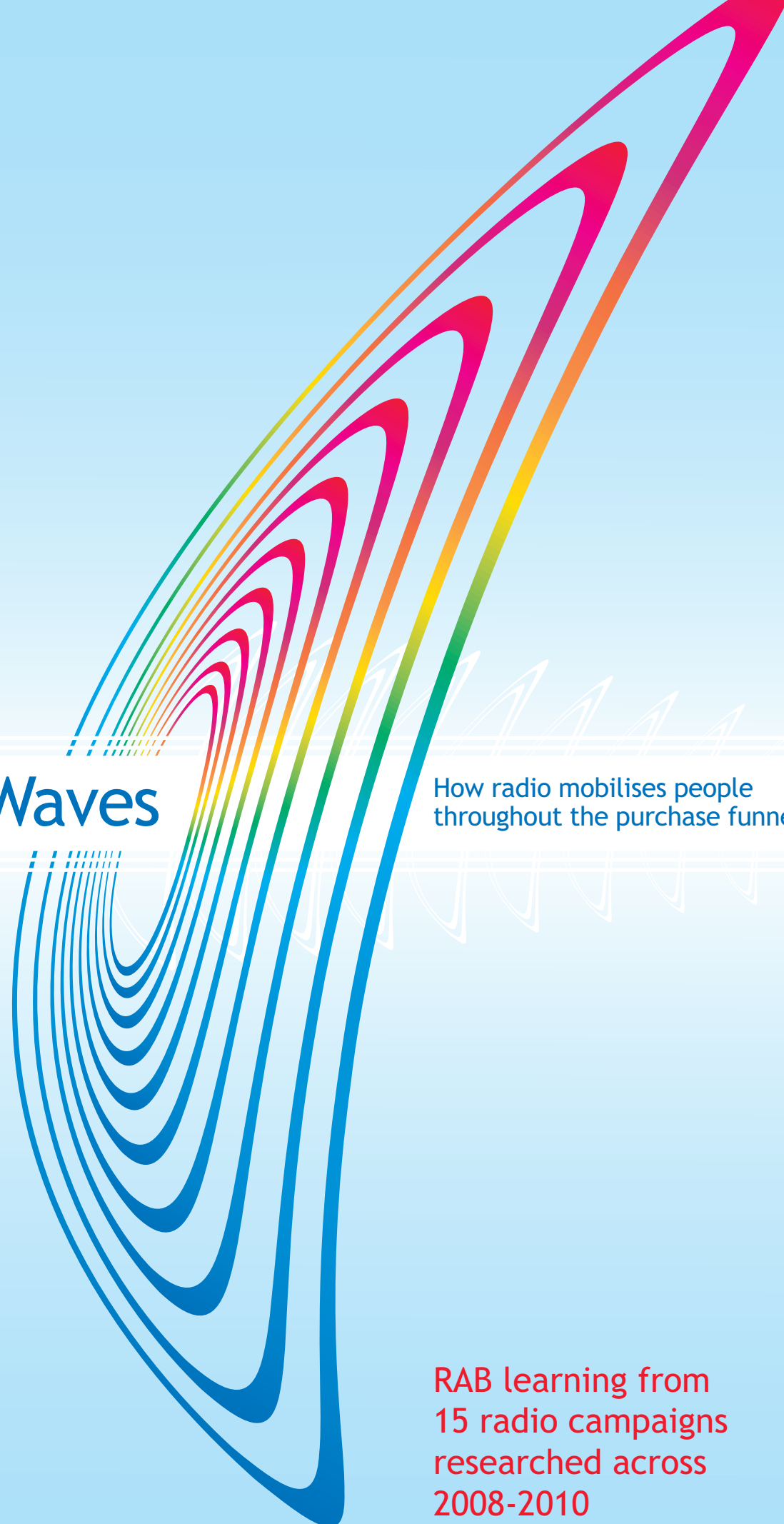


Making Waves



How radio mobilises people
throughout the purchase funnel

RAB learning from
15 radio campaigns
researched across
2008-2010

Introduction

Case studies are vital to understanding effectiveness in communications and marketing, and the commercial radio industry's core service in this area is RadioGauge, the RAB's award-winning, continuous nationwide study which measures not only advertising effectiveness but also creative diagnostics.

However, sometimes brands advertise in a way which makes it difficult for the ongoing RadioGauge surveys to measure effectiveness - sometimes they advertise only in certain regions or over limited periods.

When this happens, bespoke research studies are often set up (sometimes co-funded by the radio stations) using a variety of different methods and techniques - telephone interviews, split-sample surveys, even analysis of respondents' browsing histories.

Within each of these individual studies there is useful insight into the way radio works, and so this project was commissioned to take a closer look at all the results of recent bespoke projects and draw conclusions about radio's advertising effectiveness.

The conclusions all relate to different stages of the '*purchase funnel*' - the stages on the consumer journey towards the purchase of a product or service.

The findings of each individual project remain confidential to the companies involved, so specific brand findings in this review have been made anonymous as appropriate.

The case studies in this review were all drawn from 15 radio campaigns from 8 different categories (retail, pharmaceutical, fmcg, automotive, travel, government, media & ents, publishing) researched across 2008-10, and the review was conducted by Andrew Ingram of Radar Consulting. The RAB would like to thank all the research companies involved in these studies, notably Other Lines of Enquiry (who also run the RadioGauge project), Clark Chapman, Synovate, Dunnhumby and Dollywagon.

If you would like to know more about the way radio can work for your brands throughout the purchase funnel, please contact the RAB Strategy Consultant team on 020 3206 7888.



Simon Redican
Managing Director

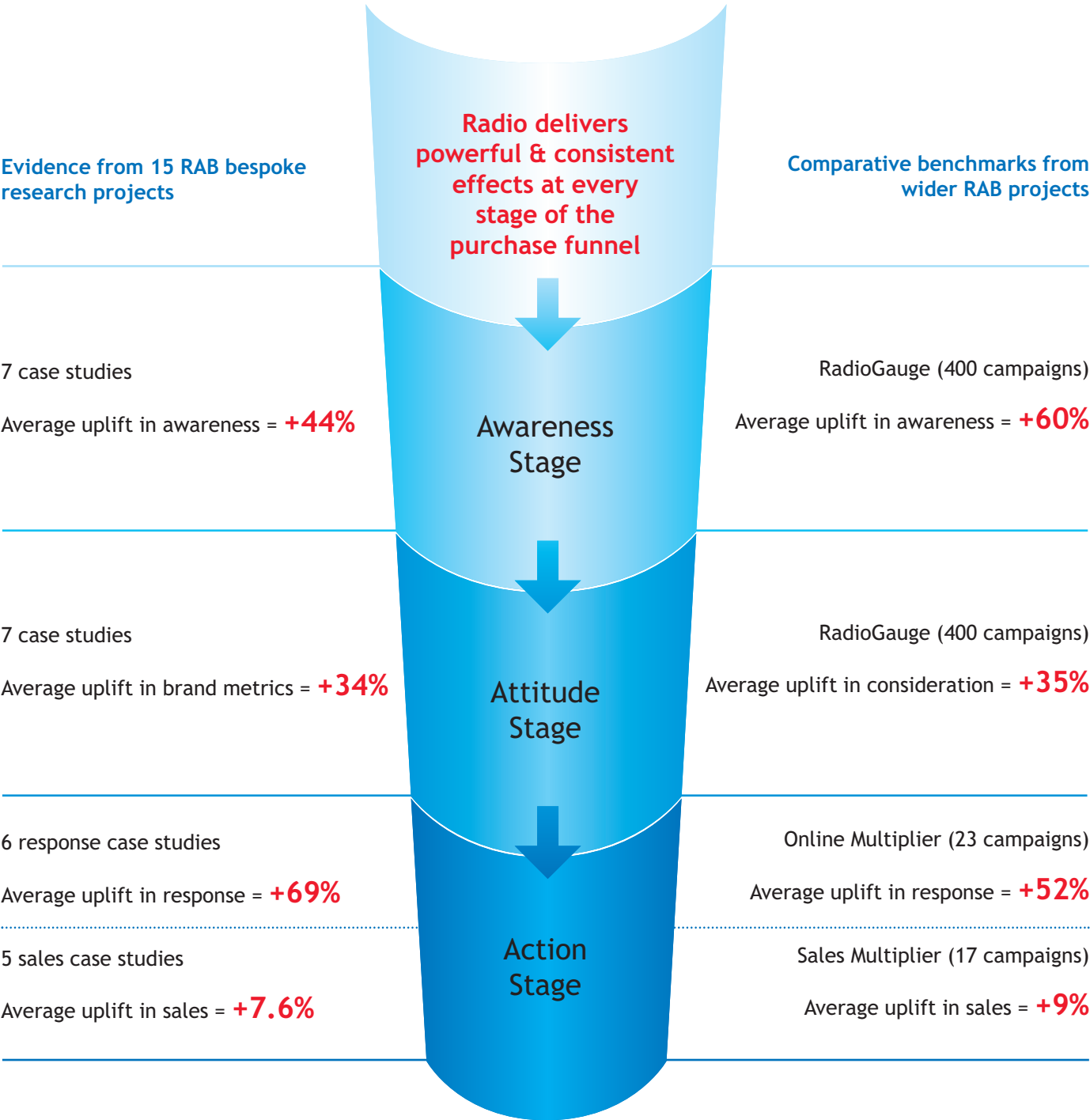


Mark Barber
Planning Director

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Summary of key findings



Executive summary

Radio can play a vital role at all stages of the purchase funnel, as the findings of these studies make clear. This is partly because of radio’s sheer reach - 65% of the UK adult population listen to commercial radio each week - but importantly it is also because of the unique way radio is consumed: as a habitual medium, it reaches continuously into people’s personal spaces in unexpected ways, and its content becomes part of the ‘*soundtrack to their lives*’.

Consumer thinking

I’ve heard of it
I recognise it
I know it

Awareness Stage

I know something
I like it
It’s relevant

Attitude Stage

I want one
Now is a good time
A reason why...

Action Stage

loop back

Notes on progress

Saliency needed
Share of voice helps
Brand name messages



Rational messages
Emotional messages
The ‘why’



Limited offer/terms
Reward offered
Why now?



The Awareness Stage: radio speaks the brand name

At the start of the funnel, a brand’s challenge is to build awareness, especially for new brands or variants. Radio is particularly good at this because it speaks the name of the brand out loud - rather than just showing it as static media do - and radio’s relatively high levels of frequency mean that the brand identity is strongly reinforced, creating saliency in competitive marketplaces.

Brands in this study using radio at the Awareness Stage: D, E, H, J, L, M, O

Evidence:
From 7 case studies:
Radio uplifts ad awareness by 44%

Benchmarked against RadioGauge (400 campaigns):
The average radio campaign raises ad awareness levels by over 60%

The Attitude Stage: radio changes people’s minds

In the second stage of the funnel the challenge is to change people’s minds - affecting their understanding of a brand. This can involve giving them new information (about product performance, offers, brand benefits etc) or it can focus more on building an emotional impression of the brand, and changing the way people feel about it. At this stage the creative treatment in the advertising becomes very important.

Again, radio’s ability to operate within people’s personal spaces offers an advantage here, particularly at the emotional level. This is also the area of the process where branded content can be most effective, changing perceptions of a brand by creating associations with the radio station’s own brand values.

Brands in this study using radio at the Attitude Stage: E, F, G, I, K, L, M

Evidence:
From 7 case studies:
Radio uplifts brand consideration by 34%

Benchmarked against RadioGauge (400 campaigns):
The average radio campaign raises brand consideration scores by over 35%

The Action Stage: radio mobilises people

The third stage of the funnel involves some kind of action or a change in behaviour. For many brands this is the most critical stage - getting customers to make a call, visit a website, visit a showroom or make a purchase - so it’s essential to have an advertising message which really makes a clear case. Radio is sometimes called the ‘*call to action medium*’ because it reaches people at the times when they are most likely to be able to take the next step - on the way to the shops, in the car, or while using the internet.

Brands in this study using radio to drive response: D, E, F, H, K, L

Brands in this study using radio to drive sales: A, B, C, J, N

Evidence:
From 6 case studies:
The average radio campaign increases online response by 69%

Benchmarked against the Online Multiplier (23 campaigns):
The average radio campaign drives a 52% increase in online response

From 5 case studies:
The average radio campaign increases fmcg sales by 7.6%

Benchmarked against the Sales Multiplier (17 campaigns):
The average radio campaign drives a 9% increase in fmcg sales

The Reinforcement Stage (loop back): radio creates long-term presence

After a customer has taken the action (made a purchase, visited a website, signed up for a service, etc) the relationship has only just begun, and the brand has an opportunity to cultivate customers further, reassuring them that they made the right decision and encouraging them to repeat the transaction. This is where radio’s cost-effectiveness can be most valuable: a constant on-air presence allows brands to make sure the value of each customer relationship is maximised over the longer term.

The purchase funnel

The *'purchase funnel'* (or the marketing funnel as it is often called) is one of those useful marketing analyses which, while constantly challenged and reinvented, has never become obsolete.

In this way it's a bit like socio-economic groupings or *'class system'* of ABC1C2DE - its demise has been announced dozens of times over the last thirty years but as an industry we keep going back to it because, for most purposes, it's a more useful tool than the replacements.

The premise for the purchase funnel is that, if people are going to transact with your brand - sign up, buy it, rent it, *'like'* it on Facebook, recommend it to their friends, whatever - they have to go through a basic process, with three core elements:

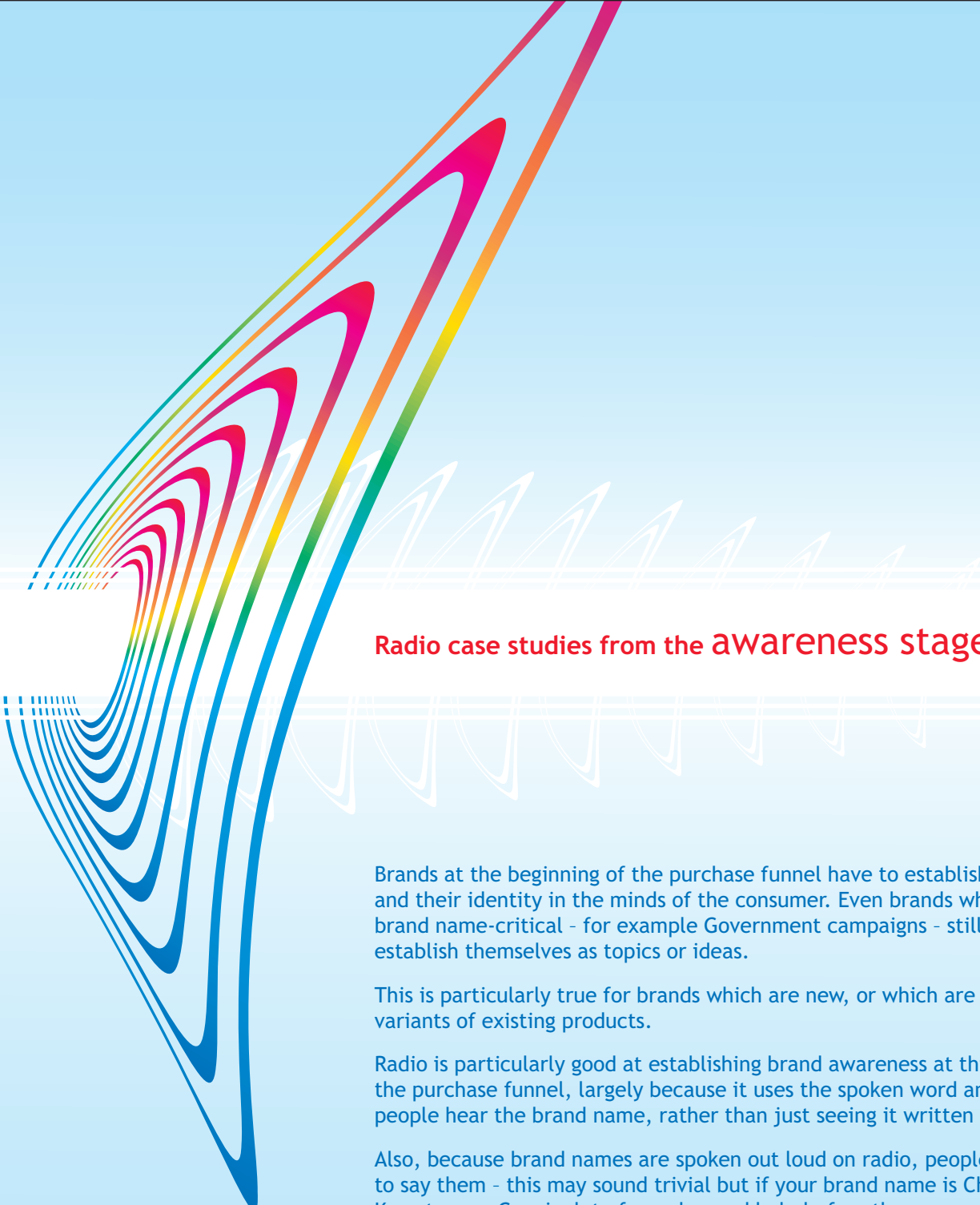
- **AWARENESS** - they have to have heard of it, be able to identify it from others
- **ATTITUDE** - they need to know or feel something about it which affects their relationship to the brand
- **ACTION** - they need to actually do something (for most commercial brands that means a purchase, but for a charity it might mean signing up, and for government campaigns it might mean changing personal behaviour).

Most business writers agree that there is also a fourth element - a kind of feedback loop where the consumer who has made a purchase starts a relationship with the brand and becomes part of a longer process.

Classically, purchases like new cars have a long and complex funnel, whereas the distress purchase of a packet of aspirin at a petrol forecourt on a wet Thursday in November is very short and simple.

It's important to realise that brands can and do operate in different parts of the funnel at the same time. A campaign aimed at getting people to visit a website will also probably be working on their understanding of the product in order to drive them to the site. But the broad logic of the funnel still remains in terms of the flow - for most brand tasks, stages one and two have to be established before stage three can be efficiently activated. This is evidenced by the multiple achievements of the campaigns featured in these case studies.

Recent thinking (see McKinsey 2009 and Forrester 2007: see notes) identifies important new factors which affect the consumer's journey - notably social networking and web research - but these still eventually join the same funnel-like process involving awareness, understanding and action. They just change the influences and the options at each stage where they play a role.



Radio case studies from the awareness stage

Brands at the beginning of the purchase funnel have to establish their name and their identity in the minds of the consumer. Even brands which are not brand name-critical - for example Government campaigns - still have to establish themselves as topics or ideas.

This is particularly true for brands which are new, or which are new variants of existing products.

Radio is particularly good at establishing brand awareness at this stage of the purchase funnel, largely because it uses the spoken word and therefore people hear the brand name, rather than just seeing it written down.

Also, because brand names are spoken out loud on radio, people learn how to say them - this may sound trivial but if your brand name is Chevrolet, Kerastase or Gucci a lot of people need help before they can confidently talk about your products.

Keeping up awareness also becomes important for brands over time: this relates to the 'loop' at the end. If an established brand appears to have 'faded away' to any extent, this has an undermining effect. For some brands this is a minor issue - for fashion or entertainment brands it can be life or death.

Core radio benefit: Radio speaks the brand name

Evidence:

From 7 case studies: Radio uplifts ad awareness by 44%

Benchmarked against RadioGauge (400 campaigns): The average radio campaign raises ad awareness levels by over 60%

Case studies using radio to establish awareness:



Brand D - radio increases web traffic

This was an 800-respondent study of differential responses between radio listeners and non-listeners, following an on-air campaign for this **premium travel** brand.

Ad awareness doubled and, importantly, resulted in a measurable action in terms of a **60% increase in claimed visits to website** amongst radio listeners compared to non-listeners.



Brand E - radio influences key behaviour change

This study used an 800-strong split-sample survey comparing the responses of listeners and non-listeners to a **public health** campaign. The research demonstrated that radio was playing a fundamental role in building awareness - listeners were **40% more likely to have noticed advertising** for the campaign. Across a range of measures listeners were also seen to have a better understanding of the health issues publicised in the campaign, and were over **40% more likely to adopt one of the recommended healthier living behaviours**.

This level of effect was maintained after a subsequent burst of activity, with the result that **listeners were over 50% more likely to sign up** to the campaign program.



Brand H - radio increases online browsing amongst 'in-market' consumers

This study measured the effect which radio advertising had on people's likelihood to visit this **automotive publisher's** website. 850 respondents were interviewed after the campaign, and **advertising awareness was found to be 68% higher** amongst listeners compared to non-listeners. In addition the browsing histories from their computers were analysed (with permission) to see whether they had visited the brand's website - compellingly, it was revealed that **website visits were 86% higher** amongst people who had been exposed to the radio campaign.



Brand J - adding radio to TV trebles brand equity measures and drives purchase

A 500-strong online survey was set up to assess the effect on radio for a newly launched **toiletry brand** in terms of awareness, attitude and brand equity. The findings revealed that **scores for awareness, consideration, claimed purchase and brand equity were almost three times higher** amongst those who had been exposed to the radio + TV, compared to those exposed to TV only.



Brand L - radio generates a threefold increase in understanding of product benefits amongst the core target

This **in-home media and entertainment** brand wanted to drive new business by giving people a better understanding of the service they offered, so a survey was set-up to determine what action people had taken following the campaign.

The survey vindicated the strategy. **Advertising awareness amongst radio listeners was 43% higher** than amongst non-listeners. Customers who had been exposed to the campaign were **41% more likely to agree strongly** that the service allowed you to watch catch-up TV programmes, or whole TV series on demand. This increased threefold amongst the core target audience for this campaign.

In addition, in terms of resulting claimed behaviour, **radio listeners were also 69% more likely to go online** and find out more about the service.



Brand M - radio gets this retailer on the shopping list for replacement car parts

A localised test was set up for this **high street retailer** of automotive and transport-related products in order to measure local radio stations' ability to drive top-of-mind awareness for the brand, and the extent to which this would trickle down into increased business.

Matching samples of listeners and non-listeners were surveyed in the test areas. **Awareness was 30% higher amongst listeners**, and there was a **23% increase in consideration amongst people who only rarely or sometimes went to the stores** in question, suggesting that the campaign was reaching out to drive new business for the brand.

In addition, in terms of resulting claimed behaviour, radio listeners were also 69% more likely to go online and find out more about the service.



Brand O - radio builds brand saliency for a new product line

This campaign used radio in addition to TV to launch a **new variant** in the very competitive and dynamic bakery market, and a three stage research study (pre, mid and post) was set up to measure how the radio added to awareness and consideration for the new brand.

Awareness was 8% higher among radio listeners than amongst those who had only been exposed to the TV campaign, despite TV's wider footprint - this rose to a **net 12% gain after the campaign**. In addition the radio listeners demonstrated better attitudinal scores for key product messages about texture and flavour of the new brand.

Radio case studies from the attitude stage

Once the brand exists in the consumer's mind, it becomes possible to adjust perceptions and create associations.

Sometimes this is very straightforward; for example a retailer might want to tell people that they have plenty of good ideas for Christmas in store, or a food brand might want to publicise its health benefits. In these cases the key element of the communication is the information itself (in the words of the old advertising proverb, "*if you have something to say, say it*").

But more often brands aren't telling people something new: they are simply finding ways to restate their core brand claims in a way which will position them more competitively or more persuasively in the mind of the consumer. For brands like these, "*it ain't what you say, it's the way that you say it*", and it's at this point that creative execution becomes very important.

Radio is a powerful medium at the Understanding stage because of four core strengths:

- It's an '*explainer*' medium, which can use the spoken word to describe benefits in simple human terms (for example the effectiveness of a cough remedy)
- It's an intimate medium which speaks to people in their personal spaces (such as the car, the kitchen or the workspace), so messages come over on an almost private, one-to-one basis
- It's a tonal medium - spoken messages have an inherent tone of voice (unlike print messages) which can be adapted to optimise the brand's positioning and create associations
- It's a real-time medium: people habitually spend a long time listening to radio, and messages can't be skipped over - this means that messaging is strongly reinforced over period of the campaign

Core radio benefit: Radio changes people's minds

Evidence:

From 7 case studies: **Radio uplifts brand consideration by 34%**

Benchmarked against RadioGauge (400 campaigns): **The average radio campaign raises brand consideration scores by over 35%**

Case studies using radio to develop attitudes:



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This level of effect was maintained after a subsequent burst of activity, with the result that **listeners were over 50% more likely to sign up to the campaign program**.



Brand F - a radio promotion doubles the number of enquiries

This was a study of the effect of a three-week promotion (900 respondents) aimed at communicating the range and flexibility of the various packages offered by this **in-home media** brand. After only three weeks of activity, listeners were far more aware than non-listeners of the range of packages offered, and **over 50% more likely to feel that the packages would offer something that was right for them**. They were also twice as likely to go the brand's website to seek out more details.



Brand G - a short-term radio promotion positively affects brand perceptions

The effectiveness of an engaging promotion on behalf of this so-called '*low interest*' **automotive services** brand was measured using web-based interviews with 800 target listeners and non-listeners, with the intention of improving perceptions of the brand. Awareness of the brand was already extremely high, but following the promotion many people changed their views about the personality of the company - **listeners were 22% more likely to feel that the brand 'cared about its customers'**.



Brand I - radio communicates tactical messages and increases uptake of offers

This **grocery retailer** was running short-term tactical product messages as well as broad brand-level messages about range and value. Online interviews were conducted with 800 listeners and non-listeners to find out the differences in response, and whether the tactical and longer term messages were all getting through. The findings demonstrated that both sets of messages were being successfully picked up by the listeners, with agreement scores on **key claims up by more than 20%**, and **claimed levels of purchase almost double** for the featured goods.



Brand K - radio increases dealership visits amongst this car brand's core audience

A survey of 500 premium car buyers was set up to measure the extent to which a radio campaign created awareness of this **car marque's 'approved used'** scheme and encouraged buyers to visit the brand's websites. Customers who were exposed to the radio campaign were significantly more likely to know of the warranty offer, and to consider the marque for their next purchase (this was **28% higher amongst listeners** than non-listeners). Claimed website visits were also higher amongst listeners than non-listeners.



Brand L - radio generates a threefold increase in understanding of product benefits amongst the core target

This **in-home media and entertainment** brand wanted to drive new business by giving people a better understanding of the service they offered, so a survey was set-up to determine what action people had taken following the campaign.

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Radio case studies from the action stage

This is the critical stage for most brands, most of the time. A campaign doesn't start to pay for itself until something happens in terms of human behaviour.

This usually means a consumer purchase of some description - buying a product in a store or online. This is where radio comes into its own, because of the way it is consumed at the same time as people are driving to the shops, or getting ready to go out, or (increasingly) going online.

This makes radio very close to the point of purchase, allowing brands to 'nudge' people by offering decisive nuggets of information (or just by being heard) when people are about to make a brand choice.

Radio is also very effective at this stage of the funnel because it is a real-time medium which can't be skipped. If the ad is thirty seconds long, it takes thirty seconds to elapse - unlike print for example, which can be glossed over as quickly as the reader wishes. Radio shares this strength with other realtime media - TV, cinema - but it is the only one which reaches so far into the point-of-purchase area.

Core radio benefit: Radio mobilises people to respond

Evidence of radio's effect on RESPONSE:

From 6 case studies: **The average radio campaign increases online response by 69%**

Benchmarked against the Online Multiplier (23 campaigns): **The average radio campaign drives a 52% increase in online response**

Evidence of radio's effect on SALES:

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Case studies using radio to drive response:



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In addition, in terms of resulting claimed behaviour, **radio listeners were also 69% more likely to go online** and find out more about the service.

Case studies using radio to drive sales:



Brand A - adding radio to TV increases both short-term and long-term ROI for a 'distress purchase' brand

Over a twelve month period two sales analyses were set up for this **non-prescription pharmaceutical** brand, with Dunnhumby using Tesco Clubcard data in test and control areas (TV alone versus TV + radio).

Across the two studies radio drove average uplifts of **4% during and 11% post campaign**, with the second test demonstrating the greatest uplifts at **5% during and 15% post campaign**. Equally as important, **radio was demonstrated to bring in significant numbers of triallists** (over 70,000 across the two campaigns), with a large proportion (over 65%) staying with the brand.



Brand B - adding radio to TV increases sales of the main brand and a new variant

This project saw the launch of new variant of a **non-prescription pharmaceutical** brand, but while the campaign was creating awareness for the new version, the key measurement was sales.

Sales were measured using Boots Advantage Card data within test and control areas across an 8 week radio campaign (pre, during and post).

Results showed that the campaign had an immediate effect on the main brand with **sales over 15% higher** in the first three weeks, whilst sales of the new variant increased in the period immediately post campaign. Increases in the number of units per customer suggest the campaign was effective at encouraging repeat purchase as well as attracting new customers.



Brand C - linking radio with TV increases sales and grows share in the cereal market

This test campaign featured a sales analysis of the effect of adding radio on a regional basis to national TV campaign for this **breakfast cereal** brand.

The study demonstrated net **uplifts in sales of 6% during and post campaign**. This led to a wider test across three regions (North West, Midlands, South) which reconfirmed radio's ability to increase sales (**up to 8% during the campaign and over 6% post**) - an additional £500k sales in total. The campaign also brought approx 130,000 new shoppers to the brand and increased share by an average of 12%.



Brand J - adding radio to TV trebles brand equity measures and drives purchase

A 500-strong online survey was set up to assess the effect on radio for a newly launched **toiletry brand** in terms of awareness, attitude and brand equity. The findings revealed that **scores for awareness, consideration, claimed purchase and brand equity were almost three times higher** amongst those who had been exposed to the radio + TV, compared to those exposed to TV only.



Brand N - radio drives category and brand growth

This **non-prescription pharmaceutical brand** wanted to measure radio's ability to drive sales in a highly competitive environment, so a test was set up within Tesco Stores and the results monitored by Dunnhumby using analysis of Clubcard data.

This is a pharmaceutical sector where Own Label is the hugely dominant player but despite this, the brand managed to secure a **2.4% increase in sales post campaign**, and a **3.7% increase for the core brand**. At the same time, it also drove sales in the total category by 3%.

Appendix

How to measure radio's effect

Effectiveness is of course the bottom line for all advertising, and there are useful lessons about effectiveness measurement in these studies.

The key split: listeners versus non-listeners

When listeners have been exposed to advertising they aren't always aware that radio was the source, and this is particularly true of brands that advertise in a themed way across different media. So the key is to split the respondents into balanced groups of listeners and non-listeners - all other media exposure being equal, any differences in awareness, understanding or behaviour can be attributed to radio.

The 'post-only' option

Because radio's effect can be detected by splitting listeners and non-listeners, there is less need for a campaign to have a pre stage. Once the campaign has run, its effect can largely be gauged from comparing the differences between listeners and non-listeners. This method is not as robust as a full pre-, mid- and post-campaign survey, but it has a far shorter turnaround time.

Data-mining

The growth of schemes like Tesco Clubcard and Boots Advantage Card means that the link between advertising and sales can be measured with far more accuracy these days: the key is, as with other samples, to draw a distinction between the advertised and non-advertised areas.

Online surveys

Online surveys offer excellent economies of scale but they are vulnerable to issues of data quality so it's essential that well established and pre-recruited survey panels are used. Online panels also allow respondents to listen to any radio commercials which are being researched.

Tracking internet behaviour

With the internet being such a critical interface for brands these days, it is now possible to analyse people's browsing histories to find out what effect advertising exposure has had on their likelihood to search for certain brands or sites (method devised by Dollywagon).

let's make WAVES

As a marketer, you want advertising that makes waves and gets you noticed for all the right reasons.

We know that radio is an incredibly influential advertising medium, but sometimes misunderstood from a creative perspective.

That's why RadioGauge, the RAB's multi award-winning radio campaign measurement tool, evaluates the influence of creative execution as well as overall effectiveness of radio within the media mix.

In 2011, we're introducing a new feature providing qualitative feedback on participating radio ads and launching an online database of radio effectiveness learning gathered from the 400+ campaigns measured to date, aimed at helping you get your creative on the right wavelength.

RadioGauge is completely free of charge to qualifying advertisers, so why not get involved and make 2011 the year that you discover the true potential of radio to make waves for your business.

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For further information, go to: www.rab.co.uk