



Radio Drives Search Executive Summary

September, 2017



Introduction

In today's digital world, consumers' path to purchase almost always includes using a search engine. In fact, according to recent Forrester Research data, 71% of consumers begin their journeys by using a search engine to discover new products and services (initiation), and 74% report using a search engine for consideration and purchasing (research, comparison, transaction). One of the most common questions posed to the Radio Advertising Bureau (RAB) by its members and advertisers is: Does radio advertising drive online behavior? Does radio advertising drive search? RAB commissioned the Radio Drives Search study because it was important to not only qualify, but quantify radio's ability to drive online behavior - namely search.

Background

It is a known fact that radio is the number one reach medium, reaching more people every week than any other medium. It reaches them in car, at work and on the go. There have been numerous studies that prove radio's ability to deliver robust return on investment for advertisers. While not all advertisers and brands measure campaign success based on web search, many do. In fact, digital and some traditional advertising are tagged to track a consumer's path from paid media to action. It was important to understand radio's impact on the search journey and not just qualify but quantify it.

The RAB commissioned this study through Sequent Partners, who worked with partnering organizations including Media Monitors and In4mation Insights to determine the study constructs as well as compile the data and determine the methodology that would be used to understand the baseline and measure the lift.

Study Highlights

Based upon an analysis of over 2,100 local radio ads across 6 different categories:

- Radio generated an average 29% lift in Google search activity.
- Search as a result of radio advertising is greater on weekdays versus weekends
- Radio driven search is higher during midday hours.
- Quality of radio creative has a direct impact on increased search behavior.

Methodology - How It Was Done

Understanding radio's role both alone and with other media is crucial. In layman's terms, it is capturing the impact of a media campaign. It is important to note first how this study was created.

Radio and TV occurrences (which also included time of day, date and estimated spend) were used to filter down the appropriate advertisers to use in the study. Advertiser categories used in the study were:

1. Automotive
2. Ecommerce
3. Insurance
4. Retail: Auto Aftermarket
5. Retail: Jewelry
6. Wireless Communications

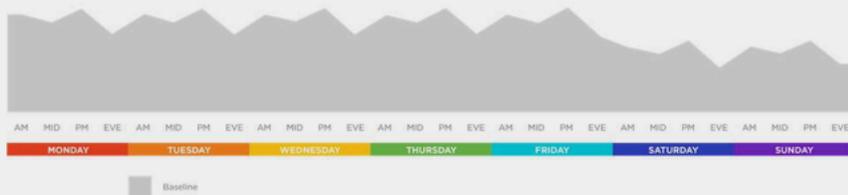
Google Search data, specifically Google Trends and Google Ad Words, provided the actual minute-by-minute search volume for given search terms (i.e., brand name, product names, etc.) which were matched to the radio occurrence data. It is important to note that all brands experience organic search without the aid of marketing. All lifts noted in this study are a lift from the organic search “baseline.” (Image A displays the natural peaks and valleys of search throughout the week and at specific times of day.)

The Impact Of Radio On Search Was Revealed Through A Model

Image A

Baseline Search

Typical number of searches by day and daypart



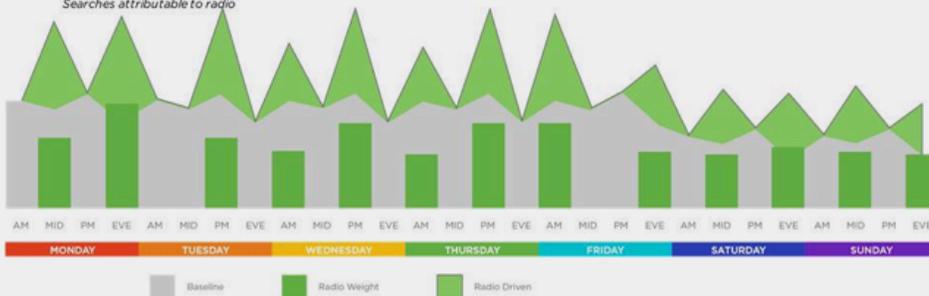
Using this baseline, radio activity is overlaid onto the graph (Image B green bars) illustrating where the radio weight aired. The green peaks highlight the incremental search attributable to radio (using the model which measures the impact of media).

The Impact Of Radio On Search Was Revealed Through A Model

Image B

Radio Driven Search

Searches attributable to radio

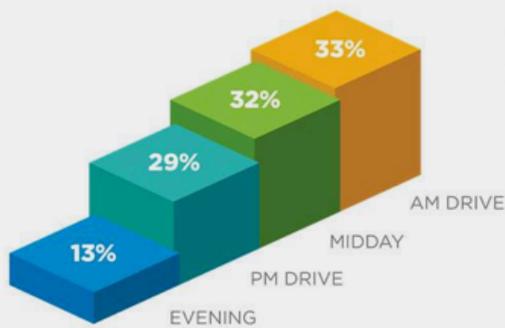


Study Findings

As noted in Image B, there are specific times when radio-driven search peaks. On average among the categories used in the study, radio-driven Google search is higher during the day than in the evening with the majority of search activity occurring in AM drive time. (Image C) Search activity was also nearly 4 times higher during weekdays versus weekends.

Search Activation Greater During The Daytime

Image C



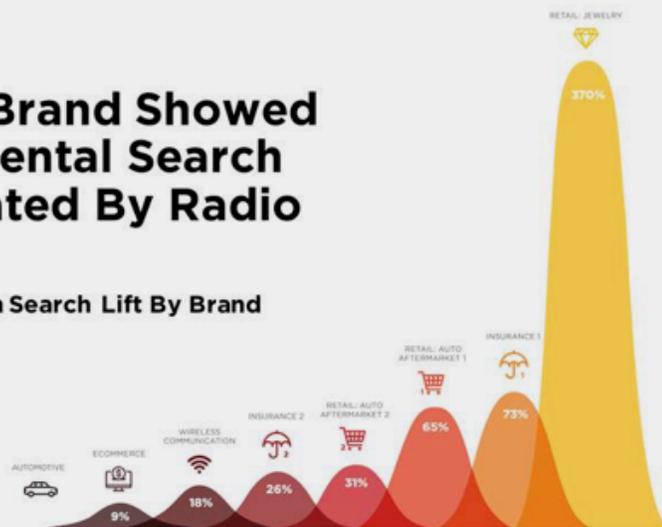
Radio Driven Search Lift By Daypart

Radio drove a 29% lift in Google search, on average, among the eight advertisers included within the study. When it came to individual brands within the study, every brand among the six categories showed incremental search lift generated by radio. (Image D)

Every Brand Showed Incremental Search Generated By Radio

Image D

Radio Driven Search Lift By Brand



In today's complex media landscape, advertisers often use more than one medium to deliver their ad messages. One particular brand included in the study used radio and TV in their campaign (a media-mixed campaign). The results were astounding. Radio drove 228% more search than TV in total and dollar for dollar! (See Image E) Radio improves search as both a stand-alone and as a complementary medium.

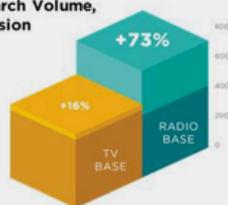
Insurance 1

Radio Drove 228% More Search Than Television In Total And Dollar For Dollar*

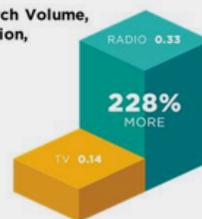
* Spending: Radio \$3MM, TV \$2MM

Image E

Incremental Search Volume, Radio vs. Television



Incremental Search Volume, Radio vs. Television, Dollar For Dollar



As clearly seen in Image D, lift in search varied by ad category. Consumers today are much more apt to search for information on particular ad categories versus another. Anecdotally, we know that auto buyer intenders will do their entire research online well before entering a dealership. But in those categories that experienced lift, the team was determined to find the common denominator among them all. It came down to creative.

Among each of the advertisers included within the study, there were certain critical and common attributes found within the creative execution (i.e., radio commercial) of each advertiser. Ads that contained a call to action to visit a website, humor or drama, or created a story did not increase the lift in search. The advertisers that experienced a greater lift in search had key characteristics. They were (Image F):

1. Price deals
2. Product or product feature news
3. Localization/Calling out specific locations
4. Non-Price offer
5. Personalization - explicit targets

Top Creative Factors Associated With Driving Search

Image F



Price Deals



Product or Feature News



Localization/ Calling Out Specific Locations



Non-Price Offer



Personalization Explicit Targets

Conclusions

Radio drives search. While the lift in search may vary by advertiser and category, advertising on radio can increase an advertiser's web search activity. The effectiveness of a radio commercial has always been attributed to a successful radio campaign. This study underscores the critical importance of developing good radio creative for a very important reason - to aid in an advertiser's web activity.

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ADVERTISING
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About the Radio Advertising Bureau

The Radio Advertising Bureau is the not-for-profit trade association representing America's broadcast radio industry. Its primary objective is to drive revenue growth through advocacy, providing the tools and resources to help the industry attract new sales talent to the medium and enhance industry professionalism through training and support. The RAB serves more than 6,000 member stations in the U.S. and more than 1,000 member networks, representative firms, broadcast vendors, and international organizations. Learn more at www.rab.com.



About Media Monitors

Media Monitors is the nation's leading broadcast monitoring and verification service for broadcasters, print media, media investment companies and advertising agencies. Media Monitors is a subsidiary of RCS, the world's largest provider of broadcast and webcast software. For more information, visit www.mediamonitors.com.



About Sequent Partners

The Sequent Partners are highly respected research industry leaders and entrepreneurs, who have held leadership positions at J. Walter Thompson, General Foods, Leo Burnett, FCB and Y&R, BASES, and recently, RealityMine. They are past Chairman and President of the Advertising Research Foundation. They bring to this project deep expertise in advertising and media research, digital technology, measurement and econometrics.

Since 2003, Sequent Partners has driven innovation through proprietary, best-practice consulting for top advertisers and media companies. The firm conducted nine highly-visible industry ROI metrics and analytics initiatives, re-engineered network business frameworks through audience identification and segmentation, developed analytic approaches for single source big data, created technical requirements and techniques for data fusions, designed a cross-platform advertising measurement system, advised major advertisers on how to navigate changing media/data landscape, and developed USA TouchPoints, the only syndicated study of consumer's daily lives and media consumption. Sequent Partners is respected for its objective, external expert perspective based on our broad experience across leading companies, cultures and disciplines ... and our industry-wide network.



About In4mation Insights

In4mation insights specializes in the design of analytic organizations, delivers sophisticated analytics solutions, and provides resources to help companies make better use of all their data and analytic assets. As experts in the application of sophisticated, state-of-the-art marketing science models to answering modern business questions, our technical expertise and award-winning thought leadership is combined with practical, decision-focused solutions to help firms make better decisions and grow their top and bottom lines.