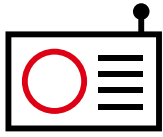


RADIO – AUDIO WITH STYLE

A PROFILE OF METROPOLITAN COMMERCIAL
RADIO LISTENERS AND THEIR FASHION/CLOTHING
PURCHASING

FEBRUARY 2018



RADIO ON THE RUNWAY

Are you 'Fashion Forward' or a 'Fashion Idler'? Almost four-in-10 commercial radio listeners consider themselves ahead of the game when it comes to fashion and clothing.

Fashion Forward consumers are more likely to be female, more likely to be in a white collar occupation and have a higher than average household income.

Nielsen Consumer & Media View (CMV) research reveals that for this trendy group of consumers, being fashion conscious is not necessarily about the clothes, it's about the image and status they wish to convey. It's a statement on the individual; and they actively set out to improve their image, get noticed and stand out from the crowd.

Fashion Forward consumers bring big opportunities to advertisers as their interests extend beyond clothes and into skincare, tanning products and cosmetics. Remember, it's all about the image!

They're influencers and are more likely to give advice on a wide range of products and services. However, they are also information-hungry, seeking advice on the same topics themselves.

As a group, Fashion Forward consumers are primed to purchase and commercial radio is perfectly positioned to connect with them. They're engaged with radio, trust their favourite radio station and talk about what they hear on radio. Radio programs in the breakfast, morning and afternoon slots are the best times to reach these consumers.

This overview of fashionable consumers has been constructed with commercial radio listeners in mind and designed to interpret their preferences, perceptions and intentions. Any reference to Australia or Australians in this report means consumers across the five major capital cities in Australia who have listened to commercial radio in the past week. Unless otherwise specified, audience and population are people aged 14 years and older.



COMMERCIAL RADIO LISTENERS

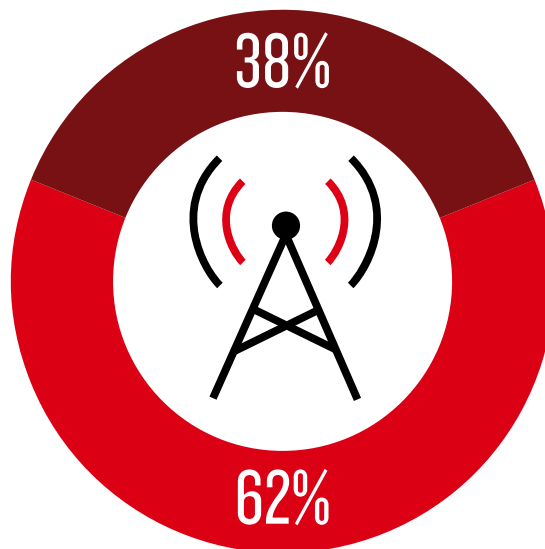
In this report, the commercial radio audience has been grouped into two mutually exclusive groups based on their propensity to purchase clothing/fashion: early adopters and those who prefer to wait and see before buying.

COMMERCIAL RADIO LISTENERS – CLOTHING/FASHION ADOPTION PROFILES



FASHION FORWARD

3,675,000 OR 38% OF COMMERCIAL RADIO LISTENERS 14+



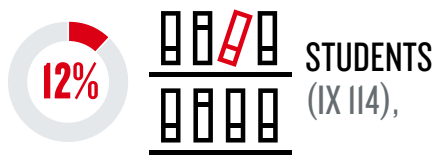
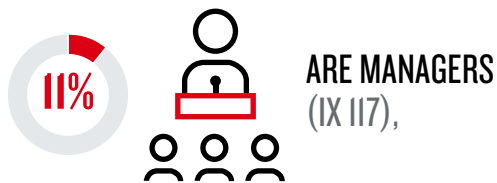
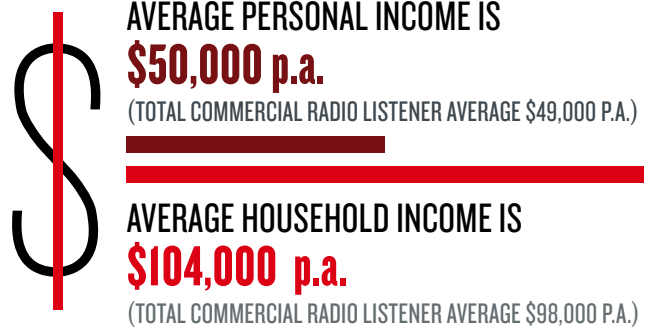
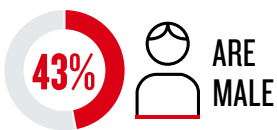
FASHION IDLERS

6,148,000 OR 62% OF COMMERCIAL RADIO LISTENERS 14+

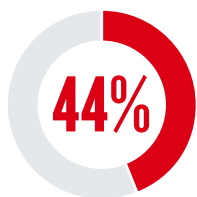
FASHION FORWARD –

3,675,000 COMMERCIAL RADIO LISTENERS 14+

“ALWAYS THE FIRST TO TRY OR USUALLY TRY THINGS QUITE SOON AFTER THEY ARE AVAILABLE” (CLOTHING)



ARE SINGLE/NEVER MARRIED (IX 112)



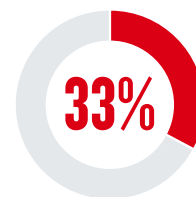
LIVE IN HOUSEHOLDS OF FOUR OR MORE PEOPLE



ARE YOUNG FAMILIES (AT LEAST ONE CHILD UNDER 12)



SPEAK A LANGUAGE OTHER THAN ENGLISH AT HOME (IX 126)



RENT THE CURRENT HOME THEY LIVE IN (IX 106)

COMPARED TO THE FASHION IDLER GROUP, THIS SEGMENT:

HAS THE HEAVIEST REPRESENTATION OF FEMALES AGED 18-24

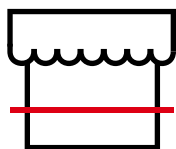
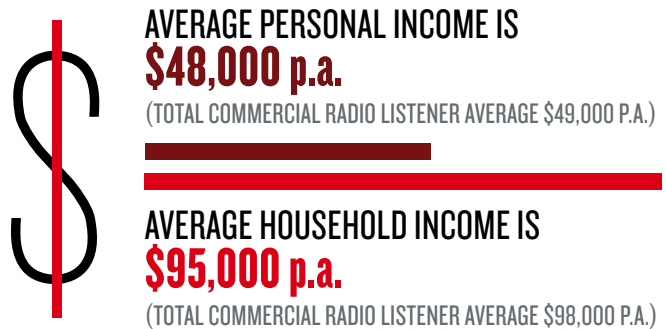
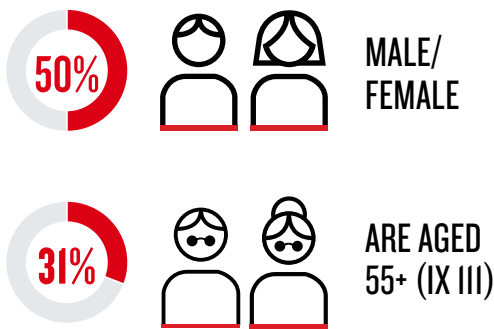
HAS THE HIGHEST AVERAGE PERSONAL AND HOUSEHOLD INCOME

HAS A CONSIDERABLY HIGHER PERCENTAGE OF THOSE WHO SPEAK A LANGUAGE OTHER THAN ENGLISH AT HOME

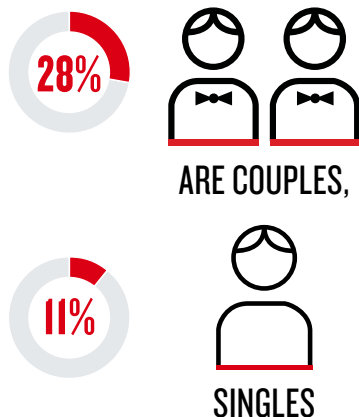
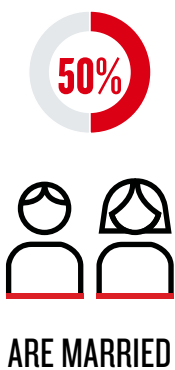
[Base: Commercial Radio Listeners aged 14+]
[ix = indexed against total metro population aged 14+]
Question build: Almost always first to try or usually try things quite soon after they are available (Clothes)

FASHION IDLERS –
6,148,000 COMMERCIAL RADIO LISTENERS 14+

“PREFER TO WAIT AND SEE BEFORE TRYING OR USUALLY THE LAST TO TRY OUT NEW THINGS” (CLOTHING)



**MORE LIKELY TO BE RETIRED,
HOME DUTIES, TRADES, LABOURERS**



COMPARED TO THE FASHION FORWARD GROUP, THIS SEGMENT:

HAS THE HEAVIEST REPRESENTATION OF MALES 55+

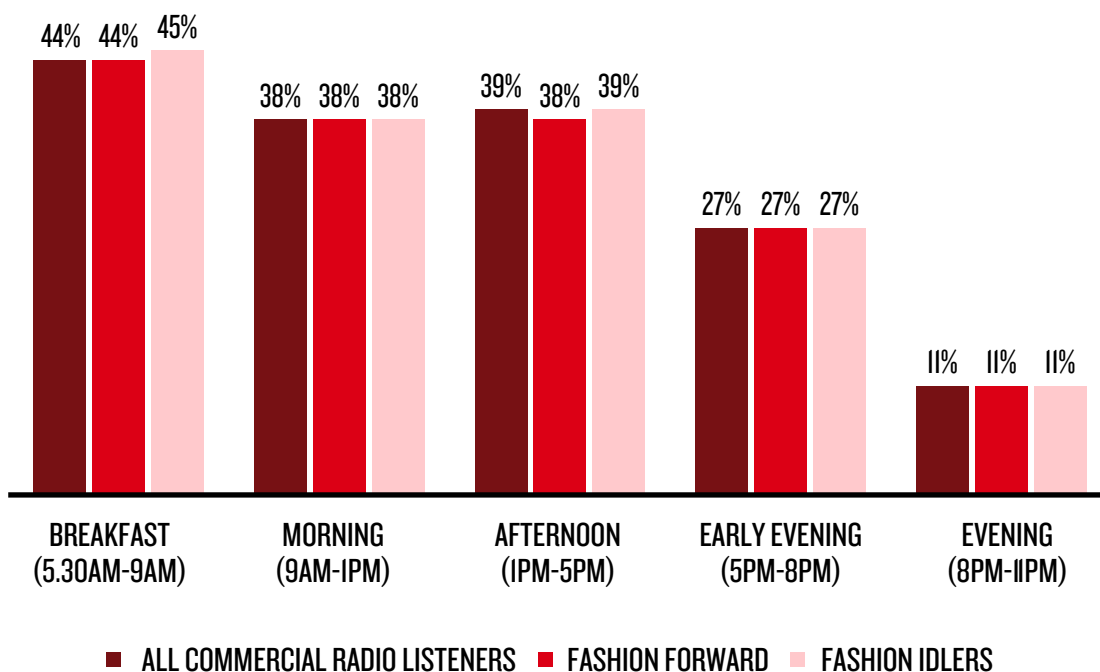
HAS THE HIGHEST REPRESENTATION OF RETIREES

[Base: Commercial Radio Listeners aged 14+]
 [ix = indexed against metro population aged 14+]
 Question build: Prefer to wait and see before trying or usually the last to try out new things (clothing)



CONNECTING WITH CONSUMERS ON COMMERCIAL RADIO

The daylight hours are the best time period to connect with these audience segments on commercial radio, with breakfast, morning, afternoon and drive sessions equally strong.



	WEEKDAY RADIO LISTENERS	ALL COMMERCIAL RADIO LISTENERS	FASHION FORWARD	FASHION IDLERS
☀	Breakfast (5.30am-9am)	44%	44%	45%
☀	Morning (9am-1pm)	38%	38%	38%
☀	Afternoon (1pm-5pm)	39%	38%	39%
☀	Early Evening (5pm-8pm)	27%	27%	27%
☀	Evening (8pm-11pm)	11%	11%	11%

[% of column group]
[Base: Commercial Radio Listeners 14+]



TUNING INTO FASHION CONSUMERS ON COMMERCIAL RADIO

The following points should be taken into consideration when communicating with these audience segments:

Fashion Forward: Generally more engaged with radio than Fashion Idlers. They're more likely to trust their favourite radio station, find radio ads entertaining and talk about what they hear on the radio.

Fashion Idlers: Generally less engaged with radio compared to the Fashion Forward group.

AGREE OR STRONGLY AGREE WITH THE FOLLOWING STATEMENTS	ALL COMMERCIAL RADIO LISTENERS	FASHION FORWARD	FASHION IDLERS
I prefer radio stations with more music and less talk	49%	51%	48
I listen to radio for info/news on what happens in my city	41%	42%	41%
I love listening to the radio to relax	41%	44%	39%
I always listen to the radio on the way to work	41%	43%	39%
I only listen to the radio for music	39%	43%	37%
Listening to the radio elevates my mood	37%	41%	35%
I like to hear radio content/programs that educate and inform	35%	36%	34%
Listening to the radio is an essential part of my day	35%	37%	33%
I often talk about what I hear on radio	33%	38%	30%
I trust my favourite radio station to inform me about products and services	22%	28%	19%

AGREE OR STRONGLY AGREE WITH THE FOLLOWING STATEMENTS	ALL COMMERCIAL RADIO LISTENERS	FASHION FORWARD	FASHION IDLERS
I like radio ads that feel like the station I'm listening to	22%	26%	20%
I find radio ads creative and entertaining	19%	23%	17%
I trust radio ads read by/featuring radio personalities	14%	18%	12%
Grocery ads on the radio influence my grocery shopping	14%	19%	11%

[% of column group]
 [Base: Commercial Radio Listeners 14+]





RADIO LISTENERS' VIEWS ON IMAGE AND PURCHASING

FASHION FORWARD:

- They are style and appearance-driven
- Believe designer labels improve image
- Like to wear things that will differentiate them from the crowd
- Prefer to research in-store before purchasing the item online
- More likely to be concerned about the length of delivery times for items purchased online

FASHION IDLERS

- Design labels are not important and they are also less likely to care about looking stylish at all times
- Two-in-three compare prices online before buying
- Prefer to research online then buy in-store
- Less concerned about online delivery times than the Fashion Forward group

AGREE OR STRONGLY AGREE WITH THE FOLLOWING STATEMENTS	ALL COMMERCIAL RADIO LISTENERS	FASHION FORWARD	FASHION IDLERS
I try to look stylish at all times	32%	48%	24%
I take care in my appearance at all times	48%	59%	41%
I try to keep up with the latest fashions	22%	37%	13%
Designer labels help to improve one's image	18%	26%	13%
I like to wear clothes that are noticed by others	24%	37%	17%
I really like to have a tan	23%	30%	19%
I am interested in anti-ageing benefits in skincare	34%	43%	29%
I prefer organic skincare/beauty products	32%	40%	27%

[% of column group]
 [Base: Commercial Radio Listeners 14+]

AGREE OR STRONGLY AGREE WITH THE FOLLOWING STATEMENTS	ALL COMMERCIAL RADIO LISTENERS	FASHION FORWARD	FASHION IDLERS
Reluctant to shop online because I don't like to share credit card info	24%	27%	23%
I often use the Internet to help plan my shopping	46%	50%	43%
I compare prices online before purchasing	60%	63%	59%
I'm concerned about delivery time/issue from items purchased online	33%	37%	31%
I'm concerned about conversion of item I buy online to Australian dollars	32%	35%	30%
I prefer to research items by visiting a store and then buying online	29%	36%	25%
I prefer to do research online for item and then buy in-store	44%	47%	42%
Pay extra for products consistent with the image I want to convey	32%	42%	26%

[% of column group]
 [Base: Commercial Radio Listeners 14+]



WHAT DOES THEIR SHOPPING BEHAVIOUR LOOK LIKE?

Around a quarter of both Fashion Forward and Fashion Idler consumers spend \$101-\$200 per week in shopping centres. Fashion Forward consumers, however, spend the most on entertainment per week.

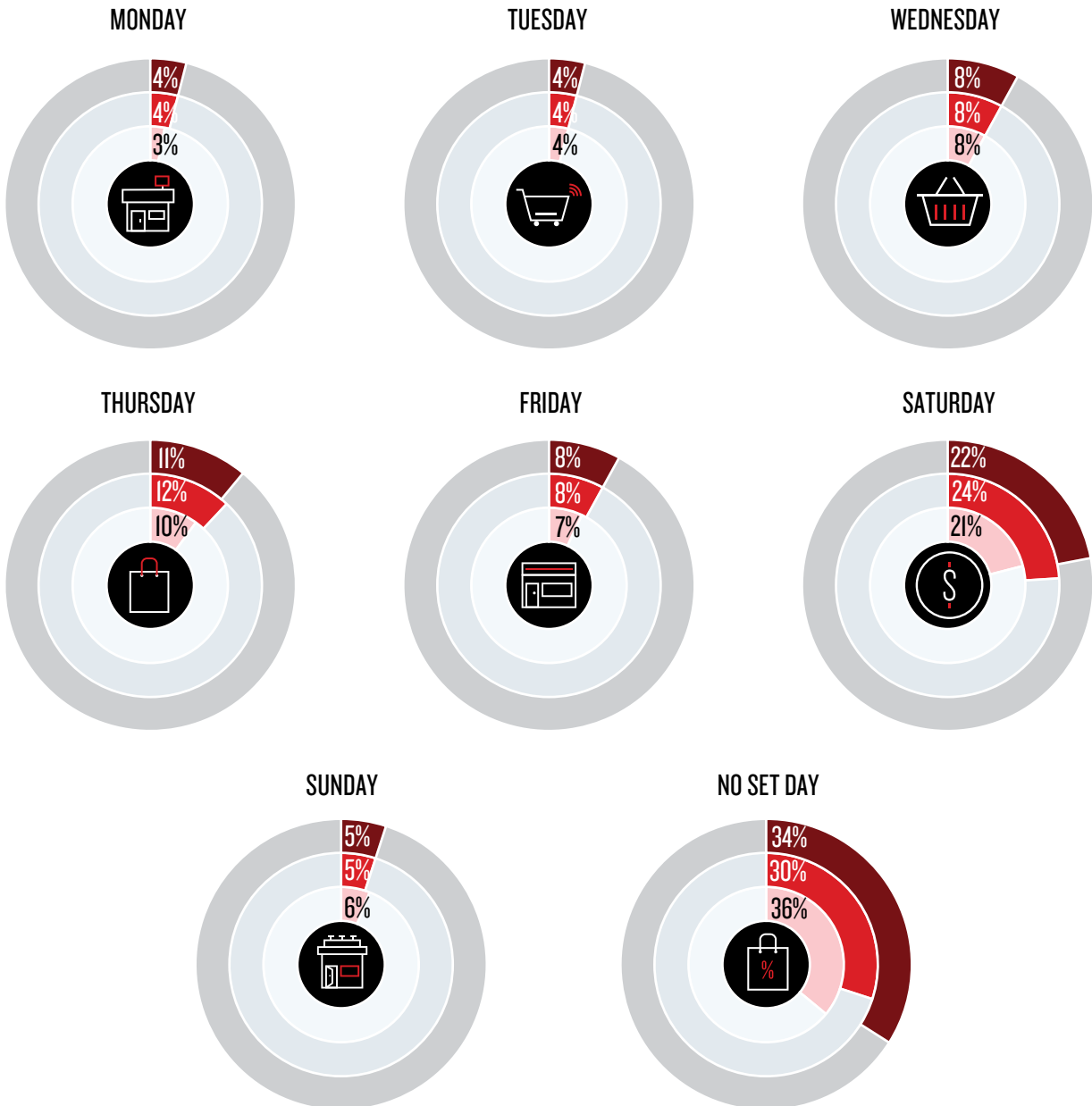
\$ SPENT INSIDE SHOPPING CENTRE PER WEEK	ALL COMMERCIAL RADIO LISTENERS	FASHION FORWARD	FASHION IDLERS
Under \$50	31%	27%	33%
\$51-\$100	28%	31%	27%
\$101-\$200	25%	26%	25%
Over \$200	10%	10%	10%

ENTERTAINMENT - AVERAGE SPEND PER WEEK	ALL COMMERCIAL RADIO LISTENERS	FASHION FORWARD	FASHION IDLERS
Average entertainment spend per week \$	\$59	\$66	\$54

[% of column group]
 [Base: Commercial Radio Listeners 14+]

Fashion Forward are more likely to shop Saturdays; whereas Fashion Idlers are the most likely to have no set shopping day.

DAYS VISIT THE SHOPPING CENTRE



■ ALL COMMERCIAL RADIO LISTENERS ■ FASHION FORWARD ■ FASHION IDLERS

[% of column group]
[Base: Commercial Radio Listeners 14+]

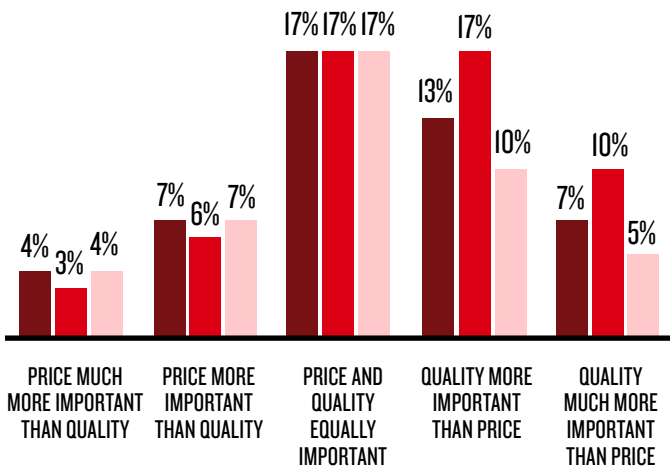


PRICE OR QUALITY?

The Fashion Forward segment is more likely to be quality-driven when it comes to clothes/fashion/footwear and cosmetics. Comparatively, Fashion Idlers are focused more on quality when it applies to home electronics.



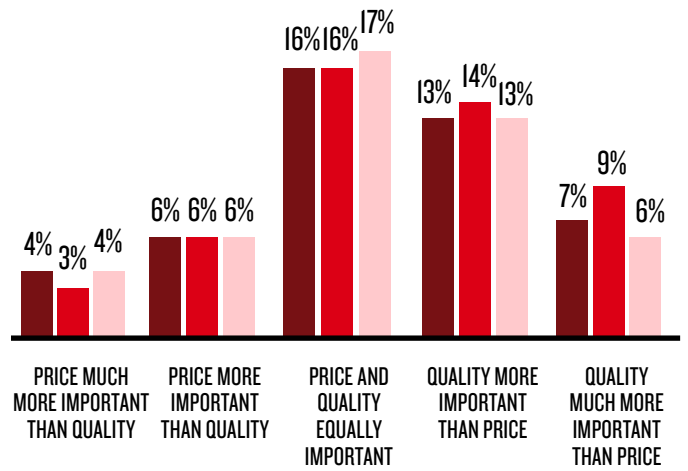
FASHION/CLOTHING/FOOTWEAR



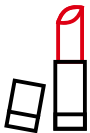
[% of column group]
[Base: Commercial Radio Listeners 14+]



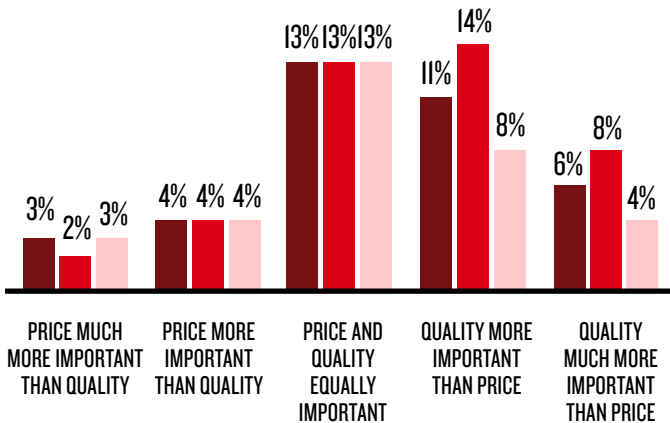
LEISURE/ENTERTAINMENT



[% of column group]
[Base: Commercial Radio Listeners 14+]



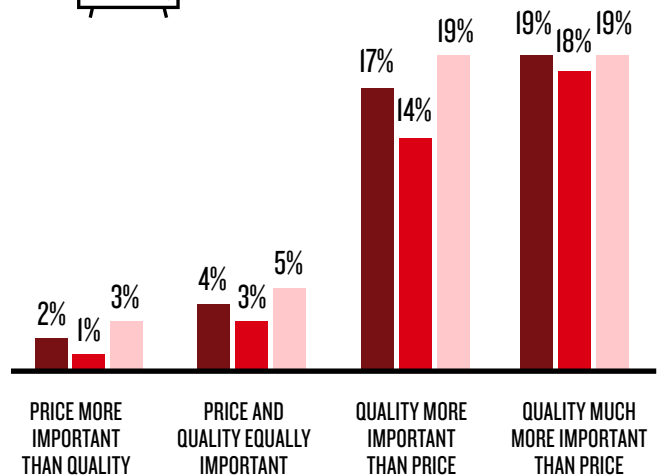
BEAUTY/COSMETIC PRODUCTS



[% of column group]
[Base: Commercial Radio Listeners 14+]



HOME ELECTRONICS



[% of column group]
[Base: Commercial Radio Listeners 14+]

■ ALL COMMERCIAL RADIO LISTENERS ■ FASHION FORWARD ■ FASHION IDLERS

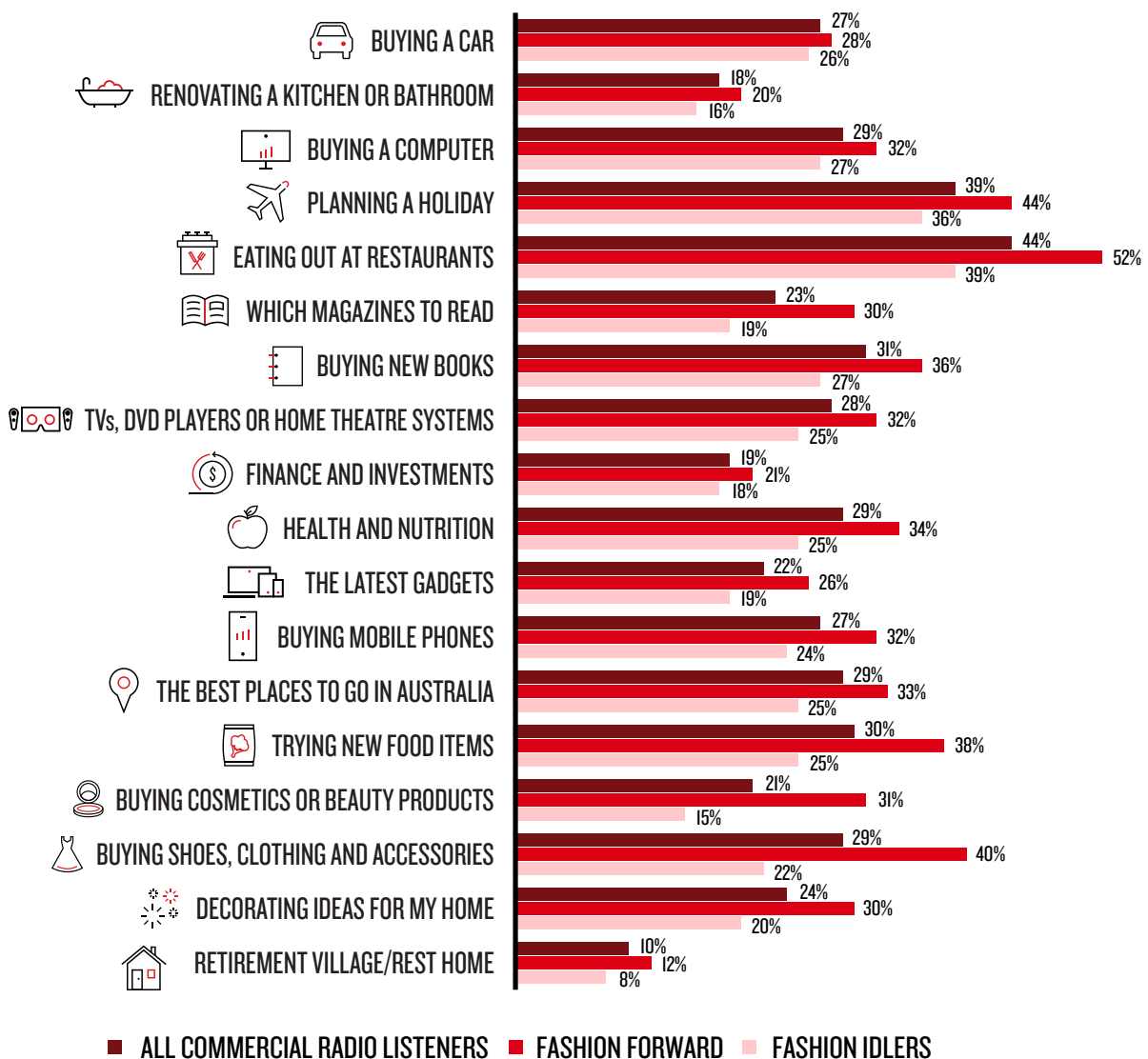


INFLUENCED OR INFLUENCERS?

The Fashion Forward group is more likely to give advice across a wide range of categories including eating out, gadgets, cosmetics and fashion. But, they listen, too, seeking advice on the same topics.

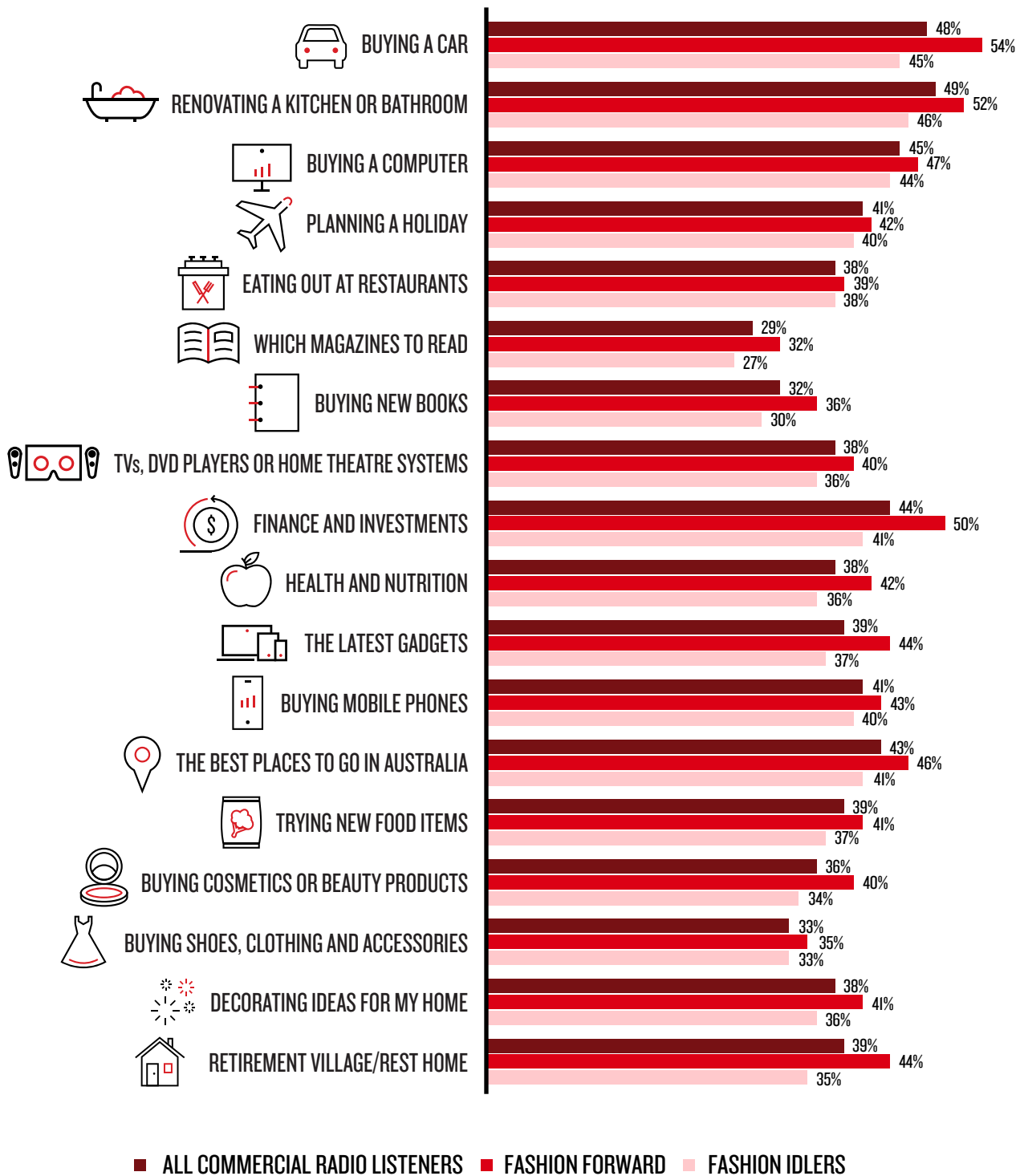
Fashion Idlers are less likely to give advice, and are in line with the population average for seeking advice.

GIVE ADVICE ON CATEGORY



[% of column group]
[Base: Commercial Radio Listeners 14+]

SEEK ADVICE ON CATEGORY



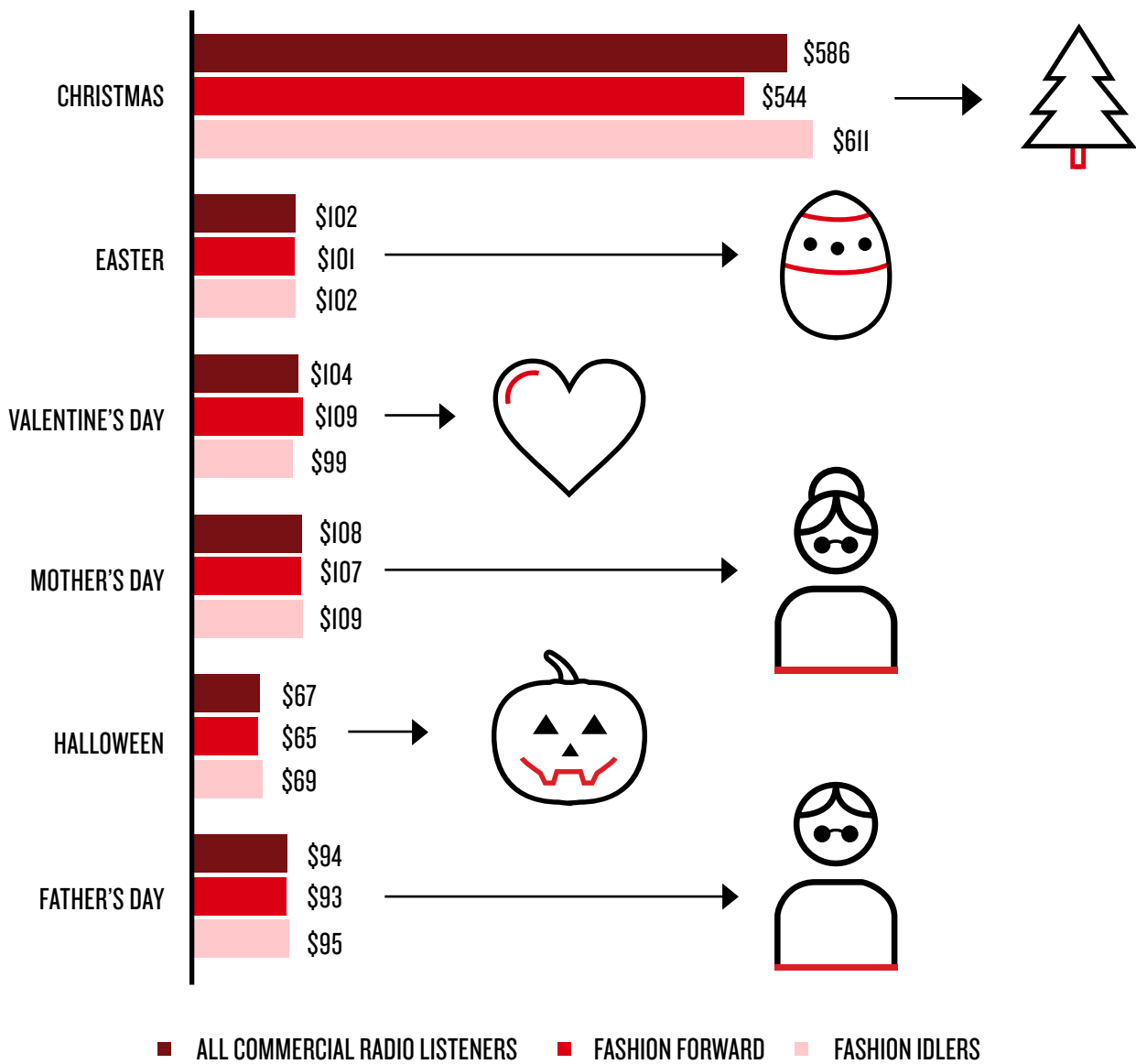
[% of column group]
 [Base: Commercial Radio Listeners 14+]



SPECIAL OCCASION BUYING

Fashion Idlers spend more on Christmas, Mother's/Father's Day and Halloween, while those in the Fashion Forward group spend the most on Valentine's Day.

AVERAGE SPEND \$\$

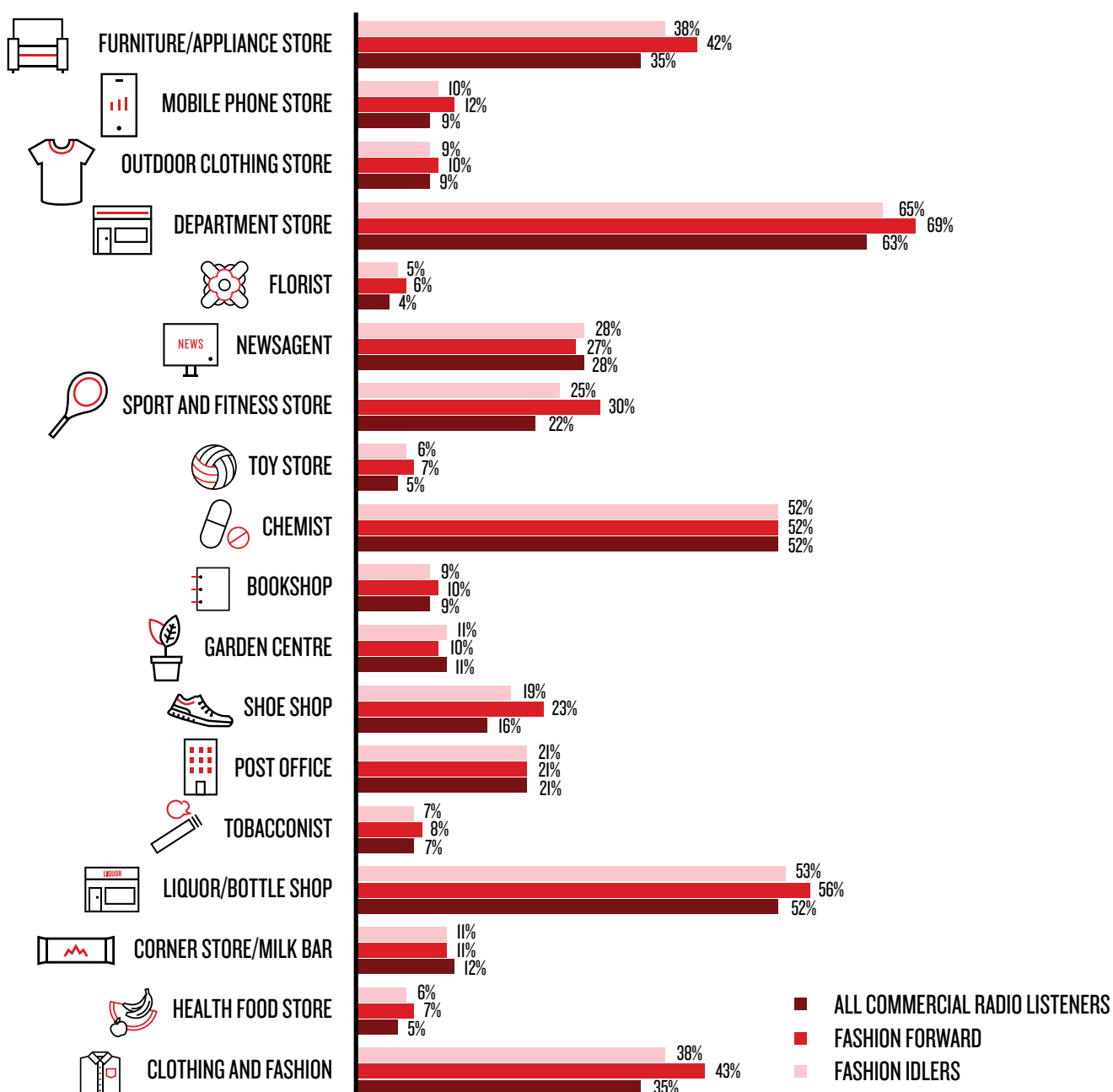


[% of column group]
[Base: Commercial Radio Listeners 14+]

STORE TYPES

Those in the Fashion forward group are more likely to have bought from sports/fitness stores, shoe shops and clothing/fashion stores in the past month, while Fashion Idlers are more likely to have bought from a newsagent or garden centre.

BOUGHT FROM IN PAST MONTH



[% of column group]
[Base: Commercial Radio Listeners 14+]

METHODOLOGY

NIELSEN CONSUMER AND MEDIA VIEW

Consumer and Media View (CMV) is based on information collected from a national sample of people aged 14+. The survey methodology is a combination of an online self-complete questionnaire and fused media currency ratings for TV (OzTAM), Radio (GFK) and Online (Nielsen).

Data is weighted using estimates from the Australian Bureau of Statistics to produce statistically reliable estimates for the entire population.

ABOUT THIS REPORT

This report draws findings primarily from the Nielsen Consumer and Media View survey Australia. Unless otherwise specified the report uses data from Consumer and Media View Survey 08 2017 (Oct 16-Sept 17) including GFK Radio Survey 6 2016 (Aug17-Sep17). Both Consumer and Media View and GFK surveys cover the five major metropolitan markets of Sydney, Melbourne, Brisbane, Adelaide and Perth.

Commercial radio listeners are defined as listeners to any of the following stations between Mon-Sun 5:30 am-12 midnight (Cume):

2CH, 2GB, Talking Lifestyle 954, WSFM, 2DAY, NOVA96.9, 2MMM, smoothfm95.3, KIIS1065; SKY Sports, SEN 1116, 3AW, NOVA100, Talking Lifestyle 1278, FOXFM hit 1019, GOLD, 3MMM, MIX 101.1, smoothfm91.5, 4BC, Talking Lifestyle 882, 97.3FM, 4KQ, hit105.3, Nova 106.9, 4MMM, 5AA, Cruise 1323, MIX 102.3, 5MMM, hit107, NOVA 91.9, 6IX, 94.5FM, 6PR, 96FM, hit92.9, NOVA93.7

ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a global performance management company that provides a comprehensive understanding of what consumers watch and buy. Nielsen's Watch segment provides media and advertising clients with Nielsen Total Audience measurement services for all devices on which content — video, audio and text — is consumed. The Buy segment offers consumer packaged goods manufacturers and retailers the industry's only global view of retail performance measurement. By integrating information from its Watch and Buy segments and other data sources, Nielsen also provides its clients with analytics that help improve performance. Nielsen, an S&P 500 company, has operations in over 100 countries, covering more than 90% of the world's population. For more information, visit www.nielsen.com.



THE SCIENCE BEHIND WHAT'S NEXT™