



edison media research

"Record Breakers"

AR-UK
ABSOLUTE RADIO UK
create - enhance - realise

music week


NOP World
United Business Media

How the survey was conducted:

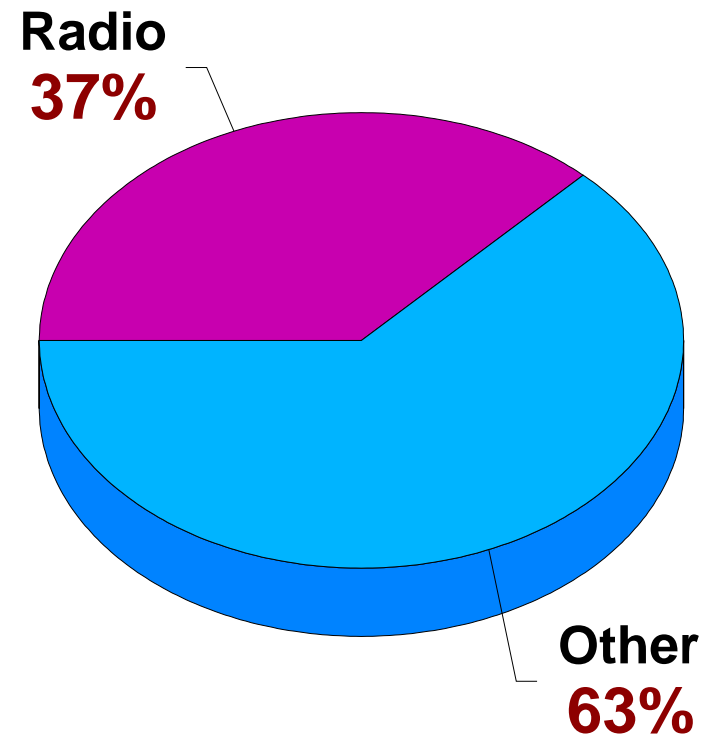
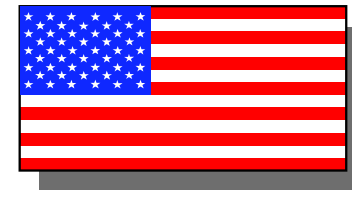
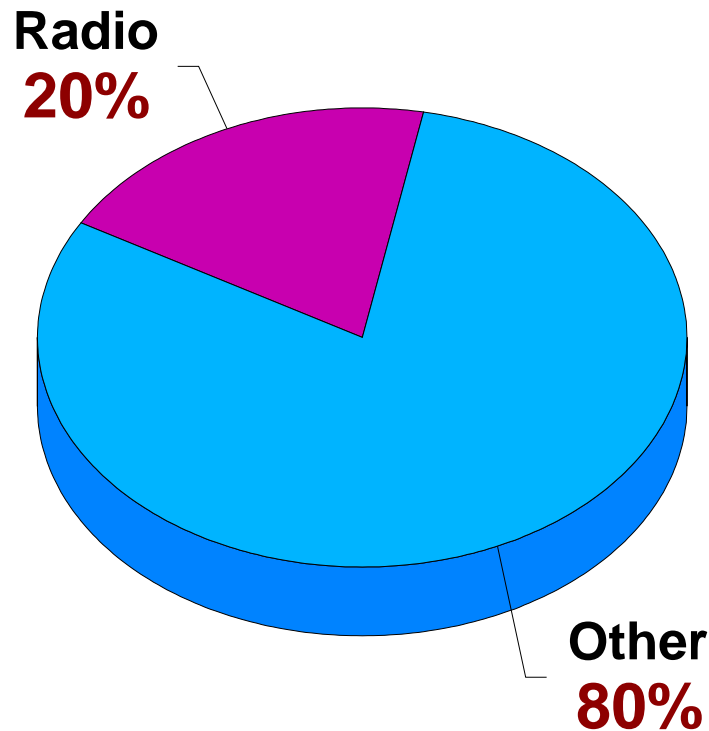
- 501 Total Interviews
- Ages 15-44
- Telephone Interviews in UK conducted 5th-17th March 2002 by NOP
- Data compared to Edison Media Research's "National Record Buyers Survey" of 16 to 40 year olds conducted in the US May 2001
 - UK data from 16 to 40s used in comparison graphs

Make this survey your resource

- We have crosstabs by:
 - Sex
 - Age
 - Format
 - Downloading behavior
 - much more
- Stay tuned to Music Week for more research reports

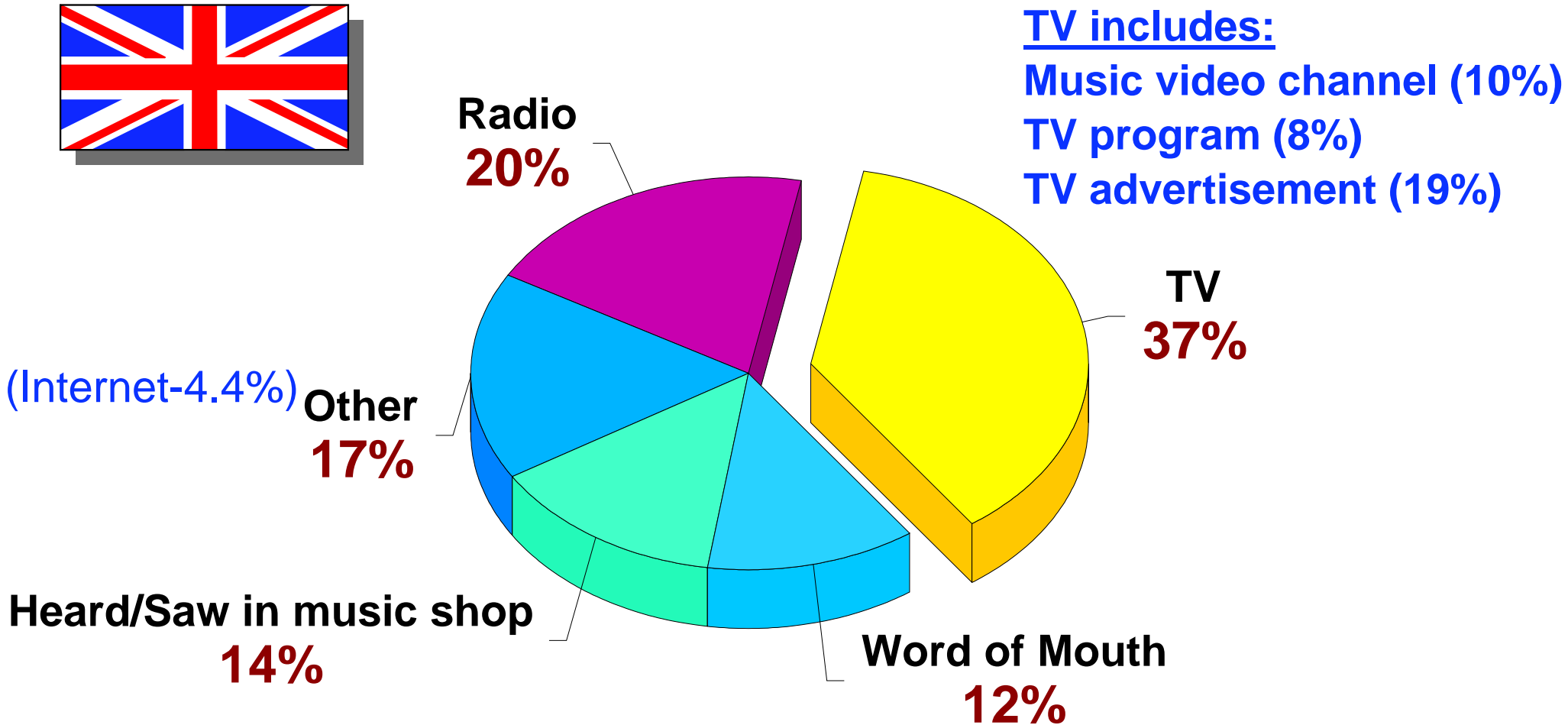
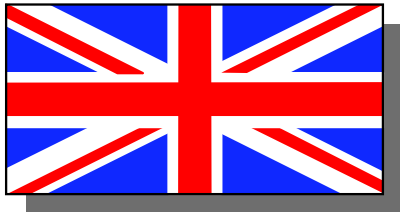
*The Influence of
Radio and Television
on purchase behavior*

How did you *first* find out the last CD you bought was available?



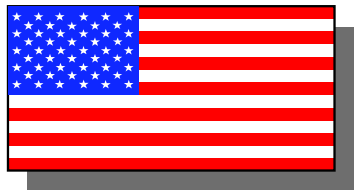
Base: Purchased music in last 12 months

How did you *first* find out the last CD you bought was available?



Base: Purchased music CDs or cassettes in last 12 months

How did you *first* find out the last CD you bought was available?



Radio
37%

TV includes:

Music video channel (6%)

TV program (3%)

TV advertisement (5%)

TV
14%

(Internet-6.4%)

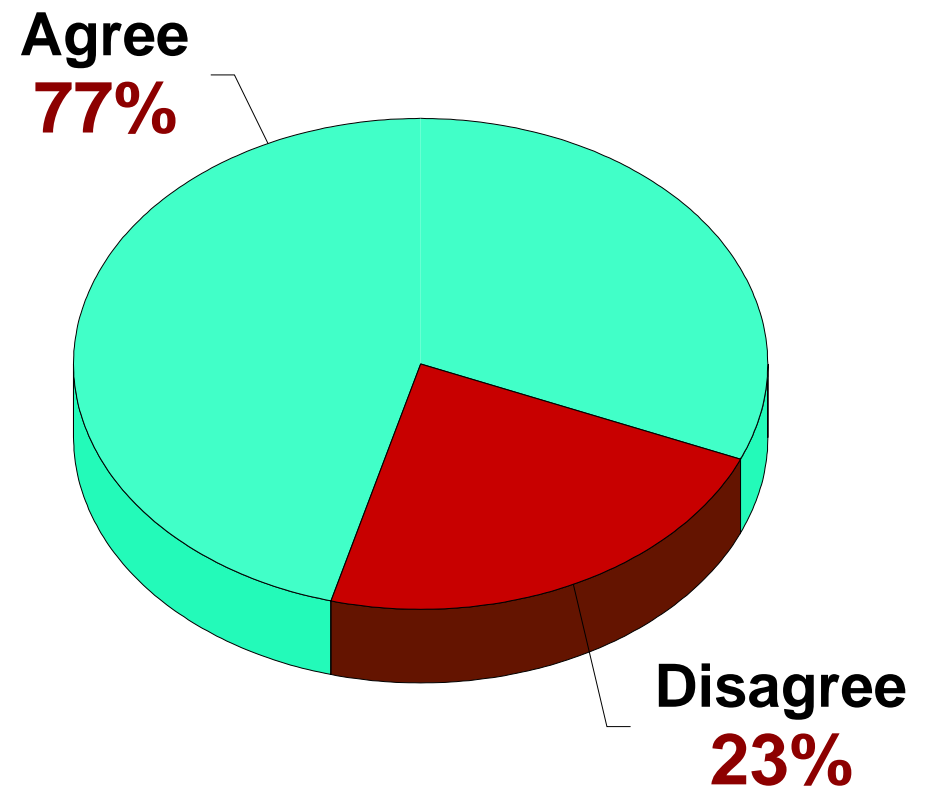
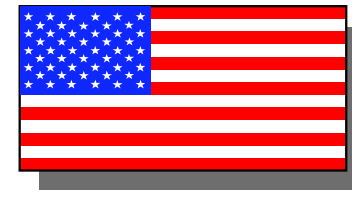
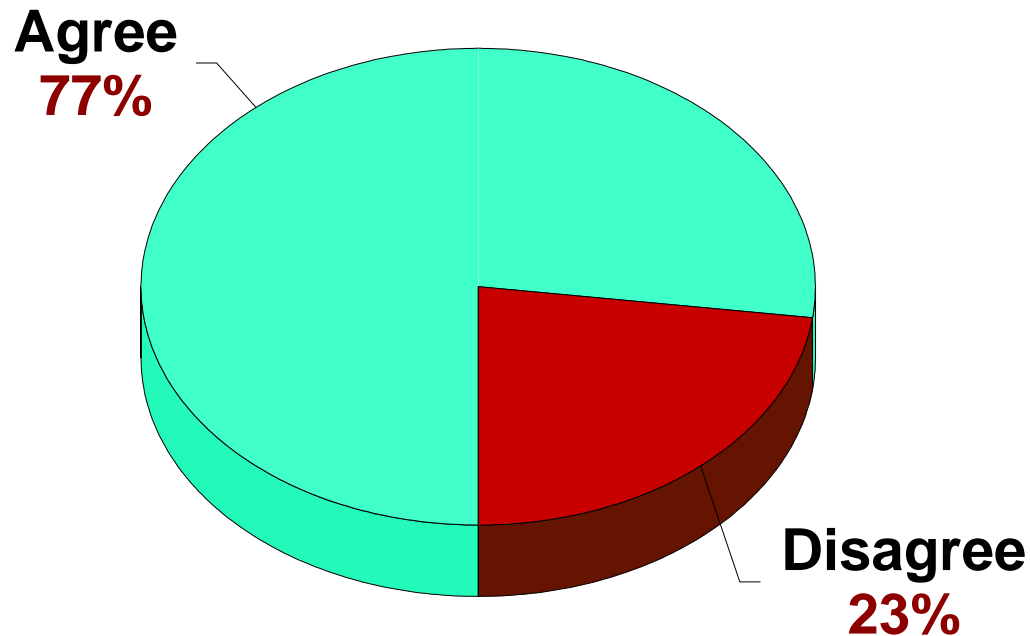
Other
19%

Word of Mouth
16%

Heard/Saw in music shop
14%

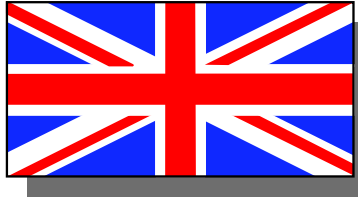
Base: Purchased music CDs or cassettes in last 12 months

"You won't buy a new album or tape unless you have already heard a few songs from it that you like on the radio"

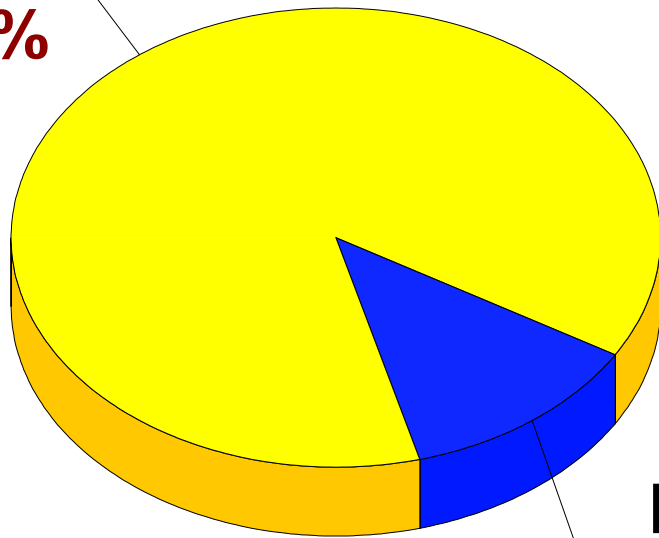


Base: Purchased music in last 12 months

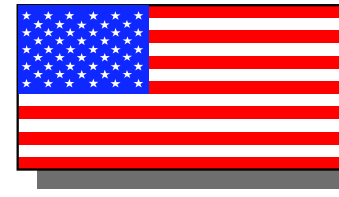
Have you purchased any music albums or tapes for yourself in the last 12 months?



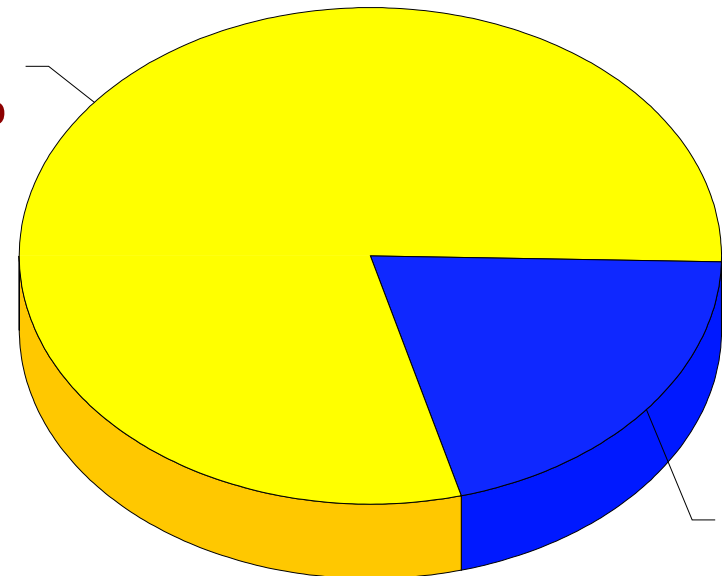
Yes
88%



No
12%

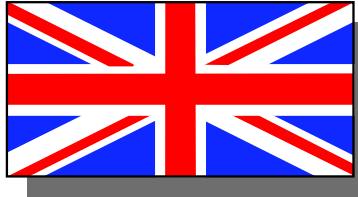


Yes
80%

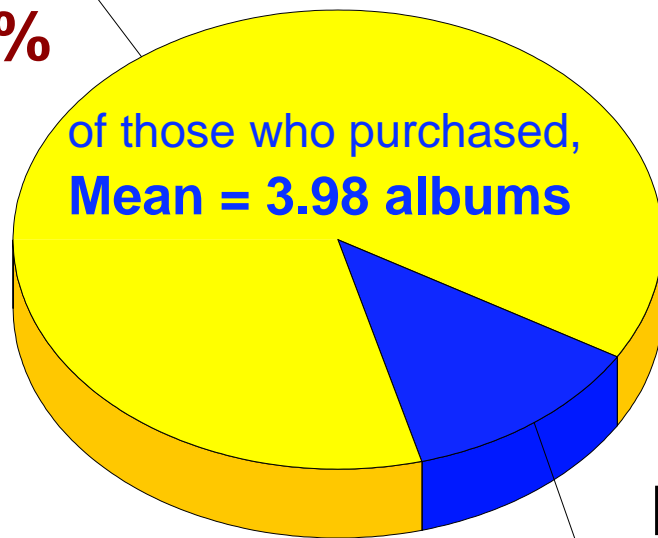


No
20%

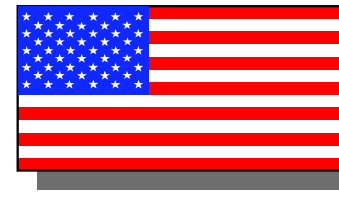
Have you purchased any music albums or tapes for yourself in the last 12 months?



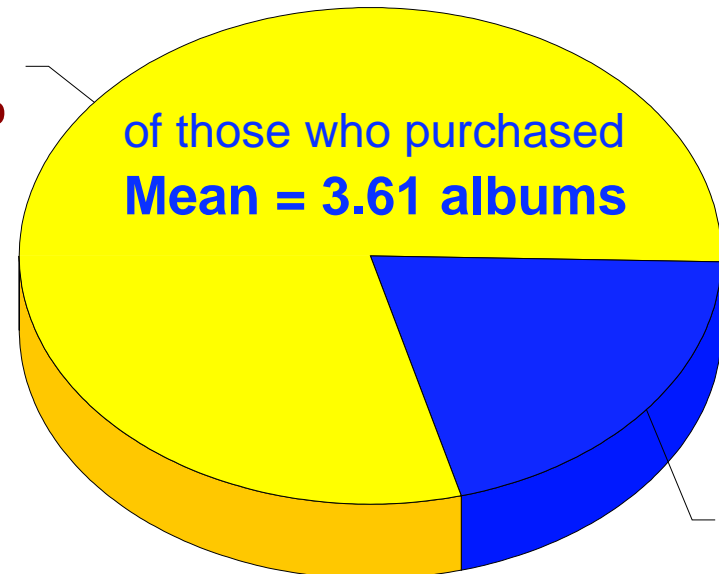
Yes
88%



No
12%

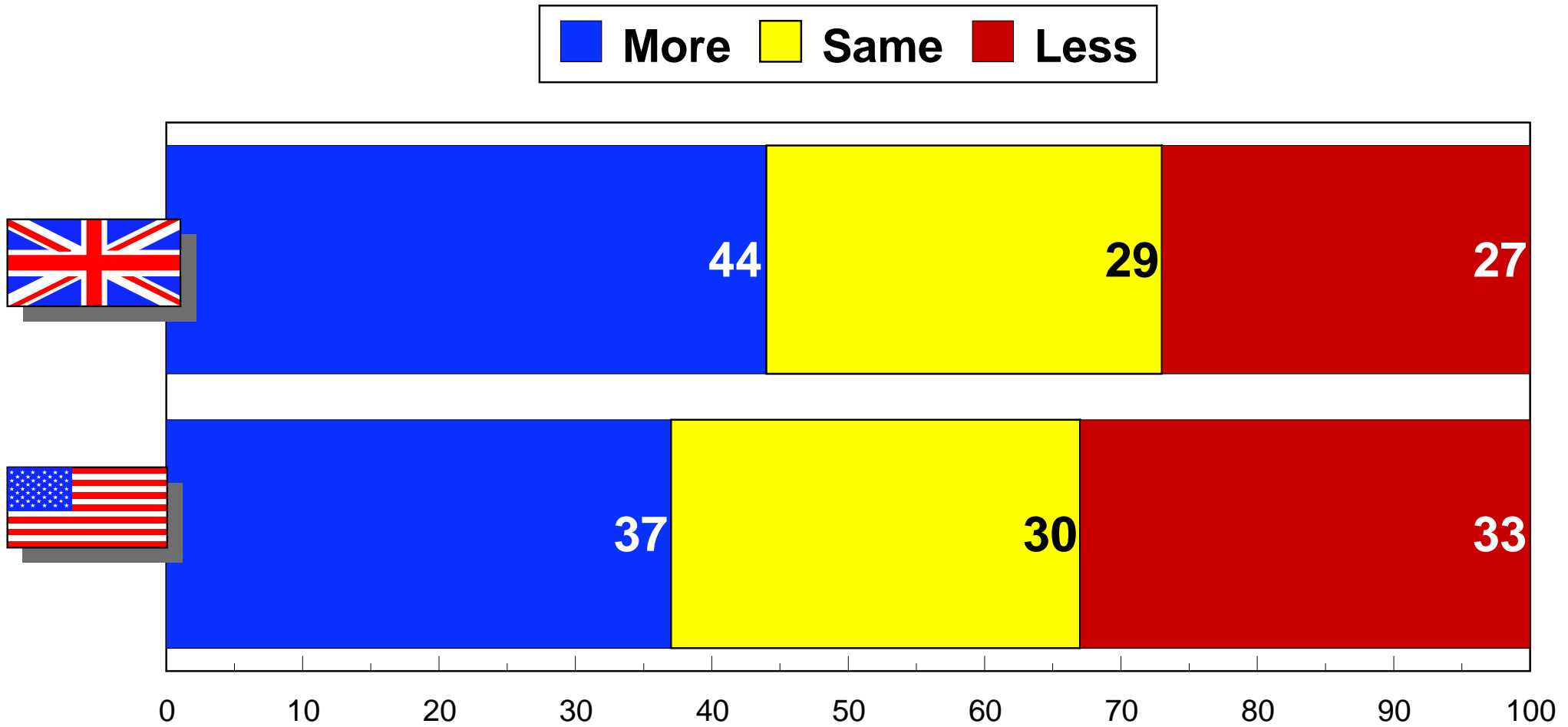


Yes
80%



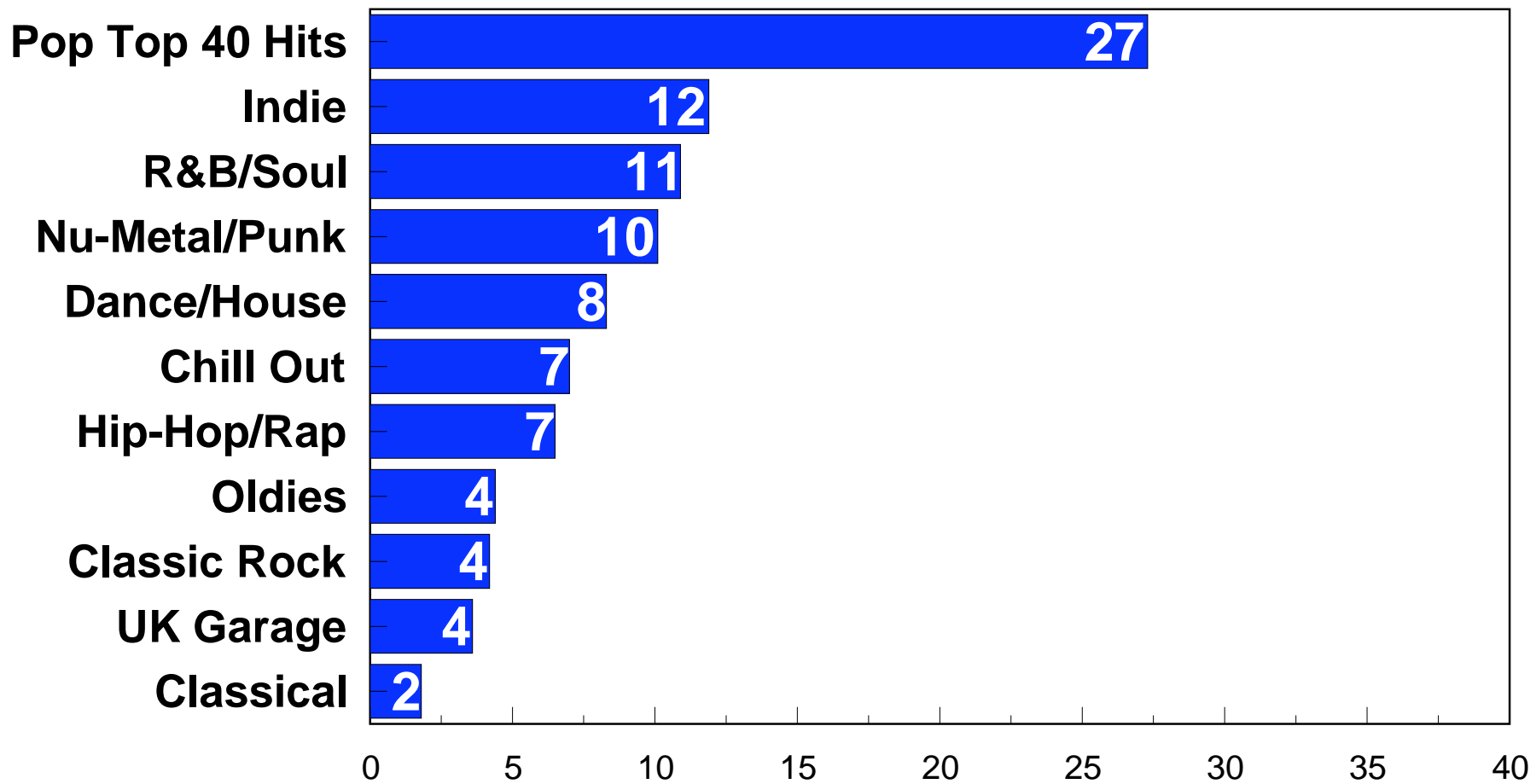
No
20%

Is this more or less than what you had purchased in the previous 12 months?



What are 15 to 44s in the UK purchasing?

What kind of music would you say you buy the most?

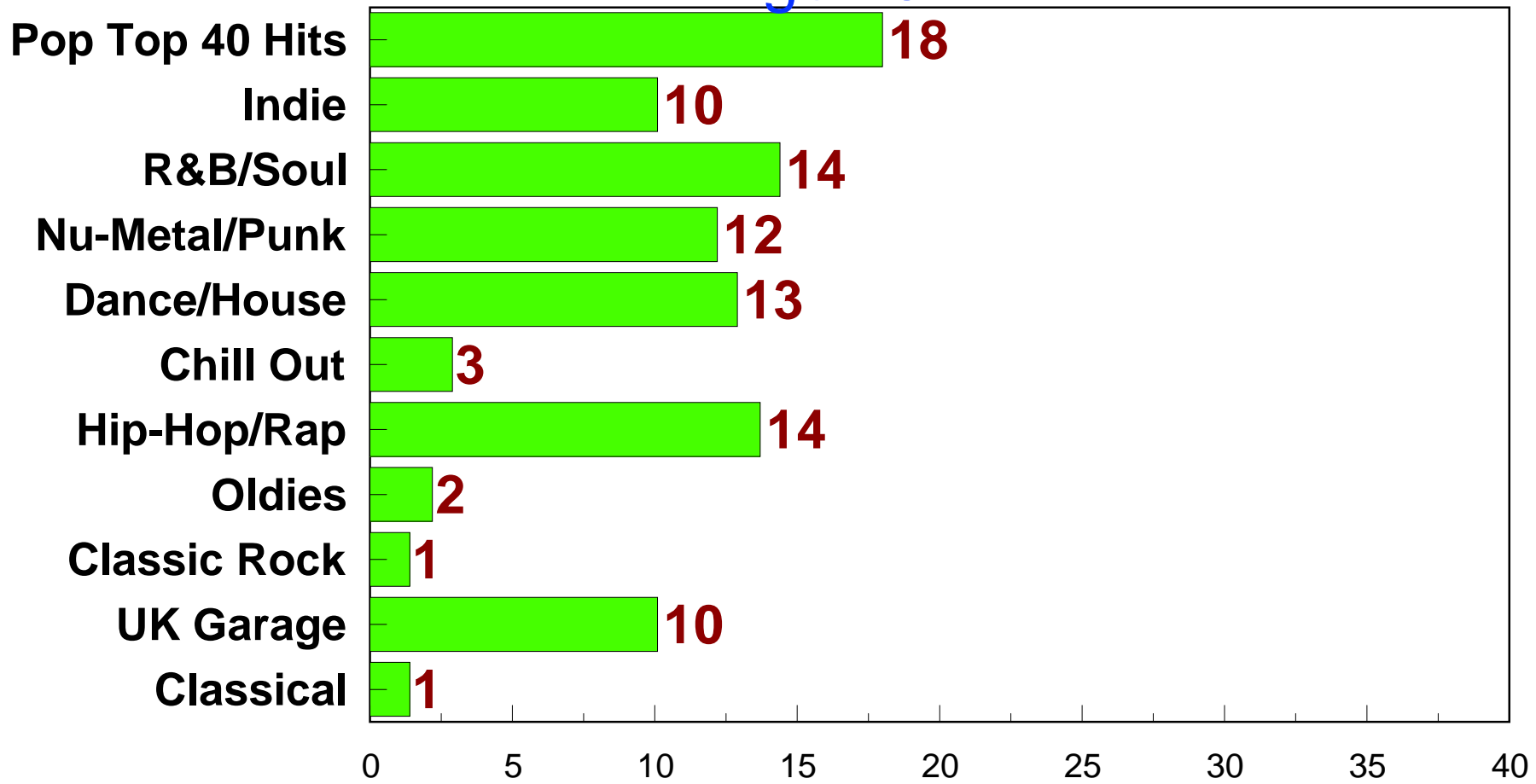


Base: Purchased music albums or tapes in the last 12 months

What kind of music would you say you buy the most?



Age 15-24

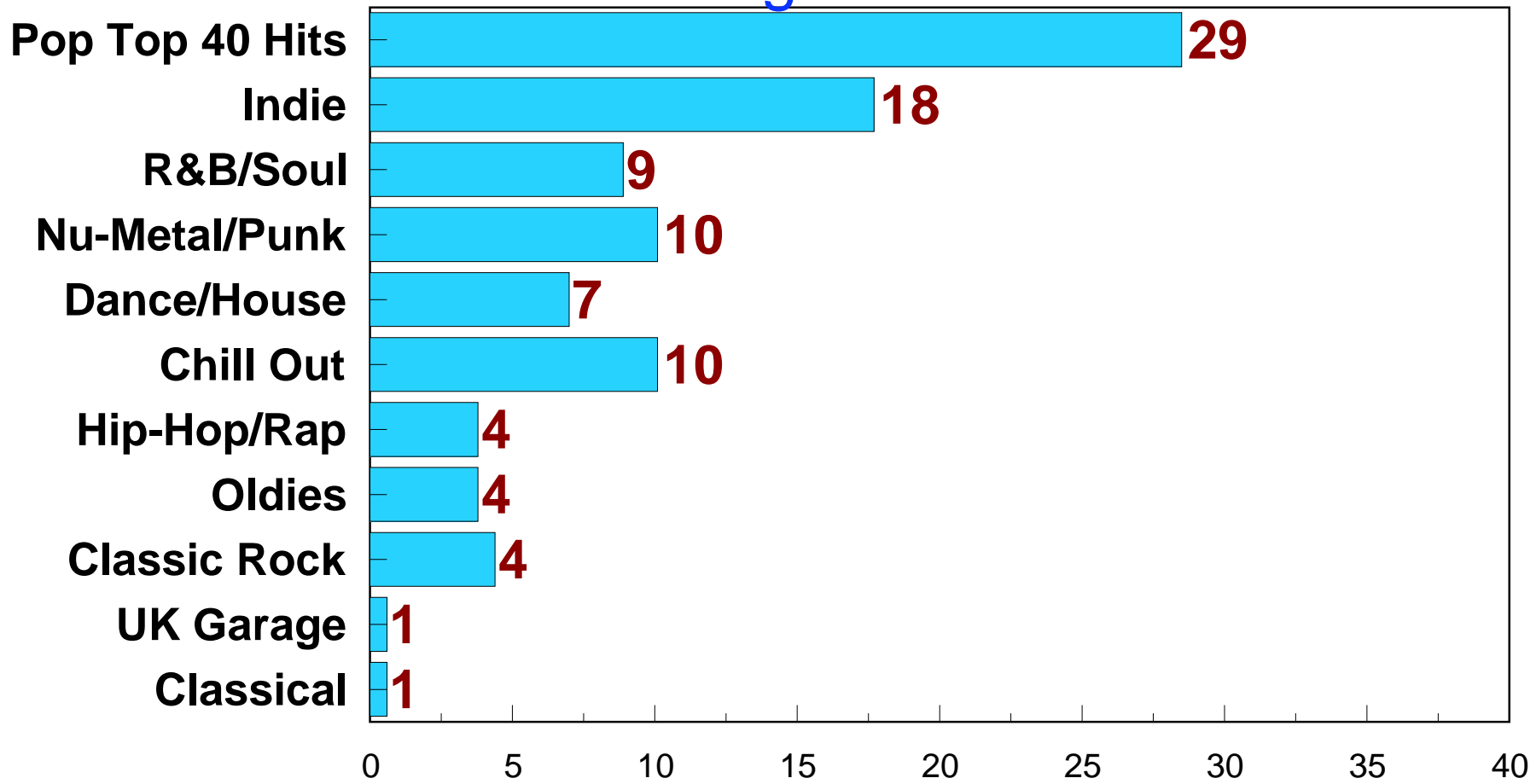


Base: Purchased music albums or tapes in the last 12 months

What kind of music would you say you buy the most?



Age 25-34

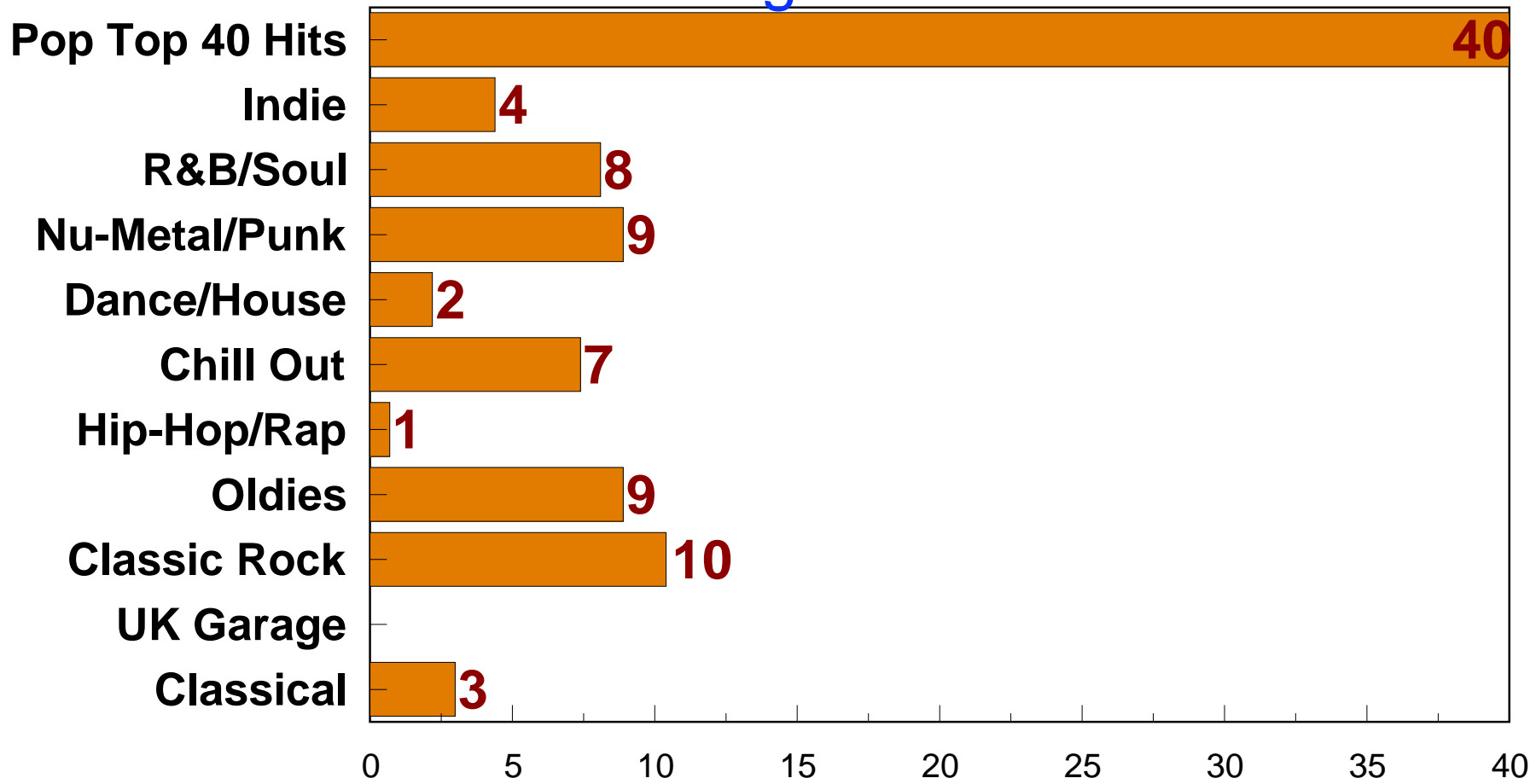


Base: Purchased music albums or tapes in the last 12 months

What kind of music would you say you buy the most?

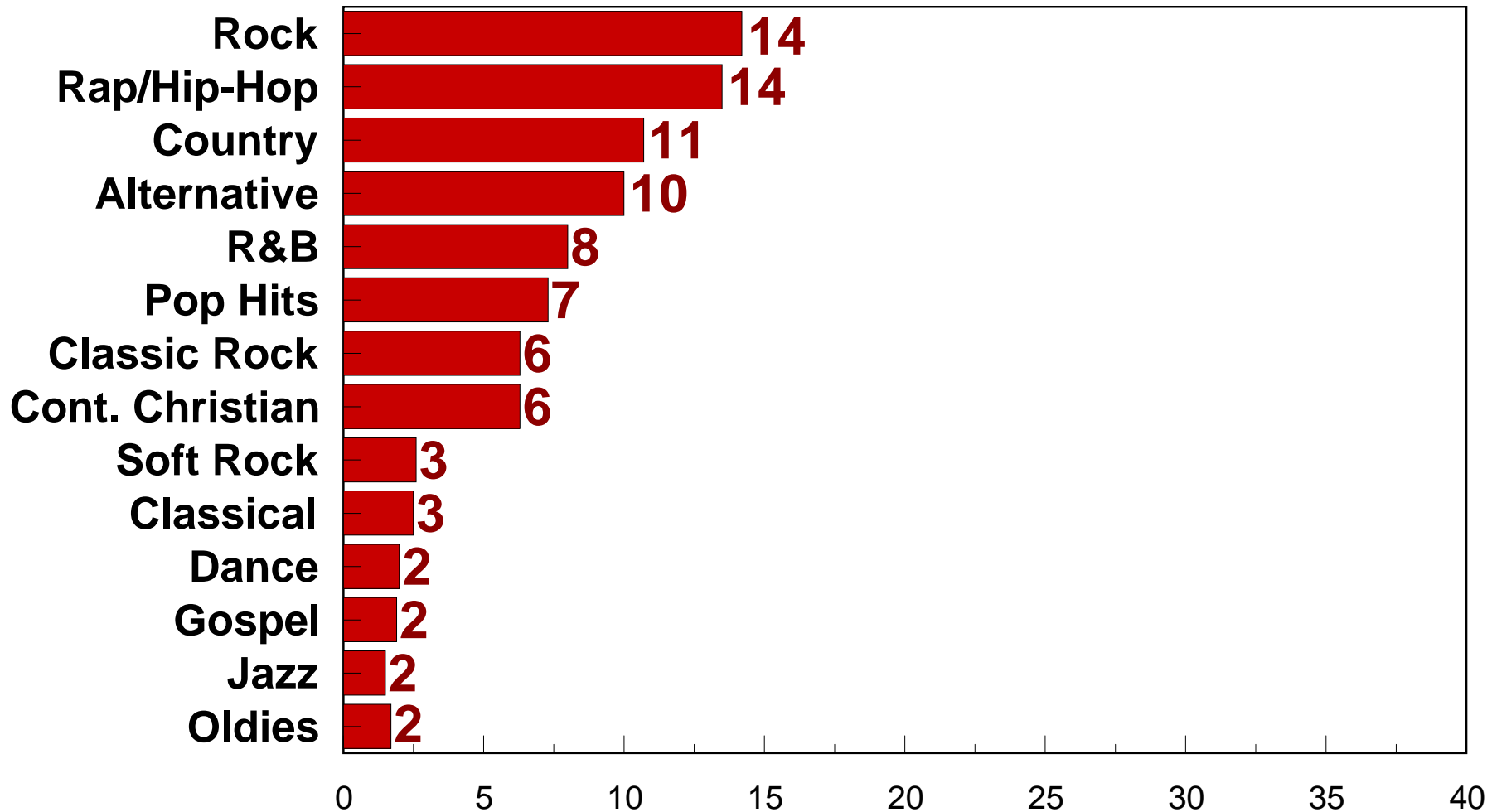
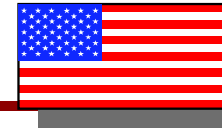


Age 35-44



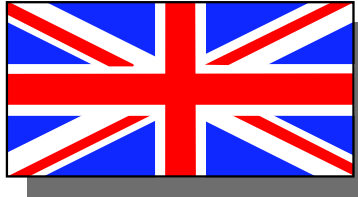
Base: Purchased music albums or tapes in the last 12 months

What kind of music would you say you buy the most?

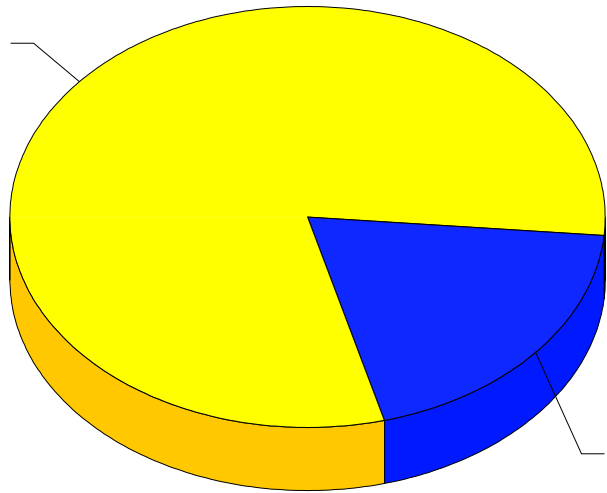


Base: Purchased music albums or tapes in the last 12 months

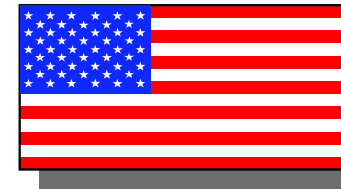
Have you ever purchased a compilation album or tape?



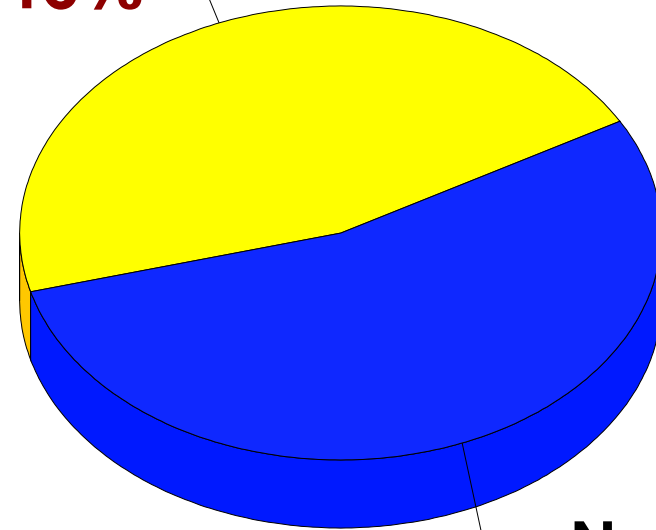
Yes
81%



No
19%



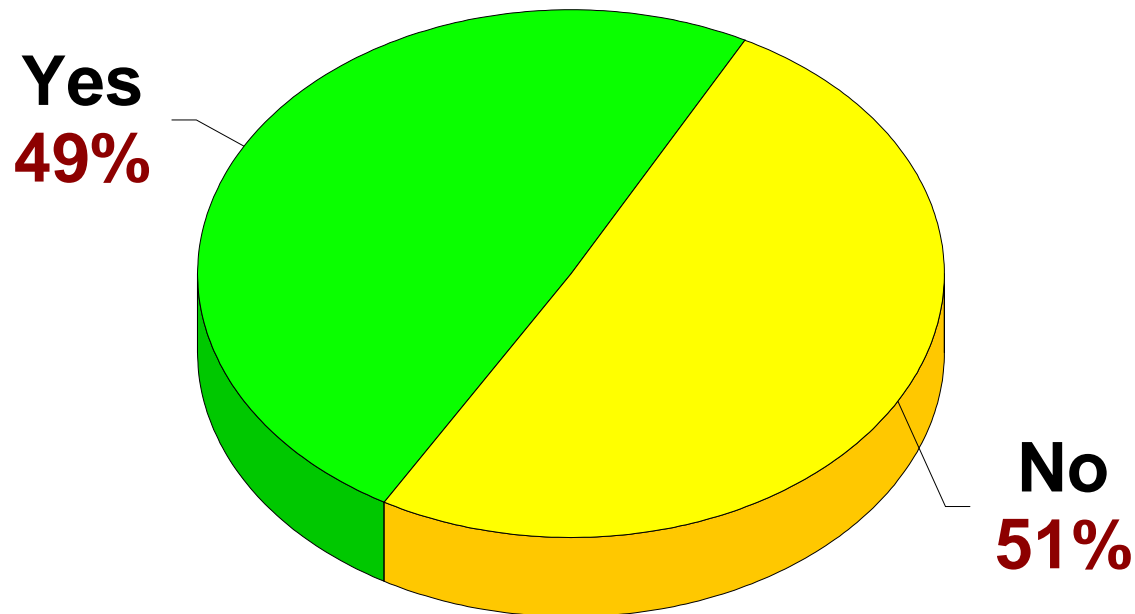
Yes
46%



No
54%

Base: Purchased music albums or tapes in the last 12 months

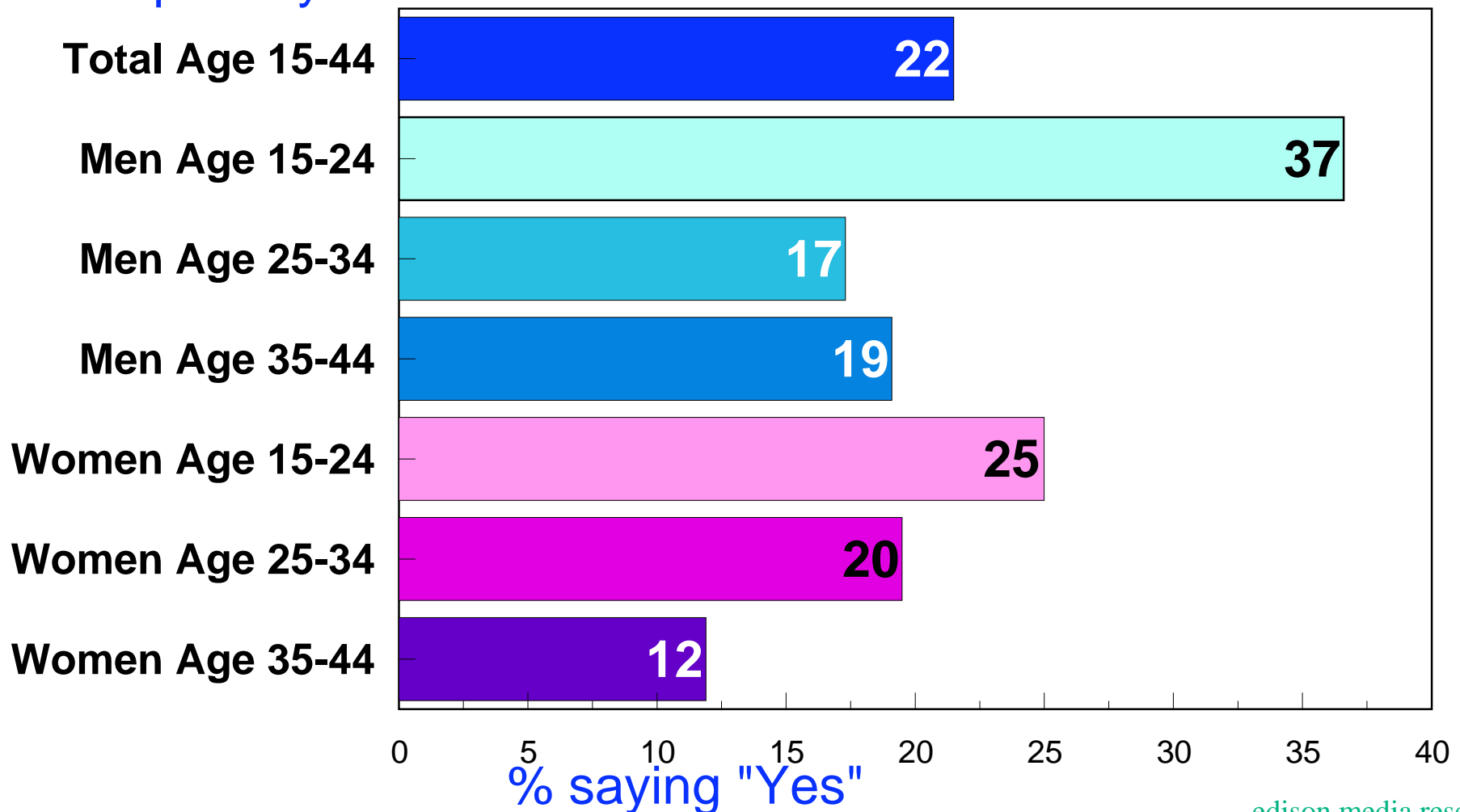
"Have you gone on to buy an album by an artist or group after hearing music by that artist featured on a compilation?"



Base: Purchased compilation albums or tapes

A large number of consumers in the UK are purchasing illegal copies

"Have you ever purchased music that has been burnt or copied by someone else from a friend/market trader?"



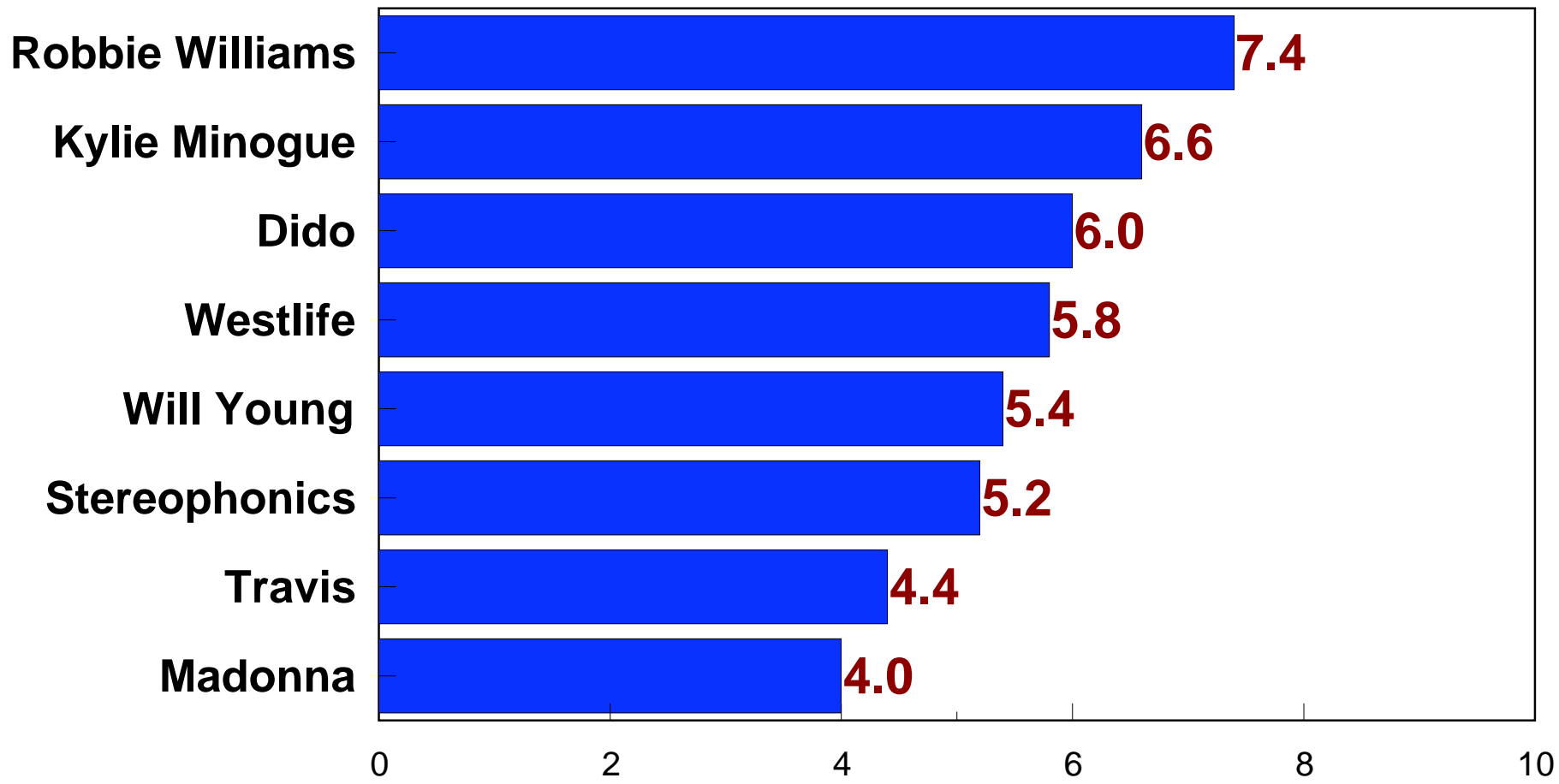
Base: Purchased music albums or tapes in the last 12 months

*Most anticipated
releases include...*

Robbie Williams, Kylie Minogue mentioned most on Unaided basis

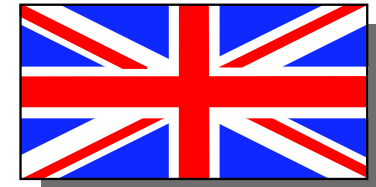


What three artists' next album or tape are you most likely to purchase?



% mentioning artist

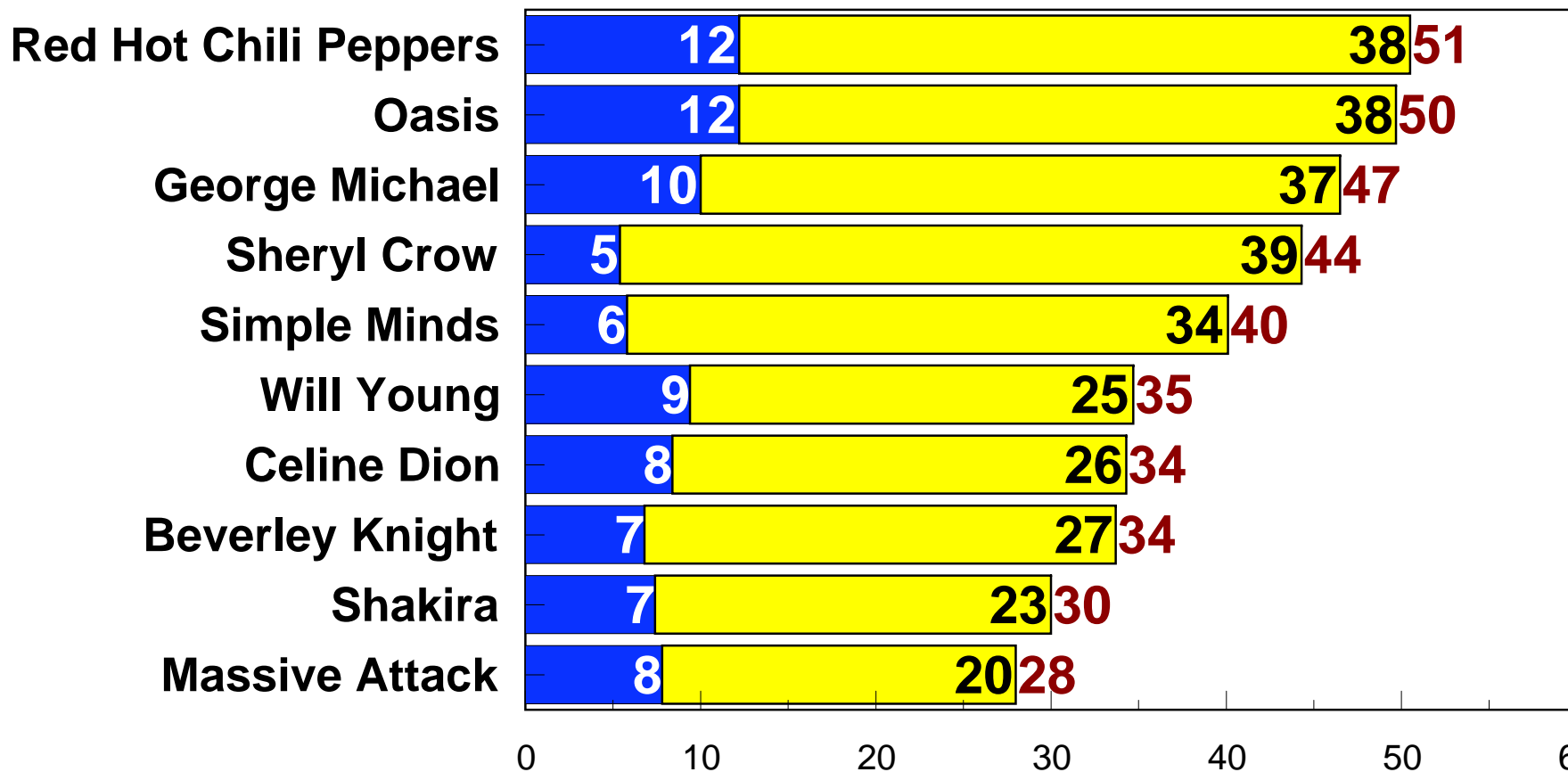
Red Hot Chili Peppers, Oasis, George Michael have the broadest "intent to buy"



How likely are you to buy an album by:

Page 1

■ Definitely will buy ■ Probably will buy

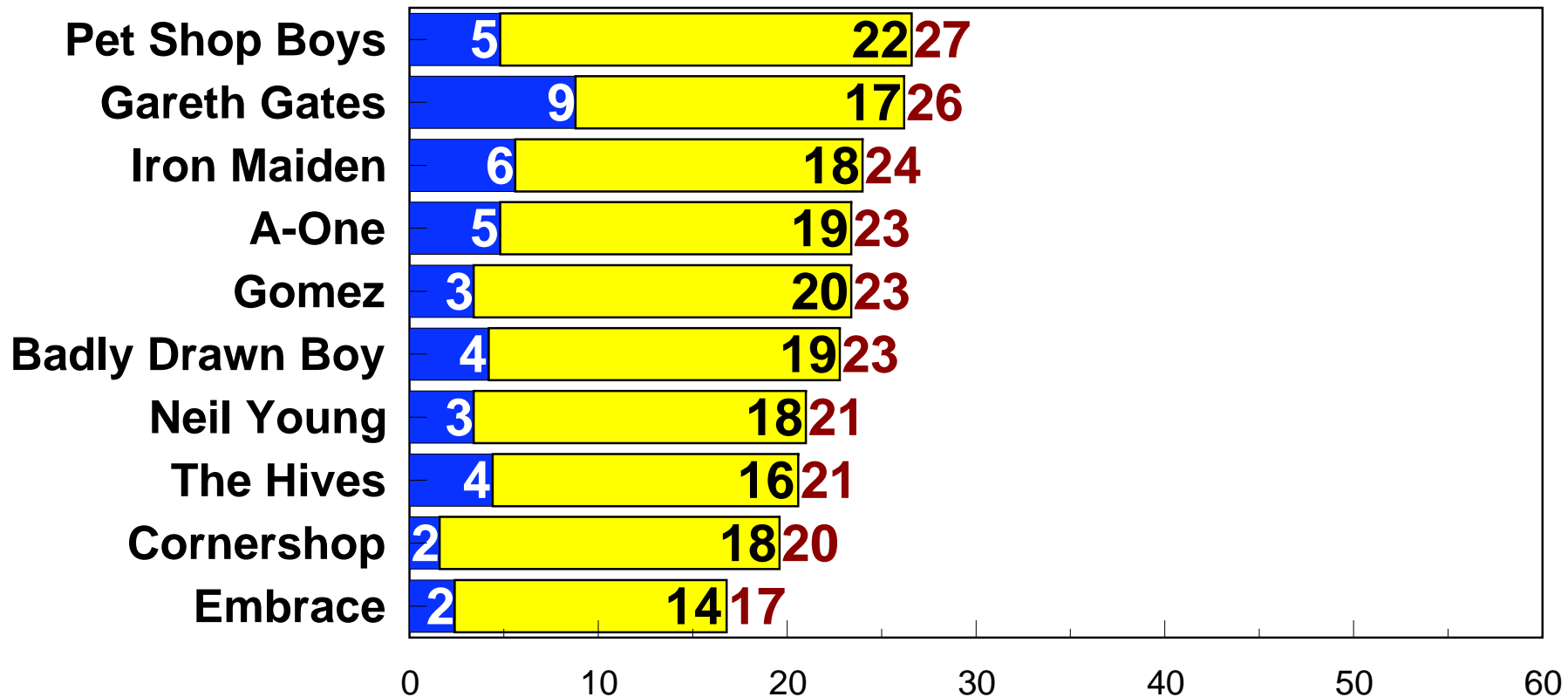


Red Hot Chili Peppers, Oasis, George Michael have the broadest "intent to buy"

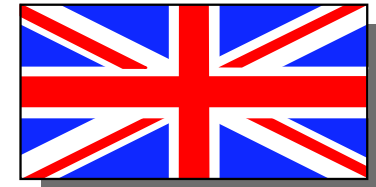


How likely are you to buy an album by:

■ Definitely will buy ■ Probably will buy



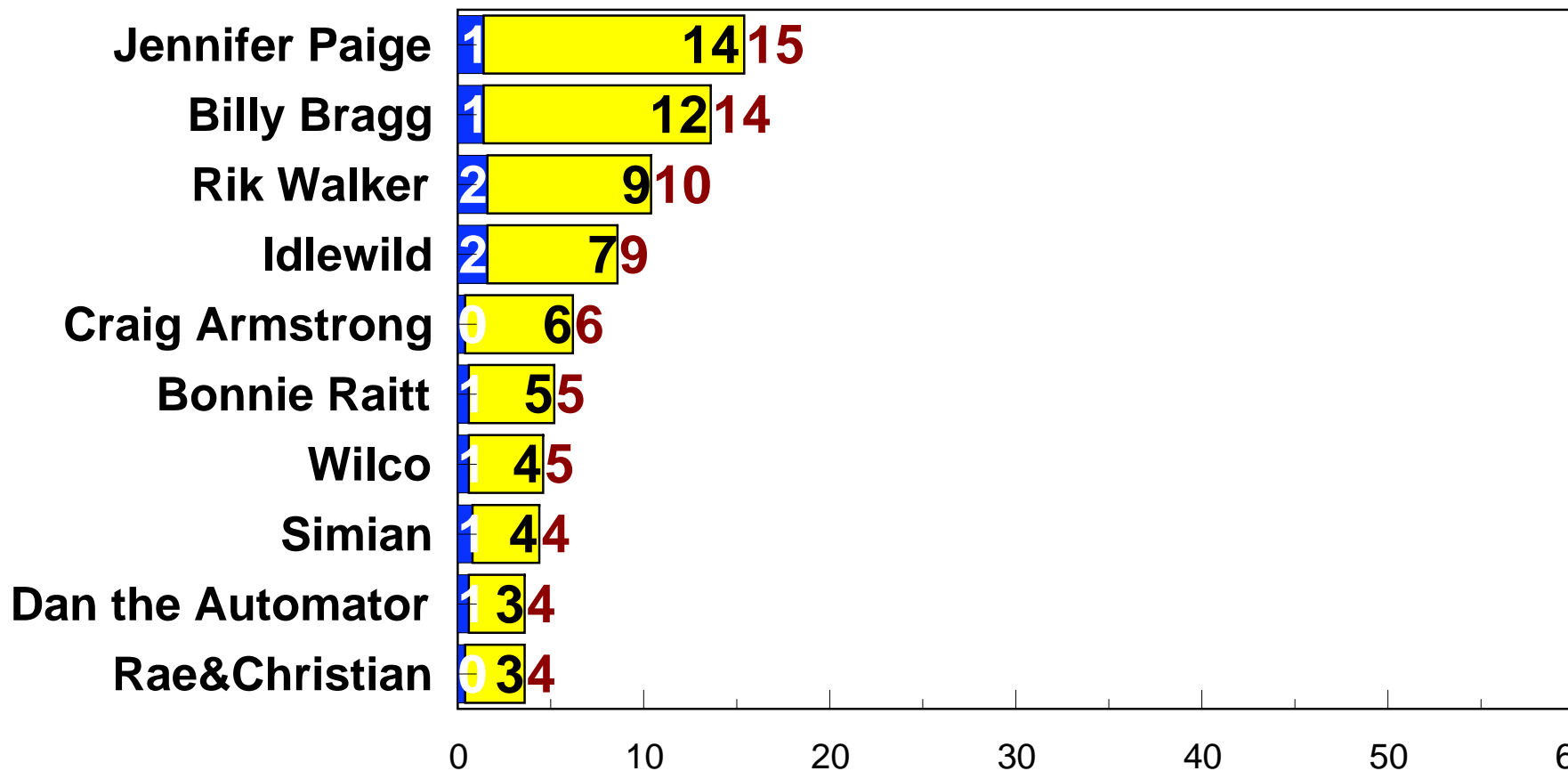
Red Hot Chili Peppers, Oasis, George Michael have the broadest "intent to buy"



How likely are you to buy an album by:

Page 3

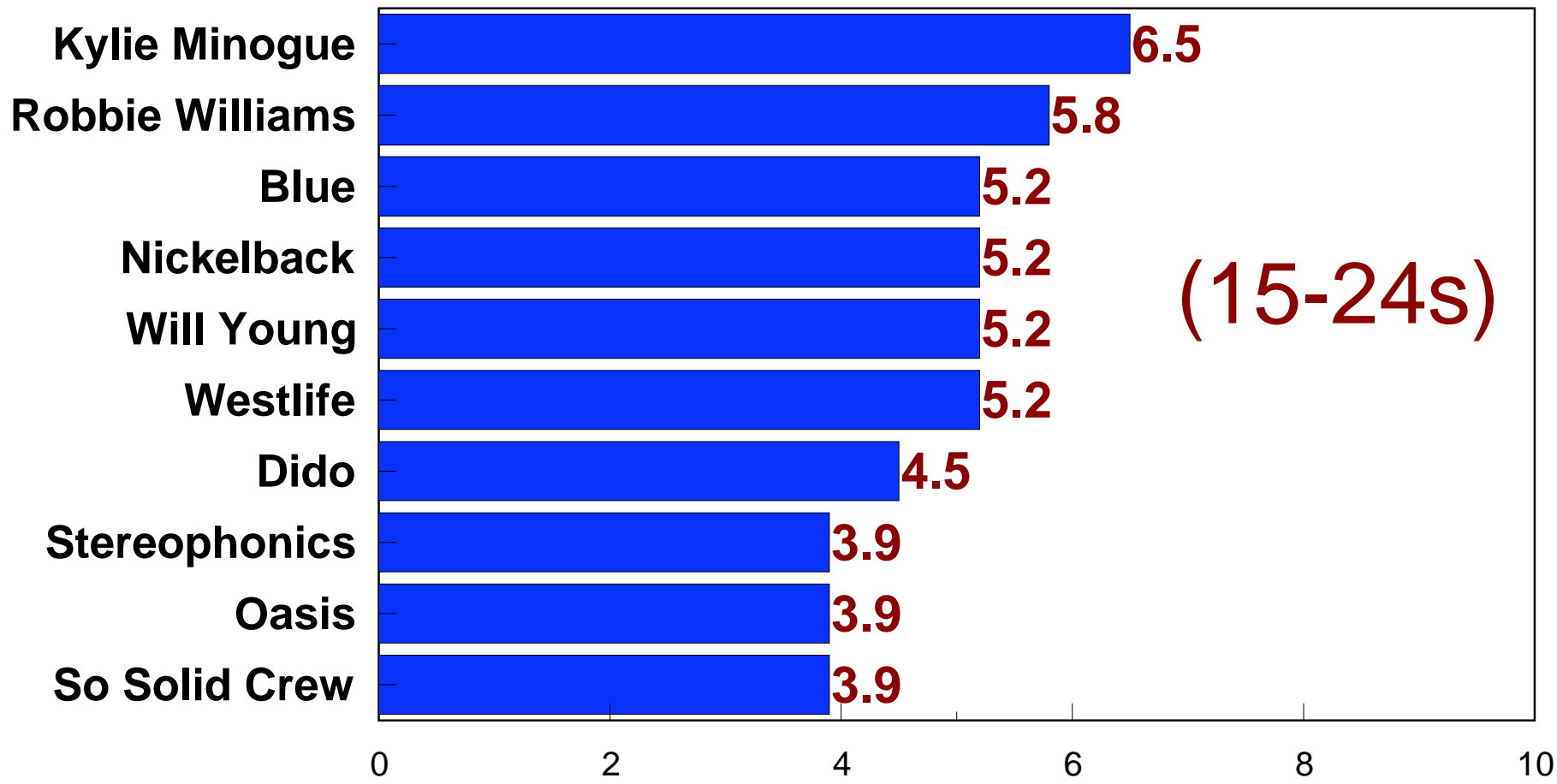
■ Definitely will buy ■ Probably will buy





Robbie Williams, Kylie Minogue mentioned most on Unaided basis

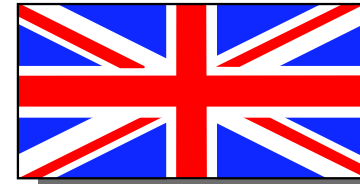
What three artists' next album or tape are you most likely to purchase?



(15-24s)

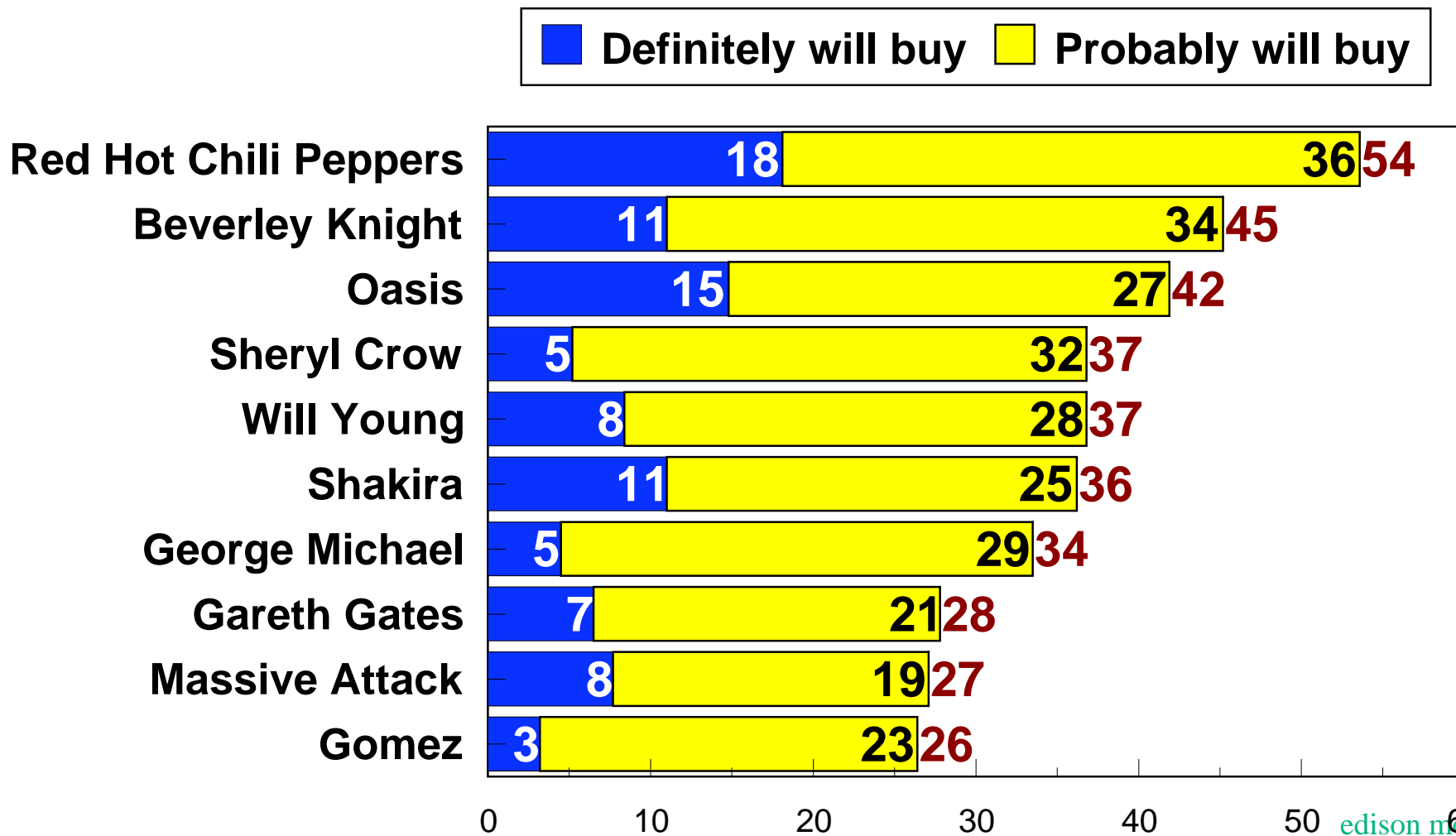
% mentioning artist

Red Hot Chili Peppers, Beverley Knight and Oasis have the broadest "intent to buy" (15-24s)

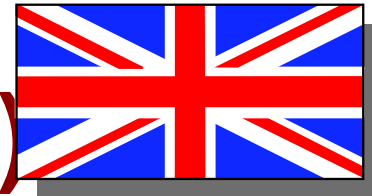


How likely are you to buy an album by:

Page 1

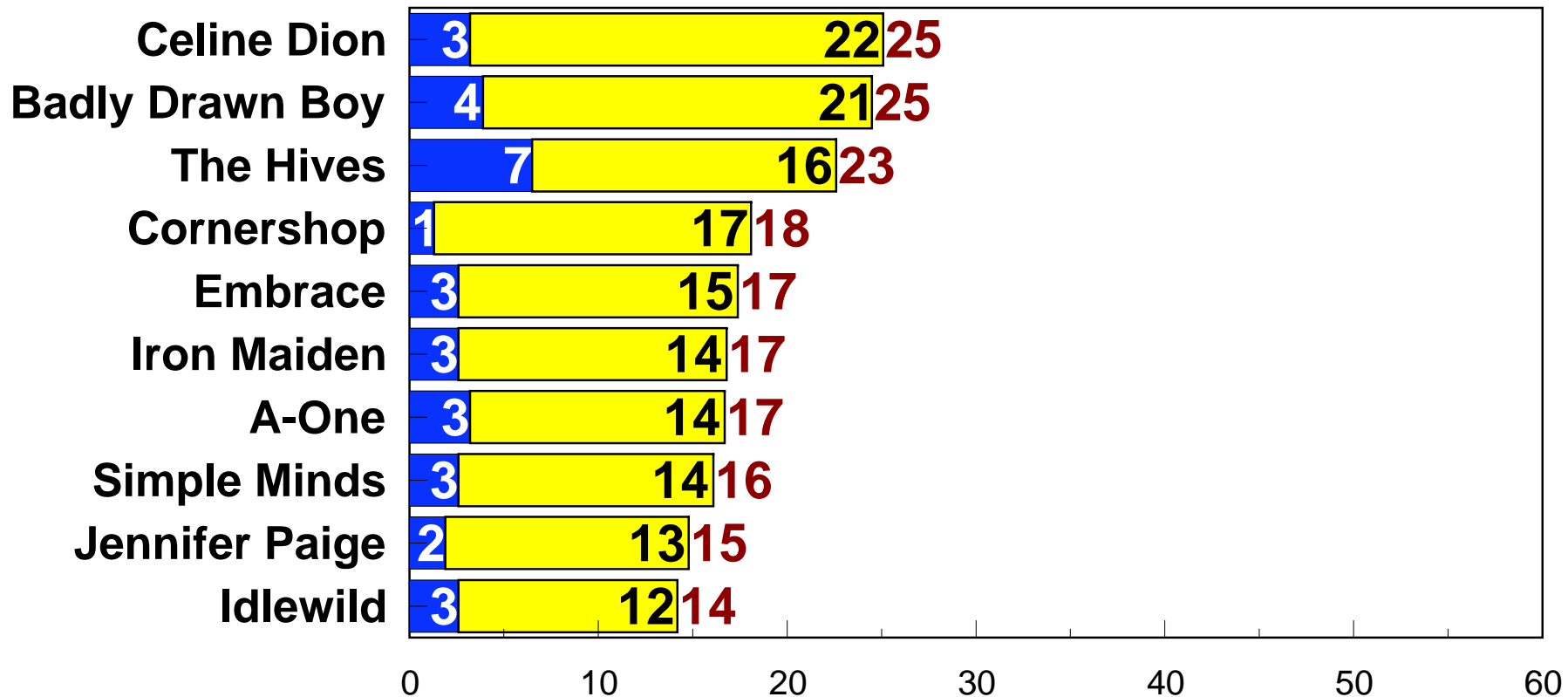


Red Hot Chili Peppers, Beverley Knight and Oasis have the broadest "intent to buy" (15-24s)

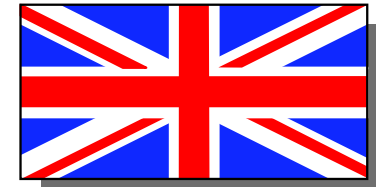


How likely are you to buy an album by:

■ Definitely will buy ■ Probably will buy



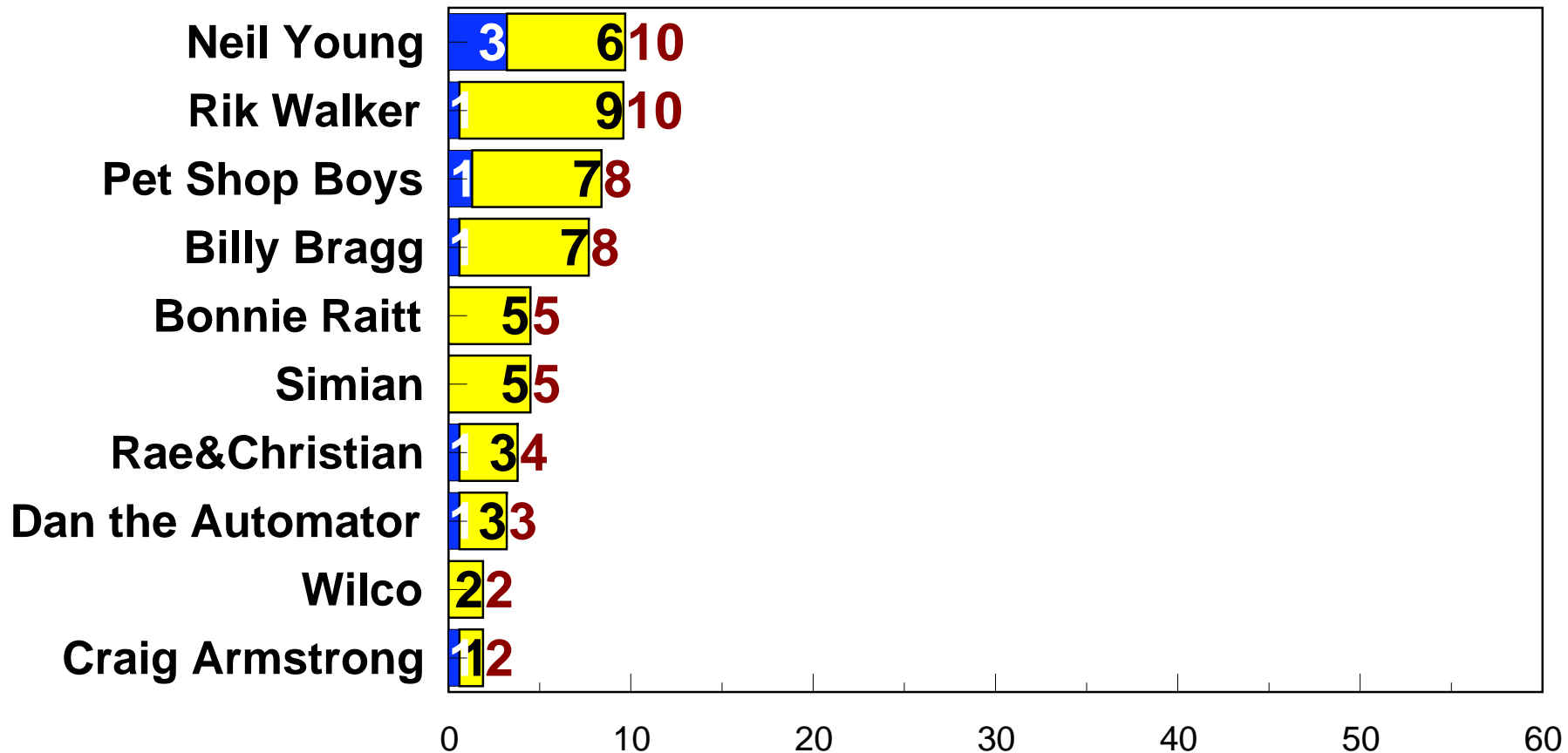
Red Hot Chili Peppers, Beverley Knight and Oasis have the broadest "intent to buy" (15-24s)



How likely are you to buy an album by:

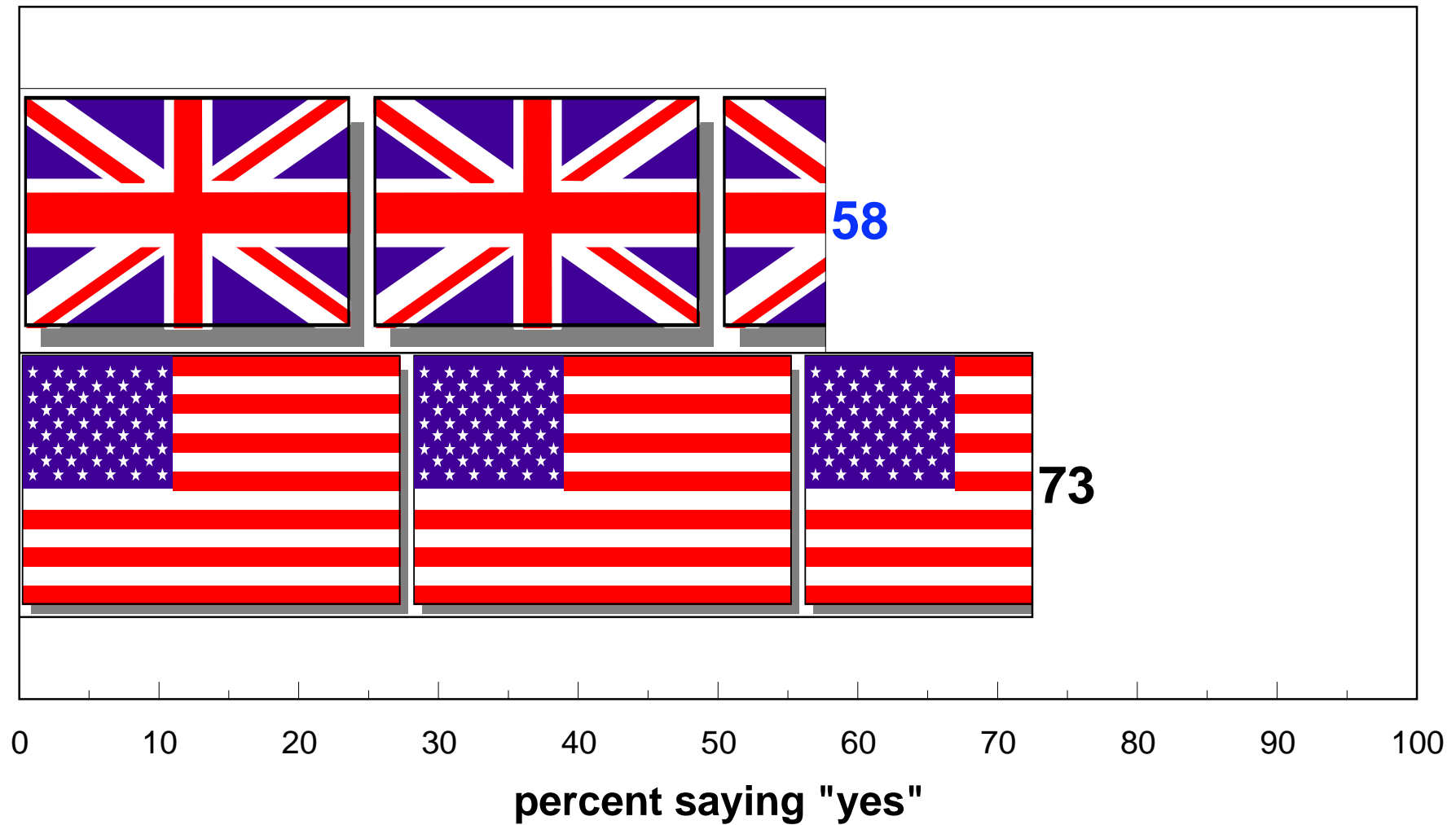
Page 3

■ Definitely will buy ■ Probably will buy

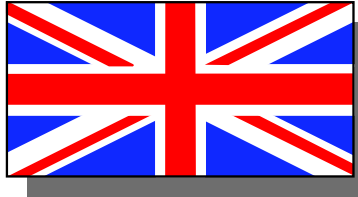


The Internet

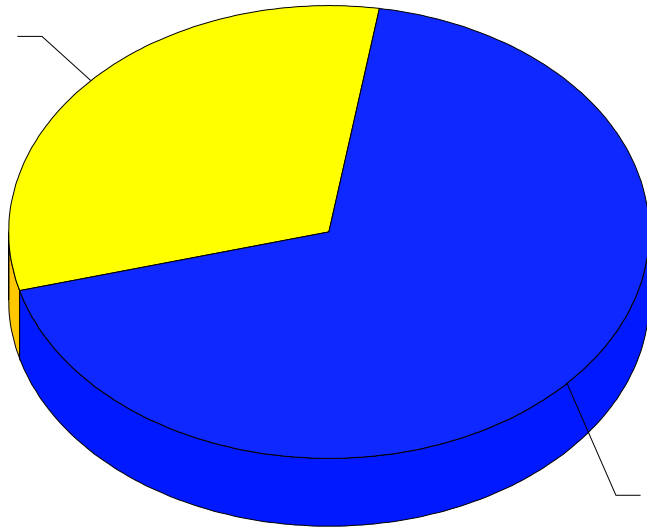
Are you online at home?



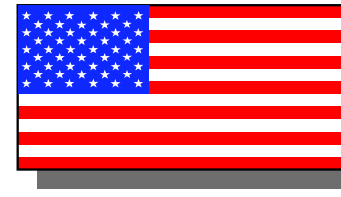
Have you ever downloaded music from the Internet for playback at another time?



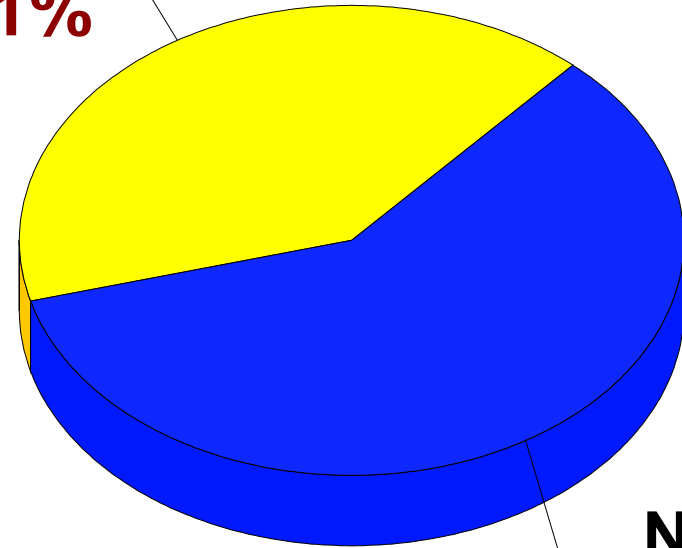
Yes
32%



No
68%



Yes
41%



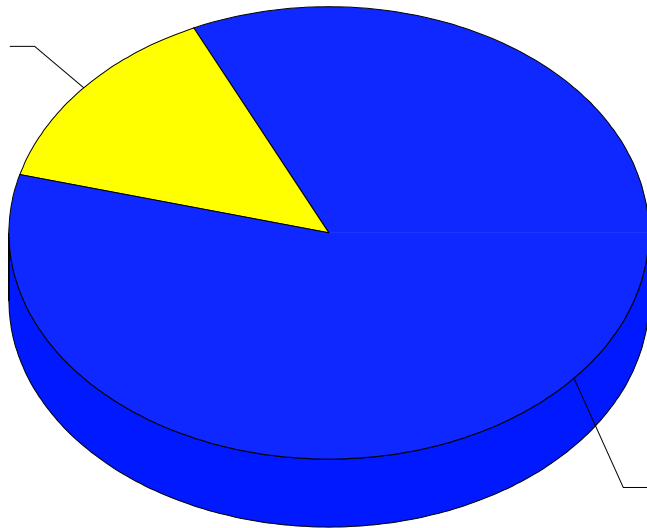
No
59%

Base: Access the Internet

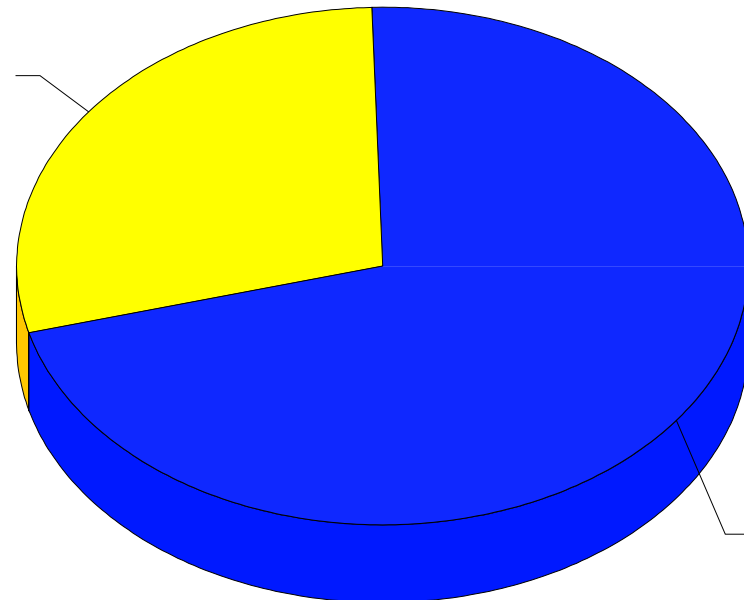
Have you ever used your computer to make or "burn" your own CDs?



Yes
14%



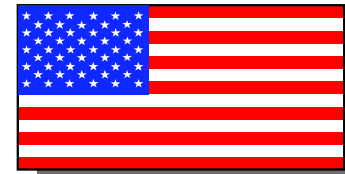
Yes
29%



No
71%

Base: Have downloaded music from the Internet

5.5% of 16-40 year olds are actively downloading *but not buying* music

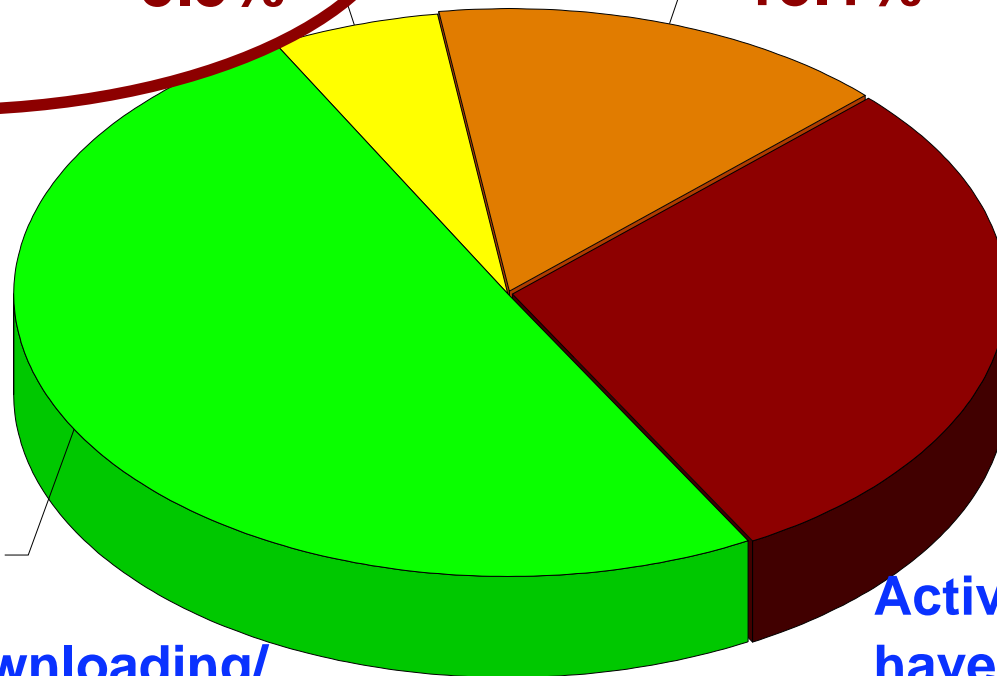


Actively downloading/
have NOT purchased CD
or cassette in last 12 months

5.5%

Neither downloaded
nor purchased CD
or cassette in last 12 months

15.1%



50.3%

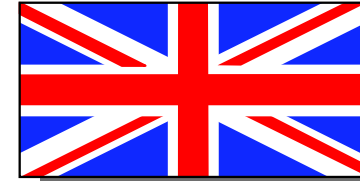
Not actively downloading/
purchased CD
or cassette in last 12 months

29.1%

Actively downloading/
have purchased CD
or cassette in last
12 months

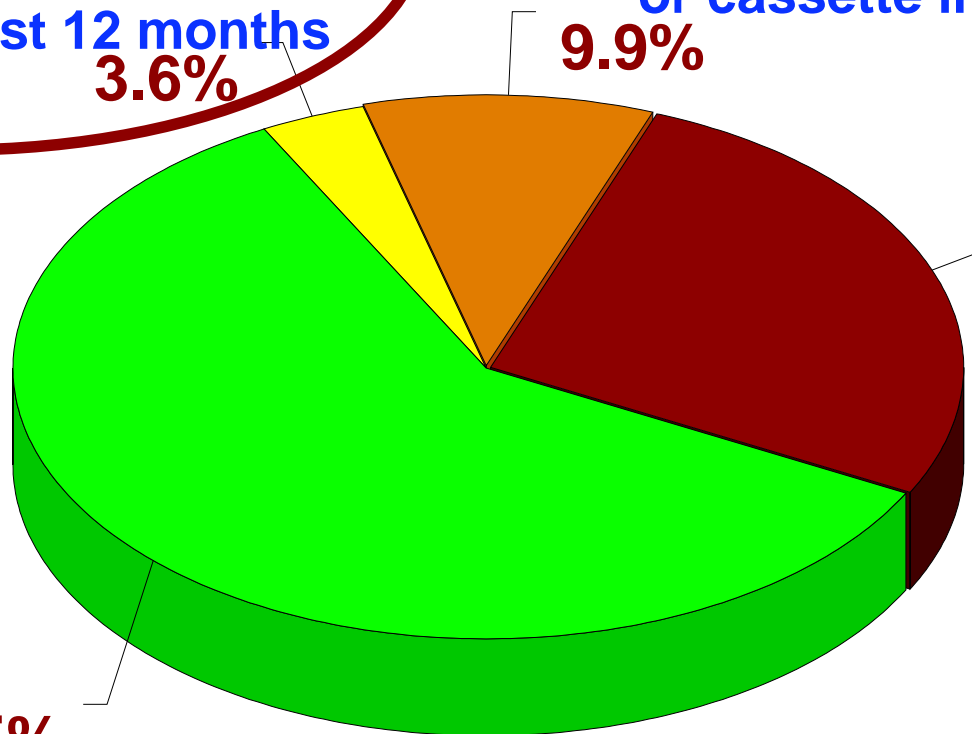


3.6% of 15-44 year olds are actively downloading *but not buying* music



Actively downloading/
have NOT purchased CD
or cassette in last 12 months
3.6%

Neither downloaded
nor purchased CD
or cassette in last 12 months
9.9%



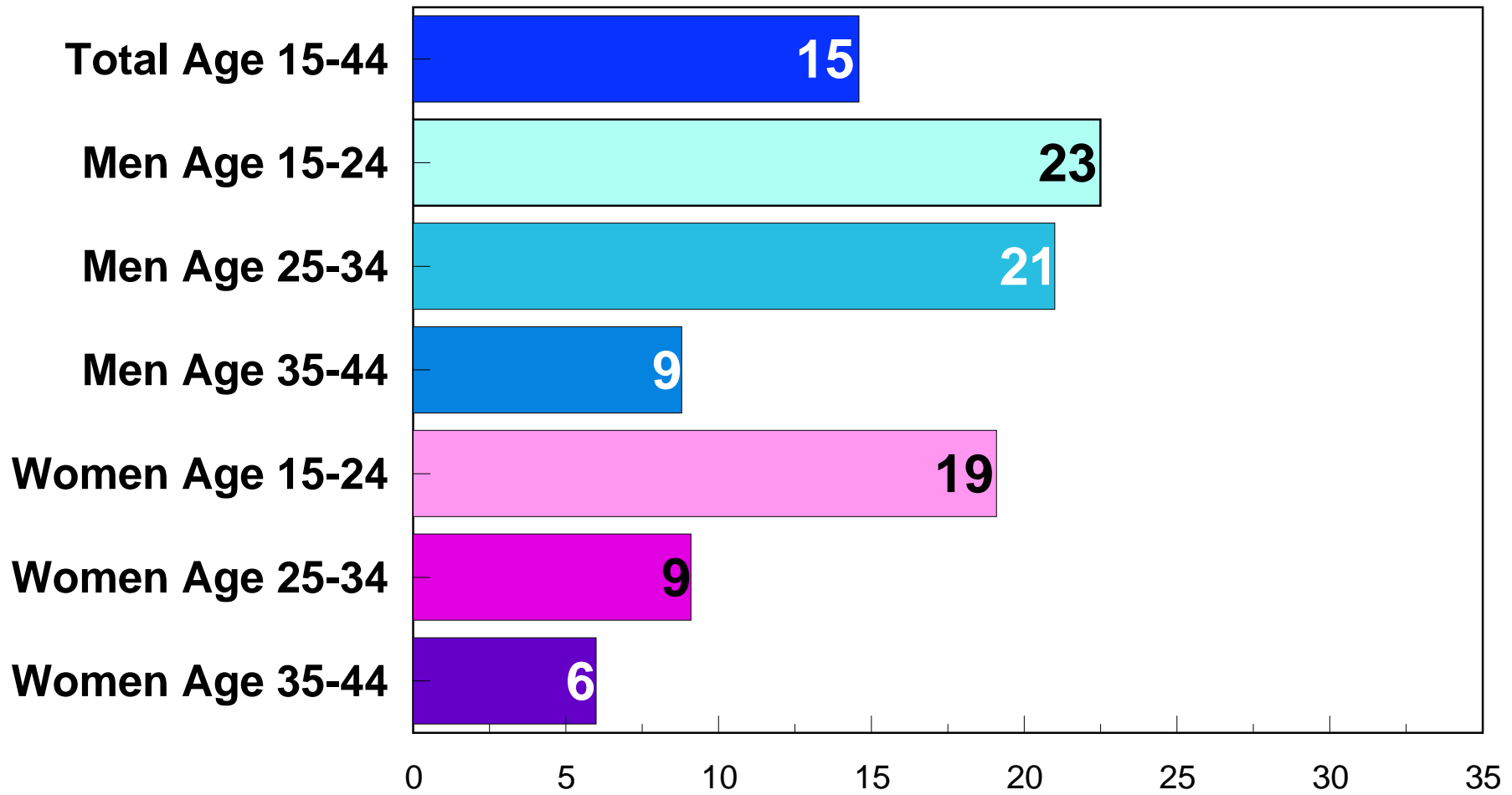
26.9%

Actively downloading/
have purchased CD
or cassette in last
12 months

59.5%

Not actively downloading/
purchased CD
or cassette in last 12 months

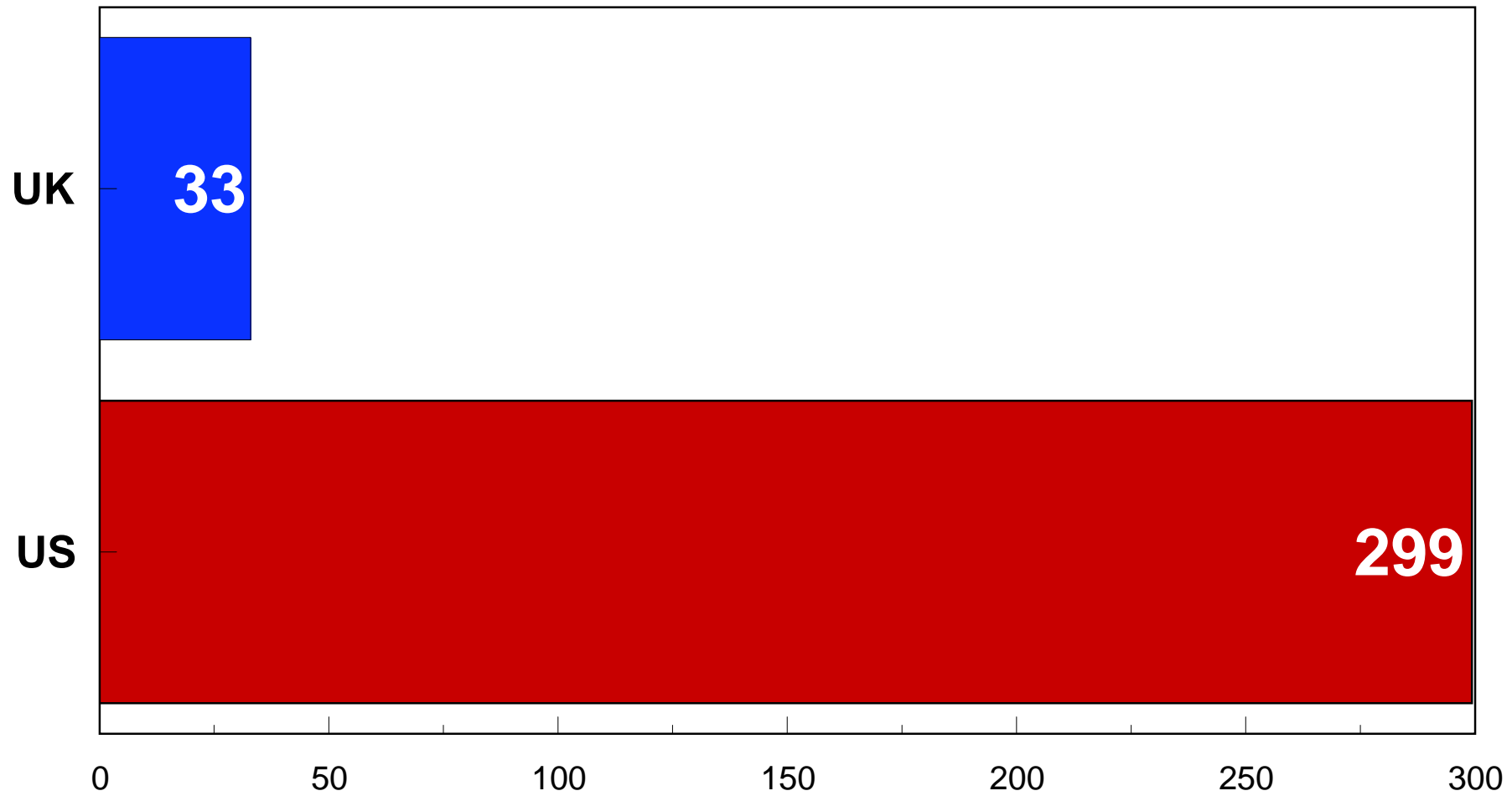
"You don't need to buy CDs or tapes as you can get the music free from the Internet"



% agreeing with statement

Base: Purchased music albums or tapes in the last 12 months

About how many songs have you downloaded for sites such as Napster and Gnutella?



average number of songs downloaded

Base: Have downloaded music from the Internet

music week



edison media research

AR-UK

ABSOLUTE RADIO UK

create - enhance - realise



NOP World

United Business Media