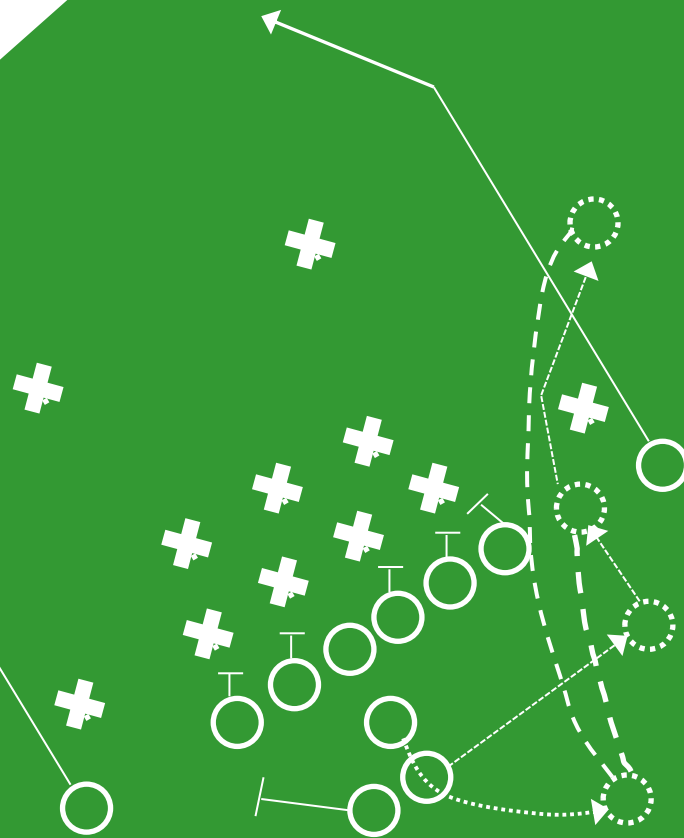


UNDERSTANDING THE SPORTS RADIO LISTENER

A DETAILED STUDY ON THE PLAY-BY-PLAY RADIO LISTENER



RESEARCH DIRECTOR, INC.

- Established in 1993
- Experts at interpreting existing broadcast research
 - Radio Sales
 - Radio Programming
- Help broadcasters get a premium for their listeners
- Involved in 42 Different Radio Markets
 - 26 Different Radio Groups
- Have worked with sports radio stations around the country

- Leading provider of multimedia audience and consumer data in the U.S.
- Most widely used media planning database by agencies and advertisers
- Primary source of consumer targeting info for national brands
- User/Volumetric data on over 500 product categories (6,000+ brands)
- Hundreds of psychographic statements/segments and lifestyle data points

HISTORICALLY –
WHAT MAKES PLAY-BY-PLAY WORTH A PREMIUM

Passion and Emotion



PLAY-BY-PLAY'S DILEMMA IN 2013

Buyers /Advertisers are using Arbitron tools to judge the value of a commercial message on play-by-play.

The local music stations are being placed on a level playing field with play-by-play sports.

Gross Impressions (GIs)

The sum of the Average Quarter-Hour Persons audience for all spots in a given schedule.

$$[\text{AQH Persons}] \times [\text{the number of spots in an advertising schedule}] = \text{GIs}$$

Gross Rating Points (GRPs)

The sum of all rating points achieved for a particular spot schedule.

$$[\text{AQH Rating}] \times [\text{the number of spots in an advertising schedule}] = \text{GRPs}$$



A GRP has never bought a damn thing in its life. If an advertiser's goal is to move their product or service, they cannot look solely at GRPs!

WHY SHOULD PLAY-BY-PLAY BE JUDGED DIFFERENTLY?

- Appointment Listening
- Forefront sound means true listening
- Unmatched goodwill
- Delivery of a highly desirable consumer group

WHY SHOULD PLAY-BY-PLAY BE JUDGED DIFFERENTLY?

- Appointment Listening
- Forefront sound means true listening
- Unmatched goodwill
- **Delivery of a highly desirable consumer group**

DELIVERY OF A HIGHLY DESIRABLE CONSUMER GROUP

Few will argue with this fact.

However...

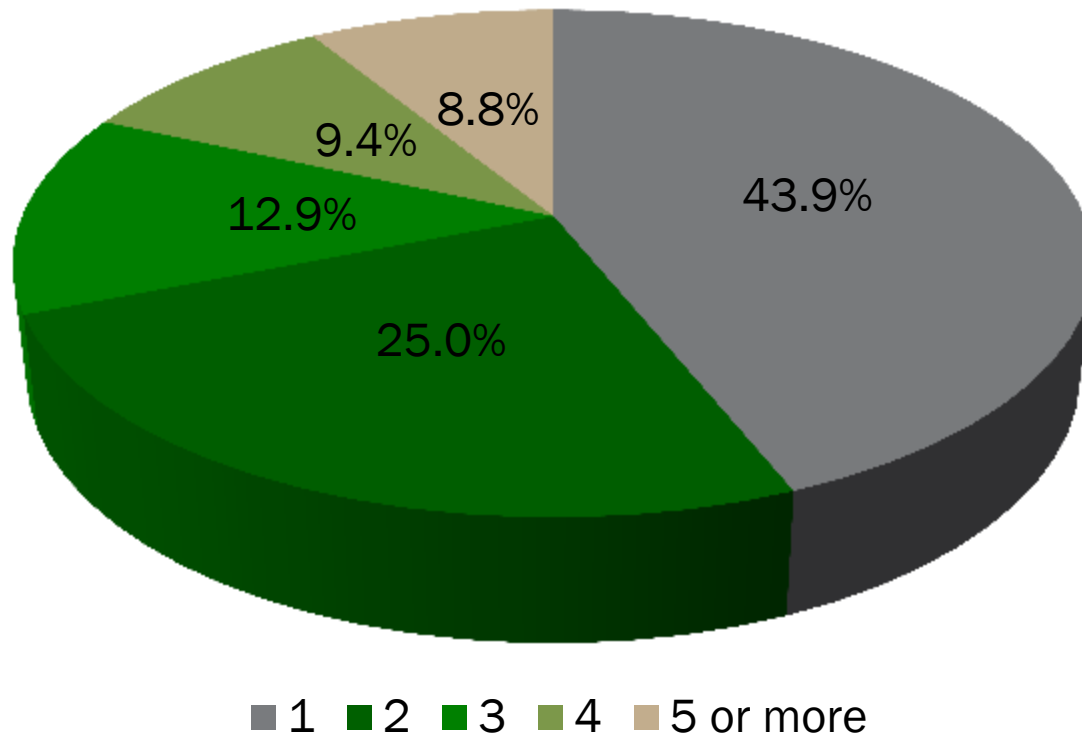
**...it will be beneficial for broadcasters
to quantify this advantage.**

THE STUDY

- Research Director, Inc., in conjunction with GfK MRI, have quantified the demographic, socioeconomic, and psychographic qualities of the play-by-play radio listener
- Nine different sport categories:
 - Any play-by-play
 - Pro Baseball
 - Pro Football
 - Pro Basketball
 - Pro Hockey
 - NASCAR/Auto Racing
 - College Football
 - College Basketball
 - High School Sports

EACH SPORT DELIVERS A DIFFERENT AND UNIQUE AUDIENCE

Number of Different Sports Listened to on the Radio



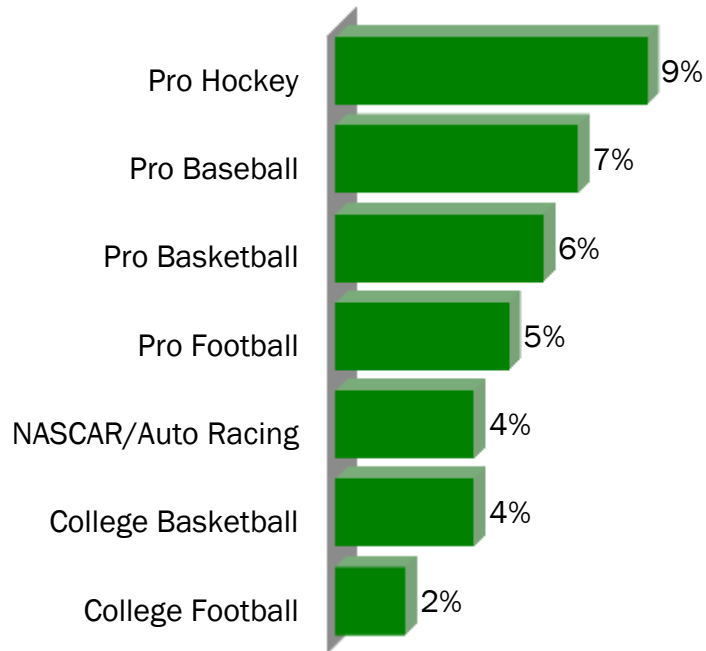
AGE COMPOSITION

Adults 18+ Age Composition

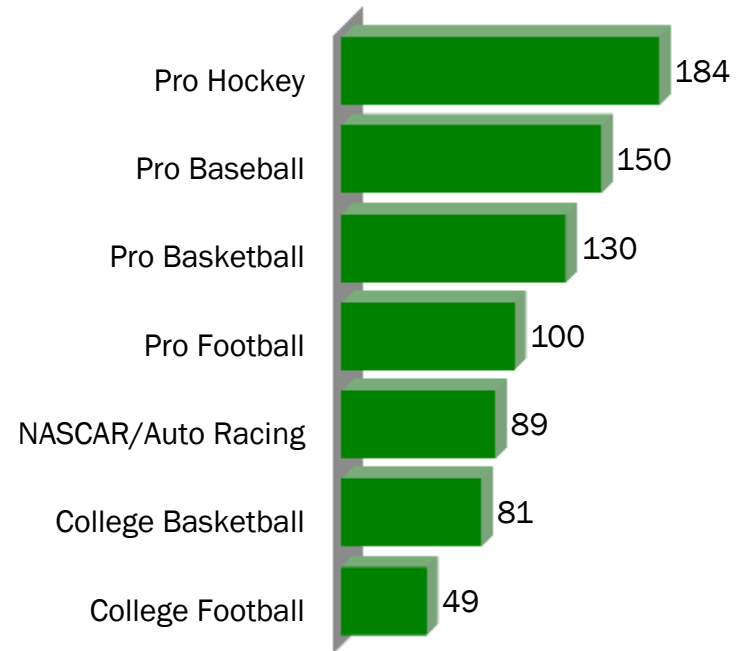
Sport	18-24	25-34	35-44	45-54	55-64	65+
Pro Baseball	9%	17%	19%	24%	19%	12%
Pro Football	12%	21%	21%	23%	15%	8%
Pro Basketball	17%	21%	20%	20%	13%	9%
Pro Hockey	18%	19%	21%	22%	14%	7%
NASCAR/Auto Racing	12%	15%	23%	22%	16%	11%
College Football	11%	19%	20%	22%	18%	11%
College Basketball	12%	17%	21%	20%	16%	13%
High School Sports	14%	17%	18%	23%	17%	11%

MARKETING REGION NEW ENGLAND

Adults 18+ Composition



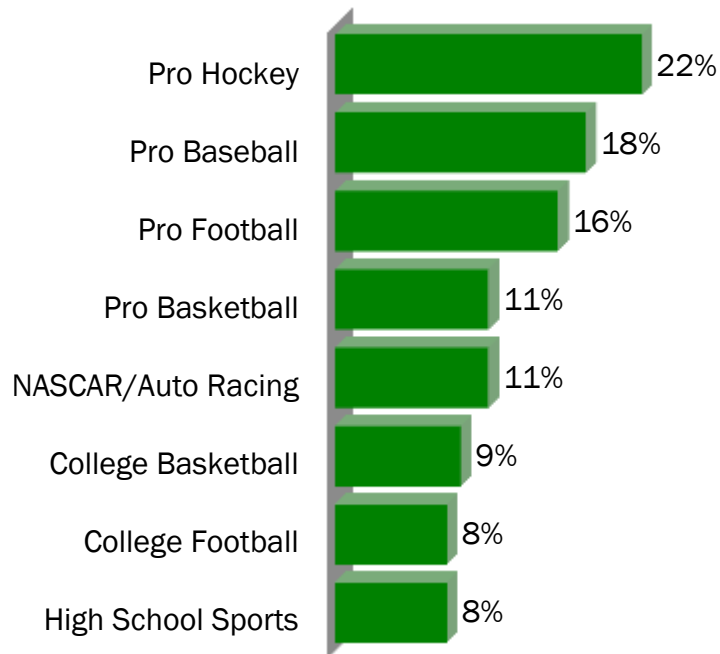
Adults 18+ Index



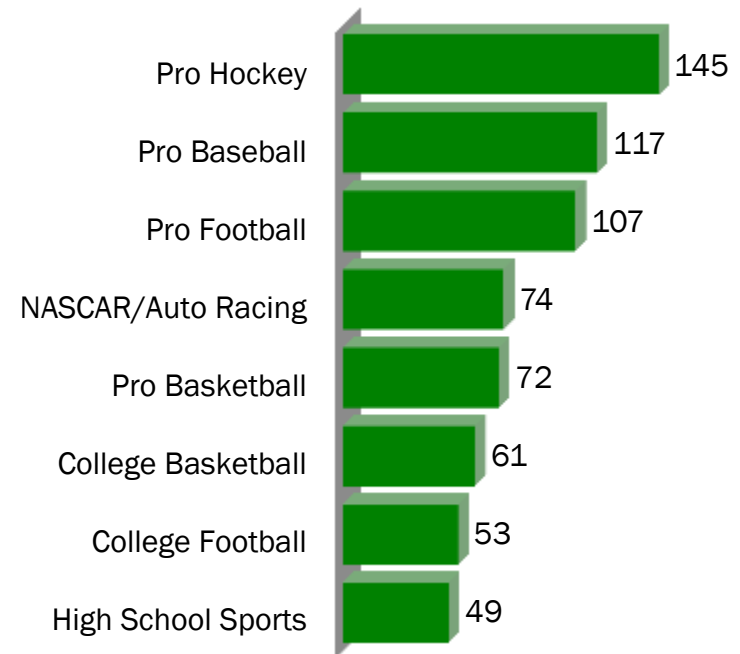
MARKETING REGION

MID-ATLANTIC

Adults 18+ Composition

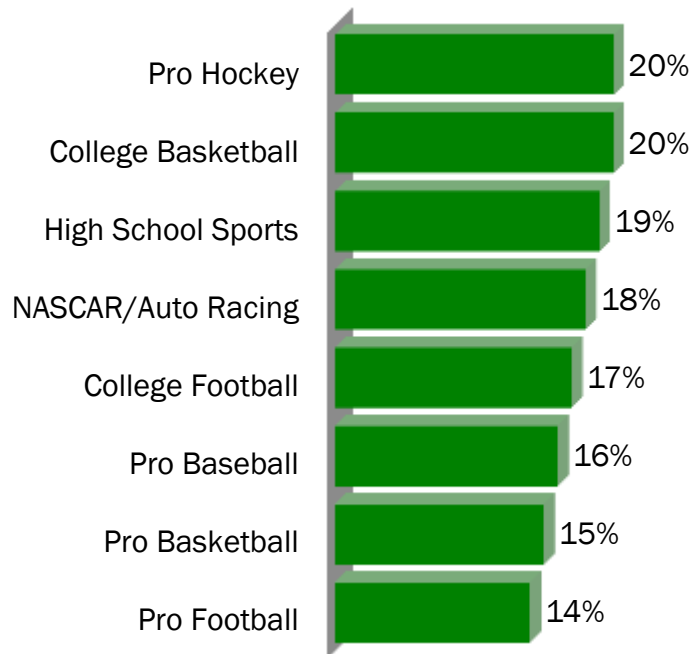


Adults 18+ Index

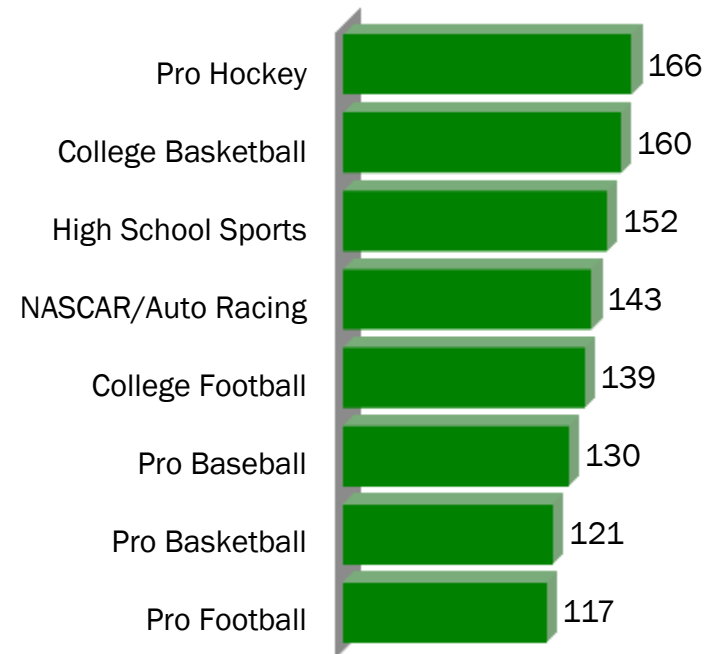


MARKETING REGION EAST CENTRAL

Adults 18+ Composition

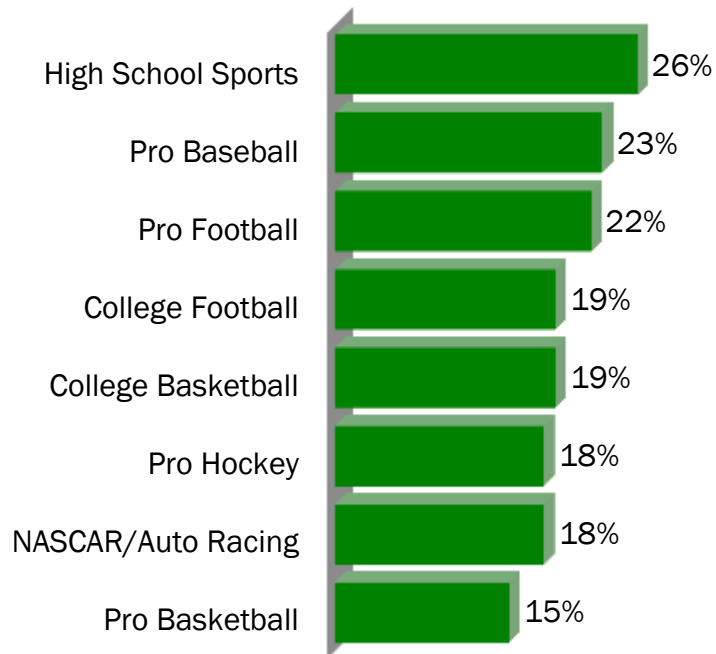


Adults 18+ Index

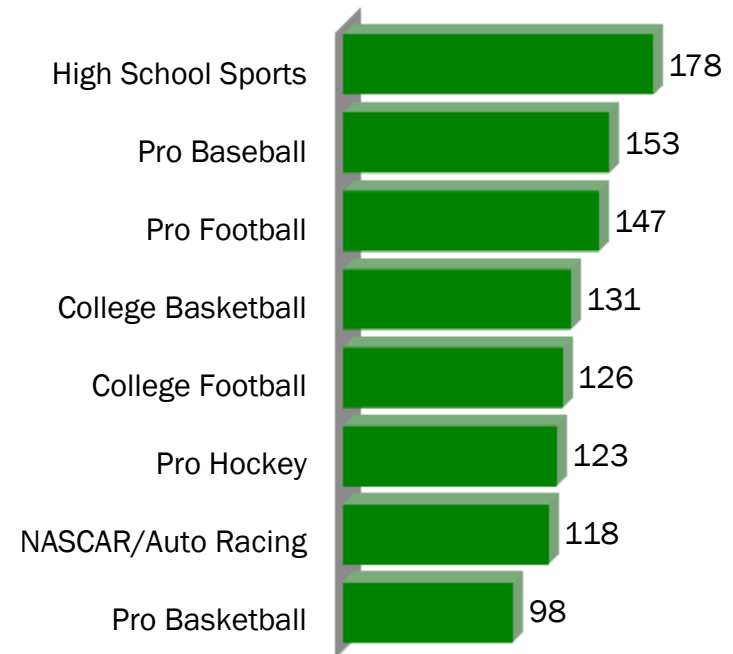


MARKETING REGION WEST CENTRAL

Adults 18+ Composition

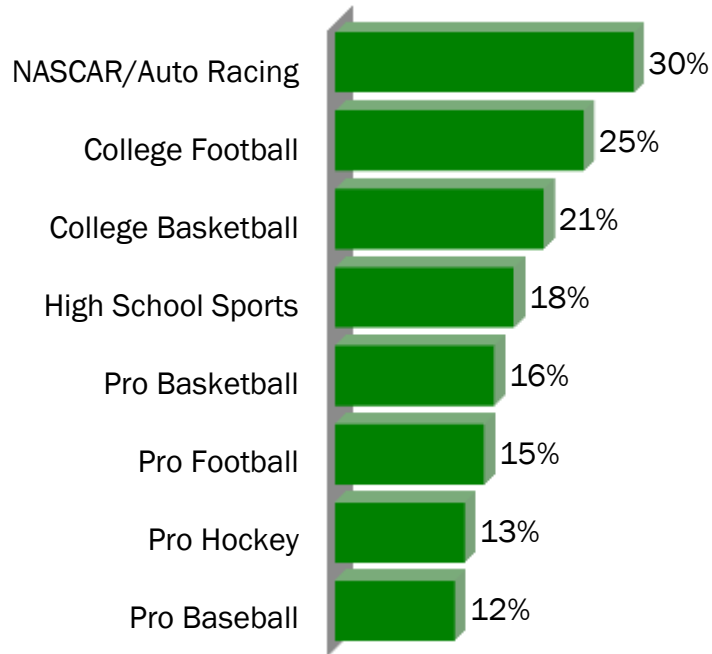


Adults 18+ Index

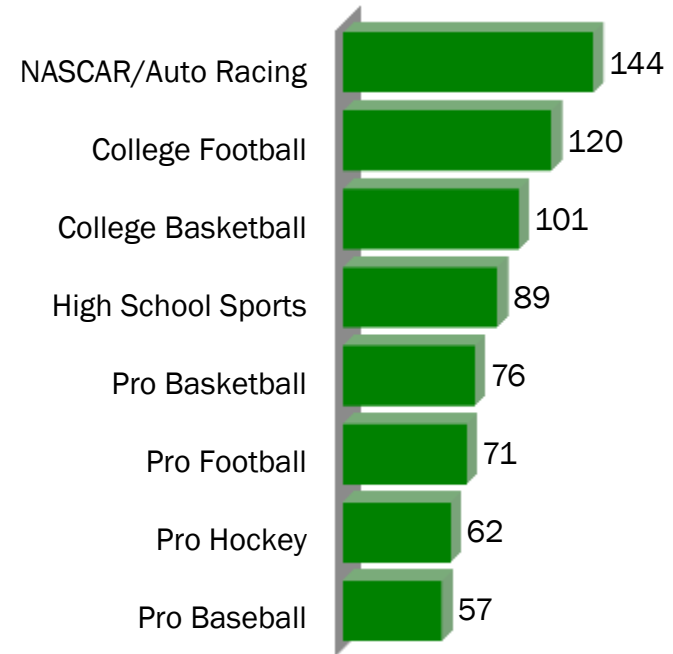


MARKETING REGION SOUTHEAST

Adults 18+ Composition

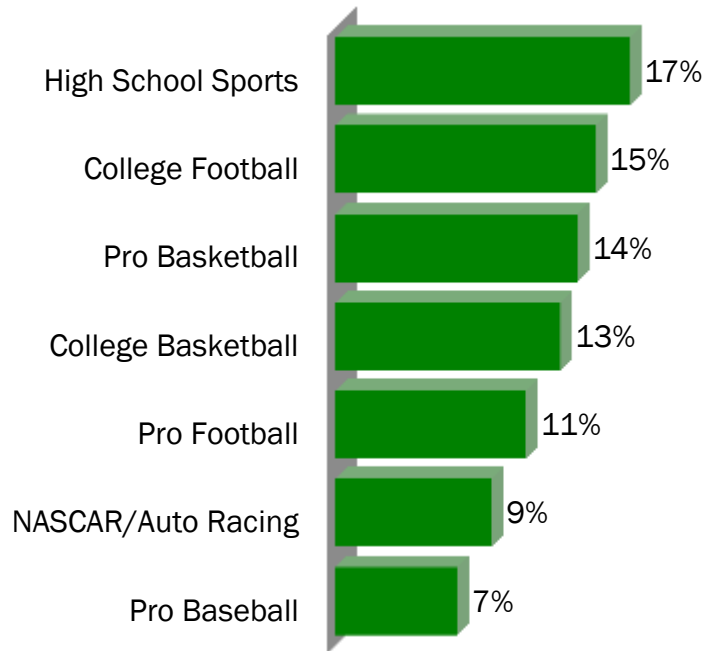


Adults 18+ Index

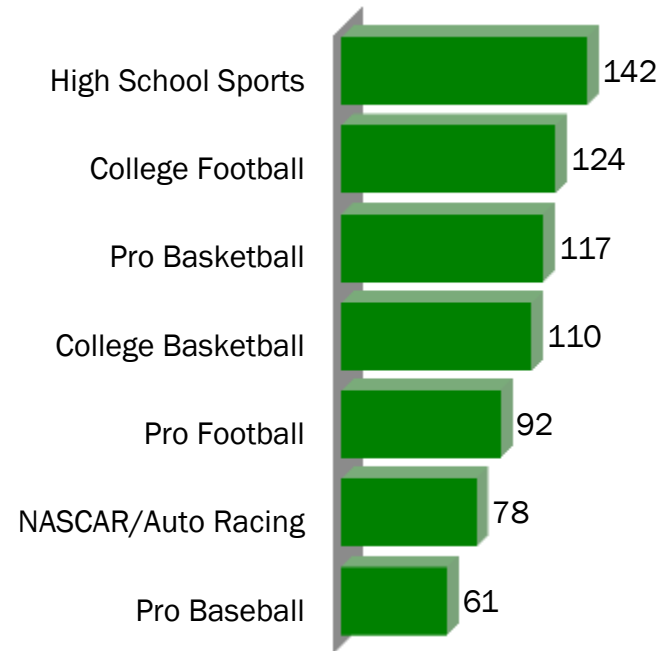


MARKETING REGION SOUTHWEST

Adults 18+ Composition

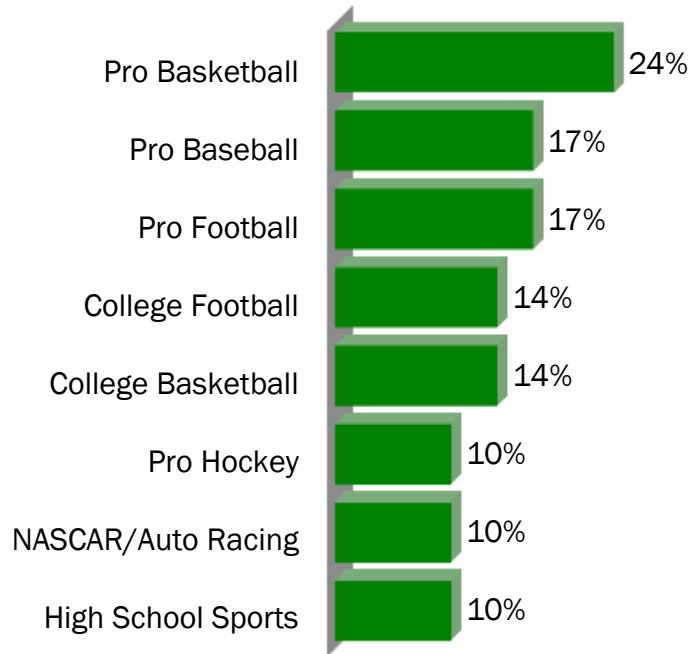


Adults 18+ Index

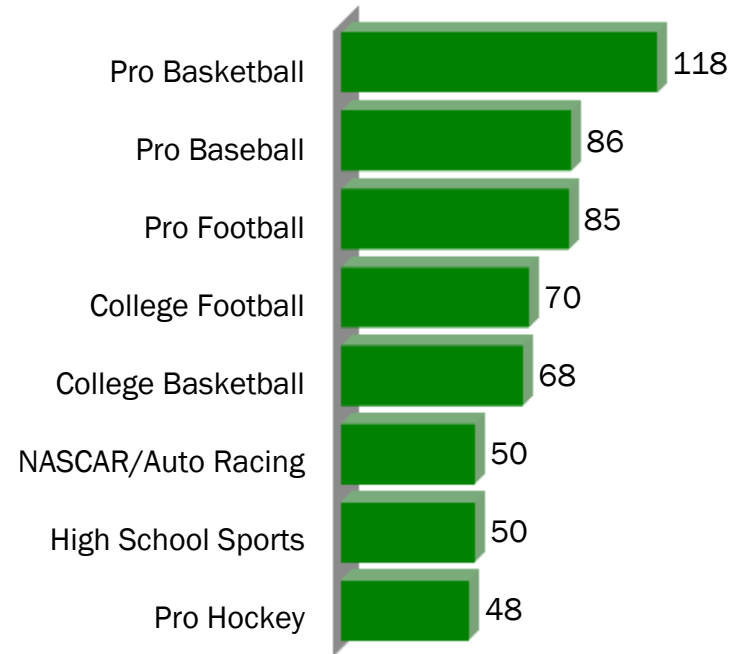


MARKETING REGION PACIFIC

Adults 18+ Composition

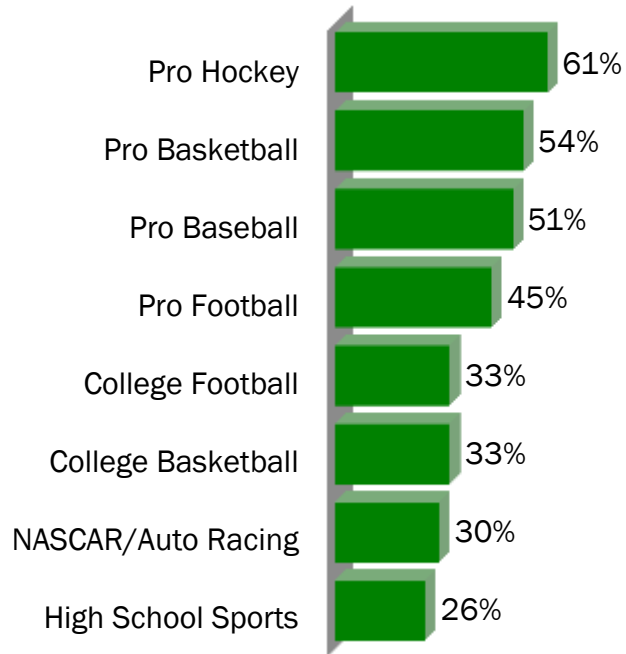


Adults 18+ Index

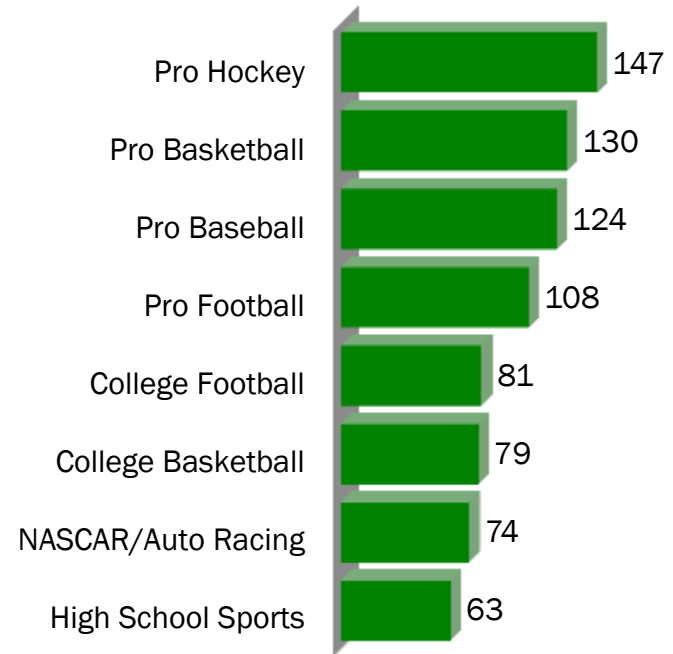


COUNTY SIZE A (LARGEST)

Adults 18+ Composition

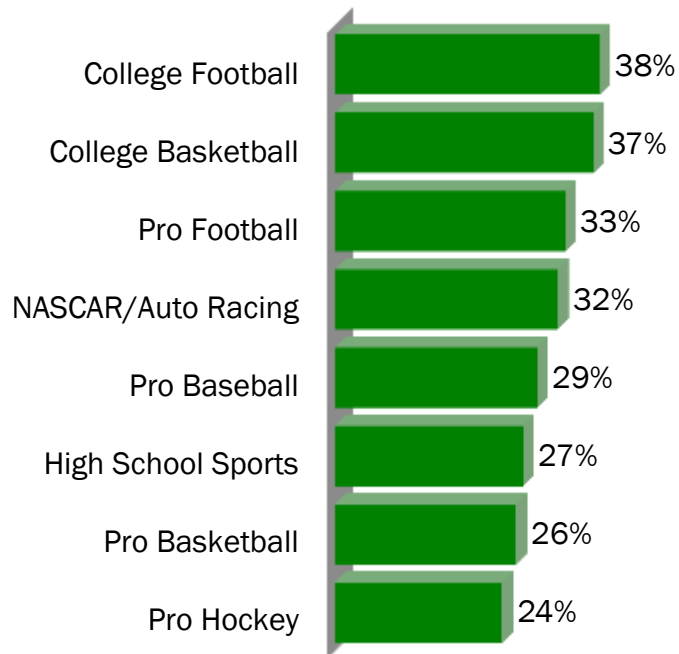


Adults 18+ Index

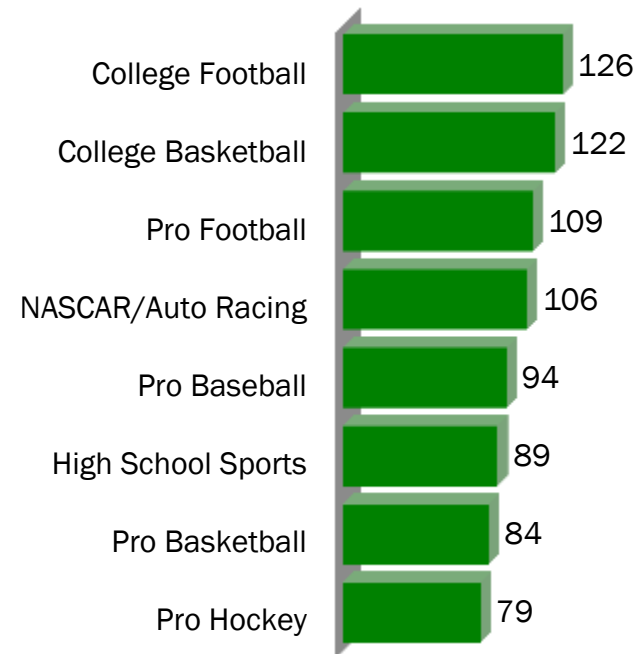


COUNTY SIZE B (SECOND LARGEST)

Adults 18+ Composition

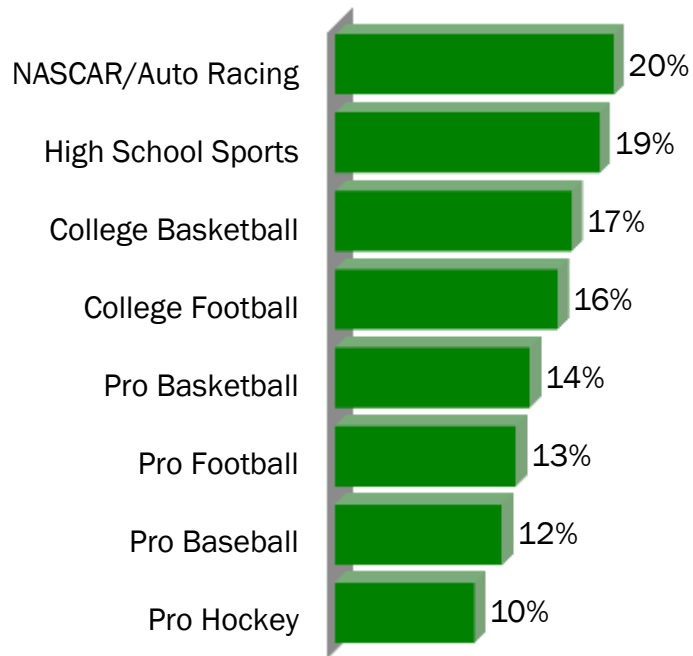


Adults 18+ Index

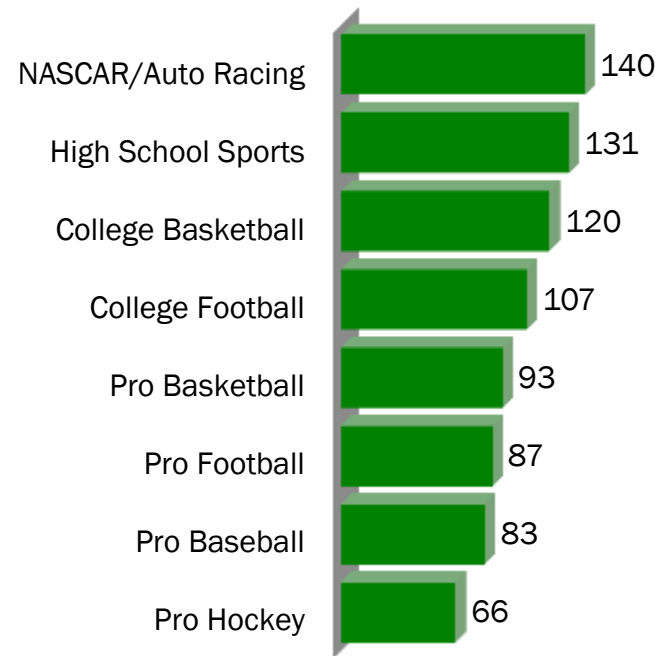


COUNTY SIZE C (SECOND SMALLEST)

Adults 18+ Composition

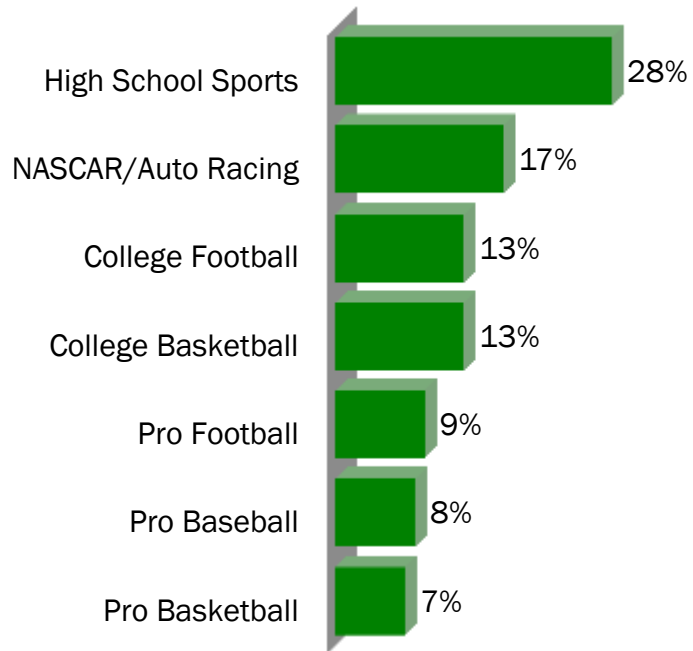


Adults 18+ Index

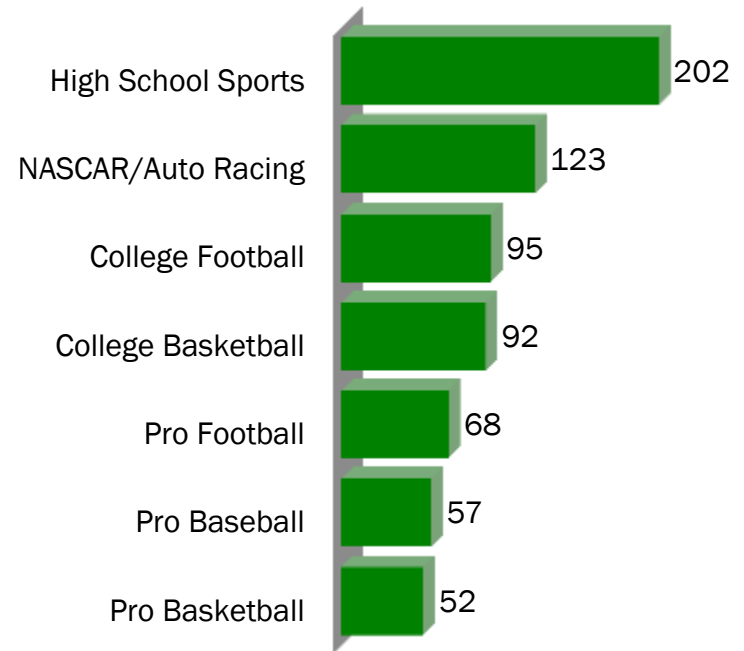


COUNTY SIZE D (SMALLEST)

Adults 18+ Composition

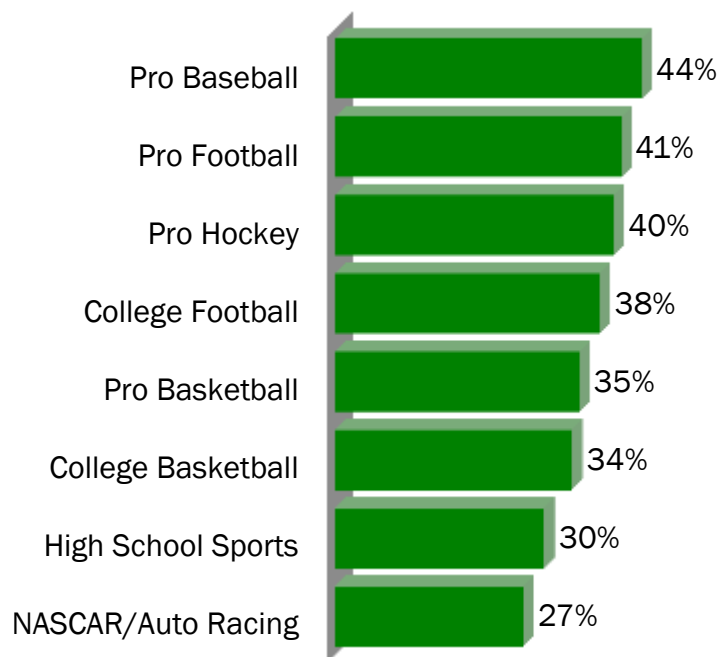


Adults 18+ Index

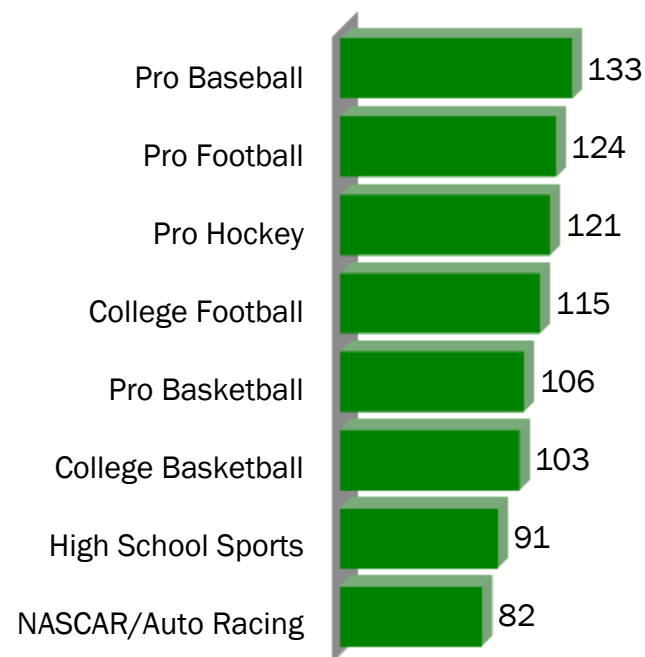


HOME VALUE \$200,000+

Adults 18+ Composition

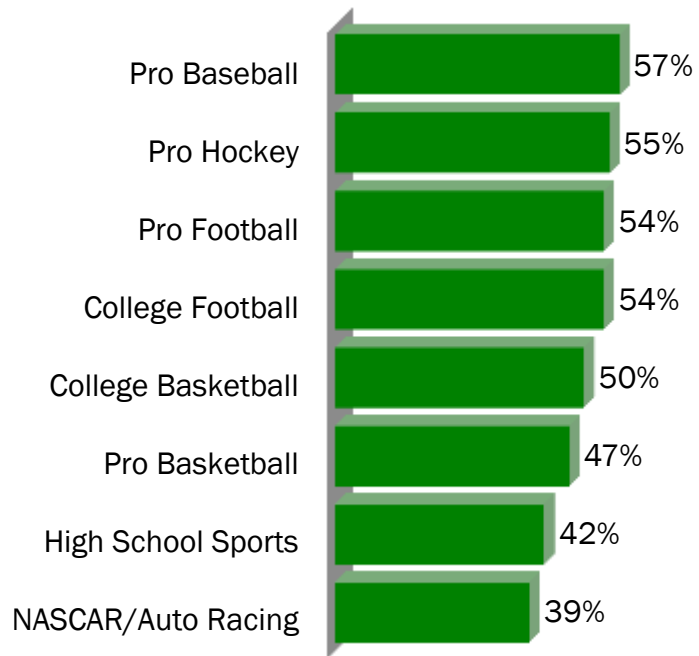


Adults 18+ Index

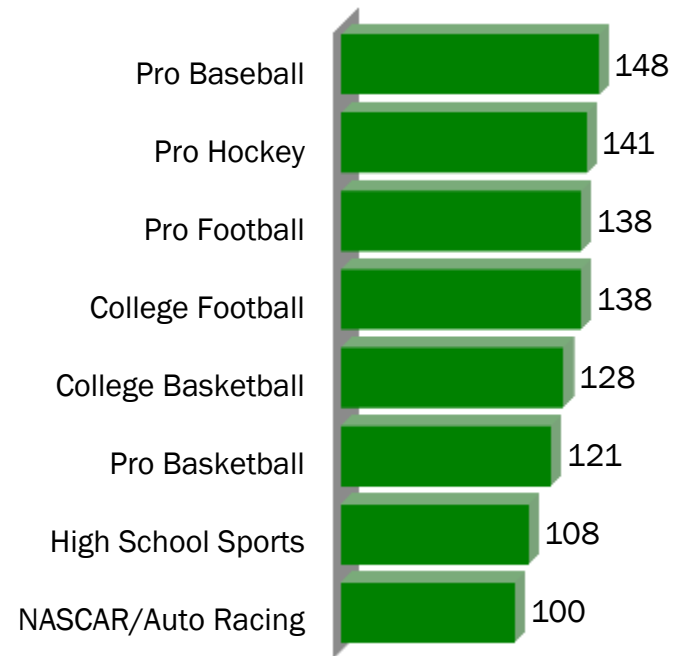


HOUSEHOLD INCOME \$75,000+

Adults 18+ Composition

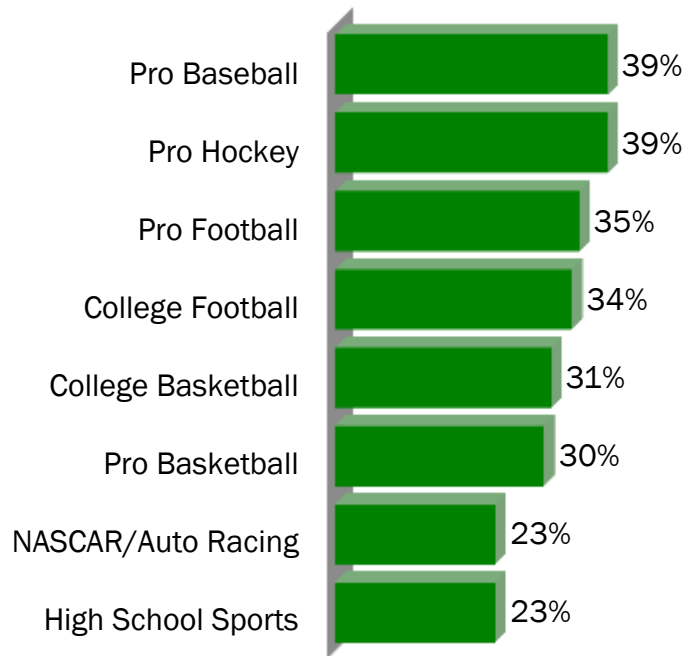


Adults 18+ Index

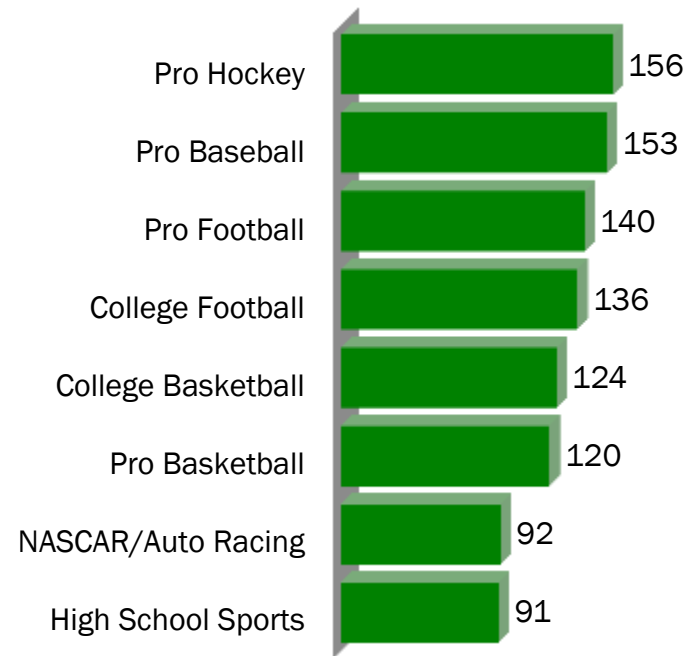


HOUSEHOLD INCOME \$100,000+

Adults 18+ Composition

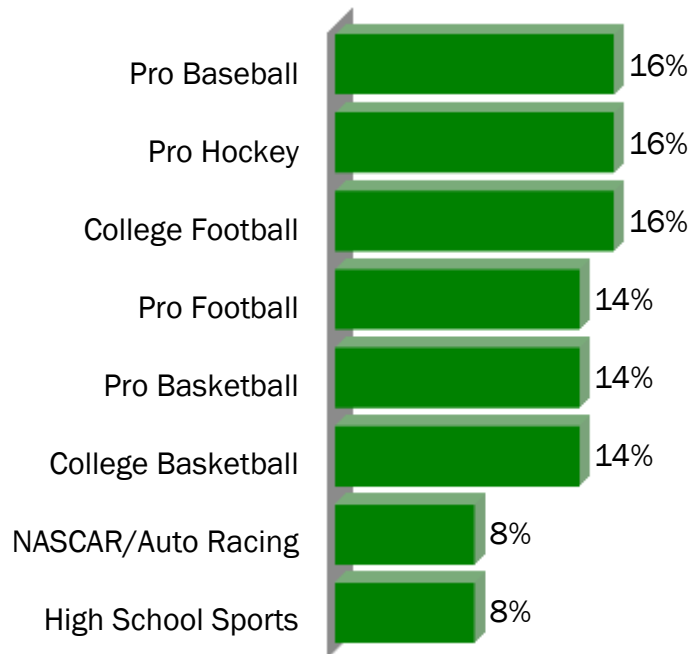


Adults 18+ Index

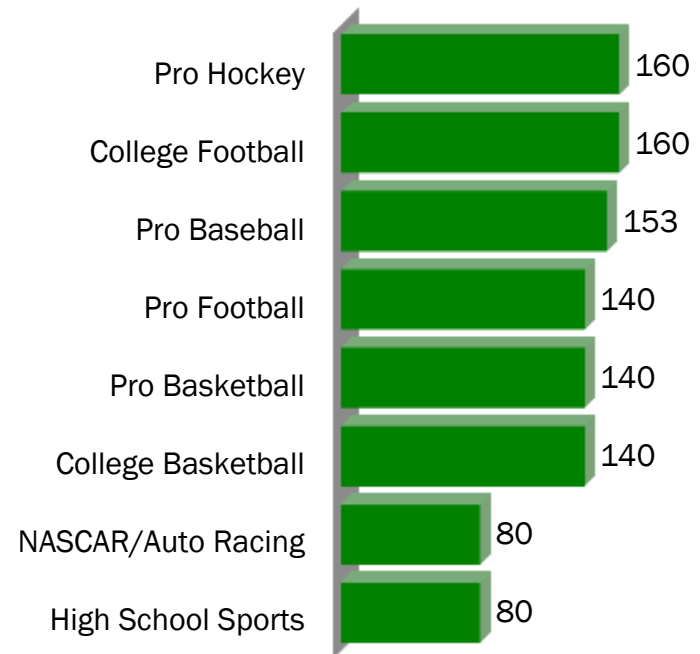


HOUSEHOLD INCOME \$150,000+

Adults 18+ Composition

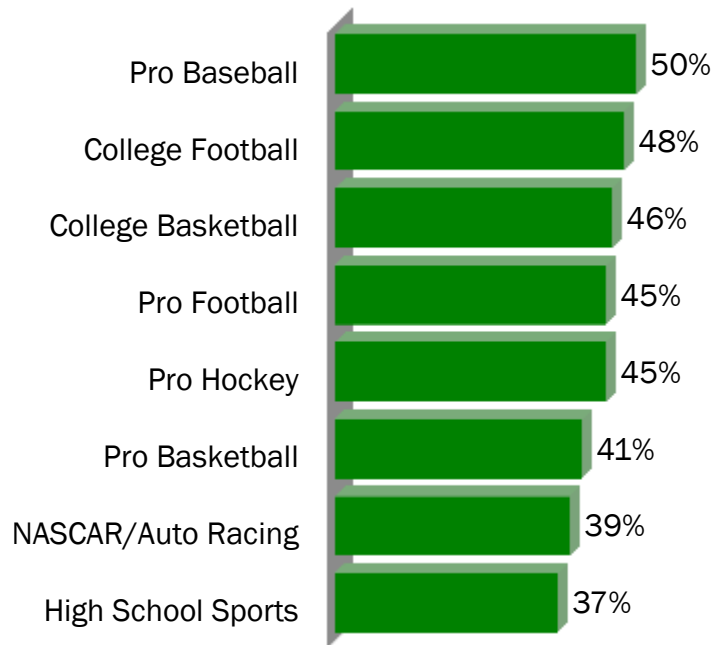


Adults 18+ Index

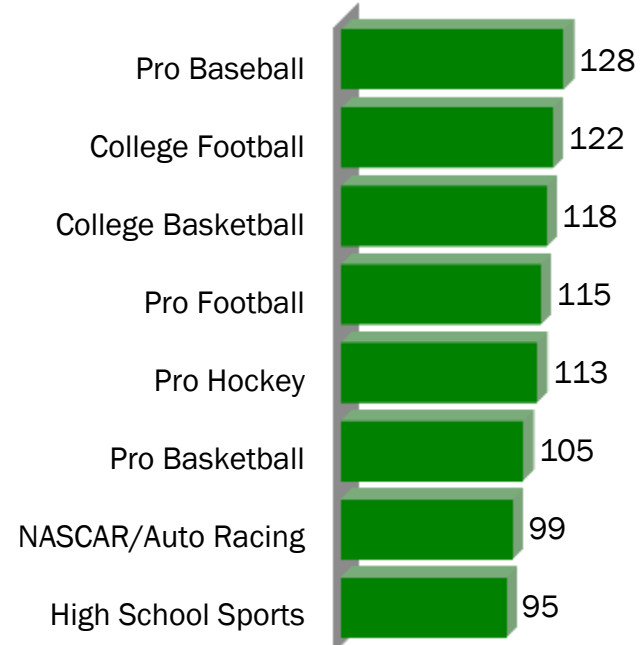


AUTOMOTIVE DECISION MAKER FOR NEW VEHICLE

Adults 18+ Composition



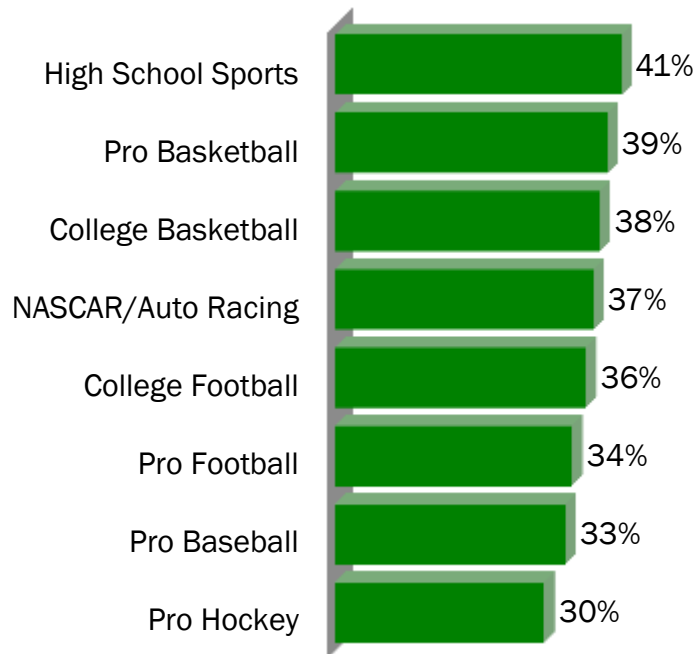
Adults 18+ Index



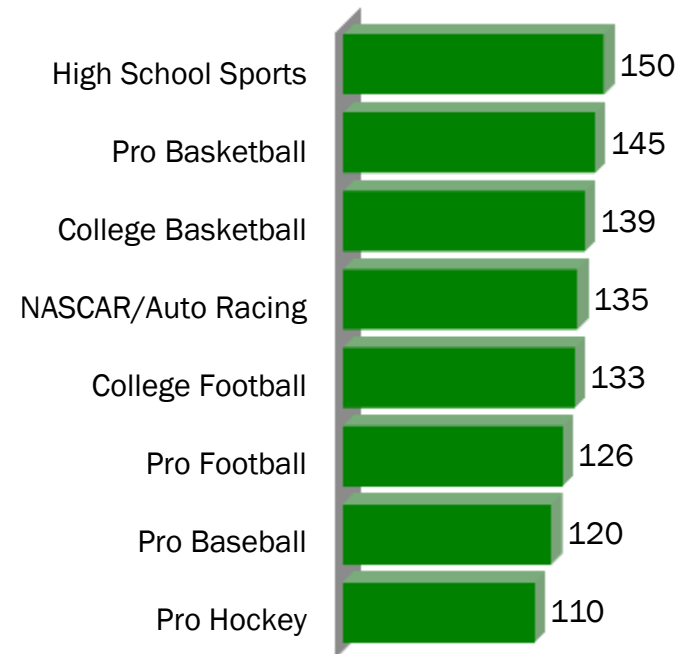
RESTAURANTS

VISITED FAST-FOOD RESTAURANT 13+ TIMES/LAST 30 DAYS

Adults 18+ Composition



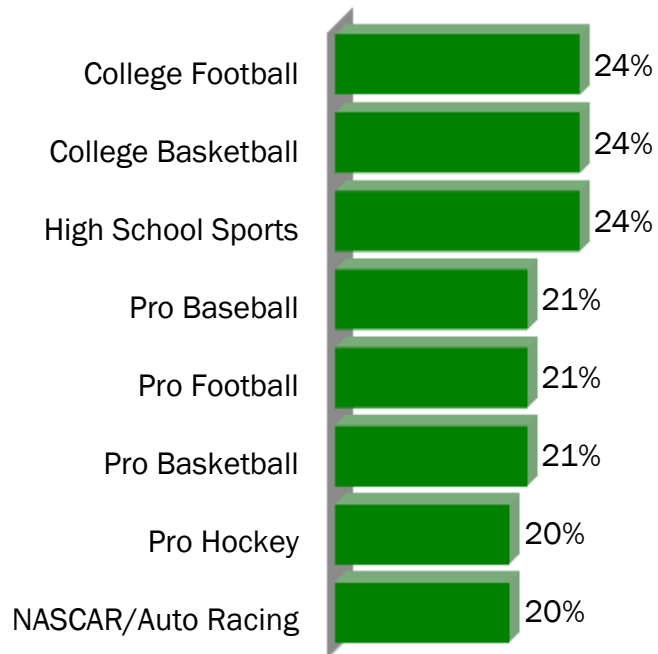
Adults 18+ Index



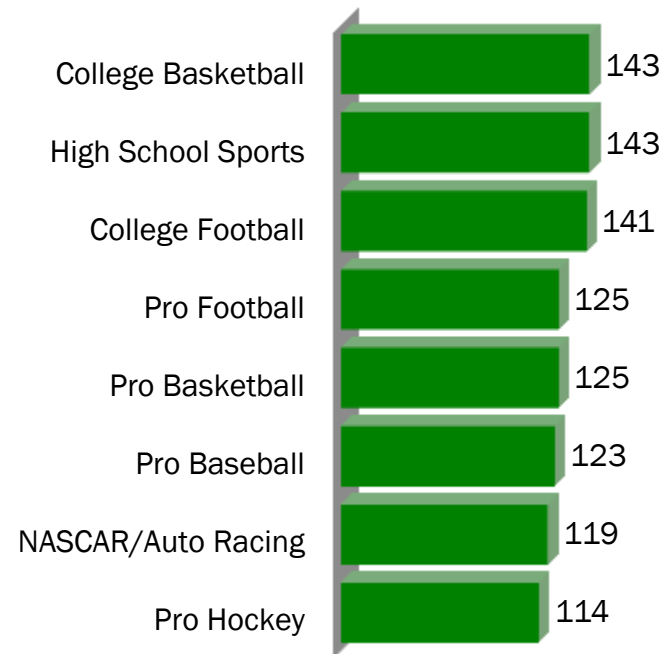
RESTAURANTS

VISITED FAMILY RESTAURANT 6+ TIMES/LAST 30 DAYS

Adults 18+ Composition



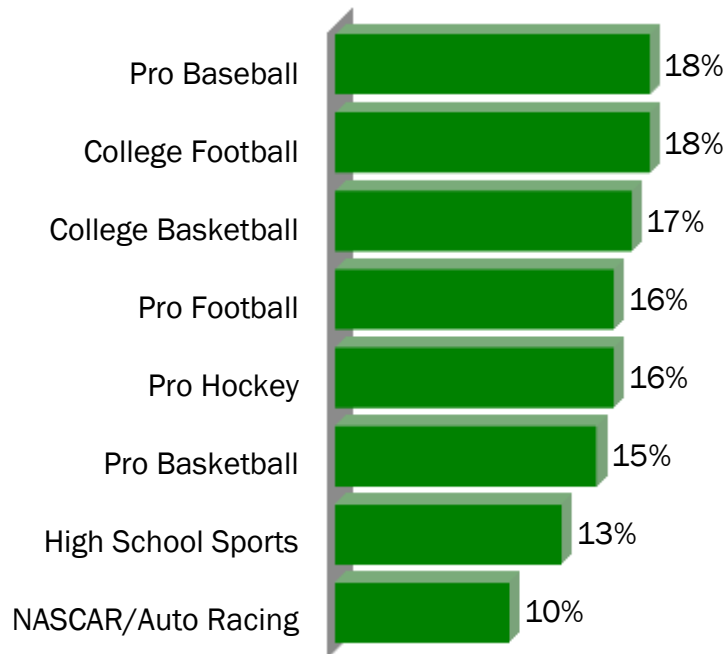
Adults 18+ Index



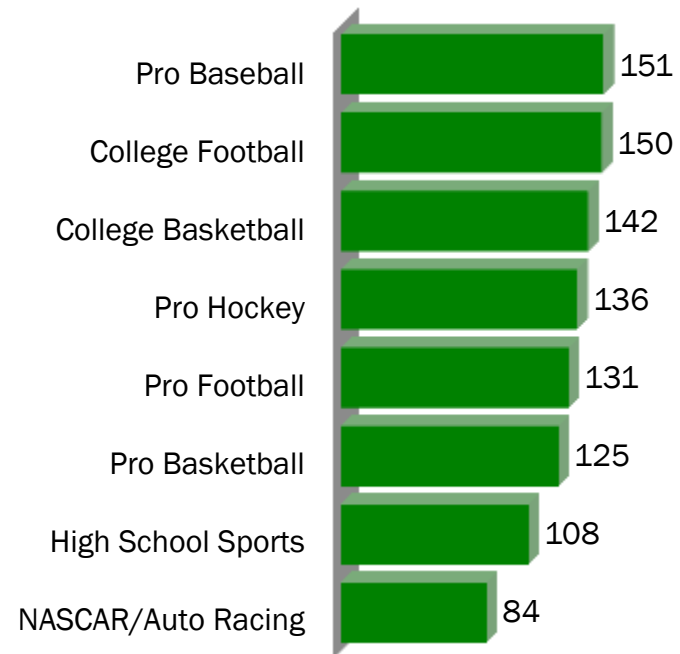
RESTAURANTS

VISITED FINE DINING RESTAURANT ANY TIME/LAST 30 DAYS

Adults 18+ Composition

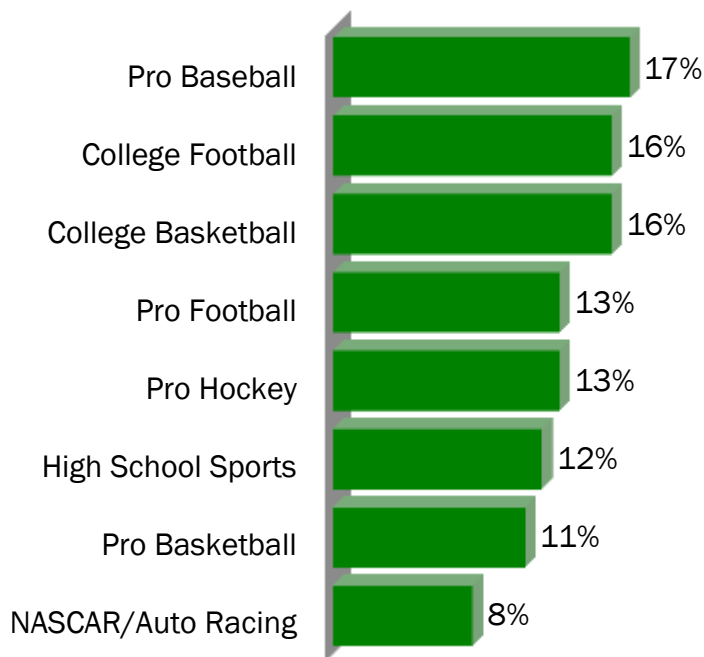


Adults 18+ Index

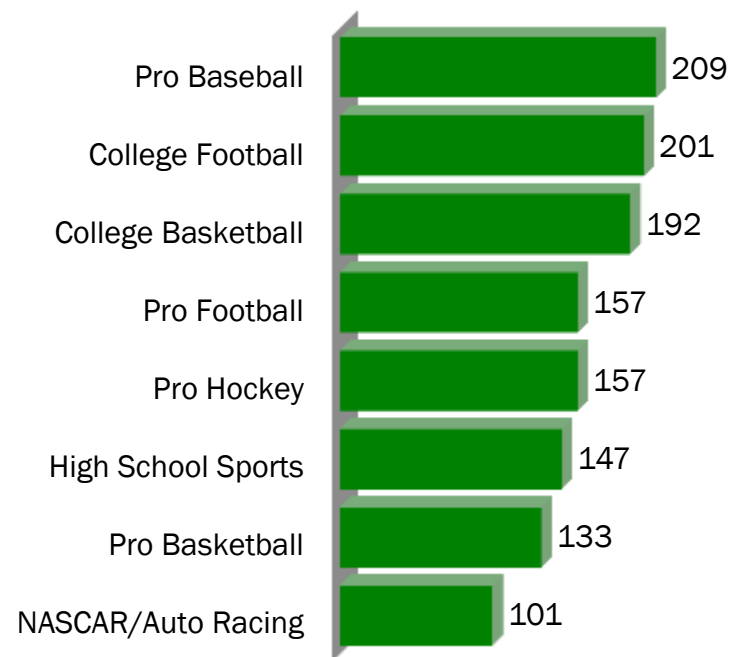


FINANCIAL HAVE INVESTMENTS WORTH \$150,000+

Adults 18+ Composition



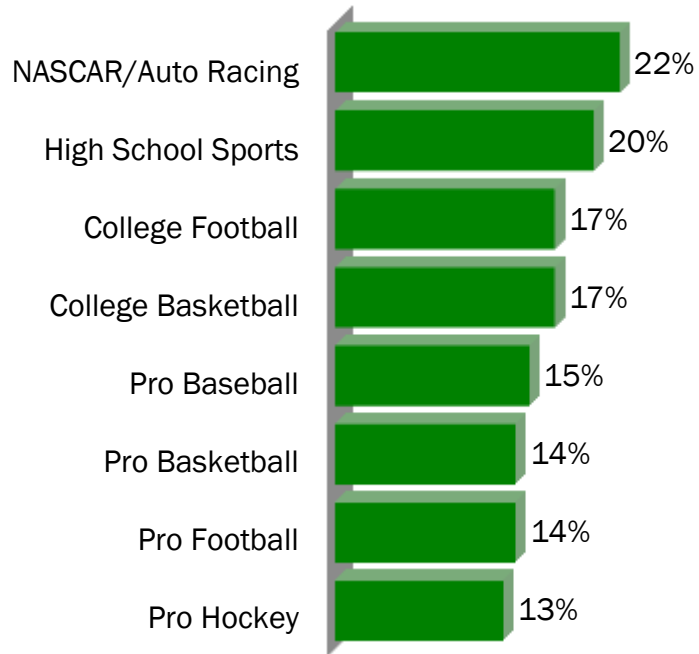
Adults 18+ Index



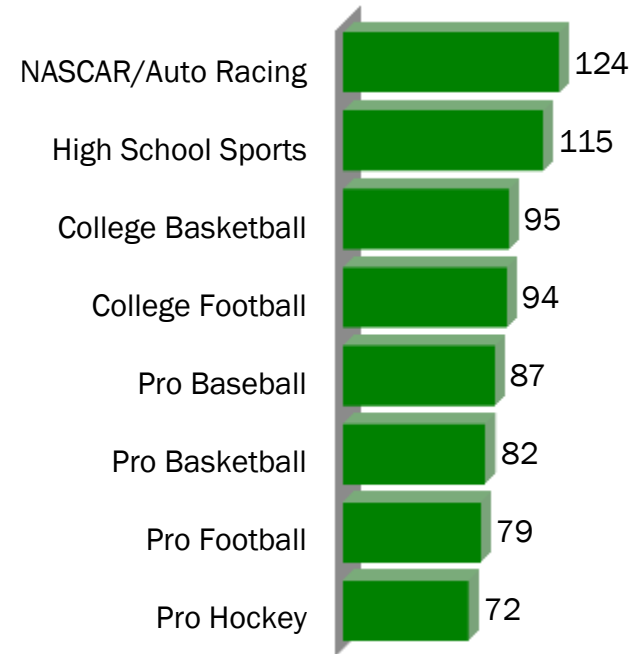
BUYING STYLES SEGMENTS

PENNY-PINCHERS

Adults 18+ Composition



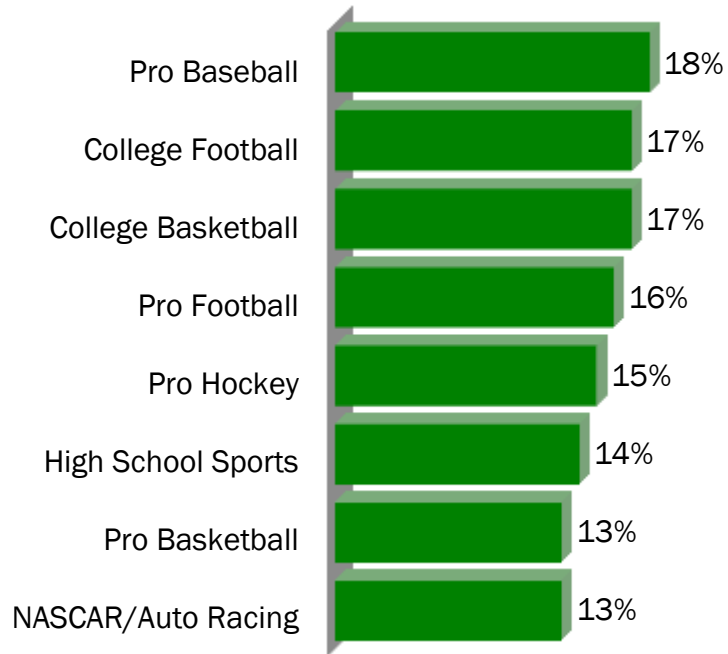
Adults 18+ Index



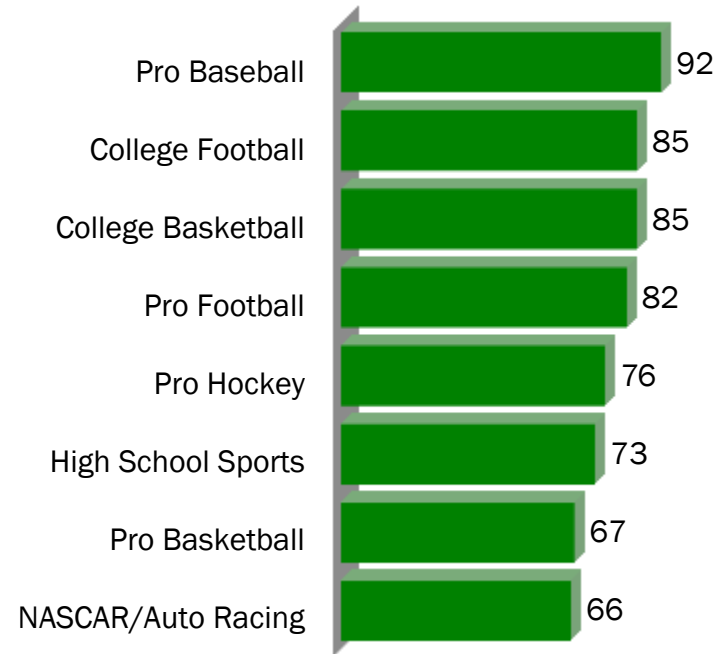
BUYING STYLES SEGMENTS

CONSCIENTIOUS CONSUMERS

Adults 18+ Composition



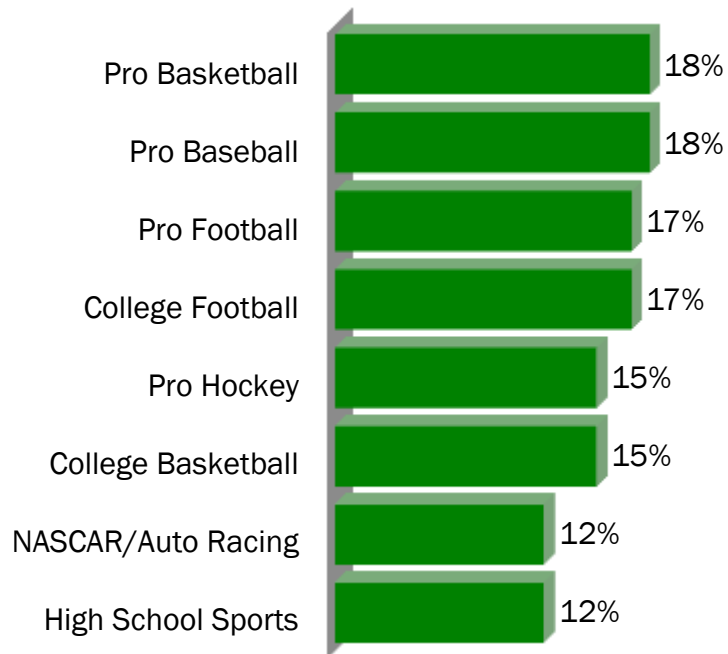
Adults 18+ Index



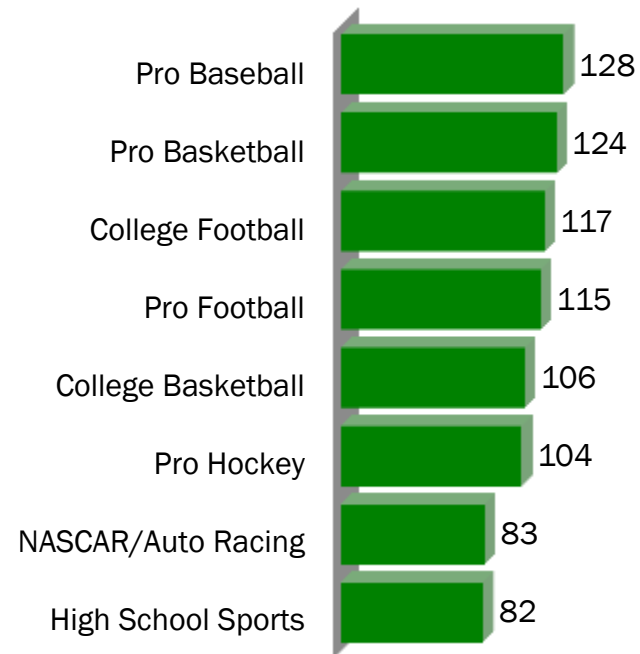
BUYING STYLES SEGMENTS

BUYERS OF THE BEST

Adults 18+ Composition



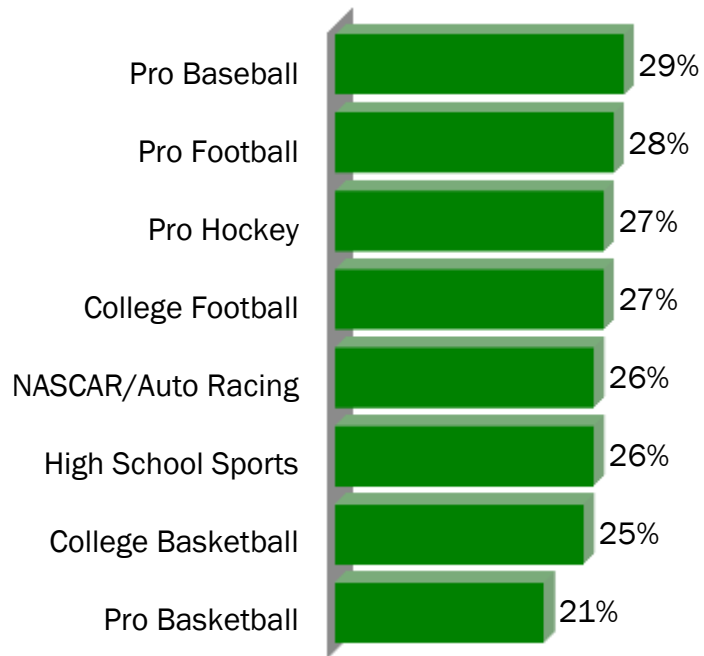
Adults 18+ Index



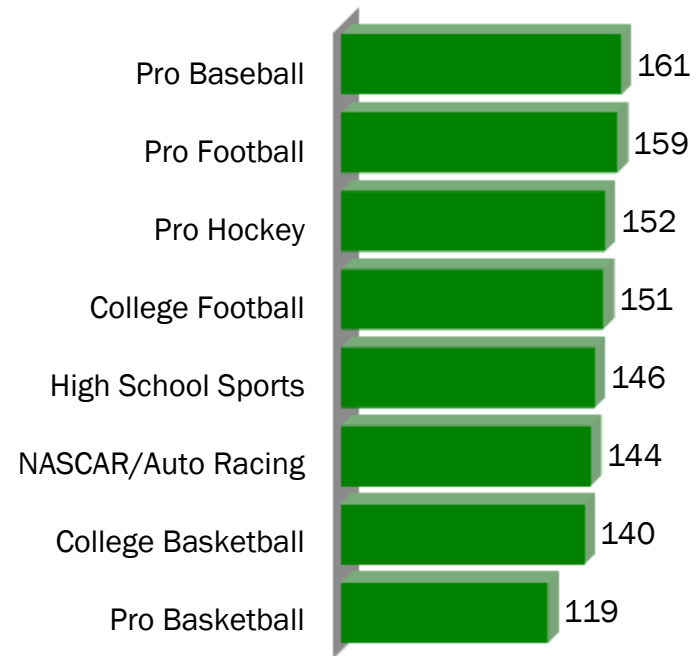
BUYING STYLES SEGMENTS

HABITUALIZED HAVERS

Adults 18+ Composition



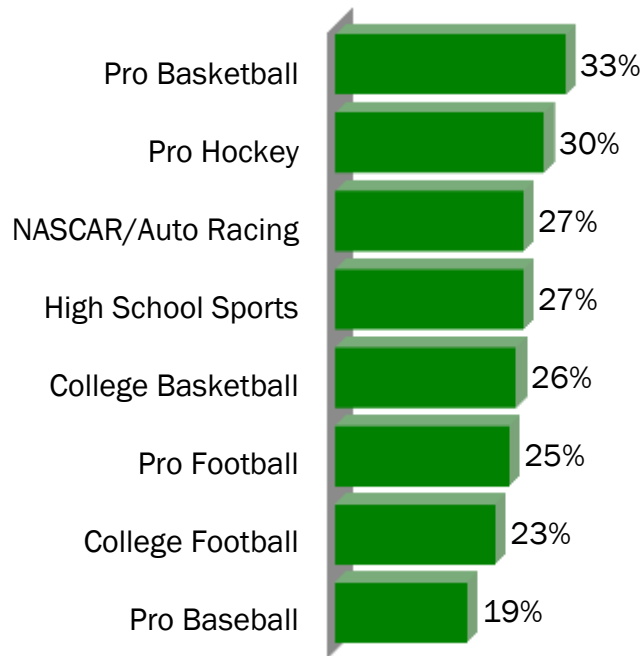
Adults 18+ Index



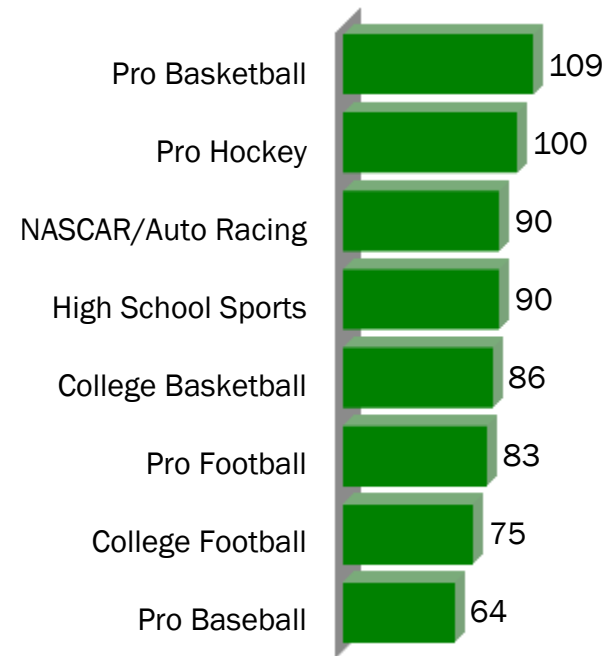
BUYING STYLES SEGMENTS

SWAYABLE SHOPAHOLICS

Adults 18+ Composition



Adults 18+ Index

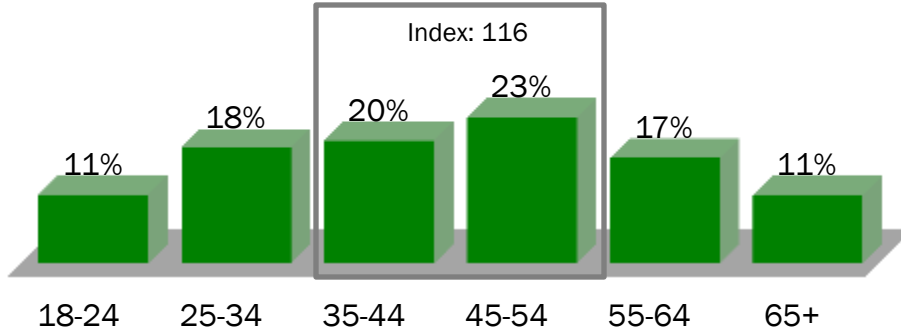


PROFILE OF THE PLAY-BY-PLAY LISTENER



SPORTS RADIO LISTENERS AGE & GENDER

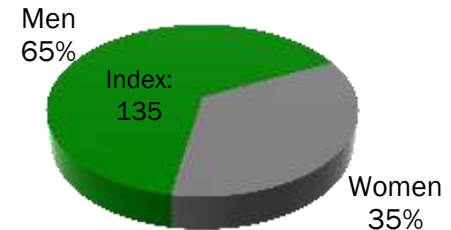
Adults 18+ Age Composition



Sports Radio Listeners are 16% more likely to be in the 35-54 age group compared to the general population.

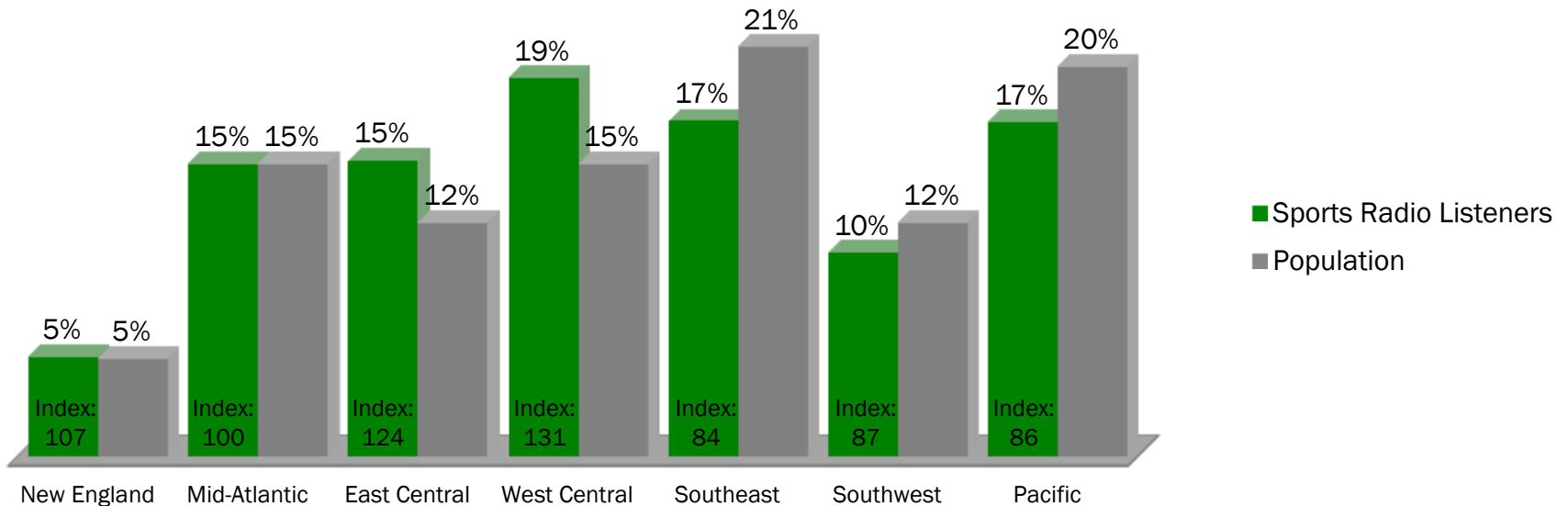
Sports Radio Listeners are 35% more likely to be male compared to the general population.

Adults 18+ Gender Composition



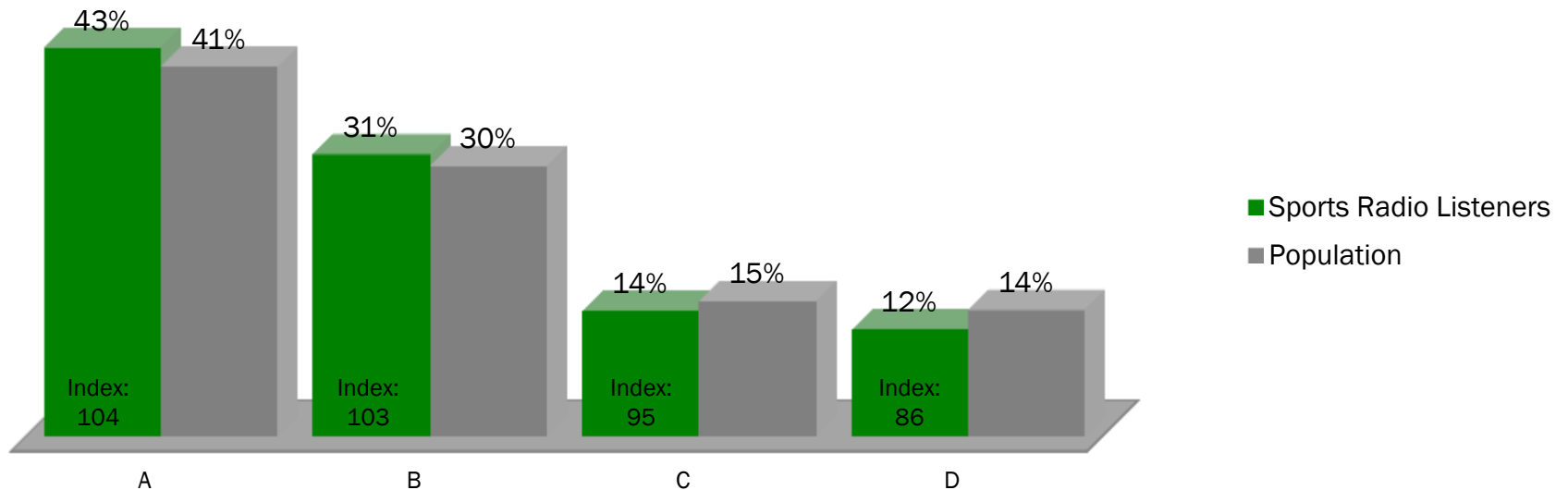
SPORTS RADIO LISTENERS MARKETING REGION

Adults 18+ Marketing Region Composition



SPORTS RADIO LISTENERS COUNTY SIZE

Adults 18+ County Size Composition

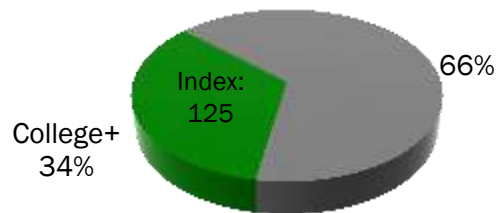


A is the largest county size. D is the smallest county size.

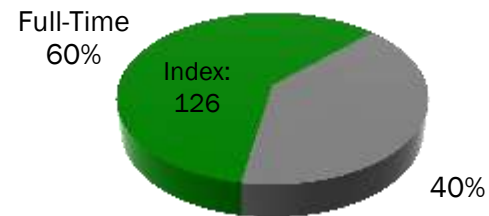
SPORTS RADIO LISTENERS EDUCATION & EMPLOYMENT

Sports Radio Listeners are 25% more likely to have graduated college compared to the general population.

Adults 18+
Education Composition



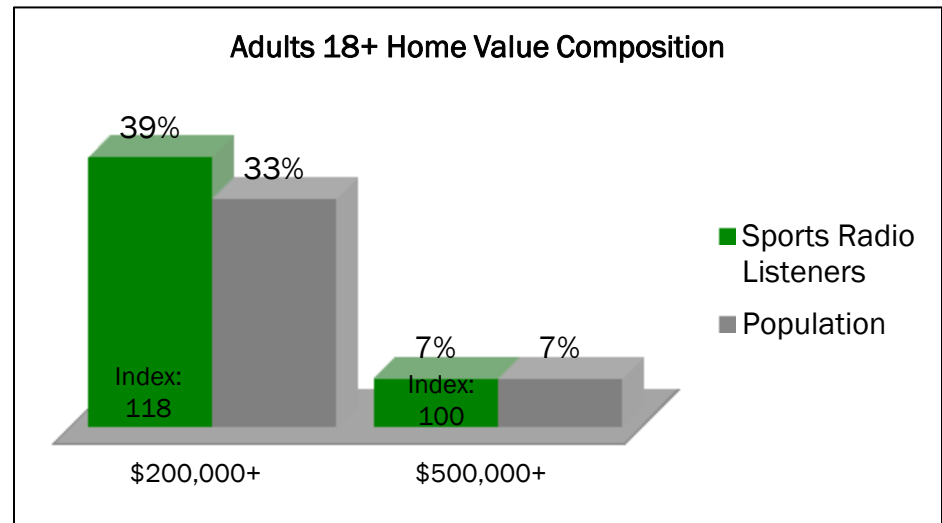
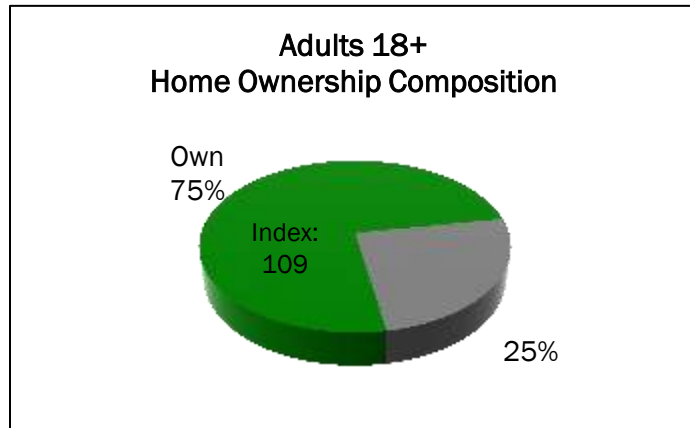
Adults 18+
Employment Status Composition



Sports Radio Listeners are 26% more likely to be employed full-time compared to the general population.

SPORTS RADIO LISTENERS HOME OWNERSHIP

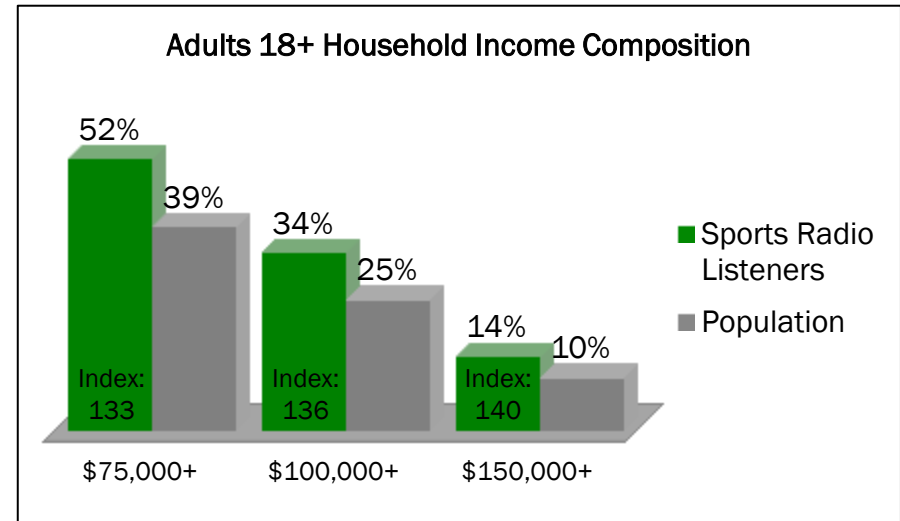
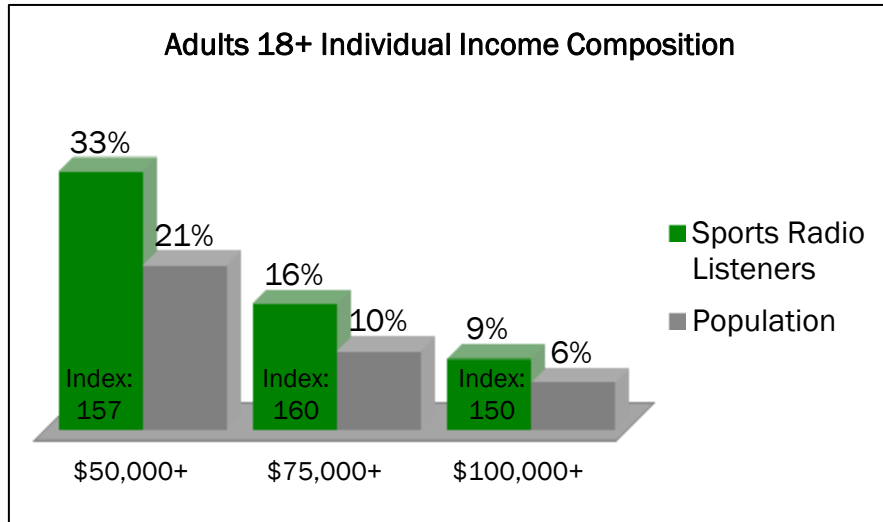
Sports Radio Listeners are 9% more likely to own a home compared to the general population.



Sports Radio Listeners are 18% more likely to own a home valued at \$200,000 or more compared to the general population.

SPORTS RADIO LISTENERS INCOME

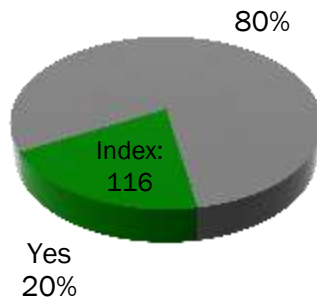
Sports Radio Listeners are 50% more likely to have an individual income of \$100,000 or more compared to the general population.



Sports Radio Listeners are 40% more likely to have a household income of \$150,000 or more compared to the general population.

SPORTS RADIO LISTENERS AUTOMOTIVE

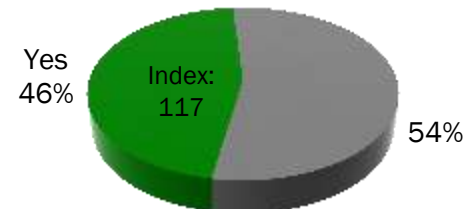
Adults 18+ Composition
Spent \$30,000+ on Current Vehicle



Sports Radio Listeners are 16% more likely to have spent \$30,000 or more on a current owned or leased vehicle compared to the general population.

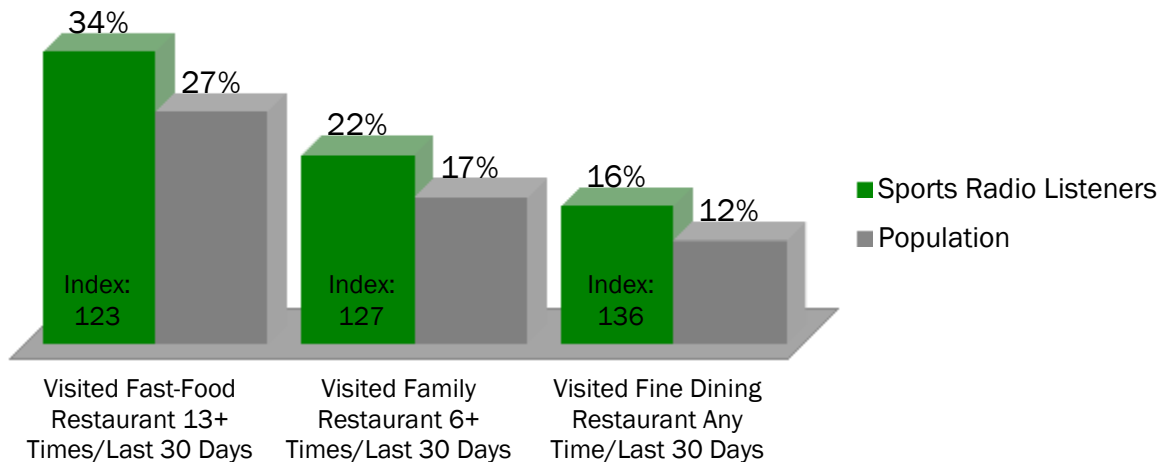
Sports Radio Listeners are 17% more likely to be the decision maker for a new vehicle compared to the general population.

Adults 18+ Composition
Decision Maker for New Vehicle



SPORTS RADIO LISTENERS RESTAURANTS

Adults 18+ Composition



Compared to the general population, Sports Radio Listeners are:

- 23% more likely to have visited a fast-food or drive-in restaurant 13 or more times in the last 30 days.
- 27% more likely to have visited a family restaurant or steakhouse six or more times in the last 30 days.
- 36% more likely to have visited a fine dining restaurant in the last 30 days.

SPORTS RADIO LISTENERS FINANCIAL

Compared to the general population, Sports Radio Listeners are:

- 65% more likely to have a 401(k).
- 59% more likely to have money market funds.
- 72% more likely to own stock.
- 88% more likely to have any investments totaling \$250,000 or more.

ADULTS 18+ WHO HAVE:	INDEX
401(k)	165
529 plan (College Savings Plan)	180
U.S. savings bond	157
Money market funds	159
Any stock	172
Any investments \$100,000+	174
Any investments \$150,000+	176
Any investments \$250,000+	188

SPORTS RADIO LISTENERS LEISURE ACTIVITIES

ADULTS 18+ WHO HAVE ATTENDED/PARTICIPATED IN THE LAST 12 MONTHS	INDEX
Auto shows	149
Adult education courses	133
Art galleries or shows	123
Horse races	193
Country music performances	166
Rock music performances	159
Classical music/opera performances	125
Bars/night clubs	153
Beach	134
Cooking for fun	117
Dining out	130
Home decoration and furnishing	106
Live theater	132
Museums	137
Zoo	140

Compared to the general population, Sports Radio Listeners are:

- 23% more likely to have visited an art gallery or attended an art show in the last 12 months.
- 53% more likely to have visited a bar or night club in the last 12 months.
- 32% more likely to have attended a live theater performance in the last 12 months.

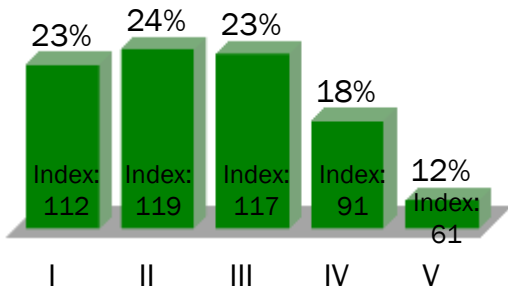
SPORTS RADIO LISTENERS BUYING STYLES

Adults 18+ Who Mostly Agree with Statement

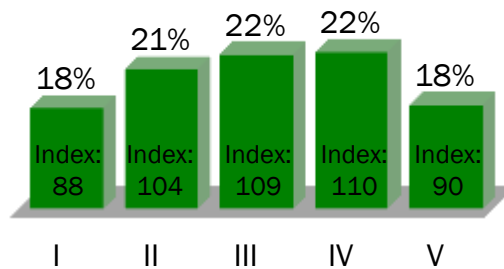
STATEMENT	COMPOSITION	INDEX
Buying American products is important to me.	45%	107
When I find a brand I like, I stick to it.	37%	100
I like to shop around before making a purchase.	33%	99
Generic or store-brand products are as effective as brand-name products.	25%	96
I buy based on quality, not price.	17%	93
I don't have time to bother clipping or saving coupons.	13%	93
Price is more important to me than brand names.	24%	88
I don't make purchase decisions based on advertising.	21%	86
I tend to make impulse purchases.	6%	86
My number one goal when shopping is to save as much money as possible.	31%	85
I will gladly switch brands to use a coupon.	10%	85
I'm a "spender" rather than a "saver."	9%	83
I enjoy wandering the store looking for new, interesting products.	13%	80
I am willing to pay more for a product that is environmentally safe.	10%	80
I'm always one of the first of my friends to try new products or services.	5%	72
I am influenced by what's hot and what's not.	5%	71
A celebrity endorsement may influence me to consider or buy a product.	3%	63

SPORTS RADIO LISTENERS MEDIA QUINTILES

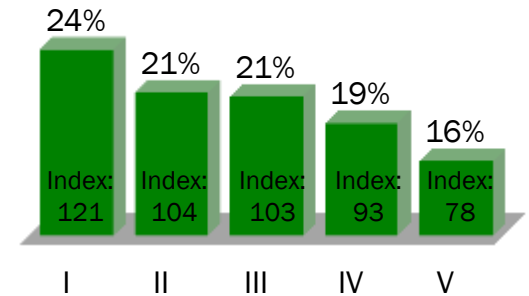
Adults 18+ Radio Quintiles



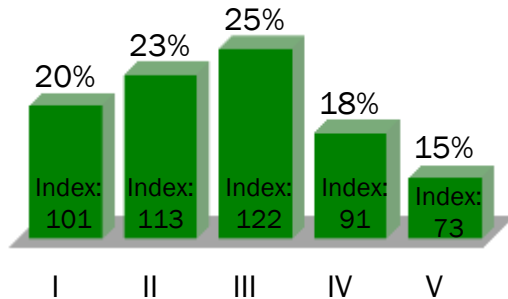
Adults 18+ Television Quintiles



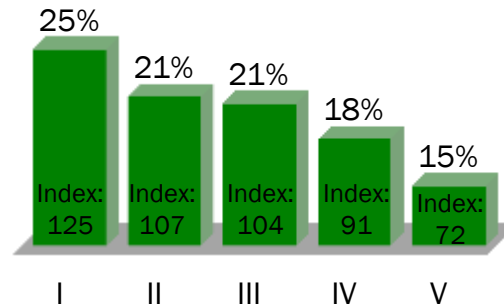
Adults 18+ Newspaper Quintiles



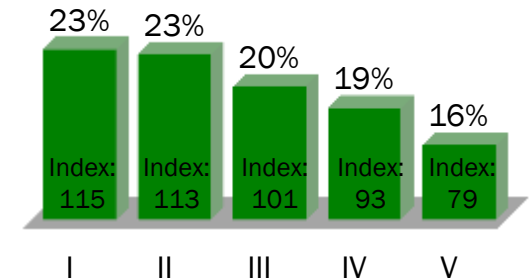
Adults 18+ Internet Quintiles



Adults 18+ Outdoor Quintiles



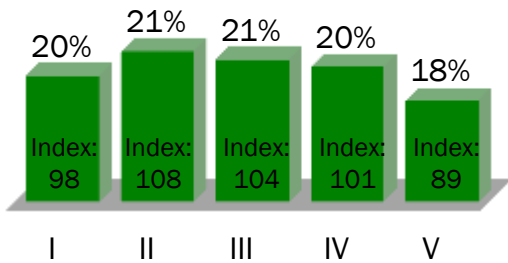
Adults 18+ Magazine Quintiles



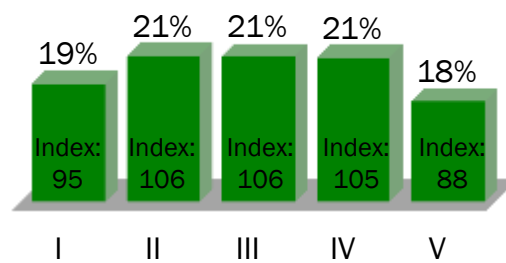
I is the heaviest media quintile. V is the lightest media quintile.

SPORTS ENTHUSIASTS MEDIA QUINTILES

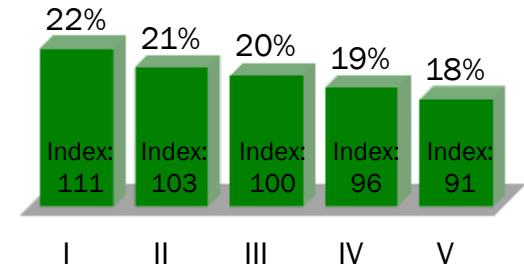
Adults 18+ Radio Quintiles



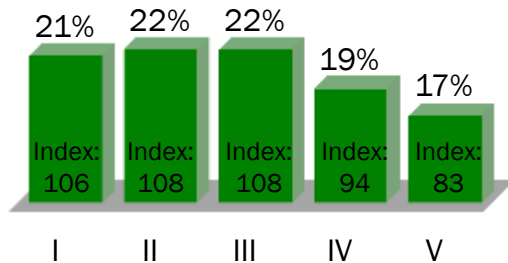
Adults 18+ Television Quintiles



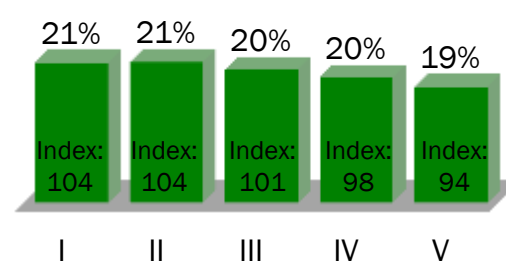
Adults 18+ Newspaper Quintiles



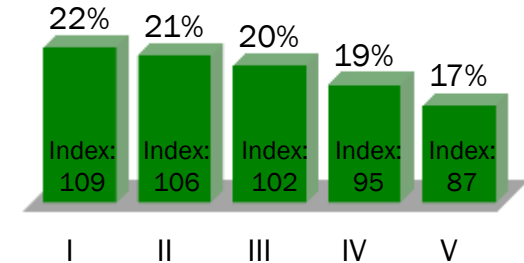
Adults 18+ Internet Quintiles



Adults 18+ Outdoor Quintiles



Adults 18+ Magazine Quintiles



I is the heaviest media quintile. V is the lightest media quintile.

CONCLUSION

- Play-by-play sports on the radio offers advertisers a unique and highly desirable audience
- Play-by-play sports on the radio cannot be valued by cost-per-points
- Each sport has a different profile

HOW TO LEARN MORE

Applying this study to your station:

- Research Director, Inc. can help you use local-market research to quantify why your sports station deserves a premium rate
- Request your free, no-obligation consultation
- Contact Charlie Sislen at csislen@ResearchDirectorInc.com or 410-956-0363 x14

Available for purchase through GfK MRI:

- Full PowerPoint presentation including listener profiles of the 8 sports examined
- Excel spreadsheet with 600+ categories
- Additional data on those who watch sports on TV
- Contact Amy King at Amy.King@GfKMRI.com or 212-884-9236