



PPM 3-minute Qualifier Debut

Jan/Feb 2025 Monthly

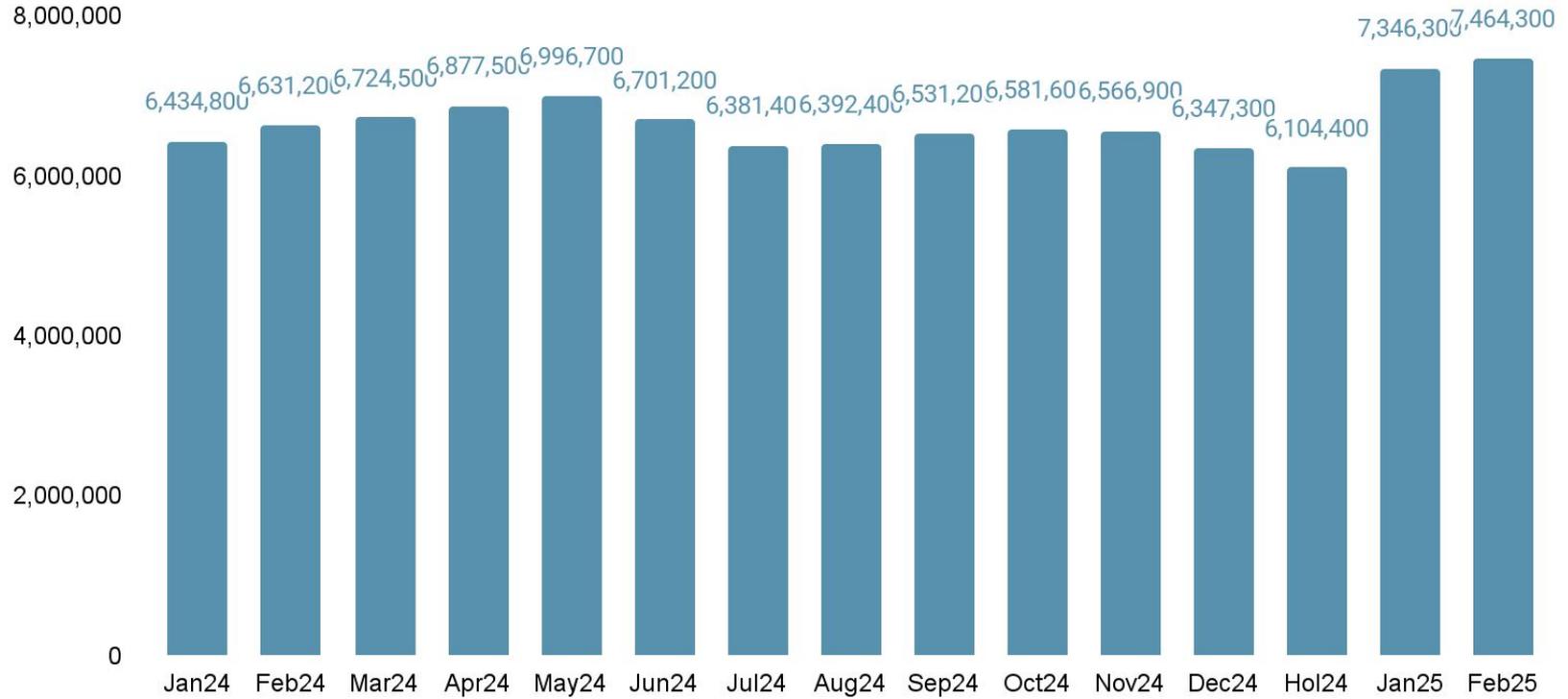
*Service-level data based on January/February 2025, 45
non-embedded PPM markets (Houston metro) M-S 6a-12m.*

Key Findings From First Months of 3MQ

- Jan/Feb audience levels are now the **highest since 2022**
- Results in range of expectations once you factor in seasonality & attrition
- Daily cume increases are seen at a station level; these drive AQH
- Time spent listening increases are easier to see at the service level, as more minutes are being captured
- Markets w larger increases are primarily western; 2024 levels are a factor
- So far, there is growth in average audience across all dayparts; evenly distributed
- Results will vary by individual station & market

Trending PPM Average Audience Levels

Persons 6+ AQH PUMM - Full Week



Source: PPM Metro Market Totals (45 non-embedded markets). Persons 6+, Mon-Sun 6a-Mid. Market Total AQH Persons (PUMM)

Historical radio use trends in PPM...seasonality

Market	Report Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Hol.
All PPM Market Average	2011													
All PPM Market Average	2012													
All PPM Market Average	2013													
All PPM Market Average	2014													
All PPM Market Average	2015													
All PPM Market Average	2016													
All PPM Market Average	2017													
All PPM Market Average	2018													
All PPM Market Average	2019													
All PPM Market Average	2020													
All PPM Market Average	2021													
All PPM Market Average	2022													
All PPM Market Average	2023													
All PPM Market Average	2024													
All PPM Market Average	2025													

Source: PPM Metro Market Totals (48). Persons 12+, Mon-Sun 6a-Mid. Market Total AQH Rating

Tracking Jan/Feb trends since 2020

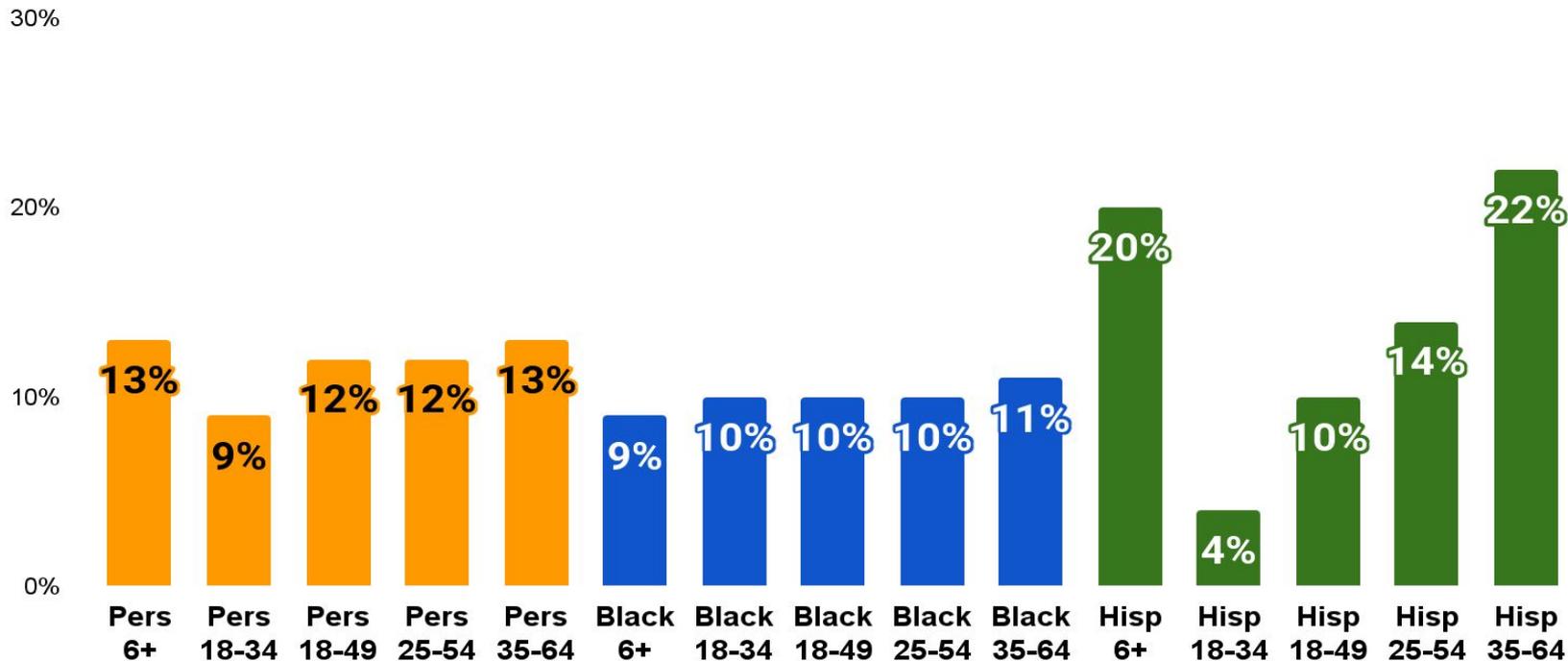
Persons 6+ AQH PUMM - Full Week

2 Book Avg	Jan/Feb 2020	Jan/Feb 2021	Jan/Feb 2022	Jan/Feb 2023	Jan/Feb 2024	Jan/Feb 2025
PUMM	9,344,650	7,260,350	7,420,500	7,138,550	6,533,000	7,405,300
YoY % change		-22%	+2%	-4%	-8%	+13%

Source: PPM Metro Market Totals (45 non-embedded markets). Persons 6+, Mon-Sun 6a-Mid. Jan-Feb AVG Market Total AQH Persons (PUMM), YoY comparison

Average increase year-over-year for Jan/Feb

Jan/Feb 2025 vs Jan/Feb 2024 - total listening (PUMM)



Nielsen PPM Markets (45 non-embedded metro markets|43 Black DST markets|42 Hispanic DST markets). Jan/Feb25 vs Jan/Feb24 Mon-Sun 6a-Mid.

Average increases by daypart

Jan/Feb25 vs Jan/Feb24 PPM Markets - total listening (PUMM)

	Full Week	AM Drive	Mid Day	PM Drive	Weekend 6a-7p
Pers 6+	13%	13%	12%	13%	13%
Pers 18-34	9%	9%	6%	8%	7%
Pers 25-54	12%	12%	9%	11%	11%
Pers 35-64	13%	12%	11%	13%	13%

Nielsen PPM Markets (45 non-embedded metro markets|43 Black DST markets|42 Hispanic DST markets). Jan/Feb25 vs Jan/Feb24.

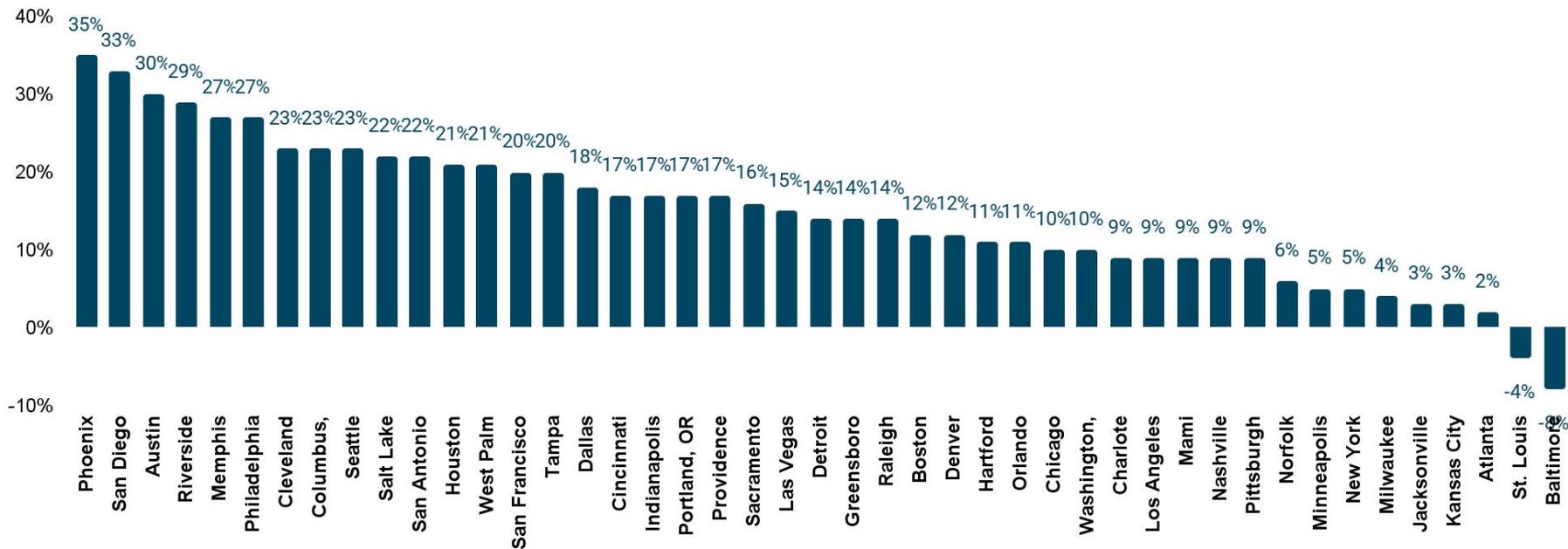
Average increases by daypart cont.

Jan/Feb25 vs Jan/Feb24 PPM Markets - total listening (PUMM)

	Full Week	AM Drive	Mid Day	PM Drive	Weekend 6a-7p
Black 6+	9%	12%	9%	8%	9%
Black 18-34	10%	13%	10%	11%	11%
Black 25-54	10%	14%	7%	6%	10%
Black 35-64	11%	13%	9%	8%	14%
Hisp 6+	20%	21%	21%	21%	20%
Hisp 18-34	4%	6%	3%	4%	1%
Hisp 25-54	14%	16%	14%	14%	13%
Hisp 35-64	22%	22%	23%	23%	22%

Average increase in AQH by market

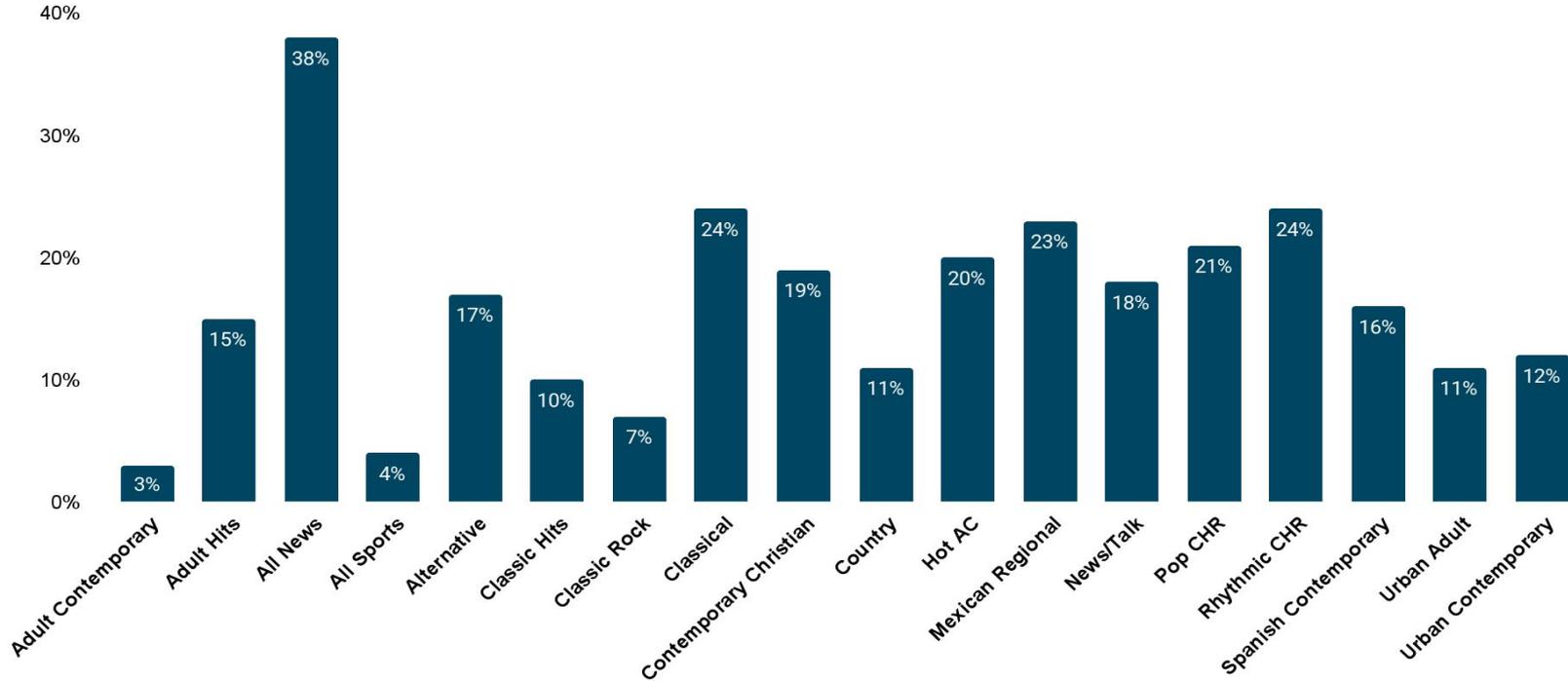
Jan/Feb25 vs Jan/Feb24 PPM markets (P6+) - total market listening



Nielsen PPM Markets (48). Jan/Feb25 vs Jan/Feb24 Mon-Sun 6a-Mid.

Average increase in AQH by format

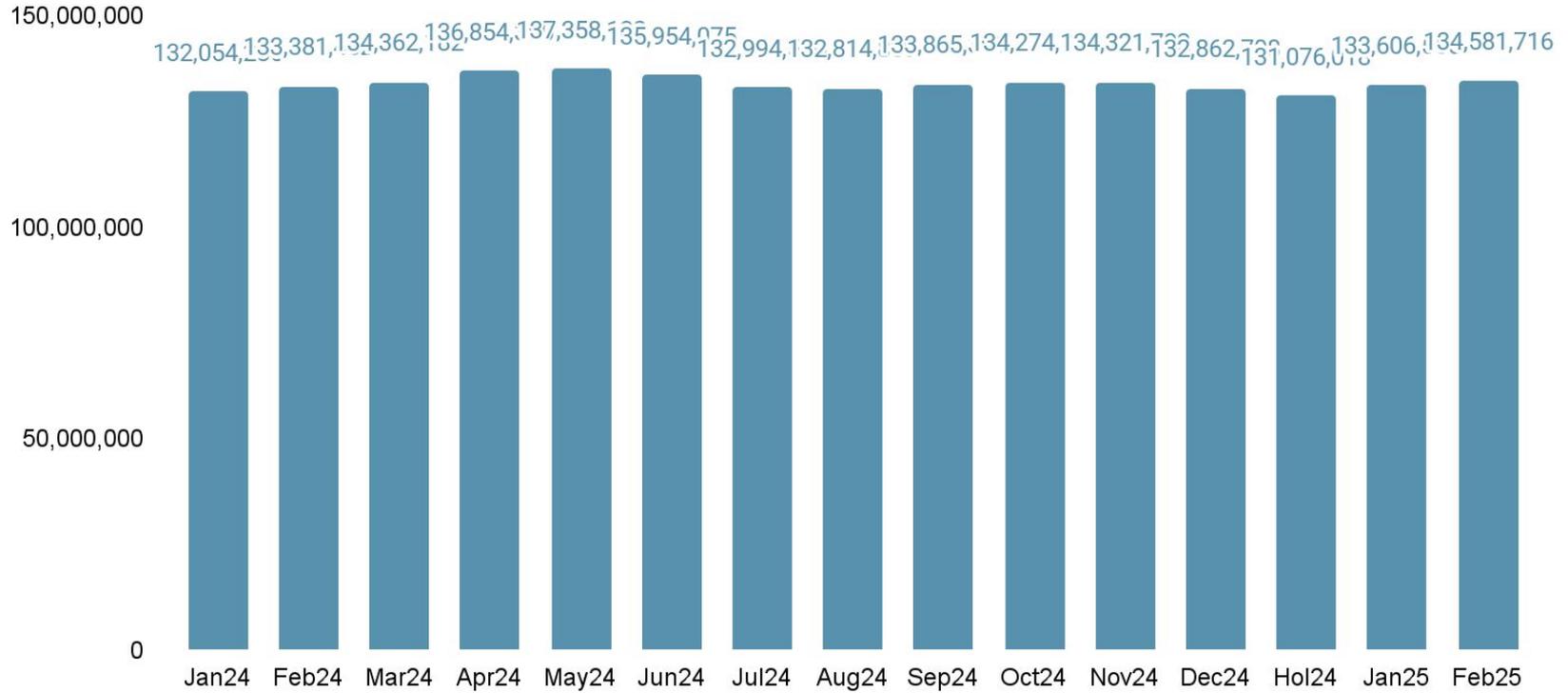
Jan/Feb25 vs Jan/Feb24 PPM markets (P6+) - total market listening



Nielsen PPM Markets (48). Jan/Feb25 vs Jan/Feb24 Mon-Sun 6a-Mid.

Trending PPM Reach Levels

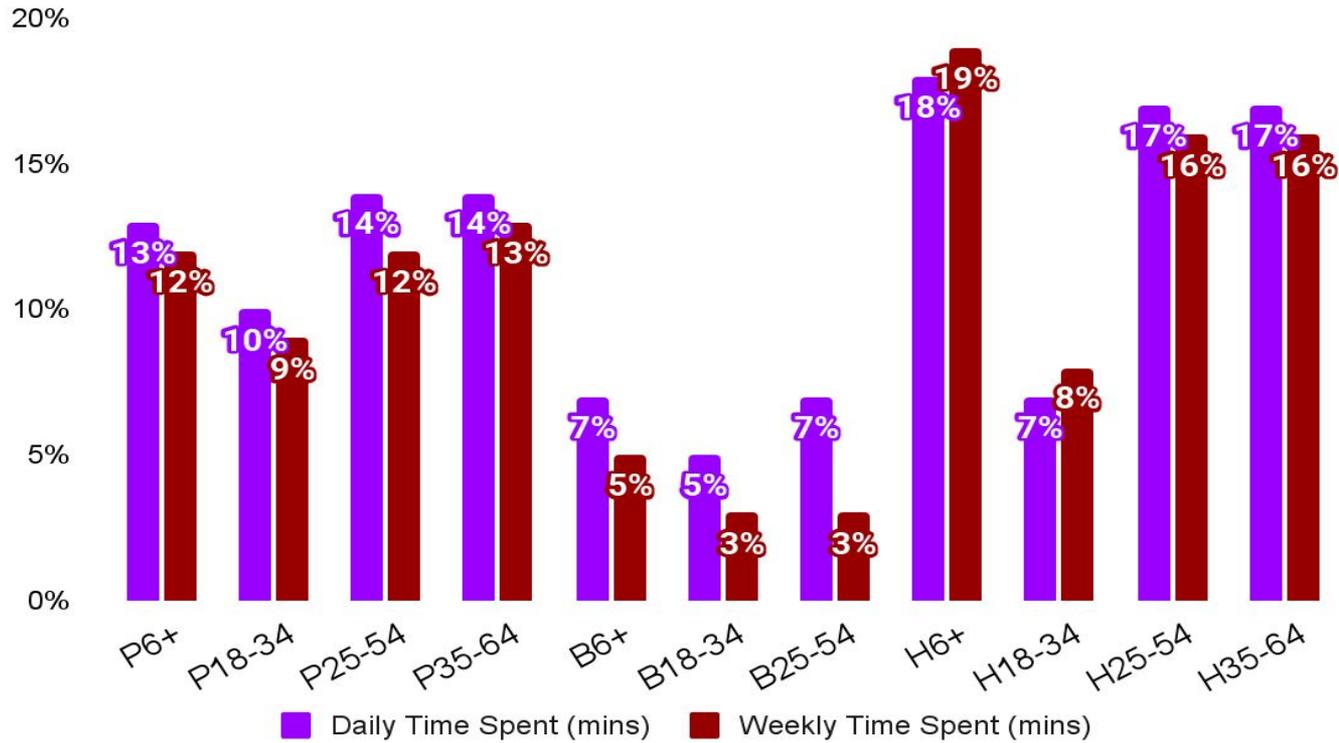
Persons 6+ Monthly Reach - Full Week



Source: PPM Metro Market Totals (45 non-embedded markets). Persons 6+, Mon-Sun 6a-Mid. Market Total Monthly Reach

At the service level, time spent increased significantly

Jan/Feb25 vs Jan/Feb24 PPM Markets - total listening



Nielsen PPM Markets (45 non-embedded metro markets|43 Black DST markets|42 Hispanic DST markets). Jan/Feb25 vs Jan/Feb24 Mon-Sun 6a-Mid.

Reach increases are seen at the station level - daily cume

Persons 25-54, select PPM markets (5): *Sum of top 10 stations ranked on Feb25*

Daypart	Oct-Nov-Dec24	Nov-Dec24-Jan25	Dec24-Jan-Feb25	% increase Oct-Nov-Dec to Dec-Jan-Feb
AM Drive (Mon-Fri)	1,852,000	1,919,400	2,005,200	+8%
Mid Day (Mon-Fri)	1,900,300	1,978,600	2,020,200	+6%
PM Drive (Mon-Fri)	2,111,900	2,186,300	2,240,100	+6%

Source: Miami, Milwaukee, New York, Sacramento, St. Louis PPM Markets. Persons 25-54, multiple dayparts. 3-book average comparisons (Oct-Nov-Dec24; Nov24-Dec24-Jan25; Dec24-Jan25-Feb25). Top 10 stations ranked on Feb25.

Daily cume & AQH are directly correlated

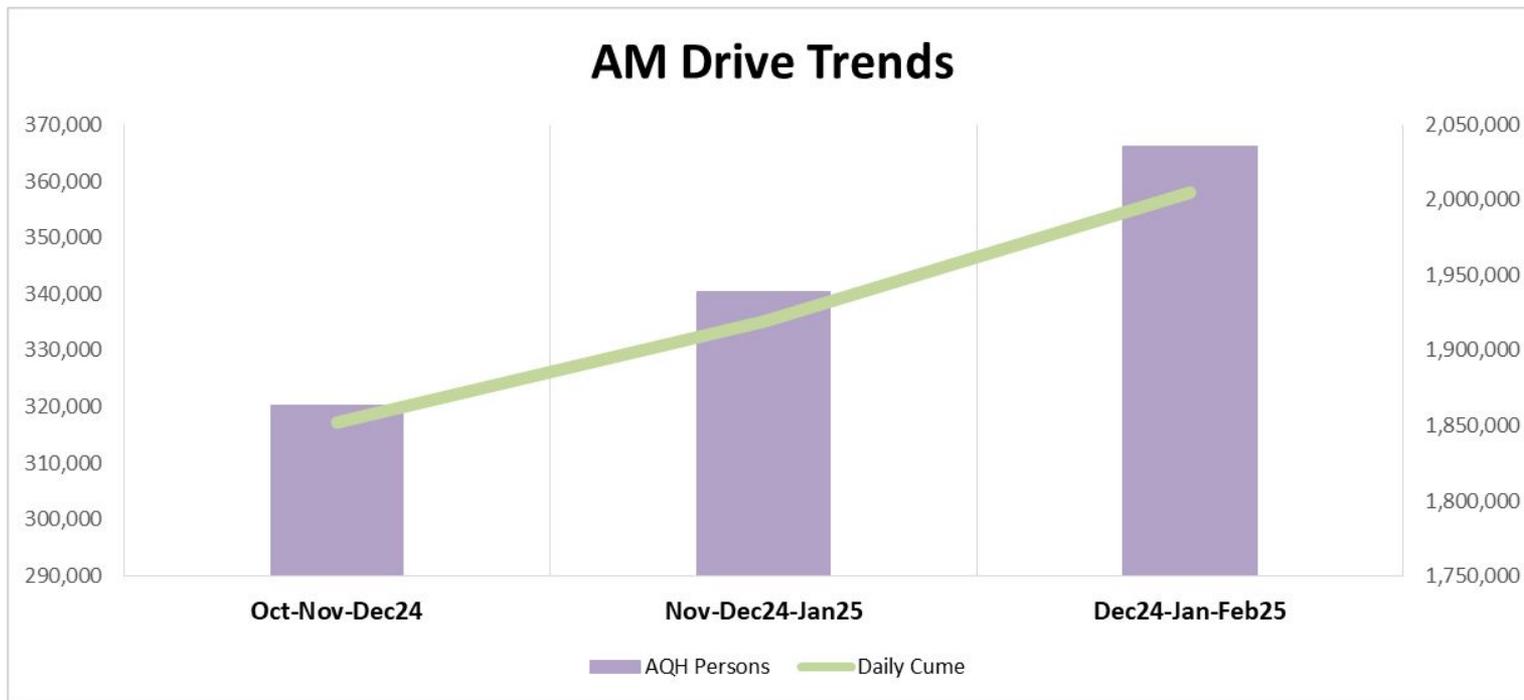
Persons 25-54, select PPM markets (5): *Sum of top 10 stations ranked on Feb25*

Daily Cume	Oct-Nov-Dec24	Nov-Dec24-Jan25	Dec24-Jan-Feb25	% increase Oct-Nov-Dec to Dec-Jan-Feb
AM Drive (Mon-Fri)	1,852,000	1,919,400	2,005,200	+8%
Mid Day (Mon-Fri)	1,900,300	1,978,600	2,020,200	+6%
PM Drive (Mon-Fri)	2,111,900	2,186,300	2,240,100	+6%
AQH Persons	Oct-Nov-Dec24	Nov-Dec24-Jan25	Dec24-Jan-Feb25	% increase Oct-Nov-Dec to Dec-Jan-Feb
AM Drive (Mon-Fri)	320,300	340,400	366,100	+14%
Mid Day (Mon-Fri)	352,500	366,900	377,300	+7%
PM Drive (Mon-Fri)	351,000	364,900	377,000	+7%

Source: Miami, Milwaukee, New York, Sacramento, St. Louis PPM Markets. Persons 25-54, multiple dayparts. 3-book average comparisons (Oct-Nov-Dec24; Nov24-Dec24-Jan25; Dec24-Jan25-Feb25). Top 10 stations ranked on Feb25.

Daily cume & AQH are directly correlated

Persons 25-54, select PPM markets (5): *Sum of top 10 stations ranked on Feb25*



Source: Miami, Milwaukee, New York, Sacramento, St. Louis PPM Markets. Persons 25-54, multiple dayparts. 3-book average comparisons (Oct-Nov-Dec24; Nov24-Dec24-Jan25; Dec24-Jan25-Feb25). Top 10 stations ranked on Feb25.

AQH Rating Increases

Persons 25-54, select PPM markets (5): *Average of top 10 stations ranked on Feb25*

AQH Rating	Oct-Nov-Dec24	Nov-Dec24-Jan25	Dec24-Jan-Feb25
AM Drive (Mon-Fri)	0.3	0.3	0.4
Mid Day (Mon-Fri)	0.3	0.4	0.4
PM Drive (Mon-Fri)	0.3	0.4	0.4

Source: Miami, Milwaukee, New York, Sacramento, St. Louis PPM Markets. Persons 25-54, multiple dayparts. 3-book average comparisons (Oct-Nov-Dec24; Nov24-Dec24-Jan25; Dec24-Jan25-Feb25). Top 10 stations ranked on Feb25.

3 book averages: rollout calendar

Release Date	NOV 2024	DEC 2024	HOL 2024	JAN 2025	FEB 2025	MAR 2025
1/28/25	No Change					
2/24/25		3-minute qualifier in one book				
3/24/25			3-minute qualifier in two books			
4/22/25				3-minute qualifier in all books		

Benefits of adopting the 3 minute qualifier

- **Grow measurable ad impressions**
- Reporting **robust daily cume, improved stability**
- **Expands advertiser choice** with more viable dayparts and formats
- **Programming freedom** to optimize commercial placement
- Help your **top market index** on national buys
- More **Ad occurrence impressions for mix models**
- More inputs into **attribution** and **outcomes measurement**



Important dates

- January 2025 survey dates: 1/9/25 - 2/5/25
- February 2025 survey dates: 2/6/25 - 3/5/25
- March MONTHLY data delivers on April 22nd
- First 3-book average (Jan/Feb/Mar) delivers on April 22nd
- Spring 2025 Nationwide Data /NRD Delivers in September 2025.

Support Materials

Modernizing PPM Audio Measurement

To be counted in a radio station's Nielsen audience estimate, reported listening sessions historically must total to at least 5 minutes within the quarter hour. Even though the PPM is capable of more granular measurement, there has been no change to this edit rule until now. Nielsen will be modifying the minimum qualifier to credit listening from **5 minutes to 3 minutes**.

The need for change: Better aligning today's radio measurement with today's radio usage

New listeners come to radio equally throughout any given hour. As you can see from the chart on the right showing a distribution of start times across an average hour, people come to radio equally at every minute. Listening start times do not coincide with the start of a quarter hour. New listeners come to the radio every minute of the day.

Nevertheless, Nielsen still reports impressions based on 15-minute segments called "quarter hours." The Quarter Hour, by definition, requires all qualified listening to occur within the walls of one of the four specific 15-minute segments of the clock. In some instances, a 5-minute listening session can be cut to as few as 3 minutes if the 5-minute listening session is interrupted by the quarter hour break (Nielsen only credits at the whole minute level). These are real impressions that would be counted if they did not cross over the break between quarter hours.

An average hour of radio listening

No impressions credited
5 minutes of listening

Only 1 impression credited
10 minutes of listening

Only 1 impression credited
23 minutes of listening

3-Minute Listening Qualifier Market Table

Persons estimates would have been qualified by this amount in the May 2024 survey from a 5-minute to 3-minute minimum listening threshold

Market	Percent	Percent	Percent	Percent	Percent
AK	+24%	+26%	+25%	+24%	+23%
AL	+22%	+23%	+28%	+25%	+23%
AR	+22%	+23%	+25%	+25%	+23%
AS	+24%	+22%	+25%	+25%	+23%
AZ	+24%	+25%	+25%	+25%	+23%
CA	+24%	+25%	+25%	+25%	+23%
CO	+24%	+25%	+25%	+25%	+23%
CT	+24%	+25%	+25%	+25%	+23%
DC	+24%	+25%	+25%	+25%	+23%
DE	+24%	+25%	+25%	+25%	+23%
FL	+24%	+25%	+25%	+25%	+23%
GA	+24%	+25%	+25%	+25%	+23%
IA	+24%	+25%	+25%	+25%	+23%
ID	+24%	+25%	+25%	+25%	+23%
IL	+24%	+25%	+25%	+25%	+23%
IN	+24%	+25%	+25%	+25%	+23%
KS	+24%	+25%	+25%	+25%	+23%
KY	+24%	+25%	+25%	+25%	+23%
LA	+24%	+25%	+25%	+25%	+23%
MA	+24%	+25%	+25%	+25%	+23%
MD	+24%	+25%	+25%	+25%	+23%
ME	+24%	+25%	+25%	+25%	+23%
MI	+24%	+25%	+25%	+25%	+23%
MN	+24%	+25%	+25%	+25%	+23%
MO	+24%	+25%	+25%	+25%	+23%
MS	+24%	+25%	+25%	+25%	+23%
MT	+24%	+25%	+25%	+25%	+23%
NC	+24%	+25%	+25%	+25%	+23%
ND	+24%	+25%	+25%	+25%	+23%
OH	+24%	+25%	+25%	+25%	+23%
OK	+24%	+25%	+25%	+25%	+23%
OR	+24%	+25%	+25%	+25%	+23%
PA	+24%	+25%	+25%	+25%	+23%
RI	+24%	+25%	+25%	+25%	+23%
SC	+24%	+25%	+25%	+25%	+23%
SD	+24%	+25%	+25%	+25%	+23%
TN	+24%	+25%	+25%	+25%	+23%
TX	+24%	+25%	+25%	+25%	+23%
UT	+24%	+25%	+25%	+25%	+23%
VA	+24%	+25%	+25%	+25%	+23%
VT	+24%	+25%	+25%	+25%	+23%
WA	+24%	+25%	+25%	+25%	+23%
WI	+24%	+25%	+25%	+25%	+23%
WV	+24%	+25%	+25%	+25%	+23%
WY	+24%	+25%	+25%	+25%	+23%

Preparing for the Adjustment

Refer to market grids based on May 2024 Impact data - This sheet compares the average (AQH) audience increases from the 5-minute and 3-minute listening threshold across all PPM markets for a variety of demo groups. (Evaluation data available upon request from your Nielsen rep).

Conder the timing of a 3-book average - Be mindful of 3-book averages that contain the transition from 5-minute to the 3-minute qualifier. This would only impact averages that cross over from the end of 2024 (November, December or Holiday surveys) into Q1 2025 (the new qualifier starts with the January 2025 survey).

Posting and Buying local PPM markets and Nationwide- The change to the 3-minute threshold can result in different delivery if survey methodologies are not aligned.

Network Radio will see smaller overall increases, with improved top-market delivery - Since network radio is a combination of PPM and Diary measurement, the gains will only appear in the largest markets that account for roughly one-third of the US radio audience, while the other two-thirds reported via the diary methodology will remain unchanged.

Seasonality & Variability - Regular seasonal patterns in Radio audience listening levels will continue on a month-to-month basis (listening tends to peak in the spring and fall); as will panel-based variability.

No change to Diary Markets - Because few diaries contain listening occasions shorter than 5 minutes it is unnecessary to revise the listening threshold in Diary markets.

RAB – Assisting With Industry Education

- One Voice for Radio 3-Minute Qualifier destination: www.rab.com/onevoice
 - Nielsen created resources and FAQs to help the industry understand the transition in measurement
 - One sheets, advertising prospect/client presentations and social media tiles to explain/promote the change and its opportunities.
 - Open page available to RAB members as well as nonmembers

RAB.com 



