Radio Engages and Influences Listeners
“The reason people are still buying radio is because it works.

Radio is kind of the original micro-targeting and social media”

Evan Tracey
SVP, Communications at American Coalition for Clean Coal Electricity
Faculty at George Washington University Graduate School of Political Management

Source: Politico.com “Radio: The other air war” By: Josh Gerstein, November 1, 2012 04:34 AM EST
PART 2

Delivers Massive Reach in Real Time

Engages and Influences Listeners

Digital Technology Enables Expansion and Interaction

Delivers Outstanding Results

Thriving
engagement
Radio Connects Personally

- **82%** A personal, para-social interaction with their favorite radio personality
- **75%** Radio on because their favorite personality is on-air
- **70%** Follow their favorite personality/radio station on social media
- **72%** Talk to their friends about their favorite personality or program content
- **70%** Consider radio personalities to be a good or best friend or companion*

Because he actually replies to you and makes you feel important

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Sources: USC, Annenberg School for Communication & Journalism, PSI Study released June 2012, Woodley, P. and Movius, L. People With a Favorite Radio Personality in Los Angeles; "Alan Burns “Here She Comes” 2012 online survey of 2,010 women 15-54 in May 2012
Broadcast Radio Listeners Feel the Most Alert

Broadcast Radio: 28%
Live TV: 23%
Mobile Web/App: 18%
Internet: 18%
Print: 14%

Suggesting a Higher Attentiveness Level

Source: 2012.2 MBI USA Touchpoints™
There Is an Emotional Attachment to Radio

9 out of 10 people who use radio heavily would be somewhat or very disappointed if their favorite station were no longer on-air.

83% of Persons 12+
84% of Heavy TV Users
88% of Heavy Radio Users
85% of Heavy Internet Users

% who would be “very” or “somewhat” disappointed if the AM or FM Radio station they listen to most were no longer on-air

Source: The Infinite Dial 2013 – Arbitron Inc./Edison Research
Radio’s Strengths to Reach Consumers

<table>
<thead>
<tr>
<th></th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>Improves your mood</td>
<td>57.4%</td>
</tr>
<tr>
<td>Energizes you</td>
<td>49.1%</td>
</tr>
<tr>
<td>Comforts you</td>
<td>40.7%</td>
</tr>
<tr>
<td>Help you have a good time</td>
<td>41%</td>
</tr>
<tr>
<td>Helps you relax</td>
<td>46.8%</td>
</tr>
<tr>
<td>Keep you company</td>
<td>36.6%</td>
</tr>
<tr>
<td>Has ads that are honest &amp; believable</td>
<td>23.3%</td>
</tr>
</tbody>
</table>

Source: Alan Burns/Triton Digital “The Future of Radio” September 2012 National Consumer Database; 25,000,000 Panelists; August & September 2012; All Ages, Genders and Format Fans; Total Polled = 41,252; Roughly in Line with 2010 Census; Heavily Caucasian
More People Prefer Using Radio to Using Facebook

Question: I would be very disappointed if…

Source: Alan Burns/Triton Digital “The Future of Radio” September 2012 National Consumer Database; 25,000,000 Panelists; August & September 2012; All Ages, Genders and Format Fans; Total Polled = 41,252; Roughly in Line with 2010 Census; Heavily Caucasian
targeted
Radio Takes Targeted Opinion-Maker Messages Where No Other Medium Can

• “Radio gives any campaign or candidate the opportunity to reach voters that aren’t overtly political,” an Obama campaign aide said.

• Radio’s music formats offer a pathway to one of the most coveted demographic groups in this year’s contest: young to middle-aged women, particularly those who shoulder a lot of family responsibilities and don’t have much time to watch TV or update their Facebook page — but do spend plenty of hours in the car.

Source: Politico.com “Radio: The other air war” By: Josh Gerstein, November 1, 2012 04:34 AM EST
More AM/FM Radio Consumed Out of Home Than Other Media

Percent of Overall Usage Consumed Outside the Home, Persons 25-54

Source: 2013.1 MBI USA TouchPoints
Note: TV includes time-shifted viewing; Internet includes PC, mobile & tablet; Newspaper and Magazine includes digital readership.
Radio Reaches Shoppers During Retail Hours

- 75% for 6-10A
- 75% for 10A-3P
- 81% for 3P-7P
- 56% for 7P-12M

Adults 25-54

Source: RADAR 116 March 2013 (Monday-Sunday Weekly Cume Estimates)
Radio Reaches Younger Shoppers During Retail Hours

<table>
<thead>
<tr>
<th>Time</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>6-10A</td>
<td>66%</td>
</tr>
<tr>
<td>10A-3P</td>
<td>72%</td>
</tr>
<tr>
<td>3P-7P</td>
<td>77%</td>
</tr>
<tr>
<td>7P-12M</td>
<td>58%</td>
</tr>
</tbody>
</table>

Source: RADAR 116 March 2013 (Monday-Sunday Weekly Cume Estimates)
Radio Listening Occurs When People Are Engaged In a Wide Variety of Life Activities

Percent of AM/FM Radio Listeners Engaged in Given Activities, Persons 25-54

- Traveling or commuting: 61%
- Talking or chatting: 59%
- Working: 31%
- Having a meal: 30%
- Drinking: 26%
- Housework or chores: 21%
- Socializing: 19%
- Shopping: 19%
- Personal grooming or dressing: 19%
- Relaxing: 15%
- Preparing food or cooking: 14%
- Snacking: 14%

Radio provides opportunities to reach consumers when advertising is relevant to what they are doing.

Source: 2012.2 MBI USA Touchpoints™
The Broadcast Radio Audience is Consistent Throughout the Week

Reach by Day of Week
Persons 25-54

Monday: 60%
Tuesday: 63%
Wednesday: 62%
Thursday: 63%
Friday: 64%
Saturday: 54%
Sunday: 48%

Source: 2012.2 MBI USA TouchPoints
Reaching Young Adults Year Round

Q1 2012: 94.2%
Q2 2012: 94.5%
Q3 2012: 93.9%
Q4 2012: 93.9%

Source: Arbitron PPM, Top 25 Metros, M-Su 6a-12Mid, Jan 2012 – Dec 2012, Weekly Cume Rating for Adults 18-49
AM/FM Radio Adds Considerable Reach When Used With Other Media

Average Day Reach, Persons 25-54

Source: MBI USA Touchpoints™ 2012.2
Reallocating 15% of Budget from TV Only to Add Radio Increases Campaign Metrics

Average Weekly Campaign Metrics % Improvement By Substituting Radio – All Three Campaign Metrics Increased In Every Case

Source: MBI USA TouchpointsTM 2012.2; results in each case study based on the specific target audience for that particular client; MBI TouchPoints measures the social-emotional context of target audiences’ lives to identify the moments of highest receptivity – something they identify as the Receptivity Potential Index
influence
Radio Has the Power of Persuasion

- 52% Their favorite Radio personality influences their opinion
- 51% Have considered or purchased a product/service advertised during their favorite Radio personality’s show
- 47% Have considered or purchased a product or service recommended by their favorite personality

"They are very down to earth people, just like their listeners"

Sources: USC, Annenberg School for Communication & Journalism, PSI Study released June 2012, Woodley, P. and Movius, L. People With a Favorite Radio Personality in Los Angeles
Ads on AM/FM Radio Prompt Consumer Response

% Who Have Ever Done the Following After Hearing an Ad on AM/FM Radio

- Visited advertised restaurant: 43%
- Visited advertised store: 41%
- Attended advertised event or performance: 40%
- Talked about the ad or product with others: 39%
- Watched advertised TV program: 38%
- Recommended advertised product to others: 28%
- Visited advertiser’s website: 28%
- Called the advertised product or store: 16%

Source: The Infinite Dial 2013 – Arbitron Inc./Edison Research
QUESTION:

On average, what percentage of the audience remains after a commercial break on the radio?

ANSWER:

93%
Radio Holds Its Audience Levels During Commercial Breaks

Percent of Lead-In Audience During Commercial Breaks

Source: Arbitron, Media Monitors and Coleman Insights “What Happens When the Spots Come On?” 2011
Across Ages and Gender
Tune-in Is High During Commercial Breaks

Radio’s Audience Delivery During an Average Minute of Commercial Breaks by Age/Gender

Source: Arbitron, Media Monitors and Coleman Insights “What Happens When the Spots Come On?” 2011
Radio Influences and Builds Brands

**Six Study Average % Lift:**
Radio-Targeted Consumers vs. Control Groups

- Awareness $\rightarrow$ + 13%
- Consideration $\rightarrow$ + 20%
- Purchase Intent $\rightarrow$ + 14%
- Affinity / Likeability $\rightarrow$ + 38%
- Advocacy $\rightarrow$ + 37%

Refreshing the World: Coca-Cola and Radio

- Radio is great for building connections with consumers and helping create shared, meaningful experiences at a local level.

- Being local is important for Coca-Cola because of the need to support their network of more than 70 bottlers who produce and sell their products in communities across the U.S.

- Consumer passion points differ city by city, so building programs with radio helps us tailor our connections via targeted experiences and enables us to make those connections very local and very relevant to the consumer.

Beatriz “Bea” R. Perez
Chief Sustainability Officer & Former Chief Marketing Officer,
The Coca-Cola Company

Source: Arbitron 2011 Deeper Dive
U.S. Marines Partner with Radio to Create Effective Campaigns

“Radio speaks to our core demo in a very personal way. When we started significantly integrating radio advertising and events into our recruiting efforts, we immediately recognized success. Since then, the strategy has spread and been implemented with other recruiting command area.”

Sgt. Paul A. Robbins Jr.
U.S. Marine Corps Orlando recruiting station,
6th Marine Corps Recruiting District

Source: Arbitron 2011 Deeper Dive; Photo courtesy of the U.S. Marine Corp
Fiesta Feasts on Radio

• Ford was ready to launch the “Fiesta Movement” in the U.S.

• In an effort to secure **100,000 test drives in less than 8 months**, Ford turned to radio. Prior to Fords launch day, carefully selected radio personalities met with Ford Fiesta product specialists for first hand experiences. Highlights from each DJ’s experience were captured on video and posted on the radio station’s website.

• On Monday of each launch week, **Ford Fiesta owned all ad messaging that ran within a pre-designated prime time hour**. Additionally, DJ “brand ambassadors” created 2-minute conversational spots about the car.

• In every market stations identified **local events** that offered on-site display opportunities for the Fiesta. DJ’s and Ford product specialists set up interactive games and product displays enhancing the consumer experience.

• On select days listeners were given clues to the location of a “marked” Ford Fiesta. The listener who spotted the “marked” car and approached the driver, were rewarded with gift cards.

• **Results**

  Above and beyond the millions of impressions delivered on-air, Ford received an **in-person** audience of over 500,000 consumers in less than 100 days. Nationwide, Fords highest performing dealers were in the markets utilizing this unique radio plan to generate leads, test drives and sales.

Source: Katz Media Solutions Case Studies
Six Flags Sees ROI with Radio

• Based on 2009 and 2010 plans, radio drove an average ROI increase of 28%
• 2011 Fright Fest campaign was radio only
  • Included radio station websites, email clubs, and social media
  • A “record” Fright Fest with attendance, event revenue and season pass sales
• New ride launch trials – audio and video
  • Radio hosts and listeners are invited to give it a try
  • Experience is videotaped, lands on Facebook pages and station websites creating on-air chatter

“Listeners follow [radio hosts] and want to know what they have to say. We’re trying to tap into that and leverage it because that’s still one of radio’s strengths. That hasn’t changed.”

James Geiser
Six Flag’s Corporate Vice President of Marketing

Source: Arbitron 2012 Deeper Dive
for additional information.....

www.arbitron.com
www.katz-media.com/ourcompanies/RA/Pages/main.aspx
www.rab.com
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www.raisingthevolume.com
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Catch Parts One and Three…

Radio Delivers Massive Reach In Real Time

Radio Engages and Influences Listeners

Digital Technology Enables Expansion and Interaction

For a copy of the presentation visit www.arbitron.com/radiotoday

Let’s compare media in your market using Scarborough Research…