



Audio today 2022



How America listens

June 2022





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Nielsen Audio

If you see a nail in the road, pick it up

Let's say you're taking a stroll around the neighborhood and you find a little piece of rusted nastiness. Do you step over it and keep on going? Or do you take a second to toss it in the trash? Chances are, you'd pick it up. It's the decent thing to do, right? You don't want it buried in your car tire, but you also don't want to leave it for an unsuspecting neighbor's tire (or foot) to find either. At a foundational level, that's evidence of the SOCIAL CONTRACT we have with one another. It's the code of basic decency we try to live by as members of a functioning society. Businesses have an obligation to respect the social contract just like the rest of us. Individually and collectively, we try to do a little good with our time here – or at least avoid making things worse.

'Media' has been in the media a lot lately

Remember when the internet promised to usher in an era of democratized truth and knowledge? That promise has fallen a bit short. Ironically termed, "social" media has stretched the fabric of our *social contract* to a tearing point. Trust is in very short supply these days. Decency has become optional. Truth is a relic. All while your most embarrassingly intimate personal information is curated, catalogued, and auctioned off to the highest bidder.

Traditional Media – society's cornerstone

In contrast with digital media counterparts, AM/FM Radio Broadcasters have a legacy of being steadfast custodians of the *social contract*. Evidence can be found at your local high school football games, during weather events, charity food drives, etc. Radio (and TV) operators tirelessly serve their communities out of a tradition of responsibility – but also because they are beholden to the federal government. The Federal Communications Commission (FCC) provides a backstop to the social contract. It mandates Radio and TV operators serve the public interest. Unlike digital, it's not the wild west. Broadcasters are bound by rules that govern their license. A Radio or TV broadcast license isn't yours forever. You get to keep it as long as you uphold community standards.

"Marketers returning to 'Traditional Media'" says *Harvard Business Review*

Advertisers are waking up to the social responsibility of their media choices. Traditional media (Broadcast Radio and TV) are regarded as credible, trustworthy, cost effective, contextually relevant safe-havens for marketers. The programming keeps people glued to the content with great storytelling, emotional connections, music, humor, news, traffic, weather and more. The public seems to agree with the value proposition. In fact, AM/FM Radio continues to be the #1 ad-supported reach medium in America today. No kidding.

Enjoy this latest edition of our *Audio Today* report series for more information about Radio's appeal with consumers in 2022.

Bottom line

Advertisers have to step up and start accepting some responsibility for the content behind the CPM. The advertising media vehicle you choose is no longer just a business decision. It's a moral decision. Make the right choice. Use your head, and your heart.

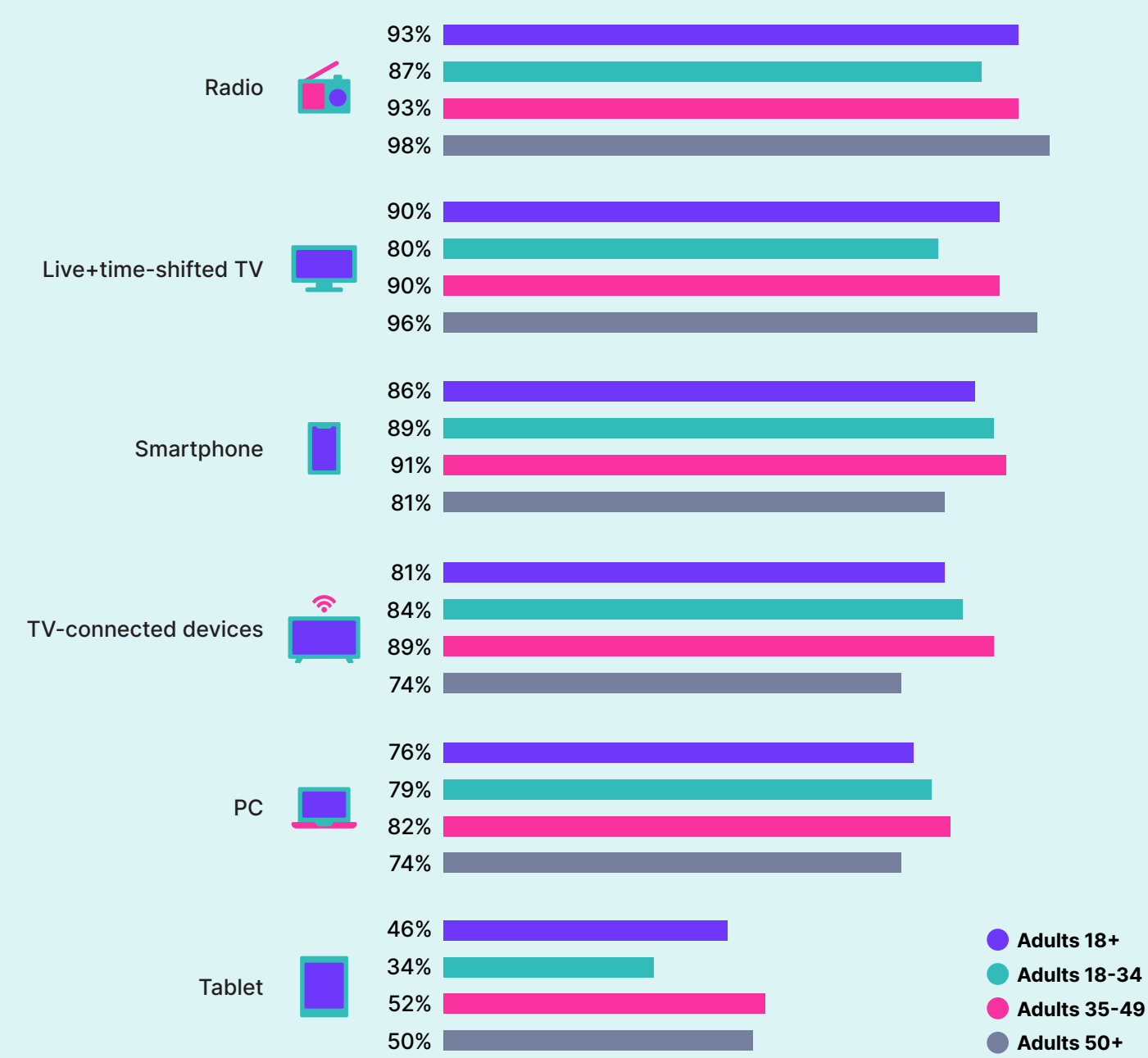
Be Well,

A stylized, handwritten signature of Brad Kelly in black ink.

Comparing monthly reach

U.S. monthly reach

Percent of population



Source: Nielsen NPOWER, Nielsen RADAR, Nielsen Total Media Fusion - Q4 2021



Radio continues to reach more Americans every month than any other platform, linear or digital

Monthly reach % among U.S. population

	Black 18+	Black 18-34	Black 35-49	Black 50+
Radio	93%	88%	92%	98%
Live+time-shifted TV	91%	83%	93%	97%
Smartphone	85%	87%	90%	81%
TV-connected devices	80%	82%	87%	75%
PC	72%	74%	81%	64%
Tablet	39%	32%	43%	42%

	Hispanic 18+	Hispanic 18-34	Hispanic 35-49	Hispanic 50+
Radio	97%	93%	98%	99%
Live+time-shifted TV	86%	79%	89%	94%
Smartphone	88%	90%	91%	82%
TV-connected devices	81%	83%	86%	74%
PC	67%	73%	70%	58%
Tablet	42%	35%	51%	44%

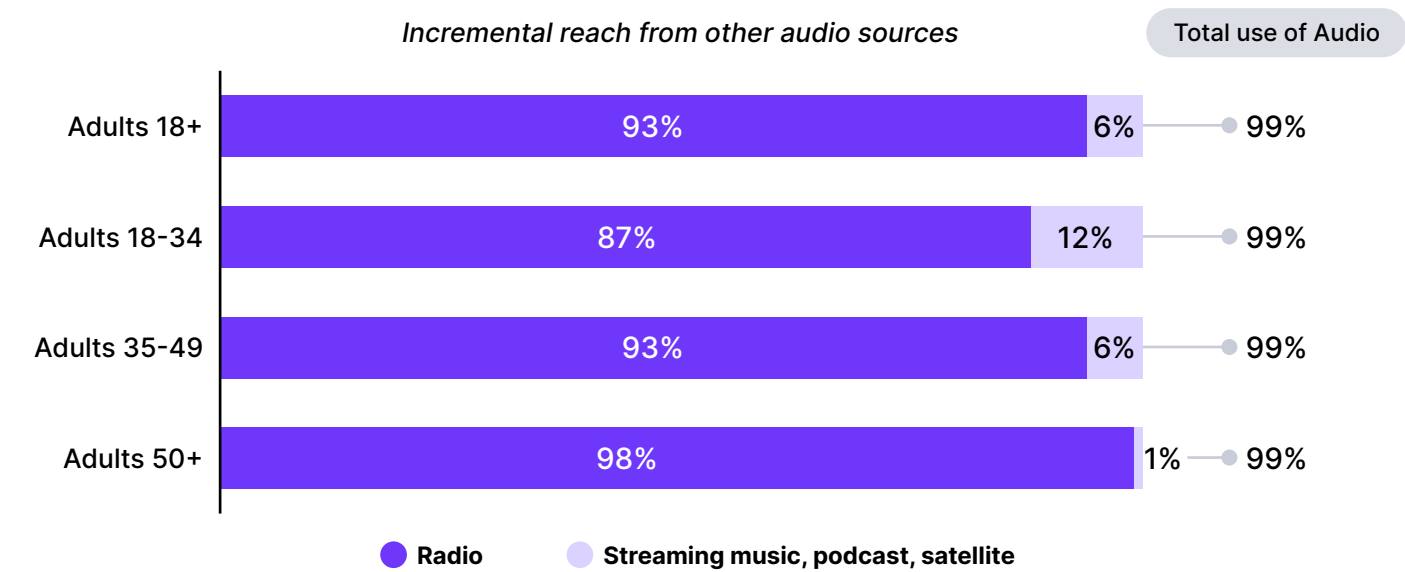
Radio is the center of the total audio universe



As audio becomes an even more important part of our media diets, the total amount of consumption is nearly ubiquitous. Radio – the original ad-supported medium – alone reaches 93% of the U.S. population. When you include the unduplicated audience from ad-supported as well as ad-free streaming music services along with podcasts and satellite radio, the reach rises to 99%.

Total use of audio

Monthly reach % among U.S. population



Source: Nielsen RADAR, Nielsen Scarborough - Q4 2021



Radio’s monthly reach is **93%**



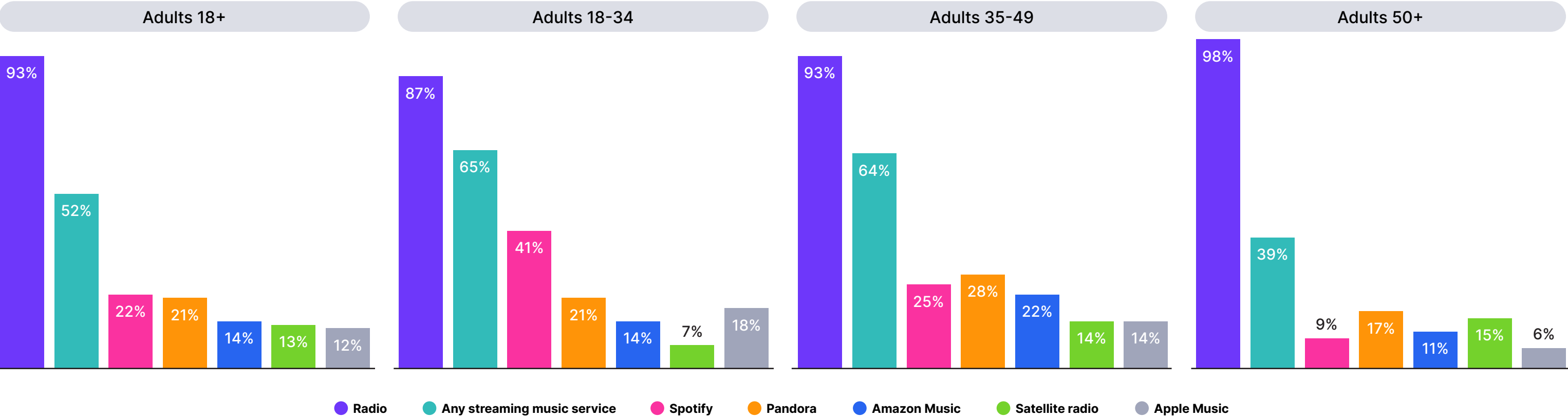
Streaming music, podcasting and satellite radio’s combined monthly reach is **60%**



Radio generates **55%** more incremental reach when added to an audio marketing plan

In the audio universe, only AM/FM radio can deliver the scale advertisers need

Monthly reach % among U.S. population



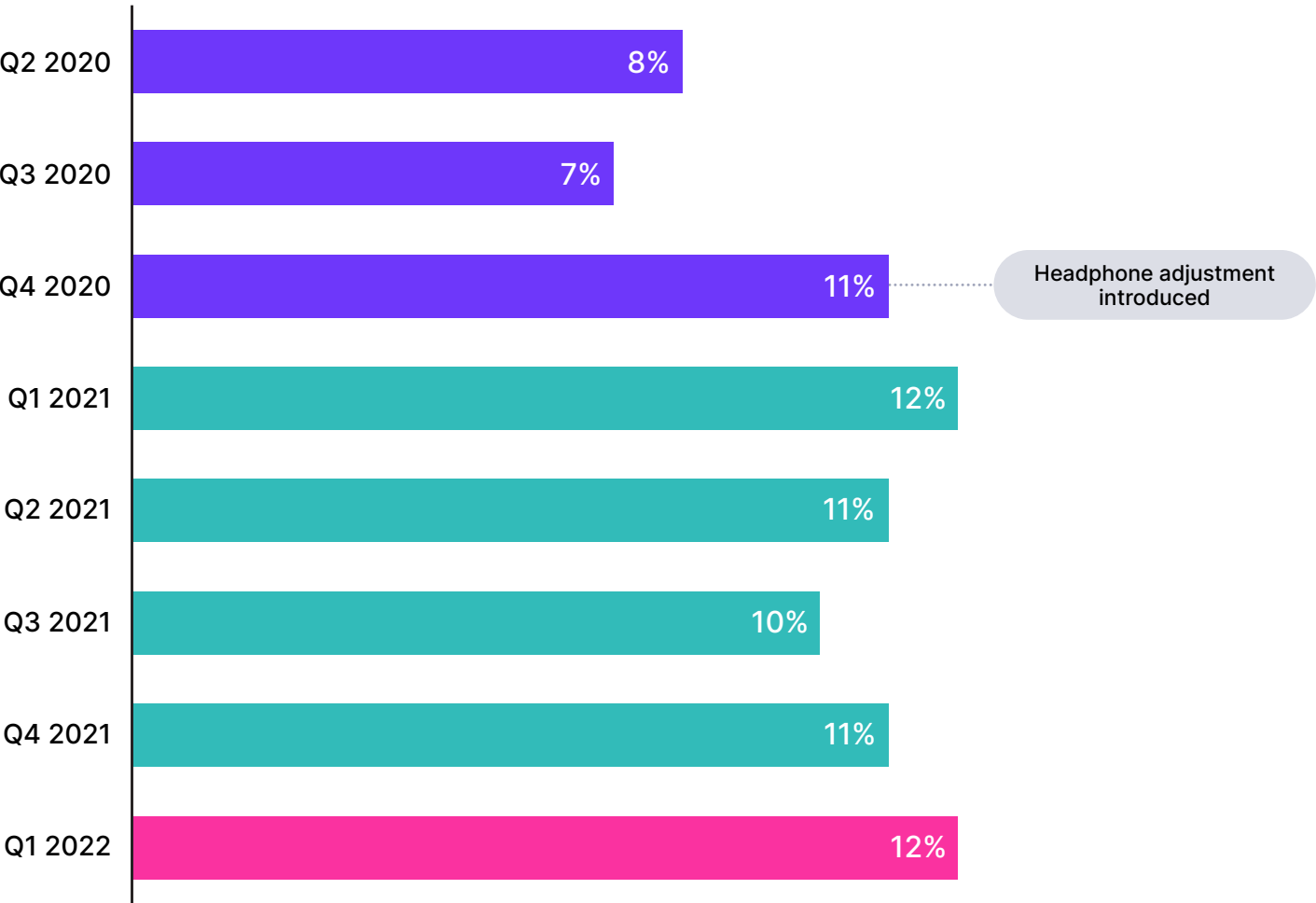
Source: Nielsen RADAR, Nielsen Scarborough - Q4 2021

A growing percentage of the radio audience is streaming

Over the past few years, a larger percentage of total Radio AQH is coming from digital streams.

Percent of total AQH from encoded streams

Adults 25-54



Source: Nielsen PPM Markets, Total Week, Persons 25-54



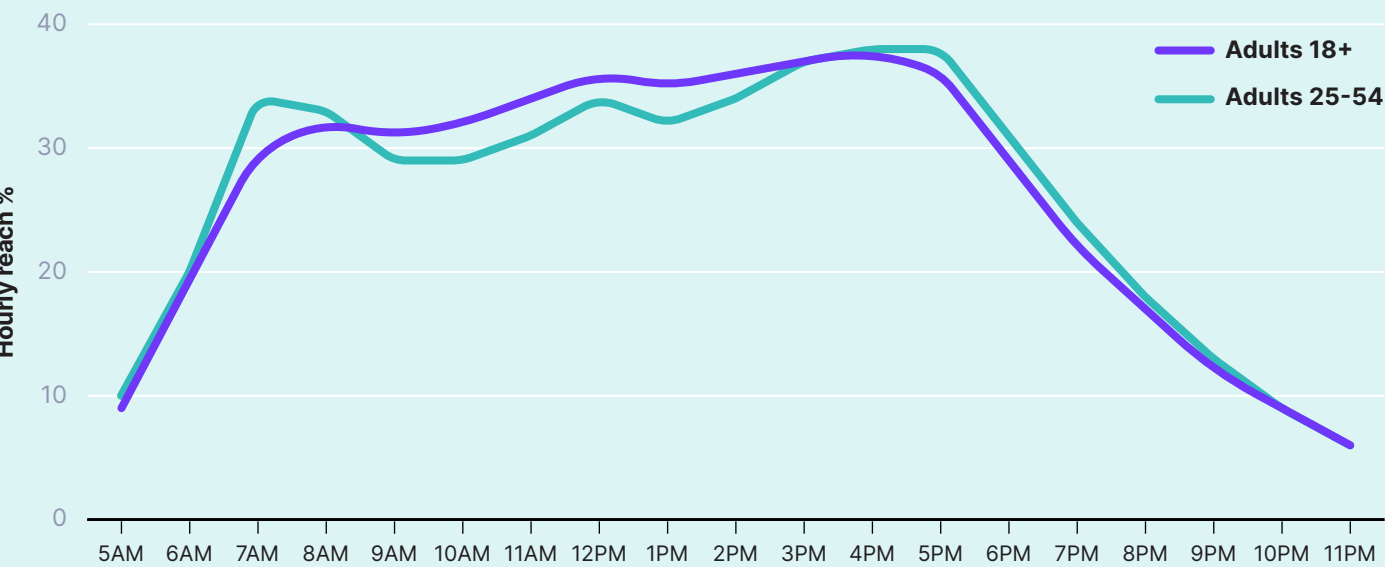


Radio use spans the bulk of the day, reaching consumers on the path to purchase while they're away from home and in the car

A daily companion for millions, radio is a particularly effective medium for advertisers due to its legacy of reaching listeners during the prime hours of the day while they are out of home and closest to the point of purchase (commuting, working, shopping). And with time in vehicles on the rise after several years of pandemic disruption, radio continues to be the primary audio source in the car.

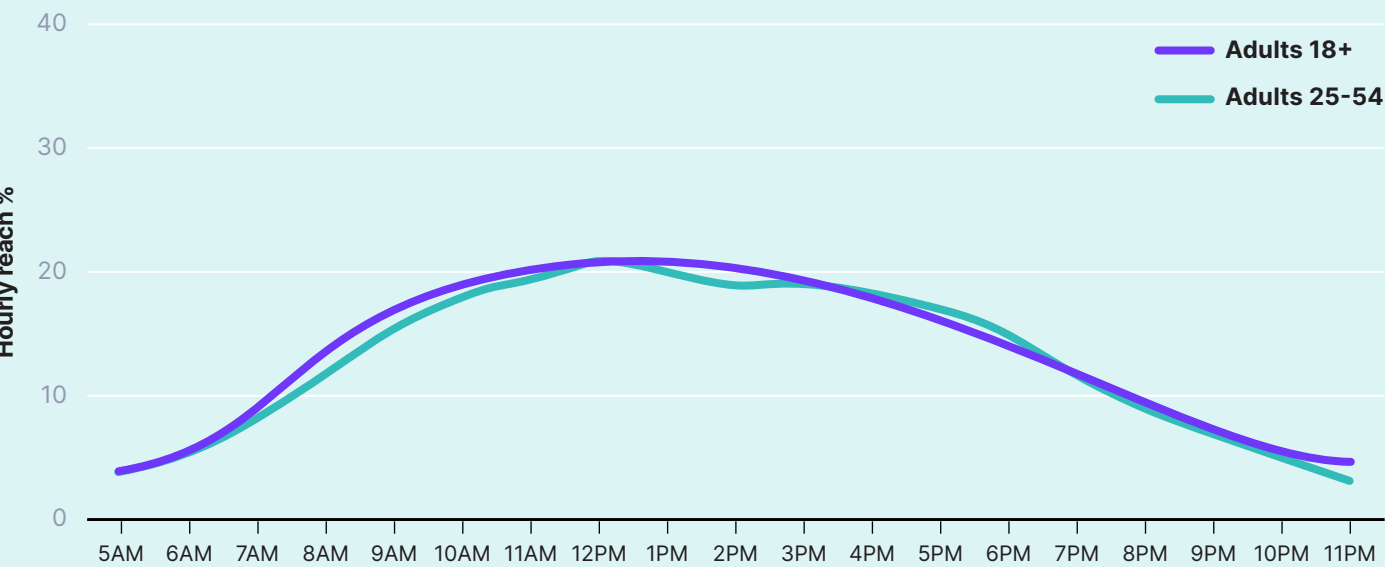


Monday-Friday

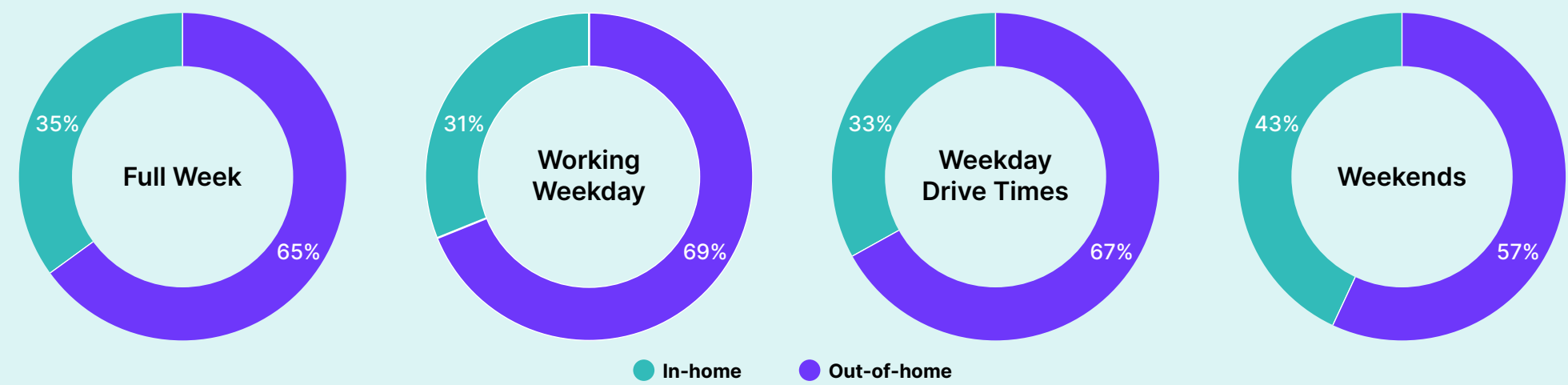


Source: Nielsen National Regional Database - Q4 2021

Saturday-Sunday



Consumers use radio when they're away from home

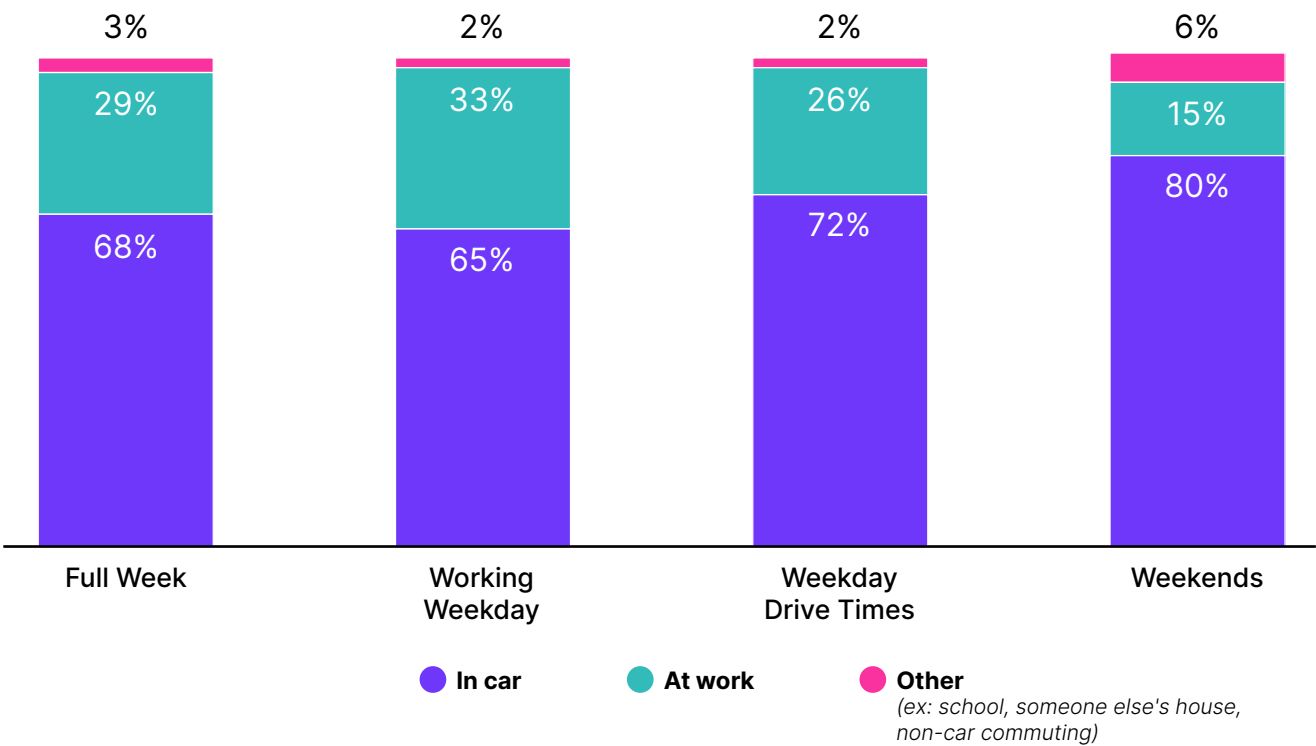


Source: Nielsen National Regional Database, Adults 18+ - Q4 2021



Most away-from-home listening happens in the car

Percent of all out-of-home listening, by location



Source: Nielsen National Regional Database, Adults 18+, Audio Diary markets only - Q4 2021

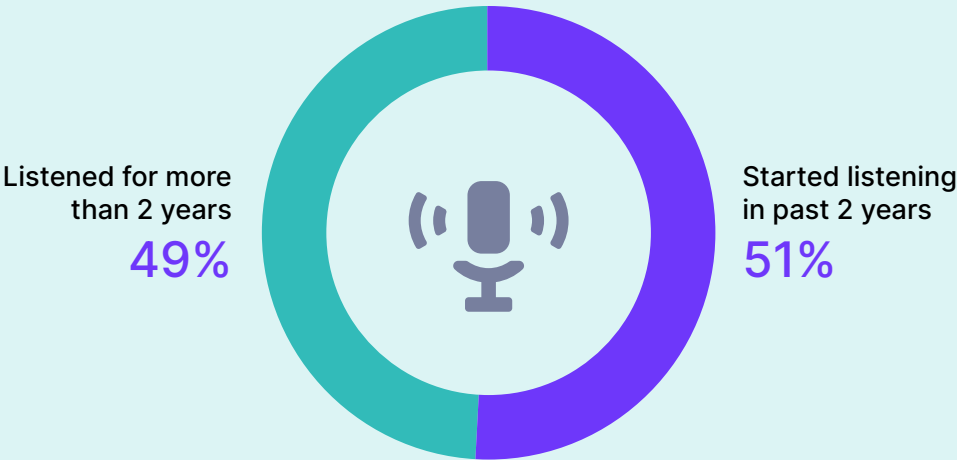
*Nielsen Custom Consumer Sentiment Survey, March 2022

70% of heavy radio consumers are now spending an hour or more daily* in vehicles, up 60% since spring 2020.

Podcasting today – growth in listening and spending

During a pandemic that drove millions indoors, and in front of screens, a funny thing happened with podcasts: audience engagement increased. Americans now have over 2 million podcast titles to choose from and U.S. podcast revenue is expected to hit \$2 billion next year.

Half of daily podcast listeners started listening to podcasts in the past two years

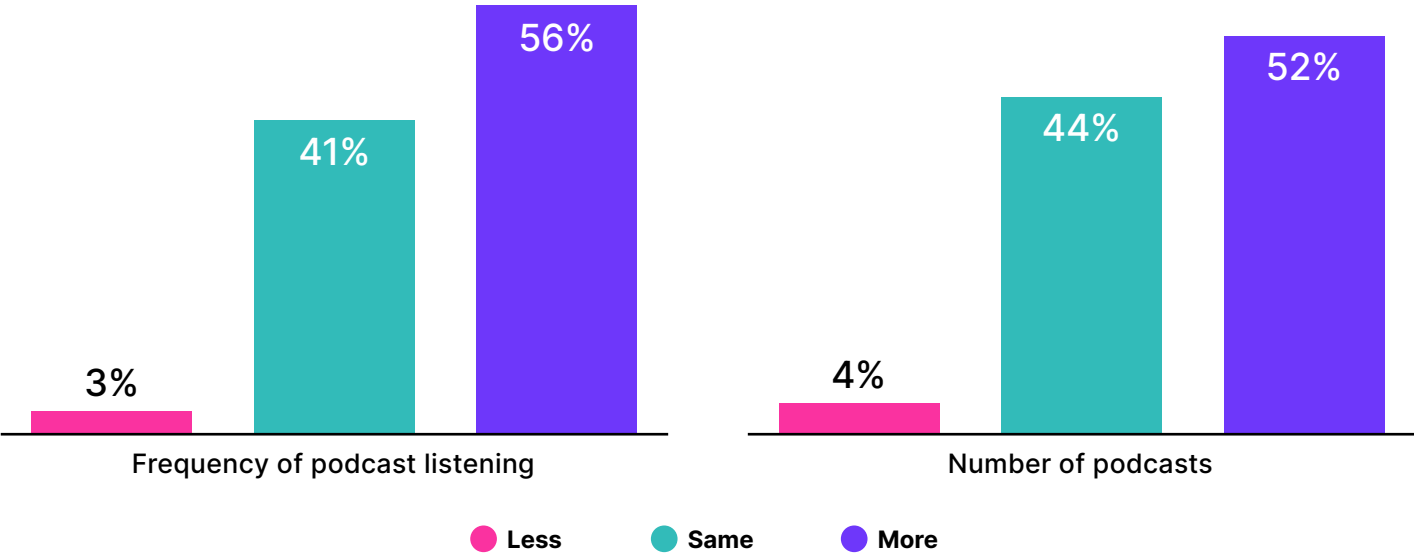


Source: Nielsen Custom Consumer Sentiment Study, March 2022



Podcast listeners now spend **90 minutes per day** in their vehicles

Daily podcast listeners are listening more often and to more titles



Percentages represent answers to this question: How has the frequency/number of podcasts you listen to changed in the past two years?
Source: Nielsen Custom Consumer Sentiment Study, March 2022





Comedy and news are top genres but many others have seen tremendous growth

Podcast genres	Nov 2019 listeners	May 2022 listeners (ranked)	Change
Comedy	19,622,900	28,352,766	+44%
News	19,559,133	26,833,659	+37%
True crime	12,893,267	21,459,366	+66%
Society & Culture	12,893,267	20,783,814	+23%
Music	8,912,232	18,599,331	+109%
Education	13,173,298	18,467,876	+40%
Health & Fitness	11,371,650	16,348,006	+44%
History	11,799,481	16,008,297	+36%
Business	11,311,592	15,764,171	+39%

Source: Nielsen Scarborough Podcast Buying Power, R1 2019 (Nov) to R2 2021 (May), Adults 18+, podcast genres you currently listen to

Podcast genres (cont.)	Nov 2019 listeners	May 2022 listeners (ranked)	Change
Sports	10,229,896	15,674,020	+53%
Arts	10,267,392	14,457,069	+41%
Science	12,570,336	14,340,767	+14%
TV & Film	9,001,389	14,247,218	+58%
Leisure	7,024,066	13,772,565	+96%
Religion & spirituality	7,979,963	11,522,794	+44%
Fiction	7,589,276	11,271,885	+49%
Technology	9,130,174	10,860,362	+19%
Kids & family	4,288,444	6,472,359	+51%

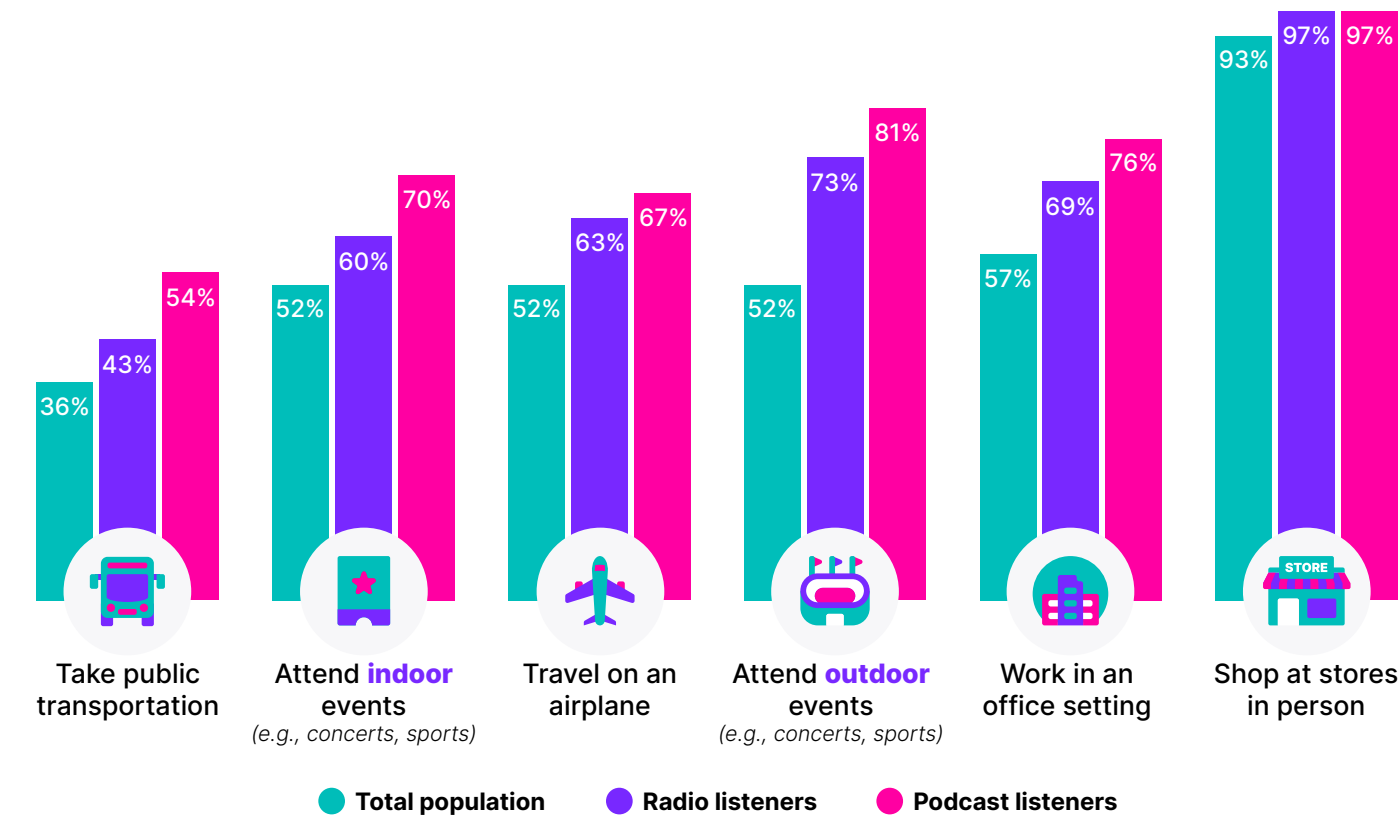


Audio consumers are leading the way toward recovery

With consumption at all-time highs the audio landscape has never had more potential for advertisers as we emerge from two years of pandemic routines. Nielsen's ongoing series of studies looking at consumer sentiment during the COVID crisis reveals that radio listeners and podcast consumers are more likely to shop, attend events, travel and make major purchases in the year ahead.

Audio listeners are more willing to shop in stores, attend events, work in office, and get on planes

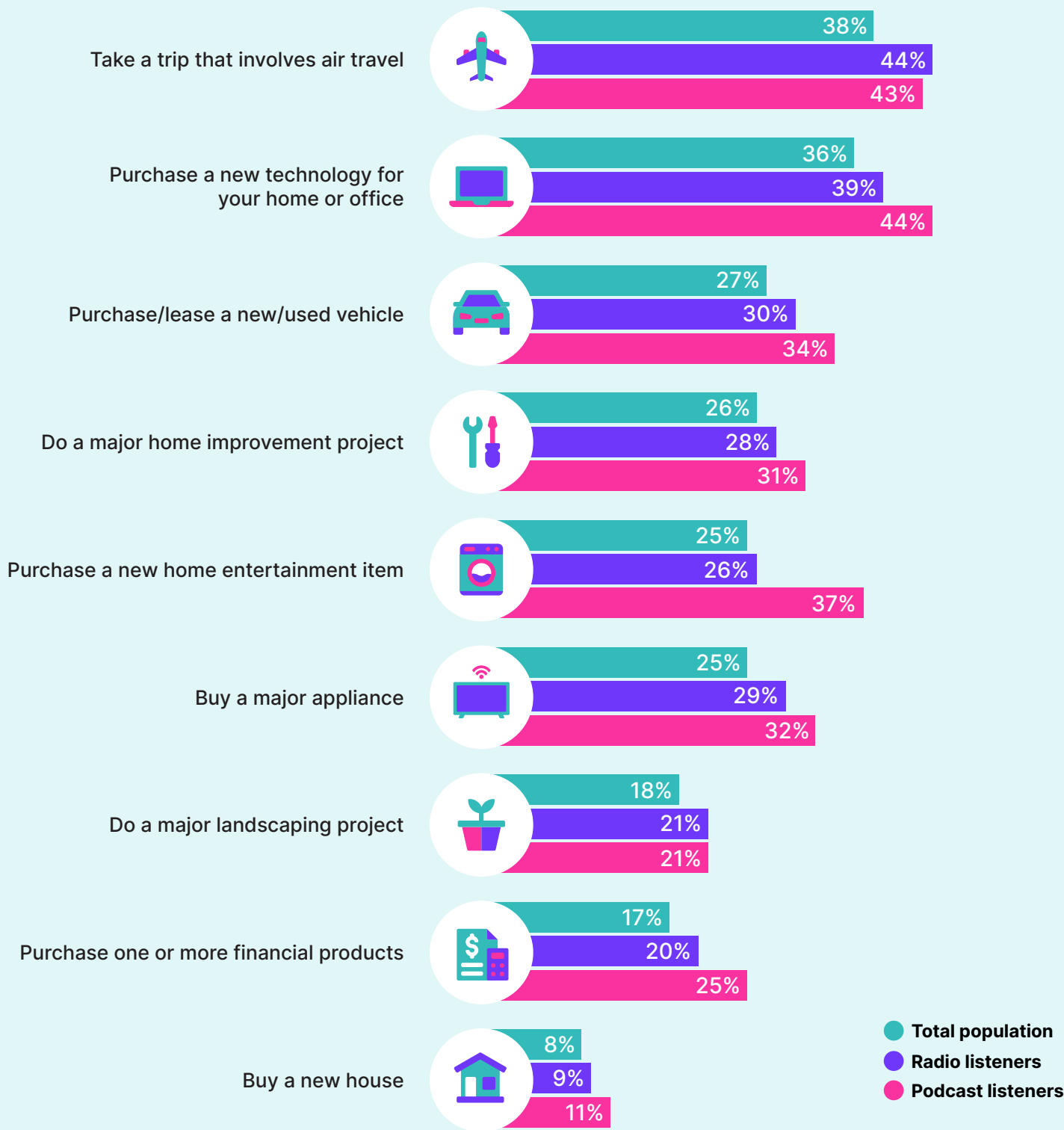
Please indicate the degree to which you would be willing to do the following types of activities: % very or somewhat willing



Source: Nielsen Custom Consumer Sentiment Survey, March 2022

Audio users more likely to plan major purchases in the next year

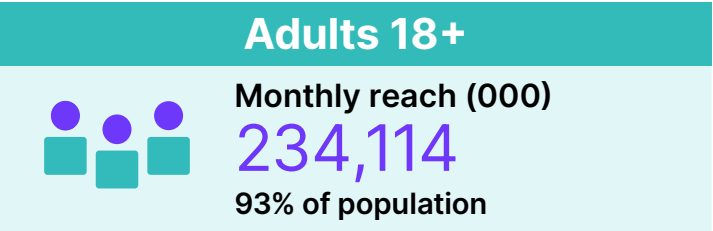
Which of the following, if any, do you intend to do in the next 12 months



Appendix

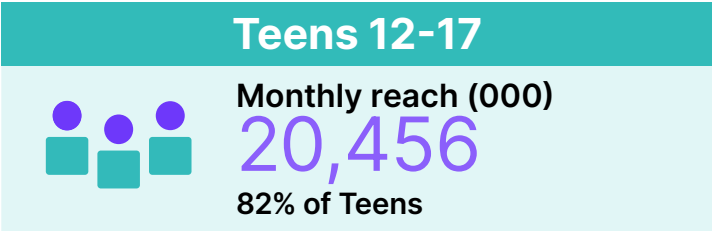
The following pages detail the monthly reach of radio and top formats among key audience groups, as well as a psychographic profile of the top 20 largest-reaching formats.

Monthly radio reach and top formats



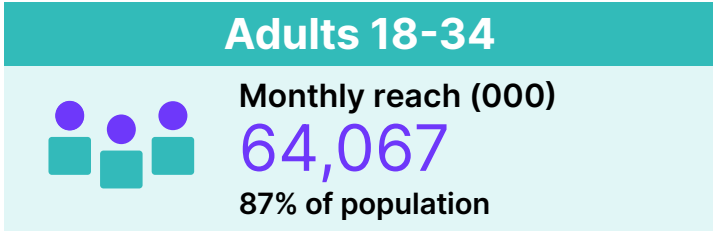
Top 3 formats (audience share)

1	Country	13.0%
2	News/Talk	12.7%
3	AC	8.6%



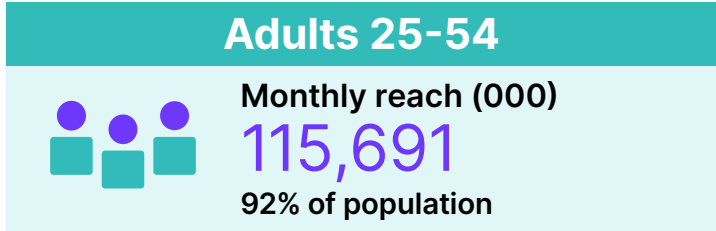
Top 3 formats (audience share)

1	Pop CHR	14.7%
2	Country	12.1%
3	AC	9.8%



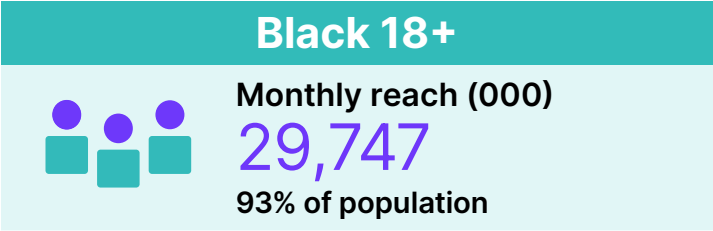
Top 3 formats (audience share)

1	Country	15.0%
2	Pop CHR	11.6%
3	AC	7.8%



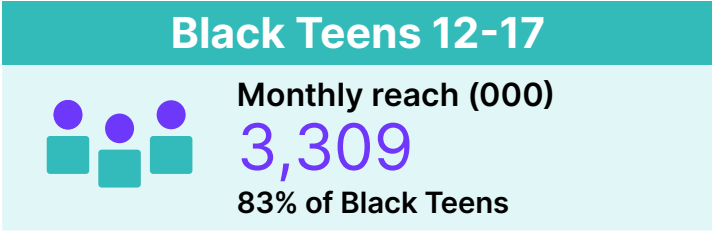
Top 3 formats (audience share)

1	Country	13.1%
2	AC	8.3%
3	Pop CHR	8.1%



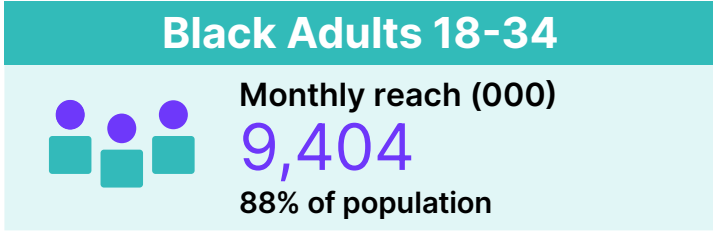
Top 3 formats (audience share)

1	Urban AC R&B	31.5%
2	Urban Contemporary Hip-Hop/R&B	18.4%
3	AC	5.8%



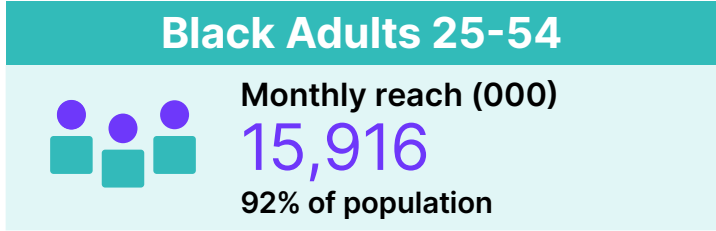
Top 3 formats (audience share)

1	Urban Contemporary Hip-Hop/R&B	28.3%
2	Urban AC R&B	22.2%
3	Rhythmic CHR	9.6%



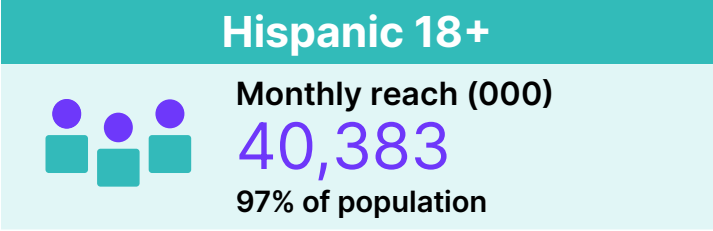
Top 3 formats (audience share)

1	Urban Contemporary Hip-Hop/R&B	30.0%
2	Urban AC R&B	21.9%
3	Rhythmic CHR	9.3%



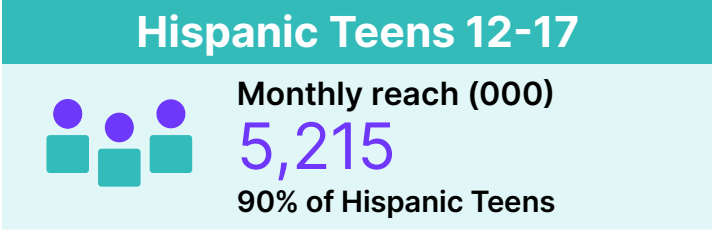
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1	Urban AC R&B	28.3%
2	Urban Contemporary Hip-Hop/R&B	24.3%
3	Rhythmic CHR	7.4%



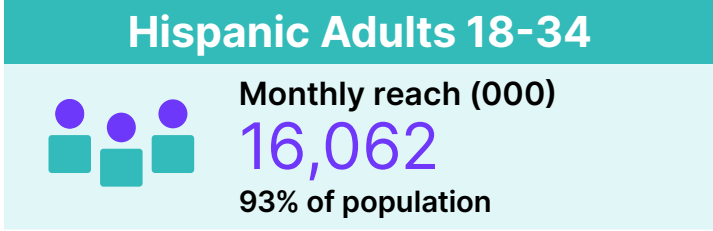
Top 3 formats (audience share)

1	Mexican Regional	15.3%
2	Spanish Contemporary + Spanish HotAC	10.3%
3	AC	8.2%



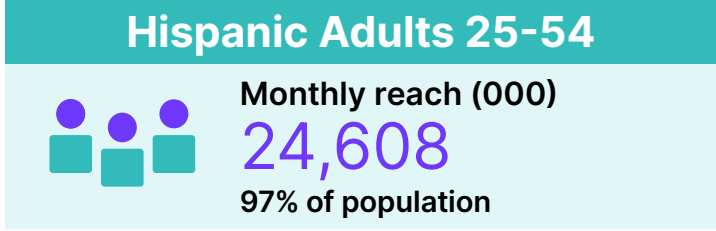
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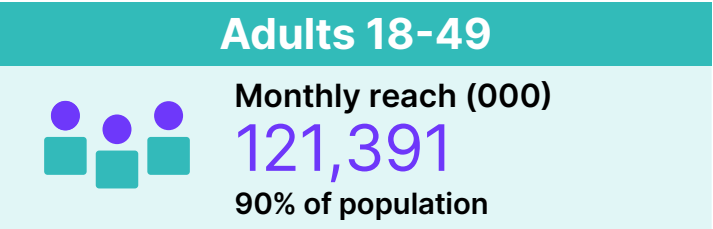


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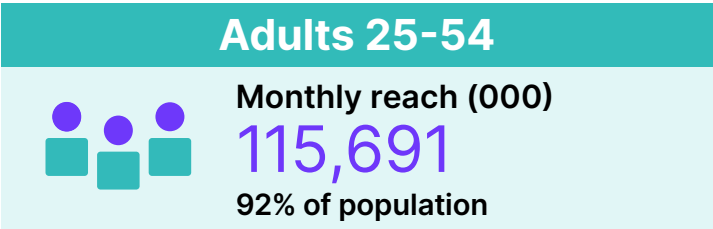
Nielsen RADAR 152 Mar 2022 (Contiguous U.S.) + Nielsen National Regional Database Q4 2021 (AK & HI). M-Su 12M-12M
AC stands for Adult Contemporary | CHR stands for Contemporary Hit Radio; AC = Adult Contemporary + Soft Adult Contemporary; Country = Country + New Country; News/Talk = News/Talk/Information + Talk/Personality and includes both commercial and non-commercial stations

Monthly radio reach and top formats



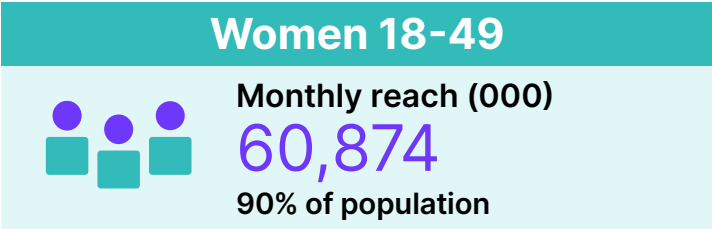
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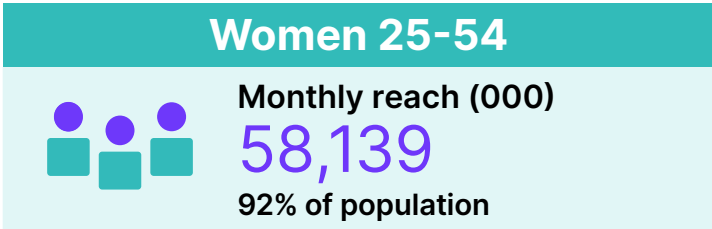
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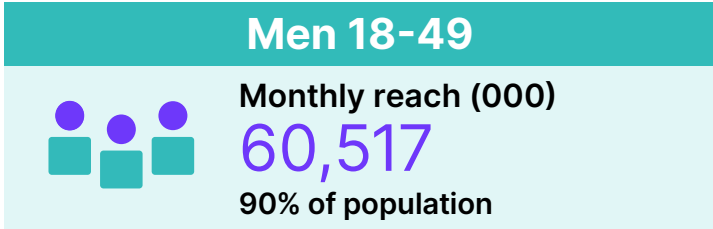
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3	AC	10.0%



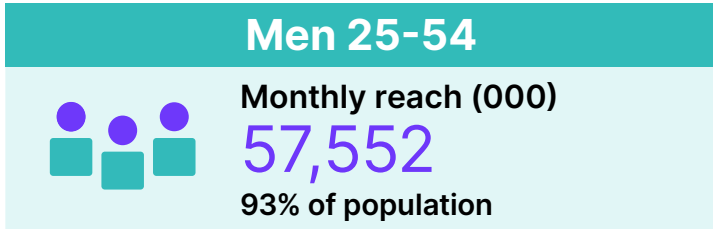
Top 3 formats (audience share)

1	Country	14.2%
2	AC	10.6%
3	Pop CHR	10.1%



Top 3 formats (audience share)

1	Country	12.9%
2	News/Talk	8.1%
3	Classic Rock	7.9%








Top 3 formats (audience share)

1	Country	12.1%
2	News/Talk	9.8%
3	Classic Rock	8.7%

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Top 20 AM/FM Radio formats (ranked by reach)

						
		Monthly reach (000)	Median age	% Employed (full or part time)	Average household size	% of households with children under 18
1	AC	56,734	48	65%	3.1	35%
2	Country	51,668	49	64%	3.1	36%
3	News/Talk	46,604	57	61%	2.8	27%
4	Pop CHR	44,957	36	72%	3.4	46%
5	Classic Hits	40,733	54	62%	2.9	29%
6	Classic Rock	36,291	52	68%	2.9	30%
7	Hot AC	33,763	41	72%	3.3	44%
8	Alternative	19,734	38	77%	3.2	40%
9	Contemporary Christian	19,515	48	66%	3.2	38%
10	Urban AC R&B	18,149	51	58%	3.0	35%
11	Urban Contemporary Hip-Hop/R&B	18,074	38	69%	3.2	44%
12	All News	17,467	59	60%	2.9	25%
13	AOR + Mainstream Rock	16,294	47	70%	3.0	34%
14	Rhythmic CHR	15,604	35	70%	3.5	49%
15	Adults Hits/80s Hits	11,041	47	71%	3.2	37%
16	Spanish Contemporary + Spanish Hot AC	10,756	42	72%	3.8	49%
17	Active Rock	10,408	41	76%	3.2	44%
18	Mexican Regional	9,644	43	74%	4.0	55%
19	All Sports	8,827	51	69%	2.9	32%
20	Classical	7,879	60	52%	2.5	20%

Source: Nielsen National Regional Database Q4 2021, Adults 18+. M-SU 12M-12M; Age, Employment, HHLD size and % w Children via Nielsen Scarborough USA+ Rel 2 2021, current 6 months, Adults 18+
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About Nielsen

Nielsen shapes the world's media and content as a global leader in audience measurement, data and analytics. Through our understanding of people and their behaviors across all channels and platforms, we empower our clients with independent and actionable intelligence so they can connect and engage with their audiences—now and into the future.

An S&P 500 company, Nielsen (NYSE: NLSN) operates around the world in more than 55 countries. Learn more at www.nielsen.com or www.nielsen.com/investors and connect with us on social media.

Audience Is Everything™

