Audio Client COVID-19 Update

March 26, 2020
WHAT WE WILL COVER ON THE CALL

• Nielsen Audio PPM panel and Diary sample KPIs and what we are doing to maintain quality

• Results of a freshly fielded survey: The COVID crisis and Radio
PPM panel and Diary sample KPIs and what we are doing to maintain quality
DATA RELEASES

- PPM MAR20 Week 2 release begins 03/30
- PPM MAR20 monthly PPM release begins 04/15
- Diary MAR20 CDM (J/F/M) release begins 04/13

MONITORING

- Continued monitoring and daily check-ins on survey operations

COMMUNICATION

- Ongoing communication with stakeholders and clients
FLASH SURVEY:
COVID CRISIS AND RADIO

March 2020
KEY TAKEAWAYS

RADIO KEEPS US INFORMED AND CONNECTED DURING A CRISIS

RADIO IS A TRUSTED SOURCE OF INFORMATION

RADIO LISTENING IS SHIFTING TO MORE DEVICES

RADIO LISTENERS ARE READY TO SHOP
Nielsen conducted a survey to gauge the impact to radio listening behavior as a result of the Coronavirus outbreak.

**SAMPLE SIZE**
1000 Adults 18 and over in the US

**SURVEY LENGTH**
4 – 5 minute survey conducted online

**TIMING**
Survey fielded Friday March 20th, Saturday March 21st and Sunday March 22nd

**WEIGHTING**
Simple weighting was applied to balance the sample on age, gender, ethnicity, education and census region

**CAVEATS**
Because the effects of the virus continue to evolve, opinions expressed in the survey are limited only to what was known at the time.
92% ARE CONCERNED ABOUT CORONAVIRUS

How concerned are you about COVID-19 (Coronavirus)?

Source: Custom Nielsen study conducted March 20-22 via an online survey, based on a weighted sample of 1000 adults 18+
YOUNGER AUDIENCES ARE LESS CONCERNED

How concerned are you about COVID-19 (Coronavirus)?

Source: Custom Nielsen study conducted March 20-22 via an online survey, based on a weighted sample of 1000 adults 18+
RADIO HOSTS CONNECT IN TIMES OF CRISIS

Listening to my favorite radio hosts during the COVID-19 (Coronavirus) restrictions...

- Makes me feel more informed about things I need to know: 53%
- Helps me know about what stores are open and where I can shop: 46%
- Makes me feel more connected to my community: 46%
- Makes me feel less alone: 44%
- Makes me feel less stressed: 40%
- Makes me feel less concerned/panicked: 37%

Source: Custom Nielsen study conducted March 20-22 via an online survey, based on a weighted sample of 1000 adults 18+
RADIO HOSTS CONNECT IN TIMES OF CRISIS

Do you agree with the following statements about radio hosts and COVID-19 (Coronavirus)...

![Bar chart showing percentages of different employment statuses related to feeling connected to one's community.]

Source: Custom Nielsen study conducted March 20-22 via an online survey, based on a weighted sample of 1000 adults 18+.
RADIO HOSTS CONNECT IN TIMES OF CRISIS

Do you agree with the following statements about radio hosts and COVID-19 (Coronavirus)...

<table>
<thead>
<tr>
<th>Employment Status</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employed full-time</td>
<td>51%</td>
</tr>
<tr>
<td>Temporarily unemployed due to COVID-19</td>
<td>51%</td>
</tr>
<tr>
<td>Employed part-time</td>
<td>29%</td>
</tr>
<tr>
<td>Not employed (retired, student, homemaker)</td>
<td>31%</td>
</tr>
</tbody>
</table>

Source: Custom Nielsen study conducted March 20-22 via an online survey, based on a weighted sample of 1000 adults 18+
RADIO IS A TRUSTED SOURCE OF INFORMATION

Do you agree or disagree with the statements about radio and COVID-19 (Coronavirus)...

- I trust radio to give me timely information: 60%
- Radio is a good source of information: 59%
- I trust radio to give me accurate information: 56%
- I trust the information I get from my favorite radio hosts: 53%
- I am still finding ways to listen to radio even though I am not commuting or working outside the home: 44%
- Having access to radio (on-air or online) has helped me deal with the virus outbreak: 42%

Source: Custom Nielsen study conducted March 20-22 via an online survey, based on a weighted sample of 1000 adults 18+
EDUCATED LISTENERS HAVE MORE TRUST IN RADIO

Do you agree with the following statements about radio and COVID-19 (Coronavirus)...

Source: Custom Nielsen study conducted March 20-22 via an online survey, based on a weighted sample of 1000 adults 18+
LISTENERS SEEK OUT RADIO ON NEW PLATFORMS

Because of the COVID-19 (Coronavirus) outbreak, and associated restrictions...

- I've looked for new ways to listen to my favorite radio station/personality/program: 27%
- I've used Google or other search engines to find my favorite radio station/personality/program: 26%
- I've sought out new Podcasts to get more information: 13%
- I've recently purchased a smart speaker to listen to streaming radio: 6%

Source: Custom Nielsen study conducted March 20-22 via an online survey, based on a weighted sample of 1000 adults 18+
YOUNGER LISTENERS SEEK OUT RADIO

Because of the COVID-19 (Coronavirus) outbreak, and associated restrictions...

Source: Custom Nielsen study conducted March 20-22 via an online survey, based on a weighted sample of 1000 adults 18+
8 IN 10 REPORT THE SAME OR MORE TIME WITH RADIO AS A RESULT OF COVID-19

Adults 18+

28% 55% 17%

MORE TIME

PERCENT SPENDING MORE TIME LISTENING

- AT HOME 26%
- MOBILE 19%
- PODCASTS 14%
- COMPUTER 12%
- SMART SPEAKER 10%

Source: Custom Nielsen study conducted March 20-22 via an online survey, based on a weighted sample of 1000 adults 18+
RADIO LISTENERS ARE READY TO SHOP

Which of the following activities do you plan to do in the coming week?

- Shop for groceries: 69% (Adults 18+) vs. 72% (Daily Radio Listeners)
- Get gas for my car: 47% (Adults 18+) vs. 53% (Daily Radio Listeners)
- Get take-out food from a local restaurant: 40% (Adults 18+) vs. 43% (Daily Radio Listeners)
- Go to a pharmacy/drug store: 38% (Adults 18+) vs. 41% (Daily Radio Listeners)
- Shop for alcoholic beverages: 17% (Adults 18+) vs. 21% (Daily Radio Listeners)
- Shop for home improvement goods: 12% (Adults 18+) vs. 15% (Daily Radio Listeners)

Source: Custom Nielsen study conducted March 20-22 via an online survey, based on a weighted sample of 1000 adults 18+
FREQUENT LISTENERS WILL SHOP LOCAL

Which of the following activities do you plan to do in the coming week?

RADIO USAGE

Source: Custom Nielsen study conducted March 20-22 via an online survey, based on a weighted sample of 1000 adults 18+
HOW LONG DO AMERICANS THINK THIS WILL LAST?
WHEN DO YOU THINK THE COVID-19 (CORONAVIRUS) RESTRICTIONS WILL END?

<table>
<thead>
<tr>
<th>Month</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>April</td>
<td>13%</td>
</tr>
<tr>
<td>May</td>
<td>22%</td>
</tr>
<tr>
<td>June-July</td>
<td>27%</td>
</tr>
<tr>
<td>August-September</td>
<td>11%</td>
</tr>
<tr>
<td>October-December</td>
<td>3%</td>
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</tbody>
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Don’t Know = 24%

Source: Custom Nielsen study conducted in March 20-22 via an online survey, based on a weighted sample of 1000 adults 18+
Americans trust **RADIO** to keep them informed, connect them to their community and help them deal with the outbreak.