

RADIO W.A.R.S.

**A study of the needs,
motivations, and attitudes
of today's radio listeners.**

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INTRODUCTION

RADIO WARS is a research study of 1,300 radio listeners across the country. Its purpose: to find out what makes listeners “tick” . . . what they need and want out of radio.

RADIO WARS answers questions crucial to you when competing in the fragmented 1980's. These days, more and more stations are going after the same “prime” demographics, often with the same format. And, increasingly, music crosses format boundaries, with some artists being played on three or even more formats.

Music alone isn't enough any more to give your station identity. And no station has a monopoly on the news or weather!

Therefore, you must turn to new ways of programming and promoting—that is, marketing—your radio station. Like consumer marketers—the sellers of cigarettes, beer and cosmetics, to name a few—you will have to appeal to the *psychology* of the consumer. You will need to communicate to listeners how your station satisfies their needs and desires.

But marketing to listeners' psychology requires that you *understand* it first. And that is the purpose of RADIO WARS. Because in the future, radio's competition will be fought in the listeners' *minds*.

Beyond the obvious programming “pieces”—the music, news and personalities that make up a radio station—what *motivates* listeners to tune in a radio station? What *personal needs* do they satisfy with radio? What *self-image* do they reinforce by listening? How much *involvement* do they have with radio?

RADIO WARS probes these important issues. It studies the psychology of listeners who prefer one of radio's nine major formats:

- ADULT CONTEMPORARY
- ALBUM ORIENTED ROCK (AOR)
- BEAUTIFUL MUSIC
- CONTEMPORARY HITS RADIO (CHR)
- COUNTRY
- FULL SERVICE RADIO
- NEWS/TALK
- NOSTALGIA
- URBAN

In *Part 1* of RADIO WARS, we compare the psychology of each format's *fans*—those listeners who name each format as their *favorite*. We'll tell you what makes them unique. How do News/Talk fans differ from all others? What makes AOR and CHR fans psychologically different? What makes Adult Contemporary fans special? And so on.

In *Part 2*, RADIO WARS takes a closer look at the audience. We'll reveal that even the fans of each format are *not all alike*. Instead, they break into “segments” or groups of listeners with different motivations and programming preferences . . . listeners you can get in different ways. Part 2 describes each format's segments and gives you some ideas on how to go after them.

Part 3 tells what RADIO WARS means to you. It gives you a guide for applying the “segmentation” approach to marketing your station.

Part 4 gives you some key data tables, so you can see how the fans of your format answered RADIO WARS questions.

PART 1

Overview of the Formats

In this section, we compare the formats...telling you what makes each format's fans different and similar to the fans of other formats. When you read this section, keep in mind that we're talking about each format's fans in general terms, as a *group*. What we say may not be true of all of them, because even among the fans of each format, there are different segments of listeners with unique preferences and psychology...differences we'll explore in Part 2.

Radio plays a major role in the lives of most listeners. Almost three-fourths agree that "something very important would be missing from life" if they didn't have radio...49% agree "strongly!" And radio is not merely a "background" for the vast majority...in fact, 76% agree that they pay "a lot of attention" when they listen...44% agree strongly.

Most listeners are involved with radio...it serves a multitude of their psychological needs.

But each format's fans have unique needs and desires...finding them out is what RADIO WARS is about. Later, we'll even show how the fans of each format are themselves not all alike!...that they are made up of distinct "segments" of listeners you can reach in different ways.

First, we'll take you on a "trip" through the formats...from the more peer-oriented—AOR fans—through the radically different "stimulation-seekers"—the News/Talk and Full-Service fans.

Today's AOR FANS are hardly anti-social or non-conformists, as some people believe. In fact, they are radio's most socially-motivated listeners! More than any other format group, they feel that listening to radio "adds to the fun" when they're with others. And more than any others, they agree they like to listen to the same station as their friends.

AOR fans think of themselves as "avant-garde"...their ideal radio station would be unpredictable, anti-establishment and trendy. More than any others, they say they are the first to try new stations.

And AOR fans think of themselves as "music experts" who know more about music than other people. More than any others, they listen to the radio *only* for music...to learn about music and keep up with the *latest* music.

But despite this hip, trendy image, AOR fans are conservatives where it matters most...in their music preferences. They still like "traditional" Hard Rock much more than New Wave music. And they dislike Urban music.

Like AOR fans, CHR FANS want an unpredictable, trendy-sounding station. They, too, listen to keep up with the music. But CHR fans have less *ego-involvement* in radio. They don't think of themselves as music "experts." Fewer claim to be "the first" to try new stations. And their listening is less influenced by other people.

Compared to AOR fans, CHR fans' listening is more *personal*, more one-on-one. As a group activity, it's less important. They want *companionship* from radio. That may be why they like jocks that seem like "friends" and "funny dj's" more than AOR fans or anyone else.

CHR fans' music tastes are far more *balanced*...they like soft as much as Hard Rock and they like Urban music far more than AOR fans do. And unlike AOR fans, they listen for *songs* far more than for performers.

Radio plays a different role in the lives of URBAN FANS than their rock counterparts. Urban fans see it as something they can "look up to." Radio is a *role model* for them...something they can admire and aspire to. Perhaps that is the reason radio is so important to Urban fans. They are radio's heaviest listeners, and when they listen they pay a lot of attention.

Another main characteristic that makes Urban fans unique is the way they use radio for *mood*. More than any other listeners, they use radio to *change* their mood—to put them in a different mood than the one they're in. Urban fans especially use radio to cheer them up, but they also listen to feel lively or to calm down to take

their mind off problems or make them think...what-ever they want at the time.

In contrast to Urban fans, ADULT CONTEMPORARY FANS want a station that doesn't *demand* too much of their attention...a cheerful "companion" that avoids obtrusiveness of any kind.

A/C fans are less involved with radio than the rest of the audience...it is less important to them. They listen less than average, and of all formats' fans, they would miss radio *least* if it was gone! Radio is more of a background for them than for others...a soundtrack for their busy lives. Only Beautiful Music fans pay less attention when they listen.

A/C fans are not "music experts," nor do they try to be. Their ideal station would be safe, predictable and familiar. It would play a lot of oldies and avoid "spicier" kinds of music like Hard Rock and Urban.

This "moderation" is the key to A/C radio's success...because it's not objectionable to fans of most other formats, it gets the most "crossover" listening. In fact, A/C has the highest listening of any format we tested. But at the same time, relatively few name it as their favorite.

Just a couple of things make COUNTRY FANS unique. One, their values. Country fans want a more traditional, more "folksy" station than other listeners. Secondly, their loyalty. More than other listeners, it would "take a lot" to switch them from their favorite. They "tune around" less than other listeners do.

The psychology of BEAUTIFUL MUSIC FANS is a major revelation. They are NOT uninvolved with radio! Radio is not merely a "background appliance" to Beautiful Music fans...they are *emotionally involved* with it.

As much as all other listeners, Beautiful Music fans feel something "very important" would be missing from their lives without radio. They do pay attention to radio. Of course, they do listen "to relax," but even more, radio is also a *companion* to them...it keeps them company and cheers them up.

How can an automated radio station be a companion? Because it is *music*, not talk, that keeps Beautiful Music fans company. In fact, the only talk they really want, is a bit of news...they don't want dj's trying to "entertain" them.

Beautiful Music fans are among radio's most loyal listeners. Their stations let them escape the jocks, the rock, the contests, the jingles and everything else they don't like.

NOSTALGIA FANS are the older generation's "music aficionados." While they share many attitudes with the Beautiful Music fans—their demographic peers—Nostalgia fans think more. They have stronger attitudes about music. And they pay even more attention to radio.

Amazingly, Nostalgia fans *think* a lot like AOR fans! Like AOR fans, they think they know more about music than the average person, they are opinionated about music, and they are about as equally interested in *performers* as in *songs*.

Unlike their Beautiful Music counterparts, relaxing is not important to Nostalgia fans...they want to feel more lively. And they want more stimulation from radio and are more interested in news and personalities.

More than any other listeners, their ideal station would be "on their level," rather than an authority figure. Radio is like a good friend to Nostalgia fans, sharing memories and music from the past.

In contrast, radio *is* the authority for NEWS/TALK FANS...like someone serious they can "look up to." They are radio's most unique listeners. Unlike all others, they don't listen to be "cheered up," "unwind" or take their minds off problems...they listen to *engage* their minds.

No other listeners pay more attention to radio. News/Talk fans listen to *think* and to *learn*...to learn practical things to make life better and to learn what others feel and think. Learning these things feeds their self-image as "experts" on news—they feel they know more about news than other people. And they listen to maintain that "edge"...to learn things they can use to impress others.

Their News/Talk authority makes them feel like part of their community. It also *reassures* them...they listen to make sure nothing is happening which could hurt them or loved ones. Radio is like a "security blanket" they can tune into anytime.

But that doesn't mean News/Talk fans want "happy news." In fact, they want their station to investigate and expose corruption, not necessarily go out of its way to cover "pleasant things." News/Talk fans don't listen to

escape reality...they seek out the stimulation reality brings.

While many "Full-Service" stations call themselves "Adult Contemporary," *FULL-SERVICE FANS* are radically different from A/C fans. In reality, they are a psychological "hybrid" of the News/Talk and music fans, but much more like the "News/Talkers!"

The difference is mainly of *degree*. Full-Service fans seek the same intellectual stimulation that News/Talk fans do—practical information, community involvement, self-esteem and things to think about. They just don't feel quite as strongly about these things.

Like music fans, one of the main reasons they listen is for companionship...not a major motivation for News/Talkers. And they listen to be cheered up, while News/Talk fans don't want to be cheered up. Their ideal station would be cheerful, while News/Talk fans want a serious station.

Unlike both News/Talk fans or fans of any music format, Full-Service fans listen for *personalities* as well as news and music. They want much more personality talk than music format fans, and more entertaining, "fun" talk than News/Talk fans.

For Full-Service fans more than any others, it is important for a station to have *both* news and music,

PART 2

Taking a Closer Look At the Audience

In Part 1 of this report, we looked at the fans of each format *as a group*, discovering how they compare to other listeners. But RADIO WARS reveals that when we take a closer look, we find that even listeners who share a favorite format have important differences. Each group of format listeners contains different groups or "segments" of listeners with unique attitudes, programming preferences and reasons for listening to radio.

For example, think about a city...like Chicago. We can talk about what Chicagoans are like, overall...that they're politically liberal and avid sports fans. But not *all* Chicagoans are like that...there are areas of the city that are very conservative and Chicagoans who couldn't care less about the Bears or the Black Hawks.

Fans of radio formats are the same way. For example, we've said that, overall, Country fans are loyal and

don't switch around a lot. But one segment of Country fans is different...they do switch around and aren't particularly loyal. We call this group the "Hip Switchers."

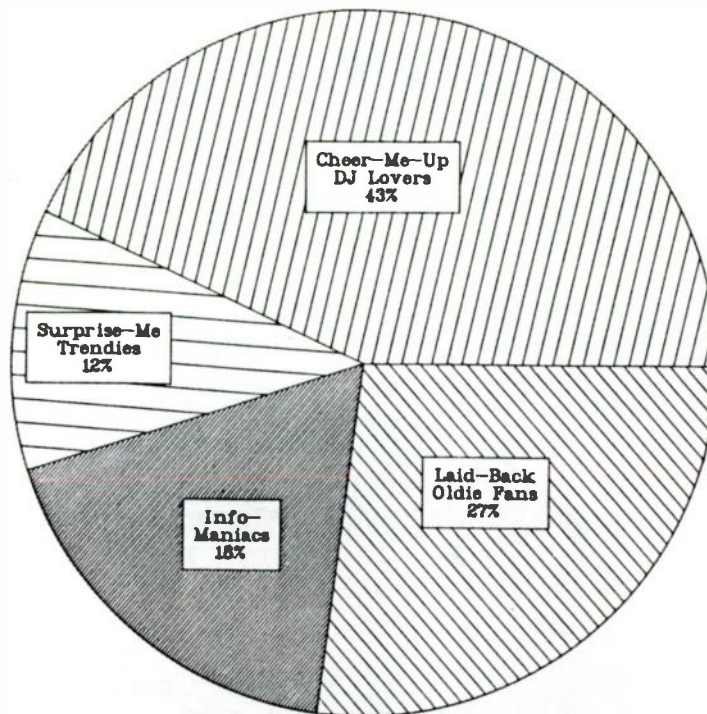
AOR fans listen for music alone, overall, more than any other group. They don't want much talk or news. But one segment *does* care a lot more about personalities, especially funny ones. We call them "DJ and Dinosaur Lovers." We'll tell you about all the formats' segments in this section.

The fact that segments can be so different leads to one of the most important findings of RADIO WARS...that there is no *one* audience for any format. There are four kinds of Adult Contemporary fans, three kinds of Nostalgia fans, six kinds of AOR fans, and so on. Understanding this fact is crucial to marketing your station in the 1980's.

ADULT CONTEMPORARY SEGMENTS

As a total group, Adult Contemporary fans are not deeply involved with radio...they want a cheerful, predictable-sounding station without the "hard edges" that demand their attention. But when we take a closer

look at the "Adult Contemporaries," we discover that there are really *four* kinds of A/C fans. Each is different, and each requires a different programming and advertising strategy.



The “*Cheer-Me-Up DJ Lovers*” listen to be cheered up and forget their problems, and personalities help them do that. They’re the most enthusiastic and involved A/C fans.

The programming they want:

Uptempo music... funny, friendly personalities... contests, because they’re the only A/C fans that like them.

A message that would motivate them:

Show them how your station can change their mood... how it helps cheer them up and forget their problems.

The “*Laid-Back Oldie Fans*” seek companionship from radio. But it’s music, not talk, that keeps them company.

The programming they want:

Laid-back and soft, with very little news or dj talk. Musically, be predictable and familiar, with lots of “oldies”... they think today’s music isn’t as good.

A message that would motivate them:

Communicate that your station “keeps them company” with music, not talk.

The “*Info-Maniacs*” listen for intellectual stimulation

...they think they know more about news than most people.

The programming they want:

Give them a lot of news and information, including talk shows. Emphasize information, more than entertainment, in all on-the-air talk. Musically, keep it soft and familiar.

A message that would motivate them:

Appeal to their sizeable egos... tell them how “smart” people, “people who really know what’s going on,” listen to your station.

The “*Surprise-Me Trendies*” are a “fringe” A/C group... the musically “hip.” They think they know more about *music* than most people.

The programming they want:

Cut news and talk to the barest minimum. Be uptempo, play a lot of new music and few oldies. Avoid crossover country, play a bit of Urban music and be a bit “harder” than the typical A/C. Be trendy, sophisticated, and anti-establishment.

A message that would motivate them:

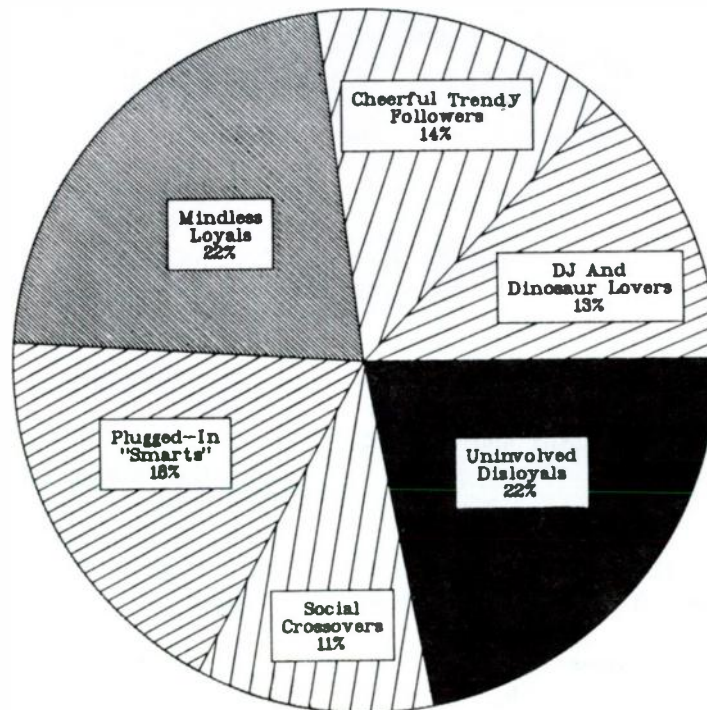
Position your station as the one for people “who really know their music.”

AOR SEGMENTS

Overall, AOR fans like to listen with their friends and “follow the crowd” more than any other listeners. They think of themselves as “music experts” and listen *only* for music. While they say they want an unpredictable, anti-establishment and trendy-sounding station, they’re

musical conservatives who still like “traditional” rock better than New Wave.

But all AOR fans are *not* alike...there are *six* kinds of AOR fans and you can reach each differently...



The “*DJ and Dinosaur Lovers*” love funny personalities who make them think. And they are the most musically conservative AOR fans...they think the music was better years ago.

The programming they want:

Keep your music heavy and *hard!*, with a lot of “classic” rock. Give them funny, irreverent dj’s, a lot of news and information, and even a talk show.

A message that would motivate them:

Feature your personalities.

The “*Uninvolved Disloyals*” aren’t emotionally involved with radio...they listen strictly for music. Their music tastes are a bit “softer” than those of other AOR fans.

The programming they want:

Avoid “buzzsaw” rock and include some of the “hipper” A/C groups. Keep your news and talk brief and straight.

A message that would motivate them:

Appeal to their negative psychology...tell them you don’t have what they don’t like—contests, jingles or “silly” dj’s—just “rock for ‘grown-ups.’”

The “*Social Crossovers*” are “followers” searching for a leader...they want a station they can “look up to.” Like the “*Disloyals*,” they have “mellow” music tastes.

The programming they want:

Keep your music familiar, predictable and avoid the real

“hard stuff.” Make your station seem big and powerful, an “authority” on music and news.

A message that would motivate them:

Position your station as the one “to listen to with your friends.” Tell them you are “Number One,” if possible.

The “*Plugged-In Smarts*” think of themselves as hip, trendy, intelligent people who know more about music and news than most others.

The programming they want:

A sophisticated, trendy, unpredictable station with lots of new music, including some New Wave. Cultivate an “anti-establishment” image.

A message that would motivate them:

Position your station as the one for “thinking people.”

The “*Mindless Loyals*” listen so they won’t have to think! They want radio to help them forget problems and cheer up.

The programming they want:

Give them little news or dj talk. Be very uptempo and play a lot of new music, including some New Wave. Contests are O.K. but jingles are not.

A message that would motivate them:

Tell them your station “takes your mind off problems.”

Even more than any other AOR fans, the “*Cheerful Trendy Followers*” listen to “follow the crowd.” They want a lively station that “gets them up!”

The programming they want:

Give them the same music as the “*Mindless Loyals*,” then add jingles and heavy contesting. Your jocks should be super-cheerful when they talk, which isn’t often.

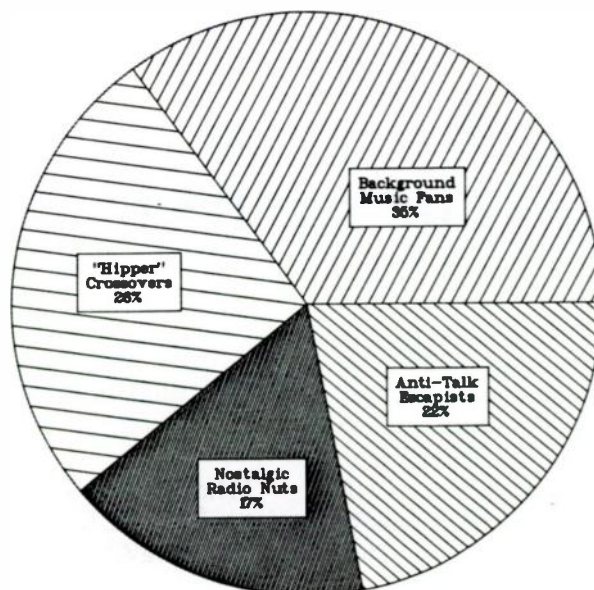
A message that would motivate them:

Position your station as the one to listen to “with your friends,” because they like to “follow the crowd” and listen with others.

BEAUTIFUL MUSIC SEGMENTS

When we look at all Beautiful Music fans together, we discover they are involved with and loyal to their radio stations, just like other listeners! They do pay attention to radio...even more than relaxing them, radio cheers

them up and keeps them company. But not all have the same motivations and preferences...a close look reveals that there are *four* kinds of Beautiful Music fans...



The “*Background Music Fans*” are the most “traditional” Beautiful Music fans. They listen for companionship and are very loyal to their favorite, but they don’t pay much attention when they listen. More than any other Beautiful Music fans, they want a station that’s “on their level.”

The programming they want:

Be very laid-back, with lots of traditional, older tunes. Play it “straight” and informative when you talk, which is rarely.

A message that would motivate them:

Position your station as a “relaxing companion” that’s been “like a friend” for years.

The “*Anti-Talk Escapists*” listen to “cheer up” and forget their problems.

The programming they want:

Give them very little news—it depresses them—and even less “fun” talk. Play mainly older tunes but blend in some that are more contemporary. Make all ID’s sound extremely cheerful.

A message that would motivate them:

Position your station as “the place to escape” from life’s problems.

The “*Nostalgic Radio Nuts*” are Beautiful Music’s radio lovers...they love everything about it, not only music. They are “close cousins” of Nostalgia fans... they love Big Band music.

The programming they want:

Give them live personalities, jingles and even contests! Musically, give them a blend of Big Bands, MOR and Beautiful Music.

A message that would motivate them:

Tell them your station has great old songs and stars that “bring back memories.”

The “*Hipper Crossovers*” are the most “contemporary” Beautiful Music fans. They listen to “cheer up.”

The programming they want:

Give them a blend of soft A/C currents and oldies along with instrumentals of old and new tunes. Develop a solid news image and have live personalities in limited doses. Be a bit livelier than most Beautiful Music stations.

A message that would motivate them:

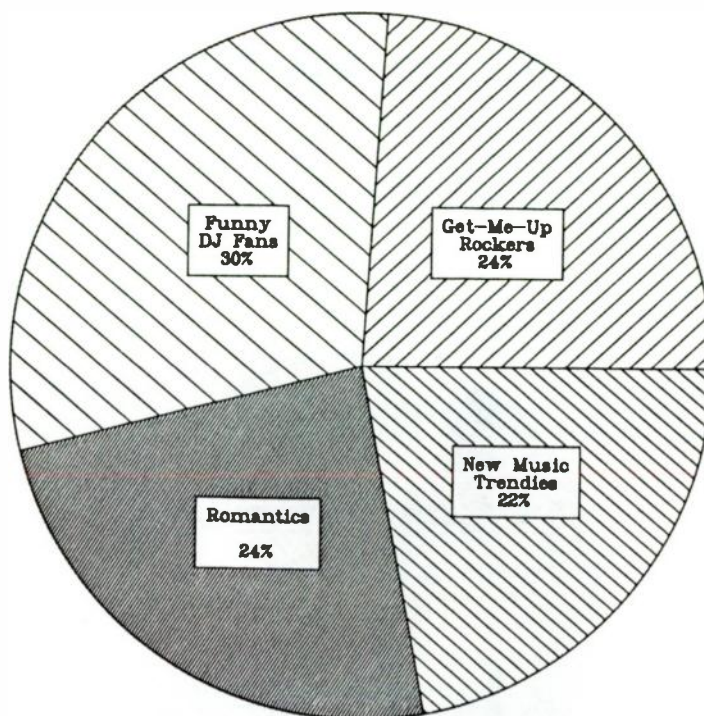
Position your station as the one that “gets you in a happy mood.”

CHR SEGMENTS

Overall, CHR fans are a lot like AOR fans in why they listen and what they want—a trendy, uptempo station with a lot of current music and not much news or talk. But radio is more of a personal experience for CHR fans...it doesn’t involve other people or their opinions as much. CHR fans’ musical tastes are broader. They

don’t think of themselves as “music experts.”

When we take a closer look, we find that there are *four* kinds of CHR fans. You can reach each one in a different way...



The “*Get-Me-Up Rockers*” are the most enthusiastic and loyal CHR fans...they listen to feel lively and sociable.

The programming they want:

Give them an uptempo station that plays the “hits!”... don’t emphasize new, unfamiliar music. Keep it “hard” and play a lot of Urban as well. Minimize jock talk and news. Do contests but omit jingles.

A message that would motivate them:

Position your station as the one that “gets you up!”

The “*New Music Trendies*” think all stations sound alike, so they switch around to keep “on top” of music.

The programming they want:

Give them a super-lively, cheerful, trendy sound...not so much hard as *up*! Play few or no oldies. Minimize jock talk and news.

A message that would motivate them:

Tell them your station helps them “keep up” with music.

The “*Romantics*” listen to “feel good”...among other things, they listen to get in a romantic, nostalgic mood. They are the most “laid-back” CHR fans.

The programming they want:

Give them a lot of oldies and avoid the really “hard” stuff. Have high-profile jocks, a lot of news, and contests.

A message that would motivate them:

In advertising, tell them your station makes them “feel good.”

The “*Funny DJ Fans*” listen to laugh and cheer up. More than other CHR fans, they want a folksy station that’s “on their level.”

The programming they want:

Give them funny, unpredictable folksy jocks. In addition, play familiar music that’s “up” but not “hard,” with a lot of oldies...unlike other CHR fans, they don’t care about keeping up with music. Do brief news updates regularly.

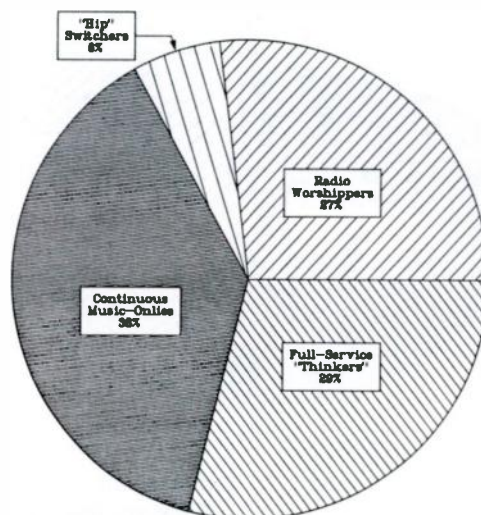
A message that would motivate them:

Tell them how your personalities “cheer you up.”

COUNTRY SEGMENTS

Overall, just a few things make Country fans unique. They are more folksy, traditional and loyal to their favorite station than others are. But not all Country

fans are alike. In fact, there are *four* kinds of Country fans, and you need a different approach for each one...



"Radio Worshipers" are the most involved Country fans... they "look up to" radio and love almost everything about it. They are heavy listeners with many motivations for listening.

The programming they want:

Give them folksy, cheerful personalities, solid news, talk shows and contests. But keep the emphasis on music—familiar and mainly current music.

A message that would motivate them:

Tell them your station "keeps you company all day."

The *"Continuous Music-Onlies"* are just the opposite... all they want is music. They are less involved with radio than other Country fans.

The programming they want:

Keep news and especially dj talk to a minimum. Keep your music predictable and familiar, with heavy emphasis on "modern" Country.

A message that would motivate them:

Emphasize "continuous music" and/or "less talk."

The *"Full-Service 'Thinkers'"* listen for mental stimulation, not just music... radio gives them things to think about. They want more personality talk, news and services than other Country fans.

The programming they want:

Give them lots of news and talk, including call-in talk and sports. Be folksy, cheerful and a bit unpredictable. Musically play more old than current songs.

A message that would motivate them:

Be the Country station with "more than just music" for "people who think."

The *"Hip Switchers"* are a lot like AOR fans, Country-style. They think they "know" music and listen to "add to the fun" with others.

The programming they want:

Give them "continuous" Country with little talk or news, but play a lot of new, unfamiliar music. Adopt a trendy, more sophisticated style.

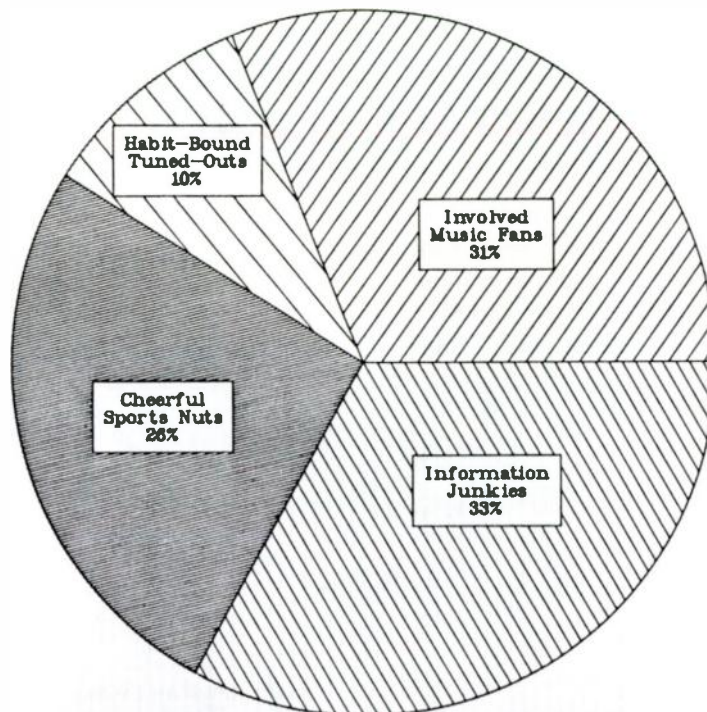
A message that would motivate them:

Position your station as the one for people who "know their music."

FULL SERVICE SEGMENTS

As a group, Full Service fans are a psychological “hybrid” of the News/Talk and music fans... they seek the same intellectual stimulations as News/Talkers fans and the same “good feelings” from radio as music for-

mat fans. But when we take a closer look, we discover there are *four* different kinds of Full-Service fans... some are more like News/Talk, while others are more like music fans...



The “*Involved Music Fans*” love *everything* about radio. They are a true Full-Service “hybrid”...radio cheers them up *and* makes them think.

The programming they want:

Give them a multitude of features and services. Do contests, sports and call-in talk shows, along with a lot of services. Musically, be traditional...play mainly MOR with little contemporary.

A message that would motivate them:

Tell them about all your features and how they affect their lives...for example, “news that makes you think,” “music and personalities that cheer you up,” etc.

The “*Information Junkies*” are “close relatives” of News/Talk fans. They’re the most serious, listening almost exclusively to think and learn.

The programming they want:

Give them in-depth news reporting, and a lot of call-in talk. Also have non-news personalities who play it fairly straight. The little music you play should be mainly MOR...don’t play much contemporary.

A message that would motivate them:

Position your station as the one for “people who know what’s going on.”

In contrast, the “*Cheerful Sports Nuts*” are the most “folksy” Full-Service fans...they listen for sports and companionship, not to learn.

The programming they want:

Be laid-back and cheerful. Play a lot of music, mixing MOR and more contemporary sounds. Have a lot of “good news” and, of course, live sports. Emphasize light topics on your talk shows. Use jingles.

A message that would motivate them:
Tell them your station “keeps them company.”

The “*Habit-Bound Tuned-Outs*” are the least involved listeners. . . they listen mainly for a quick wrap-up of the news.

The programming they want:
Be traditional and predictable, but lively. Put more em-

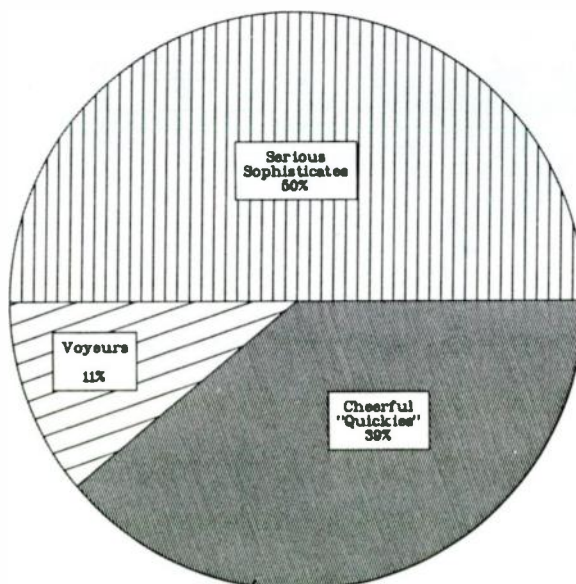
phasis on contemporary “oldies” than MOR. Have short newcasts and almost no dj talk. Have very few features, just music and news.

A message that would motivate them:
They don’t respond to emotional appeals, so just tell them about your programming.

NEWS/TALK SEGMENTS

Radio serves as an “authority figure” for News/Talk fans. . . it reassures them, teaches them and makes them think. News/Talk fans think of themselves as “experts” on news. . . they seek mental stimulation, not “good

feelings” from radio. There are *three* kinds of News/Talk fans. . . each has a different reason for listening and requires a different marketing strategy.



Half of the News/Talk fans are “*Serious Sophisticates*” . . . more than any other listeners, they listen exclusively to think and learn. Even more than other News/Talk fans, they want a radio station that “rocks the boat.”

The programming they want:
Give them serious news and in-depth analysis. Start up an “investigative” unit to uncover corruption in business and government. When you do, promote it heavily. Avoid light talk and “soft” human interest features.

A message that would motivate them:
Position your station as the one that “takes news seriously” for “people who know their news.”

The “*Cheerful 'Quickies'*” are News/Talk’s “hit and run” fans. . . they listen to get a quick update on the news.

The programming they want:
Give them a cheerful, laid-back, folksy-sounding sta-

tion with a lot of light talk and features. Put top stories in "hot rotation."

A message that would motivate them:

Position your station as the one to turn to when you want the news fast. For example, "Give us 18 minutes and we'll give you the world."

The "Voyeurs" are the "Peeping Toms" of radio... they listen to "eavesdrop" on other peoples problems! In addition to News/Talk, they're heavy Country radio

listeners who *pay attention to the words*... songs about divorce and drinking clearly appeal to their psychology!

The programming they want:

Give them more talk shows than straight news... preferably featuring psychologists, doctors, lawyers and sex therapists. Your experts should be cheerful and folksy, but very authoritative.

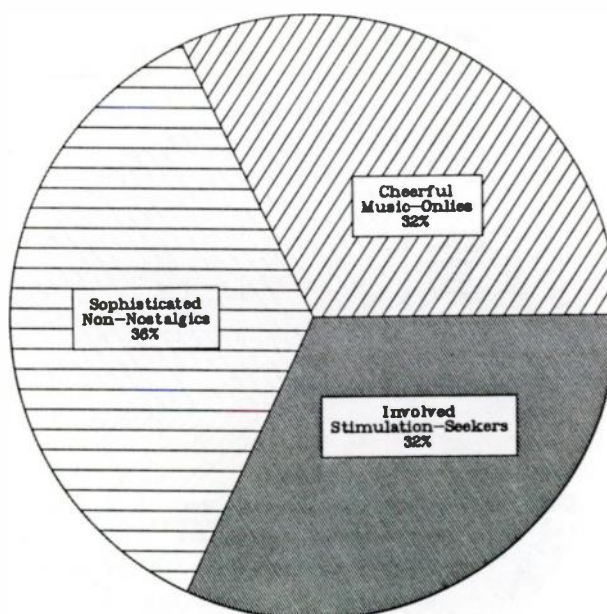
A message that would motivate them:

Tell them your station will make them "a more interesting person."

NOSTALGIA SEGMENTS

As a group, Nostalgia fans are the older generation's "music experts"... they're more interested in music than their Beautiful Music peers. They want more mental stimulation than Beautiful Music fans do. Most

listen to radio to "bring back memories" of the past... but not all do! In fact, there are *three* kinds of Nostalgia fans. You can reach each one differently...



The "Cheerful Music-Onlies" are the most loyal Nostalgia fans. They seek companionship and "memories" from the music itself, not dj talk. Even more than other Nostalgia fans, they feel music "isn't as good as it used to be."

The programming they want:

Have virtually no jd talk... they hate it more than *any* other segment! Have some news but not a lot. Your

music should be laid-back and very familiar... more than other Nostalgia fans, they listen for certain songs they know.

A message that would motivate them:

Tell them your station plays the kind of music "they just don't make anymore"... music that brings back good memories.

The “*Involved Stimulation-Seekers*” are Nostalgia’s “thinkers.” They want to be mentally stimulated as well as “cheered up” by radio.

The programming they want:

Give them a lot of news, even talk shows, but not much dj talk. Concentrate exclusively on the old music... avoid more contemporary songs.

A message that would motivate them:

Tell them your station makes them “happier and smarter.” The “nostalgic” approach—music that “brings back memories”—will also work for these listeners.

It won’t work with the “*Sophisticated Non-Nostalgics*”... these self-styled “music experts” love the music but *not* the memories.

The programming they want:

Give them more uptempo music and jocks that play it straight and sophisticated. Don’t give them a lot of news.

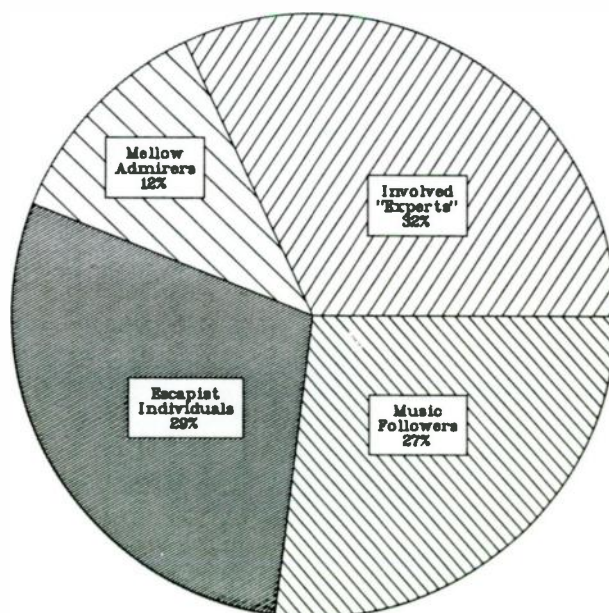
A message that would motivate them:

Position your station as the one for “people who know music.”

URBAN SEGMENTS

Urban fans are psychologically unique in two major ways... One is the way radio is a “role model” for them—something they look up to and admire. Another is the way they use radio to *set a mood*... to get them in

the mood they want to be in. But when we take a closer look, we find that there are really *four* kinds of Urban fans you can reach in different ways...



The “*Involved 'Experts'*” are Urban’s egotists... they think they know more about news and music than others.

The programming they want:

Give them a healthy dose of news and call-in talk, but

not much dj talk. Play mainly current songs and few oldies. Do contests that require knowledge.

A message that would motivate them:

Position your station as the one where “smart people keep up with what’s going on.”

The “*Music Followers*” are the most “trendy” Urban fans...they listen to keep up with the latest music and *only* for music.

The programming they want:

Cut your news and talk “to the bone” for them. Be trendy, cheerful and very untempo. Stick mainly to current songs, not oldies, and avoid any kind of rock. Do a lot of contests.

A message that would motivate them:

Tell them your station is the place to “keep up with music.”

“*Escapist Individuals*” listen to take their minds off problems...radio gives them a “lift.” They “go it alone” when picking a station.

The programming they want:

Give them a lot of oldies and information but not much dj talk. Be traditional, sophisticated and a bit laid-back.

A message that would motivate them:

Position your station as the one that helps them forget their problems.

The “*Mellow Admirers*” are the most laid-back Urban fans. Even more than any other Urban fans, they want a station they can “look up to” and admire.

The programming they want:

Give them a relaxing sound with more oldies than current hits. Avoid a lot of news and dj talk. Be like Walter Cronkite—folksy but serious.

A message that would motivate them:

Position your station as “the leader”...a station people look up to and admire.

PART 3 SUMMING UP

RADIO WARS MEANS A NEW WAY TO PROGRAM AND PROMOTE

When looking at the findings of RADIO WARS keep in mind that it may not reflect *your* situation. For example, your market and format may include some different audience segments than we found. Or the segments in your market may be different in size and proportion.

The real purpose of RADIO WARS is to give you a new *perspective* on marketing your radio station...

A New Way Of Understanding The Audience

What do the findings of *RADIO WARS* mean for the all-important management challenges of programming and promoting radio stations?

First of all, RADIO WARS confirms what you as radio broadcasters may have suspected all along: the fans of your formats are *different*—not just different in age,

sex, or income, but different *psychologically*. The “mind set” of Adult Contemporary fans is different from the “mind set” of Full Service fans which is different from the “mind set” of AOR fans. And so on.

Programming to your format’s fans goes beyond just programming different music. It means serving different audience “needs.” It means communicating a different kind of total station image.

But more important, *RADIO WARS* makes a crucial point: *the fans of your format are themselves very different from one another*. For example, Adult Contemporary fans aren’t one audience; they are really *four* distinct segments, each a special audience in its own right. One wants to be cheered up by dj talk, contests and uptempo music. Another wants a laid-back sound with very little talk. The third group listens to think...

they want a lot of news and information. And the fourth think they're "hip" and want a lot of new, unfamiliar music... something that would "turn off" the other three!

The Ultimate Management Decision: Picking An Audience Target

When you face the challenge of fine-tuning an existing format or picking a brand new one, you don't have one audience option, you have several. Your decision used to be: Which format should I be? Adult Contemporary, Country, Full Service, or something else? Now, in the face of increasing competition, your decision has to be: What *kind* of A/C should I be? Or what *kind* of Country should I be? In other words, exactly which *segment* should I target?

RADIO WARS makes it clear that choosing the right segment, or combination of segments, can be the most vital management decision your station makes. Make the wrong decision, and your station can "lose the battle." Some examples:

- A "mellow" A/C station hires a high-profile morning jock and promotes him heavily. Its ratings go down. Why? The audience was mainly the "Laid-Back Oldie Fans," who dislike personalities and don't listen for them. It loses this "core" without attracting the "Cheer-Me-Up DJ Lovers," who are loyal to another, more uptempo A/C.
- A News/Talk station adds a lot of soft, "human interest" features. Its ratings drop. Why? While it does pick up the "Cheerful Quickies," who like cheerful, folksy features, it loses the "Serious Sophisticates," a much larger segment.
- A Country station positions itself as the one "for people who *know* their Country Music." Its ratings drop. Why? Most country listeners don't feel that they do. It picks up the "Hip Switchers," a small fraction of the Country core, but it loses more listeners in the other three Country segments. They take the message to mean a "hip," sophisticated Country station... something they don't want.

- A Beautiful Music station advertises itself as "the station for lovers." Nothing happens. Why? *No* Beautiful Music segment listens to get "in a romantic mood."

In short, *RADIO WARS* reveals that a station's key management decision is "which segments do I go after?" and that means answering these crucial questions...

1. Who are the different audience "segments" that might listen to my format or the formats I'm considering?
2. How large is each segment?
3. Which segments do I have now? What do they like and dislike about my station? How loyal are they?
4. Which segments can I get? What do they like and dislike about my station and the competition? How vulnerable are they?
5. Are there any "voids" in the market... segments that *no* station is serving? Can I get them?

Once you answer all of these questions pick your targets... the segment or segments you can get. Be realistic. Understand that if two segments have dramatically different needs and desires you can only hold both in the absence of competition. Don't go after segments you can't get, because they are loyal to another station. Consider the trade-offs of any strategy... which segments you can get and which you may lose.

Once you have picked your targets, define your strategy. Give them the programming they want and advertise to their motivations.

RADIO WARS reveals that the battle for the radio audience has entered a new era. Winning that battle means going well beyond demographics. Now, "serving the audience" means understanding the fact that there is *no one audience*—not even for one format. There are, instead, many audiences. No one station can serve them all; each station must decide which audience it wants and then "target in" on it.

PART 4

The Data

This section includes the data tables comparing each format's fans on all RADIO WARS questions. Just look down the column with your format's fans to find out how they answered.

How to Use Them

RADIO WARS uses a number of different *average rating scales* to determine listener behavior and psychology. They give you the average or "mean" score of each format's fans responses to different questions. For example, there are AGREE/DISAGREE scales...

Disagree Strongly		Agree Strongly
1.0	4.0	7.0

The numbers on this page tell you how much each format's fans *agree* or *disagree* with the statements given, averaging all of them together. A "7" corresponds to "agree strongly," and a "1" corresponds to "disagree strongly." The higher the number, the more they agree, the lower the number the more they disagree. A "4" is neutral.

We also use LISTENING scales to determine how often listeners listen to each kind of radio station...

Never	Always
1.0	7.0

On these scales a "7" means they "always" listen to that format and a "1" means they "never" listen to it. The higher the number the more they listen.

A different kind of scale is used to determine listeners' IDEAL STATION. Here we give them two choices... for example, we ask them if their "ideal" station would be more "cheerful" or more "serious"...

Cheerful		Serious
1.0	4.0	7.0

A "7" means their station would be "a lot more serious," while a "1" means it would be "a lot more cheerful." A "4" means it would be "in-between."

On the "ideal station" tables, words on the left side always correspond to "1" and words on the right side correspond to "7." For example in the choice between...

More Current Songs vs. More Older Songs

A "7" would mean they want a lot more "oldies" than "currents," a "1" would mean they want a lot more "currents" than "oldies," and so on.

NEEDS AND BELIEFS: AVERAGE RATING SUMMARY

Disagree Strongly		Agree Strongly							
1.0		4.0	7.0	TOTAL	ADULT CONTEMPORARY	ALBUM ORIENTED ROCK	BEAUTIFUL MUSIC	CONTEMPORARY HIT RADIO	COUNTRY
<u>How much do you agree or disagree with the following statements?</u>									
<u>EMOTIONAL GRATIFICATION</u>									
The main reason you listen to radio is that it keeps you company when you're lonely				5.6	5.5	5.5	5.5	5.8	5.7
You listen to radio mainly because it helps cheer you up and get you into a happy mood				5.6	5.5	5.9	5.4	5.9	5.8
You listen to radio mainly to make you feel lively when you need a lift				5.1	5.1	5.5	4.6	5.6	5.1
You listen to radio mainly to calm down and unwind when you feel tense				4.8	4.7	5.1	5.0	5.2	4.8
The main reason you listen to radio is to take your mind off your problems and situations				4.3	4.3	4.7	4.1	4.5	4.3
You listen to radio mainly to help you work better or faster				4.3	4.0	4.8	3.8	4.6	4.4
The main reason you listen to radio is to "bring back memories" of a specific time, place or event				3.5	3.2	3.3	4.0	3.4	3.6
You listen to radio mainly to get into a romantic mood				2.9	3.1	3.5	2.4	3.3	2.6

Average ratings calculated only among those who had an opinion.

NEEDS AND BELIEFS: AVERAGE RATING SUMMARY (cont'd)

Disagree Strongly	Agree Strongly		TOTAL	FULL SERVICE	NEWS/TALK	NOSTALGIA	URBAN
1.0	7.0	4.0					
<u>How much do you agree or disagree with the following statements?</u>							
<u>EMOTIONAL GRATIFICATION</u>							
The main reason you listen to radio is that it keeps you company when you're lonely			5.6	5.4	4.9	5.7	5.8
You listen to radio mainly because it helps cheer you up and get you into a happy mood			5.6	4.8	3.8	5.2	6.4
You listen to radio mainly to make you feel lively when you need a lift			5.1	4.3	3.6	4.7	5.9
You listen to radio mainly to calm down and unwind when you feel tense			4.8	4.0	3.7	4.2	5.5
The main reason you listen to radio is to take your mind off your problems and situations			4.3	3.7	2.8	4.2	5.0
You listen to radio mainly to help you work better or faster			4.3	3.7	3.3	3.8	5.3
The main reason you listen to radio is to "bring back memories" of a specific time, place or event			3.5	3.5	2.9	4.9	3.8
You listen to radio mainly to get into a romantic mood			2.9	2.3	2.1	2.8	3.6

Average ratings calculated only among those who had an opinion.

NEEDS AND BELIEFS: AVERAGE RATING SUMMARY (cont'd)

Disagree Strongly 1.0	4.0	Agree Strongly 7.0	TOTAL	FULL SERVICE	NEWS/TALK	NOSTALGIA	URBAN
<u>How much do you agree or disagree with the following statements?</u>							
<u>SOCIAL GRATIFICATION</u>							
You think listening to radio really adds to the fun when you're with other people			4.9	3.5	3.1	4.2	6.0
You feel that what you learn from radio makes you more interesting to other people			4.3	5.1	5.7	4.6	4.5
You listen to the same radio stations as your friends do			3.8	3.3	3.6	3.6	4.2
The main reason you listen to radio is to get music to dance to			3.3	2.2	2.2	3.0	5.0
<u>INTELLECTUAL GRATIFICATION</u>							
The things you hear on radio really give you a lot to think about			4.9	5.7	6.1	4.5	5.7
The main reason you listen to radio is to feel more like a part of your community			3.5	4.7	5.0	3.7	3.7
The main reason you listen to radio is to get practical information about things like health, money and the law			3.4	4.5	5.5	3.8	4.4

Average ratings calculated only among those who had an opinion.

NEEDS AND BELIEFS: AVERAGE RATING SUMMARY (cont'd)

Disagree Strongly 1.0	4.0	Agree Strongly 7.0	TOTAL	ADULT CONTEMPORARY	ALBUM ORIENTED ROCK	BEAUTIFUL MUSIC	CONTEMPORARY HIT RADIO	COUNTRY
<u>How much do you agree or disagree with the following statements?</u>								
<u>SOCIAL GRATIFICATION</u>								
You think listening to radio really adds to the fun when you're with other people			4.9	4.8	6.2	4.1	5.5	4.8
You feel that what you learn from radio makes you more interesting to other people			4.3	3.8	4.1	4.1	4.0	4.4
You like to listen to the same radio stations as your friends do			3.8	3.0	4.4	3.3	4.2	3.7
The main reason you listen to radio is to get music to dance to			3.3	3.0	3.9	2.7	4.3	2.7
<u>INTELLECTUAL GRATIFICATION</u>								
The things you hear on radio really give you a lot to think about			4.9	4.5	4.7	4.6	4.8	4.9
The main reason you listen to radio is to feel more like a part of your community			3.5	3.0	3.0	3.0	3.2	3.5
The main reason you listen to radio is to get practical information about things like health, money and the law			3.4	3.1	2.7	2.9	2.8	3.1

Average ratings calculated only among those who had an opinion.

NEEDS AND BELIEFS: AVERAGE RATING SUMMARY (cont'd)

Disagree Strongly	Agree Strongly		TOTAL	ADULT CONTEMPORARY	ALBUM ORIENTED ROCK	BEAUTIFUL MUSIC	CONTEMPORARY HIT RADIO	COUNTRY
1.0	4.0	7.0						
<u>How much do you agree or disagree with the following statements?</u>								
<u>NEWS ORIENTATION</u>								
You listen to radio mainly for news			3.5	3.2	2.5	3.5	2.7	3.5
You know more about what's going on in the news than most other people			4.5	4.4	4.3	4.4	4.3	4.3
As far as you're concerned, news is too depressing and you'd rather not hear it			3.0	2.9	3.8	2.7	3.1	3.0
You think radio stations should stick to either news or music, but not both			2.7	2.3	3.4	2.4	3.0	2.5
<u>MUSIC EXPERTISE</u>								
You listen to radio mainly to "keep up" with the latest music			4.2	3.8	5.1	2.7	5.2	4.3
You listen to radio mainly to learn about music			3.9	3.6	4.6	3.1	4.6	3.7
You know more about music than most other people			3.6	3.5	4.3	3.2	3.9	3.2

Average ratings calculated only among those who had an opinion.

NEEDS AND BELIEFS: AVERAGE RATING SUMMARY (cont'd)

Disagree Strongly 1.0	Agree Strongly 7.0	TOTAL	FULL SERVICE	NEWS/TALK	NOSTALGIA	URBAN
<u>How much do you agree or disagree with the following statements?</u>						
<u>NEWS ORIENTATION</u>						
You listen to radio mainly for news		3.5	5.3	6.2	4.0	3.8
You know more about what's going on in the news than most other people		4.5	5.4	5.7	4.3	4.8
As far as you're concerned, news is too depressing and you'd rather not hear it		3.0	1.9	1.8	2.8	3.2
You think radio stations should stick to either news or music, but not both		2.7	2.0	2.5	2.4	2.7
<u>MUSIC EXPERTISE</u>						
You listen to radio mainly to "keep up" with the latest music		4.2	3.3	2.9	3.3	5.9
You listen to radio mainly to learn about music		3.9	3.1	2.8	3.4	5.1
You know more about music than most other people		3.6	2.9	3.1	4.1	4.2

Average ratings calculated only among those who had an opinion.

NEEDS AND BELIEFS: AVERAGE RATING SUMMARY (cont'd)

Disagree Strongly		Agree Strongly							
1.0		4.0	7.0	TOTAL	ADULT CONTEMPORARY	ALBUM ORIENTED ROCK	BEAUTIFUL MUSIC	CONTEMPORARY HIT RADIO	COUNTRY
<u>How much do you agree or disagree with the following statements?</u>									
<u>MUSIC ORIENTATION</u>									
Hearing music is really the only reason you listen to radio				4.4	4.8	5.5	4.4	4.9	4.3
You listen to radio mainly to hear particular songs that you like best				5.3	5.5	5.5	5.3	5.6	5.4
You listen to radio mainly to hear particular music groups or performers that you like best				4.8	4.6	5.3	4.6	5.1	5.0
When you listen to songs on the radio, you pay more attention to the words rather than to the sounds of the music				4.1	4.0	4.3	3.3	4.5	4.4
You think the music these days is not as good as it used to be				4.3	4.2	3.6	5.3	3.6	4.1
<u>PERSONALITY ORIENTATION</u>									
You listen to radio mainly to hear disc jockeys or radio personalities				3.3	2.7	3.1	3.0	3.5	3.5
You like the kind of disc jockeys or radio personalities who say funny things that make you laugh				5.3	5.5	5.6	4.0	6.0	5.6
You like the kind of disc jockeys or radio personalities that seem like personal friends of yours				4.6	4.6	4.6	3.9	5.1	4.8

Average ratings calculated only among those who had an opinion.

NEEDS AND BELIEFS: AVERAGE RATING SUMMARY (cont'd)

Disagree Strongly	Agree Strongly		TOTAL	FULL SERVICE	NEWS/TALK	NOSTALGIA	URBAN
1.0	4.0	7.0					
<u>How much do you agree or disagree with the following statements?</u>							
<u>MUSIC ORIENTATION</u>							
Hearing music is really the only reason you listen to radio			4.4	2.6	1.9	4.5	4.2
You listen to radio mainly to hear particular songs that you like best			5.3	4.4	3.6	5.0	6.0
You listen to radio mainly to hear particular music groups or performers that you like best			4.8	3.8	3.6	4.9	5.7
When you listen to songs on the radio, you pay more attention to the words rather than to the sounds of the music			4.1	3.3	3.5	3.9	5.1
You think the music these days is not as good as it used to be			4.3	5.2	4.8	5.6	4.0
<u>PERSONALITY ORIENTATION</u>							
You listen to radio mainly to hear disc jockeys or radio personalities			3.3	4.4	3.4	2.9	4.0
You like the kind of disc jockeys or radio personalities who say funny things that make you laugh			5.3	5.1	4.6	4.9	5.9
You like the kind of disc jockeys or radio personalities that seem like personal friends of yours			4.6	5.0	4.1	4.6	4.9

Average ratings calculated only among those who had an opinion.

NEEDS AND BELIEFS: AVERAGE RATING SUMMARY (cont'd)

Disagree Strongly 1.0	Agree Strongly 7.0	TOTAL	ADULT CONTEMPORARY	ALBUM ORIENTED ROCK	BEAUTIFUL MUSIC	CONTEMPORARY HIT RADIO	COUNTRY
<u>How much do you agree or disagree with the following statements?</u>							
<u>PERSONALITY ORIENTATION</u> (cont'd)							
It bothers you when disc jockeys or radio personalities talk over the beginnings of records	5.0	5.5	5.8	4.9	5.3	4.5	
<u>INVOLVEMENT WITH RADIO</u>							
When you listen to radio, you pay a lot of attention to it	5.4	5.0	5.6	4.8	5.4	5.4	
If you couldn't listen to radio, you'd feel something important was missing from your life	5.2	4.8	5.3	5.2	5.2	5.3	
<u>LOYALTY</u>							
When you first turn the radio on, you usually go straight to one of your favorite stations, without trying anything else	6.2	6.0	6.3	6.4	6.1	6.3	
It would really take a lot to get you to switch away from your favorite radio station	5.2	4.8	4.8	5.6	4.6	5.7	
You listen to the stations you do mainly out of habit	4.7	4.4	4.8	4.6	4.9	4.4	

Average ratings calculated only among those who had an opinion.

NEEDS AND BELIEFS: AVERAGE RATING SUMMARY (cont'd)

Disagree Strongly 1.0	Agree Strongly, 7.0		TOTAL	FULL SERVICE	NEWS/TALK	NOSTALGIA	URBAN
<u>How much do you agree or disagree with the following statements?</u>							
<u>PERSONALITY ORIENTATION</u> (cont'd)							
It bothers you when disc jockeys or radio personalities talk over the beginnings of records			5.0	4.2	4.0	5.0	5.3
<u>INVOLVEMENT WITH RADIO</u>							
When you listen to radio, you pay a lot of attention to it			5.4	5.2	6.1	5.3	6.1
If you couldn't listen to radio, you'd feel something important was missing from your life			5.2	5.2	5.2	5.3	5.3
<u>LOYALTY</u>							
When you first turn the radio on, you usually go straight to one of your favorite stations, without trying anything else			6.2	6.2	6.4	6.0	6.3
It would really take a lot to get you to switch away from your favorite radio station			5.2	5.2	5.6	5.8	4.8
You listen to the stations you do mainly out of habit			4.7	4.8	4.8	4.2	5.1

Average ratings calculated only among those who had an opinion.

NEEDS AND BELIEFS: AVERAGE RATING SUMMARY (cont'd)

Disagree Strongly		Agree Strongly							
1.0		4.0	7.0	TOTAL	ADULT CONTEMPORARY	ALBUM ORIENTED ROCK	BEAUTIFUL MUSIC	CONTEMPORARY HIT RADIO	COUNTRY
<u>How much do you agree or disagree with the following statements?</u>									
<u>LOYALTY</u> (cont'd)									
When you listen to radio, you generally switch around the dial until you find a sound you like, no matter which station it is				4.1	4.1	4.8	3.6	4.7	3.6
You're usually among the first to listen to a new radio station or format when it comes on the air				3.0	2.9	3.9	2.0	3.5	2.7
The stations you listen to sound so much alike its hard to tell one from another				2.7	2.7	3.0	2.4	2.9	2.7

Average ratings calculated only among those who had an opinion.

NEEDS AND BELIEFS: AVERAGE RATING SUMMARY (cont'd)

Disagree Strongly	Agree Strongly						
1.0	4.0	7.0	TOTAL	FULL SERVICE	NEWS/TALK	NOSTALGIA	URBAN
<u>How much do you agree or disagree with the following statements?</u>							
<u>LOYALTY</u> (cont'd)							
When you listen to radio, you generally switch around the dial until you find a sound you like, no matter which station it is			4.1	3.1	3.0	4.0	5.2
You're usually among the first to listen to a new radio station or format when it comes on the air			3.0	2.3	2.6	2.6	3.8
The stations you listen to sound so much alike its hard to tell one from another			2.7	2.5	2.4	2.3	3.1

Average ratings calculated only among those who had an opinion.

ADDITIONAL NEEDS AND BELIEFS AMONG NEWS/TALK AND FULL-SERVICE FANS:
AVERAGE RATING SUMMARY

Disagree Strongly	Agree Strongly		NEWS/TALK	FULL SERVICE
1.0	4.0	7.0		
<u>How much do you agree or disagree with the following statements?</u>				
You like it when radio news investigates government and business, even if it stirs up trouble			6.2	5.4
When you listen to radio news, you're mainly looking for a quick wrap-up of what's going on in the world, even if you don't get much in-depth coverage			5.5	5.6
You listen to radio mainly to find out what other people feel and think			5.1	4.7
You listen to radio news mainly to be re-assured that nothing is happening that will hurt you or the people you care about			4.5	3.9
You think radio news should go out of its way to cover the pleasant things in life rather than a lot of crime, corruption and violence			3.9	3.9
The main reason you like call-in talk shows is that you are interested in listening to other peoples' problems and personal lives			3.5	3.7

Average ratings calculated only among those who had an opinion.

IDEAL STATION "PERSONALITY": AVERAGE RATING SUMMARY

Left Side	vs	Right Side	TOTAL	ADULT CONTEMPORARY	ALBUM ORIENTED ROCK	BEAUTIFUL MUSIC	CONTEMPORARY HIT RADIO	COUNTRY
1.0	4.0	7.0						
<u>My "ideal" radio station is ...</u>								
Like A Person Who Plays It Safe	vs	Like A Person Who Rocks The Boat	4.0	3.8	4.7	3.1	4.2	3.7
Like A Person On My Level	vs	Like A Person I Can Look Up To	3.5	3.2	3.0	3.5	3.5	3.5
Traditional	vs	Trend- setting	3.5	3.2	4.7	2.4	4.1	2.7
Down-To- Earth And Folksy	vs	Polished And Sophisti- cated	3.4	3.8	3.7	3.4	4.0	2.2
Cheerful	vs	Serious	2.5	2.4	2.2	2.4	2.1	2.2

Average ratings calculated only among those who had an opinion.

IDEAL STATION "PERSONALITY": AVERAGE RATING SUMMARY (cont'd)

Left Side 1.0		Right Side 7.0		TOTAL	FULL SERVICE	NEWS/TALK	NOSTALGIA	URBAN
My "ideal" radio station is ...								
Like A Person Who Plays It Safe	vs	Like A Person Who Rocks The Boat		4.0	4.0	4.8	3.0	3.7
Like A Person On My Level	vs	Like A Person I Can Look Up To		3.5	4.1	4.6	2.8	4.5
Traditional	vs	Trendsetting		3.5	2.7	3.6	2.3	4.2
Down-To- Earth And Folksy	vs	Polished And Sophisticated		3.4	3.0	3.8	3.2	3.6
Cheerful	vs	Serious		2.5	2.9	4.1	2.5	2.6

Average ratings calculated only among those who had an opinion.

IDEAL STATION PROGRAMMING: AVERAGE RATING SUMMARY

Left Side 1.0	vs	Right Side 7.0		TOTAL	ADULT CONTEMPORARY	ALBUM ORIENTED ROCK	BEAUTIFUL MUSIC	CONTEMPORARY HIT RADIO	COUNTRY
My "ideal" radio station ... (is/has) ...									
Makes Me Feel Lively And Energetic	vs	Makes Me Feel Calm And Relaxed		4.0	4.2	2.7	5.4	2.9	4.4
Predictable	vs	Unpredictable		3.5	3.4	4.1	2.5	4.3	3.2
More Music That Matches The Mood I'm In	vs	More Music That Gets Me In A Differ- ent Mood		4.1	4.1	4.2	4.0	4.3	4.0
More Current Songs	vs	More Older Songs		4.0	4.3	3.0	5.5	2.9	4.1
More Familiar Songs	vs	More Unfamiliar Songs		2.8	3.0	3.2	2.2	2.9	2.8
Music Without Much News And Info	vs	News And Info Without Much Music		2.5	2.1	1.7	2.2	2.0	2.4
Personalities Who Play More Music Without Much Talk	vs	Personalities Who Talk More Without Much Music		2.0	1.7	1.6	1.6	1.9	2.1
Entertaining Talk	vs	Informative Talk		3.9	3.8	3.1	4.8	3.1	3.9

Average ratings calculated only among those who had an opinion.

IDEAL STATION PROGRAMMING: AVERAGE RATING SUMMARY (cont'd)

Left Side	vs	Right Side					
1.0	4.0	7.0	TOTAL	FULL SERVICE	NEWS/TALK	NOSTALGIA	URBAN
My "ideal" radio station ... (is/has)...							
Makes Me Feel Lively And Energetic	vs	Makes Me Feel Calm And Relaxed	4.0	4.8	4.6	4.7	4.0
Predictable	vs	Unpredictable	3.5	3.3	3.6	2.8	3.2
More Music That Matches The Mood I'm In	vs	More Music That Gets Me In A Different Mood	4.1	4.0	+	4.1	4.6
More Current Songs	vs	More Older Songs	4.0	5.5	+	5.9	3.4
More Familiar Songs	vs	More Unfamiliar Songs	2.8	2.2	+	2.1	3.1
Music Without Much News And Info	vs	News And Info Without Much Music	2.5	3.9	5.3	2.4	2.3
Personalities Who Play More Music Without Much Talk	vs	Personalities Who Talk More Without Much Music	2.0	3.3	3.4	1.7	1.7
Entertaining Talk	vs	Informative Talk	3.9	4.6	6.0	4.2	3.7

Average ratings calculated only among those who had an opinion.

+Not asked.

MUSIC PREFERENCES: AVERAGE RATING SUMMARY

Compared to other kinds of music on radio, I like this kind of music ...	ADULT CONTEMPO- RARY	ALBUM ORIENTED ROCK	BEAUTI- FUL MUSIC	CONTEMPO- RARY HIT RADIO	COUNTRY	FULL SERVICE	NEWS/ TALK	NOSTALGIA	URBAN
A Lot Less									
1.0									
4.0									
7.0									
Big Band	+	+	5.8	+	+	+	+	6.4	+
Beautiful Music	+	+	5.9	+	+	+	+	5.1	+
Modern Country	4.1	+	+	+	6.4	+	+	+	+
Traditional Country	+	+	+	+	6.0	+	+	+	+
Middle-of-the-Road	+	+	5.3	+	3.1	4.8	+	5.7	+
Soft Rock	5.5	3.0	4.4	4.4	3.6	4.7	+	3.8	3.5
Hard Rock	2.3	5.8	+	4.4	+	+	+	+	2.7
New Wave	+	4.1	+	3.0	+	+	+	+	2.6
Urban	2.6	2.5	+	3.6	+	+	+	+	6.0

Average ratings calculated only among those who had an opinion.

+Not asked.

ATTITUDE TOWARD PROGRAMMING ELEMENTS: AVERAGE RATING SUMMARY

<u>Do you like or dislike hearing this on radio?</u>	TOTAL	ADULT CONTEMPORARY	ALBUM ORIENTED ROCK	BEAUTIFUL MUSIC	CONTEMPORARY HIT RADIO	COUNTRY
Dislike Strongly Like Strongly 1.0 4.0 7.0						
Call-in talk shows	4.5	4.0	4.1	4.3	4.6	4.5
Contests	4.3	4.0	4.7	3.1	5.0	4.5
Play-by-play sports coverage	3.4	3.0	3.2	3.4	3.1	3.4
Jingles	3.3	3.1	3.1	3.1	3.6	3.7

Average ratings calculated only among those who had an opinion.

ATTITUDE TOWARD PROGRAMMING ELEMENTS: AVERAGE RATING SUMMARY (cont'd)

<u>Do you like or dislike hearing this on radio?</u>	TOTAL	FULL SERVICE	NEWS/TALK	NOSTALGIA	URBAN
Dislike Strongly Like Strongly 1.0 4.0 7.0					
Call-in talk shows	4.5	5.3	5.7	3.8	5.2
Contests	4.3	3.9	3.6	3.6	5.4
Play-by-play sports coverage	3.4	4.1	4.2	3.7	3.5
Jingles	3.3	3.8	3.6	2.8	3.4

Average ratings calculated only among those who had an opinion.

HOW OFTEN LISTENERS LISTEN TO VARIOUS FORMATS

<u>I listen to this kind of station ...</u>	TOTAL	ADULT CONTEMPORARY	ALBUM ORIENTED ROCK	BEAUTIFUL MUSIC	CONTEMPORARY HIT RADIO	COUNTRY
<u>Never</u> <u>Always</u>						
1.0 7.0						
Adult Contemporary	3.1	5.8	2.6	2.9	3.6	2.4
Album Oriented Rock	2.9	2.2	6.1	1.6	3.4	2.1
Beautiful Music	2.6	2.4	1.5	5.9	1.8	2.1
Contemporary Hit Radio	3.0	2.7	3.1	1.9	5.9	2.1
Country	3.0	2.5	1.9	2.5	2.2	6.1
Full Service	2.6	2.1	1.9	2.9	2.2	2.4
News/Talk	2.5	2.2	1.6	2.7	1.8	2.0
Nostalgia	2.1	1.6	1.2	3.3	1.3	1.9
Urban	2.2	1.8	1.8	1.6	2.4	1.5

Average ratings calculated only among those who had an opinion.

HOW OFTEN LISTENERS LISTEN TO VARIOUS FORMATS (cont'd)

<u>I listen to this kind of station ...</u>	TOTAL	FULL SERVICE	NEWS/TALK	NOSTALGIA	URBAN
<u>Never</u> <u>Always</u>					
1.0 7.0					
Adult Contemporary	3.1	2.5	2.2	2.3	3.4
Album Oriented Rock	2.9	1.5	1.7	1.6	2.6
Beautiful Music	2.6	2.9	2.6	3.3	1.9
Contemporary Hit Radio	3.0	1.9	1.7	1.8	4.3
Country	3.0	2.7	2.4	2.7	2.0
Full Service	2.6	5.8	2.5	2.9	2.6
News/Talk	2.5	2.9	5.6	2.8	2.2
Nostalgia	2.1	2.4	2.4	5.9	1.6
Urban	2.2	1.4	1.4	1.7	6.2

Average ratings calculated only among those who had an opinion.

TIME SPENT LISTENING TO RADIO

	TOTAL	ADULT CONTEMPORARY	ALBUM ORIENTED ROCK	BEAUTIFUL MUSIC	CONTEMPORARY HIT RADIO	COUNTRY
(Number of Respondents)	(1300)	(150)	(253)	(148)	(168)	(246)
<u>On an average weekday, I usually listen to the radio ...</u>						
<u>LIGHTEST QUARTER</u>	22%	23%	16%	27%	24%	23%
Less than 30 minutes	3%	3%	1%	7%	1%	4%
30 to less than 60 minutes	10	14	7	10	11	8
60 to less than 90 minutes	9	6	8	10	12	11
<u>LIGHT QUARTER</u>	28	36	26	28	28	25
90 to less than 120 minutes	7	14	6	8	6	5
2 hours to less than 3 hours	21	22	20	20	22	20
<u>HEAVY QUARTER</u>	28	27	31	30	28	28
3 hours to less than 4 hours	12	10	13	13	14	11
4 hours to less than 5 hours	9	11	12	9	6	8
5 hours to less than 6 hours	7	6	6	8	8	9
<u>HEAVIEST QUARTER</u>	22	14	27	14	20	24
6 hours to less than 7 hours	4	5	5	1	4	4
7 hours to less than 8 hours	3	-	3	3	4	3
8 hours to less than 9 hours	4	-	4	4	1	5
9 hours to less than 10 hours	2	2	3	1	2	3
10 hours or more	9	7	12	5	9	9
Don't know	*	-	-	1	-	-

*Less than ½%.

TIME SPENT LISTENING TO RADIO (cont'd)

	TOTAL	FULL SERVICE	NEWS/TALK	NOSTALGIA	URBAN
(Number of Respondents)	(1300)	(78)	(98)	(66)	(93)
<u>On an average weekday, I usually listen to the radio ...</u>					
<u>LIGHTEST QUARTER</u>	22%	27%	25%	32%	11%
Less than 30 minutes	3%	5%	4%	8%	-%
30 to less than 60 minutes	10	12	11	15	2
60 to less than 90 minutes	9	10	10	9	9
<u>LIGHT QUARTER</u>	28	25	34	37	17
90 to less than 120 minutes	7	3	10	8	5
2 hours to less than 3 hours	21	22	24	29	12
<u>HEAVY QUARTER</u>	28	30	28	12	39
3 hours to less than 4 hours	12	10	13	8	16
4 hours to less than 5 hours	9	10	8	3	13
5 hours to less than 6 hours	7	10	7	1	10
<u>HEAVIEST QUARTER</u>	22	18	13	19	33
6 hours to less than 7 hours	4	1	3	5	4
7 hours to less than 8 hours	3	4	1	3	5
8 hours to less than 9 hours	4	5	3	4	8
9 hours to less than 10 hours	2	-	2	1	-
10 hours or more	9	8	4	6	16
Don't know	*	-	-	-	-

*Less than ½%.

PROFILE OF FORMATS

	TOTAL	ADULT CONTEMPORARY	ALBUM ORIENTED ROCK	BEAUTIFUL MUSIC	CONTEMPORARY HIT RADIO	COUNTRY
(Number of Respondents)	(1300)	(150)	(253)	(148)	(168)	(246)
<u>SEX AND AGE</u>						
12-17 Teens	12%	7%	29%	-%	26%	3%
18-24 Men	8	6	21	-	11	4
25-34 Men	11	15	15	3	17	11
35-44 Men	8	11	5	6	4	12
45-54 Men	6	5	-	11	1	8
55-64 Men	5	5	1	12	1	3
65 and over Men	5	*	1	12	*	5
18-24 Women	8	8	15	1	15	4
25-34 Women	11	23	9	3	20	14
35-44 Women	8	12	3	11	4	14
45-54 Women	6	4	*	9	1	11
55-64 Women	6	1	1	14	-	8
65 and over Women	6	3	*	18	*	3
<u>RACE</u>						
White	85%	86%	93%	92%	80%	95%
Black	10	8	2	7	12	1
Hispanic	4	5	4	1	6	2
Other	1	1	1	-	2	2
Refused	*	-	-	*	-	*
<u>OCCUPATION OF HEAD OF HOUSEHOLD</u>						
White collar	52%	69%	50%	62%	50%	40%
Blue collar	45	29	47	36	45	58
Refused	3	2	3	2	5	2
<u>TIME SPENT LISTENING</u>						
Lightest quarter	22%	23%	16%	26%	24%	22%
Light quarter	28	35	26	28	29	25
Heavy quarter	29	27	31	30	27	29
Heaviest quarter	21	15	27	15	20	24
Don't know	*	-	-	1	-	-

* Less than ½%.

PROFILE OF FORMATS (cont'd)

	TOTAL	FULL SERVICE	NEWS/TALK	NOSTALGIA	URBAN
(Number of Respondents)	(1300)	(78)	(98)	(66)	(93)
<u>SEX AND AGE</u>					
12-17 Teens	12%	1%	-%	-%	18%
18-24 Men	8	1	3	1	13
25-34 Men	11	5	5	5	9
35-44 Men	8	12	9	1	9
45-54 Men	6	9	11	14	1
55-64 Men	5	9	11	14	1
65 and over Men	5	12	14	14	1
18-24 Women	8	3	1	-	18
25-34 Women	11	6	2	5	11
35-44 Women	8	10	8	4	7
45-54 Women	6	3	11	12	9
55-64 Women	6	10	8	18	3
65 and over Women	6	19	17	12	-
<u>RACE</u>					
White	85%	94%	92%	91%	11%
Black	10	4	7	6	77
Hispanic	4	1	-	3	11
Other	1	1	1	-	1
Refused	*	-	-	-	-
<u>OCCUPATION OF HEAD OF HOUSEHOLD</u>					
White collar	52%	51%	68%	59%	31%
Blue collar	45	46	32	36	64
Refused	3	3	-	5	5
<u>TIME SPENT LISTENING</u>					
Lightest quarter	22%	27%	25%	32%	11%
Light quarter	28	24	34	36	17
Heavy quarter	29	31	28	12	39
Heaviest quarter	21	18	13	20	33
Don't know	*	-	-	-	-

* Less than ½%.

SAMPLE CLASSIFICATION

(Number of Respondents = 1300)	PERCENT
<u>SEX</u>	
Male	48%
Female	52
<u>AGE</u>	
12-17	12%
18-24	16
25-34	22
35-44	16
45-54	12
55-64	11
65 and over	11
<u>RACE</u>	
White	85%
Black	10
Hispanic	4
Other	1
Refused	*
<u>OCCUPATION OF HEAD OF HOUSEHOLD</u>	
White collar	52%
Blue collar	45
Refused	3

*Less than $\frac{1}{2}\%$.

APPENDIX

— METHODOLOGY —

RADIO WARS is the result of telephone interviews with 1300 radio listeners. The interviewing was conducted from May 27 through June 22, 1983, from Reymer & Gersin's central WATS facility in Southfield, Michigan.

One hundred listeners were surveyed in each of the following 13 Metro Survey Areas:

ALBANY-SCHENECTADY-TROY, ATLANTA,
CHICAGO, DENVER, GREENSBORO-
WINSTON-SALEM-HIGH POINT, HOUSTON,
MEMPHIS, NEW YORK, OMAHA, ORLANDO,
PORTLAND, SACRAMENTO AND SAN DIEGO

These markets were selected to provide a representation of U.S. geographic regions. They were chosen from the top 75 markets because those markets provided a more complete representation of the formats under study.

To qualify for the sample, a respondent had to be 12 or older and had to have listened to radio for at least 15 minutes on an average weekday. Age and sex quotas for each market were set, based on total radio listening in those markets. County quotas were based on geographic distribution within each Metro Survey Area.

Respondents for the RADIO WARS study were selected by a modified random digit dialing procedure. "Seed" numbers were selected from local telephone directories using a systematic technique. Then a "1" was added to the final digit of all those numbers except the ones ending with "9" . . . in that case a "2" was added. This was done to avoid contacting businesses, since a higher-than-average percentage of them have numbers ending in zero.

If no contact was made using the original seed number, interviewers went down the column sequentially to find up to 9 new seed numbers, again adding 1 or 2 to each.

If that "block" of 10 numbers failed to yield a contact, call-backs were attempted at a later time, starting with the original seed number, and again down the list up to 9 numbers. If those call-backs failed to yield a contact, that block of numbers was then dropped.

Of 9,023 contacts made, 6,014 agreed to be interviewed, giving a cooperation rate of 65%. Of those, 4,714 did not meet quotas or screening criteria. One thousand three hundred interviews were completed.

Interviewing was monitored by Reymer & Gersin's supervisory personnel. Ten percent of respondents who completed interviews were recontacted for validation purposes.

Questionnaire Design

Favorite Format. RADIO WARS determined listening behavior and format preferences by describing the 9 formats and giving local stations as examples of each. The names of the formats—for example, "Adult Contemporary" or "Urban"—were never read to respondents.

A customized version of the basic questionnaire was used in every market. For example, describing Country radio in Chicago, we said:

"Think about the kind of radio stations like WMAQ AM 67, WUSN FM 99.5 or WJEZ FM 104 . . . stations that play music by performers like Willie Nelson, Loretta Lynn, Larry Gatlin and the Oak Ridge Boys . . ."

Describing News/Talk in Houston, we said:

"What about stations like KTRH AM 740 or KPRC AM 950 . . . stations with all-news, interviews or talk shows where listeners can call in . . ."

We then asked how often respondents listened to each format:

“Do you listen to that kind of station...always, usually, often, sometimes, rarely or never?”

These questions determined not only how much respondents listen to various formats, but, more important, it prepared them for the next question. After all the formats were described, we asked respondents to think about all 9 “kinds” of stations, reviewing the choices when necessary. We then asked:

“Which ONE kind of station is your *favorite*... the kind of radio station that you like best?”

The answer to this question provided the format “break” for this study.

The Fall, 1982 edition of James Duncan’s *American Radio* was the source for the local station examples used in this study. Note that like Duncan, we distinguish the “Full Service” format—what Duncan calls “MOR”—from Adult Contemporary format. In our previous survey research and focus groups, we have noted tremendous psychological differences between fans of this format and music-oriented A/C fans. RADIO WARS confirms this.

In addition to Duncan, other sources, like *Radio & Records*, were also used to clarify or update station formats. In other cases, current playlists were obtained from stations. Based on all this information, we made a final judgment on the format examples.

Every effort was made to keep abreast of recent format changes. In addition, every effort was made to identify stations as they identify themselves on the air, in addition to call letters. For example, in Atlanta, WKLS FM was also identified as “96 Rock.”

Keep in mind that RADIO WARS is a study of *formats*, not individual stations! Stations are only used as *examples* of formats, along with descriptions of programming. Once favorite format was determined, listeners were taken through a number of other series of questions:

Psychographics. Respondents were read statements to which they were asked to “agree” or “disagree.” These questions deal with key issues such as:

- Listeners’ emotional, social and intellectual motivations for listening.
- Listeners’ “self-image”...do they think of themselves as knowledgeable about music or news?... first to try new stations?...followers or individualists? etc.
- Listeners’ news, music and personality orientation.
- Listeners’ loyalty and involvement with radio.

Station Ideals. These questions probe listeners’ “ideal” radio station, reflecting their own desires. For example, would their ideal radio station...

- be more “traditional” or “trend-setting”?
- play more older songs or current songs?
- be more cheerful or serious?
- make them feel more energetic or relaxed?

Music and Programming Preferences. While listeners’ psychology is the thrust of RADIO WARS, their attitudes toward programming elements like contests and jingles often reflect that psychology, and were also tested. We also tested a limited number of music types for each format.

Focus groups were used to aid in the design of the RADIO WARS questionnaire. In addition, the questionnaire was pretested to insure that all questions would be thoroughly understood by respondents.

Analysis

This study uses two types of data analysis...cross-tabulation and Cluster Analysis.

Cross-Tabulations are used to compare each format’s fans against other listeners on all key issues.

Cluster Analysis is used to subdivide each format’s fans into a series of “segments”—each a group of listeners with unique attitudes, preferences and motivations for listening to radio.

