



JUNE 2017

STATE OF THE MEDIA: AUDIO TODAY 2017

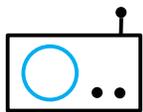
HOW AMERICA LISTENS



Brad Kelly,
Managing director
Nielsen audio

WELCOME

Let's give credit where it's due. Radio is remarkably resilient. When Nielsen entered the Audio measurement space, for the first time radio was stacked up against the competition -- and the results surprised a few people. Despite the countless media and entertainment options available today, AM/FM radio continues to be the top weekly reach medium.



271 MILLION AMERICANS 6+ LISTEN TO RADIO EACH WEEK*

Marketers and Brand Managers are rediscovering radio. It is a mass medium that can deliver targetability and message frequency in markets large and small. And as the audio pie continues to grow (Americans are carving out more and more time each day to listen), radio consumers tune in when and where it counts. Listening outside the home and, specifically, in the car is a huge part of the radio ecosystem. This gives advertisers the opportunity to uniquely deliver their message just prior to purchase.

Not to be outdone by digital, radio is an active participant in the digital arena. Delivery platforms like AM/FM streaming audio, HD radio, and NextRadio are creating new user experiences. And the radio data is feeding seamlessly into Programmatic Solutions and the Marketing Cloud.

Accountability is more than a buzz word. Advertisers increasingly insist on it and radio delivers. Nielsen provides the independent measurement, and our Audio data is now powering high caliber analytics in variety of new ways. Marketing Mix Modeling, Return on Ad Spend, cross-media Incremental Reach, the list goes on. Tools that go beyond traditional audience metrics that are helping advertisers do more than just quantify their CPMs. New analytics that are enabling a much keener understanding of HOW and WHY radio advertising works.

Welcome to the 2017 Audio Today Report, our snapshot of the listening landscape today viewed through many different lenses – reach and audience growth, network radio, podcasting, localism and much more.

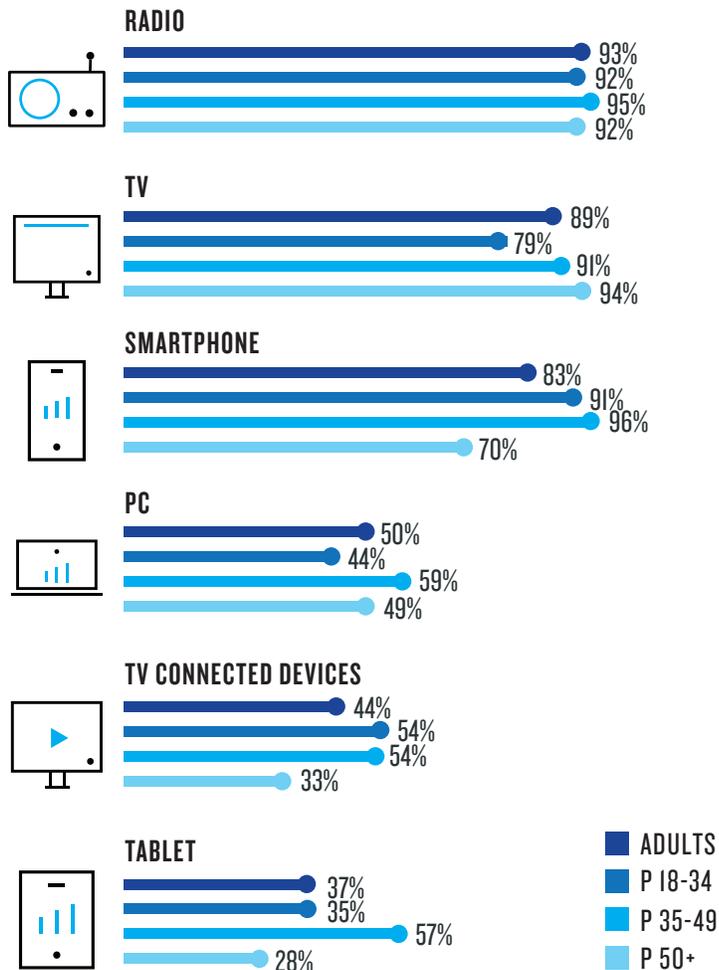


BRAD

*The combined weekly cume persons (270,683,801) is a combination of RADAR 132, March 2017, national 12+ cume (249,841,000) and PPM markets Q4 2016 persons 6-11 cume (11,774,500) and Diary markets projected 6-11 cume (9,068,301). All data sourced to M-SU MID-MID.

RADIO REACHES MORE AMERICANS EACH WEEK THAN ANY OTHER PLATFORM

WEEKLY REACH (% OF POPULATION)

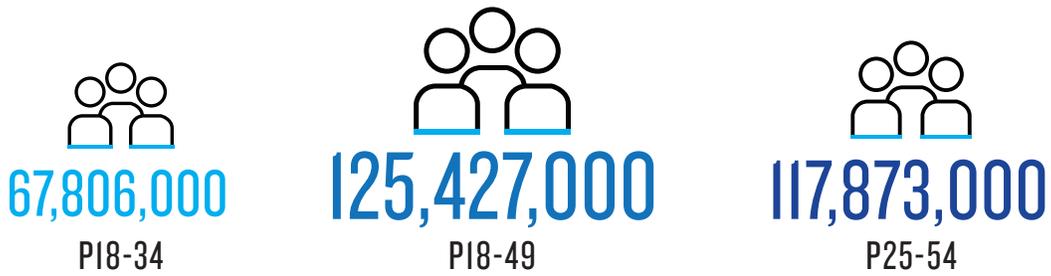


Source: Nielsen Comparable Metrics Report Q4 2016. Adults = P18+. TV Connected Devices = DVD, Game Console, Multimedia Device, VCR

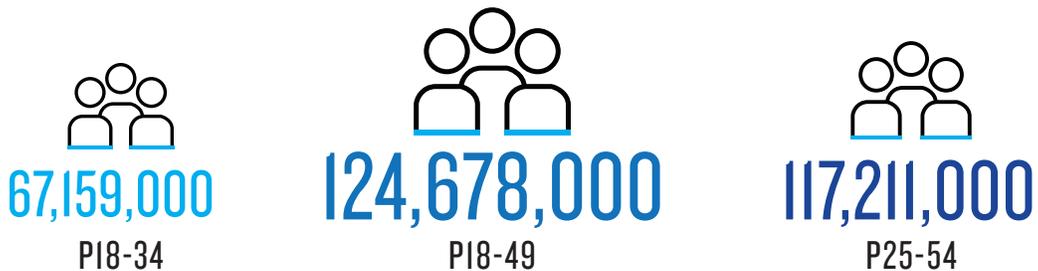
THE RADIO AUDIENCE IN AMERICA CONTINUES TO GROW

WEEKLY CONSUMERS REACHED

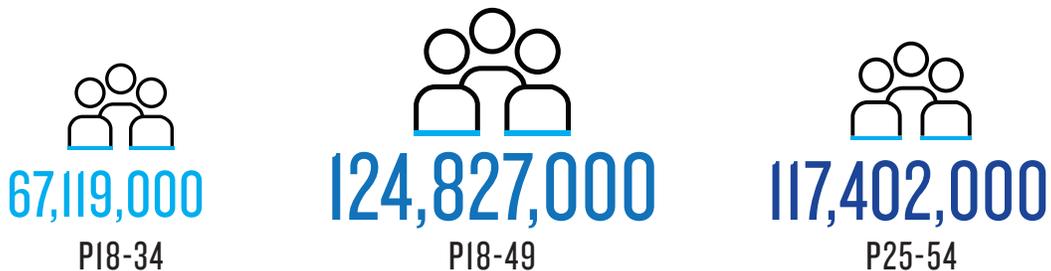
MARCH 2017



MARCH 2016



MARCH 2015

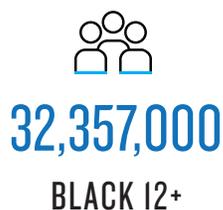


Source: Nielsen RADAR 124, 128, 132. Mon-Sun Mid-Mid, Weekly Cume Audience



RADIO'S AUDIENCE GROWTH IS DIVERSE, TOO

MARCH 2017



MARCH 2016



MARCH 2015



Source: Nielsen RADAR 124, 128, 132. Mon-Sun Mid-Mid. Weekly Cume Audience

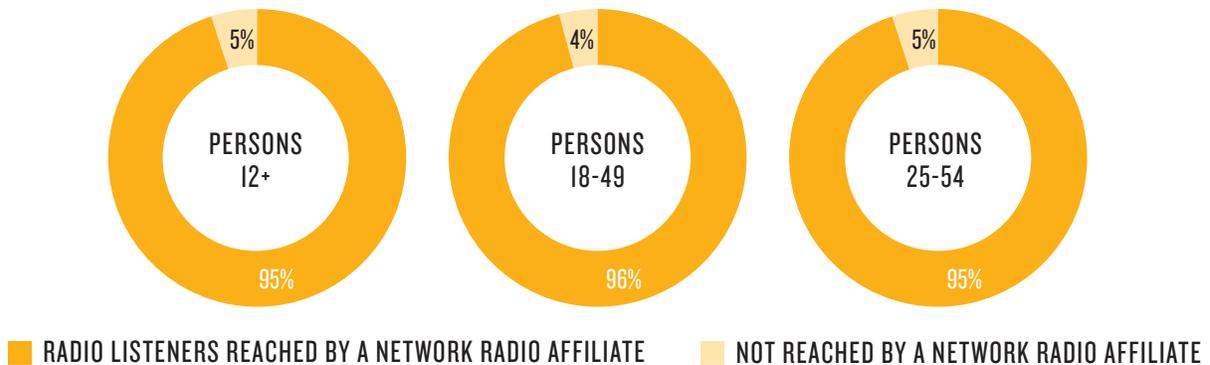
*Nielsen Audio defines 'Other' as all respondents who are not Black or Hispanic. Asian Americans are included, but cannot be separated from the total audience at this time.

NETWORK RADIO REACHES A WIDE VARIETY OF AMERICANS

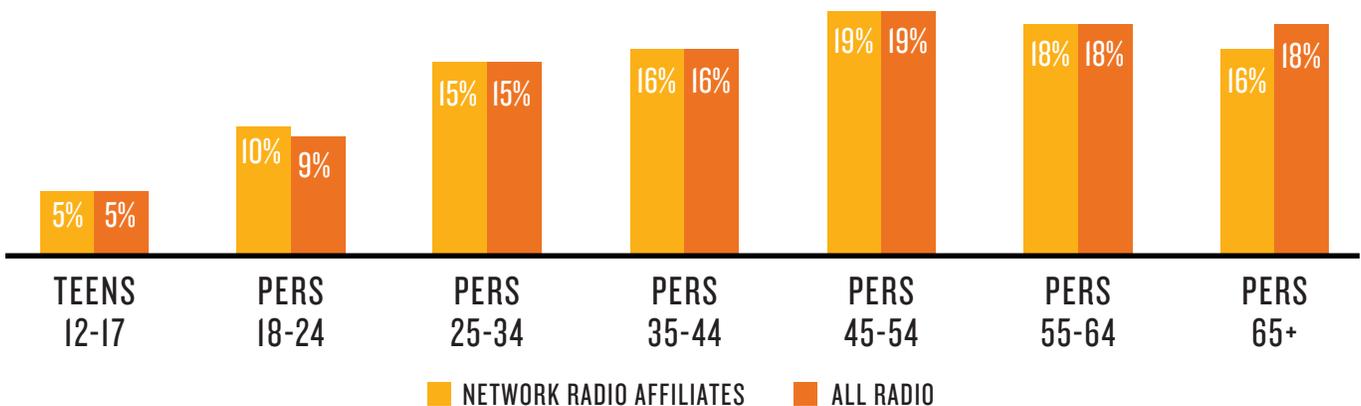
Network programming and services are radio's national currency: a large and diverse catalog of syndicated audio content which includes everything from 24-hour music channels to sports talk and political analysis, as well as some of the biggest personalities in radio.

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

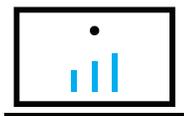
MORE THAN 95% OF RADIO LISTENERS TUNE TO A NETWORK-AFFILIATED STATION EVERY WEEK



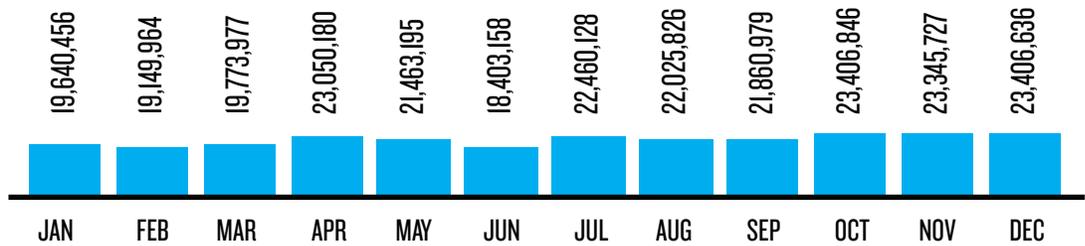
Source: Nielsen National Regional Database, Spring 2016, M-SU 5AM-MID
9,021 AM/FM and HD/Streaming stations that carry programming supplied by the Network Radio Research Council member companies



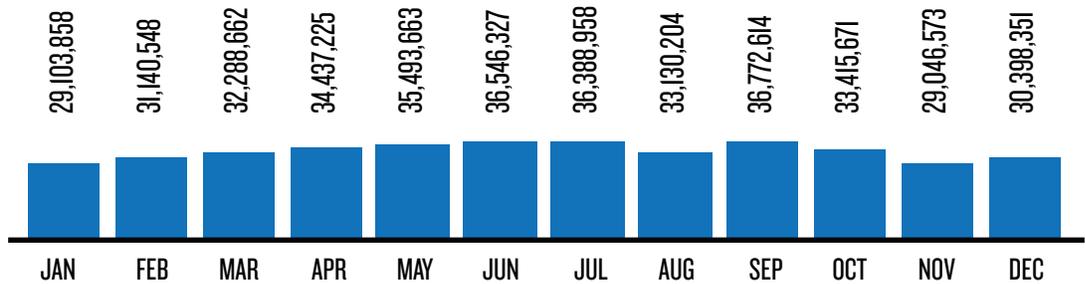
STREAMING AUDIO BY DEVICE: SMARTPHONES DRIVE USAGE



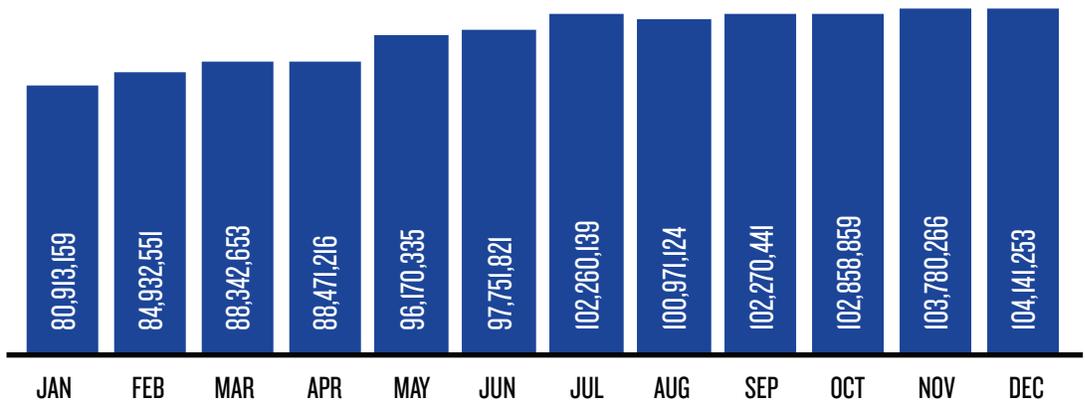
PC



TABLET



SMARTPHONE



FROM JANUARY TO DECEMBER 2016, 23 MILLION MORE PEOPLE LISTENED TO STREAMING AUDIO ON A SMARTPHONE

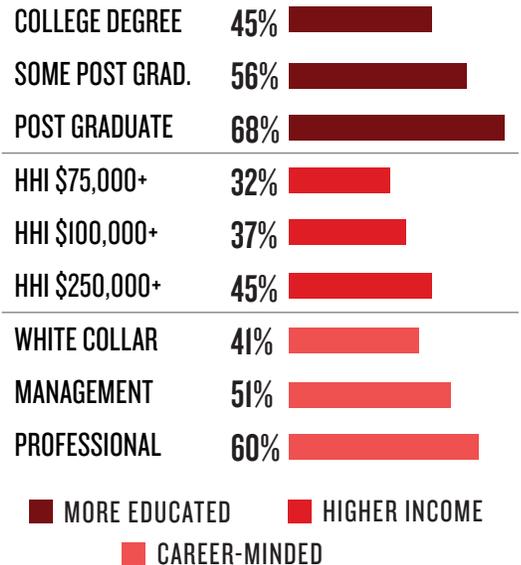
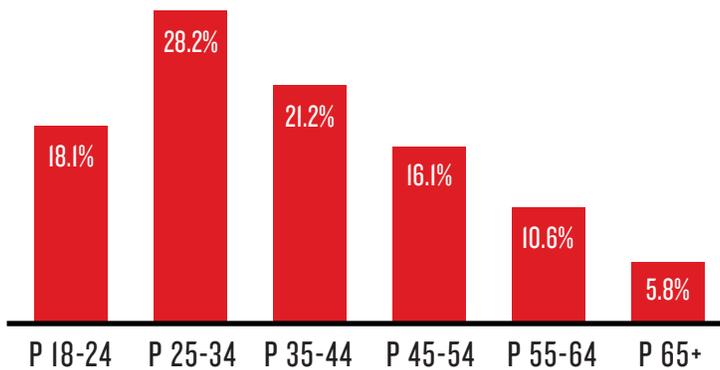
Source: Nielsen Electronic Mobile Measurement Panel Jan 2016 - Dec 2016, Average Audience of Persons 18+

PODCASTING ATTRACTS A YOUNG, EDUCATED & AFFLUENT AUDIENCE

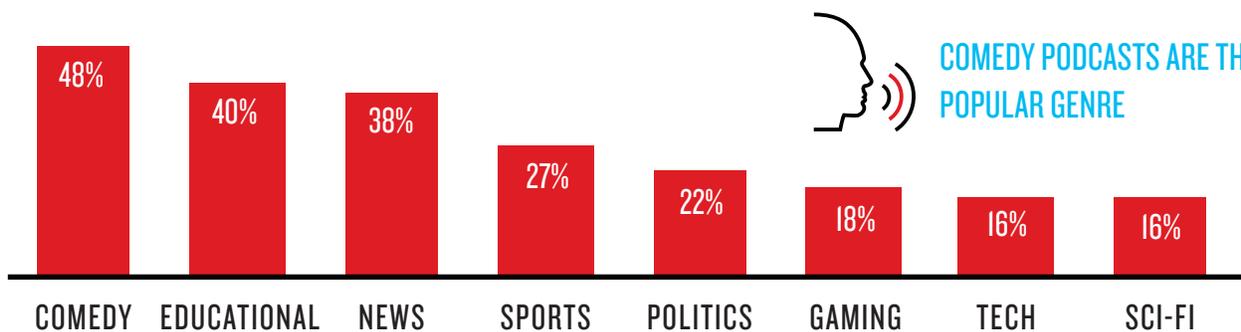
BASED ON PERSONS 18+



PODCAST LISTENERS % MORE LIKELY



Source: Scarborough USA+ Release 2 2016, P18+,
Ways used Internet/apps in past 30 days on any device: Podcasts (watch, listen, or download)



COMEDY PODCASTS ARE THE MOST
POPULAR GENRE

Source: Nielsen Entertainment Fanlinks, 2016 (Podcast fans answered between 2-7 on a 7 point avidity scale)

AMERICA'S TOP FORMATS IN 2016

RANKED BY SHARE OF TOTAL LISTENING (%)



INCLUDING THE MOST HEARD SONG IN 2016 AS CAPTURED
BY NIELSEN BDSRADIO

13.6	COUNTRY* "SOMEWHERE ON A BEACH" BY DIERKS BENTLEY	11.1	NEWS/TALK**
7.9	POP CONTEMPORARY HIT RADIO (CHR) "DON'T LET ME DOWN" BY CHAINSMOKERS FEAT. DAYA	7.8	ADULT CONTEMPORARY (AC)*** "HELLO" BY ADELE
6.0	CLASSIC ROCK "SWEET EMOTION" BY AEROSMITH	5.9	CLASSIC HITS "DON'T STOP BELIEVIN'" BY JOURNEY
5.5	HOT ADULT CONTEMPORARY (AC) "CAN'T STOP THE FEELING!" BY JUSTIN TIMBERLAKE	4.2	URBAN ADULT CONTEMPORARY (AC) "LAKE BY THE OCEAN" BY MAXWELL
3.7	CONTEMPORARY CHRISTIAN "TRUST IN YOU" BY LAUREN DAIGLE	3.6	ALL SPORTS

3.6 URBAN CONTEMPORARY
"NEEDED ME" BY RIHANNA

2.6 MEXICAN REGIONAL
"SOLO CON VERTE" BY BANDA SINALOENSE
MS DE SERGIO LIZARRAGA

2.0 ALTERNATIVE
"FIRST" BY COLD WAR KIDS

1.8 ALBUM ORIENTED ROCK (AOR) +
MAINSTREAM ROCK
"THE SOUND OF SILENCE" BY DISTURBED

1.4 SPANISH CONTEMPORARY + SPANISH
HOT AC *"DUELE EL CORAZON" BY*
ENRIQUE IGLESIAS FEAT. WISIN

2.7 RHYTHMIC CONTEMPORARY HIT RADIO (CHR)
"ONE DANCE" BY DRAKE FEAT. WIZKID & KYLA

2.0 ACTIVE ROCK

1.9 ADULT HITS + 80S HITS
"DON'T YOU (FORGET ABOUT ME)"
BY SIMPLE MINDS

1.5 CLASSICAL

1.4 ALL NEWS

Source: Nielsen National Regional Database, Spring 2016, M-SU 6AM-MID,
All listeners 12+, AQH Share

*Country = Country + New Country

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

***Adult Contemporary = Adult Contemporary + Soft Adult Contemporary
Nielsen BDSradio

AMERICA'S TOP SONGS IN 2016



RADIO AIRPLAY

Rank	Artist	Song	Impressions (000's)
1	Justin Bieber	Love Yourself	39,496
2	Drake Feat. Wizkid & Kyla	One Dance	36,107
3	Justin Timberlake	Can't Stop The Feeling	34,221
4	Sia	Cheap Thrills	33,850
5	Twenty One Pilots	Stressed Out	33,695
6	Chainsmokers Feat. Daya	Don't Let Me Down	30,290
7	Calvin Harris Feat. Rihanna	This Is What You Came For	29,096
8	DNCE	Cake By The Ocean	28,490
9	Justin Bieber	Sorry	27,874
10	Mike Posner	I Took A Pill In Ibiza	27,247



DIGITAL SONG SALES

Rank	Artist	Song	Sales (000's)
1	Justin Timberlake	Can't Stop The Feeling	2,495
2	Chainsmokers Feat. Halsey	Closer	2,268
3	Flo Rida	My House	2,241
4	Lukas Graham	7 Years	2,113
5	Drake Feat. Wizkid & Kyla	One Dance	2,008
6	Twenty One Pilots	Stressed Out	1,867
7	Justin Bieber	Love Yourself	1,817
8	Chainsmokers Feat. Daya	Don't Let Me Down	1,795
9	Rihanna Feat. Drake	Work	1,767
10	Twenty One Pilots	Heathens	1,748



ON-DEMAND STREAMS

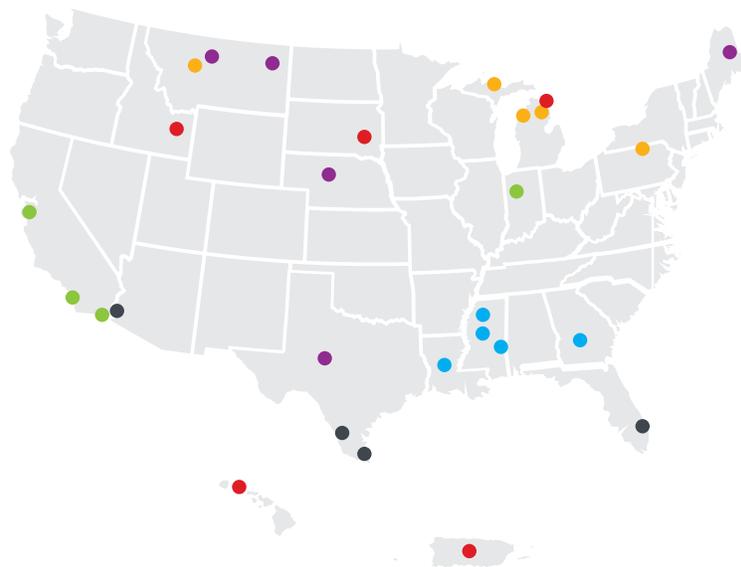
Rank	Artist	Song	Streams (000's)
1	Drake Feat. Wizkid & Kyla	One Dance	527,430
2	Rihanna Feat. Drake	Work	346,914
3	Chainsmokers Feat. Hasley	Closer	340,908
4	Rihanna	Needed Me	322,059
5	Desiigner	Panda	320,828
6	Chainsmokers Feat. Daya	Don't Let Me Down	310,596
7	Drake Feat. Rihanna	Too Good	275,837
8	D.R.A.M. Feat. LIL Yachty	Broccoli	268,790
9	Drake Feat. Popcaan	Controlla	267,647
10	G-Eazy X Bebe Rexha	Me, Myself & I	252,230

Source: Radio Airplay: Nielsen BDSradio. Digital Song Sales: Nielsen SoundScan. On-Demand Streaming: Nielsen BDS collects comprehensive consumer-driven streaming activity from interactive streaming services.

LOCALISM MATTERS: WHAT MUSIC YOU STREAM VARIES BY MARKET

Nielsen Music launched streaming data from all 210 DMA markets last year. In BDSradio, market-level streaming data is available side-by-side with radio airplay, station playlists and digital sales. This gives programmers a direct look at the music listeners want to hear in each unique local market.

TOP MARKETS BY GENRE FOR STREAMING IN 2016



R&B HIP-HOP

Greenwood, MS
Jackson, MS
Meridian, MS
Albany, GA
Alexandria, LA

ROCK

Alpena, MI
Marquette, MI
Helena, MT
Elmira, NY
Traverse City, MI

POP

Puerto Rico
Honolulu, HI
Idaho Falls, ID
Presque Isle, ME
Rochester, MN

COUNTRY

North Platte, NE
Glendive, MT
Presque Isle, ME
Great Falls, MT
San Angelo, TX

DANCE/ELECTRONIC

San Francisco, CA
Santa Barbara, CA
Honolulu, HI
Lafayette, IN
San Diego, CA

LATIN

Laredo, TX
Harlingen, TX
Yuma, AZ
Puerto Rico
Miami, FL

Source: Nielsen BDSradio and Music Connect. DMA level streaming data, ranked on % of genre streamed in 2016.

SOURCING & METHODOLOGIES

SOURCING

Nielsen RADAR 132, March 2017
 Nielsen RADAR 128, March 2016
 Nielsen RADAR 124, March 2015
 Nielsen PPM Markets, Q4 2016
 Nielsen National Regional Database, Spring 2016
 Nielsen Comparable Metrics Report Q4 2016
 Nielsen Scarborough USA+ Release 2 2016
 Radio Airplay: Nielsen BDSradio, Jan 2016-Dec 2016
 Digital Song Sales: Nielsen SoundScan, Jan 2016-Dec 2016
 On-Demand Streams: Nielsen BDS and Music Connect, Jan 2016-Dec 2016
 Nielsen Entertainment Fanlinks, 2016
 Nielsen Electronic Mobile Measurement Panel, Jan 2016-Dec 2016

METHODOLOGIES

Projected Nielsen Diary market 6-11 cume was derived using an extrapolation of the difference in total radio cume by market type among teens 12-17. The Diary market 12-17 weekly cume (9.3 million) is 77% the size of the PPM market 12-17 cume (12.1 million). That same ratio was used to project Diary market 6-11 cume (9.1 million) at 77% the size of PPM market 6-11 cume (11.7 million).

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 Spring 2016 survey.

Nielsen's Diary service surveys respondents in the remaining 218 radio metros in the United States as of the Spring 2015 survey.

Radio airplay as measured by Nielsen BDSradio is captured by electronic monitoring of terrestrial radio stations in 150 U.S. markets. Digital Song Sales: Nielsen SoundScan service aggregates download activity from a comprehensive list of digital retailers. On-Demand Streaming: Nielsen BDS collects comprehensive consumer-driven streaming activity from interactive streaming services.

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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