

Radio's Place in the Media Landscape Part I

Ongoing migration to digital radio platforms documented in new study. Offering the most dramatic snapshot yet of how quickly radio consumption is moving to internet-delivered platforms, nearly half of respondents (46%) to a new Alan Burns/Triton Digital poll say they listen daily to AM/FM radio on a computer. That's significantly higher than the 29% of Americans who said they listened to online radio in the last week in Arbitron & Edison's survey conducted in January and February of this year. The difference in methodologies — Burns/Triton used an online opt-in survey, Arbitron/Edson conducted a national telephone survey — may be as much of a factor as the ongoing shift to online listening. Burns/Triton also report nearly one in four smartphone owners (23%) say they listen to broadcast radio daily on their smartphone. The poll finds radio's smartphone audience is using both station-specific apps and ones offered by aggregators. The percentage of smartphone owners that have downloaded a specific radio station app (22%) is about the same as those who have downloaded the iHeartRadio app (21%). Aggregator TuneIn's app is further down the list, downloaded by 8% of the sample. The study finds nearly one in four (39%) listen weekly to music on their smartphones while one in four do so daily with 17% listening for an hour or more daily. Meanwhile, consumers with in-car internet access are not using radio significantly less — perhaps 7% less, the study suggests. Among the two in ten (19%) that report having internet access in the car, the vast majority (70%) say they listen most to AM/FM radio in the car. The study also calls into question industry theories that Pandora listening takes more time away from recorded music collections than radio. Of those who listen weekly to the pureplay, 28% say they are listening less to CDs, MP3s and records — the same percentage that say they're listening to less radio. But the majority (52%) says they aren't listening less to other music sources or they just don't know. "Radio AQH may be nibbled at by other media but consumers don't sense themselves using it less," consultant Alan Burns says. More than half (55%) say they are listening to radio the same, 30% say more and 21% less.

CBS PHILADELPHIA RAISES OVER \$800K FOR KIDS

WOGL-FM and WIP-AM hosted Radiothons that raised more than \$881,000. The 98.1 WOGL Loves Our Kids Radiothon raised \$658,272 in two days for The Children's Miracle Network. In the past eleven years, 98.1 WOGL has raised \$5,514,604 for Children's Hospital. And, the WIP EYP/City Year Eagles Radiothon raised \$223,150 in two days. All donations raised are split equally between Eagles Youth Partnership and City Year Greater Philadelphia. This was the 12th year of the Eagles Radiothon.

CBS Radio Philadelphia Market Manager Marc Rayfied said, "We get to see first-hand the impact our radio stations have on the community. We are local business operators who feel it's our duty to support fine organizations like CHOP and the Eagles Youth Partnership. Like many, our families have been the beneficiaries of the services they provide, and we are very fortunate to have them in our back yard."

BURNS: "IT'S UP TO YOU TO WIN THE MEDIA BATTLE."

9-27-2012

Last week at the Radio Show in Dallas, Alan Burns and Associates and Triton Digital released results of a poll that included 40,000 people. Burns has condensed the results into a top ten list and concluded, "Radio's future is not in the hands of Pandora or any other technology - it's squarely in the hands of consumers, who will react to what we give, or fail to give, them. Thus ultimately Radio's future is in Radio's hands."

Here is the Top Ten list from the Burns/Triton poll:

1. With consumers, Radio wins by large margins images such as the medium that energizes them; relaxes them; puts them in a better mood; helps them have a good time; feels like a friend; and has honest and believable ads.
2. Television wins images for "annoying ads" and "ads you can skip."
3. Internet services win images for being informative and connecting consumers to other people. Internet and Radio tied for "ads targeted to people like you."
4. Newspapers did not win a single consumer image.
5. Radio is less strongly bonded to listeners under 35. Younger listeners want music control and fewer commercials.
6. There is demand for a cell phone Radio chip. 38% of all consumers, and

43% of under-35s, would be more likely to buy a specific phone if it had a radio tuner in it.

7. The radio usage of consumers who have internet access in their cars is virtually identical to that of consumers without in-car internet.

8. Advertising agency employees are less likely to name Radio, and more likely to name Television, for the positive images consumers hold of radio. They are less likely to come radio daily, and more likely to come a personalizable music stream.

9. However, Radio ranks #1 even among those agency professionals in all its basic areas of strength with consumers, plus it ranks #1 for targetable ads.

10. More consumers - including consumers under 35 - would be “very disappointed” to lose their favorite radio station than to lose Facebook.

Radio Tomorrow



Sample

Triton Digital 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



Daily Media Usage

Use the Internet	84.7%
Watch TV	80.2%
Listen to AM/FM Radio	73.8%
Watch Local TV News	56.3%
Visit Facebook	52.0%
Get News on the Internet	50.7%
Read a Newspaper	35.9%
Listen to Customized Music Stream on the Internet	22.6%

What Medium or Service....

Keeps You Company

Radio	36.6%
TV	30.3%
Internet	16.9%
None	12.0%
Newspaper	4.4%



What Medium or Service....

Comforts You

Radio	40.7%
TV	22.1%
None	20.6%
Internet	12.2%
Newspaper	4.6%



What Medium or Service....

Helps You Have a Good Time

Radio	41.0%
TV	21.1%
Internet	19.0%
None	15.0%
Newspaper	4.1%



What Medium or Service....

Helps You Relax

Radio	46.8%
TV	25.4%
Internet	12.4%
None	9.2%
Newspaper	6.3%

What Medium or Service....

Energizes You

Radio	49.1%
None	23.6%
TV	12.3%
Internet	10.3%
Newspaper	4.7%

What Medium or Service....

Improves Your Mood

Radio	57.4%
TV	16.0%
None	11.4%
Internet	11.2%
Newspaper	4.1%

Listening to Radio More, Less or the Same?

More	30.0%
Same	55.1%
Less	20.5%
Net	+9.5%

Listening to Radio More, Less or the Same?

Total	+ 9.5%
Shoppers	+11.9%
Under 18	+18.0%
18-34	+ 8.5%
35-54	+12.5%
55+	+ 6.1%



Streaming Music Usage on Smartphones Growing

Listening to All Music Sources – Radio streams, Pandora, Etc.

Weekly	39.3%
Daily	25.4%
1+Hour Daily	16.5%



AM/FM Radio on Other Platforms

	<u>Daily</u>	<u>Hour or More</u>
On Computer (incl laptop/tablet)	46.4%	36.2%
On Smartphone * of Smartphone owners	23.0%*	18.1%

Would Listen to Radio More If...

Absolutely + Very Likely	Total	< 18	18-34	35-54	55+
It Had Fewer Commercials	61.4%				
You Can Skip Songs You Don't Like	54.6%	64.1%	65.1%	54.7%	43.8%
You Can Control the Music	56.1%	61.5%	63.9%	56.5%	47.8%
Watch Videos of Songs as They Played	33.5%				
Favorite Personality Was on Longer/More Often	34.7%				
There was more/better News and Information	35.5%				
If You Could Rewind Commercials	21.0%				

Which Are Important Parts of Your Community?

TV Stations	78.7%
Radio Stations	78.6%
Newspaper	67.6%
Internet Sites	59.3%

**Ever Purchased an Item or Shopped at a Location
You Heard About First on...**

	<u>Yes %</u>
TV	69.2%
Radio	58.8%
Website	49.0%
Newspaper	45.6%
Facebook	22.2%

What Medium or Service....

Has Ads That are Honest and Believable

Radio	23.3%
TV	18.9%
Newspaper	15.1%
Internet	9.5%
(None	33.2%)

Show This to Your Agencies!

Total Agreement with the Statement	Total	<18	18-34	35-54	55+
I would be very disappointed if my <u>favorite radio station</u> went away	61.6%	60.0%	62.0%	62.7%	59.6%
I would be very disappointed if Facebook went away	44.7%	53.3%	54.2%	44.7%	33.9%



Eric & Kathy WTMX/Chicago

After 36 hours, you helped us raise **\$1,722,153.36** for the **Ann & Robert H. Lurie Children's Hospital of Chicago**! Check out all of pictures in our **Photo Gallery** and don't miss any of the **Radiothon 2012 Videos**

Here are some thoughts about how broadcast radio might plan its next set of moves:

- This isn't about starting a personalized music service on your website. Pandora, Apple, and Spotify can and will do it better.
- It *is* about thinking how radio brands can provide a unique and welcome service that is different from what they get from pure-plays.
- This is yet another call for broadcasters to clean up and improve the streaming experience, whether it is cleaner ad insertion, less buffering, more commercial-free programming, higher bit rates, or other solutions that make radio brands more competitive – or at least on an equal footing in a streaming environment.

- Programmers need to be incentivized for their streams *and* they need to start monitoring them for quality and reliability.

And that leads to a series of questions that need to be asked at **The Radio Show** and other conferences, at company meetings, and inside every station and cluster in America:

1. What are radio's defining differences – today and down the road? What can a local FM radio station offer that consumers cannot get from a pure-play? What is broadcast radio's "why?"
2. What role does a personality/concierge play in the consumption of music – and how can radio brands leverage that advantage?
3. How can a local radio brand better cater to advertiser needs and produce results in ways that global pure-plays cannot?
4. How can radio better serve the *emotional needs* of the audience by providing programming, services, and even companionship that goes beyond what a pure-play can offer?
5. How can radio offer better *experiences* to its audience – unique opportunities to interface with the music and those who make it?
6. And finally, how can radio improve the overall *CX* – the customer experience – whether it's answering the phones, social media acknowledgement, or showing up for local civic and charitable events?

Lee Clow is one of the great creative minds in last 25-35 years

From: Lee Clow [mailto:lee@mediaartslab.com]

Sent: Wednesday, June 17, 2009 3:48 PM

To: McCurdy, Bob

Subject: Re: Mag Article

Hey, Bob.

Radio is:

It's intimate like Twitter.

It's conversational like Facebook.

It can produce humor and outrageousness (albeit in your mind) like YouTube.

It can be measured. And it can be cost effective. Seems like a no-brainer.

By [Carl Marcucci](#) on Sep, 18 2012 with [Comments 0](#)

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Arbitron's September 2012 RADAR 114 report shows radio's audience increased slightly year over year by 249,000 persons aged 12+, representing nearly 93% of the population.

Young radio listeners were largely responsible for the YOY increase, with Adults aged 18-34 showing the largest gain in weekly listeners, adding more than 800,000. Persons aged 12-17 increased slightly also. Radio continues to reach 91% of this demo. Adults 18-49 and 25-54 showed YOY declines in weekly radio listening, largely due to shifts in the composition of the population versus last year. Radio attracts 126 million adults aged 18-49 and 119.6 million adults 25-54 on a weekly basis.

Radio's diverse listener base saw a big jump in the September 2012 RADAR study compared to the September 2011 study. The number of Hispanic weekly radio listeners saw impressive increases across most demographic segments.

Radio's Hispanic audience aged 12+ grew by more than 2.5 million versus the September 2011 report. Radio reaches nearly 95% of Hispanics aged 12+. Hispanic Teens aged 12-17 showed an impressive increase over the past year, rising by more than 300,000 weekly listeners.

The Black (non-Hispanic) audience also show significant gains. Radio among Black (non-Hispanic) listeners aged 12+ grew by more than 975,000 versus September 2011. Radio reaches 93% of the Black (non-Hispanic) population. Black (non-Hispanic) adults aged 18-34 showed the most gains, adding nearly half a million average weekly listeners versus last year.

The adult 25 to 54 Black (non-Hispanic) demo also showed impressive gains with an increase of more than 280,000 weekly listeners.

More than 95% of adults aged 25-54 with a household income of \$75K or more and a college degree tune in to radio on a weekly basis, that's 25.6 million listeners in this

demographic. Also, nearly 69.7 million, or 94%, of Adults 18-49 with a household income of \$75K or more tune into radio on a weekly basis.

Radio's so-called "Money Demo" is also its biggest user. A fresh analysis of national listening habits finds nearly one-in-five radio listeners (18+) are heavy users of the medium. Heavy users are defined as spending 180 minutes a day or more during a typical day — or 21 hours or more per week — tuned to the FM/AM dial. While young adults (18-24) make up 11% of heavy radio users, in the 25-54 demo sought out by advertisers, three-fifths are categorized as heavy radio listeners. The report also shows there are some regional differences. The South makes up 31% of radio's heavy users, followed by the West (28%), Midwest (21%) and Northeast (20%). Along racial lines, whites under-perform the overall population but blacks and Hispanics both outperform. Research Director Inc.'s analysis of The Media Audit data also shows that in PPM-measured markets, P1 listeners represent 20% of a station's cume and 63% of a station's AQH audience. The results were laid over the top of The Media Audit's qualitative data to show such things as frequent fast-food consumers are 42% more likely to be heavy radio users. And mattress shoppers are 24% more likely to be heavy radio users. "We have always known that heavy users of any media product are important to that medium's long-term success," Research Director president Charlie Sislen says. "Now we can show — in great detail — what kinds of consumers these people are."

[Canadians up TV watching, radio listening and downloading from the Internet](#)

September 4, 2012. 12:45 pm • Section: [Digital Life](#), [STAFF](#)

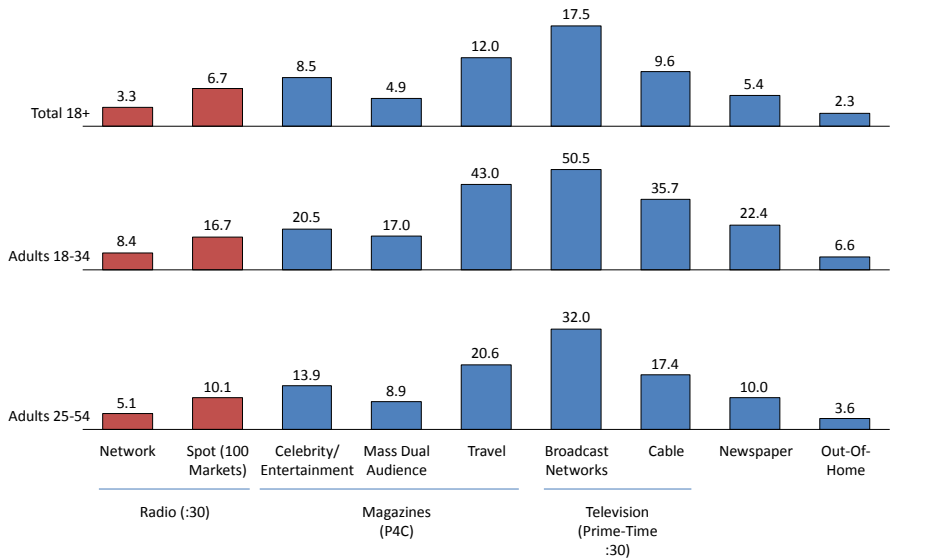
- *Posted on Jul 28, 2012*

Predictions about the death of traditional television and radio are greatly exaggerated — at least in Canada where consumers are spending more time watching TV and listening to the radio .

According to the Canadian Radio-television and Telecommunications Commission's annual Communications Monitoring Report released today, TV watching was up slightly at 28.5 hours a week in 2011 from 28 hours a week in 2010 and radio listening crept up a fraction, to 17.7 hours a week from 17.6.

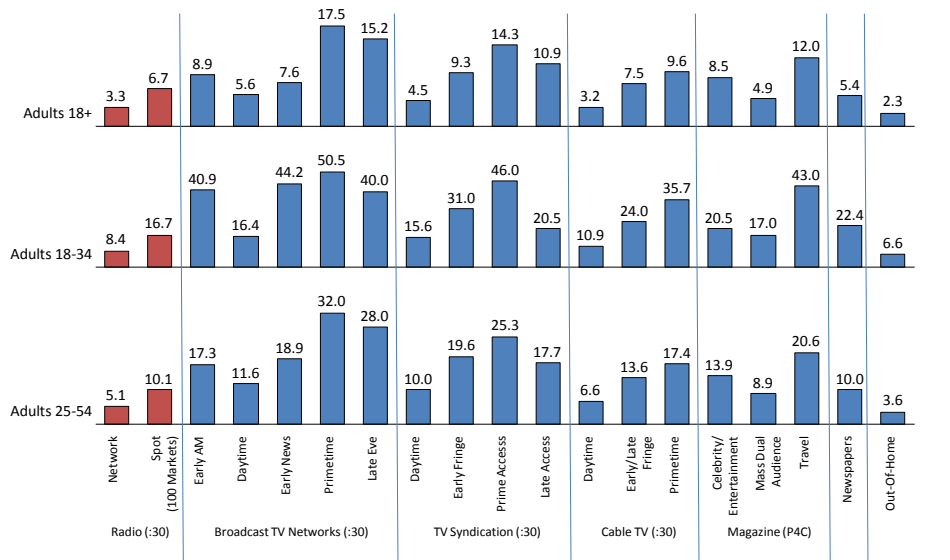
But all the same, Canadians are using the Internet more, upping the amount they download every month — whether it's watching movies or video chatting with the grandchildren. Last year Canadians downloaded more than 20 per cent more from the Internet every month than they did in 2010.

Typical CPMs By Medium Dollars



Source: Media Dynamics, 2011
 Note: TV figures are based on upfront estimates. Newspaper figures for B&W mag. size for top 40 market papers. OOH figures for 30-sheet poster in top 50 markets.

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Source: Media Dynamics, 2011
 Note: TV figures are based on upfront estimates. Newspaper figures for B&W mag. size for top 40 market papers. OOH figures for 30-sheet poster in top 50 markets.

The Social Network Called Radio is **85%** Bigger Than the Social Network Called Facebook Among Adults 18-34

On a typical day in the USA, of people 18-34:

- **85%** more will use Radio than will go to facebook (49.0 vs 26.4 million)
- **100%** more will use Radio than will go to Google Search (49.0 vs 24.3 million)
- **215%** more will use Radio than will go to Youtube (49.0 vs 15.6 million)
- **1430%** more will use Radio than will go to Twitter (49.0 vs 3.2 million)

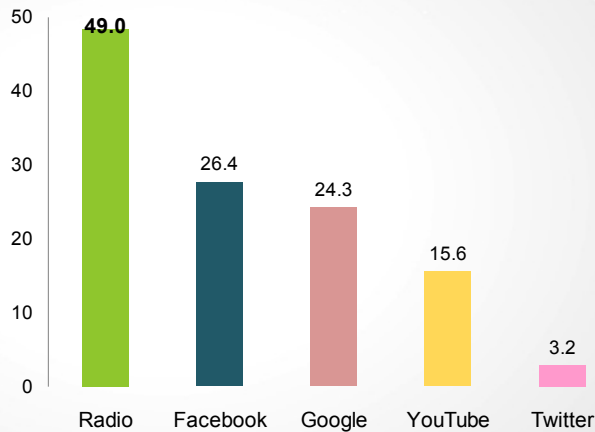
*Every day, about **70%** of people 18-34 invite Local Radio to be a major part of their lives. Let Radio connect you with our listeners.*

Sources: comScore Inc Ratings for April-June 2012 Average Unique Visitors 18-34; RADA June 2012, persons 18-34, 6A - Mid



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Persons 18-34 in millions



Source: comScore Inc Ratings April-June 2012, RADAR June 2012, P18-34, 6A-12M

The Social Network Called Radio is **130%** Bigger Than the Social Network Called Facebook Among Adults 25-54

On a typical day in the USA, of people 25-54:

- **130%** more will use Radio than will go to facebook (92.1 vs 40.1 million)
- **135%** more will use Radio than will go to Google Search (92.1vs 39.0 million)
- **400%** more will use Radio than will go to Youtube (92.1 vs 18.5 million)
- **3070%** more will use Radio than will go to Twitter (92.1 vs 3.0 million)

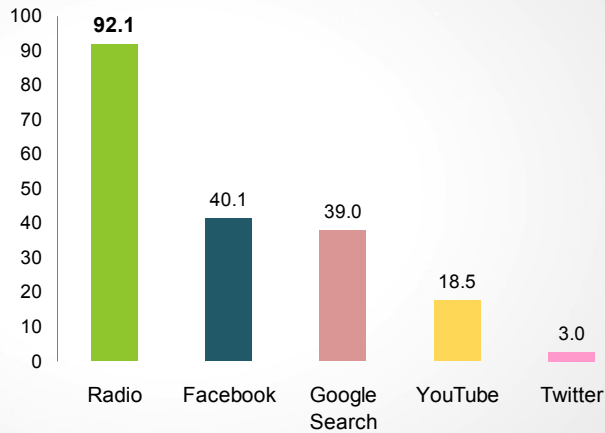
Every day, 73% of people 25-54 invite Local Radio to be a major part of their lives. Let Radio connect you with our listeners.

Sources: comScore Inc Ratings for April-June 2012, Average Daily Unique Visitors 25-54; RADAR June 2012, persons 25-54, 6A-Mid



On a typical day in the USA, of people 25-54:

- **130%** more will use Radio than will go to Facebook
- **135%** more will use Radio than will go to Google Search
- **400%** more will use Radio than will go to YouTube
- **3070%** more will use Radio than will go to Twitter



Persons 25-54 in millions



Source: comScore Inc Ratings for April-June 2012, Average Daily Unique Visitors 25-54; RADAR June 2012, P25-54, 6A-12M

The Social Network Called Radio is **180%** Bigger Than the Social Network Called Facebook Among People 12+

On a typical day in the USA, of people 12+:

- **180%** more will use Radio than will go to facebook (179.9 vs 64.6 million)
- **200%** more will use Radio than will go to Google Search (179.9 vs 60.6 million)
- **455%** more will use Radio than will go to Youtube (179.9 vs 32.5 million)
- **2000%** more will use Radio than will go to Twitter (179.9 vs 6.0 million)

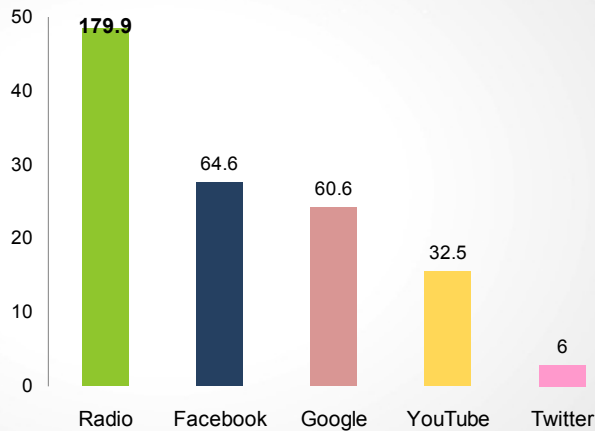
*Every day, about **70%** of people 12+ invite Local Radio to be a major part of their lives. Let Radio connect you with our listeners.*

Sources: comScore Inc Ratings for April-June 2012, Average Daily Unique Visitors 12+; RADAR June 2012, persons 12+, M-Su 6A-Mid;



On a typical day in the USA, of people 12+:

- **180%** more will use Radio than will go to Facebook
- **200%** more will use Radio than will go to Google Search
- **455%** more will use Radio than will go to YouTube
- **2000%** more will use Radio than will go to Twitter



Persons 12+ in millions



Source: comScore Inc Ratings for April-May 2012, Average Daily Unique Visitors 12+, RADAR June 2012, P12+, 6A-12M

Clearly, Dunkin' is pushing into mobile and social media. How is your marketing strategy for 2012 and 2013 changing?

A:John Costello Dunkin CMO: Dunkin' is fortunate, because we're still getting a strong ROI on traditional media like television, radio, outdoor and in-store POP. We're

somewhat different than some other marketers who shifted into interactive marketing because it no longer works. We conduct fairly sophisticated analyses across all media, and then adjust our plans based on that ROI. So while interactive, mobile and social are growing at a faster rate than traditional marketing tools, they're earning their way into the marketing plan through the ROI that they provide. You won't see a wholesale shift to those media. Traditional media still represent over half of our total marketing budget.

The Whole Story: Moms, Radio And Recency

by [Mike Bloxham](#), 6 hours ago

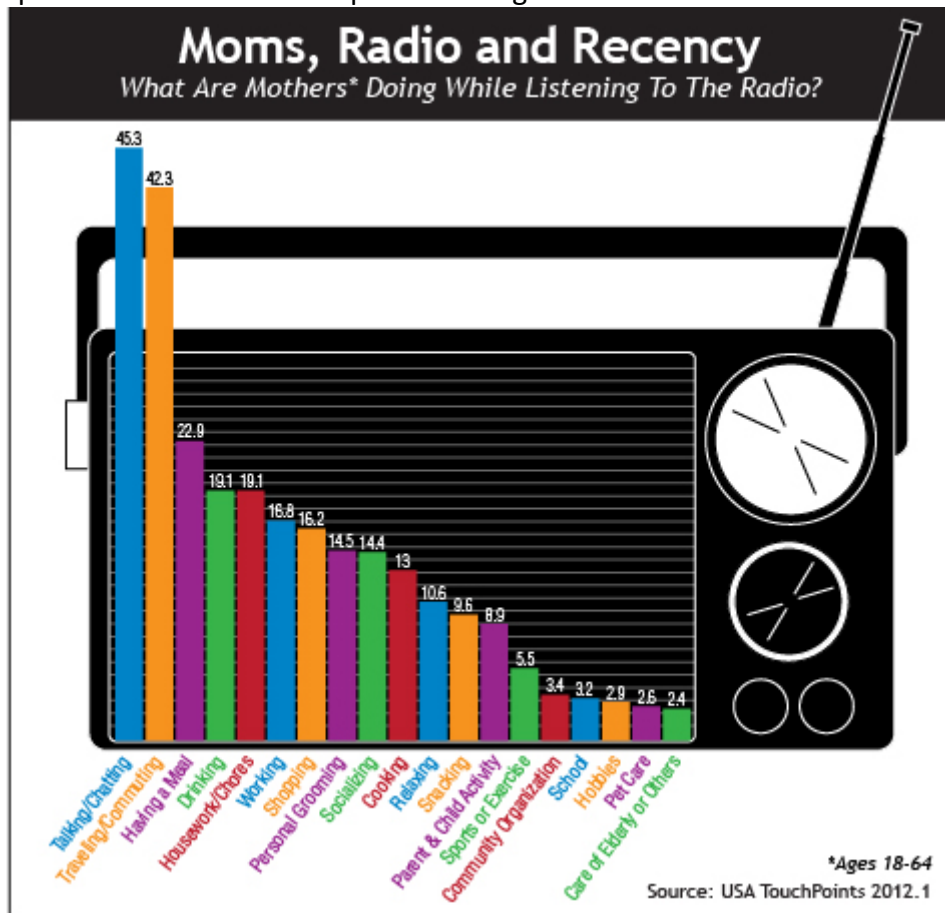
Radio has been such a major part of our lives for so long that it's easy to take it for granted. This USA TouchPoints analysis looks at how exposure to radio correlates with a range of life activities throughout an average day of American moms. The findings tell a long tail indeed.

The cross-section of activities accompanied by radio listening by at least some moms illustrates the extent to which daily life is led to its own soundtrack. Whether talking and chatting with others, commuting, eating, working, doing housework, radio has a presence.

This ubiquity of location and social setting is perhaps matched only by mobile media, where it is almost certainly more readily expected to be found. This proximity to such an array of activities provides a platform for leveraging the recency effect in relation to things like shopping, time with children etc.

This analysis clearly supports other research that points to the correlation between time

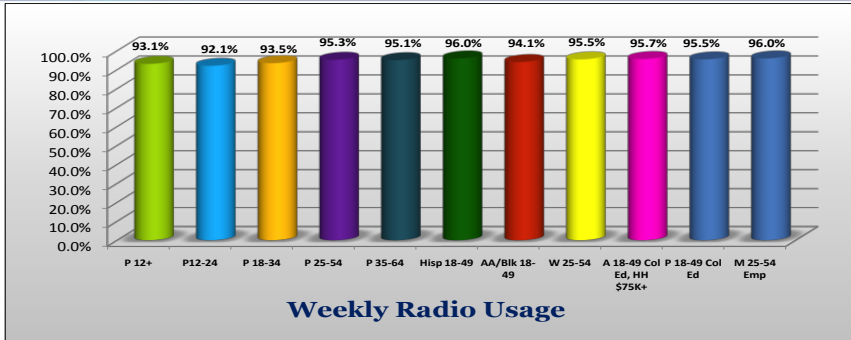
spent in the car and time spent listening to the radio.



An analysis of radio listening data from Arbitron shows the medium is holding up very well, particularly over the past 3 years in spite of digital audio alternatives. From 2009 to 2011, weekly reach is over 95% for advertisers' most important demographics (A18-49 and A25-54), and usage is over 2 hours per day.

Nearly Everyone Uses Radio. In Real Time. Every Week.

Radio reaches over 90% of virtually every segment of the population. That has been true year after year and remains true today.

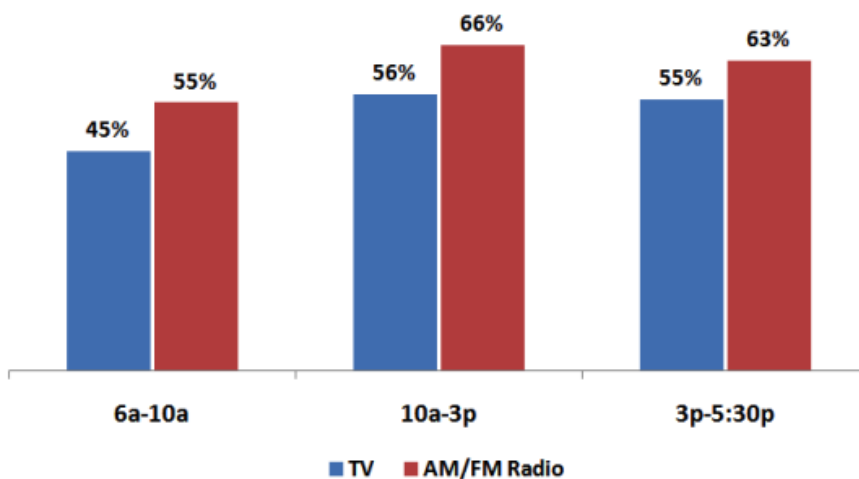


Source: RADAR December 2011

KATZ RADIO GROUP

Radio is #1 reaching medium from 6a-5:30p among Employed Adults 18-34

% Weekly Reach by Medium Mon-Fri

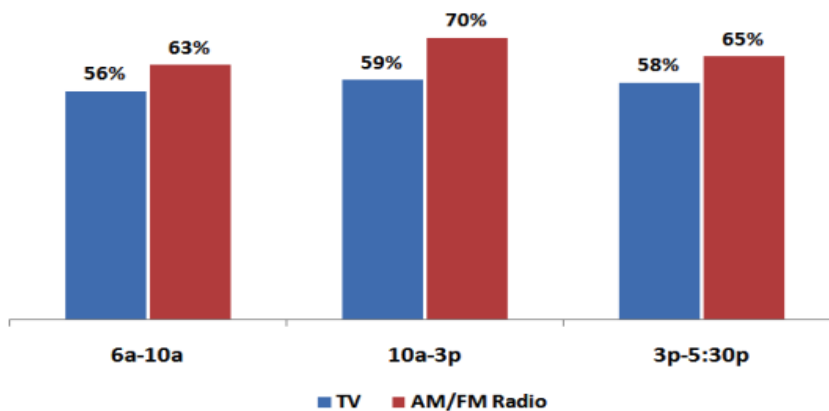


TV includes live and time-shifted

Source: 2012 USA TouchPoints

Radio is #1 reaching medium from 6a-5:30p among Employed Adults 25-54

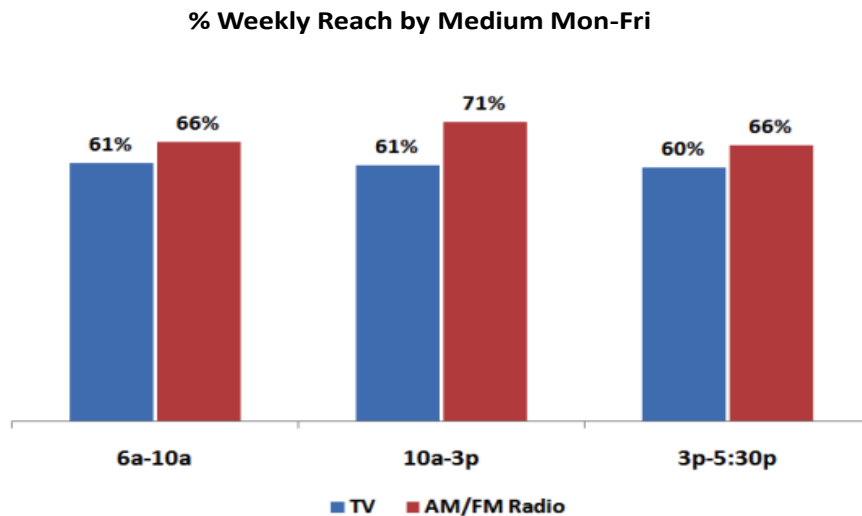
% Weekly Reach by Medium Mon-Fri



TV includes live and time-shifted

Source: 2012 USA TouchPoints

Radio is #1 reaching medium from 6a-5:30p among Employed Adults 35-54



TV includes live and time-shifted

Source: 2012 USA TouchPoints

(COMMENT: THIS IS IMPORTANT DUE TO BOTH THE AUTHOR AND THE RESEARCH. MIKE BLOXHAM IS A MUCH RESPECTED RESEARCHER. KEY TAKEAWAY HERE IS THAT RADIO IS ABLE TO TARGET-IN-TIME AND REACH LISTENERS WHEN THEY ARE CLOSE TO PURCHASE- RECENCY AND PROPINQUITY)

7/12 The Whole Story: Breakfast Media

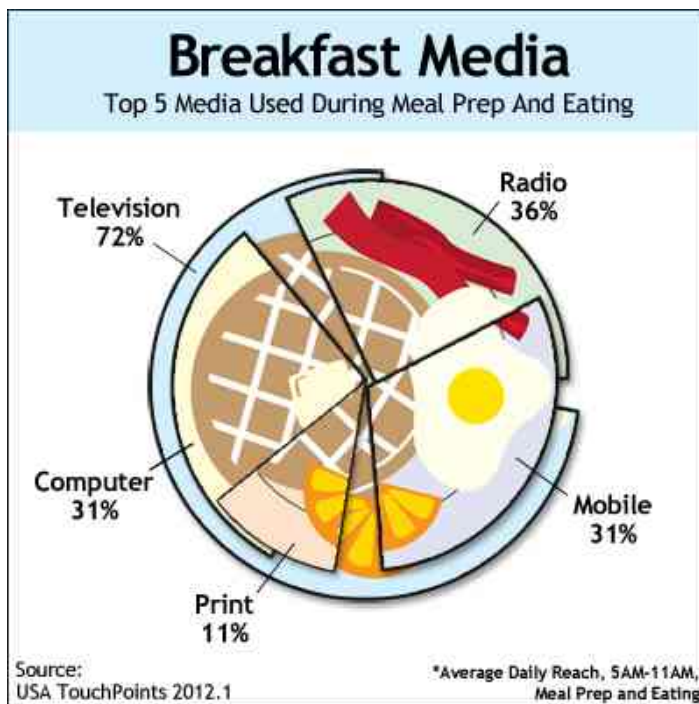
by [Mike Bloxham](#)

Breakfast in America has changed beyond recognition since the '50s and '60s. This USA TouchPoints analysis (see below) shows the reach of different media while people are preparing or eating a meal between 5:00 and 11:00 a.m. throughout the week.

What, where and when we eat breakfast today could not be more different from the domestic idyll of yesteryear. Breakfast is no longer confined to the home and it certainly isn't a whole family affair. More often it is a meal eaten in shifts by different family members as they pass through the

kitchen. Others eat at work or on the way there. Starbucks is as much a part of the breakfast landscape as the cereal box and the desk is as important as the breakfast table.

With that in mind we looked at the 5:00 to 11:00 a.m. window and correlated media use with when people reported preparing or eating a meal. The chart below illustrates the top five media as expressed in terms of daily reach (including weekdays and weekends).



- The mix of media and their reach is most likely heavily influenced by the range of locations in which people eat breakfast. From the more traditional home setting to the office, the coffee shop or even in the car, each provides a different media microclimate of its own where different media hierarchies prevail with corresponding opportunities to deliver contextual relevant messages to a more receptive (food-oriented) consumer.
- TV dominates the home, which will be especially relevant for weekend breakfasts but also for weekdays as people catch news, weather and lifestyle programs before leaving the house. Kids TV will also play a role here. This dominance means that TV delivers 72% of people who are preparing or eating breakfast.

- Radio, Computer and Mobile Phones all come in a distant second to TV but with Radio (36% Reach) just ahead of Computer (31%) and Mobile Phone (31%). While all of these are strongly associated with media use while working and can probably be linked to breakfast consumption at the workplace – whether in the communal eating area or as a bowl of cereal at the desk – Radio also benefits from being strong in the home and particularly in the car for those taking advantage of the drive through QSRs, Coffee Shops etc.
- Finally, Print with 11% Reach of this group maintains a respectable showing. As a medium that requires more direct attention than some others and much of which is news oriented, it is well-suited as a breakfast medium – particularly in situations where the reader is relatively undistracted and able to absorb editorial and advertising.

Data From Alan Burns Study titled, “Here She Comes 2012”

(COMMENT: THE KEY TO THIS ARTICLE IS THE TITLE. WE MUST COMMUNICATE THIS FAR AND WIDE AND CORRECT THE INCORRECT PERCEPTION THAT LISTENERSHIP IS DECREASING)

Survey: radio listening isn’t decreasing, it’s just shifting devices. From movies to TV to books, products enjoy increased consumption when they become available in more places. New data from a national survey of female radio listeners aged 15-54 shows a similar scenario for radio. While self-reported *cume* and Time Spent Listening to broadcast radio on *an-over-the-air receiver* fell from last year’s level, both metrics rose for listening to broadcast streams online and on cell phones. The online study conducted by Alan Burns and Associates in May among a sample of 2,010 women concludes that radio listening isn’t decreasing, it’s just shifting devices. Listening to radio on cell phones is becoming significant with 13% of women reporting listening to AM/FM radio on their cell phone virtually every day, up from 8% last year. One in four listen daily to broadcast radio online, the same number that listen daily to online custom music streams. Seven in ten say they tune in daily via an over-the air receiver. On a weekly basis, listening to radio on a cell phone nearly doubled from 15% to 26%

while usage of broadcast streams via computer or laptop rose from 34% to 43% and weekly over-the-air tuning declined from 95% to 87%.

Alan Burns Study below:



Sample

Women 15-54
AC & Top 40 Cumers
Age Proportionate to Combined Cumers

N=2,010

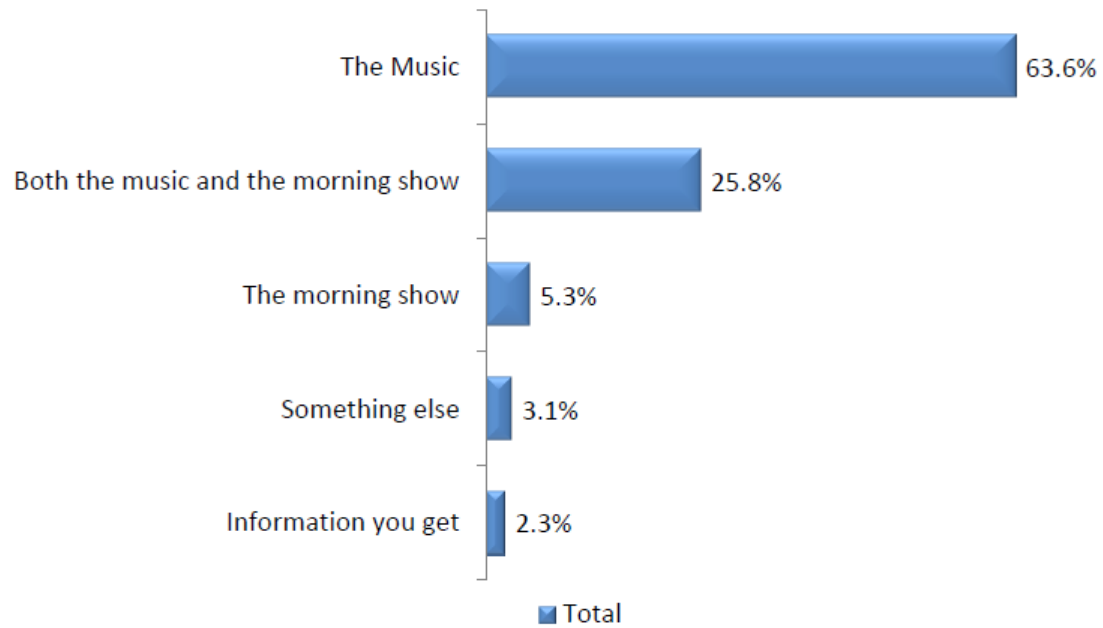
Interviewed May 2012
Online via SSI National Panel

(COMMENT: IN THE SLIDE BELOW, RADIO, A 100 YEAR OLD MEDIUM IS OUTPERFORMING A NEWDIGITAL DARLING, TWITTER)

Usage Compared to a Year or Two Ago

"More" minus "Less"	Net
Facebook	+18.0%
Internet Music Streaming	+15.5%
Radio (Air or Online)	+6.7%
Twitter	+3.8%

What is the Main Reason You Listen to Your Favorite Radio Station?



©2012 Alan Burns & Associates

Extremely important slide:

Weekly/Daily Media Usage

	Weekly %		Daily %
	2011	2012	2012
Listen to Radio on a Radio	94.6%	86.6%	68.7%
Listen to Custom Music Streams Online	39.2%	48.8%	25.8%
Listen to Radio on a Cell Phone	15.4%	26.2%	13.4%
Listen to Online Stream of a Radio	33.9%	42.7%	24.8%

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(COMMENT: SLIDE BELOW- WHILE LISTENING TO THE RADIO IS DOWN 15 MINUTES FROM LAST YEAR LISTENING TO RADIO ONLINE OR ON A CELL IS UP AN HOUR EACH)

Media Usage

Time Spent Average Quarter Hour

	2011	2012
	TSL	TSL
Watch Television	3:30	3:30
Use Facebook	1:45	2:00
Listen to AM/FM Stations on a Radio	2:00	1:45
Listen to Online Stream of AM/FM Station	:30	1:30
Listen to AM or FM Radio on Your Cell	:15	1:15



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(COMMENT: SLIDE BELOW- 13% OF RESPONDENTS TO THE BURNS SURVEY INDICATED THE LISTEN TO RADIO ON THEIR CELL DAILY)

Cell Phone Listening Becoming Significant

- Ever downloaded any app 89.9%
- Ever downloaded radio station app 49.3%
- Listens to radio on cell weekly+ 26.2%
- Listen to radio on cell ~ daily 13.4%
- TSL by daily cell listeners 1:15

Of those who've ever downloaded any app. All others = total sample.

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COMMENT: SLIDE BELOW- OVERALL RADIO LISTENING IS UP IN SPITE OF LISTENING TO RADIO ON A RADIO BEING DOWN A BIT)

Radio Listening is Not Decreasing It's Just Shifting Devices...

Daily Listening to AM/FM Radio

	2011	2012	
On a Radio	79.6%	68.7%	
	<u>X8qh</u>	<u>X7qh</u>	
	= 637	= 481	
<hr/>			
Online	19.3%	24.8%	
	<u>x2qh</u>	<u>x6qh</u>	
	= 39	= 149	
<hr/>			
On a Cell Phone	8.2%	13.4%	
	<u>x1qh</u>	<u>x5qh</u>	
	= 8	= 68	
<hr/>			
Totals	= 684	= 697	<u>up 1.9%</u>

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The Radio medium is Rock Solid:

(COMMENT: RADIO'S AUDIENCE CONTINUES TO REMAIN STRONG, REACHING EVERY AMERICAN REGARDLESS OF RACE ACCORDING TO THE RADAR JUNE 2012 REPORT)

242.1 million persons aged 12 and older tune to radio each week

COLUMBIA, MD; June 12, 2012—Arbitron Inc. (NYSE: ARB) announced today highlights from its June 2012 RADAR® 113 National Radio Listening Report. **The report shows radio's audience increased slightly year over year**

by 590,000 persons aged 12 and older, representing nearly 93% of the population.

In addition to increasing its audience of persons aged 12 and older, young radio listeners also increased slightly with persons aged 12 to 17 at 22.8 million weekly listeners. Adults aged 18 to 34 showed the largest increase year over year, adding 845,000 weekly radio listeners. Adults aged 18 to 49 and Adults aged 25-54 showed year over year declines in weekly radio listening. Radio attracts 126.3 million adults aged 18 to 49 and 119.9 million adults aged 25 to 54 on a weekly basis.

Radio's Diversity

Radio's diverse listener base saw a big jump in the June 2012 RADAR study compared to the June 2011 study. The number of Black (non-Hispanic) and Hispanic weekly radio listeners saw impressive increases across most demographic segments.

- The June 2012 RADAR report shows a significant increase in Hispanic weekly listeners. Radio's Hispanic audience aged 12 and older grew by more than 2.5 million versus the June 2011 report. Radio reaches nearly 95% of Hispanics aged 12 and older.
- Hispanic Adults aged 25 to 54 increased the most over the past year, adding more than 1.8 million weekly listeners.
- Black (non-Hispanic) listeners also grew year over year, gaining 1 million weekly listeners aged 12 and older. Radio reaches approximately 93% of the Black (non-Hispanic) population.

Radio Delivers Affluent, Educated Adults

The June 2012 RADAR illustrates radio's ability to attract affluent, educated consumers. More than 95% of adults aged 18 to 49 with a household income of \$75K or more and a college degree tune in to radio on a weekly basis, that's 22.5 million listeners in this demographic. Also, nearly 34 million, or 93%, of Adults aged 18 to 34 with a household income of \$75K or more tune into radio on a weekly basis.

The RADAR June 2012 Report includes data from all 48 Arbitron PPM™ markets. The survey dates for RADAR 113 were from March 31, 2011 to March 28, 2012.

(COMMENT: ONE WAY TO VIEW THE 3 MAJOR MEDIUMS)

TV is America's hobby: If you do anything for 4 hrs/day, it is your real hobby, not something else you might do a couple of times/week

Radio America's companion: sharing the same moment in time with another living breathing human being....being connected to the outside world. Allows you to be alone without being lonely

Internet: "manage my life box"

Radio very easy to use. "Easy" will always win. Just turn on the button and its there. Thumbing up or down and creating your own playlist is often not as satisfying as a curated station- it is just not worth the effort to a lot of people

(COMMENT: MEANS SEVERAL THINGS. WE NEED TO POSITION THE MEDIUM MORE AGESSIVELY WITH KEY DECISION MAKES THAN EVER BEFORE. SECOND, WE NEED TO BE CONVERSANT WITH HOW PLANNERS CHANNEL PLAN. BE FAMILIAR WITH THE CHANNEL PLANNING TAB OF THE PRIMER)

Ad Industry Media Options Explode: From 8 in The 1970s To 100+ Today

"In the 1970s, there were eight choices," according to Patrick Quinn, founder and CEO of PQ Media. "Today there are more than 100, and 17 from mobile alone," he added.

Quinn said that fragmentation of options, and the problems it has caused in manpower, workflow, thinking and comparing media options, is the No. 1 challenge cited by PQ Media's panel of industry leaders that it surveys

periodically. But Radio continues to be a very important part of people's lives:

(COMMENT: RADIO IS A GREAT WAY TO REACH ON-THE-GO MOM'S AS THEY TRANSITION FROM THEIR WORKS LIVES TO THEIR LIVES AS MOMS)

Connected, multi-tasking moms balance digital media with radio and other traditional media. Nearly nine in ten (86%) say they listened to AM/FM radio in the last week. And radio is still the winner for new music discovery but it's a much closer race with the web now. More than four in 10 (42%) say they turn to radio first to learn about new music, compared to 38% for the internet. With a demanding lifestyle, moms choose media they can multitask with in morning drive. For one third, that means radio, while another third prefer TV in the morning and 28% pick the internet. Just 5% use newspapers in the morning. Radio consumption rises for moms when they get to work. Nearly half (45%) of moms employed full- or part-time listen to the radio at work. Of them, nearly seven in ten (66%) do so on a regular radio. But about two in 10 listen on their computer (18%) and another 15% listen on a mobile device at work. "Mobile devices are changing the way moms listen to radio at work in 2012," Edison VP Melissa DeCesare says. A case study conducted by the Media Behavior Institute last fall showed how interwoven radio is in the media habits of moms. According to that study, radio reaches moms at several activation points during the day: prior to shopping (late morning hours until early evening), during meal prep (one of moms' most consistent and prevalent activities throughout the day) and while out socializing. In fact, radio has 12% daily reach during meal prep time among Millennial and Gen X moms and 13% among Boomer moms

Study: Single parents married to radio- 2011. At an Advertising Week event a Wal-Mart marketing executive said the nation's top retailer has tweaked some of its advertising to spotlight single moms and dads, who now make up 11% of the population. It's an attitude family-focused formats like adult contemporary may want adopt. That's because The Media Audit says its analysis of media usage patterns show single parents are heavier radio users. The study found single moms and dads spend 16% more time

listening to radio during a typical day compared to the general population.

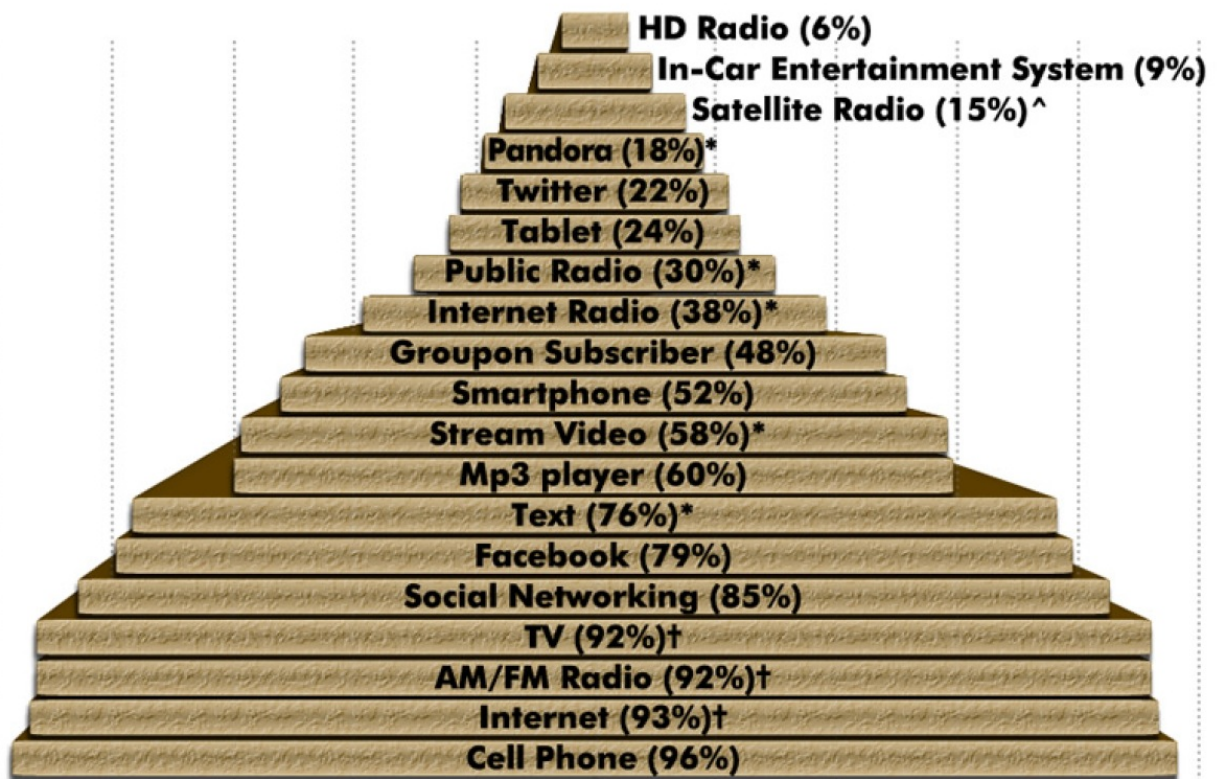
Put another way, single parents listen to radio on average 2 hours, 49 minutes per day. That's nearly one-quarter their total daily media exposure. The Media Audit says it's not just radio — single parents also spend more time watching television and using the internet. One reason is single parents tend to be younger — more than half are in the 18-34 demo.. Surveys were conducted among almost 7,000 single parents across The Media Audit's 80 measured markets.

(COMMENT: ACCORDING TO JACOBS TECH SURVERY 8, RADIO REMAINS A KEY PART OF PEOPLE'S LIVES)



Radio's Digital Landscape Study
170 stations | 12 radio formats | 57,358 radio listeners

Media Usage Pyramid 2012



Using medium weekly or more • †Using medium 1+ hour per day • ^Paid & trial users • No Canadian stations included in the Pandora values