THE POWER & VALUE OF RADIO

Oxnard/Ventura

SOUTHERN CALIFORNIA RADIO

The following fact-based overview showcases the enormous power of Radio…

- Including the intrinsic value of Radio
- What radio means to listeners today
- The commercial environment that only Radio provides
- The ubiquitous platforms of Radio
- A clear comparison of Radio to other media
- The loyal and rabid connection of Radio and its listeners
- And finally, why Radio is still the most powerful and compelling advertising platform today

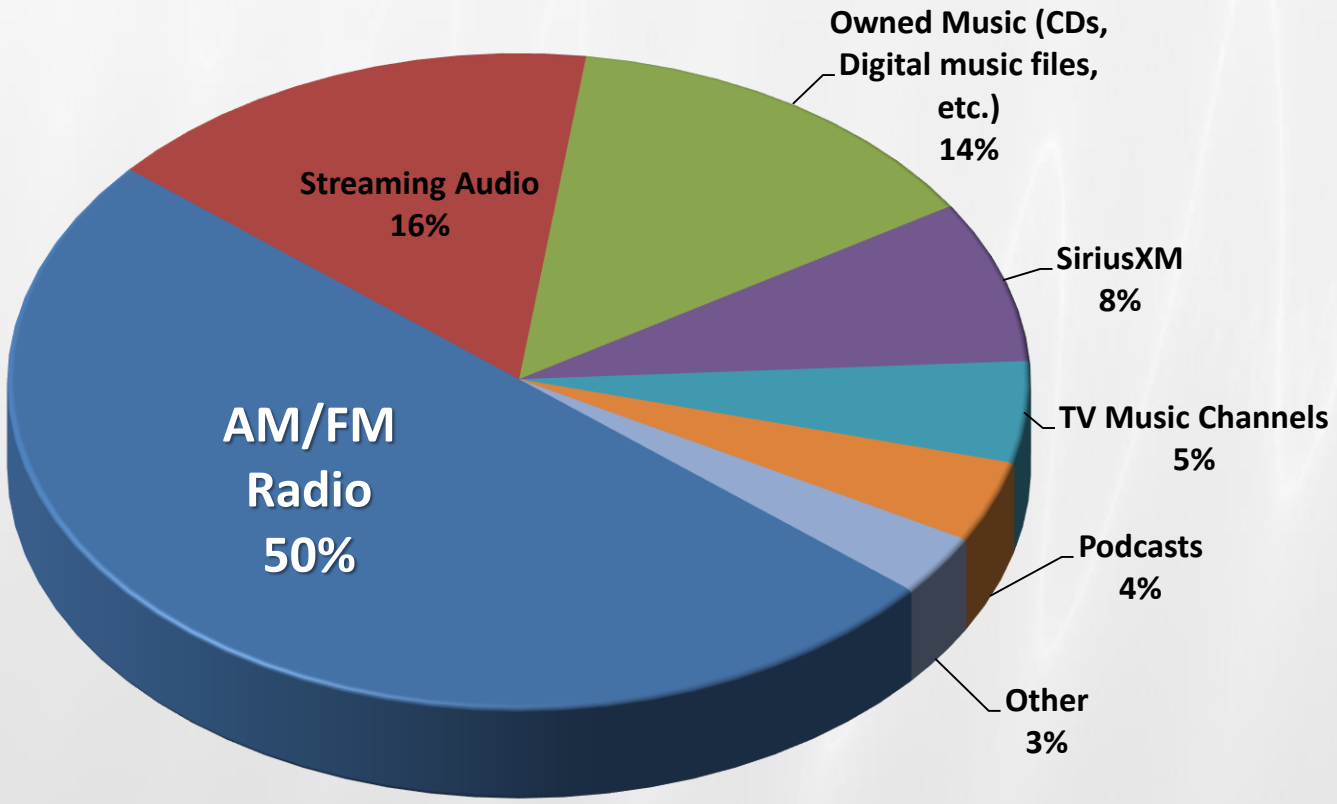
WITH SO MANY LISTENING OPTIONS AVAILABLE…

Why do so many people in Oxnard/Ventura still listen to Radio? And why that's important to advertisers.

AMERICANS SPEND MORE TIME WITH RADIO THAN WITH STREAMING AUDIO

Share of Ear

Americans' 13+ Share of Time Spent Listening to Audio Sources

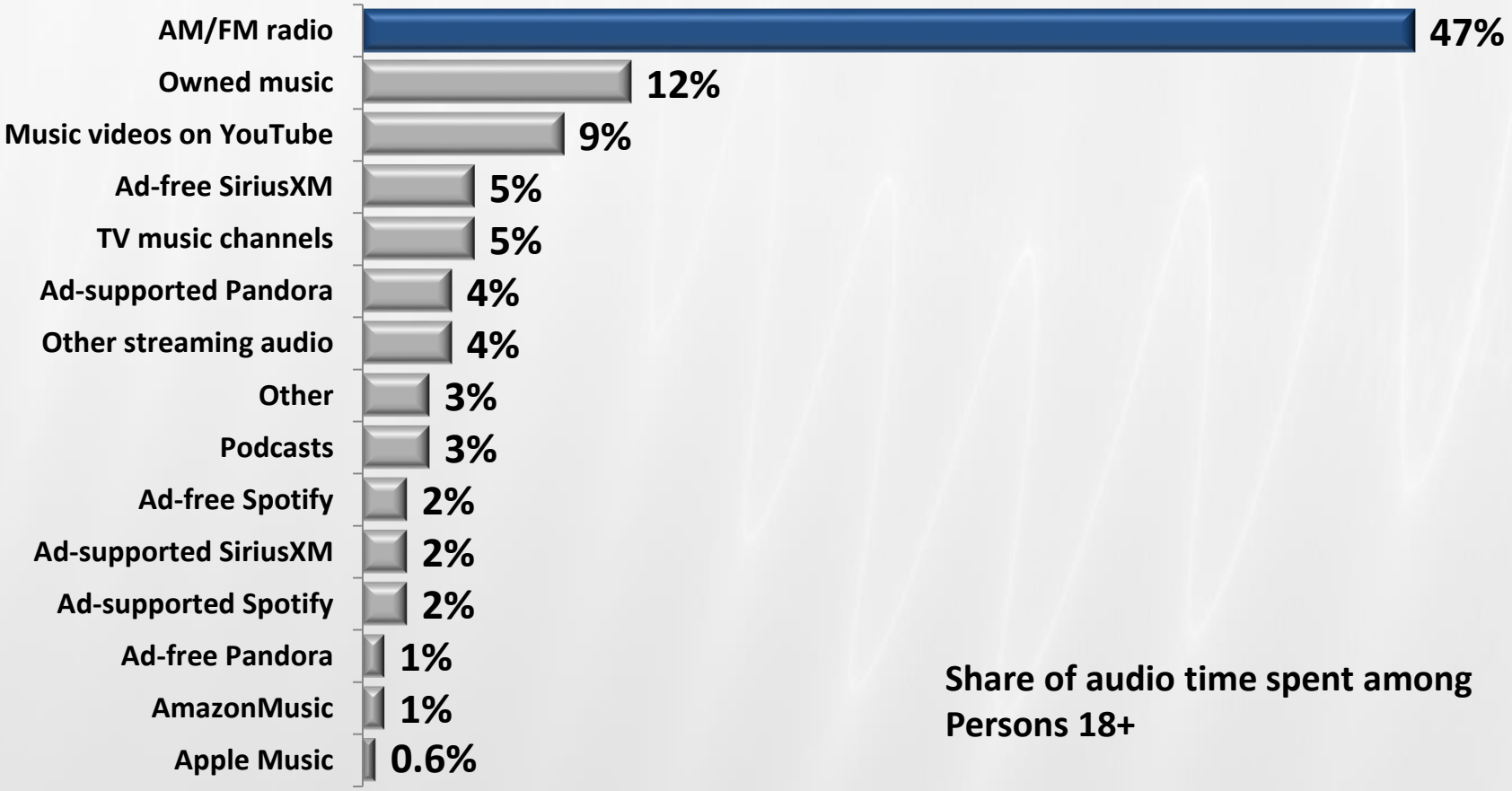


Note: AM/FM radio includes over the air and online streaming.
Streaming Audio includes pure plays such as Pandora, Spotify, and others.

Source: Edison Research, Share of Ear Q1 2018, Americans spend an average of 3 hours and 49 minutes each day consuming audio. This graph represents the share of time spent with each. Based on a nationally representative sample of 5,538 American ages 13+ who completed a 24-hour audio listening diary.

AM/FM RADIO IS THE CENTERPIECE OF AUDIO

The size and strength of AM/FM radio

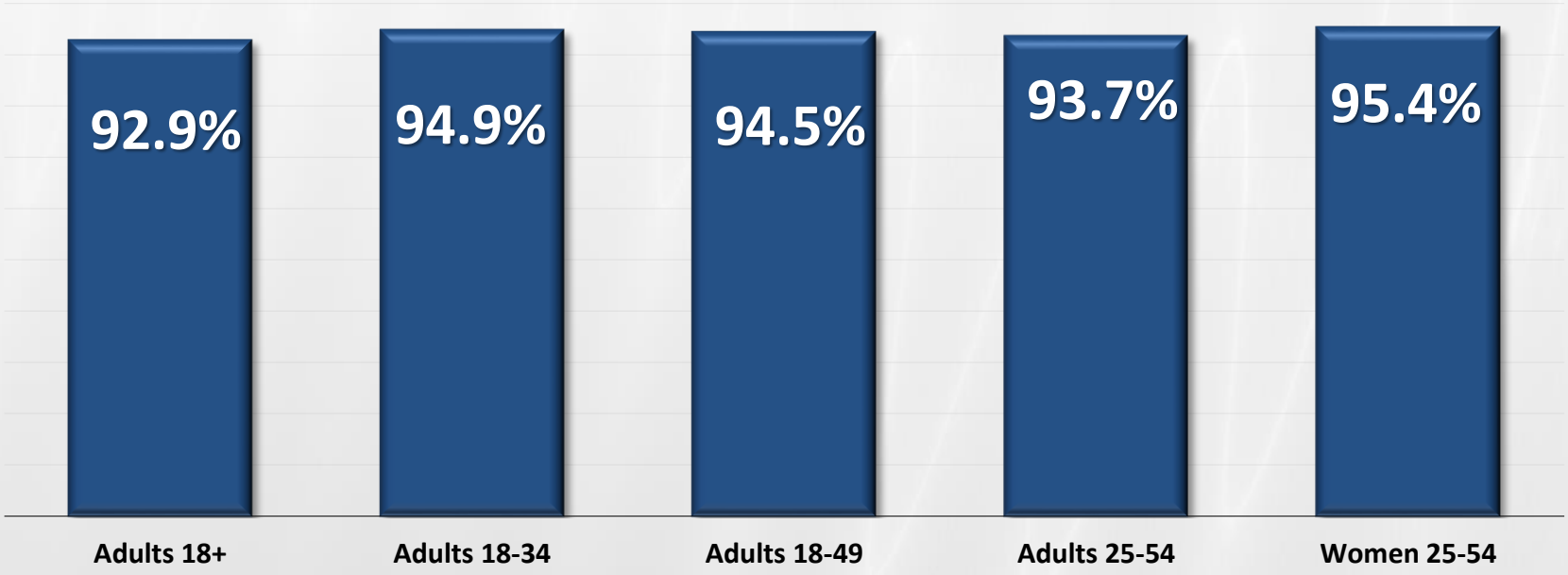


Share of audio time spent among Persons 18+

Source: Edison Research, *Share of Ear*, Q2-Q4 2017, Q1 2018. Persons 18+.
SiriusXM: Ad-Supported: Spoken Word. Ad-Free: Music
Percentages may not add up to 100 due to rounding

ONLINE RADIO LISTENING COMPLEMENTS OVER-THE-AIR RADIO

% of monthly Online Radio listeners who listened to over-the-air AM/FM Radio
Monday-Sunday, 6a-mid

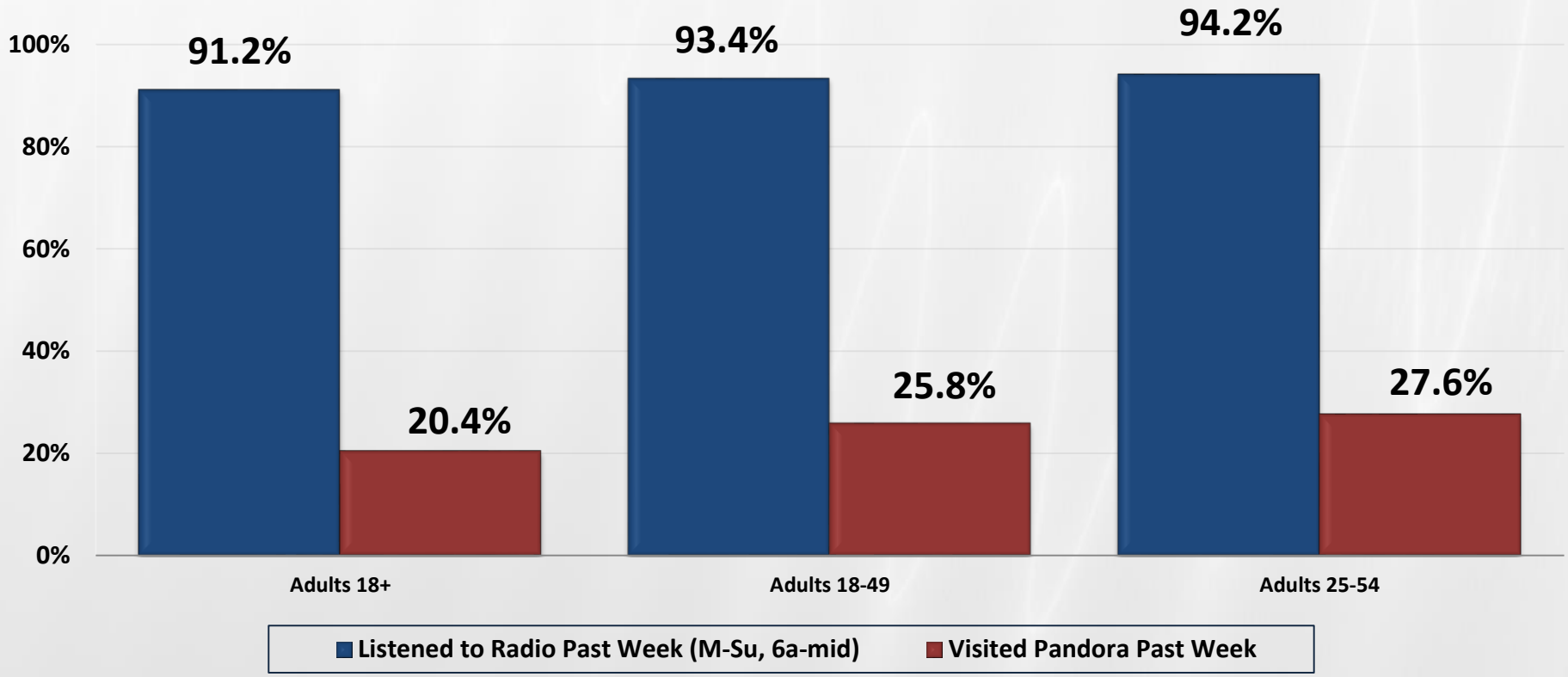


Online Radio = Listening to AM/FM radio stations online and/or listening to audio content available only on the Internet.

Source: Scarborough, R1 2019 (January 2018 – 2019), Oxnard/Ventura CBSA, online radio listeners.

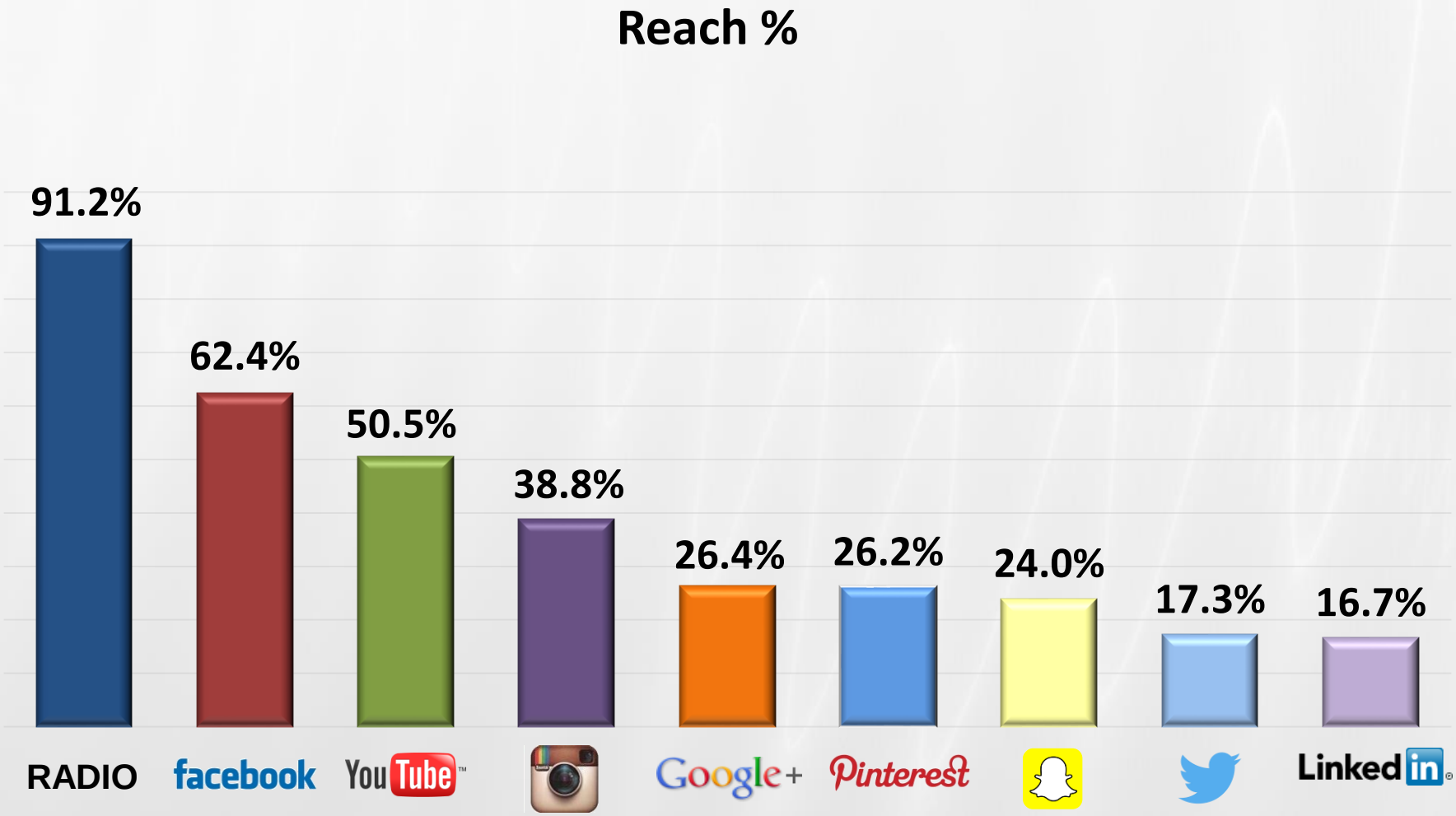
Scarborough.

RADIO REACHES MORE ADULTS ACROSS ALL DEMOS IN A WEEK THAN PANDORA REACHES IN A WEEK



Source: Scarborough, R1 2019 (January 2018 – 2019), Oxnard/Thousand Oaks/Ventura CBSA.

MORE VENTURA ADULTS 18+ LISTEN TO RADIO IN A *WEEK* THAN VISIT THESE SOCIAL NETWORKING SITES IN A *MONTH*



Source: Scarborough, R1 2019 (January 2018 - 2019), Oxnard/Ventura CBSA, Adults 18+.

Scarborough.

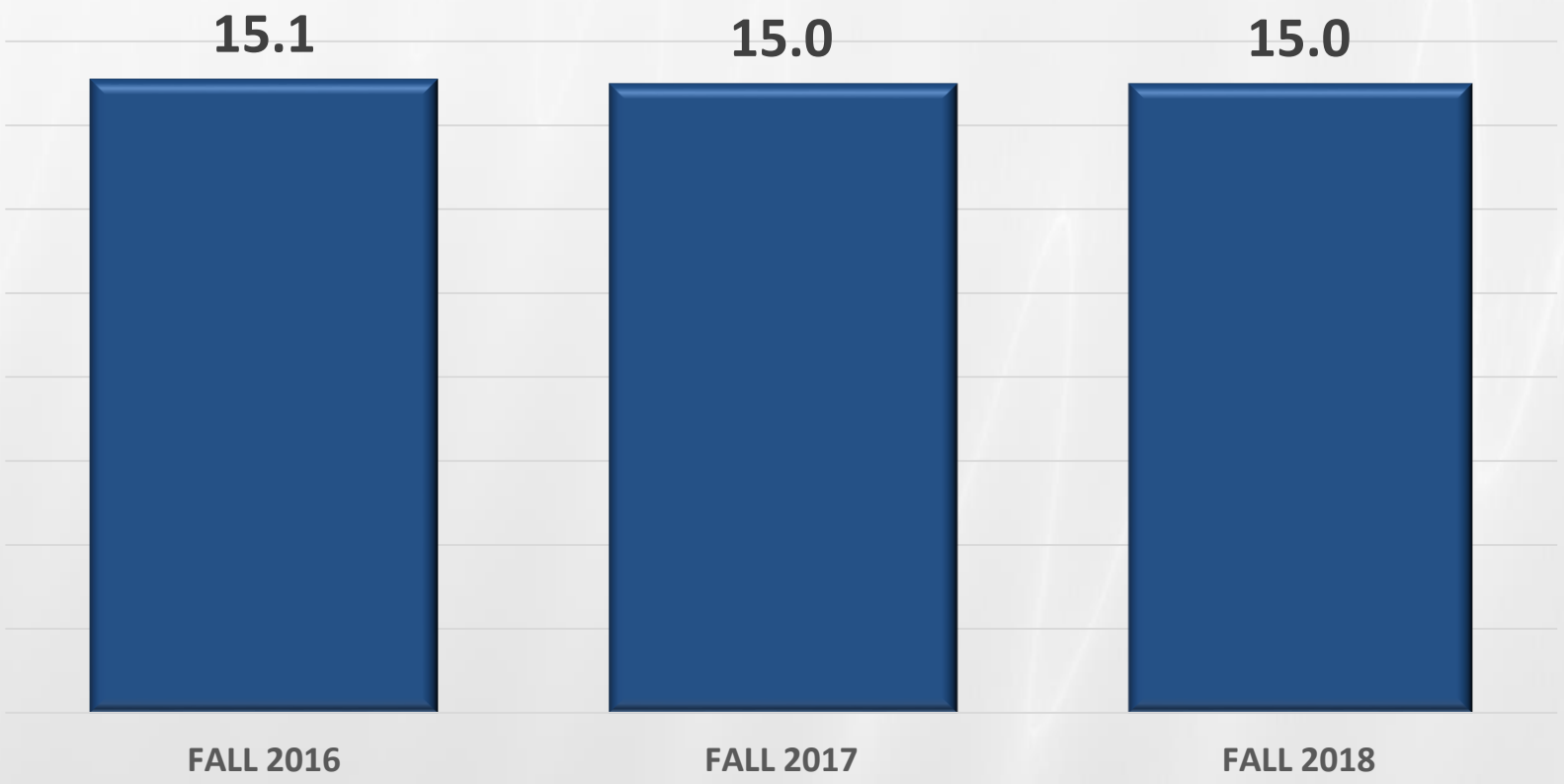
RADIO IS STRONG IN A FRAGMENTED MEDIA WORLD

Adults 18+ spend over 12 hours listening to radio each week

33:22	**12:20**	16:32	4:13	4:34	1:41	1:09
HR:MIN	**HRS:MIN**	HR:MIN	HR:MIN	HR:MIN	HR:MIN	HR:MIN
Live + Time-Shifted Television	**Radio**	App/Web on Smartphone	Time-Shifted Television	Internet on Computer	Game Console	Video on Computer

Source: Nielsen, Total Audience Report, Q1 2018 / Base: Total US Population P18+.

DESPITE FRAGMENTATION, THE RADIO AUDIENCE IN SOUTHERN CALIFORNIA REMAINS CONSISTENT



Source: Nielsen Regional Database, Fall 2016 - 2018, Monday – Sunday, 6a-Mid, Persons 12+ Weekly Cume.

REACH AND TIME

RADIO REACHES 90.3%

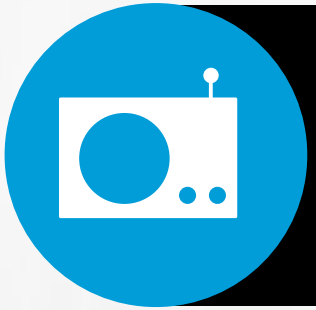
OF PERSONS 12+ IN SOUTHERN CALIFORNIA EVERY WEEK

9 HOURS

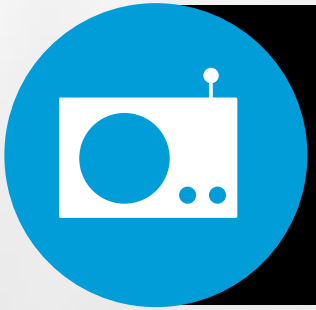
SPENT WITH RADIO EACH WEEK

Source: Nielsen Regional Database, Fall 2018, Monday - Sunday, 6a-mid, Persons 12+.

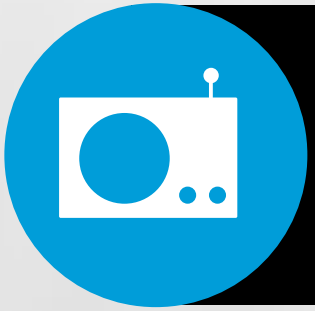
SCBA



90.3% OF SOUTHERN CALIFORNIANS ARE REACHED BY RADIO EACH WEEK



THAT'S **15 MILLION** LISTENERS



SPENDING **9 HRS** LISTENING EVERY WEEK

Source: Nielsen Regional Database, Fall 2018, Monday - Sunday, 6a-mid, Persons 12+.

nielsen

RADIO'S REACH EXTENDS ACROSS ALL MAJOR DEMOGRAPHICS IN SOUTHERN CALIFORNIA…

Weekly Radio Listeners

4.2 Million Listeners

87.9% of Millennials

use radio

MILLENNIALS

(18-34)

3.6 Million Listeners

93.1% of Gen X

use radio

GENERATION X

(35-49)

3.3 Million Listeners

92.5% of Boomers

use radio

BOOMERS

(50-64)

Source: Nielsen Regional Database, Fall 2018, Monday – Sunday, 6a-Mid.

…AND RADIO REACHES A DIVERSE AUDIENCE

Weekly Radio Listeners

Hispanics (12+)

6.6 Million Listeners

94.7%
of Hispanics use radio

AFRICAN AMERICANS (12+)*

1.0 Million Listeners

88.2%
of African Americans use radio

Source: Nielsen Regional Database, Fall 2018, Monday – Sunday, 6a-Mid.

"CONGESTION IS BACK TO ITS GROWTH PATTERN"

- The 8- to 10-year growing economy has brought traffic congestion to the highest measured levels in most U.S. cities.
- Employment was up by 1.9 million jobs from 2016 to 2017, slower growth than the 2.3+ million job growth in 4 of the previous 5 years, but substantial enough to cause congestion growth.
- In 2017, congestion wasted an enormous amount of time, fuel, and money. Urban Americans traveled an extra **8.8 billion hours** and purchased an extra **3.3 billion** gallons of fuel totaling **$166 billion**.
- The variation in congestion is often more difficult to deal with than the regular predictable back-up. To reliably arrive on time for important freeway trips, travelers had to allow **34 minutes** to make a trip that takes 20 minutes in light traffic.

Source: Texas A&M Transportation Institute and INRIX, *2019 Urban Mobility Scorecard*, August 2019.

There are over 18.5 million vehicles registered in SOUTHERN CALIFORNIA, over 700,000 in Oxnard/Ventura

Source: DMV, Total Vehicles Registered, September 2019 (Los Angeles, Orange, Riverside, San Bernardino, Ventura, Imperial, Kern, Santa Barbara, San Diego, and San Luis Obispo Counties).

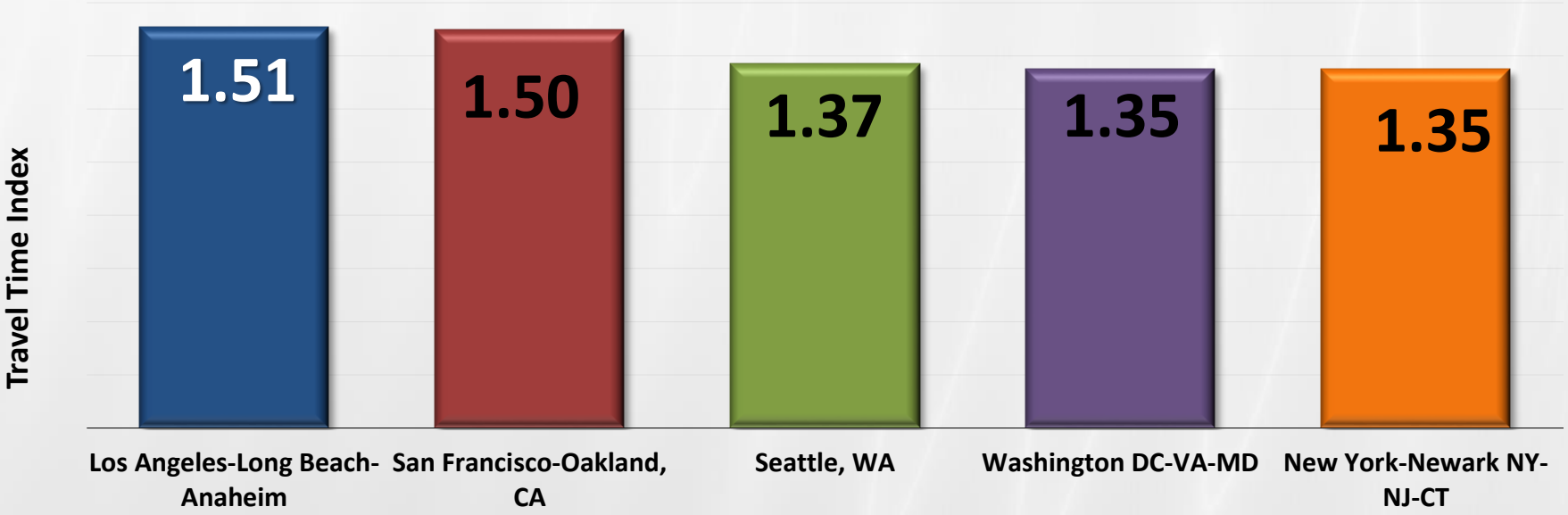
PEOPLE IN OXNARD/VENTURA DRIVE NEARLY 2 BILLION MILES PER YEAR.

The average peak traveler spends an extra 34 hours stuck in traffic each year, up 27 hours from 1982 when data was first collected.

Source: Texas A&M Transportation Institute and INRIX, *2019 Urban Mobility Scorecard*, August 2019.

MORE CONGESTION MEANS MORE TIME SPENT LISTENING TO RADIO IN CARS.

Oxnard/Ventura drivers spent **16%** more time on the roads than under normal conditions due to traffic congestion.

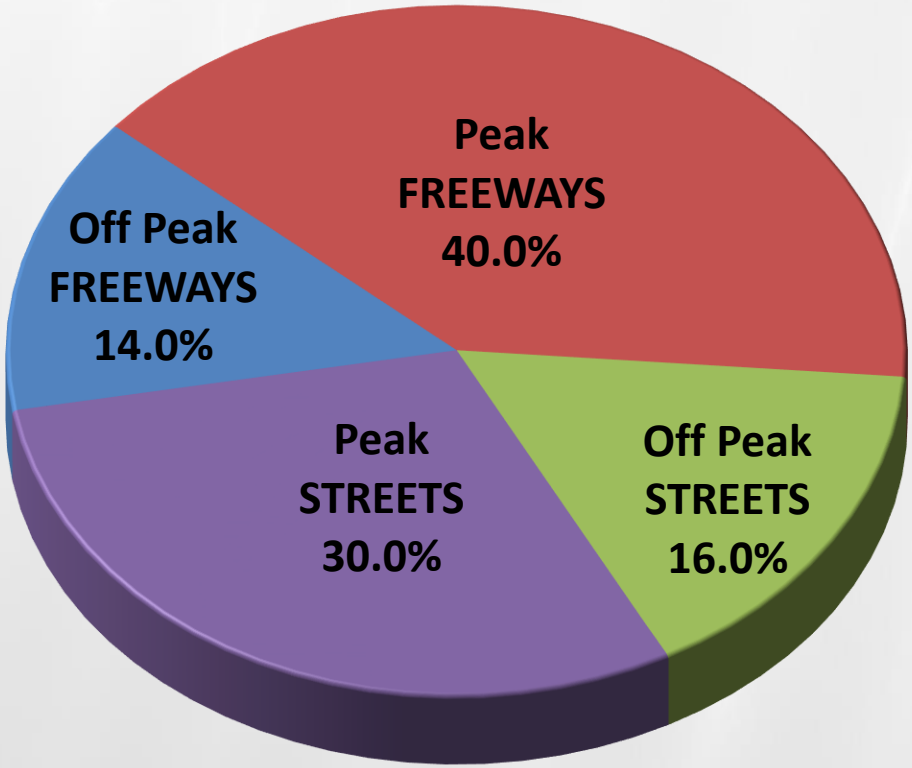


Travel Time Index – A measure of congestion that focuses on each trip and each mile of travel. It is calculated as the ratio of travel time in the peak period to travel time in free-flow. A value of 1.16 for Oxnard indicates that a 20-minute free-flow trip takes 23.2 minutes in the peak.

Source: Texas A&M Transportation Institute and INRIX, *2019 Urban Mobility Scorecard*, August 2019.

IN URBAN AREAS WITH POPULATION OVER 1 MILLION, APPROXIMATELY 54 PERCENT OF TRAVEL DELAY IS ON FREEWAYS

Percent of Delay
Road Type and Time of Day



Source: Texas A&M Transportation Institute and INRIX, *2019 Urban Mobility Scorecard*, August 2019, Travel Time Index Rank.

THE SHEER SIZE AND DENSITY OF SOUTHERN CALIFORNIA TRAFFIC

- The combined total population of New York, Chicago, Houston, Philadelphia, and Phoenix almost equals the **18.5 million** registered vehicles that make up Southern California Traffic.
  (Source: Census, 2018 Population Estimates (as of July 1, 2018) and DMV, Total Vehicles Registered, July 2019)
- Over **700 thousand** cars in the Ventura County. (Source: DMV, Total Vehicles Registered, July 2019)
- Imagine...18.5 million cars filled with potential new customers.
- The potential for more brand awareness and market share than 5 major cities combined!
- That's the value of **Southern California Radio**.

New York
8,398,748

Chicago
2,705,994

Houston
2,325,502

Philadelphia
1,584,138

Phoenix
1,660,272

Source: Census, 2018 Population Estimates (as of July 1, 2018).

12.3 MILLION

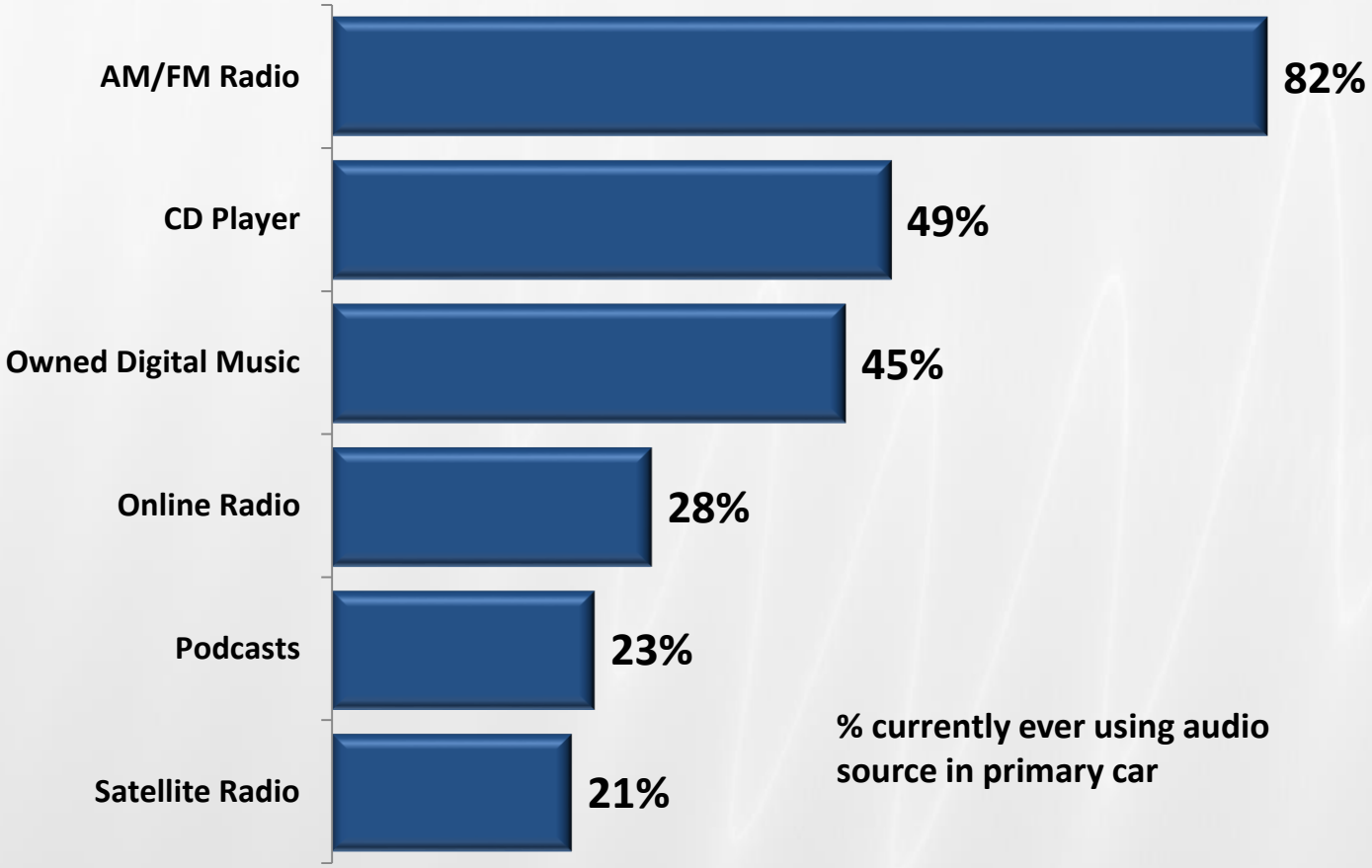
SOUTHERN CALIFORNIANS USE RADIO AWAY FROM HOME DURING COMMUTING HOURS

Source: Nielsen Regional Database, Fall 2018, Monday – Friday, 6a-10a + 3p-7p, Persons 12+.

82% of Adults 18+ who have driven/ridden in car cite RADIO as their primary in-car entertainment/info device

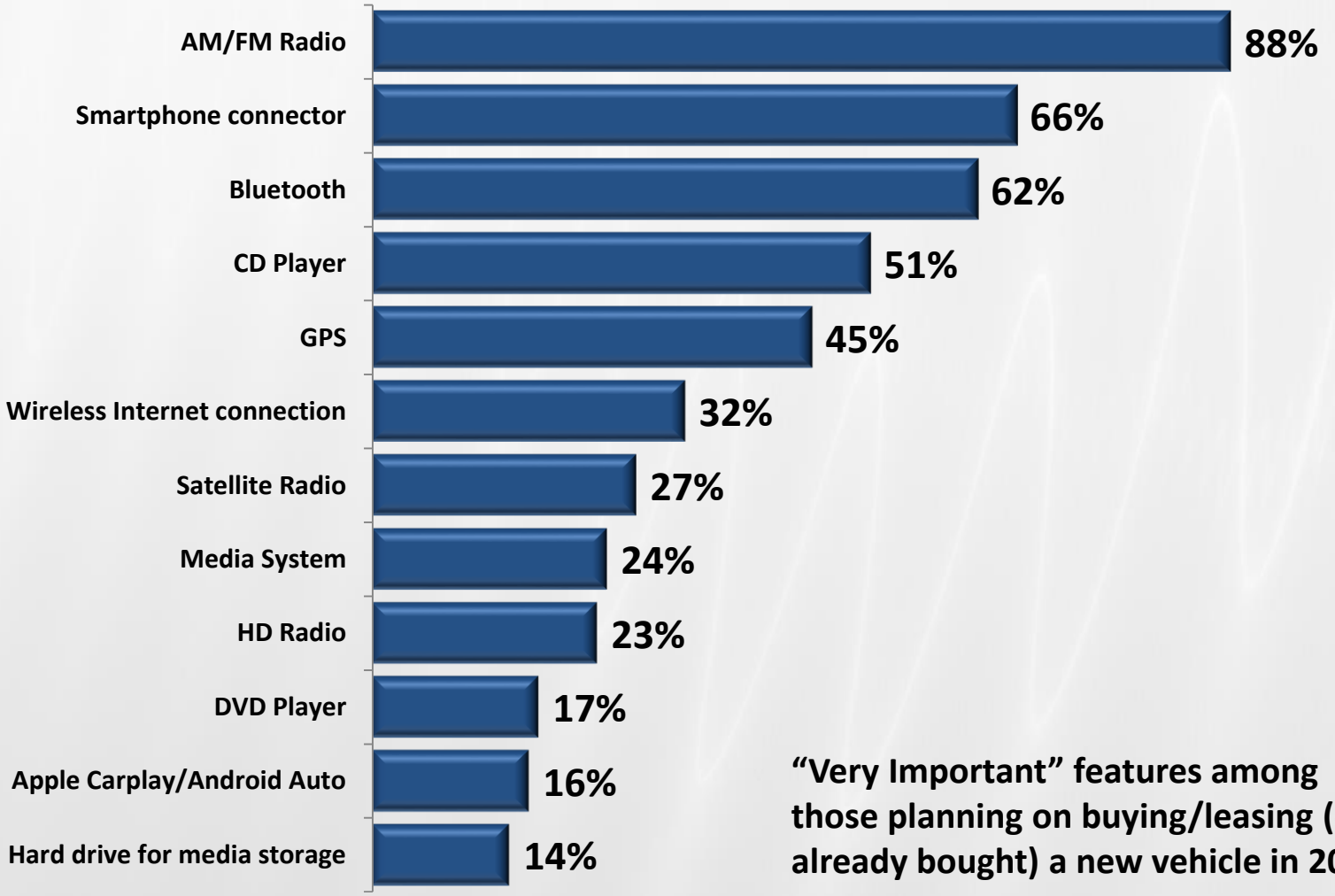
Source: The Infinite Dial © 2018 Edison Research and Triton Digital. Age 18+ and has driven/ridden in car in last month.

AUDIO SOURCES USED IN PRIMARY CAR



Source: The Infinite Dial © 2018 Edison Research and Triton Digital. Age 18+ and has driven/ridden in car in last month.

RADIO IS THE MOST IMPORTANT NEW CAR FEATURE

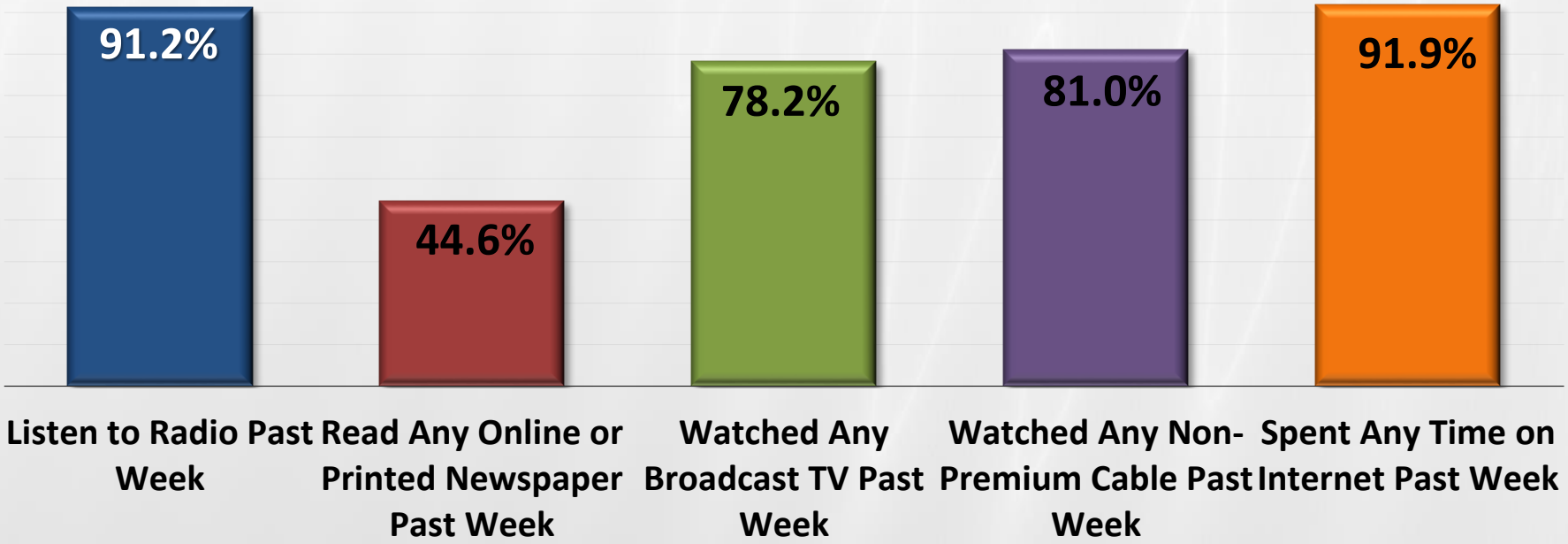


"Very Important" features among those planning on buying/leasing (or already bought) a new vehicle in 2016

Source: Jacobs Techsurvey 12, May 2016.
245 radio stations in U.S. & Canada, N=39,503, Interview dates: January 19 – February 22, 2016.

RADIO REACHES OXNARD/VENTURA
ADULTS 18+

Radio reaches 91.2% of Oxnard/Ventura Adults 18+



Source: Scarborough, R1 2019 (January 2018 - 2019), Oxnard/Thousand Oaks/Ventura CBSA.

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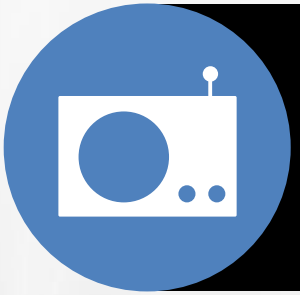
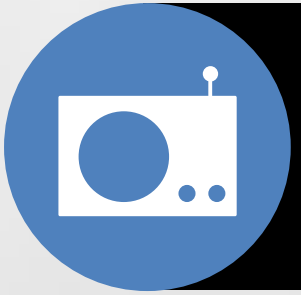


81% OF SOUTHERN CALIFORNIA RADIO LISTENERS ARE IN THE WORK-FORCE



THAT'S **8.5 MILLION** QUALIFIED CONSUMERS LISTENING EVERY WEEK

Source: Nielsen Regional Database, Fall 2018, Monday – Sunday, 6a-Mid, Persons 18-64.

RADIO'S EXPANSIVE DIGITAL REACH

Southern California Radio interacts with its listeners on-air and online:

- Huge Loyal and active listener databases
- Mobile Apps with geo-targeting by zip codes
- Streaming audio for PC and Mobile listening
- Rabid social network connection with Radio's on-air talent
- Web site interaction using couponing, product contests and special offers

facebook

RESOURCE REFERENCES

- Alan Burns & Associates/Triton Digital
  http://burnsradio.com/index.php?option=com_content&view=article&id=54&Itemid=60
- Census
- INRIX
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