
RESEARCH REPORT

ISSUES FACING RADIO RESEARCHERS

IN THE '90s

Birch
Scarborough
Research



CLARITAS/Accountline

UNIVERSITY OPERATIONS CENTER
RESEARCH DEPARTMENT
CORAL SPRINGS, FL

ISSUES FACING RADIO RESEARCHERS
IN THE '90s

Issues Facing Radio Researchers

In The '90s

AGENDA

- What does Birch Scarborough "do" as a research company?
 - ▶ Collect data from respondents
 - ◆ Respondents
 - ◆ Telecommunication system to reach them
 - ▶ Know what we are reporting about
 - ◆ Radio industry today
 - ◆ Radio industry tomorrow
 - ▶ What do clients want?
 - ◆ Type of data
 - ◆ Flexibility of data
 - ◆ Speed of providing data

Issues Facing Radio Researchers

In The '90s

The Respondent

- Who is the respondent today?
 - ▶ The age and ethnic makeup of the population is changing

Issues Facing Radio Researchers

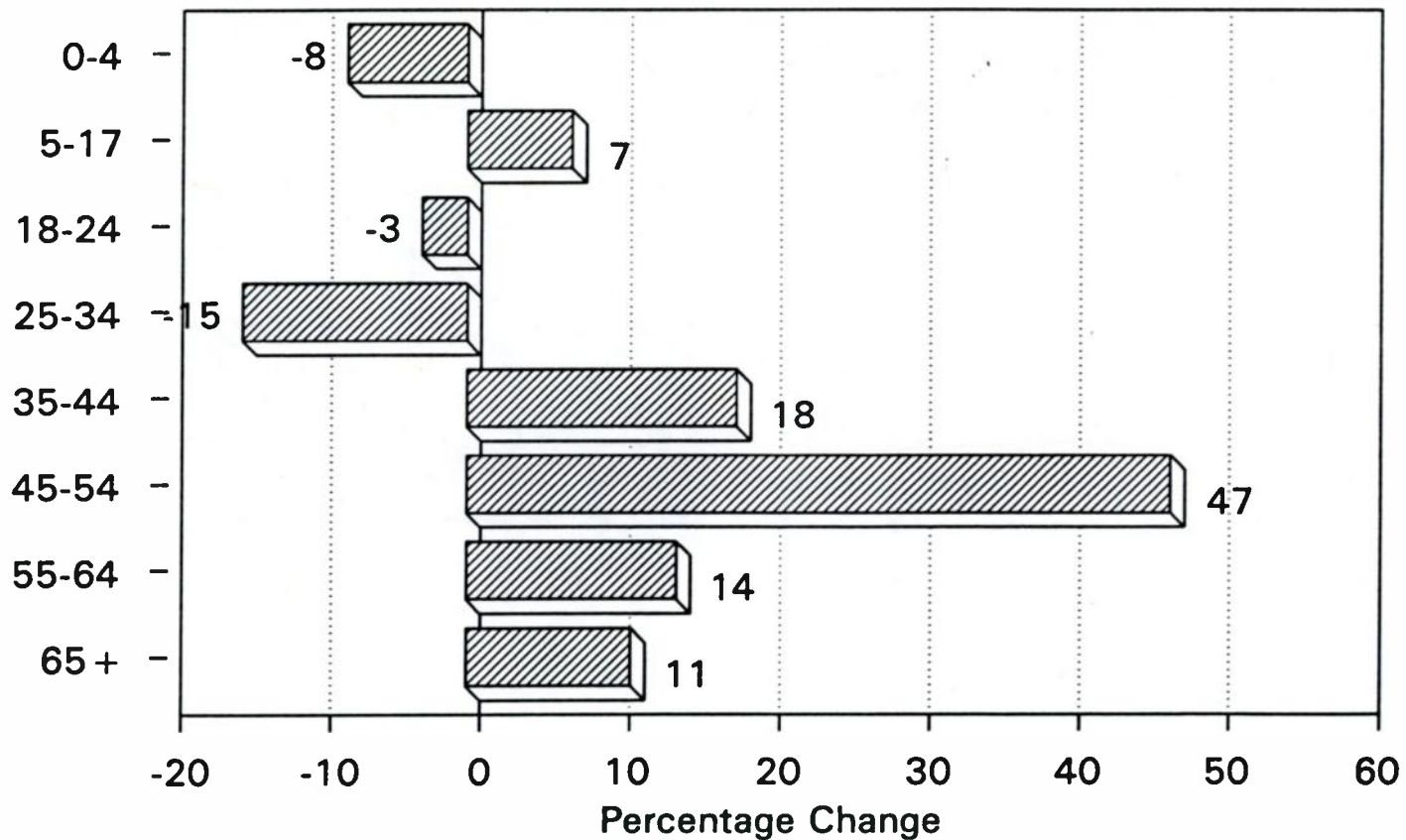
In The '90s

The Respondent

- Who will the respondent of tomorrow be?
 - ▶ Older
 - ▶ More likely to be non-white
 - ◆ Hispanics may be the largest minority group by the year 2000

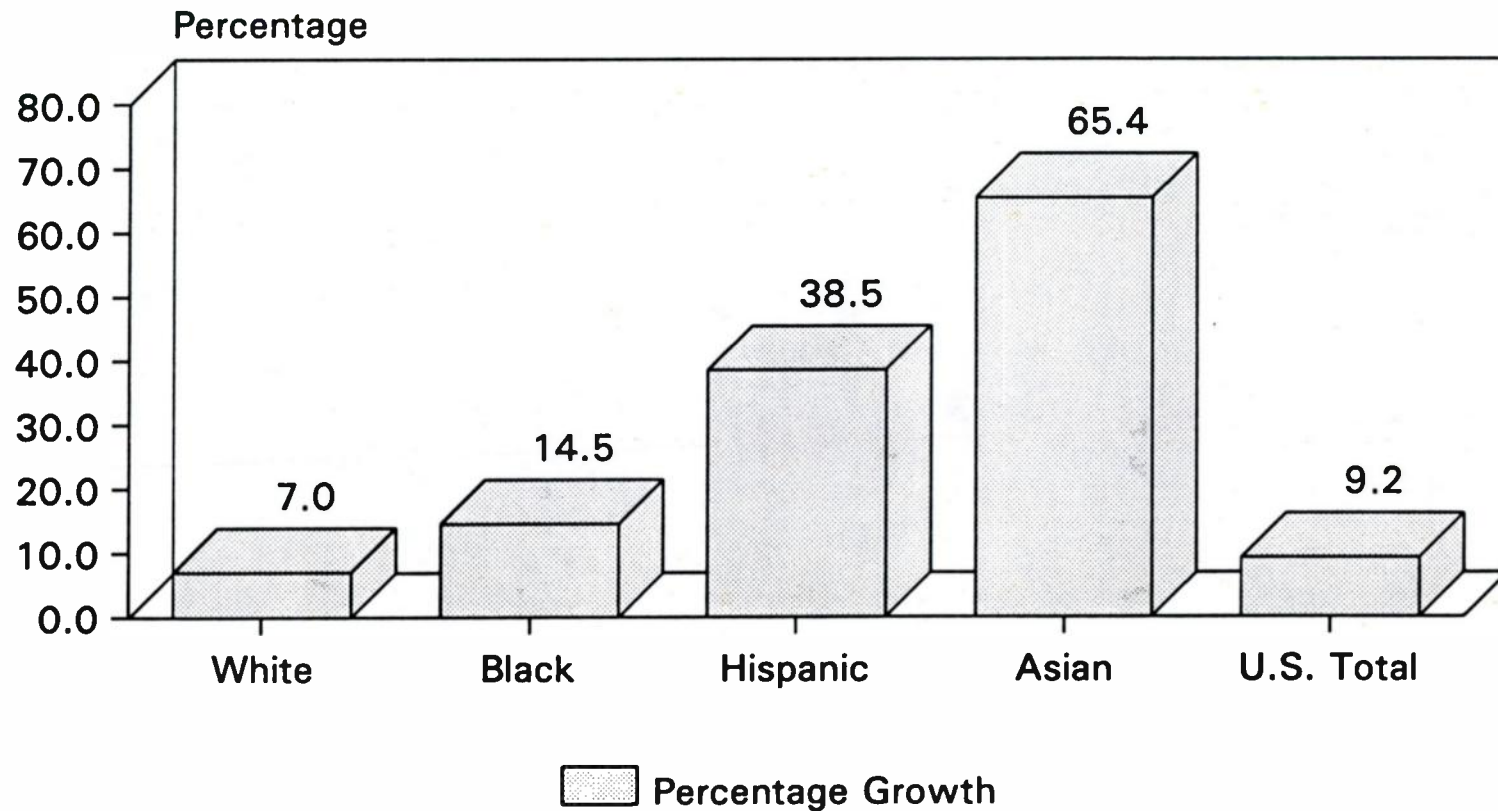
Estimated Changes in the U.S. Population By Age Group 1990-2000

Age Group



1990-1991 Almanac of Consumer Markets
American Demographic Press

Population Growth by Ethnic Groups 1980-1989



Source: Population Reference Bureau

Issues Facing Radio Researchers

In The '90s

The Respondent

- **When and How Can the Respondent Be Reached?**
 - ▶ **Telecommunication is part of the equation**
 - ▶ **Changes in time use by Americans**
 - ◆ **Although Americans have more free time than ever, more always feel rushed**
 - ◆ **Longer commutes/more waiting in line**
 - ◆ **More competition for time**

Issues Facing Radio Researchers

In The '90s

The Respondent

- **Will the Respondent Talk To Us When We Reach Him/Her?**
 - ▶ **More knowledge about the respondent**
 - ▶ **Refusals**
 - ▶ **Interview Wording**

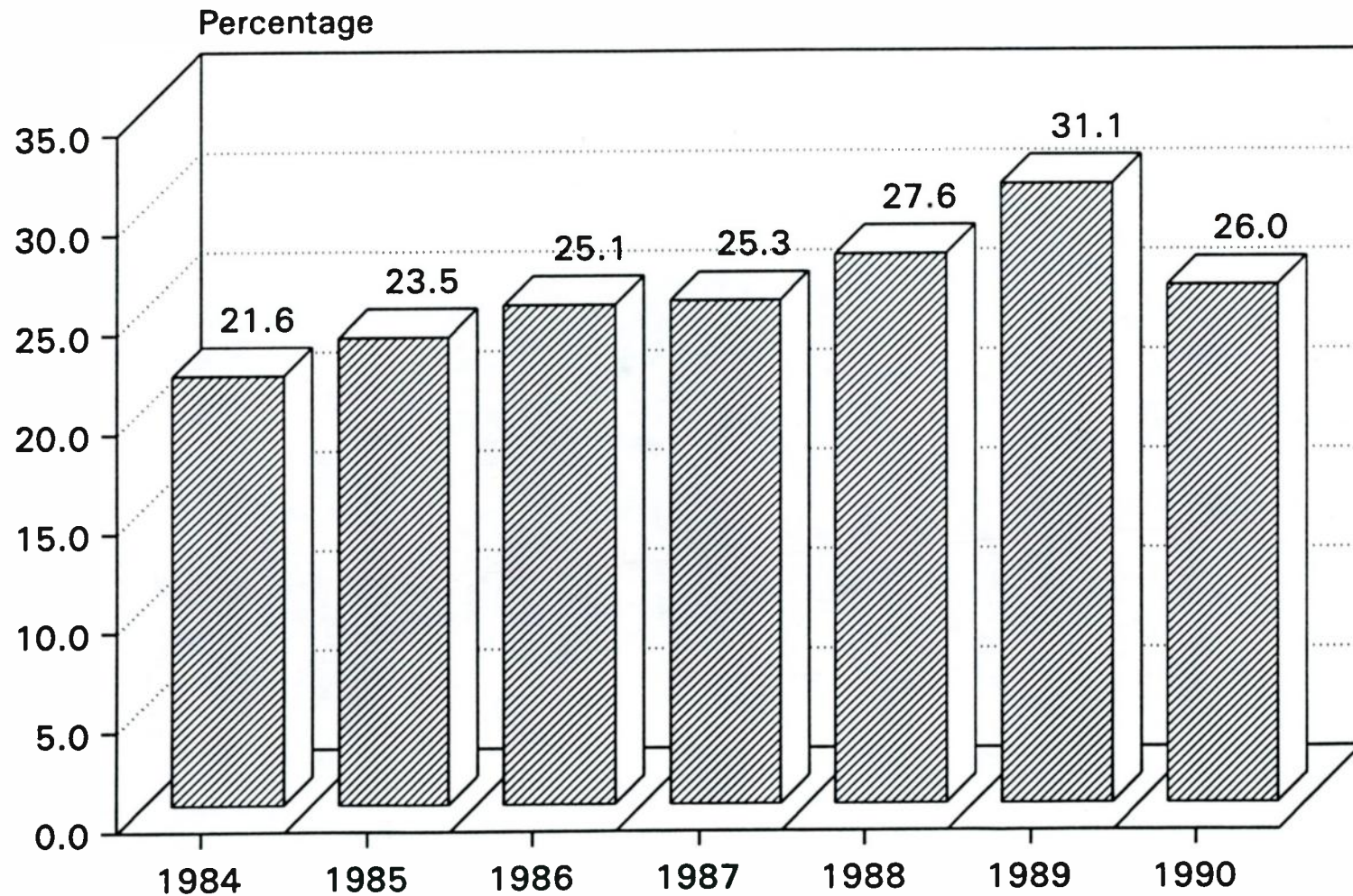
Issues Facing Radio Researchers

In The '90s

Telecommunication Systems

- Reaching respondents becomes a different challenge
 - ▶ The "cat and mouse" problem
- Better technology helps both sides
 - ▶ Respondents have:
 - ◆ Answering machines
 - ◆ Unlisted numbers
 - ◆ Confounding technology: Multiple lines, fax machines, etc.
 - ◆ Potential for Automatic Number Identification (ANI)
 - ▶ We have:
 - ◆ Computer Assisted Telephone Interviewing (CATI)
 - ◆ Better research and training
 - ◆ Surveying about a "product" nearly everyone uses

National Unlisted Rates



Survey Sampling Inc.

Issues Facing Radio Researchers

In The '90s

Top Five Metros: Unlisted Numbers

Metro	Percentage Unlisted
Los Angeles/Long Beach	59.9%
Las Vegas	58.3
Oakland	58.2
Fresno	58.0
San Jose	56.4

Source: Survey Sampling Inc.

Birch Scarborough Research

Issues Facing Radio Researchers

In The '90s

What Are We Reporting About?

- **The Radio Industry Today**
 - ▶ **Growth in Stations**
 - ◆ **Turnarounds**
 - ◆ **Docket 80-90**
 - ◆ **Expanded AM Band**
 - ▶ **The Problems with AM**
 - ▶ **Format Fragmentation**
 - ▶ **FCC Deregulation**
 - ◆ **News/Public Affairs**
 - ◆ **Commercial Limitations**
 - ◆ **Ownership Restrictions**
 - ▶ **FCC Re-regulation**
 - ◆ **Indecency**
 - ◆ **Translators**

Issues Facing Radio Researchers

In The '90s

What Are We Reporting About?

- **Radio Industry Tomorrow**
 - ▶ **Digital Audio Broadcasting**
 - ▶ **New Competition?**
 - ◆ **Telco/cable fallout**
 - ◆ **Other means of reaching consumers**

Issues Facing Radio Researchers

In The '90s

What Do Clients Want?

- **Types of data**
 - ▶ **Flexible data**
 - ◆ **Non-standard demos**
 - ◆ **Non-standard geographies**
 - ◆ **Qualitative**
 - ◆ **More information**
 - ▶ **Speed of providing data**
 - ◆ **ASAP**

Issues Facing Radio Researchers
In The '90s

Birch/Scarborough Is Ready For The '90s
...And Beyond

Birch Scarborough Research