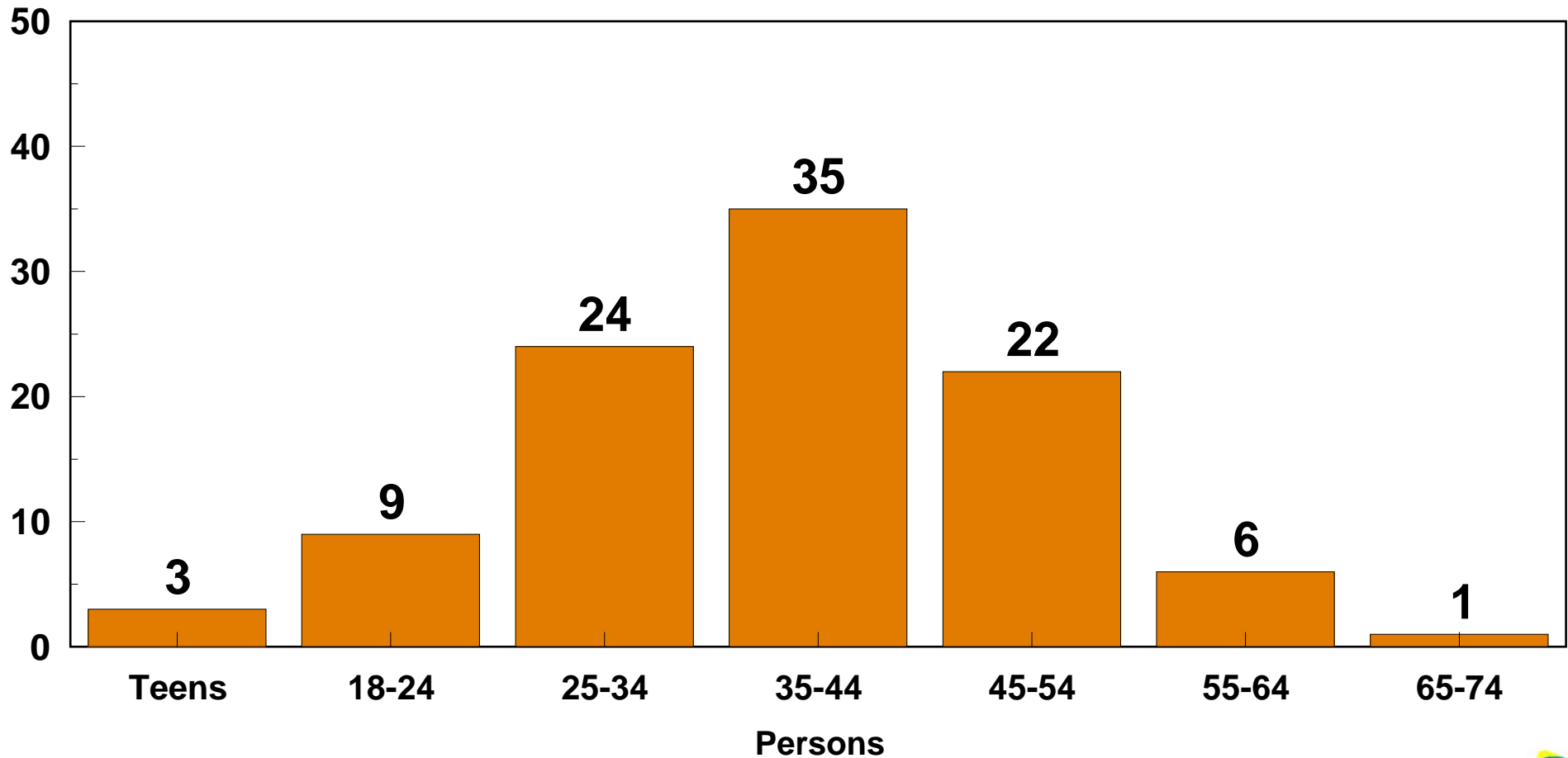
Top TSL Rank, Persons 25-54

| Call Letters | Market | TSL Rank | Cume Rank |
|--------------|------------|----------|-----------|
| KDRB | Des Moines | 6 | 8 |
| WARH | St. Louis | 7 | 1 |
| KBBD | Spokane | 7 | 2 |
| KPKX | Phoenix | 8 | 2 |
| WPYA | Norfolk | 13 | 2 |
| KKJJ | Las Vegas | 13 | 4 |
| WBUF | Buffalo | 13 | 6 |

Base: M-Su 6AM to Mid, Winter 2006

Adult Hits is extremely efficient 25-54; more than 80% of listening is in this 'money demo'

Percent of Adult Hits Audience by Age

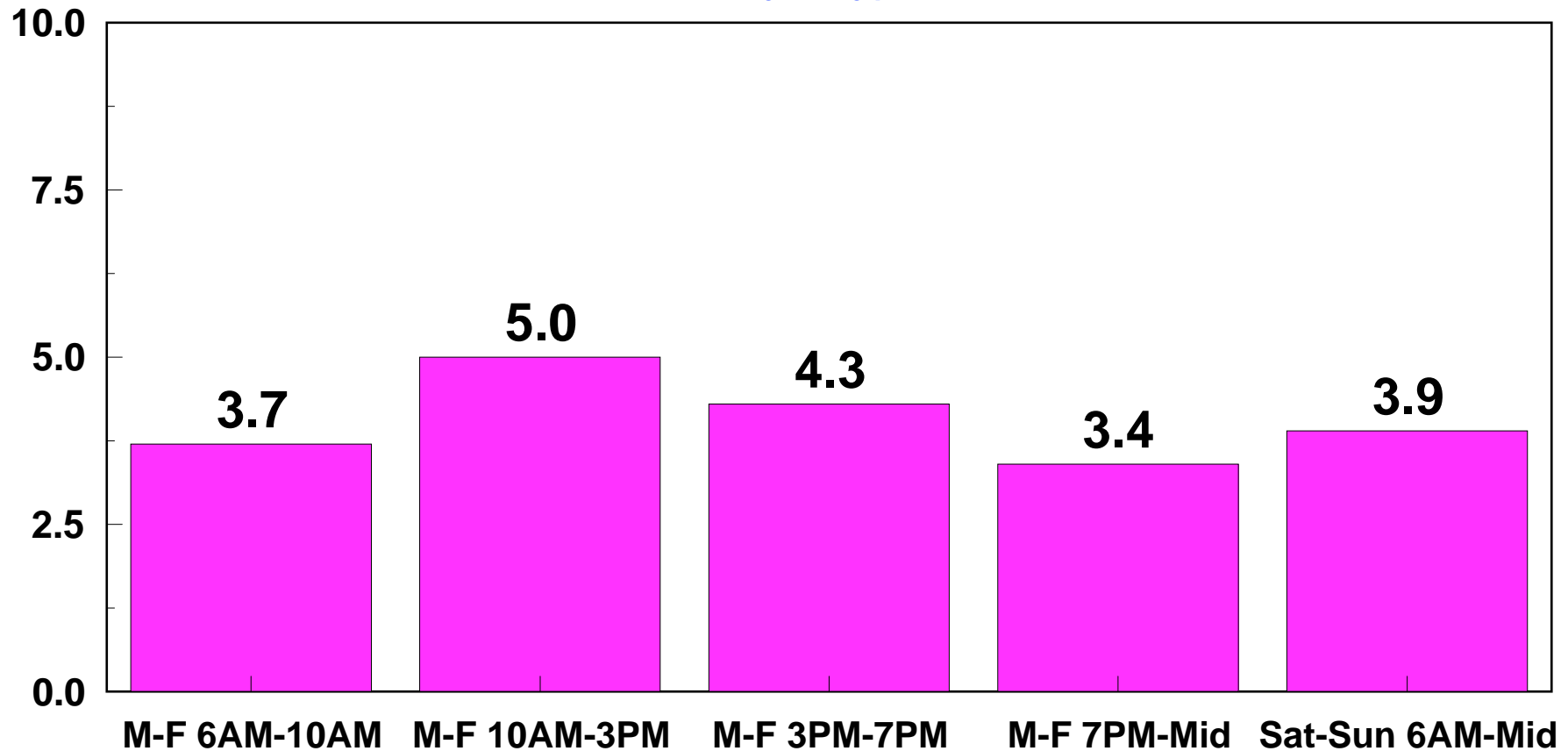


Base: M-Su 6AM to Mid, Winter 2006, 38 stations

The format is competitive in all dayparts; performs best in middays

Adult Hits Share by Daypart, Persons 25-54

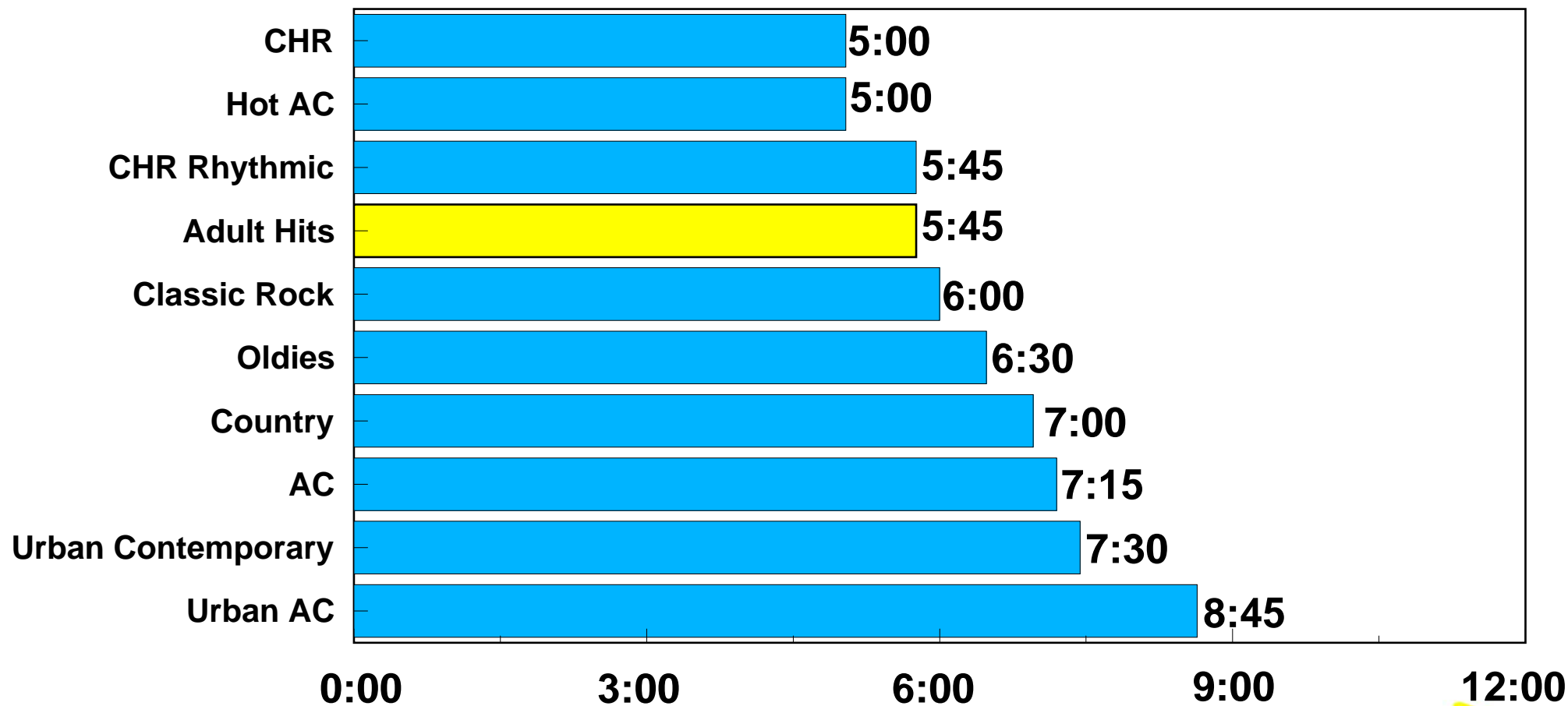
percent %



Base: M-Su 6AM to Mid, Winter 2006, 38 stations

Adult Hits TSL trails AC, Classic Rock; Leads Hot AC

TSL compared to other formats, Persons 12+

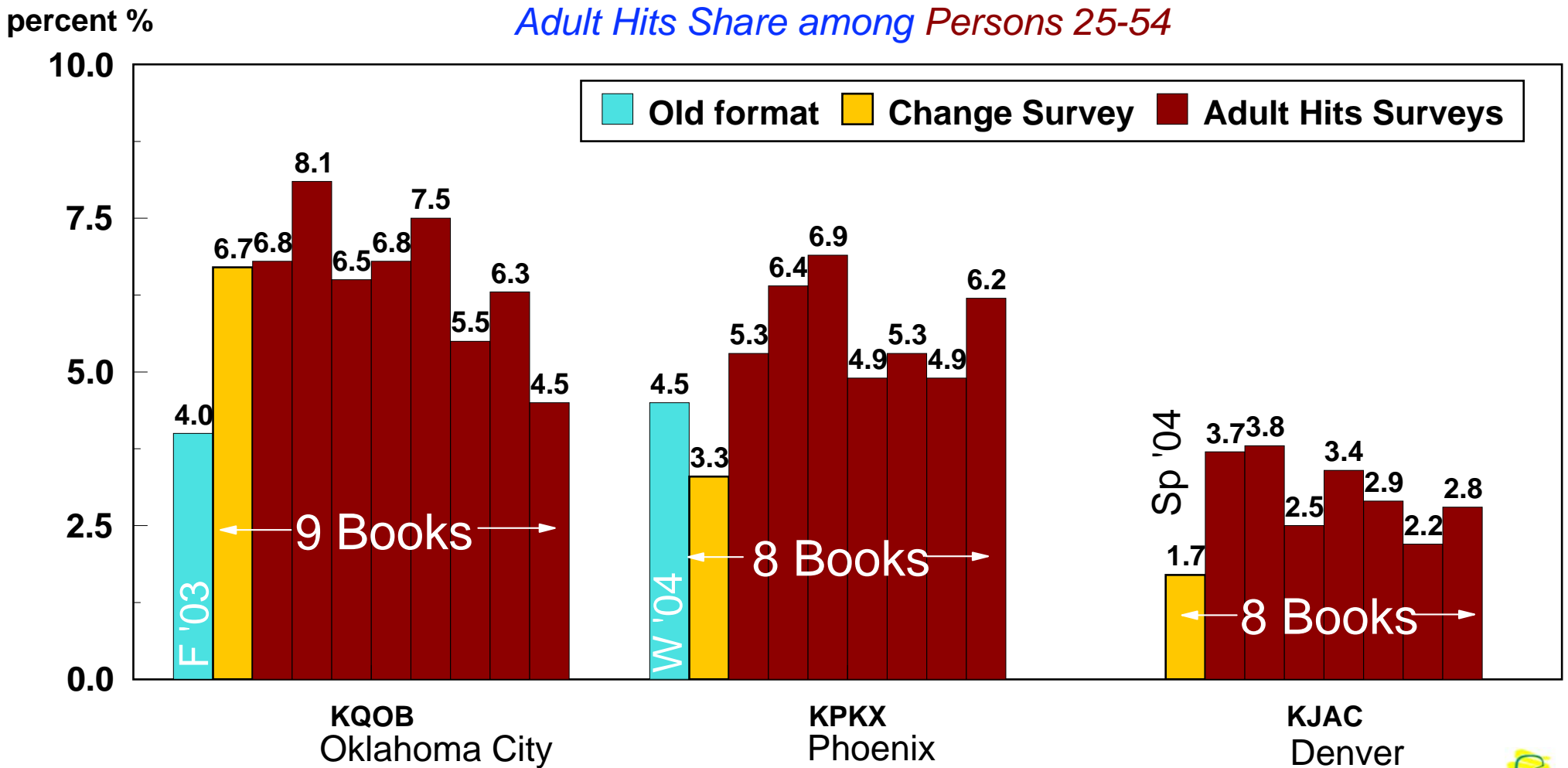


Base: M-Su 6AM to Mid, Winter 2006

Tracking Adult Hits Book By Book

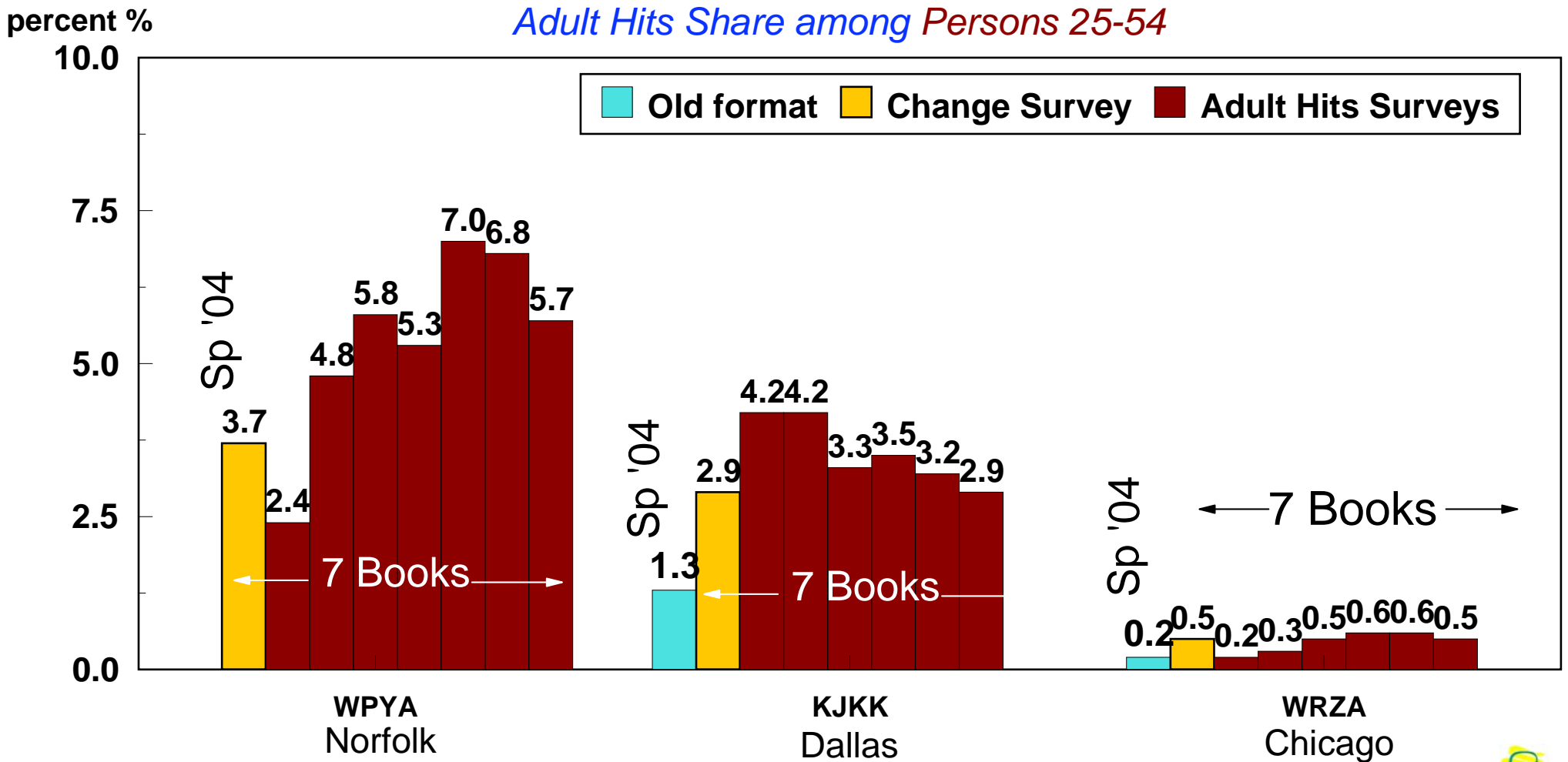
How the Adult Hits stations have fared over time--tracked from oldest (nine books) to the newest of those stations examined here (three books)

Adult Hits pioneers have found "Peaks" and valleys, not just a boom and bust



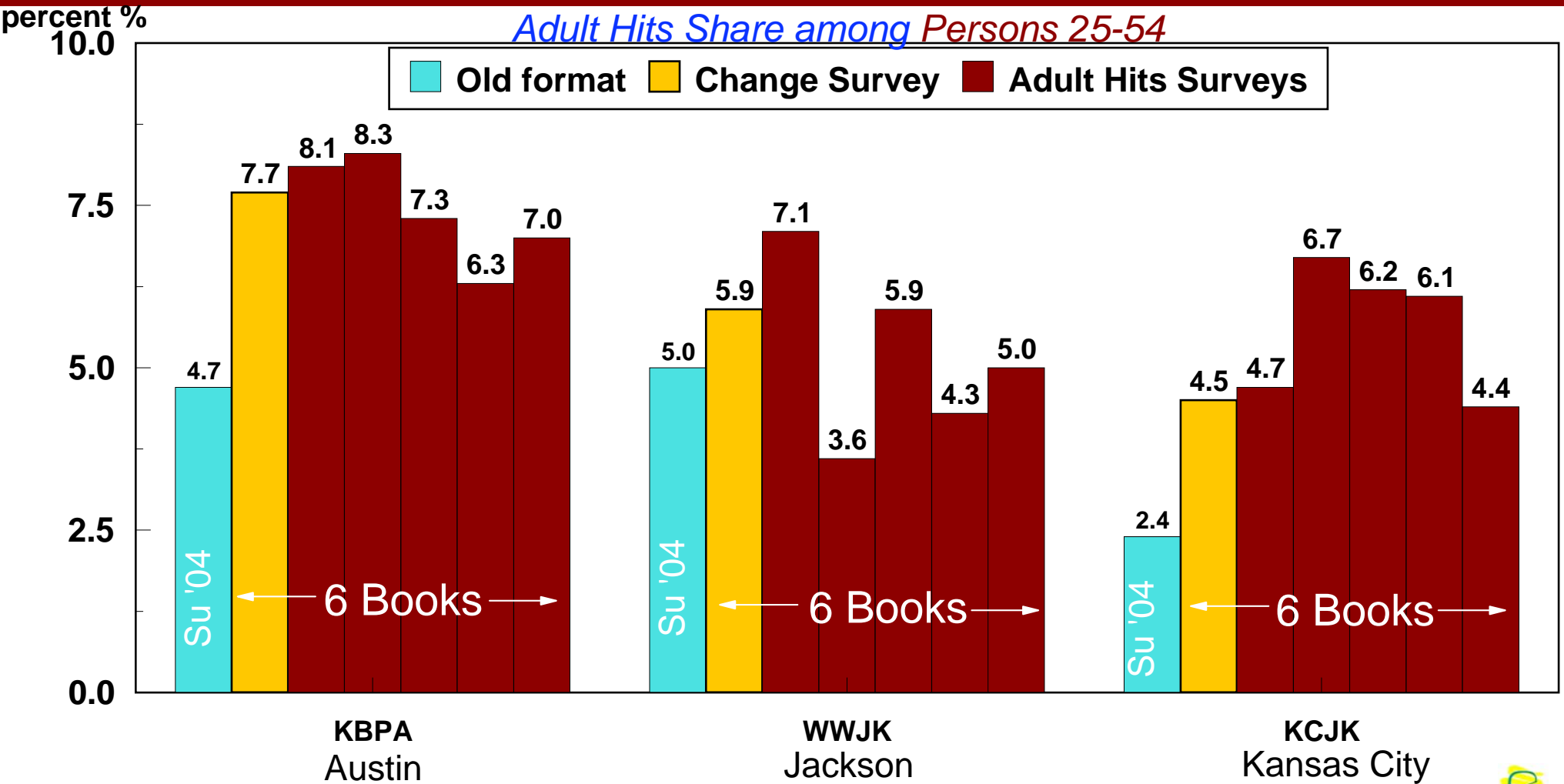
Base: M-Su 6AM to Mid

Seven-book stations changed as the format was picking up steam in the U.S.



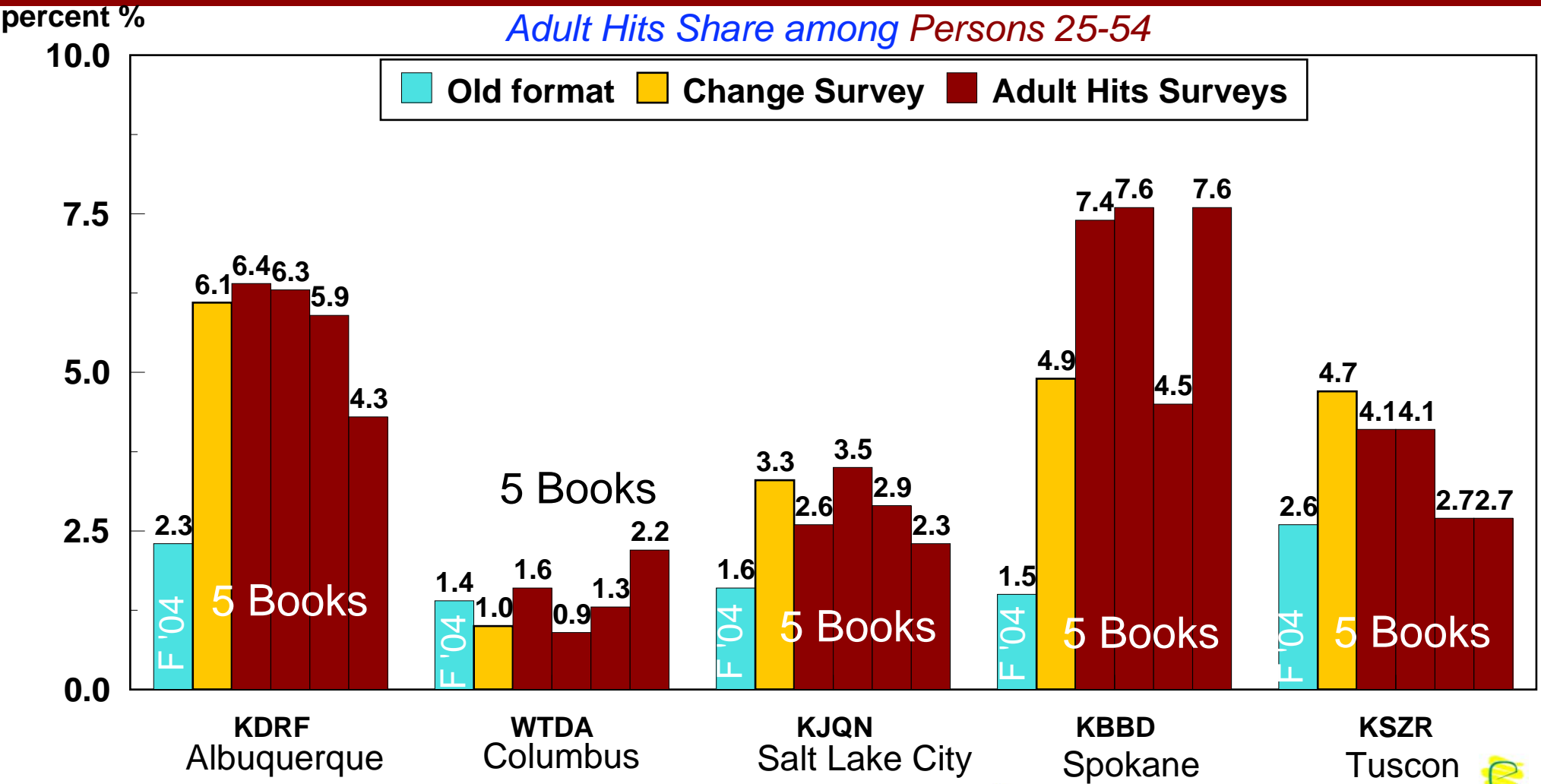
Base: M-Su 6AM to Mid

Six bookers have been in format for nearly two years, seeing both levelling and rebounds



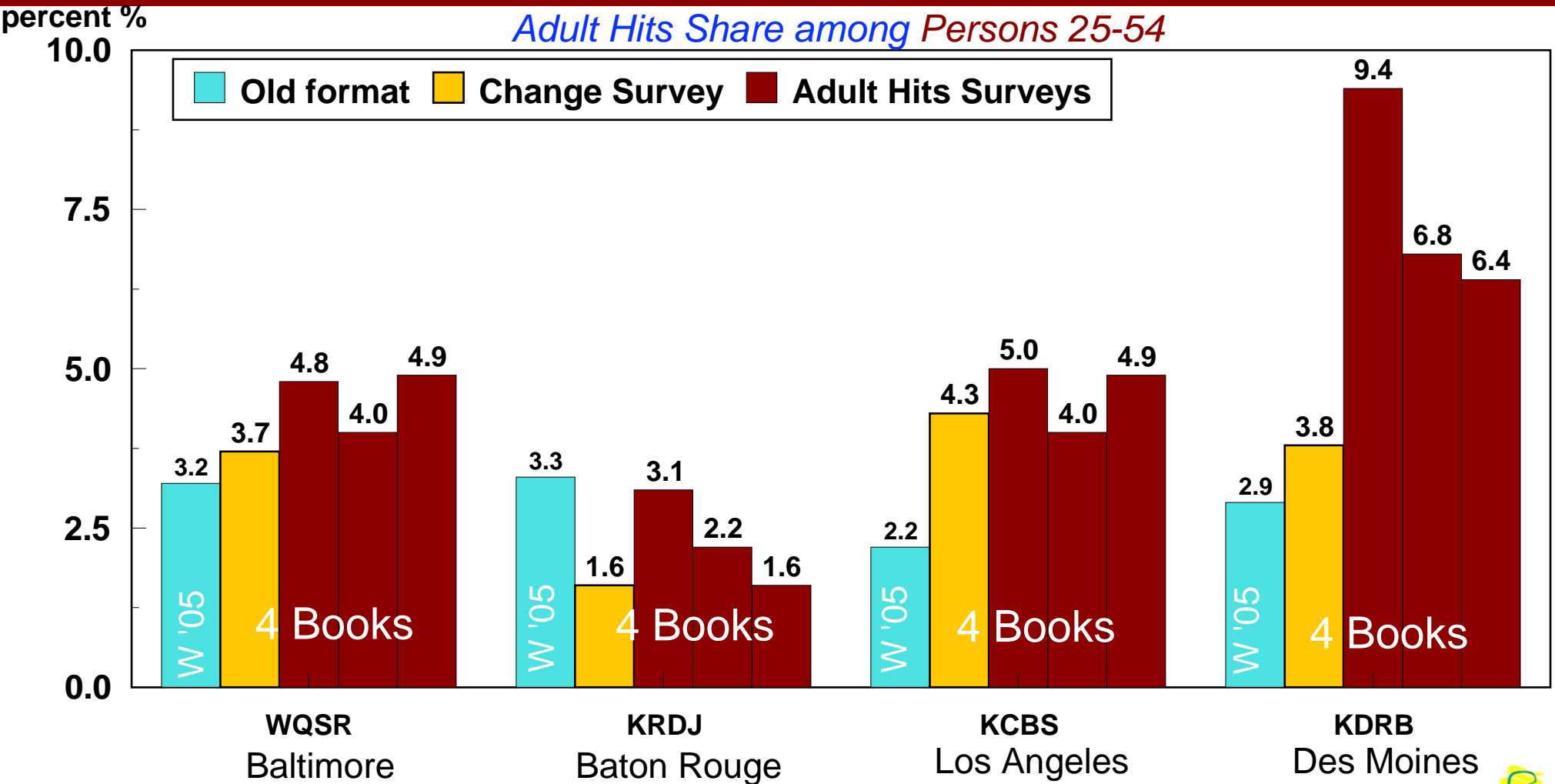
Base: M-Su 6AM to Mid

Several of the five-book stations have exhibited an up-and-then-down pattern



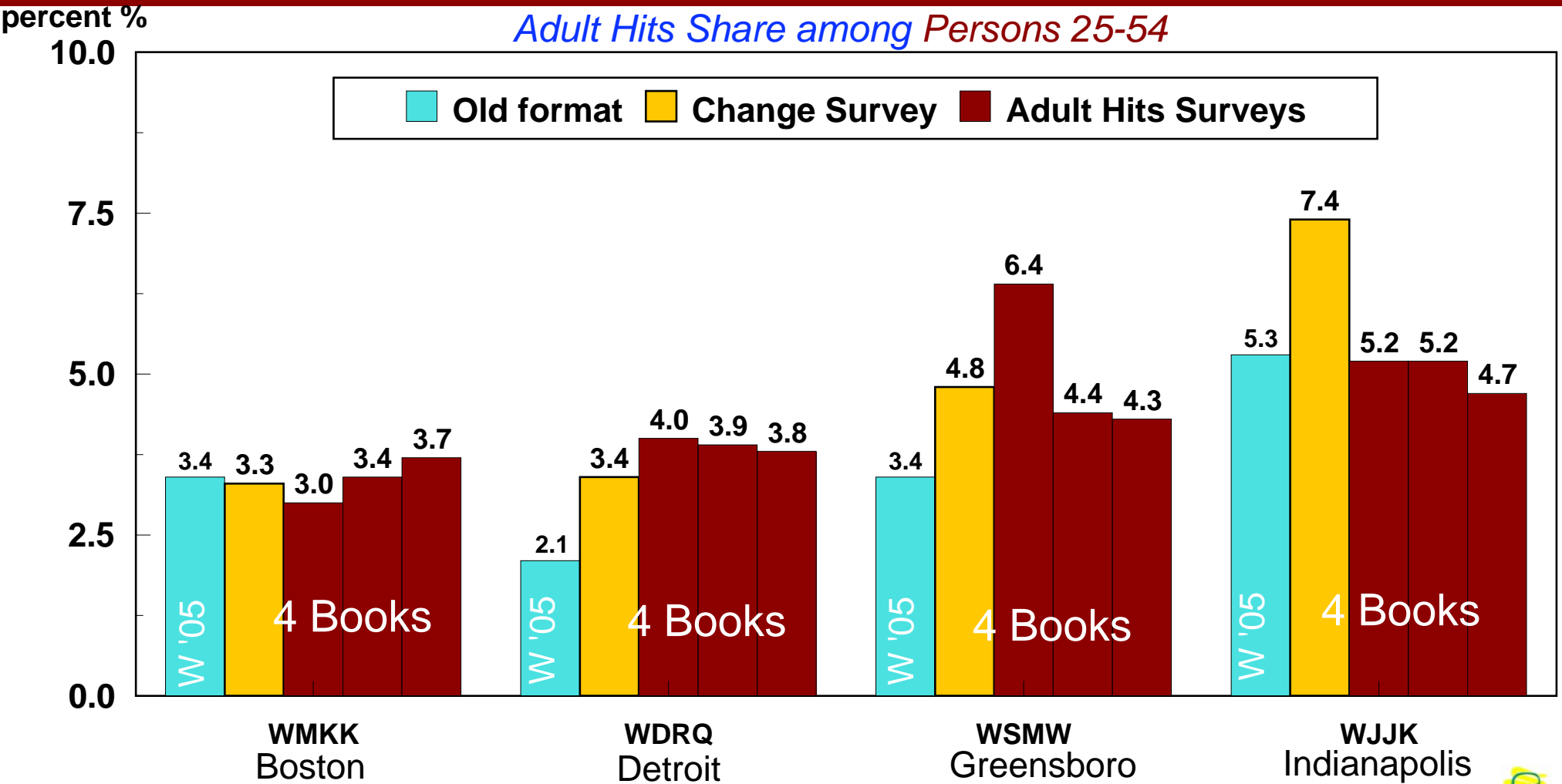
Base: M-Su 6AM to Mid

Four-book stations were those launched during 2005's format gold rush



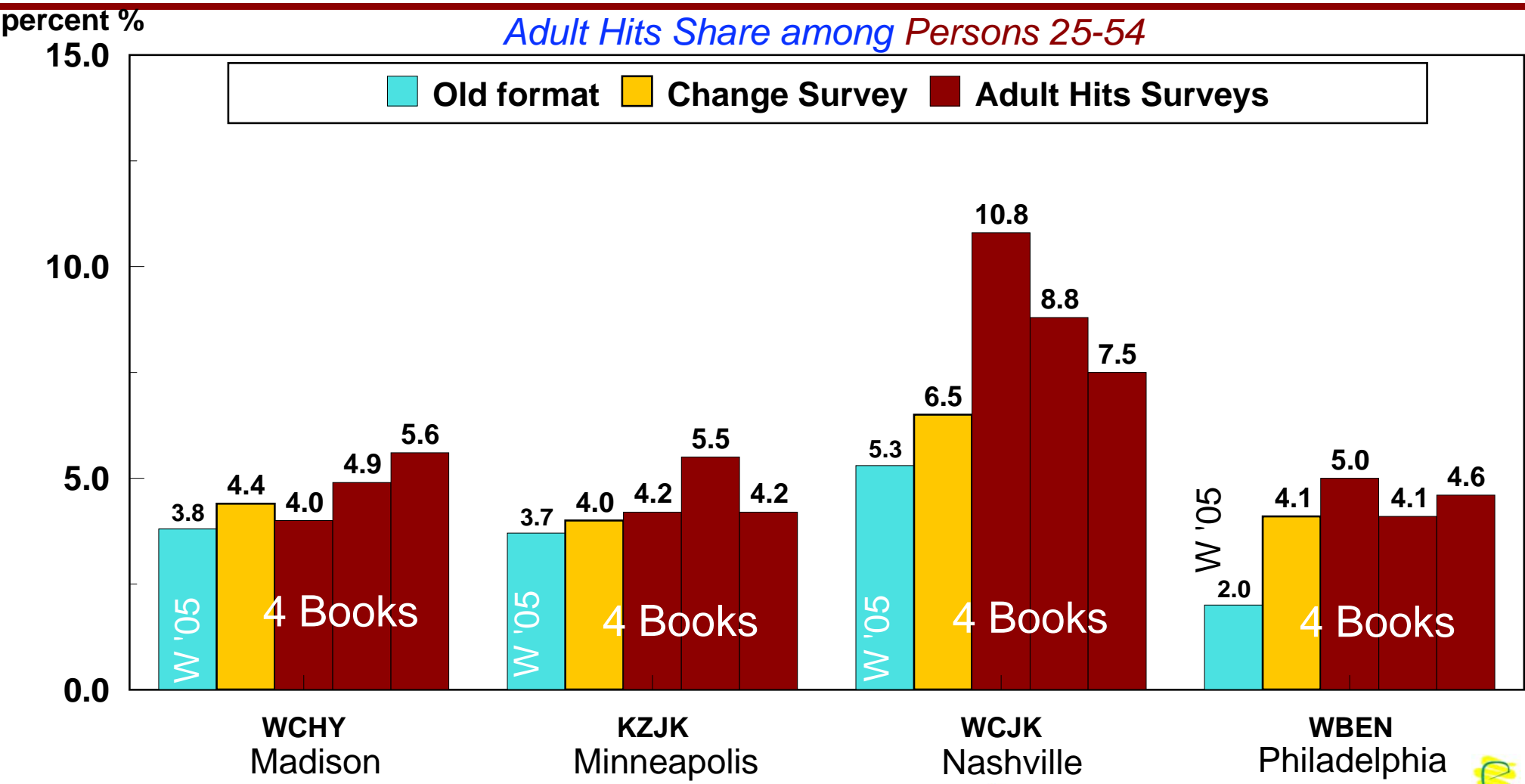
Base: M-Su 6AM to Mid

Some exploded immediately; others (like Boston) are actually seeing their best numbers now



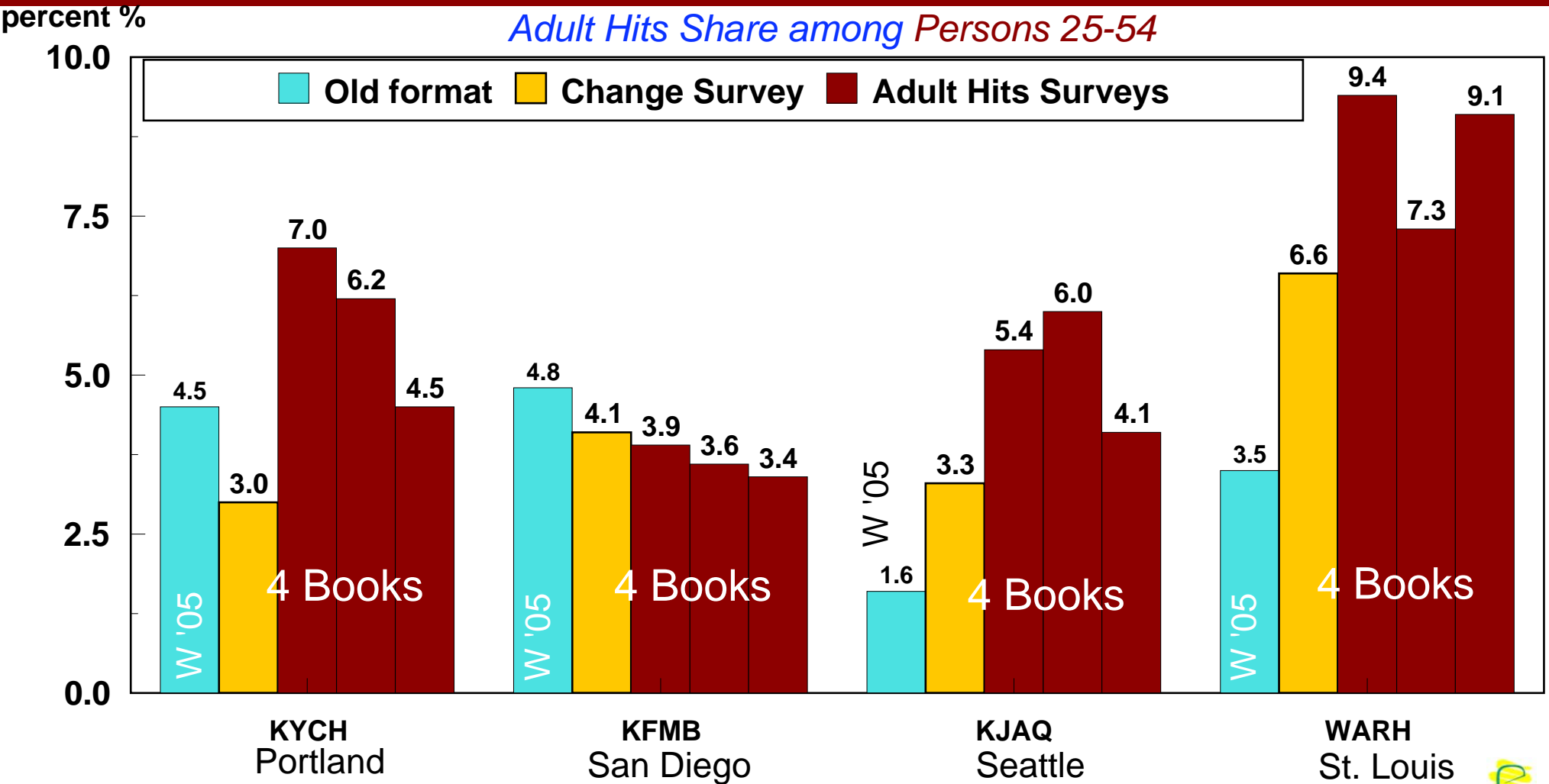
Base: M-Su 6AM to Mid

Some, like Nashville, still have impressive numbers even after substantial levelling



Base: M-Su 6AM to Mid

The Arch (WARH) St. Louis has the highest share of any Adult Hits Station

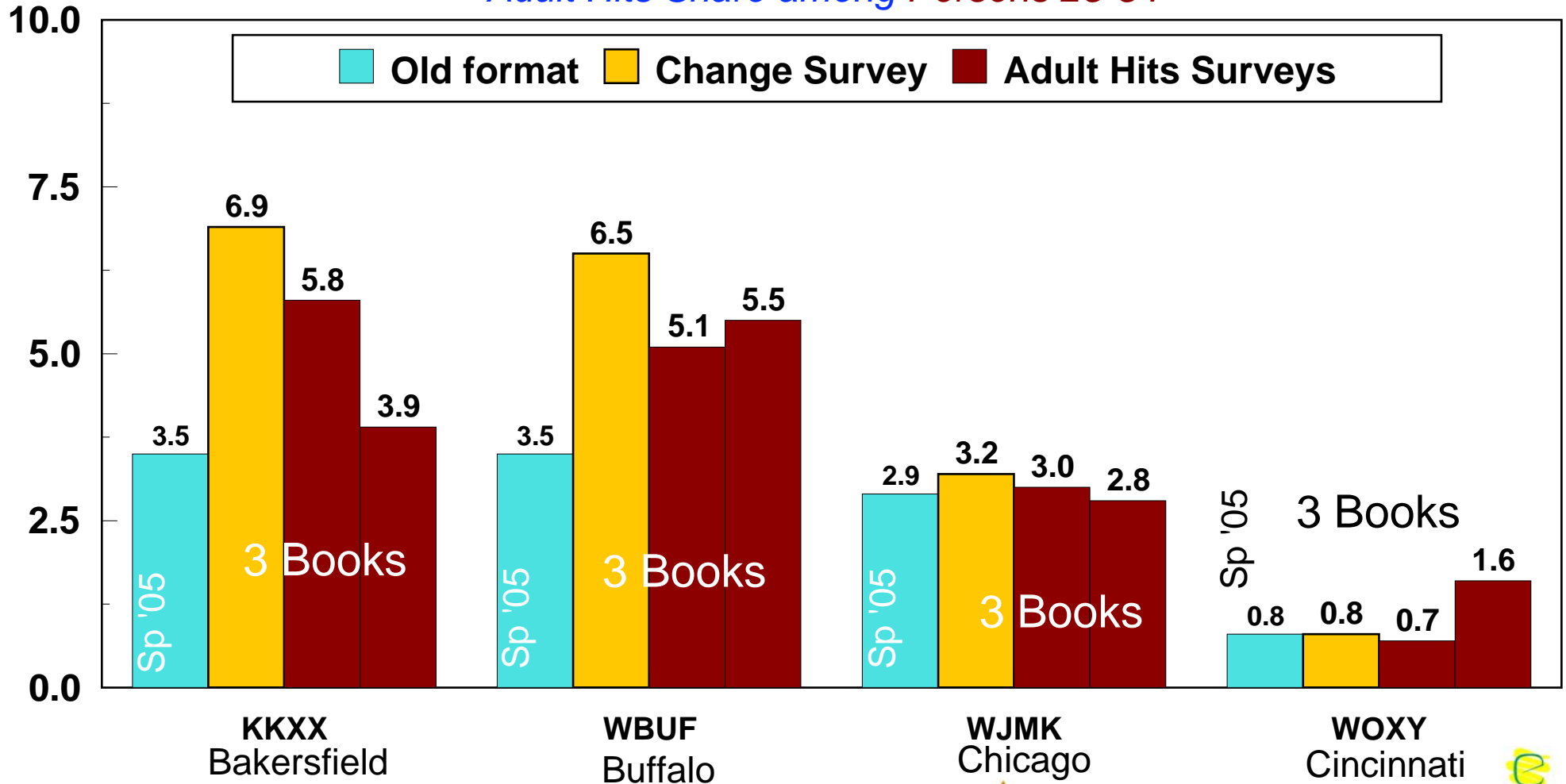


Base: M-Su 6AM to Mid

Three-book Adult Hits stations changed after the first explosive results at KCBS/L.A.

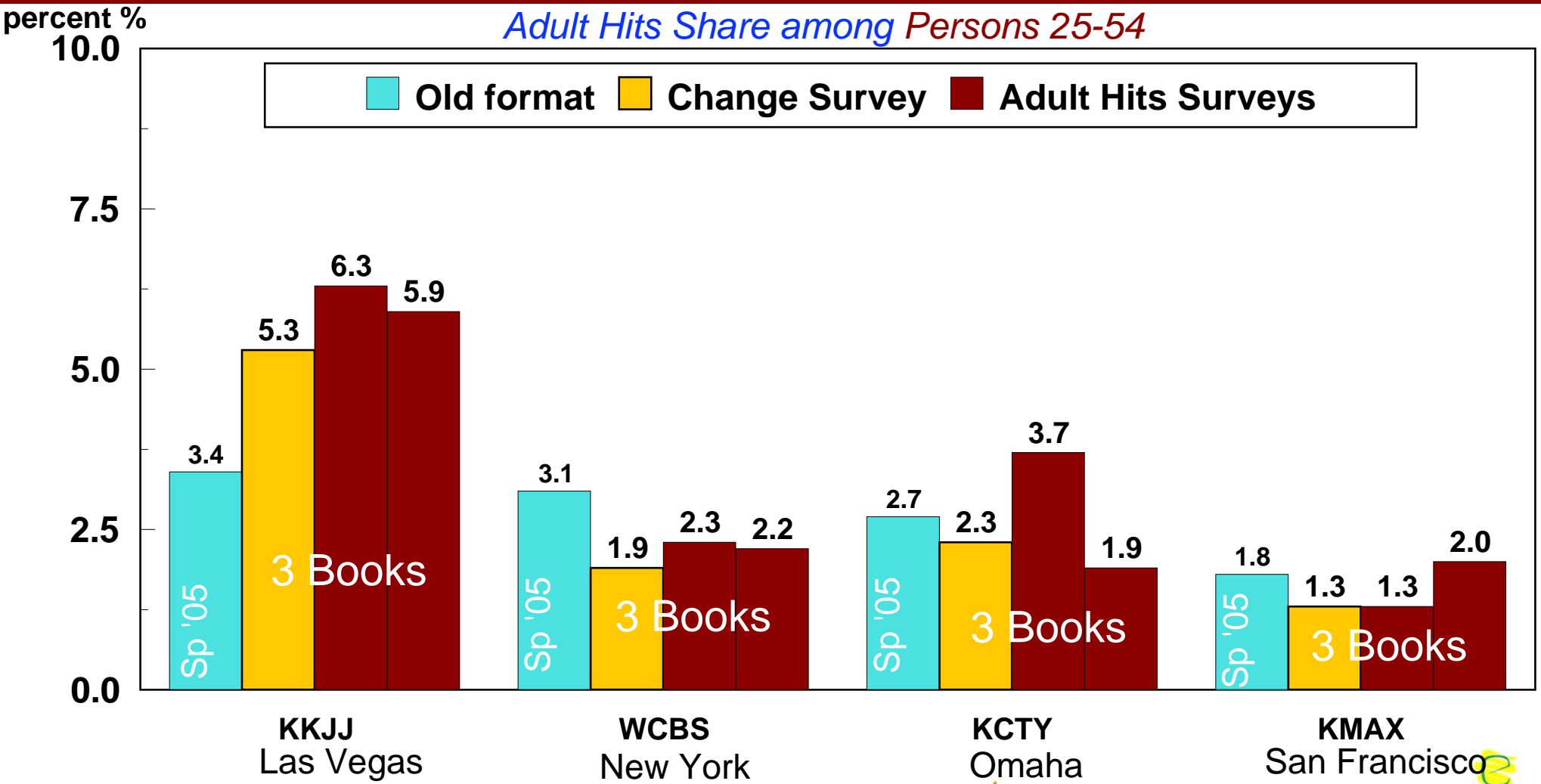
percent %

Adult Hits Share among Persons 25-54



Base: M-Su 6AM to Mid

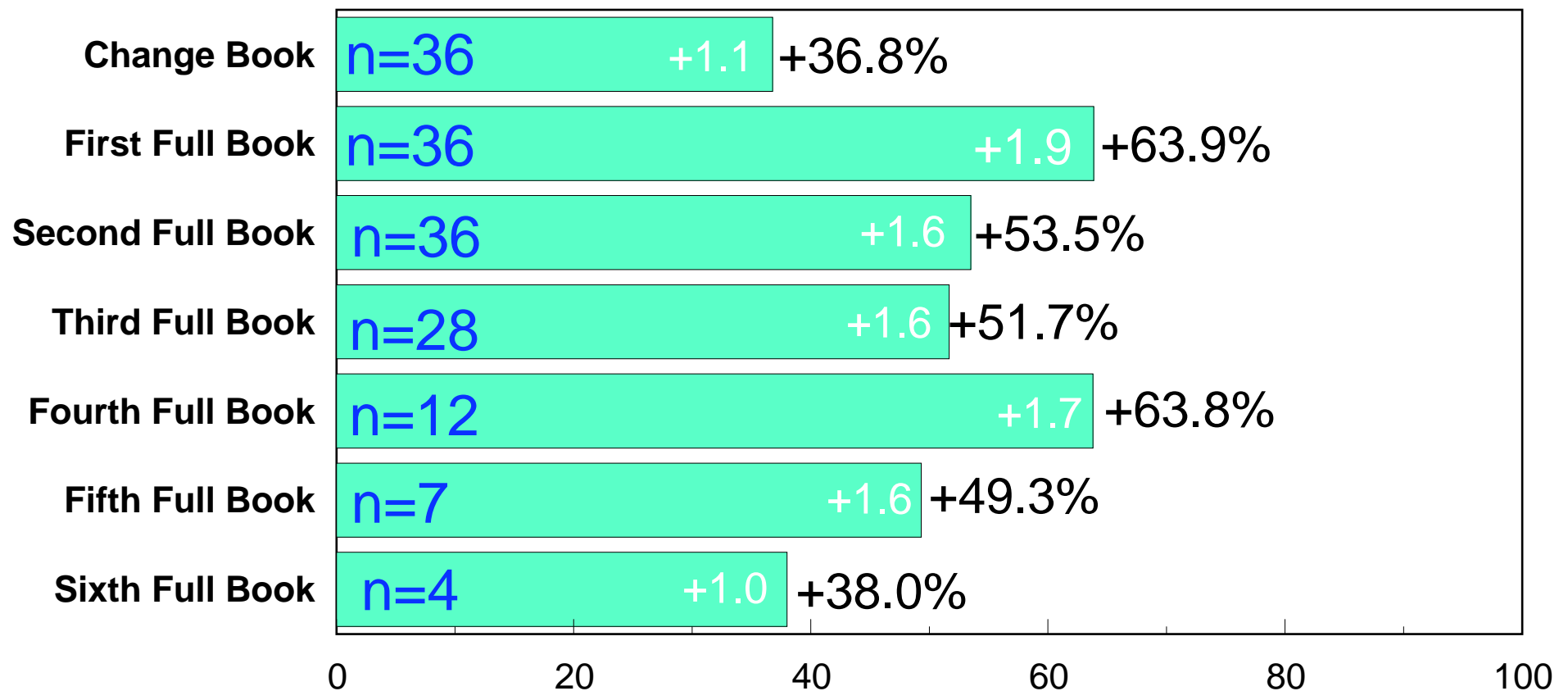
The format has struggled in some of the biggest markets like New York and San Francisco



Base: M-Su 6AM to Mid

After a year or more, on average Adult Hits stations are well ahead of their previous format

Adult Hits Average Share Gain/Loss from Last Book in Prior Format, Persons 25-54*

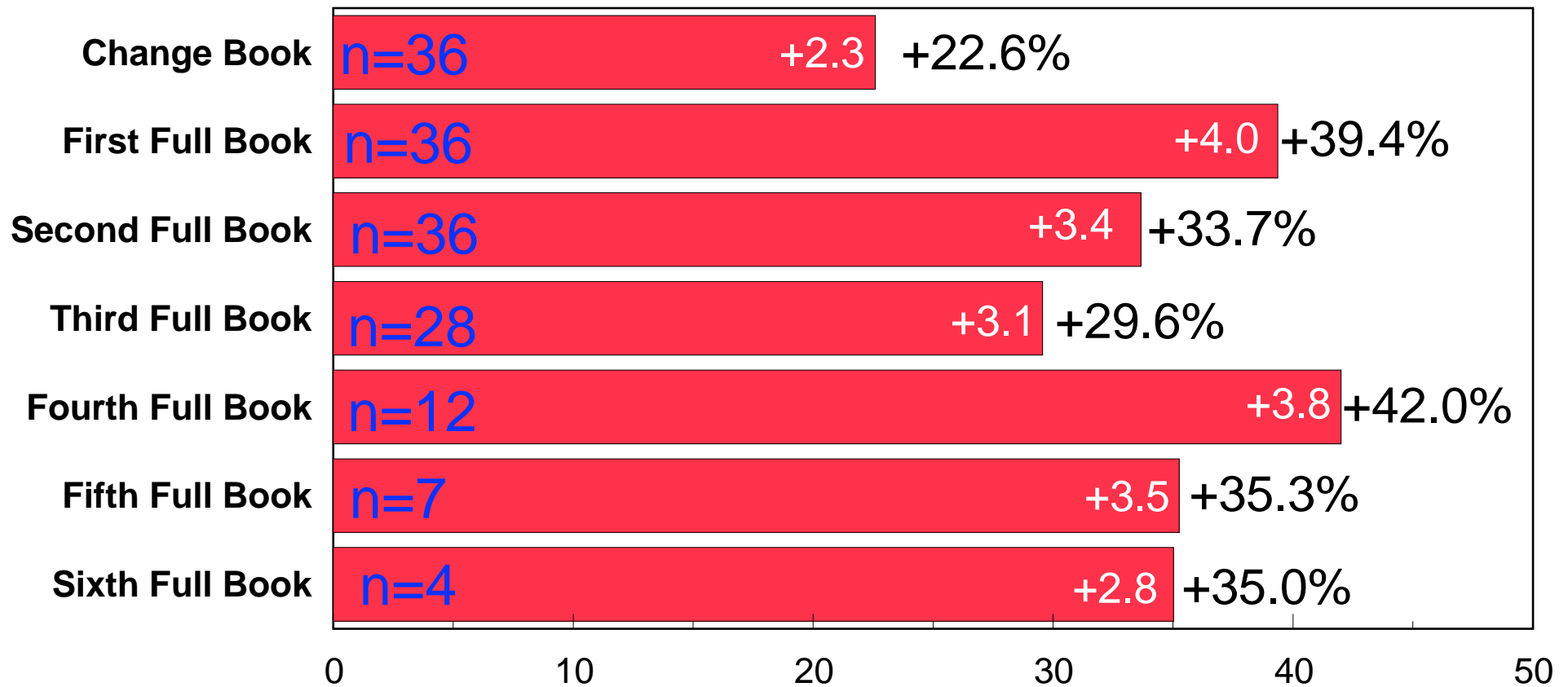


Base: M-Su 6AM to Mid, Winter 2006, 38 stations

*-36 of the 38 stations had a prior format

Stations show significant cume gains and hold on to them

Adult Hits Average Cume Gain/Loss from Last Book in Prior Format, Persons 25-54*

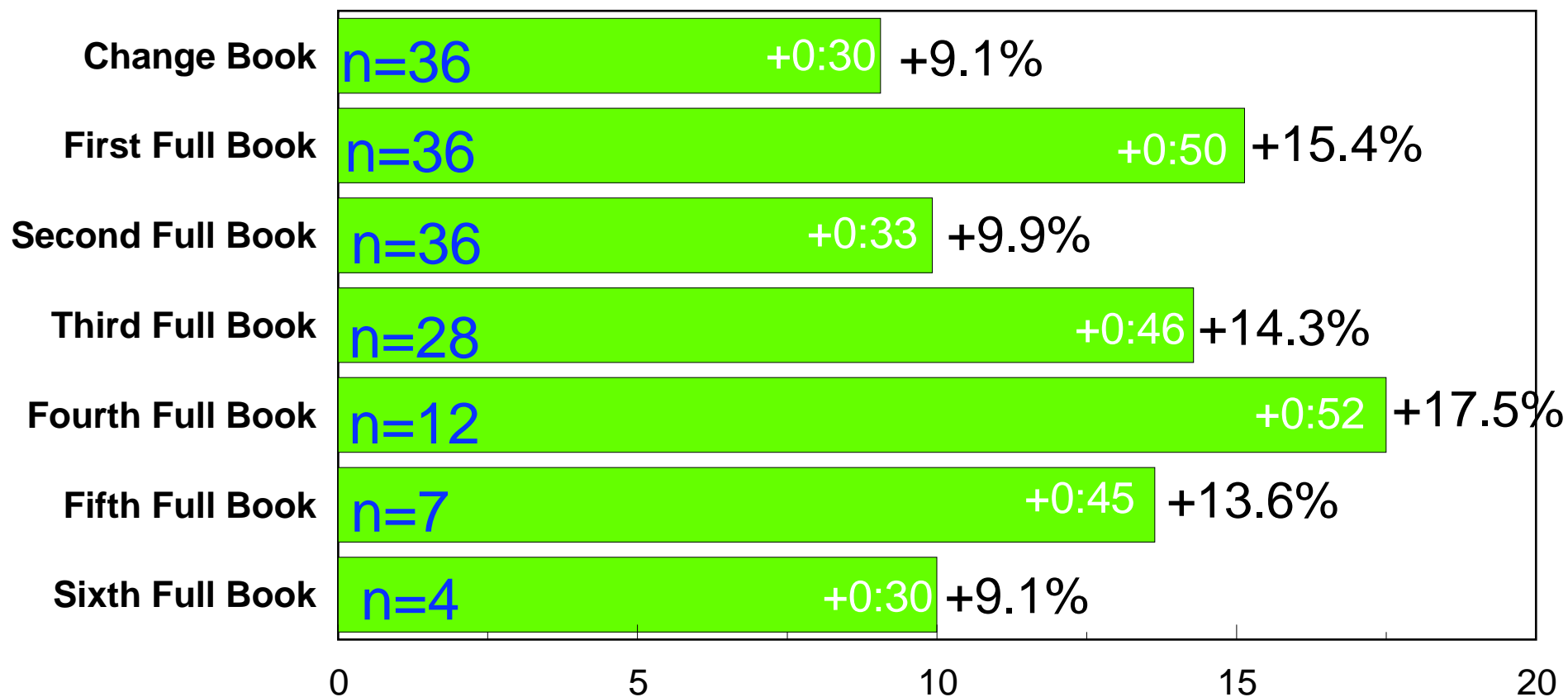


Base: M-Su 6AM to Mid, Winter 2006, 38 stations

*-36 of the 38 stations had a prior format

A small but real gain in TSL also sustains

Adult Hits Average TSL Gain/Loss from Last Book in Prior Format, Persons 25-54*



Base: M-Su 6AM to Mid, Winter 2006, 38 stations

*-36 of the 38 stations had a prior format

Does Adult Hits have a second act?

- Of the 14 stations with five or more books, six had their best 25-54 number in book No. 3
- Among all stations, the largest number of best books are in book No. 2 (15 stations) or No. 3 (10 stations)
- Of 38 stations, at least half have already rebounded at least once from a down book--defying the perception of a format that never recovers once the "oh wow" value of its music wears off

Conclusions:

- While the majority of Adult Hits stations were down fall '05 to winter '06, for most stations Adult Hits represents an improvement on their previous formats -- in some cases a vast improvement
- Of the 36 stations with previous formats, 28 have improved their 25-54 ratings, two are flat, and only six are down
- The largest number of Adult Hits stations examined had their best 25-54 ratings to date in book No. 2 or 3, but . . .

Conclusions (continued):

- Few of the stations have actually shown the pure up, then down pattern of the type many expected from a gold-based station
- A few Adult Hits stations that did not explode immediately are starting to build, more than a year after launch, in some cases
- As more stations build tenure in the format, the number of stations showing the normal up/down pattern of any long-running station is likely to increase



For More Information:

Contact Gary Marince from Arbitron at 412-859-3740

Or contact Sean Ross from Edison at 908-707-4707

edison media research



www.edisonresearch.com