

Here She Comes - Insights Into Women, Radio, and New Media®





dmr

direct
marketing
results



Superior data wrapped in an engaging experience



Women 15-54

AC & CHR

N = 2,057

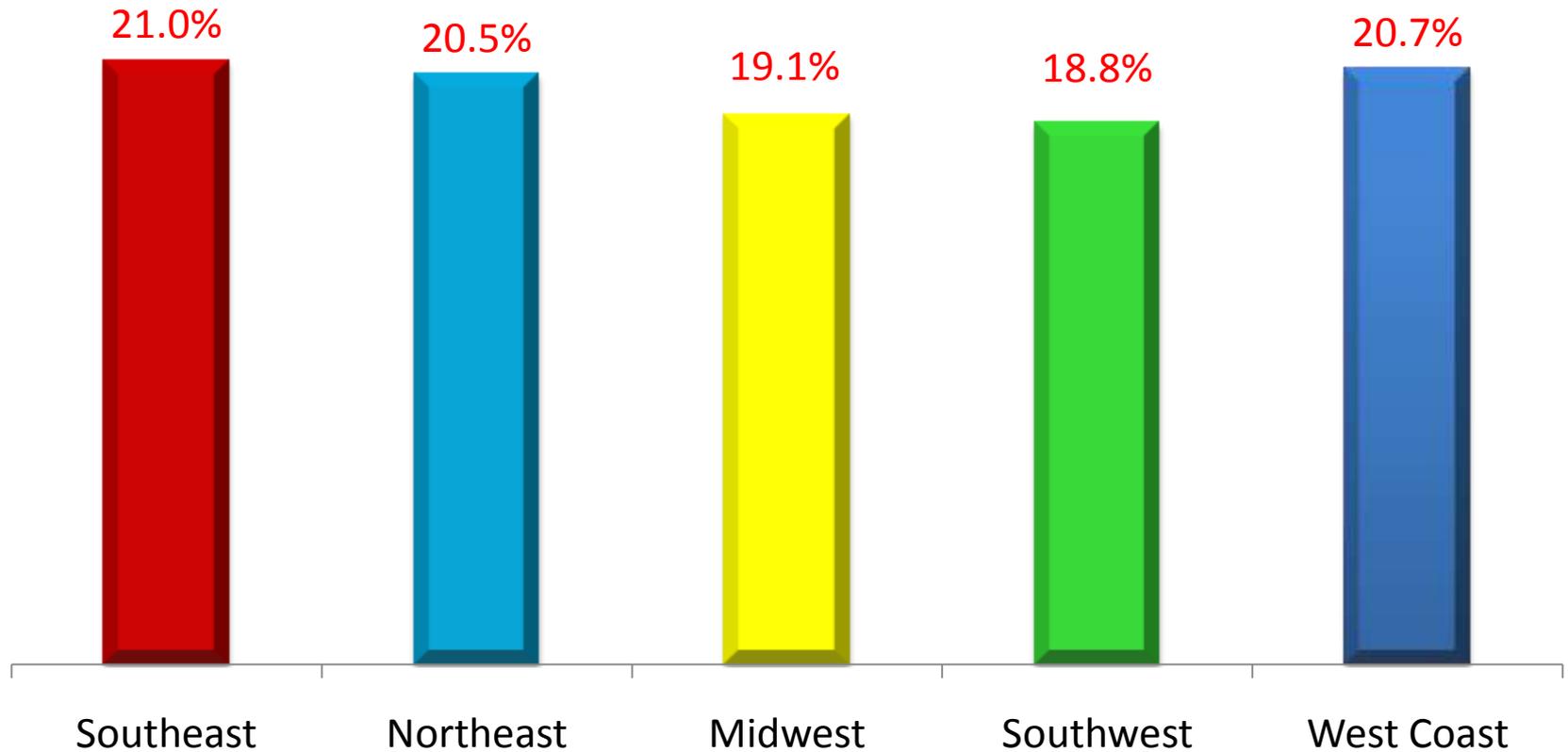
June 7-15, 2010

Cume

AC Cume - 1,509

CHR Cume - 1,429

Total Sample % by Region



Regions & Cities

Southwest Region

Dallas
Denver
Phoenix
Las Vegas
Houston

Southeast Region

Atlanta
Charlotte
Nashville
Orlando
Tampa

Midwest Region

Chicago
Kansas City
Minneapolis
St. Louis
Cleveland

Northeast Region:

Boston
New York

West Coast Region

Los Angeles
San Francisco
Seattle

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

And...

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

Data Points

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

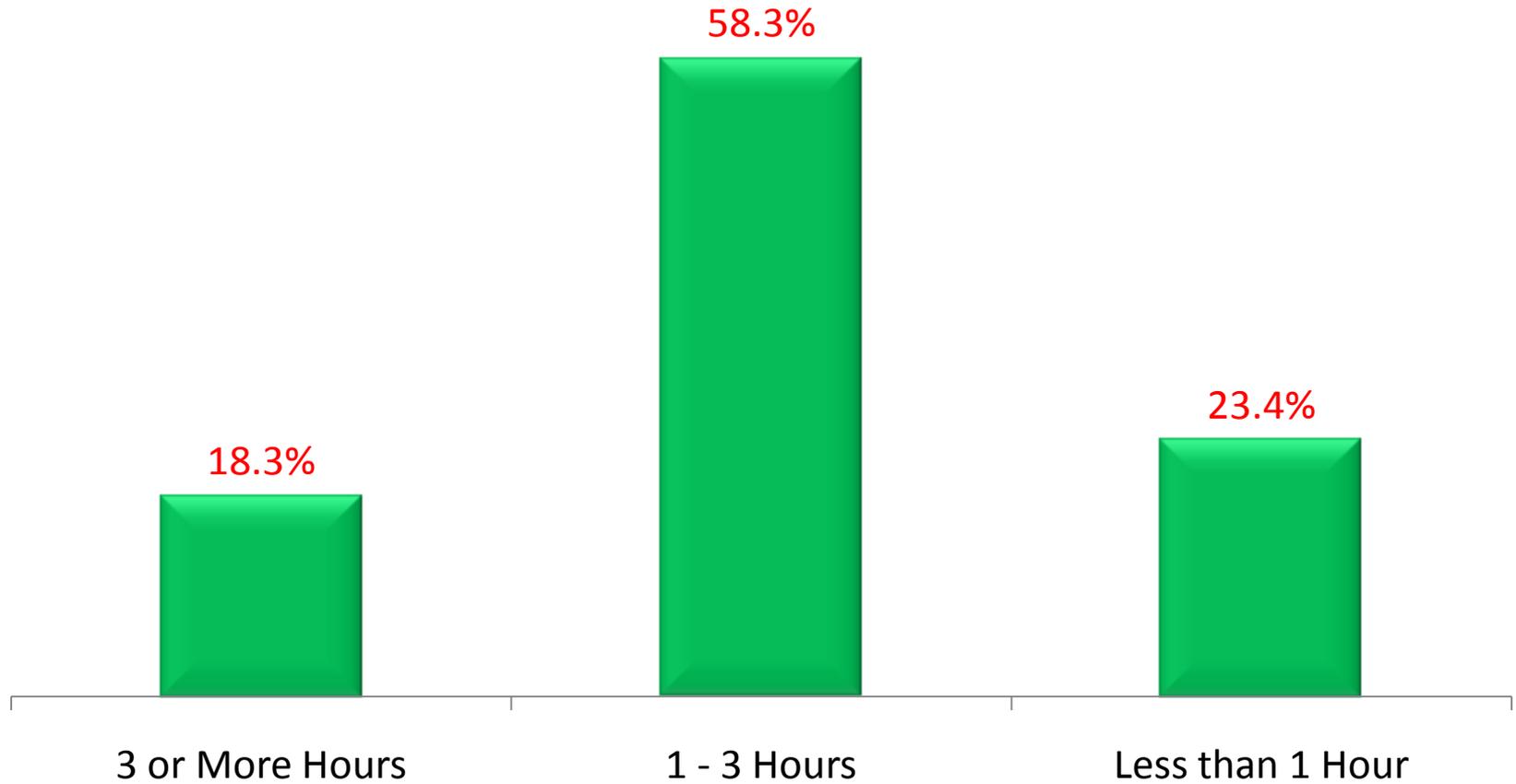
AC Deep Dive

July 29 - 2:00 pm EST

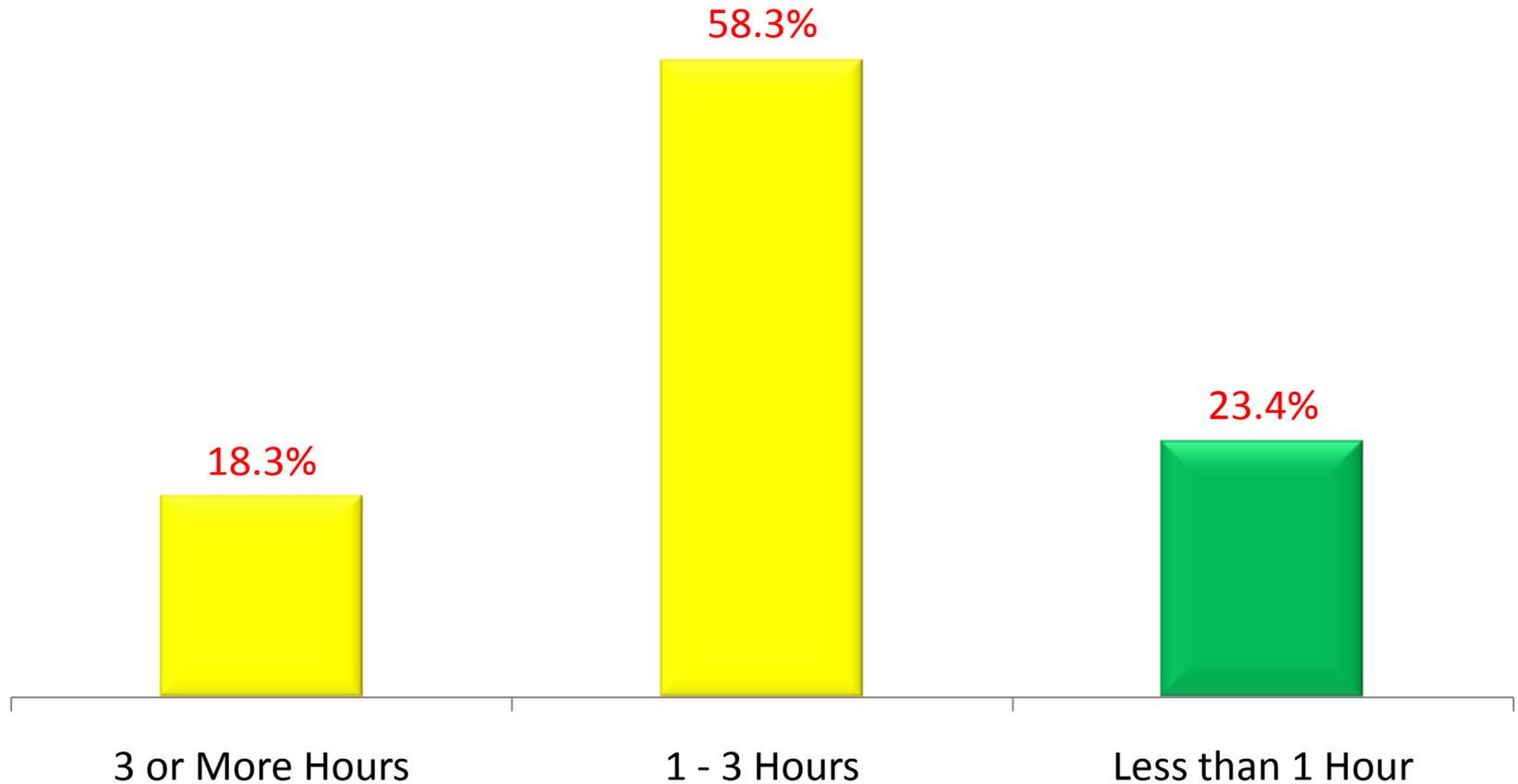
At-Work Listening

August 5 - 2:00 pm EST

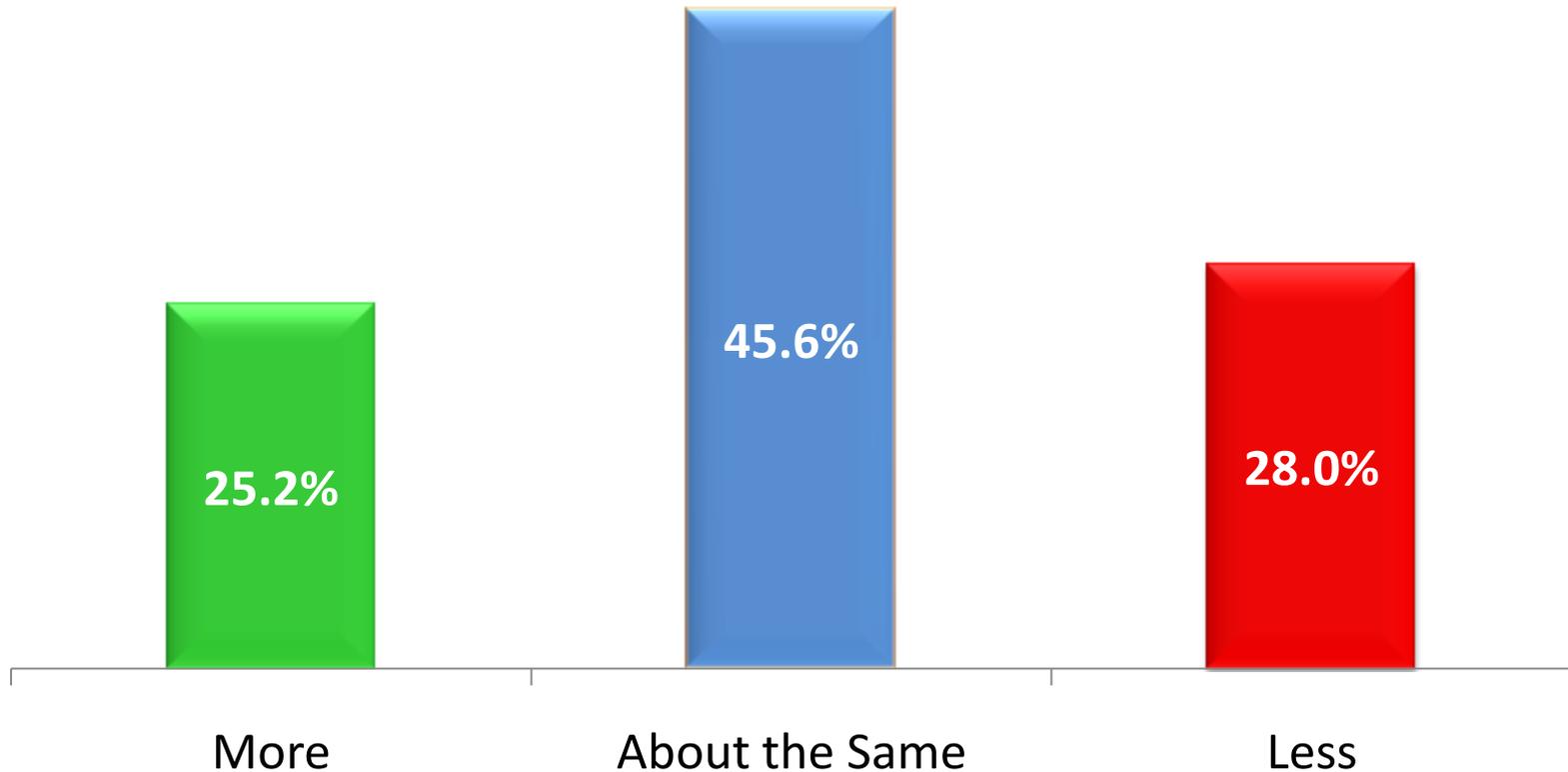
TSL to Radio - Daily



Heavy Listeners Defined



Listening More or Less



Listening More or Less vs. 3-5 Years Ago

Why Listening Less?

15 - 29 Years Old

iPod / digital device	52 %
Too many commercials	32 %
Too much repetition	32 %
Music on the internet	28 %
Used to listen at home	26 %

30 - 54 Years Old

Commute changed	41 %
More time on internet	30 %
iPod / digital device	25 %
Less relevant to my life	19 %
Used to listen at home	19 %
Too many commercials	19 %

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A Station That Really Understands Me

Radio Listening

“Radio Gets Me”

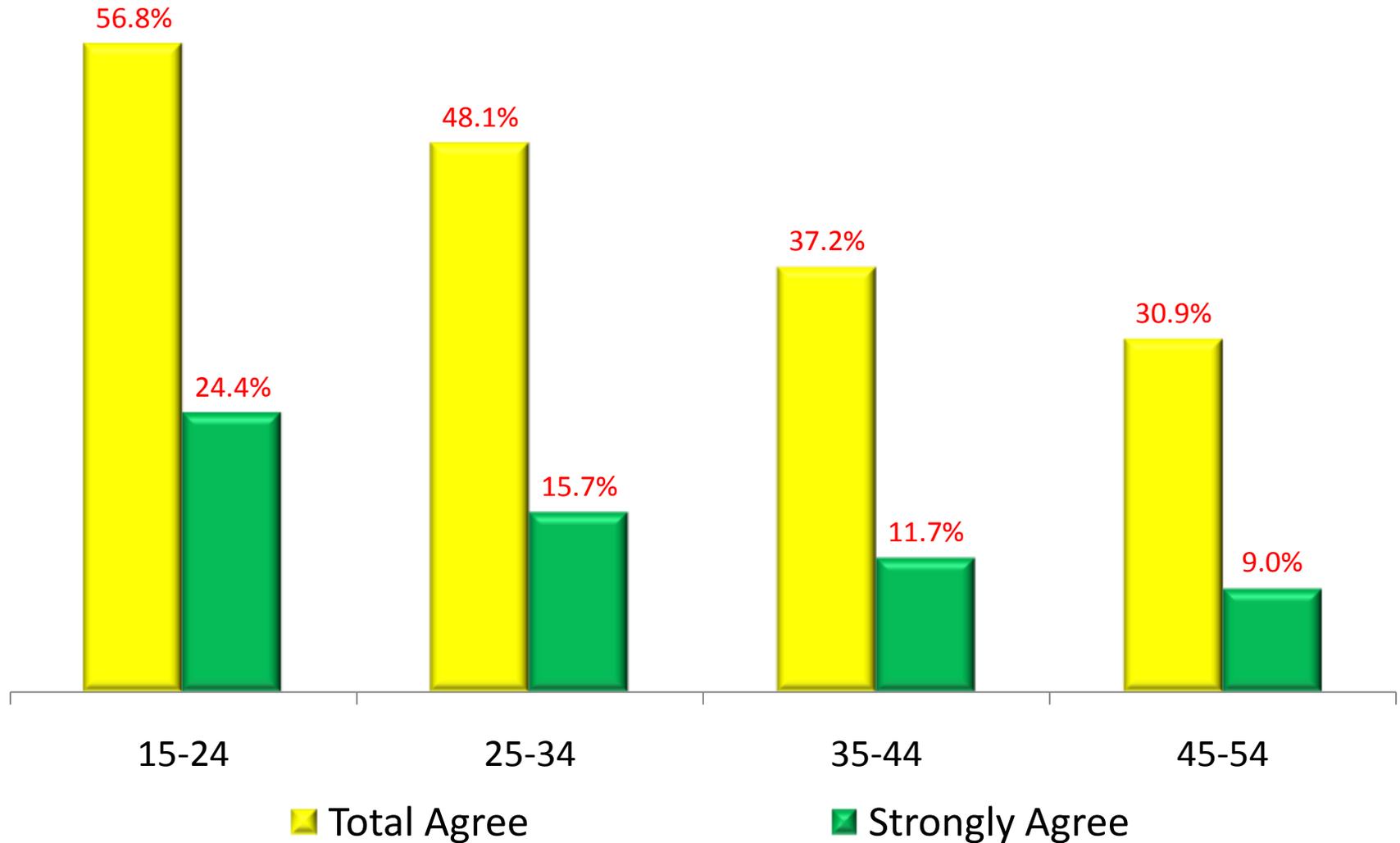
+ 6.4%

“Radio Doesn’t Get Me”

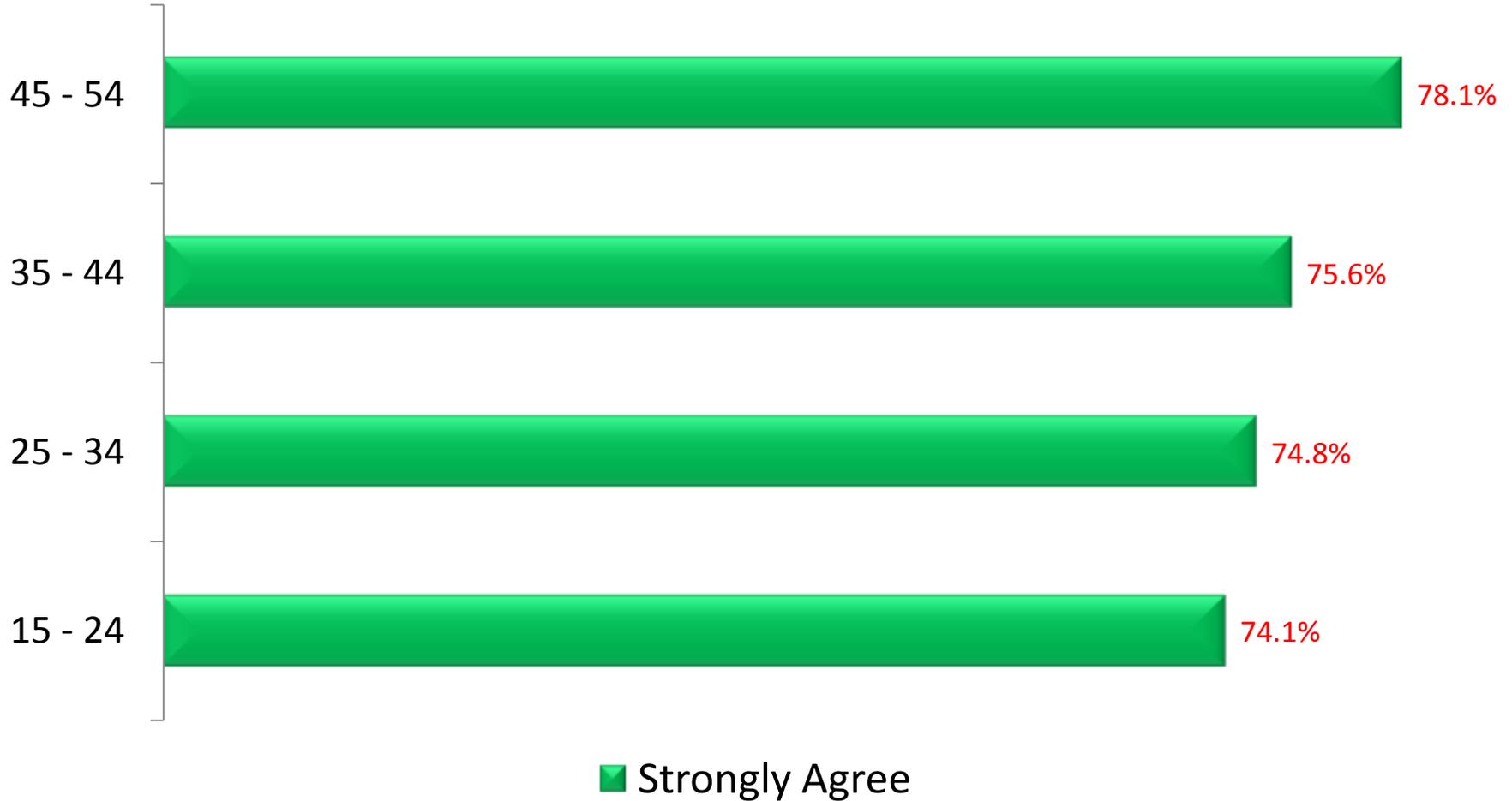
-20.4%

“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



Radio's Biggest Issues

Biggest issues...

Digital Media

- occupying time at home
- also being used out of home

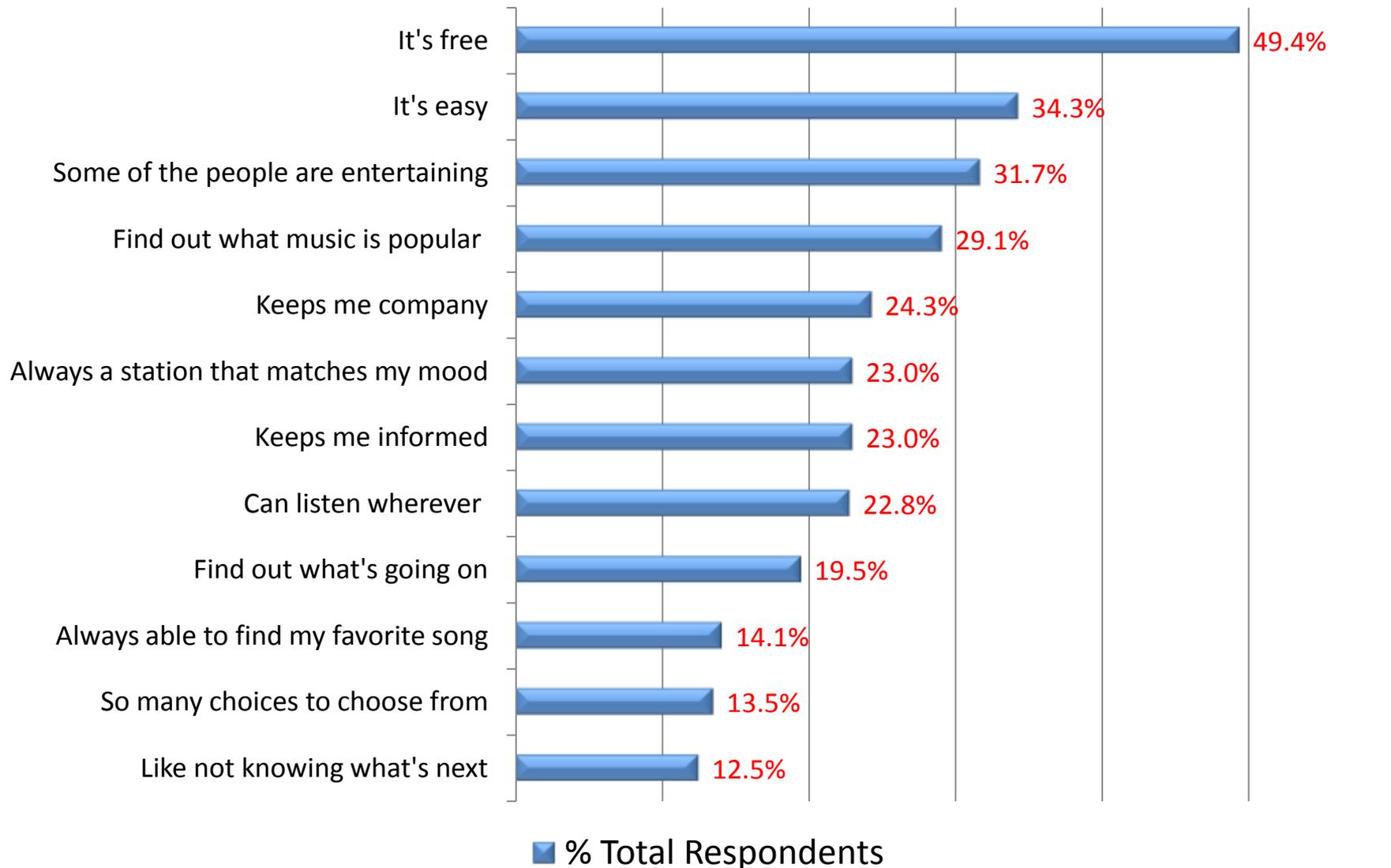
Change in commuting behavior

Too many commercials

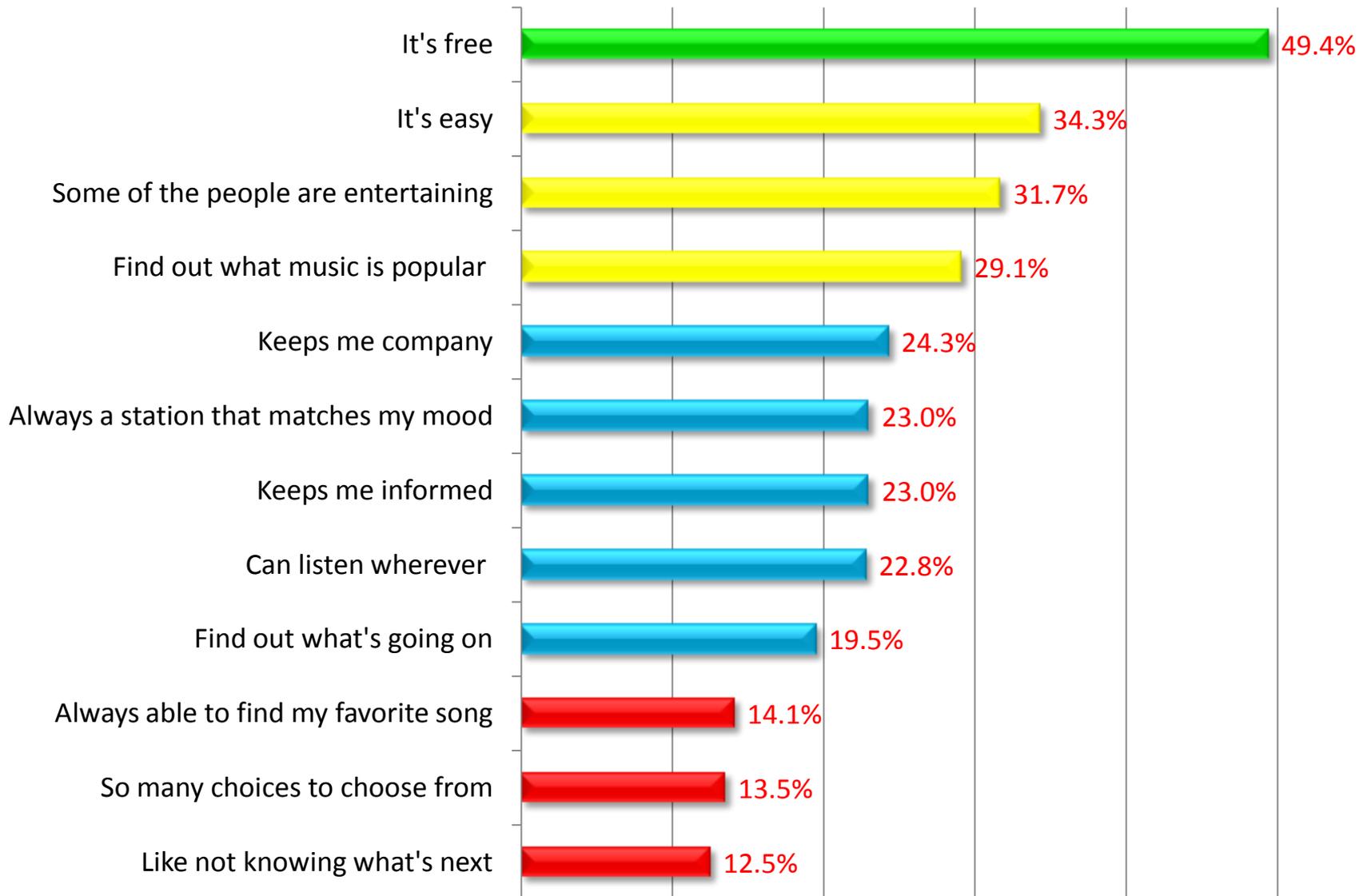
Not always relevant enough

Radio's Strengths

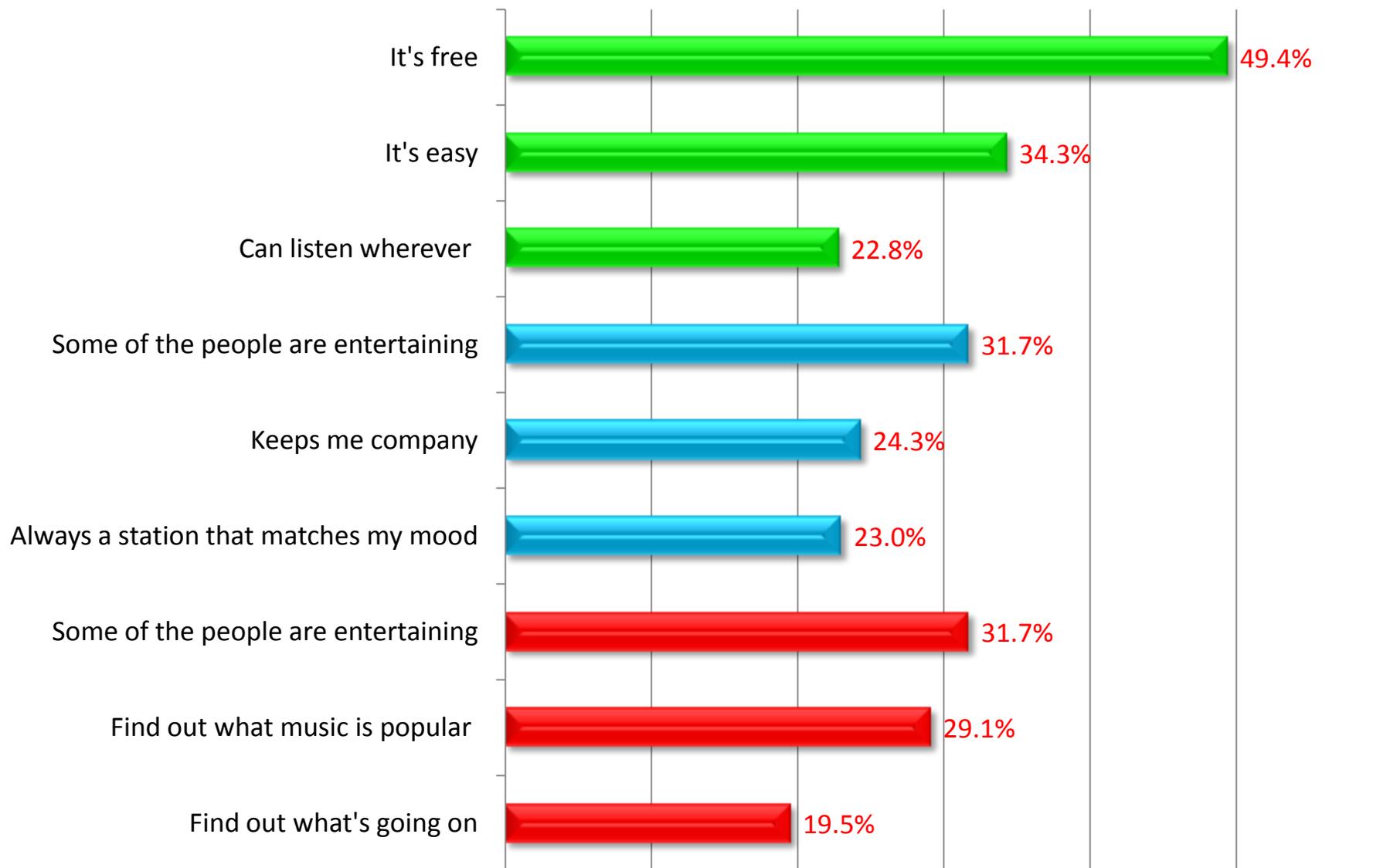
What Do You Like Most About Listening to Radio?



What Do You Like Most About Listening to Radio?



Convenience, Companionship, and Community



What would make radio listening more enjoyable?

Existing Heavy Radio Users:

Fewer commercials	67.4%
Fewer obnoxious commercials	58.7%
More new music (leans young)	40.4%
More info about the songs and artists	37.9%
Less music I'm tired of	36.4%

What would make radio listening more enjoyable?

People Using Radio Less Lately:

Fewer commercials	69.2%
Fewer obnoxious commercials	60.5%
<i>Less useless DJ chatter</i>	<i>38%</i>
Less music I'm tired of	35.5%
More info. about the songs and artists	35%
More new music	35%

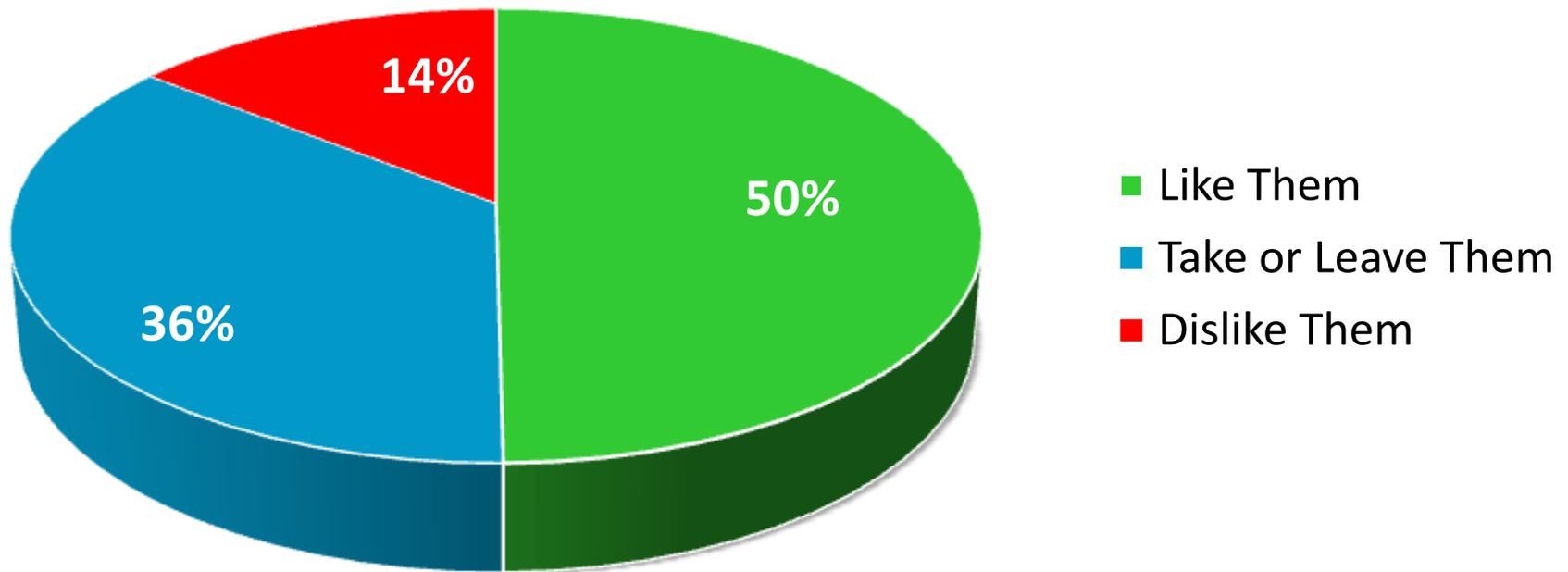
2 thing Heavy Users like about Radio:

- some of the people are entertaining

3 reason people give for Using Less Radio:

- useless DJ chatter

General Attitude Toward Music Radio Air Talent



HD Radio's Potential

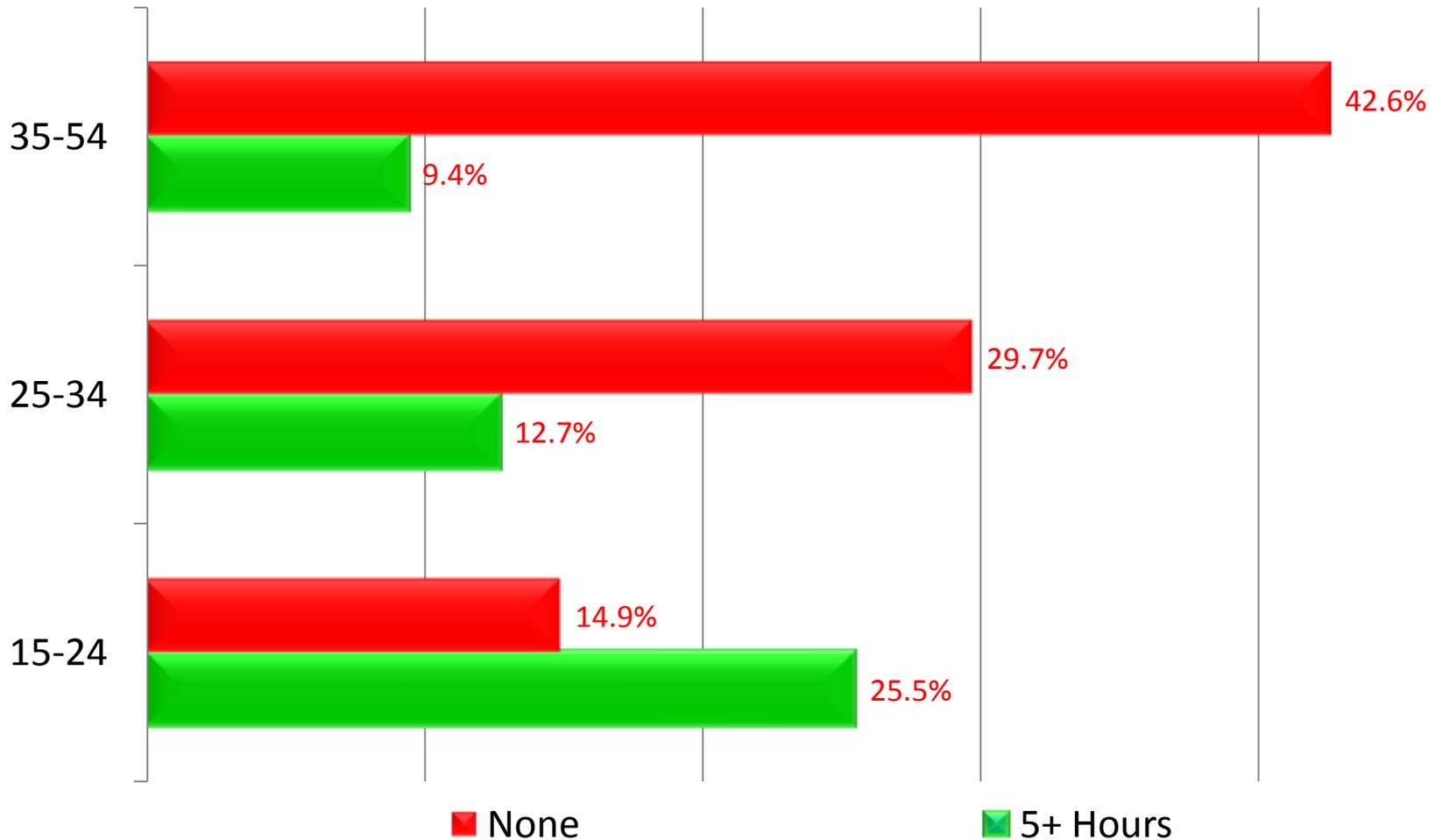
“Have a Clearer Digital Signal”

Heavy Radio Users	24%	# 8
Using Less Radio	21.8%	# 9

Radio and New Media

Listening to Music on Digital Devices

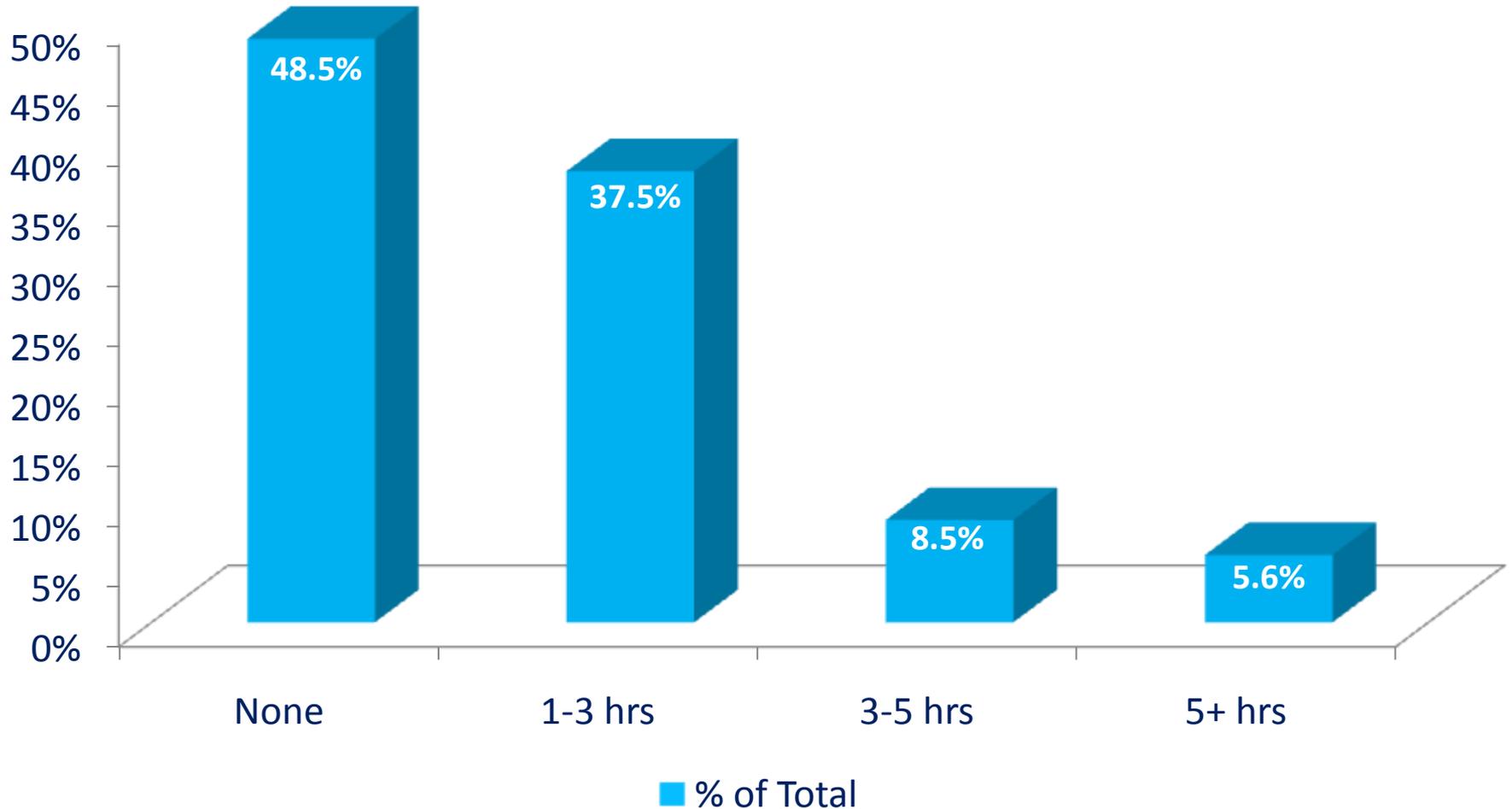
Weekly Listening to iPods, etc.



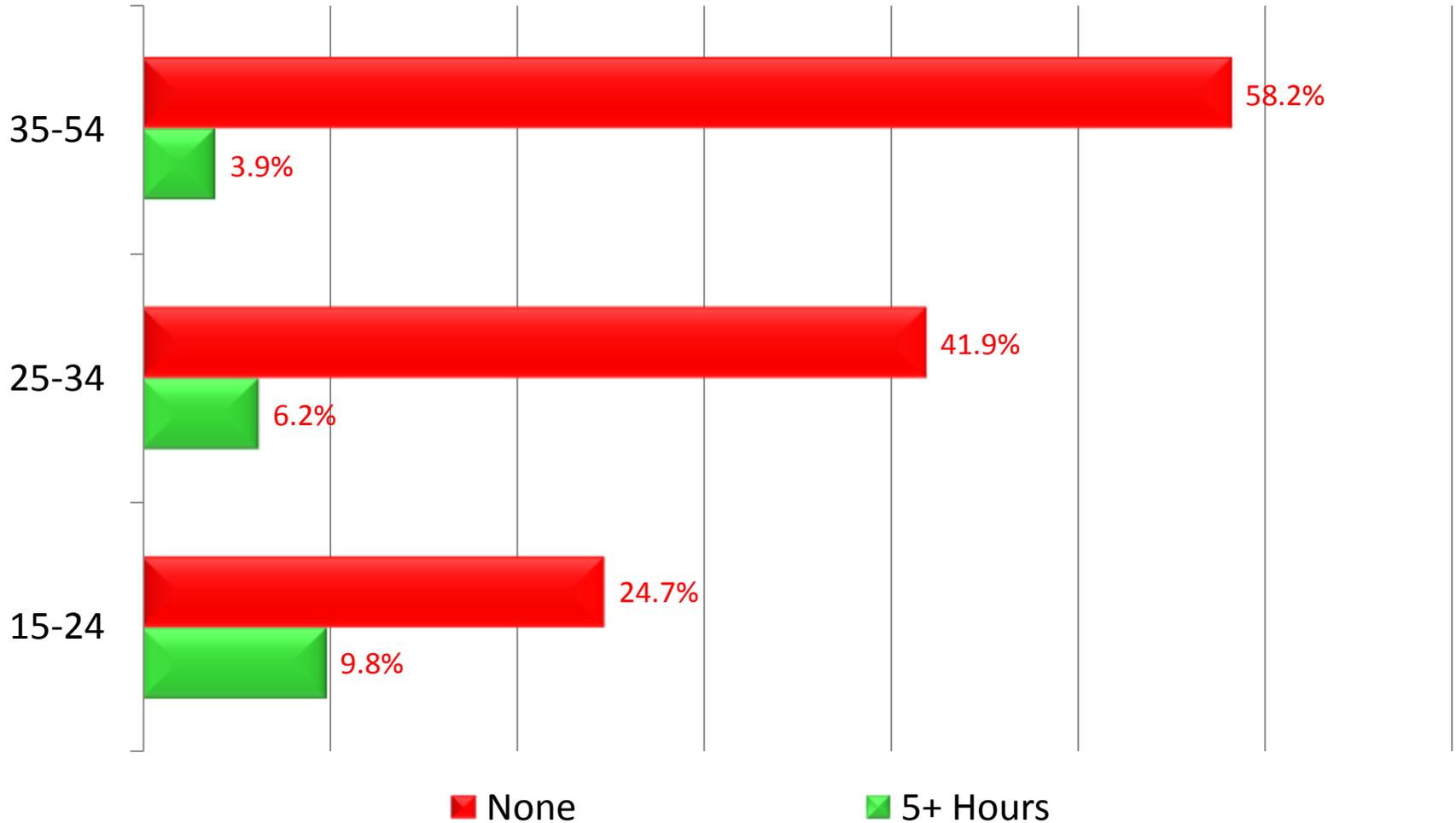
Listening to Music Online

How much time is spent listening to internet (non-radio) music streams

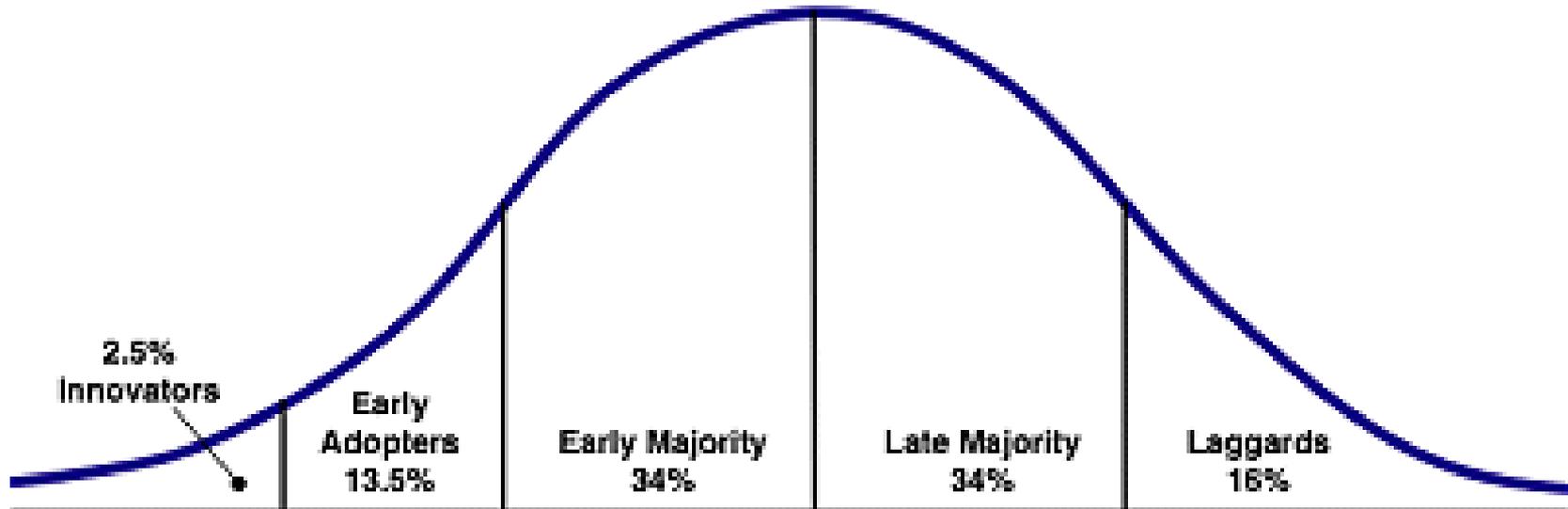
Weekly Time Spent Listening to Music (non-radio) Streamed on the Internet



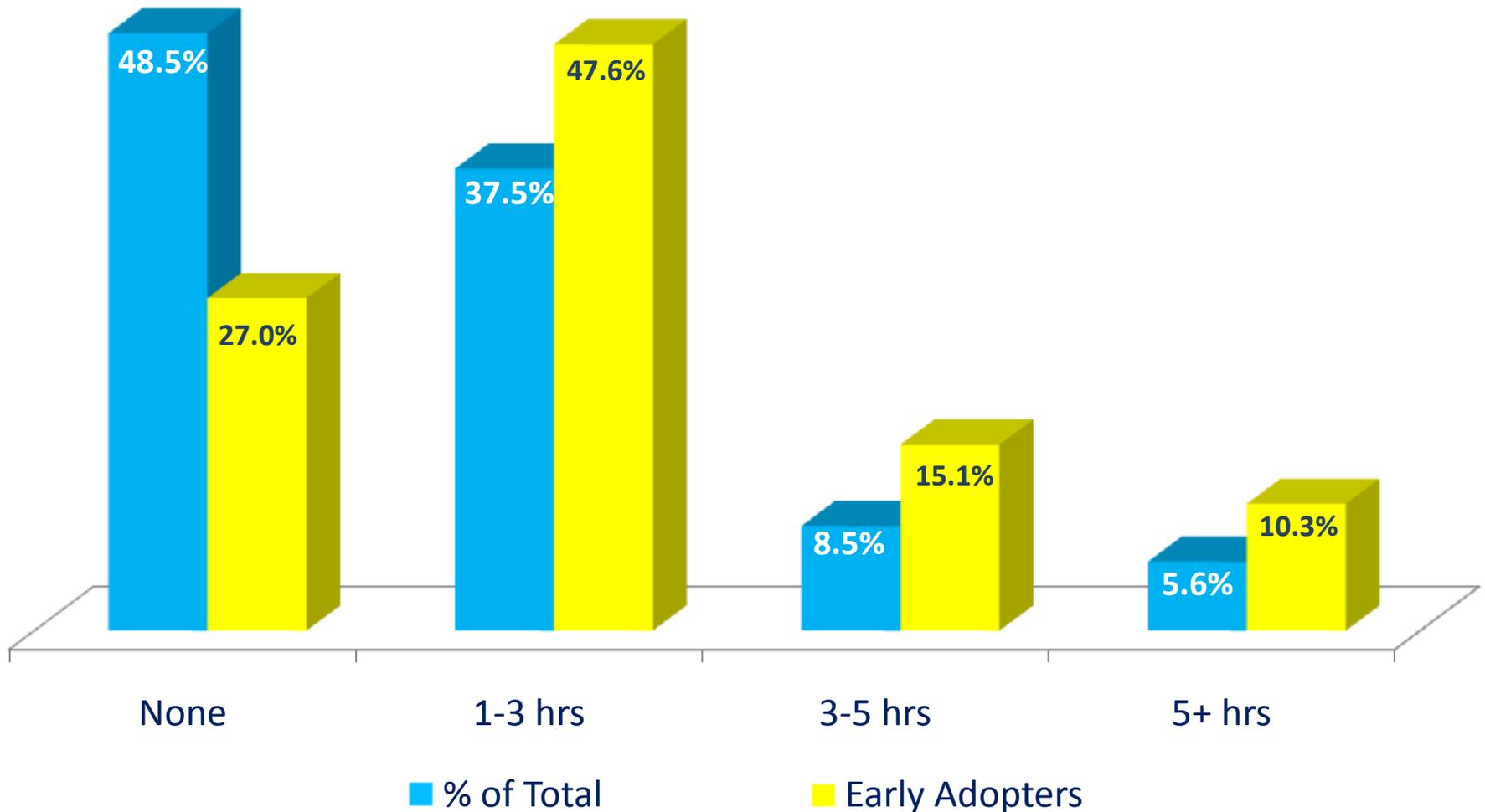
Weekly Time to Internet Streams



Early Adopters



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



Likelihood of Listening to Internet Streams in Near Future

Very Likely to Start
Listening to Streams

44.7 %



Probably Won't

55.3 %





	Not Streaming Now	44%
X	Likely to Start Soon	45%
<hr/>		
	Additional Streamers	20%
+	Already Streaming	56%
<hr/>		
	Within a Year or Two	76%

Heavy Radio Users are Already Heavy Digital Consumers

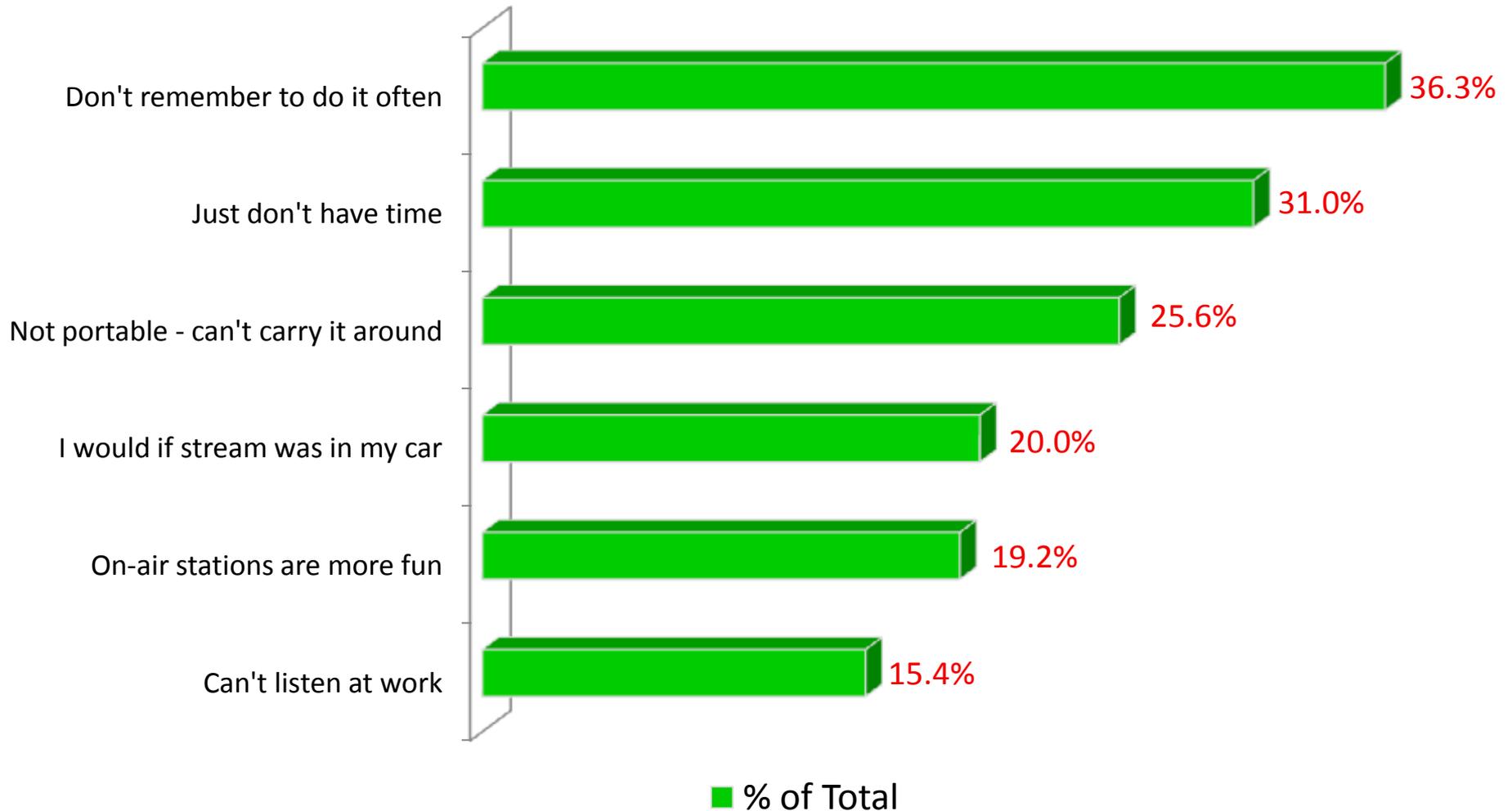
***Heavy radio users are more likely
than the average listener to:***

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

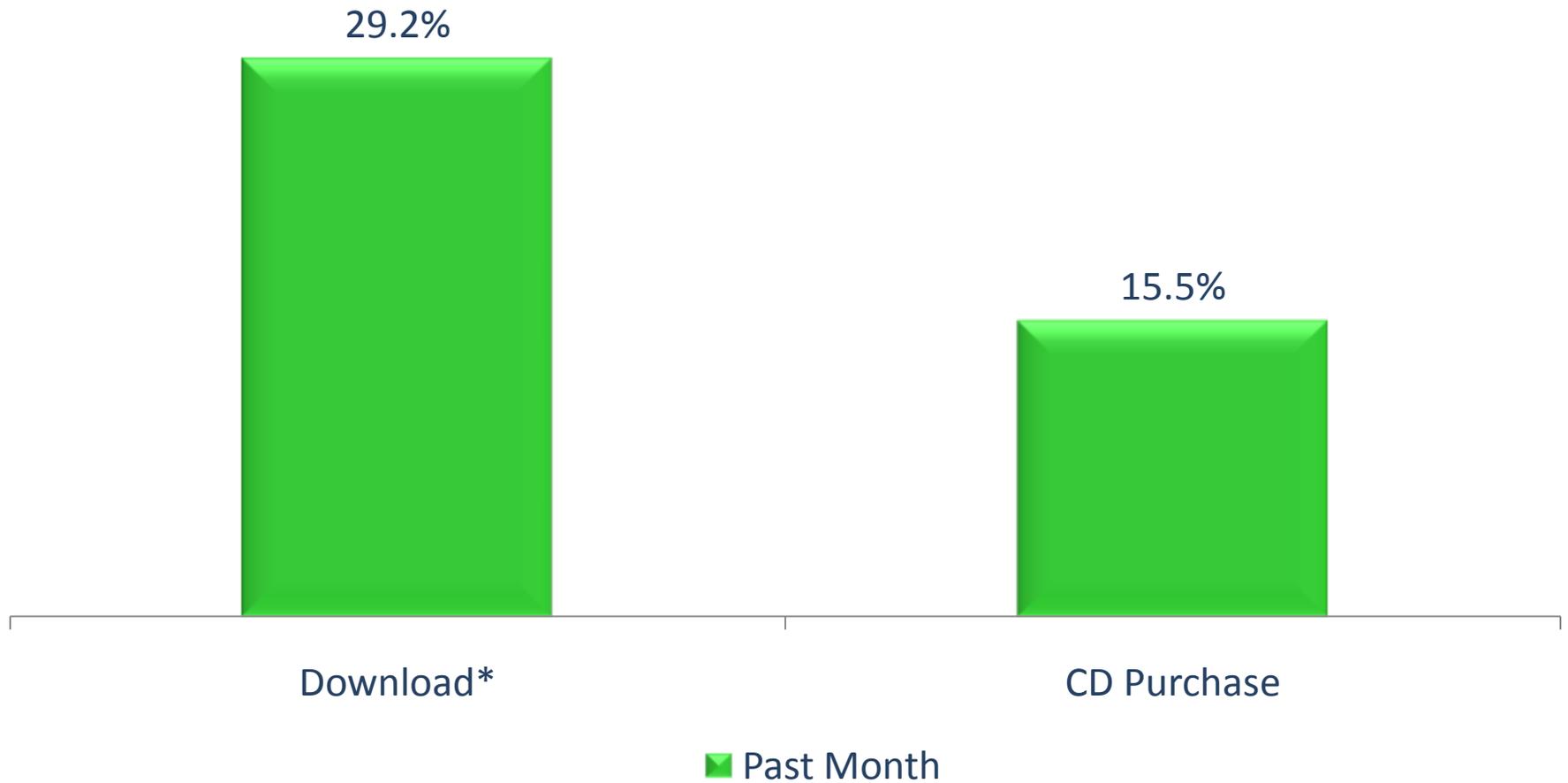
And Vice-Versa

	% Heaviest Radio Listeners
Total Sample	18%
Heavy iPod Users	23%
Heavy Streamers	30%

Why Don't You Listen to More Online Streaming?

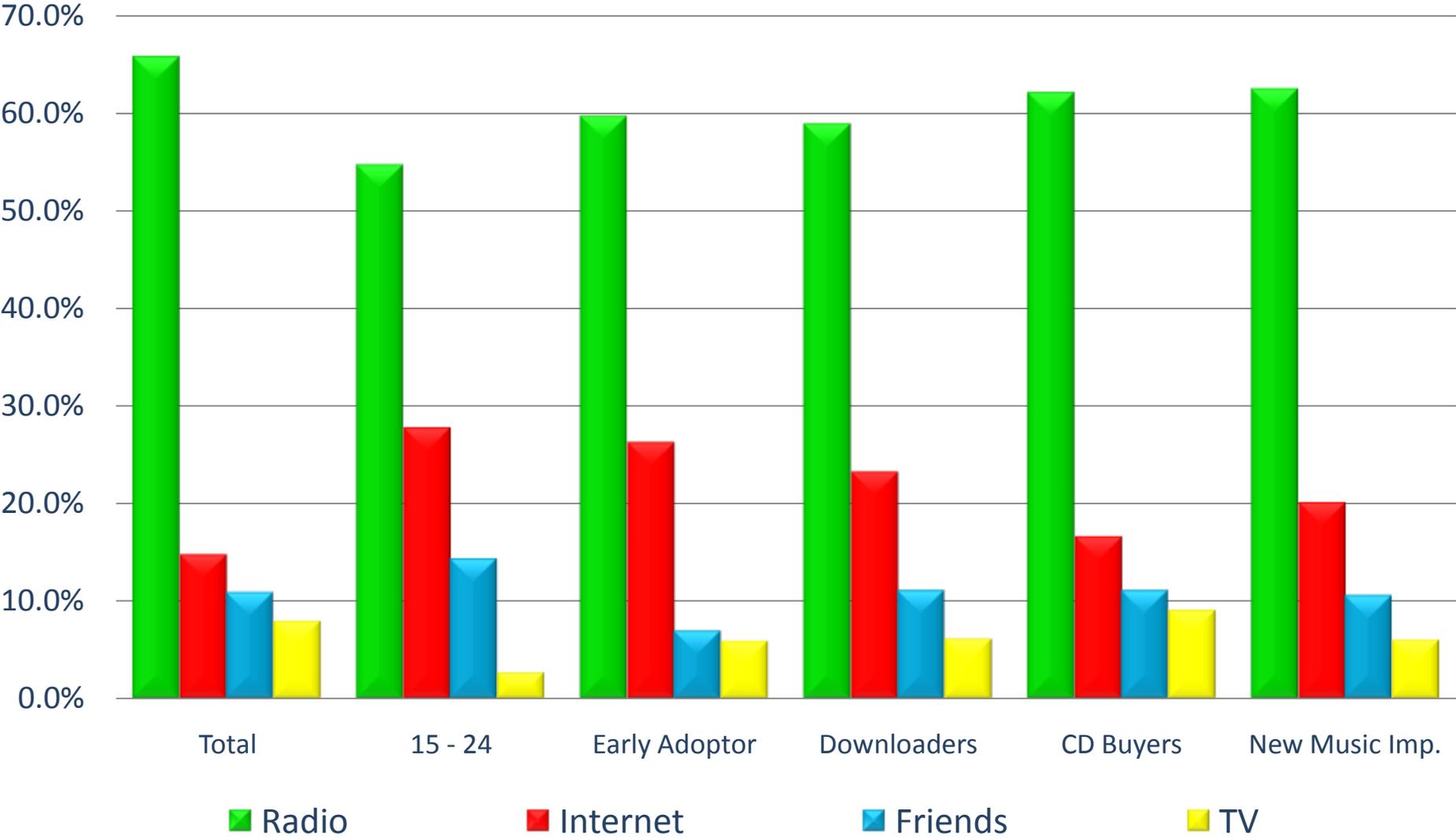


Music Purchase / Consumption



* with or without purchase

New Music / New Artist Discovery



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 Twitter account

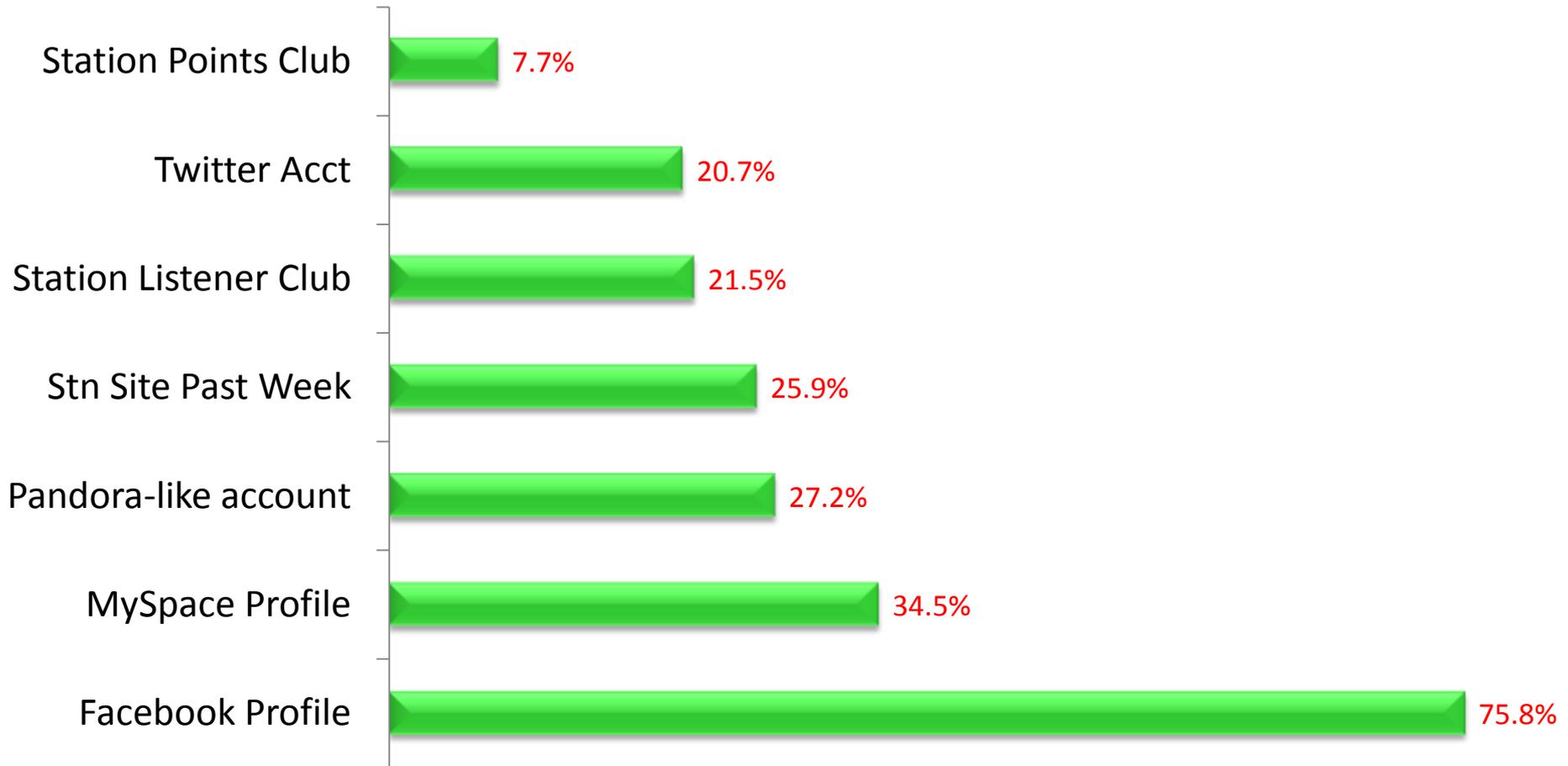
20.7%

Social Media and Radio Stations Online

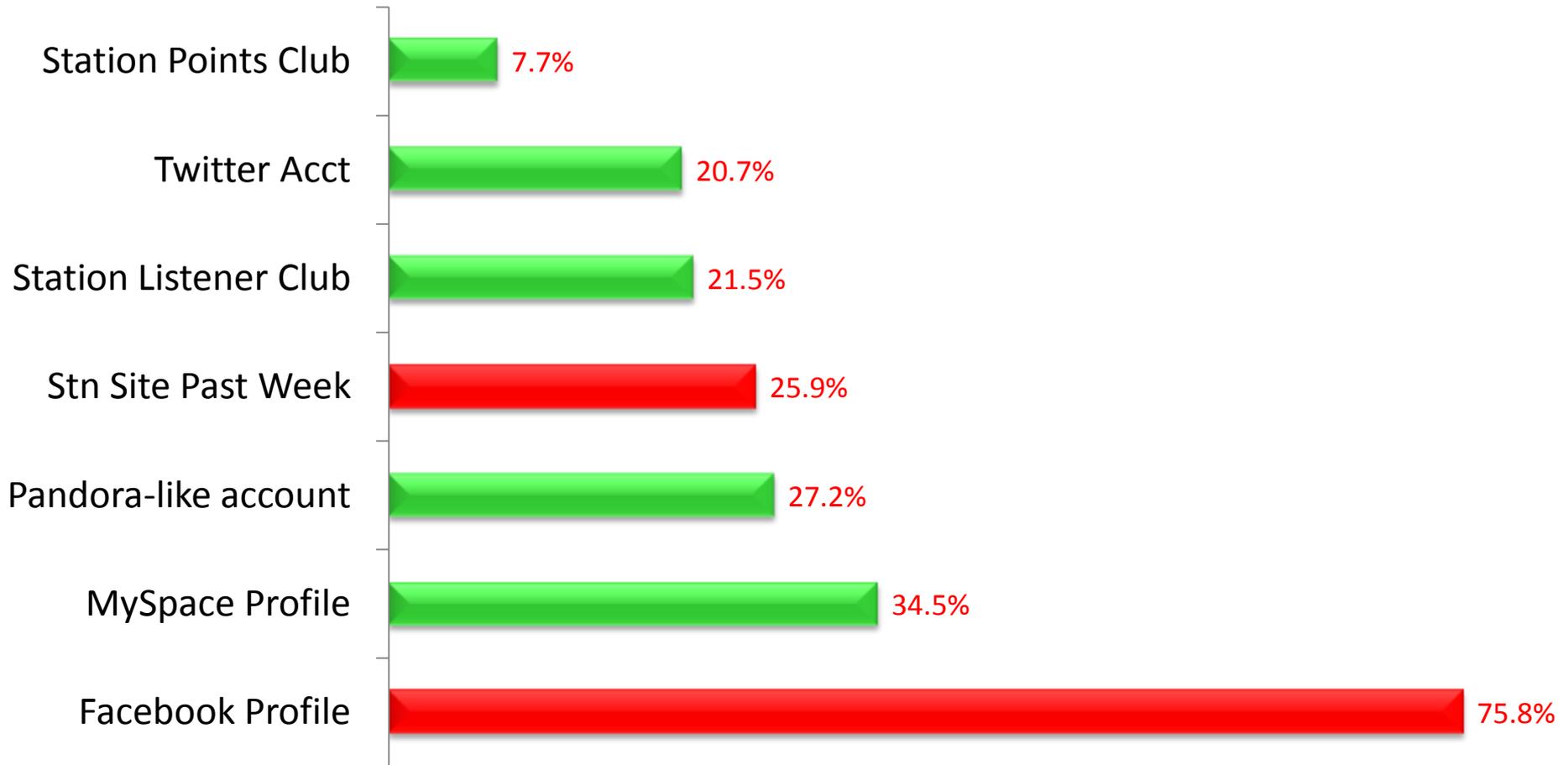
Radio Station Online Media

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%

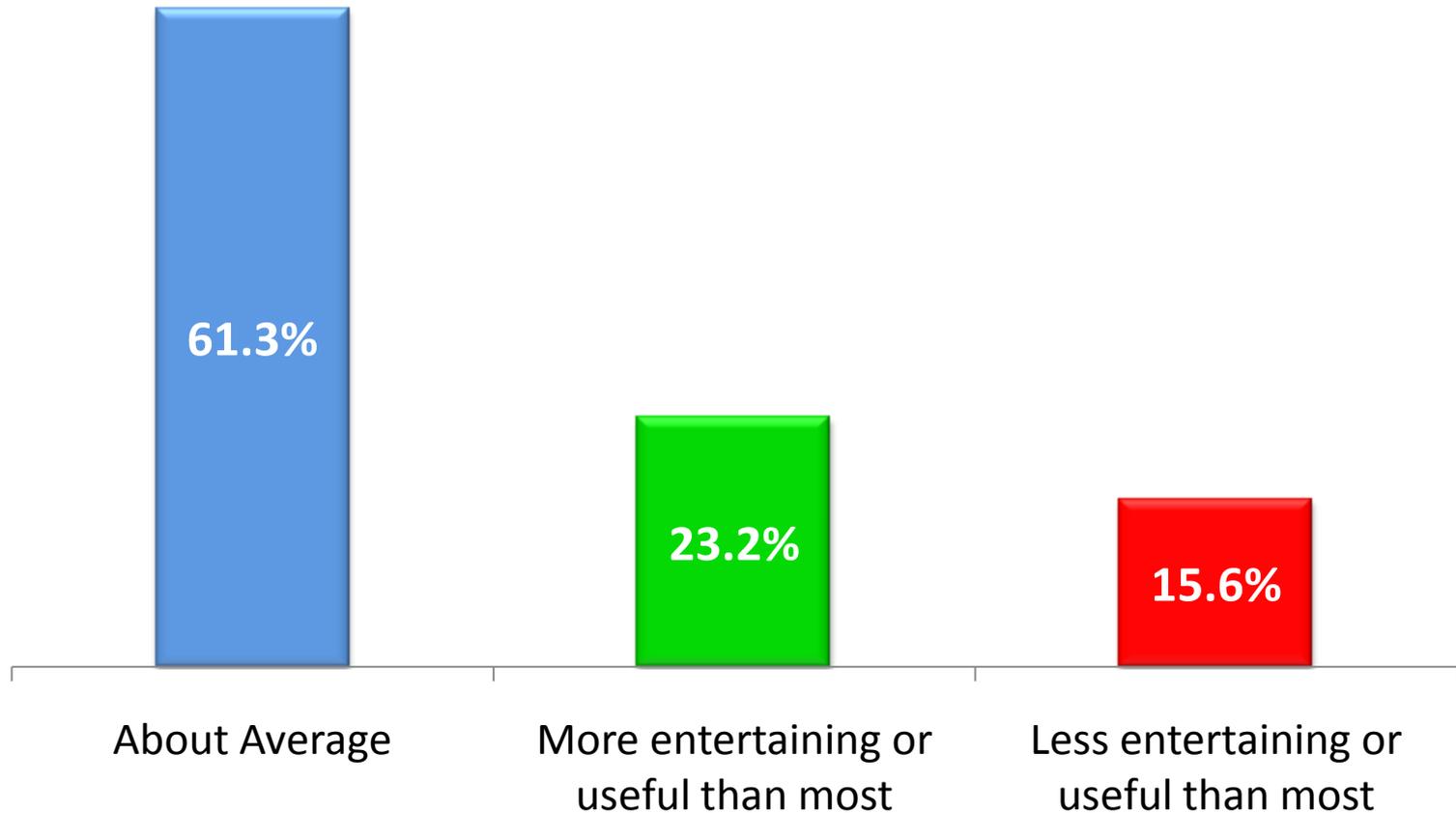
Radio Online in Context



Radio Online in Context

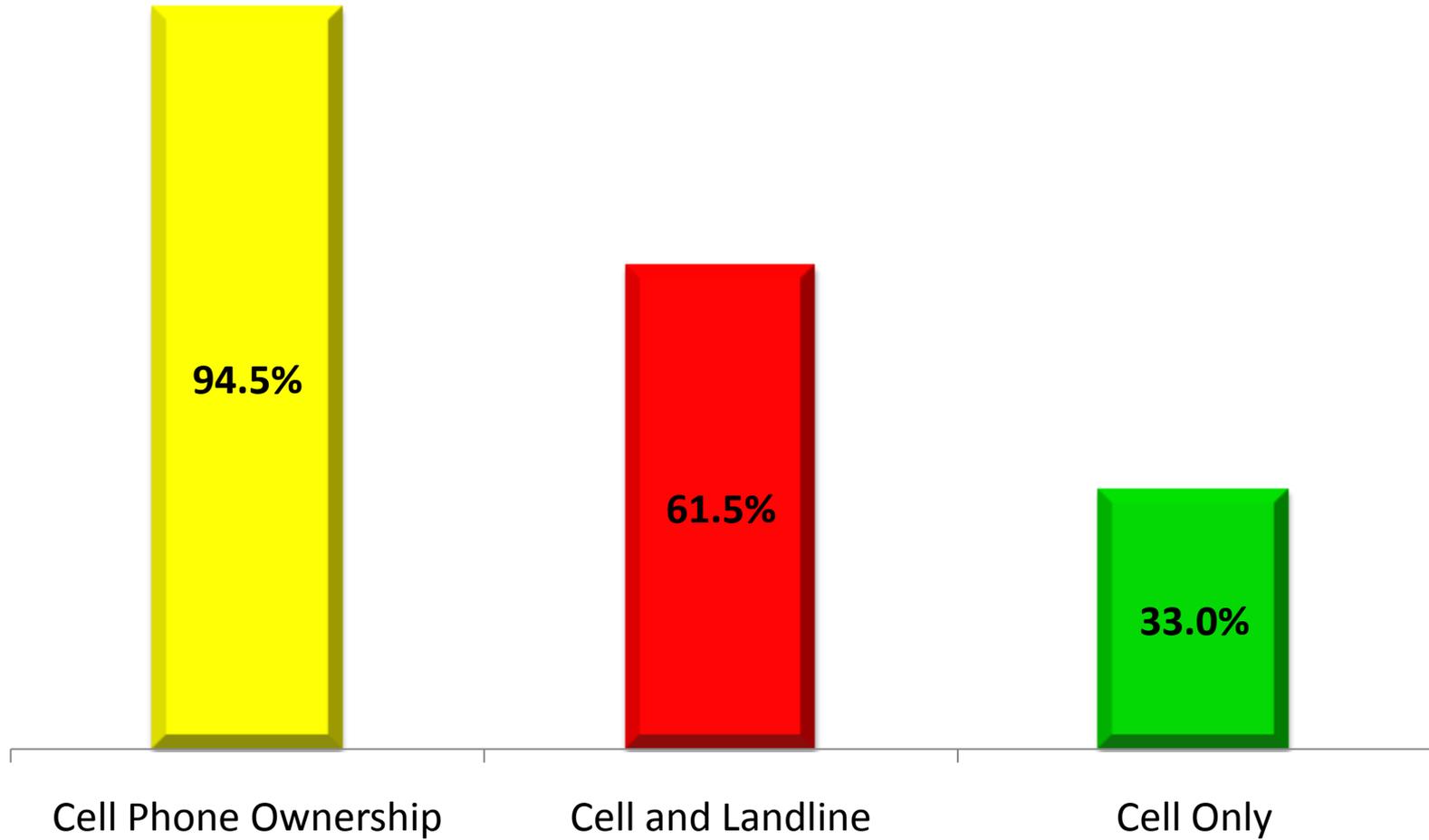


Just How Good are Station Web Sites?

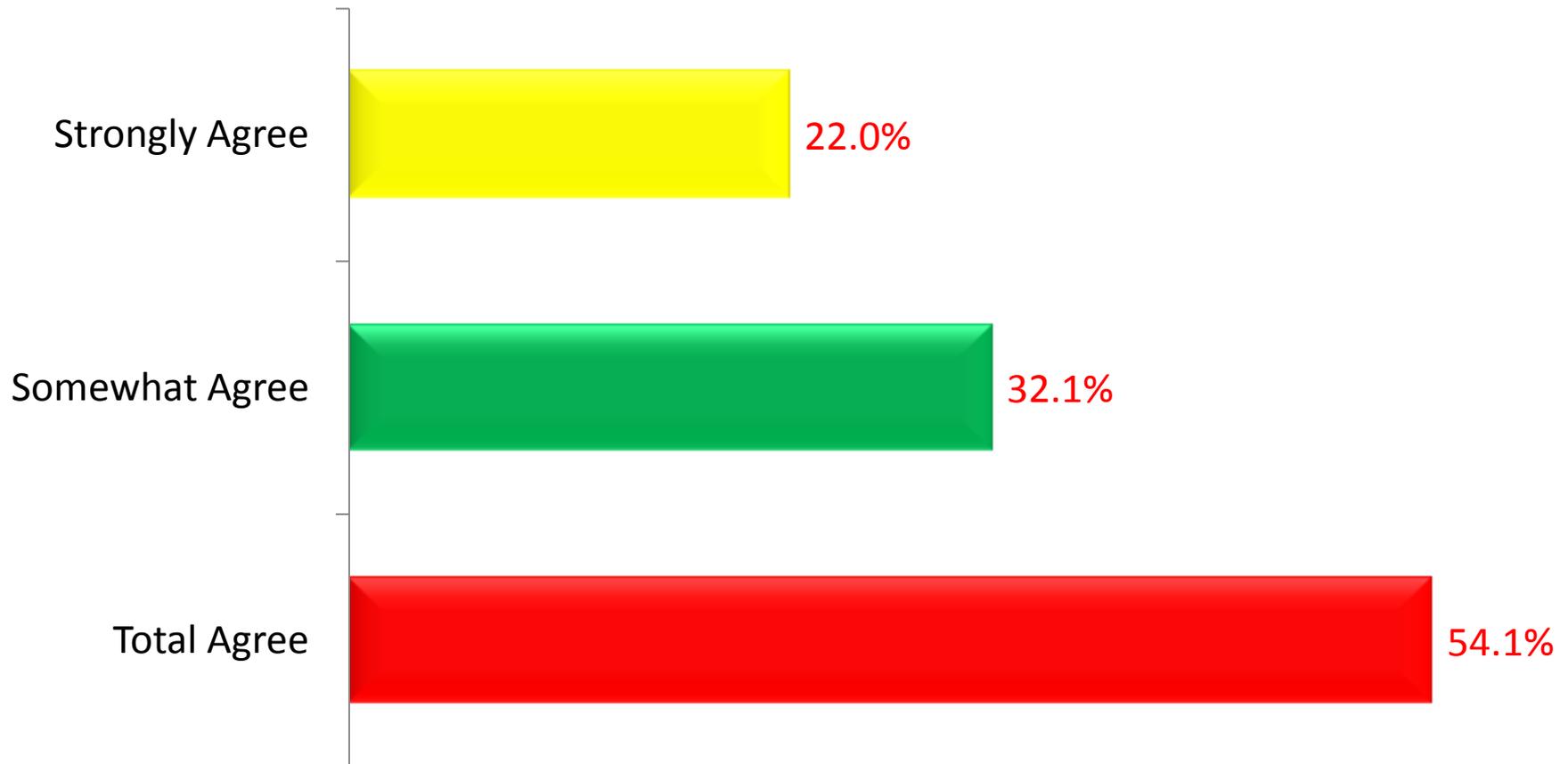


Radio and Cell Phones

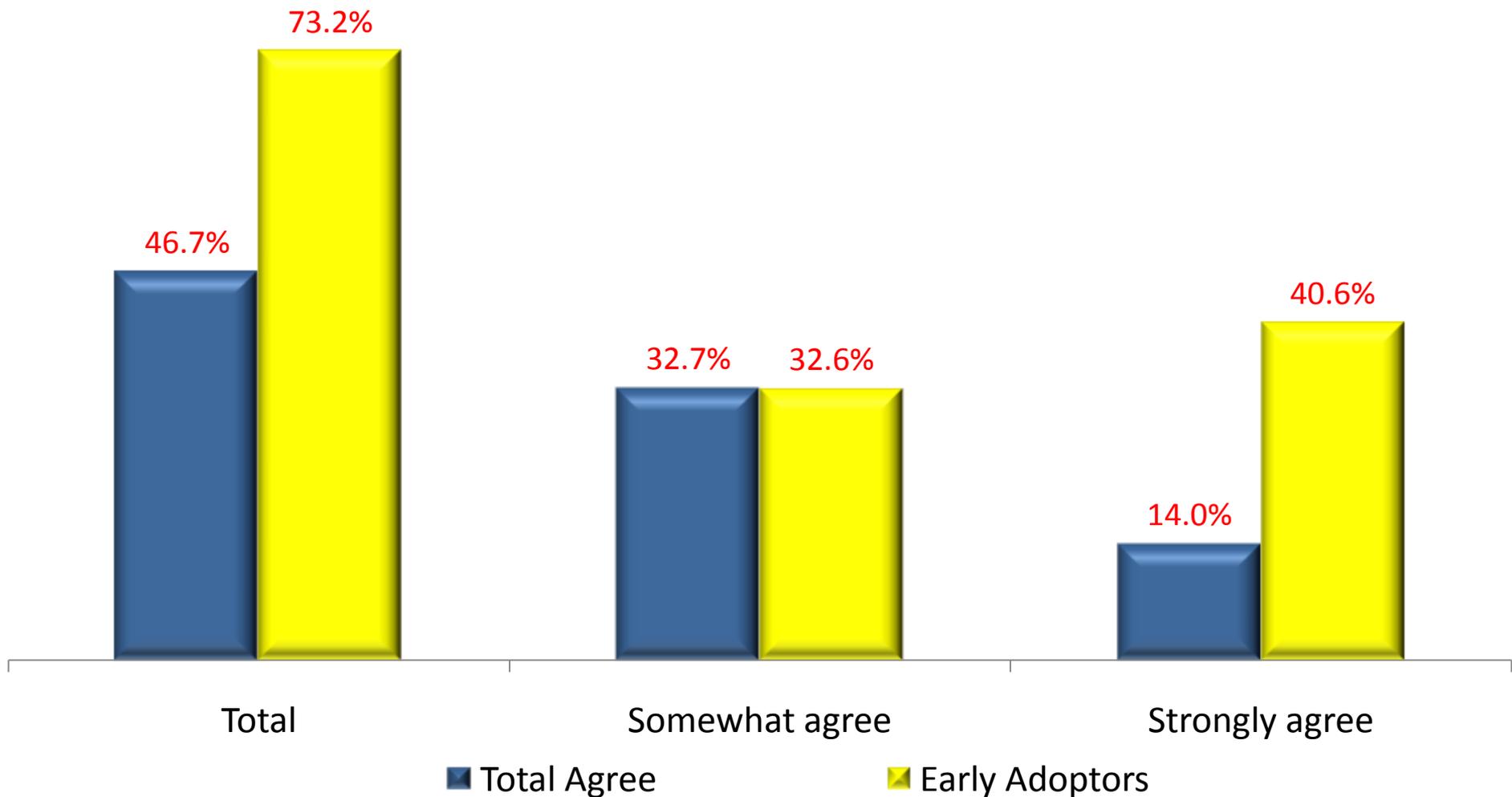
Cell Phones



“I would spend more time listening to radio if my cell phone had a receiver in it.”



“I would be more likely to buy a specific model of cell phone if it had a radio receiver in it.”



Summary & Conclusions

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.

Summary & Conclusions

❑ 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

Summary & Conclusions

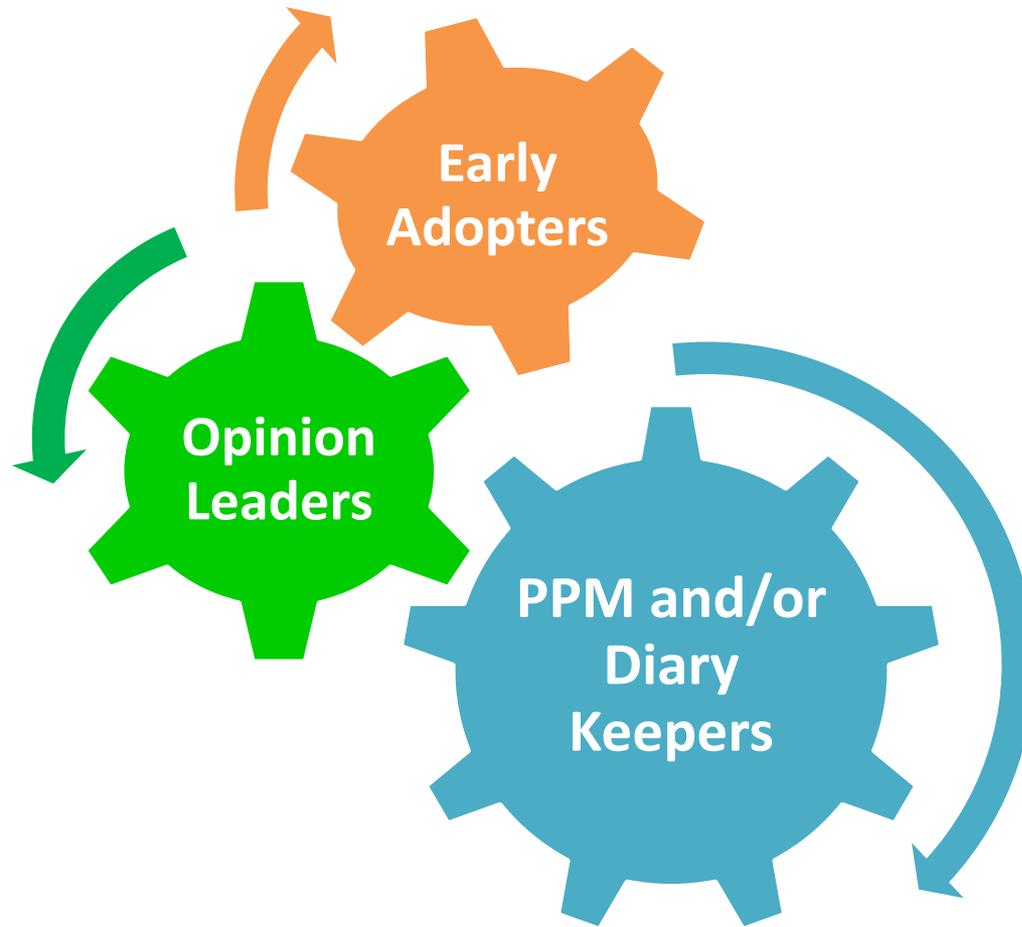
- ❑ Talk is a double-edged sword. Personalities are vital. Useless talk is a killer.
- ❑ 50/50 attitude toward personalities.
- ❑ Total time spent with streamed music relatively low, but will grow.
- ❑ Radio is still the dominant source for discovery of new music and artists.

Summary & Conclusions

- ❑ 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



For Everyone

- CHR Deep Dive

July 22nd -
2pm EST

- AC Deep Dive

July 29th -
2pm EST

- At-Work Listening with dmr

Aug 5th -
2pm EST

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



For additional information, please visit

www.burnsradio.com

or call: (251) 980-7070