

October 2009



NATIONAL MEDIA SURVEY

THE NATIONAL MEDIA SURVEY OF TELEVISION COMMUNITY SERVICE DIRECTORS
Addressing Public Service Advertising Issues, Practices, and Social Responsibility

OVERVIEW

OVERVIEW

Public Service Advertising plays an important role informing, shaping and changing knowledge, attitudes and actions of the American Public. The National Media Survey of Television Community Service Directors examines the needs, practices and perspectives among media directors, those gatekeepers who select much more than mere ads but what social issues will be addressed in their communities.

Since the last National Media Survey(Fall, 2008) much has changed. Americans have been besieged by recession, layoffs, loss of healthcare, and mortgage woes. Communities have felt the pinch of the worst economy since the Great Depression ...

And, communities proudly and enthusiastically voted for “change” in the presidential elections. America's first black President is bringing not just a radically different style but radically different policies and issues to the public forefront.

The survey looks at how media directors view: 1) the impact of the recession; 2) the issues and audiences they want addressed to their communities and stations viewers, including those highlighted by President Obama in his address to Congress (Spring, 2009); and 3) best practices in social marketing and public service advertising.

On recession

There isn't very much good news in a recession. But there is a silver lining for public service advertising. If ever there was a time to release public service advertising materials, now might be it. Less paid-advertising demand seems to translate into a greater supply of timeslots for Public Service Advertisements (PSAs). So PSA airtime availability is the one thing in this recession that is not going down but in many places is going up.


On the new Administration and the issues

The raging health care debate in this country is reflected in the news coverage nightly and is top-of-mind for most Americans, including media directors. Among the issues that President Obama has brought before Congress and the American public, of those tested, health care coverage is most cited by media directors as important to viewers. Parenting skills, high school graduation rates, and energy conservation are also priorities. Surprisingly, when asked about issues government should address in public service campaigns, economic and financial issues fell in importance relative to the previous National Media Survey. Education was most important. We can only speculate why. Was it a back-to-school mindset in late summer? Or a greater acceptance of recession and its impact on our lives?

Another point of interest concerns seniors. Media directors indirectly, by their relative low ranking of seniors' issues, suggest that “demand” for seniors' issues is not keeping pace with the aging demographics of our society. It may be no wonder that if stations are less inclined to give media exposure to seniors' issues than to so many other issues, non profit organizations are not “supplying” many PSAs addressing this target. Perhaps, as our population continues to age, demand will build to drive supply.

On best practices

Media directors stay in close touch with their viewers and the issues important to their communities. In evaluating the strengths of public service advertisements and campaigns, they look first and foremost to assess if the topic is relevant and urgent. Which is why the National Media Survey is important. It is helping those of us in the field understand better the issues likely to grab the attention ... *and* airtime of our media stations.



Eva Kasten
President and Founder
Noral Group International, Inc

SUMMARY

EXECUTIVE SUMMARY

Television Media Directors...¹

On recession

- Overwhelmingly, media directors say the amount of Public Service Advertisement (PSA) time their stations will provide, given current economic conditions, will either increase or stay the same. The increase in some cases is considerable.

On the new Administration and the issues

- As Noral reported in December, media directors in 2008 cited issues related to the economy as most important for the government to tackle in public service advertising. In the summer of 2009, the focus turned to education. The environment has been consistently valued highly over both time periods.
- In addition to health care, President Obama's policies and speeches have raised the profile of issues previously not picked up in the National Media Survey, such as parenting skills. Not only does this issue factor heavily among all media directors generally, but parenting skills is the leading issue among those media directors most devoted to "doing good": those directors that identify PSAs as extremely or very useful and those who say they will increase PSA time.
- Media directors again note a different role for government than other non-profits when it comes to PSAs. Media directors think it is the job of our government to let people know about federally funded services and benefits available to help the public. Meanwhile, they think it is the job of stations' themselves to support the local efforts of non-profit community-based organizations.
- Kids and families rank among the most important issues generally. Media directors want PSAs on issues that affect kids and families; and kids are the most underrepresented audience, a consistent finding.
- Seniors' issues are outperformed by all other rated issues. On measures of what issues media directors' stations wish to support and what issues they wish our government to address, seniors' issues ranked last.

On best practices

- The relevance/urgency and clarity of the messaging are the factors that make a PSA campaign stand among the best. Media directors want the important information to get out and they want to make sure, as long as they are giving it exposure, that their viewers will "get" the message.
- Stylistic factors matter less, including, the use of a spokesperson or humor. Media Directors are a very sincere group of people, by these responses.
- And they believe in what they do: public service advertising is useful.

¹ "Television Media Directors" is used in this report to collectively refer to respondents, and includes a range of titles, predominantly Station Manager, Community Service Director, and PSA Director.

FINDINGS

FINDINGS ON RECESSION

- > > Even in recessionary times, a remarkable 84% of media directors foresee the amount of time allotted for PSAs at their stations will increase or at least remain the same; 24% are expecting an increase, well out-numbering those expecting a decrease.

FIGURE | 1

With the current economic conditions, how will the amount of PSA time provided by your station change?



0% 10 20 30 40 50 60 70 80 90 100

Percent of Respondents:

Increase more than 20% Increase 11-20% Increase 1-10% Not at all Decrease 1-10% Decrease 11-20% Decrease more than 20%

Most media directors, six in ten, say PSA time will hold stable. One in four project an increase in PSA time (a segment we will break out in other results when noteworthy), almost two-thirds more than those who project a decrease.

Those saying PSAs are extremely or very useful are two times more likely to forecast an increase than a decrease.

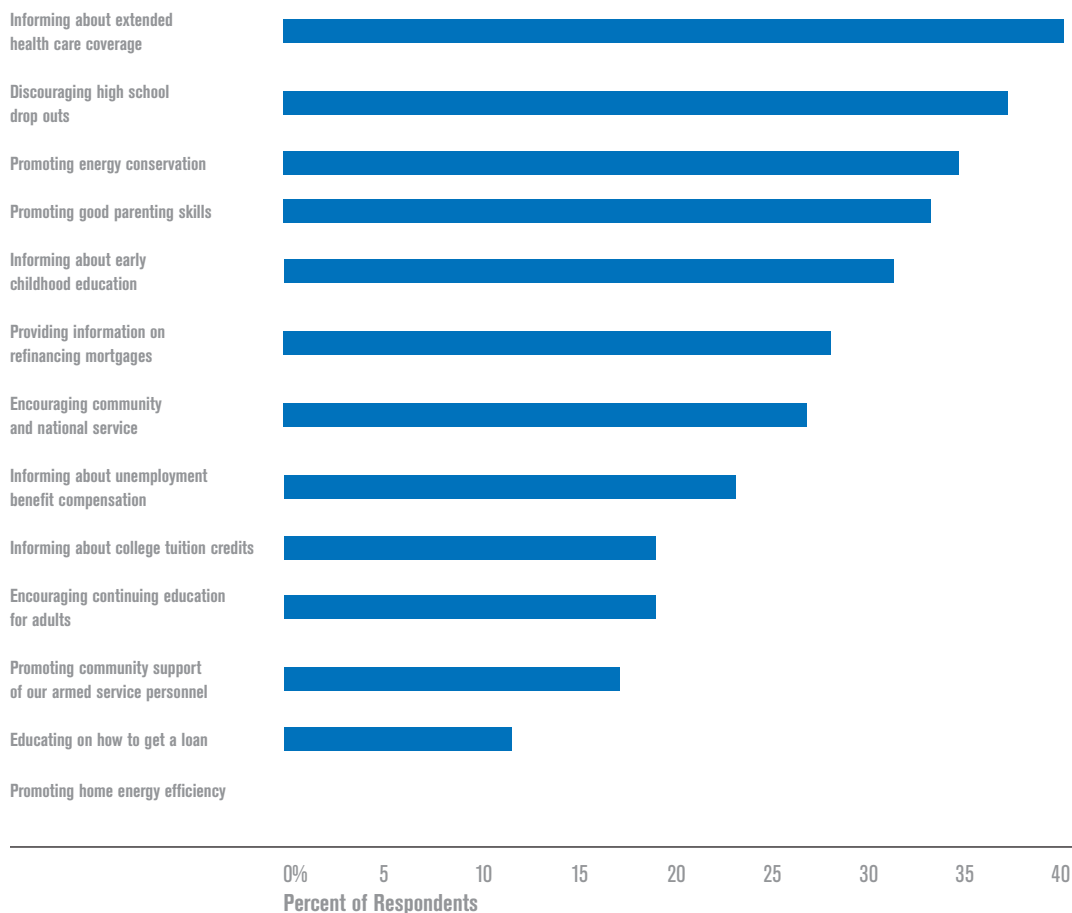
FINDINGS

FINDINGS ON THE NEW ADMINISTRATION AND THE ISSUES

> > Among the issues President Obama raised to Congress; health, education, conservation, and parenting issues are seen by media directors as most important to viewers.

FIGURE | 2

In President Obama's speech to a joint session of Congress, he mentioned his desire to tackle many issues important to our communities. Which do you believe are most important to your viewers?



4 in 10 say that “informing about extended health care coverage” is most important to viewers, making it number-one on the list, at a time of national debate over pending health care legislation.

Over a third of PSA directors believe each of “discouraging high school drop outs,” “promoting energy conservation,” and “promoting good parenting skills” is important to their viewers. In fact, 62% choose one or more of the children-related issues mentioned by President Obama – “discouraging high school drop outs,” “promoting good parenting skills,” and/or “informing about early childhood education” – putting this combination ahead of all other issues.

“Promoting good parenting skills” is the leading issue among those saying PSAs are extremely or very useful. Similarly, those saying they will increase PSA time are also more likely than others to choose “promoting good parenting skills.”

FINDINGS

FIGURE | 3

Verbatim Responses on Issues Most Important to Viewers

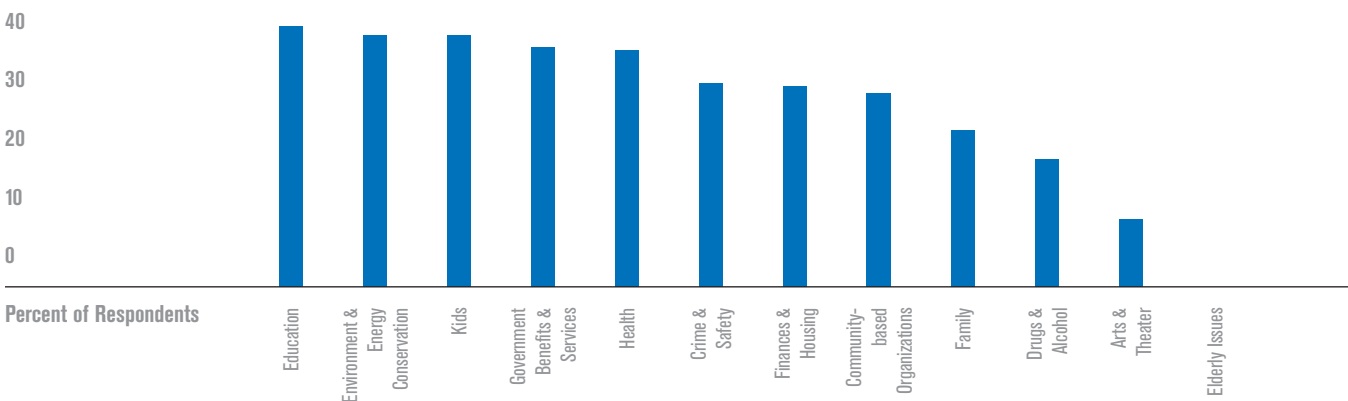


- “Good people begin with good parents.”
- “Health care is for all citizens. To advance America we need good education and to come together as a country we need to help one another.”
- “Energy conservation is an undeniable worthwhile cause regardless of the belief in global warming, etc. We are on a finite plane with very finite resources as of now.”
- “Health care is a big issue right now with the “new plan.” I think everyone wants to know what it means for them (in easy-to-understand terms).”
- “Parenting and education are vital.”
- “Everyone needs health care. Education will help with many of the other issues.”
- “Unfortunately, we hold one of the highest high school dropout rates. We need to get more involved and educate others about the importance of education.”
- “We live in an area with a low median income, and keeping kids from turning to crime is a big task, and if we can keep them in school and get the skills they need to stay away from crime.”
- “We have higher than the average national unemployment rate, higher rate of high school dropouts and a glut of homes that fell due to Fannie Mae and Freddie Mac loans that never should have been made.”
- “Parenting is the most important issue because good parenting leads to good citizens.”

>> **Media directors say the issue they would most like our government to address in PSAs is education.**

FIGURE | 4

Which of the following issues would you most like the GOVERNMENT to support with public service advertising?



When asked what issues government should support with public service advertising, media directors put education atop the list, a big rise after it was ranked seventh in Noral’s last National Media Survey (available at www.noralgroup.com/news/reports).

Environment & energy conservation and kids issues are ranked second and third by media directors, as in the last study, with over a third of respondents each.

Health issues are fifth overall but rank number-one among those saying they will increase PSA time. Finances & housing drops to seventh place after finishing first in Noral’s last study.

FINDINGS

FIGURE | 5

Verbatim Responses on Issues Government Should Support



“The government is better at supporting information for larger, national issues such as environment & energy conservation, education, and government benefits & services.”

“The children are our future, we need to make sure that they are educated and given all of the opportunities that are available to them. Also, health care is a big issue that affects everyone.”

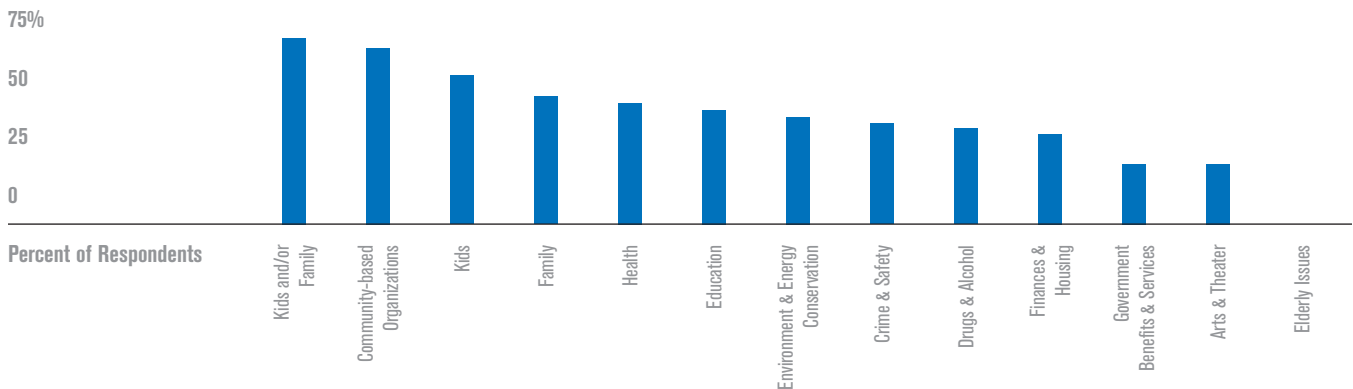
“I am still focused on child-related issues.”

“We would like to see the Government support all of the above issues; however the top three include kids, health, and environment & energy conservation.”

>> **After local organizations, media directors most like to support kids and family issues with public service advertising, in line with Noral’s previous National Media Survey.**

FIGURE | 6

Which of the following issues would your station most like to support with public service advertising?



As expected, due to their local nature, community-based organizations’ issues receive the most station mentions, with over six in ten media directors selecting this choice.

Among specific issues, however, kids’ issues are top-ranked, as in our prior study, followed by family issues. In fact, 65% of PSA directors select one or both of these answer choices, vaulting the combined “kids and/or family” ahead of community-based organizations.

Health and education issues are each supported by over a third of respondents. Media directors saying they will increase PSA time are more likely than other respondents to choose education issues.

FINDINGS

FIGURE | 7

Verbatim Responses on Issues Stations Would Like to Support

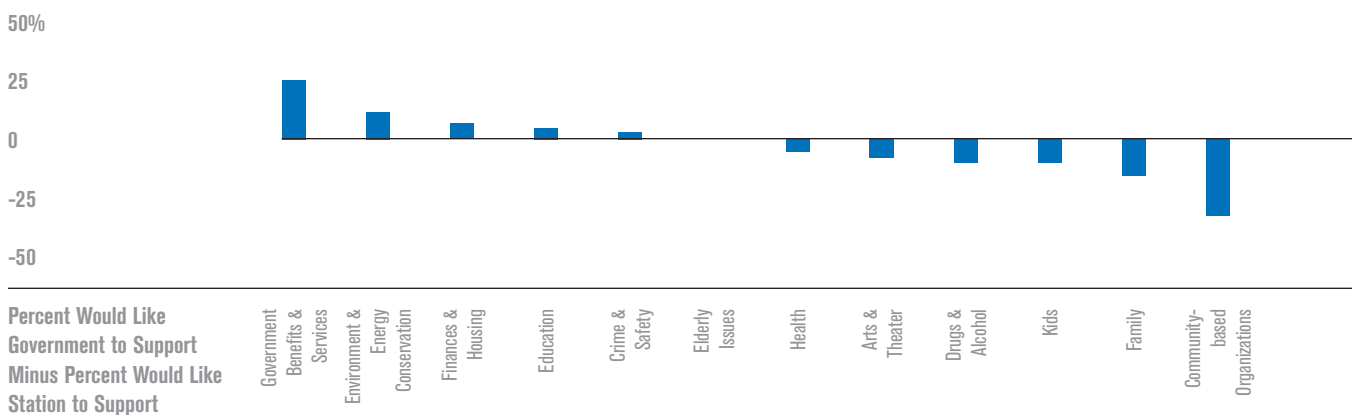


- “I always give priority to local community based organizations.”
- “We prefer to air PSAs that tie in to a local agency, such as Heart Association, Cancer Society, and Partnership for a Drug Free Iowa.”
- “Normally we go with local organizations and issues before anything national. What would be great is to supply a tag-able version to PSAs so a local organization can be mentioned in the message.”
- “Local organizations and causes will always take priority over National campaigns.”
- “All the issues above utilizing local community based organizations. If we have a choice between a national and a local, we will always choose the local.”
- “Education and family are important here.”
- “Education and family issues are important to our local community. We always support local PSA efforts first, then national issues.”
- “Children, family and education go hand-in-hand.”
- “We are about to launch a health initiative around kids’ wellness.”
- “Families are very important to our market.”
- “We are a child-centered station, attempting always to address issues of concern to parents and families.”

> > **Media directors have different opinions on what issues they would like to support generally versus what issues they would like the government to support.**

FIGURE | 8

Difference in Issues Stations Would Like to Support and Issues that PSA Directors Would Like Government to Support



Media directors rated issues associated with community-based organizations more highly when asked about what their stations wanted to support than when asked what issues they wanted their government to support.

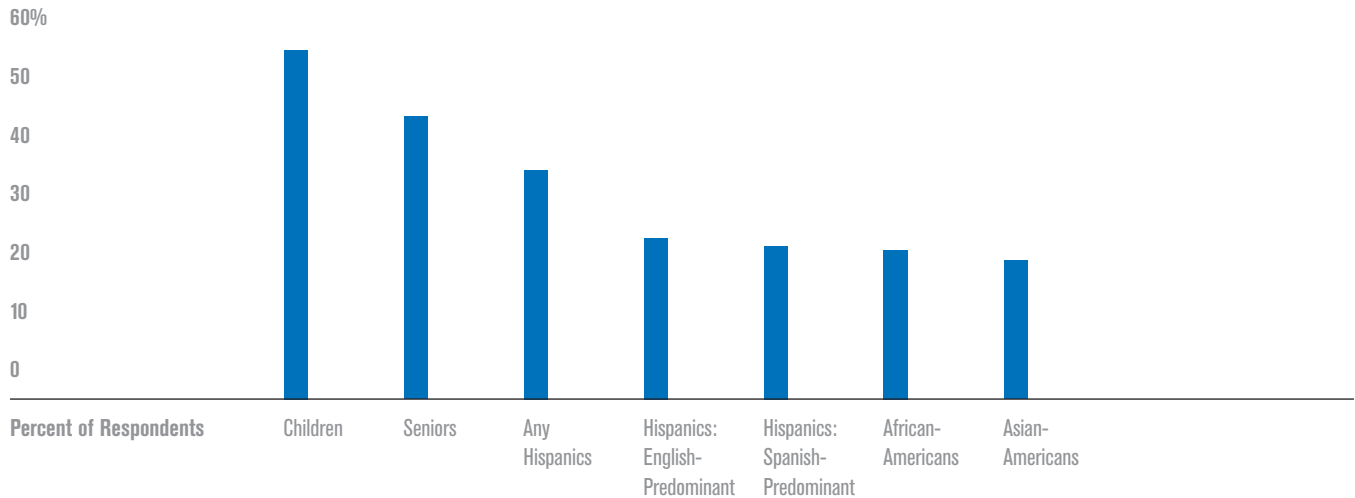
Government benefits & services are named by one in three respondents when media directors are asked what issues stations would like government to support, almost 20 percentage points higher than when asked what issues they want to support generally.

Both of the above findings are intuitive and very much in line with expected roles for stations (to serve their community base) and governments (to inform citizens of available programs).

FINDINGS

>> **Media directors say children and seniors are the most under-represented audiences among groups targeted by PSAs, consistent with our past research.**

FIGURE | 9 For which target audiences do you not receive enough PSAs?



Children are again the most frequently chosen demographic when media directors are asked for which target audiences they do not receive enough PSAs. Over half of all respondents agree, even more than in the prior National Media Survey.

A third of media directors select one or both of the answer choices relating to Hispanics – Hispanics: English-predominant and/or Hispanics: Spanish-predominant – putting the “Any Hispanics” combination solidly ahead of other ethnicities.

Seniors are the second most frequently cited target for whom media directors say they do not get enough PSAs. The apparent demand for PSAs targeting seniors, however, does not match the perceived lack of supply. Seniors’ issues were rated lowest in importance for the government to address in PSAs and among the issues stations would most like to support (Fig. 4 and Fig. 6).

FIGURE | 10 Verbatim Responses on Under-represented Audiences



“We need to run these in children’s programming. Most of them have commercial ties or web ties and can’t run during that time. We need more good children’s PSAs.”

“Our station is always looking for spots targeting kids.”

“All the children-targeted PSAs we receive seem to be about staying off drugs. The children-focused PSAs are aimed at parents. What about some spots targeted to children that talk about volunteering, reading, etc.?”

“We must air these during children’s programming and the same ones air a lot.”

“Seniors rely on TV for information because not all seniors have internet access or know how to use it.”

“We only receive 1 or 2 PSAs aimed at seniors every 6 to 8 months.”

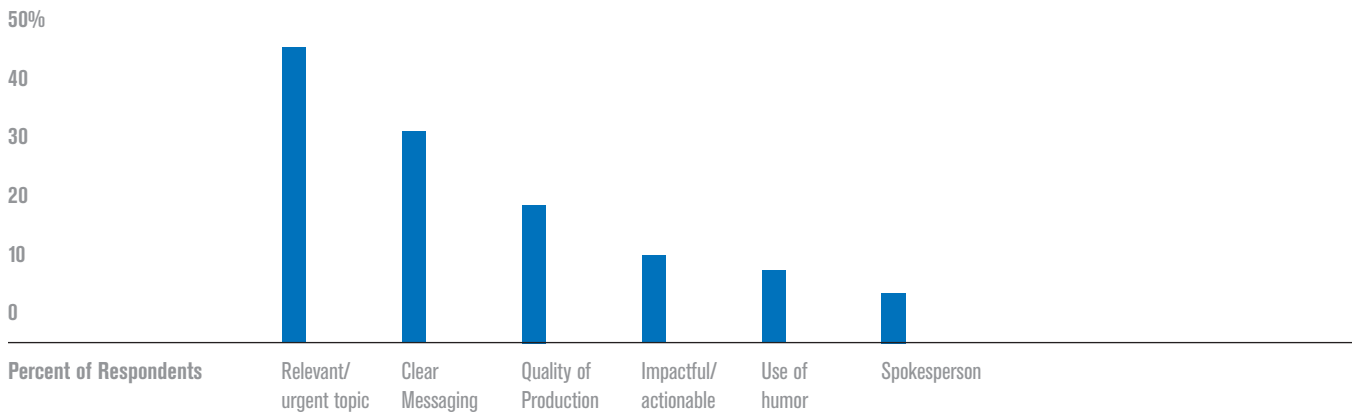
“Seniors are an important part of society with many issues.”

FINDINGS

>> FINDINGS ON BEST PRACTICES

Media directors say that a relevant, urgent topic and clear messaging are the most important features that make a strong public service advertisement.

FIGURE | 11 What made the best PSA campaign that you recently supported, the best?



Media directors most often mention the relevancy and urgency of the topic when describing what makes the best campaign. Over a quarter of respondents point to clear messaging as the key feature of the best PSA campaigns. One in six media directors say that the quality of production is the deciding factor.

FIGURE | 12 Verbatim Responses on Best Features of PSAs



- “Focused on a major issue here.”
- “It is an important and timely issue.”
- “The campaign has a timely message and very good PSAs.”
- “The ads are relevant to our area.”
- “They are desperately needed.”
- “It is supporting a good cause.”

FINDINGS

>> **Almost every media director says that public service advertising is useful, and most feel it is very or extremely useful.**

FIGURE | 13

How useful do you think public service advertising is?



0% 10 20 30 40 50 60 70 80 90 100
Percent of Respondents:
Extremely useful Very useful Somewhat useful Not useful

Two-thirds of media directors say that public service advertising is extremely or very useful.

This sentiment is even stronger among those projecting an increase in PSA time; PSA directors in this group are 17% less likely to select the bottom two ratings.

FIGURE | 14

Verbatim Responses on Usefulness of PSAs



“As broadcasters we are glad to devote our free time to charitable causes [because PSAs are extremely helpful].”

“I feel PSAs that point to solutions on the local level – through local agencies and NGOs – are the MOST effective.”

“[Very effective;] of course, a great deal rides with the creative and the relevancy of the message.”

“PSAs are very useful for local entities.”

“[I think they are great.] Unfortunately, most TV stations use PSAs as time filler.”

“PSAs are somewhat useful. The impact depends on the issue and use of creativity”

“Most messages are depressing. Even if the subject is difficult there must be a positive message. People watch TV to escape. Work within that landscape.”

“Their usefulness depends on the air time.”

“Localized PSAs tied into station-related causes are extremely useful to cross-branding; however, national campaigns with very small local connectivity tend to be less useful. But they are good for fill on slow news or sales months.”

“Unless there’s good production value and a good, clear message, I think the public tunes them out.”

“My main criteria are to make sure the message is to our viewers, what benefits them, and what good does it do. It is hard to measure, and I don’t get much feedback on it, [so I say PSAs are somewhat useful].”

APPENDIX

APPENDIX

About the National Media Survey

- Conducted by Noral Group International, Inc. from June 3 to August 6, 2009.
- Noral called media directors, community service directors, or other managers at U.S. broadcast television stations.
- Contacted broadcast television station personnel were asked to complete an online questionnaire hosted by www.SurveyMonkey.com.
- Responses were gathered from station personnel at 131 television stations.

About Noral Group International, Inc.

- Noral Group International, Inc. is a research-based public service advertising and social marketing firm in Washington, D.C. With unique knowledge and a ten-year proven track record, Noral delivers results for clients in the government, non-profit, and commercial sectors who value change for the public good.