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ADVERTISING
BUREAU

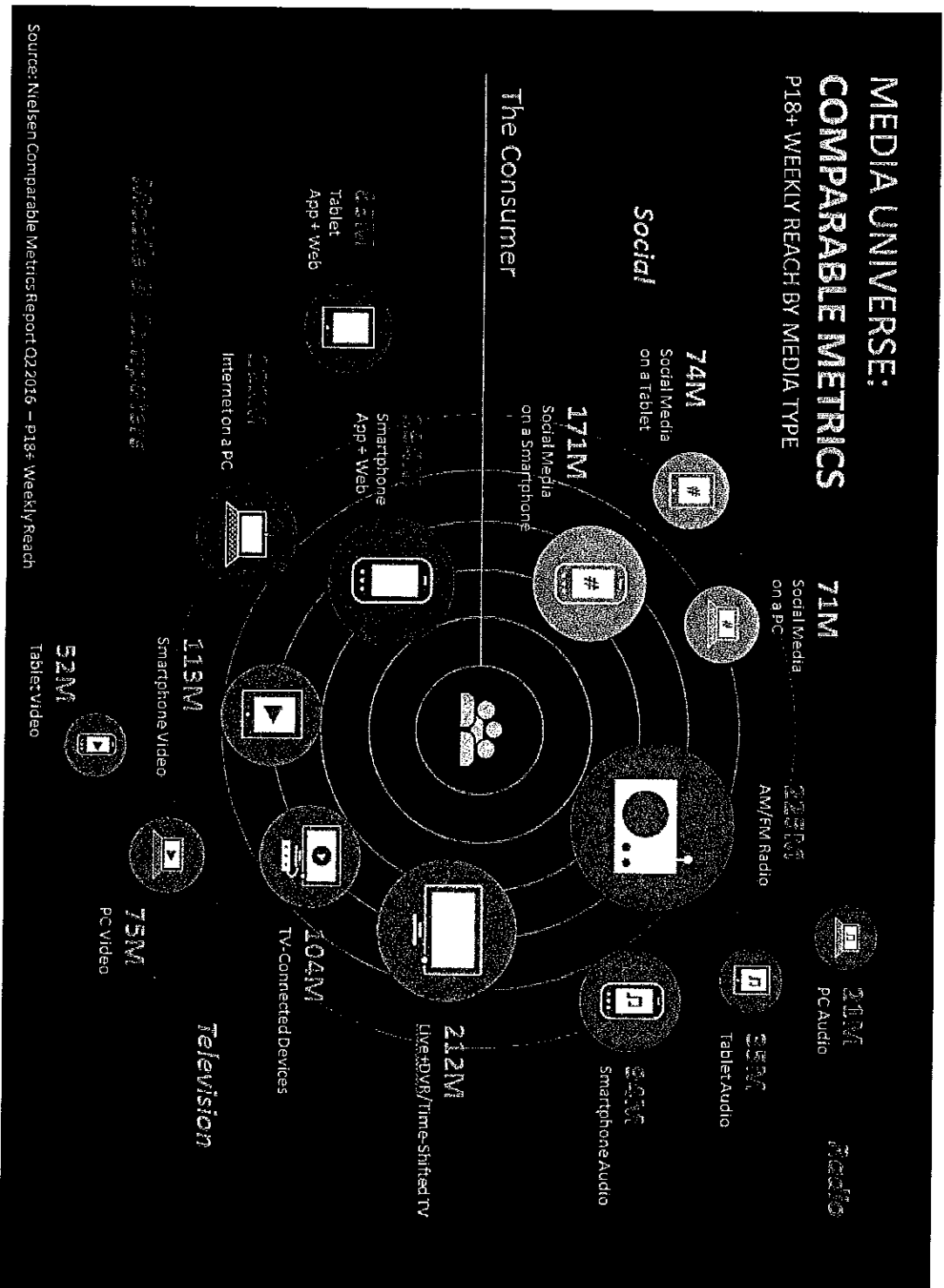
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RADIO: IT'S ON.

TODAY'S MEDIA LANDSCAPE

MEDIA UNIVERSE: COMPARABLE METRICS

P18+ WEEKLY REACH BY MEDIA TYPE



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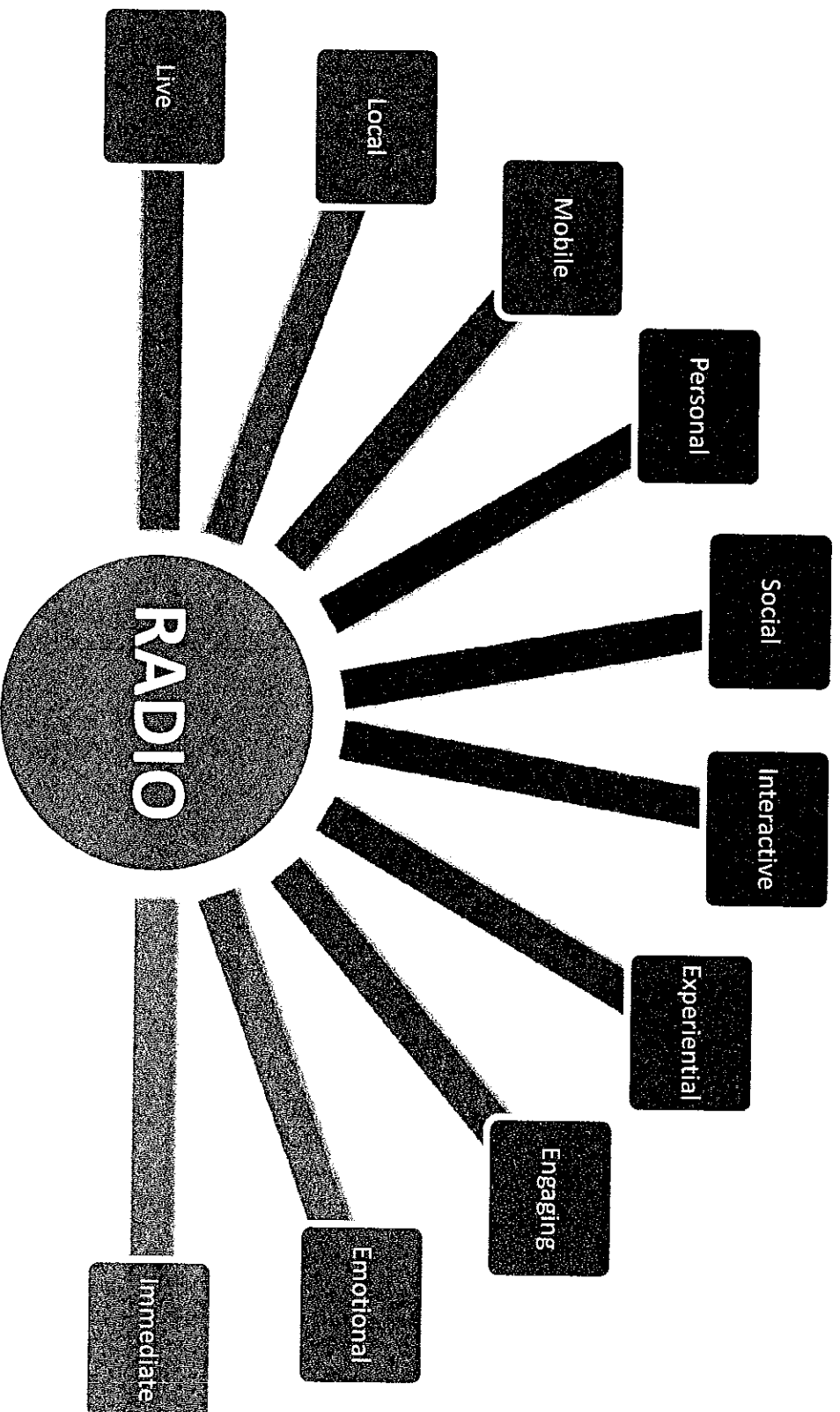
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RADIO

A mass medium delivering audio content to passionate
and loyal listeners across multiple platforms

RADIO TODAY

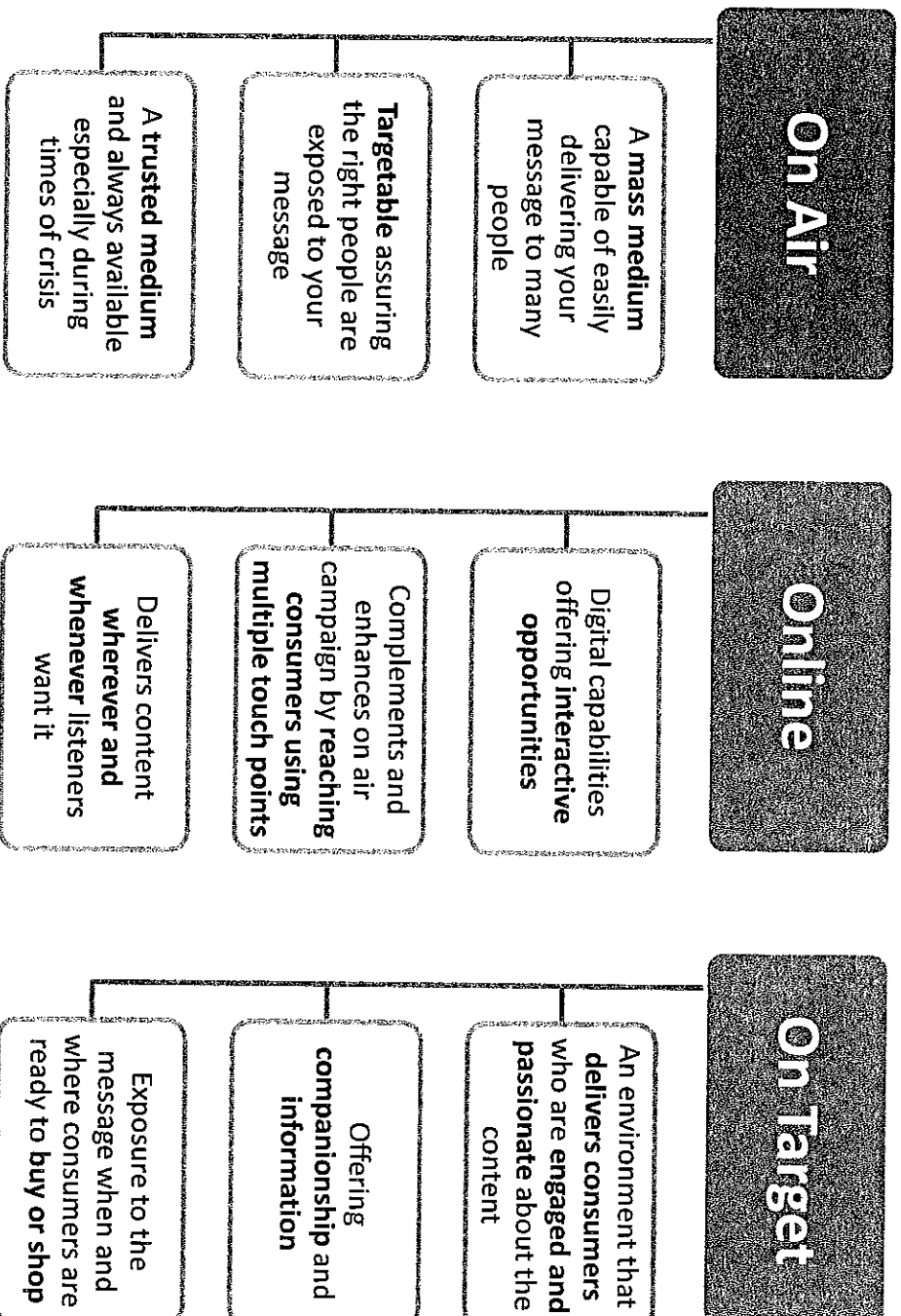


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Radio
reaches

over

247

p12+

every week

Million



Source: Nielsen Audio, RAJAR 13, December 2016 (Persons 12+, Monday-Sunday 24-Hour Cumulative Estimates)
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91%
of Americans 12+
every week

Source: Nielsen Audio, RAJAR 131, December 2016 (Persons 12+), Monday-Sunday 24-Hour Weekly Cumulative Estimates

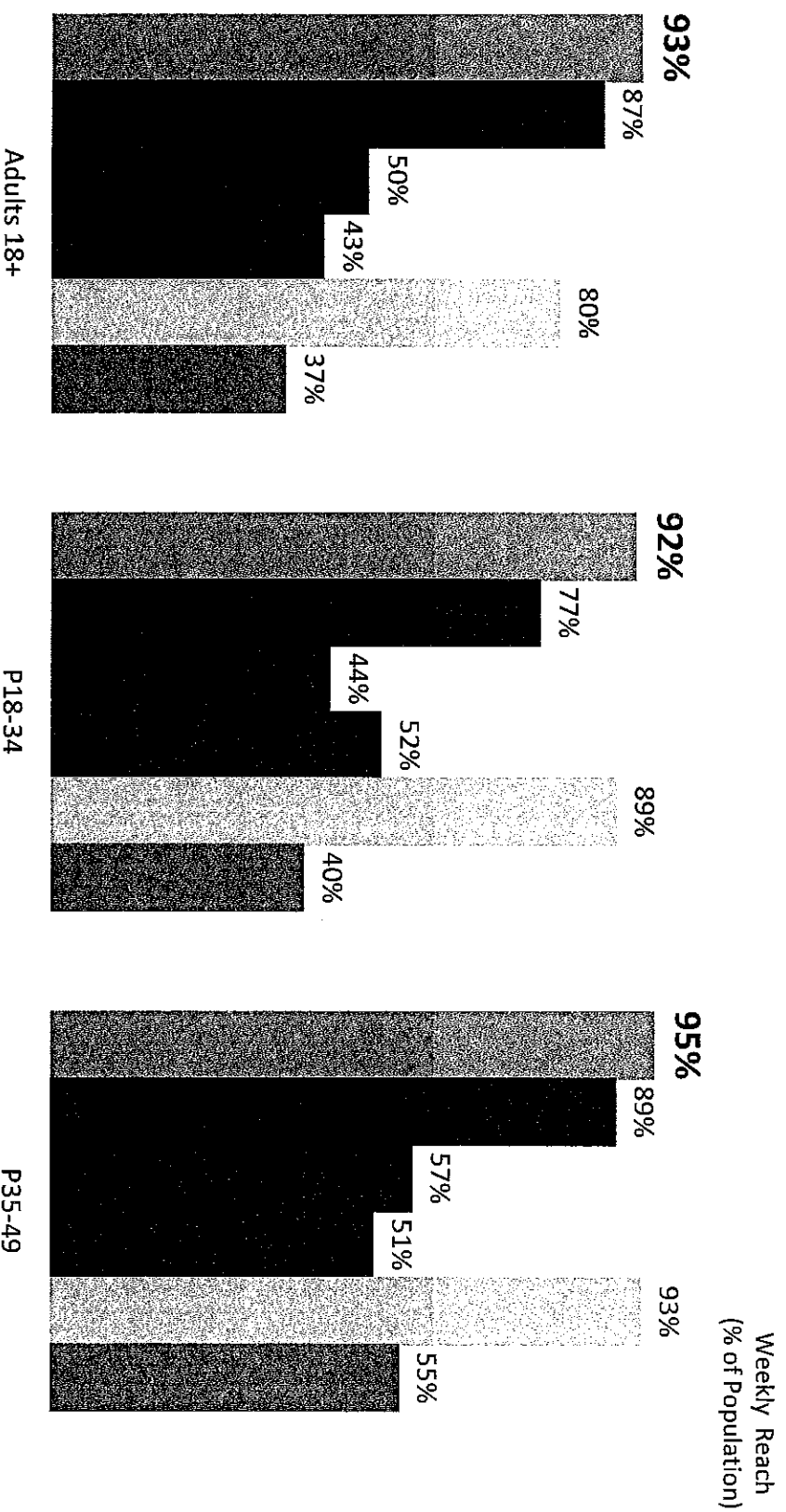
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RADIO'S INCREDIBLE REACH

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RADIO BOASTS HIGHEST MASS REACH AMONG POPULAR MEDIA



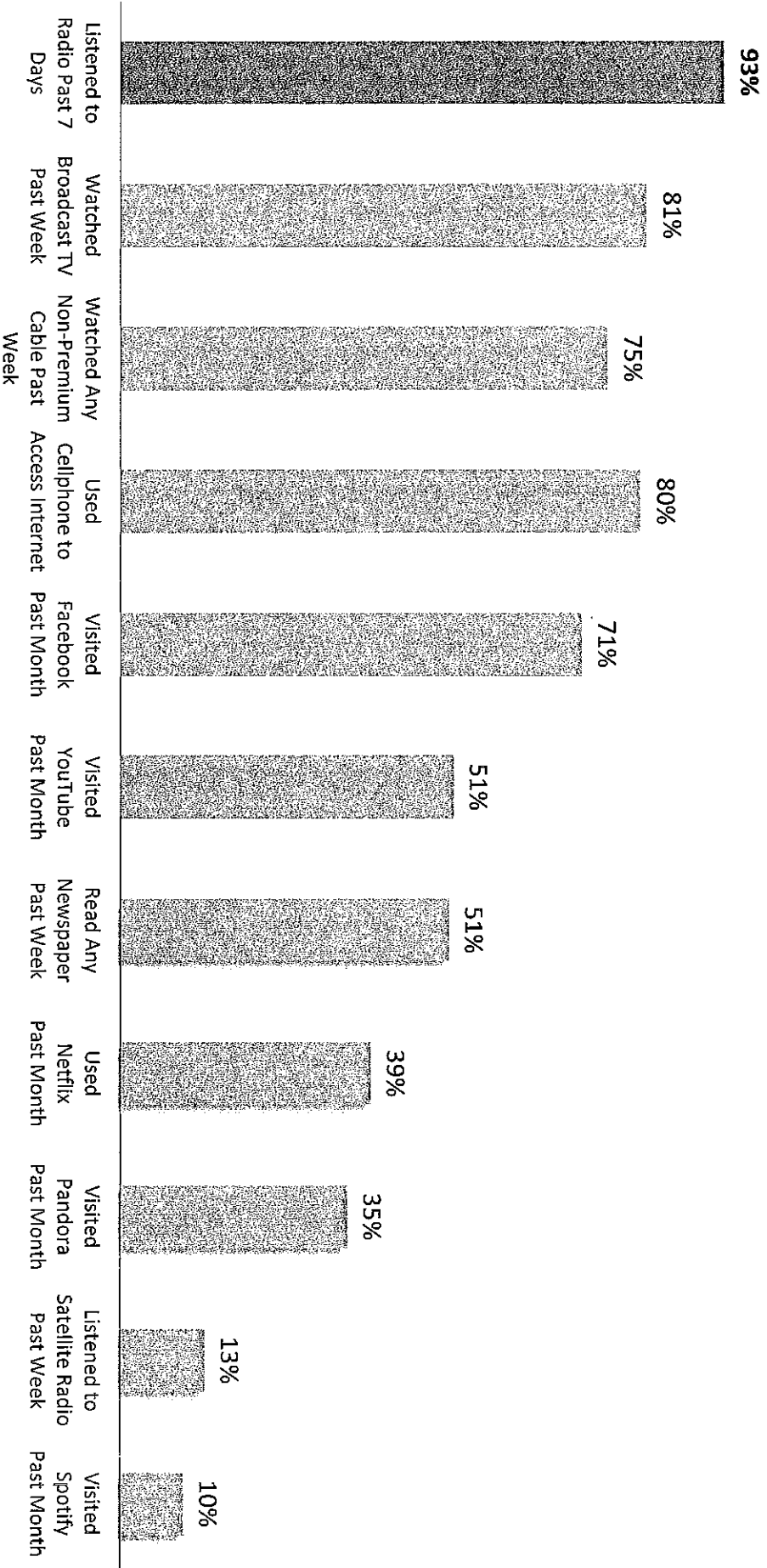
Source: Nielsen Comparable Metrics Report Q2 2016
Presentation courtesy of the Radio Advertising Bureau, 2016 – All Rights Reserved

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HIGHEST REACH AMONG ALL MEDIA OPTIONS

Adults 18+



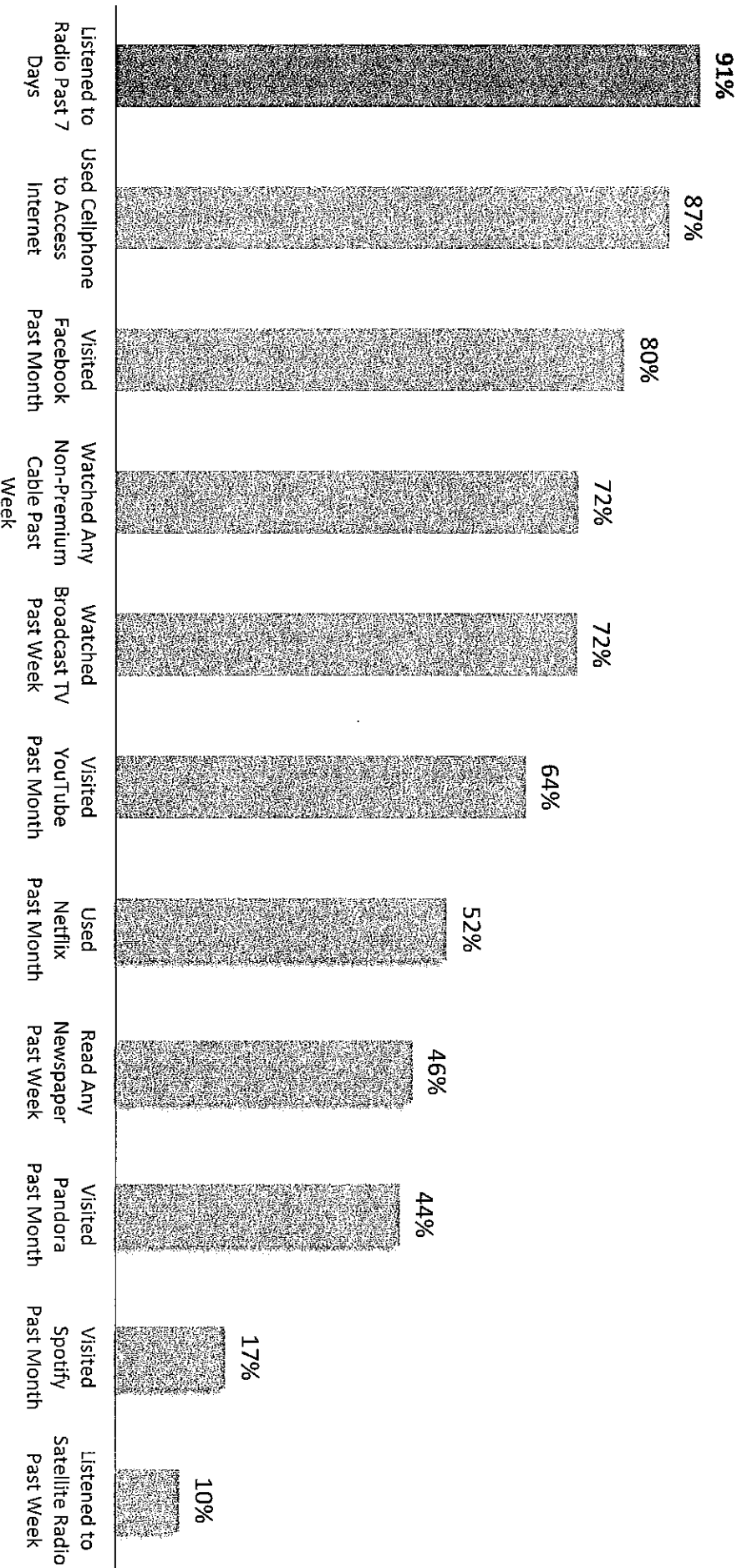
Source: Scarborough USA+, 2016 Release 1 Adults 18+ (February 2015 – April 2016)
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HIGHEST REACH AMONG ALL MEDIA OPTIONS

Adults 18-34



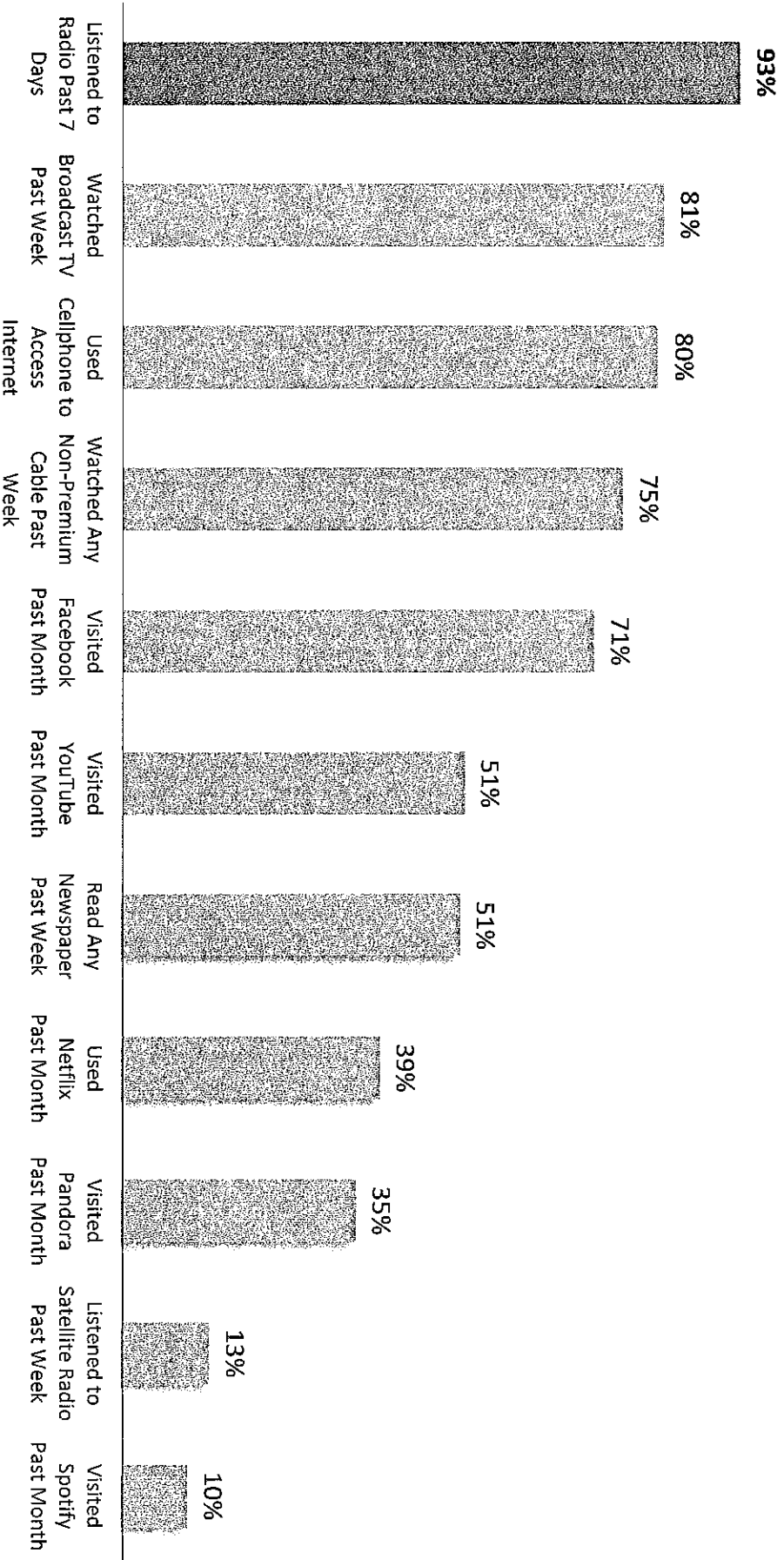
Source: Scarborough USA+, 2016 Release 1 Adults 18-34 (February 2015 – April 2016)
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HIGHEST REACH AMONG ALL MEDIA OPTIONS

Adults 25-54



Source: Scarborough USA+, 2016 Release 1 Adults 18+ (February 2015 – April 2016)
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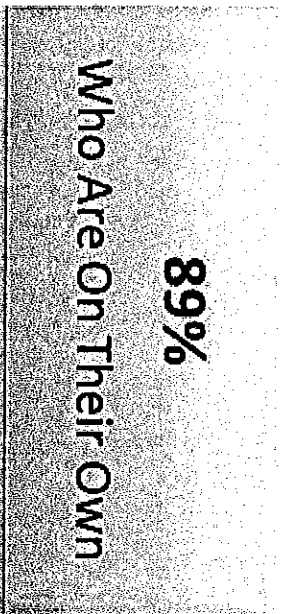
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RADIO REACHES MILLENNIALS ACROSS THEIR STAGES OF LIFE



90%
of Dependent Adults



89%
Who Are On Their Own



92%
Who Are Starting Family

Source: Nielsen Total Audience Report Q4 2015 Adults 18+

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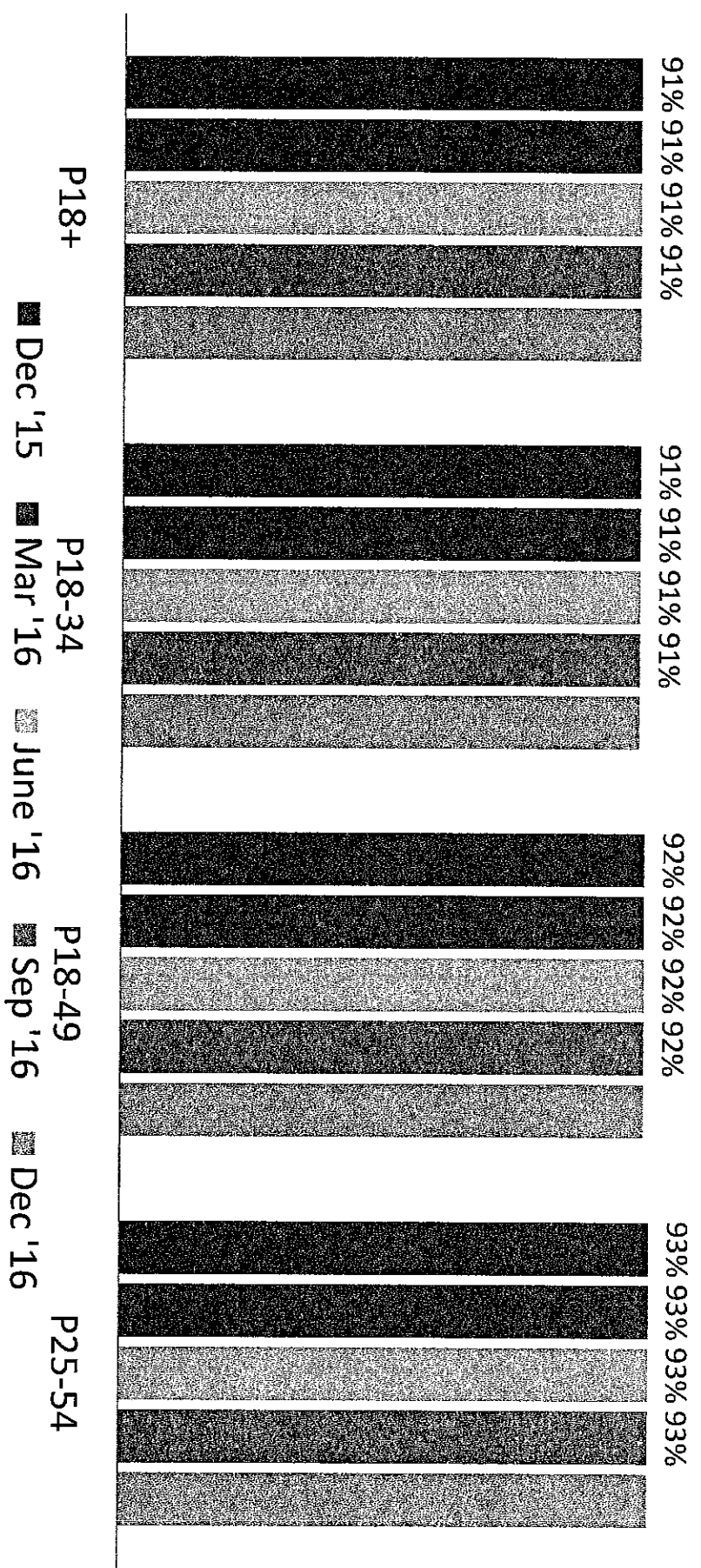
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Weekly Cumulative Radio Audience
(P18-34)

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CONSISTENT REACH LEVELS

A MEDIUM FOR ALL SEASONS

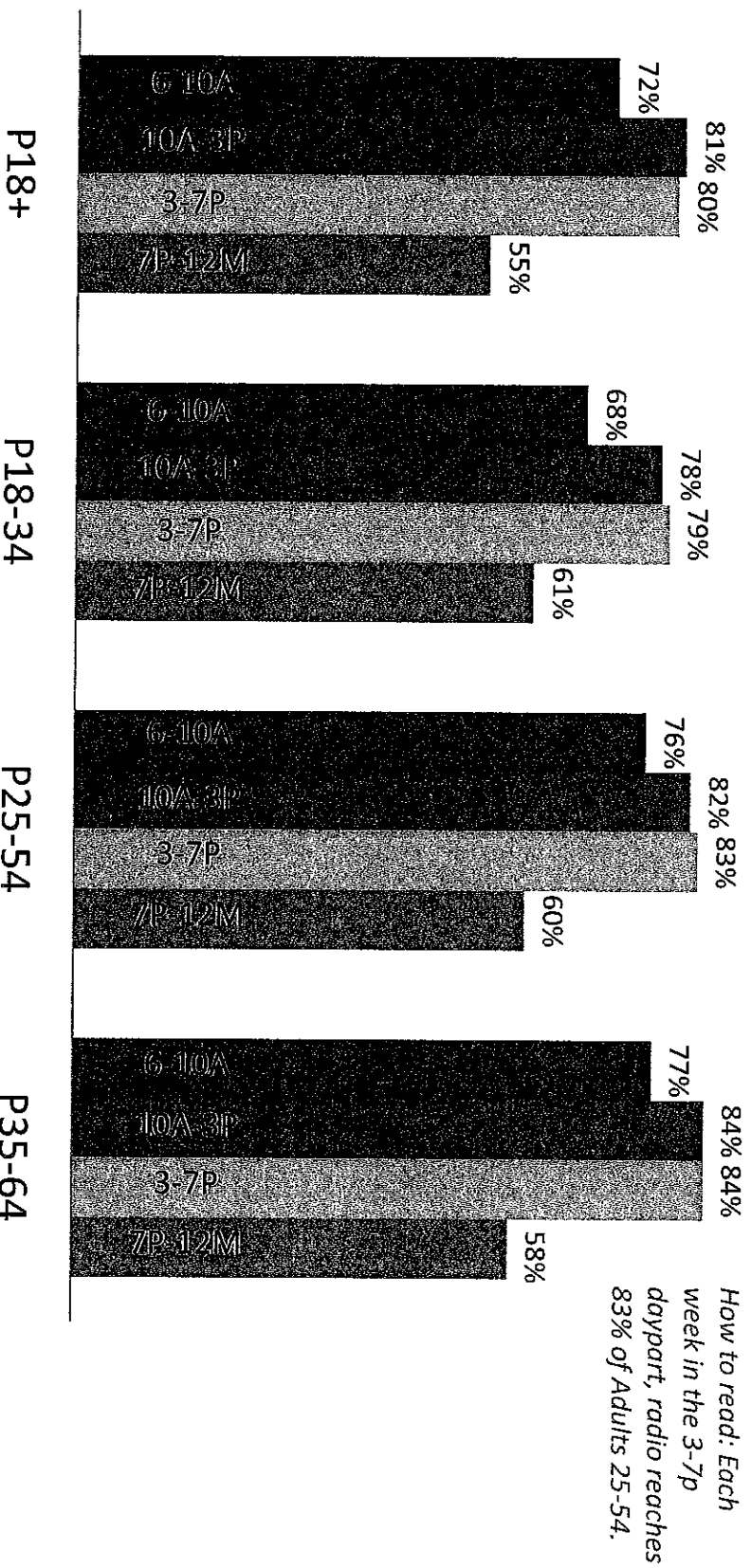


Source: Nielsen Audio, RADAR® 127-131, December 2015, March 2016 – December 2016 (Monday-Sunday 24-Hour Cumulative Estimates, All Radio)
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RADIO PEAKS DURING THE WORKDAY



Source: Nielsen Audio, RADAR 131, December 2016 (Persons 18+, 18-34, 25-54 and 35-64, Monday-Sunday 24-Hour Weekly Cumulative Estimates, All Radio)

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PEOPLE LISTEN AND LISTEN

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COMPARABLE GENDER TUNE-IN



M18+
15 Hours
Per Week

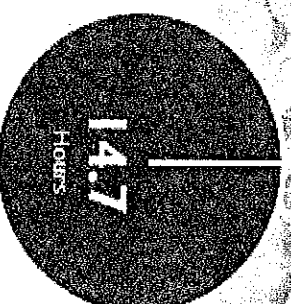
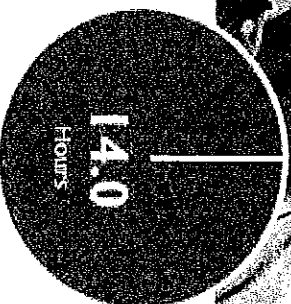
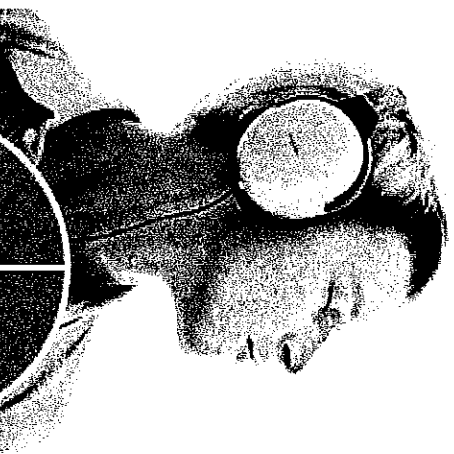
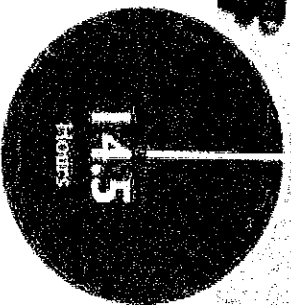
W18+
13 Hours
Per Week

Source: Nielsen Audio, RAJAR 131, December 2016, (Monday-Sunday 24-Hour Week) TSL Estimates)
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TUNE-IN TIME IS HIGH ACROSS ALL POPULATION SEGMENTS



African American listeners, General Market listeners and Hispanic listeners
(A25-54)

Source: Nielsen Audio, RAB:AR 131, December 2016, (Monday-Sunday 24-Hour Weekly TSL Estimate)

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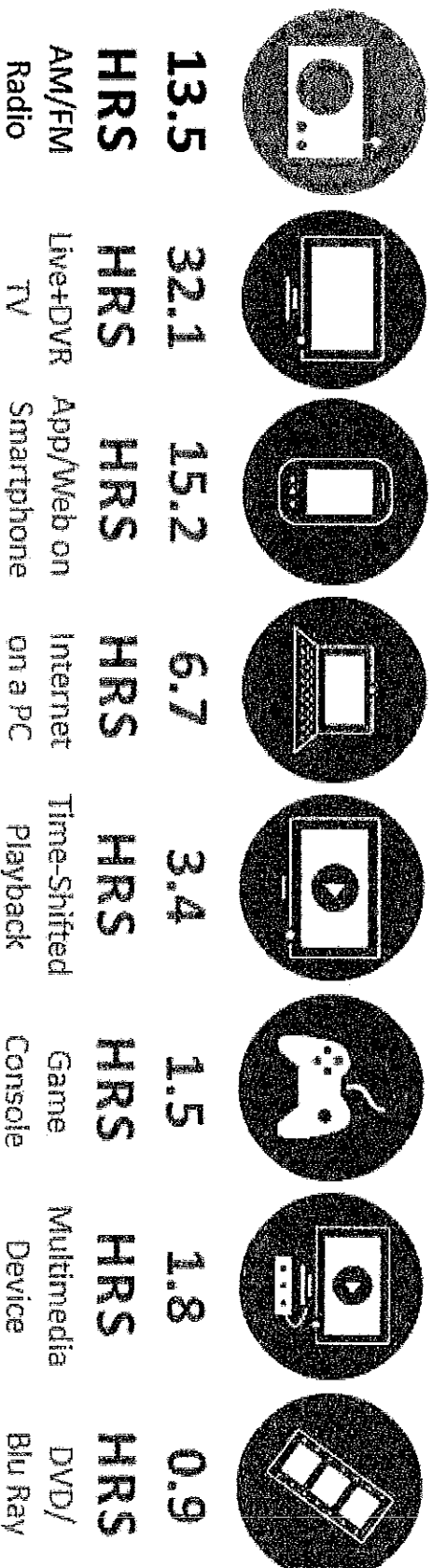
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Radio has a solid position in time spent with electronic devices by consumers.

Radio captures nearly 1/5 of all content hours.

Weekly hours spent with media



75.1 hours of content each week across radio, TV, online and mobile by average U.S. adults

Source: Nielsen, The Total Audience Report Q2 2016, Base: Adults 18+

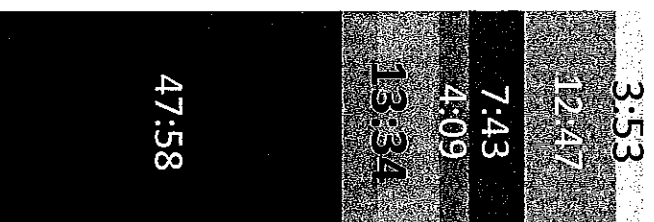
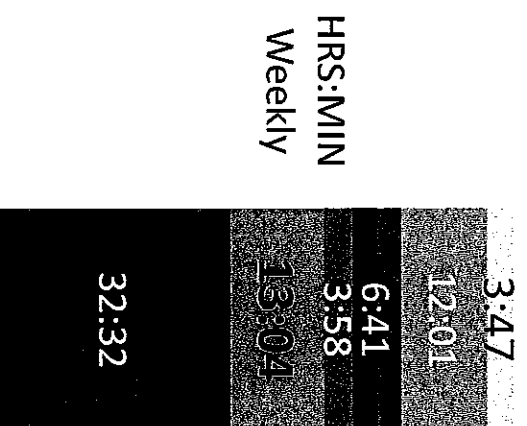
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RADIO'S TSL IS CONSISTENT ACROSS ALL GROUPS

WEEKLY TIME SPENT – ELECTRONIC DEVICES



Adults 18+

African-Americans 18+

Hispanics 18+

TV
 Radio
 TV-Connected Devices
 PC
 Smartphone
 Tablet

Source: Nielsen Comparable Metrics Report Q2 2016

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RADIO IS AN IMPORTANT PART OF TWEENS' AND TEENS' DAILY MEDIA

	Avg Time Among All	% Who Use	Avg Time Among Who Use	
Total Time Spent Listening to Music	:51	57%	1:29	2:20
Computer	:02	3%	---	2:11
Smartphone	:10	12%	1:25	1:41
Tablet	:06	10%	:57	1:36
Radio	:20	34%	:58	1:20
CDS	:04	5%	1:13	1:16
iPod/MP3 Player	:09	12%	1:17	1:46

Tween: 8-12 yrs
Teen: 13-18 yrs

Source: The Common Sense Consensus: Media Use by Tweens and Teens, 2015

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NO COMMERCIAL SKIPPING

RADIO LISTENERS ARE RECEPTIVE TO ADS

What Happens When
the Spots Come On?
2011 Edition

- 2011 highlights 93% retention
- 2006 highlights 92% retention
 - No time shifting
 - No below the fold
 - No load times

Sources: 2011 Nielsen Audio, Media Monitors, and Coleman Insights
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RADIO IS IMPORTANT TO LISTENERS

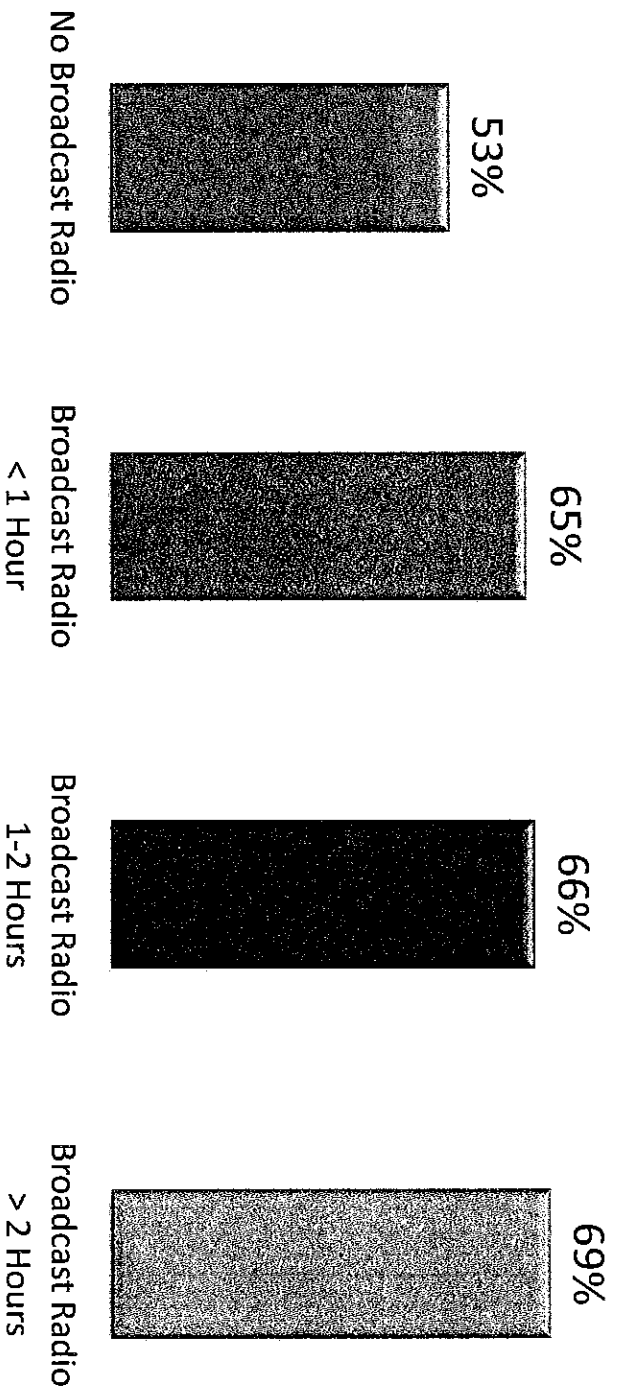
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RADIO LISTENERS USE SOCIAL MEDIA

HEAVY RADIO LISTENERS ARE FACEBOOK FANS, TOO

Facebook: Daily Usage



How to read: Among those who listen to Broadcast Radio more than two hours a day, 69% use Facebook daily.

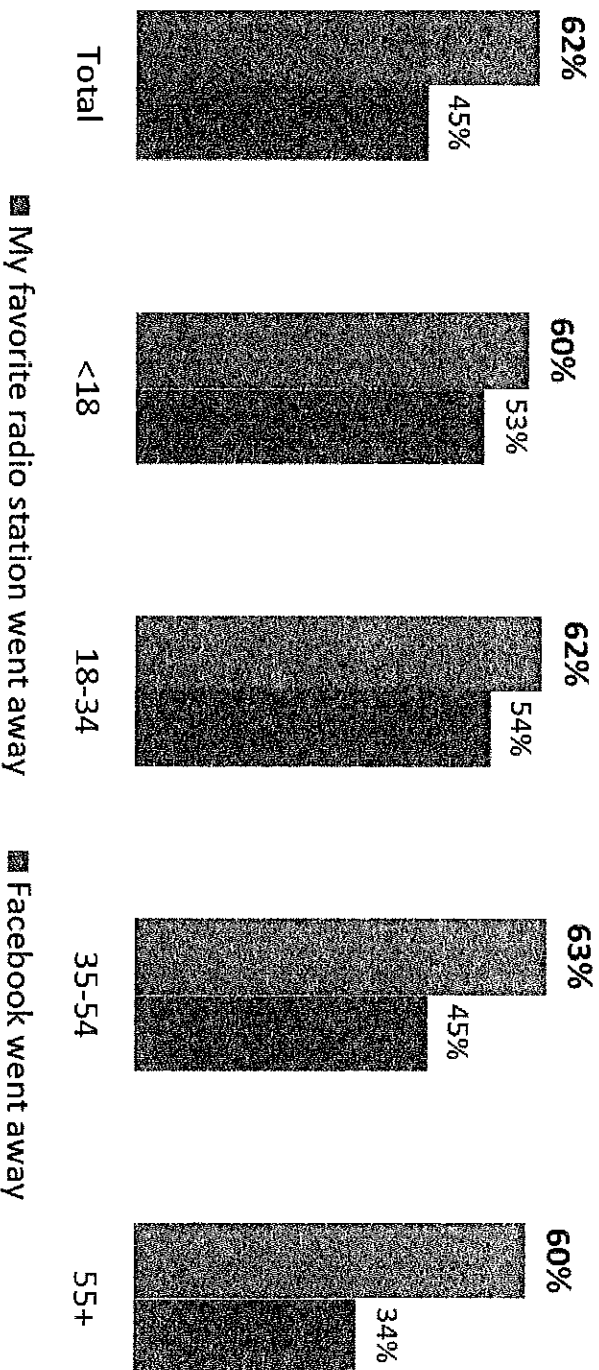


Source: Nuvoodoo, Based on 1,100 respondents 14-54 in PPM markets, 2015
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LISTENERS FAVOR RADIO OVER FACEBOOK



Read: I would be very disappointed if...

My favorite radio station went away
 Facebook went away

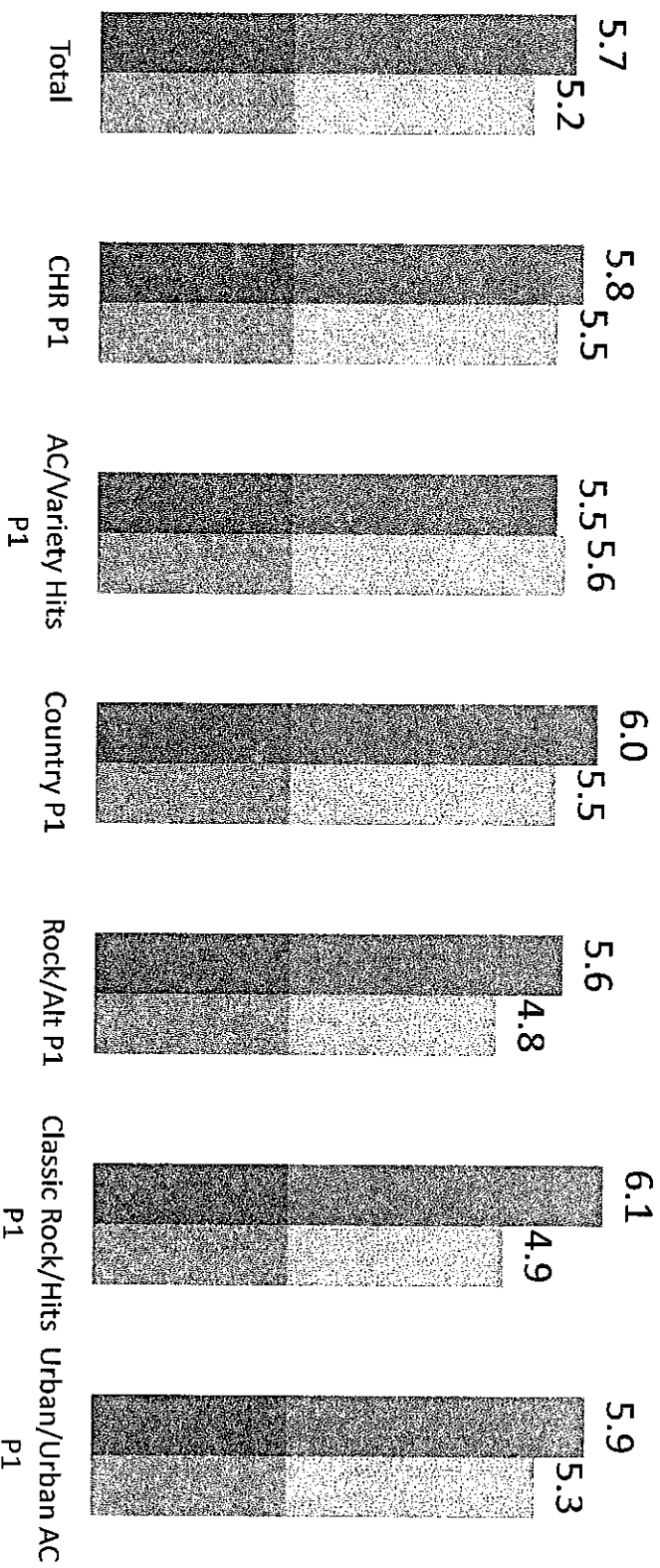
Source: Alan Burns/Triton Digital "The Future of Radio" September 2012 National Consumer Database: 25,000,000 Panelists; August & September 2012; All Ages, Genders and Format Fans; Total Polled = 41,252; Roughly in line with 2010 Census; Heavily Caucasian

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BROADCAST RADIO PLAYS MORE “LIKED” SONGS THAN PANDORA



Imagine you tune into the station you listen to most for music and listen to the next 10 songs. How many will be songs you like a lot?

Imagine you start a session on Pandora and listen to ten songs without skipping any of them. How many will be songs you like a lot?



Source: NuVoodoo, Based on 1,100 respondents 14-54 in PPM markets, 2014

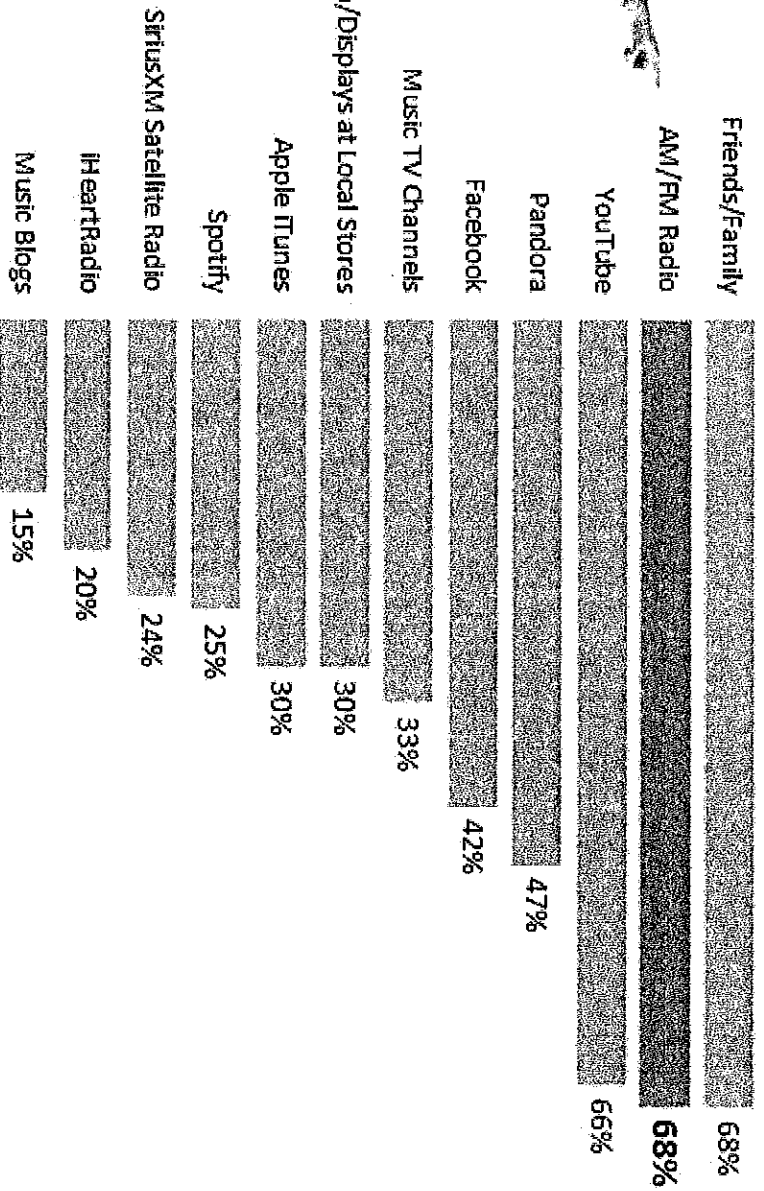
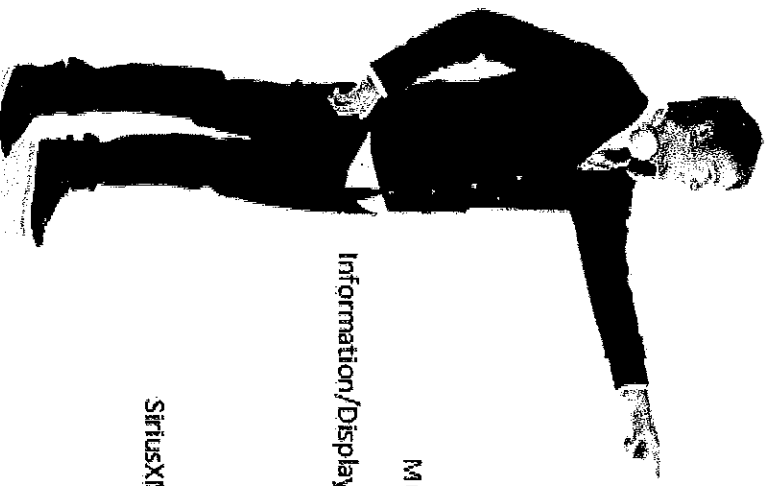
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RADIO'S THE TOP ELECTRONIC SOURCE FOR MUSIC DISCOVERY

% Who Ever Use Each Source to Learn About and Keep Up-To-Date With New Music



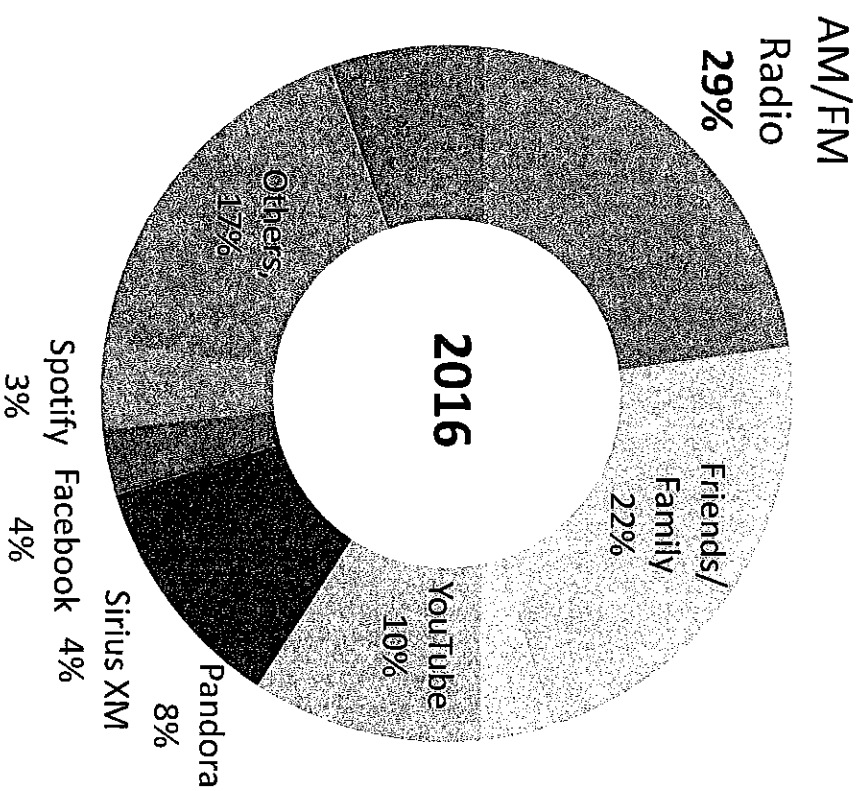
Base: Those saying it's "Very Important" or "Somewhat Important" to Learn About and Keep Up-To-Date With New Music

Source: The Infinite Dial 2016 - Edison Research / Triton Digital
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RADIO: MOST USED SOURCE FOR MUSIC DISCOVERY



Base: Those saying it is "Very Important" or "Somewhat Important" to Keep Up-To-Date With New Music

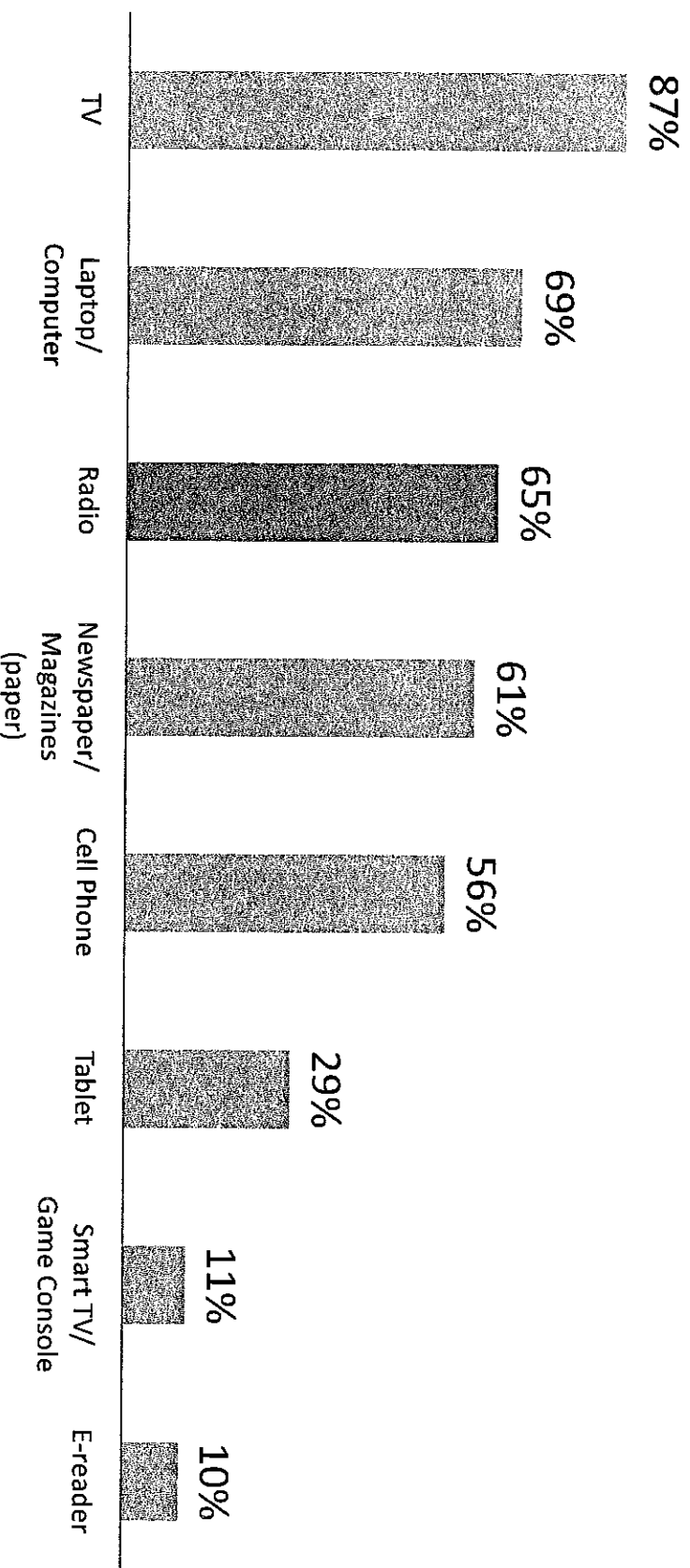
Source: The Infinite Dial 2016 – Edison Research / Triton Digital
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AMERICANS TURN TO RADIO FOR NEWS

% Using each medium last week to get news



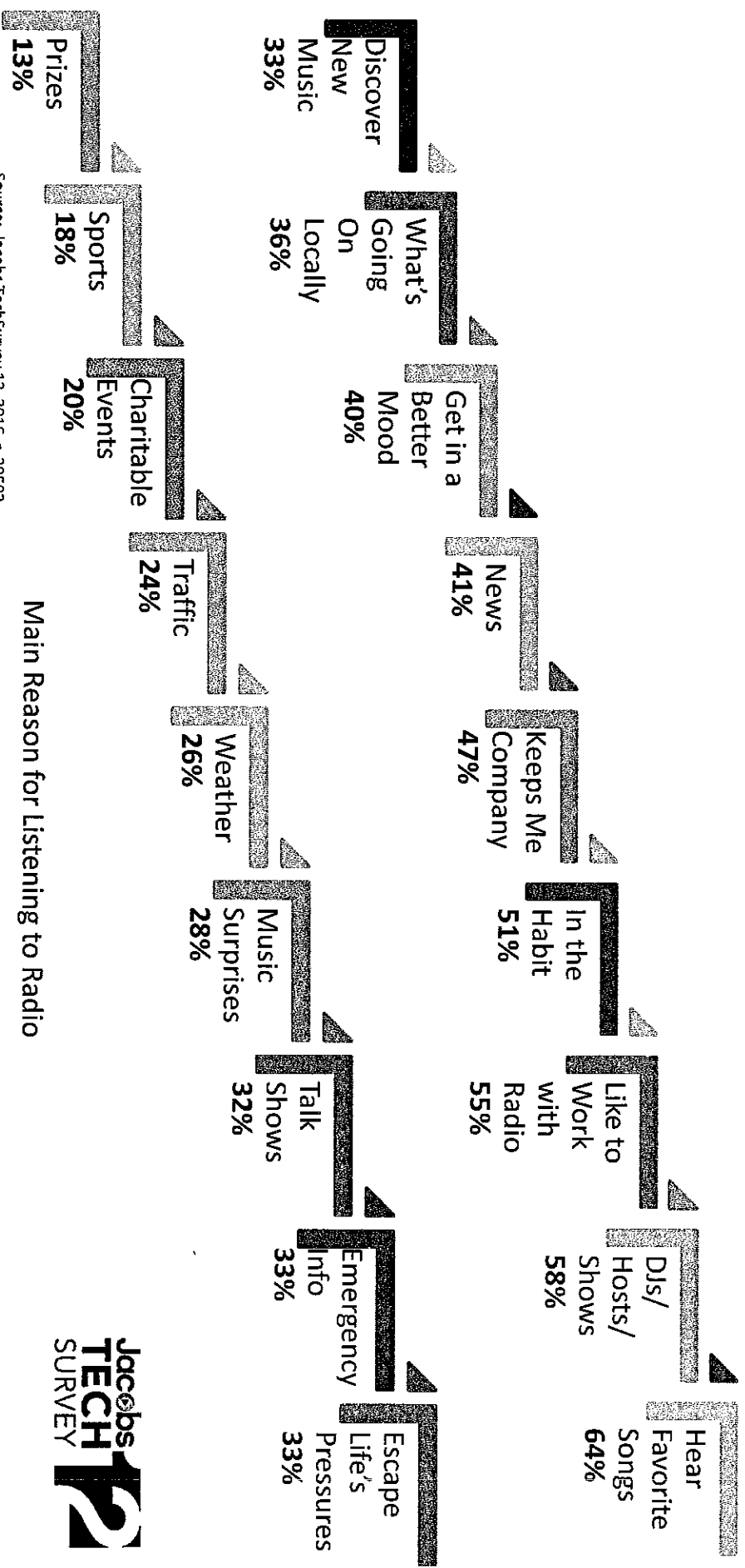
Source: The Media Insights Project, 2014; based on a nationally representative telephone survey of 1,492 adults, Jan 9 -Feb 16, 2014
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RADIO'S EQUATION

MUSIC + INFO + EMOTION



Main Reason for Listening to Radio

Source: Jacobs TechSurvey 12, 2016, n-39503
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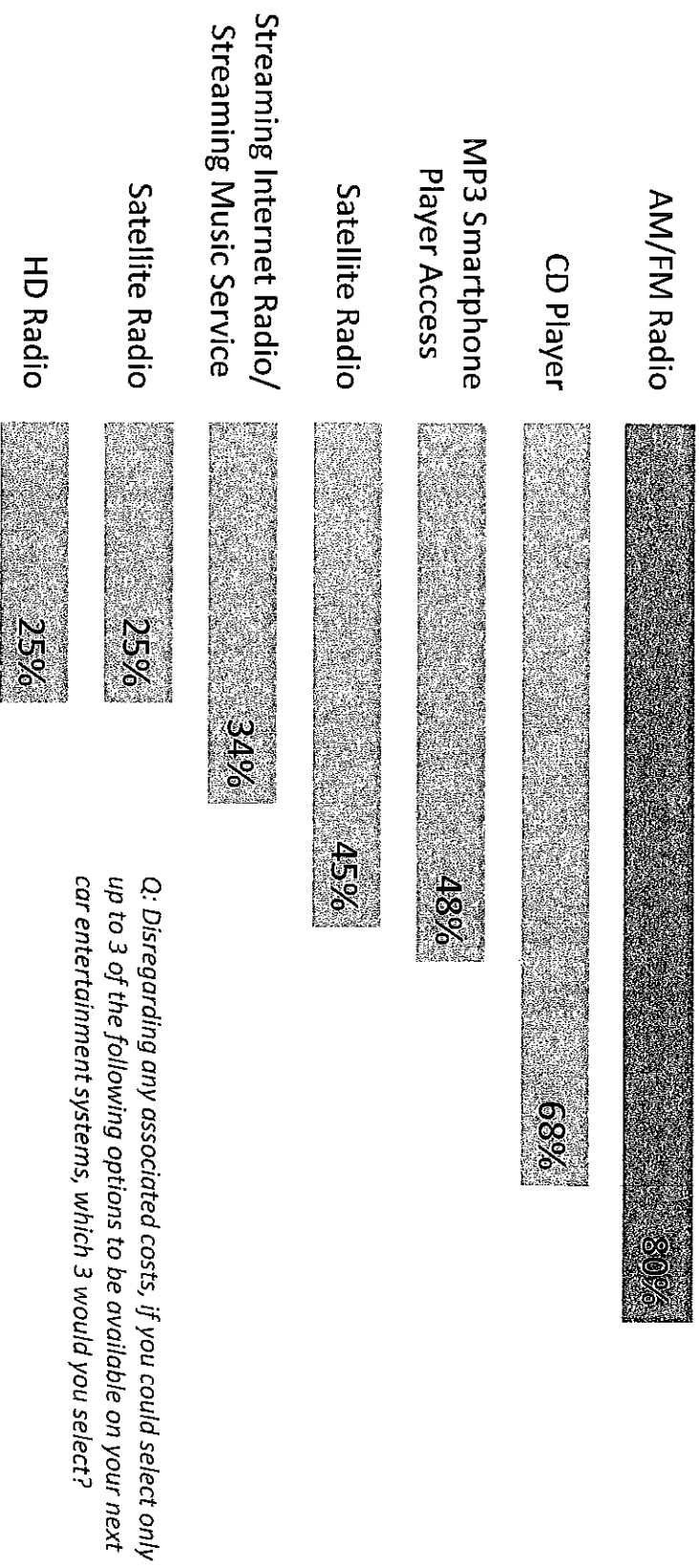


RADIO IN-CAR

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MOST CHOSEN IN-CAR FEATURE



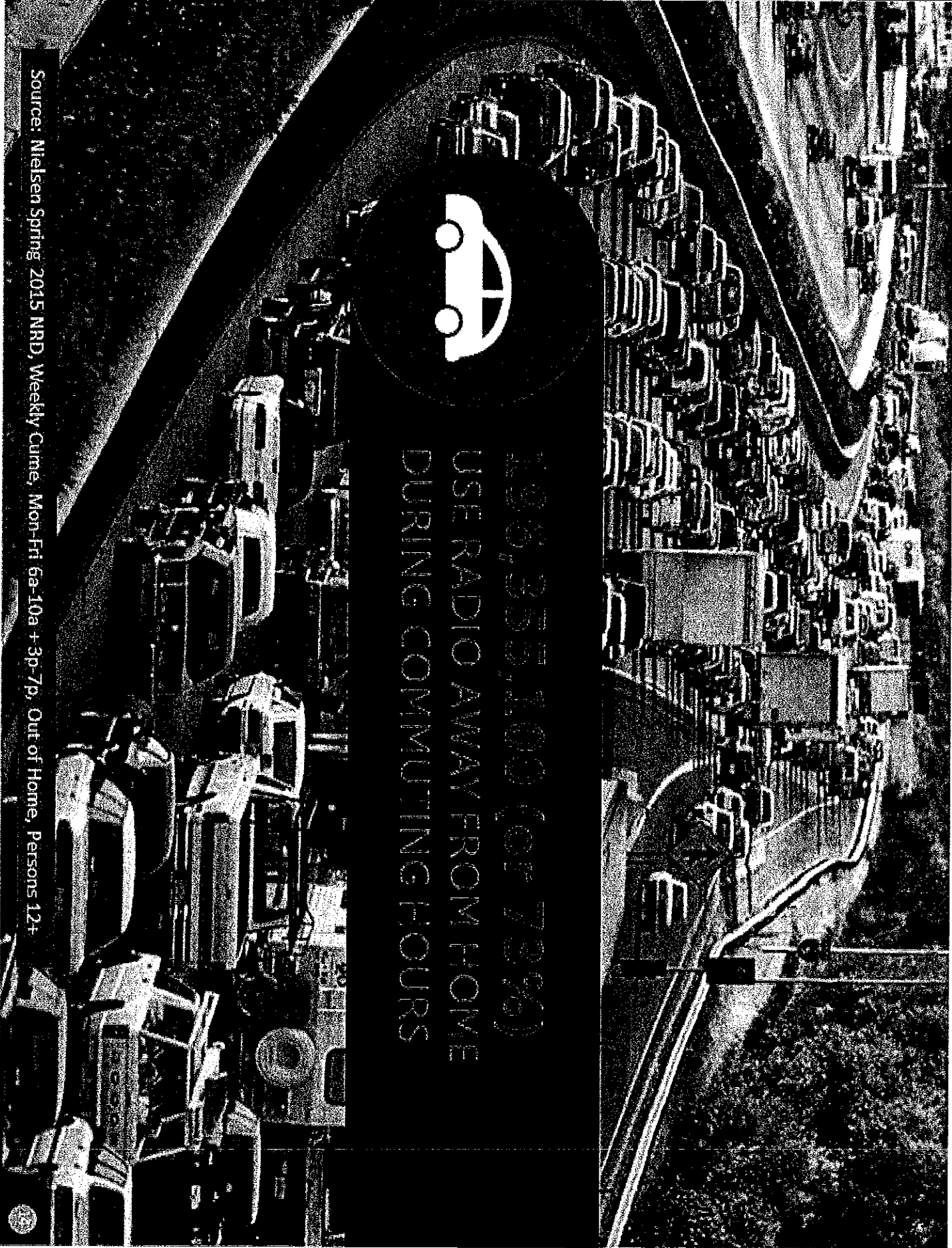
Preference for Entertainment Options in Next Car

Q: Disregarding any associated costs, if you could select only up to 3 of the following options to be available on your next car entertainment systems, which 3 would you select?

Source: Ipsos In-Car Audio Study, February 2015
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1,306,355,400 (OR 72%)
USE RADIO AWAY FROM HOME
DURING COMMUTING HOURS

Source: Nielsen Spring 2015 NRD, Weekly Cume, Mon-Fri 6a-10a + 3p-7p, Out of Home, Persons 12+





OVER 40% OF ALL RADIO LISTENING IS NOW IN CAR

Based on Diary Markets / AQH Persons 12+

P12+	Fall 2011	Fall 2012	Fall 2013	Fall 2014	Fall 2015
In Car					
Percentage	38.5%	38.7%	39.6%	40.2%	41.3%
At Work					
Percentage	21.6%	21.6%	21.1%	20.7%	20.5%
In Home					
Percentage	37.6%	37.4%	36.8%	36.8%	35.9%
Other					
Percentage	2.5%	2.4%	2.6%	2.4%	2.4%

Source: Nielsen National Respondent Level Data / Available Diary Metros only / M-Su 6a-12M / % of AQH audience by location

TIME SPENT LISTENING IN-CAR

Americans average

57% listen

minutes or less

24% listen

minutes or more

**minutes
of audio listening
in the car per day**

Share of Ear Q2 2016

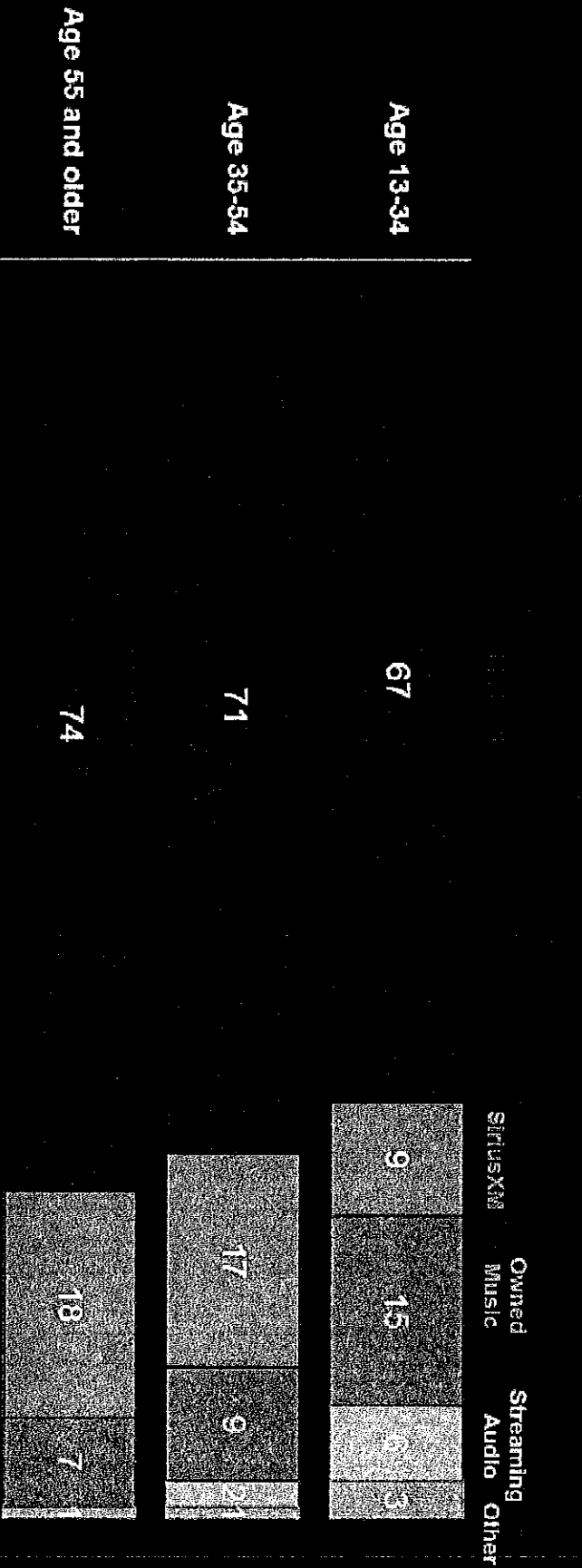
Source: Edison Research: Sharing the Road: The Changing In-Car Audio Space, 2016
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RADIO IN-CAR HAS GREATEST SHARE

In Car Listening by Age



Base: Listen to audio in a car/truck

Share of Ear Q2 2016



Source: Edison Research. Sharing the Road: The Changing In-Car Audio Space, 2016
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RADIO IS THE TOP IN-CAR DEVICE

84% of drivers cite am/fm radio
as their most used in-car
entertainment device

Greater than ...

- CD Player – 56%
- MP3 Player / Owned Digital Music – 38%
- Online Radio – 21%
- Satellite Radio – 19%

*% currently ever
using medium*

Source: The Infinite Dial 2015 – Edison Research/Triton Digital

Base: Age 18+ and driven/ridden in a car last month

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IN-CAR RADIO A MUST FOR MILLENNIALS

77%

#1 used in-car device

among

P18-34

greater than

Owned Digital Music (60%)

CD Player (49%)

Online Radio (36%)

Satellite Radio (14%)



Source: The Infinite Dial 2015 - Edison Research / Triton Digital

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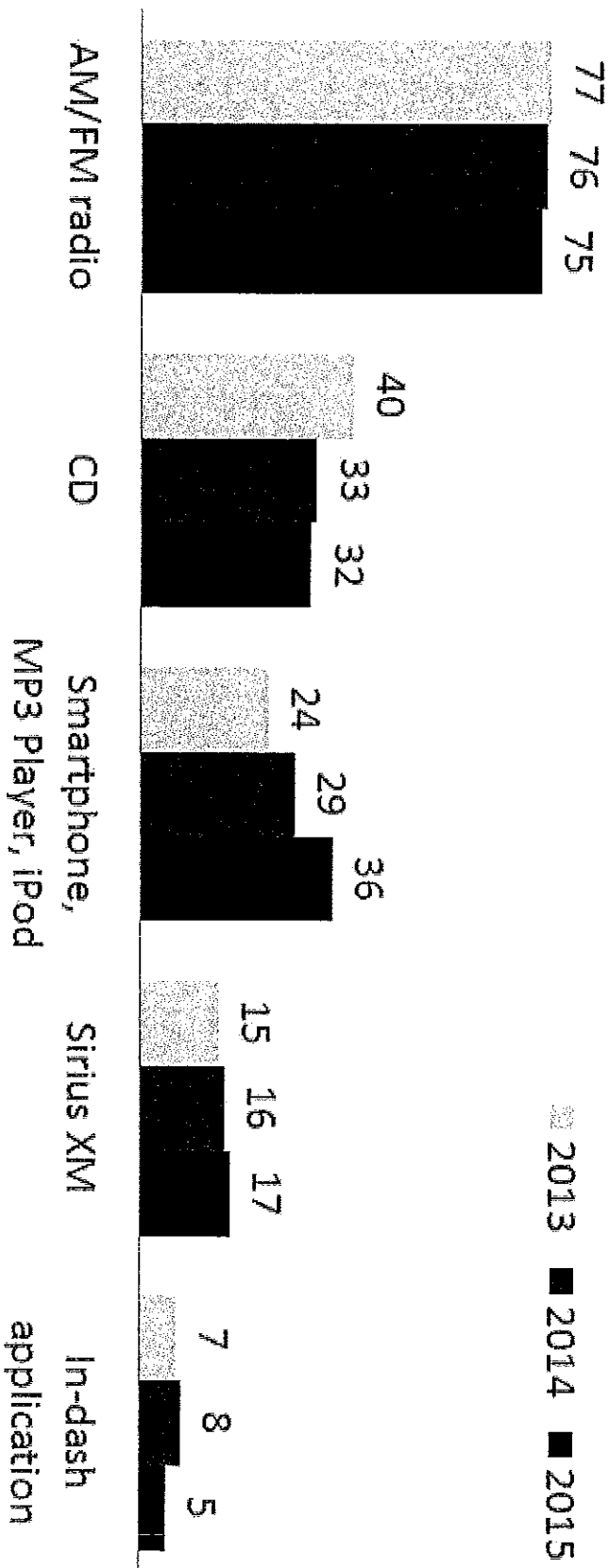
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AM/FM RADIO COMMANDS IN-CAR LISTENING

How people typically listen to music in the car

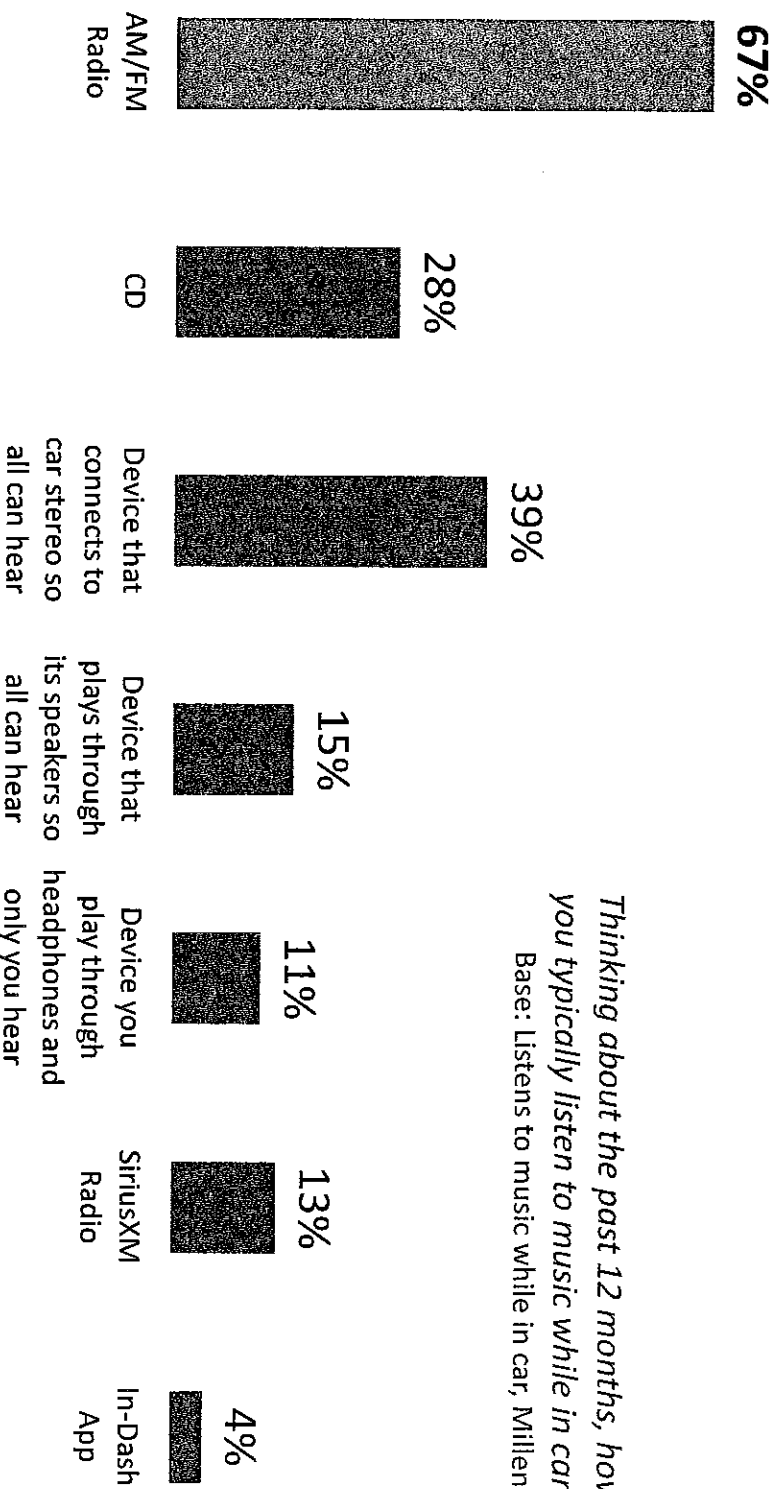


Source: 2015 Nielsen Music 360 Study

Base: Listens to music while in a car - 2013 (2285), 2014 (1786), 2015 (2210)

Thinking about the past 12 months, how do you typically listen to music while in a car?

RADIO OUTRANKS PERSONAL DEVICES FOR MUSIC IN-CAR AMONG MILLENNIALS



Thinking about the past 12 months, how do you typically listen to music while in car?

Base: Listens to music while in car, Millennials

Source: Nielsen Music 360 2015 Report

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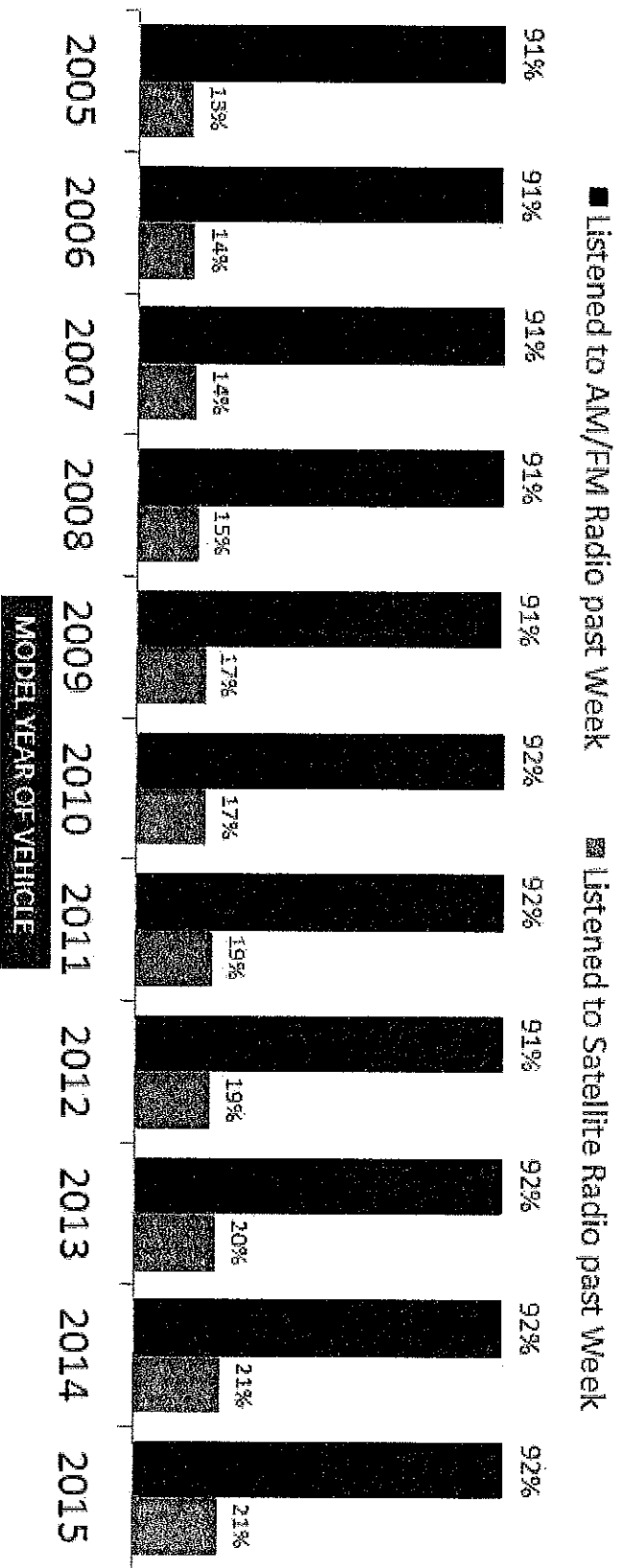
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72% OF ALL NEW CARS HAVE SATELLITE RADIO BUILT IN - BUT ONLY 21% USE IT WEEKLY

Weekly reach of AM/FM and Satellite radio by vehicle model year



EVEN IN NEW CARS, AM/FM STILL RULES THE ROAD

Source: Nielsen Scarborough USA+ RI 2015, Adults 18+, Model Year of owned or leased vehicle, 2015 - 2005
 *Satellite radio penetration among new cars comes from iBiquity

MOST USED IN-CAR AUDIO SOURCE WEEKDAYS

Among those
who spend at
least some
time in a car

93% AM/FM Radio

42% Personal Music

25% Talking on phone

23% Satellite Radio

14% Pandora

9% Other streaming services

7% Podcasts

5% Audio Books

average weekday – multiple answers allowed

Source: Jacobs TechSurvey 12, 2016

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