

# Winning the Country Music Campaign...

*Country Radio Broadcasters - March 1, 2002*

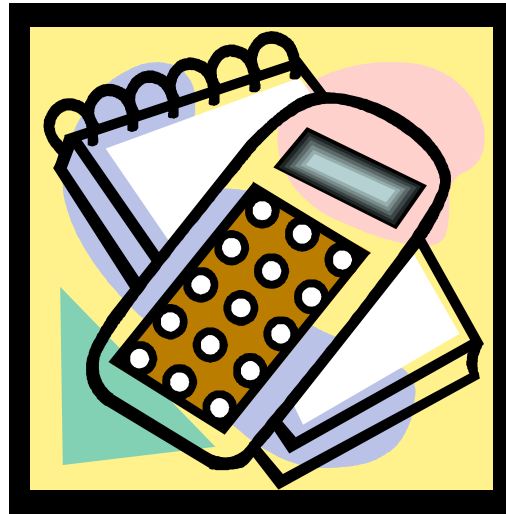


COOPER AND SECREST ASSOCIATES, *Inc.*

**Linda A. DiVall, President**  
*American Viewpoint, Inc.*

**Alan Secrest, President**  
*Cooper & Secrest Associates, Inc.*

# I. Methodology



## Sampling Methodology

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- American Viewpoint, Inc. and Cooper & Secrest Associates, Inc. surveyed 1,009 respondents nationwide
  - February 2 through 4, 2002.
  - Margin of error  $\pm 3.2\%$  at 95% confidence.
- In order to gather a population of all **current and prospective country radio listeners**, respondents were asked a series of screening questions:
  - Non-radio listeners were screened out,
  - Respondents who **both** never bought country albums **and** never listened to country radio screened out.

# Glossary of Terms Used

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## **36% - Strong Country Listeners (“CORE LISTENERS”)**

“Always” or “Most of the Time” listen to country radio.

## **29% - Weak Country Listeners (“BATTLEGROUND”)**

“Sometimes” listen to country radio.

## **35% - Country Rejecters (“CORE NON-LISTENERS”)**

“Rarely” or “Never” listen to country radio.

## **33% - Country P1s**

Of all genres presented, Country P1s listen to “country music” most.

## **28% - Country Music Radio Gainers**

Listen to Country Music Radio “more often” now than 5 years ago.

## **19% - Country Music Radio Drifters**

Listen to Country Music Radio “less often” now than 5 years ago **&** 5 years ago listened to Country Radio at least “always/most/sometimes.”

## **31% - Country Music Gainers**

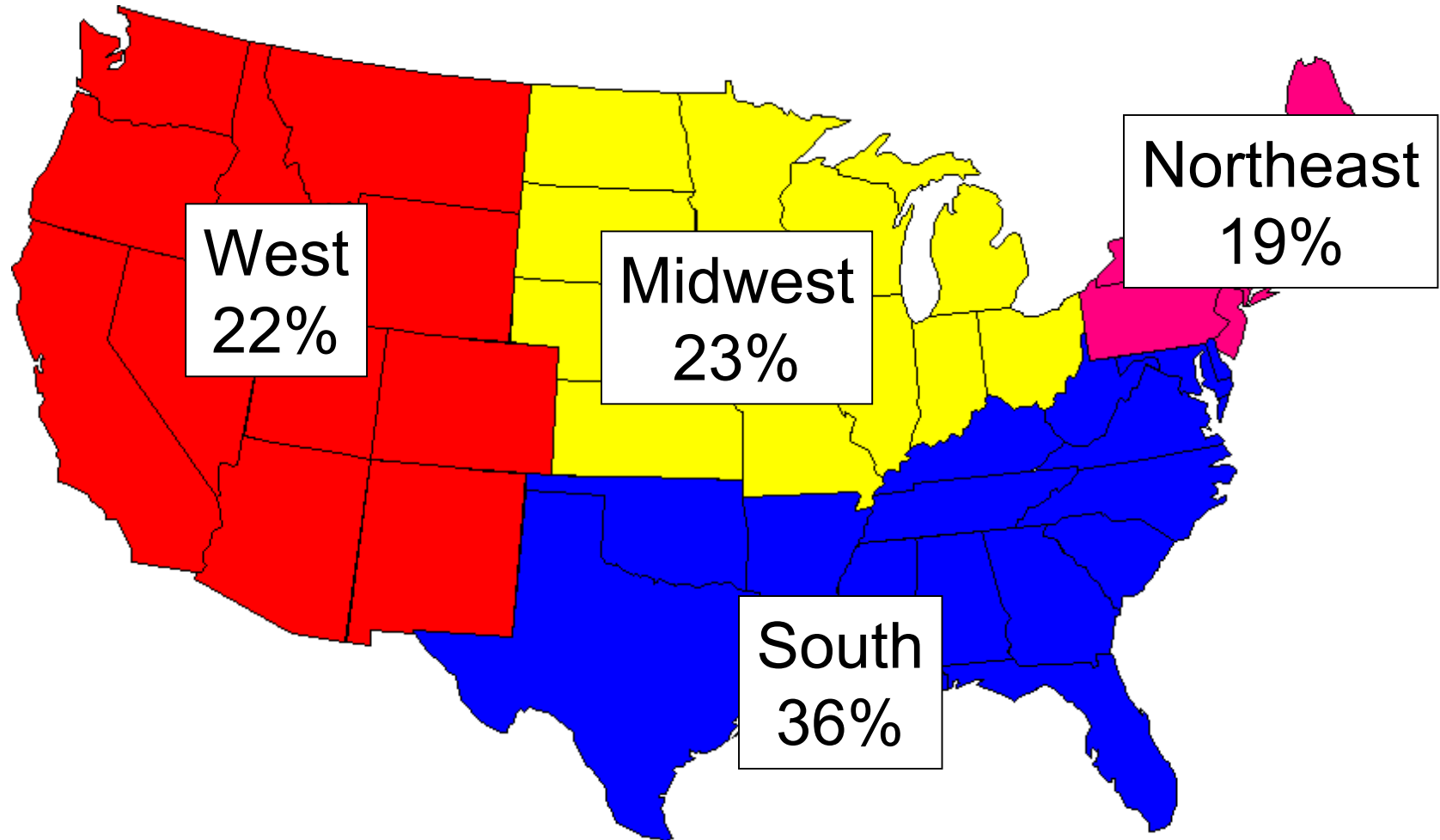
Listen to Country Music (aside from radio; includes CDs/Online/Mp3/TV) “more often” than 5 years ago

## **21% - Country Music Drifters**

Listen to Country Music (aside from radio; includes CDs/Online/Mp3/TV) “less often” now than 5 years ago.

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# Regional Breakdown



# Profile of Country Radio Listeners

- Disproportionately women and over the age of 65.
- 56% of core listeners are 50+, while only 43% are less than 50.
- Strong listenership in South and Midwest.
- Partisanship is consistent through all three designations.
- Core listeners are CMA viewers
- Respondents with "O Brother Where Art Thou" exposure are stronger than average country radio listeners.

	TOTAL SAMPLE	Strong Country Listeners (Core Listeners)	Weak Country Listeners (Battleground)	Country Rejecters (Core Non-Listeners)
ALL RESPONDENTS	100%	36%	29%	35%
Northeast	19%	14%	19%	25%
South	36%	41%	36%	30%
Midwest	23%	26%	23%	20%
West	22%	20%	21%	25%
Men	50%	44%	54%	51%
Women	50%	56%	46%	49%
Age 18-34	25%	20%	24%	29%
Age 35-49	26%	23%	26%	27%
Age 50-64	28%	29%	29%	26%
Age 65+	21%	27%	20%	18%
Democrats	35%	34%	35%	36%
Independents	25%	26%	26%	23%
Republicans	38%	37%	39%	39%
Liberal	27%	23%	28%	27%
Moderate	28%	33%	24%	28%
Conservative	41%	36%	44%	41%
Musicians	28%	23%	32%	32%
Mp3 Users	19%	12%	20%	26%
"O Brother" Exposure	36%	40%	34%	32%
CMA Award Show Viewers	37%	53%	40%	17%

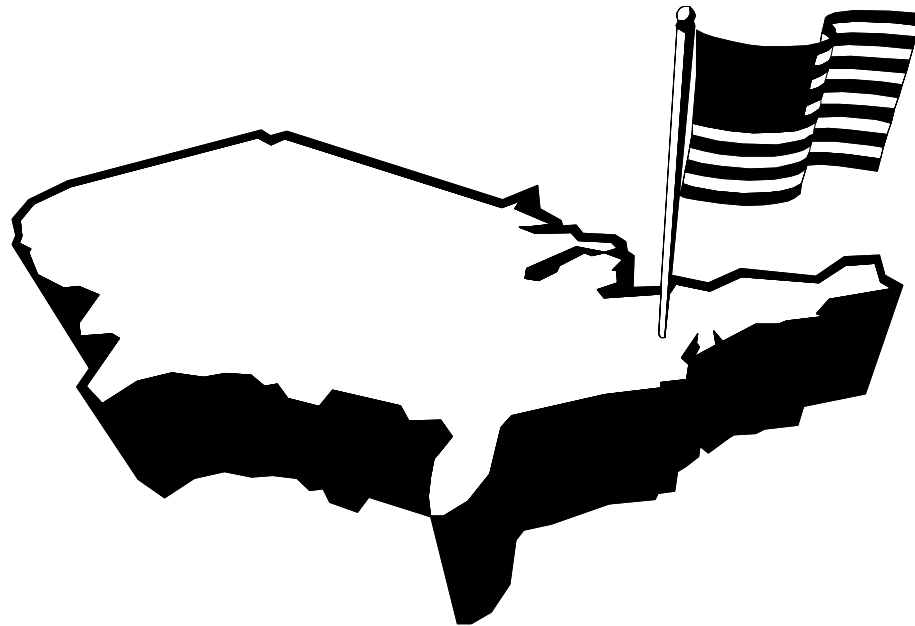
# Profile of Purchasers

- 56% of strong country purchasers are 35-64 years of age.
- 59% are women.
- CMA viewership among strong country purchasers tops 50%.

	TOTAL SAMPLE	Strong Country Purchasers	Weak Country Purchasers	Country Resisters
ALL RESPONDENTS	100%	23%	27%	50%
Northeast	19%	19%	16%	21%
South	36%	37%	39%	34%
Midwest	23%	21%	25%	23%
West	22%	11%	20%	23%
Men	50%	41%	49%	54%
Women	50%	59%	51%	46%
Working Women	30%	40%	27%	26%
Age 18-34	25%	22%	14%	27%
Age 35-49	26%	26%	28%	24%
Age 50-64	28%	30%	29%	27%
Age 65+	21%	20%	22%	21%
Men <50	26%	20%	29%	28%
Men >50	23%	22%	20%	25%
Women <50	23%	30%	21%	22%
Women >50	26%	29%	29%	24%
Democrats	35%	39%	31%	35%
Republicans	38%	35%	37%	39%
Mp3 Users	19%	14%	20%	21%
"O Brother" Exposure	36%	47%	34%	31%
CMA Award Show Viewers	37%	52%	42%	27%

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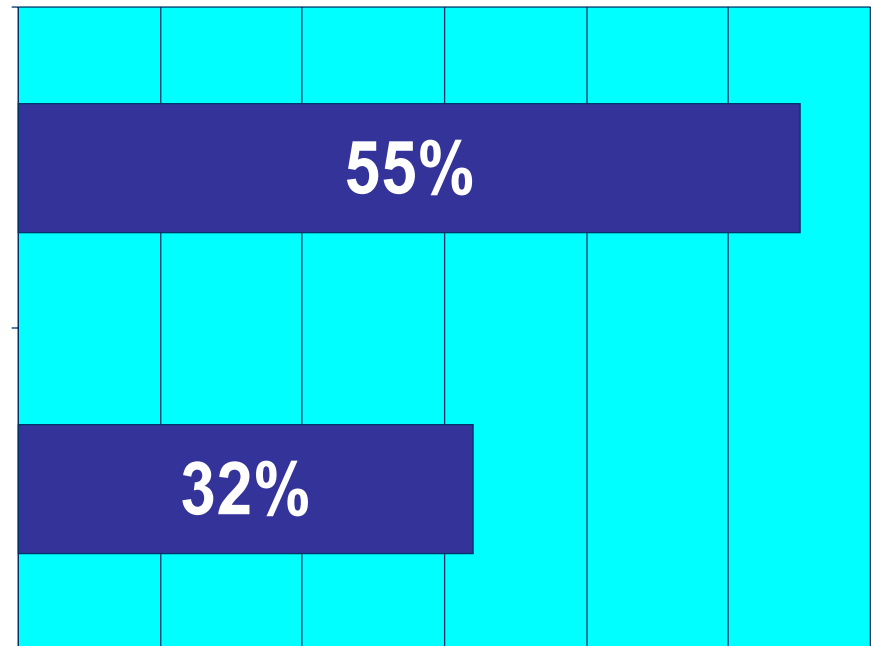
## II. Country Landscape



# Public remains optimistic about mood, in spite of lingering economic doubt.

“...Do you feel that things in this country are generally headed in the right direction...”

“...or do you feel things are generally off on the wrong track?”



- GOP optimism is driving the “right direction” trend, with 65% of Republicans saying the country is headed in the “right direction” compared to 52% of Independents and 47% of Democrats.
- Core Listeners are the least optimistic (53%) while Core Non-Listeners are the most optimistic (58%)
- Majority “right direction” tends to reward status quo, and push down desire for change.

# Personal and Community Values



- Religion and family remain key values across all segmented groups.
- Note strength of religion among 50+ group and with Core Listeners.
- Financial Success is nearly twice as important with 18-49 year olds as it is with those 50+.
- Personal Freedom stressed with 18-49 group and with Battlegrounders, while patriotism is much higher among 50+.

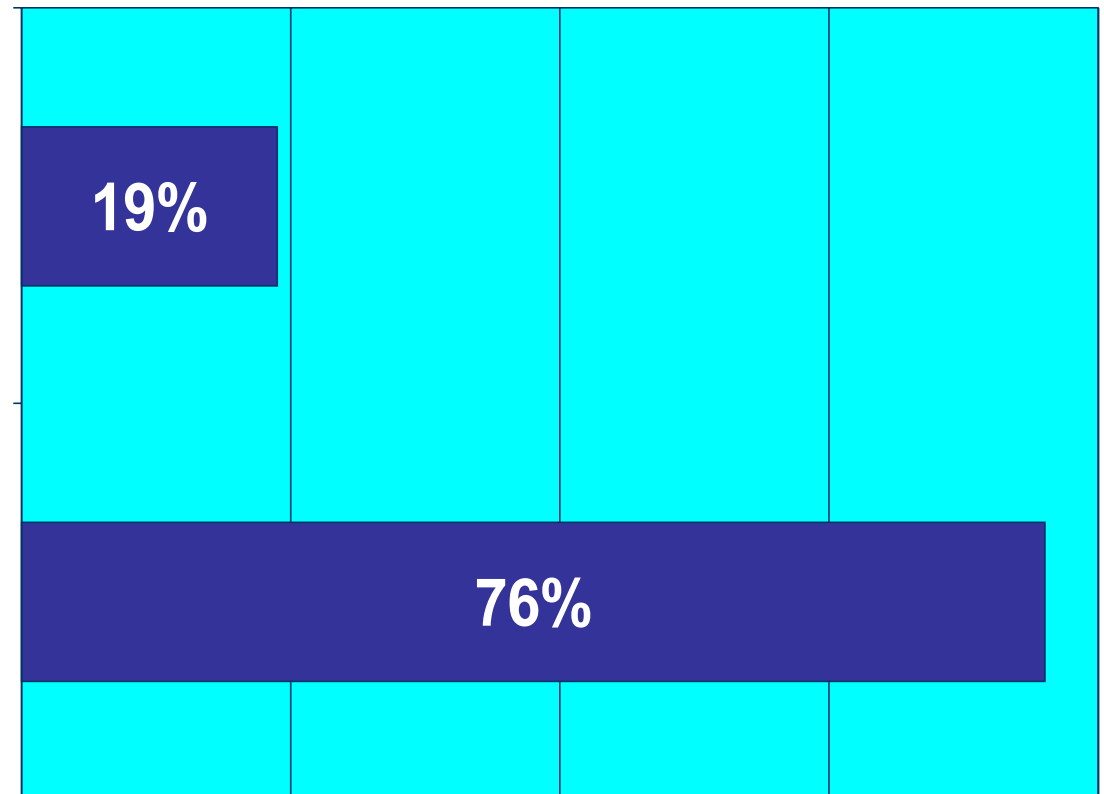
"American Values"	TOTAL	18-49	50+	Core Listeners	Battle-ground	Core Non-Listeners
Religion	44%	37%	<b>49%</b>	47%	40%	43%
Family	40%	43%	38%	41%	39%	39%
Compassion	32%	33%	32%	31%	33%	32%
Personal Freedom	31%	<b>34%</b>	28%	27%	33%	30%
Patriotism	25%	21%	<b>30%</b>	28%	25%	26%
Financial Success	14%	<b>18%</b>	10%	12%	14%	16%

# Public embraces post September 11 patriotic tone and wants it continued.

**“...Since the 9/11 terrorist attacks, some radio stations have been playing more patriotic music or conducting more patriotic-themed promotions than usual...”**

“...It is time to cut back on these promotions. While they were nice for a while, now they have worn out their welcome a bit and should be reduced and eliminated.”

*“...The music and these promotions have played a healing role and should be continued at the same level for the foreseeable future.”*



# III. Attributes & Personalities



## Feeling Thermometer *(net positive)*

	Positive	Negative	Net Positive
George W. Bush	75%	11%	+64%
<b>Country Music</b>	<b>68%</b>	<b>9%</b>	<b>+59%</b>
<b>Country Music Radio Stations</b>	<b>64%</b>	<b>11%</b>	<b>+53%</b>
<b>Today's Country Singers</b>	<b>63%</b>	<b>12%</b>	<b>+51%</b>
Republican Party	51%	22%	+29%
Jazz Music	46%	21%	+25%
Democratic Party	43%	26%	+17%
Al Gore	34%	35%	-1%
Pop Music	32%	34%	-2%
Rock Music	32%	41%	-9%
Rap and Hip-Hop Music	9%	78%	-69%

- Country music as an incumbent brand has robust numbers at 68% favorable to 9% unfavorable, with 37% very positive.
- Country music leads its nearest “rival” genre by 22%.
- Radio drifters offer significantly higher ratings for country music (66%) than for country music radio (55%) or singers (53%).

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# Feeling Thermometer *(net positive)*

(note: asked of high frequency country radio listeners only)

	Positive	Negative	Net Positive
George Strait	90%	1%	+89%
Alan Jackson	88%	2%	+86%
Tim McGraw	86%	3%	+83%
Faith Hill	84%	7%	+77%
Reba McEntire	82%	7%	+75%
Toby Keith	81%	6%	+75%
Kenny Chesney	78%	9%	+69%
Garth Brooks	78%	11%	+67%
Shania Twain	70%	14%	+56%
Dixie Chicks	67%	16%	+51%

- Note strong presence of female performers in the “Hot 6.”
- Hot 6 also score well with Battlegrounders and the 18-49 year old audience.
- Shania Twain is at +66% positive, and the Dixie Chicks at +67% with 18-49 year olds

## Feeling Thermometer *(Positive to Negative ratio)*

	Country Music		Country Radio		Country Singers	
<b>TOTAL</b>	<b>68%</b>	<b>9%</b>	<b>64%</b>	<b>11%</b>	<b>63%</b>	<b>12%</b>
Radio Gainers	84%	1%	83%	3%	81%	6%
Radio Drifters	<b>66%</b>	13%	<b>55%</b>	16%	<b>53%</b>	18%
Core Listeners	93%	1%	89%	2%	82%	6%
Battleground	71%	4%	67%	8%	65%	10%
Core Non-Listeners	39%	21%	31%	26%	42%	19%
18-49	65%	10%	61%	11%	<b>66%</b>	<b>9%</b>
50+	<b>71%</b>	9%	67%	11%	61%	15%
P1s	<b>94%</b>	0%	<b>89%</b>	<b>4%</b>	82%	6%

- 18-49 year old audience gives its highest ratings to country music, suggesting vast potential for enhancing listenership.
- However, Country music does score better with 50+ than 18-49 group.
- Radio drifters show significantly higher ratings with Country Music than with country radio or singers.

# Country Attributes

- Positive attributes far outweigh any negative mentions.
- If Country Radio were a political candidate, it has strong underpinnings to maintain its core while expanding its audience appeal.
- Respondents reject the idea that country is “too sad” or “too corny.”
- In certain campaigns, attributes are more telling than the ballot test. Attribute ratings like these paint a good picture for the state of country music.

	Net	18-49
Tells A Story	+89%	+87%
Good Contribution to American Life	+63%	+66%
Fun to Listen To	+57%	+57%
Has Something Interesting to Say	+55%	+55%
Easy To Relate To	+54%	+55%
Fun to Dance To	+38%	+41%
Reflects Your Values	+31%	+39%
Makes You Proud	+25%	+30%
Too Sad	-5%	-2%
Too Corny	-24%	-26%

## Words and Phrases Describing Country Music Radio / Country Music

"COUNTRY MUSIC RADIO"				"COUNTRY MUSIC"		
Core Listeners	Battle-ground	TOTAL	<i>Describes...</i>	TOTAL	Core Listeners	Battle-ground
37%	25%	26%	Station Praise	-	-	-
15%	17%	20%	Station Criticism	-	-	-
19%	11%	13%	Comfortable Style	18%	26%	14%
13%	12%	12%	Upbeat & Fun	28%	32%	16%
1%	5%	10%	Non-Participants	-	-	-
2%	7%	9%	General Criticism	30%	9%	24%
4%	8%	9%	Music Criticism	-	-	-
12%	9%	8%	General Positive	8%	10%	8%
9%	11%	8%	Affirms Values	7%	10%	5%
7%	5%	6%	Sincere / Keeping it Real	<b>34%</b>	<b>40%</b>	<b>28%</b>
4%	4%	5%	Neutral	-	-	-
-	-	-	Other	6%	3%	6%
-	-	-	Affirms Tradition	3%	2%	3%

# Most Appealing Thing About Country Radio / Music

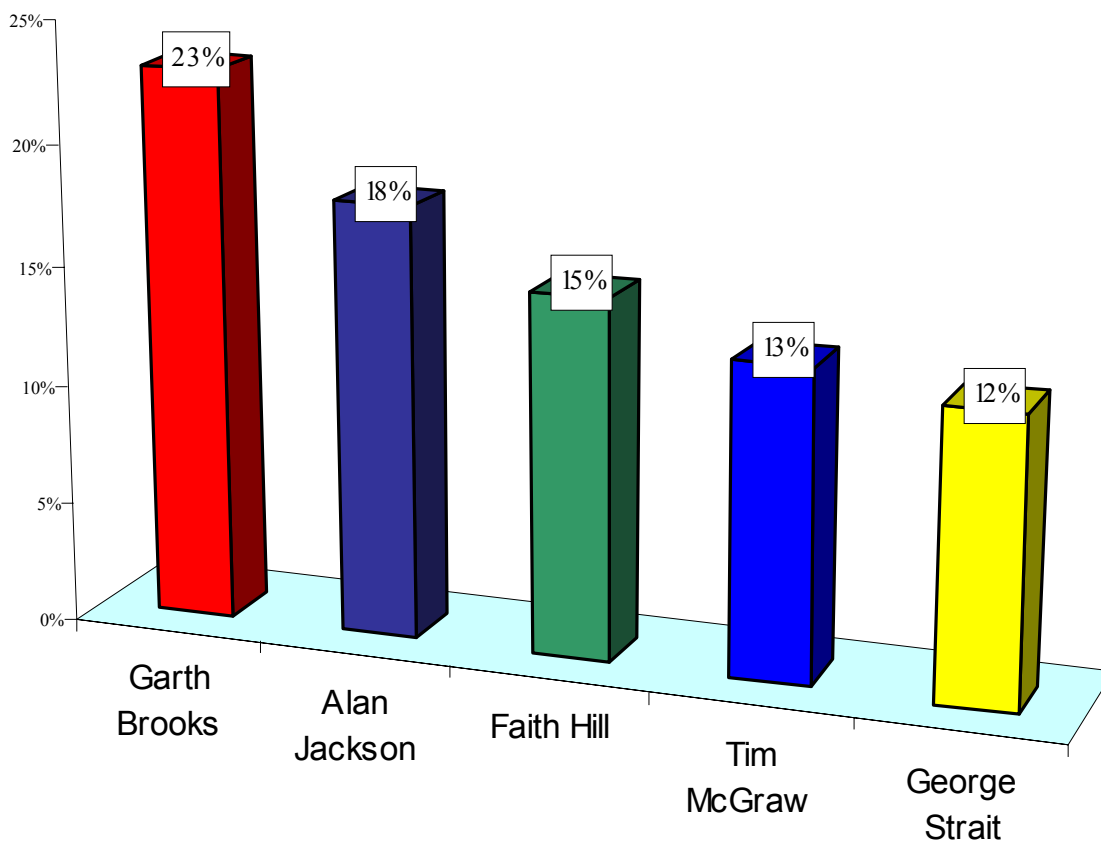
<b>"COUNTRY MUSIC RADIO"</b>				<b>"COUNTRY MUSIC"</b>		
<b>Core Listeners</b>	<b>Battle-ground</b>	<b>TOTAL</b>	<b><i>Most Appealing Thing</i></b>	<b>TOTAL</b>	<b>Core Listeners</b>	<b>Battle-ground</b>
31%	33%	29%	<b>Sincere / Keeping It Real</b>	45%	53%	41%
27%	22%	22%	<b>General Positive</b>	8%	9%	5%
20%	14%	14%	<b>Comfortable Style</b>	14%	20%	14%
9%	10%	11%	<b>Upbeat and Fun</b>	13%	6%	17%
10%	9%	9%	<b>Station Praise</b>	-	-	-
8%	11%	8%	<b>Affirms Values</b>	4%	4%	2%
3%	3%	5%	<b>Performer Praise</b>	13%	12%	9%
5%	1%	3%	<b>Affirms Tradition</b>	-	-	-
-	-	-	<b>Sonic Praise</b>	11%	8%	16%

# Least Appealing Thing About Country Radio / Music

"COUNTRY MUSIC RADIO"			"COUNTRY MUSIC"			
Core Listeners	Battle-ground	TOTAL	Least Appealing Thing	TOTAL	Core Listeners	Battle-ground
40%	32%	33%	Station Criticism	-	-	-
13%	15%	13%	Dissat. w/Current Country	-	-	-
6%	13%	12%	Negative/Sad Content	29%	29%	27%
-	-	-	Sonic Criticism	24%	14%	24%
5%	10%	12%	Style Criticism	16%	9%	16%
2%	5%	7%	General Criticism	4%	5%	4%

## Favorite Three New Country Artists In The Past Year or So - *Open End*

- Obvious problem is that among **top five** named, none is a new artist.
- 35% of respondents were able to offer up a new talent when asked.
- Challenge to the industry is to provide a look at emerging stars and find a way to better showcase new talent.



Toby Keith	8%
Kenny Chesney	5%
Brad Paisley	5%
Jo Dee Messina	3%
Sara Evans	2%
Lee Ann Womack	2%
Montgomery Gentry	2%
Jessica Andrews	2%
Jamie O'Neal	2%
Lonestar	1%
Blake Shelton	1%
keith urban	1%
Trace Adkins	1%

# IV. Listening Preferences



# Most Listened to Music

	TOTAL	Men <50	Men >50	Women <50	Women >50	Battleground <50	Battleground >50
Country	33%	23%	38%	32%	38%	7%	16%
Oldies	16%	6%	25%	8%	26%	11%	40%
Classic Rock	11%	21%	9%	8%	5%	21%	13%
Alternative Rock	6%	12%	2%	9%	0%	11%	1%
Cont. Christian	4%	6%	2%	5%	4%	6%	4%
Classical	6%	2%	9%	4%	9%	3%	8%
Gospel	3%	3%	2%	2%	7%	3%	6%
Jazz	4%	5%	6%	2%	3%	6%	4%
R & B	3%	4%	0%	6%	1%	6%	0%
Top 40	4%	5%	1%	13%	0%	11%	1%
Soft Rock	5%	3%	3%	6%	5%	5%	4%
Rap / Hip Hop	3%	7%	0%	4%	2%	6%	0%

- Country leads among all respondents, though tied with classic rock among men below the age of 50.
- Key target group to maximize listening is men less than 50 years old, as classic rock and alternative rock are “detractors from vote performance” of country music.
- Country is the preferred music genre of most female subgroups, with females 65+ choosing oldies +1% over country music.

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## Most Listened to Type of Music – Regional (total sample)

•Other types of music lag far behind country music in all other regions besides the Northeast – not a country music stronghold.

•Outside of Northeast, country is 2 times as popular as any other competing genre.

	TOTAL	NE	South	Mid West	West
Country	33%	24%	35%	35%	32%
Oldies	16%	20%	15%	15%	18%
Classic Rock	11%	11%	7%	16%	12%
Alternative Rock	6%	10%	4%	4%	6%
Cont. Christian	4%	3%	5%	8%	3%
Classical	6%	6%	6%	5%	6%
Gospel	3%	2%	6%	1%	1%
Jazz	4%	4%	4%	3%	6%
R & B	3%	4%	3%	3%	0%
Top 40	4%	6%	5%	4%	3%
Soft Rock	5%	5%	4%	3%	7%
Rap / Hip Hop	3%	4%	3%	2%	1%

## Most Listened to Type of Music – Regional (18-49 years old)

•Oldies has been relegated to 5<sup>th</sup> place among younger listeners, while 2<sup>nd</sup> overall with the total population.

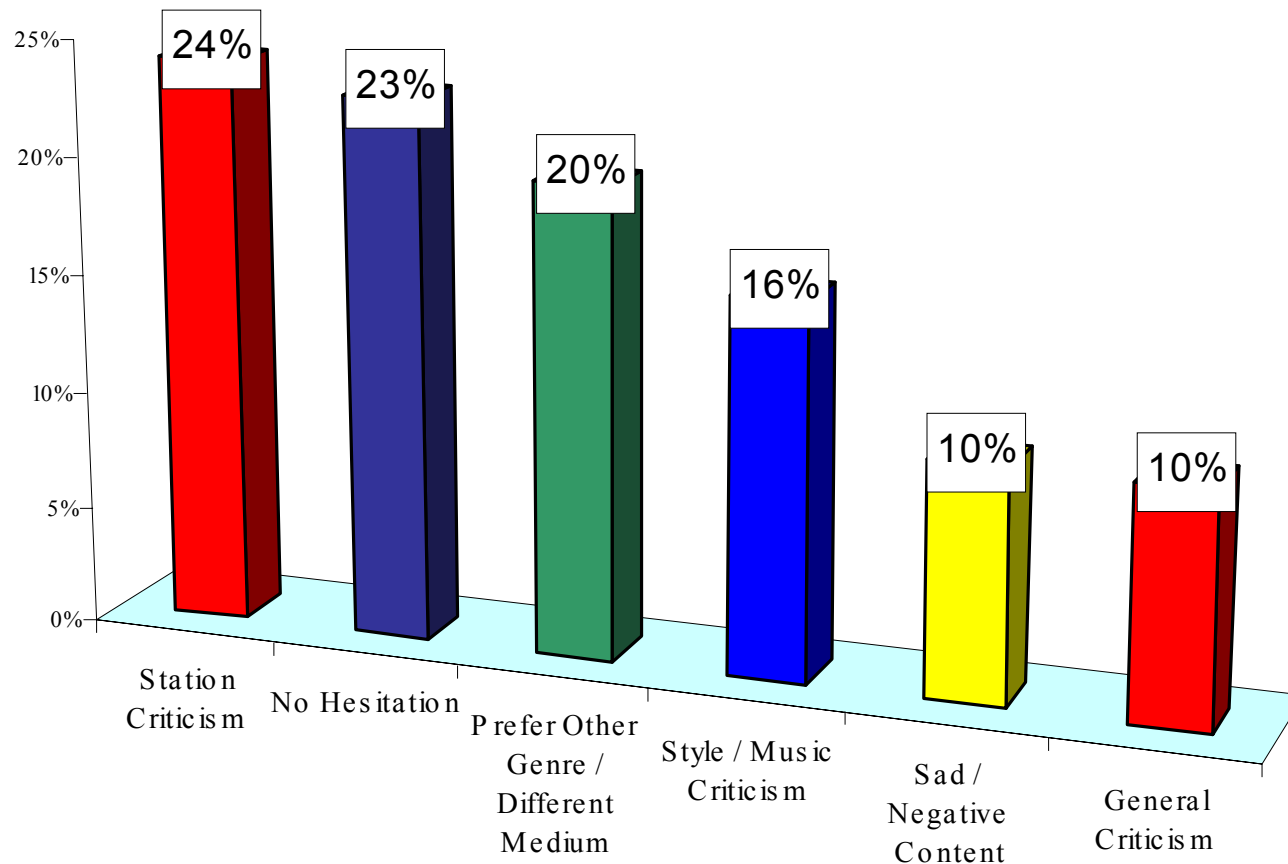
•Even in the Northeast, country still ties alternative rock among younger listeners for most listened to genre.

•However, in the South, country is favored by a three to one margin to classic rock, its nearest rival genre.

•In the West, country is favored twice as much as both classic rock and alternative rock.

TOTAL ALL AGES		TOTAL 18-49	NE	South	Mid West	West
33%	Country	27%	18%	34%	23%	28%
11%	Classic Rock	15%	13%	9%	25%	15%
6%	Alternative Rock	11%	17%	7%	8%	14%
4%	Top 40	8%	10%	9%	7%	6%
16%	Oldies	7%	8%	6%	9%	7%
3%	Rap / Hip Hop	6%	6%	7%	2%	4%
4%	Cont. Christian	5%	3%	8%	7%	4%
3%	R & B	5%	7%	7%	4%	1%
5%	Soft Rock	5%	7%	4%	5%	6%
4%	Jazz	4%	3%	3%	4%	5%
6%	Classical	3%	5%	1%	2%	4%
3%	Gospel	2%	1%	4%	1%	1%

# Biggest Hesitation About Listening To Country Radio



- Station criticism is biggest hesitation with comments like “DJs talk too much” and “too many commercials.”

- 26% of 18-49s have station criticism, 21% with Battlegrounders, and 29% with core listeners.

- 13% of those younger than 50 years identify “too sad” versus only 7% of those older than 50 years.

- 16% have “style / music criticisms,” meaning they find the music too twangy, or they don’t like the beat.

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# Profile of P1s

- 33% of this sample are termed P1 – the identify country music as the type of music they listen to most.
- P1s skew older.
- P1 partisanship is balanced: P1s lean conservative but are less conservative and more moderate than on average.
- Those with exposure to the “O Brother Where Art Thou” soundtrack are also more likely to fit the P1 designation.

	TOTAL SAMPLE	P1
All Listeners	100%	33%
Northeast	19%	15%
South	36%	39%
Midw est	23%	25%
West	22%	22%
Men	50%	45%
Women	50%	55%
Age 18-34	25%	17%
Age 35-49	26%	23%
Age 50-64	28%	32%
Age 65+	21%	27%
Democrats	35%	34%
Independents	25%	26%
Republicans	38%	38%
Liberal	27%	23%
Moderate	28%	33%
Conservative	41%	38%
Men <50	26%	19%
Men >50	23%	27%
Women <50	23%	23%
Women >50	26%	32%
Musicians	28%	21%
Mp3 Users	19%	12%
"O Brother" Exposure	36%	42%

# Profile of Country Radio Gainers & Drifters

- No gender differences in drifting vs. gaining.
- Among gainers, 48% report they watched the CMA Award Show - suggesting these respondents like what they see and want to hear more.
- Among gainers, 38% of respondents have "O Brother..." exposure.

	TOTAL SAMPLE	Gainers	Drifters
All Listeners	100%	28%	19%
Northeast	19%	22%	14%
South	36%	39%	37%
Midwest	23%	20%	24%
West	22%	19%	25%
Men	50%	47%	48%
Women	50%	53%	52%
Age 18-34	25%	<b>32%</b>	22%
Age 35-49	26%	28%	24%
Age 50-64	28%	23%	<b>30%</b>
Age 65+	21%	16%	22%
Men 18-34	13%	<b>16%</b>	11%
Women 18-34	12%	16%	<b>11%</b>
Men 35-49	14%	<b>15%</b>	11%
Women 35-49	12%	13%	13%
Musicians	28%	30%	28%
Mp3 Users	19%	<b>21%</b>	19%
"O Brother" Exposure	36%	<b>38%</b>	34%
CMA Award Show Viewers	37%	<b>48%</b>	30%

## Volunteered Reasons For Drifting (19% of total sample)

	TOTAL	Battle-ground	Men 18-49	Women 18-49
<b><i>ALL Respondents</i></b>	<b>100%</b>	<b>29%</b>	<b>26%</b>	<b>23%</b>
Prefer Different Style	37%	36%	24%	29%
Defect / Dropped Radio	32%	30%	<b>10%</b>	<b>11%</b>
Tastes Changed	22%	23%	<b>30%</b>	<b>28%</b>
Format Criticism	10%	10%	12%	18%
Access Limited	6%	2%	6%	4%
Other	6%	6%	8%	9%

# Profile of Country Music Gainers & Drifters

- Among gainers, 26% are Mp3 users – suggesting that younger listeners are listening to Country music - just not on the radio
- Among gainers, CMA Viewing, and O Brother exposure is significantly higher.
- No regional difference in drifting vs. gaining.

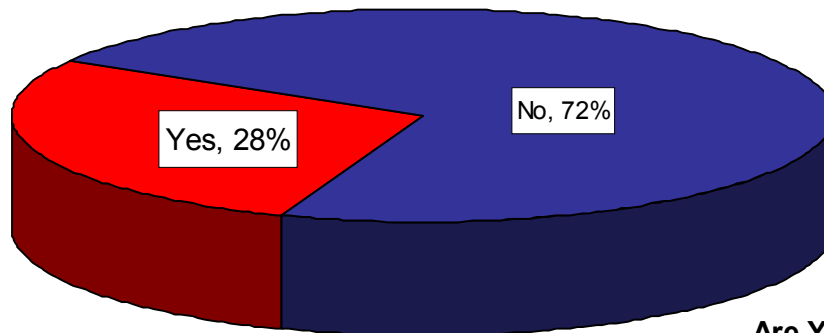
	TOTAL SAMPLE	Gainers	Drifters
All Listeners	100%	31%	21%
Northeast	19%	18%	15%
South	36%	39%	35%
Midwest	23%	22%	27%
West	22%	21%	23%
Men	50%	46%	49%
Women	50%	54%	51%
Age 18-34	25%	<b>32%</b>	21%
Age 35-49	26%	30%	19%
Age 50-64	28%	24%	<b>33%</b>
Age 65+	21%	14%	<b>27%</b>
Men <50	26%	<b>31%</b>	22%
Men >50	23%	15%	<b>28%</b>
Women <50	23%	<b>31%</b>	21%
Women >50	26%	23%	29%
Democrats	35%	35%	34%
Independents	25%	24%	22%
Republicans	38%	38%	<b>43%</b>
Musicians	28%	31%	24%
Mp3 Users	19%	<b>26%</b>	13%
"O Brother" Exposure	36%	<b>42%</b>	31%
CMA Award Show Viewers	37%	<b>48%</b>	30%

# V. What's Up?

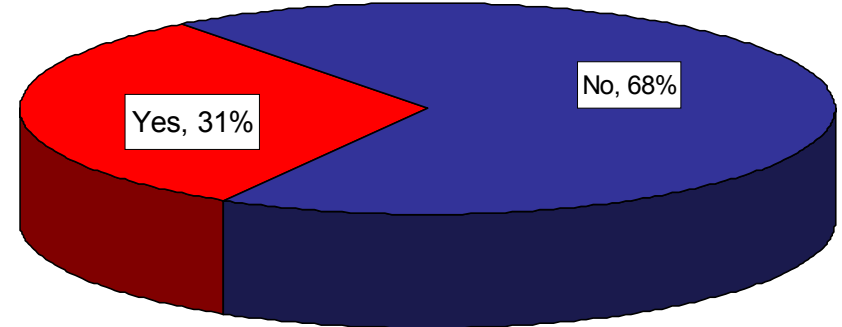


# “O Brother, Where Art Thou?” Exposure

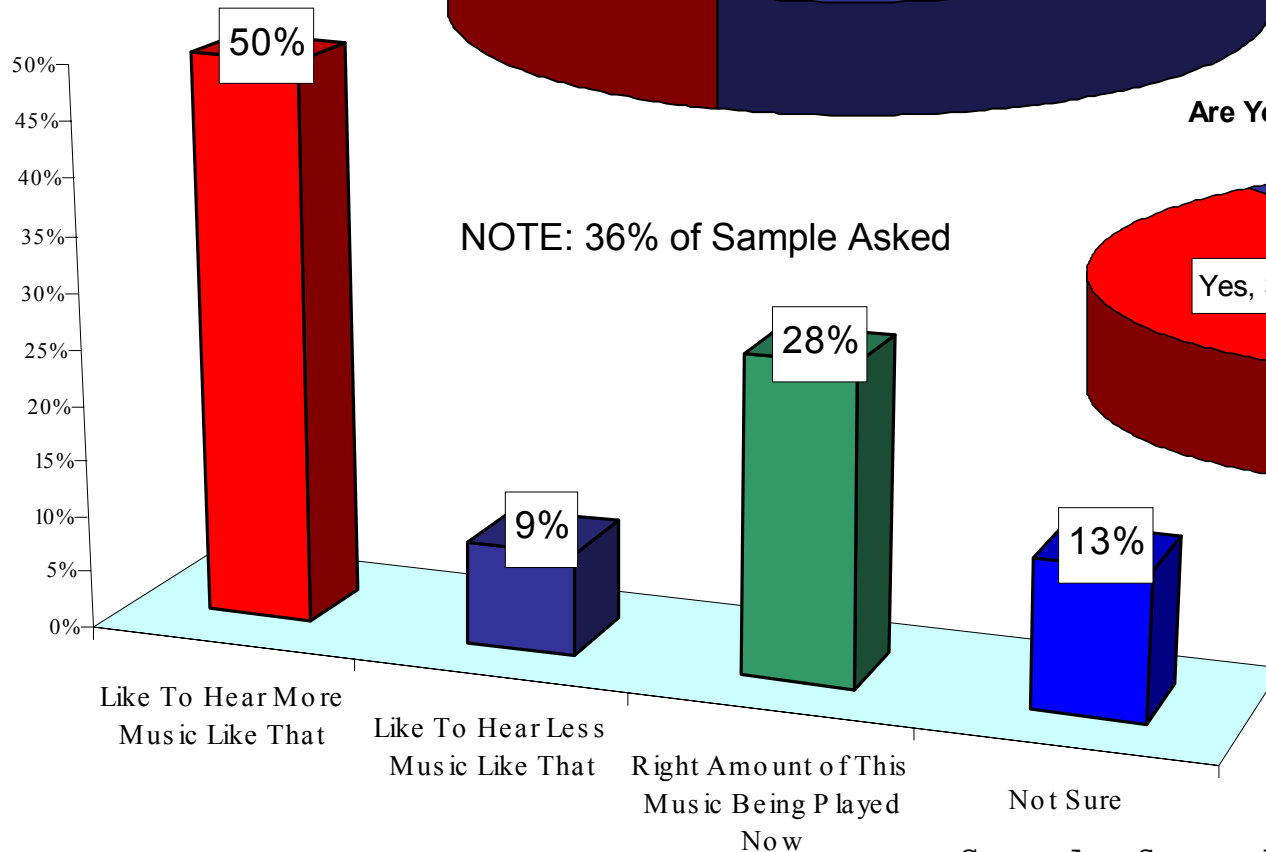
Have You Seen The Movie?



Are You Familiar With The Music, or Do You Own The Soundtrack?



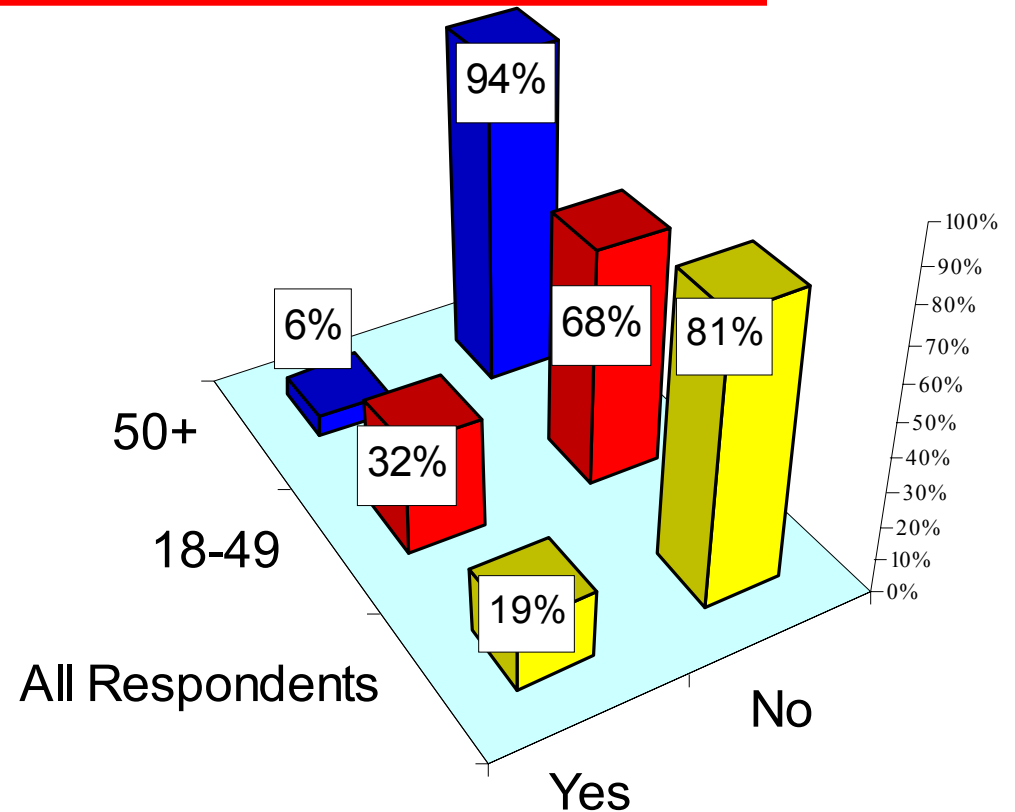
NOTE: 36% of Sample Asked



COOPER AND SECREST ASSOCIATES, Inc.

# Used Mp3 Technology?

	YES	NO
<b>Total</b>	<b>19%</b>	<b>81%</b>
Core Listeners	12%	88%
Battleground	20%	80%
<b>Core Non-Listeners</b>	<b>26%</b>	<b>73%</b>
Radio Gainers	21%	78%
Radio Drifters	20%	79%
<b>Music Gainers</b>	<b>26%</b>	<b>74%</b>
Music Drifters	13%	87%
<b>Strong Country Purchaser:</b>	<b>14%</b>	<b>86%</b>
P1	12%	88%
<b>Men 18-34</b>	<b>51%</b>	<b>48%</b>
Men 35-49	25%	75%
Men 50-65	12%	88%
Men 60+	3%	97%
<b>Women 18-34</b>	<b>29%</b>	<b>71%</b>
Women 35-49	24%	75%
Women 50-65	7%	93%
Women 65+	1%	97%

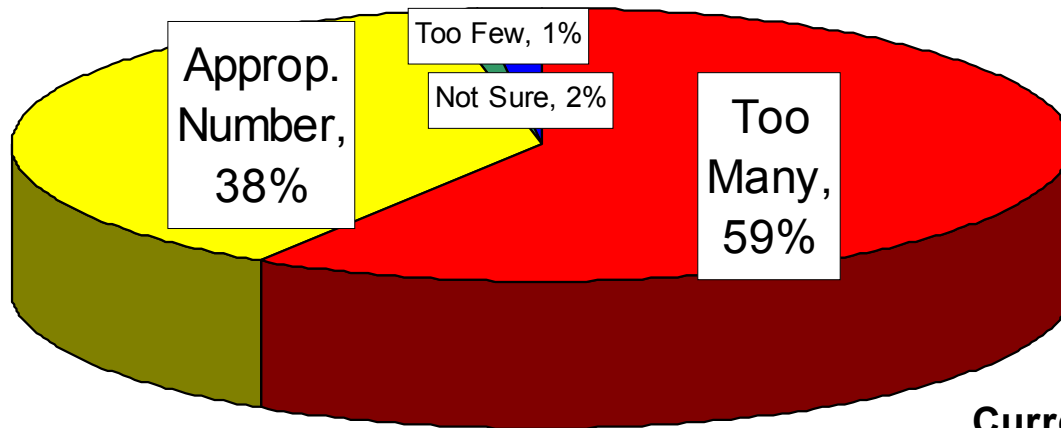


- Not surprisingly, Mp3 use is higher among young men and women.
- Among radio and *especially* music gainers, Mp3 use is higher than on average.
- Strong Country Purchasers are not Mp3 users.

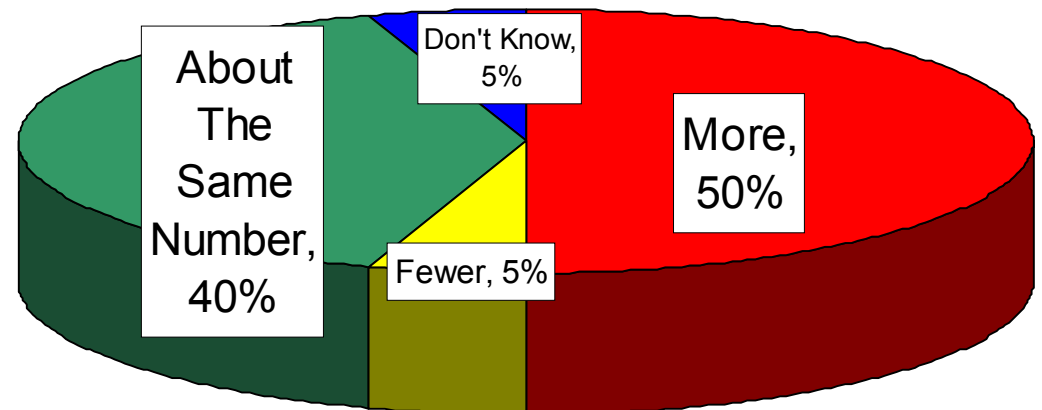
COOPER AND SECREST ASSOCIATES,  
Inc.

# Spot-Load Concerns

## Current Amount of Commercials?

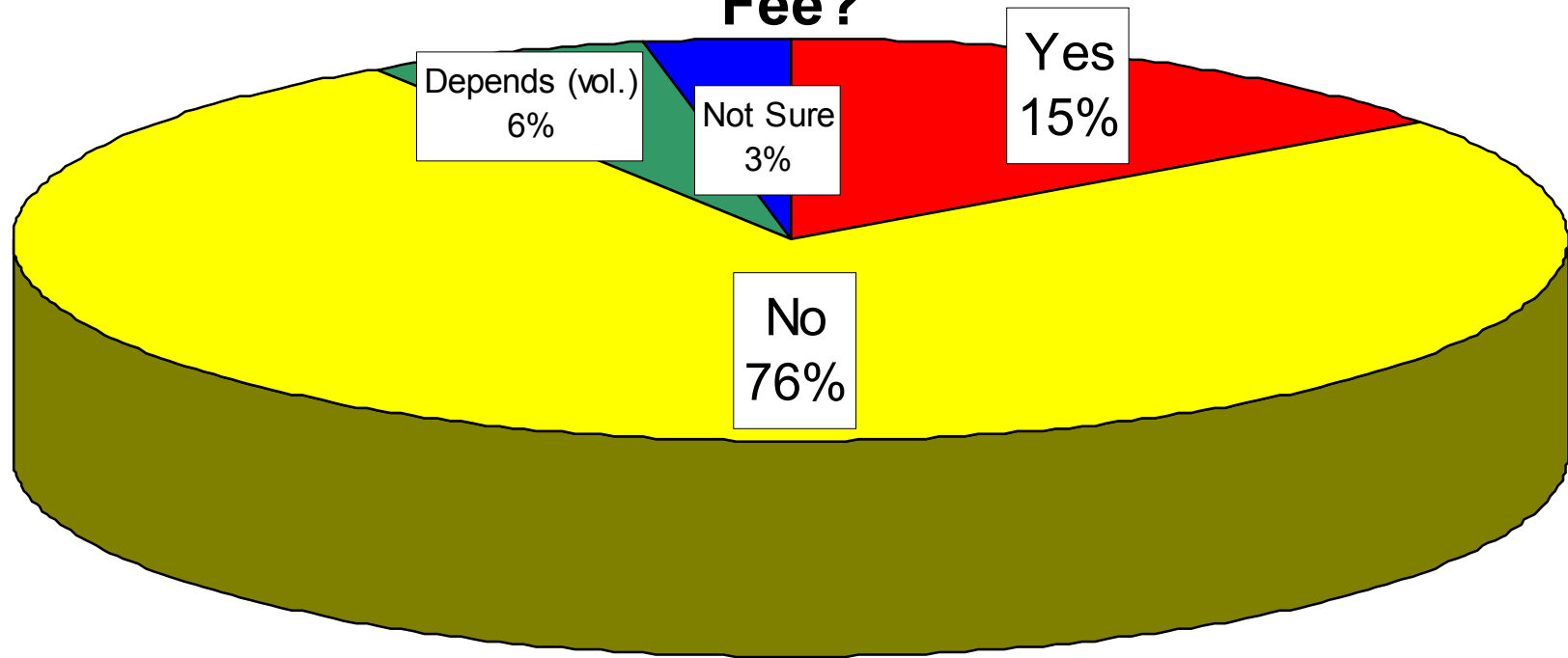


## Current Amount of Commercials compared to Five Years Ago?



# Commercial-Free Radio?

## Commercial-Free Radio for \$10 Monthly Fee?



## Driving the Country Vote...

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1. The image of country music is exceptionally strong and unlike other types of music, or numerous political candidates including Al Gore, it is not in need of rehabilitation.
2. Country's top performers are also rated highly and in the post September 11<sup>th</sup> environment "the country appeal" – sincerity, keeping it real - is what many are yearning for.
3. The combination of the public's current values— increased focus on religion, family, compassion, personal freedom and patriotism – alongside country music's winning attributes - telling a story, making positive contribution to American life, and others— position country music very effectively as the leading choice across all but a few significant demographic groups of the sample.

## Lurking Issues...

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4. While country music, country artists, and country radio are well received, there are a few lurking gray clouds over the horizon that thwart country music's ability to broaden its appeal.
  - Country music's core listening audience is aging, much like the rest of America (and very much like the GOP)
  - Country's star performers dominate the scene and make it difficult to showcase emerging new talent that might be the hot acts of tomorrow and spur listenership past the P1s.
  - In turn, this may contribute to reduced listenership with younger consumers who are looking for the next "extreme sports star."
  - These younger consumers, men in particular, are drawn to other delivery methods of music – CDs, online, Mp3s – and have strong criticisms of country music radio in terms of "DJs talk too much" and "too many commercials."

## Challenges to the Industry...

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5. The challenge to country music radio is not unlike the challenges facing both political parties – maintaining core supporters while making inroads with the swing voters that prove decisive in critical elections.

In this case, the task for country music radio is to maintain its own core audience, but expand its reach to men 18-34, where an overall amenable attitude towards country music and radio is waiting to be translated into increased market share.

6. Country radio drifters are a prime target for increased listening.

They volunteer that their tastes have changed, they prefer a different style of music, and have specific format criticisms. It is imperative to think “outside the box” to recapture this group – television and Mp3 strategies should be given consideration.

How can these Radio Drifters be appealed to without alienating the core of country listeners?

*...That's your mission.*