



How Mexico City Radio Reaches Consumers at Work and in Vehicles



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Arbitron's Commitment to Serve the Radio Market of Mexico City

- In 2000 Arbitron produced the Media Targeting 2000 study, which showed how radio captures a large share of media time spent. That study showed radio's ability to reach key groups of consumers among many product and service categories. And now, we are proud to present our newest study to the Mexico City marketplace...
- *Radio On the Go* proves radio's powerful ability to reach and influence consumers out of home, in a vehicle and at work. It is part of our commitment to serve the radio industry of Mexico City.
- We will continue to produce studies to prove the strength of radio and to inform our clients.



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Summary of Key Findings:

- Consumers spend a great deal of time on the go, and they spend a lot of that time with radio, in vehicles and at work.
- Radio is the “King of all Media” in the workplace. Radio dominates media reach in Mexico City workplaces.
- Radio listeners tend to keep one station on rather than switching around a lot. This radio station loyalty means the advertiser’s message has greater impact.
- Radio listening is the dominant activity in vehicles.
- Radio leads all other media in “Recency,” the ability to reach consumers just prior to when they make their purchases.



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How the survey was conducted:

- 2,502 completed personal in-home Interviews of adults 18 and over
- Interviews conducted in Mexico City in December 2001
- Sample composition matches Mexico City population

Also, analysis from 14,993 Arbitron Radio Diaries (Fall 2001, Winter 2002, Spring 2002).



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Overview

- Media habits
- Importance of radio programming attributes
- How people move around Mexico City
- Radio audiences in vehicles
- The at-work profile of Mexico City
- Radio in the workplace



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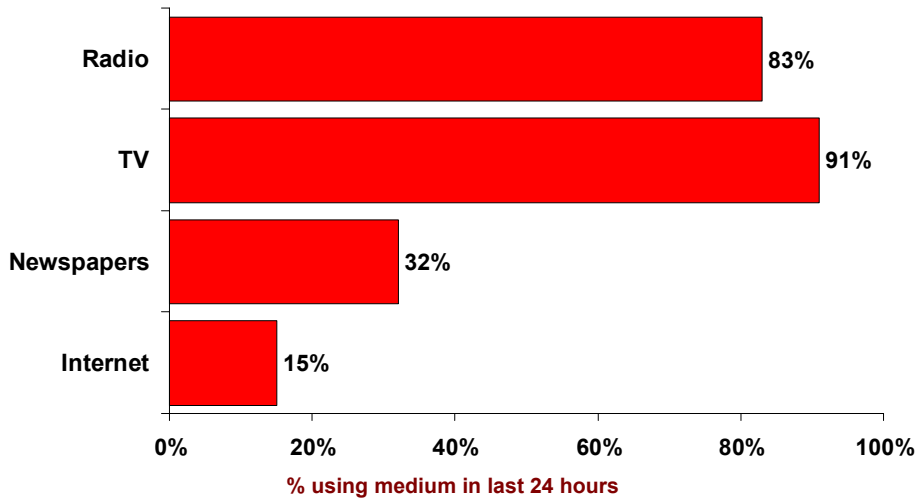


Media Habits



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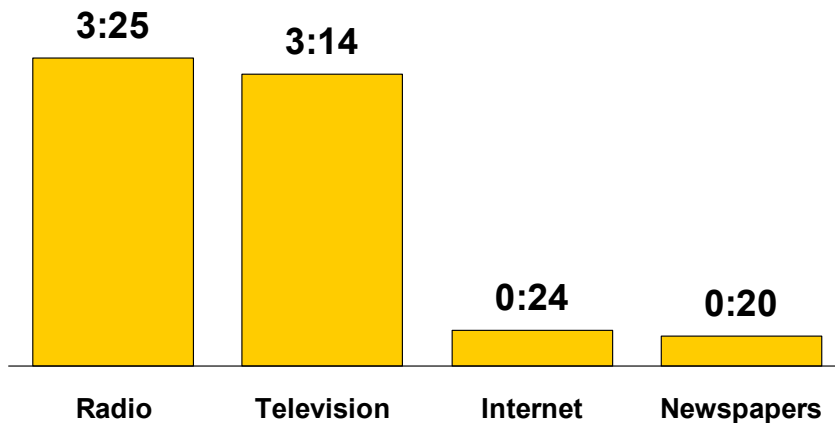
Radio and TV Nearly Tied in Daily Reach



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In an Average Day Consumers Spend More Time with Radio

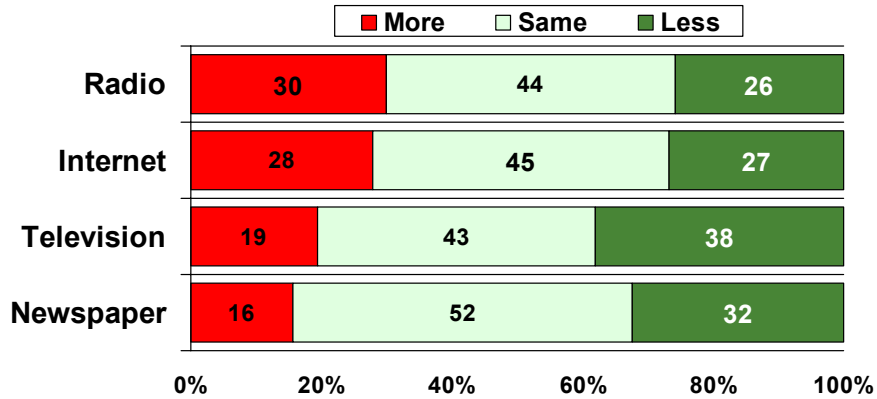
Time Spent Per Day With Medium (hours:minutes)



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30% of Radio Listeners Say They are Spending More Time with Radio

"Are you spending more, less or the same amount of time with (medium) than you were one year ago?"



Base: Use each medium



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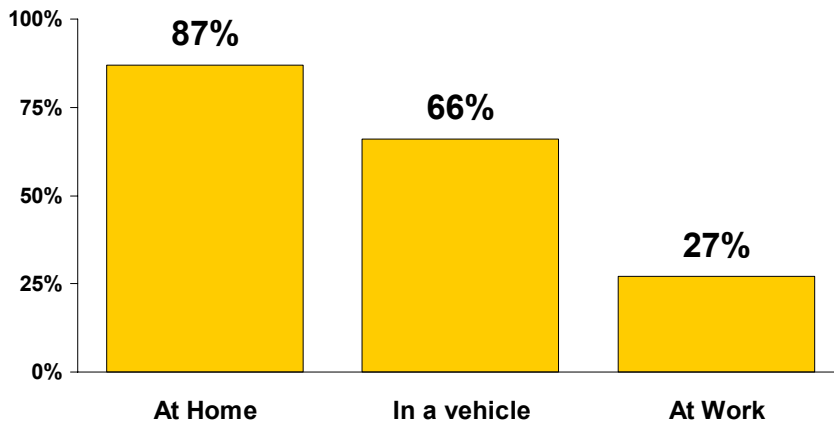


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Radio Shows Strong Reach in Numerous Locations

% Using Radio...



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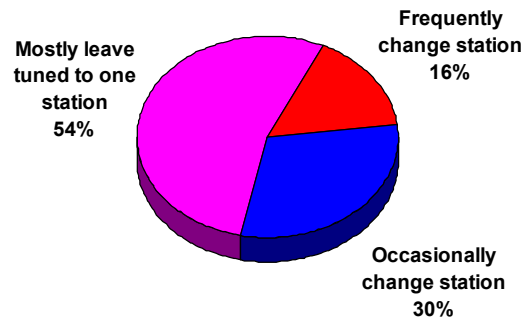
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At Home Most Leave Radio Tuned to One Station

Radio Station Loyalty Means Advertisers' Messages Have Greater Impact

"Think about your radio listening while at home. Do you..."



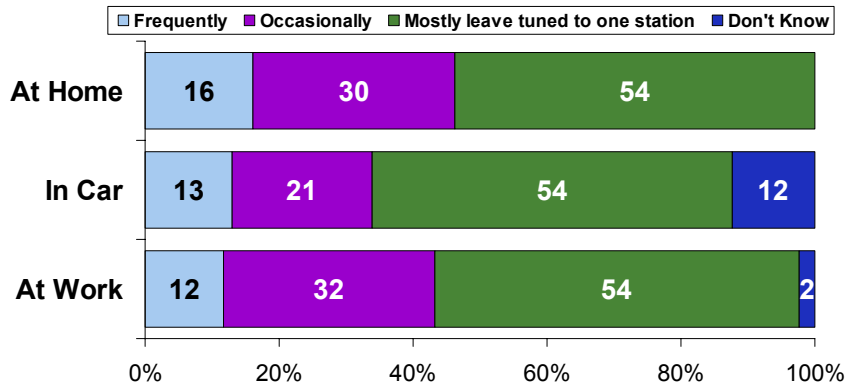
Base: Listen to radio at home



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Most Leave Their Radio Tuned to One Station in All Locations

"Think about your radio listening while (at home/in vehicle/at work). How often do you change the station?"

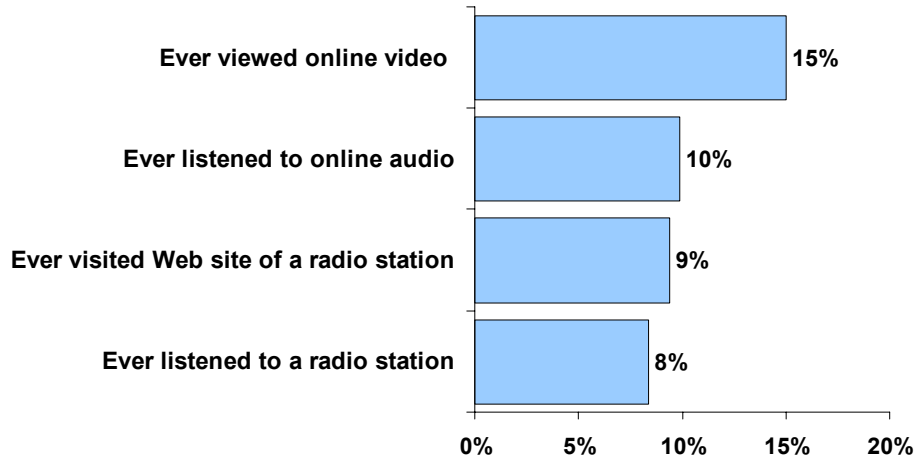


Base: Listen to the radio in each location



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Future Trend “Streaming Media”: Listening to Radio Over the Internet



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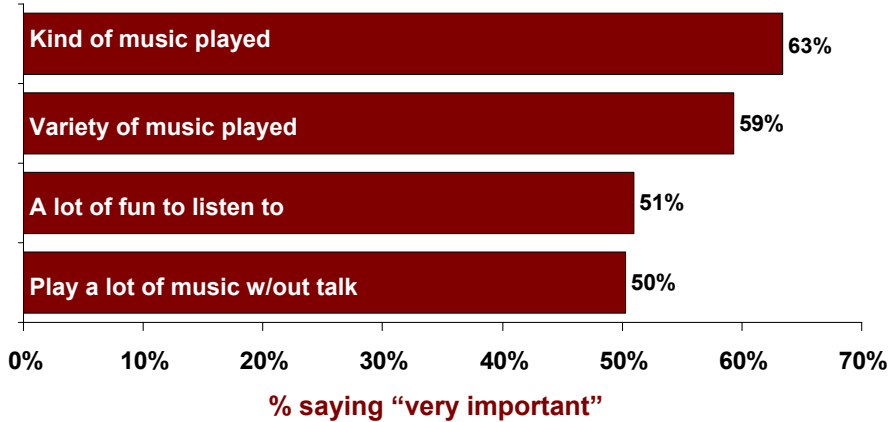
Importance of Radio Programming Attributes



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The Kind of Music and Variety of Music Played are Most Important to Consumers...

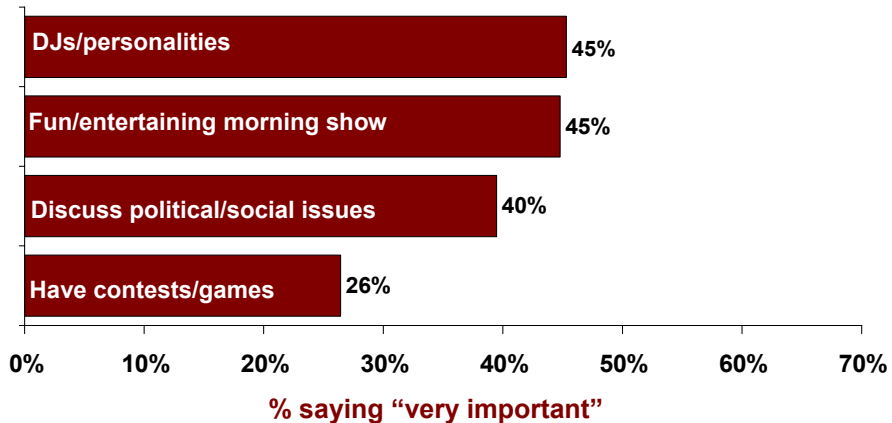
"When choosing your favorite radio station, how important is/are..."



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...While Contests and Games Are Least Important

"When choosing your favorite radio station, how important is/are..."



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Listeners Choose a Station Based Upon Their Perception of that Station's Specialization

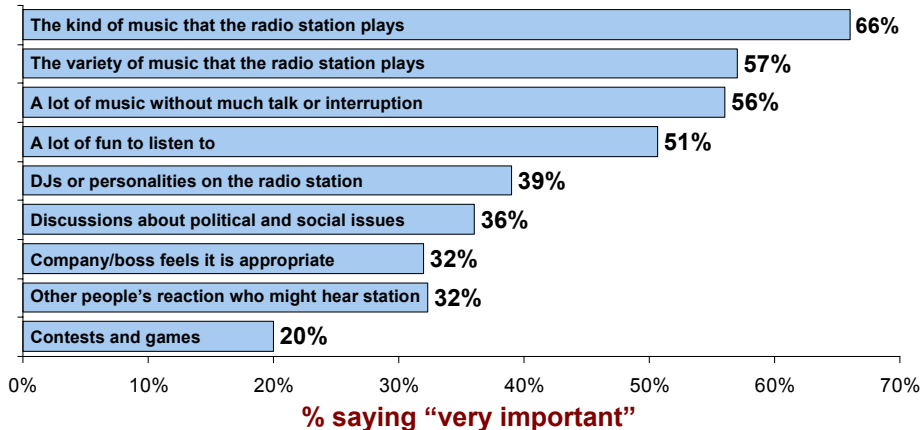
- Radio station format specialization is the number one factor that drives listener choice and audience.
- Achieving a clear, unique and simple position in the minds of listeners is vital. Listeners want a clear understanding of what a radio station is known for and specializes in.



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When Choosing an At-Work Station Music is Most Important

"When choosing a radio station to listen to at work, how important is/are..."



Base: Listen to the radio at work

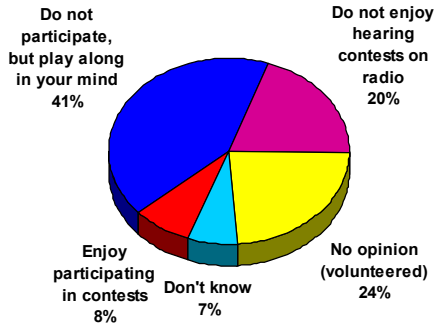


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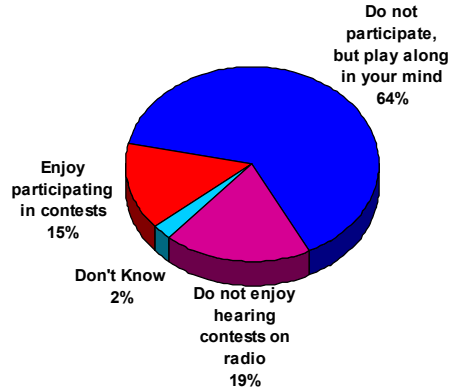
Most Consumers Do Not Participate But Play Along with Contests in Their Mind

"Which statement about contests on the radio best describes your opinion?"

Mexico City Data



U.S. Nationwide Data



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RADIO



ON *the* GO

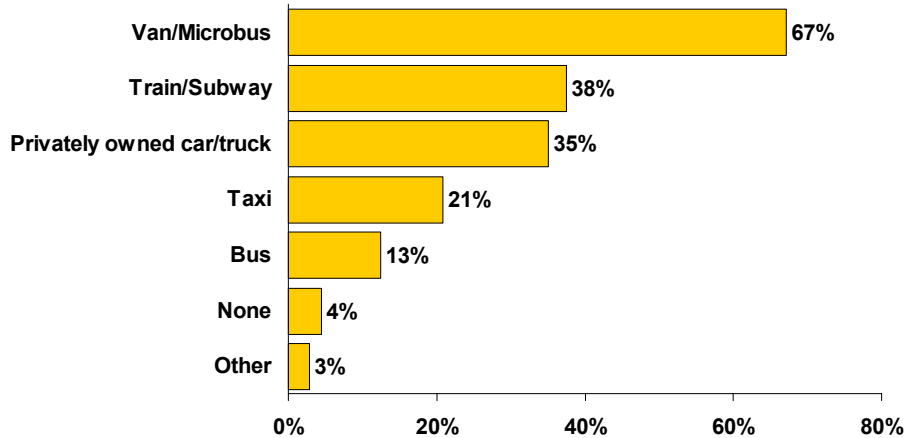
How People Move Around Mexico City



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In a Typical Day a Van or Microbus is Used by Most For Travel

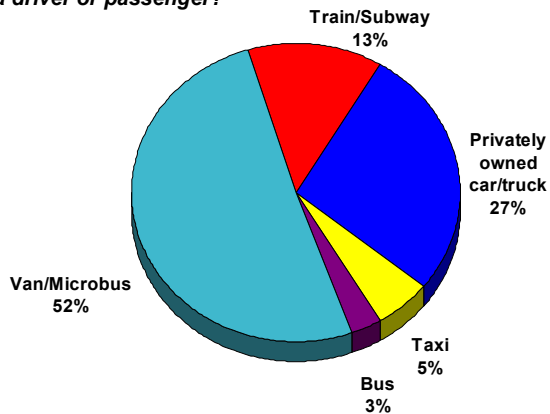
"In a typical day, which different types of vehicles do you ride in as a driver or passenger?"



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Type of Vehicle Used Most

"In a typical day, which type of vehicle do you spend the MOST amount of time riding in as a driver or passenger?"



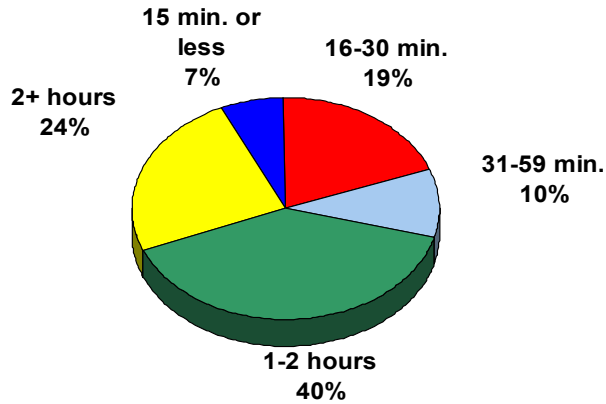
Base: Travel in a vehicle in a Typical Day



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Most Consumers Spend Over an Hour a Day in a Vehicle

"In a typical day, how much time would you say you spend riding in a vehicle as a driver or passenger?"



Base: Travel in a vehicle in a Typical Day



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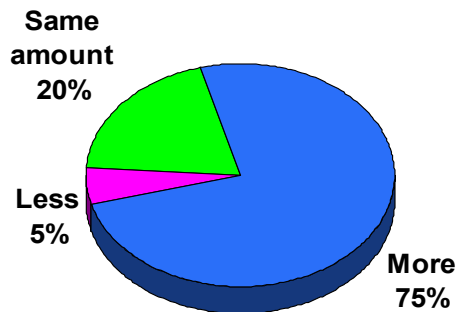


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Travelers Encountering More Traffic Than One Year Ago

"When riding in a vehicle, would you say you are encountering more, less, or the same amount of traffic than you did one year ago?"



Base: Travel in a vehicle in a Typical Day



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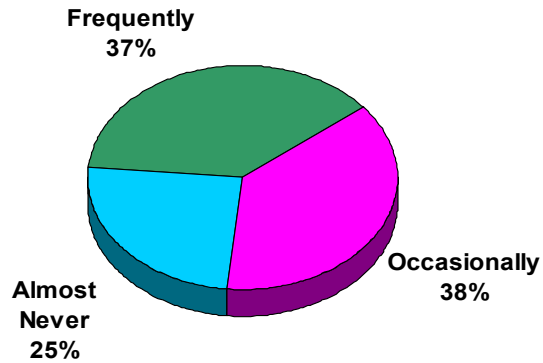


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Nearly Four in Ten “Frequently” Listen to Traffic Reports on The Radio

“How often do you listen to traffic reports on the radio?”



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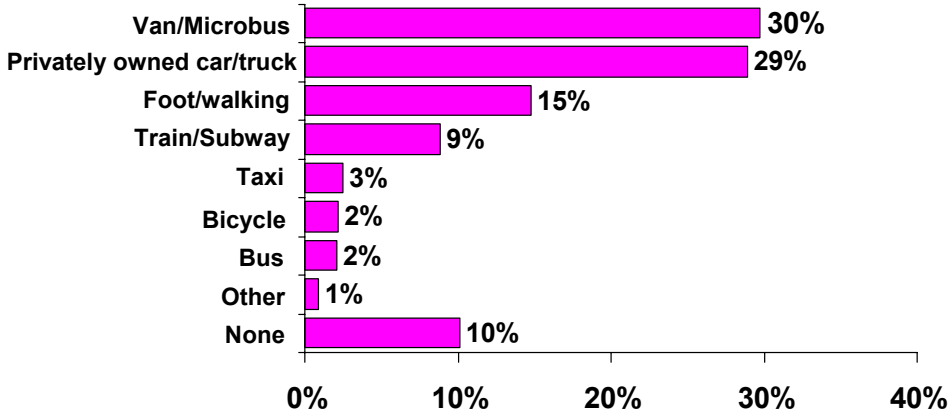
Getting to Work in Mexico City



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Most Commute to Work Via Van, Microbus or Private Vehicle

"How do you usually get to your primary job?"



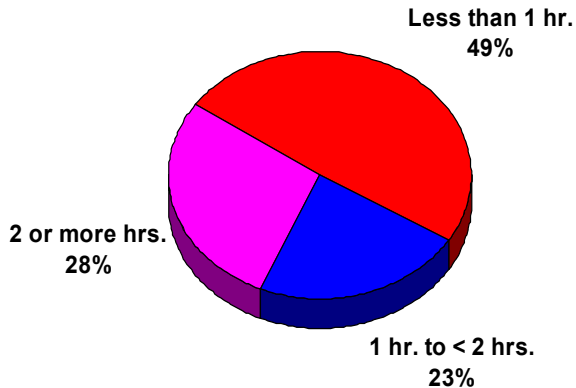
Base: Employed



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Consumers Spend a Large Amount of Time Commuting

"How much time do you usually spend commuting to work one way?"



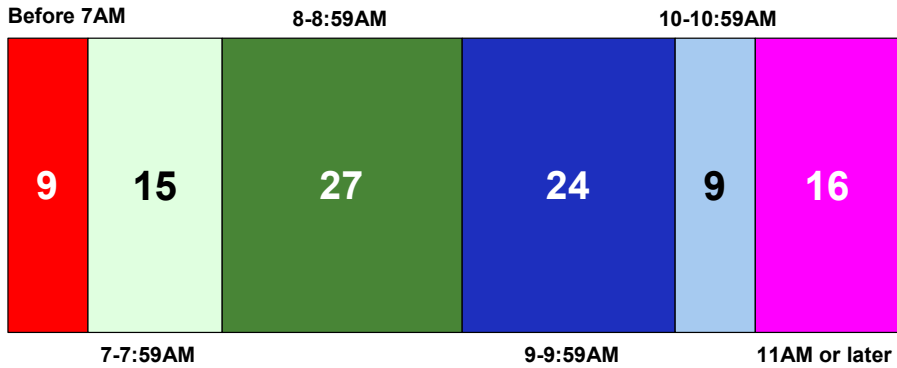
Base: Employed



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Majority Begin the Workday Before 9AM

"What time of day do you usually start work at that primary job?"



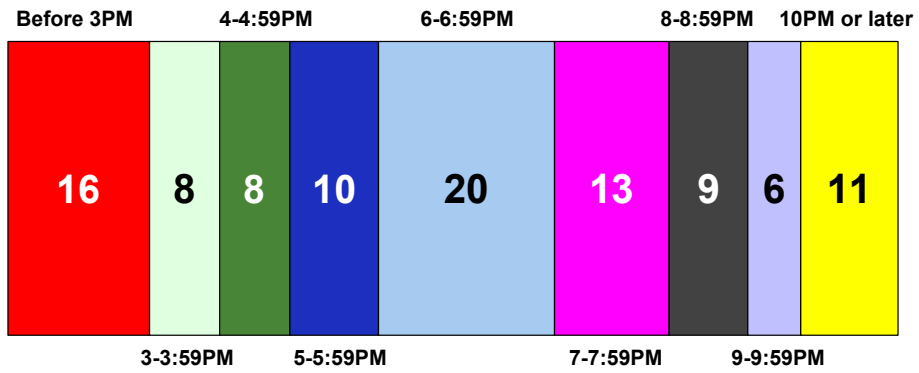
Base: Employed



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Majority End the Workday 6PM or Later

"What time of day do you usually stop work at that primary job?"



Base: Employed



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The Radio Audience in Vehicles



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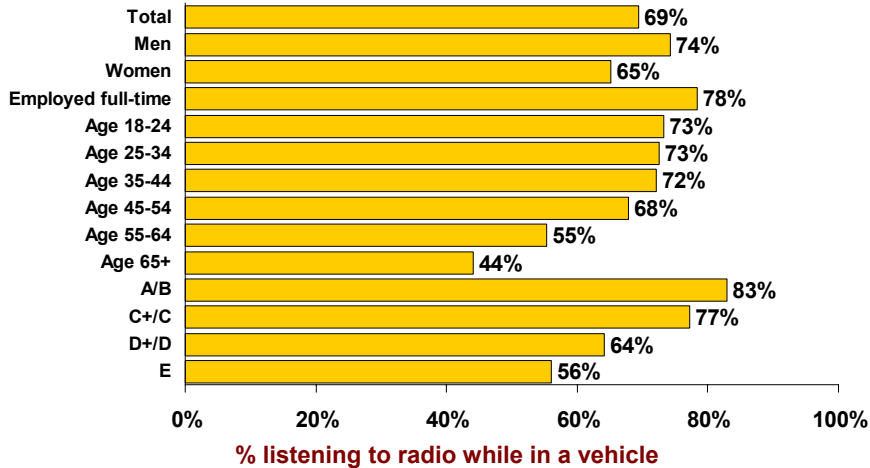
Radio is Dominant In-Vehicle Medium

- Radio is a powerful method to reach Mexico City consumers when they are out and near stores and have the means to make purchases.
- Seven out of ten vehicle passengers listen to radio.
- Of those that listen, 55% say they listen “frequently” to radio.



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Majority of Travelers are Listening to Radio While Riding in a Vehicle



Base: Travel in a vehicle in a Typical Day



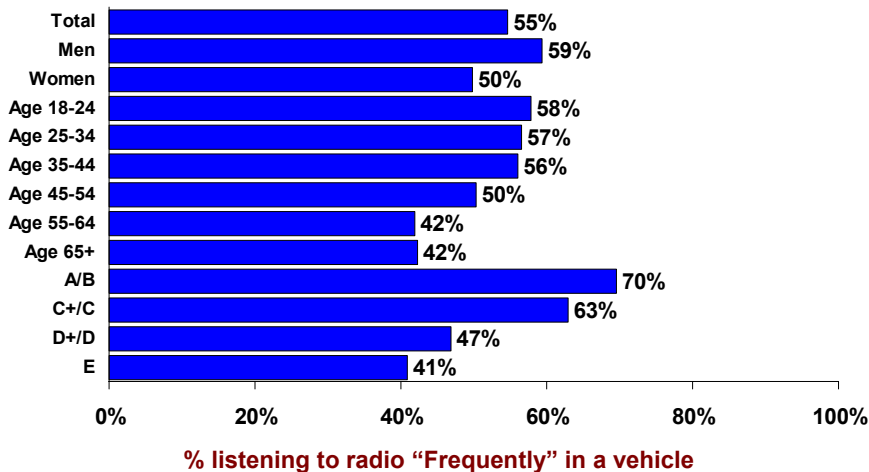
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How Many "Frequently" Listen to Radio in a Vehicle?



Base: Listen to radio while riding in a vehicle



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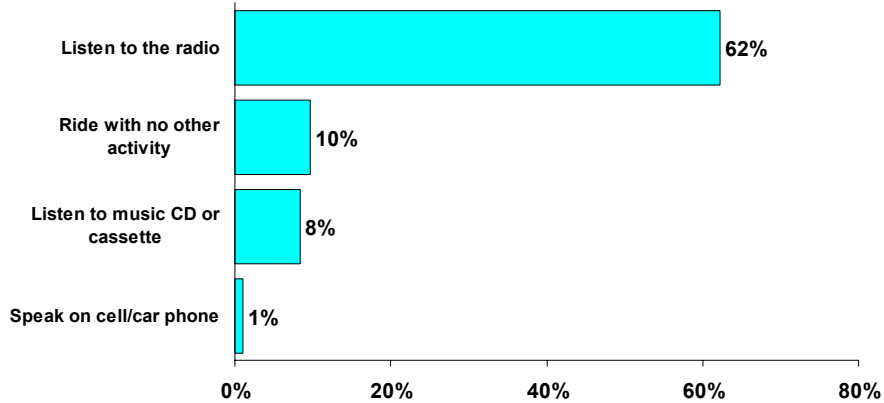


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Radio is the Dominant In-Vehicle Activity

"In a typical day, which activity do you spend the most time doing while riding in a vehicle?"



Base: Travel in a vehicle in a Typical Day

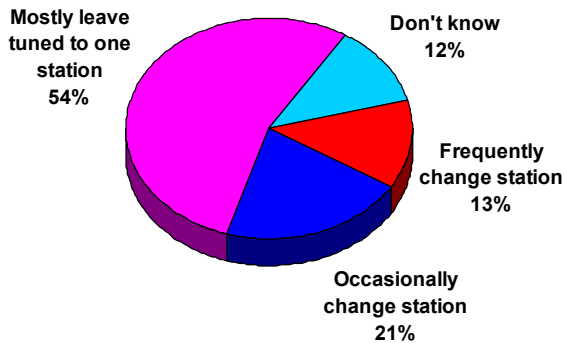


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Most Leave Their Radio On One Station While in a Vehicle

Radio Station Loyalty Means Advertisers' Messages Have Greater Impact

"Think about your radio listening while riding in a vehicle. Do you..."



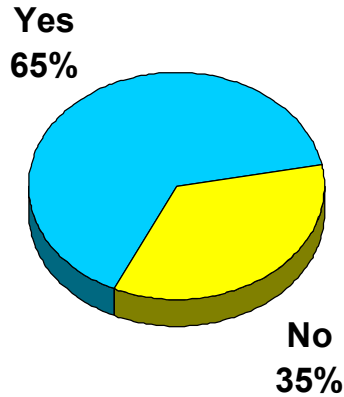
Base: Listen to radio while riding in a vehicle



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Most Consumers Listen to Radio When Others are Riding in Vehicle with Them

"Do you ever listen to the radio when others are riding in a vehicle with you?"

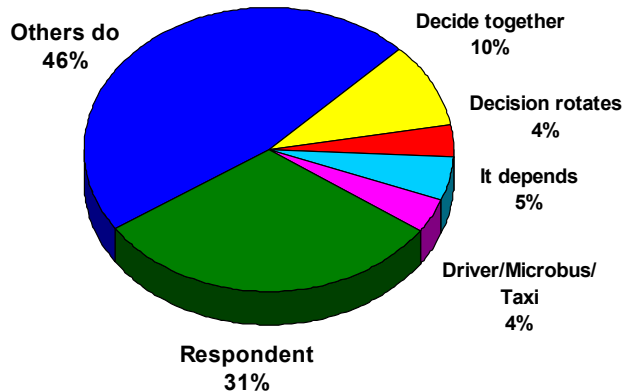


Base: Travel in a vehicle in a Typical Day



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When Riding with Others, Who Chooses the Station?

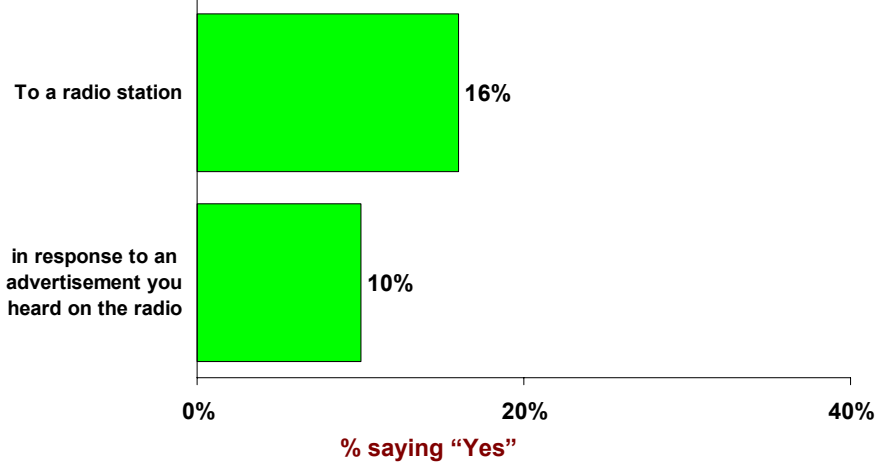


Base: Listen to radio when traveling with others in a vehicle



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While Riding in a Vehicle, Have You Ever Used a Cell or Car Phone to Place a Call...



Base: Use a cell/car phone while riding in a vehicle



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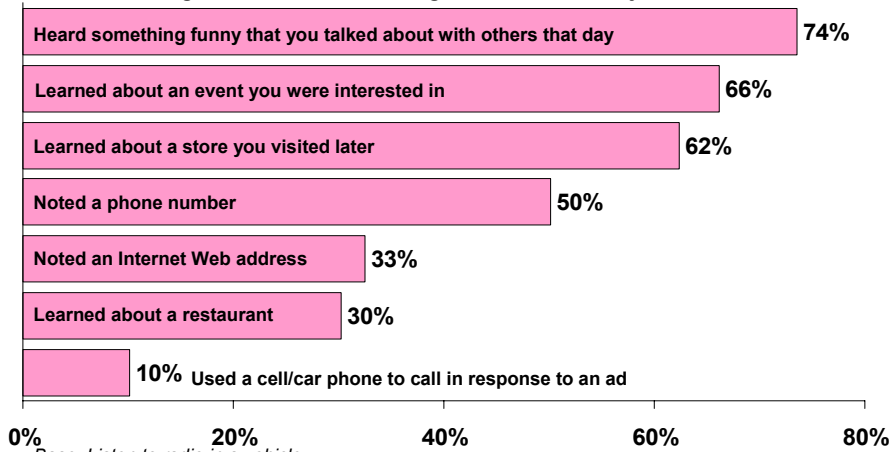


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When Heard in a Vehicle, Radio Causes Consumers to Learn, Respond and Act

"While listening to the radio while riding in a vehicle, have you ever..."



Base: Listen to radio in a vehicle



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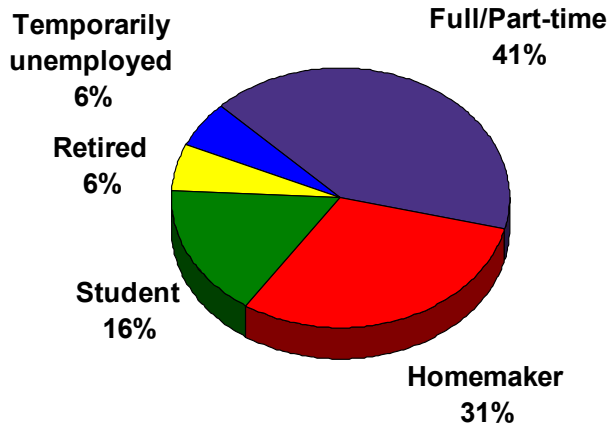
The At-Work Profile of Mexico City



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In Mexico City Four in Ten are Employed

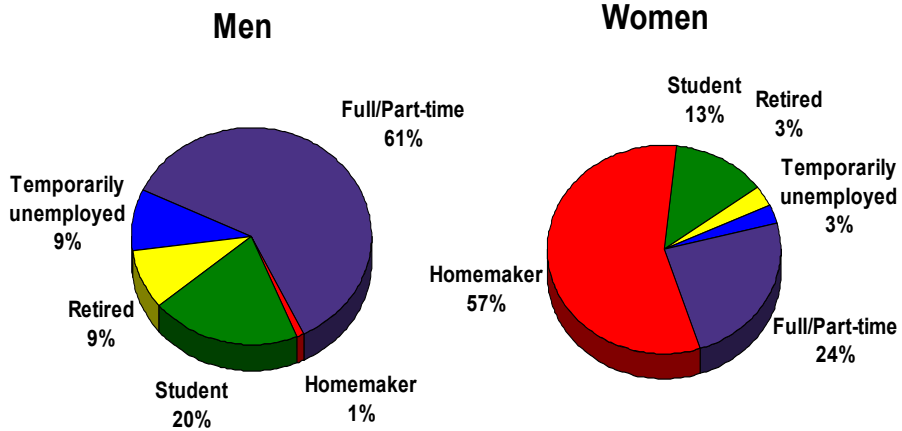
"Which best describes your current employment status?"



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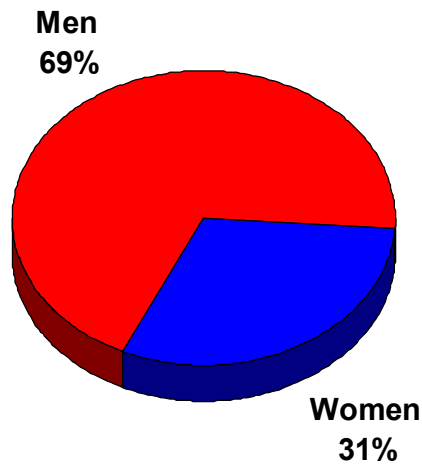
A Larger Proportion of Men are Employed...

"Which best describes your current employment status?"



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...Therefore the Workforce is 69% Male

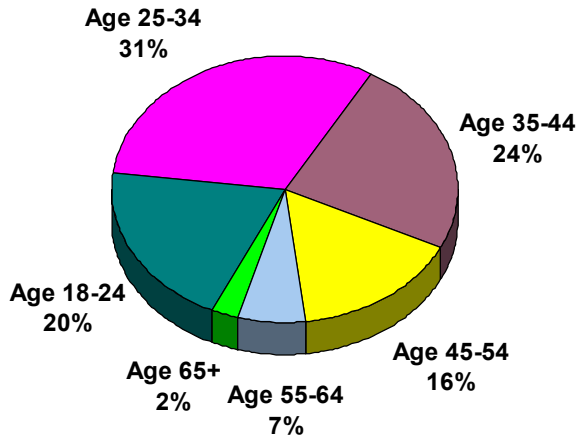


Base: Employed



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55% of Workforce is 25-44 Years Old



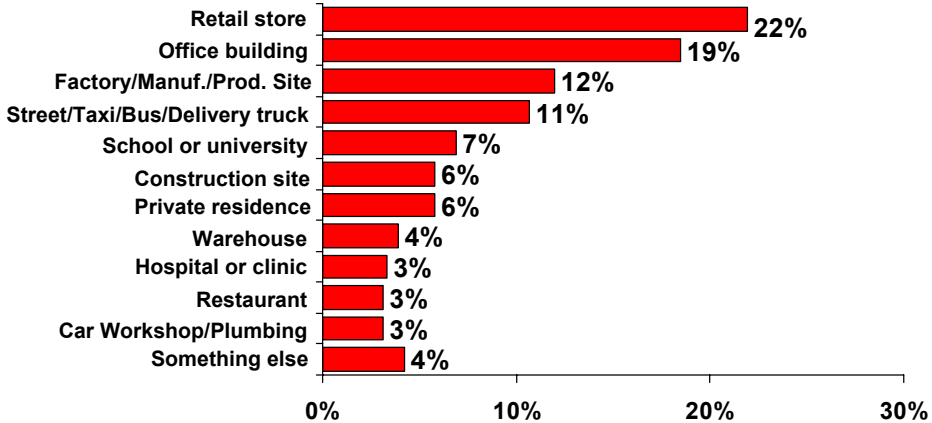
Base: Employed



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The Top Two Workplaces are Retail Stores and Office Buildings

"Which best describes the place where you work?"

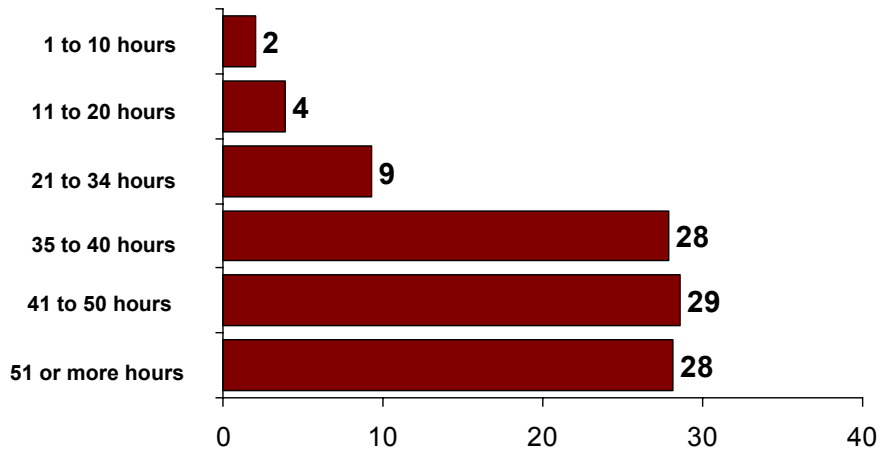


Base: Employed



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How Many Hours Per Week Do You Work?



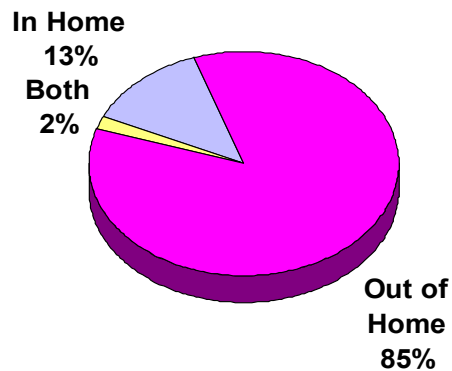
Base: Employed



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An Overwhelming Majority of People Work Outside of the Home

"Is your work done mostly inside or outside your home?"



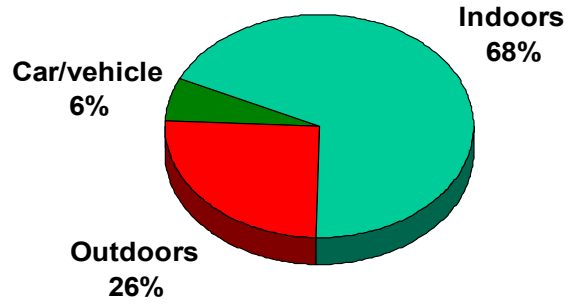
Base: Employed



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Most People Work Indoors

"Is most of your time at work spent indoors, outdoors, or in a car/vehicle?"



Base: Employed



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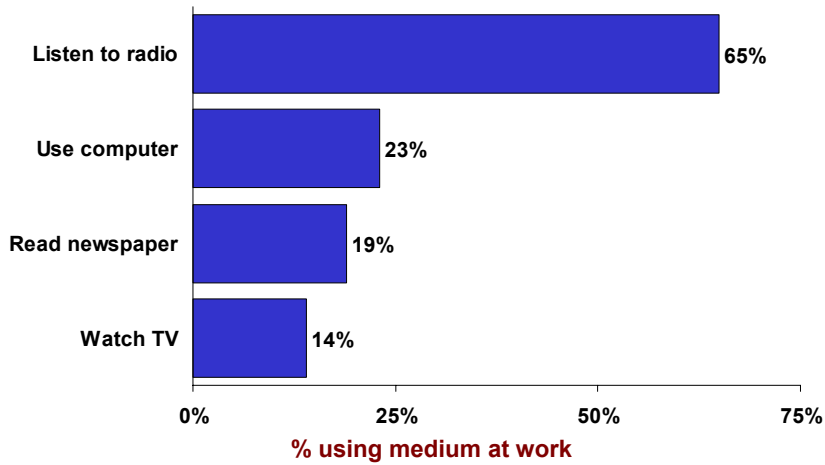


Radio in the Workplace



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Radio is “King of All Media” at Work



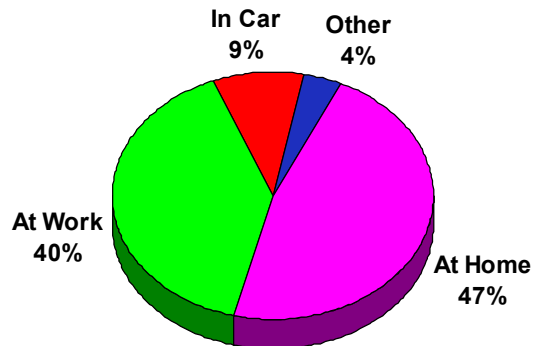
Base: Employed



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Among Those Employed, 40% of All Radio Time Spent Occurs At Work

% Of All Quarter-Hours of Listening by Location



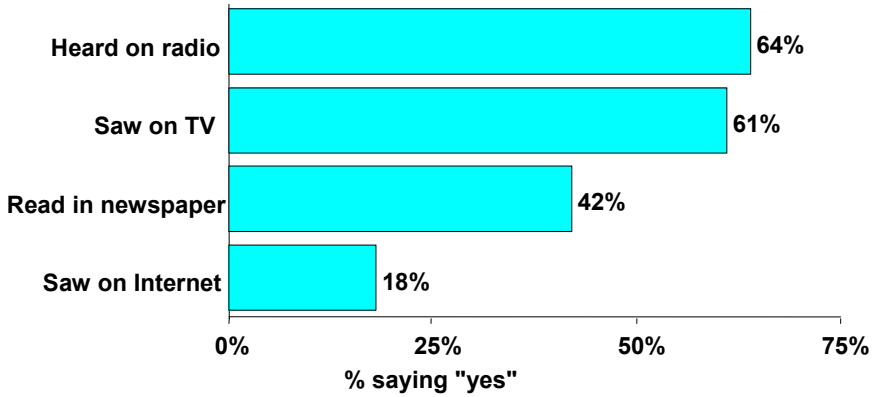
Source: Arbitron Radio Diaries;
Fall 2001/Winter 2002/Spring 2002;
Among 18+ employed Full or Part-time



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Radio is Top Source for Casual At-Work Discussion

"Think about the casual conversations you have with the people you work with. In the last week, have you talked about something you..."



Base: Employed



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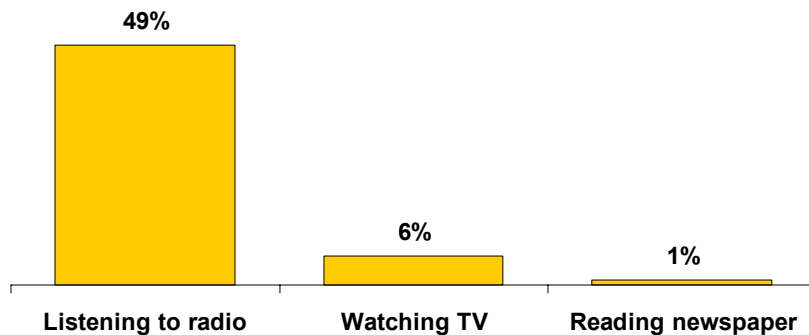


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Workers Spend the Most Time with Radio

% Spending Two or More Hours With Medium At Work



Base: Employed



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A Majority of At-Work Radio Users Listen for Four Hours or More

"In an average day, how much time do you spend listening to the radio while you are working?"



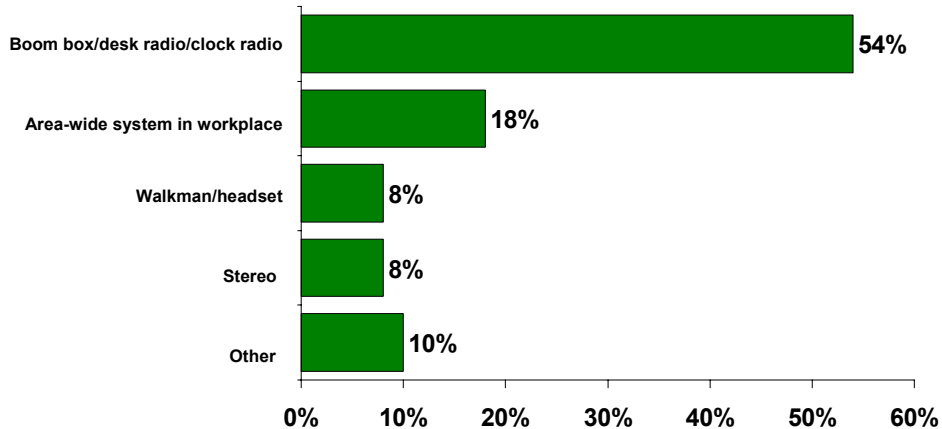
Base: Listen to the radio at work



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Most Listen to Radio At Work on a Boom Box or Desk Radio

"Which is closest to the way you listen to radio while working?"



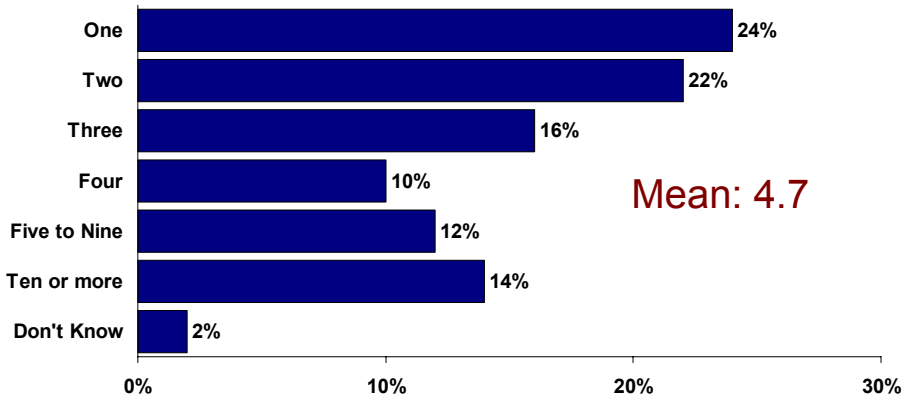
Base: Listen to radio at work



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On Average, Nearly Five People Listen to the Same Radio in the Workplace

“When you listen to the radio at work, how many people, including yourself, are listening to the same radio that you are?”



Base: Listen to the radio at work



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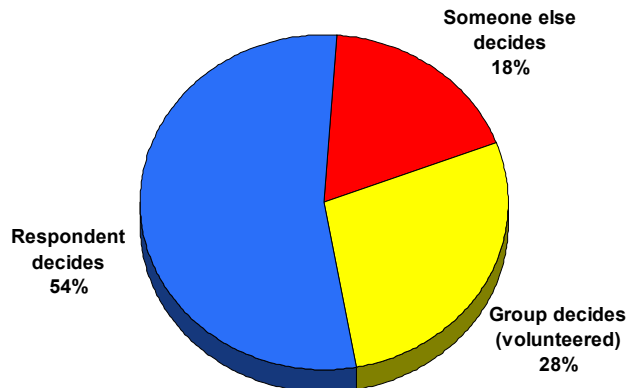


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Most Decide Station to Listen to At Work For Themselves

“Are you the person who decides what radio station to listen to at work or does someone else usually decide?”



Base: Listen to the radio at work



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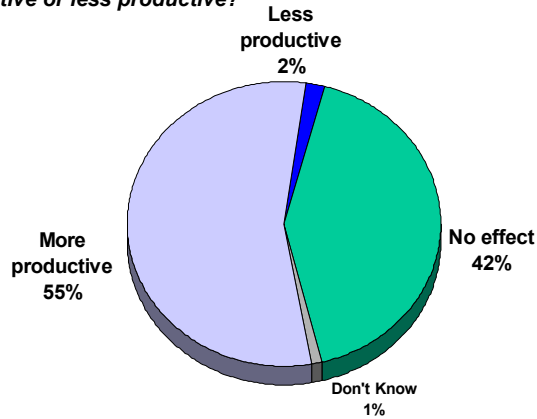


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Majority of Workers Say Listening to Radio Makes Work “More Productive”

“Do you feel listening to the radio while you are working makes your work more productive or less productive?”



Base: Listen to the radio at work

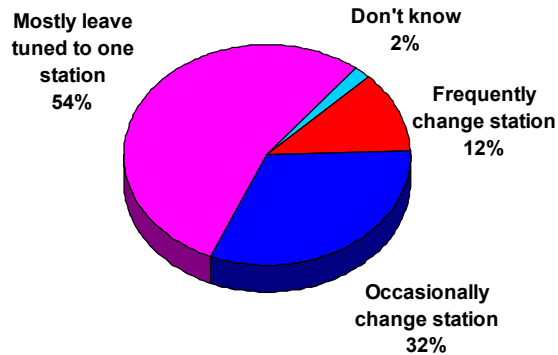


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Most Leave Their Radio On One Station While At Work

Radio Station Loyalty Means Advertisers' Messages Have Greater Impact

“Think about your radio listening while working. Do you...”



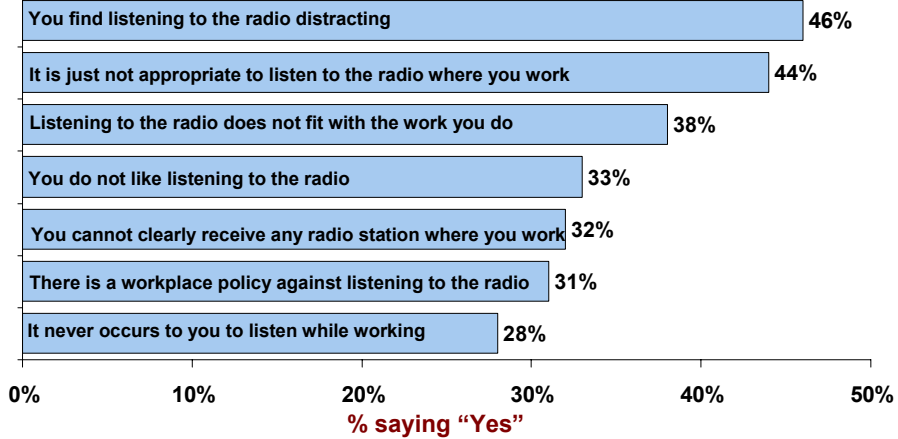
Base: Listen to radio at work



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Why People Do NOT Listen to Radio At Work

"Is this a reason why you do not listen to the radio while working?"



Base: Don't listen to the radio at work; 36% of those employed



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RADIO



ON the GO

Recency



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What is “Recency”?

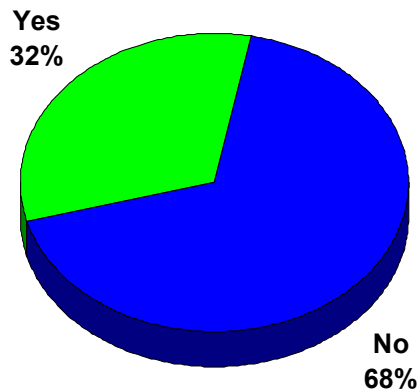
- Recency examines media exposure just prior to purchases being made by consumers
- Noted media researcher Erwin Ephron: “Advertising influences the brand-choice of consumers who are in the market for a product. Visualize a window of advertising opportunity in front of each purchase. Recency planning’s job is to place the message in that window.”



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One-Third of Mexico City Consumers Have Made a Purchase in Last 24 Hours

“During the past 24 hours, did you buy anything at a supermarket, dept. store, or any other store?”



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Recency

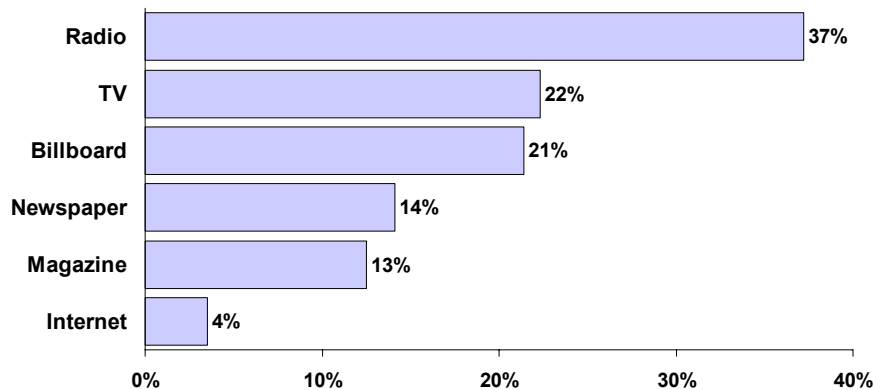
- If reaching a consumer just prior to their purchases and shopping is so vital, which media do the best job of reaching Mexico City consumers in that crucial period before purchasing occurs?



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Radio Leads as the Medium for Reaching Consumers Just Prior to Their Purchases

Media Exposed to Less Than One Hour Prior to Purchases



% doing activity within one hour of purchase

Base: Made a purchase in last 24 hours



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Summary of Key Findings:

- Consumers spend a great deal of time out of home, and they spend a lot of that time with radio, in vehicles and at work.
- Radio is the “king of all media” in the workplace. Radio dominates media reach in Mexico City workplaces.
- Radio listeners tend to keep one station on rather than switching around a lot whether at home, in a vehicle or at work. This radio station loyalty means the advertiser’s message has greater impact.
- Radio listening is the dominant activity in vehicles.
- Radio leads all other media in “Recency,” the ability to reach consumers just prior to when they make their purchases.



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Implications for Advertisers & Agencies:

- Radio is an excellent method to reach “on-the-go” Mexico City consumers while they are “in the shopping zones” around stores during the day.
- Radio is an excellent approach to reach the vital at-work market of Mexico City. People listen to radio while commuting and tune in at work.
- An appealing media environment improves the impact of advertising. Many at-work listeners report that radio makes them “more productive.” The consumer appeal of radio at work means radio is an excellent environment for an advertiser’s message.
- Radio station loyalty reduces the impact of “switching,” and for the advertiser it means that the message will have a greater impact.



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How Mexico City Radio Reaches Consumers at Work and in Vehicles

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