



SEPTEMBER 2017

STATE OF THE MEDIA: AUDIO TODAY 2017

A FOCUS ON NETWORK RADIO

A GOLDEN AGE OF AUDIO

MORE CHOICE AND MORE WAYS TO LISTEN FOR MORE AMERICANS

With each passing month (and year) the audio landscape grows a little larger. There are now more ways to listen to more kinds of specialized content than when the year began, and this trend shows no signs of slowing down.

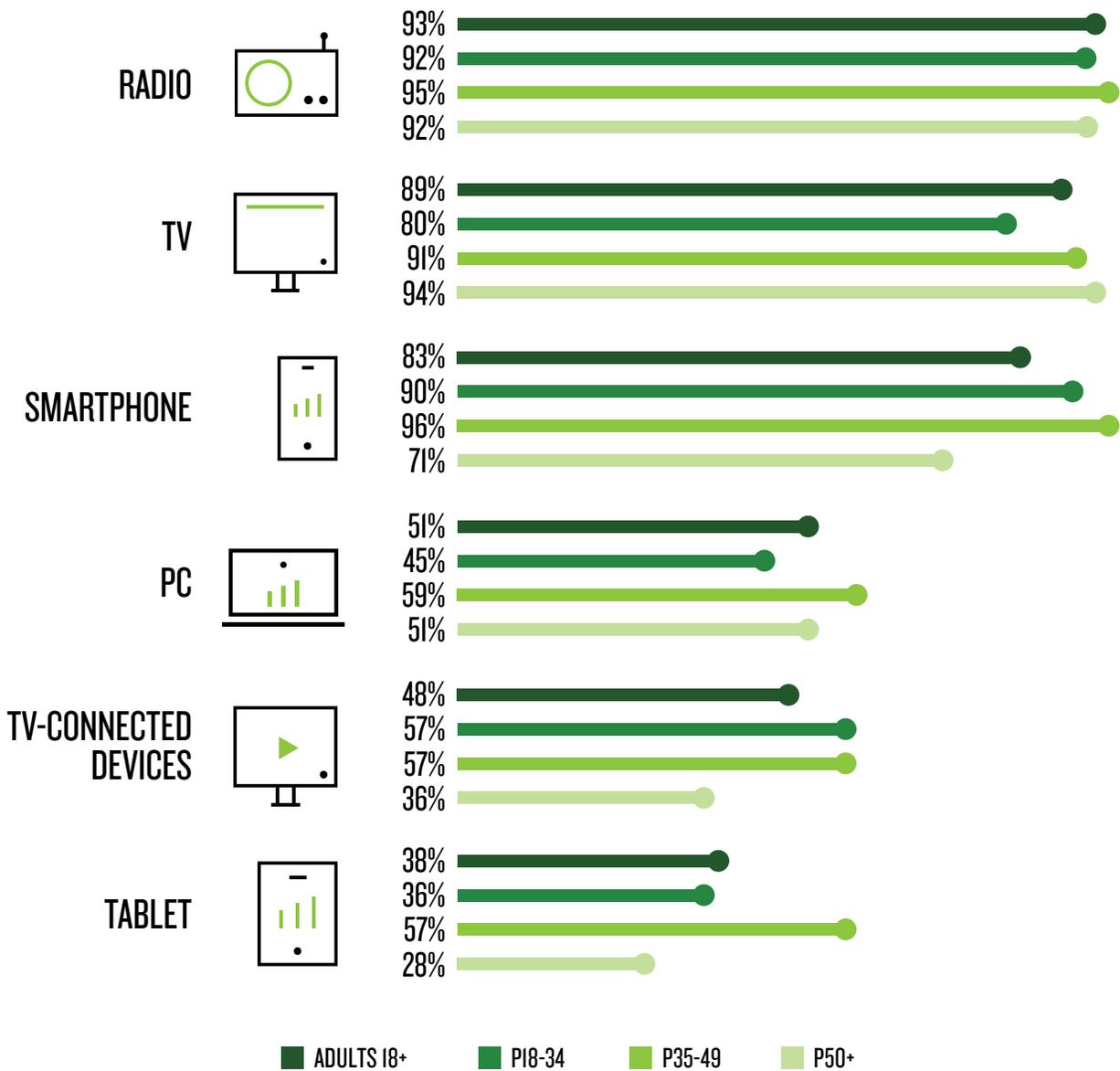
A golden age of audio means that Americans of all ages have easy access to music, information and entertainment – more than 271 million of us (aged 6 and older) are using radio this year.

In this *Audio Today* report we turn our focus to network radio, the large catalogue of ubiquitous content that reaches radio listeners en masse. Powered by dozens of networks and syndicators which offer programming to thousands of stations each week, network radio truly offers something for everyone. More than 90% of all radio listeners nationwide tune to a network-affiliated station in a given week.



RADIO REACHES MORE AMERICANS EACH WEEK THAN ANY OTHER PLATFORM

WEEKLY REACH (% OF POPULATION)



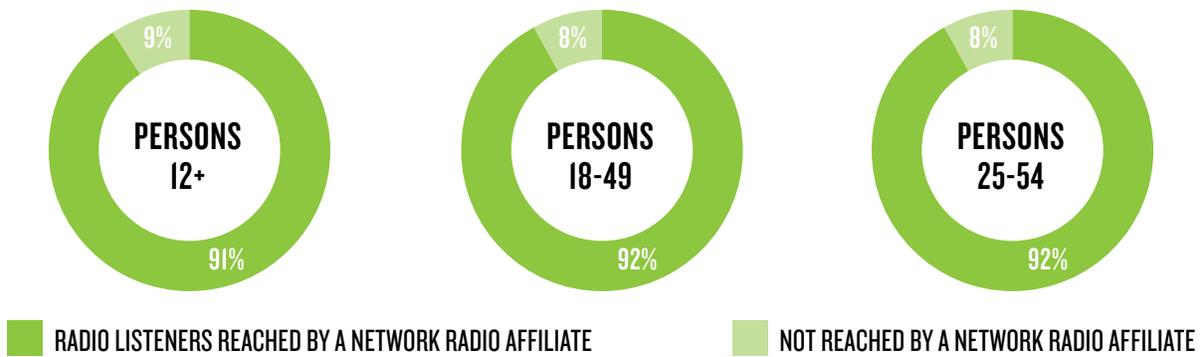
Source: Nielsen Comparable Metrics Report, Q1 2017. TV Connected Devices = DVD, Game Console, Multimedia Device, VCR.

NETWORK RADIO REACHES A WIDE VARIETY OF AMERICANS

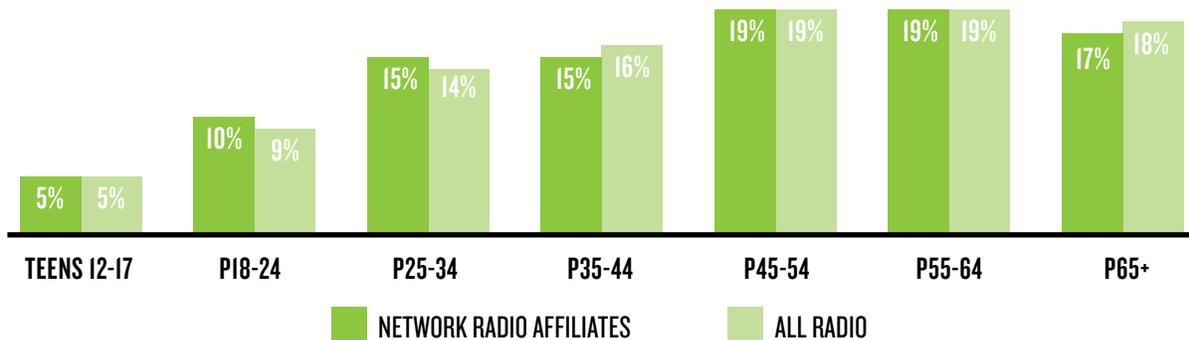
Network programming and services are radio's national currency: a large and diverse catalog of syndicated audio content which includes everything from 24-hour music channels to sports talk and political analysis, as well as some of the biggest personalities in radio.

The list of stations and affiliates that combine to represent the Network Radio audience is immense, and so is its audience.

MORE THAN 91% OF RADIO LISTENERS TUNE TO A NETWORK-AFFILIATED STATION EVERY WEEK



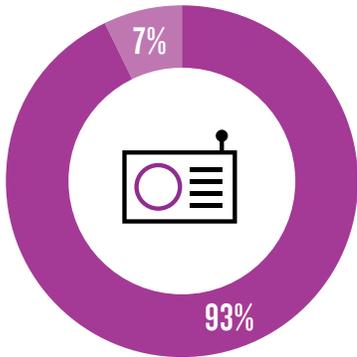
BECAUSE THE MAJORITY OF RADIO LISTENERS ARE ALSO REACHED BY NETWORK AFFILIATES, THE NETWORK AUDIENCE CLOSELY MIRRORS THE TOTAL RADIO AUDIENCE.



Source: Nielsen Audio National Regional Database (NRD), Spring 2017, Mon-Sun 5am-12mid, Weekly Cume, Composition Percents based on NW Total US PUR, NRRC Affiliate Lists dated August/September 2017

NETWORK LISTENERS

MILLENNIAL RADIO LISTENERS (18-34)



93% OF MILLENNIAL LISTENERS TUNE TO NETWORK-AFFILIATED STATIONS EACH WEEK

COMPOSITION OF P18-34 NETWORK AFFILIATE LISTENERS



HOUSEHOLD INCOME

\$75K+	32%
\$50K - \$75K	22%
\$25K - \$50K	28%
<\$25K	18%

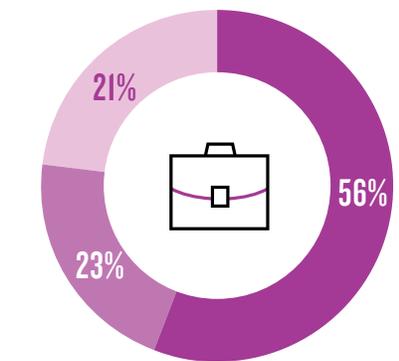
EDUCATION

COLLEGE GRAD	23%
SOME COLLEGE	35%
NO COLLEGE	42%

LISTENING LOCATION



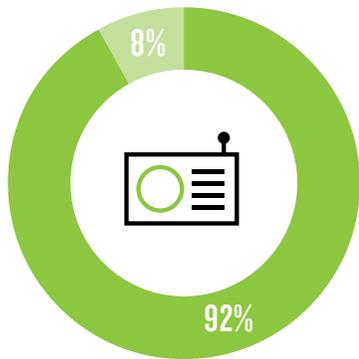
WORK



FULL-TIME **PART-TIME**
NOT EMPLOYED FULL- OR PART-TIME (INCL. RETIRED, STUDENT, ETC.)

Source: Source: Nielsen Audio National Regional Database (NRD), Spring 2017, Mon-Sun 5am-12mid

RADIO LISTENERS 18 TO 49



92% OF RADIO LISTENERS 18-49 TUNE TO NETWORK-AFFILIATED STATIONS EACH WEEK

COMPOSITION OF P18-49 NETWORK AFFILIATE LISTENERS



HOUSEHOLD INCOME

\$75K+	37%
\$50K - \$75K	22%
\$25K - \$50K	26%
<\$25K	15%

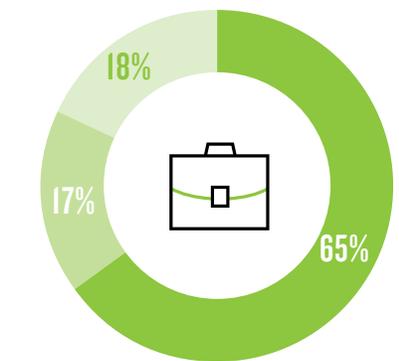
EDUCATION

COLLEGE GRAD	28%
SOME COLLEGE	34%
NO COLLEGE	38%

LISTENING LOCATION



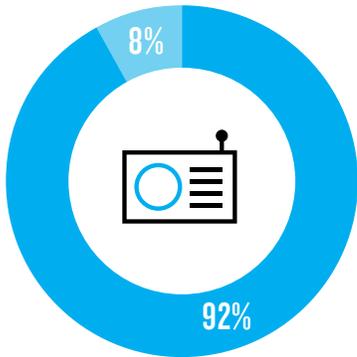
WORK



FULL-TIME **PART-TIME**
NOT EMPLOYED FULL- OR PART-TIME (INCL. RETIRED, STUDENT, ETC.)

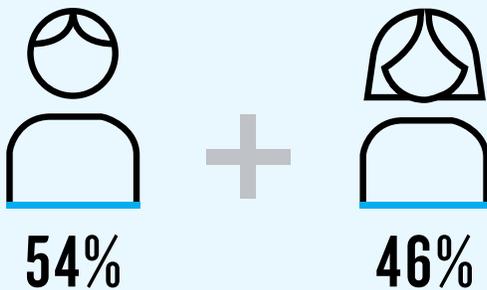
Source: Source: Nielsen Audio National Regional Database (NRD), Spring 2017, Mon-Sun 5am-12mid

25- TO 54-YEAR-OLD RADIO LISTENERS



92% OF RADIO LISTENERS 25-54 TUNE TO NETWORK-AFFILIATED STATIONS EACH WEEK

COMPOSITION OF P25-54 NETWORK AFFILIATE LISTENERS



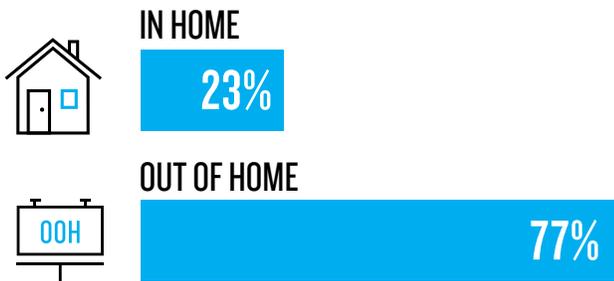
HOUSEHOLD INCOME

\$75K+	39%
\$50K - \$75K	22%
\$25K - \$50K	25%
<\$25K	14%

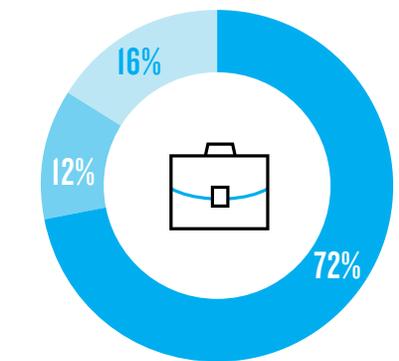
EDUCATION

COLLEGE GRAD	31%
SOME COLLEGE	33%
NO COLLEGE	36%

LISTENING LOCATION



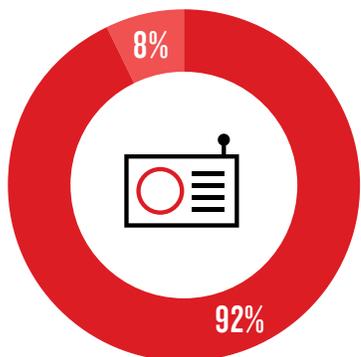
WORK



FULL-TIME **PART-TIME**
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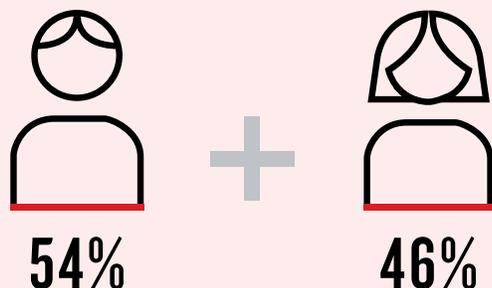
Source: Source: Nielsen Audio National Regional Database (NRD), Spring 2017, Mon-Sun 5am-12mid

35- TO 49-YEAR-OLD RADIO LISTENERS



92% OF RADIO LISTENERS 35-49 TUNE TO NETWORK-AFFILIATED STATIONS EACH WEEK

COMPOSITION OF P35-49 NETWORK AFFILIATE LISTENERS



HOUSEHOLD INCOME

\$75K+	42%
\$50K - \$75K	22%
\$25K - \$50K	23%
<\$25K	13%

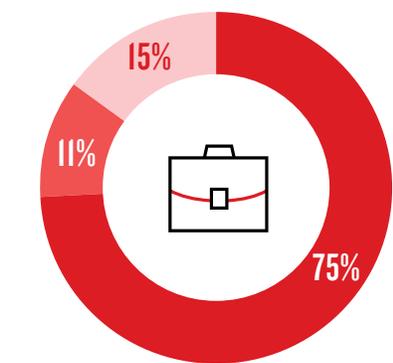
EDUCATION

COLLEGE GRAD	32%
SOME COLLEGE	33%
NO COLLEGE	35%

LISTENING LOCATION



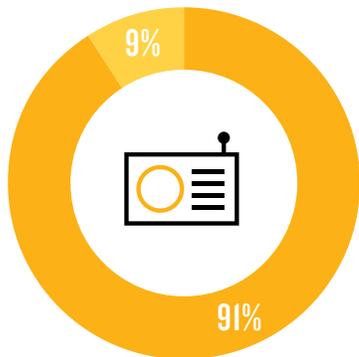
WORK



FULL-TIME **PART-TIME**
NOT EMPLOYED FULL- OR PART-TIME (INCL. RETIRED, STUDENT, ETC.)

Source: Source: Nielsen Audio National Regional Database (NRD), Spring 2017, Mon-Sun 5am-12mid

BOOMER RADIO LISTENERS (50-64)*



**91% OF BOOMER LISTENERS
TUNE TO NETWORK-AFFILIATED
STATIONS EACH WEEK**

COMPOSITION OF P50-64 NETWORK AFFILIATE LISTENERS



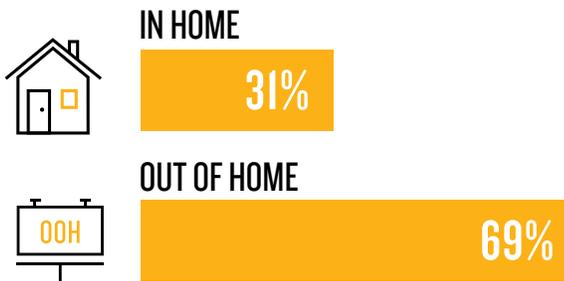
HOUSEHOLD INCOME

\$75K+	40%
\$50K - \$75K	23%
\$25K - \$50K	23%
<\$25K	15%

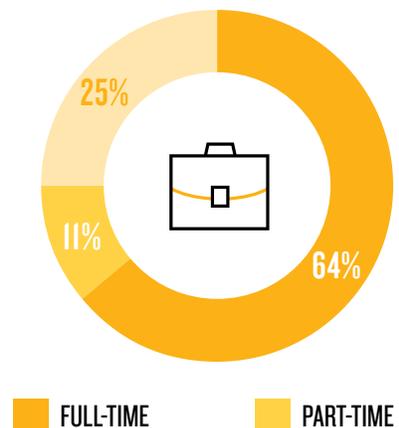
EDUCATION

COLLEGE GRAD	27%
SOME COLLEGE	35%
NO COLLEGE	38%

LISTENING LOCATION



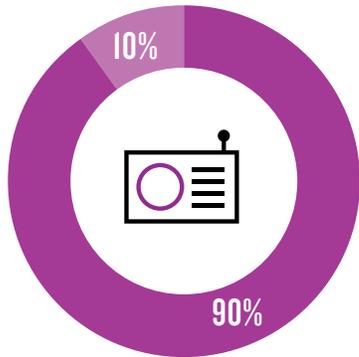
WORK



Source: Source: Nielsen Audio National Regional Database (NRD), Spring 2017, Mon-Sun 5am-12mid

*Commonly used definitions for Boomers are, as of 2014, those aged 49-67. Nielsen's age breaks stop at 64 or 74.

AGE 50 AND OLDER RADIO LISTENERS



90% OF RADIO LISTENERS 50+ TUNE TO NETWORK-AFFILIATED STATIONS EACH WEEK

COMPOSITION OF P50+ NETWORK AFFILIATE LISTENERS



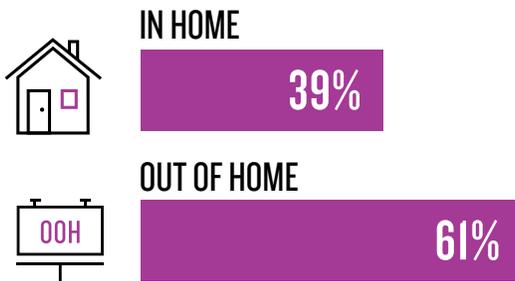
HOUSEHOLD INCOME

\$75K+	34%
\$50K - \$75K	22%
\$25K - \$50K	26%
<\$25K	18%

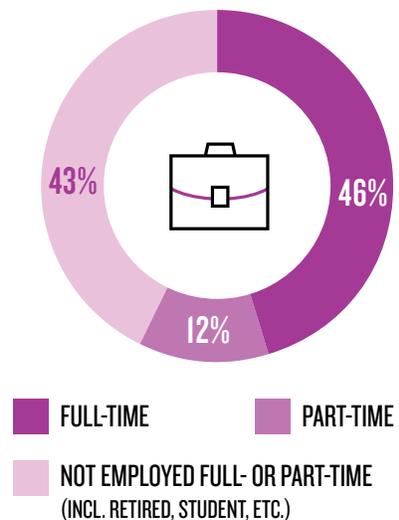
EDUCATION

COLLEGE GRAD	27%
SOME COLLEGE	34%
NO COLLEGE	39%

LISTENING LOCATION

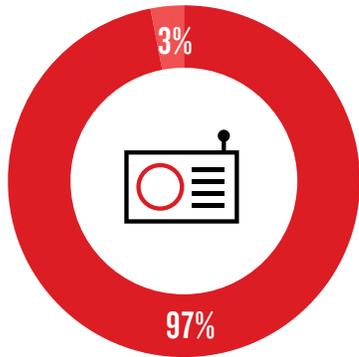


WORK



Source: Source: Nielsen Audio National Regional Database (NRD), Spring 2017, Mon-Sun 5am-12mid

BLACK (12+) RADIO LISTENERS



97% OF BLACK 12+ RADIO LISTENERS TUNE TO NETWORK-AFFILIATED STATIONS EACH WEEK

COMPOSITION OF BLACK NETWORK AFFILIATE LISTENERS



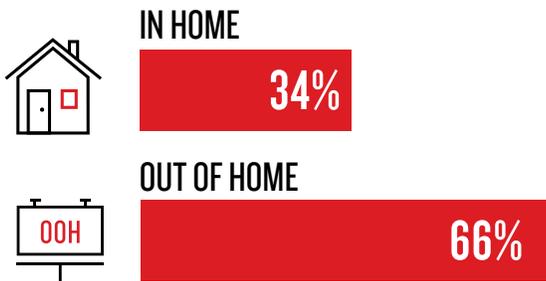
HOUSEHOLD INCOME

\$75K+	27%
\$50K - \$75K	19%
\$25K - \$50K	28%
<\$25K	26%

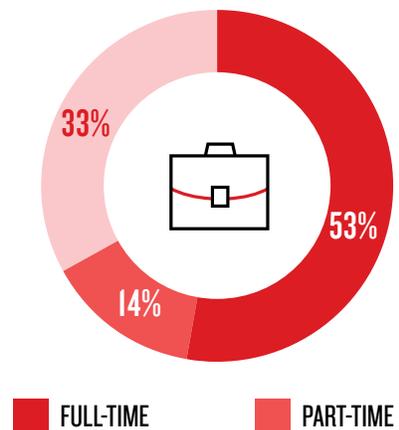
EDUCATION

COLLEGE GRAD	24%
SOME COLLEGE	36%
NO COLLEGE	41%

LISTENING LOCATION



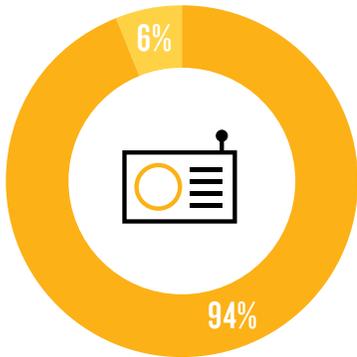
WORK



FULL-TIME **PART-TIME**
NOT EMPLOYED FULL- OR PART-TIME (INCL. RETIRED, STUDENT, ETC.)

Source: Source: Nielsen Audio National Regional Database (NRD), Spring 2017, Mon-Sun 5am-12mid
 Black Differential Survey Treatment Markets (129)

HISPANIC (12+) RADIO LISTENERS



94% OF HISPANIC RADIO LISTENERS TUNE TO NETWORK-AFFILIATED STATIONS EACH WEEK

COMPOSITION OF HISPANIC NETWORK AFFILIATE LISTENERS



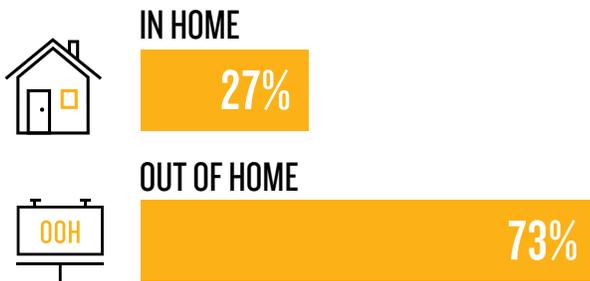
HOUSEHOLD INCOME

\$75K+	24%
\$50K - \$75K	21%
\$25K - \$50K	32%
<\$25K	23%

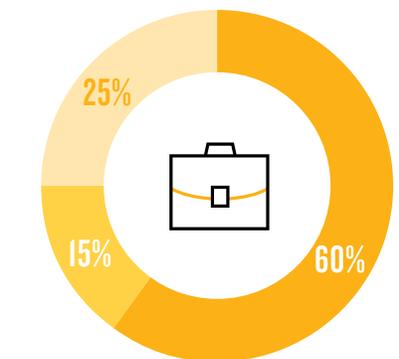
EDUCATION

COLLEGE GRAD	19%
SOME COLLEGE	30%
NO COLLEGE	51%

LISTENING LOCATION



WORK



FULL-TIME **PART-TIME**

NOT EMPLOYED FULL- OR PART-TIME (INCL. RETIRED, STUDENT, ETC.)

Source: Source: Nielsen Audio National Regional Database (NRD), Spring 2017, Mon-Sun 5am-12mid
Hispanic Differential Survey Treatment Markets (107)

SOURCING & METHODOLOGIES

SOURCING

Nielsen RADAR 133, June 2017

Nielsen National Regional Database, Spring 2017

Nielsen Comparable Metrics Report Q1 2017, including
Universe Estimates (UEs)

METHODOLOGIES

Affiliate lists for the 'network-affiliated' station groups used in this report are provided to Nielsen by the Network Radio Research Council. 9,184 stations were used to create this station group in the database.

Nielsen's Portable People Meter (PPM) technology surveys respondents in the top 48 radio metros in the United States as of the Spring 2017 survey.

Nielsen's Diary service surveys respondents in the remaining 220 radio metros in the United States as of the Spring 2017 survey.

Listening to HD broadcasts, internet streams of AM/FM stations and satellite radio is included in the Persons Using Radio estimates in this report, where the tuning meets our reporting and crediting requirements.

Data used in this report is inclusive of multicultural audiences. Hispanic consumer audiences are comprised of both English and Spanish speaking representative populations.

ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a global performance management company that provides a comprehensive understanding of what consumers watch and buy. Nielsen's Watch segment provides media and advertising clients with Nielsen Total Audience measurement services for all devices on which content — video, audio and text — is consumed. The Buy segment offers consumer packaged goods manufacturers and retailers the industry's only global view of retail performance measurement. By integrating information from its Watch and Buy segments and other data sources, Nielsen also provides its clients with analytics that help improve performance. Nielsen, an S&P 500 company, has operations in over 100 countries, covering more than 90% of the world's population. For more information, visit www.nielsen.com.





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