



Arbitron/Joint Communications

# What Women Want:

## Five Secrets to Better Ratings

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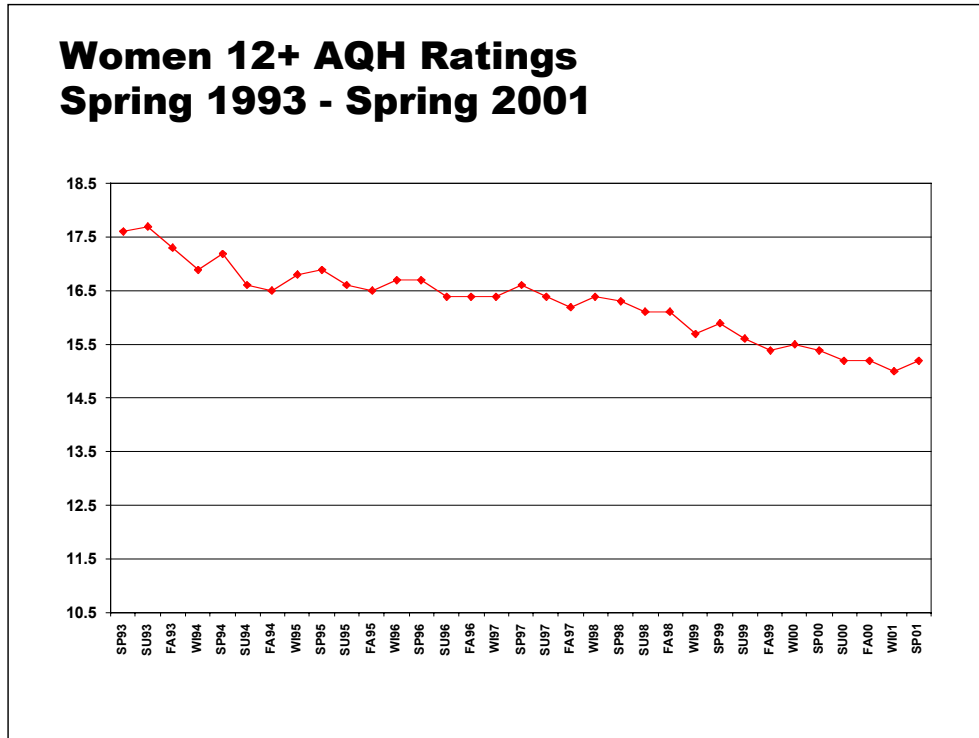
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## Overview

The Arbitron/Joint Communications study of American women radio listeners, based on interviews with Arbitron diarykeepers, asked the timeless question “What do women want?”

Radio listening levels of women have been declining sharply for the past several years, and with other technologies and entertainment vying for women’s attention, it is time for radio to think again about how to reach this valuable group of listeners.



Women are an increasingly desirable target for advertisers and programmers alike. They become a bigger part of the workforce every day, contributing more to household incomes and making more household spending decisions than ever. A great number of advertising avails target women demos. Advertisers understand that they need to spend money to reach these consumers.

It becomes key, then, for radio programmers to understand how women use the medium of radio and what they want and expect from their radio experience. In this study, women told us the specific reasons they tuned in and tuned out of radio.

Women are juggling more responsibilities than ever. They are pressured for time, worried about their kids’ safety and overwhelmed by commercialization.

However, in spite of all the pressure, women today are still optimists. They are holding fast to the American dream. They believe they can choose what they will be and they believe that hard work brings success. Key themes in their lives seem to be lack of time and difficulty in winding down at

the end of the day. Radio plays a role not only in keeping these busy women up to date but also in serving as a stress reducer and, in some cases, a companion.

Different women are motivated by different programming elements. For example, AOR listeners are more likely to enjoy rude and risqué humor, and Oldies listeners are more likely to complain about radio that is inappropriate for kids. Yet, they all agree on some key items: Commercials are the number one reason they tune out of radio, and surprisingly, half of 18- to 24-year-olds “strongly agree” that radio should be okay for them to listen to with kids.

In other words, this study shatters many stereotypes and reinforces others.

It puts contests in a new light, challenging common wisdom that most listeners enjoy playing along with contests even if they don't try to enter. And, it shows the power of frequent-listener or at-work clubs.

It's truly a window on what women want.

## **The Study**

In July 2001, Joint Communications conducted telephone interviews with 1,060 female Arbitron diarykeepers aged 18-54 to find out what they want from radio. Diarykeepers of all Arbitron-identified formats were included. These women were asked questions about lifestyle, loves/hates about radio, reasons for tuning in or out, and specific radio behaviors and needs.

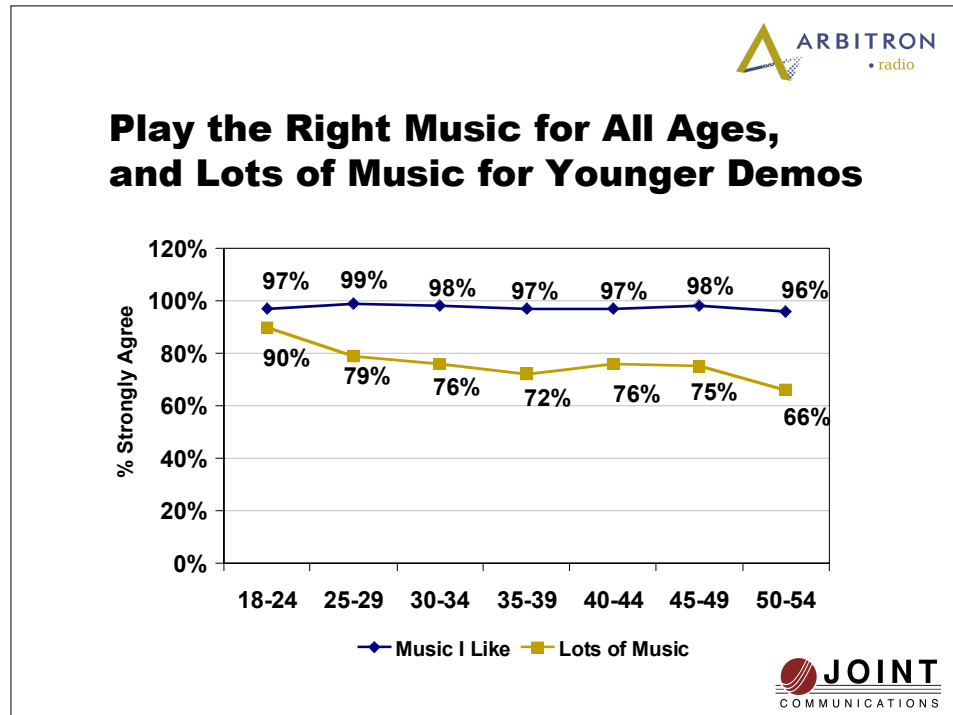
## Significant Highlights

- **Women want their favorite music and lots of music, even if their favorite format is news.** Regardless of age, regardless of format, women said that their favorite music was the number one reason they tuned in to radio. Women are also interested in hearing “lots” of music, but “favorite” music was the clear winner for tuning in. This says that stations should give lots of music, but *most* importantly, the right music.
- **Women demand radio that they can listen to with children, and will turn the dial if it is offensive.** Women are making their own radio choices when kids are in the car, but they still want material that is appropriate for younger ears. Over half of all 18- to 24-year-olds also said they would tune out if the content were inappropriate for kids, suggesting there is a need for less offensive material.
- **“Too many commercials” is the leading tune-out for women.** This is not surprising in a time where stations are stretching their inventory to the maximum limits and waiting for listeners to balk. The diarykeepers we spoke with did not hesitate to say that “too many commercials” caused them to turn the dial, so maybe it is time to rethink how your female-targeted station is handling spot loads and creative.
- **There are nine lifestyle factors that drive music tune-in and three that drive tune-out.** Women generally fit into one of nine groups according to their tune-in factors: Mood Seekers; Optimists; Infoholics; Laughers and Gamers; Worried, Poor and Angry; Just Music Fans; Sports Fans; Loners; and Risqué Fans. Women also fall into one of three groups according to tune-out factors: Wrong Song/Ad Haters; Insensitive Content Dislikers; and No Time to Listen/Don’t Like Contests. Find detail for each of these groups under “Key Findings,” and find detail for specific formats at [www.arbitron.com](http://www.arbitron.com).
- **Women who belong to a frequent-listener club are much more positive about most aspects of radio, including DJs, contests and their favorite station.** These women see radio as a companion and they are fiercely loyal. They are valuable targets both for stations and advertisers because their time spent listening (TSL) is double that of a non-club member, and they use radio to influence purchase decisions.
- **Women are more motivated by hearing about radio station programming and activities from a friend than by any other advertising medium.** Women network personally with other women and with men, and an overwhelming majority said that the best way to reach them with information about your station was by hearing it from a friend! They do love their dramas and comedies on television, and television ranked number two for reaching them, but nothing beats a word-of-mouth reference.
- **Contests must be carefully targeted and focused for women, since many see them as a tune-out factor.** Almost 40% of women do not want any contesting at all. Only 23% find contests entertaining to listen to, even if they do not play. So you think the cash giveaways and “win the key to start the new car” work for everybody? Think carefully about contesting. It can be valuable for your frequent-listener club members and your at-work listeners, but remember that it does not have mass appeal with women.

- **Working women are only slightly more prone to contests than other women.** Women who listen to the radio at work are more likely to participate in a contest. Keep in mind, though, that only 24% of women access the Internet at work, so tying at-work contests to the Web site is not a good idea.

## Key Findings

1. **Women say that “favorite music” is the biggest reason for tuning in, and the need for “lots of music” diminishes with age.** Women overwhelmingly said that “Music I Like” is the biggest reason they tune in (87%), followed by “Lots of Music” (76%), regardless of their favorite format. The demand for “Music I Like” does not change through the age cells, but the demand for “Lots of Music” declines with age. Ninety percent of Women aged 18-24 cite “Lots of Music” as a tune-in factor, but only 66% of Women 50-54 say the same thing. This emphasizes that picking the correct songs can be key in keeping women tuned in. Fifty-eight percent of women said that they would tune out because of a song they did not like. It appears that at the upper end of the 18-54 demo, the “right” songs are more important than “a lot” of songs.



2. **Women will turn the dial if they hear programming that is not “family friendly.”** Ninety-two percent of women strongly agree that family is the most important thing to them. This comes into play with radio habits, since over 60% of women strongly agree that they tune out a radio station because there is something they don’t want kids to hear. Even among 18- to 24-year-olds, a majority are concerned about what kids hear on the radio.

3. **“Too many commercials” is the number one tune-out.** Women had no problem telling us what they do not want, and most are saying loud and clear that “too many commercials” is the reason they turn the dial. While programmers and managers argue about spot loads, women are busy tuning out the station. Seventy-six percent of women said that “too many commercials” cause them to tune out. This percentage stayed consistent regardless of age.
4. **It is critical that radio keeps women informed.** We found that women universally are feeling a time crunch, regardless of age, and they are relying on radio to keep them up to date with what’s going on in the world. Women answered, unprompted, that news (breaking news, frequent news, concise news) was one of their loves about radio. In fact, more women mentioned news than air personalities. Also, while a woman’s interest in other programming elements such as contests and funny DJs declines as she ages, her interest in news, weather and traffic remains strong over all ages 18-54. Playing her favorite music and keeping her informed are not mutually exclusive!
5. **Women want to hear the song identified, and that’s more important than funny DJs.** Fifty-five percent of women strongly agreed that radio stations should identify songs and artists more than they do now. This is not a demand unique to one age cell or format. Women of all ages strongly agree that this is important.

This is not surprising in an era where radio stations don’t identify songs and record companies don’t even put the names of songs on their actual CDs.

Only 45% said that funny DJs would cause them to tune in a station, and only 37% said that “radio should make me laugh.” The interest in humor varies by format, with women listeners of CHR, Urban/Urban AC and Country being most interested in humor.

6. **Women continue to be optimists and American dreamers.** Even though women are heavily pressured for time and responsibility, they remain optimists. So, don’t play to the negatives.

Seventy-nine percent of female Arbitron diarykeepers “strongly agree” that hard work brings success, and 68% believe they can be whatever they choose to be. Those are statistics that are uniquely American, and reflect a free and upwardly mobile society. Sixty-two percent of these women also said that they feel happy and content most of the time.

7. **Women dislike “rude announcers” almost as much as “too many commercials.”** Seventy-one percent of women strongly agreed that “rude announcers” caused them to tune out, and 59% of women said cheesy/phony announcers caused them to tune out. Women seem to have a big problem with rude announcers across all ages. Even among 18- to 24-year-olds, 65% strongly agreed that “rude announcers” are a tune-out.

When asked to put their feelings about radio in their own words, specifically about what they “disliked or even hated” about radio, some said “too much people-bashing,” “making fun of people” and “crude/rude DJs.” They used every word they could think of to describe the material: “crude,” “rude,” “lewd,” “racist,” “sexist,” “profane” and “obscene.”

Rudeness, phoniness and meanspiritedness are big no-nos with female diarykeepers regardless of age. Remember that female diarykeepers are really concerned about kids and what they hear. They are tired of rudeness and inappropriateness.

- 8. There are nine major groups that explain why women tune in.** Most formats have three or four factor groups that make up the motivations for a majority of their listeners. Understanding what motivates women and what their lifestyle circumstances are helps in all aspects of programming and marketing. Here are summaries of each group:
- *Mood Seekers* are most likely to listen to the radio for a change in mood, whether it's to relax, pick up energy or laugh. They use radio to escape day-to-day life and believe that radio keeps them company. These women believe that radio is important to help them make buying decisions.
  - *Infoholics* tune in to radio specifically looking for information.
  - *Laughers and Gamers* are the most likely to play contests, and they will tune in to a station for the funny DJs and funny elements of the station. They spend the most time with radio of any group (four hours a day). This group really drives contesting, with 55% saying that radio contests are fun to listen to, even if they don't play.
  - *Just Music Fans* are just that. These women want their favorite music, and lots of it. They are not interested in a lot of talk or contests.
  - *Optimists* are also looking for music. They are confident, very positive about the future, and feel good about themselves. They do not react well to hearing what they would call an "antiwoman" attitude on the air.
  - *Worried, Poor and Angry* are the opposite of the Optimists. They worry about their kids, their health, their money and their future. They agree that they are "more angry than I used to be" and they listen to the radio for escape. They also spend the most time with television.
  - *Sports Fans* are a very small group that tune in only for sports. No other tune-in factor group really wants sports.
  - *Loners* like lots of music but they are not particularly social. They spend the least amount of time per day with radio of any group, but they have the highest percentage of any group who say that radio is important for buying decisions. They see the radio as a companion and relate to radio personalities. They are likely to want a visit from radio personnel at their workplace.
  - *Risqué Fans* are attracted to off-color humor and presentation. This is a very small group, and even though they like edgy radio, it does not mean that they like rude announcers. Fifty-seven percent "strongly agree" that they tune out if they hear rude announcers. This crowd is more interested in laughing than in rudeness.
- 9. There are three major tune-out factors:**
- *Wrong Song/Ad Haters* switch radio stations or turn radio off when they hear songs they don't like or commercials. In this type of listener's mind, wrong songs and ads are linked together, resulting in intense listener aversion to either of them. In other words, if your station plays too many bad songs with good ones and runs a high commercial load, it will lose these women very fast.
  - *Insensitive Content Dislikers* are turned off by rudeness, cheesiness and programming that kids can't listen to. In other words, if the station is "insensitive," they're gone.

- *No Time to Listen/Don't Like Contests* form the third group. These diarykeepers simply can't listen any longer than they do right now. So, if your station says, "Now we play more of your favorites so you can listen longer," they'll shrug their shoulders and wonder who you're talking to. They really don't like contesting because it takes up time that they could be listening to music with. So, if your station is appealing to women who are under a lot of time pressures, contests are the wrong way to reach them.

Details on how these factors affect your format will be available on the Arbitron Web site when "What Women Want—Specific Formats" is posted during the next few months.

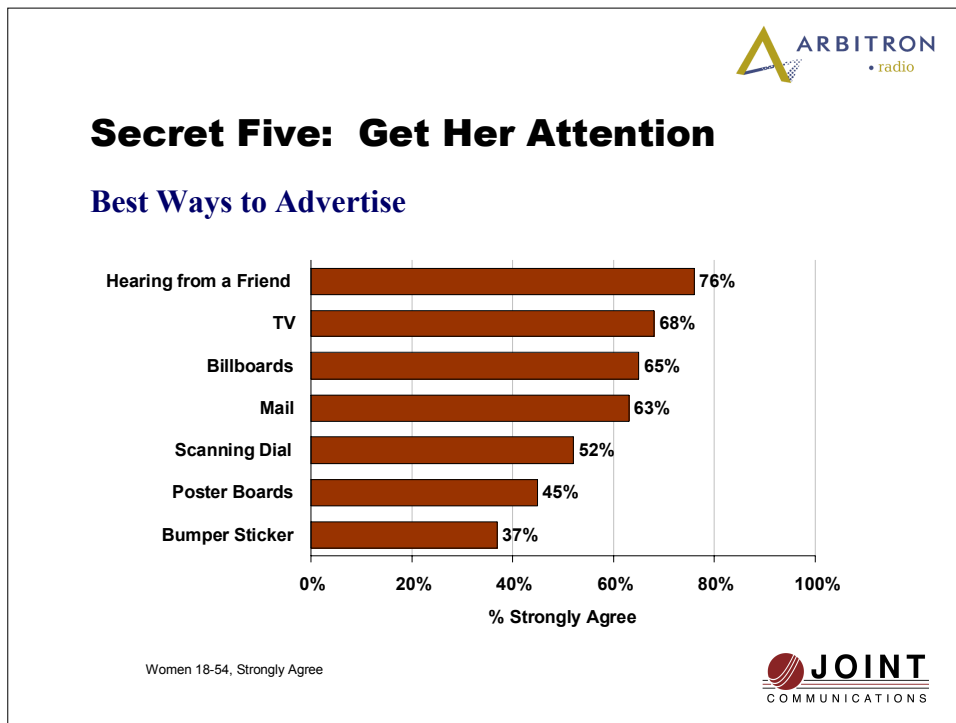
- 10. Most women work, but fewer than half of them listen to the radio at work.** If they listen to the radio at work, time spent listening is high—so they are important to your average quarter-hour. However, among working women, only 24% access the Internet at work. In other words, if you are using the Internet as your key way of connecting with them off air, you're leaving 76% of working diarykeepers out of your equation.
- 11. Most women access the Internet, just *not* at work.** Sixty-three percent of all women 18-54 log on weekly, with the most usage among Alternative listeners (71%). Female Country listeners spend the longest amount of time online per week. However, don't plan on linking any at-work contesting with your Web site if you are targeting women. Only 24% of women access the Internet at work. And for Adult Contemporary listeners, who are the biggest target of at-work marketing, only 33% log on at work. Maybe it's time to bring back some of those old-fashioned technologies like telephone and fax.
- 12. Only half of women enjoy their work, but almost three-fourths like their coworkers.** The big story is the fact that most women diarykeepers like the people they work with while remaining somewhat dissatisfied with their job. This social orientation is fulfilled by radio. It helps keep them company and get them through the day. However, they don't want radio to be too intrusive. Almost half use radio strictly as background music, just something to fill in the space and time as they do work that doesn't fully satisfy them.
- 13. Eighty-five percent of women said they do not want a visit from a radio personality at their workplace.** However, the 15% who do want a visit are much more likely to be loyal to you. There is a very high proportion of at-work/frequent-listener club members in this group. And, perhaps surprisingly, a higher proportion of 18- to 24-year-olds would like a visit from the radio station while they're at work.

**14. Although the number of working women who are frequent-listener club members is low, these women are highly desirable listeners for many reasons:**

- They are *twice as likely* to think contests are fun for entertainment value, even if they don't play.
- They are *three times as likely* to think of DJs as friends.
- They are *twice as likely* to think that DJs should make them laugh.
- They are *three times as likely* to want a visit from radio station personnel at work.
- They are *twice as likely* to use radio advertising to make purchase decisions.
- They have *double* the time spent listening as a non-club member.

These women respond to air personalities, they enjoy contests, they listen to your advertising, and they have an inordinate amount of time spent listening. Find them and market to them. They are extremely valuable.

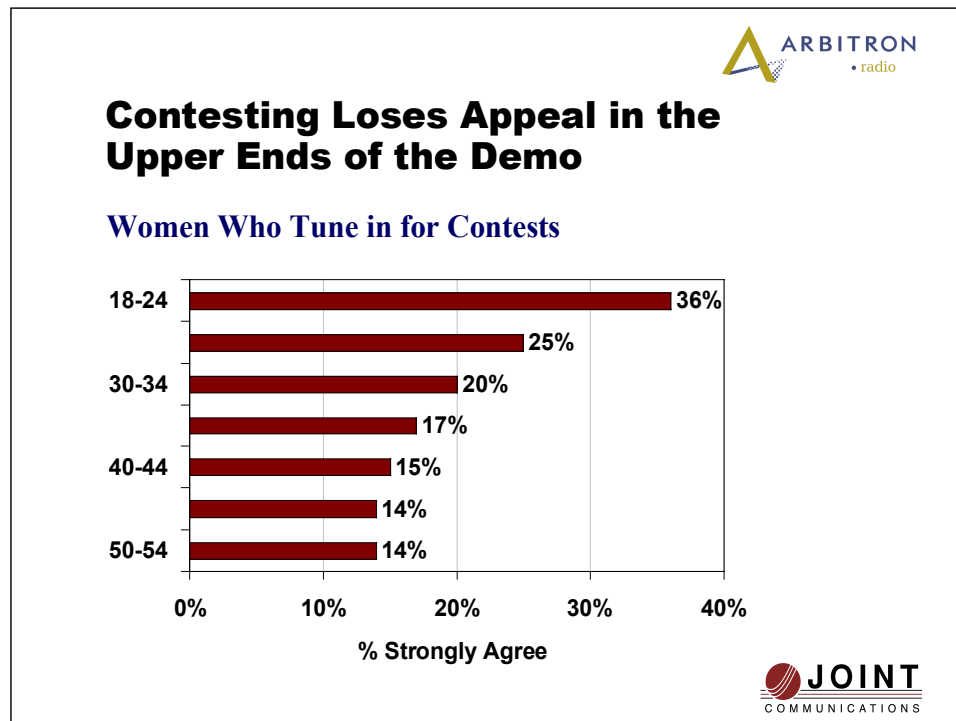
**15. Women say that *the best* way to find out about a radio station is hearing about it from a friend. Television is a close second.** Seventy-six percent of women said that the best way to hear about radio stations is from a friend. Women trust their friends to make recommendations; the credibility of a reference cannot be underestimated. Stations must find ways to motivate women to “tell a friend.”



**16. Nearly 40% of women never want any contesting.** Contests are very polarizing across all formats. Almost 40% never want any contesting, not even for entertainment value. Fewer than a quarter (23%) strongly agree that they enjoy listening even if they don't play.

Only 11% of women have listened to the radio "specifically to win" something. Of the ones who have won, most have won more than twice; 25% can't even remember how many times they have won, which suggests that these might even be serial contesters.

Contests are most attractive to 18- to 24-year-olds, who are the most likely of any age group to find them entertaining and want to win something.



**17. Less than a third of women who were contacted by the station to play a contest actually listened.** Eighteen percent of all women diarykeepers had been contacted and asked to listen to the radio for a chance to win something. Of this group, less than a third actually listened to participate in the contest. In other words, 7% of *all* women listened to the radio for a chance to win something as a result of being approached by mail or on the phone.

## Recommendations

1. **Carefully plan your contesting when targeting female listeners since it can be a tune-out factor as well as a tune-in factor.** Since almost 40% of women want no contests, make sure you are doing entertaining contests if you are doing them at all. And consider a position that has no contests as part of an overall “less clutter” position, keeping in mind that the further away a diarykeeper gets from age 18, the less interested she is in contesting.
2. **Target women at work, and understand that they are responsive to direct appeals.** The working women who listen are responsive to contact from stations in the form of contesting, station visits and frequent-listener clubs. These women are valuable since they have a tremendous amount of TSL and they use radio to make purchasing decisions. They are an audience that will truly listen, so do not miss any opportunity to speak to them. The caution here is that your competition will be targeting them too, so you must be unique in the way you engage them.
3. **Watch out for the Internet.** Even though the Internet can be a useful tool for your listeners, almost a third of all diarykeepers don’t access the Internet. Among those who access the Internet, the majority do it from home rather than work. So, if you’re using the Internet as an at-work contest hook, you are leaving a lot of your audience out. Reconsider some of the old technologies such as fax and postcards as well as direct-mail pieces if you want to make sure everyone has a chance to connect with your station.
4. **Rethink spot loads.** How do you handle commercials at your station? They are an enormous tune-out factor for women of all ages. Women tune out for irritating commercials, too. Remember the value of good creative. And remember that low-commercial and commercial-free satellite radio is coming.

Don’t shrug off this finding. Many programmers and managers tend to fall back on an “it is what it is” viewpoint. They know they have to run commercials so they just say, “We’ll have to take what we get.”

Female diarykeepers told us that you should redouble your brainstorming efforts to figure out new ways to make commercials better and reduce the number. Companies that put time, energy and effort into this area will reap big rewards.

5. **Think about how to make your station more kid friendly.** This is a tough one since, after all, the moms are adults, and it is difficult to strike a balance between what moms like and what kids like. Just keep in mind that if she is listening at a time of day when she might be with her kids, she will turn the dial if she hears something offensive.

These diarykeepers might be a “canary in the coal mine”—warning radio to rethink community responsibilities. Any radio group should consider doing focus groups with Women 18-54 and asking them about how to create radio that is more friendly to kids while still meeting adult needs. Remember, even 18- to 24-year-olds with no children think radio should be more kid friendly.

6. **Muzzle rude announcers if women are your target.** There will always be a group of women who tune to formats and enjoy rude announcers, but the majority don't, regardless of their age. There's a big difference between "rude and offensive" and "risqué." Some listeners will enjoy edgy humor that pushes the boundaries a bit. However, even among this group, rude announcers are a turnoff. Female diarykeepers seem to have a lower tolerance for this type of announcer than males.
7. **Never underestimate the power of recommendation from your listeners to their friends.** This merits a serious brainstorm. Diarykeepers told us that the best way to reach them was by getting a recommendation from a friend. Years ago, many radio stations took the easy way by creating "tell a friend" contests and then the fad petered out. It's clear that this is worth thinking about again. However, when you try to motivate their friends, remember that they are pressured for time, have very mixed feelings about contests and like to keep things simple. Your brainstorming may even turn up a way to motivate friends without turning it into a contest.
8. **Give them their favorite music and identify songs and artists much more than they get now.** Most music stations focus on playing the right songs. Keep it up. However, figure out a way to identify more often than you do now.

There is historical diversion among programmers to identifying songs. They think it slows down the radio station and clutters it up. Yet, 55% of female diarykeepers "strongly agree" that radio stations should identify songs and artists more often than they do now. This is another brainstorming area. Get your team together—try to figure out a way to identify songs more often without stopping the flow.

9. **Consider a "no contest" position.** Thinking contrarily may work for you. A full 40% of all female diarykeepers don't want contests, tune out when they hear them and don't even enjoy playing along.

If you do contests, they should be entertaining in the briefest possible time, because only one diarykeeper in 10 has listened to the radio specifically to win something. And among this small group, most have won more than once, suggesting "professional contesting."

10. **Broaden your "at-work" strategy.** Among women who listen to the radio at work, over a quarter (26%) have been contacted and asked to listen to a radio station to play a contest. Of this group, almost half (47%) tried. In other words, you and your competition are using the same tactic: trying to get women who work to play contests. And it's having a certain amount of success. However, this suggests that targeted at-work contesting is likely to become a neutralizing tactic rather than a growth tactic as more radio stations follow it.

It might still be important to your at-work strategy. However, brainstorm new ways to reach these listeners who want to connect and engage with your radio station.

## About Arbitron

Arbitron Inc. (NYSE: ARB) is an international media and marketing research firm serving radio broadcasters, cable companies, advertisers and advertising agencies in the United States and Europe. Arbitron's core businesses are measuring network and local market radio audiences across the United States; surveying the retail, media and product patterns of local market consumers; and providing application software used for analyzing media audience and marketing information data. Arbitron Webcast Services measures the audiences of audio and video content on the Internet, commonly known as webcasts. The Company is developing the Portable People Meter, a new technology for radio, TV and cable ratings. Arbitron's marketing and business units are supported by a world-renowned research and technology organization located in Columbia, Maryland. Arbitron has approximately 750 full-time employees; its executive offices are located in New York City.

Through its Scarborough Research joint venture with VNU Media Measurement & Information, Arbitron also provides media and marketing research services to the broadcast television, magazine, newspaper, outdoor and online industries.

## About Joint Communications

Joint Communications Corp. is considered a global leader in media strategy, marketing and consumer trends. For 25 years, it has helped a distinguished roster of clients to achieve remarkable success. They have included VH1, *Rolling Stone* Magazine, MTV, Wendy's, S.C. Johnson, Molson, CBS, NBC, ABC, Bryan Adams, major record companies and hundreds of radio stations in the United States, Canada, Australia, Europe and South America.

Joint Communications specializes in identifying, capturing and keeping audiences. They do it through sophisticated market research, formatting, marketing and promotion.

CEO John Parikh co-created a successful show for NBC television as well as creating national radio hits for *Rolling Stone* and NBC Radio. Most recently, he put his talents to work in helping to engineer the rebirth and extraordinary success of VH1.

Parikh is author of *The Baby Boom: Making Sense of Our Generation at 40*, based on the most extensive study ever done of boomers as they turned 40. He earned his master's degree with media guru Marshall McLuhan and studied for a Ph.D. in language and perception.

Parikh has been interviewed extensively on radio, television and in magazines for his opinions on what people want and why they want it. He shares his insights in his popular *Radio & Records* column, "The Competitive Edge."

Widely recognized as a futurist who helps his clients become even more successful, Parikh says, "There is a New Entertainment Economy emerging. It's all about control, connection and convenience—a daring tug of war between consumers and creators, between the distributors and the dissatisfied."

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