



**audio**  
**pulse**<sup>TM</sup>

**CAPTURING PERCEPTIONS, OPINIONS AND INTENTIONS AMONG MARKETERS.**

# RADIO: A SOUND DECISION FOR MARKETERS

For consumers, radio plays multiple roles and fulfills various needs. It's a very intimate medium, connecting one-to-many in a way that feels like it is one-to-one. It's emotional, drawing people through the power of storytelling. It's live and local and brings listeners and communities together with the experiences and passions they share.

This presentation provides opinion poll results among marketers and a glimpse at how radio delivers on those insights.

Source: RAB Audio Pulse Poll October 2019-June 2020 among marketers at ANA Masters of Marketing Conference and select Forward articles.

6 poll modules – Radio, Media Strategy, Influencer Marketing, Voice, Creative, Podcasting, 357 Respondents October 2019-June 2020

# 99%

of marketers polled indicate that REACH is important or very important to their brands media strategy.

Only 31 percent of marketers knew Radio is the No. 1 Reach Medium.

Source: RAB Audio Pulse Poll October 2019-June 2020

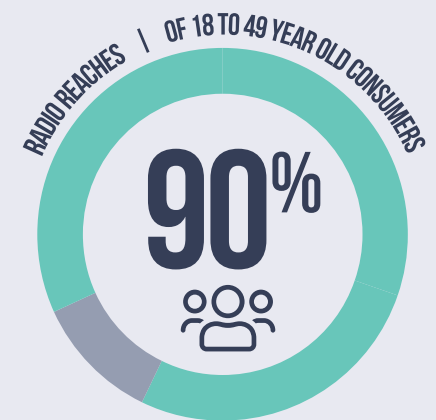
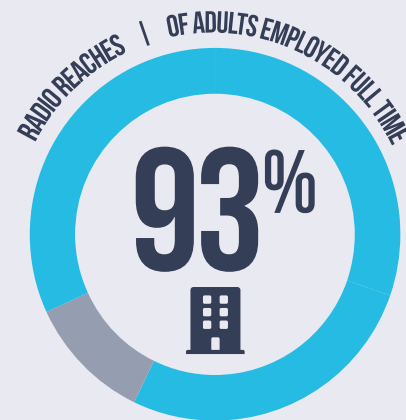
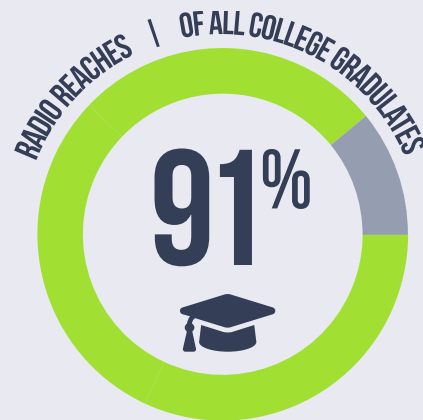
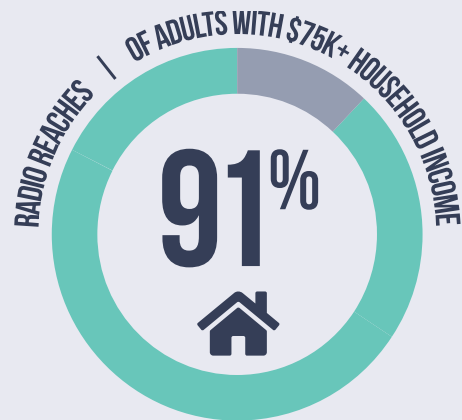


# 229 MILLION PEOPLE

## AMERICA'S #1 REACH MEDIUM

Radio is America's No. 1 reach medium, connecting more adults 18 and older than social media or TV via smartphones, tablets, PCs, or apps and delivering a vast amount of content wherever and whenever listeners want it – on-air, online, and on-demand.

Regardless of advances in technology, radio remains the top source for music discovery and the most used audio source in car.



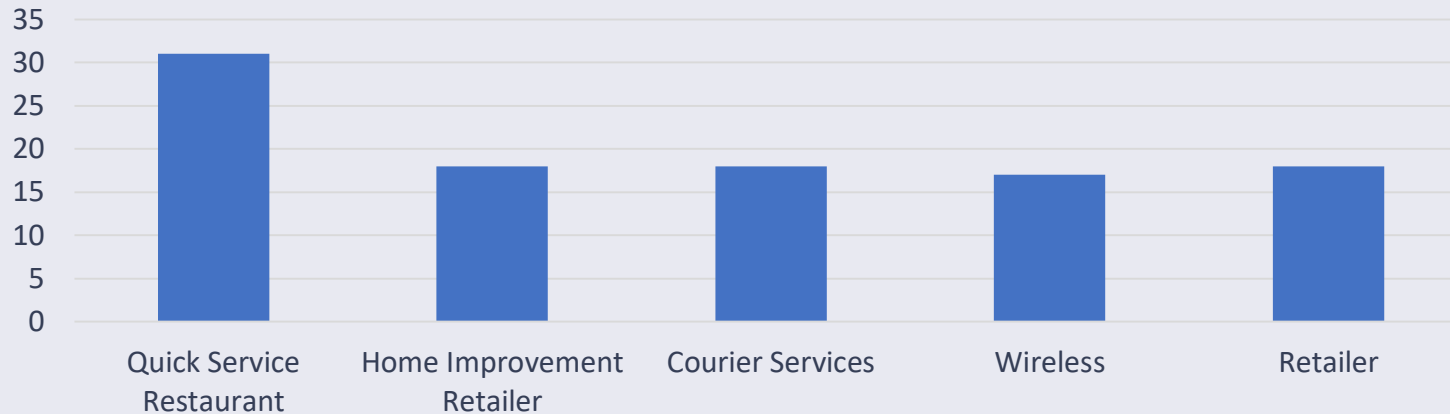
# APPLYING RADIO'S REACH

A series of Nielsen cross-media studies commissioned by CUMULUS MEDIA | Westwood One finds the addition of AM/FM radio to TV plans generate a substantial lift in campaign reach. Ad occurrences from TV and radio campaigns across categories were matched to the 80,000-person Nielsen Portable People Meter panel to determine actual commercial audience exposure and precisely determine those exposed only to the TV ads, those only exposed by AM/FM radio ads, and those exposed both to both the TV and AM/FM radio ads. The resulting analysis found that adding AM/FM radio to the TV plan generates an average lift of 20 percent in incremental reach.

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## RADIO ADDS INCREMENTAL REACH

Incremental reach among persons 6+



## INCREMENTAL REACH GROWS AMONG YOUNGER AUDIENCES

Category	Incremental reach by age				
	P6+	P18-34	P18-49	P35-54	P55+
Quick service restaurant	+31%	<b>+46%</b>	+30%	+32%	+31%
Home improvement retailer*	+18%	<b>+42%</b>	+35%	+25%	+11%
Courier services	+18%	<b>+39%</b>	+33%	+24%	+9%
Wireless	+17%	<b>+35%</b>	+30%	+22%	+8%
Retailer	+18%	<b>+41%</b>	+37%	+30%	+10%



Source: Nielsen PPM Custom Analysis. Aggregate of incremental Reach Studies conducted in 2019/2020.



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A full **45%** of marketers consider radio an effective channel.

Source: Nielsen CMO Report 2018

**64%** of marketers indicate they are only “somewhat” or “not enough” in the know about all that broadcast radio across platforms have to offer.

Source: RAB Audio Pulse Poll October 2019-June 2020

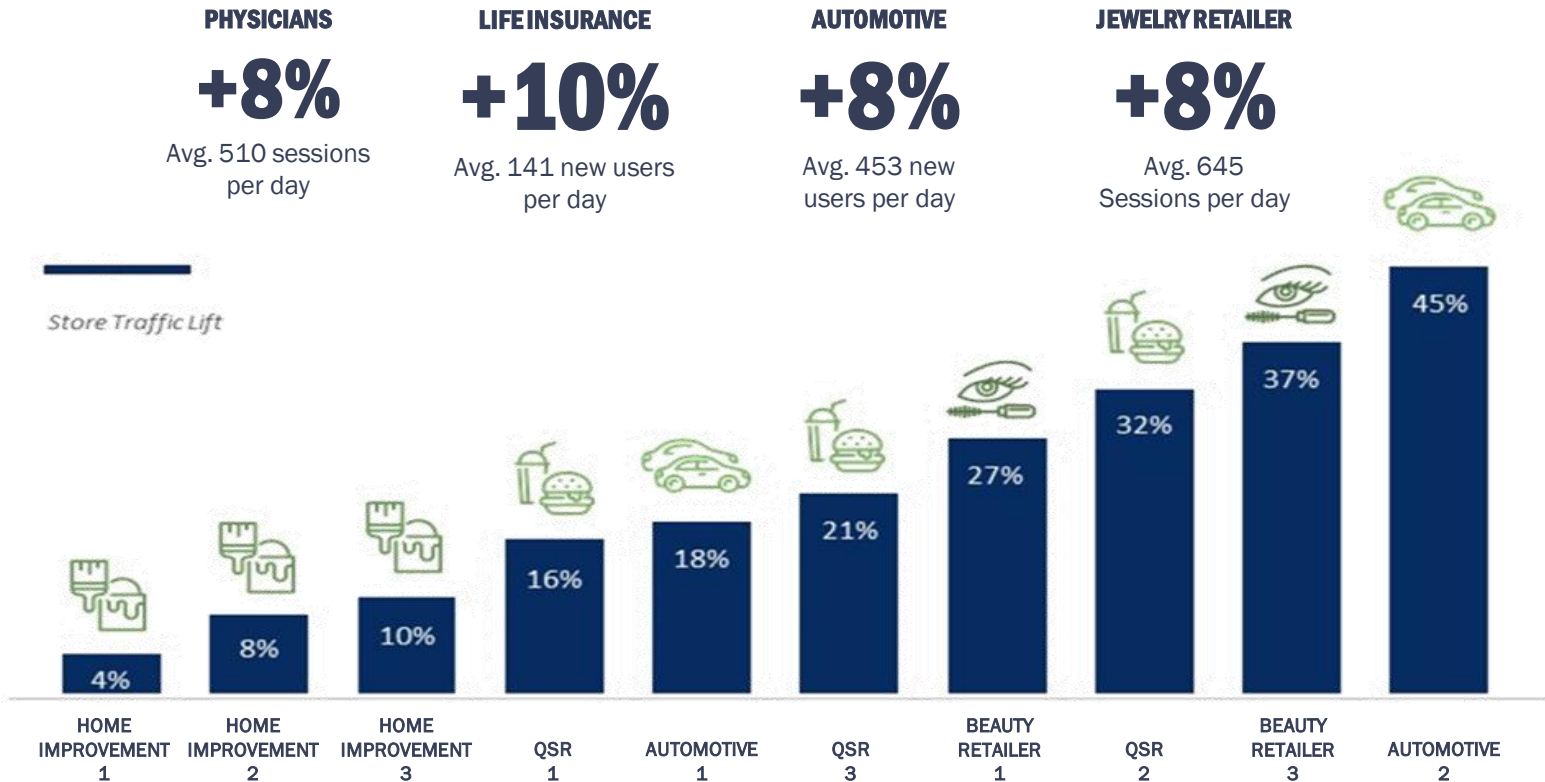


# ON-AIR AND ONLINE, RADIO DELIVERS MEASURABLE RESULTS.

Radio builds web traffic and delivers new users:<sup>1</sup>

Radio delivers an average ROI of \$10 for every \$1 spent on the platform.<sup>2</sup>

On average, radio advertising drove a 21 percent lift in website activity for DTC brands compared to 19 percent for TV and 17 percent for Google/Facebook.<sup>3</sup>



PHYSICIANS

**+8%**

Avg. 510 sessions per day

LIFE INSURANCE

**+10%**

Avg. 141 new users per day

AUTOMOTIVE

**+8%**

Avg. 453 new users per day

JEWELRY RETAILER

**+8%**

Avg. 645 Sessions per day

## RADIO DROVE 22% INCREMENTAL STORE TRAFFIC<sup>4</sup>

Sources: 1) Numeric Owl, 2019/2020 RAB; 2) Nielsen 2014-2016 ; 3) Radio: LeadsRx study of 62 direct-to-consumer advertisers, November 2017-November 2018. TV, Google/Facebook - LeadsRx study of 11 direct-to-consumer advertisers October - December 2018. Cumulus WESTWOOD ONE; 4)Radio Drives Store Traffic, TagStation 2018



# RADIO DRIVES SALES CONVERSIONS

SKINCARE BRAND DROVE

**2,500+** ONLINE ORDERS WITH  
THEIR RADIO.COM CAMPAIGN

RESULTING IN A **\$2.50**  
RETURN ON AD SPEND

\*ROAS calculation based on client average order value (AOV)

Entercom partnered with an online skincare retailer to develop a RADIO.COM in-app audio campaign that ran across multiple markets for six weeks.

Through its Digital Sales Attribution module, Entercom measured sales conversions from ad-exposed audiences via a 1:1 web sales conversion.

The website and RADIO.COM ads were tagged with a Barometric pixel to identify exposed listeners and match them to Claritas/Barometric's proprietary device and identity graph to determine ad-exposed listeners who visited the client's website and completed a purchase.





# RADIO'S POWERFUL IMPACT

Radio drives significant new patient growth for new healthcare brand.

iHeartMedia helped build brand awareness, drive web traffic, and grow new patient registrations for a new healthcare brand. The brand launched in two markets and subsequently grew to ten markets.

The fully-integrated, multi-platform audio campaign included broadcast radio, digital audio, TTWN (Total Traffic Weather News) alongside targeted digital tactics such as email marketing, social support, and location- and audience-based display and video.



iHeart Analytics  
Web Lift Proves  
Radio's Impact



**CAMPAIGN OUTPACES INDUSTRY AVERAGES**  
Proving the message and schedule were more effective than others in the category.



**BROADCAST RADIO DRIVES INCREMENTAL WEB TRAFFIC**  
iHeartMedia radio ads correlated lift in brand's site traffic.



**WEB LIFT INCREASES WHEN DIGITAL IS ADDED TO RADIO**  
iHeartMedia radio + digital marketing vs. radio-only.

# 72%

of marketers polled indicate that it is important or very important for their media efforts to engage locally with consumers.

Source: RAB Audio Pulse Poll October 2019-June 2020



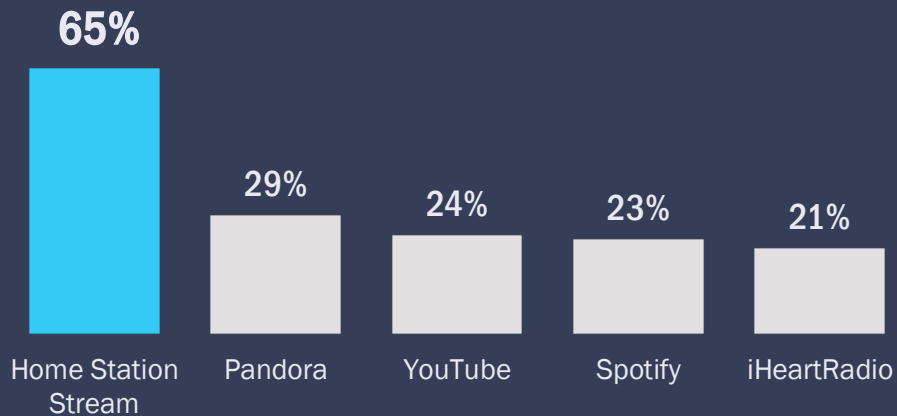
# OF RADIO LISTENERS

BELIEVE THAT RADIO'S PRIMARY ADVANTAGE IS ITS LOCAL FEEL.

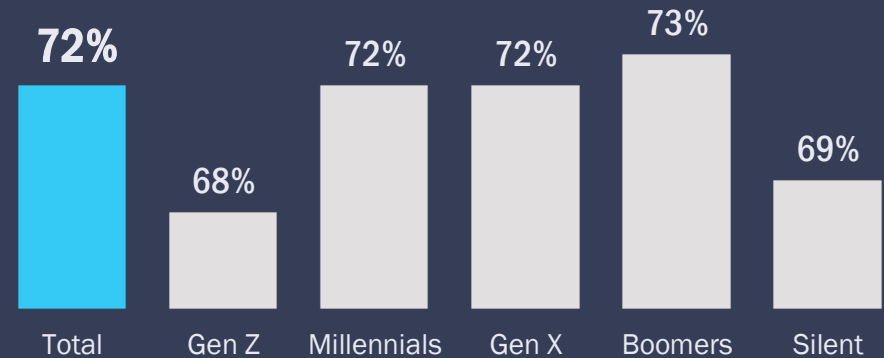
Local radio is important to listeners. It is a trusted source for information keeping them updated on local current events.

## Connection with "home" radio station is KEY

% Who Listen to Each Streaming Audio Platform Weekly or More



% Agreement (Strongly Agree + Agree) of Those Who Feel a Sense of Connection



# MPLS

MINNEAPOLIS

Hubbard Radio has produced over a dozen “Steve the Window Guy” radio commercials and their interactive division produced two TV commercials.



“Since the radio campaign started running, internet traffic and phone calls from our website have increased, proving radio is a powerful way to feed the activity to our website. When potential customers hear you on the radio they start to build a relationship with you. The relationship moves you to top of mind and new business flows from there.”

*Melissa Brager, Director of Operations Steve The Window Guy*

# HOU

HOUSTON

Cox Media Group drove awareness for an auto service parts brand among consumers and organically reach decision makers and influencers at auto shops through an integrated campaign including 15 second short-form spots, targeted display, and social media.



- Houston was the No. 1 lead source to the company’s website across U.S.
- Four-year sales growth of 31 percent over benchmark year
- Averaged 7.75 percent increase in sales per year over the last four years

# PDX

PORTLAND

Townsquare Media delivers multiple consumer touchpoints for a local restaurant to drive lunch sales and support local charities. The integrated promotions includes an on-air sponsorship of the station’s iconic “Two for Tuesday” content, a “Lunch for Good” promotion featuring a charity of the month, and a “Seize the Deal” promotion of gift cards.



- Average 20 percent lift in sales
- Increased foot traffic
- 75 percent lift in new user traffic to the website
- Raised money for local Maine charities
- Sales of 500-1,000 gift cards



**79%**

of marketers consider Radio station on-air personalities as celebrity influencers.

**85%**

say **TRUST** is the most important quality they look for in an influencer.

Source: RAB Audio Pulse Poll October 2019-June 2020

Source: Katz Media Group, Our Media, 2018

**9 OUT OF 10**



listeners engage with their local radio stations – via text, calls, meeting a DJ or other means.



Source: Jacobs Media, Techsurvey 2020

**59% OF RADIO LISTENERS TUNE IN BECAUSE OF THE RADIO DJs OR RADIO HOSTS ON-AIR.**

The foundation of the strong emotional connection consumers have with their radio stations is driven by their favorite radio station personalities on their favorite radio station.



**87% SAY THAT BROADCAST RADIO PERSONALITIES MAKE THEM LAUGH.**

(Source: Vision Critical/MARU, November 2017)

## RADIO PERSONALITIES ARE IMPORTANT TO LISTENERS

**84%**

would follow their radio personality if they went to another radio station.

(Source: Katz Media Group, Our Media, 2019)



**83%**

of listeners value and trust their favorite personality's opinion.

(Source: Vision Critical/MARU, November 2017)



**59%**

believe their daily routine would be different without them.

(Source: Vision Critical/MARU, November 2017)



(Source: Katz Media Group, Our Media, 2019)

81% of listeners consider DJ's a friend, family member or acquaintance



46% trust radio station personalities – they are opinion leaders.

(Source: Vision Critical/MARU, November 2017)

# INFLUENCERS OUTPERFORM

Regional Utility Company partnered with Katz Radio Group to leverage radio for the first time to build awareness and drive website traffic and online engagement for their Home Services division.

The company ran a mix of :30 brand spots, :30 endorsement spots, and :15 traffic sponsorships.

The campaign has resulted in a 21 percent lift in user sessions attributed to radio.

Radio personality endorsements outperformed campaign averages by 13 percent.



**+21%**



LIFT IN WEB TRAFFIC  
ATTRIBUTED TO RADIO

**+13%**



ENDORSEMENTS  
OUTPERFORMED  
CAMPAIGN AVERAGE

**+21%**



DAILY WEB TRAFFIC  
INCREASE ON-AIR  
DAYS VS. OFF-AIR

# RELEVANCE AND RELATIONSHIP DRIVE OUTCOME



A pest control advertiser partners with Cox Media Group Atlanta to reach niche demographics to drive their business.

Radio personalities selected to endorse the brand are based on the trusted, familial relationships they have with listeners.

During COVID-19, this advertiser made a conscious decision to continue to invest but pivot messaging weekly to provide listeners the peace of mind and comfort they needed as news and moods shifted. For example:

- African-American consumers were hypersensitive towards PPE and in-home activities so the Urban format personality focused on these aspects.
- Families relate to families so the Adult Contemporary station influencer included his wife and young son in the ads talking about their time in quarantine.
- Reports from the news/talk station were informative and educational in tone focused on precautions and safety measures.

**+11%**



LIFT IN WEB TRAFFIC  
ATTRIBUTED TO RADIO

(Source: LeadsRX March 11-June 24)

**+11%**



APRIL/MAY 2020  
SALES GROWTH (YOY)

(Source: Pest Control Advertiser)

**+31%**



JUNE 2020  
SALES GROWTH (YOY)

(Source: Pest Control Advertiser)



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# 80%

of marketers polled agree their brand needs to establish audio cues on radio for the growing adoption of voice-activated devices.

Source: RAB Audio Pulse Poll October 2019-June 2020

# DELIVERING RADIO CONTENT VIA AI

More than **157M** smart speakers in U.S. households.

Source: NPR/Edison Research, December 2019

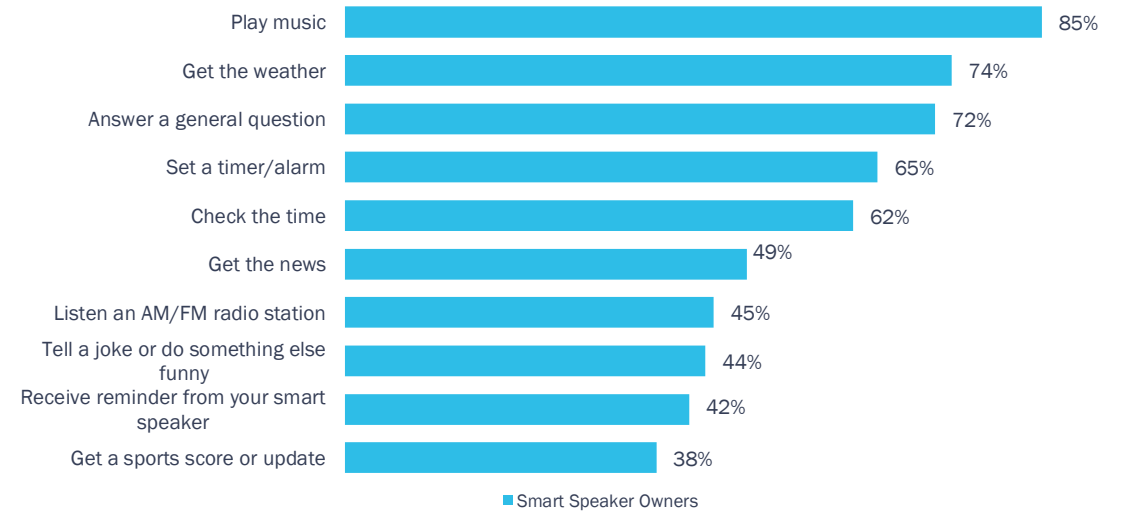
**60M+** people 18+ own a smart speaker

Source: NPR/Edison Research, December 2019

**95%** use their smart speaker to listen to music.

Source: Nielsen Total Audience Report, 2019

Top 10 Weekly Smart Speaker Requests



Source: The Smart Audio Report, NPR/Edison Research, April 2020



**AM/FM RADIO IS #1 IN SMART SPEAKER SHARE OF TIME SPENT**

**60%**

AM/FM radio share of listening on the smart speaker is 60 percent bigger than Amazon Music.

Source: Edison Research, "Share of Ear," Q4 2018, Q1-Q3 2019, Persons 13+; AM/FM Radio 24%, Amazon Music, 15%

# VOICE DRIVES ACTION

April 2020 smart speaker campaign shows significant growth in awareness for a national brand.

**+47%**  
**TOTAL RECALL**

A brand received audio entitlement and was featured prominently in smart speaker, over the air tune-in promos at the launch of AM/FM radio station content.

When listeners asked their smart speakers to play one of CUMULUS MEDIA's 424 AM/FM radio stations, a 15-second pre-roll message for brand would play before the AM/FM radio station programming would commence.



Source: Dynata April 2020 study of a brand's smart speaker campaign, control: n=197 exposed n=78

# 57%

of marketers polled do not think the quality of radio ad creative is as good as ad creative for other media.

Source: RAB Audio Pulse Poll October 2019-June 2020

## AD AGENCY RESEARCH ON STORYTELLING FOUND:

Audio ads drive 21 percent stronger emotions than visual ads

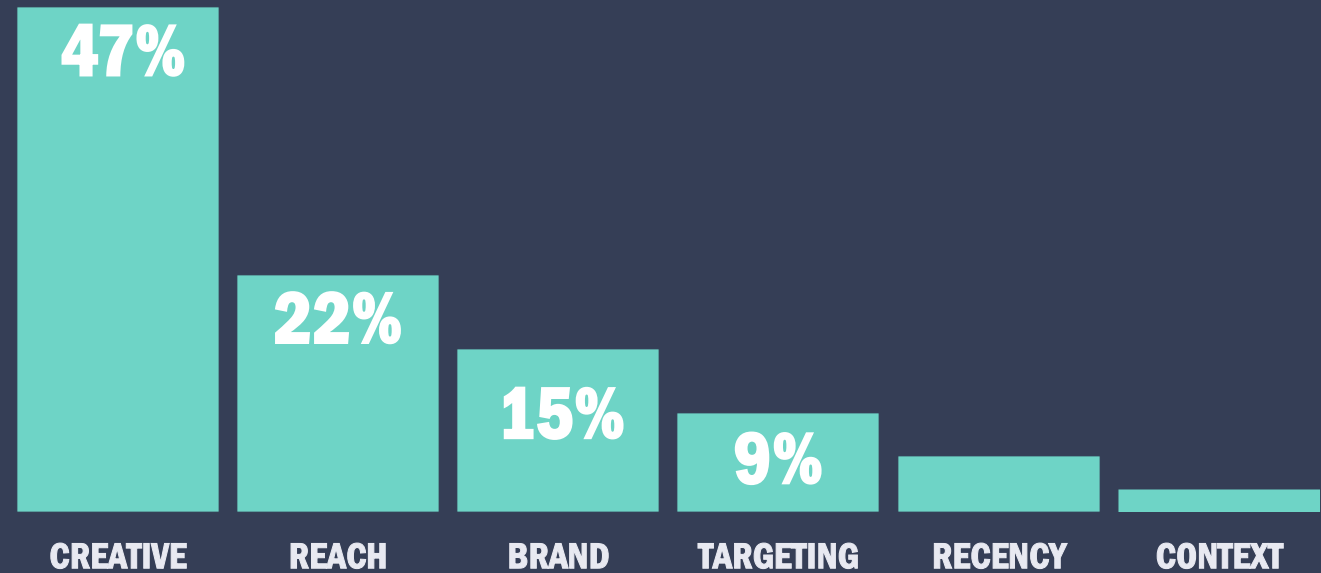
Audio ads drove 50 percent more emotional peaks than visual ads

Audio ads have a consistent increase in emotional engagement for a brand than visual-only ads

Audio makes call-to-action ads a uniquely positive emotional experience

Source: MindShare Neurolab, 2019; 90 adults 18-54

# CREATIVE IS THE MOST IMPORTANT FACTOR FOR DRIVING SALES



(Source: Nielsen Catalina Solutions. Nearly 500 campaigns across all media platforms, 2016-Q12017)



Tell Stories



Female voices work



Tone matters



Disclaimers influence purchase intent



Consider radio format



Sonic branding and music



Localize and personalize



Timing Counts

# THE RIGHT STORY DRIVES RESULTS

# #1

Volume dealer in New Hampshire as a result of the radio campaign.

A local independent automotive dealership located 2 miles from a hospital needed to gain share while supporting first responders during the pandemic.

Maintained 100 percent of radio spend, switched copy to promote 0 percent financing for 84 months.

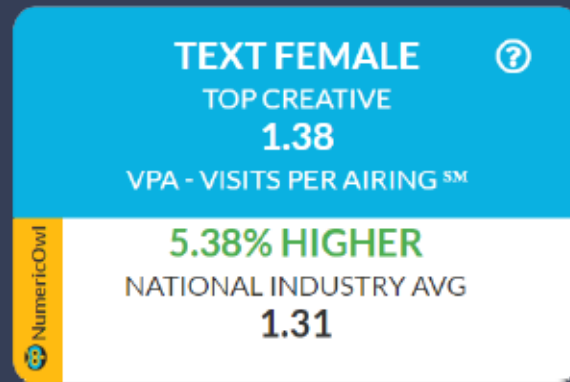
Townsquare Media added bonus support by running a separate message promoting free oil changes for first responders.

In three weeks, they booked 100 free oil changes that directly led to 6 new car sales. In addition, they have grown market share to No. 1 volume dealer in March and April.

# ONE MESSAGE 3-WAYS DROVE RESULTS



TEXT FEMALE	69
TEXT MALE	49
AFFORDABLE SPAN	31



Beasley Media Group in Ft. Myers, Fla. partnered with an air conditioning company to run an off season campaign to generate incremental activity and sales.

Beasley created three campaigns personalized and customized with the station formats and target audiences in mind (female, male, Hispanic adults).

In just one week of advertising on Beasley radio, traffic to the air conditioning company's website jumped from an average of 500 visits to 2,037 visits.

# 92%

of marketers polled think hearing podcast content on broadcast radio will help drive awareness and downloads to the long-form podcasts.

Source: RAB Audio Pulse Poll October 2019-June 2020

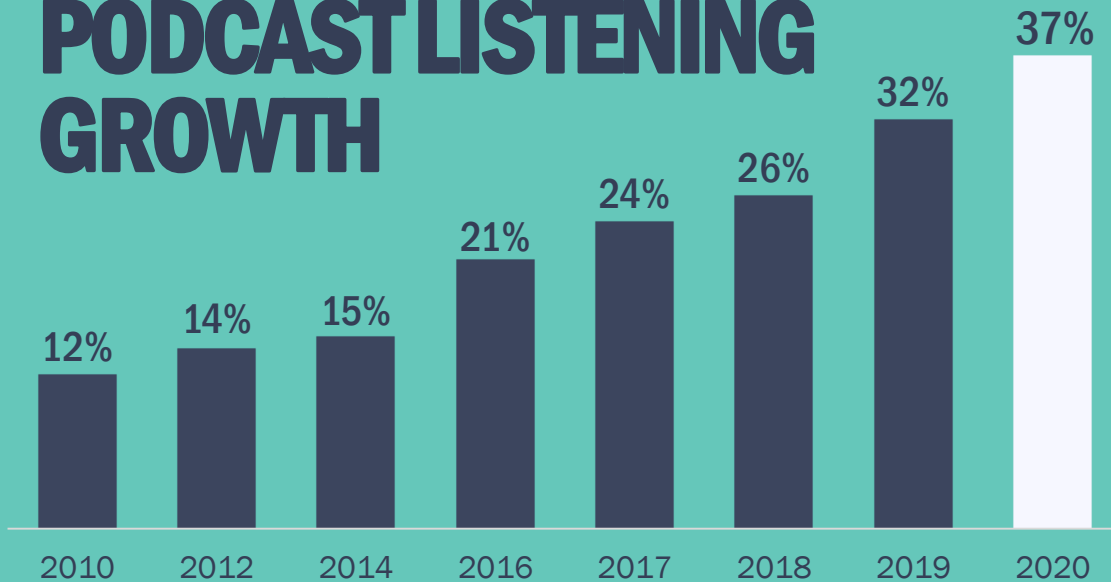


**50%** OF ALL HOMES ARE PODCAST FANS  
THAT'S 61.7 MILLION HOMES

**22%** ARE AVID  
PODCAST FANS

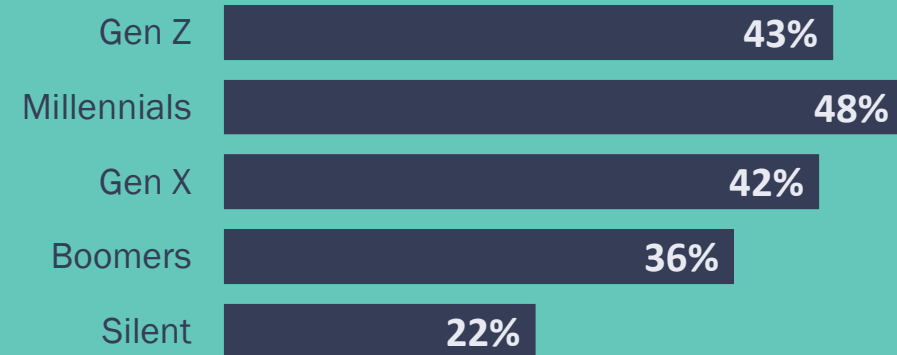
Source: Nielsen Scarborough USA+, Release 2 2010-2016, Adults 18+,  
Listened to a podcast on any device in the past 30 days.

## PODCAST LISTENING GROWTH



Source: The Infinite Dial 2020 – Edison Research/Triton Digital

## Percentage of Weekly Podcast Listeners Who Say They Are Listening to Podcasts/On-Demand Audio More in the Past Year



## PODCAST LISTENERS ARE AUDIO SUPERFANS

Daily Time Spent with Audio

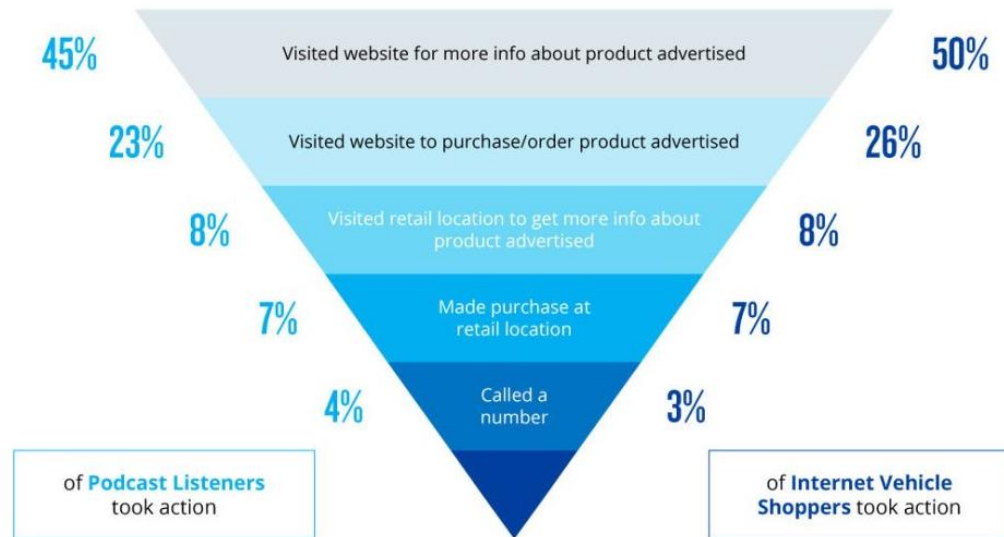


Source: Edison Research, "Share of Ear," Q4 2018. Q1-Q3 2019, P13+; includes broadcast radio, owned music, YouTube music videos, SiriusXM, TV music channels, Pandora, Amazon Music, Apple Music, other streaming audio and podcasts

# INTERNET BUYERS RESPOND TO PODCAST ADS

50 percent of internet automotive vehicle shoppers visited a website for more information about a product after hearing about it on a podcast, which is five percentage points higher than the average podcast listener.

ACTIONS TAKEN AS A RESULT OF HEARING AN AD IN A PODCAST



nielsen

Source: Nielsen Scarborough Podcast Listener Buying Power, Rel 2, 2019 (USA+) Internet Vehicle Shoppers (Base: Podcast Listeners)

ANA

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ADVERTISING  
BUREAU

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# RADIO

Radio across platforms provides the targeted, trusted media environment to reach and engage consumers with the power of the brands' voice to drive results.



**RADIO  
UNITES**



**RADIO  
HELPS**



**RADIO  
INFORMS**



**RADIO  
ENTERTAINS**



**RADIO DRIVES  
RESULTS**

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