

FEBRUARY 17, 2021

January is now in the books from an audience measurement standpoint and I am happy to report that the metrics in our PPM markets show some recovery from the past several weeks. Let's hope this bounce is off the bottom.

While it is good to see the improvement, it wasn't enough to save the full month of January which shows decline from the Holiday book which is unusual. Interestingly, this same downward trend that we see in January was not the case in most of the diary markets we looked at which had only minor (low single digits) declines if any. This is almost certainly the result of the different measurement methodologies. Actual listening vs recalled listening will always favor the diary markets.

We won't know until we see several more weeks of trending if this problem will persist. We may see some significant improvement when the PPM markets open up as the pandemic eases and driving/in car listening levels improve. Regardless, I believe we are seeing a significant shift in how people will access audio listening. Audio is growing and our distribution of our audio products is becoming more diversified. However, measurement (Nielsen) is not keeping up with the pace of this change.

I encourage you all to read the article Fred Jacobs in the Management section below entitled **Why Broadcast Listening Is Down, But Streaming Is Up** which addresses this critical issue.

Here is the summary data for our PPM markets for the full month of January as well as January Week 5:

Los Angeles AQH

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%
Jan 21- 541,600 off 21.8%

NOTE: THIS IS FROM TAPSCAN INCLUDES THE METHODOLOGY CHANGES

Dec. Week 1 - 587,600 (off 15.1% from March)
Dec. Week 2 - 580,600 off 16.1%
Dec. Week 3 - 608,200 off 12%
Dec. Week 4 - 541,300 off 21.8% (Thanksgiving Week 11/26-12/2)

Hol. Week 1 - 578,600 off 16.4%
Hol. Week 2 - 562,800 off 18.7%
Hol. Week 3 - 588,700 off 15%
Hol. Week 4 - 498,500 off 28%
Hol. Week 5 - 485,300 off 29.9%

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%

NOTE: THE NOVEMBER AND LATER AQH WEEKLIES ABOVE ARE FROM PPM ANALYSIS TOOL AND DO NOT REFLECT THE METHODOLOGY CHANGES. THIS WILL CHANGE IN JANUARY.

Los Angeles Cume

March - 10,611,300
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%
Jan. - 9,587,700 off 9.6%

Dec. Week 1 - 9,880,500 (off 6.8% from March)
Dec. Week 2 - 9,866,500 off 7%
Dec. Week 3 - 10,080,100 off 5%
Dec. Week 4 - 9,995,200 off 5.8%

Hol. Week 1 - 10,013,700 off 5.6%
Hol. Week 2 - 9,887,200 off 6.8%
Hol. Week 3 - 10,153,500 off 4.3%
Hol. Week 4 - 10,055,800 off 5.2%
Hol. Week 5 - 9,571,400 off 9.7%

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%

Riverside/San Bernardino AQH

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%
Jan. - 91,500 off 29%

NOTE: THIS IS FROM TAPSCAN AND INCLUDES THE METHODOLOGY CHANGES.

Dec. Week 1 - 105,400 (off 18.2% from March)
Dec. Week 2 - 108,500 off 15.8%
Dec. Week 3 - 109,200 off 15.2%
Dec. Week 4 - 94,200 off 26.9% (Thanksgiving Week 11/26-12/2)

Hol. Week 1 - 98,200 off 23.8%
Hol. Week 2 - 97,800 off 24.1%
Hol. Week 3 - 100,500 off 22%
Hol. Week 4 - 82,500 off 35.9%
Hol. Week 5- 84,700 off 34.2%

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%

NOTE: THE NOVEMBER AND LATER AQH WEEKLIES ABOVE ARE FROM PPM ANALYSIS TOOL AND DO NOT REFLECT THE METHODOLOGY CHANGES. THIS WILL CHANGE IN JANUARY.

Riverside/San Bernardino Cume

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%
Jan. - 1,824,500 off 9.3%

Dec. Week 1 - 1,870,000 (off 7% from March)
Dec. Week 2 - 1,933,600 off 3.9%
Dec. Week 3 - 1,968,300 off 2.2%
Dec. Week 4 - 1,911,700 off 5%

Hol. Week 1 - 1,886,700 off 6.2%
Hol. Week 2 - 1,870,000 off 7%
Hol. Week 3 - 1,895,100 off 5.8%
Hol. Week 4 - 1,854,600 off 7.8%
Hol. Week 5 - 1,827,000 off 9.2%

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%

San Diego AQH

March - 142,700
April - 98,000
May - 109,400
June - 120,100
July - 126,000
August - 128,500 (off 10% from March)
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%)
Jan. - 114,200 (off 19.97% from March)

NOTE: THIS IS FROM TAPSCAN AND INCLUDES THE METHODOLOGY CHANGES

Dec. Week 1 - 118,500 (off 17.0% from March)
Dec. Week 2 - 123,500 off 13.5%
Dec. Week 3 - 124,900 off 12.5%
Dec. Week 4 - 110,300 off 22.7% (Thanksgiving Week 11/26-12/2)

Hol. Week 1 - 120,300 off 15.7%
Hol. Week 2 - 120,500 off 15.5%
Hol. Week 3 - 122,400 off 14.2%
Hol. Week 4 - 100,700 off 29.4%
Hol. Week 5 - 109,900 off 23.0%

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%

NOTE: THE NOVEMBER AND LATER AQH WEEKLIES ABOVE ARE FROM PPM ANALYSIS TOOL AND DO NOT REFLECT THE METHODOLOGY CHANGES. THIS WILL CHANGE IN JANUARY.

San Diego Cume

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%)
Nov. - 2,361,900 (off 7.3%)
Dec. - 2,388,500 (off 6.3%)
Hol. - 2,344,600 (off 8.0%)
Jan. - 2,287,800 (off 10.2%)

Dec. Week 1 - 2,295,700 (off 9.9% from March)
Dec. Week 2 - 2,430,700 (off 4.6%)
Dec. Week 3 - 2,448,900 (off 3.9%)
Dec. Week 4 - 2,378,500 (off 6.7%)

Hol. Week 1 - 2,414,800 (off 5.3%)
Hol. Week 2 - 2,375,900 (off 6.7%)
Hol. Week 3 - 2,387,800 (off 6.3%)
Hol. Week 4 - 2,311,800 (off 9.3%)
Hol, Week 5 - 2,232,700 (off 12.4%)

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%)

Now onto your curated list of resources and articles covering the most important topics in our business:

RESOURCES AND ARTICLES OF INTEREST TO SALES AND ADVERTISERS:

Meet The Digital Audio Ad Buyer: Deep Pockets, Above-Average Marketing Experience.

Inside Radio February 17, 2021

http://www.insideradio.com/free/meet-the-digital-audio-ad-buyer-deep-pockets-above-average-marketing-experience/article_98cd0610-70ee-11eb-b147-236acc212719.html

The 2021 Retail Outlook (RetailMeNot Infographic)

eMarketer February 17, 2021

ATTACHMENT: [The Retail Me Not 2021 Retail Outlook](#)

Brand marketers stick to trust-building strategies forged in 2020's fires, study finds

Marketing Dive February 17, 2021

<https://www.marketingdive.com/news/brand-marketers-stick-to-trust-building-strategies-forged-in-2020s-fires/595099/>

Why Data Has Become Indispensable Throughout The Sales Process.

Inside Radio February 16, 2021

http://www.insideradio.com/free/why-data-has-become-indispensable-throughout-the-sales-process/article_ec42385e-7028-11eb-b847-07f8152877a6.html

Progressive: The Spot Radio Powerhouse

Radio + Television Business Report February 16, 2021

<https://www.rbr.com/mm-spot10-r-021621/>

Consumer sentiment unexpectedly falls in February

Chain Store Age February 12, 2021

https://chainstoreage.com/consumer-sentiment-unexpectedly-falls-february?oly_enc_id=8319H4585489H7M&utm_source=omeda&utm_medium=email&utm_campaign=NL_CSA+Day+Breaker&utm_keyword=

Retail sales to rise 8.1% in 2021, according to CGP forecast

Chain Store Age February 11, 2021

https://chainstoreage.com/retail-sales-rise-81-2021-according-cgp-forecast?oly_enc_id=8319H4585489H7M&utm_source=omeda&utm_medium=email&utm_campaign=NL_CSA+Day+Breaker&utm_keyword=

Dealer Forward: Personalizing Engagement – Everywhere

CBT News February 15, 2021

(Note: When you read this remember the importance of dealer promotion of their website url in radio their radio advertising)

<https://www.cbtnews.com/dealer-forward-personalizing-engagement-everywhere/>

Encouraging Sellers Part I

Radio Ink (Lloyd Ford) February 15, 2021

https://radioink.com/2021/02/15/encouraging-sellers-part-i/?vgo_ee=g4MdlIvetgiR1mkR7kijJ4BI1h38V58Ke8bVrp%2FmcsM%3D

Here's Why Auto Industry Recovery is Likely to Lose Steam

Yahoo Finance February 11, 2021

<https://finance.yahoo.com/news/heres-why-auto-industry-recovery-140802346.html>

News/Talk Surges To Record High, CHR Shrinks In Full Year 2020 Ratings.

Inside Radio (Nielsen) February 12, 2021

http://www.insideradio.com/free/news-talk-surges-to-record-high-chr-shrinks-in-full-year-2020-ratings/article_cb62b406-6d0d-11eb-806b-93e86cbc474b.html

'A shift toward direct influencer and brand collaborations': How the DTC podcast advertising strategy changed in 2020

ModernRetail February 10, 2021

<https://www.modernretail.co/startups/how-the-dtc-podcast-advertising-strategy-changed-in-2020/>

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

Morphin' Radio

Radio Ink February 16, 2021

https://radioink.com/2021/02/16/morphin-radio/?vgo_ee=g4MdlIvetgiR1mkR7kijJ4BI1h38V58Ke8bVrp%2FmcsM%3D

Improving Sales Performance | Media Sales Report | Sales Department Structure: Size and Compensation

The Center for Sales Strategy February 17, 2021

https://blog.thecenterforsalesstrategy.com/sales-department-structure-size-and-compensation?utm_campaign=subscriber&utm_medium=email&_hsmi=111573389&_hsenc=p2ANqtz-Ct4bsfZeS3DfEq26nwD1mHAYZwJZsWQBBERCuueccm7Md01I1BO6tmYG_hkFM5Aj7d9-g5eCJ1a43tk1bLByA6TY_Jvg&utm_content=111573389&utm_source=hs_email

Hunter vs Farmer Personality, Characteristics, and More

Center For Sales Strategy February 15, 2021

https://blog.thecenterforsalesstrategy.com/hunter-vs-farmer-personality-characteristics-and-more?utm_campaign=subscriber&utm_medium=email&_hsmi=111211950&_hsenc=p2ANqtz-9GsJW53eVFWFkHxKFDFQslppFLZ-OMxegeGEjofeFEAm-K5aK1bJdPBBXH544LvNfJEJADoOYaHilEegGJglw0LSfNpw&utm_content=111211950&utm_source=hs_email

Ecommerce Spending Continued To Climb In January

Digital Advertising News February 10, 2021

https://insights.digitalmediasolutions.com/articles/ecommerce-growth-january?utm_campaign=DMS%20Insights%20Weekly%20Newsletter&utm_medium=email&_hsmi=111456102&_hsenc=p2ANqtz--Ue3NxCXc4PNW-EMwjs7PyyfXx7zPCOVrQ2ePm3WkZmDYicTOa8lu2hy2BEic_Y7WUNdH58acnrqzoqE-f4CcZ90r-g&utm_content=111456102&utm_source=hs_email

Predictions for a New (Partnership) World Order

ANA January 28, 2021

https://www.ana.net/blogs/show/id/mm-blog-2021-01-predictions-for-a-new-world-order?st3=210216mktg360non&utm_source=informz&utm_medium=email&utm_campaign=210216mktg360non&zs=FANij1&zl=kpwP7

More Radio Stations Produce Podcasts, But Survey Finds Many Are Still Figuring How It Fits In.

Inside Radio February 16, 2021

http://www.insideradio.com/podcastnewsdaily/more-radio-stations-produce-podcasts-but-survey-finds-many-are-still-figuring-how-it-fits/article_d58393b6-707c-11eb-982d-632955c67e80.html

Why Broadcast Listening Is Down, But Streaming Is Up

Jacobs Media Strategies (Fred Jacobs) February 15, 2021

<https://jacobsmedia.com/our-listening-is-down-but-our-streaming-is-up/>

NEXTGEN TV In Cars? 'Ideal for Solid Reception' While On the Go

Radio + Television Business Report February 16, 2021

<https://www.rbr.com/nextgen-tv-in-cars-ideal-for-solid-reception-while-on-the-go/>

The Return of the Fairness Doctrine – What it Was and Why it Won't Return

Broadcast Law Blog (David Oxenford) February 11, 2021

(Just a sidebar note: the elimination of the Fairness Doctrine and the equal time requirement is what allowed for the growth of Talk Radio and gave new life to AM radio.)

<https://www.broadcastlawblog.com/2021/02/articles/the-return-of-the-fairness-doctrine-what-it-was-and-why-it-wont-return/>

As Podcasts Continue To Grow In Popularity, Ad Dollars Follow

Forbes February 11, 2021

<https://www.forbes.com/sites/bradadgate/2021/02/11/podcasting-has-become-a-big-business/?sh=52ccd3f42cfb>

The impressive resilience of digital audio

eMarketer February 16, 2021

<https://www.emarketer.com/content/impressive-resilience-of-digital-audio?cid=NL1001>

EPISODE 41: Can 'Radio' Survive the Future? We Worry, But RAB's Erica Farber Sees Metamorphosis

Borrell Podcasts February 16, 2021

<https://local-marketing-trends.simplecast.com/episodes/episode-41-can-radio-survive-the-future-we-worry-but-rabs-erica-farber-sees-metamorphosis>

An agile marketing plan is essential to long term customer success

ClickZ Marketing Technology Transformation February 16, 2021

<https://www.clickz.com/an-agile-marketing-plan-is-essential-to-long-term-customer-success/265004/>

Top Performing Clusters Booked Millions In Digital Revenue. What's It Take?

Inside Radio February 16, 2021

http://www.insideradio.com/free/top-performing-clusters-booked-millions-in-digital-revenue-what-s-it-take/article_612b00de-7028-11eb-96e6-dbae1e1f58ff.html

12 Strategies to Grow Your Ratings

Radio Ink (Gary Berkowitz) February 16, 2021

https://radioink.com/2021/02/16/12-strategies-to-grow-your-ratings/?vgo_ee=g4MdllvetgiR1mkR7kijJ4BI1h38V58Ke8bVrp%2FmcsM%3D

How to Effectively Train New Sales Managers

SalesFuel February 13, 2021

<https://salesfuel.com/how-to-effectively-train-new-sales-managers/>

3 Easy Tips for Managing Your Inbox

SalesFuel February 13, 2021

<https://salesfuel.com/3-easy-tips-for-managing-your-inbox/>

TVB Wants Nielsen To Slow Broadband-Only Homes Inclusion In Local TV Ratings

MediaPost February 11, 2021

<https://www.mediapost.com/publications/article/360495/tvb-wants-nielsen-to-slow-broadband-only-homes-inc.html>

Keeping up with the commercials: Why post-pandemic TV ad spending won't waver

eMarketer February 5, 2021

<https://www.emarketer.com/content/keeping-up-with-commercials-why-post-pandemic-tv-ad-spending-won-t-waver?ecid=NL1001>

Borrell: When Ad Spigot Opens In 2021, Digital Strategy Will Be Paramount.

Inside Radio (Borrell) February 11, 2021

http://www.insideradio.com/free/borrell-when-ad-spigot-opens-in-2021-digital-strategy-will-be-paramount/article_e4582bea-6c4e-11eb-925b-7ff6f8496b71.html

--

Miles W. Sexton

President

Southern California Broadcasters Association

805.701.0031