

Getting to the Voter

Examining recent studies and lifestyle factors that affect consumer media usage

2006

Where Does Our Time Go?

And how has lack of control over it changed us?

What exactly IS
“time poverty”?



Time, place and environment mean more than ever when trying to communicate – to connect -- with people.

The Power of Personal Connection

“People relate to media in much the same way they relate to other people. To feel involved, they must benefit from the **relationship**. It’s about *connecting*, and it’s more difficult than ever, because people are rejecting media that fail to meet their specific interests and lifestyles.”

Mike Drexler

CEO

Optimedia USA

Adweek, February 9, 2004

What Media Provide that Connection Best?

Radio stations, “appointment” TV programs (American Idol), TV Talk Show Hosts (especially Oprah) and Local TV news programs all connect emotionally to consumers and provide the opportunity for organic integration.

Only Radio provides access to the *same* neighborhood 24/7, and can actually respond *in real time* instantaneously.

Radio has the *power* to connect to people.

Studies from the Radio Advertising Effectiveness Lab verify that.

Radio connects one-on-one

A study done by Wirthlin Worldwide recently compared consumers' attitude toward radio, newspaper and TV. Their findings:

- ❑ When compared to television ads, *radio ads are seen as being more personally connected to the consumer.*
- ❑ Radio listening is a one on one and **emotion driven** experience, and listeners believe that both the medium and its advertising are more *relevant to them* (compared to television and newspapers).
- ❑ We also see...radio's ability to connect with people *emotionally*. When people cite *radio ads' greater association with honesty, trust, and reliability*, we believe consumers have a more internal, more *values-based relationship* with the ads they hear on radio.

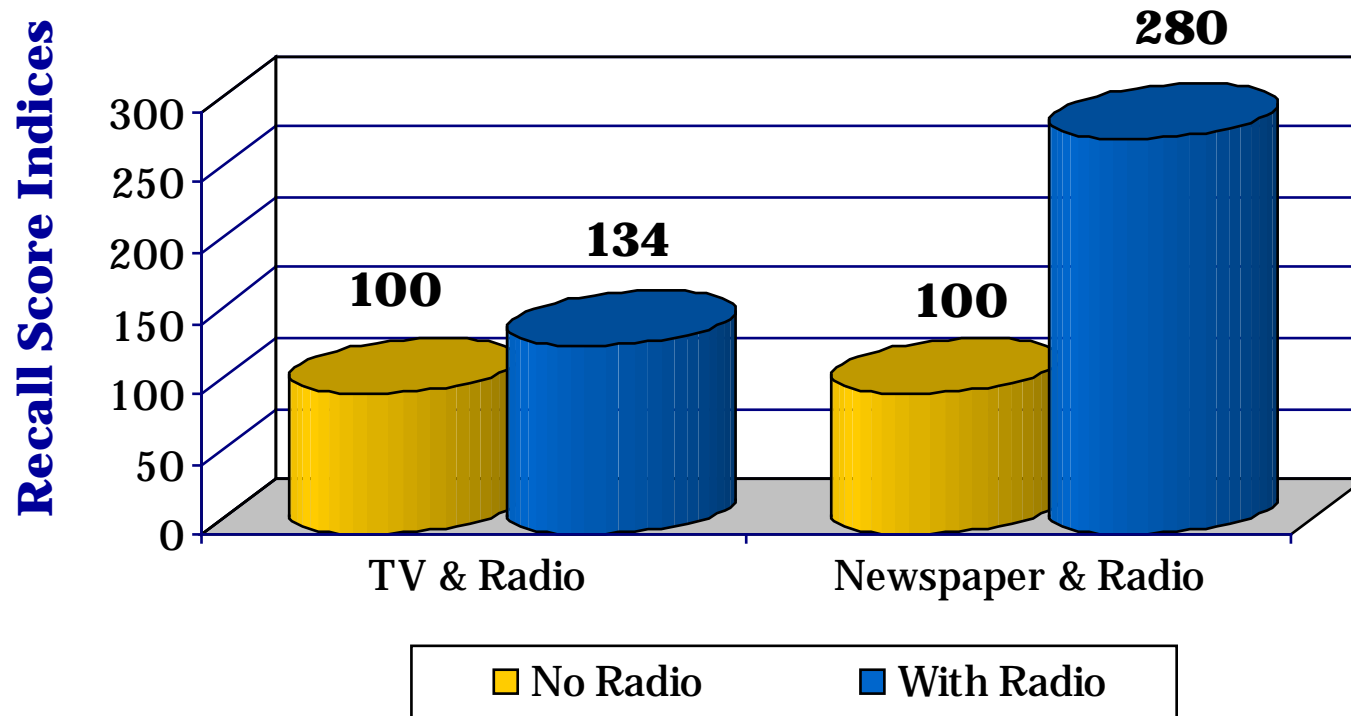
So what happens when you put the emotional connection of radio with its listeners to work with newspaper or TV/Cable TV?

Magic.

The Backyard Fence Factor Makes it Better

Unaided Brand Recall improves when radio is added to the media mix.

2 TV/Newspaper ads vs.
1 TV/Newspaper + 2 Radio Ads



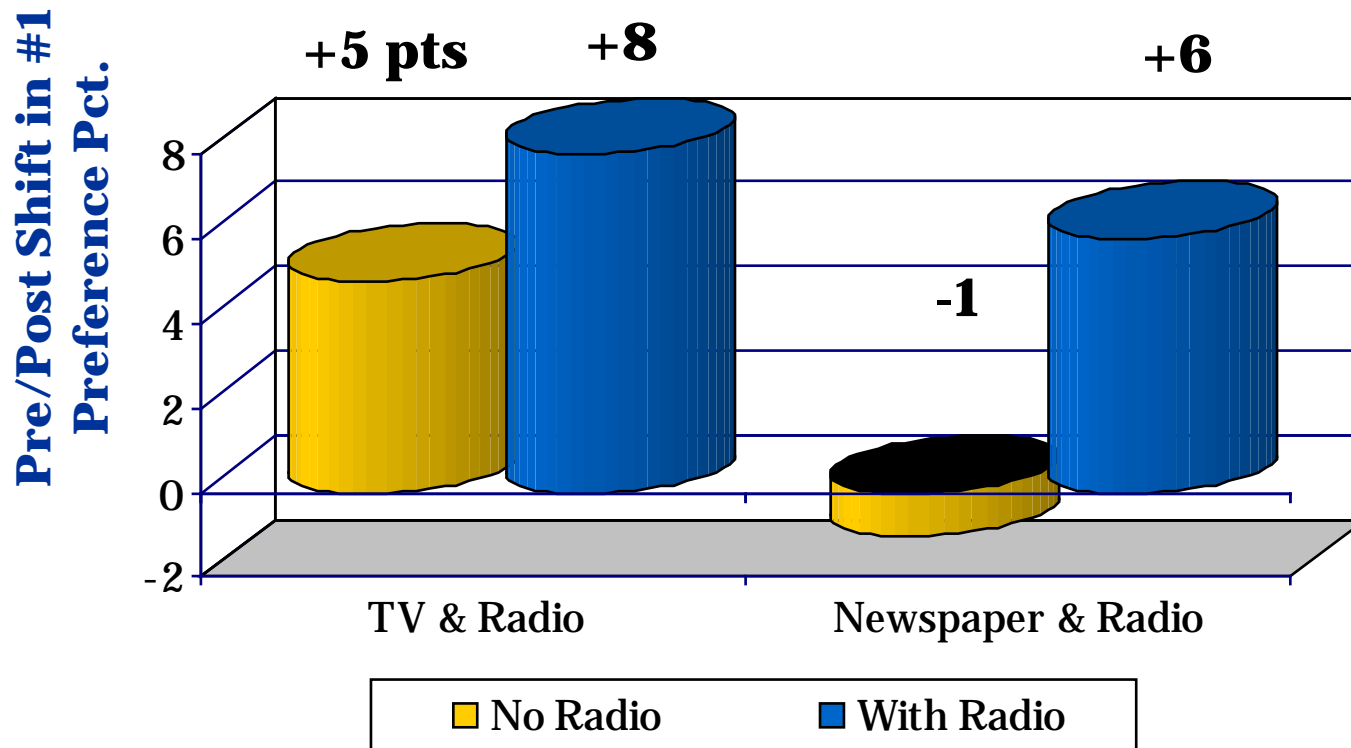
(Approximately 100 respondents per group)
Radio groups indexed to no radio groups

Source: PreTesting Lab Study released 12/8/2004 by the Radio Advertising Effectiveness Lab (www.radioadlab.com).

Radio Can Influence First-Choice Brand Selection

First Choice Brand Selection increases when radio is added to the media mix.

**2 TV/Newspaper ads vs.
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(Approximately 100 respondents per group)

Source: PreTesting Lab Study released 12/8/2004 by the Radio Advertising Effectiveness Lab (www.radioadlab.com).

**Given today's Rushed Lifestyles,
Where are you most likely to find
voters and potential voters, and why?**

Drivers of Change

What creates lack of control

- ❖ Increasing traffic congestion
- ❖ Increasing percentage of population going to work
- ❖ Urban spread – the end of the city, the realization of the urban area that encompasses multiple cities, even counties

What creates ability to cope with uncontrollable change

- ❖ Shifting retail scene
- ❖ Radical changes in communications technology
- ❖ Evolution of entertainment and information delivery systems

These are some of the factors that have created an increased need for the kind of availability and companionship that local radio provides to its listeners.

The number of commuters and commute time have increased.

- ❑ The commute time was about 34 minutes in Atlanta, above the 30 minute average.
- ❑ Fifteen Georgia counties - all in the metro Atlanta area - made the U.S. Census Bureau's list for the top 100 counties with long commutes. In addition, Coweta County, southwest of Atlanta, was listed as the county with the nation's longest commute, clocking in at 51.6 minutes, according to census figures.
- ❑ Atlanta's radio stations have a very captive and loyal audience, thanks to Atlanta's notoriously long commute times. Time spent in the car navigating Atlanta's crowded roadways means time spent navigating Atlanta's airwaves as well.

You Get the Picture

- ❖ *There are now three sure things:*
 - ❖ Death
 - ❖ Taxes
 - ❖ **Traffic**

And you'd better believe that affects where and how we spend our time.

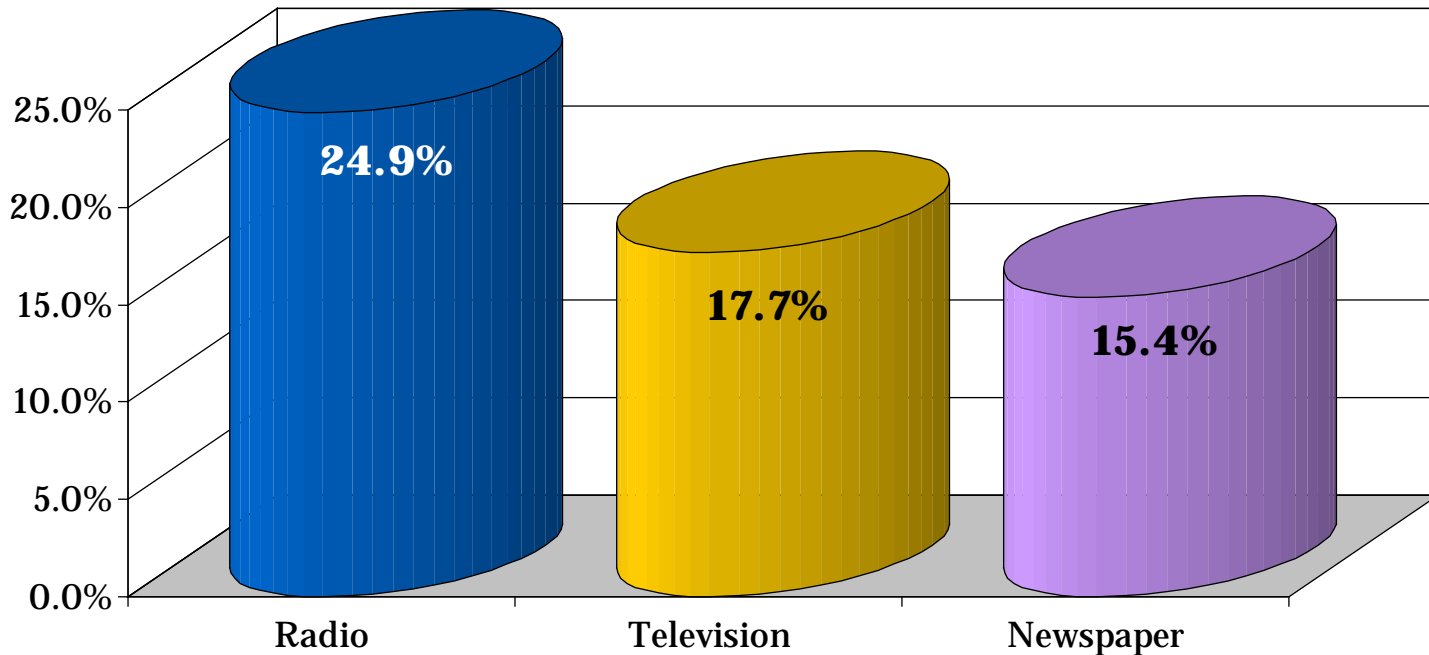


To start with, we spend less and less of our time around our home neighborhoods, and a lot of time with radio.

What about *Actual* Voters?

Atlanta

- ❑ **Adults 18+** who voted in local, state, national election in the past year are more likely to be heavy users of radio than heavy users of television or newspaper.



Who Used Media & How Much

Where would you be most likely to be able to reach, inform and influence voters in **Atlanta**?

Demo	% Radio	% Television	% Newspaper	# Who Voted
Adults 18-24	40.6%	30.3%	6.0%	109,900
Adults 25-34	29.1%	12.2%	8.0%	371,500
Adults 35-44	27.7%	11.7%	7.5%	523,200
Adults 45-54	26.2%	12.7%	20.1%	435,800
Adults 55-64	17.2%	28.7%	24.5%	310,700
Adults 65-74	20.2%	22.9%	24.9%	175,700
Adults 75+	8.8%	35.9%	30.4%	85,300

Of the 2 million Atlantans who voted in the last election, **500,600** are heavy users of radio, 377,700 tv and 309,400 newspaper

How to read: 40.6% of 18-24 voters are "Heavy Radio" users

Source: The Media Audit, Jun-Aug 2006, **Atlanta**, Adults 18+ Voted in last election.

58.2% of Adults voted in a local, state or national election in the past year.

25 - 64 year old voters represent **81.6%** of *all the ballots cast in Atlanta.*

Anyway you look at potential voters for the November 2006 election, the 25- 64 year olds will make the decisions. *And they are more likely to be heavy users of radio than of any other medium.*

Adults 25-64 Who Are Independents, Republicans or Democrats & Media Quintiles

Adults 25-64			
Market	Heavy Radio	Heavy Television	Heavy Newspaper
Atlanta Democrats	23.5%	31.5%	13.6%
Atlanta Republicans	26.2%	15.7%	8.2%
Atlanta Independents	24.7%	16.9%	17.2%
25-64 year olds	23.9%	17.3%	13.3%
Adult Voters	24.9%	17.7%	15.4%

How to read: 23.5% of Democrats are "Heavy Radio" users
 Source: The Media Audit, Jun-Aug 2006

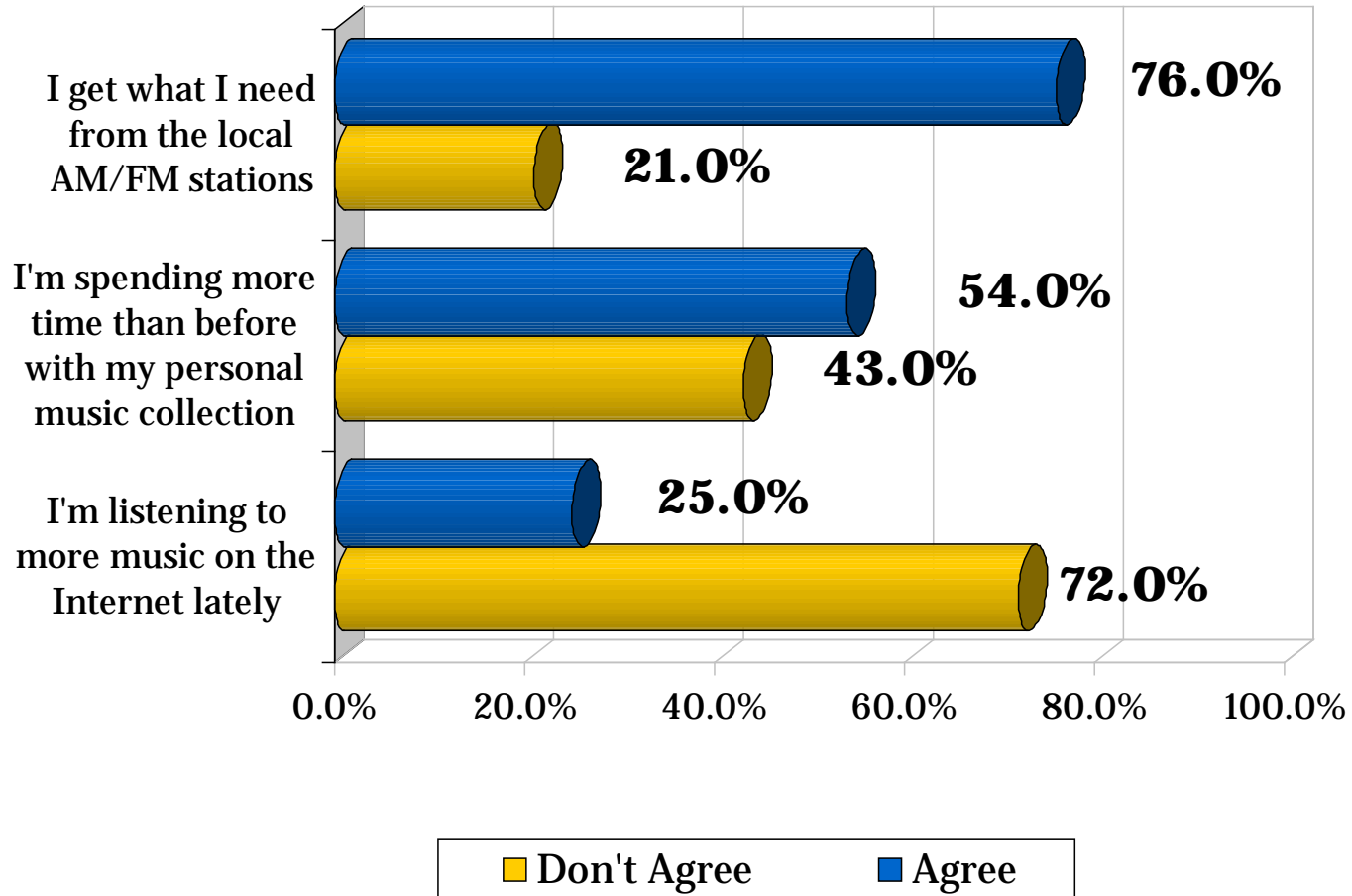
The May 2006 Field Poll was not an anomaly.

Most people use – and relate to – radio everyday.

Traditional Radio Serves the Public Interest

- ❑ Terrestrial radio is still used by **94%** of survey respondents each week for an average of **18.9** hours.
- ❑ The cumulative impact of new media on time spent listening remains small (less than 2%) decline.
- ❑ Over **75%** of those interviewed say that their local AM/FM stations are providing what they need in their daily and weekly radio listening

Radio is Still a Key Part of Our Lives



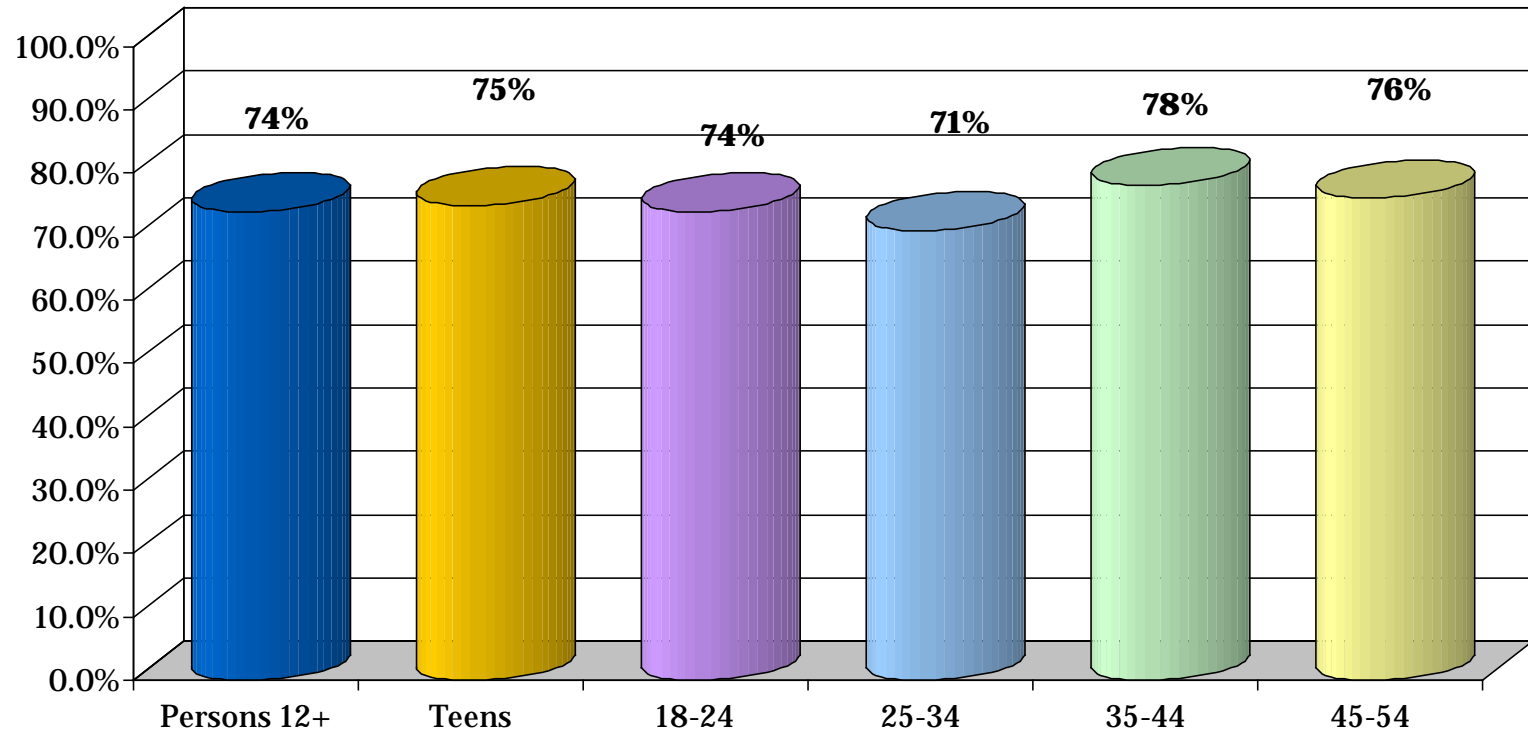
Source: BridgeRatings.com April 29, 2006 Study represents opinions from a representative sample of listeners to traditional radio interviewed by telephone in San Francisco, Seattle, Dallas, Chicago, Cheyenne and Boston. Sample error is +/- 2%.

New Survey Shows Radio Has Strong Appeal

- ❑ Americans rate the importance and relevance of local commercial radio very highly, despite the entry of high-technology competition
- ❑ The survey found that **78%** said ***radio is important in their everyday lives***, and **91%** said ***radio is important in American life in general***.
- ❑ Nearly three-quarters or **74%** said *they listen to radio at least once a day*.
- ❑ **64%** said they were listening to radio as much as, or more than, they were five years ago.

People are Satisfied with Radio

“Are you satisfied with what you hear on radio?”



Radio is a critical component in the lives of most people.

In fact the number of people using radio in Atlanta actually has *increased* each year, despite the growing availability of iPods, internet radio, cable TV radio and satellite radio.

Post Satellite Radio/iPod Radio Listening Trends

Cume Persons (00) 12+					
Market	2002	2003	2004	2005	% Change 2002 vs. 2005
Los Angeles	77,893	80,069	82,587	82,347	5.7%
Los Angeles Hispanics	37,872	39,582	42,097	42,927	13.0%

UPDATE WITH ATL NUMBERS

Even the President...

- ❖ Republicans used research before putting together their media campaign for President Bush in 2004. They found that Republicans were 15% less likely to see TV spots than Democrats.
- ❖ As a result they shifted from 95% Network and spot TV to 75%. The other 25% was spent in national Cable TV and spot Radio.
- ❖ “Bush outspent Kerry 2 to 1 on radio. They let us own radio. We were matched on TV...we owned the radio medium with precision and frequency and used it in a way to break through.”
- ❖ “Radio is likely to be a more important focus of campaign spending in the future. TV no longer delivers what it used to.”

Will Feltus

Sr. VP Research

National Media

Ad Age November 15, 2004

Radio stations are

- ❑ Virtual Neighborhoods
- ❑ Social Networks
- ❑ Local Connection Destinations
- ❑ Opinion Creators and Influencers
- ❑ Cultural, social reflections of the local marketplace
- ❑ Group conversations

They can react immediately, in real time, with real voices.

What other medium can do that?

Radio Stations Offer Multiple Portals

- ❑ Many “doors” to the neighborhood
 - ❑ Websites
 - ❑ Internet Streaming
 - ❑ Fan Clubs
 - ❑ Phone and fax lines
 - ❑ Instant Messaging
 - ❑ Podcasts
 - ❑ Appearances
 - ❑ Events
 - ❑ HD sub channels
 - ❑ Email blasts
 - ❑ Contests
 - ❑ Coupons
 - ❑ Text Messaging

Many ways to participate in these social networks

People Use Their Neighborhoods

The reality is, 72% of the people in Atlanta spend 2.32 hours per day every single day listening to local radio.

The fact is...

RADIO is

the most accessible of media
in our daily lives.

Local Radio.

It's where we live.