

1 - Radio's Place in the Media Landscape I

The kielbasa case study: how Millennials sold Hillshire Farm on radio. Like hearty mustard, radio goes well with kielbasa. That was one of the takeaways from research into millennial shoppers prepared for Hillshire Farms and presented at this week's Advertising Research Foundation conference in New York. The study was conducted by Sequent Partners and the Media Behavior Institute, which were enlisted by the meat company to try to figure out how to reach the next generation of kielbasa consumers. "Radio comes out the strongest with 50% reach in the half hour before shopping — the strongest way to reach millennials," founding partner Jim Spaeth told the crowd of researchers. That compares to about one-third who were watching TV, surfing the web, texting or using social networks. Email and satellite radio were even further back, the research shows. Besides shattering the myth that millennials don't listen to radio, the research also suggests a bottom may've been reached for print after several years of steep declines. "Radio is still important and so is print to some degree, so it's not exclusively a new media play with millennial consumers," said Alice Sylvester, COO of Sequent Partners and the Media Behavior Institute. The research does show millennials slightly under-index for AM/FM listening, but that's more than made up for by radio's digital assets. They're eight-time more likely to stream radio than older adults. And they're twice as likely to stream radio on their mobile phones. Sylvester can't specifically say how Hillshire Farms used the information, but she said that internally there was already some debate about putting ad dollars on radio. "What they didn't have was the role of radio in the lives of consumers in their category quite as obvious as that," she said.

ARBITRON: "RADIO LISTENING IS UP"

6-12-13

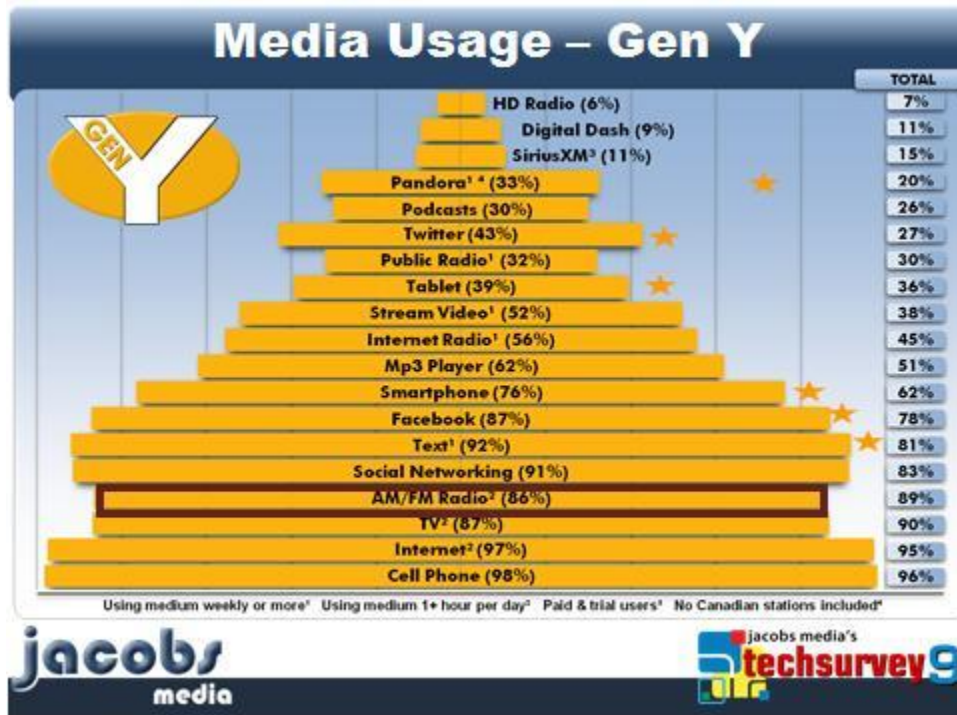
Arbitron released another RADAR National Radio Listening Report today. The report says radio's audience increased year over year, adding more than 430,000 weekly listeners. Arbitron says radio now reaches 242.5 million listeners, or 92 percent of persons 12 and older, on an average weekly basis. Additionally, daily time spent listening to radio among persons age 12 and older held steady versus the June 2012 RADAR report. People 12 and older spend approximately 2 hours and 36 minutes a day with radio.

[Why Gen Y](#)

We can throw the 93% number around all we like, but the bottom line is that radio listening levels vary depending on the group you're looking at.

In a recent series of posts, we've talked about the concerning radio problem centering on lost youth – specifically, the notion that the medium has lost a generation of listeners over the past decade or so.

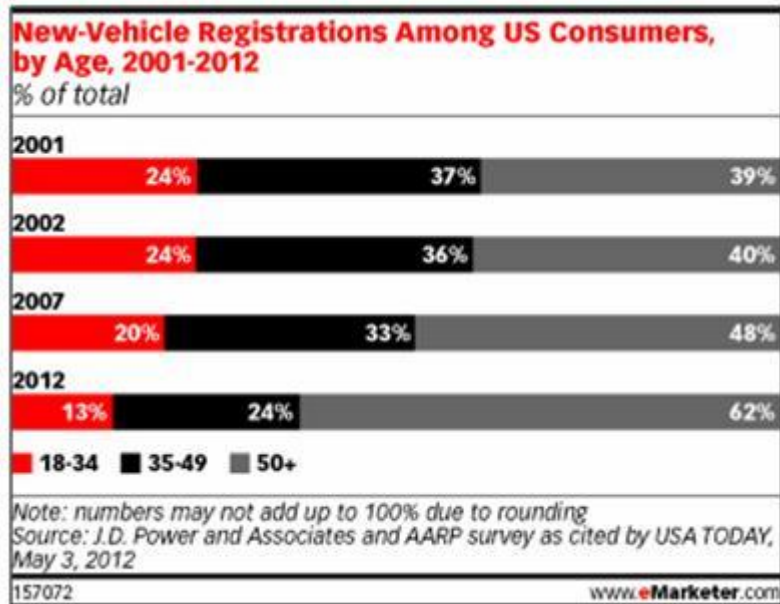
Some might argue that we're actually talking about *two generations* that are simply not as engaged with radio as their parents. Gen Y – or Millennials – is a case in point. Here's their Media Usage Pyramid from Techsurvey9. A look at the black bar below indicates that 86% of these twenty and thirtysomethings listen to radio an hour a day or more. That's below the study average of 89%.



And this pattern intensifies when we examine Gen Z – those 20 and younger. Only 78% of them listen to broadcast radio for that one hour minimum a day.

This may not be an issue for radio today – or even a year or two from now – but the assumption that they'll be back someday is not a logical one. Habits, patterns, desires, and tastes are formed when we're young. The less that new generations of consumers experience radio, the less they'll be connected to the medium as they mature.

The auto companies know this only too well and radio would be smart to watch their moves carefully. A recent eMarketer report outlines the problem – 18-34 year-olds are simply not buying new vehicles like they used to. In just the last decade, the industry has experienced precipitous drops in new car registrations:



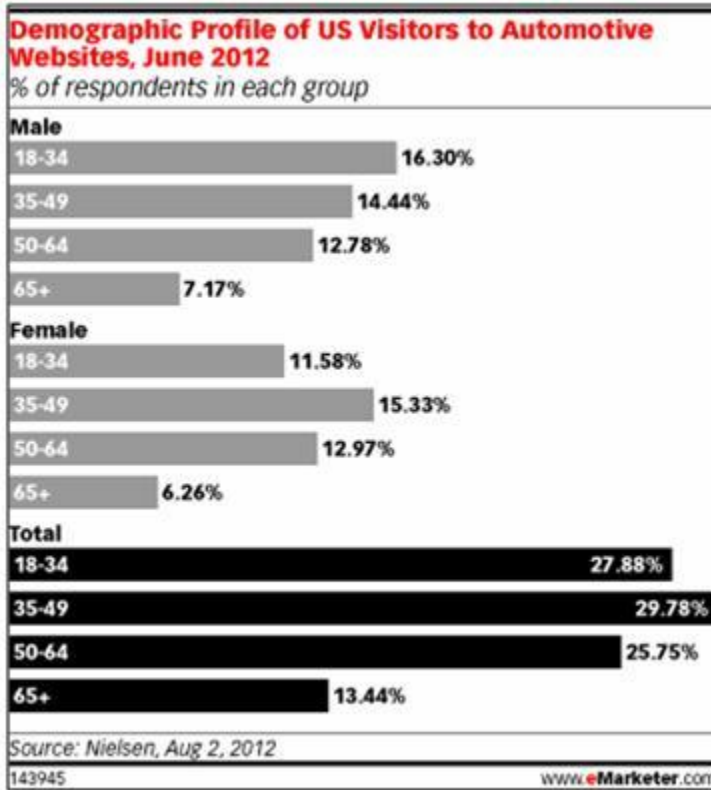
If this looks similar to ratings trends you've seen, the challenges facing both the automobile and radio industries when it comes to Millennials ought to be obvious.

And it's not just the automotive sector. A recently released generation study commissioned for MTV has renewed their energy for digging back in and reconnecting with 12-34 year-olds. Unlike other entertainment brands, MTV cannot rely on aging with its audience. In fact, the president of MTV, Stephen Friedman, **notes** in a recent *New York Times* article, "**Candidly, we were hanging onto Gen Xers a little too long.**"

At Netflix, a new initiative is geared directly at kids (and, of course, their parents). They recently announced a partnership with DreamWorks to create 300 hours of original programming that Netflix can stream to kids all over the planet. As we saw in Techsurvey9, Generation Z is a savvy, smart forward-leaning audience that can pay residuals well down the road – if they get into the habit while they're young.

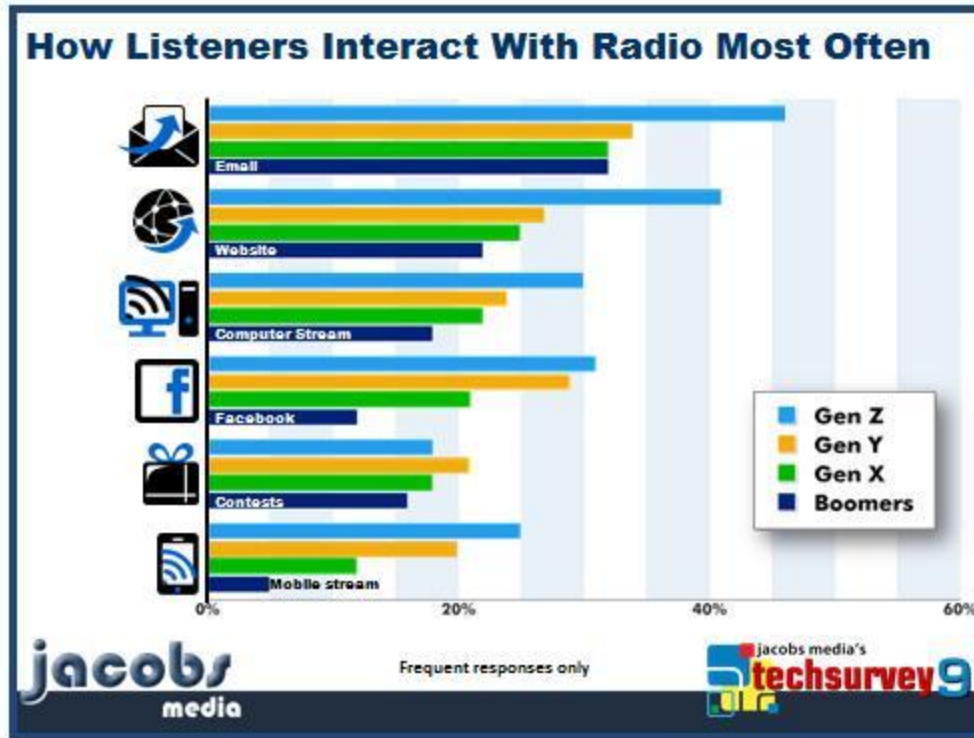
So for the automakers – and radio – what's the answer?

The OEMs are researching the problem and attacking it both strategically and tactically. eMarketer talks about a **Ford partnership with Zipcar** on select college campuses, along with social media initiatives designed to engage students. Digital campaigns via mobile and social are considered the gateways to connecting with Generation Y. And for the OEMs, the good news is that these young consumers are visiting their websites, according to Nielsen data:



And we see this in our Techsurvey, too. While Generations Y and Z may not be consuming as much radio, they are connecting with stations in a myriad of different ways. The notion that broadcasters are getting more “digital traffic” from them than their older brothers and parents is encouraging.

But it boils down to what happens when they arrive at these digital portals – the experience, the content, the value. And that’s where broadcasters need to make a concerted effort to commit and appeal to younger listeners:



Generation Y (gold) is more likely to connect with stations via their websites, Facebook, and mobile. And a look at the next generation – Gen Z (light blue) – an even stronger propensity to connect digitally on all these portals that barely existed five or ten years ago.

So even if radio hasn't built it yet, they're coming. What happens when they get there may tell an important story about radio's future.

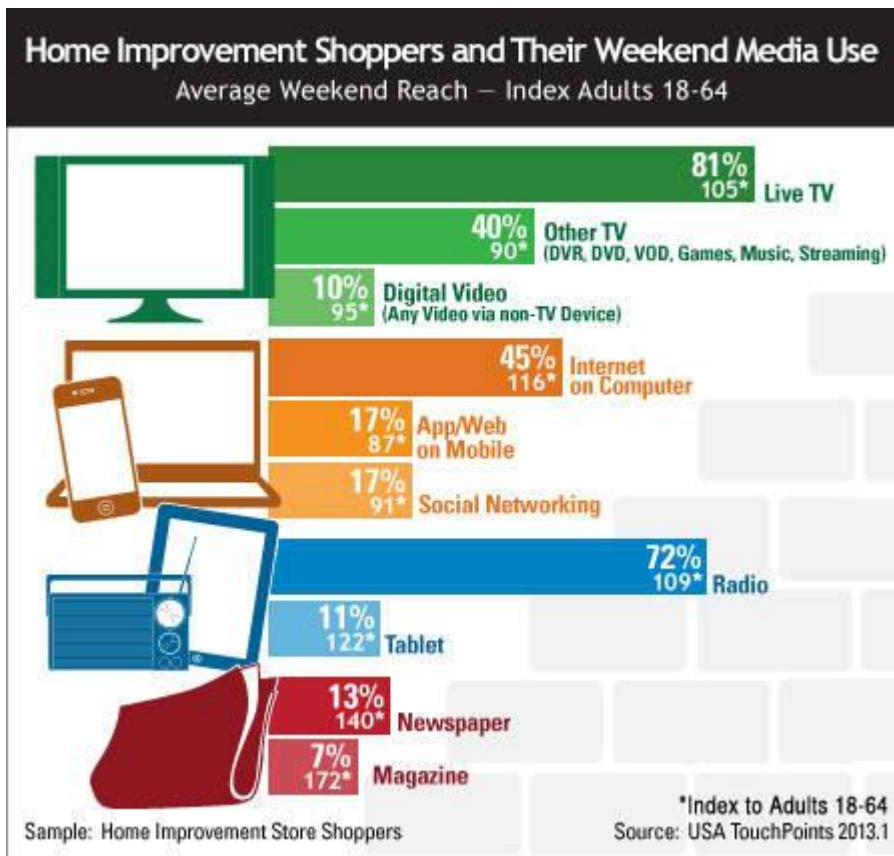
Generation Next or Generation Lost?

Why Gen Y?

Ask any major brand manager and they'll be more than happy to tell you.

The Whole Story - Homes and Gardens (and Media)

by [Mike Bloxham](#), Yesterday, 7:30 AM



Weekends are big for Home Depot and Lowe’s. As countless thousands use the precious two days of “rest” to put in a new deck or acting out the wish list they’ve built from weeks of watching HGTV and trolling around on Pinterest, the cash registers at both Home Improvement stores across the land ring loud and long.

With weekends accounting for so much business, it becomes critical to ensure that potential customers are reached effectively before they are likely to visit the stores.

This USA TouchPoints analysis looks at which media are more or less likely to deliver Home Improvement shoppers on the average weekend by average weekend reach and indexed against adults 18-64.

- Unsurprisingly, Live TV scores the highest reach over the weekend among this group at 81%, with an index of 105.
- Radio comes in second place at 72% (index 109), due in part, to time spent in the car going to the Home Improvement stores, where it works as a path-to-purchase medium right into the parking lot, other stores and generally running errands, socializing etc.
- While Internet use on the computer is lower than it might be during the week, due to less work use, it still places third at 45% and indexes at 116.
- Interestingly, especially in light of the investments in mobile seen in the Home Improvement sector, reach for the use of the Web or apps via cell phones is

relatively low at 17% and under indexes at 87. (That's possibly a factor of the age of the customer base vs. those making the higher levels of use in the broader population.) However, while use of mobile apps and Web may under index, the presence of the medium in-store can outweigh this.

- Perhaps the most intriguing part of the analysis lies in the media that over-index to the greatest extent. Tablets weigh in at 11% reach, but over index at 122. Print, which has been read the last rites more than can be counted, delivers 13% reach for Newspapers and 7% for Magazines. But they over-index to the tune of 140 and 172, respectively.

While the case for TV and Radio are obvious, and the development and use of mobile marketing is largely carried by the medium's proximity to point of sale, print media cannot be expected to fall off the schedule any time soon. Not if we look at the data. Its reach may not be particularly high, but with the right titles, it can deliver the Home Improvement shopper

- **Radio closes in on a final agreement with Sprint for FM on handsets.** "We're in the final stages of an agreement," Emmis CEO Jeff Smulyan told broadcasters yesterday, as he works to bring more broadcasters onboard in the industry's effort to raise \$45 million for Sprint over the next three years. To reach that goal operators are being asked to commit \$10,000 per station per year — or five minutes of inventory a week to be sold on Sprint's behalf. It is unclear how close to the goal Smulyan is, but he said response has been "overwhelming" with most broadcasters opting to turn over some of their unsold inventory to the cause rather than offering to pay cash. It's expected that time will be sold by Katz Radio Group in the largest markets, with a mix of other rep firms and radio networks selling the remaining ad time. Some broadcasters are hoping for a broad Run Of Schedule (ROS) parameter, but it's mostly likely the spots will need to run between 6am and 7pm, according to Smulyan. "To keep it to five minutes a week, it will probably have to be a little bit better inventory," he explained. He said the goal is to divvy up the burden as fairly as possible across big and small markets. While most stations have unsold inventory, some operators have been reluctant to sign a three-year commitment since the impact it may have on national sales isn't entirely certain. **But Smulyan points out that the industry's largest companies contributed almost \$930 million of inventory over six years launching digital radio, adding, "This is a small price to pay."**

Sprint's FM-enabled smartphones will launch first in Kansas City. The goal of radio's \$45 million deal with Sprint is to start rolling out the radio-activated Android- and Windows-based smartphones into the marketplace this summer, perhaps as soon as next month. "That depends on the effectiveness of this fundraising, because it won't launch until we can make a payment as an industry," Emmis CTO Paul Brenner said, adding once Sprint is paid, the smartphones should appear in stores "relatively quickly." **The test market for the rollout will be Sprint's home base of Kansas City.** Brenner said Emmis is working with broadcasters there to make sure that when buyers turn on the handsets, they get as visual an experience as possible. "We really want to come to market with great content," he said. Emmis is encouraging every station to, at the very least, submit a logo so the NextRadio app that will activate FM on the phones is as eye appealing as possible. "When these phones launch, we'll show our listeners that we are an interactive medium," Emmis CEO Jeff Smulyan said. "If we do that I'm pretty certain all the other carriers will jump on this." While AM owners are being asked to commit cash or inventory even though Sprint smartphones will only offer FM, **Smulyan noted that any AM on a translator will be featured.** Meanwhile, discussions

continue with AT&T and Verizon, but it's unclear whether there's been much progress toward getting FM into their handsets. "The most important thing is a successful launch with Sprint," Smulyan said



Radio rules among those planning to buy a new car. New research gives radio sales departments more ammo for returning automotive to the industry's top ad-spending category. Planned vehicle purchasers spend more time with radio —

150 minutes a day — than with any other media. Consumers planning to buy a new ride spend more than 20% of their day with radio compared to second-ranked internet at 18%, according to the Media Audit. **(The internet figures exclude time spent with email.)** Factor in radio's reach and you've got "the ideal medium for car dealers and manufacturers to tell their story," the Media Audit president Bob Jordan says. While the internet is a strong No. 2 at 125 minutes a day (and would be tops if email were included), Jordan notes the web is tremendously fragmented. "Consumers can go to dozens and dozens of websites during the day but radio listeners tend to be loyal to a couple of radio stations," he says, listening on average to about 2.5 radio stations during a week. The news gets better when looking at consumers planning to buy a U.S.-made vehicle. Planned domestic car purchasers are very strong radio listeners, spending more than 177 minutes a day with radio, compared to the internet at 132 minutes and broadcast TV at 103 minutes. Consumers planning to purchase a car in the next 12 months tend to be more financially optimistic than the general market, Media Audit research shows. More than half tend to be more financially optimistic compared to 36% of the general market. The study is based on 68,401 adults interviewed in 87 markets in 2012.

Jacobs Tech Study #9

jacobs media's techsurvey 9

**Radio's Tech Survey
"Digital Generations"**

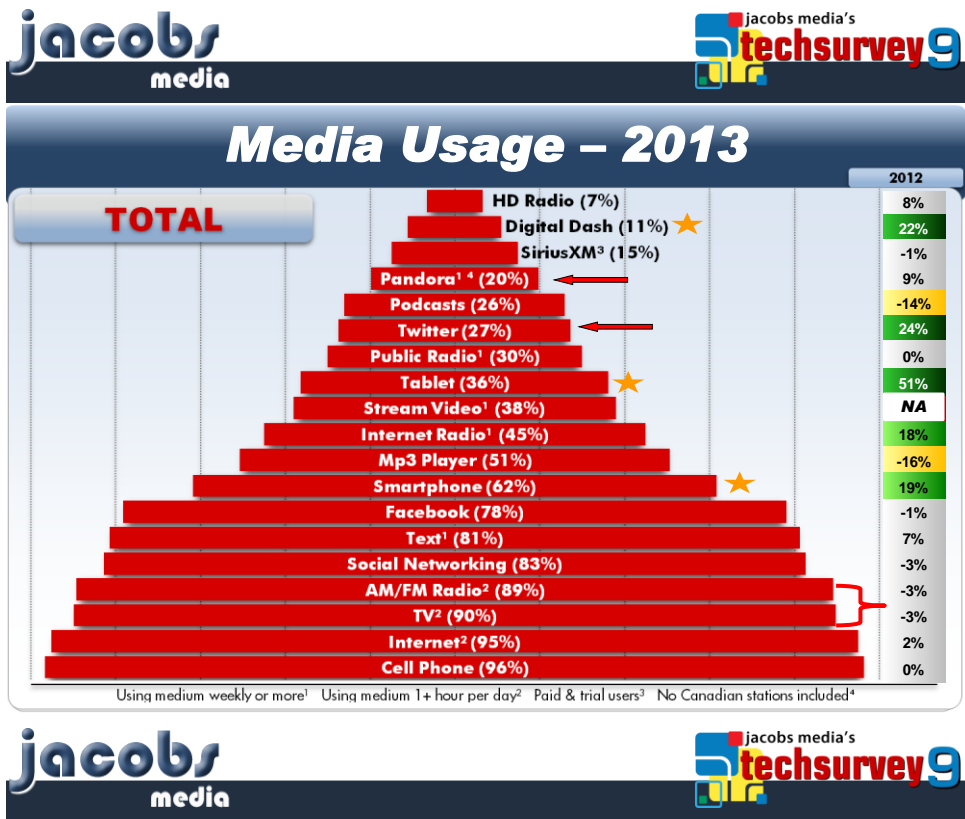
Fred@jacobsmedia.com

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The image is a promotional graphic for a survey. It features the 'jacobs media' logo at the top left. Below it is a stylized graphic of a smartphone with a blue and yellow bar chart overlay. To the right of this graphic is the text 'jacobs media's techsurvey 9'. Below this is the main title 'Radio's Tech Survey "Digital Generations"' in a bold, blue, sans-serif font. At the bottom left is the email address 'Fred@jacobsmedia.com' and at the bottom center is the copyright notice '©Jacobs Media 2013'. The background is a light blue gradient.

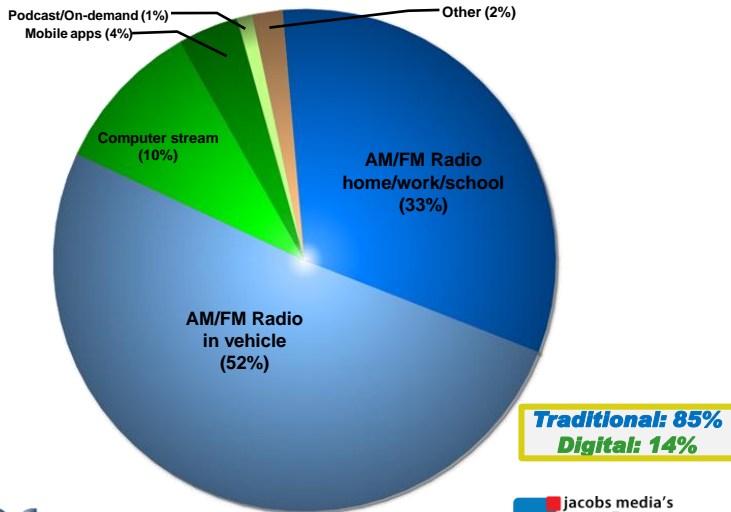
Methodology

- ❖ 264 radio stations in the U.S. & Canada
- ❖ N = 78,111
- ❖ Interview dates: January 29-February 19, 2013.
- ❖ Most respondents are members of station email databases. Some responses were gathered via the station's website or social networking pages.
- ❖ All responses were collected online and weighted using their Fall '12 M-F metro 12+ cume audiences
- ❖ No one station contributed more than 3% to the sample
- ❖ This is a web survey and does not represent all radio listeners nor even each station's audience. It is not stratified to the U.S./Canadian populations and/or their radio formats of choice.



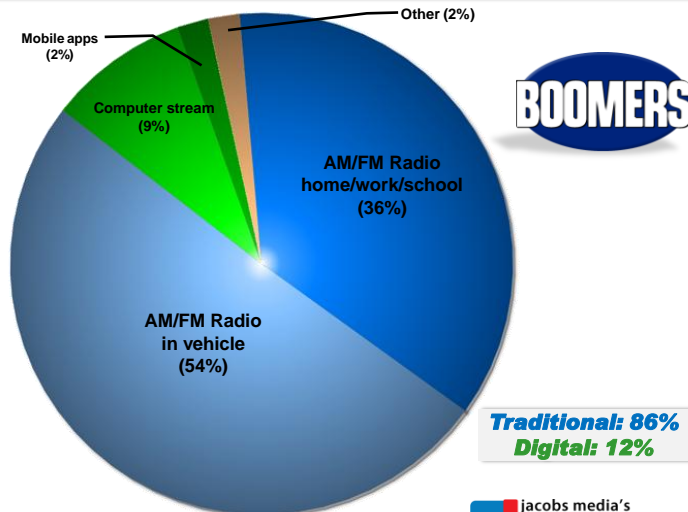
Station Listening Platforms

Total



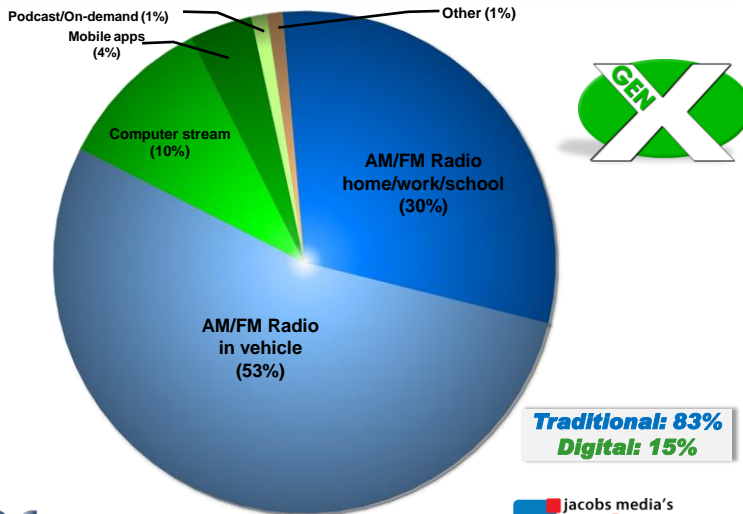
Station Listening Platforms

Boomers



Station Listening Platforms

Gen X

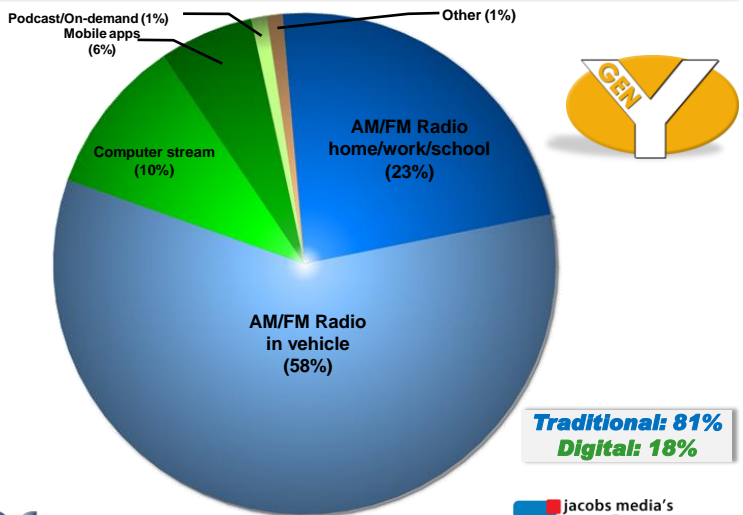


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Station Listening Platforms

Gen Y

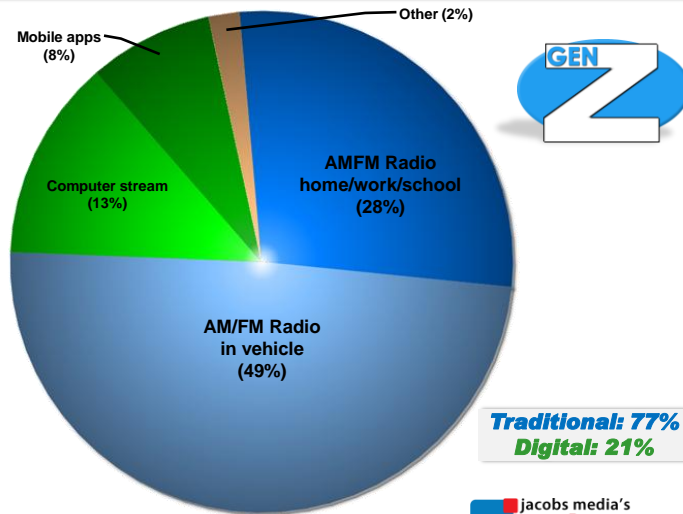


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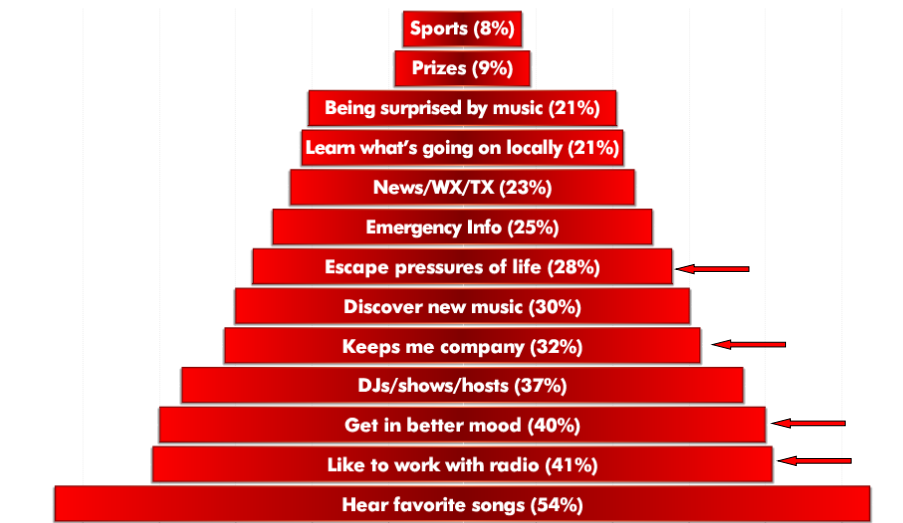
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Station Listening Platforms

Gen Z



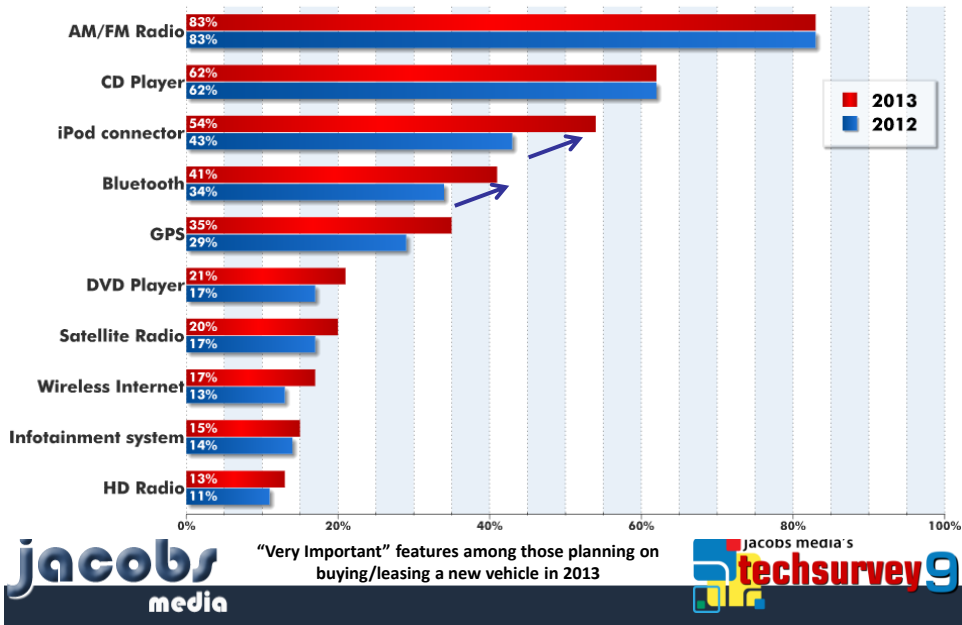
Why Listen To AM/FM Radio



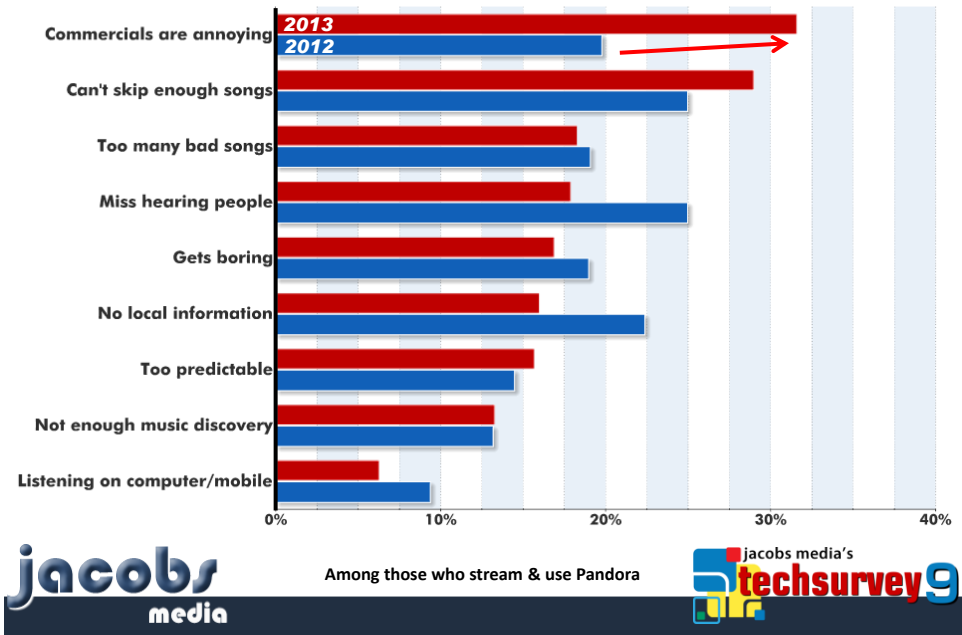
Main Reasons



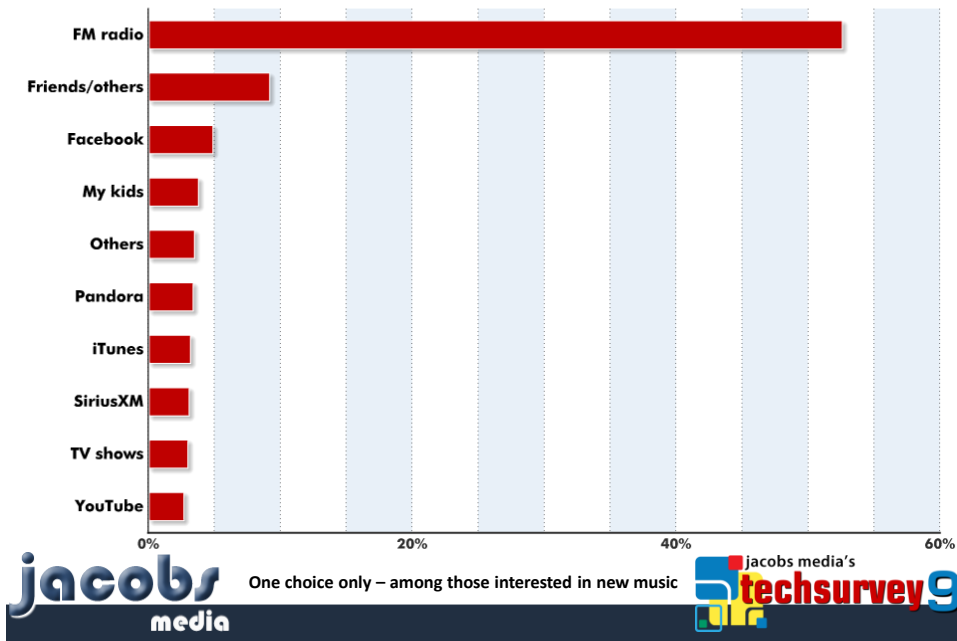
Most Important New Car Features



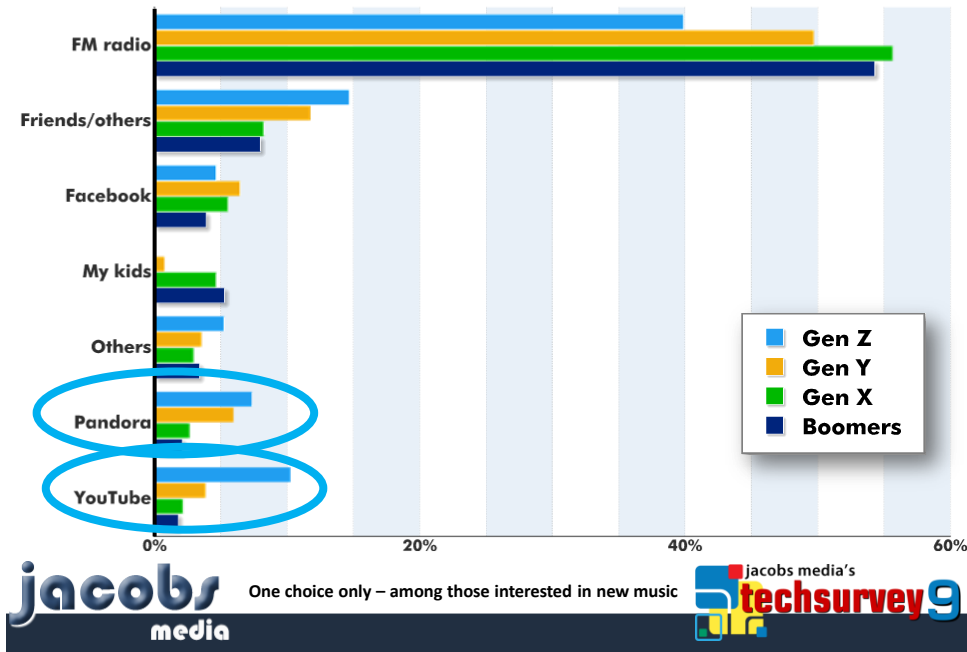
Pandora's Major Drawbacks



New Music & New Artist Discovery



New Music & New Artist Discovery



ANA's ad outlook better for radio than most traditional media. The media buffet for ad buyers keeps getting longer, but radio appears to be holding onto most of its advertisers. A just-released survey from the Association of National Advertisers finds eight-in-ten of its members are either increasing their broadcast radio spending or holding budgets flat. Radio's consumption is holding its own against other media choices that are popping up every day, and advertisers seem to be taking note. The survey finds 64% of advertisers are holding radio budgets flat in 2013. Some are putting more dollars into radio — 10% said they're bumping up their radio spending more than 5%. And another 5% said they're increasing their radio budgets by low-single digits. The ANA survey sample isn't as large as some other research — it was fielded among

a subset of members who have direct oversight of media negotiations. But it provides insight into what some of the biggest marketers are thinking. The media segment seeing the biggest growth is online video with increases planned by nine-in-ten survey respondents. Mobile is second, with eight-in-ten planning to put more of their budget there. But with video pre-roll and smartphone ads on radio website and apps, that gives stations a way to capture some of those growing digital budgets. Radio still needs to convince some advertisers to stick with it. The ANA survey found 20% plan to cut their radio budgets this year, half by 5% or more. Yet it's holding up better than other traditional media. The biggest shifts were away from network TV, syndicated TV and print. Local spot TV trends were similar to the radio results. Perhaps the best news for radio and every other media is a majority of those who took the survey said their overall media budgets are larger this year

JACOBS: "DIGITAL DASHBOARD USAGE GROWING"

5-6-13

Jacobs Media has released its annual Techsurvey. It's the 9th survey of its kind conducted by Jacobs Media and Fred Jacobs says, "Techsurvey9 shows that while gadgets and new media continue to occupy the headlines, radio's ability to uniquely connect with consumers on their preferred platforms is the secret sauce for future success in the digital space." The survey also revealed that the digital dashboard, like Ford's Sync, is gaining popularity with users.

Here are some highlights from Techsurvey9

- **Protecting The In-Car Listening Franchise:** More than half of all respondents say that most of their radio listening takes place in cars. And now, more than one in 10 (11 percent) drives a vehicle equipped with a "digital dash" system like Ford's Sync, especially fans of Country, News/Talk and Sports radio.

- **Radio is making the transition to digital:** Consumers are now accessing station content on digital channels. When asked to recall their last week's listening to the station that sent them our survey, 14 percent of all respondents say they tuned in on computer and mobile streams, as well as other digital sources. The younger the generation, the more reliance there is on digital platforms to enjoy broadcast radio.

- **AM/FM Radio still matters:** The "emotional triggers" from 2012's Techsurvey8 study are intact: listening to radio at work, mood enhancement, escape, and companionship. And consumers continue to demand radio in their new cars, as well as rely on broadcast radio for new music and new artist discovery.

- **Pandora is a big player:** By far, Pandora continues to be the most popular pure-play Internet option, outstripping its competitors. While Pandora is a force to be reckoned with on the mobile front, its main drawback is now its commercials, cited by a growing number of its listeners. And even Pandora users continue to be significant consumers of broadcast radio.

- **It's about mobile – and mobility:** The three big stars of Techsurvey9 are smartphones, tablets, and the "digital dashboard." Each shows a significant increase in acquisition, indicating that consumers are continuing to take their favorite content with them wherever they go.

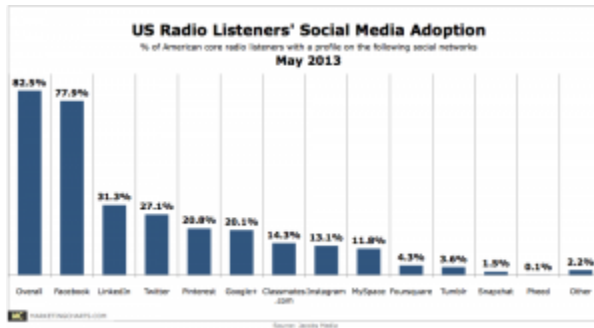
Techsurvey9 results were gathered online from January 29-February 19, 2013. Overall, 264 broadcast stations across the U.S. and Canada participated, contributing 78,111 respondents. A series of format

webinars has been scheduled. There is more information at www.jacobsmedia.com/techsurvey9/formatwebinars.asp with dates and registration.

Despite new competition, most listeners show staunch loyalty to radio. New listening data compiled by Katz Media Group from USA Touchpoints makes a convincing case for radio as the only audio medium to effectively reach a majority of Americans. On a daily basis, AM/FM radio (including its station streams) reaches 57% of adults 18-64, the data shows. Within that group, 86% say they listened exclusively to AM/FM or its station streams. Just 14% also listened to satellite radio or streaming music services like Pandora, Rdio, Slacker and Spotify. The percent of daily radio listeners who tune exclusively to AM/FM radio and its online streams remain largely consistent across demos, although radio's daily reach is lower among younger demos. For example, radio's daily reach is 51% among 18-34s compared to 58% for 55-64s. Panelists in USA Touchpoints cross-platform measurement service receive a smartphone containing an app, which they use to fill out an eDiary in 30-minute increments over a 10-day period

Radio's Audience is Highly Social

May 6, 2013 by MarketingCharts staff



83% of radio listeners in the US have a profile on a social networking site, [according to](#) results from Jacob Media's Techsurvey 9, which surveyed more than 78,000 listeners across the US and Canada. While social networking use is (unsurprisingly) highest among radio listeners aged 18-34 (91.1% in the US and Canada combined), it's also quite high among the 55+ crowd (73.5%). By comparison, a recent Pew survey found that [67% of US internet users have a social networking profile](#), a figure that drops to 52% among 50-64-year-olds, and just 32% among the 65 and older set. What's more, American radio listeners seem keen to look beyond just Facebook: 29% use Twitter; 21% use Pinterest; and 20% use Google+.

The study turns up some somewhat predictable results when sorting by gender: among radio listeners in the US and Canada, women are more likely than men to be using Facebook (82.3% vs. 71.4%), Pinterest (29.9% vs. 6%) and Instagram (15.9% vs. 8.7%), but less likely to be on LinkedIn (29.1% vs. 34.2%). There's more parity in use of Google+, Twitter, and Foursquare.

Radio stations are doing a good job of using these social platforms to connect with listeners. Almost two-thirds of the survey's American Facebook users said they have liked the station that sent them the survey, and slightly more than half said they visit the Facebook page of the station that sent the survey at least weekly.

Among American Twitter users, about 3 in 10 follow the station that sent them the survey, or any of its personalities or DJs.

Those connections tend to foster deeper relationships, too. Among US respondents who had connected with the station that sent the survey through Facebook, 60% said being the station's Facebook fan or friend enabled them to have a stronger relationship with the station. Close to half of those who follow the station (or its personalities) on Twitter said the same.

About the Data: Techsurvey9 results were gathered online from January 29-February 19, 2013. Overall, 264 broadcast stations across the U.S. and Canada participated, contributing 78,111 respondents.

Study finds newspaper readers are engaged, but local papers need to do more on mobile

By [Laura Hazard Owen](#)

16 hours ago Apr. 16, 2013 - 2:45 PM EDT

A new survey from the Newspaper Association of America and Nielsen finds that newspaper readers are highly engaged. But they have to do more on mobile, particularly as ad revenue plunges.

Newspapers are still better at engaging audiences than any other form of media, according to a new Newspaper Association of America (NAA) survey conducted by Nielsen, and print newspaper advertising remains effective. With newspaper ad revenue plunging, though, the picture isn't as rosy as this survey makes it appear — and newspapers can do more, especially when it comes to social networking and mobile.

The NAA-Nielsen study surveyed 5,000 adults on “11 different metrics for engagement, including trust and ethics, how connected media makes people feel, the value or inspiration it adds to life, and the effectiveness of advertising.” On that measure, print and online newspapers came out on top:

Aggregate Engagement Scores

Newspapers Print/Web	43%
TV/TV Web	37%
Radio	41%
Internet	41%
Total	40%

Percent rating 7 - 10 on a 10 point scale

Advertising in print newspapers and on their websites is also effective. The survey asked respondents about different metrics of advertising effectiveness, like “usually notice ads,” “likely to purchase” and “best place for Black Friday shopping.” The average score across all media was 35 percent, with newspapers a bit higher:

Aggregate Advertising Scores

Print Newspapers	41%
Newspapers Print/Web	39%
Radio	34%
Internet	33%
TV/TV Web	32%
Total	35%

Percent rating 7 - 10 on a 10 point scale

Unprecedented National Research on "State of Listening in America" Shows Radio Remains Hugely Popular across Multiple Platforms

Several Key Groups - Including Millennials and Generation Z - Remain Especially Attached to Radio, Finding it "Trustworthy," "Human" and "Relate-able"

Digital Media Fuels Category Growth for Radio

Listeners Also Connect to their Favorite Stations and DJs Via Social Media, and are Especially Receptive to "Close To Point of Purchase" Radio Advertising

NEW YORK--([BUSINESS WIRE](#))-- Clear Channel Media and Entertainment (CCM+E) today unveiled the results of an extensive study of the *State of Listening in America*, which underscore radio's continued, widespread popularity, particularly among Millennials and Generation Z, who listen to radio regularly and describe it as "trustworthy," "human" and "relate-able." The study is the first comprehensive audio analysis that addresses the various ways people are listening today and also clearly demonstrates that the growing prevalence of mobile devices coupled with easy access to streaming apps have made radio more relevant to users.

The comprehensive research, conducted for CCM+E by **research firms Latitude Research and OpenMind Strategy**, also reveals that listeners enjoy connecting with their favorite stations and on-air personalities via social media, illustrating how social media has made radio increasingly interactive and personal.

The study shows that 92 percent of Americans regularly tune in to AM/FM radio and that much of this listening happens at or near a place of purchase - radio's significant and "unique selling proposition," in the words of advertising icon David Ogilvy. Additionally, 85 percent of listeners feel radio is more accessible than ever, which demonstrates that digital media, most notably iHeartRadio, has fueled category growth and expanded radio's accessibility and relevancy.

Also a majority of listeners view on-air personalities as local celebrities and reported that DJs engage listeners regularly on both digital and broadcast platforms. "It's gone from calling in [to the station], to texting, to Twitter," said one participant. "It keeps getting easier" [to be part of the radio station's community].

Listeners also revealed that they prefer on-air advertising that is creative, humorous, leverages on-air talent and is generally "more like radio."

"This research confirms that radio's reach and appeal remain strong regardless of the platform, geography, ethnicity, or age group," said Clear Channel CEO Bob Pittman. "American listeners - particularly younger generations - feel a strong connection to their favorite on-air radio personalities - which is made stronger by social media - in a way that isn't replicated by other media."

The following are among the study's key findings:

- 92 percent of all respondents listen to radio at least once a week.
- 69 percent agree "streaming services do not replace radio."
- 80 percent say radio is helpful in discovering new artists or songs.
- 82 percent say the first thing they do when they get in a car is turn on the radio.
- 66 percent agree that their favorite radio stations reflect who they are as a person.

- 78 percent agree that radio has the power to make a difference in the community and 72 percent believe radio is more community-oriented than TV.
- 85 percent say radio is more accessible than at any time before and 78 percent say they can access radio anywhere.
- Radio advertising is viewed more positively than ads on TV, internet and mobile apps.
- 72 percent believe that radio feels more "human" than the internet and 65 percent believe it is more "personal" than TV.
- 71 percent say radio is a part of their daily routine.

"This is the first time the industry has looked so closely at the state of audio in America today," said Dr. Radha Subramanyam, EVP, Insights, Research and Analytics at CCM+E. "The study represents a major step forward in understanding how hundreds of millions of Americans engage with radio and audio content and advertising every day."

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May 10, 2013 05:00 AM Eastern Daylight Time

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“This research confirms that radio’s reach and appeal remain strong regardless of the platform, geography, ethnicity, or age group”

The comprehensive research, conducted for CCM+E by research firms Latitude Research and OpenMind Strategy, also reveals that listeners enjoy connecting with their favorite stations and on-air personalities via social media, illustrating how social media has made radio increasingly interactive and personal.

The study shows that 92 percent of Americans regularly tune in to AM/FM radio and that much of this listening happens at or near a place of purchase – radio’s significant and “unique selling proposition,” in the words of advertising icon David Ogilvy. Additionally, 85 percent of listeners feel radio is more accessible than ever, which demonstrates that digital media, most notably iHeartRadio, has fueled category growth and expanded radio’s accessibility and relevancy.

Also a majority of listeners view on-air personalities as local celebrities and reported that DJs engage listeners regularly on both digital and broadcast platforms. “It’s gone from calling in [to the station], to texting, to Twitter,” said one participant. “It keeps getting easier” [to be part of the radio station’s community].

Listeners also revealed that they prefer on-air advertising that is creative, humorous, leverages on-air talent and is generally “more like radio.”

“This research confirms that radio’s reach and appeal remain strong regardless of the platform, geography, ethnicity, or age group,” said Clear Channel CEO Bob Pittman. “American listeners – particularly younger generations – feel a strong connection to their favorite on-air radio personalities – which is made stronger by social media – in a way that isn’t replicated by other media.”

The following are among the study's key findings:

- 92 percent of all respondents listen to radio at least once a week.
- 69 percent agree "streaming services do not replace radio."
- 80 percent say radio is helpful in discovering new artists or songs.
- 82 percent say the first thing they do when they get in a car is turn on the radio.
- 66 percent agree that their favorite radio stations reflect who they are as a person.
- 78 percent agree that radio has the power to make a difference in the community and 72 percent believe radio is more community-oriented than TV.
- 85 percent say radio is more accessible than at any time before and 78 percent say they can access radio anywhere.
- Radio advertising is viewed more positively than ads on TV, internet and mobile apps.
- 72 percent believe that radio feels more "human" than the internet and 65 percent believe it is more "personal" than TV.
- 71 percent say radio is a part of their daily routine.

"This is the first time the industry has looked so closely at the state of audio in America today," said Dr. Radha Subramanyam, EVP, Insights, Research and Analytics at CCM+E. "The study represents a major step forward in understanding how hundreds of millions of Americans engage with radio and audio content and advertising every day."

The results were presented by Dr. Subramanyam, who holds a PhD in Radio, Television and Film, to an audience of major advertisers and included a performance by Rod Stewart at the iHeartRadio Theater presented by PC Richard and Son. CCM+E partnered with Latitude Research and OpenMind to survey more than one thousand respondents. The report also includes insights gleaned

from live focus groups, ethnographies and journals from Americans across the country.

Nielsen: Radio scores high in audience engagement, average in advertising efficacy. The claim that listeners are highly engaged with radio is reinforced loud and clear in a new cross-media engagement study conducted by Nielsen. Radio tied for second across an aggregate of 11 different metrics of engagement in the study, commissioned by the Newspaper Association Of America. Newspapers came in first. Local news radio was tied for second in trustworthiness, with 56% attributing that quality to it. Local talk radio was right behind at 55%. Racking up similar percentages, local news radio and local talk radio were also tied for second and third, respectively, when people were asked which source operated “in an ethical manner and [has] the public’s best interest in mind.” Radio grabbed half of the top six positions when respondents were asked which media “inspire me.” Local talk radio came in fourth among 13 different media in the inspiration metric, followed by local news radio and local music radio. With 45% saying it “makes my life better,” local music radio ranked second followed by local talk radio (44%). But radio scored about average in the efficacy of its advertising. On a scale of different metrics of advertising effectiveness – including “usually notice ads” and “likely to purchase” – radio scored an average 34% among U.S. adult consumers. That’s in line with the 35% average score for all media. Radio also indexed at the norm of 100 in how engaged audiences were with its advertising. When it comes to whether audiences notice advertising and whether it makes them more likely to purchase, local talk and news radio fared better than local music radio. But music radio beat news and talk radio in a more dubious attribute: advertising annoyance, where it ranked third only to social networks and Twitter/blogs. The online survey of 5,000 adults was fielded from December 9, 2012-January 8, 2013.

Qq GNC bulks up on radio ads. GNC’s diet for good marketing this summer is a healthy dose of radio. The national sports fitness retailer will launch a new marketing campaign to educate consumers about a new member pricing program. The “Respect Yourself” campaign is the company’s biggest advertising push in several years. “We’re investing in radio, we’re investing in digital, we’re investing in additional direct mail — it will be a pretty comprehensive approach to launching this program,” CEO Joe Fortunato said. He told analysts last week that GNC will use a “much more extensive” direct marketing program in 2013 to focus on the benefits of their new pricing program in order to “rejuvenate” some Gold Card customers who haven’t shopped in GNC stores for a while. “We’re doing radio across the country for three weeks starting May 6 — then off a week — and then back on for a week in June,” he said. **GNC is committed to radio because it showed results while testing the new pricing strategy in Kansas City and other markets over the past two years.** GNC will add about \$3 million to the 2013 marketing budget to support the launch. It will mark a return of sorts to radio for GNC which spent \$876,000 on radio in 2011 but slashed that spending to just \$64,000 in 2012 according to Kantar Media. While radio’s known for its ability to impact business quickly, Fortunato doesn’t expect radio to have an overnight impact on GNC’s sales volume since their customers tend not to come into a store every month. “When you get all this marketing out there and the radio’s hitting, it’s going to take somewhere from around 8 weeks-plus to get the consumer’s reaction and start coming into the stores,” he predicted

NEW COMPREHENSIVE RESEARCH CONFIRMS POWER OF RADIO

For what seems like years now, radio executives have been saying "*We need to tell a better story.*" It was almost as if everyone wanted more information about the power of radio but nobody was willing to go out and produce that information. Until now. Clear Channel says it partnered with Latitude Research and OpenMind Strategy on comprehensive research that concludes radio remains very popular across multiple platforms. And the research says several key groups – including millennials and generation Z – remain especially attached to radio, finding it “trustworthy,” “human,” and “relate-able”

The study, called "The State of Listening in America," is also in line with what Arbitron has been saying for several years. According to the research, 92 percent of Americans regularly tune in to AM/FM radio and much of this listening happens at or near a place of purchase – radio’s significant and “unique selling proposition.” Additionally, 85 percent of listeners feel radio is more accessible than ever, which demonstrates that digital media has fueled category growth and expanded radio’s accessibility and relevancy.

The study also says listeners enjoy connecting with their favorite stations and on-air personalities via social media. And a majority of listeners view on-air personalities as local celebrities and reported that DJs engage listeners regularly on both digital and broadcast platforms. “It’s gone from calling in [to the station], to texting, to Twitter,” said one participant. “It keeps getting easier” [to be part of the radio station’s community].

Clear Channel CEO Bob Pittman said, “This research confirms that radio’s reach and appeal remain strong regardless of the platform, geography, ethnicity, or age group. American listeners – particularly younger generations – feel a strong connection to their favorite on-air radio personalities – which is made stronger by social media – in a way that isn’t replicated by other media.” Listeners also revealed that they prefer on-air advertising that is creative, humorous, leverages on-air talent and is generally 'more like radio.'”

Clear Channel partnered with Latitude Research and OpenMind to survey more than one thousand respondents.

The report also includes insights gleaned from live focus groups, ethnographies, and journals from Americans across the country. Here are some of the highlights from the study:

- 92 percent of all respondents listen to radio at least once a week.
- 69 percent agree “streaming services do not replace radio.”
- 80 percent say radio is helpful in discovering new artists or songs.
- 82 percent say the first thing they do when they get in a car is turn on the radio.
- 66 percent agree that their favorite radio stations reflect who they are as a person.
- 78 percent agree that radio has the power to make a difference in the community and 72 percent believe radio is more community-oriented than TV.
- 85 percent say radio is more accessible than at any time before and 78 percent say they can access radio

anywhere.

- Radio advertising is viewed more positively than ads on TV, Internet, and mobile apps.
- 72 percent believe that radio feels more “human” than the Internet and 65 percent believe it is more “personal” than TV.
- 71 percent say radio is a part of their daily routine.

Radio’s cluttered? Not compared to the web. Feeling a bit overwhelmed by online ads? Here’s why. The U.S. online advertising market delivered nearly 1.1 trillion display ads during the first quarter, according to comScore. Nearly one-third, or about 346 billion, came on Facebook — which saw its ad impressions double over the previous year. “We are now seeing more than one trillion display ads delivered every single quarter and nearly 300 individual advertisers spending at least \$1 million a quarter on display,” comScore EVP Jeff Hackett says.

- **3/31/06**Listeners paying close attention to live traffic reports, sponsors
*****A recent study conducted by Edison Media Research found that almost three-quarters (75%) of radio traffic listeners pay more attention to commercials read live by the announcer of a traffic or news report than they do to pre-recorded commercials. The Edison Metro Traffic Study also concluded that 78% of those commuters requiring traffic information for suburban roadways gained this traffic information from their regular local traffic stations. Additionally, the study found that traffic reports demonstrated an ability to pull people away from CD players, MP3 players and Satellite Radio. One in four respondents indicated that they listened to something other than radio in their cars, but then switched back to AM/FM radio specifically to hear traffic reports. Those with exceptionally long commutes (greater than 60 minutes each way) reported an even greater propensity to switch to AM/FM radio for traffic reports, as nearly half of those listeners indicated they listen to CDs or MP3s, but switch to hear traffic. More than 90% of radio traffic listeners pay close attention to traffic reports. "Clearly, traffic reports are extremely 'sticky' content for radio listeners,"

noted Tom Webster, VP/Edison Media Research. "Listeners know where to find localized traffic reports, especially in suburban areas, and rely on them to help them navigate their increasingly longer commutes

No medium is inherently engaging or not. Engagement differs across the same medium based upon the way it is being deployed

While working in the media industry, I have often heard statements like "the Internet is more engaging than traditional media". Our study suggests that such generalizations are far too simplistic. If engagement varies significantly by vehicle within a medium, then to be fully understood, engagement must be evaluated at the vehicle, rather than the medium, level. It's not strictly correct to speak of engagement with the Internet;

For a low price, Dollar Shave Club will send you new razors right to your home. So, it's about making the lives of guys easier, alleviating the need to show for blades.

But here's the kicker. As I was reading through the interview, Dubin was asked about the media he's used to get the word out about Dollar Shave Club.

And his response?

Radio.

Yes, you read that right – this new startup has been marketed with radio ads – not national TV spots, Pandora :10s, or web banner ads.

To learn more about the media plan, I contacted Dollar Shave Club and asked Michael to be more specific about his media plan, and of course the big question:

FJ: Why radio?

MD: Impactful creative. Dollar Shave Club has a strong, recognizable brand voice and a simple, straightforward message that we felt could resonate to a radio audience. Whether it was coming directly from the brand or an endorsement, we think it will break through the clutter and help us to acquire new customers. Radio also enables creative flexibility and relatively low production costs, which allowed us to test and learn how the audience was responding. (And) targeting. (Radio) enabled us to find a lot of our guys at once that are engaging with content where we felt our message would have high receptivity – sports and humor. It also was scalable at both a national and local level, which enabled us to test and target specific cities, demographics and content arenas quickly.

FJ: How much of your buys are endorsements from personalities, and can you talk about why this was an avenue you pursued as opposed to recorded spots?

MD: We can't disclose the percentages between endorsements vs. recorded spots, but we've actually found success in both routes. Endorsements gives us a familiar voice the audience trusts, and also puts our message in or surrounding the content – which is when engagement is at its highest. It delivers a large volume of highly qualified consumers to our site. Recorded spots directly deliver the brand's voice, which allows us to tell brand stories and weave messaging in over time. With lower costs than endorsements, it also enables us to deliver stronger frequency.

Smart radio operators have long known about the power of local personalities to pitch products. Here in Detroit, WRIF's Meltdown was one of the DJs who has done live reads for Dollar Shave Club. I'm sure many of you have heard these endorsements and recorded spots around the country.

And when asked about the bottom line – did it work and why – Michaels told me, "Yes, we're acquiring new customers profitably." In this case,

men. As he points out, one of radio's great qualities is its ability to target key customer groups – something that Dollar Shave Club has obviously taken advantage of in its foray into media advertising.

Michael also noted that “radio will continue to be in our future plans,” as long as it continues to attract new business in an efficient way.

zzChesney's Life On A Rock will be Available On-Demand for Fans via Clear Channel Websites

Clear Channel Media and Entertainment and Blue Chair

Records/Columbia Nashville announced today an integrated promotional and marketing partnership to preview Kenny Chesney's new Life On A Rock album, set to release April 30. Clear Channel will host an exclusive iHeartRadio Album Release Party – featuring a never-been-done-before one hour live conversation and listening session with Chesney in the iHeartRadio Theater in New York City on April 29 at 1 p.m. EST.

The conversation and album preview is part of Clear Channel's multi-platform campaign, which will include an on-air and online Artist Integration Program, designed to introduce what the critics have called "Chesney's most personal music" to fans and listeners nationwide.

Kenny Chesney has sold over a million tickets to each of his past 10 tours, won the Country Music Association and Academy of Country Music's Entertainer of the Year Award a combined eight times, had 24 No. 1 hits and sold more than 30 million albums. The people, places, moments and feelings of a driven man at rest inspired his upcoming Life On A Rock, which celebrates life, the rhythms of being alive, the joy of friendship, the beauty of the world and the pleasures of slowing down.

To harness the excitement around Life on a Rock, Clear Channel will host this exclusive iHeartRadio Album Release Party at the iHeartRadio Theater presented by P.C. Richard & Son in New York City on Monday, April 29 at 1 p.m. EST. Bobby Bones, host of The Bobby Bones Show, syndicated on Country radio stations nationwide, will join Chesney for one unbelievable hour of songs, fun, tales from the road and stories of where the music came from. Featuring a live, on-stage interview, Chesney will

bring the fans inside a project he says, "I never knew I was making, and songs I wrote just for me..."

The event will broadcast live across more than 100 Clear Channel Country radio stations as well as station websites and iHeartRadio.com, Clear Channel's industry-leading digital music service. The Album Release Party and its live stream will be promoted on-air extensively across Clear Channel Country radio stations' nationwide and across its digital platforms, including iHeartRadio beginning Thursday, April 25.

Following the Kenny Chesney iHeartRadio Album Release Party, Clear Channel will begin its immersive two-week Artist Integration Program, leveraging its powerful on-air and online platforms. The program allows fans and listeners the opportunity to fully experience Life On A Rock, through exclusive content, audio clips, on-demand video from the release party, in addition to hearing the complete album on-demand via Clear Channel's Country stations websites.

This unique promotional campaign will increase audience engagement and awareness of Chesney's newest album via custom created content and spots that will run across all Clear Channel Country radio stations and websites nationwide – including featured placement on iHeartRadio.com. Listeners will also be able to click and listen to exclusive content through the platform's various portals, which will allow fans to easily purchase "Life on a Rock" via iTunes.

"I'm happy the folks at Clear Channel are giving me an opportunity to talk to the fans about this really personal record," Chesney said. "When you take a risk and do something outside the box, make an album that pulls back some layers and expectations, you want the fans to share in where the music came from, just as much as you want people to see their lives in your song... This lets me bring them the man I am when I'm not onstage."

"We're excited to play a key role in the album launch for one of Country music's biggest artists, Kenny Chesney," said Tom Poleman, President of National Programming Platforms, Clear Channel Media and Entertainment. "The marriage of Kenny's music and our unmatched country platform, including the largest number of country radio stations and iHeartRadio, allows Clear Channel to bring music to consumers like no one else."

Qq The Whole Story - The Diet Pepsi Media Challenge

by Mike Bloxham, Yesterday, 8:47 AM

The carbonated drinks category is a fiercely fought sector in which consumer habit and loyalty is a key driver of success. The category is so large that even when it is broken down by brand and sub-brand – of which there are many – loyalists for any sub-brand still number in the millions. Understanding their daily media habits is critical in understanding how best to shape communications strategies.

This analysis leverages the fact that USA TouchPoints data is linked back to the MRI Codebook to enable analyses at the level of brand and category purchasers and consumers. It looks at the relative daily reach of different media among 18-64 year-old Diet Pepsi loyalists —those who drink diet cola and who always choose Diet Pepsi.

The medium that achieves the greatest average daily reach is Live TV at 75%, but the very respectable second place is taken by Radio at 57% — possibly because other analysis has revealed this group to be on the move a good deal of the day and as we know, radio dominates the world of in-car media.

While the Internet via the Computer comes in fourth place at 42% (lots of workplace consumption no doubt), it is sandwiched between two media often overlooked in the world of Big Media: Mobile Texting (48%) and Email via the Computer. Though neither are regulars on the media plan, their daily reach among Diet Pepsi loyalists – and probably other consumers of carbonated drinks – is too high to responsibly ignore. Even though much of the email use will be work-related, there is ample evidence to suggest the mediums potential for consumer engagement.

Important- compare radio versus other mediums combined

Interestingly Texting delivers a full 20% more reach than the combination of Mobile Apps and Web – which may come as something of a surprise to many in the media industries who are more enamored and heavier users of

apps and Web browsing on our phones. But that's not so forr the general population of Diet Pepsi loyalists.

Something similar may also be said for the reach delivered by the Tablet. While this can reasonably be expected to grow, at a mere 10% right now, it is unlikely to justify anything more than experimental activity.

Such an analysis could also be done in comparison to the sector as a whole or against specific competing brands and also to show how media use varies through the day and week. But as a simple check against which media are most likely to deliver brand loyalists on an average day, even this analysis shows up some potentially enlightening opportunities for developing differentiated channel planning strategies.

2013 Nielsen National Cross-Media Engagement Study

Introduction

This report studies the increasingly important question of audience engagement and in so doing moves beyond more traditional metrics of overall audience or demographics. The survey compares the nature of audience engagement with different major media on several key metrics, including comparing the ability to engage consumers with advertising, the level of trust people put in different media and whether people find the content they encounter makes their life better. The side-by-side ad scoring, among other things, can help different media see where there opportunities for more engagement. The findings can also aid advertisers and agencies assess which media help consumers seek and respond to advertising.

The findings show that entertainment platforms engage consumers frequently, but news, particularly from newspaper media, are viewed as more trustworthy and have distinct advantages in the efficacy of the advertising they provide. The findings also show how much growth potential exist for different media in extending their reach and engagement through mobile.

This online survey of 5,000 adults conducted by Nielsen and underwritten by the Newspaper Association of America, was fielded from December 9, 2012 through January 8, 2013 and the margin of error is 1.4%.

Of all media, local television, including entertainment programming, continues to have the highest overall audience. In all, 9 out of 10 adults watch content carried over traditional network affiliated local broadcast stations every week (ABC, NBC, CBS and Fox). Eight in ten Americans (82%) also listen to the radio each week. Almost as many, 78%, consume content from local and national newspapers in print or online. Similarly, 80% say they watch cable TV content of some kind each week and 73% say they spend time with social media such as Facebook.

Weekly Consumption All Sources

Net: All Local TV	90%
Net: All Local Radio	82%
Net: All Newspapers Print/Online	78%
Cable TV	81%
Local NBC TV	77%
Local ABC TV	77%
Local CBS TV	76%
Social network	73%
Local FOX TV	73%
Local music radio	73%
Local newspaper	66%
National news website	60%
Local TV news website	52%
Local news radio	52%
Local newspaper website	48%
Local talk radio	44%
Twitter/Blogs	32%

But how they engage with that media looks quite different. Overall, on eleven different metrics of engagement—including trust and ethics, how connected it makes people feel, the value or inspiration it adds to life and the effectiveness of the advertising—newspaper media scored highest.¹

Aggregate Engagement Scores

Newspapers Print/Web	43%
TV/TV Web	37%
Radio	41%
Internet	41%
Total	40%

Percent rating 7 - 10 on a 10 point scale

When asked whether different media “are trustworthy,” for instance, 56% attributed that quality to newspapers (print and online). National print newspapers ranked first (58%), followed by local print newspapers and national newspaper websites and local radio news (56%).

Media Rating: Trustworthy

National newspaper	58%
National newspaper website	56%
Local newspaper	56%
Local news radio	56%
Local newspaper website	55%
Local talk radio	55%
National news website	54%
Local TV news website	53%
Local CBS TV	52%
Local ABC TV	52%
Local music radio	52%
Local FOX TV	51%
Cable TV	51%
Local NBC TV	51%
Twitter/Blogs	46%
Social network	37%

Percent rating 7 - 10 on a 10 point scale

¹ The average engagement is calculated by averaging all the engagement measures (7-10 on a 10 point scale) for all weekly readers/viewers/users of the given property.

National print newspapers ranked highest among all media (at 54%) when people were asked which source operated “in an ethical manner and have the public’s best interest in mind.” They were followed by local radio and local newspapers (53%).

Media Rating: Ethical/Public Interest

National newspaper	54%
Local newspaper	53%
Local news radio	53%
National newspaper website	52%
Local talk radio	52%
National news website	52%
Local newspaper website	51%
Local music radio	51%
Local ABC TV	50%
Local TV news website	49%
Local CBS TV	49%
Local NBC TV	49%
Local FOX TV	48%
Cable TV	48%
Twitter/Blogs	44%
Social network	39%

Percent rating 7 - 10 on a 10 point scale

Media Rating: Inspires Me

National newspaper	42%
Twitter/Blogs	41%
National newspaper website	39%
Local talk radio	39%
Local news radio	36%
Local music radio	35%
Social network	34%
Local newspaper	33%
Local newspaper website	33%
Cable TV	33%
National news website	32%
Local TV news website	32%
Local TV (avg.)	29%

Percent rating 7 - 10 on a 10 point scale

Media Rating: Makes Life Better

National newspaper	46%
Local music radio	45%
Local talk radio	44%
Twitter/Blogs	44%
Social network	43%
Local newspaper	42%
National newspaper website	42%
National news website	42%
Local news radio	41%
Cable TV	41%
Local newspaper website	38%
Local TV news website	38%
Local TV (avg.)	36%

Percent rating 7 - 10 on a 10 point scale

Aggregate Advertising Scores

Print Newspapers	41%
Newspapers Print/Web	39%
Radio	34%
Internet	33%
TV/TV Web	32%
Total	35%

Percent rating 7 - 10 on a 10 point scale

Average Ad Engagement Index

Newspaper Generated Content	112
Local newspaper	119
National newspaper	117
Newspaper websites	106
Social Media	100
Microblogging website (e.g. Twitter)	110
A social network website (e.g., Facebook, Google+, Foursquare)	89
Other Media	95
Radio	100
Local TV news websites	96
Cable TV	94
Local TV news websites	93
National news website	89

These relationships remain in place when media are aggregated by the source of content across platform (i.e. TV stations and their websites).

Average Ad Engagement Index

Newspapers and newspaper websites	112
Radio and their webcasts	100
Social Media	96
Television and their websites	94

Media Rating: Usually Noticed Advertising

Local newspaper	48%
National newspaper	46%
National newspaper website	43%
Local talk radio	42%
Twitter/Blogs	42%
Local news radio	41%
Local newspaper website	40%
Cable TV	39%
Local TV (avg.)	39%
Local music radio	38%
Local TV news website	38%
Social network	37%
National news website	36%

Percent rating 7 - 10 on a 10 point scale

One critical question, particularly in a crowded media market place, is whether advertising makes consumers more likely to purchase. On this metric, 35 said yes to local newspapers and national papers, as well as blogs. Next came the websites of both newspaper types (33% national and 32% local) followed by local talk radio.

Media Rating: Likely to Purchase

Local newspaper	35%
National newspaper	35%
Twitter/Blogs	35%
National newspaper website	33%
Local talk radio	32%
Local newspaper website	32%
Local news radio	29%
Local TV news website	28%
Cable TV	26%
Local TV (avg.)	26%
National news website	26%
Local music radio	25%
Social network	25%

Percent rating 7 - 10 on a 10 point scale

Media Rating: Advertising Annoyance

Social network	46%
Twitter/Blogs	45%
Local music radio	41%
Cable TV	40%
Local news/talk radio	39%
Local TV news website	39%
Local TV (avg.)	39%
National news website	39%
National newspaper	38%
National newspaper website	38%
Local newspaper website	37%
Local newspaper	31%

Percent rating 7 - 10 on a 10 point scale

Media Rating: Black Friday Shopping

Local newspaper	63%
Local newspaper website	47%
Twitter/Blogs	46%
National newspaper	43%
Local news/talk radio	43%
National newspaper website	41%
Local TV news website	41%
Local TV (avg.)	39%
Social network	39%
Local music radio	35%
National news website	32%
Cable TV	30%

Percent rating 7 - 10 on a 10 point scale

Media Rating: Personal Connection

Social network	44%
Twitter/Blogs	41%
National newspaper	36%
Local talk radio	36%
Local newspaper	35%
Local newspaper website	35%
National newspaper website	33%
Local music radio	33%
Local news radio	32%
Local TV news website	30%
Cable TV	29%
National news website	28%
Local TV (avg.)	27%

Percent rating 7 - 10 on a 10 point scale

When asked whether a particular media “enhanced my interaction with others,” social networks such as Facebook ranked first (57%), microblogs such as Twitter 54%, national newspapers ranked third (41%), followed by their websites (40%), local talk radio (40%), local newspaper websites (36%) and local newspapers in print (35%).

Media Rating: Enhance Interaction

Social network	57%
Twitter/Blogs	54%
National newspaper	41%
Local talk radio	40%
National newspaper website	40%
National news website	40%
Local newspaper website	36%
Local newspaper	35%
Local news radio	35%
Local TV news website	33%
Cable TV	32%
Local music radio	31%
Local TV (avg.)	29%

Percent rating 7 - 10 on a 10 point scale

Social media also scored highly when people asked where they go when they have “time to myself.” Some 58% said social networking sites (Facebook), 54% cable TV, and microblogs (Twitter 53%). Next are local music radio stations (49%) and newspapers (national print 48% and local print 47%). Here the websites of national newspapers fared somewhat better (46%) than the websites of local newspapers (43%).

Media Rating: Time to Myself

Social network	58%
Cable TV	54%
Twitter/Blogs	53%
Local music radio	49%
National newspaper	48%
Local newspaper	47%
National newspaper website	46%
Local news/talk radio	45%
National news website	43%
Local newspaper website	43%
Local TV (avg.)	42%
Local TV news website	41%

Percent rating 7 - 10 on a 10 point scale

Notes on Methodology

The findings come from an online survey of 5,000 adults conducted by Nielsen and sponsored by the Newspaper Association of America.

This survey utilized an electronic methodology with online panel respondents. The survey was fielded from December 9, 2012 through January 8, 2013. The margin of error is 1.4%.

Content within this data set may overlap in certain instances with other data sources and surveys both custom and syndicated. Individual numbers may not match other sources due to differences in one or more of the following:

- Sample base
- Method(s) of recruitment (phone, online, in-person, mail, etc.)
- Wording of the question
- Periodicity (daily, monthly, quarterly, semi-annual, annual)
- Individual vs. Household base

Radio beats all other media in ‘the moment of truth’ before purchase decisions are made. Ads are believed to be most effective when they air immediately prior to the time a consumer

makes a buying decision, like a fast food spot delivered just before lunchtime. Radio scores higher in this metric, known as recency, than any other media according to new data from Arbitron and Edison Research. AM/FM radio delivers far more consumers (49%) than any other media during the half hour before they arrive to shop, more than twice the number reached by the next closest medium (billboard advertising at 21%). That's true even among heavy TV and heavy internet users. The new study also shows AM/FM radio ads spark a consumer response: 4 in 10 Americans say they have visited an advertised restaurant or advertised store, attended an advertised event, watched an advertised TV show or talked about the ad or product with others after hearing an ad on AM/FM radio. In another finding with implications for radio sales departments, the median age of heavy radio users (42) is closer to that of the U.S. population than heavy TV users (median age 50) and heavy internet users (median age 33). The study also debunks the myth that heavy users of one medium spend less time with another. For example, heavy TV and internet users spend as much time with radio as the average American.



KATZ MEDIA GROUP

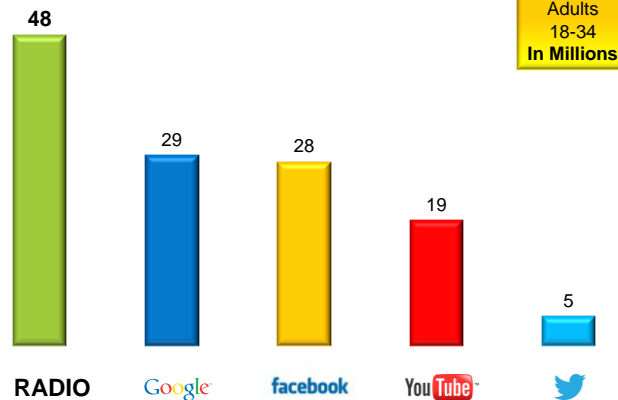


ARBITRON

Radio – The Original Social Network Connects with Young Adults

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

- 65% more will use Radio than will go to Google Search
- 70% more will use Radio than will go to Facebook
- 150% more will use Radio than will go to YouTube
- 850% more will use Radio than will go to Twitter



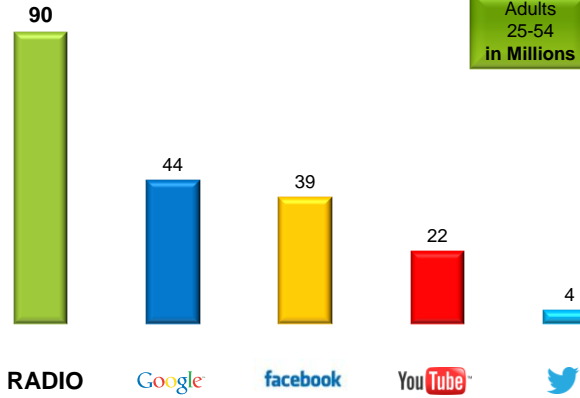
Every day, more than 2/3 of people 18-34 invite Radio to be a major part of their lives

Source: comScore Inc Ratings for February 2013 Average Daily Unique Visitors 18-34, factored to include mobile and pc; RADAR 116 March 2013, P18-34, 6A-12M

Radio – The Original Social Network Connects with Adults 25-54

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

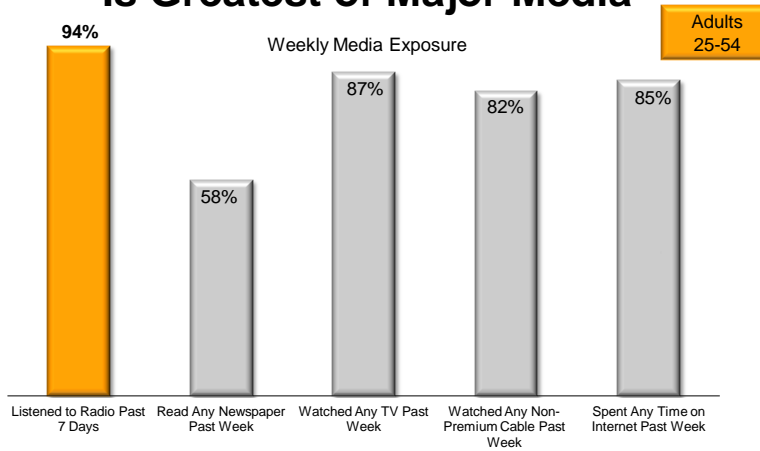
- **100%** more will use Radio than will go to Google Search
- **130%** more will use Radio than will go to Facebook
- **300%** more will use Radio than will go to YouTube
- **2150%** more will use Radio than will go to Twitter



Every day, nearly **3/4** of people 25-54 invite Radio to be a major part of their lives

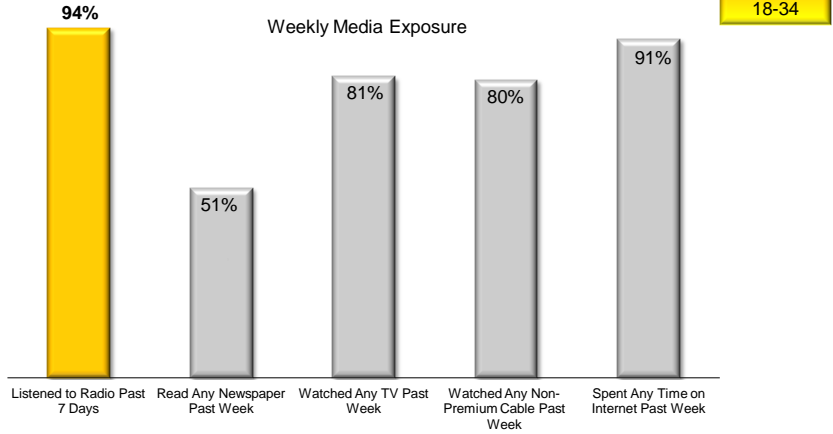
Source: comScore Inc Ratings for February 2013 Average Daily Unique Visitors 25-54, factored to include mobile and pc; RADAR 116 March 2013, P25-54, 6A-12M

Radio's Weekly Reach of Adults Is Greatest of Major Media



Source: Scarborough USA Plus - Release 2 2012 12 Month Adults 25-54 (Sample Size: 86,420)

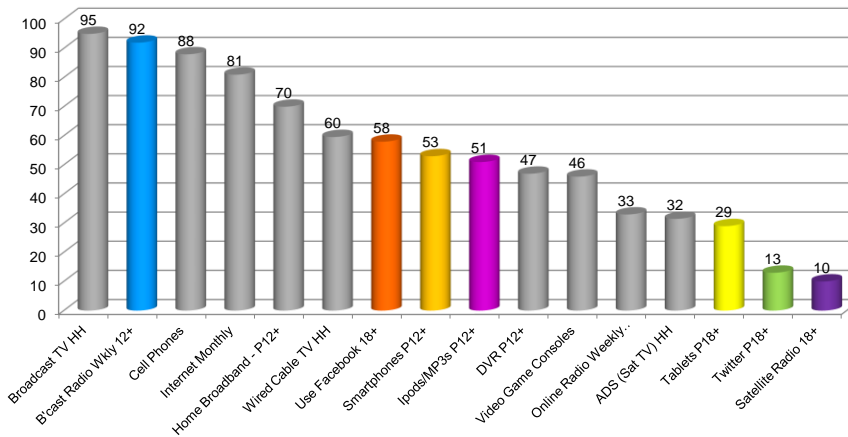
Radio's Weekly Reach of Adults Is Greatest of Major Media



Source: Scarborough USA Plus - Release 2 2012 12 Month Adults 18-34 (Sample Size: 28,781)

Which Media Can Deliver Mass Reach

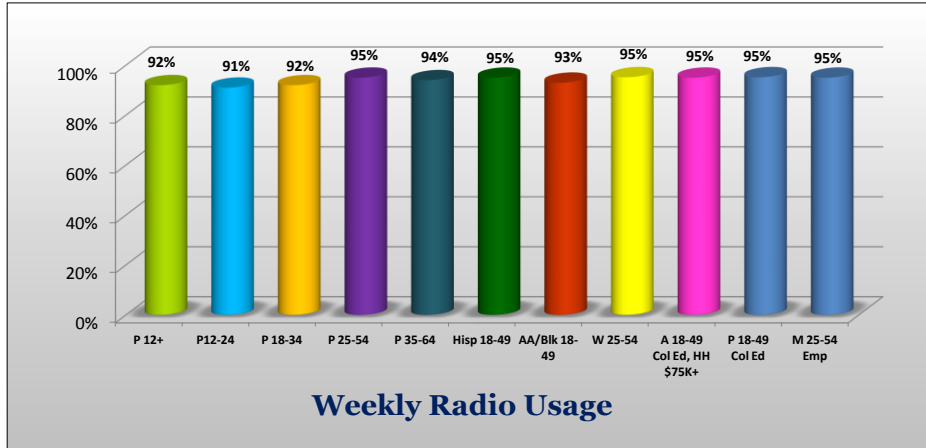
What % own or have access to these platforms or devices: % Population/Household Penetration



Source: TV HH, Nielsen Cross Platform Report March 2013; wkly Radio, Arbitron RADAR 116 March 2013 M-Su M-M; Internet, Pew Internet & American Life Project September 2012 Study; DVR, Video Game Consoles Nielsen May 2012 National People Meter Panel; Cable & ADS November 2012 Nielsen Report; Online Radio, Smartphones, iPods/MP3s, Tablets and Social Net Usage Edison Media Infinite Dial 2013; Hi speed Internet Access from Pew Internet & American Life Project May, June 2012 Tablets Pew Internet & American Life Project October 3, 2012; satellite radio, Scarborough USA Plus - Release 1 2012 12 Month; Twitter, Pew Research Center's Internet & American Life Project Post-Election Survey, November 14 - December 09, 2012. N=1,802 internet users. Interviews were conducted in English and Spanish and on landline and cell phones

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

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



Source: RADAR 116 March 2013, Mon-Sun 6A-Mid Weekly Cume

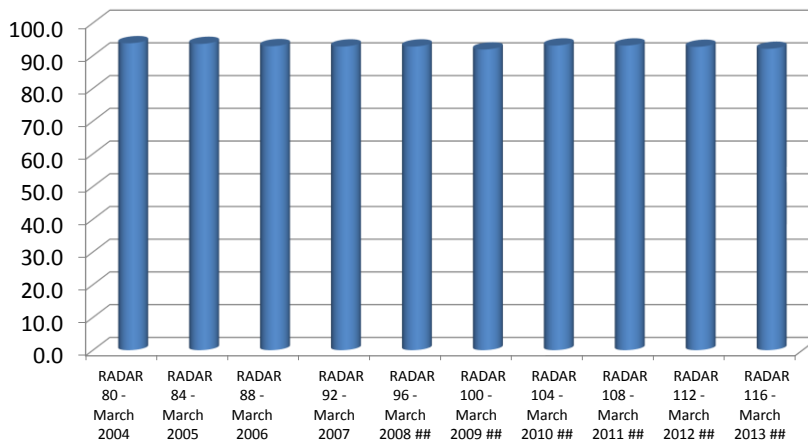


KATZ RADIO GROUP



Radio's Weekly Reach Remains Consistent

% Wkly Cume
Persons 12+

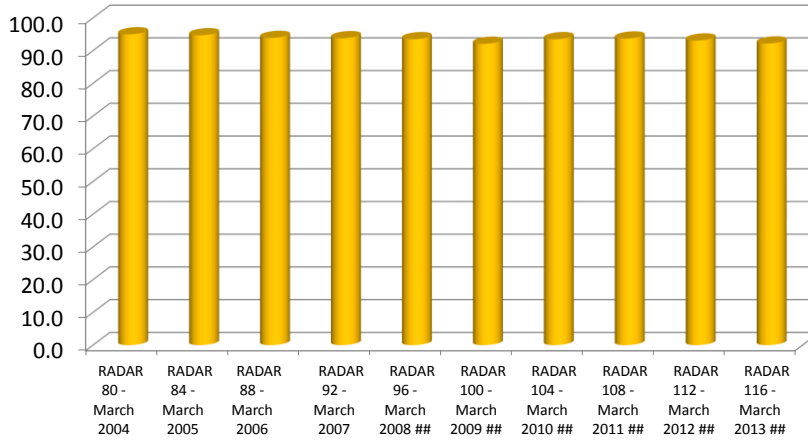


Indicates that beginning with the RADAR 96 March 2008 report, the audience estimates produced may be based on varying combinations of PPM and Diary respondents until 2011 when measurement mix became consistent

Source: RADAR 80 - March - RADAR 116, March 2013; Persons 12+; Monday-Sunday 6am-12midnight; Weekly Cume Persons and Rating.

Radio's Weekly Reach Remains Consistent

% Wkly Cume
Persons 18-34



Indicateds that beginning with the RADAR 96 March 2008 report, the audience estimates produced may be based on varying combinations of PPM and Diary respondents until 2011 when measurement mix became consistent
Source: RADAR 80 - March - RADAR 116 <arch 2013; Persons 18-34; Monday-Sunday 6am-12midnight; Weekly Cume Persons and Rating.

Americans are consuming more media than ever. Radio and TV dominated the media landscape in 2003. Fast forward 10 years and more than half of Americans own a smartphone and two in three have an internet Wi-Fi network at home. While the media landscape has changed dramatically in the past 10 years, the net effect is that Americans are spending more time with media. The combined time spent per day with radio, TV and the internet gained more than an hour since 2003 to reach 8 hours 15 minutes in 2013. That finding from Edison Research and Arbitron's latest Infinite Dial study offers further evidence that digital platforms enhance — rather than replace — media usage. “Digital platforms have expanded opportunities for consumers to use all media at new times and in new places versus what they could do just 10 years ago,” Arbitron SVP of marketing Bill Rose says. The national telephone survey of 2,021 people aged 12+ was conducted in January and February. The estimates are based on self-reported consumer behaviors.

RADIO OWNS THE AUTOMOBILE



4-3-13

The Infinite Dial data shows what many readers already know, consumers want in-car entertainment at their fingertips. In the automobile, back in 2010 only 6 percent of cell phone users listened to audio in the car. In 2013, that number is now 21 percent. Radio still dominates in-car listening, with 84 percent stating they listen to AM/FM. Surprisingly, 63 percent say they listen to CDs and only 12 percent listen to online radio.

Fifty-eight percent say they use AM/FM all of the time or most of the time while only 4 percent say they listen to online radio all of the time or most of the time when connected in the car. Those online numbers are expected to grow as the number of automobiles with Bluetooth technology increases. Only 28 percent of the vehicles on the road have Bluetooth and only 6 percent have in-dash infotainment systems like Ford Sync, according to this study.

4-3-13 **NPD CONFIRMS: RADIO STILL DOMINATES LISTENING**

U.S. Digital TV Users Soaring

by [Wayne Friedman](#), Yesterday, 10:53 AM

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[digital](#), [streaming](#), [tv](#), [tv everywhere](#)



U.S. digital TV users are climbing faster than expected.

The number of U.S. digital TV users -- those who view at least one TV show per month via the Internet -- will climb 37% in four years to 145 million in 2017, from 106 million in 2012. This amounts to digital TV user growth climbing at a 6.9% compound annual growth rate -- a higher increase than previously forecast in August 2012 by eMarketer.

Next year, it says digital TV viewers will cross a critical tipping point -- surpassing 50% of the U.S. Internet user population. Those users who watch at least one movie per month on any Internet-capable device will climb to 115 million in 2017 from nearly 80 million in 2012, a 9.7% annual growth rate.

A Belkin and Harris Interactive survey of U.S. Internet users said 12% would consider replacing their cable or satellite subscription with a streaming media subscription, such as Netflix or Hulu Plus in 2013. A total of 30% of respondents were inclined to at least consider cord-cutting.

Still, another 37% "strongly disagreed" when asked whether they would consider replacing cable and satellite with only digital Internet TV.

Evidence of growing digital TV/movie usage, says eMarketer, comes from Netflix -- which reported U.S. streaming revenues of \$2.19 billion for 2012, growing moderately from quarter-to-quarter, with its U.S. rental DVD revenues totaling \$1.14 billion and declining each quarter.

RADIO REMAINS STRONG EVERYWHERE

4-2-13

In conjunction with Edison Research, Arbitron presented "Infinite Dial 2013" Tuesday afternoon in a one-hour webinar. The data, collected from 2,021 people in both English and Spanish, gives broadcasters details on how consumers use media and technology. The data, presented by Bill Rose of Arbitron and Tom Webster of Edison, showed more and more people are connecting via broadband and Wi-Fi, more people are connecting in their automobiles, and as more people connect, radio usage is increasing.

When Arbitron and Edison presented Infinite Dial in 2003, they reported radio had 223 million users every week. There were 178 million consumers on the Internet and 33 million people using broadband. In 2013, the study showed 243 million weekly radio users, 232 million people surfing the Internet, and 182 million people had connected with broadband. Wi-Fi, which hardly showed up in the 2003 report, had 177 million users in 2013.

According to the study, 120 million Americans have listened to online radio in the last month and 86 million in the last week. And they listen for about 12 hours every week. The good news for radio is that,

according to the study, 82 percent of the online listeners also consumed traditional radio over the air and only 6 percent listened to online radio exclusively.

AM/FM Still 'King of All Media' In-Car

by Leslie Stimson

on 04.03.2013

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AM/FM radio continues to be “the king of all media” in the car, but expect smartphone connectivity to grow in-vehicle, according to Arbitron SVP Marketing Bill Rose.

That’s a big takeaway from the latest Infinite Dial study by Arbitron and Edison Research.

AM/FM radio leads over other in-car audio options at 84% of drivers who had “ever” used this option, compared to 63% who used a CD player and 29% who used an iPod/MP3 player. Fifteen percent said they listened to satellite radio, followed by online radio at 12% and HD Radio at 3%.

When asked what audio option they use most of the time in the car, 58% said AM/FM radio, followed by 15% who mainly listened to CD players and 11% who said online radio. Satellite radio followed at 10%, followed by 4% for online radio and 1% who said HD Radio.

“We think Bluetooth availability will have a big impact” on these numbers, Rose said. Nearly three-in-ten, or roughly 28%, said they have a Bluetooth connection in their car. “This number is going to grow and it’s worth keeping an eye on,” said Rose.

Ditto for in-dash infotainments systems. while only 6% have them now, researchers expect this figure to increase over time as well.

Also, one-in-five (21%) have used their cellphone to listen to online radio in a car. That compares to 6% who did so in 2010.

The use of podcasting has slowed as more Americans have DVRs in their home.

Some 45% of consumers have a DVR in their home now, compared to 28% in

2008.

Radio stations may want to relaunch their podcasts to a wider audience and claim ownership of time-shifted radio, said Edison Research VP Strategy & Marketing Tom Webster.

This is the 21st Infinite Dial study. Researchers interviewed more than 2,000 people about their use of digital platforms and new media. Download the study from either www.arbitron.com or www.edisonresearch.com.

Zillow puts radio to the ROI test — and now it's on the 2013 media plan. **The real estate website Zillow spent the second half of last year trying various forms of advertising, including radio, television, online and mobile in what CEO Spencer Rascoff says were relatively small experiments in ROI. The test phase is over. As Zillow ramps up a “meaningful increase” in ad spending, it confirms radio will be part of the mix. “Following highly-measured testing in 2012, we are now stepping on the gas in 2013 in several advertising channels that showed promise last year,” Rascoff says. Zillow isn't releasing specifics about its media plan but confirms it will hike advertising budgets by 70% compared to last year as it markets to home buyers. Besides radio, Zillow will buy television and some forms of online advertising that also passed its ROI test. “The prime reason that we're advertising is because we think there is an opportunity to create a much more well-known brand, which then drives greater revenue growth down the road,” CFO Chad Cohen told analysts this week as the company explained why it was implementing such a big increase in marketing budgets. As the real estate market has recovered, the National Association of Realtors has also been ramping up its radio spending. Media Monitors says it was radio's No. 79 largest-volume advertiser last year, airing 195,404 spots**

Radio faces a new TSL reality. Though radio's cume remains remarkably steady at 92% of the U.S. population, **time spent listening among persons 12+ dropped by 3.2% from April 2010–March 2012, according to Arbitron RADAR data. The decline may be slightly inflated since 15 of the 240 markets measured by RADAR were transitioning to PPM in 2010.** The data shows TSL declines appear to be larger among younger demos. That may sound alarming, but CBS Radio SVP of programming Greg Strassell doesn't believe it's a universal problem. “The big brands that do it well are holding TSL,” he says pointing to young adult L.A. powerhouses like KROQ, KIIS and KPWR, where year-over-year TSL is holding steady or growing. To remain relevant to younger listeners, Strassell says radio must not just reflect the buzz but help create it. Radio is hardly alone in confronting digital disruption. **In the past year, three of the big four broadcast TV networks experienced audience drops ranging from 2% to 8%,** according to Nielsen. And the percent of U.S. adults who say they read a newspaper yesterday (print or online) has declined steadily to 43%, according to Scarborough. More fragmentation is a virtual certainty. **“You will see satellite, Pandora and Spotify decline as more entertainment becomes available,”** Entercom SVP of programming Pat Paxton says. Emmis CEO Jeff Smulyan believes some listening has shifted over to radio's digital platforms. “We live in a fragmented world and people have more choices,” he says.

More digital choices are expanding the radio landscape. Radio's first inclination may be to wave the finger of blame for TSL declines at internet radio, and there's evidence it is a factor. Web radio has exploded during the past four years, experiencing a 243% increase in domestic Average Active Sessions from 2009 - 2012, according to Triton Digital data. With smartphone penetration gaining critical mass, internet radio hit a dramatic inflection point in late-2011 as listening sessions skyrocketed 60% from third quarter 2011 to fourth quarter 2012 (see chart).

The issue may not be whether listening to streaming is cannibalizing broadcast radio but rather how much it is increasing listening to broadcast radio brands. "Overall audio listening is increasing as more options are available to the listener," DTE Research CEO Dr. Tom Evans says. "It does not mean that a listener decides to switch to one device over another as much as new options make for easier listening." For example, a sports fan may listen to his local ESPN Radio affiliate when he's in town but tune to ESPN Radio on satellite radio when he can no longer pick up the local station on his car radio. A KLLS-FM, Los Angeles listener may tune to the station in the car but listen to the station stream on her smartphone or desktop computer at work. In both cases the brand is increasing its listening but may not receive full credit for it in Arbitron ratings.

Radio's inherent strengths hold key to winning against new competitors. Digital platforms have made it easier for listeners to spend more time with radio while swinging the door wide open to new competitors. In December web pureplays accounted for 78% of all U.S. web radio listening measured by Triton Digital, compared to 22% for broadcast streams. That's practically an inverse from three years ago

Although it launched in 2006, today is the first time Slacker has focused on a concentrated effort to market the company, rather than its offering. Jim Cady, its CEO, says that over the years, it has been quietly building a scalable business that now has more than 500,000 paying subscribers and over 4 million monthly average users. He believes that 2013 will be a "blockbuster" year as it seeks to finally ramp up its marketing initiatives and expand its audience

- **At retail conference, talk turns to radio advertising.** What do consumer brands say about radio when the radio sales reps aren't in the room? Broadcasters might be surprised. Bank of America Merrill Lynch's annual Consumer and Retail Conference was held last week in New York and while ad buying strategies weren't on the agenda, the topic of radio came up several times during the two-day event — especially by restaurant chains taking a fresh look at the medium. Cheesecake Factory CFO Doug Benn told investors that social media may have the sizzle a restaurant chain craves, but last year they decided to reconsider traditional media. "The really good news about us using traditional marketing, such as billboards or signage in malls or radio, is that it did move the sales needle, and it moved it quite significantly," Benn said. Like most consumer and retail brands, it's the foot traffic and return-on-investment sales that measured ad campaign success. "What we did last year was successful enough where we want to continue that test in other markets this year," Benn said. Instead of allocating more dollars to marketing, the restaurant chain is shifting share to radio and other traditional media. Cracker Barrel has historically used spot radio for what CFO Larry Hyatt told the conference has been more of a product message, highlighting limited-time menu items. "Radio continues to be an effective medium, but it appears we have opportunities in radio

to get even better," Hyatt said. Finding ways to improve the effectiveness of its radio spots is "very high" on the company's list of things to do in 2013. "We continue to think it's an important medium," he said. Other companies are finding ways to get radio into the media mix. Denny's CFO Mark Wolfinger said they continue to spend 35 to 40 weeks a year using national TV but over the past four years they've created a local co-op marketing budget that allows their 272 local franchisees to buy radio time during the off-weeks.

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- **ARBITRON: "242.8 MILLION LISTEN EVERY WEEK"**
- 3-11-13
- From the RADAR 116 National Radio Listening Report, Arbitron says radio's audience increased year over year, adding more than 1.6 million weekly listeners. And, according to Arbitron, radio now reaches 242.8 million listeners in an average week. Teens 12 to 17 show the largest gains, according to the report, with radio reaching nearly 23 million teens in an average week. 66.5 million adults 18 to 34 listen to radio every week, according to Arbitron, which translates to 92 percent of the people in that demographic.
-
-
- Arbitron announced details from its March 2013 RADAR 116 National Radio Listening Report, including the good news that the audience was up year over year by more than 1.6 million weekly listeners. Radio now reaches 242.8 million listeners on an average weekly basis.
- Teens 12-17 showed the largest gains among the major age demos. Radio now reaches nearly 23 million teens in an average week. Radio listening also remains steady among Adults 18-34, reaching 66.5 million people, or 92%, in this demo.
- According to the report, radio saw gains in the Black (non-Hispanic) audience across all major demographic groups versus the March 2012 report. The Hispanic audience also grew, adding nearly 1.1 million listeners in an average week.
- Radio's Black (non-Hispanic) audience aged 12+ added 741,000 weekly listeners versus the March 2012 RADAR report. Radio reaches more than 92% of Black (non-Hispanic) listeners aged 12 and older in an average week.
- Black (non-Hispanic) Adults 18-34 shows the most gain, adding more than 200,000 listeners in an average week, versus the year ago report.
- Radio now reaches more than 39.5 million Hispanics 12+ in an average week, or 95% of this demo.
- Hispanic adults aged 25 to 54 shows the largest gains, adding more than 1.1 million weekly listeners versus the year ago report.
- A new feature in the RADAR 116 March 2013 report is the inclusion of listening metrics for HD multicasts and AM/FM/HD streaming stations. The data shows that radio is using new platforms effectively to reach more listeners. According to the RADAR March 2012 report, HD multicasts reach nearly 3.6 million Persons 12+.
- Streams of AM/FM/HD radio also reach a broad audience. More than 5.4 million persons 12+ tune into AM/FM/HD streams during an average week. Adults 18-49

- make up the majority of this audience, with more than 3.5 million people in this demographic accessing streaming AM/FM/HD stations in an average week.
- The sample size for the RADAR March 2013 is 395,844 persons 12+. The report includes data from all 48 Arbitron PPM markets.

Five Ways to Connect With Millennials... Yes, via Radio

by [Mary Beth Garber](#) |
March 22, 2013

Most people's perception of whether Millennials like radio could do with a splash of cold water and a stream of cold, hard facts.

In fact, if you are between 18 and 34, you are far more likely to be pulling your ears away from AM/FM radio than your eyes away from Facebook to read this article: 92% more likely, actually. Way more Millennials will use radio this week than they will YouTube or Twitter.(1)

Each week, 93% of Millennials (or more than 62 million of them) spend over 2.5 hours per day listening to radio. That's more than a year ago. Or any time in history.(2)

Ah, but what about custom music streaming (e.g., Pandora) and other technological developments? Have they replaced listening to radio among 18-34s? No. In fact, research from 11 sources has concluded that streamers tend to be heavier users of radio than the average person. For example, in November 2012, Vision Critical concluded that "Pandora listeners report spending 50% more time listening to AM/FM radio than non-Pandora listeners."

Why do 93% of 18-34-year-olds spend 2.5 hours listening to AM/FM radio stations daily via radios, mobile devices, computers, in cars, and other means?

Recent studies tell us that more than half them say that radio "energizes" them or "improves your mood." It makes them happy, in other words. Millennials feel down or lonely, or they want the comfort of a familiar voice, or they want just to be entertained... as most people do. Maybe more so. More of them said they'd be more disappointed if their favorite radio station went away than if Facebook went away (62% vs. 45%).(3)

Here's how to put this phenomenal medium to work for you to reach Millennials.

1. Think connections

Use radio stations to take you to the listeners. Stations have huge fan clubs, opt-in databases, Facebook friends, and Twitter followers—and an unbelievable number of listeners who will show up to have fun.

That's why radio stations have lots of events, big and small, whether it's hosting Maroon Five for an in-studio live concert for a few privileged listeners or presenting a huge concert featuring listeners' favorite artists. Get involved by participating in the production and promotion of such events.

A recent illustration: a major department store used radio for a contest in which listeners nominated and voted for their favorite "undiscovered" artists, the rising stars of tomorrow. The department store participated every step of the way, on-air, online, texting, Facebook, Twitter, as the results were announced at different stages of the promotion. The winning artist made exclusive appearances at the stores, where all the fans and people who participated in the promotion showed up to see their artist.

Get the station to get you involved. The connections are incredible.

2. Use the friend factor

Most listeners—especially Millennials—feel as if radio personalities are friends. They friend them on Facebook, follow them on Twitter, and, most of all, they listen to them consistently every week, sometimes every day. Listeners trust these people. They know them. Or at least they feel as if they do, a phenomenon documented by a study from the University of Southern California's Annenberg School of Communications.

Several studies show that using radio in a media mix particularly increases affinity for and advocacy of an advertiser. Capitalize on the popularity of radio personalities to add credibility and likeability to your product/service. For example, for the premiere of the TV show "Opening Act," The CW had radio personalities on more than 100 stations introduce the show and its premise before segueing into the next song. The show had a killer opening week.

3. Take it off the air

Create your own event or happening that profiles your product/service, and promote it with and via radio stations. The CW (which knows how to use radio to move its core audience of Millennials) promoted the premiere of "Heart of Dixie" by having personalities invite listeners

to view a private sneak-peek of the show. Listeners registered on-air and online for a chance to see a "Southern Fried Screening" on Southern-style venues such as riverboats and Southern restaurants.

4. Create in-programming placement opportunities

Think outside the spots. For example, a jewelry store might team with a radio station for a Valentine's Day promotion asking people to submit a song suggestion for their valentine via text, Facebook, Twitter, or the station's website. Listeners can see the list and vote, and encourage their friends to also vote for their songs. The station then plays the top 10 selections on Valentine's Day to accompany dinner. All of it brought to listeners by the jewelry store.

5. Do great spots that have a great tagline

There are apps for everything, and several let listeners vote on the commercials that are running on-air and then discuss them on the station's website, Facebook fan page, and Twitter. Don't be afraid to encourage the stations' listeners to give you direct feedback on your commercials.

By the way, personalities will also comment on great spots. They will parody them, and people will then repeat them. A great tagline or jingle will become part of the vernacular. Recently, one station created a such a catchy jingle for a car dealer that listeners voted it the best song of the week. The dealer was astounded by the business that followed the start of the campaign.

* * *

Another tip: consistency. The thing to remember is that radio stations are like virtual neighborhoods. They appeal to certain groups of people who come back to the stations every week—those who feel affiliated with the station and the personalities and the advertisers that have become a part of their neighborhood. So create your own virtual spot within those virtual neighborhoods. Especially for Millennials, who love their radio stations and the advertisers on them

Vision Critical Finds AM/FM Radio Holds Competitive Edge for Music

News - Published Date: Friday, March 15, 2013

While Two in Three Adults Listen to Music on Broadcast Radio Weekly, New Music Platforms are Playing a Bigger Role

Toronto, CANADA - March 18, 2013 - Vision Critical, the leading provider of insight community technologies, in conjunction with Canadian Music Week, today released online survey results that show that broadcast radio stations continue to be the leading music source for North American adults. However, a wide range of digital options appear to be closing the gap.

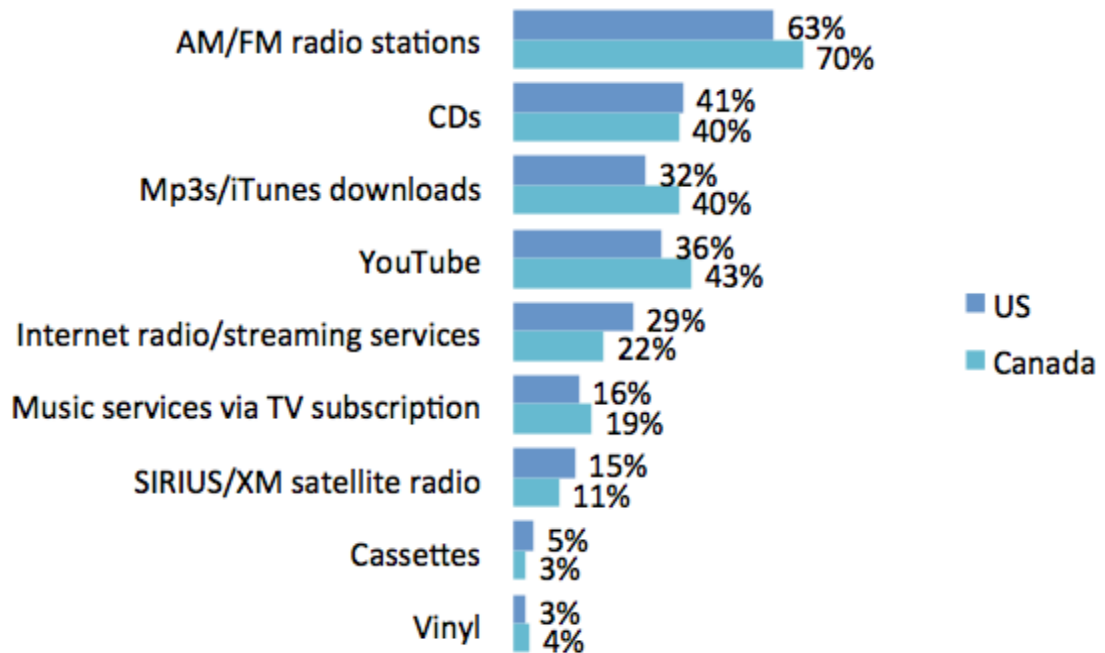
Nearly two-thirds of North American adults reported listening to music on AM/FM radio stations via standard or streamed radio in the past week. Responses show that Canadian adults are slightly more inclined to listen to broadcast radio than Americans—70 percent compared to 63 percent listen weekly.

Though AM/FM usage remains considerably higher than competing platforms, emerging music sources such as YouTube, music download services, Internet radio and streaming services have gained a foothold among online adults.

Key findings include:

- YouTube is a widely used platform for listening to music, especially among 18 to 34 year old adults. About 66 percent of 18 to 34 year old Canadians and 61 percent of 18 to 34 year old Americans listen to music on YouTube. This is virtually the same proportion of 18 to 34 year old adults who listen to music on broadcast radio stations (66 percent in Canada and 62 percent in the U.S.).
- Though music consumption patterns are generally similar between Canada and the U.S., the use of Internet radio and music streaming services is considerably higher in the U.S. More than one in four American adults listen to music on the Web, whereas only about 20 percent of the Canadian adult population do so where services such as Pandora and Spotify are not available.

% Reported Listening to Music in Past Week, by Source



Base: US online adults, aged 18+ ; Canadian online adults, aged 18+

Thinking back over the past week or 7 days at home, work or elsewhere, which, if any, of the following sources have you used to listen to music?

“We are seeing that music and in fact, radio itself are shifting platforms. This is not necessarily at the expense of broadcast radio but as a result of the expanding array of music platform choices,” said Jeff Vidler, senior vice president of media and entertainment at Vision Critical. “Radio still plays a key role in keeping its listeners connected, but digital options are clearly moving into the pure music position.”

Survey Methodology

The survey was conducted between March 19-20, 2013 among 1,506 Canadian adults ages 18 and over and 1,004 American adults ages 18 and over. Email invitations were sent to members of the Vision Critical Market Panels, offering a nationally representative sample for Canada via the Angus Reid Forum and for the United States via Springboard America. The survey was fielded in association with Canadian Music Week, March 19-24, 2013 at the Marriott Eaton Centre in Toronto.

RADIO LISTENERS IN THE NEW YORK AND WASHINGTON, DC, AREA HAVE THE LONGEST COMMUTES OF ALL ARBITRON RADIO METROS

Radio rides shotgun on America's daily commute

COLUMBIA, MD; March 6, 2013 Commuters in the suburban radio markets surrounding New York and Washington, DC, spend the most time getting to their jobs each workday, according to a newly released Arbitron analysis of commuting data from the 2007–2011 U.S. Census Bureau's American Community Survey, using Fall 2012 Arbitron Metro definitions.

Commuters in Sussex, NJ, suffer the most compared to their workday compatriots in the rest of the Arbitron radio Metros. Sussex commuters spend an average of slightly more than 37 minutes getting to work; Fredericksburg, VA, is number two, also at slightly more than 37 minutes.

Arbitron compiled average commuting times for employed residents of its 275 radio Metros using the U.S. Census Bureau's American Community Survey from 2007-2011, providing radio stations with average commuting data for their specific radio market.

Since 84 percent of all drivers or passengers report use of AM/FM radio in-car, Arbitron also analyzed which formats were top in morning drive and how much time is spent listening to the radio during morning drive (Monday-Friday 6AM-10AM) in an average week.

Top 5 Markets by Commute Time: Average Travel Time to Work

Average Daily Travel Time to Work minutes.seconds	Metro Name	Format of Top Station (P 18+ AQH Share; M-F 6AM-10AM)	Weekly Time Spent Listening for Total Market (P18+; M-F 6AM-10AM)
37.7	Sussex, NJ	Adult Contemporary	5:00
37.6	Fredericksburg	Country	4:45
34.7	New York	All News	3:15
34.1	Frederick	Country	4:30
33.6	Washington, DC	News/Talk	2:45

*AQH and TSL data based on most recently released survey period
Public Transportation a Factor for Time Spent Listening in Morning Drive

While the New York and Washington, DC, Metro are among the top five Metros for commute time, their morning drive Time Spent Listening is not on par with the other three leading commute time markets.

One possible reason— these two markets are also the leading markets for public transportation. In New York, 31.6 percent take public transportation to work; in Washington, DC—14.7 percent.

Without a dashboard radio to accompany their commute, many bus and subway commuters aren't available to contribute to the morning drive Time Spent Listening.

Bottom 5 Markets by Commute Time: Average Travel Time to Work

Away from Eastern seaboard highways and West Coast freeways, commuters in middle America have an easier time of their journey to work. Grand Forks, ND-MN, with an average commute time of just over 14 minutes, has the lowest commute time to work of all 275 metro markets.

Average Daily Travel Time	Metro Name	Format of Top Station (P 18+ AQH Share; M-F	Weekly Time Spent Listening for Total Market
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to Work minutes.seconds		6AM-10AM)	(P18+; M-F 6AM- 10AM)
14.5	Grand Forks, ND-MN	Album Oriented Rock	5:15
14.7	Grand Island-Kearney, NE	Country	5:30
15.5	Cheyenne, WY	Classic Hits	4:45
16.1	Wichita Falls, TX	Country	4:30
16.2	Mankato-New Ulm-St. Peter, MN	Country	5:15

*AQH and TSL data based on most recently released survey period

To view a full list of all 275 markets, visit the following URL:

[http:// www.arbitron.com/study/commute_times](http://www.arbitron.com/study/commute_times)

Hotter role for radio in Buffalo Wild Wings’ media recipe. The restaurant ad category has been a tough one for radio in the past year as that industry has struggled to keep diners coming through the door. Buffalo Wild Wings has been one of radio’s growth stories, and the chain plans to spend more in 2013. **“For the first time, we’ll have a significant amount of national radio,”** CEO Sally Smith said. **She told analysts in a recent conference call that the chain expects to** increase its total marketing budget 6-7% this year. “Sports are the cornerstone of our brand,” Smith says. The casual restaurant has strong ties to sports. “Our new TV and radio spots will promote Buffalo Wild Wings as the official hangout of the NCAA March Madness,” Smith said. She notes February and March bring some of their biggest ad spending, with NFL-related commercials putting another focus on September and October. As an official sponsor of the NCAA, Smith says Buffalo Wild Wings has rights to customize its commercials for all 89 championships. **“We intend to increase our advertising presence over last year with more weight on radio to support all our marketing campaigns and sales driving initiative,”** Smith said. The Minneapolis-based chain has about 861 locations in 48 states. According to Kantar Media, Buffalo Wild Wings spent \$19.6 million on radio in 2012

CLEAR CHANNEL RAISES OVER \$1 MILLION FOR KIDS

Clear Channel Communities, the community engagement brand of Clear Channel, and 106.1 KISS-FM (KBKS) in Seattle raised \$1,009,271.52 for Seattle Children's Hospital during its 12th annual "Jackie and Bender's One Big KISS for Seattle Children's Hospital Radiothon." Hospital Board Member Michele Smith said, "It's truly incredible that Jackie and Bender's compassion for Seattle Children's inspires so many to give generously and has for 12 years."

106.1 KISS FM hosts Jackie and Bender broadcasted the stories of Children's patients, families, staff, and volunteers to listeners across the region, who responded with generous donations and helped 106.1 KISS FM reach the 2013 goal of \$1 million. Throughout the two-day radiothon, fans were encouraged to donate online, via text, and in an online auction as well as by joining the KISS for Kids Club, which allows listeners to sign up to make a monthly donation. Online donations will be accepted through the weekend at www.KISSFMSEATTLE.com. Listeners can also make a \$10 donation by texting the word CARE to 50555.

(AUDIO) RADIO'S CHALLENGE IS IN THE HOME

2-27-13

Larry Rosin (pictured) and Megan Lazovick of Edison Research presented detailed information about the Country radio listener at CRS yesterday in an "Ethnographic Study." Lazovick went out across the country and spent days with listeners, observing how they consume music and what the country music format means to them. In addition to reinforcing the fact that Country music songs make an emotional connection with the listener, Edison uncovered more details about how consumers take in their audio entertainment. And, it's all about the path of least resistance. If consumers are in their automobiles, the radio is a very easy selection. If they are in their homes however, radio is facing many more challenges. Listen to our interview with Rosin and Lazovick about this project [HERE](#).

According to CRS Executive Director Bill Mayne, "Their results yielded from this highly personal and rarely used ethnographic methodology exposes continued challenges for country radio in the coming years. We are optimistic that the points brought to light in this study will yield considerable discussion in radio circles in the months ahead."

Among the study's key findings were:

- Radio's competition is no longer only between stations. The fight today is against all of the other media: Television(outlets like CMT/GAC/TCN), YouTube, Pandora, and even personal mobile devices.

- People are choosing to listen to the device that presents the path of least resistance. In the car, that remains radio. At home or in the workplace, there is a much more competitive situation: television, in particular, at home and the Internet at work.

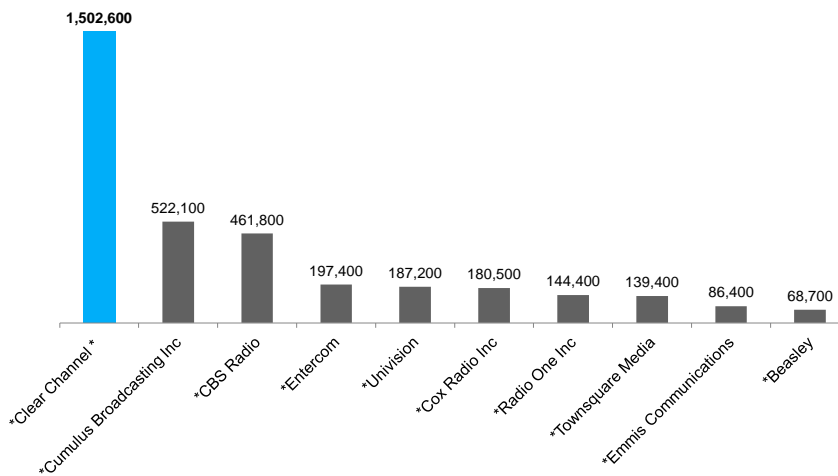
- If one listens to radio today, it is often devoid of emotion. And yet when you talk to people in their homes, they place the emphasis on the emotions that country music elicits.

- One of the challenges that Radio faces is the fact that country fans don't spontaneously equate country music strictly to country radio like the used to. This poses a challenge to radio provide talented DJs/hosts to guide the listeners in a more personal manner.

Rosin says, "For all of these nearly 40 years of radio research, we have concentrated largely on the hard facts of research, and the easily quantifiable – answering questions like: what portion of the audience likes this song? What portion of the audience works in an office? But while we call people on the phone, or now contact them on the Internet, or bring them to hotel ballrooms for auditorium music tests or to focus group facilities, there is one place that our research hasn't gone to – and that's straight to the homes of our listeners. And while there in the homes we found an entire line of inquiry we largely hadn't explored the emotions underneath our work and the real connections that people have to country music and country radio. Radio remains most people's primary way to interact with the Country Music they love."

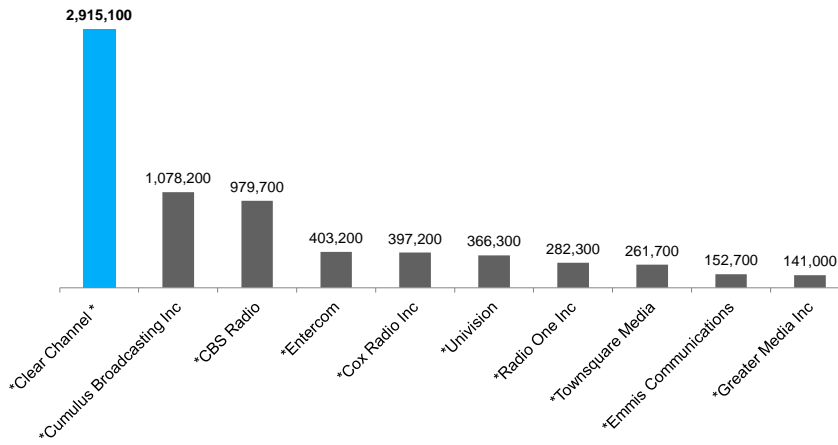
Radio's Sprint bill begins to take shape. About \$10,000 worth of inventory per station. That is what it will take for the radio industry to raise the \$15 million that's being pledged to Sprint in each of the next three years. In exchange for the money, the carrier guarantees to install and activate FM receivers in at least 30 million cell phones

Top 10 Radio Owners/Broadcast Groups – AQH Persons 18-34



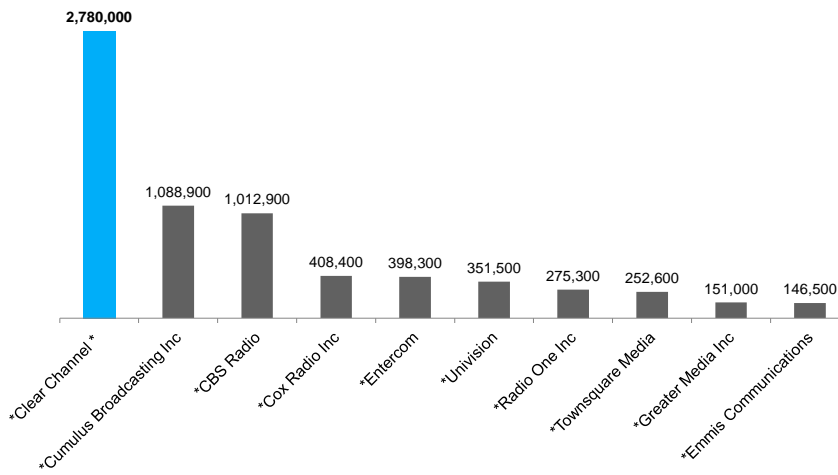
Source: Arbitron Spring 2012 NRD P12+ M-Su 12m-12m
 *Clear Channel includes Aloha Trust

Top 10 Radio Owners/Broadcast Groups – AQH Persons 18-49



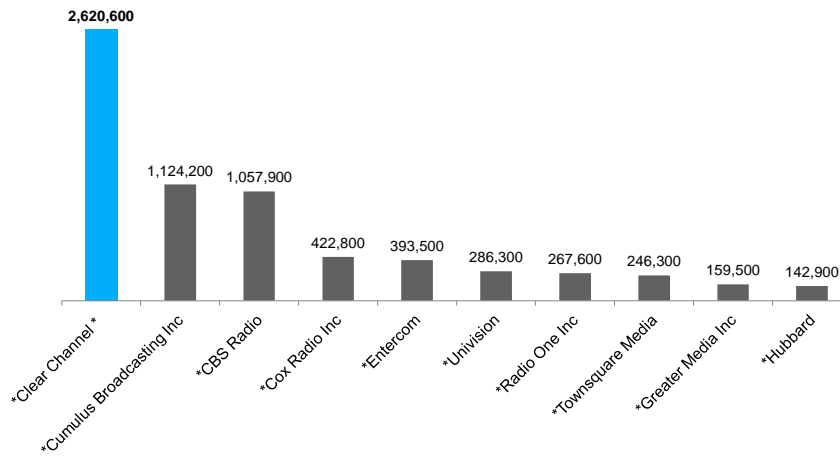
Source: Arbitron Spring 2012 NRD P12+ M-Su 12m-12m
 *Clear Channel includes Aloha Trust

Top 10 Radio Owners/Broadcast Groups – AQH Persons 25-54



Source: Arbitron Spring 2012 NRD P12+ M-Su 12m-12m
 *Clear Channel includes Aloha Trust

Top 10 Radio Owners/Broadcast Groups – AQH Persons 35-64



Source: Arbitron Spring 2012 NRD P12+ M-Su 12m-12m
 *Clear Channel includes Aloha Trust

ALL2012: All Stations 2012 (11/12/12)

Overview

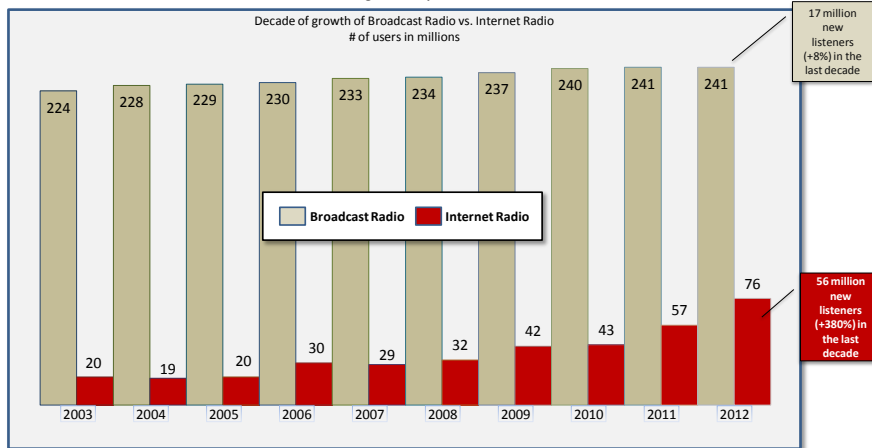
MSu 6a-12m

Demo	Pop.	In-Tab	AQH	AQH Rtg.	Dayparts Cume	Cume Rtg.
Persons 18-34	72,971,700	67,428	6,038,900	8.3	69,558,800	95.3
Persons 18-49	135,279,100	139,402	12,234,400	9.0	128,796,300	95.2
Persons 25-54	127,135,500	145,740	12,189,200	9.6	120,785,700	95.0
Persons 35-64	123,521,000	176,632	12,177,600	9.9	115,853,000	93.8

Broadcast Radio: A GROWTH Medium

With the digital revolution's impact on media, new forms of audio enter the marketplace regularly. Many think that these new digital audio platforms have hurt Broadcast Radio's impact. *Nothing could be further from the truth.*

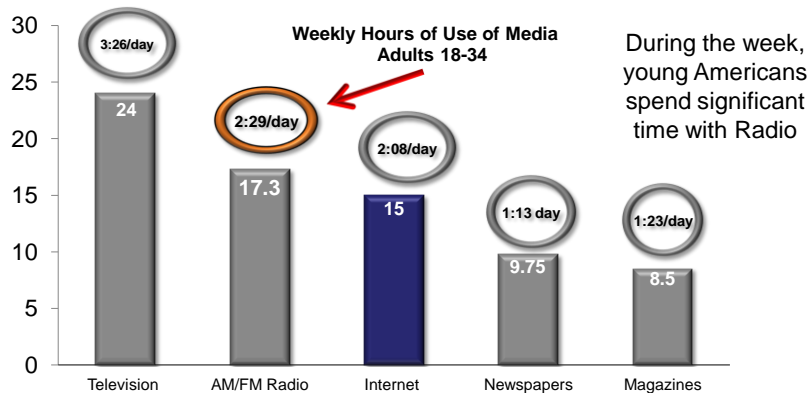
During the decade, Internet Radio added 56 million listeners. This growth did *not* occur at the expense of traditional Broadcast Radio which has also grown steadily during the decade ... with a gain of 8% and at the same time that Internet Radio has grown by 380%.



Sources: Arbitron RADAR Fall/December reports M-Su 6A-Mid - note, methodology for RADAR changed in 2008 to include PPM market transitions so trends may not be considered completely comparable until 2011; Arbitron/Edison Research for Internet/Online data; Weekly listeners for Broadcast Radio; Weekly listeners for



Young People Spend More Time With Radio Each Day Than With The Internet



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

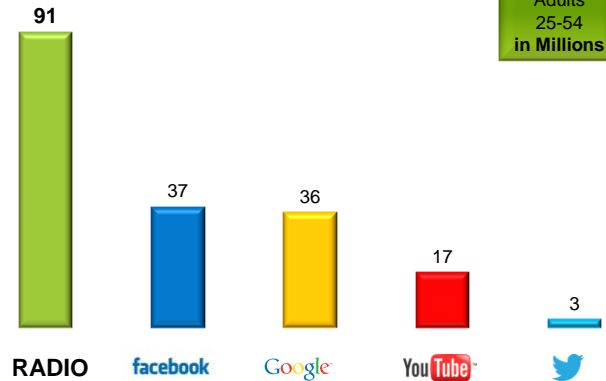
Source: 2012.2 USA TouchPoints



Radio – The Original Social Network Connects with Adults

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

- **145%** more will use Radio than will go to Facebook
- **153%** more will use Radio than will go to Google Search
- **435%** more will use Radio than will go to YouTube
- **2933%** more will use Radio than will go to Twitter

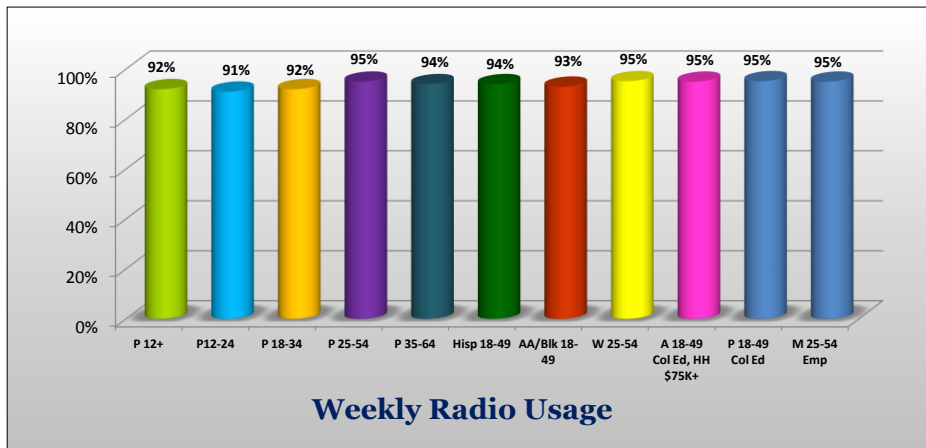


Every day, about **72%** of people 25-54 invite Radio to be a major part of their lives

Source: comScore Inc Ratings for July - September 2012 Average Unique Visitors, RADAR 115 December 2012, P25-54, 6A-12M

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

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



Source: RADAR 115 December 2012, Mon-Sun 6A-Mid Weekly Cume

KATZ RADIO GROUP

More 18-34 Adults use Radio each week than any other medium. (Scarborough USA+, Release 1 2012USA Adults 18-34, sample size 29,250)

More 25-54 Adults use Radio each week than any other medium. (Scarborough USA+, Release 1 2012USA Adults 25-54, sample size 88,248)

Radio reaches more Adults 18-34 during the work day than any other medium. (GfKMediaDay 2012 (Fieldwork 11-12/Doublebase Respondents) weighted to population (000) Base A18-34, Mon-Sun 5A-5P, sample size 1214)

The average person 12+ in the USA spends about 2 hours and 38 minutes a day with Radio. (RADAR 115 December 2012 Monday-Sunday 6AM-Midnight for Persons 12+, sample size 395,823)
18-34 Adults spend more time each day with radio than with the internet.

(2012.2 MBI - USA TouchPoints smartphone enabled National probability sample of 2,000 persons aged 18-64, Nested within GfK/MRI's Survey of the American Consumer)

Adults 18-34 are 52% more likely to be heavy users of radio than heavy users of television in the USA. (Scarborough USA Plus - Release 1, 2012, 12 Month Adults 18-34. Heaviest two quintiles of exposure, sample size 29,250)

70% of people with favorite Radio personalities follow them on social media. (USC Annenberg School for Communication & Journalism, PSI Study released June 2012, Woodley, P. and Movius, L. People With a Favorite Radio Personality in Los Angeles 617 respondents)

More than half of people with favorite Radio personalities have considered or purchased a product/service advertised during their favorite Radio personality's show. (USC Annenberg School for Communication & Journalism, PSI Study released June 2012, Woodley, P. and Movius, L. People With a Favorite Radio Personality in Los Angeles 617 respondents)

For the proof behind the facts and even more facts, refer to
http://www.arbitron.com/home/radiotoday_insights_library.htm#presentations

More people of all ages would be more upset to go without their Radio station than to go without Facebook. (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)

92% more Adults 18-34 use Radio on a typical day than Facebook. (comScore Inc Average Daily Visitors Ratings July-September 2012, RADAR 115 December 2012, P18-34, 6A-12M)

Only about 10% of Adults 18+ will listen to satellite radio in a week.
Nearly 93% of Adults 18+ will listen to Radio in a week. (Scarborough Release 1 2012 (Feb 2011 – Feb 2012, Adults 18+, M-Su 6a-Mid)

Radio reaches more than 90% of virtually any market segment each week. (RADAR 115 December 2012, Mon-Sun 6A-Mid sample size 395,328)

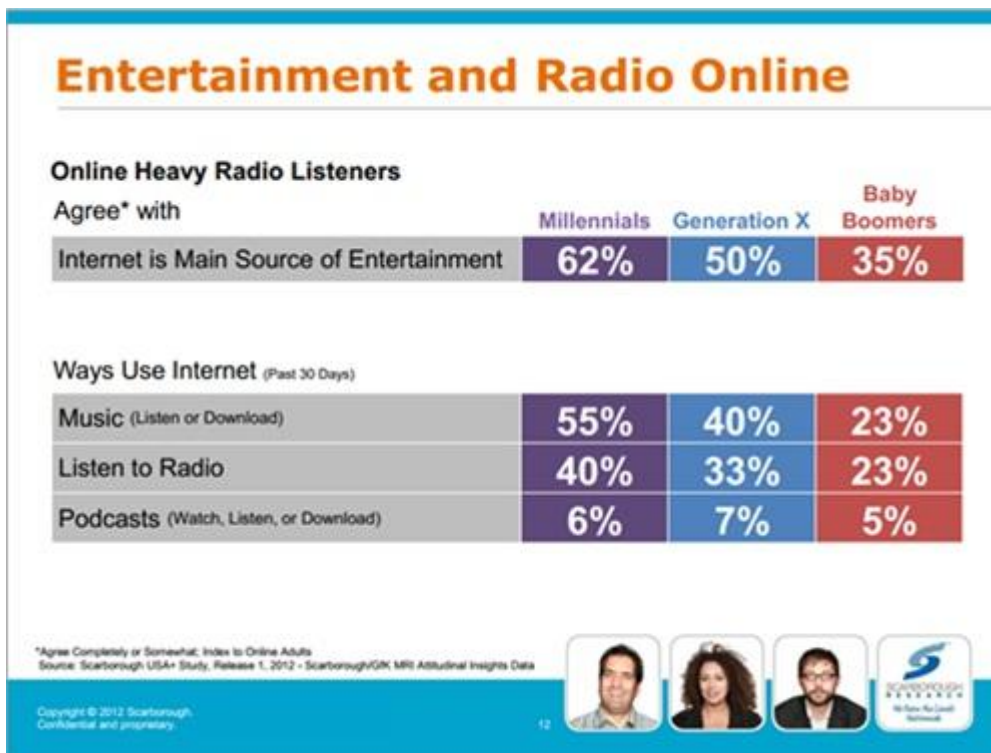
On Radio, the audience listening level from the beginning to the end of a 6-commercial break is 93% of what it was before the break. (Arbitron, Media Monitors and Coleman Insights "What Happens When the Spots Come On?" study of 866 radio stations measured by Media Monitors and Arbitron across all 48 PPM markets in the United States during the months of October 2010 through September 2011 covering a total of 17,896,325 unique commercial breaks involving

61,902,473minutes of advertising.)

Virtually all Radio Listening happens LIVE, in real time, while more than half the Adult 18-49 top 10 TV shows' ratings come from 7 day DVR viewing.(MediaLifeMagazine.com October 2012)

There are more than 11,000 commercial radio stations licensed in the US, more than ever before as radio continues to grow.(FCC July 2012)

Weekly time spent listening to radio declines by 28 minutes. The average American aged 12+ spent 13 hours and 51 minutes listening to radio a week, according to Arbitron's RADAR 113 report, which covers March 31, 2011–March 28, 2012. While that's a healthy number – nearly two hours a day – it's down 28 minutes a week from one year earlier: 14 hours and 19 minutes in Arbitron's RADAR 109, which covers April 1, 2010–March 30, 2011. More alarming are year-over-year declines among young adults. **Men 25-34 spent 51 minutes less with radio per week in RADAR 113 (15 hours) than in RADAR 109 (14 hours, 9 minutes).** TSL among women 25-34 also fell by a significant amount, from 12 hours, 55 minutes to 12 hours, 13 minutes, a year-over-year drop of 42 minutes. **Men 18-24 are spending 36 minutes less per week with radio, women 18-24 are listening 38 minutes less.** Demos with smaller declines than the 12+ average include women 35-54 (down 21 minutes), men 45-54 (down 17 minutes), women 45-54 (down 26 minutes), men 55-64 (down 15 minutes) men 65+ (down 26 minutes) and women 65+ (down 18 minutes). **Teen listening declined only eight minutes but the demo already had the lowest listening level of any: about eight hours a week for teenage boys and nine and a-half hours for girls.** The biggest TSL surprise: a 43-minute weekly decline among women 55-64. Both RADAR 113 and RADAR 109 include data from all 48 Arbitron PPM markets.



For radio, rolling with the changes

In 2012, ad spending was up and audiences grew

By Toni Fitzgerald