Superior data wrapped in an engaging experience
Women 15-54
AC & CHR
N = 2,057
June 7-15, 2010
AC Cume - 1,509

CHR Cume - 1,429
Total Sample % by Region

<table>
<thead>
<tr>
<th>Region</th>
<th>Sample Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Southeast</td>
<td>21.0%</td>
</tr>
<tr>
<td>Northeast</td>
<td>20.5%</td>
</tr>
<tr>
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<td>18.8%</td>
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</table>
Regions & Cities

Southwest Region
- Dallas
- Denver
- Phoenix
- Las Vegas
- Houston

Midwest Region
- Chicago
- Kansas City
- Minneapolis
- St. Louis
- Cleveland

Southeast Region
- Atlanta
- Charlotte
- Nashville
- Orlando
- Tampa

West Coast Region
- Los Angeles
- San Francisco
- Seattle

Northeast Region:
- Boston
- New York
Purpose
Why This Study?

- Develop proprietary information for our clients
- Develop information for the benefit of the industry
What We Studied
Attitudes and Usage of Radio and New Media

- How are women using radio
- How is that usage changing
- What’s causing erosion in listening
- How can radio combat that...what are our strengths
- What would make radio more enjoyable
- How are women using online music and social media
- How is that affecting radio usage and attitudes
- How are radio’s online efforts faring
- Can cell phone radio receivers help radio
- Can cell phone radio receivers help cell phone makers
- How do all those answers vary by format and demo
What do fans of Mainstream CHR, Rhythmic CHR, Hot AC, and Mainstream AC...

... want musically

... want from a morning show

... want online

... want to win

... care about most in their lives

... want you to put on your Facebook page
And...

- Who are the hottest and not-so-hot artists in those formats?
- What’s happening with at-work listening
- Do teases and appointments work
- Are likely PPM or Diary-Keepers different, and how
- What do the “Heavy/Deep” listeners to CHR and AC want
- Who are the…
  - Early adoptors
  - Opinion leaders
  … and what do they want
695 Data Points

152 Demos

105,640 Discrete Pieces of Data
Today’s Topic
Total Sample Headlines

CHR Deep Dive
July 22 - 2:00 pm EST

AC Deep Dive
July 29 - 2:00 pm EST

At-Work Listening
August 5 - 2:00 pm EST
Heavy Listeners Defined

- 3 or More Hours: 18.3%
- 1 - 3 Hours: 58.3%
- Less than 1 Hour: 23.4%
Listening More or Less vs. 3-5 Years Ago

- More: 25.2%
- About the Same: 45.6%
- Less: 28.0%
## Why Listening Less?

### 15 - 29 Years Old

<table>
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<th>Reason</th>
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A Station That Really Understands Me

“Radio Gets Me” + 6.4%

“Radio Doesn’t Get Me” -20.4%

Radio Listening
“One day, I won’t need/want to listen to music on the radio because I can get it online / on my cell phone / on a digital music player.”
“One day I won’t need...radio.”
Disappointed if I couldn’t listen to FM Radio

- 45 - 54: 78.1%
- 35 - 44: 75.6%
- 25 - 34: 74.8%
- 15 - 24: 74.1%

Strongly Agree
Radio’s Biggest Issues
Digital Media
- occupying time at home
- also being used out of home

Change in commuting behavior

Too many commercials

Not always relevant enough
Radio’s Strengths
What Do You Like Most About Listening to Radio?

1. It's free: 49.4%
2. It's easy: 34.3%
3. Some of the people are entertaining: 31.7%
4. Find out what music is popular: 29.1%
5. Keeps me company: 24.3%
6. Always a station that matches my mood: 23.0%
7. Keeps me informed: 23.0%
8. Can listen wherever: 22.8%
9. Find out what's going on: 19.5%
10. Always able to find my favorite song: 14.1%
11. So many choices to choose from: 13.5%
12. Like not knowing what's next: 12.5%

% Total Respondents
<table>
<thead>
<tr>
<th>Feature</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
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<td>49.4%</td>
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<td>12.5%</td>
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</table>
Convenience, Companionship, and Community

- It's free: 49.4%
- It's easy: 34.3%
- Can listen wherever: 22.8%
- Some of the people are entertaining: 31.7%
- Keeps me company: 24.3%
- Always a station that matches my mood: 23.0%
- Some of the people are entertaining: 31.7%
- Find out what music is popular: 29.1%
- Find out what's going on: 19.5%
What would make radio listening more enjoyable?

<table>
<thead>
<tr>
<th>Analysis</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fewer commercials</td>
<td>67.4%</td>
</tr>
<tr>
<td>Fewer obnoxious commercials</td>
<td>58.7%</td>
</tr>
<tr>
<td>More new music (leans young)</td>
<td>40.4%</td>
</tr>
<tr>
<td>More info about the songs and artists</td>
<td>37.9%</td>
</tr>
<tr>
<td>Less music I’m tired of</td>
<td>36.4%</td>
</tr>
</tbody>
</table>
What would make radio listening more enjoyable?

<table>
<thead>
<tr>
<th>People Using Radio Less Lately:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Fewer commercials</td>
<td>69.2%</td>
</tr>
<tr>
<td>Fewer obnoxious commercials</td>
<td>60.5%</td>
</tr>
<tr>
<td><em>Less useless DJ chatter</em></td>
<td>38%</td>
</tr>
<tr>
<td>Less music I’m tired of</td>
<td>35.5%</td>
</tr>
<tr>
<td>More info. about the songs and artists</td>
<td>35%</td>
</tr>
<tr>
<td>More new music</td>
<td>35%</td>
</tr>
</tbody>
</table>
# 2 thing Heavy Users like about Radio:
- some of the people are entertaining

# 3 reason people give for Using Less Radio:
- useless DJ chatter
General Attitude Toward Music

Radio Air Talent

- Like Them: 50%
- Take or Leave Them: 36%
- Dislike Them: 14%
HD Radio’s Potential

“Have a Clearer Digital Signal”

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heavy Radio Users</td>
<td>24%</td>
<td>#8</td>
</tr>
<tr>
<td>Using Less Radio</td>
<td>21.8%</td>
<td>#9</td>
</tr>
</tbody>
</table>
Radio and New Media
Listening to Music on Digital Devices
Weekly Listening to iPods, etc.

<table>
<thead>
<tr>
<th>Age Group</th>
<th>None</th>
<th>5+ Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>35-54</td>
<td>9.4%</td>
<td>42.6%</td>
</tr>
<tr>
<td>25-34</td>
<td>12.7%</td>
<td>29.7%</td>
</tr>
<tr>
<td>15-24</td>
<td>14.9%</td>
<td>25.5%</td>
</tr>
</tbody>
</table>
Listening to Music Online
How much time is spent listening to internet (non-radio) music streams
Weekly Time Spent Listening to Music (non-radio) Streamed on the Internet

- None: 48.5%
- 1-3 hrs: 37.5%
- 3-5 hrs: 8.5%
- 5+ hrs: 5.6%

% of Total
Weekly Time Spent Listening to Music (non-radio) Streamed on the Internet

<table>
<thead>
<tr>
<th>Time Per Week</th>
<th>% of Total</th>
<th>Early Adopters</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>48.5%</td>
<td>27.0%</td>
</tr>
<tr>
<td>1-3 hrs</td>
<td>37.5%</td>
<td>47.6%</td>
</tr>
<tr>
<td>3-5 hrs</td>
<td>8.5%</td>
<td>15.1%</td>
</tr>
<tr>
<td>5+ hrs</td>
<td>5.6%</td>
<td>10.3%</td>
</tr>
</tbody>
</table>
Likelihood of Listening to Internet Streams in Near Future

Very Likely to Start Listening to Streams: 44.7%

Probably Won’t: 55.3%
<table>
<thead>
<tr>
<th>Status</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Streaming Now</td>
<td>44%</td>
</tr>
<tr>
<td>Likely to Start Soon</td>
<td>45%</td>
</tr>
<tr>
<td>Additional Streamers</td>
<td>20%</td>
</tr>
<tr>
<td>Already Streaming</td>
<td>56%</td>
</tr>
<tr>
<td><strong>Within a Year or Two</strong></td>
<td><strong>76%</strong></td>
</tr>
</tbody>
</table>
Heavy radio users are more likely than the average listener to:

• Own and use a digital music player
• Listen to online music streams
• Have a social media profile (Facebook or MySpace)
• Watch online videos
And Vice-Versa

<table>
<thead>
<tr>
<th>Total Sample</th>
<th>% Heaviest Radio Listeners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heavy iPod Users</td>
<td>23%</td>
</tr>
<tr>
<td>Heavy Streamers</td>
<td>30%</td>
</tr>
<tr>
<td>Total Sample</td>
<td>18%</td>
</tr>
</tbody>
</table>
Why Don’t You Listen to More Online Streaming?

- Don't remember to do it often: 36.3%
- Just don't have time: 31.0%
- Not portable - can't carry it around: 25.6%
- I would if stream was in my car: 20.0%
- On-air stations are more fun: 19.2%
- Can't listen at work: 15.4%
Music Purchase / Consumption

- Download*: 29.2%
- CD Purchase: 15.5%

* with or without purchase
New Music / New Artist Discovery

Total
15 - 24
Early Adoptor
Downloaders
CD Buyers
New Music Imp.

Radio
Internet
Friends
TV
Social Media
Social Media

- Have a Facebook profile: 75.8%
- Have MySpace profile: 34.5%
- Have an account with a customizable music streamer, like Pandora: 27.2%
- Have a Twitter account: 20.7%
Social Media and Radio Stations Online
Visited a radio station web site - past week 25.9%

Member of listener club (or email) 21.5%

Active member of points/rewards club 7.7%
Radio Online in Context

- Station Points Club: 7.7%
- Twitter Acct: 20.7%
- Station Listener Club: 21.5%
- Stn Site Past Week: 25.9%
- Pandora-like account: 27.2%
- MySpace Profile: 34.5%
- Facebook Profile: 75.8%
Just How Good are Station Web Sites?

- About Average: 61.3%
- More entertaining or useful than most: 23.2%
- Less entertaining or useful than most: 15.6%
Radio and Cell Phones
Cell Phones

Cell Phone Ownership: 94.5%
Cell and Landline: 61.5%
Cell Only: 33.0%
“I would spend more time listening to radio if my cell phone had a receiver in it.”

- Strongly Agree: 22.0%
- Somewhat Agree: 32.1%
- Total Agree: 54.1%
“I would be more likely to buy a specific model of cell phone if it had a radio receiver in it.”

- Total: 73.2%
- Somewhat agree: 32.7%, 32.6%
- Strongly agree: 14.0%

Total Agree
- Early Adopters: 40.6%
Summary & Conclusions

- Perceived listening among women is flat overall.

- Those who are listening less are doing so because of:
  - Digital Media
  - Commercials - Too Many/Too Bad
  - Change in Commuting Behavior
  - Radio (content) Less Relevant to Them

- Radio’s future is in jeopardy with young people.

- Wi-Fi in cars is also a major threat to radio usage.

- Better content addresses all of those problems.
What would make radio more enjoyable:
- Fewer, better commercials
- More information about songs and artists
- Find more ways to serve the huge conceptual appetite for new music
- Less useless DJ chatter

Radio’s strengths according to these women:
- Free
- Easy to use
- Entertaining people
- Ability to know what’s popular
- The 3 C’s... convenience, companionship, and community
Talk is a double-edged sword. Personalities are vital. Useless talk is a killer.

50/50 attitude toward personalities.

Total time spent with streamed music relatively low, but will grow.

Radio is still the dominant source for discovery of new music and artists.
Heavy radio users tend to be heavy digital consumers.

Radio station web sites are generally well regarded, but Facebook is much, much bigger.

Radio would enjoy a significant usage boost from having radio receivers in cell phones...and a significant number of consumers would be more likely to buy a cell phone that had a radio receiver in it.
More Data
For Clients

- Early Adopters
- Opinion Leaders
- PPM and/or Diary Keepers
For Everyone

- Music
- Morning Show
- Promotions & Marketing
- Other Media Behavior
- Lifestyle Issues

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For additional information, please visit

www.burnsradio.com

or call: (251) 980-7070