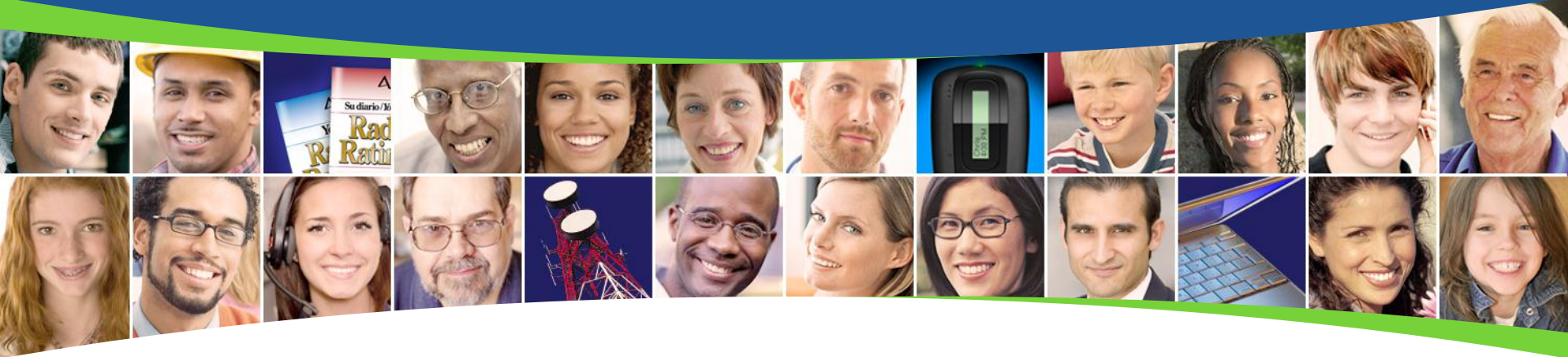


# Where Radio Fits Radio's Strengths in the Media Landscape



**Bill Rose**

Senior Vice President of Marketing  
Arbitron Inc.

September 21, 2012



# Arbitron Initiatives to Help Make the Case for Radio

## Training



Radio landscape presentations developed in partnership with Katz and the RAB

## Outreach



Testimonials from advertiser champions of radio

## Industry Studies

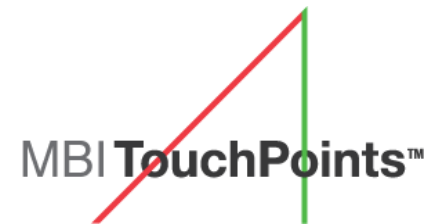


Research studies to help make the case for radio

# USA TouchPoints



- » Rich multidimensional study of consumers' daily lives
- » Captures media usage, shopping behavior, and emotional mindset from a single sample
- » National probability sample of 2,000 persons aged 18-64
- » Nested within GfK/MRI's Survey of the American Consumer enabling a foundation for fusing other data sources

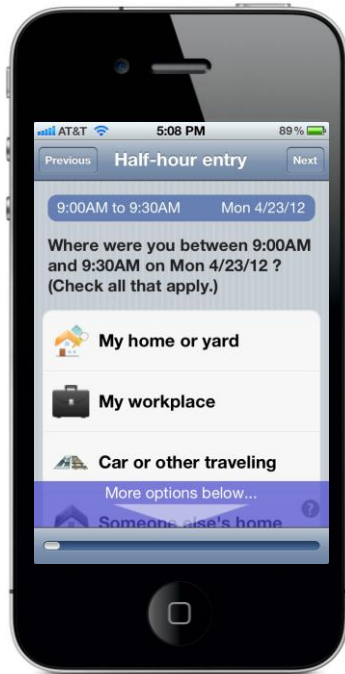


**Create value for advertisers, agencies, and the media through greatly enhanced advertising ROI**

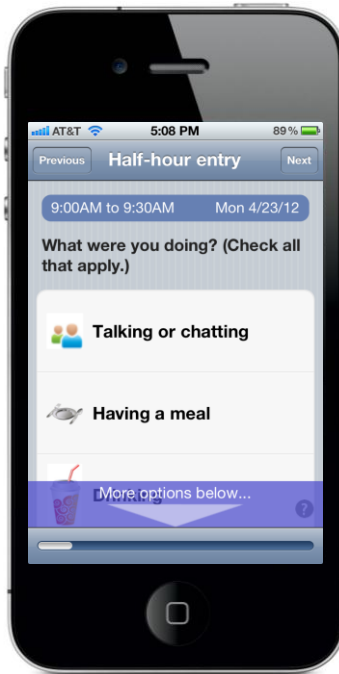
# TouchPoints Uses an App to Collect a Variety of Consumer Data

MBI TouchPoints™

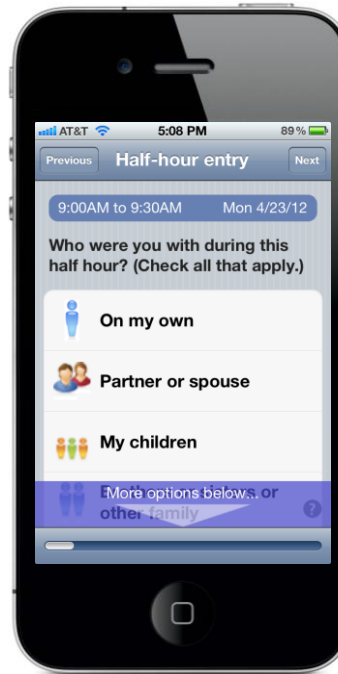
## Location



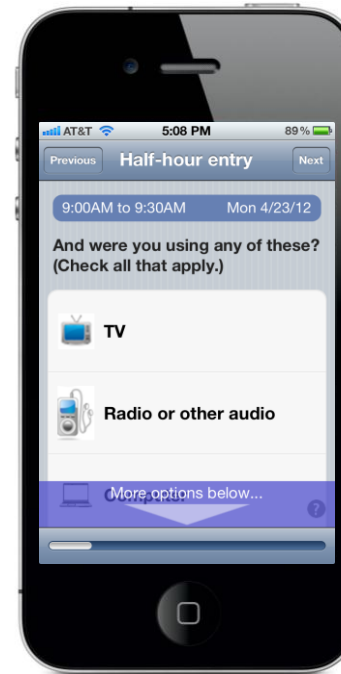
## Activities



## Social Setting



## Media



## Mood/Emotion



# 2,000 People, 20,000 Days, 480,000 Hours of American Life



**20**  
**Locations**



**23**  
**Activities**



**8**  
**Mega Media**  
**Categories**



Happy

**17**  
**Emotional**  
**Mindsets**



**10**  
**Social**  
**Settings**



**33**  
**Internet**  
**Site Types**

MBI TouchPoints™





# Headlines: AM/FM Radio Delivers

- » Consistently big audiences, especially during the day when most shopping occurs
- » “The last word” for advertisers reaching the most consumers right before they shop
- » Enhanced reach when combined with other media
- » An ad environment relevant to where consumers are going and what they are doing
- » A highly engaged, attentive, and positively minded audience
- » A variety of decision influencers

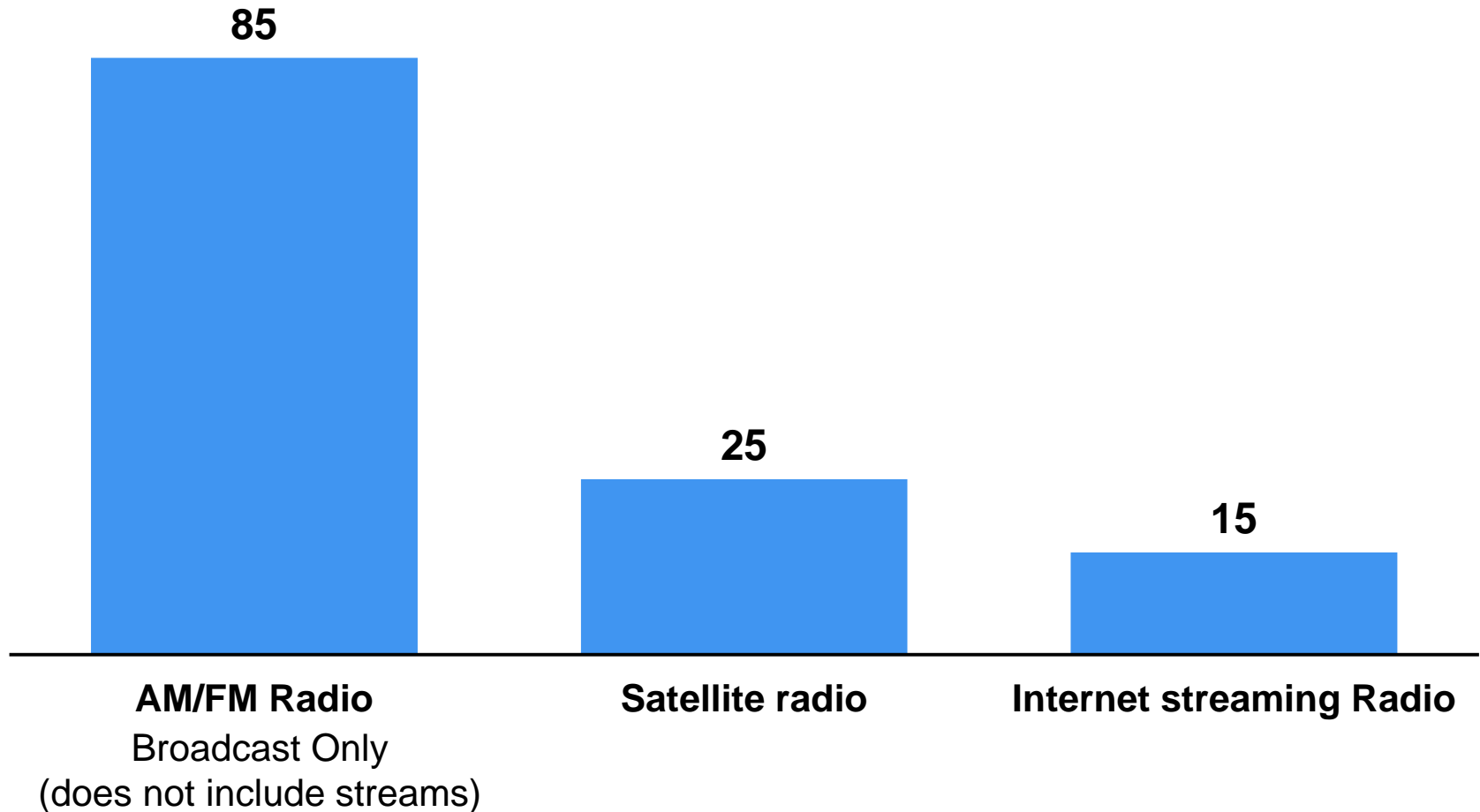


MBI TouchPoints Part I

# **A Look at AM/FM Radio Overview – Persons 25-54**

# AM/FM Radio Remains the Most Dominant Audio Platform

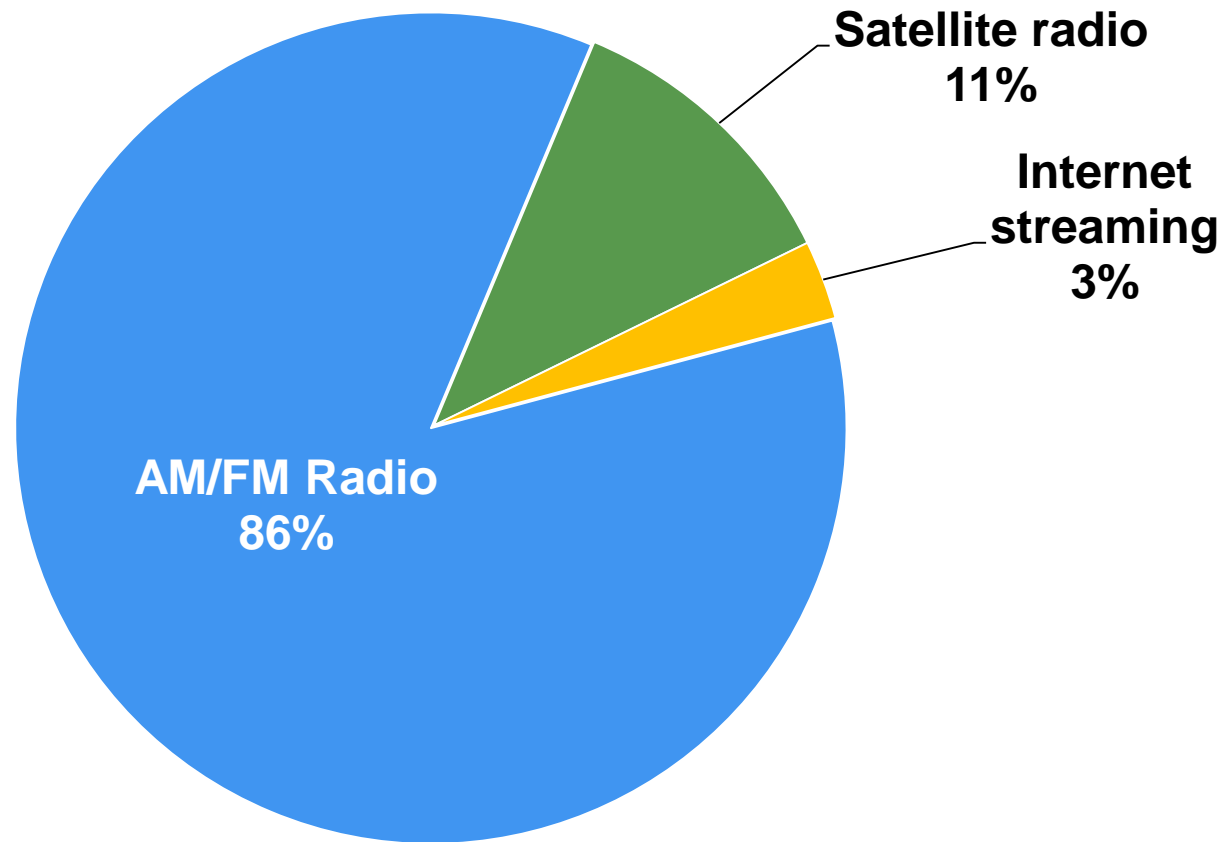
Percent Reached During the Week, Persons 25-54





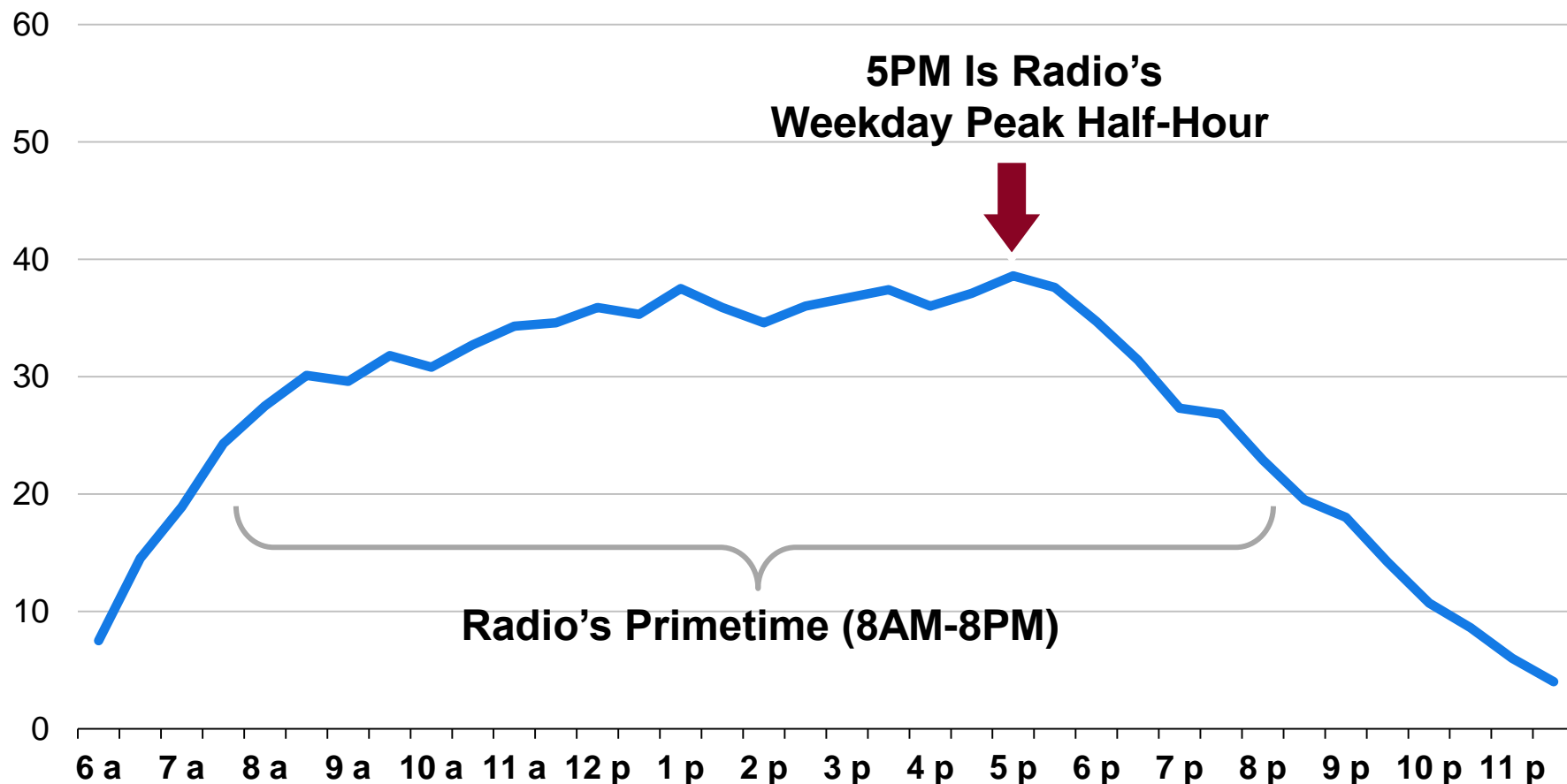
# Consumers Spend Far More Time With AM/FM Radio Than Other Audio Platforms

Percent of Aggregate Time Spent With Audio, Persons 25-54



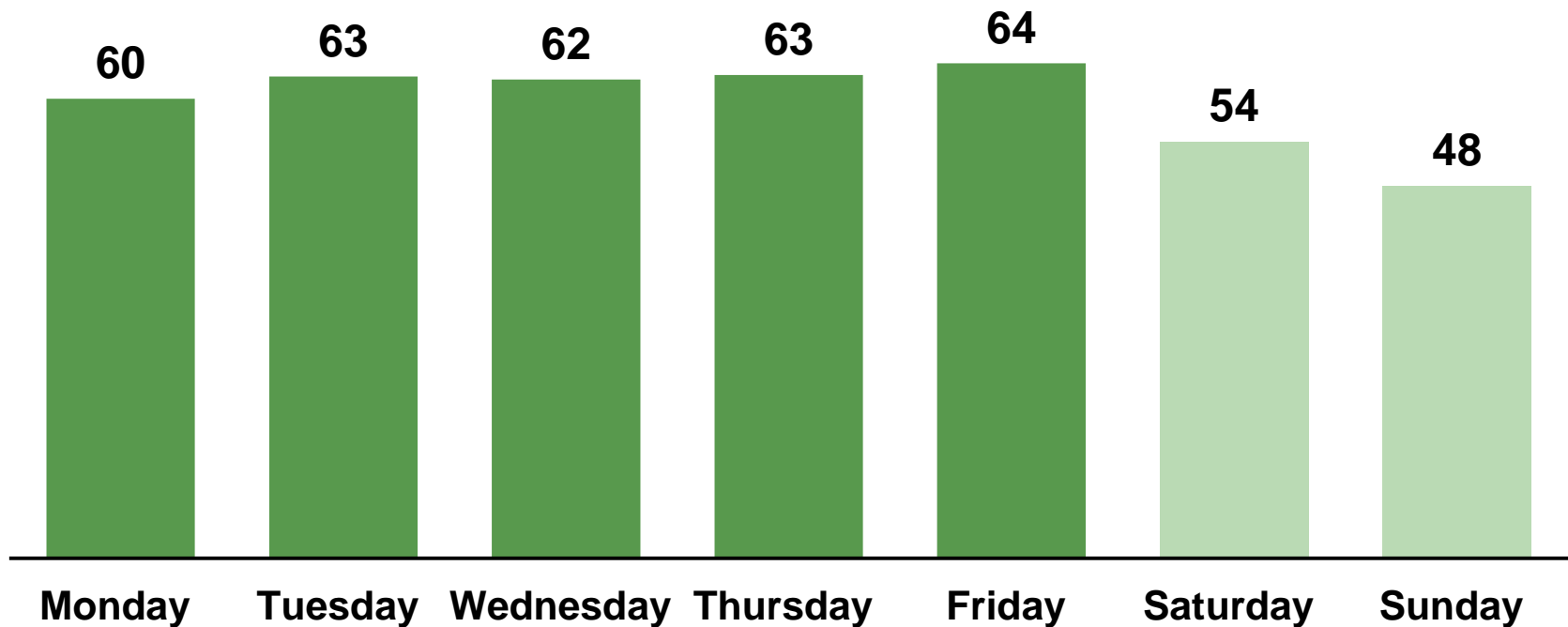
# Daytime Is AM/FM Radio's "Primetime"

Reach During the Work Week by Half Hour, Persons 25-54



# The AM/FM Radio Audience Is Consistent Throughout the Week

Reach by Day of Week, Persons 25-54

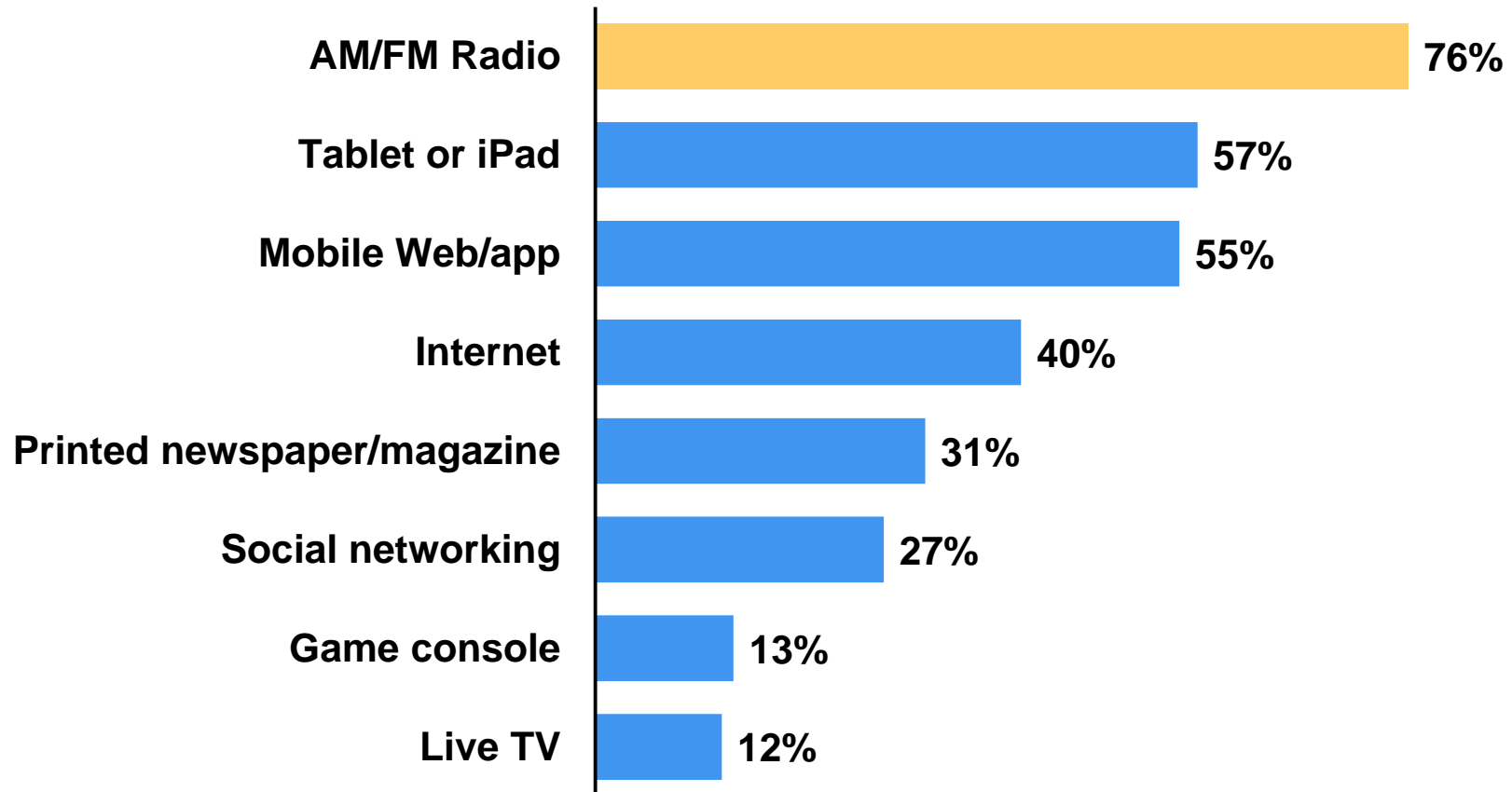


# MBI TouchPoints Radio Analysis Part II

## **Life Context of AM/FM Radio Listening**

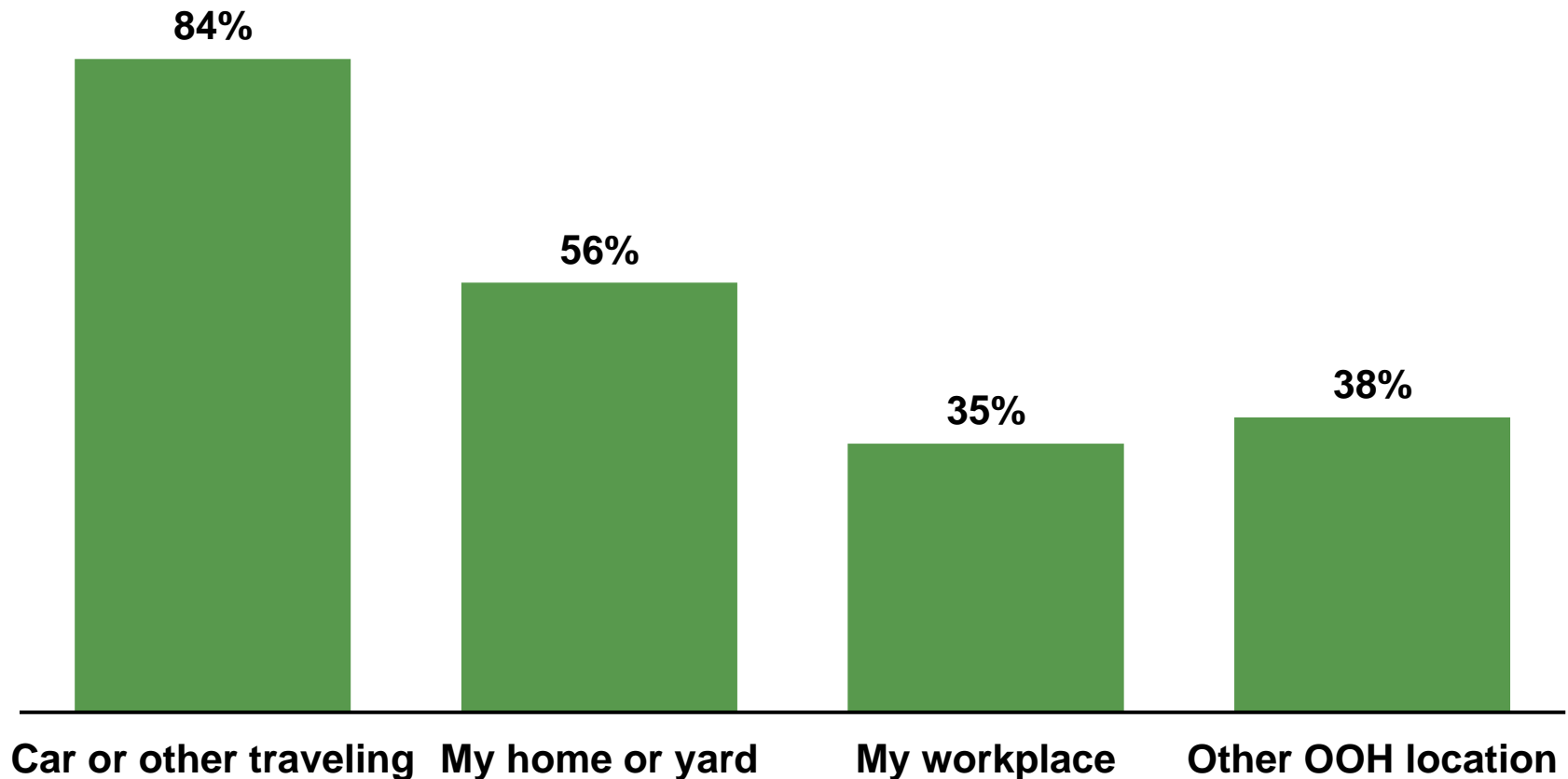
# More AM/FM Radio Usage Is Consumed Out of Home Than Other Major Media

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



# AM/FM Radio Is Used Most Away From Home During Weekdays

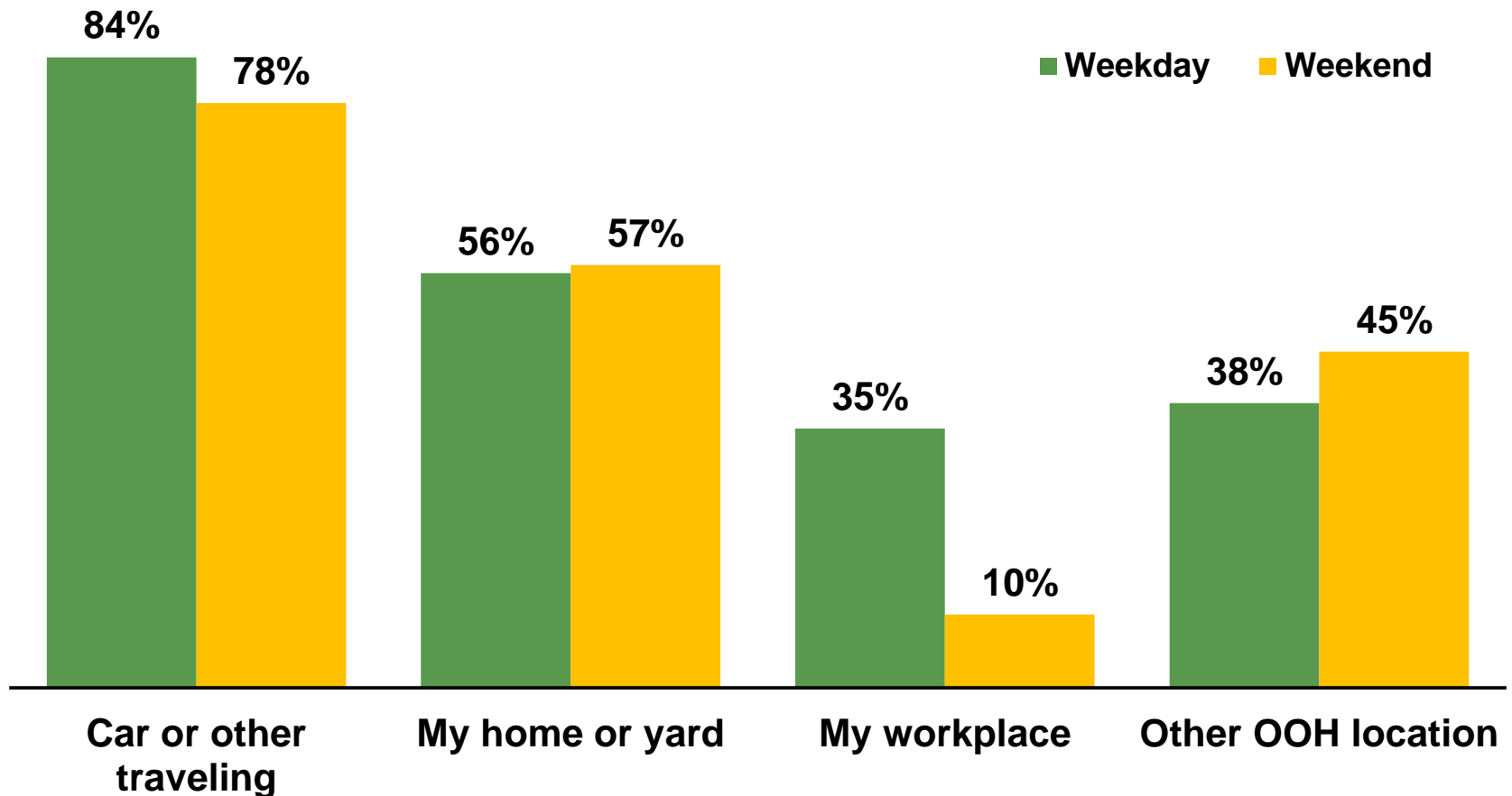
Percent of AM/FM Radio Weekday Listening By Location, Persons 25-54





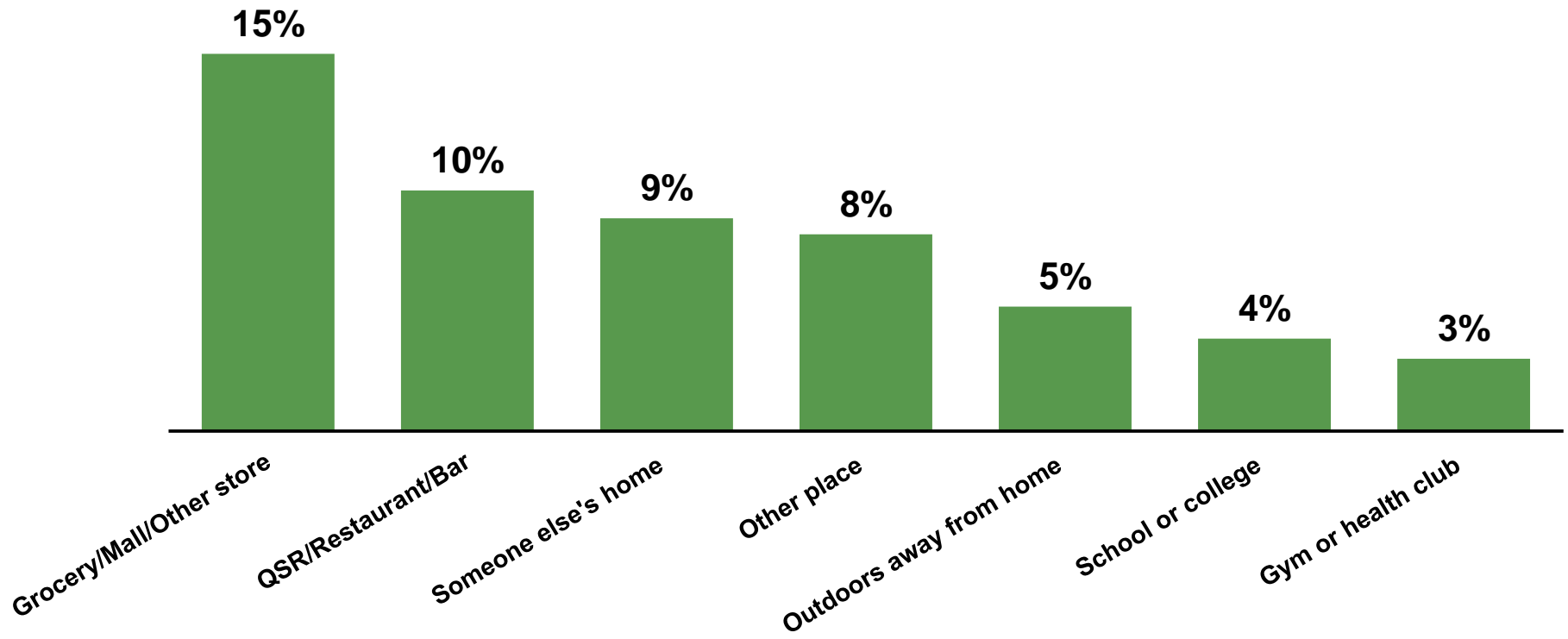
# Out-of-Home Use Rises During the Weekend for AM/FM Radio

Percent of AM/FM Radio Listening by Location, Persons 25-54



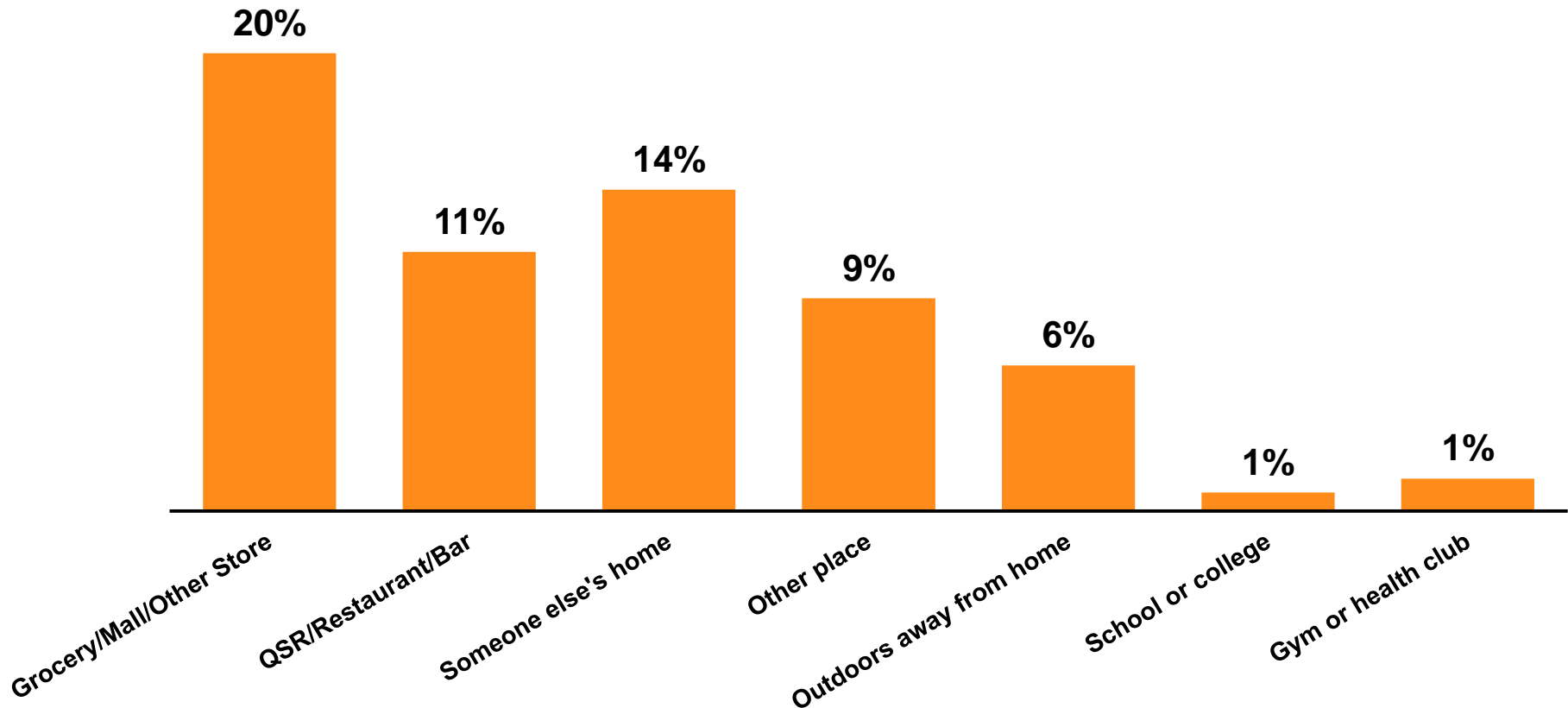
# Retail Locations Account for 15% of AM/FM Radio Listening During Weekdays

Percent of AM/FM Radio Weekday Listening by Location, Persons 25-54



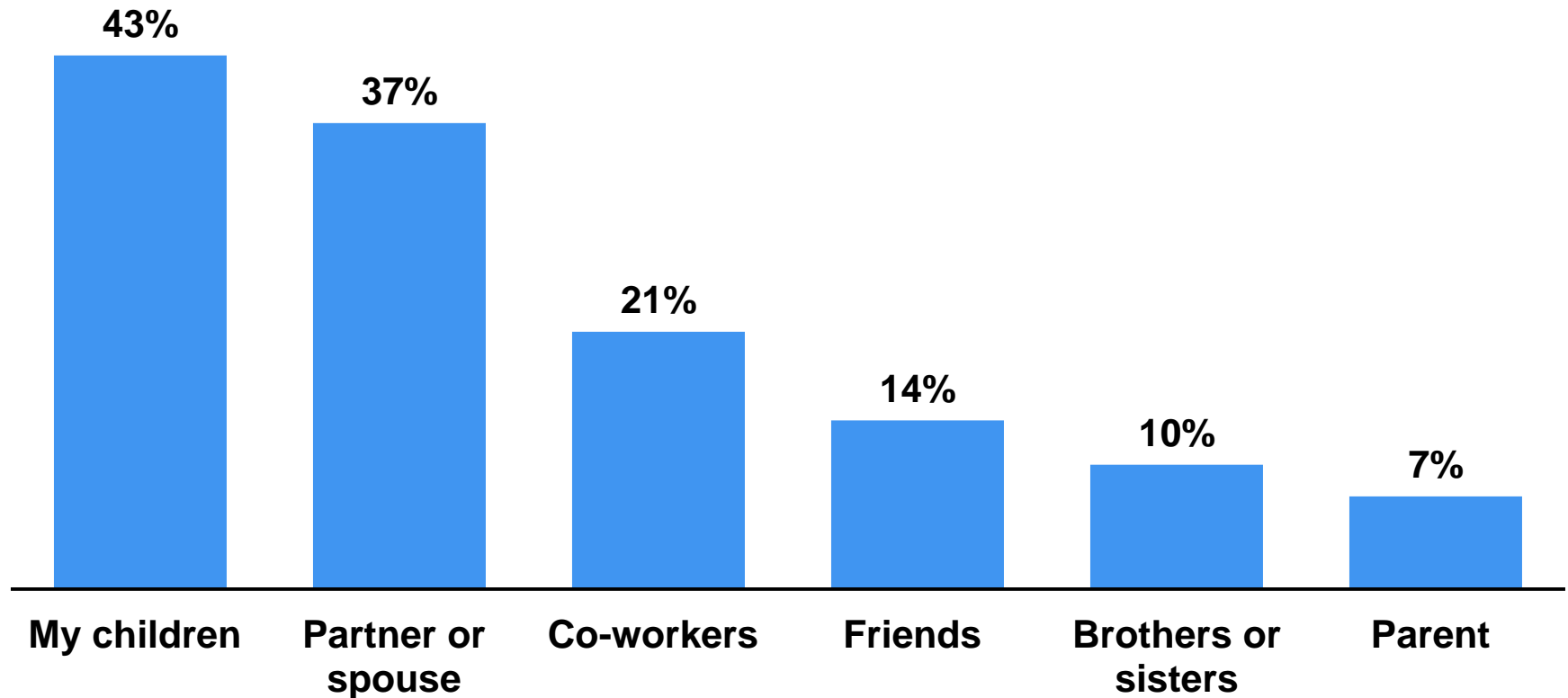
# Retail Locations Account for Nearly 20% of AM/FM Radio Listening During Weekends

Percent of AM/FM Radio Weekend Listening by Location, Persons 25-54



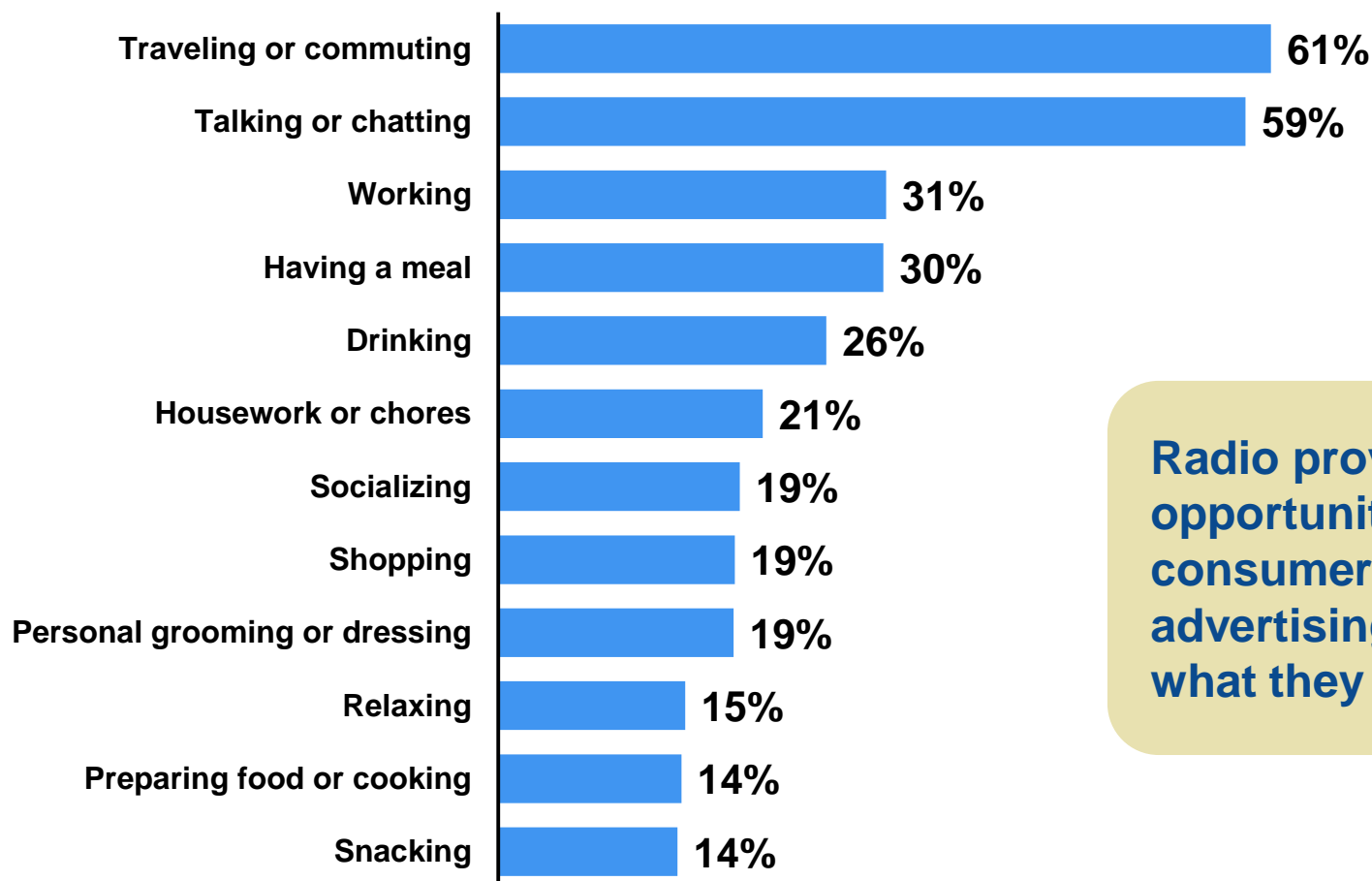
# AM/FM Radio Is Heard by a Variety of Decision Influencers

Percent of AM/FM Radio Audience Occurring with Others, Persons 25-54



# 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



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

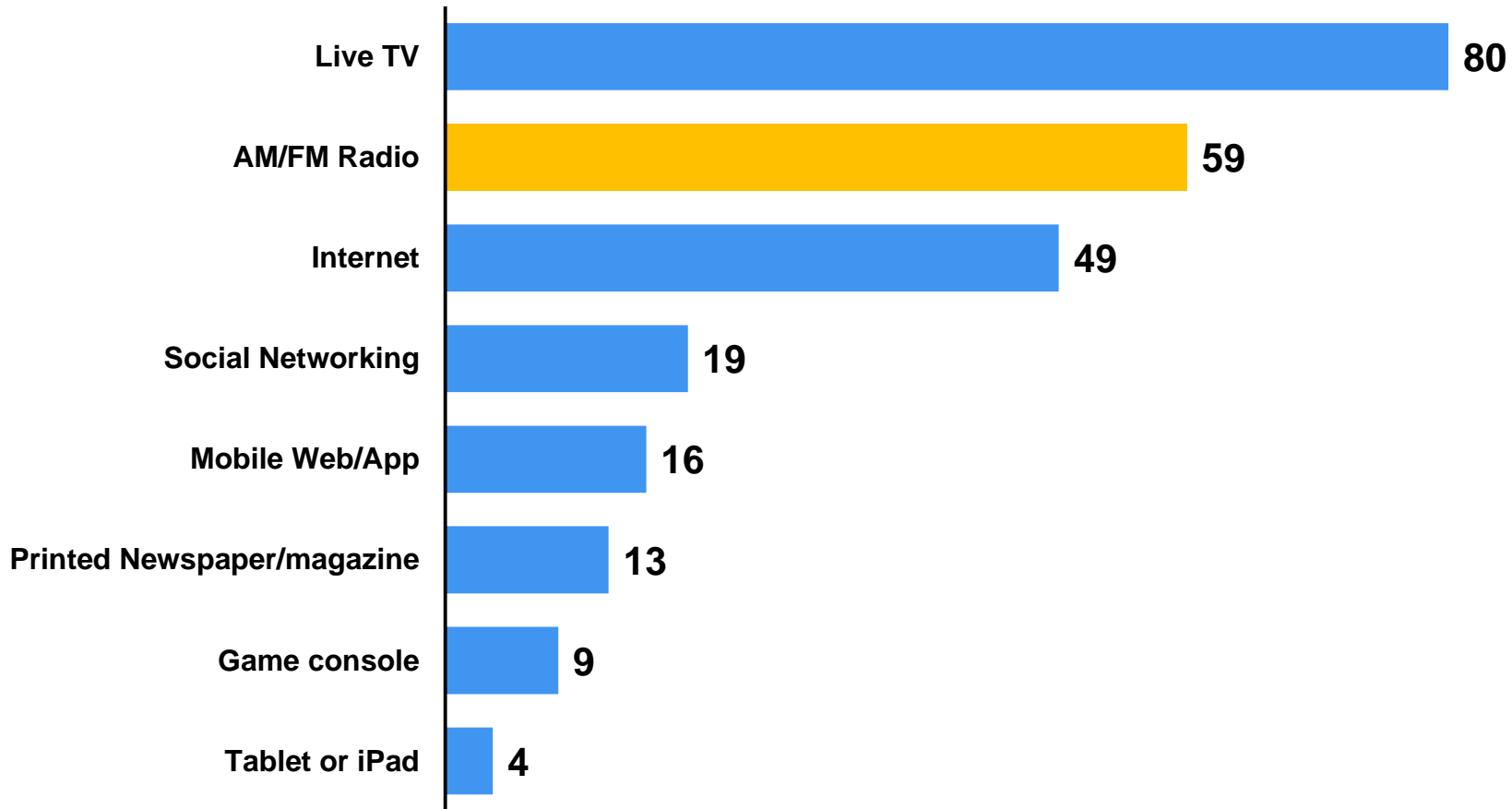
MBI TouchPoints Radio Analysis Part III

# **How AM/FM Radio Stacks Up to Other Media Channels**



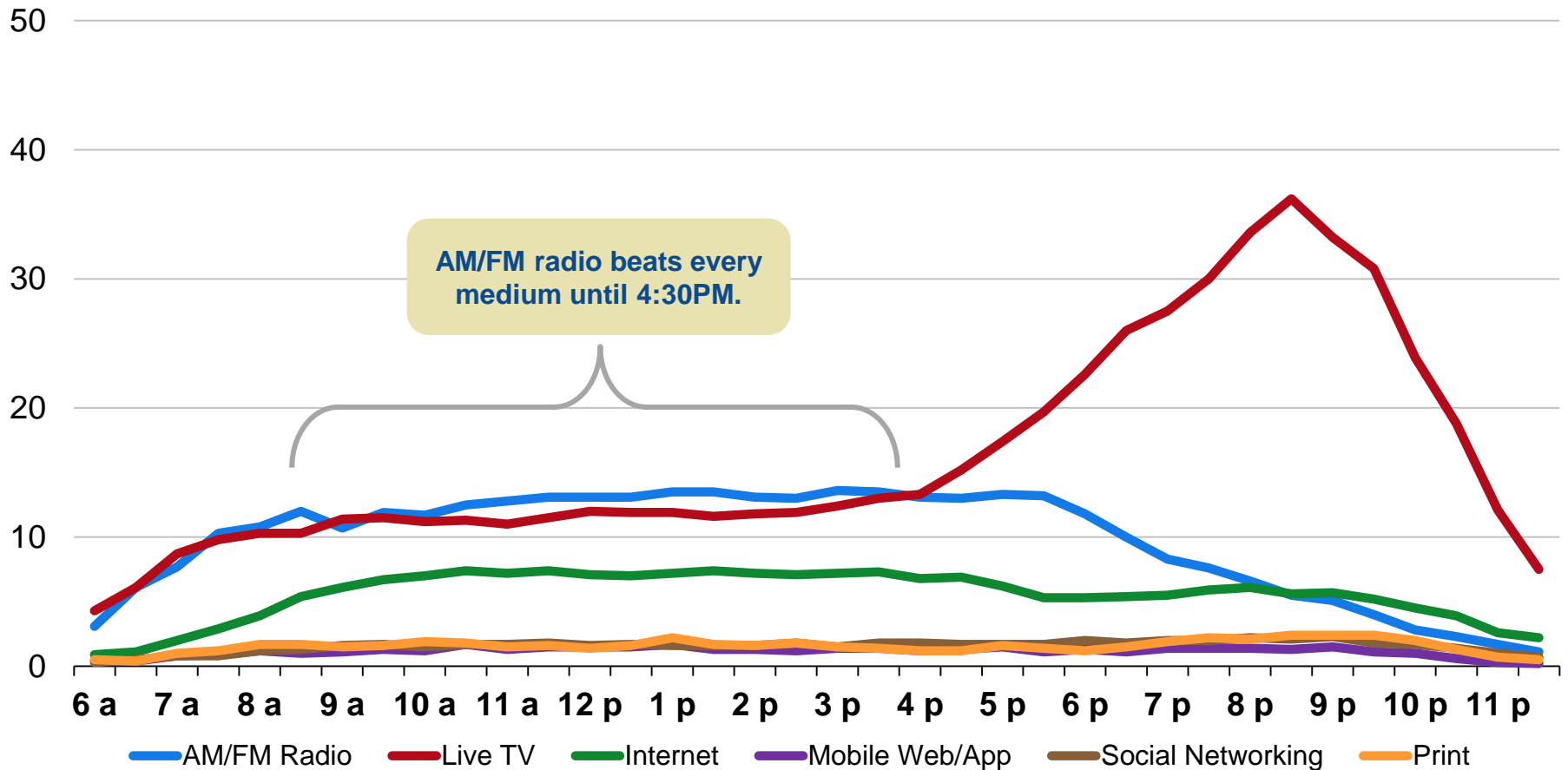
# AM/FM Radio Is the Second Most Widely Consumed Medium

Average Day Reach During the Week, Persons 25-54



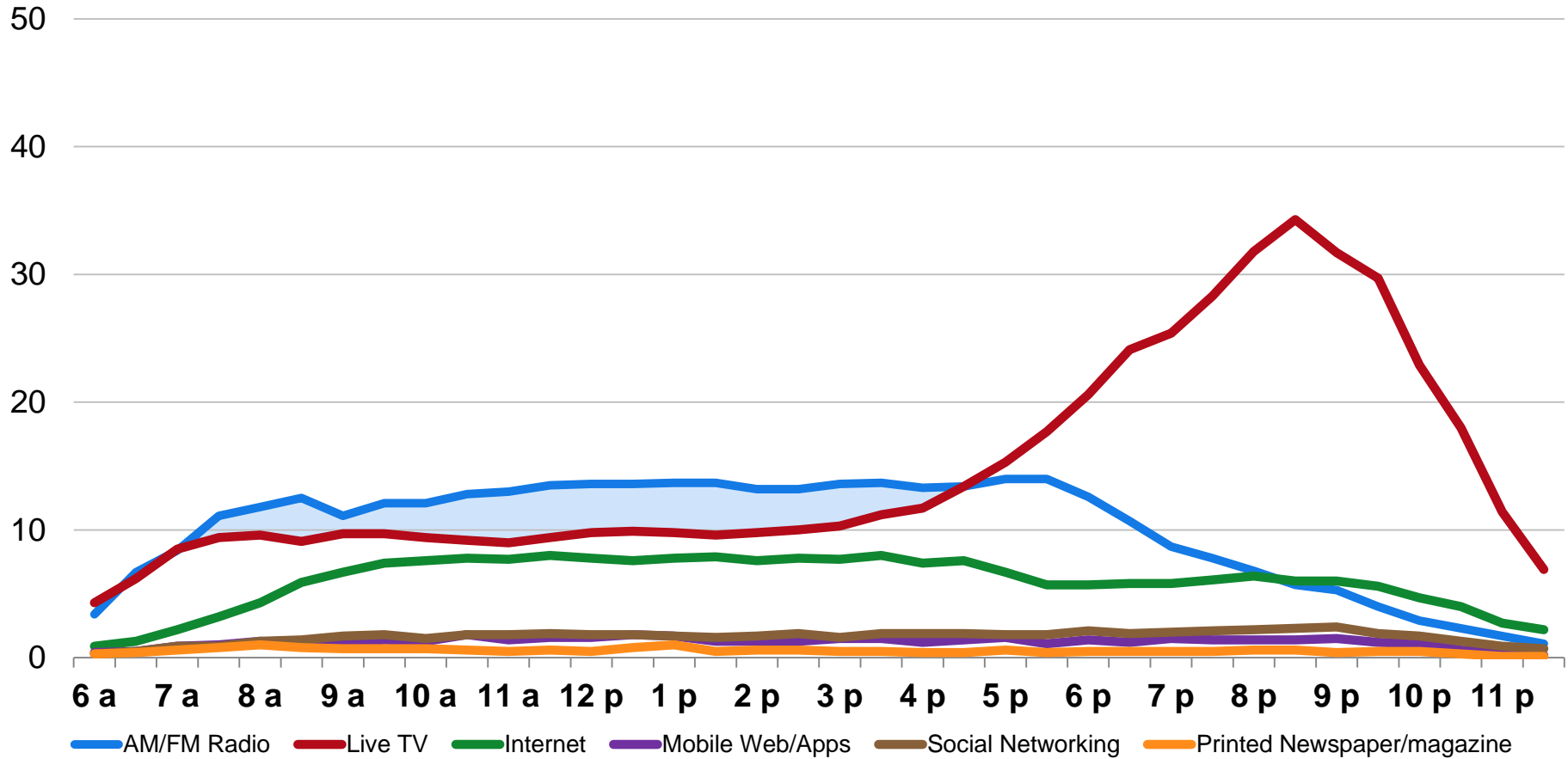
# AM/FM Radio Leads Other Media During the Daytime Monday-Friday

Average Day Reach by Half-Hour During Weekdays, Persons 25-54



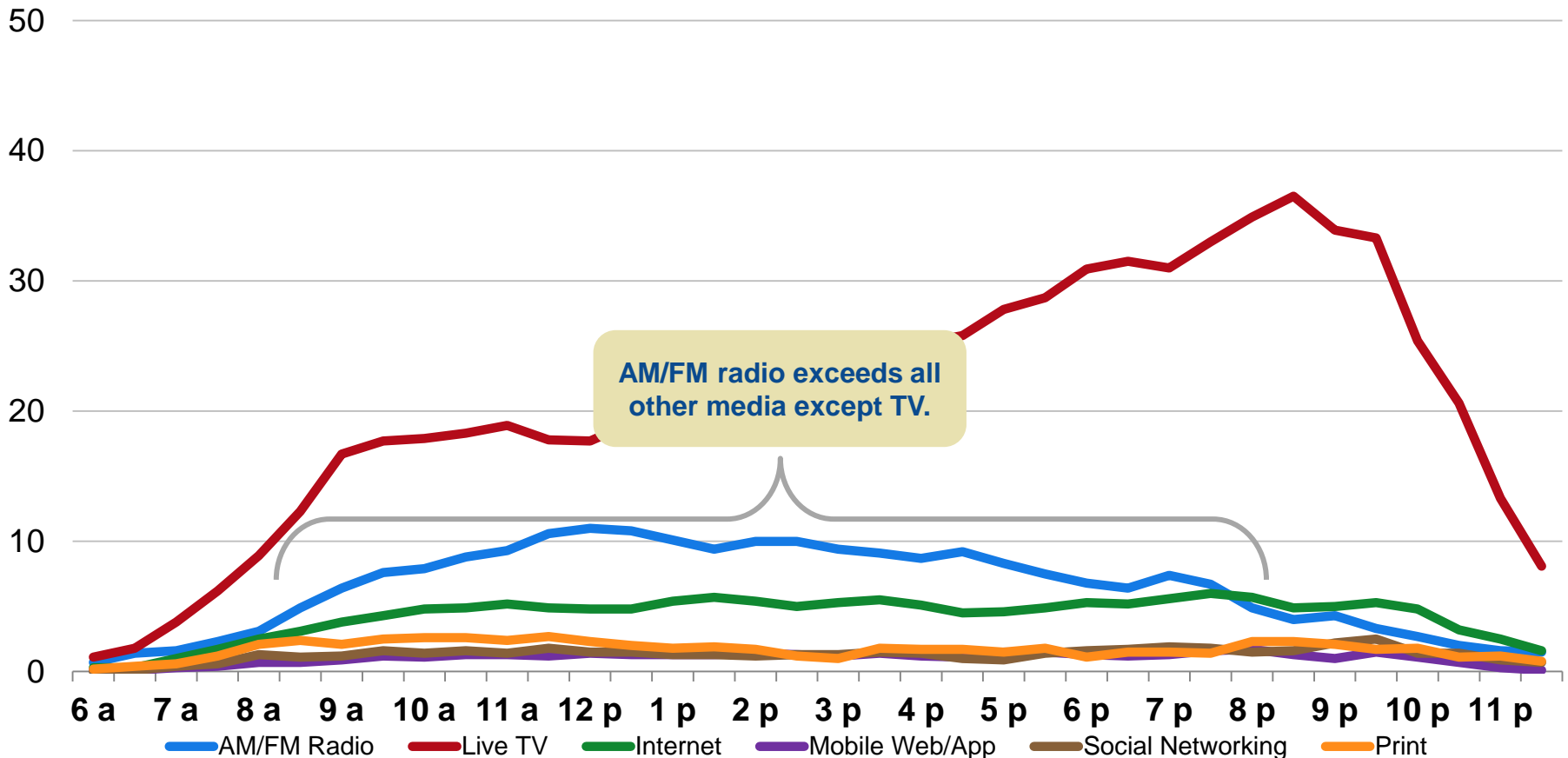
# AM/FM Radio's Daytime Lead Expands Among Employed 25-54s During Weekdays

Average Day Reach by Half-Hour During Weekdays, Employed Persons 25-54



# AM/FM Radio Is Stronger Than All Other Media Except TV During Weekends

Average Day Reach by Half-Hour During Weekends, Persons 25-54

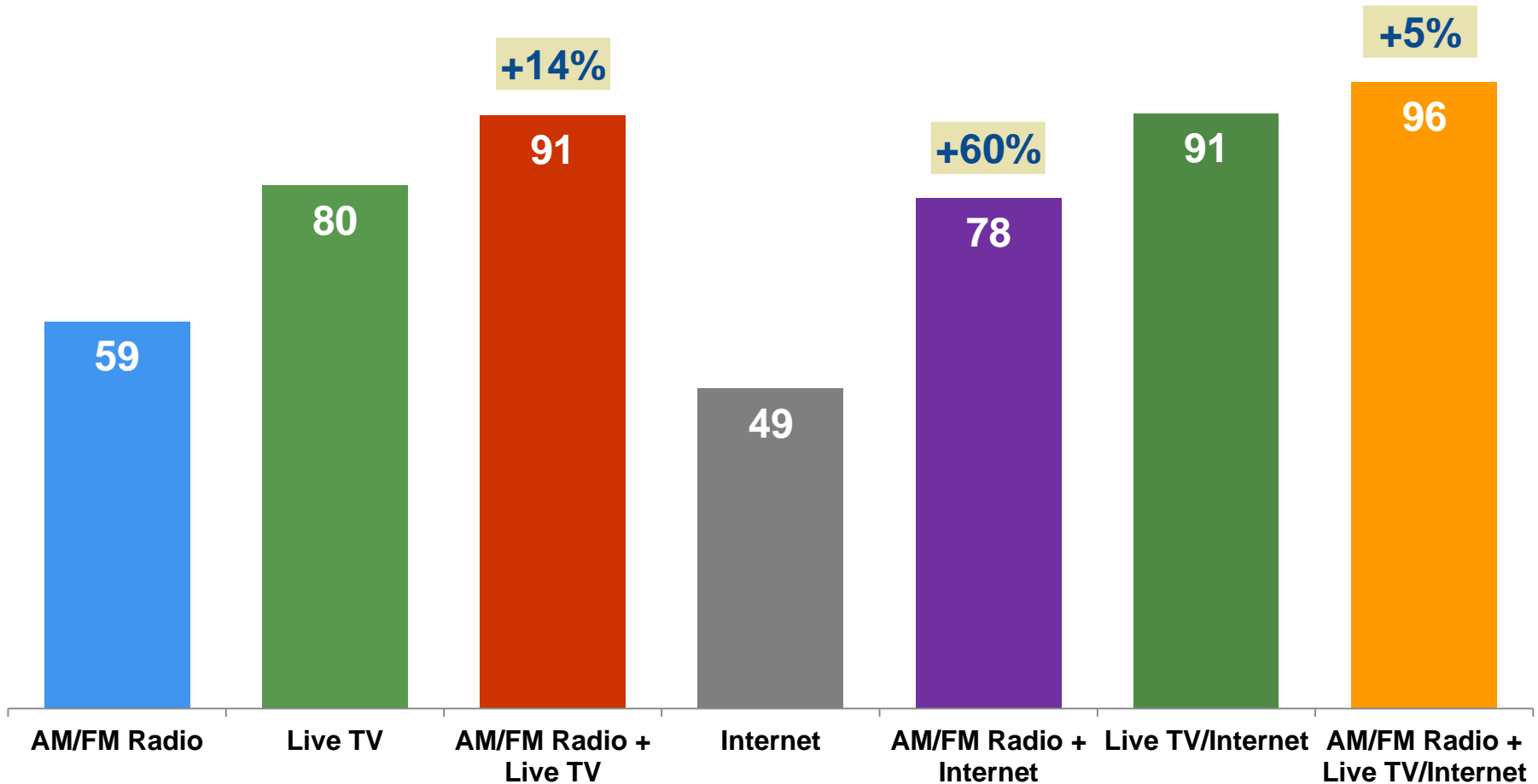


# MBI TouchPoints Radio Analysis Part IV

## **AM/FM Radio Boosts Other Media Channels**

# AM/FM Radio Adds Considerable Reach When Used in Combination With Other Media

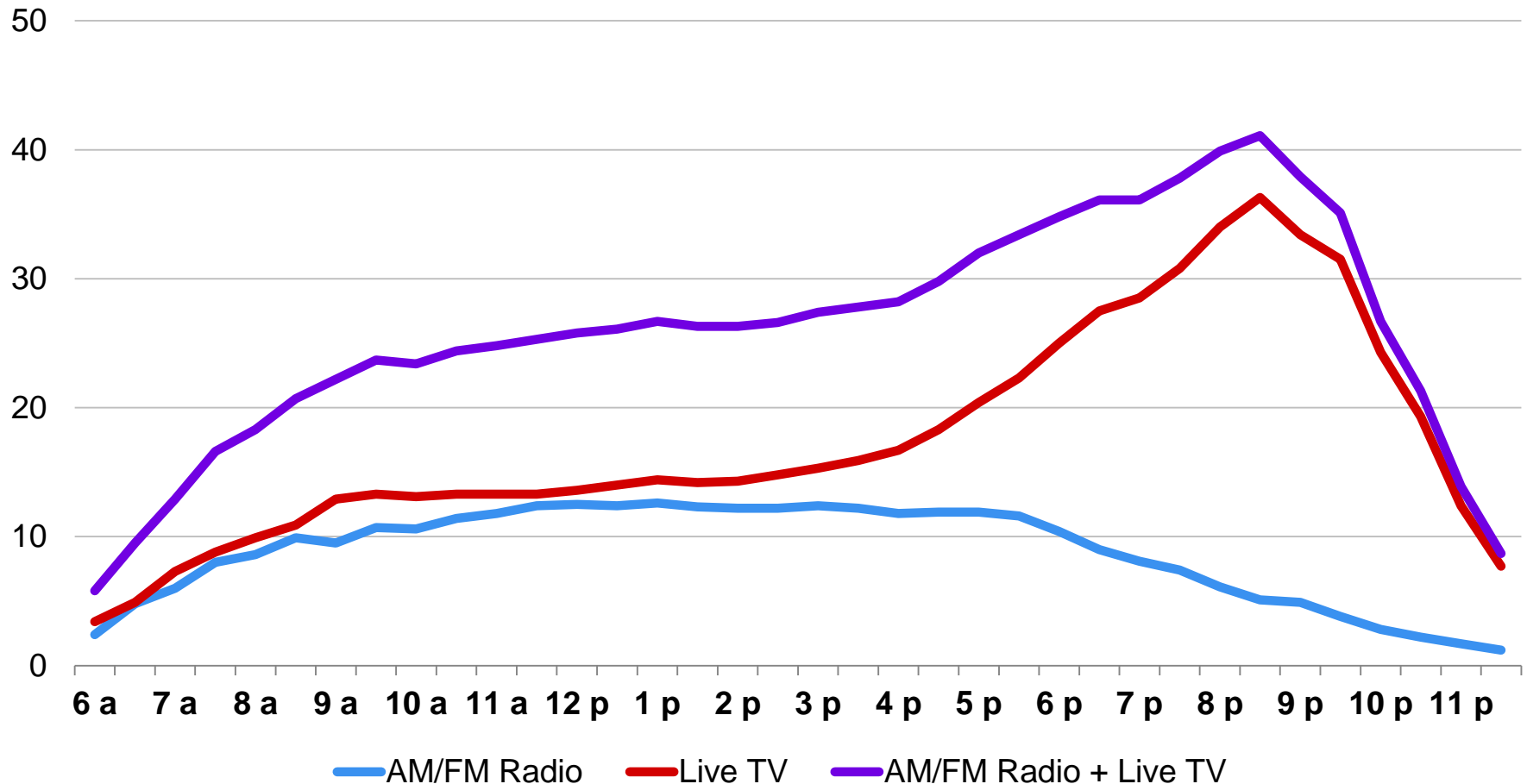
Average Day Reach by Media Combinations, Persons 25-54





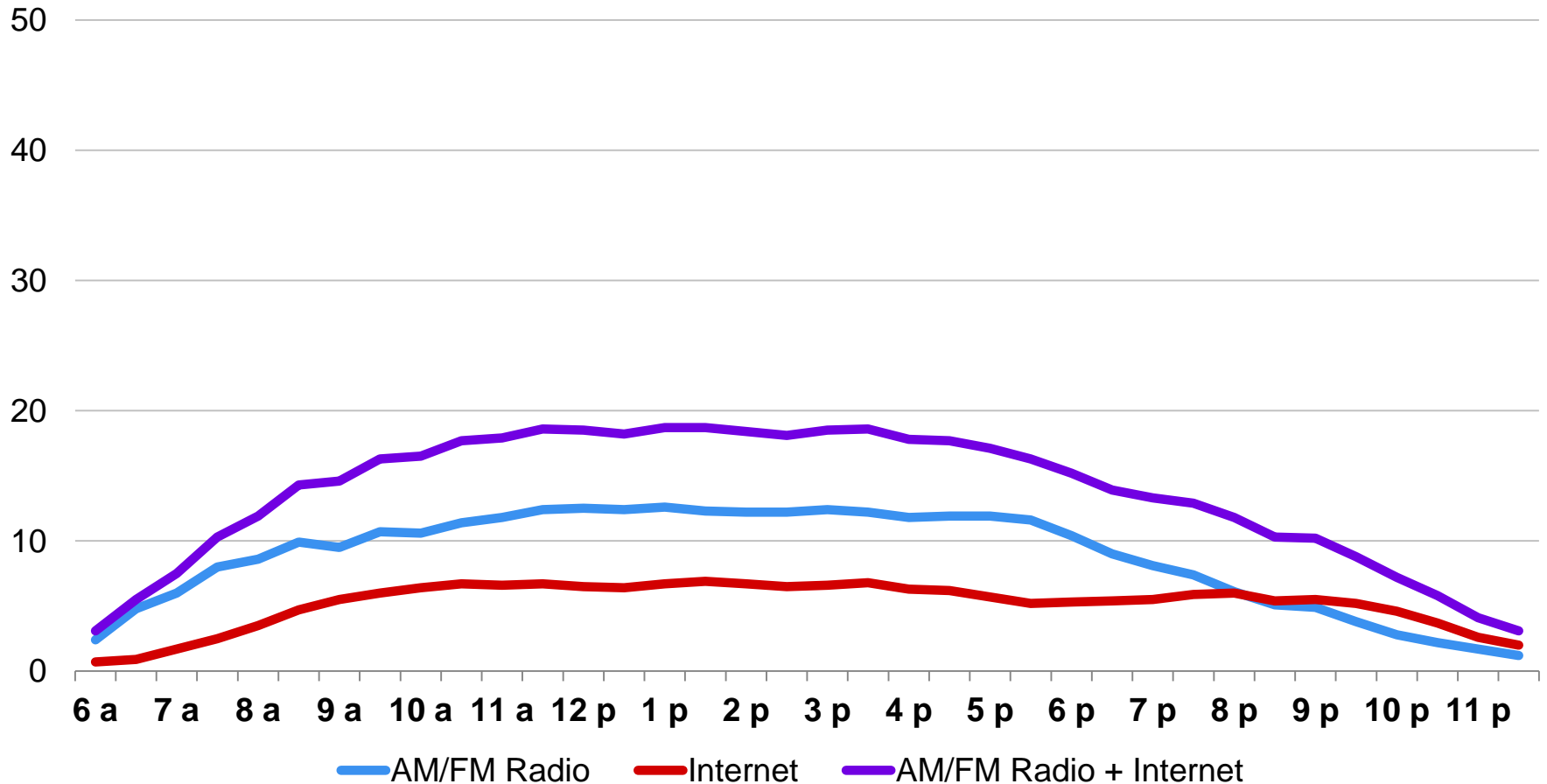
# AM/FM Radio in Combination With TV Boosts the Reach of Both Media Throughout the Day

Average Day Reach, AM/FM Radio + TV by Time of Day, Persons 25-54



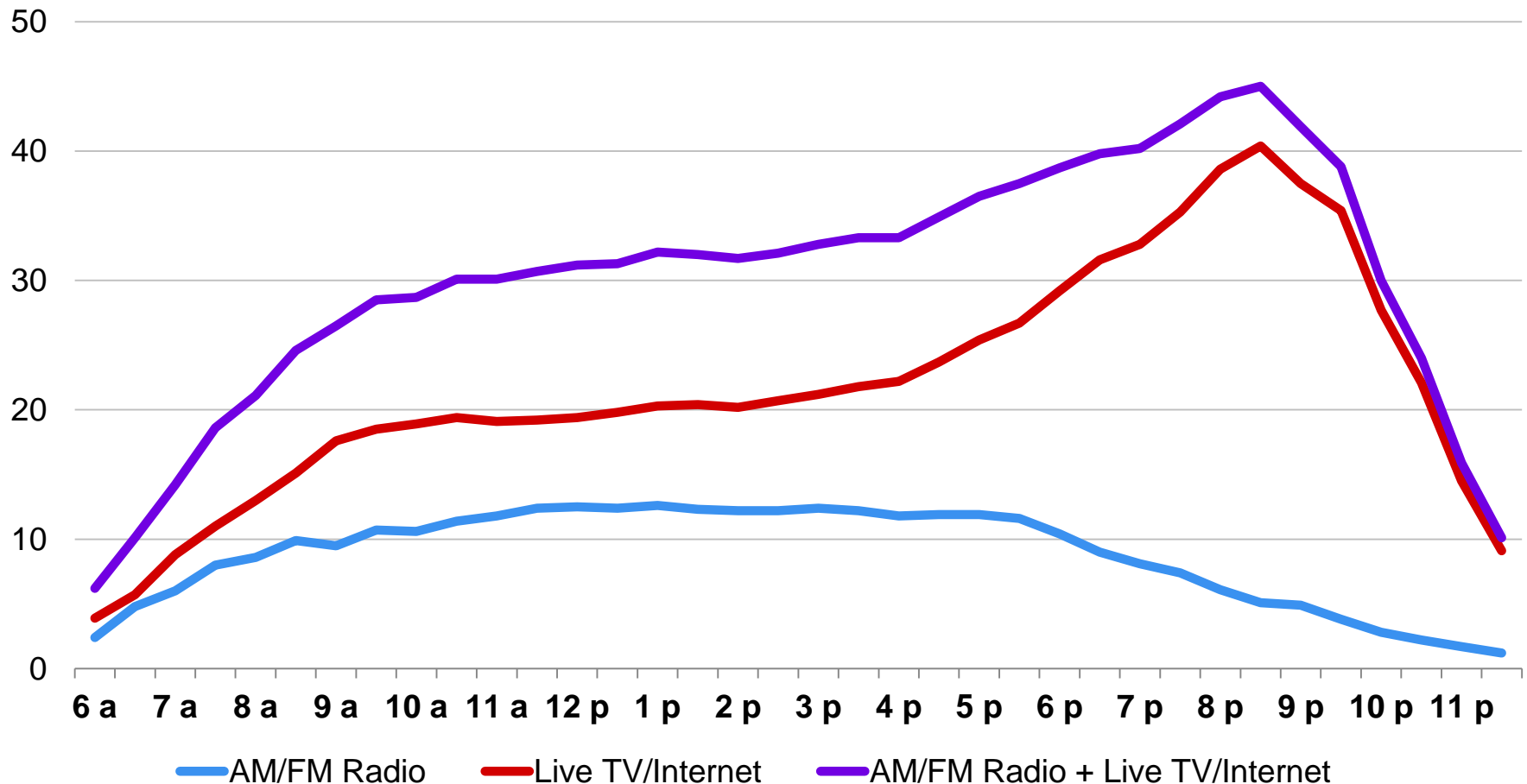
# AM/FM Radio Increases Reach When Used Together With the Internet

Average Day Reach, AM/FM Radio + Internet by Time of Day, Persons 25-54



# The Combination of AM/FM Radio With TV and Internet Raises Reach Significantly

Average Day Reach, AM/FM Radio + Internet + TV by Time of Day, Persons 25-54



MBI TouchPoints Radio Analysis Part V

# **Emotional Context of AM/FM Radio Consumption**

# AM/FM Radio Equals TV In Delivering Adults Who Are Feeling Positive

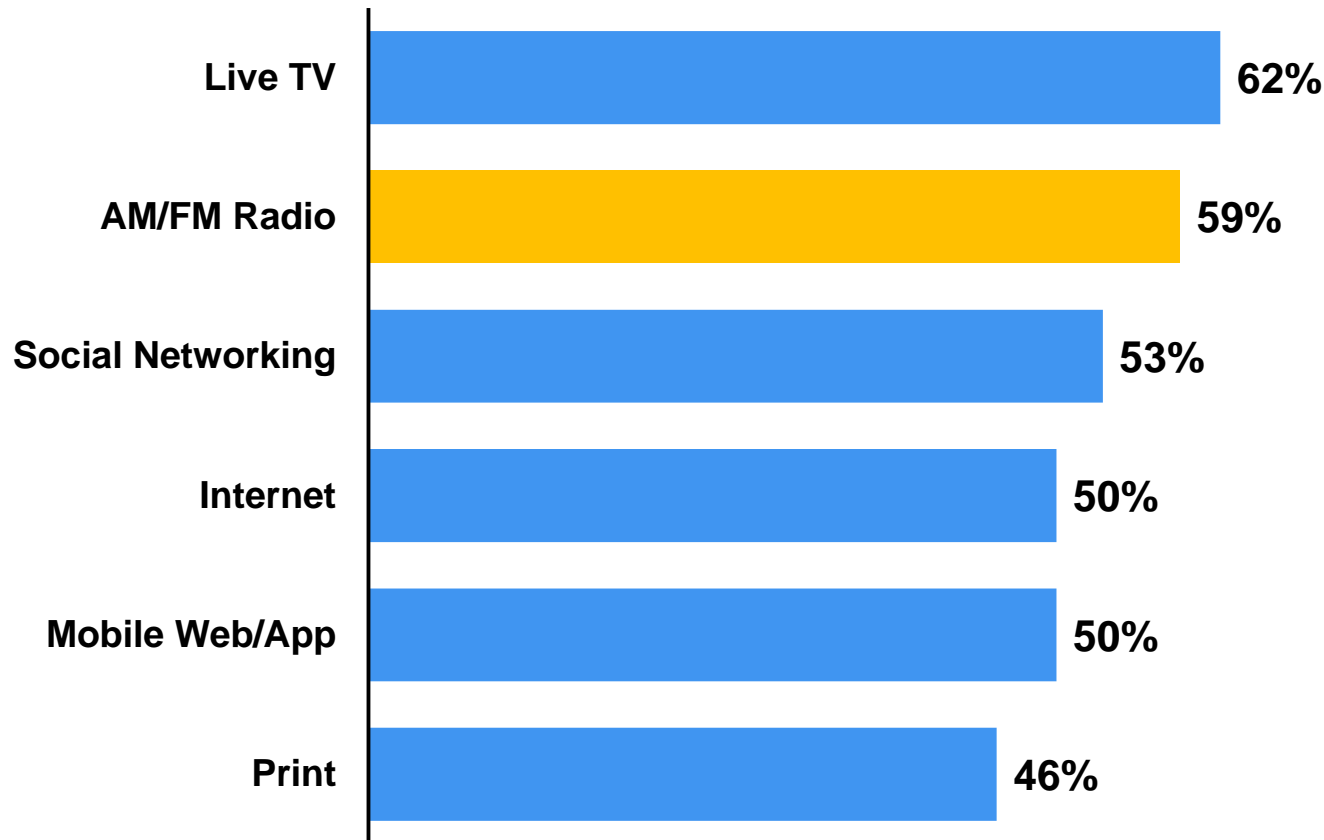
Percent of Audience Feeling Positive\*, Persons 25-54



\* Positive emotion includes confident, excited, happy, hopeful, interested, loving, or relieved.

# Six in Ten AM/FM Radio Listeners Feel Happy

Percent of Audience Happy, Persons 25-54

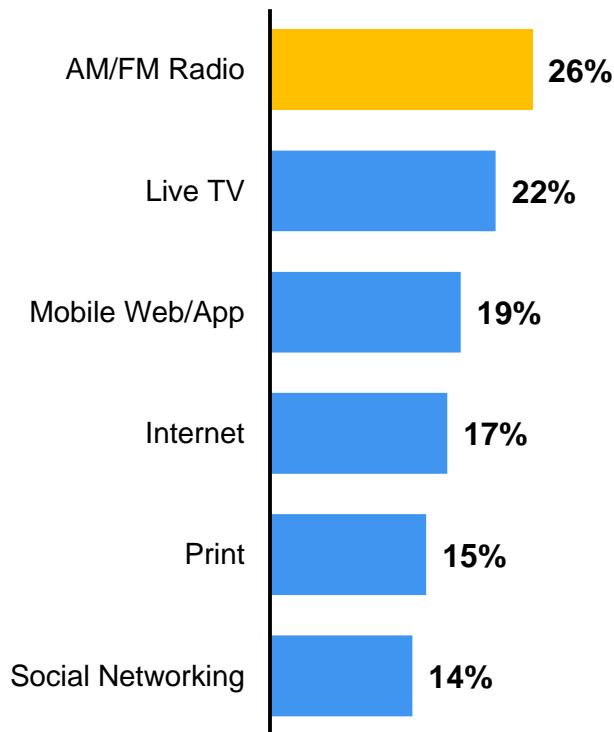




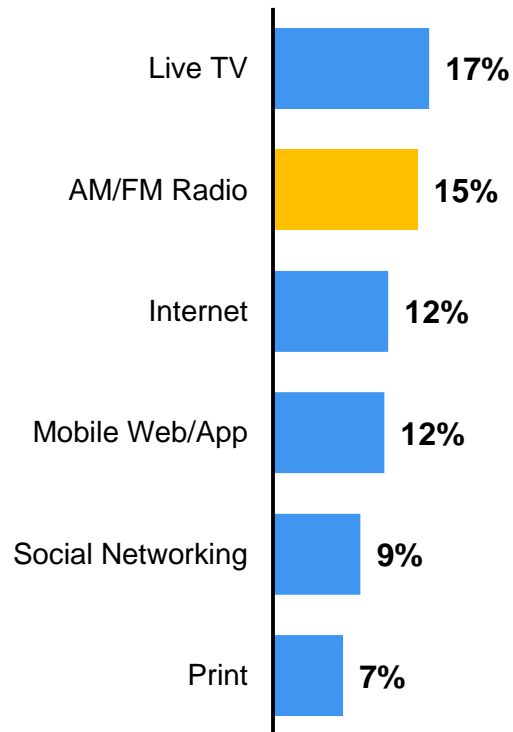
# A High Percentage of the AM/FM Radio Audience Feels Confident, Excited, or Hopeful

Percent of Audience Confident, Excited, or Hopeful, Persons 25-54

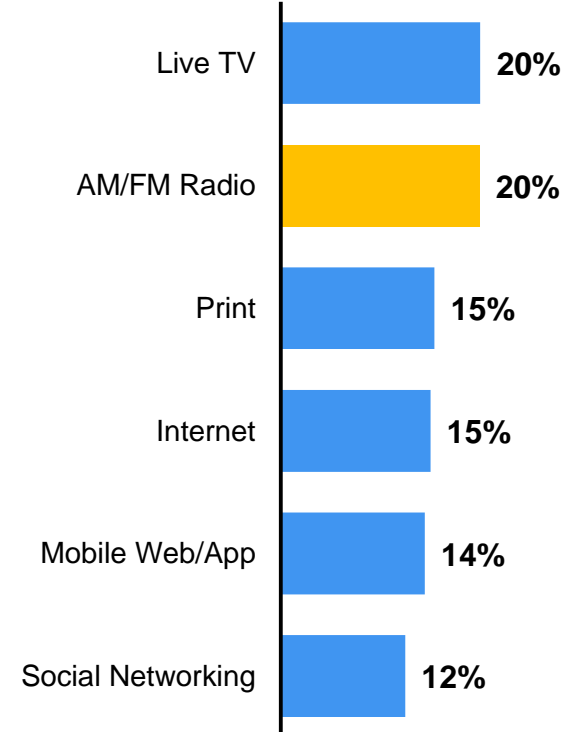
% of Audience Confident



% of Audience Excited

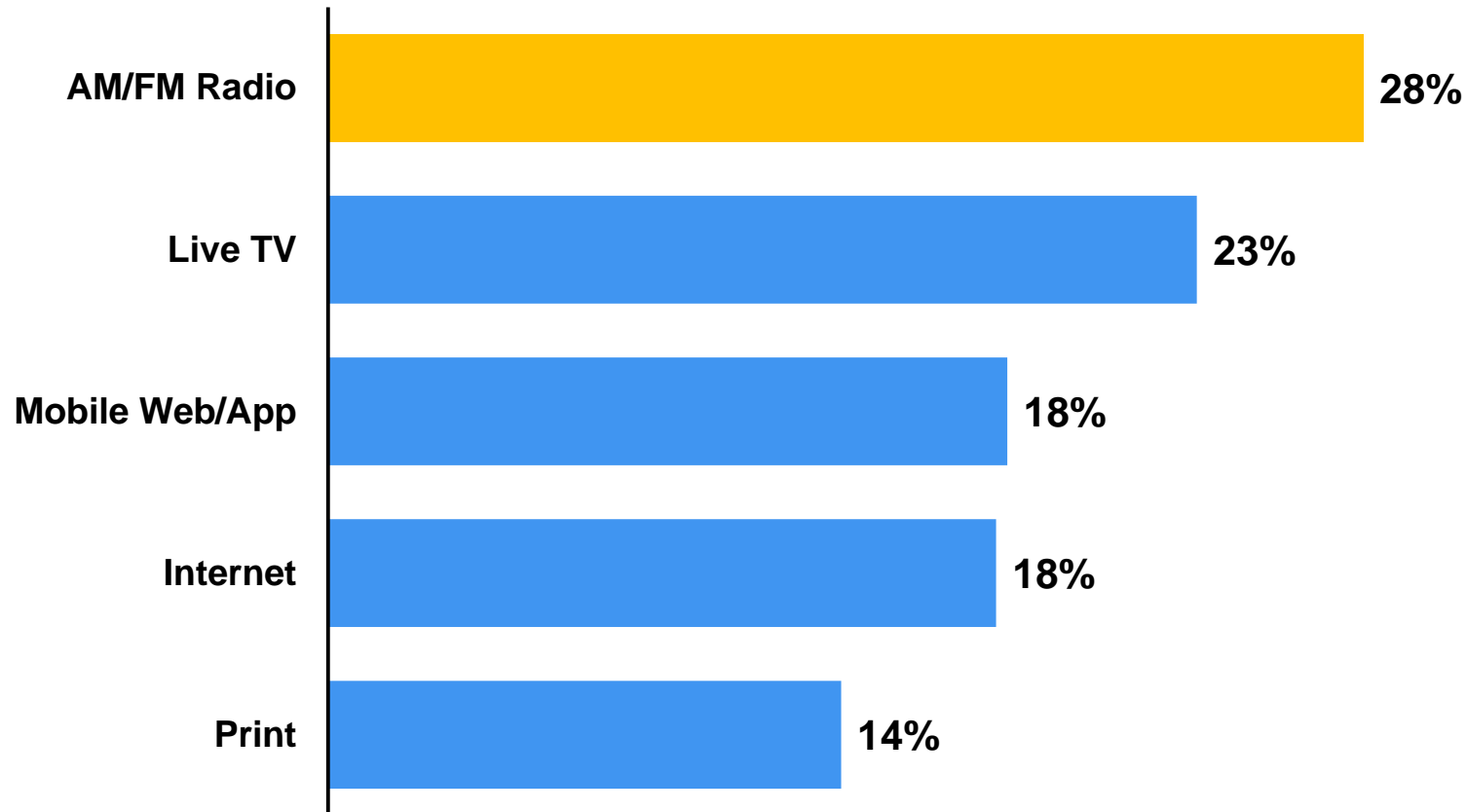


% of Audience Hopeful



# AM/FM Radio Listeners Feel the Most Alert Suggesting a Higher Level of Attentiveness

Percent of Audience That Feels Alert, Persons 25-54



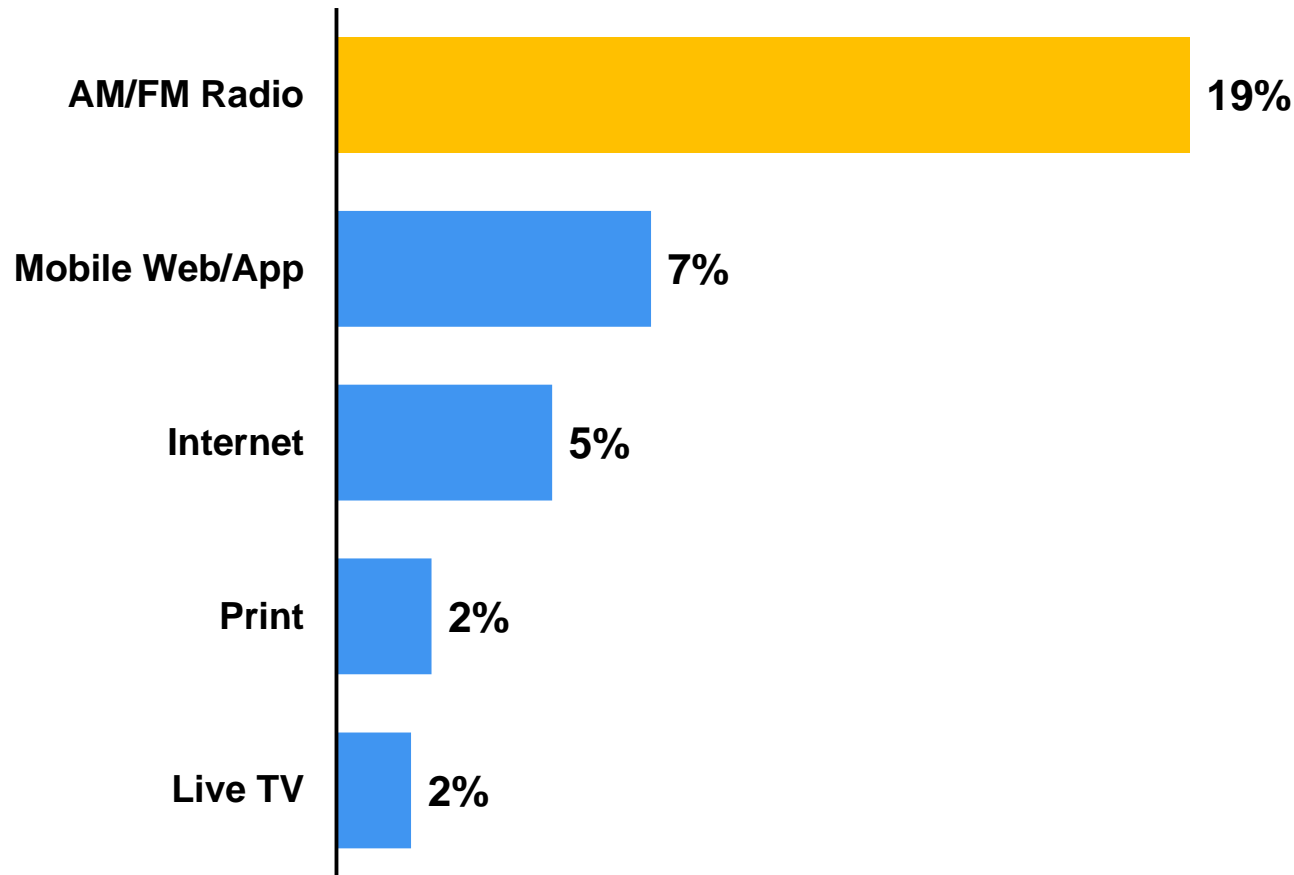
# MBI TouchPoints Radio Analysis Part VI

## **Recency Effect:**

## **Radio Gets The Last Word**

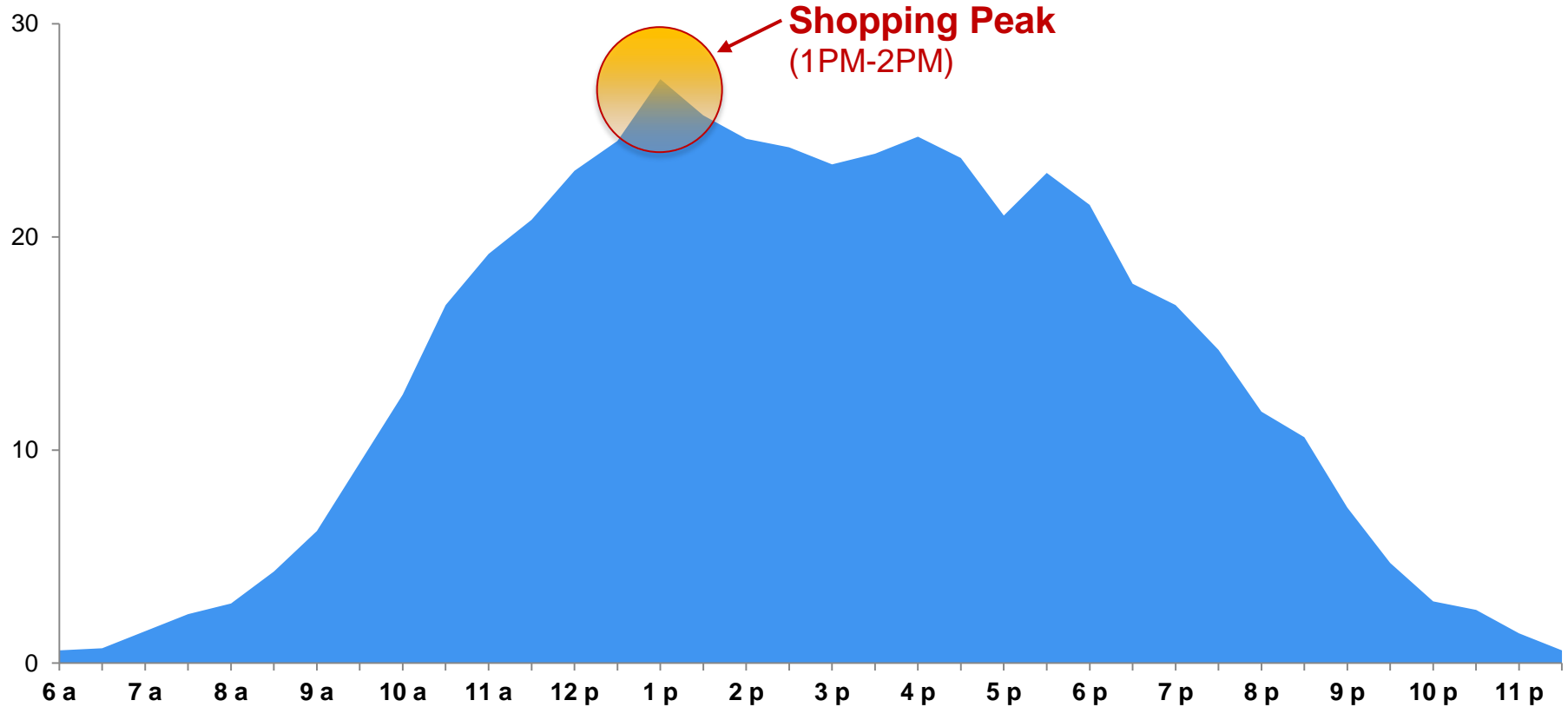
# AM/FM Radio Offers the Greatest Media Proximity to Shopping Occasions

Percent Exposed to Given Media Within the Half-Hour That Shopping Occurs, Persons 25-54



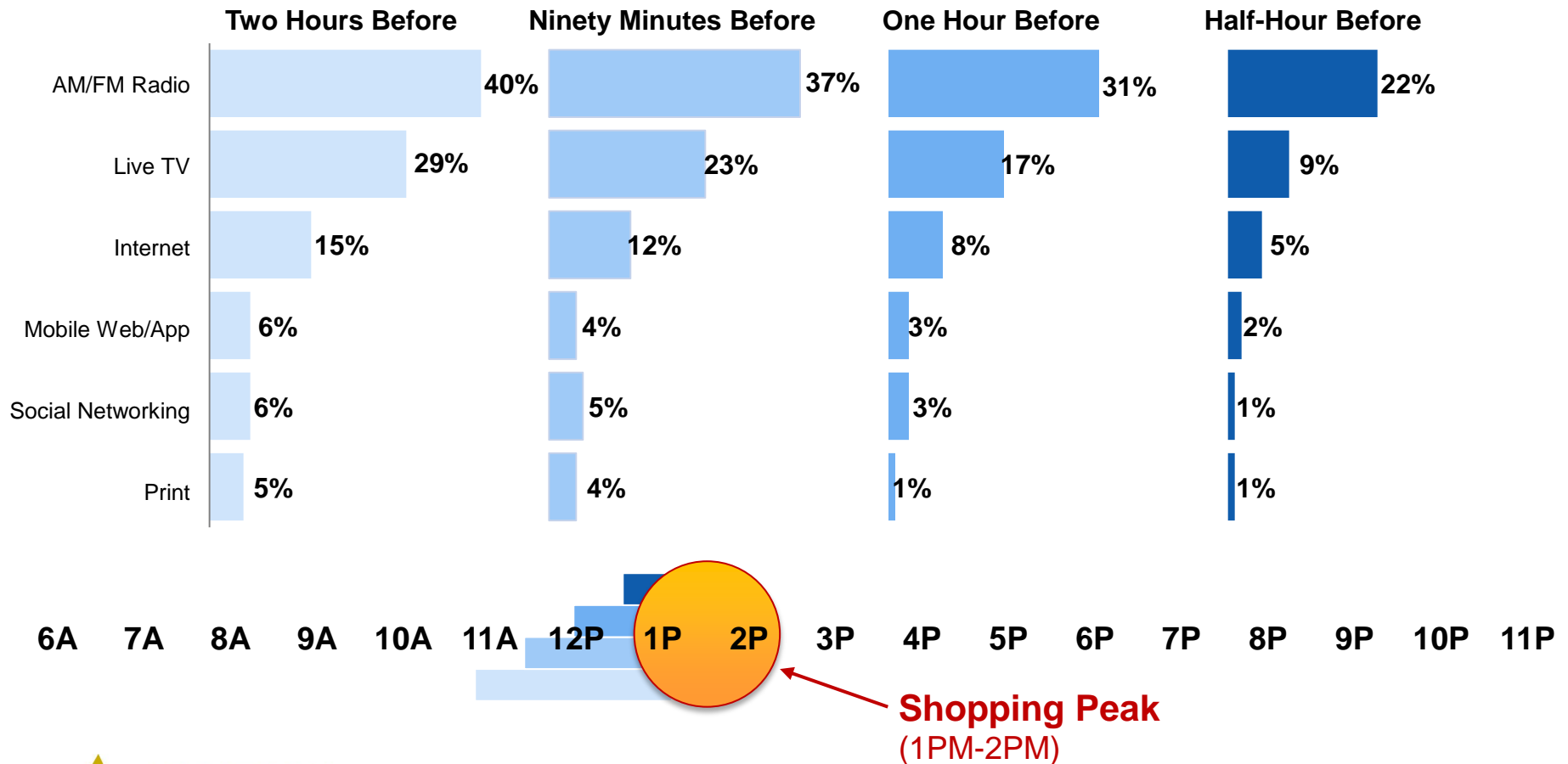
# The Peak Shopping Hour Is Between 1PM and 2PM

Percent of Adults Shopping By Time of Day, Persons 25-54



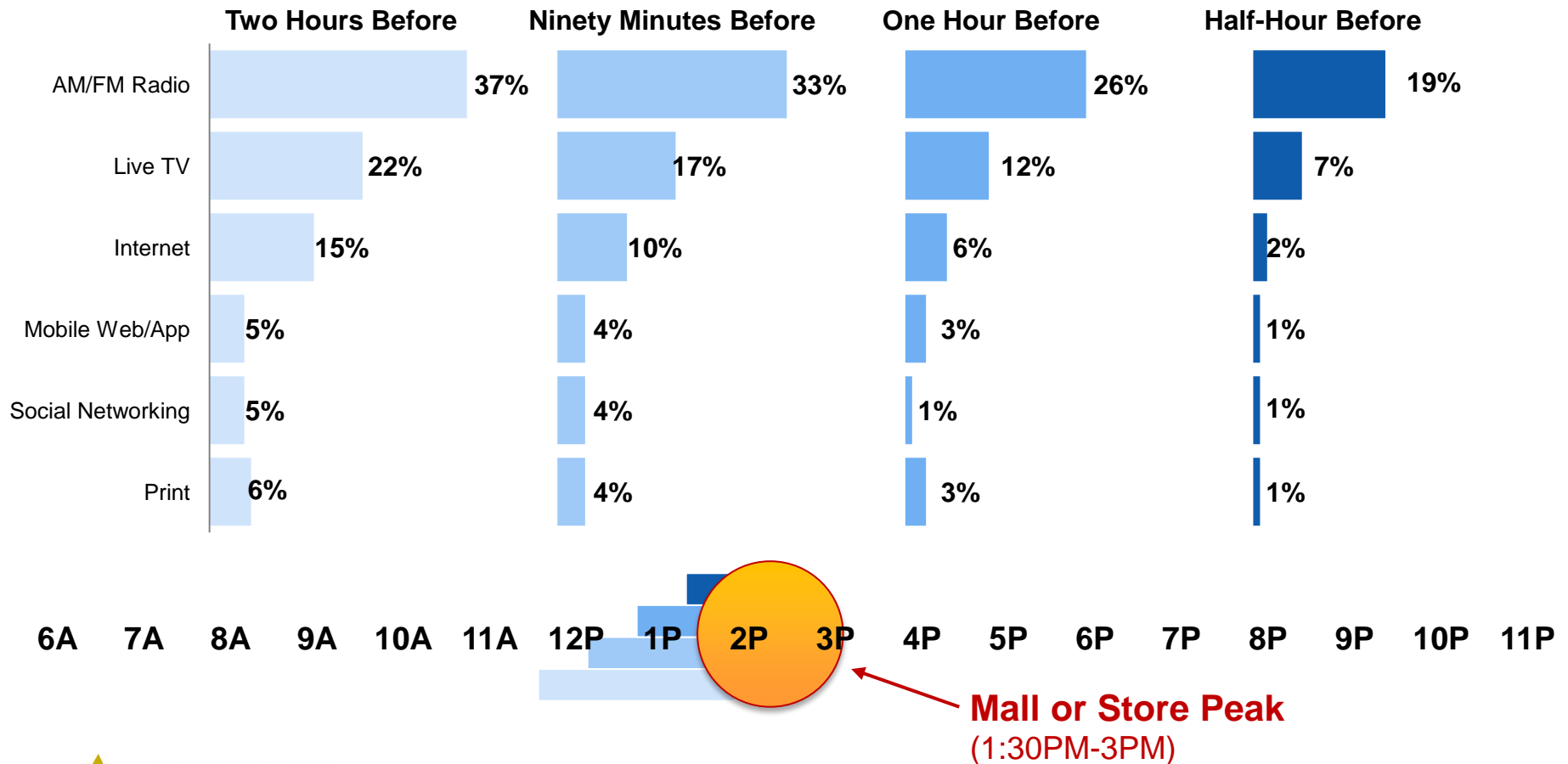
# By Far, AM/FM Radio Is the Strongest Pre-Shopping Medium

Reach for Given Medium in the Specified Time Period Before Peak Shopping Hour, Persons 25-54



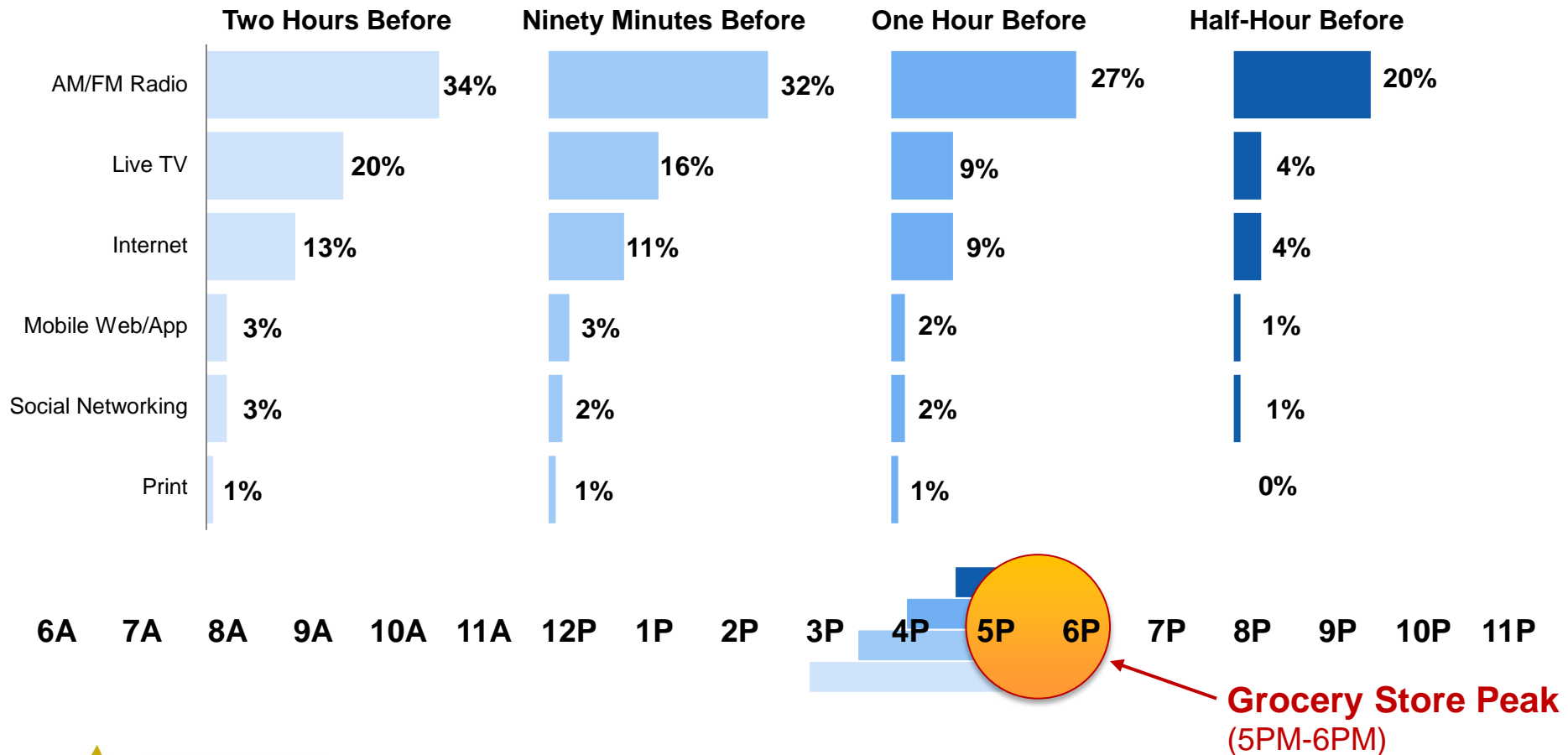
# AM/FM Radio Dominates Media Exposure Before Mall or Store Visits

Reach for Given Medium in the Specified Time Period Before Peak Shopping Hour, Persons 25-54



# AM/FM Radio Tops Media Exposure Prior to Grocery Store Visits

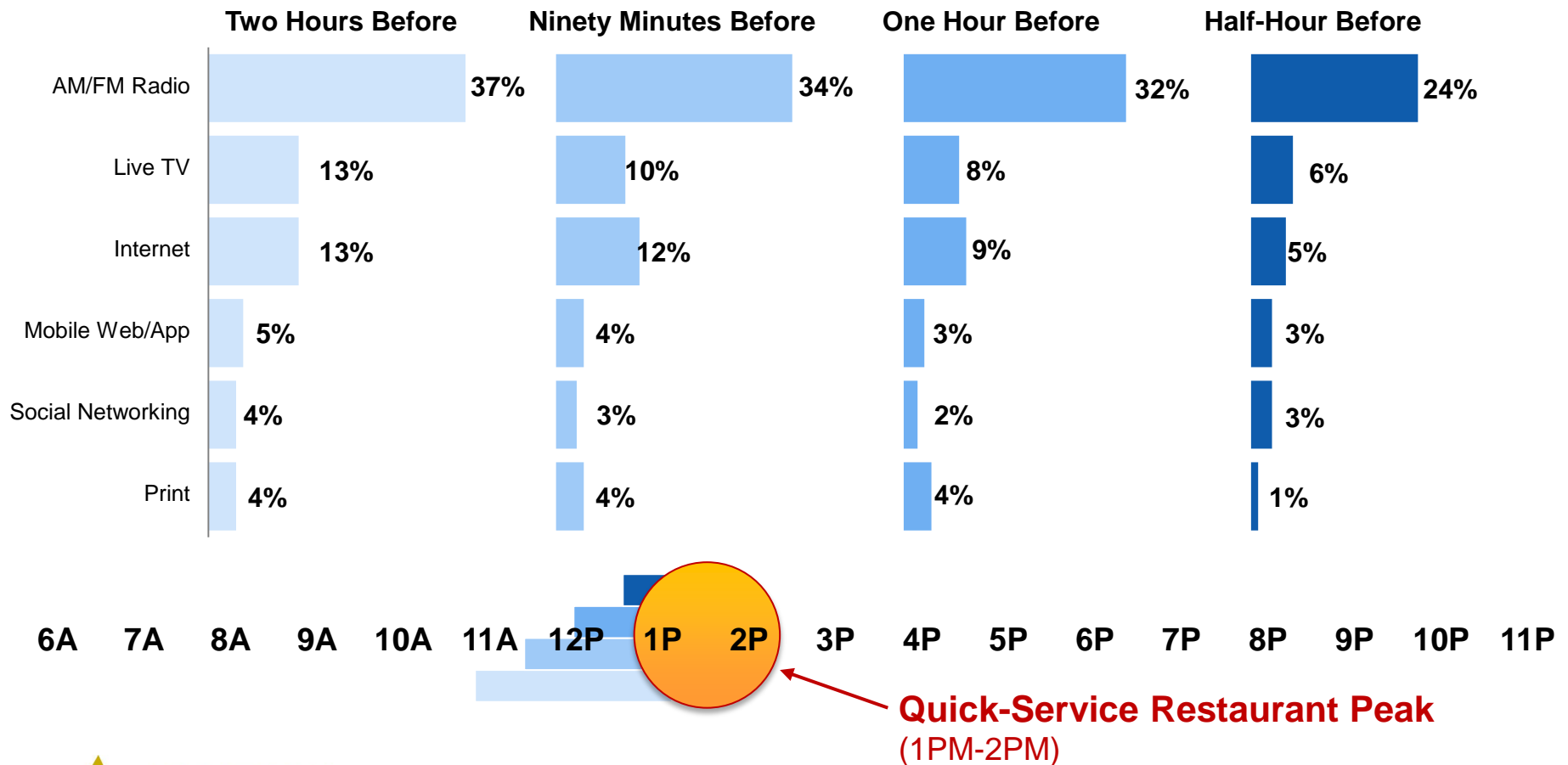
Reach for Given Medium in the Specified Time Period Before Peak Shopping Hour, Persons 25-54





# AM/FM Radio Reaches More 25-54s Before Visits to Quick-Service Restaurants Than Other Media

Reach for Given Medium in the Specified Time Period Before Peak Shopping Hour, Persons 25-54



# What We Learned...

## AM/FM Radio Delivers

- » Consistently big audiences, especially during the day when most shopping occurs
- » “The last word” for advertisers reaching the most consumers right before they shop
- » Enhanced reach when combined with other media
- » An ad environment relevant to where consumers are going and what they are doing
- » A highly engaged, attentive, and positively minded audience
- » A variety of decision influencers



# Arbitron Resources for Radio

## » [www.arbitron.com/home/radiotoday.htm](http://www.arbitron.com/home/radiotoday.htm)

- *Radio Today*: Listening trends and updates on how radio reaches American consumers
- Case studies
- Radio insights
- Presentations and brochures

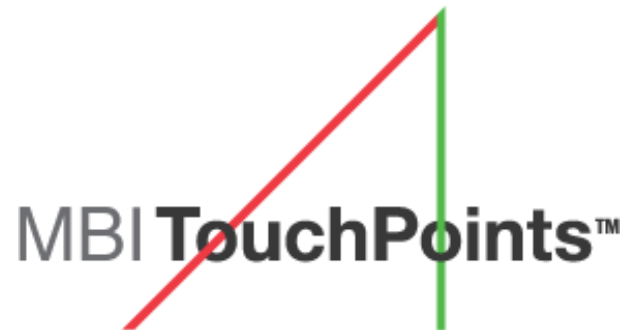
## » [www.arbitron.com/home/studies.htm](http://www.arbitron.com/home/studies.htm)

- Research studies to help radio
  - *Infinite Dial 2012: Navigating Digital Platforms*
  - *What Happens When the Spots Come on: 2011 Edition*

## » [my.arbitron.com](http://my.arbitron.com)

- Arbitron client site
  - *This study and other resources to help our customers*

# Special Thanks To:



[www.mediabehavior.com](http://www.mediabehavior.com)

