TECH SURVEY IV 2008 JACOBS MEDIA

Executive Summary

March 2008

Similar to last year, we are providing you with a very brief Executive Summary, followed by a more detailed report. In this way, you can quickly review this summary, but also have a useful overview of Tech Poll IV.

Here are this year's highlights, culled from more than 27,000 respondents, across 69 Rock-formatted stations in the U.S.:

- New technology continues to rapidly move into radio listeners' lives. This year, the "big gainers" in terms of occupying their time includes streaming video, iPod ownership (and podcasting), and text messaging. Almost the entire sample now owns a cell phone and has access to a hi-speed Internet connection. Never have radio audiences had so much access to so many different entertainment and information sources. The notion of "Control-Variety-Choice" that we identified in last year's "Bedroom Project" manifests itself throughout Tech Poll IV.
- In-home radio listening – as was the case in the '07 study – is diminished as respondents continue to utilize other media in their residences. (This was an alarming pattern that we saw up-close and personal in "The Bedroom Project.") In-car and at work listening, and audio streaming display positive momentum.
- In terms of overall usage, here are the media/activities that are on the upswing:

  - Reading news online (a new entry this year, and a big deal)
  - Social networking sites (continuing to grow)
  - iPods/mp3 players (getting bigger every year)
  - Podcasting (up 87% year to year)
  - Streaming radio
  - Music sites like Pandora, iTunes
  - Video games (which was trending down last year)
  - Cell phones (which continue to be huge)
  - DVDs
  - TiVo/DVRs (which leads to more television viewing)
  - Video sites like YouTube

  Slightly more positive usage:

  - FM music radio
  - Satellite radio (but few actually subscribe)
  - Cable/satellite music channels (providing CVC)

Flat-to-down usage:

- Reading a newspaper (as they migrate to news sites)
- CDs
- AM/FM talk radio

- Since this poll began in '05, we have tracked incredible gains in iPod ownership, and this year is no exception. And our studies have accurately predicted continued growth. Now, nearly six in ten respondents own one of these portable devices, an increase of 23% over last year's poll. And the iPod's presence in cars continues to rise. We are also seeing strong gains for podcasting, obviously related to the growing numbers of iPods/mp3 players that consumers routinely carry.
- Cell phone ownership continues to rise, with texting still at the top of the usage hierarchy (besides talking). Notably, the alarm feature is also a frequent cell phone utility, along with taking/sharing pictures. For many, the cell phone is their number one indispensable device.
- As an extension of the cell phone's meteoric growth, text messaging has exploded. More than half now text at least weekly, while almost one in ten texts hourly. Even six of ten Classic Rockers now text.
- The "Cell Phone Only" phenomenon continues to grow. Nearly half the 18-34s in this study do not use a landline. As we know from the past few years since Tech Poll I introduced this issue, it has implications on the ratings, and on all market research that station's conduct.
- Video streaming continues to grow quickly, and YouTube is the category killer once again.
- Social networking sites, led by MySpace, Facebook, and Classmates.com, continue their rising popularity in this year's poll. Additionally, almost one-fifth of respondents have tried an online dating service.
- The Internet continues to signal consumer growth opportunities, as nearly half shop online at least monthly.
- The benefits of on-demand and consumer control are underscored by the fact that nearly four in ten now have access to a TiVo or DVR, leading to more television viewing for a substantial percentage of these respondents.
- Nearly half say they play video games at least weekly. And music-based games like *Guitar Hero* and *Rock Band* are extremely popular – and responsible for selling a lot of music.
- While satellite radio subscribership is up a tad, there's little momentum associated with this medium as non-subscribers are not especially interested. As was the case in last year's study, Sirius appears to be doing a better job of satisfying its customers than XM.
- HD Radio awareness has ticked up, as has the number of those who own one (from .8 – 1.4% of the total sample). But this growth is glacial, even compared to the number of iPhone owners in this study (3%). A lack of knowledge and/or exposure to HD Radio continues to emerge as barriers to purchase.
- Interest and enthusiasm for new music continues to wane, even among younger respondents. FM radio continues to be the top source for new music exposure.
- Interest in the upcoming Presidential election is huge. More than 80% are planning to vote, and of the candidates in the race, Barack Obama leads the pack.

Those are some of the major findings that emerged from Tech Poll IV. For a more detailed report of the findings, read on.

Methodology & Limitations

Tech Poll IV is a follow-up survey to our three previous studies among Rock radio listeners. The survey is fielded early in the first quarter of each year.

This year's study was conducted from February 26-March 5, 2008. Data was collected from 27,029 respondents from a total of 69 Classic, Mainstream/Active, and Alternative stations in markets as diverse as Los Angeles, Philadelphia, Grand Rapids, and Greenville, South Carolina.

No single station contributed more than 2.9% of the responses to the survey. Responses were collected by an email invitation to take the survey, sent to members of each participating station's email database. All responses were collected online, and efforts were made to prevent duplicate submissions.

Web polls have inherent limitations, and this one is no exception. They are unscientific, thus margin of error calculations are not computed. Unlike a national Gallup Poll (for example) where quotas and weighting are used to ensure the sample accurately reflects the universe being measured, this web poll did not attempt to balance demographic or geographic sampling.

There are other biases that come into play, too. This includes respondents who opted to become database members, and whether the Tech Poll invitation itself was opened, read, and acted on. Thus, they may not be representative of the overall audiences that listen to these participating stations. Respondents may also be more tech savvy than the average Rock radio listener.

Despite these limitations, 27,000+ completed surveys across nearly 70 stations represent a lot of people. The results are very interesting, and in many cases, track very closely with each preceding year's study. A case in point is that the gender makeup of the 2008 poll – 59% men and 41% women – is identical to the '05, '06, and '07 studies.

Sample Demographics

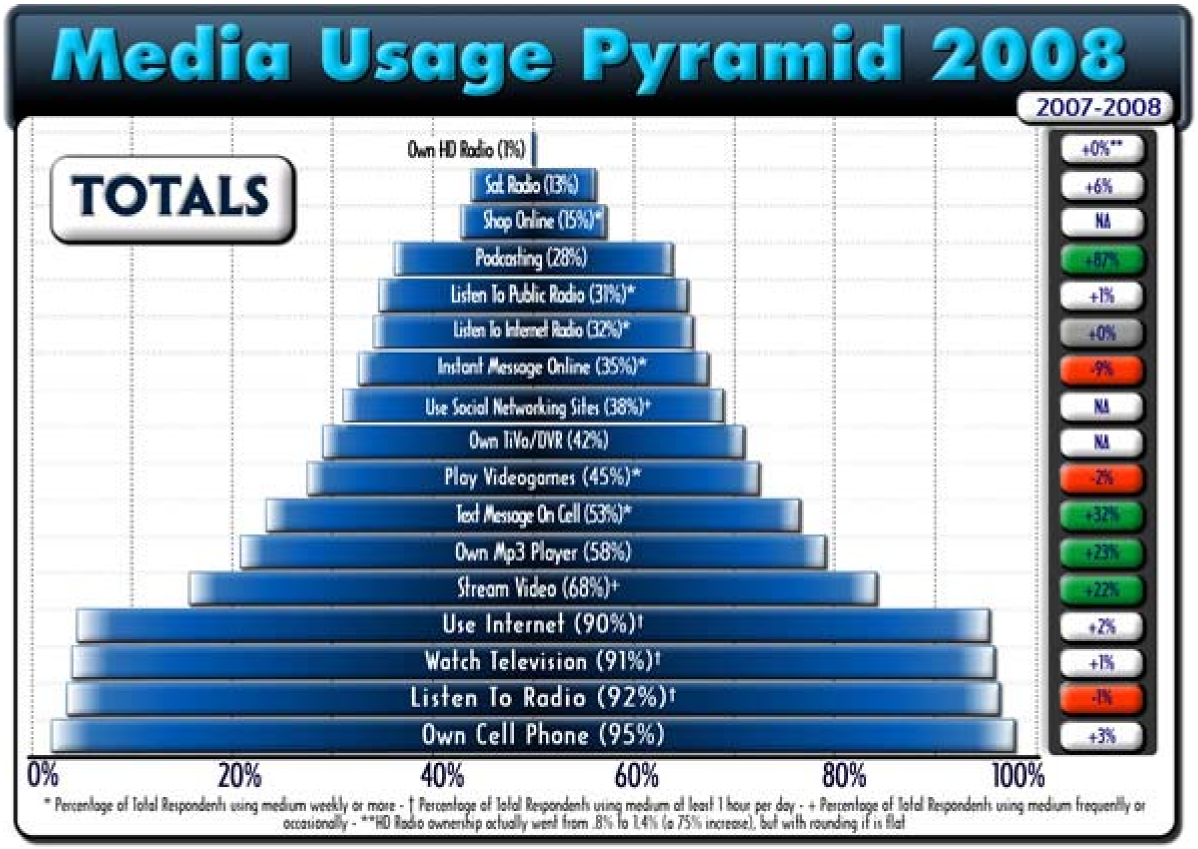
	2006	2007
Men	59%	59%
Women	41%	41%
Under 18	3%	2%
18-24	14%	11%
25-34	26%	25%
35-44	31%	29%
45-54	22%	27%
Over 55	3%	6%
Married – first time	37%	39%
Single – never married	28%	25%
Single – divorced/separated	13%	14%
Widowed	1%	1%
Remarried	13%	13%
Living with someone	7%	7%

	2006	2007
High school graduate	19%	20%
Some college	32%	32%
Tech school/community college grad	16%	17%
College degree (Bachelor's)	22%	21%
Post graduate degree	6%	6%
HH income - <$25K	11%	10%
HH income - $25-49K	28%	28%
HH income - $50-74K	36%	39%
HH income - $75-100K	15%	15%
HH income - $100K or more	11%	12%
Early adopters (new products)	10%	9%

The format breakdowns are as follows:

	2006	2007
Classic Rock	45% (N = 11,581)	44% (N = 11341)
Mainstream/Active Rock	36% (N = 9,236	37% (N = 9467)
Alternative	19% (N = 4,878)	16% (N = 4182)
AAA	NA	3% (N = 820)

Media Usage Pyramids



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We have built these visual usage hierarchies for the past three years because they are an excellent graphic device to show how radio listeners use old and new media, and how these habits are undergoing change. The pyramids are especially important in understanding the media/devices that radio listeners use, and their relative "pecking order." There are significant changes this year that are important for radio companies to understand. The column at the far right compares the change in each medium/activity/gadget to last year's levels.

Text messaging (+32%) is a phenomenon that continues to grow at a rapid pace. As we theorized last year (also supported in "The Bedroom Project"), IMing online (-9%) appears to be the loser in this one-to-one digital communication battle.

As has been the case each year of the Tech Poll, iPod/mp3 ownership continues to soar, up +23% year-to-year. It is also noteworthy that podcasting has also undergone a big rise (+87%).

The other major growth area belongs to streaming video. Not only do two-thirds of the sample visit sites like YouTube at least weekly, this activity has jumped +22% year-to-year.

This is the first year we asked about DVR/TiVo ownership, which came in very strong at 42%. And ownership of these devices has a clear impact on the amount of TV respondents watch.

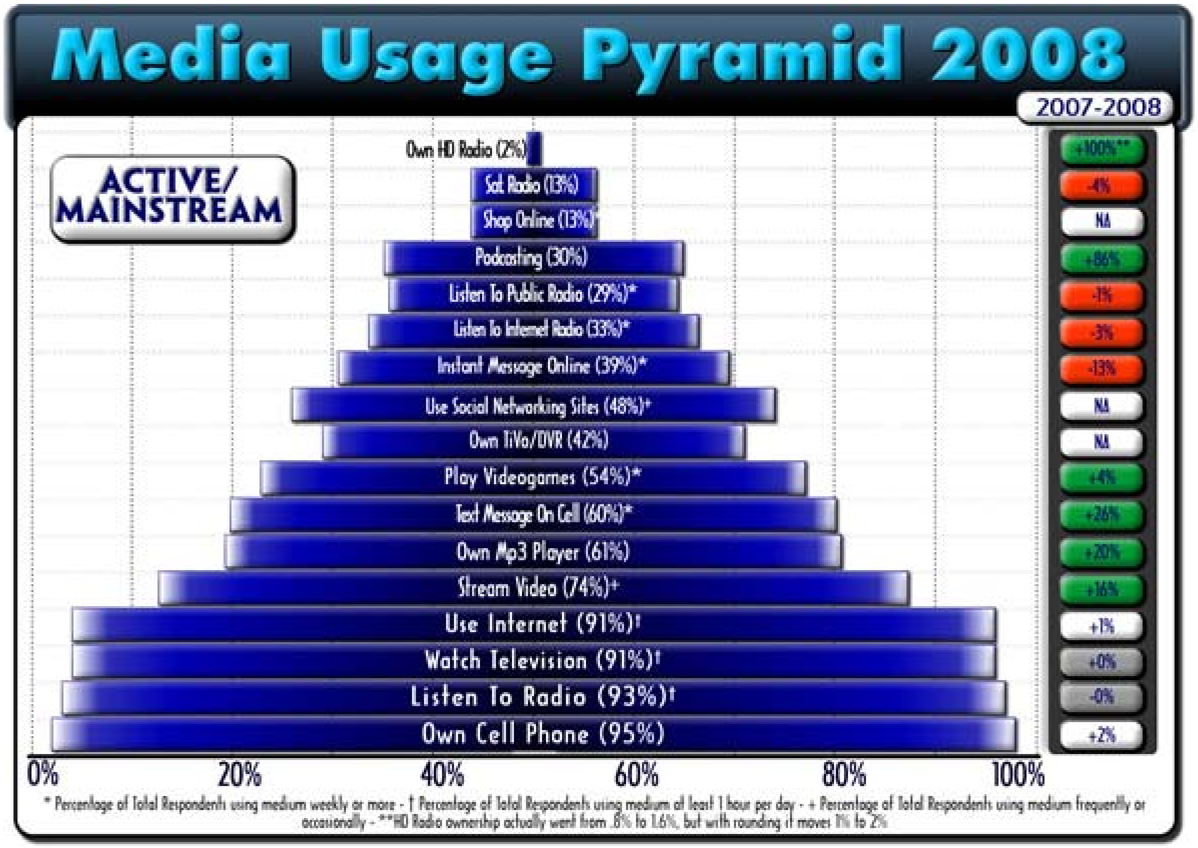
Satellite radio subscribership has moved from 12%-13% year-to-year, but is still very much in the minority – thus, its place near the top of the pyramid. And at the very top, HD Radio ownership has only moved from .8% to 1.4% in this new poll, but both years' totals have been rounded to 1%.

This is also the first year that listening to radio for 1 hour or more each day – occupying the :"base" – or most frequent activity position – has now been usurped by a different media phenomenon – ownership of a cell phone, which has hit the 95% level.

Format Pyramids

Each year, we build pyramids for the three major format groups represented in the sample, and we recommend that local stations compare their findings to the national totals for their respective formats.

Note that in reviewing each format pyramid, the overall order uses the "Totals" pyramid as the standard. In this way, you can see the usage differences between the overall sample versus format fans. As has been the case each year, Alternative listeners tend to be most media-active, while Active/Mainstream respondents are typically higher than the average. While Classic Rockers are somewhat less likely to partake in many of the media activities listed on the pyramid, their usage is still quite high, considering that most of these listeners are 40+.



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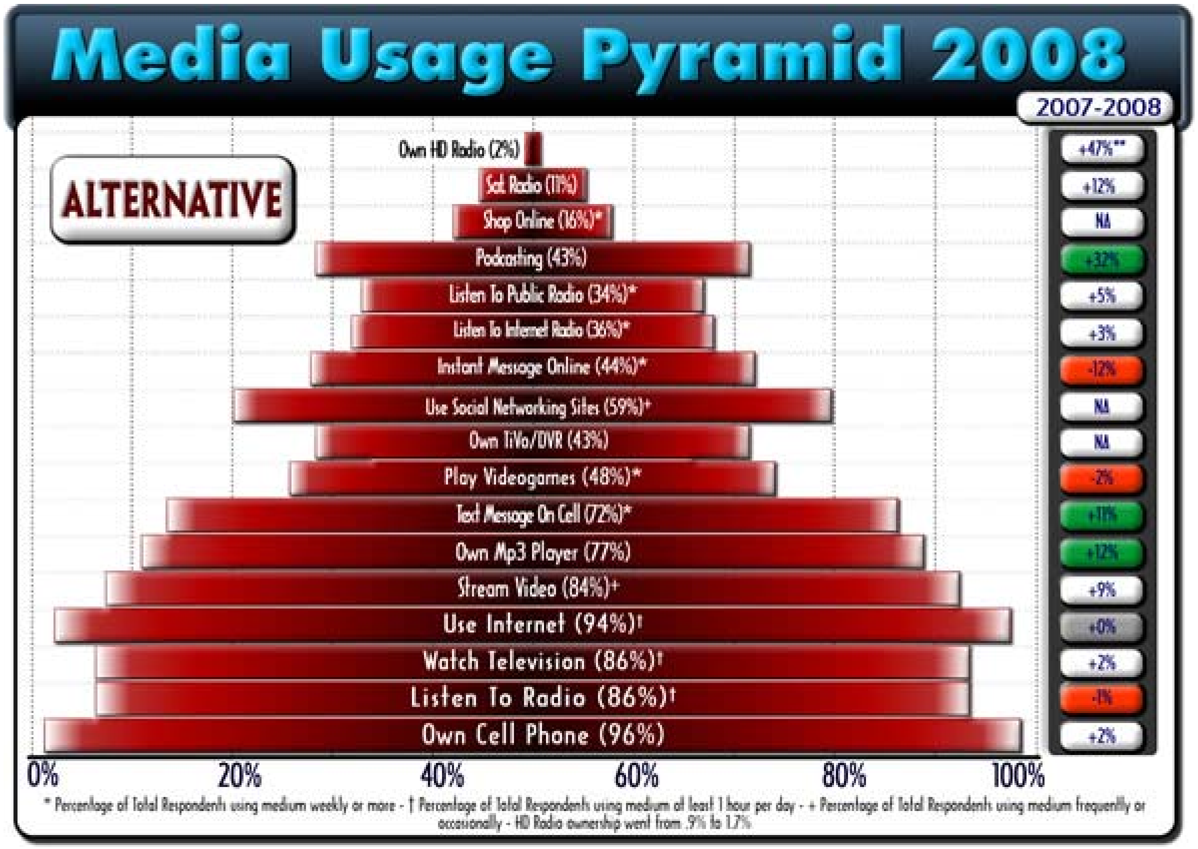

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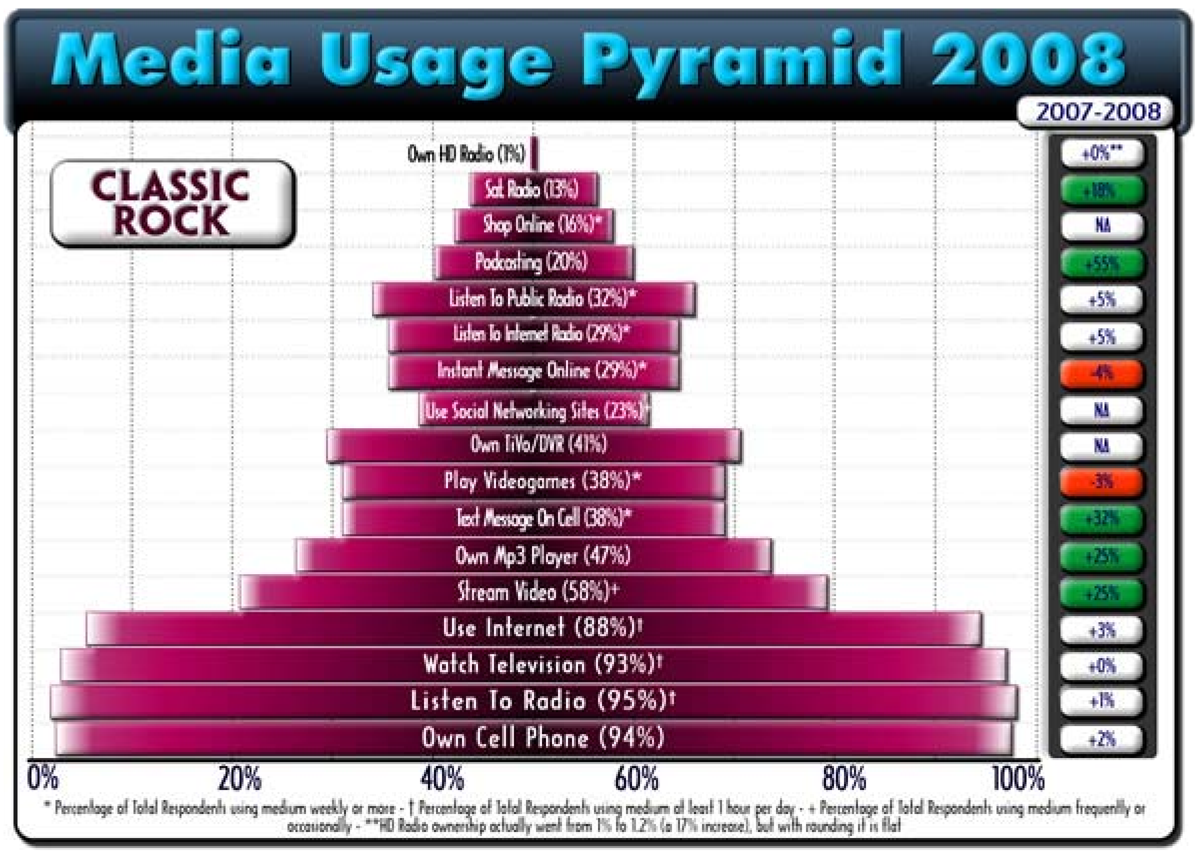

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Key Findings – Technology

In this section, we take a look at technology, in general, but also how "old media" are being impacted by technological change.

- More than one-third (35%) say they are usually the first to buy or earlier than most when it comes to buying new products. Conversely, more than four in ten (42%) describe themselves as being late or among the last to purchase new products and services. Keep that in mind as you review some of the spectacular year-to-year changes on the pyramids.

- The newspaper industry is a poster child example of how technology is changing the way that consumers are changing their information habits. While nearly one-fifth (19%) say they are reading newspapers less in the past year, more than half (54%) indicate they are reading news online a little or a lot more during this same period. This is a striking contrast, and it explains the rapid pace at which the newspaper business is attempting to change its delivery and revenue models.

- Television continues to benefit from the "Control-Variety-Choice" attribute that we developed during "The Bedroom Project" ethnographic study last year. Despite the writers' strike, heavy TV viewing has actually increased in this new study. Perhaps this uptrend has been enabled by the ownership of a TiVo/DVR. A new question this year, Tech Poll IV reveals that four in ten (42%) have one of these devices connected to a television. And of these consumers, three in ten (31%) say they are watching more TV as a result.

  As was the case in the '07 study, TV is also selected as the one device or technology that respondents say they could not live without (27%, but off a bit from last year), followed by cell phones and the Internet (both with 24%). This hierarchy, however, varies by age, gender, and format. While men and 25-54 year-olds opt for TV, women and 18-34s select their cell phones as the device they cannot live without.

- The ubiquitous Internet is actually a bit stronger in this study, bolstered by the finding that 96% say they have access to hi-speed Internet connections at home, at work, or at some other location. And nearly eight in ten (78%) have a home network setup. Clearly, this near-universal access to broadband Internet connectivity allows for more video streaming and other activities requiring speed.

- The car has always been an important center of media consumption. In the next vehicle they buy or purchase, the most important tech item (besides an AM/FM radio and CD player) is the ability to connect an iPod or mp3 player (34%). This desire, coupled with rapidly growing iPod ownership, has important implications for the radio industry. GPS is mentioned by nearly one-fifth (19%), followed by a DVD player and HD Radio (both with 13%), satellite radio (12%), and Sync (7%).

Key Findings – iPods & Podcasting

- Each year, we marvel at the growth of iPods (and similar devices), and Tech Poll IV is no exception. Overall, nearly six in ten (58%) now own one, an impressive increase of 23% from the '07 study. Once again, the majority (59%) are made by Apple. Amazingly, more than three-fourths (77%) of Alternative listeners own one of these devices, and they are especially likely to have an Apple product.

- And it's not over yet. Of those who don't own one of these devices, one in ten (10%) says it's very likely they'll purchase one this year, while about one-third (32%) say it's somewhat likely they'll take the plunge. We once again expect to see even more iPod growth in Tech Poll V next year.

- Similar to past studies, iPods impact radio listening. About one-fourth of those who own one say they listen to it exclusively or mostly for music (25%), especially Alternative fans and 18-34 year-olds. As the traditional Walkman verges on extinction, and the iPod becomes more universal, radio's portability continues to be challenged.

- iPods are everywhere. While a majority use them while working out (61%), about one-third listen to these devices while at-work, at home, and in the car. This last location has implications for radio, considering that more than half (53%) of iPod/mp3 owners say they have a means to connect these devices in their vehicles. And as noted earlier, an iPod connection is one of the most desirable features on the next car or truck they purchase.

- Similar to last year's poll, the most requested feature on future iPod/mp3 players is an FM radio tuner (34%), followed by more capacity for songs/videos (23%). Notably, Apple owners (44%) are especially desirous of being able to access FM radio on their next device.

- Three in ten (28%) respondents (whether they own an iPod or not) say they've downloaded/listened to a podcast (37% among iPod owners, and 45% among Apple-branded player owners), especially Alternative fans. And of these respondents, two-thirds (69%) say they'd be very or somewhat willing to access a podcast at no charge that contains an introductory commercial from a sponsor. Once again, this signals a revenue opportunity for stations that feature popular podcasts.

Key Findings – Internet Radio/Streaming

- Respondents continue to report listening to more Internet radio since the inception of this poll. In '05, half (50%) fell into this category; in this new study, six in ten (59%) now say they stream. Overall, nearly one-third (32%) listen to Internet radio on at least a weekly basis. Clearly, the rise in hi-speed Internet connectivity has contributed to this steady increase. Nearly all (96%) of these respondents indicate they have regular access to a high-speed internet connection.

- As was the case last year, streaming leadership belongs to "the station that sent me this survey" (49%, up from 44% in '07). Additional streaming sources include other local stations (45%), indicating that while listeners can access any stream from around the globe, their inclination is to access a hometown source. This is an important finding because it illustrates the importance of marketing and promoting a station's stream, especially before the Internet becomes commonplace in cars. Other streaming sources include radio stations from other countries (24%), Y! Music (16%), iTunes and Pandora (both with 12%, and on the rise).

- The good news for radio is that more and more stations in this survey are streaming. Overall, eight in ten (80%) now provide this service. And it translates into more listening. As a result of the stream, an impressive majority (55%) say they now listen to these stations a little more or a lot more. This is yet another strong indication that when radio provides additional access point on the Internet, it begets more listening.

Key Findings – Cell Phones

- First and foremost, cell phone ownership has now hit the 95% mark in Tech Poll IV. And as noted earlier, many respondents now report that it is their indispensable device.

- We continue to see multi-various cell phone uses, beyond talking. Texting (70%) continues to be the top activity, followed by taking/sharing pictures (56%), and the alarm feature (55%). (Something to consider is the future of the clock radio, if more consumers continue to use this alarm function in their phones.) Other key cell phones features mentioned by more than 25% include the calculator, address book, downloading ringtones, and games. In almost all cases, Alternative fans tend to be more apt to utilize many of these features. It is also noteworthy that women have a greater propensity to text, download ringtones, and take/share pictures than men.

- On at least a daily basis, 44% now use text messaging (up from 32% last year). This represents astonishing growth for texting as a key communications tool, especially among 18-34s. Not surprisingly, more than six in ten (63%) Alternative fans text at least every day, but so do three in ten (30%) Classic Rockers. And to punctuate the strong habit that some texters develop, one-fifth (21%) of 18-29 year-olds say they text on an *hourly* basis. Interestingly, about one in ten texters (11%) say they regularly or occasionally exceed their texting plans.

- As for communicating via text with radio, there are some changes in this year's survey that are of importance. About one-fifth (19%) say they'd rather text *to* the station in order to vote, play a contest, or access title/artist information. But only 8% opt to receive texts *from* the station, down from 17% in '07. While four in ten (42%) say that either model is appealing, there clearly seems to be some movement away from receiving texts from the station among many of these respondents.

- Notably, daily instant messaging has been steadily dropping as texting has become more popular. Overall, one-fourth (25%) IM at least daily, compared to more than one-third (35%) in the '07 study.
- The "Cell Phone Only" issue – originally identified in the first Jacobs Media Tech Poll in 2005 – continues to remain problematic, particularly for Alternative stations. In this new study, 27% now fall into this "Cell Phone Only" category – up from 23% last year, and 17% back in the '05 study. As has been the case, Alternative fans and younger consumers are the most prevalent CPO types. Similar to last year, more than four in ten (42%) only have cell phones, as do more than half (54%) of 18-29 year-olds.
- And finally, 3% of the entire sample now owns an Apple iPhone. Men, 18-34s, and our "early adopters" are the most likely purchasers. It is interesting to note that unlike the iPod, projected purchases of iPhones appear to be soft. Of those who don't own one now, only 2% say they're very likely to purchase an iPhone this year, while only one in ten (9%) is somewhat likely. This might explain the recent push to open the iPhone to software developers, along with Apple's new initiative to encourage businesses to consider these devices.

Key Findings – Streaming Video

- Video streaming has become a major Internet activity among respondents. Overall, two-thirds (68%) say they frequently or occasionally download/stream video from sites like YouTube. The most frequent video streamers are Alternative listeners and 18-34s, but even one-in-ten Classic Rock fans (12%) watches streaming video often.
- If it's even possible, YouTube has extended its already dominant lead over all other video outlets, but network TV sites are coming on strong. Overall, eight in ten (79%) video streamies visit YouTube at least weekly, followed by TV network sites (32%). Other frequently mentioned Internet video sources include MySpace (33%), Yahoo! Video and Google videos (both with 20%). Google, after its purchase of YouTube, has experienced an understandable drop year-to-year.

Key Findings – Social Networking

- More than half of Tech Poll IV respondents now regularly visit social networking sites (53%). MySpace holds onto its '07 lead (with 39%), but Facebook has scored impressive growth (16% up from 8% in '07). Classmates.com earns regular visits from one in ten (10%).
- Overall, six in ten (63%) social networking site users have a MySpace profile, followed by Facebook (29%). Daily visits to all social networking sites are most prevalent among women and Alternative fans. But many listeners visit these popular sites on a regular basis.
- Notably, three in ten of those who use these sites (28%) say they have met someone in person as a result of these social networking connectors. Alternative fans and 18-34 year-olds are most apt to have personally met someone they first encountered on these sites.
- Dating websites are also utilized by nearly one-fifth (18%) of all respondents. Of these, Match.com (9%) is mentioned most often, followed by Yahoo! Personals (8%), eHarmony.com (5%), and FriendFinder.com (3%).
- But as a basic way to connect with friends for weekend plans, there's no substitute for a personal phone call. Overall, three-fourths say they'd set up their social plans with a phone call (75%), while 12% would send an email, and 11% would use text messaging. Not surprisingly, however, Alternative partisans and 18-34s are twice as likely to send a text.

Key Findings – Gaming

- Nearly half (45%) say they play video games at least once a week, especially 18-34 year-olds and men. But gaming shows popularity with women and older listeners, too.
- A big change is in ownership of video game systems. In '07, 35% of respondents did not own one, compared to only 20% in this year's survey. Sony's PS2 remains the leader (45%), followed by the Wii (18% - up from 4% last year).
- The stereotype of the typical gamer playing by himself is challenged by Tech Poll IV. For many, video games are a social activity. While the majority (53%) say they usually play solo, one-third (32%) play games with friends in person, while one in ten (11%) plays online with others. Alternative fans and women are more apt to play with friends in person, while men and those 50+ tend to play by themselves.
- Games like *Guitar Hero* and *Rock Band* have made a huge impact in this survey. Nearly half (46%) have played one or the other (or both) in the past year (including more than one-third of Classic Rockers). Significantly, these games have dual-gender appeal, and they sell music. Of those who have played them, three in ten (31%) say they've purchased a song they heard featured on these games.
- In a different type of game, nearly one-fourth (23%) say they've participated in a fantasy league during the past year. Participation is solid across the formats, genders, and age groups, lending credence to their broad-based popularity.

Key Findings – Radio & New Music

- Overall, 92% of the entire sample listen to local radio stations at least one hour a day (down 1% from last year).
- "The Bedroom Project" indicated that among young people in particular, radio was being challenged in a number of listening locations. In this larger study, radio has lost some ground on the home front. Additionally, 40% say they never listen to the radio while walking/working out (remember those iPod numbers), and many say they have not listened to a radio on their person as much during the past year. Additionally, at-work listening has also shown some erosion. While nearly one-fourth (23%) say they never listen to radio on the job, an additional 16% say they're listening a little/a lot less at work. While three in ten (28%) report more listening in the workplace, that figure is down from the '07 survey (31%).
- An important data point that relates to at-work listening, and the changing tech environment deals with Internet radio. Among "streamies" (those who listen to streaming audio), at-work listening to AM/FM stations surpasses the averages. Overall, nearly four in ten (37%) of these Internet radio listeners indicate they're listening a little/a lot more in the workplace. Clearly, the streaming component is an important cog in radio's quest to remain popular and viable in all-important work settings.
- Overall, about one-fourth (24%) say they're listening a little/a lot more to FM music radio in the past year, compared to 17% who say a little/a lot less. Alternative fans and those under 30 are the most apt to have cut back on their FM music radio listening.
- Perceptually, there's a split decision as to whether commercial radio has improved in the last year. While one-fourth (25%) say it's better, a similarly sized group (24%) say it's gone downhill. Not surprisingly, Alternative partisans and satellite radio subscribers are most critical.
- The fortunes for new music are not nearly as positive. Each year, the percentage of those who believe that new music has improved has eroded. This year, only one-fifth (19%) say it's gotten better, compared to three in ten (30%) who claim it's gotten worse. There's a negative skew across the various age groups, as well as among both males and females. Even among Alternative fans – a format that has always been new music-oriented – "worse" outnumbers "better" by a 27%-25% margin.
- As *the* source for exposure to new music, radio has hung onto its edge. Overall, more than half (55%) continue to name radio as their prime destination for new releases, followed by friends/other people (11%), "my kids" (5%), and music television channels like MTV (4%). Sites like Pandora, iTunes, satellite radio, and music magazines are all mentioned by 3% of respondents.
- But radio may be losing its position as an information source about new music to the Internet. In a new question,

we offered a hypothetical question that asked, "If you hear a new band or song you like on the radio, which of the following are you most likely to do?" Allowing for multiple responses, the most popular action is to do a Google/Yahoo! search for the artist's website (21%). Overall, 17% say they'd probably purchase the CD from a local store like Best Buy or Wal-Mart, followed by visiting the radio station's site for more information (16%). About one in ten says they'd buy the song on iTunes (or a similar site) or look up the artist/song on MySpace.

Key Findings – Satellite Radio

- Satellite radio subscribership has moved from 12%-13% year-to-year, with equal strength for XM and Sirius. But there are indications of lessening momentum. Since the '06 poll, fewer non-subscribers are showing interest in either service. Overall, only 5% say they're likely to purchase either Sirius or XM in '08. And the proposed merger appears to have little impact in this decision, as only an additional 3% indicate that it would motivate subscribership. For the other 92% who are non-subscribers, there is little to no likelihood they'll pay for either service. Part of the challenge facing both XM and Sirius relates to the motivation to subscribe in the first place. Among those who have purchased either or both services, only four in ten (41%) made that choice themselves. About one-third (32%) of subscribers say that it came with the vehicle they bought/leased, while one-fifth (20%) report that satellite radio was a gift.

- How one became a subscriber has a relationship on continuing to stay with satellite radio. For those who made the choice themselves, about two-thirds (66%) indicate they will definitely continue. But, among those who are now using XM and Sirius simply because came with a new car acquisition, only four in ten (40%) say they absolutely plan to stay with satellite radio.

- Overall, just over half (56%) of subscribers say they absolutely will continue the service. An additional one-fourth (28%) report they probably will remain subscribers, while 16% either aren't sure about their future with satellite radio, or they're pretty or absolutely sure they'll discontinue. With only a 56% absolute retention rate, XM and Sirius could be facing tough times ahead, merger or not.

- About three fourths of subscribers (76%) are satisfied with satellite radio, while only 5% aren't.

- As was the case in '06, Sirius subscribers tend to be more satisfied than those who have XM. What are satellite radio's negatives? While three in ten (31%) subscribers have no issues, complaints are more prevalent for those who ended up with the service as features in their vehicles or if they received it as a gift. The top complaint revolves around too many channels that are of no interest, followed closely by commercials on some of the channels. Those who got satellite radio because it came with the car also have a greater likelihood to complain about the price of the service.

Key Findings – HD Radio

- While there's been considerable upward movement with various gadgets and technologies during the past year, growth has been slow for HD Radio. Moving from .8% in the '07 study to 1.4% this year, consumers are still very wary about purchasing an HD Radio. Overall, 4% of self-described "early adopters" have discovered this new radio technology.

- Familiarity with HD Radio continues to inch ahead. This year, nearly half (48%) say they know about it – up from 45% in '07. Men, Alternative partisans, and younger listeners report more awareness of HD Radio.

- In the past two years, we "tested" the knowledge levels of those familiar with HD Radio, to ensure their accuracy using "True/False" questions. Overall, they tend to correct about various aspects of this technology 64% of the time.

- After providing a brief description about HD Radio, and inquiring about a $100-$200 price point, one in ten (11%) reports they would be very likely to purchase a radio, while one-third (32%) indicate they'd be somewhat likely. Men, heavier radio listeners, and "early adopters" tend to be most positive about the prospects of purchasing an HD Radio.

- Nearly identical to last year's poll, the key perceived selling point of HD Radio is no subscription fees (30%), followed by digital quality (25%), less/no commercials (20%), new stations (13%), and more variety (11%).
- The barriers to purchasing an HD Radio are also consistent with the '07 survey. Four in ten say (40%) they simply don't know enough about it. Additionally, one-third (32%) complain that the radios are too pricey. But two other impediments have to do with a lack of exposure to HD Radio. Nearly three in ten (28%) say they've never heard HD Radio, while one-fifth (22%) say they don't know anyone who owns one.

Key Findings – The Election

Because it's an election year, we included political questions for this first time in this survey.

- Respondents are very engaged about the Presidential election, as evidenced by the fact that 84% say they intend to vote in November. While the 50+ group is especially likely to say they're planning on going to the polls this fall, interest is consistently strong across all the sub-groupings.
- Overall, three in ten (30%) identify themselves as Democrats, while nearly one-fourth call themselves Republicans (22%). Interestingly, one-fifth classify their political affiliation as Independent (21%), but more than one-fourth either choose another party or opt not to respond. Women and Alternative fans lean Democratic, while men and Classic Rockers skew Republican.
- Regardless of party match-ups, respondents were simply asked about their top choice for President "if the election were held today" (late February/early March). Looking at their choices among likely voters, Barack Obama comes out on top (26%), followed by John McCain (22%), and Hillary Clinton (18%). Mike Huckabee and Ron Paul each garner less than 6% of this vote, while Ralph Nader captures 1%.

  Similar to the various polls that have been taken over the last several months, Obama's appeal is strongest among younger respondents. Four in ten (42%) Alternative fans support him. McCain's strength leans male, 40+, and among Classic Rockers. Clinton does best among women (26%) and the 50+ crowd.

Key Findings – Miscellaneous

Here are some odds and ends findings from Tech Poll IV:

- Alternative fans are most likely to have graduated from college. Overall, four in ten (41%) have a four-year or graduate degree. By a wide margin, Alternative listeners are far more educated than partisans of either Active/Mainstream or Classic Rock.
- Classic Rockers are most likely to be married. Six in ten (63%) are married for the first time or have remarried. Conversely, Alternative partisans are the most apt to be single (54%).
- While Active and Classic Rock fans skew heavily male in this survey, the Alternative tally is nearly evenly split male/female.
- National Public Radio's impact on Rock listeners is significant. As has been the case during all four Tech Polls, three in ten (31%) listen to public radio at least weekly. Listenership is generally consistent across the various subgroups, but will vary by market. This data point is worth checking in the local market breakouts.
- Online shopping is a major activity. This is the first time we asked the question, and we found that nearly half (46%) shop via the Internet at least monthly; 15% do so at least weekly. The most frequent shoppers are 50+ listeners. And notably, men shop online more than women, a possible indicator that guys prefer the convenience and speed of the computer, while women lean toward the actual shopping experience, with all of its social implications.
- The email club concept is rock-solid, continuing to nurture loyalty and connectivity with listeners. Overall, six of

every ten (59%) say it creates a stronger bond with the station. These numbers are consistent across-the-board, and also very similar to past years' polls.

- Music television channels are part of the tech/entertainment diet, but Vh1 has passed MTV as the most watched of these channels – even among Alternative and 18-34 year-olds as well as those under 18. Women watch MTV and Vh1 more than men. Among the total sample, three in ten (28%) view VH1 at least weekly (especially women), followed by MTV (21%), Vh1 Classic (14% - with more support from men and Classic Rockers), and CMT (13%).

We hope you take the time to study the findings, as well as some of the breakouts that we've provided. We thank you once again for your participation, and we look forward to Tech Poll V in early '09.