

May 12, 2021

As you know we are focused on the important issue of being able to get accurate cross platform aggregation of audience estimates as listener consumption habits are quickly changing. Toward that goal I want to direct your attention to the series of articles in the Management section this week that deal with Nielsen measurement issues during the pandemic that affected both TV and radio. In particular, take a look at the article from Buzz Knight in Radio Ink entitled: Why Declining PUMM Levels Keep Me Up At Night.

With that set up let's take a look at the latest Nielsen audience summary data for our PPM markets. This is Week 4 of April so that month is a wrap and you will see those AQH and Cume summaries for the full month. Overall our markets continue to get back to near pandemic listening levels. The Cume numbers are especially encouraging across all the markets.

Los Angeles AQH

2020

March - 692,700

April - 455,600

May - 519,800

June - 570,700

July - 586,100 off 15.3%

August - 586,000 off 15.4%

Sept. - 570,600 off 17.6%

Oct. - 596,000 off 13.9%

Nov. - 597,400 off 13.7%

Dec. - 600,600 off 13.2%

Hol. - 563,900 off 18.5%

2021

Jan - 541,600 off 21.8%

Feb - 576,500 off 16.7%

Mar.- 606,100 off 12.5%

Apr. - 623,900 off 9.9%

Jan. Week 1 - 519,500 off 25%

Jan. Week 2 - 531,800 off 23.2%

Jan. Week 3 - 507,900 off 26.6%

Jan. Week 4 - 520,800 off 24.8%

Feb. Week 1 - 551,800 off 20.3%

Feb. Week 2 - 546,300 off 21.1%

Feb. Week 3 - 557,800 off 19.4%

Feb. Week 4 - 576,400 off 16.7%



Mar. Week 1 - 590,900 off 14.6% Mar. Week 2 - 578,500 off 16.4% Mar. Week 3 - 615,500 off 11.1% Mar. Week 4 - 639,600 off 7.7%

Apr. Week 1 - 635,600 off 8.2% Apr. Week 2 - 612,400 off 11.5% Apr. Week 3 - 620,100 off 10.5% Apr. Week 4 - 627,100 off 9.5%

Los Angeles Cume

March - 10,611,300

2020

April - 9,080,100 May - 9,572,200 June - 9,941,100 July - 10,089,600 off 4.9% August - 10,029,800 off 5.4% Sept. - 9,999,500 off 5.7% Oct. - 10,055,100 off 5.2%

Nov. - 10,133,900 off 4.4% Dec. - 9,955,600 off 6.1%

Hol. - 9,936,300 off 6.3%

2021

Jan. - 9,587,700 off 9.6% Feb. - 9,717,300 off 8.4% Mar. - 9,817,600 off 7.5% Apr. - 10,212,500 off 3.8%

Jan. Week 1 - 9,541,700 off 10% Jan. Week 2 - 9,560,000 off 9.9% Jan. Week 3 - 9,558,400 off 9.9% Jan. Week 4- 9,690,700 off 8.6%

Feb. Week 1 - 9,660,500 off 8.9% Feb. Week 2 - 9,776,500 off 7.8% Feb. Week 3 - 9,603,500 off 9.4% Feb. Week 4 - 9,828,900 off 7.3%

Mar. Week 1 - 9,647,900 off 9% Mar. Week 2 - 9,582,400 off 9.6% Mar. Week 3 - 9,965,900 off 6% Mar. Week 4 - 10,074,100 off 5.1%



Apr. Week 1 - 10,328,400 off 2.7% Apr. Week 2 - 10,069,400 off 5.1% Apr. Week 3 - 10,230,100 off 3.6% Apr. Week 4 - 10,222,300 off 3.7%

Riverside/San Bernardino AQH

2020

March - 128,900 April - 96,200 May - 105,000 June - 115,100 July - 108,600 off 15.7% August - 109,400 off 15.1%

Sept. - 102,100 off 20.7% Oct. - 106,000 off 17.7% Nov. - 105,600 off 18% Dec.- 108,200 off 16%

Hol. - 95,600 off 25.8%

2021

Jan. - 91,500 off 29% Feb. -101,800 off 21% Mar. - 105,800 off 17.9% Apr, - 111,300 off 13.7%

Jan. Week 1 - 88,900 off 31% Jan. Week 2 - 86,400 off 32.9% Jan. Week 3 - 85,800 off 33.4% Jan. Week 4 - 95,100 off 26.2%

Feb. Week 1 - 97,700 off 24.2% Feb. Week 2 - 98,000 off 23.9% Feb. Week 3 - 98,200 off 23.8% Feb. Week 4 - 101,900 off 20%

Mar. Week 1 - 101,600 off 21.1% Mar. Week 2 - 105,500 off 18% Mar. Week 3 - 110,400 off 14.4% Mar. Week 4 - 105,900 off 17.8%

Apr. Week 1 - 111,400 off 13.6% Apr. Week 2 - 108,300 off 15.9% Apr. Week 3 - 113,200 off 12.2% Apr. Week 4 - 112,400 off 12.8%



Riverside/San Bernardino Cume

2020

March - 2,012,400

April - 1,727,400

May - 1,846,500

June - 1,924,800

July - 1,968,100 off 2.2%

August - 1,948,500 off 3.1%

Sept. - 1,909,800 off 5%

Oct. - 1,891,200 off 6%

Nov. - 1,901,700 off 5.5%

Dec. - 1,920,900 off 4.5%

Hol. - 1,866,700 off 7.2%

2021

Jan. - 1,824,500 off 9.3%

Feb. - 1,941,100 off 3.5%

Mar. - 1,919,700 off 4.6%

Apr. - 1,948,200 off 3.2%

Jan. Week 1 - 1,831,600 off 8.9%

Jan. Week 2 - 1,792,800 off 10.9%

Jan. Week 3 - 1,790,600 off 11%

Jan. Week 4 - 1,882,900 off 6.4%

Feb. Week 1 - 1,921,500 off 4.5%

Feb. Week 2 - 1,930,300 off 4%

Feb. Week 3 - 1,945,000 off 3.3%

Feb. Week 4 - 1,967,800 off 2.2%

Mar. Week 1 - 1,903,700 off 5.4%

Mar. Week 2 - 1,876,800 off 6.7%

Mar. Week 3 - 1,930,600 off 4.1%

Mar. Week 4 - 1,967,600 off 2.2%

Apr. Week 1 - 1,935,000 off 3.8%

Apr. Week 2 - 1,919,100 off 4.6%

Apr. Week 3 - 1,960,000 off 2.6%

Apr. Week 4 - 1,978,600 off 1.7%

San Diego AQH

<u>2020</u>

March - 142,700

April - 98,000

May - 109,400



June - 120,100 July - 126,000 August - 128,500 (off 10%) Sept. - 125,000 (off 12.4%) Oct. - 126,800 (off 11.1%) Nov. - 129,300 (off 9.4%) Dec. - 124,500 (off 12.8%) Hol. - 119,700 (off 16.11%) 2021 Jan. - 114,200 (off 19.97%) Feb. - 117,700 (off 17.5%) Mar. - 119,900 (off 16.0%) Apr. - 122,000 (off 14.5%) Jan. Week 1 - 112,300 off 21.3% Jan. Week 2 - 111,500 off 21.9% Jan. Week 3 - 105,200 off 26.3% Jan. Week 4 - 112,100 off 21.4% Feb. Week 1 - 114,800 off 19.6% Feb. Week 2 - 111,800 off 21.7% Feb. Week 3 - 113,100 off 20.7% Feb. Week 4 - 113,900 off 20.2% Mar. Week 1 - 117,000 off 18.0% Mar. Week 2 - 119,000 off 16.6% Mar. Week 3 - 118,700 off 16.8% Mar. Week 4 - 124,700 off 12.6% Apr. Week 1 - 122,500 off 14.2% Apr. Week 2 - 124,000 off 13.1% Apr. Week 3 - 119,800 off 16.0% Apr. Week 4 - 121,700 off 14.7%

San Diego Cume

2020

March - 2,549,000 April - 2,133,900 May - 2,303,400 June - 2,408,600 July - 2,438,900 August - 2,418,400 (off 5.1% from March) Sept. - 2,382,700 (off 6.5%) Oct. - 2,398,000 (off 5.9%)



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Nov. - 2,361,900 (off 7.3%)
Dec. - 2,388,500 (off 6.3%)
Hol. - 2,344,600 (off 8.0%)
2021
Jan. - 2,287,800 (off 10.2%)
Feb. - 2,302,200 (off 9.7%)
Mar. - 2,314,400 (off 9.2%)
Apr. - 2,319,500 (off 9.0%)
Jan. Week 1 - 2,377,200 (off 6.7%)
Jan. Week 2 - 2,296,200 (off 9.9%)
Jan. Week 3 - 2,163,800 (off 15.1%)
Jan. Week 4 - 2,313,900 (off 9.2%)
Feb. Week 1 - 2,242,900 (off 12.0%)
Feb. Week 2 - 2,342,600 (off 8.1%)
Feb. Week 3 - 2,324,000 (off 8.8%)
Feb. Week 4 - 2,299,500 (off 9.8%)
Mar. Week 1 - 2,305,100 (off 9.6%)
Mar. Week 2 - 2,314,400 (off 9.2%)
Mar. Week 3 - 2,321,300 (off 8.9%)
Mar. Week 4 - 2,316,700 (off 9.1%)
Apr. Week 1 - 2,275,600 (off 10.7%)
Apr. Week 2 - 2,354,300 (off 7.6%)
Apr. Week 3 - 2,265,200 (off 11.1%)
Apr. Week 4 - 2,382,800 (off 6.5%)
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Now it is time to unlock the vault of learning and while you review this week's curated offerings keep this quote in mind:

"Continuous learning is the minimum requirement for success in any field." Brian Tracy

Resources and Articles of Interest to Sales and Advertisers:

IAB: Podcast Revenue Grew 19% In 2020; Ad Gains Seen Accelerating To \$2 Billion By 2023.

Inside Radio May 12, 2021

http://www.insideradio.com/podcastnewsdaily/iab-podcast-revenue-grew-19-in-2020-ad-gains-seen-accelerating-to-2-billion-by/article 68eb6aec-b345-11eb-b59f-bb441c6dc356.html

Here is the full IAB U.S. Podcast Advertising Revenue Study:

ATTACHMENT: IAB 2020 Podcast Advertising Revenue Report



From IAB Podcast Upfront A Story Of Growing Audiences, Revenue, And Advertiser Interest.

Inside Radio May 12, 2021

http://www.insideradio.com/podcastnewsdaily/from-iab-podcast-upfront-a-story-of-growing-audiences-revenue-and-advertiser-interest/article c283dff0-b343-11eb-8550-4bc8323ad94a.html

What Could Drive Podcast Subscriptions? Hint: Survey Says Most Listeners Don't Mind Ads.

Inside Radio (Cumulus/Signal Hill Insights) May 12, 2021

http://www.insideradio.com/podcastnewsdaily/what-could-drive-podcast-subscriptions-hint-survey-says-most-listeners-don-t-mind-ads/article 5df29578-b342-11eb-8c63-131f5a3359c1.html

Top Podcast Advertisers' Quarterly Spend? Half A Million.

Inside Radio May 11, 2021

http://www.insideradio.com/podcastnewsdaily/top-podcast-advertisers-quarterly-spend-half-amillion/article b389506a-b277-11eb-aa9b-0bd4d266ceb2.html

Not All Latinx Are The Same: Embrace Diversity Within This Community

MediaPost May 5, 2021

https://www.mediapost.com/publications/article/363015/not-all-latinx-are-the-same-embrace-diversity-wit.html?utm_source=newsletter&utm_medium=email&utm_content=readmore&utm_campaign=122324&has hid=nPO6kNh8ToCb2_NBH4Mycg

How in-car advertising fuels retail growth

ANA (Waze Sponsored Ads) May 11, 2021

(Important Heads Up - This is Waze sponsored content but there is a lot of good sourced material in it that you can "borrow" and easily apply to in-car radio advertising)

https://www.waze.com/ads/article/stay-the-

course/?utm source=SmartBrief&utm medium=Paid Email&utm campaign=Marketing Headline

Here is the full presentation:

ATTACHMENT: Waze Ads Stay The Course

Automaker TV Spending Increases 148% Year-Over-Year

MediaPost May 10, 2021

https://www.mediapost.com/publications/article/363138/automaker-tv-spending-increases-148-year-over-yea.html?utm_source=newsletter&utm_medium=email&utm_content=readmore&utm_campaign=122326&has hid=Xbl3-p0DS1exdHSa15Xu_g

2022 Political Ad Planning is Underway

SalesFuel May 11, 2021

https://salesfuel.com/2022-political-ad-planning-is-underway/

Uber Using Radio To Recruit Drivers For Uber Eats.

Inside Radio (Media Monitors) May 11, 2021

http://www.insideradio.com/free/uber-using-radio-to-recruit-drivers-for-uber-eats/article_c7daa440-b21f-11eb-ad48-83d8ce28e030.html



Magellan AI Podcast Advertising Quarterly Benchmark Report for Q1 2021

ATTACHMENT: Magellan Al Q1 2021 Podcast Ad Report

Retailers optimistic about strong recovery in 2021

Chain Store Age May 10, 2021

https://chainstoreage.com/retailers-optimistic-about-strong-recovery-

2021?oly_enc_id=8319H4585489H7M&utm_source=omeda&utm_medium=email&utm_campaign=NL_CSA+Da y+Breaker&utm_keyword=

Up Next, The Podcast Pitching Podcasts To Ad Buyers, Goes Live.

Inside Radio (Up Next) May 10, 2021

http://www.insideradio.com/podcastnewsdaily/up-next-the-podcast-pitching-podcasts-to-ad-buyers-goes-live/article 717e81d8-b1b2-11eb-8e81-1f243dcfbbef.html

Spring TV Ad-Sales Season Expected to Show Rebound From 2020, More Spending on Streaming Ad-supported streaming services are set to attract more advertising dollars as marketers face limited supply of commercials on broadcast and cable channels

WSJ May 7, 2021

https://www.wsj.com/articles/spring-tv-ad-sales-season-expected-to-show-rebound-from-2020-more-spending-on-streaming-11620381600

For Radio Listeners During COVID, 2020 Was the Year of the Stream.

Inside Radio (Jacobs Media) May 10, 2021

http://www.insideradio.com/free/for-radio-listeners-during-covid-2020-was-the-year-of-the-stream/article 71f614f0-b158-11eb-ae57-df0e41baa605.html

Radio's COVID Era Strengths: Emotional Connection, Personalities, Local Focus.

Inside Radio (Jacobs Media Strategies) May 7, 2021

 $\frac{http://www.insideradio.com/free/radios-covid-era-strengths-emotional-connection-personalities-local-focus/article 9dd735a4-af00-11eb-a20c-b3fbc27bc1b9.html$

Note: The previous two articles in Inside Radio feature reviews of portions of the Jacobs Media Strategies' TECHSURVEY 2021 that was released late last week. Here is a copy of the Executive Summary deck:

ATTACHMENT: Jacobs Media TechSurvey 2020

Monthly impulse spending jumps 51% year-over-year

Chain Store Age May 7, 2021

https://chainstoreage.com/monthly-impulse-spending-jumps-51-year-over-

year?oly enc id=8319H4585489H7M&utm source=omeda&utm medium=email&utm campaign=NL CSA+Day
+Breaker&utm keyword=



Mastercard: April retail sales up 23.3%; trends indicate recovering economy Restaurant sector posts second straight month of growth

Chain Store Age May 6, 2021

https://chainstoreage.com/mastercard-april-retail-sales-233-trends-indicate-recoveringeconomy?oly_enc_id=8319H4585489H7M&utm_source=omeda&utm_medium=email&utm_campaign=NL_CSA +Day+Breaker&utm_keyword=

You Are Not in The Radio Business

Radio Ink (Randy Lane) May 9, 2021

https://radioink.com/2021/05/09/you-are-not-in-the-radio-business/?vgo ee=g4MdIIvetgiR1mkR7kijJ4BI1h38V58Ke8bVrp%2FmcsM%3D

How to Increase Your Sales Volume This Year

SalesFuel May 8, 2021

https://salesfuel.com/how-to-increase-your-sales-volume-this-year/

Five Buying Decisions EVERY Buyer Makes

SalesFuel May 8, 2021

https://salesfuel.com/five-buying-decisions-every-buyer-makes/

Digital Audio And Podcasting Expanding Their Reach Among Moms Says New Edison Study.

Inside Radio (Edison Research) May 7, 2021

http://www.insideradio.com/podcastnewsdaily/digital-audio-and-podcasting-expanding-their-reach-among-moms-says-new-edison-study/article_cbc4ab24-af53-11eb-b850-cb2a9034c399.html

Don't Forget to Grow Your Accounts!

Engage April 30, 2021

https://www.engageselling.com/blog/dont-forget-to-grow-your-accounts/

Why the Best Question Is the One You Never Ask

The Black Swan Group May 3, 2021

https://blog.blackswanltd.com/the-edge/why-the-best-question-is-the-one-you-never-ask

Discover Whether You're a Sales Hunter, Farmer, or Trapper

BlogSpot April 27, 2021

https://blog.hubspot.com/sales/sales-hunter-farmer-

<u>trapper?</u> hstc=201195441.1a2963a9d1dd576753980fbe6c5d29cc.1612388323114.1620240819709.162084898 9907.30& hssc=201195441.1.1620848989907& hsfp=3162083856

Mobile Advertisers Flock To Podcasting And Digital Audio In A Soon-To-Be Cookie-Less Ad World.

Inside Radio May 6, 2021

http://www.insideradio.com/podcastnewsdaily/mobile-advertisers-flock-to-podcasting-and-digital-audio-in-a-soon-to-be-cookie-less/article c72d1480-ae8a-11eb-92ca-dbb5ce8cdad2.html



RESOURCES AND ARTICLES OF INTEREST TO MANAGERS FOR PLANNING AND FORECASTING:

Study: Broadcasters Lose Almost \$2 Billion Annually to Google, Facebook

Broadcasting+Cable May 10, 2021

https://www.nexttv.com/news/study-broadcasters-lose-almost-dollar2-billion-annually-to-google-facebook

Nielsen Undercounted Viewing, According to Media Rating Council Changes in panel maintenance led to 2% to 6% lower use of TV by 18-49 year olds

Broadcasting+Cable May 10, 2021

https://www.nexttv.com/news/nielsen-undercounted-viewing-according-to-media-rating-council

How Nielsen Undercount Revelations Will Affect The Upfront

Broadcasting+Cable May 11, 2021

https://www.nexttv.com/news/how-nielsen-undercount-revelations-will-affect-the-upfront

Contradicting Nielsen, Comscore Says TV Use Didn't Fall in Pandemic More pressure due on Nielsen from VAB

Broadcasting+Cable May 10, 2021

https://www.nexttv.com/news/contradicting-nielsen-comscore-says-tv-use-didnt-fall-in-pandemic

Why Declining PUMM Levels Keep Me Up At Night

Radio Ink (Buzz Knight) May 12, 2021

https://radioink.com/2021/05/12/why-declining-pumm-levels-keep-me-up-at-night/?vgo_ee=g4MdIIvetgiR1mkR7kijJ4BI1h38V58Ke8bVrp%2FmcsM%3D

Taking It To The Streets: Live Station Events Are Making Their Safe Return.

Inside Radio May 11, 2021

http://www.insideradio.com/free/taking-it-to-the-streets-live-station-events-are-making-their-safe-return/article e7d75792-b220-11eb-b7a5-9b01c2d7f10d.html

Radio Jockeys For Larger Piece Of Exploding Sports Gambling Ad Pie.

Inside Radio (Nielsen) May 11, 2021

(Note: This article contains follow-up information to the BIA-Nielsen webinar on this subject that I sent our to everyone a couple of weeks ago) http://www.insideradio.com/free/radio-jockeys-for-larger-piece-of-exploding-sports-gambling-ad-pie/article a770cd5a-b220-11eb-82c2-4334c145b8a9.html

GroupM Introduces the Media Inclusion Initiative

MediaPost May 10, 2021

https://www.mediapost.com/publications/article/363135/groupm-introduces-the-media-inclusion-initiative.html

The Marketing and Advertising Agency Report 2021

Navigating Pressures and Seizing Opportunities Through a Pandemic and Beyond

eMarketer May 10, 2021

https://www.emarketer.com/content/marketing-advertising-agency-report-2021?ecid=NL1001



Will This Decade Be the New Roaring '20s?

ANA May 6, 2021

https://www.ana.net/magazines/show/id/forward-2021-05-effectv-will-this-decade-be-new-roaring-twenties?st3=210510mkg360amnon&utm_source=informz&utm_medium=email&utm_campaign=210510-marketing360-am-non& zs=FANij1& zl=qDHd7

3 Key Differences Between Your Radio Station's Desktop Website and Mobile Website

Jacobs Media Strategies April 12, 2021 (republish)

https://jacobsmedia.com/3-key-difference-between-your-radio-stations-desktop-website-and-mobile-website/?utm_source=Jacobs+Media+Strategies+Blog&utm_campaign=05640b1e76-CTD EmailOnly&utm_medium=email&utm_term=0_5007ff924d-05640b1e76-179898762

FCC Proposes Eight Percent Hike In Annual Regulatory Fees For Radio Stations.

Inside Radio May 10, 2021

http://www.insideradio.com/free/fcc-proposes-eight-percent-hike-in-annual-regulatory-fees-for-radio-stations/article_ef55b2a8-ae32-11eb-a61a-1f5b2c91d724.html

Motivating Listeners to Act in 2021

ANA May 8, 2021 (RAB April 7, 2021)

https://www.ana.net/blogs/show/id/mm-blog-2021-04-rab-motivating-listeners-to-act?st3=210508saturdaynon&utm_source=informz&utm_medium=email&utm_campaign=210508-whatshappening-non& zs=FANij1& zl=elFd7

State Broadcast Associations Unite To Fight Performance Royalty.

Inside Radio May 7, 2021

http://www.insideradio.com/free/state-broadcast-associations-unite-to-fight-performance-royalty/article 51a2fa1c-af76-11eb-be61-0f8d659d30c6.html

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Miles W. Sexton President Southern California Broadcasters Association 805.701.0031