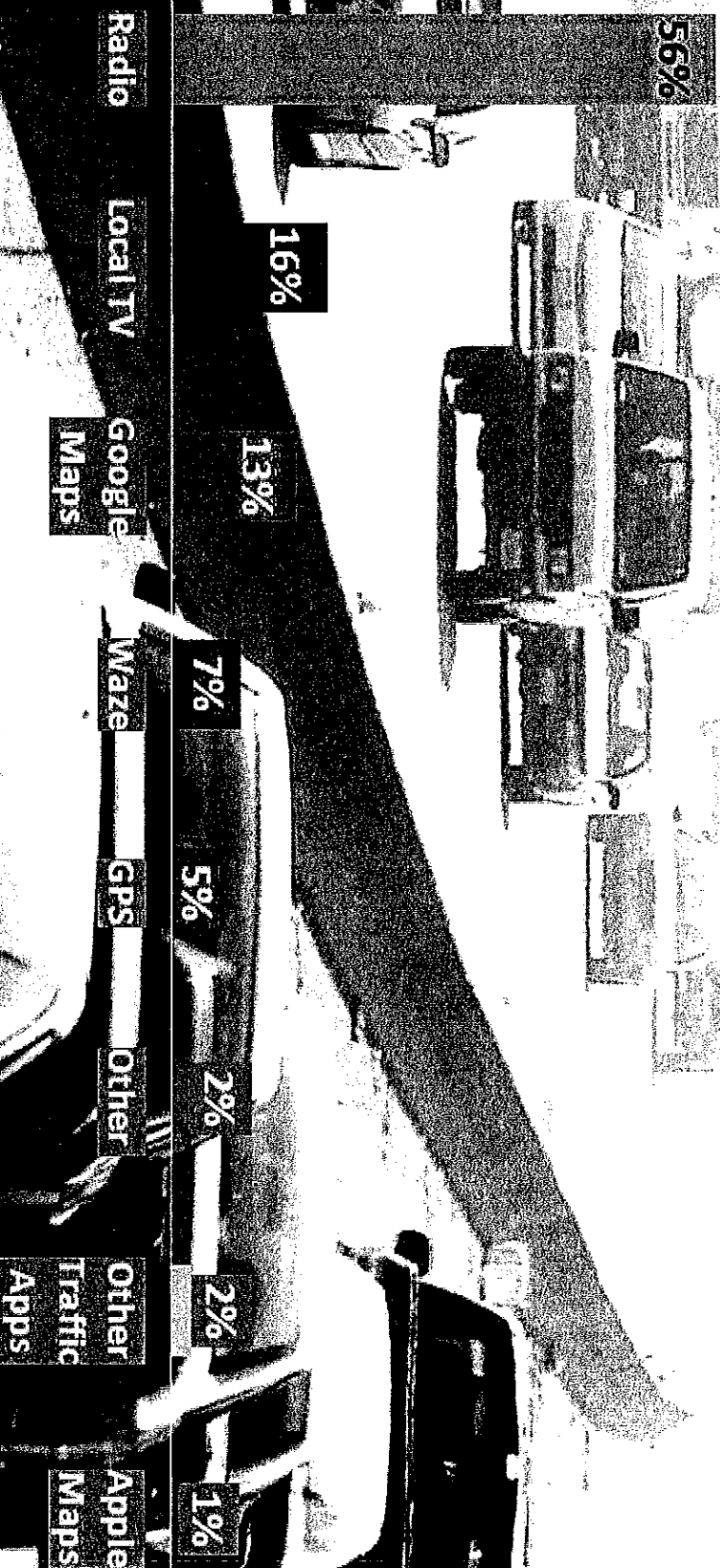


TOP SOURCE FOR TRAFFIC

Among those using traffic information

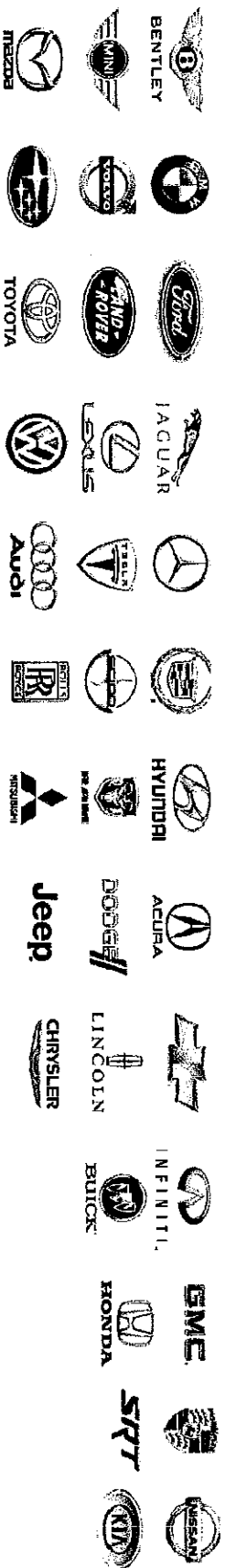


Source: Jacobs TechSurvey 12, 2015

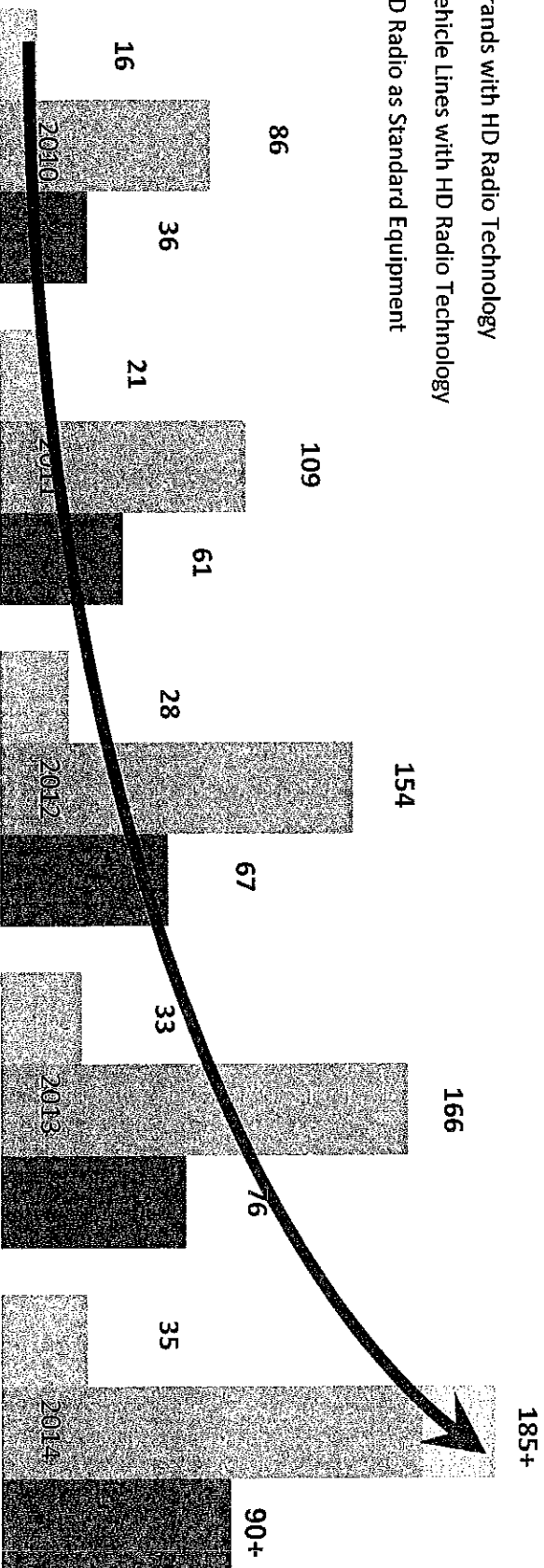
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THE BATTLE FOR THE DASH

All major auto brands offered factory-installed HD Radio Technology as of 2014



- Brands with HD Radio Technology
- Vehicle Lines with HD Radio Technology
- HD Radio as Standard Equipment



Source: iBiquity

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RADIO ACROSS PLATFORMS AND DEVICES

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LISTENERS TAKE THEIR AUDIO ON THE GO

- **On-demand** content delivering sports, music, information and entertainment downloads **whenever and wherever** the listener wants it
- **87%** of smartphone owners **ages 18-29** have **listened to an online radio** or music service on their phone.¹

Source: 1) Pew Research Center, January 2016
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TECHNOLOGY DELIVERS RADIO BEYOND THE DIAL

Expanding Radio's
delivery platforms to
create an interactive,
**engaging and
highly communicative**
environment
via devices and apps

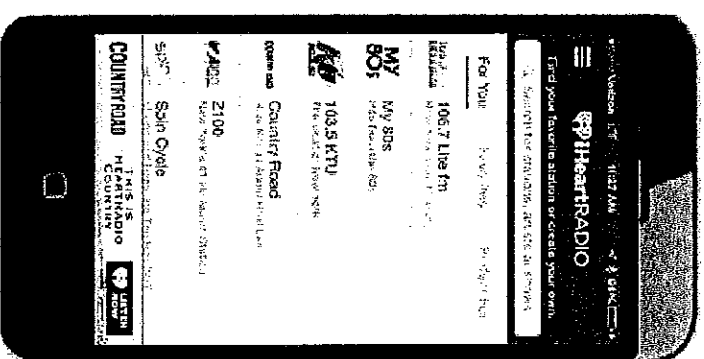
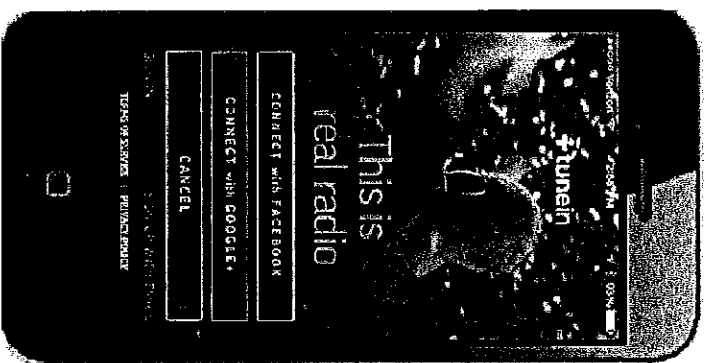


Image Source: Tune-In and iHeartRadio

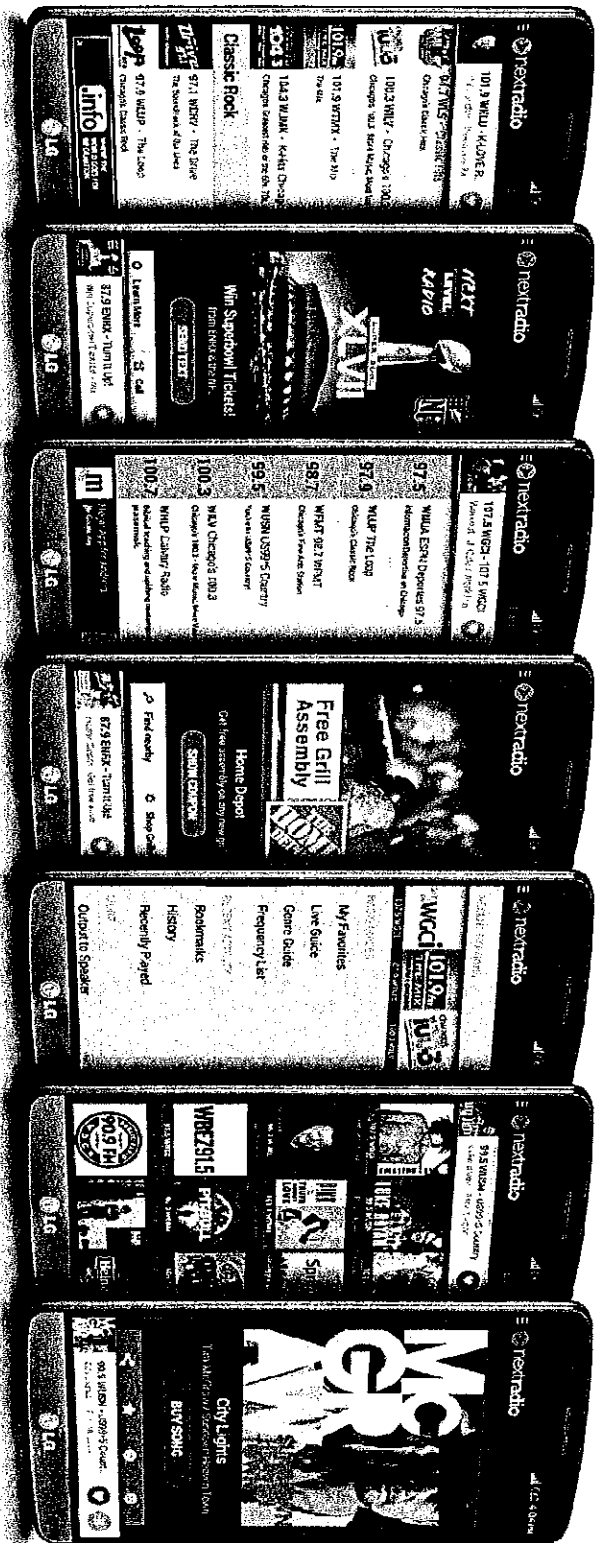
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nextradio®



As of January 2017:

- **Over 10.5 million** app downloads
- **Nearly 16,000 FM** radio stations tuned to from the app
- **Over 26 million** hours of listening through NextRadio
- **And 4/5** in Google Play Store user rating

Source: NextRadio + TagStation Insights – For additional updates : <http://tagstation.com/news/insights/>
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DELIVERS RELEVANT INTERACTIVITY



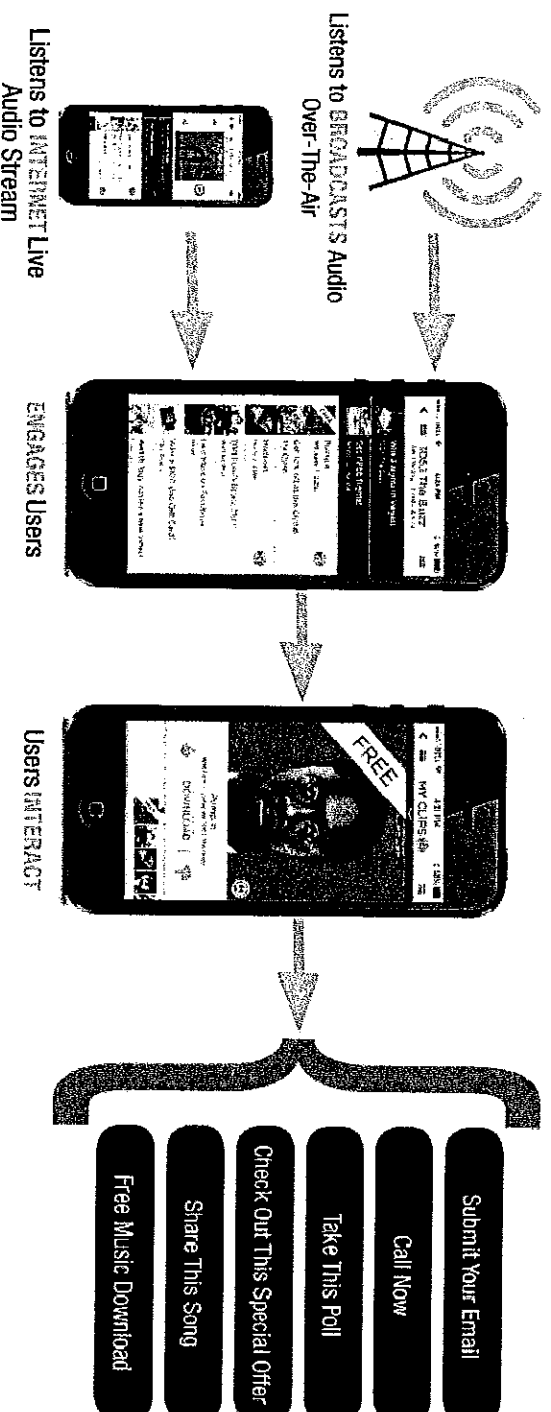
- “Content cards” provide information and highly relevant interactive tools:
- Click to buy (song or other related content)
 - Upcoming concerts and album releases for artist currently playing
 - Recent station playlist

Source: NextRadio + TagStation Insights – For additional updates : <http://tagstation.com/news/insights/>
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MORE TECHNOLOGY THAT CONVERTS LISTENING TO ENGAGEMENT



Technology converts radio listening into an engaging user experience,
empowering listeners to see what they hear and take action.

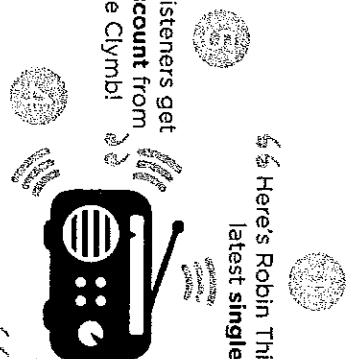
Image Source: Clip Interactive

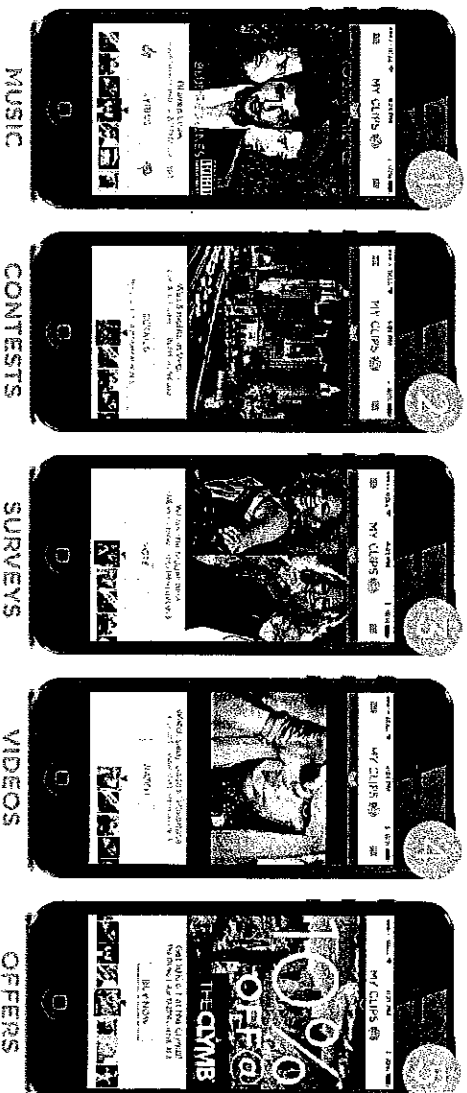
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PULLING DIGITAL CONTENT ONTO DEVICES

- 
- Here's Robin Thicke's latest single!
 - Our listeners get a discount from the Clymbi!
 - You've got to watch Lady Gaga's video.
 - Take our morning show poll!
 - You could win a trip to Vegas!



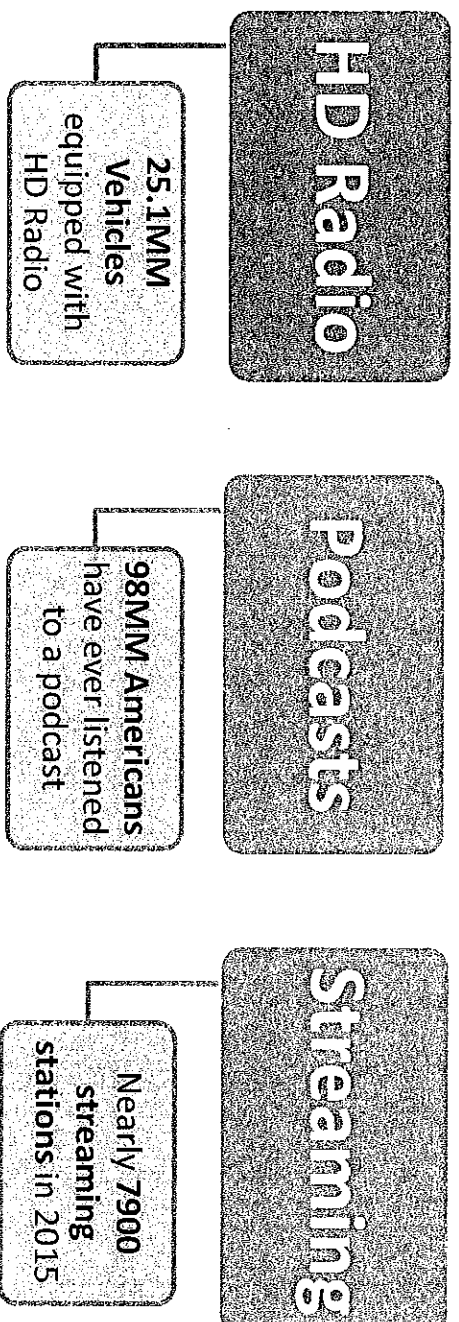
[Click here to view Clip Interactive case studies](#)

Image Source: Clip Interactive
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RADIO'S DIGITAL PLATFORMS ARE STEADILY GROWING

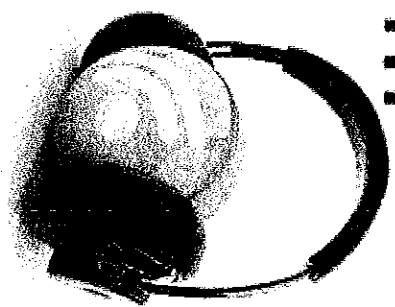


Source: HD Radio stat from iBiquity/HD Radio, 2016; The Infinite Dial 2016 – Edison Research / Triton Digital; Inside Radio / M Street Corp., December 2016; No Canadian or Mexican stations are included
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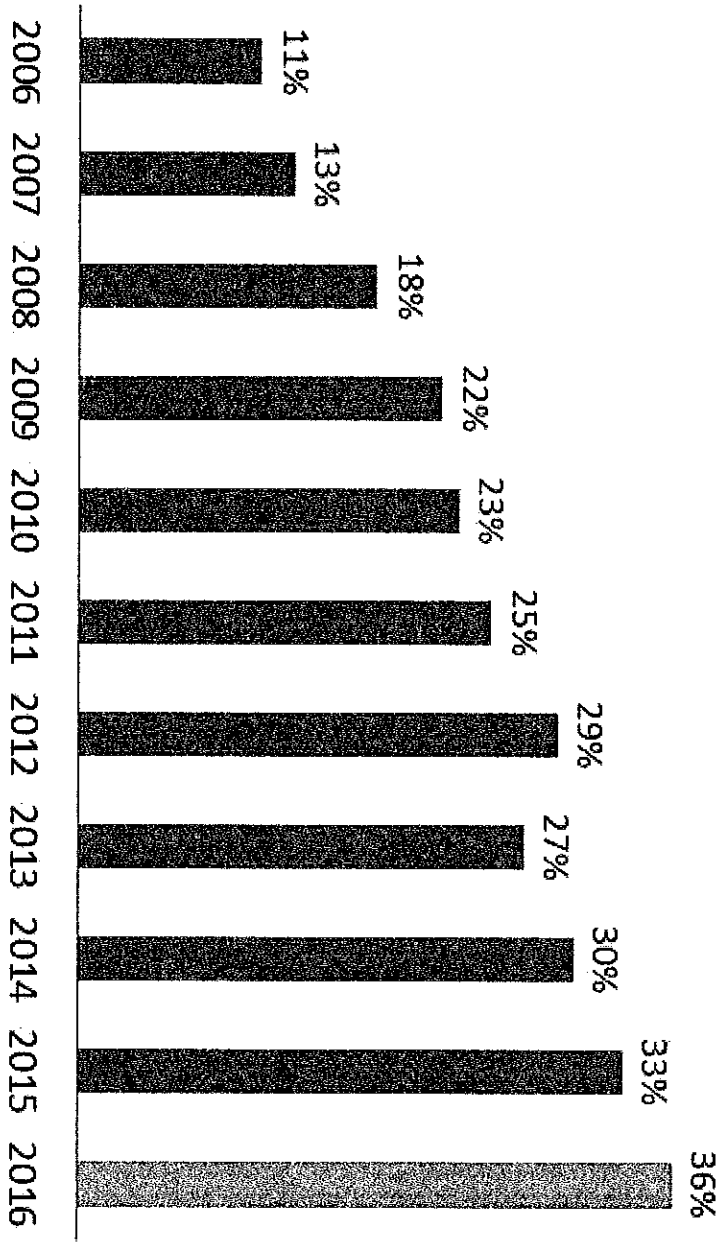
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PODCAST CONSUMPTION GROWTH



% ever listened to a podcast



Base: U.S. Population 12+

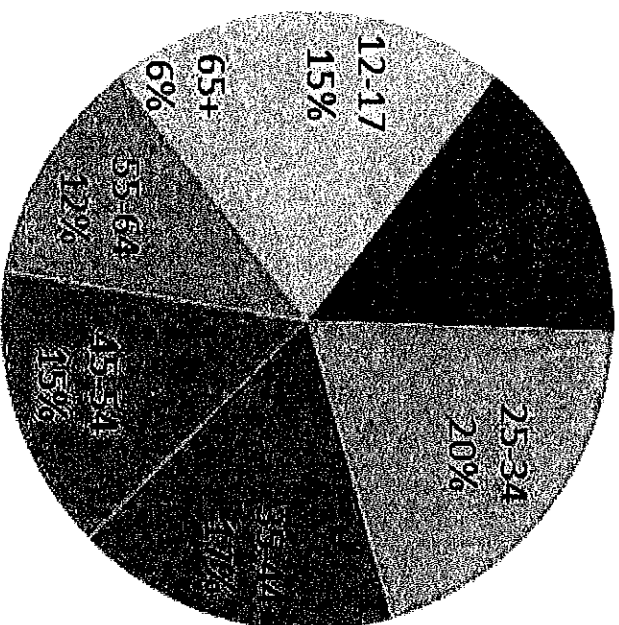
Source: The Infinite Dial 2016 - Edison Research / Triton Digital
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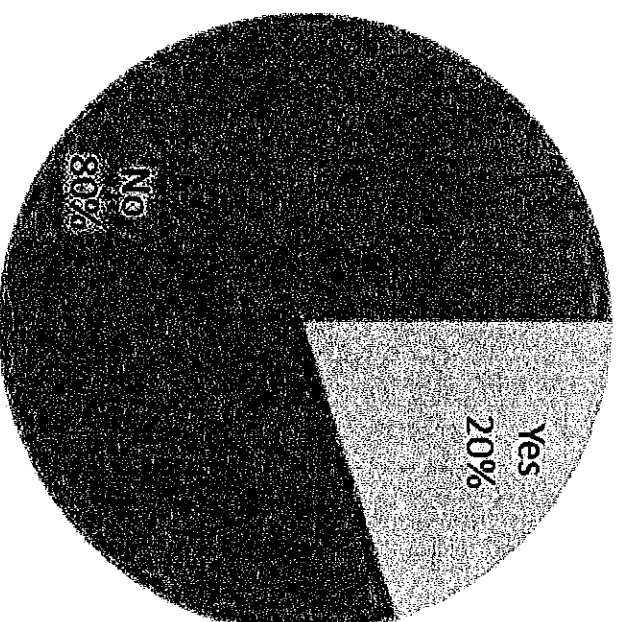


PODCAST LISTENER PROFILE

Age Composition



2x More Likely to Listen to Online Radio Vs. U.S. Population



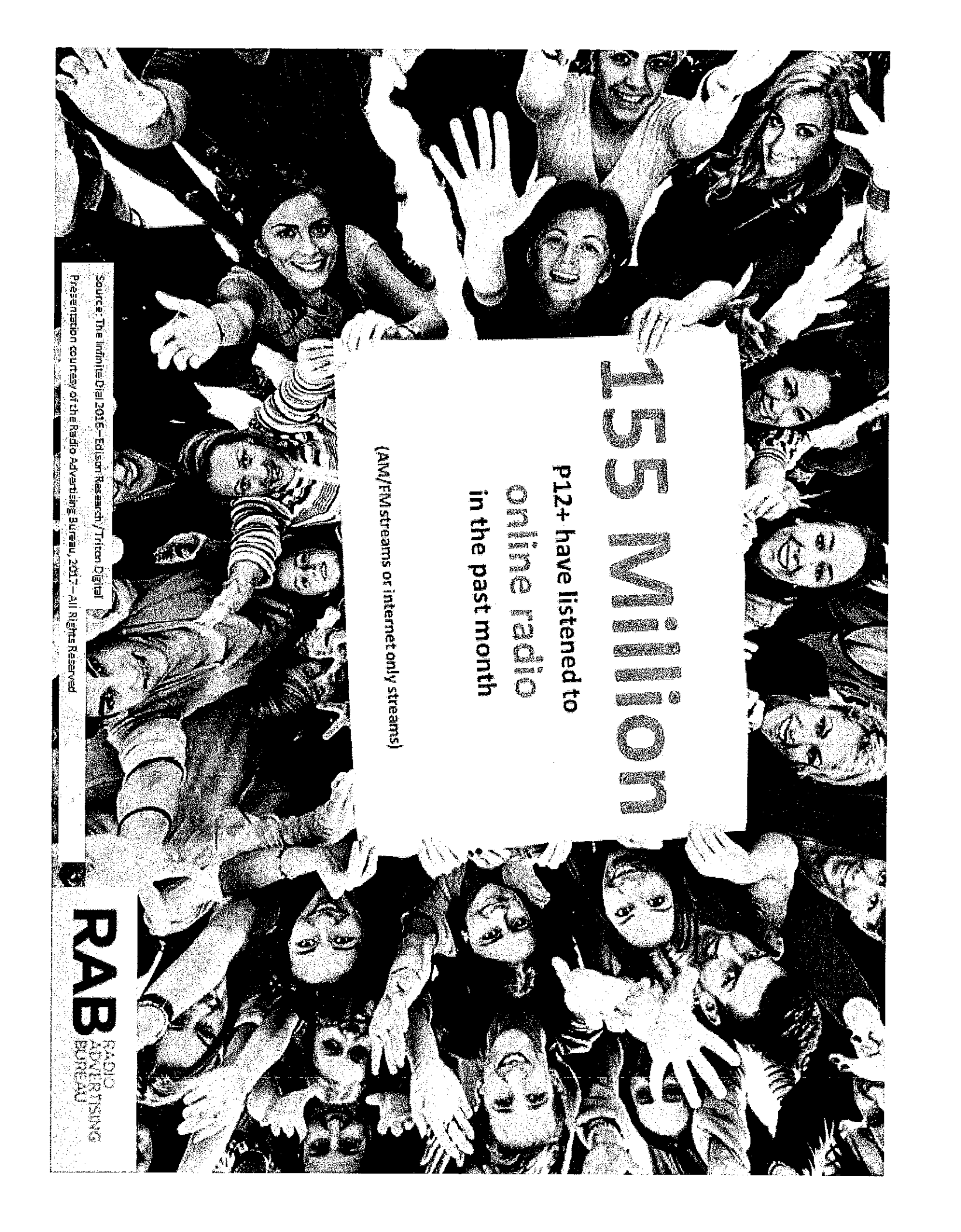
U.S. Population Listening to Online Radio = 11%
% Listening to Online Radio Past Week*

*Online Radio defined as AM/FM Streams & Internet-Only

Source: The Infinite Dial 2015 - Edison Research / Triton Digital
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155 Million
P12+ have listened to
online radio
in the past month

(AM/FM streams or internet only streams)

Source: The Infinite Dial 2016—Edison Research / Triton Digital
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ONLINE RADIO LISTENING COMPLEMENTS BROADCAST RADIO



Source: The Infinite Dial 2003 - Arbitron / Edison Research.
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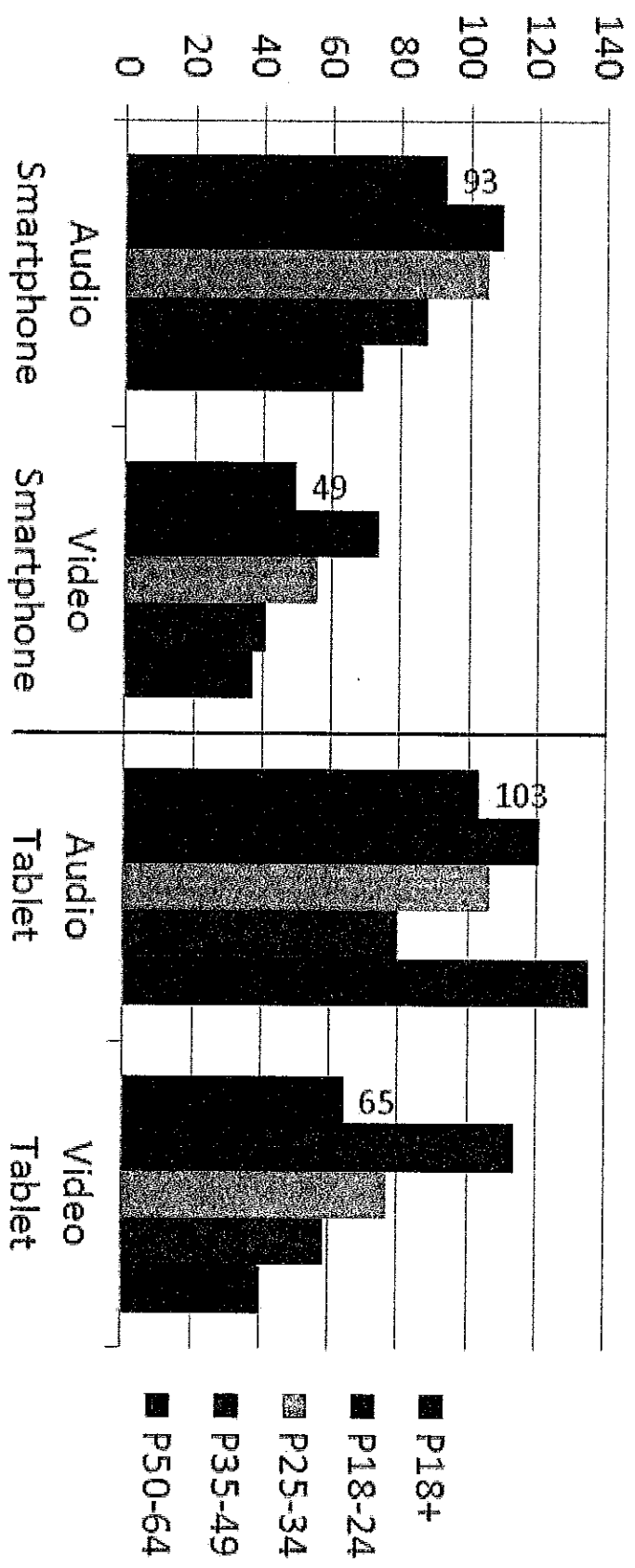
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AUDIO GETS MORE MINUTES PER STREAMER

Audio streamers spend more time listening than viewers do watching video

Average Week Usage Minutes Per User



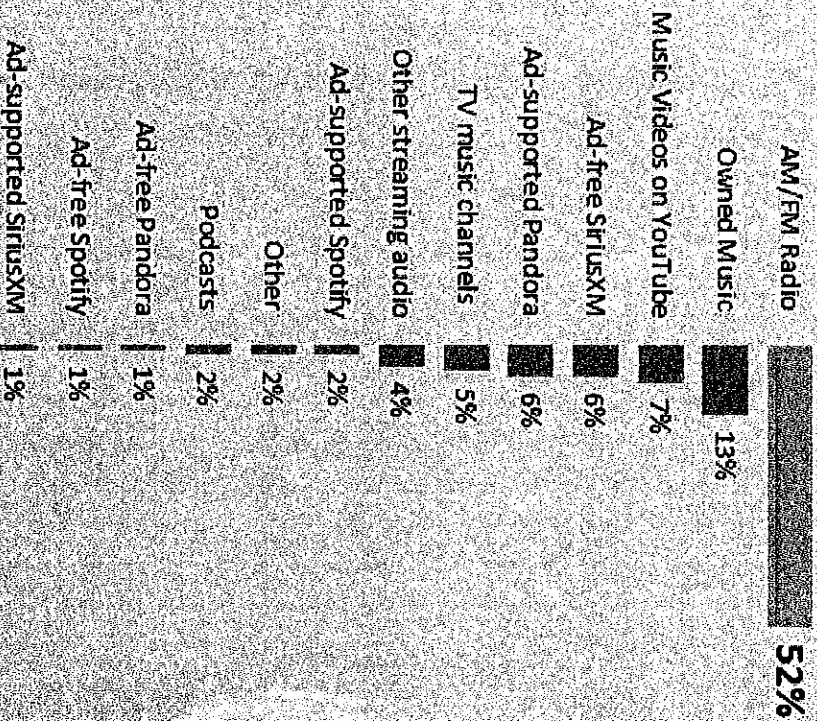
Source: Average Week, Smartphone = Nielsen Electronic Mobile Measurement, Q3 and Android, Q1/26/15 - Q3/01/15; Tablet = Nielsen Electronic Mobile Measurement, Q3, Q1/26/15 - Q3/01/15, unweighted, projections based on estimates from the NEMSR/NPM Panel

RADIO VS. OTHER AUDIO OPTIONS

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THE GREATEST SHARE OF EAR™



Source: Source: Edison Research, "Share of Ear," Q4 2015-Q1 2016, Q2-Q3 2016. Persons 18+ SiriusXM, Ad-supported, Spoken Word, Ad-free Music Percentages may not add up to 100% due to rounding.

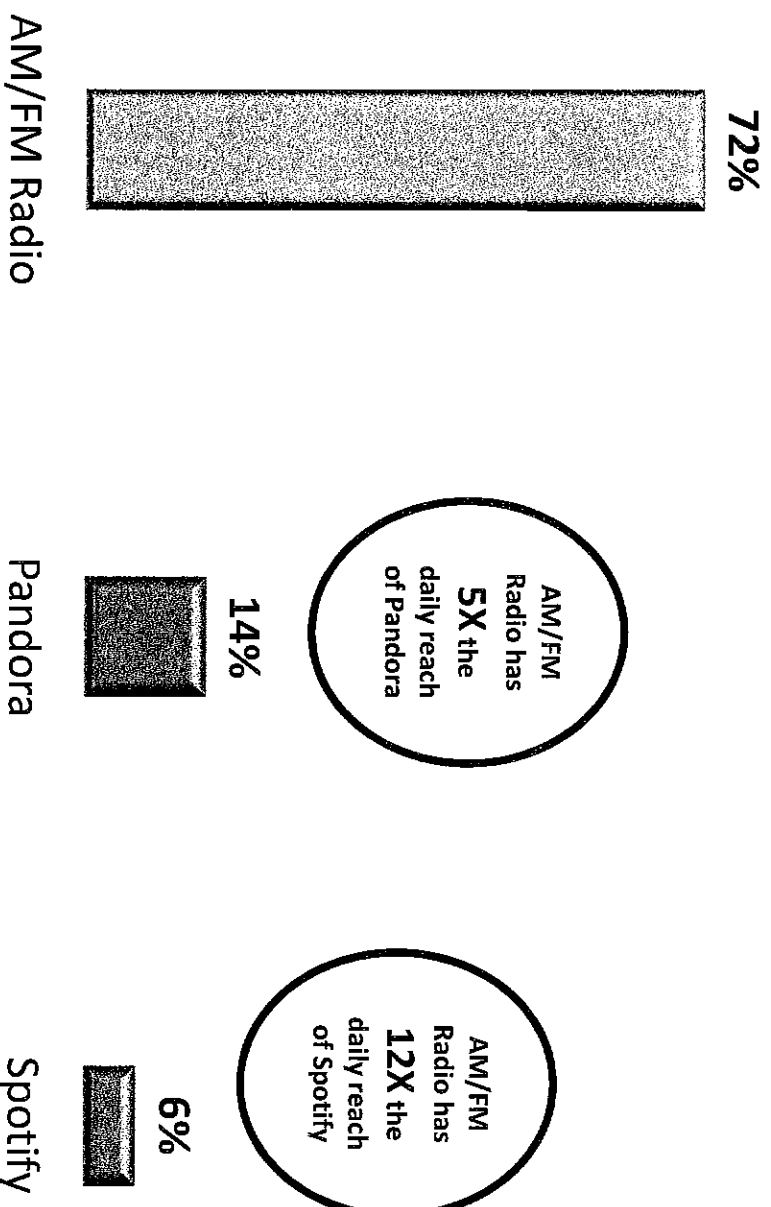
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AM/FM RADIO REACHES SIGNIFICANTLY MORE PEOPLE THAN DIGITAL AUDIO

% of Adults 18+ who listen daily

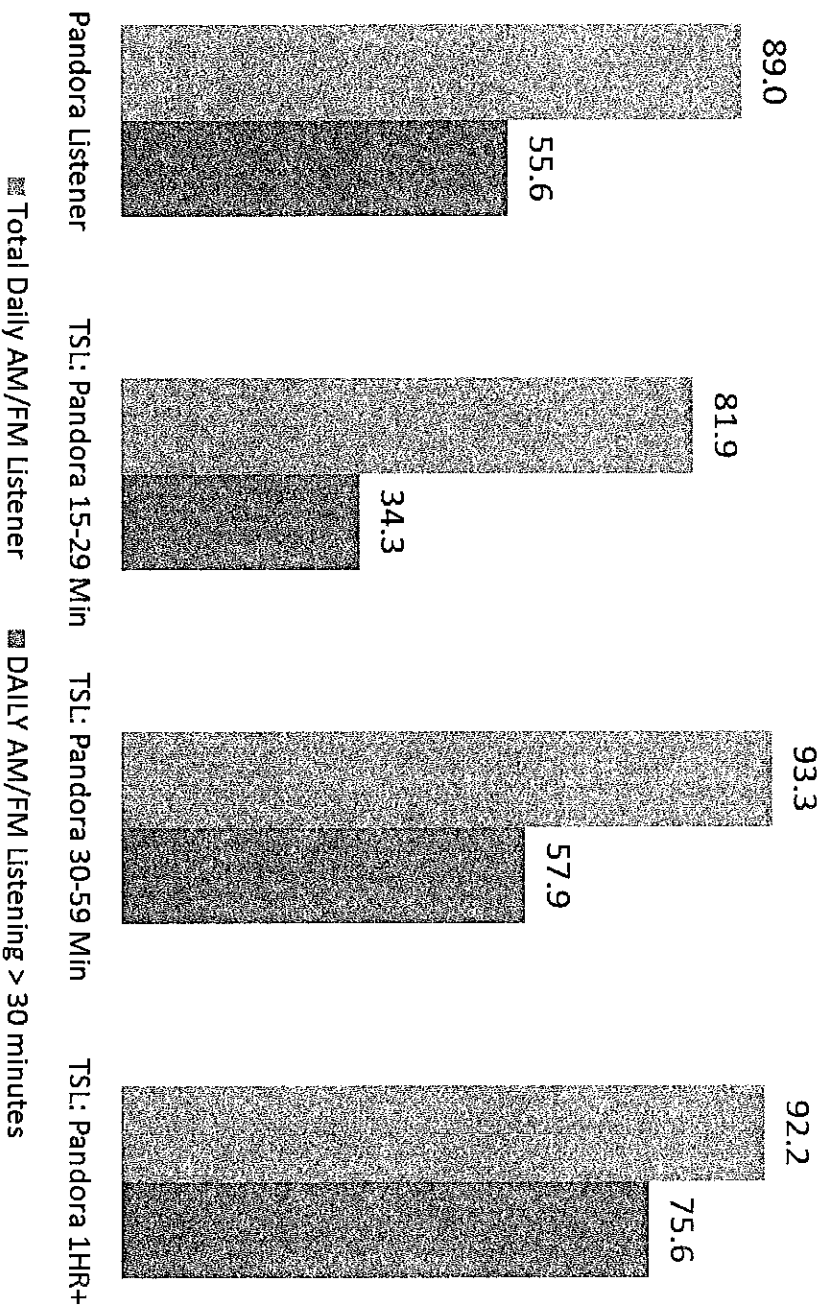


Source: Edison Research, "Share of Ear," Q4 2015-Q1 2016, Q2-Q3 2016, Persons 18+
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HEAVY PANDORA USERS ARE HEAVY BROADCAST RADIO LISTENERS



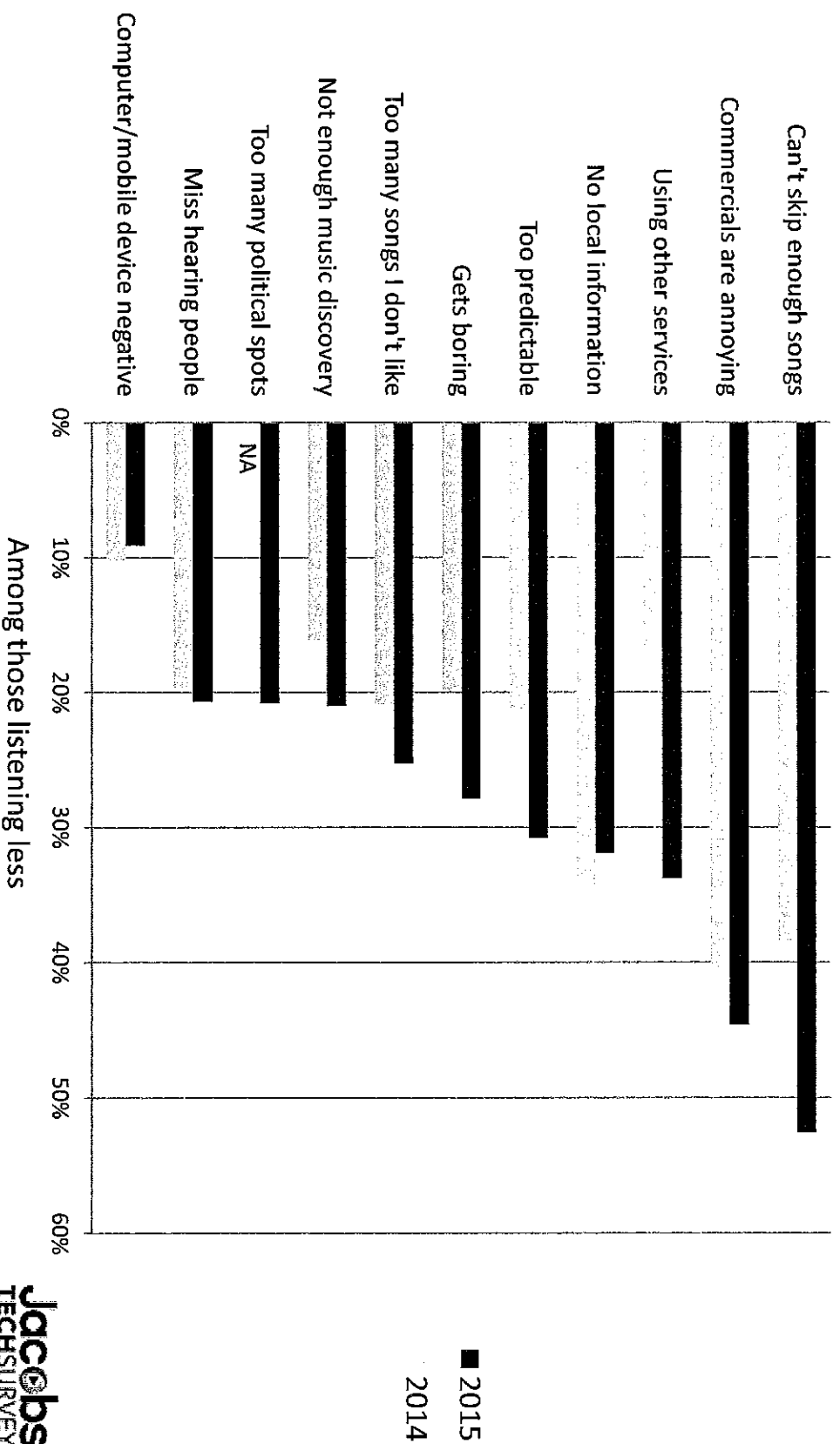
Based on 1,110 respondents 14-54 in PPM markets

Source: NuVoodoo study based on 1,110 respondents 14-54 in PPM markets - released 2014
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CHANGING VIEWS OF PANDORA LISTENERS



Source: Jacobs TechSurvey 11, 2015

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RADIO DELIVERS RESULTS

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RADIO DRIVING INFLUENCE AND BEHAVIOR

Radio Advertising topped Television, Social Media, and Direct Mail and **was 2X as effective** as Newspapers in influencing Healthcare choices.

As a consumer gets **closer to buying a vehicle**, advertising **influence** goes up with **Radio edging out** all others in last 30 days.



Source: Automotive and Healthcare F.C.T. Reports 2013 & 2014, Radio Advertising Bureau and PressStaff Interactive
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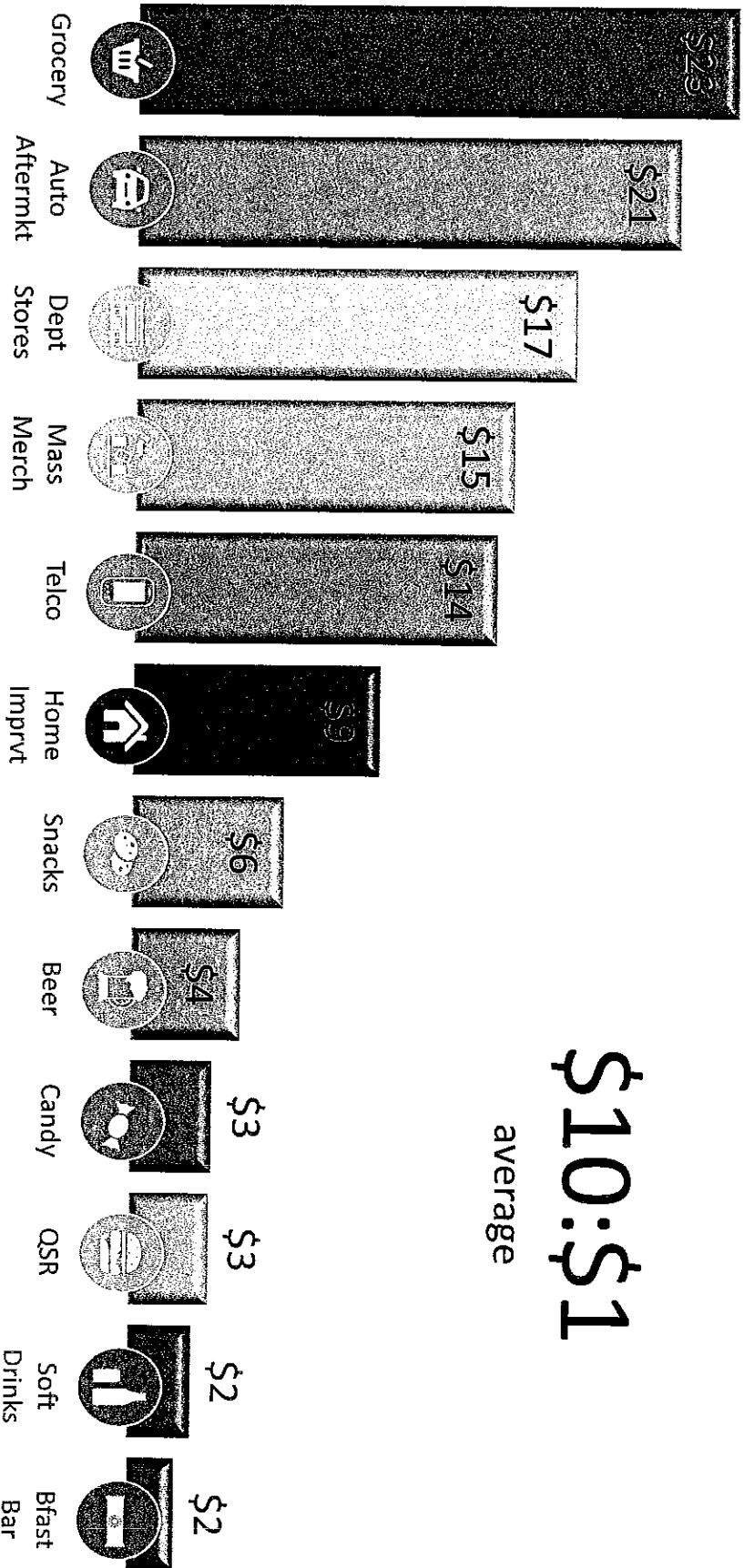


RADIO HAS POSITIVE IMPACT ON PRODUCT SALES

Radio payback per \$1 investment

\$10:\$1

average

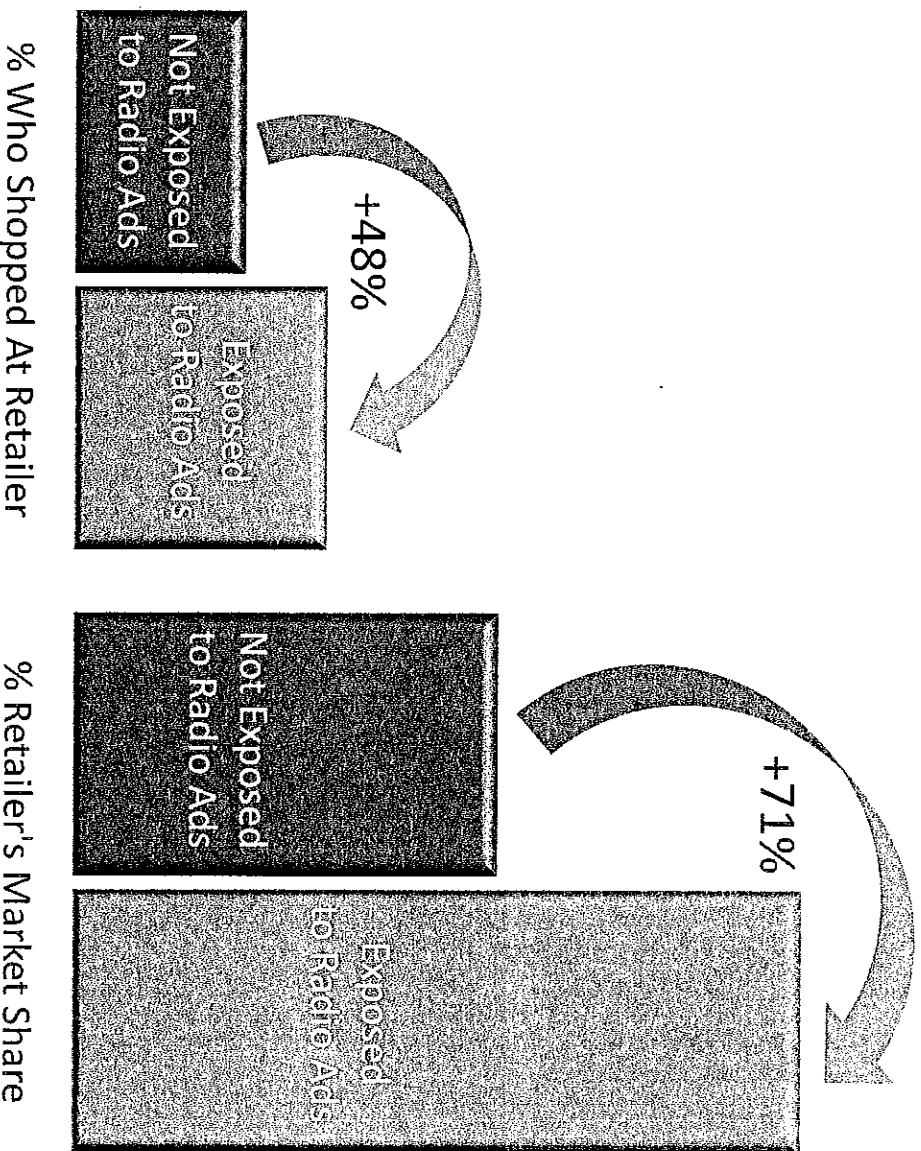


Source: Nielsen Studies 2014-2016
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RADIO ADS BROUGHT IN MORE CUSTOMERS AND LIFTED MARKET SHARE

Not only did AM/FM Radio grow the client's sales, Radio increased the number of new vs existing customers by **64%** when the ads were running.



Source: Nielsen Buyer Insights (NBI), Sales Effectiveness Analysis, Auto Aftermarket Retailer, Persons 18+. Unexposed: 12,329; Exposed: 14,147. Pre-period = 3/1/15-6/30/15. Test period = 3/1/16-6/28/16.

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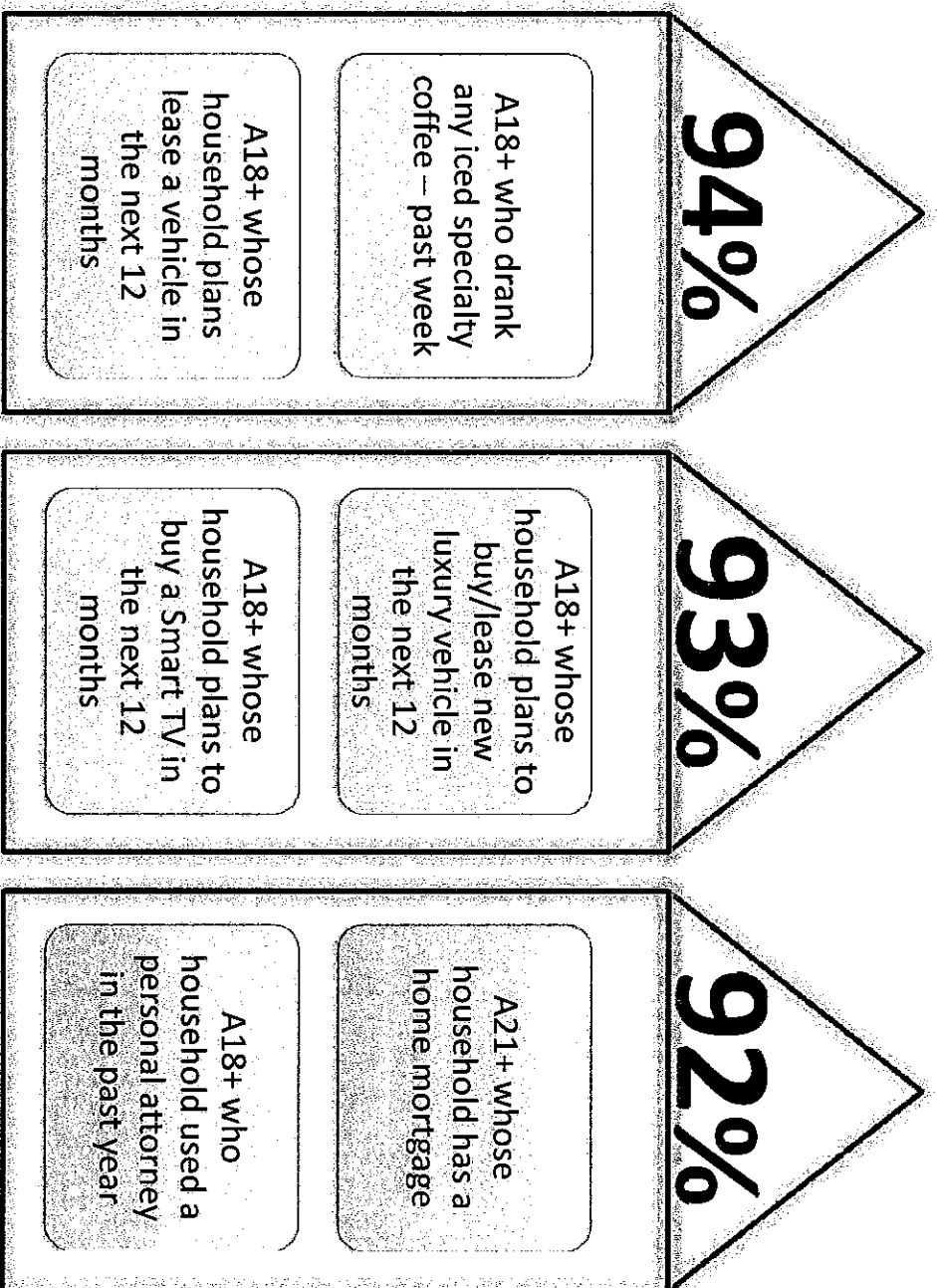
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RADIO REACHES YOUR TARGET

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REACHING MAIN STREET CONSUMERS



Source: Scarborough USA+ 2015 Release 1 (February 2015 – April 2016)

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A Friend Within the Community

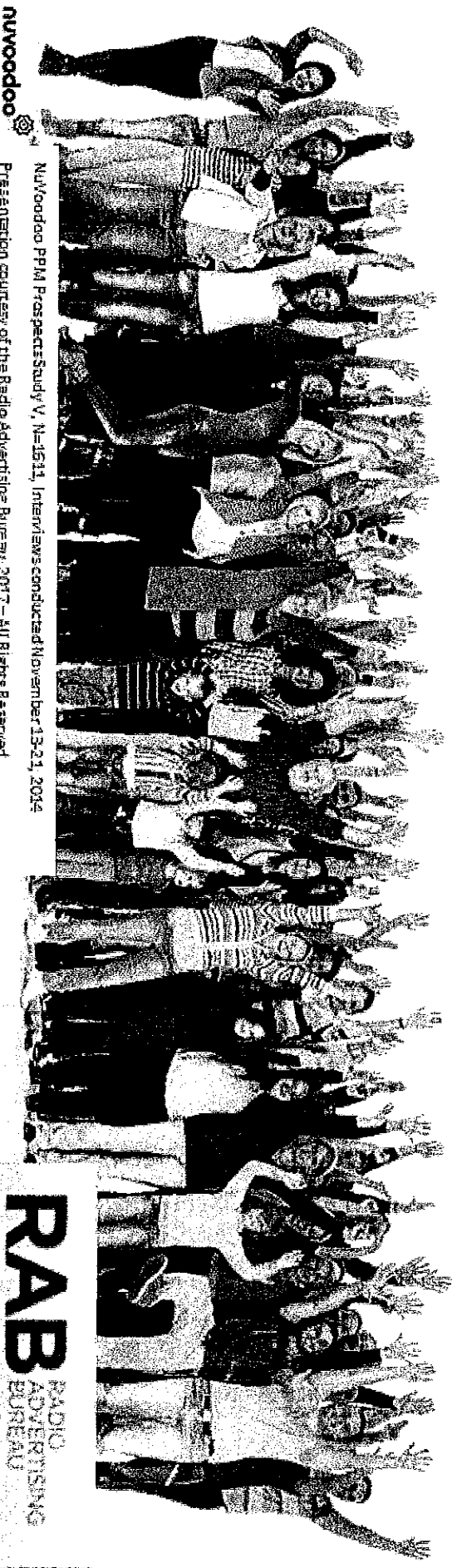
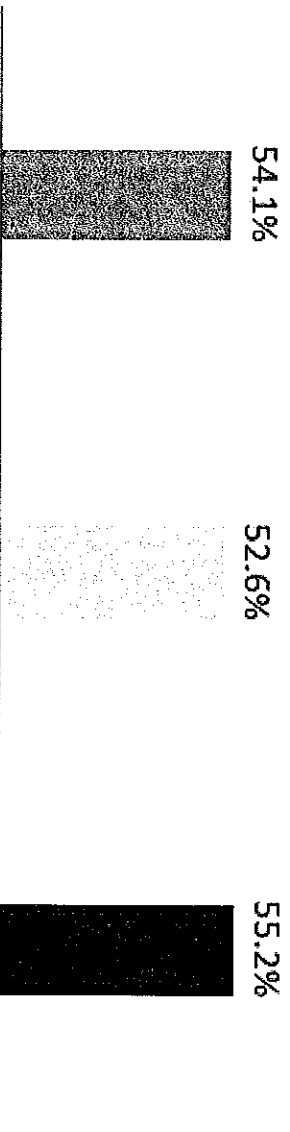
RADIO AND ITS PERSONALITIES

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CONNECTED WITH THEIR COMMUNITY

Radio is great because the stations connect
with their local communities [Agree only]

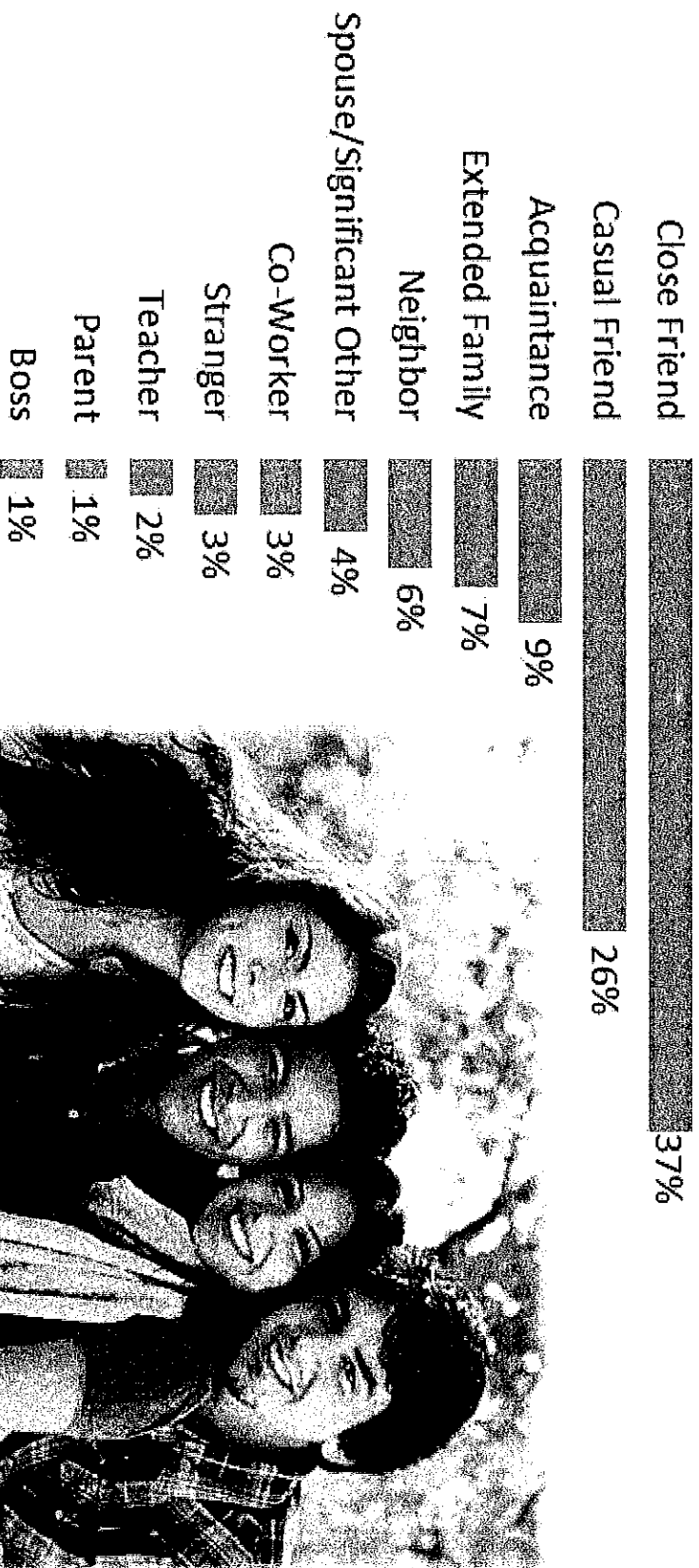


nuvoodoo

Nuvoodoo PPM Prospect Study V, N=1511, Interviews conducted November 13-21, 2014
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RADIO - A LISTENER'S FRIEND



What would [station] listen to most? be TO YOU? That is, what would his/her relationship be to you? Pick the one word that best describes it.

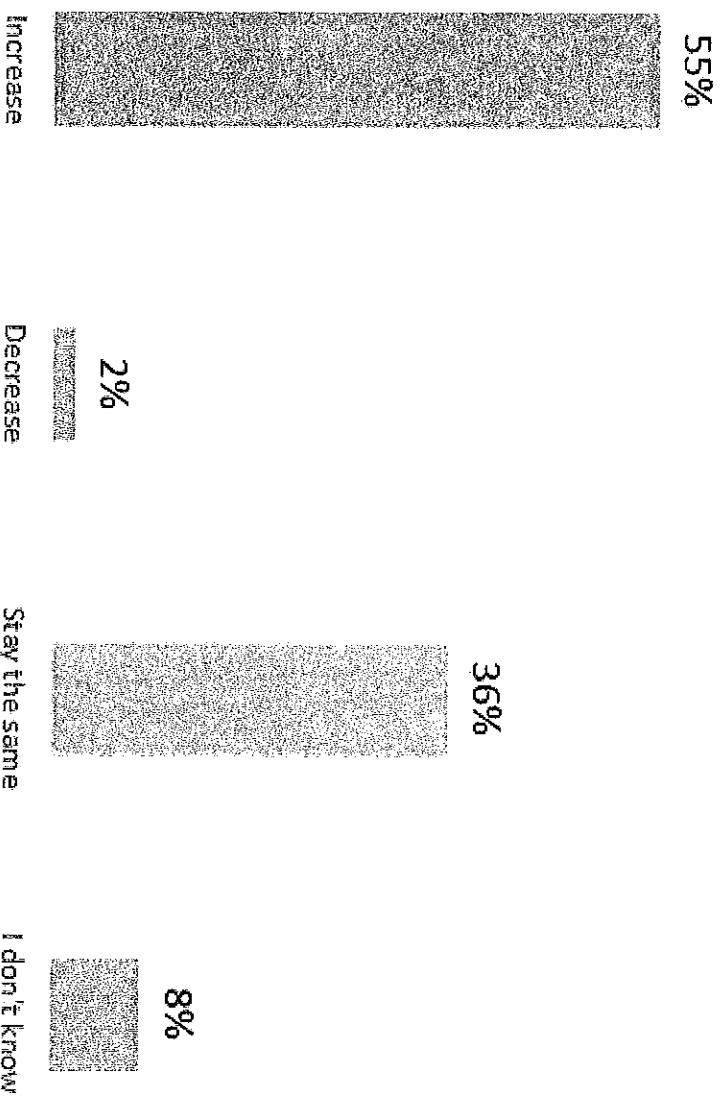
MARK KASSOFF

Source: Mark Kassoff & Co. ListenaThink, based on an online survey of 1,104 listeners 18-54
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PERSONALITY TESTIMONIALS DRIVE RADIO LISTENER TRUST



Does hearing one of your favorite radio station personalities provide testimonials for health care or medical products or services make you trust that product or service...



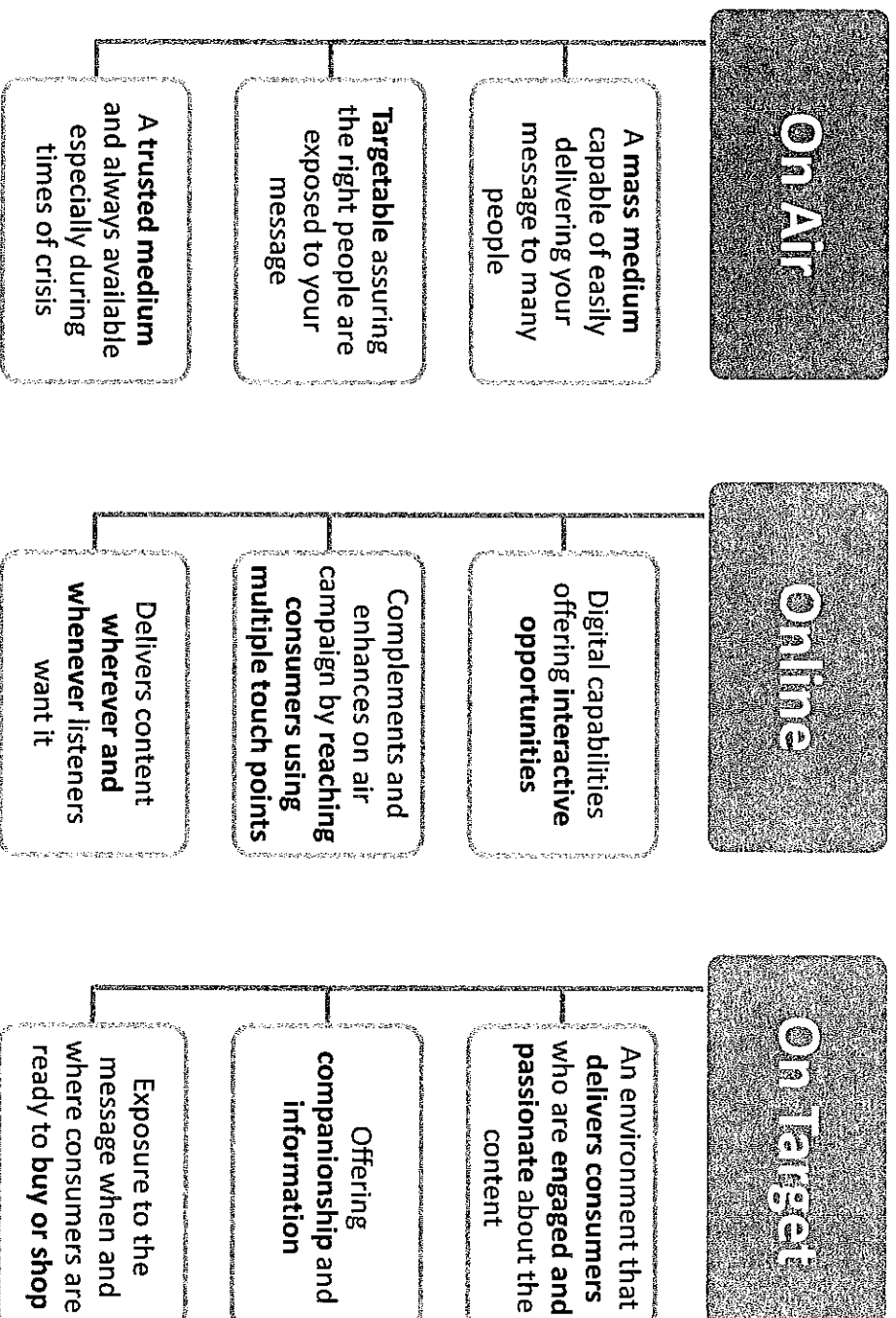
Source: Healthcare F.C.T. Report 2014, Radio Advertising Bureau and PressLive Interactive

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RADIO. IT'S ON.



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