

# SINGAPORE AUDIO CONSUMPTION PATTERNS



# RADIO CONSUMPTION PATTERNS

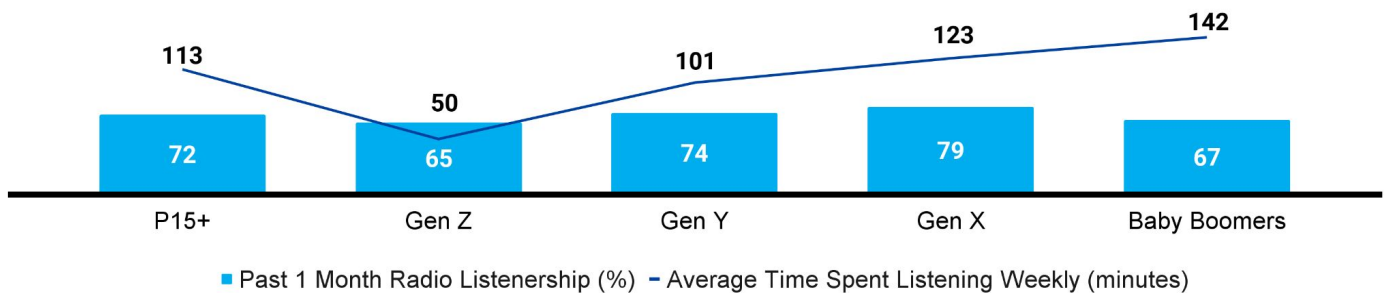
GEN X AND BABY BOOMERS TUNE IN TO RADIO ALMOST ON A DAILY BASIS AND ON AVERAGE FOR A LONGER PERIOD OF TIME

**7 in 10 of Singapore's P15+ population** tuned into radio in the past 1 month.

**Radio reach** is relatively higher among the Gen Y and Gen X segments.

Time Spent on radio, among radio listeners **increases proportionately with age.**

## RADIO LISTENING (REACH & TIME SPENT LISTENING)



\*Radio listening refers to tuning into local radio stations, either via traditional or digital platforms

\*\*Gen Z refers to Singapore adults aged 15-24, Gen Y refers to Singapore adults aged 25-39, Gen X refers to Singapore adults aged 40-54, Baby Boomers refers to Singapore adults aged 55 and above

\*\*\*Time Spent Listening is calculated by combining listeners responses based on their weekday and weekend listening

## BEYOND AUDIO ENTERTAINMENT, RADIO IS A PLATFORM FOR NEWS AND INFORMATION

### TOP 5 REASONS PEOPLE LISTEN TO RADIO (among past 1 month radio listeners)

**GOOD ENTERTAINMENT VALUE**

**PROVIDES USEFUL INFORMATION**

**RADIO IS IMPORTANT IN MY LIFE**

**TRUSTED SOURCE OF INFORMATION**

**GOOD FOR FINDING OUT WHAT'S NEW**

# RADIO ADS REVENUE BOUNCED BACK AFTER BEING HIT BY THE PANDEMIC

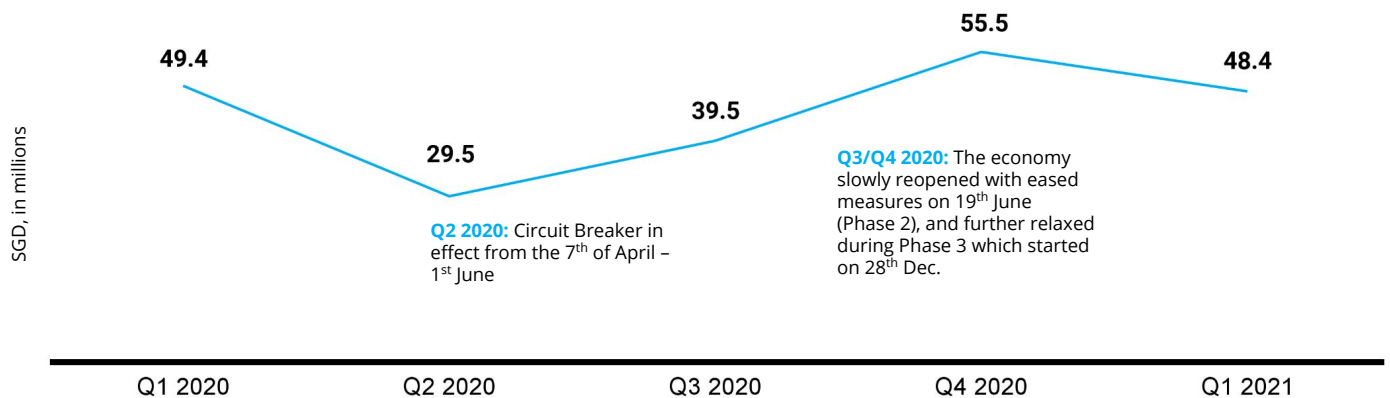
With the progression of the cases (more than 50,000 COVID-19 cases on first half of 2020) Circuit Breaker was implemented in effect from the 7th of April and various economy sectors were closed down. The impact on ad spend landscape gets accentuated as reflected to the drop of ad spend in Q2 2020. Multiple retail outlets like Harvey Norman, Courts, Gain City and other department stores were reducing their ad spend across media advertising platforms including radio.

With the eased measures and phased reopening of the market, ad spend numbers start to revive for previously-hit categories, like beauty/fitness services and retail, furnishing/electrical stores & brands. With the launch of SingapoRediscover vouchers in December 2020, Travel & Tourism category (i.e. from Singapore Tourism Board, Royal Caribbean, etc.) slowly start to make a come-back.

## RADIO AD SPEND Q1 2020 - Q1 2021 BY QUARTER

Q1 2020 (\$49.4M) vs. Q1 2021 (\$48.4M)

Overall: -\$1M (-2%)



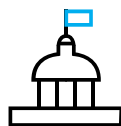
Source: Nielsen Singapore Ad Intel  
Media Type: Radio, Data period: Q1 2020 - Q1 2021, Metrics: advertising spend in SGD, in millions.

## RADIO TOP CATEGORY AD SPEND: Q1 2021

\*Category coverage / definition please refer to Appendix



RETAIL



GOVERNMENT SERVICES



OTHER PORTALS / INTERNET



PETROLEUM PRODUCTS

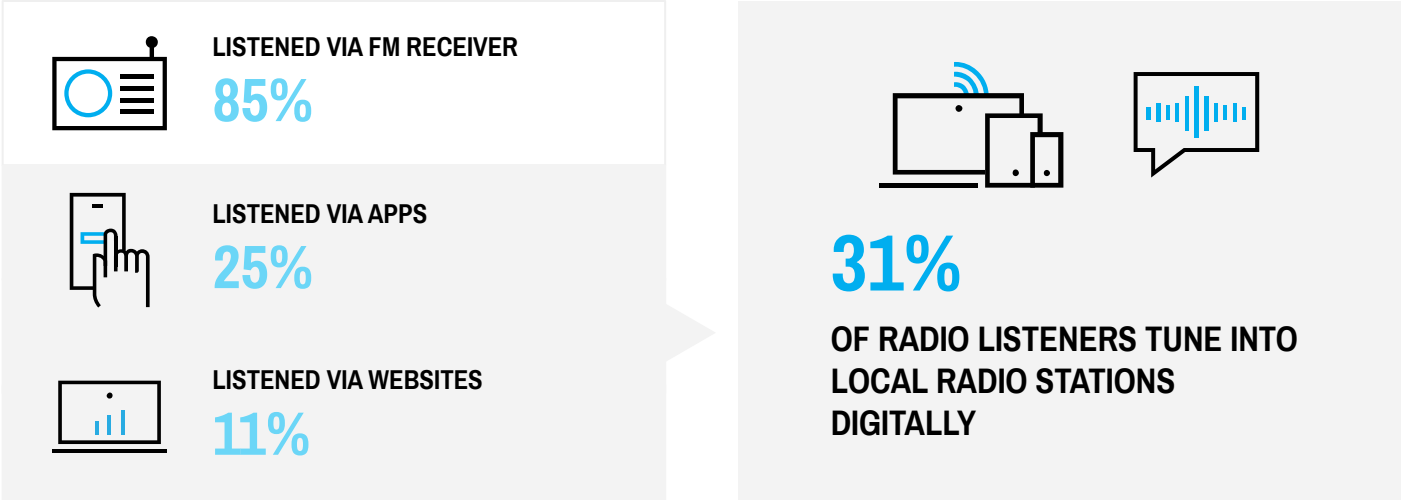


PHARMACEUTICALS

Source: Nielsen Singapore Ad Intel  
Media Type: Radio, Data period: Q1 2021, Metrics: top ranking categories by total advertising spend.

# WHO ARE DIGITAL LISTENERS AND HOW LONG DO THEY LISTEN TO DIGITAL RADIO

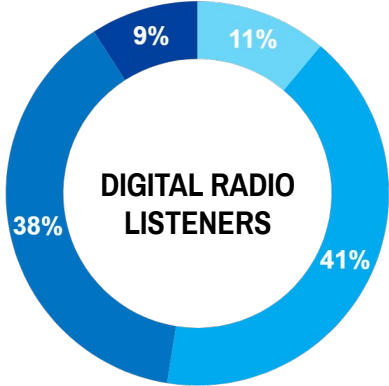
## PAST 1 MONTH RADIO LISTENERS WHO...



RADIO LISTENING PREDOMINANTLY VIA FM RECEIVER. GEN X AND GEN Y SEGMENTS ACCOUNT FOR 80% OF DIGITAL LISTENERS

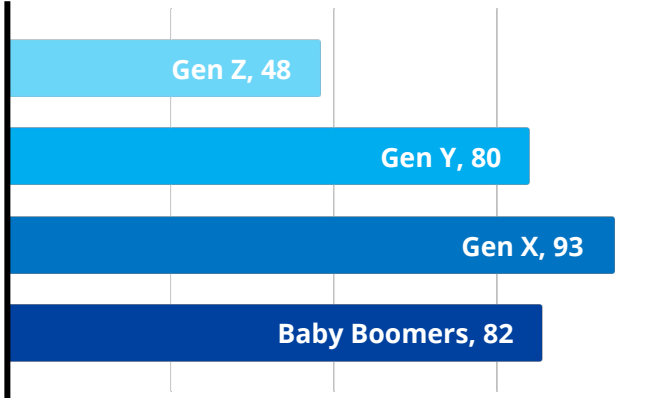
## FOCUSING ON OUR PAST 1 MONTH DIGITAL RADIO LISTENERS...

PROPORTION (%)



■ Gen Z ■ Gen Y ■ Gen X ■ Baby Boomers

AVERAGE WEEKLY TIME SPENT LISTENING (MINUTES)



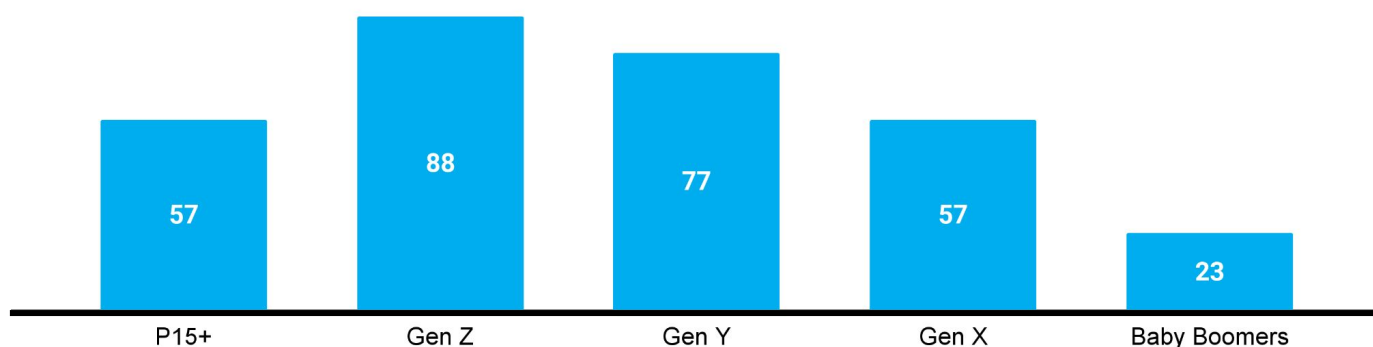
\*Digital radio listeners refer to those who listen to radio stations via apps/websites  
 \*\*Time Spent Listening is calculated by combining listeners responses based on their weekday and weekend listening  
 Source: Nielsen Singapore Consumer Media View 2020

# YOUNGER SEGMENTS ESPECIALLY GEN Z TEND TO...

1

## INCLUDE NON-RADIO AUDIO SOURCES IN THEIR LISTENING REPERTOIRE

PAST 1 MONTH LISTENERSHIP TO NON-RADIO AUDIO SOURCES (%)

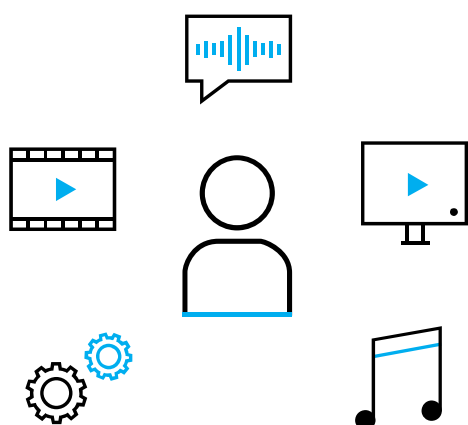


Source: Nielsen Singapore Consumer Media View 2020

OTHER AUDIO SOURCES REFER TO PLATFORMS (ACCESSED VIA INTERNET) WHICH ALLOW DOWNLOADING/STREAMING OF MUSIC (I.E. SPOTIFY, YOUTUBE, APPLE MUSIC, AUDIOBOOKS) OR OFFLINE SUCH AS MUSIC VIA CDS, DOWNLOADED SONGS

2

## USE TOP PLATFORMS SUCH AS YOUTUBE AND SPOTIFY FOR MUSIC STREAMING



Among Gen Z and Gen Y segments, at least **7 in 10** tuned in to either YouTube or Spotify in the past month.



For younger and future generations who will be increasing digitally savvy, competition for their share of time will be highly competitive within the audio space with multiple options and audio format available to them.

Source: Nielsen Singapore Consumer Media View 2020

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# APPENDIX

## ABOUT NIELSEN SINGAPORE CONSUMER & MEDIA VIEW STUDY

The Nielsen Singapore Consumer & Media View Study was conducted between July 2019 to June 2020. The database consists of three components:

Media Index & Consumer Insights (surveyed among 4,833 adult respondents), and Digital Consumer (surveyed among 1,608 adult respondents who use the internet at least once a month). Results are weighted mainly by age, sex and race to be representative of the 4,310 ('000) people living in Singapore aged 15 and above.

## ABOUT NIELSEN SINGAPORE AD INTEL

Media coverage includes TV, Print (newspapers & magazines), Radio, Outdoor, and Digital. The ad spend is in Singapore Dollars and based on gross advertising expenditures in major media at published rate card values (excluding discount, bundled price, production cost, etc.). Information at time of print is accurate.

Digital ad spend coverage includes Desktop / Laptop / Mobile / Tablet for both Display and Video and excludes mobile apps, social media & sites that require login (i.e. premium / paid contents access), and search ads.

Media coverage includes Local radio stations based on Live/Broadcast programmes. The ad spend is in Singapore Dollars and based on gross advertising expenditures in major media at published rate card values (excluding discount, bundled price, production cost, etc.). Information at time of print is accurate.

Category grouping is based on Nielsen's discretion and categorization guidelines.

## AD INTEL CATEGORY DEFINITION / SCOPE

- **Government services:** Ministries, government bodies or organizations, government campaigns or public service announcements
- **Petroleum products:** Petroleum / fuel companies & brands
- **Pharmaceuticals:** Analgesics / Sedatives / Remedies, Cough / Cold & Sinus Remedies, Vitamins / Health Prep / Tonics
- **Retail:** Boutiques, Fashion outlets, Department stores, Retail / Shopping outlets
- **Other portals / internet:** Websites, Online / digital platforms including: e-commerce platforms, on-demand (audio, video), digital communication platforms, etc.

## ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a leading global data and analytics company that provides a holistic and objective understanding of the media industry. With offerings spanning audience measurement, audience outcomes and content, Nielsen offers its clients and partners simple solutions to complex questions and optimizes the value of their investments and growth strategies. It is the only company that can offer de-duplicated cross-media audience measurement. Audience is Everything™ to Nielsen and its clients, and Nielsen is committed to ensuring that every voice counts.

An S&P 500 company, Nielsen offers measurement and analytics service in nearly 60 countries. Learn more at [www.nielsen.com](http://www.nielsen.com) or [www.nielsen.com/investors](http://www.nielsen.com/investors) and connect with us on [Twitter](#), [LinkedIn](#), [Facebook](#) and [Instagram](#).

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