



Arbitron/Joint Communications

What Women Want: From Country Radio

A Format-Specific Summary Taken from
*What Women Want: Five Secrets to Better
Ratings*

For the full study, *What Women Want: Five
Secrets to Better Ratings*, go to:

http://www.arbitron.com/radio_stations/studies1.htm

Welcome to the Arbitron/Joint Communications summary of American women Country radio listeners. This format-specific summary is taken from a groundbreaking study based on interviews with Arbitron diarykeepers that asked the timeless question “What do women want?”

This report focuses specifically on 18- to 54-year-old female diarykeepers who listen to Country radio.

The Study

In July 2001, Joint Communications conducted telephone interviews with 1,060 female Arbitron diarykeepers aged 18-54 to find out what they want from radio. Diarykeepers of all Arbitron-identified formats were included. These women were asked questions about lifestyle, loves/hates about radio, reasons for tuning in or out, and specific radio behaviors and needs. This special report focuses on Country music listeners only.

Top 10 Things to Know About Female Country Radio Listeners

- 1. Time Stressed.** Diarykeeping women who listen to Country radio are the most time stressed of *any* format's listeners. Over two-thirds feel like they never have time to get things done. Don't waste theirs.
- 2. Overwhelmed by Commercials.** Like other formats, over three-fourths say the #1 reason for tuning out of radio is "too many commercials."
- 3. Kid Sensitive.** Country radio women are like other radio women. They don't want radio that is inappropriate for kids. Over 60% "strongly agree" they'll tune out if the kids can't (or shouldn't) listen.
- 4. DJs Are Important.** Country radio listeners are more likely than listeners to most other formats to think DJs are important. They are more likely to want funny DJs. But they are really turned off by rude announcers. And they are more likely than most listeners to complain about "too much talk" as a negative. Keep the talk focused.
- 5. ID Songs.** Over half of all Country radio women "strongly agree" that radio should identify songs and artists more than they do now.
- 6. They Like to Win Things.** Women who listen to Country radio are just as likely as others to agree that "I like to win things," with nearly 50% saying they "strongly agree." But, very few of them (just over one in 10) have listened to the radio to win something. Work on ways to have lots of winners that don't necessarily involve an on-air contest.
- 7. They Respond to Direct Appeals.** Diarykeeping women who listen to Country radio are the most likely of any format's listeners to respond to direct appeals...particularly if they were contacted by mail. Once contacted (20% of all Country women had been reached this way), 80% listened for a chance to win. No other format even came close to this response level!
- 8. The Internet Is Not Everywhere.** A lot (40%) of Country female listeners don't use the Internet. Among working Country women, less than one-fourth of them ever accessed the Internet at work. Keep those faxes, phone banks and postage stamps handy.
- 9. Daydreaming.** A Country radio woman who fills in an Arbitron diary is more likely to agree that "radio helps me enjoy things in my imagination that I would never do in real life" and that it helps her escape her day-to-day life.
- 10. Frequent-Listener Clubs Can Work.** On the whole, most Country radio women aren't active members of "frequent-listener clubs" or "at-work clubs" (about 8% are). However, if they are, they are really loyal and very passionate fans of your station. And, there are *twice* as many club members among Country women as there are on all other formats. Keep them happy.

Overview

Female Diarykeepers for Country Radio

- “Too many commercials” is the leading tune-out for Country radio women.
- Contests must be carefully targeted and focused for Country radio women. Over 20% see them as a “big” tune-out factor.
- Country radio women want their favorite music and lots of music. Regardless of age, the #1 reason women tuned in to the radio was for “Music I Like.”
- Country radio women are more motivated by hearing about a radio station from a friend than by any other advertising medium.
- Country radio women demand radio they can listen to with children and will turn the dial if it is offensive.
- Country radio “working” women—who listen at work—are only slightly more positive about contests than Country radio women in general.
- Country radio women are more likely to respond to a direct appeal to play a contest than women who listen to any other format. This suggests they have strong relationships with their favorite stations.
- More Country radio women define themselves as “liberal” (40%) than “conservative” (32%).
- Their favorite TV shows are legal/crime dramas such as “Law & Order” and dramas such as “ER.” They are twice as likely to watch soap operas as women who listen to other formats are. Their favorite game show on TV is “Who Wants To Be A Millionaire.”

Responsibilities Are Heavy

Country radio women are juggling more responsibilities than ever. They are pressured for time, worried about their kids’ safety and overwhelmed by commercialization.

However, in spite of all the pressure, Country women today are still optimists. They are even more likely to believe in the American Dream than the average diarykeeper. They believe they can choose what they will be, and they believe that hard work brings success. Key themes in their lives seem to be lack of time and difficulty in winding down at the end of the day.

Country Women Are the Most Time Stressed

Women who listen to Country radio are the most time stressed of all radio listeners. Sixty-seven percent “strongly agree” with the statement “I never seem to have enough time to get everything done.” Country radio plays a role not only in keeping these busy women up to date, but also serves as a stress reducer and, in some cases, a companion.

Kids Matter

Children are front and center—Country radio women want radio that’s OK to listen to with their kids, and they’ll tune out if “it’s not good for kids to listen to.” Sixty-eight percent “strongly agree” they’ll tune out if it’s not appropriate for kids.

Contests — Positives and Negatives

There are sharp divisions among Country radio listeners about contests. Their feedback put contests in a new light, challenging common wisdom that most listeners enjoy playing along with contests even if they don’t try to enter. But it shows that Country listeners are as ambivalent about contests as other women 18-54.

Key Findings

1. **Country radio women say that “favorite music” is the biggest reason for tuning in, and the need for “lots of music” diminishes with age.** “Country” women overwhelmingly said that “Music I Like” is the biggest reason they tune in (92%), followed by “Lots of Music” (85%). The demand for lots of music is much higher among Country radio women than among average 18- to 54-year-old diarykeepers.

For women in general, the demand for “Music I Like” does not change with age, but the demand for “Lots of Music” declines. This emphasizes that picking the correct songs can be key in keeping women tuned in. Fifty percent of Country radio women said that they would tune out because of a song they did not like.

2. **Women will turn the dial if they hear programming that is not “family friendly.”** Ninety-five percent of Country radio women strongly agree that family is the most important thing to them. This comes into play with radio habits, since nearly 70% of Country radio women “strongly agree” that when they tune *out* a radio station it is because there is something they don’t want kids to hear.
3. **“Too many commercials” is the #1 tune-out.** Women had no problem telling us what they do not want, and most are saying loud and clear that “too many commercials” is the reason they turn the dial. While programmers and managers argue about spot loads, women are busy tuning out the station.

Seventy-four percent of Country radio women said that “too many commercials” cause them to tune out.

4. **DJs are important to Country radio women.** Country radio women like their DJs. Compared to 18- to 54-year-old diarykeepers, twice as many Country radio listeners said that DJs were one of the things they loved about radio. And they want to laugh.

Forty-eight percent of Country radio women “strongly agreed” with the statement “DJs should make me laugh”—compared with 37% of women listening to all other formats. However, it shouldn’t be taken as a license to talk with nothing to say.

More Country radio women agreed with the statement “DJ’s talk too much” than the average diarykeepers in all other formats.

And the sound of the voice is important too. Almost twice as many Country radio listeners said that “The sound of a DJ’s voice is more important than what they say” as did all other diarykeepers.

Funny DJs are also a strong tune-in for Country radio—60% of Country women “strongly agree” that they tune in to radio for “funny DJs.”

- 5. Women want to hear the song identified, and that's as important as funny DJs.** Fifty-eight percent of women strongly agreed that radio stations should identify songs and artists more than they do now. This is not unique to any age or format. Women of all ages strongly agree that this is important.

This is not surprising in an era where radio stations don't identify songs and record companies don't even put the names of songs on their CDs.

In other words, for Country radio, a balance of humor and great music with song identification helps lead to success.

- 6. Women continue to be optimists and American Dreamers.** Even though women are heavily pressured for time and responsibility, they remain optimists. So, don't play to the negatives.

Eighty-three percent of Country radio Arbitron diarykeepers "strongly agree" that hard work brings success, and 67% believe they can be whatever they choose to be—statistics that are uniquely American, reflecting a free and upwardly mobile society. Sixty-nine percent of these women also said that they feel happy and content most of the time.

Keep in mind that Country radio women are more stressed for time than other women. They are more likely to strongly agree with the statement "I don't have enough time to listen" as a reason for turning off the radio, and they are much more likely to strongly agree with the statement "I never seem to have enough time to get everything done" (67%).

So, you won't win them over with slogans such as "Now we play more of your favorite music so you can listen longer." They'll think you don't understand them and you're talking to someone else.

- 7. Women dislike "rude announcers" almost as much as "too many commercials."** Sixty-eight percent of Country women strongly agreed that "rude announcers" caused them to tune out, and 56% say cheesy/phony announcers caused them to tune out. Women seem to have a big problem with rude announcers across all ages. Even among 18- to 24-year-olds, 65% strongly agreed that "rude announcers" are a tune-out.

Rudeness, phoniness and meanspiritedness are big no-nos with female diarykeepers regardless of age. Remember that female diarykeepers are really concerned about kids and what they hear. They are tired of rudeness and inappropriateness.

- 8. Most Country radio women work, but less than half (46%) of them listen to the radio at work.** If they listen to the radio at work, time spent listening is high—so they are important to your Average Quarter-Hour.

Most Country radio fans who listen to the radio at work *don't* access the Internet at work. In other words, if the Internet is your key way of involving listeners with your station at work, you're leaving most of your listeners out of the offer.

- 9. Most Country women access the Internet, just *not* at work.** Although many Country radio listeners access the Internet, they don't use it as much as most other 18- to 54-year-old radio listeners.

Fifty-nine percent of all Country radio women 18-54 log on weekly. Of those, a significant majority (38%) log on *only* at home; 6% log on only at work; and 15% log on at work and at home.

Therefore, note that 41% of all Country radio diarykeepers 18-54 *never* log on to the Internet. Maybe it's time to bring back some of those "old-fashioned" technologies like telephone and fax.

- 10. "At-work" visits by personalities should be used selectively.** Eighty-six percent of working women who listen to Country radio said they do not want a visit from a radio personality at their workplace.

However, the 14% who do want a visit are much more likely to be loyal to you. There is a very high proportion of at-work/frequent-listener club members in this group.

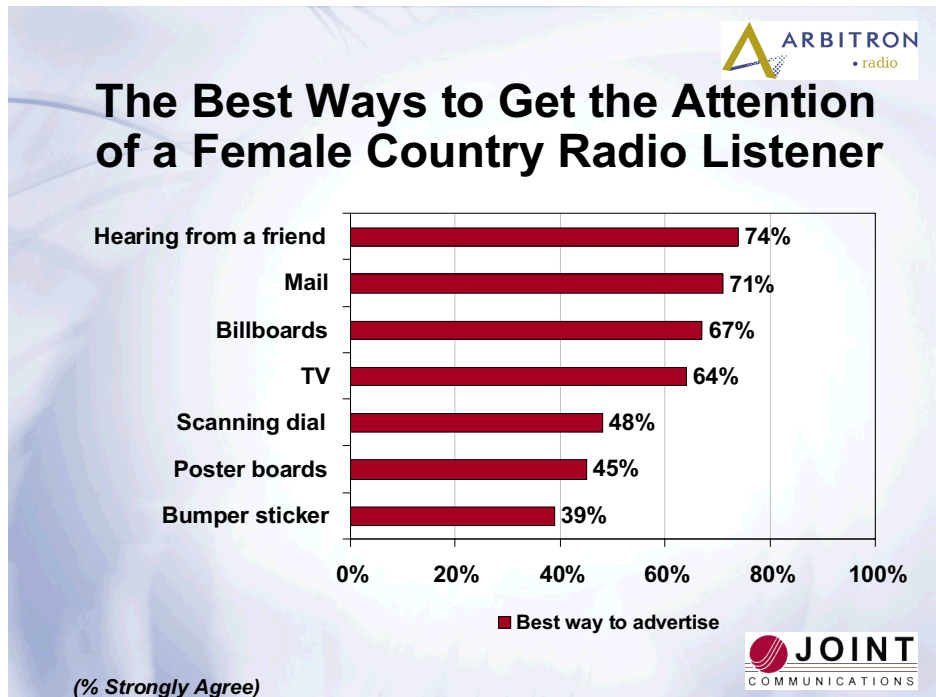
- 11. Twice as many Country listeners are members of at-work or frequent-listener clubs than the average 18- to 54-year-old female diarykeeper.** And, although the number of working women who are frequent-listener club members is low, these women (of all formats) are highly desirable listeners for many reasons:

- They are *twice as likely* to think contests are fun for entertainment value, even if they don't play.
- They are *three times as likely* to think of DJs as friends.
- They are *twice as likely* to think that DJs should make them laugh.
- They are *three times as likely* to want a visit from radio station personnel at work.
- They are *twice as likely* to use radio advertising to make purchase decisions.
- They have *double* the time spent listening as a non-club member.

To put it in perspective, 8% of all Country diarykeepers who listen at work are active members of frequent-listener clubs. They are part of your success but not all of it.

12. Country radio women say that *the best* way to find out about a radio station is hearing about it from a friend. Even more than television? Yes. Eighty-two percent of women said that the best way to hear about radio stations is from a friend. Women trust their friends to make recommendations; the credibility of a reference cannot be underestimated. Stations must find ways to motivate women to “tell a friend.”

However, along with being persuaded by a friend, they are likely to be persuaded by television, billboards and direct mail.



13. Almost 20% of Country women never want any contesting. Contests are very polarizing. Twenty percent never want any contesting, not even for entertainment value. A quarter (25%) “strongly agree” that they enjoy listening even if they don’t play.

Only 12% of Country radio women have listened to the radio “specifically to win” something.

Country radio listeners are slightly ambiguous in their attitude toward contests. Only 17% of them “strongly agree” they listen to radio for “Contests with a chance to win prizes.” This is lower than the average 18- to 54-year-old female diarykeeper.

Yet, 47% “strongly agree” that they “Like to win things.” This suggests that on-air contesting is not the most effective way to appeal to a Country radio listener’s desire to win. It suggests that Country radio do some serious brainstorming and rethinking about the whole issue of contests.

Contests are most attractive to 18- to 24-year-olds who are the most likely of any age group to find them entertaining and want to win something.

14. Over 80% of Country women who were contacted by a station and asked to listen for a contest actually listened. We asked Country radio listeners many questions about contests. One question asked whether they specifically listened to the radio to win something—and whether they had been contacted first and asked to listen to win.

Twenty percent of all Country radio women diarykeepers had been contacted and asked to listen to the radio for a chance to win something. Of this group, over 80% actually listened to the station after being contacted. Country women are almost three times as likely to listen to a radio station if it asks them to check it out for a contest! That is, if they are contacted.

This suggests a very strong loyalty between female Country radio listeners and their stations. They really like the connection.

It shows in their relationship with the disc jockeys and aspects of programming.

Recommendations

- 1. Carefully plan your contesting when targeting female listeners, since it can be a tune-out factor as well as a tune-in factor.** Since over 20% of women want no contests and only 17% “strongly agree” that they listen to Country radio for a chance to win prizes through contests, make sure you are doing entertaining contests if you are doing them at all. And consider a position that has no contests as part of an overall “less clutter” position, keeping in mind that the further away a diarykeeper gets from 18, the less interested she is in contesting.
- 2. Target Country radio women at work, and understand that they are responsive to direct appeals.** The working women who listen to radio are responsive to contact from stations. If you ask them to listen, they likely will; 15% want visits from station personnel; and frequent-listener clubs are strong with them.

These women are valuable, since they have a tremendous amount of TSL and they use radio to make purchasing decisions. They are an audience that will truly listen, so do not miss any opportunity to speak to them. The caution here is that your competition will be targeting them too, so you must be unique in the way you engage them.

- 3. Watch out for the Internet.** Even though the Internet can be a useful tool for your listeners, over 40% of Country radio diarykeepers don’t access the Internet. Among those who access the Internet, the majority does it from home rather than work.

So, if you’re using the Internet as an “at-work” contest hook, you are leaving a lot of your audience out. Reconsider some of the old technologies such as fax and postcards as well as direct-mail pieces if you want to make sure everyone has a chance to connect with your station.

- 4. Rethink spot loads.** How do you handle commercials at your station? They are an enormous tune-out factor for women of all ages and formats. Women tune out for irritating commercials, too. Remember the value of good creative. And remember that low-commercial and commercial-free satellite radio is coming.

Don’t shrug off this finding. Many programmers and managers tend to fall back on an “it is what it is” abdication of responsibility to their listeners. They know they have to run commercials, so they just say, “We’ll have to take what we get.”

Country radio female diarykeepers told us that you should redouble your brainstorming efforts to figure out new ways to make commercials better and reduce the number. Companies that put time, energy and effort into this area will reap big rewards.

- 5. Think about how to make your station more kid friendly.** This is a tough one since, after all, the moms are adults, and it is difficult to strike a balance between what moms like and what kids like. Just keep in mind that if she is listening at a time of day when she might be with her kids, she will turn the dial if she hears something offensive.

These diarykeepers might be a “canary in the coal mine”—warning radio to rethink community responsibilities.

6. Muzzle rude announcers if women are your target. There will always be a small group of women who enjoy rude announcers, but the majority does not—regardless of their age. There’s a big difference between “rude and offensive” and “risqué.” Some listeners will enjoy edgy humor that pushes the boundaries a bit. However, even among this group, rude announcers are a turnoff. Country radio female diarykeepers seem to have a low tolerance for this type of announcer.

7. Never underestimate the power of a recommendation from your listeners to their friends. This merits a serious brainstorm. Diarykeepers told us that the best way to reach them was by getting a recommendation from a friend.

Years ago, many radio stations took the easy way by creating “tell a friend” contests and then the fad petered out. It’s clear that this is worth thinking about again.

However, when you try to motivate their friends, remember that they are pressured for time, have very mixed feelings about contests and like to keep things simple. Your brainstorming may even turn up a way to motivate friends without turning it into a contest.

8. Give them their favorite music and identify songs and artists much more than they get now. Most Country stations focus on playing the right songs. Keep it up. However, figure out a way to identify more often than you do now.

There is historical aversion among programmers to identifying songs. They think it slows down the radio station and clutters it.

Yet 58% of female Country diarykeepers “strongly agree” that radio stations should identify songs and artists more often than they do now. This is another brainstorming area. Get your team together—try to figure out a way to identify songs more often without stopping the flow.

9. Reach out to more listeners and *ask them to check you out*. If you are thinking of doing contesting, it’s worth considering direct mail to reach Country radio listeners to ask them to listen to you—even if you don’t offer them a contest reward. They are much more likely to respond than listeners to other radio formats.

If you do contests, they should be entertaining in the briefest possible time because only one diarykeeper in 10 has listened to the radio specifically to win something. And among this small group, most have won more than once, suggesting that professional “contesting” is alive and well.

10. Work with your DJs to make them stronger. Country radio women tend to be much more positive toward DJs than diarykeepers of other formats. This can be a big strength for your radio station.

However, remember that even though Country radio listeners are more positive about DJs (especially funny ones) than the average 18- to 54-year-old diarykeeper, they don’t want too much talk.

About Arbitron

Arbitron Inc. (NYSE: ARB) is an international media and marketing research firm serving radio broadcasters, cable companies, advertisers, advertising agencies and outdoor advertising companies in the United States, Mexico and Europe. Arbitron's core businesses are measuring network and local market radio audiences across the United States; surveying the retail, media and product patterns of local market consumers; and providing application software used for analyzing media audience and marketing information data. Arbitron Webcast Services measures the audiences of audio and video content on the Internet, commonly known as webcasts. The Company is developing the Portable People Meter, a new technology for radio, TV and cable ratings.

Arbitron's marketing and business units are supported by a world-renowned research and technology organization located in Columbia, Maryland. Arbitron has approximately 750 full-time employees; its executive offices are located in New York City.

Through its Scarborough Research joint venture with VNU Media Measurement & Information, Arbitron also provides media and marketing research services to the broadcast television, magazine, newspaper and online industries.

About Joint Communications

Joint Communications Corp. is considered a global leader in media strategy, marketing and consumer trends. For 25 years, it has helped a distinguished roster of clients to achieve remarkable success. They have included VH1, *Rolling Stone* Magazine, MTV, Wendy's, S.C. Johnson, Molson, CBS, NBC, ABC, Bryan Adams, major record companies and hundreds of radio stations in the United States, Canada, Australia, Europe and South America.

Joint Communications specializes in identifying, capturing and keeping audiences. They do it through sophisticated market research, formatting, marketing and promotion.

CEO John Parikhal co-created a successful show for NBC television as well as creating national radio hits for *Rolling Stone* and NBC Radio. Most recently, he put his talents to work in helping to engineer the rebirth and extraordinary success of VH1.

Parikhal is author of *The Baby Boom: Making Sense of Our Generation at 40*, based on the most extensive study ever done of boomers as they turned 40. He earned his master's degree with media guru Marshall McLuhan and studied for a Ph.D. in language and perception.

Parikhal has been interviewed extensively on radio, television and in magazines for his opinions on what people want and why they want it. He shares his insights in his popular *Radio & Records* column, "The Competitive Edge."

Widely recognized as a futurist who helps his clients become even more successful, Parikhal says, "There is a New Entertainment Economy emerging. It's all about control, connection and convenience—a daring tug of war between consumers and creators, between the distributors and the dissatisfied."

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