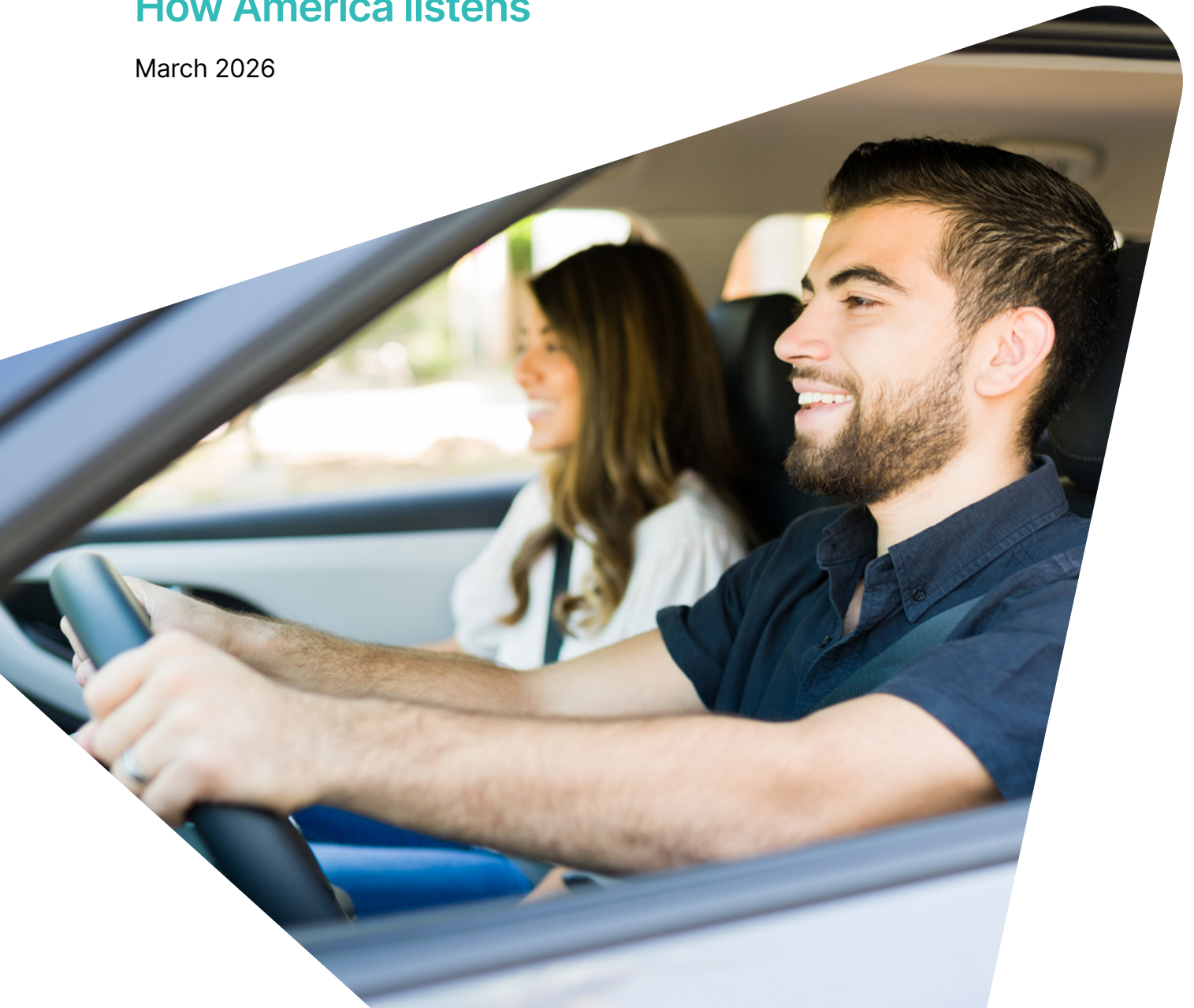


Client report

Audio today 2026

How America listens

March 2026



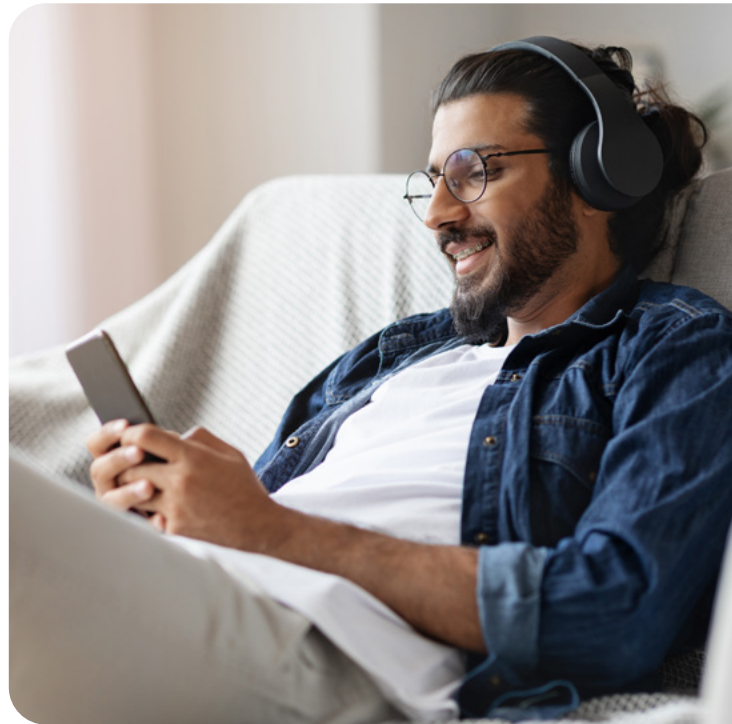
Introduction

In the era of constant digital scrolling and fragmented attention, it's easy for marketers to be lured by the “new and next.” We often prioritize platforms based on how easily we can track a click, sometimes forgetting that **ease of measurement doesn't always equal effectiveness**. While digital channels dominate the conversation, there is a legacy powerhouse that continues to outperform nearly every other medium in the one metric that matters most: **actual human reach**.

The reality is that radio is the undisputed leader in ad supported audio time. Whether it's the morning commute or the workday grind, radio is a daily habit for millions, reaching consumers when they are **out of the home and closest to the point of purchase**. In fact, for advertisers looking to capture the attention of drivers, the data is clear—more than **80% of all ad supported audio time in vehicles** belongs to AM/FM radio.

This isn't just about legacy; it's about a massive, diverse audience that spans every demographic. From **93% of all U.S. adults** to an even higher **93% of Black and 94% of Hispanic consumers**, radio's monthly reach is nearly universal. Even among the elusive 18-34 demographic, radio reaches **89% of the population**. When you layer in the rising power of podcasts, you aren't just adding a line item—you're building a comprehensive audio strategy that achieves **nearly 100% coverage**.

Despite this, a “perception gap” persists. Many marketers rank radio at the bottom for perceived effectiveness, yet Nielsen's Global Compass data reveals it actually delivers **some of the highest ROI globally**, trailing only social media. By underinvesting in radio, brands are missing out on a highly efficient channel that consistently overdelivers.

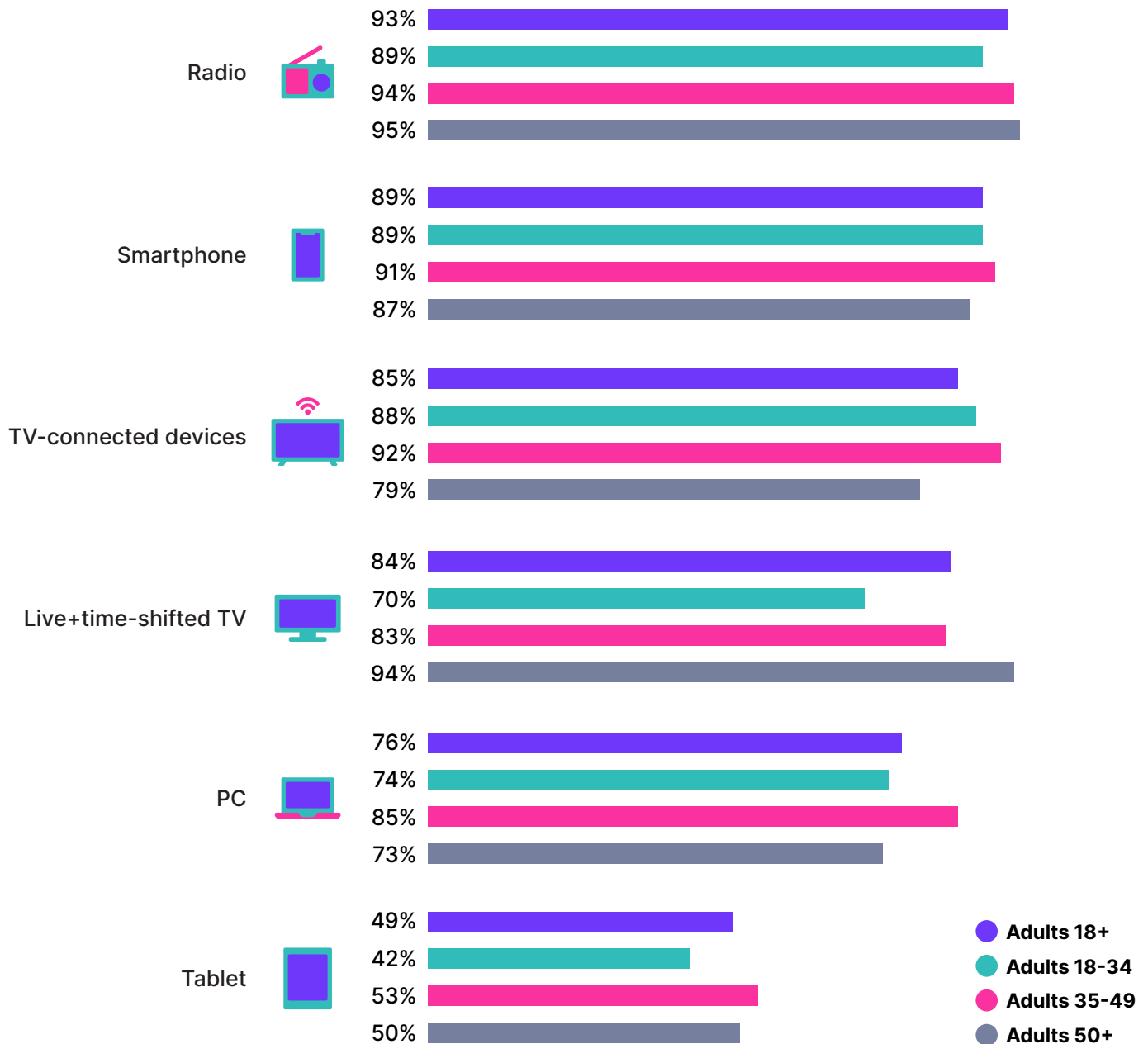


Radio reaches the most consumers of any platform, delivers significant ROI and is far more effective than many marketers perceive.

Comparing monthly reach

U.S. monthly reach

Percent of population



Source: Nielsen Audience Insights Data - Q3 2025 (Nielsen NPOWER, Nielsen Media Impact)



Year after year, radio continues to reach more American consumers than any other platform, linear or digital.



Monthly reach % among U.S. population

	Black 18+	Black 18-34	Black 35-49	Black 50+
Radio	93%	90%	95%	95%
Smartphone	88%	87%	90%	86%
TV-connected devices	87%	90%	91%	83%
Live+time-shifted TV	87%	75%	86%	96%
PC	72%	71%	82%	66%
Tablet	47%	40%	52%	49%

	Hispanic 18+	Hispanic 18-34	Hispanic 35-49	Hispanic 50+
Radio	94%	92%	95%	96%
Smartphone	86%	86%	89%	84%
TV-connected devices	87%	88%	91%	82%
Live+time-shifted TV	79%	68%	81%	91%
PC	66%	64%	77%	59%
Tablet	45%	40%	50%	47%

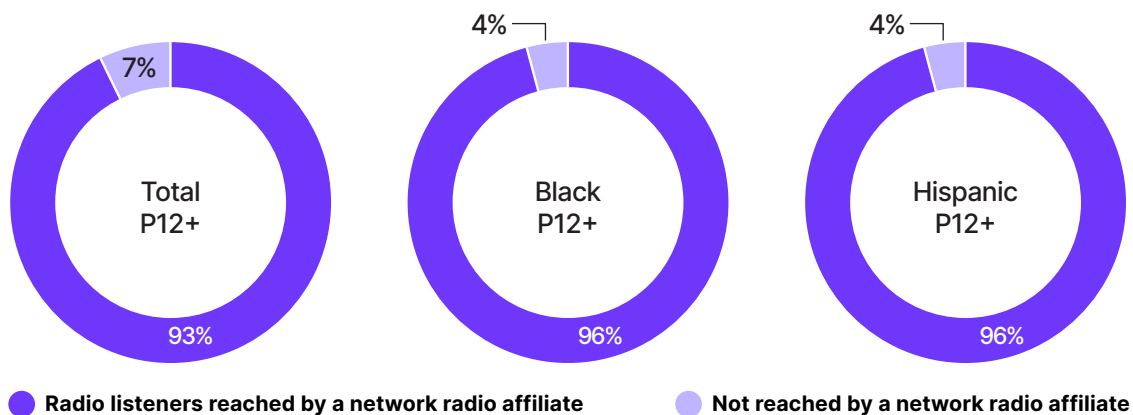
Nielsen Audience Insights Data - Q3 2025 (Nielsen NPOWER, Nielsen Media Impact)

Network radio reaches a wide variety of Americans

Network programming and services include a large and diverse catalog of syndicated audio content from 24-hour music channels to sports talk and political analysis, as well as some of the biggest personalities in radio.

Network radio 'affiliates' are radio stations who carry this nationally syndicated content. The reach and influence of network radio is immense, encompassing thousands and thousands of stations which carry network content at some point during the week.

More than 93% of radio listeners tune to a network-affiliated station every week



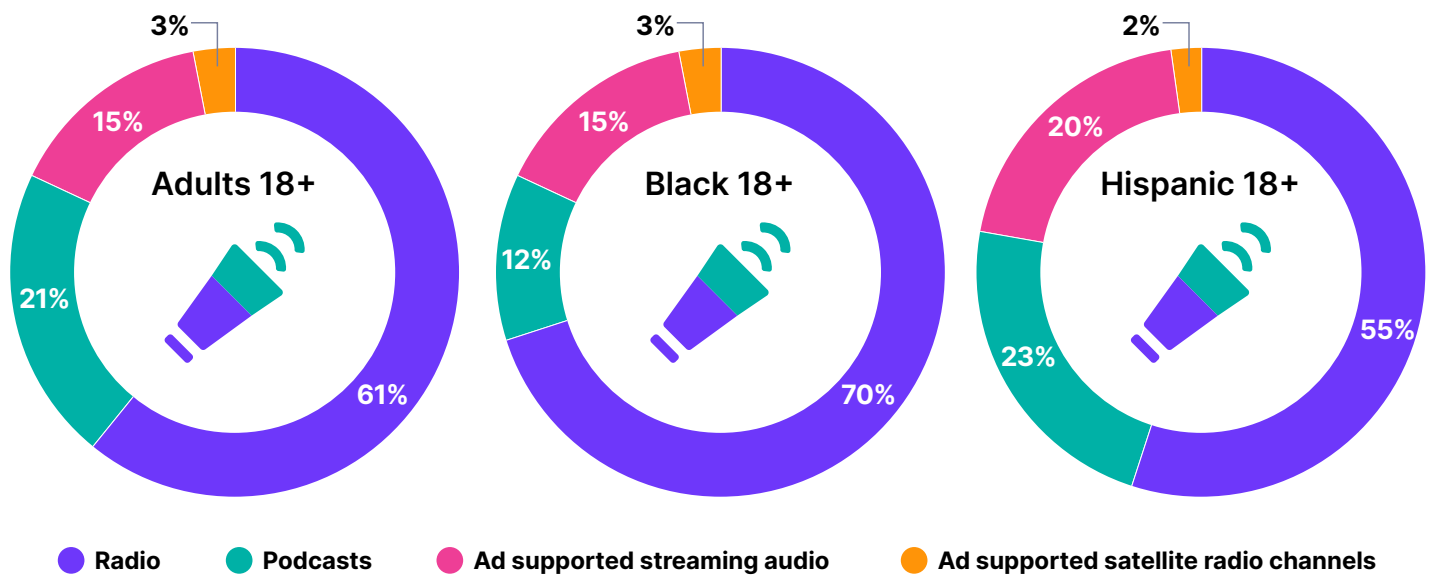
Source: Nielsen Audio National Regional Database (NRD), Spring 2025, Mon-Sun 5am-12mid, Weekly Cume composition based on NRD Total US PUR and DST Metro PUR, Affiliate lists dated July/August 2025

Radio is the undisputed leader in ad supported audio time

In the fourth quarter of 2025, ad supported audio accounted for 63% of all listening. Radio commands the majority of daily ad supported listening. **For advertisers planning audio marketing campaigns, it is critical to understand that more than 80% of ALL daily ad supported audio time goes to radio and podcasts, while only 15% goes to streaming music.**

Edison Research Share of Ear

% daily ad supported audio listening time



Source: Edison Research, 'Share of Ear' Q4 2025

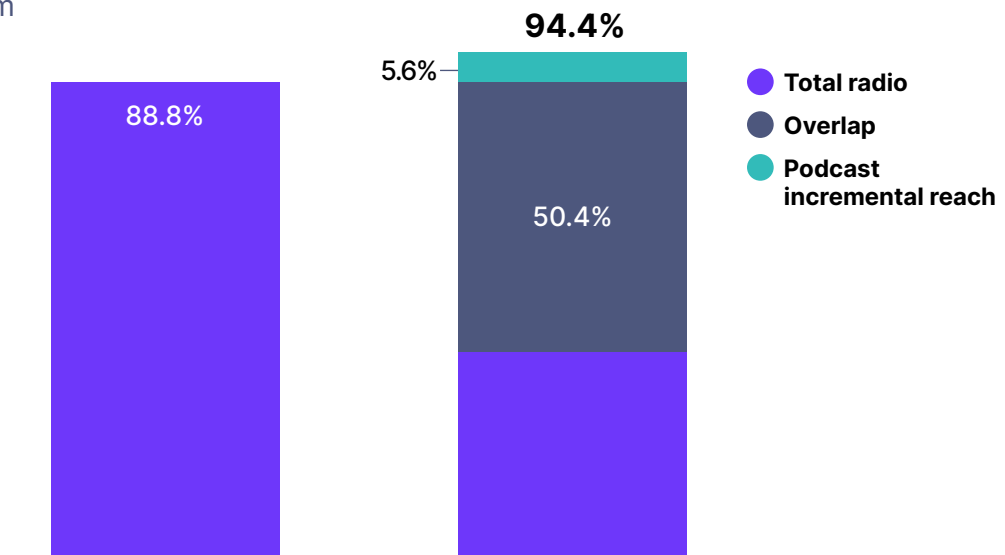


Planning for audio marketing campaigns needs to include radio AND podcasts to effectively reach younger audiences

Based on the findings from Edison's Share of Ear – 77% of all daily ad supported audio time among consumers aged 18-34 goes to radio and podcasts alone – advertisers now have the ability to optimize their audio marketing strategy. Nielsen Media Impact unlocks the ability to plan on podcasts, utilizing Edison's Podcast Metrics data.

Total Reach Build (Radio Base) - Persons 18-34

Total Reach % by Platform



Source: Nielsen Podcast Fusion | NMI; Adults 18-34; March 2025

As America's #1 reach medium, radio provides a comprehensive foundation for any audio marketing strategy - reaching 89% of 18-34 consumers alone. Layering in podcasting - with a shared audience of over 50% - adds another five points of incremental reach and brings the coverage to nearly 100%.

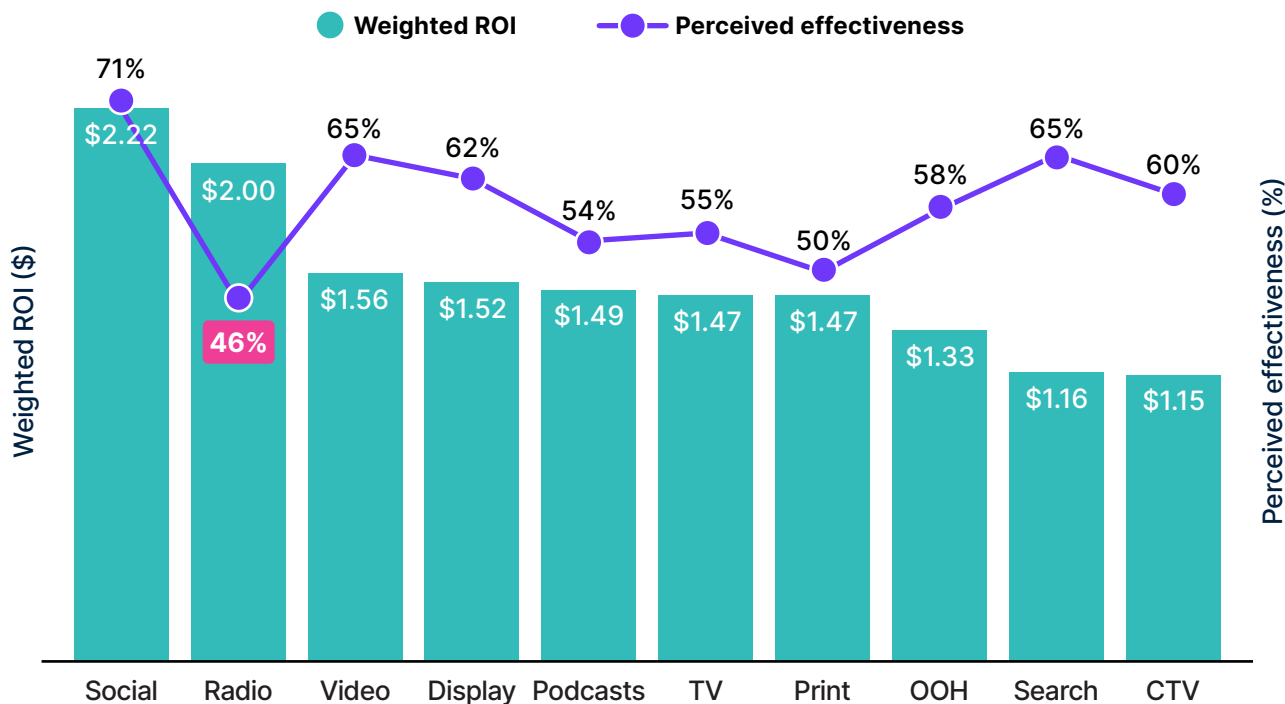
Maximizing marketing with data-driven decision making, and radio

Nielsen's 2025 Annual Marketing Report found that marketers are driving increased investments in digital channels, which they see as more effective. Digital channels are taking precedence due to their perceived measurability and direct attribution. However, ease of measurement does not always equate to effectiveness or higher ROI.

Proprietary KPIs and lower CPMs can be misleading, and a channel's ability to claim conversion credit doesn't necessarily translate to real value. This bias can lead to underinvestment in traditional channels, like radio, which, despite being perceived as less effective, can deliver substantial ROI.

Nielsen's Global Compass data provides a powerful counterpoint to marketer perceptions. While marketers rank radio last in perceived effectiveness, it actually boasts some of the highest ROI globally, just trailing social media. This suggests that marketers are missing out on a highly effective channel due to inaccurate perceptions. Similarly, podcasts demonstrate strong ROI, comparable to TV and digital display, yet they are often overlooked or undervalued. These insights highlight a critical misalignment between perception and performance, which can lead to costly mistakes in media planning.

Perceived effectiveness does not match reality



Sources: 2025 Nielsen Global Annual Marketing Survey; Nielsen Global Compass Benchmark

Unlocking the potential of radio in marketing mix models



Dave Hohman

EVP Demand Side Media
Nielsen

Fall 2024

In today's complex media landscape, marketers are constantly seeking ways to optimize their media strategies and understand which channels are driving return on investment (ROI). Generally, television, digital, and social media receive the lion's share of attention (and spend). Many marketers believe that audio, including radio, is difficult to measure in marketing mix models (MMM) because of its relatively lower spend. Nielsen MMM captures and reports audio. In analyzing thousands of campaigns we can confirm that when sufficient impressions are run, audio is measurable, and shows up quite well in MMM; of course as with any tactic, some brands/categories perform stronger than others.

For guidance on how best to have any media type represented, Nielsen suggests looking at the size of the budget, the quality of the inputs and the granularity of the outlet. Example: for audio, this would include considering radio, streaming audio, and podcasts.

Here are some best practices to consider for your audio channels—radio, streaming audio, and podcasting:

- **Plan for adequate GRPs:** Allocate sufficient budget to radio and other audio channels. While the appropriate levels may vary by category
- **Use as-run data, not planned GRPs:** Many marketers rely on planned GRPs, which can differ significantly from what is actually delivered. By using As-Run GRPs—actual media delivery—you'll get a more accurate read of radio's performance. Nielsen's data consistently shows the importance of this distinction.
- **DMA-level delivery matters:** Radio's effectiveness can vary across different markets, so it's important to evaluate media delivery at the designated market area (DMA) level. Actual delivery often deviates from planned delivery, and understanding these variations can provide valuable insights for optimizing your radio campaigns.
- **Analyze by week:** Timing is everything, especially for media like radio that may have seasonality or other timing-related nuances. Analyzing media delivery on a weekly basis—taking into account sales events, weather conditions, or special promotions—can help explain spikes or dips in performance. This granular level of analysis is crucial for understanding the true impact of your radio investments.

Radio use spans the bulk of the day, reaching consumers on the path to purchase; it is the *dominant* ad supported audio source in the car.

A daily habit for millions, radio is a particularly effective medium for advertisers due to its legacy of reaching listeners during the prime hours of the day while they are out of home and closest to the point of purchase (commuting, working, shopping). Furthermore, radio is far and away the top audio source in the car. More than 80% of all ad supported audio time in vehicles goes to AM/FM radio as of the Q4 2025 Edison Share of Ear study.

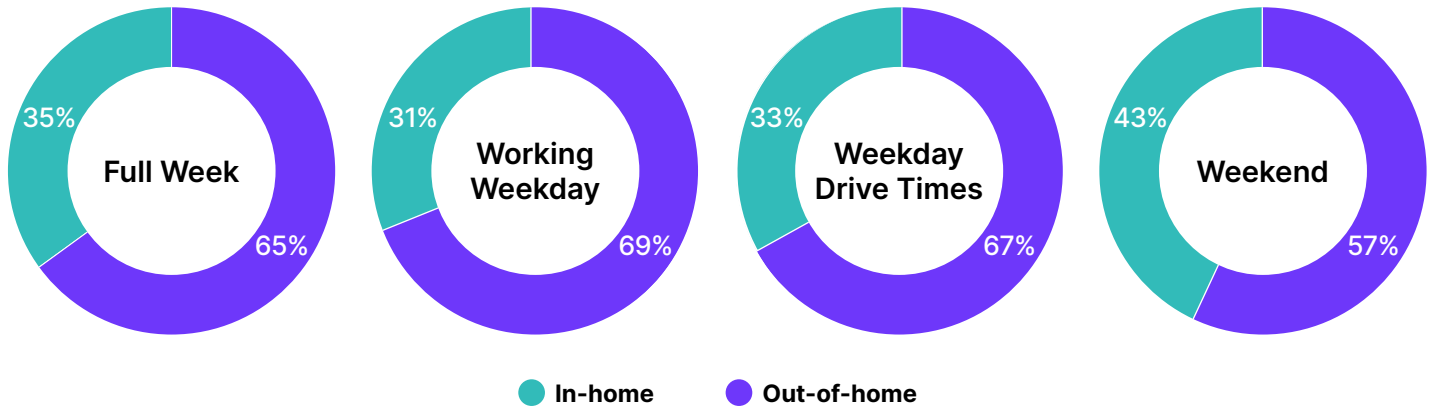


Nearly three-quarters (74%) of all out-of-home radio use during morning and afternoon drive happens in the car.





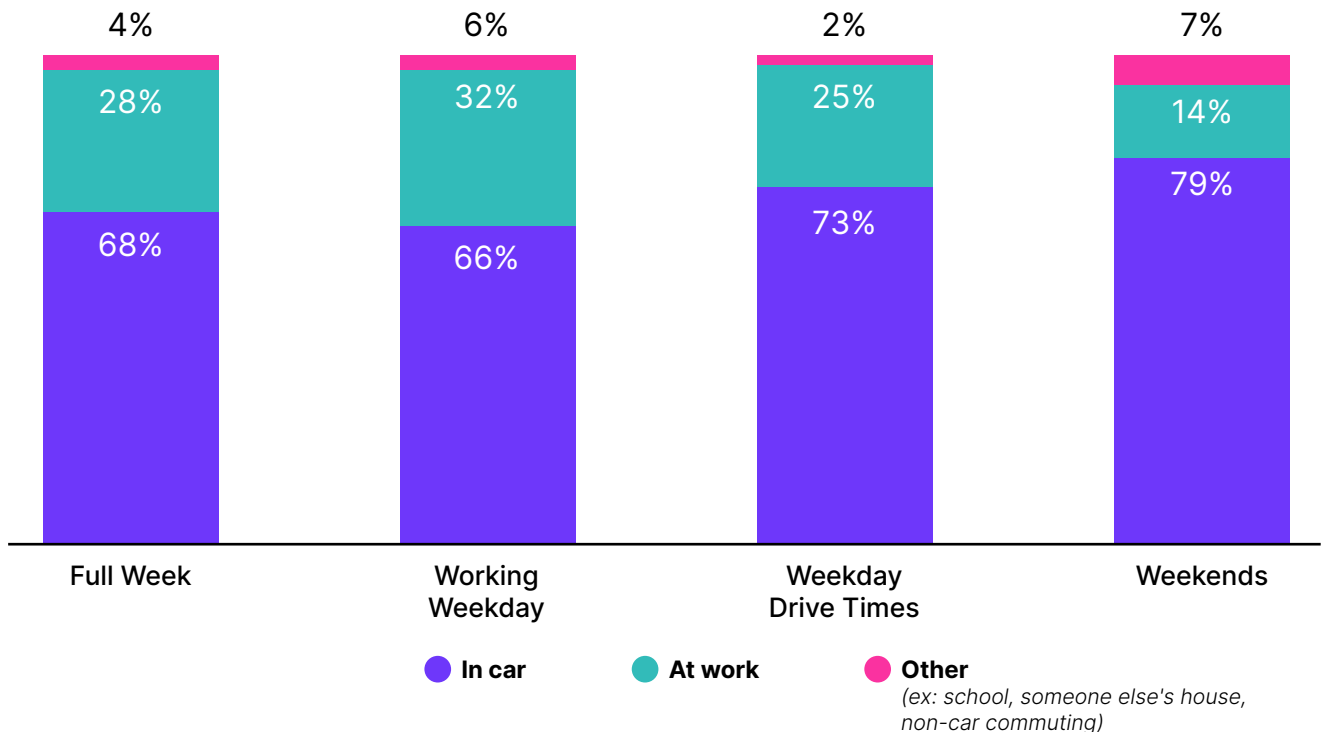
Consumers use radio when they're away from home



Source: Nielsen National Regional Database, Adults 18+ - Q2 2025

Most away-from-home listening happens in the car

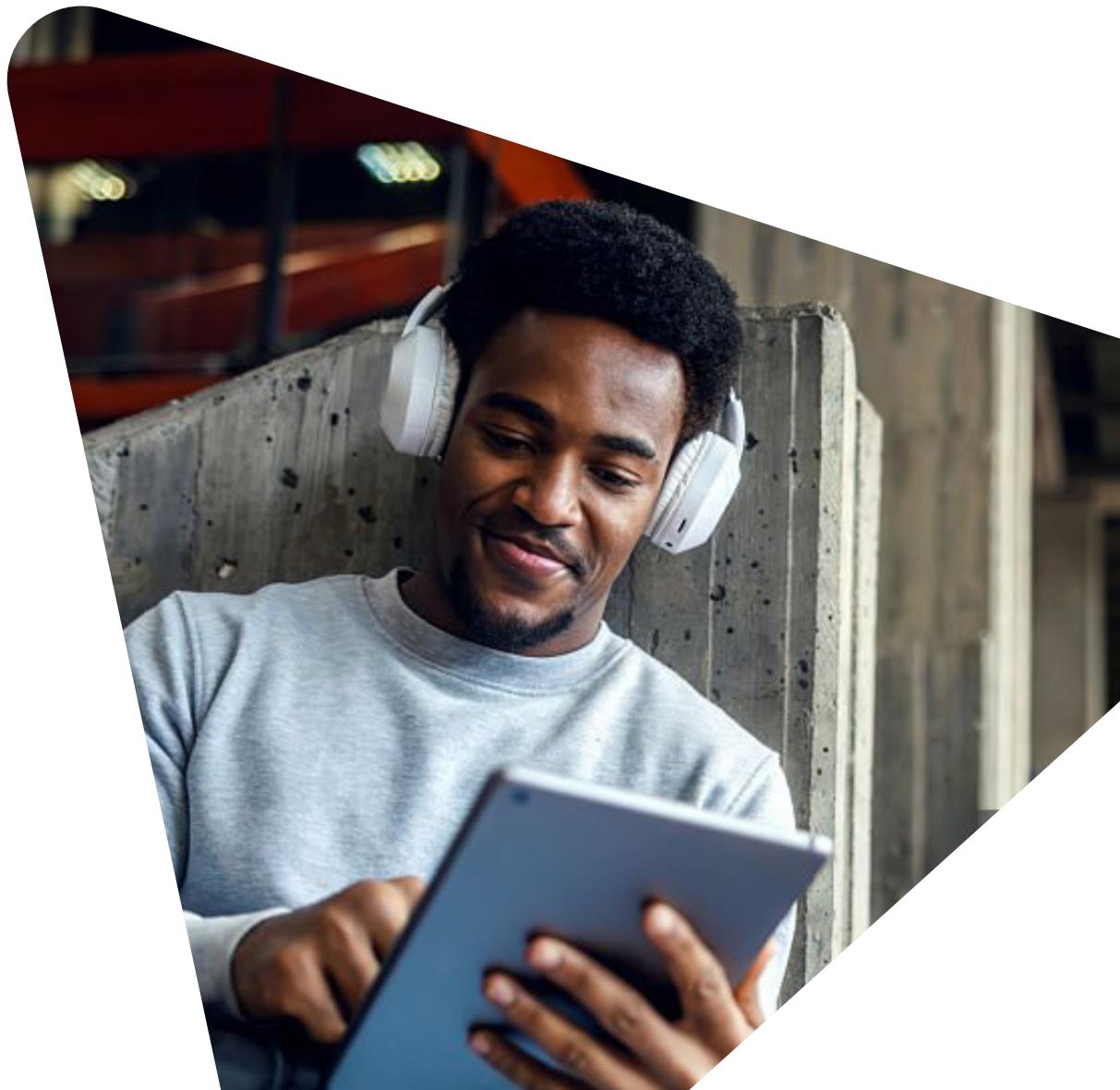
Percent of all out-of-home listening, by location



Source: Nielsen National Regional Database, Adults 18+, Audio Diary markets only - Q2 2025


Appendix

The following pages detail the monthly reach of radio and top formats among key audience groups.



Monthly radio reach and top formats

Adults 18+




Monthly reach (000)
241,917
93% of population

Top 3 formats (audience share)

1	Country	13.8%
2	News/Talk	12.3%
3	AC	7.5%

Adults 18-34




Monthly reach (000)
64,500
89% of population

Top 3 formats (audience share)

1	Country	16.8%
2	Pop CHR	10.7%
3	AC	7.2%

Black 18+




Monthly reach (000)
31,801
93% of population

Top 3 formats (audience share)

1	Urban AC R&B	31.1%
2	Urban Contemporary Hip-Hop/R&B	19.1%
3	Rhythmic CHR	5.6%

Black Adults 18-34



Monthly reach (000)
9,509
90% of population

Top 3 formats (audience share)

1	Urban Contemporary Hip-Hop/R&B	28.9%
2	Urban AC R&B	20.5%
3	Rhythmic CHR	8.8%

Hispanic 18+




Monthly reach (000)
43,546
94% of population

Top 3 formats (audience share)

1	Mexican Regional	14.9%
2	Spanish Contemporary + Spanish Hot AC	10.1%
3	AC	7.5%

Hispanic Adults 18-34



Monthly reach (000)
15,505
92% of population


Top 3 formats (audience share)

1	Mexican Regional	12.3%
2	Pop CHR	9.6%
3	Spanish Contemporary + Spanish Hot AC	9.1%

Source: Nielsen Media Impact Q3 2025 + Nielsen National Regional Database Q4 2024 & Q2 2025. M-Su 12M-12M.
AC stands for Adult Contemporary | CHR stands for Contemporary Hit Radio

Monthly radio reach and top formats (continued)

Adults 18-49




Monthly reach (000)
124,076
91% of population

Top 3 formats (audience share)

1	Country	13.8%
2	Pop CHR	9.1%
3	AC	8.4%

Adults 25-54




Monthly reach (000)
116,862
93% of population

Top 3 formats (audience share)

1	Country	14.4%
2	Classic Rock	8.1%
3	Pop CHR	7.4%

Black Adults 18-49




Monthly reach (000)
17,935
92% of population

Top 3 formats (audience share)

1	Urban Contemporary Hip-Hop/R&B	28.0%
2	Urban AC R&B	23.6%
3	Rhythmic CHR	8.0%

Black Adults 25-54




Monthly reach (000)
16,813
94% of population

Top 3 formats (audience share)

1	Urban Contemporary Hip-Hop/R&B	26.2%
2	Urban AC R&B	25.9%
3	Rhythmic CHR	7.3%

Hispanic Adults 18-49




Monthly reach (000)
28,518
93% of population

Top 3 formats (audience share)

1	Mexican Regional	15.5%
2	Spanish Contemporary + Spanish Hot AC	10.2%
3	Rhythmic CHR	7.6%

Hispanic Adults 25-54



Monthly reach (000)
25,432
95% of population

Top 3 formats (audience share)

1	Mexican Regional	16.3%
2	Spanish Contemporary + Spanish Hot AC	10.4%
3	AC	7.1%

Source: Nielsen Media Impact Q3 2025 + Nielsen National Regional Database Q4 2024 & Q2 2025. M-Su 12M-12M.
AC stands for Adult Contemporary | CHR stands for Contemporary Hit Radio

About Nielsen

Nielsen shapes the world's media and content as a global leader in audience measurement, data and analytics. Through our understanding of people and their behaviors across all channels and platforms, we empower our clients with independent and actionable intelligence so they can connect and engage with their audiences—now and into the future. Nielsen operates around the world in more than 55 countries. Learn more at www.nielsen.com and connect with us on social media.

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