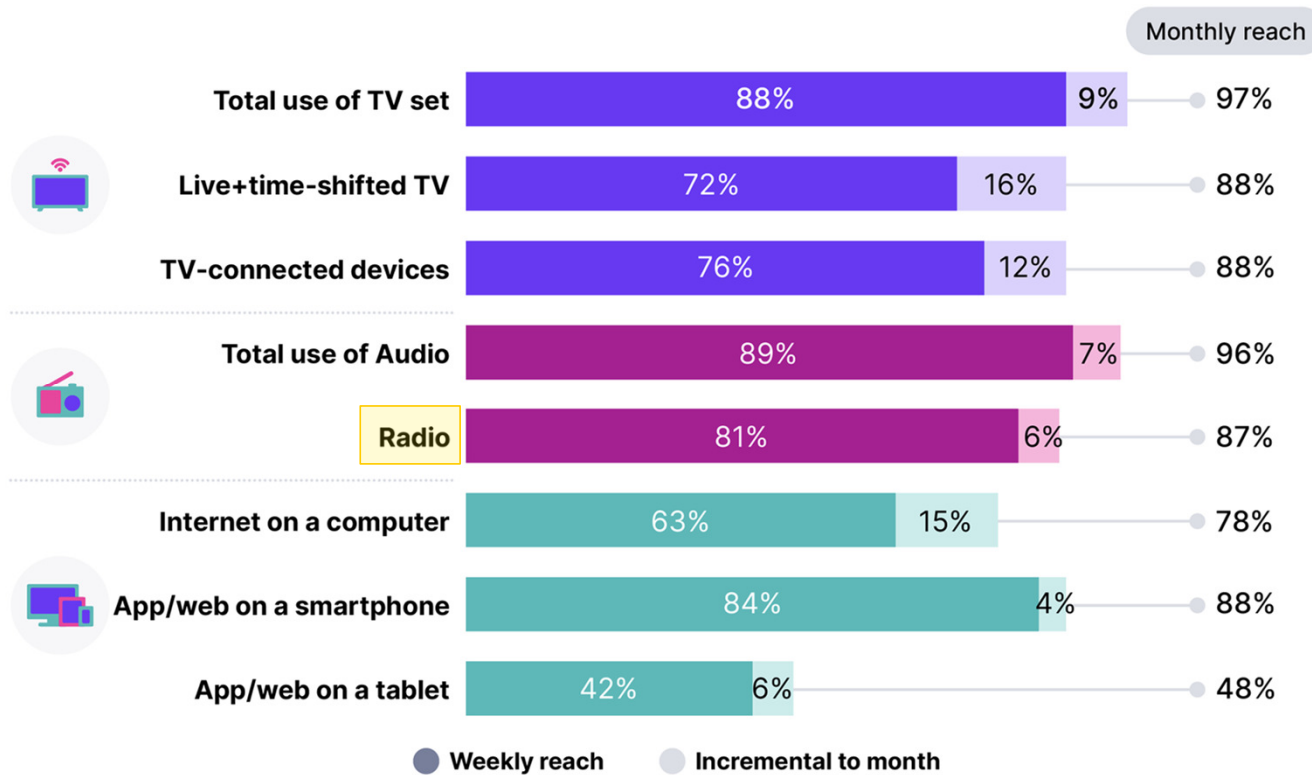# Audio's New Prominence in Media Planning

Rich Tunkel
Managing Director, Nielsen Audio

Use of Audio and TV among U.S. adults leads all platforms
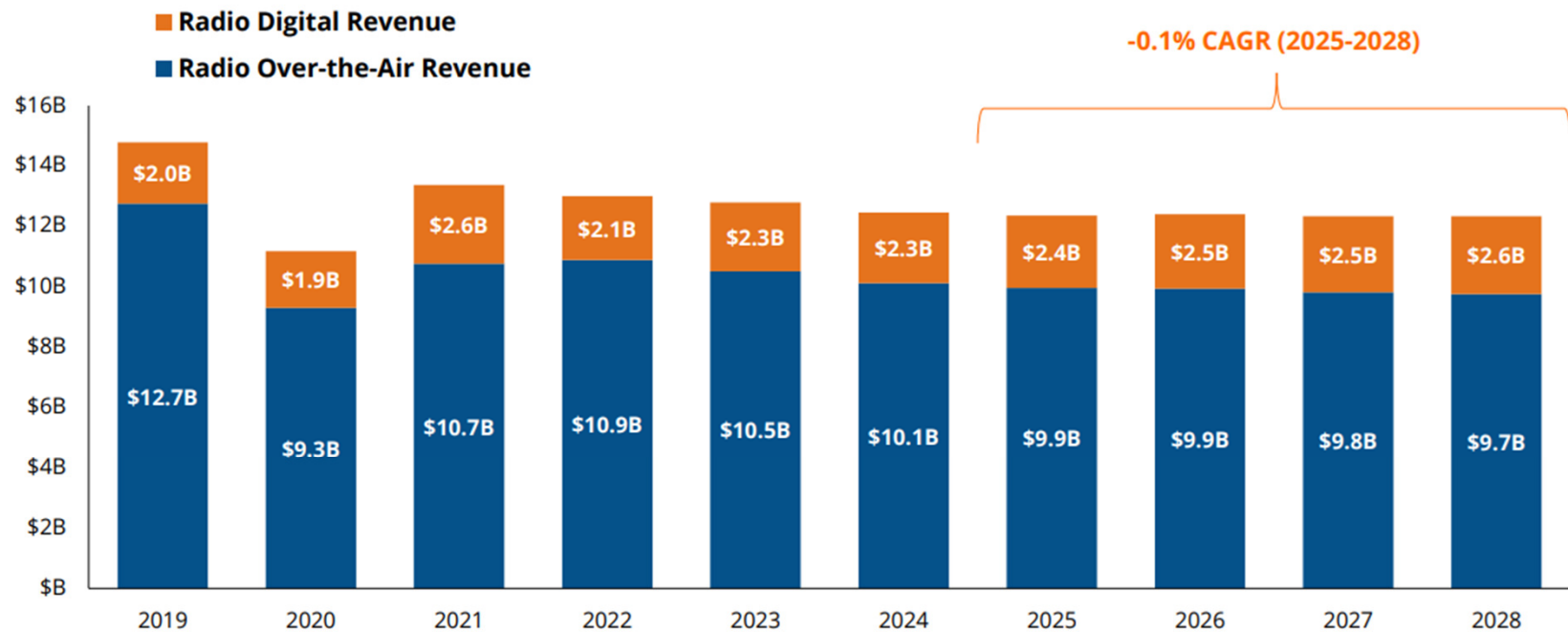
Reach % across platforms

Q2 2024, persons 18+ based on U.S. population

Monthly reach

Platform	Weekly reach	Incremental to month	Monthly reach
Total use of TV set	88%	9%	97%
Live+time-shifted TV	72%	16%	88%
TV-connected devices	76%	12%	88%
Total use of Audio	89%	7%	96%
Radio	81%	6%	87%
Internet on a computer	63%	15%	78%
App/web on a smartphone	84%	4%	88%
App/web on a tablet	42%	6%	48%

● Weekly reach   ● Incremental to month

Nielsen

Radio's Problem:

Historic and Go Forward Forecast: Local Radio w/o Political

Legend: Radio Digital Revenue (orange), Radio Over-the-Air Revenue (blue)

-0.1% CAGR (2025-2028)

Year	Over-the-Air	Digital
2019	$12.7B	$2.0B
2020	$9.3B	$1.9B
2021	$10.7B	$2.6B
2022	$10.9B	$2.1B
2023	$10.5B	$2.3B
2024	$10.1B	$2.3B
2025	$9.9B	$2.4B
2026	$9.9B	$2.5B
2027	$9.8B	$2.5B
2028	$9.7B	$2.6B

Note: Digital radio advertising includes local advertising sold by local stations (streaming, email advertising, O&O banners, SEM (not SEO), website advertisements) and pure-play streaming services except CTV/OTT. Includes the share retained by local radio stations after reselling other online platforms (e.g., Google AdWords).

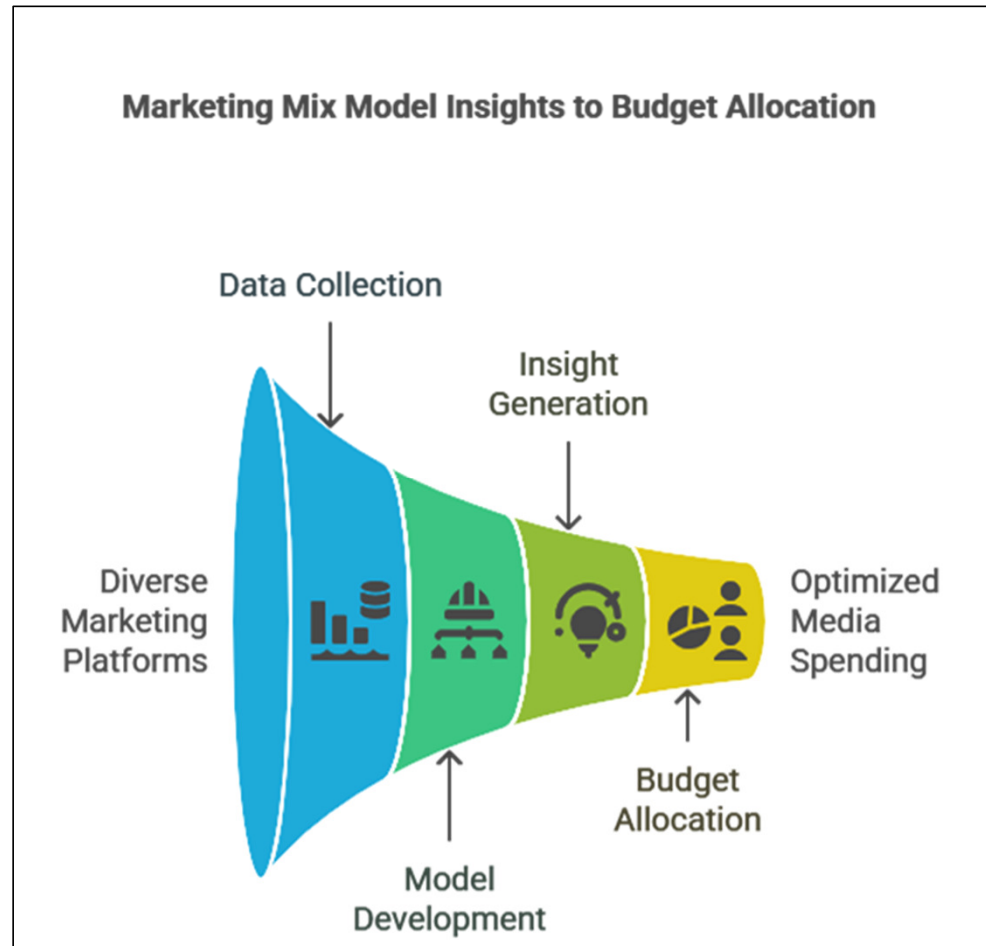Source: BIA U.S. Local Advertising Forecast 2025, Issued March 2025

Perceived effectiveness does not match reality

2025 ANNUAL MARKETING REPORT

Perceived channel effectiveness

Social $2.2
$1.6
Search $1.2
Video
Display $1.5
$1.3 CTV
OOH $1.2
TV $1.5
Podcasts
Print $1.5
$1.5
Radio $2.0

70%
60%
50%
40%

40% 45% 50% 55% 60% 65%

Plan to increase budget in 2025

Digital
Traditional

Bubble Size:
Weighted
Average ROI

ROI Source: 2024 Nielsen Global Compass Benchmarks

Source: 2025 Nielsen Global Annual Marketing Survey, Nielsen Global Compass Benchmarks

Nielsen

Where media decisions are made:

Marketing Mix Model Insights to Budget Allocation

Data Collection

Insight Generation

Diverse Marketing Platforms

Optimized Media Spending

Model Development

Budget Allocation

Nielsen

Perspective: Unlocking the potential of radio in marketing mix models

Insights > Media

Unlocking the potential of radio in marketing mix models

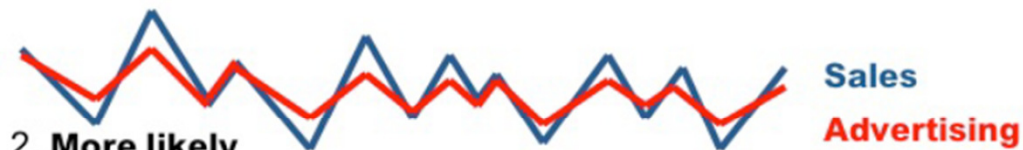we can confirm that when sufficient impressions are run, audio is measurable, and shows up quite well in MMM

Dave Hohman, EVP & GM, Global Marketing Mix, Nielsen

How Mix Models work

1. **Perfect match!**
Advertising gets all the credit for sales
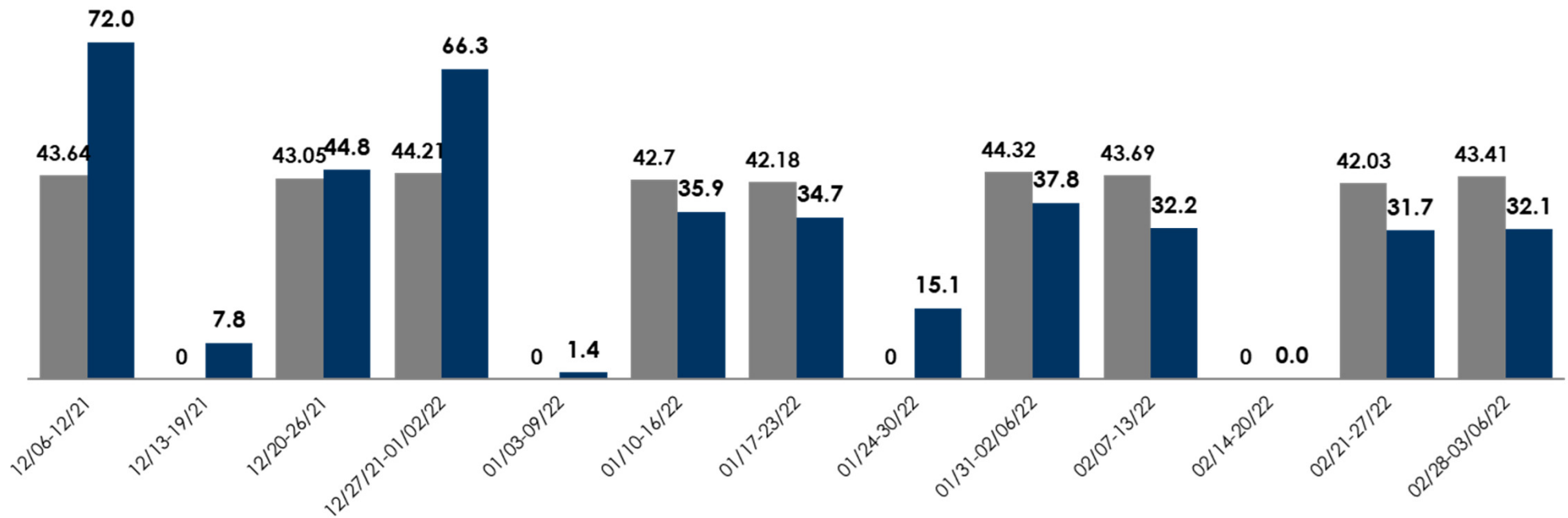
2. **More likely**
Advertising gets major credit for sales
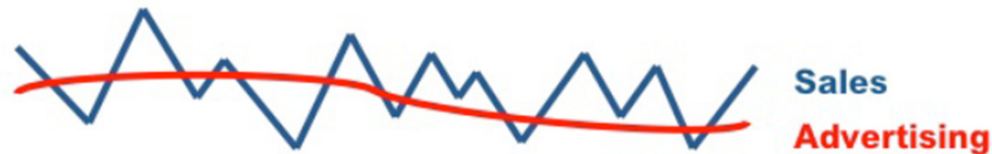
3. **Radio's story** – little credit for sales
Poor match with sales due to smoothing of radio GRP delivery

As-run weekly GRP deliveries have more variation than planned media weight

Personal care brand media weight: Adults 25-54
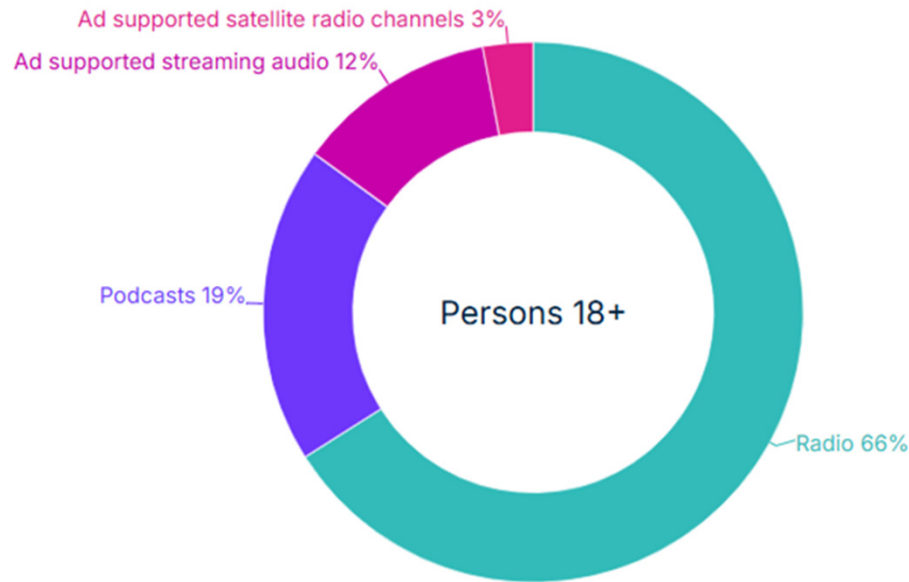
■ Planned weight ■ As-run Media Monitors

CUMULUS | Westwood One
AUDIO ACTIVE
G R O U P

1 Year anniversary of 'The Record'

Powered by Nielsen and Edison Research, the audio answer to the gauge + ad-supported view

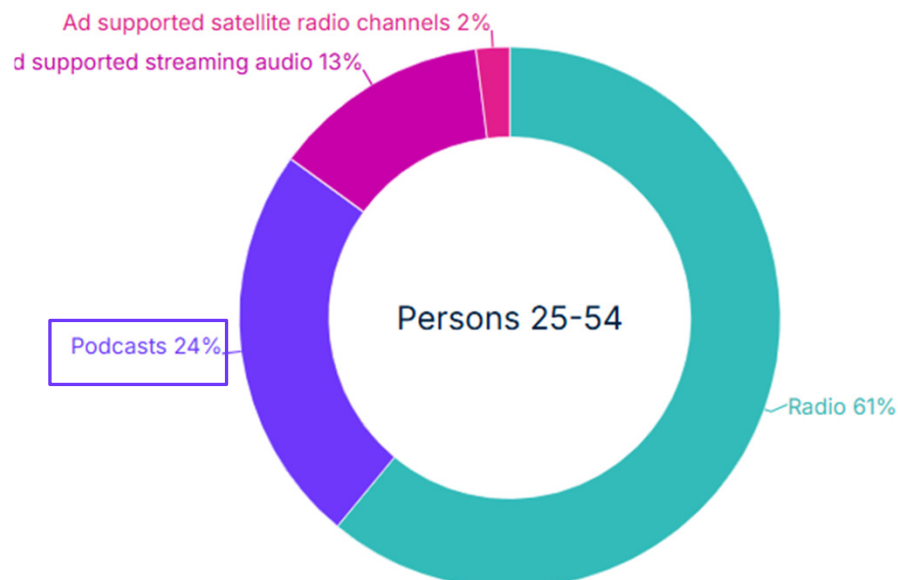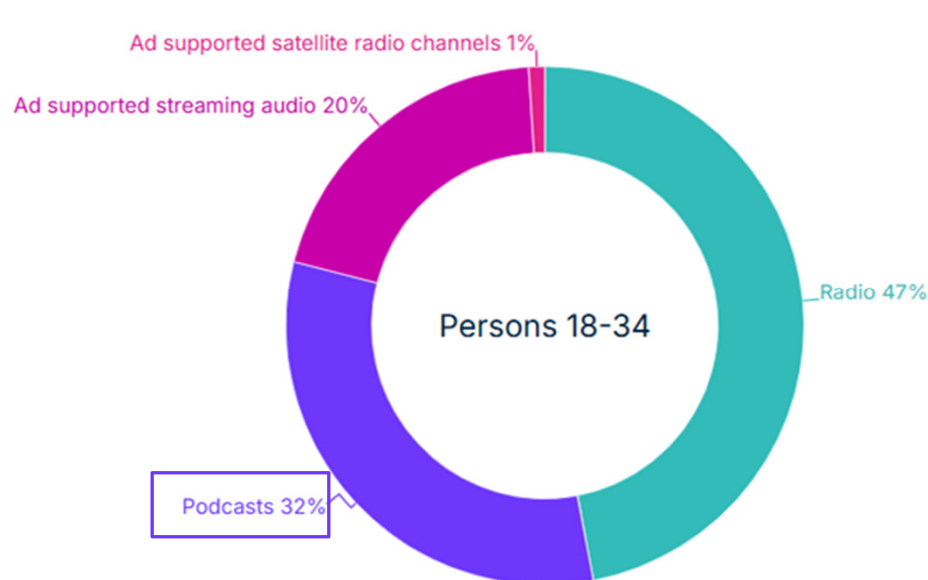**Share of daily time spent with ad supported audio among U.S. audiences**

Ad supported satellite radio channels 3%
Ad supported streaming audio 12%
Podcasts 19%
Persons 18+
Radio 66%

Source: Edison Research, "Share of Ear®" Q1 2025

Forbes

Americans Listen To Far More Radio Than Podcasts—Even Young People, New Data Shows

Mary Whitfill Roeloffs Forbes Staff
Mary Roeloffs is a Forbes breaking news reporter covering pop culture.

Follow

☐ 0   Apr 30, 2024, 11:08am EDT

Nielsen

There is consistent demand for podcasts in the American media diet

Share of daily time spent with ad-supported audio among U.S. audiences

Persons 18-34
- Radio 47%
- Podcasts 32%
- Ad supported streaming audio 20%
- Ad supported satellite radio channels 1%

Persons 25-54
- Radio 61%
- Podcasts 24%
- Ad supported streaming audio 13%
- Ad supported satellite radio channels 2%

Source: Edison Research, "Share of Ear®" Q1 2025

Nielsen

PPM 3-Minute Qualifier Debut - Q1 2025

Service-level data based on Q1 2025, 45 non-embedded PPM markets (Houston metro) M-S 6a-12m.

Benefits of the 3-Minute Qualifier

Improves measurability of radio advertising and recaptures lost impressions

Captures More Listening

Measurable ad impressions will increase, benefitting both broadcasters and advertisers

Addresses Ad Breaks at the Quarter Hour

Recaptures listening currently lost around the quarter hour break

Consistent with current listening behavior

Today's median uncredited listening length is 3 minutes long

Nielsen

Key Findings From First Quarter of 3MQ

➜ Q1 audience levels - the **highest since 2022**

➜ Q1 2025 audience levels are approx **15% higher than Q4 2024**

➜ Daily cume increases at the station level; driving AQH changes

➜ Time spent listening - more minutes are being captured

➜ Range by Market: 28% to 2%

➜ All dayparts; evenly distributed

➜ Results will vary by station & market

◀▶ Nielsen

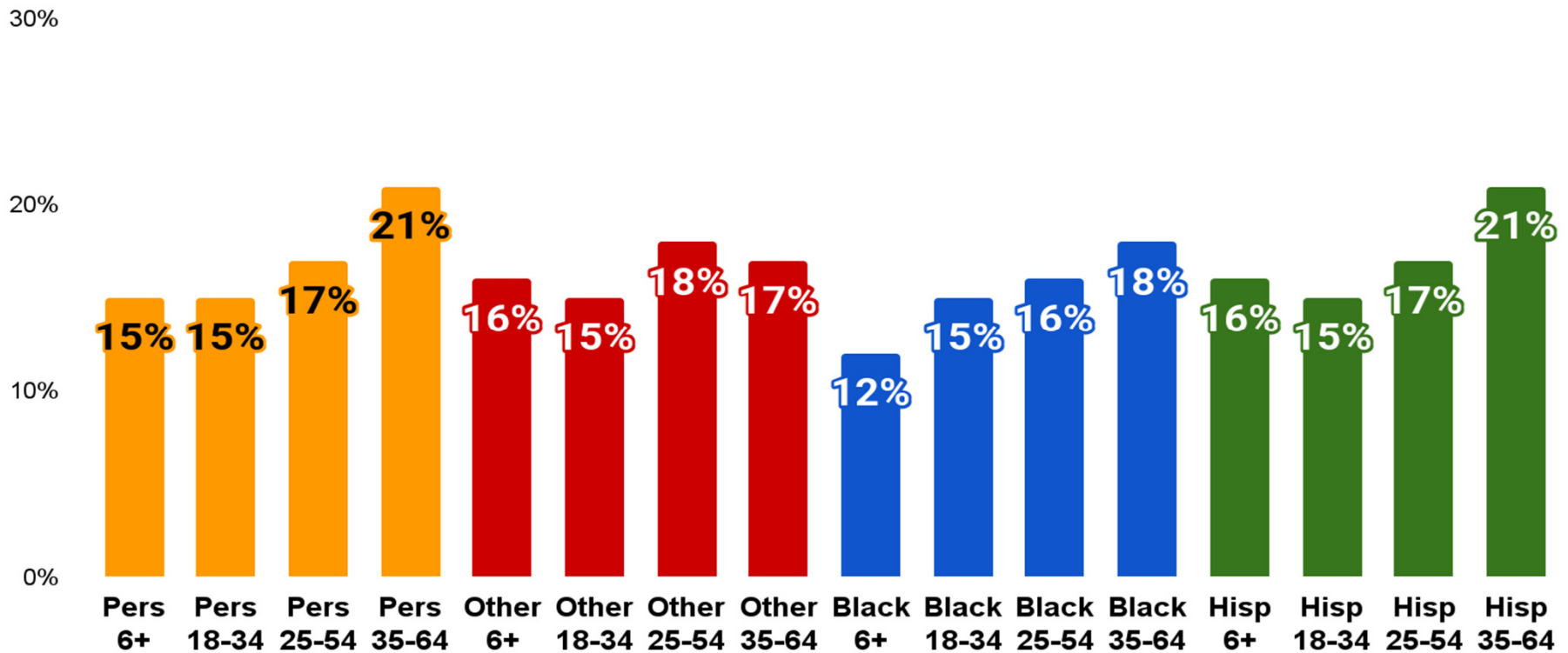# Trending PPM Average Audience Levels

Persons 6+ AQH (PUMM) - Full Week
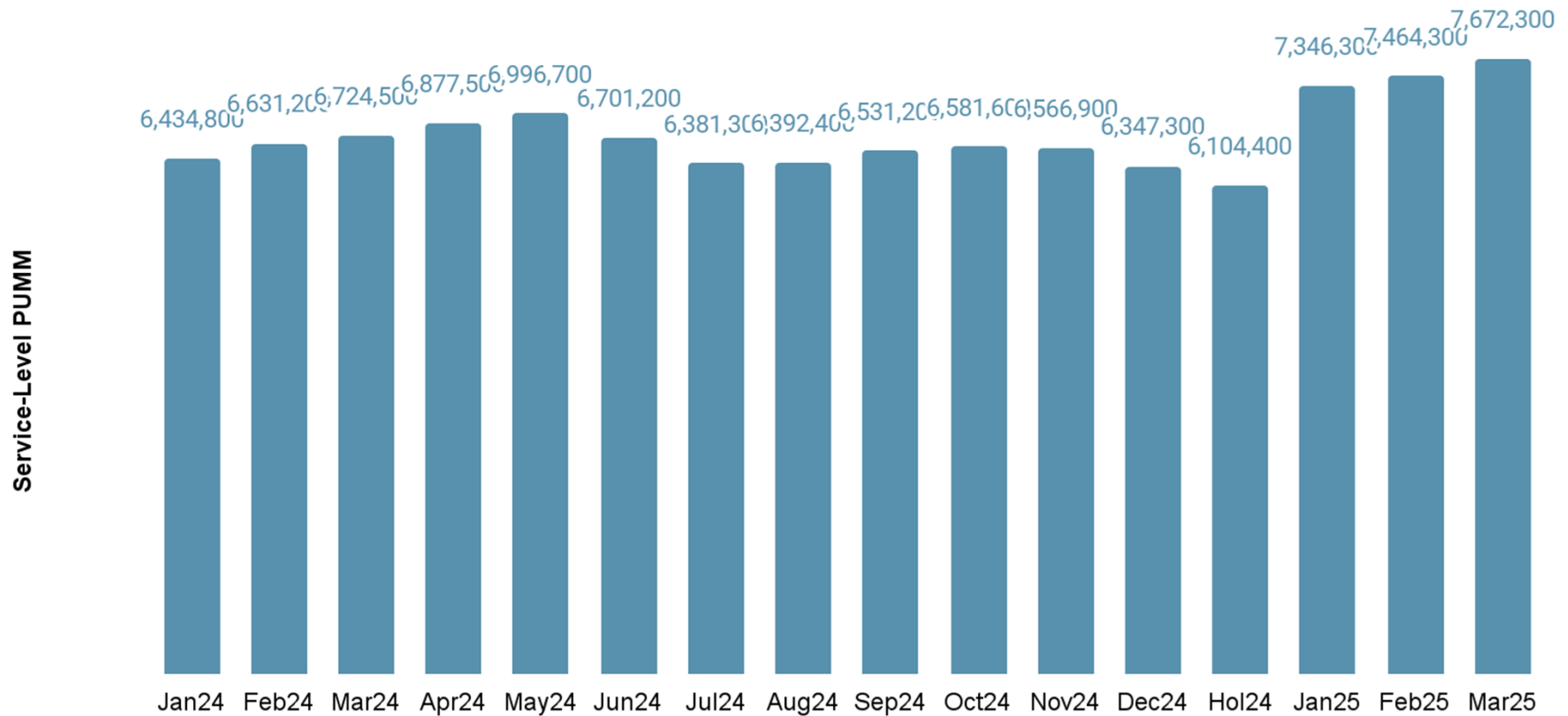
Source: PPM Metro Market Totals (45 non-embedded markets). Persons 6+, Mon-Sun 6a-Mid. Market Total AQH Persons (PUMM)

Average increase Q4 2024 to Q1 2025

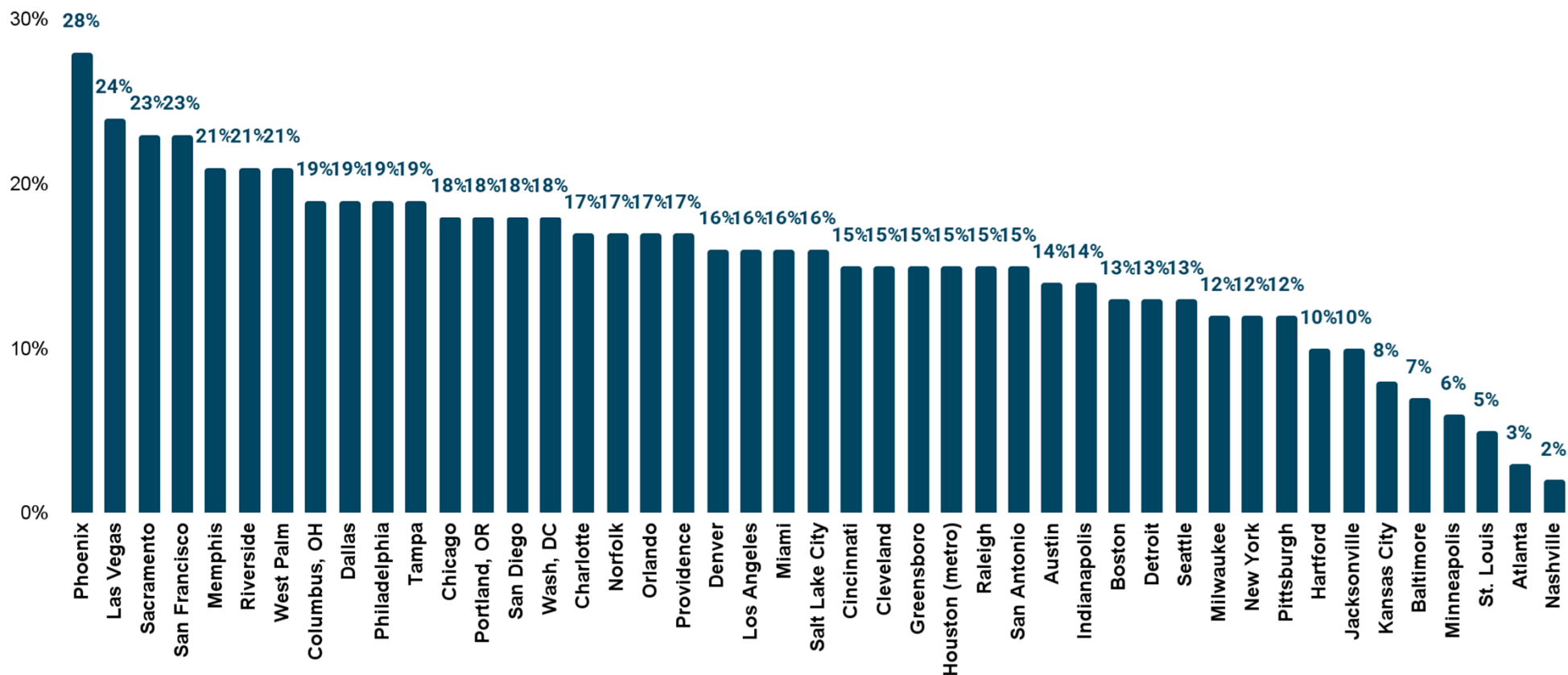Jan/Feb/Mar 2025 vs Oct/Nov/Dec 2024 - total listening (PUMM)

Nielsen PPM Markets (45 non-embedded metro markets│43 Black DST markets│42 Hispanic DST markets). Jan/Feb/Mar25 vs Oct/Nov/Dec24 Mon-Sun 6a-Mid.

Average increase in AQH by market from Q4 to Q1

Jan/Feb/Mar25 vs Oct/Nov/Dec24 PPM markets (P6+) - total market listening

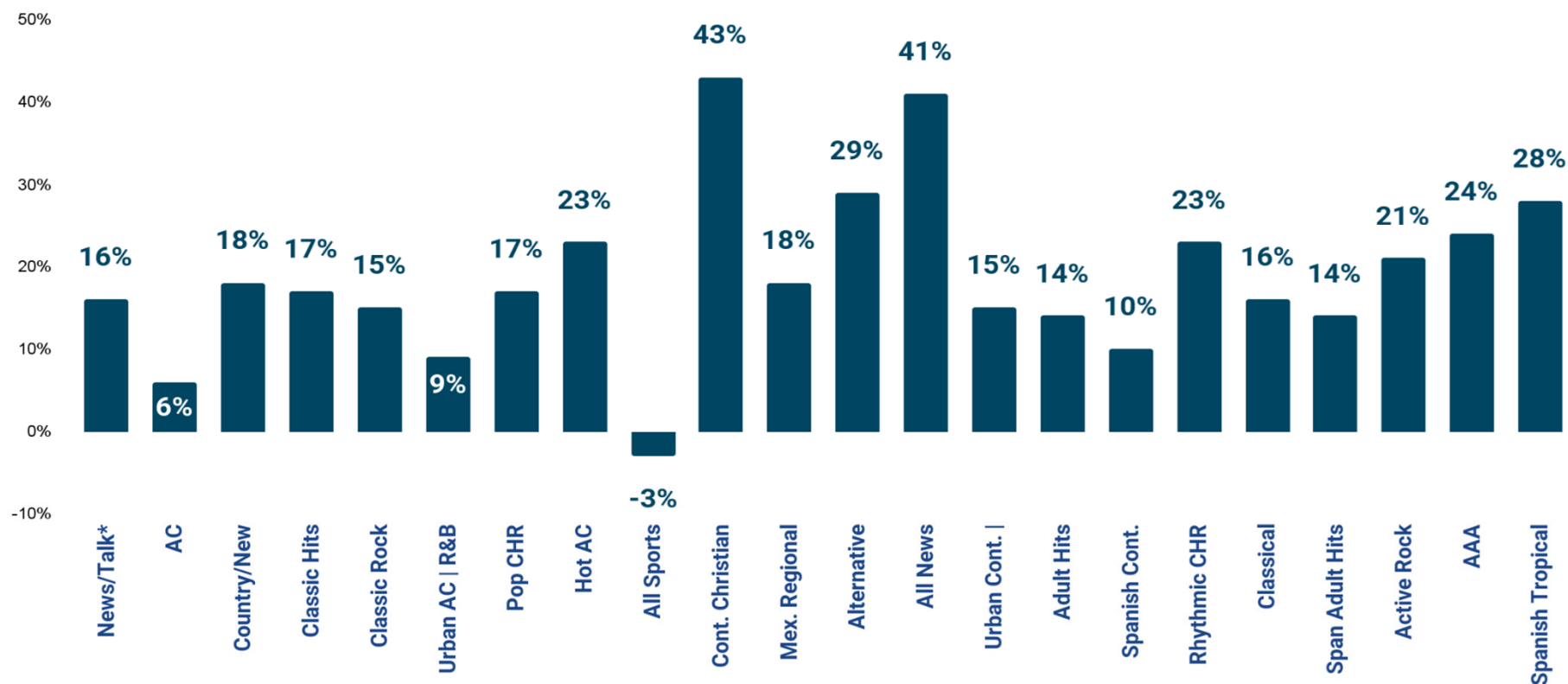Nielsen PPM Markets (45 non-embedded metro markets). Jan/Feb/Mar25 vs Oct/Nov/Dec24 Mon-Sun 6a-Mid.

Nielsen

Average increase in AQH by format from Q4 to Q1

Jan/Feb/Mar25 vs Oct/Nov/Dec24 PPM markets (P6+) - total market listening

Nielsen PPM Markets (45 non-embedded metro markets). Jan/Feb/Mar25 vs Oct/Nov/Dec24 Mon-Sun 6a-Mid.

Fundamental listening metrics

Top 20 most listened-to radio formats (from All News to Spanish Tropical)

In general, by moving to 3MQ the following has happened:
➔ Avg number of stations per week is up slightly (extra station)
➔ Station-level daily cume has therefore increased
➔ Avg number of daily radio occasions is up slightly
➔ Minutes per occasion is lower

Daily Cume (rating)	+9%
Daily Time Spent	+5%
Daily Occasions	+1%
Daily TSL per Occasion	-12%

P1 % of AQH	-4%
P1 Daily Time Spent	+5%
P1 Daily Occasions	+1%
P1 Daily TSL per Occasion	-12%

Nielsen PPM Markets (45 non-embedded metro markets). Feb25 vs Nov24 Mon-Sun 6a-Mid.

Nielsen

PPM Schedule Comparison

How Will A Schedule Change from Q4 to Q1?

45 PPM Market Average for Adults 25-54 – All Rated Commercial AM/FM Stations

	LIGHT +/- 10 spots/wk			**MEDIUM** +/- 20 spots/wk			**HEAVY** +/- 40 spots/wk		
AD 25-54	Q4 2024	Q1 2025	**Increase**	Q4 2024	Q1 2025	**Increase**	Q4 2024	Q1 2025	**Increase**
GRPs	100.0	119.4	**+19%**	200.0	238.8	**+19%**	400.0	477.8	**+19%**
Reach %	50.2%	53.6%	**+7%**	65.9%	68.7%	**+4%**	78.1%	80.1%	**+3%**
Frequency	2.1	2.3	**+8%**	3.2	3.5	**+10%**	5.4	6.1	**+13%**
Impr.	1,713,484	1,978,907	**+15%**	3,426,769	3,957,867	**+15%**	6,853,938	7,915,733	**+15%**

Source: Nielsen PPM Schedules in Tapscan, Q4 2024 vs Q1 2025, Adults 25-54, All rated commercial AM/FM Stations

Nielsen

Similar Gains Seen In Other Buying Demos

Thanks to Westwood One for this analysis

Oct24 to Feb25	Impressions	GRPs	Reach	Reach %	Frequency
Adults 25-54	+15%	+15%	+2%	+2%	+12%
Adults 18-34	+16%	+16%	+5%	+5%	+9%
Adults 18-49	+15%	+15%	+3%	+3%	+12%
Men 18+	+14%	+14%	+3%	+3%	+10%
Women 18+	+13%	+13%	+3%	+3%	+9%
Hispanic Adults 25-54	+15%	+12%	+5%	+3%	+10%
Black Adults 25-54	+12%	+11%	+3%	+3%	+7%

Source: 45 Nielsen PPM Metro, Oct 24 vs. Feb 25, One Month schedule comparison at 400 GRPs for Adults 25-54 via ACT1 software

◀▷ Nielsen

Implications

➔ Individual results may vary

➔ Year over year comparison may look different

➔ Heavy schedules will see smaller reach gains

➔ Frequency rises faster with reach gains

➔ Results are similar across other demos

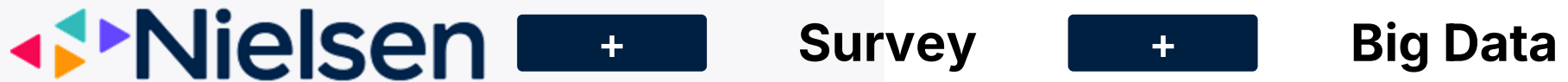Nielsen

Benefits of adopting the 3 minute qualifier

- **Grow measurable ad impressions**
- Reporting **robust daily cume, improved stability**
- **Expands advertiser choice** with more viable dayparts and formats
- **Programming freedom** to optimize commercial placement
- Help your **top market index** on national buys
- More **Ad occurrence impressions for mix models**
- More inputs into **attribution** and **outcomes measurement**

Nielsen

Nielsen **+** **Survey** **+** **Big Data**
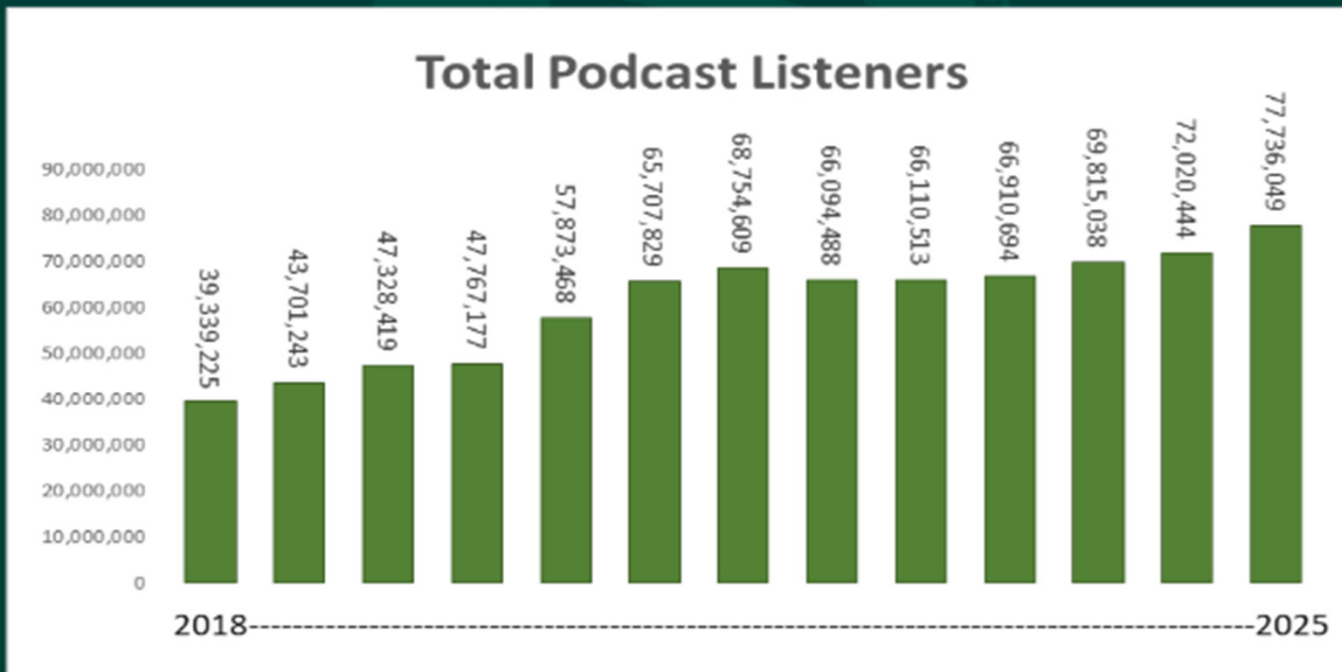
For the first time, Nielsen, in partnership with leading data sources, is unlocking the ability to plan on **podcasts** as a media type**.**

A new media to Nielsen's cross-platform planning capabilities and creates **more enhanced audio** media planning use cases.

TARGETED FOR AVAILABILITY IN Q3 2025

Nielsen

Need to Know

- Not Just Measurement… Planning

- Podcast data alongside Google, Hulu, TikTok, Netflix etc.

- Agencies want justification

- Podcasting moves beyond novelty

Nielsen

Cross-platform planning, fueled by fusion

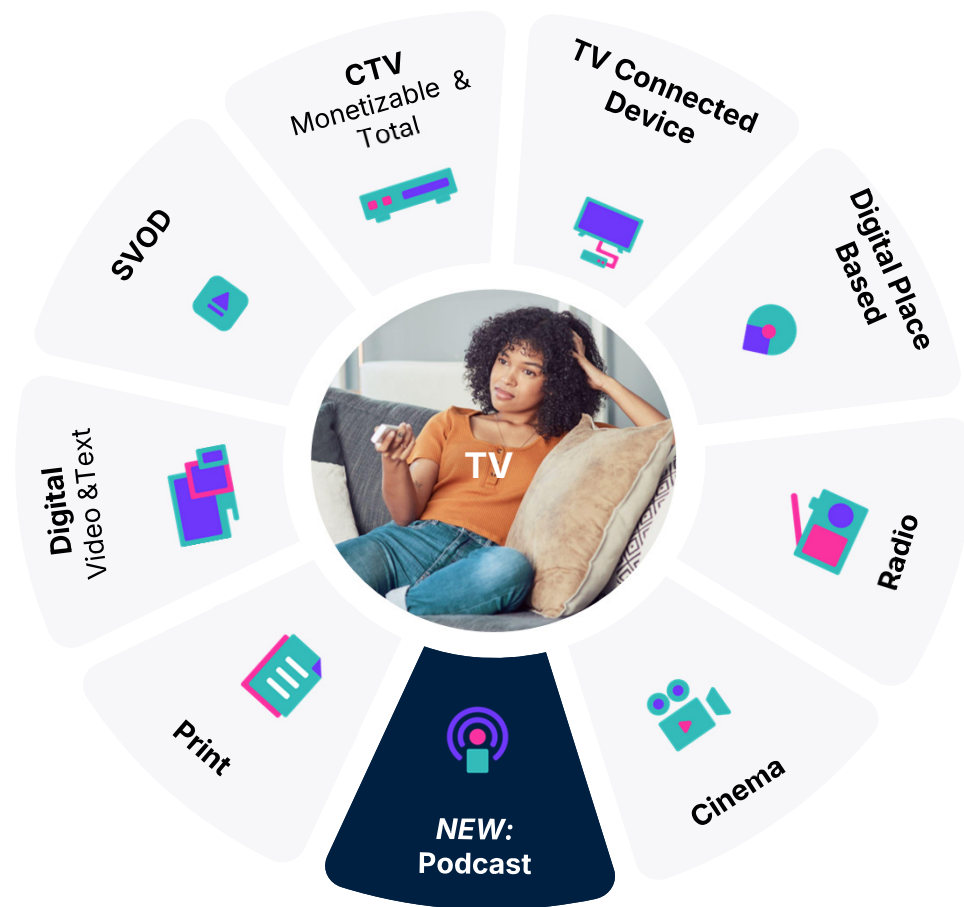✓ Links media consumption across media/platforms

✓ Census and respondent level data for granular media planning

✓ Supports user-defined advanced audiences

*Video includes pc panel/census and mobile census viewing

Nielsen

Nielsen Media Impact:
Where Media Plans Are Born

~60% AGENCIES

~25% MEDIA OWNERS

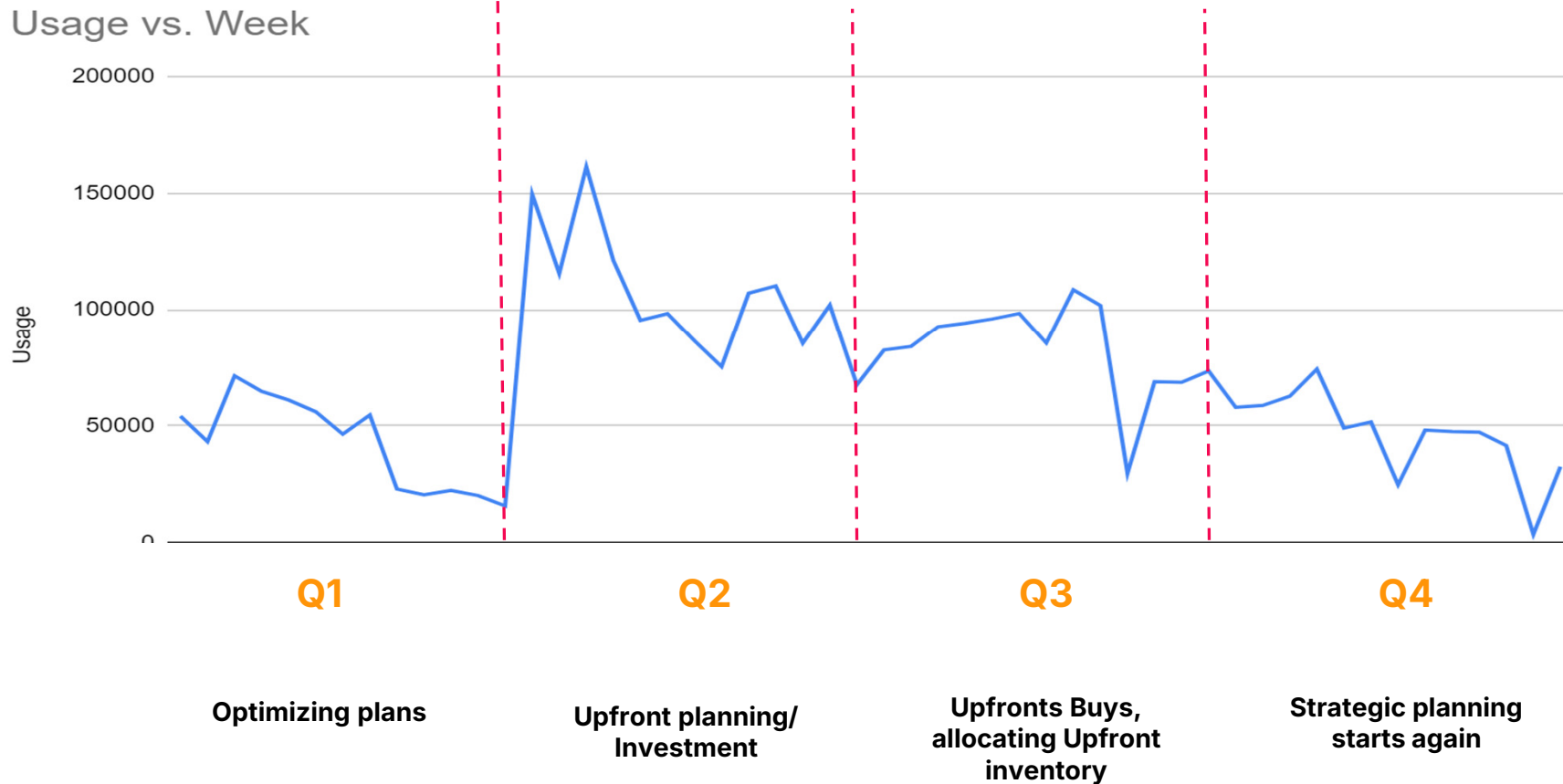| Agencies	Advertisers	Media Owners
group planning director	media insights & analytics	research director / vp insights & measurement
media planner / media director		director media roi
strategy planner		
director, communications planning	media brand manager	vp connections & digital research / director ad sales research
vp analytics		
svp group account director		
head of data science	media strategy	research analyst / global sales manager
business intelligence manager		
sr director, integration lead		
planner, connections planning		
analyst, audience knowledge team		

~15% ADVERTISERS

% based on average globally; varies market by market

Nielsen

Annual Planning in NMI: Usage (70% in digital & video)

Usage vs. Week

Q1 — Optimizing plans

Q2 — Upfront planning/ Investment

Q3 — Upfronts Buys, allocating Upfront inventory

Q4 — Strategic planning starts again

Nielsen

Podcasting + CTV Adds Incremental Reach

Podcasting expands the reach of Netflix by 14%

Legend: Podcasting | Netflix | Podcast + Netflix

Demographic	Podcasting	Netflix	Podcast + Netflix
Adults 18-34	29.6%	59.4%	68.0%
Adults 25-54	37.8%	67.9%	77.6%
Adults 35-64	30.4%	62.7%	71.1%
Adults 50+	19.4%	49.6%	58.7%
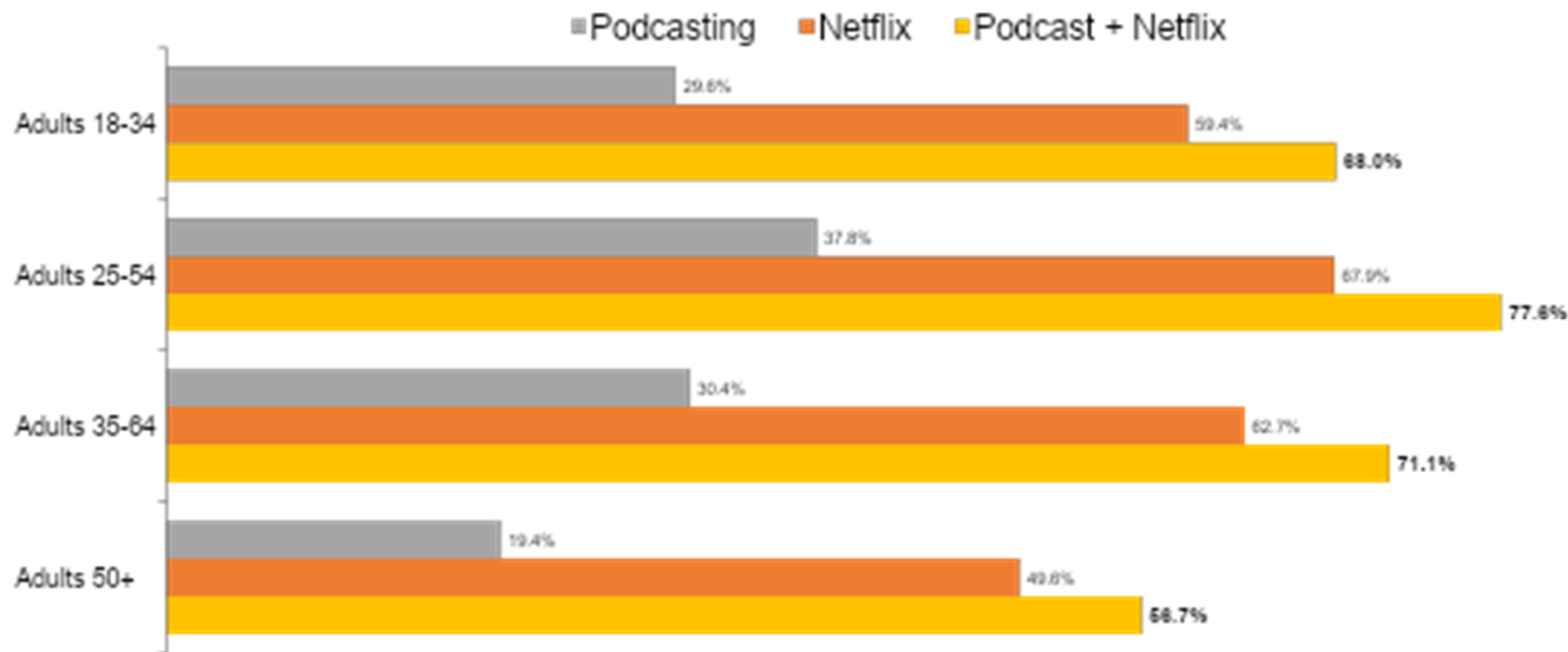
Source: Nielsen Media Impact, Monthly Reach, R2 2024

Nielsen

Theoretical Example: For Demonstration Purposes Only
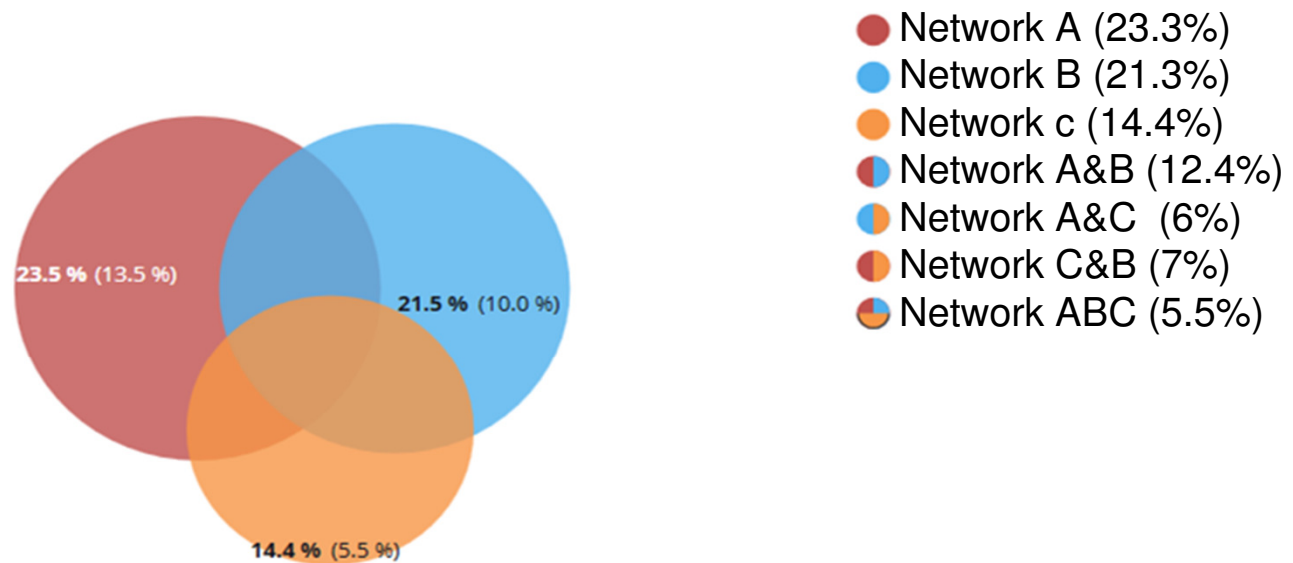
Adding Podcasting more than doubles the Net Reach!

Original Plan

Social (A25-44)	Social	40,000. Impressions (000)
CTV (Adults 18+)	CTV	8,000. Impressions (000)
YouTube (A25-44)	YouTube	10,000. Impressions (000)
Digital (A25-44)	Digital	15,000. Impressions (000)
Podcast Network	Pod	0. GRPs

Planning target	A25-54 AND HHI $125K+ AND Fashio...
GRPs	75
Impressions (000)	12,963
Net reach (1+)	17.94 %
Effective reach (3+)	8.31 %
Avg Freq	4.19
Budget	$ 905,000

Theoretical Example: For Demonstration Purposes Only

Total Reach (%) - Adults 18+

- ● Network A (23.3%)
- ● Network B (21.3%)
- ● Network c (14.4%)
- ◑ Network A&B (12.4%)
- ◑ Network A&C (6%)
- ◑ Network C&B (7%)
- ◔ Network ABC (5.5%)

23.5 % (13.5 %)

21.5 % (10.0 %)

14.4 % (5.5 %)

Based on 12/1/24 - 12/28/24 (Total Universe 18+)
Content definitions: TV Programs Big Data Commercial viewing within 3 days after the broadcast, TV Programs Panel Only Live viewing within 7...
Reach definitions: Ad Monetizable Video At least one page impression, TV Programs Big Data Minimum thirty second, C+3, Subscription Video o...

Plan, optimize and compare different media types - now including podcasts - all in one place

Custom target analytics

Import custom segments to see what owned channels and vehicles have the highest reach opportunities

Share shift (what if)

Analyze reports to see the impact of shifting dollars or GRPs from certain media to another media

Media allocation

Optimize on existing plans while retaining Budget or GRP & Identify the media to use for advanced targets

Save budget

Find the best media to use with the adjusted dollar amounts

Nielsen

In Summary

➔ Radio's performance is vastly underestimated by Marketers, **we can address this**

➔ Nielsen has improved data capture and audience levels are now the **highest since 2022,** benefiting formats and stations across all markets

➔ Radio Schedules are showing increased impressions, reach and frequency.

➔ Nielsen Media Impact **validates increased Audio allocation** in the media plan.

Nielsen