



San Diego Traffic Update

**Reach Adults with Radio
During the Work Week**

entertainment

talk

MUSIC

sports

personalities

information

news

Introduction

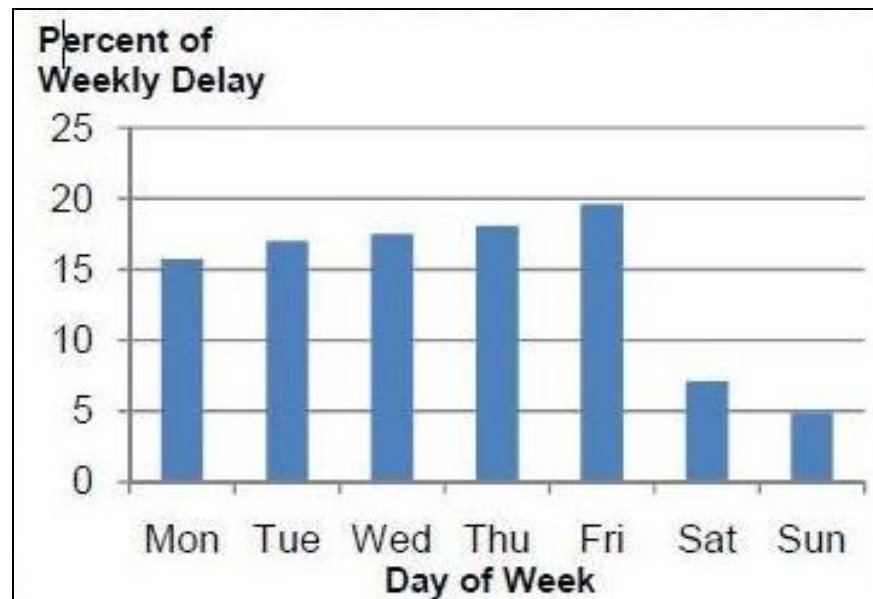
Congestion, by every measure, has increased across the country over the last 25 years in markets large and small. However, the end of the last decade saw a decline in congestion corresponding with economic conditions: fewer people on the road due to job losses and tighter family budgets. According to the Texas Traffic Institute Urban Mobility Report the delay per auto consumer – the number of hours of extra travel time - was lower by 5 hours in 2009 than 2006, but 2010 saw renewed increases. Congestion problems will increase with an improving economy.

*Though an inconvenience for commuters, traffic congestion extends the opportunity advertisers have to talk directly to potential customers about their products and services via Radio. The automobile is a **unique environment** in which to communicate. Listeners welcome Radio into their private space for **companionship, information and entertainment**. Because sound and the human voice engage consumers **emotionally**, advertisers who use Radio will reach a captive audience in a **personal, compelling and powerful way**.*

Note: Traffic congestion in San Diego appears to have dropped relative to other markets but this could be a result of major construction on the 15 corridor and a number of traffic monitors not active during the measurement period.

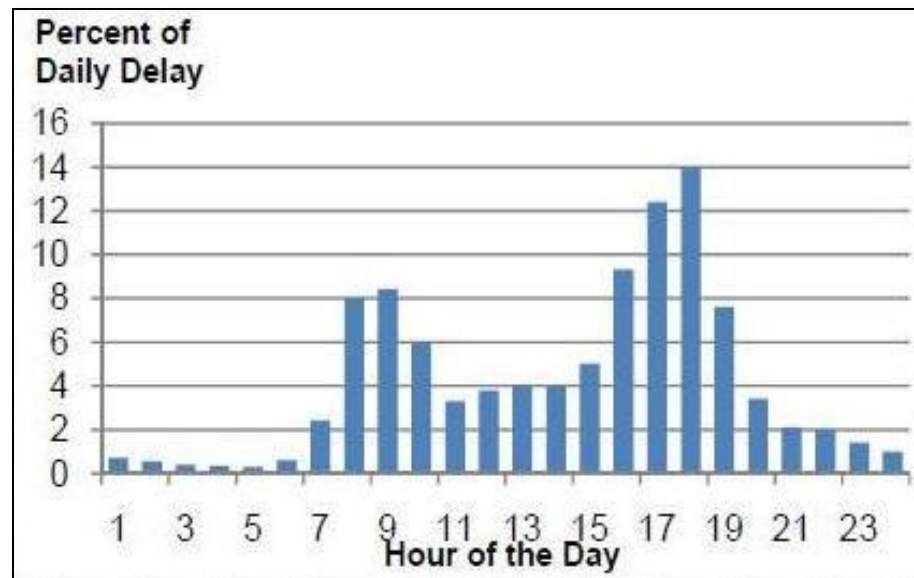
Across the Country, Traffic Builds Through the Week From Monday to Friday

Fridays are the worst days to travel. The combination of work, school, leisure and other trips mean that urban residents earn their weekend after suffering one-fifth of weekly delay.



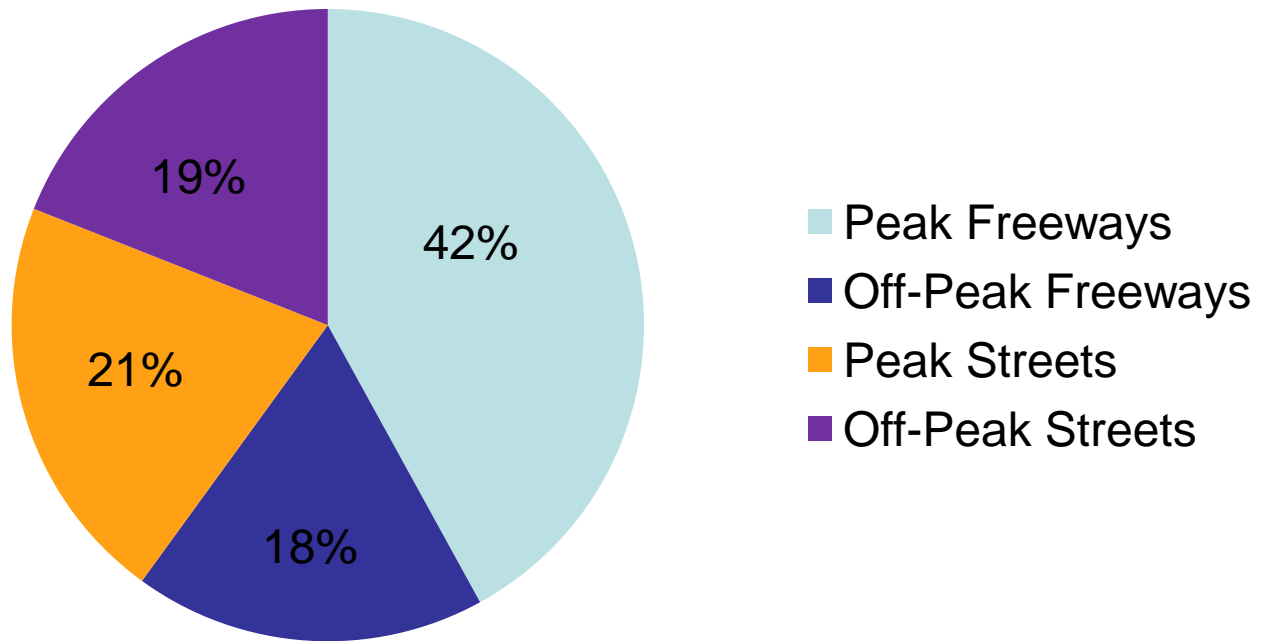
Congestion Is Worse in the Evening but it Can Be a Problem All Day

Midday hours comprise a significant share of the congestion problem. Approximately half of total delay occurs in the midday and overnight.



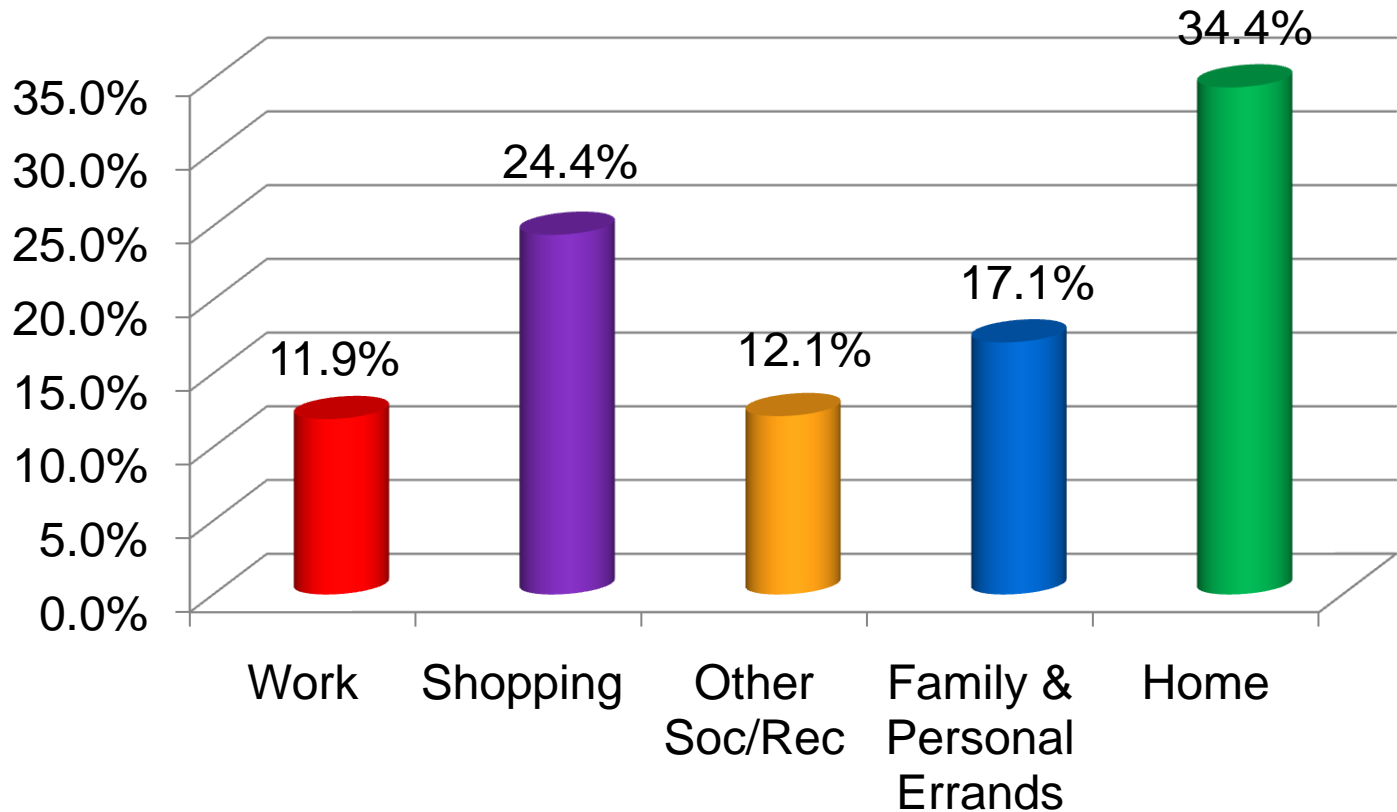
Traffic Delays Occur on Surface Streets as Well as Freeways

Percent of Delay for Road Types



Cars Aren't Just for Commuting

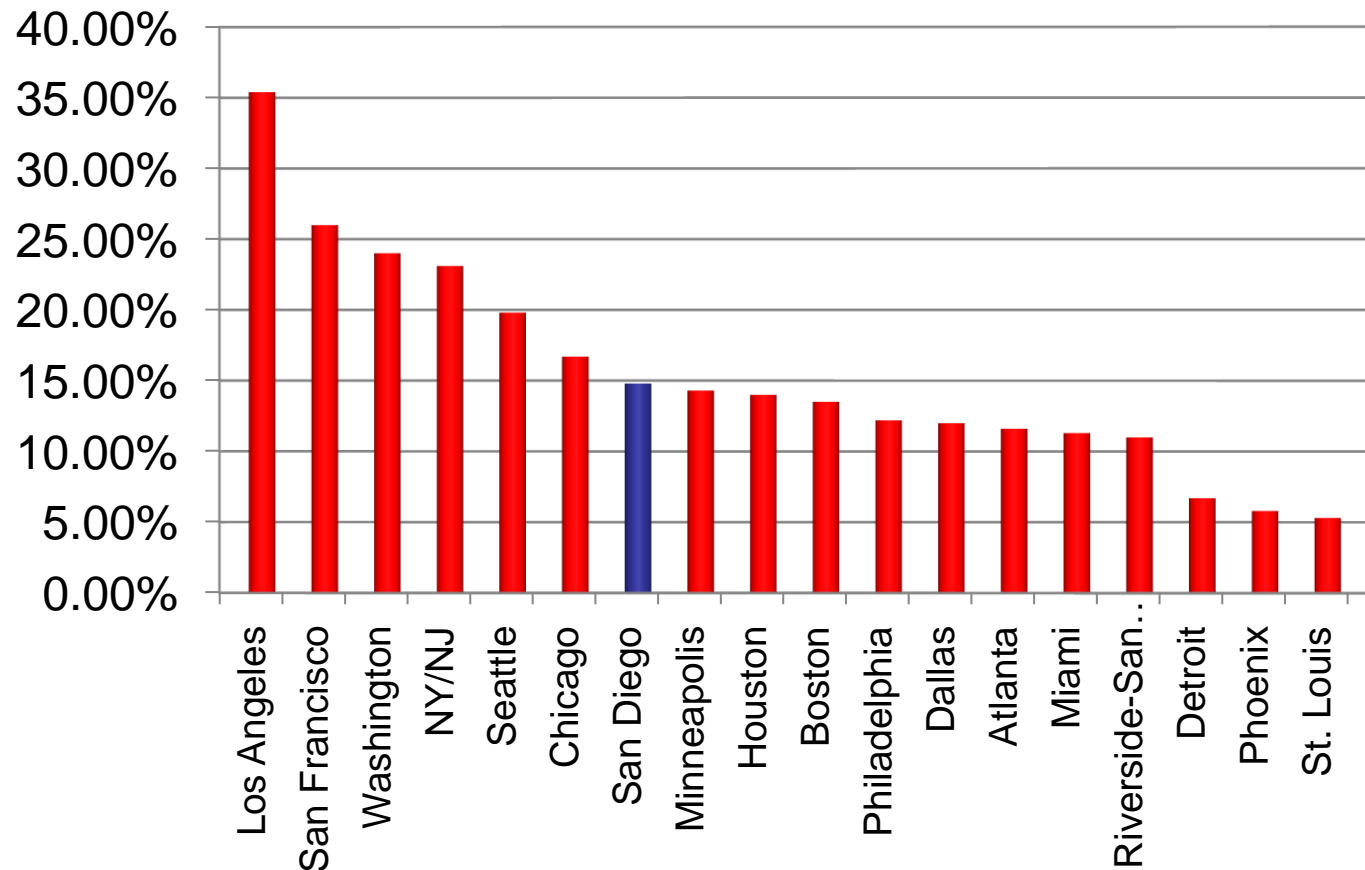
We are out of the home more and more each day, making more, often unplanned, shopping and social trips.



At Least 76.2% of Daily Trips Are Not Commuter Trips

San Diego Has the 7th Biggest Travel Time Tax* Among the Largest Cities in the Country

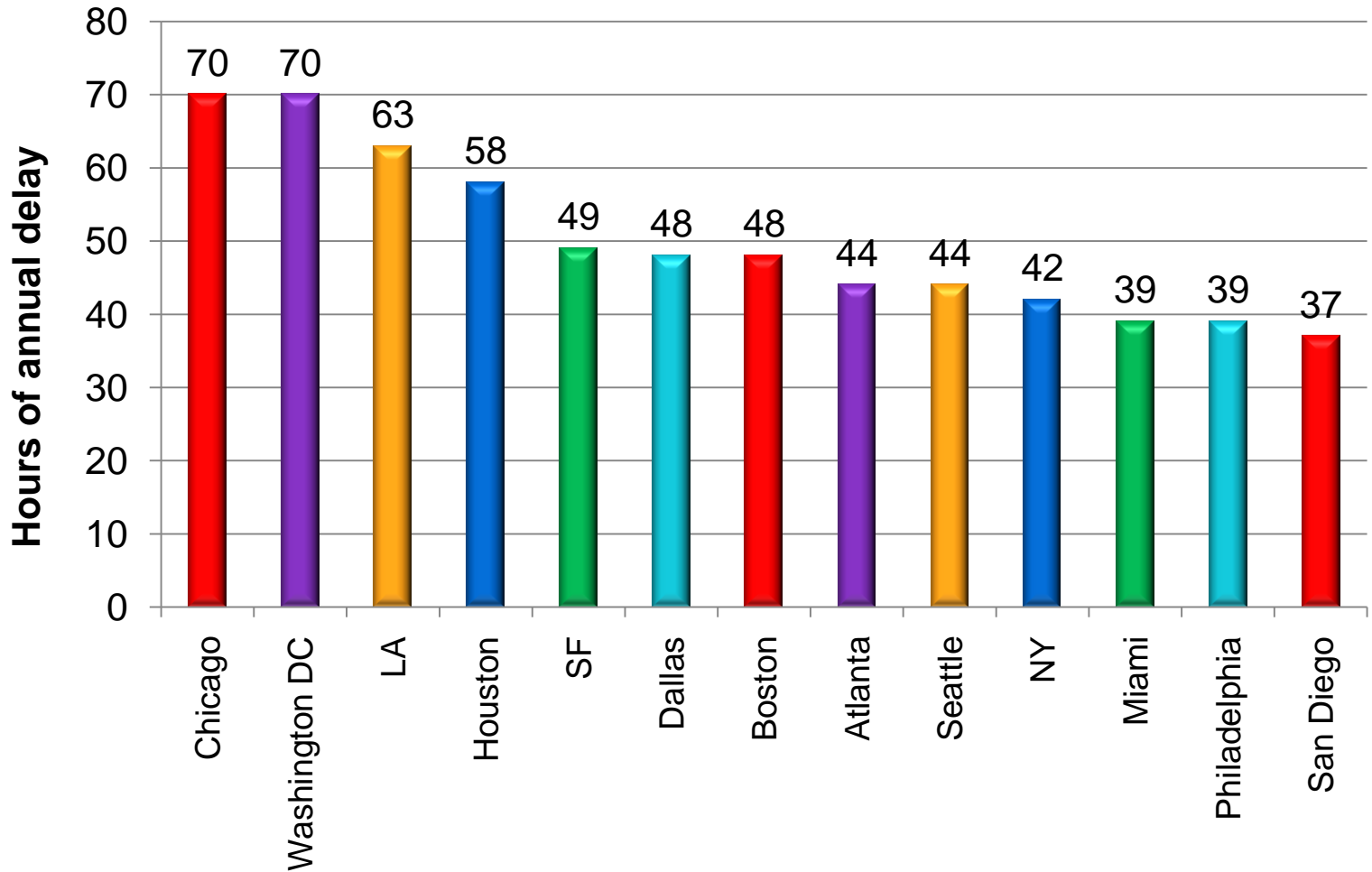
San Diego drivers spend 15% more time on the roads than under normal conditions due to traffic congestion



*Travel time tax is the percentage of extra travel time (vs. "free flow") a random trip takes in the specific region and time period analyzed.

Source: INRIX Scorecard 2010, published in March 2011 <http://inrix.com/scorecard>

San Diego Commuters Experience Traffic Delays Similar to Those in the Largest Metropolitan Areas of the U.S.



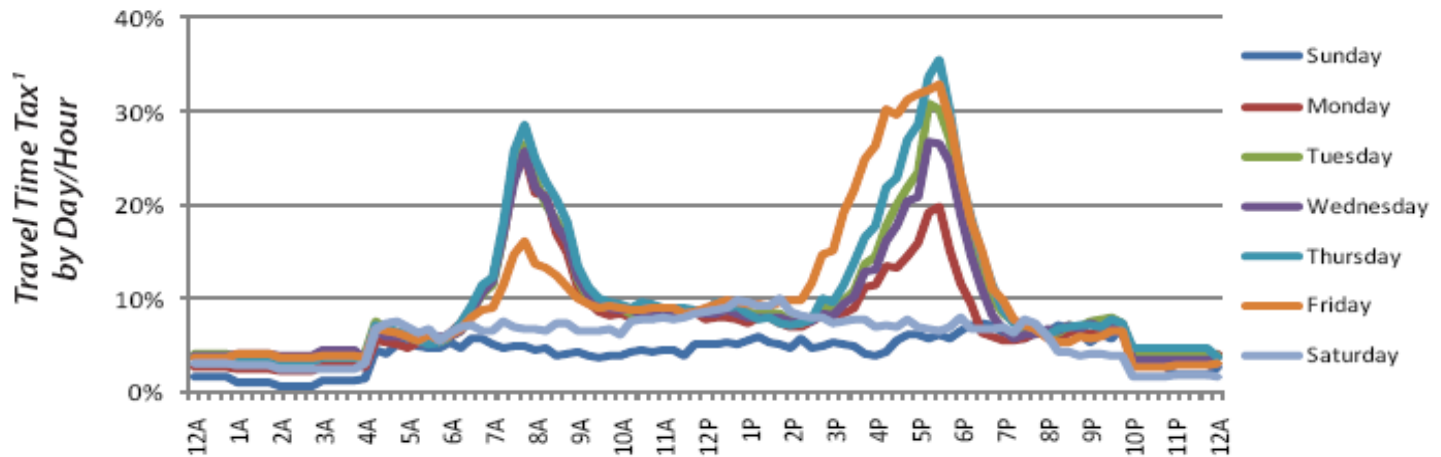
Source: Texas Traffic Institute, *2010 Urban Mobility Report*. Note: San Diego was previously ranked 9th; the drop in rank may be due to construction on the 15 as meters may have been turned off during the measurement period

San Diego's Hourly Traffic Flow Matches that of Other Cities

Most traffic and congestion are later in the day – when we “Stop and Shop”

Patterns

for 2010 Congestion in Metro Area



What Was the Worst Time? Thursday, 5:30-5:45 PM [36% Travel Time Tax¹]

Radio is the #1 most used entertainment device in a car.
 That's where you will find your potential shoppers.

Source: INRIX®, 4th Annual INRIX 2010 National Traffic Scorecard issued March 2011 San Diego Metropolitan Area. The 150-page free report is available at

<http://inrix.com/scorecard/>.

Travel Time Tax: The percentage of extra travel time (vs. free flow) a random trip takes in the specific region and time period analyzed. A 10% tax means a 10% additional trip time due to congestion.

Southern Californians Like Their Cars

- ❖ There are over **2.3 million** vehicles registered in San Diego County – that's a **14.4%** growth since 2000. *In the same period, the population increased by only 10.0%*. (DMV, August 2010 and U.S. Census)
- ❖ People in San Diego County drive over **21.6 billion miles** per year. (Texas Traffic Institute, *2010 Urban Mobility Report*)
- ❖ 35.2% of San Diego households have 3+ vehicles available, while 41.5% have 2 vehicles available. (U.S. Census 2009 *American Community Survey*)
- ❖ The majority of the population commute to work in a car, truck or van...85.7%...and 75.8% drive alone. (U.S. Census 2009 *American Community Survey*)
- ❖ The higher the household income in San Diego, the more likely individuals are to drive alone in their cars to work. **92.5%** of those commuting to work with incomes **\$50K+ drive alone**. (U.S. Census 2009 *American Community Survey*)

Crowded San Diego Roads Lead to Lots of Radio Listening

- ❖ **57.2%** of working adults in San Diego County have driven 100+ miles in the past week. **37.1%** have driven 200+ miles in the past week. (Scarborough, February 2009 – January 2010, San Diego Metro)
- ❖ **High mileage drivers** (those who drive 350+ miles per week) comprise 12.8% of the population and are almost **TWICE** as likely as the population as a whole to have household incomes of **\$75,000** per year. 26.3% of all San Diegans have household incomes of over \$75+, while **45.1%** of high mileage drivers fall in that category. (The Media Audit, July-Aug 2010/Jan-Feb 2011)
- ❖ High mileage drivers also tend to be more **well-educated** than the general population. **73.6%** of those who drive 350+ miles per week have a college or advanced degree or have attended some college compared to 57.5% of the market as a whole. (The Media Audit, Jul-Aug 2010/Jan-Feb 2011)

Affluent Working Adults Listen to Radio Away from Home

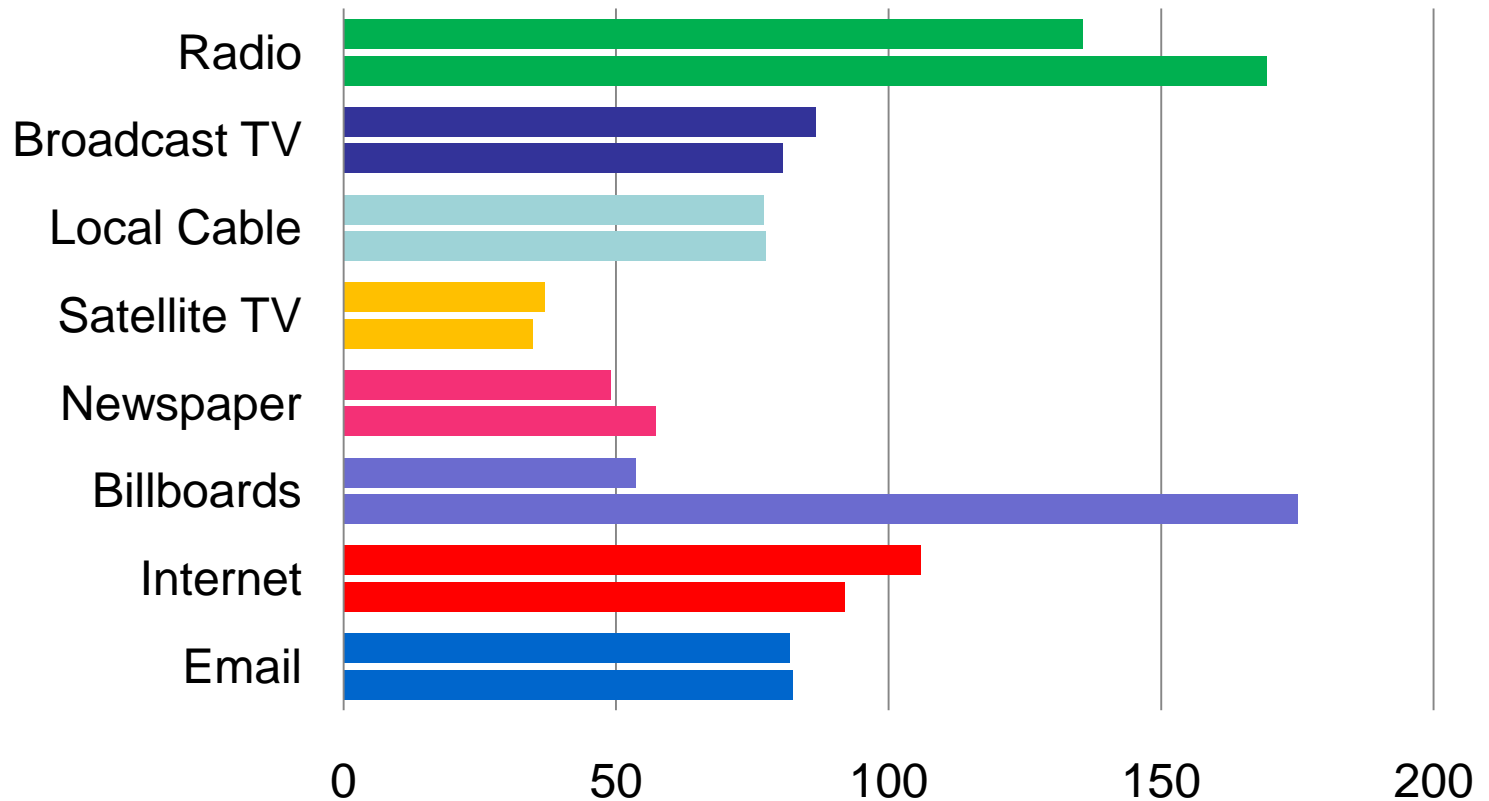
- ❖ Radio reaches **91.2%** of working Adults 25-54 in San Diego in households with **\$75K+** income each week; they spend an average of **2 hours** every day, Monday-Friday, between 5A and 1A **listening to radio out of home**. (Arbitron, Jan-May 2011, San Diego Metro)
- ❖ While 57% of the working population in San Diego leave home for work between 6:00am and 8:30am, almost **a quarter of the population leave home for work (23.3%) between 9am-midnight**. Commute time lasts all day long. (U.S. Census 2009 American Community Survey)
- ❖ **93.0%** of Persons 12+ say they use their AM/FM Radio in the car, and 74% say it is the device they use most often in their vehicles. (Bridge Ratings, Digital Audio Growth Projections, August 2007)

High Mileage Drivers in San Diego Listen to 2 Hours and 50 Minutes of Radio Each Day

Media Day Analysis, Media Exposure in Minutes

Total market (18+) – top line

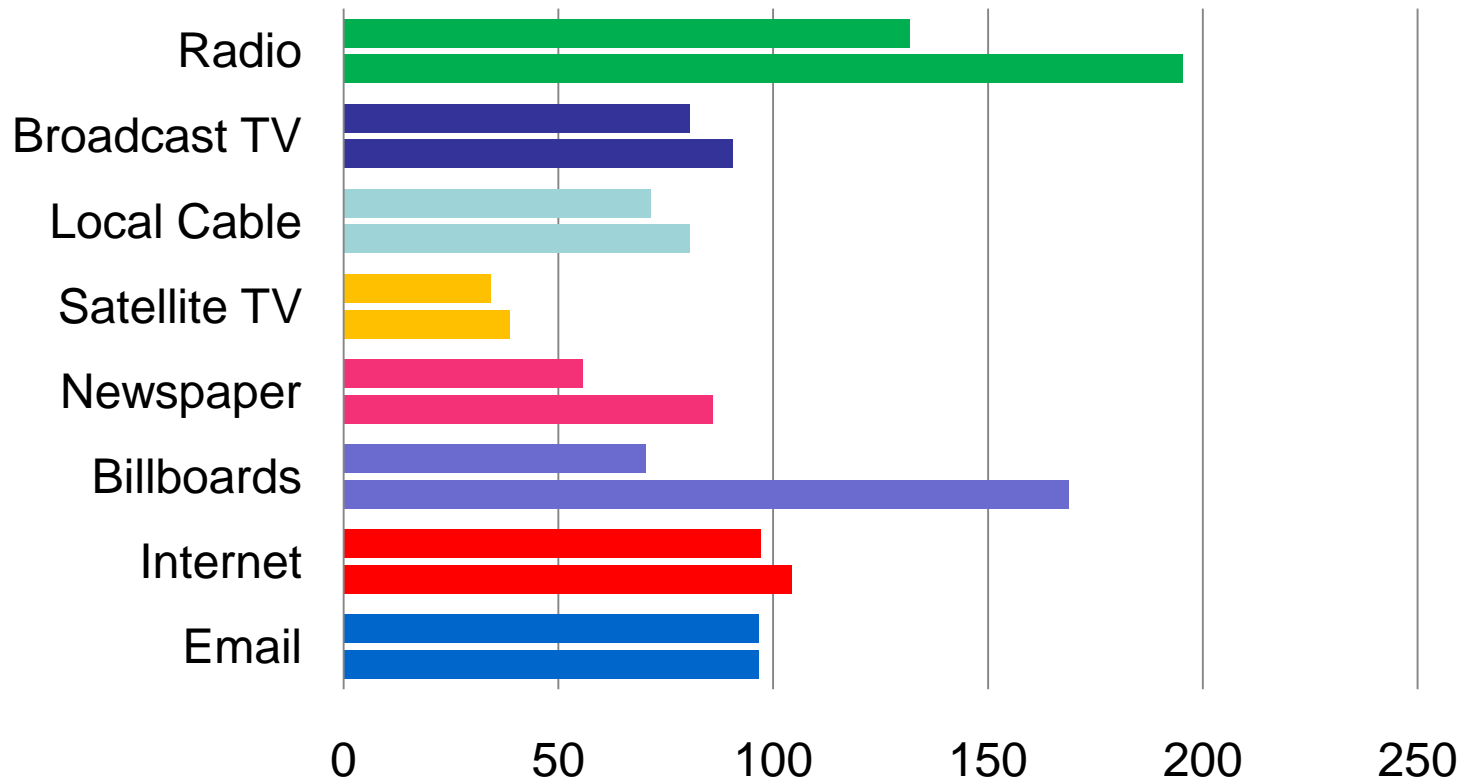
Target market (high mileage drivers) – second line



High Income (\$75K+) High Mileage Drivers in San Diego Listen to Even MORE Radio... 3 Hours and 15 Minutes Each Day

Media Day Analysis, Media Exposure in Minutes

Total market (\$75K+ income) – top line
 Target market (high mileage drivers) – bottom line



Source: The Media Audit, San Diego, Jul-Aug 2010/Jan-Feb 2011

San Diego Traffic Growth

Highway	Junction	1981	1988	1992	1996	2000	2004	2008	% Growth
I-5	L Street			127,000	131,000	149,000	161,000	157,000	23.62%
I-5	Junction 15	111,000	158,000	180,000	175,000	195,000	206,000	188,000	69.37%
I-5	Junction 163	131,000	189,000	219,000	204,000	203,000	210,000	210,000	60.31%
I-5	Sea World Drive	114,000	183,000	187,000	188,000	206,000	234,000	227,000	99.12%
I-5	Gilman	78,000	137,000	151,000	163,000	188,000	193,000	182,000	133.33%
I-5	Junction 56	107,000	200,000	215,000	216,000	254,000	265,000	288,000	169.16%
I-5	Manchester Avenue			184,000	192,000	219,000	235,000	224,000	21.74%
I-5	Poinsettia Lane			154,000	162,000	191,000	218,000	192,000	24.68%
I-5	Junction 78	85,000	137,000	152,000	171,000	202,000	209,000	197,000	131.76%
I-15	Highway 94			82,000	77,000	102,000	128,000	110,000	34.15%
I-15	Aero Drive	57,000	121,000	148,000	149,000	179,000	221,000	209,000	266.67%
I-15	Miramar/Pomerado Road			226,000	243,000	275,000	291,000	292,000	29.20%
I-15	Rancho Bernardo	45,000	119,000	149,000	174,000	201,000	219,000	217,000	382.22%
I-15	Highway 78			138,000	157,000	175,000	199,000	197,000	42.75%
163	Washington Street			93,000	94,000	97,000	97,000	126,000	35.48%
163	Mesa College Drive			160,000	166,000	168,000	180,000	177,000	10.63%
805	Telgraph Canyon Road			117,000	121,000	146,000	145,000	196,000	67.52%
805	Home Avenue			139,000	109,000	227,000	239,000	222,000	59.71%
805	Governor Drive			163,000	171,000	183,000	207,000	198,000	21.47%
805	Highway 5			110,000	107,000	125,000	146,000	147,000	33.64%


 Radio
 BROADCASTERS
 ASSOCIATION

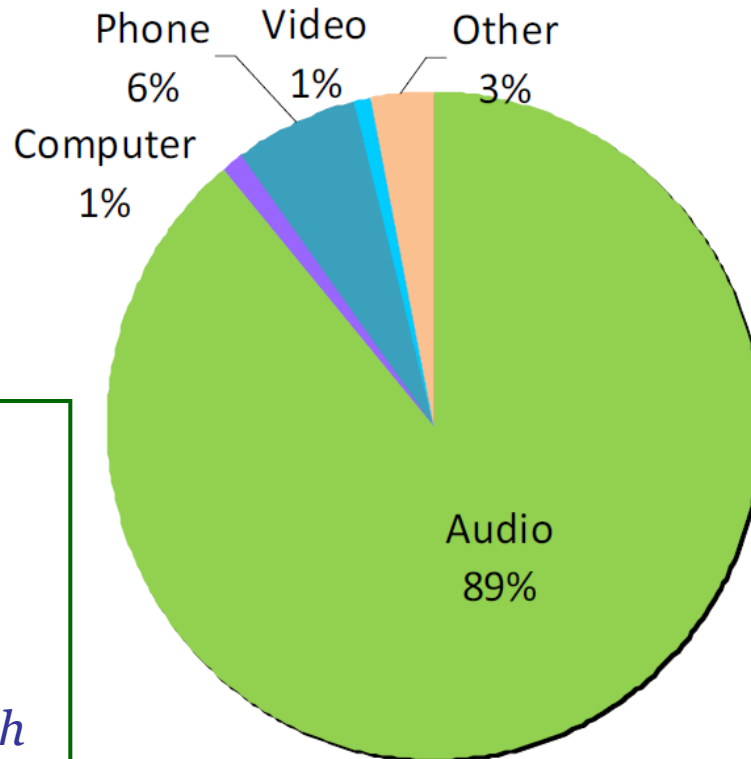
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San Diego Traffic Growth (cont.)

Highway	Junction	1981	1988	1992	1996	2000	2004	2008	% Growth
I-8	Hotel Circle	135,000	181,000	188,000	186,000	211,000	223,000	208,000	54.07%
I-8	Waring Road	165,000	238,000	242,000	235,000	244,000	253,000	236,000	43.03%
I-8	El Cajon Blvd.	146,000	195,000	136,000	157,000	162,000	181,000	244,000	67.12%
I-8	Johnson Avenue			163,000	166,000	186,000	193,000	197,000	20.86%
52	Regents Road	38,000	65,000	85,000	85,000	90,000	96,000	84,000	121.05%
52	Santo Road			14,600	50,000	64,000	92,000	80,000	447.95%
52	Junction 125						64,000	61,000	-4.69%
78	Emerald Drive			94,000	92,000	116,000	141,000	131,000	39.36%
78	Twin Oaks Valley Road			107,000	117,000	135,000	155,000	157,000	46.73%
I-94	Federal Blvd.	96,000	151,000	156,000	150,000	169,000	178,000	160,000	66.67%
I-94	Sweetwater Springs Blvd			51,000	59,000	59,000	62,000	68,000	33.33%

Inside the Car, Audio Is the Dominant Medium

Share of Media Time in the Automobile (Adults 18+)



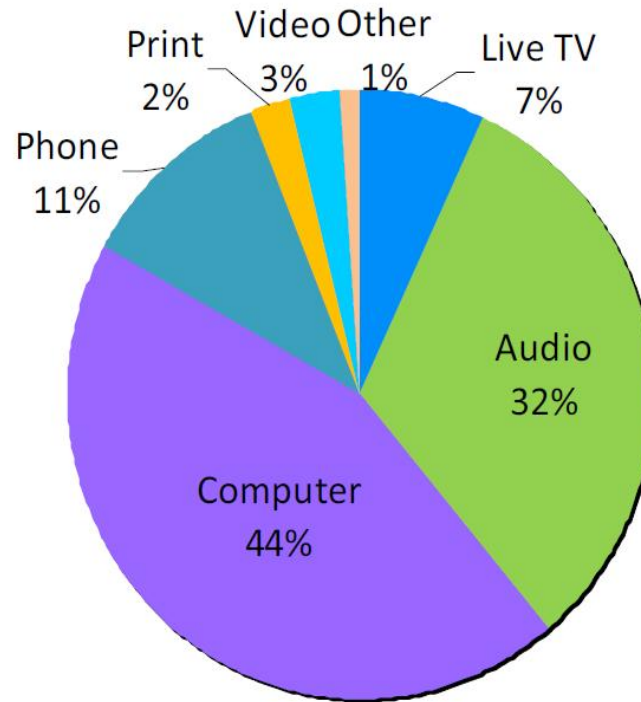
Think about it.
They are in the car,
heading for a place to
shop.
*When did your last
message resonate with
the consumer?*

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In the Workplace, Audio and Computer Rule

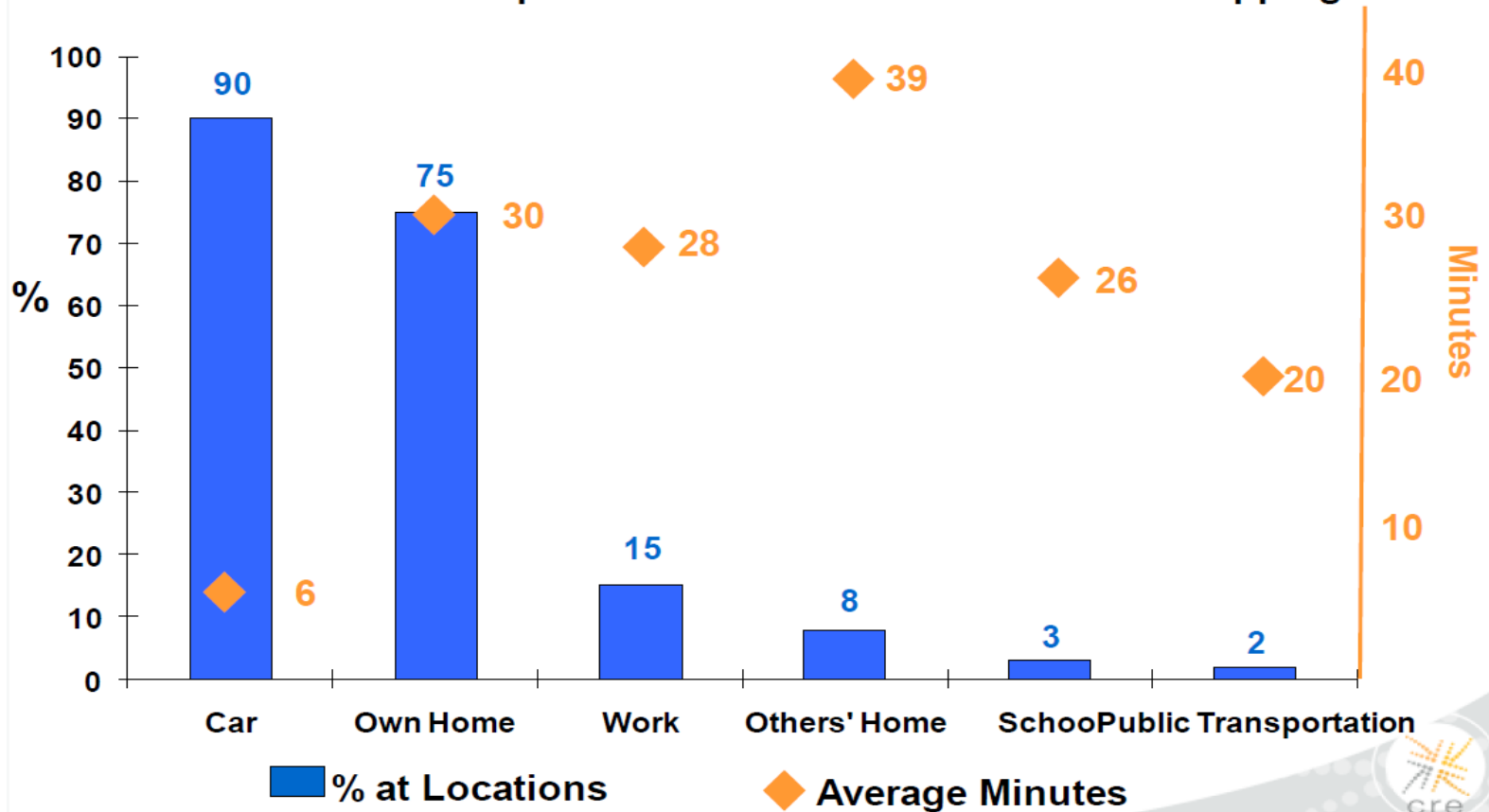
Share of Media Time at Work (Adults 18+)



Think about it.
They are heading for
the car to shop.
*When did your last
message resonate with
the consumer?*

90% of People Are in Cars Less Than 6 Minutes Before Shopping

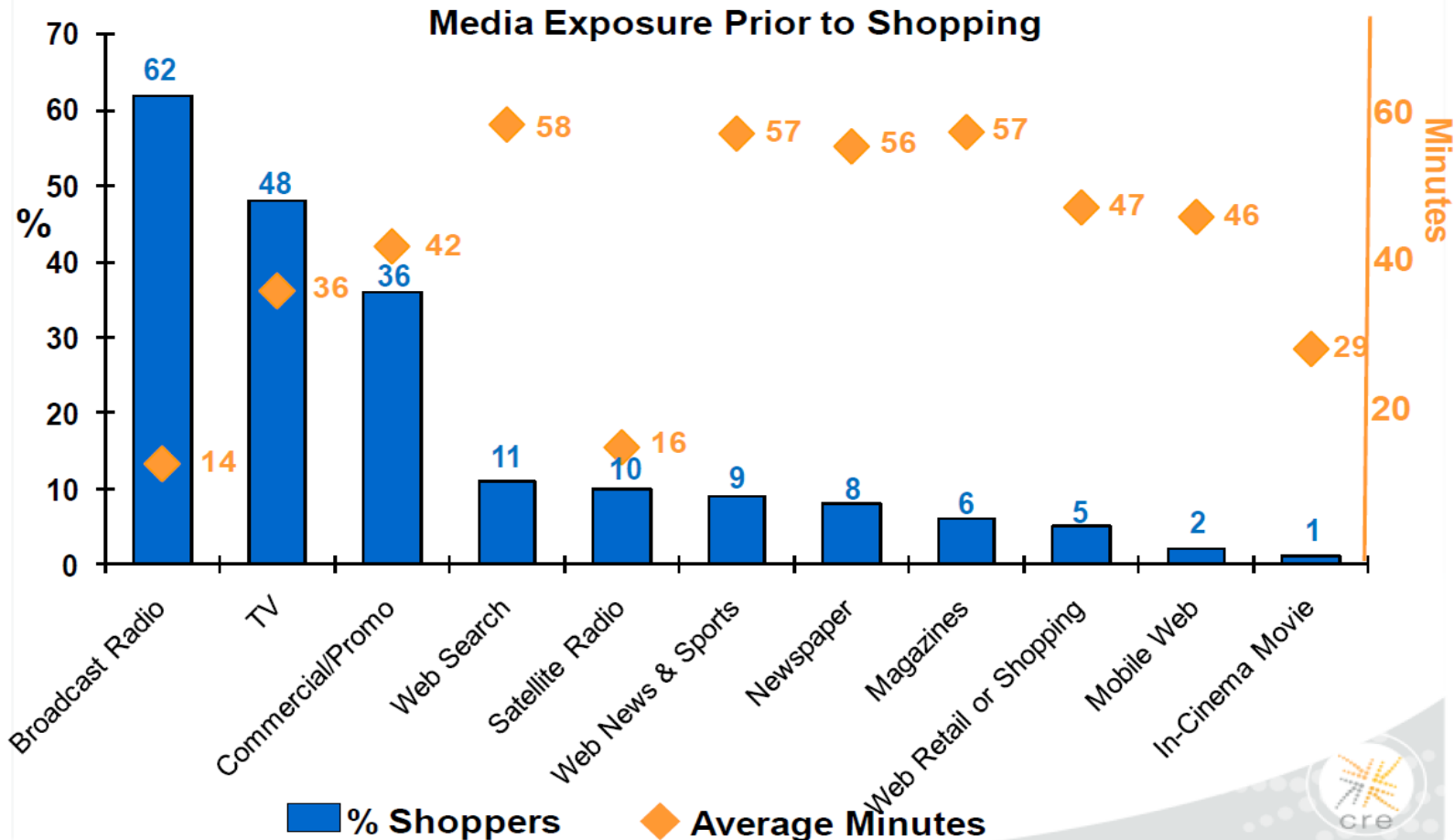
% of Adults in a Specific Location within 2 Hours of Shopping



Note: Additional shopping within 30 minutes of the initial target event were considered part of the same shopping

© The Nielsen Company

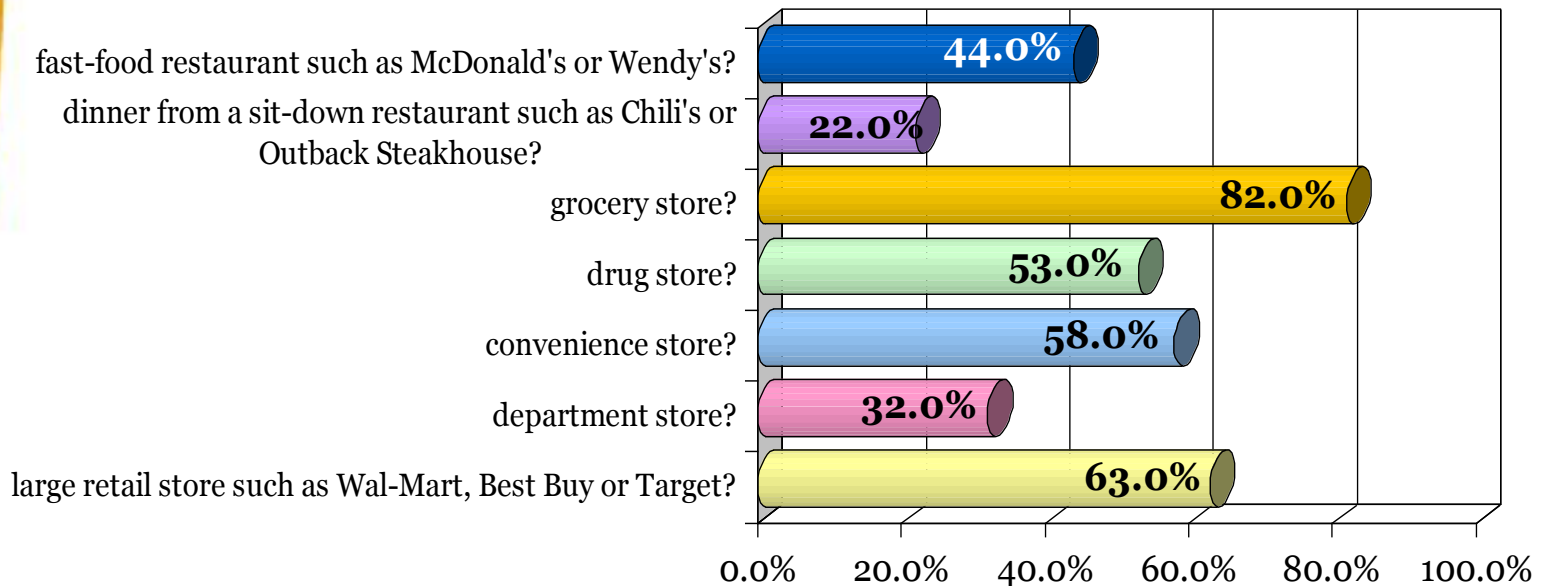
Over 60% of Shoppers Listened to Radio 14 Minutes Prior to Shopping



Get the message there when it is likely to help produce a sale.

Where Consumers Stop on Their Way Home from Work

In the Past Month have you stopped on your way home from work to pick up dinner from a /go to a...



Base: United States residents aged 18 or older who travel to work and notice the advertising messages on roadside billboards each time, most of the time or sometimes.

“The Right Place at the Right Time”

- **74%** of working women leave work without knowing what’s for dinner.
- **72%** of drivers frequently or sometimes shop on their way home from work.
- **90%** of decisions about where to stop on the way home and what to buy (for anything, not just food) are made that day – before stopping.
- **68%** of drivers frequently or sometimes make their shopping decisions *while in the car*.
- **38%** make the decision to stop at the store *while* on their way home.
- Nearly *all working people* in *San Diego* listen to the radio during the day and/or in their cars on the way home each week.

Radio can get your message across when the timing is right – just before people decide what to buy or where to shop.

Radio Reaches People Who Are Listening Live, in Real Time

- The way we shop has changed since 2000.
- **62%** of shopping trips are quick trips – decided on and made that day
- **25%** are fill-in trips – decided on and made that day
- Only **13%** of trips are classic stock-up – planned for
- The average American spends **20 minutes** each *weekday* shopping.
- Women spend on average **30 minutes** each *weekday* shopping.
- **70%** of all category-level purchase decisions are made before entering the store.

When it comes to reaching working people who are on their way to shop, nothing tops Radio.

Conclusion

According to the *2010 Urban Mobility Report* from the Texas Traffic Institute, traffic congestion is getting worse in many ways:

- ❖ *In all 439 urban areas, the worst congestion levels affected only 1 in 9 trips in 1982, but almost 1 in 4 trips in 2009*
- ❖ *Trips take longer*
- ❖ *Congestion affects more of the day*
- ❖ *Congestion affects weekend travel and rural areas*
- ❖ *It affects more personal trips and freight shipments*
- ❖ *Trip travel times are unreliable*

Radio is the best way to reach adults during the work week!