

# Radio



## Summary :

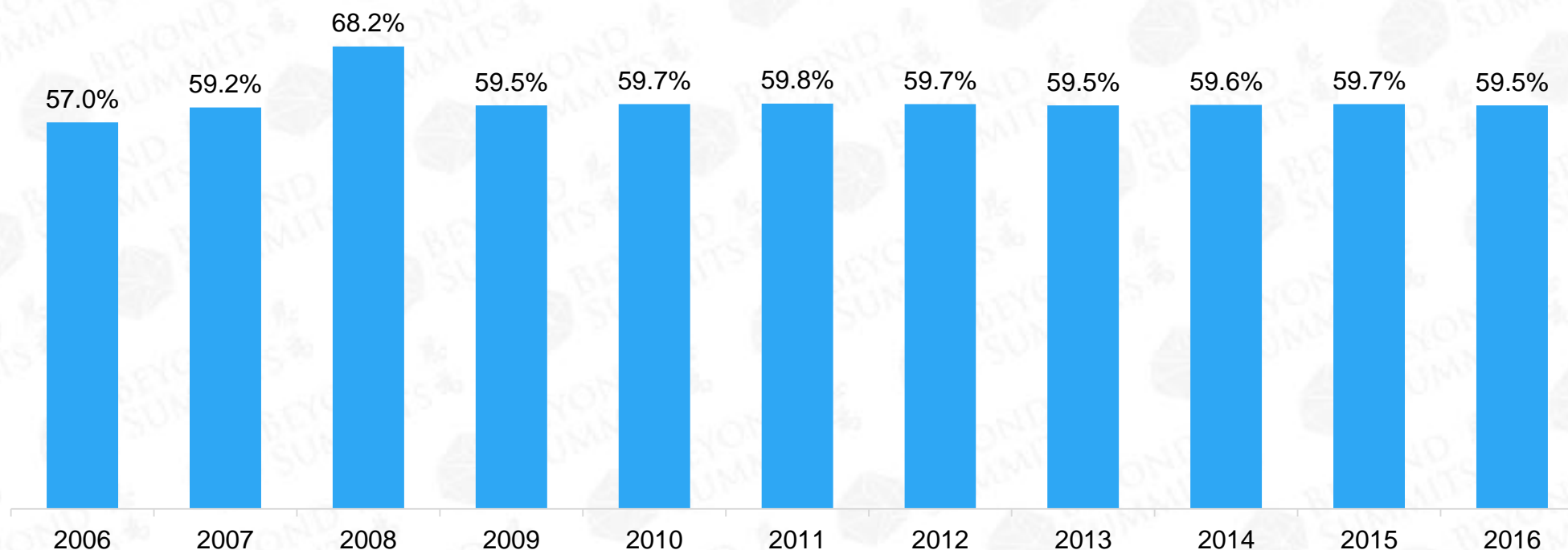
- In 2016, China's radio reach rate dropped slightly, at 59.5%. Based on the historical data, the enthusiasm of listeners listening to the radio has not been greatly reduced because of the involvement of other mass media. It was worth noting that the proportion of listening to radio at home continued to decline.
- In response to this, in the first half of 2017, it can be seen from the proportion of the entire listening volume that the listening time at home became shorter and shorter, while the listening time in the car increased.
- According to the data in the first quarter of 2017, radio audience's age in China was mainly between 35 to 44 and 25-34 years old, and the majorities were females. More than 85% of radio audience's education is senior high school and above.
- Provincial radio and city radio appeared to be more competitive and took up more than 90% share of total radio market in China.

## Summary :

- According to the data in the first quarter of 2017, the market share of traffic radio ranked the first among China's all radio programs, next came news and music radio.
- In 2017, radio advertising revenue continued to grow, and advertisement duration continued to decline, but the decline was lower than that of 2016. Life service programs were the focus of advertisers among all types of radio programs, which had absolute advantages.
- In 2017, brands that spent the most on radio advertising were mainly health care products, post and telecommunications, and transportation. Among them, the radio advertising spending of Hongmao Pharmaceutical Liquor increased the most, at more than 10 times.
- According to the forecast, the scale of China's mobile radio audience will exceed 300 million by 2019. With the gradual saturation of the market, the future growth rate will continue to slow down. Audience choose to listen to mobile FM to learn about news, information and knowledge because voice broadcast is more efficient than text.

China's radio reach rate increased for three consecutive years from 2006-2008. Since 2009, the rate had been maintained between 59.5%-60.0%, indicating that China's radio broadcasting industry still had quite an amount of loyal audience, and the enthusiasm of listeners listening to the radio has not been greatly reduced because of the involvement of other mass media.

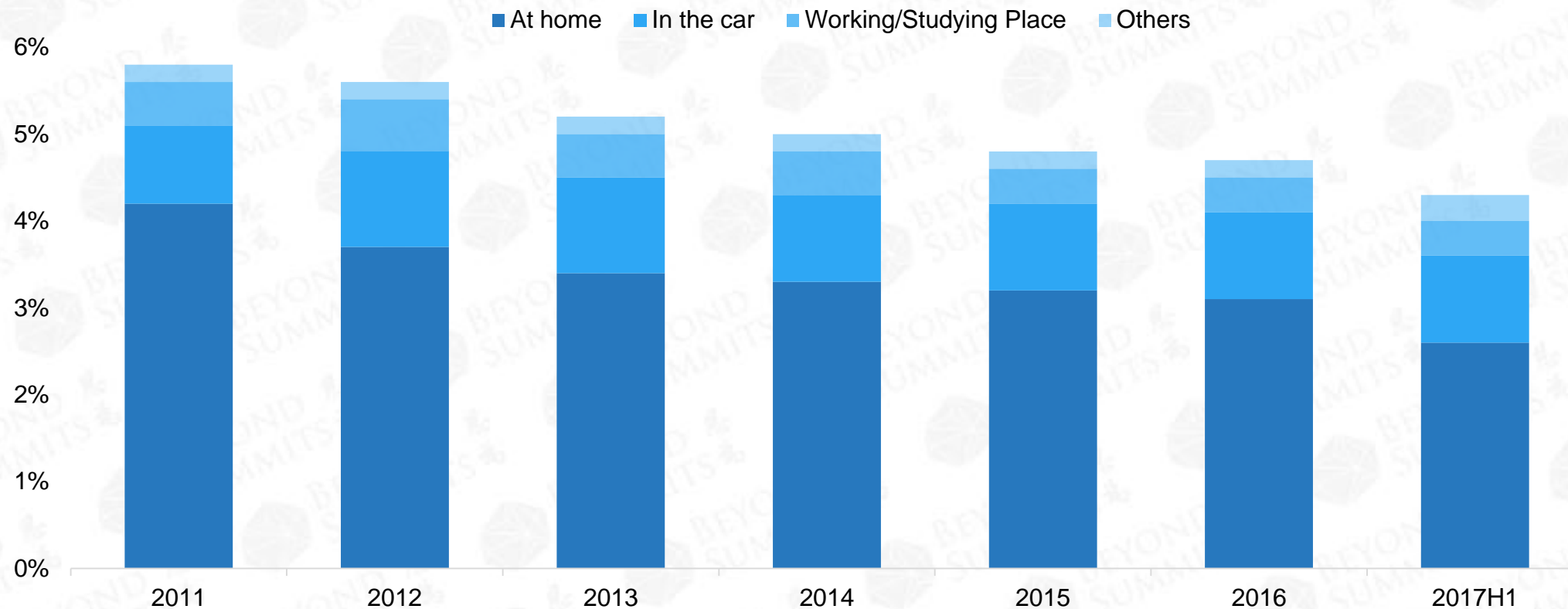
### 2006-2016 China's Radio Reach Rate



Source: Selection Market Research Group

In the first half of 2017, the audience rate was 4.15% during the whole day period, showing a quarter-on-quarter decline and a decrease of 13.4% from 2016. Among them, the home listening rate continues to fall.

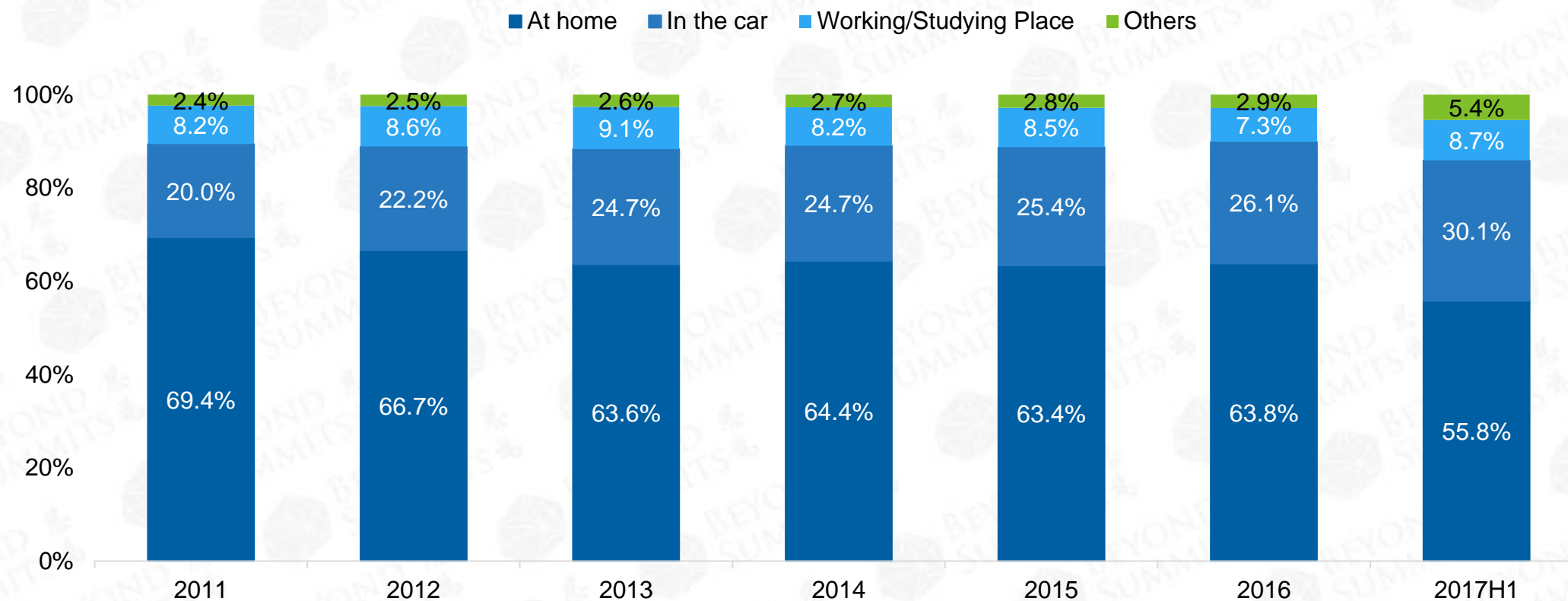
### Trend of Audience Rate in Various Place



Source: CSM

In the first half of 2017, it can be seen from the proportion of the entire listening volume that the listening time at home became shorter and shorter, while the listening time in the car increased.

### Proportion of Listening Time in Various Place



Source: CSM

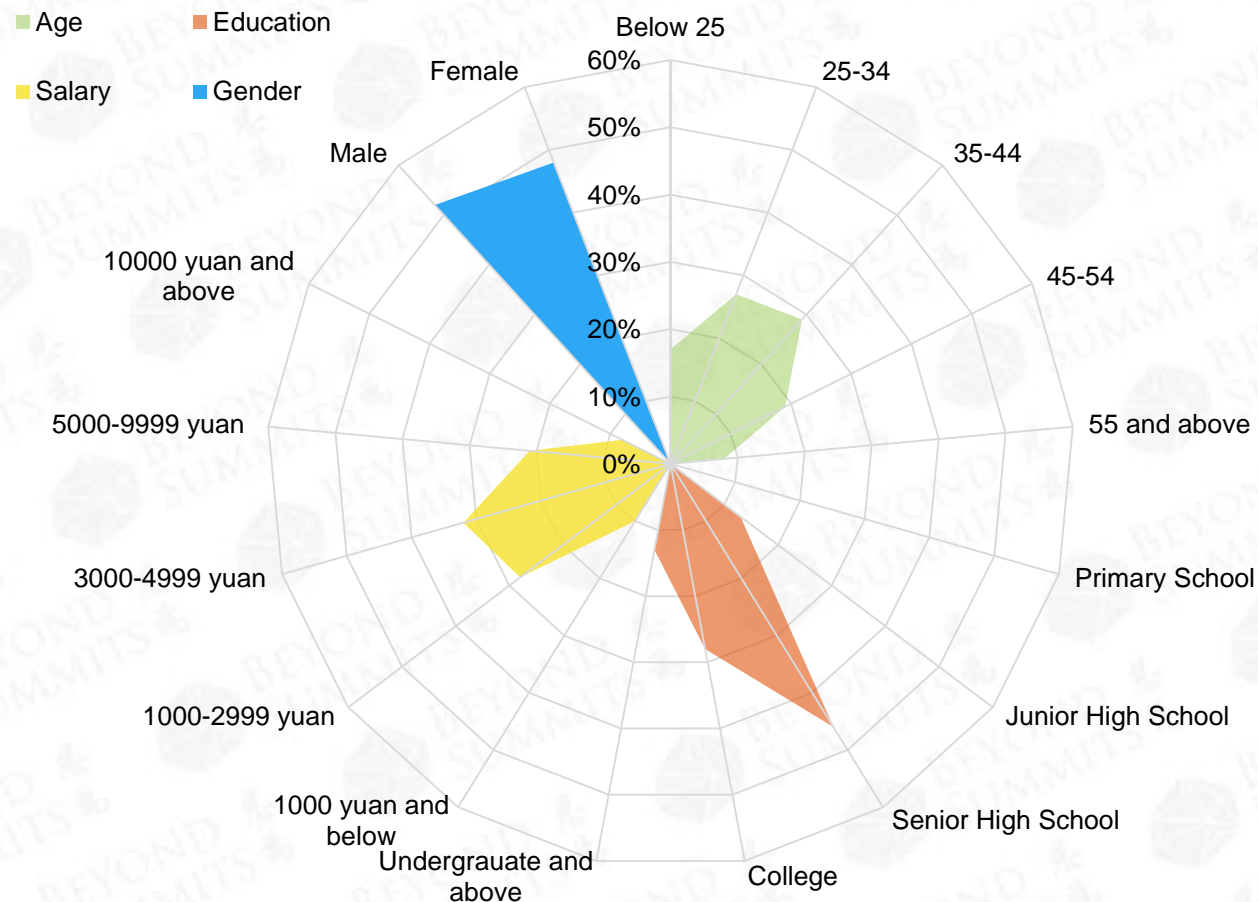
Demography of China's radio audience in 2017 Q1:

1. Age between 35 to 44 and 25-34 years old;
2. The majorities were females;
3. More than 85% of radio audience's education are senior high school and above.

Trends of China's radio audience in 2017 Q1:

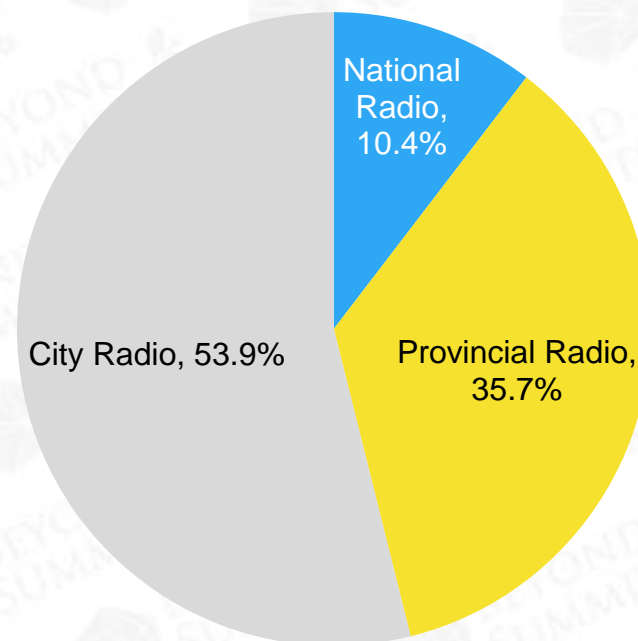
1. The radio audience tended to be younger
2. Shifting to middle and high income;
3. The distribution of educational background was more dispersed.

## 2017 Q1 China's Radio Audience Demography



Data in the first quarter of 2017 showed that provincial radio and city radio appeared to be more competitive and took up more than 90% share of total radio market in China.

### 2017 Q1 Market Share of China's Radio Industry

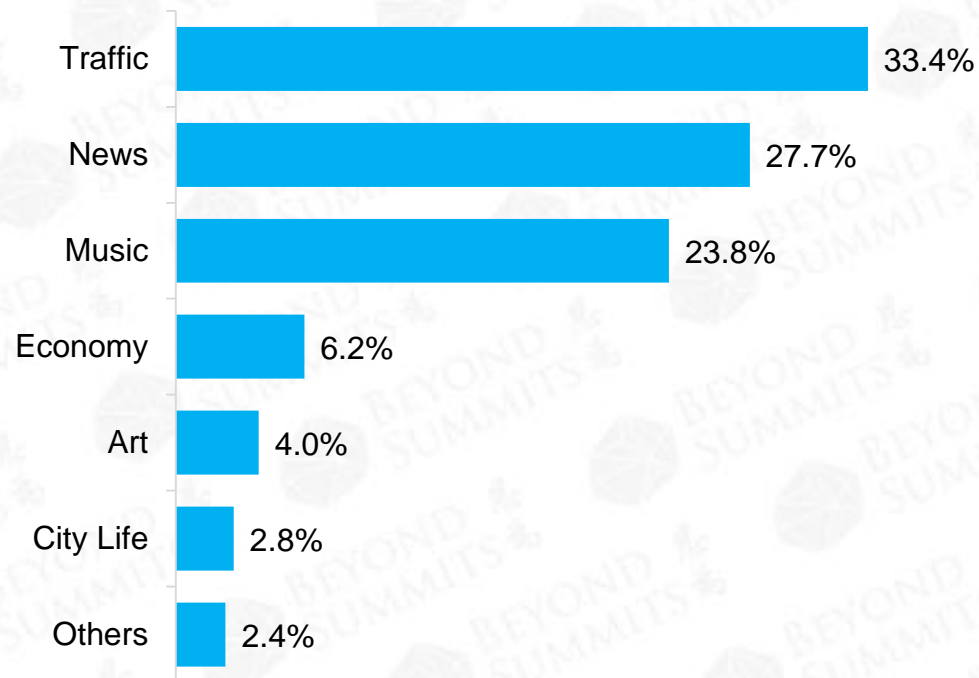


Source: CSM



In the first quarter of 2017, the market share of traffic radio ranked the first among China's all radio programs, next came news and music radio.

### 2017 Q1 Market Share of China's Radio Programs



Source: Selection Market Research Group

According to radio audiences' preferences, three kinds of programs are always welcomed by Chinese radio audiences: News, Music and Communication.

**Professional**

News radio stations attract more older male audiences with higher income and higher education.

**Young**

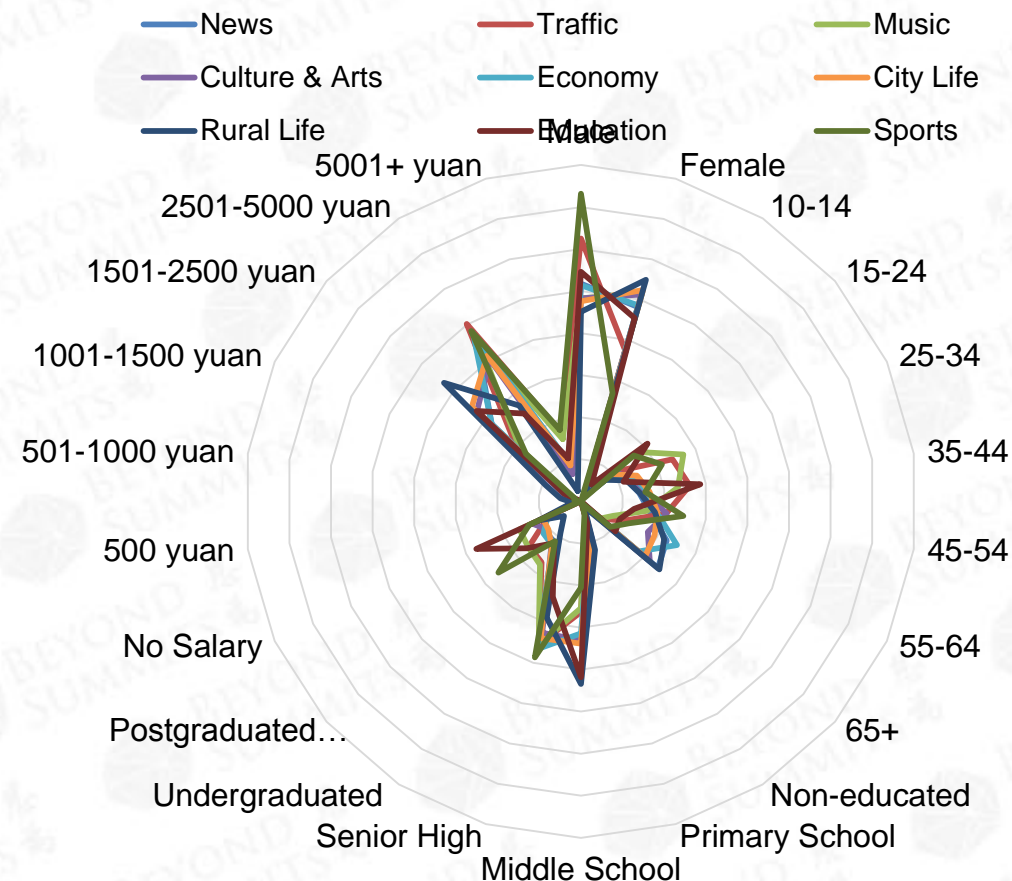
Music radio stations attract more younger audiences with higher education, longer time of listening, higher audience loyalty and wider reach.

**Common**

Communication radio stations meet the general needs of audience, so as to attract common audiences with different professions, income and education levels, making the audience attributes more multidimensional and broader.

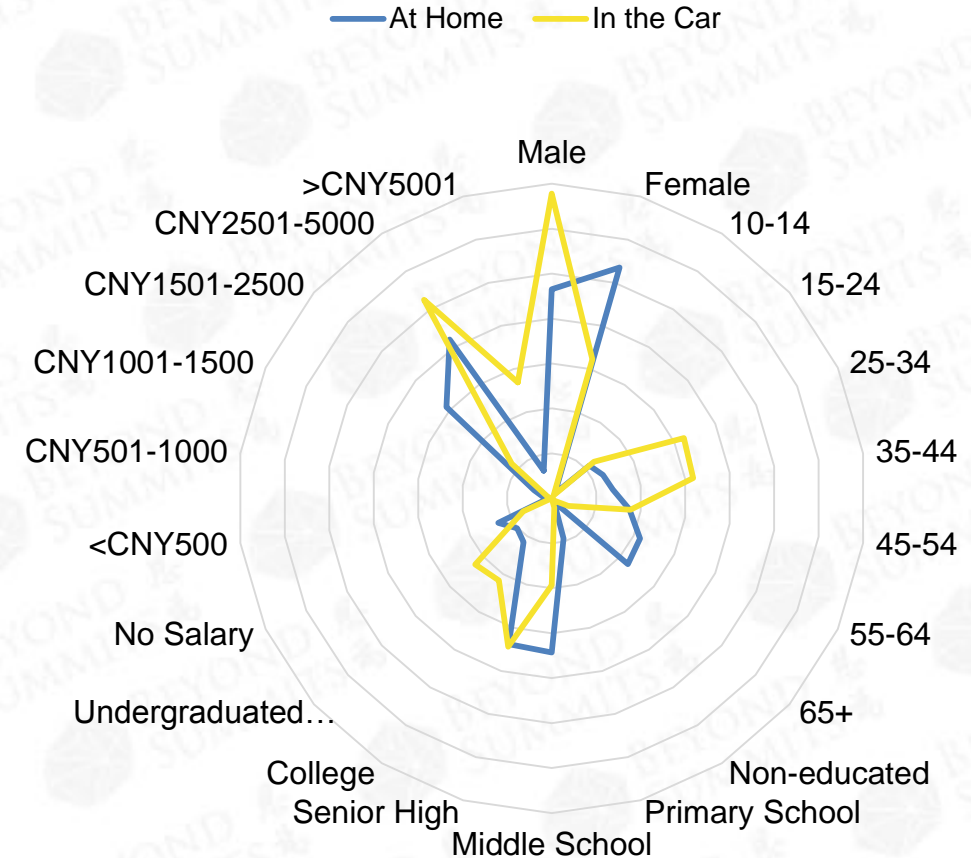
- News, traffic, economy, education and sports radio are welcomed mainly by male audience.
- Music, culture & arts, city life, rural life radio are popular among female audience.
- Middle-aged and the elder prefer news, economy and rural life programs.
- Young and middle-aged groups love traffic, music, city life, education and sports radio.
- Music is more preferred by young audience.
- Educated audience account the largest among the total audience of traffic, music, education and sports programs.

### CSM Audience Demography of 35 Cities by Category



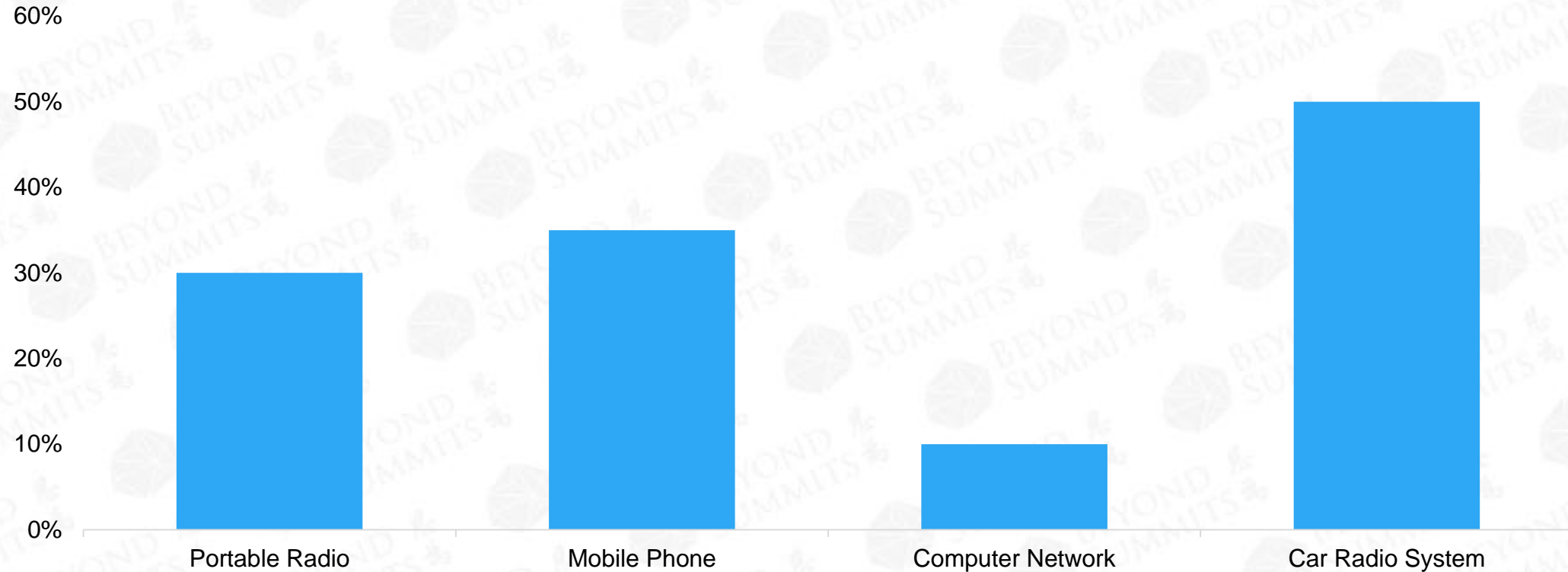
- Those who love to listen to the radio at home are mainly females at older age, with lower education level and lower income.
- Those who love to listen to the radio in their cars are mainly males at middle/young age, with higher education level and higher income.
- Audience in the car have become the target group for the radio broadcasting.

### CSM Audience Demography of 35 Cities (At Home/In the Car)



In the first quarter of 2017, the use rate of the car radio system was the highest among all types of radio terminals, reaching about 50%.

**2017 Q1 Use Rate of Radio Terminal**



Source: Selection Market Research Group

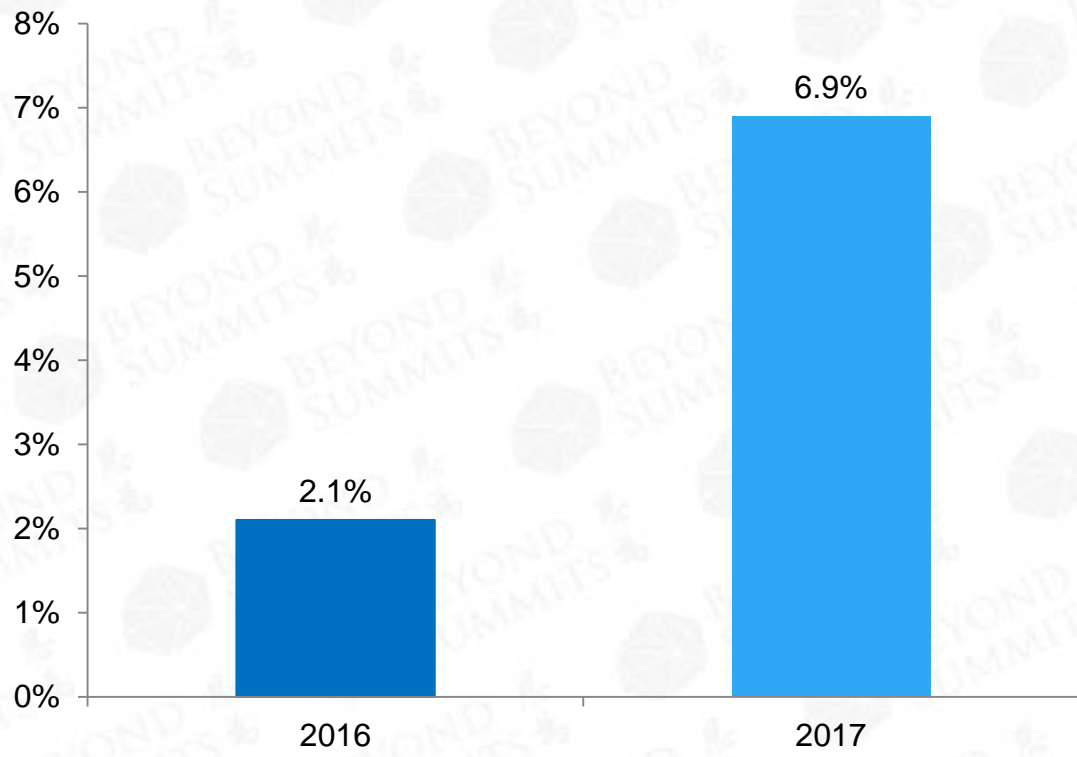
## China's Radio for Broadcasting in 2016 TOP10

Rank	Radio	Score
1	CNR-1	84.54
2	Hebei Traffic Radio FM99.2	75.58
3	CNR-China Business Radio	73.89
4	Tianjin Traffic Radio FM106.8	73.64
5	Music Radio ( CNR-3 )	70.77
6	Tianjin Radio	67.93
7	Hangzhou Traffic Radio FM91.8	64.61
8	Hebei Music Radio FM102.4	64.32
9	Voice of Zhejiang FM88	63.80
10	CNR-you Radio FM101.8	58.57

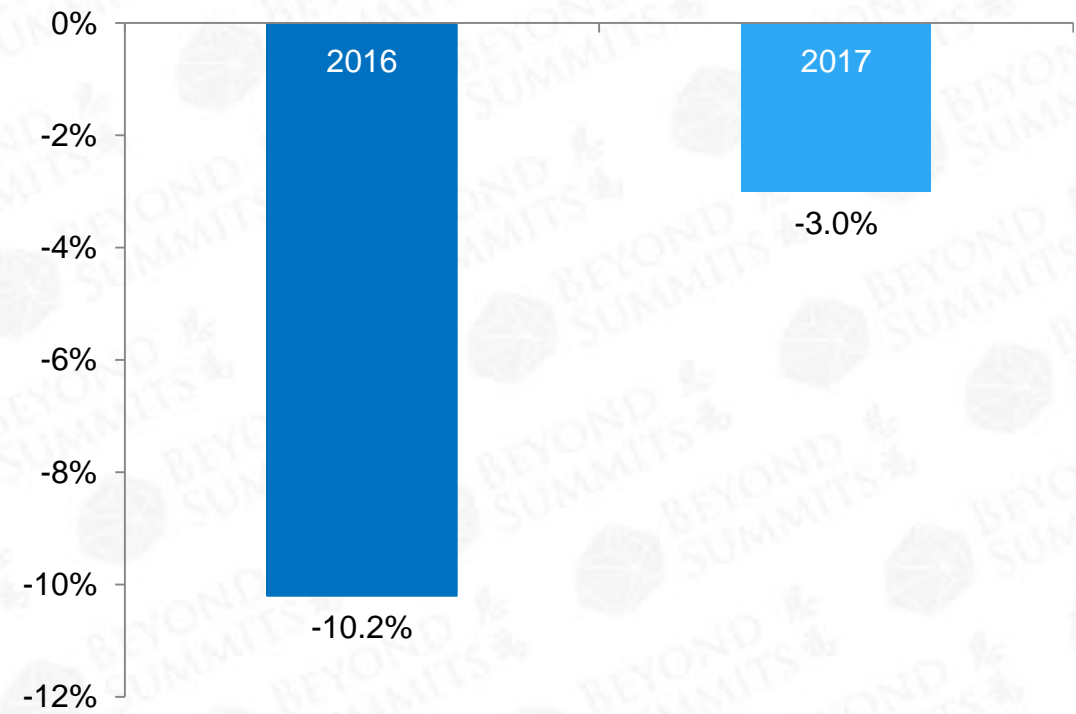
Source: People's network Research Institute

In 2017, radio advertising revenue continued to grow, and advertisement duration continued to decline, but the decline was lower than that of 2016.

**Growth Rate of Radio Advertising Revenue in 2017**



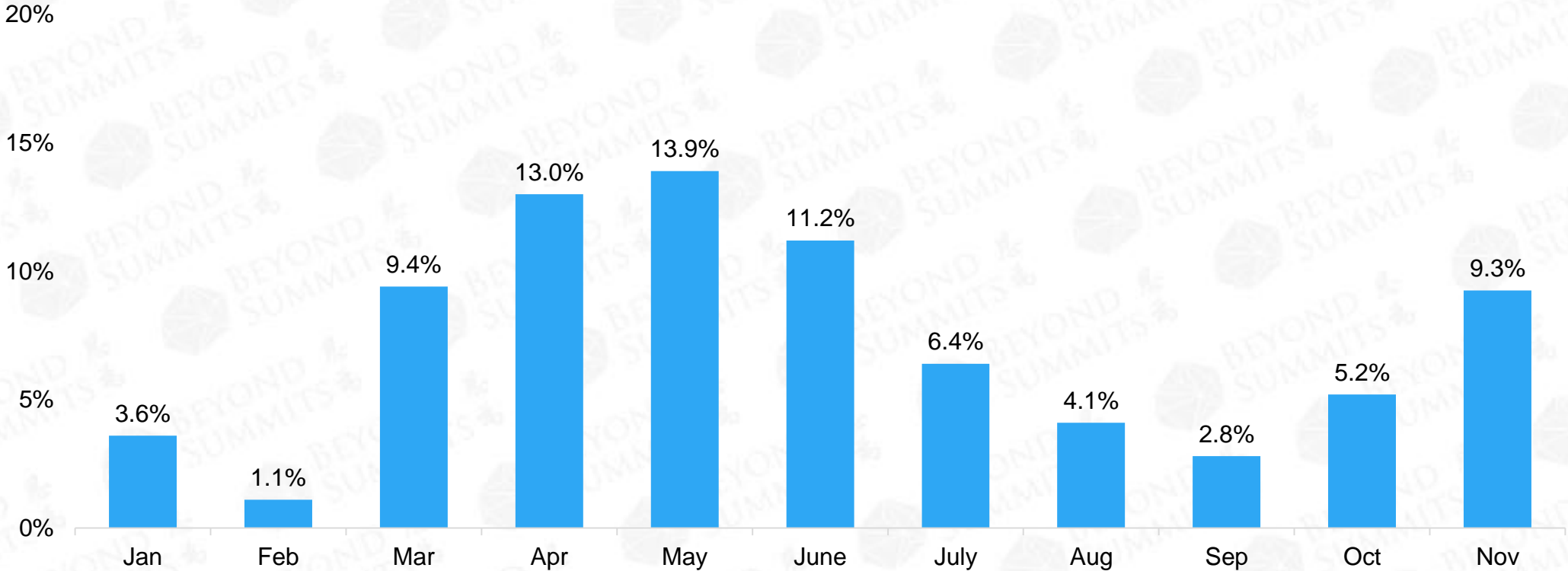
**Growth Rate of Radio Ad Duration in 2017**



Source: CTR Market Research

From January to November in 2017, the monthly growth of radio advertising fluctuated, with the biggest increase in May, followed by April.

### Monthly Growth of Radio Advertising in 2017

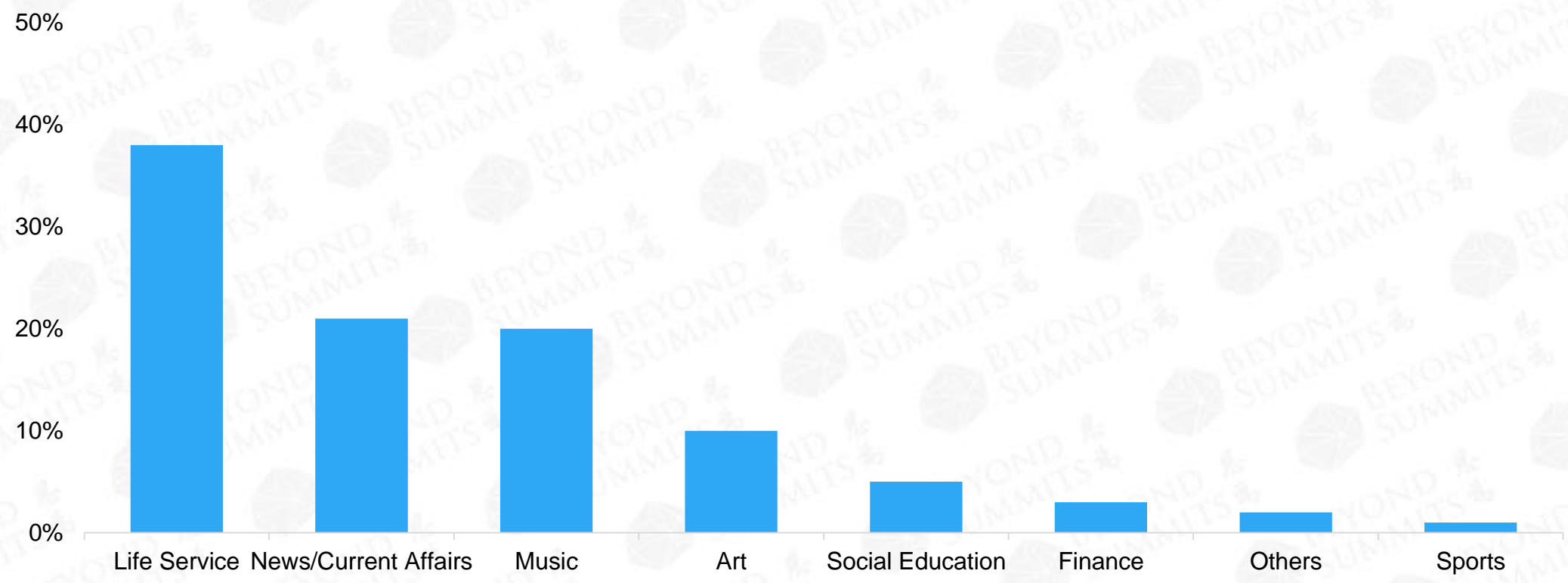


Source: CTR Market Research



In the first half of 2016, life service programs were the focus of the advertisers among all types of radio programs, which had absolute advantages.

### Share of Expenses in Different Radio Programs in 2016 H1



Source: CTR Market Research

## 2017.11 TOP 10 Radios in Advertising Spending

Ranking	Radio Station
1	CNR-1 ( FM106.1 )
2	CNR-China Music Radio ( CNR-3 FM90.0 )
3	CNR-China Business Radio ( CNR-2 FM96.6 )
4	Hit FM 88.7
5	CNR-China Art Radio ( CNR-9 FM106.6 )
6	HIT FM87.9
7	China Traffic Radio ( FM99.6 )
8	CRI EZFM ( FM91.5 )
9	Golden Radio ( CNR-4 FM101.8 )
10	CRI News Radio ( FM107.1 )

Source: CTR Market Research

## 2017.11 TOP 10 Radio Programs in Advertising Spending

Ranking	Radio Station	Program
1	CNR-1 ( FM106.1 )	CNR-China News
2	CNR-1 ( FM106.1 )	Evening Rush CNR-China News
3	CNR-1 ( FM106.1 )	Newsline
4	CNR-China Music Radio ( CNR-3 FM90.0 )	Morning Music
5	CNR-1 ( FM106.1 )	The Moment
6	CNR-China Business Radio ( CNR-2 FM96.6 )	World Finance & Economics
7	CNR-1 ( FM106.1 )	Global Chinese Broadcasting
8	CNR-China Music Radio ( CNR-3 FM90.0 )	NEWS UPDATE
9	CNR-China Music Radio ( CNR-3 FM90.0 )	Metropolis Music
10	Hit FM 88.7	HIT MORNING SHOW

## Growth Rate of TOP 5 Industries' Spending in Radio in 2017 H1

### Business and Service Industry

Category	Growth Rate in 2017 H1
Retail Service	-7.2%
Medical/Health care Institutions	17.8%
Business and Service Industry-others	185.4%
Education/Training	8.5%
Lawyer Firm	233.1%

### Transportation

Category	Growth Rate in 2017 H1
Vehicle	2.6%
Motor Related Service	40.7%
Transportation-Corporate Image	22.0%
Transportation Service	50.5%
Transportation-others	-59.3%

## Growth Rate of TOP 5 Industries' Spending in Radio in 2017 H1

### Post and Telecommunications

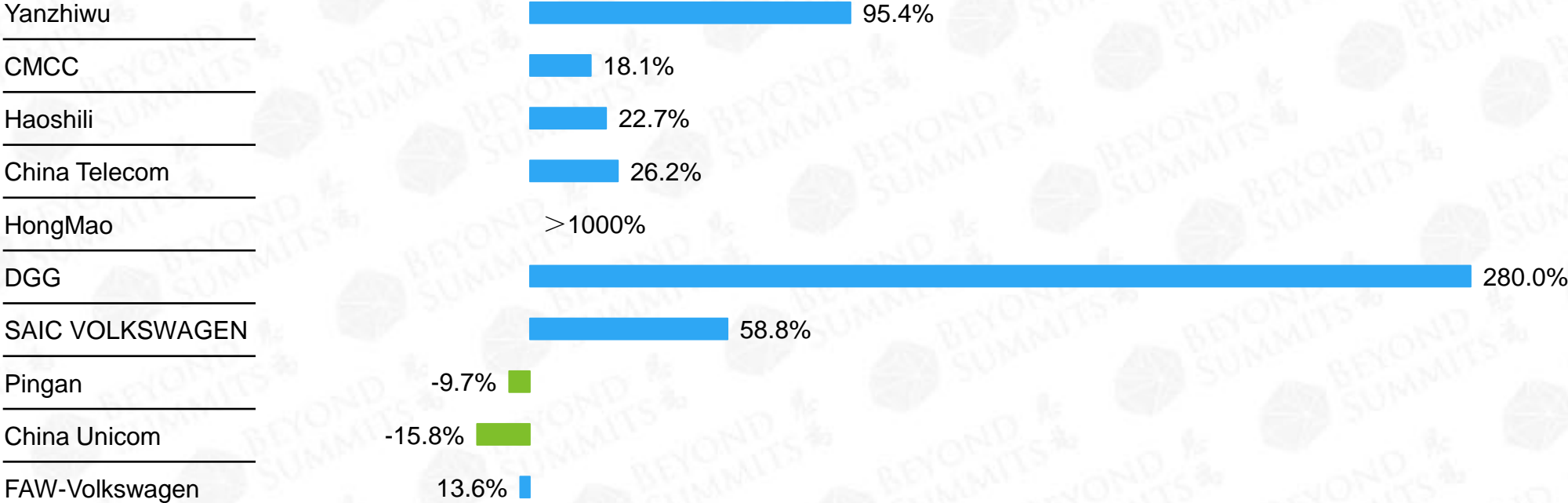
Category	Growth Rate in 2017 H1
Website	25.1%
Mobile Internet Service	-6.0%
Whole Network Service	34.7%
Data Multi-media Service	4.2%
Enterprise Image of Telecom Operators	151.5%

### Financial Industry

Category	Growth Rate in 2017 H1
Insurance	-10.7%
Bank Service	27.3%
Bank	1.5%
Financial Industry-Corporate Image	-25.3%
Bank Card	-25.0%

In 2017, brands that spent the most on radio advertising were mainly health care products, post and telecommunications, and transportation. Among them, the radio advertising spending of HongMao Pharmaceutical Liquor increased the most, at more than 10 times.

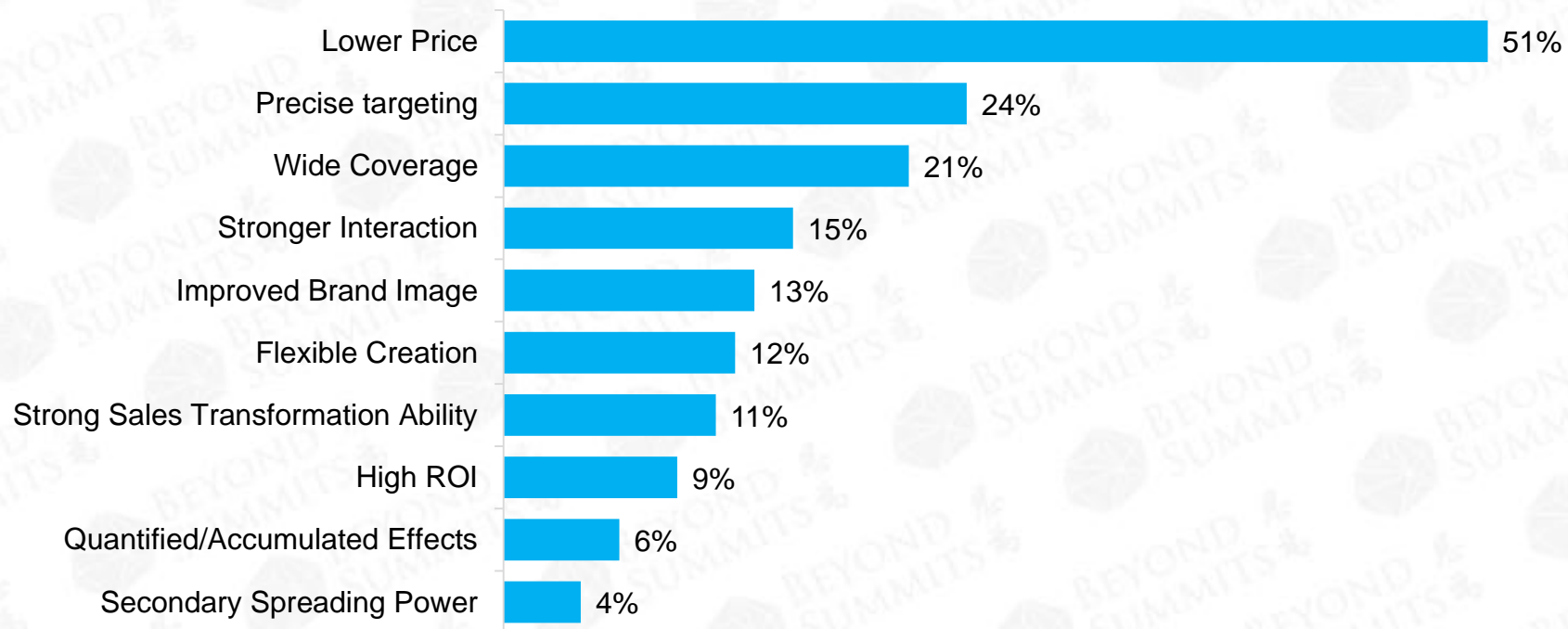
**Top 10 Brands That Spent the Most on Radio Ad and the Growth Rate (2017 VS 2016)**



Source: CTR Market Research

2016 Advertiser Marketing Trend Survey showed that, advertisers preferred radio advertising to other traditional media because of its lower price, precise targeting and stronger interaction.

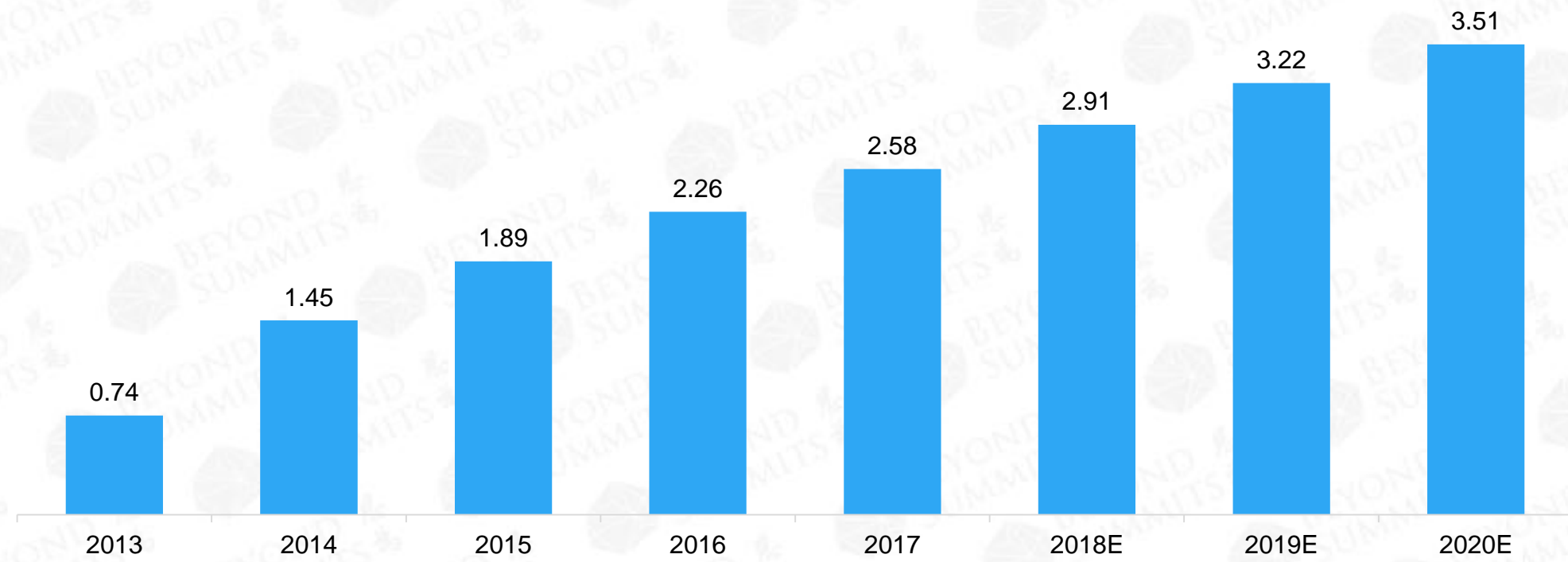
### Advantages of Radio Ads in 2016



Source: CTR Market Research

According to the forecast, the scale of China's mobile radio audience will exceed 300 million by 2019. With the gradual saturation of the market, the future growth rate will continue to slow down.

### Scale of China's Mobile Radio Users

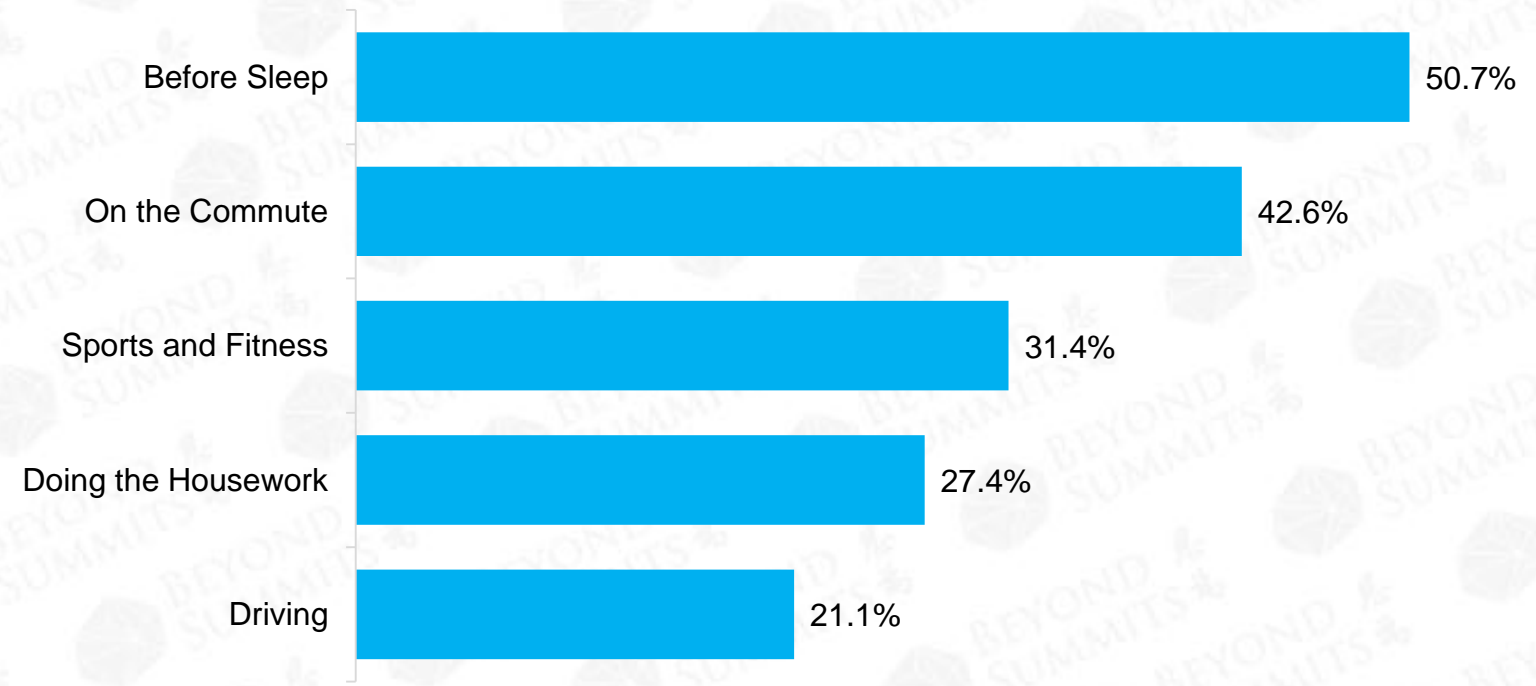


Source: soontooinstitute



Mobile radio usually takes up users' time fragments. More than half of the mobile radio users listened to FM radio before going to bed, next came the commute time.

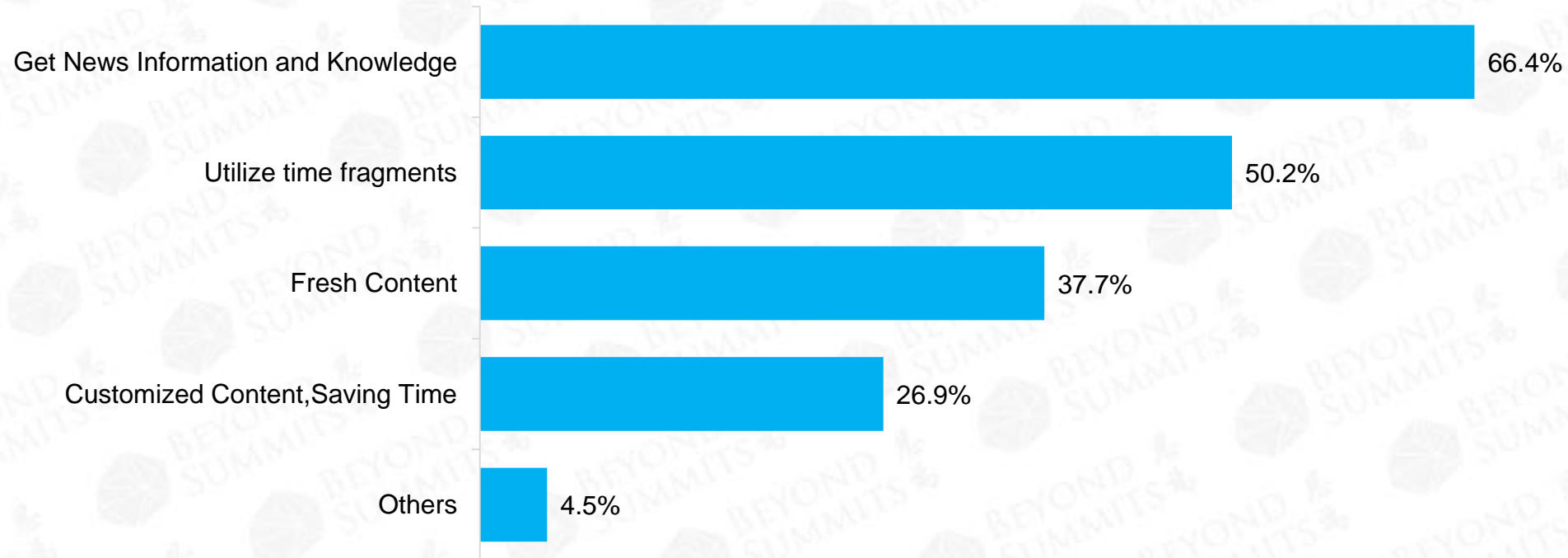
### Time When Users Listened to Mobile FM Radio in 2017



Source: soontooinstitute

Audience choose to listen to mobile FM to learn about news, information and knowledge because voice broadcast is more efficient than text.

### Factors that Users Prefer Mobile FM Radio



Source: soontooinstitute

## TOP 10 Radio FM APP in 2016

Rank	APP	Weekly Active Penetration	Weekly Opening Times Per person
1	Himalayan FM	1.43%	15.4
2	LRTS	0.53%	26.5
3	Qingting FM	0.40%	15
4	QQ FM	0.21%	27.6
5	Kuwo FM	0.14%	19.8
6	Lizhi FM	0.08%	23
7	O2ting	0.06%	35.3
8	Kaola FM	0.03%	8.2
9	Ifeng Diantai	1.00%	16.3
10	Douban FM	0.40%	8.1

Source: China Report Network Data Center

Beijing: Beijing Traffic Radio had the highest market share of 21.4%, much higher than other radios.

### SMR Audience Rating of Beijing, Oct. 2017

Region	Ranking	Radio	Audience Rate	Market Share
Beijing	1	Beijing Traffic Radio	1.83%	21.4%
	2	Beijing Music Radio	0.88%	10.3%
	3	Beijing News Radio	0.84%	9.9%
	4	Voice of China	0.79%	9.3%
	5	Beijing Art Radio	0.53%	6.3%

Source: SMR

Shanghai: Competition in the radio market in Shanghai is mainly found in local radio stations. Nearly 96% of radio stations in Shanghai are local ones, of which the Top 5 audience rating radio stations are related to music, news, and transportation.

### SMR Top 5 Audience Rating of Shanghai, Oct. 2017

Region	Ranking	Radio	Audience Rate	Market Share
Shanghai	1	Shanghai Pop Music Radio FM101	0.99%	16.6%
	2	Shanghai News Radio AM 990	0.72%	12.1%
	3	Shanghai Traffic Radio	0.69%	11.5%
	4	Shanghai East Radio FM899	0.60%	10.0%
	5	Shanghai Pop Music Love Radio	0.57%	9.5%

Shenzhen: The top 5 audience rating radio stations in Shenzhen all belong to local stations, some of which especially served car drivers.

### SMR Audience Rating of Shenzhen, Oct. 2017

Region	Ranking	Radio	Audience Rate	Market Share
Shenzhen	1	Shenzhen Traffic Radio	1.11%	17.6%
	2	Shenzhen Music Radio	0.99%	15.8%
	3	Shenzhen News Radio	0.77%	12.2%
	4	Shenzhen Life Radio	0.72%	11.4%
	5	Shenzhen URADIO	0.41%	6.5%

Source: SMR

Chongqing: Chongqing's radio market was dominated by local radio stations, and the Top 3 most listened radio stations were Chongqing Traffic Radio, voice of Chongqing and Chongqing Music radio, with the market share accounting for 66.9% of the total.

### SMR Audience Rating of Chongqing, Oct. 2017

Region	Ranking	Radio	Audience Rate	Market Share
Chongqing	1	Chongqing Traffic Radio	1.58%	24.1%
	2	Voice of Chongqing	1.41%	21.5%
	3	Chongqing Music Radio	1.39%	21.3%
	4	Chongqing City Radio	0.68%	10.3%
	5	Chongqing Economy Radio	0.50%	7.6%

Source: SMR



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