

**edison media research**

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**Country P1s 2005**

**The CRS Research Study**

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# How the survey was conducted:

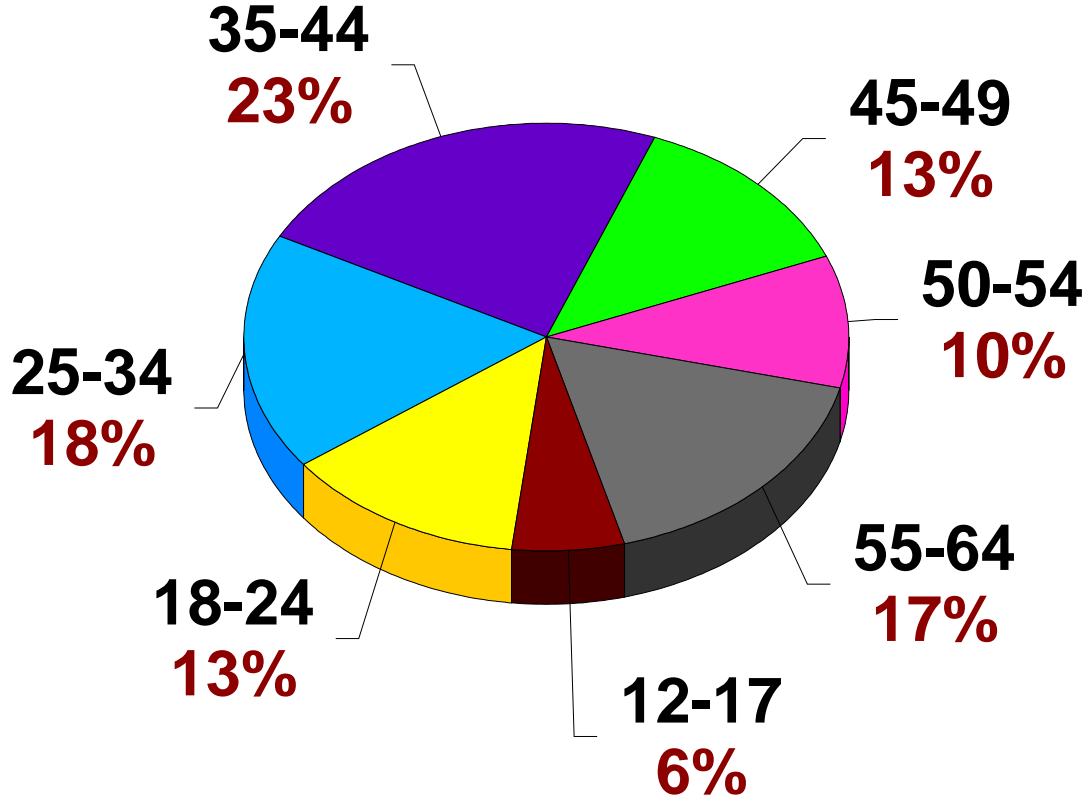
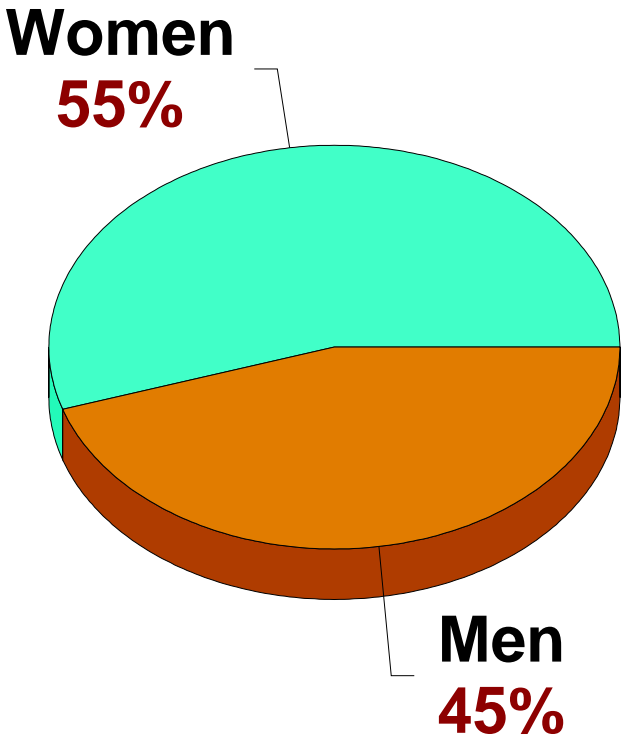
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- 11,209 total interviews
- Adults, Age 12 to 64
- All P1s to a Country Radio Station
- Sample recruited from databases for 13 stations across U.S.

# Participating stations: Thank you!



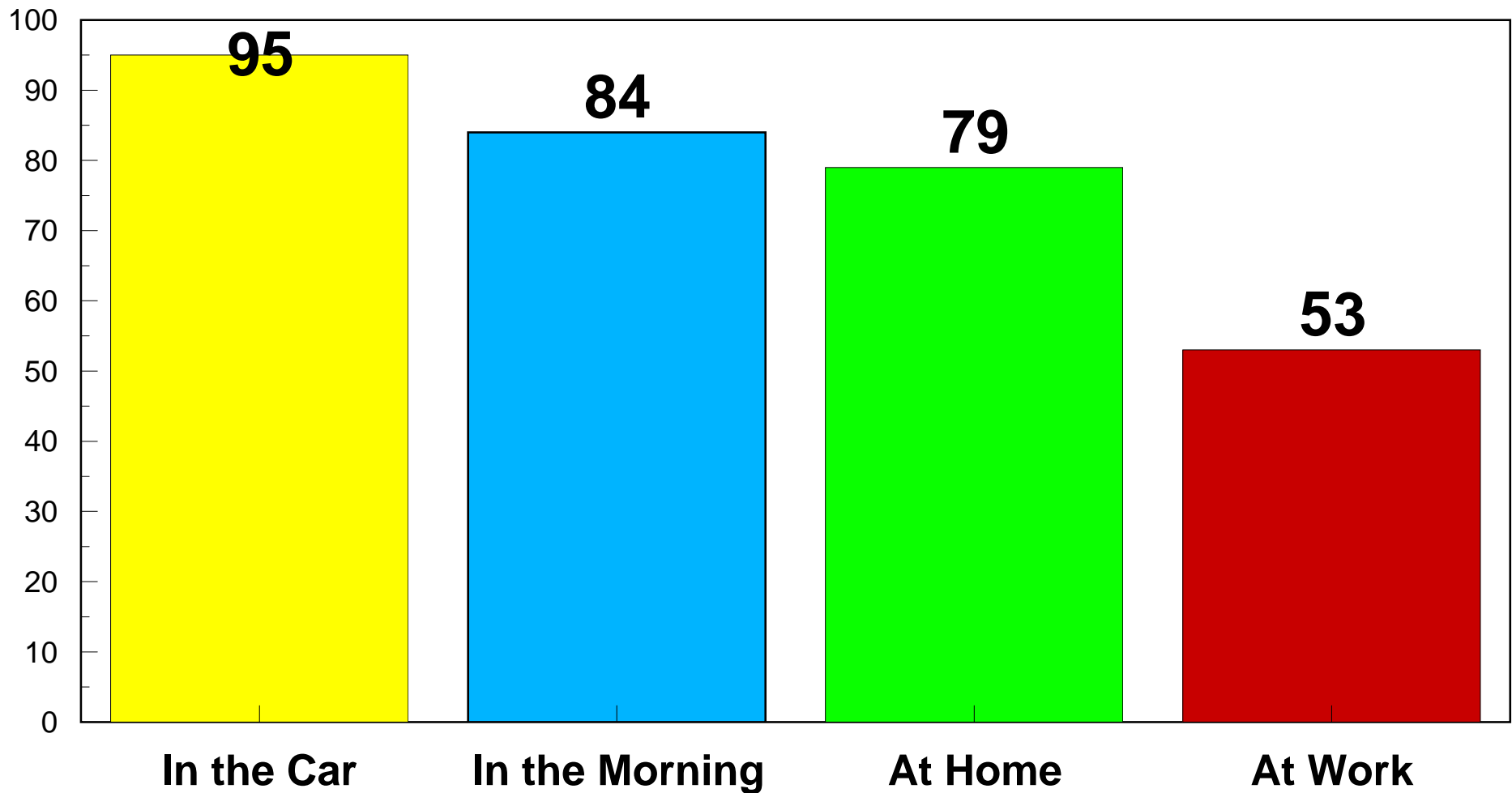
# Who was interviewed?



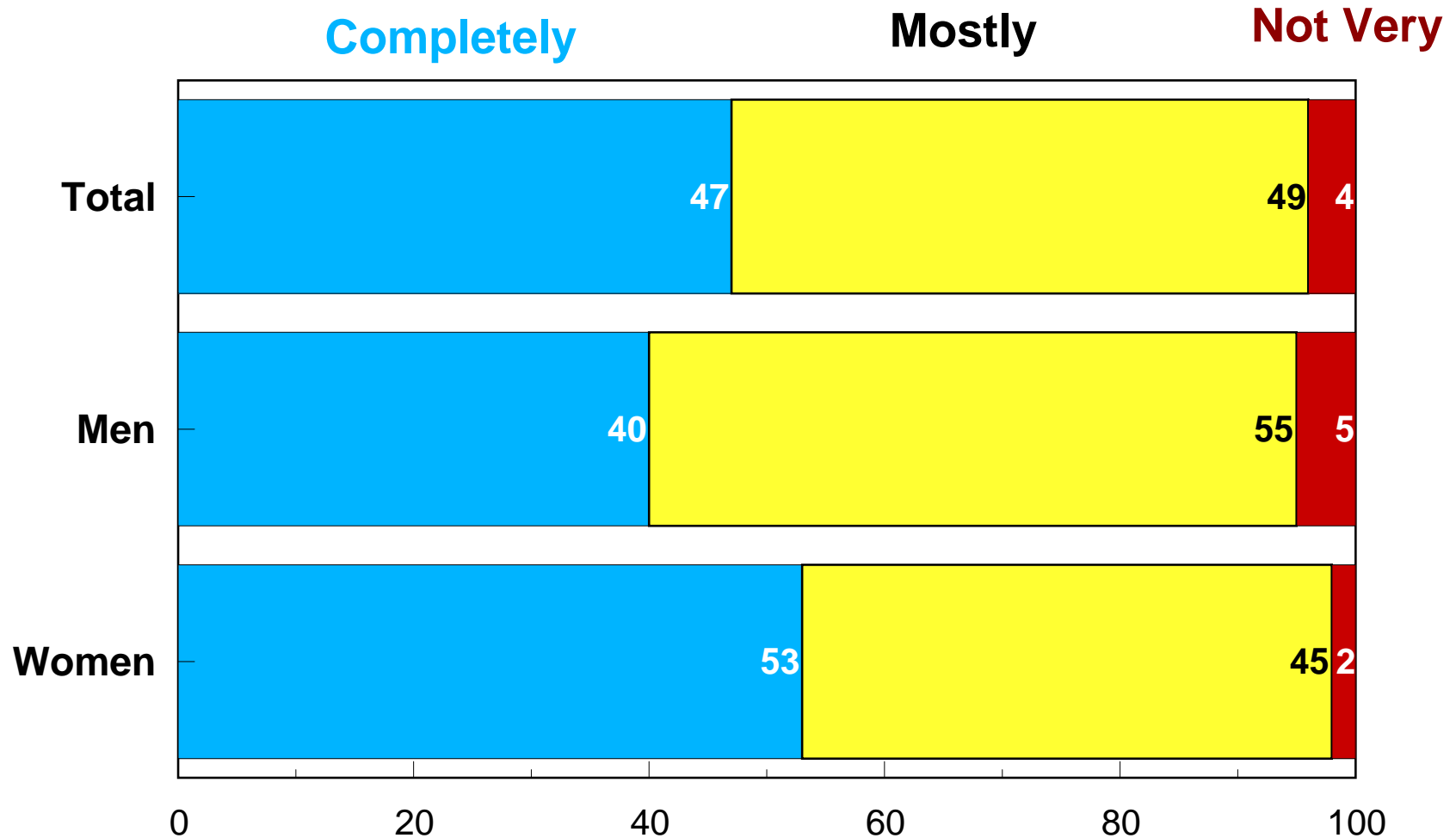
# Radio Listening

# Among overall Country P1s, what percentage listen to that Country station most in their car, in the morning, at home or at-work?

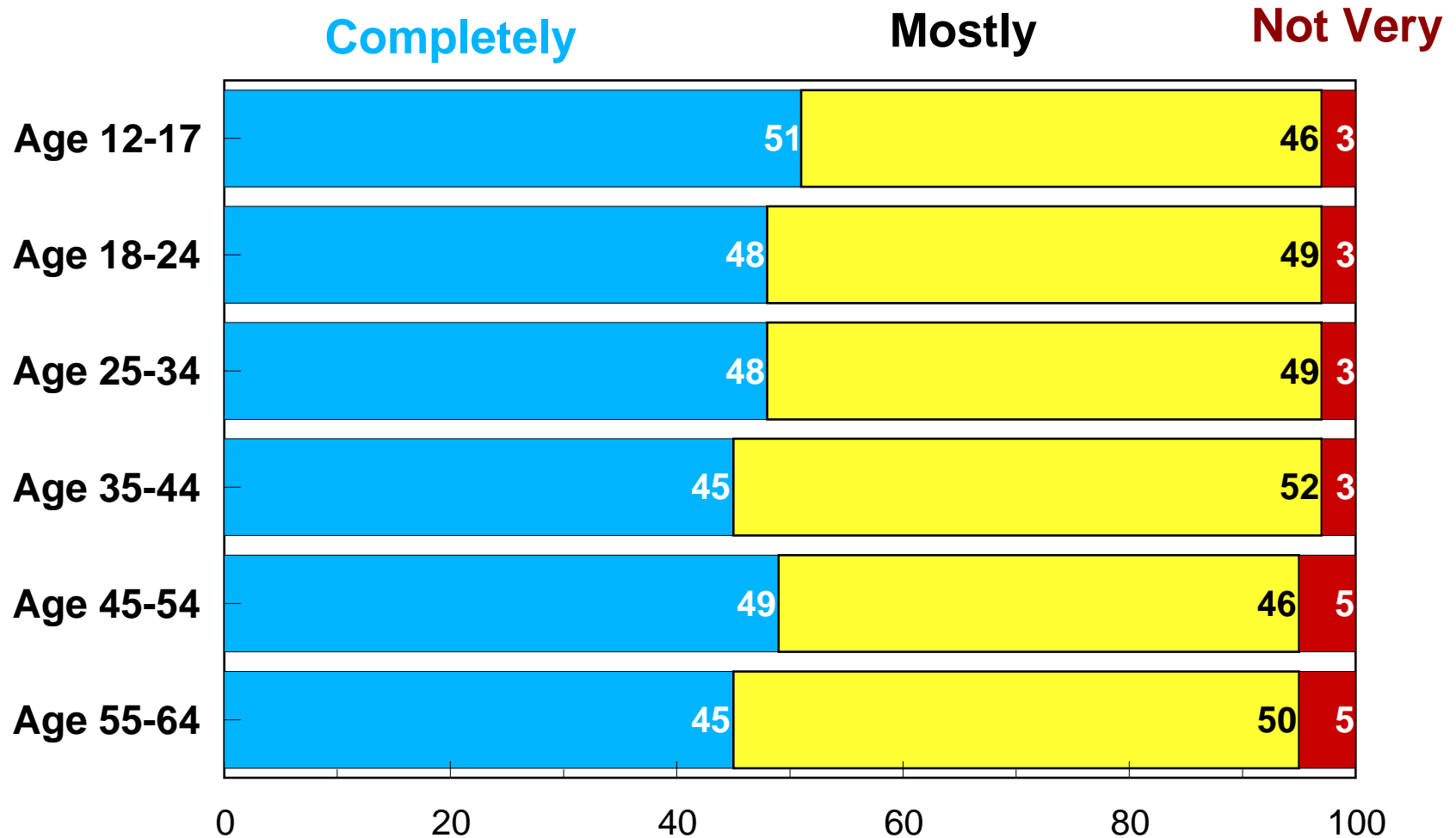
% percent



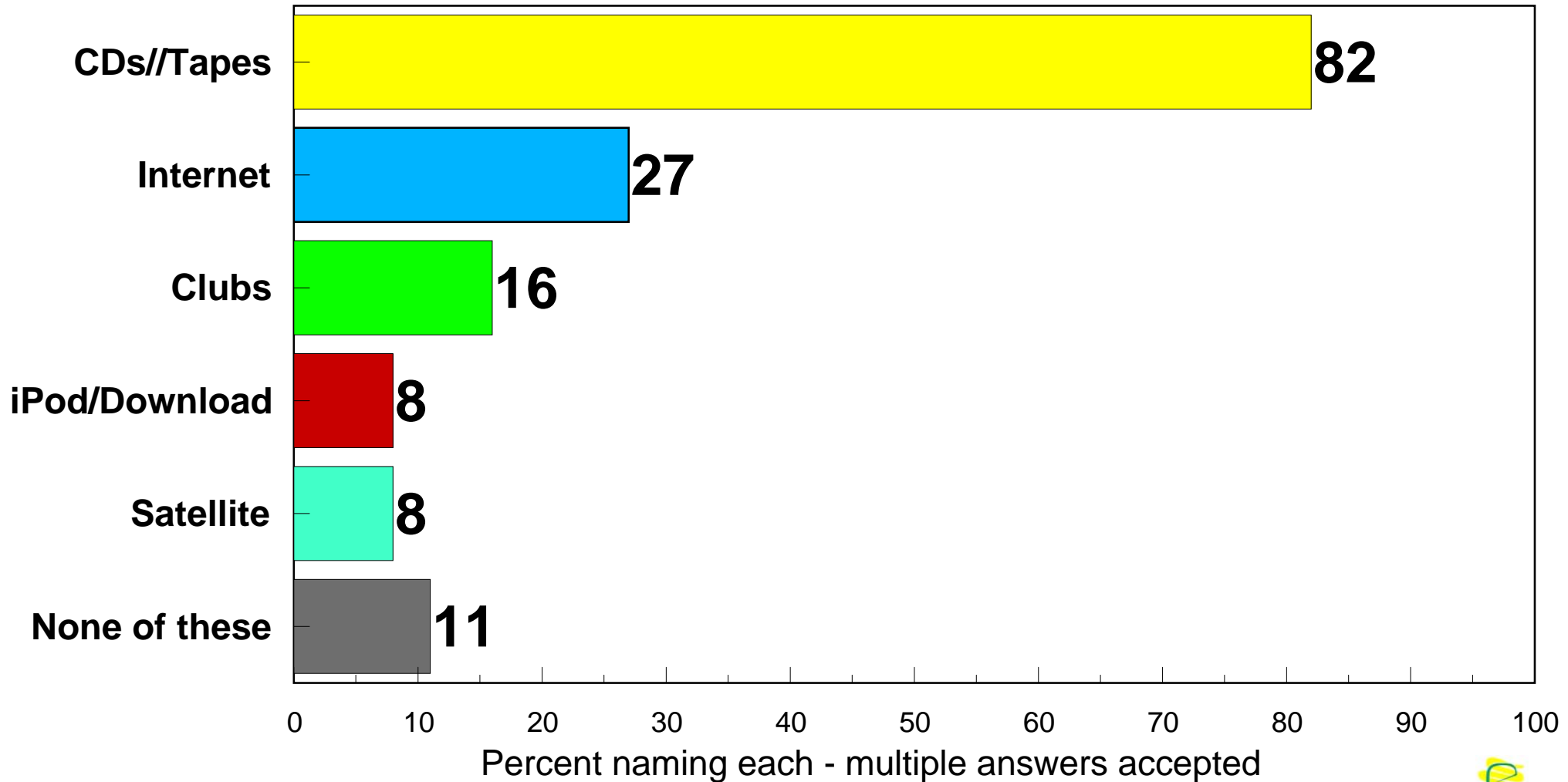
# How satisfied are you with your favorite Country station?



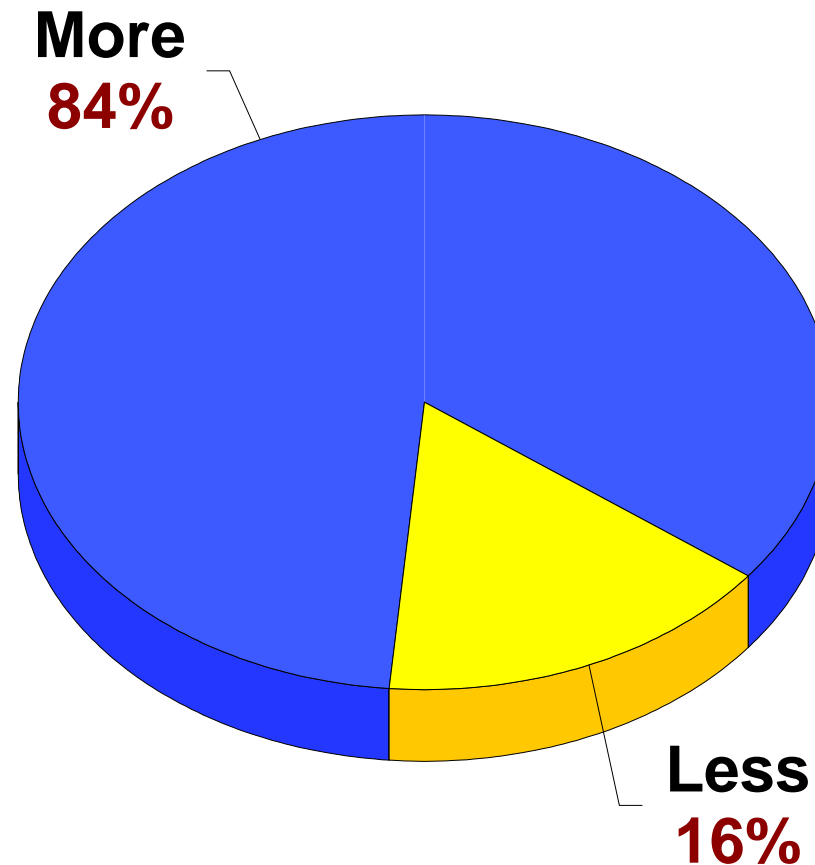
# How satisfied are you with your favorite Country station?



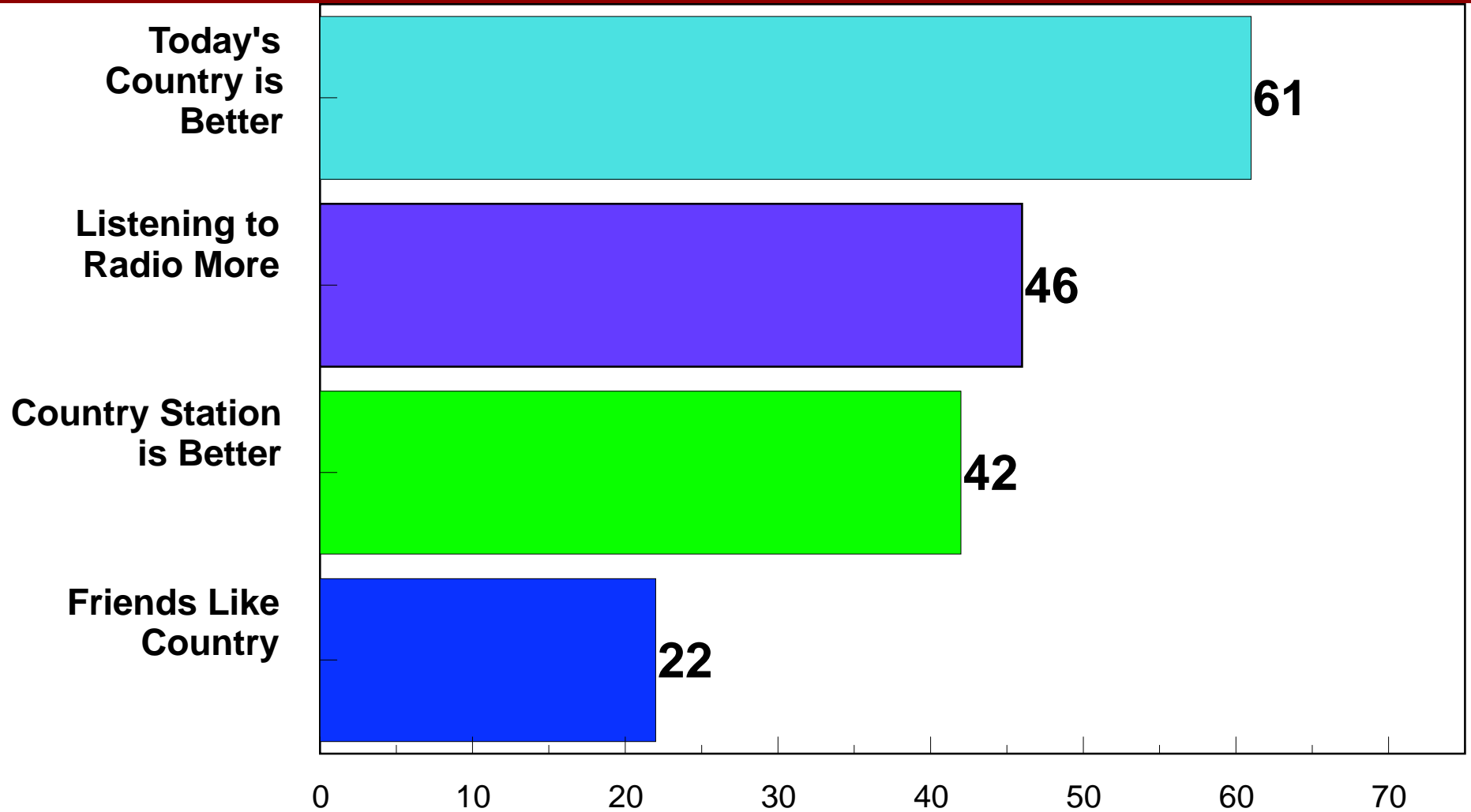
# Where do you go to hear music you like that is not on the radio?



# Are you listening MORE or LESS to Country music on the radio than you were one year ago?



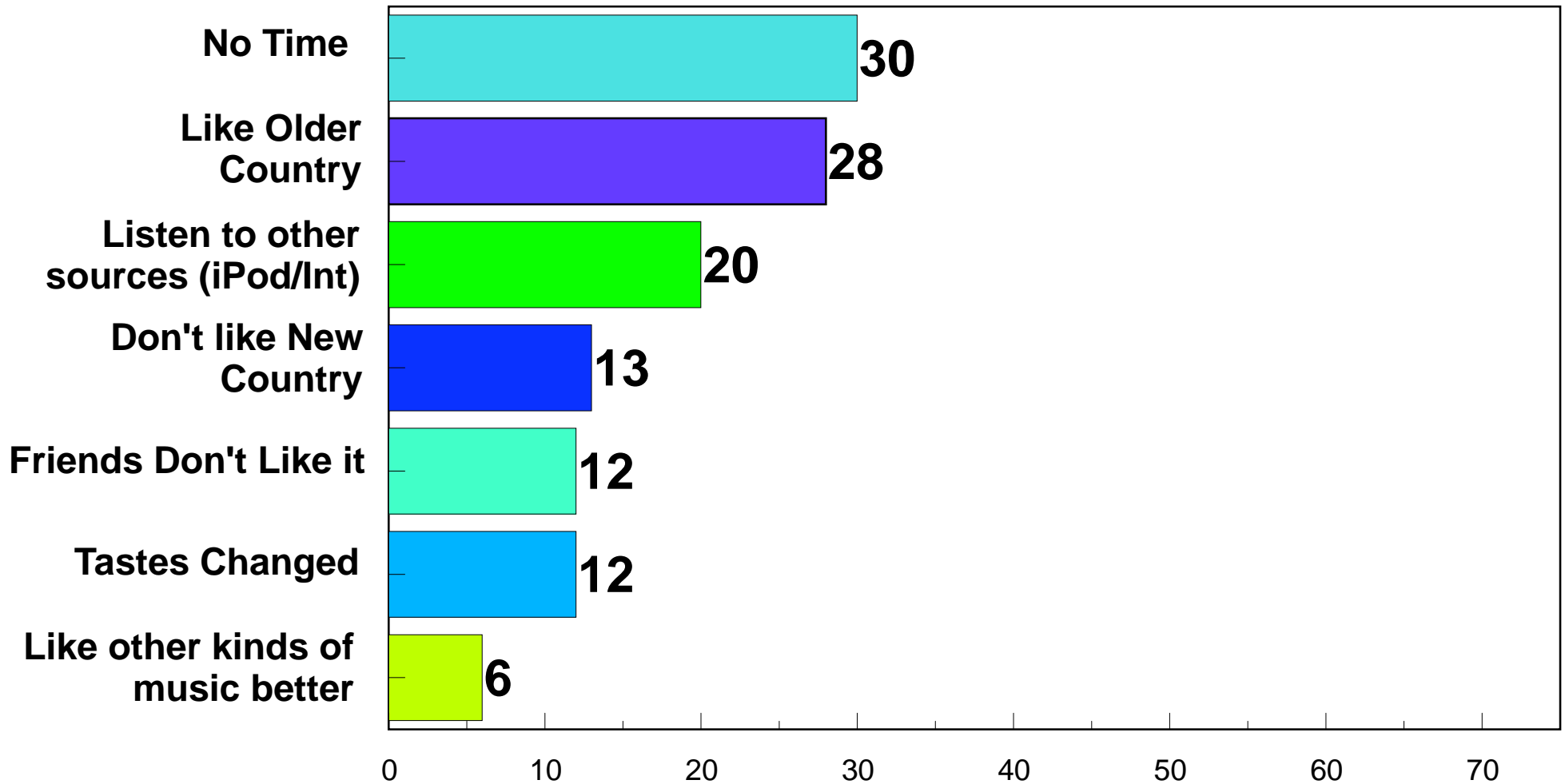
# Why are you listening to Country radio MORE than you used to?



Base: Listening more to Country music on the radio

Multiple answers accepted

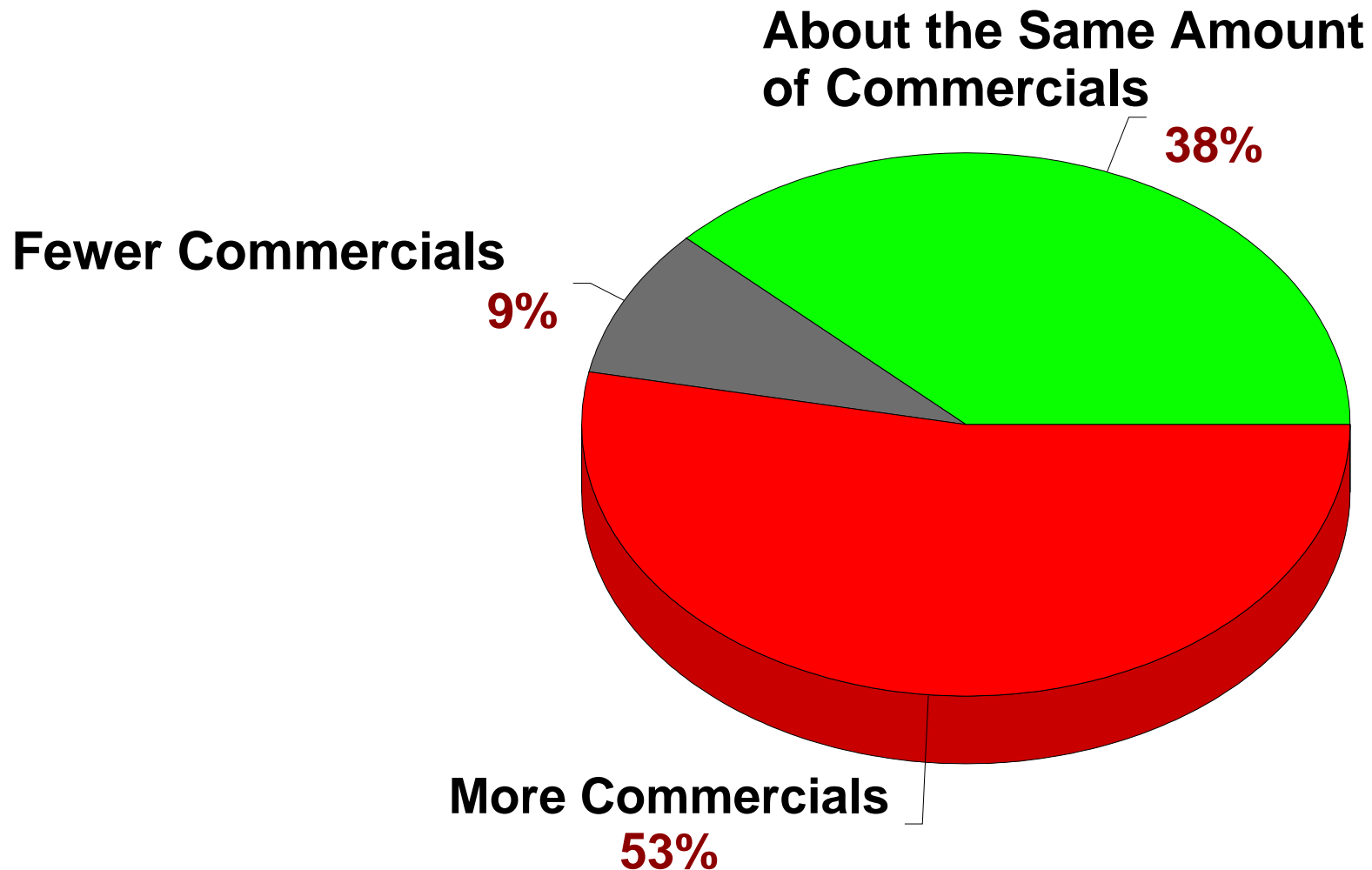
# Why are you listening to Country radio LESS than you used to?



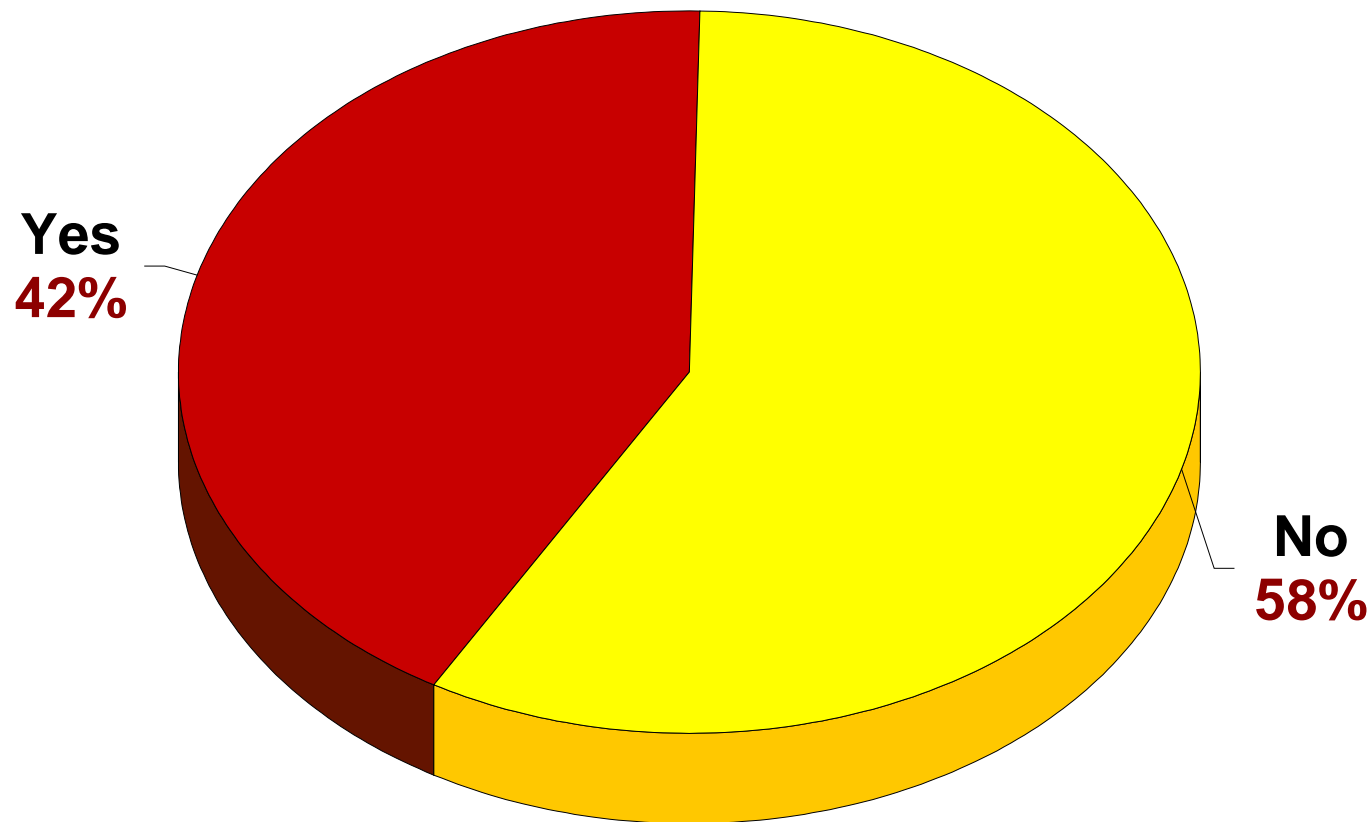
Base: Listening less to Country music on the radio

Multiple answers accepted

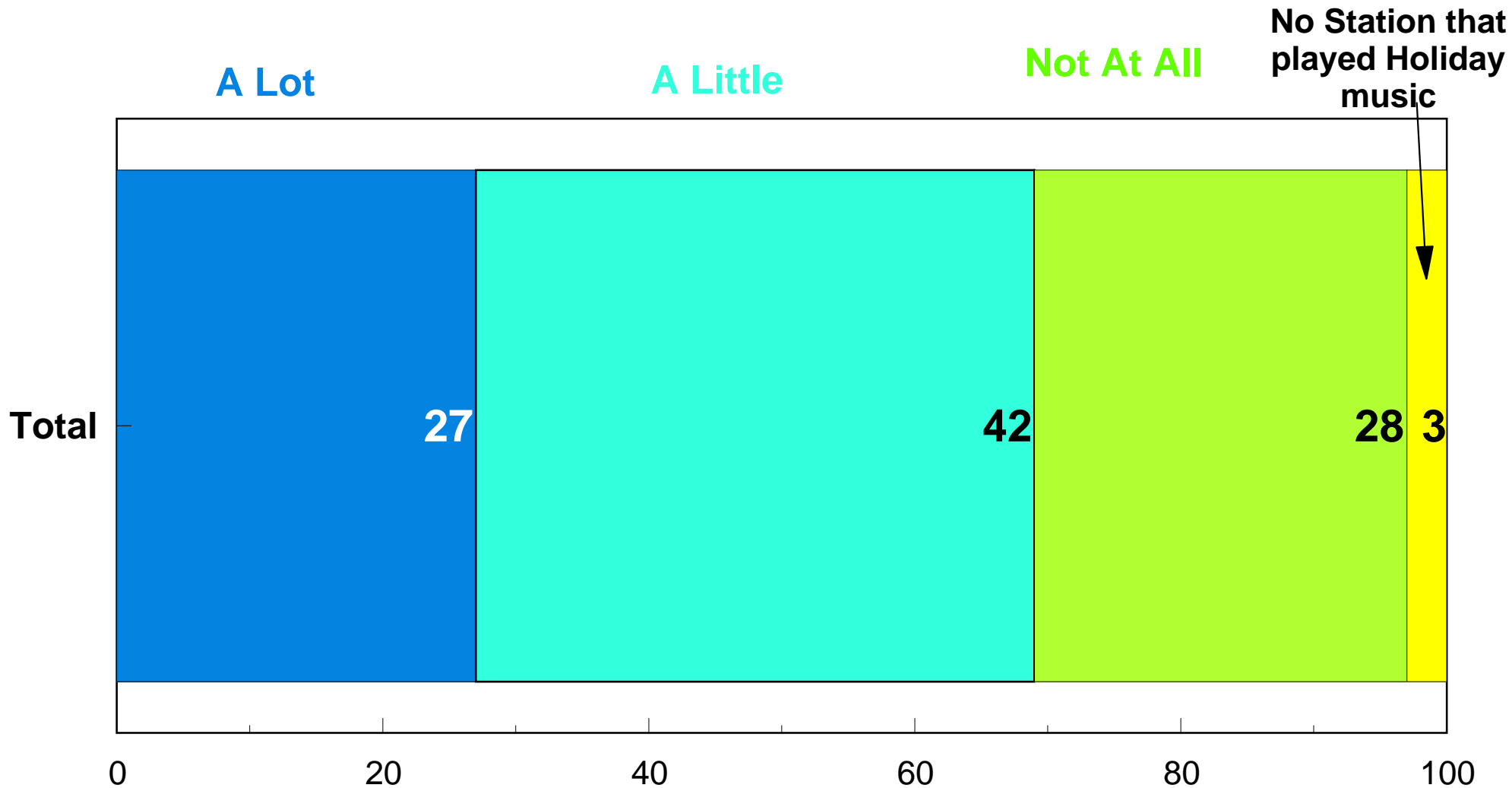
# Compared to one year ago, are radio stations playing...



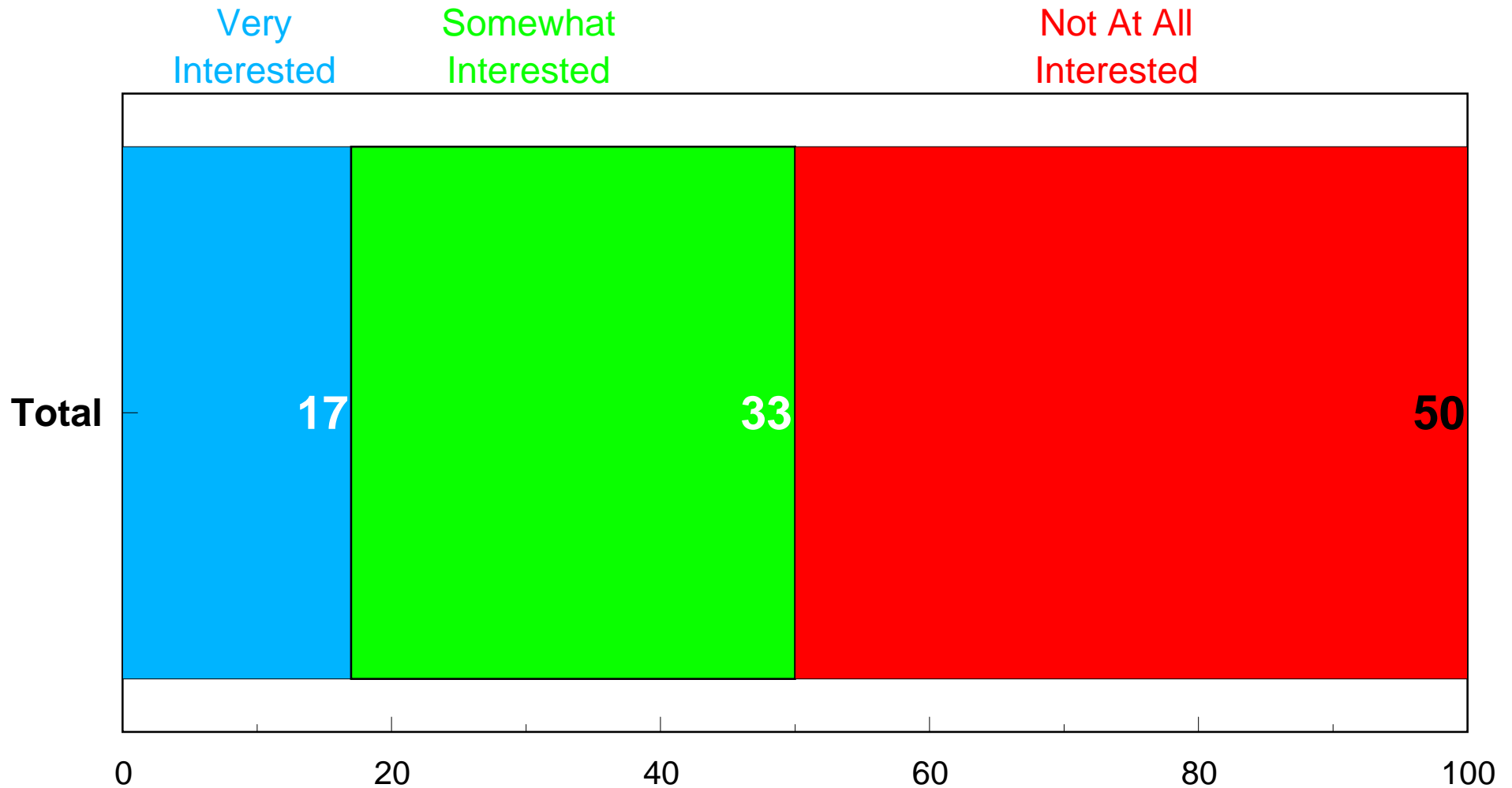
# Are you aware that some radio stations have changed their policy to play fewer commercials?



# How much did you listen to stations in your local area that played only Christmas music during the holiday season?



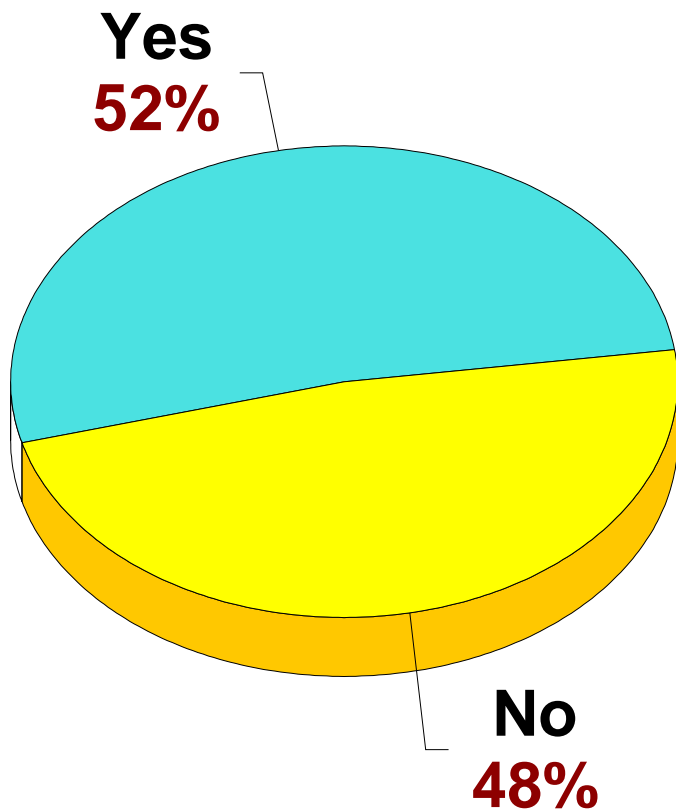
# How interested would you be in hearing only Christmas music on your favorite Country radio station throughout the holiday season?



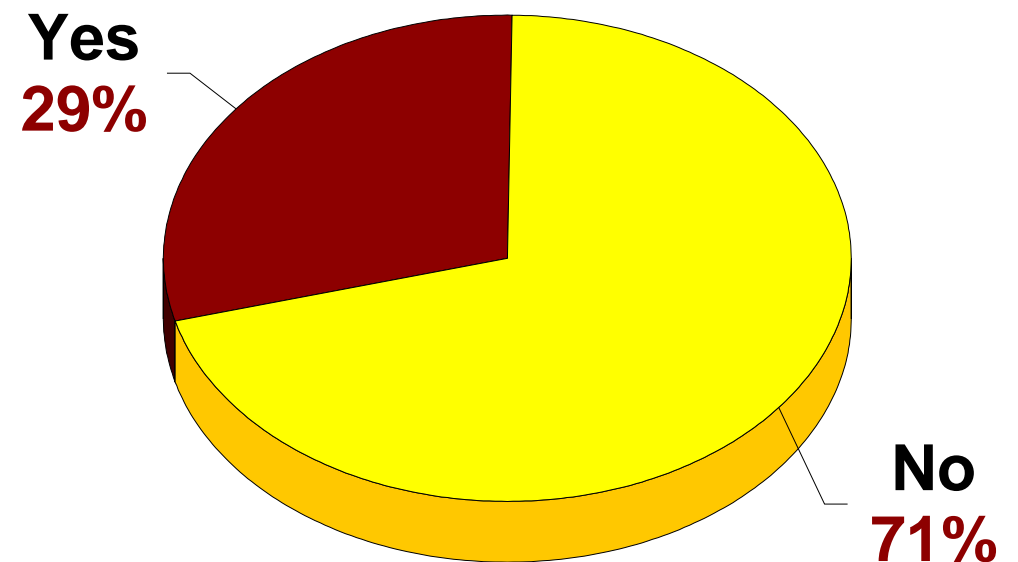
# Lifestyles and Family

# Family Status:

Are you married?

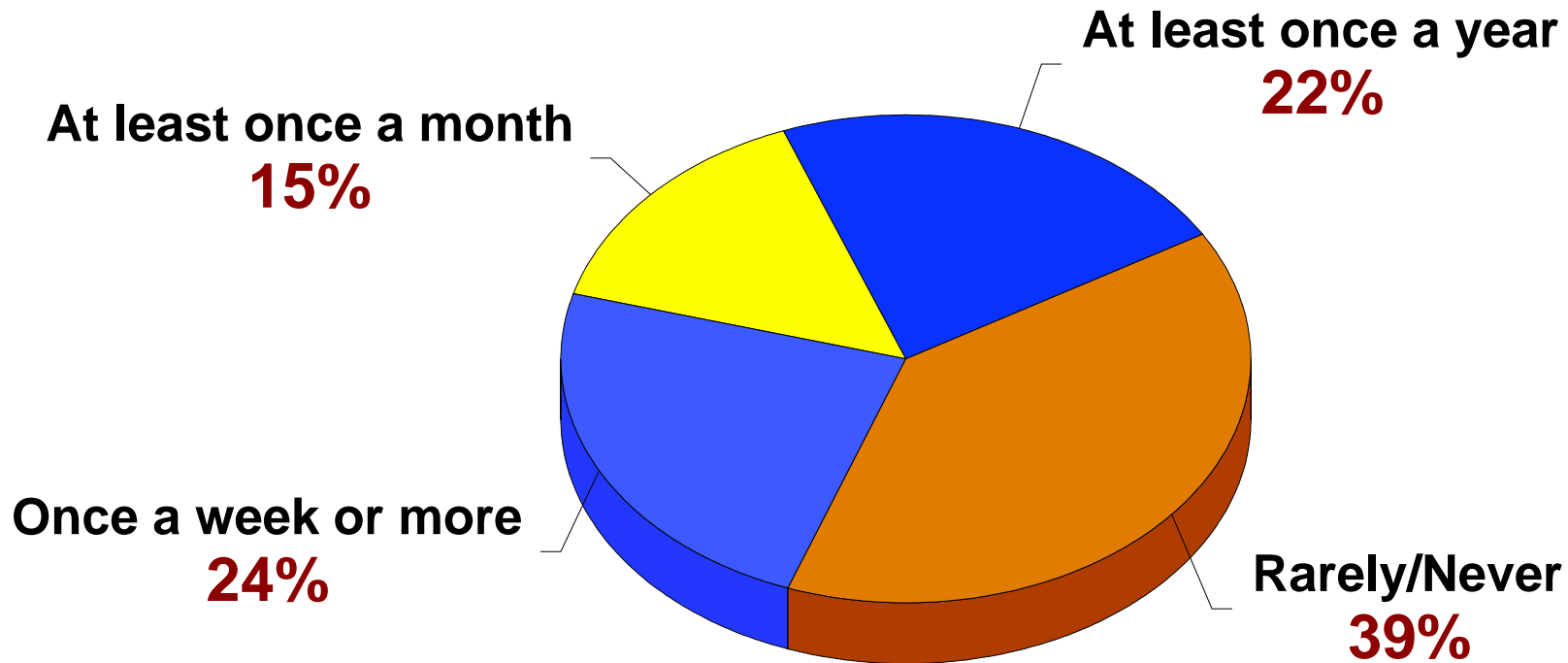


Do you have any children under the age of 13 in your household?



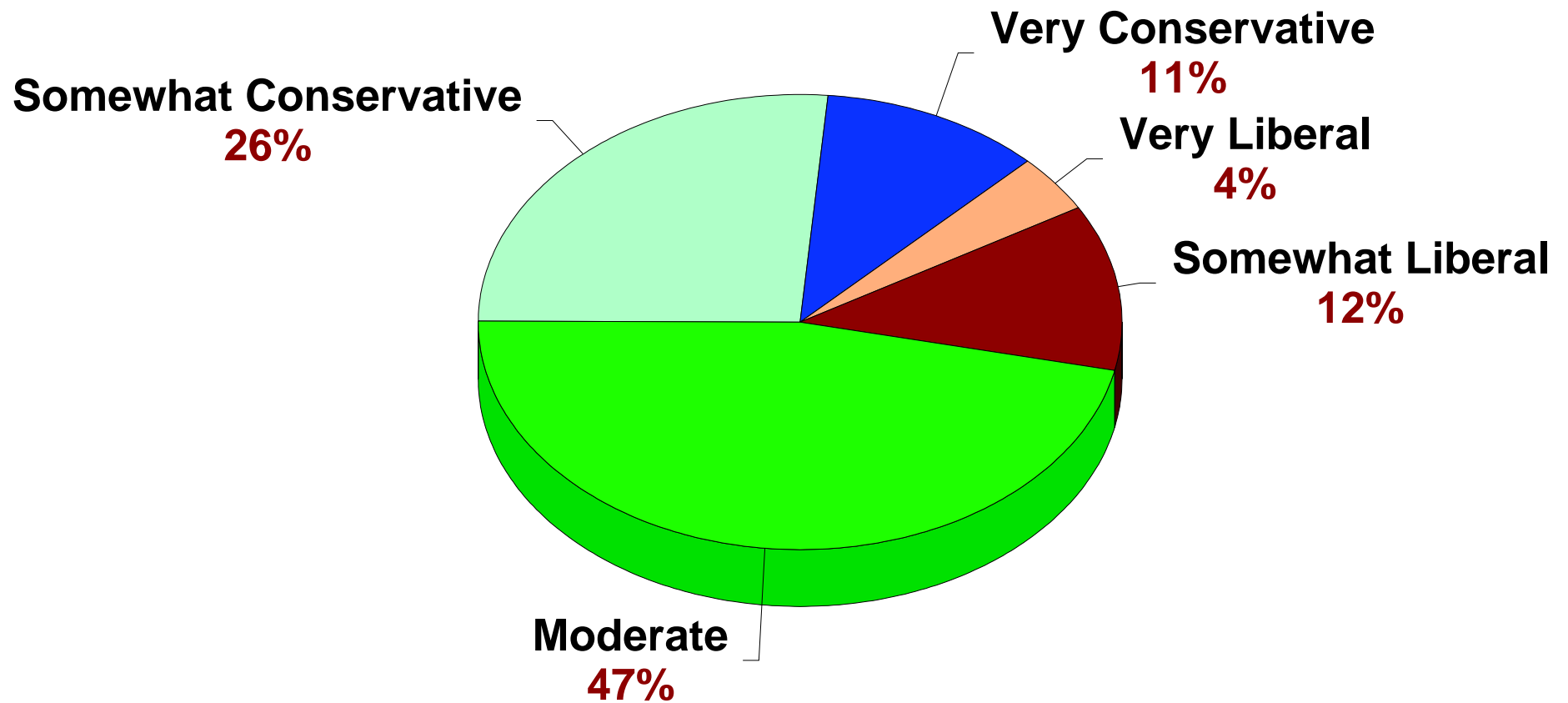


# How often do you attend religious services?



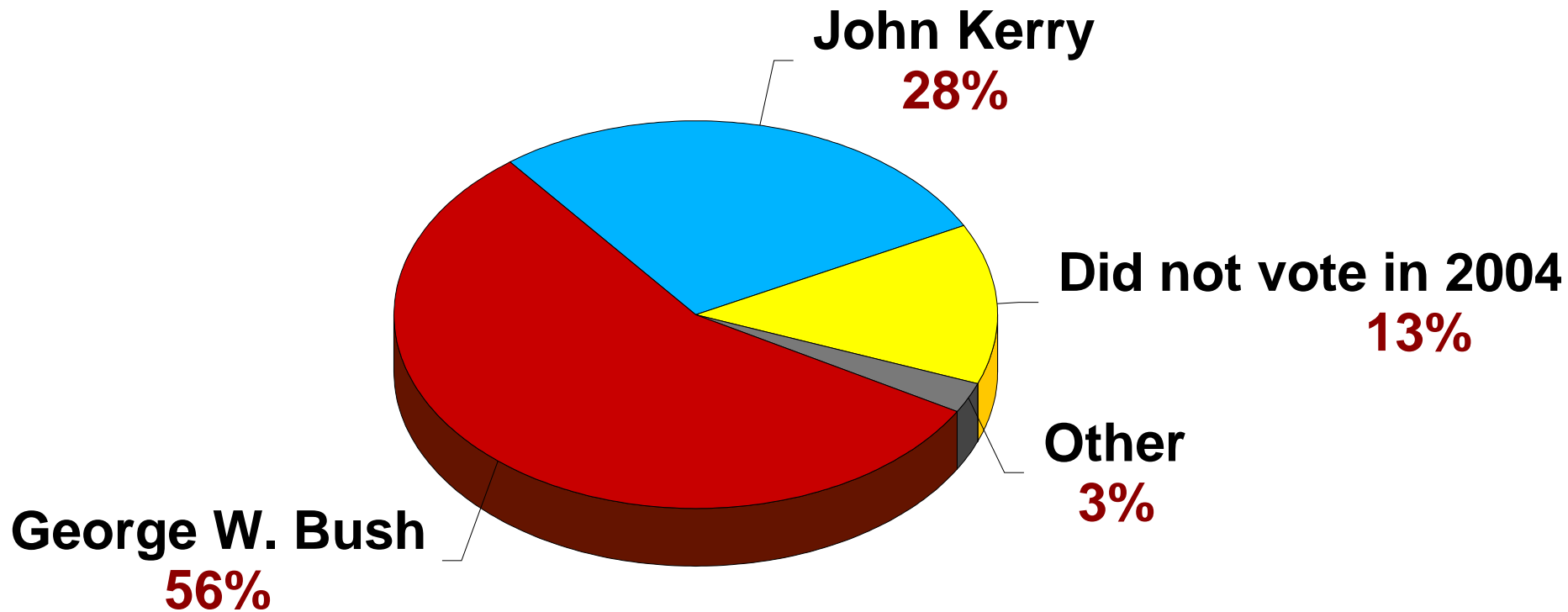


# In general, would you describe your political views as...



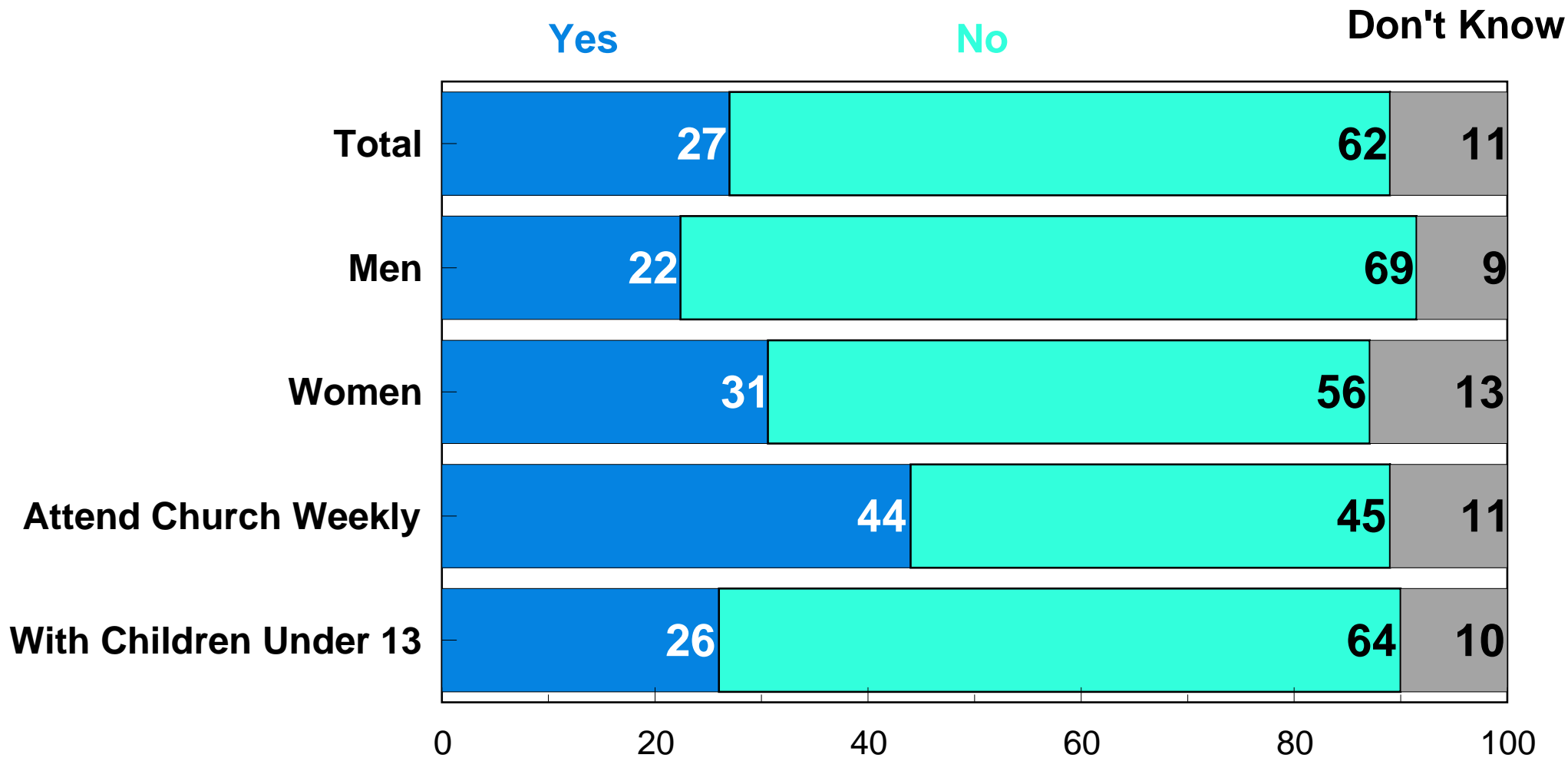
Base: Respondents over the age of 18

# For whom did you vote in the 2004 Presidential Election?



Base: Respondents over the age of 18

# Were you personally offended by the Janet Jackson Super Bowl incident in 2004?



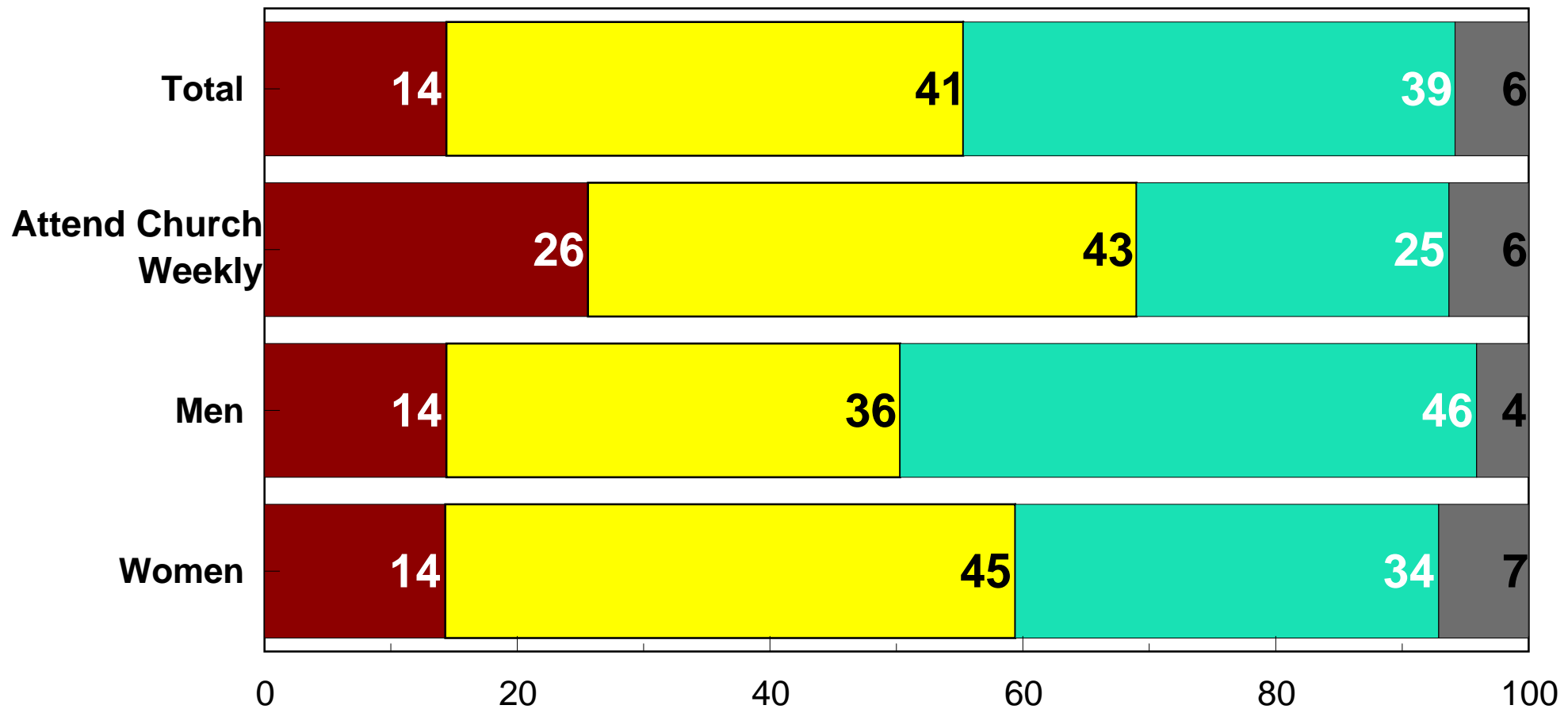
# Which statement best describes your attitude about the Janet Jackson/ Super Bowl incident?

It's an important issue; the government needs to ensure it doesn't happen again

It's an important issue; but not worthy of government involvement

It's not that important of an issue

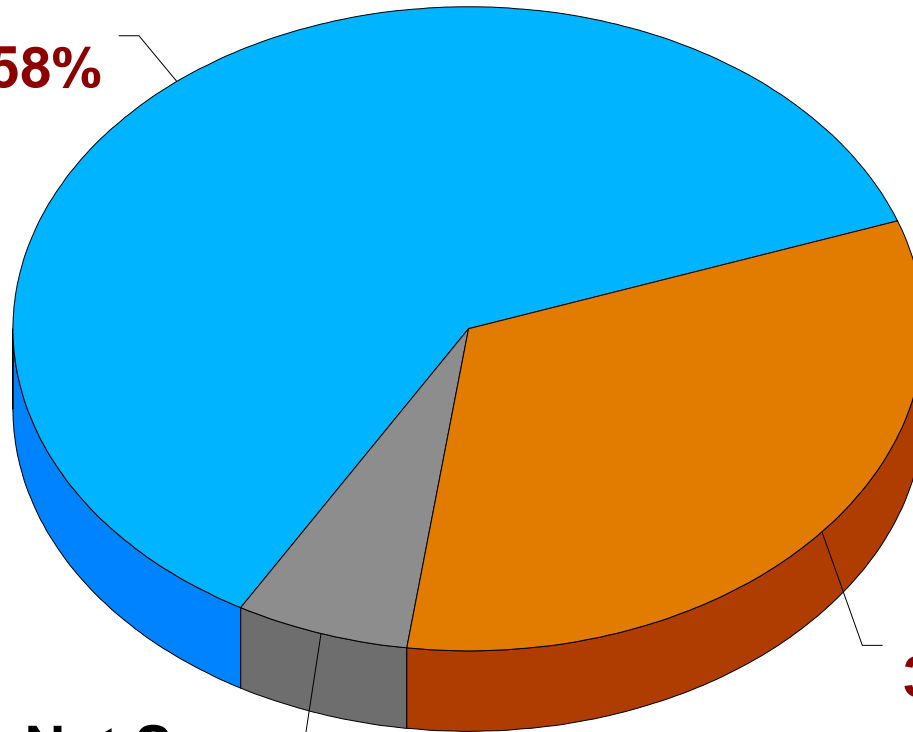
Not Sure



# Which statement best describes who you feel is responsible when it comes to radio programming/listening?

It is the parents' responsibility to keep material they find indecent away from their children

58%



It is the broadcasters' responsibility to eliminate indecent material from the airwaves so children can't hear it

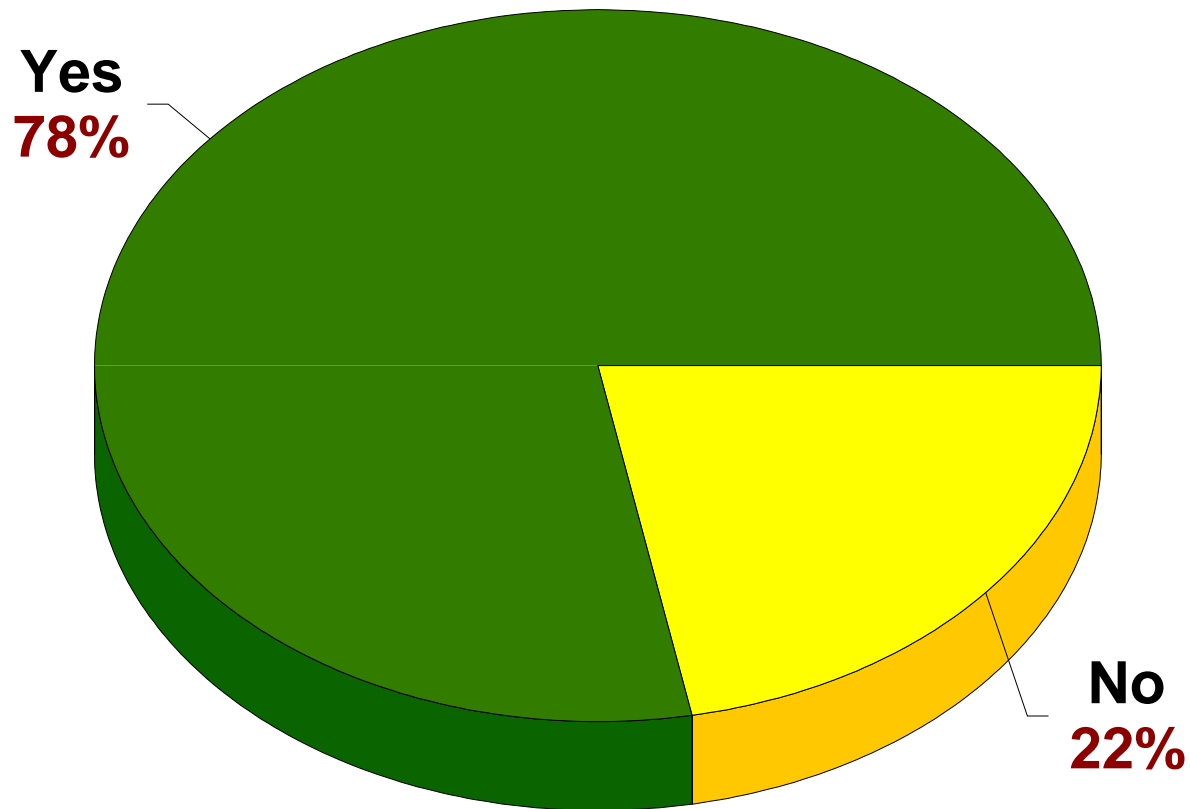
31%

Not Sure

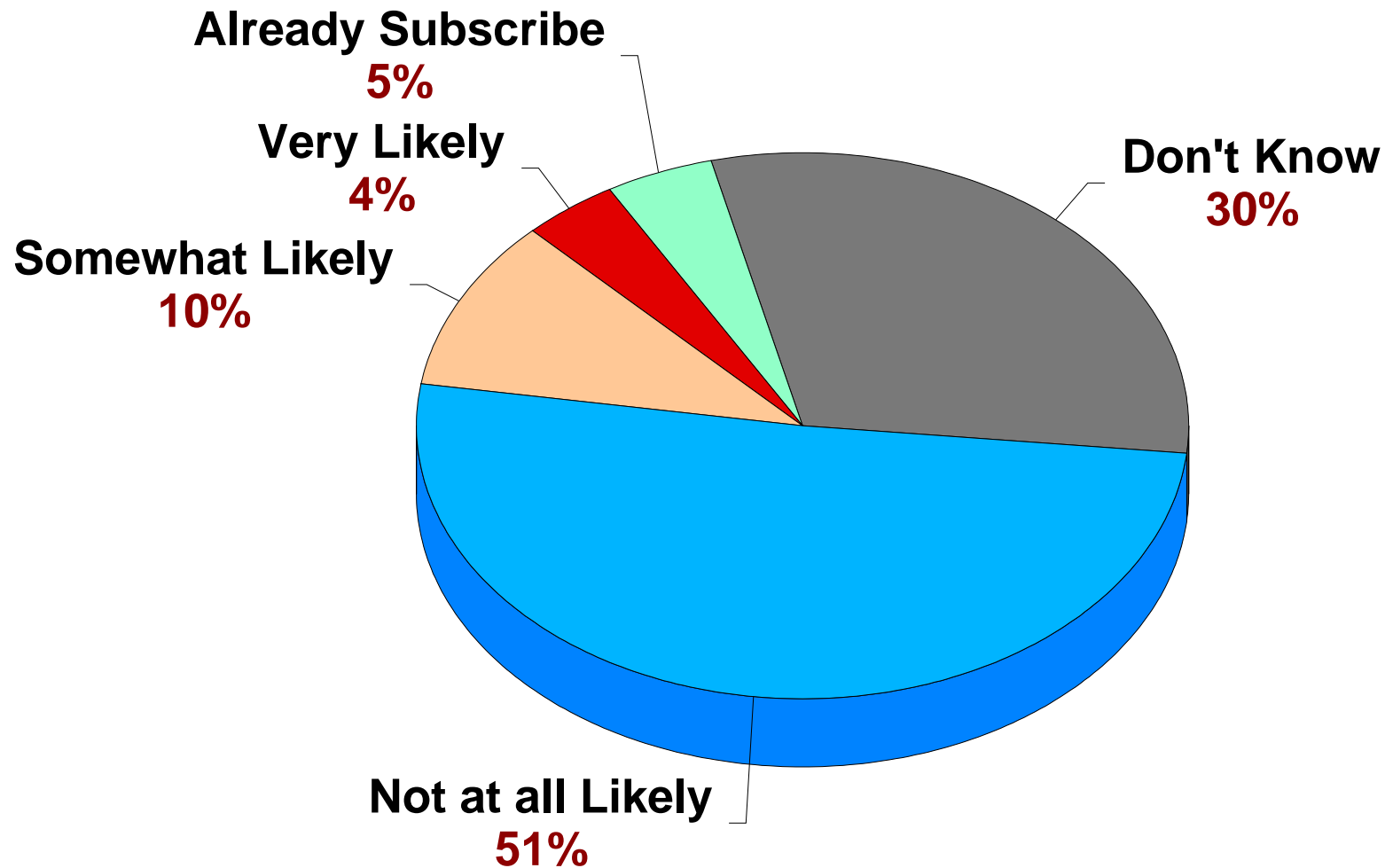
6%

# Technology and Consumer Behavior

# Have you ever heard of Satellite Radio Services XM or Sirius?



# How likely are you to subscribe to either XM or Sirius satellite radio services within the next 12 months?



# How do the Country stations you hear on regular radio compare to the Country stations you hear on Satellite radio?

Country Stations on regular radio and satellite radio are about the same

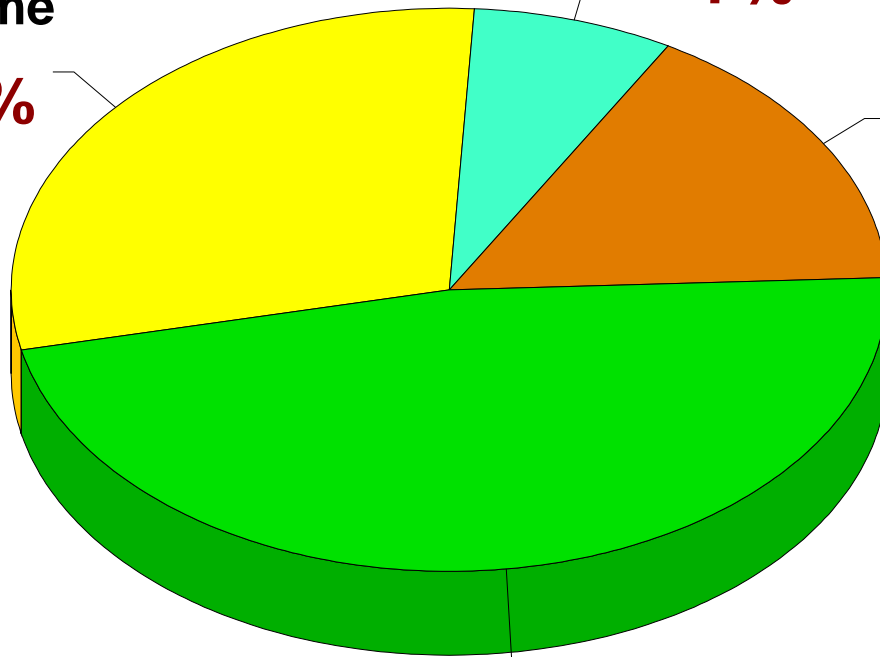
29%

Not Sure

7%

Regular Country radio is better

16%

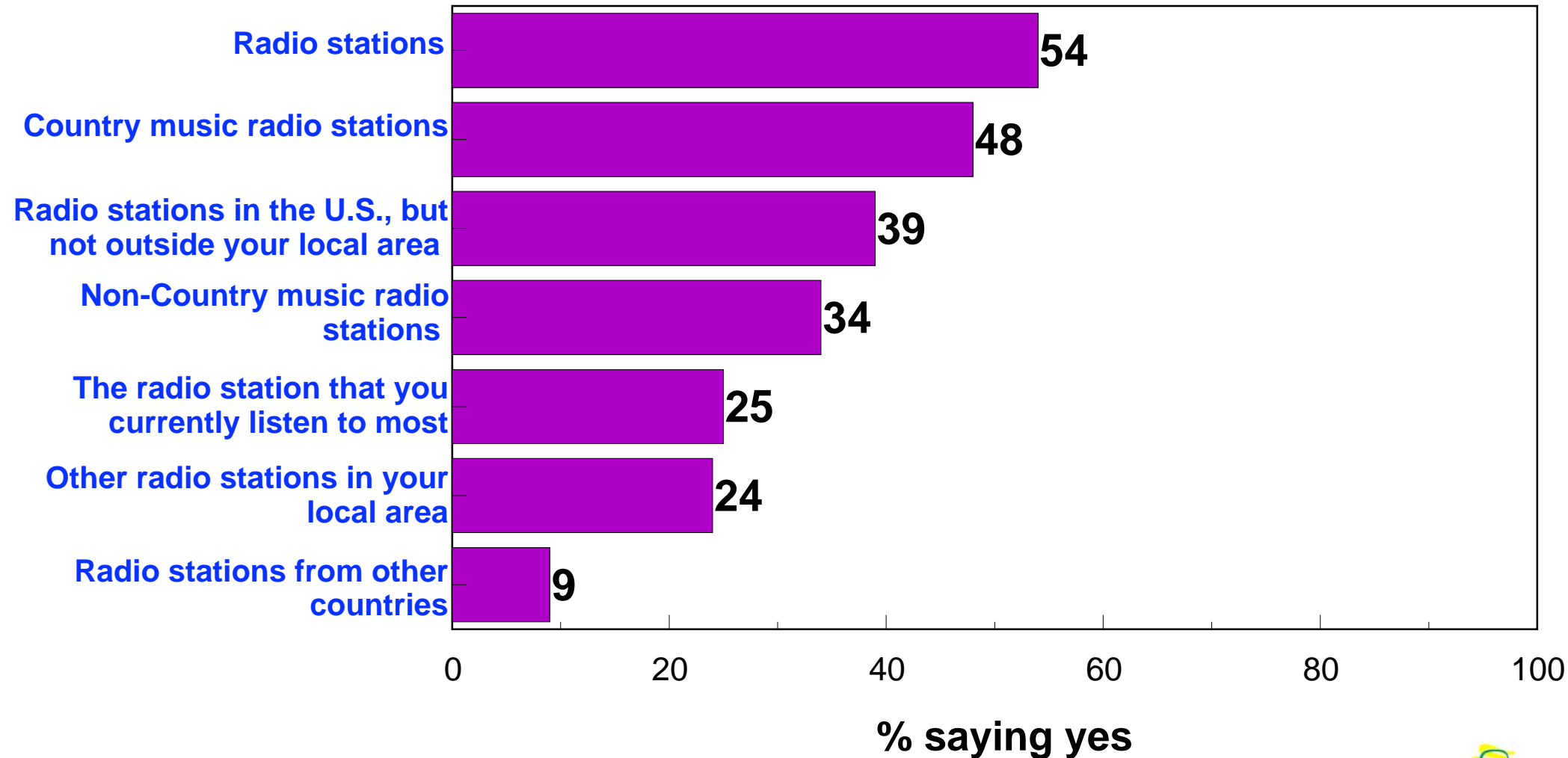


Satellite Country radio is better

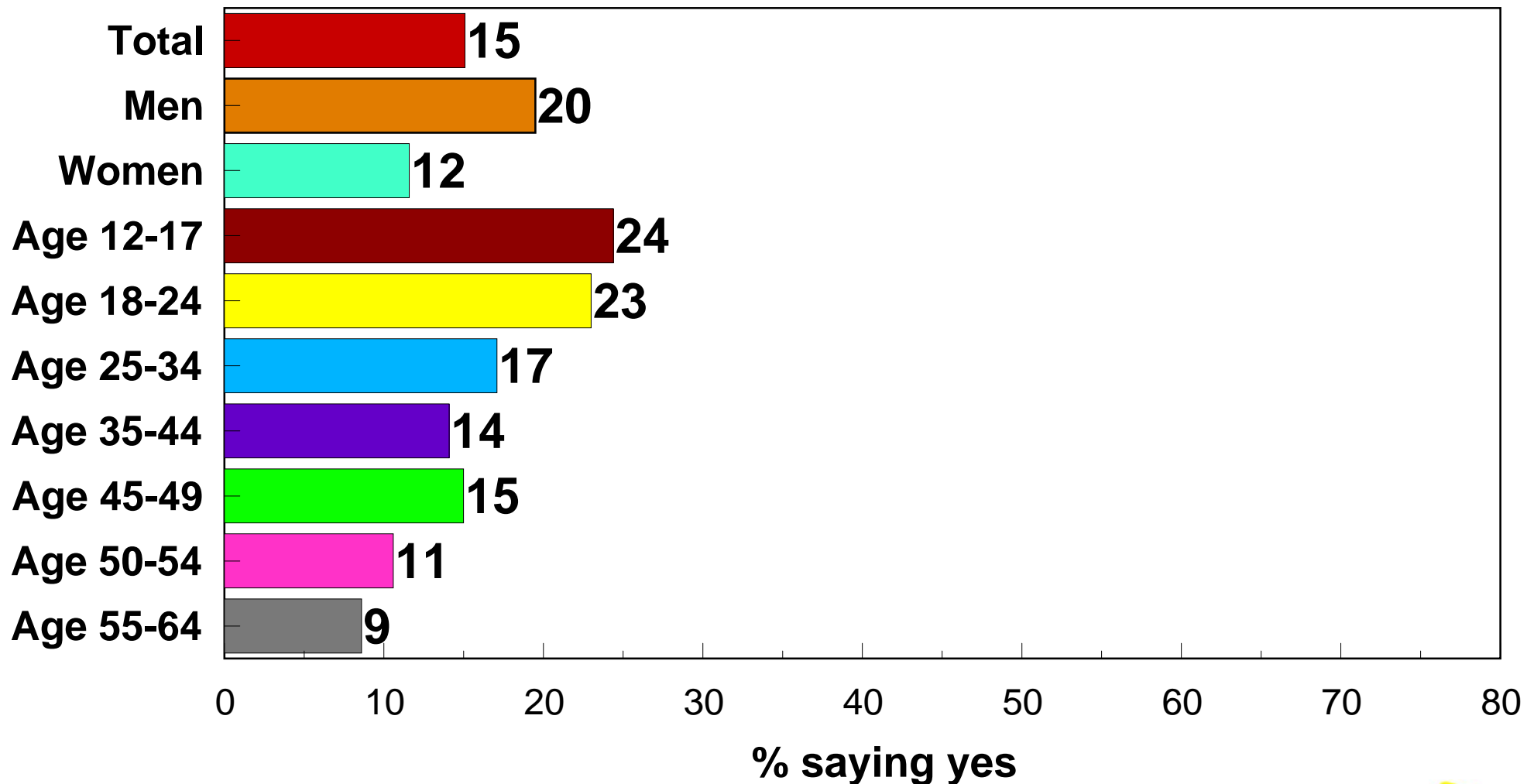
47%

Base: Subscribe to Satellite radio N=509

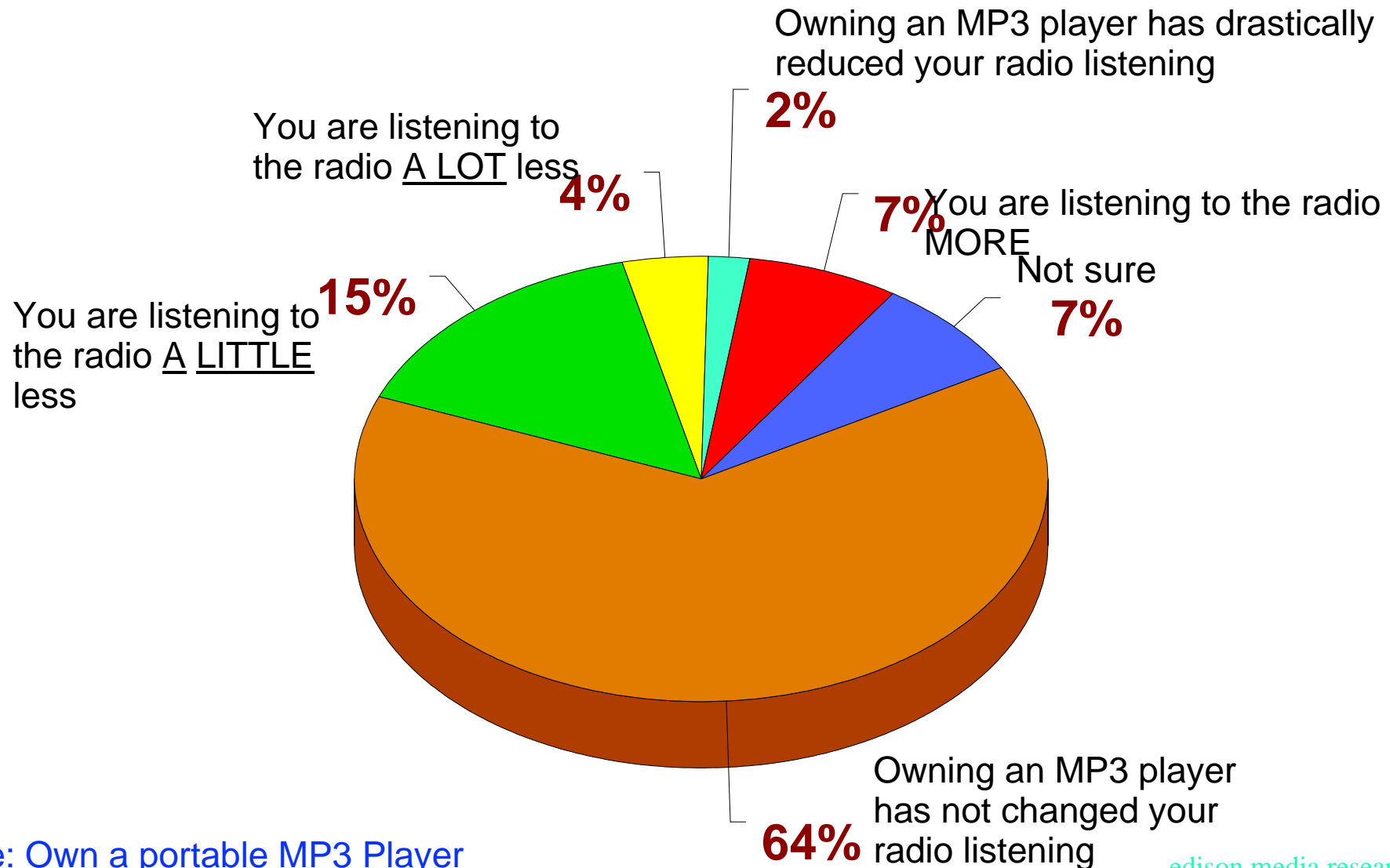
# Through the Internet, have you ever listened to...?



# Do you own an iPod or other portable MP3 player?

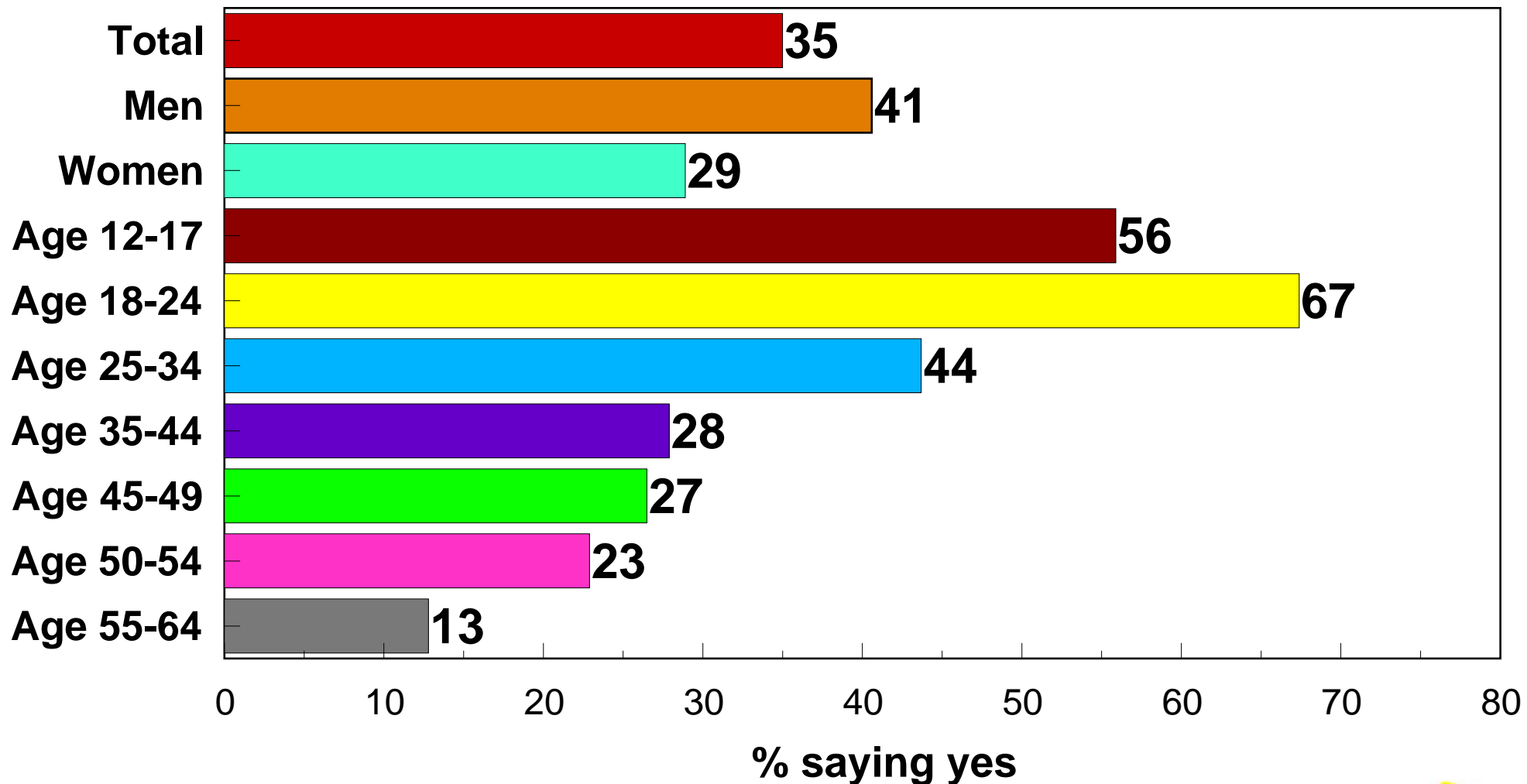


# Which of the following statements best describes how your radio listening has changed since you have owned a portable MP3 audio player?

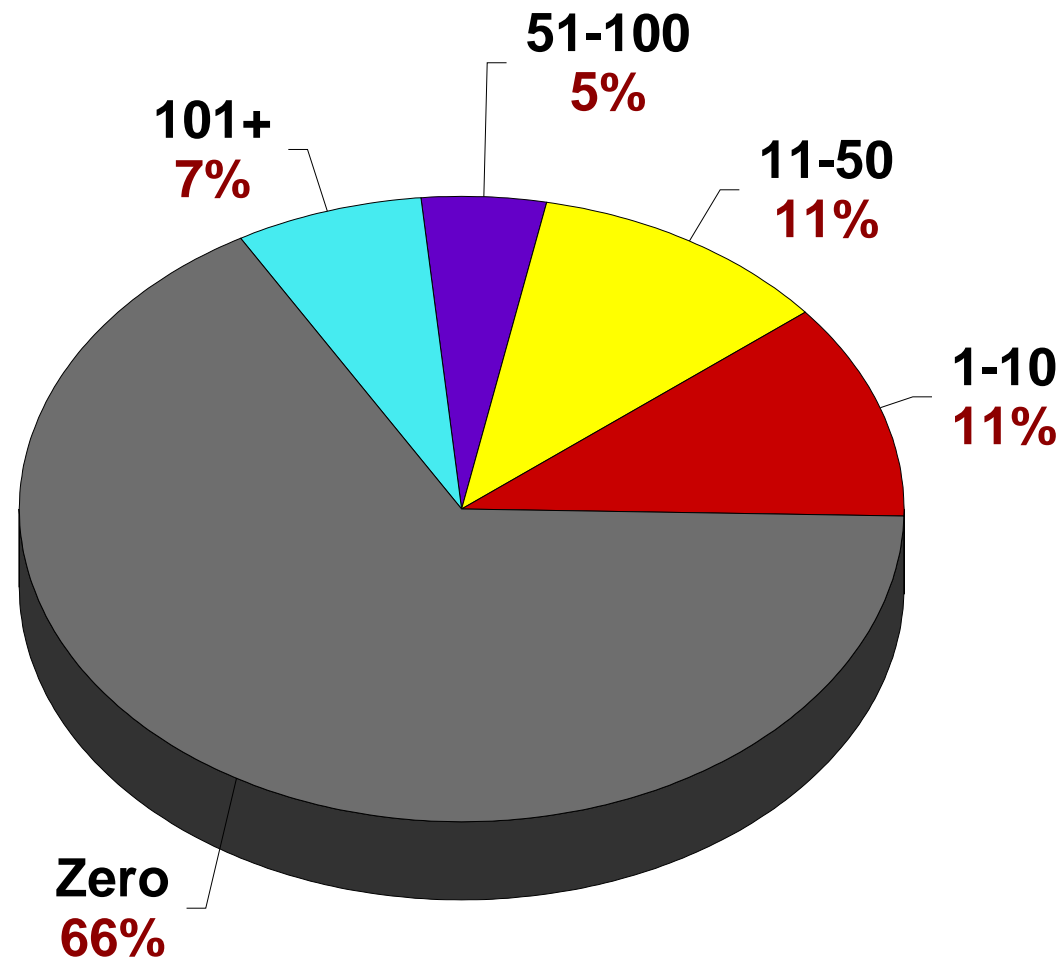


Base: Own a portable MP3 Player

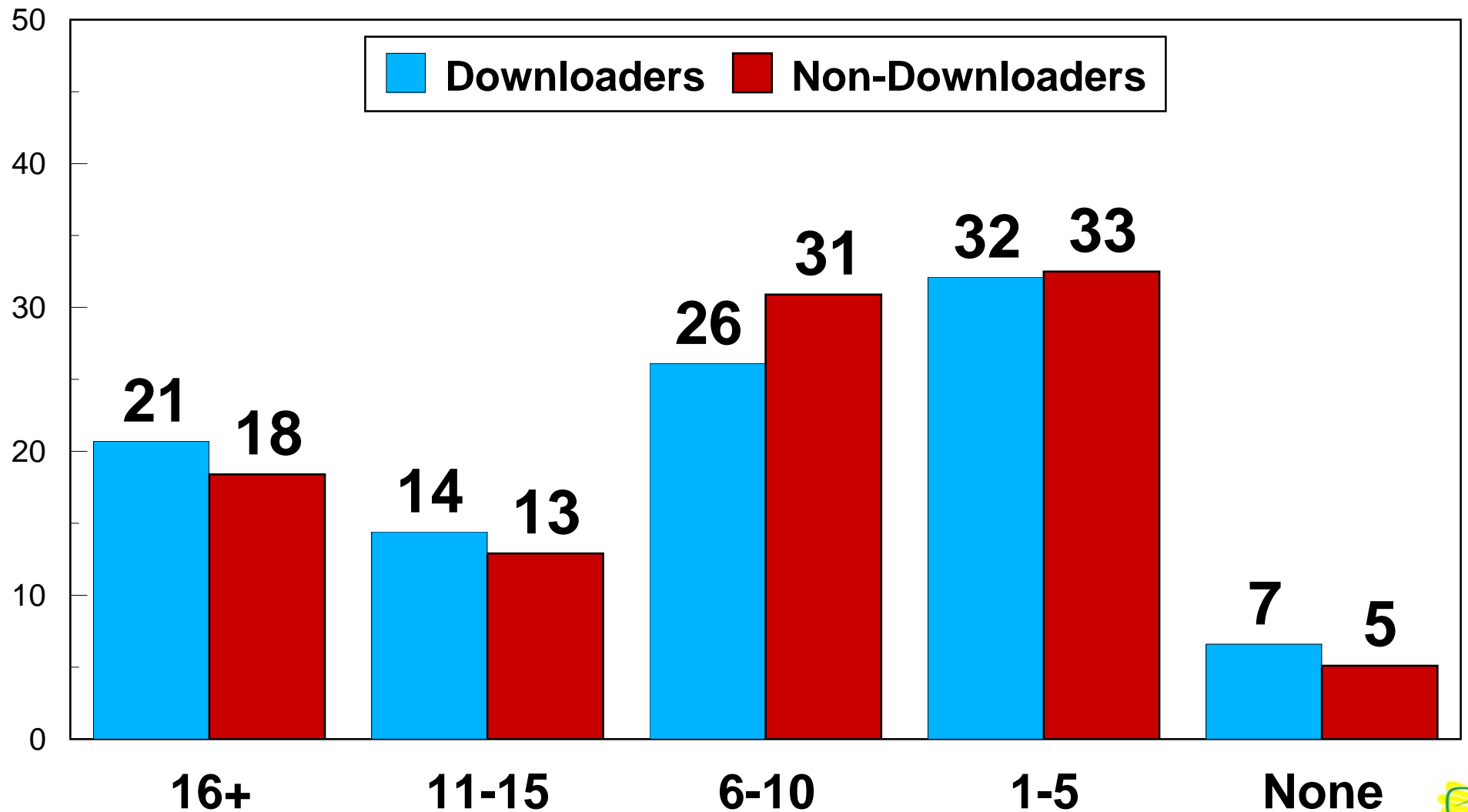
# Have you ever downloaded music files from the Internet, such as MP3 files, for playback at another time?



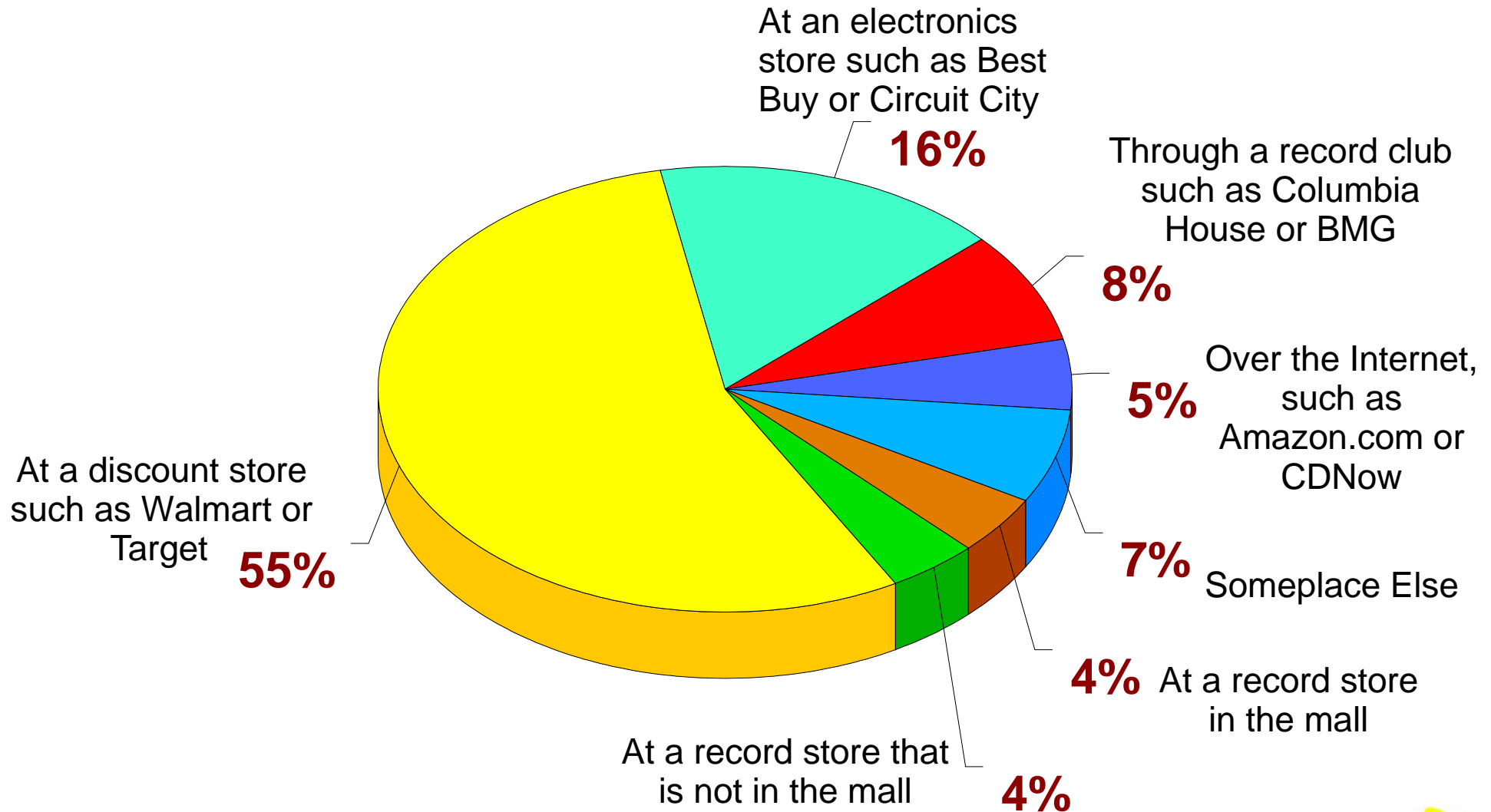
# Approximately how many songs have you downloaded from the Internet?



# Approximately, how many music CDs have you bought in the past 12 months?

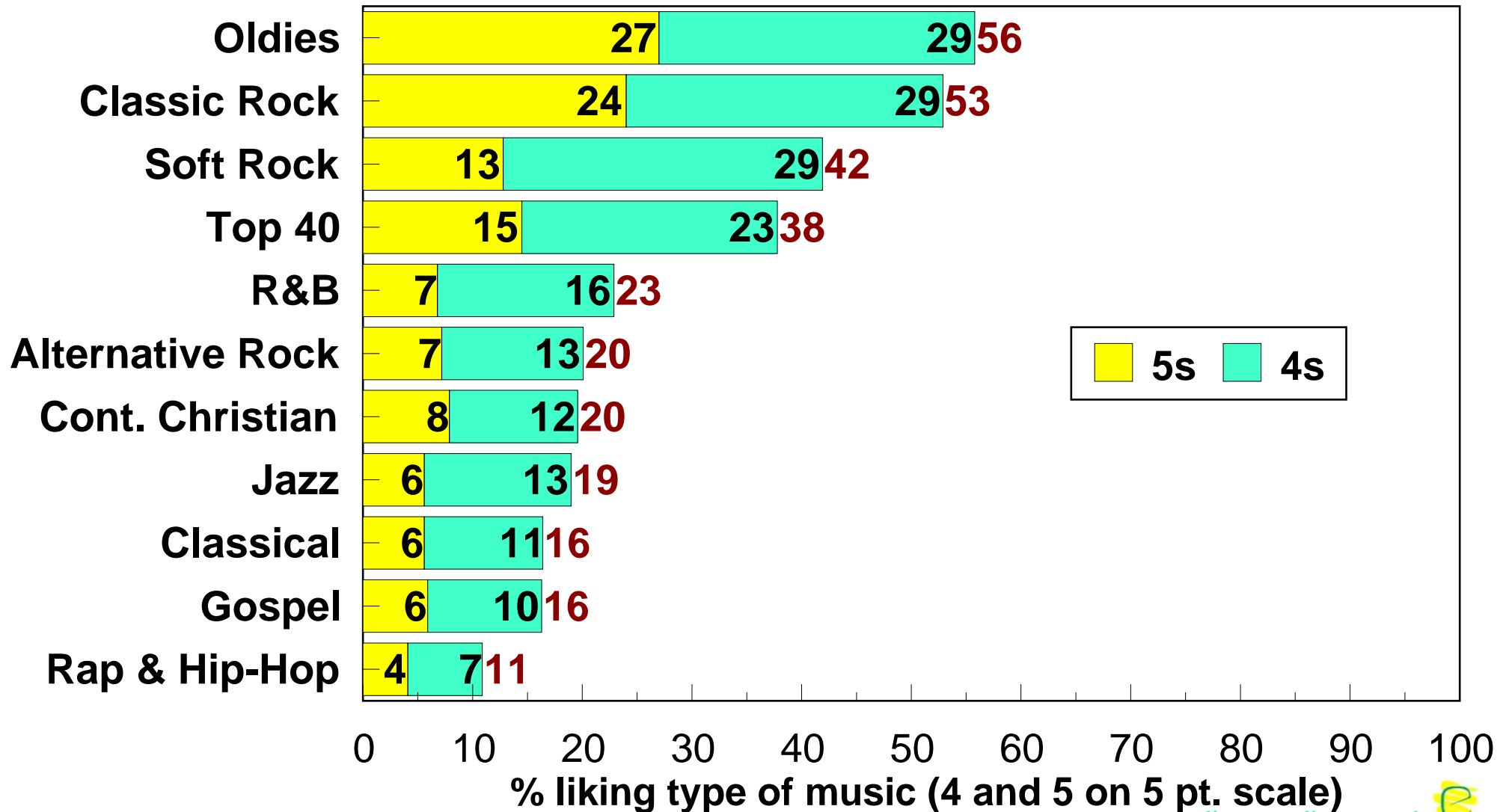


# Where do you buy most of your music?

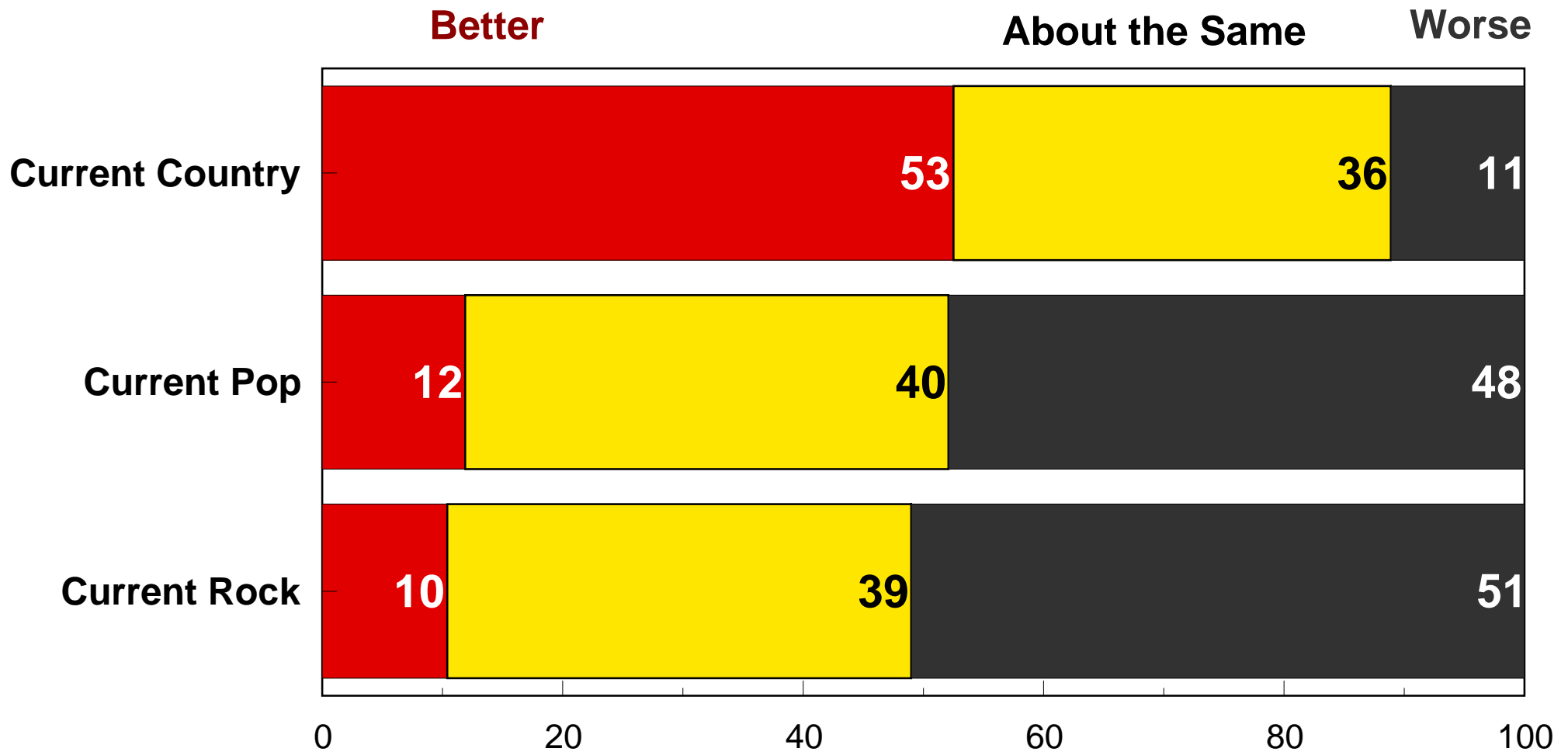


# The Music

# What other music types do Country P1s like listening to?



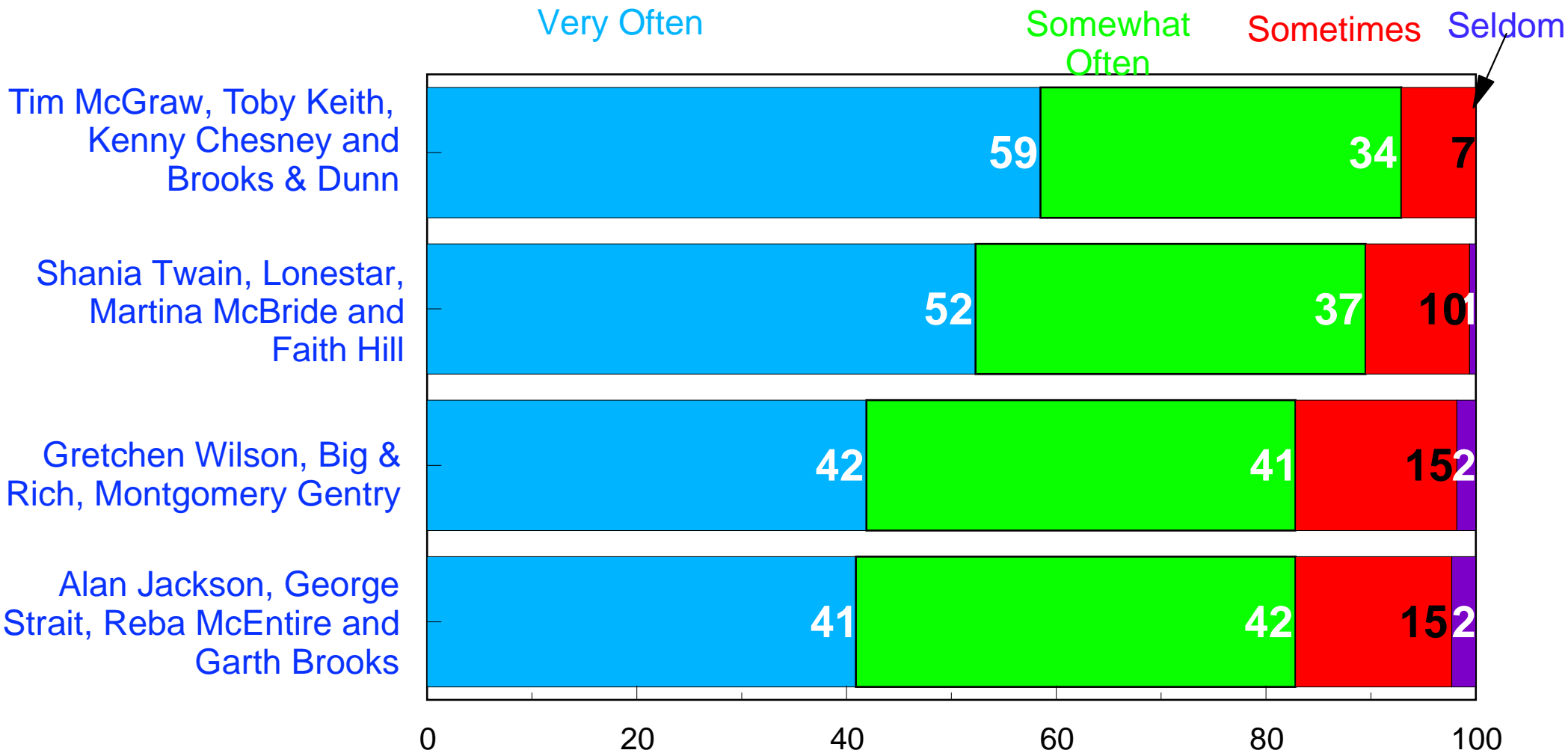
# In general, would you say that... coming out today is better, worse or the same than it was a few years ago?



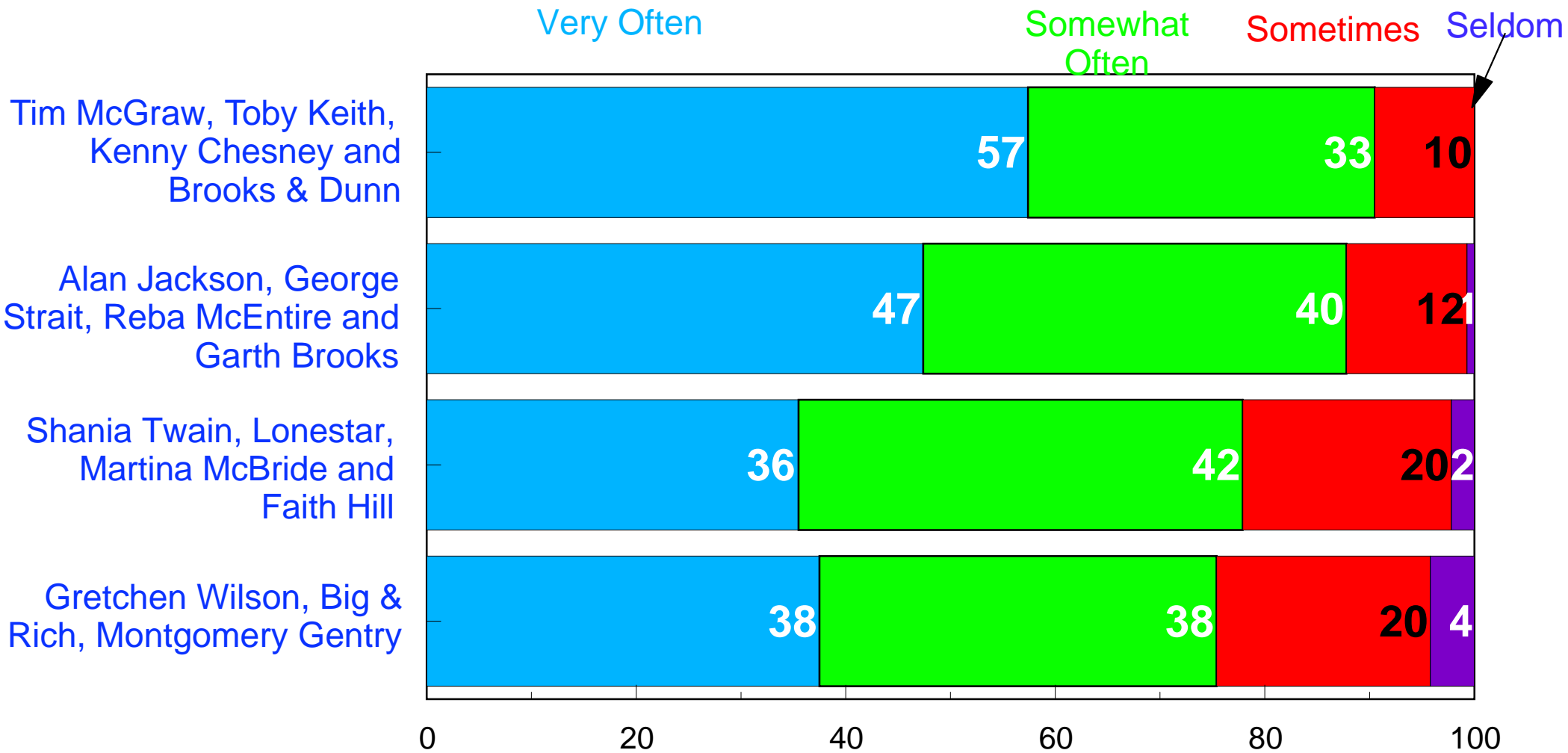


# The Artists

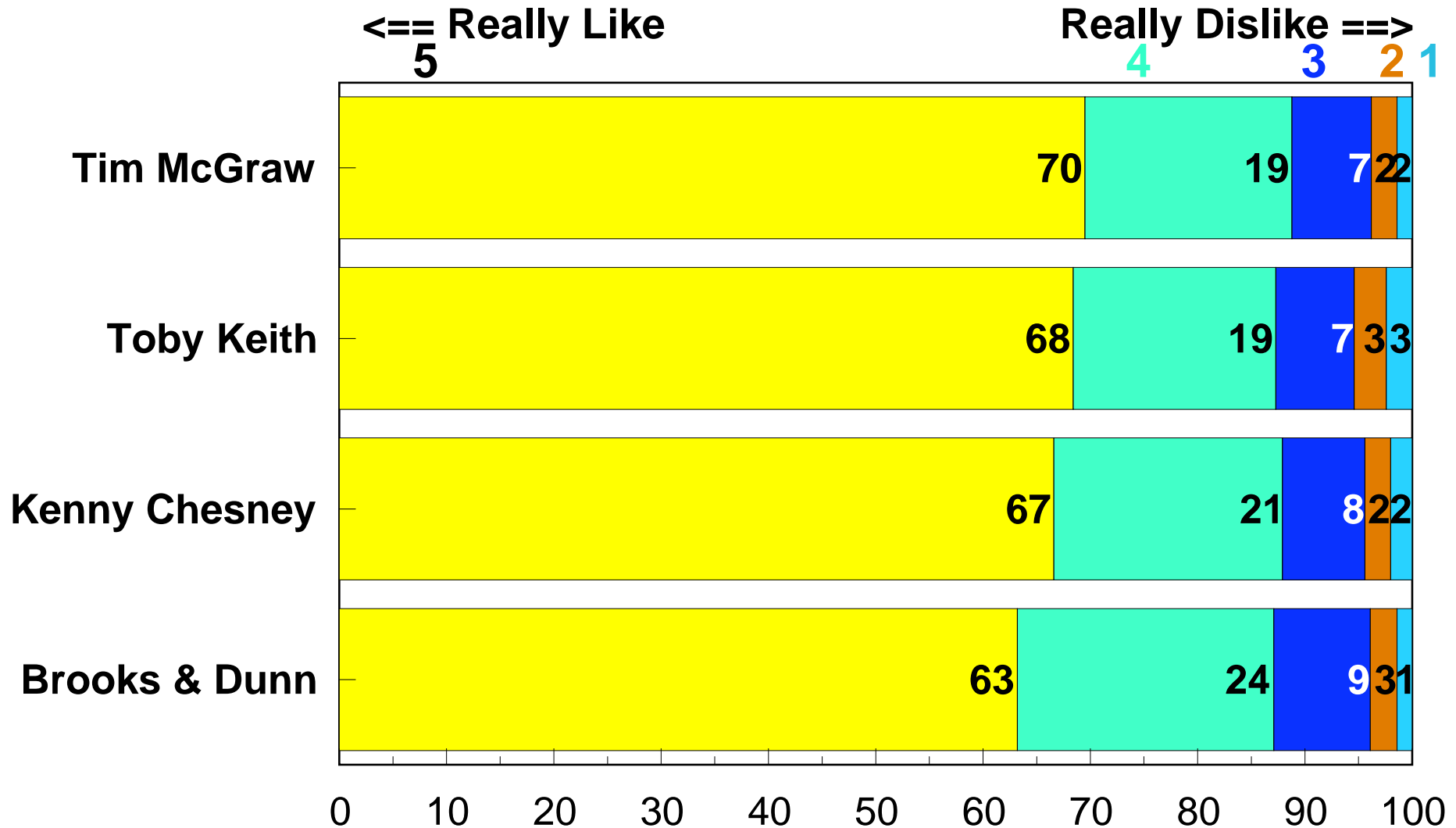
# How often does your favorite station for Country music feature music from artists like...?



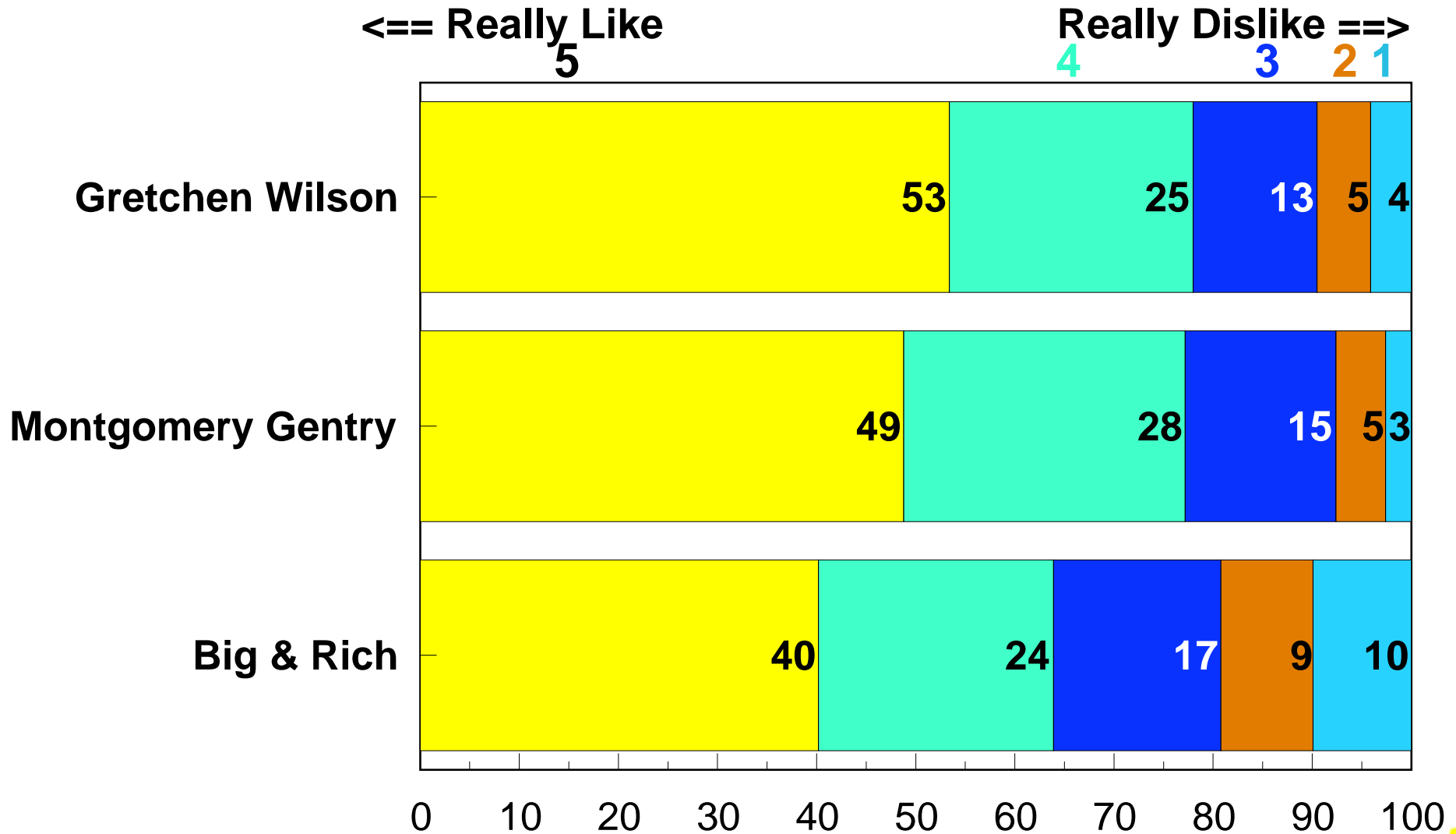
# How often would you like to hear on your favorite station for Country music....



# How much do you like or dislike...



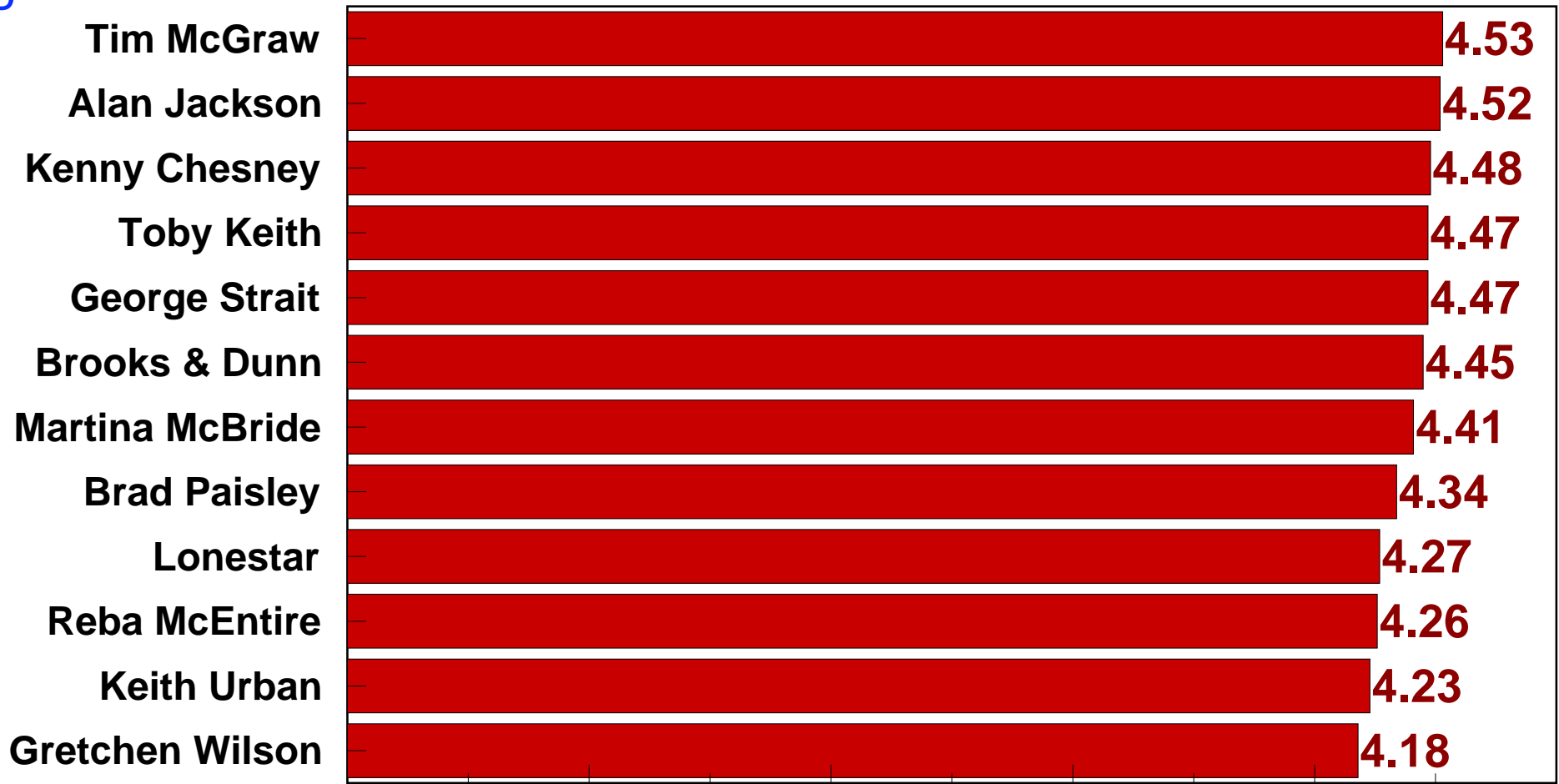
# How much do you like or dislike...



# Artist Scores: (Mean Scores)

Page 1

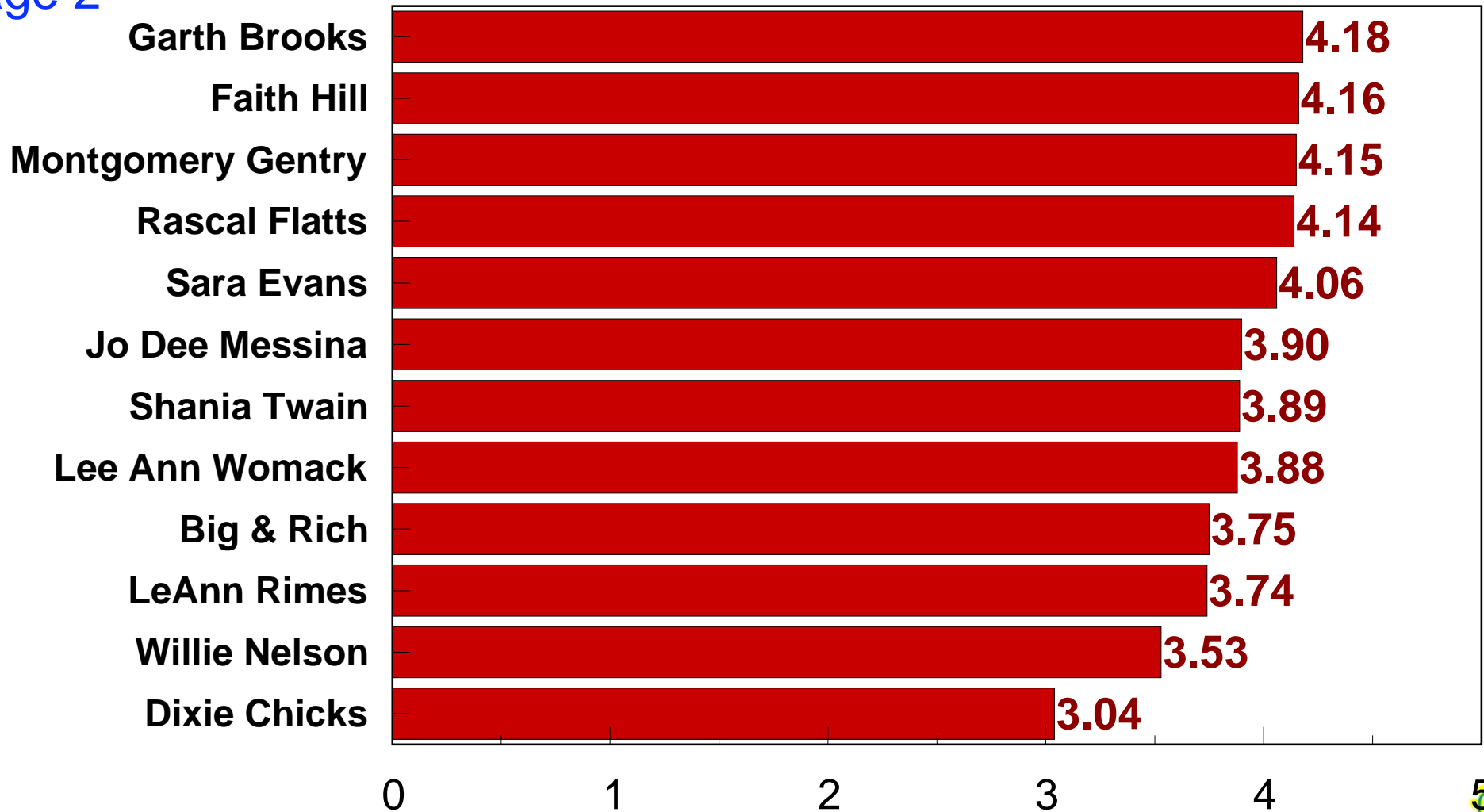
Average on a 1-5 scale where a 1 means Really Dislike and a 5 means Really Like



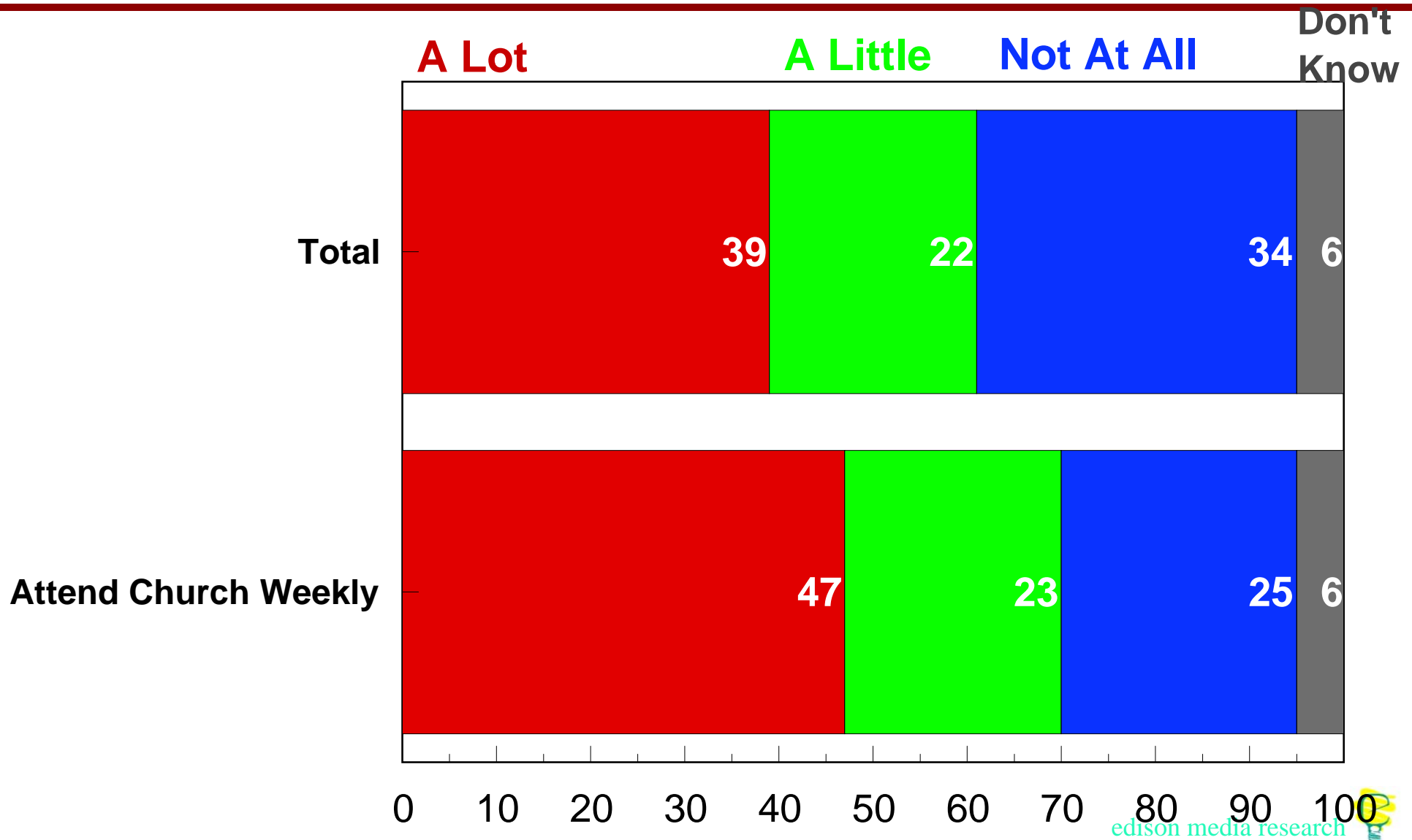
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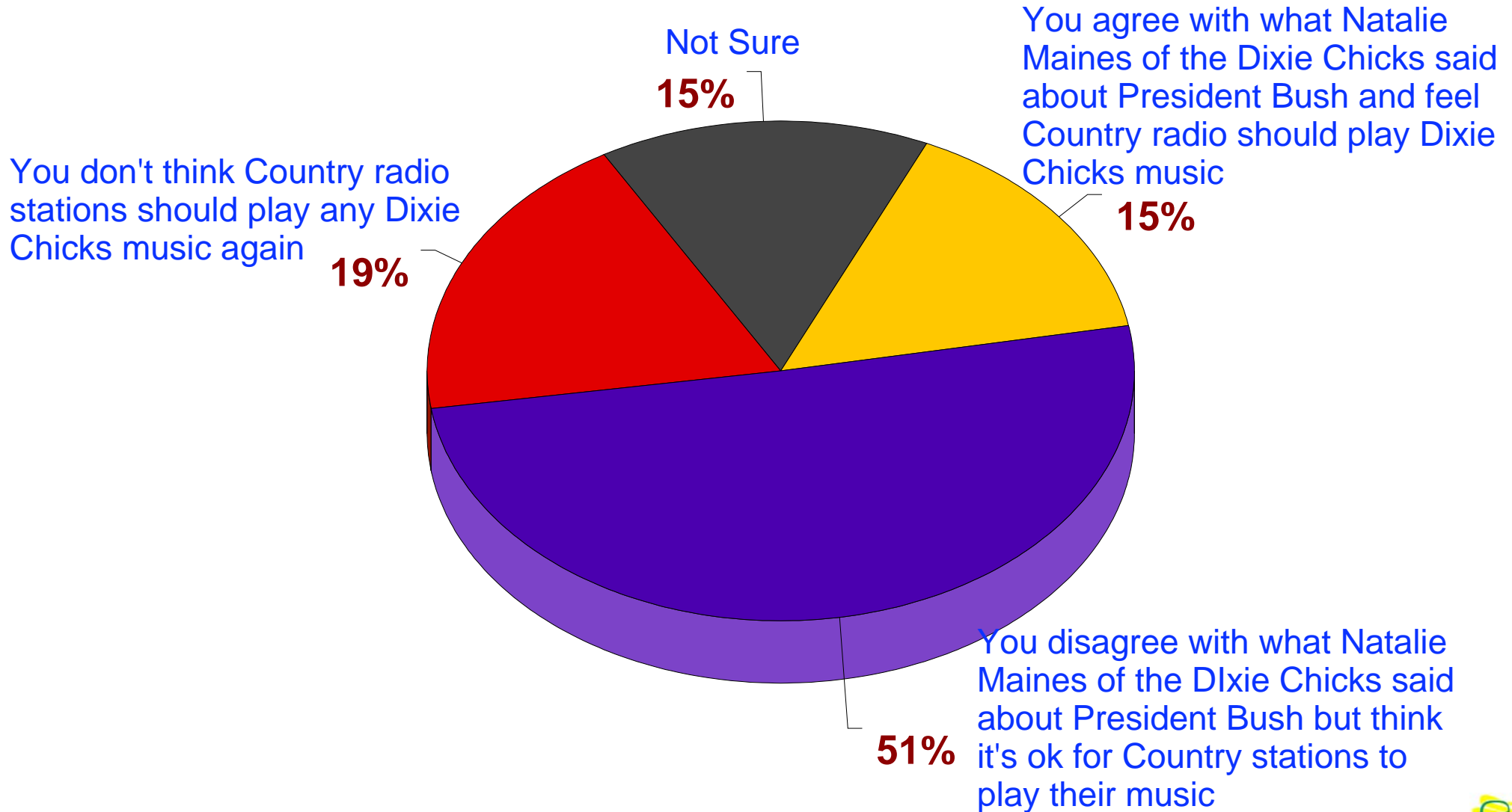
Page 2



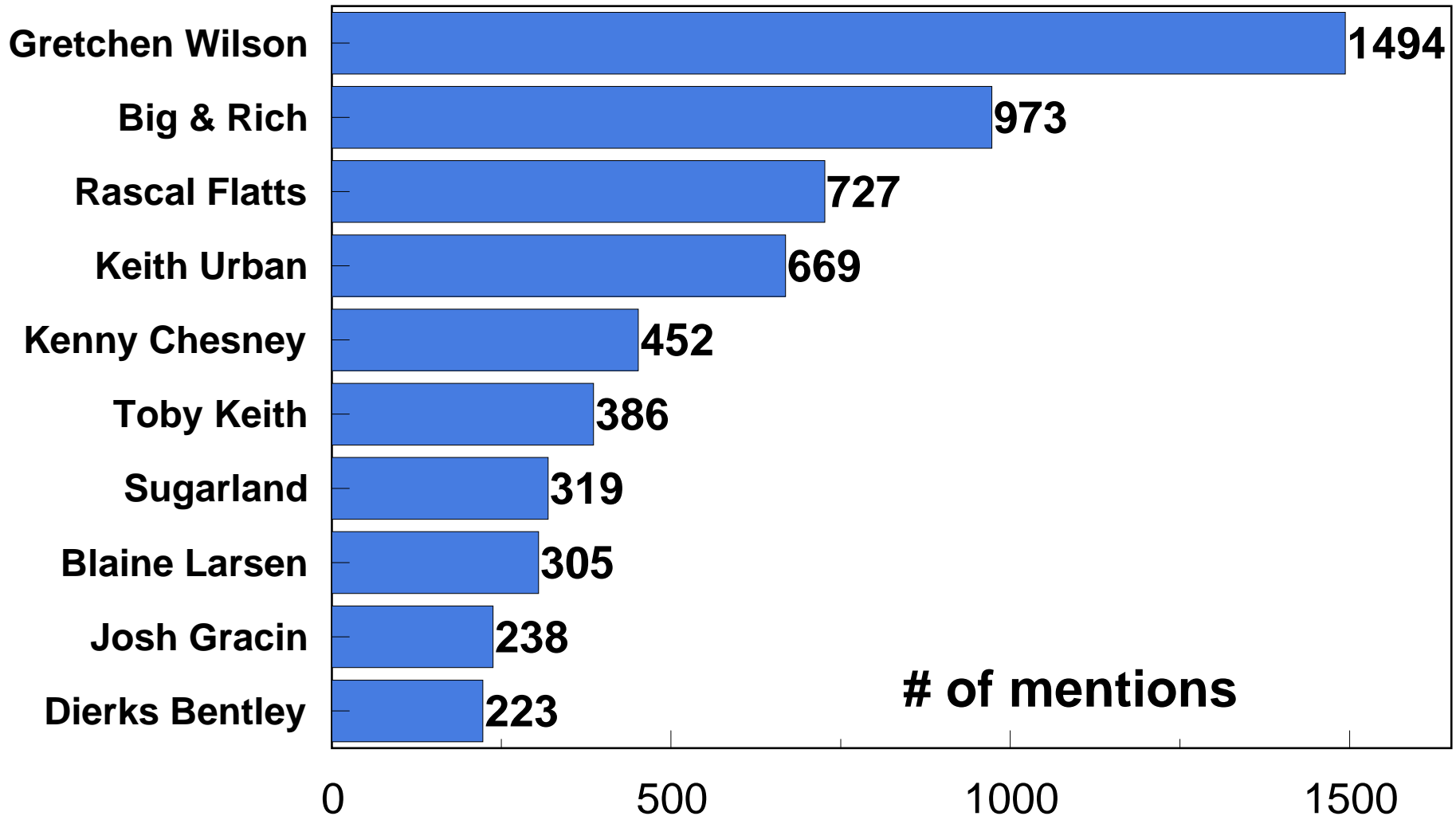
# How upset were you with the Dixie Chicks when lead singer Natalie Maines made comments about President Bush in 2003?



# Which of the following statements best represents your point of view of the Dixie Chicks?



# Which Country artists whom you really like did you first learn about in the last year or two?



# Summary

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- Country--and Country Radio--are improving and have significant momentum
- These P1s not nearly as reactionary about socio-political issues as many might suggest
- Spotloads are still perceived to be high despite many stations' claims

# Summary

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- Country P1s adopt new technologies--but do not use them to replace radio
- While Country's new artists polarize some--they clearly energize the format
- Core Country artists--not AC Crossover artists--drive P1 passion

# edison media research

