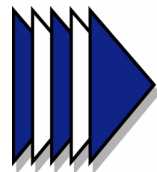


The Ratings Picture of Leading Country Radio Stations

A Special Study
by Research Director Inc.



Research Director Inc.

the ratings experts SM

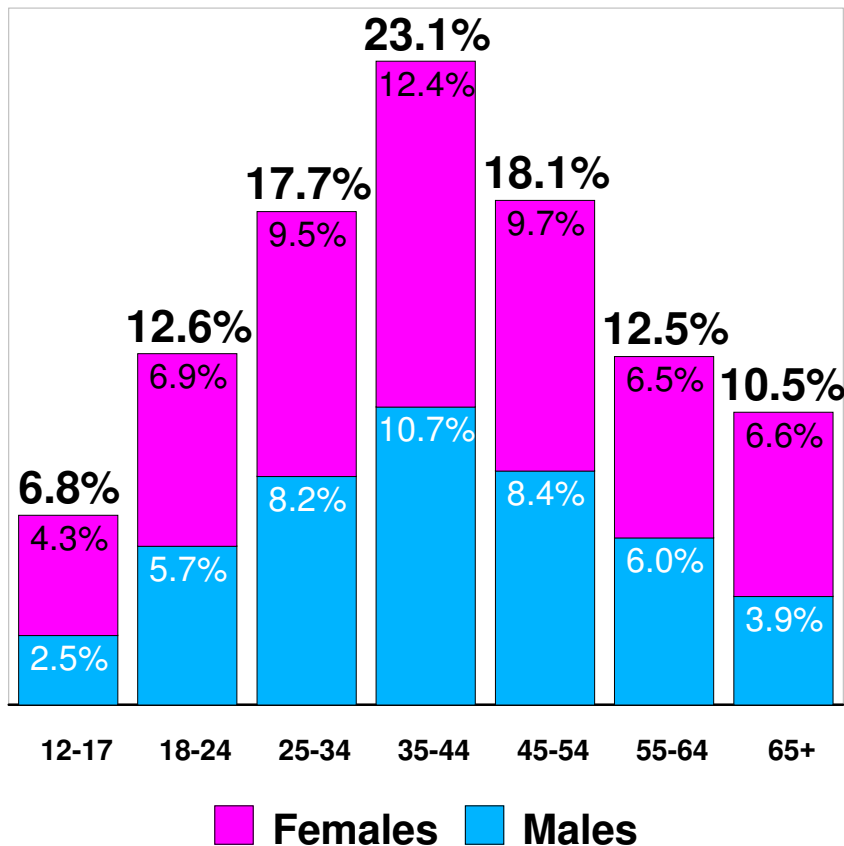
914 Bay Ridge Road Annapolis Maryland 21403
410-974-8101 www.ResearchDirectorInc.com

Leading Country Radio Stations

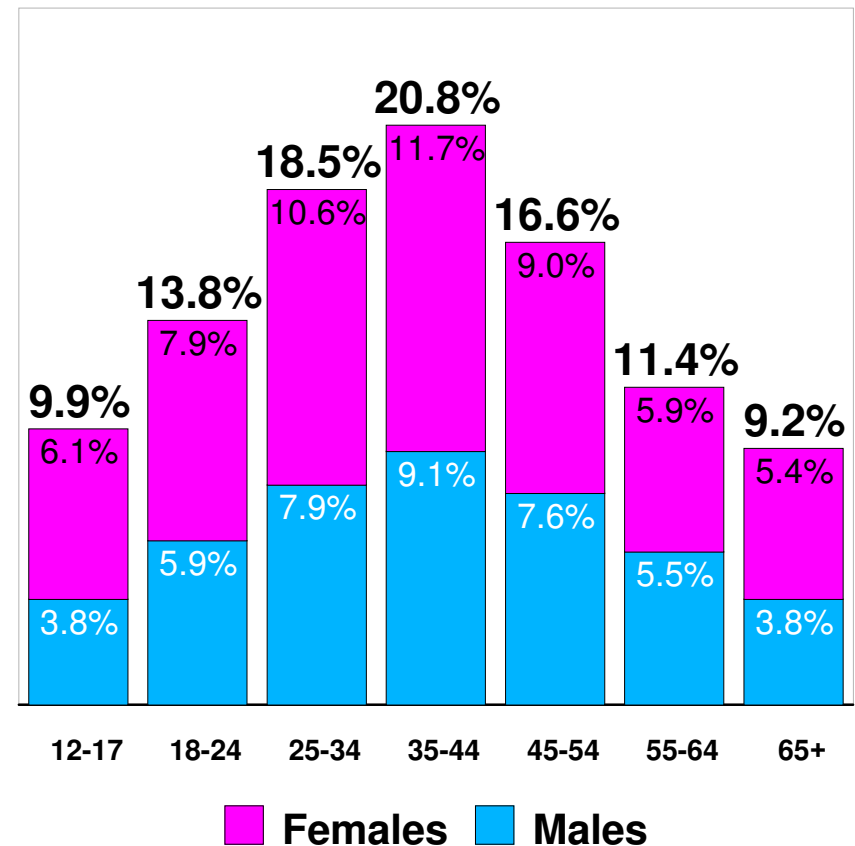
- This study may be downloaded via Adobe and may be used with attribution to Research Director Inc.. and The Arbitron Company
- Note: The data shown in this study are an average of leading country radio stations in Arbitron measured markets. The interpretation of this information should reflect that this composite picture includes only market ratings leaders. See *About This Study* at the end of the presentation for more details.
- The download is 15 pages.

The largest percentage of the country radio audience is in the prime demo of Persons 35-44

AQH Composition
Mon-Sun 6a-12m

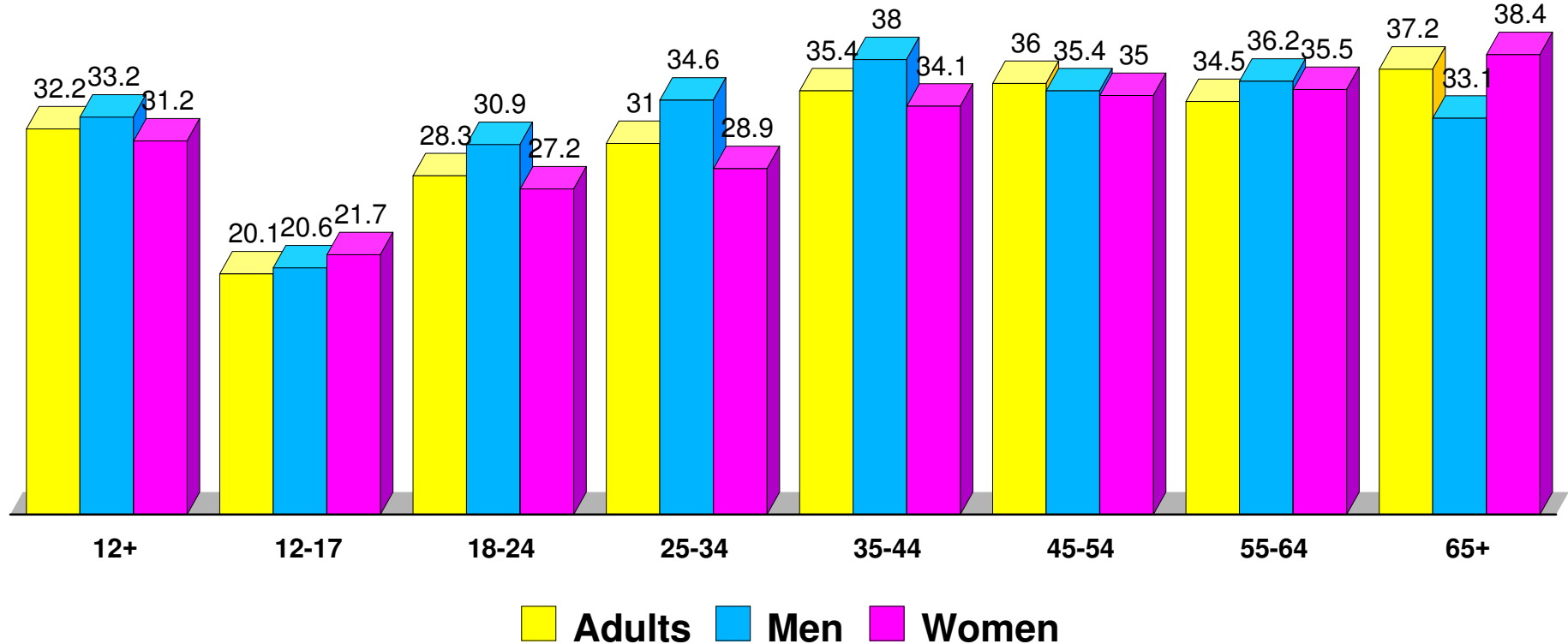


Cume Composition
Mon-Sun 6a-12m



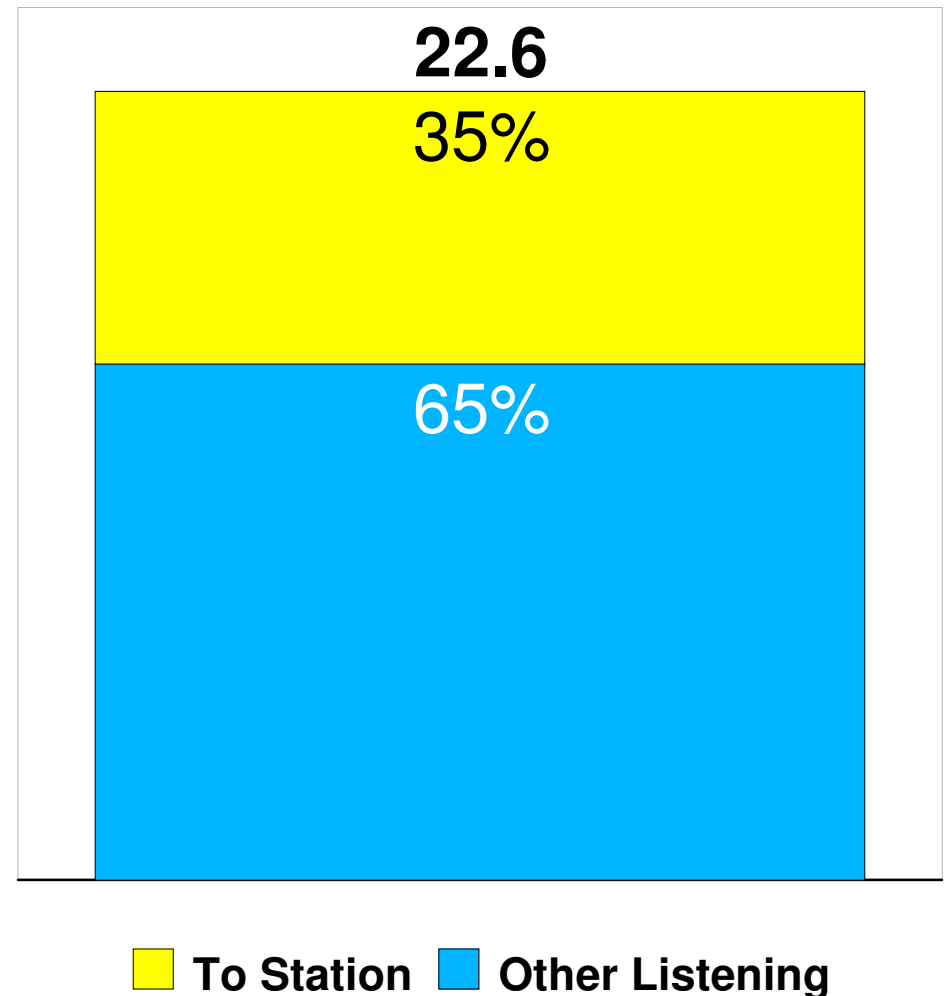
Time spent listening to Country Radio Stations increases with age

Time Spent Listening to Country Stations



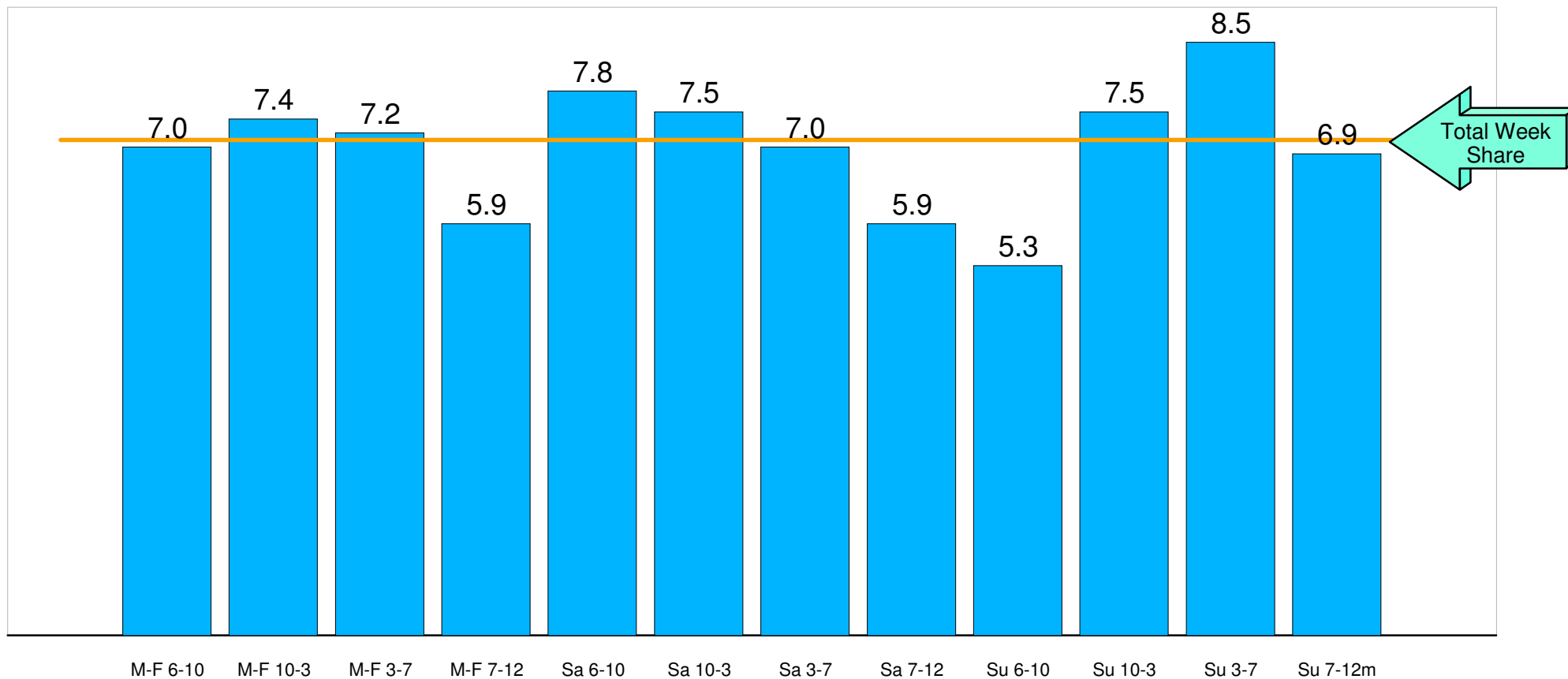
The average Country Radio Listener spends more than one-third of their radio listening time with their favorite Country Radio Station

- The average Country Radio Listener spends an impressive 22.6 hours per week listening to the radio
- And, spends 35% of that time with a single country radio station.



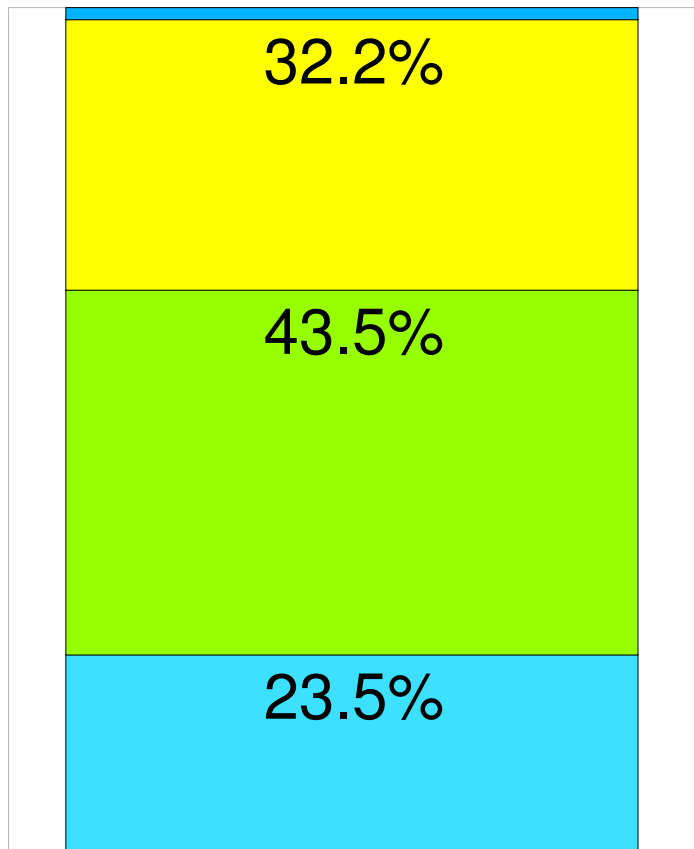
Country Radio Stations exceed their total week's share in most key sales dayparts

Daypart Performance Adults 25-54 AQH Share



32% of Country Radio listening is done at-work

AQH Listening Location Composition
Mon-Sun 6a-12m



- Other
- At Work
- In Car
- At Home

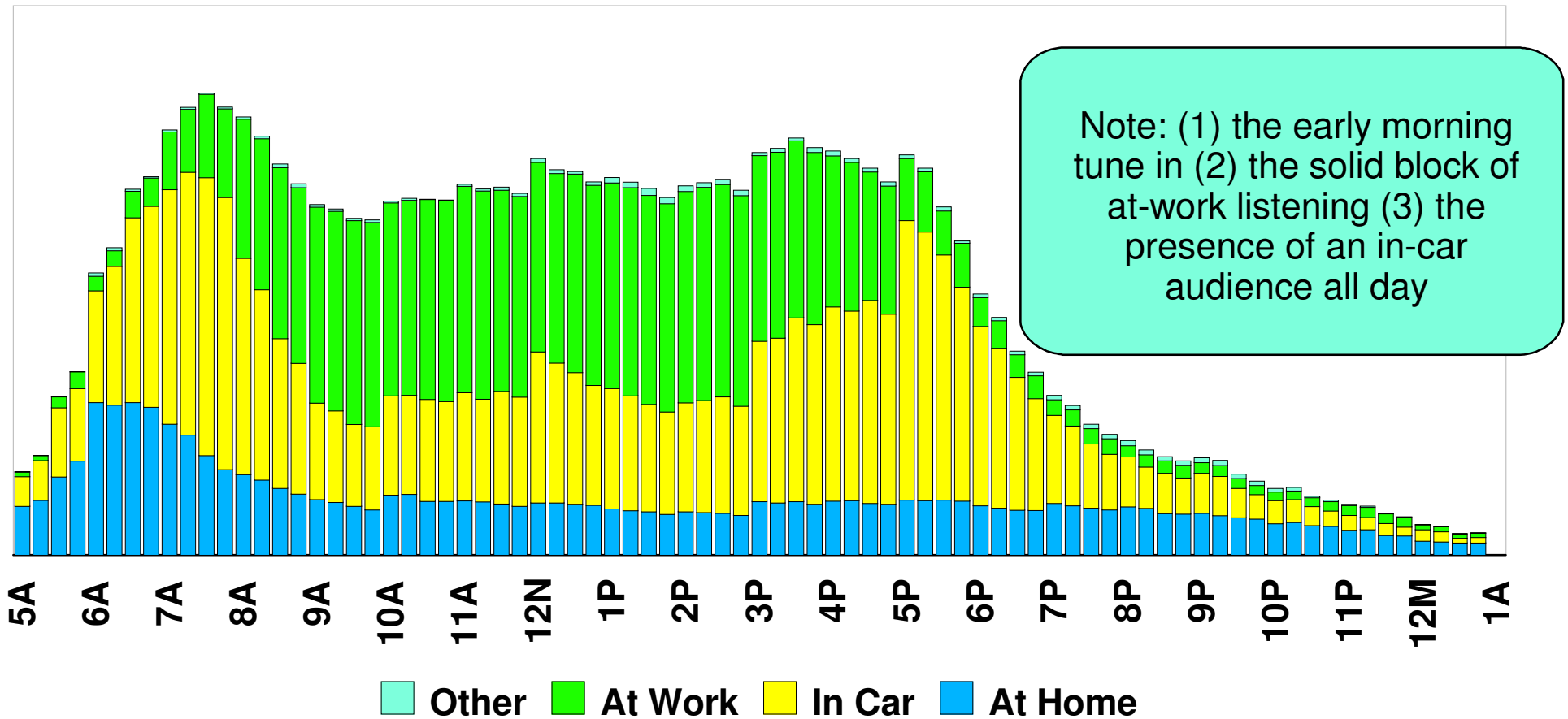
	<u>At-Home</u>	<u>In Car</u>	<u>At Work</u>	<u>Other</u>
Cume %	37.8	84.2	18.9	4.3
TSL Hrs	21.0	17.3	57.7	11.2

↑

Note the very high percentage [84.2%] of the total week's cume that listens in a car.

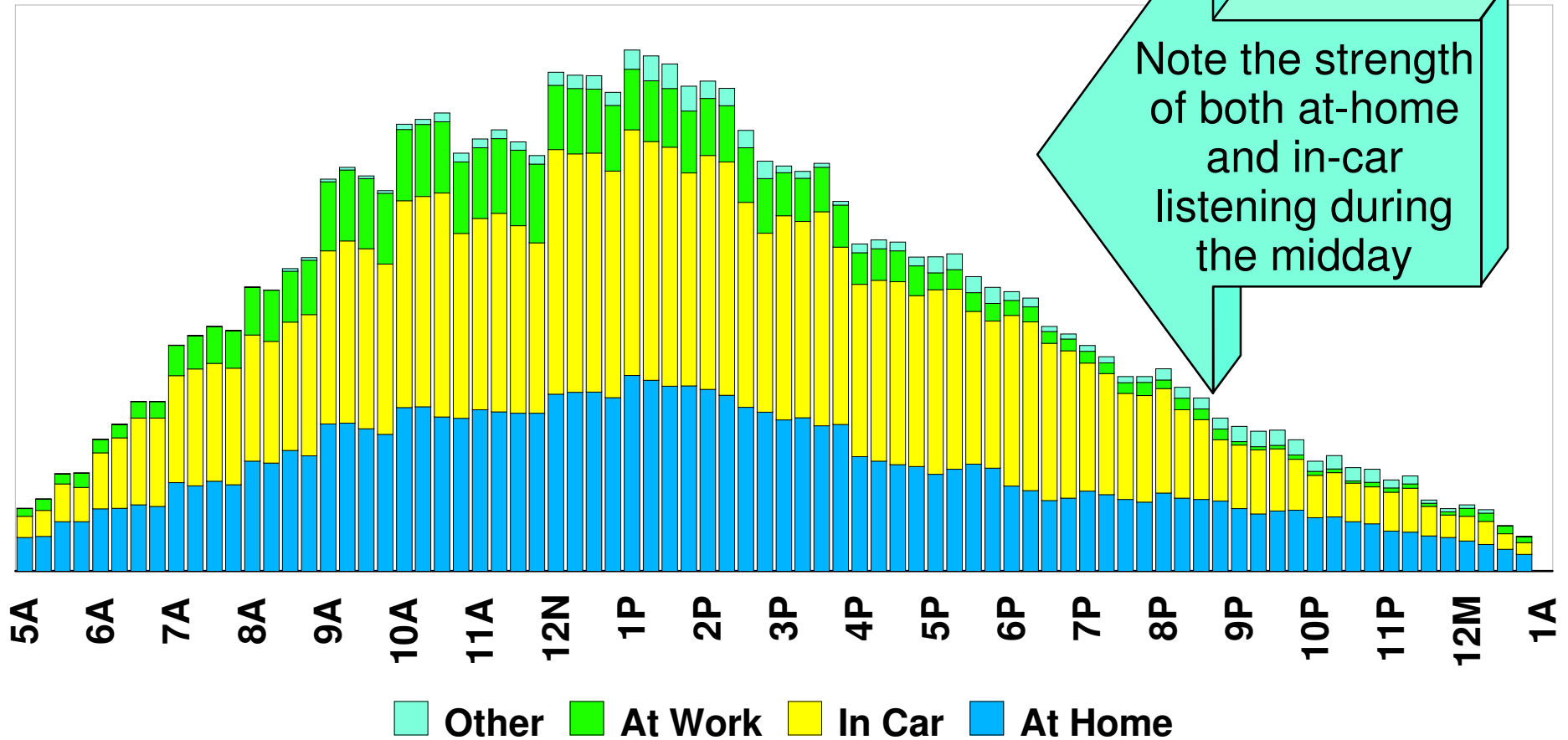
Audience Flow by Quarter-hour, Mon-Fri

Adults 25-54 Mon-Fri



Audience Flow by Quarter-hour, Sat.

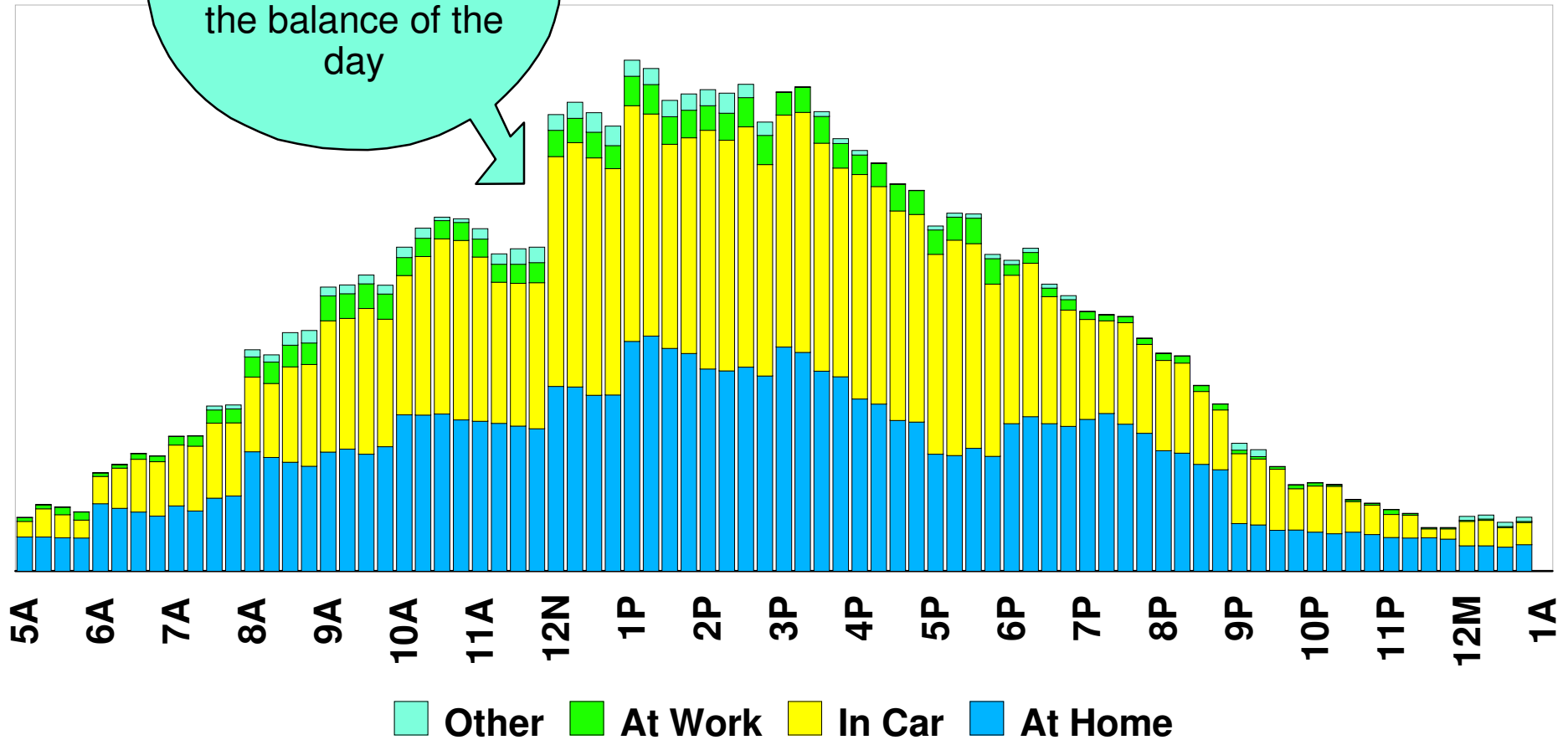
Adults 25-54 Sat



Audience Flow by Quarter-hour, Sunday

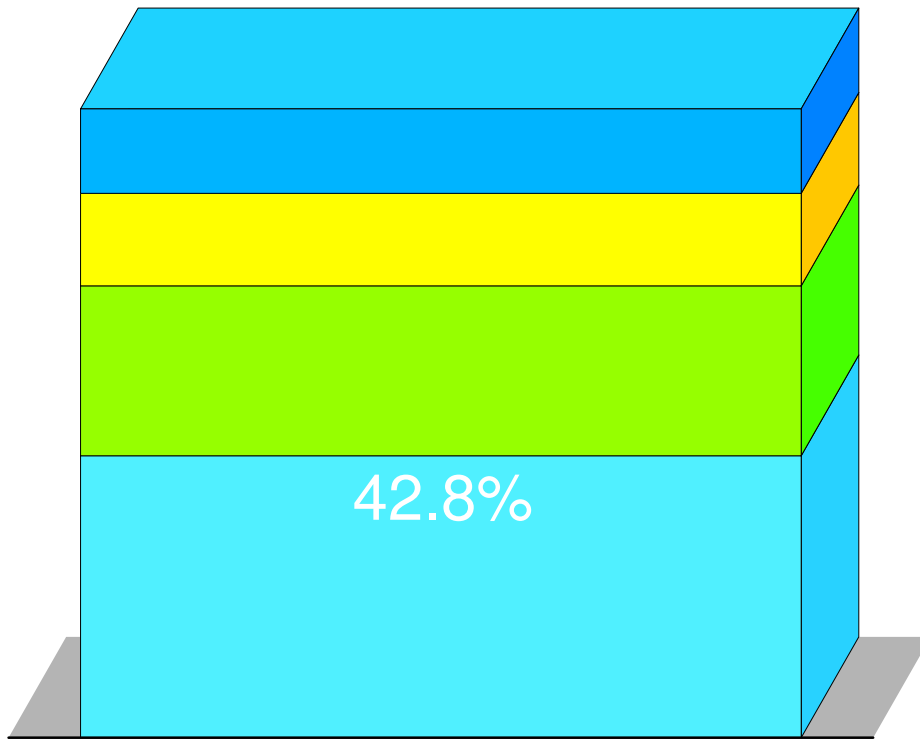
Note the tune-in at noon plus the strength through the balance of the day

Adults 25-54 Sun



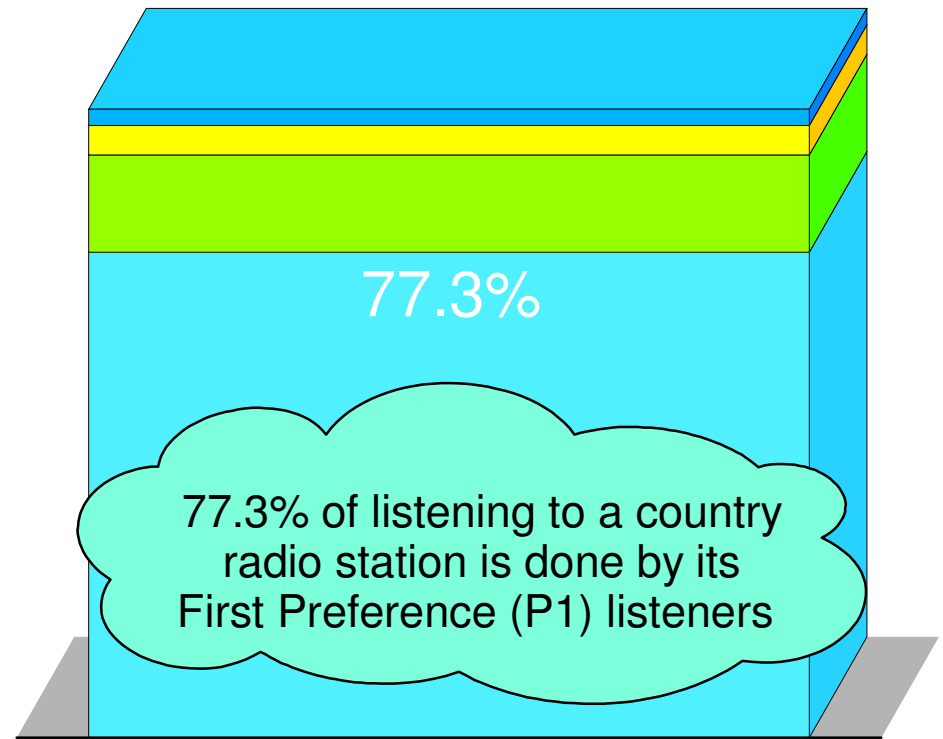
The Country Radio Listener is station loyal

Cume Composition
Persons 12+



■ P4+ ■ P3 ■ P2 ■ P1

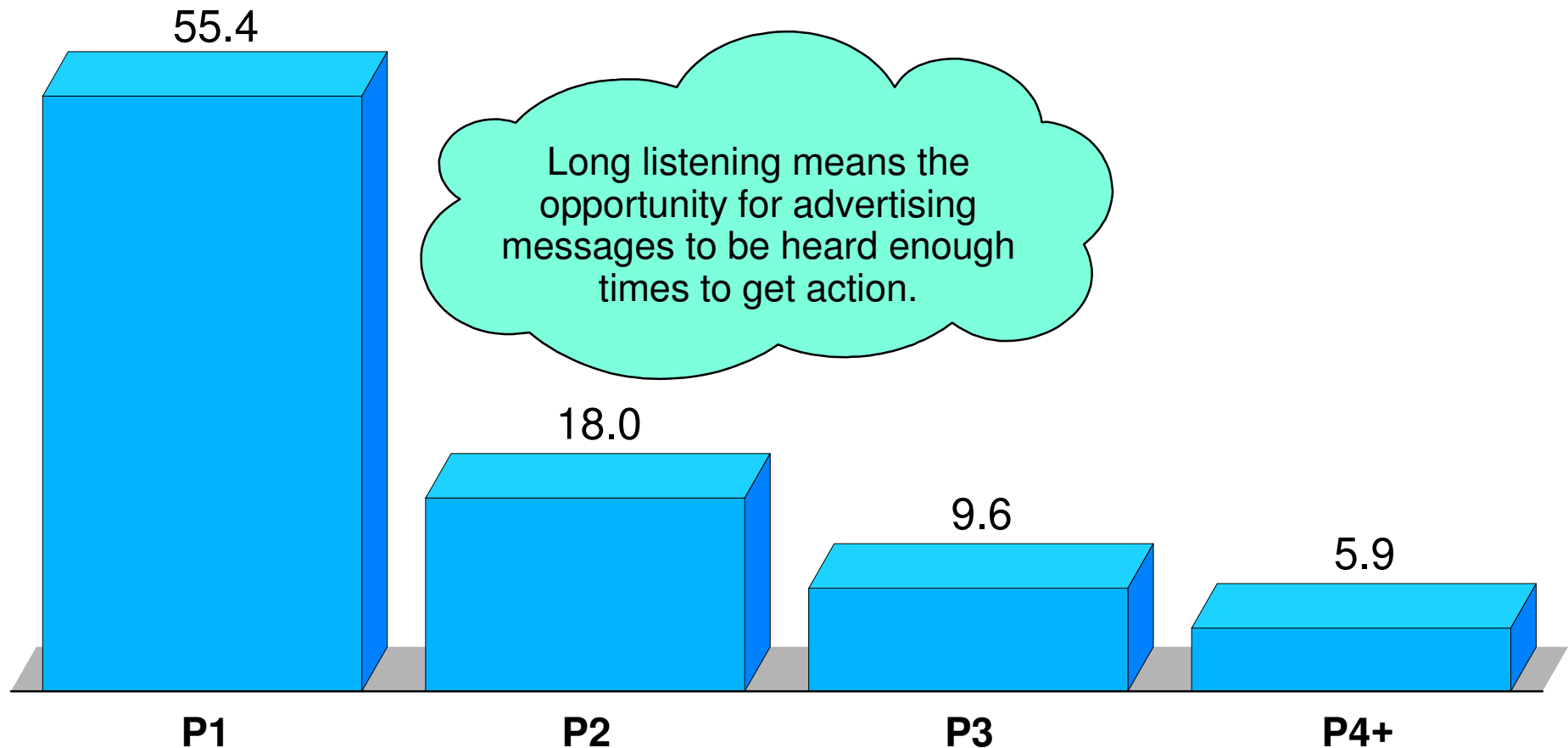
AQH Composition
Persons 12+



■ P4+ ■ P3 ■ P2 ■ P1

First Preference Country Radio Listeners spend over 55 quarter-hours per week with the station

Persons 12+ TSL Mon-Sun 6a-12m



A high percentage of Recycling between dayparts is a mark of excellence for Country Radio Stations

Percent of Daypart Cume Persons 25-54

	<u>M-F 6-10</u>	<u>M-F 10-3</u>	<u>M-F 3-7</u>	<u>M-F 7-12</u>	<u>S-S 6-12</u>
M-F 6-10	100.0%	67.6%	66.6%	63.7%	58.3%
M-F 10-3	60.3%	100.0%	60.3%	58.7%	51.3%
M-F 3-7	72.5%	73.9%	100.0%	76.3%	63.6%
M-F 7-12	31.3%	32.4%	34.4%	100.0%	33.9%
S-S 6-12	56.7%	56.1%	56.9%	66.9%	100.0%

How to Read:

60.3% of those who listen M-F 6-10AM
in the target demo of Persons 25-54 also
listen M-F 10A-3P.

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About This Study

- Research Director Inc. selected five leading country radio stations based on Persons 12+ share in diverse market sizes and geographic locations. The Arbitron data for each market/ station was processed using the proprietary system developed by Research Director Inc. called Instant Answersm.
- A 4-book average was calculated from Fall 02 through Summer 03. The results of the markets were averaged.
- The information presented in this study does not represent all country radio stations, rather only the selected leading stations. Therefore, users of this study should make comparisons to their own stations with this in mind.
- The audience estimates presented in this study are subject to the same limitations as Arbitron.
- This study is copyrighted by Research Director Inc. and Arbitron holds the copyright on the original audience estimates. This study may be used by Arbitron subscribers with attribution to Research Director Inc. and The Arbitron Company.

