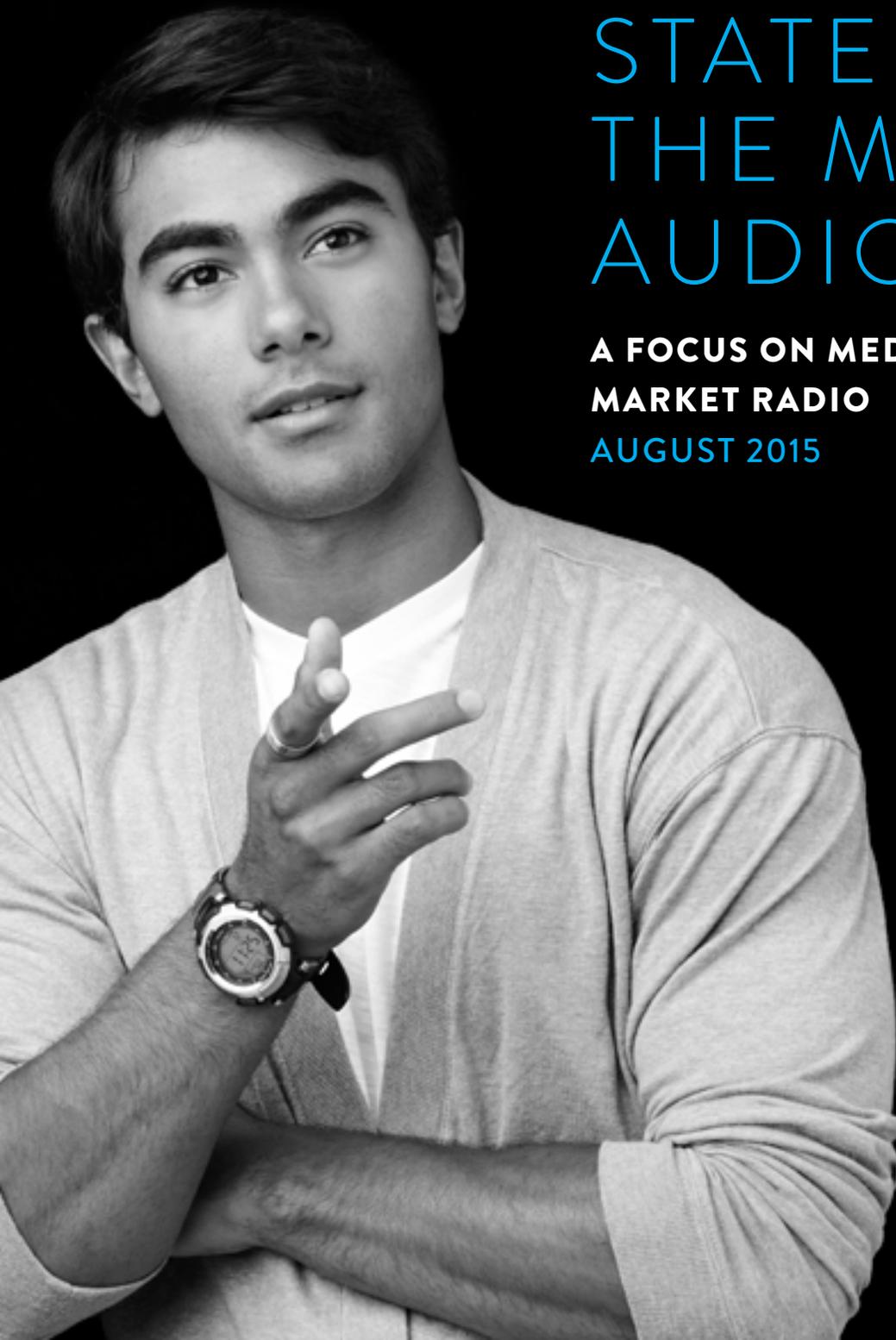


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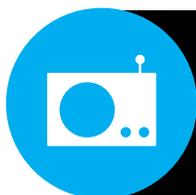
# STATE OF THE MEDIA: AUDIO TODAY

**A FOCUS ON MEDIUM & SMALL  
MARKET RADIO**  
AUGUST 2015

# RADIO HAS A LARGE IMPACT IN MEDIUM & SMALL MARKETS

## REACHING QUALIFIED CONSUMERS, EVERYWHERE

Radio's national scale reaches listeners in every corner of America, across more than 250 local markets large, medium and small. While the bigger cities grab most of the headlines, a big and qualified audience uses radio every day in medium and small markets. This special edition of the Audio Today report series focuses on the radio audience in 215 Nielsen Diary markets. There, more than 86% of consumers (age 12 or older) tune in during the week spending more than 15 hours of their media time with radio, the original mass medium.



65 MILLION CONSUMERS  
LISTEN TO MEDIUM & SMALL  
MARKET RADIO EACH WEEK

In the pages that follow, you'll find an in-depth profile of the medium and small market radio audience by age, gender and ethnicity. Did you know that Millennials make up the largest generation of radio users in medium and small markets? Or that 75% of radio listeners in those markets are in the work force and can be found outside the home when they are ready to buy? The power of radio in medium and small markets may surprise you.

## MEDIUM & SMALL MARKET RADIO REACHES **36 MILLION** QUALIFIED CONSUMERS WEEKLY

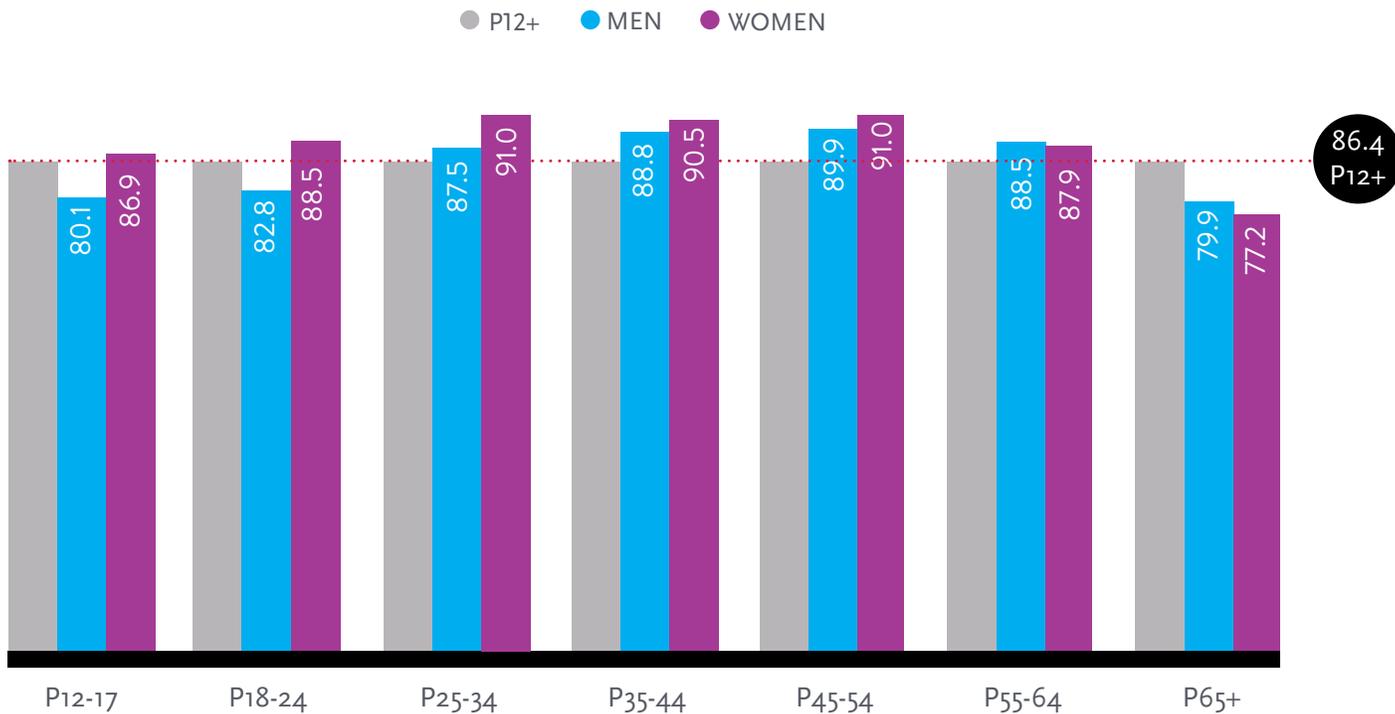
That's the power of radio - in every market: always on, always local...and always reaching valuable consumers.

Source: Nielsen National Regional Database, Fall 2014, M-SU MID-MID.

All non-PPM markets (215). Listeners 12+. Weekly Cume Persons (65,462,400), Weekly Cume Rating (86.6%), Weekly Time Spent Listening (15:30). Working data based on Adults 18-64.

# MEDIUM & SMALL MARKET RADIO REACHES NEARLY 90% OF KEY BUYING DEMOS

## WEEKLY CUME RATING IN MEDIUM & SMALL MARKETS LISTENERS 12+ (M-SU 6AM-MID)



### HOW TO READ:

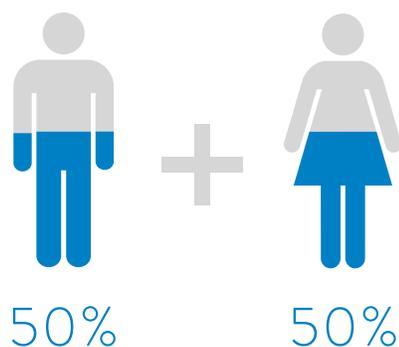
These figures represent “Weekly Cume Ratings.” For example, more than 90% of Women 35-44 in these markets tuned to radio at least once during an average week (between the hours of 6AM and Midnight, Monday-Sunday). The dotted line represents the average of all consumers in medium and small markets (12+) who listen to radio at least once during the week (86.4%).



Source: Nielsen National Regional Database, Fall 2014, M-SU 6AM-MID. All non-PPM markets (215).

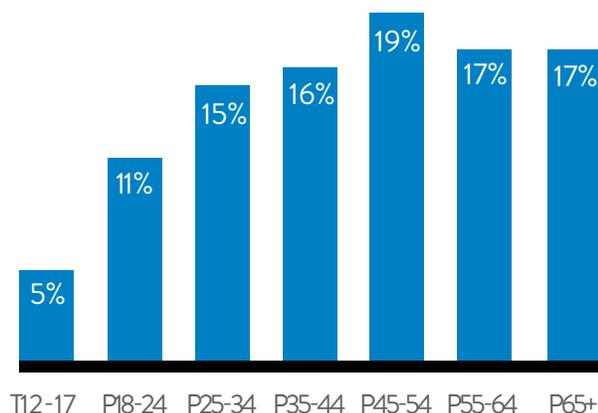
# WHO LISTENS IN MEDIUM & SMALL MARKETS?

Medium and small market radio listeners are evenly split when it comes to gender. From an age perspective, more than 60% are between the ages of 18 and 54, where most advertising is targeted.



## MEDIUM & SMALL MARKET RADIO AUDIENCE AGE COMPOSITION

LISTENERS 12+ (M-SU 6AM-MID)



Qualified consumers make up the majority of the medium and small market radio audience; working listeners account for three-quarters of all radio users, tuning in away from home and close to the point of purchase.

## MEDIUM & SMALL MARKET RADIO LISTENERS



FULL-TIME WORKERS **59%**



LISTENING OUT OF HOME **63%**



FULL OR PART-TIME WORKERS **75%**



LISTENERS WHO ATTENDED COLLEGE **61%**

Source: Nielsen National Regional Database, Fall 2014, M-SU 6AM-MID. All non-PPM markets (215). Working data based on Adults 18-64, education data based on Adults 18+.

## MILLENNIALS (P12-34)

24 MILLION OF AMERICA'S MOST CONNECTED CONSUMERS  
USE RADIO IN MEDIUM & SMALL MARKETS EACH WEEK



24.3 MILLION

MILLENNIALS USE MEDIUM & SMALL  
MARKET RADIO EACH WEEK



50%

50%

COMPOSITION OF MEDIUM & SMALL MARKET  
MILLENNIAL RADIO LISTENERS



86.5%

OF ALL MILLENNIALS  
REACHED WEEKLY  
IN MEDIUM & SMALL  
MARKETS



12 HRS, 30 MINS

SPENT WITH MEDIUM & SMALL  
MARKET RADIO EACH WEEK



3PM-7PM

THE TOP DAYPART  
IS PM DRIVE



COUNTRY

IS THE #1 FORMAT

### LISTENING LOCATION



AT WORK

21%



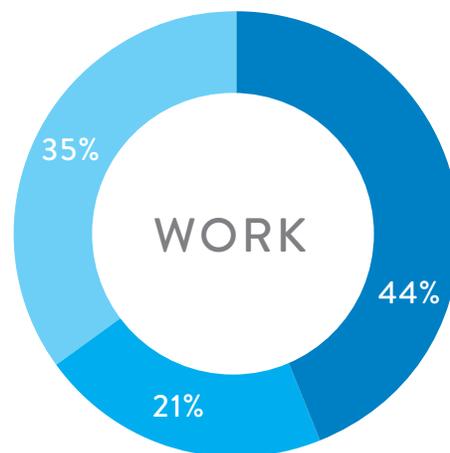
IN HOME

32%



IN CAR

44%



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

Source: Nielsen National Regional Database, Fall 2014, M-SU 6AM-MID.  
All non-PPM markets (215).  
Note: Location data will not sum to 100% because 'Other' is not shown.

## GENERATION X (P35-49)

MEDIUM & SMALL MARKET RADIO'S WORKFORCE  
68% OF GEN X LISTENERS WORK FULL-TIME



14.8 MILLION

GEN X'ERS USE MEDIUM & SMALL MARKET RADIO EACH WEEK



51%

49%

COMPOSITION OF MEDIUM & SMALL MARKET GEN X RADIO LISTENERS



89.9%

OF GENERATION X REACHED WEEKLY IN MEDIUM & SMALL MARKETS



16 HOURS

SPENT WITH MEDIUM & SMALL MARKET RADIO EACH WEEK



6AM-10AM

THE TOP DAYPART IS MORNING DRIVE



COUNTRY

IS THE #1 FORMAT

### LISTENING LOCATION



AT WORK

29%



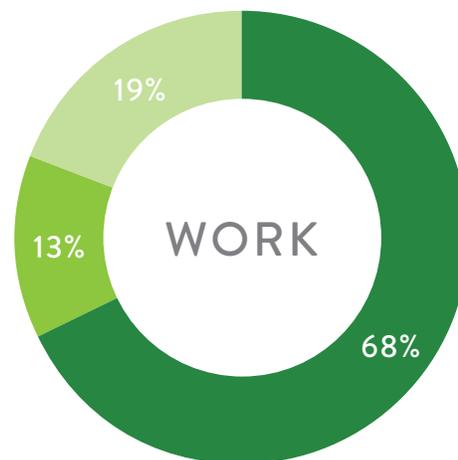
IN HOME

27%



IN CAR

43%



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

Source: Nielsen National Regional Database, Fall 2014, M-SU 6AM-MID. All non-PPM markets (215).  
Note: Location data will not sum to 100% because 'Other' is not shown.

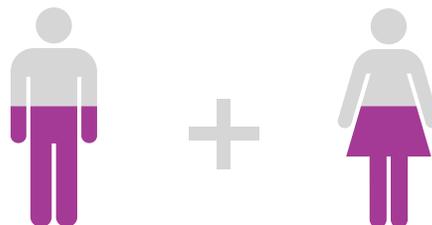
# BOOMERS (P50-74)

MEDIUM & SMALL MARKET RADIO'S MOST ENGAGED GENERATION  
OVER 16 1/2 HOURS OF TUNING EACH WEEK



22.5 MILLION

BOOMERS USE MEDIUM & SMALL MARKET RADIO EACH WEEK



50%

50%

COMPOSITION OF MEDIUM & SMALL MARKET BOOMER RADIO LISTENERS



86.8%

OF BOOMERS REACHED WEEKLY IN MEDIUM & SMALL MARKETS



16 HRS, 30 MINS

SPENT WITH MEDIUM & SMALL MARKET RADIO EACH WEEK (MOST OF ANY GENERATION)



10AM-3PM

THE TOP DAYPART IS MID DAY



NEWS/TALK

IS THE #1 FORMAT

## LISTENING LOCATION



AT WORK

18%



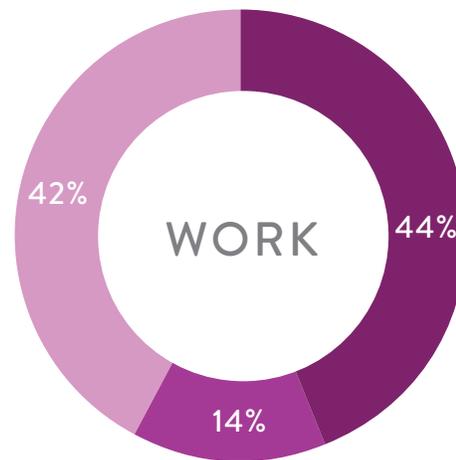
IN HOME

42%



IN CAR

38%



Source: Nielsen National Regional Database, Fall 2014, M-SU 6AM-MID. All non-PPM markets (215).  
Note: Location data will not sum to 100% because 'Other' is not shown.

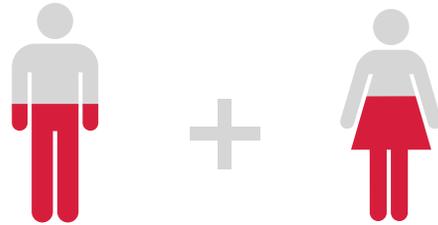
● FULL-TIME ● PART-TIME  
● NOT EMPLOYED FULL OR PART-TIME (INCL. RETIRED, STUDENT, ETC.)

# HISPANICS (P12+)

NEARLY 90% OF HISPANICS IN MEDIUM & SMALL MARKETS USE RADIO



**6.7 MILLION**  
HISPANICS USE MEDIUM &  
SMALL MARKET EACH WEEK



**49%**      **51%**  
COMPOSITION OF MEDIUM & SMALL MARKET  
HISPANIC RADIO LISTENERS



**88.4%**  
OF ALL HISPANICS  
REACHED WEEKLY  
IN MEDIUM & SMALL  
MARKETS



**16 HRS, 30 MINS**  
SPENT WITH MEDIUM &  
SMALL MARKET RADIO  
EACH WEEK

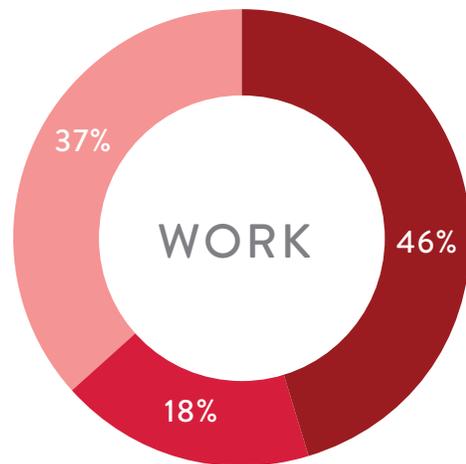


**6AM-10AM**  
THE TOP DAYPART IS  
MORNING DRIVE



**MEXICAN  
REGIONAL**  
IS THE #1 FORMAT

## LISTENING LOCATION



Source: Nielsen National Regional Database, Fall 2014, M-SU 6AM-MID.  
All non-PPM Hispanic Differential Survey Treatment markets (65).  
Working data based on Hispanics 18+.  
Note: Location data will not sum to 100% because 'Other' is not shown.

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

## BLACKS (P12+)

6 MILLION BLACK AMERICANS TUNE TO RADIO IN MEDIUM & SMALL MARKETS



6.0 MILLION

BLACK AMERICANS USE MEDIUM & SMALL MARKET RADIO EACH WEEK



45%

55%

COMPOSITION OF MEDIUM & SMALL MARKET BLACK RADIO LISTENERS



87.6%

OF ALL BLACK AMERICANS REACHED WEEKLY IN MEDIUM & SMALL MARKETS



17 HRS, 30 MINS

SPENT WITH MEDIUM & SMALL MARKET RADIO EACH WEEK (MOST OF ANY LISTENER GROUP)



6AM-10AM

THE TOP DAYPART IS MORNING DRIVE



URBAN ADULT CONTEMPORARY

IS THE #1 FORMAT

### LISTENING LOCATION



AT WORK

14%



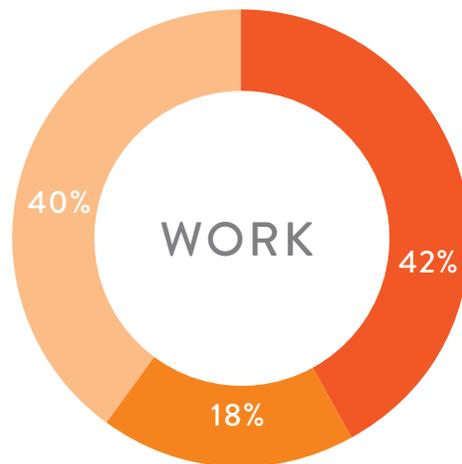
IN HOME

47%



IN CAR

36%

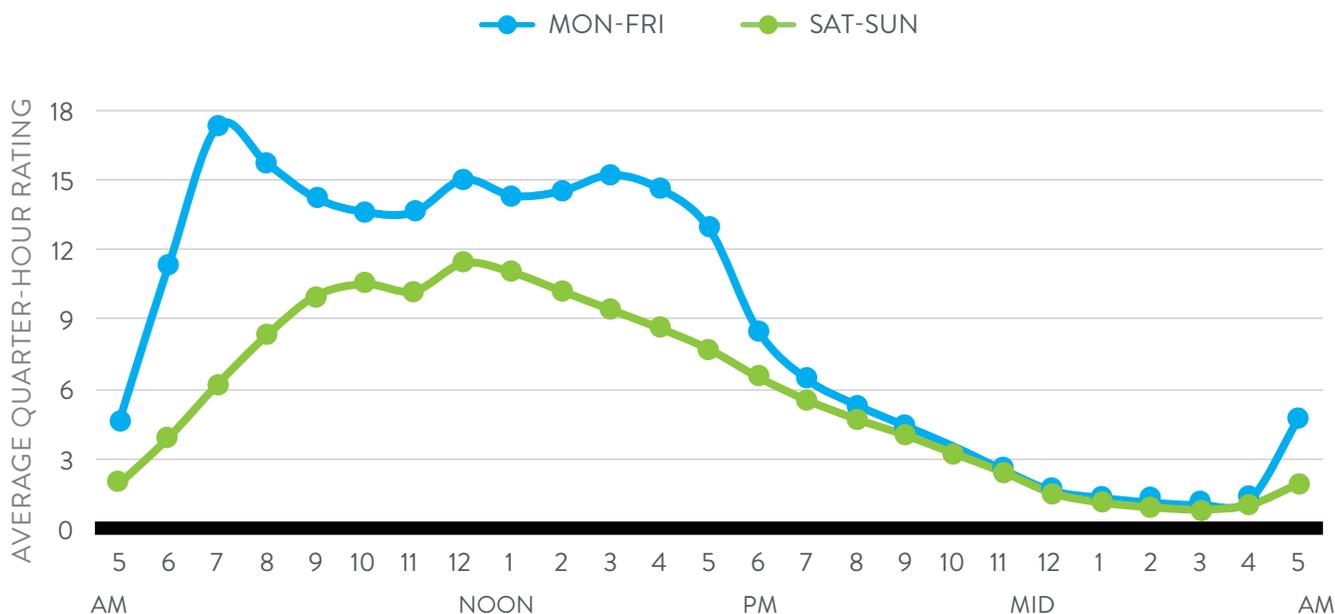


- FULL-TIME
- PART-TIME
- NOT EMPLOYED FULL OR PART-TIME (INCL. RETIRED, STUDENT, ETC.)

Source: Nielsen National Regional Database, Fall 2014, M-SU 6AM-MID. All non-PPM Black Differential Survey Treatment markets (83). Working data based on African Americans 18+. Note: Location data will not sum to 100% because 'Other' is not shown.

# MEDIUM & SMALL MARKET RADIO PEAKS WHEN MOST CONSUMERS SHOP AND BUY

**TOP-RATED HOURS**  
LISTENERS 12+ MON-FRI, SAT-SUN, TOTAL DAY AQH RATING



## TOP-RATED DAYPARTS

ALL DAYPARTS MON-FRI EXCEPT WHERE NOTED (AQH RATING)

DAYPART	P12+	P18-34	P18-49	P25-54
AM DRIVE (6AM-10AM)	14.6	12.6	14.9	16.9
MID DAY (10AM-3PM)	14.2	12.3	14.2	15.9
PM DRIVE (3PM-7PM)	12.8	12.4	13.6	14.6
EVENINGS (7PM-MID)	4.4	5.0	4.7	4.4
WEEKENDS (6AM-MID)	7.4	6.8	7.1	7.5

### HOW TO READ:

These figures represent “Average Quarter-Hour” Ratings for all major dayparts. For all listeners 12+, 6AM-10AM is the highest rated daypart during the week. During that time, in an average 15-minute period, 14.6% of all Americans in medium and small markets (12+) are tuning to radio.



**OVERALL, MORNING DRIVE (6AM-10AM) IS THE HIGHEST RATED DAYPART...**

...WHILE 7AM IS THE HIGHEST RATED HOUR DURING THE WEEKDAY FOR RADIO LISTENING

Source: Nielsen National Regional Database, Fall 2014, M-SU 6AM-MID.

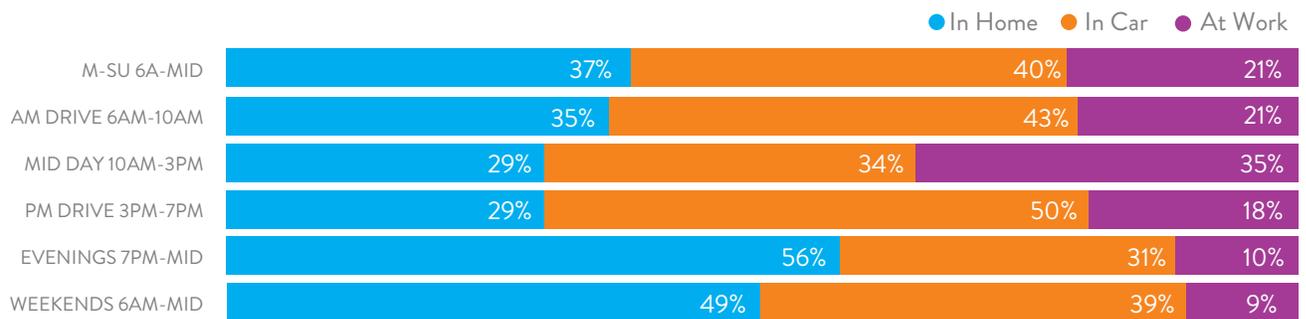
All non-PPM markets (215).

# MEDIUM & SMALL MARKET RADIO REACHES QUALIFIED CONSUMERS CLOSE TO THE POINT OF PURCHASE

A MAJORITY OF RADIO USAGE IN MEDIUM AND SMALL MARKETS COMES FROM THE EMPLOYED AUDIENCE, AWAY FROM HOME

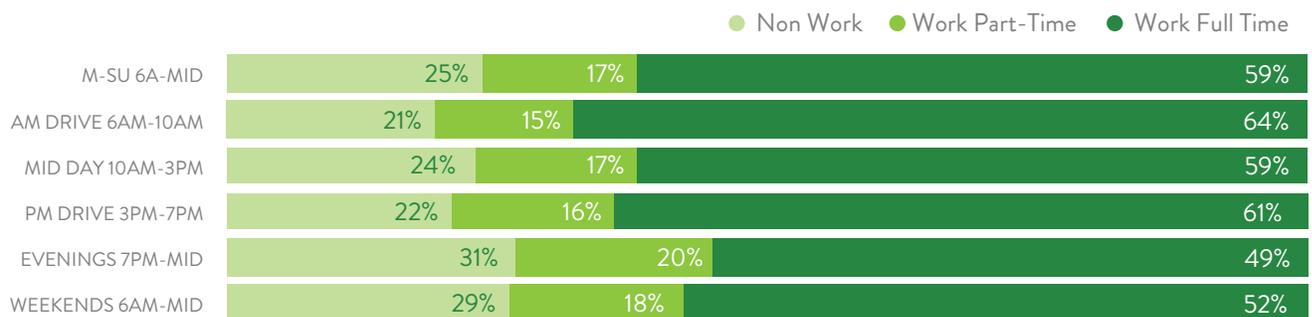
## LISTENING LOCATION BY DAYPART

LISTENERS 12+ AQH COMPOSITION

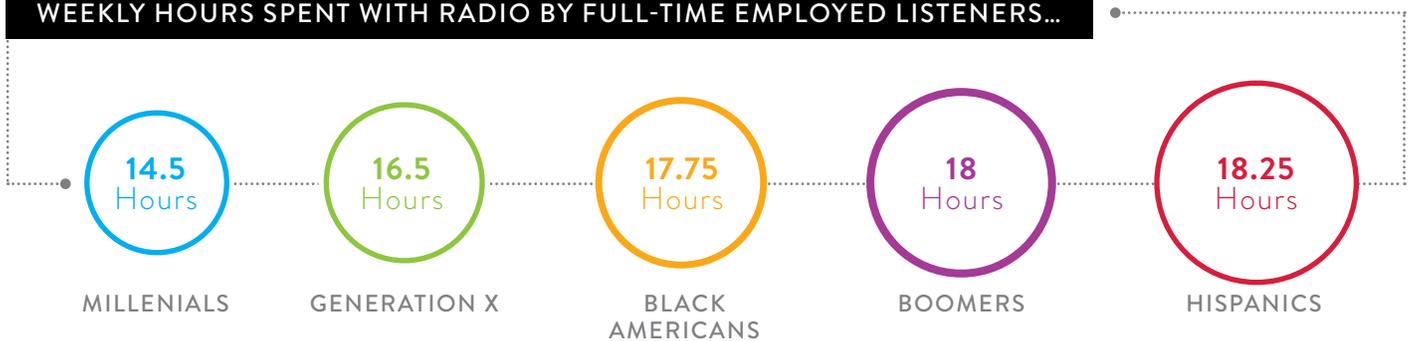


## WORKING STATUS BY DAYPART

LISTENERS 18-64 AQH COMPOSITION



## WEEKLY HOURS SPENT WITH RADIO BY FULL-TIME EMPLOYED LISTENERS...



Source: Nielsen National Regional Database, Fall 2014, M-SU 6AM-MID.

All non-PPM markets (215), including Black & Hispanic DST markets.

Note: Location data will not sum to 100% because 'Other' is not shown.

# MEDIUM & SMALL MARKET RADIO'S TOP FORMATS IN 2014

RANKED BY SHARE OF TOTAL LISTENING (%)



15.9	COUNTRY*	2.1	ALBUM ORIENTED ROCK (AOR) + MAINSTREAM ROCK
11.1	NEWS/TALK*	1.7	RELIGIOUS
8.6	POP CONTEMPORARY HIT RADIO (CHR)	1.6	CLASSICAL
7.2	ADULT CONTEMPORARY (AC)*	1.4	ADULT HITS + 80's HITS
5.4	CLASSIC ROCK	1.3	CLASSIC COUNTRY
5.4	CLASSIC HITS	1.2	OLDIES
4.2	CONTEMPORARY CHRISTIAN		
3.9	HOT ADULT CONTEMPORARY (AC)		
3.9	URBAN ADULT CONTEMPORARY (AC)		
3.7	RHYTHMIC CONTEMPORARY HIT RADIO (CHR)		
3.7	URBAN CONTEMPORARY		
2.9	ALL SPORTS		
2.6	ACTIVE ROCK		
2.1	MEXICAN REGIONAL		



Source: Nielsen National Regional Database, Fall 2014, M-SU 6AM-MID.

All non-PPM markets (215).

\*Country = Country + New Country

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

\*Adult Contemporary = Adult Contemporary + Soft Adult Contemporary

# 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 depending on the market.

**AQH PERSONS:** Average Quarter-Hour persons. The basic element of measurement for the ratings, based on the average number of listeners who tuned in for at least five minutes during a given 15-minute period. Also referred to as Persons Using Radio (PUR) in Nielsen Diary markets or Persons Using Measured Media (PUMM) for Nielsen PPM markets.

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

**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 maximize participation in the survey or panel by persons in a demographic group with a history of under-representation in survey research

## SOURCING

Nielsen National Regional Database, Fall 2014, M-SU 6AM-MID. All non-PPM markets (215).

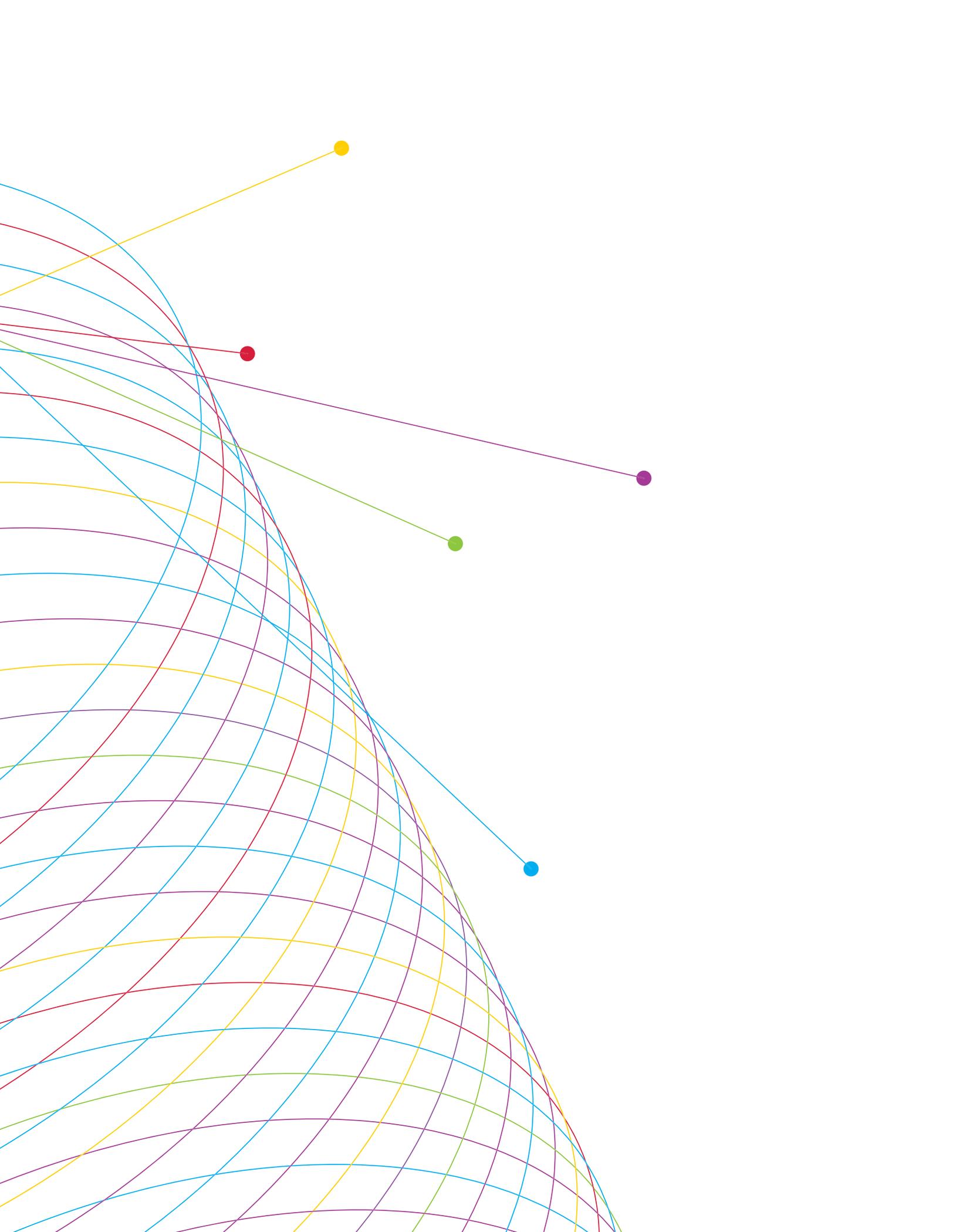
## METHODOLOGIES

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 Diary service surveys respondents in 215 radio metros in the United States as of the Fall 2014 survey. Those markets were used to compile the data for this report.

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

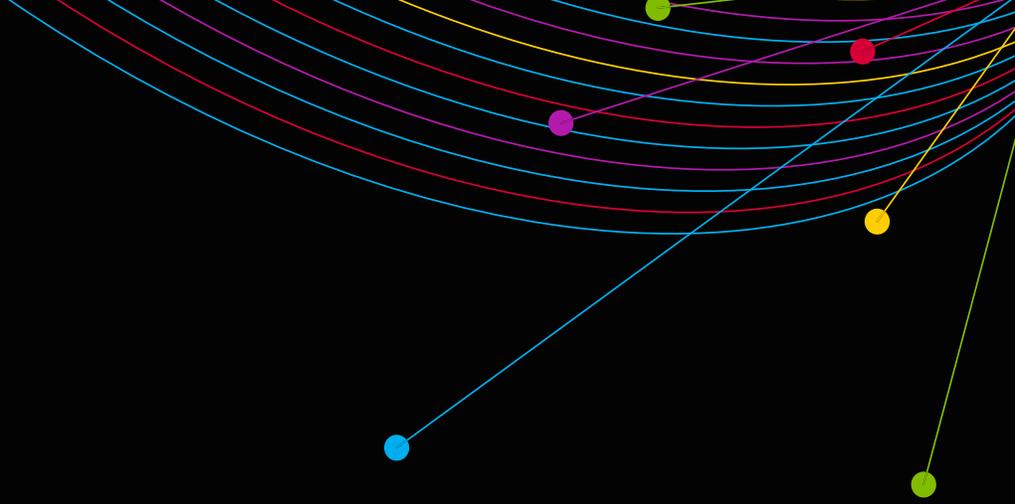


## ABOUT NIELSEN

Nielsen N.V. (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 Total Audience measurement services across all devices where 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 provides its clients with both world-class measurement as well as analytics that help improve performance. Nielsen, an S&P 500 company, has operations in over 100 countries that cover more than 90 percent of the world's population.

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