



# OVERVIEW

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The National Media Survey looks at the opinions of media directors at broadcast stations across the country to assess: 1) the social issues they believe are important to their communities, and 2) the role their stations, the government and public service advertising can play in affecting lives. Since Fall of 2008, the survey has taken a snapshot of television media directors' views. This quarter's survey is the first to ask radio media directors<sup>1</sup> to state their specific interests and needs.

### On health and the issues

The concerns of radio media directors about their communities' residents came through loud and clear: health, health, and yes, health.

Granted, it would have been hard for anyone, including radio media directors, to avoid the drone of news coverage on the health care debate occupying most of Capitol Hill and Pennsylvania Avenue. But was that enough to explain the health myopia among radio media directors? Only the next National Media Survey of radio media directors will help answer that question.

Importantly, the survey underscores a very consequential role for public service advertising as it pertains to health. After running through the top diseases afflicting members of their communities, radio media directors shifted focus to human behaviors associated with those diseases. These ranged from a person acting on a prevention related service (i.e., vaccination or screening programs) to modifying lifestyle choices (i.e., not smoking, eating healthy, exercising.) And while human behavior may be hard to influence, it is possible and public service campaigns are one proven means to that end.

### On the importance of being local

Radio thinks, acts and "surveys" local. Like their TV counterparts, radio media directors said they most wanted their stations' to support their local community organizations and the issues they represented. They put a priority on helping out locally, first and foremost, regardless of the issue.

Radio media directors also put greater emphasis on the importance of a call-to-action or outcomes to public service advertising, saying that actionable public service campaigns were the "best." This seems to suggest that the loftiness of a campaign's issue may be not as important as its efficacy: actually "making a difference" directly and immediately in the homes of their neighbors.

### On practices

Radio media directors are committed to what they do and committed to making the recession work to the benefit of their communities. Not only do they believe public service advertising is very or extremely useful, they anticipate their station will either increase or maintain their level of support. So while times are tough, it's just not the case for public service advertising.



**Eva Kasten**  
President and Founder  
Noral Group International, Inc

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<sup>1</sup> "Radio 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.

# SUMMARY

## EXECUTIVE SUMMARY

### On the issues

- Radio media directors ranked community-based organizations (and the issues they support) as the issues most important to them. This focus on all things local was reported by their television counterparts as well in a prior survey.
- Health issues were however very prominent among their specific concerns. Health issues ranked as the most important specific issue for their stations to support among radio television directors. Among the issues they wanted our government to take on with public service advertising, again, health concerns topped the list.
- Seniors were the audience most under-served by radio PSAs. All ethnic groups tested were named by about a quarter of respondents as under-served as well.

### On health specifically

- When asked to discuss specific health issues important to their community and listeners, most radio media directors named actual diseases. Circulatory diseases (such as heart ailments and strokes) topped the list, followed by cancer, diabetes, and cold and flu, driven by the H1N1 scare this season.
- Health issues associated with lifestyle choices or behaviors were mentioned next most frequently. Among them were smoking, drugs and alcohol and dietary matters, including overeating.
- Prevention of disease (screening, awareness, vaccination) featured prominently as well.
- Finally, in the midst of the health care debate, issues of access received mentions, albeit to a lesser extent. These comments were led by insurance coverage and Medicare, but also included affordability and cost issues.

### On practices

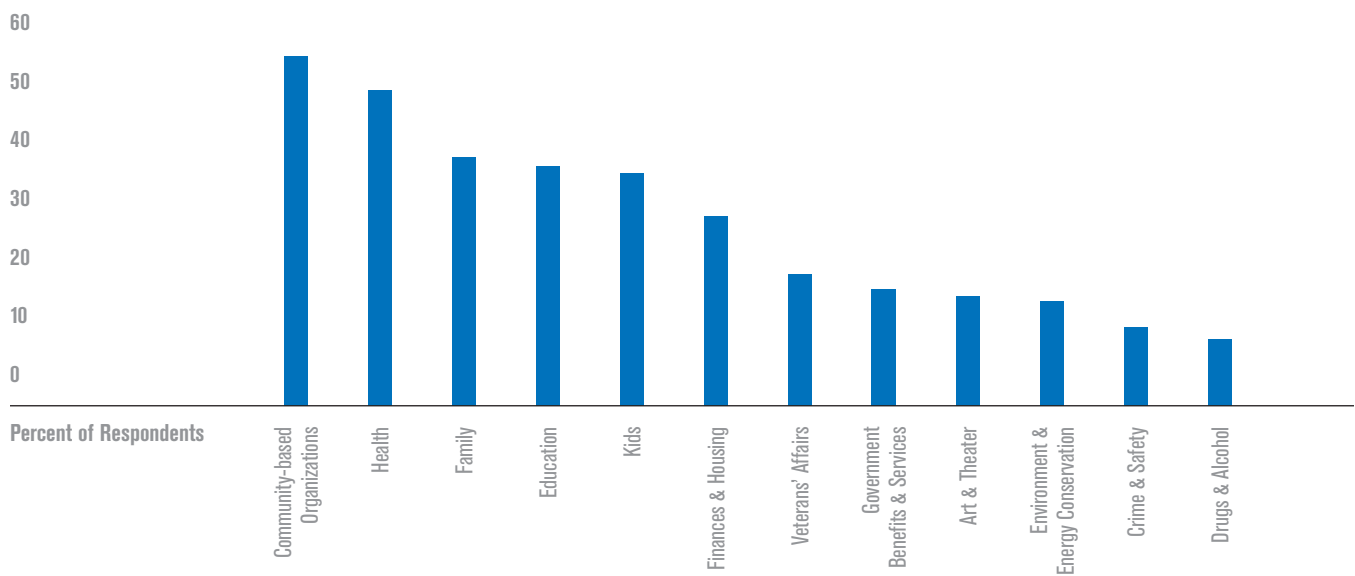
- Overwhelmingly, radio media directors believe that public service advertising is very or extremely useful.
- The most frequently named attribute that makes public service advertising effective was the impact and action-ability of the campaign. The relevance and urgency of the topic to their community was the second most cited factor in making PSA campaigns the “best.”
- Even more so than television media directors this past year, radio media directors said the amount of time their stations will provide, given economic conditions, will increase or stay the same. Exposure was projected to be strong across all day parts, with a slight increase in the evening, early morning and weekend. Only longer length PSAs (:60's) were projected to see some weakness in support.

# FINDINGS

## FINDINGS ON THE ISSUES

- >> After local organizations, media directors liked most to support health issues with public service advertising.

**FIGURE | 1** Which of the following issues would your station most like to support with public service advertising?



Consistent with findings from a previous study of TV media directors, radio media directors ranked community-based organizations as the most important for their station to support, with over half of respondents listing them among their top three priorities (below the 62% of TV media directors that made that choice).

After community-based organizations, more radio media directors – nearly half – chose Health when ranking the top three issues their station would most like to support with public service advertising.

Family, education and kids were the next most-frequently ranked issues.

# FINDINGS

FIGURE | 2

## Verbatim Responses on Issues Stations Would Like to Support



“Health is a pressing issue and concern for the [audience] I represent, which is women 24 and up: health insurance at low cost, treatment, and preventive care because it affects the entire family.”

“Health is top concern of people we talk to in the community: how to have better health, insurance coverage, etc. When your health goes, it’s harder to think of anything else.”

“Health is a key issue of life and we are getting the audience in tune with taking care of themselves.”

“Family and kids are the central point of everything. People need to spend time with their kids and on family activities.”

“We are a family-owned and operated chain of radio stations so issues involving kids are very important to us.”

“Education in California is lousy at best, and kids are our future.”

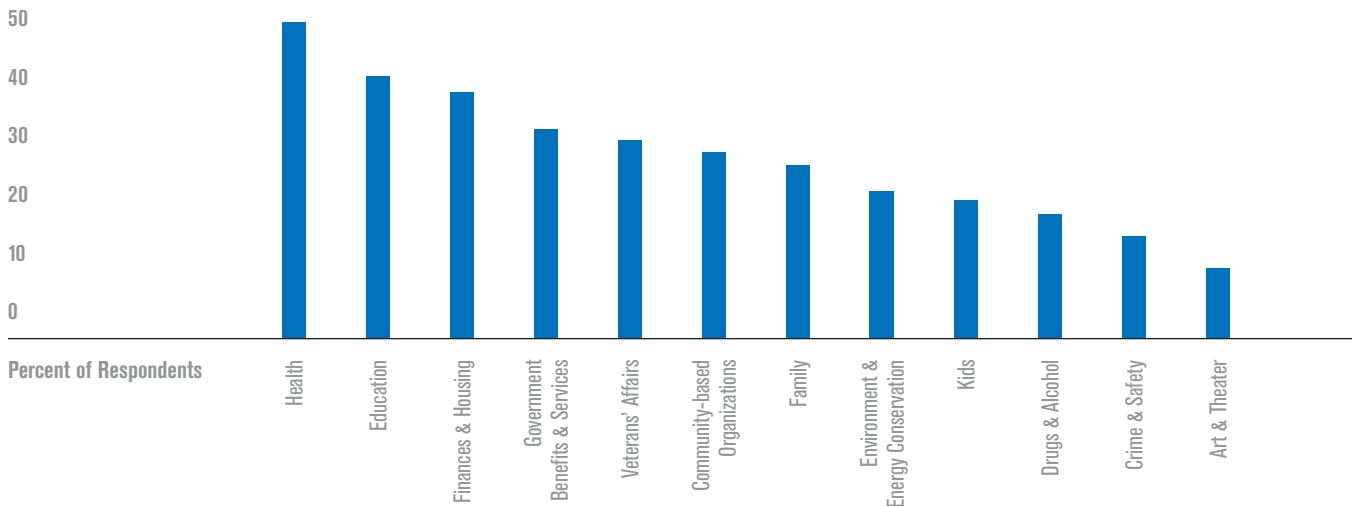
“We play anything to do with teaching our children: the next generation is the most important thing.”

“Since we are such a small community, we focus on kids – which are the most important thing in the community – and activities are aimed at getting kids involved.”

> > **Media directors most wanted for the government to take on health issues with PSAs, the first time in the National Media Survey that the same issue has been ranked so high for both station and government priorities.**

FIGURE | 3

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



Health also led the rankings of specific issues that stations would most like the *government* to support with public service advertising, with 48% of respondents ranking it among their top three issues. Interestingly this was substantially more than among TV media directors previously surveyed, 33% of whom chose Health.

Education ranked second overall (39%), with finances and housing third at 37% of respondents.

When comparing the issues ranked for government to support vs. those for stations to support, a distinctive role for the government in public service communications emerged. Veteran’s Affairs and Government Benefits & Services were ranked much higher for government support, as was Finances & Housing.

# FINDINGS

FIGURE | 4

Verbatim Responses on Issues Government Should Support

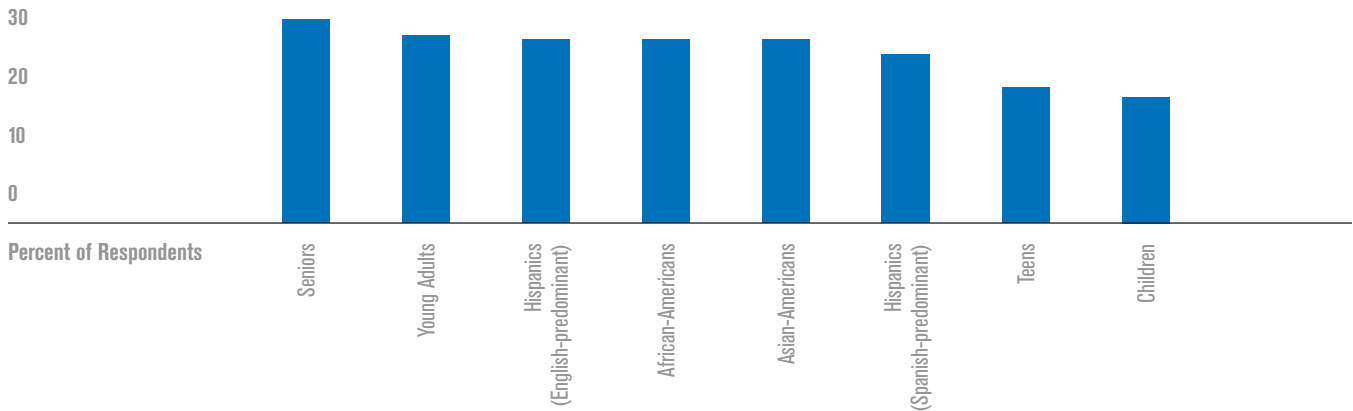


- “Once again, health is an ongoing issue.”
- “Health for everybody is important.”
- “Government needs to do more with health.”
- “Has to do with being a small community: health is very important to our aging population.”
- “The issues are big in the public with all the healthcare debates.”
- “Education is necessary for our nation to prosper as a whole.”
- “States need more education PSAs; they are rare.”
- “Government should pay attention to mortgage issues and finances.”
- “Government should educate the masses on ways to be more frugal with their finances.”
- “The government recently passed new laws on credit card laws and we would have never known about it if someone hadn’t told us. I’d like the government to keep us abreast of bills and what they mean.”

> > **Media directors said seniors were the most under-represented audience among groups targeted by PSAs, up from second-place in prior surveys.**

FIGURE | 5

For which target audiences do you not receive enough PSAs?



Seniors topped the list of audiences for which radio media directors do not receive enough PSAs, with 28% of respondents choosing this demographic. Children lagged at just 14%.

That is not to say, however, that youth were not on the minds of media directors. If Children and Teens were combined, that audience was chosen by 22% of radio media directors. Also interesting, Young Adults ranked second behind Seniors.

All four ethnic audience choices – African-Americans, Asian-Americans, Hispanics (English-predominant language), and Hispanics (Spanish-predominant) – were named by about a quarter of respondents.

# FINDINGS

FIGURE | 6

Verbatim Responses on Under-represented Audiences



“Our target audience is always seniors, 50+. That is what we aim for.”

“They lose out because the focus is on kids and seniors miss out.”

“It seems we get more youth oriented PSA's when the majority of our community is 55+.”

“Perhaps organizations aren't targeting the 55+ demographic because they believe that financial support is coming from younger generation.”

“PSAs focus on the broad issues and leave out day-to-day issue that seniors face like what to do in cold weather and transportation issues; it's the small things.”

“A lot of material that we get is focused on early childhood and secondary, and then it drops off after young teenage years.”

“You can never get too much information out to young people, as they are a developing community and are in need of health related issues, such as birth control.”

“23-28 demographic is often overlooked. What people that age are really wondering about is buying their 1st home, paying off college debt, and raising children. They are not averse to being educated, but have zero time to think about it.”

“We don't run anything (because we're not receiving them) specific to ethnic minorities.”

“The research isn't there for African American PSAs to serve the community. There is a lot that is generic, but when you have so much generic, you lose specific information along the way. There needs to be more focus on the racial group to make the message stronger.”

“There is a large Hispanic base but very few PSAs. They are very under-served.”

“The demographic numbers are there for the Hispanic market but the production value is worse than other PSAs. There is not nearly enough 10-2 ratio.”

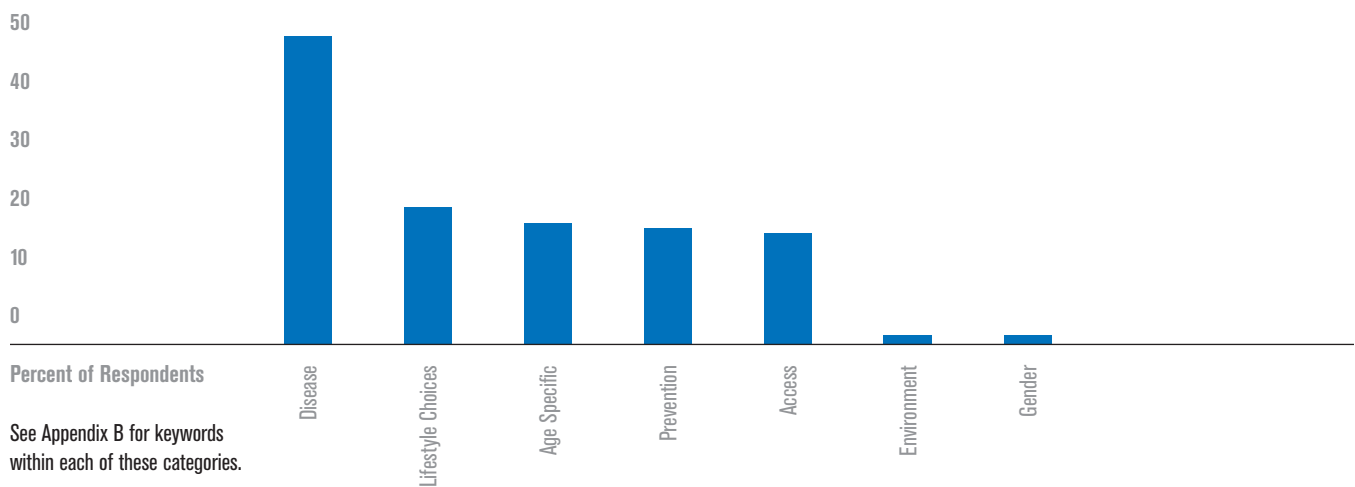
# FINDINGS

## FINDINGS ON HEALTH ISSUES

- > > **Media directors said health-related issues important to their communities included numerous specific diseases but also lifestyle and prevention issues.**

FIGURE | 7

Focusing on health, what health-related issues are important to your community?



Diseases were the most mentioned health issue by radio media directors, with more mentioning circulatory diseases (heart, stroke, hypertension) than any other type. Health problems associated with lifestyle choices (smoking, drugs, alcohol, over-eating) characterized the second most frequently mentioned category of issues, followed by prevention issues (awareness, screenings, vaccinations). Age was mentioned in conjunction with the cited health issue in many cases, with one in eight including an age reference to mostly seniors but also children.

Issues of access were mentioned relatively infrequently, in the context of the health care debate on these very points. Among those mentions were insurance coverage and Medicare and cost factors.

# FINDINGS

## FINDINGS ON PRACTICES

- > > **As with prior surveys, almost every media director said that public service advertising is useful, and most felt it is very or extremely useful.**

**FIGURE | 8** 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

Six in ten radio station media directors said that public service advertising is very or extremely useful.

**FIGURE | 9** Verbatim Responses on Usefulness of PSAs



“It changes opinions for people, whether they want to hear it or not. If people hear anything often enough, it’s going to sink in.”

“It gets the word out for people who don’t think about that kind of stuff. The national ones are issues that people need to pay attention to and the local PSAs try to get the word out on an organization that doesn’t have the funds for a national campaign.”

“PSAs allow the average listener to become aware of or learn more about issues that could be of importance to their community, their neighbors, or their family.”

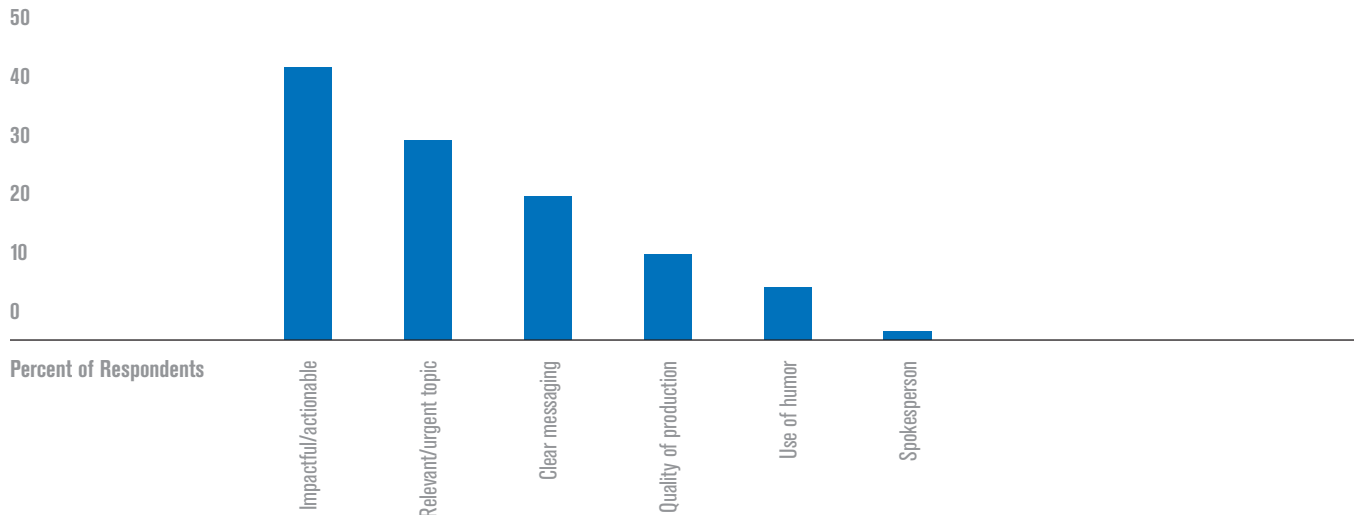
“PSAs get people’s attention and encourage them to think about things they normally would not.”

# FINDINGS

>> **Media directors said that high potential for impact and action was the most important distinction of the best public service advertising campaigns.**

FIGURE | 10

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



Radio media directors indicated that the best campaigns were those that had impact and were actionable. A relevant and urgent topic and clear messaging were next in importance.

Relative to a TV media directors, radio media directors placed a higher priority on the advertising call to action. TV media directors ranked impactful/actionable as only the fourth most important attribute of effective campaigns, in a previous study.

# FINDINGS

- >> **With continued tough economic conditions, even more media directors than their TV counterparts surveyed last year foresaw the amount of time for PSAs at their stations increasing or remaining the same.**

FIGURE | 11

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%

In continued difficult economic times, an amazing 97% of respondents said that PSA time provided by their station would increase or stay the same.

This was an even stronger showing (+12 percentage points) in support of PSA air time than among TV media directors this past spring.

What's more, a third of radio media directors who saw an increase in time projected an increase greater than 10%.

- >> **There were few changes in the spot formats that media directors expect to devote to PSAs; support for the 60-second format is projected to decrease slightly.**

FIGURE | 12

How will the amount of PSA time provided by your station in the following PSA lengths change?



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

Percent of Respondents: Increase Not at all Decrease

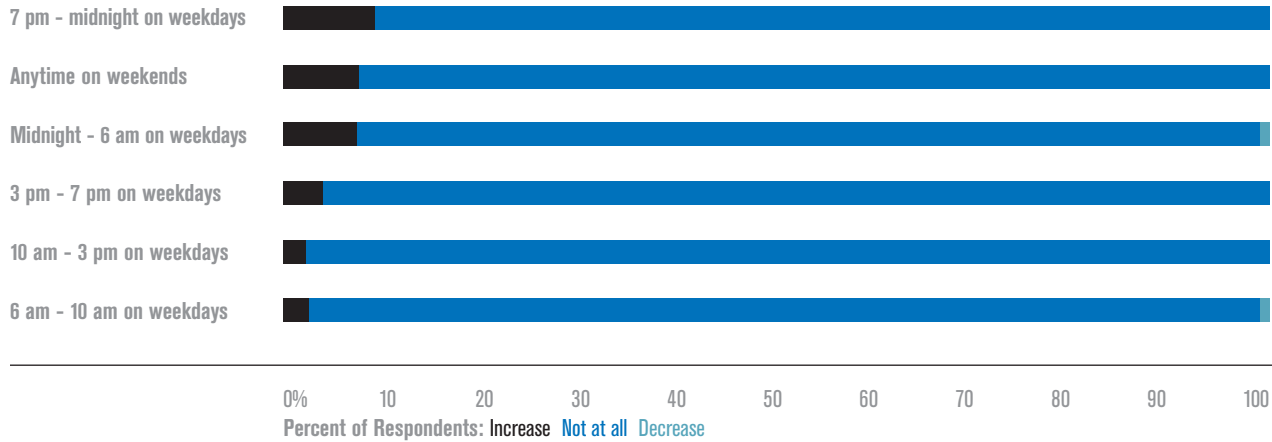
Among PSA lengths, time for only 60-second ads was projected to notably decrease, while airtime for on-air reads, 30-second ads, and shorter lengths was forecast to be nearly the same.

# FINDINGS

>> Among radio day parts, weekends and 7 pm-6 am weekdays were projected by media directors to include slightly more PSA airtime.

FIGURE | 13

How will the amount of PSA time provided by your station in the following day parts change?



Media directors anticipated relatively little change in the day parts in which PSAs would run. Among those day parts where some respondents noted change, weekdays 7pm-midnight and midnight-6am and weekends were forecast to offer relatively more PSA airtime.

# APPENDIX

## APPENDIX A

### **About the National Media Survey**

- Conducted by Noral Group International, Inc. from November 30, 2009 to January 8, 2010.
- Noral called media directors, community service directors, or other managers at U.S. broadcast radio stations.
- Responses were gathered from station personnel at 103 radio 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.

# APPENDIX

## APPENDIX B

FIGURE | 14

Focusing on health, what health-related issues are important to your community?

Category	Keyword (or word root; in order of mentions)	Percent of Mentions
Disease	cancer	9.7%
	diabet-	9.7%
	heart	8.3%
	h1n1	4.1%
	flu	3.7%
	stroke	3.2%
	pressure	1.8%
	aids	1.8%
	alz-	1.4%
	sickle	0.9%
	cold	0.5%
	parkin-	0.5%
	mental	0.5%
	<b>Disease Total</b>	<b>46.1%</b>
Lifestyle Choices	obes-	5.5%
	eat	4.1%
	smok-	2.3%
	drug	2.3%
	alcohol	1.8%
	diet	0.5%
	substance	0.5%
	food	0.0%
	<b>Lifestyle Choices Total</b>	<b>17.1%</b>
Age Specific <sup>2</sup>	child	4.1%
	senior	2.8%
	old	1.8%
	elder	1.8%
	aging	0.9%
	kid	0.9%
	pedia-	0.5%
	<b>Age Specific Total</b>	<b>12.9%</b>

<sup>2</sup> While "age-specific" keywords were not health issues per se, this category aggregates instances in the answers given to this open-ended question when age was mentioned in connection with a health issue; answers can count toward more than one keyword and category.

# APPENDIX

## APPENDIX B (Continued)

FIGURE | 14

Focusing on health, what health-related issues are important to your community?

Category	Keyword (or word root; in order of mentions)	Percent of Mentions
Prevention	prevent	4.6%
	screen	1.8%
	aware	1.4%
	information	1.4%
	wellness	0.9%
	vaccin-	0.9%
	test	0.5%
	immuniz-	0.5%
	<b>Prevention Total</b>	<b>12.0%</b>
Access	insur-	3.2%
	cost	2.3%
	cover	0.9%
	medicare	0.9%
	avail-	0.9%
	afford	0.9%
	universal	0.5%
	bill	0.5%
	pay	0.5%
	money	0.5%
	<b>Access Total</b>	<b>11.1%</b>
Environment	air	0.5%
	<b>Environment Total</b>	<b>0.5%</b>
Gender	women	0.5%
	<b>Gender Total</b>	<b>0.5%</b>