

Guide to Competitive Media

Newspaper

Television

Internet

Direct Mail

Yellow Pages

Cable

Point of Purchase

Magazine

Weeklies

Media Facts

RADIO ADVERTISING BUREAU
Radio

Radio

Media Facts

A Comprehensive Media Guide



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Using this Guide

More than ever before your business is faced with tough challenges. Your costs are increasing. Competition within the marketplace is tightening. Profits are becoming more limited, and your vendors are providing less and less marketing support. Customers have grown more cautious of how and where they spend their money.

Then, of course, there are all the advertising issues. Do people really read the newspaper anymore? Which of your customers watch television? Is cable a wise investment? How will online users find your Internet banner ad — and will they click on it? Are the Yellow Pages an effective use of your budget? Will anyone see your outdoor ad and act on it? Will people respond to your direct mail campaign?

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

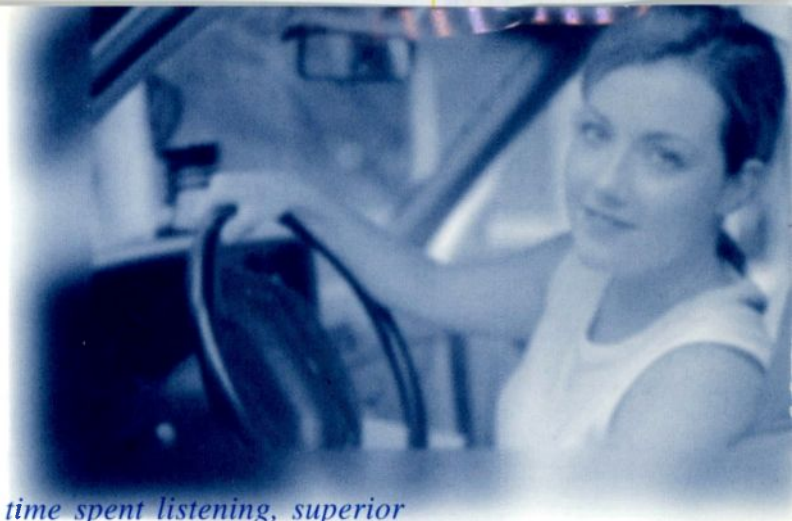
Of course, we sincerely believe that Radio should play a primary role in any comprehensive marketing effort. Radio offers a host of unique elements that can support and enhance your current advertising program either by itself or by incorporating it into a broader, integrated media strategy.

We know that every advertising or marketing dollar you spend needs to produce results. It needs to pull customers through the door, and it needs to ring up a sale at the cash register. Undoubtedly you have many questions to ask and many factors to weigh before spending a cent. Please don't hesitate to ask your RAB member Radio station for additional information, or call us directly at 1-800-232-3131.

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Radio



Radio's advantages include high amount of time spent listening, superior targetability, superior listener loyalty, ad recall and message retention, and more. Advertisers who recognize the power of Radio have voted with their budgets. No other medium can claim over 7 years of uninterrupted revenue growth.

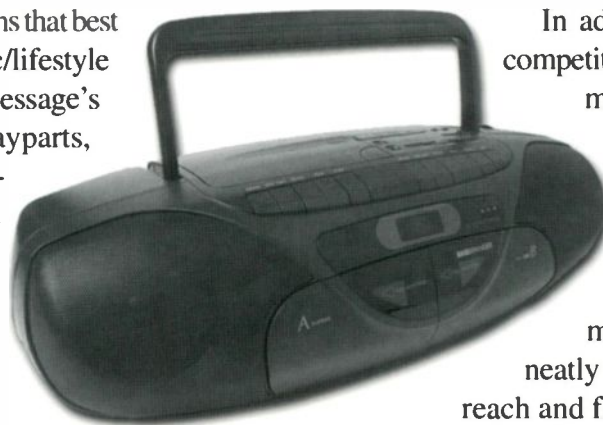
Radio has many natural advantages that make it an excellent choice for an advertising medium. These advantages include high amount of time spent listening, superior targetability, strong listener loyalty, ad recall and message retention, and more. Advertisers who recognize Radio's power have voted with their budgets to the tune of \$15.4 billion in 1998. This trend continues with an unbroken string of revenue increases. No other medium can claim over 7 years of uninterrupted revenue growth.

Numbers like that are a direct outgrowth of Radio's ability to deliver not only a substantial number of listeners daily, but to make those listeners a loyal and committed group who identify with their favorite stations and tend to stick with just one or two. This tendency of Radio listeners to strongly identify with just one or two stations is at the heart of Radio's excellent targetability. By selecting the station or stations that best fit your target demographic/lifestyle and further refining your message's reach through selected dayparts, you can focus your advertising in on those you most wish to hear it.

With the landmark 1996 Telecommunications Act now in force for several years, consolidation

continues to change the face of the Radio industry, allowing station clusters new strength to compete with other media in areas such as market reach, and new ways to meet the needs of advertisers.

Another trend that has been swelling ad revenue coffers at stations across the nation is the rise of "dot-com" companies as a skyrocketing advertiser category. These cyber-firms, looking to boost site traffic, have been pouring money into offline advertising – particularly into Radio. Some pundits point to dot-coms' less-than-hoped-for fourth-quarter 1999 totals and predict a slowdown in the phenomenal growth of Radio advertising sales to this group, but Radio is still very much recognized as an excellent marketing vehicle for dot-coms as well as traditional brick-and-mortar advertisers establishing an online presence.



In addition to being a worthy competitor against a variety of other media all competing for ad dollars, Radio also serves as an excellent partner for advertisers looking to mount a multimedia campaign, combining two or more approaches. Radio fits neatly with other media to extend reach and frequency beyond what either could accomplish alone.

Imagery Transfer

Repeated studies show that “the ear is superior to the eye...people remember more if they hear words than if they see them.” In fact, the mind is able to understand a spoken word in 140 milliseconds, while it takes 180 milliseconds to understand the printed word. Why? Psychologists believe this 40-millisecond delay occurs when the brain attempts to translate visual data into aural sounds it can understand.

Similarly, what you hear is retained longer in your memory than what you see. A visual image fades in about one second, while an image received by the ear lasts four or five times as long. Since sound lasts so much longer in the mind, the spoken word leads to greater clarity of thought than a picture does. Additionally, the tone of the human voice gives words an emotional impact that printed words alone can't impart.

To consumers, most categories of products pretty much look alike. What differentiates them are the intangible ideas imparted by the words we use to describe them. BMW has “driving,” Maytag owns “reliable,” and Crest means “cavity prevention.”

Scientific evidence strongly suggests that the ear drives the eye, and then the ear works the mind. Thinking is a process of manipulating sounds, not images. As a result, you see what you hear — and what the sound has led you to expect to see — not what the eye tells you it has seen.

According to noted positioning authority Jack Trout, this new understanding of how the ear influences the mind calls for a complete reorientation from the visual to a verbal point of view. Visuals still play an important role in communications, but the verbal message should be the primary driver.

Consider This

Consumers spend 85% of their time with ear-oriented media, such as Radio, but spend only 15% of their time with such eye-oriented media as newspapers and magazines.

Yet advertisers spend 55% of their dollars on eye media (print) and only 45% of their dollars on ear media such as Radio and television (although research suggests that sound plays a far more crucial role in the effectiveness of TV than many advertisers realize).

What Does It Mean

Since marketing (and branding) is a matter of successfully creating a positive association for your product or service in the minds of consumers, and since the mind works by manipulating sounds rather than images, then Radio — the premier sound medium — is one of the best ways to directly influence the minds of consumers.

Three out of four consumers who watch a television spot will “replay” the visual image mentally when they hear a Radio commercial using the same audio.

How? It's called Imagery Transfer, and it's the process by which visual elements of a TV commercial or program are transferred into the consumer's mind by using a similar audio track in its Radio counterpart. Through Imag-

ery Transfer, Radio creates a synergy with television that can work for virtually any advertiser or agency. Radio is able to keep images fresh and top-of-mind. It increases product awareness. And, by developing a campaign that combines Radio with the visual aspects of television, you can enhance your overall advertising strategy and market position.

When you use Radio as an integral part of your TV campaign, Imagery Transfer lets you:

- Extend campaign reach
- Substantially increase message frequency
- Improve awareness during TV flights
- Maintain awareness between campaigns
- Maximize your advertising investments
- Reach consumers on the go

By incorporating Imagery Transfer into your campaign, you can reinforce the dollars you spend on television by using Radio to build the reach and frequency necessary to target your best customers effectively...and with far greater results.

Broadcast TV

Many viewers consume a limited amount of TV in the course of the day. Those viewers characterized as “light TV viewers” watch only about 90 minutes of TV between the hours of 6 am and midnight; reaching such viewers with a TV spot can be difficult, and 40% of all TV viewers fall into this category.

For more than fifty years, broadcast television has filled our living rooms with the flickering glow of a media revolution. From *The Honeymooners* to *Ally McBeal*, television has defined two generations of consumers. Of course, television does not possess the unifying power it once did. A viewer in decades past could tune in to Jack Benny or Milton Berle and know he was sharing the moment with nearly every other American; nowadays, with the explosion of other viewing choices such as cable, satellite TV, pay-per-view, rented videotapes, and more, the US viewing audience has become fragmented. This splintering of ad viewers has diluted TV advertising’s potency.

And not only are fewer people watching a given TV channel, but many viewers consume a limited amount of TV in the course of the day. Those viewers characterized as “light TV viewers” watch only about 90 minutes of TV between the hours of 6 am and midnight; reaching such viewers with a TV spot can be difficult, and 40 percent of all TV viewers fall into this category.¹



And now another technological marvel looms on the horizon, threatening to turn everything upside down again. That marvel is digital television (DTV). DTV is on a government-mandated track to replace the current analog system by 2006. After stalling late in 1998, the industry seems back on track, with High-Definition Television (a subset of DTV) signals being broadcast in dozens of major markets.

DTV may have any of several repercussions. First of all, it will take \$1 million or more in hardware just for a TV station to pass along national digital feeds. Stations will want to recoup these costs, and will likely pass them along to advertisers. Also, DTV technology may be used to provide several standard-definition channels in the same space as one analog channel. If broadcasters opt for this route, advertisers may be faced with audience fragmentation similar to that of cable TV. Finally, new digital recorders such as TiVO allow real-time editing of commercial content, creating another headache for network and local stations alike.

Advantages

Widespread: Over-the-air television reaches virtually all Americans. Ninety-eight percent of U.S. households have at least one TV.²

Time Spent: People spend a lot of time with their television sets. On average, U.S. viewers watch television about four hours a day.³

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: Television reaches huge 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 43.3 percent (ABC, CBS, FOX, NBC) in July 1999. 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 twenty-year downward spiral.⁴

VCR Use Decreases Viewership: As VCR use increases, the impact of TV commercials decreases. Most homes (85 percent) have at least one VCR. The average VCR home uses the machine six hours weekly.⁵

Channel Surfing: When a commercial comes on, many viewers go surfing. They zip through other channels to avoid the non-program content (i.e., ads, promos and PSAs), which has grown to more than 25% of each prime-time hour.⁶

Viewing Decreases as Income Increases: U.S. adults who earn more than \$60,000 watch 26% less television than the average viewer.⁷ Compare with Radio's affluent listeners, which are actually *more* likely to listen to Radio as income level increases.

Skyrocketing Production Costs: A typical thirty-second national commercial can cost hundreds of thousands of dollars to produce. The creative requirements of television production result in a great drain of funds to pay for advertising agency commissions, production companies' services, and creative directors' salaries.

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).⁸ By adding Radio to your media mix, you can virtually double your impact on this important, upscale audience.

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% 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 television was hailed as ushering in a new era of programming choices and broadcast alternatives. Yet, until just recently cable's reality lagged behind the promise of the concept, plagued by complaints of lousy customer service, hard-to-justify rate increases, and a failure to live up to technological expectations.

When cable television burst onto the scene more than two decades ago, it was hailed as ushering in a new era of programming choices and broadcast alternatives. Yet, until just recently cable's reality lagged behind the promise of the concept, plagued by complaints of unsatisfactory customer service, hard-to-justify rate increases, and a failure to live up to technological expectations. It is only in the past few years, with formidable challenges from alternative PAY-TV sources, not to mention technological revolutions imposed from outside, that cable has made a concerted effort to get its act together.

Part of the effort is a broad-based upgrade of cable companies' physical plants. These upgrades are particularly impacting cable TV advertising. Advances such as digital ad insertion technology, the growth of interconnected markets, and better billing and traffic software have made cable more appealing to advertisers.

The Cabletelevision Advertising Bureau states that revenue derived from cable advertising grew from \$5.7 billion in 1995 to an estimated \$11.5 billion in 1999.¹ As

good as these increases are, the Television Bureau of Advertising (TVB) projects continued growth with a 14 to 16 percent increase in overall cable ad revenues in 2000.²

In spite of its past problems, the cable industry has steadily added subscribers over the years. As of May 1999, households with basic cable numbered 67,607,910, or 68 percent of all American TV households.³ However, the industry faces new challenges. Direct-broadcast satellite (DBS) has captured more than 11 million subscribers in just a few short years, and is poised to acquire viewers in unprecedented numbers now that the government has granted permission for satellite companies to offer local channels. Moreover, digital broadcast TV may force burdensome channel loads and further audience fragmentation on cable operators.⁴ Indeed, many operators are seeking future revenues from non-traditional sources such as telephone service and high-speed Internet access, areas that will not support increased cable TV ad buys. Cable advertising must rely on more than inertia and a few new toys if they expect to compete in the future.



Advantages

Growth Spurt: Cable now reaches 68 percent of all U.S. homes, and even more (80 percent vs. 49 percent in 1985) among households with an annual income over \$50,000.⁵

Inexpensive: Considered by many advertisers to be "discount television," cable offers some of the same benefits (e.g., motion, visuals, sound) as over-the-air television, at considerably cheaper rates.

Targetable: Cable offers a considerably more targetable audience than over-the-air TV. Almost all cable homes (99 percent) receive 30 or more channels, and 60 percent of viewers have 54 or more choices...allowing 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 1998, Americans spent an estimated \$33.7 billion subscribing to cable services.⁷

Summer Season: Cable's ratings typically increase during the summer, when over-the-air television ratings decline due to reruns.

Disadvantages

Small Audiences: Because it offers so many viewing options and not all cable channels are carried by local providers, cable audiences are considerably smaller than those of broadcast TV. During prime time, even the top cable networks rarely exceed three percent penetration among TV households.⁸ As more channels are added, the pie will be further fragmented. (See *Broadcasting & Cable* for exact numbers).

Limited Commercial Impact: Cable still has not been invited into a third of all U.S. homes. Cable (basic and premium) accounts for just 38 percent of total TV viewing among U.S. adults.

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

Quality: Local advertisers, whose ads are often placed adjacent to national sponsors' offerings, are forced to spend an ever-increasing portion of their budgets in an attempt to achieve comparable video quality.

Plus *Radio*

By combining Radio with your cable television plan, you can reach consumers who don't watch much cable programming as well as those who do spend a share of their media time with the medium.

Cable's targetability, while better than broadcast TV, is still limited. Radio is the premier targeting medium. 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. Your Radio commercials can even serve as the audio track for your cable spots, ensuring a most synergistic and creative marketing plan.

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

Direct Mail

Advertisers love direct mail because of its vaunted abilities to target and focus on highly specialized segments of the population. Using sophisticated computer database management techniques, direct marketers can target consumers by any yardstick the advertiser wishes.

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

Advertisers love direct mail because of its vaunted abilities to target and focus on highly specialized segments of the population. Using sophisticated computer database management techniques, direct marketers can target consumers by any yardstick the advertiser wishes — geographical area, educational level, age, sex, previous purchase history and much more. Direct mail can also be very useful in tracking consumer response, and its format allows for the distribution of product samples along with coupons.

Talk to many consumers, however, and a very different picture of direct mail advertising emerges. 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 junk mail, they tend to open mail only from advertisers with which they are already familiar. In fact,

people are so fed up with the river of junk mail pouring through the mail slot that a whole industry has sprung up devoted to helping people get off direct mail lists.

What's more, time-crunched consumers are not clipping and redeeming coupons the way they once did, reducing the impact and trackability of many direct marketing campaigns. The most recently available data indicates that despite steadily increasing coupon face values over five of the past six years (1996 showed a slight decrease in face values), overall coupon redemption plummeted nine percent in 1994, dropped six and a half percent in 1995, again dropped nearly nine percent in 1996, and continued its slide in 1997 with a decline of seven and a half percent.¹ Direct mail also has competition from the Internet for position as the premier one-to-one marketing medium.

Despite these problems, many advertisers remain committed to the medium. The key is to find media partners that will extend direct mail's reach and help it lure new customers as readily as it strengthens bonds with existing ones.



Advantages

Targetability: With direct mail, an advertiser can target potential customers by geographical area, product affinity, previous purchases, and potential interest based on database mailing information.

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

Maintenance: 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 two or three percent to be successful. This means that up to 98% of the people you market to will reject your offer. Much of the time, direct mail is thrown away unopened; when consumers actually do read their direct mail, they tend to read that which they receive from advertisers with whom they are already familiar or comfortable. Direct mail is much more effective in reinforcing *current* customers than attracting new prospects.

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. In fact, there are many services devoted to helping consumers get their names removed from mailing lists.

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 not likely 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 reality is that for all its growth, advertising on the Internet is still a new medium that is a long way from reaching everyone. Obviously, the reach of Internet advertising is limited to those who have both computers and Internet connections, which limits its effectiveness somewhat.

The Internet, while still playing catch-up with older, established media such as newspapers and television, is one of the most explosively growing advertising options there is. According to an Internet Advertising Bureau (IAB) report prepared by Coopers & Lybrand, from essentially zero as recently as five years ago, online advertising climbed to \$1.92 billion in 1998.¹ That's more than double the total for 1997 — and an incredible 619 percent jump from 1996, when the reported revenue for the entire year was \$267 million.

And the most recent available numbers for 1999 show that Internet advertising is continuing its steep climb. The IAB reports that in the second quarter of 1999, revenues grew to \$934.4 million, which is more than double the same period in 1998; if totals for the rest of 1999 keep up the pace, the fledgling industry may be looking at a \$3 billion-plus calendar year.²

Moreover, it's said that a high tide raises all boats. The phenomenal success of the Internet has precipitated increases in traditional

media channels, particularly Radio, as so-called “dot-com advertisers” flock to stations, dollars in hand, to build brand recognition. In October 1999, Interep Research predicted that national Radio spending by dot-com advertisers would reach between \$165 million and \$212 million for the year, a figure that does not include the additional money spent locally.³

Still, such stunning potential shouldn't cause advertisers to flock to the Internet without a clear strategy and a reason to be there. Advertising on the Internet is still a constantly evolving medium that has yet to reach equilibrium. Obviously, the reach of Internet advertising is limited to those who have both computers and Internet connections, which limits its effectiveness. Online privacy fears also will have to be addressed; while

the likelihood of credit card numbers being stolen during an online transaction is now no higher than during a conventional purchase, consumers will need to be reassured. The medium is most effective with products suited for primarily male audiences age 18-34 (the predominant demographic).



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 the consumer just prior to purchasing...and actually inform them in great detail about how and why to buy.

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

Infrastructure Problems: 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.

Limited Reach: Technology consulting firm Parks Associates estimates that as of 1999, 56 percent of U.S. households have at least one personal computer; just 39 percent have Internet access at home. There are hundreds of thousands of Web sites on the Net, but the average user "visits" only a few — and "re-visits" only a fraction of those.⁴

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 technical innovations continually boost access speed and response time on the Net, a significant base of users is still 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, may move on quickly if they don't think the site is worth the wait.

Plus *Radio*

Actually, Radio and the Internet make perfect marketing partners. Many Radio stations have built their own Web sites that offer advertisers unique marketing opportunities. You can use your Radio schedule to draw attention to your interactive ad on the station's Web site and to your own home page.

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 about 5½ hours per weekend with their favorite stations, it's easy to generate enough message frequency to get them to check out your online advertisement.⁵ 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



People in the US simply do not read as much as they used to, and those who do read often spend less time doing so than in days past. Advertisers are looking at the next generation of shoppers and feeling some perhaps well-justified concerns about magazines' consumer readership base.

Take a look at the current state of magazine advertising sales, and things look pretty good. The industry racked up sales of \$14 billion in the first 11 months of 1999, a 12.1-percent increase over the first 11 months of 1998.¹ There were more than 450 new magazines launched in 1998, adding to a base of more than 18,000 titles on nearly every subject ever put to paper.² Look to the future, however, and things seem a little cloudier.

The magazine industry shares many of the newspaper industry's concerns about the future of reading in this country. The sad fact is that people in the US simply do not read as much as they used to, and those who do read often spend less time doing so than in days past. Reaching that coveted 18-34-year-old demo by advertising in magazines is becoming increasingly elusive. Advertisers are looking at the next generation of time-challenged, seemingly print-hostile

(or at least print-indifferent) shoppers and feeling some perhaps well-justified concerns about its consumer readership base.

And yet, consumer magazines have plenty to offer some advertisers. It is still true that specialty magazines, with their infinite spectrum of niche readers, can offer fairly tight targeting opportunities for the advertiser who's willing to do a little homework. Moreover, magazines' portability means that a magazine ad may be carried far and wide and read anytime (except perhaps behind the wheel).



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 1999 Simmons data, 81.5 percent of adults age 18 and up say they read one or more magazines.³

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 clearly designated as ads.

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

Disadvantages

Competition: There are too many magazines...and too many choices. Advertisers and consumers have over 18,000 magazine titles from which to choose, many of which do not survive their first year of publication.⁴

Time: The average person spends only five or six percent of his or her daily media time reading magazines.⁵

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: Because of diverse readership and consumer readership behavior, most magazines miss most of their target audience. The average issue of *Business Week* reaches less than three percent of all professional managerial adults, and *Good Housekeeping* misses more than 85 percent of adult women.

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 ten years.

Plus *Radio*

Radio reaches 94% 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 (95 percent of adults each week and 75 percent of adults each day) can draw attention to the magazine just for them...and your ad.⁷

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.

Newspapers

Circulation is flat or declining, while paper costs and other resources continue to drive ad rates up. As if these factors weren't enough, Internet and Radio are encroaching on the industry's traditional turf: classified ads.



To some competing advertising media, it must sometimes seem as though newspaper advertising is leading a charmed life. Consider the facts: Newspapers lost nearly 5.5 million readers between 1986 and 1996.¹ Studies show steadily declining readership until just recently (the industry posted a six-month circulation increase of 0.072% in March 1998 — its first sign of growth in a decade — but the slide has now resumed), and those who do read the paper typically spend less time doing so than in times past.² Readers under the age of 35 are spending less time than ever with their local paper. In many markets, circulation is flat or declining, while paper costs and other factors continue to drive ad rates up. As if that weren't enough to drive most newspaper owners to the aspirin bottle, other media such as the Internet and Radio are encroaching on the industry's traditional turf: classified ads. A bleak picture, to say the least.

And yet, despite the mountain of problems, the newspaper industry somehow manages to keep racking up *increases* in ad revenue. Preliminary figures from the News-

paper Association of America projected that total ad sales revenues for 1999 would grow to \$46.6 billion³, an increase of 5.2 percent over 1998.⁴ This growth may be due in part to newspaper sales staffs' changing their traditional "order-taking" approach and prospecting for new business more proactively.

However, challenges remain. The phenomenal growth of the Internet has given the newspaper industry new competition for classified advertising, a \$17 billion-per-year category representing 30 to 50 percent of total ad revenue for many papers.⁵ 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. Indeed, recruiting on Radio is more effective than traditional channels

when the economy is strong and unemployment is low. To continue to compete in a changing environment, newspapers will be forced to establish online presences of their own. Not to do so would mean risking the loss of that famed loyalty newspapers enjoy among their ad clients and readers alike.



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: You 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 Market Penetration: In most markets circulation is less than 50 percent of all households⁶ (please ask to see the RAB Newspaper Performance Report based on Audit Bureau of Circulations data for your local market).

Passive: The paper supplies retail information once the decision to buy has been made, but it does not build brand awareness or create product demand. Newspaper advertising thus works mainly for comparing prices.

Browsers, not Readers: Most people really don't read all sections of the paper every day. An ad placed in a specific section reaches only the people who look at that section.

Readers Don't See Ads: On average, only 42 percent of readers will recall noting a full-page ad⁷ (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.

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. Your ad placed next to your competitors' can only be an advantage if your price is absolutely the lowest.

New Competition from Outside: One of newspaper's strongest ad categories – classifieds – is under attack not only from companies on the Internet, but from savvy Radio stations, too.

Plus *Radio*

Adults 18+ spend three hours and 12 minutes per day listening to Radio...considerably longer than they spend with newspaper.⁸

Using Radio with newspaper increases the reach of your advertisement and ensures greater coverage among light readers and younger consumers.

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. Combining Radio with newspaper allows you to influence your customers closer to the point of purchase.

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.

Outdoor



The need to communicate a message in a split second to a viewer zooming by on the highway not only sharply limits the level of detail an outdoor ad can convey, but also results in relatively poor recall among viewers. Moreover, many consumers feel that billboards are ugly.

In an age of ever-increasing specialization, with media focusing on smaller and smaller slices of the population, outdoor advertising — particularly billboards — remains the champion of the generic and the all-inclusive. Far from a tightly targeted medium, outdoor is positioned as a way to reach large, undifferentiated audiences. And the industry is successful; the Outdoor Advertising Association of America reports estimated 1998 billboard revenues at over \$2.33 billion, the sixth consecutive year of revenue growth.¹

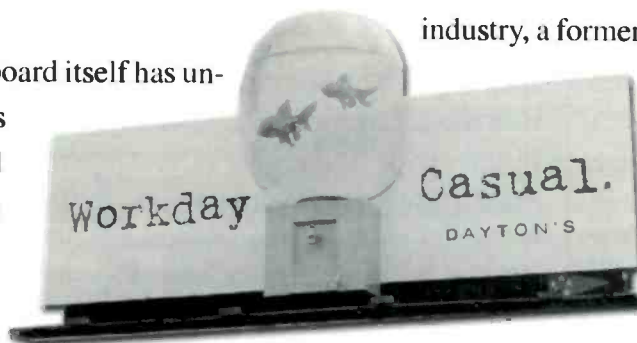
Many think only of billboards when thinking of outdoor advertising. However, the category contains far more than just billboards. Other types of out-of-home advertising include signage on transit and bus shelters, airport and train stations, bus exterior ads, street furniture such as public benches, moving billboards, and more.

And the humble billboard itself has undergone a metamorphosis of sorts in the last several years. Advancements in billboard technology — including vinyl & comput-

erized painting, three-dimensional effects, backlighting, digital & LED technology, computerized lighting and more — boost billboards' ability to capture viewers' attention. Moveable message signs allow three different images or messages to show in succession on a single sign, greatly increasing potential revenue per sign.

Of course, outdoor advertising has its drawbacks. The need to communicate a message in a split second to a viewer zooming by on the highway not only sharply limits the level of detail an outdoor ad can convey, but also results in relatively poor recall among viewers. Moreover, many consumers feel that billboards are ugly and only a few feel the signs are entertaining, according to research.

Another worrisome development for outdoor advertisers is the steady retreat of the tobacco industry, a former outdoor stalwart. However, a huge explosion in so-called "dot-com" advertising from Internet and e-commerce firms has more than offset the losses.



Advantages

Brevity: Outdoor advertising is effective for communicating short messages and simple ideas or concepts.

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.

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

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

Full-time Audience: Outdoor's message appears year-round, 24 hours a day.

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

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. There are a few studies extant, 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 either eliminated, reduced, or limited the volume and placement of outdoor advertising.

Inflexible: Once your message is up, it generally stays up through the duration of the contract. 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 erected, but Radio allows your message to travel with your customers wherever they are...at home, at the office, and in the car. By combining Radio with outdoor, you can build your message frequency — and reach more of your customers more often.

A billboard can grab your customers' attention, and Radio can give them the details. By combining these two 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

There's one critical task 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 of the plan that would reach shoppers before they reach the store.



Place-based or point-of-purchase marketing has a fine tradition, reaching at least as far back as the 1800s. In those days, Smith Brothers was fighting against a slew of copycats hoping to cash in on the success of the company's cough drops. William and Andrew Smith chose to place their distinctive, bearded portraits on their point-of-purchase materials, which consisted of glass bowls for counter display and small envelopes into which the shopkeeper counted the cough drops for each sale.

Smith Brothers also illustrates another principle of 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 his 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 be-



fore a buying decision is reached — is now applied to a host of products in venues such as grocery stores.

And the numbers show that the approach works — or at least *some* of the numbers do. PROMO Magazine offers figures claiming 16 percent growth and \$13.7 billion in 1998 revenue.¹ The Point-of-Purchase Advertising Institute cites data showing that about 70% of purchase decisions are made in the store. However, rival statistics claim that only a fourth of shoppers notice P-O-P promotions on product packaging, and of those who do, only a tenth actually go on to buy the product.²

It's also important to keep in mind that there's one critical task 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 of the plan that would reach shoppers *before* they reach the store... perhaps with a sister campaign on the Radio.

Advantages

Placement: Place-based advertising can be located almost anywhere — in stores, next to merchandise, on shopping bags, at the checkout counter, even suspended from the ceiling.

Targeted: It is most effective when it is located so it reaches a clearly defined consumer target closest to the time of purchase.

Effective: Place-based advertising directly affects incremental 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.

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 appropriate 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: Most 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% 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, 75% of U.S. adults age 18 and up listen to Radio an average of three hours and 24 minutes per day.³

Radio is a proven 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



Alternative newsweeklies welcome ads from industries that may have difficulty finding a place in other media. However, the flipside of such an openhanded ad acceptance policy is a glut of ads for liquor and tobacco companies and adult businesses — a group some advertisers may feel uncomfortable joining.

Daily newspapers are not attracting younger readers as much as in years past. So how are those younger readers spending their print media time? Chances are, it's with an alternative newsweekly. These weekly papers are often the only alternative to the leading daily paper in a given market, and many 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.

The alternative newsweekly industry, like the Radio industry, has been profoundly changed by consolidation in recent years. Many newsweeklies that position themselves as local underdogs may actually be owned by conglomerates headquartered in another part of the country.

One advantage to consolidation for advertisers is that it's now easier to assemble national marketing coverage. The Association for Alternative Newsweeklies (AAN) recently launched a national classified network with over

a hundred participating U.S. newsweeklies and aggregate circulation in excess of 6.5 million readers. In just its first five weeks of operation, the new network racked up a week-over-week revenue increase of over 200 percent.

Alternative-newsweekly readers tend to be very desirable target consumers. According to the Alternative Weekly Network (a non-profit corporation specifically created to facilitate and coordinate national advertising buys for the alternative press), the typical newsweekly reader is:

- Male (53 percent)
- Female (47 percent)
- Single (50 percent)
- Young (42 percent are aged 18-34; 75 percent are aged 18-49)
- Educated (82 percent attended or graduated from college)
- Affluent (Average household income is \$47,124)¹



Advantages

Wide Distribution: Newsweeklies are usually distributed on hundreds of racks throughout a city, ready to be picked up on a whim by your target audience. Most are available free of charge, so potential readers don't even need to part with \$.50 to read the advertiser's message.

Pass-along Readership: People carry newsweeklies with them everywhere, often leaving them behind when they're done — to be picked up and read by someone else.

Hip Image: Newsweeklies are targeted to hip, youngish readers who rarely look at daily newspapers but whom advertisers want to reach. In particular, the local newsweekly is the source of choice for entertainment news among this demographic. Advertisers can take advantage of this reputation to enhance their own images.

"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 many categories that may have difficulty finding a home in other media, such as liquor or tobacco advertising, are welcome here.

Disadvantages

Sleazy Reputation: The flip side of newsweeklies' openhanded ad acceptance policy is that they attract a certain class of ad — including not only the above-mentioned liquor and tobacco ads, but also ads for adult services such as 900 numbers. Many advertisers would be uncomfortable sharing the pages of a publication with such advertisers.

Limited Publication Schedule: The name "newsweekly" says it all. The majority of these publications are produced only once a week — not often enough to achieve frequency in consumers' minds.

Production Quality: Although some newsweeklies boast production values rivaling or even surpassing the local newspaper, some are produced as cheaply as possible, resulting in an overall "cheap" look many advertisers won't want to be associated with.

Narrow Appeal: Newsweeklies' 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 newsweekly's schedule, ads must usually 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 newsweeklies share many characteristics. Both have ties to the local community, both have loyal followings and a cooler image than stodgier media such as the local daily newspaper...and both are locked in a struggle to lure ad revenues away from that daily newspaper. They are at their most potent when they join forces.

Newsweeklies' ad clients can drive readers to their ads with Radio coverage, and Radio advertisers can supplement their Radio ads with greater detail in a corresponding newsweekly ad. Last-minute changes can be accommodated with eleventh-hour Radio spots.

Clubs with live music, record labels, music stores...all of these core newsweekly 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 newsweeklies. With Radio to reach currently employed potential applicants on the job and a newsweekly classified ad to follow up and provide detail, you'll attract a better class of employee.

Yellow Pages



While the Yellow Pages are an excellent reference tool, they fare less well when considered as an advertising medium. For one thing, consumers expect and even welcome advertising clutter when consulting the Yellow Pages.

Yellow Pages advertising is one of the most venerable forms of promoting a company available; the first business directory appeared in New Haven, Connecticut in 1878, and the first Yellow Pages about five years later in Cheyenne, Wyoming. For decades, there was little change in the Yellow Pages industry due to telephone monopoly. However, after the breakup of the Bell System in 1983, a new era of competitive pressure began.

Since then, the Yellow Pages have undergone some changes to make them more competitive and useful to consumers. Indeed, it is no longer accurate to speak of “the” Yellow Pages; many metropolitan areas now have several Yellow Pages sources competing for space on that shelf under the telephone. Advances in printing have not only improved artwork reproduction, but also enabled the use of color in ads to a degree far beyond the traditional red accents.

A particularly important new development in the Yellow Pages industry is the advent of syndicated, objective, third-party research to track and rank Yellow Pages usage. NFO AD:IMPACT, sup-

plies ratings to the industry, with coverage of most major US markets.

While the Yellow Pages are an excellent reference tool, they fare less well when considered as an advertising medium. For one thing, consumers expect and even welcome 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% wanted to see more advertising!! This ad clutter may suit shoppers, but it also means your ad is less likely to stand out. Moreover, a Yellow Pages ad is only seen after shoppers have already made a purchase decision and are comparison shopping.

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%) and business has at least one copy of "the book."²

Usage: Almost three out of five (58%) of all adults say they check the Yellow Pages for a phone number and/or address at least once per week, with 77% using the book monthly.³

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, 57% do not know from which store or business they will buy prior to looking in the directory.⁴

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% will not see your ad.⁵

Minimal Consumer Awareness: Since the Yellow Pages are typically used 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 need to 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 — which is where most purchases are made. How many pay phones have you seen that have a complete phone book?

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 constantly changing business conditions. Audiotex does allow some upgrading, but many shoppers have never heard of Audiotex.

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.

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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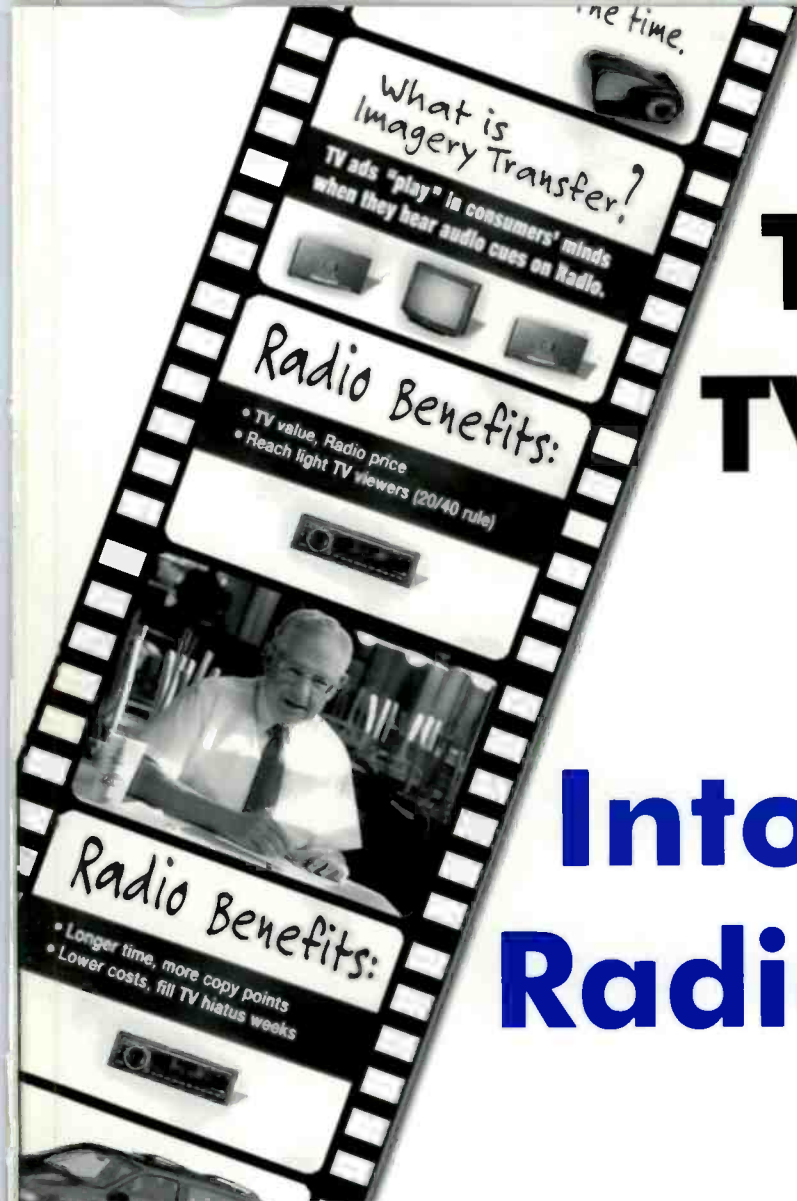
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