Radio • Television.......... ....

Direct Mail • Internet • Magazines

Newspapers • Outdoor • Place-Based

.... .Weeklies • Yellow Pages

MEDIA FACTS

A Guide to Competitive Media

Radio

Using this Guide

At no time in recent history have there been more unprecedented challenges to the creation and execution of an effective, results-oriented marketing plan. As consumers struggle to cope with the demands of a time-impoverished society, the challenges of an uncertain economy and political unease have combined to create a marketing environment that defies traditional logic — an environment that requires new approaches, new creativity, and new accountability for the bottom-line results of the advertising plan.

Add increases in costs and competition and dramatic decreases in the reach and impact of some traditional media, and it's no wonder that many advertisers are looking for help in designing and implementing an effective, efficient advertising strategy.

That's why the Radio industry combined its resources to produce this book.

This publication is intended not only to help you understand and evaluate the basic strengths of each medium, but also to make you aware of the concerns many advertisers share about them. The best decisions are informed decisions, and the material presented in these pages will help you make the intelligent choices about what medium or combination of media offers the best solutions to your sales and marketing problems.

Of course, we believe in Radio's power to accelerate and enhance the impact of any well-conceived marketing effort. That's why we've included some observations on how you can use Radio most effectively in combination with, or as an alternative to, other media.

Today more than ever, you are accountable for the results generated by your advertising plan. The Radio Advertising Bureau is ready to help you make the best productive decisions. RAB member stations in your area have access to thousands of strategic and creative ideas, or you can contact RAB direct, toll-free, at 1-800-232-3131.

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Radio

In a society characterized by time poverty and hectic consumer lifestyles, Radio stays closer to the consumer for longer periods during prime buying hours than any other medium. And Radio's targetability enables you to identify, reach, and motivate your best target customers with pinpoint accuracy, efficiency, and minimum waste.

Advertisers who recognized Radio's power voted with their budgets to the tune of $19.8 billion in 2000, a 12 percent jump over the previous year. Even during uncertain economic conditions in 2001, advertisers' confidence in Radio helped the medium avoid the sizeable advertising slumps suffered by other media.

Thousands of advertisers trust Radio as their exclusive advertising choice, and many more recognize Radio's value as an accelerant in the advertising plan; like lighter fluid sprayed on softly glowing embers, Radio creates immediate spark, excitement, and — most importantly — results!

Network Radio

While many advertisers work with local Radio stations, larger regional and national advertisers with broader product/service distribution may benefit from advertising on network Radio.

Network Radio offers advertisers access to the local marketplace from a national platform. With network Radio, it's easy to increase geographic reach (perhaps as broad as the entire country) and reach demographically targeted consumers with enough message frequency to generate results quickly.

Network Radio provides affiliate stations with news, crisis coverage, sports, entertainment features, and myriad other programming options. Networks also syndicate high-profile, personality-driven programming in all genres and formats. Live content is fed via satellite directly to affiliate stations, while programs that are not as time-sensitive are distributed on CD.

In exchange for network-produced programming, Radio stations agree to air network commercials. Network Radio allows advertisers to associate their advertising messages with some

of the country's most successful music, news, talk, and sports programs and personalities. Traditionally, network Radio had been heavily concentrated on news and sports stations. Today, it has significantly expanded its programming, reaching women and younger demos. This affords national advertisers access to more stations in more markets, across a wider variety of program formats than ever before.

Imagery Transfer

Advertisers with significant investments in television face a constant struggle in balancing the need for an ongoing marketing presence against escalating prices and fragmented audiences. Radio offers a way to perpetuate — and strengthen — the visual images associated with television advertising through a process known as "Imagery Transfer."

"Imagery Transfer" studies show that by airing the audio portion of a well-crafted television commercial, Radio can stimulate the mind to recreate the visual image originally placed there by the television message. The data proves that "Imagery Transfer" is successful with three out of four consumers, making it a very efficient method of extending and enhancing a brand's "visual" image.

Combining Radio and TV allows advertisers to:

- Extend campaign reach
- Substantially increase message frequency
- Improve awareness while the TV campaign airs
- Perpetuate awareness between TV campaigns
- Maximize the return on the advertising investment
- Reach active consumers, out-of-home, closer to their buying decisions

By adding Radio to your TV schedule, you can reinforce the dollars you spend on television by using Radio to build the reach and frequency necessary to effectively target your best customers … with far greater results!

RADIO ADVERTISING BUREAU Radio

Newspapers..............................

Declining ad revenue, decreasing circulation — it's a one-two punch that one would expect to knock newspaper out. However, the position most newspapers enjoy in their local markets won't disappear tomorrow. Many advertisers still swear by this medium — even if it's from sheer habit.

In general, newspaper circulation has been declining since the end of World War II, and the amount of time readers spend with their papers is slipping as well. According to Veronis Suhler, Americans spend 151 hours per year (2.9 hours per week) reading the newspaper, 15 hours less than in 1995 — and that number is projected to drop another 7 hours per year by 2005.[1] Moreover, only slightly more than half of all newspaper readers look at "Section I" of their paper (the front page section), and that's far and away the most heavily read part of the paper![2]

Younger readers don't depend on the print media the way their grandparents did. Readers under age 35 are spending less time than ever with their local paper.[3]

In most markets, circulation is flat or declining, while paper costs and other factors continue to drive production costs up — and that leads to bigger ad rates for smaller impact.

After increasing 6.8 percent in the second quarter of 2000, newspaper ad revenue dipped 8.4 percent for the same quarter in 2001, according to preliminary estimates from the Newspaper Association of America (NAA). The situation had worsened from the first quarter, when expenditures slipped 4.28 percent to $10.4 billion. This put the figures at a 6.5 percent decline for the first half of 2001 to $21.4 billion.[4]

According to the NAA, newspaper advertising accounts for 20 percent of the total U.S. advertising pie, a percentage matched by no other medium and approached only by broadcast television and direct mail.[5]

Faced with declining circulation, the newspaper industry has dramatically redefined what counts as "paid circulation." Now, copies sold for any price (even a penny) count as much as copies sold for full price in newsstands or through subscriptions, according to revised guidelines from the Audit Bureau of Circulations, the newspaper industry's circulation "watchdog."[6]

And other challenges remain. The Internet has given the newspaper industry continued competition for classified ads — a $19 billion category in 2000 representing 30 to 50 percent of ad revenue for many papers.[7] Employment ads in particular are being targeted not only by Internet companies, but also by enterprising Radio stations seeking a slice of the recruitment pie.

Advantages

History: One of the oldest, most highly regarded media in the U.S. Among its loyal readers, it enjoys a high degree of familiarity, acceptance, credibility, and respect.

Visuals: The newspaper's combination of text and graphics, when used effectively, can create visual appeal that reinforces the messages of its advertising.

Mass Audience: Newspapers reach a relatively large mass audience throughout the market with a single exposure.

Ad Variety: The medium offers a variety of ad sizes that allows advertisers to meet their budgetary constraints.

In-depth: Newspaper ads have the ability to communicate lengthy, complex, or detailed information and descriptions.

Ease of Tracking: It's relatively easy to track response, primarily through couponing.

Lead Time: Advertisers can place orders and copy with a relatively short lead time.

Exposure: The reader controls the amount of exposure to a given ad. They can spend as much or as little time with an ad as they like.

Disadvantages

Decreasing Penetration: In most markets circulation is less than 50 percent of all households[8] (please ask for the RAB Newspaper Performance Report based on ABC data for your market).

Ad Clutter, No Separation: A typical daily newspaper is 60 to 62 percent ads; the Sunday edition carries 68 percent advertising, not counting free-standing inserts.[9] Your ad placed next to your competitors' can only be an advantage if your price is absolutely the lowest.

Passive: The paper provides information once consumers decide to buy, but it does not build brand awareness or create product demand. Newspaper advertising thus works mainly for comparing prices.

Browsers, not Readers: Most people don't read all sections of the paper every day. Ads in a given section reach only those who read that section. Even the most-read section ("Section I") is seen by only about half of newspaper readers.[10]

Readers Don't See Ads: On average, only 42 percent of readers will recall noting a full-page ad[11] (for specific ad noting factors, see your market's RAB Newspaper Performance Report).

Can't Target: It's difficult to accommodate selective approaches that improve your cost efficiency and enhance frequency against clearly defined, high-potential customer segments.

Couponing is Declining: Despite increased coupon face value, redemption has been declining for years.

New Competition from Outside: One of newspaper's strongest ad categories (classifieds) is under attack both from Internet firms and savvy Radio stations.

Plus *Radio*

Adults 18+ spend three hours and three minutes per day listening to Radio ... considerably longer than they spend with newspaper (less than 37 minutes).[12]

Using Radio together with newspaper increases the reach of your advertisement among light readers and younger consumers and adds impact through message frequency. That means bigger and faster results.

Studies show that ad size has little impact on ad recall, so you can decrease the size of your newspaper ad and redirect those dollars into Radio. By doing so, you'll boost your reach and build message frequency without increasing your cost.

Radio reaches 63 percent of shoppers age 25-54 within one hour of purchase time — providing the greatest "purchase proximity" of all major media.[13] Combining Radio with newspaper allows you to influence your customers closer to the point of purchase when they are most receptive to critical marketing information.

The success of your marketing strategy depends greatly on how you reach and motivate your customers before their decision to purchase has been made. The intimate power of Radio can stimulate new demand by creating emotional reasons to buy your product and then directing customers to the newspaper for detailed information. It can help maintain loyal customers by keeping your name or brand image top-of-mind.

Radio is visual. Use it to create a vivid mental image of your product or service...images you simply can't create in print.

Broadcast TV

In the last 15 years, the three major broadcast television networks have seen their share of primetime TV viewers plunge from almost 70 percent to just 36 percent, with the remaining two-thirds of the viewing audience scattered among dozens of cable channels and syndicated programming sources.

For more than 50 years, broadcast TV has filled our living rooms with the flickering glow of a media revolution. From *The Honeymooners* to *Will & Grace*, TV has defined two generations of consumers. Of course, the tube does not possess the unifying power it once did. In the past, a show like Elvis Presley's comeback special or the final episode of *M*A*S*H* drew decisive majorities of the viewing audience; nowadays, with the explosion of other viewing choices such as cable, satellite TV, pay-per-view, rented videotapes or DVDs, and more, the U.S. viewing audience has fragmented. In the 1985-86 viewing season, ABC, CBS, and NBC held almost 70 percent of primetime share; by the 1999-2000 season, that percentage had plunged to just 36 percent, with the remainder scattered among dozens of cable channels and syndicated programming sources[1]. This splintering of ad viewers has diluted TV advertising's potency.

Broadcast TV ad revenue supports this picture; according to Robert J. Coen's estimates, the broadcast television industry raked in $44.8 billion in ad expenditures in 2000 — but only 35 percent of that figure is attributable to the four major broadcast networks (ABC, CBS, NBC, and Fox).[2]

Adding to the problem are the recent wars between satellite TV and cable. Satellite systems may sport hundreds of channels; cablecos responded with digital-cable technology offering nearly as many. No wonder the traditional broadcast networks attract smaller and smaller audiences.

Equally significant is the "time impoverishment" of the modern consumer. The most attractive consumers lead complex — even hectic — lives. Their PDAs are chock-full of important business and personal responsibilities, even as their cell phones notify them of new problems or opportunities. Simply put, consumers no longer have the time or inclination to shop — or consume media — like past generations. In fact, 40 percent of all TV viewers are considered "light viewers," having a TV on for less than 90 minutes a day[3]. The challenge for the modern advertiser is to reach these on-the-go consumers, a challenge that is increasingly difficult for home-based television to overcome.

Also important is the inverse relationship between income and TV viewing. To wit: The more people make, the less time they spend watching TV. The less people make, the more they watch. For many advertisers whose products or services require at least some degree of disposable income, this is a critical marketing issue today.

Finally, advertisers must assess the impact of the new personal video recorders (PVRs) such as TiVo — products that help the viewer eliminate swarms of TV commercials.

Advantages

Widespread: Over-the-air television reaches virtually all Americans. Ninety-eight percent of U.S. households have at least one TV.[4]

Time Spent: People spend a lot of time with their television sets. On average, U.S. viewers watch television about 18 hours a week.[5] Almost six hours of this is devoted to the major broadcast networks.

Way of Life: Baby Boomers (34- to 50-year-olds) and Generation Xers (18- to 33-year-olds) grew up with TV … and the medium continues to attract new, young audiences.

Mass Exposure: Some television programs can reach large mass audiences with a single exposure.

Visual Appeal: TV has the ability to grab attention and create appeal through the combination of pictures, sound, and motion.

Disadvantages

Audience Share is Decreasing: Television's network prime time audience has decreased dramatically, from 90 percent in 1980 (ABC, CBS, NBC) to just 36 percent (ABC, CBS, NBC) in 2000. The last increase — just one ratings point, and for only one year — occurred in the 1993-94 season and was the only positive blip in a 20-year downward spiral.[6]

VCR/DVD Use Decreases Viewership: As VCR and DVD player use increases, the impact of TV commercials decreases. Most homes (85 percent) have at least one VCR, and DVD household penetration in the U.S. has reached the one-third mark in just a few short years.[7]

Channel Surfing: When a commercial comes on, many viewers go surfing. They jump from channel to channel to avoid the commercials. Personal video recorders make it even easier to dodge the ads, giving consumers the power to skip over commercials even in live broadcasts.

Viewing Decreases as Income Increases: U.S. adults whose household incomes are in the top third are statistically more likely to be light TV viewers.[8] Compare with Radio's affluent listeners, which actually are more likely to listen to Radio as income level increases.

Skyrocketing Production Costs: A typical 30-second national commercial can cost hundreds of thousands of dollars to produce.

Restricted Viewing: Almost all television viewing takes place in the home, making it extremely unlikely that television advertising will influence consumers close to the point of purchase.

Plus *Radio*

Adults in $50K+ households spend nearly equal time each day with Radio and TV (3 hours 1 minute and 3 hours 19 minutes, respectively).[9] By adding Radio to your media mix, you can virtually double your impact on this important, upscale audience.

Despite what some advertisers think, the pretty pictures on your TV are LESS powerful than the audio, not more. If you doubt this, pop a horror movie in your VCR and watch it with the sound off — then listen to the sound with your eyes closed. Which is scarier?

Radio enhances the visual image you are trying to portray in your TV ad. Through the use of Imagery Transfer, three out of four consumers who have seen your television commercial will recall the visual images — and the message — when they hear the corresponding audio on the Radio. In fact, 75 percent of these consumers actually imagine themselves in the commercial upon hearing the audio.

Radio offers unparalleled cost efficiency and reasonable production costs. By spending less in the production stage, you have more budget to maximize the reach and frequency of your combined Radio and TV campaign.

Cable TV

Cable TV has contributed to the fractionalization of viewing audiences. In most areas, the number of channels available to the viewer is five to 10 times higher than the total number of Radio stations in the same area! And the promise of "a quality environment" rarely has been met.

The Cabletelevision Advertising Bureau (CAB) states that revenue derived from cable advertising grew from $5.7 billion in 1995 to an estimated $13.8 billion in 2000. The CAB projects 2001 revenues of $15.9 billion, or a 15 percent increase over the previous year.[1]

The vast majority of this revenue is derived from network cable advertising — 74.6 percent in 2001, up from 70.8 percent in 1995. Local advertisers' slice of the cable ad revenue pie, conversely, continues to decline; in 1995, local commercials made up 25.5 percent of cable advertising revenues, but by 2001, that percentage had dwindled to 22.7 percent.[2]

In spite of its past problems, the cable industry has added subscribers steadily over the years. As of July 2001, households with wired basic cable numbered 69,532,810, or 68 percent of all U.S. TV households.[3] However, the cable industry, which for so long had no real competitors, now faces a steady stream of defectors from the ranks of its subscribers. Direct-broadcast satellite (DBS) has captured nearly 17 million subscribers in just a few short years, and it is poised to acquire even more viewers now that the government has granted permission for satellite companies to offer local channels.[4] Although its progress currently is stymied, digital broadcast TV is coming; when it arrives, it may force burdensome channel loads and further audience fragmentation on cable systems.

While cable systems as a whole may reach into a large percentage of homes, their audiences are fragmented among dozens — even hundreds — of channels. The average system brings its viewers 62 channel choices.

Cable's promise of a "quality commercial environment" is belied by the ratings. Most weeks, many of the most heavily viewed programs on cable are wrestling shows and cartoons. While cable advertising generally is inexpensive, many advertisers question the value of their presence in these environments.

Advantages

Growth Spurt: Cable now reaches two thirds of all U.S. TV households, and even more (80 percent vs. 49 percent in 1985) among households with an annual income over $50,000.[5]

Inexpensive: Many advertisers consider cable to be “discount television.” Cable offers some of the same benefits (e.g., motion, visuals, sound) as broadcast television, at considerably cheaper rates.

Targetable: Cable can subdivide its audience into much more easily targeted segments than over-the-air TV can. More than half (60 percent) of viewers have 54 or more choices. Such an array of choices allows advertisers to target specific consumer groups according to their programs of interest.[6]

Consumer Appreciation: Most consumers like the cable they pay to receive. In 2000, Americans spent an estimated $39 billion subscribing to cable services and ancillary services such as telephony and Internet access.[7]

Summer Season: When the broadcast networks’ shows go on hiatus in the summertime, their reruns yield pride of place to cable networks’ original programming.

Disadvantages

Small Audiences: Because cable TV gives the viewer so many channels to choose from, cable audiences are considerably smaller than those of broadcast TV. During prime time, even the top cable networks rarely exceed 3 percent penetration among TV households.[8] Furthermore, competition from satellite TV has forced operators to offer digital-cable service, which means even more viewing options and further fragmented audiences.

Inaccurate local numbers: As many as 12 percent of U.S. households get their programming from alternative delivery systems (ADS) such as satellite TV — and the percentage is much higher in many major markets.[9] Because ADS subscribers cannot receive local commercials in national cable programming, any advertiser who relies on local-market Nielsen books to get a handle on cable delivery in his or her DMA must deduct the ADS percentage of the audience or get less than they pay for.

Limited Commercial Impact: Cable still is locked out of a third of all U.S. homes, and penetration is unlikely to increase too much beyond present levels. Cable (basic + premium) accounts for just 39 percent of all U.S. household TV set usage.[10]

Ad Clutter: It’s even worse than over-the-air television. While network TV typically carries a 24-unit spot load every hour, cable often carries as many as 28 units per hour — 17 percent more — making ads that much more annoying and therefore more susceptible to zipping, zapping, and time-shifting.

Quality: Local advertisers’ spots often are placed cheek-by-jowl with national ads. As a result, they are forced to choose between spending an ever-increasing portion of their budgets in an attempt to achieve comparable quality or accepting the disparity in production values and airing ads that look cheap by comparison.

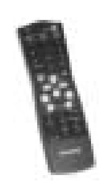
Plus *Radio*

By enhancing your cable television plan with Radio, you can reach consumers who watch little or no cable programming as well as those who do spend a share of their media time with the medium.

Radio, on the other hand, is the premier targeting medium. Cable may offer more targetability than traditional television, but still is limited. When you combine the right Radio stations with the right cable programs, you can create a highly focused campaign capable of generating maximum reach and frequency with the specific consumers who are most likely to purchase your products and services.

Unlike cable and over-the-air TV, top-quality commercials for Radio can be produced very cost-effectively. You even can use your Radio commercials as the audio track for your cable spots, boosting the synergy and creativity of your marketing plan.

By combining Radio and cable you not only can deliver more messages to your customers with greater frequency, but also can participate in special promotions that attract customers and increase sales.



Direct Mail..............................

Do you love direct mail or hate it? Your answer may depend on whether you're a marketer trying to stand out in the mind of your best consumer prospect or a consumer trying to keep from drowning in a river of "junk mail."

Many advertisers love direct mail; most consumers hate it. The ironic thing is, the root of both feelings is the same: Direct mail's impressive ability to get into our homes.

Advertisers love direct mail because it helps them focus and target their messages. Using sophisticated computer-database management techniques, direct marketers can target consumers by virtually any characteristic — location, education, age, sex, purchase history, etc. Direct mail also can be very useful in tracking consumer response, and its format allows for the distribution of product samples along with coupons. That's why marketers invested more than $44 million in direct mail in the year 2000.

In the minds of many consumers, however, direct mail conjures up a very different set of images. Most people have a very low opinion of direct mail — the derogatory term "junk mail" is proof of that — and as much as half of it winds up thrown away unopened. When people do read it, they tend to open mail only from advertisers with which they are already familiar. (In light of the tragic events of 2001, this tendency may become even more pronounced, further complicating the problem of getting the message read, rather than just delivered.)

Indeed, many consumers are so annoyed by the avalanche of junk mail bombarding their homes that a new industry devoted to helping people get their names removed from direct-mail lists has sprung up.

What's more, time-crunched consumers are not clipping and redeeming coupons the way they once did, reducing the impact and accountability of many direct marketing campaigns. The most recently available data indicates that despite a trend of steadily increasing coupon face values, overall coupon redemption has been in free-fall for the past 10 years.[1]

Despite these problems, many advertisers remain committed to the medium. The key is to find media partners that can enhance the apparent value of the messages reaching into consumers' homes — and Radio is ideally suited to the task.

Advantages

Targetability: With direct mail, an advertiser can target potential customers by geographical area, product affinity, previous purchases, and potential interest based on accumulated or purchased databases.

Reach: The medium potentially can reach every household in the market, or at least every consumer the marketer wishes to target, usually through mail-merge options.

Maintenance: Direct mail can be helpful in building and reinforcing existing consumer relationships through personalized mailings.

Tracking: Marketers can track response through coupon redemption and return-card/call-back options.

Precision: Direct mail allows an advertiser to convey highly detailed information about their product or service, as well as deliver product samples for consumers to try.

Disadvantages

Low Response Rate: Most direct mail marketers consider a response rate of only 2 or 3 percent to be successful. This means that up to 98 percent of the people you market to will reject or ignore your offer.

Attention: Much of the time, direct mail is thrown away unopened; when consumers actually do read their direct mail, they tend to read mailings from advertisers they know and like.

New Customers: Direct mail is less effective in attracting new prospects than in reinforcing existing customers. For any business whose future depends on expanding its consumer base, this is a significant liability.

Consumer Perception: Most consumers refer to direct mail as "junk mail" — and they have an even lower opinion of the more cost-efficient mail-merge packages that combine pieces from a number of different advertisers in one envelope.

Outdated Mailing Lists: Even among consumers who are not actively trying to have their names stricken from direct mail's rolls, there are many who move each year, making it difficult for direct-mail companies to identify and maintain accurate databases.

Declining Couponing: Time-crunched consumers are not clipping and redeeming coupons the way they once did, reducing the impact and trackability of many direct marketing campaigns.[2]

Growing Expense: Direct-mail costs are on the rise. Increases in postal rates, production charges, paper costs, and database fees have turned direct mail into one of the least cost-efficient of all media.

Plus *Radio*

How do you get people to open the direct mail they usually discard? By augmenting your marketing strategy with Radio to call attention to your mailings and precondition recipients to the benefits of reading and responding to your direct mail offers.

Using Radio in tandem with direct mail allows you not only to build sales with current customers, but also to reach prospects — specifically your competitors' customers, who are unlikely to open or read your direct-mail solicitations.

Unlike the "junk" perception associated with direct mail, Radio is the medium of choice for millions of Americans. No one thinks of their favorite Radio station as a nuisance, since they select only what they want to listen to. When these loyal listeners are exposed to your commercial messages within this more receptive environment, they are likely to give your direct mail more favorable consideration.

Internet

The old joke about the local weather can be adapted to conditions on the Internet: If you don't like the way things are online, wait around a few minutes and they'll change. Amid all the flux, however, the Net remains an excellent way to market certain products and services — IF it's done as part of a carefully conceived, carefully executed marketing plan.

The Internet, while still playing catch-up with older, established media such as newspapers, television, and Radio, has a record of explosive growth over much of its short history. From 1988 to 2000, online advertising climbed from $1.85 billion to $4.85 billion in 2000 — a 162 percent increase.

Of course, no industry could maintain such a steep climb forever; the 2000 figure above represents a 33 percent growth over 1999, and estimated 2001 growth has shrunk into the single digits at 8 percent. Still, growth remained respectable through 2000, with local online ad spending reportedly growing faster than the national component.[2]

As for predictions of the future, it's hard to say with certainty how much the medium will grow in the short term. "Dot-com" companies always have done the majority of online advertising — but a dishearteningly high number of such companies either have gone under or teeter on the brink. As with virtually every advertising medium, online advertising had to break out the red ink in the first half of 2001, with losses slightly offset by modest gains in the second half to reach the projected 8 percent growth cited above.

Still, the Internet remains an intriguing place for many advertisers to market their products and services. In the past, online campaigns for products geared to the Net's original user demographic (namely males age 18-34) were most likely to succeed. However, in the last couple of years the online population has changed to more closely mirror the general population.

While e-commerce is off to a slow start, many consumers use the Web to gather information before making a purchase.

Advantages

Direct Response: With the Internet, you can reach highly educated and affluent consumers who are able to purchase your products or services with a click of the mouse.

Interactivity: The Internet allows your customers to communicate directly with you; they can tell you what they do and don't like, what they want, and what they will buy.

Tracking: Internet technology allows you to measure exactly how many people saw your message … and how they responded.

Immediacy: Thanks to online commerce, your message can reach consumers just before they buy online … and offer detailed information to shape the buying decision.

Flexible: The Internet allows you to change your message frequently; in fact, Internet experts suggest that you must continually change your offerings to keep them fresh.

New and Exciting: As more and more consumers buy their first computer or finally get around to acquiring an Internet connection, there is a steady influx of consumers experiencing the Web for the first time. This sense of novelty and wonder will persist for some time before Web surfing becomes an experience to be taken for granted.

Disadvantages

Perception: Advertising is becoming more accepted on the Internet. However, the flip side of increased acceptance is decreased awareness. Many Internet users simply tune out ads or even block them with software designed for the purpose.

Consumer Concerns: In theory, e-commerce is safe, simple, and easy. However, despite evidence of the security of online transactions, publicized reports of credit-card theft on the Net have made many consumers hesitant to use their credit card numbers online.

Time: Although the installed base of high-speed Internet access technology is growing, a significant base of users still is accessing the Web using modem speeds of 56 kbps or slower. Hardware bottlenecks make navigating the Net a slow, tedious process. Many users, turned off by the time it takes to view graphic-heavy pages, move on quickly when they don't think the site is worth the wait.

Infrastructure Problems: The 2000 online holiday shopping season taught e-tailers some bitter lessons. As consumers flood the Internet looking to shop and buy, sites that don't sufficiently prepare for the onslaught will be plagued by painfully slow loading times or outright crashes. Moreover, e-tailers are very dependent on timely shipping, a possible weak link that could break down just when it's needed most. Loss of online visitors means your advertising will be less effective.

Plus *Radio*

Radio and the Internet make perfect marketing partners. Radio has proven its ability to drive consumers to advertised Web sites, and many Radio stations have their own Web sites offering advertisers unique multi-media marketing opportunities.

With Radio you can target specific customers by demographic group, lifestyle trends, and specific product affinity. And since the average Radio listener spends more than three hours each weekday and more than five hours per weekend with their favorite stations, it's easy to generate enough message frequency to get them to check out your online advertisement.[4] As Radio draws consumers to your online message, it can encourage them to print special coupons directly off the Web and redeem them at your place of business.

Radio is virtually the only medium a computer user can enjoy while browsing the Internet; in fact, streaming audio allows users to listen to hundreds of both offline and Internet-only Radio stations through their computers while online. Your Radio message can draw the attention of potential online customers before, during, and following their Internet use.

Magazines...............................

Name just about any human endeavor you can think of, and chances are there's a magazine devoted to it. However, the flip side of wide title choice is that many magazines don't reach enough consumers to be effective — and survival in the competitive magazine business is tough. Witness the recent collapse of some of the best-funded and most heavily promoted publications!

Magazine advertising revenue totaled $17.7 billion in 2000, a 14 percent increase over 1999.[1] There were 347 new magazines launched in 2000, adding to a base of nearly 18,000 titles on nearly every subject ever put to paper.[2] Look at 2001, however, and things seem a little cloudier.

According to the Publishers Information Bureau, magazine advertising pages fell 6.8 percent in the first quarter of 2001 compared to the same period in 2000. More disturbing for publishers is that ad pages fell 14.3 percent in the second quarter. Revenues slid from $10 billion to $9.7 billion for that six-month period according to PIB, the first drop in nine years.[3] In the latest six-month audit, the Audit Bureau of Circulations reports that of the top 200 consumer magazines, nearly 40 percent saw circulation declines.[4] Several high-profile magazines have badly missed their circulation targets.

The magazine industry is worried about the future of reading in this country — and with good reason. The sad fact is that Americans read less than they used to (many because they simply have less free time to devote to reading). Reaching that coveted 18-34-year-old demo by advertising in magazines is becoming increasingly difficult. Advertisers are looking at the next generation of time-challenged, seemingly print-indifferent shoppers and feeling some well-justified concerns about the nature of magazines' readership base.

Consumer magazines do mesh well with the needs of some advertisers, however. Specialty magazines, with their well-defined niches, can offer targeting opportunities for the advertiser willing to do careful research into consumer behavior and magazines' audience composition. Moreover, magazines' portability means that a magazine ad may in some cases be seen outside the home.

Of course, the flip side of wide title choice is that many magazines serve too small a niche to be effective advertising tools for companies wishing to reach a broad market segment. Also, some magazines' practice of clustering ads means recall of your ad may suffer unless you purchase a full-page ad — an expensive proposition.

Advantages

Readership: According to spring 2001 Simmons data, 89 percent of adults age 18 and older say they read one or more magazines.[5]

Targetability: Specialty magazines allow advertisers to target consumers demographically, by product affinity, or by lifestyle.

Strong Visuals: Magazine ads can be highly creative and aesthetically appealing through the effective use of photography, graphics, color, and copy.

Portability: Magazines can be carried by consumers and read almost anywhere, at any time (in-car being one notable exception).

Advertorial: An in-depth advertising message can be created to appear more like editorial copy than an advertisement, although most magazines require such advertorials to be identified as advertising rather than editorial content.

Localizing: Regional/local editions, polywrap inserts, and local "vista" magazines offer local advertising opportunities.

Disadvantages

Competition: There are too many magazines — and too many choices. Advertisers and consumers have nearly 18,000 magazine titles from which to choose, many of which do not survive their first year of publication.[6]

Time: The average person spends only 5 or 6 percent of his or her daily media time reading magazines.[7]

Clutter: Magazines contain so much advertising that ad readership and recall is minimal. The typical magazine contains over 50 percent advertising, so there's little opportunity for consumers to absorb both the editorial content and advertising.

Reach: The proliferation in the number of magazines means audience fractionalization, and most magazines actually miss most of their avowed target audiences. The average issue of Business Week reaches less than 3 percent of all professional managerial adults, and Good Housekeeping misses more than 86 percent of adult women[8].

Inflexible: Because of lead time, advertising must be prepared long before publication dates, prohibiting advertisers from responding instantly to changing market conditions.

Expensive: Increased distribution and production costs have forced magazines' cost-per-thousand to almost double in the past 10 years.

Plus *Radio*

Radio reaches 94 percent of all magazine readers in the average day. Although adults typically only browse through a fraction of all the titles in the rack, Radio's superior reach (96 percent of adults each week and 78 percent of adults each day) can draw attention to the magazine just for them … and your ad.[9]

Radio can break through the ad clutter found in magazines by conditioning readers to identify with — and respond to — your magazine advertising.

You can improve on magazines' low ad readership and recall scores by adding a cost-efficient Radio schedule to your media mix. This way you can extend the reach against your target consumer and build the message frequency necessary to a successful campaign.

Outdoor..

In an advertising climate marked by demographic segmentation and targeting, billboards and other outdoor ad formats champion the broad-based and all-inclusive. They're highly visible and — at least for commuters — virtually inescapable, but they are limited in the amount of detail they can convey.

Most advertising media operate in an age of ever-increasing specialization, focusing on their ability to deliver more and more narrowly defined segments of the population. Outdoor advertising, on the other hand, remains the champion of the mass media, touting its ability to reach large, undifferentiated audiences. And the industry is successful; the Outdoor Advertising Association of America (OAAA) reports estimated year-2000 billboard revenues at over $5.2 billion, the eighth consecutive year of revenue growth.[1]

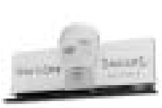
For many, billboards are synonymous with outdoor advertising. However, the category includes other types of out-of-home advertising include signage on transit and bus shelters, airport and train stations, bus and subway ads (interior and exterior), street furniture such as public benches, moving billboards, and more. Still, billboards account for more than half of outdoor ad revenue.[2]

For the first hundred years of its existence, the humble billboard itself changed little, other than to adopt a standard size around 1900. In the last decade or so, however, advancements in technology have boosted billboards' ability to attract attention.

- Vinyl overlays and computerized painting have slashed the time it takes to put up a billboard;
- Computerized lighting effects, backlighting, and digital & LED technology increase visual interest at night;
- Three-dimensional effects help a billboard's message break out of the flat realm of the mere sign; and
- Rotating panels allow three different images or messages to show in succession on a single billboard.

Of course, outdoor advertising has its drawbacks. The need to communicate a memorable message in a split second sharply limits the level of detail an outdoor ad can convey and results in relatively poor consumer recall. Additionally, many people consider billboards a visual blight on the landscape.

Tobacco advertising, a former outdoor stalwart, has practically disappeared from the nation's billboards. In the wake of tobacco's retreat, dot-com advertising loomed large in the outdoor industry's fortunes; now that the Internet and e-commerce firms fueling that ad boom have gone "boom" themselves, the OAAA reports that dot-com advertising in the first quarter of 2001 is down $7 million from first-quarter 2000. The result has been a more diversified clientele.



Advantages

Brevity: Outdoor advertising is effective for conveying brief messages and simple concepts.

Building Word of Mouth: Billboards can generate curiosity in "teaser" campaigns.

Low Cost: Outdoor's cost-per-thousand is significantly lower than that of any other advertising medium — in some cases by a factor of 10 or even 20.

Attention Grabbing: The combination of size, color, and illumination attracts attention.

Full-time Audience: Outdoor's message can appear year-round. For additional fees, outdoor advertisers can purchase evening lighting — or, in some cases, even 24-hour illumination.

Directional: Billboards can be used as directionals, pointing out the locations of a given business.

Strategic Placement: Billboards can be placed at high-traffic areas or other strategic locations, while transit signs can be affixed to the backs and sides of buses, in bus stops, and in rail stations.

Disadvantages

Brevity: The very nature of outdoor advertising demands that the commercial message be brief and relatively simple. Therefore, it is difficult to communicate product details, competitive advantages, and specific consumer benefits.

Limited Availability: Prime outdoor locations (in high-traffic areas) often are controlled by large, long-term advertisers. Construction of new billboards is restricted by costs, space availability, and rigid municipal codes and environmental regulations.

Lack of Effective Measuring Tools: Unlike other advertising media, outdoor advertising has no truly reliable method to measure its effectiveness. A few studies have been done, but they mostly apply to limited geographical areas and employ widely varying methodologies.

Low Recall: Commuters behind the wheel and other potential customers are exposed very briefly to outdoor messages, minimizing message retention. Such adverse conditions as heavy traffic or bad weather also can limit message impact and recall.

Ugly Image: Because of growing environmental concerns, many communities have eliminated, reduced, or limited the volume and placement of outdoor advertising.

Inflexible: Once a message is up, it generally stays up through the duration of the contract, even if the advertiser's needs have changed. Ads must be purchased an average of 28 days prior to showing to allow time for production and placement, which prohibits any corrections or additions that may result from changing business conditions.

Plus *Radio*

Your outdoor message can be seen only where it is displayed, but Radio allows your message to travel with your customers wherever they go — at home or at the office as well as in the car. By combining Radio with outdoor, you can build your message's range and frequency — and reach more of your customers more often.

A billboard can grab your customers' attention; Radio can give them the details. By combining these two complementary marketing forces, Radio can deliver all the information on your products and services your customers need in order to make intelligent purchasing decisions.

Bad weather and adverse traffic conditions both are known to decrease outdoor ad exposure, but Radio listening actually increases under these circumstances. American consumers depend on their car Radios for weather and traffic reports, so billboards and Radio make an effective drive-time combination.

To be effective, billboard messages must be brief. That's where Radio can help. Use Radio to enhance and expand on the message displayed in your billboard showing.

Point-of-Purchase...............

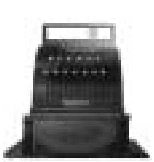
Point-of-purchase marketing has become ubiquitous in American society and has proven effective at increasing sales when properly executed. However, it is relatively powerless to bring shoppers in from the street, and its ability to target new consumers is limited.

Place-based or point-of-purchase marketing has a fine tradition, reaching at least as far back as the 1800s. In those days, cough-drop maker Smith Brothers was battling a slew of cough-drop copycats. William and Andrew Smith chose to place their distinctive bearded portraits on their point-of-purchase materials (glass bowls to display their wares and small envelopes in which the cough drops were dispensed). From such humble beginnings, the P-O-P industry has grown to touch nearly every kind of product and crops up throughout the store — wherever a shopper might be about to make a choice.

The Smith Brothers story also illustrates another principle associated with P-O-P marketing: the impulse buy. An enterprising distributor, the story goes, provided signage touting the drops' 5¢ price and told the shopkeepers, "Make sure every customer gets a nickel in change." Reportedly, the result was that many customers impulsively flipped the nickel back at the shopkeeper and bought some cough drops. This simple principle — trying to influence the consumer just before a buying decision is reached — now is applied to a host of products in venues such as grocery stores. And the numbers show that the approach works. PROMO Magazine offers figures claiming 18.1 percent growth and $17 billion in 2000 revenue.[1]

On the consumer side, there has long been little data to conclusively demonstrate P-O-P's effect on sales. Point-of-Purchase Advertising International (POPAI) set out to change that in 2001 with its groundbreaking study, "In-Store Advertising Becomes a Measured Medium."[2] This study's goal was to quantify P-O-P advertising's return on investment for supermarkets, mass merchandisers, and convenience stores. The supermarket segment of the study found that properly displayed P-O-P boosted sales anywhere from 2 percent to 65 percent.

It's important to keep in mind that there's one critical task that P-O-P marketing cannot do, and that's to bring customers into the store. What's missing is a "friend on the outside" — a component to reach shoppers before they reach the store … a perfect job for Radio.



Advantages

Placement: P-O-P advertising can be placed almost anywhere in stores — next to merchandise, on shopping bags, at the checkout counter, even suspended from the ceiling or laminated into floor tiles.

Targeted: P-O-P is most effective when it is positioned to reach a clearly defined consumer target closest to the time of purchase.

Effective: Place-based advertising directly affects sales, brand switching, portfolio purchasing, and multi-unit sales.

Influential: P-O-P advertising gives retailers the opportunity to influence consumers in a competitive environment.

Incremental Sales: P-O-P advertising can persuade shoppers to purchase additional quantities of a product, or to buy related products that are merchandised together.

Disadvantages

Limited Reach: By definition, place-based advertising only reaches that small group of consumers walking past displays, waiting at the checkout counter, or carrying their bags to the car. Moreover, studies show P-O-P marketing works best when geared toward younger, single, less-affluent shoppers.

Product-Oriented: Place-based advertising influences what products consumers may buy, but not where they will buy them. Though often effective for improving product sales, place-based media inherently are limited in their ability to attract new customers, build traffic, and improve market awareness for retail advertisers.

Consumer Perception: Many consumers report that in-store TV monitors, electronic signs, and in-store broadcasting have little impact on them as they shop (they also claim that these devices blend into the environment).

Shoppers: Only about 20 percent of supermarket shoppers browse the aisles in drugstores or discount stores; the rest completely miss promos, displays, or special signage in those stores.

Limited Targeting: Despite its key placement, general-reach place-based advertising (such as in-store television) delivers limited results and can be prohibitively expensive.

Plus *Radio*

By adding Radio to your place-based promotions, you can greatly enhance the frequency and impact of your campaign. Radio reaches consumers everywhere — at home, in the car, at work, and on the street. On weekdays, 78 percent of U.S. adults age 18 and up listen to Radio an average of more than three hours per day.[3]

Radio is a synergistic companion to P-O-P advertising. If you want to promote a specific product or service, Radio can deliver the customers you want and even offer on-site broadcasts that are proven marketing winners.

By using a combination of Radio and P-O-P advertising you can "sell the store" as well as increase average unit sales.

Place-based media targets highly likely potential prospects … and Radio will expand the targeted reach and message frequency of your program. Because each format attracts a specific segment of the population, Radio can help you influence your best prospects effectively and efficiently by age, gender, race, income, and lifestyle.

Alternative Newsweeklies...

Proud of their self-perceived role as watchdogs of the local daily newspaper, alternative newsweeklies attract a young, hip audience. However, their liberal ad policies may leave a mainstream advertiser "lost in the wrong part of town," surrounded by ads for liquor and adult businesses.

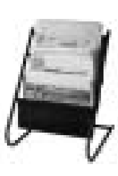
Nowadays, most markets are served by just one daily newspaper with no real competition. Moreover, the editorial content of many of these papers is one that leaves younger people feeling disenfranchised. Enter the alternative weekly.

Many weeklies consider themselves watchdogs dedicated to keeping an eye on the daily's actions as well as news outlets for stories not covered by the major papers. Indeed, alternative weeklies frequently are characterized by hard-hitting (some might say borderline muckraking) investigative journalism and editorial content with an intensely local focus.

According to the Alternative Weekly Network, the typical newsweekly reader is:

- Male (52 percent)
- Single (47 percent)
- Young (40 percent are aged 18-34; nearly three quarters are aged 18-49)
- Affluent (Average household income tops $50,000)
- Twenty percent more likely than average to be a college graduate
- Thirty-four percent more likely to be in a professional or managerial job.[2]

As part of their reputation for catering to the young and hip, many alternative newsweeklies have much more liberal ad-acceptance policies, welcoming advertisers such as hard-liquor and tobacco companies — even adult-oriented businesses — that often have difficulty finding a place in other media. However, the result of this open-handedness is, as one might expect, a glut of ads for massage parlors and spirits manufacturers... an image that many mainstream advertisers may not want to be associated with.



Advantages

Distribution: Weeklies usually are distributed free throughout a city.

Pass-along Readership: Because most are free, readers often leave them behind when they're done — to be picked up and read by someone else.

Hip Image: Many newsweeklies are targeted to hip, youngish readers who rarely look at daily newspapers. In particular, the local newsweekly is the source of choice for entertainment news among young demographics.

"Budget" Print Ads: An ad in a newsweekly offers many of the same characteristics as a newspaper ad, at rates that are usually lower than those of the local newspaper.

Accepting Ad Policies: Ads for categories that may have difficulty finding a home in other media, such as liquor or tobacco advertising, are usually welcome here.

Disadvantages

Advertising Environment: The flip side of newsweeklies' openhanded ad acceptance policy is that the environment created by certain types of ads may not be suitable for mainstream businesses or products.

Limited Publication Schedule: The name "weekly" says it all. The majority of these publications are produced only once a week — and that may not be often enough to achieve sufficient message frequency.

Production Quality: Although some weeklies boast production values rivaling or even surpassing the local newspaper, many others are produced as cheaply as possible, resulting in a "cheap" look that may affect consumer perception of the quality of product or service being promoted.

Narrow Appeal: Weeklies' appeal among younger demos may be fine if that's the target audience. However, advertisers seeking consumers who are older — and have more disposable income — may not find a good match here.

Inflexible: To meet the weekly's schedule, ads usually must be locked in as much as a week or more in advance, limiting an advertiser's ability to introduce copy changes.

Ad Clutter: Most weeklies rely completely on advertising for revenue, so the typical issue is crammed with ads, often clustered together in groups. This practice can make it difficult for a given ad to stand out.

Plus *Radio*

Radio and alternative weeklies share many characteristics. Both have ties to the local community, both have loyal followings and a unique bond with their constituents, leading to highly synergistic possibilities.

Radio can be used to drive readers to print ads, increasing recall and effectiveness.

Clubs with live music, record labels, music stores … all of these core alternative-weekly advertisers can benefit from a cross-media campaign featuring the ultimate music-friendly advertising medium: Radio.

Recruitment advertising can be particularly effective when the campaign includes both Radio and print. With Radio to reach currently employed potential applicants on the job and an alternative-weekly classified ad to follow up and provide detail, you'll attract a better class of employee.

Yellow Pages..............................

While considered by many as a good source of reference, the Yellow Pages do not bring advertisers the benefits provided by other more "proactive" media. Lack of competitive separation, inflexible publication schedules, and limited reach to today's "on-the-go" consumer combine to limit this medium's effectiveness as a modern marketing vehicle.

For more than a century, Yellow Pages advertising has been has been a significant part of the advertising equation. Despite this longevity, however, the medium has not been immune to recent changes which affect its ability to deliver predictable results for advertisers.

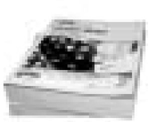
It is no longer accurate to speak of "the Yellow Pages" as if it were one coordinated entity. The Yellow Pages Publishers Association (YPPA) lists more than 6,000 directory titles and many metropolitan areas now have several versions of the Yellow Pages competing for usage.[1]

A particularly important development in the Yellow Pages industry is the availability of syndicated, objective, third-party research to track and rank Yellow Pages usage. NFO AD:IMPACT supplies ratings to the industry, with coverage of most major U.S. markets.

Advances in printing technology not only have improved artwork reproduction, but also enabled the use of color in ads to a degree far beyond the traditional red accents.

While the Yellow Pages perform well as a reference tool, they fare less well when considered as a proactive advertising medium. For one thing, consumers expect advertising clutter when consulting the Yellow Pages — one study revealed that two-thirds of respondents felt their directories carried "just the right amount" of ads, and an additional 12 percent wanted to see more advertising![2] This ad clutter may suit shoppers, but it also exacerbates the difficulties in having an ad message stand out and truly seize attention. The YPPA states that half of all visits to the Yellow Pages are made by people who have yet to choose a brand/supplier and who read multiple advertisements. In such cases, it's a matter of chance whether the prospect picks your ad.[3]

Perhaps most significant, Yellow Pages publishers are facing competition from "electronic Yellow Pages" on the Internet. These companies' directories offer such features as user-customizable listings, real-time updates of advertiser information, precise tracking of who accesses an ad, and more — features that the traditional print book can't match.



Advantages

Widespread: Almost every home in America (96.9 percent) and business has at least one copy of "the book."[4]

Usage: Almost three out of five (58 percent) of all adults say they check the Yellow Pages for a phone number and/or address at least once per week, with 76 percent using the book monthly.[5]

Reference Tool: The Yellow Pages serve as a directional reference for consumers who already have decided to purchase a product or service; of the consumers who use the Yellow Pages, 50 percent do not know from which store or business they will buy prior to looking in the directory.[6]

Emergency Reference: Consumers often rely on the Yellow Pages during emergency situations.

Targets Consumers: Ads primarily target consumers already interested in purchasing your product or service.

Disadvantages

Limited Exposure: Just over half of U.S. adults 18+ refer to the Yellow Pages in the average week. The other 42 percent will not see your ad.[7]

Minimal Consumer Awareness: Since the Yellow Pages typically are consulted after the decision to buy has been made, top-of-mind awareness must be built in other ways. As products continue to proliferate and the retail market becomes saturated, you must create demand for your products before the buying decision has been made.

Ad Clutter: Your ad is lumped in with all the others for the same product, where shoppers can compare.

Inconvenient: Phone books tend to be big! They're bulky, hard to store, and not readily available to consumers outside of the home or office. Their availability is limited in the locations where most purchases are made. How many pay phones have you seen that have a complete phone book? (Indeed, as mobile phones proliferate, how many people even use phone booths anymore?)

Inflexible: Most directories are published once a year, and advertising must be purchased well in advance of the publication date. You can't make corrections or changes resulting from dynamic business conditions or new opportunities.

Too Many Books: In many communities there are several different directories all soliciting for your listing. Who reads them all? Who needs them all?

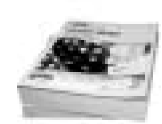
Encroaching Competition from the Internet: Yellow Pages-like services on the Internet are springing up; their supporters promise a more logical organization of data and the capability to update information more often.

Plus *Radio*

The combination of Radio and Yellow Pages can work more effectively to reach, motivate, and inform your customers. Radio can create demand and influence buyers before they decide to buy, and the Yellow Pages can reinforce where they should buy once they have decided to do so.

Radio's great flexibility lets you make copy revisions at your discretion to accommodate changes in your business. You're not stuck with the same ad for more than a year, you increase your creative options, and you can generate maximum impact when you combine Yellow Pages with Radio.

While your competition is content with advertising only in the Yellow Pages, you can increase your top-of-mind awareness through Radio — and greatly increase your market share. Radio can help you communicate the unique selling proposition of your business and help draw attention to your Yellow Pages ad instead of those of your competitors.



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