

Client report

Audio today 2023

How America listens

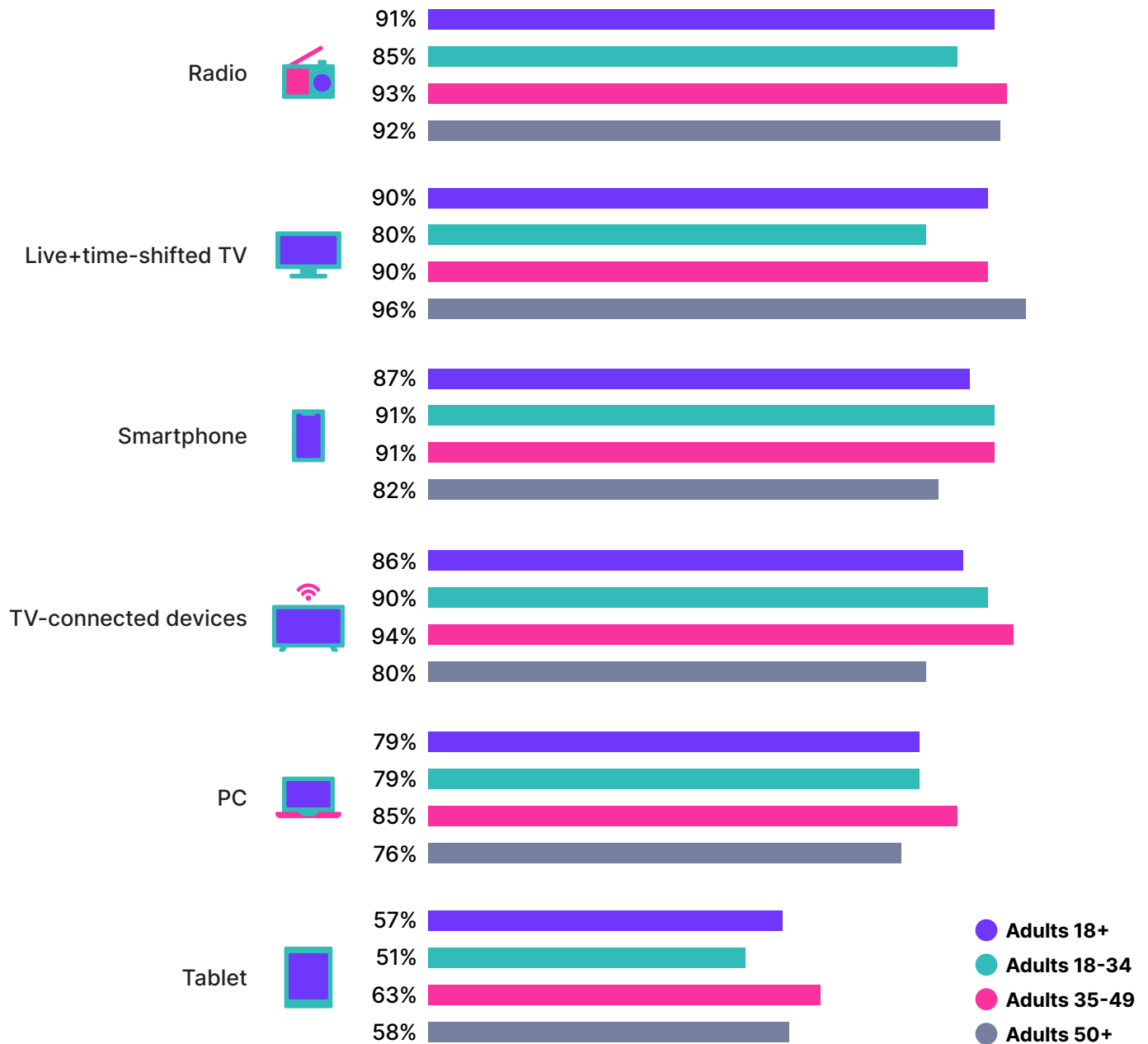
June 2023



Comparing monthly reach

U.S. monthly reach

Percent of population



Source: Nielsen NPOWER, Nielsen RADAR, Nielsen Total Media Fusion - Q4 2022



Year after year, radio continues to reach more American consumers than any other platform, linear or digital.



Monthly reach % among U.S. population

	Black 18+	Black 18-34	Black 35-49	Black 50+
Radio	91%	85%	93%	92%
Live+time-shifted TV	92%	83%	94%	97%
Smartphone	86%	89%	90%	82%
TV-connected devices	87%	89%	93%	81%
PC	73%	76%	81%	66%
Tablet	51%	47%	56%	52%

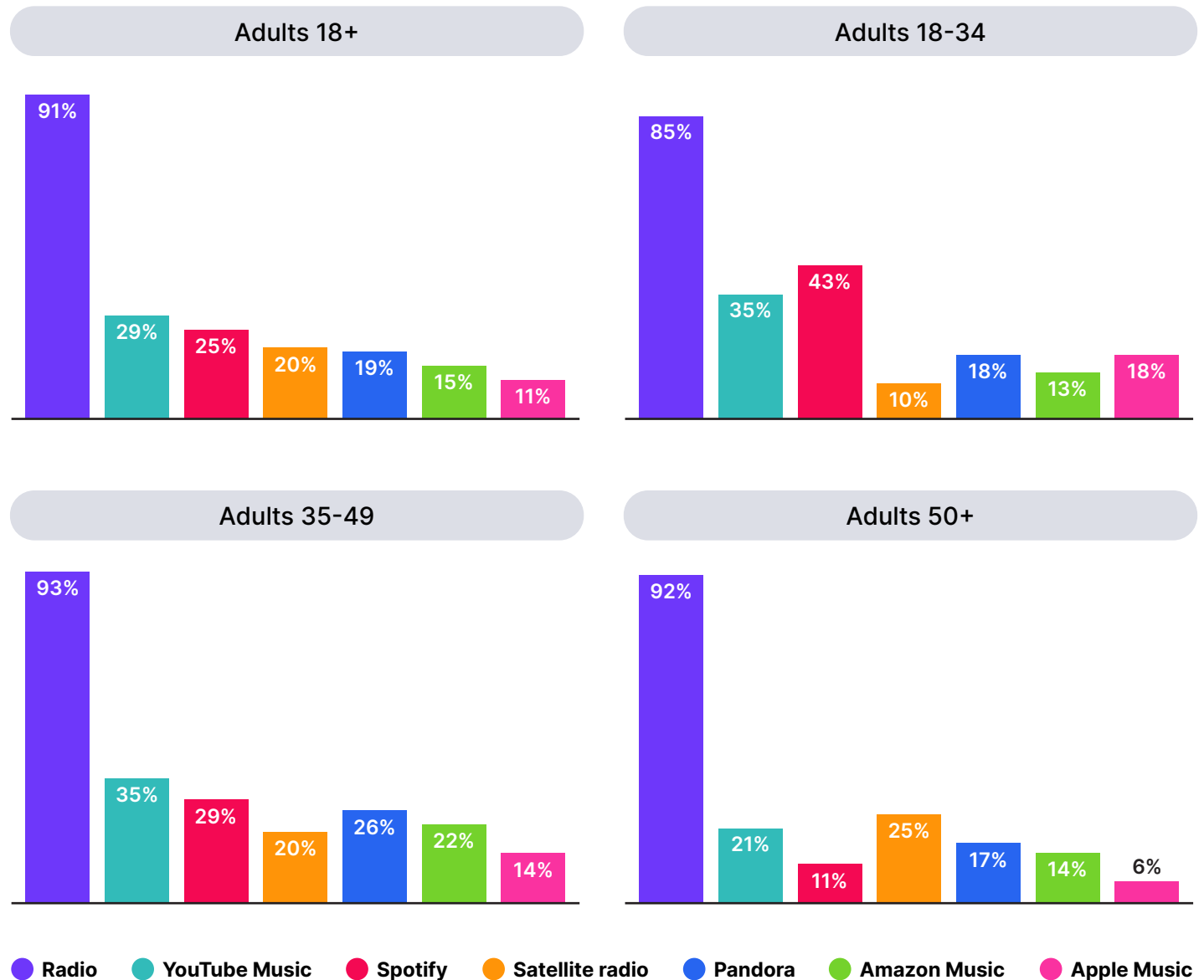
	Hispanic 18+	Hispanic 18-34	Hispanic 35-49	Hispanic 50+
Radio	95%	92%	97%	97%
Live+time-shifted TV	87%	79%	89%	95%
Smartphone	89%	92%	91%	82%
TV-connected devices	88%	89%	92%	81%
PC	68%	71%	73%	58%
Tablet	54%	51%	61%	52%

Source: Nielsen NPOWER, Nielsen RADAR, Nielsen Total Media Fusion - Q4 2022

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

All audio services (ad-free and ad-supported)

Monthly reach % among U.S. population



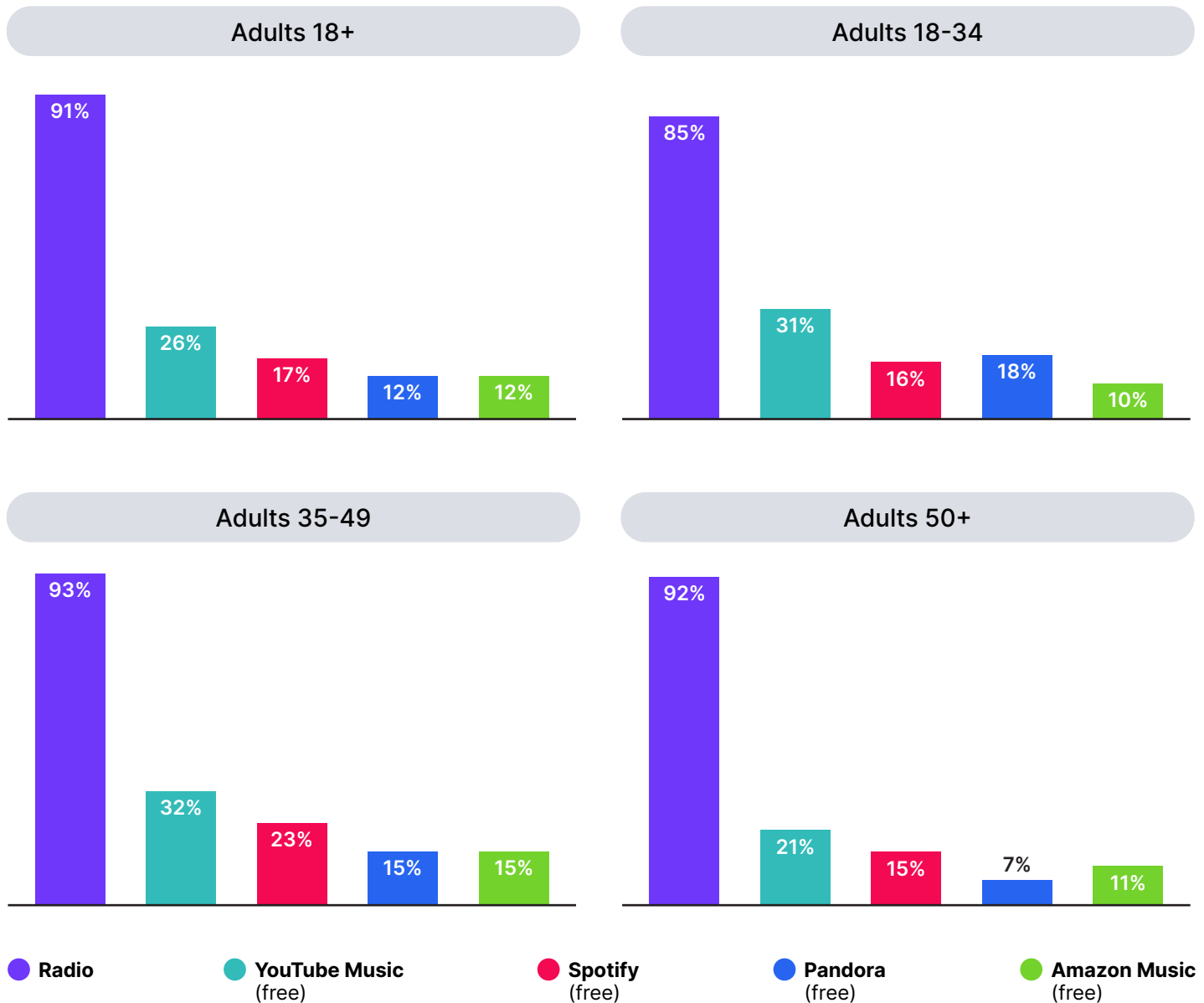
Source: Nielsen RADAR Q4 2022, Nielsen Scarborough USA+ Rel 2 2022, current 6 months



Radio's impact is even more pronounced when comparing reach among ad-supported options for audio marketing campaigns.

Ad-supported audio

Monthly reach % among U.S. population



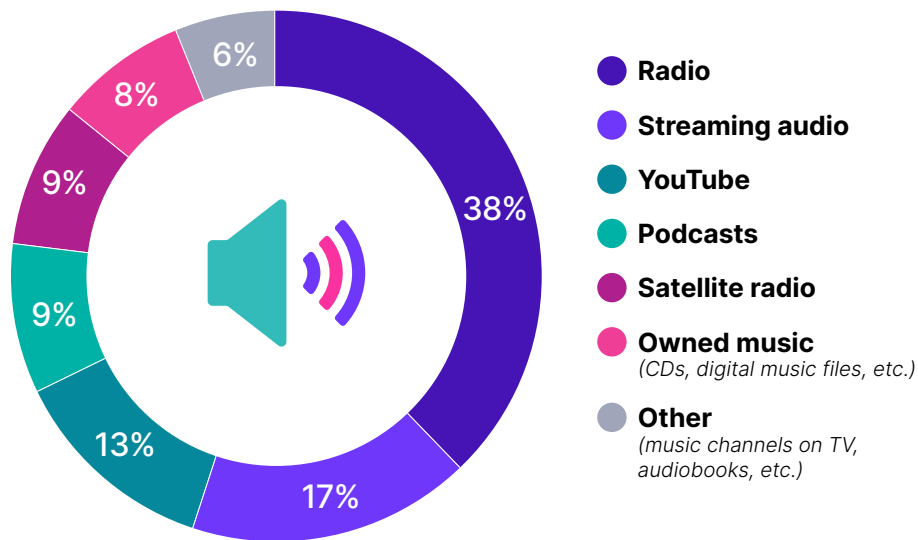
Source: Nielsen RADAR Q4 2022, Nielsen Scarborough USA+ Rel 2 2022, current 6 months

Radio also leads all audio sources in share of time spent listening

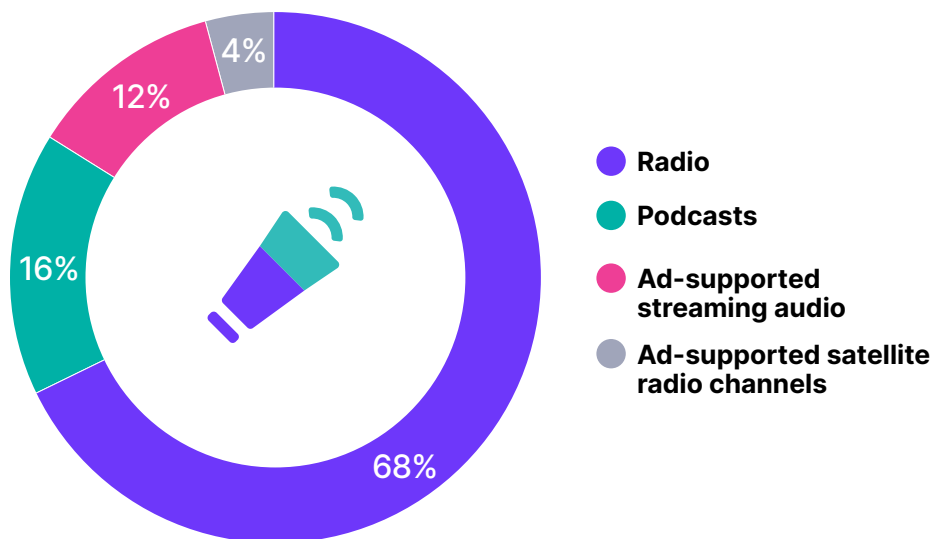
Similar to the reach comparisons, radio's impact is also more pronounced when comparing time spent with ad-supported audio.

Share of Ear®

Share of daily time spent listening to all audio sources among U.S. population, adults 18+



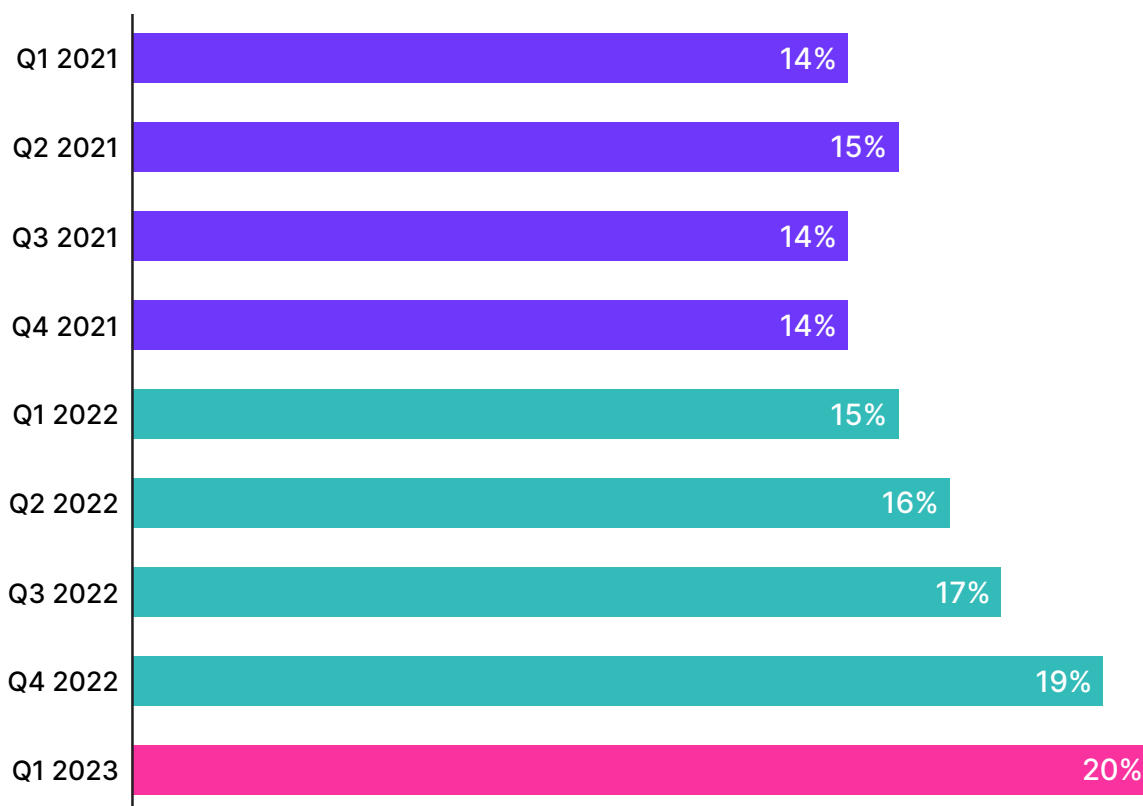
Share of daily time spent listening to ad-supported audio sources among U.S. population, adults 18+



Source: Edison Research, "Share of Ear," Q1 2023; Persons 18+

Streaming continues to account for a larger share of time spent with radio

Percent of AM/FM radio time spent with digital streams of broadcast stations
Adults 25-54



Source: Edison Research, "Share of Ear," Q1 2021-Q1 2023; Persons 25-54

Today, 20% of the time spent with AM/FM radio occurs via streaming.



Radio use spans the bulk of the day, reaching consumers on the path to purchase; it is the dominant audio source in the car.

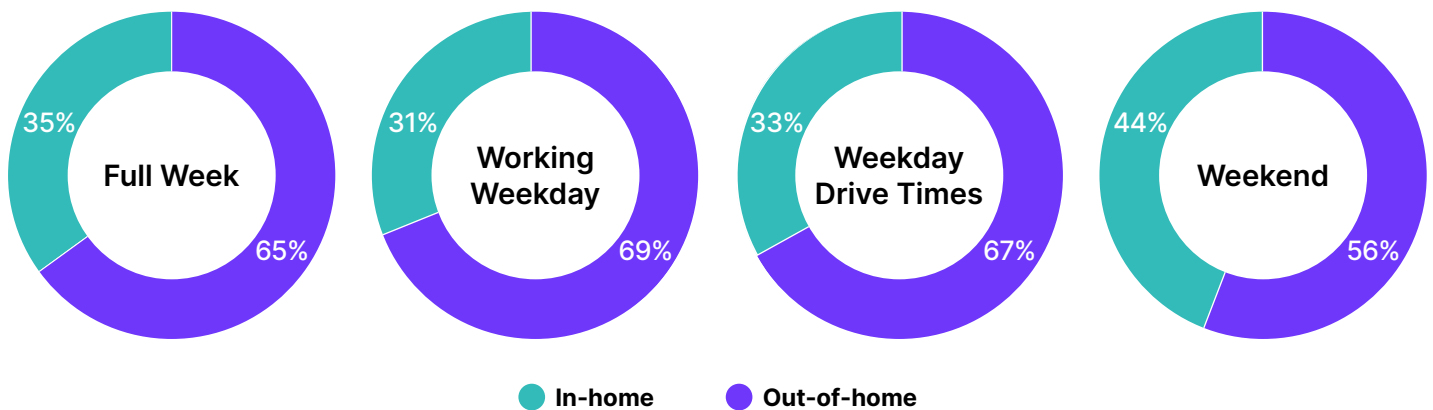
A daily habit for millions, radio is a particularly effective medium for advertisers due to its legacy of reaching listeners during the prime hours of the day while they are out of home and closest to the point of purchase (commuting, working, shopping). Furthermore, radio is also the top audio source in the car. More than 60% of all time spent with audio in vehicles goes to AM/FM radio as of the Q1 2023 Edison Share of Ear study.



Nearly three-quarters (73%) of all radio use during morning and afternoon drive happens in the car.



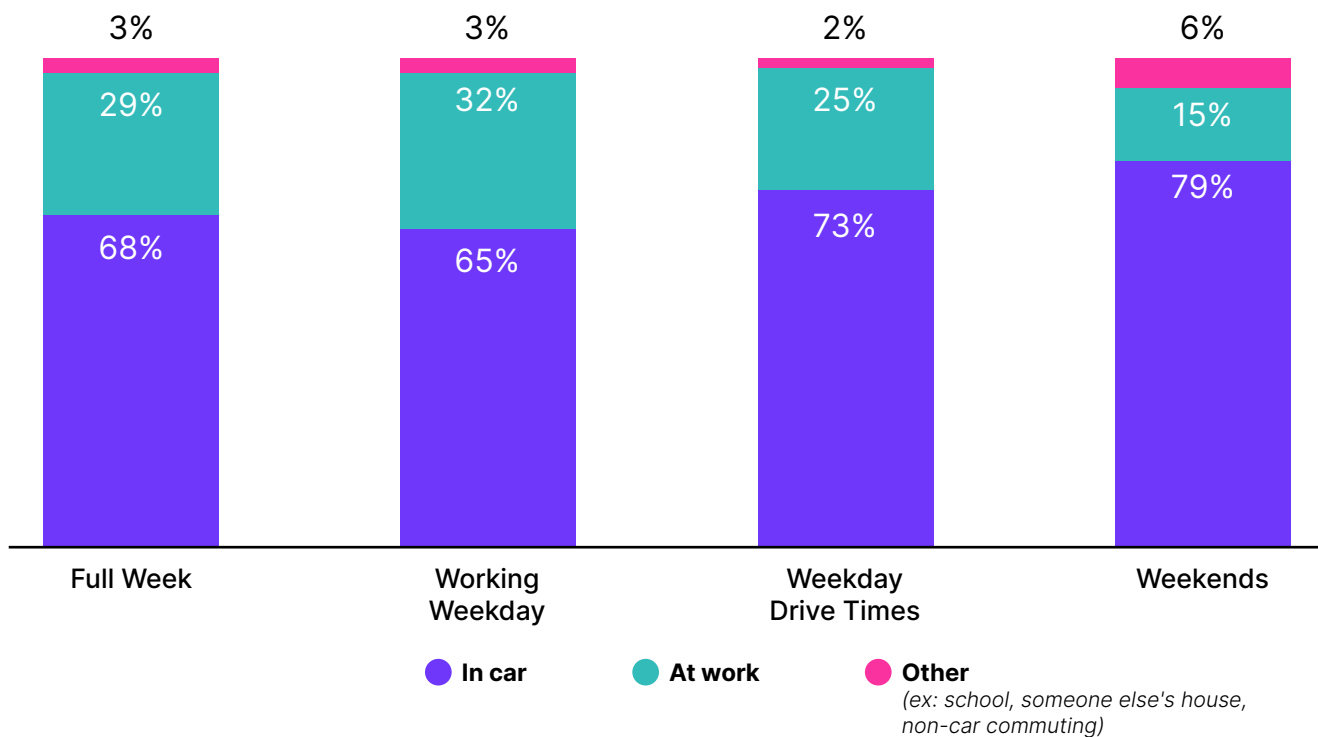
Consumers use radio when they're away from home



Source: Nielsen National Regional Database, Adults 18+ - Q4 2022

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 2022

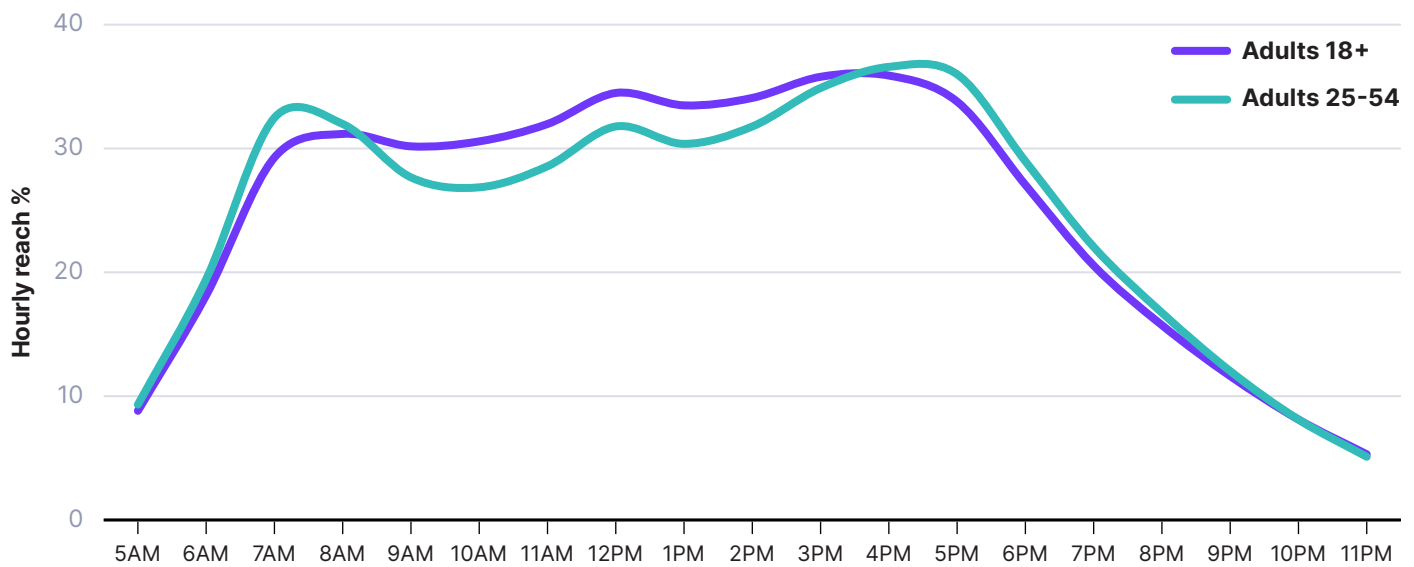


AM radio has been in the news this year and is a powerful example of radio's importance while out of the house. One in three American radio listeners use AM stations each month, and while a quarter (26%) of AM listening happens at home, three-quarters of it (74%) is done in the car.

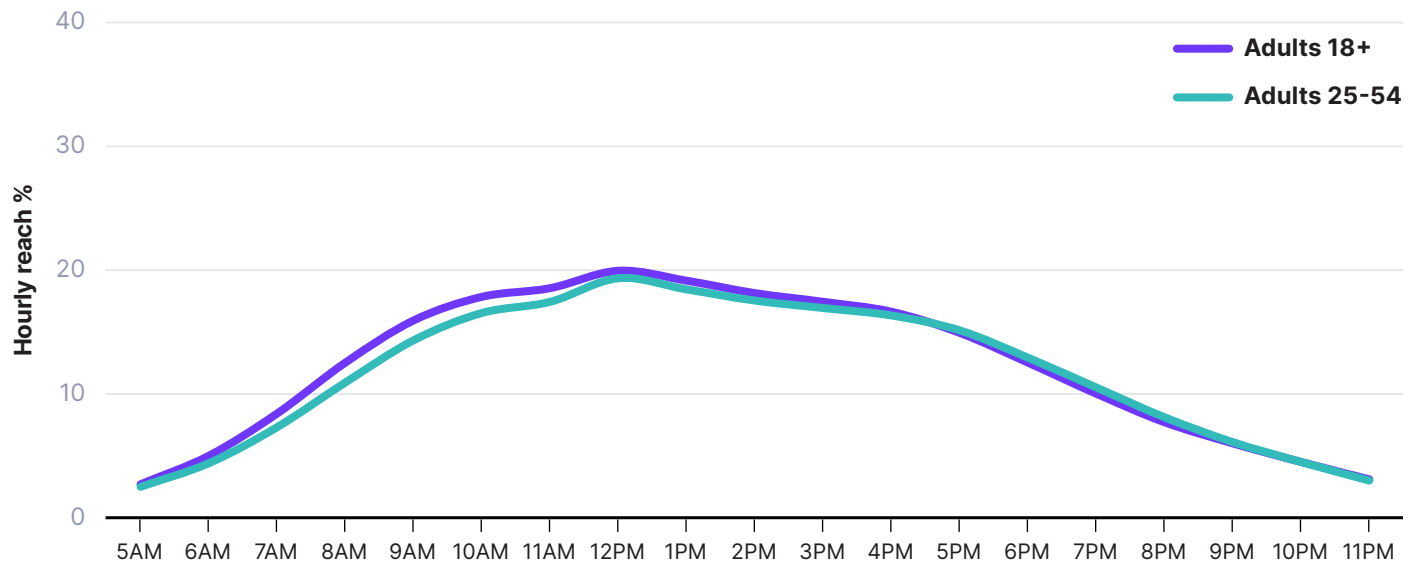
Radio's share of total time spent with media during the week is highest during morning drive and mid-day, while overall listening peaks in the afternoon hours (between 3-5pm).



Monday-Friday



Saturday-Sunday

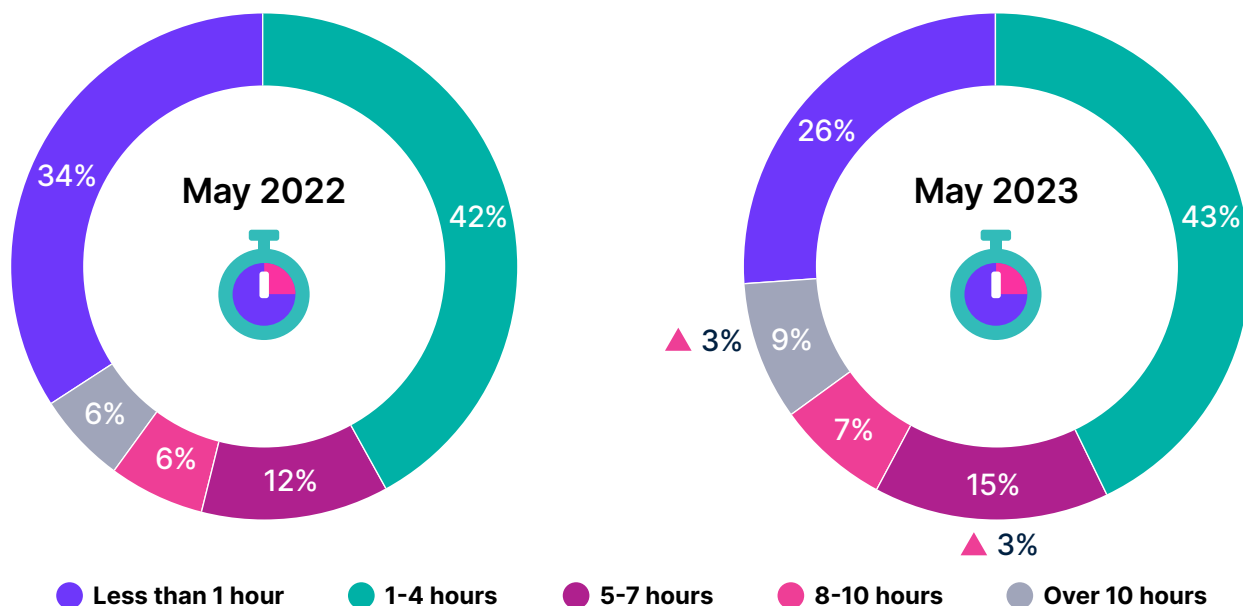


Source: Nielsen National Regional Database - Q4 2022

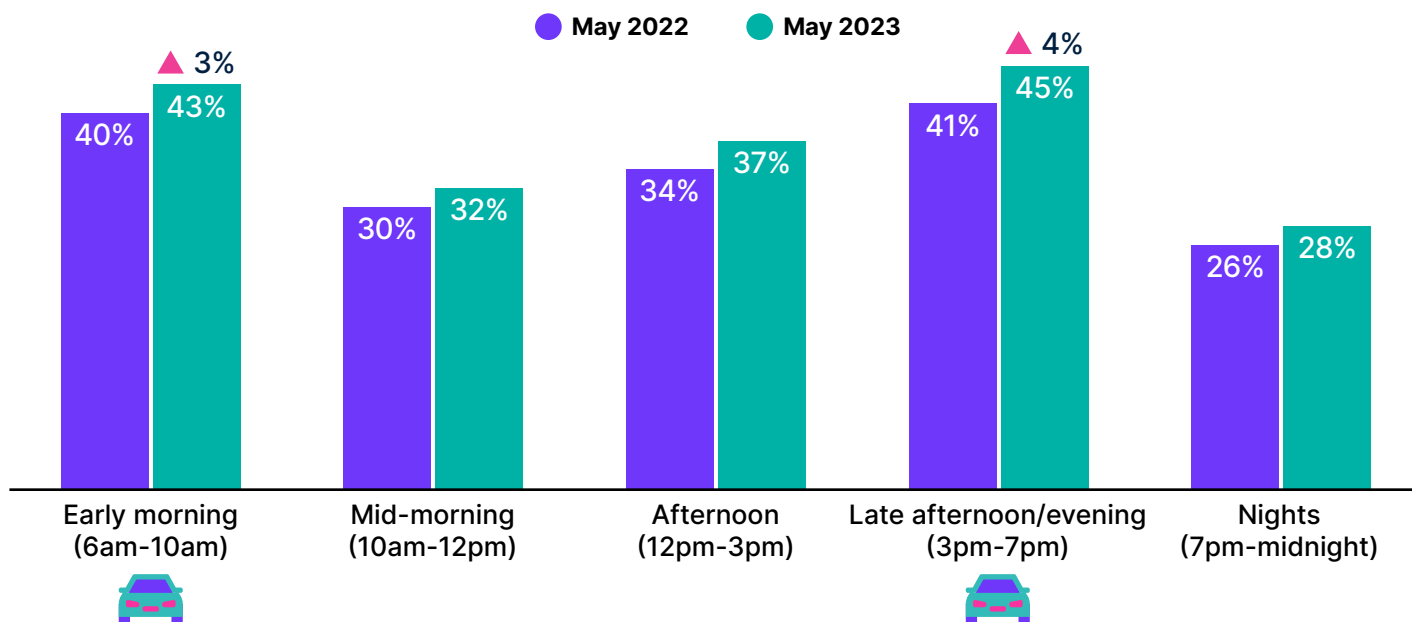
Podcasting today – shifting listening habits

Podcast consumers are shifting their habits to listen more while commuting and traveling (most often during the traditional 'drive times' during the work week). At the same time, heavier podcast usage is growing (5 or more weekly hours of listening time) while lighter usage is in decline (less than an hour per week).

Time spent listening to podcasts in typical week



Time of day typically listen to podcasts (weekdays)



Source: Nielsen Scarborough Podcast Buying Power, R2 2021 (May 2022) to R2 2022 (May 2023), Adults 18+



Comedy and news remain the top genres, but Society & Culture, Education and History saw significant growth this year.



Podcast genres	May 2022 listeners	May 2023 listeners (ranked)	Change
Comedy	28,352,766	28,037,106	-1%
News	26,833,659	23,858,773	-11%
Society & Culture	20,783,814	23,376,726	12%
True Crime	21,459,366	20,794,054	-3%
Education	18,467,876	19,281,312	4%
History	16,008,297	16,537,133	3%
Health & Fitness	16,384,006	16,368,138	0%
Music	18,599,331	15,095,480	-19%
Business	15,764,171	14,904,118	-5%
TV & Film	14,247,218	14,419,471	1%
Science	14,340,767	14,358,399	0%
Sports	15,674,020	14,076,280	-10%
Arts	14,457,069	12,866,196	-11%
Religion & Spirituality	11,522,794	11,680,003	1%
Leisure	13,772,565	11,462,748	-17%
Fiction	11,271,885	10,863,847	-4%
Government	11,447,087	10,385,015	-9%
Technology	10,860,362	9,620,221	-11%
Kids & Family	6,472,359	6,033,898	-7%

Source: Nielsen Scarborough Podcast Buying Power, R2 2021 (May 2022) to R2 2022 (May 2023), Adults 18+


Appendix

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



Monthly radio reach and top formats

Adults 18+




Monthly reach (000)
231,773
91% of population

Top 3 formats (audience share)

1	Country	13.1%
2	News/Talk	12.4%
3	AC	8.4%

Teens 12-17




Monthly reach (000)
20,990
84% of Teens

Top 3 formats (audience share)

1	Pop CHR	13.6%
2	Country	12.8%
3	AC	10.3%

Black 18+




Monthly reach (000)
29,990
90% of population

Top 3 formats (audience share)

1	Urban AC R&B	31.1%
2	Urban Contemporary Hip-Hop/R&B	19.2%
3	AC	5.5%

Black Teens 12-17



Monthly reach (000)
3,499
89% of Black Teens

Top 3 formats (audience share)

1	Urban Contemporary Hip-Hop/R&B	29.9%
2	Urban AC R&B	20.5%
3	AC	9.3%

Hispanic 18+




Monthly reach (000)
40,849
95% of population

Top 3 formats (audience share)

1	Mexican Regional	14.7%
2	Spanish Contemporary + Spanish Hot AC	10.5%
3	AC	8.5%

Hispanic Teens 12-17



Monthly reach (000)
5,873
97% of Hispanic Teens

Top 3 formats (audience share)

1	Mexican Regional	11.7%
2	Pop CHR	11.4%
3	Spanish Contemporary + Spanish Hot AC	9.4%


Nielsen RADAR 156 Mar 2023 (Contiguous U.S.) + Nielsen National Regional Database Q4 2022 (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 (continued)

Adults 18-34




Monthly reach (000)
63,175
83% of population

Top 3 formats (audience share)

1	Country	15.2%
2	Pop CHR	11.2%
3	AC	8.3%

Adults 25-54




Monthly reach (000)
114,846
91% of population

Top 3 formats (audience share)

1	Country	13.3%
2	AC	8.4%
3	Pop CHR	7.7%

Black Adults 18-34




Monthly reach (000)
9,324
87% of population

Top 3 formats (audience share)

1	Urban Contemporary Hip-Hop/R&B	30.7%
2	Urban AC R&B	21.9%
3	Rhythmic CHR	8.8%

Black Adults 25-54




Monthly reach (000)
16,041
90% of population

Top 3 formats (audience share)

1	Urban AC R&B	27.7%
2	Urban Contemporary Hip-Hop/R&B	25.3%
3	Rhythmic CHR	7.2%

Hispanic Adults 18-34




Monthly reach (000)
16,631
92% of population

Top 3 formats (audience share)

1	Mexican Regional	12.9%
2	Pop CHR	9.4%
3	Spanish Contemporary + Spanish Hot AC	8.9%

Hispanic Adults 25-54



Monthly reach (000)
25,286
96% of population


Top 3 formats (audience share)

1	Mexican Regional	16.4%
2	Spanish Contemporary + Spanish Hot AC	10.8%
3	AC	8.3%

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Monthly radio reach and top formats (continued)

Adults 18-49




Monthly reach (000)
120,869
89% of population

Top 3 formats (audience share)

1	Country	13.8%
2	Pop CHR	9.1%
3	AC	8.4%

Adults 25-54




Monthly reach (000)
114,846
91% of population

Top 3 formats (audience share)

1	Country	13.3%
2	AC	8.4%
3	Pop CHR	7.7%

Women 18-49




Monthly reach (000)
60,716
89% of population

Top 3 formats (audience share)

1	Country	14.4%
2	Pop CHR	11.3%
3	AC	10.3%

Women 25-54




Monthly reach (000)
57,830
91% of population

Top 3 formats (audience share)

1	Country	14.1%
2	AC	10.5%
3	Pop CHR	9.6%

Men 18-49




Monthly reach (000)
60,148
89% of population

Top 3 formats (audience share)

1	Country	13.2%
2	Classic Rock	8.5%
3	News/Talk	7.5%

Men 25-54



Monthly reach (000)
57,013
92% of population

Top 3 formats (audience share)

1	Country	12.6%
2	News/Talk	9.1%
3	Classic Rock	8.9%

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Top 20 AM/FM Radio formats

(ranked by reach)



		Monthly reach (000)	Median age	% Employed (full or part time)	Average HH size	% of HHs with children under 18
1	AC	53,736	50	65%	3.1	34%
2	Country	51,386	49	64%	3.0	36%
3	News/Talk	42,650	58	61%	2.7	25%
4	Pop CHR	40,684	38	74%	3.4	47%
5	Classic Hits	39,625	54	62%	2.9	28%
6	Classic Rock	36,867	52	67%	3.0	32%
7	Hot AC	31,617	43	73%	3.2	42%
8	All Sports	19,785	52	69%	2.9	31%
9	Contemporary Christian	19,655	49	67%	3.2	42%
10	Adult Hits/80s Hits	17,607	46	71%	3.1	36%
11	Urban AC R&B	17,379	51	60%	3.0	33%
12	Urban Contemporary Hip-Hop/R&B	17,094	39	69%	3.2	45%
13	Alternative	15,257	39	76%	3.1	40%
14	Rhythmic CHR	14,708	36	74%	3.5	50%
15	Active Rock	10,330	43	77%	3.1	40%
16	Spanish Contemporary + Spanish Hot AC	10,204	42	72%	3.8	51%
17	Mexican Regional	9,388	43	68%	3.9	52%
18	AOR + MainstreamRock	8,679	47	72%	3.0	38%
19	All News	8,625	58	61%	2.9	26%
20	Classical	7,455	60	54%	2.6	23%

Source: Nielsen National Regional Database Q4 2022, Adults 18+. M-SU 12M-12M

Age, Employment, HHLD size and % w Children via Nielsen Scarborough USA+ Rel 2 2022, current 6 months, Adults 18+.

AC stands for Adult Contemporary | CHR stands for Contemporary Hit Radio | AOR stands for Album Oriented Rock; 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

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