



TECHSURVEY 2018
JACOBS MEDIA

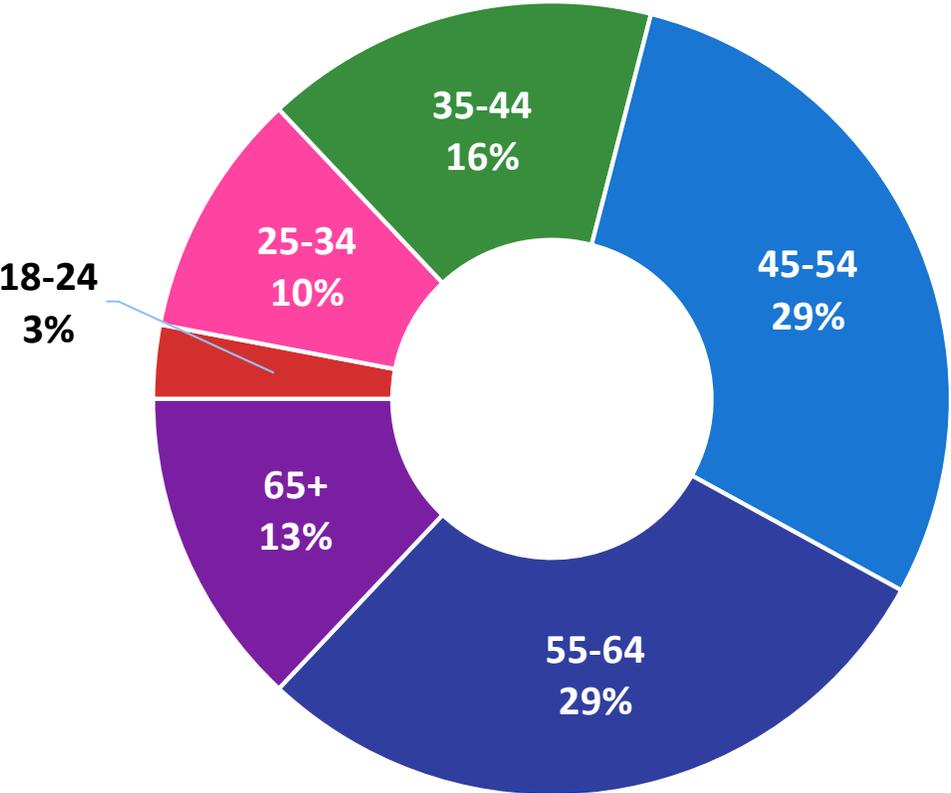
Radio Navigates the Digital Revolution

Methodology

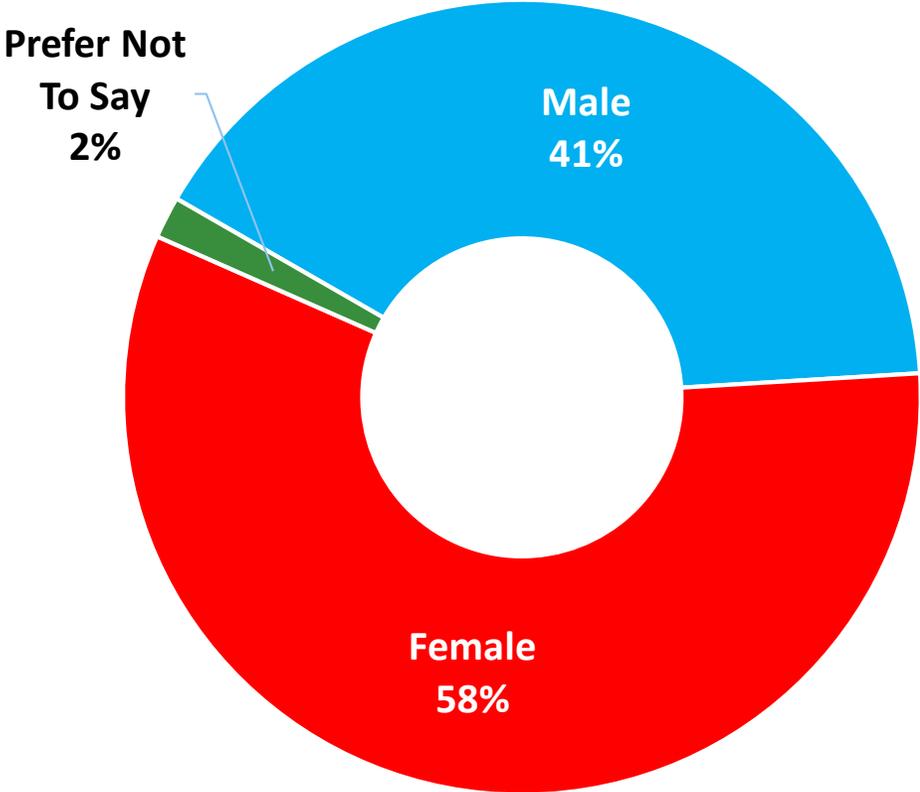
- 567 radio stations in the U.S. & Canada
- N = 64,289
- Interview dates: January 16 - February 26, 2018
- Most respondents are members of station databases. Some responses were gathered via station websites and/or social networking pages.
- All responses were collected online and weighted using Nielsen 2017 market populations data.
- This is a web survey and does not represent all radio listeners or even each station's audience. It is not stratified to the U.S./Canadian populations.

Demographics

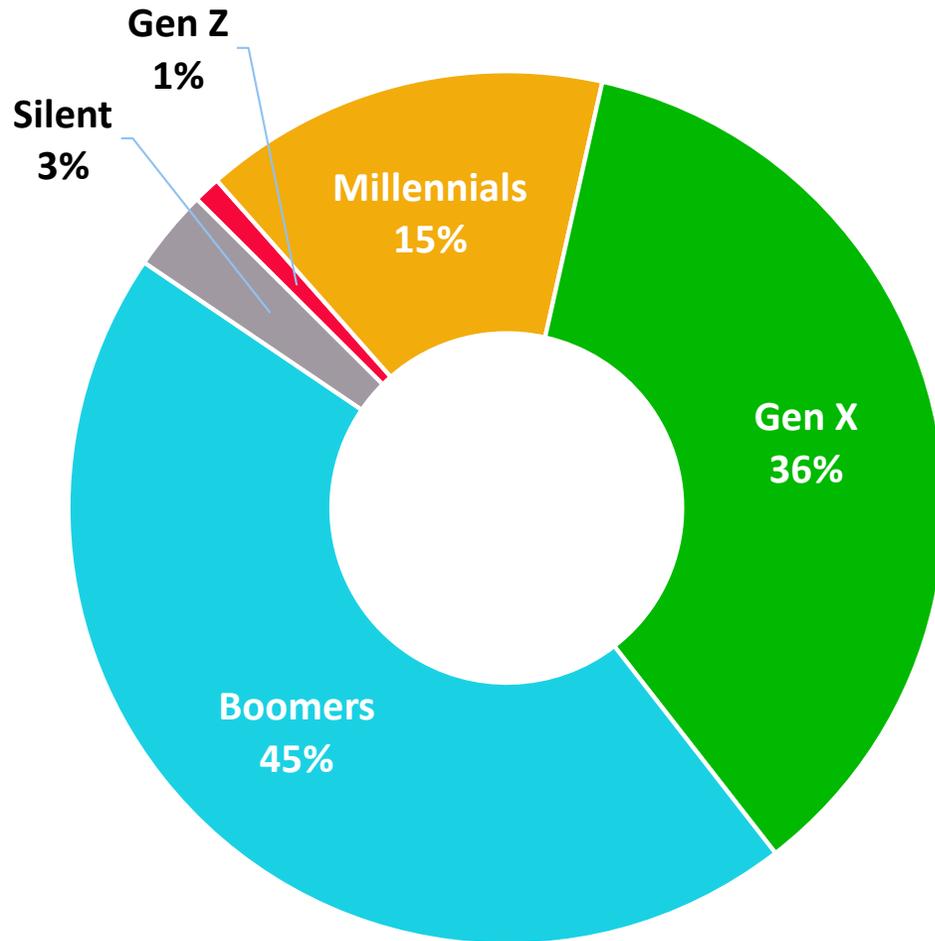
Age



Gender



Generations



Gen Z (born after 1996)

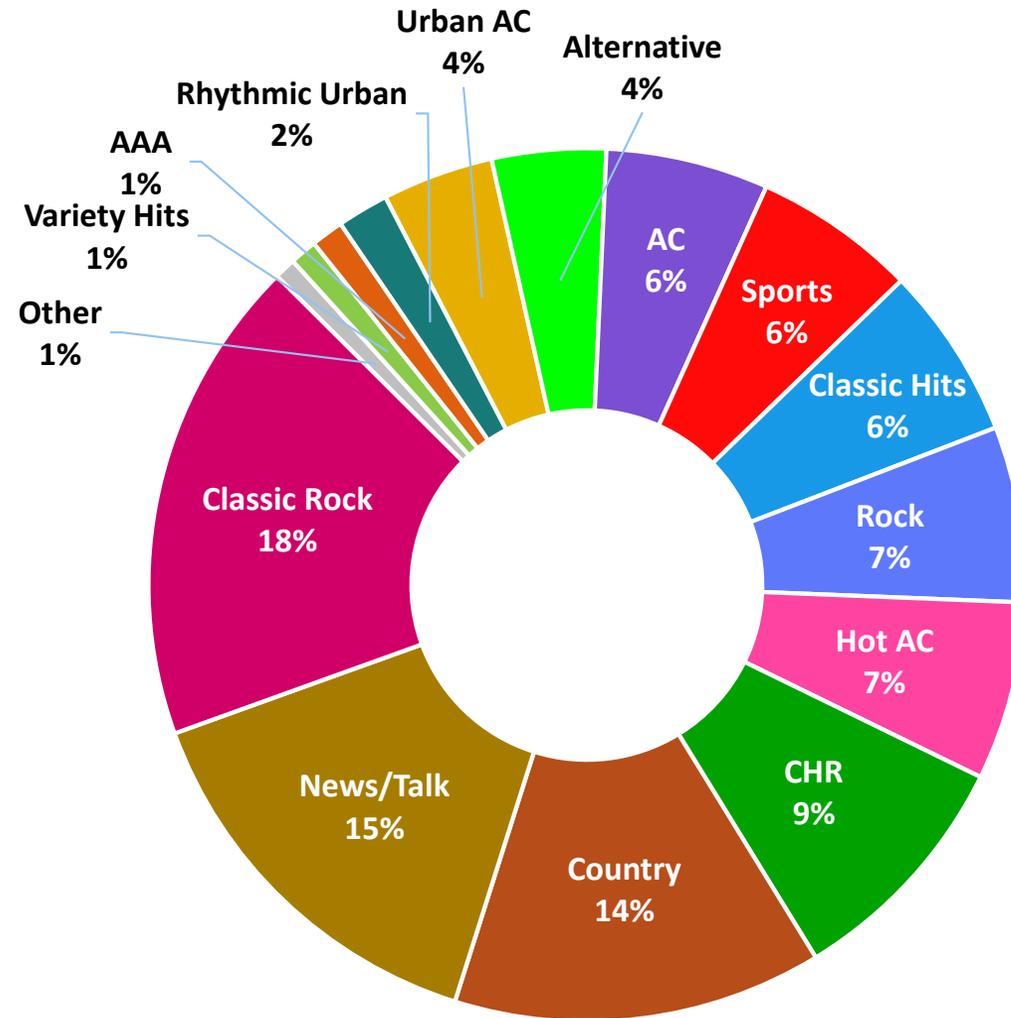
Millennials (born between 1981-1996)

Gen X (born between 1965-1980)

Baby Boomer (born between 1946-64)

Silent Generation (born before 1946)

Format Composition

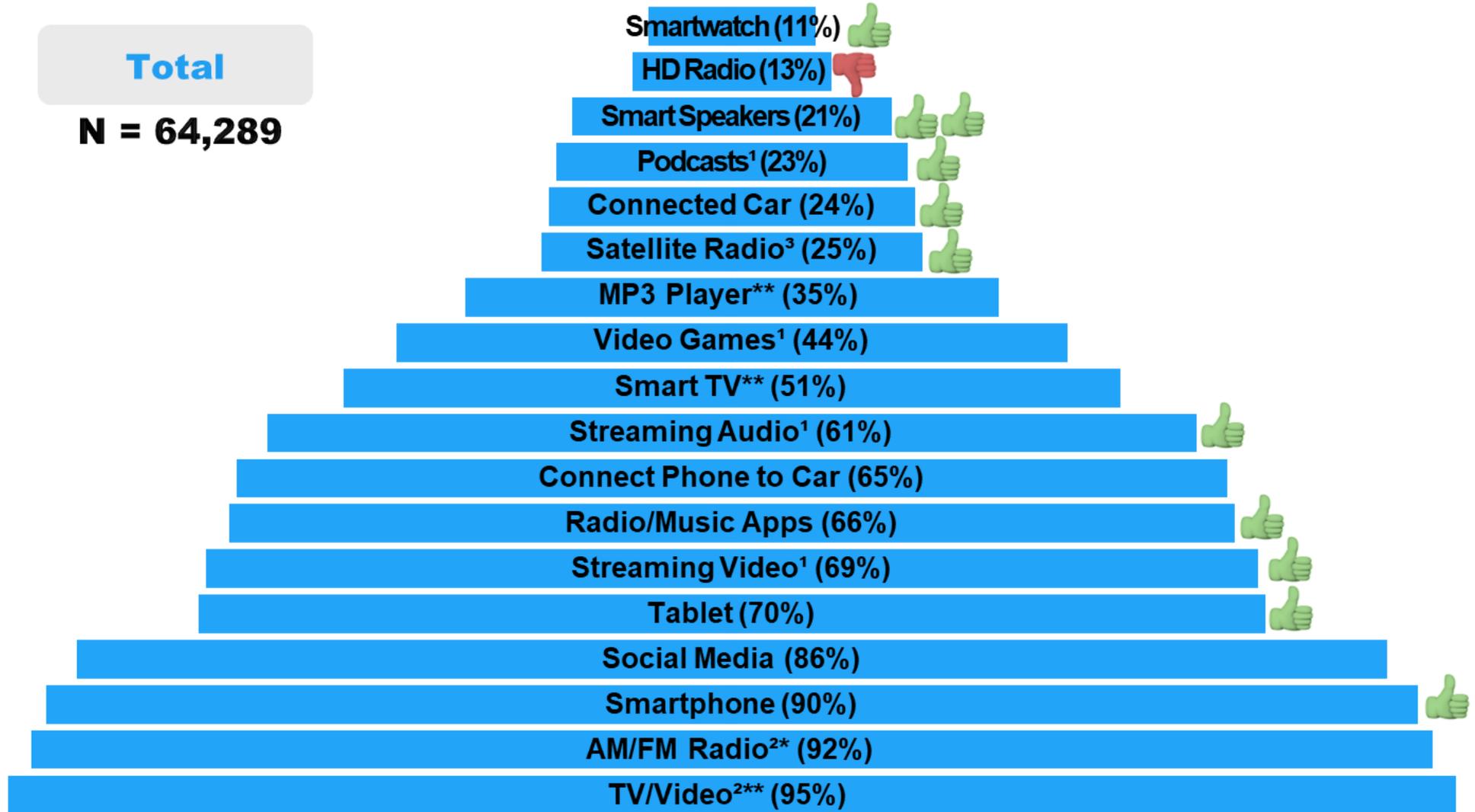




Media Pyramid 2018

Total

N = 64,289



Total TS 2017
8%
15%
11%
21%
22%
23%
**
44%
**
58%
64%
63%
66%
68%
86%
87%
91%
**

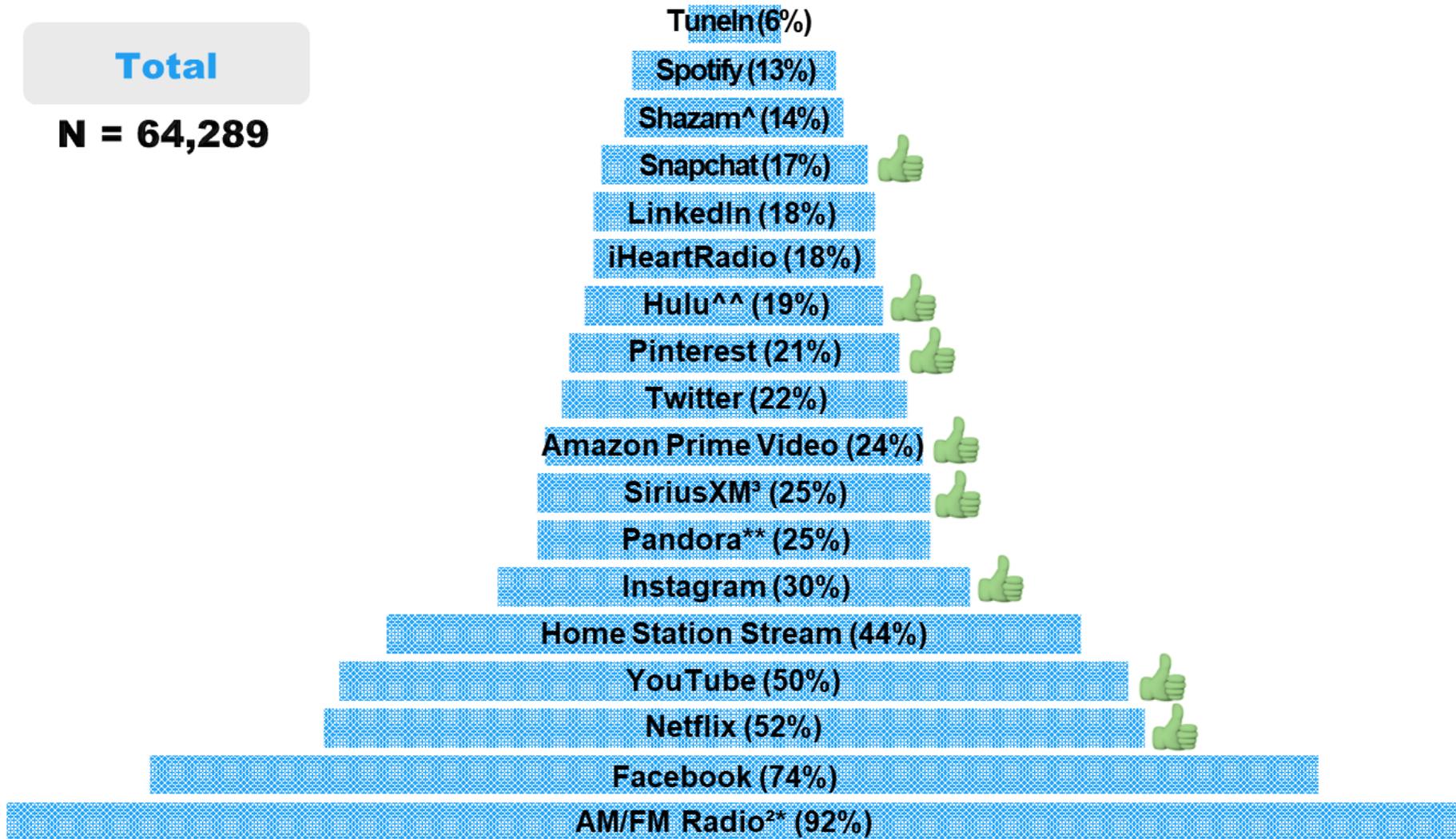
¹ Weekly or more ² 1+ hour per day ³ Paid & trial users * Any platform/device **Wording Change



Brand Pyramid 2018

Total

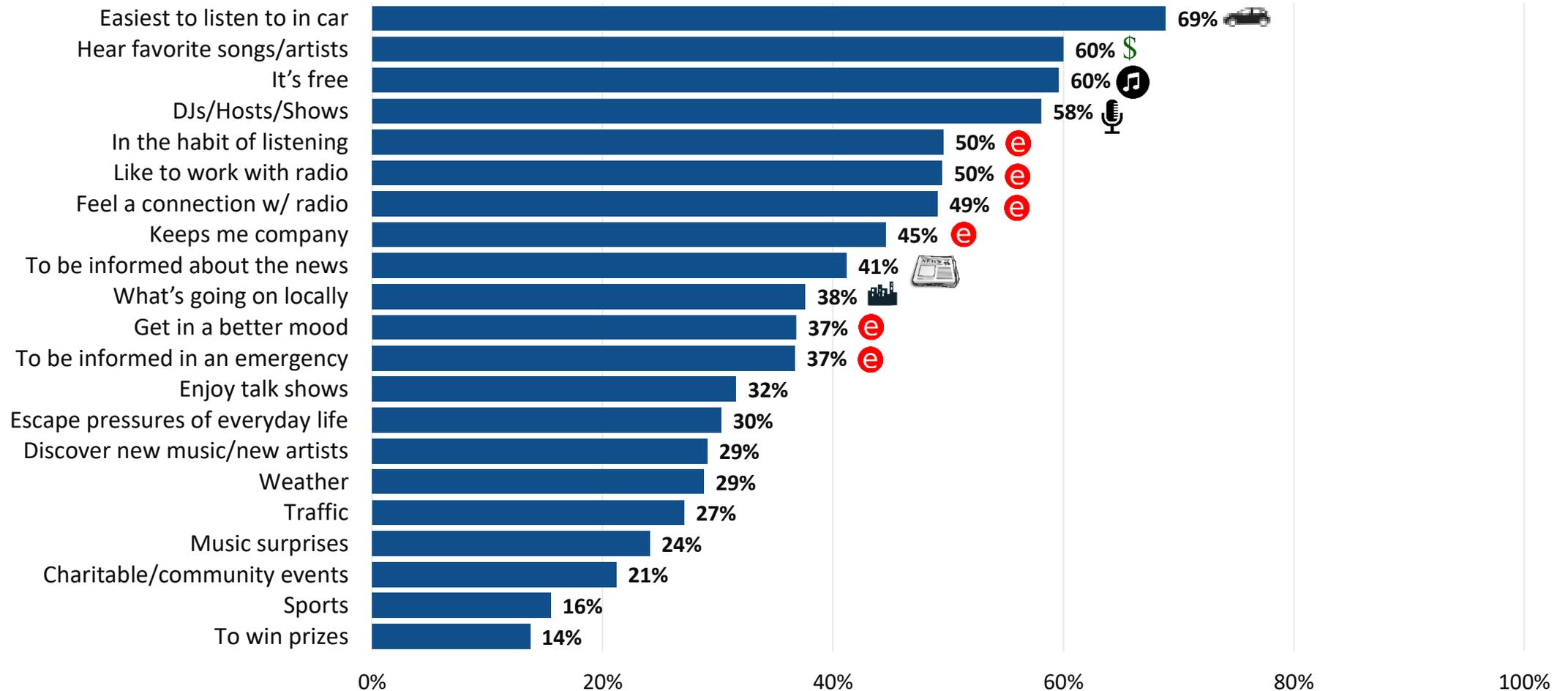
N = 64,289



Total TS 2017
7%
12%
15%
14%
17%
18%
9%
19%
22%
17%
23%
25%
25%
44%
48%
41%
75%
91%

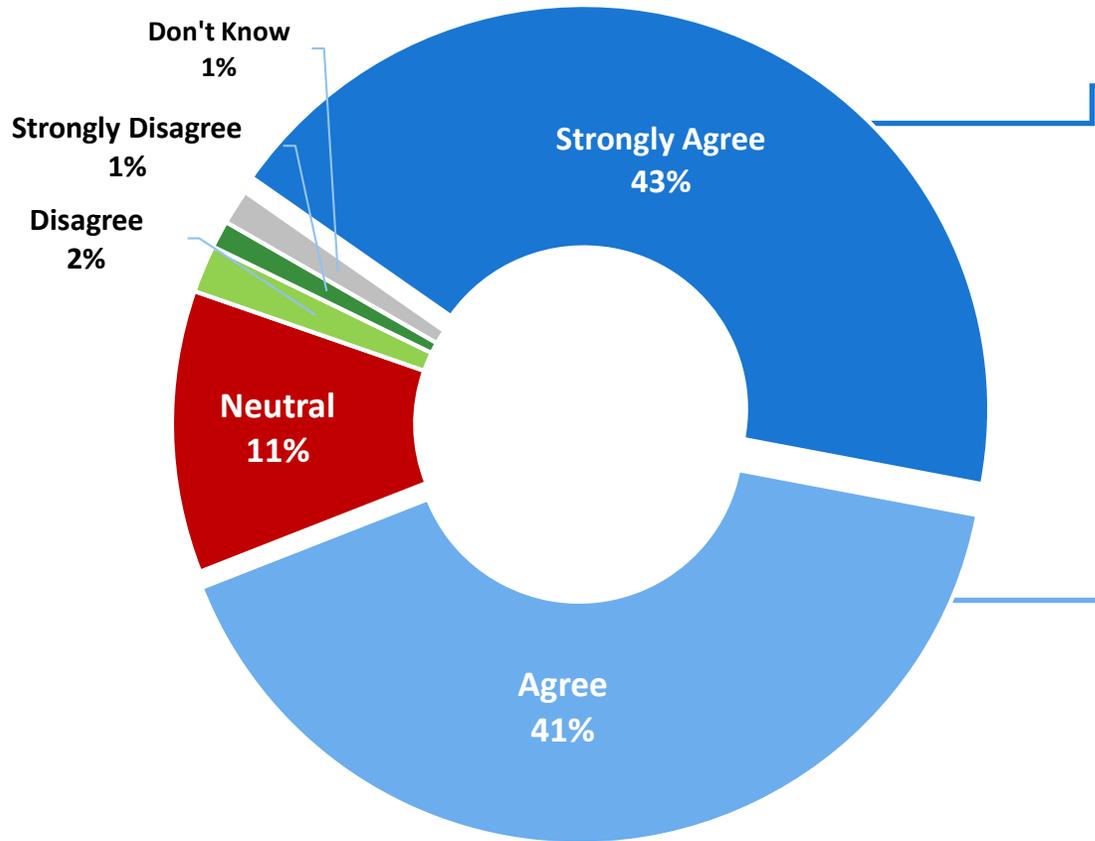
All weekly use unless noted ² 1+ hour per day ³ Paid & trial users ^{*}Any Platform/Device ^{**}Excluding Canada [^]Downloaded ^{^^}Includes Live TV

Why AM/FM Radio? Music & Personalities, But Also Easy to Listen In-Car, Free and Powerful Emotional Benefits

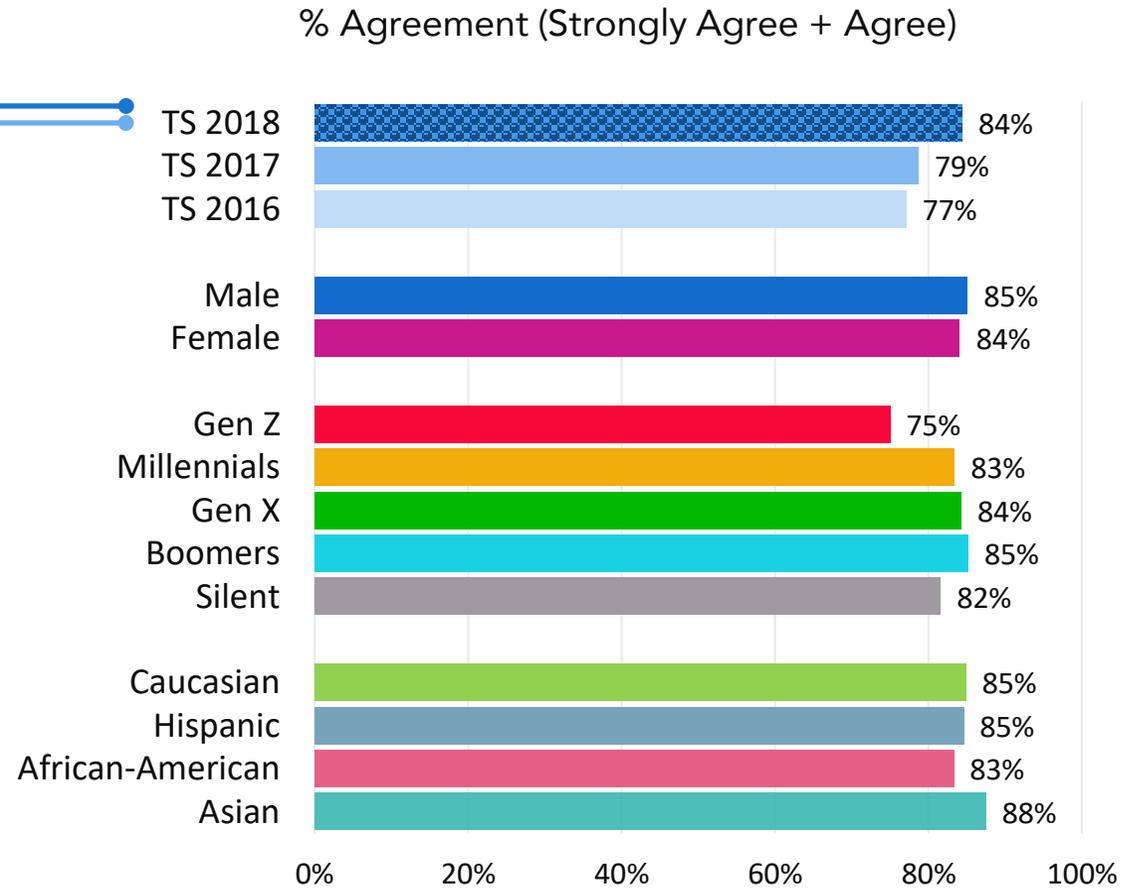


Among those who listen to AM/FM radio, % who say this is a main reason they listen

Radio's Local Orientation Continues to Stand Out As One of Its Primary Advantages

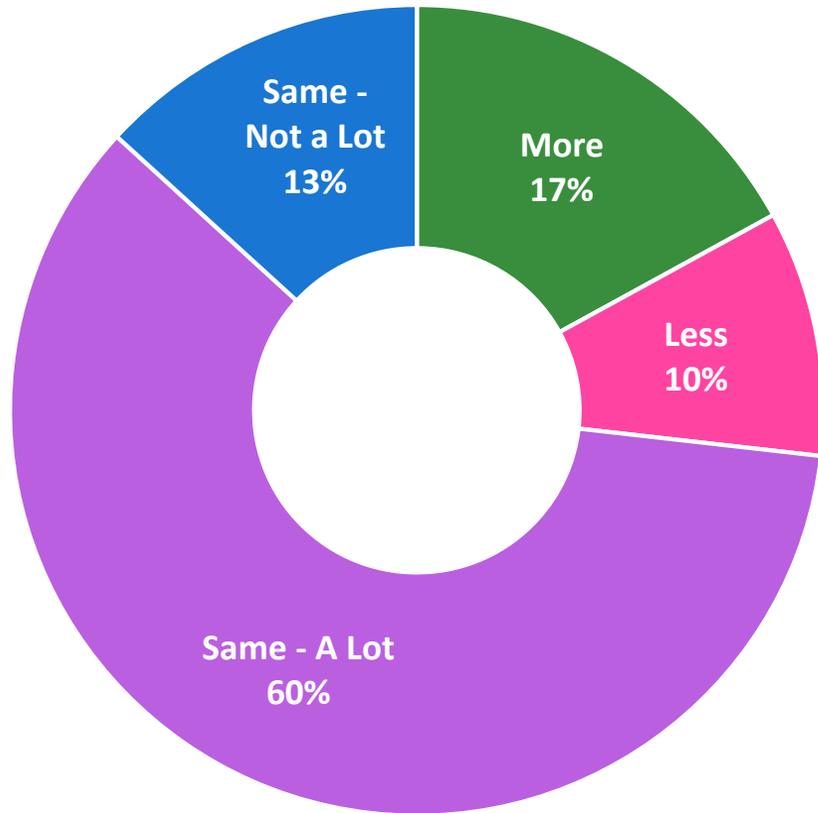


"One of radio's primary advantages is its local feel"

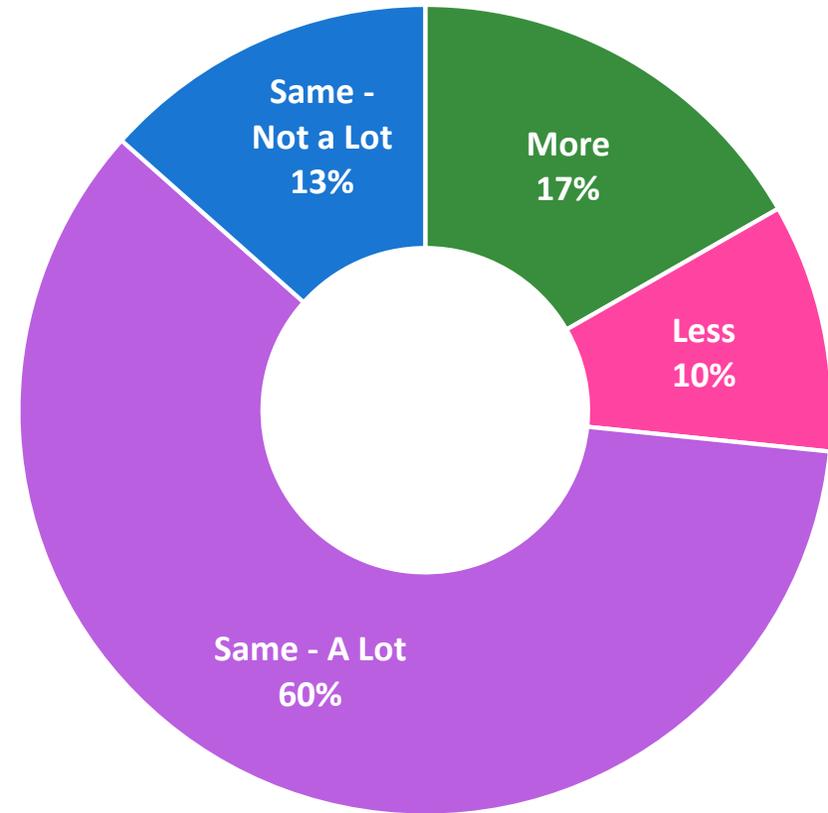


Past Year AM/FM Radio Listening Momentum Remains Strong

TS 2017

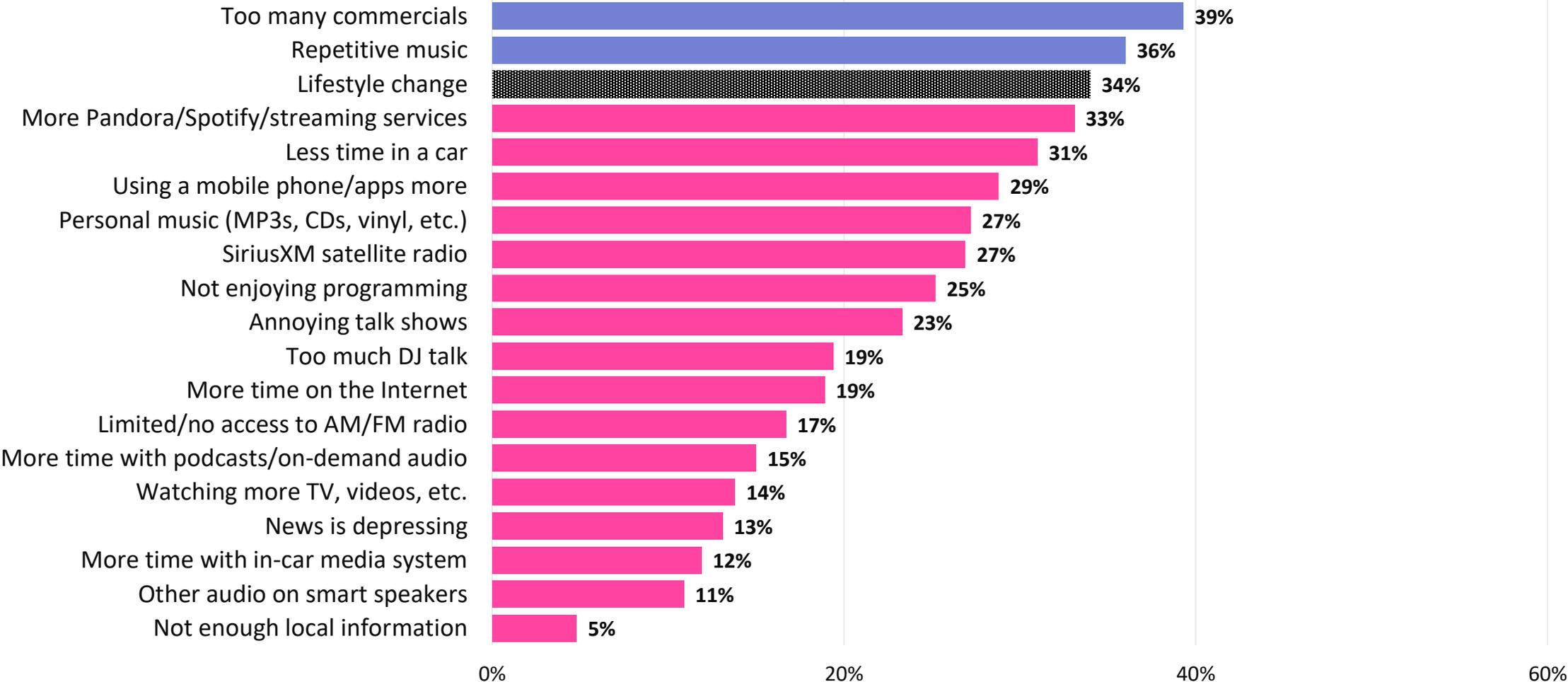


TS 2018



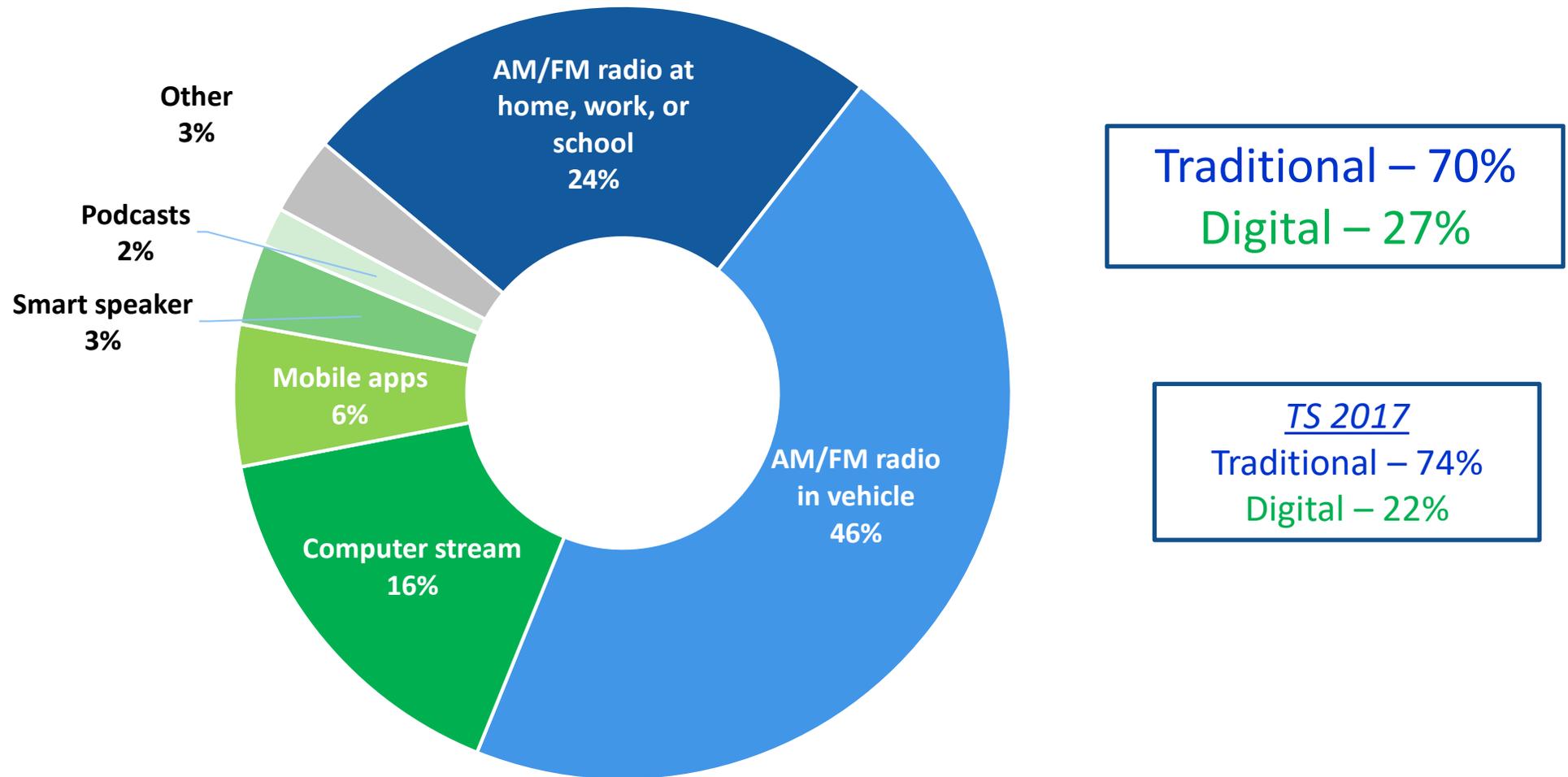
Among those who listen to AM/FM radio

Music Streaming Services (Pandora, Spotify, Etc.) Are the Main Reasons For Listening Less to AM/FM Radio

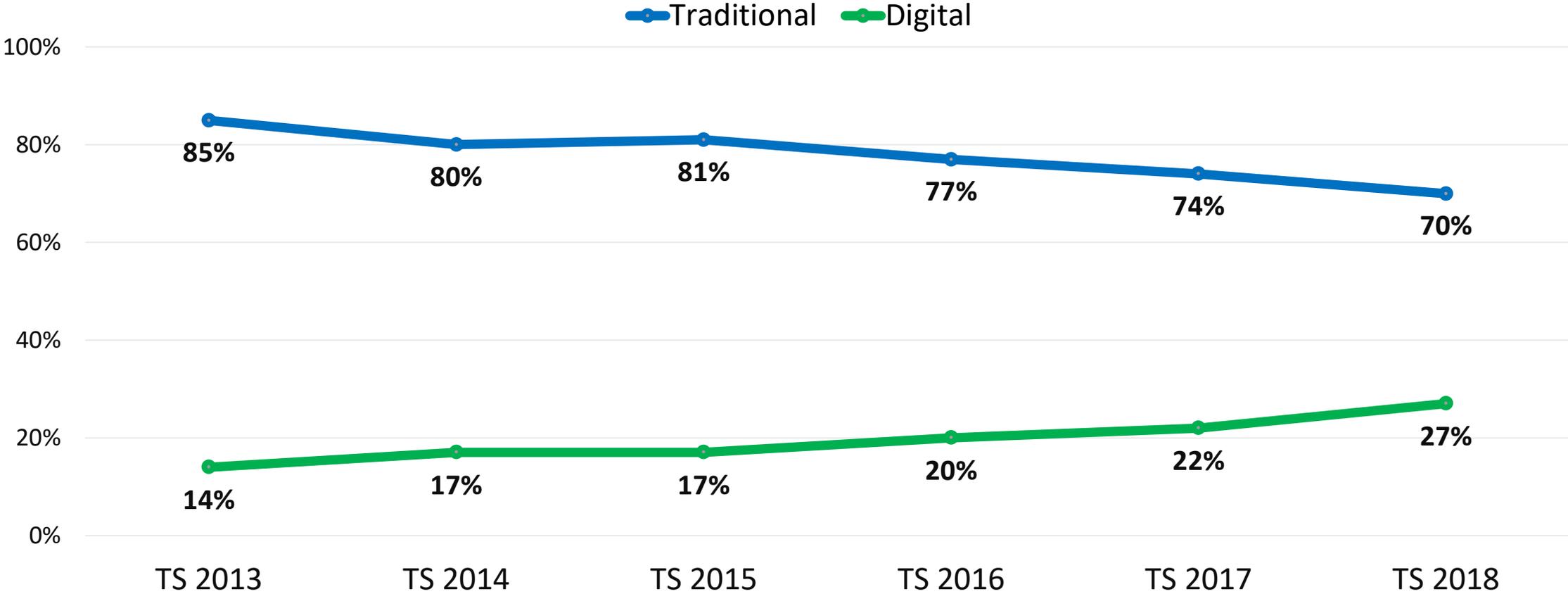


Among those who say they are listening less to AM/FM radio in the past year, % who say this is a main reason they listen less

Nearly Half of Home Station Listening Is on a Regular Radio In-Car; Overall the Traditional vs. Digital Gap Is Narrowing

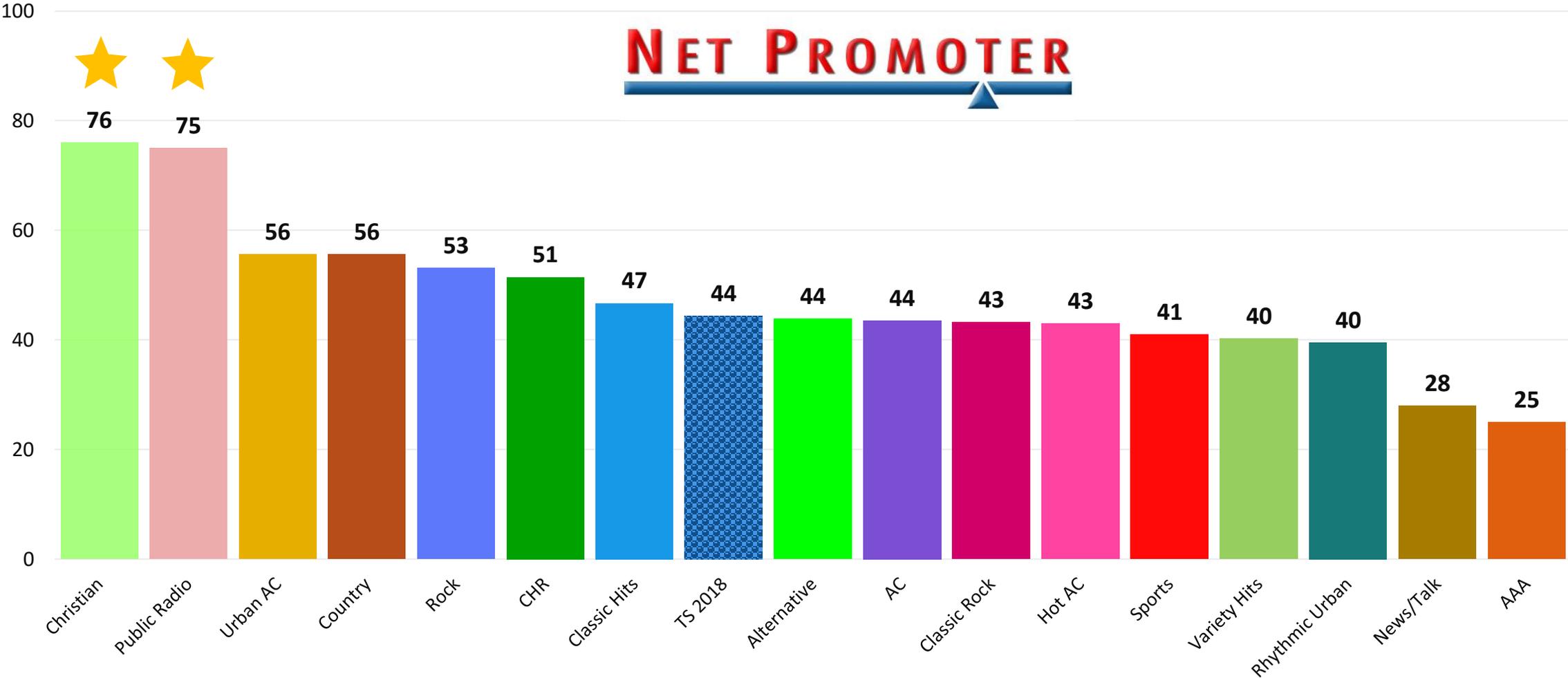


Home Station Listening Platform: Traditional vs. Digital

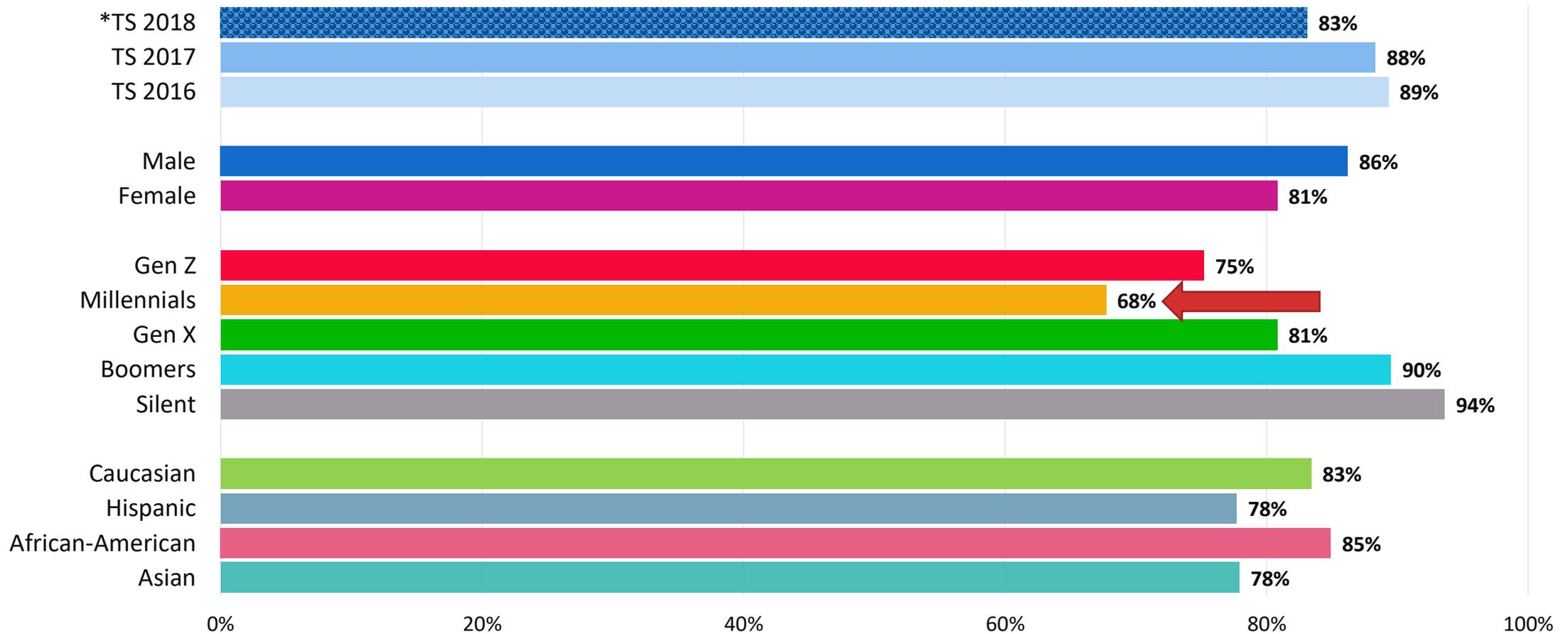


% of time spent with home station in a typical week via traditional platforms (an AM/FM radio at home/school/work or in a vehicle) vs. digital platforms (computer, mobile, smart speaker, podcasts)

The Highest “Net Promoter” Recommendation Scores Are for Urban AC, Country and Rock; Significantly Lower than Christian & Public Radio

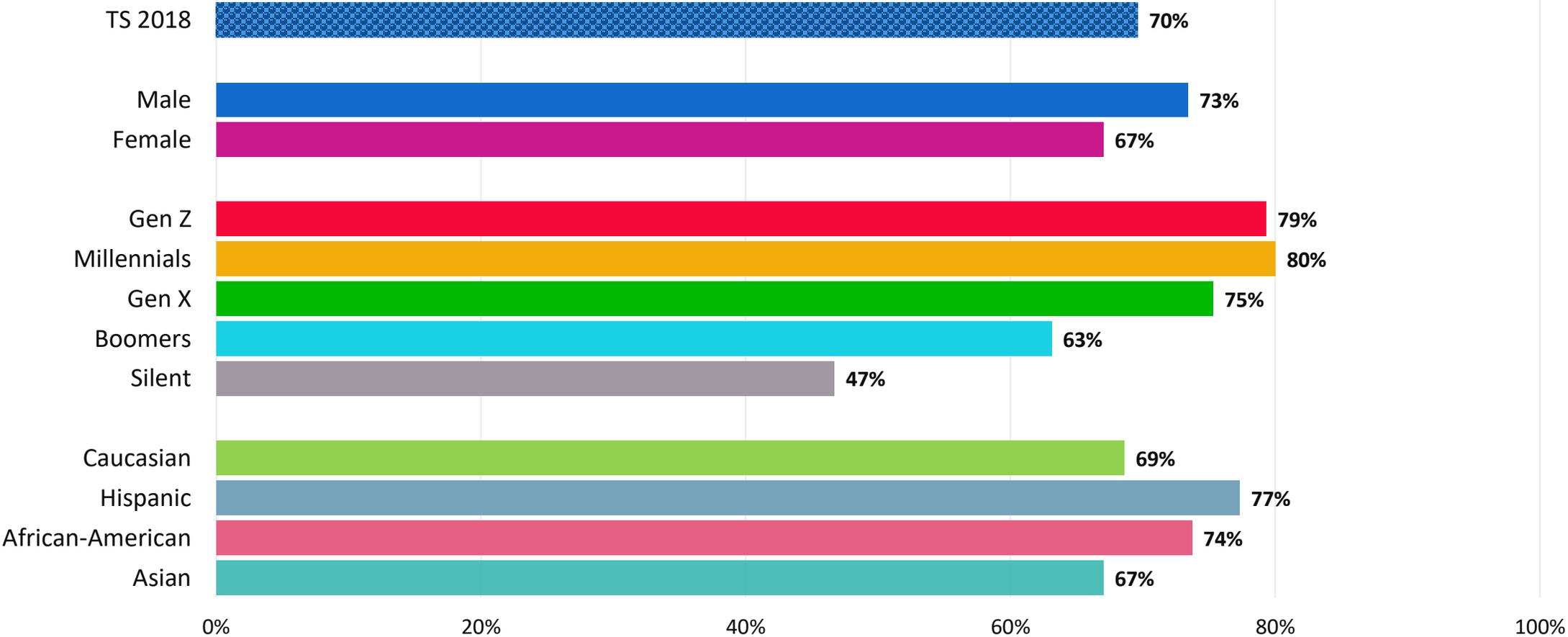


Only About Eight in Ten Have a Regular Radio Where They Live, While Only Two-Thirds of Millennials Do



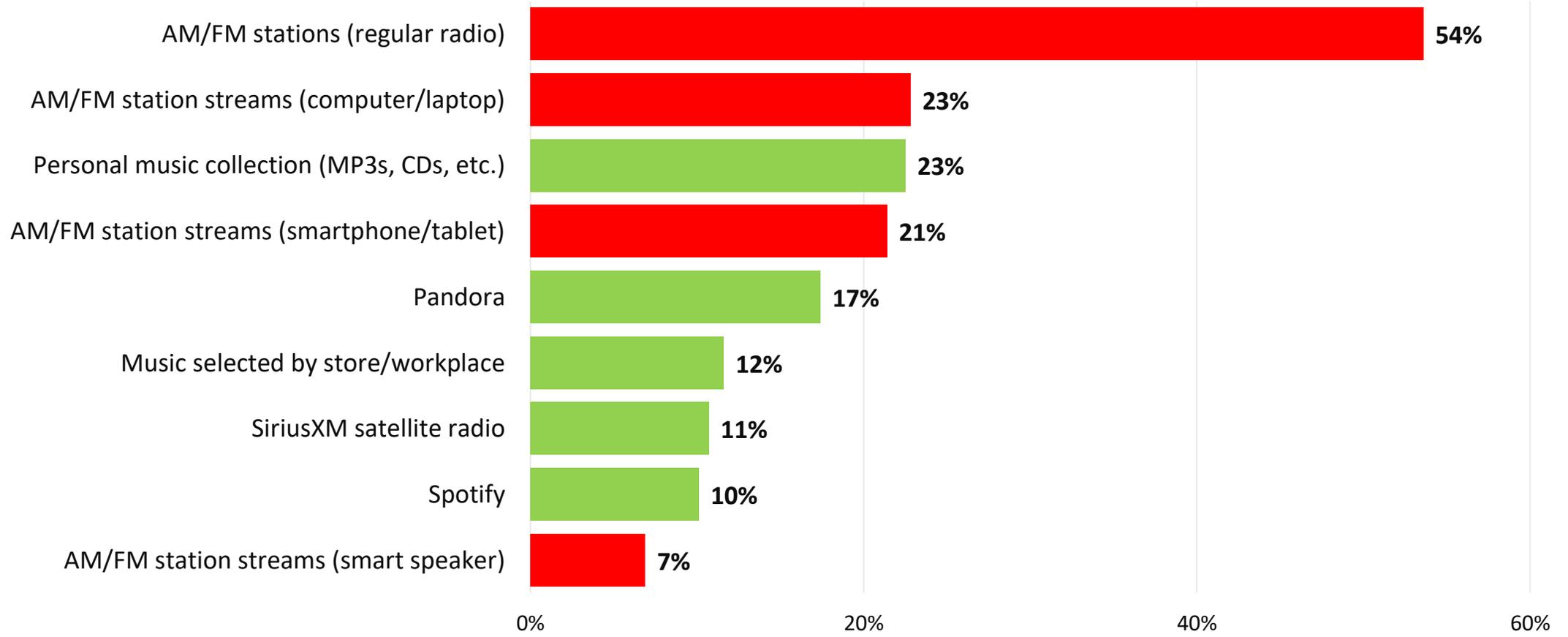
% with a regular radio in working condition where they live that they use*
*added wording: "...that you use?"

Seven in Ten Listen to Any Type of Audio While Working, Especially Men and Younger Respondents



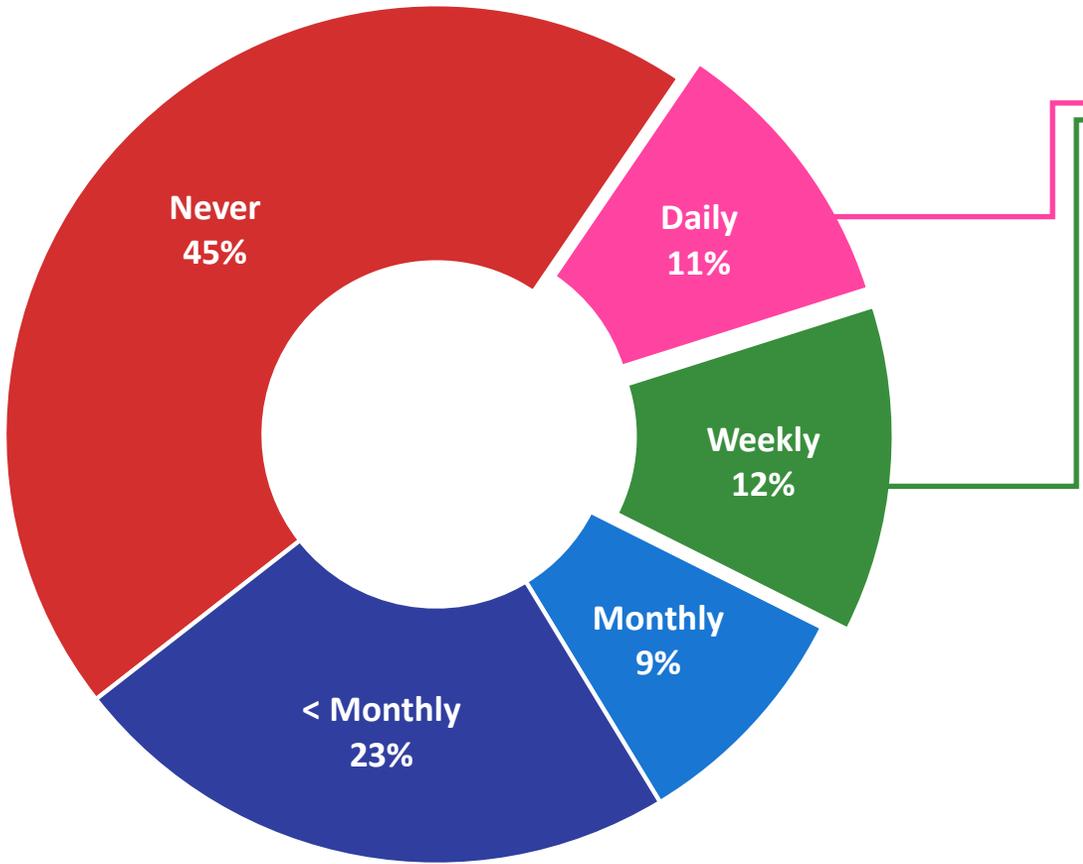
% who listen to any type of audio while working

AM/FM on a Regular Radio Continues to Be the Dominant At-Work Choice, But Broadcast Radio Streams Are a Factor, Too

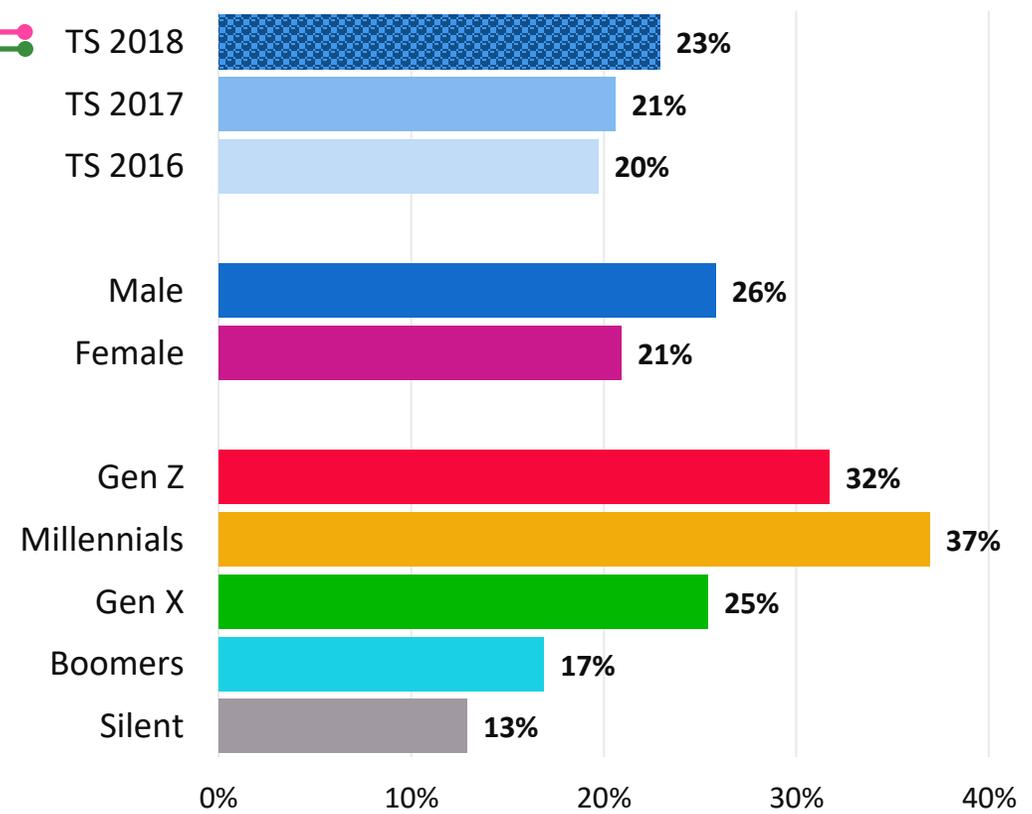


% of those who listen to any audio while working who "frequently" listen to each audio type while working (multiple responses accepted)

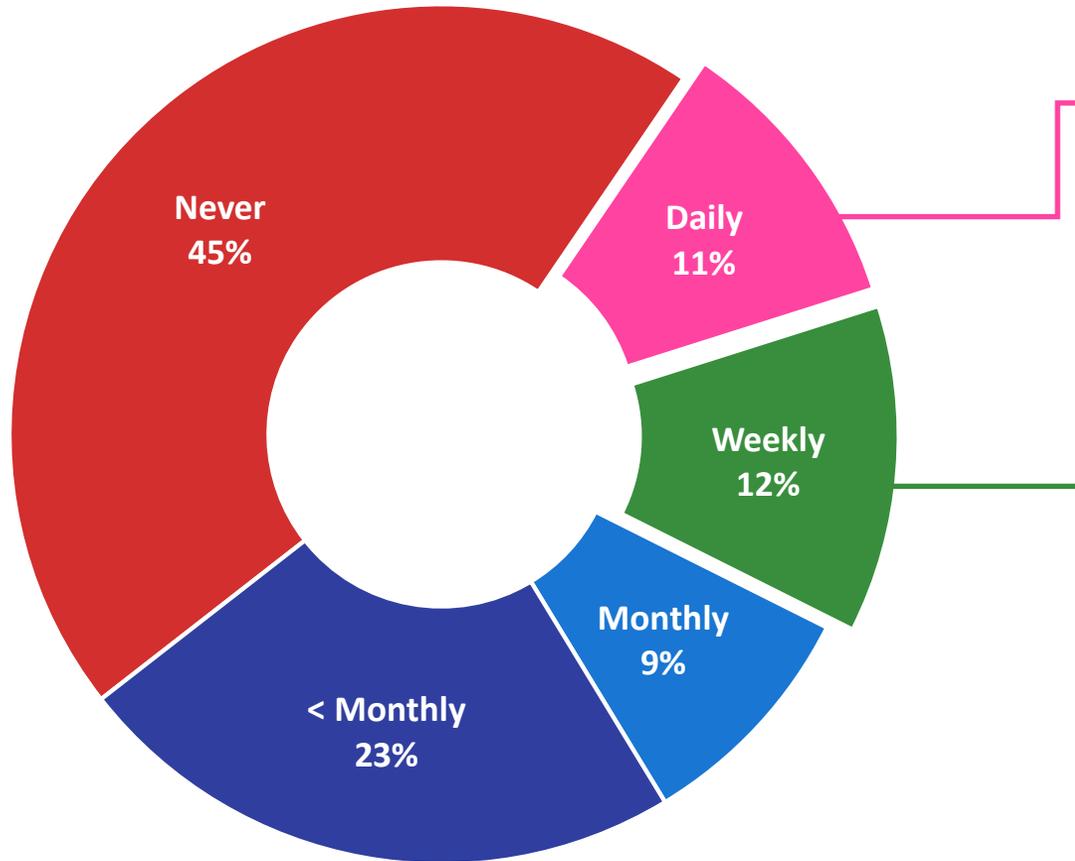
Led by Millennials, Weekly Podcast Listening Continues to Grow



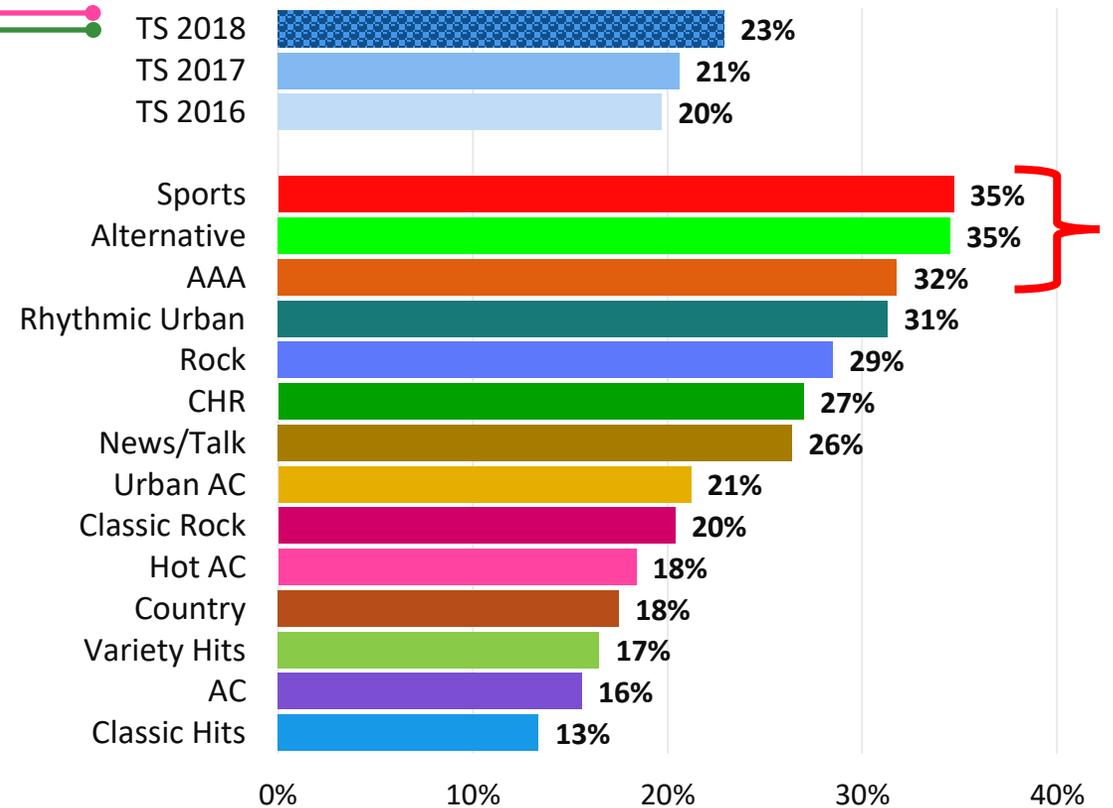
% Who Listen to Podcasts/On-Demand Audio Weekly or More



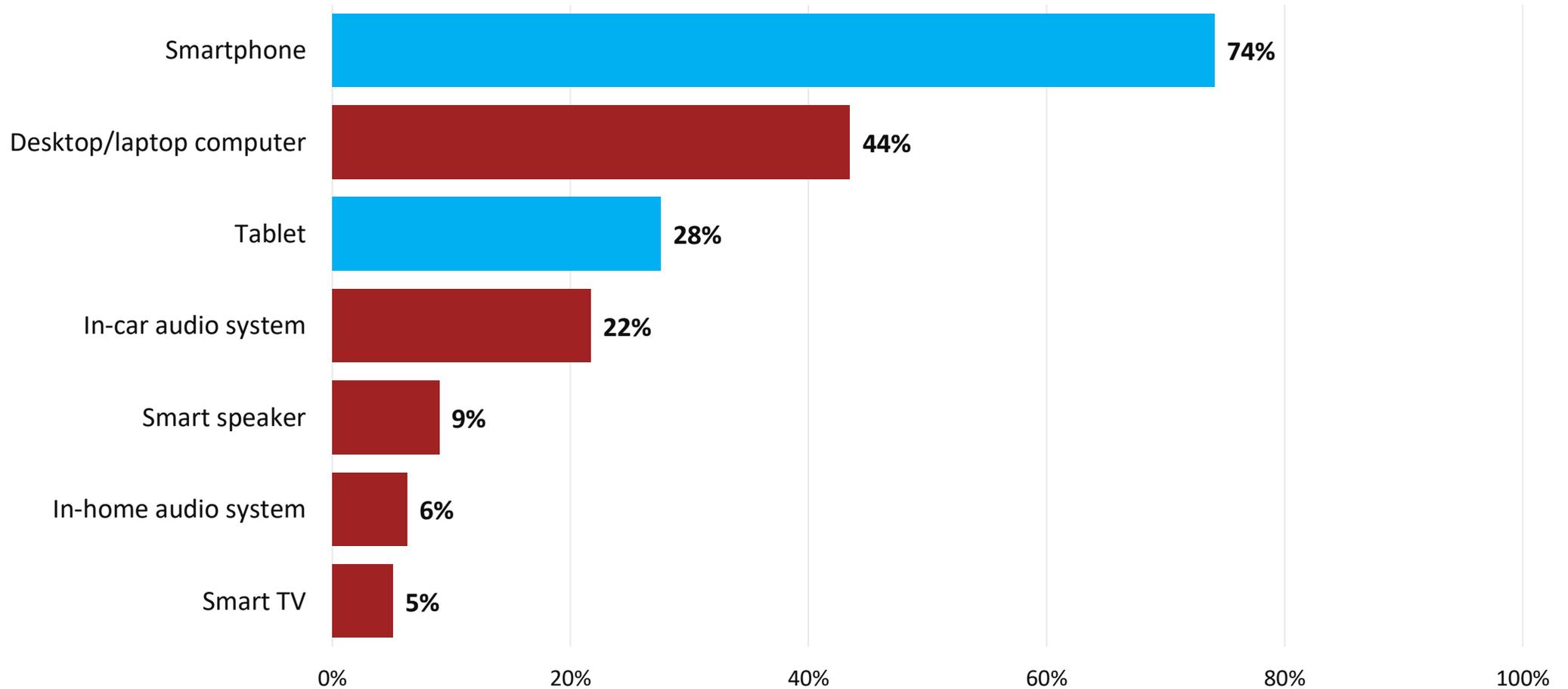
Sports Radio and Alternative Fans Lead the Way for Weekly Podcast Listening



% Who Listen to Podcasts/On-Demand Audio Weekly or More

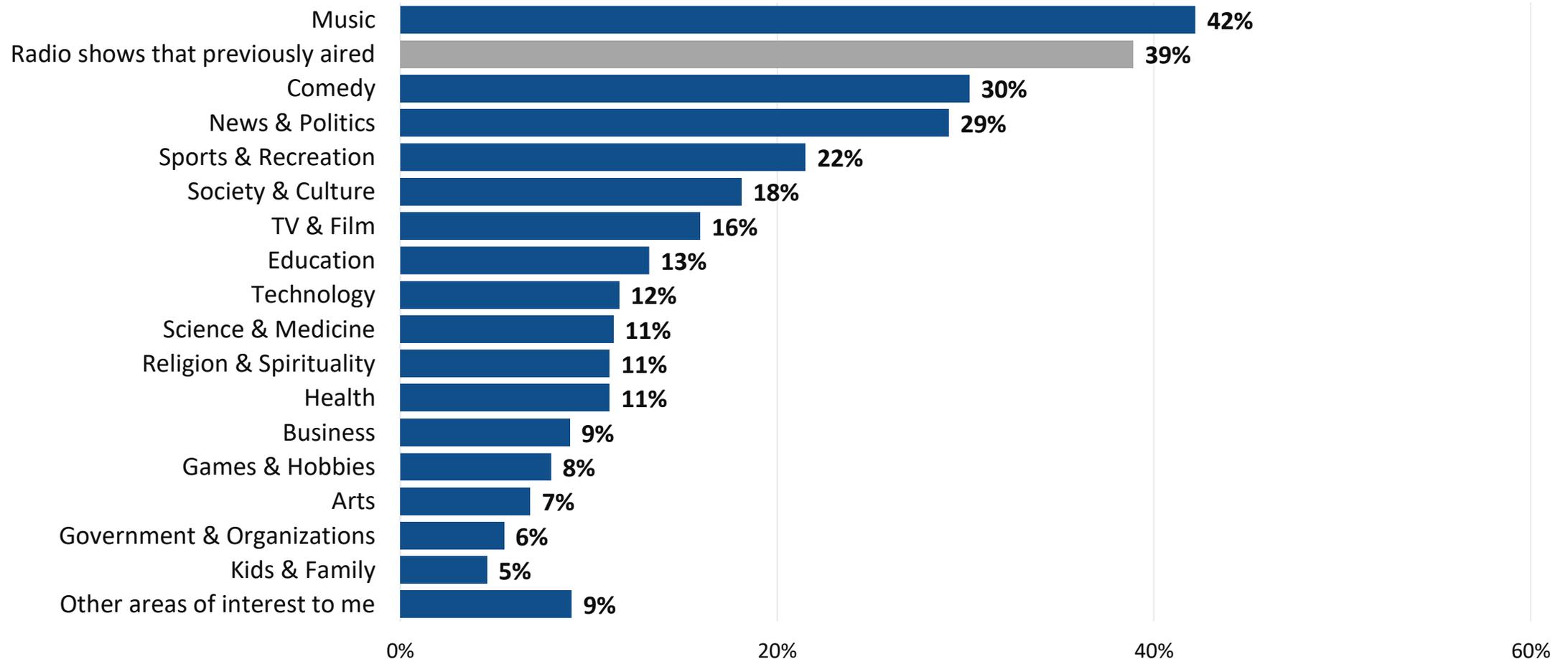


Three-Fourths of Weekly Podcast Listeners Regularly Listen on Their Smartphones



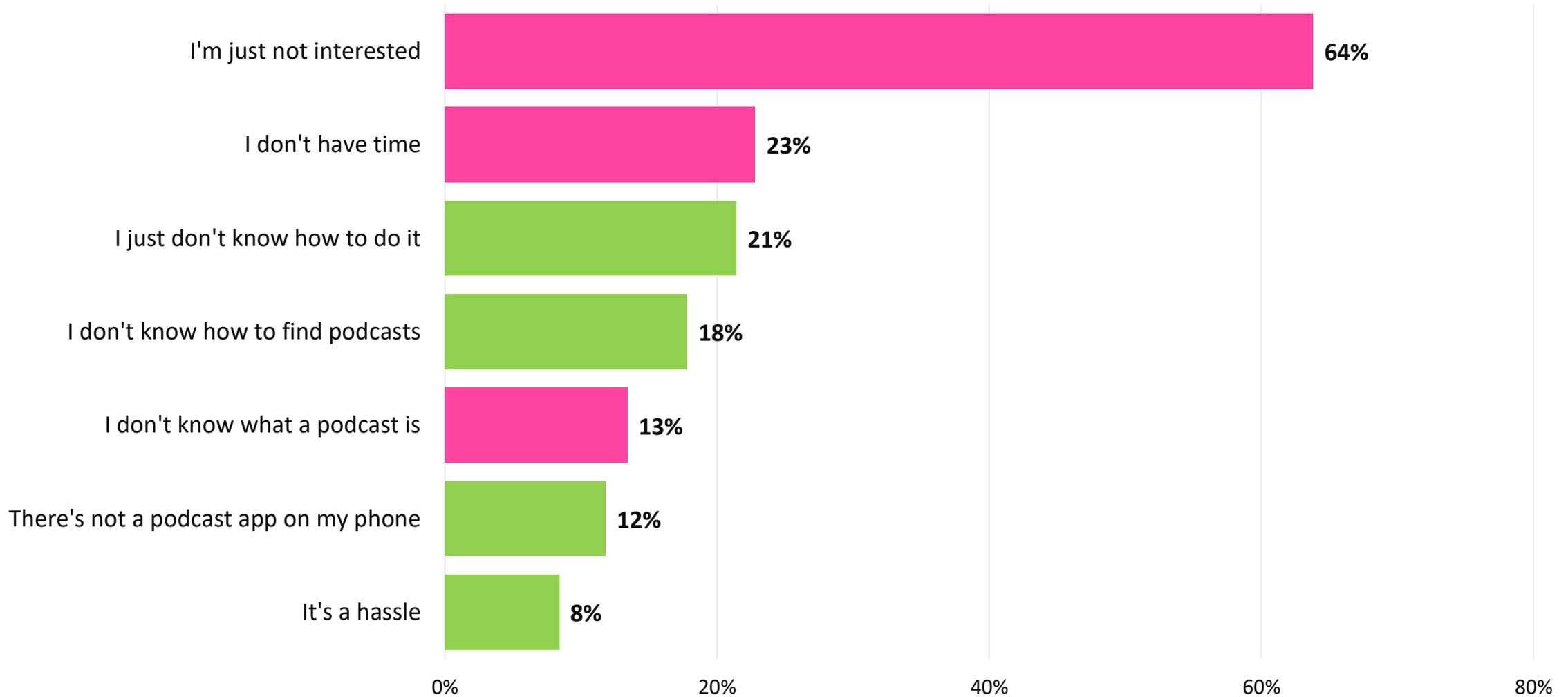
Among weekly podcast listeners, % who regularly listen to podcasts using each device

Music Podcasts and Radio Shows That Previously Aired Are the Most Regularly Listened to Podcast Categories



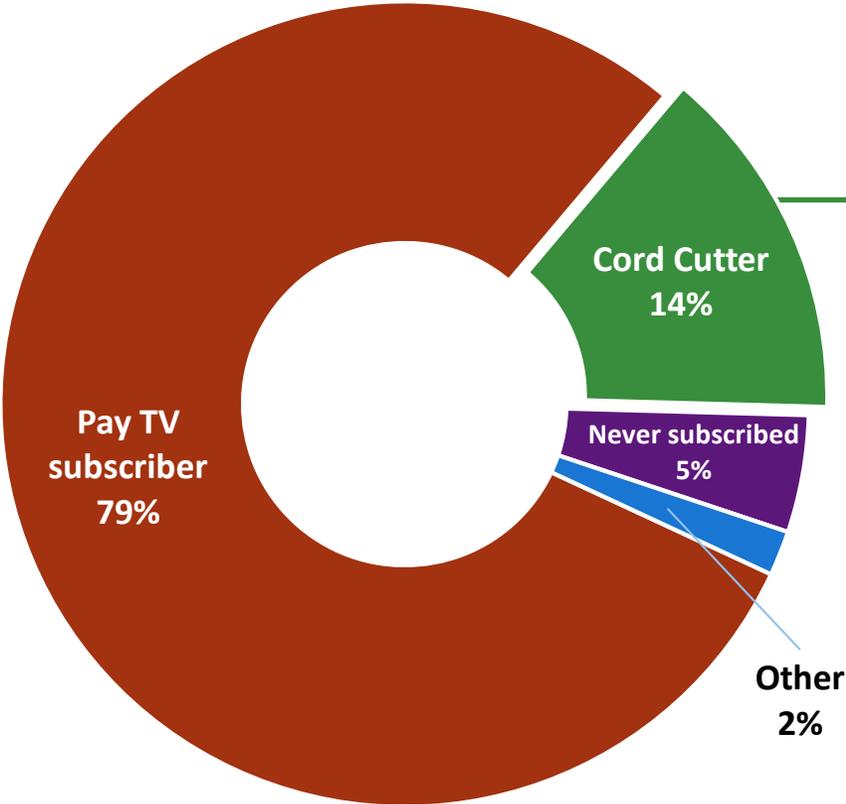
Among weekly podcast listeners, % who regularly listen to podcasts in each category

Top Reasons Why People Don't Listen to Podcasts

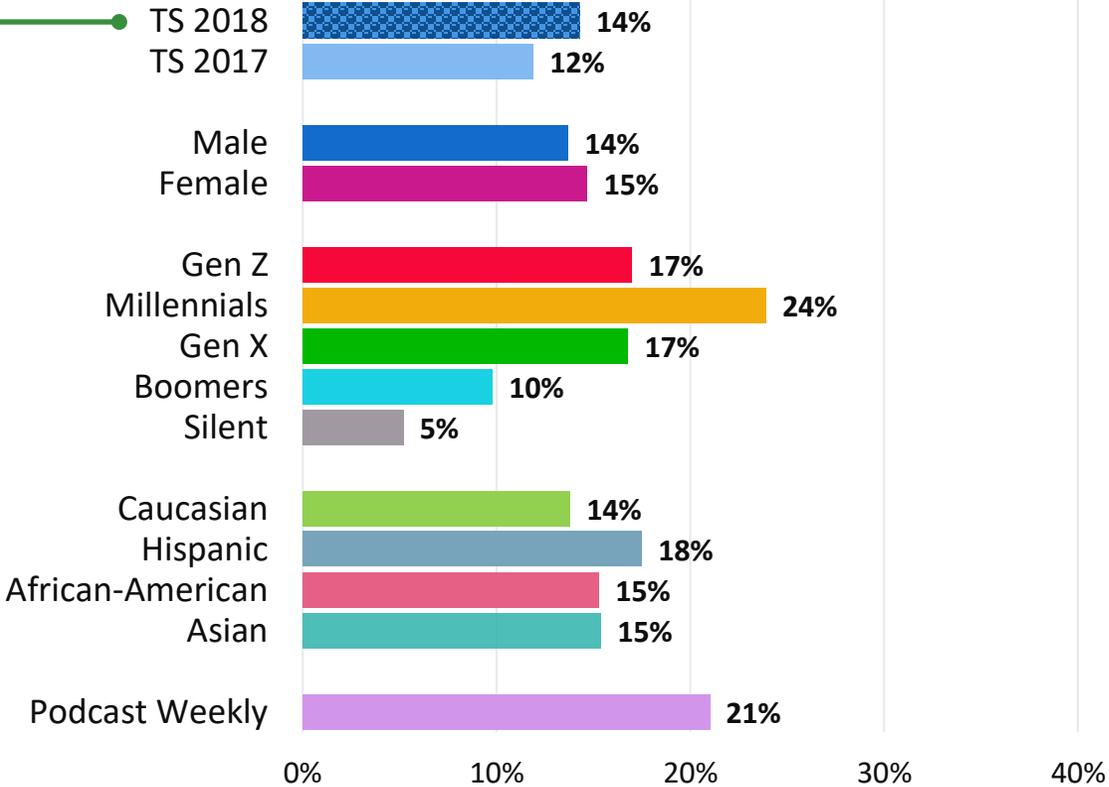


Among those who never listen to podcasts, % mentioning each as a reason they don't listen

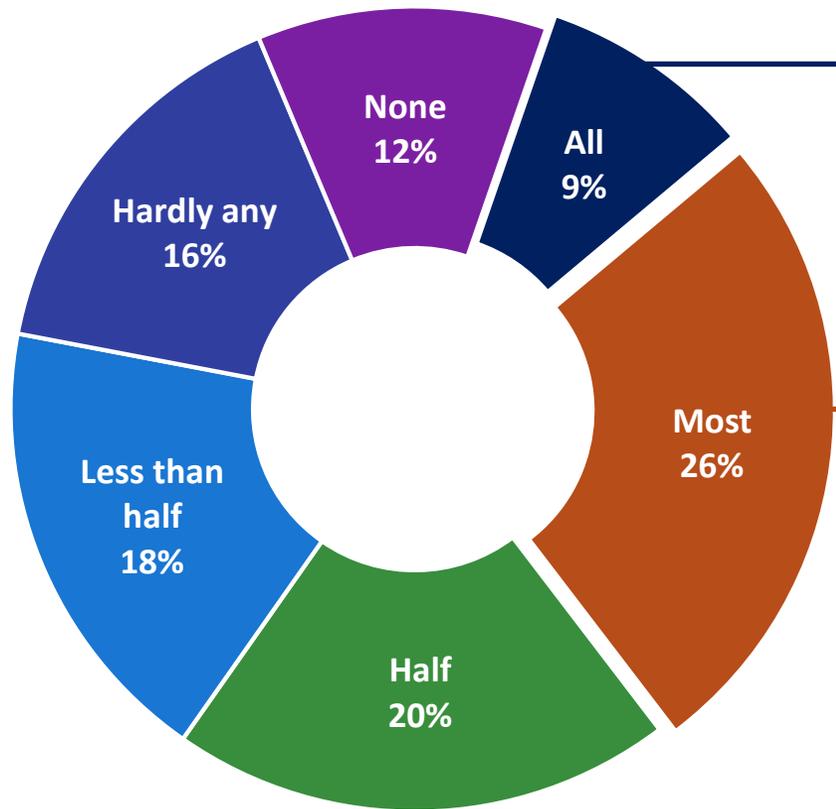
About One in Seven Overall Is a Cord Cutter, and One-Fourth of Millennials No Longer Pay for Television



% Who Used to be a Pay TV Subscriber But Do Not Currently Subscribe

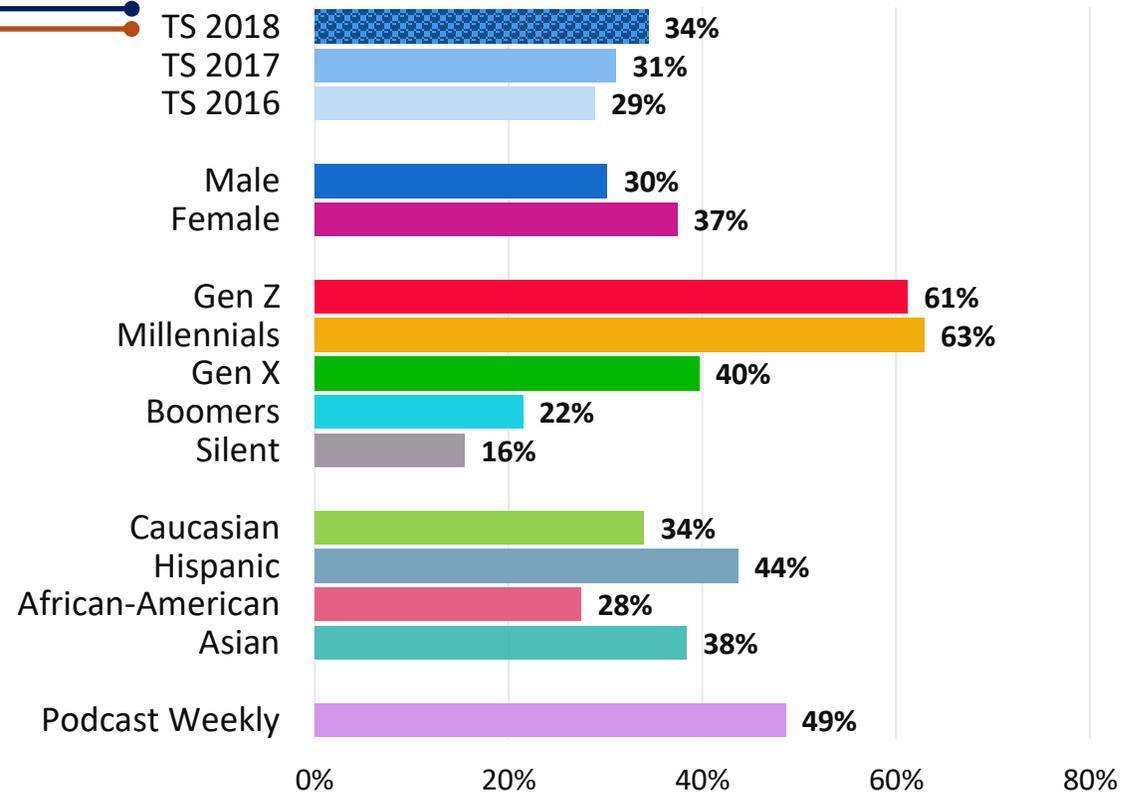


More Than One-Third Say All or Most of Their TV/Video Viewing Is On-Demand, Led by Gen Z & Millennials

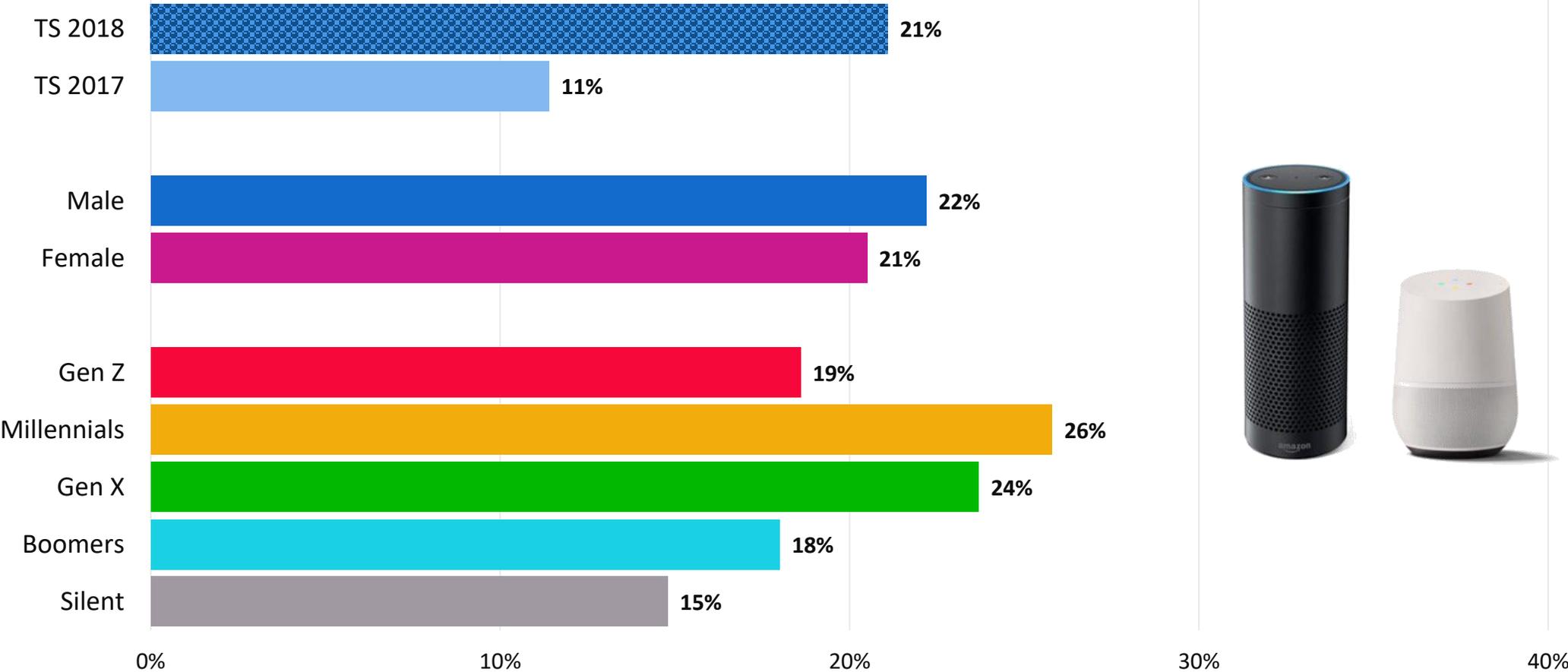


“What percentage of your overall TV or other video viewing takes place on-demand – using a DVR, on-demand video, or a service like Netflix or Hulu?”

% Saying “All” or “Most” TV/Video Viewing is On-Demand



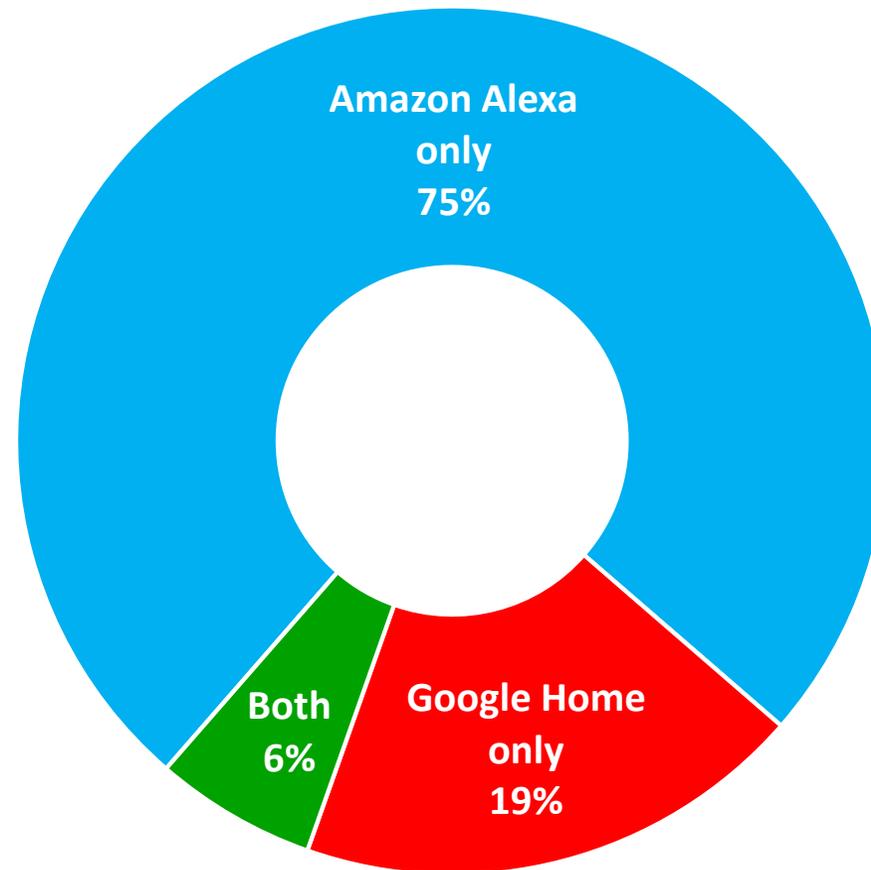
Smart Speaker Ownership Has Nearly Doubled in the Past Year



% who own a smart speaker (Amazon Alexa, Google Home, etc.)

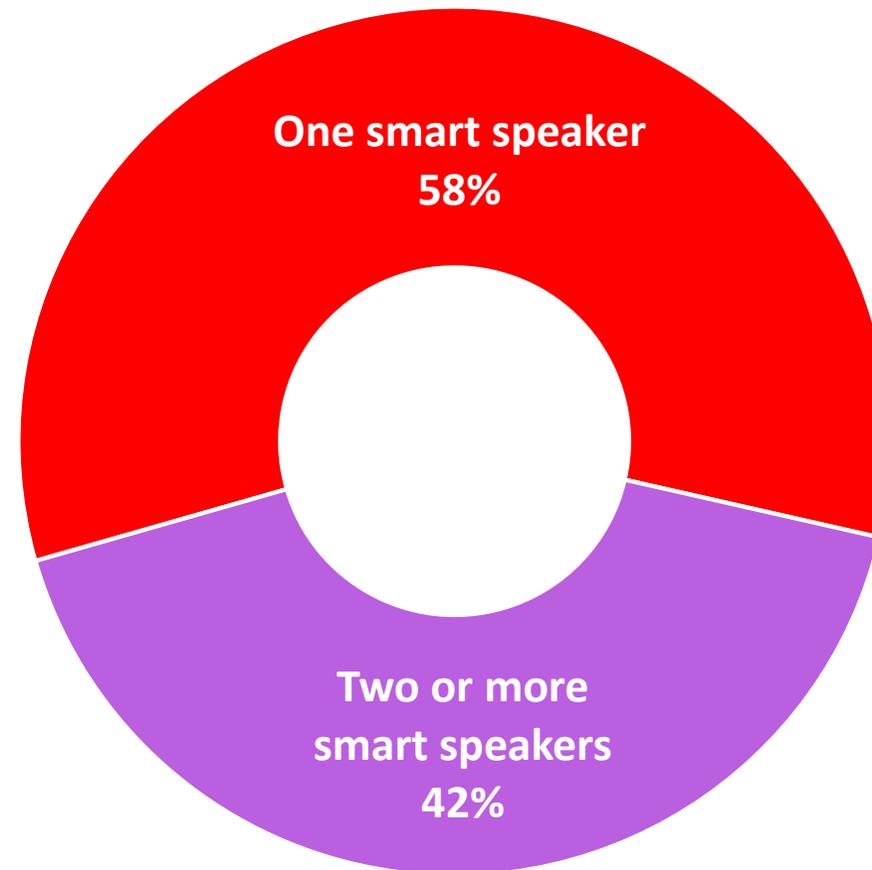
Amazon Alexa Dominates the Smart Speaker Landscape

% of Smart Speaker Owners Who Own...



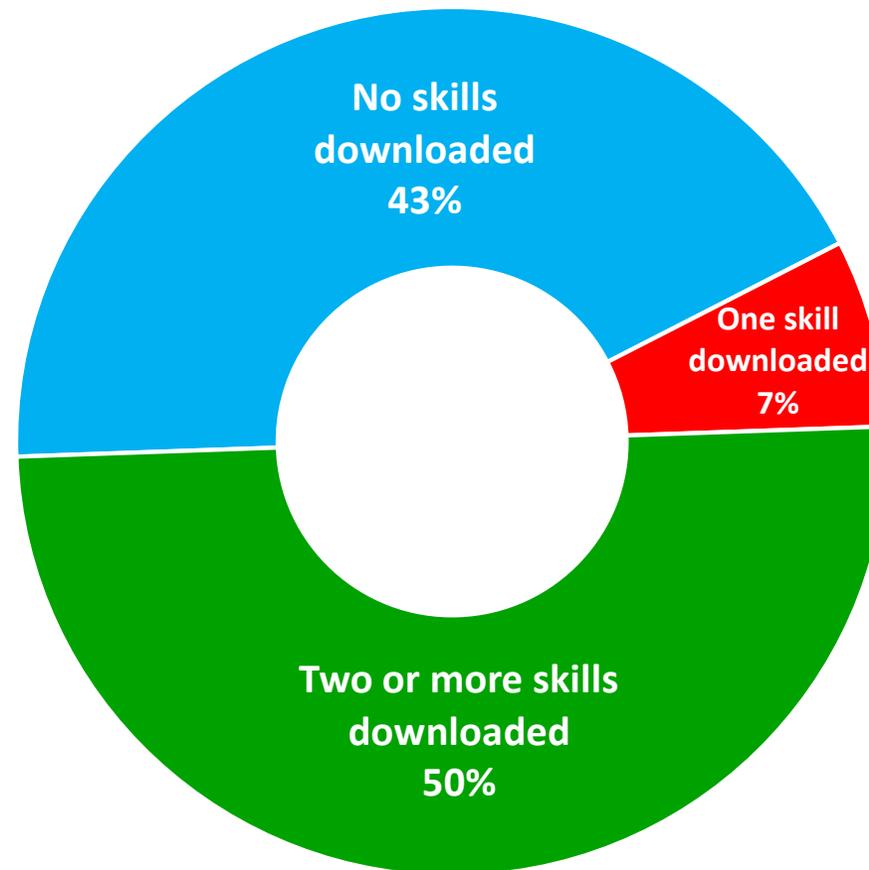
More Than Four in Ten Smart Speaker Owners Own Two or More of These Voice-Controlled Devices

% of Smart Speaker Owners Who Own...

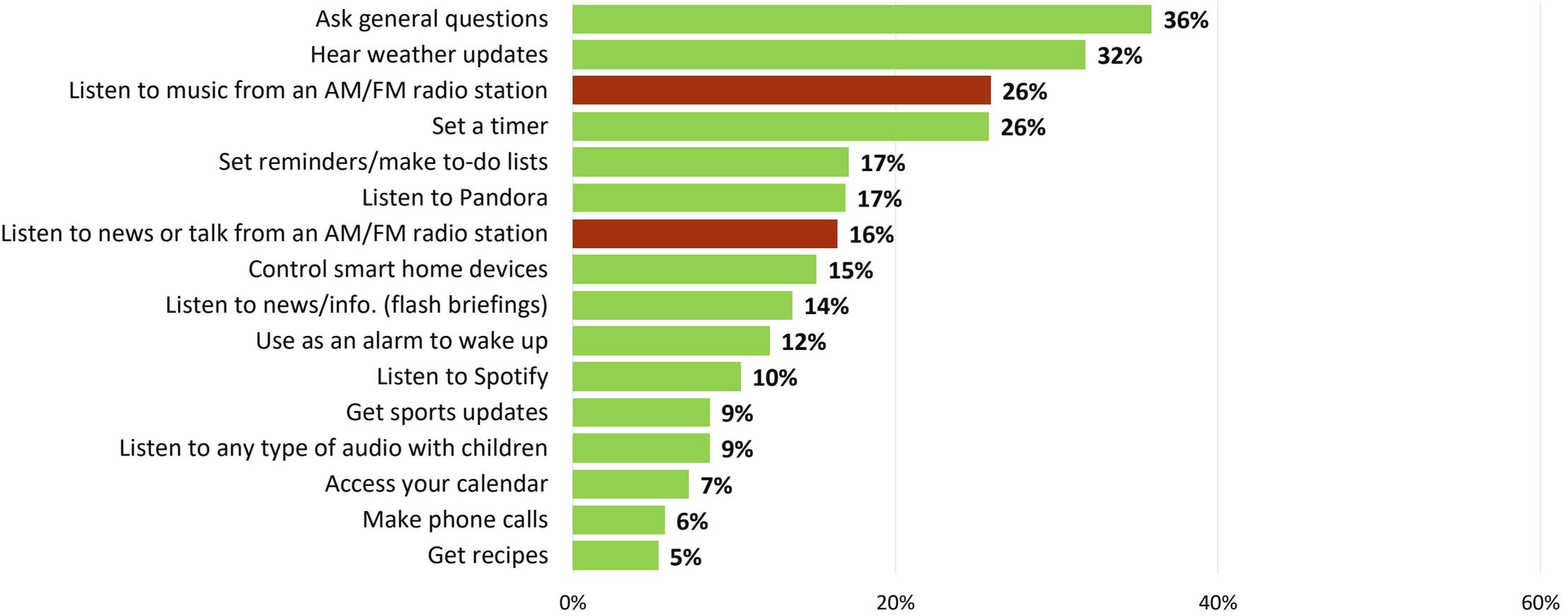


Among Amazon Alexa Owners, More Than Four in Ten Have *Not* Downloaded at Least One Alexa Skill

of Alexa Skills Downloaded Among Amazon Alexa Smart Speaker Owners

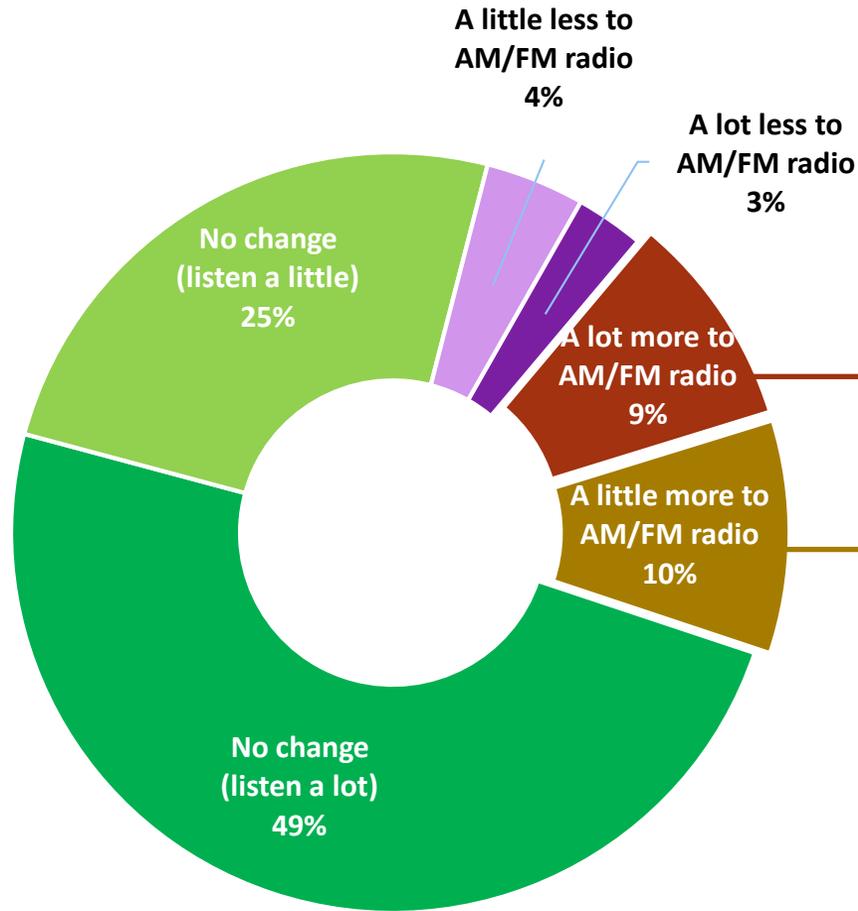


One-Fourth Frequently Listen to Music From AM/FM Radio on Their Smart Speaker(s); About One in Six Listen Often for News/Talk

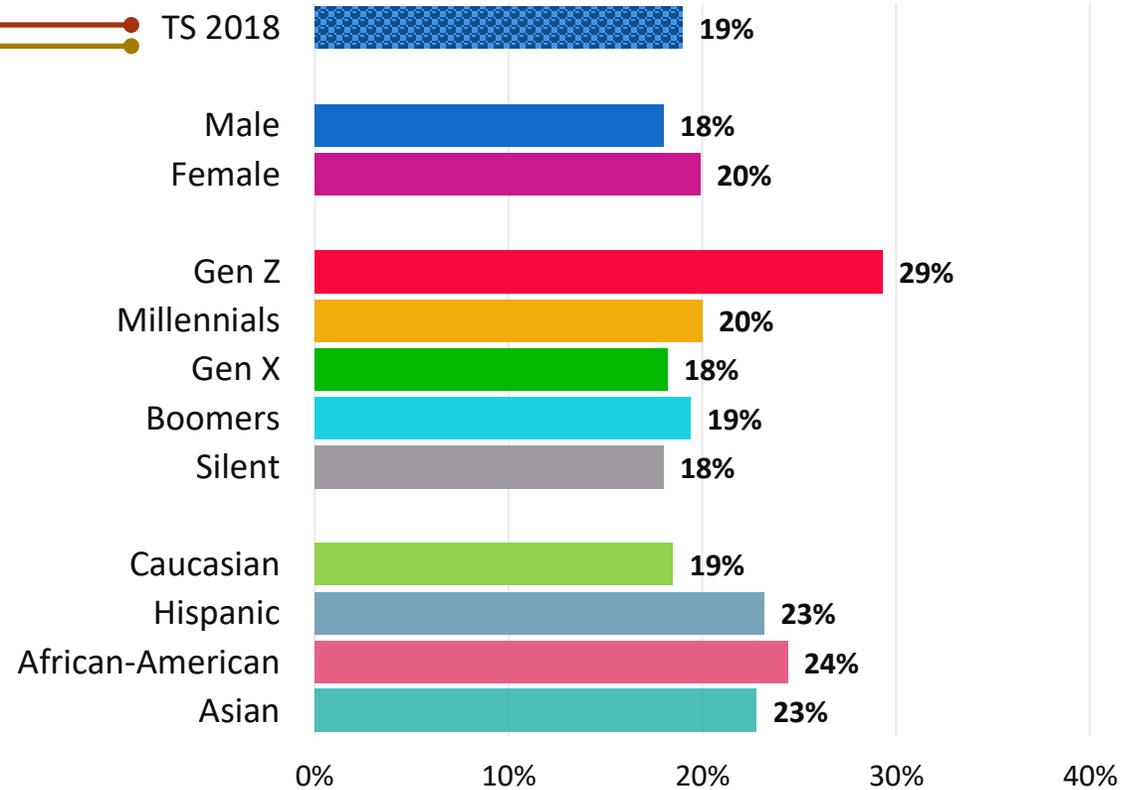


% of smart speaker owners who "frequently" use their device(s) in each way (most mentioned uses; 5% or more)

Gen Z Most Apt to Listen to More AM/FM Radio Since Getting a Smart Speaker, But All Demos Show Solid Gains

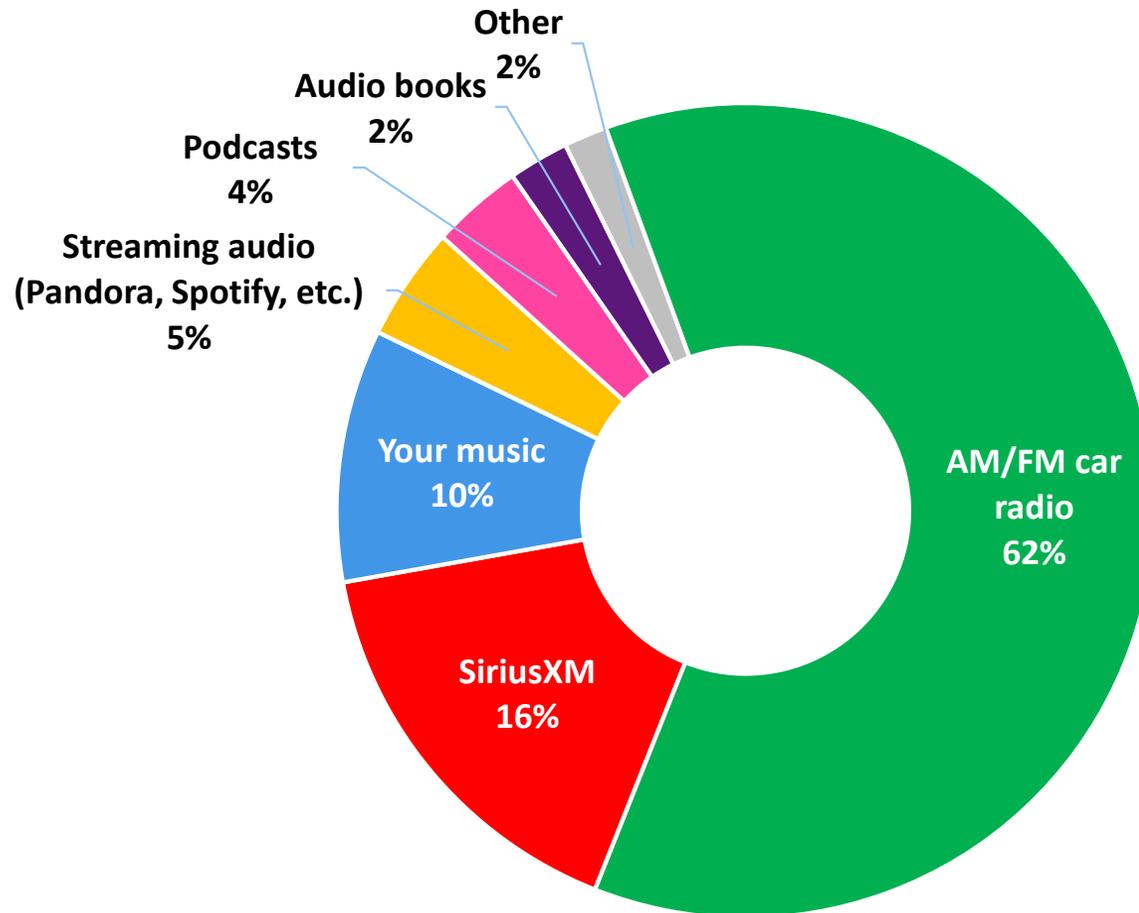


% Who Say They Are Listening to AM/FM Radio Stations More (A Lot + A Little) Since Getting a Smart Speaker

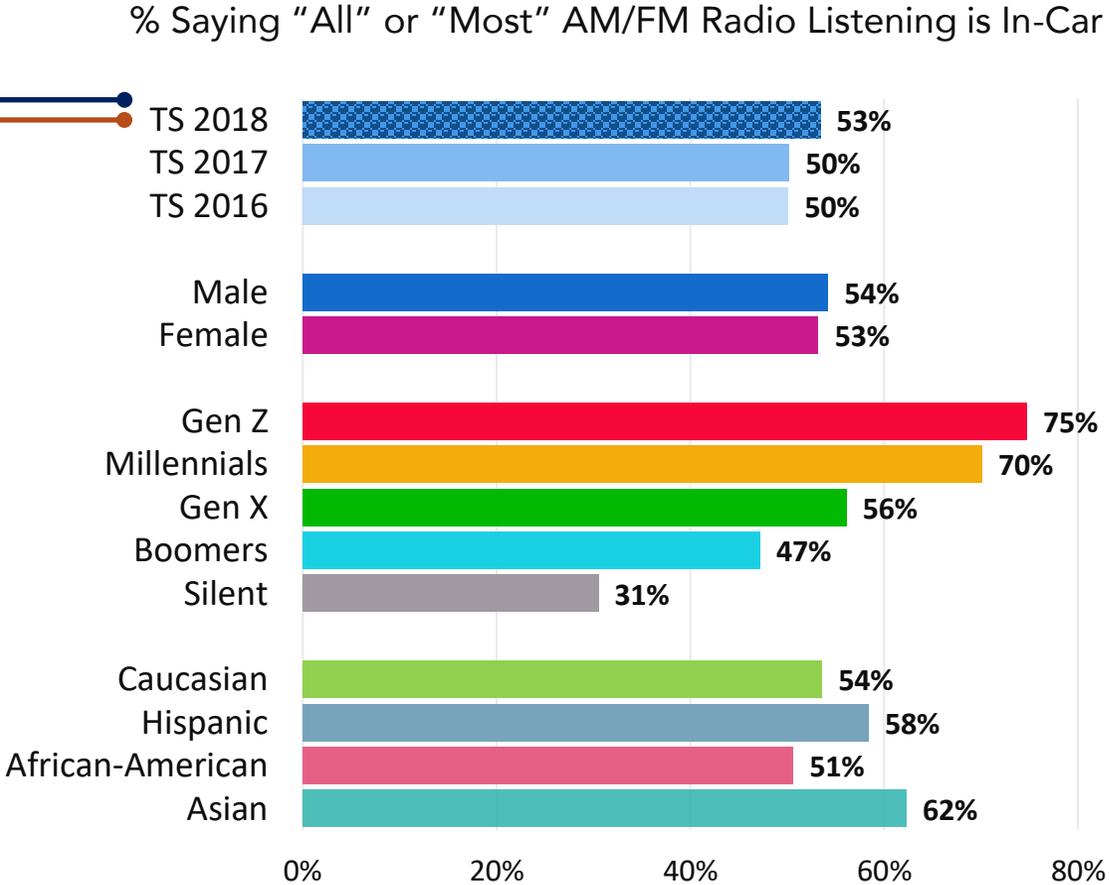
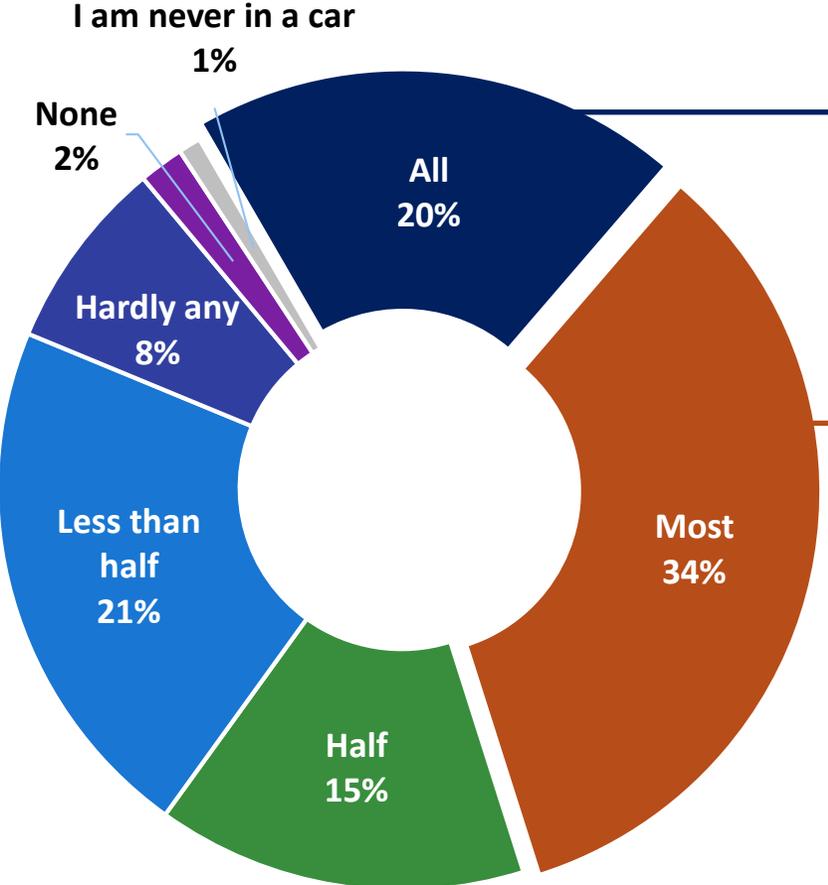


"How has your listening to AM/FM radio stations changed overall since you got a smart speaker?"

On An Average Weekday, AM/FM Radio Has A 62% Share of In-Car Media Use; Satellite Radio Is Next With a 16-share

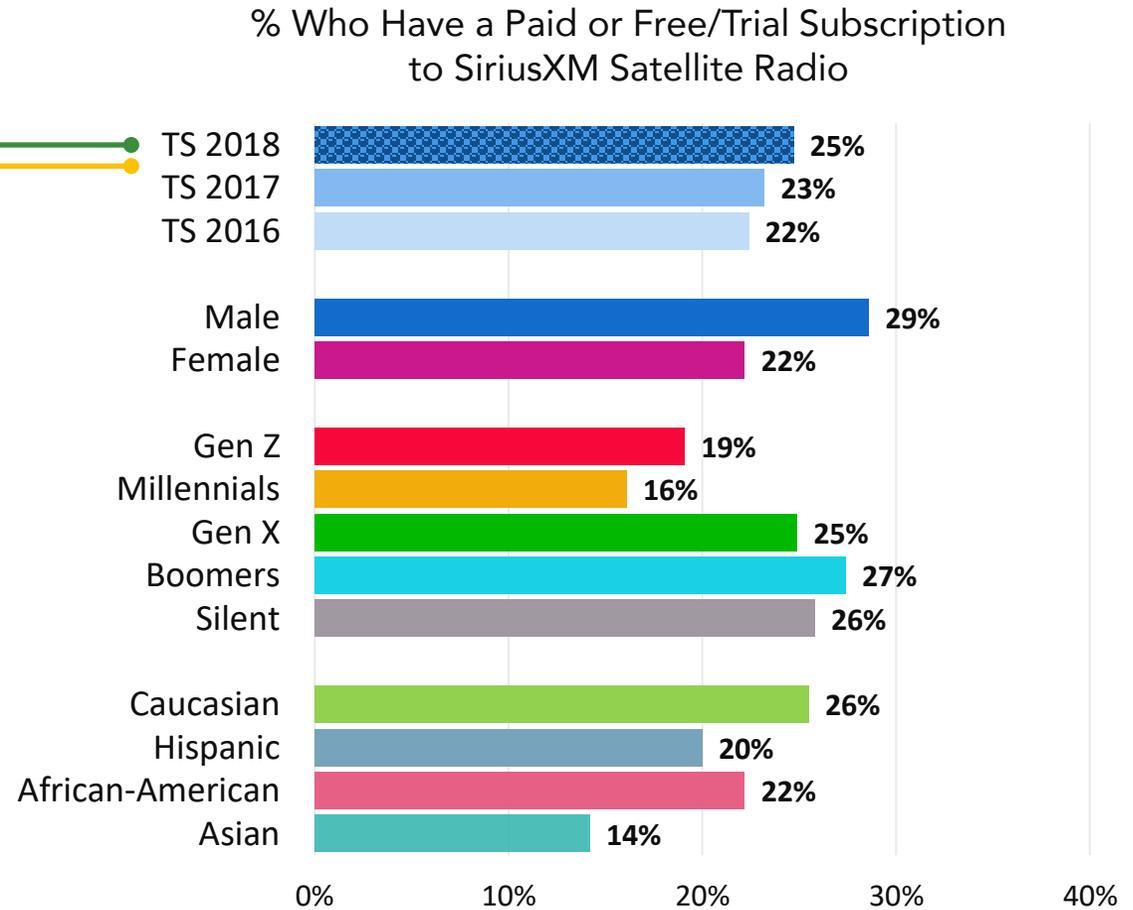
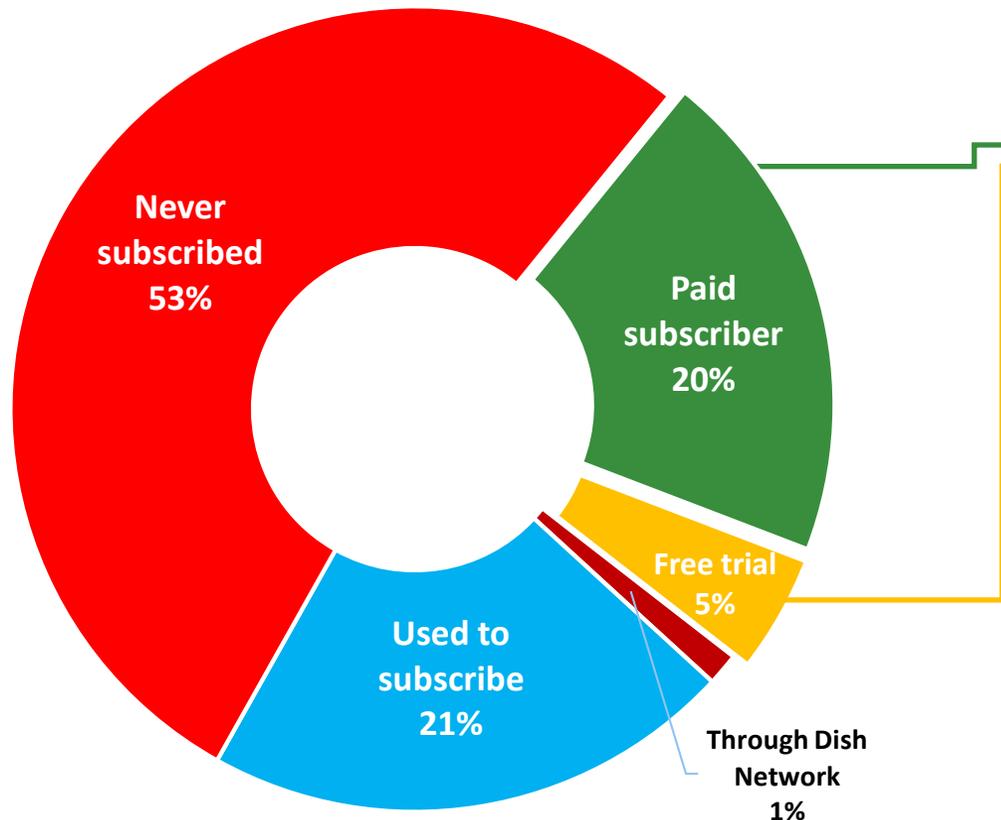


More Than Half of Listeners Say All or Most of Their AM/FM Radio Listening Is In-Car; Highest Among Gen Z & Millennials

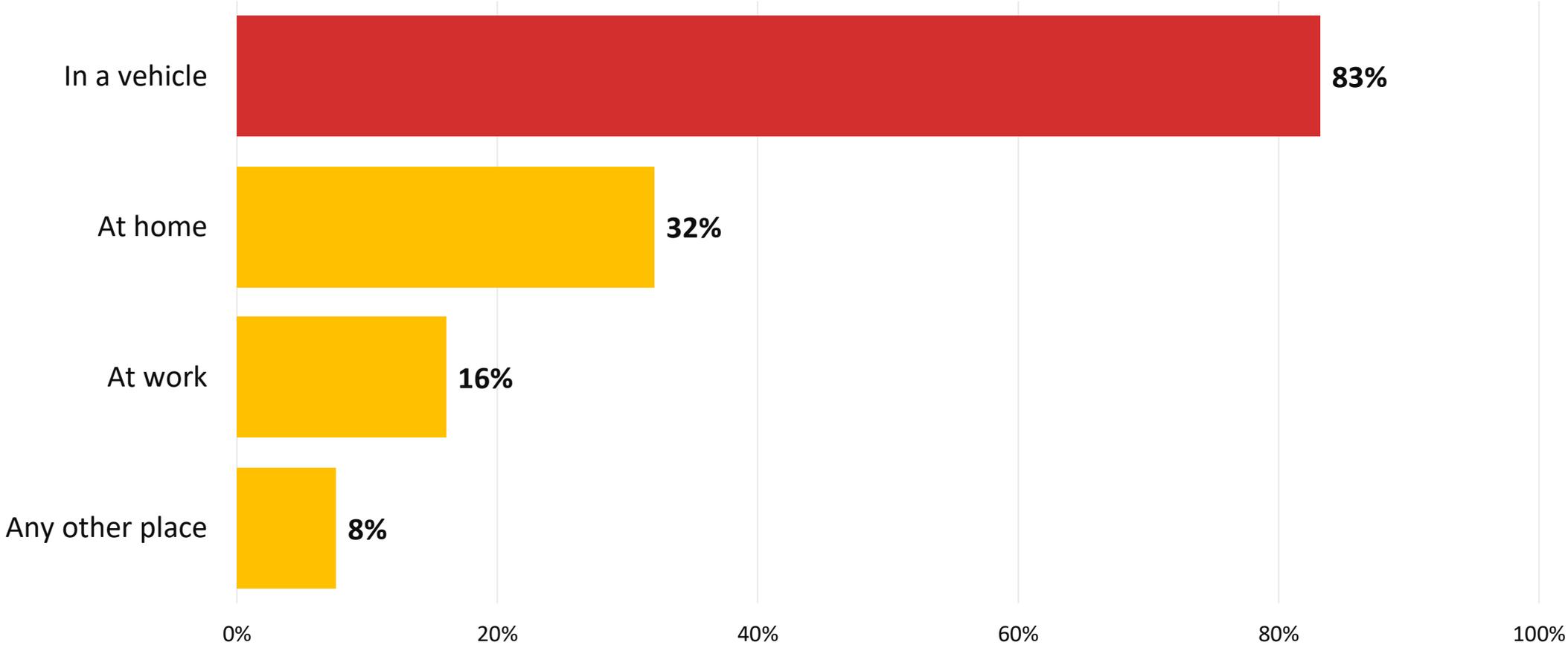


"During an average weekday, about how much of your total AM/FM radio listening time takes place in a car?"

SiriusXM Satellite Radio Now Reaches One in Four, With Men, Gen X, Boomers and Silents Leading the Way

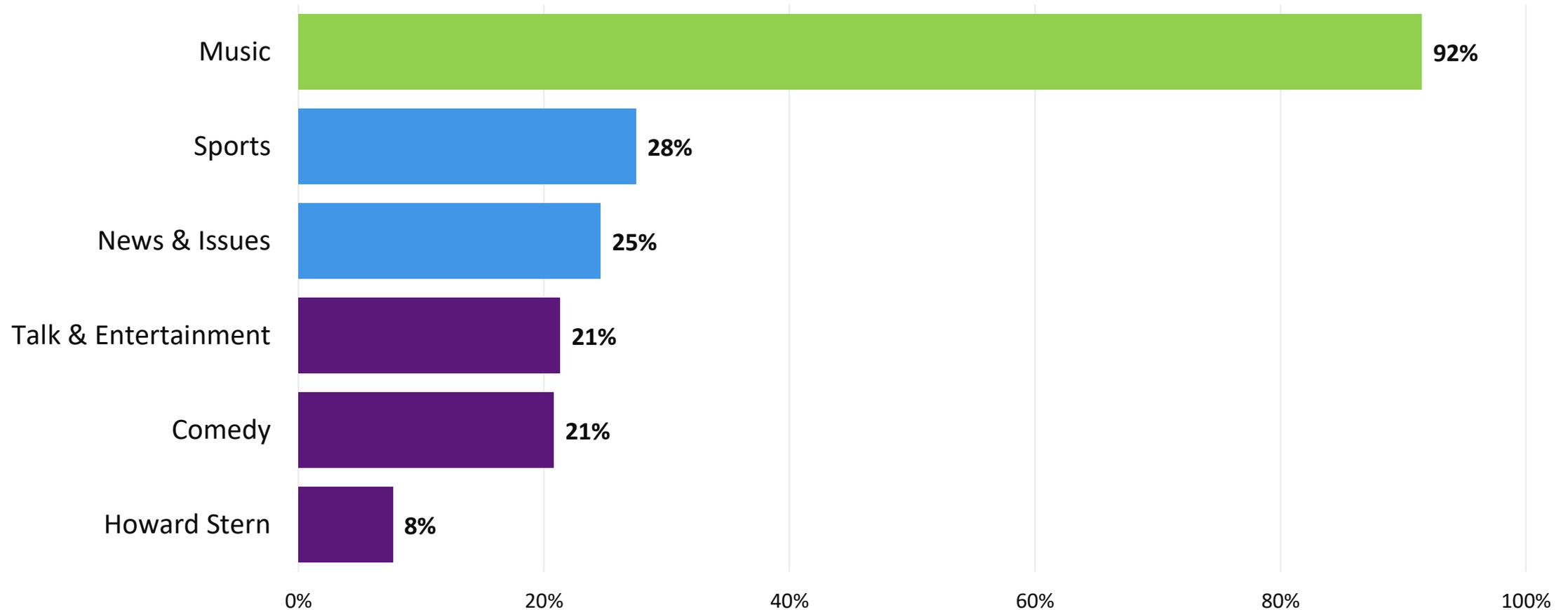


The Majority of SiriusXM Subscribers Listen to the Service in a Vehicle on an Average Weekday; One-Third Listen at Home



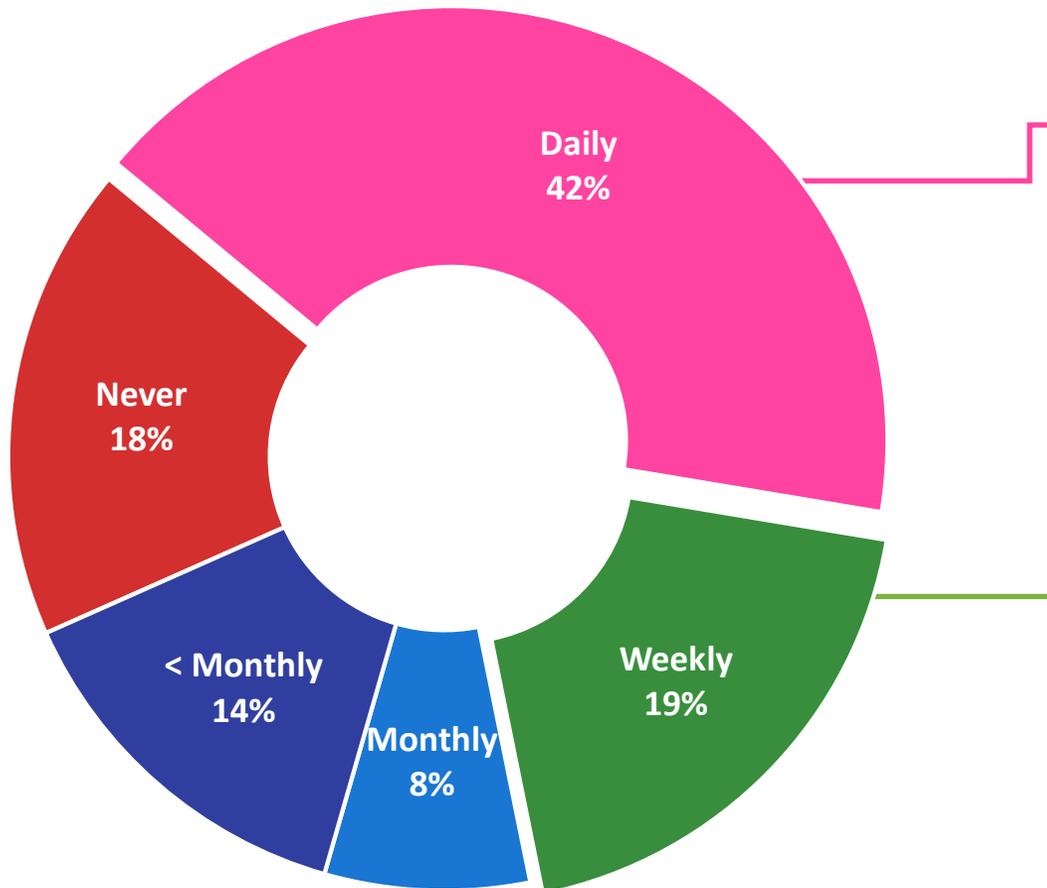
% of SiriusXM satellite radio paid or free/trial subscribers who listen to the service in each location on an average weekday

Nearly All SiriusXM Subscribers Listen to Music, But Sports and News Programming Also Resonate

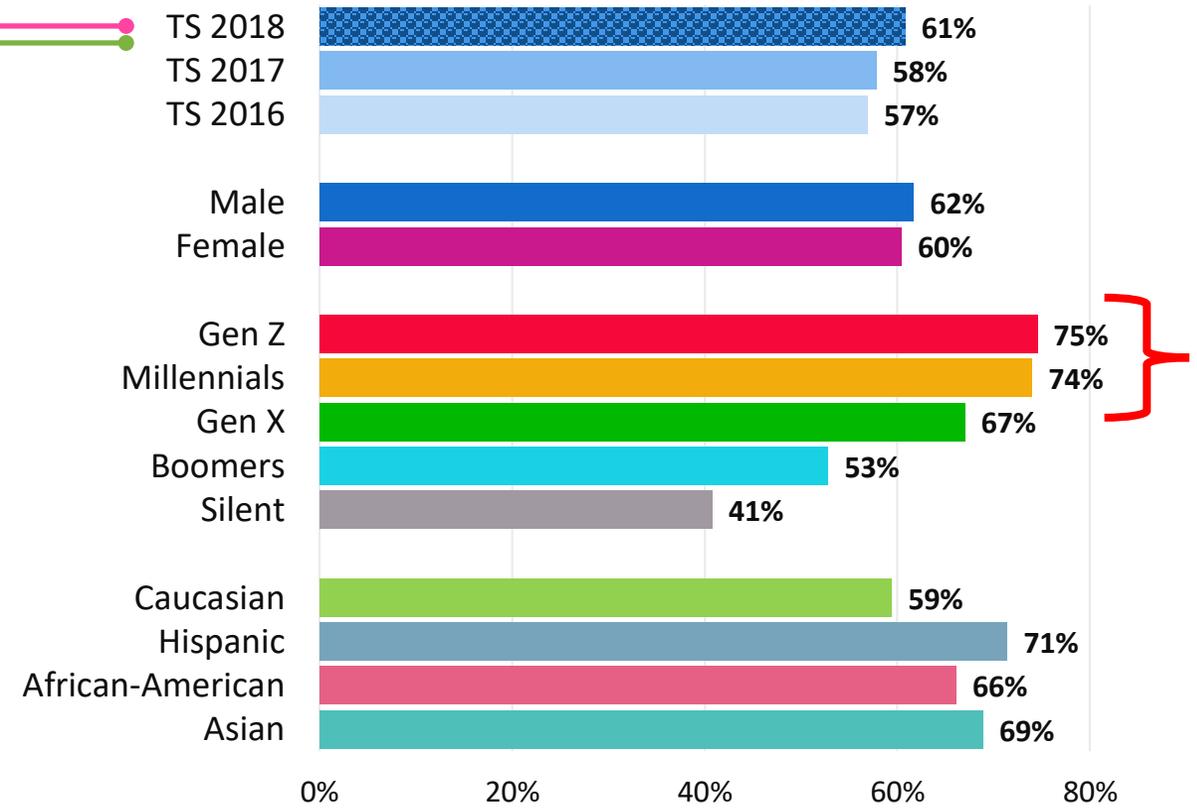


% of SiriusXM satellite radio paid or free/trial subscribers who regularly listen to audio type on the service

More Than Four in Ten Listen to Streaming Audio Daily; Weekly Usage Climbs Above Six in Ten

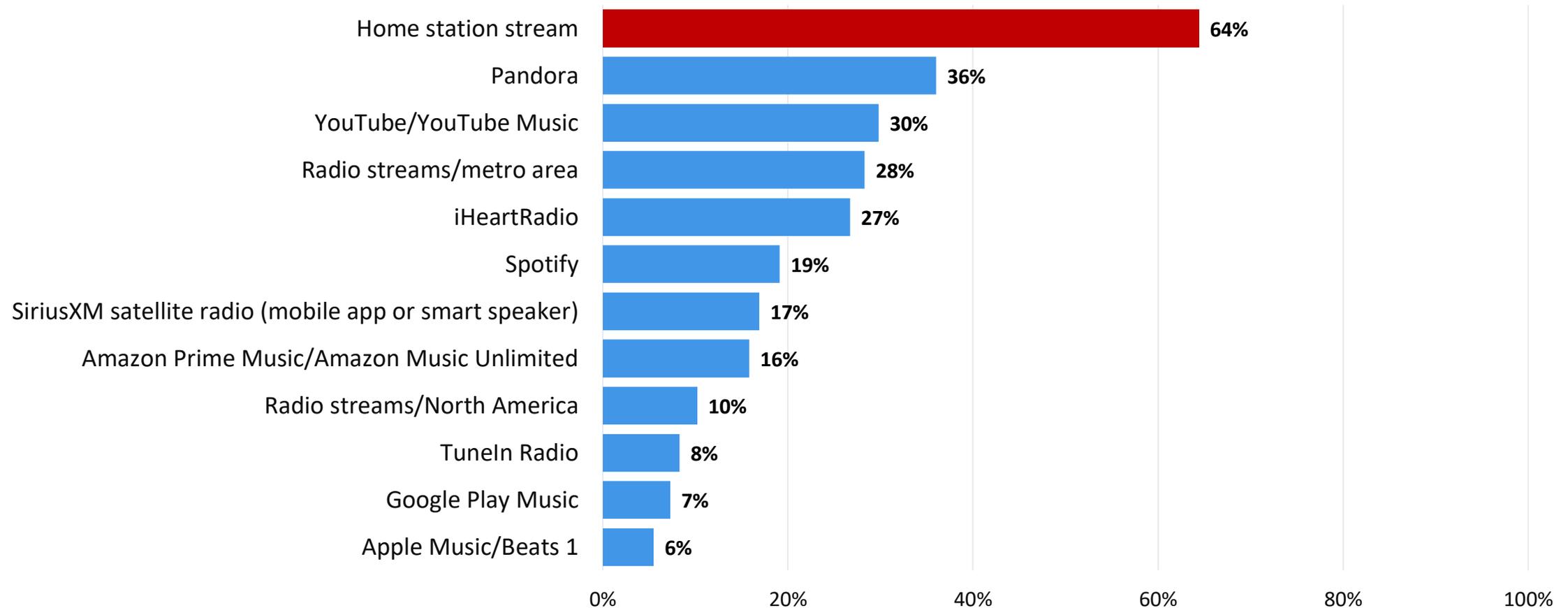


% Who Listen to Streaming Audio Weekly or More



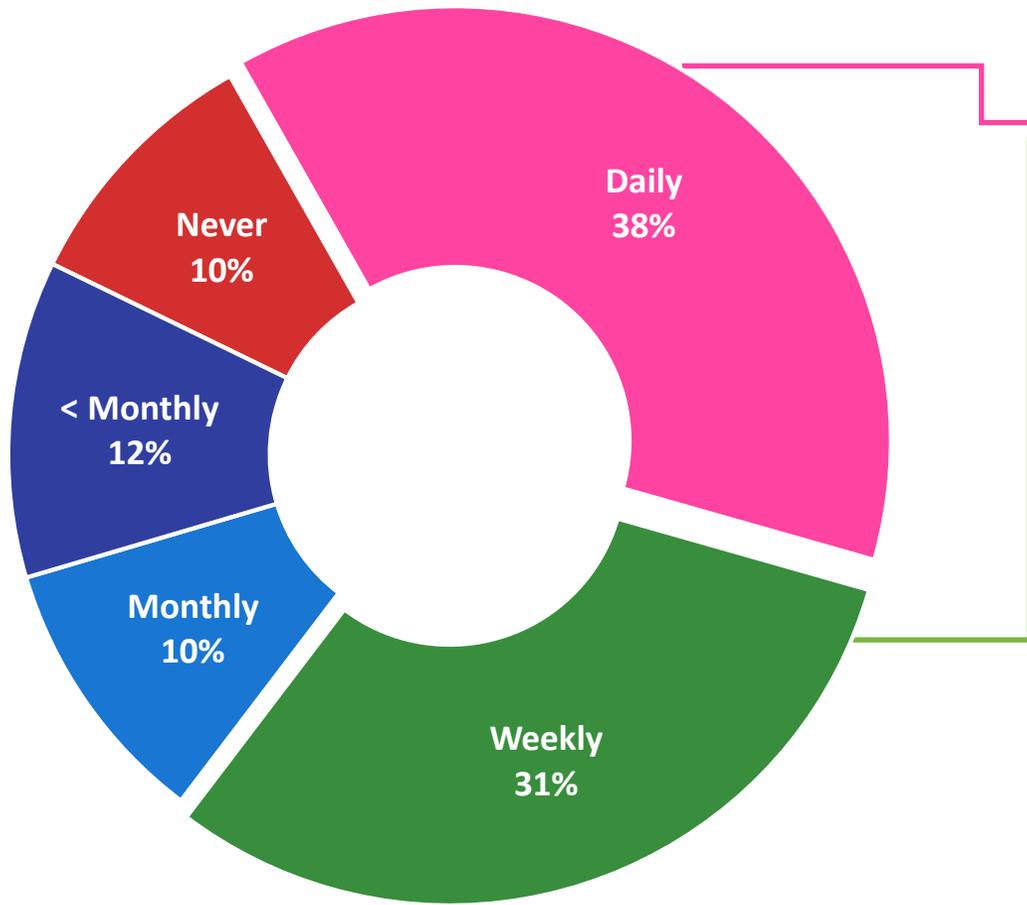
Just Under Two-Thirds Listen to Home Station's Stream, Far Ahead of Pandora, YouTube, Spotify, and iHeartRadio

% Who Listen to Each Streaming Audio Platform Weekly or More

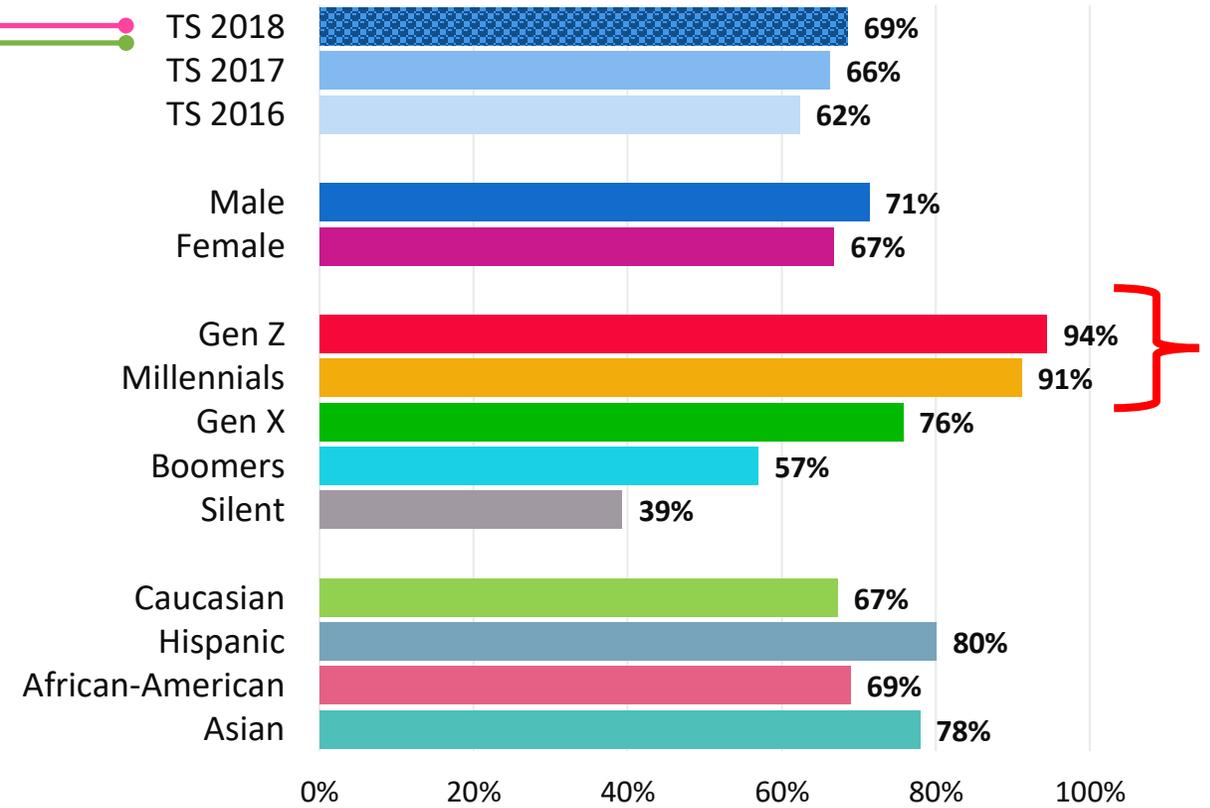


Among those who listen to streaming audio monthly or more (platforms 5% or greater shown)

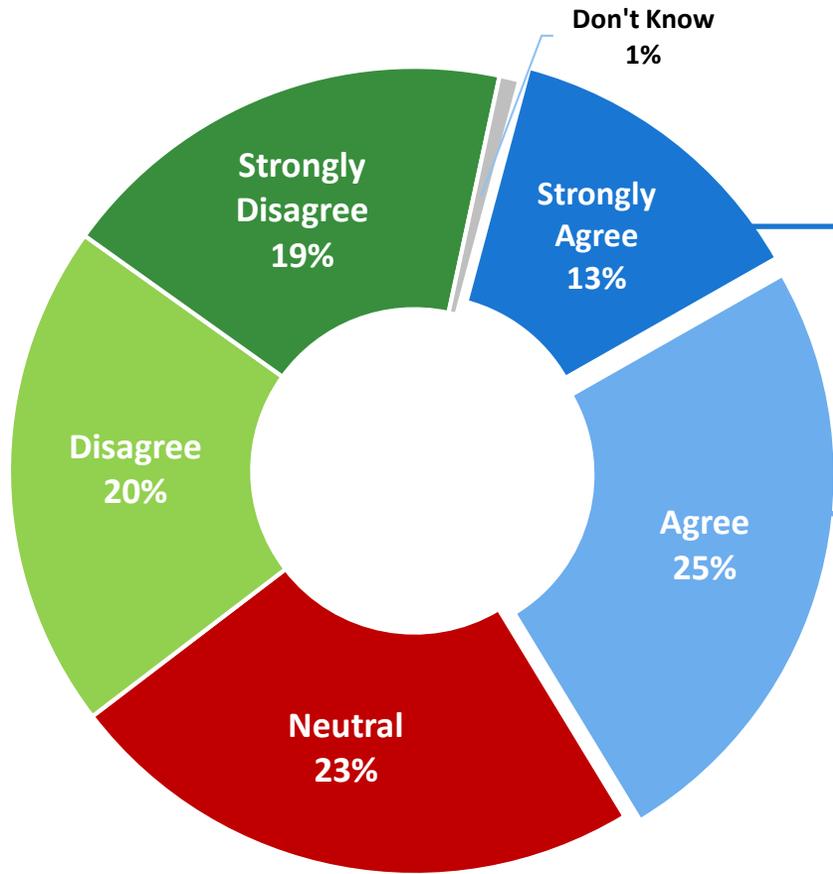
Nearly Four in Ten Watch Streaming Video Daily; Weekly Usage Is Now Nearly Seven in Ten



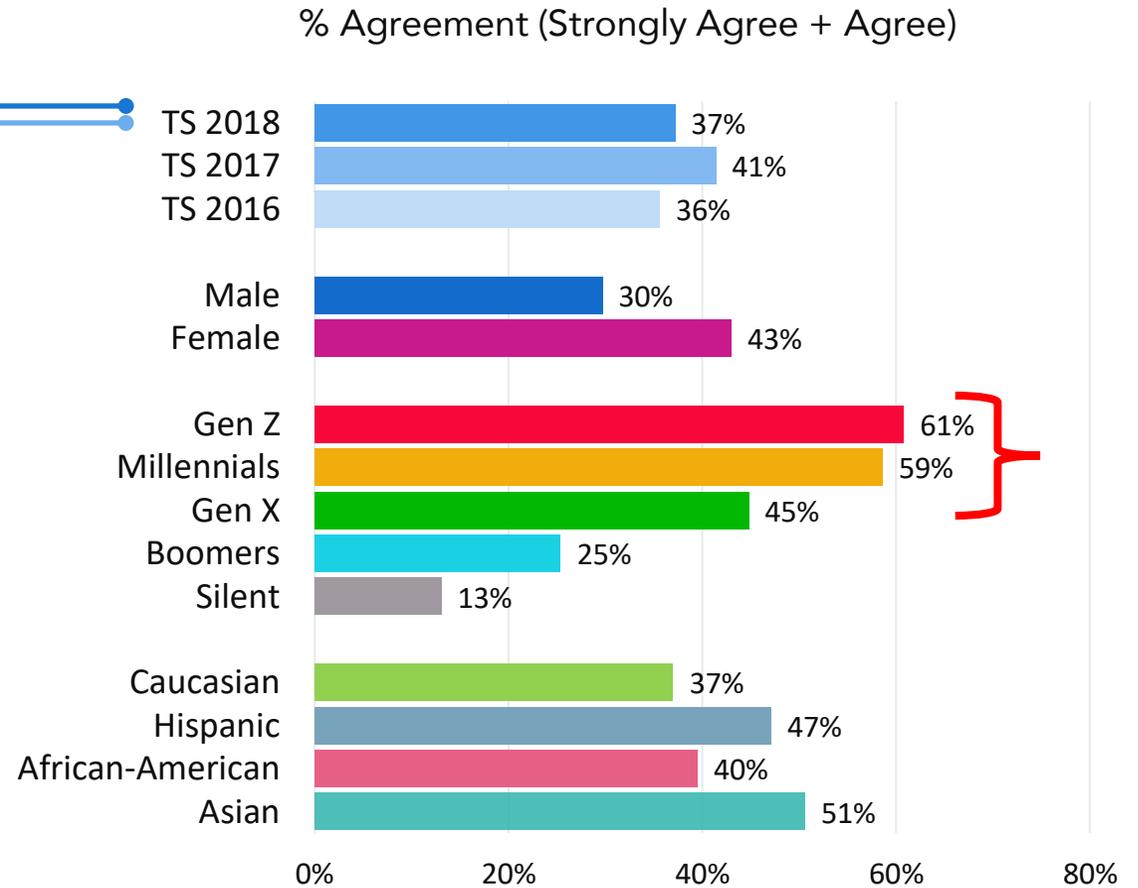
% Who Watch Streaming Video Weekly or More



Females, Gen Z and Millennials are Most Likely to Say (or Admit) They Are Addicted to Their Mobile Phone

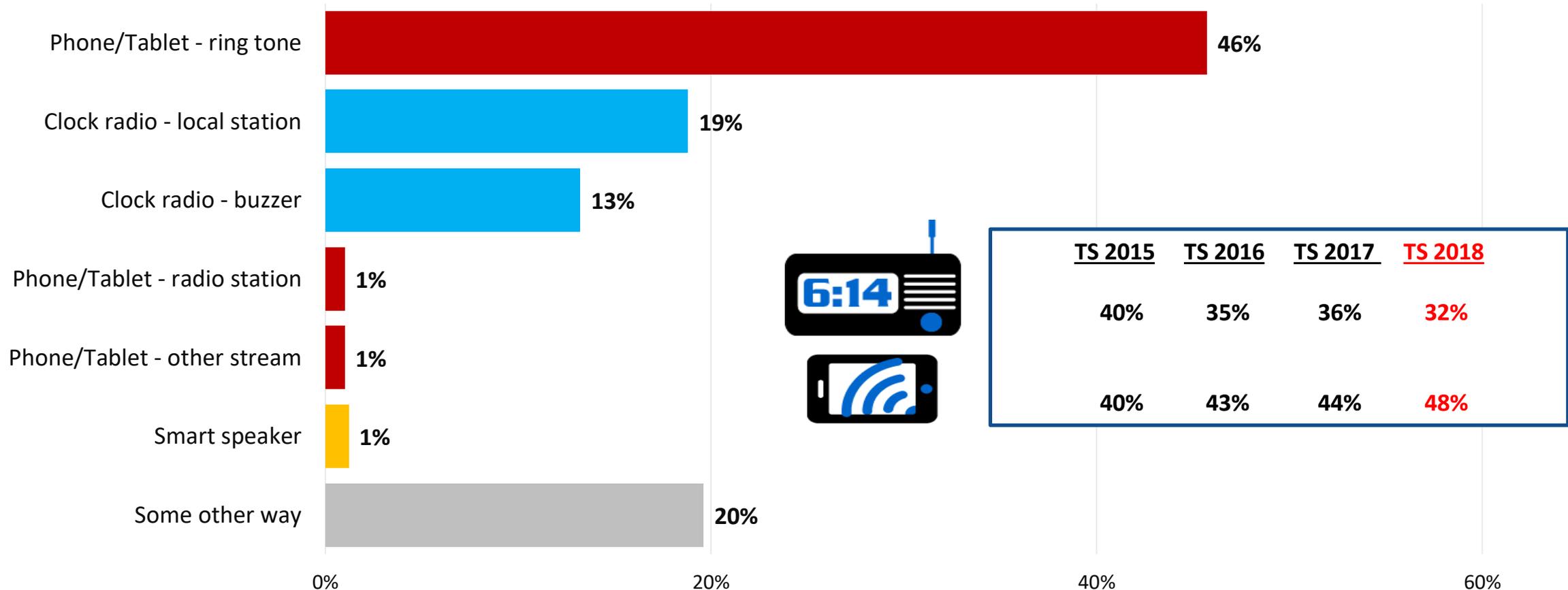


"I am addicted to my mobile phone"



Using a Mobile Device to Wake Up Is Increasing in Popularity, Specifically With a Ring Tone

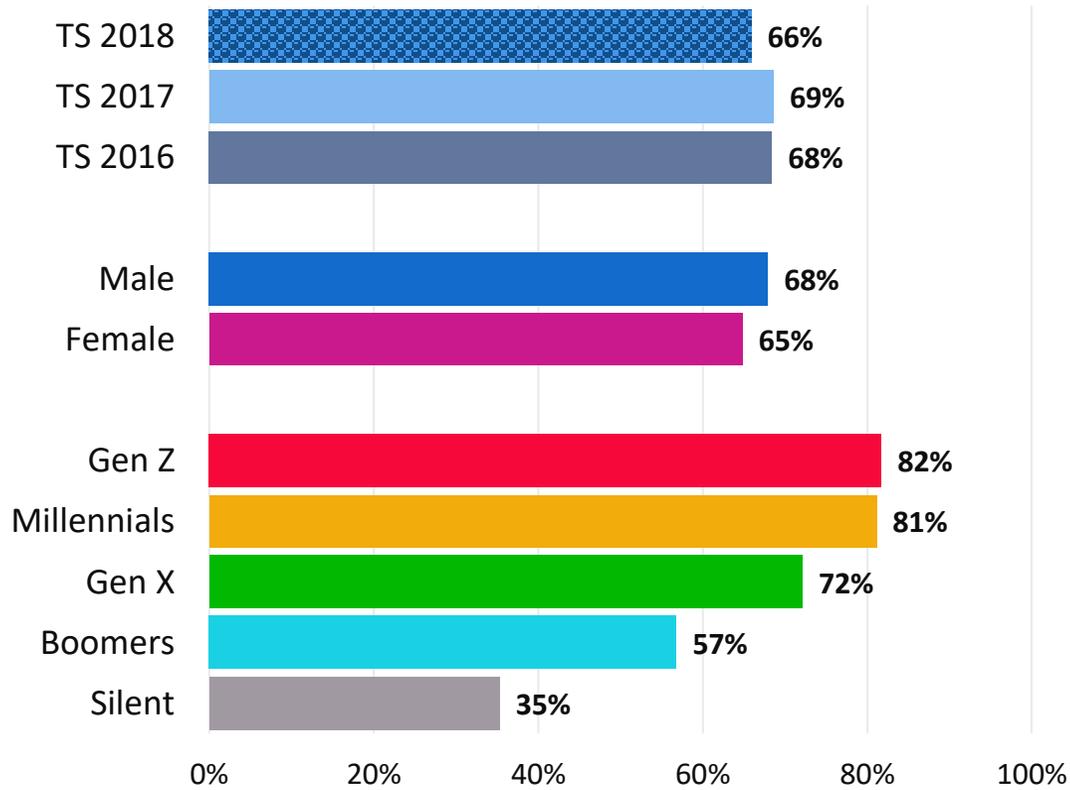
% Who Use Each Method to Wake Up in the Morning



Among cell phone, smartphone and/or tablet owners

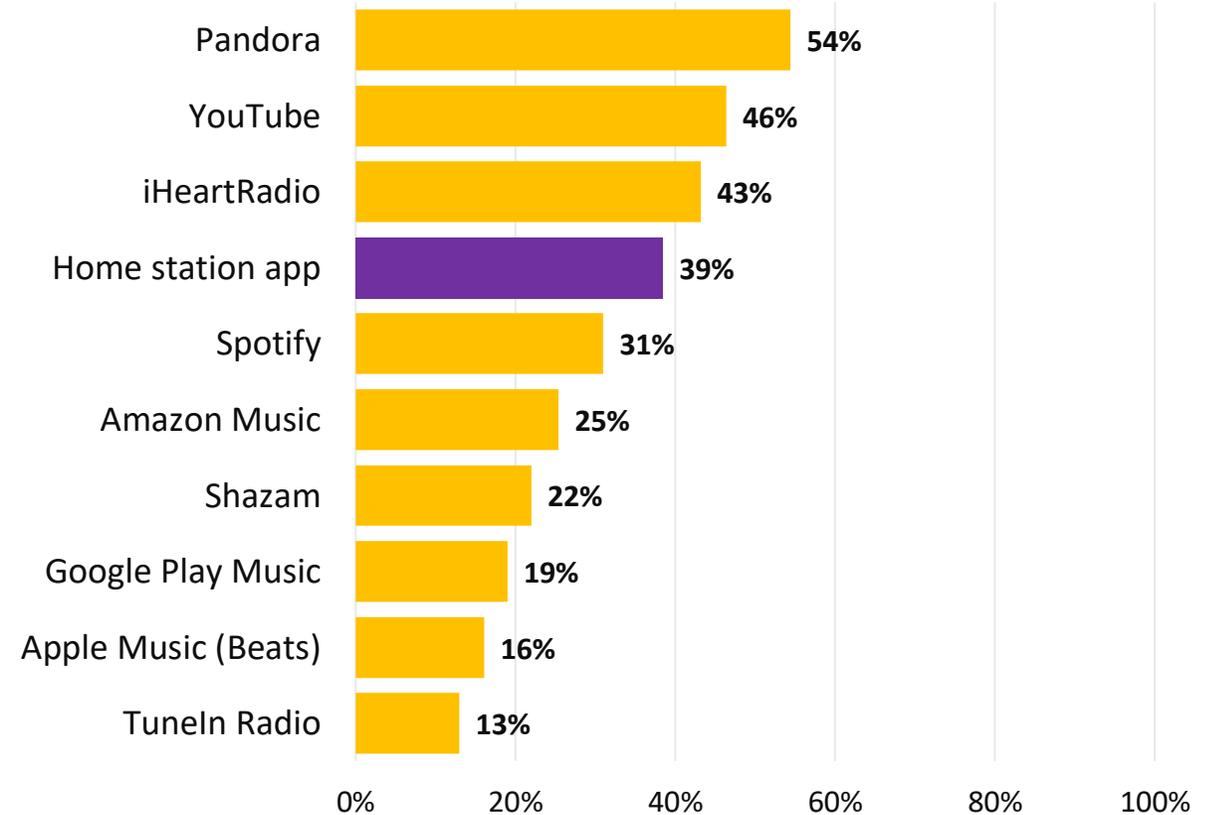
About Two-Thirds Have Downloaded a Radio/Music App on Their Mobile Device; Pandora Is the Most Downloaded

% Who Have Downloaded a Radio/Music App



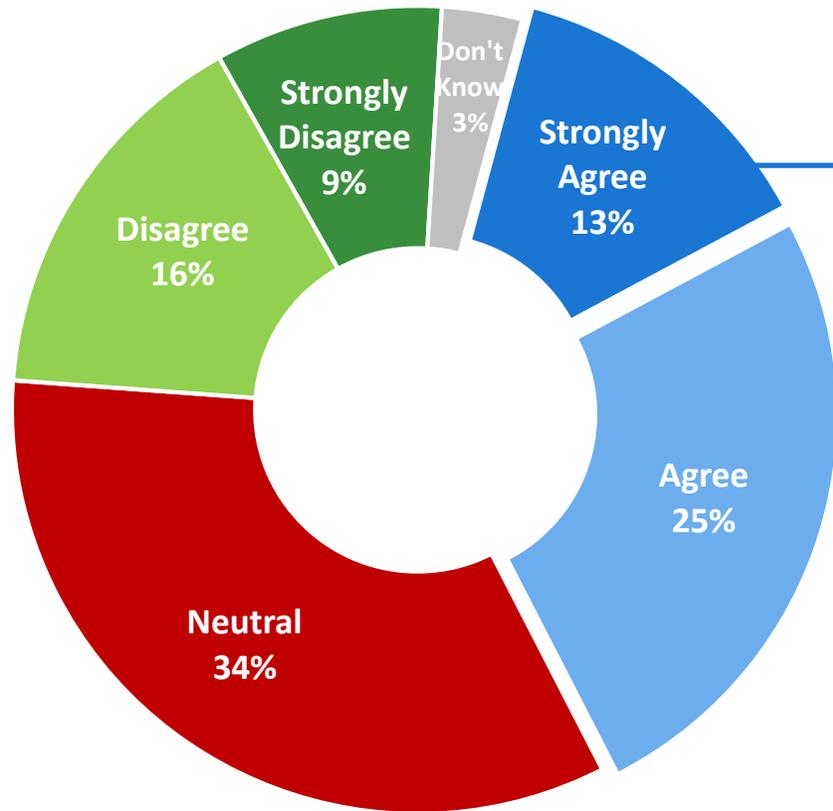
Among smartphone and/or tablet owners

% of Smartphone/Tablet Owners Who Have Downloaded Each Radio/Music App



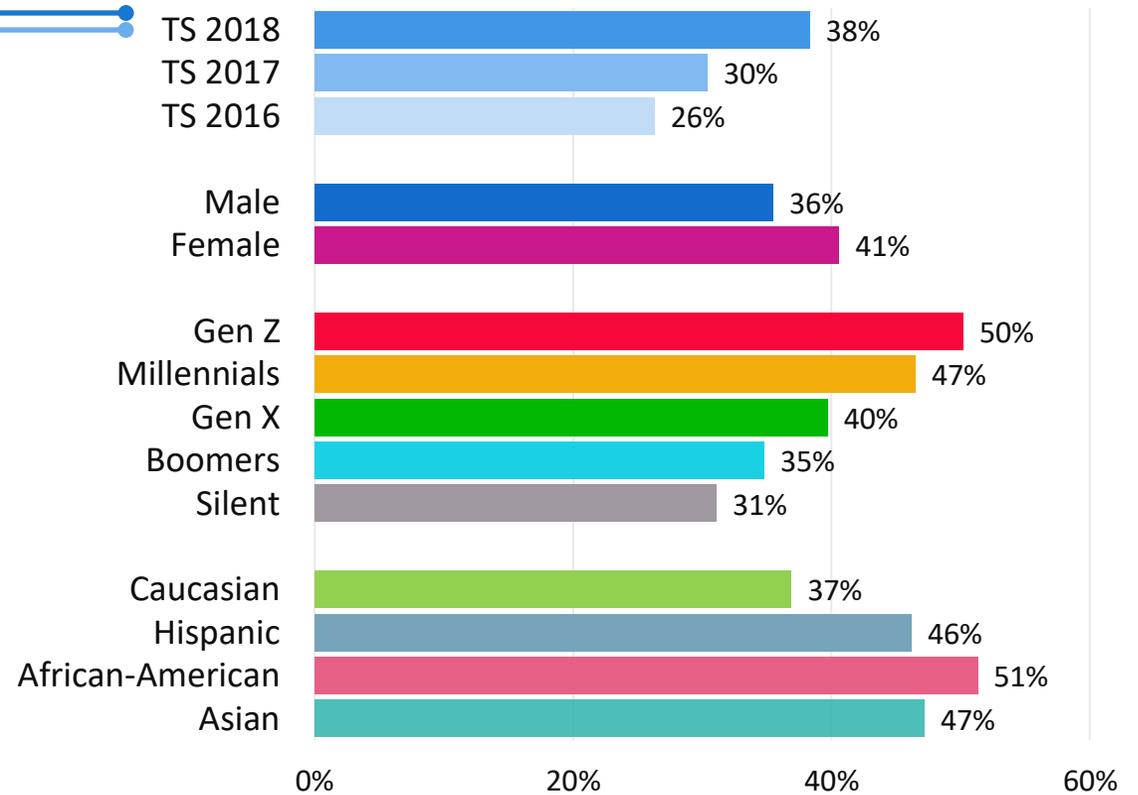
Among those who have downloaded a radio/music app
(Top 10 apps downloaded shown)

There Is Increasing Engagement with Stations That Interact Socially With Their Listeners; Particularly Younger Generations

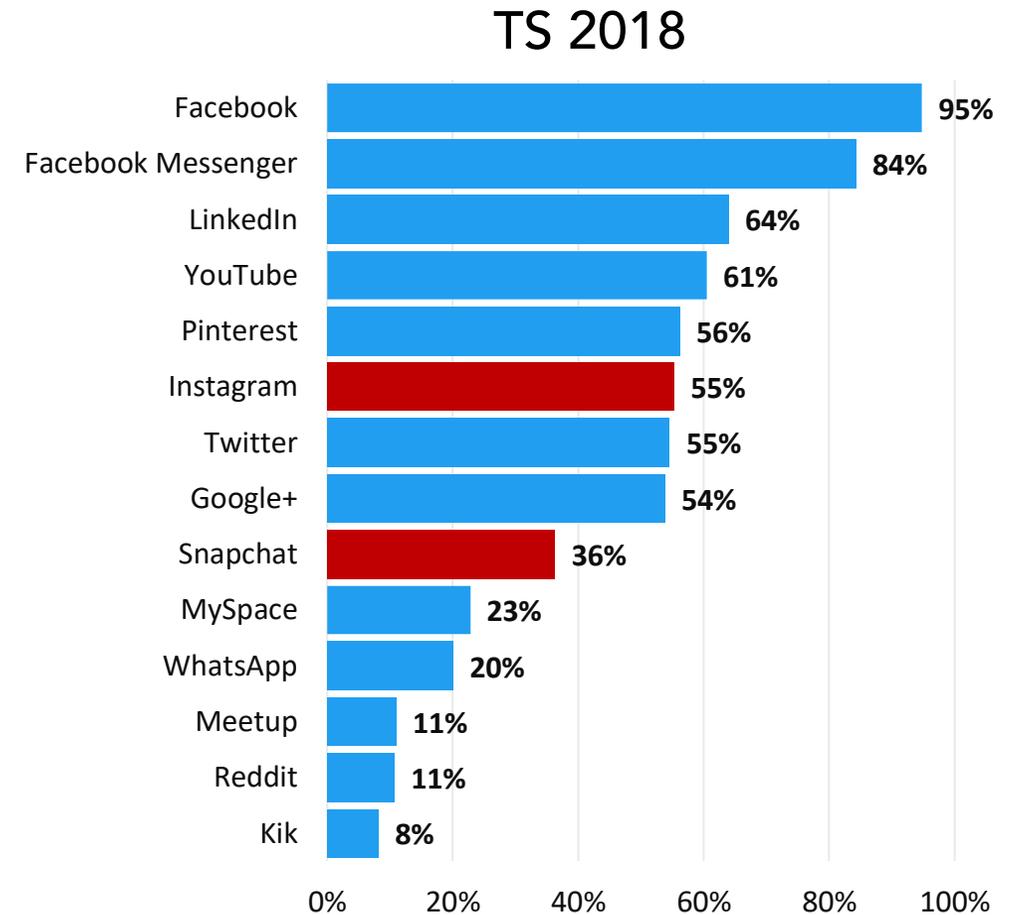
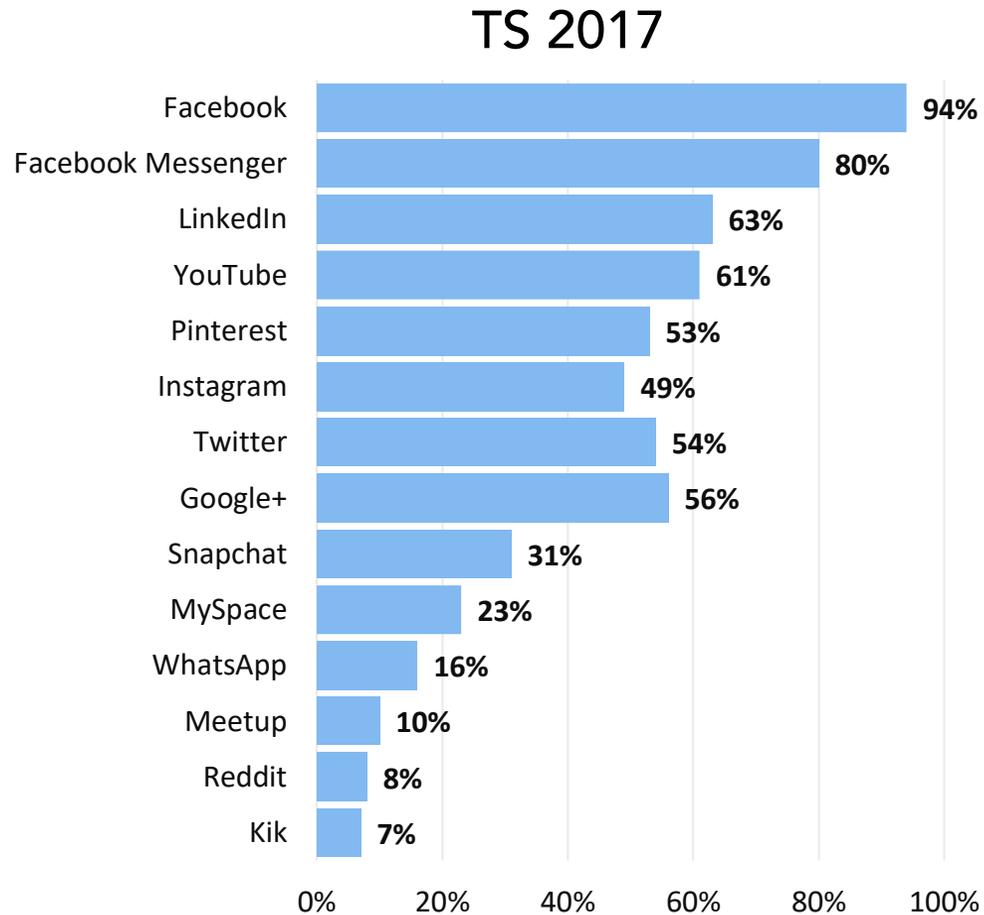


"I find myself listening more to radio stations that interact with me socially"

% Agreement (Strongly Agree + Agree)



Among Those With a Social Media Profile, Instagram & Snapchat Show the Biggest Gains in the Past Year



Among those who have any social media profile, % who have a profile on (platform)

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