



The Los Angeles Lifestyles Study

Where Can You Find Your Customer in 2002?
2001



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Focus of the Study

- Have lifestyles changed in the past few years?
- What new lifestyle patterns have emerged?
- How has that affected people's media accessibility?
- What are the new realities for developing communications strategies?

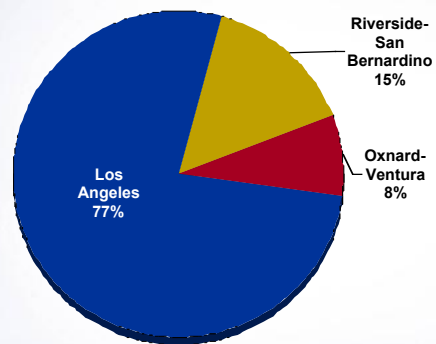
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Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.

Background

- 1,000 telephone interviews (August 2001) with Winter 2001 and Spring 2001 Arbitron diarykeepers (43.6% response rate)
- Study conducted by Arbitron
- Random sample of diarykeepers 18+ in Los Angeles, Riverside-San Bernardino, Oxnard-Ventura markets
- Comparison data from 1999 study

Interviews by Market



N=1,000

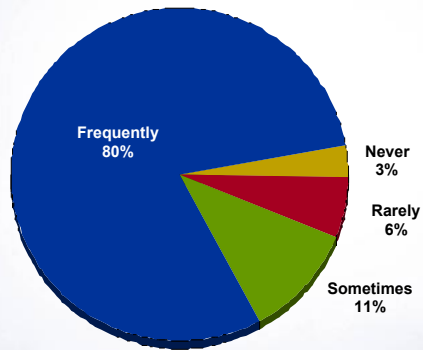
What Are People Doing in Their Car or Truck?



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“How often do you listen to the radio while riding in a car or truck?”



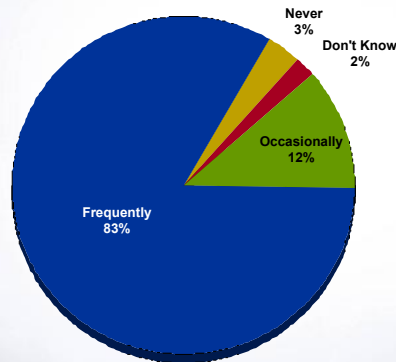
2001

N=1,000

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Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.

“How often do you listen to the radio while riding in a car or truck?”

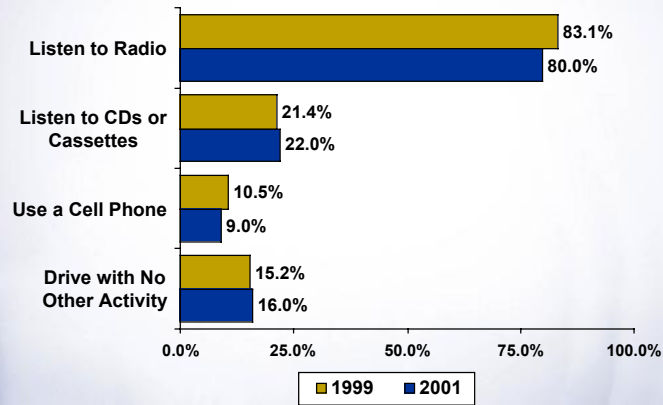


1999

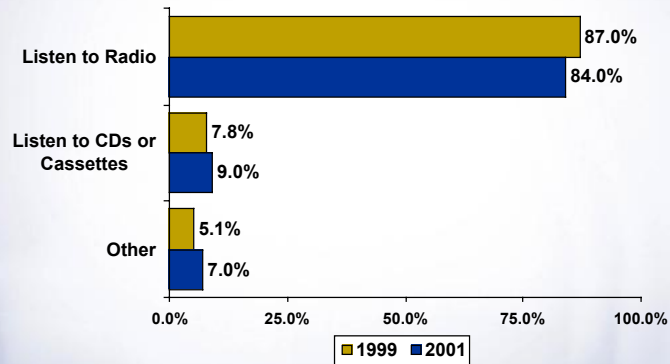
“Frequent” Listeners

- 90% of those with a household income of at least \$50,000 listen to the radio “frequently” while in a car or truck
- 90% of people who work in their car listen “frequently”
- 89% of people who have driven at least 250 miles in the past week listen “frequently”

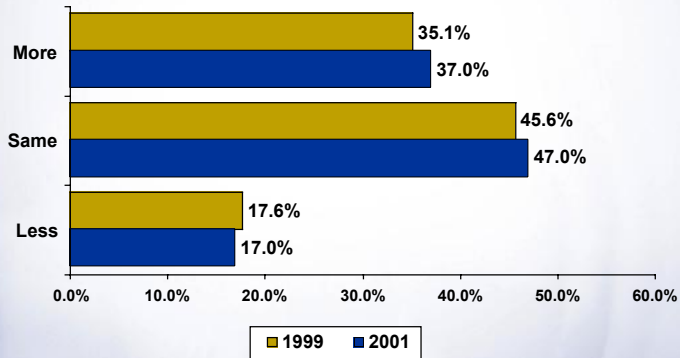
In-Car Activities Done Frequently



“What activity do you do the most while riding in a car or truck?”



“Are you listening to the radio in your car more or less than one year ago?”



Those Listening More Often in Their Car

- 55% of Males 18-34 are listening more often
- 53% of Females 18-34 are listening more often
- 53% of Hispanics are listening more often
- 47% of blacks are listening more often
- 48% of Asians are listening more often

Why Are People Spending More Time with Radio in Their Car?

Driving More/Traffic

- Life is busy now and I'm in the car more often.
- I have to drive a little farther and I listen to the radio more.
- Because of traffic and I listen to the traffic reports.
- Because I have more stress.

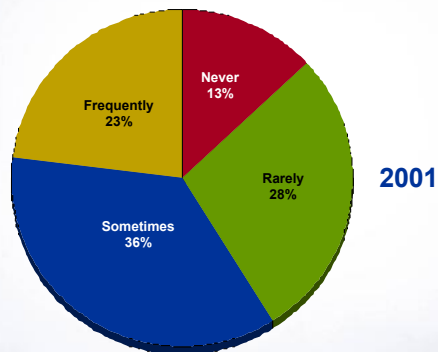
Personalities/Music

- I like the stations that are out there better.
- I am driving a lot more in the morning. My favorite personalities are in the morning.

Divine Intervention

- Because I have rededicated my life to God.
- Because my CD changer broke.

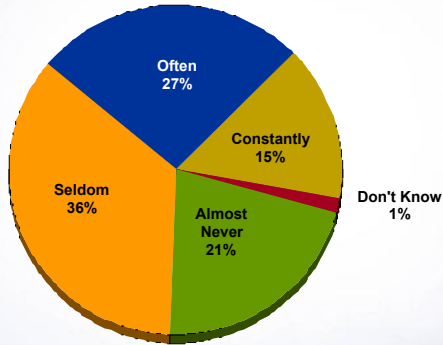
“How frequently do you change channels in the car?”



N=992

35% of M18-34 change “frequently”
37% of F18-34 change “frequently”

“How frequently do you change channels in the car?”

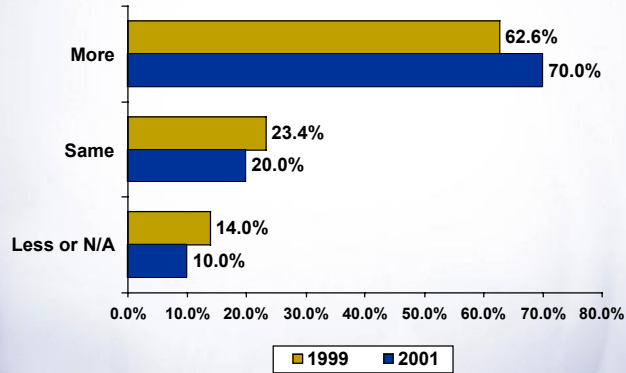


1999

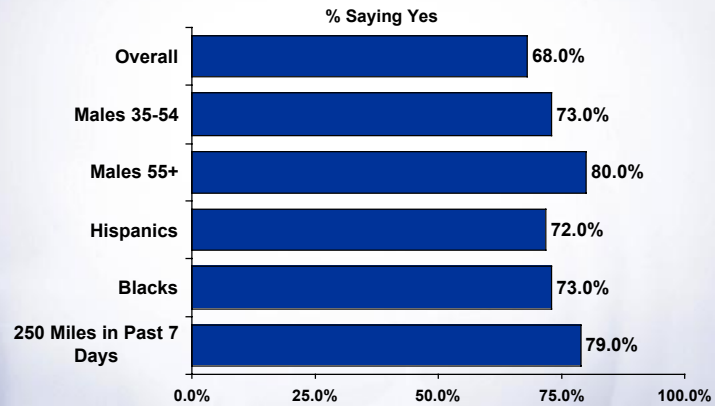
M18-24 = 32% “Constantly”

Traffic in 2001

“Are you encountering more or less traffic than you were one year ago?”

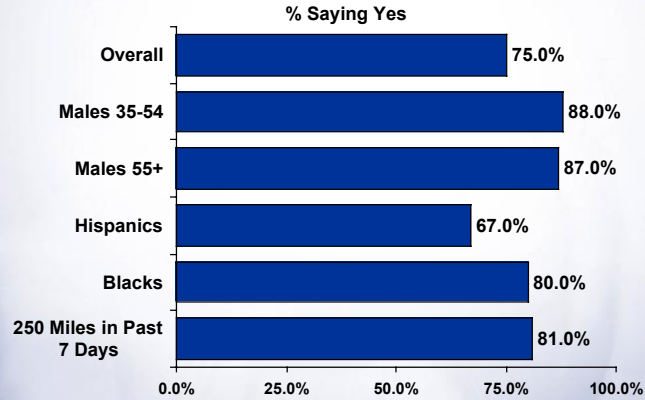


“Do you pay attention to traffic reports you hear on the radio?”



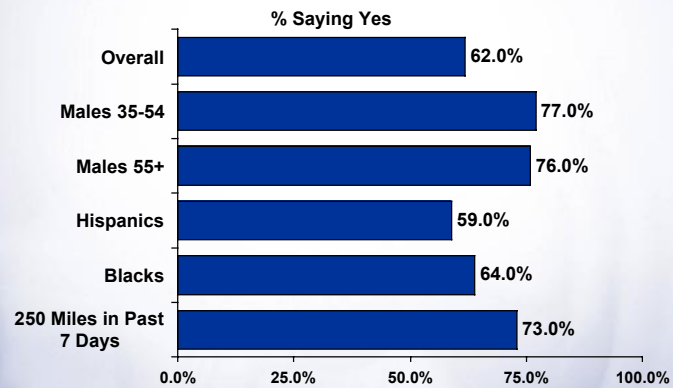
“Have you ever changed your route based on a traffic report?”

Base: Those who pay attention to traffic reports



“Have you ever changed your route based on a traffic report?”

Base: Everyone



Cell Phone Usage



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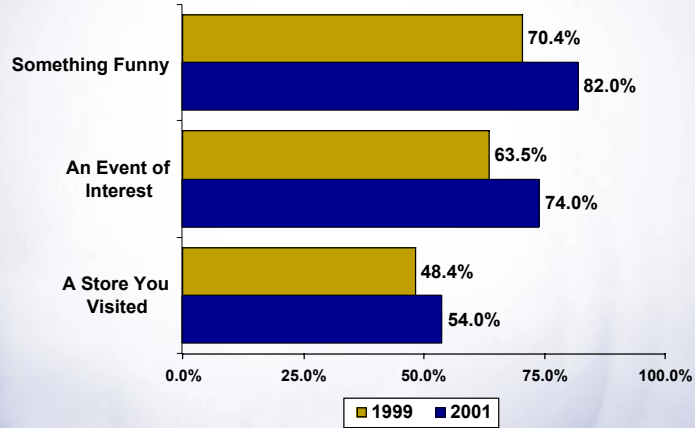
People Who Use Cell Phones “Frequently” or “Sometimes” While Riding in a Car or Truck

- 30% of people overall
- 38% of people 18-34
- 43% of blacks
- 48% of people with a household income of \$75K+
- 14% of cell phone users have called about an ad they heard on the radio
- 28% of cell phone users have called a radio station from their car

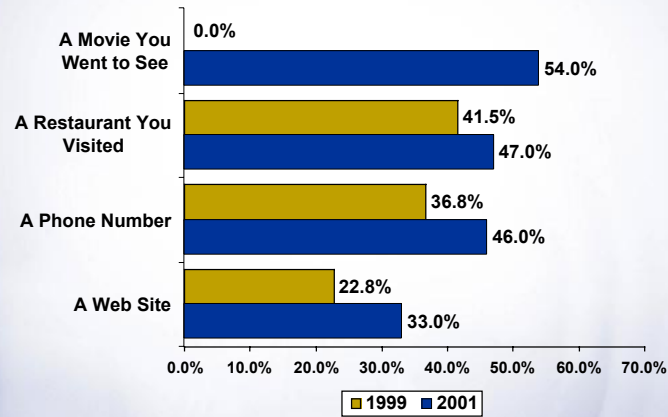
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Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.

Things People Hear When Listening to the Radio



Things People Hear When Listening to the Radio (continued)



At-Work Behavior

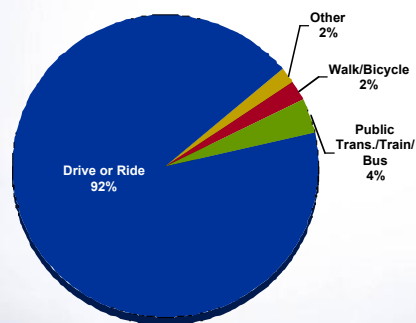


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“How do you get to your primary job?”

Base: Employed full or part time



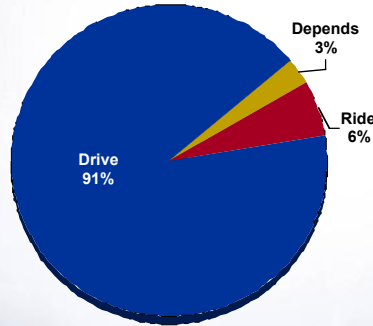
N=558

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Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.

“When traveling to work, do you drive or ride as a passenger?”

Base: People who drive or ride to work

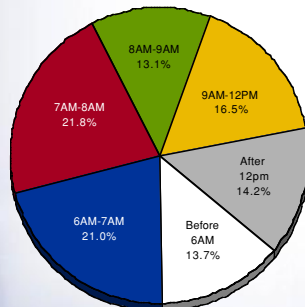


N=515

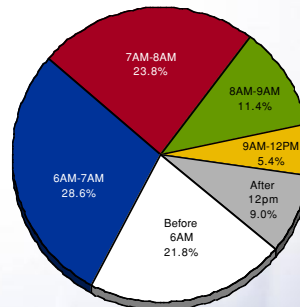
“What time do you leave home to go to work?”

We leave home earlier than ever before.

Base: Took a trip that day



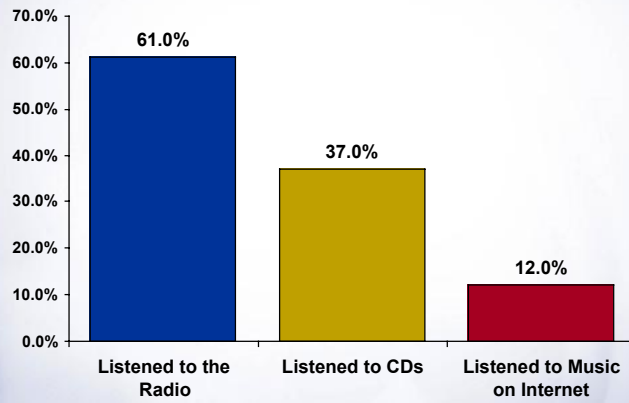
**Adults 18+
1999**



**Adults 18+
2001**

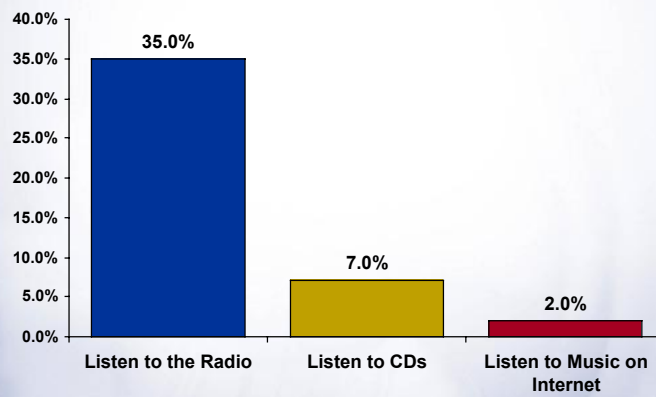
“While working, have you ever...?”

Base: People who work full or part time

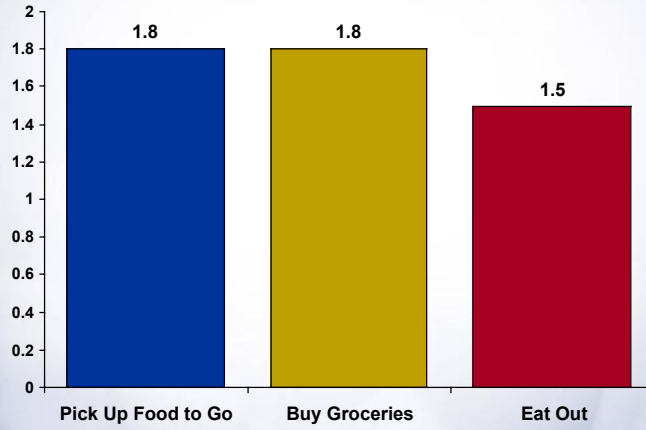


“Which activities do you do every day at work?”

Base: People who work full or part time



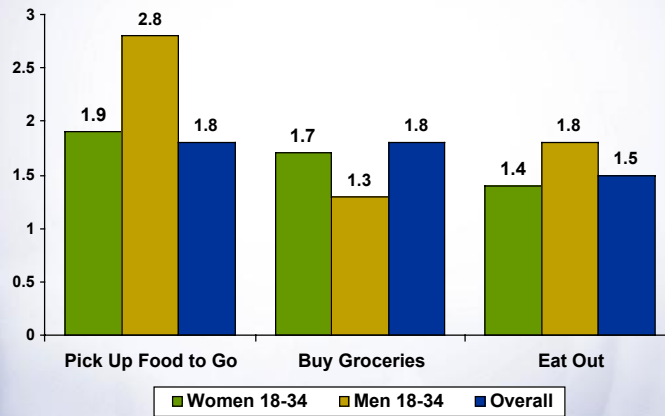
Average Number of Stops During Workweek



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Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.

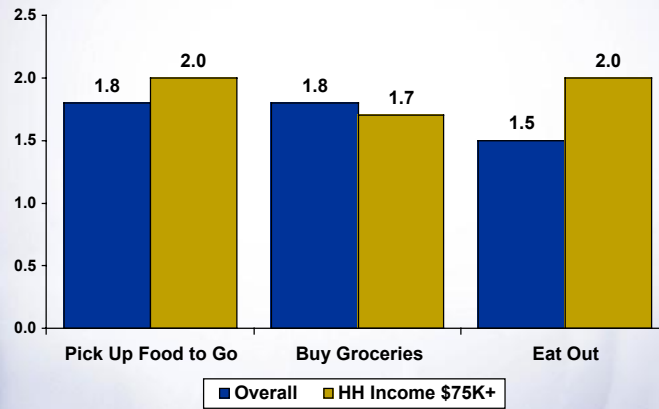
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© 2002 Arbitron Inc.

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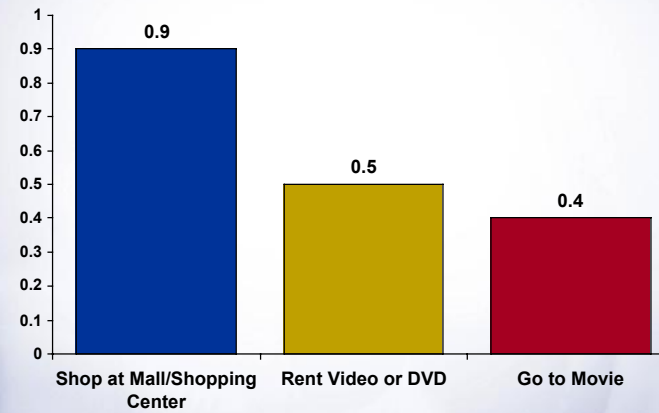
Average Number of Stops During Workweek



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Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.

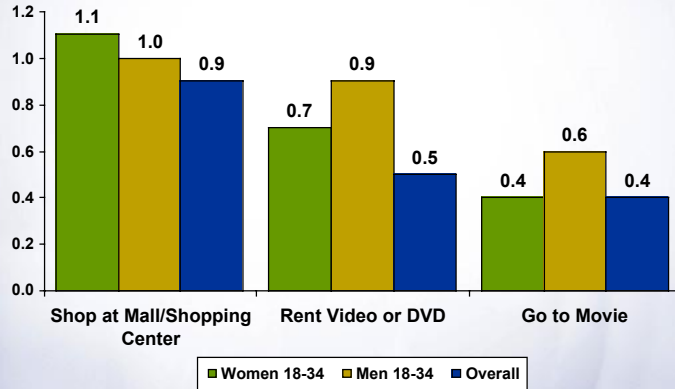
Average Number of Stops During Workweek



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Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.

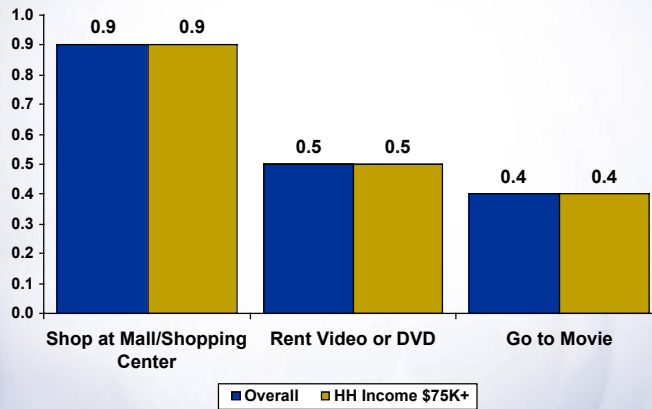
Average Number of Stops During Workweek



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Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.

Average Number of Stops During Workweek



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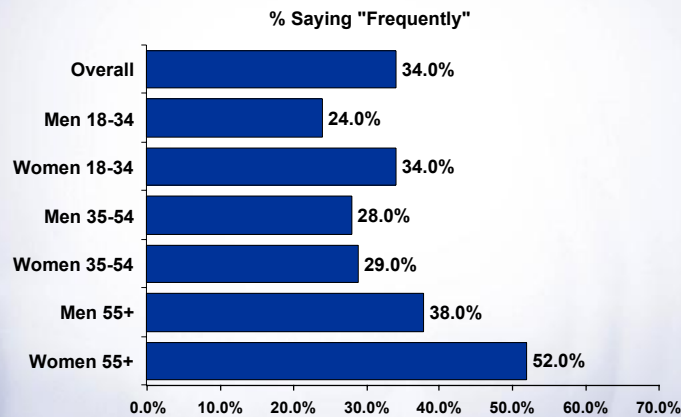
Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.

When Are People Stopping?

Base: People who work full or part time

Stop	% on Way Home	% Later
Buy Groceries	50%	43%
Pick Up Food to Go	39%	29%
Eat Out	16%	70%
Rent a Video or DVD	28%	69%
Go to a Movie	13%	85%
Stop at a Mall/Shopping Center	21%	67%

“How often do you listen to radio at home?”



Radio vs. Other Media



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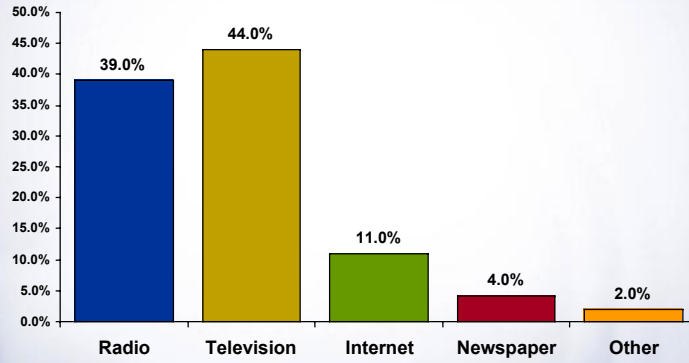
Morning Exposure

- Between 5AM and 9AM, 74% of radio listeners have had their first exposure to radio
- During that same time, only 29% of television viewers have had their first exposure to television

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Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.

Most Time with on Average Weekday



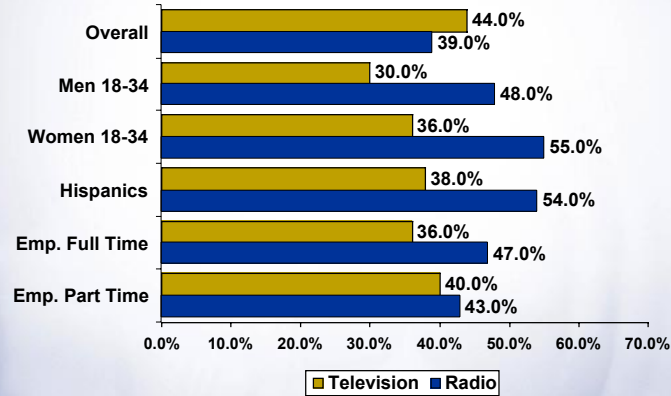
N=980

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Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.

Radio vs. Television – Weekday

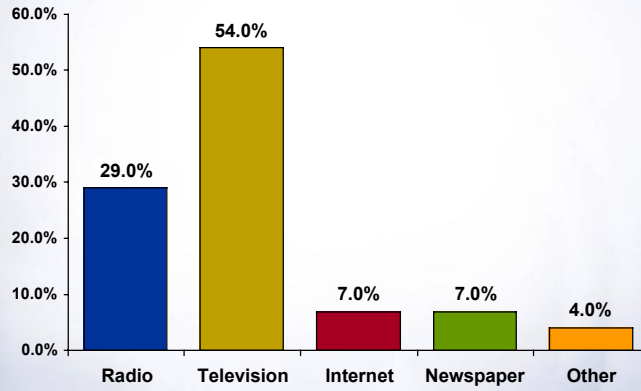
“Which medium do you spend the most time with on an average weekday?”



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Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.

Most Time with on Average Weekend

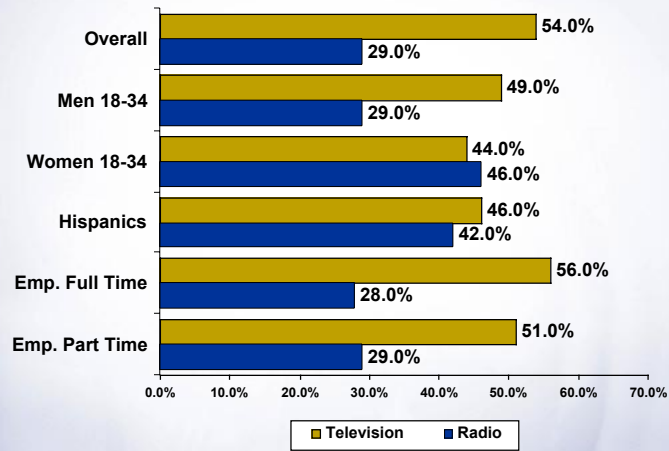


N=975

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Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.

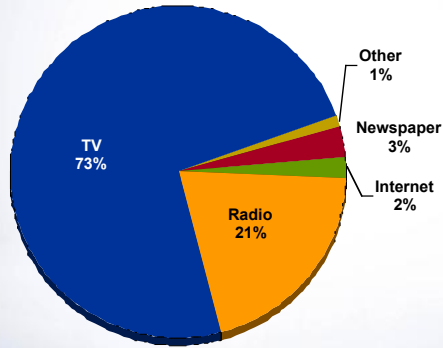
Radio vs. Television – Weekend



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Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.

“Where do you go first for local breaking news?”

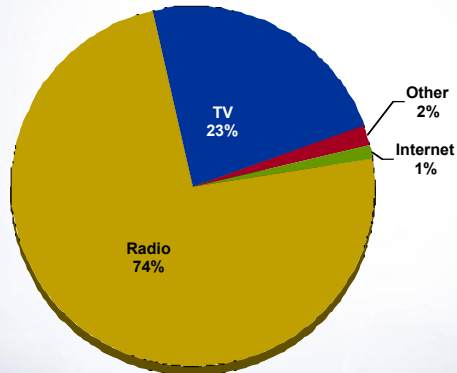


N=975

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Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.

“Where do you go first for traffic reports?”



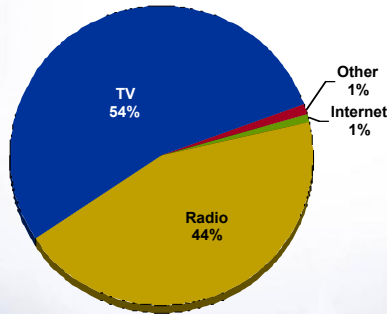
N=903

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Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.

“Where do you go first for Southern California natural disaster reports?”

59% of M55+ would go to radio



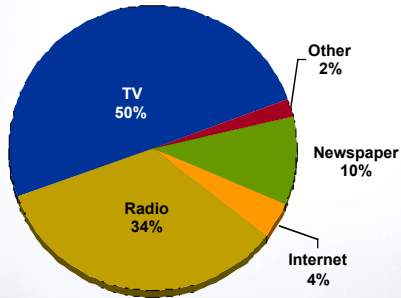
N=973

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Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.

“What source do you trust the most for information you need?”

Radio is the most trusted source among M55+ (44%) and F55+ (45%).

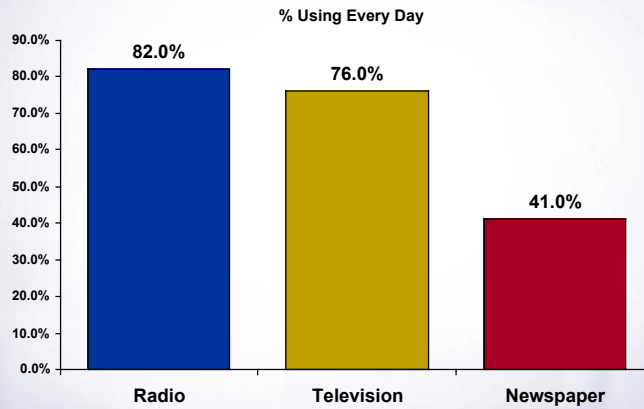


N=914

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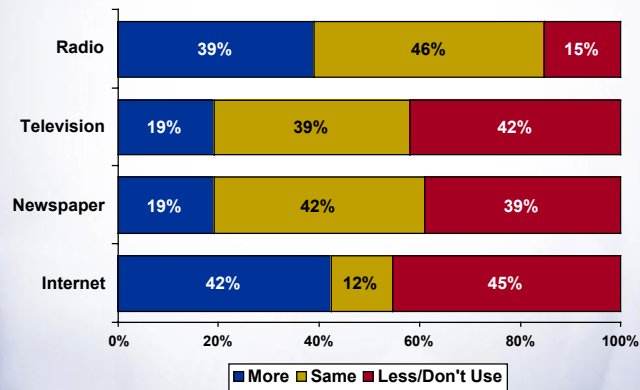
Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.

Everyday Media Usage



Our Lifestyle Changes Are Reflected in Our Media Usage

More or Less Time with Media Than One Year Ago



Radio Overall

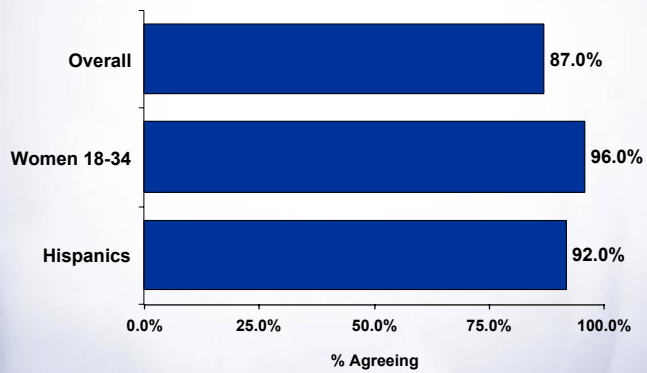


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“Having the radio on makes the ride seem shorter”

Item asked on 1-7 scale where 5-7 = “Agreement”

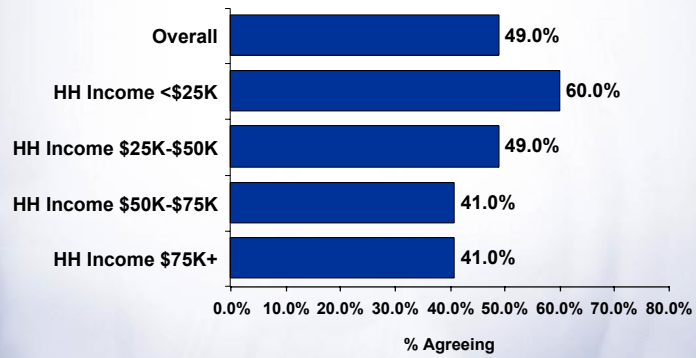


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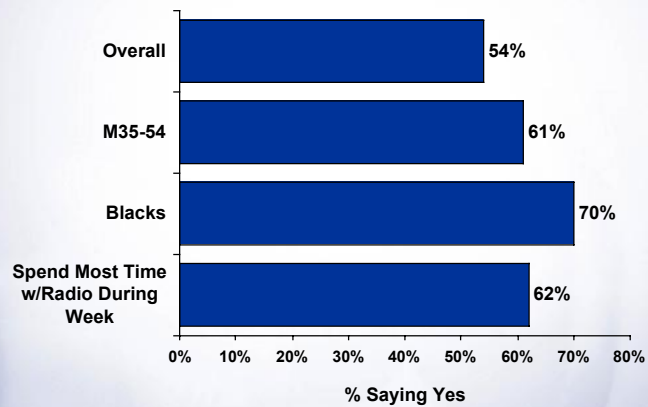
Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.

“Commercials are a useful source of info about products and services in my area”

Item asked on 1-7 scale where 5-7 = “Agreement”

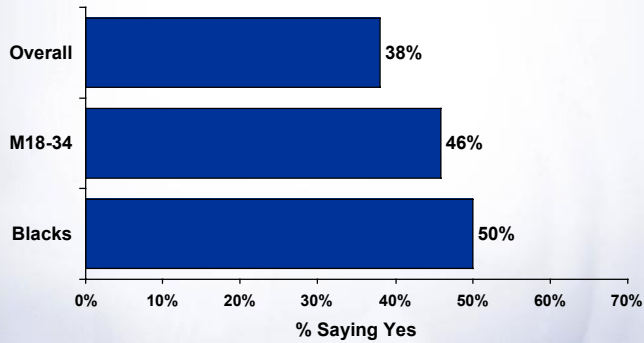


“Do you have a favorite radio personality?”

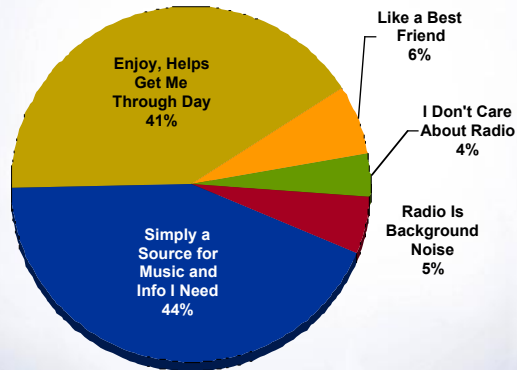


“Have you purchased a product based on an endorsement by a favorite personality?”

Base: People with a favorite radio personality

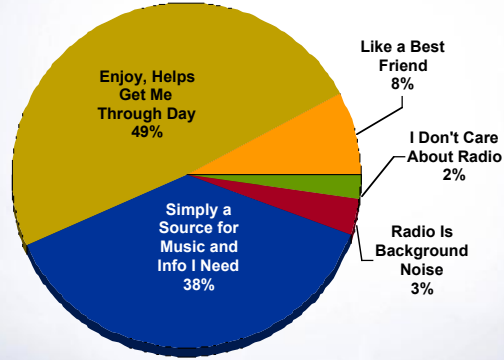


“Which statement is closest to how you feel about radio in general?”

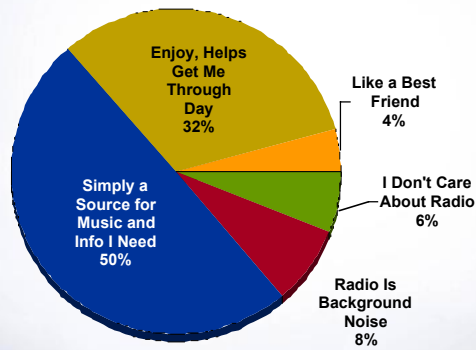


N=990

Those WITH a Favorite Radio Personality...



Those WITHOUT a Favorite Radio Personality...



“What do you like most about radio today?”

Music, Information, and...

- Immediacy and price; it's free and instantaneous.
- They just sort of nail it. I like the honesty of it.
- It keeps you company when you're alone in the car, and it gives you information that is useful to you. And they give you emergency information faster than anyone else.
- I like everything. Sometimes I'm sad and the DJs say something funny and make me laugh and make me feel better.
- That I don't have to be in one place to listen to it—whether it is walking, working, or at home.

“What do you like least about radio today?”

Commercials

- Commercials are louder than anything else.
- Commercials, advertisements. The volume of them. You're always reaching to turn the volume down.
- The same ones over and over.

Content

- The freedom that people have to say disgusting things.
- The crudeness, bad language, bathroom humor.

Sound

- Too many sound bites. Everything seems to be abbreviated.
- Seems like it's kind of loud and fast talking, not conversational. It kind of blears at you.

Results by Format



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Adult Contemporary P1s

- 34% change channels frequently in the car (23% overall)
- 41% of working Adult Contemporary P1s listen to the radio every day at work (35% overall)

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Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.

Alternative P1s

- 46% spend the most time with radio on an average weekday (39% overall)
- 83% listen to the radio “frequently” in the car (80% overall)
- 42% have driven 250 miles or more in last 7 days
- 30% change stations “frequently” in the car (23% overall)
- More heavy users of CDs/cassettes (38% use frequently) and cell phones (18% use frequently) while in the car
- 88% learned of an event of interest through radio
- 73% learned of a movie they later went to see

AOR/Rock P1s

- 87% learned of an event of interest through radio
- 44% have noted a Web address heard on radio
- 88% listen to the radio “frequently” in the car (80% overall)
- 41% have driven 250 miles or more in last 7 days
- 33% change stations “frequently” in the car (23% overall)
- 8% are very interested in satellite radio (6% overall)
- 14% use cell phones “frequently” in the car (9% overall)

Urban P1s

- 49% are spending more time with radio in the car than one year ago (37% overall)
- 43% spend the most time with radio on average weekend (29% overall)
- 73% have a favorite radio personality (54% overall)
- 50% of those with a favorite radio personality have purchased something based on a personality endorsement (38% overall)
- 75% learned of a store they visited through radio
- 86% listen to the radio “frequently” in the car (80% overall)

CHR P1s

- 48% spend the most time with radio on average weekday (39% overall)
- 69% have a favorite radio personality (54% overall)
- 89% listen to radio “frequently” in the car (80% overall)
- 39% change the station frequently while in a car (23% overall)
- 77% learned of a movie they went to see through radio
- 69% have listened to the radio at work; 24% have listened to music on the Internet at work
- More heavy users of CDs/cassettes (37% use frequently) and cell phones (16% use frequently) while in the car



Country P1s

- 83% listen to radio “frequently” in the car (80% overall)
- Only 15% change stations “frequently” while listening in the car (23% overall)

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Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.



Jazz P1s

- 91% listen to radio “frequently” in the car (80% overall)
- 85% have learned of an event of interest through radio (74% overall)
- 57% have noted a phone number they heard on the radio (46% overall)

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Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.



News/Talk P1s

- 46% trust radio the most to provide them with the information they need (34% overall)
- 54% would go to radio first in the event of a natural disaster in Southern California (44% overall)
- 80% pay attention to traffic reports on radio (68% overall)
- 41% “frequently” listen to radio at home (34% overall)

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Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.



Oldies P1s

- 86% listen to radio “frequently” while in a car (80% overall)
- 85% of those paying attention to traffic reports have changed their route based on a report (75% overall)
- 68% have listened to the radio at work (61% overall)

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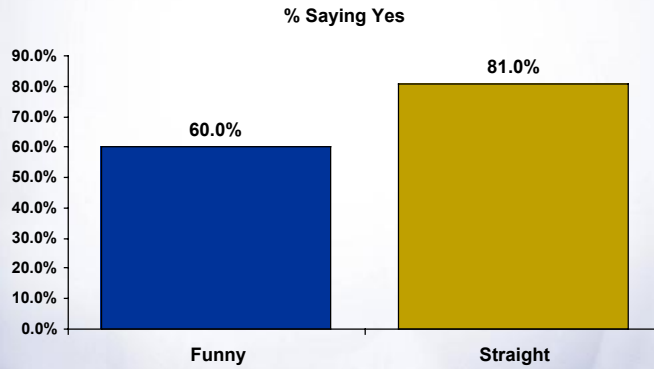
Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.

Spanish P1s

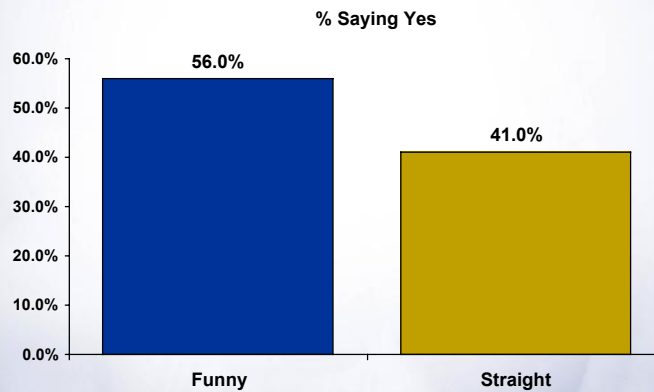
- 60% spend the most time with radio on an average weekday (39% overall)
- 67% are spending more time with radio in general when compared to one year ago (39% overall)
- 61% are listening to the radio in a car more than they were one year ago (37% overall)
- 67% have learned of a movie they later went to see (54% overall)
- 64% have noted a phone number heard on the radio (46% overall)
- 52% listen to radio at home “frequently” (34% overall)

Funny vs. Straight Commercials

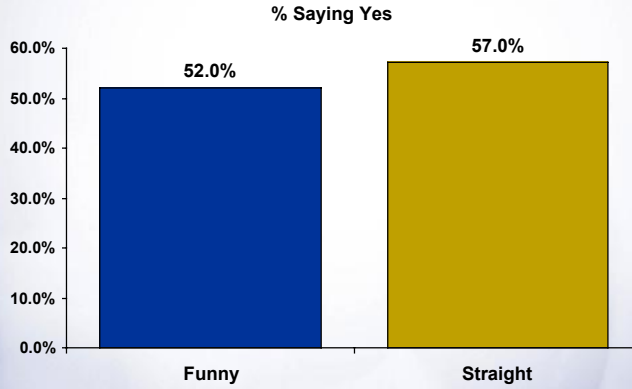
“Does this commercial sound similar to others you hear on the radio?”



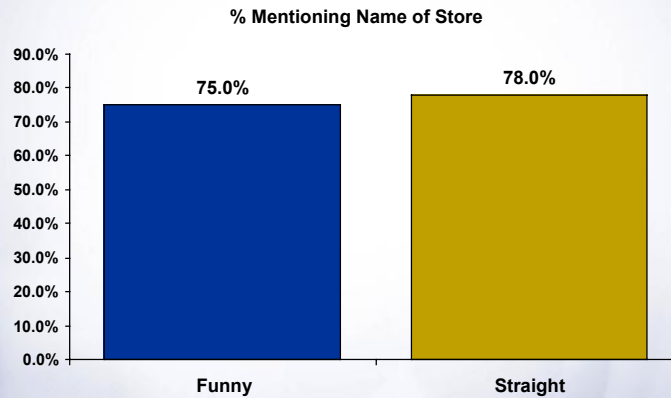
“Is this type of commercial more likely to catch your attention than other radio commercials?”



“If heard on the radio, would you have listened?”



“Do you remember the name of the store from this commercial?”



Summary

- Radio has a higher reported daily cume than either TV or newspaper
- Even with the presence of the Internet, radio usage continues to grow
- Radio is best for traffic reports; TV is preferred for breaking news and disasters (though TV is not always available during the workday)
- More than half have a favorite radio personality
 - » 38% have bought something based on that personality's recommendation

Summary *(continued)*

- The vast majority of Los Angeles residents continue to drive to work alone
- That same vast majority continues to listen to radio in the car over any other activity
- Listening in the car continues to increase
- While there is some channel surfing, it is limited
- It may be obvious, but the perception of L.A. traffic is that it continues to get worse (even over 1999)
- Over two-thirds of the sample paid attention to traffic reports; over 60% have changed their route due to a traffic report

Summary *(continued)*

- Listeners had higher “noting” scores of radio elements than in 1999
- 35% of the sample listen to radio at work each day
- The sample makes a lot of pit stops
 - » Groceries and food to go are on the way home
 - » Entertainment stops come after they get home
- Radio is barely behind TV for most time spent on weekdays
 - » TV stronger on weekends
 - » A18-34 and Hispanics spend more time with radio on weekdays
 - » Employed spend more time with radio than TV on weekdays

Summary *(continued)*

- The Radio Ranch (funny) spots scored higher than straight spots in getting attention
- About equal with straight in terms of remembering the store name and desire to listen to the spot



“Why do you listen to radio in a car MORE than you were one year ago?”

- “I love my station.”
- “I’m driving farther to my job and stuck in traffic more.”
- “I’m in my car more than I was before.”
- “I’m in traffic longer.”

— Participants

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Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.



“What do you like the most about radio today?”

- “Whenever I turn it on, I always find something I like on it.”
- “That you can communicate with them.”

— Participants

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Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.

“What do you like the most about radio today?” *(continued)*

- “The radio personalities.”
- “Morning shows, talk shows, traffic reports, ads about new things.”
- “The different personalities.”
- “The way they talk, their voices; they’re alive. You feel like you can see how they talk.”

— Participants

“What do you like the most about radio today?” *(continued)*

- “I suppose the fact that you can take it with you. Wherever you are, it is.”
- “It’s local. They are local people and they talk about local things.”
- “I like everything. Sometimes you’re sad and the DJs say something funny and make me laugh and make me feel better.”

— Participants



“What do you like the most about radio today?” *(continued)*

- “Well, I have always loved radio. It gives me what I need...it keeps my mind happy.”

— Two Different Participants

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Source: Arbitron/SCBA Los Angeles DMA® Lifestyle Study, August 2001, Adults 18+.



For More Information...

The data from this study can be reported for different market segments (e.g., A25-54 or M18-49 or \$75,000+ HH Income).

For more information or to request a customized version of the data, please contact:

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