



OCTOBER 2019

AUDIO TODAY 2019

A FOCUS ON NETWORK RADIO

THE EXPANDING AUDIO MARKETPLACE

It seems every day there's a new source for audio programming—and a new way for consumers to listen. The proliferation of smart speakers and voice assistants, along with the explosion of podcasts and platforms, speaks to consumers' desire for quality audio content wherever they are and whenever they want it. Audio answers the call—American consumers continue to listen to news, music, sports, personalities and more at home and on the go. They use their smart speakers at home, crank up their in-car audio entertainment centers and take their favorite stations, programs and personalities with them on their mobile devices. One-third of US households own a smart speaker, while 37% of consumers (18+) use a voice assistant.

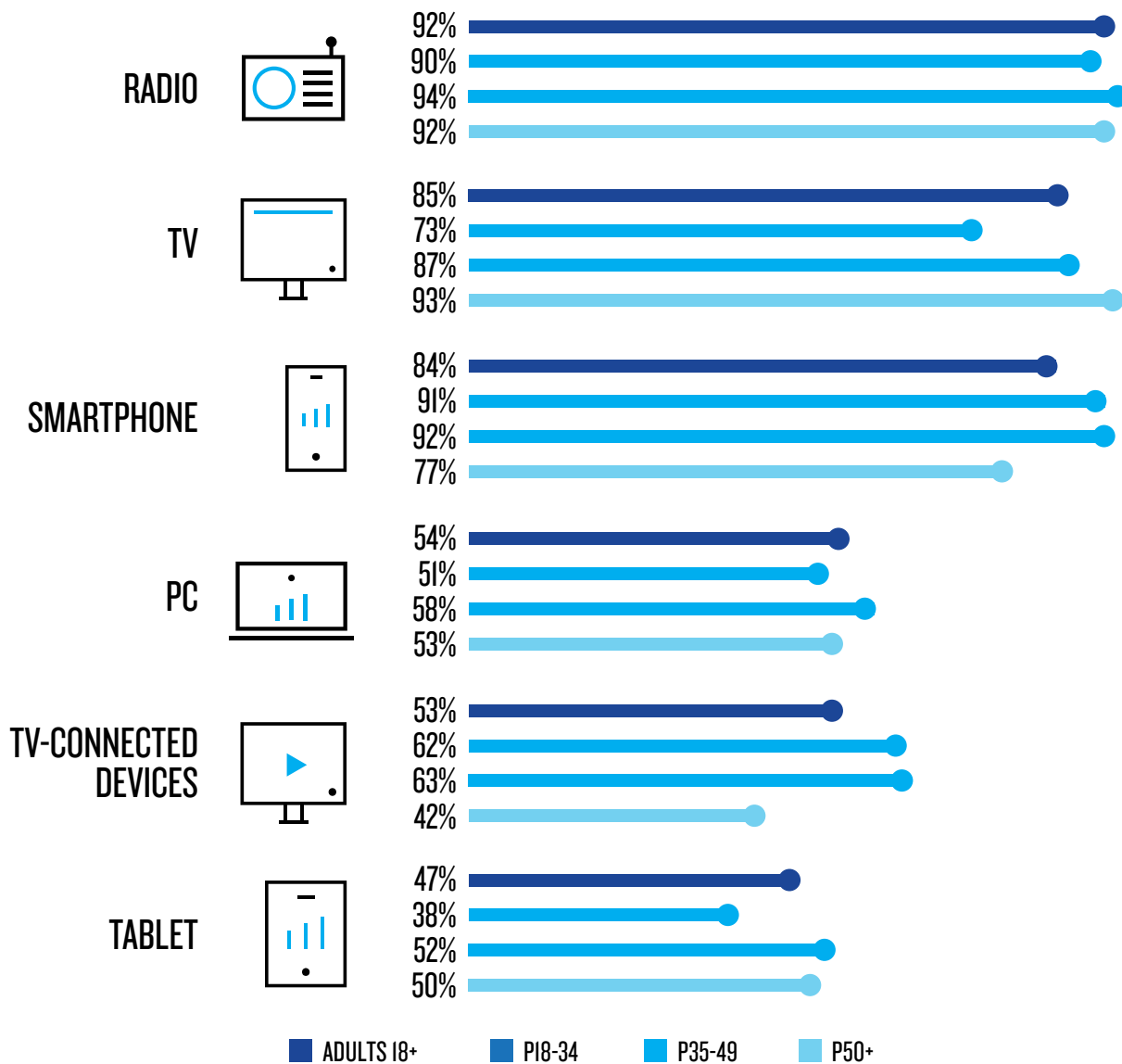
Radio, the load-bearing wall in audio's house, reaches more Americans each week than any other platform. Ninety-two percent of adult consumers (18+) listen to radio every week—and a huge portion of that listening is to stations affiliated with a radio network. Consumers of all ages choose network-radio-affiliated stations each week—including 94% of 18-49 and 25-54 year-old radio users.

In this edition of the *Audio Today* report, we examine network radio and the immense roster of curated content that reaches large numbers of consumers all across America. Powered by dozens of networks and syndicators which supply programming to thousands of stations, network radio offers access to engaged audio consumers who are out of home and close to the point of purchase with money to spend.



RADIO REACHES MORE AMERICANS EACH WEEK THAN ANY OTHER PLATFORM

WEEKLY REACH (% OF POPULATION)



Source: Nielsen Total Audience Report Q2 2019

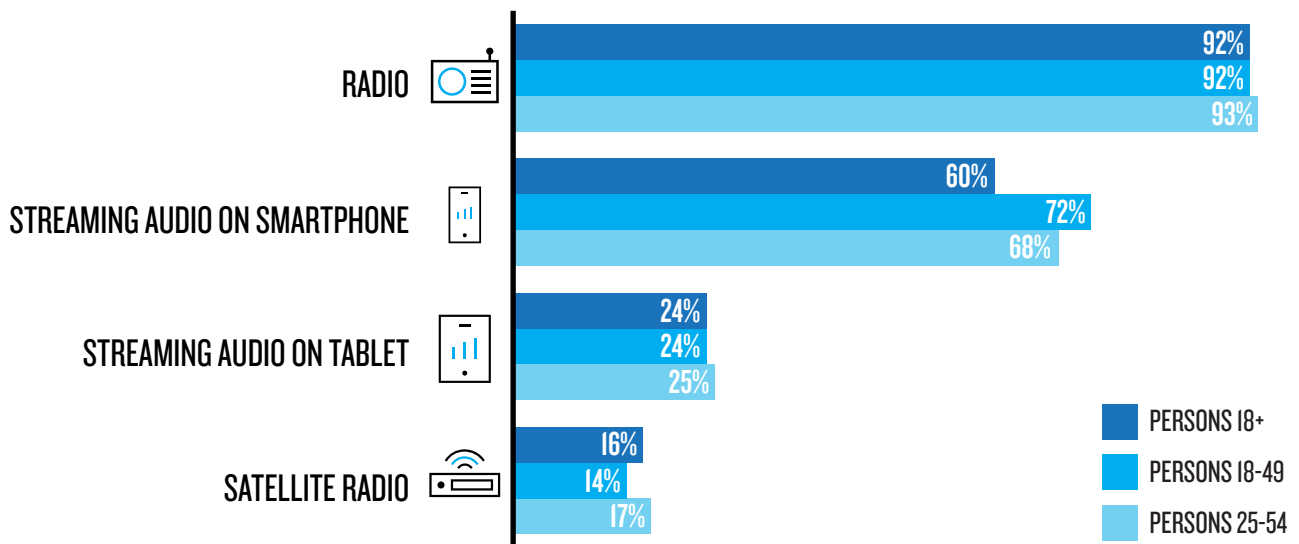
TV = Live + DVR/Timeshifted TV

TV-Connected Devices = DVD, Game Console, Multimedia Device, VCR

THE AUDIO UNIVERSE

Audio, in all its various forms, is increasingly winning the attention of American consumers. Even though radio has been around longer than most other forms of media, it remains the king of reach. At the same time, streaming options continue to proliferate, with smartphone audio netting the second largest weekly reach behind radio.

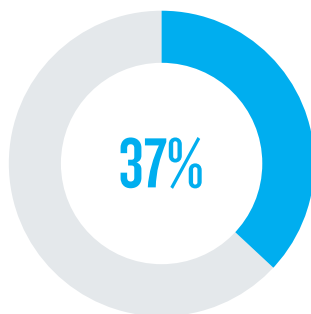
WEEKLY REACH OF AUDIO (PERCENT OF U.S. POPULATION)



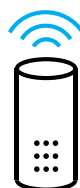
Increasingly, smart speakers and voice assistants (such as Amazon’s Alexa, Apple’s Siri, and Google Assistant) are making it easier for consumers to connect with audio. According to Nielsen’s MediaTech Trender, a quarterly consumer tracking survey focused on emerging technology, 29% of U.S. households own a smart speaker.



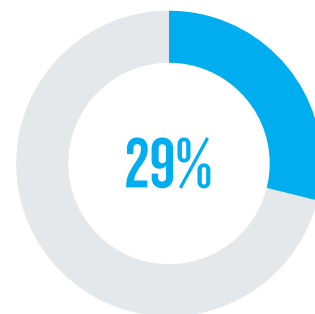
VOICE ASSISTANT USE



PERSONS 18+



SMART SPEAKER OWNERSHIP



HOUSEHOLDS 18+

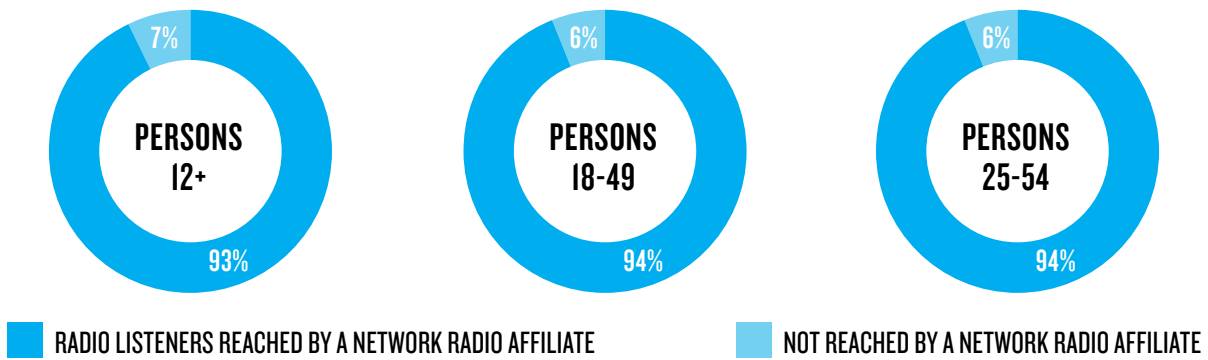
Source: (Top) Nielsen Total Audience Insights Q2 2019. Satellite Radio data comes from Nielsen Scarborough USA+ Release 1 2019. (Bottom) Nielsen MediaTech Trender Q2 2019.

NETWORK RADIO REACHES A WIDE VARIETY OF AMERICANS

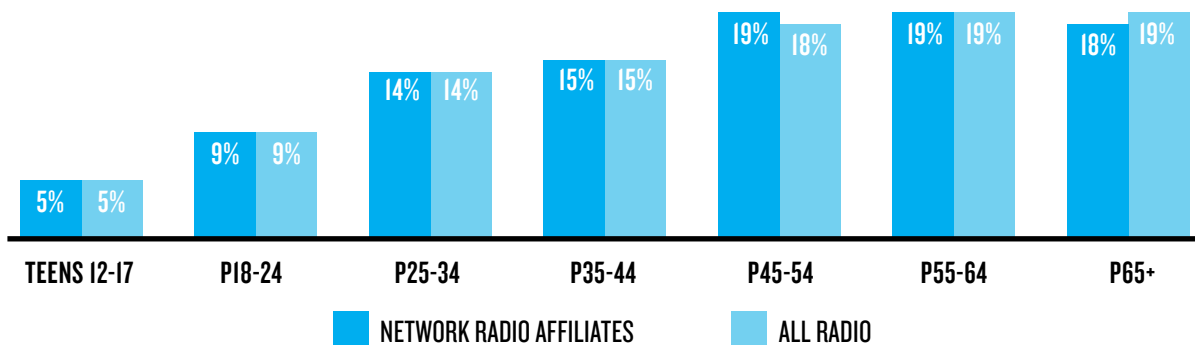
Network programming and services are radio's national currency: a large and diverse catalog of syndicated audio content which includes everything from 24-hour music channels to sports talk and political analysis, as well as some of the biggest personalities in radio.

The list of stations and affiliates that combine to represent the network radio audience is immense, and so is its audience.

MORE THAN 93% OF RADIO LISTENERS TUNE TO A NETWORK-AFFILIATED STATION EVERY WEEK



BECAUSE THE MAJORITY OF RADIO LISTENERS ARE ALSO REACHED BY NETWORK AFFILIATES, THE NETWORK AUDIENCE CLOSELY MIRRORS THE TOTAL RADIO AUDIENCE.

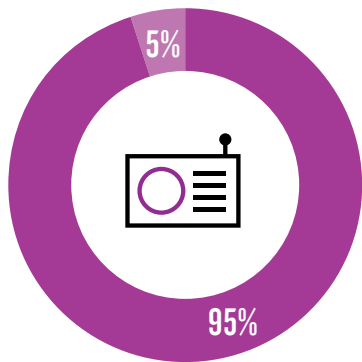


Source: Nielsen Audio National Regional Database (NRD), Spring 2019, Mon-Sun 5am-12mid, Weekly Cume, Composition Percents based on NRD total U.S. PUR, NRRC Affiliate Lists dated August/September 2019

NETWORK LISTENERS

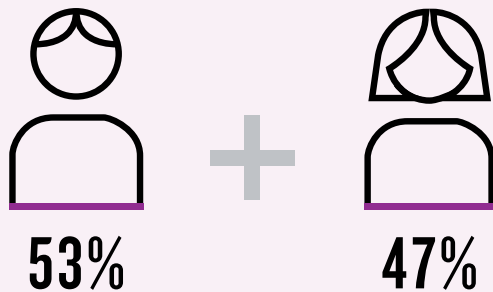


NETWORK RADIO LISTENERS 18-34



95% OF RADIO LISTENERS 18-34 TUNE TO NETWORK-AFFILIATED STATIONS EACH WEEK

COMPOSITION OF P18-34 NETWORK AFFILIATE LISTENERS



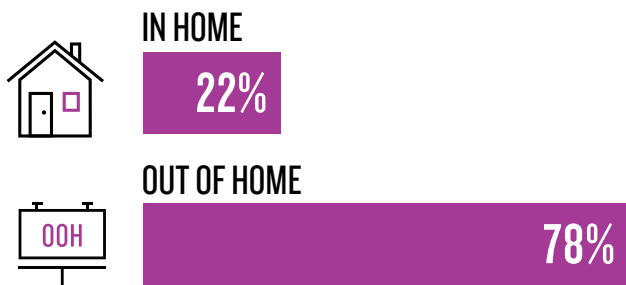
HOUSEHOLD INCOME

\$75K+	34%
\$50K - \$75K	22%
\$25K - \$50K	27%
<\$25K	16%

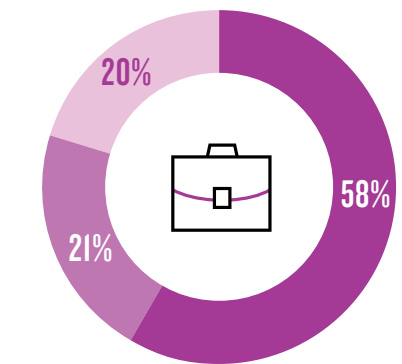
EDUCATION

COLLEGE GRAD	23%
SOME COLLEGE	35%
NO COLLEGE	41%

LISTENING LOCATION



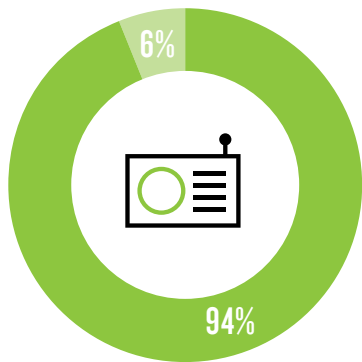
WORK



FULL-TIME **PART-TIME**
NOT EMPLOYED FULL- OR PART-TIME (INCL. RETIRED, STUDENT, ETC.)

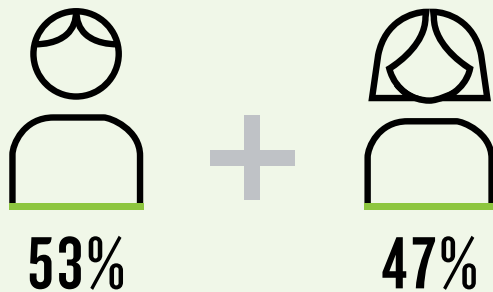
Source: Source: Nielsen Audio National Regional Database (NRD), Spring 2019, Mon-Sun 5am-12mid

NETWORK RADIO LISTENERS 18-49



94% OF RADIO LISTENERS 18-49 TUNE TO NETWORK-AFFILIATED STATIONS EACH WEEK

COMPOSITION OF P18-49 NETWORK AFFILIATE LISTENERS



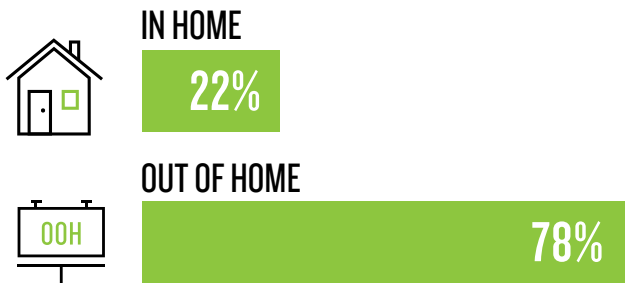
HOUSEHOLD INCOME

\$75K+	38%
\$50K - \$75K	22%
\$25K - \$50K	25%
<\$25K	15%

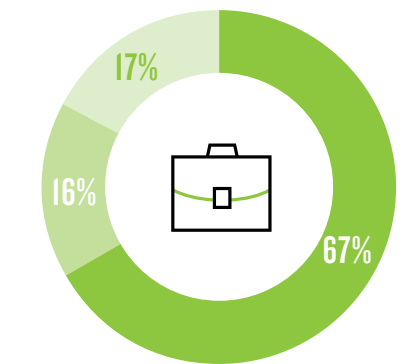
EDUCATION

COLLEGE GRAD	27%
SOME COLLEGE	35%
NO COLLEGE	38%

LISTENING LOCATION



WORK

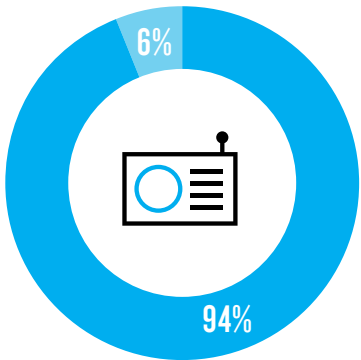


FULL-TIME **PART-TIME**

NOT EMPLOYED FULL- OR PART-TIME (INCL. RETIRED, STUDENT, ETC.)

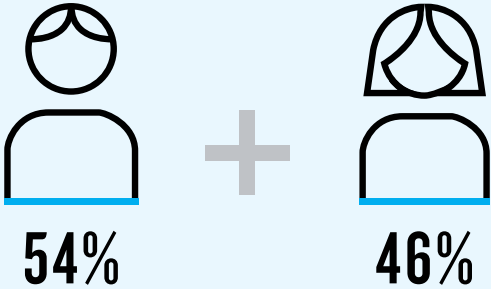
Source: Source: Nielsen Audio National Regional Database (NRD), Spring 2019, Mon-Sun 5am-12mid

NETWORK RADIO LISTENERS 25-54



94% OF RADIO LISTENERS 25-54 TUNE TO NETWORK-AFFILIATED STATIONS EACH WEEK

COMPOSITION OF P25-54 NETWORK AFFILIATE LISTENERS



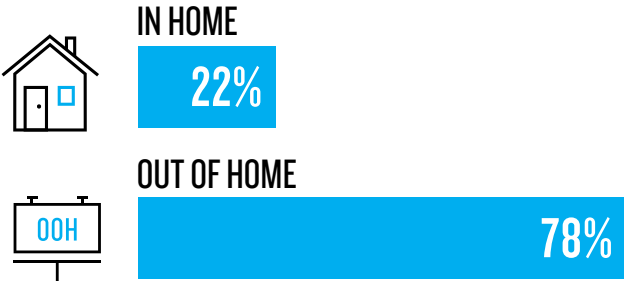
HOUSEHOLD INCOME

\$75K+	41%
\$50K - \$75K	22%
\$25K - \$50K	23%
<\$25K	14%

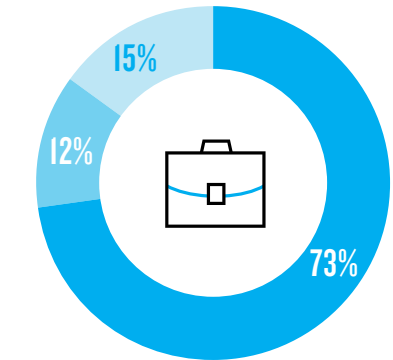
EDUCATION

COLLEGE GRAD	31%
SOME COLLEGE	34%
NO COLLEGE	35%

LISTENING LOCATION



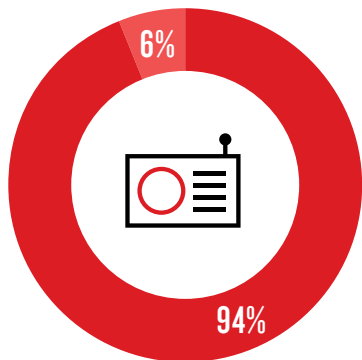
WORK



FULL-TIME **PART-TIME**
NOT EMPLOYED FULL- OR PART-TIME (INCL. RETIRED, STUDENT, ETC.)

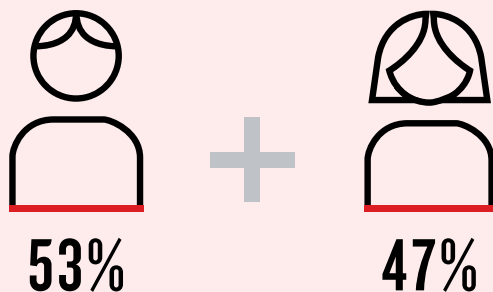
Source: Source: Nielsen Audio National Regional Database (NRD), Spring 2019, Mon-Sun 5am-12mid

NETWORK RADIO LISTENERS 35-49



94% OF RADIO LISTENERS 35-49 TUNE TO NETWORK-AFFILIATED STATIONS EACH WEEK

COMPOSITION OF P35-49 NETWORK AFFILIATE LISTENERS



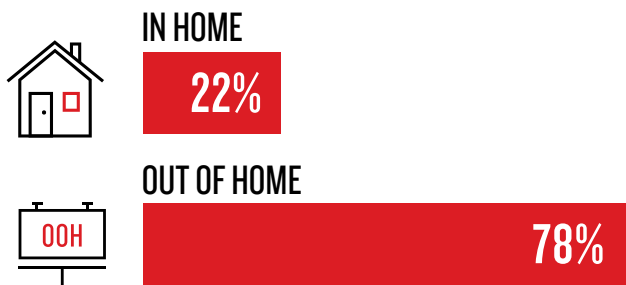
HOUSEHOLD INCOME

\$75K+	43%
\$50K - \$75K	21%
\$25K - \$50K	22%
<\$25K	13%

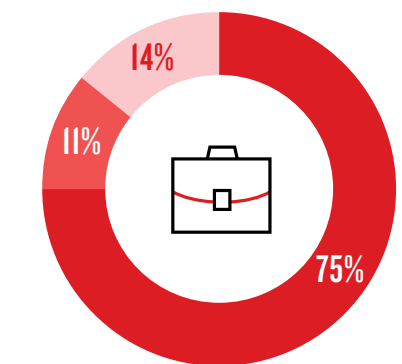
EDUCATION

COLLEGE GRAD	32%
SOME COLLEGE	34%
NO COLLEGE	34%

LISTENING LOCATION



WORK

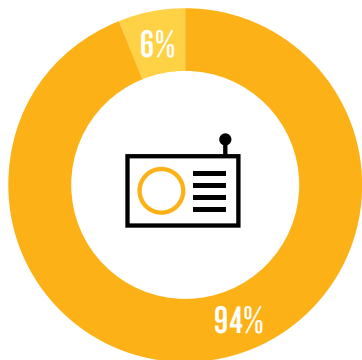


FULL-TIME **PART-TIME**

NOT EMPLOYED FULL- OR PART-TIME (INCL. RETIRED, STUDENT, ETC.)

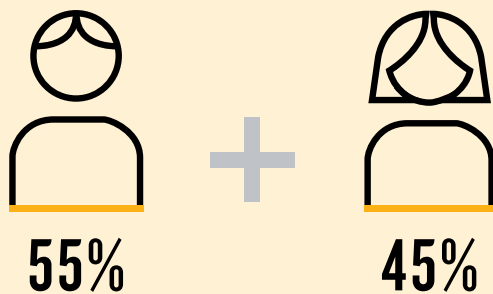
Source: Source: Nielsen Audio National Regional Database (NRD), Spring 2019, Mon-Sun 5am-12mid

NETWORK RADIO LISTENERS 50-64



94% OF RADIO LISTENERS 50-64 TUNE TO NETWORK-AFFILIATED STATIONS EACH WEEK

COMPOSITION OF P50-64 NETWORK AFFILIATE LISTENERS



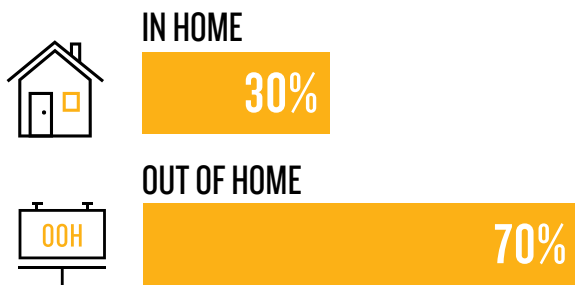
HOUSEHOLD INCOME

\$75K+	43%
\$50K - \$75K	22%
\$25K - \$50K	22%
<\$25K	14%

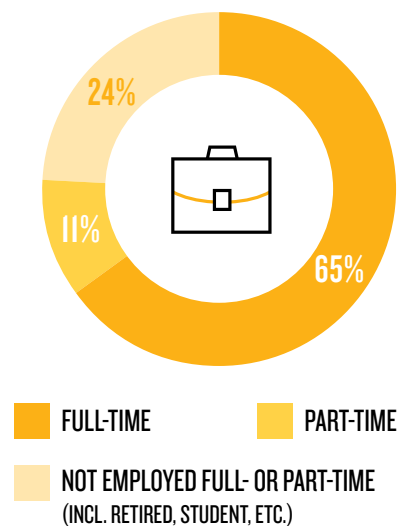
EDUCATION

COLLEGE GRAD	27%
SOME COLLEGE	36%
NO COLLEGE	37%

LISTENING LOCATION

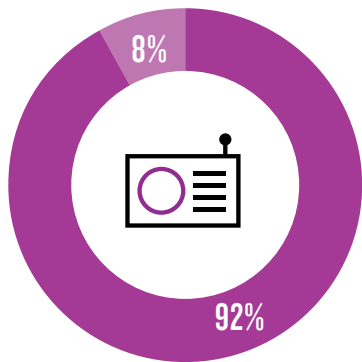


WORK



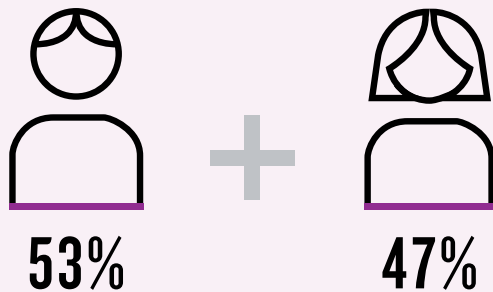
Source: Source: Nielsen Audio National Regional Database (NRD), Spring 2019, Mon-Sun 5am-12mid

NETWORK RADIO LISTENERS 50+



92% OF RADIO LISTENERS 50+ TUNE TO NETWORK-AFFILIATED STATIONS EACH WEEK

COMPOSITION OF P50+ NETWORK AFFILIATE LISTENERS



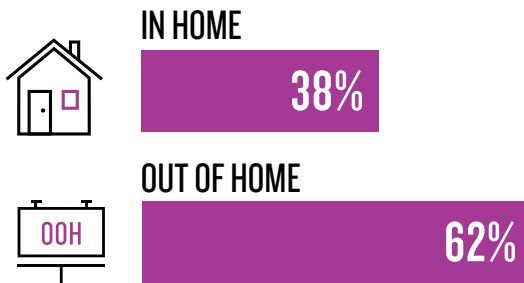
HOUSEHOLD INCOME

\$75K+	37%
\$50K - \$75K	22%
\$25K - \$50K	25%
<\$25K	17%

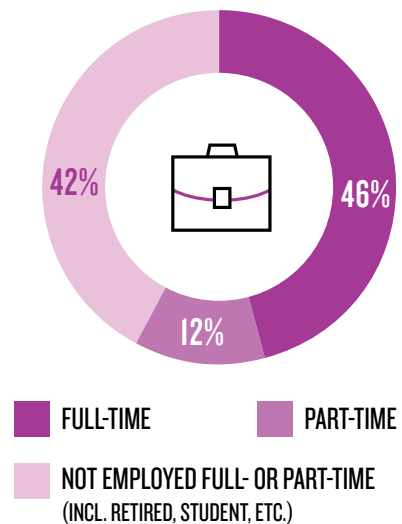
EDUCATION

COLLEGE GRAD	27%
SOME COLLEGE	35%
NO COLLEGE	37%

LISTENING LOCATION

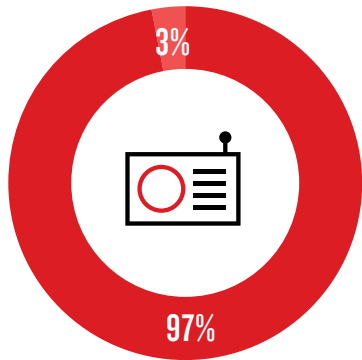


WORK



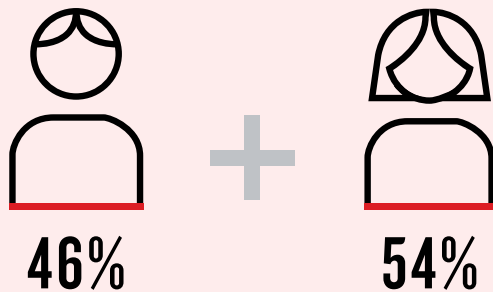
Source: Source: Nielsen Audio National Regional Database (NRD), Spring 2019, Mon-Sun 5am-12mid

BLACK (12+) NETWORK RADIO LISTENERS



97% OF BLACK RADIO LISTENERS TUNE TO NETWORK-AFFILIATED STATIONS EACH WEEK

COMPOSITION OF BLACK NETWORK AFFILIATE LISTENERS



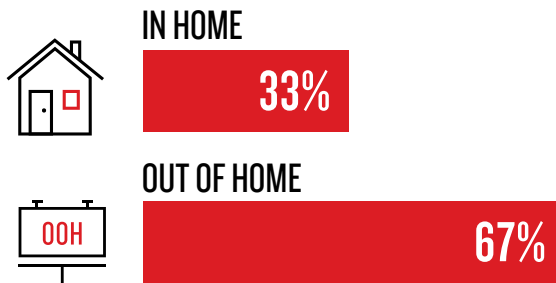
HOUSEHOLD INCOME

\$75K+	28%
\$50K - \$75K	20%
\$25K - \$50K	29%
<\$25K	23%

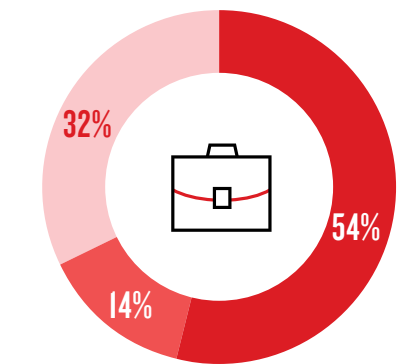
EDUCATION

COLLEGE GRAD	23%
SOME COLLEGE	38%
NO COLLEGE	39%

LISTENING LOCATION



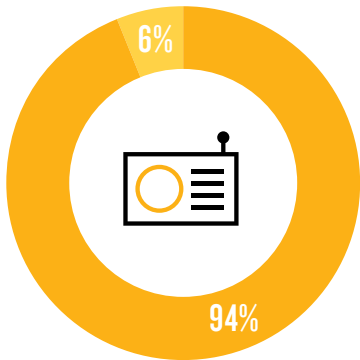
WORK



FULL-TIME **PART-TIME**
NOT EMPLOYED FULL- OR PART-TIME (INCL. RETIRED, STUDENT, ETC.)

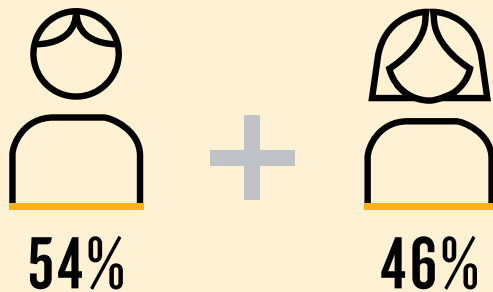
Source: Source: Nielsen Audio National Regional Database (NRD), Spring 2019, Mon-Sun 5am-12mid
Black Differential Survey Treatment (DST) Markets (128)

HISPANIC (12+) NETWORK RADIO LISTENERS



94% OF HISPANIC RADIO LISTENERS TUNE TO NETWORK-AFFILIATED STATIONS EACH WEEK

COMPOSITION OF HISPANIC NETWORK AFFILIATE LISTENERS



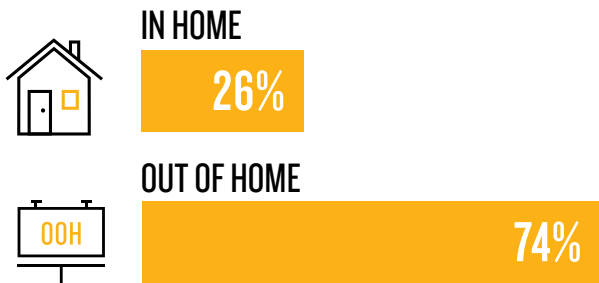
HOUSEHOLD INCOME

\$75K+	28%
\$50K - \$75K	20%
\$25K - \$50K	31%
<\$25K	21%

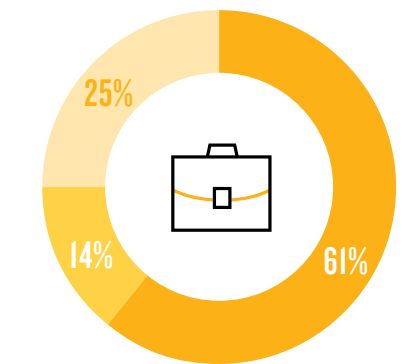
EDUCATION

COLLEGE GRAD	19%
SOME COLLEGE	31%
NO COLLEGE	51%

LISTENING LOCATION



WORK



FULL-TIME **PART-TIME**

NOT EMPLOYED FULL- OR PART-TIME (INCL. RETIRED, STUDENT, ETC.)

Source: Source: Nielsen Audio National Regional Database (NRD), Spring 2019, Mon-Sun 5am-12mid
Hispanic Differential Survey Treatment (DST) Markets (110)

SOURCING & METHODOLOGIES

SOURCING

Nielsen RADAR 142, September 2019

Nielsen National Regional Database, Spring 2019

Nielsen Total Audience Report Q2 2019, including Universe Estimates (UEs)

Nielsen MediaTech Trender Q2 2018

METHODOLOGIES

Affiliate lists for the 'network-affiliated' station groups used in this report are provided to Nielsen by the Network Radio Research Council. 9,139 stations were used to create this station group in the database.

Radio as defined in this report includes listening to AM/FM radio stations, digital streams of AM/FM stations (where captured in diary markets or encoded in PPM markets), HD radio stations, and satellite radio as captured in diary markets only. No other forms of radio or audio are included at this time.

Nielsen's MediaTech Trender is a quarterly consumer tracking study launched in Q2 2019 by Nielsen Media Analytics. The online survey is offered in both English and Spanish to a U.S. general population sample 13 years and older.

Nielsen's Portable People Meter (PPM) technology surveys respondents in the top 48 radio metros in the United States as of the Spring 2019 survey.

Nielsen's Diary service surveys respondents in the remaining 210 radio metros in the United States as of the Spring 2019 survey.

Data used in this report is inclusive of multicultural audiences. Hispanic consumer audiences are comprised of both English and Spanish speaking representative populations.

Composition percentages may not add to 100% due to rounding.

ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a global measurement and data analytics company that provides the most complete and trusted view available of consumers and markets worldwide. Our approach marries proprietary Nielsen data with other data sources to help clients around the world understand what's happening now, what's happening next, and how to best act on this knowledge. For more than 90 years Nielsen has provided data and analytics based on scientific rigor and innovation, continually developing new ways to answer the most important questions facing the media, advertising, retail and fast-moving consumer goods industries. An S&P 500 company, Nielsen has operations in over 100 countries, covering more than 90% of the world's population. For more information, visit www.nielsen.com.



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