MUSIC RESEARCH

THE

SILVER BULLET

TO

ETERNAL SUCCESS

National Association of

N/AB

BROADCASTERS

MUSIC RESEARCH

The
Silver Bullet
to
Eternal
Success

Tom Kelly

National Association of
NAB
BROADCASTERS

MUSIC RESEARCH: The Silver Bullet to Eternal Success

Dedications

To Dad for your pragmatism, Mom for your passion, and both for your wisdom from experience.

To God for helping me keep my priorities straight.

To Jerry, Ed, Meg, Suzy, Mimi, Billy and Paul for being tight yet diverse siblings.

To my wife Sheri, and daughters Jaclyn and Kristen. You are the story of my life.

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Introduction

HOW DID I GET HERE?

A book about research? How boring! Stamp collecting and bird watching are more invigorating. If this book were about research, you'd be asleep by now. Hell, I'd be asleep. No, this book is not about research. This book is about people: specifically, *Radio* people and the extended family who make *Radio* click. In a relatively short time, Research has changed the radio industry and affected the careers and lives of many people. In this book, through the eyes and memories of many contributors, I will examine where we were, where we are, and where we might be going. When I was asked to write this book, I knew what I had to do. I had to get to the pioneers and include them.

When I entered *Radio* in the 1970s as a disc-jockey, it was still "free-form" at most stations. The jocks still decided what to play and how often, so long as it was in "the format." The only feedback we received from listeners was from the request lines and at various station promotions. The idea of formal market research was new. In fact, there were only a few researchers pioneering the new field of music listener opinion studies for the radio industry. But those original pioneers opened our eyes to new ways of using information to propel radio stations to greater success. Joe Chairs, former President of Outlet Communications once told me, "Pioneers take all the arrows." It takes tremendous courage to subject yourself to the risk, criticism and ridicule typically associated with developing anything new. Hence, pioneers need strength in their convictions and see what few others appreciate.

To explore the development of music research properly, I relied on the cooperation of the *Radio* pioneers I've come to respect most including the perspectives of radio Owners, General Managers and Program Directors. These experts include Consultants, Syndicators, Marketers and Record Label executives. In addition, there are Publishers and Editors of *Radio s* trade publications who observe and report the evolution of a rapidly changing industry. And finally there are the Researchers themselves, whose experiences and contributions have helped to shape my views, hone my craft, and build my career.

I've always had a passion for music and a fascination with *Radio*. When I was a 12 year old growing up in Philadelphia, I would sneak my AM transistor radio into St. Matthias

school so I could listen to music on WFIL during class. The radio fit nicely into my sport coat's side pocket. I concealed the earphone wire in my coat sleeve like a secret service agent. I was captivated by radio but never good enough at hiding it. That year, the nuns confiscated my radio three times.

At 13, I heard John Lennon interviewed on WFIL one afternoon. I hustled to the station's back door and waited for him to emerge. As WFIL disc jockey "Banana" Joe Montione escorted Lennon to his limo, I was rewarded with a handshake from my favorite Beatle and I was galvanized.

At Villanova University, I joined the campus radio station, WKVU. Before long my friends and I were running it. In 1978, I hosted a 5-day radio marathon to benefit the MDA and set a new collegiate record for a continuous broadcast. With a healthy dose of determination and creative persuasion, we garnered on-air support and interviews with Philadelphia Radio disc jockeys Sonny Fox, Bob Leonard, Sean McKay, Maureen Flaherty, and WABC New York's George Michael. TV news personalities Larry Kane, Al Meltzer, Don Tollefson, and Steve Levy participated, as did Philadelphia Eagles Ron Jaworski and Bill Bergey. We also convinced Hollywood celebrities to help us with phone drops and interviews, including Robin Williams, Phyllis Diller, Ed McMahon, Dione Warwick, Judy Landers, Paul Michael Glaser and David Soul among others. We raised thousands for MDA and created an impressive broadcast event despite the limitations of being amateurs at a carrier current AM station.

After college, I put my accounting degree to work at 7Up, but recognized rather quickly that my heart was in *Radio*. Chris Gable gave me my first shot. I packed my van and moved to Charleston, West Virginia to work for Chris, Lynn Martin and Jack Linn at WKLC. I relished my initiation into *Radio* with the likes of Doug Burton, Chuck Geiger, Lee Michaels, and most of all, Randy Schell, who still has the best pipes in the business!

Seven months later, Lyn Corey brought me to WZZO Allentown to work with Arthur Holt and his family, Gordon, Cinda, and Carlton. We didn't realize it at the time, but the WZZO staff was destined for bigger things. Gene Romano, Rick Strauss, Bruce Bond, Joan Edwardsen, The Bearman, Mark O'Brien, Kevin Malvey, Steve McNee, Dave Richards, Robin Lee to name a few, came from that fertile breeding ground.

In 1985, George Harris, another WZZO alum, was about to make the transition from Program Director of WMMR Philadelphia and KMET Los Angeles to consultant. I joined George to open the doors of Harris Communications and before long, we became Rock's premier consultancy with clients like WNEW, WMMR, KMET, WLUP, KRQR, KGON, DC-101, WIYY, KTXQ, and WLLZ.

Then came the big leap. Having done both, I've learned that it's a lot easier to throw yourself out the open door of an airplane at 15,000 feet than it is to quit a secure job and start a new business. In 1991, Kelly Music Research was born and within a few years we conceived, delivered and patented a brand new music research methodology for *Radio* called the *Living Room Music Test*. Our mission is simple: to help radio stations attract more listeners, achieve higher ratings, and make more money. So far, it's working.

I'm particularly grateful for the thoughts and insights from the many *Radio* experts I interviewed for this book. From original pioneers to the troops still on the front lines, their contributions are a significant portion of this work. Their experiences, ideas and projections are indispensable. The pioneers are the heroes. They are leaders and champions who light the way for all who follow. As you forge ahead, listen carefully to the pioneers. You can't fully appreciate where we're going unless you understand where we've been.

The Sacred Cow Picnic

In my twenty five years in *Radio*, I have observed that as in life, the only certainty is change Change happens at varying speeds and few would argue that the radio industry has experienced more change in the last five years than in the preceding twenty. What about the next five, ten, twenty years? Make sure your seatbelts are tightly fastened.

If you are already in *Radio* and planning to continue, or are considering it as a career, you'll need to stomach some turbulence. For years *Radio* chugged along, entertaining the audience as a small business enterprise often owned by families or individuals. Staffs consisted of passionate music experts, golden throated announcers and vagabonds willing to work for very little pay. Now, everything is changing. Since deregulation, *Radio* is experiencing a true paradigm shift. Just twenty years ago, the largest radio companies operated under ownership limits that were restricted to twelve AMs and FMs. Since deregulation and the consolidation buying sprees of the late 1990s, *Radio s* small business has catapulted into a genuine Wall Street concern. As we turn the century, there are several broadcasting companies with over one hundred radio stations. Some are poised to crack the 1,000 station barrier. Not only are station rosters growing, the mega media companies are also acquiring networks, syndicators, internet, billboards, marketing firms, production houses, consultants, researchers, publishers and any other product or service that relates to *Radio*.

Deregulation created a feeding frenzy that shifted *Radio s* big players into "acquisition mode." Companies like Clear Channel, CBS, Cumulus, Entercom, Emmis, Citadel, Journal and many others have devoted significant energies and resources to building their war chests. It reminds me of the "Monopoly" games we used to play as kids. My cousin Alvin would spend the early part of the game buying every piece of real estate he could get his hands on. When his cash was gone he'd borrow more from the bank. Then he'd work loans on the side with the other players – anything to finance his next acquisition. The Monopoly game would sometimes go on for days but the result was usually the same – Alvin won.

There's an old saying that applies to the speed at which major broadcasting corporations change operationally: "Big ships turn slowly." This is still true, but given the opportunity, there is one thing big ships can do quite rapidly: GET BIGGER! While the big, bigger and biggest broadcasters have managed to adjust their operational stride on the run to

accommodate their new corporate girth, eventually they will need to return to an "operation mode" to maximize their newly acquired assets. With the ongoing evolution of *Radio* coinciding with emerging new technologies such as computers, internet and satellite, there will be no mistaking the new frontier for your father's radio landscape. There are no maps yet. The roads haven't been built. The internal governments that oversee the stations, clusters, regions, territories and global markets are still being defined. At times it's going to feel like a roller coaster ride in the dark – a real life version of Disney's *Space Mountain*.

EMBRACING CHANGE

The economics and influences within *Radio* are changing, yet many of the goals remains the same. *Radio* is vying for the attention of consumers. In pursuit of listeners, the question is often raised, "What does the market want?" which is where Market Research enters. With a new paradigm the questions are becoming more complicated. There are fewer situations where a stand-alone station is competing with all of the other stations in the market. *Radio* is becoming less like individual competition and is evolving into a team sport with former competitors now on the same team working together to succeed on a much larger scale. Players must not only peacefully co-exist, but they must develop strategies to help the entire team advance.

With *Radio s* evolution underway and the emergence of new technologies, research is changing as well. The need for listener opinion and information is greater than ever, but many of the old methods for gathering opinions no longer make sense. The traditional Auditorium Music Test (AMT) methodology is on its last legs in many markets across the country. AMT's were once a revolutionary mode of transportation but are starting to look more like the horse and buggy as we begin the next century. While some *Radio* and *Research* veterans still cling to AMT's, listeners are growing resistant to the inconvenience of "out of home" research. Listeners' lifestyles are busier. Between careers and families, there are more demands on their time. So when their day is finally over, the new laws of research physics take over: "A listener at home tends to remain at home." Increasingly, the audience is working at home, shopping from home and having meals delivered to their door. The idea of going out to participate in an AMT for a few bucks hardly seems appealing. So we need new ways to reach the audience, new ways to ask more direct questions and a new way of thinking to make each radio station a precision instrument for capturing the attention of its target audience.

Whether you are a salty industry veteran or a newcomer, I hope you'll read this book and come away with an understanding of how *Radio* and *Research* are changing. Many changes are still relatively recent and more is on the way. We'll examine history, mistakes, assumptions, anecdotes, repercussions and predictions for the future – not only through my eyes, but through the minds of some of the brightest stars in our industry. A roster of these contributors is included as an appendix. Read that appendix to understand how these stars got involved in *Radio*.

If we are to progress, we must be willing to change. But change is never easy. It's less risky to slide into a comfort zone – a cushy routine of sameness that helps us feel more secure and in control. If we're not careful, that complacency can become a rut that gets deeper the longer we stay in it. It's a self-destructive frame of mind that diminishes expectations of others and ourselves.

Change is simple, but not easy. But now is not the time to stop pedaling up the hill. We're surrounded by changes that will affect everything we do: consolidation, internet, satellite and digital audio to name a few. Change often requires us to look at our own years of hard work and experience as simple memories of a time gone by. Resistance to change is poison to our livelihood. In order to thrive, we must continually seek opportunities for advancement. More often than not, that quest takes us outside our world as we know it today.

MUSIC COMES FIRST

What's the number one reason a listener chooses a favorite music radio station? Ask radio listeners anywhere to prioritize their criteria and the answer will always be the same: "The station must play songs that I like." In every perceptual study I've seen, THE MUSIC is the single most important element on any radio station. Sure, there are other things on the list such as a good morning show, few interruptions, entertaining personalities, good contests, community service, etc. And there are a few instances where music is successfully put aside for other programming elements. But generally nothing ever comes close to music selection as priority #1.

The economies of *Radio* dictate that the stations attracting the biggest audiences win. More listeners attracts more advertisers, higher rates, revenues and profits. It's a pretty simple formula. The listener is the fuel that propels the money rocket. A common mistake many operators make is to forget the importance of music. They become so occupied with all the other aspects of the station – jocks, promotions, marketing – that they forget the listeners' priority. Even though audiences demand better music, many stations disproportionately allocate resources to other areas. Too little time and too little money is spent on the one thing that can have the biggest impact on a station's popularity and profitability – the primary product – the music.

REDEFINING STANDARDS

Our lives are filled with self-limiting beliefs – what I call "sacred cows." Sacred cows have been around forever. In any given moment in time, a sacred cow is a universal truth. For example, "The world is flat;" "If man were meant to fly, he'd have wings;" and "No athlete will ever run a mile faster than 4 minutes." For years it seemed impossible for anyone to threaten Babe Ruth and Roger Maris's home run records in baseball. Then, in 1998 and 1999 Mark McGwire and Sammy Sosa shattered the long-standing single season home run marks. Two players, two seasons in a row. Clearly, a new standard had been set. The bar has been raised with new expectations for achievement.

Unfortunately for pioneers, many people resist change. It's easier to accept obstacles as impenetrable barriers. You'll hear sacred cow worshippers say things like, "If it ain't broke don't fix it" or "We've always done it this way." In any business, including *Radio*, there are plenty of self-proclaimed creative types who consider themselves to be on the cutting edge. However, when faced with true innovation, many freeze and fall back on the sacred cow.

LET THE IDEAS BREW

Most of us have been faced with the opportunity to present our boss with an idea or a proposal that he or she may think is absolutely ridiculous. I always thrived on coming up with new ways to accomplish tasks. In fact, I would look forward to walking into my boss's office to present my brand new ideas just so I could watch his face contort with perplexity. He or she would invariably respond with something like, "How the hell did you come up with that?" Then he/she would chant a sacred cow mantra, "We've never done that before."

As a 15 year old bus boy at the General Wayne Inn, before single serving coffee bags were invented, I emptied tea bags and re-filled them with coffee so customers at the end of the night wouldn't have to drink freeze dried instant coffee. The late diners were forced to drink the powdered crap because the restaurant wouldn't let us make a whole pot of coffee at the end of the night for the last table or two. The customers didn't appreciate following lobster or fine veal with campfire coffee. My solution? Brewed coffee one cup at a time. The customers were happy and the restaurant didn't waste coffee. My manager thought it was a dumb idea. One of the customers probably secured the patent.

UN-POPULAR

While at Villanova, I put my accounting degree to work 3 days a week at 7Up as an internal auditor. The marketing guys from the home office came into Philadelphia to show off the new 7Up TV spots. In the soft drink race, 7Up was a distant third behind Coke and Pepsi. The popular marketing campaigns for Coke and Pepsi at the time featured sports celebrities drinking their product. 7Up countered with the exact same type of spot featuring the Dallas Cowboys' Tony Dorsett and rising tennis star John McEnroe drinking 7Up. How original (yawn). The marketing big shots asked us worker bees what we thought and then puffed out their chests in anticipation of huge accolades. After the initial round of "I think it's great sir!" responses from my colleagues, I couldn't contain myself. "I don't like it," I started. "7Up is different from Coke and Pepsi but these spots do nothing to distinguish our product from theirs. 'Uncola' was better than this!" They almost swallowed their cigars. How dare this 21-year-old punk accountant criticize their multi million dollar marketing campaign!?! At the time, there was a potentially powerful position that the marketing guys were ignoring. There was one distinctive claim 7Up could make that neither Coke nor Pepsi could – "Caffeine Free" – but it was never mentioned in 7Up's marketing campaigns. Some savvy moms and pediatricians had figured out that the caffeine in Coke and Pepsi were making their kids extra hyper-active,

so they served them 7Up which had always been caffeine-free. I brought this up to the marketing maestros and went on to suggest a campaign that unveiled the evils of caffeine. Picture caffeine drugged kids bouncing off the walls, turning loving moms into lunatics. It was extreme, I admit, but I thought product differentiation and pointing out benefits might work. Nice try. After hearing me out, the sacred cow disciples cautioned, "Don't rock the boat." They patted me on the head and sent me back to my cubicle to sit quietly and audit. Two years later Coke introduced "Caffeine Free Coke" and touted the parental benefits of their innovative new drug free soft drink. 7Up finally decided it was time to mention it in advertising but by then 7Up had lost its unique advantage.

NO MUSIC, ALL HOWARD

Probably the best industry example of a sacred cow being successfully challenged is with the introduction of Howard Stern. In the early '80s, Dwight Douglas was my consultant from Burkhart/Abrams while Howard Stern was doing mornings at DC-101 in Washington. After a stop in Washington, Dwight visited me and played a Howard Stern aircheck for me. I laughed uncontrollably. Then Howard would play a song. After the song, Howard would be hysterically entertaining, and would then play another song. The "sacred cow" at the time called for music stations to play music in every daypart including morning drive. Dwight Douglas wanted to kill that sacred cow as did Howard. The songs Howard was playing in morning drive were top tested favorite tracks from core artists, but the music was making the show less entertaining. Howard Stern became so good that his audience considered their favorite music an annoying interruption. This experience proved that the assumption that music would always be priority #1 at music stations could be challenged. An air personality as compelling as Howard Stern could make listeners disregard the station's music format in other dayparts.

Howard Stern has been responsible for killing several of *Radio s* sacred cows. In the mid-1980s the sacred cow was that morning shows had to be local to succeed. Mel Karmazin and Howard Stern saw things differently, believing that a superior quality product would win on its own merits. Some of the most respected experts in the industry insisted that simulcasting Stern's WXRK New York morning show on WYSP Philadelphia would be a quick failure. Less than a year later Howard was well on his way to conquering Philadelphia and has repeated his morning show dominance in markets across the country ever since. Along the way, he's opened the door for other nationally syndicated personalities: Mark and Brian, Bob and Tom, John Boy and Billy, Bob and Sheri, Manccw, and many others who bring better morning shows to affiliates. What did we learn? Some listeners care more about Good than Local. Another sacred cow bites the dust.

GETTING OUT OF THE GUESSING GAME

Less than 30 years ago, the idea of any type of audience research was unheard of. Not that the industry didn't need it. Lots of time and energy were wasted without it. Programmers at some of America's largest broadcasting companies pontificated and

debated for countless hours every week over whether or not to add certain songs. Without the benefit of audience research, the decision-makers had to rely on their own gut instincts, which often turned out to be incorrect.

> **Bob Henaberry:** There was a question at ABC that raged through the summer and fall of 1971. Believe it or not, among a handful of very intelligent people, the question was whether or not the "Theme from Shaft," by Isaac Hayes, was a song that was appropriate for a progressive radio station. It was interesting how the votes came down and who ended up being "correct." But an awful lot of pain and blood was spilled over that issue which could have easily been resolved by some sort of prudent research.

Broadcasters who embraced research first seemed to have mystical powers. While music research was crude initially, it quickly exposed the flaws in the armor of those operating without it. As pioneering broadcasters poured research into the mix, ratings would rise and long standing market leaders would fall. Stations who were incorporating the opinions of listeners discovered that some information is better than no information. Even a little market knowledge enabled lesser competitors to capitalize on stations still in the dark about research.

> **Carl Gardner:** I remember a time when almost nobody was doing research. It was this magic voodoo that a few broadcasters had. I worked for a guy like that for a while in the early '80s - Tony Brooks at Sandusky Radio. He had a Midas touch for a period of years. We kept buying rock stations and he would get his hands on them and they would become #1 overnight. He had this incredibly mysterious formula that included doing a music test and then advertise a station on TV. Everyone was trying to figure out what it was about Tony that let him take these stations to the top of the market all the time. He was a very bright and gifted guy, a terrific broadcaster. These are tools that at that time were rare and today are quite common place.

Venturing into unknown territory is never easy. The most difficult step is always the first one. Looking back, many radio people can only shake their head at their own apprehension about music research and wonder why they didn't move sooner.

> **Dan Vallie:** Back in the late 1970s, I was one of the many young broadcasters that didn't originally buy into the concept of music research. I was one of the many that said things like "you can't research art and creativity" and "you can't determine if a song is a hit by playing 7 seconds of a hook down a phone line." I soon learned that it was a valuable tool. The more I used it the more successful I became. After debuting B-97 in New Orleans at number one 12+ and every significant Arbitron demo in spring of 1980, I never ran a radio station without music testing again.

A BRAVE NEW WORLD

It's easier to think and act like a pioneer when you're young, carefree and single. The worst thing that can happen is you get fired. No big deal. But with age comes family,

responsibility and complacency. And if you risk your credibility with pioneering ideas, you see potential career damage, and when your family is counting on you, the prospect of losing your job is a very big deal. And the sacred cow becomes more attractive. Even though it doesn't come from the heart you may find yourself saying, "I think the way we've always done it is just fine, J.B." and collect another paycheck.

It's comforting to see sacred cows slaughtered from time to time. Remember these? "No one will pay for cable TV as long as the networks provide it for free;" "Home shopping won't work because people can't touch the merchandise;" and "The Internet will be nothing more than a haven for a bunch of computer geeks." I dealt with a sacred cow when I introduced the *Living Room Music Test*, taking programming research out of the auditorium and into the listeners' homes: "You can't get good research if you can't see the people doing the survey." After six years of Living Room Music Testing and many ratings increases, the skeptics are beginning to come around to a new way of thinking about the way we do research. When a sacred cow gets turned over, it restores my faith in man's ability to keep an open mind.

I suspect you are worshipping some sacred cows of your own. Take a look around. See any self-limiting beliefs that just don't feel right in your gut? Maybe what your gut needs is a sacred cow sandwich. Dig in! Kill the sacred cow and you'll see clearer, work smarter, and feel great!

Quick Fix Silver Bullets

· Resistance to change is poison. Think outside the box to keep up with a dramatically changing radio industry.

· New opportunities will emerge as ownership shifts from "acquisition" to "operation" mode.

· As *Radio* evolves from an individual to a team sport, the playing field is growing but the objective is still to satisfy the listener.

· In many markets the Auditorium Music Test method no longer works. New laws of research physics apply: "A listener at home tends to remain at home."

· Music is the listeners' top priority on a music station. Don't underestimate the power of the primary product.

· Sacred Cows are self-limiting beliefs. Be like McGwire, Sosa and Stern. Set new standards.

· Increase your odds by eliminating the guesswork. Gut decisions can take you far off course.

· Have the courage to be wrong in your quest to be right.

Power of the Silver Bullet

Radio stations compete for first place in the consciousness of Arbitron diarykeepers. Listeners who participate in the Arbitron diary process are asked to write down the radio stations they listen to during the course of a day along with the place and time spent with each station. Since listeners don't have to carry their diaries with them every minute, they may record their listening at the end of the day. When this happens, respondents are reporting *recalled* listening. Hence, they may ascribe more credit in their diary to a favorite station, also known as their "P1" station for first preference, and potentially report less or no listening to a station that is a secondary choice (P2) or hasn't firmly established itself in the mind of the diarykeeper. Over the years, diary reviews have revealed as much as 80% of listening reported in a diary attributed to the P1 radio station. The remaining percentage is typically divided among a half dozen or so secondary and tertiary choices. The result of more reported "mentions" in the diary and longer "time-spent-listening" (TSL) is big ratings and big revenue opportunities for the station. If a station is able to achieve P1 status and "top of mind awareness" with an Arbitron diarykeeper, it can dominate the diary. With enough P1 listeners, the station then dominates the market.

The impact of getting mentioned in just a few more diaries can be significant. *Radio* revenues are based on ratings, and the difference made by a few tenths of a point can equate to hundreds of thousands or millions of dollars in annual advertising revenue. And with multiples of revenue and cash flow as the basis for determining station value, those few tenths of a point may mean 10 million dollars in market value.

With so many choices available to the listener, the competition for P1 and "top of mind" begins and ends with the product – starting with the music and including everything that happens around the music. A station with well researched music, strong positioning, entertaining personalities, and solid marketing is doing everything it can to put just enough distance between itself and its competitors. And a slight margin can make a tremendous difference.

TIP THE SCALES IN YOUR FAVOR

Two *Radio* CEO's on an executive retreat in the wilderness are hiking through the woods. They round a bend and stumble upon a large grizzly bear and her two cubs. As the bear

angrily moves toward the hikers to protect her cubs, one CEO calmly reaches into his pack and pulls out a pair of running shoes. Frozen with fear, the other CEO says, "You're never going to be able to outrun that bear!" With confidence, the wiser CEO pulls his laces tight and replies, "I don't have to outrun the bear. I just have to outrun YOU!"

Radio is a game of inches. Precious little separates survivor from prey. Music research for many radio stations is the pair of running shoes that provides the competitive advantage to thrive. If a radio station can achieve even a slight advantage in the mind of the listener, it can own his or her diary. Likewise, a station that achieves top position in the ratings can control market revenue!

KEEPING ONE IN THE CHAMBER

Carl Gardner commented, "We're always looking for a silver bullet - looking for the answer that's going to solve our problem." Successful radio operators realize that there are many tools and weapons necessary to win in today's increasingly competitive marketplace. The product on the air, especially the music and everything that happens in between, must be the best. The product must be well targeted, directed, and executed and needs the support of strong promotion and marketing efforts. But it all starts with an understanding of what the audience wants in the first place, which is where music research comes in. Music research is your silver bullet. If aimed and fired accurately, it can deliver a quick-fix to an under-performing station. Incorporated into long-term strategy, the silver bullet can ensure eternal success.

How much more advertising revenue would a single rating point increase deliver in your market? $200,000? $2,000,000? More? What would it cost to lose a single rating point? The investment in a good silver bullet is pennies on the dollar compared to the potential return or risk. Whether you employ the silver bullet as an offensive weapon or you use it to defend what you've earned, you'll sleep better just knowing it's in the chamber.

PROTECTING THE INVESTMENT

Owners understand the financial risks and rewards in operating radio stations. However, they sometimes have difficulty communicating to passionate young programmers and disc jockeys that the station is not a playground or someone's personal sound system. Leaving music programming decisions up to the discretion of someone without the benefit of music research can be costly. It may seem harmless on the surface to play some songs the audience doesn't like, but when it comes to ratings, revenue and balance sheet implications, every mistake is magnified. When you evaluate the numbers, research should help you build market share and protect you from losing value.

> **Joe Gallagher:** In terms of cost and benefit, it's a big issue. I go through it all the time. Do I really need to do research? If I don't do it, what happens? Let's say that a music research project costs $20,000 and your market is not a big one. You've got $10,000,000 of *Radio* revenue in the market. That would mean that each share

would be worth around $100,000. If you're doing music research and can add 2 shares to your current ratings, that's equivalent on paper to $200,000. I can operate at a 35% margin so that would translate into $70,000 to the bottom line. If I put $70,000 to the bottom line in today's market, with multiples anywhere from 8-12 times cash flow. That $70,000 now becomes $560,000 to $840,000 in station value! Is $20,000 up front worth an $800,000 return on my investment? The answer is obvious, but we don't always come to it that quickly. Sometimes, I have to go to the other side of the coin. What about the inverse? Is it worth $20,000 to keep from losing 2 shares or $800,000 of a station's value? Like the stock market, what we're talking about is paper value. But it is real because if you can convert your ratings to revenue, inevitably, it's going to the bottom line. And profit impacts the value of the station immediately. We bought WZXL, Atlantic City, for $1.8 million, applied some research, changed the format and debuted with a 16 share. We converted the ratings to revenues, which flew to the bottom line and we sold it in 2 years for $4.5 million.

Like insurance, you may not enjoy buying music research, but it's a very smart investment. Radio station owners are most interested in the financial performance of their stations. In many cases, what's on the line for the owner includes every penny of accumulated savings, second mortgages on real estate, and liens on every possession including those of the spouse, children and dog. The financial success of a radio station for the owner is dependent on its ability to deliver a product suitable for its intended target audience.

Dave Gariano: For the amount of money that is invested in these properties, I want to be able to insure that investment. I need confidence in what we're doing. I think research is essential in the business model. I can't imagine not using it!

ADVANCING YOUR POSITION

There are times when ownership and management need to be convinced that an already successful station can perform even better with research. Very few stations have programmers who possess instincts for reading the potential audience without research. When a station is reasonably successful without research, there is a temptation to leave programming decisions to the PD's discretion. But leading stations are sometimes ahead because the competition is weak. If that is the case, the market leader may be vulnerable to a competitor who researches the market and introduces a product more in tune with listener interests. A better approach is to use research to repair potential weaknesses and advance or put more distance between yourself and the competition.

Gene Romano: We worked a couple of years at WDVE in Pittsburgh through the early 1990s without any research at all. At that time I had a library playlist of over 900 titles. While I pushed very hard to do research, the consultant and corporate people were of the opinion that we were doing great without research. Why fix what's not broken? I appreciated their believing that I had such a great gut instinct, but I knew we couldn't go very much longer and be successful without research.

Eventually we got it. After we finally started using research, we were able to turn WDVE that had been number 2 or 3, 25-54 adults into a station that for 7 straight years ranked number 1 with 25-54 adults, and number 1 with 18-34 adults - every single book. Clearly, there was no way we could have done that without any research.

In formats targeting a more tightly defined niche, such as Alternative Rock, listener interests change frequently. Without a broad base audience to fall back on, staying on top of trends and music styles is an absolute necessity.

> **Dave Richards:** We live and die by research. We really do. There isn't a year that I've been in *Radio* where halfway through the year someone hasn't said, "We may have to make some budget cuts." The two things that are suggested for chopping are promotion and research. If you took "x" number of dollars out of a promotion budget, you could probably survive. If you take away your research, certainly your music research for a chunk of the year, you could really screw up! We are sitting here in Chicago doing a radio station that is very unique. We provide three services: we're the entertainment leader, we're the rock leader and we're the alternative leader. Music changes so rapidly that six months after your last test, there can be a whole genre of music or a few clusters that have just burned out or don't matter anymore. Not long ago, Grunge gold was the most important category for us and that has slipped a lot. Music research is more than important. We have to have it.

There is a delicate balance to be weighed between art and science. Music is an auditory art capable of invoking extreme emotion. Finding the songs that weave a common thread among listeners is the science of research.

> **Larry Rosin:** Radio stations should use music research because music research works. And when done right, stations maintain their position. For a music based radio station to not at least have some information about how the audience is responding is risky, to say the least. I am a believer in the art of programming and believe there is creativity beyond what raw numbers can tell you. I'm also a believer that it doesn't hurt to find out what people think. Every time I trust my gut on things, I am surprised how insensitive I can be.

A QUICK FIX

In the world of modern marketing, a silver bullet is a weapon designed to deliver immediate positive impact on business. Typically, using a silver bullet means getting to the known customer base and doing something to generate an increase in the use of the product.

When we conduct music research, we are applying the silver bullet concept to programming. As Gene Romano puts it, "Going without music testing is like driving in the dark with no headlights on." The objective is to reach your customers – your listeners – and find out what it will take to increase the time they spend listening to your radio station. The goal is to offer

listeners a product that will keep them tuned to your station instead of switching to your competition. If you find out which songs keep your listeners around and those that make them punch away, you can efficiently alter your programming to maximize your audience. With a larger audience and longer time-spent-listening, you achieve higher ratings, deliver better results for your advertisers, and enjoy increased revenues.

THEY'RE ONLY LISTENERS

When I programmed WZZO, Allentown, in the early 1980s, some stations used research, but we didn't. My GM, Gordon Holt, was more of an artist. Gordon, as well as his father and station owner, Arthur Holt, were disciples of legendary radio programmer, Gordon McLendon. This was before the phrase, "If you build it, they will come" became popular, but that pretty much summed up Gordon Holt's approach. At times it felt like we were in an old Mickey Rooney/Judy Garland movie– you know "Let's put on a show!" And all the kids would build a set, make the costumes, convert a barn into a theatre, rehearse their lines, sing, dance, sell thousands of tickets and save the town! At WZZO, we didn't always sell all the tickets, but we sure had fun producing the show.

Gordon Holt taught us the importance of the "show" in show business. WZZO became known for introducing listeners (and staff) to skydiving, white water rafting, downhill skiiing, on-air beer giveaways, hot air baloons, ball games, outdoor festivals, theatre of the mind and anything else that might entertain the audience. Gordon enjoyed creating the spectacle, and he expected the audience to flock to our big top because it was the greatest show on earth! Like most creative-types, Gordon had difficulty accepting the idea of incorporating audience opinion into the product development process. What did steel workers know about entertainment? Nothing. But they were the customers. With increasing competition there really was no choice but to research the audience to keep the product in sync with them. Whenever the subject was raised that the radio station should probe the desires of the LISTENERS, Gordon would pause and sigh, "Oh...THEM!"

As we grew to embrace the benefits of purifying the music mix through research, we never lost sight of the importance of everything that happens between the records. After discovering music research many stations around the country adopted the "shut up and play the hits" philosophy. Meanwhile, all of us who graduated from WZZO learned that even though playing top-testing songs could give you the juiciest slab of beef on the plate, it was only the foundation around which the rest of the entrée is built. Anyone can get choice cuts. Presentation and ambiance makes the total experience more enjoyable. You need the right music to bring listeners in and a great presentation to solidify loyalty to the radio station.

A REAR VIEW MIRROR

In order to achieve successful business chemistry in *Radio*, the balance of instinct and information must be carefully controlled. If either element gets too far out of balance, the resulting explosion could be devastating.

Erica Farber: You can have all the data in the world. But what are you doing with that information? Is it the end-all, die all? I hope not, because you still want to have an element of freshness, an element of surprise, an element of moving forward. Research does a pretty good job of telling you where you've been. But I am not sure research can tell you exactly where you are going. What you hope is that with any information, it helps you provide a road map for moving forward and allows you to sometimes decide you need to veer a little to the left, right, up or down. It's interpretation of information and that's where the intelligence factor and the heart and the emotion come in.

Music research alone can only measure the past. It cannot predict the future. While research will reveal how listeners feel today about music styles and specific songs, it cannot tell you how an audience will react to something new in the future. Until it is brought to their attention, an audience cannot react. Projecting reaction to unknown quantities is, in the words of AOR format pioneer, Dwight Douglas, "a crap shoot at best."

Larry Rosin: One of the hard things about music testing is that there's no right answer. We are consultants to CBS and CNN on election night. The thing that is different from music testing is in an election, eventually the votes are going to come out and you can see how accurate your projection is, how close, how far, or in between. With music research, no one knows what the right answer is. There is no vote count that is going to come out to say how close your poll was to reality. We're all just sort of dealing with estimates on top of estimates.

FOCUS ON THE BULLS-EYE

Ongoing research will keep you tuned into the audiences' ever changing opinions and help you keep the station from veering too far off course. Also, by getting the music right you may earn credit from your audience for station attributes you may not deserve.

Bob Harper: As Bill Fingenshu at Infinity says, "Hey guys, it's only the product." You can't ignore the fact that in most cases people still connect with the radio station because of the music it puts on. People will credit a radio station with images and dimensions that we would professionally listen to and say, "That station isn't a fun station to listen to. There aren't any real good personalities." But if the music is right, the audience will say, "That's a great station, that's a fun station, that's an entertaining station. That's a station that I really like." They get credit for everything because the music is right. I think one of the things I have learned has been that we tend to minimize the audience's involvement in the music. They really come to *Radio* to have a musical experience. In a perfect world, we'd like radio stations to be programmed and run and put together by people who like the music as much as the listeners do. Now we've computerized everything and everything is on a list. The audience may say there are days when it just sounds "sad." The PD's reaction a bunch of years ago would have been to listen with that "sadness" more in

mind. Today, the PD's reaction would be to build a "sad" sound code into Selector. But that's not the answer. The answer is to listen to your station.

Radio is now competing against other media more fiercely than ever. New technologies are creating new distribution channels for music. The doomsayers are quick to predict Armageddon at the hands of webcasting, satellite and mp3. But just as video did not kill the radio star, neither will these. Make no mistake, the landscape is changing and anything that captures the attention of the audience and pulls them from *Radio* is a potential threat.

> **Erica Farber:** The sheer number of choices available to a listener is dramatic. And that's not just radio choices, but any consumer today is bombarded between *Radio*, television, cable, print and now the Internet. So everyone's vying for the attention of that individual. The more you can know about that individual, their likes and dislikes, is so much more important today than it ever has been. Just holding on to that person for an additional 15 minutes today has such a tremendous financial effect that it didn't have as little as 10, 15 or 20 years ago.

Since *Radio* has embraced music research it has been successful at solidifying the bond with listeners. By delivering a better product over the air, the radio industry has made it more difficult for a new competitor to swoop in and wreak havoc. The key to continued success is to nurture the relationship with the audience and give them fewer reasons to tune away.

> **Ron Rodrigues:** It is breathtaking to believe that *Radio* has held up as well as it has over the years, considering where else listeners could go. There has to be a reason for it. I don't think it is just by accident that people's time spent listening is holding up as well as it is. If you also consider the fact that most people are listening to *Radio* for music, you have to believe that music is better researched and has a stronger foundation of audience appeal than it ever had before.

FIRST TIME IS THE HARDEST

Many measure success relative to their own history, situation or expectations. "Our numbers always drop in the Fall," "We're up against a tough competitor," or "Finishing third is good enough" are common excuses to avoid perseverance. Some see an attempt at greater success as an admission of weakness, which is a shame. If you aren't ready to fail, you aren't ready to succeed. In fact if you're not failing, you're not trying hard enough. As hockey great Wayne Gretzky put it, "You miss 100% of the shots you don't take." The most successful among us achieve goals and immediately raise the bar for the next attempt.

> **Tom Evans:** When I was a consultant in 1994, we used the *Living Room Music Test* for a station that was already successful. The next book we saw the station jump 50 percent in their core demographics. This was a station of the opinion that they needed to play 20 George Thorogood cuts only because they always had. At first it

was hard to convince the staff that it wasn't necessarily what the audience wanted. With the research, they cut a lot of crap out of their playlist and focused the station. Time Spent Listening jumped. They weren't chasing people away with obscure music that just happened to be favorites of staff members. They were playing songs...here's a concept...that were favorites of the listeners!! Imagine that!

From time to time, someone will ask, "If I do music research, do you guarantee my ratings will go up?" People would love to believe the "silver bullet" would let them easily accomplish anything. "If I buy this hunting rifle, do you guarantee I'll bag a deer?" Sure. As long as you get up early, take the rifle into the right section of the forest, load it properly, and sit quietly. Then, assuming a deer wanders into your crosshairs and you keep a steady hand while you pull the trigger at precisely the correct instant, I guarantee you'll get a deer - unless someone else shoots it first. Hunters know. Even with a great rifle, it is not easy.

Buying the instrument doesn't guarantee you will be successful. You have to do many other things correctly to realize your goals. You could drift around at sea hoping that a fish might jump into your boat. Or, you could greatly increase the likelihood of landing a fish by investing in a fishing pole, tackle, and bait. Still no guarantee, but your chances are exponentially better.

For years, radio stations drifted around hoping listeners would jump into their boat. Some still operate that way. No rifle, no fishing pole, no music research, and no silver bullet. These stations are at a disadvantage in terms of competing against operators who have the right equipment. Investing in music research dramatically increases your potential for success. It's no surprise that the stations that have the silver bullets, and know how to use them, are hooking listeners by the school and bagging trophy ratings.

Quick Fix Silver Bullets

- In the Arbitron ratings game, stations with healthy P1 (first preference) status among listeners will fare better.
- Influencing just a few Arbitron diaries can equate to millions of dollars in advertising revenue and station value.
- Research can be the Silver Bullet that helps to dominate the market.
- The investment in research should be measured against increased profitability and vulnerability.
- Music is art, research is science. Finding the balance leads to success.
- The music has to be right and so does everything around the music.
- Research reveals the past, but cannot predict the future.
- The threat from new technologies for listener attention should remind *Radio* to stay focused on delivering a great product.
- Set your goals higher than before. Trying and failing is better than failing to try.
- Research doesn't guarantee success, but your odds improve greatly.

Warning!
Music and Research is Highly Combustible

Radio station playlists used to be a selection of songs hand picked by the program director. In some cases the disc jockeys had freedom to choose the songs they would play on their show. Before research, selecting music was a very subjective process. Record labels understood the value of getting airplay for a new song. If listeners hear a song on the radio, its chances for achieving sales success improve dramatically. Promotion departments at record labels wined and dined key programming decision-makers in hopes of convincing them to add the record company's songs to the radio station's playlist.

As *Radio* discovered the power of music research, playlist decisions became less subjective and more objective. Program directors became more conservative about playing songs if they saw indications that the audience didn't like them. With research in the hands of program directors, the influence of promotion and hype generated by the record industry grew less effective. PDs became more clinical with music decisions, disregarding their own feelings about songs while relying more heavily on research. Frustrated at first by the research wrench thrown into the finely tuned promotional machine, the record industry has now begun to incorporate music research into their own marketing and promotion strategies.

PRE-RESEARCH RADIO

Through the early 1980s, the approach of many program directors was to keep the current playlist fresh within the boundaries of the format. What that meant was once a week, the Program Director, Music Director and maybe some of the airstaff would gather for a "music meeting" to listen to new music the record labels were releasing. Each label's promotion people made the programming staff aware of the top priority songs of the week. At the station's weekly music meeting, determinations about songs to add to or drop from the station's playlist of new songs were loosely based on the feelings of those at the meeting. Songs were dropped because there may have been a collective impression that the audience didn't like them or was just tired of hearing them. As songs were removed from current rotation, those empty spaces on the playlist were filled with new

songs. New songs were added because they were deemed appropriate or potentially popular or because the record label convinced the station to give their song a chance. Typically, a current playlist was made up of thirty to forty songs and it was unusual if one stayed in current rotation any longer than eight to ten weeks. Record company artist rosters were larger and there was never a shortage of new music to push through the radio pipeline. As the record industry controlled the product flow of new songs, *Radio* executed the agenda of the labels (i.e., selling those songs), not necessarily the agenda of the radio listeners.

For record companies, getting music added to radio playlists is pivotal to the sales success of their music. Each time a station plays a song, it has an effect similar to a three minute commercial for the record. Increased *Radio* exposure usually leads to higher record sales. Before the introduction of formal music research, program directors that played lots of new music were heralded as champions by the record labels even if the station's ratings were poor. These record company darlings were praised for creating adventurous music programming on their stations.

> **Fred Deane:** I think that ten years ago when research wasn't as prominent as it is now, programmers didn't really concern themselves about being right or wrong. They were more concerned about being spontaneous. Spontaneity in *Radio* (in general) is good for *Radio*. It is what helps make *Radio* creative. It lessens the prospect of being boring.

With the infusion of research, polling listeners for their opinions about songs became part of the decision-making process in *Radio s* weekly music meetings. Instead of relying solely on the PD's own impressions, the PD was also considering listener research. This new research tool often created another obstacle for record labels to clear to get their music on the air. Research revealed that the audience was not tiring of songs as quickly as had been assumed, so many songs were staying on playlists longer, clogging the pipeline and restricting the flow of music waiting to be released. As stations observed their ratings increases attributable to music research, record companies needed to adjust the way they did business with *Radio*.

> **Ron Rodrigues:** I believe music research is a force that the Labels have to reckon with. Before music research, I believe that the influence of the record industry upon *Radio* was a lot greater. It's no longer the opinion of the MD or the PD that they're trying to influence. It's the actual opinions of listeners. I think that the Labels weren't happy having to deal with that new force. Music research was telling *Radio* to keep certain hit songs on longer than ever before. The record industry would prefer to see a current, fresh batch of music on the air at *Radio*.

MOVING TOO FAST

When programmers started looking at call-out research, they could see that they were not playing hit songs long enough. Call-out research measures three listener perceptions: familiarity, appeal and burn (fatigue). With call-out results, *Radio* quickly realized that it

had been short-changing itself by assuming an eight to ten week life cycle on current songs. Research indicated that after eight weeks of airplay, a significant percentage of the audience still didn't recognize songs and even *Radio s* heaviest users were not tired of them. Dropping songs after only eight weeks meant eliminating hit songs just as they were beginning to become popular with the audience.

> **Steve Warren:** Callout really invented re-currents. In the 1960s music programmers constantly heard from listeners. "Hey, how come you don't play my favorite song anymore?" And the station had already dropped the record after only 10 weeks on the chart. Some of the more astute programmers at the time realized that they were dropping records about the time that records were coming to their peak and really having their most value. But we only had the charts, Billboard and *Gavin* at the time, and after 12 weeks the song was off. So, *Radio* stopped playing the records. In fact, "Yesterday" by the Beatles, was only on the charts for nine weeks! *Billboard*. NINE WEEKS for the song that has been played more times than any other song in the history of the world!

In addition to revealing a longer potential life-cycle for current music, call-out also helped *Radio* understand that after a song's heavy airplay in current rotation, listeners still want to hear the songs, just not as frequently, thus the need for a re-current category for former currents. Program directors began to see that average listeners didn't listen like average radio employees and the perceptions of the audience could be vastly different from radio staff members. A program director tuned into his station might hear a song thirty times before the average listener hears it three times.

> **Ed Shane:** I stand firmly in favor of call-out music research because the more you know about your listeners, the better off you are. And the more data you have to act on, the better your gut works. It tells so much more about the songs you play. Information is so blurred by the trades. People would say, "it's #1 in *Radio and Records*." Yeah, that's good, but there were 40 #1 records in Country last year. Charts are something led by the music industry. This is not an attack, but the record and radio industries are different in the way they have to serve their publics. So if we get a station looking at its audience and checking preferences on a regular basis, they are going to program that music better. They're going to hold on to that true hit record much longer than if they were looking at the charts or feeling the internal burn because they've heard the record every 3 hours for 16 weeks and it just feels as if it should be dropped.

DIFFERENT MARKETS

The Labels maintain that if a record is selling, *Radio* should play it. However, *Radio* argues that consumers (i.e., buyers of recorded music) and music radio listeners are mutually exclusive markets. Who is right? Both are, of course. The fact that a listener is willing to plunk down hard earned money to buy music is about as strong a statement he/she can make about his interest in that music. However, a significant percentage of the radio audience spends little or no money buying recorded music. To base airplay

decisions on music sales alone would misrepresent the available radio listeners in the market.

Ed Shane: There can be a correlation between record sales and airplay. Music stations have traditionally been the marketing arms of the record industry. So, often the public can't hear a song unless they have heard it on the radio. Well, that's changing fast. Some people will buy records whether or not they've heard it on the radio. For example, Kenny Rogers sold records before *Radio* played his songs. He was going to ballparks and singing the National Anthem and his own song before the game and people were buying his music. It drove sales long before airplay. I think we have to look at them as separate and distinct. Sales are one indicator of what should drive airplay, but I think we also have to see how the people respond to the airplay of individual songs. If I am in Sound Warehouse or Sound Waves downtown, I am in an environment that is probably going to make me want to buy more records than I can afford. That doesn't mean that radio stations should play all of it.

THE RULES HAVE CHANGED

Trade publications provide a powerful marketing channel for record companies trying to capture *Radio s* attention. Airplay charts in the trade magazines are determined based on the amount of airplay or "spins" a current song is receiving on radio stations. They do not reflect the opinions of listeners in the marketplace. At times, airplay charts can seem more like a reflection of record industry priorities as labels with the most power and influence drive their songs to the top of the charts by convincing enough stations to play them. However, we are now seeing some trade publications printing call-out research charts in addition to airplay charts.

Erica Farber: The one piece of information that most people did not have on a regular basis was the ability to talk to consumers of music week in and week out and say, "What do you like and what don't you like?" *R&R s* Callout America chart was driven in our company by Tony Novia, our CHR editor. As a programmer, he felt very strongly that call out was an integral part of how he programmed radio stations. When we started to look at it, it was very exciting for us to get involved with but there was a huge education that had to go on, not only from the *Radio* standpoint but also from the record standpoint. Even though there are radio stations that do call out on a regular basis, it's not something that had ever been published. When you have 30 slots, you're always going to have someone at #1 and always going to have someone at #30. I don't think 30 is a bad thing because 30 in call out is #30 on the chart. There are a whole lot of records beneath that so we really had to do real education with the labels so that they understand what they are looking at.

Prior to the emergence of music research, the record industry wielded considerable influence over radio playlists, and as a result, the airplay charts. Getting airplay and creating a chart topping "hit record" hinged on the Label's promotional influence and

their ability to build a "story" that would generate enthusiasm among radio programmers. More and more, that story now needs to include some solid research information. The financial stakes at *Radio* are higher, competition is tougher and there is little margin for error.

> **Fred Deane:** I think research is a double-edged sword. As a trade publication, our position is the intermediary point between the radio industry and the record industry, so we pretty much know what drives both industries. The paradox will always exist. They do intersect more often than not, but when they don't intersect, they miss by a wide margin. Therein lies the research debate. *Radio*, especially as it's developed in the '90s, corporately, structurally, has placed a lot more focus on research. There is much more at stake and there's a need to drive earnings and Wall Street and the stock price and make all the right choices. The margin for error is narrow. Actually, it's more of a risk factor. So, *Radio* feels more research leads to better decisions about product. I think what research has done is very efficiently allow the PD to make more structured decisions about the music that they play and hit that comfort zone of being right as opposed to being wrong. The other side of the equation is the record industry, which is probably a little under-researched in the promotion departments where you have people that still operate on the idea of "hit record." You can't research a record until it is a hit in *Radio s* eyes, but *Radio* has to make it a hit before it can become a hot research item.

The record industry has come to grips with the fact that research is a formidable weapon in the *Radio* game, and potentially a "silver bullet" for labels too. But they are struggling to figure out the best way to aim and fire it.

> **Cyndee Maxwell:** The Record industry sees music research as a blessing and a curse. When the research is positive in their favor, they will tout it to everybody that they can because they know how important it is. But when it's not in their favor, it's very difficult for them to get anywhere. Some records need more time to develop than others. The Labels get real frustrated when they feel a lot of records get thrown away before their fair time. They understand the outlines, they understand the concept, they understand what it's about. They don't understand exactly how it's done. They don't understand why it's a statistically valid piece of information. They don't know all the nuts and bolts about it.

ARTISTS KEEP THEIR DISTANCE

For the most part, the recording artists who write and perform don't understand music research. While they certainly understand the value of radio airplay in exposing their music to potential customers, they don't give much thought to economies driving the radio and record industries. Artists want to produce music that people will like and hopefully buy. To that end, they understand some basic rules of the game. There are structures to songs involving verses, chorus and breaks that are part of the "hit" formula. Proper arrangement of the music is important. And there are some radio rules that artists respect in order to achieve airplay, such as song length and lyrical content. But without

knowledge of the radio business, artists can easily become frustrated.

Lee Bayley: Chuck Rhodes, music director at KVIL, and I were speaking at a Texas Songwriters Association meeting. He and I started going through our tap dance about research, etc. One guy stood up and said, "I don't give a good god-damn about what you do all that for. Why don't you play more Texas music? You are licensed in Texas; therefore you owe it to us." It went downhill from there. The musicians and writers don't care what you do or who your target is. They want you to play their music and won't hear of anything else but that.

For the majority of artists, creating music is personal. It comes from the heart and soul, not from behind the glass at a focus group. While I believe research needs to be in the equation when the music is turned into business, it would be dreadful to force research on the artists' creative process. The creative process should remain personal and passionate.

David Leach: I don't think too many artists go into the studio or the creative process trying to write a record that will [generate strong results in] research. I think most artists try to make the best record they can make at that time. People have their own way of assimilating the current culture. Yes, I'm sure it does affect a songwriter or artist in some shape or form. He listens to the radio, he goes to shows, he sees what's hot, his likes/dislikes probably enter into the creative process in some way. But I don't think they set out to write what's hot right now. I think they're trying to express what they're feeling inside and make the music that way.

Over the years the record industry has employed basic principles of market research to identify and capitalize on opportunities. There have been artists or groups of performers molded together to fulfill a need in the marketplace. There are plenty of singers or performers who never wrote their own songs. They rely on songwriters to pen the work. The performers bring it to life. In the 1960s, The Monkees were introduced to American pop culture. The "pre-fab four" enjoyed success on TV and sold lots of records even though the business blueprint and strategy for the Monkees had been drafted long before the members of the band had ever auditioned. Sometimes, pre-fabricated incarnations can cause embarrassment for the industry. Milli Vanilli won a Grammy for artist of the year only to have it stripped when it was exposed that the pop duo didn't even sing. They lip-synched material written and performed by someone else.

Scott Douglas: I am certain that, to a degree, some research probably took place at the management level for certain pop singing groups over time. There have been casting calls for assembling pop groups. It happens. I think that research and audience opinion definitely goes into the decision making process where those are concerned. But artists generally aren't interested in research. I don't think Picasso really gave much thought to what anybody would think about his work. I think he just went in and made paintings. Public appreciation was an afterthought. It hap-pens that way with good honest music that has integrity. I know Def Leppard does not stop to think about how they are going to write their songs before they make them. I know Ozzy Osbourne does not. Melissa Etheridge does not.

When I'm talking with an artist and the subject of music research comes up, I find myself trying to avoid talking about it too much. I want to preserve their innocence. I'm afraid I'll ruin the integrity of the artist's creative process by telling them what happens to their creation once they turn it over to the record industry and *Radio*. When parenting my children, if I dwell too much on the trials and tribulations that lie ahead for my kids, it might affect my process. Still, some artists are curious and want to understand.

> **Lou Patrick:** I was backstage at a Pretenders concert - just sitting around talking to Chrissie Hynde. I don't know how the conversation of music research came up, but I mentioned call-out to her. She was totally fascinated by the idea of call-out and made us call her in the hotel room the next day and take her through a call-out survey.

What artists don't know about research won't hurt them. As a child, I didn't want to learn the truth about Santa Claus. The Christmas fantasy was too much fun. It doesn't bother me that I have no idea how a microwave oven heats food. If I knew, it might not taste the same. I know what's in a hot dog, but I don't think about the ingredients at a ball game. I would also like to believe that my favorite songs of all time were an expression of the artist's passion and emotions, regardless of what drives me as a consumer of recorded music. That part of the process is best and most enduring when it's pure.

> **Steve Warren:** If an artist starts thinking about recording music that will test well, they are going to come up with nothing but blandness. It's a creative process, not a numbers process. There's a saying that sticks in my mind, "Not all things that can be measured are of value, and not everything of value can be measured." In the creative process, if you start measuring before you do it, it's not going to be as good.

NO TURNING BACK

As music research has become more prevalent, there has been a learning curve for all involved. To their credit, many labels have taken the initiative to learn how research can help them. Since the label's financial investment in a project is almost all up front, call-out research does not figure into launching new music, but research does help to build the "story" of success for record company promotion departments.

> **Erica Farber:** I would certainly like to believe we have helped educate the record industry on how to use call out research. We learned an interesting lesson and it's something we didn't calculate correctly. We assumed that if a record was not doing well in call out after a certain period of time that it would also be a benefit for the label to be able to pull back and maybe save some money. Because maybe they would say, this isn't going to be the hit that we thought and we'll just pull back our efforts financially. What we miscalculated was by the time a record had enough familiarity to go into call out and had made #30 on a chart, the promotion budgets were already spent. That's something we just didn't know because we didn't know enough about their business. They understand it a little bit better and now it has become a sales tool for them. Now it's not just them saying, "Hey I've got a

record." Now, we know that they are going to radio stations that might not be playing a record. They will show the station the call out and look at it demographically and how it is performing regionally across the country. They are going in using research the way it is supposed to be used.

When a new song is released it is the job of the label promotion person to get to the people at radio stations who control airplay. The goal is to accomplish three things with each station: awareness, trial and usage of their song. Before research, the strategy, or story was primarily based in hype. Now labels are using research to influence awareness, trial and usage with a story that has facts and objective information as a foundation.

Paul Heine: I think music research was originally seen by the labels as a nemesis or the enemy or something that was anti-new music. In more recent years, record company executives have come to accept it and use it. The first step is getting the PD and MD to listen to the music, like it, and get it on the air. They know they have to keep it on and get the spins up to the point where the station can test it and get a gauge on whether it is working. Once they get that, if there is a success story in the call out, record company promotion people have become adept at spreading that call out story around to the stations that either aren't playing it or not playing it in high enough rotation.

On a song by song basis, call-out has added a new element to decisions that affect record promotion and radio airplay. Now some labels are beginning to find new ways to use research for artist development. For example, some heritage artists can continue to appeal to a young audience even as they age into their 40s and 50s e.g., Aerosmith, Ozzy Osbourne, and the Rolling Stones. Others can't pull it off no matter how good their music might be. Unchangeable perceptions in the marketplace can severely limit the success of music directed at an unyielding audience. Research can provide valuable insight and answer some tough questions.

David Leach: Research has added a new element to promoting music to *Radio*. In the old days it would be sales and requests and a programmer's gut. Now, research is probably the most important factor in determining how much a record gets played, frequency, intensity and the length of life it has on the radio station. It has become the primary tool for programmers to help them program their stations. We have to work with the research that *Radio* is telling us. If I am getting good research or bad research, that information has to be digested and then assimilated into the process. It can help or hurt you, but it is there and has to be dealt with. It is a part of both our lives and an added element that wasn't there 10-12 years ago. As a Label, we have used research on a limited basis to help identify an artist who might be transitioning between their old audience and a newer audience. For an artist that hasn't had an album out in a few years, we have used research to help identify the highest appeal demos. It tends to tell you more where the appreciation for that artist is right now than anything else. It doesn't tell you if the artist has a hit or not, it is more about who is looking for that artist at a particular point. It is more strategy related.

The record labels are very interested in what's going to work and what isn't. Research revealing that the audience isn't embracing their music can be infuriating but the labels are finding that it's better to find out the truth sooner rather than later.

> **Erica Farber:** Let's face it, not every record is going to be a hit, and identifying products that are going to sell is, at the end of the day, what the record companies want. Now, if a record company has a particular song out and the call out is not as favorable as they would like, that can be very frustrating for a record company who has put their resources behind the record. However, I think you will find within the labels both horizontally and vertically they are doing more research today than ever. They are sometimes researching songs before we hear them, they're doing a lot of research that I don't think we are privy to. They're trying to figure out a way to also save money and if they can go out and learn something that they didn't know before that helps them spend their money more efficiently, that's a good thing. How you interpret that research and what you do with it is more important than the actual research itself. I think there are certain individuals who are charged with the responsibility to find the next big act and without question, A&R is critical within a record company. But we've seen a lot of the labels cut down their roster. They are not releasing as many albums and they are trying to get more songs out of an album. Labels are still going out to garages to find baby bands, but I don't really know that A&R is using research to do that. There is a fine line between art and commerce. It's a big issue.

The radio and recording industries are both experiencing the growing pains associated with conglomeration. Both have seen tremendous consolidation in the last few years. There is a new world order complete with new financial pressures that are part of the package that comes with stockholders and Wall Street. *Radio* and records have become big business. Money is a very influential language. When the stakes were smaller, tolerance for error was greater. Now, even a small mistake can be devastating. With so much money on the table, research is being used more in both industries. The players with better, more accurate information are enjoying a clear advantage.

Quick Fix Silver Bullets

- Wining and dining *Radio's* playlist gatekeepers is no longer enough for labels to get airplay for their music. Radio wants to take fewer chances with music.

- The on air life cycle of a popular new song can be much longer than had been previously thought.

- Music is the thread between the radio and record industries but their agendas have little in common.

- Airplay charts reveal radio exposure. Call-out charts reveal listener response.

- For the most part, the creation of music is still driven by the artist, not the market.

- Labels are getting a better grasp of research as a marketing and promotion tool.

4

Dawn of Research

It's difficult to pinpoint the exact time research was first applied to music for radio stations. There was informal audience observation in the 1950s, with refinement of the original concepts leading to the first formal opinion studies in the 1960s. At that time, television was becoming increasingly popular in America and *Radio* recognized a potential threat from the new medium. Those in *Radio* thought that polishing the programming would deter listeners from tuning to TV.

Music radio formats had been broad with few restrictions in terms of music styles or genres. Tracking record sales at local music stores was a common practice for stations to determine what songs were "hot" in the market. Early formal listener research consisted of small samples of listeners recruited over the air to a focus group type of setting. As methodologies developed, stations using music research experienced significant increases in audience size and time-spent-listening (TSL). Radio professionals began to realize how different their own instincts and perceptions were from their listeners.

Previously, radio stations had driven the market, which put *Radio* out of sync with the audience. Research introduced a market-driven approach, giving the listeners some say in the on-air product. By reaching beyond the active listener who may buy records and call request lines, *Radio* discovered a gold mine in the opinions of the passive listeners. Tapping into the passive audience who could influence ratings opened the floodgates to a new way of programming and a new measure of success.

Audience testing generally, however, is not a recent development. Opinions have been collected, measured and used to modify modern entertainment since the early 1900s. The movie industry recognized quickly that audience research could be used to predict market reaction. Sometimes a film was modified based on the outcome of the test. Groucho Marx was a pioneer in not only comedy and film, but also auditorium research.

> **Ed Shane:** The Marx Brothers used to do what amounts to music testing. Before they would do a film, they would go into a Vaudeville theater and do a couple skits to see if people laughed where they thought they would. Then they would do the skit on film. It was truly an auditorium test. There were other things called confrontation analysis in the early 1900s. Products were taken to auditoriums for consumers to sample. Then researchers would attempt to take the products away to see if they resisted.

THE FIRST MUSIC TEST

As mentioned, early music research traces back to the 1950s. Research was little more than random informal observation at first, then gradually became scientific. By 20th century standards, *Radio* was very small business at the time with even the largest companies owning no more than 12 stations. Many stations were individually owned and operated as "Mom and Pop shops." Prior to the widespread use of Arbitron's audience research system, audience size was not measured and not used as a criterion for selling advertising. With less competition and no score-keeping system, there simply wasn't a need for research. Still, some modern programming and research pioneers couldn't help but notice how differently "average" listeners reacted to music. For example, they could see that most listeners didn't grow tired of hearing the same hit songs frequently.

> **Jim West:** I think the first successful research occurred at a bar in Omaha, Nebraska in the 1950s. It started by giving the waitress a handful of change for the jukebox. When it got quiet, she would ask the customers what they wanted to hear. It was interesting because the customers wanted to hear the same songs over and over and over again.

Radio became more competitive in the late 1960s and early 1970s. The concept of audience measurement ratings was gaining popularity. Until that time it was not unusual for the one local Top 40 outlet to play a wide variety of Pop, Standards and Country music on the same station. In some ways, *Radio* was like the "Variety" TV shows of the time.

> **Steve Warren:** While I was working for Ted Turner, I can remember playing Sly Stone on the same radio station as "For the Good Times," by Ray Price. Talk about some weird segues. But that's the way Top 40 was. It was a variety format that was very much like the Ed Sullivan Show - a chimp over here and the next thing you've got is an opera singer. But, with more and more radio outlets, certainly that led to boutique programming, which led to where we are today - Hot AC, Soft AC, New AC.

Music formats started to splinter and FM started taking audience away from AM. With superior audio quality, FM became a perfect residence for music formats. Early versions of the Rock format on FM were "free-form" and adventurous with disc jockeys making decisions on what to play on their show. Some of the most popular syndicated radio shows featured assortments of music styles.

> **Gary Krantz:** In the early days, especially on the FM side, we were given the reins to program the radio station mostly on gut instinct or "mother-in-law research." Mother-in-law research is asking those closest to you what they feel the radio station should be doing in terms of music, presentation, air personalities, etc. A show like the *King Biscuit Flower Hour* from the late 1970s and early 1980s might have featured the Allman Brothers, Mahavishnu Orchestra, Styx, Sparks, and Bruce Springsteen in 5 consecutive shows. It reflected where the Rock format was, which was much more adventurous than it is today.

REACHING OUT TO LISTENERS

As competition increased, *Radio* recognized a need to gather information about audience perceptions. Simply answering the request line wasn't enough. To read the passive audience, research had to become more active. Randomly selecting listeners to answer questions became a priority for product conscious radio people, even though there was little or no budget for it.

> **Erica Farber:** When I was on the station level back in the 1970s, music research wasn't as sophisticated. In Boston at WROR/FM and in New York at 99X, I had picked up an idea from Paul Drew. We were on a shoestring budget, and the GM, PD, marketing director and I took clipboards and stood in parking lots. As people were getting into their cars we would ask them a couple of questions: 1) First of all, when you turn your car on, will your radio be on? Yes or No. 2) When you turn it on, what station is it going to be on? It was amusing how many people said their radio wouldn't be on, but when the car came on, the radio automatically came on.

RECORD SALES

Before research became the necessary budget item it is today, *Radio* scrounged for whatever data it could gather. One piece of the puzzle was record sales. Tracking sales measured interest by showing which music was hot enough for fans to plunk down hard-earned cash. This active group of music purchasers wasn't representative of the station's entire audience, but it did provide some objectivity via numbers about music.

> **Jim Smith:** I was promised callout when WLS hired me as music director in 1973, but that promise was put on the back burner for several years. Instead I optimized the music research already in use — contacting record stores. The station had previously been calling only five stores each week. And, this was Chicago!!! With the approval of the PD — first Tommy Edwards, later John Gehron – we increased that weekly sample size to cover more than 200 sales locations. I anonymously visited many of the metro locations, one or more times, to get a sense of the level of sales volume that each was doing and also a subjective measure of the clientele. I also wrote the computer programs to tabulate the data and to analyze the results, which seems so logical today but was a bit radical back then. Of course, with WLS's incredible lineup of air talent and world-class marketing, we may have played geese farts instead of music and still have been the most listened to station in the United States.

LISTENER ADVISORY BOARDS

With an interest in listener opinion about new music in the 1970s, *Radio* first took a focus group approach. Around 1981, Lee Abrams and Dwight Douglas introduced the concept of a Listener Advisory Board (LAB) to me at WZZO. Gene Romano was doing mornings and he became our LAB director. We recruited a dozen listeners over the air to

meet one night a week at Gene's apartment to listen to new music. We didn't pay them, so we fed them pizza, beer, wine and gave them albums or station merchandise for sharing their opinions with us. This was the first attempt at music research for Gene and me. Looking back, we laugh about the questionable nature of any "findings" from the Listener Advisory Boards.

> **Lee Bayley:** In the late 1960s, we were doing music testing. We really didn't know what we were doing, but on many different opportunities we'd sit down with a number of people and go through a bunch of new music and get their opinions. We were just kind of stumbling into it. It was a Listener Advisory Board, not staff people. We didn't know all the technical questions. We just knew the yes's or the no's. It developed from there. The mistake we made at that time was coming out of these focus groups with what we thought were actionable answers. We only learned later that these concerns needed to be studied further. But we were jumping on them. While we didn't really know what we were doing with research in the 1960s, we were aware that we needed as much information from the listeners as possible.

LABs were typically made up of a panel of volunteer listeners. Through direct interaction, we could see that the listeners were very honest in the beginning, and also very naïve about the business aspects of *Radio*. However as the same LAB members returned week after week, we watched them become more *Radio* savvy. Each week they grew more professional as respondents and less typical as listeners. LAB members began to think about music as though they were a panel of PDs instead of average listeners. (Later, radio stations turned to local "field services" to recruit listeners for research, but ultimately with the proliferation of testing drawing on a finite number of respondents, the same dynamic eventually repeated itself). Overused respondents or "professional test-takers" do not respond the same way as an uninformed audience.

EARLY CALL-OUT

Call-out research gave radio stations a direct link to their passive listeners. The objective is to randomly dial listeners in the market, play short song clips or "hooks," and determine their level of familiarity, appeal and fatigue (burn) for each song. With call-out, stations could reach listeners who might never call the request line, play a contest or go to a promotion. These listeners were also "survey friendly" meaning they might also be a likely candidate to participate in Arbitron's research. As broadcasters reached out to their audiences with call-out music research, the answers became clear, and the impact was, at times, staggering.

> **Dave Gariano:** In 1980, John Sebastian said, "If you're going to hire me to program WCOZ/WHDH, Boston, we have to have a research department." We literally took over the jock lounge to create a research room. We had the jock lockers taken out and put in 12 individual cubicles with phones. I don't think any of us knew what we were doing, except that we wanted information. The station had been nothing. It was the same old thing, gut, instinct, charts, request lines and all this other stuff and we just said, "no, this is not what we're going to do." Especially

for the rock station, WCOZ, it completely created a new format because there was no preconceived notions going in. We didn't care. We tested songs that we thought were relevant, then we would throw in the wild card ones. Boston was just a musically rich market, had a great rock history. But in those days, our Rock competitor WBCN was playing "Funky Town" by Lips, Inc and we knew fundamentally that we could put together a pure rock station. It was "China Grove" and the hits that rose to the surface but it was what the people wanted. Both the AM and FM became incredibly focused radio stations. And all of a sudden, these things became #1 and #2 in Boston with shares that will never be seen in any top ten market again. The AM had a 13 share 12+ and the FM went from a 4 share to an 11share. We owned a 24 share of a top 10 market! It was unheard of, especially in an album rock world. Testing the library and making sure each song worked was really revolutionary.

PERCEPTION VS. REALITY

Research began to uncover that *Radio s* perception of audience opinion was sometimes dramatically different from reality. In its attempts to draw lines in the sand between music styles, sometimes *Radio* outsmarted the listeners. Stations tried to come up with a better selection of songs and put just the right label on the package. It didn't always make sense to the listeners.

Lee Bayley: Rob Balon did a Country music study which was really important to the industry at the time because we were throwing around a lot of format labels: Modern Country, Hot Country, New Country, Fresh Country, whatever. We were all, as programmers, putting them in different piles. We kind of screwed ourselves because no matter what we called it, it came down to one thing. The listeners just called all of it "Country" and the listener wasn't getting the distinctions.

Radio programmers with high music passion levels struggle most with audience research. Invariably, those in the business are way out in front of the audience in terms of familiarity, appeal and burn cycles.

Bob Chrysler: Music research's greatest value for a programmer is that it slows you down. You learn that the audience is nowhere near being in tune with the music as we tend to think they are. Programmers move music in and out way too quickly. When I first got call-out research back in the early '80s, I didn't believe the data. I was in shock. I could not believe what I was seeing on paper. My air staff was really sick of and threatening to quit over a song by Prince - *When Dove s Cry*!! They were that tired of it, but yet the research was showing that the audience couldn't get enough of it and were peaking on it when we were all ready to kill ourselves over it. That was really a wet towel in my face - learning the value of research. To warm up to that reality, I denied it at first and ignored it. I would implement part of it and ignore the rest because I knew better. When I finally broke down and really started rotating the music and implementing what the call out was telling me, we saw a 3 share increase from a 6 to a 9 share in the span of 2 books. That to me was proof-positive that research works.

What used to be considered small, non-competitive markets with little need for research now find themselves in very competitive environments thanks to the addition of many new radio signals. To thrive, it is essential to stay connected to the target audience regardless of market size.

> **Bill Palmeri:** Fifteen or twenty years ago, we trusted the PDs for their gut opinions on music. The competition included one, maybe two stations per format in the market. We now have six different Rock stations in our market doing some variation of what one station used to do. So now that the lines are drawn and we have these micro formats, we can't just go on gut and history. We can't get away with doing the kitchen sink approach to radio anymore. Nor can we restrict music testing to once every couple of years.

AUDIENCE EMPHASIS

Audience ratings measurement introduced a scorekeeping system to *Radio* that clearly separated winners from losers. Without such measurement, the competition was non-aggressive. After all, how competitive is any game without keeping score? With no scoring to hold PDs accountable, more emphasis was placed on being "creative" on the air than being responsive to the audience. Many programmers simply followed the herd and played chart-topping songs only because everyone else was playing them. As *Radio* studied ratings results, they saw that creating loyalty to a station by becoming a favorite with the listeners was the path to scoring big points and winning the game.

> **Tom Evans:** There was a time when a lot of programmers went by national charts or national spins and they really didn't focus on what was pertinent to not only their market, but their station's partisans. If it is true that 80% of listening comes from 20% of your listeners, then you have to identify your core and satisfy that core to do the best job you can to maximize ratings.

Thanks to the ratings and revenue success that it has helped to achieve, music research has moved from a luxury item to a necessary budget item.

> **Don Hallet:** If you look at the average music radio station, 85% of the product is music. It's not a luxury anymore. It is a necessity. In 99% of the cases where I have implemented a music test, whether it's the radio station's first test or the first music test in quite some time, we'll have an increase in ratings. The appeal of the music to the audience is key. If you are living and breathing in the ratings world in any way, even if it comes down to county by county, once a year, in condensed markets, you've got to be using research.

The transition from "driving the market" to a position of being "market driven" was tough on many radio egos. For years people built careers on their ability to pick hits, yet, in reality, the audience picks the hits. They always have and always will. Research lets *Radio* unveil the process. Long revered as purely art, research had people handling music as a product.

Al Boettner: It became clear as stations became more competitive, that trusting a DJ or MD or PD to select the music for his audience was dangerous, especially as the audience began to fracture with the advent of FM. People really desired specific types of music and expressed preference for certain kinds of music. We also couldn't assume that while we might get tired of a song very quickly, our audience may not, or vice versa. We recognized that it would be foolish to trust any one person to decide what the target listening audience really wanted. It just made sense to make sure that what we were presenting as a product was palatable to the target. The big change was to recognize that music was actually a product. We actually started looking at it as you would any commercial item.

MEASURING PASSIVE LISTENERS

Over the years, the technical aspects of music research have changed but the purpose remains the same. Research is intended to solicit the opinions of the passive listeners. The passive listeners may never think to call the station to praise or complain. With so many listening options now, listeners subjected to music they don't like simply change stations. No apologies, no regrets and they rarely tell the station. But they do tell Arbitron. Good research should be able to reach that passive audience and incorporate their opinion before they punch away. Before recruiting passive listeners for their opinions, *Radio* relied on the vibe emanating from the active audience. It turned out that the most active listeners – ourselves - were clearly different from the passive listeners. We discovered that the passive listener was the silent-majority. They are the listeners who never buy a record or call the request lines. They make up the largest portion of the diarykeeping audience who determines ratings. Research is designed to uncover and utilize the opinions of people who won't come forward uninvited.

Quick Fix Silver Bullets

· Early movie industry research was a model for modern music research methods.

· The threat of losing radio audience to TV provided incentive to learn and react to listener desires.

· Competition encouraged *Radio* to develop more clearly defined music formats.

· Audience measurement in the form of ratings created a scoring system that clearly exposed winners and losers.

· Listener Advisory Board panelists quickly became "professional" respondents in weekly focus group environments, thus limiting their usefulness as research.

· Record sales tracking is a form of research but recorded music alone does not replicate *Radio*'s form of entertainment, nor are music purchasers necessarily representative of radio audiences.

Quick Fix Silver Bullets (continued)

- Call-out research was designed to target passive listeners who can influence ratings.
- Research continually reminds those in the industry how differently the listeners hear radio stations.
- More radio signals and increased competition for advertising dollars have created a need for research in smaller markets.
- With research, music on the radio evolved from art form to consumer product.

Evolution of Music Testing

From the time *Radio* discovered the power of research, it has faced the challenge of properly executing its systems and applying its results. *Radio* used to be 90% instinct and 10% information. Before research, programmers used their instincts and saw themselves as artists covering a blank canvas, often with little consideration for the market's perspective. The viewpoint of the artistic PD was that he or she would decide what the finished work would look and sound like. If listeners didn't approve, "Too bad." The audience had little influence except for those few active listeners who called request lines or wrote letters to the station. After the dawn of research, the pendulum started to move in the other direction. As the ratings results of stations using research became known, data became very popular, but a lot of mistakes were made. *Radio* struggled with its new weapon like a young Cub Scout with his first pocketknife. A shiny blade in the hands of a 10-year-old can be fascinating and frightening at the same time. For *Radio* at first, there was an over-reliance on research. Stations gleefully slashed through their playlists until the only surviving songs were familiar, appealing and not tired. However, the clinical sterilization of playlists often led to a negative outcome: boring radio. The need for balance grew apparent as burning questions fueled the debate. Should the music determine your audience? Should the audience determine your music? We now know the answer to both questions is "YES!" but the answers didn't come easily. The most successful radio stations find the precise recipe that combines the two critical ingredients: 1) driving the market; and 2) being market driven. New research systems are emerging to replace old, outdated methods and new attitudes about the application of findings are helping Program Directors achieve better balance.

DRIVING THE MARKET – THE INSTINCT PROBLEM

Before the advent of *Radio* research, there was only pure instinct or gut driving programming decisions. The air personalities and program directors decided what to play, and format boundaries were loosely defined. For the most part, if you could find the record in the radio station, you could play it. Sometimes if you couldn't find it, you could bring it from home and play it. This made for some very fresh and adventurous sounding radio stations. Unfortunately, the market didn't always share the enthusiasm of some of the musicologists on air. From the listeners' perspective, the music choices on the air were "wrong" more often than "right" and such stations driving the market were driving listeners to competitors.

MARKET DRIVEN – THE INFORMATION PROBLEM

The birth of music research meant that stations could accurately measure listener preferences and use that information to satisfy more listeners. The result? Music selections were "right" more often than "wrong" and these stations acting on music research gained a significant competitive advantage. The road to success seemed simple – trim the playlist to feature only the songs listeners like most. This game plan worked for the first stations on the research bandwagon in each market. But as more stations utilized market research, the playing field leveled and no one station had an advantage anymore. So tight playlists got tightened some more and air personalities were told to shut up. Within a period of just a couple of years, stations that had featured playlists of 3,000 songs had trimmed their libraries to the 250 best testing titles and stopped taking chances on the air, or so they thought. Over time, squeezing the playlist made stations sound repetitive, predictable, stale and vulnerable. The listeners responded by leaving what had been their favorite stations in search of something "different."

GROWING WISER

Having erred in both directions, we can now see the need for balance. The best Program Directors have evolved into managers who are part artist and part scientist. Their passion drives creativity while objectivity keeps their personal emotions in check.

> **Jeff Carrol:** Music testing is a tool to help make music decisions that make sense. I also use research to disprove my own gut. That happens. I like to achieve a balance as to what science is telling me and what my emotions are telling me. *Radio* is and always should be a science/art combination. If you rely on one or the other solely, I think you'll miss the mark.

As time passes, we explore, we pioneer, we make mistakes, we learn, and we grow wiser. For many, the process represents a 180 degree change in attitude. Experienced programming consultants help keep a station focused on the target's bulls-eye.

> **Lee Bayley:** My attitude is one of the things that has changed most over the years. I really don't care what I think or what the PD thinks. I only care what the listener thinks because his is the only perspective that counts. The way we view music research has changed. There is certainly more respect from all levels. The one thing I do see on all levels is that we all understand the need for actionable information regarding music. I can assure you in Dallas, TX, you don't want to play a lot of Billy Ray Cyrus. But in Louisville, KY you will play the hell out of Billy Ray Cyrus. The only way you'll know that is by researching the market.

Radio people entering the business since the early 1990s have been immediately exposed to research tools but they can't fully appreciate what radio was like before research. Like computers and digital audio, research has always been part of their profession. Older industry veterans have experienced myriad developments in the research process. If they hadn't actually lived without research, it might now be difficult to imagine not having it.

Dan Vallie: Before he started using research, my friend Scott Shannon was on a panel at a convention. The subject of research came up. Scott said he didn't do "in-house" research, but he did do "outhouse" research. In retrospect, we did some scary things. Screening was not supervised properly. Training of interviewers was poor to none. "In house" research meant part-timers and interns. I remember getting all the callout music data handed to me hand written, and hand tabulated. I can still see those Xerox pages of legal pads with some numbers scratched through and others written in, handed to me by a 19 year old "research director" who six months earlier had been a station groupie. Today there are standards and most have their research done by notable qualified researchers.

EYE ON IMPROVEMENT

In the past few years, research companies have introduced different approaches to music testing. Each is an attempt to provide better information faster and more efficiently.

Bob Dunphy: Everyone is trying to eliminate the biases. There are so many different options now to do research. With each new generation, it seems there is a new opportunity to do research differently. It started with call-out on the phone and doing some one on one's. Then Bill Moyes' auditorium music testing in the early '80s and now onto the *Living Room Music Test*.

Through sophisticated sampling and measurement techniques, music research studies now survey markets with greater precision. Better sampling gives stations the opportunity to work with smaller but more reliable samples, in some cases saving thousands of dollars on a single music test.

Dan Hayden: Music research studies have changed. Research sample sizes have become smaller. Part of that is because targeting of the test sample is more precise and better than ever before. Ten years ago, samples were bigger, broader and cost more. Now, the samples are superior and costs have actually come down.

TOTAL MARKET REPRESENTATION

Auditorium style music testing is limited in its ability to attract the participation of listeners from a large area. Typically, auditorium samples can only be drawn from a geographic area no more than a 15-minute drive from the test location. In small markets, this limitation may not be an issue but in markets covering four or more counties, there can be measurable differences of opinion among targeted listeners. Take a look at Arbitron's "hot zip code" report on a market and you can see clear patterns of music and station preference. Listeners are not equally distributed among all zip codes in a metro. Arbitron's findings reveal that people of similar music and radio interests tend to live in the same neighborhoods. Diary returns show that in some zip codes, Country is more popular while Rock stands out in others. Furthermore, within those format preference areas, there can be variations in preference for music styles within a format. For example

one "Rock zip code cluster" may prefer "heavy metal" while another shows greater interest in "mainstream rock." If a radio station's music test sample is drawn from only one area, the results of the test can skew dramatically from the same test conducted in another part of town. As WMMR Program Director Sam Milkman observed while handling research at WXRK in New York, there were significant differences in the results of two identical auditorium music tests conducted within the metro. The opinions of Rock listeners in the more affluent Long Island test varied greatly from Rock listeners drawn from the North Jersey area. With such different results from the two areas, WXRK combined test scores in an attempt to find "common threads." This tactic still leaves · many areas of the metro underrepresented and may also be economically unfeasible for stations whose budget only allows for one test at a time. Some of the more recent developments in music testing help stations achieve "total market representation" in sample recruiting, thus overcoming geographic limitations.

> **Mike Harris:** We've seen improvement in terms of the difference between auditorium testing and people being able to sit in their own homes for a music test. We've done auditorium testing, we've done phone based interactive testing, and we've done Living Room Music Testing. We've had success with all of them, but auditorium testing to a lesser degree.

Making research participation more accessible to typical listeners helped eliminate problems and limitations associated with old sampling techniques. Better market sampling allows stations to gather the opinions of a group of listeners that is more representative of their actual audience.

> **Dave Gariano:** What I've been excited about in the last few years is seeing the evolution of music testing where it has become a more customized approach for the convenience of the person whose opinions are being solicited. We needed to research a region, not just a market, that took 2 hours of driving to cover. The question was, if we were going to do an auditorium test, where would we locate it? Secondly, during 6-8 months of the year, it would be inaccessible for most people because they would be dealing with blinding snowstorms. Finally, with the *Living Room Music Test*, music testing has become a form that is digestible for real people to use and embrace. It's on their schedule, not leaving their house or fearing for their safety, and eliminates the recruitment of professional test takers.

CREATING A HOOK TAPE

Technological advancements have affected music research in many ways. Mike Henry remembers the overwhelming chore of hook tape creation. "Every radio station used to make its own hook tape. Once a year, they'd have to close their production room for two weeks." Now, thanks to digital audio systems, hooks are mastered and stored on computers. A 600 song hook tape can now be prepared from start to finish in just hours.

> **Al Boettner:** Early on, I remember the longest test ever was 300 songs. The hooks were 10-13 seconds each because we were afraid the respondent wouldn't be able to

recognize the song and vote on it. With time, it became apparent that they could tolerate a lot more. At the end of a 300 song test, respondents would say, "That's it? We're having fun!" We also learned that we could shorten the hooks. Some research companies are doing 4 to 6 seconds. Most don't use pausing between hooks anymore either unless they are asking additional questions. As a result, it is a much more rapid fire.

As hooks grew shorter, there seemed to be no noticeable change in results. Listeners showed little difficulty recognizing and scoring shorter song snippets. By cutting hook length, stations were able to test 50% to 75% more songs. Shorter hooks kept the flow of the test moving and kept respondents more attentive. Hook tapes now move at about the same rate as the scan function on a car radio. In a music test, like in the car, listeners can make a conscious judgement after only a few seconds of exposure to songs.

COMPUTER ADVANTAGE

A large part of any music research project involves data processing. Whether the study is conducted over the phone, in an auditorium, or in the listener's living room, their answers must be coded, processed and compiled so the findings can be interpreted. Before computers, the data processing function was done manually. With only a calculator and reams of paper, data processing was an enormous, time consuming chore that often took weeks to complete. Computers not only made the process faster, they provided more flexibility in the way data could be analyzed.

Bob Harper: The first test I did, we coded all the songs manually. We had grid sheets that we would Xerox onto blank sheets and manually put research information in. Now we can turn around a test and have it back in the station's lap in 48 hours thanks to computers. We have a step in what we do that once the station sorts their music, they can then put it into their Selector [music scheduling software] so it saves a whole step.

Interactive Voice Response (IVR) technology has been used by some music researchers for telephone call-out and library music studies. With IVR, listeners hear song hooks over the telephone and score them using the telephone keypad. Combined with data management capabilities of computers, IVR eliminates the need for a live operator during a survey and the listeners handle the data entry chore.

Jeff Carrol: We brought call out research into the building more economically and we get results back faster. We can create a database of not only song histories, but of people who participate in research events.

The telephone may be the last technological tool connecting old and modern research techniques. Used for recruiting by Arbitron, radio stations rely on the telephone as well to reach out to their audience for recruitment or actual surveys. Telephone remains the primary initial contact method because it can be used to reach over 95% of the listeners. Some companies have begun to experiment with on-line research via the Internet.

However with a relatively small percentage of the population accessible via the Net, online testing is limited in its sampling ability. Nonetheless, as the Internet grows, it is likely to play a material role in music research.

Don Hallet: The most notable changes are the new technologies. Telephone methodologies, interactive systems, *Living Room Music Test* and one to one music testing where you are put in front of a computer or a digital keypad. The new Internet [music research] sites scare me to a certain degree, but time will tell. The Net is fascinating new technology.

MOVING TARGET

When music research was new, listeners were easier to recruit for testing. For little or no compensation, listeners would go out of their way to share opinions with radio stations. Research was unique, interesting and fun for the audience. Of course, this was before the massive intrusions of telemarketing campaigns and phone scams. Today listeners can block incoming phone calls from unfamiliar numbers. The target audience is becoming more elusive which makes the research process more difficult. As busy lifestyles become more demanding, listeners have become less responsive to research efforts. Longer hours for working parents with jammed school, sports and activity calendars are devouring society's valuable free time. Forfeiting a night at home for the sake of research and a $50 premium hardly seems appealing to a listener whose household income is over $100,000.

Mike Henry: What has changed since I started in the mid '80s, is the acceptance of research. There has been a lot more difficulty getting people on the phone. Anything you are doing on the phone, including perceptual research right now, is suffering from a declining telephone response rate. When phones showed up in everybody's kitchen, telephone research was a wonderful idea. It flourished for many decades. Phones will probably always remain a part of the research methodology. But as long as new technologies are available to reach people, those need to be accessed and used in conjunction with other delivery systems so you get the opinions of the entire population, not just ones who happen to be fond of one technology over the other.

KNOWING THE ROPES

Radio stations have become more educated and demanding as research customers. General Managers and Program Directors understand the need for more stringent recruiting criteria, random sampling, and total market penetration. What's at stake is the financial future of the radio station and the individuals who work there. Instead of being sold a research package, stations are making certain that the research they buy will get them to their goals.

Bill Palmeri: Years ago, research companies would put anyone in a room between the ages of 18 and 40 and it didn't matter if they were male or female. Now, we're being a lot more careful about the criteria we're setting for recruitment. Now

research companies really do ask questions to find out what's important and not important to the client - even how the reports are done and what information is important to display. Before, we just accepted what was given in the flat rate fee, "Here's the price for a music test and here's how it's done, no questions asked. If you want it, take it." Competition hasn't just changed *Radio*, it's changed the research business too.

The educated research customer understands the economies behind their music test. *Radio* is recognizing the need to look past fancy electronic graphs and colorful presentations of research results. How the sample was recruited and what the data really means is more important. Informed radio experts see frivolous wastes on unnecessary window dressing and they can detect sub-standard work from "bargain basement" research outfits.

> **Dave Richards:** As time goes on, you learn a lot more. There seems to be more and more companies who have the end all, be all answer, cume vs. core, going broad rather than going narrow. Methodology has changed over the years. Methodology is as important as the person presenting the information but some companies have an agenda. That is not what you hire a research company for. You hire your research company to get your broad data and make suggestions and recommendations. Also, price is such an issue to look out for. If a company really pitches that their price is less expensive, does that means they are looking at fewer bodies or cutting corners some place? That is not the way to do research. That is like looking for a surgeon who is going to give you the best deal. You want it done right and if you have to pay an extra 10%, it is worth it!"

Using any of the generally accepted research methods can help a station if properly conducted. Some methodologies may fit a station's needs better in situations involving issues such as cost, demographic resistance or geography. It's imperative to look past the bells and whistles of marketing research to discover its real substance.

> **Carl Gardner:** I tend to have a pretty healthy level of skepticism about the latest gimmicks in research. Research is a tool, one of many. I haven't seen much of anything that has come along in my time in the business that impresses me as a paradigm shift in the world of music research. You may be sitting in your living room instead of an auditorium or may be taking the thing over the phone vs. personally at the focus facility. There have been those kinds of changes, but essentially it's the same thing and always has been - trying to select a sample that looks something like your target audience and play them a bunch of songs and have them vote on them.

CONTINUING EDUCATION

As listener lifestyles change, so must our methods of researching them. In just a few decades we have witnessed extraordinary change in music and the media delivering it. If *Radio* hopes to prosper into the 21st Century, it must find new ways to communicate with

the audience and react to their desires.

Steve Raymond: As electronic media bombards the population and musical formats continue to splinter into smaller niches, research firms have come up with new ways to reach people. First phone surveys, then auditorium, and now in-home Living Room Music Testing that makes it even more intimate. My philosophy has always been that change is good. If more radio stations of the same format come into your market, it makes you keep your eye on the ball. It doesn't allow you to get lazy. Change makes you work harder. The same is true with increased competition among research firms. You know each firm is really taking their craft seriously to provide the best information. And that's a comfort for program directors and general managers who want accurate information quickly and efficiently.

There is no room for "friendly competition" in *Radio*. It's an oxymoron. There is too much money on the line and there are too many lives depending on winning. A casual approach to the business today puts a radio station in serious jeopardy.

Bob Harper: You need to know who your target audience is. You need to zero in on them and you have to assume that the guy across the street is doing the same thing. If you were in the supermarket business, you'd be getting clobbered by the guy across the street if he knew a whole lot more about the customers than you do. He'd be able to anticipate his customers. He'd arrange the store more carefully according to the needs of his customers. He'd put features in his store that were much more customer friendly... a deli over here, a fresh bakery over there, a complete wine section. The more he knows about the customer, the more likely he is able to really put that store together in a way that serves the customer and keeps them coming back. It's the same thing that we have to do. The store that sits back down the street and says, "well I don't need to do that" and follows the lead of the other guy is putting in the deli counter 3 years late, installing the bakery section when the trend for fresh baked goods is already past. Maybe you're negotiating with the fresh coffee guy when Espresso is passé. To not stay on top of things when the other guy is, seems very foolish.

The most successful radio operators keep their fingers on the pulse of the audience. Through solid research techniques, they know exactly when and how to make format adjustments. They keep listeners loyal to their station because they understand the value of owning the franchise. Stations who still don't get it may very well find themselves changing formats again next year.

Quick Fix Silver Bullets

- Stations driving the market using 90% instinct drove music listeners away who wanted familiar, favorite songs.
- Market driven stations using 90% information became stale, predictable and boring.
- Maintaining a balance between emotional and scientific involvement is tricky, yet necessary.
- Narrower target audiences with more precise age and listening criteria have allowed for smaller research samples.
- Newer research techniques with samples from the entire listening area give total market representation for a music test.
- Shorter song hooks create lower respondent fatigue and increase the number of potential songs to research without sacrificing accuracy.
- The introduction of computers has dramatically reduced data processing and turnaround time.
- Massive tele-marketing and phone scams have made listeners wary of the telephone, making research efforts more difficult.
- Sexy electronic presentation of research results is worthless if the sample is flawed.
- "Friendly competition" is an oxymoron. Build and maintain your franchise or get ready to change formats.

Methodologies

Several research methodologies have been developed to measure audience opinion about music. Central location methods such as the Auditorium Music Test (AMT) or the Personalized Music Test (PMT) lure test-takers to a site where music is sampled and scored either manually, mechanically or digitally. Other methods have listeners participate in mail-out surveys at home via the *Living Room Music Test* (LMRT) or entirely over the telephone using Interactive Voice Response (IVR) technology for short and long-form call-out. Some companies are beginning to experiment with web-based music testing on the Internet. Each method has its own twist, gadget or wrinkle that makes the music test faster, cheaper, easier, more projectable or reliable, and all will be discussed in this chapter.

But for all research companies, the music research effort is becoming more difficult. Over 95% of American households have a telephone and big businesses have noticed. Intensified telephone market research and tele-marketing efforts by many commercial companies have delivered an unwelcome intrusion on consumers' dinner and prime time TV viewing hours. Finding willing participants has been a growing challenge for researchers. Consumers in search of privacy have armed themselves with defense mechanisms such as answering machines, "Caller ID", and "Call Blocking." Since all the popular music research methods begin with a phone call, simply finding a live human on the other end is a big hurdle to clear. Assuming that a person answers the phone and makes it through the radio station's screening criteria, the next challenge is to convince the listener to participate in the research process. The pool of willing respondents that once seemed bottomless is getting shallow.

TEST-TAKER SUPPLY AND DEMAND.

When demand exceeds supply, new supplies must be found. As *Radio s* dependence on research has increased, so has the demand to find a larger supply of listeners willing to participate in the test. Research companies are charged with the task of mining a qualified supply of respondents in the market. In the early days of AMT research, it was easy. Lots of supply and not much demand. Finding 100 people in any market willing to give up a Tuesday night for the sake of some music research wasn't too tough. But as more stations did AMT's more frequently, the supply of listeners willing to participate in

the method could not satisfy the demand. New research methods needed to be pioneered to reach untapped listeners for their opinions.

> **Gene Romano:** The challenge is to keep up with how people's lives and lifestyles have changed over the years. Clearly it is becoming increasingly difficult to get people to participate in various research projects. There are certain markets across the country where there is somewhat of a scorched earth. Markets are so over-researched. And *Radio* is partly responsible for that cumulative effect.

As mentioned, there is a finite sample of listeners who will give up a night at home for the sake of a forty or fifty dollar premium to be in an auditorium test. Further, there is a danger that these listeners may be motivated primarily by the cash premium and do not accurately represent a station's real listeners. Listeners who agree to be tested may be unemployed or underemployed and really *need* the money. This group may not properly portray the station's typical listener. The real audience may not need the money and giving up a night from their busy schedule or free time is just too much to ask. As a result, the people participating in the music test may be very different from the station's actual audience.

To achieve greater sample recruiting efficiency, local "field services" are sub-contracted by music research companies to build respondent "panels" or databases of willing research participants. Here's how it works. Field services are hired by a music testing company to recruit a sample of listeners from a given market by calling their database of respondents to recruit them for a music test. These listeners have done tests in the past and calling on them makes it easier for the research company to fill a room with warm bodies. The consequences of going back to the same panel of willing respondents can be daunting. Over-utilized for research, a listener will eventually become a "professional test-taker" whose opinions are sold to the highest bidder. Many professional test-takers are in the databases of several recruiting companies in the market and for them, participating in research is a job they take very seriously. At Kelly Music Research, we always recruit samples randomly and do not maintain respondent databases, but every week we get phone calls from the more aggressive professional test-takers who want to make some easy research money. It is quite commonplace for a research company in any market to receive a phone call like this one that I received:

"Hi. My name is Christine. I'm a white, 36 year old female with five children and I've been in lots of different types of research studies. How much does your company pay people to do research?"

Many local field services would quote Christine a rate and if she liked it, add her to their database to be called on in the future. If Christine can get into the databases of enough recruiting firms in her market, she can easily make several hundred dollars a month or more in research premium income.

Professional test-takers that know they are in short supply often pass on research projects that don't pay well enough. Not only does the professional test-taker drive up the cost of research, he or she develops an atypical attitude with opinions of questionable value.

They may respond in a way they think is expected of them, or in a way that will get them invited to the next test. I've found professional test-takers that have participated in three separate AMT's – one for a rock station, one for a country station and one for a jazz station – all over a 6 week period. And each test was recruited by a different field service! A radio station trying to compete using data from music tests infected with bad samples or professional test-takers is likely to become frustrated with its ratings performance and not even know the cause.

The problem for radio stations utilizing research methods that rely on professional test-takers is that their music test samples may be made up of people who aren't even customers. In a ratings driven economy, *Radio s* only *customers* are those listeners who might participate in Arbitron's research system. If a listener can't or won't participate in the ratings process, they can't affect the ratings. Simply put, conducting radio research with non-diarykeepers is like testing cigarettes with non-smokers. Since Arbitron does not pay significant premiums, professional test-takers are not even likely to participate in the radio ratings diarykeeping process. The Arbitron respondent is not motivated by money and tends to be a different type of person altogether. Listeners who would be Arbitron diarykeepers are the real customers. They hold the keys to the ratings success of a radio station. Uncovering *their* opinions should be the ultimate goal.

GARBAGE IN, GARBAGE OUT.

Everyone is familiar with this saying about collecting information but it is true and requires a considerable amount of control about the research process. Control measures in the research process help ensure that a proper sample of qualified listeners are recruited to participate in the study. Control over the test itself helps eliminate surveys that may not be completed diligently. Control over data entry and tabulation of results provides the opportunity to conduct a final review before results are generated. From the initial design of the research study where sample demographics and listening criteria are established to the finished research results whose data will be used to adjust the radio station's on-air sound, there are a plethora of chances to lose control and endanger the value of the study.

> **Carolyn Gilbert:** I'm a control freak. Research, by definition, means control. Control of the sample. Making sure that the experience of each respondent is as close to identical as possible to that of all the others. Control of the way the data is input into the system.

The research environment must be one where the respondent is comfortable and willing to answer questions honestly. In a group setting a listener may be influenced by actions of those being surveyed around him. Verbal or simple physical reaction such as tapping a finger to the beat may distract another respondent enough to alter their scores. Isolating the listener from outside human interaction using IVR telephone technology can help overcome group dynamic issues. With IVR, listeners hear song hooks over the phone and use their pushbutton telephone keypad to score them. However some worry that depersonalizing the research too much can make the listener uncomfortable.

Lee Bayley: I think doing research with a computer on one end of the phone sets an atmosphere where the participant is not all that comfortable. I think in an auditorium test or a *Living Room Music Test*, you can make it comfortable to relax. "This is not a test, folks. There is no right answer or wrong answer." I can help them understand that more than a computer can. They've got to be comfortable. If they're not, I don't think their opinion is what you want to hear."

FAMILIARITY, APPEAL AND BURN ARE VITAL STATISTICS.

Music research should provide all of the information you will need so the implementation of results will produce the desired effect. Some methods are limited in their ability to measure what I consider the three quintessential pieces of information on every song – familiarity, appeal and burn. Think about a listener in the car with several station presets at their disposal. When they hear a song they will do one of two things. Either keep listening or they will push another button. If they recognize the song, like it and are not tired of hearing it (high familiarity, high appeal, low burn), they will keep listening. On the other hand, there are several reasons someone may tune away. First, they may dislike the song or just think it's okay (low appeal). Second, they may not recognize the song (low familiarity). Third, and often overlooked, they may be tired of hearing a song because it has been played so much (high burn). Songs with high burn may be songs that the listener considers a favorite (high appeal) but they are tired of it, and are likely to push the button to sample the other choices on the dial. The goal of station personnel is to keep listeners tuned to your station. Your research should be designed to project listener reaction to songs. If any of the three statistics are missing from the research plan, you don't have all the information you need to prevent potential tune-out.

Dan Hayden: You need to see Burn in addition to Familiarity and Appeal. The interactive and dial companies are not delivering burn scores. They claim that burn is factored into a low score but I don't think that's actually true because there are songs with high appeal scores that also have high burn scores. Burn is used to put your mix together. When building a category go, you need a certain number of songs. You look for high familiarity, high appeal, and low burn. There is a point where regardless of appeal, you would say burn is too high to play a song in anything but a secondary rotation.

With sound research you should be able to accurately project the opinions from the sample to the audience. As long as your sample test group was gathered correctly, the opinions of the smaller group (your sample) should reflect the opinions of the larger group (the entire audience).

CALL-OUT

Call-out is a research tool used primarily by stations that expose new music. As a weekly or bi-weekly music research effort, call-out helps programmers track a new song's life

cycle. Each week, familiarity, appeal and burn are measured on a list of about 30 songs by playing song hooks over the telephone for qualified listeners. Results are compiled immediately and are used to make adjustments to those songs in current rotation. By using call-out to continually measure audience reaction to new songs, a program director can quickly determine which songs are getting the best audience response. He/she can increase the airplay rotation on songs listeners like and eliminate the songs that may drive them away.

> **Mike Henry:** Call-out is creating and cultivating a database of people that get called to respond to current music. Current research over the phone every week with 100 comers and 50 fans has become a very difficult proposition, but it's an incredibly valuable tool even for stations that play only a fair amount of new music. I think testing currents is very important for stations that have at least 25-30% of their music rotating as currents. It's the only thing that can give you an early reading as to whether or not a song deserves light, medium or heavy rotation.

As more call-out research companies incorporate IVR technology, many potential problems can be overcome. With IVR, the order of the song hooks in the test can be randomized to eliminate song order bias. Further, without a live interviewer on the line, questions can be posed with greater consistency, and without any interviewer bias, intended or unintended.

> **Bob Chrysler:** The biggest problem with live call out is interviewer bias. You have to be careful who your interviewers are. If they are younger and into the format and have passion for the station and are living in the market and doing local call out, they will sometimes skew scores based on their own personal thoughts.

Also, listeners tend to respond more honestly to IVR without the fear of being judged by the interviewer. Garry Mitchell, President of ComQuest and call-out IVR pioneer, points out that other industries using IVR for research found respondents to answer more honestly. Banks and financial institutions discovered that customers felt more comfortable reporting accurate account balances to an IVR system than a live operator. Bank customers feel less embarrassed hearing that their checking account balance is down to $14 if the news is from an IVR instead of from a human. Medical surveys conducted on IVR retrieved more open and honest research from respondents who showed much greater willingness to answer questions regarding highly sensitive issues such as AIDS. So the use of IVR for short form, limited title call-out music testing is quickly gaining acceptance.

> **Carolyn Gilbert:** Call-out is great for current-based formats. I'm NOT a fan of extended telephone testing. Our call-out surveys last no longer than 5.5 minutes. Much longer than that, and you lose them. The use of sound servers allow us to randomize hook order, much as you would rotate a repeated measure list in a perceptual study. This helps minimize the fatigue factor.

Most agree that the best way to use call-out research results is to look for trends that develop over a period of several weeks. Looking at the scores from only one week provide

only a snapshot in the life cycle of a new song.

Dan Vallie: Callout is a priority for current music based stations. But the sample is small which creates a lot of wobbles. My biggest concern beyond the actual credibility of the data is the use of it by programmers that may not understand what they are looking at, particularly individual reports vs. trending.

There are audio quality limitations with call-out. Music over a phone line played through a tiny telephone speaker does not duplicate the audio that listeners are accustomed to hearing on the radio. Catching respondents at the right time can be tricky. In addition, human error on either end of the phone line can affect reliability.

Steve Raymond: Call-out gives you instant response. You know, you're playing hooks for people over the phone, and they say, "oh yeah, I love that song" or "oh no, I'm not familiar." The problem with callout would be not getting the right person or demo. Or, getting the right person in a bad mood. It's really a hit or miss kind of thing.

Occasionally, comparing scores from call-out with other music testing methodologies can reveal big differences in results. Even with flawless design, sample or execution, some music gets lost in the translation.

Steve Warren: As a consultant for Country music radio stations in Dallas and Houston during the development of "Blue" by LeAnn Rimes, a country competitor in Dallas had dropped the record after just a few weeks play. Now, bear in mind, LeAnn Rimes, is from Dallas and she was quite well known. She had been to all the talent shows. She had sung in all the rodeos. She did the National Anthem at a Cowboys game and a Rangers game. And now, little LeAnn has got this huge, huge record and this station in Dallas drops it in a couple of weeks. Why? The callout was bad. Now, fast forward two years and I'm consulting that same station. In an auditorium, Blue tests 13th out of 600 songs. Number 13 overall! I asked the PD what he made of it and he said, "Well, I guess the callout was wrong on that record." But it's difficult for a PD who is spending money on callout, especially if the GM is the kind of guy who comes in and wants to go over the playlist with you. "Well, our numbers are down, and I see you're playing this record, with a 25% negative on it." So the PD ultimately buckles.

AUDITORIUM & CENTRAL LOCATION VS. PERSONALIZED AND HOME

The oldest method for conducting library music testing is the Auditorium Music Test (AMT). A direct descendent of the focus group, the AMT gathers listeners at a specified time and place to evaluate an entire library of hundreds of songs. Typically, listeners are gathered at an auditorium, hotel conference room, or research facility. A close relative of the AMT is the Personalized Music Test (PMT) where respondents may report to several test sites at a variety of times to participate in the survey administered on a personal listening device such as a Walkman™. In both methods, respondents are usually paid at

least $40 per person for the 2 hour test and may also be treated to a meal or snack. While listening to song hooks on a sound system or Walkman, they record their scores on paper, an electronic keypad or an electronic dial.

While the AMT has been around longest, it is falling out of favor with many *Radio* and *Research* veterans for a number of reasons. Recruiting a valid random sample has become prohibitively expensive as listeners who find the method inconvenient refuse to participate.

> **Carolyn Gilbert:** Auditorium testing allows you to measure a large number of hooks by one screened sample. Recruiting is getting more and more difficult. The US is over-researched and over-telemarketed. Additionally, one central location may limit your ability to test a geographically balanced sample. It's expensive, and if you get a "bad" sample, it's even more expensive to fix.

The PMT offers more scheduling flexibility for the respondent, which helps to improve the method's response rate. Since the test is administered using a Walkman™ instead of a sound system at a central location, test sites can be spread geographically across the market to reach listeners in the entire metro.

> **Larry Rosin:** Auditorium has a lot of pieces in the chain where things can happen; a lot of bolts holding it together. If any one pops, then you've got problems. What I developed PMT is a very near cousin of the AMT. The basic idea was to take the hotels and hotel ballrooms out of the package and open it up to people available at different times of the day, and different times a week. The other thing it addresses is the fact that show rates are going down dramatically in auditorium tests. I'd ask no-shows why they didn't come. They'd say, "I could tell hundreds of people were recruited. I figured you wouldn't miss me." So when I gave people time options, they got the idea that they were expected to come. The show rates have gone up dramatically because of that.

The convenience of the PMT also makes it easier on the field services who are sub-contracted to recruit the sample for the test.

> **Lou Patrick:** I was involved in developing the personal music test. In exchange for giving up a little bit of control, what we were able to do was to find field services that were more willing to accept projects. The problem the field-testing companies run into for AMT's is the fact that we are asking for ridiculous screening criteria. They are used to recruiting Coke™ drinkers or cigarette smokers. When you make it really hard on these recruiters they'll tend to cheat more. So the idea of a PMT is to make it a little easier for people to come in and not have everything depend on one night.

When the field service "cheats" and recruits respondents who don't qualify for the survey, it's important to be on hand at the test to at least pick up on the most obvious recruiting violations. The AMT allows the opportunity to see all the people being surveyed while observation of an entire PMT sample can be difficult.

Bob Harper: I am most comfortable with the idea of watching the respondents take an auditorium test. We can eyeball the room and see if this is the kind of audience that we are looking for. We did a classic rock test and the urban representation in the room was way too high. It was easy to eyeball the room and say something doesn't feel right about this. When you do enough of it, you can feel when something is not right.

The geographic limitations of AMT or central location testing make them unpractical in some market situations. Markets that cover a wide area have concentrated neighborhoods of varying ethnicity, age, income level and other factors that may affect the results of a test conducted with a sample drawn only from one part of town.

Steve Warren: I don't think that you can absolutely get the precise sample that you want from auditorium tests. The problem in larger markets with auditorium tests is that the markets are so spread out. You've got a market like Chicago and you want to get people from the whole market. You can't do it, unless you do 5 or 6 or 7 music tests. Hell, it might take someone 90 minutes to get from where they live to your auditorium test. People just won't do it.

Group dynamics can also influence the outcome of an AMT. Even with specific moderator instructions to ask a group to keep their opinions to themselves, verbal and non-verbal signals often occur during a group test that can influence every respondent in the survey.

Tom Bass: I've had issues with auditorium testing, which was always the industry standard. I've spent a lot of money on auditorium tests and responded to the results and not gotten anywhere. I worry about auditorium testing because even though listeners are sitting there and working privately and not discussing things, I am concerned with the herd mentality.

Some broadcasters cling to the AMT approach but others have grown frustrated with its limitations, cost and diminishing reliability.

Bill Palmeri: Auditorium is dead! It's dated, it's archaic, and it just doesn't fit in. There's too much of a chance for people to be influenced by the person sitting next to them. People are not taking it seriously. They're just staring at the clock, waiting to get paid. Auditorium testing was like throwing spaghetti against the wall. Here in the Northeast, the weather made it take forever to complete an auditorium test. It inevitably snowed or there was an ice storm every time we tried to test.

Newer music testing methodologies are causing many *Radio* veterans to re-evaluate the research exercise they go through year after year. Smart broadcasters realize that 100 warm bodies in a room does not necessarily mean that it's a good test.

Mike Harris: I don't think we'll ever do auditorium testing again. We've done it in the past when it was pretty much the only method you could use. The biggest problem that I had with it was the buddy system where the recruiter would not do

their job effectively and get one person on the phone and tell them to bring a friend or two or three which really skews the results.

DIALS AND KEYPADS

The introduction of dials and keypads to auditorium tests puts data entry into the hands of the respondent. Instead of scoring songs using a pencil and paper answer form, some companies have respondents use hand-held electronic keypads (similar to a telephone keypad) or an electronic numbered dial (like a volume knob) to register their opinions. The numbered keypad is used like the phone pad in IVR tests. With a dial, respondents turn the dial to the right for songs they like, and to the left for songs they don't like. These tools make it possible to tabulate results while the test is being completed eliminating any delay for data entry.

Gadgetry adds a certain sizzle to the test and it saves the researcher a step in tabulation; however, it becomes nearly impossible to inspect, detect and reject surveys that aren't completed properly, like you can do with paper tests. If the survey is completed on paper, you can see if the respondent skipped songs or used the same score for every song. In a dial test, listener surveys are not reviewed individually so there is no opportunity to weed out the bogus responses. Further, dials do not allow for recording of all of the vital scoring information including familiarity, appeal and burn.

> **Lou Patrick:** A dial test is a different feel, a different evaluation, than the typical pencil and paper or keypad. Generally, a music test is picking up three elements - familiarity, appeal and burn. So, you go to the dial, you're combining the burn and the popularity together. As a programmer and a researcher I prefer two different evaluations. People can give a five to a song and be tired of it and give a one to a song and be tired of it. If you are deciding on a record, how often are you going to play it? - and for how long? I think that burn is one of the factors that address how long and how often.

With a mechanical scoring device in the hands of a listener, they can become mechanical themselves and drift away from the passionate emotions a music test is trying to capture. The dial or keypad can be mesmerizing to a respondent who might feel more like he/she is playing a video game than sharing his personal opinions.

> **Carolyn Gilbert:** Using dial methodology is, in my opinion, problematic. And I've watched these tests. It's only natural for a person who is using this technique recording responses to think of each hook in relationship to the hook before it: 'I like this one better than I liked that one.' Then, hook order and context become important. This is not good. I think dial technology has great uses for NON-music formats, where relative appeal is important. We've experimented using discrete push-button technology. And I've watched respondents' fingers get "stuck" on one button. Call it laziness. I've never seen as much apathy in a test as in those where we used push-buttons. And side-by-side with scantron sheets, the scores were dramatically different. Much less emotional using the buttons.

TELEPHONE INTERACTIVE

Interactive Voice Response (IVR) technologies have made it possible to conduct an entire library music test over the telephone. With digital hooks loaded into a computer server, recruited listeners can call an 800 number from anywhere and participate in the survey. The computer plays the hooks one at a time and respondents use the telephone keypad to enter their responses and it is not necessary to do the entire test in one sitting. Listeners are assigned an ID number so they can complete part of the test, hang up, then call back and resume until complete. Upon completion of the survey, respondents are paid similarly to an AMT. Telephone Interactive overcomes the geographic and inconvenience issues of Auditoriums.

> **Dan Vallie:** Telephone interactive can get the exact sample you want geographically. It's less inconvenient than having the respondent leave their house and drive to a hotel to do an auditorium test. But it is easier for the respondent to lose concentration since it's not a controlled environment. It's easier to *cheat*.

Listeners may hang up in the middle of the test if they get tired or interrupted and resume at their convenience. Since the listener can participate from anywhere, the sample can be recruited from the entire market or within a station's known "hot zip codes."

> **Larry Rosin:** On telephone interactive, I like the hot zip capability. I think there are human nature elements that I worry about. If I were asked to do an interactive test, I would be watching a baseball game with the sound muted. I would have something on TV. I think, ideally, the environment should be slightly more controlled.

Some express more serious concerns with telephone interactive. Poor telephone audio quality, equipment difficulty and the extreme length of a telephone survey are a few drawbacks to this method. In addition, telephone interactive tests can take over 2 hours to complete – too long in the eyes of many experts.

> **Carolyn Gilbert:** Interactive testing (long-form testing using a call-out, or worse, call-*in* methodology) is dangerous in my opinion. Here you have no control at all. Not over the sample. Not over the environment. Not over data input. And one of my biggest concerns is equipment. All the phones in my house are cordless phones with the push buttons in the hand set. The mechanics of listening to the hook, pulling the phone away from your ear, finding the appropriate key, pushing the button, and returning it to your ear is at least annoying, and at most prone to serious error, boredom, neck fatigue. YUCK! I think the entire concept is full of problems. I don't like it and I wouldn't use it. The results I've seen seem also to be nonsense. 95% of research results should confirm what you already know. We know what tests work. We know what doesn't. And the results here don't look like what I see using other methodologies. Research results I've seen using this methodology raise more questions than they give answers.

For many, being on the telephone is not an experience they want to drag out. One of my best friends lives across the country and if our annual phone call lasts more than 15

minutes I can't wait to hang up. For people like me, the idea of listening to and scoring 900 songs on the telephone for over 2 hours is too much to consider.

> **Carl Gardner:** I'm not wild about doing music research over the phone because I think the experience of listening to music over a phone line is not as pleasant as listening on a radio. You don't know if you have their full attention. My worry is that it could be anybody on the other end of the phone. It could be somebody who starts the thing and then hands it over to their 11 year old daughter to finish it! Those kinds of quality control issues that present themselves are what make me real uncomfortable.

This method may be too convenient, thus sacrificing any control of the test environment. With mobile phones, listeners can participate from anywhere - their car, at work, the bus, a Little League game – with plenty of opportunity for distractions.

> **Bob Harper:** With any call-out, you have no control of anything else going on in their life at the moment, distractions, etc. When you try to expand the process to test your whole library, 350-400 songs, it gets too fatiguing and just doesn't work. I know how inconvenient it is to use my cell phone. Punching in code numbers, taking the phone away from my ear - I just can't visualize it being a good experience for anybody.

I wonder about those who do complete a Telephone Interactive test. Who are they and why do they do it? Is there any enjoyment for this survey or are they just trudging through a long telephone test so they'll be paid? Some may genuinely enjoy it. However if they are only motivated to do it because of the promise of money that they'll be paid upon completion, then those Telephone Interactive respondents fall into the category of "professional test-taker" – a breed apart from the Arbitron diarykeeper.

LIVING ROOM MUSIC TEST

Designed to replicate the Arbitron process, the *Living Room Music Test* is a mail out, diary type survey. Respondents do not need to leave home to participate, so either the entire market or "hot zip codes" of known diarykeeper hotbeds can be targeted. Randomly recruited listeners receive a package at home containing an audio cassette hook tape, instructions, a survey form and a minimal cash gift. The most typical *Living Room Music Test* is 600 hooks and can be completed in about 75 minutes. Listeners score every song for familiarity, appeal and burn. Perceptual questions may be added at the station's option. There is no additional incentive for returning a completed survey. Eliminating the "money bias" makes the *Living Room Music Test* more like the Arbitron process and less like any of the other popular music testing methods. With no cash premium to "buy" completed surveys, it is necessary to recruit more qualified respondents than other methods in order to achieve the desired number of in-tab sample. The extra recruiting cost is offset by the elimination of cash incentives paid. To participate, listeners must have access to a cassette player. Listeners proceed through the *Living Room Music Test* at their own pace and may stop the tape and resume when it is convenient for them. Listening to

music through their own sound system in their normal music listening environment helps the respondent relax and become more comfortable with the survey.

Dave Gariano: The *Living Room Music Test* is so relevant for today's society. If we're going to live and die by the Arbitron sword, then we better be using methodologies that are closer in scope to what Arbitron is using with diarykeepers because that's going to be our judge and jury. We should align with those people who may subsequently take a diary.

The *Living Room Music Test* approach is to target the same type of sample likely to be recruited for Arbitron ratings. By mirroring the Arbitron mail-out survey process, the *Living Room Music Test* experiences the same "non-response" issues as does Arbitron, which is desirable.

Tom Bass: I prefer the *Living Room Music Test* because the personality profile I'm trying to reach is diarykeepers. We want to simulate the Arbitron diary experience. Now, if Arbitron turns around and changes, that's another thing. But the key for us is to adapt a research philosophy that simulates the method to be used to determine our ratings success.

It's impossible to physically observe listeners participating in an *Living Room Music Test* because they are doing it at home; however, verification procedures built into the system help eliminate surveys that may not have been completed properly, or were filled out by an unqualified respondent. For example, questions asked during the telephone screening process must be answered in the same way on the survey form or the survey is rejected

Dan Hayden: The greatest benefit to Living Room Music Testing is that people can take the test in a natural environment when the mood fits them. You haven't caught them at an unnatural time. I haven't seen any downside yet. There is the issue of who is taking the test, but there are safeguards built in for that.

Without any financial motivation to complete an *Living Room Music Test*, listeners either go through the survey diligently or they don't do it at all. As with the Arbitron system, *Living Room Music Test* participation rates vary from about 25% to 45% depending on market, format, sex, and age demographics.

Bob Chrysler: Diarykeepers aren't paid. I think they are people that enjoy being empowered. They are opinion givers and that is a different mind set. Do you want people taking a test just because you're paying them? Or do you want people who are enthused enough about the process to participate, just as an Arbitron respondent would be? The dollar or 2 or even 5 that Arbitron might pay somebody is insignificant. In auditoriums, a certain percentage of listeners are there just for the money. They could care less.

Undoubtedly, the aspect of the *Living Room Music Test* that initially makes some people uncomfortable is the inability to watch listeners do the test. After watching music tests for so many years, it is a big leap for many broadcasters and research experts to stand back

and let the system work.

> **Carolyn Gilbert:** Living Room Music Testing is a viable form of long-form testing. Results from this methodology have been encouraging, but I'm still a little hesitant. My concern is that of a control freak. What are they really doing when they're supposed to be listening to the music? Is the dog barking? Are the kids playing? Is the person who's supposed to be taking the test REALLY taking the test?

The *Living Room Music Test* method relies on the same "honesty" principles assumed by Arbitron: That is, people are basically honest as long as there is no motivation for dishonesty. Arbitron's Bob Michaels responds to the concern that a ratings diary may be completed erroneously by saying, "Look, *anything* is possible. It's *possible* you could walk outside and be hit by an asteroid. But is it likely?" With no promise of post survey payment, there is no financial motivation to erroneously complete a diary or a Living Room survey. The reason listeners do this type of survey is simple: *"I want my opinion to count."*

Quick Fix Silver Bullets

- As a result of increasing intrusions from tele-marketers, listeners have grown uncooperative with music research efforts.
- Professional test-takers may be too dissimilar to a station's audience to garner reliable research.
- *Radio's* only real customers are diarykeepers – those who are likely to participate in the ratings process.
- Control over the music test is essential to its final credibility.
- To properly project listener reaction to songs, three elements must be measured: familiarity, appeal and burn.
- Call-out telephone hook testing is used to track continually changing opinions on a short list of new music.
- Electronic dials and keypads used for music testing limit the types of information that can be collected.
- Auditorium Music Tests gather listeners at a scheduled time and location for a group test.
- Personalized Music Tests offer more flexible time and location options.
- Telephone Interactive is a "call-in" music test conducted entirely over the phone.
- The *Living Room Music Test* is a mail-out survey with cassette tape and survey form.
- Critical components of any music test are; 1) the sample participating and 2) the measurement process.
- The goal of the music test is to project the opinions of listeners who can impact ratings.

What Can Go Wrong? Everything.

Regardless of your research method, there is margin for error. There are so many opportunities for bias, distraction and dishonesty that it can sometimes seem like a miracle to come away with any useful information. One of my associates, Joe Williams, describes every research project as one big "damage control effort." From beginning to end, there are countless opportunities lose control and end up with distorted data. Professional test-takers who really don't belong in the sample, field service recruiters who bend screening criteria to fill quotas faster and competing radio stations that crash your music test all can make the whole research exercise a futile waste of time and money. Even carefully planned music tests are susceptible to disruption when events beyond anyone's control put the process in jeopardy. Our responsibility as careful researchers is to monitor every step and minimize the likelihood of such damage.

KNOWING THE TRICKS

In large markets a single rating point can swing a station's revenue up or down by a million dollars and impact its market value by tens of millions. It can be frightening to consider that the multi-million dollar on-air product decisions hinge on data that may have been collected by college students, high school drop-outs, or call center transients who are typically at the lowest end of the pay scale. With little appreciation for the importance of their task, inexperienced, underpaid and overworked telephone interviewers often don't take their work seriously enough.

Anyone who has spent any time working in the trenches of a call center knows how many ways there are for telephone operators to short-cut scripts, by-pass screening criteria and cheat so that they may fill their quotas and maybe be paid an extra bonus. Such breaches in the system may seem minor on the surface to the interviewer, but can prove disastrous when projected to the big picture.

Interviewers are human. It takes thick skin to put up with the abuse and rejection spewed by annoyed listeners. When working in a call center, burn-out happens quickly and turnover is high. Without close supervision of interviewers, mayhem is more than possible. It is imminent.

Carl Gardner: When I was in college I studied opinion research and was a dual

major Political Science/Communication Research. I had a number of occasions to do interviewing work as a part-time job in college. From first hand experience, I know the temptation to fudge the thing can be very, very strong! It's not fun to sit there and make phone calls and get rejection, hang-ups, striking out on the incidence rate, etc. It is very frustrating. It takes a real dedicated, focused person to work through all that stuff to get to the occasional good interview. If you got half way through an interview and got a hang up, you got a strong temptation to say to yourself, what if I just fill in the rest of these and turn it in.

THE MYTHICAL "CONTROLLED" ENVIRONMENT

One of my neighbors, let's call him Joe Pro, is a professional test-taker. Joe's a really good guy. He's been participating in research projects for years. It's a part-time job for him and he's been compensated nicely for his cooperation. Joe has been in one recruiting company's database for so many years, and he's done so many projects that he knows the recruiter's voice when she calls. Typically, her screening/recruiting call goes something like, "Hi Joe. We've got a spaghetti survey next Thursday downtown. It'll take about 90 minutes, it pays $50 and dinner's free. Can you do it?" In all likelihood, there was a carefully written script that should have directed the interviewer to ask Joe about food preferences, shopping responsibilities, household income, among other details. But for whatever reason, the interviewer has the liberty to circumvent protocol just to get another warm body in the room.

I like to talk to Joe Pro about his music research experiences. My favorite story is the Jazz/NAC music test Joe sat through. Joe is purely a Rock guy – mostly Classic Rock. One night he gets a call from his recruiter who wants Joe to do this Jazz survey. Joe explains he hates Jazz and never listens to it. The recruiter begs, explaining that this has been a particularly difficult recruit. Joe Pro finally gives in and the recruiter tells him how to answer the re-screening questions at the test. "That one was torture!" he would explain to me later. "They gave us these hand held dials to use. For an hour and a half I turned the dial back and forth but I didn't recognize or like any of the music. The girl next to me turned her dial all the way to the right at the beginning and left it on the table the entire time while she filed and painted every one of her fingernails."

The myth of a controlled environment implies that physical presence gives you research "control." This myth would have you believe that because you see people in a room, you should be more confident. The truth is you don't know who they really are, how they got there, or why they're in the room. And the fact that you have HIRED these people to show up introduces even more bias. By offering cash incentives for completed surveys, you give respondents more motivation to misrepresent themselves. Some professional test-takers are willing to go to great lengths (and distances) to be in a paid test.

Bob Harper: A few years ago, we were doing some research in New York for a radio station and had been using a field company on Long Island. For one test we changed and used a field company in midtown. Of the 270 people that the midtown field company had recruited, we found 10 or 12 people who had previously been

recruited by the Long Island field company. As we tracked it down, we found that these respondents were making a living, going around and doing studies. I was amazed at the duplication because of the geographic difference between Long Island and midtown. We need to be aware that there is a whole business dedicated to teaching people how to be professional respondents.

RECRUITING CASUALTIES

If you are doing an auditorium test tied to a specific date and time, you can create your own problem by not selecting the right date. For example, Larry Rosin tells a story about a research company that scheduled an auditorium test in Denver on a Monday night during a Denver Broncos football game. Only 6 people showed up for the test. Inclement weather, holidays, labor strikes and other variables can cause "no-show" problems. Scheduling a test that will depend on specific dates and locations needs careful consideration to be successful.

Some radio research companies like Kelly Music Research have in-house call centers. This provides an extra degree of comfort knowing that our own employees did the testing or recruiting, as I have control. There is a phrase in this business that puts me on alert: "field service." The field service is a company hired to recruit the test sample. Field services all gush volumes about their quality control standards, but mixed in with the very good field services, we have seen some very bad ones. Big name *Radio* researchers have been brought to their knees because of substandard work performed for them by a poor field service.

> **Lee Bayley:** We were doing an auditorium music test in Austin, TX with a reputable radio research company. The rep from the research company asked the group how long they had lived in Austin. 10 years? Hands went up. 5 years? Hands went up. 2 years? Hands went up. He looked down at the front row and said, "You guys haven't raised your hands. How long have you lived here?" They looked at him and said, "We don't live in Austin. We were walking down the hall and a lady ran out and said she would pay us $30.00 if we would come in here. We're from Amarillo!"

Sometimes, field service recruiting violations are easy to spot at a music test. When you have a pretty good idea of what the audience is supposed to look like, physical appearance can provide the tip-off.

> **Jim Smith:** I was doing research for a format leader in a top-five market. They wanted auditorium testing of their library. The station chose field service companies they'd worked with in the past to do the recruiting. Part of my pre-op is to stay in touch by telephone with the companies doing the recruiting to make sure there are no problems. But there were problems. This station was one of those soft AC's. In our front row on the first night were two leather-clad bikers. Think Barbara Streisand, Neil Diamond, Kenny Rogers, then look at these hog-riders. Oh sure, it was no problem to pull out their sheets as all were collected. But if two likely non-qualifiers slipped by, in my opinion the entire sample provided by that recruiting

firm was suspect. Sure enough, as the supervisor acknowledged to me the next day, they had "had a problem." They had fallen behind on our recruiting while working on other projects (while giving me bogus reports of success on my every phone call) and they had panicked at the last minute, doing mall-intercept recruiting on the afternoon of the test, clearly with no regard for the screener requirements. They simply wanted to put warm bodies into the room.

Watching the sample group interact with one another can reveal signs of improper screening. Typically it is not considered a good idea to allow referrals or to let respondents bring friends to a music test. Recruiting groups with similar influences can alter the outcome of a survey.

> **Lou Patrick:** In my days of fielding out research, this field service had checked out very well and they seemed to have really good references, but they went to a database and recruited an entire church group of about 40 people who knew each other! I'm at this music test, the client is there, and people start coming in...it was like a high school reunion...Mary! Bob! Jean!...Needless to say we had to redo the test.

Keeping the recruiting process random is imperative. Some research companies and field services have been known to advertise for respondents in local newspapers. This can dramatically reduce recruiting costs but it introduces a plethora of control and bias issues. It's one thing to have a competing radio station find out about your test and show up in the parking lot handing out their stickers. What's worse is to spot another station's staff *taking your test*!

> **Bob Chrysler:** One time I recognized someone who was an employee at a competitor. He got through the screening somehow and then managed to bring 2 other DJs from the same radio station. Our research company had farmed the recruiting out to a local field service that wasn't as thorough as they should have been. Of course this research company had touted their quality control, yet when called on the carpet, they were bewildered.

OUT OF CONTROL

Sometimes situations arise in test environments that are beyond control. Especially in an auditorium setting where you have a large group of people, all it takes is one individual to disrupt the survey.

> **Mike Henry:** In a music test in the mid '80s in San Francisco, a lady wearing a sort of loose fitting dress just let her shoulder down and started breast feeding her baby during the music test in the front row. Another time, a respondent lit up a joint during the session and proceeded to take a couple tokes and continued with his test. Of course, he was escorted out.

When an entire research project relies on one day, one time and one location, any glitch can create a major problem – for example, a power outage.

Don Hallet: When I was with Saga Communications, I had the experience of finishing a test by candlelight. It was in a huge conference facility in Phoenix. We literally had a blackout at the hotel. They had some emergency lighting, but there was no power for the sound system. The test seemed dead in the water. We decided to break and feed them a full meal. The food was already either out or hot. The program director happened to be there because we were going to conduct focus groups afterwards. He got the radio station van and parked it in the service bay by the kitchen. We started up the generator, ran the power cord to the sound system and asked the hotel for enough little dinner table candles to light the room so we could finish the test.

When doing central location testing, no detail is too small to overlook in preparation. It's a good idea to bring extra survey forms, pencils and moderator instructions. Arrange for a back-up sound system, just in case. Bring duplicate hook tapes and be sure to listen to them prior to the test.

Mike Harris: The night of a test, we got a frantic call from the auditorium. The hook tapes they had were BLANK! There was nothing we could do. It was too late in the day and there was no way to get any other tapes down there. We had to send everyone home and bring them back another day which cost us extra money because we had to pay the listeners the stipend twice. Many people didn't come back the second time and we had to do some re-recruiting on that big blunder.

GROUP DYNAMICS

Throwing strangers together in a room for an auditorium test can create an interesting, sometimes entertaining dynamic. Such a setting can make a group feel uncomfortable. It's important for the moderator to try to make the group relax and have fun with the test...but not too much fun.

Carolyn Gilbert: I remember a group in Dallas that sang along with every hook. . . on key! It was like doing a test with the Supremes or the Shirelles. I had an incredibly good time. So did the respondents. And the scores were some of the best I've ever seen. It was the inaugural test for a station - which, at least at the onset, took off dramatically in the ratings. . . and it was obvious that the target audience LOVED the music.

Focus groups encourage open-ended discussion on many topics. Rather than simple multiple-choice responses, listeners have the opportunity to speak their mind. Often, station personnel attend focus groups to observe the discussion from an adjoining room behind one way glass. It's like being a fly on the wall as listeners air their feelings about your station and staff.

Mike Henry: A focus group respondent started talking about the radio station GM who happened to be behind the mirror. She said, "I used to like that station and listen to it a lot more until I met the GM at a party and he is a REAL _____!"

The GM flew out of the viewing room and went into the focus group room, confronted the respondent putting his finger up to her face and said, "I am not an _____!" and walked out. Our moderator concluded, "Everybody can go home now. It's over."

Mistakes happen. Successful research leaders like John Martin, now President of Clear Channel's Internet division, expect mistakes. As John once told me, "If my people are not making mistakes and experiencing failure regularly, they're not trying hard enough." In order to advance or learn anything new, a degree of trial and error is necessary. Failure can be enlightening. No one is expected to get a hit every at bat. In baseball, you can fail 7 times out of 10 at the plate over a lifetime and still be a sure thing for the Hall of Fame. At Kelly Music Research, we step up to the plate every chance we get and leave "fear of failure" in the dugout. I also like to learn from the experience of others. I participate in other company's research. There's nothing like seeing the process from the other side of the glass. I've been in focus groups for carpet, food, cell phones, and office supplies. I've been an Arbitron diarykeeper. And of course, I've been in music tests – auditorium, telephone, Walkman™-style, Internet, even my own *Living Room Music Test*. It's an important part of understanding what we're asking respondents to do. And because we understand the way the process is supposed to work, it's easy to uncover leaks in the dike. When we see things slip through the cracks in other companies, it helps us focus on the importance of quality control in our own systems.

Quick Fix Silver Bullets

- Every research project is a damage control effort with innumerable opportunities for problems to arise.
- The research efforts of multi-million dollar radio properties are often placed in the hands of call center operators who may have the liberty to cheat on the process.
- No research is 100% controlled. Even if you are watching the test, you know little about the individuals in the room or how they really got there.
- "Professional test taker" has become a part time job for many who bounce from survey to survey for income.
- Potential conflicts must be considered when scheduling research such as community and sporting events, weather, holidays, etc.
- Many researchers employ "field services" who may not share your standards for quality control.
- Common sample recruiting violations include inviting groups to the test or disregard for listening criteria.
- Painstaking preparation is necessary to avoid potential problems. Dry run everything and organize backups before the test.
- Group settings invite group dynamics, which can impair results.
- Watch closely for mistakes in your research process. Learn how to avoid them in the future.

Re-engineering the Music Test

If a radio listener fills out an Arbitron diary in the woods and no one is there to see him, does it count? Of course it does. No one from Arbitron is standing over the diarykeeper's shoulder as the listener completes his or her survey. Yet Arbitron's research process is the basis for *billions* of dollars of radio commerce including everything from advertising revenues to station valuation. Why? It's simple, the system works. I'm not suggesting it's perfect, but it works with enough consistency that Arbitron's at-home, unsupervised survey process has become the trusted standard unit of measurement that is the guideline for the economy of the radio industry. Sure, there have been sample problems that have surfaced and many radio and research professionals like to speak out about small sample sizes and non-response error issues. To Arbitron's credit, they listen and seem to try very hard to improve their research process. In Europe, Arbitron is in the early field testing phase of a "Personal People Meter" (PPM) that listeners carry with them. The pocket size device is designed to record radio frequencies within earshot of the listener. At this point it is premature to say whether or not the PPM will work. Meanwhile in the United States, the mail-out diary is still Arbitron's standard research method of audience measurement.

Arbitron's at-home diary research system determines the financial fate of almost everything that touches *Radio*: employee bonuses and promotions, hiring and firings, station revenues and commissions, network advertising and ultimately the equity value of the station itself. Selected radio listeners who are willing to sit at home and fill out Arbitron's paper survey are determining literally billions of dollars of *Radio s* economy. So one day, I finally asked myself, "Why is radio researching its music *any other way*?" Arbitron isn't herding listeners into an auditorium. They're not doing the entire survey over the phone. There are no referrals, no big cash payments, no field services with professional test-takers in a database. There are no dials, no push-buttons, no headphones, no internet. Arbitron's research sample is a group of listeners willing to participate in a paper survey at home because these listeners want their opinion to count! Wouldn't it make more sense to find *these* listeners and research our music with *them*? For years I had been doing research in auditoriums with groups of listeners who had little to do with the ratings process. We were asking *non-voters* for their opinions. As a result, were missing a big percentage of *Radio s REAL* customer base – the diarykeepers.

HISTORY REPEATS

If you look back in time, you see examples of history repeating itself. In the early '90s, I noticed that Auditorium testing was beginning to struggle with challenges that seemed very familiar to me. Listener enthusiasm for participation was waning, costs were increasing, recruiting was becoming more difficult, and the willing sample started to become much too professional to represent typical listeners. I had lived through these very same symptoms in the 1980s. These were the exact same problems that we had experienced with Listener Advisory Boards. After all, the Listener Advisory Board (LAB) was Radio's early version of a focus group. An auditorium test is like a large scale focus group.

Initially it was easy to recruit listeners to be on the LAB. It was fun and interesting for listeners to give radio stations their honest feedback. After a while, however, we ran out of new people who thought it was fun, so we had to keep bringing back the same people over and over. Soon they would no longer come for free, and we had to pay them - first with albums and food, then station merchandise, and finally cash. Ultimately, they no longer thought and responded like typical listeners, and they started to develop radio programming opinions. We had cultivated PD and MD wannabes whose opinions were very different from those of real listeners. Our LAB panel had become "professional." Hence, we were paying more money for the opinions of people who didn't think or act anything like the actual audience we were interested in. Sound familiar?

Recognizing the path Auditorium seemed to be on, I started to review this method. I looked at each component and thought about how it might be revised to keep it from ultimately derailing. But no matter how I looked at the auditorium framework, I couldn't come up with a solution that would prevent it from ultimately going the way of the Listener Advisory Board. Then came Fort Myers...

ENLIGHTENMENT

I was in Florida conducting an auditorium test for a client. After the test was over, I stood at the back door of the room and watched the respondents leave. As they turned in their completed survey and collected their cash incentive, I started to think about this group. The opinions of these listeners were going to be used to adjust the programming of the radio station. Might these same listeners also have an impact on radio ratings in the market? Or would they, if called by Arbitron, refuse or pocket the measly dollar and toss the diary in the trash?

We understand the Arbitron process. It's like an election determined by write-in voters. However, not everyone is a voter, as they can refuse to participate in the election process. Many listeners essentially waive their voting rights. So if a listener is not an Arbitron voter, should a radio station care about his or her opinion? Is the station getting anything of real value for the cost per individual auditorium respondent? Or are they throwing their research budget to the wind and basing important programming decisions on the opinions of listeners who will never impact ratings?

BACK TO THE DRAWING BOARD

As I compared the auditorium process to the Arbitron process, I decided that the answer to the dilemma was not to fix Auditorium, but to go back to the drawing board and completely re-think and, if necessary, re-engineer the music test.

Re-engineering requires taking off the blinders, dispensing all pre-conceived notions and answering some very fundamental questions. When I began this re-engineering process, the fundamental question to answer was "What is the purpose of music research?"

FUNDAMENTAL PURPOSE

Is the purpose of music research to gather listener opinions? Nope. Is it about building a statistically representative group of known and potential format and/or station partisans? Don't waste your time. The purpose of music research is much simpler than that. The purpose of music research is: TO MAKE THE RATINGS GO UP! That's the finish line in this race. If you lose sight of that very simple premise, you may run off the track or propel yourself helplessly off course.

Arbitron is *Radio s* judge and jury. The courtroom is the living room of selected listeners who volunteer to participate. Like it or not, this system is the standard unit of measurement for *Radio*. Research gurus and Ph.D.s may carry on for hours about Arbitron's sample inadequacies, methodological biases, non-response errors, and so on. But at the end of the day, none of it matters. Arbitron's method and Arbitron's numbers drive the economy of *Radio*. We may not agree that it is the best way, but it is undeniably THE WAY. Arbitron has defined the rules of the game. If our goal is to win their game, doesn't it make sense to play by their rules?

RULES OF THE GAME

The rules of the Arbitron game are as follows. All listeners are invited to play, but not everyone plays. The types of players attracted to this game don't do it for money. They do it so their opinions can be heard - sort of a civic responsibility or empowerment that motivates some listeners. They play at home by listening to the radio, completing a diary, and returning it for tabulation. The players in this game are the only listeners who will affect the final score. So think about it. Wouldn't you like to know what these people, the Arbitron players, think of your music? Thus the birth of a new music research method: the *Living Room Music Test*.

As with any good election poll, the *Living Room Music Test* targets the voters. Voters are the only ones capable of influencing the outcome of the election and Arbitron's voters are the ones who play their game. Listeners who are inclined to participate in Arbitron's process are the only listeners who will impact ratings. The *Living Room Music Test* is designed to replicate the Arbitron process while targeting the same listeners likely to play the ratings game.

TARGETING DIARYKEEPERS

All listeners are not equal. Active listeners who call request lines, play contests, patronize station events and promotions have little or no impact on ratings. The listeners whose opinions matter most are the diarykeepers – the listeners who determine the ratings. If you know the music that diarykeepers like and dislike, you enjoy a significant competitive advantage.

NATURAL LISTENING ENVIRONMENT

Like Arbitron, the *Living Room Music Test* is conducted in the comfort of listeners' homes. Qualified respondents are recruited according to station specifications via random telephone dialing. Those who agree to participate receive a hook tape on cassette with instructions, a survey form, and a small cash gift. At their own pace and in their normal music listening environment, listeners hear song hooks on high quality audio cassette on their own sound system. Using a diary-type survey form, they score each song for familiarity, appeal, and burn. Without the distractions of a group setting, real listeners express honest opinions about music. Most importantly, they are the same types of listeners likely to participate in an Arbitron survey. Utilizing diarykeepers for music research provides a direct pipeline to listeners who influence ratings.

SAMPLE PURIFICATION

In the past few years, the problems that plague auditorium testing have been getting worse. The biggest problem is poor sample. Listener co-operation is at an all time low. Too many listeners are no longer interested in traveling to a hotel alone on a weeknight for a music test. So recruiting companies must resort to data-bases of known research respondents – professional test takers – who participate in research studies for income. How many professional test-takers in an auditorium sample would ever agree to participate in an Arbitron survey for one dollar? Not many. So as a result, critical programming decisions are based on the opinions of people who will have no impact on ratings. It's like running an election campaign catered to the opinions of people who aren't even registered voters.

MARKET COVERAGE

In auditorium tests the recruited sample group is restricted to an area immediately surrounding the test center. It forces the dangerous assumption that listeners in the city, suburbs, and rural areas share the same opinions about music. The *Living Room Music Test* samples the whole market eliminating this potential bias and covers the same area surveyed by Arbitron.

PROVEN PRINCIPLES

The *Living Room Music Test* is based on the time tested research principles of Consumer Panel Research. With Consumer Panel Research, surveys are conducted at home – in the normal product usage environment. Companies like Proctor & Gamble and Westinghouse have been using this method to measure consumer opinion since 1935. When Dupont conducts research on their Stainmaster Carpet, they put it in the participant's home – they don't roll it out in an auditorium. Duracell surveys opinions by giving respondents batteries to use at home in flashlights and smoke detectors. And Calvin Klein tests clothing under normal wash and wear conditions in the home. Obviously, with Consumer Panel Research, you can't watch participants being surveyed, but that doesn't mean you sacrifice control. In fact, virtually every Fortune 500 company uses the Consumer Panel Research method to reliably measure consumer opinion. J.D. Powers and Associates uses a method similar to Arbitron's to measure consumer opinions for the automobile industry – a mail-out paper survey with a dollar enclosed.

SURVEY PROCEDURE

Listeners go through the *Living Room Music Test* at their own pace. If they get tired, they can turn the tape off and go back to it when they're fresh. We ask them to complete it within 5 days. They complete the entire first side of the tape, which might take 30 to 40 minutes. Then after a break, they flip the tape over and listen to the songs on the second side. Typically, people find the process interesting and many choose to do it all in one sitting. After they finish the music portion of the survey, they answer some questions that we use for verification. This way, we know the person who was recruited to be in the survey is actually the one that filled it out. When it's done, they fold up the survey and mail it back to us for tabulation. Since the system is so similar to Arbitron's, we experience similar response rates generally ranging from 30% to 50% depending on market and demographics of the target audience.

CONTROL – DETECT AND REJECT

Living Room Music Test respondents are prepaid. The only money they receive is a small stipend delivered to them up front with the package, thereby eliminating the motivation to return an erroneously completed survey for further compensation. Recruited respondents may request additional surveys for others in the household. However, surveys completed and returned by anyone other than qualified participants are not used. Every returned survey is reviewed and verified for accuracy. Incomplete or erroneously completed surveys are disqualified. Control questions and control instructions identify surveys completed improperly. If a respondent fails at any verification checkpoint, their survey is thrown out. Typically we reject less than five percent of in-tab surveys. We find that pre-payment eliminates most control issues as respondents complete the survey diligently or they just don't do it at all.

DIARY POWER

The *Living Room Music Test* provides a test sample of diarykeeper type listeners whose opinions are most valuable when projecting to the bigger picture. It's not unusual for stations using this method to see 30, 40, and 50 percent ratings increases. In fact, some have become the highest rated stations in America in their formats. The reason is simple. The method is more effective at reaching the listeners who are most list those who impact ratings. Higher ratings translate to revenue increases worth hundreds of thousands, or millions of dollars.

Like many, I initially struggled with the idea of conducting research in an unsupervised environment. Having used the Auditorium method for so long, I too was afraid that the *Living Room Music Test* might not work. It was so different, it represented a tremendous *change*. Change is difficult for all of us but the principles of the *Living Room Music Test* made too much sense to ignore. So rather than becoming paralyzed by fear, I embraced change and gave the *Living Room Music Test* a chance to work. After years of refinement and a multitude of surveys under our belt, the method has never let our client radio stations down. The *Living Room Music Test* is the result of re-engineering music research. Its patented approach is a game played on Arbitron's playing field with Arbitron type players and is winning excellent Arbitron results.

Quick Fix Silver Bullets

- Despite its methodological flaws, Arbitron's unsupervised, at-home diary process provides the basis for billions of dollars of *Radio* commerce and is considered the standard unit of measurement.
- The *Living Room Music Test* is designed to replicate Arbitron's sampling and audience measurement process to achieve greater ratings influence.
- Traditional music testing welcomes respondents who may refuse to participate in the ratings process.
- Unlike other research methods, Arbitron and *Living Room Music Test* participants are motivated by personal empowerment, not money.
- The fundamental purpose of music testing is simple: TO MAKE THE RATINGS GO UP.
- Playing the music research game on Arbitron's playing field can dramatically increase the likelihood of ratings success.
- *Living Room Music Test* response rates closely parallel those of Arbitron.
- Consumer Panel Research used by many companies to test products and services in the home environment.
- Verification procedures provide control measures that eliminate about 5% of in-tab *Living Room Music Test* surveys.
- Radio stations using the *Living Room Music Test* have experienced 50% increases in ratings and revenues.

Fielding the Music Test

At Kelly Music Research, we say there are only three reasons to field a music test: 1. Ratings, 2. Ratings, and 3. Ratings. If your intention is not to affect ratings, don't waste your money. I'm a big believer in clearly defining the destination before beginning the trip. Too many radio stations approach music testing without a clearly defined set of goals and objectives. Unless you are setting specific audience or ratings goals and designing your music test to get you there, you are setting yourself up for frustration. It's easy for a broadcaster to become disgusted if he/she feels like they are wasting thousands of dollars per year on research that isn't moving the needle. The result of a good investment in music testing should pay dividends in profitability and station value.

Essential to a successful music testing plan is to consider where the station is currently positioned as well as realistic expectations of what the station could accomplish. Sometimes the opportunity for growth is obvious, but often it is not. Simply surveying a group of randomly selected people may give you a general direction, but a more scientific approach of profiling the listeners of greatest importance will generate more productive data. To avoid throwing valuable research budget to the wind, precede your music test by answering *all* of the important questions regarding your test: Who is in the sample? What songs? When to test? Where are the listeners? Why do a music test? A crystal clear vision of your destination helps you to execute your plan as efficiently as possible.

TAPPING THE PIPELINE

Knowledge is a valuable commodity that flows through a pipeline. Music research data moves through what I refer to as the "P1 to PD to P&L Pipeline." "P1" refers to a listener who has a first preference or partisanship for a music format or radio station. For example, a WXYZ P1 would be a listener whose favorite radio station is WXYZ. A Rock format P1 is a listener whose favorite kind of music is Rock. "PD" is the Program Director, typically the product manager charged with interpreting and implementing research results. "P&L" stands for Profit and Loss financial statement, also known as the income statement and home of the often-referenced "bottom line." The pipeline contains opinions extracted from the P1 audience. Used properly by the PD, the fuel in the pipeline empowers the air product and drives the P&L and financial value of the radio station. The music research commodity flowing through the pipeline can deliver a real financial windfall if tapped properly. With an accurate understanding of the audience,

one can adjust programming to reflect listener desires and cultivate larger audiences, thus increasing your station's value as a communication and advertising medium.

CUSTOMIZE YOUR TEST

Every radio station's situation is different. Target audience, format, geography (hot Arbitron zip codes), market history, competition and many other factors play important roles in customizing a station's music test. In order to accomplish a successful music test, you must first develop a design to guide your survey. Some may first choose to conduct a market-wide "perceptual" or "strategic" survey to gather listener perceptions about all the stations in the market. Such surveys are typically lengthy questionnaires that probe listener opinions about music style preferences, air personalities, station image, and other issues that may affect someone's inclination to listen to, or not listen to, certain radio stations. Perceptual/Strategic studies can reveal your own strengths and weaknesses as well as reveal your competitor's vulnerabilities.

Dan Vallie: The target audience of the station is determined based on the opportunity in the market, competitive environment, signal, company culture etc. This is usually done with the benefit of a perceptual study prior to the music test. The music test is then designed to determine the specific songs preferred by those defined as the target.

The strategic survey can help you hone in on general music styles that would yield the best reaction from the audience. This approach coupled with a music test helps you to see just how far the target audience will let you go. Testing music tolerances off the air avoids costly errors on the air.

Dan Hayden: I was involved in a strategic test in a market and found a need for a mainstream rock station targeting a 25 and older audience. Listeners were not interested in hard rock, but leaned toward the mainstream, softer side. So we knew we wouldn't be playing Metallica, Guns 'n Roses and Alice in Chains. Then we went ahead with the music test. What came back was a complete surprise. The level of appeal for the pop side of rock went beyond anything that I would have taken out of the strategic study. There was a huge demand for Billy Joel, Eagles, Elton John, the soft side of rock. If we had relied solely on the strategic information, we wouldn't have had the extreme hard rock, but the station would probably still have been too hard for the market. That's where the music test really gave us the other 10-15% that allowed us to pin the needle. It paid off in the ratings.

To get started on the right foot with a new format, research gives stations a decided edge. The combination of a well-crafted perceptual analysis and music test identifies positioning, marketing, promotion and music opportunities that can drive the competition back on their heels.

Mike Henry: We did a very involved strategic process putting a new format on the air for KXL-FM in Portland. We did a market study that identified several format

holes. "Jammin" (rhythmic top 40) was determined to be the best one to go for. Then we did a music test as the station signed on the air. The station went from a 1.2 share to #1 12+ in the very first monthly. If you do a music test while you have the target in your sights and you put the right music in front of the audience, that's the kind of success you can have. Every single one of our most successful sign-ons did a music test before they went on the air. That's how fundamental it is.

SCREENING AND RECRUITING

Once the target audience for a music test is defined, decisions need to be made to determine the recruiting criteria listeners must pass to screen in for the test. Dwight Douglas likes to keep it simple, "Just use the youngest possible and the oldest possible and ask everybody in between." Larry Rosin suggests considering what you hope to project: "Try to create a small group that is representative of a large group."

Setting screening criteria too tightly can intensify recruiting problems and bias the results of a music test. In an attempt to create a more desirable sample group, sometimes stations go overboard with tough sample screening criteria. When this happens, many typical listeners may get filtered out or disqualified.

> **Lou Patrick:** It's incredible when you think about it, a music test has really high standards, much higher standards than most other kinds of research. If you're Coca-Cola and you want to do a taste test, and you're just interested in someone who drinks Coca-Cola, it's pretty easy to find. *Radio* is out there looking for people who love one type of music, only listen to certain stations, are only this age, this sex, live in this area and only eat Corn Flakes in the morning! It just gets ridiculous.

TOO MANY P1'S IS NOT HEALTHY.

A station's P1 audience must never be overlooked in research. These are the listeners who spend more time with your station than any other. However, overloading your test sample with P1 listeners can distort your vision or lead to a false sense of security. A radio station's *real* audience is a combination of listeners who are P1, P2, P3, etc. As important as continuing to satisfy your current P1's is, it is also desirable to increase that P1 base by converting others from P2 or P3 status. To reach those listeners who listen to your station as a second or third choice, you must include them in the study. You then can see what music adjustments you might have to make to get P2 and P3 audience to listen to your station longer. A survey of only listeners who love you and love your music may feel good, but is it the whole picture? Programming consultant Alex DeMers cautions, "If all we talk to are P1's, the station will ultimately implode!"

For example, you own a nightclub and patronage is declining. But when you ask your regulars, the core P1 customers who give you most of your business, they say "It's great!" They may not notice the dirty restrooms and the dusty fixtures. As business continues to decline, you have fewer people that come in. However, when you ask them, they still

don't seem to mind that the food is getting worse, women don't hang out there anymore, and the drunken brawls are getting more frequent. Your core patrons who keep coming in still like it. Eventually, a few P1 patrons get killed in a shoot-out and the rest end up in jail. You are now down to your last core customer. There he is. Your final P1 is asleep on the bar in a pool of whiskey. Are you going to ask him what he thinks of the place?

> **Lou Patrick:** There is a trend today towards lots of P1 research. Well, the fact is that if they are listening most often, they are probably pretty happy, which means they are probably pretty similar to each other, and probably liking what you are doing. We get clients who say, "I want to do a 100 person P1 music test." Well, in an auditorium setting where you are recruiting and paying people to show up, you have a fixed cost for each person…$100, $150, or maybe $200. To recruit 100 P1's when you only need 50 is wasting half your money. Also, it takes a larger sample of non-P1 listeners to represent the opinions of those people who are not listening most often to your station. So if you are doing 60, 70, 80% P1 composition, then you are taking 10 or 15 people who are way different from each other and throwing them into your music test - and I think that's a problem.

Recruiting research samples for a start-up situation where a station has no P1 audience yet is very different from an established radio station in the market. For a start-up, research may be designed around format partisanship instead of station preference. However in most research situations where there is an established station, achieving realistic P1 representation is desirable.

> **Carolyn Gilbert:** The goals should be to know what the core (P1) is thinking and to constantly be moving external cume (P2, P3) toward the core. Therefore, the sample should include a substantial core, secondary and even tertiary cume. The "total" results are certainly interesting. But the smart PD looks at the components of his/ her sample. How far can he/she reach TOWARD the peripheral cume, without alienating the core? If you have boxcar numbers or are totally format exclusive, a 100% core sample is viable. Otherwise, you need representation from your whole audience, as well as that of direct format competitors.

The goal of any radio station's music research is to grow the listenership. Super-serving the people who are your P1's now is very dangerous. It's almost impossible for any kind of product or service to maintain every single customer. If you're not continually looking for new customers to replace the ones you lose, you will eventually spiral down.

SELECTING DEMOS

Every test situation calls for different criteria. Most agree that using broad age groups, such as Adults 25 to 54 in a music test is only appropriate if you have a realistic shot at satisfying a broad demo. When it comes to music preference, a 25 year old has very little in common with a 54 year old. In most situations, a more restricted age group is better.

> **Dan Hayden:** When determining age groups, we want to have at least 40 people per

cell, so we don't want that cell to be too wide. I look for 7-10 years in each cell, like 25-34 and 35-44. If the market is busier and your targeting is more narrow, you might drop it down to a 7-year age spread.

In smaller and medium markets where the direct competition is less furious, stations can realistically target and research listeners in a 15 to 20 year age span. However in the major markets where there may be several direct format competitors and niche formats, the bulls-eye of the target is smaller.

Dave Richards: You want it as tight as possible. I have seen that by shrinking the cells we test and focusing even tighter, we can grow the quarter hours. You can lose some of the cume and grow the quarter hours and the end result is a plus. When a certain cell is under-served in a market, cut off a couple of years and super-serve a 10 year cell, as opposed to a 12 year cell. Divide it up into not 2 but 3 sub-cells. If it's 10 years, go 3, 3 and 4 years in each sub-cell. It gives you an idea of what the low and high end think. If we are doing a 21 to 31 test, we'll look at 24-31 results for mid-day and afternoon and 21-27 for nights. It's just little tricks that we've come up with to really hyper-focus and analyze the research in a bigger market because you can't go wide in a big market.

But going too narrow can be dangerous. Be careful not to over-tighten sample criteria and risk losing sight of reality. In order for most radio stations to thrive, they must be capable of delivering listeners in more than one tight sex and demo cell.

Carl Gardner: I worry when we get our targeting too finite. A lot of programmers want to narrow down to a very, very super tight audience target and will say, "I only want women between these five years, 30 to 34." Not many audiences really look like that. *Radio* is still in a mass audience business in most formats today. It's not true in all situations, but we'll go around and around with questions like, "Do you put only women in the room or only men?" Some people really advocate that you have to make the essence of it pure for that woman who is your target listener. Another school of thought says, look at your audience. It's 40% male. What about them? I tend to come down on the side of to trying to make the sample look more like what your audience really looks like. That is if you have a substantial number of men and women in your audience, have some balance in the sample.

MUSIC MONTAGES OR CLUSTERS

There are times when it makes more sense to recruit a music test sample based on station partisanship. Other times format partisanship recruiting is better. But trying to use both in the same test can bog down the process and impair the results. Format partisan groups can be defined through the use of "clusters" or music montages. A cluster can be made up of 5 or 6 song hooks from a format to define a music style. If a station has been in its format for a while and has built a sizable audience, recruiting based on station partisanship is best. However, if a station is new or does not have much of an audience, it is usually better to recruit listeners based on their general music preferences. When

clusters are played for listeners, he or she can identify the cluster that best represents their favorite music type.

> **Mike Henry:** If it is a station that's putting a format on the air that doesn't have a cume base to recruit into yet, then we typically recruit with music montages. We will come up with a montage of 6 or so songs that reflect the sound of the station that we're planning to launch. We'll put that up against other montages that would compete in that same demo. So it will be a recruit that's relative to what's available within the target demo. What we typically do is treat a 7 or higher on a 10 point scale as if it were a cume base and is required of 100% of the people in the test. The highest rating is considered our fan criteria. We look for 50% fans. By doing so, we build a sample that is analogous to 100% cume and half fans by using the music itself as a recruiting question instead of listenership.

Using clusters for music test screening can be effective, but overused or abused, cluster based recruiting can distort results.

> **Carolyn Gilbert:** I am totally irritated at the consultants who build convoluted screens using subjective music clusters. Then, they want to put respondents through various exclusionary hoops (they have to love THIS cluster, but they can't even LIKE that one). There are a few dangers here. First of all, you're pre-determining your results. If they like THIS cluster, then they're going to like THIS music. Or, you're not dealing with how people actually behave. Radio station choice is often a mood or a need decision. If you need traffic and weather in the morning, chances are you're going to tune to where you're most likely to get it. If you're having a romantic dinner, chances are, you're not going to tune to the station playing Nirvana. By using exclusionary cluster screens, it's analogous to doing a chocolate ice cream study, and including people who love chocolate ice cream, but ONLY if they don't like vanilla too. Silly. My position is, when Arbitron starts asking what cluster they like, I will too. Until then, I'll vote strongly against it.

Some programmers feel that their sample is purer if the group not only listens to their station, but also states a preference for the station's defined music style.

> **Jeff Carrol:** I prefer recruiting a respondent based on both their radio listening habits and their music preference. They've got to be a listener of KLBJ and they've got to show preference for certain types of music. I like to use montages because just the artist name itself can bring up different connotations in people's minds. If I say AC/DC to one person, the perception of that may be completely different than if I played them a song. Or a name alone, like Metallica, if it's not 100% familiar, can scare listeners.

SONG SELECTION

Thanks to digital audio and computer technologies, stations no longer have to go through the torture of creating their own hook tape in their production studio. The process of

manually finding, recording and editing a 600 song hook tape used to take weeks to complete. Now, companies that specialize in hook tape production have easy song selection software that allows PDs to tag titles on their computer and e-mail their list for production. The process now can be done overnight with minimal effort on the part of the station. The station then only needs to decide which titles to test.

A consideration in music testing is the number of songs to include in any one test. Trying to research too many titles in one sitting can be too fatiguing for listeners. If the listeners are overwhelmed with a long survey, the songs at the end of the test can get scored differently from those at the beginning when the sample group was not so tired.

> **Dave Richards:** A big problem with auditorium testing is trying to research too many hooks. You can't exhaust people. They don't want to be there that long. They have a very short attention span. You can't test 900 hooks. That is insane. The ideal number in my mind is 500 songs. Go back in your station's history; look over other radio stations, and determine which areas you can grow. But good Lord! You don't have to test depth songs from one-hit wonders. It is not going to work. Another mistake people make is testing the same lousy songs over and over hoping they might wobble up in one test so they have a reason to play songs they like. I know some classic rock guys who have been testing the same Quicksilver Messenger Service song for years. They're hoping that all of a sudden, 30 years later, it's going to have a life.

It's a good idea to test every song you are playing annually. It is incorrect to assume that because listeners might like a song now, they will always like it. Attitudes about some songs can change in as little as one month's time. Depending on the regularity of testing, the song selection approach can vary. If you are conducting music tests several times a year, it may not be necessary to test all the top tier songs every time. Since test slots are limited, many PDs like to create test slots for songs that have been off the air for a while to recognize emerging or re-emerging music trends.

> **Steve Raymond:** Identify the latest and hottest music trends regionally and nationally and apply some of these songs. Here at WZXL, I kind of know how they feel about Led Zeppelin and Pink Floyd songs. But am I right by putting extra Def Leppard tunes in from 1988? And I've put in a couple of Great White tunes. They're on tour. Motley Crue is on tour. Pay attention to the trends and actually go to the listeners and ask, "Am I hearing right? Is this what you want?"

While a lot of broadcasters look at music testing as a defensive tool that keeps the station from veering off course, I prefer to use music research as an aggressive attack weapon that can propel a station to a new stratosphere. But improvement doesn't happen if the automatic pilot is turned on. No two situations are identical. Even stations whose pattern is to conduct library music research three or four times per year should take the time to ask and answer Who? What? When? Where? and Why? before every music test.

Quick Fix Silver Bullets

- Three reasons to conduct music research: 1. Ratings, 2. Ratings, 3. Ratings.
- Plan every test by answering Who? What? When? Where? and Why?
- Profile listeners by sex, age, and station or format partisanship to create the best survey sample group.
- P1 to PD to P&L pipeline takes research knowledge from listeners, is applied to the air product and improves station value.
- In customizing a music test, format competition, history and geography should be considered to achieve maximum impact.
- Preliminary perceptual studies can greatly improve the efficiency of a music test.
- Overloading the test sample with P1 listeners is usually counterproductive. Strive to convert P2 and P3 listeners to P1 with each test.
- Music "clusters" to define format partisanship are useful for new or under-performing station screening.
- Selecting the right number of hooks keeps the test from becoming overbearing.
- Utilize opportunities to test songs not currently on the air to find growth areas.

chapter 10

Interpretation of Results

Interpreting music research results is simple, but not easy in execution. I've always believed that great radio programming is the result of the proper blend of art and science, 60% art and 40% science a healthy mix. Art is the gut, instinct, passion, emotion, creativity and intangibles associated with making great sounding radio. Science is the facts, numbers and research that hold the business plan together. The struggle is to achieve a proper balance between art and science during interpretation. As with the design of the music test, over-complicating the interpretation process is a detriment to success. Music research results are now impacting radio programming more than ever and are being used for sales, promotion and marketing by radio executives and now many record labels. Of course the consequences of misinterpretation can be frightening at any level. The combination of art and science is a highly combustible mixture.

HERE IT IS. THE SECRET FORMULA!

Sorting music test results can become a complicated process. There are considerations for competitive environment, market size, station history, etc. But the formula for success can be summarized into one simple sentence: "Play the most favorite songs most, and play the least favorite songs least." It sounds so simple, but believe it or not, this is where many people often mess up. So the formula is worth repeating. Out loud this time, and with authority. "Play the most favorite songs most and play the least favorite songs least!" There you have it. You're on your way to doubling your ratings!

The reason implementing this formula is often difficult is that many programmers are more passionate about music than numbers. A passion for music is what attracted programmers to *Radio* in the first place – not statistics. With music research, the emotionally involved PD is suddenly thrust into a role that requires clinical precision.

In the medical profession, surgeons don't operate on their own family because they don't want emotion interfering with an objective decision. Yet in *Radio*, it happens all the time. Emotional pre-dispositions about certain artists, songs or styles often preempt the findings of very costly music research. So, emotional Doctor Program Director is in the operating room peering over the open incision of his beloved music library on the table. His scientific knowledge confirms that there are several malignant tumors that should be

removed. It's decision time. Overcome with emotion, Dr. PD decides NOT to remove all the cancer, sews up the patient, and hopes for the best.

I've found that *Radio's* most successful programmers combine their passion for music with keen objectivity while applying the science of research. They build their radio stations on a foundation of listener desires, not their own or those of industry peers. Look around. Those who have figured it out and apply the secret formula are getting the highest ratings and making the most money.

DKP1 LIVING ROOM MUSIC TEST

To demonstrate actual music test results at a recent NAB convention, Kelly Music Research conducted four nationwide, format specific *Living Room Music Tests*. Since it was a demonstration with no particular radio station in mind, the survey criteria were broad. The formats included Country, Top 40, Rock/Alternative and Adult Contemporary. Internally, these tests became known as our Diarykeeper P1 (DKP1) Living Room Music Tests.

The DKP1s were conducted with men and women between the ages of 12 and 54. We tested 400 songs in each format: Top 40, Country, Rock and Adult Contemporary. We recruited our P1s by placing random phone calls into every market in the country and categorized listeners by music preference (P1) group. We qualified P1s for each of the formats by identifying artist clusters that represented their favorite format type. For example, we identified Country by saying, "a radio a station that plays music by artists like Garth Brooks and Shania Twain." Rock was "a station that plays music by artists like Led Zeppelin or Pearl Jam." Top 40 – "Backstreet Boys and Britney Spears" and Adult Contemporary – "Elton John and Celine Dion." Once our qualification interviews were complete, we put 800 *Living Room Music Test* survey packages into the field.

The three essential pieces of information to consider when reviewing music test results are Appeal, Unfamiliarity and Burn. Appeal measures the degree of like or dislike of a song. Unfamiliarity is the percentage of the sample that doesn't recognize the song. Burn shows the percentage of the audience that is tired of hearing the song on the radio. These measurements are used to project how the audience as a whole might react to each song when heard on the radio. Songs with high appeal tend to keep the audience listening while those with lower appeal, high unfamiliarity or high burn might cause listeners to change radio stations in search of a better song.

On the following tables displaying some of the DKP1 test results, our scores are defined as follows:

MRI (Music Response Index) – Appeal score on a scale of 10 to 110 where 10 = "hate it" and 110 = "like a lot." MRI reflects the opinions of only those listeners familiar with, and not tired of the song.

Burn – the raw percentage of the sample who is "Tired Of" the song.

Unfamiliar – the raw percentage of the sample who "Don't Know" the song.

On the tables that follow, we ranked the songs by MRI or "Appeal" score. The higher the MRI number, the higher the appeal. To show examples of results from the top, middle and bottom of the test, we've chosen 10 songs from each "Appeal Level." The Rank shows where they placed in comparison to all 400 songs tested. A station may divide a 400 song test into four Levels of 100 songs each. The songs in Level 1 would get the most airplay, Level 2 moderate airplay and Level 3 occasional airplay. The least appealing songs in Level 4 may be removed from the station's playlist altogether.

DESIGNING AIRPLAY CLOCKS WITH THE TEST RESULTS

Let's say you have a 25-54 targeted Rock station and you want to implement the results of the Rock DKP1 test on your radio station according to their appeal levels in the music test. (Of course if it were actually your test, you would consider Burn and Unfamiliarity scores as well.) First, divide the 400 song music test into four Appeal Levels. Each level contains 100 songs. Level 1 includes the songs with the highest MRI (Appeal) scores, Level 2 received lower MRI scores and so on.

Then design your airplay clocks to call on Level 1 songs most frequently, Level 2 second, and Level 3 songs third. Songs in Level 4 have the lowest MRI and would not be scheduled for airplay at all. The clock below illustrates that, of the 12 songs in the hour, we would play six from Level 1, four from Level 2 and two from Level 3. Songs in Level 4 would not be scheduled at all because their MRI (Appeal) doesn't meet our minimum criteria.

TOP 40 MUSIC TEST – 12 TO 34

Rank	Song	Artist	MRI	Burn	Unfamiliar
	LEVEL 1				
1	I Want It That Way	Backstreet Boys	94	1%	3%
2	All Star	Smash Mouth	92	0%	9%
3	Livin' La Vida Loca	Martin, Ricky	90	19%	1%
4	Quit Playing Games	Backstreet Boys	90	13%	6%
5	The Hardest Thing	98 Degrees	89	6%	8%
6	No Scrubs	Tlc	89	15%	1%
7	If You Had My Love	Lopez, Jennifer	88	13%	1%
8	I'll Never Break Your Heart	Backstreet Boys	88	14%	3%
9	Fly Away	Kravitz, Lenny	88	15%	4%
10	I Want You Back	'N Sync	88	6%	0%
	LEVEL 2				
125	You Get What You Give	New Radicals	71	9%	4%
126	King Of Wishful Thinking	Go West	71	8%	5%
127	I'm Not Running Anymore	Mellencamp, John	71	4%	34%
128	1999	Prince	70	10%	9%
129	Nobody Knows (Remix)	Tony Rich Project	70	10%	8%
130	Whoomp! (There It Is)	Tag Team	70	10%	3%
131	When Can I See You	Babyface	70	11%	5%
132	A Whole New World	Belle, Regina/Bryson, P.	70	13%	3%
133	Gonna Make You Sweat	C & C Music Factory	70	13%	0%
134	In The Still Of The Night	Boyz li Men	70	6%	3%
	LEVEL 3				
275	Your Woman	White Town	61	11%	8%
276	Kind & Generous	Merchant, Natalie	61	9%	3%
277	Brass In Pocket (I'm Special)	Pretenders	61	3%	24%
278	Where Do We Go From Here	Williams, Vanessa	61	1%	24%
279	Can't Stop	After 7	61	4%	20%
280	All I Want	Toad The Wet Sprocket	61	11%	10%
281	Insensitive	Arden, Jann	61	5%	15%
282	Nothing Even Matters	Hill, Lauryn	61	8%	30%
283	I Will Be Right Here	All-4-One	61	3%	54%
284	Happily Ever After	Case	61	6%	47%
	LEVEL 4				
391	Part Time Lover	Wonder, Stevie	48	5%	18%
392	New	No Doubt	47	3%	34%
393	It Might Be You	Bishop, Stephen	47	8%	18%
394	Seether	Veruca Salt	47	4%	37%
395	Let's Make A Deal	Dangerman	45	1%	51%
396	Where's The Love	Hanson	45	3%	9%
397	Don't Think Twice	Ness, Mike	43	1%	57%
398	Tell Him	Dion, C/Streisand, B	43	4%	22%
399	Stolen Car	Orton, Beth	42	0%	54%
400	Keep Away	Godsmack	41	0%	46%

COUNTRY MUSIC TEST – 25 TO 54

Rank	Song	Artist	MRI	Burn	Unfamiliar
	LEVEL 1				
1	Any Man Of Mine	Twain, Shania	96	8%	0%
2	I Can Love You Like That	Montgomery, John Ml	96	11%	0%
3	Summertime Blues	Jackson, Alan	94	11%	0%
4	Love Without End, Amen	Strait, George	93	11%	0%
5	Mercury Blues	Jackson, Alan	92	17%	3%
6	The Dance	Brooks, Garth	91	2%	0%
7	Tennessee River	Alabama	91	5%	2%
8	My Maria	Brooks & Dunn	91	9%	2%
9	Rebecca Lynn	White, Bryan	91	5%	2%
10	I Swear	Montgomery, John M	90	6%	2%
	LEVEL 2				
125	Alibis	Lawrence, Tracy	80	3%	2%
126	Lookin' For Love	Lee, Johnny	80	6%	0%
127	I Fell In Love Again Last Night	Forester Sisters	80	5%	6%
128	Guys Do It All The Time	Mccready, Mindy	80	5%	2%
129	Rodeo	Brooks, Garth	80	8%	0%
130	Love In The First Degree	Alabama	79	14%	0%
131	Give A Little Love	Judds	79	3%	2%
132	Rope The Moon	Montgomery, John M	79	9%	2%
133	He Stopped Loving Her Today	Jones, George	79	5%	3%
134	Seein' My Father In Me	Overstreet, Paul	79	3%	12%
	LEVEL 3				
275	That's My Baby	White, Lari	73	6%	14%
276	Like We Never Had A Broken	Yearwood, Trisha	73	0%	14%
277	(Without You) What Do I Do	Tucker, Tanya	73	6%	8%
278	Let Me Tell You About Love	Judds	73	2%	5%
279	Let That Pony Run	Tillis, Pam	73	5%	11%
280	I Got You	Shenandoah	73	0%	14%
281	Wild Man	Shelton, Ricky Van	73	0%	8%
282	You Don't Count The Cost	Dean, Billy	73	5%	14%
283	You Have The Right To Remain	Perfect Stranger	73	5%	8%
284	Take Me As I Am	Hill, Faith	73	3%	3%
	LEVEL 4				
391	I Know How He Feels	Mcentire, Reba	64	0%	9%
392	Maybe Your Baby's Got The...	Judds	64	2%	11%
393	Bend It Until It Breaks	Anderson, John	64	3%	0%
394	Put Yourself In My Place	Tillis, Pam	64	2%	12%
395	Where've You Been	Mattea, Kathy	63	2%	6%
396	Gone As A Girl Can Get	Strait, George	62	3%	8%
397	One Love At A Time	Tucker, Tanya	62	5%	15%
398	Something In Red	Morgan, Lorrie	61	8%	6%
399	One Man Woman	Judds	61	2%	9%
400	Soon	Tucker, Tanya	61	2%	8%

ROCK MUSIC TEST – 25 TO 54

Rank	Song	Artist	MRI	Burn	Unfamiliar
LEVEL 1					
1	Another Brick In The Wall	Pink Floyd	89	7%	0%
2	Comfortably Numb	Pink Floyd	89	0%	5%
3	Black Dog	Led Zeppelin	88	5%	0%
4	Walk This Way	Aerosmith	88	5%	0%
5	Rock & Roll	Led Zeppelin	88	7%	2%
6	Jumpin' Jack Flash	Rolling Stones	87	11%	0%
7	Money	Pink Floyd	87	7%	0%
8	Rebel Yell	Idol, Billy	86	11%	0%
9	Honky Tonk Women	Rolling Stones	86	9%	0%
10	Old Time Rock & Roll	Seger, Bob & The Silver	85	32%	0%
LEVEL 2					
125	Who Are You	Who	76	9%	0%
126	No Matter What	Badfinger	75	2%	2%
127	You Make Lovin' Fun	Fleetwood Mac	75	11%	5%
128	Bungle In The Jungle	Jethro Tull	75	7%	5%
129	Rhiannon	Fleetwood Mac	75	7%	0%
130	One Thing Leads To Another	Fixx	75	5%	2%
131	Mama Kin	Aerosmith	75	2%	16%
132	Listen To The Music	Doobie Brothers	75	14%	0%
133	Refugee	Petty, Tom & The Heart	75	2%	2%
134	Desire	U2	75	11%	5%
LEVEL 3					
275	Welcome To The Jungle	Guns N' Roses	69	5%	2%
276	Where Streets Have No Name	U2	69	5%	5%
277	Saved By Zero	Fixx	68	2%	9%
278	(I Just) Died In Your Arms	Cutting Crew	68	2%	0%
279	Wherever I May Roam	Metallica	68	7%	25%
280	Down In A Hole	Alice In Chains	68	0%	34%
281	Twice As Hard	Black Crowes	68	2%	11%
282	Thunderstruck	AC/DC	68	7%	7%
283	1979	Smashing Pumpkins	68	0%	7%
284	Sledgehammer	Gabriel, Peter	68	9%	2%
LEVEL 4					
391	Celebrity Skin	Hole	56	0%	27%
392	More Than Words	Extreme	56	5%	5%
393	My Friends	Red Hot Chili Peppers	55	0%	18%
394	Marrakesh Express	Crosby, Stills & Nash	55	2%	2%
395	The One Thing	Inxs	54	5%	11%
396	Elderly Woman Behind The...	Pearl Jam	53	9%	27%
397	Children Of The Sun	Thorpe, Billy	52	0%	34%
398	Black Gold	Soul Asylum	52	0%	25%
399	The Dope Show	Manson, Marilyn	46	2%	11%
400	Intergalactic	Beastie Boys	41	0%	39%

ADULT CONTEMPORARY MUSIC TEST – 25 TO 54

Rank	Song	Artist	MRI	Burn	Unfamiliar
	LEVEL 1				
1	*In The Air Tonight*	Collins, Phil	94	8%	0%
2	*Candle In The Wind (Live '87)*	John, Elton	93	7%	0%
3	*Imagine*	Lennon, John	92	1%	0%
4	*Another Day In Paradise*	Collins, Phil	90	3%	0%
5	*In Too Deep*	Genesis	90	4%	0%
6	*Faithfully*	Journey	89	4%	6%
7	*Forever Young*	Stewart, Rod	88	6%	0%
8	*Tonight, Tonight, Tonight*	Genesis	88	10%	0%
9	*Stand Back*	Nicks, Stevie	88	4%	4%
10	*Best Of My Love (2)*	Eagles	87	7%	0%
	LEVEL 2				
125	*Uptown Girl*	Joel, Billy	78	17%	0%
126	*In The Summertime*	Mungo Jerry	78	8%	3%
127	*Anything For You*	Estefan, Gloria & Miami	78	3%	4%
128	*Let's Stay Together*	Green, Al	78	3%	4%
129	*We're All Alone*	Coolidge, Rita	78	15%	0%
130	*Hero*	Carey, Mariah	77	6%	3%
131	*If You Don't Know Me By Now*	Melvin, Harold & Blueno	77	14%	0%
132	*Save The Last Dance For Me*	Drifters	77	7%	8%
133	*Total Eclipse Of The Heart*	Tyler, Bonnie	77	6%	0%
134	*Save The Best For Last*	Williams, Vanessa	77	7%	0%
	LEVEL 3				
275	*Something About You*	Level 42	71	3%	6%
276	*Mercy Mercy Me*	Palmer, Robert	71	6%	0%
277	*Walking In Memphis*	Cohn, Marc	71	4%	17%
278	*I See Your Smile*	Estefan, Gloria	71	3%	8%
279	*On My Own*	Labelle, P/Mcdonald, M	70	0%	4%
280	*Son-Of-A Preacher Man*	Springfield, Dusty	70	8%	8%
281	*Abc*	Jackson 5	70	13%	0%
282	*The Things We Do For Love*	10cc	70	11%	0%
283	*Can't Help Falling In Love*	UB40	70	3%	3%
284	*Crazy*	Seal	70	0%	31%
	LEVEL 4				
391	*You Are My Lady*	Jackson, Freddie	59	6%	6%
392	*Dirty Laundry*	Henley, Don	59	7%	6%
393	*Damn I Wish I Was Your Lover*	Hawkins, Sophie B.	59	8%	31%
394	*Ooh Aah... Just A Little Bit*	G., Gina	59	0%	44%
395	*Every Time I Close My Eyes*	Babyface/G., Kenny	58	0%	31%
396	*Open Up Your Eyes*	Tonic	55	1%	50%
397	*I Like The Way (The Kissing)*	Hi-Five	54	0%	49%
398	*Kiss*	Prince & The Revolution	54	1%	11%
399	*Fraise You*	Fatboy Slim	52	0%	58%
400	*Men In Black*	Smith, Will	50	3%	24%

Song	Appeal Level	Title	Artist
		Rock Format - Sample Hour - Based on DKP1 Music Test Results	
1	1	Another Brick-In The Wall	Pink Floyd
2	2	Who Are You	Who
3	1	Rebel Yell	Billy Idol
4	2	No Matter What	Badfinger
5	1	Walk This Way	Aerosmith
6	3	Welcome To The Jungle	Guns N' Roses
7	1	Jumpin' Jack Flash	Rolling Stones
8	2	One Thing Leads To Another	Fixx
9	1	Black Dog	Led Zeppelin
10	2	Bungle In The Jungle	Jethro Tull
11	1	Old Time Rock & Roll	Bob Seger
12	3	Where The Streets Have No Name	U2

Implementation of results in this way gives most frequent exposure to your listeners' favorites and lesser exposure to the songs in lower Appeal levels. This is a very basic example of how a station sorts, filters and interprets music test results.

Not long ago, producing printed tables for a music test required volumes of pages with every conceivable perspective on the data. With the proliferation of computers and spreadsheet software, we can now save a few trees. My partner Jim Williams wrote the *Analyzer* program which puts volumes of research data into a format that is easy for computer beginners to embrace. Using "point and click" and "drag and drop" features, programmers and consultants use *Analyzer* to filter and sort music tests in a fraction of the time the process used to take with piles of paper printouts.

TRUST THE NUMBERS

To maximize the impact of music research, a proper implementation strategy should be developed. It's important to consider the station's position and competitive environment when determining how broad or loosely data can be interpreted. A new station or one with low ratings will want to play more power rotation songs (powers) whose appeal is highest. Exposing more powers from Level 1 is intended to make as strong an impression as possible on the audience.

Dan Vallie: There are many "right" ways to implement a music test. A debut station will want tighter standards and a tighter music library due to the fact its immediate goal is to grow cume [raw size of audience]. Each song has to be great and contribute to creating the new station's identity and position. A heritage radio station may be primarily looking at burn scores for songs to rest or new oldies to freshen the library. Here is a rule of thumb way of implementing music test results. First find the average score for the test. On the first pass, find songs that score above average in each discreet demo cell and with the station's cume or core. Those become powers [Level 1] as long as burn isn't high. In the second pass, begin to find songs that test well inside the core demo target that may not score well in each

demo breakout. These become secondaries [Level 2]. Remember to also set a familiarity threshold, such as 90% for the first pass, 80% for second pass. Finally, make a judgement call as to whether the song fits the essence of the station. If it does fit play it, if it tests but doesn't fit the essence, don't play it.

If your station has established clocks, categories and rotations already in place, proper implementation of music test results may require changing one or more of some of your predetermined rules to accommodate the results.

Mike Henry: When you dump a music test on your desk and you've got your rotations already in place and a library in place, sometimes they don't connect. You don't have enough songs coming out of the music test with high enough appeal to pass the bar you've set. You've either got to go in and start changing some of the formatics of the rotations or the clocks, or you've got to go back to the music research and lower the bar. When that situation occurs, I recommend the station change the clocks and play fewer songs. The tighter the playlist, the more familiar it is, the higher the ratings. As soon as you go back to the research and start lowering the bar, you're really starting to work against the natural order of things.

Another approach is to alter the allowable airplay criteria to clear enough songs to fill the category. Depending on the number of songs you may need to fill out a category, you would raise or lower the bar until the categories are complete.

Dan Hayden: When we begin to sort a music test, we start with the music categories and the format clock. If your categories are divided into eras and you know you're going to be playing four '70s songs an hour, you're able to calculate how many songs you need per category. To achieve a 24 hour rotation for songs in your '70s category, multiply songs per hour on your clock (four) times desired rotation in hours, 24. You need 96 songs in your '70s category.

Resist the temptation to justify playing a song on the air that is clearly unpopular with the listeners. This is a common mistake among programmers who are emotionally attached to songs or artists. It can be difficult, but here you must put your own feelings aside and do what the audience wants.

Lee Bayley: Very, very important — look at the bottom of the music test. The trouble songs. Get them off the air before you do anything else at all! Then I look at overall appeal and the appeal in smaller cells. There is an expression you hear a lot: "Paralysis by analysis." You try to read so many different pieces of information, it gets to be confusing. I am a proponent of not overcomplicating the implementation of results.

SPLITTING HAIRS?

With a music test sample of 80 people, you've got to be careful not to cut the pie into pieces that are too small. Some like to break the test into age, sex and partisan segments

to compare results and make final decisions. By cutting the total sample in half, for example men compared to women, you've created a sample group of 40 which carries a significantly higher margin of error. Dividing that group into age cells or P1/P2 groups further reduces the sample size in each segment and makes the data in these small cells statistically unreliable.

> **Larry Rosin:** PDs do too much analysis of music testing. I field phone calls from clients saying, "Can you rerun the data off these 16 people because I'd really like to see what they thought." Typically, I try to ward them off. There's a reason you bring in 100 or so people - to look at the broad perspective and hear what the general group thinks. PDs need to spend more time working on morning show, production, promotion, overall station sound, feel, direction and strategy. Some guys spend too much time sitting in front of the computer looking for the perfect segue that is going to lead to ratings. There's a helluva lot more to making a great radio station than dicing and slicing.

If the sample was constructed properly in the preparation phase of the music test, your total group should be a close replication of your actual listening audience. If so, you can feel comfortable looking at your total sample and projecting that data to your audience.

> **Carl Gardner:** It's a mistake to break results into a lot of sub cells. I think if you put 100 people in a room, the goal ought to be to make almost all decisions based on the total score. Don't say, "I can break out this sub group of 20 and another of 15 and another of 40." Use the total score. The bigger the numbers the better, and anybody that studied statistics understands that. You want the largest possible sample before you start relying on the data to make a decision for you.

Sorting a music test requires setting the bar at different data points to distinguish groups of songs that will get more or less exposure on the station. At those division points it is often helpful to filter the data down to see how the important sub-groups reacted to the song.

> **Lou Patrick:** I don't like to see people use total sorts. Total sort is great to weed out the crap. But, it isn't going to help you much when you look at the middle stuff. That's when you start to say, 'let's look at this competitor, and that competitor.' Then as the programmer, you are making an informed decision. I need to have 60 powers or 120 secondaries to make my rotations work. There is no way to say, "Geez, this song has a 3.84 and this song has a 3.83, so I'll play one and I'm not going to play the other". . . that's insane. There is just too little difference there.

TRUST YOUR INSTINCTS

Sometimes seasoned veterans of music testing see scores that just don't look right forcing them to make gut-wrenching decisions. Research can help you make some decisions, but even the most carefully planned test may occasionally produce results that don't agree with your trained eyes and ears. For the novice, it's safer to stick with the research.

However, the most successful experts know exactly how and when to rely on instincts that may tell them to deviate from research data.

Dave Richards: Fortunately, radio hasn't reached the point where it is 100% research. You can't go by research alone. You better have some gut. If you are doing call out, you know certain bands don't call out for a long time. Certain songs never call out, but are still a success. Living and dying by the research and being inflexible usually results in a very boring radio station. I dumped an entire test one time. It was at the peak of when grunge gold mattered more than any other genre of music. Yet, every song tested below the line. We reviewed it and finally said, forget it. We went with our gut and every last bit of information we could pull from the last test and we moved on.

LABELS EMBRACING CALL-OUT

After struggling with research for so many years, the record industry is trying to understand it and use it as a promotional and marketing tool. They, too, are recognizing the value in learning more about potential audiences. Labels also see that *Radio* is using research more and applying science to music decisions that until recently were based more on emotion than information.

Fred Deane: Record companies now advertise and promote call-out scores. They want to be a part of the call out equation when the call-out scores are strong. When a record is looking like it's going to be a hit, call-out scores can make or break it. Call-out can turn a top 20 into a top 10, top 5 or #1 record. Or it can kill a record in the 20s if it's not calling out well.

The record industry would like to see radio stations exhibit a little more patience with new music during the early research weeks. *Labels* fear that if research doesn't produce immediate positive call-out results, some PDs may drop songs prematurely.

Scott Douglas: Once the record starts to test, we spend a lot of time collecting those stories and spreading them around to people. But the hardest part is keeping a record alive long enough to get a fair read. Sometimes *Radio* tends to be impatient. If they don't feel like something has legs early enough, they'll bail out of it. If you do reach and frequency calculations to find out how long it takes before the average listener hears a song 3 or 4 times, I would say it's at least 100-120 spins.

CLUSTER STRATEGY – THE BIGGER PICTURE

Many PDs must now consider multiple stations in a market cluster. With several stations in a market under the same ownership, programmers are negotiating with a new set of rules when applying music research results. Programmers are being asked to be careful not to step on the toes of a sister station while attempting to obliterate a competitor in a similar format. The new playing field in each market has more competitors on it, only

some of them are now teammates. To be successful in market clusters, you've got to remove the blinders and employ more peripheral vision. Cluster strategies also require more careful planning in advance of the market research effort with communication among all of the managers and programmers in the cluster. Without careful consideration for the bigger picture, stations within a cluster may end up cannibalizing each other without any net gain for the cluster.

> **Gene Romano:** As a PD you have to get your hands dirty by getting into the matrix and not researching yourself into a very narrow dark corner. Depending on the competitive matrix, you need to go forward in your implementation in such a way that addresses your Core and your Cume. You can't just look at the overall numbers. You need to go into a narrower cell and keep in mind what your programming strategy is, especially relating to your cluster. If you have a Rock partner in your cluster, what is the acceptable threshold of sharing between the 2 radio stations? How does partisanship break out? There are so many different layers of strategy that you need to keep in mind when you interpret your research and then go to implement it.

MUSIC TESTING IN THE HANDS OF SALESPEOPLE

An interesting approach to bolstering station "value" in the eyes of advertisers and buyers, not to mention your own sales staff, is to share some test scores with them. Advertising reps at radio stations are typically adept at understanding numbers. They can add value to the sales process by helping advertisers understand what goes into developing a highly successful radio station serving the needs of the market.

> **Joe Gallagher:** Music research can give your sales staff confidence in the product and gives them the ability to be aggressive on rates. Typically, sales forces that have a solid product, believe in it, and understand how it gets ratings, are going to do a better job at selling. We have clients as well as media buyers who are really into certain formats, whether it be Country, Rock, CHR, or Triple A. Lots of people are very personally and emotionally involved with music. Here is an opportunity for your sales staff to be able to interact with clients at another level by showing them how you created your ratings, how you attracted your audience, and what makes up your product. Share the music research with them. When you put this stuff in front of them and they get to look at scores, it's fun and interesting. Buyers want to get that kind of treatment from your radio station. It helps encourage the bond.

Proper interpretation of music research is helping those in music related businesses develop a better understanding of the market. With more reliable information, the risk of mistakes and failure can be dramatically reduced. Those who are embracing its power quickly understand the competitive advantage furnished by music research.

Quick Fix Silver Bullets

- Great programming blends art and science. Applying the scientific research should be simple, but is seldom the case.

- Secret formula for research interpretation: Play the most favorite songs most and the least favorite songs least.

- Emotional detachment is necessary to make competent, objective decisions.

- Divide music test results into groups of songs of similar Appeal Level. Song categories should be managed on clocks so the most popular songs get the most airplay.

- Excessive Unfamiliarity and Burn are potential reasons a listener may tune away. These factors should always be measured and considered.

- Filtering research data into small sub-groups decreases the reliability of data in individual cells.

- Music research is now being used by the Record Industry as an effective promotion and marketing tool.

- Consolidation has created new playing fields and rules in markets with multiple stations in the cluster. Cannibalization must be kept to a minimum.

- As a sales tool, music research adds credibility and value.

Internet Research :
The Future is Not Now, Not Yet

There is little doubt that the Internet is growing at a rate exceeding most people's expectations. In the early '90s Internet users were mostly computer geeks. But in the last few years it has become more mainstream. Worldwide, adults, teens and children embrace the Internet as part of their everyday lives. The Internet started as a communication medium carrying electronic mail messages back and forth between users. By the late '90s there were so many people connected to the world-wide web that e-commerce became attractive to thousands of businesses around the globe. At the turn of the century society is now using the Internet to buy and sell cars, clothing, food, travel, financial services, books and music, to name but a few things. But radio or music research on the Internet? Many radio stations are already streaming audio on web sites. There are research companies now testing music at web sites. Worthwhile? Reliable? There are more questions than answers right now but all agree - the Internet is here to stay.

As the barriers to access crumble, the Internet is growing at the speed of light. But what is it and where is it going? Is the Internet a medium of communication, entertainment, information, advertising, or commerce? I suspect all of the above and more. Ultimately, every industry will feel the effects: *Radio*, Records, Television, Telephone, Print, Retail, all seem the most obvious starting points.

> **Lee Bayley:** The Internet is a source of music. My son-in-law hops on the Internet every couple of weeks and downloads England's top hits. He's not buying them. He's just getting them free. I think record companies are going to have a real challenge in that area. From the listener's point of view, though, when he downloads (unless he is carrying his laptop) he doesn't really have that source of entertainment. So he's got to go back to radio. I'm not sure where it's all going to end up, but I do know it's already hurting record companies.

There is no blueprint yet for the successful melding of *Radio* and Internet. In fact, the sketch is still being drafted in pencil with lots of erasers close by. No one knows when, how or even *if* it will ultimately make sense for *Radio* to dive head first into the web. In the meantime, some major broadcast companies are positioning themselves for a strong Internet presence when the time is right.

Gene Romano: We could close our eyes and believe *Radio* and Internet can work on parallel universes, but that's the wrong approach. Clear Channel obviously has huge investments in various Internet activities. Some of the other broadcast companies do too. The reason? Future partnerships.

INTERNET RESEARCH PLATFORM

Some believe the Internet will not be an effective vehicle for the purpose of radio research. Dwight Douglas feels that the Internet has no effect on research nor should it. "The Internet is a place to sell ideas or things and will never be a safe place to conduct research outside of consumer questions of those who are engaging in the commerce."

With regard to Internet research, many radio and music survey issues remain unsolved at the dawn of the 21st century. Like the studio request line, problems such as self-selecting sample, duplication, respondent identity, and many other control matters make for questionable findings at on-line research sites. Too many people still don't have access to the Internet and even if they did, what type of person is likely to search out and participate in a music survey? Is this the same type of active listener who will seek out and call a radio station request line? If so, there is plenty of evidence to demonstrate that these active listeners can be very different from listeners who affect ratings.

Gene Romano: There's nothing out there right now that makes complete sense. To ignore Internet feedback though, would be like saying you're not interested in what people have to say when they talk to you on the street. Internet is a small part of understanding people and their opinions about various things. Better or worse than a request line? I'd probably say, "As bad as."

While the Internet does not appear to be the most efficient way to reach out to the passive audience impacting ratings, most feel that there is great potential in using the Internet to communicate with the active listeners.

Dan Vallie: The Internet will affect music testing much like it is affecting everything else in our lives. The Internet *is* a paradigm shift that the world has made. It is inevitable that practically every station will do tests via the Internet. It's where the listener/consumer is. It plays to their convenience instead of the convenience of the radio station. It's not inconvenient like an auditorium test and it's not intrusive like a telephone call. The Internet will continue to weave into the very fabric of our daily lives to the point that it is natural and we don't give it a second thought. Every station will broadcast on the Internet. Every station will do some kind of music/audience research on the Internet. The Internet will become a distribution source to deliver radio programming and is the method radio has been searching for to "touch" the listener with direct contact.

SAMPLE ISSUES

Self-selecting sample is currently one of the biggest concerns of Internet-based research. Since many people are still not connected at all, the pool of potential respondents is limited. Hence, it is currently not feasible to create an Internet sample that is an accurate representation of a radio audience.

> **Steve Warren:** The problem with the Internet right now is that you're getting respondents who contact you. This is not reliable research. You have to make the contact. You have to find the sample and select it to get an accurate reading.

"Active" radio listeners devote a lot of their time calling a radio station's request line. Often Actives are like "groupies" who play the station's contests, go to promotions, and like to participate in activities involving the station and/or its music. Because the Actives are so vocal and ever present, a station can perceive that the Active audience is larger than it really is. For most stations however, the Actives represent less than 5% of the total audience. Most listeners just listen.

> **Bob Chrysler:** A lot of *Radio* actives are also Internet actives and can do both at the same time. They tend to be younger demos. We are not doing any music testing on the Internet at this point. We are still playing with it and experimenting to determine how we can best do it, yet maintain control. We've come up with traditional recruiting, via telephone screening and then have them log onto the Internet and participate at their leisure. We validate that they are who they say they are once they are on the site.

TESTING THE WATERS

Some early pioneers of Internet research for *Radio* have conducted and are still conducting on-line surveys. The data from such on-line testing is crude, but not totally unacceptable information. Perceptual questionnaires answered on the Internet seem to be producing responses that align with expectations which gives hope to the notion of on-line testing.

> **Gene Romano:** Something we were doing in Pittsburgh for a number of years with our website was letting our audience rate song titles. We did a very simple 1-5 scale and said, "Here's some songs we play, let us know what you think." Just titles no music. What we got was certainly questionable research but the response was amazing from people who wanted to participate. A recent Internet survey by Arbitron revealed listeners like to give their thoughts about the music that you're playing. The opportunity to vote on songs was the 7th most important thing they viewed a radio station should offer on their website. It was well ahead of contacting the DJ, information on artists, purchasing station stuff, buying various products or services. 47% say they want input versus 15% reporting that they're currently getting that feature from radio station websites.

In markets where Internet penetration is higher, more radio and music related experiments are being conducted utilizing the medium for promotions and research.

Dan Hayden: On WDHA in 1996 we did some Internet research. WDHA is in the affluent, well educated Morris County, NJ. In this project, we gathered data by mail and on the website. When the data were analyzed, the big picture was pretty much the same. We didn't see any big differences. That study was part of a promotion where listeners rated 105 artists. We took the data and analyzed it to give us a sense of what the cume looks like. It is difficult to control sampling on the Internet, but the plus side is the sample is so big, it smooths out some of the rough spots that you may have if it were a small sample and you were getting people not properly qualified.

BIGGER (UNCONTROLLED) SAMPLE IS NOT BETTER.

On-line music testing is not getting the warm welcome some had hoped for. Downloading audio hook files still takes a long time, even on fast computers. Currently, one of the most popular on-line music research sites runs a 35-song test that took more than 30 minutes for me to complete. The same 35-song test might take 4 minutes on the telephone. The novelty of participating in an on-line music test may get the curious to try it, but web-surfers grow restless if the wait is too long.

Questions also remain about the identity of who might be casting votes in an Internet test. Since the sample selects itself, there is great vulnerability to pranksters or competitors that may be interested in distorting the results. And a larger sample size alone does not make the data significantly more reliable. Statistically, the margin for error of a sample size in the hundreds compared to a sample in the thousands is only different by a few percentage points.

Al Boettner: Radioresearch.com first started off with the idea that they could produce long form music studies on the web then realized that people are not really willing to sit in front of their computer for hours to do that. Also, what you don't have with that is control of who is taking your study. Their view is to flood it with 5,000 respondents, figuring that within that you are likely to get who you need. And even if an enemy station is trying to infiltrate, they're not going to get enough respondents to affect it. That concerns me a little. I am used to respondents being carefully screened. In the big picture, there is a built in weakness of not exactly knowing who is behind the keyboard, taking your study. It probably is someone who is obsessive with music. But getting the average Joe who we get in music studies, is a different thing entirely.

In its current form, Internet music research is extremely vulnerable to mischievous or malicious tampering with the study. Allowing the sample to select itself leaves it susceptible to unwanted participants who may easily stuff the ballot box and distort results.

Carolyn Gilbert: I'm certain that this will be viable in the future. But right now, it's also dangerous. First of all, there's no control. Band-width for most users makes the

process incredibly tedious. Personally, I'm in one company's Internet database 14 times. How long would it take the record companies, or savvy PDs, knowing who's doing this testing, to infiltrate and corrupt results? Control, control, control. It's also not anything LIKE a representative sample of potential diary keepers. It's people who have access to the Internet. But we're working on it. And we're getting ready to do tests in the near future. While 100% Internet samples won't be viable until there's 100% user penetration, certain things will be viable on the Internet in the near future.

MARKET PENETRATION

Cost efficiency of Internet music research is attractive. For the most part, the cost of the study is fixed regardless how many people participate. But until the right people participate, the data has questionable value.

Ed Shane: Ultimately people will be doing their research on the Internet and it will be effective. Anybody who does it now and for the next 2-3 years, until we have sufficient penetration of Internet use, will be testing Internet users and not radio users. They will have to be very careful with that. There's a great economic wave to use the Internet for research because it doesn't cost us anything. The great cost is you're not getting the typical P1 user. Even in the highest connected Internet city, you can't do music research effectively because you're not getting everybody you want in your database. I think it is sufficient to view it as another request line and it is a neat way to communicate with your audience. In terms of research, until everybody who seems to be a P1 to your station gets on line, you'll lose a lot of people.

Market penetration of internet accessible listeners is an issue today, but wireless connections and Internet connected cars are not far off.

Lou Patrick: The Internet will take over eventually. It's going to get harder on the phone. It's easier to attract people and the panel building process is just made a whole lot easier with the technology of the Internet. Probably what will happen in the interim is a combination of the Internet and the telephone. It is not just going to be something that you have to have a $2000 computer or a modem or a $20 a month account to access. There will be other technologies that will come along that will allow you to have Internet access. The Internet is going to get into the car and while I think that has impact on *Radio* in general, it also has impact on the research worlds. It becomes a tremendous opportunity.

Radio stations are taking advantage of the opportunity to bond with listeners over the Internet. Through open communication, the station/listener relationship becomes stronger and helps to solidify the radio station's position.

Jeff Carrol: We'll be able to be in touch with our audience a lot more. They'll be able to interact and tell us how they feel about our current songs, make requests and

maybe even do tests. They may not be as reliable, but you may be able to touch more people that way. We are using the Internet for suggestions, to rate records and chat a bit so people can talk with DJs about certain songs. It is just another tool, like phones at this point. It seems to me that comments come a lot more freely than they do over the phone. I guess people may feel more comfortable if they stay anonymous. It's such an easy thing to do.

SNUGGLING WITH THE BEAST

Is the Internet friend or foe? We don't know yet. But like nuclear power, we must recognize its capability and work with it. *Radio* can only hope that it becomes a tool that will help us, not a weapon to be used against us. To ignore the Internet would be a huge mistake. Clearly, it's not just a passing fad.

Tom Bass: The day will come when your transmitter goes down and you might just leave a post-it note on the engineer's door, "By the way, the transmitter went off." But if the network server goes down, you'll be paging everybody and their brother. We don't think of the Internet as a promotion tool. It is a new medium. I don't know what's stopping this from becoming the primary delivery system. You're going to have digital radios in your cars and houses. Half of our modern office buildings, you can't get a radio signal in. A lot of things are working against *Radio*. I don't think *Radio* is ever going to go away, but it will face some competition.

Some believe new technologies will revolutionize the media by allowing the users to think differently about their entertainment. Audiences will soon be capable of customizing a music sound that is perfect for them, an audience of one.

Gary Krantz: We've got the traditional media, *Radio* becoming increasingly more researched and much more careful about how they make music decisions. At the same time, you've got well-funded new competitors in Internet radio, who are from all indications, approaching it from a much different perspective. They are throwing it completely upside down by turning it back to the listener, which might be the ultimate research, and saying, "You create your own radio station." You can hear the music you want to hear on your own Internet radio station. It's like the early '70s when FM took over. You were so used to listening to an AM station. Then all of a sudden, found the FM station. I think that's the kind of experience you're going to get with CD radio, Webcasting, etc. I'm more excited about the business now than I ever was. I think that the opportunities are greater. Even with consolidation and with increased research, the onus on creativity will get greater.

The potential market for online radio is yet to be determined, as is the usefulness of research conducted on the Internet. But make no mistake, accessibility and portability issues will be resolved. As Internet penetration continues to grow, it will become an undeniably valuable method of contacting and communicating with radio audiences and music test samples.

Quick Fix Silver Bullets

- The rate of Internet growth is staggering. Its use for communication, commerce and entertainment is becoming a significant part of almost everyone's life.
- Current penetration levels inhibit the Internet's capacity to construct a valid sample group for research.
- Self-selecting "Active" samples participating in Internet research is reminiscent of radio station "groupies" calling request lines.
- Communicating with Active listeners via Internet can be a good marketing angle.
- Even though Internet research samples are larger, the margin for error is not affected greatly.
- On-line studies are susceptible to survey tampering.
- Experimentation through trial and error makes the Internet an exciting new frontier loaded with possibilities.

chapter

12

Quick Fix to Eternal Success

Getting the product right is fundamental to the success of a radio station. The music on the air is the primary reason listeners choose or ignore a radio station. Music research is a tool that puts you in touch with your market and keeps the line of communication open. Getting the listeners and holding them is the name of the game. The competition is no longer friendly. The financial stakes are higher than ever and complacency will get you killed. Consolidation is not cause to sit back and relax. New competition is emerging. The winners are pushing harder, looking for better ways and setting new standards for success. Once restricted to a limited number of major market radio stations, music research is now touching radio markets of all sizes, the print media, and the recording industry. Those who employ research properly have gained a decided edge over those who don't.

OWNERS CAN CHAMPION ADVANCEMENT

Sometimes owners of smaller, privately held radio companies are the first to break from the crowd and cut a new path. Individual owners don't have to deal with the issues and pressures that face larger companies with lots of stockholders. These owners who are operating free from outside pressure and intimidation seem more willing to initiate changes and champion advancements. Gary Fisher of Equity Communications and Phil Giordano of Calendar Broadcasting are just two examples of this fearless approach to competition. Both owned stations (WAYV/WZXL and KBFM/KTEX respectively) that were market leaders. But they refused to be paralyzed by their success. Instead, they investigated and adopted new approaches to market research and escalated their station ratings by 40% to 50%. These kinds of results are usually attainable only by those willing to break the pattern and embrace a new approach. The sole owner with an eye on the big picture doesn't fear for his or her job. Instead, the aggressive competitor is always looking for better ways to keep the product in sync with audience desires.

> **Joe Gallagher:** Doing music research, especially for general managers or owners who don't know the format, provides a sense of security that the product team, is on track. *Radio* is a team sport the way I run it. You've got to have a product side, a sales side, engineering and a front office staff. If you want to make a lot of money, you need to know that everyone is on the same page. To me, music research pro-

vides an integral part of the blueprint.

A station that has never done research can use it to jump start the station or take it to a new level. After that, making research part of the game plan keeps the station healthy and less vulnerable to competition.

> **Carl Gardner:** Music testing is one important tool of many that you use to understand listeners and help you to make product decisions. As this business gets ground down to finer and finer targeting schemes, the importance of the data increases. Nothing is 100% infallible or foolproof. No one music test is the gospel. I think the more precise your targeting scheme is, the more important it is that you have research and refresh it frequently.

Station owners whose hard-earned money is on the line see research as an investment, not an expense. The value of the music a station puts on the air is an asset. Setting specific goals and improving the station's product are expected to pay dividends.

> **Dave Gariano:** Music testing is absolutely essential to being at the top of your game. If you want to be the best, then you better ask listeners for their opinions. From a smaller market owner's perspective, it's amazing to me that in 1998 we were the first in our market to do any music research. People asked, "Why are you spending all this money?" Well because it's like filing a flight plan. We want to know that we're going to reach our destination. And we're not going to get there by guessing. There are still so many people that just look at music research as an expense when it is an investment in their future. If I can go to sleep at night knowing that we're doing what we need to be doing, then I'm happy.

FOCUSING ON THE AUDIENCE

Without researching the market, you run the risk of driving far off course. Rock programmer Harve Allen professes, "Not testing your music is comparable to shooting a gun in the dark. You have no idea what you are shooting at or how far off you are from hitting your target." In the Radio business, if you don't nail your target, your competitor will. To stay connected to the audience, *Radio* needs to create opportunities to touch the listeners.

> **Dan Hayden:** If it's not a remote or listeners coming into the station to pick up contest prizes, many station don't have much worthwhile listener interaction. You see it in music research results and hear it in focus groups. It is good to hear it directly from your audience. Doing research gives you a link to your audience.

Stations invest heavily in marketing and promotions to drive traffic to their radio stations. Unfortunately, if the music is off target that money is wasted.

> **Joe Gallagher:** If you are a music station, you're all about the music. You better make sure you're playing the right music BEFORE DOING ANYTHING ELSE!

Stations budget for promotions, advertising and marketing. In my mind, the product needs to be right first.

Radio s top programmers use research like a surgeon uses instruments. Without them, attempting to operate is futile. In the most competitive environments, the winners have all the tools and understand how and when to use them.

Dave Richards: If you are in a cluster situation protecting sister stations or flanking or in head to head competition, you need to know where you are, how much you can grow and where your soft spots are. I don't know how anyone can survive without research. I really don't. I would not want to go to a radio station that doesn't do research. You can use marketing to bring listeners to your radio station, but the only way to keep them is with quality programming.

IS PASSION GOING...GOING...GONE?

Radio s growing reliance on music research has made life for many record industry executives more difficult. For many years, PDs made music decisions with little regard for listener opinion. Record labels convinced radio stations to play their songs with enthusiasm and by building strong relationships with the decision-makers. *Radio s* move toward information based systems is creating fear for many in the record industry that *Radio* may become more comfortable being market driven than driving the market.

Instead of lamenting about the past, some record labels are beginning to see that they too can use research for their benefit. Music research has created a new "language" at *Radio* that many in the record industry don't yet speak or understand. Smart label reps are taking the time to learn the terminology of P1, P2, Core, Cume, and TSL. They're learning the Arbitron game, margin for error, sample size and demo cells. With a grip on the research language and concepts that now drive *Radio*, the record industry can re-open relationships that had hit a brick wall when the station proclaimed "We're not playing it because it didn't test well."

Fred Deane: In the record industry, we're seeing less hype and a more scientific approach. Some promotion reps are walking around with facts and figures about how many spins a record had. They want daytime dayparts. They do not want overnight spins. They're measuring the collective cume of radio stations on a given record. The younger guys coming in are learning at an early age in their academic lives that computerization, classification and categorization are important things in the business world. The new business world is office computer, home PC, laptop, and electronic organizer.

EXCITING ERA OF COMPETITION.

The excitement of new research and technologies may have a tendency to make some people over-reliant on them. We've seen how over-dependence on music research can

make a radio station sound sterile. Developing a great radio station takes more than coming up with a list of the most popular songs. While the music is the primary drawing card, the elements between the records, the attitude on and off the air, and many other intangibles contribute to building a strong and loyal following for a radio station.

Carl Gardner: What I notice today is that we have a generation of programmers who have been reared in the research era, and have had tools like music computer scheduling systems. What I find troublesome is that some of today's programmers, when having product difficulties, tend to think that the answer is to chunk down the microscope and look at even more minute details of rotations, scores and burn. I frankly think that in most cases today, the answers are not in the greater minutia but are in the broader picture. I often say to people in my company that *Radio* is a picture that's painted in broad strokes and bright colors. The winning stations are winning on things other than a few micro-millimeters of a difference between whose music scheduling scheme is tighter than the other guys. I don't think that's what makes the difference between the winner and the loser. I think it has more to do with your position, marketing, stationality, morning show and how well you have developed and communicated a brand.

If we've learned anything from research, we've learned that music testing alone is not enough to win radio wars. If it were, audiences would prefer an endless stream of appealing, familiar music and nothing else. When that approach has been tried, it has failed miserably. Research has told us that listeners want more out of *Radio*. They want the excitement and vibrancy that living, breathing, creative individuals inject. They want music they enjoy but listeners also expect *Radio* to provide non-music entertainment, information and spontaneity.

Carolyn Gilbert: I believe that research is a tool. Like a hammer. You can take a hammer and precisely tap a nail into a wall to hang a picture. And you can take the same hammer and knock down the wall. The best PDs use the science of research and the art of what they know to create the sound of the radio station. If it was all the research, we could just upload the results into Selector and push "go." It's not like that. There's flow, era, texture, mood, and artist balance. I have the utmost respect for the great PDs in our business. . . Jim Ryan, Marc Chase, Jack Evans, Tom Poleman, Tom Owens... who know exactly how to create art out of the science of research. Research is a tool. And once we've delivered accurate, representative results, it's up to the craftsmen in our business to create the magic that is a well-programmed radio station.

New technologies are giving birth to new challenges and new competition for *Radio*. For music entertainment there are a growing number of options such as webcasting and satellite delivered audio. These new advancements are sure to shake up the industry and shake out those who can't stomach turbulence.

Ron Rodrigues: I couldn't be more thrilled to know that there are thousands of alternatives to radio that are coming on line. It scares some people, but *Radio* needs to remember that just like 50 years ago when TV came on, it's not the only media

around. And I hope these new media are going to give the industry a wake up call and make *Radio* more competitive. A lot of these web-based radio stations don't have the kinds of restrictions that the radio industry has, either FCC or stockholder pressures. Web-casts are going to be put on by ad hoc DJs who might be 13 years old working out of their bedroom with their CD player and little web server on their computer. A total investment of $100 and they have a radio station! It is those types of mini broadcasters that are going to make the radio industry realize it is going to have to sound a lot less homogenized and be a lot more creative in order to attract and keep the ears of listeners.

Thanks to emerging technologies, we now have more data collection options that are better suited for *Radio s* goals. Analysis, interpretation and implementation occur with laser precision at lightning speed. We are living through an amazing technological and communication revolution. Beepers, wireless telephones, computer, Internet, and satellite are changing the way we live our lives. This period will be written about in history books and studied in high schools. It's exciting to be in the midst of it. This is an invigorating time for anyone with a pioneering spirit. Through all this change, the listener has remained constant. It is still, and always will be, the researcher's job to find the listeners who impact the business of *Radio* and measure their opinions. They are the voters, the only listeners who can sway the election in your favor.

ETERNAL SUCCESS

Is music research really a silver bullet? Yes indeed. So powerful it can elevate you from where you are now, to where you'd like to be quickly and eternally. It can give you the strength to subdue foes and keep enemies at arm's length. With the research silver bullet you can command the respect of your peers and the admiration of your followers. But be careful. Like all weapons, if mishandled, the silver bullet can kill you without warning or remorse.

Research is information. Knowledge from this information applied properly can make you more efficient and get you to your destination faster than the other guys. Don't allow research to become a crutch used only to justify your actions or inaction. Use research as an offensive weapon to empower you and give you a competitive edge. Research is not a scapegoat. If you don't achieve your desired objectives, there may be something fundamentally wrong with your procedure. And research is not the recipe, but an ingredient to success. It must be carefully measured, balanced and blended with creativity to achieve a superior finished product.

The proper approach to conducting the right research in any given situation will vary depending on factors such as music format, target audience, market geography, and budget. Whatever your research costs, it's much too expensive to be wasted. You will derive exactly what you put into it. If it is hastily thrown together, the results will be scattershot. If the method is flawed, so will the data. If it is cheap, it won't be worth the paper it's written on or the disk space it consumes.

An effective research strategy begins with an attitude. You must need and want more than you already have. People ask me, "How can you possibly help us? We've been doing research for 15 years!" I respond by suggesting they've actually been doing research for one year, fifteen times over. They're using the same methods, the same people and getting the same results. Surprised? No. This behavior is insane. Here's how I define *Insanity*: "Repeating the same actions over and over and expecting the results to change." The only way to change the result is to change the action. Recognize that as long as you keep doing what you've been doing, you'll keep getting what you've been getting. And if you aren't satisfied with the results, make some changes. Once you are willing to embrace change and set new standards for success, you can propel yourself to a new hemisphere.

The 21ˢᵗ Century is opening new doors for anyone brave enough to enter. Change is happening at breakneck speed and the only way to keep up is by accepting change and arming yourself with as much good information as possible. This is not a time for the faint of heart. And it's not a time to venture out empty-handed. To succeed you need to focus on your destination, develop a solid strategy and pursue it relentlessly using every opportunity to gain an advantage. To advance, you need to think and act differently, which means you must change. Change is simple, but not easy to implement. Change requires courage when you know that at least initially, you will fail more often than succeed. But change is not something to be afraid of. Without change, the learning process stops. So make some changes. Embrace change. Learn from it. And soar. You may even surprise yourself.

"Hi-Yo, Silver!"

Quick Fix Silver Bullets

- Music is the primary reason listeners choose a favorite radio station. Research helps select music best suited for the target audience.
- The investment in research pays dividends in the form of larger audiences, higher advertising revenue and increased station value.
- Operating a radio station without dependable market information leaves you vulnerable to competitors.
- Marketing can encourage listeners to try a station, but unless they like what they hear, they'll leave quickly.
- Research must be blended with creative elements on radio to avoid becoming bland.
- The record industry is beginning to embrace research and learn the language to better communicate with *Radio*.
- Emerging technologies are creating new audio entertainment competition for *Radio*.
- Results can only be changed if procedure is changed. To drastically improve results, your process must be significantly altered.

Contributors

For this book, I called on some of the sharpest minds in broadcasting. Thank you to all who contributed to the effort. In alphabetical order, and in their own words, they are:

Tom Bass, Operations Manager WRKI Danbury
Started hanging out at the local AM station cutting their grass and the afternoon guy showed me how to run the board. One day he didn't show up and they called me in. Worked at WSFL, WZYC, WHCN, WPLR, WWWV, Charlottesville, VA for my first PD gig.

Lee Bayley, Lee Bayley & Asssociates, Owner, President and Consultant
Hung around favorite station when I was 15 years old and was on the air when I was 16. Was a chief announcer of morning drive in weekly television show for the Caribbean forces network out of Panama, doing the same thing Robin Williams did. Bill Drake hired me to do RKO stations and develop Drake Chenault with staff of Jeff Pollack, Bob Kingsley, Cal Casey and other greats. Since 1981, consulting Country, AC, News, Talk, Full Service, Oldies.

Al Boettner, President, Autohook
Hired by WEZN, Bridgeport in 1976 as an overnight guy. Owner, Dick Ferguson asked if I'd like to start a news department for the station. Then Dick started buying radio stations as Park City Communications and when he bought WAAF and WZZK, he asked me if I would like to go onto the corporate side and start doing some research. Now running Radio's original hook company.

Jeff Carrol, Operations Manager LBJS Broadcasting Co.
In radio 25 years, 17 at KLBJ and very proud. Austin's rock leader in all 17 years. Have done significant fundraising for terminally ill children the last 5 years raising $30,000-$50,000 each year. Very rewarding.

Bob Chrysler, Director of Programming LBJS Broadcasting Co.
1979 got in the business while going to school. Started in Miami at a top 40, 96X, then Y103, Metroplex, WRFX, Capital Broadcasting, WGFX. Put WAFX on the air and debuted #1 in every demo with an 11.2 share 12+. Bought WJXY in Myrtle Beach, SC and sold it. Came to work with the Johnson family and Bob Sinclair.

Fred Deane, Executive V.P./General Mgr., *FMQB*
Got into the music industry in 1979. Marketing and promotion EMI, RSO, Polygram. Became Executive Editor with *Friday Morning Quarterback* under Kal Rudman. Now running both Album and Top 40 operations. Most proud of keeping my sanity in a business that changes by the minute and bringing *FMQB* into the '90s as a cutting edge publication that affects many people's professional lives in our business.

Dwight Douglas – Program Director, WZGC Atlanta
Participated in the real birth of FM radio in America. Pittsburgh, Washington, and the rest of the country consulting for Burkhart/Abrams. Now in Atlanta with CBS/Infinity.

Scott Douglas, Vice President, Island Def Jam Music Group
Spent the '80s at the KAT in Oklahoma City. From part-timer to PD taking it from 4.7 to 7.8 in one book. Started record promotion in 1990 for Charisma, Virgin Records. Went to Epic Records, then Island.left. Was part of #1 singles Maxi Priest, "Close to You" and Brother Kane "And Fools Shine On".

Bob Dunphy – President Dunphy Media Strategies
An early programmer through the back door, almost literally, of the call-out room in 1979. Greater Media for 5 years in Los Angeles, Philadelphia, suburban New York, then to WZZP Cleveland. Went to New York for Bonneville, and blew it up firing one of the largest cannon shots through the Beautiful Music tug boat. Now consulting AC stations on Internet, programming and marketing.

Tom Evans, Affiliate Relations/Comedy Manager, United Stations Radio Networks
Did radio in college at University of Tennessee then WNNJ in New Jersey. I did the Mid Atlantic tour including WWWV Charlottesville, WQDR Raliegh, WRXL Richmond, and WIYY-98 Rock Baltimore. I consulted for Harris Communications then ran my own consulting firm before joining United Stations Radio Networks.

Erica Farber, Publisher and CEO, *Radio & Records*
Most proud of staying employed for 28 years in Radio. I spent time on the station side, national rep side and now on the reporting side. We provide various points of view and information to the Radio industry to help people make the most informed decisions they can. I've been *R&R s* publisher officially since 1995.

Joe Gallagher – President/CEO Aritaur Communications
Since the early 1980s, I've owned, operated, bought and sold many radio stations including WZXL in Atlantic City, WWRX Providence, WBEC Pittsfield, WCAV Brockton, WMVY Martha's Vineyard, to name a few. Through the purchase, development, and then sale of radio stations, I've achieved an average sale price of 7 times the original purchase price.

Carl Gardner, President of Radio, Journal Broadcast Group
In radio for 22 years out of Seattle as a DJ and news reporter. 1982, programmed News/Talk and full service radio for 6 years then GM with Taft/Great American Broadcasting in Portland at KKRZ. Summer, 1991, came to work here in Milwaukee as GM WTMJ/WKTI and started to build the radio group. Became Executive VP then President.

Dave Gariano, President of Super Spots and Calibre Communications
Started in Radio in 1972 at the ripe old age of 16 in Las Vegas. Research director under John Sebastian and Steve Casey. Super Spots for the past 8 years now moving to station ownership.

Carolyn Gilbert, President, Critical Mass Media
This is like my "third child." I started the company. I've seen it through infancy, adolescence, and now, there are days when I almost recognize an adult. I am proudest of our people. Passionate. Committed. Determined to do the best job they can. We don't consider ourselves a "big" company. Internally, we still play the underdog, always looking for ways to be better.

Don W. Hallett, Consultant, The Positioning Works
Penn State University, 1980. WXLR, WEZX, WKRZ, Eastern Broadcasting, WSNY. Fall of 97, opened The Positioning Works specializing in marketing, programming, research, morning talent, promotions, Internet and community service designs.

Bob Harper, President Bob Harper & Co.
Radio since 1964. PD for ABC, Cap Cities; part-owner of WKHQ in Michigan in 1980. Programmed 140 stations for TM Programming. Director of radio for Frank Magid Research Co. Part of the development team behind ABC's "Rockin' Stereo". The format was for stations such as WRIF Detroit, WPLJ New York and KLOS Los Angeles. They changed their call letters and converted all their stations to "Rockin' Stereo." It was really a revolutionary idea and I credit Hal Neil, Allen Shaw and Bob Henaberry. We were all a part of that, along with the late Rick Sklar. I started the research arm of Noble Broadcast Group and then Bob Harper & Co in 1983

Mike Harris, President WEOK Broadcasting
I've been in the business for 22 years, in management for 17. The company includes WEOK, WPDH, WCZX, WRRV, WRRB, WZAD, WALL and WKMY. We caught the wave of consolidation here in the Hudson Valley and put together a super du-op and a group that really dominates the market.

Dan Hayden, President, Pathfinder Consulting and Research
Got started on Armed Forces radio in 1968 during the height of the Vietnam War. First job stateside was WHTG, Asbury Park then to Dayton, Providence, WCCC and WHCN, Hartford as PD. Transitioned AOR from progressive roots to mainstream and had 13 consecutive ratings increases. Began consulting for Beck Ross, converted WCRZ from beautiful music and debuted with a 15 share, the highest rated AC in the country. Since 1987, Pathfinder Consulting and Research servicing more than 50 radio stations including major broadcasters in the US and Europe.

Paul Heine VP/Executive Director, *Friday Morning Quarterback*
WCMF Rochester in 1977 as an air talent, then to WBUF and WGRQ Buffalo and rose to MD then PD. Joined *FMQB* in 1985 as assistant editor. Recently interviewed Howard Stern, Mel Karmazin and Don Buchwald together in one session!! At *FMQB* we've raised the bar for rock trade publications.

Robert E. Henaberry, Bob Henaberry & Associates
In 1948 I got into the business, worked in Pittsfield, MA, moved to Detroit in 1954 and 11 years later, went to Boston for WRKO and took that station from Talk to Top 40 in 1967. Went to ABC as program development manager. ABC's "Rockin' Stereo" format was basically a structured version of Tom Donahue's off the wall KSAN San Francisco in the 1960s. Tom would do things like report the price of dope on the street that day as a public service announcement. In 1974, I opened my own business. Now, I'm 72, semi-retired and it's a very comfortable and enjoyable experience.

Mike Henry, Managing Partner, Paragon Research
Began Radio in my late teens doing programming and sales 6 or 7 years. Ended up in Atlanta at WSB AM/FM. In 1985, went to Surrey Research and had a lot to learn. Paragon started in 1988 for stations in US, Canada and UK. We now do cable, newspaper, Internet, all media. It was really an alignment of the stars when I was able to be a part of a team of people in Denver that put on KXPK, The Peak.

Gary Krantz, VP Progamming Music & Entertainment, AMFM Radio Networks
For 17 years, I was the GM for MJI Broadcasting. Agenda chair for the Country Radio Seminar for 2 years. Member of the John Bayliss broadcast foundation, and currently on the executive committee of Country Radio Broadcasters. I moved to AMFM in 1996 and currently oversee all of the programming syndication for the radio network.

David Leach, Executive VP, Island/Def Jam Music Group
Started in 1977 as a merchandiser in Boston. At Polygram in 1980 moved to Philadelphia for local promotion. Worked with Fred DiSipio in 1984 and returned to Polygram, 1985 under John Betancourt. 1994 became Executive VP under Ed Eckstein, then Danny Goldberg. After the merger with Seagram's and Universal Music Group, became Exec. VP. I'm proud to associate myself with Bon Jovi. We've shared a great many successes together.

Cyndee Maxwell – *Radio & Records* Rock Editor

10 years in Radio starting in Anchorage in 1983 at KRKN, then KWHL. In 1989 went to KGMG (KIOZ) San Diego and Los Angeles in 1991 to KLOS and KQLZ. Joined *Radio & Records* in 1993.

Bill Palmeri, VP/General Manager WPDH/WRRV/WCZX/WEOK Poughkeepsie

Program director of WPDH 1988-1995. I'm one of the few in Radio making the transition from Programming to Management - something that is usually reserved for people on the sales end. My toughest professional challenge was getting over my Bronx accent to become a broadcaster.

Lou Patrick, Strategic Media Research, VP Media Strategy

I got started in radio in 1972. College—WIVE, Springfield. I was in love with radio since I was a kid. I worked my way up from smaller markets to PD going through, Peoria, Washington DC, Philadelphia, doing Top 40 and Hot AC. 1989 went to Bolton Research. 1996 to Strategic. Had the most fun starting WMMO Orlando from scratch with Larry Rosin. We put it on the air in 1990 and it debuted #1 25-54.

Steve Raymond, PD WZXL Atlantic City, Equity Communications

I'm living the dreams in a career in broadcasting. I've obtained the PD position at WZXL and am growing and nurturing the station to even greater success, and greater awareness in the Rock radio industry.

Dave Richards, PD, WKQX Chicago, Emmis Communications

The author of this book, Tom Kelly, gave me my first job. I worked my way up through Allentown, Long Island, Providence, Boston, Seattle and Chicago. I knew what I wanted to do at 18 years old and 20 years later I'm still doing exactly what I wanted to do. Best of all, I'm running a station that I would listen to even if I didn't work here.

Ron Rodrigues, Editor in Chief, *Radio & Records*

In 1973, when I was 17, my first Radio job at radio was K101 in San Francisco as a board-op. My first full time job was as a news producer and writer in KFRC. Then to LA as MD at full service KMPC. Moved to Monterey to program KIDD. Returned to LA as OM of KNGG. Started with *R&R* in 1983 and became editor in chief in 1997.

Gene Romano, Director of Programming, Clear Channel Communications

As the PD, building WDVE, Pittsburgh to become one of the most successful Rock stations anywhere was tremendous. However, I was smart enough to realize I needed to get smarter, and decided to join Jacor in 1997 and to learn from people like Randy Michaels, Tom Owens, Marc Chase, Jack Evans and others in the company.

Larry Rosin, President, Edison Media Research

Doing research since 1980. At Princeton University, was executive producer of syndicated public affair program on 300 commercial radio stations. Got an MBA from Wharton and a job at Bolton Research. Started Edison Research in 1994. I've done several projects with Arbitron that have gotten a lot of attention. I really think we have added a lot to radio, a lot of knowledge that didn't exist.

Ed Shane, Chief Executive Officer, Shane Media Services

My company has been in business since 1977 providing management, programming and research consultation. We were one of the first to get into the "in-a-row" kind of music programming and the first to provide video training for radio people. In 1985 I correctly predicted what turned out to be a huge surge for the Country format.

Jim Smith, President, Smith and Company

WLS hired me as in 1973 as music director. Now providing full line of broadcast consulting services.

Dan Vallie, President, Vallie/Richards Consulting

Country boy who eventually consulted every major group in the industry in practically every major market. Programmed B-97 New Orleans, B-94 Pittsburgh, HOT105 Miami, EZ104 Richmond and others. VP/Programming EZ Communications for Art Keller and Alan Box. Vallie/Richards Consulting now into our third decade.

Steve Warren, President, Warren Country Consulting

I got in the business in 1964 at KOTN in Pineville, Arkansas. It was owned by Buddy Dean who was honored in 1999 at the NAB as a legend of Radio. My first program director was Buzz Bennett. I worked under Ted Turner in 1970 and '71 when he owned a couple of radio stations in Charleston and Chattanooga. I've been a programming consultant since 1981 The first several years I did AC, CHR and Country. Since 1988 I've been exclusively country as a consultant. I've also developed a music scheduling software called Music One.

Jim West, Jim West Company

I've been in the Radio business for 150 years. I've raised young giants on my knee. Many of them so successful. I'm so proud of them.

About the Author

Tom Kelly is President of Philadelphia-based Kelly Music Research, Inc., and has specialized in music listener opinion surveys for the Radio and Music Industries since 1991. Mr. Kelly is a graduate of Villanova University and began his radio broadcasting career in 1975. With experience as a disc jockey, program director, consultant and researcher, he has been an innovator in the field of music consumer research. Tom Kelly was awarded a US Patent for his "Living Room Music Test" research methodology on June 15, 1999.
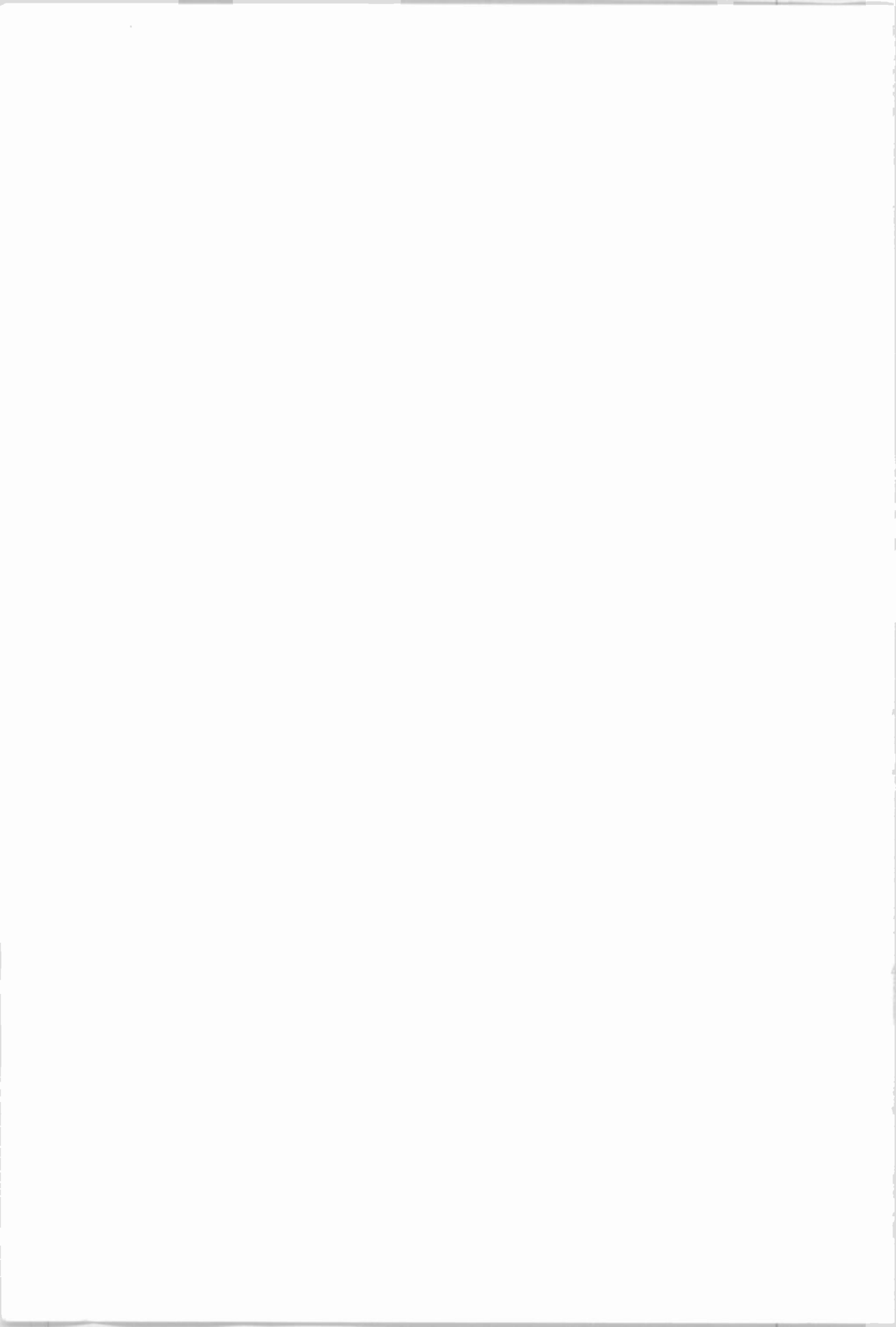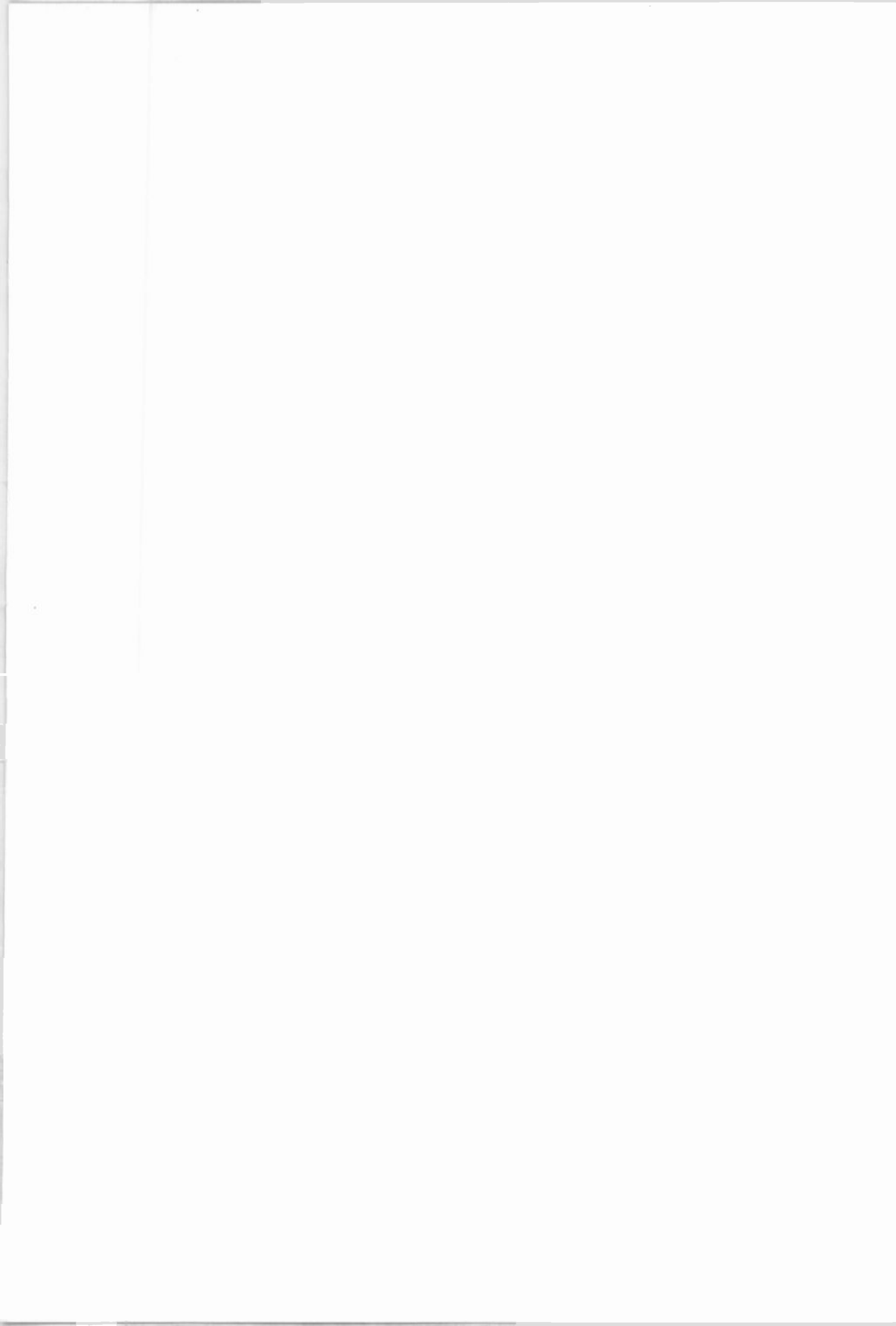
MUSIC RESEARCH: THE SILVER BULLET TO ETERNAL SUCCESS

In this new book by NAB, author Tom Kelly traces the development of music research from the early "free-form" days to today's more scientific approaches that include call-outs, auditorium testing and Kelly's own Living Room Music Test. To Kelly, the commitment to ongoing, quality research separates successful radio stations from others.

Included throughout the book are perspectives of today's leading radio pioneers who recall their own experiences and give unique insights on how to conduct quality music research. *Silver Bullet* offers an easy-to-read and straight-forward approach to answer the many how-to questions involved in radio research.

"*Silver Bullet* is not only one of the best ever history books on radio and research, but a textbook that should be in every classroom and is a must-read for every program director and general manager."
-- Dan Vallie, President, Vallie/Richards Consulting

"For those who believe in music research, there are real insights in this book. Those who do not believe will encounter revelations. The 'interview' style adds depth and authenticity to the presentation."
-- Ed Shane, Chief Executive Officer, Shane Media Services

"*Silver Bullet* is an excellent primer on radio music research techniques. It presents enough viewpoints and war stories to educate, entertain, and allow research users to ask the right questions when setting up a project. I'm thrilled to have been asked to contribute to its content!"
-- Lou Patrick, Vice President, Research & Strategy,
  Strategic Media Research

About the Author

Tom Kelly is President of Philadelphia-based Kelly Music Research, Inc., and has specialized in music listener opinion surveys for the Radio and Music industries since 1991. He is a graduate of Villanova University and began his radio broadcasting career in 1975. With experience as a disc jockey, program director, consultant and researcher, he has been an innovator in the field of music consumer research. Kelly was awarded a US Patent for his "Living Room Music Test" research methodology on June 15, 1999.

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