



JULY 2021

# CONSUMERS ARE READY TO GO, SPEND & LISTEN

AUDIO TODAY 2021



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What a difference one year makes.

At this point in 2020 we still didn't know what we didn't know about COVID and how it would touch all parts of society. We had traversed the first wave of the pandemic and emerged into a summer unlike any other in recent memory. BUT, we still had a long winter ahead with high levels of uncertainty around everything from vaccines (remember, they didn't even exist yet) to the job market to what the morning commute would be like if and when we returned to the office.

Today, a rising tide of optimism headlines the American experience as we continue to emerge from the disruption caused by the virus. Nielsen's ongoing series of audio consumer sentiment surveys is reporting the **highest levels of consumer confidence that we've heard** since the COVID crisis began.

## **NINE IN TEN NOW FEEL LIFE IS BECOMING MORE NORMAL, AND THEY'RE RESUMING PRE-PANDEMIC ACTIVITIES, SPENDING AND LISTENING**

**Audio use is on the rise.** It's being driven (pun intended) by increasing levels of mobility and traffic on our roadways. Among the employed, two thirds are now working outside the home, up more than 70% since the height of lock-down in the spring of 2020. As a result, the AM/FM Radio audience just recorded its highest levels in over a year across Nielsen's PPM markets. **Radio remains America's top weekly reach medium**, and an essential part of the daily media diet for millions. Listening may have migrated into the home during the past year via smart speaker or mobile device, but now we're tracking the audience shift back to pre-pandemic habits with in-car and out-of-home consumption increasing. All the while, radio's value proposition for marketers hasn't budged: it specializes in reaching consumers who are ready to spend right now, while they're in the marketplace, and does so in a controlled environment which protects the advertiser's reputation. Not only are radio listeners the leading optimists among us, they've also remained more active (and more mobile) throughout the pandemic. They are ready to go and ready to spend; more likely to make major purchases like a house or a new car, as well as across a host of local shopping categories. Read on for more information.

Elsewhere in the audio universe, podcast usage—which flat-lined last year—is also growing again as **millions of new listeners are engaging with the hottest new audio marketing opportunity.** We're approaching ONE MILLION available podcasts, with something literally for everyone including radio broadcasters who are nimbly using on-demand audio as an extension of their on-air brands. The question now is how can advertisers reach the right audience in the right podcast. Nielsen's growing suite of podcast consumer insights is adding to our body of knowledge on the subject with more coming soon from our *Podcasting Today* series.

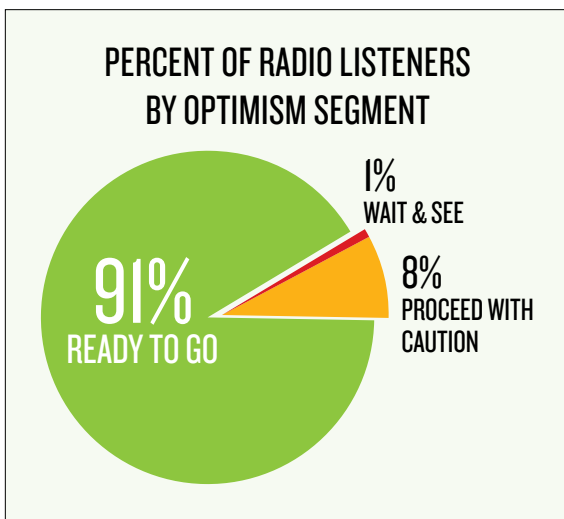
Nobody knows exactly what lies ahead for the rest of this year, but the leading indicators detailed in the following pages are highly encouraging for broadcasters, podcasters, and audiophiles everywhere. Enjoy your summer.

Stay safe,

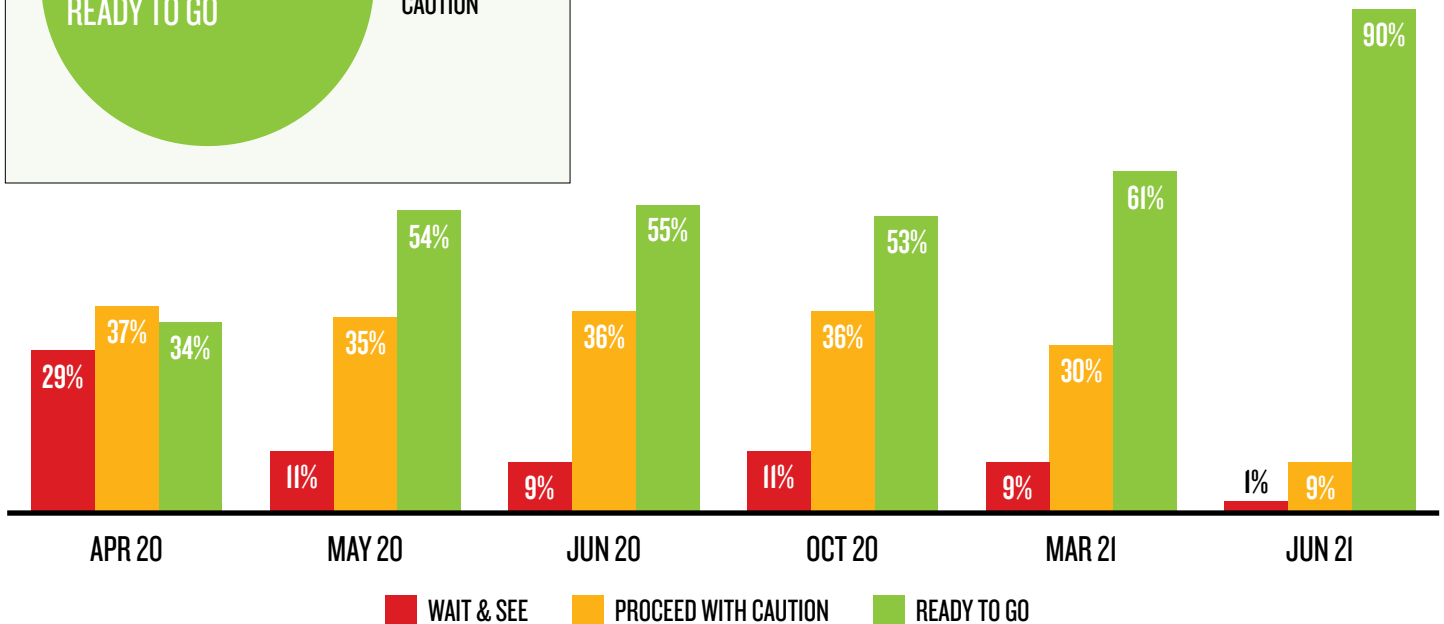
# AUDIO CONSUMER SENTIMENT SURVEY FINDS CONFIDENCE AND RADIO USAGE UP AS WE MOVE TOWARDS NORMALCY

According to the Nielsen Audio Consumer Sentiment survey, consumers eighteen and older now show increased optimism as the COVID crisis abates. The survey looked at three segments reflecting attitudes about the pandemic: People who are “ready to go,” those who “proceed with caution,” and consumers who “wait and see” when it comes to resuming normal activities. In April of last year, during the peak of the lock-down, consumers were roughly equally divided among these groups. However, as restrictions eased a bit, people became more “ready to go” in May, June, and October 2020 and March 2021. Now in June 2021 the “ready to go” segment reached a new high of 90% of American consumers reflecting rising optimism.

## NINE IN TEN ARE NOW “READY TO GO”



**90% OF CONSUMERS FEEL LIFE IS BECOMING MORE NORMAL**

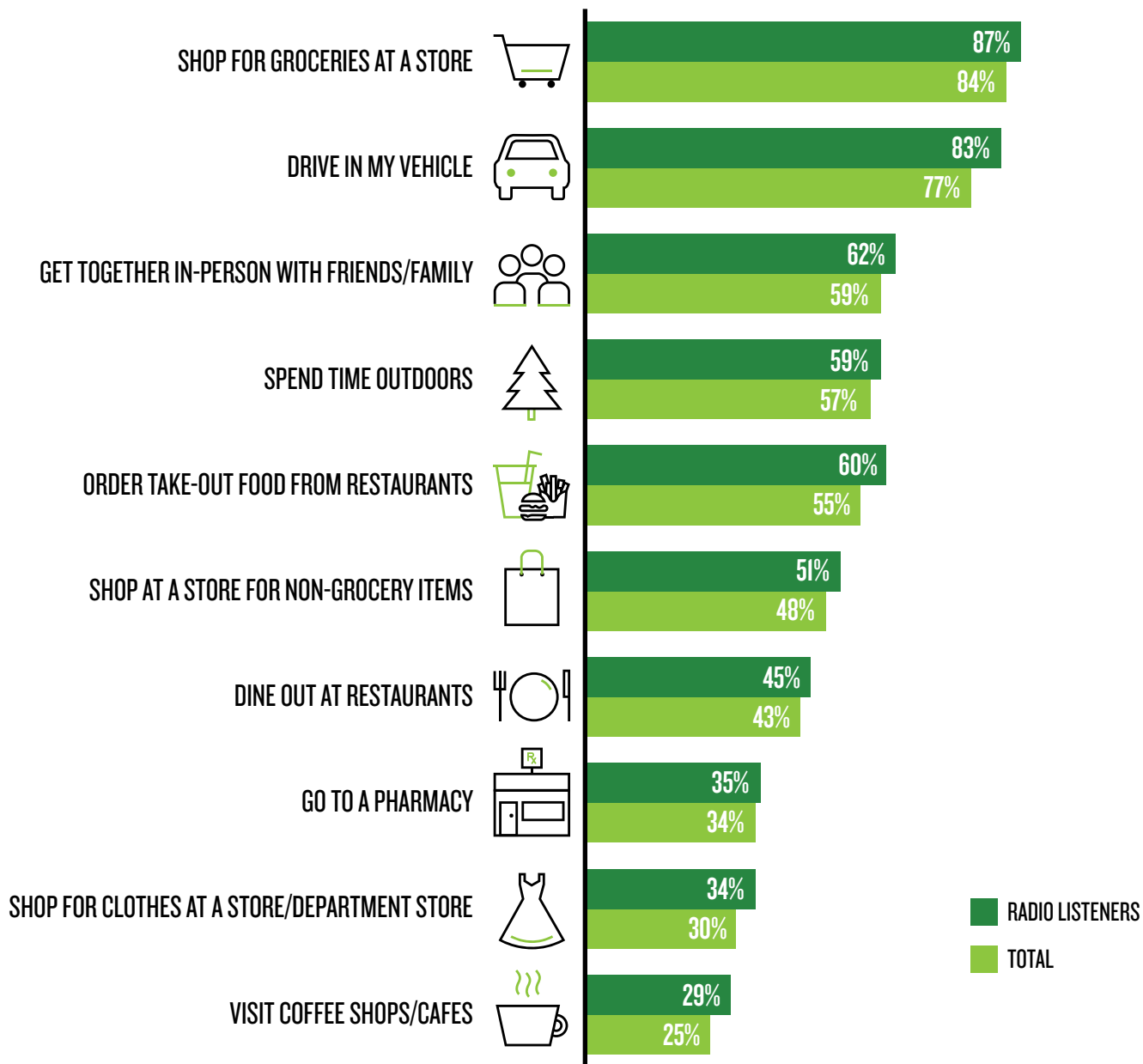


Sources: Custom Nielsen study conducted June 2021 via an online survey, based on a weighted sample of 1000 among P18+ (pie chart). Custom Nielsen study conducted April 2020, May 2020, June 2020, October 2020, March 2021 & June 2021 via an online survey among P18+ (bar chart).

Along the way, radio listeners have consistently been ahead of the curve for being optimistic about recovering from the pandemic, and now 9 in 10 of these consumers are “ready to go.” What’s more, radio audiences are more likely to be out and about and engaging in top weekly activities.

## RADIO LISTENERS ARE HIGHLY ACTIVE AND MOBILE: MORE LIKELY TO ENGAGE IN TOP 10 WEEKLY ACTIVITIES

### ACTIVITIES YOU DID IN THE PAST WEEK



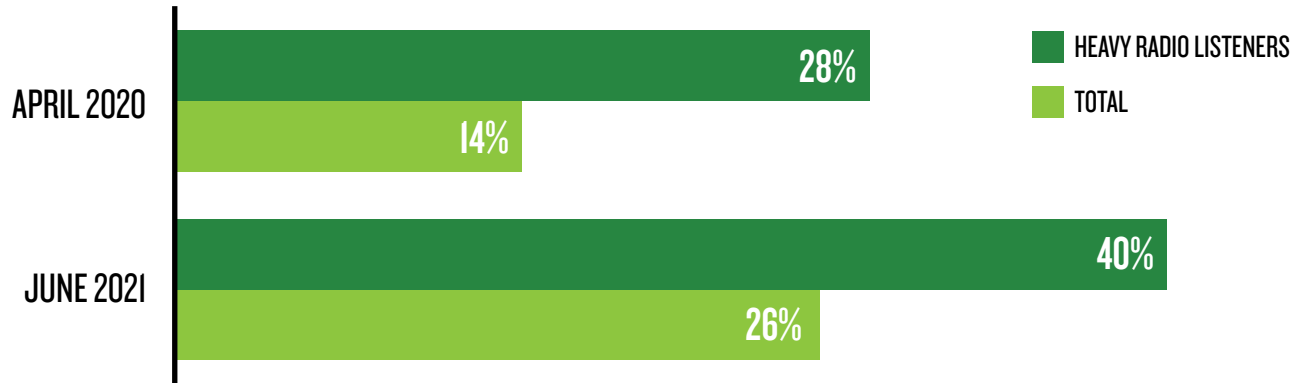
Source: Custom Nielsen study conducted June 2021 via an online survey, based on a weighted sample of 1000 among P18+



More road trips, commuting to work, visiting family and friends and trips to stores means more time spent with audio in the car, where radio commands the biggest share of ear.

## AMERICA IS ON THE MOVE AGAIN

### PERCENT WHO SPENT 1+ HOUR IN CAR/TRUCK YESTERDAY



Source: Custom Nielsen study conducted April 2020 and June 2021 via an online survey, based on a weighted sample of 1000 among P18+



**ONE HOUR+ IN VEHICLES NEARLY DOUBLED SINCE HEIGHT OF LOCKDOWN**



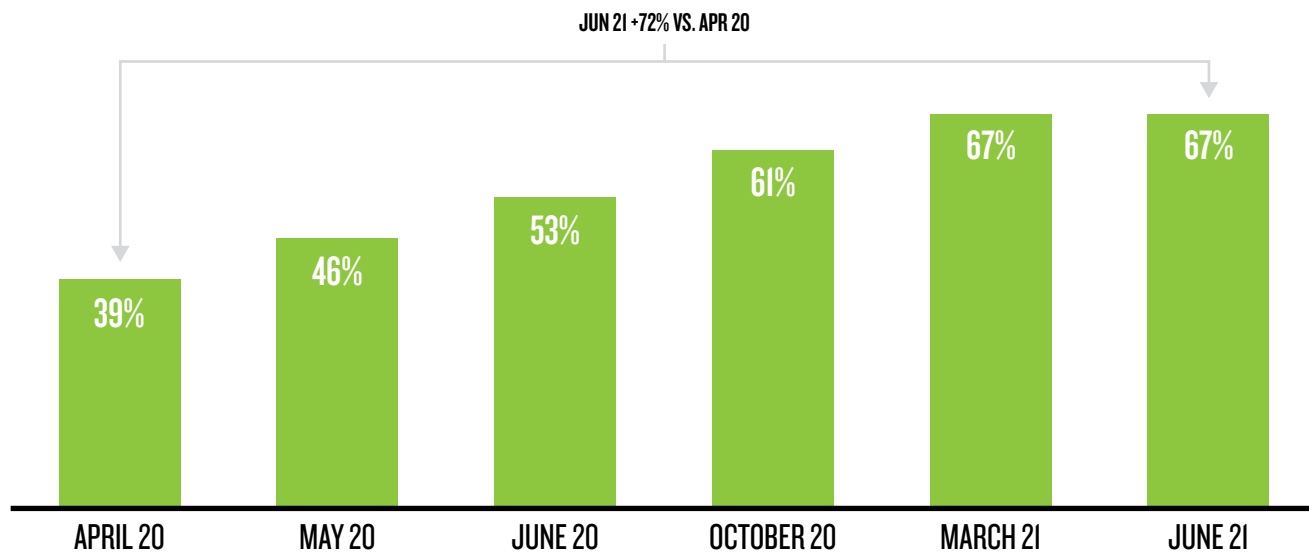
# WORKING OUTSIDE THE HOME UP NEARLY 70% SINCE APRIL 2020



These macro trends present advertisers a key opportunity to capitalize on America’s increasing consumer confidence, mobility and spending needs as we emerge from the pandemic. Radio specializes in reaching customers while they’re out and about in the marketplace and closest to the point of purchase, and Nielsen’s radio audience trends reveal how listening away-from-home is shifting back towards pre-pandemic levels across the top 100 markets in the U.S.

## AMONG EMPLOYED, TWO-THIRDS NOW WORK OUTSIDE THE HOME

*Employed Persons: continue to work outside the home; stopped going into the workplace when COVID-19 started but have recently started to go back in; furloughed or laid off but have since gone back to work\**

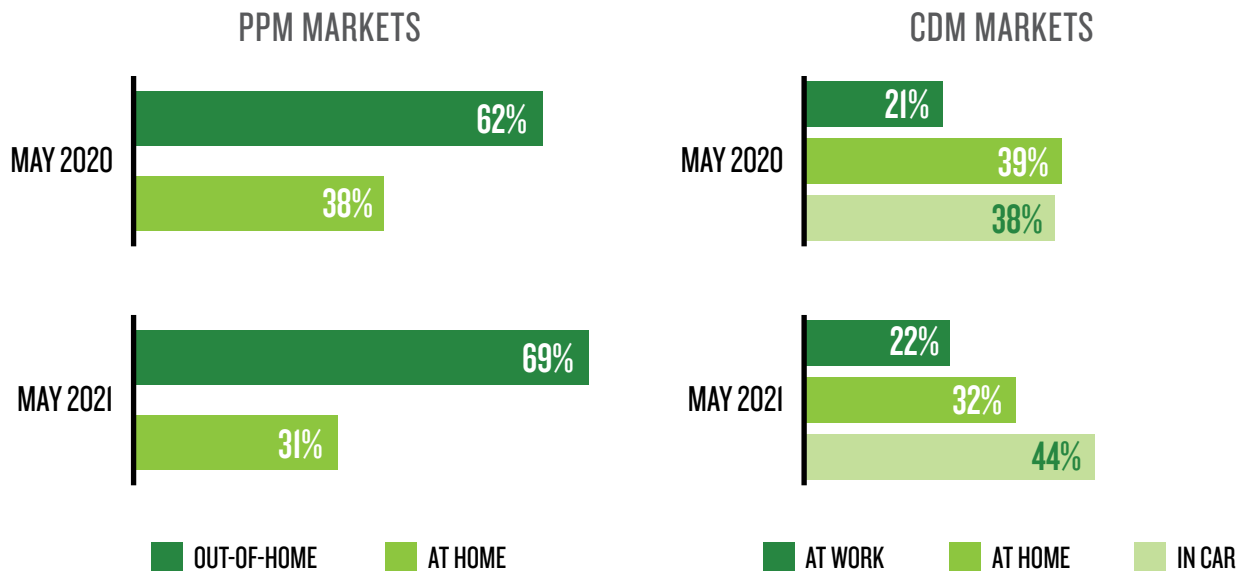


Source: Custom Nielsen study conducted April 2020, May 2020, June 2020, October 2020, March 2021 & June 2021 via an online survey among P18+

\*For those who said they were “furloughed or laid off and have since gone back to work” assumes the same ratio of those who work outside the home (52%) as the total employed population



# RADIO'S AVERAGE AUDIENCE COMPOSITION BY LISTENING LOCATION



Source: Nielsen PPM 45 Market Total and CDM 44 Market Total / May20-May21 / M-F 6a-7p / Persons 18+ / Average Quarter-Hour (AQH) Persons Composition by Location. Note: In CDM markets, percentages will not add to 100 because 'other' is not included.





# RADIO LISTENERS ARE READY TO GO & READY TO SPEND

In addition to being more mobile, the newest consumer sentiment survey also finds that the radio audience is primed to spend in multiple categories, including major purchases, everyday items, travel and dining.

## INTEND TO PURCHASE WITHIN A YEAR INDEX AGAINST TOTAL POPULATION

**RADIO LISTENERS ARE MORE LIKELY  
TO PURCHASE/LEASE A NEW/USED  
VEHICLE THAN THE TOTAL POPULATION**

ALL RADIO LISTENERS

HEAVY RADIO LISTENERS

**18%**  
MORE LIKELY



**32%**  
MORE LIKELY

**RADIO LISTENERS ARE MORE LIKELY  
TO BUY A NEW HOUSE THAN THE  
TOTAL POPULATION**

ALL RADIO LISTENERS

HEAVY RADIO LISTENERS

**10%**  
MORE LIKELY



**40%**  
MORE LIKELY

Source: Custom Nielsen study conducted June 2021 via an online survey, based on a weighted sample of 1009 among P18+

How to read: These figures are based on an index of the likelihood to purchase among radio listeners in general and heavy radio listeners compared to the total population. All radio listeners had a 118 index compared to the total population for purchasing a new or used vehicle, which translates to 18% higher likelihood.



# PLAN TO SPEND WITHIN A MONTH NOW THAT COVID RESTRICTIONS ARE EASING

INDEX AGAINST TOTAL POPULATION

	TRAVEL	SHOPPING	FOOD & DINING	AUTOMOTIVE	PROFESSIONAL SERVICES	HOME IMPROVEMENT
ALL RADIO LISTENERS	7% MORE LIKELY	8% MORE LIKELY	9% MORE LIKELY	12% MORE LIKELY	13% MORE LIKELY	14% MORE LIKELY
HEAVY RADIO LISTENERS	7% MORE LIKELY	20% MORE LIKELY	19% MORE LIKELY	20% MORE LIKELY	22% MORE LIKELY	10% MORE LIKELY

Source: Custom Nielsen study conducted June 2021 via an online survey, based on a weighted sample of 1009 among P18+

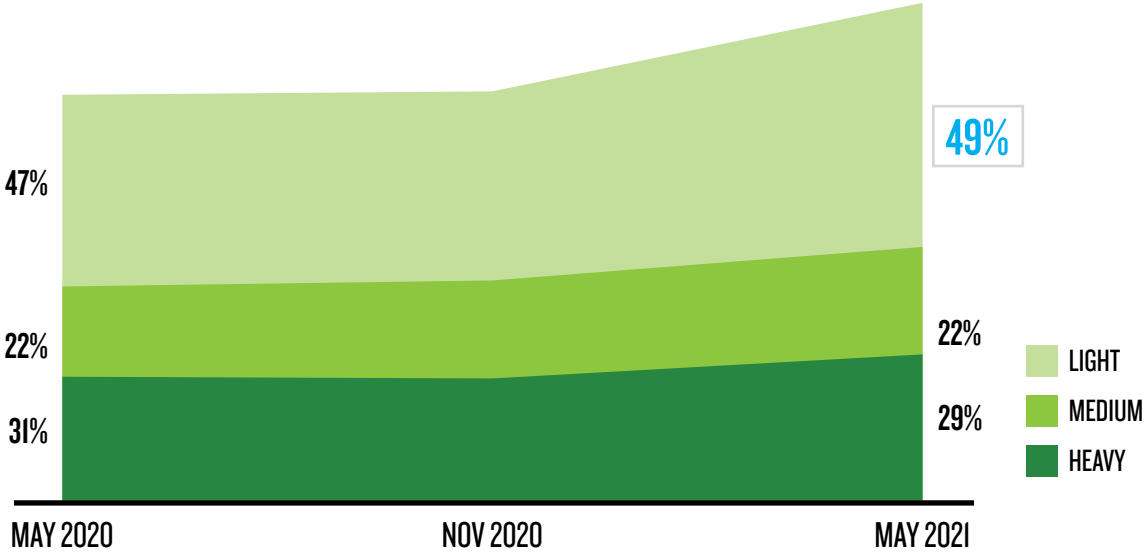
How to read: These figures are based on an index of the likelihood to purchase by category among radio listeners in general and heavy radio listeners compared to the total population. All radio listeners had a 107 index compared to the total population for spending on travel, which translates to 7% higher likelihood.



# PODCAST LISTENING

Podcast consumption is also on the rise, representing a new audio marketing opportunity which complements radio's legacy as both the leading overall reach platform among all media as well as the top way American consumers get their audio today. The past 18 months have proven the resiliency of podcasts, despite the major life changes brought about by COVID. According to Nielsen Scarborough's Podcasting Buying Power Service, the national podcast audience is growing again following a flat 2020.

## NEW PODCAST CONSUMERS ARE LIGHT LISTENERS



Source: Nielsen Scarborough Podcast Buying Power, Adults 18+, Light = 1-3x /mo, Medium = 4-9x /mo, Heavy = 10+ /mo



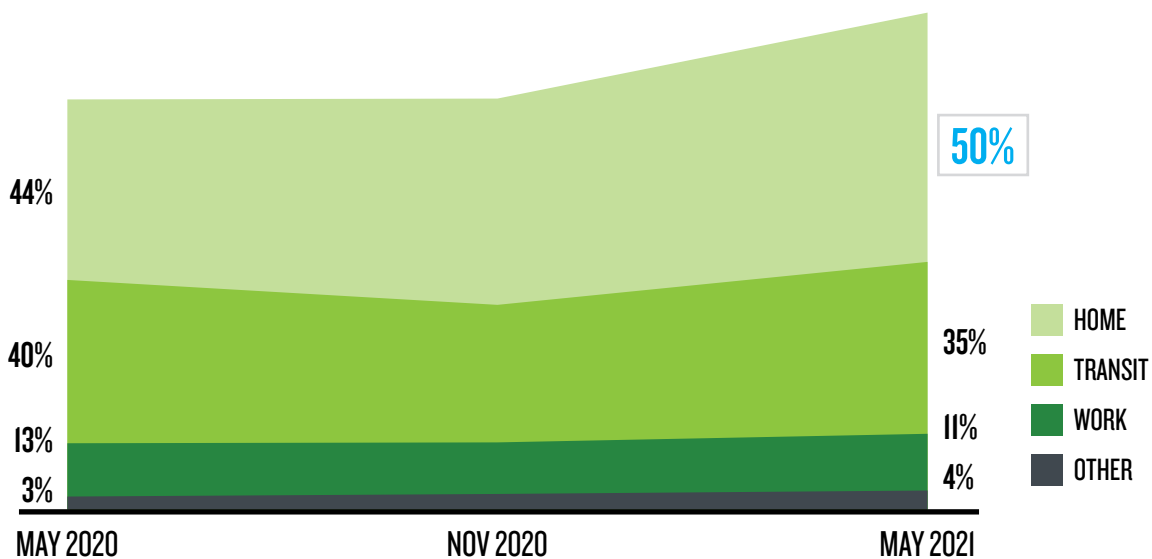
**PODCAST GROWTH RESUMING AFTER COVID**





What's more, the pandemic and our recovery from it has inspired millions of new listeners to begin sampling podcasts, particularly from home where the ever-growing number of smart speakers make it even easier to listen.

## NEW PODCAST CONSUMERS ARE AT-HOME LISTENERS



Source: Nielsen Scarborough Podcast Buying Power, Adults 18+, Where do you listen to podcasts most often?

Stay tuned for a new *Podcasting Today* report coming in Q3 2021 from Nielsen, which will dive deeper into the trends and marketing opportunities happening in the podcast industry.



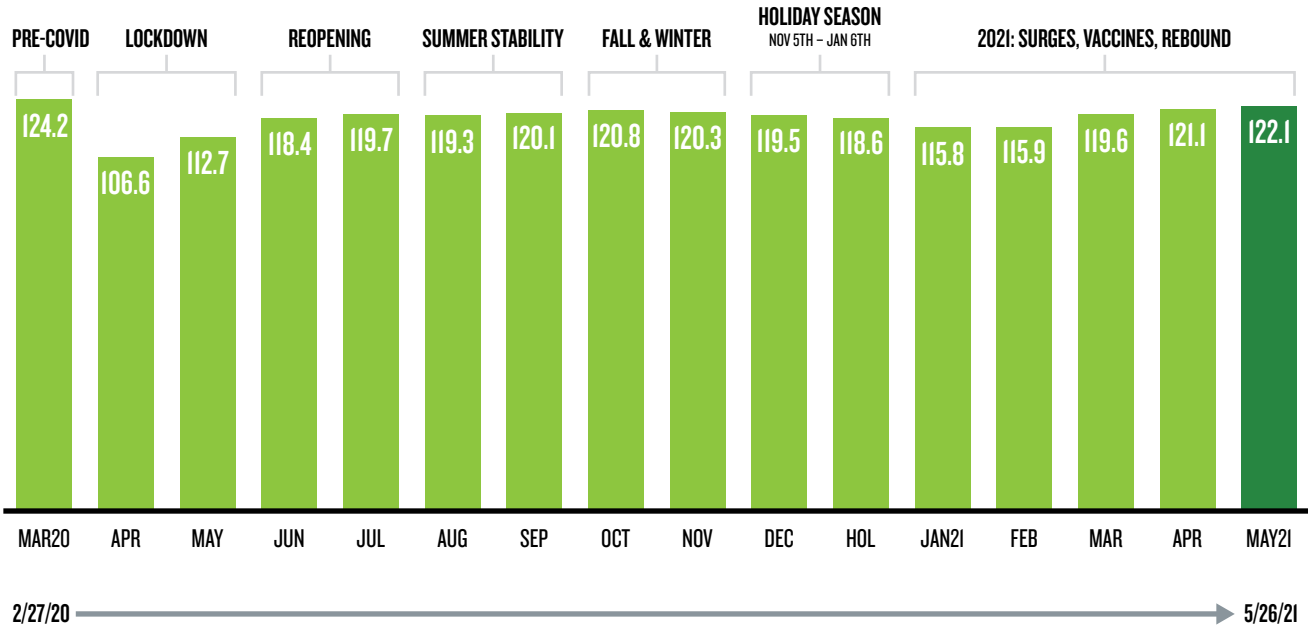
# AUDIO TODAY APPENDIX

The following pages detail the radio listening trends from Nielsen's PPM and CDM markets (top 100 radio markets) through the May 2021 survey, as well as monthly radio reach and top formats among major audience demographics.



# RADIO'S WEEKLY REACH TREND – PPM MARKETS

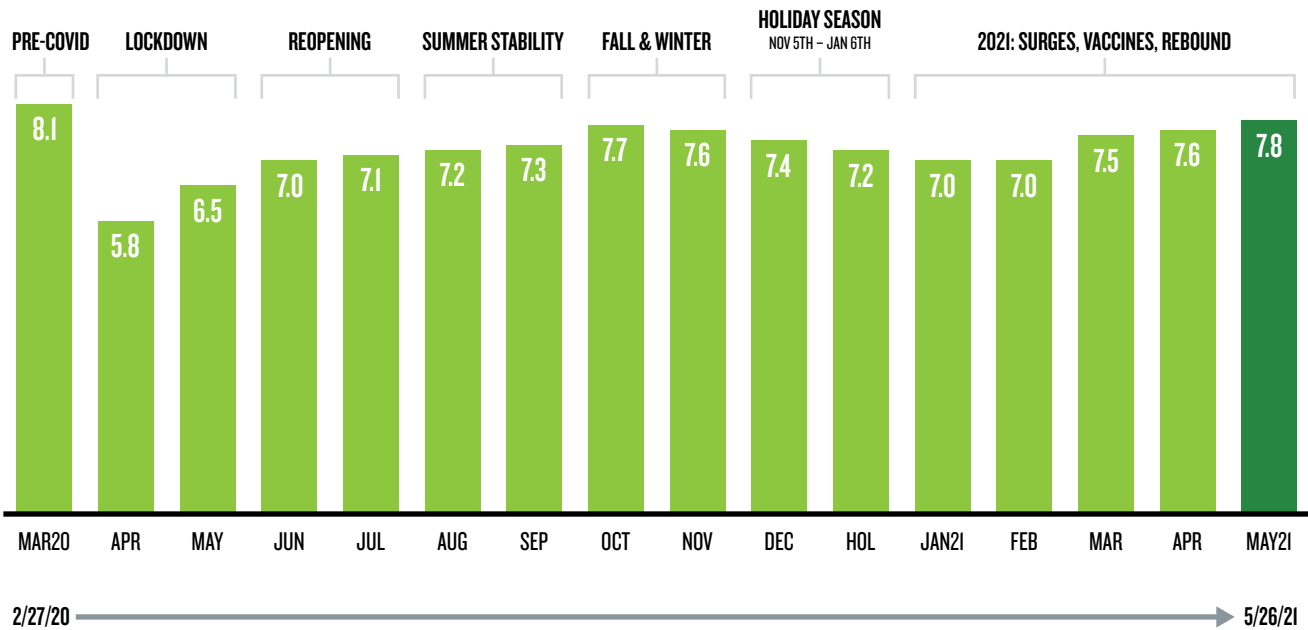
PPM AVERAGE WEEKLY CUME IN MILLIONS, BY SURVEY MONTH



Source: Nielsen Mar20-May21 PPM / Persons 12+ / M-Su 6a-12M / Weekly Cume Persons

# RADIO'S AQH TREND – PPM MARKETS

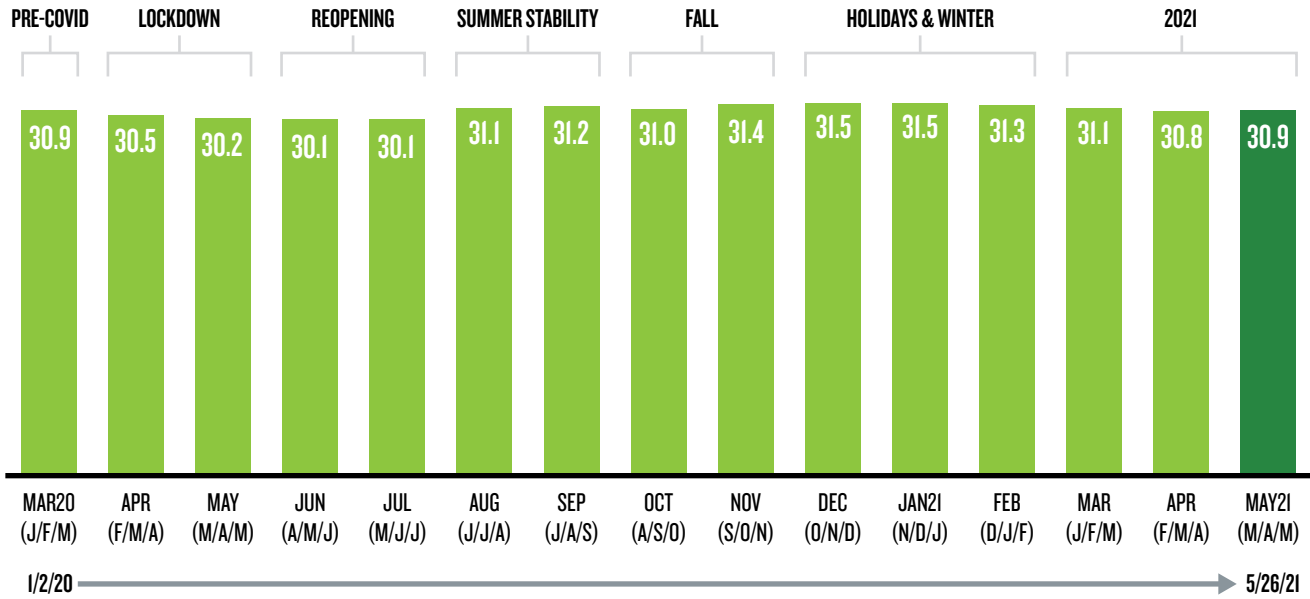
PPM AVERAGE QUARTER-HOUR PERSONS IN MILLIONS, BY SURVEY MONTH



Source: Nielsen Mar20-May21 PPM / Persons 12+ / M-Su 6a-12M / Weekly Cume Persons

# RADIO'S WEEKLY REACH TREND – CDM MARKETS

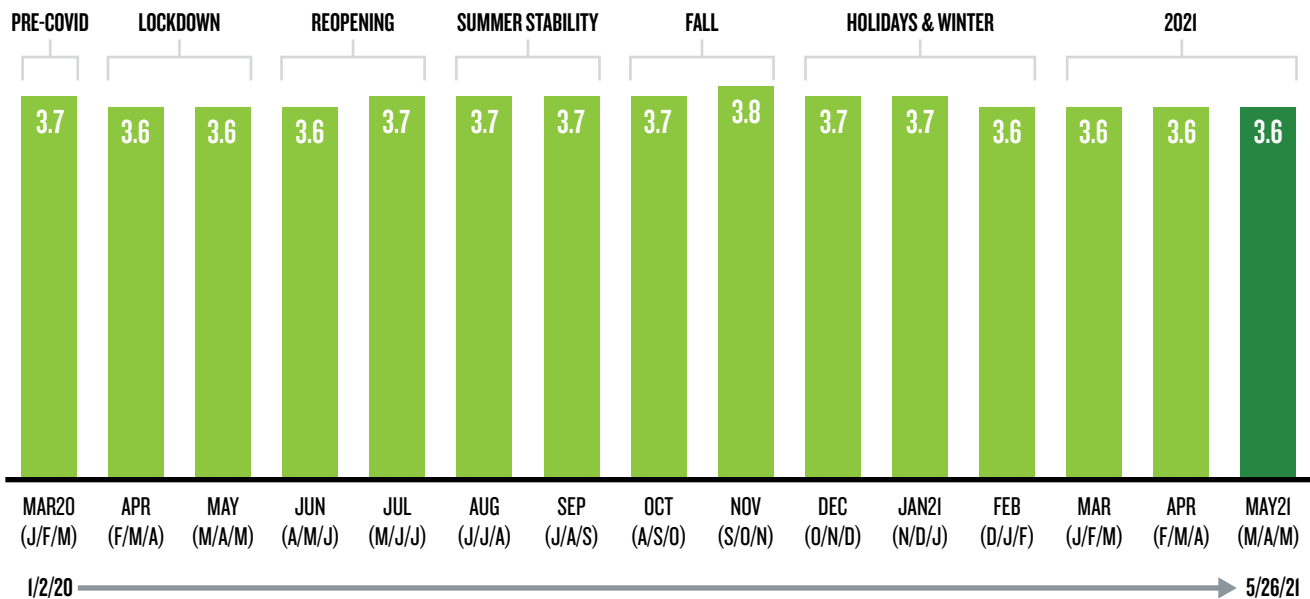
CONTINUOUS DIARY MEASUREMENT AVERAGE WEEKLY CUME IN MILLIONS, BY SURVEY



Source: Nielsen March20-May21 CDM / 44 Market Total / M-Su 6a-12M / Persons 12+ / Weekly Cume Persons

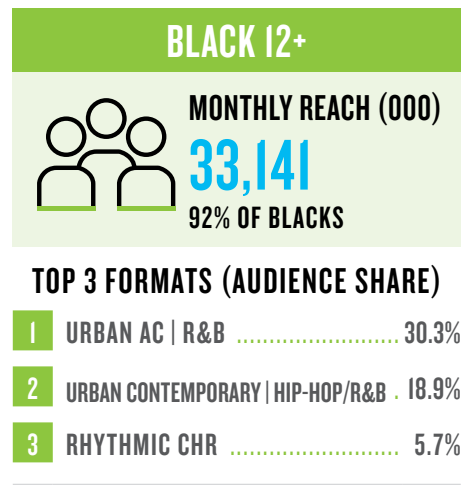
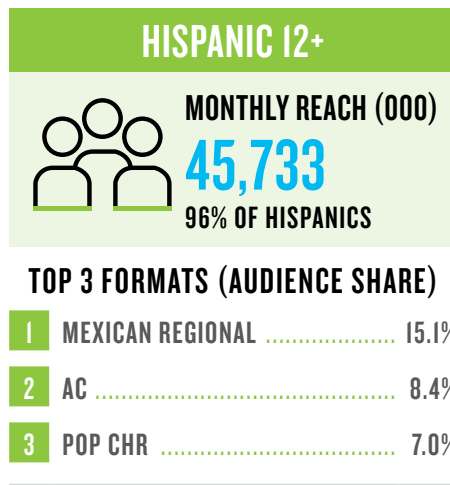
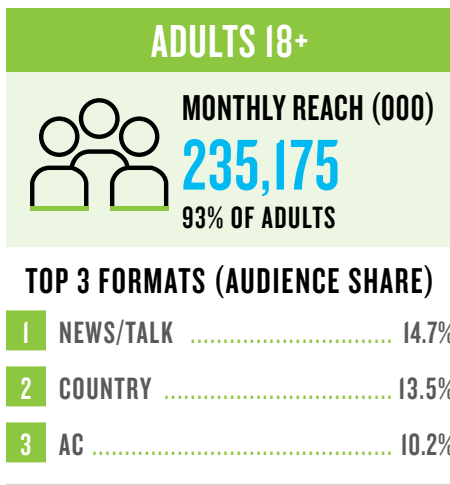
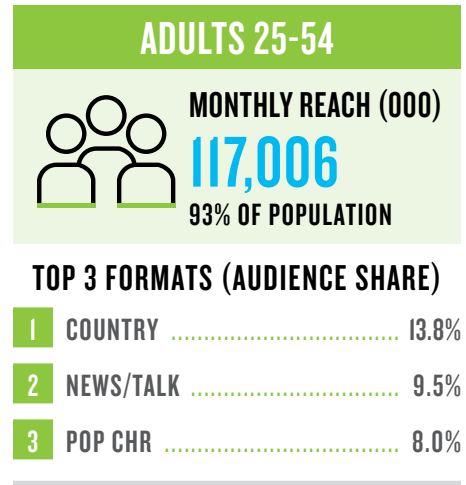
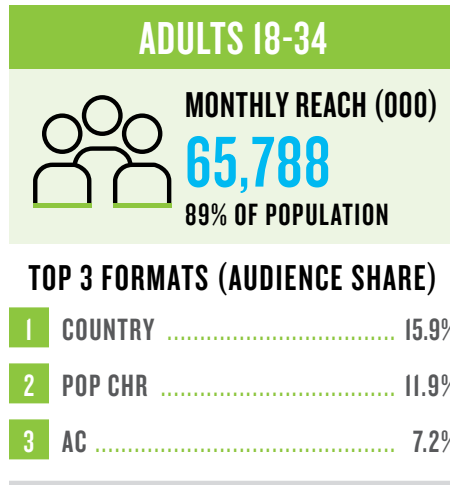
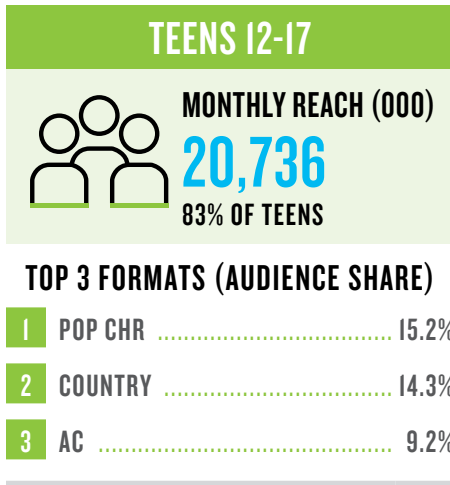
# RADIO'S AQH TREND – CDM MARKETS

CONTINUOUS DIARY MEASUREMENT AVERAGE QUARTER-HOUR (AQH) PERSONS IN MILLIONS, BY SURVEY



Source: Nielsen March20-May21 CDM / 44 Market Total / M-Su 6a-12M / Persons 12+ / AQH Persons (Persons Using Radio)

# MONTHLY REACH & TOP FORMATS



Source: Nielsen RADAR 148 Mar 2021 (Contiguous US) + Nielsen National Regional Database Fall 2020 (Alaska & Hawaii), 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 REACH & TOP FORMATS

**ADULTS 18-49**

**MONTHLY REACH (000)**  
**123,247**  
91% OF POPULATION

**TOP 3 FORMATS (AUDIENCE SHARE)**

1	COUNTRY	14.5%
2	POP CHR	9.6%
3	NEWS/TALK	7.8%

**WOMEN 18-49**

**MONTHLY REACH (000)**  
**61,818**  
91% OF POPULATION

**TOP 3 FORMATS (AUDIENCE SHARE)**

1	COUNTRY	15.4%
2	POP CHR	12.2%
3	AC	9.3%

**MEN 18-49**

**MONTHLY REACH (000)**  
**61,429**  
91% OF POPULATION

**TOP 3 FORMATS (AUDIENCE SHARE)**

1	COUNTRY	13.8%
2	NEWS/TALK	9.2%
3	CLASSIC ROCK	7.9%

**WOMEN 25-54**

**MONTHLY REACH (000)**  
**58,737**  
93% OF POPULATION

**TOP 3 FORMATS (AUDIENCE SHARE)**

1	COUNTRY	15.1%
2	POP CHR	10.2%
3	AC	9.8%

**MEN 25-54**

**MONTHLY REACH (000)**  
**58,270**  
94% OF POPULATION

**TOP 3 FORMATS (AUDIENCE SHARE)**

1	COUNTRY	12.7%
2	NEWS/TALK	11.4%
3	CLASSIC ROCK	8.8%

Source: Nielsen RADAR 148 Mar 2021 (Contiguous US) + Nielsen National Regional Database Fall 2020 (Alaska & Hawaii). 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



## ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a leading global data and analytics company that provides a holistic and objective understanding of the media industry. With offerings spanning audience measurement, audience outcomes and content, Nielsen offers its clients and partners simple solutions to complex questions and optimizes the value of their investments and growth strategies. It is the only company that can offer de-duplicated cross-media audience measurement. Audience is Everything™ to Nielsen and its clients, and Nielsen is committed to ensuring that every voice counts.

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