

Listening and engagement that drive results

Exploring radio's truths to power up the brand's plans.

RADIO DRIVES SCALE

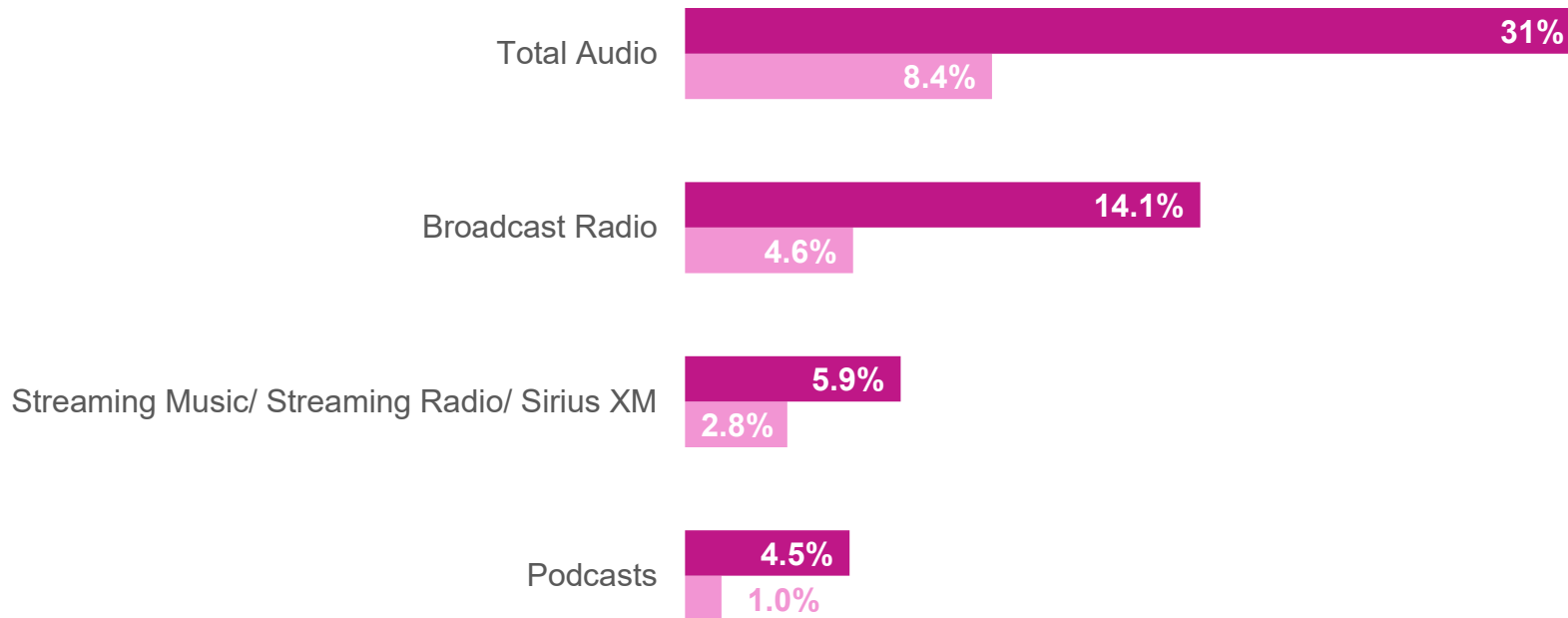
RADIO AMPLIFIES

RADIO IS MEASURABLE

RADIO IS IMMERSIVE

Share of media spend vs. **share of consumption**

■ Ad-supported consumption ■ Ad spend

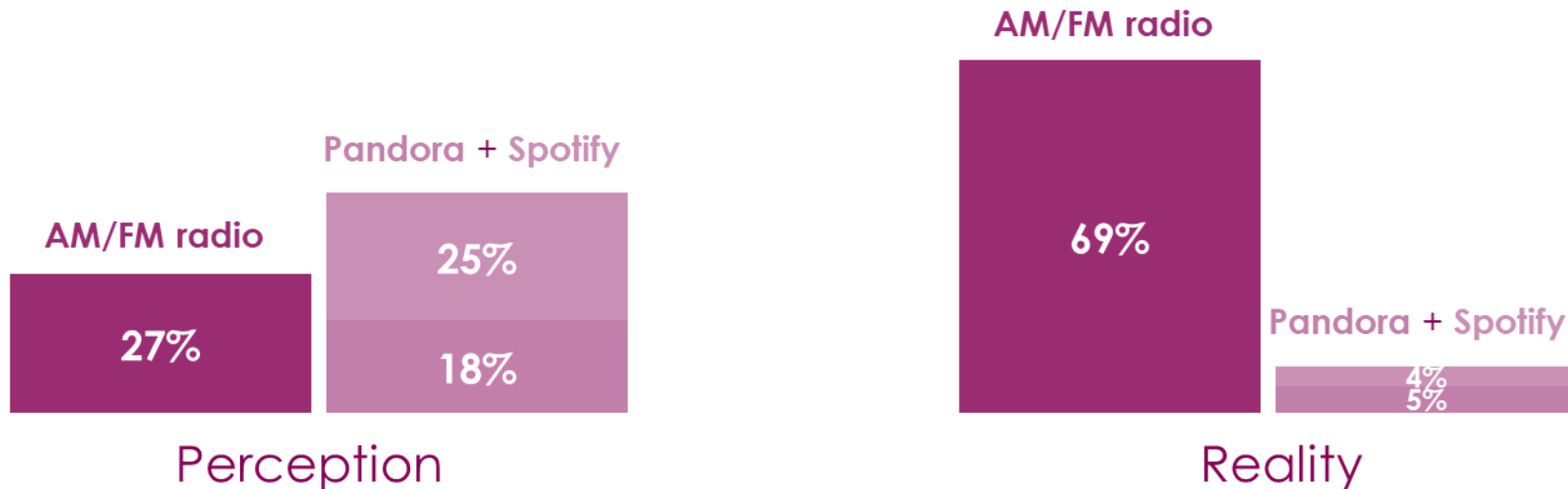


Sources: Total Audio - Audio: Edison Research total audio consumption estimates, reflecting all devices; Non-Audio: eMarketer total digital and traditional media consumption time, excluding radio, digital audio, connected devices, and "other media." WARC estimates that the average American adult consumes 540 minutes of ad-supported media per day. Spend data WARC Media.

Radio is the king of the audio universe

AM/FM radio share of audience is **17X** larger than ad-supported Spotify and **14X** larger than ad-supported Pandora

AM/FM radio's actual share is **2.6X** greater than what advertisers perceive



Perception of advertisers and agencies vs. actual share of ad-supported audio time spent among persons 18+

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.

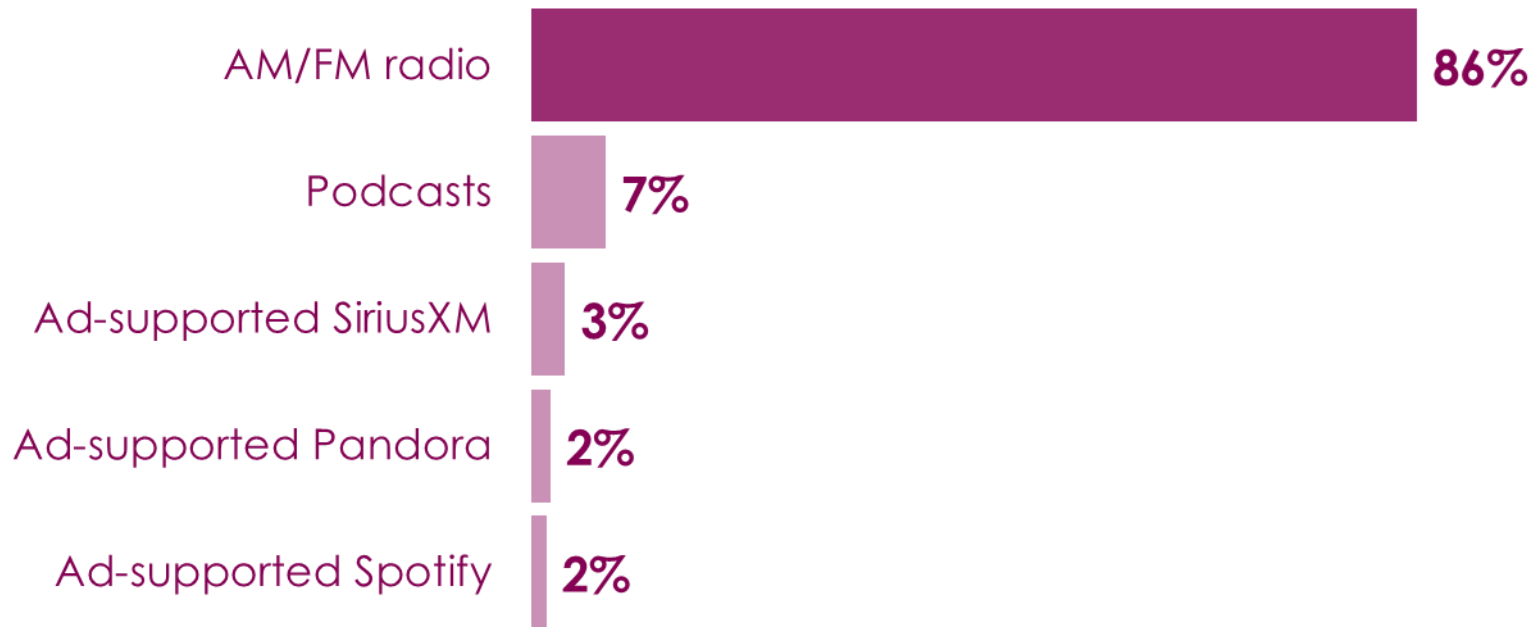
Radio breaks through a complex media landscape

**REACHING
MORE
ADULTS
EACH WEEK
THAN
ANY OTHER
MEDIUM.**

MEDIA	P18+ WEEKLY REACH
AM/FM Radio	213 MILLION
Smartphone Audio	112 MILLION
Tablet Audio	26 MILLION
Satellite Radio	56 MILLION
Live & Time Shifted TV	191 MILLION
CTV	204 MILLION
Smartphone Video	199 MILLION
Tablet Video	87 MILLION
Social Media Smartphone	206 MILLION
Social Media Tablet	89 MILLION
Social Media Computer	80 MILLION

AM/FM radio rules the road

Radio is your customer's companion, a welcomed voice, the news they need, the entertainment they want. Share of time spent with radio in the car dwarfs all other ad-supported audio.



Source: Edison Research, "Share of Ear," Q3 2023 – Q2 2024. Persons 18+, in the car; SiriusXM: Ad-supported: Spoken Word. Ad-free: Music; Podcasts listened to on streaming platforms are included in 'podcasts;' Percentages may not add up to 100 due to rounding.

Radio is held to the strictest measurement standards

5-Minute to 3-Minute
Qualifier shift will
average a **24%**
increase in
listening audience
and impressions.

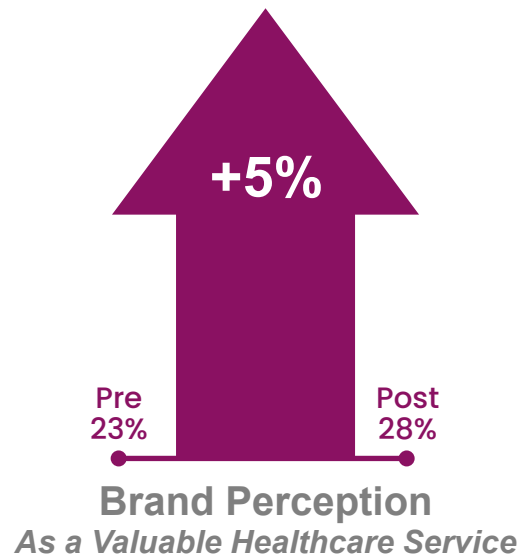
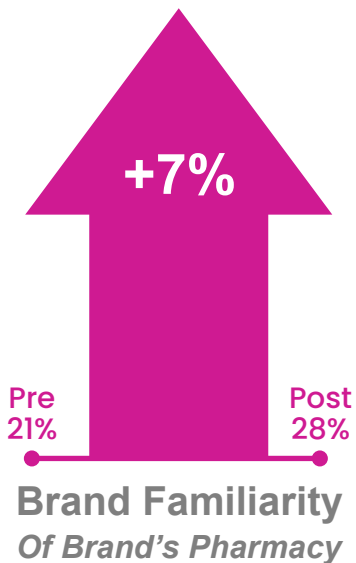
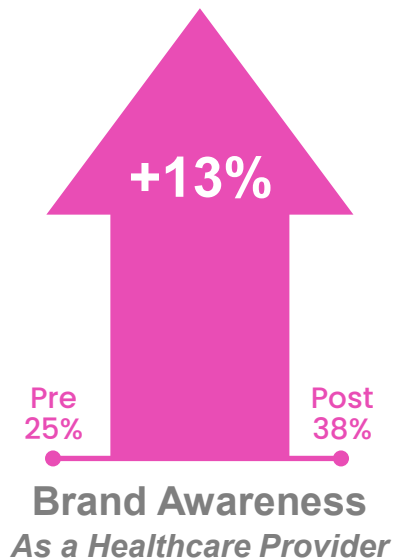
AD MEASUREMENT REQUIREMENT	
MEDIA	VIDEO/AUDIO
TikTok	On-screen appearance, 2 seconds
Snapchat	50% visibility, 2 seconds
Pinterest	50% visibility, 2 seconds
Spotify	50% visibility, 15 seconds (listen)
LinkedIn	50% visibility, 2 seconds
Facebook	50% visibility, 3 seconds
Instagram	50% visibility, 3 seconds
X	50% visibility, 2 seconds
YouTube	50% visibility, 11-30 seconds
Television	1 minute*
AM/FM RADIO	3 minutes of measured listening required of every 15-minute segment (PPM – 12 mins an hour.)

Sources: Company reports, Nielsen (Radio/TV) *Note: 1-minute ratings available for TV; currency remains a 5-Minute qualifier.

Radio's powerful scale **drives awareness**

New online healthcare brand investment in AM/FM radio improves KPIs

Multimedia, total audio drives results for online healthcare brand.

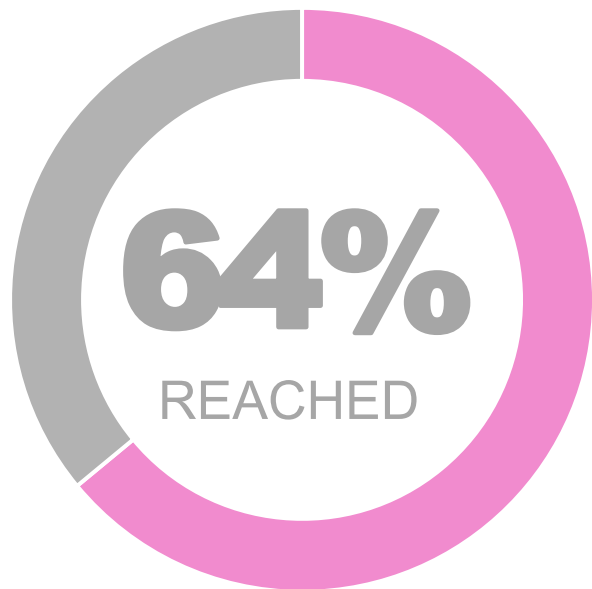


PRE/POST INCREASES AMONG RADIO-TARGETED CONSUMERS

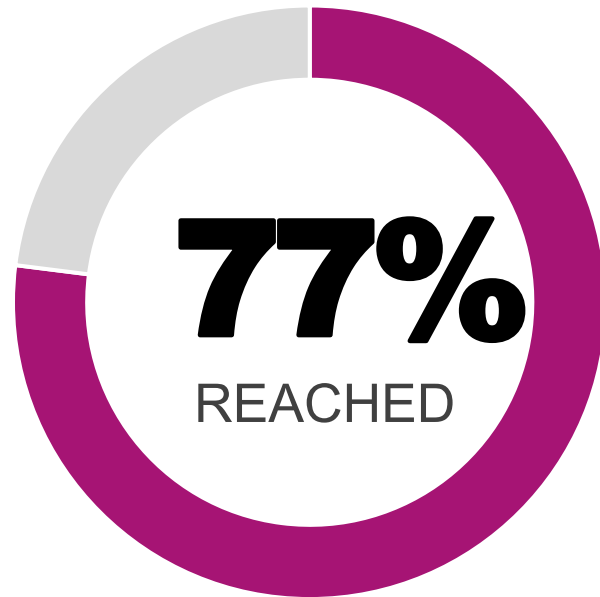
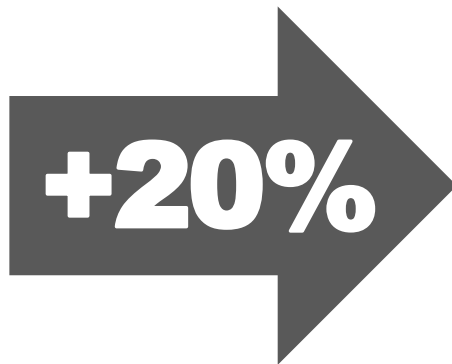
Radio accelerates the plan's delivery

TV, CTV and digital plan delivers 64% total reach of target.

Reallocating 10% of the plan to AM/FM radio increased the plan's reach by 20% to 77%.



68% TV + 13% CTV + 20% Digital



61% TV + 11% CTV + 18% Digital +
10% AM/FM Radio

Source: National Nielsen Media Impact August 2024 campaign. \$10,000,000 national campaign in both instances. Television campaign based on an average CPP of \$20,000; Radio: \$5,000, CTV and digital: CPM of \$10. Standard National Campaign Persons 18+

ROI from Radio surpasses other media

Perception is **NOT** reality

PERCEPTION

MEDIA	% PERCEIVED EFFECTIVENESS
Search	65%
Video	65%
Display	62%
CTV	60%
OOH	58%
TV	55%
Podcasts	54%
Print	50%
RADIO	46%

REALITY

MEDIA	WEIGHTED AVERAGE ROI \$
RADIO	\$2.00
Video	\$1.56
Display	\$1.52
Podcasts	\$1.49
TV	\$1.47
Print	\$1.47
OOH	\$1.33
Search	\$1.16
CTV	\$1.15

Ad-enabled audio makes other media **work harder**

Bundling audio with other media will...

Increase Social
Performance By

83%

Increase TV
Ad Recall By

35%

Lift Google
Search Activity

29%

Add Incremental
Reach to CTV

81%

Audio helps the brand become **easy to mind, easy to find**

Radio ads perform for highly visual categories

95% as effective as television for skincare and 89% as effective for haircare.

Sound deeply influences human emotion and memory through subconscious processing

Evokes immediate emotional responses, triggers and often creates memories to shape a person's perceptions and drive behaviors.

Consumers are far more engaged with an audio story than a video narrative

Greater physiological responses (heart rate, body temperature and galvanic skin response) among those listening vs. watching the same story.

Radio influencers build everlasting trust and engagement

The original social influencers, radio's on-air personalities are trusted voices that enhance the daily lives of listeners and increasing the value the of brands, products and services they endorse.

THIS!

IS RADIO

THE AUDIO LEADER



Radio performs strongly on media fundamentals.



Radio is integral to the communications mix.



Radio elevates audio impact.



Radio delivers attributable outcomes.



Radio is trusted, accountable and a safe environment.



Radio is any brand's workhorse to drive bottom line results.

THIS!
IS RADIO
THE AUDIO LEADER

rab.com/thisisradio

RAB

rab.com

Appendix

SETTING THE RECORD STRAIGHT

PERCEPTION	REALITY
No one listens to AM/FM radio.	AM/FM radio reaches 82% of the population weekly.
Most are still working from home, commuting is way off, impacting AM/FM radio listening.	85% of pre-COVID commuters are working outside the home. In-car AM/FM listening has returned to pre-pandemic norms.
Audience shares to Pandora/Spotify are larger than AM/FM radio.	The audience share of AM/FM radio is 17X larger than ad-supported Spotify and 14X larger than ad-supported Pandora.
In the world of the connected car, the number one thing people do in their car is stream online radio on their smartphones.	AM/FM radio rules ad-supported audio in the car.
Today's optimal media plan: Put all of your money into connected TV, TV, and digital.	AM/FM radio boosts campaign reach, adding over 14 points of incremental reach beyond TV, CTV, and digital.
The optimal audio buy is Spotify, Pandora, and podcasts.	Digital audio reaches only a third of America. AM/FM radio reaches two-thirds.
I would love to consider audio. However, there's a total lack of ROI and sales lift and outcomes evidence for AM/FM radio.	Audio is #2 in short-term ROI, #3 in long-term ROI. AM/FM radio generates a +14% average lift in site traffic across 17 campaigns.
AM/FM radio cannot be measured.	Anything that can be measured in digital and TV can be measured in audio.
No one under 35 listens to AM/FM radio anymore.	Over 55M persons 18-34 listen to AM/FM radio weekly.

APPENDIX: Perception/Reality Sources

- Perception: Advertiser Perceptions, August 2024, 303 advertisers and agencies
- Reality: Nielsen Total Audience Report Q1 2024; Custom Nielsen study conducted April, May, June, & October 2020, March, June & September 2021, and March 2022 via an online survey among P18+.
- *For those who said they were “furloughed or laid off and have since gone back to work” assumes the same ratio of those who work outside the home (52%) as the total employed population
- Maru/Blue November 2022, study of 1516 adults 18+
- MARU/Matchbox April 2023, study of 1617 adults 18+
- MARU/Matchbox October 2023, study of 1000 adults 18+
- MARU/Matchbox April 2024, study of 1617 adults 18+
- Edison “Share of Ear” AM/FM Radio proportion of 25-54 listening occurring in the car. 2016-2024 surveys are from Q3-Q2 of each respective year
- Advertiser Perceptions, August 2024, 303 advertisers and agencies, perception = total ad-supported Pandora and ad-supported Spotify
- Edison Research, “Share of Ear,” Q3 2023 – Q2 2024. Persons 18+
- Edison Research, “Share of Ear,” Q3 2023 – Q2 2024. Persons 18+
- SiriusXM: Ad-Supported: Spoken Word. Ad-Free: Music; Podcasts listened to on streaming platforms are included in ‘podcasts.’ Edison Research, “Share of Ear,” Q3 2023 – Q2 2024. Persons 18+, in the car;
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- Edison Research, “Share of Ear,” Q3 2023 – Q2 2024. Persons 13+
- Profit Ability 2, April 2024 – Short term benchmarks: Ebiquity, EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK.
- Long Term Multipliers: EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK. ROI in British pounds converted to U.S. \$ as of April 27, 2024
- LeadsRx Attribution Studies, 17 Campaigns, 2019-2023
- Nielsen Fall 2023 Nationwide, 1 Week Cume, M-Su 12m-12m