



SEPTEMBER 2017

STATE OF THE MEDIA: AUDIO TODAY 2017

A FOCUS ON BLACK & HISPANIC AUDIENCES

THE NATIONAL RADIO AUDIENCE CONTINUES TO DIVERSIFY

BLACK AND HISPANIC CONSUMERS MAKE UP A THIRD OF AMERICAN RADIO LISTENERS

Audio is everywhere these days in America – available on multiple platforms and devices from our smart cars to our smartphones, and reaching consumers across the spectrum in hundreds of markets around the country.

The radio audience in the United States is also a diverse group, reflective of our national population. Nearly 75 million weekly radio consumers are Black and Hispanic, a number that continues to grow.

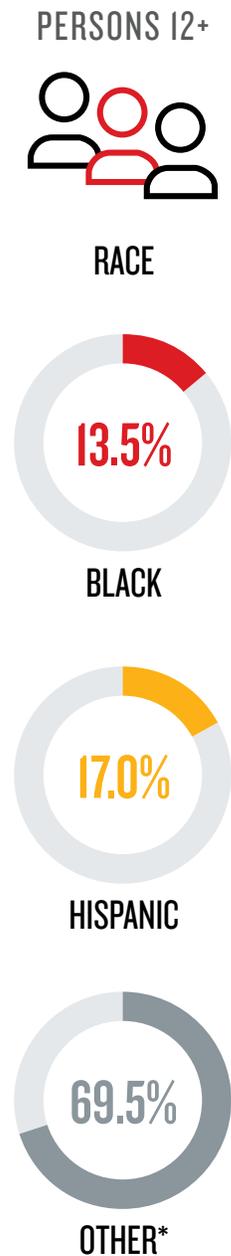
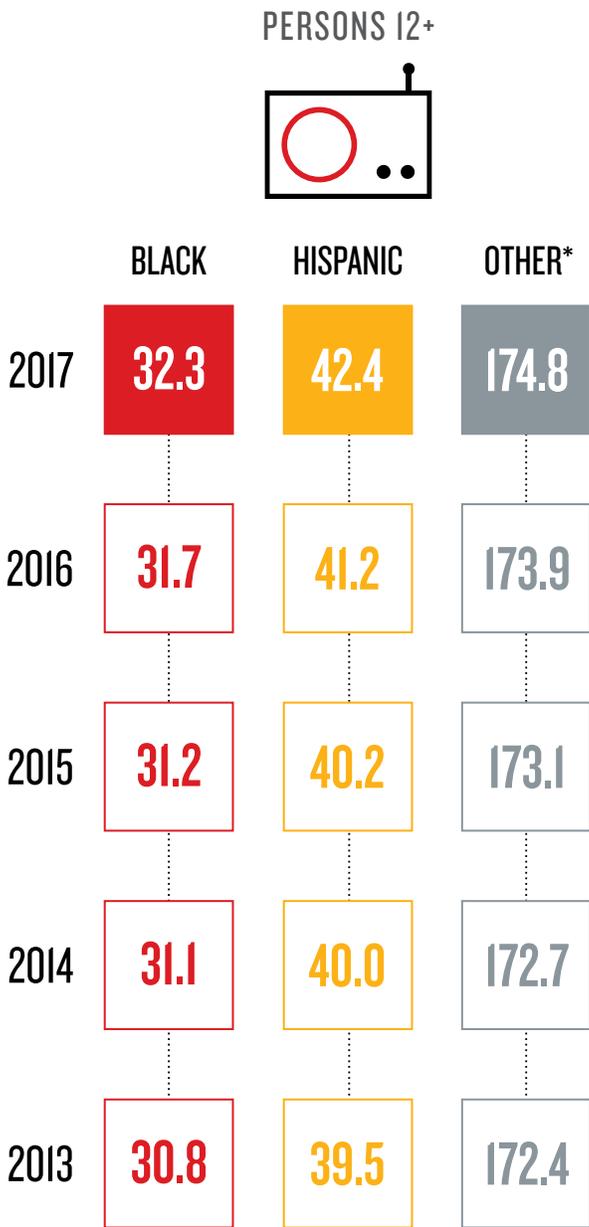
This quarter's *Audio Today* report profiles Black and Hispanic radio users, and finds that radio continues to be the top reach vehicle each week compared to other media. Overall, audio use is on the rise among these groups, particularly when it comes to streaming audio on the smartphone.



RADIO'S 5-YEAR GROWTH TREND

WEEKLY NATIONAL RADIO LISTENERS BY ETHNICITY, 2013-2017 (IN MILLIONS)

ETHNIC COMPOSITION OF THE NATIONAL RADIO AUDIENCE



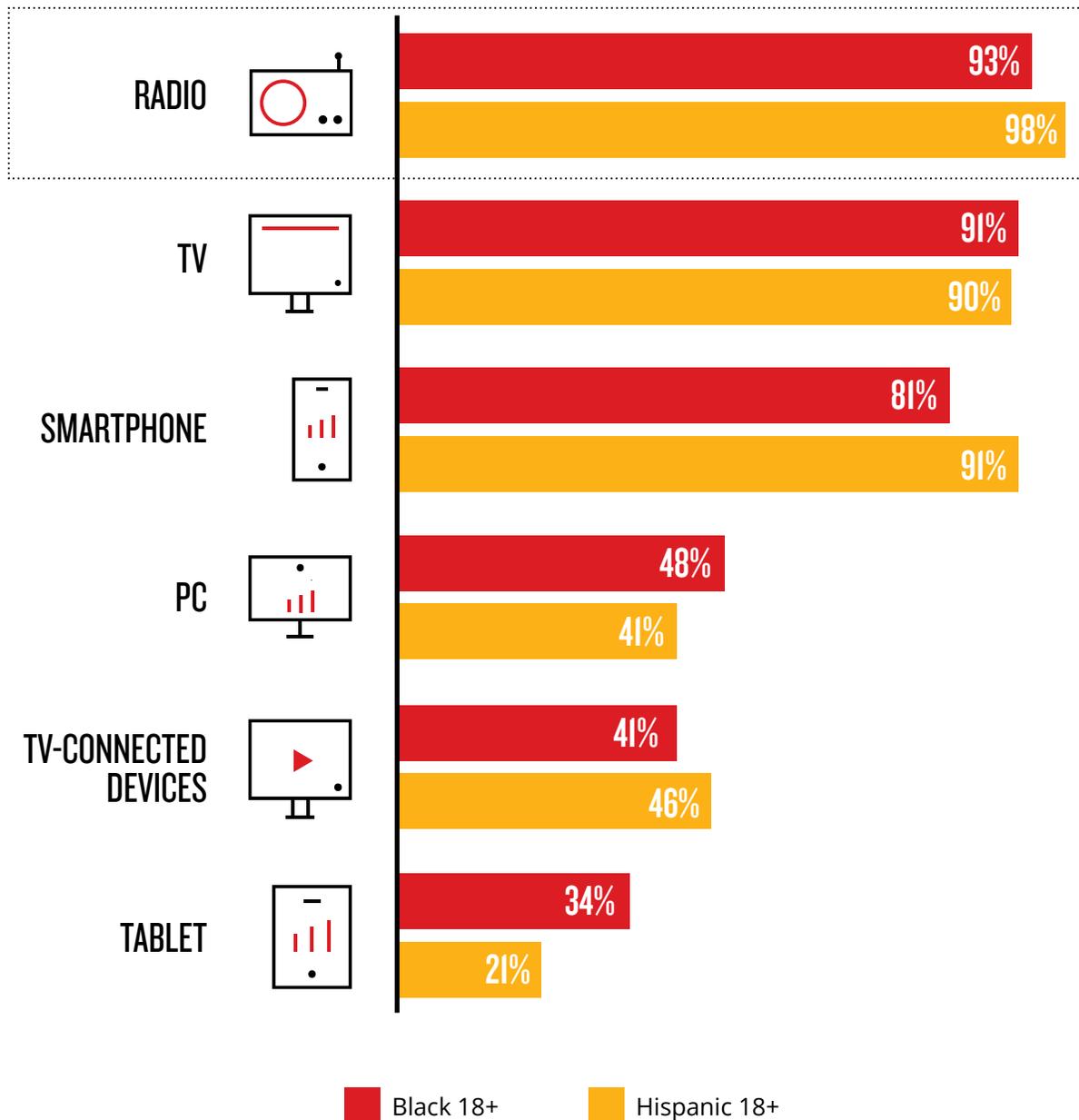
Source: RADAR 117 (June 2013), RADAR 121 (June 2014), RADAR 125 (June 2015), RADAR 129 (June 2016), RADAR 133 (June 2017)

Radio Usage; M-SU MID-MID

*Nielsen Audio defines 'Other' as all respondents who are not Black or Hispanic. Measurement includes Asian Americans, but cannot be separated from the total audience at this time.

RADIO IS THE LEADING REACH VEHICLE AMONG BLACKS & HISPANICS

WEEKLY REACH (% OF POPULATION)



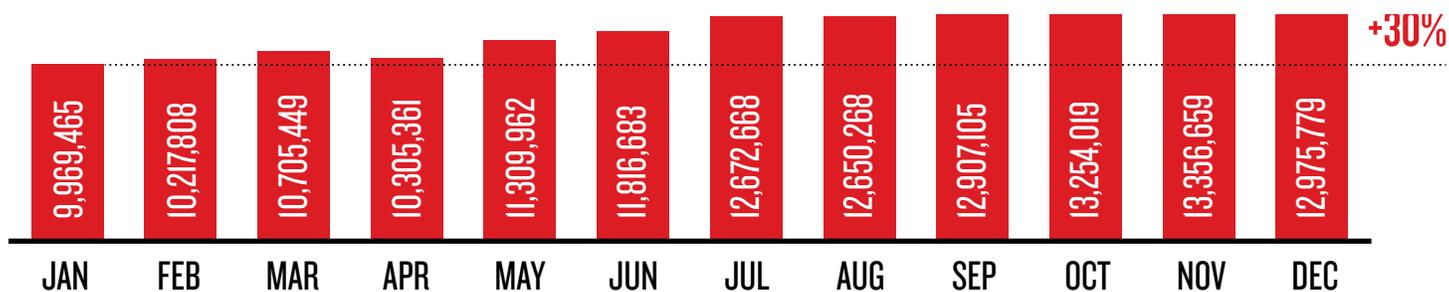
Source: Nielsen Comparable Metrics Report, Q4 2016. Based on Blacks and Hispanics 18+

SMARTPHONES DRIVE STREAMING AUDIO USAGE

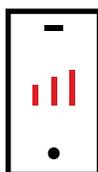
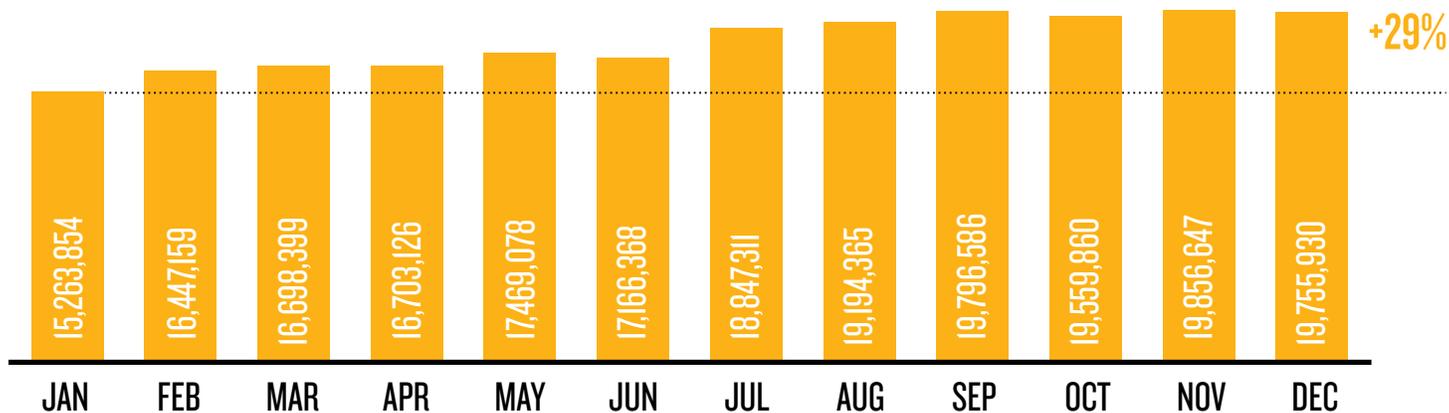
SMARTPHONE USE FOR STREAMING AUDIO



BLACK



HISPANIC



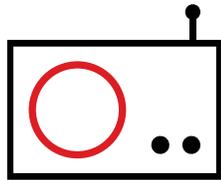
FROM JANUARY TO DECEMBER 2016, THE NUMBER OF BLACKS USING SMARTPHONES TO STREAM AUDIO JUMPED 30%. HISPANICS INCREASED 29%.

BLACK RADIO AUDIENCES



MORE THAN 30 MILLION BLACK AMERICANS TUNE TO RADIO WEEKLY

BLACKS (P12+)



32 MILLION*

BLACK AMERICANS USE RADIO EACH WEEK



48%



52%

COMPOSITION OF BLACK RADIO USERS



93%

OF ALL BLACK AMERICANS
REACHED WEEKLY
BY RADIO



13:58 (HH:MM)

SPENT WITH RADIO
EACH WEEK, MOST OF
ANY ETHNICITY



3PM-7PM
THE TOP DAYPART
IS PM DRIVE



**URBAN ADULT
CONTEMPORARY**
IS THE #1 FORMAT

LISTENING LOCATION



IN HOME

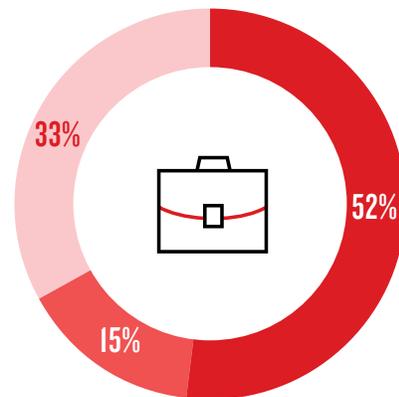
36%



OUT OF HOME

64%

WORK



Full-Time

Part-Time

Not Employed Full- or Part-Time
(incl. retired, student, etc.)

Source: RADAR 133, June 2017; M-SU 6AM-MID
Nielsen Audio National Regional Database, Fall 2016, M-SU 6AM-MID;
Black Differential Survey Treatment Markets (128)
Working data based on Blacks 18+
Nielsen Comparable Metrics Report Q4 2016
*RADAR methodology captures Black demographic information in all Nielsen
PPM and Diary markets, as well County Coverage survey areas.

BLACK LISTENERS

TOP FORMATS IN 2016

RANKED BY SHARE OF TOTAL LISTENING (%)



BLACKS 12+

Urban Adult Contemporary	28.5
Urban Contemporary	21.2
Rhythmic Contemporary Hit Radio	6.7
Pop Contemporary Hit Radio	5.5
News/Talk*	4.6

BLACKS 18-34

Urban Contemporary	34.2
Urban Adult Contemporary	18.4
Rhythmic Contemporary Hit Radio	10.2
Pop Contemporary Hit Radio	8.3
Adult Contemporary**	4.7

BLACKS 25-54

Urban Adult Contemporary	26.2
Urban Contemporary	25.5
Rhythmic Contemporary Hit Radio	7.9
Pop Contemporary Hit Radio	5.9
Adult Contemporary**	4.4

BLACKS 12-17

Urban Contemporary	32.3
Urban Adult Contemporary	20.1
Rhythmic Contemporary Hit Radio	11.4
Pop Contemporary Hit Radio	10.0
Adult Contemporary**	4.2

BLACKS 18-49

Urban Contemporary	29.1
Urban Adult Contemporary	22.6
Rhythmic Contemporary Hit Radio	8.9
Pop Contemporary Hit Radio	6.8
Adult Contemporary**	4.5

BLACKS 35-64

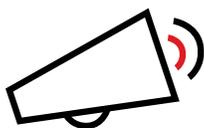
Urban Adult Contemporary	32.6
Urban Contemporary	17.8
Rhythmic Contemporary Hit Radio	5.8
News/Talk*	5.0
All Sports	4.5

Source: Nielsen Audio National Regional Database, Fall 2016, M-SU 6AM-MID; Hispanic Differential Survey Treatment Markets (109)

*News/Talk = News/Talk/Information + Talk/Personality

**Adult Contemporary = Adult Contemporary + Soft Adult Contemporary

TOP 20 ADVERTISERS ON URBAN & RHYTHMIC RADIO



2016 AD SPEND IN PPM MARKETS

MCDONALD'S	\$12,324,761
OPTIMA TAX RELIEF	\$8,790,127
T-MOBILE	\$8,615,415
COMCAST XFINITY	\$8,080,813
GEICO INSURANCE	\$7,676,571
VERIZON WIRELESS	\$6,660,623
METRO PCS	\$6,219,209
AT&T WIRELESS	\$6,179,644
CREDITREPAIR.COM	\$5,907,642
SPRINT	\$4,930,726
HOME DEPOT	\$4,824,300
BOOST MOBILE	\$4,793,674
MACY'S	\$4,755,399
COCA-COLA	\$4,653,706
MATTRESS FIRM	\$4,352,296
WALGREENS	\$4,166,476
JCPENNEY	\$4,019,320
BURGER KING	\$3,994,229
KROGER	\$3,953,711
FORTUNE BUILDERS WEBSITE	\$3,497,062

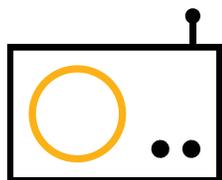
Source: Nielsen Ad Intel Jan 2016 – Dec 2016, Total Spend on 95 Urban or Rhythmic radio stations in PPM markets

HISPANIC RADIO AUDIENCES



NINETY-EIGHT PERCENT OF HISPANICS USE RADIO EACH WEEK

HISPANICS (P12+)



42 MILLION*

HISPANICS USE RADIO EACH WEEK



54%



46%

COMPOSITION OF HISPANIC RADIO USERS



98%

OF ALL HISPANICS REACHED WEEKLY BY RADIO



12:50 (HH:MM)

SPENT WITH RADIO EACH WEEK



10AM-3PM

THE TOP DAYPART IS MID DAY



MEXICAN REGIONAL

IS THE #1 FORMAT

LISTENING LOCATION



IN HOME

30%

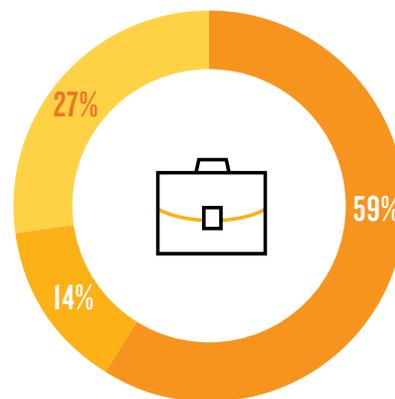


OUT OF HOME

70%

Source: RADAR 133, June 2017; M-SU 6AM-MID
 Nielsen Audio National Regional Database, Fall 2016, M-SU 6AM-MID;
 Hispanic Differential Survey Treatment Markets (109)
 Working data based on Hispanics 18+
 Nielsen Comparable Metrics Report Q4 2016
 *RADAR methodology captures Hispanic demographic information in all Nielsen PPM and Diary markets, as well County Coverage survey areas.

WORK



■ Full-Time ■ Part-Time
■ Not Employed Full- or Part-Time (incl. retired, student, etc.)

HISPANIC LISTENERS

TOP FORMATS IN 2016

RANKED BY SHARE OF TOTAL LISTENING (%)



HISPANICS 12+

Mexican Regional	16.5
Spanish Contemporary + Spanish Hot AC*	9.7
Pop Contemporary Hit Radio	8.7
Adult Contemporary**	6.8
Spanish Adult Hits	5.6

HISPANICS 18-34

Mexican Regional	16.8
Pop Contemporary Hit Radio	9.7
Rhythmic Contemporary Hit Radio	8.9
Spanish Contemporary + Spanish Hot AC*	8.8
Hot Adult Contemporary	5.8

HISPANICS 25-54

Mexican Regional	18.3
Spanish Contemporary + Spanish Hot AC*	10.0
Pop Contemporary Hit Radio	8.6
Adult Contemporary**	6.7
Spanish Adult Hits	5.6

ENGLISH DOMINANT HISPANICS 12+

Pop Contemporary Hit Radio	11.4
Rhythmic Contemporary Hit Radio	7.8
Adult Contemporary**	7.8
News/Talk***	6.8
Country****	6.4

HISPANICS 12-17

Pop Contemporary Hit Radio	17.2
Mexican Regional	14.0
Rhythmic Contemporary Hit Radio	11.6
Spanish Contemporary + Spanish Hot AC*	8.7
Hot Adult Contemporary	7.0

HISPANICS 18-49

Mexican Regional	18.2
Pop Contemporary Hit Radio	9.9
Spanish Contemporary + Spanish Hot AC*	9.5
Rhythmic Contemporary Hit Radio	6.5
Adult Contemporary**	6.3

HISPANICS 35-64

Mexican Regional	17.6
Spanish Contemporary + Spanish Hot AC*	9.9
Adult Contemporary**	7.6
Pop Contemporary Hit Radio	6.7
Spanish Adult Hits	6.5

SPANISH DOMINANT HISPANICS 12+

Mexican Regional	26.8
Spanish Contemporary + Spanish Hot AC*	15.2
Spanish Adult Hits	9.3
Pop Contemporary Hit Radio	6.1
Adult Contemporary**	5.9

Source: Nielsen Audio National Regional Database, Fall 2016, M-SU 6AM-MID; Hispanic Differential Survey Treatment Markets (109)

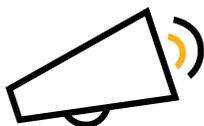
*AC = Adult Contemporary

**Adult Contemporary = Adult Contemporary + Soft Adult Contemporary

***News/Talk = News/Talk/Information + Talk/Personality

****Country = Country + New Country

TOP 20 ADVERTISERS ON MEXICAN REGIONAL & SPANISH RADIO



2016 AD SPEND IN PPM MARKETS

MCDONALD'S	\$8,646,126
O'REILLY AUTO PARTS	\$7,427,152
T-MOBILE	\$6,775,545
SPRINT	\$6,525,925
JCPENNEY	\$6,416,831
AT&T WIRELESS	\$5,585,845
METRO PCS	\$5,525,233
CRICKET WIRELESS	\$5,479,585
AUTOZONE	\$5,301,056
MACY'S	\$4,925,011
ROSETTA STONE	\$4,690,747
HOME DEPOT	\$4,413,555
VERIZON WIRELESS	\$4,141,782
STATE FARM	\$4,020,962
COMMUNITY TAX RELIEF	\$3,887,321
HONDA DLR ASSN	\$3,746,865
TOYOTA DLR ASSN	\$3,732,120
WELLS FARGO	\$3,593,605
BOOST MOBILE WIRELESS	\$3,401,376
NISSAN	\$3,260,361

Source: Nielsen Ad Intel Jan 2016 – Dec 2016, Total Spend on 78 Mexican Regional or Spanish radio stations in PPM markets
Promotional Spots (Univision and Estrella TV) Excluded.

SOURCING & METHODOLOGIES

SOURCING

Nielsen RADAR 117, June 2013

Nielsen RADAR 121, June 2014

Nielsen RADAR 125, June 2015

Nielsen RADAR 129, June 2016

Nielsen RADAR 133, June 2017

Nielsen National Regional Database, Fall 2016

Nielsen Comparable Metrics Report Q4 2016, including
Universe Estimates (UEs)

Nielsen Ad Intel Jan 2016-Dec 2016. 41 PPM markets measured. Excluded markets: Austin, Memphis, Jacksonville, Greensboro-Winston Salem-High Point, Norfolk-Virginia Beach-Newport News, Hartford-New Britain-Middletown, Riverside-San Bernardino

METHODOLOGIES

Format definitions are supplied to Nielsen by U.S. government-licensed radio stations, their internet streams and HD Radio services, regardless of their status as Nielsen clients.

Only stations licensed in the United States are included in Audio Today.

Nielsen's Portable People Meter (PPM) technology surveys respondents in the top 48 radio metros in the United States as of the Fall 2015 survey.

Nielsen's Diary service surveys respondents in the remaining 226 radio metros in the United States as of the Fall 2015 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.



The background of the entire image is a vibrant red color with a series of smooth, undulating, wavy lines that create a sense of depth and movement, resembling a topographical map or a liquid surface.

nielsen
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