



Audio today 2022



How America listens

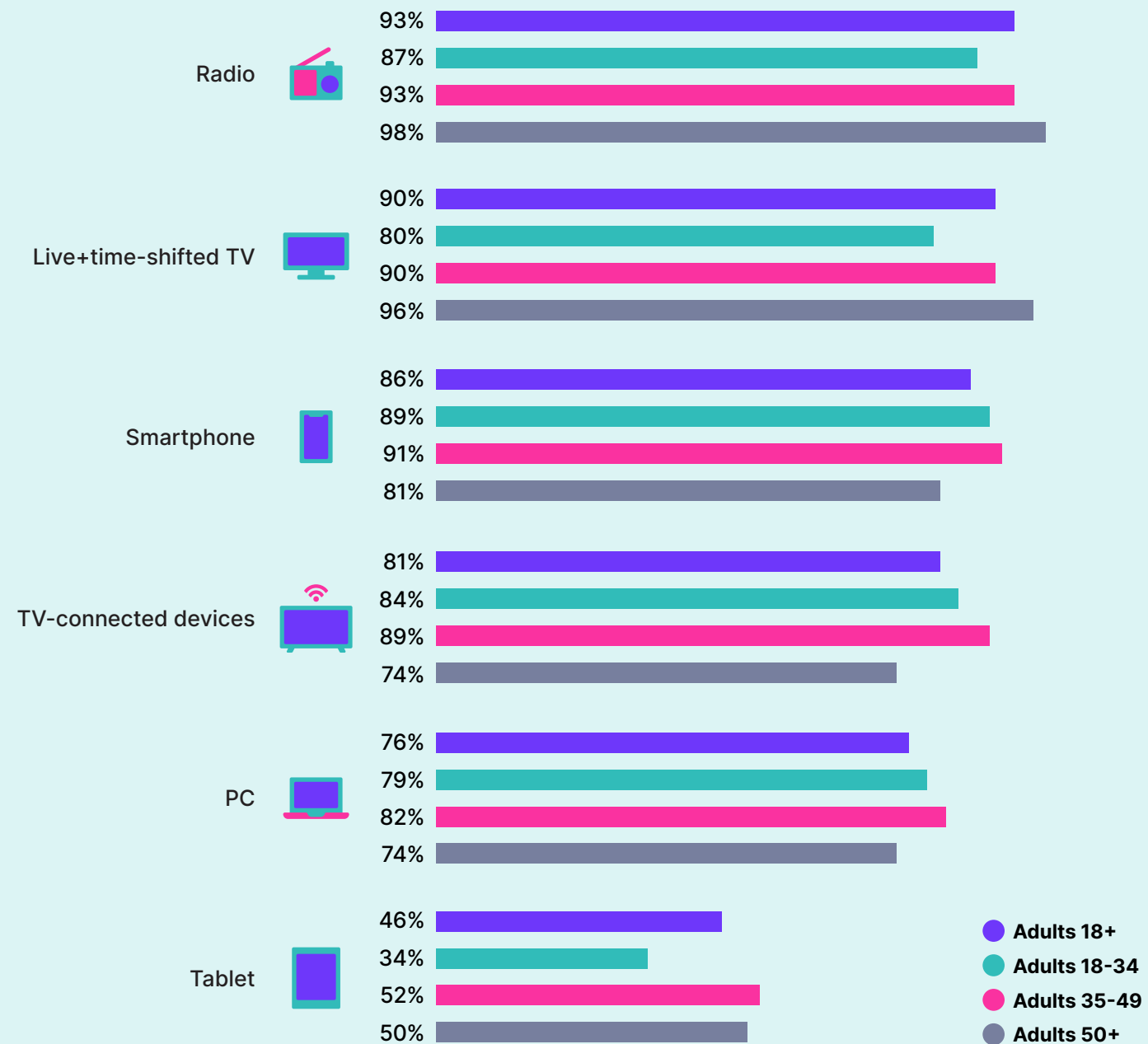
June 2022



Comparing monthly reach

U.S. monthly reach

Percent of population



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%

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

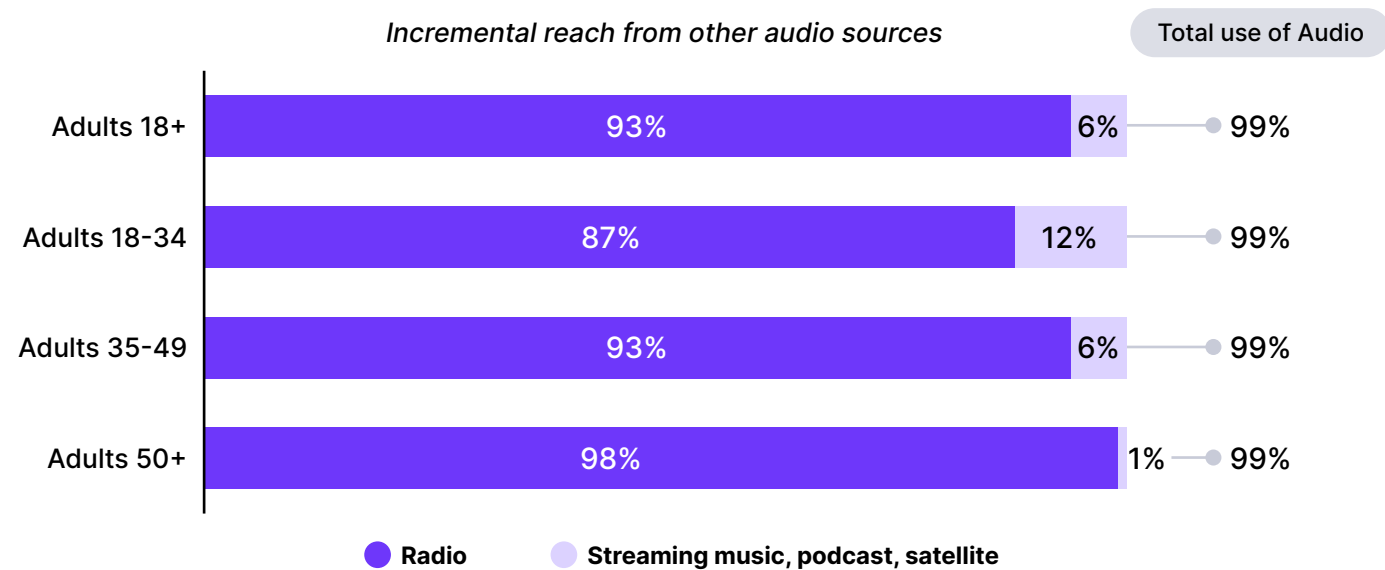
Radio is the center of the total audio universe



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



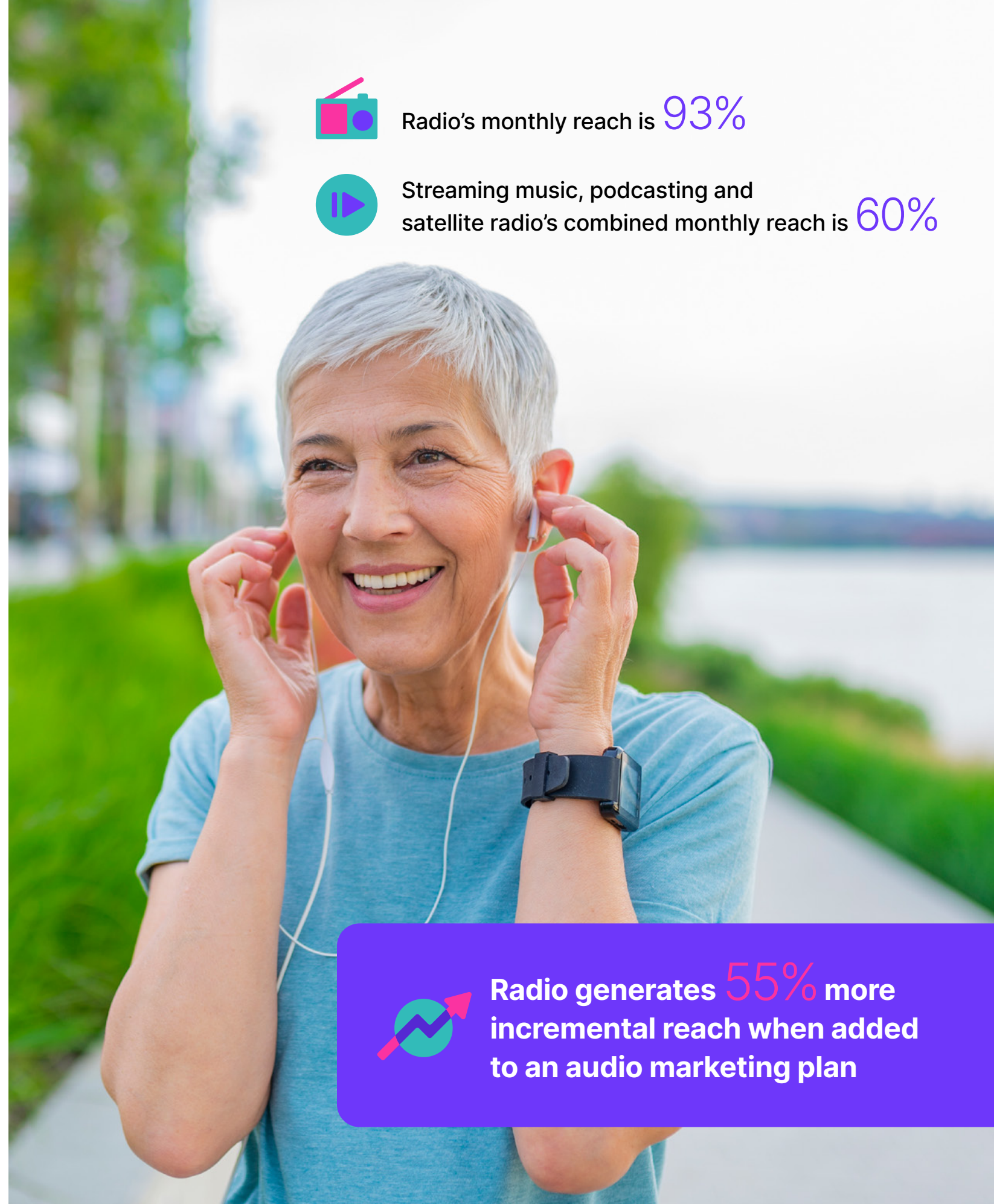
Source: Nielsen RADAR, Nielsen Scarborough - Q4 2021



Radio's monthly reach is **93%**



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

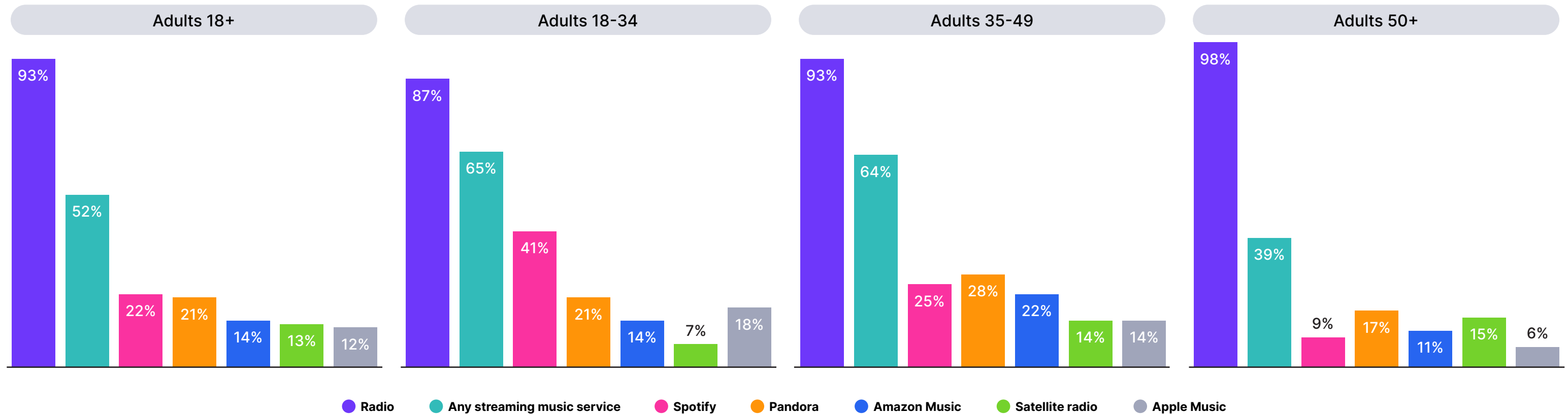


Radio generates **55%** more incremental reach when added to an audio marketing plan

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



Monthly reach % among U.S. population



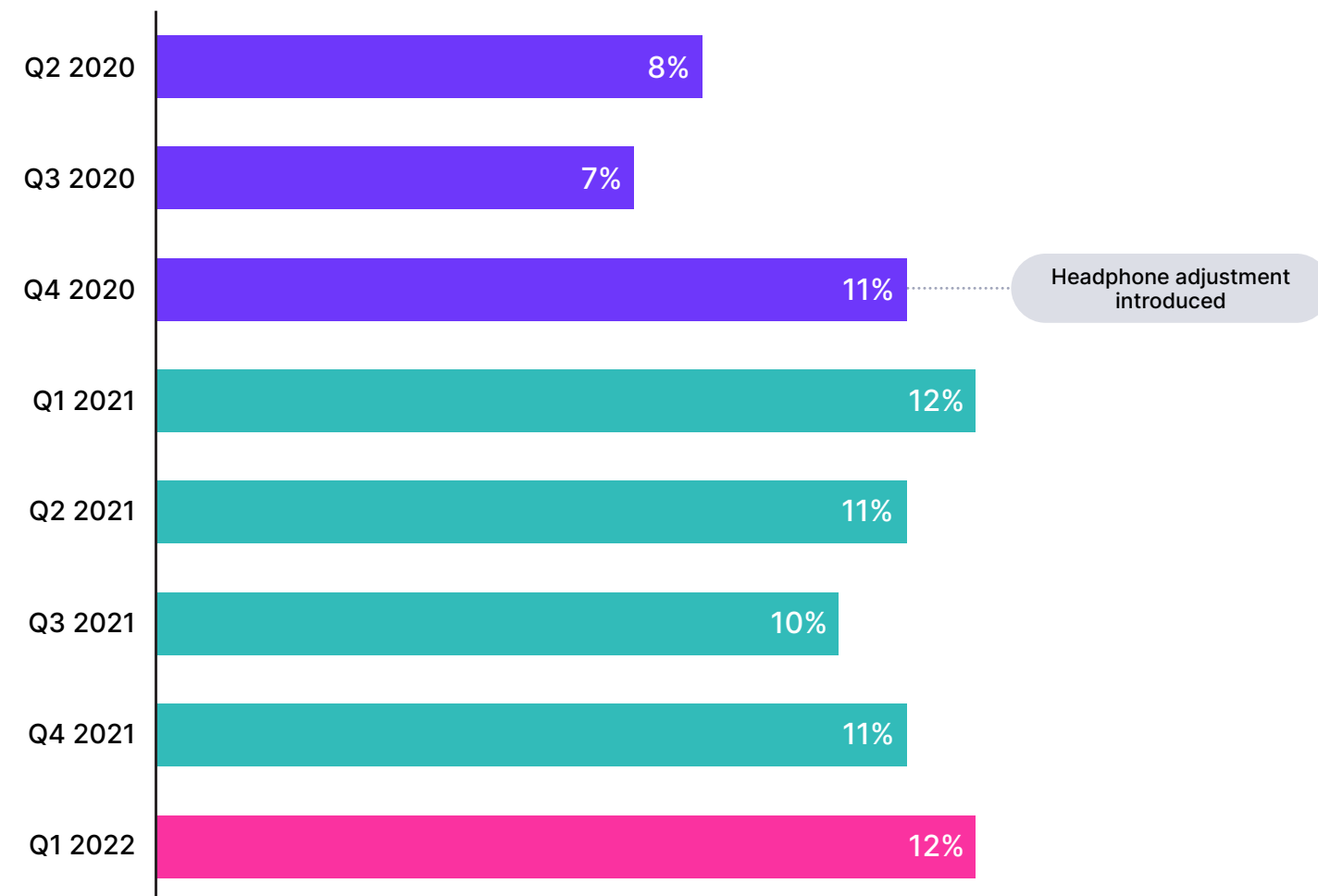
Source: Nielsen RADAR, Nielsen Scarborough - Q4 2021

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



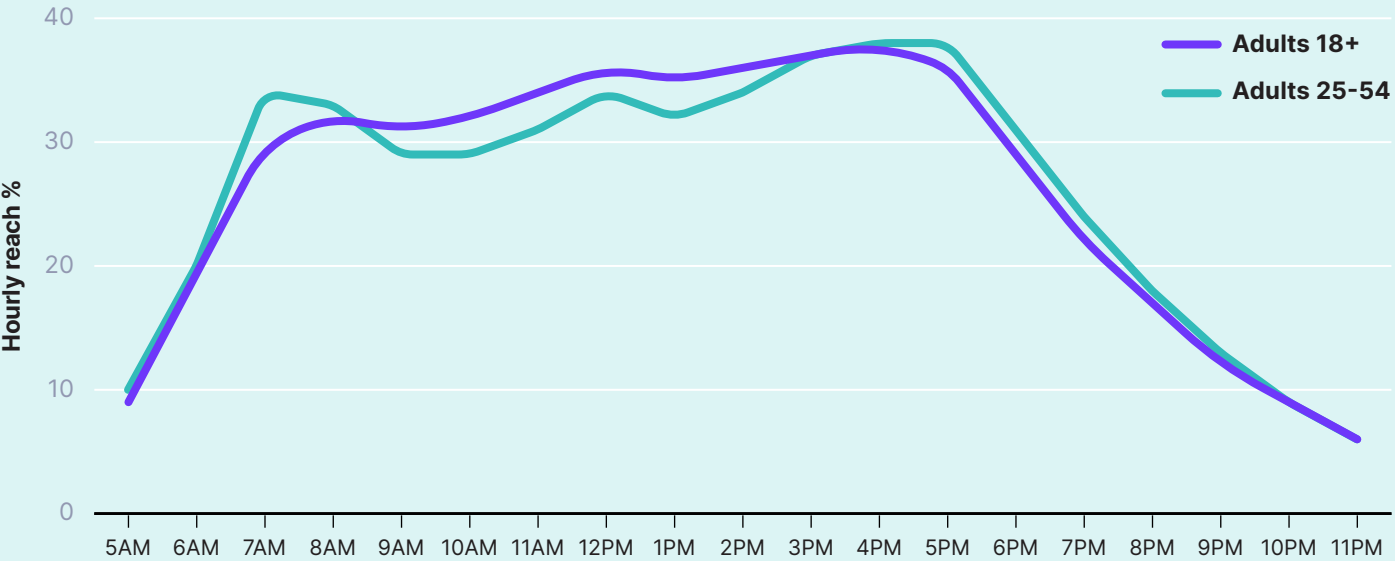


Radio use spans the bulk of the day, reaching consumers on the path to purchase while they're away from home and in the car

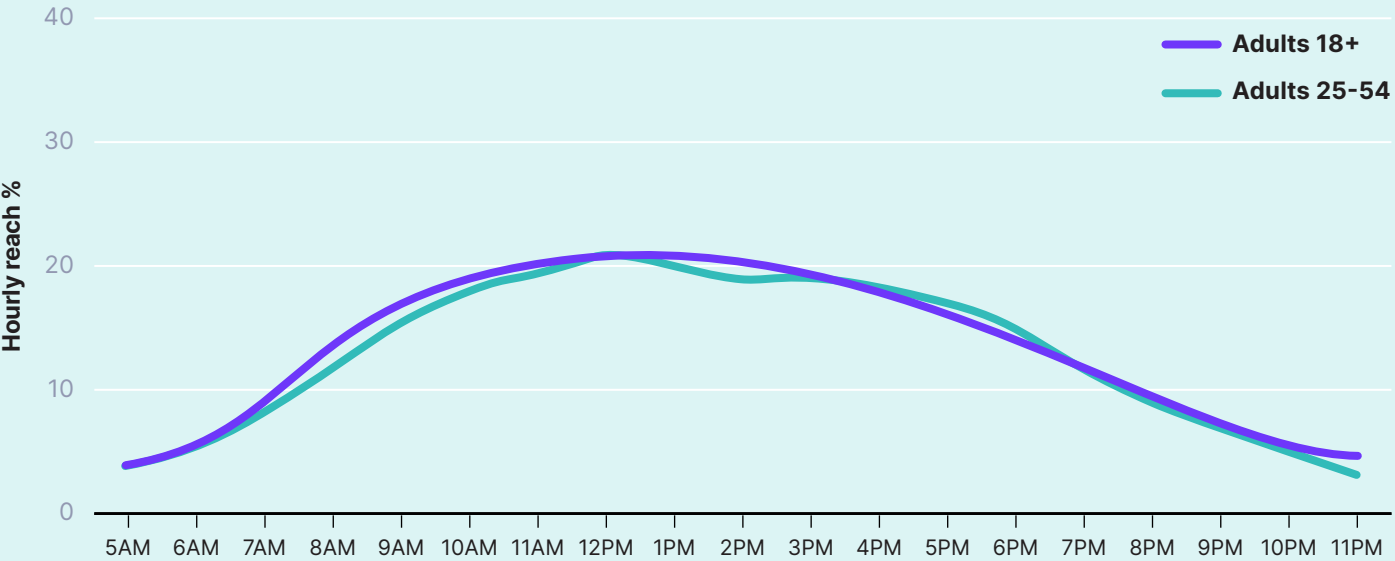
A daily companion for millions, radio is a particularly effective medium for advertisers due to its legacy of reaching listeners during the prime hours of the day while they are out of home and closest to the point of purchase (commuting, working, shopping). And with time in vehicles on the rise after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



Monday-Friday

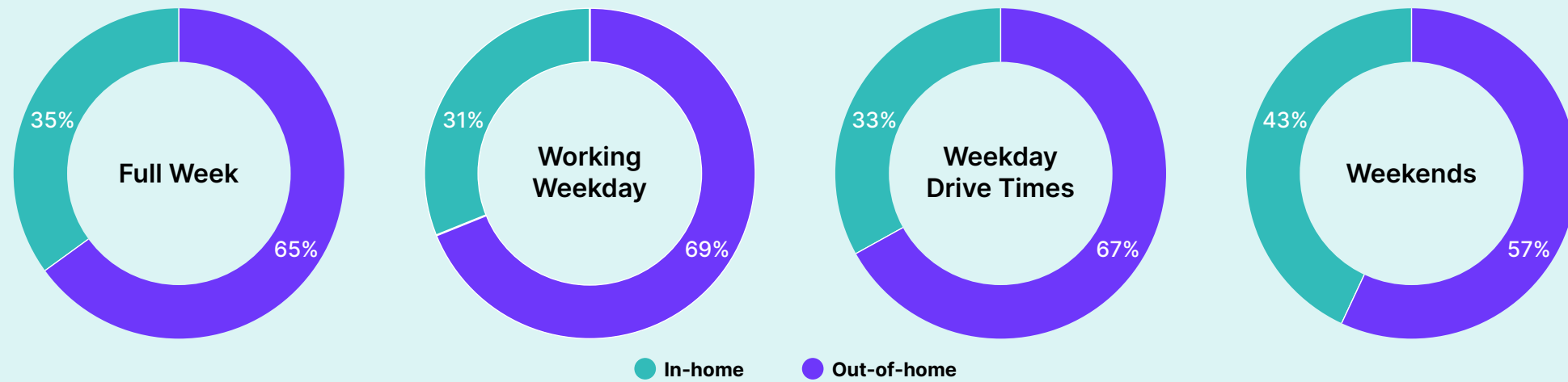


Saturday-Sunday



Source: Nielsen National Regional Database - Q4 2021

Consumers use radio when they're away from home

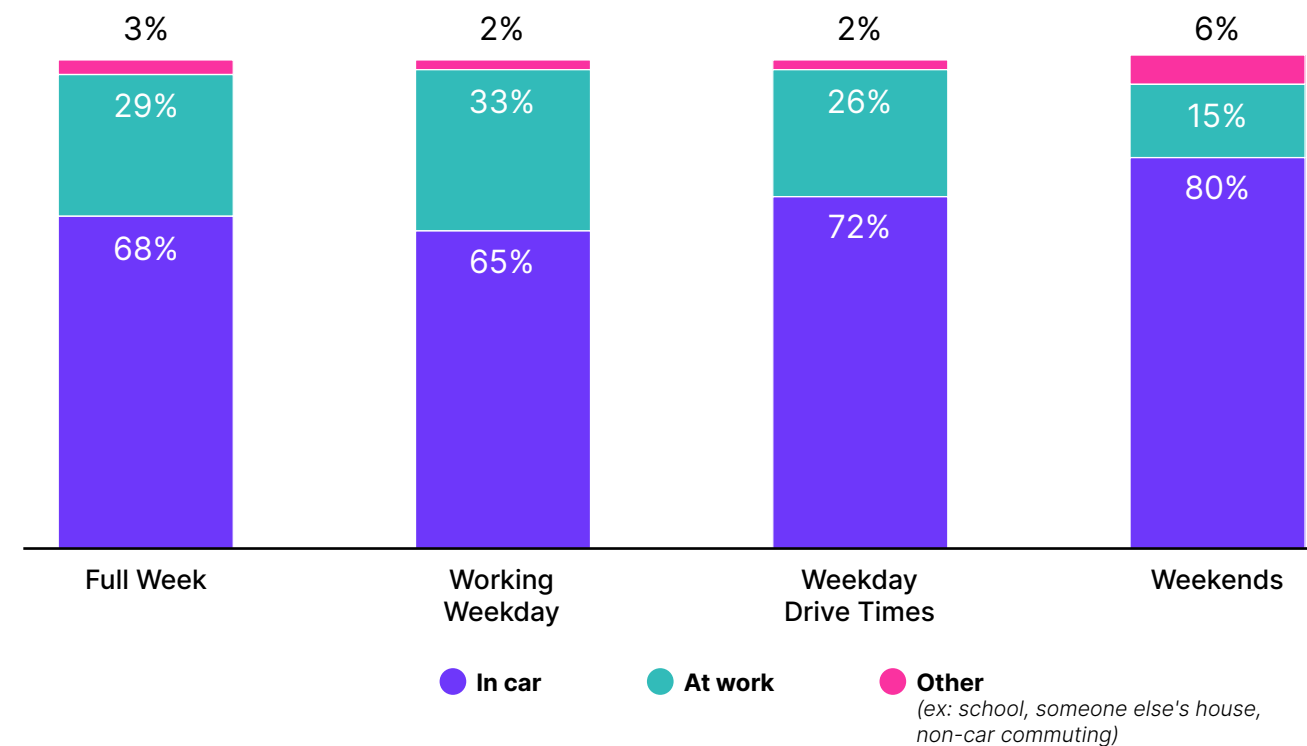


Source: Nielsen National Regional Database, Adults 18+ - Q4 2021



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

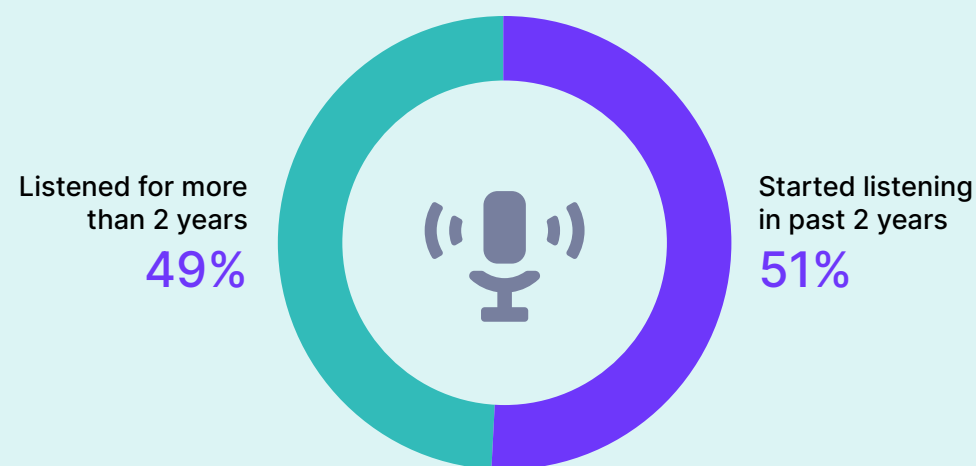
*Nielsen Custom Consumer Sentiment Survey, March 2022

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

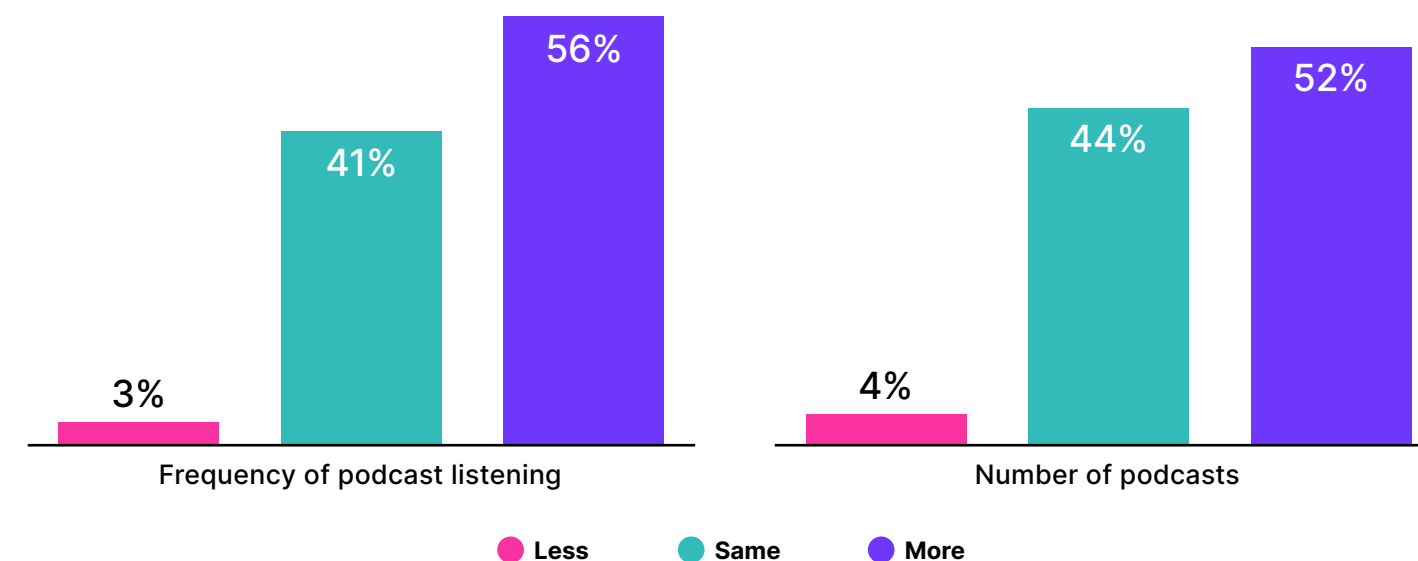


Source: Nielsen Custom Consumer Sentiment Study, March 2022



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 (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%

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

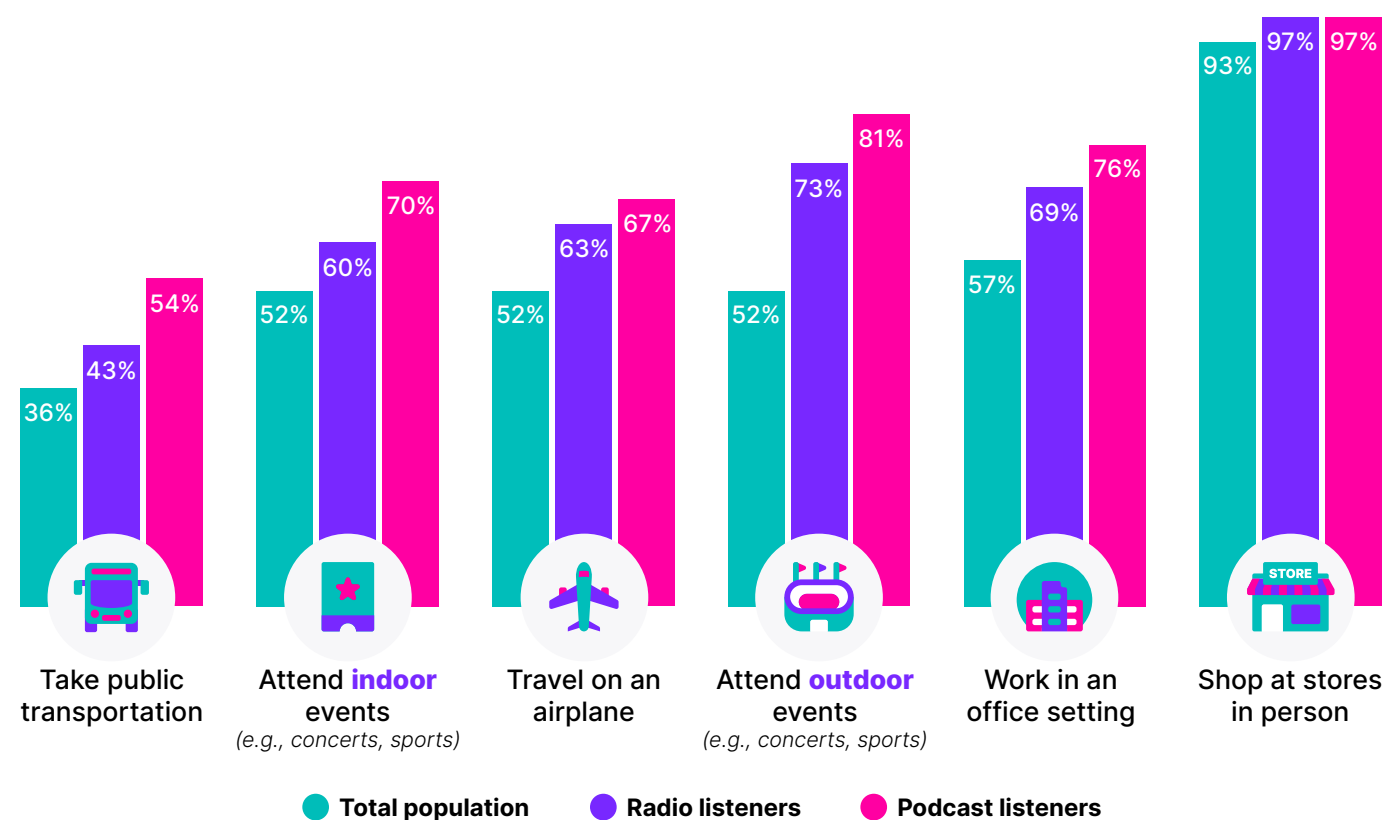


Audio consumers are leading the way toward recovery

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

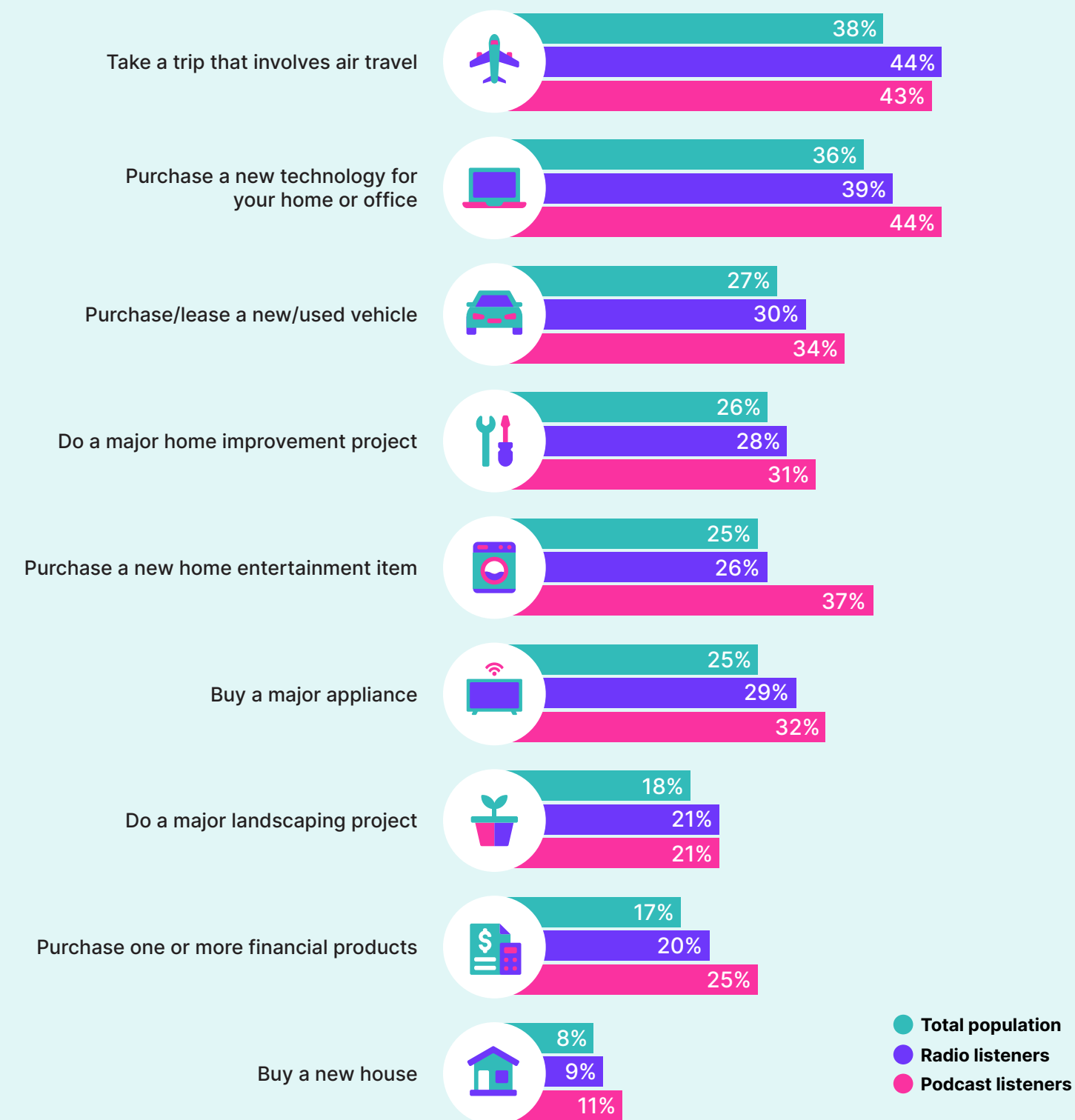
Please indicate the degree to which you would be willing to do the following types of activities: % very or somewhat willing



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

Adults 18+

Monthly reach (000)
234,114
93% of population

Top 3 formats (audience share)

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

Teens 12-17

Monthly reach (000)
20,456
82% of Teens

Top 3 formats (audience share)

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

Adults 18-34

Monthly reach (000)
64,067
87% of population

Top 3 formats (audience share)

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

Adults 25-54

Monthly reach (000)
115,691
92% of population

Top 3 formats (audience share)

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

Black 18+

Monthly reach (000)
29,747
93% of population

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%

Black Teens 12-17

Monthly reach (000)
3,309
83% of Black Teens

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%

Black Adults 18-34

Monthly reach (000)
9,404
88% of population

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%

Black Adults 25-54

Monthly reach (000)
15,916
92% of population

Top 3 formats (audience share)

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

Hispanic 18+

Monthly reach (000)
40,383
97% of population

Top 3 formats (audience share)

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

Hispanic Teens 12-17

Monthly reach (000)
5,215
90% of Hispanic Teens

Top 3 formats (audience share)

1	Pop CHR	12.9%
2	Mexican Regional	12.0%
3	AC	9.3%

Hispanic Adults 18-34

Monthly reach (000)
16,062
93% of population

Top 3 formats (audience share)

1	Mexican Regional	13.4%
2	Pop CHR	10.2%
3	Spanish Contemporary + Spanish HotAC	8.9%

Hispanic Adults 25-54

Monthly reach (000)
24,608
97% of population

Top 3 formats (audience share)

1	Mexican Regional	17.1%
2	Spanish Contemporary + Spanish HotAC	10.5%
3	AC	8.1%

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

Adults 18-49

Monthly reach (000)
121,391
90% of population

Top 3 formats (audience share)

1	Country	13.7%
2	Pop CHR	9.6%
3	AC	8.2%

Women 18-49

Monthly reach (000)
60,874
90% of population

Top 3 formats (audience share)

1	Country	14.5%
2	Pop CHR	11.8%
3	AC	10.0%

Men 18-49

Monthly reach (000)
60,517
90% of population

Top 3 formats (audience share)

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

Adults 25-54

Monthly reach (000)
115,691
92% of population

Top 3 formats (audience share)

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

Women 25-54

Monthly reach (000)
58,139
92% of population

Top 3 formats (audience share)

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

Men 25-54

Monthly reach (000)
57,552
93% of population

Top 3 formats (audience share)

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

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

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+

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

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™

