



FCC ADVISORY COMMITTEE ACCESS TO CAPITAL SYMPOSIUM

November 6, 2020

HIGHLIGHTS

NIELSEN'S DE & I INITIATIVES

BROADCASTER REPORTING POLICY UPDATES

MEASURING DIVERSE COMMUNITIES AND METHOD ENHANCEMENTS

WHAT'S HAPPENING WITH RADIO LISTENING

Q & A





NIELSEN DE&I INITIATIVES

DIVERSITY EQUITY & INCLUSION AT NIELSEN

HIGHLIGHTS

- **Commitment to Fight Racism**
 - Trust & Accountability
 - Safety
 - External Influence
- **Small Business Support**
 - New resource for Black-owned small business owners to find opportunity, support and community—powered by Nielsen's Data
 - Insights to fuel growth
 - Pro bono consulting
 - Promote supplier diversity beyond our organization
 - Expansion planned in 2021 to support all minority-owned small businesses
- **Community Engagement & Grassroots work**
 - Building trust with diverse communities/Census/Voter outreach
 - Expansion of Diverse Thought leadership



BROADCASTER REPORTING POLICY UPDATES

NEW AUDIO INCLUSION & EQUITY INITIATIVES

HIGHLIGHTS

- **Inclusion for Minority-owned & non profit broadcasters**
 - Minority-owned broadcasters and non-profits, who meet the criteria, will be reported in the Summary Data Set (Jan.PPM Monthly)
 - More than one mention in the metro (M-SN 6a-Mid, P6+)
 - Annual revenue of <\$7M per market at the cluster level
 - Non-profit stations either publicly owned or holding 501(c)(3) tax status.
- **Expanding choice station self ID**
 - Introducing new format options for self reporting 1Q 21
 - Urban Contemporary OR Hip Hop/R&B
 - Urban Adult Contemporary OR R&B
 - Urban Oldies OR R&B Oldies



MEASURING DIVERSE COMMUNITIES AND METHOD ENHANCEMENTS

ETHNIC IN-TAB

Average Across Aggregate of 48 PPM and 44 CDM markets

	October PPM INDEX TO TARGET	
	OCT19	OCT20
P6+	111	109
Black P6+	127	118
Hispanic P6+	114	115

	Sept CDM INDEX TO TARGET	
	SEP19	SEP20
P12+	106	106
Black P12+	102	99
Hispanic P12+	84	84

How to Read: Nielsen's PPM in-tab was 18% greater than target among Black persons 6+ in October 2020

HEADPHONE ADJUSTMENT

Why:

- Help account for the variety of ways panelists hear radio station streams

What:

- Online survey of ~5,000 former PPM panelists asking about listening/headphone usage
- Using the survey results to calculate lift for encoded streams

How:

- Quantify the relationship of headphone listening to streaming radio and calculate demographic factors

When:

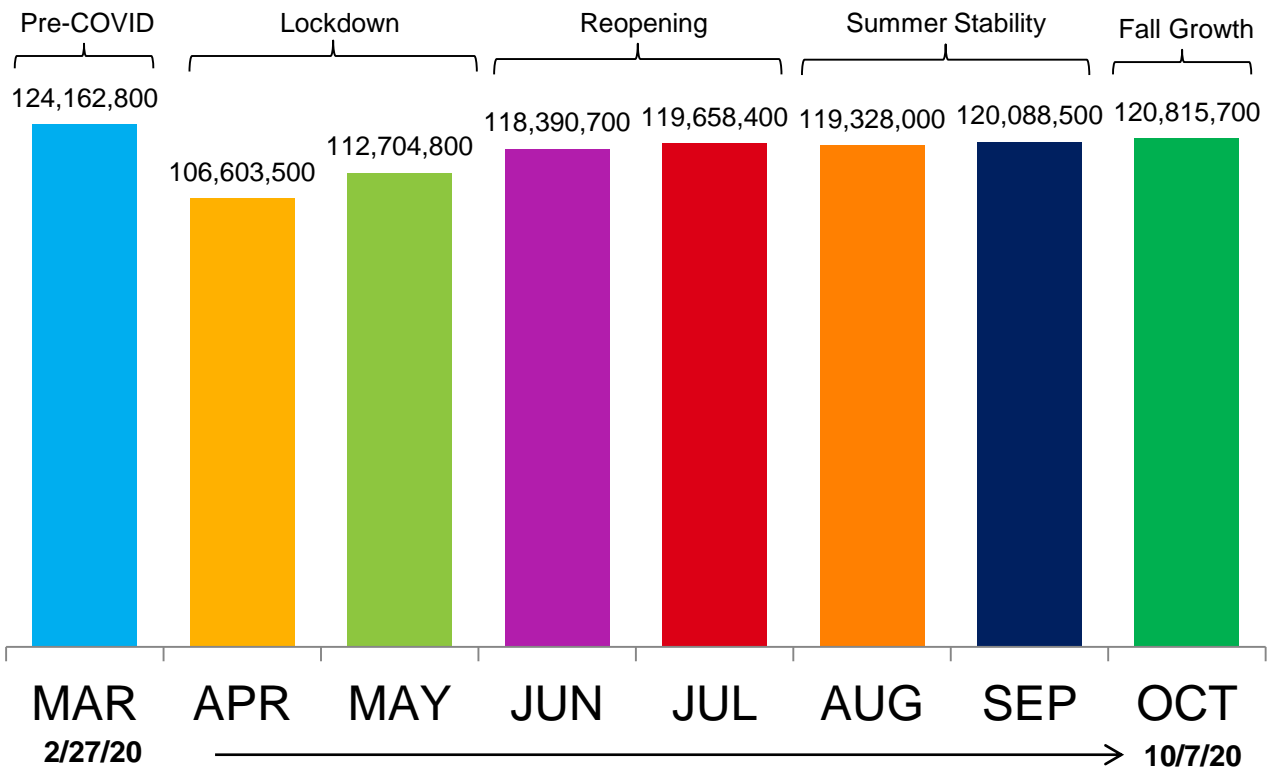
- NOW with October 2020 PPM monthly data



WHAT'S HAPPENING WITH RADIO LISTENING

RADIO'S WEEKLY REACH NOW 97% OF MARCH

PPM Average Weekly Cume in October 2020 compared to March 2020



REACH RECOVERY FORMULA

$$\frac{120,815,700}{124,162,800} \times 100 = 97$$

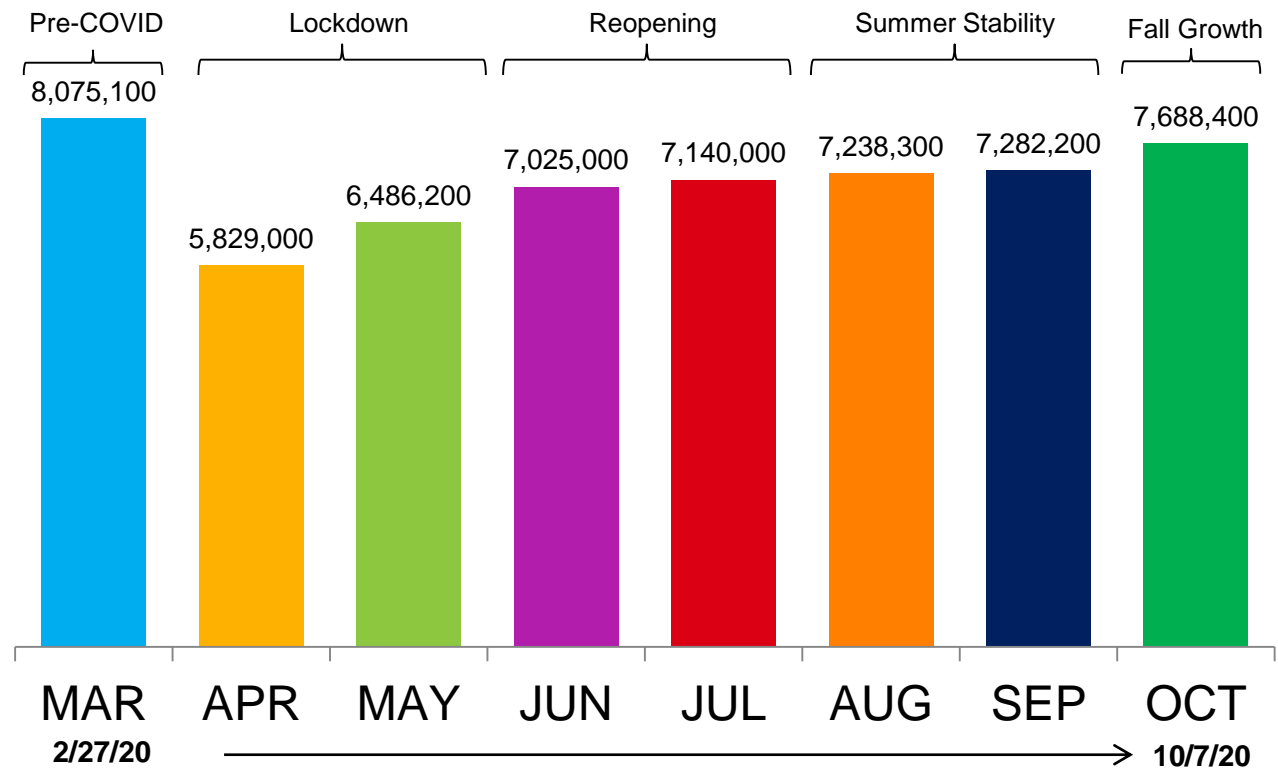
CUME PERSONS



Source: Nielsen March-October 2020 PPM / 45 Market Total / M-Su 6a-12M / Persons 12+ / Weekly Cume Persons

RADIO'S AQH IS NOW 95% OF MARCH'S LEVEL

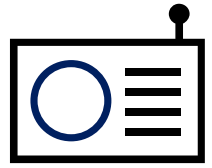
PPM Average Quarter-Hour Persons in October 2020 compared to March 2020



AQH RECOVERY FORMULA

$$\frac{7,688,400}{8,075,100} \times 100 = 95$$

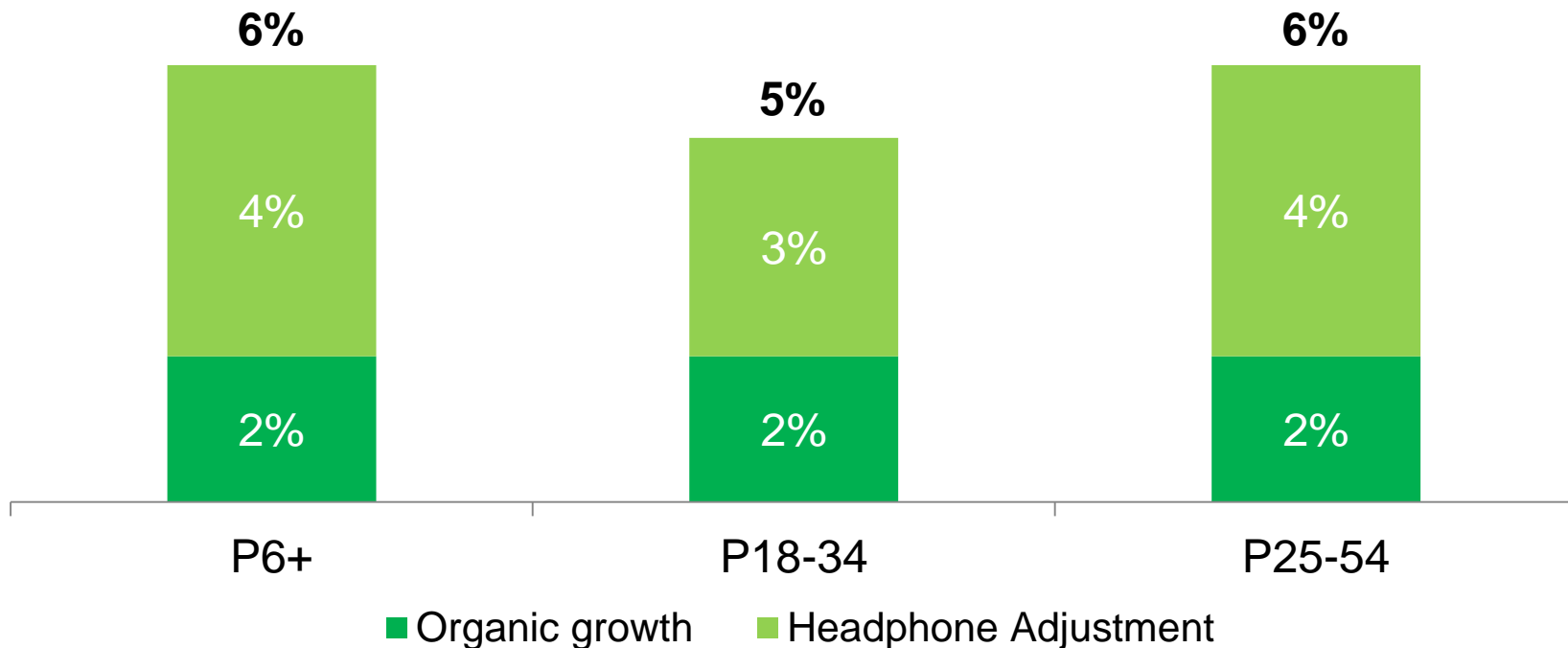
AQH PERSONS



Source: Nielsen March-October 2020 PPM / 45 Market Total / M-Su 6a-12M / Persons 12+ / AQH Persons (Persons Using Radio)

PPM's OCTOBER AQH GROWTH

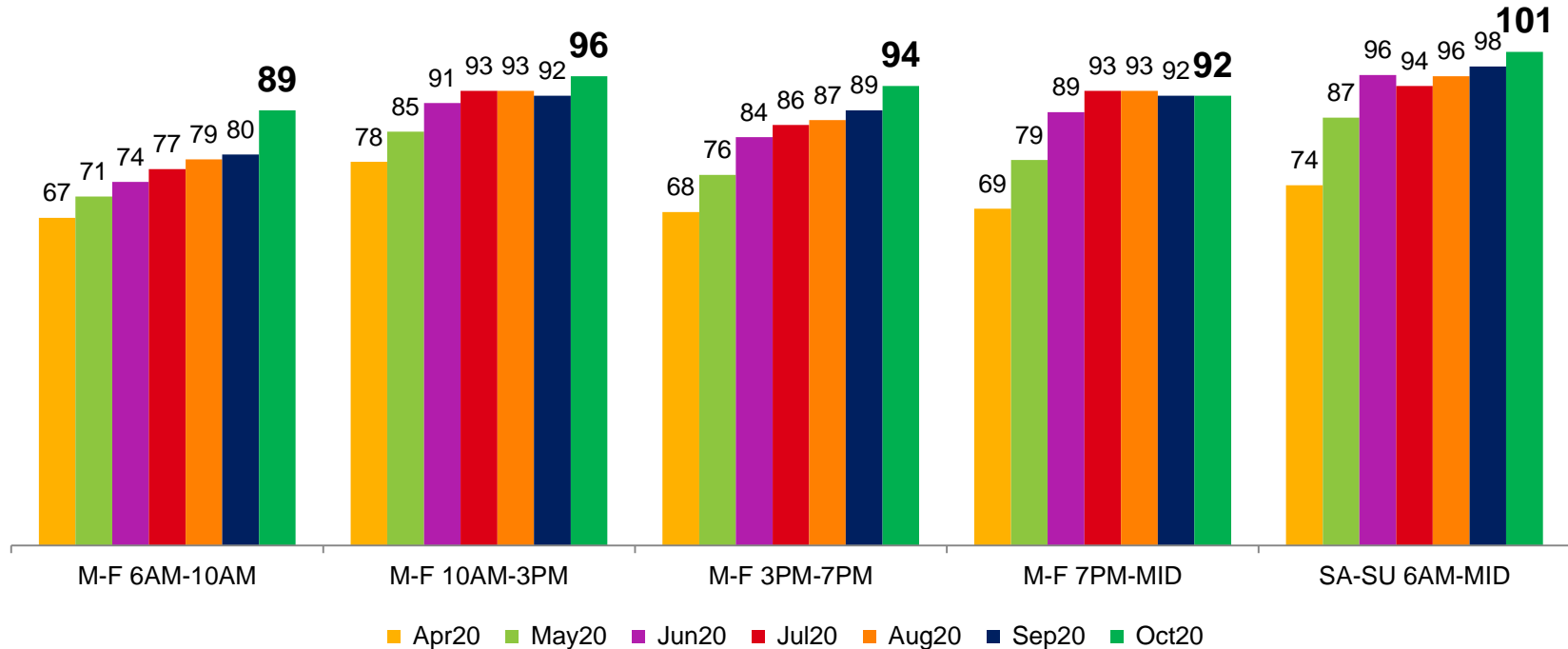
PPM Average Quarter Hour Versus Compared to September 2020



Source: Nielsen September-October 2020 PPM / 45 Market Total / M-Su 6a-12M / Persons 12+ / AQH Persons (Persons Using Radio)

DRIVE TIME & DAYTIME RECOVERY CONTINUES – WEEKENDS SURPASS MARCH

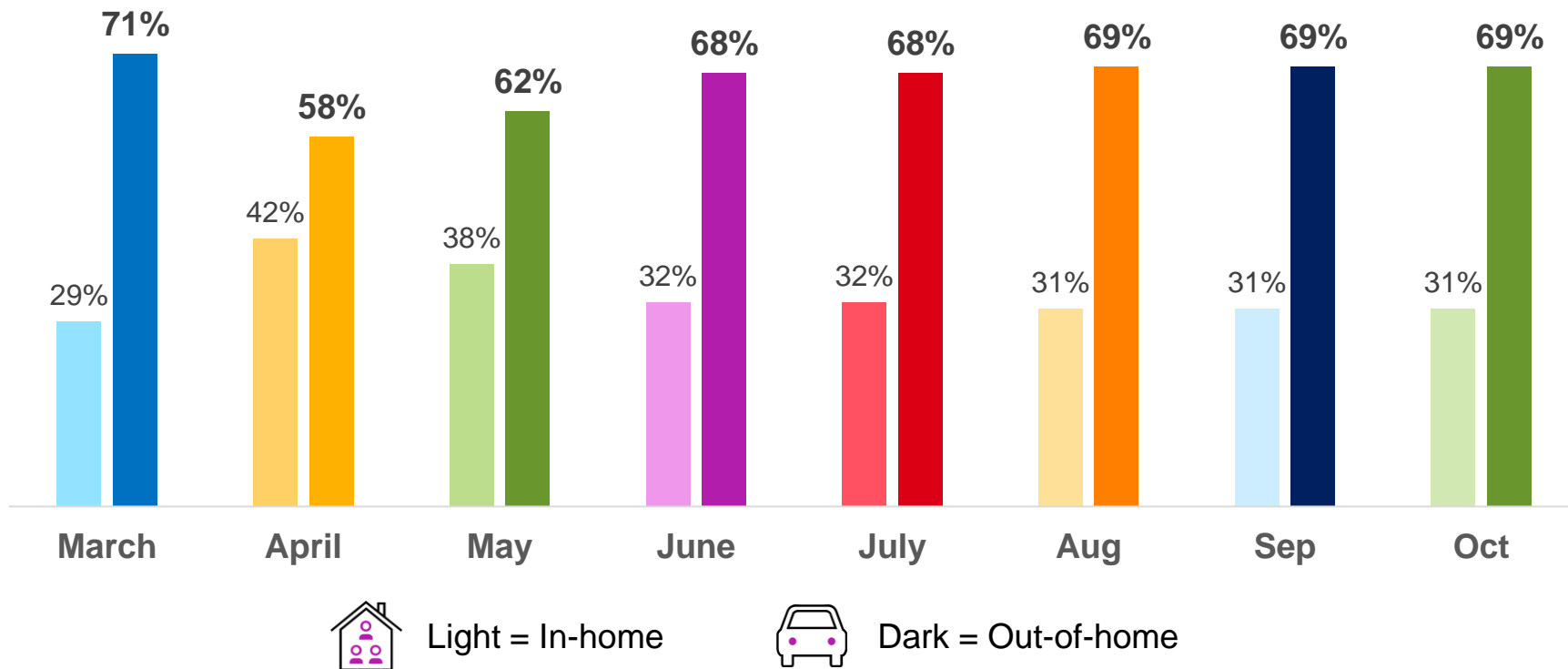
PPM Average Quarter Hour Recovery by Daypart versus March 2020



Source: Nielsen March-October 2020 PPM / 45 Market Total / Persons 12+ / AQH Persons (Persons Using Radio) Index

NEARLY 70% OF AQH LISTENING IS OUT-OF-HOME

PPM Share of listening in and out of home across all PPM markets



Source: Nielsen March-October 2020 PPM / 45 Market Total / M-F 6a-7p / Persons 18+ / AQH Persons by Location

PPM SHARE BY FORMAT – MOST FORMATS VERY CONSISTENT

AQH Share	MAR20	APR20	MAY20	JUN20	JUL20	AUG20	SEP20	OCT20
News Talk (commercial & non-commercial)	13.3%	15.0%	13.6%	12.7%	12.6%	12.9%	13.2%	13.8%
Adult Contemporary	7.7%	6.4%	6.5%	7.1%	7.6%	7.4%	7.3%	7.0%
Country	6.0%	6.3%	6.6%	6.8%	6.7%	6.4%	6.6%	6.2%
Classic Rock	5.4%	6.1%	6.0%	6.1%	5.8%	5.8%	5.9%	5.6%
Classic Hits	5.5%	5.3%	5.5%	5.9%	5.8%	5.7%	5.7%	5.6%
Pop CHR	5.1%	4.2%	4.4%	4.7%	4.9%	4.9%	4.8%	4.6%
All Sports	4.1%	3.5%	3.7%	3.3%	3.3%	3.8%	3.8%	4.5%
Urban Adult Contemporary R&B	4.2%	4.3%	4.4%	4.4%	4.5%	4.3%	4.5%	4.4%
Hot Adult Contemporary	4.2%	3.5%	3.8%	4.1%	4.2%	4.3%	4.1%	3.9%
Mexican Regional	3.1%	3.5%	3.4%	3.3%	3.3%	3.3%	3.3%	3.2%
Spanish Contemporary	2.7%	2.5%	2.4%	2.5%	2.5%	2.5%	2.6%	2.5%
All News	2.9%	2.8%	2.6%	2.6%	2.6%	2.6%	2.5%	2.4%
Urban Contemporary Hip Hop/R&B	2.7%	2.6%	2.8%	2.8%	2.6%	2.5%	2.4%	2.3%
Alternative	2.5%	2.4%	2.4%	2.7%	2.8%	2.5%	2.4%	2.2%
Contemporary Christian	2.2%	2.2%	1.9%	2.0%	1.9%	2.0%	2.1%	1.9%

Source: Nielsen March-October 2020 PPM / 45 Market Total / M-F 6a-7p / Adults 18+ / Average Quarter Hour Share

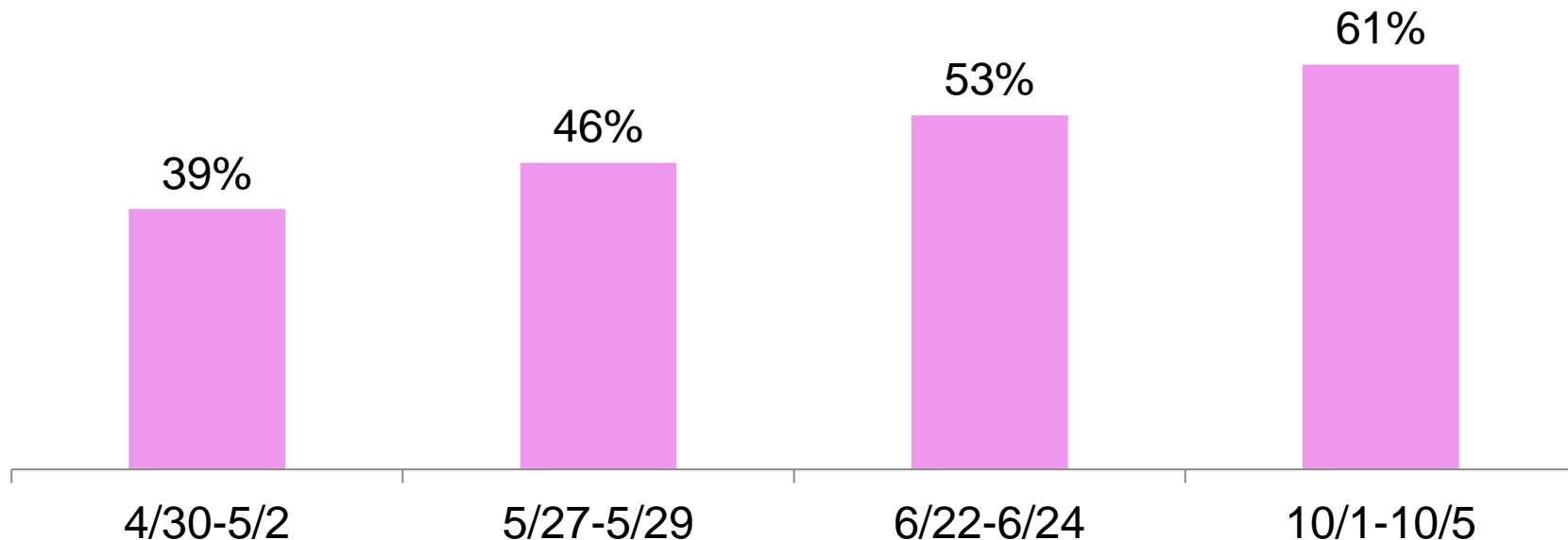


CONSUMER STUDY

Conducted 4/30-5/2, 5/27-5/29, 6/22-6/24, and 10/1-10/5, 2020
National online survey of 1,000 persons 18+

AMONG THOSE EMPLOYED, MORE WORKING 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*

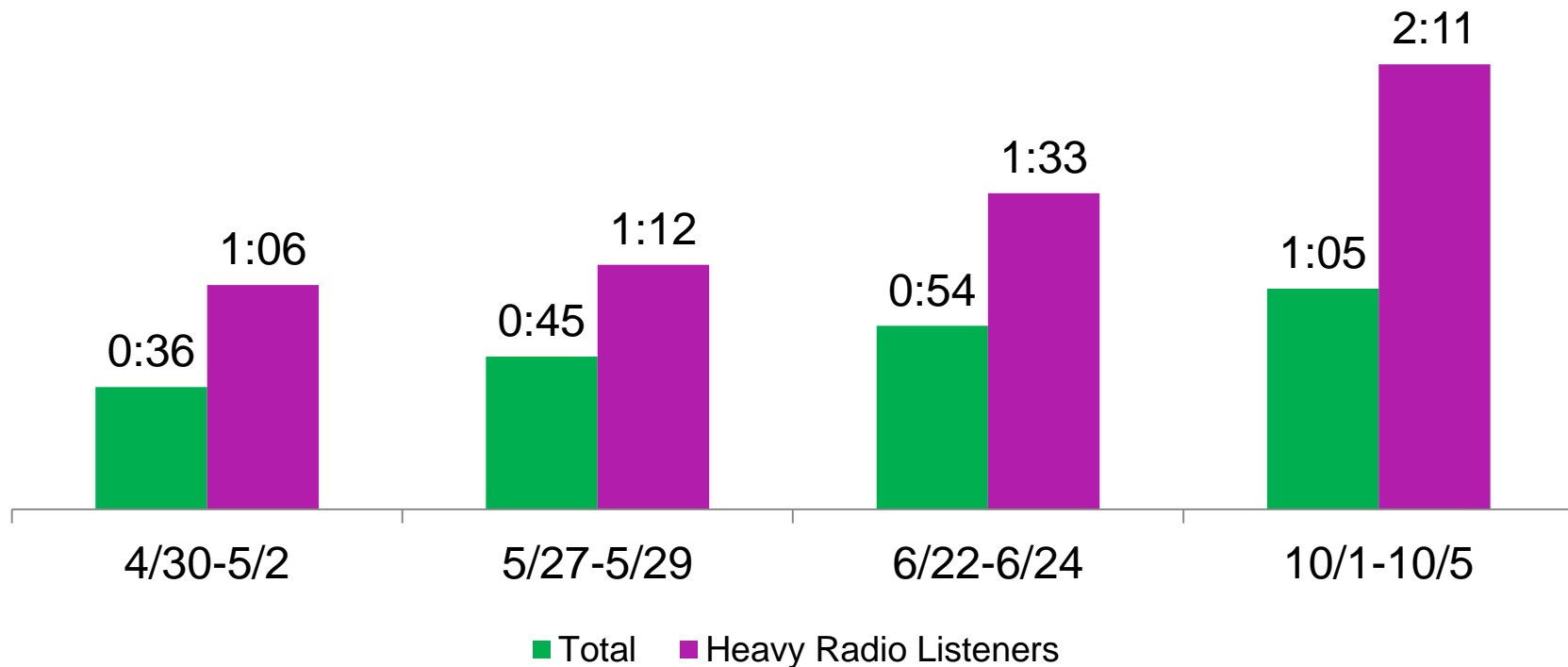


Source: Custom Nielsen study conducted 4/30 – 5/2, 5/27 – 5/29, 6/22-6/24 & 10/1-10/5, 2020 via an online survey, based on a weighted sample of 1000, P18+

*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 (56%) as the total employed population

TIME SPENT IN VEHICLE CONTINUES TO RISE ESPECIALLY AMONG HEAVY RADIO LISTENERS

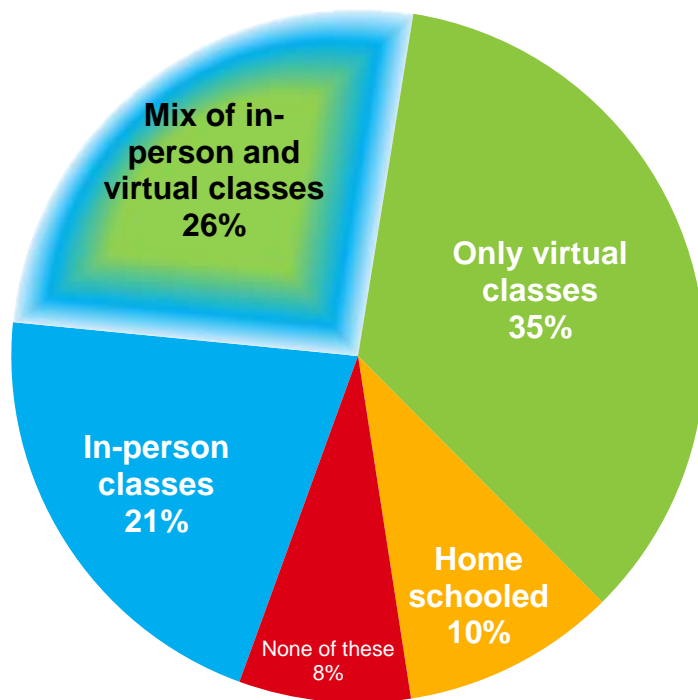
How much time did you spend in your car/truck yesterday?



Source: Custom Nielsen study conducted 4/30 – 5/2, 5/27 – 5/29, 6/22-6/24 & 10/1-10/5, 2020 via an online survey, based on a weighted sample of 1000, P18+

NEARLY HALF ARE ATTENDING SOME IN-PERSONS CLASSES

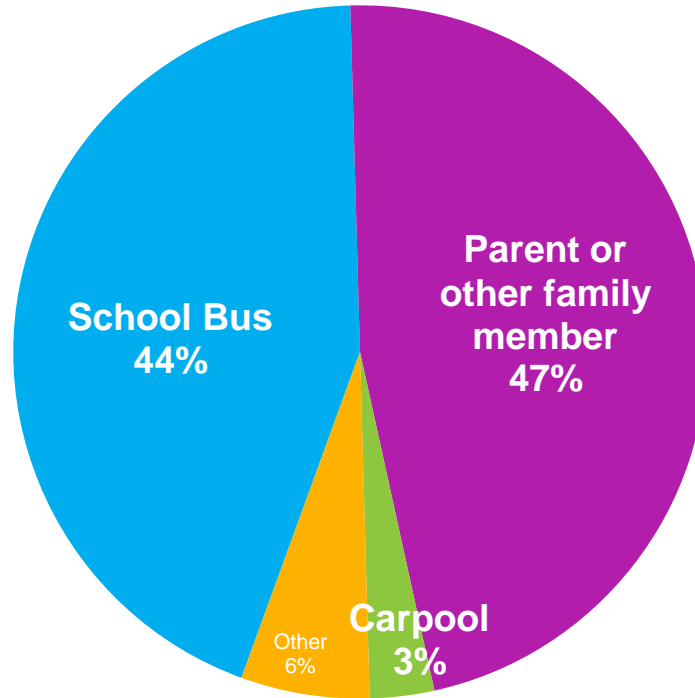
Which of the following best describes your child(ren)'s current schooling situation?



Source: Custom Nielsen study conducted 10/1-10/5, 2020 via an online survey, based on a weighted sample of 1000, P18+

AMONG THOSE ATTENDING CLASSES, HALF GET TO SCHOOL IN A VEHICLE

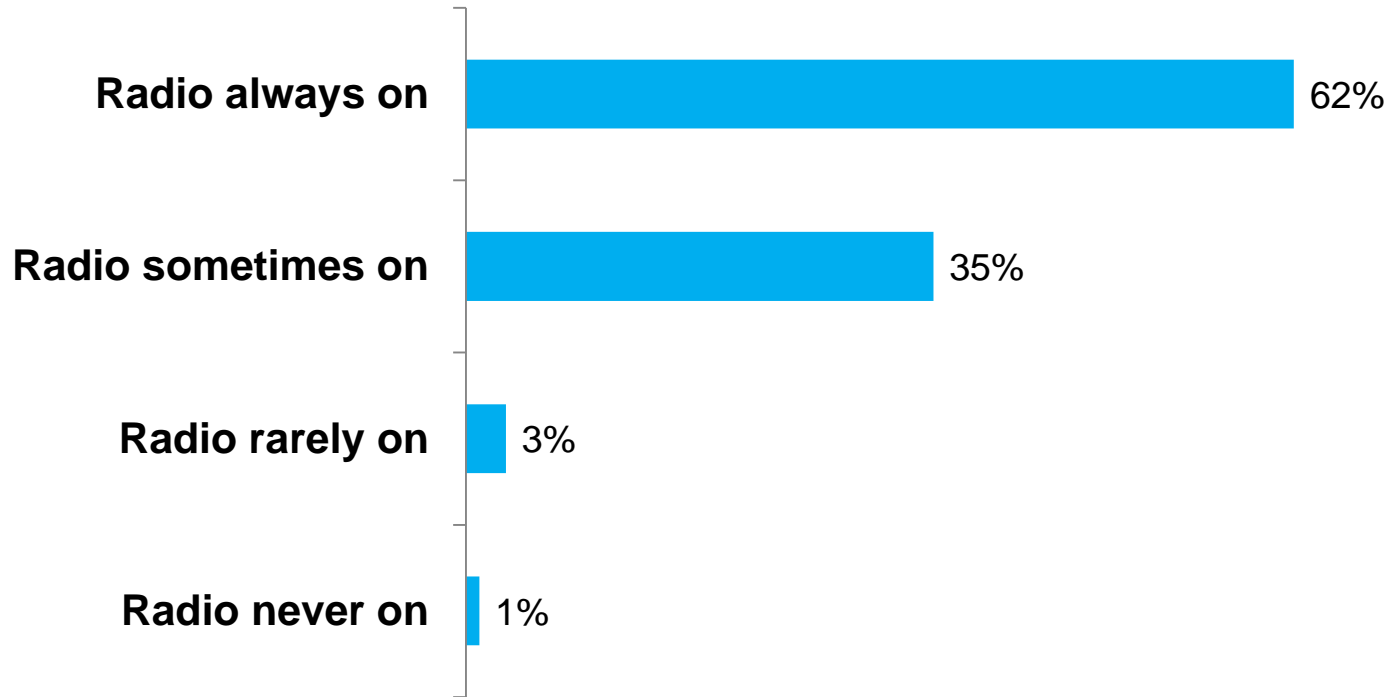
How are your children being transported to school?



Source: Custom Nielsen study conducted 10/1-10/5, 2020 via an online survey, based on a weighted sample of 1000, P18+

RADIO IS ON DURING THE DRIVE TO SCHOOL

During the drive to school, how frequently are you/your children listening to the radio?



Source: Custom Nielsen study conducted 10/1-10/5, 2020 via an online survey, based on a weighted sample of 1000, P18+

For additional information:

<https://www.nielsen.com/us/en/small-business-support/>

<https://www.nielsen.com/us/en/solutions/capabilities/audio>



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