

San Francisco Radio Review

Fall 2007 Arbitron, Adults 25-54

Once again, San Francisco experiences a number of interesting station changes with the release of the 2007 Fall Arbitron. Consider these items:

- After an uneven year, 2007 goes out on a high note with an unusual amount of late Q4 activity
- 2008 begins with an early primary season, a drawn-out writers strike and talks of recession
- Music stations continue to dominate 25-54 ratings, marginalizing once dominant news and talk properties
- Arbitron announces a delay in converting to PPM technology in San Francisco (until 9/08) causing stations to rethink weak formats and launch plans.

1. KOIT - 96.5 FM (Soft Adult Contemporary) 4.5

Entercom

KOIT maintains the #1 position, but flipping to *All Christmas Music* does not deliver the usual holiday 'treats.' The year to year ratings decline is 13% without the heavy TV campaign that typically accompanies the seasonal change. *Lite Rock Less Talk* continues to excel with women who enjoy the soothing blend of in-office favorites during the work day. The station skews 67% female under the first full year with Entercom.

Duplication: KIOI (23%), KISQ (18%), KCBS (16%)

Cume -2.7%

TSL +1.6%

FA '06 #1

WI '07 #1

SP '07 #2

SU '07 #1

2. KFOG/KFFG - 104.5 FM/ 97.7 FM (Adult Album Alternative) 3.9

Cumulus

KFOG comes in at #2 and provides the perfect antidote for those seeking no-hype, authentic, *world class rock*. AMD host Dave Morey celebrates his 25 year anniversary in an intelligent, low-key, manner. *KFOG's 'Live from the Archives 14'* CD sells 28,000 copies in 3 weeks, raising \$300k for food banks. KFOG delivers one of most educated audiences in the market, evidenced by Scarborough qualitative research and high duplication with the public station KQED. The station reaches a balanced audience that attracts both males (53%) and females (47%). Local, original, real.

Duplication: KLLC (20%), KSAN (19%), KCBS (13%)

Cume -8.8%

TSL +8.6%

FA '06 #3

WI '07 #2

SP '07 #1

SU '07 #4

3. KNBR/KTCT - 680 AM/ 1550 AM (Sport Talk) 3.5

Cumulus

KNBR/KTCT returns to the top #3 during this traditional 'dark' sports season with only one day a week of games. 49er Football games are carried KNBR/KTCT as well as on the FM band by sister station KSAN. KNBR/KTCT enjoys the highest fall ratings in 5 years. Strong coach and player shows generate midweek momentum and Murph and Mac in AMD finally hit their stride. *The Sports Leader* carries Warrior's basketball starting in November; Giants baseball begins in March. The station skews 89% male.

Duplication: KCBS (25%), KGO (19%), KSAN (15%), KFOG (13%)

Cume +8.3%

TSL +5.1%

FA '06 #3

WI '07 #6

SP '07 #3

SU '07 #6

4. KGO – 810 AM (Talk) 3.3 Citadel

KGO slips to #4, after a robust summer performance, but retains the #1 title for P12+. An interesting news period provides opportunities for discussion including: presidential primaries, sub prime crises and potential impact on the greater economy. Two longtime hosts depart – Pete Wilson and Bernie Ward. 66% of the audience is over 55 and 85% of the audience is over the age of 45.

Duplication: KCBS (24%), KNBR/TCT (19%), KSFO (16%)

Cume -9.2% TSL -13.1%

FA '06 #5 WI '07 #4 SP '07 #6 SU '07 #2

5. KIOI – 101.3 FM (Hot Adult Contemporary) 3.2 Clear Channel

KIOI climbs to #5 in one of the best showings in nearly a year. In AMD, marquee talent *Don Bleu* slips to #7, but MID ranks #5 and PMD ranks #6. *STAR* continues their aggressive billboard campaign throughout the Bay Area using everyday listeners as the visual focus. The station skews 65% female.

Duplication: KOIT (25%), KLLC (21%), KCBS (15%), KISQ (14%)

Cume -1.3% TSL -.6%

FA '06 #7 WI '07 #3 SP '07 #11 SU '07 #7t

6. KSAN – 107.7 FM (Rock) 3.0 Cumulus

KSAN completes the top tier at #6 and delivers 'males under 40' into the mix. The Bone is the official home of 49er football on the FM band. The station remains the only true rock station in the 9 Bay Area counties and consistently delivers A25-54 during prime time. AMD team Lamont and Tonelli celebrate their (18) year anniversary and continue to be a dominant factor across all male demographics. KSAN skews 72% male.

Duplication: KFOG (23%), KITS (23%), KLLC (16%)

Cume +20.5% TSL -4.6%

FA '06 #9 WI '07 #10 SP '07 #4 SU '07 #10

7. KMEL – 106.1 FM (Rhythmic Contemporary Hit Radio) 2.9 Clear Channel

KMEL remains flat from SU at #7 for this book. *The People's Station* is the Bay Area's original hip hop property with diverse demographic appeal. It ranks at the top for both young as well as adult demographic cells. 55% of the audience is currently under 24 years of age.

Duplication: KYLD (46%), KISQ (27%), KBLX (23%)

Cume -.7% TSL -11.9%

FA '06 #11 WI '07 #9 SP '07 #5 SU '07 #7

8t. KISQ – 98.1 FM (Rhythmic Adult Contemporary) 2.6 Clear Channel

KISQ slips into a three-way tie for #8 in the crowded rhythmic arena. Both Cume and TSL listening take a hit. Longtime AMD host *Rene* slips to #12 in spite of a loyal following. *KISS* skews 56% female.

Duplication: KMEL (24%), KOIT (24%), KBLX (24%), KYLD (20%)

Cume -5.3% TSL -23.9%

FA '06 #6 WI '07 #5 SP '07 #10 SU '06 #5

8t. KCBS – 740 AM (News) 2.6 CBS

KCBS lands in a three-way tie for #8. The all-news format is built around AMD where KCBS ranks #1 versus #15 during the rest of the day. KCBS continues to grow older with 63% of the audience over 55 years of age and 81% of the audience over 45 years of age. TSL continues to be short with 3:42 (hours:minutes) of listening to the station in a typically week, the shortest of any property in the top 20.

Duplication: KGO (20%), KNBR/KTCT (20%), KOIT (17%)

Cume +5.9% TSL +15.7%

FA '06 #8 WI '07 #11 SP '07 #9 SU '07 #14

8t. KBLX – 102.9 FM (Urban Adult Contemporary) 2.6 Inner City

KBLX slips to #8 within a fragmented female marketplace. *The Quiet Storm* is well positioned with a strong heritage and a passionate following. The station continues to dominate in many dayparts, but is a stand out with EVE and WKND listening. KBLX skews 69% female.

Duplication: KISQ (39%), KMEL (35%), KKSF (27%)

Cume -24.9% TSL -16.6%

FA '06 #3t WI '07 #8 SP '07 #8 SU '07 #3

11. KDFC – 102.1 FM (Classical) 2.3 Entercom

KDFC jumps to #11 in this seasonally driven format. The station enjoys partnerships with local arts organizations and is the official home of the San Francisco Symphony broadcasts. More recently, they began broadcasting the San Francisco Opera. 68% of the audience is over 55 years of age and 82% of the audience is over 45.

Duplication: KFOG (18%), KCBS (17%), KOIT (14%)

Cume +10.4% TSL -10.6%

FA '06 #15t WI '07 #17 SP '07 #14 SU '07 #11

12t. KLLC – 97.3 FM (Modern Adult Contemporary) 2.0 CBS

KLLC struggles to hold onto #12 after and a 15% drop in Cume. The PD, Chris Mays announces her departure on 1-17-08. Even the AMD team of *Sarah and No Name* slips to #9. Big duplication percentages are evident with a number of stations. *Alice* skews 70% female.

Duplication: KIOI (28%), KFOG (26%), KITS (24%)

Cume -14.9% TSL +7.3%

FA '06 #13 WI '07 #14t SP '07 #7 SU '06 #12

12t. KKSF – 103.7 FM (Smooth Jazz) 2.0 Clear Channel

KKSF slips into a tie for #12 after a promising SU performance. The almost entirely syndicated line-up, sans Miranda Wilson in MID, limits station flexibility and the unique local flavor it originally enjoyed. 83% of the audience is over 45 years of age.

Duplication: KBLX (25%), KOIT (23%), KISQ (21%)

Cume -22.3% TSL -10.6%

FA '06 #10 WI '07 #6t SP '07 #13 SU '06 #9

14. KBWF – 95.7 FM (Country) 1.9 Entercom

KBWF now approaches its first full year in the format at #14. The CHR presentation has changed and the energized delivery has slowed as the station has evolved. The mid thirties target has given way to a mid forties listener and the female skew has become male (53%). The San Francisco market has yet to prove it can sustain a country format while KRTY in San Jose remains viable.

Duplication: KIOI (21%), KSAN (20%), KOIT (17%)

Cume +22.3% TSL -20%

FA '06 n/a WI '07 #13 SP '07 11t SU '07 #16

15t. KITS – 105.3 FM (Alternative Rock) 1.8 CBS

KITS is in a tie for #15 after losing Howard Stern two years ago. *The Woody Show* replacement is a talk intensive program that appeals to a young audience and has been renewed for 2008. In the EVE the station airs the popular syndicated program Loveline. The station skews 72% male.

Duplication: KSAN (30%), KLLC (28%), KIOI (21%)

Cume -.8% TSL -12%

FA '06 #18 WI '07 #16 SP '07 #16 SU '07 #13

15t. KSFO – 560 AM (Conservative Talk) 1.8

Citadel

KSFO is in a tie for #15, but looks strong P55+. The syndicated line-up includes the controversial Rush Limbaugh, Sean Hannity and Dr. Laura. KSFO is the home of Raiders football. The station is 71% 55+ and 90% 45+.

Duplication: KGO (33%), KNEW (24%), KCBS (23%), KNBR/KTCT (21%)

Cume +12.9% TSL +6.8%

FA '06 #12 WI '07 #12 SP '07 #18 SU '06 #18

17. KMVQ – 99.7 FM (Rhythmic Adult Contemporary) 1.7

CBS

KMVQ holds onto the #17 spot. The *Mov'n* cume stalls, but time spent listening increases in this crowded format arena. The station skews 55% female

Duplication: KYLD (31%), KISQ (28%), KIOI (26%), KMEL (24%), KOIT (22%)

Cume -17.4% TSL +18.7%

FA '06 #19 WI '07 #19 SP '07 #15 SU '07 #17

18. KYLD – 94.9 FM (Rhythmic Contemporary Hit Radio) 1.5

Clear Channel

KYLD drops to #18 but is #1 with P12-17. 67% of the station is under 24 years of age and currently skews male 53%.

Duplication: KMEL (49%), KISQ (23%), KMVQ (22%), KIOI (18%)

Cume +7.3% TSL -26.3%

FA '06 #15 WI '07 #14 SP '06 #17 SU '06 #15

19t. KNEW – 960 AM (Conservative Talk) 1.1

Clear Channel

KNEW is tied for #19 and is the second conservative outlet in San Francisco. The syndicated line up includes: Armstrong & Getty in AMD, Dennis Miller in early MID, Bill O'Reilly in late MID, and Michael Savage in PMD. 73% of the station is over 45 years of age and skews 82% male.

Duplication: KSFO (40%), KCBS (25%), KGO (25%)

Cume +25.5% TSL +21.7%

FA '06 #17 WI '07 #20 SP '07 #19 SU '06 #21

19t. KNGY – 92.7 FM (Dance) 1.1

Flying Bear

KNGY is tied for #19. 45% of the audience resides in San Francisco County due to signal limitations. Fernando and Greg in AMD lead the station in popularity. 54% of the station skews male.

Duplication: KOIT (24%), KMVQ (23%), KIOI (22%)

Cume +21.3% TSL -15.9%

FA '06 #21 WI '07 #21 SP '07 #20 SU '07 #20

21. KKGN – 960 AM (Liberal Talk/Green) 1.0

Clear Channel

KKGN enters at #21 after changing call letters. *Green 960* is anchored by a 'recycled' mix of network radio personalities, many formerly of KQKE and AirAmerica. The station is positioned as trying to contain a green 'plug' in every show.

Duplication: KGO (30%), KCBS (19%), KNBR (17%)

Cume n/a TSL n/a

FA '06 n/a WI '07 n/a SP '07 n/a SU '07 n/a

22. KFRC – 106.9 FM (Classic Hits) .8

CBS

KFRC is #22 after relaunching on 5/17/07 at a new dial position. They have rehired some of the old crew "The Duke", Sue Hall etc. KFRC is the radio home of Oakland A's baseball. 70% of the audience is 45+ and the station currently skews 56% male.

Duplication: KSAN (27%), KFOG (26%)

Cume +21.3% TSL -15.9%

FA '06 n/a

WI '07 n/a

SP '07 n/a

SU '07 #19

Source: KFOG/Fall 2007 Arbitron, M-Su 6AM-12AM, Adults 25-54, AQH Share, Metro, General Market, Commercial, San Francisco radio stations.