

Whiskey Bent & Hell Bound



CRS
2001





64 Markets and More Than 85,000 Consumers Interviewed



**Why Is This
Important
Information for
Every Person
in This Room?**



1

**Consumer Intelligence
Is Critical to Station
Viability for Both
Ratings and Revenue**



2

**Passionate Listeners
Are “Driving the Bus”**



3

**The Future Belongs
to “State-of-the-Art”
Program Directors**



Let's Look at Some Common Perceptions...



Perception

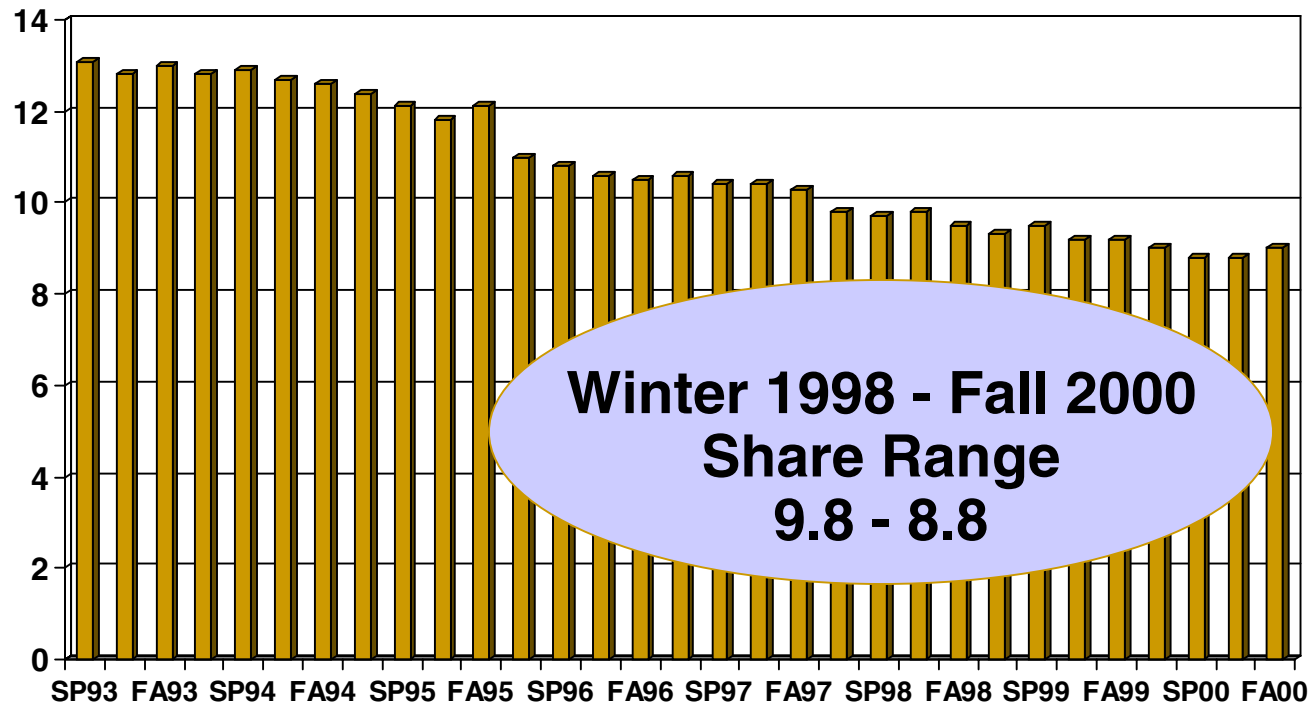
Country Radio Is Dead





Reality

Country Listening Trends



AQH Share – Persons 12+
Historical shares courtesy of Billboard and Radio & Records.

Perception

Country's Audience Is Downscale



Reality

Country's Appeal Is Universal

**53% female
47% male**

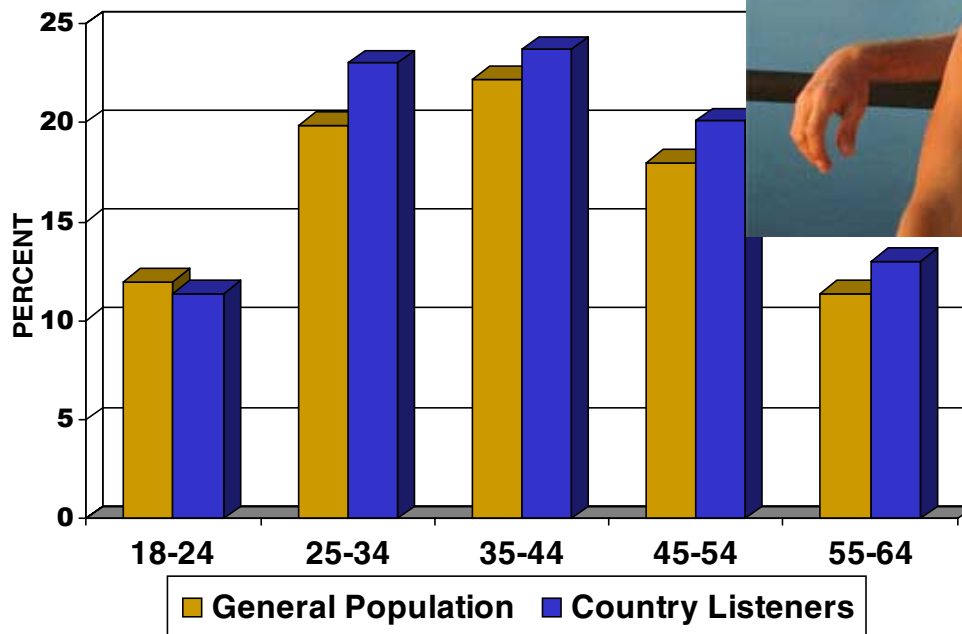
**45% have
at least
one child
at home**





Reality

Country Radio Reaches Adults



67%
25-54

Source: Scarborough – Release 1 of 2000 (six months only).
64 markets and more than 85,000 consumers interviewed.

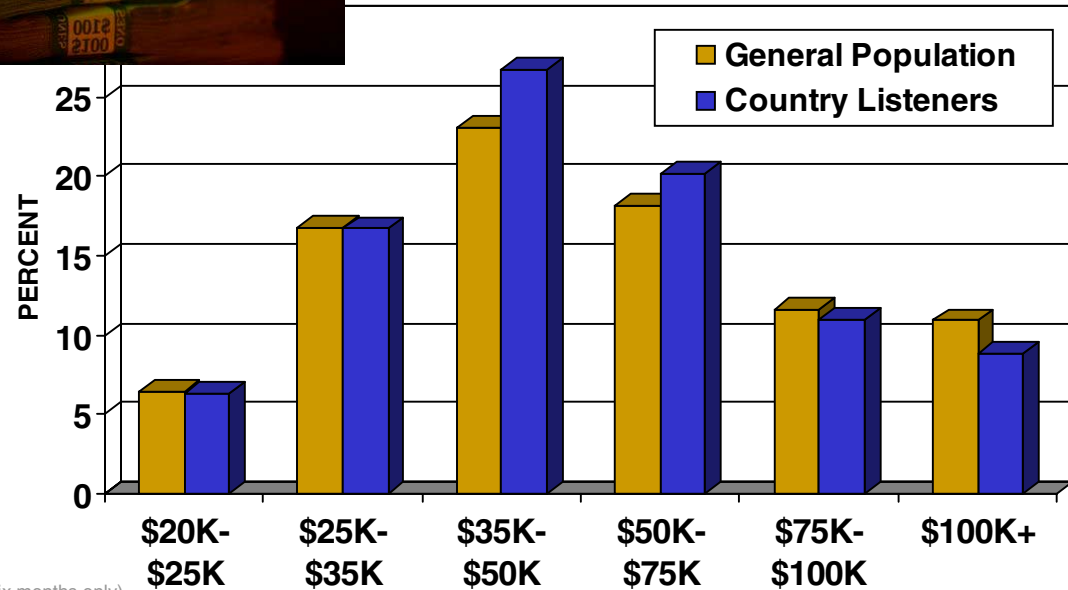


Reality

They Earn Good Incomes



40% earn \$50K+
67% earn \$35K+



Source: Scarborough – Release 1 of 2000 (six months only).
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Perception

Country's Audience Is All Blue-Collar





Reality

Country Listeners Have Professions in All Categories

- 12% executives and managers
- 16% administrative support
- 10% professional specialty
- 9% service workers





Reality

Country's Audience Includes Investors

**They know their way around Wall
Street:**



- 22% have stock or stock options
- 28% own mutual funds
- 14% have bonds
- 17% hold money-market funds



Perception

**They All Live in
Trailer Parks**



Reality

Seven of Ten Are Homeowners...

73% of Country radio listeners own their own homes



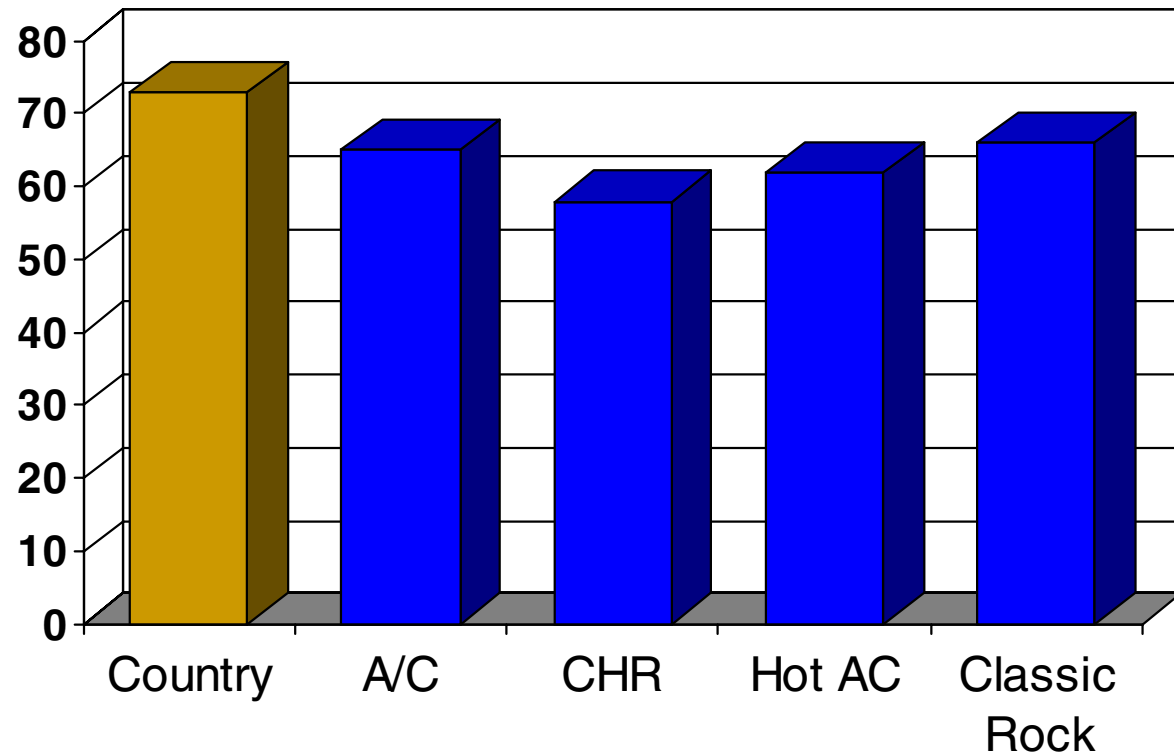
Source: Scarborough – Release 1 of 2000 (six months only).
64 markets and more than 85,000 consumers interviewed.





Reality

...More Than Other Formats



Source: Scarborough – Release 1 of 2000 (six months only).
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Reality

Own Second Home or Real-Estate Property...



8.2% own an investment property—
nearly on par with the general population



Perception

Country's Audience Is Low-Tech



Reality

Nearly Two-Thirds Are Plugged In

63% own a computer

17% plan to purchase a new computer in the next year



Reality

They Surf at Home

**38% of Country's audience
subscribes to an online service**





Reality

They Know How to Work the Web

What are they doing?



Using e-mail	38.3%
Accessing news	19.3%
Conducting research	19.8%
Playing games	18.9%



Reality

They Want to Feather Their Nests

Future purchase plans include:

- 27% new furniture
- 16% a new mattress
- 13% major appliances



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Perception

**They Are Just a Bunch
of Beer-Drinking Bubbbas**



Reality

Majority Doesn't Drink Liquor or Wine

**57% have not drunk liquor in the
past 30 days**

**59% have not purchased wine in
the past three months**





Quiz:

Which are Country radio listeners more likely to drink?

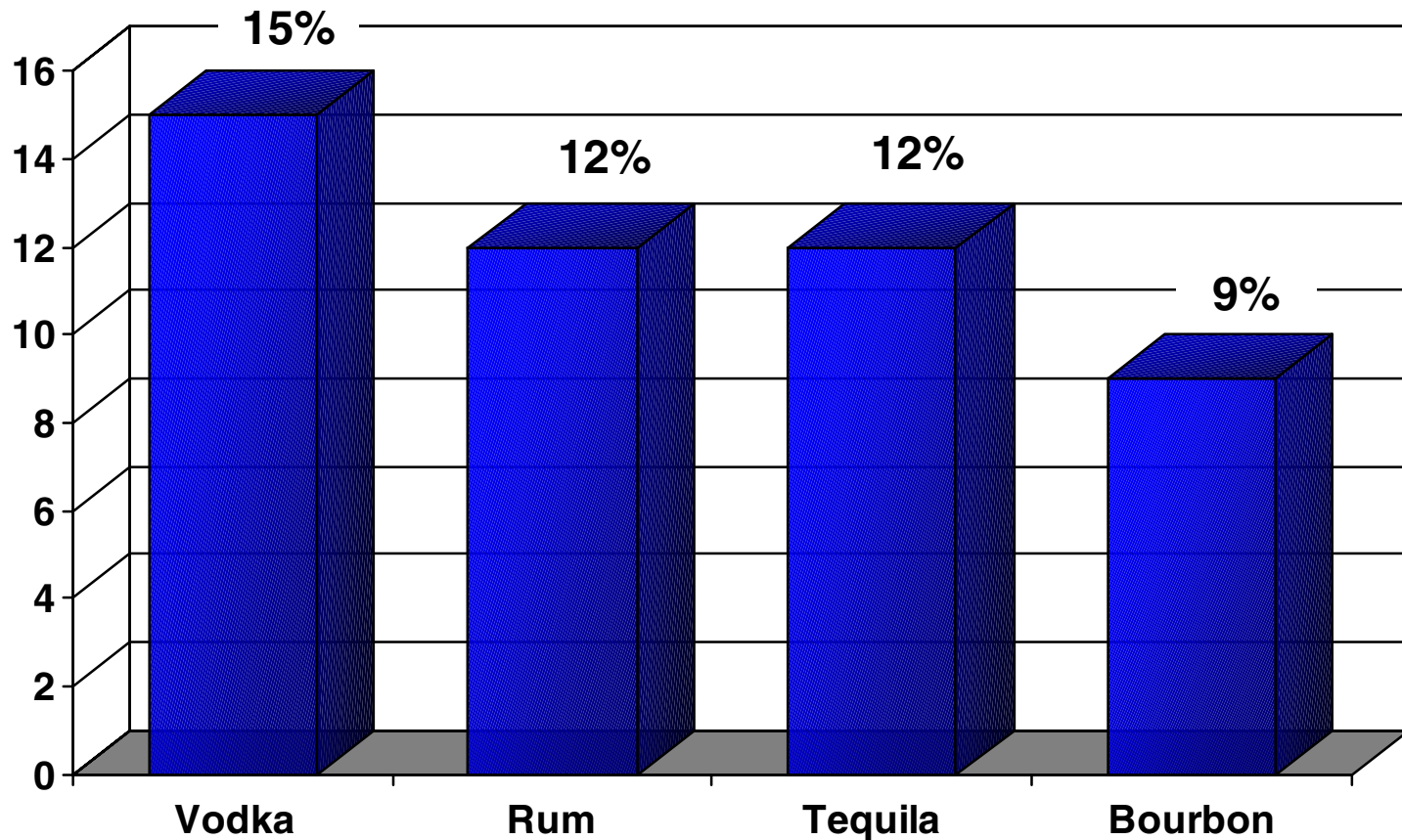
- A) Tequila**
- B) Rum**
- C) Bourbon**
- D) Vodka**





Reality

Liquor Consumption



Based on who consumed liquor in the past 30 days

Source: Scarborough – Release 1 of 2000 (six months only).
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Reality

Nearly a Third Are Beer Drinkers

31% regularly enjoy a beer



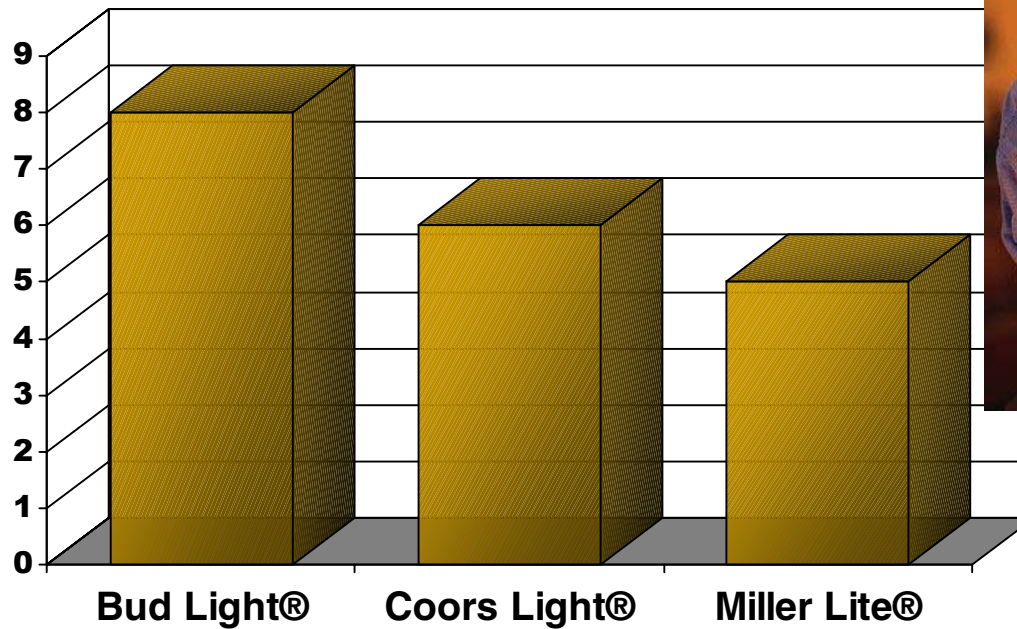
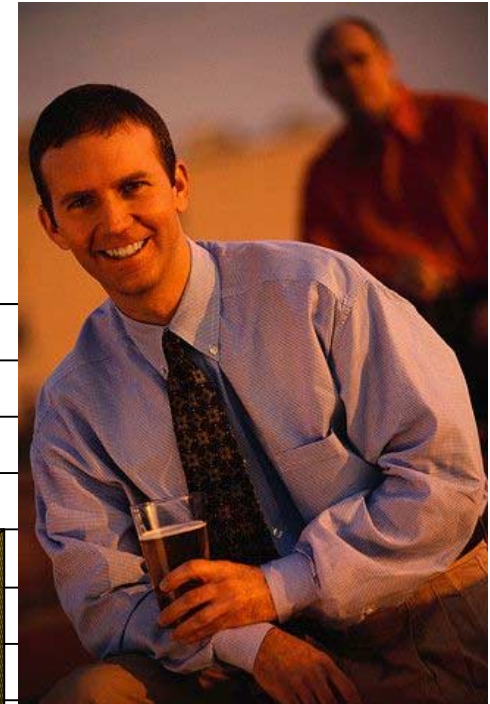
Source: Scarborough – Release 1 of 2000 (six months only).
64 markets and more than 85,000 consumers interviewed.





Reality

More Likely to Drink Light Beer



Based on who drank beer in the past week

Source: Scarborough – Release 1 of 2000 (six months only).
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Perception

They All Drive Old Pickups



Reality

Only a Third Own a Pickup

33% drive a domestic truck



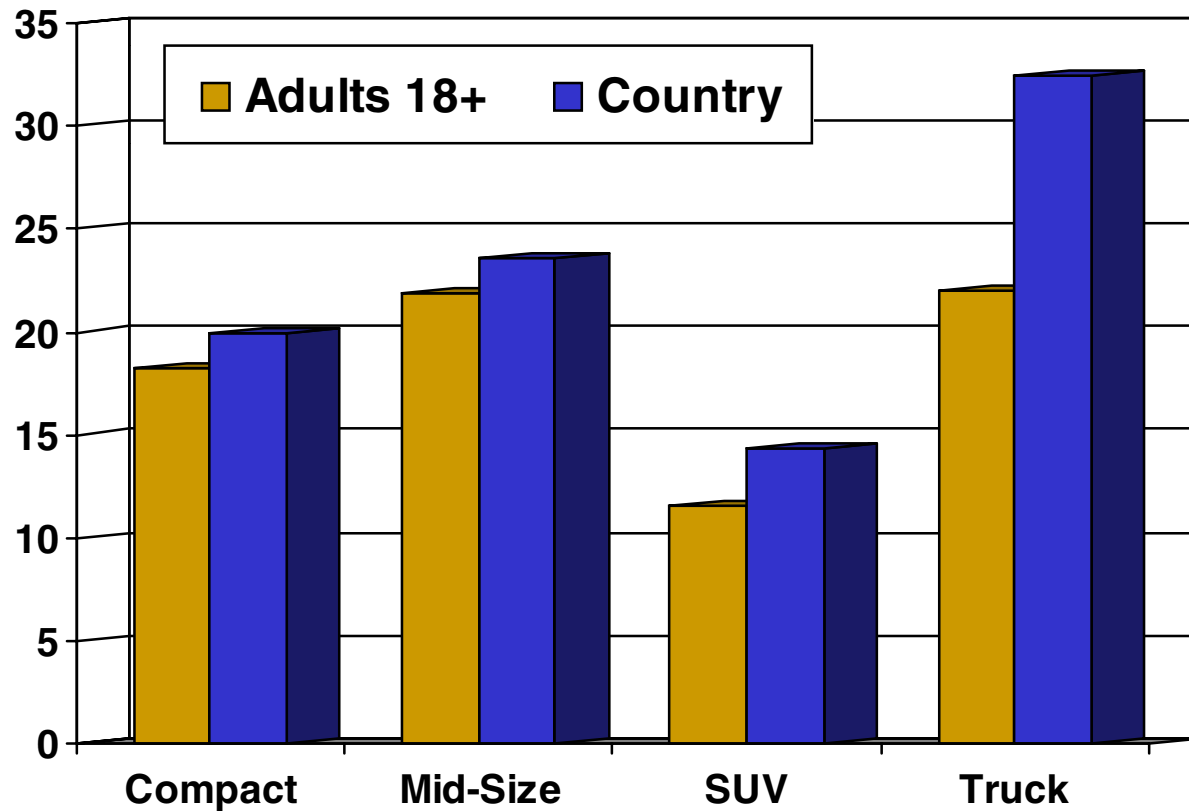
Source: Scarborough – Release 1 of 2000 (six months only).
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Reality

They Also Drive All Kinds of Vehicles



Source: Scarborough – Release 1 of 2000 (six months only).
64 markets and more than 85,000 consumers interviewed.



Reality

...And More Than One

Number of vehicles owned by Country's audience:

Two vehicles	40%
Three vehicles	18%
Four or more vehicles	10%

Source: Scarborough – Release 1 of 2000 (six months only).
64 markets and more than 85,000 consumers interviewed.



Reality

Like Others, They're Looking

13% plan to buy a new vehicle



Source: Scarborough – Release 1 of 2000 (six months only).
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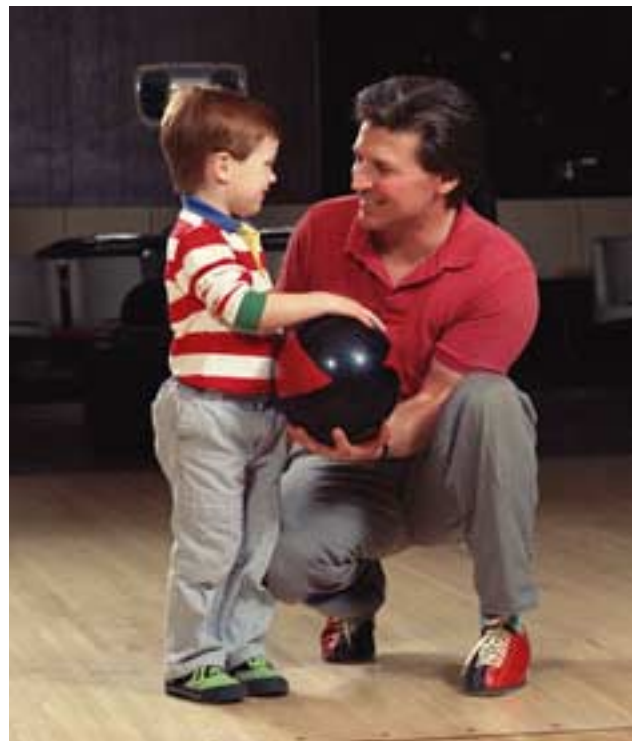
Perception

**They Spend All Their Time
at the Bowling Alley**



Reality

Only About a Fourth Bowl



**But they are
involved
in lots of other
recreational
activities**



Reality

They'd Rather Take in a Movie

54% of Country radio's listeners regularly go to movies:

14% will see new release in first two weeks

40% can wait two weeks



Reality

They Are Avid Readers



30% purchased
hardcover books

45% purchased
paperback books

Purchased in the past 3 months

Source: Scarborough – Release 1 of 2000 (six months only).
64 markets and more than 85,000 consumers interviewed.



Reality

66% Enjoy Walking



Source: Scarborough – Release 1 of 2000 (six months only).
64 markets and more than 85,000 consumers interviewed.

Reality

43% Enjoy Swimming



Source: Scarborough – Release 1 of 2000 (Six months only)
64 Markets and over 85,000 consumers interviewed.





Reality

32% Enjoy Bicycling



Source: Scarborough – Release 1 of 2000 (six months only).
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Reality

30% Enjoy Fishing



Source: Scarborough – Release 1 of 2000 (six months only).
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Perception

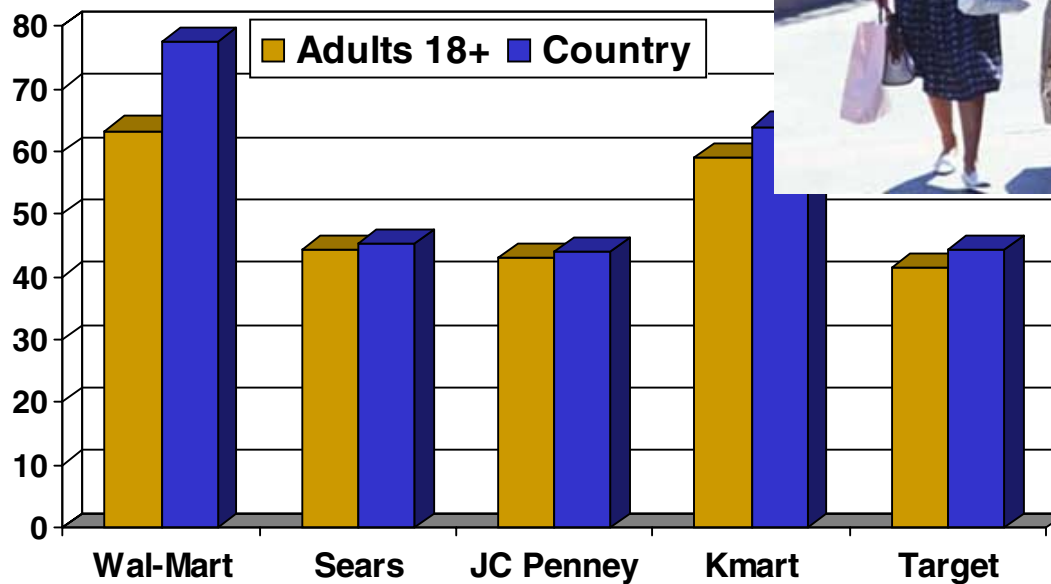
**They Only Shop at
Wal-Mart**





Reality

Wal-Mart Is *Not* the Only Place They Shop

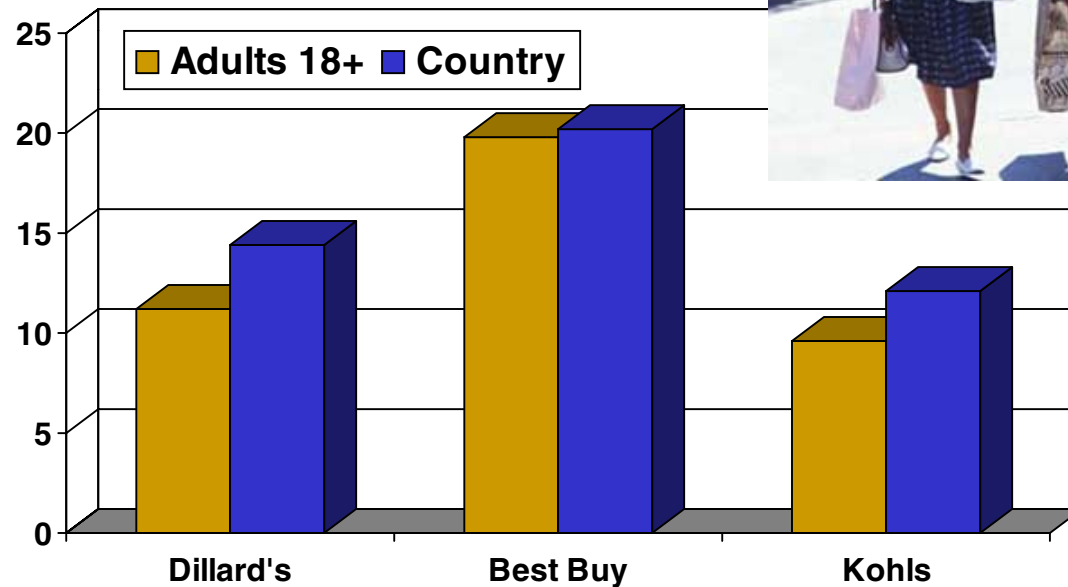


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Reality

Wal-Mart Is *Not* the Only Place They Shop



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Country PD Essentials...



Remember:
Revenue Follows
Audience



Marketing Math

Program to the “reality,” not the “perception!”

$$\begin{array}{r} \text{Whom} \\ \text{What} \\ \text{Where} \\ + \\ \hline = \end{array} \quad \text{Increased Ratings}$$



Marketing Math

Program to the “reality,” not the “perception!”

Whom (to target and partner with)



Marketing Math

Program to the “reality,” not the “perception!”

Whom (to target and partner with)

What (to give away/promote)



Marketing Math

Program to the “reality,” not the “perception!”

Whom (to target and partner with)

What (to give away/promote)

+ Where (what geo is best)



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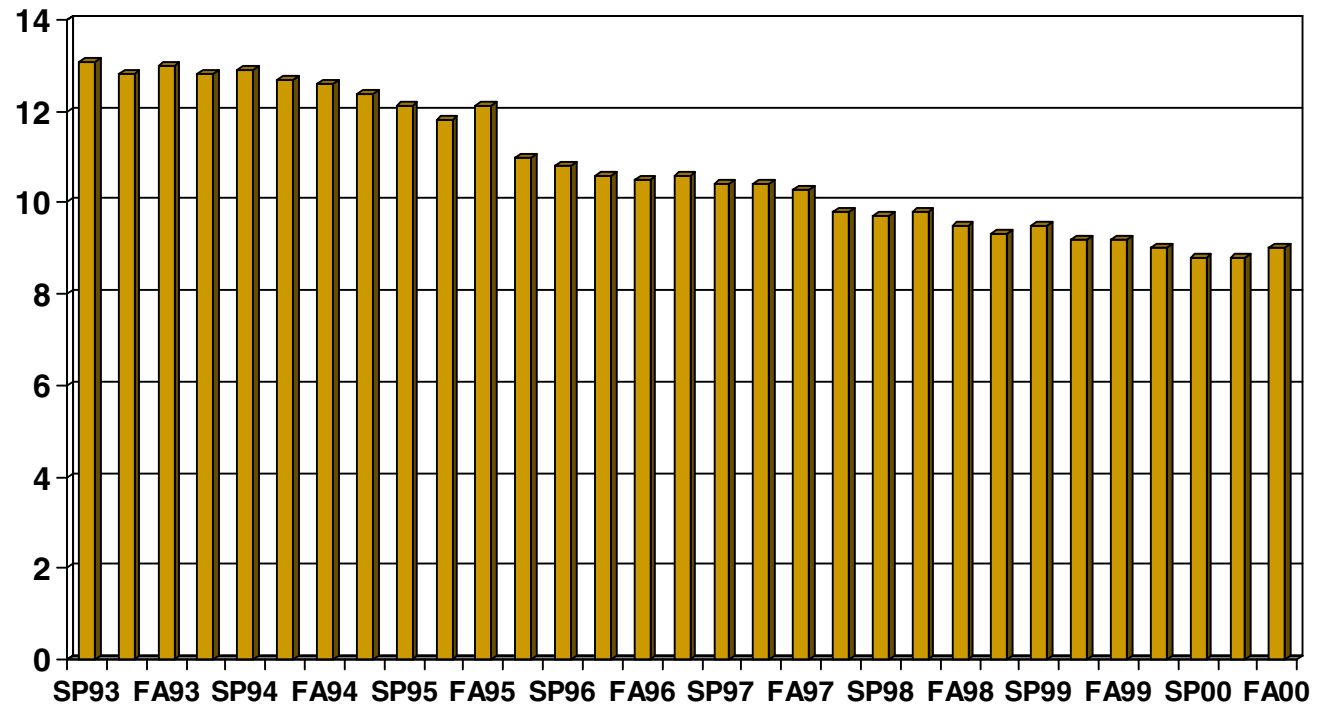
+ Where (what geo is best)

=

Increased Ratings



The Bloom Is Off the Rose



AQH Share – Persons 12+
Historical shares courtesy Billboard and Radio & Records.



ATTENTION PDs:
**The Single Most
Important Thing to
Remember From
This Session...**



**Focus on your
most passionate
consumers...**



P1



P1s Determine Your Success

36% of Your Cume

72% of Your AQH



P1 Listener:
17 Hours

P2 Listener:
5 Hours



Hunt Where the Ducks Are!





So...

**Let's Consider
Some Ideas for
Smart Promotions**



65% of Country Listeners Own a Pet



Dogs or Cats?



Dogs or Cats?



46%



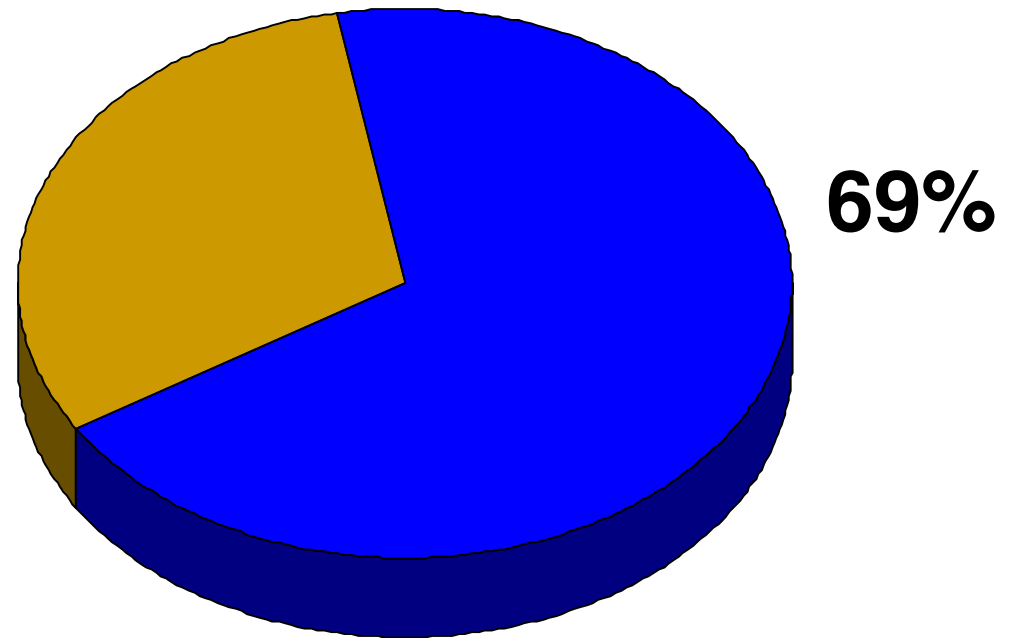
34%





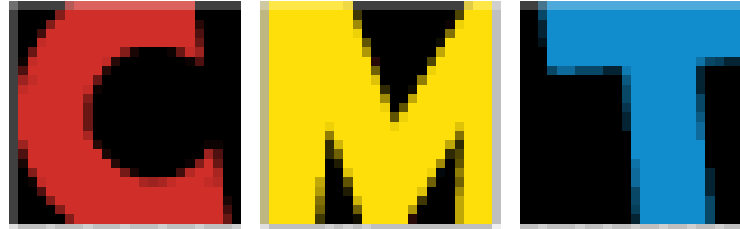
Connect with Your Listeners on Cable TV

Country's audience subscribes to cable TV





But Where?



26%

Tuned in during past seven days

Source: Scarborough – Release 1 of 2000 (six months only).
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Look at What Else Your Audience Is Watching:

A&E 39%
Escape the ordinary™

EXPLORE YOUR WORLD™
Discovery CHANNEL 42%

CNN 37%

TBS 34%
SUPERSTATION

ESPN 34%

FOX family 36%

Tuned in during past seven days

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Let's Review...



1

**Consumer Intelligence
Is Critical to Station
Viability for Both
Ratings and Revenue**



2

**Passionate Listeners
Are “Driving the Bus”**



3

**The Future Belongs to
“State-of-the-Art”
Program Directors**



Information That Can Help...and It's Free

Arbitron reports on:

- American Radio Trends
- American Radio Today
- Where Do My P1 Listeners Go?
- Where Do My P2 Listeners Come From?

All at www.arbitron.com



Thanks, Y'all!

One Final Thought

