

nielsen

AN UNCOMMON SENSE
OF THE CONSUMER™

STATE OF THE MEDIA: AUDIO TODAY

**A FOCUS ON AFRICAN AMERICAN
& HISPANIC AUDIENCES**

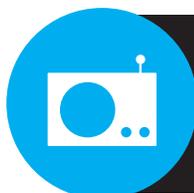
APRIL 2014



GROWTH AND THE AUDIO LANDSCAPE

NATIONAL AUDIENCE HITS ALL-TIME HIGH

Growth is a popular word today in America, whether you're talking about the stock market, entertainment choices, or census trends. Through it all, radio consumption continues to increase; nearly 92% of all Americans 12 or older are tuning to radio in an average week. That's 244.4 million of us, a record high!



244 MILLION AMERICANS
LISTEN TO RADIO EACH WEEK

This growth is remarkable considering the variety and number of media choices available to consumers today over-the-air and online via smartphones, tablets, notebooks/desktop computers and digital dashboards. Radio's hyper-local nature uniquely serves each market which keeps it tied strongly to our daily lives no matter how (or where) we tune in.

The radio landscape is also a diverse community of listeners from every corner of America, who reflect the same population trends of the country as a whole. Radio is one of the original mass mediums and as the U.S. population grows and the makeup of our citizens change, radio audiences follow suit.

Alongside the national growth headline, both African American and Hispanic audiences have also reached a historic high with more than 71 million tuning in each week.

Source: RADAR 120, March 2014, M-SU MID-MID, Total Listeners 12+/Hispanic 12+/African American 12+

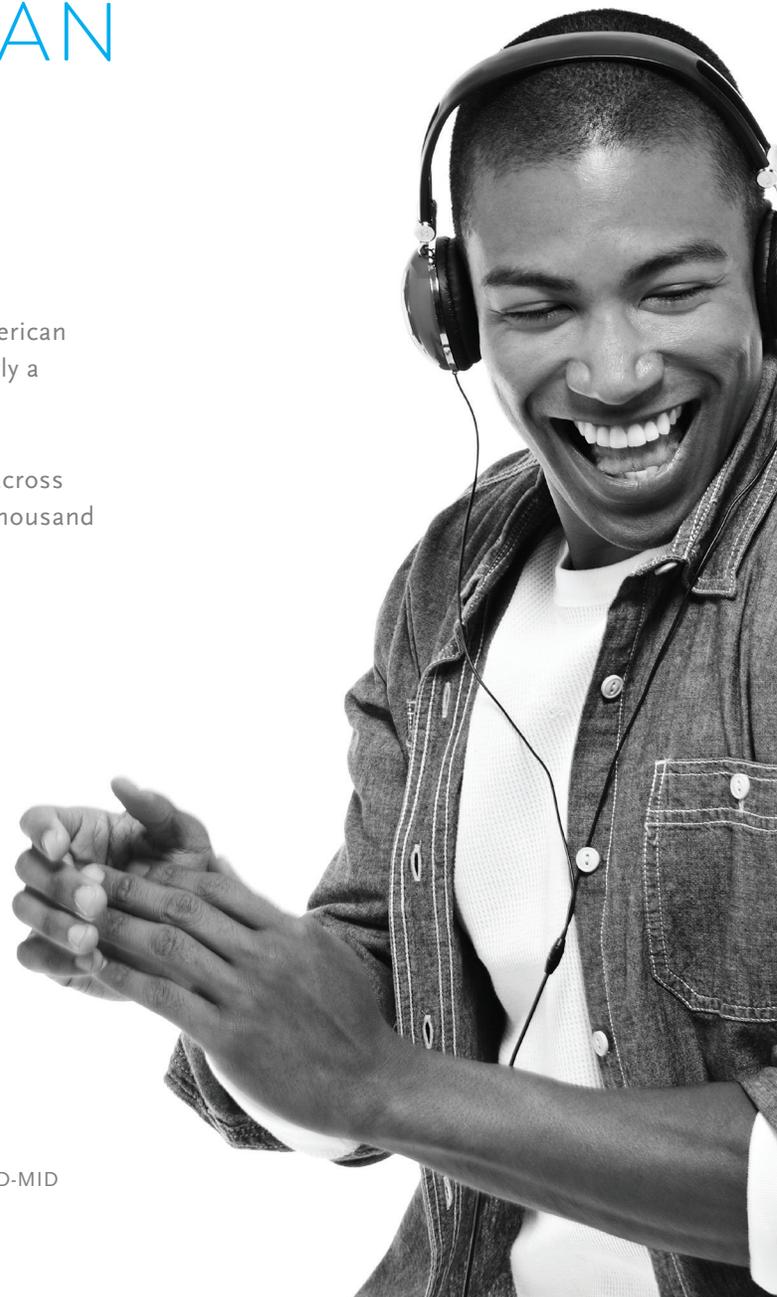
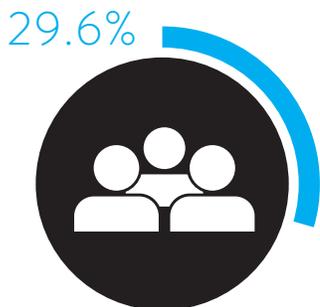
RADIO'S GROWTH CHART IS DIVERSIFIED

Weekly Cume (000)	March 2013	June 2013	Sept 2013	Dec 2013	March 2014
All Listeners 12+	243,177	242,876	242,530	242,186	244,457
Hispanic 12+	39,586	39,577	39,506	39,380	40,160
African American 12+	30,987	30,862	30,823	30,742	31,186

71 MILLION AFRICAN AMERICANS AND HISPANICS

The focus for this quarter's Audio Today report is the African American and Hispanic listener; combined these listeners account for nearly a third (29.6%) of the total national audience.

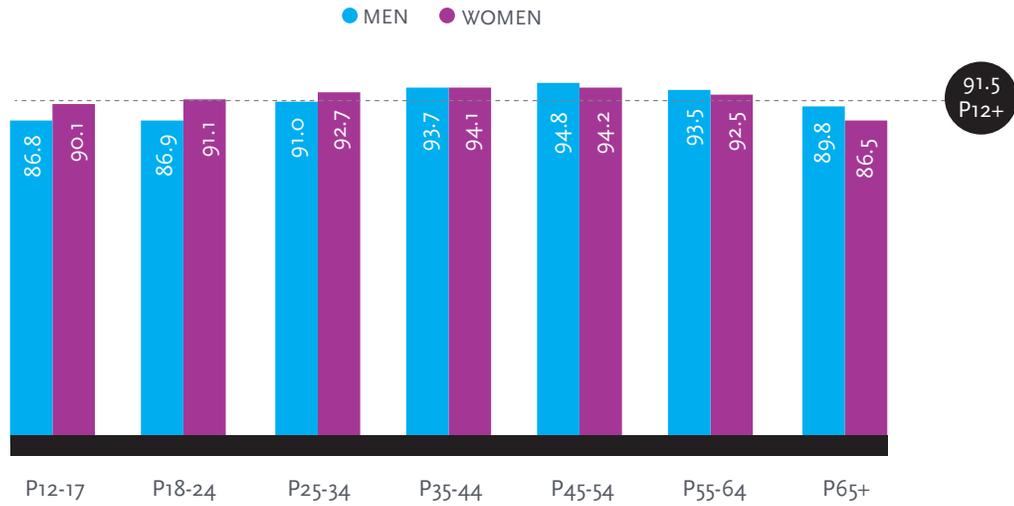
These multicultural audiences are highly engaged with radio all across the country, in markets large and small, where more than three thousand different stations program to them specifically.



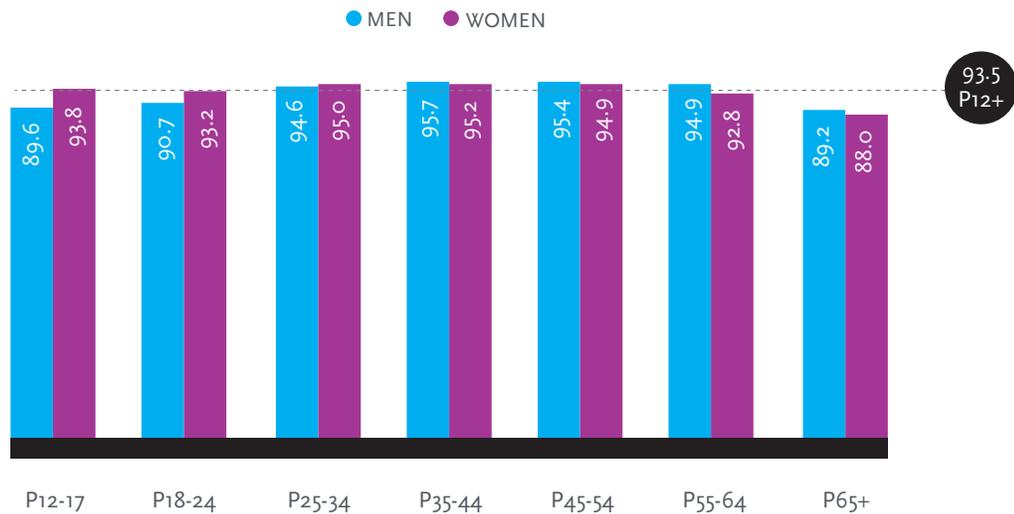
Source: RADAR 116-120, March 2013 through March 2014; Radio Usage; M-SU MID-MID

RADIO REACHES 90%+ OF NEARLY ALL DEMOGRAPHICS

AFRICAN AMERICAN WEEKLY CUME RATING LISTENERS 12+ (M-SU 6AM-MID)



HISPANIC WEEKLY CUME RATING LISTENERS 12+ (M-SU 6AM-MID)



HOW TO READ: These figures represent “Weekly Cume Ratings.” For example, more than 93% of Hispanic Women 18-24 in the United States tuned in to radio at least once during an average week, between the hours of 6AM and Midnight, Monday through Sunday. The dotted line represents the average of all African Americans or Hispanics (12+) who listen to radio at least once during the week.

Source: RADAR 120, March 2014; Radio Usage; M-SU 6AM-MID

HISPANICS (P12+)

MORE THAN 93% OF ALL HISPANICS USE RADIO EACH WEEK



40 MILLION*
HISPANICS USE RADIO EACH WEEK



53% 47%
COMPOSITION OF HISPANIC RADIO USERS



93.5%
OF ALL HISPANICS
REACHED WEEKLY
BY RADIO



12:13(HRS:MIN)
SPENT WITH RADIO
EACH WEEK



10AM-3PM
THE TOP DAYPART IS
MID DAY



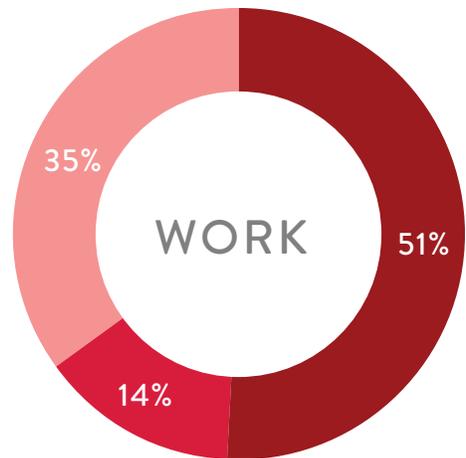
MEXICAN
REGIONAL
IS THE #1 FORMAT

LISTENING LOCATION



Source: RADAR 120, March 2014; M-SU 6AM-MID
Nielsen Audio National Regional Database, Fall 2013, M-SU 6AM-MID;
Hispanic Differential Survey Treatment Markets (102)

*RADAR methodology captures Hispanic demographic information in all
Nielsen PPM and Diary markets, as well County Coverage survey areas.



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

HISPANIC LISTENERS

TOP FORMATS IN 2013

RANKED BY SHARE OF TOTAL LISTENING (%)



HISPANICS 12+	
Mexican Regional	16.9
Pop Contemporary Hit Radio	9.2
Spanish Contemporary + Spanish Hot AC*	8.5
Rhythmic Contemporary Hit Radio	7.4
Adult Contemporary	6.8

HISPANICS 12-17	
Pop Contemporary Hit Radio	19.4
Rhythmic Contemporary Hit Radio	16.4
Mexican Regional	12.5
Adult Contemporary	6.9
Spanish Contemporary + Spanish Hot AC*	6.1

HISPANICS 18-34	
Mexican Regional	18.7
Pop Contemporary Hit Radio	12.1
Rhythmic Contemporary Hit Radio	11.6
Spanish Contemporary + Spanish Hot AC*	8.3
Adult Contemporary	5.9

HISPANICS 18-49	
Mexican Regional	19.1
Pop Contemporary Hit Radio	10.3
Spanish Contemporary + Spanish Hot AC*	8.5
Rhythmic Contemporary Hit Radio	8.4
Adult Contemporary	6.5

HISPANICS 25-54	
Mexican Regional	19.4
Spanish Contemporary + Spanish Hot AC*	8.8
Pop Contemporary Hit Radio	8.7
Spanish Adult Hits	6.9
Adult Contemporary	6.8

HISPANICS 35-64	
Mexican Regional	17.3
Spanish Contemporary + Spanish Hot AC*	8.7
Spanish Adult Hits	8.2
Adult Contemporary	7.5
Pop Contemporary Hit Radio	6.7

ENGLISH DOMINANT HISPANICS 12+	
Pop Contemporary Hit Radio	12.5
Rhythmic Contemporary Hit Radio	10.4
Adult Contemporary	8.3
Country	7.0
Hot Adult Contemporary	5.8

SPANISH DOMINANT HISPANICS 12+	
Mexican Regional	27.0
Spanish Contemporary + Spanish Hot AC*	12.7
Spanish Adult Hits	10.4
Pop Contemporary Hit Radio	6.3
Adult Contemporary	5.4

Source: Nielsen Audio National Regional Database, Fall 2013, M-SU 6AM-MID; Hispanic Differential Survey Treatment Markets (102)

*AC = Adult Contemporary

AFRICAN AMERICANS (P12+)

MORE THAN 91% OF ALL AFRICAN AMERICANS USE RADIO EVERY WEEK



31 MILLION*
AFRICAN AMERICANS USE RADIO EACH WEEK



COMPOSITION OF AFRICAN AMERICAN RADIO USERS



91.5%
OF ALL AFRICAN AMERICANS REACHED WEEKLY BY RADIO



12:10 (HRS: MINS)
SPENT WITH RADIO EACH WEEK



10AM-3PM
THE TOP DAYPART IS MID DAY



URBAN ADULT CONTEMPORARY IS THE #1 FORMAT

LISTENING LOCATION



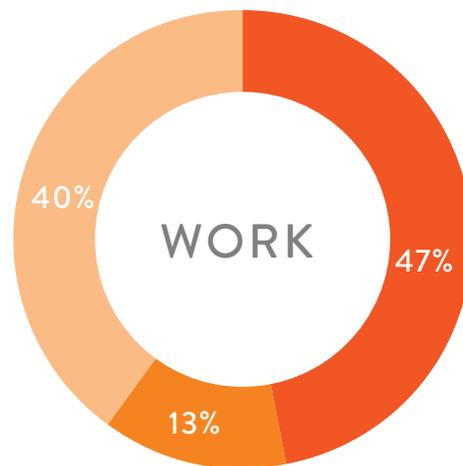
IN HOME

39%



OUT OF HOME

61%



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

Source: RADAR 120, March 2014; M-SU 6AM-MID Nielsen Audio National Regional Database, Fall 2013, M-SU 6AM-MID; Black Differential Survey Treatment Markets (129)

*RADAR methodology captures African American demographic information in all Nielsen PPM and Diary markets, as well County Coverage survey areas.

AFRICAN AMERICAN LISTENERS

TOP FORMATS IN 2013

RANKED BY SHARE OF TOTAL LISTENING (%)



AFRICAN AMERICANS 12+

Urban Adult Contemporary	31.5
Urban Contemporary	19.0
Rhythmic Contemporary Hit Radio	7.7
Adult Contemporary	4.7
Pop Contemporary Hit Radio	4.4

AFRICAN AMERICANS 12-17

Urban Contemporary	31.3
Urban Adult Contemporary	21.8
Rhythmic Contemporary Hit Radio	12.6
Pop Contemporary Hit Radio	8.6
Adult Contemporary	4.2

AFRICAN AMERICANS 18-24

Urban Contemporary	32.1
Urban Adult Contemporary	21.4
Rhythmic Contemporary Hit Radio	13.2
Pop Contemporary Hit Radio	6.8
Adult Contemporary	4.3

AFRICAN AMERICANS 18-49

Urban Adult Contemporary	27.4
Urban Contemporary	25.5
Rhythmic Contemporary Hit Radio	10.5
Pop Contemporary Hit Radio	5.6
Adult Contemporary	4.8

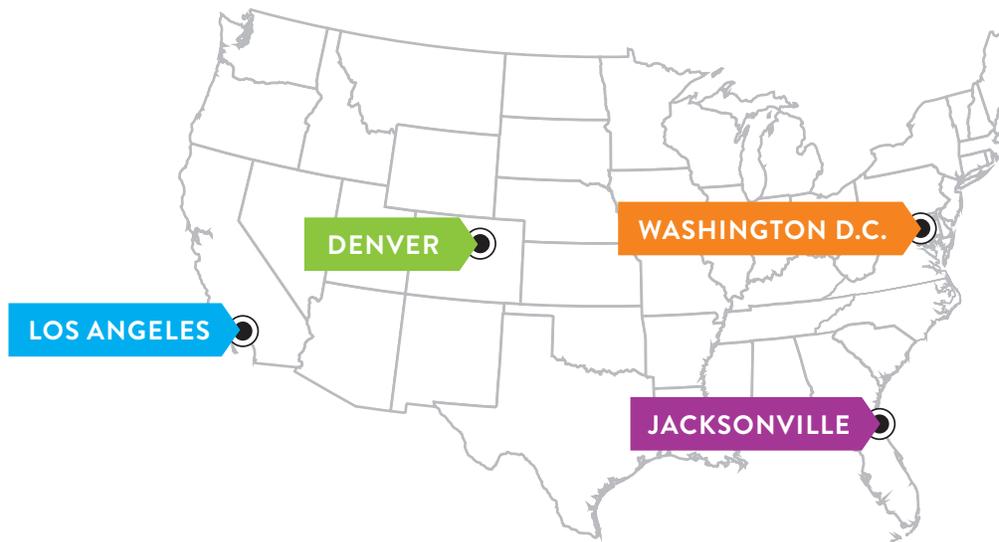
AFRICAN AMERICANS 25-54

Urban Adult Contemporary	31.3
Urban Contemporary	21.1
Rhythmic Contemporary Hit Radio	8.7
Adult Contemporary	5.0
Pop Contemporary Hit Radio	4.7

AFRICAN AMERICANS 35-64

Urban Adult Contemporary	36.7
Urban Contemporary	14.3
Rhythmic Contemporary Hit Radio	5.7
Adult Contemporary	5.1
Gospel	4.2

Source: Nielsen Audio National Regional Database, Fall 2013, M-SU 6AM-MID; Black Differential Survey Treatment Markets (129)



RADIO'S LOCAL FLAVOR

Radio's hyper-local nature means the choices and media habits of audiences in each market are unique. As we look around the country at cities with both established ethnic populations as well as those where the populations are growing, it's clear that African American and Hispanic radio listeners are influenced by the distinct content offerings in each local market as they make radio a part of their daily lives.

HISPANICS (P12+)

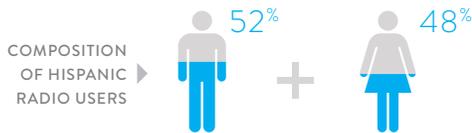
LOS ANGELES, CA
RANKED #1 FOR HISPANIC POPULATION

DENVER, CO
RANKED #15 FOR HISPANIC POPULATION

4.6 MILLION
HISPANICS IN LOS ANGELES
USE RADIO EACH WEEK



477 THOUSAND
HISPANICS IN DENVER
USE RADIO EACH WEEK



97%
OF ALL HISPANICS REACHED
WEEKLY BY RADIO

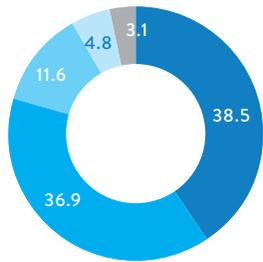


94.9%
OF ALL HISPANICS REACHED
WEEKLY BY RADIO

3PM-7PM
THE TOP DAYPART IS PM DRIVE

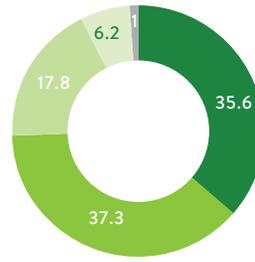
10AM-3PM
THE TOP DAYPART IS MIDDAY

*SHARE OF TOTAL HISPANIC LISTENING (%)



- SPANISH MUSIC
- GENERAL MARKET MUSIC
- URBAN FORMATS
- SPOKEN WORD
- SPANISH SPOKEN WORD

*SHARE OF TOTAL HISPANIC LISTENING (%)



- SPANISH MUSIC
- GENERAL MARKET MUSIC
- URBAN FORMATS
- SPOKEN WORD
- SPANISH SPOKEN WORD

FORMAT	WEEKLY TSL (HRS: MINS)
Spanish Music	7:15
General Market Music	5:15
Spoken Word	3:30
Spanish Spoken Word	3:00
Urban Formats	2:30

FORMAT	WEEKLY TSL (HRS: MINS)
Spanish Music	7:30
General Market Music	5:00
Urban Formats	3:15
Spoken Word	2:45
Spanish Spoken Word	2:30

Source: Nielsen Los Angeles Metro PPM data, Fall 2013, Hispanics 12+; M-SU 6A-MID
Nielsen Denver-Boulder Metro PPM data, Fall 2013, Hispanics 12+; M-SU 6A-MID

*Not all stations/formats in the market are included here, therefore shares may not add to 100.

AFRICAN AMERICANS (P12+)

WASHINGTON, DC

RANKED #4 FOR
AFRICAN AMERICAN POPULATION

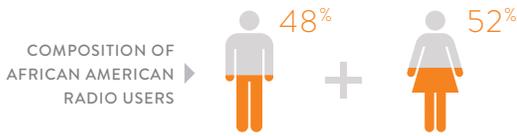
1.1 MILLION
AFRICAN AMERICANS IN
WASHINGTON USE RADIO EACH WEEK



JACKSONVILLE, FL

RANKED #26 FOR
AFRICAN AMERICAN POPULATION

228 THOUSAND
AFRICAN AMERICANS IN
JACKSONVILLE USE RADIO EACH WEEK



93.5%
OF ALL AFRICAN AMERICANS
REACHED WEEKLY BY RADIO



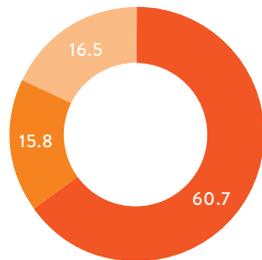
91.7%
OF ALL AFRICAN AMERICANS
REACHED WEEKLY BY RADIO

3PM-7PM
THE TOP DAYPART IS PM DRIVE



3PM-7PM
THE TOP DAYPART IS PM DRIVE

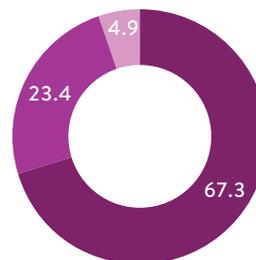
*SHARE OF TOTAL
AFRICAN AMERICAN
LISTENING (%)



- URBAN FORMATS
- GENERAL MARKET MUSIC
- SPOKEN WORD

FORMAT	WEEKLY TSL (HRS: MINS)
Urban	7:30
Spoken Word	5:15
General Market Music	3:15

*SHARE OF TOTAL
AFRICAN AMERICAN
LISTENING (%)



- URBAN FORMATS
- GENERAL MARKET MUSIC
- SPOKEN WORD

FORMAT	WEEKLY TSL (HRS: MINS)
Urban	8:15
General Market Music	4:30
Spoken Word	3:15

Source: Nielsen Washington, DC Metro PPM data, Fall 2013, African Americans 12+; M-SU 6A-MID
Nielsen Jacksonville Metro PPM data, Fall 2013, African Americans 12+; M-SU 6A-MID

*Not all stations/formats in the market are included here, therefore shares may not add to 100.

TOP 25

AFRICAN AMERICAN & HISPANIC MARKETS

MARKET	Metro 12+ Population	Hispanic 12+ Population
Los Angeles	11,179,600	4,803,400
New York	16,033,100	3,802,300
Miami-Ft. Lauderdale-Hollywood	3,858,000	1,891,600
Houston-Galveston	5,253,500	1,801,500
Chicago	7,910,200	1,591,500
Dallas-Ft. Worth	5,559,300	1,487,600
San Francisco	6,377,900	1,446,000
Riverside-San Bernardino	1,997,700	1,003,400
San Antonio	1,897,800	991,900
Phoenix	3,347,700	927,300
McAllen-Brownsville-Harlingen	975,500	862,600
San Diego	2,729,200	849,600
Washington, DC	4,720,300	672,900
El Paso	681,400	534,600
Denver-Boulder	2,486,500	503,500
Austin	1,586,300	476,300
Las Vegas	1,700,200	474,800
Orlando	1,676,600	474,600
Atlanta	4,487,600	461,500
San Jose	1,574,200	406,500
Tampa-St. Petersburg-Clearwater	2,501,200	398,800
Nassau-Suffolk (Long Island)	2,454,700	395,600
Boston	4,145,900	393,600
Fresno	777,200	379,600
Sacramento	1,913,000	360,100

MARKET	Metro 12+ Population	Black 12+ Population
New York	16,033,100	2,724,700
Atlanta	4,487,600	1,469,100
Chicago	7,910,200	1,357,900
Washington, DC	4,720,300	1,262,600
Philadelphia	4,547,300	923,300
Houston-Galveston	5,253,500	888,000
Dallas-Ft. Worth	5,559,300	844,000
Detroit	3,790,400	839,400
Los Angeles	11,179,600	798,100
Miami-Ft. Lauderdale-Hollywood	3,858,000	776,000
Baltimore	2,373,000	679,600
Memphis	1,122,600	500,000
Charlotte-Gastonia-Rock Hill	2,108,900	466,000
San Francisco	6,377,900	451,400
Norfolk-Virginia Beach-Newport News	1,390,200	431,500
St. Louis	2,318,800	425,300
New Orleans	1,222,200	383,600
Cleveland	1,763,800	348,900
Raleigh-Durham	1,430,100	321,700
Richmond	1,003,700	299,700
Tampa-St. Petersburg-Clearwater	2,501,200	299,600
Boston	4,145,900	298,800
Greensboro-Winston-Salem-High Point	1,239,100	273,900
Orlando	1,676,600	270,400
Birmingham	908,100	264,400

Source: Source: Nielsen Audio Fall 2013 Metro Market Rankings and Populations. For more please visit www.nielsen.com/audio

SOURCING & METHODOLOGIES

GLOSSARY

WEEKLY CUME PERSONS: The total weekly number of different persons who tune to radio for at least five minutes during the given daypart.

WEEKLY CUME RATING: The cume Persons audience expressed as a percentage of all persons estimated to be in the specified demographic group listening to a particular radio station or format.

TSL: Time Spent Listening. The amount of time (expressed in hours and minutes) the average listener spends with a particular station or format during the selected daypart. It can be defined on both a Daily and Weekly basis.

AQH SHARE: The Average Quarter-Hour audience expressed as a percentage of the total radio-listening population for the specified demographic group.

AQH COMPOSITION: The composition of the audience based on the Average Quarter-Hour persons estimate.

DIFFERENTIAL SURVEY TREATMENT (DST): A special procedure used to help maximise participation in the survey or panel by persons in a demographic group with a history of under-representation in survey research.

SOURCING

Nielsen RADAR 116, March 2013
 Nielsen RADAR 117, June 2013
 Nielsen RADAR 118, September 2013
 Nielsen RADAR 119, December 2013
 Nielsen RADAR 120, March 2014
 Nielsen National Regional Database, Fall 2013
 Nielsen Metro PPM Data, Fall 2013

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 2013 survey.

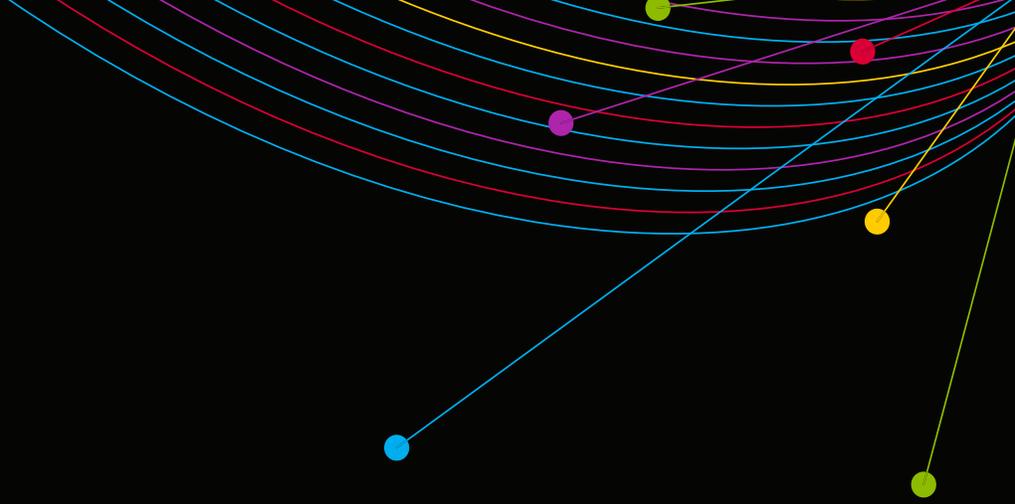
Nielsen's Diary service surveys respondents in the remaining 217 radio metros in the United States as of the Fall 2013 survey.

ABOUT NIELSEN

Nielsen Holdings N.V. (NYSE: NLSN) is a global information and measurement company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence, mobile measurement. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA and Diemen, the Netherlands.

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