

Radio's Place in the Media Landscape I

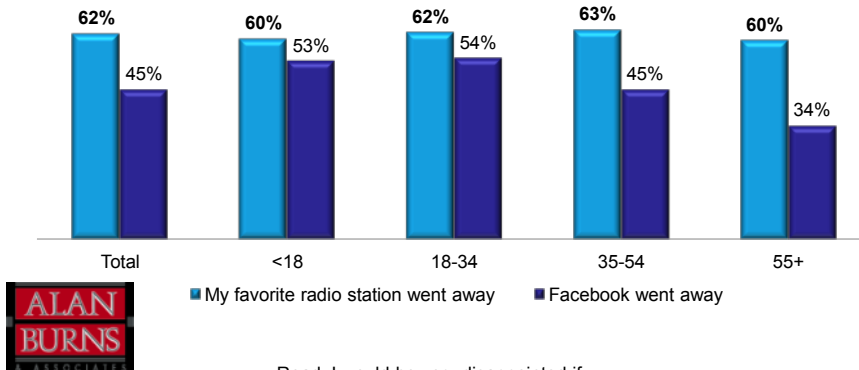


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People of All Ages Value Radio Over Facebook

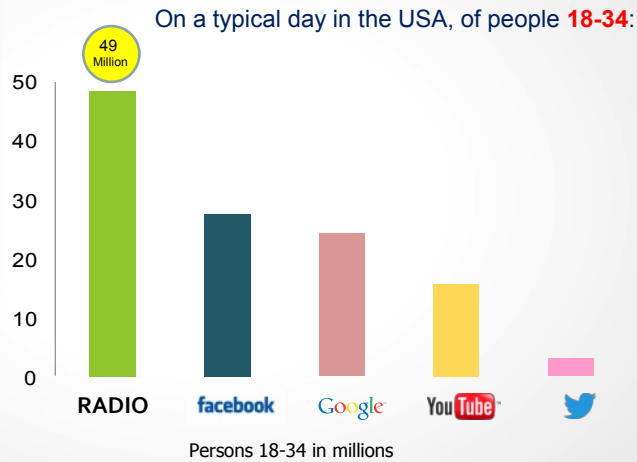


Source: Alan Burns/Triton Digital "The Future of Radio" September 2012 National Consumer Database; 25,000,000 Panelists; August & September 2012; All Ages, Genders and Format Fans; Total Polled = 41,252; Roughly in Line with 2010 Census; Heavily Caucasian

Record labels testify to the power of radio to break hits. CBS Radio says a day of meeting with record label executives yesterday brought a recurring acknowledgement of radio's role in artist promotion. That's a noteworthy shift back to the long-held position of the record companies, which in recent years publicly questioned radio's role in selling records as part of the fight over a performance royalty. "The power of radio has never been greater," said Azoff Music promotions consultant Richard Palmese, whose career began in the late 1960s in morning drive at rock KSHE, St. Louis (94.7) and who has held senior executive positions at MCA Records, J Records, Arista and RCA Music Group. He credited CBS Radio for helping break several of the artists he's worked with. "The airplay is everything and the power rotation is really special," Palmese said. During a meeting with Columbia Records, VP of promotion John Borris drew a direct correlation to music sales. He pointed out that Rita Ora's single "R.I.P." posted a 5% boost in national sales this week — but the gains were five-times as big in markets where CBS Radio's CHR stations have been spinning the record. CBS Radio executives and its senior programming team are continuing with a series of meeting with about one dozen record labels today in New York. The company says during yesterday's conversations a recurring theme was a desire to create programs with radio that will help sell artists and their music. CBS says it expects to announce several new programming initiatives based on those discussions in the coming months

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

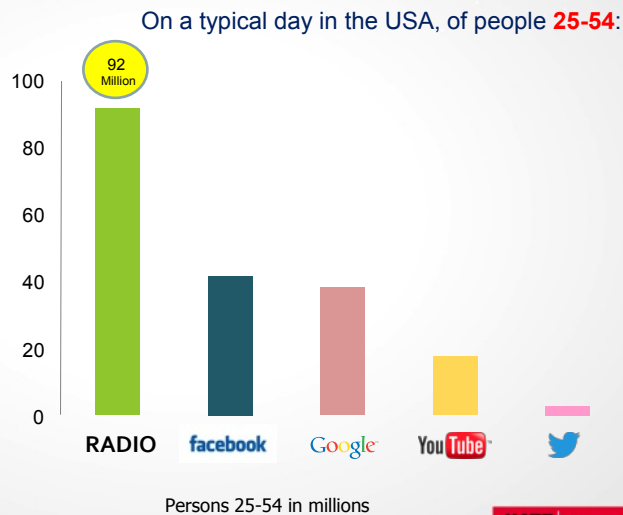
- 85% more will use Radio than will go to Facebook
- 100% more will use Radio than will go to Google Search
- 215% more will use Radio than will go to YouTube
- 1430% more will use Radio than will go to Twitter



Source: comScore Inc Ratings April-June 2012, RADAR 114 September 2012, P18-34, 6A-12M

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

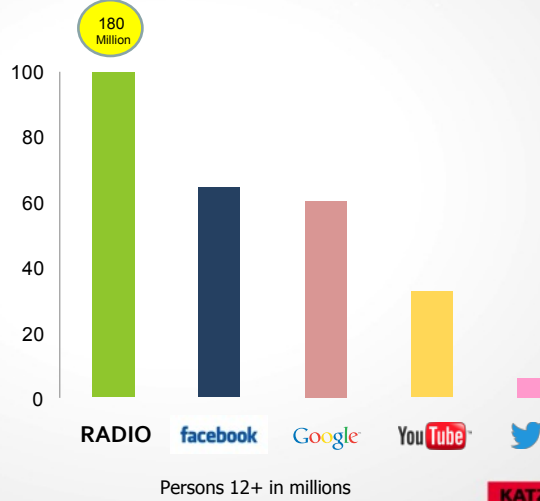


Source: comScore Inc Ratings for April-June 2012, Average Daily Unique Visitors 25-54; RADAR 114 September 2012, P25-54, 6A-12M

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

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

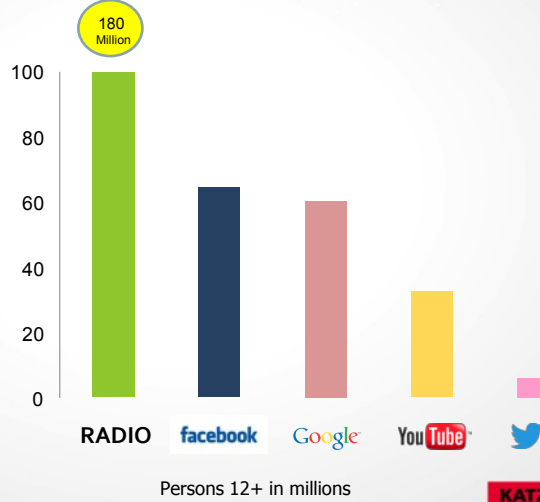


Source: comScore Inc Ratings for April-May 2012, Average Daily Unique Visitors 12+, RADAR June 2012, P12+, 6A-12M

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

- 180% more will use Radio than will go to Facebook
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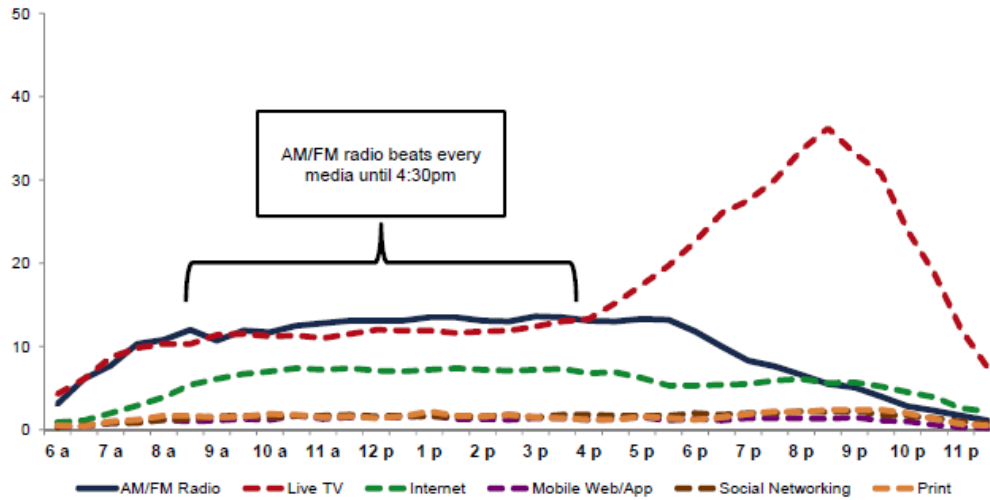
On a typical day in the USA, of people 12+:



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

AM/FM Radio Leads Other Media During the Daytime Monday Through Friday

Average Day Reach by Half Hour During WEEKDAYS
Persons 25-54

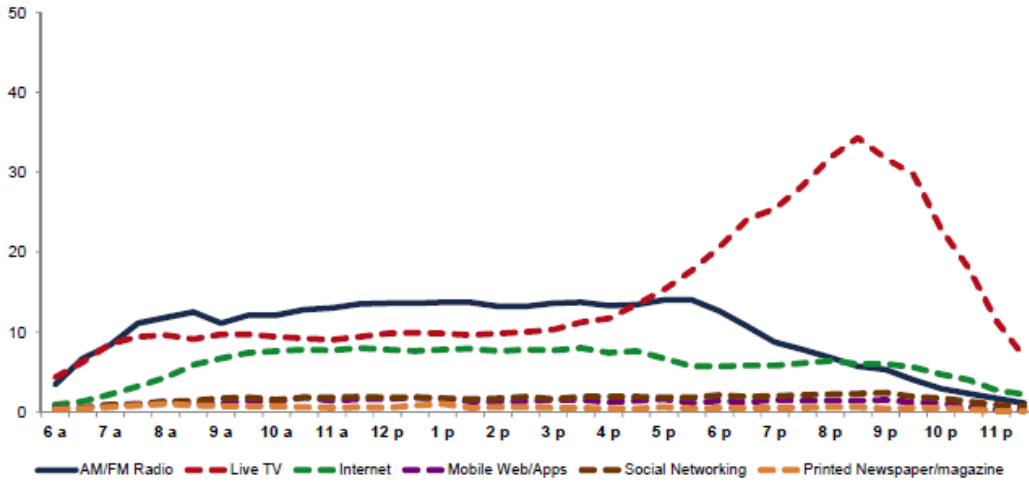


Source: MBI Touchpoints™

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AM/FM Radio's Daytime Lead Expands Among EMPLOYED 25-54s During Weekdays

Average Day Reach by Half Hour During WEEKDAYS
EMPLOYED Persons 25-54



Source: MBI Touchpoints™

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AM/FM Radio Equals TV In Delivering Adults Who are Feeling Positive

% of Audience Feeling Positive*
Persons 25-54



* Positive emotion includes confident, excited, happy, hopeful, interested, loving, or relieved.

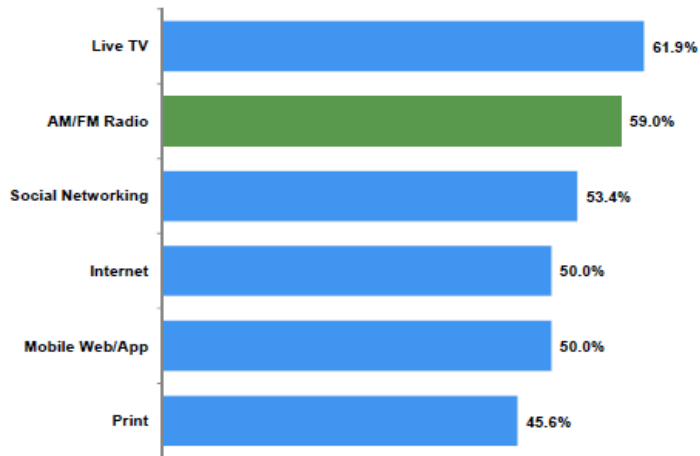


Source: MBI Touchpoints™

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Six in Ten AM/FM Radio Listeners Feel Happy

% of Audience Happy
Persons 25-54



Source: MBI Touchpoints™

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Study Reveals Media Pros Have Digital Media Bias (And Explains Why You're Probably Reading This Via Email)

by [Joe Mandese](#), 47 minutes ago

Madison Avenue, directly or indirectly, allocates nearly a trillion dollars in advertising budgets to influence consumers via media, but how much does the personal media habits and interests of industry pros influence the media they use to do that? It's an old question that it taking on new impetus in the age of hyper accelerated digital media change, and some new research indicates that the personal media habits of industry pros isn't anything like that of the consumers they are charged with influencing.

The research, which was presented by the Media Behavior Institute Thursday night during MPG's Collaborative Alliance session during Advertising Week, indicates that media pros are much more likely to be heavy users of digital media –particularly mobile and social – and are much less likely to use traditional media such as TV and radio than average consumers.

The study, which utilized a mobile app-based diary that a small, non-projectable sample of industry executives used to self-report their media usage during one day in their working life, compared their behavior with MBI's ongoing USA TouchPoints study,

which captures the same daily usage data among the general consumer population for 10-day periods.

While the data is based on a small sample, the findings are striking, because the media pros reporting were so dramatically different than average consumers, especially when it came to their use of Internet-connected computers and mobile devices.

Amazingly, the media pros spent 53% of their waking day interacting with email, vs. 20% for the general population, and they spent 28% accessing the Internet vs. 15% for average consumers.

Their use of mobile apps and social networks were similarly distorted, which may go a long way toward explaining Madison Avenue's obsession with those media platforms.

Ninety-two percent of the media pros utilized mobile apps, and they used them for 11% of their waking day, on average. Only 25% of consumers utilize mobile apps, and use them for 6% of their waking time on average.

Exactly half of the media pros used a social network and accessed it for 19% of their waking time vs. 19% of consumers who used it for 7% of their waking time.

There obviously are many reasons why the media pros index so much higher in their use of digital media, including the fact that it is part of their job, but the data indicates they clearly are not representative of the overall population they are hired to influence with media.

The only digital medium where media pros appear to be in sync with consumers is in their usage, if not ownership, of tablet computers. While media pros were nearly three times more likely to own a tablet (25% vs. 9%), both pros and consumers who own a tablet use them an average of 7% of their waking time.

When it comes to "traditional media," consumers utilize all forms – especially radio – more than industry pros with the exception of print.

"The difference in radio usage was more marked," notes MBI's Mike Bloxham, explaining that, "42% of media professionals listened to the radio, but almost twice that (80%) of the general population sample tuned in.

"The percentage of waking time that listeners from either group spent with the radio was much closer however at 25% for media professionals and 23% for the general population sample."

While 85% of the general population watched TV, only 75% of the media pros did, and their waking time spent with TV showed similar disparities: 26% for consumers vs. 9% for pros.

“The traditional medium that bucked the trend was print,” said Bloxham, noting that, “42% of our media professionals read some form of print on the day vs. 25% of our general population sample, with both groups spending 5-6% of waking time with the medium.”

Bloxham emphasized that the findings are largely anecdotal and that a larger scale study of media pros would need to be conducted before scientific conclusions could be drawn, but that based on the small subset of industry executives sampled, there does indeed appear to be a disparity between their media usage habits and the consumers they are responsible for influencing.

Bloxham said that while some of those skews represent “professionally appropriate biases” – the fact that media pros need to utilize new media in order to evaluate their potential impact, etc. – he said it’s reasonable to conclude that their behaviors and habits likely influence the way they think about consumer media usage too.

“We all view the world from our own eyes,” he said, “If we find as a community that we are markedly different from the communities that we are trying to communicate with and engage for our brand clients, that is a real challenge.”

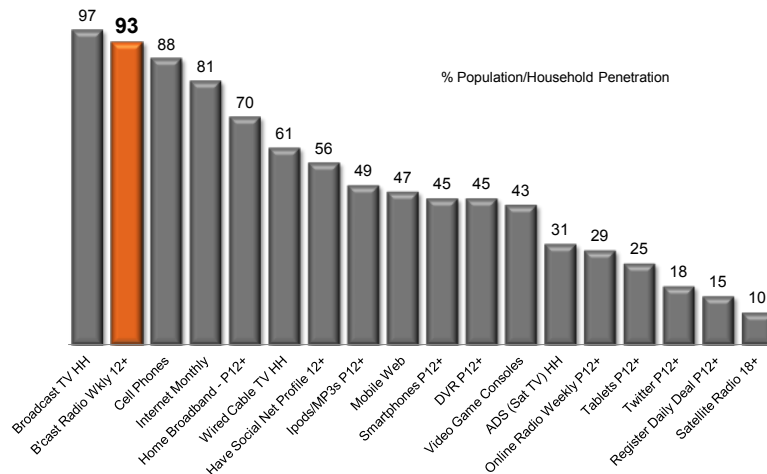


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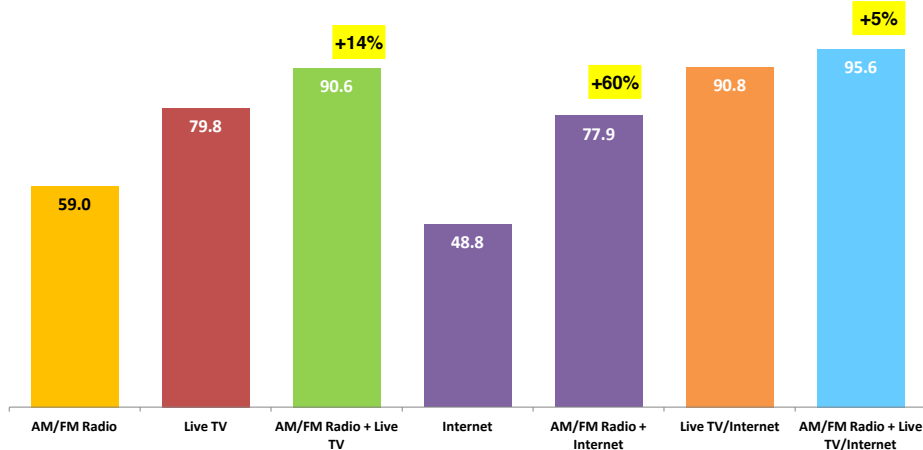
The Second Most Used Platform Today



Source: TV HH, Nielsen May 2011; wkly Radio, Arbitron RADAR March/June/September 2012 M-Su M-M; Internet, Pew Internet & Am Life Sept 2012 Study; Mobile Web comScore Feb 2011 via mobiThinking; DVR, Nov. 2010 NielsenWire; Cable & ADS July 2011 Nielsen Report; iPods/MP3s and Social Net Usage Arbitron/Edison Infinite Dial; 2012; Video Game Consoles from Lichtman Rsearch June 2010; Twitter comScore Dec 2011; Video Game Console, Wireless Cell Phone, High speed Internet Access from Pew Internet & American Life Project Dec 2010, May, June 2011; Tablets, Pew Internet & Am Life Oct 3, 2012; Scarborough USA + Release 2 2011 12 months

AM/FM Radio Adds Considerable Reach When Used in Combination with Other Media

Average Day Reach, AM/FM Radio And Other Media Combinations
Persons 25-54



© 2012 Arbitron Inc.
Source: MBI Touchpoints™

Radio doesn't have you put your life on pause to consume. It takes a part in your life

As an "intimate" medium, radio affords the intimacy of magazines and the trust of a friend (personalities)

Pittman: But his pitch was more subtle, telling marketers that just because consumers are digitally connected, doesn't mean they've unplugged traditional media like radio and TV. In the past their "second screen" was a magazine, or perhaps a telephone conversation. Today it's a smartphone or iPad. "I think people do online what they already do, they just use online to make it more efficient," Pittman said, adding, "When you think about it in those terms you can find an opening for the dialogue with the consumer"

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

9-27-2012

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 Sisen 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*

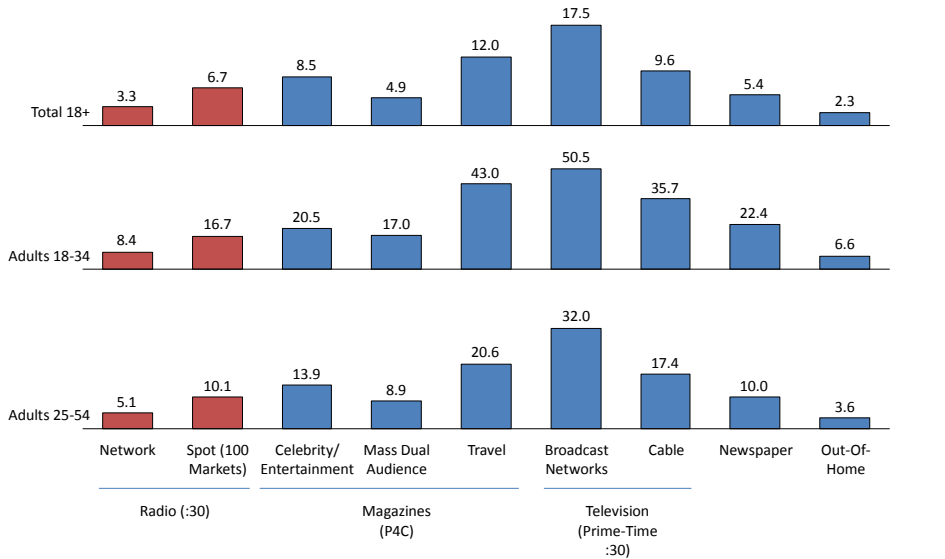
Predictions about the death of traditional television and radio are greatly exaggerated — at least in Canada where consumers are spending more time watching TV and listening to the radio .

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

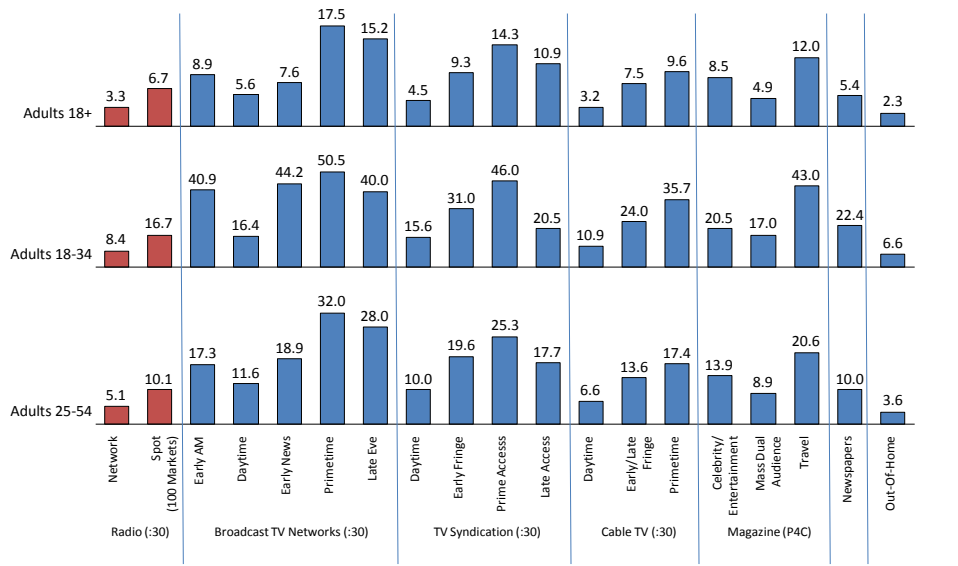
grandchildren. Last year Canadians downloaded more than 20 per cent more from the Internet every month than they did in 2010.

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.

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.

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)

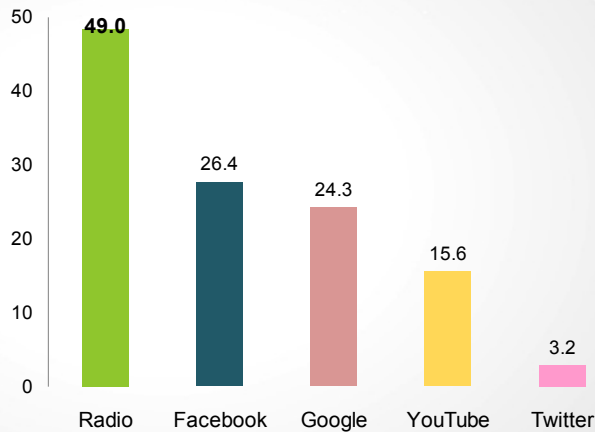
*Every day, about **70%** of people 18-34 invite Local Radio to be a major part of their lives. Let Radio connect you with our listeners.*

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



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

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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)

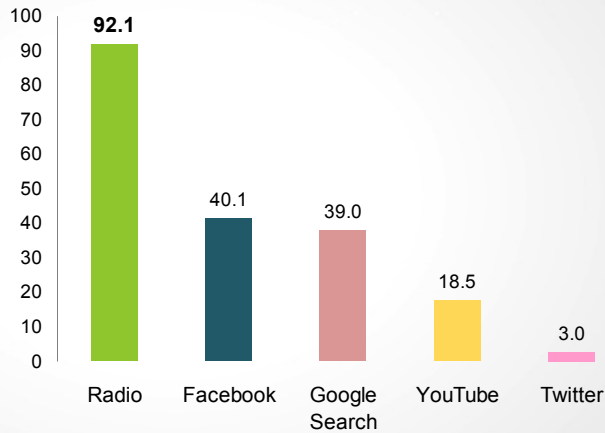
*Every day, **73%** of people 25-54 invite Local Radio to be a major part of their lives. Let Radio connect you with our listeners.*

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)

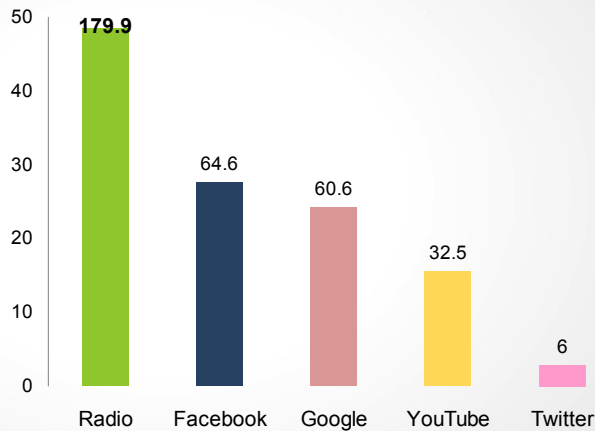
*Every day, about **70%** of people 12+ invite Local Radio to be a major part of their lives. Let Radio connect you with our listeners.*

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

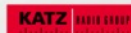


On a typical day in the USA, of people 12+:

- **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

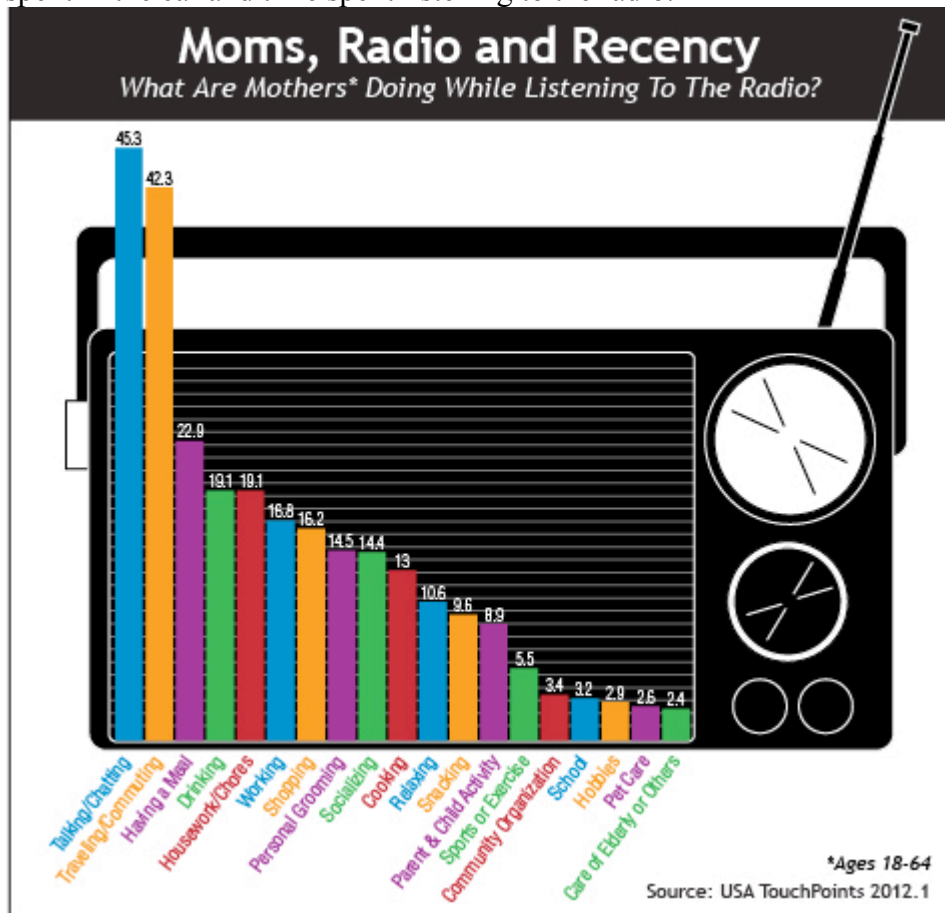
Radio has been such a major part of our lives for so long that it's easy to take it for granted. This USA TouchPoints analysis looks at how exposure to radio correlates with a range of life activities throughout an average day of American moms. The findings tell a long tail indeed.

The cross-section of activities accompanied by radio listening by at least some moms illustrates the extent to which daily life is led to it's 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

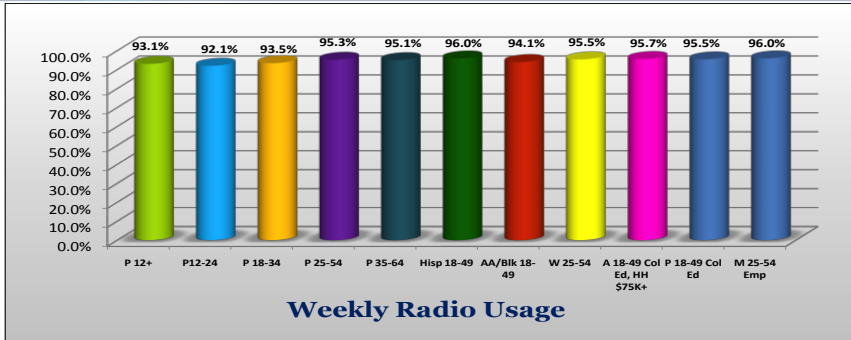
spent in the car and time spent listening to the radio.



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 (18-49 and 25-54), and usage is over 2 hours per day.

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

Radio reaches over 95% of virtually every segment of the population. That has been true year after year and remains true today.

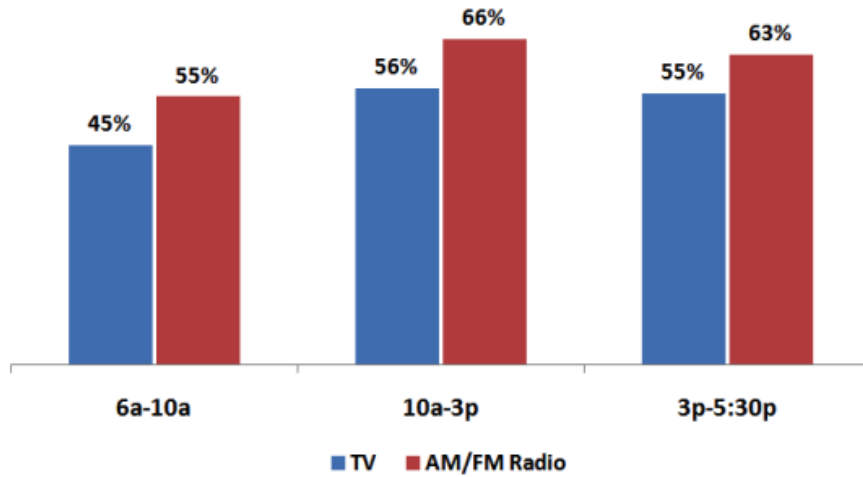


Source: RADAR December 2011

KATZ RADIO GROUP

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

% Weekly Reach by Medium Mon-Fri

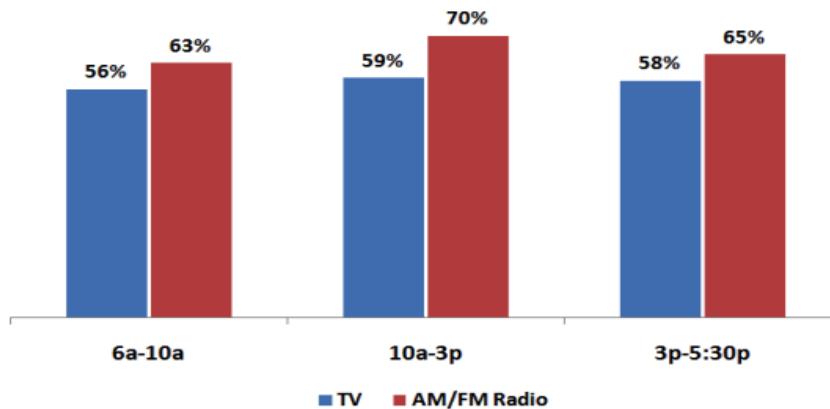


TV includes live and time-shifted

Source: 2012 USA TouchPoints

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

% Weekly Reach by Medium Mon-Fri

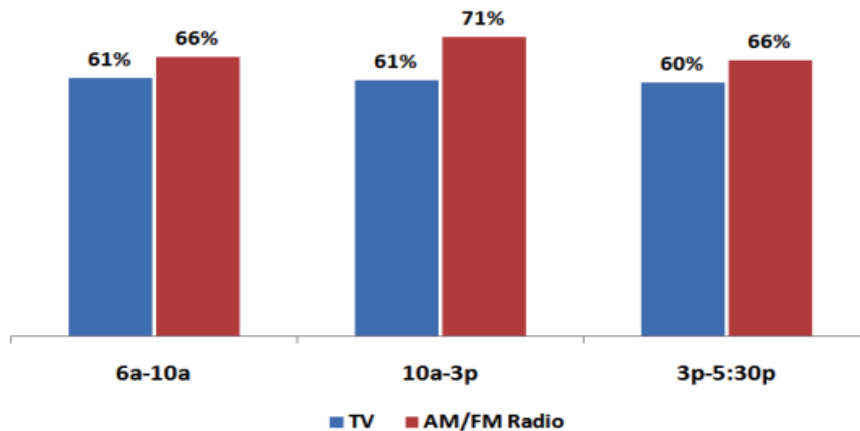


TV includes live and time-shifted

Source: 2012 USA TouchPoints

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

% Weekly Reach by Medium Mon-Fri



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-REGENCY AND PROPINQUITY)

7/12 The Whole Story: Breakfast Media

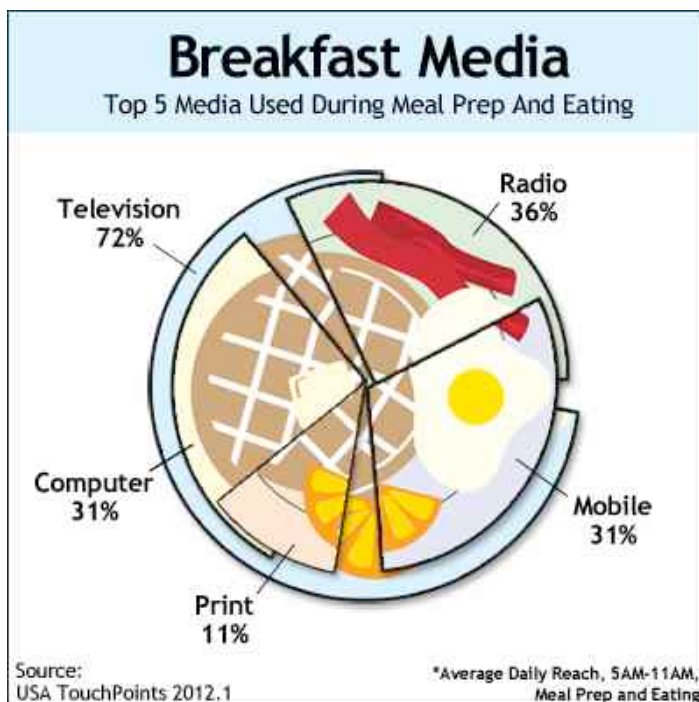
by [Mike Bloxham](#)

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 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 Cumes

N=2,010

Interviewed May 2012
Online via SSI National Panel

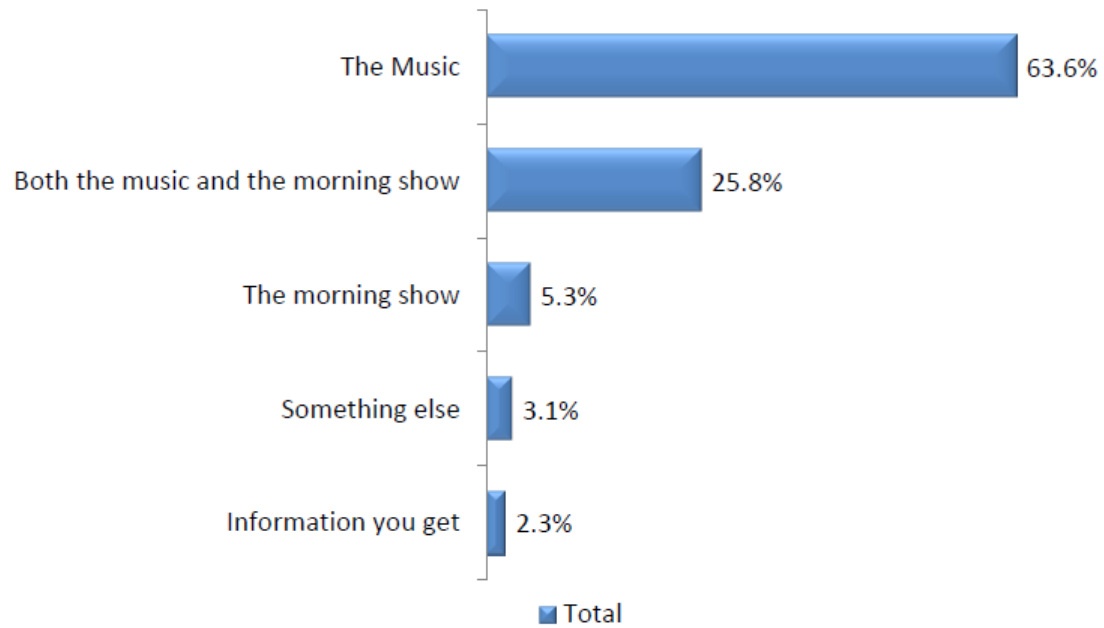
©2012 Alan Burns & Associates

(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%

© 2012 Alan Burns & Associates

(COMMENT: SLIDE BELOW- WHILE LISTENING TO THE RADIO IS DOWN 15 MINUTES FROM LAST YEAR LISTENING TO RADIO ONLINE OR ON 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



©2012 Alan Burns & Associates

(COMMENT. SLIDE BELOW- 13% OF RESPONDENTS TO THE BURNS SURVEY INDICATED THEY 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.

©2012 Alan Burns & Associates

**COMMENT: SLIDE BELOW- OVERALL RADIO LISTENING IS UP IN SPITE
OF LISTENING TO RADIO ON 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%	
	X8qh	X7qh	
=	637	=	481
<hr/>			
Online	19.3%	24.8%	
	x2qh	x6qh	
=	39	=	149
<hr/>			
On a Cell Phone	8.2%	13.4%	
	x1qh	x5qh	
=	8	=	68
<hr/>			
Totals	=	684	= 697 <u>up 1.9%</u>

© 2012 Alan Burns & Associates

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

ARBITRON INC. (NYSE: **ARBIT**)

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

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

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 IT'S 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 AGGRESSIVELY WITH KEY DECISIONS 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

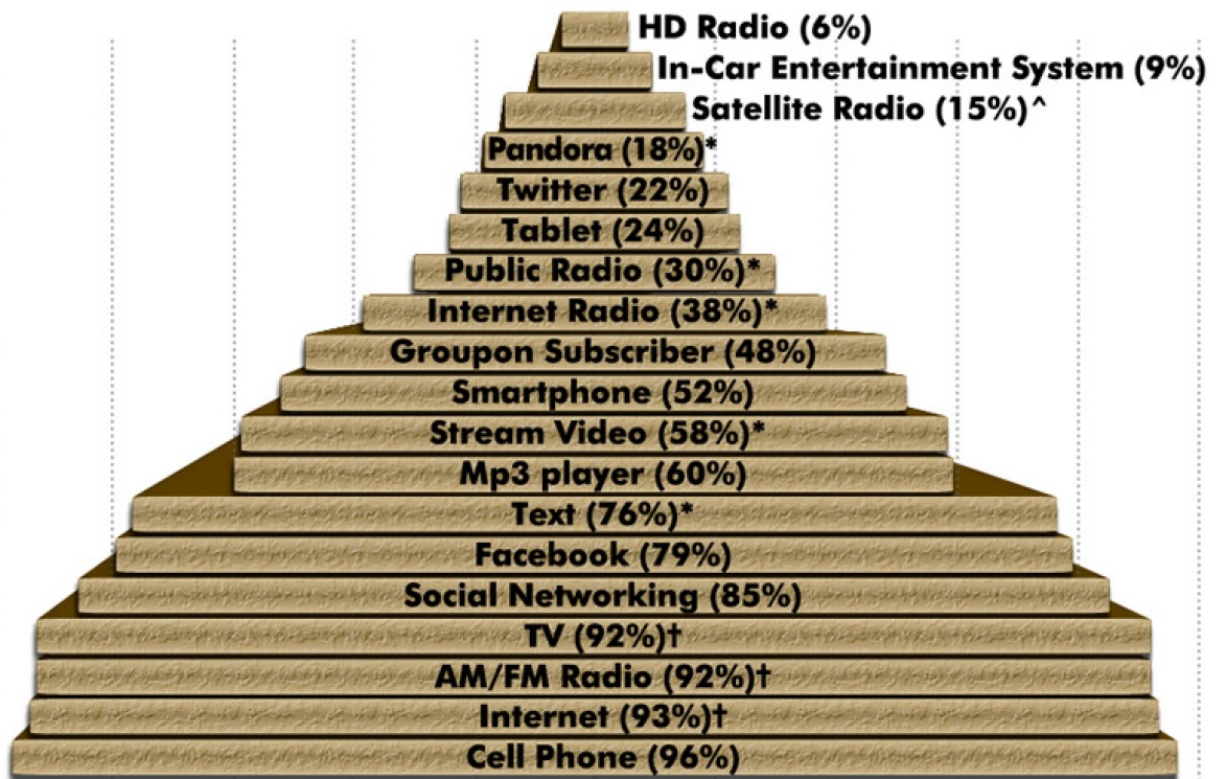
time watching television and using the internet. One reason is single parents tend to be younger — more than half are in the 18-34 demo.. Surveys were conducted among almost 7,000 single parents across The Media Audit's 80 measured markets.

(COMMENT: ACCORDING TO JACOBS TECH SURVEY 8, RADIO REMAINS 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

(COMMENT-RADIO LISTENERS DON'T HAVE TO BE BRIBED TO "LIKE" STATIONS ON FACEBOOK. THE "LIKE" STATION SIMPLY BECAUSE THEY LIKE IT)

5/12 For Radio Listeners, Liking is Literal

May 1, 2012

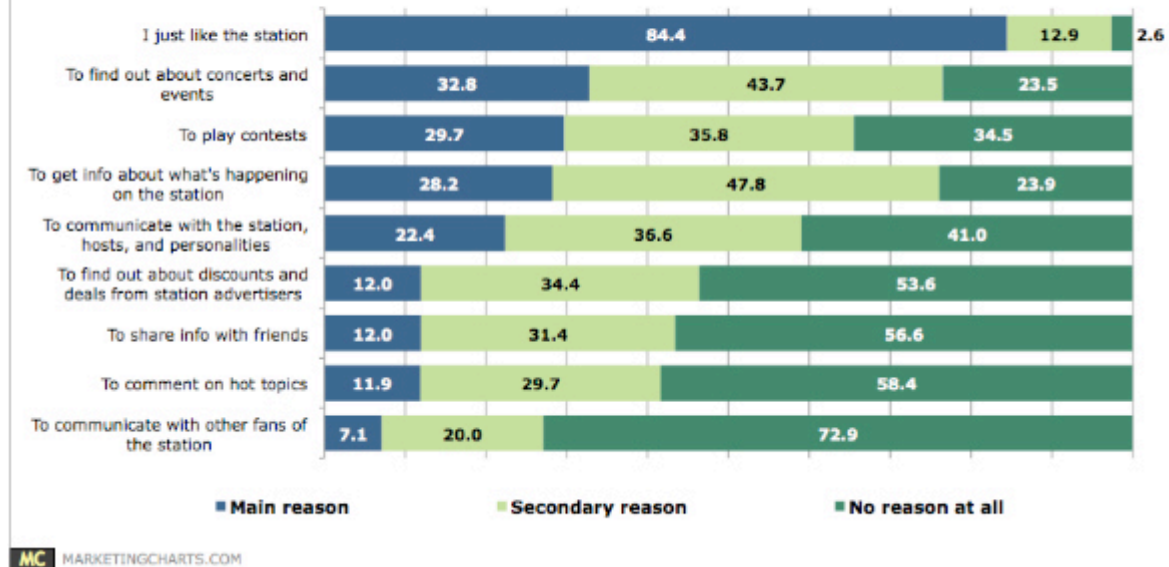
[inShare5](#)

Radio LISTENERS who LIKE THEIR STATIONS on FACEBOOK overwhelmingly do so out of A SIMPLE AFFINITY for THE STATION, [finds JACOBS MEDIA](#) in A SURVEY of ABOUT 57,000 RADIO LISTENERS in THE US AND CANADA RELEASED in APRIL 2012. OUT OF THE 45.9% of RESPONDENTS who HAD LIKED THE STATIONS THAT SENT THEM THE SURVEY on FACEBOOK, AN IMPRESSIVE 84.4% SAID THEIR MAIN REASON for doing so WAS BECAUSE THEY JUST LIKE THE STATION. THE NEXT-CLOSEST primary REASONS given were TO FIND OUT ABOUT CONCERTS AND EVENTS (32.3%) AND TO PLAY CONTESTS (29.7%). By COMPARISON, DATA from A MARKETFORCE study ALSO RELEASED in APRIL 2012 INDICATES THAT among US RESPONDENTS who REGULARLY LIKE THE FACEBOOK PAGE of RESTAURANT, RETAIL, TRAVEL, ENTERTAINMENT, AND FINANCIAL SERVICES businesses, THE CHIEF REASON for doing so IS TO TAKE ADVANTAGE of DISCOUNTS AND OTHER INCENTIVES (79%), followed by SEEING DETAILS on SALES AND EVENTS (70%). (HIGHLIGHTS unique RELATIONSHIP with LISTENERS.

Reasons for Liking a Radio Station on Facebook

(% of radio listeners who have liked the Facebook page of their radio station)

May 2012



(COMMENT: WHO SAYS PEOPLE REN'T ENGAGED WITH RADIO?)

The Power of Radio: More than \$1 million raised by Radio One for kids' charity. From **LOCAL** gospel stations **TO ITS** syndicated programs, Radio One says **A one-day radiothon raised more than \$1 million during its fifth annual Radio CARES for ST. Jude Kids NATIONAL EVENT. THE COMPANY** says 11 of its gospel stations took part in **THE APRIL 5 EVENT** as well as Syndication One's "Yolanda Adams Morning Show" and "Coco Brother LIVE" programs — **THE LATER RAISING A RECORD \$250,00 during his four-hour EVENING show.**

(

(COMMENT: SLIDE BELOW- THE MEDIAN AGE OF THE HEAVY RADIO USER MATCHES THE MEDIAN AGE OF THE U.S. MORE CLOSELY THAN THE INTERNET OR TV)

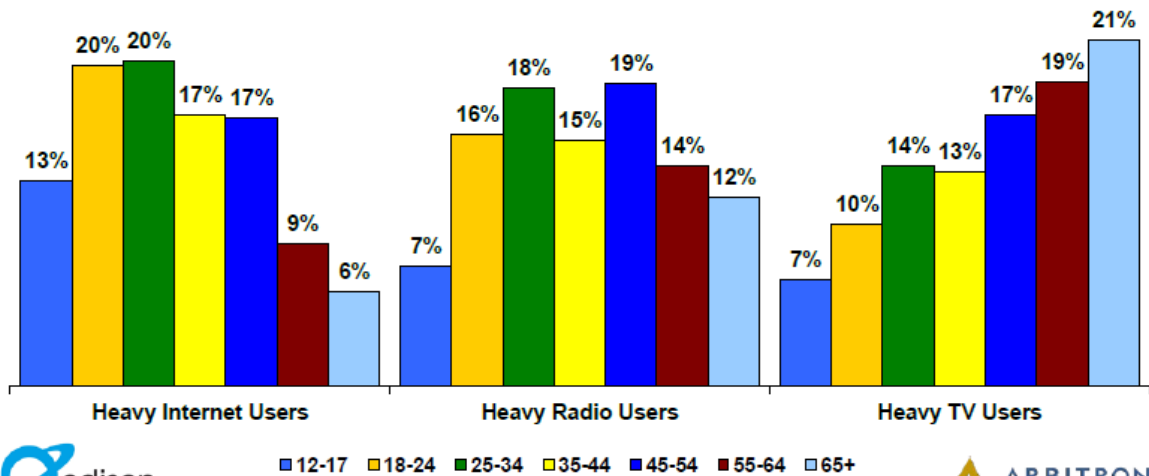
Ages of Heavy Radio Users Closest to Population; Heavy Internet Users Skew Younger, Heavy TV Users Lean Older

Age Composition of...

Heavy Internet Users
Median Age = 36

Heavy Radio Users
Median Age = 42

Heavy TV Users
Median Age = 47

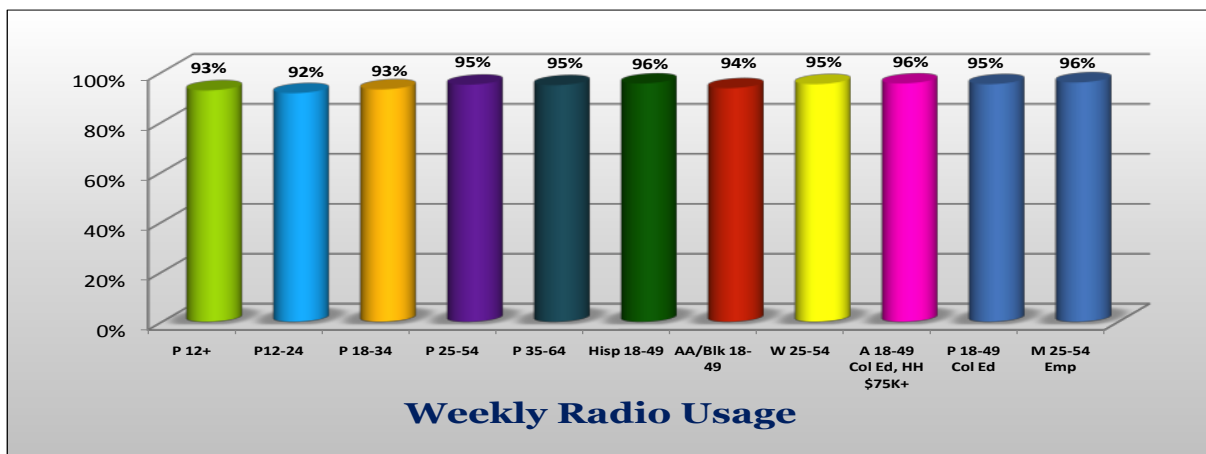


■ 12-17 ■ 18-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55-64 ■ 65+



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

Radio reaches over 92% of virtually every segment of the population. That that has been true year after year and remains true today.

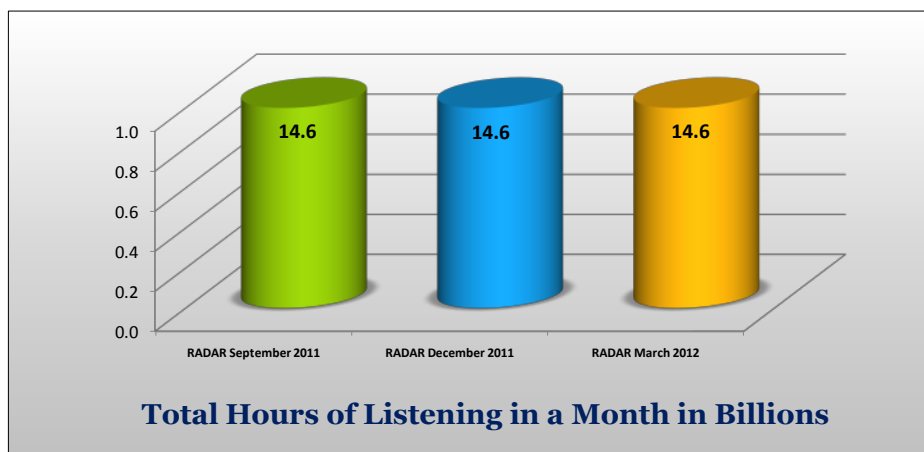


Source: RADAR March 2012, Mon-Sun 6A-Mid



Nearly Everyone Uses Radio. In Real Time.

**Total Hours Spent Listening to Radio Remains
Massive and Consistent**



Source: RADAR September 2011, December 2011, March 2012, Persons 12+, Monday – Sunday 6A-Mid



(COMMENT. PUTS FACEBOOK USE IN PERSPECTIVE IN RELATIONSHIP TO RADIO- NOT CLOSE)

The average Facebook user spends seven hours per month using the social network, according to new comScore data. That's half as much time as the average person listens to radio in a week, according to Arbitron. Looked at another way, the average person spends eight-times more time per month listening to the radio than interacting on Facebook.

(COMMENT. STUDY AFTER STUDY SHOWS THAT PEOPLE OVERSTATE THEIR USAGE OF THE NEW AND COOL DEVICES. THERE'S A MAJOR DIFFERENCE BETWEEN WHAT PEOPLE ACTUALLY DO VS WHAT THEY SAY THEY DO)

We've seen the same thing in the 2008 Nielsen Council of Research Excellence \$3.5 million media study: people grossly over-report their usage of new technology and media alternatives and under-report their use of traditional media- Sanford C. Bernstein & Co. Senior Analyst Todd Juenger notes that while the perception is that young people are abandoning television, "everybody over-reports usage of internet and mobile video and under-reports usage of traditional television." (We can substitute "radio" for "television" and above would still be true)

(COMMENT: USA TOUCHPOINT DATA IS SOPHISTICATED AND RICH DATA AVAILABLE TO MARKETERS AND SALES ORGANIZATIONS. THE AVERAGE TOUCHPOINT RESPONDER FILLED OUT THE APP ON THEIR SMART PHONE 16X/DAY- EXTREMELY ACCURATE. WHAT IS PARTICULARLY INTERESTING ABOUT THIS DATA IS THAT IN SPITE OF ALL OF THE TECHNOLOGICAL AND AUDIO OPTION PROLIFERATION OVER THE PAST 4 YEARS, THE RADIO DATA IS VERY SIMILAR TO THE ETHNOGRAPHIC MEDIA STUDY CONDUCTED BY THE COUNCIL FOR RESEARCH EXCELLENCE IN 2008)

New research enables us to get a deeper glimpse into how people use broadcast radio. USA TouchPoints: The media industry's newest and most sophisticated research confirms Radio's importance.

In 2010, **THE COALITION for INNOVATIVE MEDIA MEASUREMENT** chose **MEDIA BEHAVIOR INSTITUTE** as its partner in developing an innovative, **CONSUMER-CENTRIC CROSS-MEDIA CONTEXTUAL PLANNING INITIATIVE. CMMI**, as it's known, is comprised of many of the nation's largest and most sophisticated advertisers and agencies. **MEDIA BEHAVIOR INSTITUTE** was chosen primarily due to its methodology, **THE USA TOUCHPOINTS 10 DAY DIARY**, which utilizes a smartphone app that had been used for successfully for several years in the UK. **MEDIA BEHAVIOR INSTITUTE**'s managing director of **CMMI JANE CLARK** stated, "We searched the globe to find the most consumer-centric platform approaches---UK TouchPoints is by far the most comprehensive and provides the best way to link cross media measurement and provide an understanding of media usage in context."

THE PRIMARY GOAL OF THE STUDY WAS TO ENABLE ADVERTISERS AND AGENCY PLANNERS TO GAIN A GREATER UNDERSTANDING AND APPRECIATION OF THE ENTIRE CONSUMER MEDIA EXPERIENCE, I.E. WHAT MOOD AND MINDSET THE

**Consumer had while Consuming media and Encountering Advertising
As well as where and with whom it being Consumed**

**The USA TouchPoints pilot ran 10 days from October 1, 2010- March
1, 2011, and consisted of a sample of 1,000 adults ages 18-64, with
the average participant interacting with the app 16 times per day.**

**The USA TouchPoints findings support the results of both
Middletown studies conducted by the Center for Media Design at
Ball State University in 2004 and 2005, as well as the Council of
Research Excellence Video Consumer Mapping Study, conducted in
2008 from which Nielsen's 360 Degree View of Audio Usage in
America was extracted in 2009. All three studies utilized
ethnographic methodology and all three concluded that radio
remains an extremely vital and valued part of many people's day.
Brief recap of some of the initial findings follow:**

***Radio reaches more Millennials, Gen-Xers and Boomers each
day and throughout the week than the four television networks,
NBC, CBS, ABC and Fox, combined.**

***Radio is the #1 medium with Millennials, Gen-Xers and
Boomers who are employed full-time Monday-Friday 6:00 AM-
5:30 PM, far out-distancing TV, not just the 4 major networks.**

***Other digital audio alternatives remain supplements rather than
substitutes. Typically 85%+ of those that use them also listen to**

M/F radio

*Radio's **APPEAL** WITHIN THE 18-34 DEMO IS ROCK SOLID AND APPROXIMATELY EQUAL TO THAT OF THE GENERAL POPULATION WITH 18-34'S LISTENING 2:21 MINUTES/DAY TO RADIO VERSUS 2:34/DAY FOR 18-64.

*ALMOST ONE-QUARTER (23%) OF THE AVERAGE 18-64'S DAILY TIME WITH MEDIA IS SPENT WITH RADIO, 19% WITH THE INTERNET, 2% WITH THE NEWSPAPER, 1% WITH MAGAZINES AND 55% WITH TELEVISION.

*Radio remains the solid #2 medium with the 18-64 AND the 18-34 demographic.

*Radio dominates newspaper (online + printed) and magazines (online + printed).

*Mobile phone apps and mobile web usage ranges anywhere between 1/4 to 1/3 of radio daily usage.

Despite the nearly three year difference between the data collection for the Nielsen Audio study in 2008 and the USA TouchPoints study in 2012, radio's metrics remain extremely impressive and consistent.

(GREAT PERSPECTIVE FROM ANTHONY YOUNG CEO MINDSHARE. WE SHOULD POSITION THE RADIO MEDIUM THIS WAY EVERY CHANCE WE GET)

How to Package Traditional Media to New-Age Marketers

In my **LAST ARTICLE** for **Ad Age**, I wrote about how new-media companies were **successfully employing very traditional media tactics** to gain a larger share of ad spending.

I thought I'd flip that on its head this week, as the tech, media and marketing worlds converge at the Consumer Electronics Show in Las Vegas.

One could argue traditional media too have been too "traditional" in how they pitch themselves, making it too easy for advertisers and others to peg them to the past. Perhaps they've been doing themselves a disservice. What if we relooked at a medium such as radio, using the sizzle employed by the very best of Silicon Valley to promote this 90-year-old advertising medium?

Here's what a sales pitch for radio could look like.

Let me introduce you to a groundbreaking media channel, a medium with the potential to rival Facebook as a new-media darling...

A powerful mobile medium

This medium is available on just about every mobile device, including those running Android and iPhone operating systems. It is accessible in 100% of today's cars. This medium is a powerful channel to engage very desirable, hard-to-reach and mobile

MILLENNIALS. ITS DISTRIBUTION ALSO EXTENDS TO OUT-OF-HOME VENUES INCLUDING RETAIL OUTLETS, FAST-FOOD RESTAURANTS, CAR DEALERSHIPS AND SPORTS VENUES, MAKING IT A POWERFUL MEDIUM AT POINT OF PURCHASE.

Drives word of mouth

WE CAN INCORPORATE PERSONALIZED BRAND MESSAGES TO OUR AUDIENCE TO CREATE BUZZ AND WORD OF MOUTH. WE USE THE CREDIBILITY OF OUR CELEBRITY ANNOUNCERS TO DRIVE THE CONVERSATION AROUND YOUR BRAND, RETAIL EVENTS AND PROMOTIONAL OFFERS. WE ALSO WILL GENERATE CONSUMER PARTICIPATION AND ENGAGEMENT VIA BRAND-BASED COMPETITIONS.

Hyper-local targeting

NO NEED FOR WASTEFUL NATIONAL CAMPAIGNS THAT CAN'T BE CUSTOMIZED BASED ON YOUR LOCAL RETAIL-STORE DISTRIBUTION. OUR MEDIUM GIVES YOU THE FLEXIBILITY TO TARGET AT A HYPER-LOCAL LEVEL. WE CAN ALSO DELIVER SPECIFIC LOCALIZED MESSAGING.

Delivers across multiple platforms

WE DISTRIBUTE ACROSS BROADCAST, ONLINE AND MOBILE DEVICES. OUR MEDIUM IS ALWAYS ON.

Provides scalable campaigns

OUR ADVERTISER PROMOTIONS CAN DELIVER PROGRAMS ACROSS LITERALLY MILLIONS OF CONSUMERS IN A SHORT PERIOD OF TIME. OUR MEDIUM HAS A REACH OF NEARLY 300 MILLION UNIQUES IN THE U.S. ACROSS A MONTH. THAT MAKES THIS MEDIUM BIGGER THAN FACEBOOK.

A viable revenue model

WE OPERATE A FREE-CONTENT, AD-SUPPORTED MODEL THAT ENSURES HIGH

uptake and that our research confirms consumers prefer over a paid-subscription model. Advertiser units provide marketers with 100% control of the message. We also offer advertisers a branded content model. We will work with advertisers to deliver customized content that brands can be integrated with or associate with.

Yes, that's right, I'm talking about radio ... a unique mobile, hyper-local, multi-platform channel that delivers scalable brand marketing campaigns for advertisers.

Now doesn't that make radio seem just a little more interesting!

ABOUT THE AUTHOR

Antony Young is the CEO of [Mindshare](#) North America, a WPP media strategy and investment agency. He recently published "Brand Media Strategy," a Palgrave Macmillan and advertising age publication about integrated communications planning in the Google and Facebook era.

(COMMENT: LIKE THE COMMUNICATION CONTINUUM ANALOGY... RADIO BRIDGES TV AND POINT OF PURCHASE. ALSO LIKE CONTEXT OF USE AND MOMENT OF RECEPTIVITY. PEOPLE ARE MORE OPEN TO RECEIVE COMMERCIAL MESSAGING

WHEN THEY ARE RELAXED THAN WHEN THEY ARE IN TASK
FOCUSED MODE WHICH THEY ARE SO OFTEN WHEN ENGAGING
WITH THE INTERNET)

Radio - Deserving Of More Attention? by Mike Bloxham

I've written before about my view that no medium innately "deserves" any particular share of ad spend based on the amount of time people spend with it. Nor should the simple matter of audience size be the sole determinant that drives budget allocation.

Other variables such as the context of consumption (where and when the medium is accessed, the social setting, the user experiences and the inter-relationship with other media by day part etc.) all go to informing the allocation of media budgets and yielding a higher return on investment.

Then there's the simple fact of how well a given sector does in building and retaining its share. This, of course, is the ultimate determinant of success. In the arena of media sales, its devil take the hindmost and anyone who can achieve a share that is apparently disproportionate to their relative position as a medium (or property) is free to do so -- all credit to them. The notion of proportionality has no place in this particular mix.

But even taking into such points into account, I still find it curious radio has -- for the most part -- become an over-looked medium for

many brands **RELATIVE TO TV** and **EVEN TO MUCH SMALLER** (but perhaps **NEWER** and more shiny) **MEDIA OPPORTUNITIES**, such as **SOCIAL** and **MOBILE**.

THE POINT OF COURSE ISN'T THAT RADIO -- OR ANY OF THE OTHERS -- ARE "BETTER" THAN THE REST. Any medium **CAN** only be fully **MAXIMIZED** for an **ADVERTISER** when **APPROACHED AS PART OF A JOINED UP MEDIA MIX.** BUT when you **CONSIDER THE NEAR-UBIQUITY OF RADIO IN MANY CONSUMERS' LIVES,** IT IS SURPRISING THAT THE MEDIUM HAS TO FIGHT SO HARD FOR ITS SHARE OF THE PIE.

For **EXAMPLE;** with 79% of **AMERICAN ADULTS** using **A CAR** in any one day and 39% of **M/F** **RADIO LISTENING TAKING PLACE IN THE CAR** (where the medium far **OUT-PACES** **CDs, SATELLITE** and **MP3s**), **THERE IS CLEARLY A SIGNIFICANT OPPORTUNITY TO REACH MANY AUDIENCES AT KEY MOMENTS OF RECEPTIVITY AND DECISION MAKING.**

Add to this **THE FACT THAT RADIO OUTSTIPS ALL OTHER MEDIA COMBINED** in terms of **REACH** in an **AVERAGE WEEKLY** morning (6A-12noon) among **ADULTS MAKING PURCHASES IN A QSR BETWEEN 12-12.30 P.M.,** and **IT'S NOT DIFFICULT TO JUSTIFY THE MEDIUM'S INCLUSION ON A CAMPAIGN PLAN IN THAT SECTOR.**

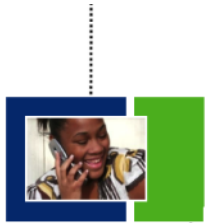
SIMILARLY (AND THIS IS ANOTHER EXAMPLE, AS ABOVE, TAKEN FROM USA TOUCHPOINTS DATA), in the hour before the **EARLY AFTERNOON PEAK** shopping time of 1:30 p.m., **A FULL 34% OF SHOPPERS ARE LISTENING TO THE RADIO FOR AT LEAST SOME OF THAT HOUR -- SIGNIFICANTLY MORE THAN ANY OTHER MEDIUM.**

Does **THAT MEAN THAT** those **OTHER MEDIA** don't **HAVE A ROLE TO PLAY** in **TARGETING** shoppers with **RELEVANT MESSAGES** in key moments of **RECEPTIVITY**? Of **COURSE NOT**. **But there's a *communications continuum* for any brand targeting a given consumer group, and while TV might be further from the point of purchase and mobile may be at the point of purchase, radio makes a pretty strong case as the medium that *bridges the two*.**

THESE ARE just **A FEW EXAMPLES**, but **AS I LOOK AT THE DATA -- DATA THAT HAS MUCH MORE TO DO WITH CONTEXT OF USE AND LIKELY MOMENTS OF RECEPTIVITY THAN WITH SIMPLE MEASURE OF TIME SPENT OR REACH ALONE -- I CAN'T HELP WONDER** why more **BRANDS AREN'T MAKING BETTER USE OF A MEDIUM THAT CAN GET THEM TO THE RIGHT PLACE AT THE RIGHT TIME.**

HAS THE INDUSTRY BEEN SEDUCED by **THINGS THAT ARE** simply **NEWER AND MORE SHINY**? Or is **THE ABSENCE OF VIDEO SUFFICIENT TO JUSTIFY A BRAND'S ABSENCE AT KEY TIMES IN THE DAY?**

THE FOLLOWING DETAILS USA TOUCHPOINTS METHODOLOGY THAT MIKE BLOXHAM REFERENCED ABOVE:



Background

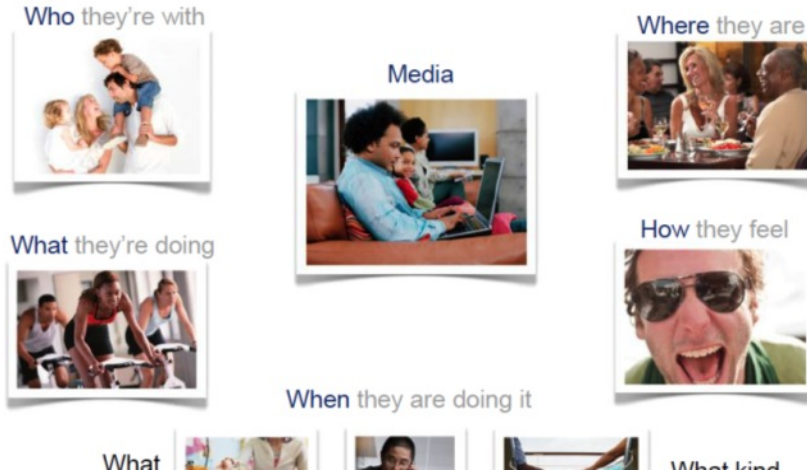
In April 2010, the Coalition for Innovative Media Measurement selected Media Behavior Institute as its partner in developing innovative cross-platform insights and metrics



Current Members

A+E Networks	Gannett	P&G
AT&T	GroupM	PepsiCo
Belo	Hearst	Publicis Groupe
Carat	Interpublic Group's	Scripps Networks
CBS Corporation	Mediabrand	Interactive
Comcast Networks	Microsoft	Time Warner
ConAgra	NBC Universal	Unilever
Discovery	News Corporation	Viacom
Communications	Omnicom Media Group	The Walt Disney Co.

Introducing Life Context



5

USA TouchPoints 10-Day eDiary



Who are you with?

Where are you?

What are you doing?

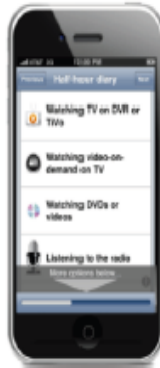
What media are you using?

How do you feel?

4 USA TouchPoints

What Is USA TouchPoints?

- USA TouchPoints is a rich, multi-dimensional study of American consumers' daily lives – including their moods, emotional states and media consumption.
- Captures behavior in real time throughout the day, helping marketers identify the contextual factors that impact consumers' receptivity to their message.
- Provides unrivaled insights with which to develop more precise and relevant marketing plans and communications
- Innovative foundation for fusing other media research services



USA TouchPoints Life Context Measures

- Who** they're with ... 9 different social settings
- Where** consumers are ... 14 different locations
- How** they feel ... mood and 18 emotional states
- When** they are doing it ... all waking hours of the day in ½ hour increments
- What** they're doing ... 19 life activities
- What** media they're exposed to
- What** they buy, own, use ... based on their answers to MRI's survey of the American Consumer
- What** kind of people they are ... psychographics and lifestyle from MRI

Syndicated Study Plans

- National probability sample drawn from GFK MRI's Survey of the American Consumer
- Fielded Oct 2010 - Mar 2011 and Aug 2011-Dec 2011
- Sample size: 21,000 based on 2,000+ respondents

Using USA TouchPoints for Campaign Planning

- Data available through IMS, Telmar and Pointlogic
- Cross-tabbing and mapping
- Schedule R/F will be available after currency fusions are complete

What can you do with USA TouchPoints?

- Paint a complete picture of the consumer landscape
 - The "who, what, what, where and when" of consumer behavior and the interplay of media exposure in time
- Uncover details about contextual factors that influence receptivity
- Target consumers in specific "need states" or moods
- Enhance custom databases and segmentation studies
- Understand actionable and quantitative ethnographies

USA TouchPoints Media Covered

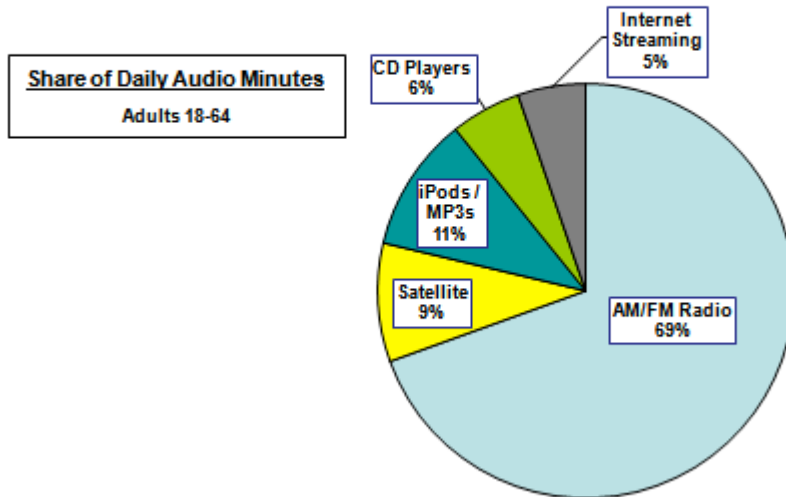
- 54 Broadcast and cable nets
- 15 Website genres
- 11 Program types
- + Word of mouth
- 11 Radio formats
- 16 Magazine genres
- 8 Local/Nat'l newspapers



COMMENT. THE SLIDE BELOW HIGHLIGHTS THE FACT THAT VIRTUALLY 70% OF THE AVERAGE 18-64'S TIME IS SPENT WITH M/F RADIO. NOTE THAT THIS DOES NOT INCLUDE STREAMING OF M/F CONTENT SO IT ACTUALLY UNDERSTATES RADIO'S TRUE AUDIENCE)

Below is taken from 2012 USA TouchPoints- AM/FM radio continues to dominate the audio landscape-

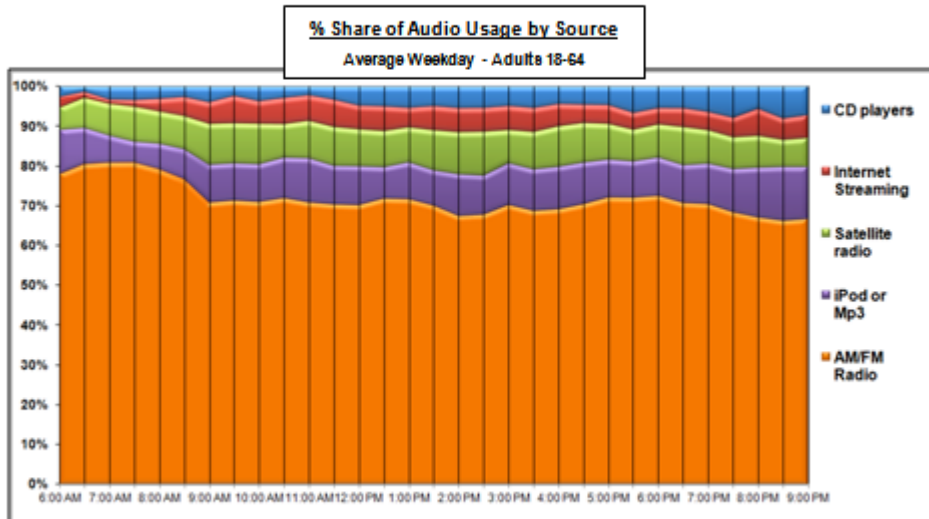
AM/FM Radio comprises over two-thirds of the time Americans spend with audio



12

Source: 2012 USA TouchPoints

AM/FM Radio's share of audio usage remains dominant through the day

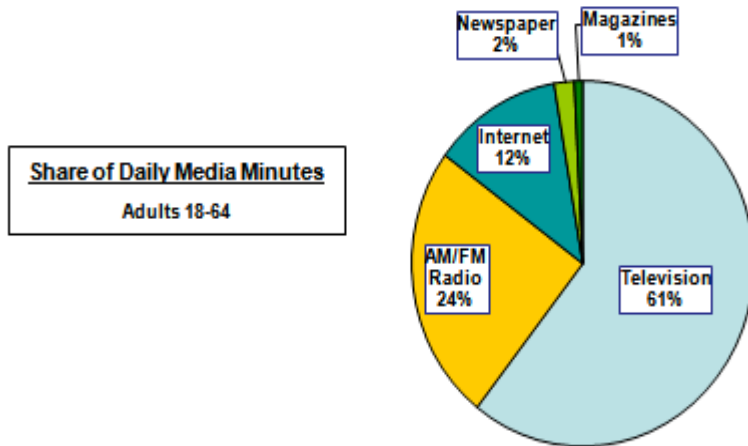


15

Source: 2012 USA TouchPoints

(COMMENT: ALL TOO OFTEN STUDIES INCLUDE EMAIL IN THE INTERNET USAGE #'S. THIS SLIDE DOESN'T BUT INCLUDES ALL OTHER ONLINE FUNCTIONS. FACTOR OUT EMAIL USE AND RADIO'S SHARE OF THE DAILY MEDIA UNIVERSE IS DOUBLE THE INTERNET, WHICH BTW INCLUDES USAGE ON MOBILE, TABLETS AND COMPUTERS)

AM/FM Radio comprises 1/4 of the time Americans spend with media each day



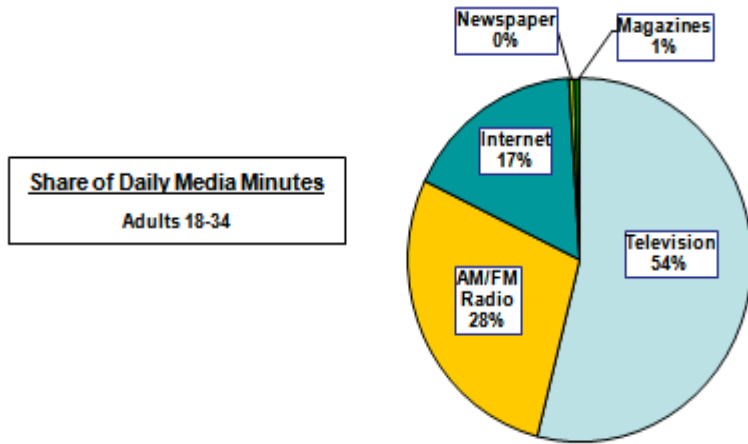
Note: TV includes time-shifted viewing; Internet excludes email, but includes internet usage via PC, mobile or tablet; Newspaper and Magazine includes digital readership.

19

Source: 2012 USA TouchPoints

(COMMENT: RADIO IS A STRONG #2 IN DAILY TIME SPENT TO TV IN SLIDE BELOW)

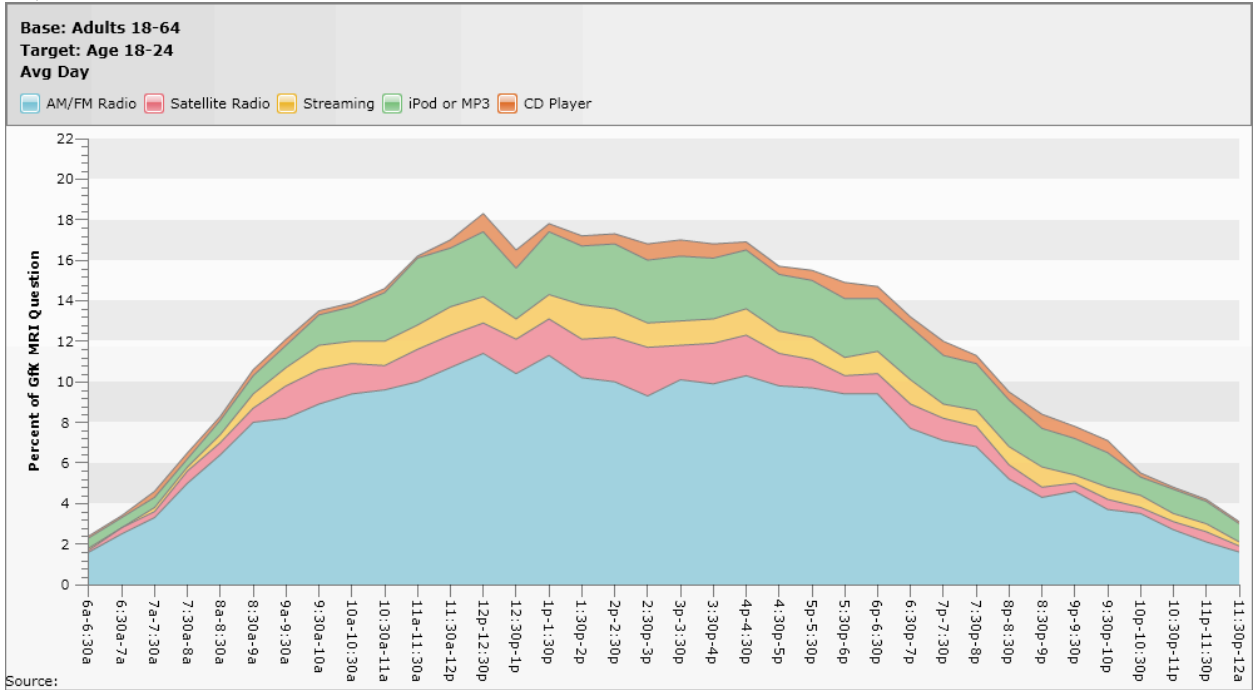
**Among young Adults 18-34,
AM/FM Radio represents nearly 1/3rd of their media day**



Note: TV includes time-shifted viewing; Internet excludes email, but includes internet usage via PC, mobile or tablet; Newspaper and Magazine includes digital readership.

(COMMENT: THIS IS ANOTHER WAY TO VIEW AUDIO USAGE ACROSS THE DAY. RADIO IS LIGHTBLUE DOMINATES ALL HOURS)

18-24



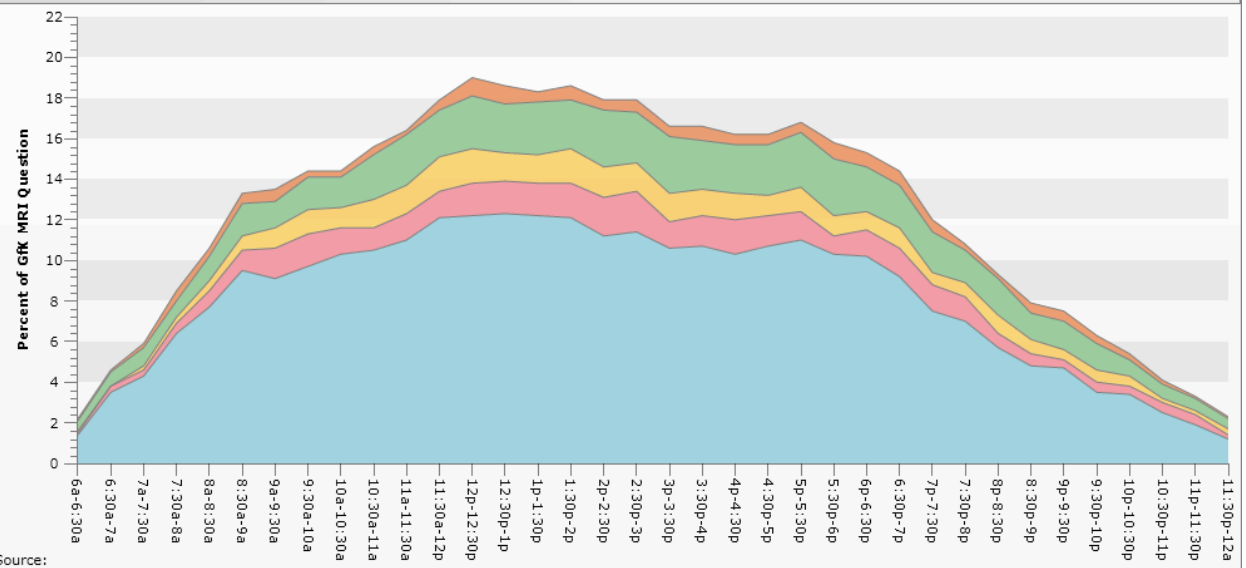
25-34

Base: Adults 18-64

Target: Age 25-34

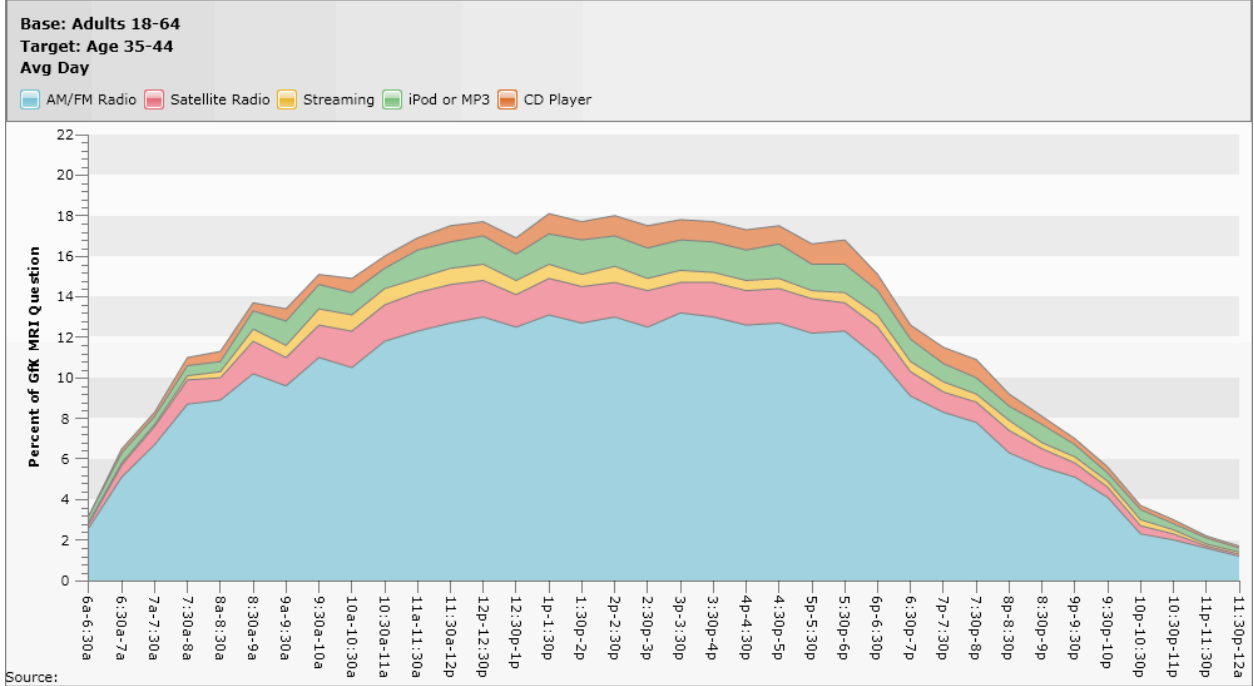
Avg Day

AM/FM Radio Satellite Radio Streaming iPod or MP3 CD Player



Source:

35-44



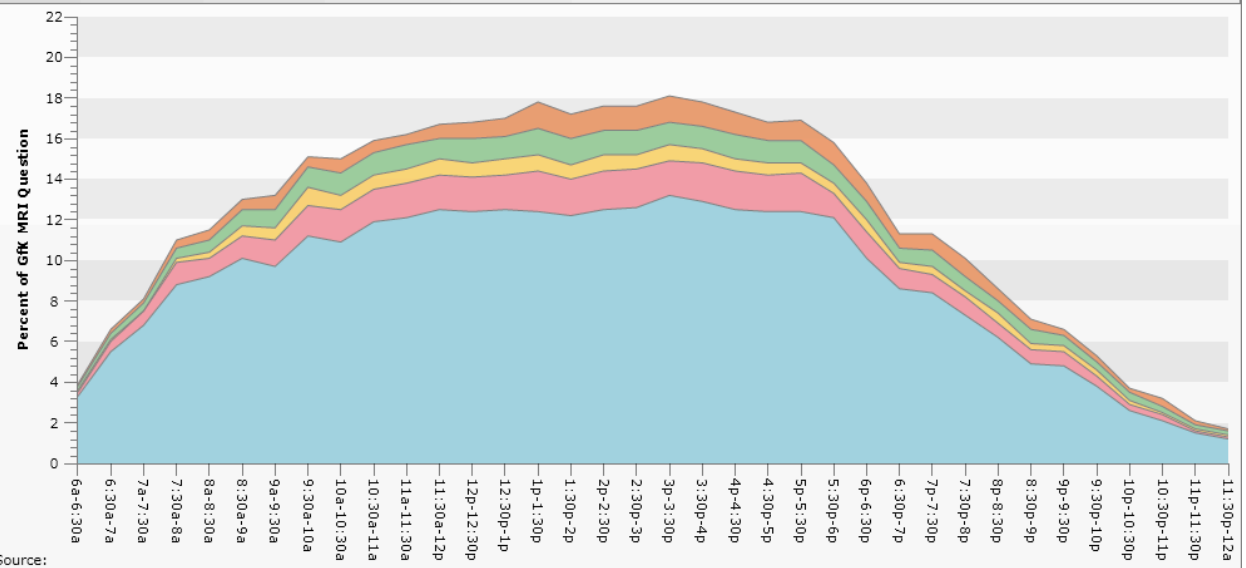
45-54

Base: Adults 18-64

Target: Age 45-54

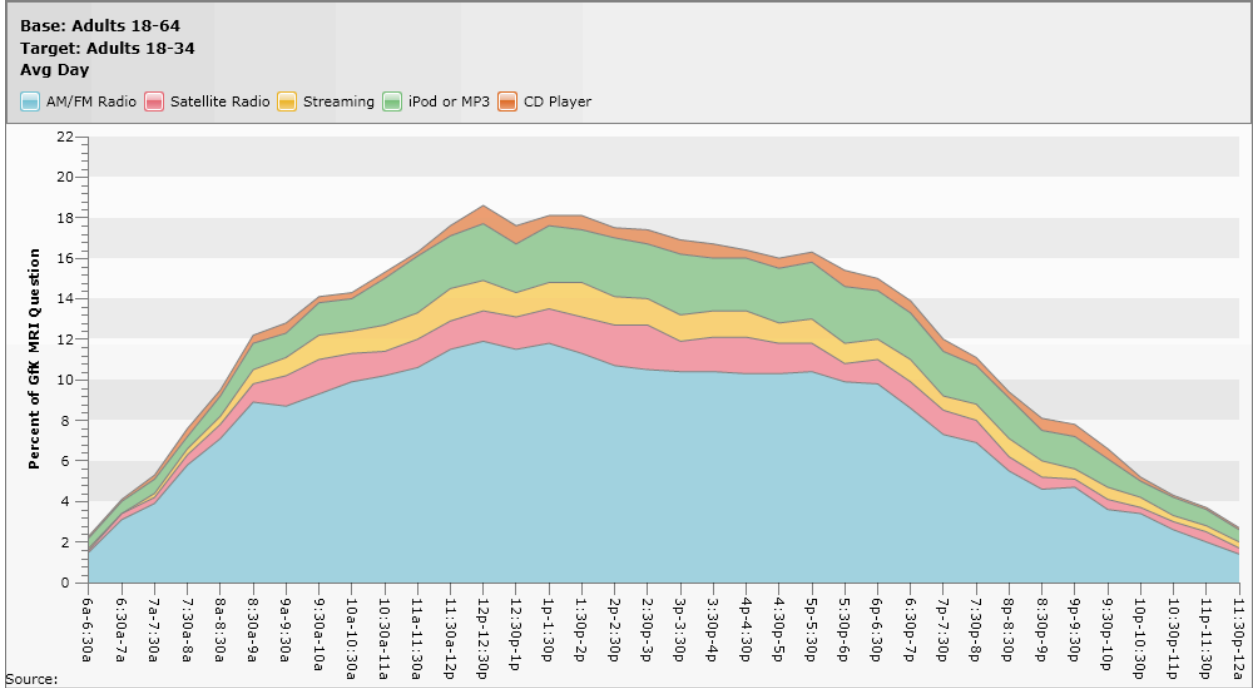
Avg Day

AM/FM Radio Satellite Radio Streaming iPod or MP3 CD Player



Source:

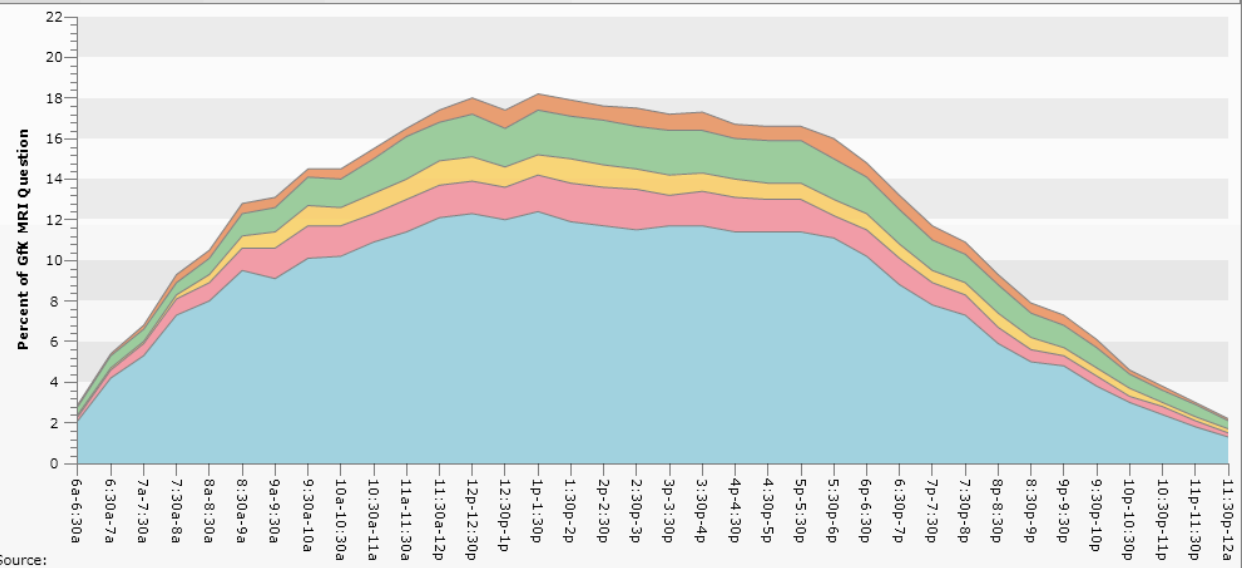
18-34



18-49

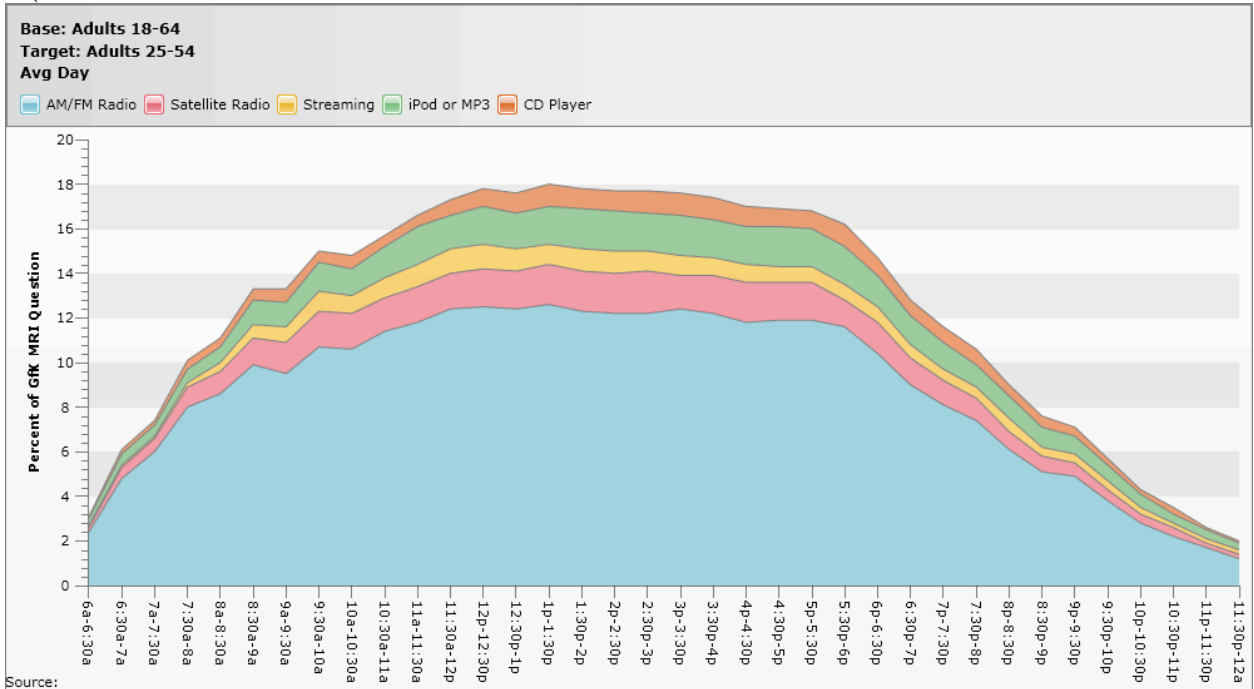
Base: Adults 18-64
 Target: Adults 18-49
 Avg Day

AM/FM Radio Satellite Radio Streaming iPod or MP3 CD Player



Source:

25-54



(COMMENT: MONDAY-FRIDAY RADIO'S REACH EXCEEDS THAT OF THE 4 MAJOR TV NETWORKS AND ALL OF THE CABLE NETWORKS COMBINED (FACTORIZING OUT UNIVISION). CUMULATIVE AUDIENCE BELOW EQUATES TO MON-FRI. 6A-12 MID. THE SECOND COLUMN IS MON-FRI. 6A-6P. THIS IS A HUGE POINT.)

Age Summary: 18-24 Avg Mon-Fri Percent of GfK MRI Question	Cume Audience	6:00 AM-6:00 PM
Which TV Networks were you watching, live or via DVR or Tivo?: ABC , NBC, CBS, Fox	48.2	27.2
All Cable Nets live or via DVR or Tivo EXC Telemundo, Univision	60.1	37
How were you listening to the Radio or other Audio?: AM/FM Radio	53.5	47.9
Source: USA TouchPoints 2012.1 - Base: Adults 18-64		

Age Summary: 18-34 Avg Mon-Fri Percent of GfK MRI Question	Cume Audience	6:00 AM-6:00 PM
Which TV Networks were you watching, live or via DVR or Tivo?: ABC , NBC, CBS, Fox	49.9	28.6
All Cable Nets live or via DVR or Tivo EXC Telemundo, Univision	57.1	34.3
How were you listening to the Radio or other Audio?: AM/FM Radio	55.8	50.7
Source: USA TouchPoints 2012.1 - Base: Adults 18-64		

Age Summary: 25-34 Avg Mon-Fri Percent of GfK MRI Question	Cume Audience	6:00 AM-6:00 PM
Which TV Networks were you watching, live or via DVR or Tivo?: ABC , NBC, CBS, Fox	51.2	29.5
All Cable Nets live or via DVR or Tivo EXC Telemundo, Univision	55	32.3
How were you listening to the Radio or other Audio?: AM/FM Radio	57.5	52.8
Source: USA TouchPoints 2012.1 - Base: Adults 18-64		

Age Summary: 35-44 Avg Mon-Fri Percent of GfK MRI Question	Cume Audience	6:00 AM-6:00 PM
Which TV Networks were you watching, live or via DVR or Tivo?: ABC , NBC, CBS, Fox	63.9	42.1
All Cable Nets live or via DVR or Tivo EXC Telemundo, Univision	60.3	36.4
How were you listening to the Radio or other Audio?: AM/FM Radio	66	61.3
Source: USA TouchPoints 2012.1 - Base: Adults 18-64		

Age Summary: 45-54 Avg Mon-Fri Percent of GfK MRI Question	Cume Audience	6:00 AM-6:00 PM
Which TV Networks were you watching, live or via DVR or Tivo?: ABC , NBC, CBS, Fox	69.1	47.1
All Cable Nets live or via DVR or Tivo EXC Telemundo, Univision	62.9	38.5
How were you listening to the Radio or other Audio?: AM/FM Radio	63.1	58.8
Source: USA TouchPoints 2012.1 - Base: Adults 18-64		

Age Summary: 18-49 Avg Mon-Fri Percent of Gfk MRI Question	Cume Audience	6:00 AM-6:00 PM
Which TV Networks were you watching, live or via DVR or Tivo?: ABC, NBC, CBS, Fox	57.3	35.7
All Cable Nets live or via DVR or Tivo EXC Telemundo, Univision	58.8	35.4
How were you listening to the Radio or other Audio?: AM/FM Radio	60.4	55.6
Source: USA TouchPoints 2012.1 - Base: Adults 18-64		

Age Summary: 25-54 Avg Mon-Fri Percent of Gfk MRI Question	Cume Audience	6:00 AM-6:00 PM
Which TV Networks were you watching, live or via DVR or Tivo?: ABC, NBC, CBS, Fox	61.7	39.9
All Cable Nets live or via DVR or Tivo EXC Telemundo, Univision	59.5	35.8
How were you listening to the Radio or other Audio?: AM/FM Radio	62.2	57.7
Source: USA TouchPoints 2012.1 - Base: Adults 18-64		

Fact: AMERICANS LISTEN TO 14.6 BILLION Hours of Radio EACH Month
 And ACCORDING TO ARBITRON, LISTENERS TUNE INTO RADIO ON AVERAGE 5
 days per week... on AVERAGE 3.4x per day.

Fact: Many broadcast radio audio competitors involve more solitary
 and introspective listening experiences, where the fan picks only the
 music he or she likes. When listeners want more social listening
 experiences, they still turn to radio.

Wall Street's view of radio may be slowly turning. BRILEY ANALYST
 NICK CAPUANO says he thinks radio remains "undervalued" by the
 markets. CAPUANO says radio has been "wrongly lumped in" with the

fading newspaper and directory business — even though it remains a “very relevant advertising medium” worth a fresh look. Radio’s reach and time spent listening are still strong compared to other media, and Capuano says the audience size and reach for Pandora and Sirius XM radio pale in comparison to broadcast radio. “They are dwarfed by the reach and time spent listening to radio,” he tells clients. “Also, they lack the ability to offer advertisers the capability to cost effectively target specific demographics in a scalable way.”

Several quotes of interest that succinctly position why radio remains so popular. Do not know the source:

“Radio is life with a microphone, used to ignite a conversation with as many influencers as possible, at one time. On radio, spoken words create a brief sense of personal connection with each listener, in a way newer media can’t really match.”

“A lot of people don’t have fascinating lives. Many do their jobs for the health insurance benefits, their jobs don’t speak to their souls...with radio you can have fun listening, alone in the world without being alone...turn on the radio and your world gets expanded.”

Fact: Super Sunday for Radio too. **Nearly 8% of Americans caught the Super Bowl on radio.** For 23.1 million people the Super Bowl was **also a radio event.** That's how many listeners tuned into **at least part of the game on the radio,** according to **Dial Global's Edison Research study.**

(COMMENT: TRADITIONAL MEDIA - THE BEST WAY TO GET A MESSAGE OUT QUICKLY AND UNIFORMLY)

(COMMENT: WHILE THE WORLD MIGHT BE MORE DIGITAL HUMAN NATURE AND HUMAN WANTS AND NEEDS HAVE NOT CHANGED...IT IS STILL ABOUT FULFILLING THESE NEEDS. DIGITAL IS NOTHING MORE THAN ANOTHER TO FILL THE GAP. NOTHING MORE, NOTHING LESS)

(COMMENT: LIKE THIS POINT)

Fact: Radio consumption is **perceived positively**- unlike TV: **Interestingly,** of **all media,** TV in **particular is seen by some as a potentially "harmful" medium:** people often **feel apologetic or defensive** about the **amount of time they spend watching TV.** Radio on the **other hand is often seen as having a positive role in people's lives - keeping them company,** giving them **information and allaying feelings of loneliness or isolation.** **No one has ever said too much radio might be harmful.**

Fact: Radio is different from Print. Rather than being like newspapers and magazines, radio is far more like television. Similar to TV, radio is ad-supported and free to consumers, whereas print, while ad-supported, also charges subscription fees, which has contributed to their problems. Additionally, unlike print and newspapers drastic decrease in penetration, radio has suffered no audience decline.

(COMMENT. THERE IS VALUE TO LETTING PEOPLE SOAK IN THE CONTENT AND MESSAGING. STUDIES HAVE SHOWN THAT PEOPLE WHO ARE MORE RELAXED ALLOW MESSAGING THROUGH THEIR DEFENSES. THIS MESSAGING IS ABSORBED PASSIVELY AND IMPLICITLY. FOR MORE ABOUT THIS TYPE OF LISTENING CHECK OUT THE CHAPTER TITLED, "THE SCIENCE OF SOUND".)

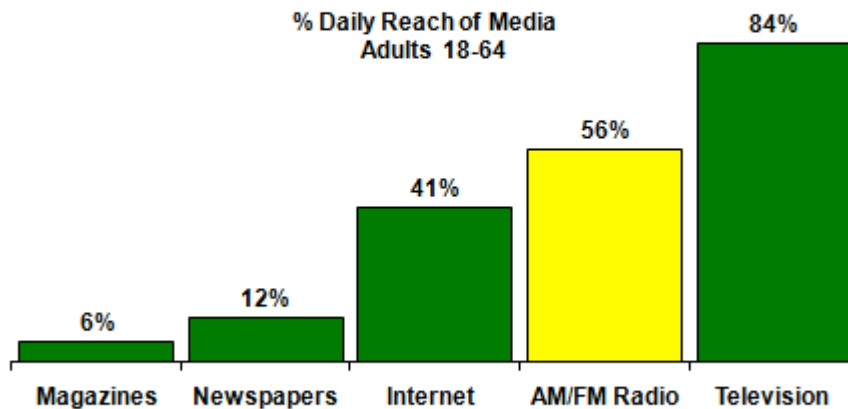
Fact: As advertiser spending continues to more closely reflect the amount of attention consumers give to individual media, each will fare differently. For example, TV and radio are holding on to their audience. One reason for this is that television and radio remain the only mediums where the message is still sit back, relax and let us entertain you- "soak in rather than seek out". This is incredibly appealing proposition to many people in this fast paced society.

The following quote by Michael Link, VP of Methodological Research at the Nielsen Company might be several years old, but the 2012 USA TouchPoints data and other research confirm its

validity today: “There are a lot of critics out there who want to write off broadcast radio, but this analysis of real-time media consumption shows that it continues to play a very strong role”.

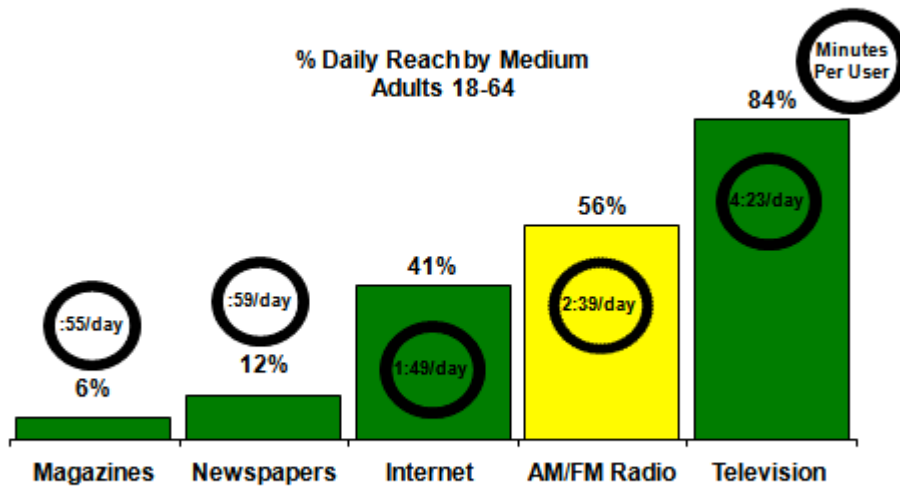
Several 2012 USA Touchpoint slides follow. Radio is powerful...note how Newspaper and Magazine fare:

**Radio is the #2 reach medium
...ahead of the Web, Newspapers and Magazines**



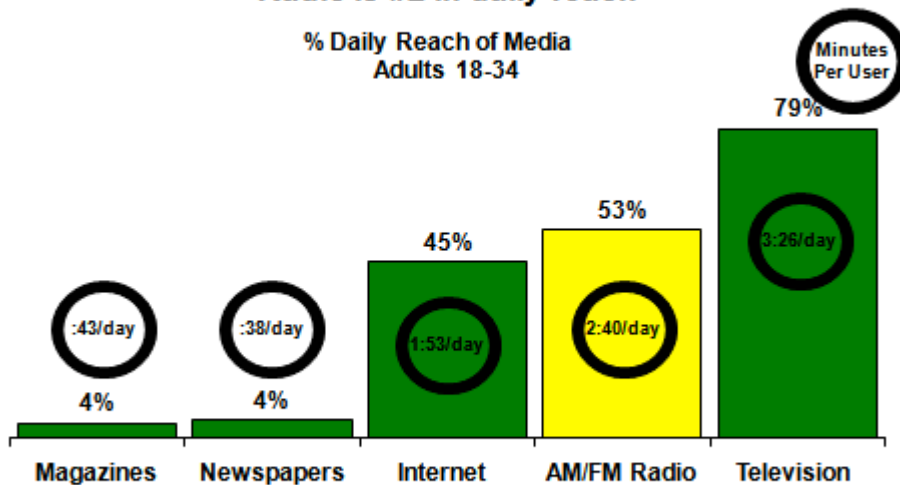
Note: TV includes time-shifted viewing; Internet includes via PC, mobile & tablet; Newspaper and Magazine includes digital readership.
Source: 2012 USA TouchPoints

Radio listeners spend significant time with it daily



Note: TV includes time-shifted viewing; Internet excludes email, but includes internet usage via PC, mobile or tablet; Newspaper and Magazine includes digital readership.
Source: 2012 USA TouchPoints

Even among young adults 18-34, Radio is #2 in daily reach



Note: TV includes time-shifted viewing; Internet excludes email, but includes internet usage via PC, mobile or tablet; Newspaper and Magazine includes digital readership.
Source: 2012 USA TouchPoints

(COMMENT: CONFIRMS 2012 LYN BURNS STUDY- MORE OUTLETS LEADS TO MORE CONSUMPTION. WHILE RADIO TSL IS HIGHER IN THE MRI RESEARCH RADIO'S RELATIVE RANKS THE #2 MEDIUM TO TV REMAINS CONSTANT)

THE INFINITE DIAL 2011 STUDY: NAVIGATING DIGITAL PLATFORM SHOWED THAT AMERICANS ARE SPENDING MORE TIME WITH MEDIA- AN HOUR AND 21 MINUTES MORE PER DAY WITH MEDIA TODAY THAN IN 2001. ALL OF THE NEW TECHNOLOGY IS MAKING IT EASIER TO CONSUME MEDIA AND THE 2011 ESTIMATES FROM MEDIAMARK RESEARCH SHOWS RADIO'S SIGNIFICANCE IN THE MEDIA LANDSCAPE CONTINUES TO BE STRONG. IT'S THE #2 REACH MEDIUM WITH DAILY LISTENING OVER 3 HOURS/DAY. THE MEDIAMARK RESEARCH SHOWED LOWER DAILY REACH FOR RADIO THAN THE NIELSEN CRE STUDY DID BUT APPRECIABLY LONGER TSL. (NEWSPAPER AND MAGAZINE DAILY REACH FAR HIGHER THAN ANY OTHER STUDY WE'VE SEEN. ONE REASON COULD BE THAT GfK MRI IS THE PRINT INDUSTRY'S EQUIVALENT OF ARBITRON- ALL OTHER STUDIES SHOW MUCH LOWER USAGE.)

Gfk MRI Media Day (2011)

	Television	Radio	Internet	Newspaper	Magazines
% Daily Reach (A18+)	81%	63%	57%	41%	27%
Minutes per user	305	182	201	72	74
Hrs:Min/Day	5:05	3:03	3:22	1:13	1:15

(COMMENT. WHILE SOCIAL MEDIA CONTINUES TO GARNER A LOT OF ATTENTION, BROADCAST RADIO'S POPULARITY CONTINUES TO DWARF SOME OF THE INTERNET'S AND SOCIAL MEDIA'S "BIGGEST PLAYERS")

The Social Network Called Radio is **75%** Bigger Than the Social Network Called Facebook Among Adults 18-34

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

- **75%** more will use Radio than will go to facebook (48.5 vs 27.6 million)
- **100%** more will use Radio than will go to Google Search (48.5 vs 24.3 million)
- **210%** more will use Radio than will go to Youtube (48.5 vs 15.6 million)
- **1570%** more will use Radio than will go to Twitter (48.5 vs 2.9 million)

Every day, 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 Jan-Mar 2012; RADAR March 2012, persons 18-34, 6A - Mid



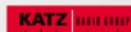
The Social Network Called Radio is **120%** Bigger Than the Social Network Called Facebook Among Adults 25-54

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

- **120%** more will use Radio than will go to facebook (91.9 vs 41.5 million)
- **140%** more will use Radio than will go to Google Search (91.9 vs 38.1 million)
- **470%** more will use Radio than will go to Youtube (91.9 vs 17.6 million)
- **3280%** more will use Radio than will go to Twitter (91.9 vs 2.7 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 Jan - Mar 2012; RADAR March 2012, persons 25-54, 6A-Mid



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 (179.6 vs 64.4 million)
- **210%** more will use Radio than will go to Google Search (179.6 vs 57.8 million)
- **505%** more will use Radio than will go to Youtube (179.6 vs 29.7 million)
- **3550%** more will use Radio than will go to Twitter (179.6 vs 4.9 million)

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

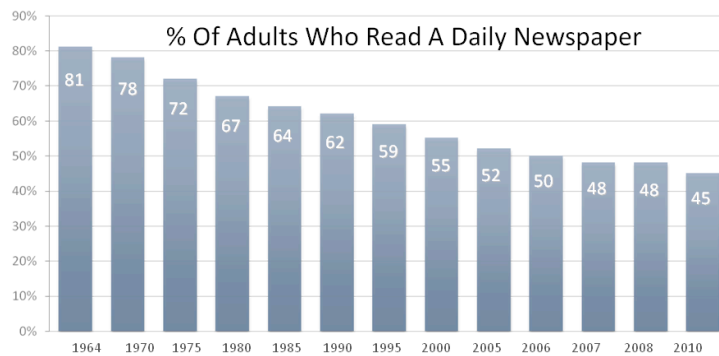
Sources: comScore Inc Ratings for Jan – Mar 2012; RADAR March 2012, persons 12+, M-Su 6A-Mid; **KATZ** 100.1100

NEWSPAPERS IN THE 2012 MEDIA UNIVERSE ARE THREATENED AND CONTINUES TO LOSE READERS. DAILY NEWSPAPER CIRCULATION IS DOWN -44% OVER THE PAST 46+ YEARS.

NETWORK TV'S TOP 20 SHOWS ARE ALSO DOWN QUITE STEEPLY, -45%, OVER THE PAST 16 YEARS.

(COMMENT. THE EXACT OPPOSITE OF RADIO. NO DECLINE IN SIGHT)

Newspaper is trending down



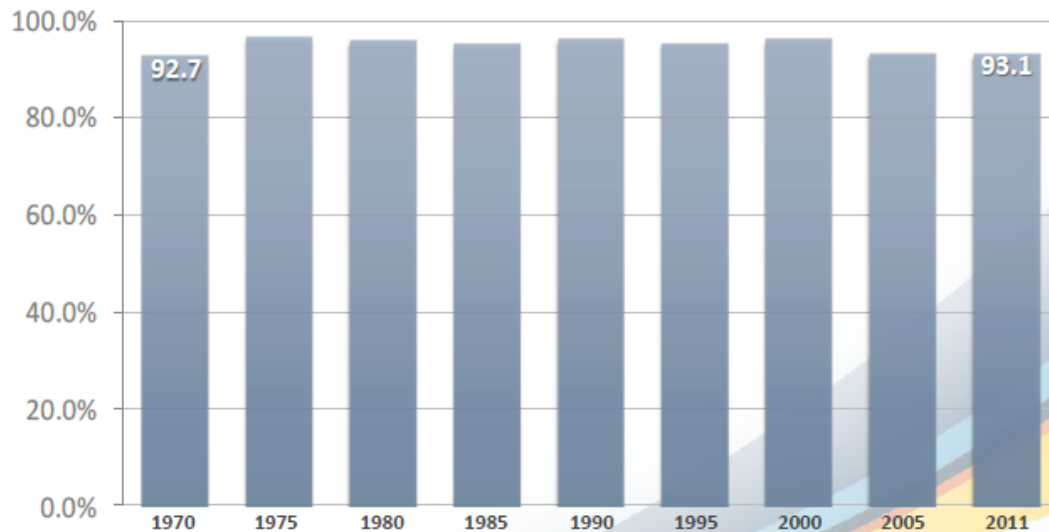
Source: Veronis Suhler Stevenson Communication Industry Forecast 2010,
Lehman Brothers Newspaper Fact Book, March 2008

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(COMMENT: RADIO'S WEEKLY REACH IS HIGHER THAN 1970!-
TREMENDOUS STAYING POWER. NOTE THAT MEDIA OPTIONS OVER
THE PAST 30 YEARS HAVE INCREASED MORE THAN 10 FOLD)

Weekly Radio Reach: 2011 Higher than 1970!

Percentage of U.S. 12+ Population Using Radio Every Week



Source: RADAR Time Spent Listening Per Week Report (c) Arbitron: Monday-Sunday 24 Hours / Persons 12+, RADAR 111 December 2011

Per highly respected research company, Millward Brown, Radio is:

- More intimate/personal than TV

- Less limited to home with listening occurring in many places

- Listeners often more loyal to specific stations

- Benefits from "imagery transfer" from TV commercials

- Usage is less seasonal

(COMMENT: AMAZING STUDY. OF ALL THE GADGETS INVENTED,
RADIO IS #2)

Fact: Radio ranked #2 in Popular Mechanics List of the 101

Gadgets That Changed The World - behind the smartphone

and ahead of TV. 2011 &E produced show, in partnership with
Popular Mechanics, rated all of the most important, innovative, and
incredible devices in history.

Popular Mechanics' 101 Gadgets That Changed the World

Radio scores as the second greatest gadget of all time!

1. Mobile/Smartphone
2. **RADIO**
3. Television
4. Hypodermic Syringe
5. Personal Computer
6. Portable Air Conditioner
7. Telephone
8. Phonograph
9. Alarm Clock
10. Light Bulb
11. Dry Cell Battery
12. Bicycle
13. Match
14. Typewriter
15. Modem
16. Transistor Radio
17. Handheld GPS
18. Vacuum Cleaner
19. Brownie Point and Shoot Camera
20. Remote Control
21. Answering Machine
22. VCR
23. Laptop
24. Sewing Machine
25. Hi-Fi
26. Crescent Wrench
27. Blackberry
28. Electric Guitar
29. Camcorder
30. CD Player
31. LED
32. Computer Mouse
33. Microwave Oven
34. Digital Camera
35. Microphone
36. 8mm Camera
37. Wristwatch
38. Digital HDTV
39. Electric Drill
40. Wi-Fi Router
41. Pocket Calculator
42. MP3 Player
43. Polaroid Camera
44. Floppy Disk
45. Sony Walkman
46. Fire Extinguisher
47. Leatherman
48. Game Boy
49. Circular Saw
50. Cassette Tape
51. Push Lawnmower
52. Kindle E-reader
53. Car Jack
54. Ballpoint Pen
55. CB Radio
56. Tape Recorder
57. Hair Dryer
58. Outboard Motor
59. CD-ROM
60. Moog Synthesizer
61. Smoke Detector
62. Charcoal Grill
63. Lunchbox
64. Derringer
65. Zipper
66. Tape Measure
67. Binoculars
68. Coleman Lantern
69. Electric Toothbrush
70. Boombox
71. Kodak Carousel
72. Stopwatch
73. Printer
74. Safety Razor
75. Electric Blanket
76. Chain Saw
77. DVD players
78. Can Opener
79. Swiss Army Knife
80. Spincast Fishing Reel
81. Leaf Blower
82. Flashlight
83. Toaster
84. Drip Coffeemaker
85. Sunglasses
86. Hearing Aid
87. Ginsu Knife
88. Flash Drive
89. Teflon Pan
90. Zippo
91. Digital Video Recorder
92. Picnic Cooler
93. Bra
94. Blender
95. Super Soaker
96. Quick-Release Ski Binding
97. Aerosol Spray Can
98. Roomba
99. Stapler
100. Fiberglass Fishing Rod
101. Duct Tape

* To make this list a *Gadget* had to be something one could hold in their hands, mechanical or electric, and be a massed produced personal item. Finalists were selected by a panel of judges assembled by Popular Mechanics™.

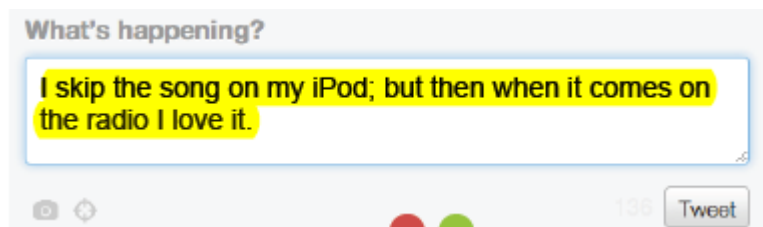
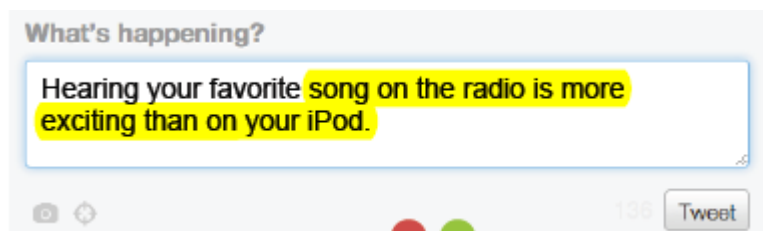
Source : www.popularmechanics.com June 2011

(COMMENT. WHEN WE LISTEN TO THE RADIO WE ARE SHARING THE SAME MOMENT IN TIME WITH THOUSANDS. THERE IS SOMETHING SPECIAL ABOUT THAT. BEING PART OF A TRIBE IS IMPORTANT TO HUMAN. HAVING HUMAN CONNECTION IS IMPORTANT. WE CAN BE ALONE WHEN LISTENING TO THE RADIO BUT NOT BE LONELY. LISTENING TO THE RADIO MAKES US PART OF SOMETHING BIGGER THAN OURSELVES. PART OF AN EXPERIENCE THAT OTHERS SHARE THAT CAN BE DISCUSSED WITH THEM)

Broadcast Radio also possesses a “multiplying” effect.

There really is something almost magical about radio's ability to make music sound more exciting, satisfying and bigger than life.

That's a huge benefit of “broadcasting”. We call this radio's music “multiplier” effect. It's when you listen, enjoy, and sometimes turn up the volume of a song on the radio that you'd normally click past on your iPod or “thumb down” on your personalized internet station. Two actual tweets follow- taken from the 2012 Radioscope study:



Songs played on air seem to resonate differently due to a combination of serendipity and surprise. Maybe this is why many of us are more likely to crank up the music when it comes on the radio than our iPod. Have you ever noticed that a movie viewed in a theatre is usually a more powerful viewing experience than when viewed alone at home on TV? The same phenomenon is at play when listening to music on the radio. The contextual and social environment in which a product is consumed does make a difference.

THE ACT of downloading songs to iPods/MP3's or liking/disliking songs on **INTERNET STATIONS** **ELIMINATES ANY SEMBLANCE** of surprise. **And without surprise it's difficult to experience delight.** **Is it possible that we're personalizing and "thumbing" our music up or down to the point of emotional detachment?** **Radio on the other hand, due to its serendipitous nature, has the ability to delight far beyond that of other musical alternatives.**

Social bonding or a para-social kind of relationship is also at work and exclusive to radio. It revolves around the kinship listeners believe they share with the personalities, which leads to a "he/she gets me" response from a personal and musical standpoint, which enhances the enjoyment that leads to a richer listening experience.

But there's got to be more to radio's magic than this music "multiplier" phenomenon. No matter how hard the online audio pure plays try they will never be able to match radio's ability to provide an intimate shared experience—another human being sharing the same moment in time with the listener, offering up tidbits of new information about an artist or song, while introducing them to new music being played in the context of their favorite station's playlist. This is radio and this is will always be special- the ability to provide "social currency".

Thinking of online music options as radio simply because both play music is analogous to categorizing billboards, skywriting,

magazines and newspapers as similar mediums because all four are dependent upon the written word. While radio and the internet audio alternatives both play music there's a cavernous difference between the two audio options and why and how often they are utilized.

Online music services certainly have a place in the new audio world but there is a certain soullessness about them, a sterility that is absent from broadcast radio. Both Clear Channel and CBS are now playing in this space to round out their audio assets, having created iHeartRadio and Last.fm respectively. But no matter how it might be sliced, diced or rationalized that these internet playlists are radio, **it is difficult to not to feel like Will Smith, in the movie, "I Am Legend" - isolated, disconnected and alone if you are exposed to them for too long.**

(COMMENT: Radio's ability to influence frame of mind which is key to commercial receptivity. LIKE THE ICE CREAM ANALOGY)

2011 study commissioned in the U.K. by the [Radio Advertising Bureau](#) concluded that listening to the radio makes people happier than watching TV or surfing the internet. 1,000 Britons participated in [the study](#), using their smartphones to respond to questions about their media consumption and emotional mindset at various times of the day.

"On **AVERAGE**, when **CONSUMING** radio, **HAPPINESS & ENERGY SCORES INCREASE** by 100% **AND** 300% **COMPARED TO** when **NO MEDIA IS BEING CONSUMED**," **THE STUDY** found. **BUT HAPPINESS INCREASED** most when **THAT MEDIA WAS THE RADIO**.

RADIO IS A kind of "**LIFESTYLE support system**," **THE AUTHORS** wrote, **THAT HELPS PEOPLE FEEL BETTER AS THEY GO ABOUT THEIR DAYS**. **Many** respondents didn't **REALIZE** how **IMPORTANT** radio **WAS** in **THEIR LIVES** until **THEY HAD PARTICIPATED** in **THE EXERCISE**.

TO MICHAEL C. KEITH, **A** professor **AT BOSTON COLLEGE** **AND A LEADING SCHOLAR** in history **AND ELECTRONIC MEDIA**, **THESE CONCLUSIONS COME AS** no surprise.

"Why **ELSE** do **PEOPLE LISTEN** to **MUSIC RADIO**, other than to get **ENJOYMENT** out of it?" he **ASKED** HuffPost in **AN INTERVIEW LAST WEEK**.

"**PEOPLE DON'T LISTEN** to **RADIO** to be depressed, **CERTAINLY NOT** when it **COMES TO ENTERTAINMENT RADIO** or **MUSIC RADIO**. **THE WHOLE IDEA OF LISTENING TO RADIO IS TO GAIN COMPANIONSHIP AND, AT THE SAME TIME, ENJOYMENT.**"

INDEED, **THE STUDY'S PARTICIPANTS CLAIMED** to **EXPERIENCE** "**PEAKS AND TROUGHS**" while **CONSUMING TV AND ONLINE MEDIA**, but **RADIO** provided **A "CONSISTENT ENVIRONMENT THEMED AND SHAPED"** to **SUIT THEIR NEEDS AT ANY GIVEN MOMENT**.

GENERALLY, **WE CAN ALL AGREE**, **PEOPLE LIKE LISTENING TO MUSIC**. **WE ALL HAVE A STATION** we prefer with **MUSIC** we know **WE'LL LIKE**, **AND UNLESS**

we just broke up with our significant others, for the most part we're choosing music that will make us feel good.

"Radio is like ice cream," Keith said. "You choose the station that tastes best to you -- the flavor you like the best is going to give you enjoyment."

Whereas trolling online might occasionally present you with an uncomfortable activity -- checking your bank statement perhaps, looking for jobs or watching a really non-cute cat do something awful -- television has always been considered the ultimate in escapism. However, many respondents claimed they experienced a low after watching their favorite programs, as they were suddenly plunged back into "real life."

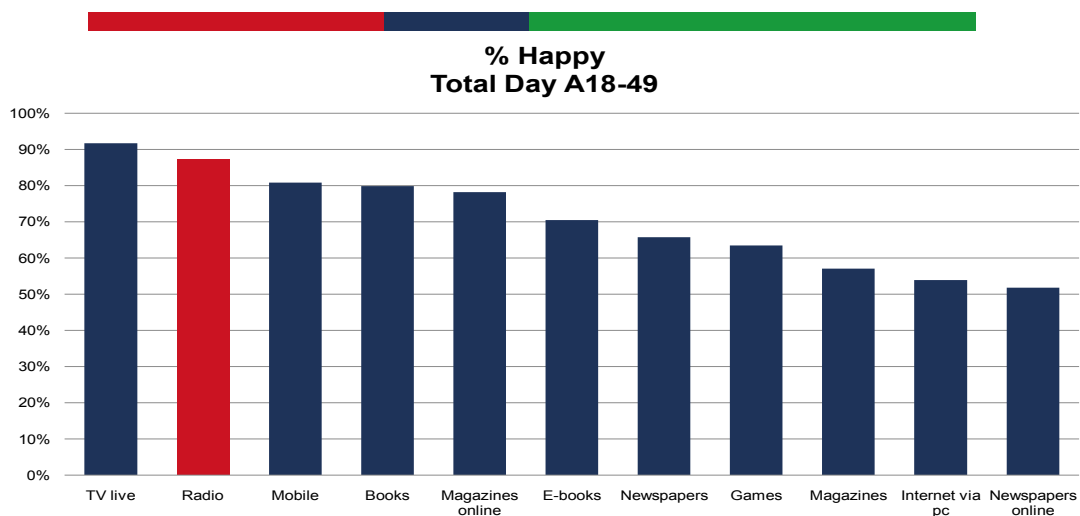
Radio, on the other hand only improved and supported peoples' daily activities, like cleaning up around the house, or getting ready in the morning. Many respondents also listened to the radio while they did other work online.

"More than anything else," Keith said. "[Radio] is used to provide companionship, to soothe, to reassure, to make happy."

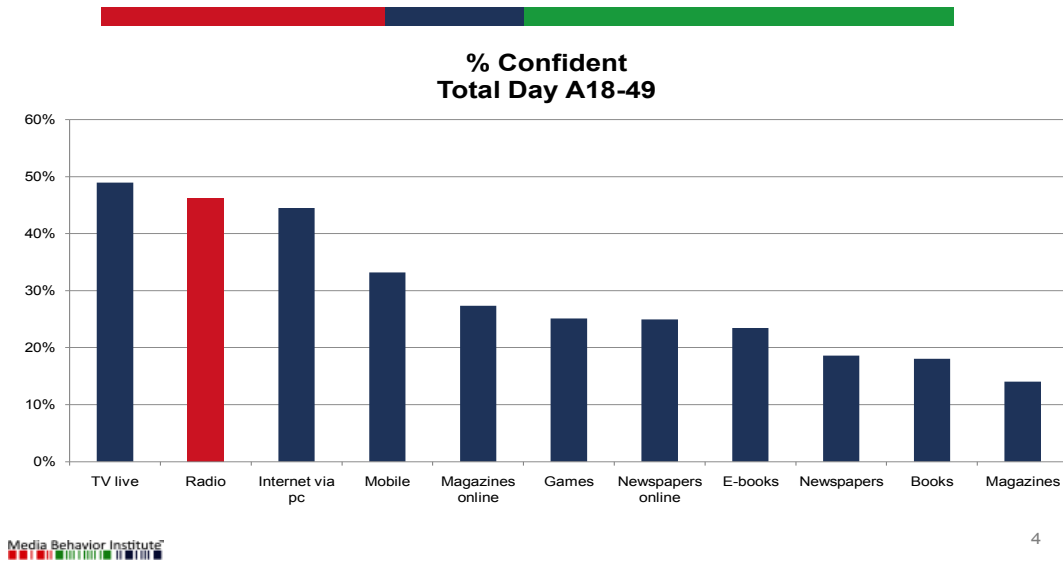
Radio is such an integral part of our daily lives that perhaps we've forgotten how it truly affects us." Lot of the new media gets more press, more buzz, more attention," Bill Rose of Arbitron explained. "But people use radio more year over year."

CIMM: THE COALITION for INNOVATIVE MEDIA MEASUREMENTS is using **TOUCHPOINTS** methodology from **THE U.K. SMARTPHONES** were given to **THE RESPONDENTS** who were prompted every 30 minutes to fill in their **MEDIA usage AS WELL AS MINDSET. THE USA TOUCHPOINT RESULTS** parallel the U.K. findings re: **RADIO'S ABILITY TO POSITIVELY AFFECT PEOPLE'S** moods:

“Happy” audiences flock to Radio



Audiences are “Confident” while listening to Radio



Survey **RESULTS RELEASED** In February 2012 by **BrandSpark INTERNATIONAL** (below) In **partnership with BETTER Homes And Gardens.**