FALL 2021 RADIO TRENDS FROM PPM MARKETS

Presented by:
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About the RRC

The Radio Research Consortium, Inc. is an independent, not-for-profit research firm committed to providing audience data to non-commercial radio stations for 40 years now!

RRC is non-commercial radio’s representative for Nielsen Audio & Scarborough audience research.
Six employees v. 253 markets!
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Register today: www.RRConline.org
Housekeeping Notes:

• Goal is to give ‘national’ averages to serve as benchmarks for your station & market
• This webinar is being recorded
• Use the Q&A for your questions, and you will receive an e-mail response
• Slides and webinar recording will be posted within the next 24-hours to www.RRConline.org
Today’s Headlines:

• 90% of listening (AQH) is back
• This varies greatly by market
  • many markets are ‘knocking on the door’
• The listening “curve” is back
• Out of Home listening is not fully back, which is why AQH is not fully back
• Weekends are back better than weekdays
• College Grads and older demos are ‘back and better than ever’
• Top performing Non Comm radio stations have very loyal audiences
Weekly Cume & PUMM

45 NON-EMBEDDED PPM MARKETS
Cume Listeners Back To 96% Of Pre-Pandemic

PREPARED BY RRC FROM DATA © NIELSEN AUDIO
Three Markets Have Recovered All Cume Listeners

Total AVG Weekly Cume By Market, Fall 2021 vs. Winter 2020
AQH Listening (PUMM) Back To 90% Of Pre-Pandemic

45 PPM Metros - Total AQH Persons For Radio (PUMM)

- WI20: 9,051,700
- SP20: 6,727,900
- SU20: 7,556,800
- FA20: 7,602,400
- WI21: 7,259,100
- SP21: 8,036,400
- SU21: 7,884,600
- FA21: 8,106,900

PREPARED BY RRC FROM DATA © NIELSEN AUDIO
Five Markets Have Recovered All AQH Listening

PUMM By Market, Fall 2021 vs. Winter 2020

PREPARED BY RRC FROM DATA © NIELSEN AUDIO
Hourly Audience Flow

45 NON-EMBEDDED PPM MARKETS
Weekdays (M-F 5a-1a) Are Back To 88%

Weekday PUMM Is Back To 88% Of Pre-Pandemic Listening

PREPARED BY RRC FROM DATA © NIELSEN AUDIO
Radio’s ‘Tent Poles’ Have Returned, Year Over Year

Mo-Fr 5A-6A  Mo-Fr 6A-7A  Mo-Fr 7A-8A  Mo-Fr 8A-9A  Mo-Fr 9A-10A  Mo-Fr 10A-11A  Mo-Fr 11A-12P  Mo-Fr 12P-1P  Mo-Fr 1P-2P  Mo-Fr 2P-3P  Mo-Fr 3P-4P  Mo-Fr 4P-5P  Mo-Fr 5P-6P  Mo-Fr 6P-7P  Mo-Fr 7P-8P  Mo-Fr 8P-9P  Mo-Fr 9P-10P  Mo-Fr 10P-11P  Mo-Fr 11P-12A  Mo-Fr 12A-1A
The ‘Shape’ Of Radio Is Back

While Still Behind Pre-Pandemic Listening Levels, The 'Shape' Of Radio Is Back
More AQH Listening Equals More Prime Time Gross Impressions
Listening Location

45 NON-EMBEDDED PPM MARKETS
In-Home Listening Remains Flat While Out-Of-Home Listening Reflects The Pandemic
Not Back To 70% Out-Of-Home Listening, Yet

45 PPM Metros - AQH Listening By Location

WI20 SP20 SU20 FA20 WI21 SP21 SU21 FA21

70% 58% 65% 65% 64% 66% 67% 66%

30% 35% 35% 36% 34% 33% 34%

45 PPM Metros In Home PUMM  45 PPM Metros Out Of Home PUMM
Repeat After Me: IT KEEPS GETTIN’ BETTER!

Out-Of-Home Listening Continues Driving PUMM

- WI20: 6,301,600
- SP20: 3,891,400
- SU20: 4,940,400
- FA20: 4,933,100
- WI21: 4,655,400
- SP21: 5,278,200
- SU21: 5,287,200
- FA21: 5,365,600

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Standard Dayparts

45 NON-EMBEDDED PPM MARKETS
M-Su 6a-12a (ROS)

45 PPM Markets Mo-Su 6A-12A PUMM

- Winter 2020: 9,051,700
- Spring 2020: 6,727,900
- Summer 2020: 7,556,800
- Fall 2020: 7,602,500
- Winter 2021: 7,258,900
- Spring 2021: 8,034,500
- Summer 2021: 7,884,600
- Fall 2021: 8,106,900
Prime Time (M-F 6a-7p) Back To 89%

M-F 6a-7p Is Back To 89% Of Pre-Pandemic Levels

<table>
<thead>
<tr>
<th>Season</th>
<th>PUMM Mo-Su 6A-12A</th>
<th>PUMM Mo-Fr 6A-7P</th>
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<td>Winter 2020</td>
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<td>12,119,000</td>
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<td>8,106,900</td>
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<tr>
<td>Fall 2020</td>
<td>8,000,000</td>
<td>9,500,000</td>
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</tbody>
</table>

PREPARED BY RRC FROM DATA © NIELSEN AUDIO
AM Drive = 89%, Middays = 88% And PM Drive = 88%
Evenings & Weekends Have Fared Better

Evenings Had Been 93% In SP21 (87% Today) While Weekends Had Been 97% (94% Today)
Demographics

45 NON-EMBEDDED PPM MARKETS
You Know The Trend For Persons 6+ PUMM

90% For Persons 6+

45 PPM Market Total

<table>
<thead>
<tr>
<th></th>
<th>Winter 2020</th>
<th>Spring 2020</th>
<th>Summer 2020</th>
<th>Fall 2020</th>
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<td>8,106,900</td>
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</tbody>
</table>
Four Distinct Demos - PUMM

P6-24 = 90%, P25-44 = 83%, P45-64 = 89% And P65+ Up 2%
Females Have Recovered Better - PUMM

Females 25+ = 91% And Men 25+ = 88%
Working Persons VS. College Grads - PUMM

P25+ Working Full Time = 82% And P25+ College Grads = 96%
SCOTT observations:

- 45 PPM Markets: ‘Normal’ (9), ‘On The Brink’ (10), ‘Closing In’ (14), ‘Struggling’ (12)
  
  - Qualifier: what’s the closest a market has ever been in any given week

<table>
<thead>
<tr>
<th>Market</th>
<th>AQH</th>
<th>W CUME</th>
<th>AWTE</th>
<th>Rating</th>
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<td>Philadelphia</td>
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<td>Portland</td>
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<td>Normal</td>
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<tr>
<td>Raleigh-Durham</td>
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<td>:45</td>
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<tr>
<td>San Antonio</td>
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</table>

- A year ago, only one market was at the normal, pre-COVID-19 listening levels and only four markets would have been in the “On the Brink” category

- Beware: It can take eight to ten weeks for listening levels to return to ‘pre-Christmas’ levels
Format Trends

45 NON-EMBEDDED PPM MARKETS
Non Comm News Stations (14)

• **5+ Share**
  • KCFR – Denver
  • KCUR – Kansas City
  • KNOW – Minneapolis
  • KOPB – Portland
  • KPBS – San Diego
  • KQED – San Francisco
  • KUOW – Seattle
  • KUT – Austin
  • KXJZ – Sacramento
  • WAMU – Washington
  • WFYI – Indianapolis
  • WNPR – Hartford
  • WOSU – Columbus
  • WUNC - Raleigh

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Non Comm Contemporary Christian Stations (8)

- 3+ AQH Share
- KJNW - Kansas City
- KLJY - St. Louis
- KSBJ - Houston
- KSGN - Riverside
- KSOS - Las Vegas
- KTISfm - Minneapolis
- WCIE/WJIS - Tampa
- WGTS - Washington
Non Comm Classical Stations (8)

- 2+ AQH Share
- KBYU - Salt Lake City
- KDFC - San Francisco
- KING - Seattle
- KQAC - Portland
- KVOD - Denver
- WDAV - Charlotte
- WETA - Washington
- WQXR - New York
Non Comm Triple-A Stations (4)

- 2+ AQH Share
- KCMR - Minneapolis
- KEXP - Seattle
- KUTX - Austin
- WXPN - Philadelphia
Non Comm Jazz Stations (6)

- 1+ AQH Share
- KMHD - Portland
- KUNV - Las Vegas
- KUVO - Denver
- WCLK - Atlanta
- WHOV - Norfolk
- WUCF - Orlando
Top-14 Non Comm News Stations (Share = 5+)

Sum of AQH Persons By Month for Top-14 Non-Commercial News Stations In PPM Markets

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Top-8 Non Comm Cont. Christian Stations (Share 3+)

Sum of AQH By Month for Top-8 Non-Comm Contemporary Christian Stations In PPM Markets

PREPARED BY RRC FROM DATA © NIELSEN AUDIO
Top-8 Non Comm Classical Stations (Share 2+)

Sum of AQH Persons for Top-8 Non Comm Classical Stations Across PPM Markets

PREPARED BY RRC FROM DATA © NIELSEN AUDIO
Top-4 Triple-A Non Comm Stations (Share 2+)

Sum of AQH Persons For Top-4 Triple-A Stations Across PPM Markets
Top-6 Non Comm Jazz Stations (Share 1+)

Sum of AQH Persons For Top-6 Jazz Stations Across PPM Markets

<table>
<thead>
<tr>
<th></th>
<th>HOL20</th>
<th>JAN21</th>
<th>FEB21</th>
<th>MAR21</th>
<th>APR21</th>
<th>MAY21</th>
<th>JUN21</th>
<th>JUL21</th>
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<td>13,200</td>
<td>12,600</td>
<td>11,300</td>
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</table>
Gender Profiles

45 NON-EMBEDDED PPM MARKETS
Top-8 Non Comm Cont. Christian Stations (Share 3+)

AQH Gender Comp% For Top-8 Non-Comm Contemporary Christian Stations In PPM Markets

Male: 40%
Female: 60%

Average
Top-8 Non Comm Classical Stations (Share 2+)

AQH Gender Comp% For Top-8 Non Comm Classical Stations Across PPM Markets

Male: 49%
Female: 52%

Average

PREPARED BY RRC FROM DATA © NIELSEN AUDIO
Top-14 Non Comm News Stations (Share 5+)

AQH Gender Comp% for Top-14 Non-Comm News Stations In PPM Markets

- Male: 51%
- Female: 49%

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Top-4 Triple-A Non Comm Stations (Share 2+)

AQH Gender Comp% For Top-4 Triple-A Stations Across PPM Markets

Average

Male: 52%
Female: 48%
Top-6 Non Comm Jazz Stations (Share 1+)

AQH Gender Comp% For Top-6 Jazz Stations Across PPM Markets

- Male: 60%
- Female: 41%
Age Profiles

45 NON-EMBEDDED PPM MARKETS
Top-8 Non Comm Classical Stations (Share 2+)

AQH Age Comp% For Top-8 Non Comm Classical Stations Across PPM Markets
Top-6 Non Comm Jazz Stations (Share 1+)

AQH Age Comp% For Top-6 Jazz Stations Across PPM Markets

- 6-11: 4%
- 12-17: 3%
- 18-24: 5%
- 25-34: 8%
- 35-44: 10%
- 45-54: 12%
- 55-64: 26%
- 65-74: 22%
- 75+: 13%
Top-14 Non Comm News Stations (Share 5+)

AQH Age Comp% for Top-14 Non-Comm News Stations In PPM Markets
Top-4 Triple-A Stations (Share 2+)

AQH Age Comp% For Top-4 Triple-A Stations Across PPM Markets

- 6-11: 2%
- 12-17: 1%
- 18-24: 3%
- 25-34: 18%
- 35-44: 17%
- 45-54: 17%
- 55-64: 15%
- 65-74: 26%
- 75+: 1%
Top-8 Non Comm Cont. Christian Stations (Share 3+)

AQH Age Comp% For Top-8 Non-Comm Contemporary Christian Stations In PPM Markets

Average

6-11: 10%
12-17: 8%
18-24: 6%
25-34: 9%
35-44: 13%
45-54: 18%
55-64: 25%
65-74: 10%
75+: 3%

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Daypart Profiles

45 NON-EMBEDDED PPM MARKETS
Top-14 Non Comm News Stations (Share 5+)

AQH Share By Daypart For Top-14 Non-Comm News Stations In PPM Markets

- M-F 6a-10a: 9.9
- M-F 10a-3p: 6.2
- M-F 3p-7p: 7.1
- M-F 7p-12m: 5.7
- Sa-Su 6a-12m: 6.7

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Top-4 Triple-A Stations (Share 2+)

AQH Share By Daypart For Top-4 Triple-A Stations Across PPM Markets

- M-F 6a-10a: 3.1
- M-F 10a-3p: 3.8
- M-F 3p-7p: 4.0
- M-F 7p-12m: 2.6
- Sa-Su 6a-12m: 3.8

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Top-6 Non Comm Jazz Stations (Share 1+)

AQH Share By Daypart For Top-6 Jazz Stations Across PPM Markets

- M-F 6a-10a: 1.4
- M-F 10a-3p: 1.5
- M-F 3p-7p: 1.7
- M-F 7p-12m: 2.1
- Sa-Su 6a-12m: 2.0
Top-8 Non Comm Classical Stations (Share 2+)

AQH Share By Daypart For Top-8 Non Comm Classical Stations Across PPM Markets

- M-F 6a-10a: 2.8
- M-F 10a-3p: 2.9
- M-F 3p-7p: 2.6
- M-F 7p-12m: 4.5
- Sa-Su 6a-12m: 3.5

Average

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Top-8 Non Comm Cont. Christian Stations (Share 3+)

AQH Share By Daypart For Top-8 Non-Comm Contemporary Christian Stations In PPM Markets

- M-F 6a-10a: 4.7
- M-F 10a-3p: 4.6
- M-F 3p-7p: 5.1
- M-F 7p-12m: 5.6
- Sa-Su 6a-12m: 6.1

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P1 Profiles

45 NON-EMBEDDED PPM MARKETS
Top-14 Non Comm News Stations (Share 5+)

P1 Profile For Top-14 Non-Comm News Stations In PPM Markets

- % P1 Avg Weekly Cume: 62%
- % P1 Avg Daily Cume: 76%
- % P1 AQH: 85%

PREPARED BY RRC FROM DATA © NIELSEN AUDIO
Top-8 Non Comm Cont. Christian Stations (Share 3+)

P1 Profile For Top-8 Non-Comm Contemporary Christian Stations In PPM Markets

- % P1 Avg Weekly Cume: 50%
- % P1 Avg Daily Cume: 67%
- % P1 AQH: 80%
Top-4 Triple-A Stations (Share 2+)

P1 Profile For Top-4 Triple-A Stations Across PPM Markets

- % P1 Avg Weekly Cume: 39%
- % P1 Avg Daily Cume: 58%
- % P1 AQH: 80%

PREPARED BY RRC FROM DATA © NIELSEN AUDIO
Top-8 Non Comm Classical Stations (Share 2+)

P1 Profile For Top-8 Non Comm Classical Stations Across PPM Markets

- % P1 Avg Weekly Cume: 43%
- % P1 Avg Daily Cume: 60%
- % P1 AQH: 77%

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Top-6 Non Comm Jazz Stations (Share 1+)

P1 Profile For Top-6 Jazz Stations Across PPM Markets

- % P1 Avg Weekly Cume: 35%
- % P1 Avg Daily Cume: 50%
- % P1 AQH: 66%

PREPARED BY RRC FROM DATA © NIELSEN AUDIO
Top-4 Triple-A Stations (Share 2+)

AVG Weekly Occasions For Top-4 Triple-A Stations Across PPM Markets

- Avg Weekly Occasions: 14.1
- P1 Avg Weekly Occasions: 27
Top-8 Non Comm Cont. Christian Stations (Share 3+)

AVG Weekly Occasions For Top-8 Non-Comm Contemporary Christian Stations In PPM Markets

- Avg Weekly Occasions: 14.6
- P1 Weekly Occasions: 23
Top-8 Non Comm Classical Stations (Share 2+)

AVG Weekly Occasions For Top-8 Non Comm Classical Stations Across PPM Markets

Avg Weekly Occasions: 13.6
P1 Avg Weekly Occasions: 23
Top-14 Non Comm News Stations (Share 5+)

AVG Weekly Occasions For Top-14 Non-Comm News Stations In PPM Markets

- Avg Weekly Occasions: 13.6
- P1 Avg Weekly Occasions: 18
Top-6 Non Comm Jazz Stations (Share 1+)

AVG Weekly Occasions For Top-6 Jazz Stations Across PPM Markets

Avg Weekly Occasions: 10.6

P1 Avg Weekly Occasions: 19
To Repeat:

• 90% of listening (AQH) is back

• This varies, market by market
  • many markets are ‘knocking on the door’

• The listening “curve” is back

• Out of Home listening is not fully back, which is why AQH is not fully back.

• Weekends are back better than weekdays

• College Grads and older demos are ‘back and better than ever’

• Non Comm radio stations in general have very loyal audiences
QUESTIONS?

RADIO RESEARCH CONSORTIUM

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THANKS!

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