



Personal Relevance, Personal Connections

How Radio Ads Affect Consumers

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EXECUTIVE SUMMARY

- Radio listening is a one-on-one and emotions-driven experience, and listeners believe that both the medium and its advertising are more *relevant* to them (compared to television and newspapers).
- Consumers see television and newspapers as being designed to satisfy the masses, but radio is where they turn to get gratification of their *personal* wants and needs.
- Consumers believe that their radio programs carry ads which are appropriate for them as individuals, and listeners are therefore more ready to react at an *emotional* level—if the advertisement is well suited for that program’s context.
- The ability of radio advertising to make personal, emotions-driven connections with listeners helps explain *why radio can be so effective* when the advertising is done well and placed appropriately.



In this new RAEL study, the most distinctive media perception we saw among consumers 18-54 is that radio’s value to listeners comes from its satisfaction of very personal wants and needs, and as a result, radio listening is very connected to a listener’s emotions. That carries over to their perceptions and their expectations of radio advertising. Radio ads are perceived as (and expected to be) more *relevant* to the listener than are those in television or newspapers, and radio ads are therefore fully capable of tapping into emotional responses.

That has important implications to advertisers. While television viewers and newspaper readers expect that there will be many ads which aren’t of interest to them, radio listeners see the ads as being more appropriate and meaningful to them as individuals. That leads to an *expectation* that advertisers will target their content and their creative to the specific listeners of that program. It also means planners need to use the right environments for their messages; appropriate targeting is necessary for effectiveness.

For broadcasters, it means that the ads they sell are an important part of the listener’s experience. Listeners expect the ads to “fit,” and inappropriate ads cause dissonance—with likely negative effects on satisfaction with the programming as well as on ad effectiveness. In seeking advertisers, and in helping advertisers create ads, broadcasters need to consider environmental compatibility, too.

Overall, our study suggests that the radio ad message (much more than for television or newspapers) has to be consistent with its surroundings. Consumers understand that many TV and newspaper ads won’t be relevant to them, but they bring different expectations to radio. They’re expecting “my ads” on “my station.”

Other implications include: More focus on the emotional content of radio ads; less simple duplication of content from ads in other media; and, possibly, more testing of radio ads in advance.

PURPOSE & METHOD

WHY WE DID THIS STUDY

The Radio Ad Effectiveness Lab (RAEL) is an independent nonprofit organization which seeks to better inform the media marketplace about how radio advertising works. With funding from the radio industry, RAEL works with numerous advertisers and agencies on its Research Committee to create and disseminate new and existing research on radio.

This RAEL *Research Report* is the first in a series which summarizes our new primary research on radio.

During 2004 and 2005, RAEL is funding several large-scale new studies about radio. This first report concerns a project conducted with WirthlinWorldwide to better understand how radio advertising affects consumers in ways that are different from television and newspapers.

As we've learned since our founding in 2001, there are many ways to look at "effectiveness," and there are a multitude of factors which can affect advertising outcomes. As a result, we are funding several different new pieces of research in 2004 and 2005 that examine radio ads in different ways.

One of the more challenging issues concerns the "how" of radio advertising. It's one thing to demonstrate that radio *can* be effective; it's another to help advertisers know *how* to assure effectiveness in their radio campaigns.

What is clear (as we summarized in *RAEL White Paper #3*, at <http://radioadlab.org/whitepapers.htm>) is that there is a wide range of effectiveness across different campaigns.

The average radio ad tends to have about 80% of the recall power of a single television ad (at much less cost), which makes for excellent Return on Investment.

But we also know that there's a big difference between the best radio ads and the weakest. That suggests that the ROI for radio advertising could be even better—if only we knew the magic formula for creating and scheduling *good* radio ads.

Out of that concern grew the current study, which we believe can provide useful guidance to advertisers pondering the "how" of radio advertising.

HOW WE DID THIS STUDY

In response to a Request for Proposals issued by RAEL in Fall 2003, the research firm WirthlinWorldwide (WW) proposed the present study. In general, WW proposed to use their expertise in brand mapping to better understand how consumer perceptions of radio advertising might differ from those of TV and newspaper ads.

The details of the methods we used in this study are contained in [Appendix B](#) (Detailed Methodology). For now, here's a capsule summary.

TWO PHASES

RAEL conducted the research in two phases (Figure 1)—a qualitative first phase to understand the values and benefits lexicon used by consumers in discussing media and advertising, and a quantitative structured survey to better quantify the architecture of consumer relationships to advertising.



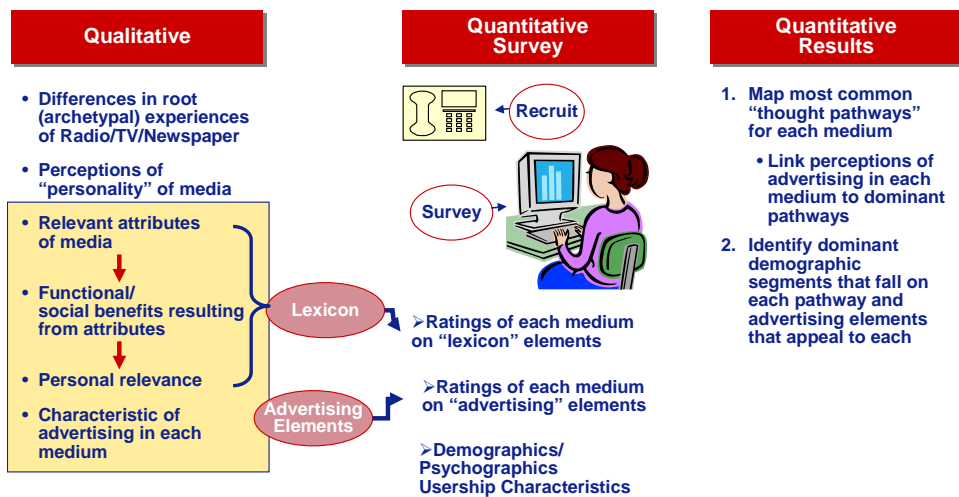


Figure 1

SAMPLING

While Phase One was conducted in focus group facilities using typical sampling for such interviews, Phase Two was designed to be as projectable as possible. We used a high-quality Random Digit Dial sample frame for Phase Two, and applied relatively rigorous techniques to optimize cooperation with the study (as described in [Appendix B](#)). This paper will focus exclusively on the Phase Two results.

For this initial study of consumer perceptions, RAEL decided to focus on consumers aged 18-54, and for Phase Two, we sought a completed sample of 600 adults. We achieved a total of 662 completed and usable questionnaires. We believe that this sample size will give us a good handle on general patterns of advertising perception, but we acknowledge that we may want to do additional studies in the future to better understand more narrowly defined populations.

THE PHASE TWO SURVEY

Half the sample was queried about their radio and television perceptions; for those, we screened out the very lightest radio and TV users. The other half of the sample had radio and newspaper questions in their survey, and those were screened for at least some radio and newspaper usage.

After recruiting and screening our respondents on the telephone, we offered them a choice of taking the survey on the Internet or via a printed questionnaire in the mail. About 80% of the Phase Two completions came from Internet surveys.

The Phase Two questionnaire took about half an hour to complete. The structure began with general questions about each of the two media in that version of the questionnaire. Respondents were asked to focus on a particular experience with one medium, and were then asked to rate the importance of various attributes of that experience.

Respondents then rated the appropriateness of various statements about the benefits received from that medium, followed by statements about emotions experienced with the medium. The next section rated whether or not the medium allowed the respondent to experience different feelings classified as “values” by Wirthlin.

Finally, the respondent was asked to focus on *advertising* within each of their two media. The questionnaire presented an extensive list of advertising-related statements, and participants were asked which of the two media was better associated with each statement.

Of course, the survey concluded with standard classification questions, including age, gender, marital status, employment, household income, education, and race/ethnicity. We also included some basic questions about the amount and nature of daily media usage.

THE ANALYSIS

In brief, the Phase Two analysis focused on two issues.

First, we wanted to quantify the perceptions that consumers associate with radio as a medium, and to contrast those perceptions with the values for television and newspapers. This analysis developed “maps” of how the different variables were related to each other.

Second, we wanted to contrast perceptions of radio advertising with those for television and newspaper.

Here’s what we found.



THE RESULTS

While the questionnaire structure began with perceptions of each medium in general, and then progressed to evaluation of advertising per se, we’ve found that the results are most understandable if we

begin with the discussion of advertising. Once we examine how perceptions of radio ads compare to those for television and newspaper, we’ll then dig into the general media perceptions for greater understanding.

The advertising section of the questionnaire included a battery of questions that compared advertising on two media (radio vs. TV, or radio vs. newspapers). For example, respondents were given a list of statements like this:

“I feel like the ads are directed more toward me personally”

Respondents were then asked to rate that statement on a scale of 1 to 7, where 1 meant “associate more with television” (or newspapers), and 7 meant “associate more with radio.”

Averages were then computed for each question. Average scores *above* a value of 4.0 represent statements associated more with radio, while any scores *below* 4.0 would be associated more with the other medium.

RADIO ADS VS. TV ADS

First, let’s see which statements were most associated with radio when the comparison was to television.

		Mean (rated on scale of 1 to 7)		
		1	4	7
		Associate more with Television	Associate with both equally	Associate more with Radio
<i>Radio is associated more with...</i>				
Ads	Ads make me feel more connected to my community			5.2
	Advertisements in this medium are more honest			4.8
	The advertisements are concise			4.6
	I feel like the ads are directed more toward me personally			4.4
	Advertisements in this medium are reliable			4.3
	I am more likely to trust the advertising in this medium			4.2
Consequence/ Benefit of Ads	I get more exposure to advertisements for local products and services			5.3
	I can do other things while absorbing the advertising in this medium			5.1
	I am more likely to trust the advertising			4.3
	Provides me with last minute info about products/service before I shop			4.2
	More likely to get a good deal on the products/services that I purchase			4.1
	I’m less likely to waste money buying products/services that I don’t want			4.1
Advertisers	Advertisers who use this medium care more about reaching me personally			4.7

Figure 2: Radio Ad Strengths vs. TV Ads

As you can see in Figure 2, the consumers in our study rated radio ads more highly than television ads on a number of dimensions.¹

One of the most intriguing patterns was a sense of *personal relevance*, as seen in statements like:

- “...directed more toward me personally...”
- “...care more about reaching me personally...”
- “...more connected to my community...”
- “...more likely to trust...”

Radio’s *local* nature also shows up in the high ratings for the statement, “I get more exposure to advertisements for local products and services.”

To us, this pattern is significant. **When compared to television ads, radio ads are seen as being more personally connected to the consumer.**

We also see the beginning of another theme, concerning **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.

(Another interesting finding on a side issue: We were struck by the high rating for radio on the statement, “I can do other things while absorbing the advertising in this medium.” It occurred to us this consumer perception is actually an asset—that radio is able to penetrate times and places that are not accessible to other media.)

We saw a similar pattern of personal connectedness when radio ads were contrasted with those in newspapers.

RADIO ADS VS. NEWSPAPER ADS

We asked a related battery of comparative questions of those respondents surveyed about radio and newspapers. The issue of personal relevance shows here too, at least as strong as for television (Figure 3).

¹ Additional data from this study may be requested from RAEL at RAEL@RadioAdLab.org.

		Mean (rated on scale of 1 to 7)	
<i>Radio is associated more with...</i>		1 ←	→ 7
		Associate more with Newspapers	Associate with both equally
			Associate more with Radio
Ads	Advertisements are fun		5.6
	Advertisements are creative		5.3
	The advertising in this medium is more interesting and engaging		5.1
	Advertisements in this medium are intrusive		5.1
	I feel like the ads are directed more toward me personally		4.9
	Ads do a better job of reaching the people they are meant for		4.9
Consequence/ Benefit of Ads	I can do other things while absorbing the advertising in this medium		5.7
	The advertisements are more likely to hold my attention		4.6
	Remember ad longer because ads in this medium have more impact on me		4.6
	These advertisements are more likely to open my mind to new ideas		4.2
Advertisers	Advertisers who use this medium are trying harder to reach me		5.0
	Advertisers who use this medium care more about reaching me personally		4.4

Figure 3: Radio Ad Strengths vs. Newspaper Ads

Our theme of Personal Relevance for radio advertising shows up in comparisons like:

- “...directed more toward me personally...”
- “...better job of reaching the people they are meant for...”
- “...have more impact on me...”
- “...trying harder to reach me...”
- “care more about reaching me personally...”

Clearly, consumers see radio advertising as being more connected to them as individuals, and more relevant overall, than is newspaper advertising.

We see some emotional threads running through the statements associated with radio as well.

Of course, there are other interesting findings here, including a reminder that radio ads can’t be escaped as easily as newspaper ads. In addition to the statement above about intrusiveness, we saw a similar pattern on a different question, where newspaper ads scored a 2.8 (strongly associated with newspapers) on the statement, “I have control over which advertisements I pay attention to.” Consumers may

like that “feature” of newspaper ads, but it’s an important reminder for advertisers.

SUMMARY: AD PERCEPTIONS

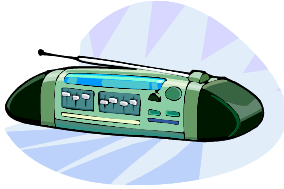
It seems clear that radio advertising is perceived as being more relevant to the consumer, and more personally connected, than ads on television or in newspapers. And because of that more-personal connection, radio ads trigger emotional reactions among consumers.

That makes intuitive sense, we believe. Radio is the medium people choose for themselves, and radio programming is usually targeted to very specific groups of people. What we’ve discovered so far is that the personalization of radio formats carries over to the perceptions of radio ads. In simple terms, people believe that “my station” carries “my ads.”

We’ll come back to that point. But for now, we’ll simply note that the personal relevance of radio ads is a double-edged sword—that perception is both a benefit of radio *and an expectation*. Radio provides an ad environment which is conducive to reaching people at a very personal and emotional level; but, if the ads are *not* reasonably relevant to the audience for that programming, they may be resented.

Advertisers need to keep this expectation of personal relevance in mind when creating and placing their ads.

To better understand how radio ads can have this personal connection, we'll now take a look at the study's results that pertain to each medium in general.



RADIO AS A MEDIUM

The first step in our analysis of each medium was to look for clusters and patterns in the responses to our general media questions. We asked questions about values, emotional consequences, functional consequences, and attributes for each medium,² and we wanted to see which answers were the most common, and how they related together.

To build this “map” of perceptions about each medium, Wirthlin first used cluster analysis to identify which variables seemed to be measuring related factors. These clusters were common across media, but the relative importance of each varied significantly.

Values:

- Accomplishment
- Contentment
- Caring connection to family

² Specifically, we asked about whether these characteristics applied to the specific media exposure which was recalled at the beginning of the questionnaire.

Emotional Consequences:

- Succeed
- Personal satisfaction
- More connected

Functional Consequences:

- Enhanced performance
- Enlightened perspective
- Heightened senses
- Enhanced my mood
- Enhanced social relationship

Attributes:

- Portable
- Relevant information
- Broad audience
- Easy access/choice

Each of those clusters represents a group of questions which probed different aspects of a particular issue.

Then, for each of those clusters, we considered:

- Reach: How *often* each type of response was given for each medium.
- Relevance: How *important* each of those clusters was for our respondents.
- Relationship: How the different clusters *related* to each other, especially across the values, consequences, and attribute categories.

That analysis allowed us to plot “pathways”—related groups of values, consequences, and attributes. That approach yields a detailed picture like the one below (Figure 4):

Issues Architecture Model Radio

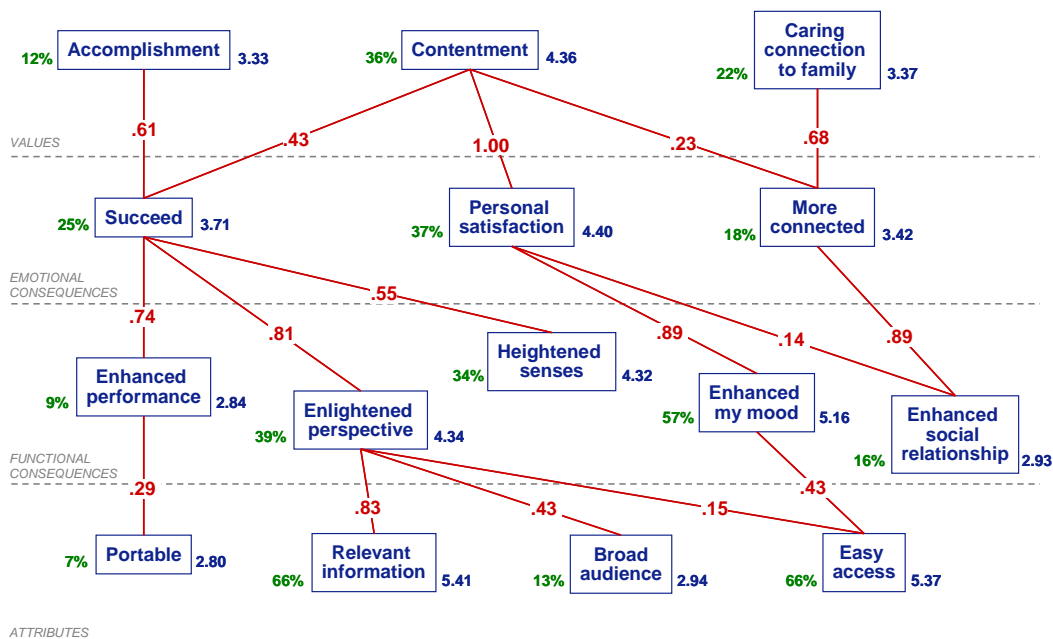


Figure 4: Radio Architecture Overall

Each text box (in blue) represents a cluster of related variables.

The percentages to the left of each box (green) represent the incidence of these clusters within our sample.

The numbers to the right of each box (blue) represent the average importance score for this cluster of variables, with higher numbers representing greater importance.

And the lines and numbers which connect the boxes (red) represent strong relationships between clusters of variables. The larger the number, the more likely it was that the same people cited both clusters.

To assist in the interpretation, Wirthlin recommended that we focus on the strongest pathways—the combinations of values, consequences, and attributes which were the most common and the most important to our respondents. While there are different ways to weight the relative contributions of the incidence, importance, and relationships, we'll focus next on the pathways that clearly loomed largest.

RADIO PATHWAY #1:

The first strong radio pathway among our variables is one which shows **the importance of mood enhancement and personal satisfaction**—two of the more important themes in our findings:

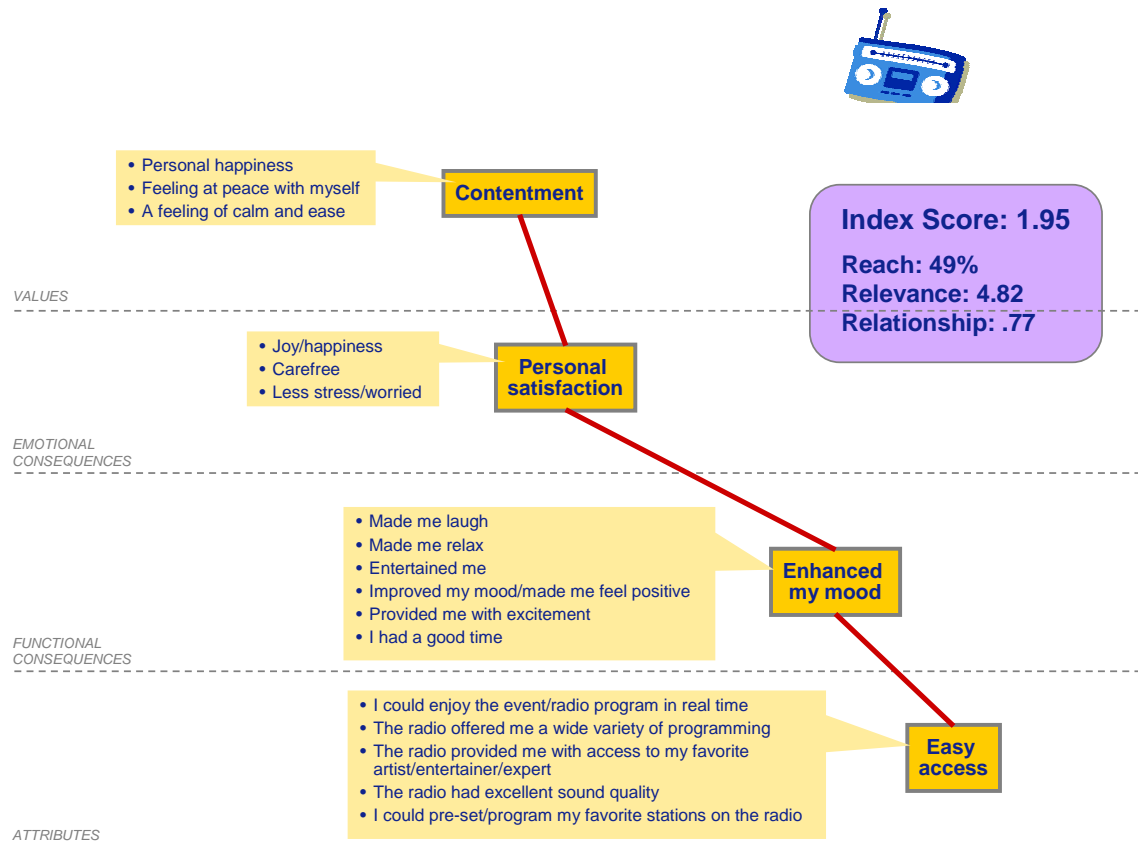


Figure 5: Radio Pathway #1

Figure 5 replicates a part of the prior Figure, focusing here on just one pathway through the grid. This series of connections from values and consequences to attributes represents a particularly strong set of relationships expressed about radio by our respondents. (Wirthlin summarizes the strength of this pathway with an “Index Score,” which is simply one way to average the combined strengths of reach, relevance and relationship.)

This is the another look at one of our key conclusions—that radio is a *personal* medium. The cluster of questions labeled “Easy Access” represents, in part, the importance of *personal choice*—of access to favorite artists and favorite stations at a time of the consumer’s choosing.

That, in turn, leads to emotionally satisfying experiences and moods—happiness, relaxation, entertainment, lack of stress, and ultimately, of contentment.

This pattern makes sense, of course. Radio has long been about the targeting of narrowly-defined groups and about consistency of programming, so it’s not surprising that consumers have their own version of that concept.

But as we’ll show over the course of the next few pages, this linkage of *personal relevance* and *personal emotions* is a distinctive characteristic of radio when contrasted with television and newspapers.

That’s not to say that this pathway is universal. While it’s one of the stronger sets of relationships in our data, it does show up most strongly for certain types of people:

- Young people ages 18 to 24 are more likely to fall on this pathway
- More likely to be single (never married)

- Less likely to have any children
- Slightly more likely to be of Hispanic descent
- More likely to have lower incomes (<\$20,000)

RADIO PATHWAY #2

Another strong pathway through our data represents radio's ability to provide timely information. We see a relationship between receiving news and information, and experiencing feelings of enlightenment, success, and accomplishment in the following illustration:

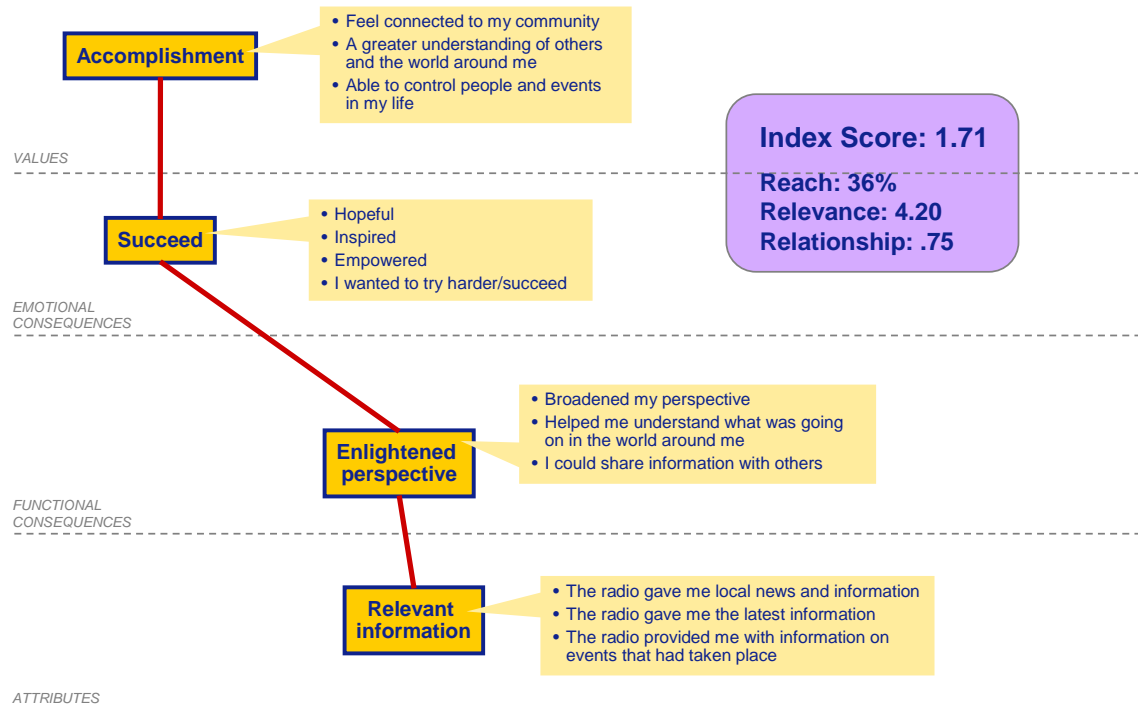
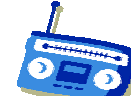


Figure 6: Radio Pathway #2

This pathway also occurs for television and newspaper, so later in this paper, we'll dig a little deeper to see if the pathways are identical. For now, let's simply note that this information-related set of attributes includes an emphasis on *local* news and information; it also includes some *personal* benefits, including "broadening *my* perspective" and feelings of personal empowerment.

Here, too, the pathway isn't really universal. It tends to occur most often among the following types of people:

- Slightly more females

- More likely to be married
- More likely to have higher incomes (\$80,000+)
- Highly educated – more likely to have post graduate degrees

RADIO PATHWAY #3

There's a related pathway based on information access, but this has a little different value set associated with it:

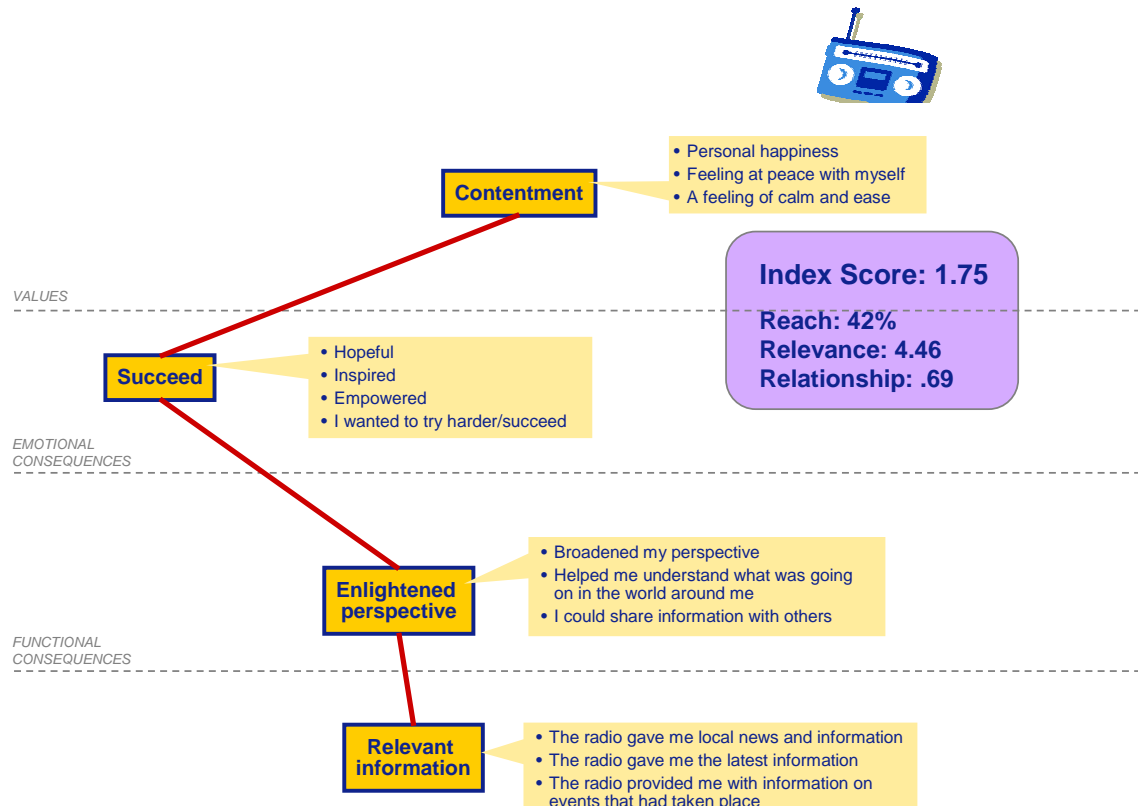
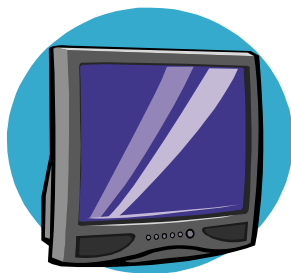


Figure 7: Radio Pathway #3

While the third radio pathway (Figure 7) is also related to the acquisition of news and information, this set of relationships indicates a linkage to more personal feelings—contentment and calm. *This* relationship is much stronger for radio than for TV or newspapers.

Again, we see that radio usage is especially connected to personal wants and needs.



TELEVISION AS A MEDIUM

To make the nature of radio a little clearer, let's take a comparative look at television. The full TV Architecture Model is presented in [Appendix A](#); for now, let's zero in on one of the key differences between the TV and radio models.

TV PATHWAY: SOCIABILITY

One strong pathway showed up for TV that seems to be unique to television—a connection between broad-audience programming and social feelings and experiences (Figure 8):

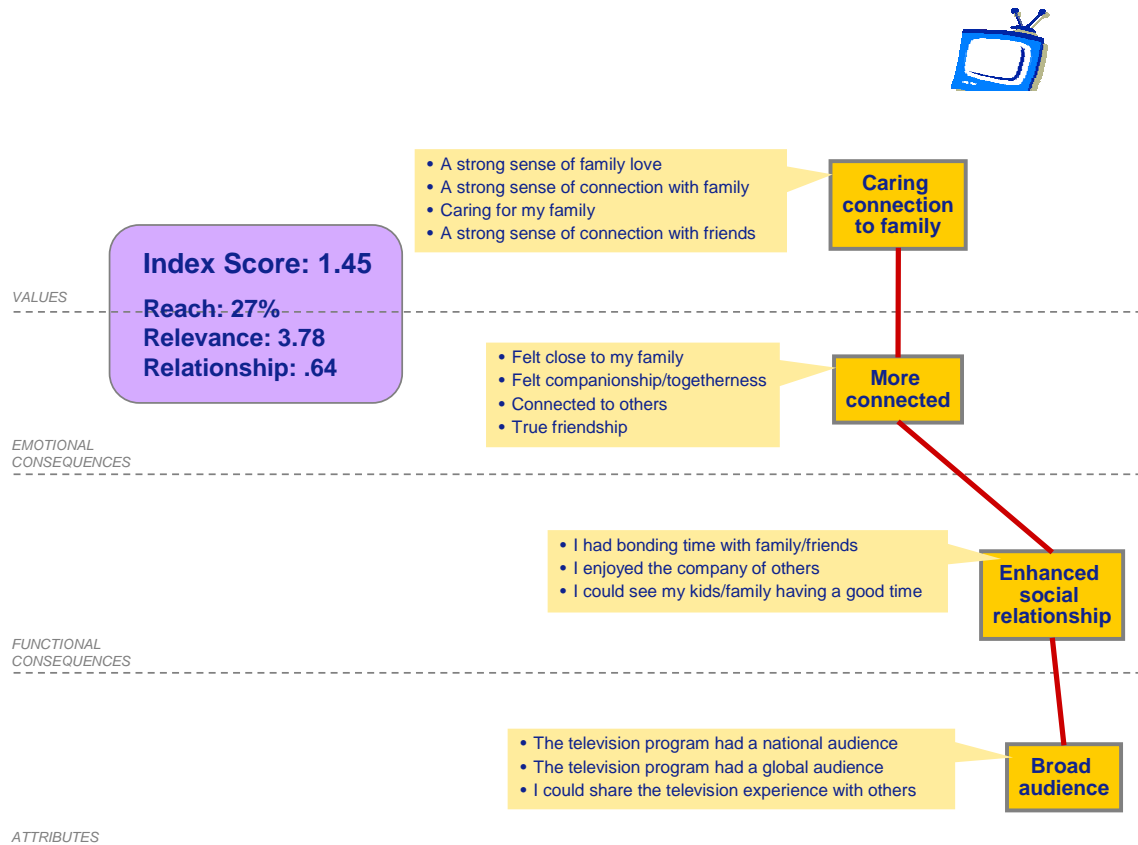


Figure 8: Television Pathway

Clearly, TV audiences perceive the programming as being broad in nature, vs. the more targeted, more personally relevant programming of radio. And that means TV triggers more social (and less personal) emotions.

Of course, the fact that television triggers more group-oriented, less personal reactions than radio isn't necessarily a bad thing. But it does help explain why radio makes relatively strong emotional connections with consumers.



NEWSPAPERS AS A MEDIUM

As with TV, the full motivational map is presented in [Appendix A](#).

For newspapers, not surprisingly, the strongest pathway concerns information retrieval, and the intellectual benefits of that exercise (Figure 9):

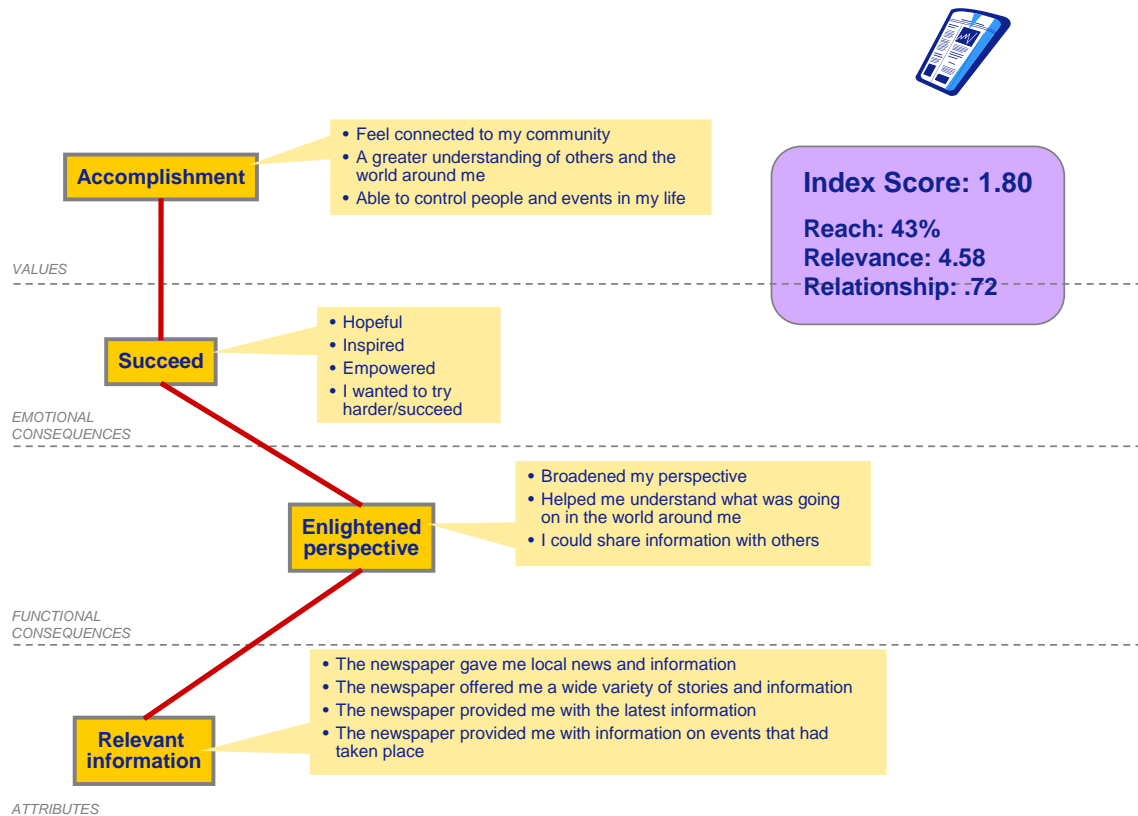


Figure 9: Newspaper Pathway

On the surface, this dominant pathway for newspapers resembles Pathway #2 for radio. It focuses on the reactions triggered by the acquisition of information of various types. However, as we'll see in the next section, the internal structure of this pathway is different from radio's.

CONTRASTING THE PATHWAYS

In a broad sense, the three media share some attributes. All three can be sources of information; radio and television can both provide mood enhancement. Since some of the pathways showed up to some degree in multiple media, we decided to dig deeper into the drivers of each pathway.

In Wirthlin's approach to creating pathways, they rank contributing variables on the strength of the

contribution to the overall factor. For example, while the "Accomplishment" factor shows up for all three media, the specific questions which drove those factors can be different across media.

Wirthlin uses the following terminology:

- "Drivers": The strongest contributors to the presence of a factor (i.e., the specific questions which were most important in that group).
- "Definers": The next strongest contributors to each factor.
- "Others": The rest of the questions which comprise that factor.

When we look at the data that way, we see that the underlying components of otherwise similar pathways can be quite different. Here's a look at exactly what drove the factors for the information-oriented pathway:

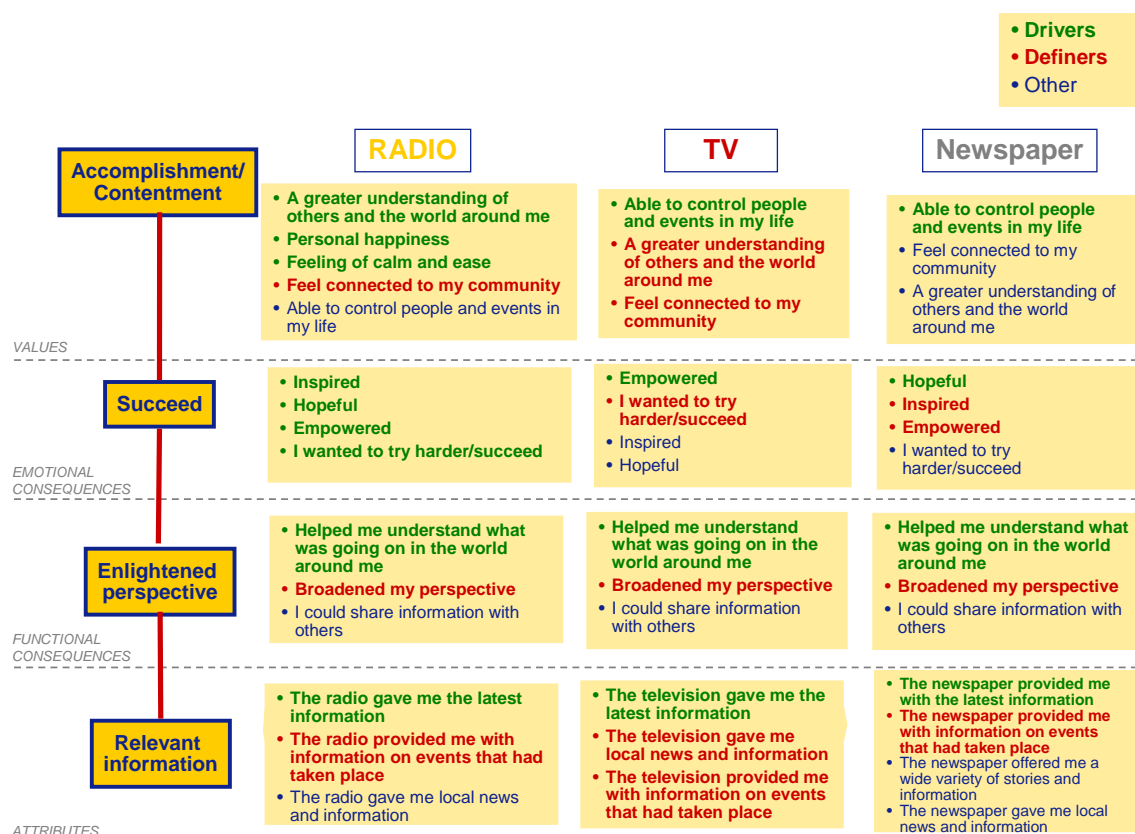


Figure 10: Drivers/Definers for Accomplishment Pathways

In Figure 10, the strongest contributors to the pathway—the “drivers”—are marked in green, and appear at the top of each list-box. And here’s where we see how radio’s perceptual pathways are dominated more by personal emotions and connections, even for the most information-oriented pathway (Radio Pathway #3).

For example, for the information-based pathway, radio reactions include strong perceptions of “personal happiness” and a “feeling of calm and ease.” Neither of those variables contribute materially to the TV or newspaper pathways.

Similarly, we see how radio triggers emotions like “hopeful” more than TV, and “inspired” more than newspapers.

Once again, we see how radio connects with personal emotions as much or more than other media.

Let’s take another example of a shared pathway. Both radio and TV yielded an entertainment-driven

pathway, in which mood enhancement was linked to personal satisfaction (Radio Pathway #1). This pathway was not notable for newspapers.

So let’s dig below the surface for radio and TV:

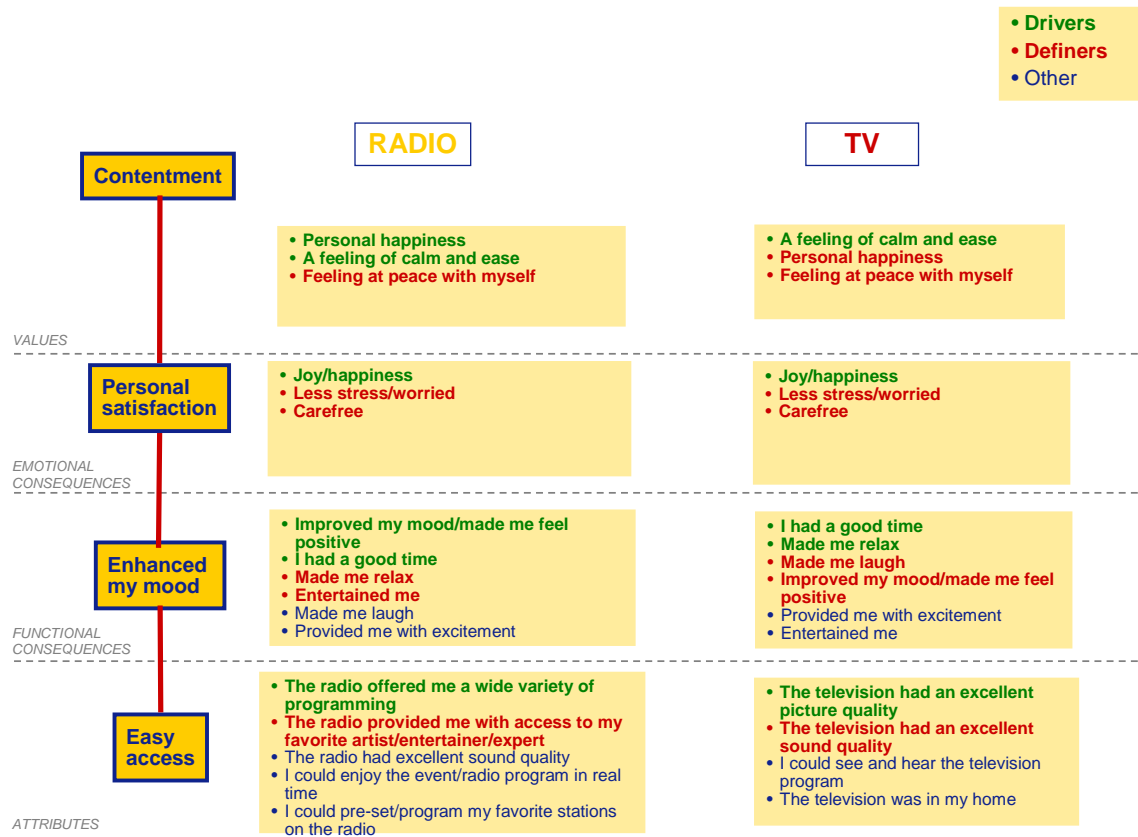


Figure 11: Drivers and Definers, Mood Enhancement and Satisfaction

While this pathway is present for both radio and TV, it's clear from Figure 11 that the underlying mechanics are somewhat different.

Radio's pathway derives more from "personal happiness" than does TV's. And functionally, radio "improved my mood/made me feel positive," which was less significant for television.

Thus, even for pure entertainment value, **radio reaches people at a more personal, emotional, and relevant level.**

WHAT IT MEANS FOR ADVERTISERS

Now that we've looked at how consumers perceive advertising on each of the three media in this study, and now that we've probed deeply into perceptions of each medium individually, we can start tying this all together into advertising implications. We think these are the major themes.

1) The personal nature of the radio medium is also reflected in the expectation that radio advertising is directed personally to the listener, and that radio advertisers are “trying to reach me personally.”

Why is this important?

Consumer expectations that radio advertising will be more personally relevant to them presents both an opportunity and a challenge for advertisers.

The opportunity is that the expectation creates receptivity to messages that do speak personally.

The challenge is that consumers will be less tolerant of advertising that is not relevant.

This has some specific implications for the planning and creation of radio advertising:

- Radio ads, more than for other media, need to be compatible with their surroundings. There is no one-size-fits-all ad for radio (at least not one that's *effective*) and format-specific advertising matters.
- Radio ads need to speak to people at a personal level, not as a group. Consumers expect television and newspaper ads to try reaching a large population, but radio ads need to speak to the individual.
- While radio can be used to provide synergy with advertising on other media, that doesn't mean that radio ads can simply duplicate the content or style of the other medium. *Effective* radio communication requires an approach that is more personal.

- Even a conscious effort to achieve “imagery transfer”—using radio ads to reinforce images from other media—needs to consider that consumers want and expect a more personal, more relevant approach.
- And because radio ads work differently than those in other media, advertisers would be well-served by the use of more radio commercial pretesting to make sure the message is appropriate to the medium. (See our separate publication, the *RAEL Guide to Commercial Testing Services for Radio* at our website, <http://radioadlab.org>.)

2) Radio reaches people at an emotional level at least as well as television, and much more than newspapers.

Why is this important?

It's widely acknowledged in the advertising community that it's no longer enough to present consumers with product/service attributes and benefits. To be truly motivating, advertising must include an emotional appeal. The tendency of radio listeners to interact with the medium on an emotional level represents a great opportunity for advertising to leverage that emotional receptivity.

This observation may also suggest something about “production values” in radio advertising. Elaborate production may be less important than having the right message—the right conduit into personal relevance and emotions.

These findings about emotion may come as a surprise to some; radio has not historically been thought of as the medium for emotional connections. But the consumers in our study made it clear that personal satisfaction, personal relevance, and personal emotions are all a significant part of their radio experiences—including their connections with advertising.

Clearly, television isn't the only medium with an ability to trigger ad reactions of an emotional nature.

3) Given how strongly people identify with “their” stations (and “their ads”), radio's ability to be effective, and to generate excellent ROI, shouldn't come as a surprise.

The fact is, radio makes personal, emotional connections with listeners, and that's a very powerful environment for an advertiser. RAEL has other studies in the pipeline to better quantify radio's ROI for advertisers. For now, though, we have some objective indicators of *why* radio can be so effective—when it's used properly.

WHAT IT MEANS FOR BROADCASTERS

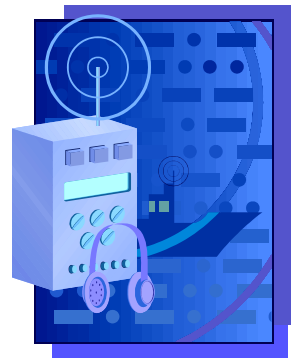
Just as environmental compatibility is crucial for advertisers, so too should broadcasters factor these findings into their regular activities. These findings are relevant to both the selling and the creating of radio ads by broadcasters.

1) Programming and advertising are part of the same experience for listeners. Some of radio's power as an ad medium comes from listeners believing that the ads will be relevant to them, and that sets the stage for personal, emotional connections. However, the flip side is that listeners *expect* ads to fit in with the programming, and when they don't, that dissonance can only hurt listener satisfaction.

2) Therefore, the process of selling—of seeking new advertisers—needs to consider environmental compatibility. Putting a dissonant advertiser on the air hurts both the advertiser and the programmer by clashing with listener expectations.

3) Similarly, broadcasters who create ads for their clients need to be equally careful about context. Radio has a unique relationship with the listener, and listener expectations should shape the ads for each programming atmosphere. Furthermore, being *effective* for each advertiser requires more than just running an ad; it requires harmonizing the campaign objectives with the consumer's listening experience.

4) Radio ads can, and should try to, reach people at a personal and emotional level. When creating ads for clients, broadcasters should heed the advice given to advertisers—ads need to reach people individually, not just as part of "the public." Generic ads are anathema to radio effectiveness.



CONCLUSION

The Radio Ad Effectiveness Lab funded this project in hopes of learning more about how to make radio advertising more effective. We think this study can meet that objective.

Radio is the most personal medium of the three we studied. Consumers choose radio to satisfy very personal wants and needs, and as a result, radio affects listeners at a very individual and emotional level.

The good news is that radio *advertising* also benefits from that personalized connection. Radio ads, like the programming that contains them, are seen as “speaking to me,” and radio advertisers are associated with “trying harder to reach me personally.” That translates into an open door to a listener’s emotions, which we know to be key to advertising effectiveness.

But this observation should also be viewed as an *expectation* on the part of consumers. Listeners trust their stations and networks to bring them personally relevant content, including the advertising. If the ads clash with that environment, the potential for disappointment, even anger, is high.

So here’s at least one piece of the “how” question—of the challenge of how to do *better* radio advertising. **Radio ads need to speak to individuals, not to the general population. And they need to be compatible with their surroundings; effective radio ads must be just as targeted as the programs which contain them.**

ACKNOWLEDGEMENTS

The Radio Ad Effectiveness Lab is grateful to WirthlinWorldwide for their professionalism, creativity, and analytical expertise. The project was proposed by Wirthlin to begin with, and they were extremely helpful and responsive as the project evolved. In particular, we thank Patricia Kidd, Justin Greeves, Jon DeWitt, and Deanne Welle for their excellent work.

We are also appreciative of the many hours of consultation provided by the RAEL Research Committee. The membership list is available at <http://radioadlab.org/committee.htm>. These volunteers from advertisers, agencies, and broadcast organizations were invaluable to the design and interpretation of this study.

RAEL would like to acknowledge the contributions of RAEL research consultant Jim Peacock of Peacock Research, Inc. His direction, insight and guidance have been a critical asset to this project. Among other things, Mr. Peacock is the author of this report.

Finally, we appreciate the full support provided to this project by the RAEL Board of Directors and RAEL’s funding partners, who finance and approve all RAEL research projects. Our current board membership is listed at <http://radioadlab.org/board.htm>.

APPENDIX A: ADDITIONAL DATA

THE FULL TELEVISION ARCHITECTURAL MODEL



Green = Reach
 Blue = Relevance
 Red = Relationship

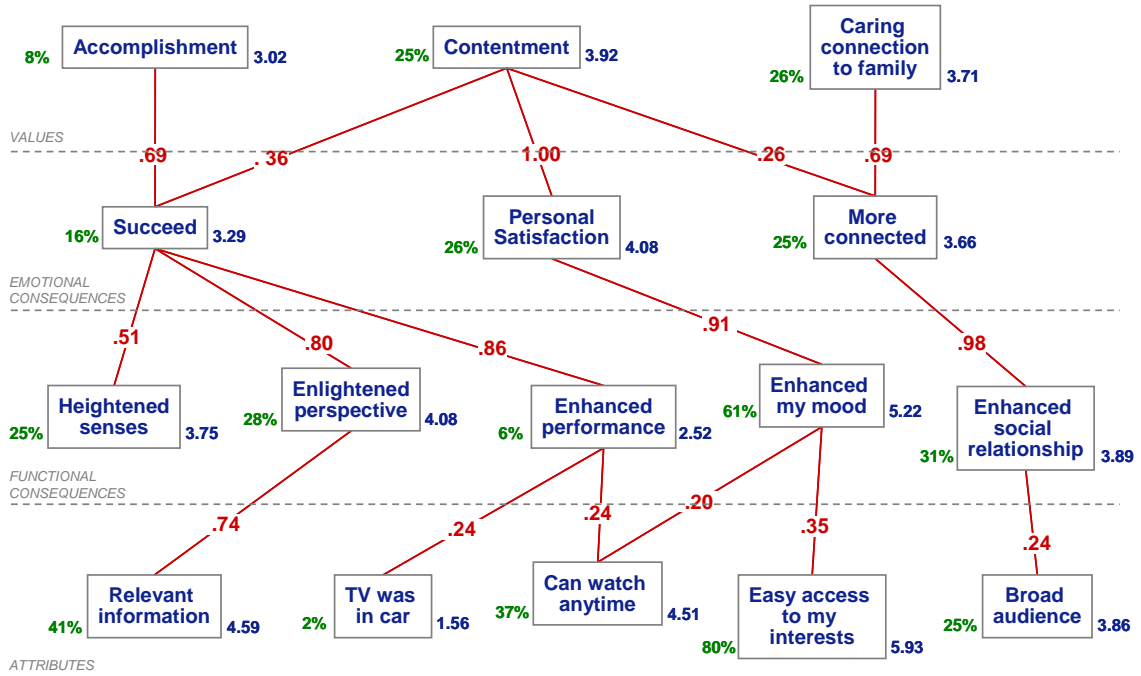


Figure 11: Full TV Model

THE FULL NEWSPAPER ARCHITECTURAL MODEL



Green = Reach
 Blue = Relevance
 Red = Relationship

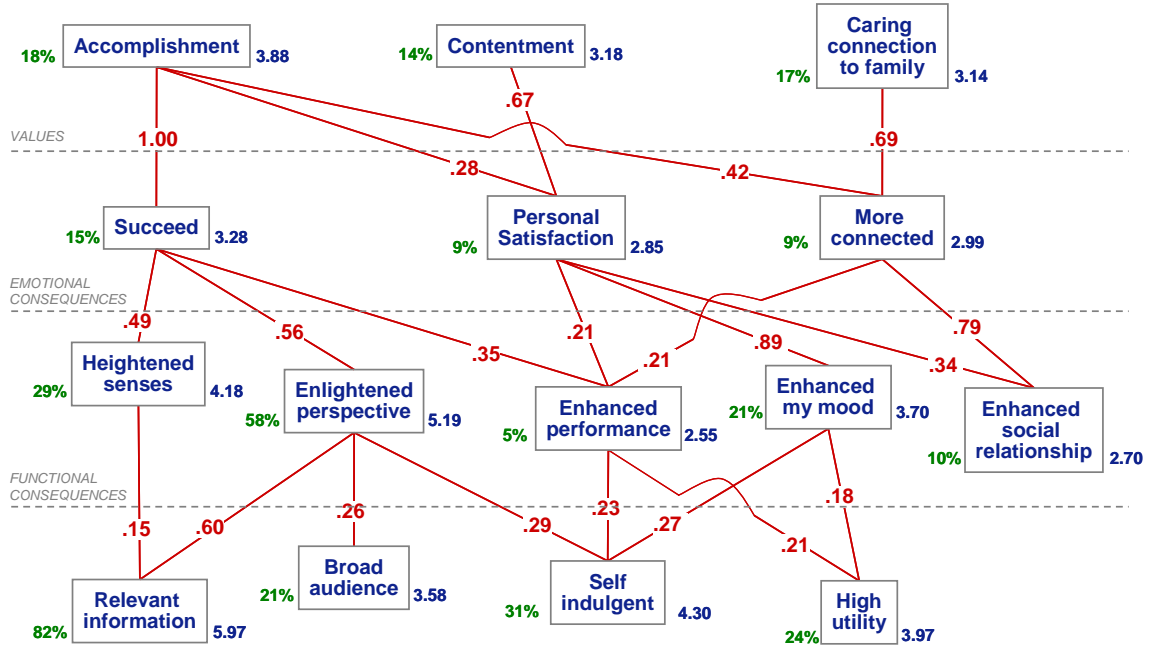


Figure 12: Full Newspaper Model

APPENDIX B: DETAILED METHODOLOGY

DETAILED METHODOLOGY—PHASE ONE

Phase One of the study was designed as qualitative research to identify the lexicon used by consumers in discussing the attributes and benefits of advertising.

Recruiting Respondents

Wirthlin provided a screener with our quotas and criteria³ (age, radio listenership and TV usage, newspaper readership) to focus group facilities in three geographically dispersed markets (New York, Dallas, and San Francisco). The facilities each recruited 18-54 year old respondents to participate in an in-depth personal interview. Respondents were drawn from the facilities' own databases. Wirthlin screened out participants who had taken part in a focus group in the past year in order to avoid "professional" respondents.

When a respondent agreed to participate, they came to the facility at the date and time of their appointment and were greeted by a Wirthlin Values interviewer. These interviewers are specially trained in Wirthlin's Values approach and all have a body of experience probing the emotional aspects of consumer decision-making. All interviews were conducted by Wirthlin's own corps of Values interviewers. A total of 44 adults were interviewed in depth at this stage.

The Interview

The respondent was taken into a one-on-one interviewing room, which had the feel of a comfortable small room. It was lit intimately, with a floor lamp instead of bright overhead lights, and it contained a glider chair and footstool, as well as a small table. There was a chair for the interviewer and, during the first part of the interview, when the respondent was recalling archetypal experiences with media, the interviewer sat behind the respondent so as not to be a distraction.

The interview began by explaining the glider chair and inviting them to sit in the chair. The interviewer then sat behind them, explaining that for this first part of the interview, they were going to ask the respondent to relax and recall some memories.

The interviewer then asked the respondent to count backwards from "10" and as they mentioned each number, the interviewer asked them to relax a part of their body.

Exercise #1: Earliest Memories – Radio, TV, Newspaper

The interviewer then told the respondent that, still keeping their eyes closed, they would like them to remember the earliest memory they have of listening to the radio. As the respondent began to talk about their experience, the interviewer directed them towards a full description of that experience. How old were they? Where were they at the time? Who else was there? What were they doing? How did they feel when they heard the radio?

When the experience was fully described, the interviewer then asked them to identify the one element that was most important to them about that experience. The interviewer then began the values laddering exercise, designed to uncover the emotional reason(s) why that element was most important to the respondent.

³ Radio listenership and TV usage of at least four hours per week, and newspaper readership at least once a week.

The interviewer would then repeat the archetypal memory/most important element/values laddering exercise for TV and newspaper.

The results of the in-depth interviews were coded into the most frequent mentions at each level (archetypal experiences/attributes/functional benefits/emotional benefits/personal values). This is called the “lexicon.”

The purpose of this lexicon was to provide input to the quantitative portion of the study, in which the most frequent pathways will be identified and profiled.

We then gathered comparisons of the relative strengths and weaknesses of radio, TV, and newspaper experiences.

At this point in the interview, the interviewer brought his chair around to face the respondent, thanked him/her for willingness to share personal experiences, and said that the interview would now be about perceptions of each of the three types of media.

Exercise #2: Media Personality

The interviewer asked the respondent to think about radio—in general—and to describe what kind of a person radio would be. For instance, a respondent might say that radio is a suave and sophisticated man who lives in an expensive community and plays golf on the weekend.

We probed for a full picture of the radio personality: Where does the person live? What kind of house do they live in? What kinds of friends do they have? What do they like to do for entertainment?

This was repeated for newspaper and TV and the order was rotated.

Exercise #3: Strengths and Weaknesses of Each Medium

Again, rotating the order of the media, the respondent was asked to think about what they considered to be the strengths and weaknesses of each medium. Responses were probed in depth to determine the underlying perceptions.

Exercise #4: Advertising in Each Medium

We asked people, when they were recruited, to think about a favorite advertisement in each of the three media. At this point in the interview, we asked them to share their example for each medium. With each example, we probed:

- Describe the advertising in detail: What was the product? What was the main idea they were talking about (besides getting you to buy the product)?
- What, specifically, makes this an appealing advertisement to you?
- If you think about what you’ve mentioned as the strengths of (medium), what was it about (medium) that made it possible for the advertiser to get that idea across to you?

The interview then wrapped up by asking the respondent if there were any other thoughts or observations they had about any of the topics discussed.

DETAILED METHODOLOGY—PHASE TWO

Working with the archetypes and values lexicon from the preliminary qualitative research, the next phase of research involved a much larger sample of consumers who were recruited by telephone to participate in a more structured study either online or by mail.

Method

Those who agreed to participate were either sent a link to the survey online (if that was their choice), with a unique password they would use to gain access, or they received a hard copy of the survey in the mail.

Those who completed the survey online took it on a WirthlinWorldwide password-protected site and their results were recorded immediately once the survey was complete. Those who took it via mail filled in the survey when they received it and returned it in a self-addressed, stamped envelope included with their package.

Survey Content

The survey quantified the findings of the qualitative interviews and contained these sections:

Archetypal Experiences:

Respondents were prompted to think about their most recent memory of hearing the radio. This was to set the context for the first exercise, which provided them with words and phrases (developed from the qualitative exercise) and asked them to rate each on the extent to which it was descriptive of their own experience. Then, they were asked to recall their best experience listening to radio and were similarly asked to rate the words and phrases drawn from the eliciting research for how they apply to that situation.

Values Ladders:

Rooted in their best experience with radio, they were then asked to think about that experience and the characteristics that made it special to them. We provided them with descriptors (derived from our first phase of research) and ask them to rate each on the basis of how well it described that special experience about which they were thinking.

Once they rated the attributes, they would be asked to think about the attributes they believed were most important and to think about the result of experiencing those attributes. Again, they would rate a list of benefits for how well each described their own best radio listening experience. A hypothetical list of benefits might look like this:

Functional Benefits	Convenient, find the music I like, can use for entertainment any time/anywhere, gives me something to talk about with friends, can always find something I can listen to that I like, I can always know what's going on, etc.
----------------------------	--

Then, thinking about the benefits they received from that best radio experience, we asked them to rate how they felt as a result of those benefits, again rating each of a series of words or phrases for how well it described their own experience.

Emotional Benefits	Feel connected to friends, makes me feel more interesting, in control, knowledgeable, up-to-date, relaxed, satisfied, etc.
---------------------------	---

And finally, referring back again to the emotional benefits, we provided them with a list of personal values – the end result of that experience – and asked them to rate each for how well it described their experience. The values list might look like this:

Personal Values	Belonging, personal accomplishment, self-esteem, fulfillment, confidence, security, peace of mind
------------------------	--

This process was repeated for TV or newspapers; half the respondents received TV questions, half received newspaper questions, while all respondents were asked the radio questions.

Here's a sample of these comparative questions:

The advertising is more believable.
 Advertisements in this medium do a better job of reaching the people they are meant for.
 I can do other things while absorbing the advertising.
 I am more involved with an advertisement in this

It can be a constant reminder.
 I have control over which advertisements I pay attention to.
 These advertisements are more likely to open my mind to new ideas.
 I am more likely to consider something I hadn't

	Force Choice: Do you associate this statement more with advertising in radio or on TV(50% sample) in radio or in newspapers (50% sample)?						
	In Radio		Both		On TV/ In Newspaper		
	1	2	3	4	5	6	7
I may be mis...							
Advertisers...							
harder...							
I get more e...							
The advertis...							
attent...							
I can make s...							
adver...							
I won't waste my money on things I don't want.							
I am more likely to get a good deal.							
I am more likely to find what is being advertised.							
A greater amount of information can be presented.							
The advertisements more conveniently show me where to find a product or service.							
I can take the advertising and share it with other people.							
The advertisements do not take up as much of my time.							
I can easily take the advertisements with me.							
Advertisements have more lasting effects.							
The advertisements are more able to deliver on promises.							
The ads are more creative.							
The ads from this media source have stronger traditions.							
The ads are more forward looking.							
The ads are more efficient.							
Ads from this media source are more popular.							
These ads are more reliable.							
These ads are honest.							

Sampling & Interviewing Details

The plan was to interview 600 adults age 18-54 for the quantitative portion of the study (Phase Two). The final achieved in-tab was 662 adults, as shown in the Sample Disposition table below.

The sample frame was based on the Random A method of Random Digit Dialing where we included blocks in sampling that had a minimum of 3 numbers in a block (of 100 numbers) to be included as part of the sample. The sampling was national in scope across the 48 contiguous United States.

Our dialing plan included a total of 14 days of dialing, though we went beyond that in later stages of the survey. The dialing included all dayparts: 25% weekday (9am-4pm), and 75% traditional consumer dialing—weeknight (5pm-9pm) and weekend dialing (10am-6pm Sat.; 12pm-8pm Sun.). We used a maximum of eight attempts per record until the record was resolved. We started with at least one initial-refusal conversion attempt on all “non-hostile” refusals, but then expanded conversions as described in a later section. We ran this study on a predictive dialer and used Wirthlin’s proprietary SMS (sample management system) in order to achieve optimum sample efficiency.

Rather than set non-probability quotas, we simply screened for our target age group (18-54), along with the following screeners for media usage:

S5. How many hours per week do you typically spend listening to the radio?

- 1 Less than 2 hours [TERMINATE – DOES NOT QUALIFY FOR STUDY]
- 2 2 to less than 4 hours
- 3 4 to less than 6 hours
- 4 6 to less than 10 hours

- 5 10 or more hours
- 6 I do not listen to the radio [TERMINATE – DOES NOT QUALIFY FOR STUDY]

S6. On average, how often do you read a newspaper?

- 1 Daily [QUALIFIES FOR NEWSPAPER QUESTIONS]
- 2 Several times per week [QUALIFIES FOR NEWSPAPER QUESTIONS]
- 3 Once per week [QUALIFIES FOR NEWSPAPER QUESTIONS]
- 4 Once every two weeks [DOES NOT QUALIFY FOR NEWSPAPER QUESTIONS]
- 5 Once per month or less often [DOES NOT QUALIFY FOR NEWSPAPER QUESTIONS]

S7. How many hours per week do you typically spend watching television?

- 1 Less than 2 hours [DOES NOT QUALIFY FOR TV QUESTIONS]
- 2 2 to less than 4 hours [DOES NOT QUALIFY FOR TV QUESTIONS]
- 3 4 to less than 6 hours [QUALIFIES FOR TV QUESTIONS]
- 4 6 to less than 10 hours [QUALIFIES FOR TV QUESTIONS]
- 5 10 or more hours [QUALIFIES FOR TV QUESTIONS]
- 6 I do not watch television [DOES NOT QUALIFY FOR TV QUESTIONS]

Respondents were initially offered an incentive with a value of \$15 via Incentive Logic, a firm that offers a variety of gifts at a set price. As described in the section on optimizing response rates, we quickly increased the nature and value of incentives.

Sample Disposition for Phase II

	Total Count
Sample Universe	59,146
Total Contacts	39,756
Total Dialings	410,620
Total Dialed in Sample Universe	59,105
Details of Contact	
No answer	8,937
Busy signal	104
Answering machine	3,987
Definite appointment	16
Indefinite appointment	196
Fax/Cell Phone/Pager	3,753
Business number	5,833
Bad phone number	9,595

Deceased	2
Soft Refusal	11,721
Hard refusal	1,708
Privacy Manager (do not accept solicitors)	2,498
Respondent never available	216
Interviewer reject (interviewer determines that respondent is not fit to continue)	457
Office policy (reached a business number and will not participate)	33
Language barrier	1,255
Total Reaching Screening Questions	8,794
Terminated at S1 - someone in family works in advertising, marketing, market research, public relations, radio, TV or newspapers (ineligible 1)	815
Terminated at S2 - not between the ages of 18-54 (ineligible 2)	3,147
Terminated at S4A - do not have a favorite radio station or a radio station that they listen to frequently (ineligible 3)	1,083
Terminated at S5 - do not listen to the radio for at least 2 hrs per week (ineligible 4)	653
Terminated at S6/S7 - do not watch TV at least 2 hrs per week and do not read newspaper daily (ineligible 5)	74
Qualified Terminate - Terminated at S31B - have Internet access to take study online but refuse to participate (ineligible 6 & 10)	370
Qualified Terminate - Terminated at S32B - refuse to participate (ineligible 7)	234
Qualified Terminate - Terminated at S32C - do not have Internet access and refuse to provide their mailing address (ineligible 8)	4
Qualified Terminate - Terminated at S31C - has Internet access and refuses to give e-mail address and end up not wanting to record the URL (ineligible 9)	208
Qualified Terminate - qualified but still ended up refusing at the end of the screener	255
Total Qualified Terminates	1,071
Over-quota	13
Agree to Participate in Study - Complete Telephone Recruit	1,938
Method of Participation	
Receive invitation e-mail	1,412

Take survey website and password. over phone, but do not want to provide e-mail address for invitation	149
Total Agreeing to Online Survey	1,561
Total Starting Online Survey	686
Total Completing Online Survey	540
Total Agreeing to Mail Survey	377
Total Returned Completed Mail Surveys	122
Total Completes	662

Steps Taken to Optimize Response Rates

Over the course of Phase Two of this study, RAEL and WirthlinWorldwide took several additional steps to increase response rates for the surveys. After the first week or so of recruiting, we added a number of enhancements such that the majority of the sample received the following treatments:

We made follow-up conversion and reminder attempts to all of the following categories:

- Those who had agreed to take the survey but had not (either online or mail)
- Those who started the survey online but had not completed it
- Soft refusals
- Those who made a definite appointment they did not keep
- Those who made an indefinite appointment
- Those whose answering machine we reached (leaving an 800 number for them to contact us)
- No answers who had not received the maximum (8) number of callbacks

We also enhanced the incentives shortly after starting calling. In addition to increasing the value of the gift offered upon completing the survey (from \$15 to \$20), which was offered to all respondents from the beginning, we expanded treatments as follows:

Category of contact	\$5 "pre-incentive"	\$20 value gift	Drawing/ two \$1,000
Had agreed to take survey but didn't	X	X	X
Started survey but didn't complete	X	X	X
Soft refusals	X	X	X
Answering machine		X	X
No Answers		X	X

The "pre-incentive" (\$5 cash provided on their agreement to take/complete the survey) was offered on the telephone to those who had earlier agreed but had either not started or not completed the survey, and to soft refusals.

At the suggestion of WW's operations manager, we moved the offer of incentives earlier in the screening interview. Interviewers felt it would help convert soft refusals if they could mention incentives earlier.

We also simplified the first question of the survey (from partially open-ended to all closed-end). This introduction was only designed to get respondents to focus on a particular media event for the subsequent questions, so the tabulated data were not directly affected.

Finally, WW phone center management identified those interviewers who were most successful at gaining cooperation and put them on the conversion of soft refusals.

Analysis

The results of the Phase Two surveys were then analyzed statistically to determine:

- Reach: The frequency with which elements at each level are selected at a meaningful level.
- Relevance: The mean rating for each element.
- Relationship: The strength of the connection between each element and the elements in the next level of the values hierarchy.

This analysis produced a map of the thought pathways connecting the attributes to the most motivating personal values. The dominant pathways were developed for radio, TV, and newspapers.

The following section describes WirthlinWorldwide's general approach to this type of analysis.

BRAND ARCHITECTURE – QUANTIFYING VALUES MAPS AND BRAND ASSOCIATIONS

Brand architecture brings large sample, quantitative rigor to qualitative, one-on-one values research. It has three primary goals.

- Identify the strongest links between the map elements that people say are most important to them. Draw an overall map using strongest linkages.
- Organize map elements and linkages into orientations. An orientation is a set of elements and linkages ranging from attribute to value connected through a unique personal-relevance bridge.
- Determine the strength of association between orientations and the client brand, the competitor brands, consumption situations, and market segments.

SECTION ONE: FIND THE STRONGEST LINKS BETWEEN THE MOST IMPORTANT THINGS

Brand architecture asks a series of rating questions about the importance and brand performance of map elements. These data are always highly inter-correlated, that is every element is correlated with every other element. Consequently, the challenge is to determine the strongest links (highest correlation) between the most important elements. This is done in a three-step process.

- Use factor analysis to organize product attributes into attribute bundles. Do the same thing for product benefits, personal benefits, and values.
- Create nodes in the architecture by using the aggregate scores for each bundled group of attributes identified in the factor analysis and link the bundles together from level to level using a relational technique (i.e., path analysis, regression analysis, correlation matrices).
- Pick out the strongest linkages at the product bridge, personal relevance bridge, and values bridge so that all of the product attribute bundles, product benefit bundles, personal benefit bundles, and values bundles are linked together.

SECTION TWO: ORGANIZE MAP ELEMENTS AND LINKAGES INTO ORIENTATIONS

Now that we have linked all of the map elements together using the strongest possible bridges, we can determine the set of orientations. Each orientation is built around a unique personal relevance bridge. We use the personal relevance bridge to determine an orientation because it is the enduring strategic hinge that connects product to person.

- Build an orientation for each personal relevance bridge (unique link between product benefit and personal benefit).
- Flesh-out each orientation by expanding product attribute bundles, product benefit bundles, personal benefit bundles, and values bundles so that concrete attributes lead to abstract attributes, lower order product benefits lead to higher order product benefits, lower order personal benefits lead to higher order personal benefits, and instrumental values lead to terminal values.
- Interconnect the orientations to produce the finished values map.

SECTION THREE: DETERMINE THE STRENGTH OF ASSOCIATION BETWEEN ORIENTATIONS AND THE CLIENT BRAND, THE COMPETITOR BRANDS, CONSUMPTION SITUATIONS, AND MARKET SEGMENTS.

Performance ratings for the client brand and competitor brands, segments based on consumption situations, and other segments based on other research batteries such as psychographics can be overlaid on the values map.

Performance ratings for the client brand and competitor brands can be shown side by side for each map element of the orientation or can be shown as a “competitive gap,” i.e., the client rating minus the best competitor rating. These ratings can also be shown in an equity analysis grid in which client ratings are plotted on the vertical axis and best competitor ratings are shown on the horizontal axis.

The degree of association between a market segment (based on consumption situation or some other basis) and an orientation using an index score. Each respondent gets an index score for each orientation. It is based on the strength of the personal relevance bridge defining the orientation. Multiplying the respondent’s importance rating for the product benefit by the respondent’s importance rating for the personal benefit forms the index score.

To simplify the interpretation of index scores, they are normalized so that the average score equals 100. Dividing each index score by the grand mean and then multiplying by 100 does this. Consequently, an index score of 110 means the strength of association between an orientation and a segment is 10 percent above average, whereas an index score of 85 means the strength of association between an orientation and a segment is 15 percent below average.

Each orientation also can be “sized” by determining which of the personal relevance bridges is strongest for each respondent. The respondent is assigned to the orientation for which their personal relevance bridge is the strongest. This process is facilitated by the questionnaire asking the respondent to indicate which product attribute, which product benefit, which personal benefit, and which value is most important to them.

Data Processing

Our primary concern in processing the data was whether to weight the completed questionnaires. Certainly there is some differential cooperation across different population groups, and ideally we would have compensated for differential returns through statistical weighting.

However, because our survey involved screening on media usage, we could not simply compare our sample to standard population estimates by age, gender, geography, etc. While we started with a probability sample of the general population, our actual designated sample is defined by media factors as well as demographics, and that rules out simple Census-based population estimates as a weighting target.

We did consider weighting our sample of completed questionnaires to the distribution of our agreeing sample. The representativeness of the sample we recruited on the telephone might be a decent surrogate for the population we attempted to survey. At a minimum, using that distribution as a target might have corrected for differential cooperation rates from that point forward.

However, we found (somewhat to our surprise) that the distribution of the completed questionnaires was very, very close to the distribution of the agreeing sample, at least for those variables that were collected at both stages:

RAEL - Recruits/Consenters:

18-24: 15%
25-34: 25%
35-44: 29%
45-54: 31%

RAEL - Respondents:

18-24: 14%
25-34: 24%
35-44: 26%
45-54: 35%

RAEL - Recruits/Consenters:

Male: 38%
Female: 62%

RAEL - Respondents:

Male: 37%
Female: 63%

Because these distributions were so close, we decided that weighting of the tabulated sample might do more harm than good. And in fact, we were pleased to see so little variation in apparent cooperation (after recruitment) by demographic.