

TABLE OF CONTENTS

I. Points Of View	1
Dispelling Myths About Radio: It Is a Reach Medium	3
Making Spot Radio A “Friendlier” Medium For National Advertisers	12
Exploiting Radio’s “Timing” Capabilities	14
Bridging The Confidence Gap Between National Advertisers And Radio	16
II. Capsule History Of Radio	19
III. Radio Basics	29
Trends In Ownership And Facilities	31
Radio’s Penetration: 1925-2009	32
Number Of Commercial AM & FM Stations In Operation: 1922-2008	33
Commercial Radio Stations By Format: 1999-2009	34
Ad Revenues And Profits	35
Annual Radio Advertising Revenue Trends: 1970-2008	36
Radio Advertising Spending Trends: 1935-2009	37
National Advertising Spending In Five Media: 1935-2009	38
Local Advertiser Spending In Four Media: 1935-2009	39
How A Typical Radio Station Makes Its Profits	40
IV. Radio Audiences	41
How Radio Audiences Are Measured: From Hooper To Arbitron’s PPM System	43
Radio’s Challenge: Using PPMs To Chart New Directions	47
Radio Listening Patterns	49
Estimated Average Hours Of Radio Listening Per Person Aged 12+ On An Average Day: 1940-2009	51
Estimated Average Daily Time Spent With Radio By Age & Household Income	52
Average Quarter-Hour Listening Levels By Hour & Day Of Week	53
PPM Vs. Diary Rating Levels In 14 Major Markets	54
Arbitron PPM Vs. Diary Rating Adjustment Factors By Age/Sex	55
Radio Station Format Appeals	56
Weekly Radio Format Reach By Sex, Age, Household Income & Race	57
Location Of Listenership	59
Internet Radio: Another Option For Radio Listeners	62
Persons Aged 12+ Who Claimed To Listen To Online Radio In The Past Week: 2000-09	63
Composition Of Past Week Internet Radio Listeners By Demographics	64
How Much Time Is Spent With Digital Radio?	65
Share Of Exposure To Encoded Streams Of AM/FM Stations For Persons Aged 6+	66
Satellite Radio: An Important Factor For The Future	67
Composition Of Adult Satellite Radio Subscribers By Demographics	68

Continued >

V. Reach And Frequency Patterns 69

- Radio Reach Potentials 71
- Radio's Average Daily Reach By Sex, Age & Household Income Segments 72
- Radio's Average Day And Total Week Reach By Daypart For Persons 12+ & Teens 73
- Radio's Average Day And Total Week Reach By Daypart For Men & Women 18+ 74
- Radio's Average Day And Total Week Reach By Daypart For Persons 18-24 & 25-34 75
- Radio's Average Day And Total Week Reach By Daypart For Persons 35-44 & 45-54 76
- Radio's Average Day And Total Week Reach By Daypart For Persons 55-64 & 65+ 77
- Radio's Average Day And Total Week Reach By Daypart For Persons 12+ With Household Incomes Of \$25-50K & <\$25K 78
- Radio's Average Day And Total Week Reach By Daypart For Persons 12+ With Household Incomes Of \$75K+ & \$50-75K 79
- 1-4 Week Reach Data For Radio 80
- Estimated Metro Area 1-4 Week Radio Reach Levels By GRP Levels For 3-, 5-, 7- & 10-Station Buys 81

VI. Qualitative Factors: Going Beyond The Demos 83

- Listener Involvement 85
- Adult Listeners Claiming Various Levels Of Attentiveness By Station Format 88
- Commercial Zapping Rates For Radio 89
- Lead-In Program Listeners Retained Per Commercial Minute By Position & Length Of Pod 91
- Lead-In Program Listeners Retained Per Commercial Position In Six-Minute Pods By Age Group 92
- Lead-In Program Listeners Retained By Lowest Rated Commercial Minute By Dayparts And Weekday/Weekend Times 93
- Radio Formats Target Different Advertising Mindsets 94
- Relative Indices Of Strong Agreement With Selected Statements About Radio Ads By Radio Station Format Weekly Listeners 96
- Radio's Imagery Transfer Capabilities 97
- Radio's Commercial Advertising Impact Variables 98
- Average Proven Recall Scores For 60- & 30-Second Radio Commercials By Ad Format 99
- Average Proven Recall Scores For 60- & 30-Second Radio Commercials By Number Of Brand Mentions In Ad 100
- Average Proven Recall Scores For 60- & 30-Second Radio Commercials By Number Of Ideas In Commercial 101
- How Radio Can Be Utilized To Redirect An Advertiser's Media Weight To Light TV Viewing Segments 102
- How A Hypothetical TV-Only Plan Distributes Its Audience By Heavy-Light Viewing Segments 104
- How One-Third Of The TV-Only Budget Would Perform If Spent In Radio By Heavy-Light Viewing Segments 105
- Performance Of TV & Radio Plan By Heavy-Light Viewing Segments 106
- Comparison Of All-TV Vs. TV & Radio Plans In Targeting Heavy-Light Viewing Segments 107
- Profiling Heavy, Moderate & Light Radio Listeners 108
- Composition Of Radio Listener Quintiles By Demographics 110
- Relative Indices Of Duplication Between Radio Listener Quintiles & Heavy-Light Users Of Other Media 111
- Relative Indices Of TV Genre Viewing By Heavy, Average & Light Radio Listeners 112
- Relative Indices Of Agreement That Advertising Provides Useful Information About New Products/Services By Heavy, Average & Light Radio Listeners 113
- Radio's Return-On-Investment Capabilities Relative To TV: A Four-Brand Analysis 114
- Study Shows Radio And TV Commercials Have Comparable Impact 116
- Average Findings For 16 Radio And TV Commercials 117

Continued >

Historical Data On Radio Vs. TV: How Well Each Conveys The Advertiser's Message118
How Various Commercial Impact Studies Rated Radio Vs. TV Messages.120
Pretesting Company Recall & Impact Norms For TV And Radio Commercials121
For Advertisers, Two Mediums Are Better Than One122
Relative Indices Of Ad Effectiveness For Various Combinations Of Media For Five Advertisers.124
Radio In The Media Mix: Many Pluses But Some Minuses125

VII. Resources. 129

