



Radio's Role During a National Crisis

Through analysis of radio's role during attacks on America, this study is designed to help radio stations maintain and increase listening during a national crisis.



Foreword

Immediately following the terrorist attacks of September 11, American radio stations improvised brilliantly. Some worked with sister stations that have all-news formats and carried their news. Others played patriotic music that had very little in common with their normal music formats. And many other stations moved to talk formats so their listeners could express how they were feeling.

Many of you called Arbitron to ask how your temporary format changes would affect your station's numbers, but as Arbitron began to examine these matters, we quickly realized that the real question we ought all be asking was this: **What was radio's role during this national crisis and what can we learn from what happened so we are better prepared in the unfortunate event that we are faced with a similar situation?**

Arbitron is uniquely positioned to help the industry determine radio's role in a national crisis, given the reams of data we have, as well as Arbitron's access to so many consultants and group programmers. Thus, we decided it would be in the best interests of the industry if Arbitron conducted a formal study on the subject.

Radio's Role During a National Crisis is not meant to provide a historical view. Rather, it is our hope that by examining what happened around the September 11th tragedy, programmers will have unprecedented insight into what they should be considering if they are pressed into similar service again.

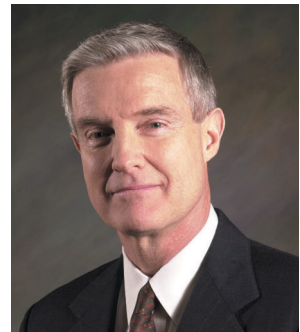
Work on this study began in October 2001. As information from our diarykeeper reinterviews began coming in, we realized we had radio ad sales information which offered a lot of promise to stations that were scrambling to salvage their fourth-quarter revenue figures. Therefore, in November 2001, we released a preliminary sales extract of the study to help stations meet their financial goals.

Also in November, we assembled an august group of programming consultants in Columbia and finished the programming portion of the study. The results from this session were released to programmers in December.

Now, bundled in this single book, Arbitron presents the Sales Study, the Programming Study and the addition of the Fall 2001 ratings information.

As is evident throughout *Radio's Role During a National Crisis*, radio got an A+ from listeners for the way it handled the 2001 crisis. Thank you to everyone who contributed to this study. We hope it is a meaningful reference guide for the entire radio industry.

Radio's Shining Hour



Steve Morris
President &
Chief Executive Officer

Up and down the dial, radio stations across the country dropped commercials and music for news and talk minutes after the first jet crashed into the World Trade Center on September 11. On that date and in the weeks that followed, radio reinforced its role as a community builder or, as one station's operations manager put it, "the coffeeshop of the global village."

Everywhere, listeners depended on their radio stations for the opportunity to voice their feelings and hear their neighbors, and in doing so, radio helped bring the nation together and begin the healing process.

Radio rose to the occasion, and all of us at Arbitron have never been prouder to serve the industry. In appreciation, Arbitron has conducted this study, *Radio's Role During a National Crisis*, to help everyone connected with the industry understand what listeners thought about radio's response to the September 11 attacks. By evaluating the specific role of radio during the crisis, stations can be better prepared if and when we face another national crisis in the future. That's not something we want to think about, but unfortunately, we must.

Sincerely,

A handwritten signature in blue ink that reads "Steve Morris". The signature is fluid and cursive, with the first letters of "Steve" and "Morris" being capitalized and prominent.

Steve Morris
President & Chief Executive Officer
Arbitron Inc.



Owen Charlebois
President, U.S. Media Services

The New Normal

September 11 and its aftermath have plunged each of us into self-definition and reflection as we strive to comprehend and adapt to what Vice President Dick Cheney has called “the new normal.”

Radio, too, has a new normal. In the aftermath of the tragedy, radio seems to have rediscovered that its strength is serving as a connection between listeners. It has a bond with audiences that no other medium can claim. As one listener put it in an e-mail to his station, “If it’s got to be bad news, I’d rather have my friends deliver it.”

It is incumbent upon each station to prepare itself for this changed world we live in. We urge you to at least informally discuss how you could be better prepared if you are called upon again to help listeners understand and deal with a future crisis.

What’s your plan for the new normal?

Sincerely,

A handwritten signature in purple ink, appearing to read "Owen Charlebois".

Owen Charlebois
President, U.S. Media Services
Arbitron Inc.

To Listeners, Post-9/11 Commercials Signaled a Welcome Return to Normalcy

While special radio programming became a lifeline for the American public on September 11 and in the first days that followed, listeners have told us that radio's subsequent return to normal programming—including commercials—was a welcome occurrence because it made them feel that life was finally returning to normal, too. Interestingly, more than 60 percent of respondents who were surveyed for the *Radio's Role During a National Crisis* study indicated advertisers should have returned to running commercials just one or two days after September 11.

We've long known that radio provides a unique and essential service to our communities. We now have information which suggests commercials are an integral part of American life as well. Should the radio industry ever be thrown into another national crisis, it's worth noting that many listeners consider radio ads to be a welcome sign of normalcy.

With best regards,



Scott Musgrave
Senior Vice President & General Manager, Arbitron Radio
Arbitron Inc.



Scott Musgrave
Senior Vice President &
General Manager
Arbitron Radio



To: Radio Industry Executives, Program Directors and Sales Managers
Fr: Gary Fries, President/CEO, the Radio Advertising Bureau



The September 11 terrorist attacks on New York and Washington, DC, struck our nation at its core and for a brief moment brought life as we know it to a standstill for many Americans, regardless of race, religion, gender or ethnicity. I have stated publicly and privately my belief that the radio industry as a whole rose to a huge challenge, and that the days and weeks following the tragedy proved to be radio's finest hour.

Like many citizens, I personally heard the initial reports that Tuesday morning on radio—in my case, New York radio stations—before access to TV coverage was available. Later in the week, I listened to coverage of national services by large and small market stations as I drove across rural Pennsylvania and through Ohio. Radio not only provided the necessary facts and information for people to function during the immediate crisis, but also acted as the medium that stitched the nation back together in the ensuing days and weeks following the attacks. Our listeners felt an unprecedented need to reach out, and radio was there.

In November, Arbitron fielded a study to document listeners' responses to radio's efforts during and immediately after the crisis, and to gauge their sentiments regarding what is and is not an appropriate role for radio to play during a national crisis. The results of *Radio's Role During a National Crisis* offers insights into immediate and potentially more-long-term effects on the medium's (and your station's) relationship and credibility with our listeners. The information contained in the study has value to both programming and sales.

Radio's Role During a National Crisis is meant not only as a retrospect on radio post-9/11, but also as a guidepost in the event our nation, and our industry, is faced with a similar challenge in the future. My most fervent wish, and that of Arbitron's, is that you never need use it for that purpose.

Sincerely,

A handwritten signature in blue ink that reads "Gary Fries". The signature is written in a cursive style. Below the signature, the name "Gary Fries" is printed in a small, black, sans-serif font.

RADIO ADVERTISING BUREAU, INC. • HEADQUARTERS
261 MADISON AVENUE, 23RD FLOOR, NEW YORK, NY 10016
PHONE: (212) 681-7200 • **FAX:** (212) 681-7223 • **INTERNET:** <http://www.rab.com>
NEW YORK, CHICAGO, DALLAS, DETROIT, LOS ANGELES

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The Study

Designed to:

- Help stations maintain and increase listening during a national crisis
- Generate information useful in selling ad time during a crisis
- Identify radio's strengths in serving and supporting the community

Designed for:

- Radio station owners, managers, program directors and sales managers
- We believe it will also be of great interest to media buyers and encourage their increased use of radio during times of crisis

Study Details

- Random sample of Summer 2001 Phase 3, Week 3 (Sept. 6-12) and Week 4 (Sept. 13-19) Arbitron diarykeepers age 12+
- 1,500 telephone interviews were completed from Oct. 19 to Nov. 5 - interview was approximately 10 minutes long

Topics included media usage on Sept. 11, perceptions of radio's response to attacks, lifestyle changes since Sept. 11
- Analysis of Summer 2001 survey data and Fall 2001 survey data
- Consultant Fly-In Brainstorming Session to determine which data were relevant to radio stations.
- One-on-one *probing* conversations with 30 diarykeepers from the Summer 2001 survey.

Executive Summary

Prompted by the terrorist attacks on America on September 11, 2001, Arbitron undertook a national study to help the radio broadcast industry clarify the nature of radio's role during a state of crisis.

The study is designed to help group owners, managers and program directors keep their stations relevant to listeners during times of crisis and support the communities they serve. The study is also intended to help advertisers and agencies understand the value of radio during such troubled times.

The study shows that listeners believe radio did a remarkable job during the crisis, and that radio was especially valuable in helping them recover from the national tragedy and get back to normal. Topline findings are summarized below.

Radio's Role During a National Crisis is based on reinterviews with 1,500 people in continuous markets who were surveyed during the last two weeks of the 2001 Summer Book (September 5-19); an astonishing 44.5 percent of those invited to be reinterviewed participated. In addition to the reinterviews, the study also includes many hours of listening data as recorded in the diaries and a review of many Diary Comment pages.

Once the data were collected and tabbed, in an unprecedented move, Arbitron invited a number of key industry leaders to review the data and provide input that helped shape the study. We opened up the vault, so to speak, because recent events dictated that Arbitron take exceptional actions to serve our community. We thank the consultants, program directors and operations managers for sharing their expertise and wisdom and helping Arbitron with this effort. The consultants who helped were Nick Anthony, Alex Demers, Fred Jacobs, Bill Pasha, Walter Sabo, Jack Swanson, Jim Richards and Ted Ruscitti.

Key Findings

Radio did an incredible job on September 11. Of those polled, 91 percent gave radio a 5, 6 or 7 on a 1-7 scale when asked how well radio covered the attack on Day One.

The power of radio really kicked in after September 11 when radio became a coping mechanism, offering listeners a sense of community and connection. Whether inviting listener call-ins or supporting a fundraising drive for victims' families, stations offered people something positive to do (one in five respondents contributed to a radio station's fundraising efforts). Sixty-five percent of listeners said radio helped them deal with the crisis.

Most listeners (94 percent) remain loyal to the stations that were their favorites before September 11, in part because these stations changed their programming during the crisis and listeners were able to stay abreast of what was happening. About 30 percent of Americans believe that they are spending more time with radio since the attacks.

Radio rose to the occasion and performed brilliantly. Going forward, stations might be better prepared by developing a plan for use if the United States faces another crisis situation.

Programming: Key Findings

- The attacks of September 11 were a visual event—and, perhaps, the biggest event of our lifetime. Television was the primary choice for Americans seeking information on that day.
- While it was *not* the primary information source in many cases, there is a unanimous opinion that radio did an incredible job handling the event. Over 95 per cent of those queried felt their station reacted appropriately to the attacks.
- Initial coverage of the attacks belonged to television, but, in interview after interview, it was stated that the healing process and promotion-of-community were clearly radio's roles and strengths.

In the words of one person interviewed for the study, radio “mopped up” and helped “stitch” the country back together.

- More than half of all Americans felt radio helped them deal with the crisis.

Some verbatims:

“Music is better than medication.”

“[Radio helped] by keeping normalcy in your life.”

“[Radio] made me feel part of the community and connected to a group of people.”

“[On radio I could] listen to all the people talk about what they were going through.”

“[Radio] made you feel like you weren't alone.”

“[I] was happy to get away from the TV and listen to music.”

“[Radio stations] keep your mind off it and bring you back to normal.”

- Although this was a national story, there were different reactions among U.S. citizens. The differences were according to age and geography. Only radio has the ability to serve each group.
- The power of radio to target specific ages, regions and races allowed radio to meet our unique needs in a way network television could never consider.
- To the surprise of many, most Americans did *not* leave the station they were listening to at the time of the attacks. It's worth noting, most stations immediately changed programming and worked to meet the informational needs of their listeners, minimizing the need for listeners to leave.
- Almost 60 percent of all listeners were aware of stations sponsoring fundraising events. Of this 60 percent, about one in four personally contributed.
- Listeners felt positive about advertisers contributing to a relief fund.

- The attacks changed our way of thinking. Most agree, things will never be the same again.
- Almost half of all listeners report an increased interest in religion and their spirituality.
- Listeners are more patriotic than ever. Many report placing flags on their house *and* on their vehicle.

Did Radio Listening Go Up? YES!

One of the most-often-asked questions was “What happened to radio listening on September 11 and in subsequent days and months?”

We are able to answer this question two different ways:

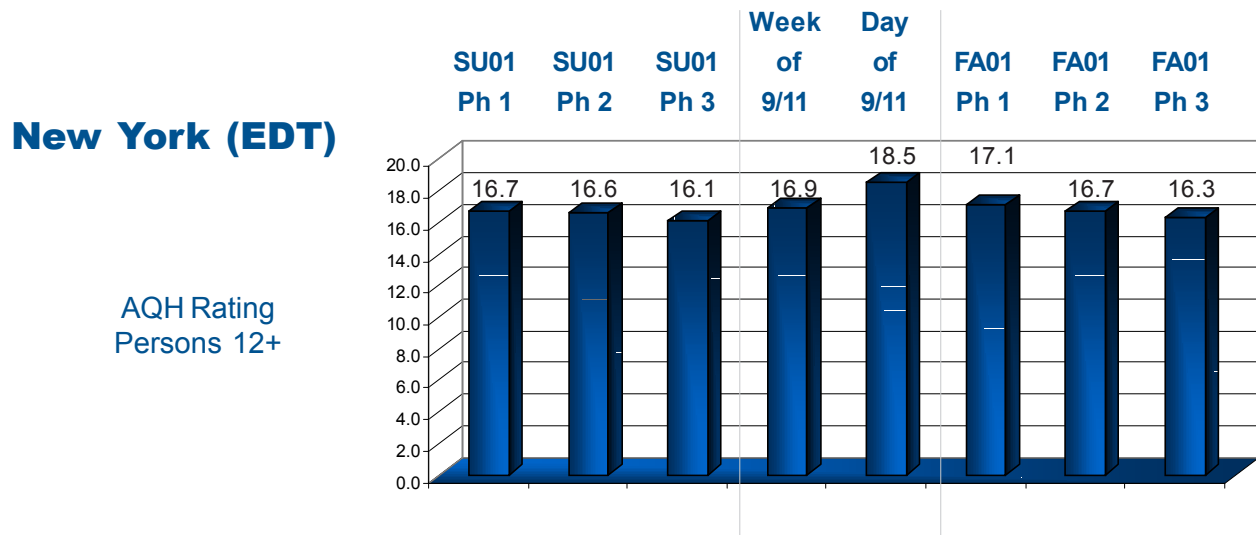
1. Our initial reinterviews with diarykeepers yielded this information; nearly one third of all Americans answered “Agree” or “Strongly Agree” to the statement “*I find myself listening to radio more since September 11.*”

Among 12- to 17-year-olds, the percentage of “Agree/Strongly Agree” was nearly 50 percent.

2. As shown in the following graphs, Radio clearly showed increased usage in the top 10 markets on September 11. On an average basis, the Persons Using Radio rating rose from 15.5 during that week (including both September 11 and September 12) to 17.7 on the day of the events, an increase of over 14 percent. And from Summer 01 Phase 3 to Fall 01 Phase 1, most of these same markets showed increased listening.*

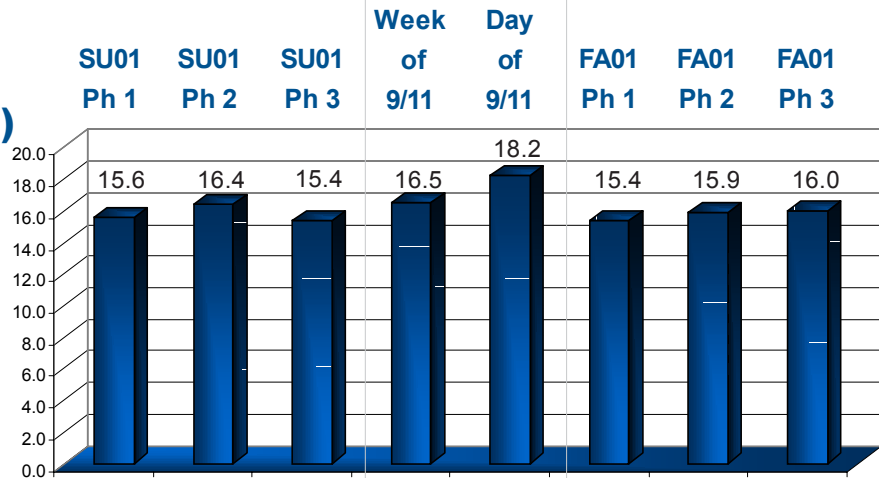
Market	SU01 Ph 3	FA01 Ph 1	Market	SU01 Ph 3	FA01 Ph 1
New York	16.1	17.1	Philadelphia	16.0	16.8
Los Angeles	15.4	15.4	Washington DC	14.7	14.6
Chicago	16.0	16.2	Boston	15.3	15.2
San Francisco	13.6	14.3	Houston / Galveston	16.2	16.6
Dallas / Ft. Worth	15.2	14.6	Detroit	15.4	15.5

* September 11, 2001, occurred on a Tuesday. This was the next to last day . . . of the next to last week . . . of the Summer 2001 survey. One methodological note about the data is that it's clear that the Arbitron diary still does an excellent job of measuring radio listening. The diary was responsive to the terrorist-caused spike in the day's listening, even with just a one-week sample (one-twelfth of the sample for the entire Summer survey).



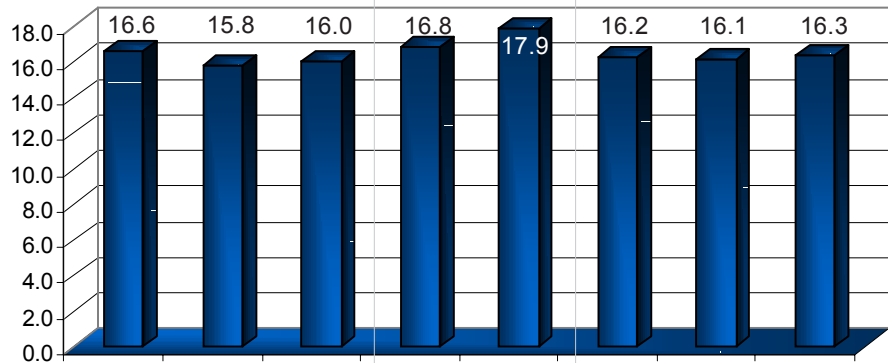
Los Angeles (PDT)

AQH Rating
Persons 12+



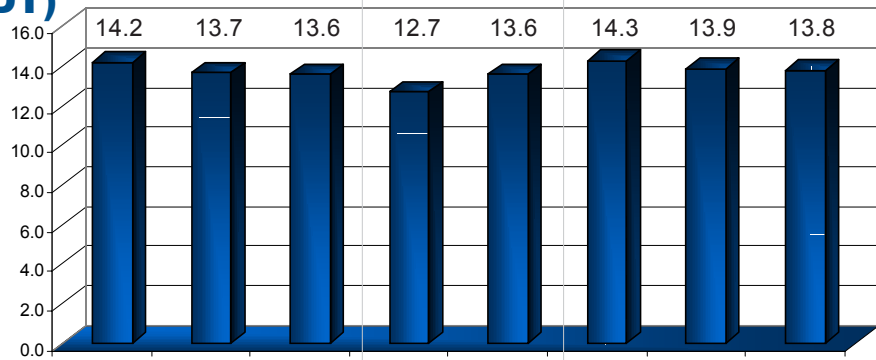
Chicago (CDT)

AQH Rating
Persons 12+



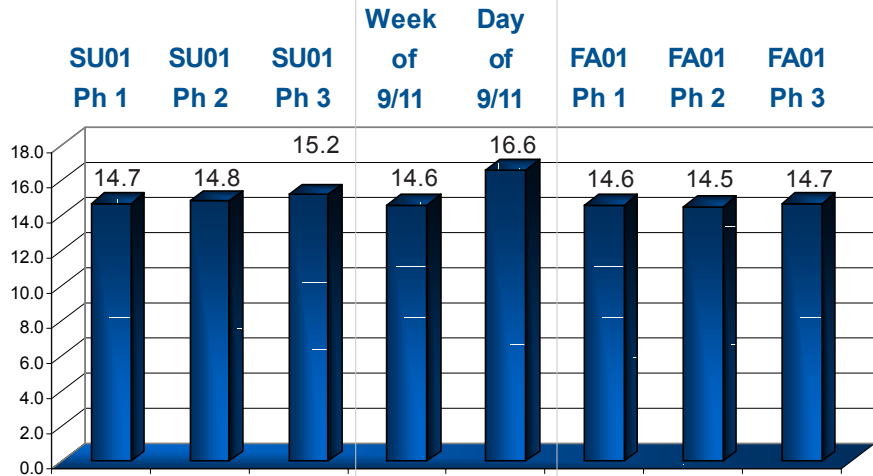
San Francisco (PDT)

AQH Rating
Persons 12+



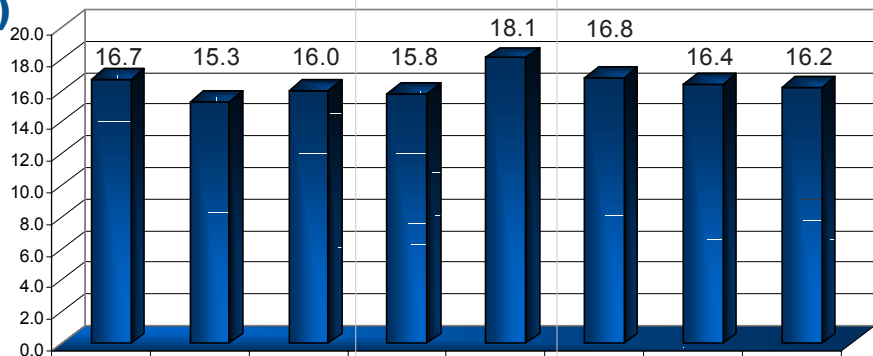
Dallas / Ft Worth (CDT)

AQH Rating
Persons 12+



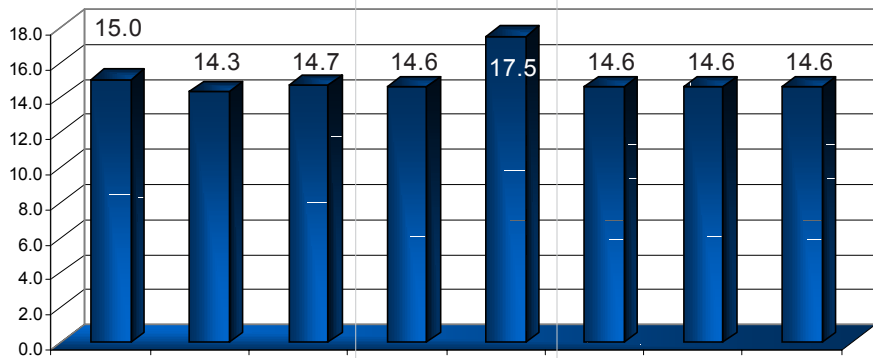
Philadelphia (EDT)

AQH Rating
Persons 12+



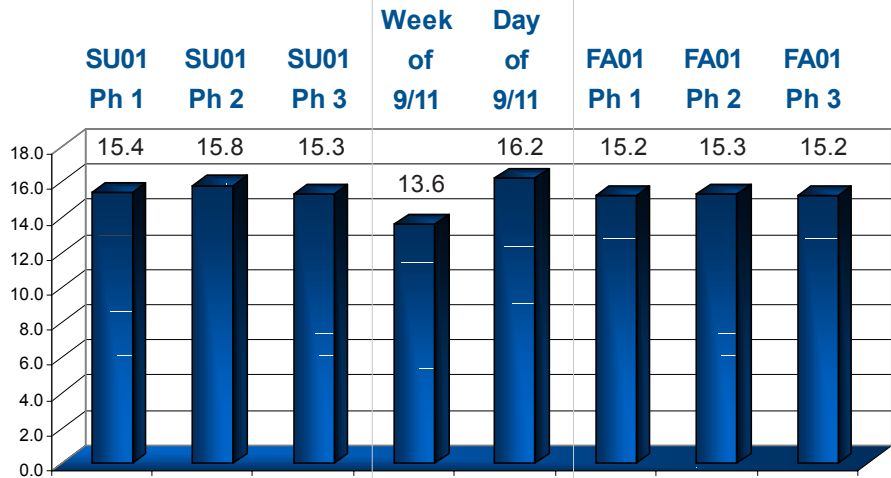
Washington, DC (EDT)

AQH Rating
Persons 12+



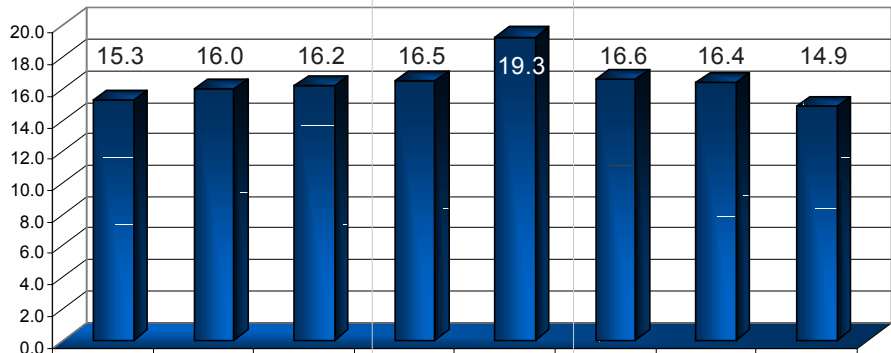
Boston (EDT)

AQH Rating
Persons 12+



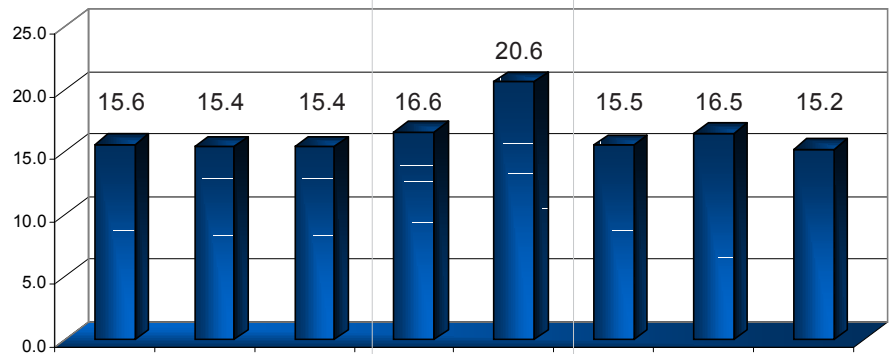
Houston / Galveston (CDT)

AQH Rating
Persons 12+



Detroit (EDT)

AQH Rating
Persons 12+



One Station's Story

Most Americans turned to television to follow the highly visual series of events that unfolded on the morning of September 11. In New York City, where much of the tragedy was taking place, eight of New York's biggest TV stations were knocked off the air for at least a day since their transmitters were on top of the doomed North Tower. While the stations were still able to reach viewers via cable or satellite TV, radio became a primary news source for many of the more than 15 million people in the New York Metro's estimated 12+ population.

1010 WINS-AM is one of two all-news radio stations owned by Infinity in New York City. During the 10:00 - 11:00 a.m. hour—which began 20 minutes after a jetliner crashed into the Pentagon and 10 minutes after the first of the two World Trade Center towers collapsed—WINS had a 23.9 share. That means one out of every four people aged 12 and older in the New York Arbitron Metro who were *listening* to radio were listening to WINS. The station's AQH Rating during that hour was 6.1, meaning one out of every 16 people aged 12 and older who *live* in the New York Metro was listening to WINS.

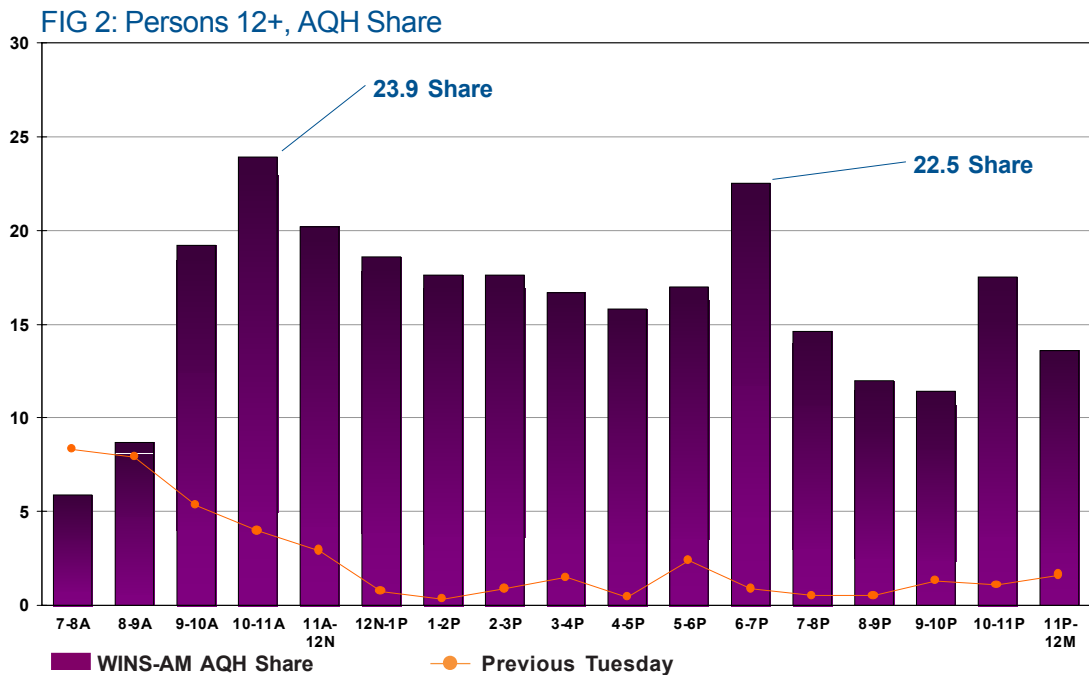
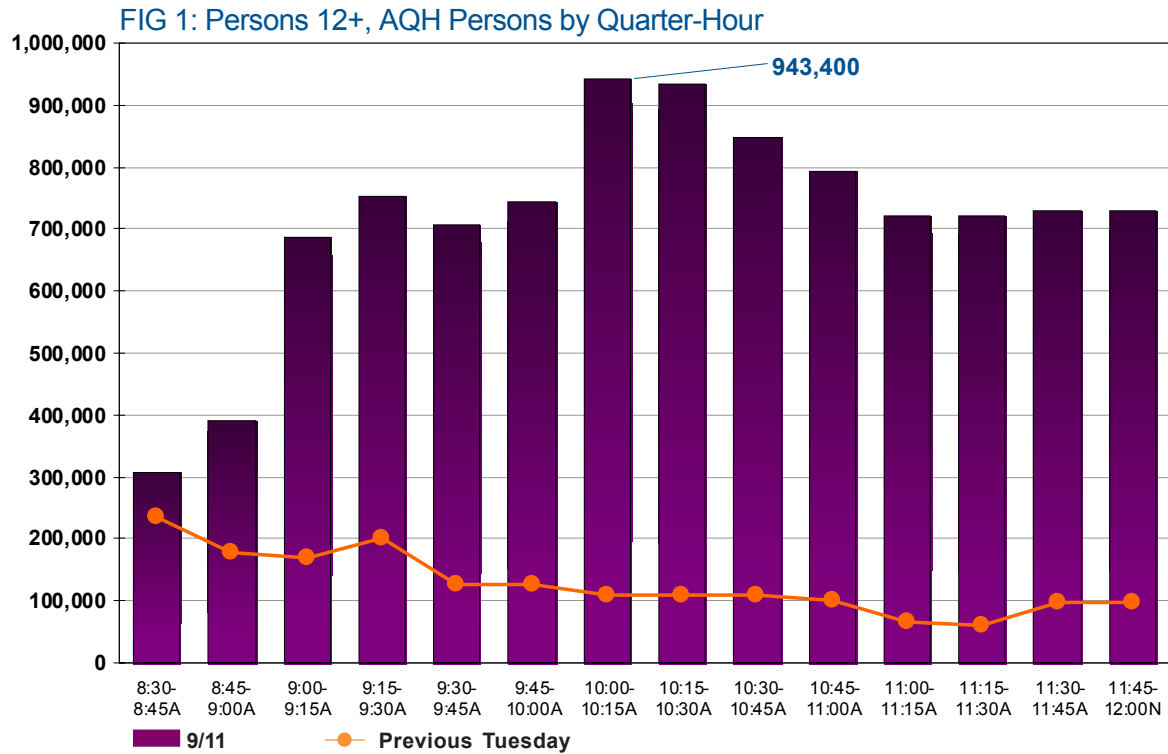
According to Bob Michaels, vice president of Programming Services for Arbitron, between 10:00 and 10:15 a.m. on September 11, 2001, "WINS had what Arbitron believes is the highest Average Quarter-Hour Persons estimate ever for a single quarter-hour in radio. During this 15-minute period, WINS's Average Quarter-Hour estimate for Persons 12+ was 943,400, about nine times higher than the AQH Persons audience estimated for the station at the same time the week before September 11."

"Any way you look at it, the WINS audience on September 11 was enormous, especially at its peak that morning between 10:00 and 10:15," Michaels said. With radio's ability to be portable and go nearly anywhere the listener is, no other medium can provide the up-to-date information as quickly as radio can.

Talk radio stations subsequently provided emotional support for many people by helping listeners cope with the crisis after the initial shocks were over. As the Arbitron estimates for WINS point out, one can never assume how a particular disaster—manmade or natural—will affect the ability of the various media to reach their audiences.

On September 11, most of the country's over 13,000 radio stations became news stations, and regardless of the AQH and share numbers they generated, by all accounts, each did a splendid job.

1010 WINS-AM, New York, 9/11



Diary Analysis

Many diaries told the story of listeners learning about the event on radio and then turning to television to watch events unfold.

Los Angeles, Tuesday, September 11, 2001, Summer 2001, Phase 3, Week 3

TUESDAY									
	Time		Station <small>Call letters, dial setting or station name Don't know? Use program name.</small>	Mark <input checked="" type="checkbox"/> one		Mark <input type="checkbox"/> one			
	Start	Stop		AM	FM	At Home	In a Car	At Work	Other Place
→ Early Morning <small>(from 5 AM)</small>	7:00	7:15	KLON	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			
	:	:	turned on tv watched it all day! What a nightmare						
	:	:							
:	:								
→ Midday	:	:							
	:	:							
	:	:							
→ Late Afternoon	:	:							
	:	:							
	:	:							
→ Night <small>(to 5 AM Wednesday)</small>	:	:							
	:	:							
	:	:							

If you didn't hear a radio today, please mark here.

TUESDAY										
	Time		Station <small>Call letters, dial setting or station name Don't know? Use program name.</small>	Mark <input type="checkbox"/> one		Mark <input type="checkbox"/> one				
	Start	Stop		AM	FM	At Home	In a Car	At Work	Other Place	
→ Early Morning <small>(from 5 AM)</small>	:	:	WATCHED TV ABOUT WORLD TRADE CENTER :-(
	:	:		+didn't drive anywhere						
	:	:								
→ Midday	:	:								
	:	:								
	:	:								
→ Late Afternoon	:	:								
	:	:								
	:	:								
→ Night <small>(to 5 AM Wednesday)</small>	:	:								
	:	:								
	:	:								

If you didn't hear a radio today, please mark here.

Los Angeles, Tuesday, September 11, 2001
Summer 2001, Phase 3, Week 3

TUESDAY									
	Time		Station Call letters, dial setting or station name <i>Don't know? Use program name</i>	Mark <input checked="" type="checkbox"/> one		Mark <input checked="" type="checkbox"/> one			
	Start	Stop		AM	FM	At Home	In a Car	At Work	Other Place
Early Morning (from 5 AM)	:	:							
	:	:							
	:	:							
Midday	:	:							
	:	:							
	:	:							
Late Afternoon	:	:							
	:	:							
	:	:							

Houston-Galveston,
Tuesday, Wednesday,
September 11, 12, 2001,
Summer 2001, Phase 3, Week 3

WEDNESDAY									
	Time		Station Call letters, dial setting or station name <i>Don't know? Use program name</i>	Mark <input checked="" type="checkbox"/> one		Mark <input checked="" type="checkbox"/> one			
	Start	Stop		AM	FM	At Home	In a Car	At Work	Other Place
Early Morning (from 5 AM)	:	:							
	7:00	7:10	KQVE		X	X			
	:	:							
Midday	8:45	9:55	KILT		X	X			
	10:00	10:30	"		X				
	:	:							
Late Afternoon	5:50	6:35	KILT		X		X		
	:	:							
	:	:							
Night (to 5 AM Thursday)	10:45	11:10	KILT		X	X			
	:	:							
	:	:							

If you didn't hear a radio today, please mark here.

If you didn't hear a radio today, please mark here.

TUESDAY										
	Time		Station Call letters, dial setting or station name Dial setting? Use numeric name	Mark (X) one			Mark (X) one			
	Start	Stop		AM	FM	At Home	In Car	At Work	Other Place	
Early Morning (from 5 AM)	5:30	8:00	WEZL 103.5		X	X				
	8:00	8:25	WJLY 108.5		X		X			
	8:50	9:20	WJLY 108.5		X		X			
	9:30	:	WJLY 103.5		X			X		
Midday	:	:	Clear Channel							
	:	:	broadcast 730							
	:	:								
	:	:								
Late Afternoon	4:30	4:45	WJLY 103.5		X	X				
	:	:	Clear Channel							
	:	:	broadcast 730							
	:	:								
Night (to 5 AM Wednesday)	10:00	11:00	WEZL 103.5		X	X				
	:	:	Clear Channel							
	:	:	broadcast 730							

Charleston, Tuesday, September 11, 2001, Summer 2001, Phase 3, Week 3

It's worth noting that this listener understood that they were hearing their favorite station's . . . sister-station's . . . news department.

It's also unusual to see an owner, Clear Channel, mentioned in a diary.

If you didn't hear a radio today, please mark (X) here.

6

3 Where do you live?
 City San Pedro
 County Los Angeles
 State CA
 ZIP 910731

6 Thinking back 6 months ago, what radio station did you listen to the most at that time? Write down call letters, dial setting or station name. Mark (X) AM or FM.
93.1 AM FM

4 Are you employed either full time or part time? Mark (X) "Yes" or "No."
 Yes No
 If yes: How many hours per week are you usually employed? Mark (X) one.
 Less than 35
 35 or more
 What is the ZIP code at your usual place of work?
910275

Los Angeles, Summer 2001, Phase 3, Week 4

This diary comment, in the week after September 11, speaks to radio's therapeutic effect on listeners.

For one person in your household

Please choose only one person age 18 or older in your household to answer these Household Questions.

7 How many children under age 12 live in this household?
 Children (Enter number) None

8 Which of the following categories best describes your total household income from all sources (before taxes) for the past year? Mark (X) one.
 Less than \$25,000
 \$25,000 - \$49,999
 \$50,000 - \$74,999
 \$75,000 or more

Your opinion counts

Use this space to make any comments you like about specific stations, announcers or programs.

Joe Benson is Great.
93.1 plays the Best Classic Oldies
I like the "Beatles in the morning", especially on 103.7.

Listening to the radio over the past week has been the biggest + best comfort to me after this horrible tragedy in the U.S.A.

TUESDAY									
	Time		Station Call letters, dial setting or station name <i>Don't know? Use program name.</i>	Mark <input checked="" type="checkbox"/> one		Mark <input checked="" type="checkbox"/> one			
	Start	Stop		AM	FM	At Home	In a Car	At Work	Other Place
Early Morning (from 5 AM)	8:30	9:00	CD 101.9		X		X		
	:	:	<i>wonderful coverage of the world trade center crisis!!!</i>						
	:	:							
Midday	11:30	12:30	CD 101.9		X		X		
	:	:							
	:	:							
Late Afternoon	4:30 3:30	7:30 4:00	CD 101.9		X		X		
	:	:							
	:	:							
Night (to 5 AM Wednesday)	:	:							
	:	:							
	:	:							

Tuesday, September 11, 2001,
Summer 2001, Phase 3, Week 3

Music stations became "news" stations on that day. Listeners seemed to be "okay" with that.

Quick questions...

For you

The following questions apply to you yourself. Each household member should complete these questions in his or her own diary. Your answers will be kept in the strictest confidence.

1) What is your age?
44 years

2) Are you male or female?
 Male Female

3) Where do you live?
City: Wyckoff
County: Bergen
State: NJ
ZIP: 07481

4) Are you employed either full time or part time?
Mark "Yes" or "No."

Yes No
If yes: How many hours per week are you usually employed? Mark one.
 Less than 35
 35 or more
What is the ZIP code at your usual place of work?
07011

5) What was the last grade of school you completed?
Mark one.
 Less than 12th grade
 High school graduate or GED
 More than 12th (some college)
 Bachelor's degree or higher

6) Thinking back 6 months ago, what radio station did you listen to the most at that time? Write down call letters, dial setting or station name. Mark AM FM.
104.3 K-ROC

For one person in your household

Please choose only one person age 18 or older in your household to answer these Household Questions.

7) How many children under age 12 live in this household?
 Children None
(Enter number)

8) Which of the following categories best describes your total household income from all sources (before taxes) for the past year? Mark one.
 Less than \$25,000
 \$25,000 - \$49,999
 \$50,000 - \$74,999
 \$75,000 or more

Your opinion counts

Use this space to make any comments you like about specific stations, announcers or programs.

Tues, Sept, 11, 2001, was a difficult day for most Americans, esp. those of us living within the NYC area. I found 101.9 the best coverage of the situation. The DJ² never voiced an opinion - just stuck to the facts & no song parodies. Good job 101.9!!!

TUESDAY									
	Time		Station Call letters, dial setting or station name <i>Don't know? Use program name.</i>	Mark <input type="checkbox"/> One		Mark <input type="checkbox"/> One			
	Start	Stop		AM	FM	At Home	In a Car	At Work	Other Place
→ Early Morning (from 5 AM)	:	:							
	8:30	:	Radio reports on		✓			✓	
	:	:							
→ Midday	:	:	The terrorist						
	:	:	Attack						
	:	:							
→ Late Afternoon	:	3:30							
	:	:							
	:	:							
→ Night (to 5 AM Wednesday)	:	:							
	:	:							
	:	:							

Tuesday, September 11, 2001, Summer 2001, Phase 3, Week 3

While only a few diaries came in that couldn't be credited to a single station, PDs may want to do their part in making certain listeners know where they're getting their information.

	Hora/Time		Estación/Station Siglas, posición del dial o nombre de la estación. (No les sabe? Use el nombre del programa.) Call letters, dial setting or station name (Don't know? Use program name.)	Marque uno <input type="checkbox"/> Mark one		Marque uno <input type="checkbox"/> Mark one			
	Comience Start	Termine Stop		AM	FM	En su casa At Home	En un auto-móvil In a Car	En el trabajo At Work	En otro sitio Other Place
→ Temprano en la mañana Early Morning (desde 5 AM / from 5 AM)	5:20	6:10	107.9		X		X		
	:	:							
	8:00	:	97.1 KLSX		X		X		
→ A mediodía Midday	:	:	HOWARD						
	:	:	STERN						
	:	:	N.Y. Bombing Coverage						
→ En la tarde Late Afternoon	:	3:00							
	3:30	4:00	99.5 KKLA		X				
	:	:							
→ De noche Night (hasta las 5 AM martes/ to 5 AM Tuesday)	:	:							
	:	:							
	:	:							

A number of stations dropped regular programming for news coverage.

Su opinión cuenta

Use este espacio para hacer cualquier comentario que desee sobre estaciones específicas, anunciadores o programas.

Your opinion counts

Use this space to make any comments you like about specific stations, announcers or programs.

Tuesday, September 11, 2001, Summer 2001, Phase 3, Week 3

Another sample of listeners hearing—and understanding—something other than the regular programming on their favorite station.

I appreciate that on the day of the terrorist attack 104.7 had news affiliate on and reported on the disaster.

Lista de verificación

Por favor, revise su diario:

- ¿Anotó todas las veces que oyó la radio esta semana?
- ¿Anotó las siglas, posición del dial o el nombre de cada estación que oyó?
- ¿Marcó AM o FM para cada estación?
- ¿Marcó si estaba escuchando en su casa, en un automóvil, en su trabajo o en algún otro sitio?
- ¿Marcó el cuadrado al pie de la página cada

Checklist

Please review your diary. Did you:

- Write down all the times you heard a radio this week?
- Write the call letters, dial setting or station name for each station you heard?
- Mark AM or FM for each station?
- Mark whether you listened at home, in a car, at work or some other place?
- Mark the box at the bottom of the page for each day you didn't hear a radio?

Quick questions...

For you

The following questions apply to YOU YOURSELF. Each household member should complete these questions in his or her own diary. Your answers will be kept in the strictest confidence.

- 1** What is your age?
14 years
- 2** Are you male or female?
Mark one. Female
- 3** Where do you live?
City: Alhambra
County: Los Angeles
State: California
ZIP: 91803
- 4** Are you employed, either full time or part time?
Mark "Yes" or "No."
If yes: How many hours per week are you usually employed? Mark one.
 Less than 35
 35 or more
What is the ZIP code at your usual place of work?
[] [] [] [] []
- 5** What was the last grade of school you completed?
Mark one.
 Less than 12th grade
 High school graduate or GED
 More than 12th (some college)
 Bachelor's degree or higher
- 6** Thinking back 6 months ago, what radio station did you listen to the most at that time? Write down call letters, dial setting or station name. Mark AM or FM.
KPRS 102.7 AM FM
- 7** How many children under age 12 live in this household?
 Children (Enter number) None
- 8** Which of the following categories best describes your total household income from all sources (before taxes) for the past year? Mark one.
 Less than \$25,000
 \$25,000 - \$49,999
 \$50,000 - \$74,999
 \$75,000 or more

For one person in your household

Please choose only one person age 18 or older in your household to answer these Household Questions.

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 Children (Enter number) None
- 8** Which of the following categories best describes your total household income from all sources (before taxes) for the past year? Mark one.
 Less than \$25,000
 \$25,000 - \$49,999
 \$50,000 - \$74,999
 \$75,000 or more

Your opinion counts

Use this space to make any comments you like about specific stations, announcers or programs.

I think KIS 102.7 has the terrorists attacked America. It's good that the radio stations ask for donations and keep up with the updates.

Answer the Quick questions?

Tuesday, September 11, 2001, Summer 2001, Phase 3, Week 3

Listeners supported and almost expected radio's fundraising.

NON-ENG 1-01

TUESDAY									
	Time		Station Call letters, dial setting or station name <i>Don't know? Use program name</i>	Mark <input checked="" type="checkbox"/> one		Mark <input checked="" type="checkbox"/> one			
	Start	Stop		AM	FM	At Home	In a Car	At Work	Other Place
Early Morning (from 5 AM)	:	:							
	6:30	:	KFI 98		✓				
	:	:							
Midday	:	:							
	:	:							
	:	:							
Late Afternoon	:	:							
	:	:							
	:	:							
Night (to 5 AM Wednesday)	:	:							
	:	:							
	:	:							

Excellent job on coverage of terrorist attack

MARTES/TUESDAY									
	Hora/Time		Estación/Station Signs, posición del dial o número de la estación. (No lo sabe? Use el nombre del programa.) Call letters, dial setting or station name <i>Don't know? Use program name</i>	Marque uno <input checked="" type="checkbox"/> Mark one		Marque uno <input checked="" type="checkbox"/> Mark one			
	Comience Start	Termine Stop		AM	FM	En su casa At Home	En un automóvil In a Car	En el trabajo At Work	En otro sitio Other Place
Temprano en la mañana Early Morning (desde 5 AM / from 5 AM)	:	:							
	9:AM	:	1010 WINS		X			X	
	:	:							
A mediodía Midday	:	:							
	:	:							
	:	:							
En la tarde Late Afternoon	:	:	World Trade Center Attack						
	:	:							
	:	:							
De noche Night (hasta las 5 AM miércoles / to 5 AM Wednesday)	:	:							
	:	:							
	:	:							

In a number of diaries, we observed listeners tuning in, and then staying with the station for the full day.

One-on-One Interviews

Ed Shane and Keith Rovell, of Shane Media, conducted one-on-one interviews with 30 diarykeepers from the Summer 2001 survey. The following two pages detail key findings.

A sense of community

In a way, radio became a coping mechanism, offering a sense of community and connection. Whether inviting listener call-ins or supporting a fund drive, stations offered people something to do in a situation in which nothing could be done.

Several respondents referred to the “outlet” that stations provided when they allowed listeners on the air to share their feelings. A respondent from Milwaukee liked “hearing other voices” sharing their feelings about the attacks.

The man from Virginia Beach said that people who were having a hard time dealing with their emotions (“justifying their emotions” were his words) had a chance to know that their neighbors were feeling the same fears and asking the same questions they were. He took comfort in that.

Our Atlanta respondent appreciated the fact that stations offered the opportunity to talk, “but that’s not what I was interested in.” By contrast, the man from Katonah in the New York market called hearing others “very important.” So did the respondent from Southold, NY: “It’s kind of comforting to talk about something when it’s bothering you. To hear other people’s views was better than hearing music or other (non-attack) news.”

In the words of the woman from Toledo: “You shared the same shock with them. Everybody was scared. They didn’t know what was happening, and they gave the same feeling on the radio.”

Most in the interviews were positive about stations joining in with fundraising or blood drives. (One woman told us about hearing a station offering free American flag tattoos!)

The feeling was that a station might do it for the ratings at another time, but not in a situation as serious as the terrorist attacks. A young mother from L.A. put it best: “Right now I think everybody’s trying to help. Our greed has kinda left us for a little bit.”

What to do next time

We asked respondents to offer advice to radio stations should a similar attack or national crisis occur again. While this is an area that lends itself to quantitative study, it was interesting to find that most people suggested that not much more could have been done than stations did during the days after September 11.

This response seems to be a combination of two lines of thinking. First, there's an understanding of the complexity of the event, that no one could be ready to cover such an unprecedented and devastating attack. Second, there's the expectation of radio's role. Those who said radio did all it could were also saying that the medium did all they expected it to.

The advice we can glean speaks less to radio than to the frustration of listeners who felt left in the dark by the shattering events. Other than the dramatic pictures and the horror of the fires and destruction, real information was slow to emerge. Electronic media were rife with speculation and commentary.

We did hear from a Milwaukee respondent who asked that stations "check facts."

Similarly, a man in Philadelphia suggested, "Concentrate totally on emergency news and give all strict details immediately, telling you everything, leaving nothing out. Don't panic the people. Tell the people all the information."

For music stations, there was a call for "More news and less normal programming," to use the words of the man from Virginia Beach. However, that feeling was not universal. Anyone who followed the events on television could only speculate what their favorite radio station was doing.

How long should music stations carry news and not regular programming? The consensus here is that they should do so "until there's nothing new."

Clearly a judgment call for the stations.

Ed Shane is the founder of Shane Media, a company that grows ratings and revenues for radio station clients and other media partners with custom programming direction for a variety of radio formats and custom-designed, predictive audience research.

Keith Rovell is an associate at Shane Media. He analyzes station performance and provides input about on-air execution and works with news departments to outline strategies, and with talk show hosts to develop topics.

Reach Shane Media in Houston by phone at 713-952-9221 or e-mail at smsofc@shanemedia.com.

Sales Findings and Recommendations

Americans feel obligated to support the economy.

Very few Americans have postponed a purchase of any kind because of the crisis.

Advertisers should give serious consideration about getting involved in the relief effort.

This is especially true for retailers catering to a younger consumer. 40 percent of all Americans will support those who support the relief efforts.

Listeners support continuing radio contesting.

Targeting consumers on radio remains very easy.

Overwhelming numbers of consumers stayed with their favorite stations.

Radio did a remarkable job during the crisis.

Over a third of all Americans report listening to more radio now than they did before the attack on America. This is especially true for black and Hispanic radio consumers.

One in five *music station* listeners participated in their favorite station's fundraising effort.

This underscores the powerful role local radio plays in the lives of Americans during these troubled times. It also highlights radio's power to promote community.

Life is different.

An overwhelming number of Americans feel "things" have changed forever as a result of the September 11 attack. As a trusted and immediate source of information, radio is poised for future growth.

Of those surveyed, 58 percent said it was OK for radio stations to play commercials the first day or two after a terrorist event.

About 61 percent actually indicated advertisers should have continued running their commercials a day or two after.

According to some of the in-depth interviews, listeners perceive commercials as part of the "return to normalcy" so many crave.

9/11 Events Time Line

Time Line for the Attacks and Related Events on Tuesday, September 11, 2001 (all times EDT)

- 7:59AM American Airlines Flight 11 departs from Boston's Logan International Airport bound for Los Angeles.
- 8:01AM United Airlines Flight 93 leaves Newark International Airport bound for San Francisco.
- 8:14AM United Airlines Flight 175 leaves Boston for Los Angeles.
- 8:45AM American Airlines Flight 11 crashes into the north tower of the World Trade Center.
- 9:03AM United Airlines Flight 175 slams into the south tower of the World Trade Center.
- 9:31AM President George W. Bush calls the crashes an "apparent terrorist attack on our country."
- 9:40AM American Airlines Flight 77 departs from Ronald Reagan Washington National Airport bound for Los Angeles and soon after takeoff, crashes into the Pentagon.
- 9:48AM The Capitol and West Wing of the White House are evacuated.
- 9:49AM The Federal Aviation Administration grounds all flights across the country. Domestic flights in progress are directed to nearby airports, and international flights bound for the U.S. are rerouted to Canada.
- 9:50AM Two World Trade Center (the south tower) collapses.
- 9:58AM A passenger on United Flight 93 makes a 911 call and tells the emergency operator the flight is being hijacked.
- 10:00AM United Flight 93 crashes in a field 80 miles from Pittsburgh.
- 10:29AM One World Trade Center (the north tower) crumbles.
- 10-11:30AM Government buildings around the country are evacuated. The United Nations building is closed down, and the Securities and Exchange Commission closes all U.S. financial markets for the day.
- 11:40AM President Bush arrives at Barksdale Air Force Base, LA, from Florida after deciding not to return Washington right away. He later flies to the U.S. Strategic Command at Offutt Air Force Base in Nebraska before returning to Washington, D.C.
- 5:25PM Seven World Trade Center collapses.
- 7:00PM President Bush arrives in Washington.
- 8:30PM The President addresses the nation, saying "thousands of lives were suddenly ended" in the attacks earlier in the day.

Radio Revenue

As shown in the table below, in 2001, radio ad sales revenue was off 7.4 percent from the previous year. While it may be tempting to fault September 11 for lost revenues, further examination discloses that we were in a recession at the time of the terrorist attacks.

The Economic Time Line on the next two pages is provided in order to help put September 11 economic ramifications into perspective.

2001 OVERALL RADIO REVENUE GROWTH Estimated Radio Revenue (in billions)

Source: RAB

LOCAL	NATIONAL	NETWORK ESTIMATE	TOTAL
2001 \$14.552 (-4%)	2001 \$2.898 (-19%)	2001 \$.910 (-9%)	2001 \$18.360 (-7.4%)
2000 \$15.223	2000 \$3.596	2000 \$.998	2000 \$19.819

Local and national revenues are based on a pool of more than 100 markets, as reported by the accounting firm of Miller Kaplan Arase & Co.



see **Economic Time Line**
on the next page

Economic Time Line

This time line is provided to describe the U.S. economy around September 11, 2001.

1999

- March** The Dow Jones industrial average breaks through 10,000 for the first time.
- April** The Dow breaks through 11,000 for the first time.
- December** *Time* magazine chooses Jeff Bezos of Amazon.com as Person of the Year.
- Christmas 1999 lives up to its billing as America's first e-Christmas. Consumers tripled online purchases to more than \$10 billion. (Source: Business Week, 1/17/00)

2000

- January** Unemployment sinks to 4 percent, a three-decade low. (Source: Dept. of Labor)
- 16 of the 33 Super Bowl advertisers are dot.coms (up from two that advertised during the 1999 Super Bowl). ABC raises the price of an average 30-second slot by almost 40 percent to a record \$2.2 million. (Source: Financial Times, 1/28/00)
- AOL and Time Warner announce their intent to merge and create "the world's first fully integrated media and communications company for the Internet Century" in an all-stock combination valued at \$350 billion. (Source: AOL Time Warner press release)
- The Dow briefly tops 12,000. (Source: Washington Post, 12/31/00)
- March** The Nasdaq composite index closes above 5000 for the first time, just four months after it first crossed the 3000 mark.
- April** A federal judge finds Microsoft guilty of violating antitrust law.
- On the same day as the Microsoft ruling, investors take the money and run from high-priced technology stocks, causing a 7.6 percent plunge in the Nasdaq index and the index's single largest point drop (349.45) in one day.
- November** Election Day is on November 7, but the outcome is not settled until December 13, when Al Gore concedes for good.
- December** After soaring 86 percent in 1999 and jumping another 25 percent in the first 10 weeks of 2000, the Nasdaq ends the year 2000 down 39 percent from where it finished 1999, its worst performance since it was established in 1971. The Dow ended the year at 10,786, down more than 6 percent vs. the year before.
- Internet and e-commerce companies like Juno Online, PSI Net, NetZero, drkoop.com, Ask Jeeves, TheGlobe.com, Etoys, beyond.com and priceline all lost 97 percent or more of their value in 2000. (Source: CNN)

2001

- January** The Federal Reserve reduces interest rates for the first of 11 times in 2001.
- March** Etoys files for Chapter 11 bankruptcy.
- The recession officially begins (but this is not known until the National Bureau of Economic Research makes it official on November 26), ending the longest economic expansion (10 years) in American history.
- May** Congress passes federal tax cuts that lead the government to issue refund checks of up to \$300 for individuals and \$600 for couples.

2001 *continued*

September On September 11, terrorists hijack four airliners and crash them into the World Trade Center, the Pentagon and a rural section of Pennsylvania, resulting in nearly 3,200 deaths.

On September 17, airlines begin announcing large-scale layoffs, and the economic fallout from the September 11 attacks begins to ripple through the economy, particularly affecting the air travel and tourism industries.

October A photo editor at the *National Enquirer* dies from anthrax exposure, the first of five fatalities recorded during the year from an unknown terrorist spreading the disease by mail.

U.S. warplanes begin bombing sites in Afghanistan.

November Microsoft and the U.S. Justice Department announce the settlement of their long-running antitrust case.

The Commerce Department reports that new-home sales rose 6.4 percent in November to a seasonally adjusted 934,000 annual rate, far stronger than the 888,000 annual rate anticipated by economists.

UBS Warburg estimates that total U.S. advertising spending will drop 5 percent to \$232 billion in 2001. The loss from September 11's events—up to \$5 billion. And all forms of media will share in the impact, the firm said. (*Source: Money, 11/01*)

December The nation's unemployment rate is reported at 5.7 percent, its highest level in six years.

Throughout the year, the nation suffered an estimated 1.8 million layoffs, nearly triple the 2000 number. About half the jobs disappeared after September 11. (*Source: San Francisco Chronicle, 12/20/01*)

Enron files for Chapter 11 protection, becoming the largest bankruptcy in American history.

On December 28, the Conference Board reported that its U.S. consumer confidence index rose for the first time in six months and by the highest amount in nearly four years. The closely watched index surged to 93.7 percent from 84.9 percent in November as Americans found cheer in progress in the war in Afghanistan, a recent stock market rally, falling energy prices and some signs that corporate layoffs may be slowing.

The eleven Federal Reserve interest rate cuts in 2001 bring the cost of borrowing money to the lowest level in 40 years.

Webmengers.com, a San Francisco research firm, reports that 537 Internet companies shut down in 2001, a total of 762 since January 2000.

2002

February The Enron mess makes investors nervous that shady accounting may have infected their own portfolios. The Dow declines more than 500 points during January.

The Commerce Department releases a report that shows that GDP, the total output of goods and services produced within the United States, grew at an annual rate of 1.4 percent in the final quarter of 2001. Many economists say they believe the recession of 2001 is over and may turn out to be the country's mildest downturn ever. However, economists caution that because the recession was not a severe one, the recovery is unlikely to be robust. Since housing and autos, as well as many service industries, held up well during 2001, demand probably will not shoot out of the cannon as it has after past recessions.

March Stocks rally in early March, sending the Dow Jones industrial average to its highest close since July 2001. The Dow jumped nearly 218 points on March 4 to 10,586.82. The technology-laced Nasdaq index advanced 56.58 points to 1859.32 on the same date.



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