

The Mobile Opportunity for Radio in Challenging Times

How Apps & Smart Speakers Are
Changing the Way We Listen to Radio



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TECHSURVEY

2020

JACOBS MEDIA

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COVID-19



SURVEY2

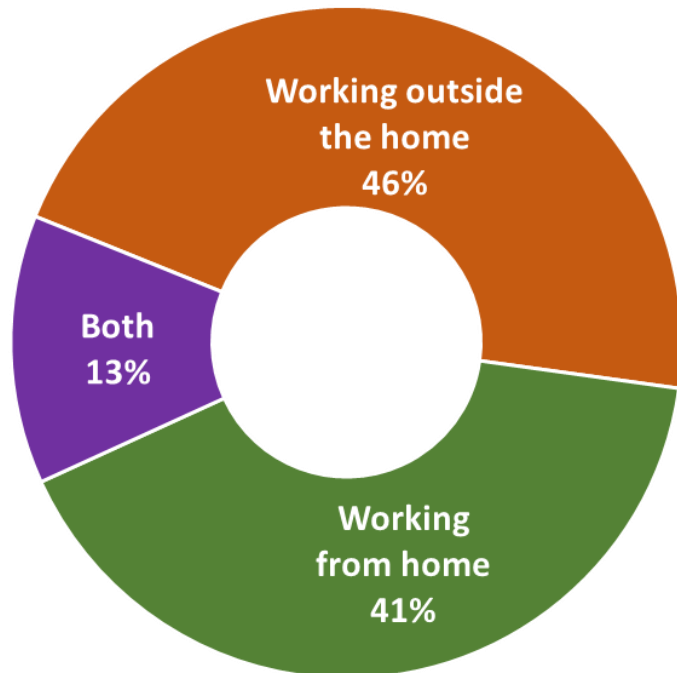
Methodology

- 504 commercial radio stations in the U.S. & Canada
- N = 46,008
- Interview dates: January 7 - February 9, 2020
- **COVID-19: 98 stations | 16,004 | May 12-14, 2020**
- 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 2019 market populations data.
- This is a web survey and does not represent all commercial radio listeners or even each station's audience. It is not stratified to the U.S./Canadian populations.

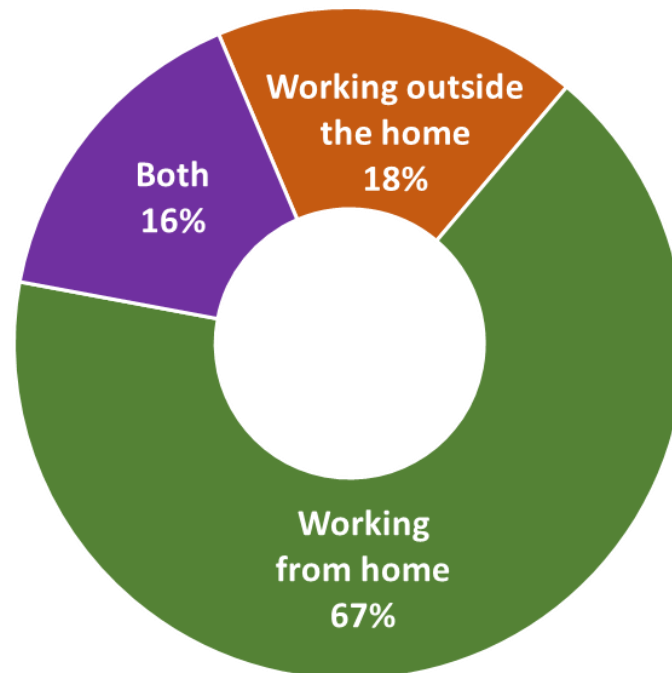


Working From Home During Covid-19

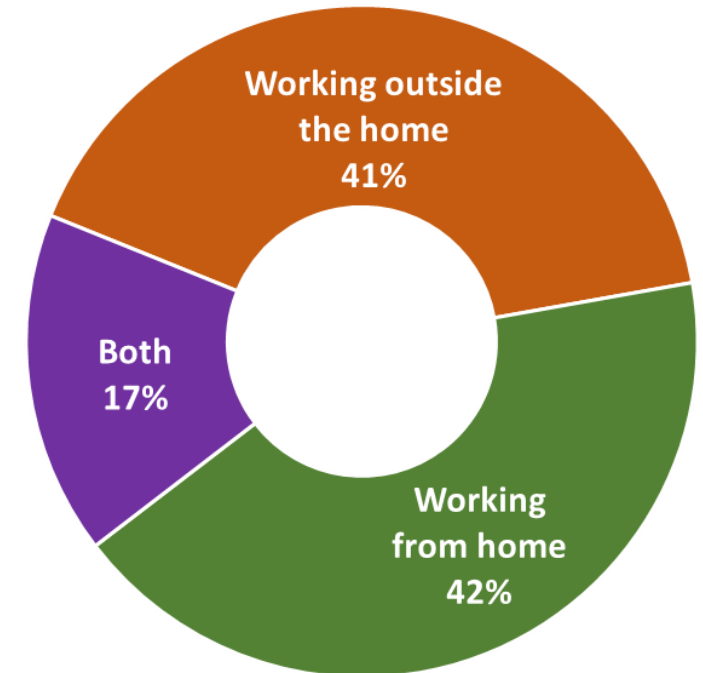
Commercial Radio



Public Radio

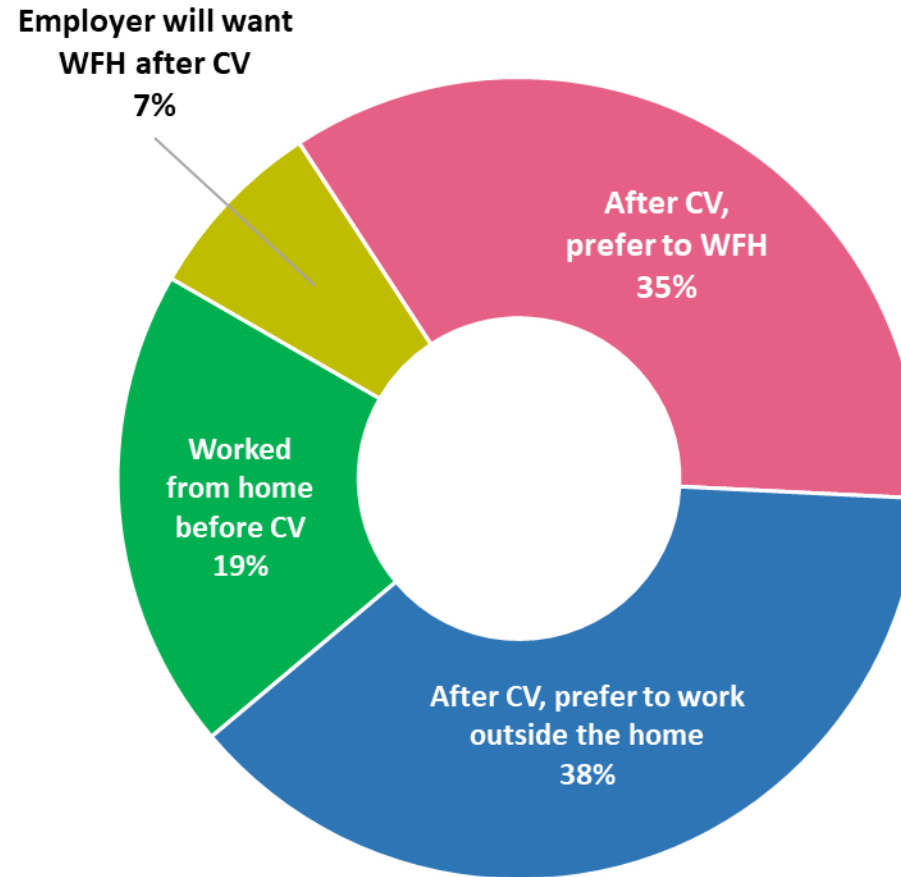


Christian Music Radio



Among those currently employed

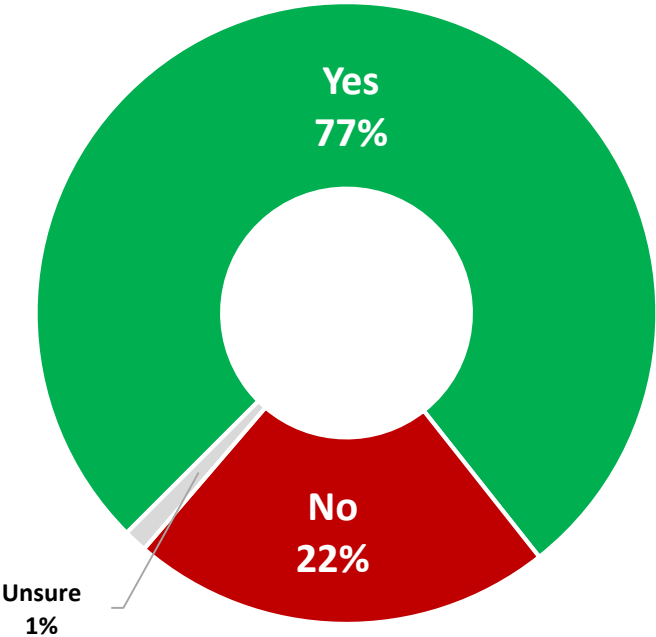
Work From Home Post-Covid-19



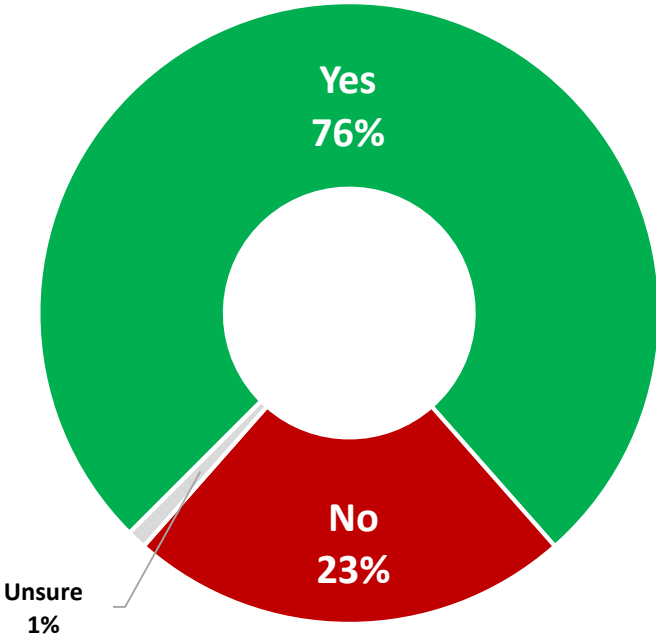
Among those currently employed and working from home

Have A Working Radio At Home

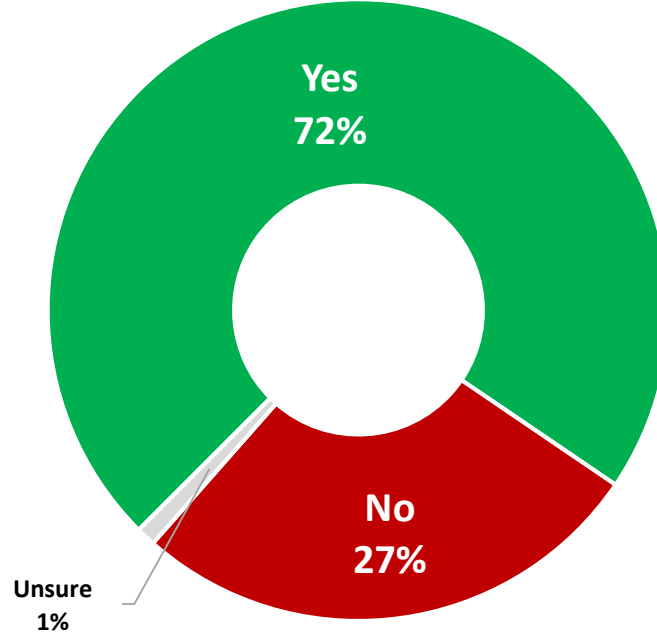
Commercial Radio



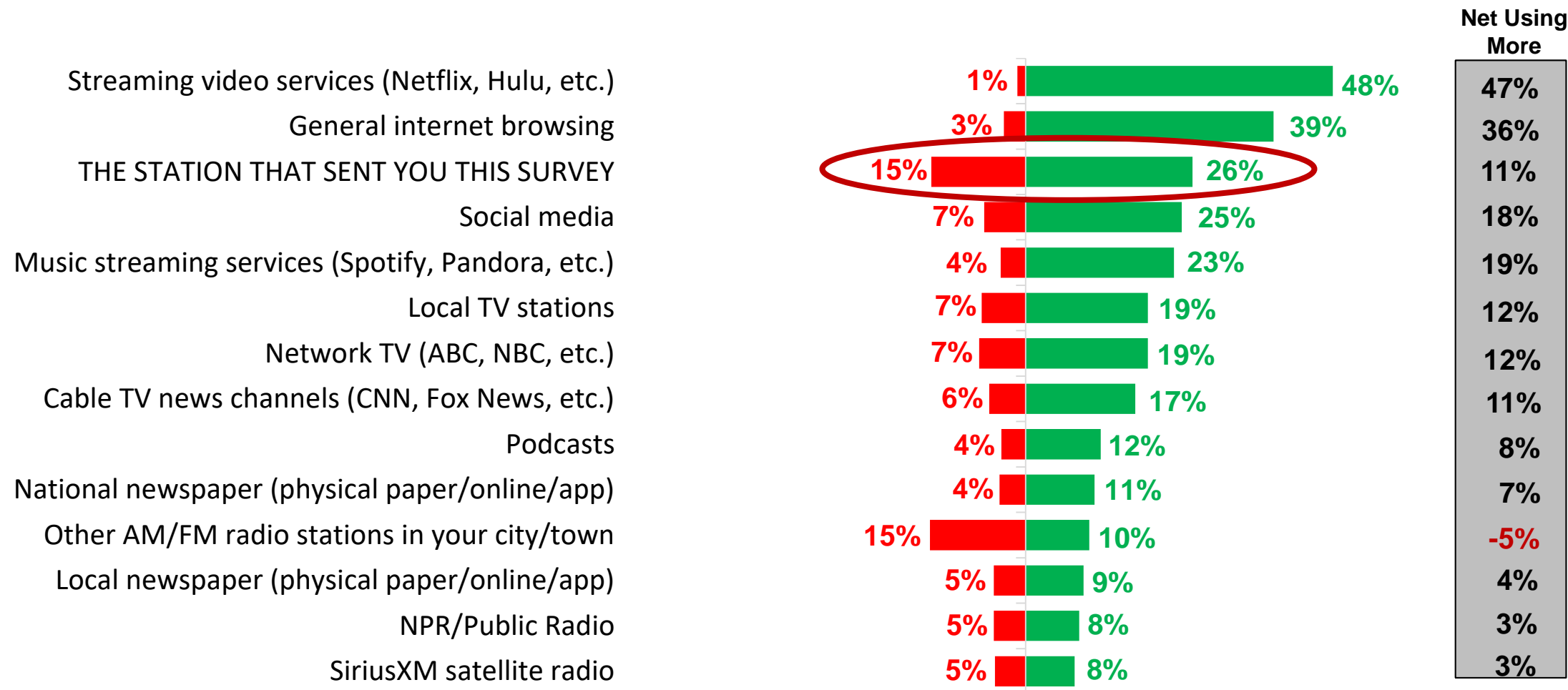
Public Radio



Christian Music Radio



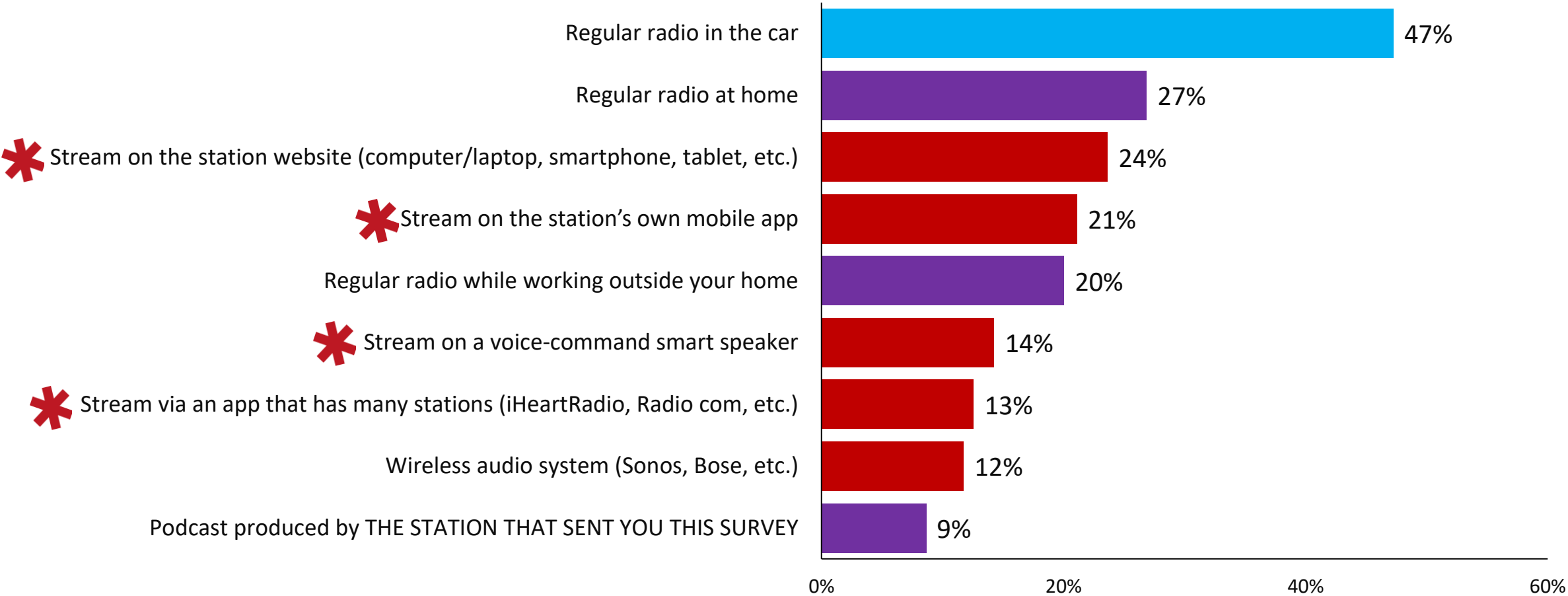
Media Usage During Covid-19

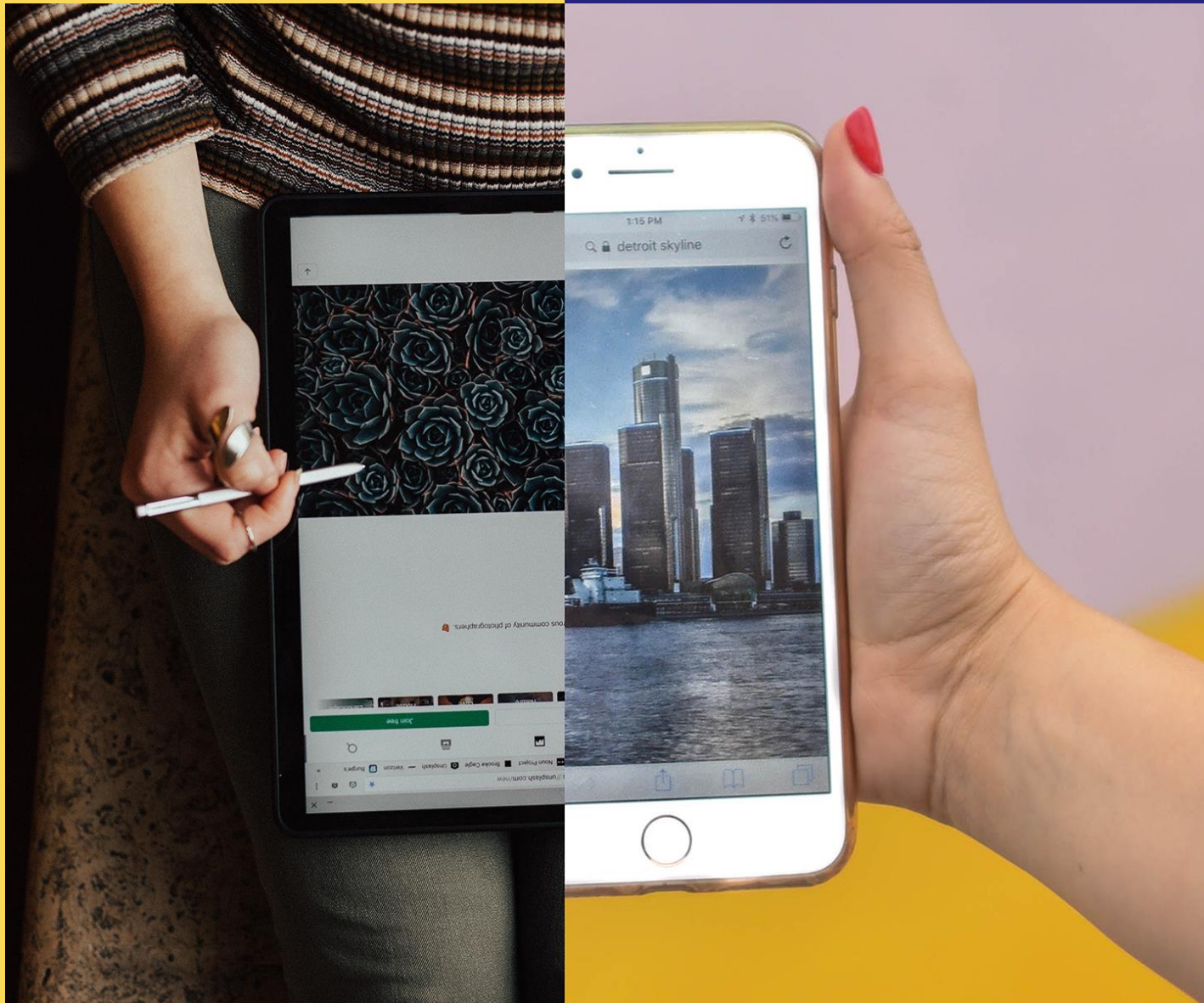


← % Using Less Now % Using More Now →

Radio Listening During Covid-19

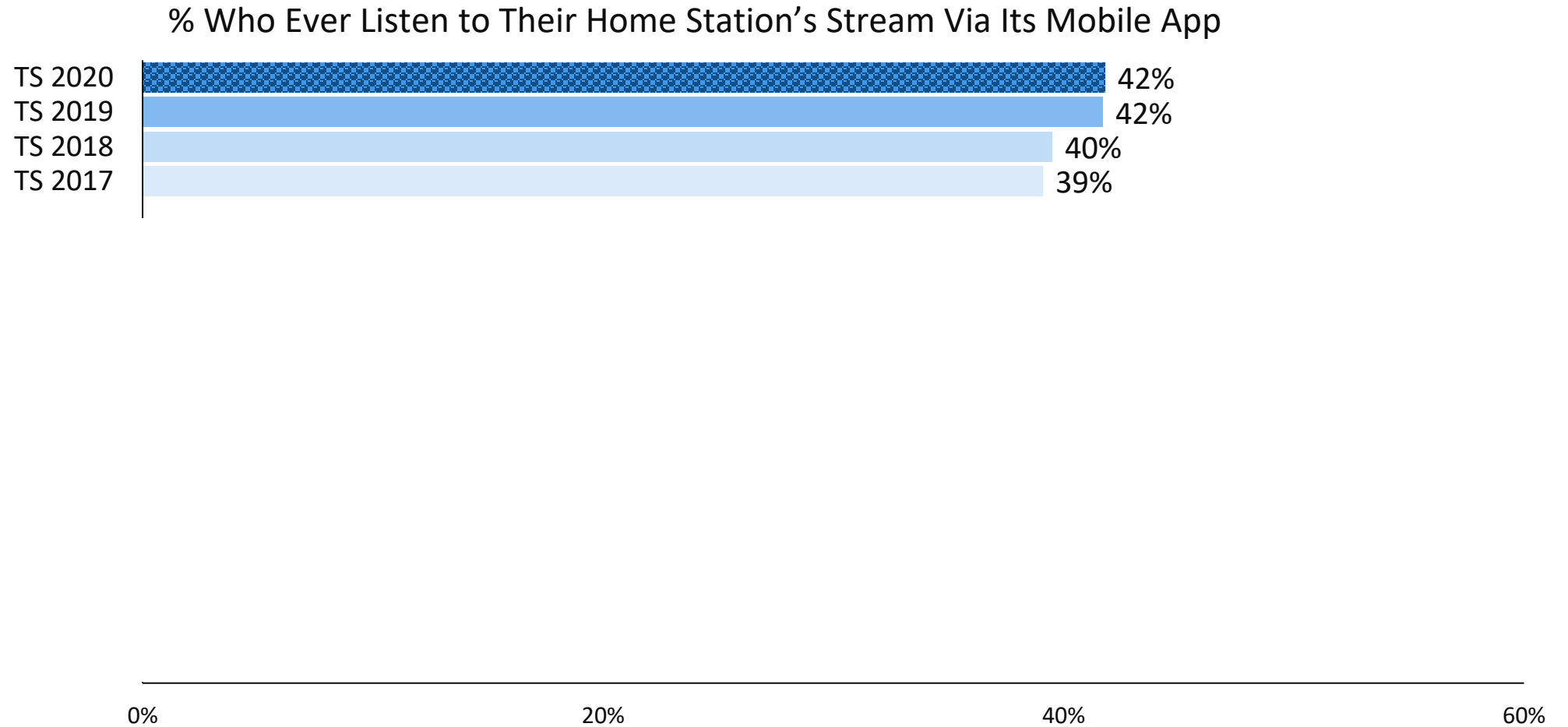
Among Those Currently Listening to Their Home Station,
% Using Each Platform “A Lot” to Listen to the Station





Mobile Phones & Apps

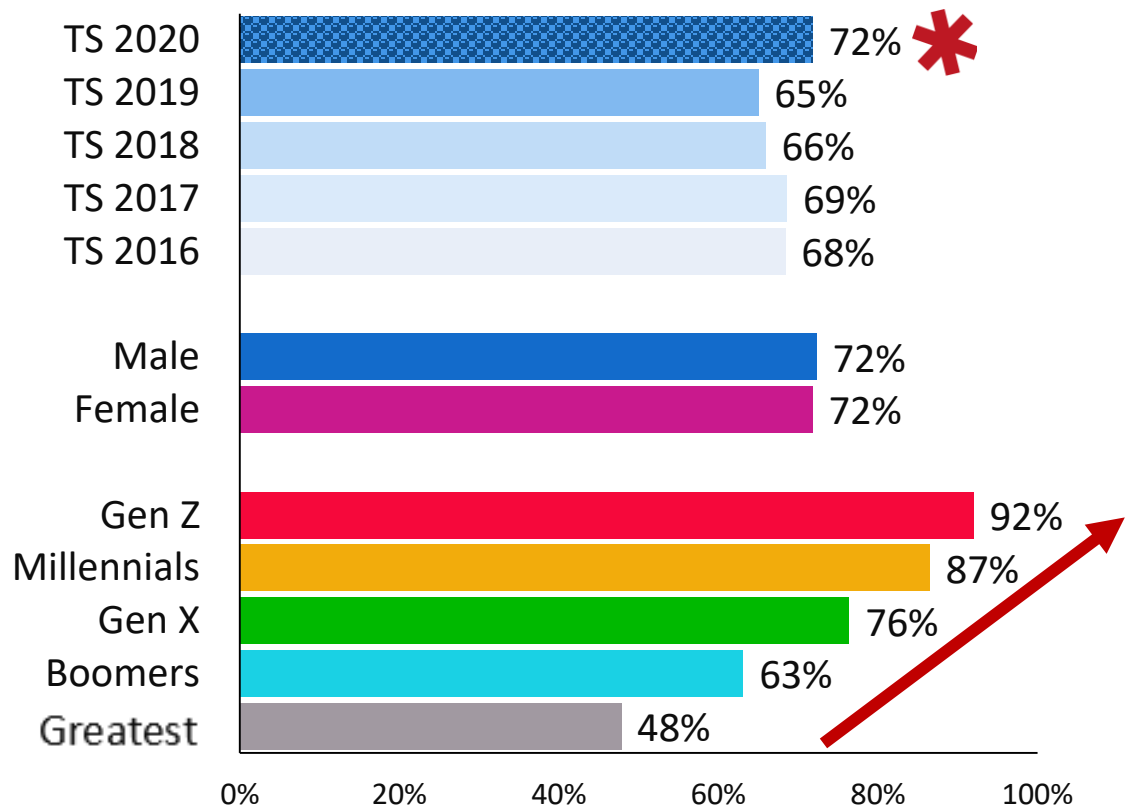
Mobile App Streaming Profile



Among those who listen to streaming audio monthly or more
and listen to their home station stream weekly or more

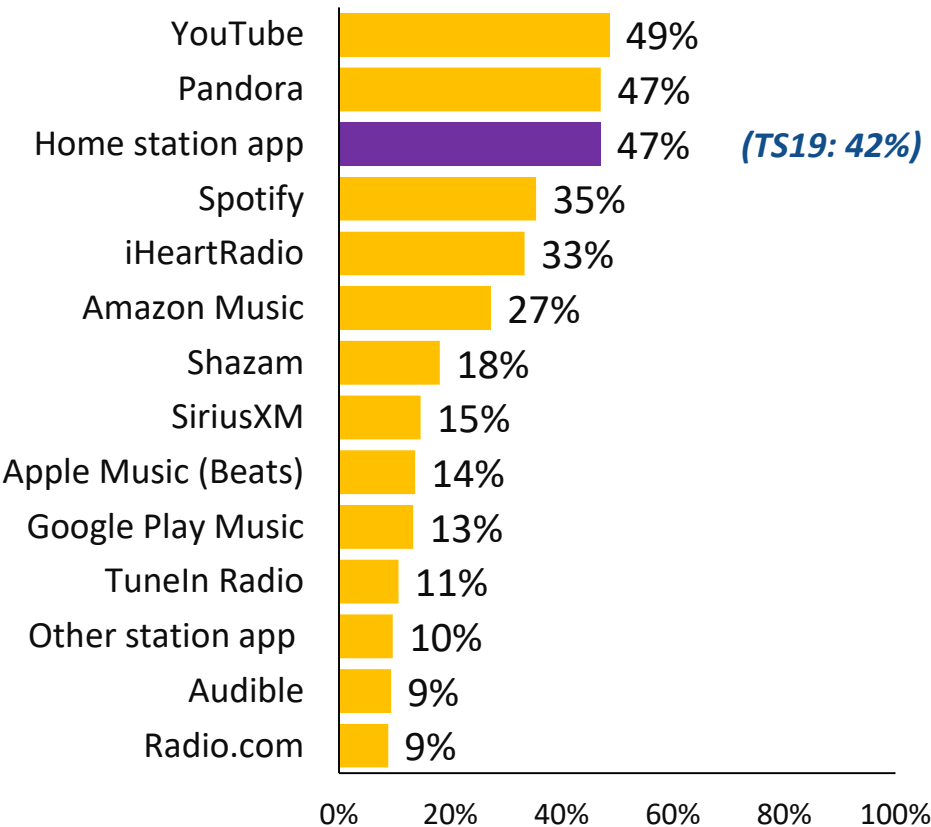
Downloaded a Radio/Music App

% Who Have Downloaded a Radio/Music App



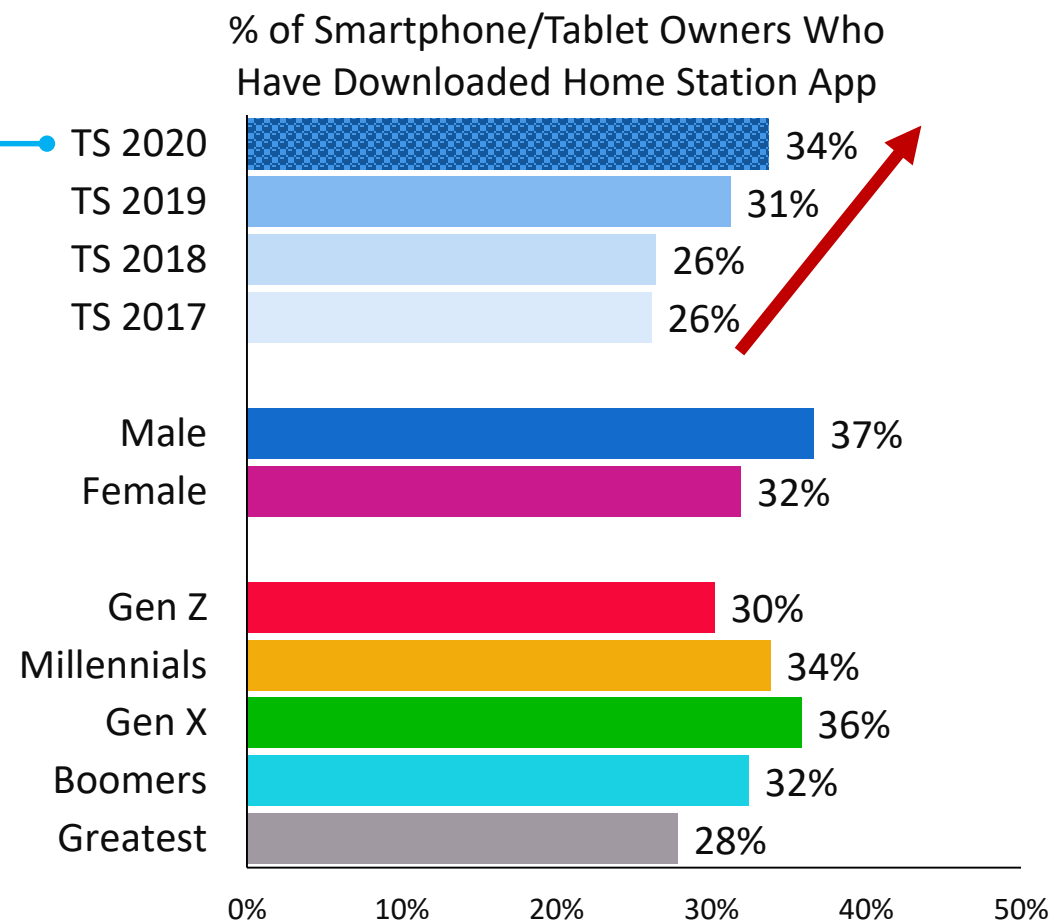
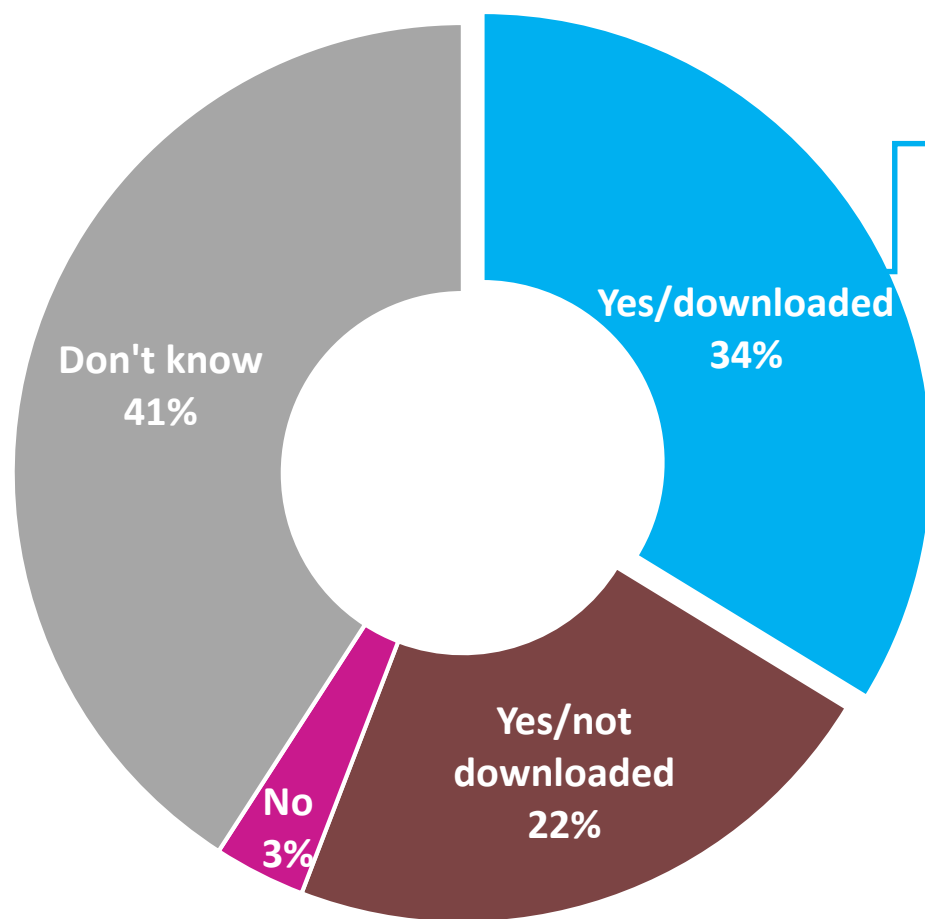
Among smartphone and/or tablet owners

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

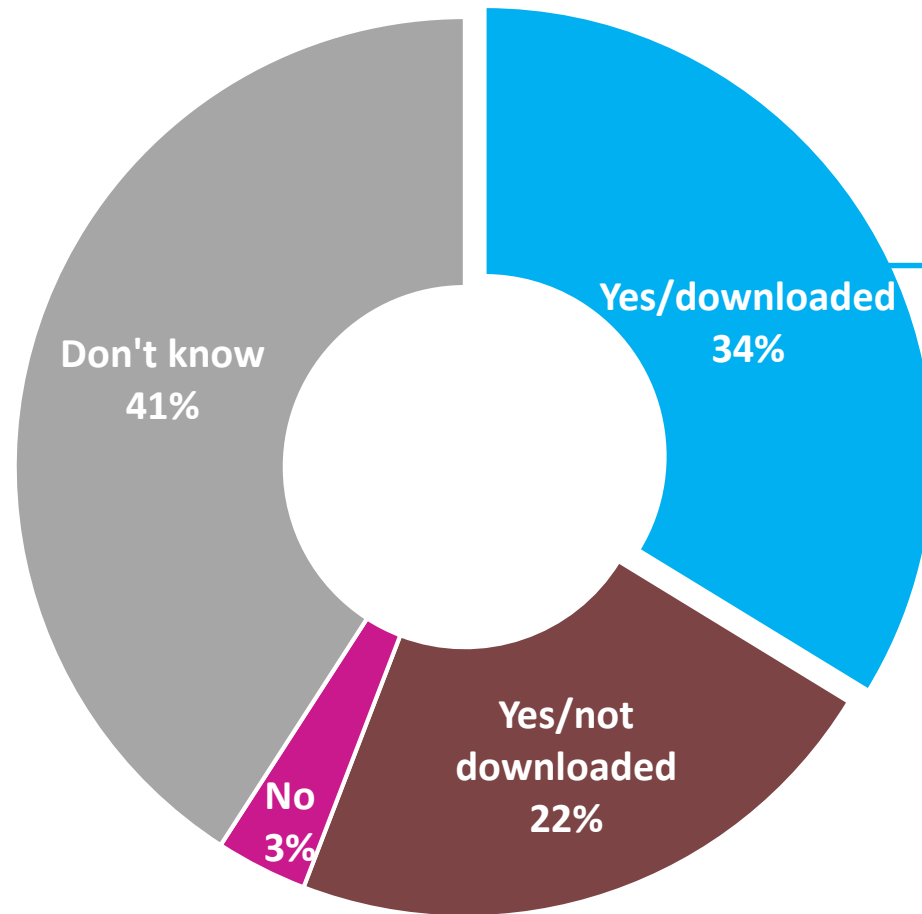


Among those who have downloaded a radio/music app
(apps 9% and higher shown)

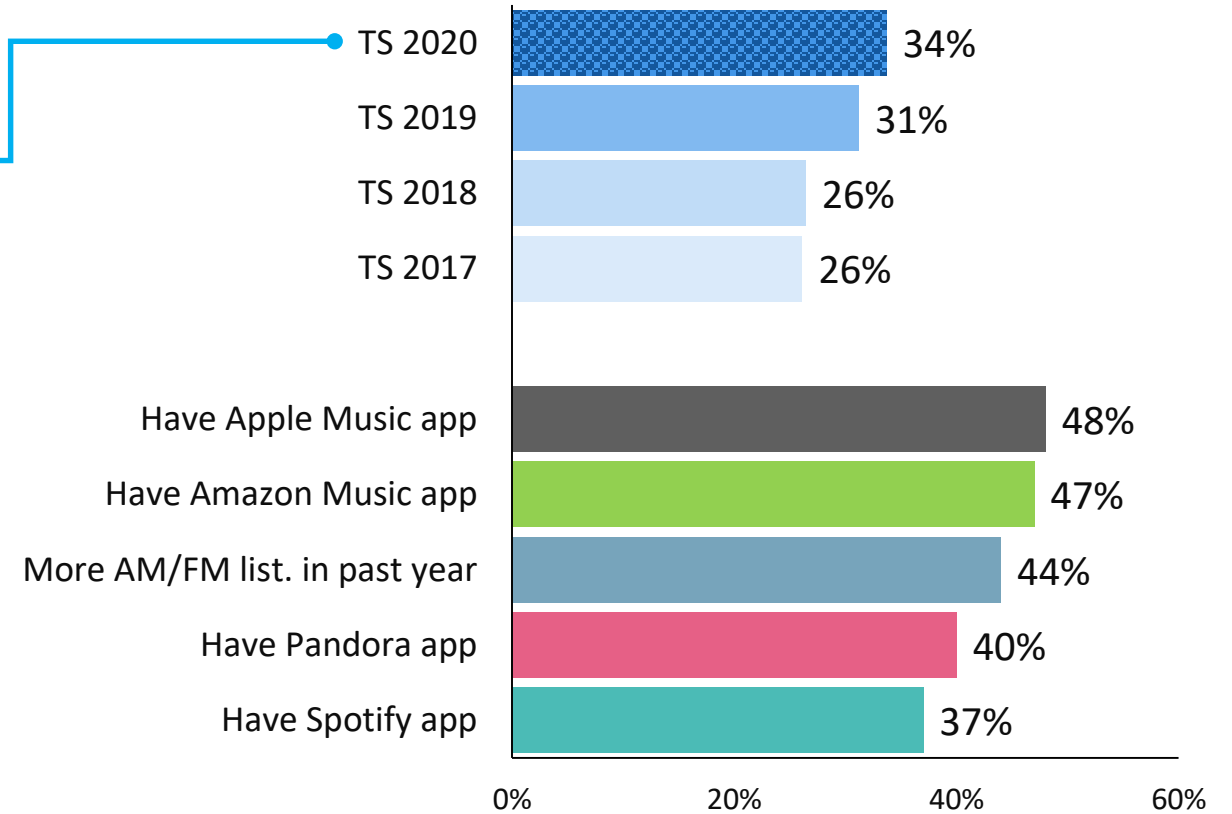
Aware of/Downloaded Station's Mobile App



Aware of/Downloaded Station's Mobile App

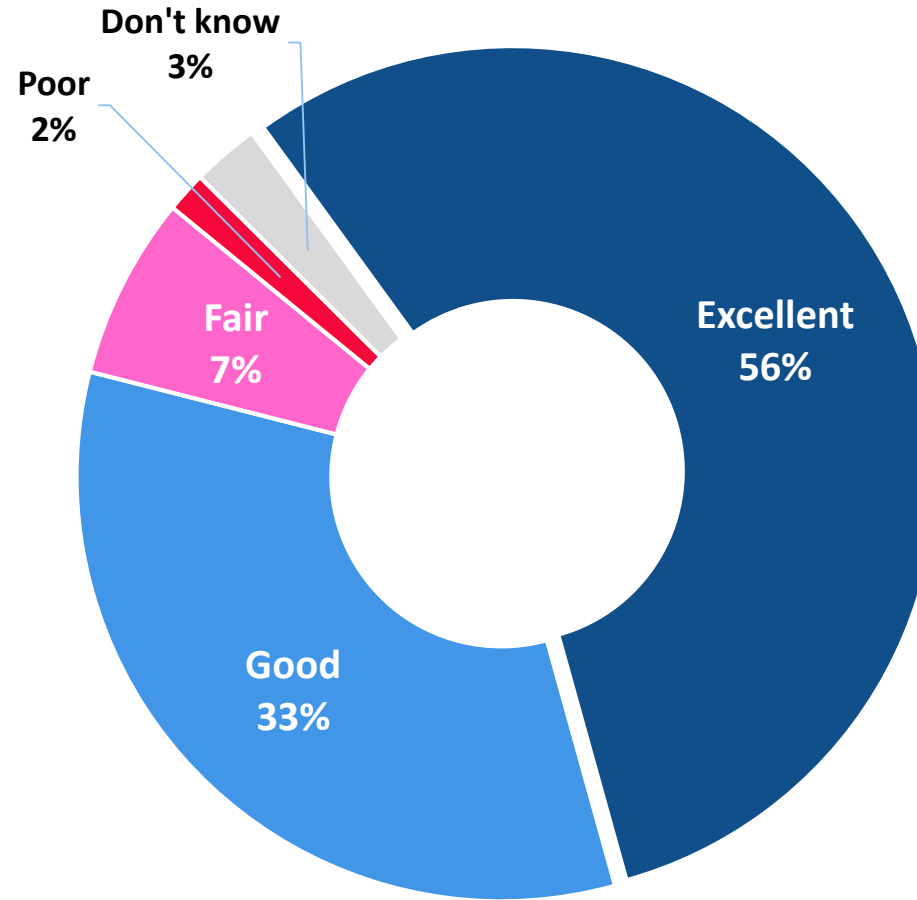


% of Smartphone/Tablet Owners Who Have Downloaded Home Station App



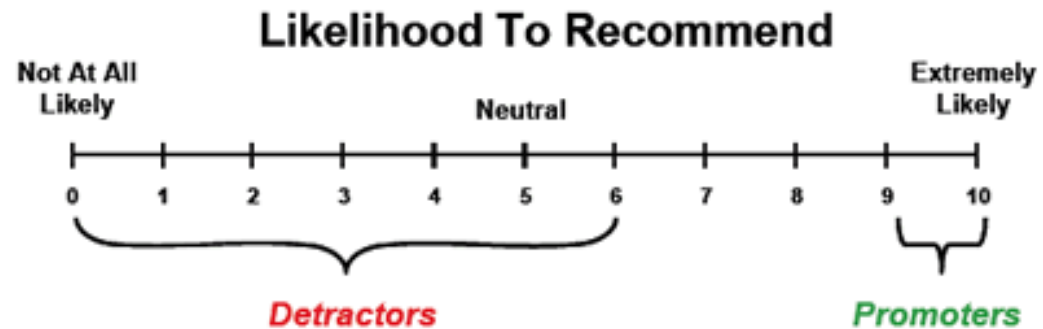
Rating Radio Station Mobile Apps

"Overall, how would you rate THE STATION THAT SENT YOU THIS SURVEY'S app?"



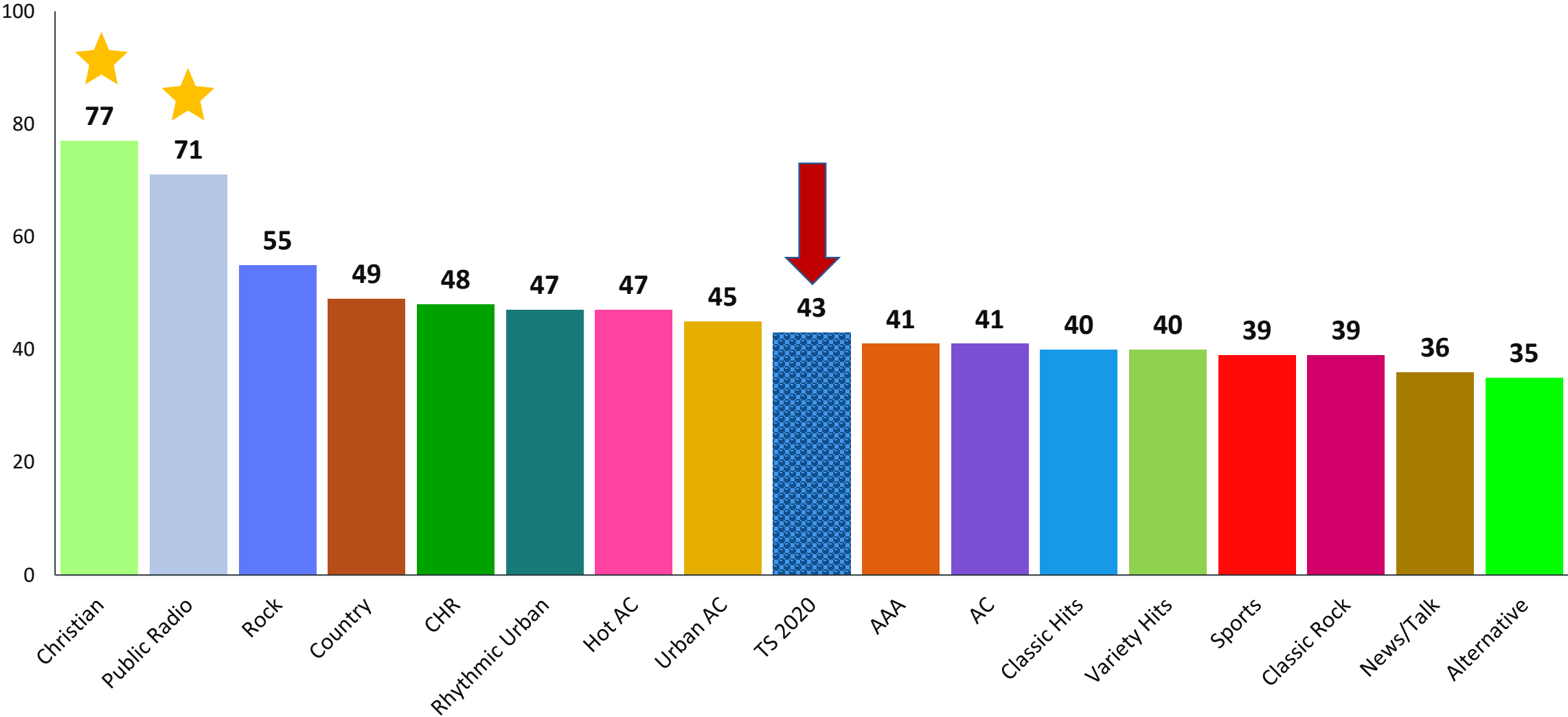
Among smartphone and/or tablet owners
who have downloaded their home station's app

NET PROMOTER

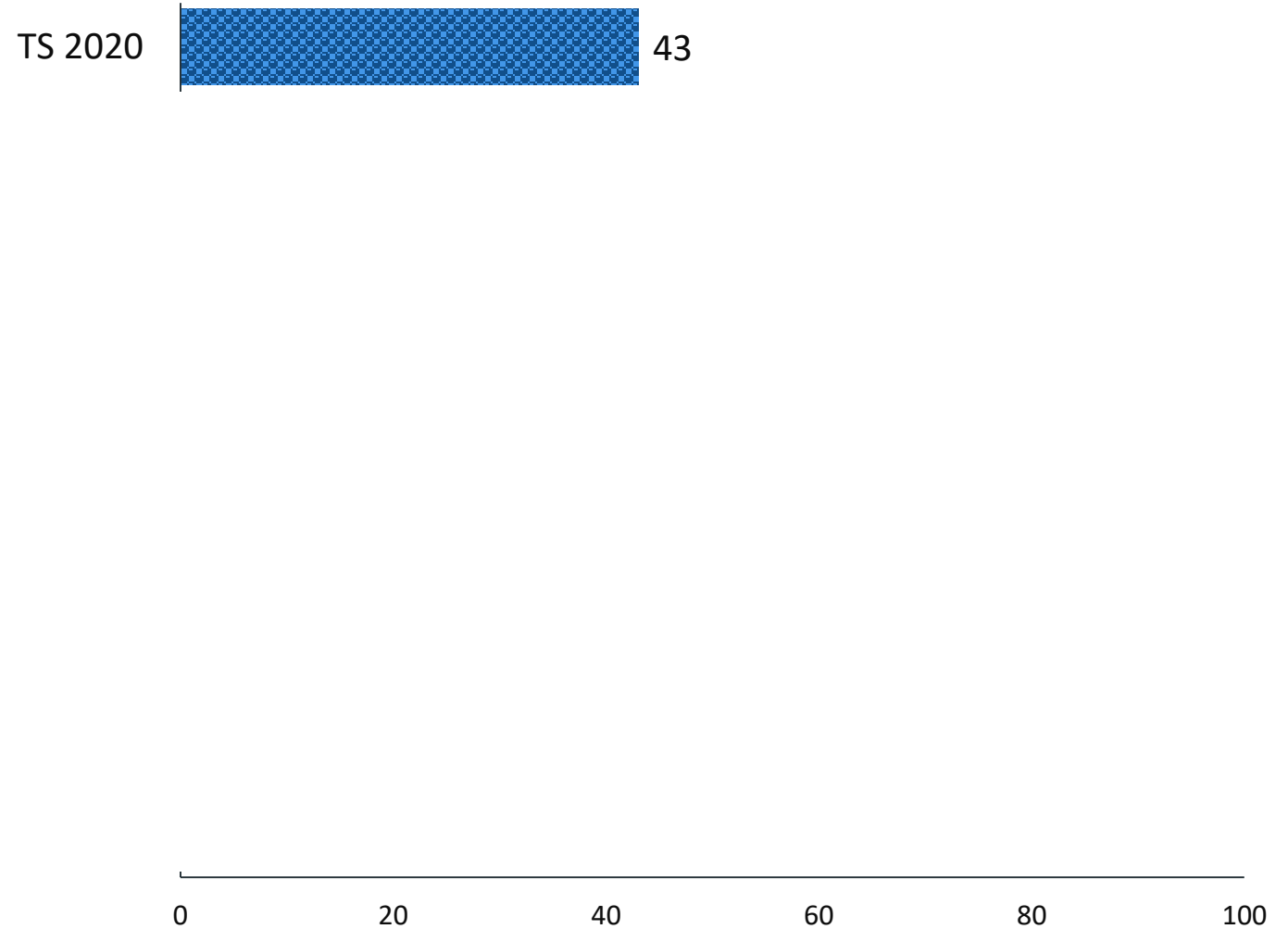


$$\% \text{ Promoters} - \% \text{ Detractors} = \text{Net Promoter Score}$$

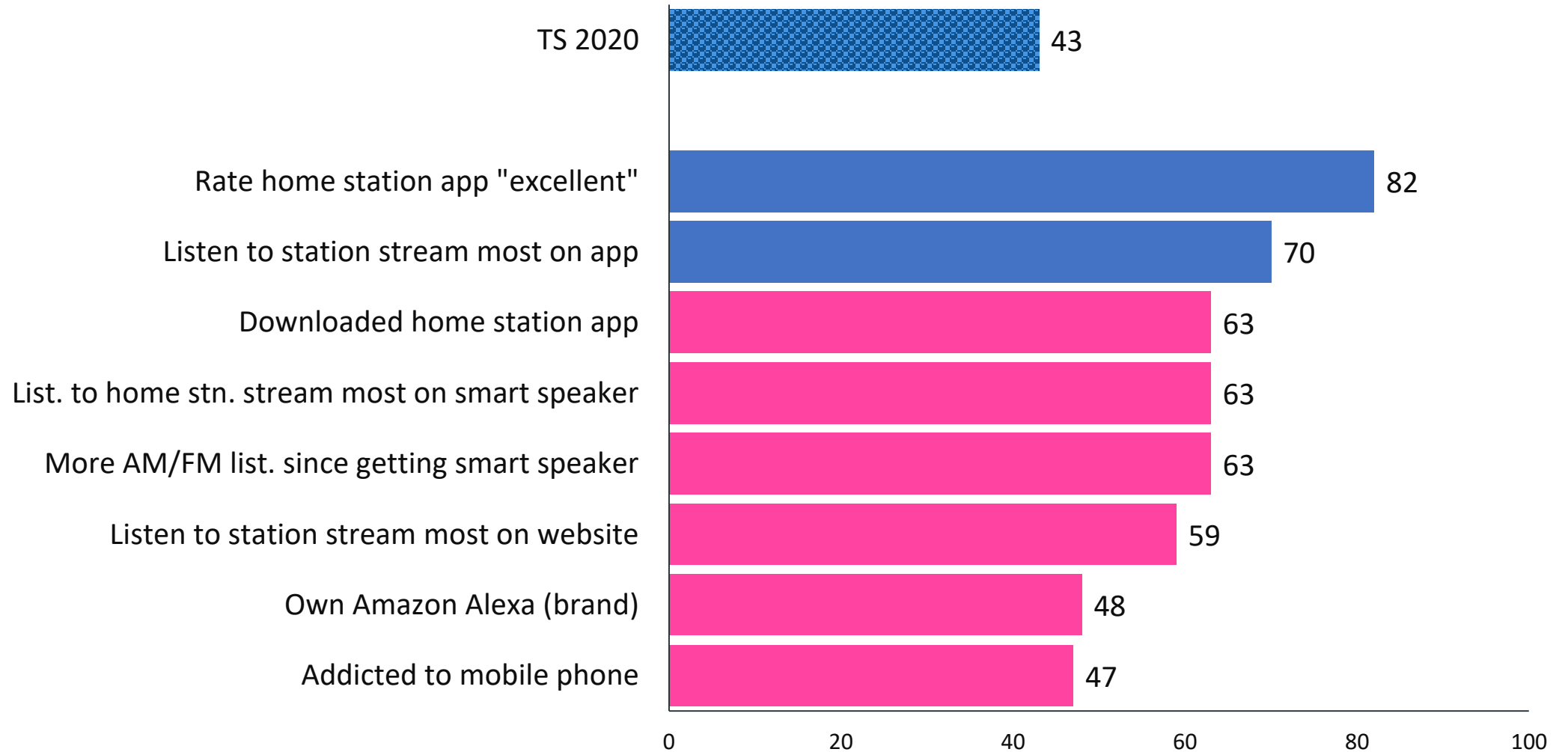
Net Promoter Score by Format



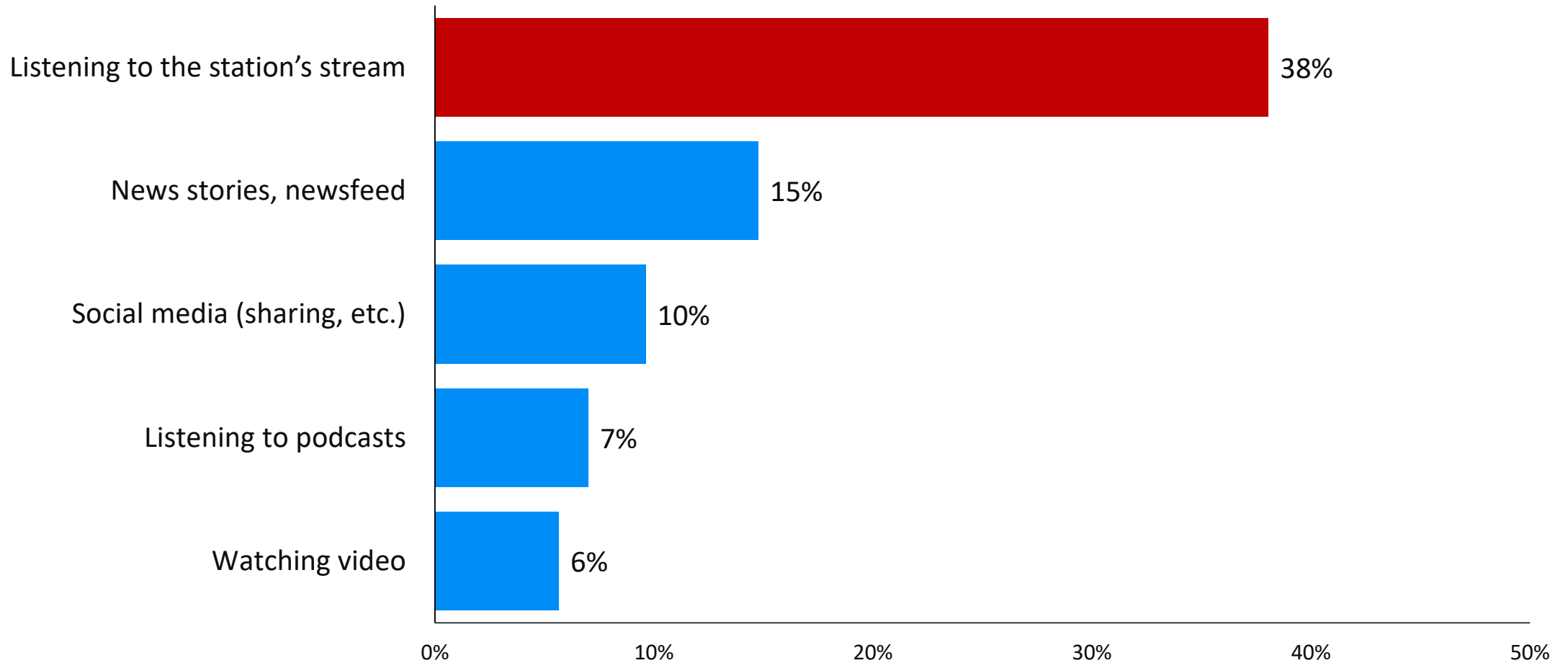
Apps & Smart Speakers Drive NPS



Apps & Smart Speakers Drive NPS

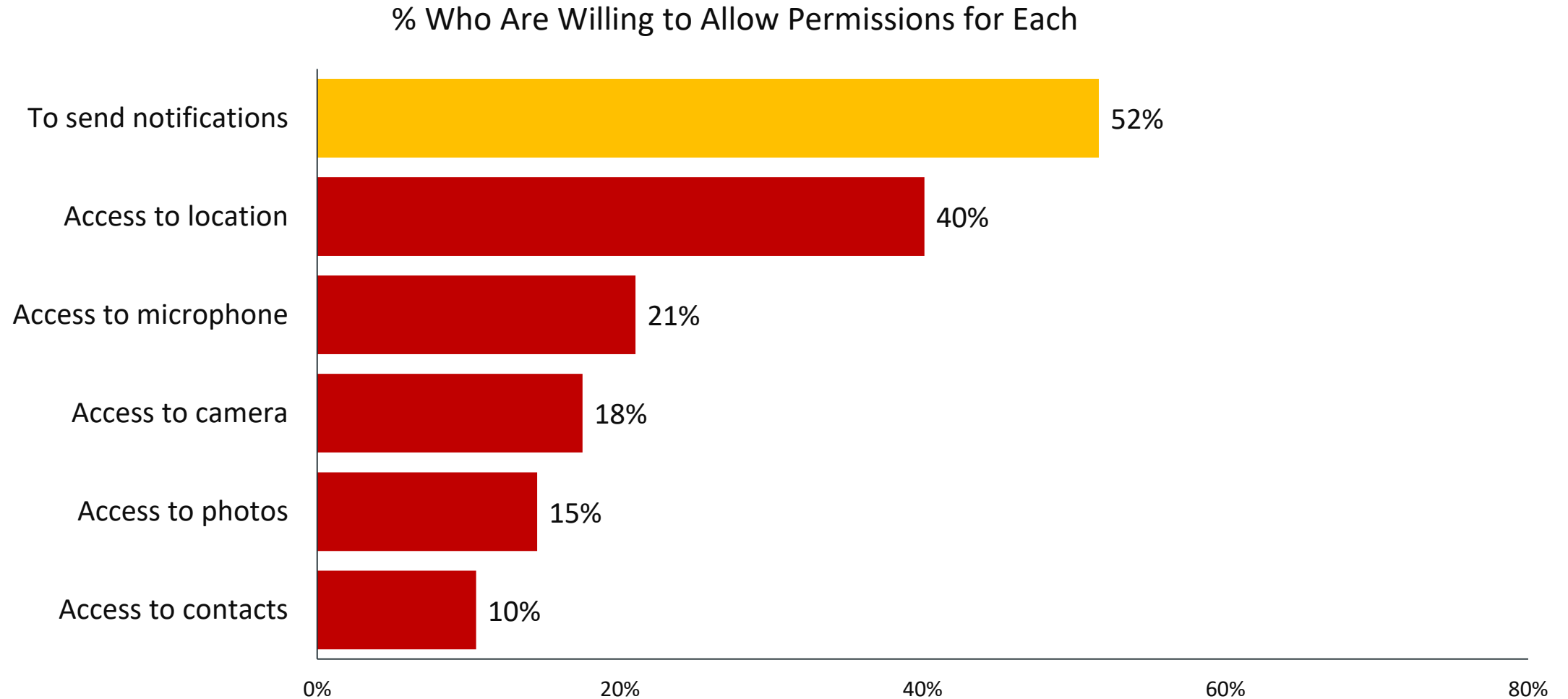


Most-Used Mobile App Features



Among those who have downloaded their home station's mobile app,
% who "frequently" use each feature (multiple responses accepted)

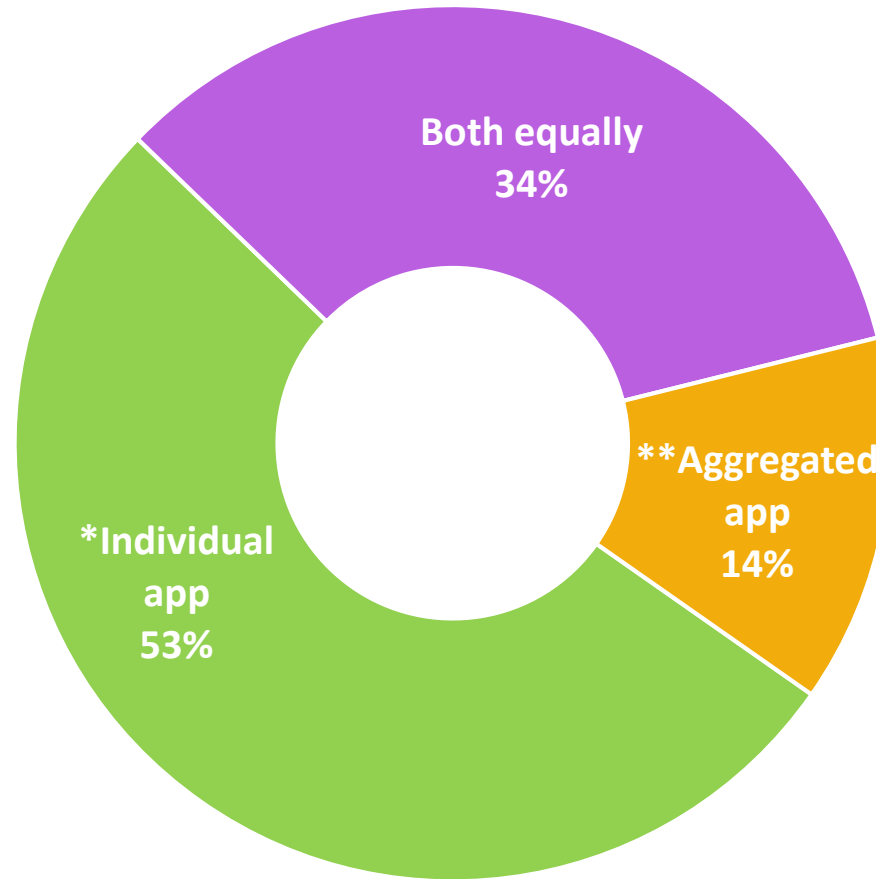
Willingness to Allow Permissions



Among smartphone and/or tablet owners who have downloaded a radio/music app

Individual vs. Aggregated Apps

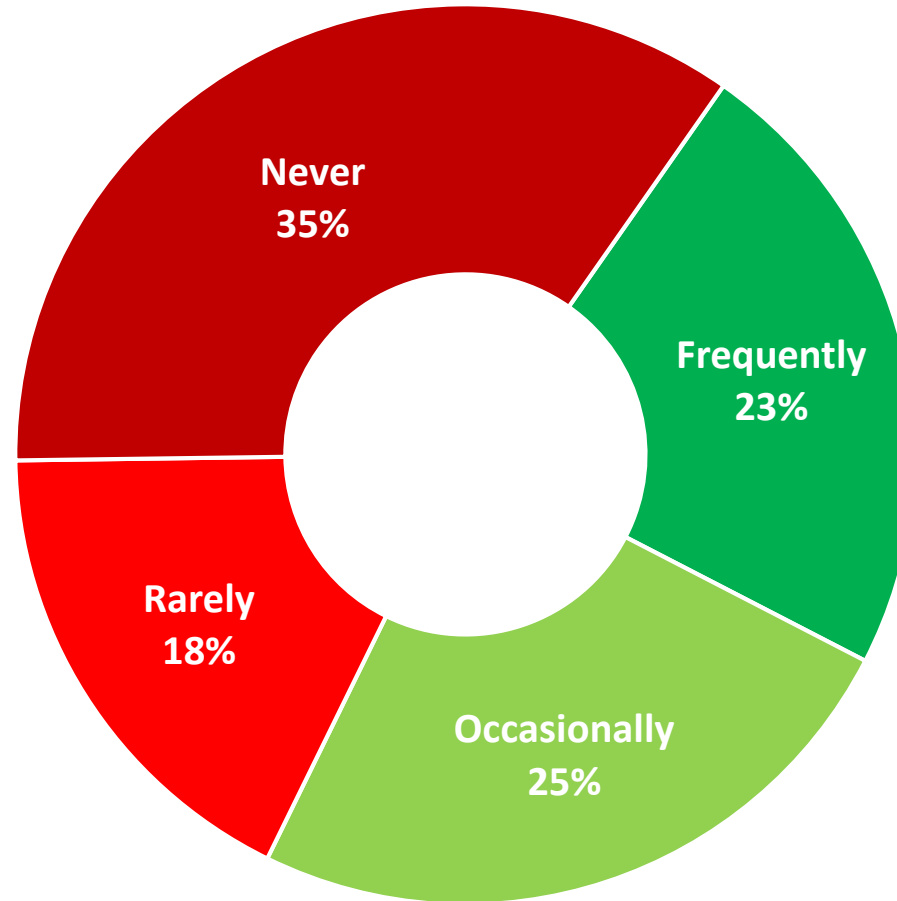
“Thinking about THE STATION THAT SENT YOU THIS SURVEY, which mobile app format would you most like them to offer?”



Among smartphone and/or tablet owners
who are interested in a home station app

At-Work Listening Via Mobile Apps

“How often do you listen to AM/FM radio stations on a mobile device (smartphone/tablet) while working?”

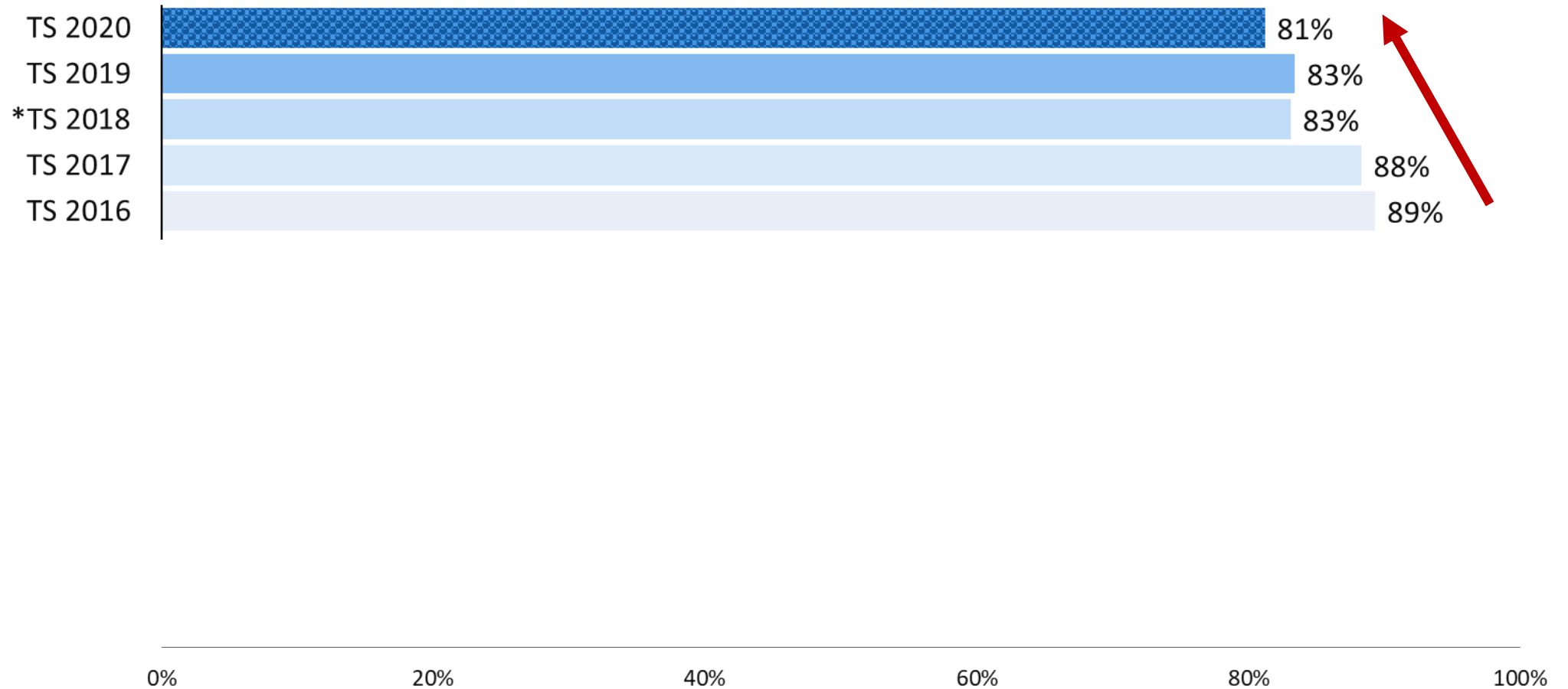


Among those who listen to any audio while working (71% of total)



Smart Speakers & Voice

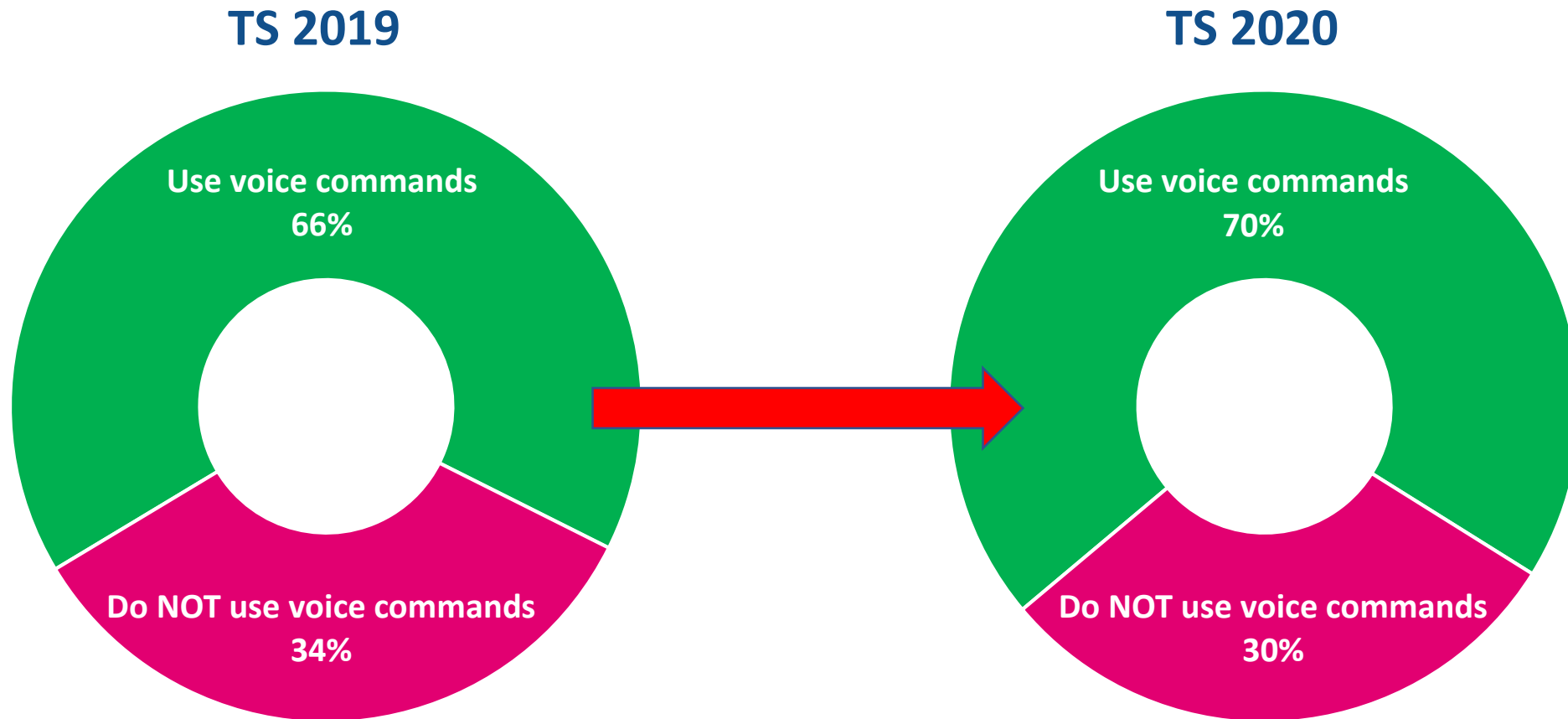
Working AM/FM Radio At Home



% with a regular radio in working condition where they live that they use*

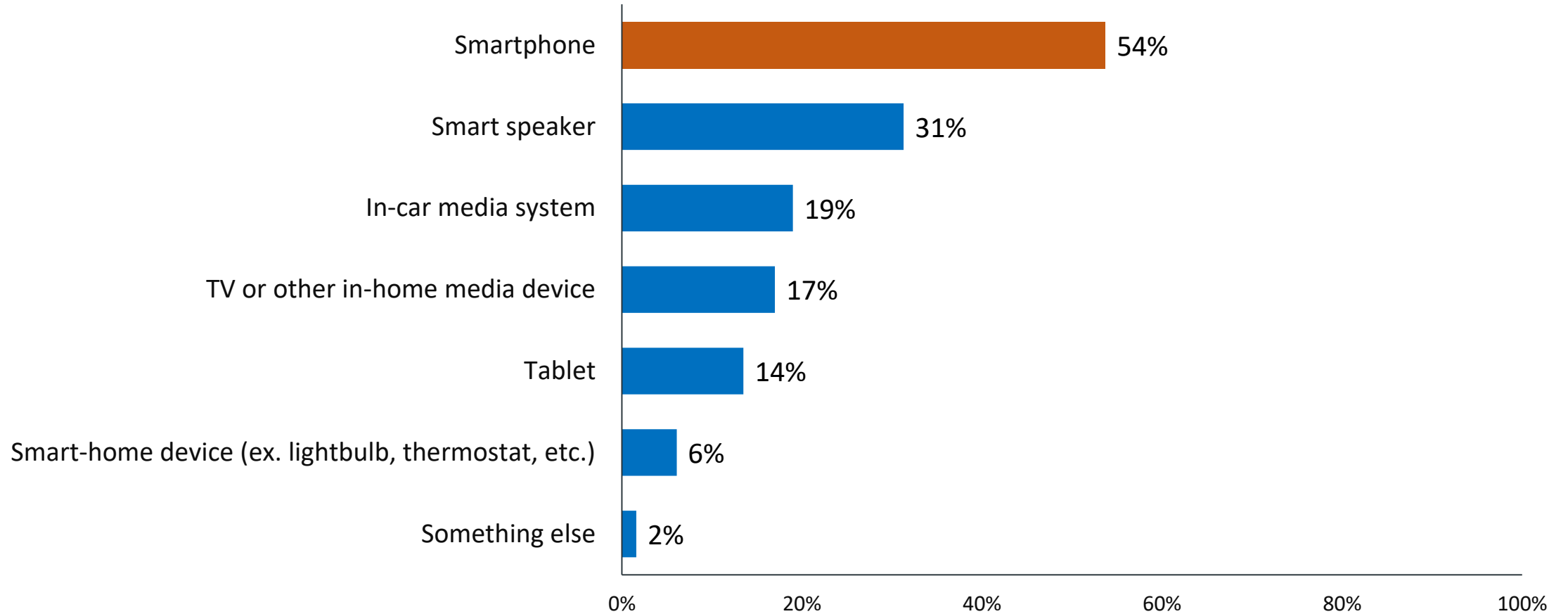
*updated wording: "...that you use?"

Use of Voice Commands Growing



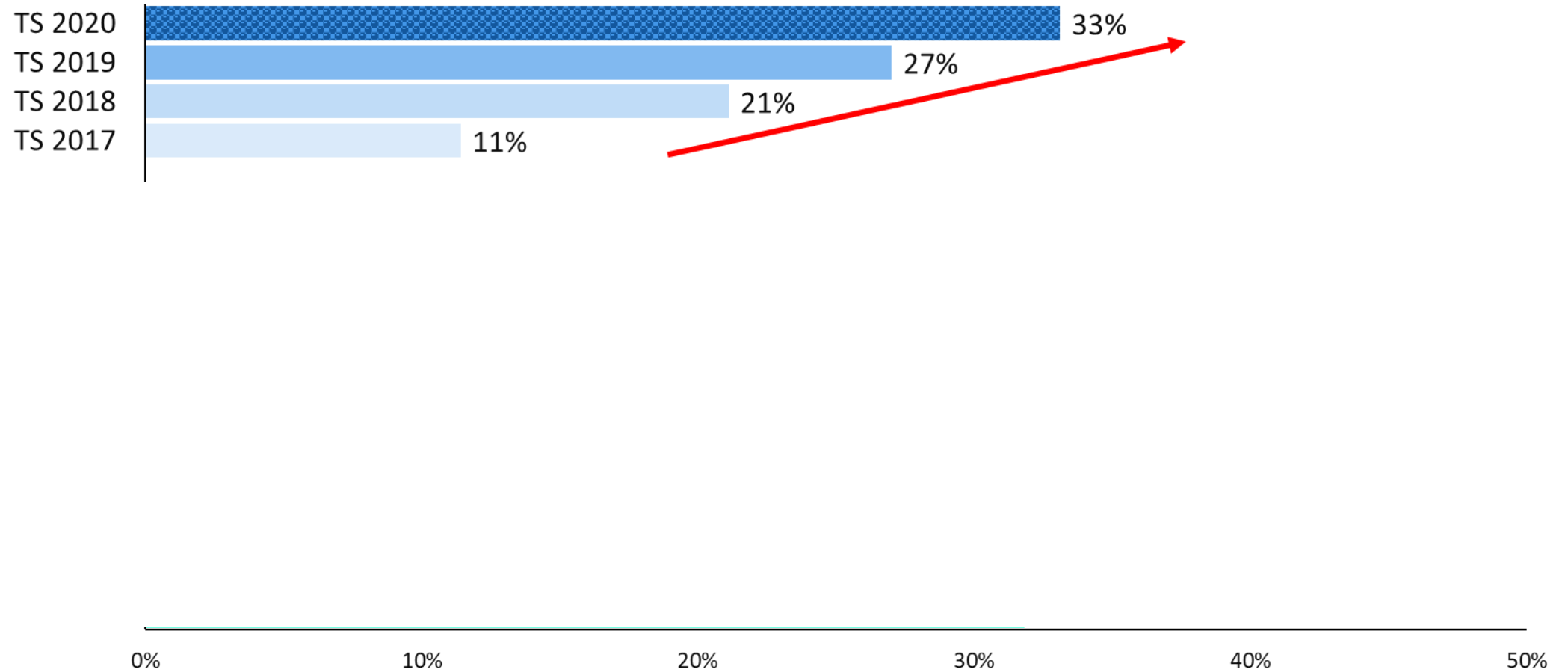
Among all respondents, % who ever use voice command features on any device

Voice Commands Ever Used



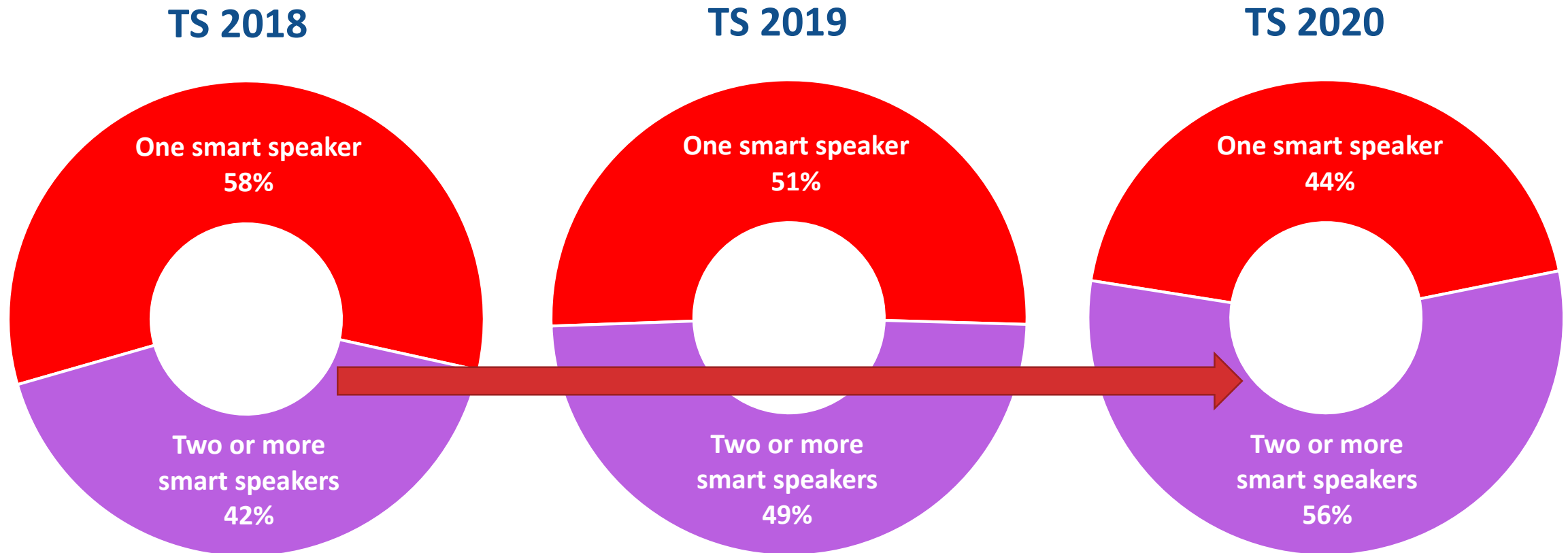
% who ever use voice commands on each device
(multiple responses accepted)

Smart Speaker Ownership

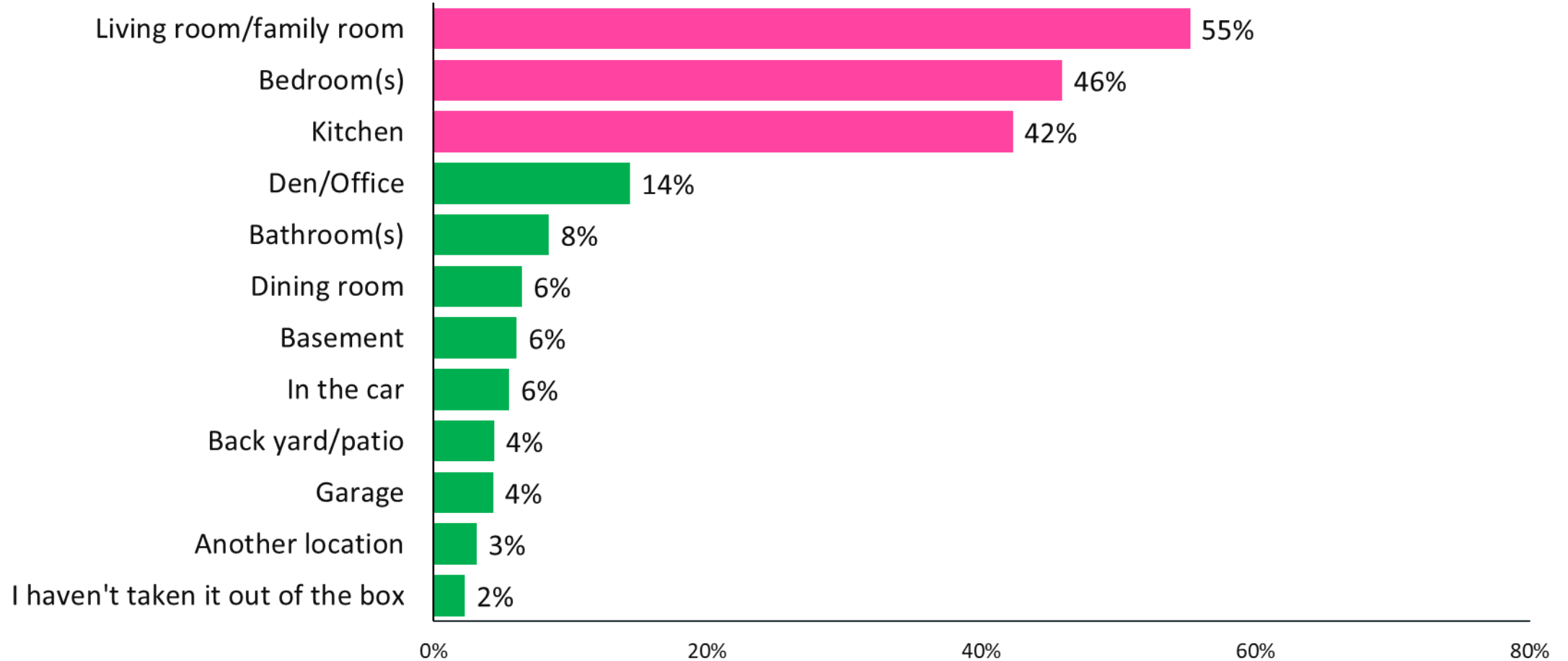


% who own a smart speaker (Amazon Alexa, Google Home, etc.)

Multiple Smart Speaker Ownership on the Rise

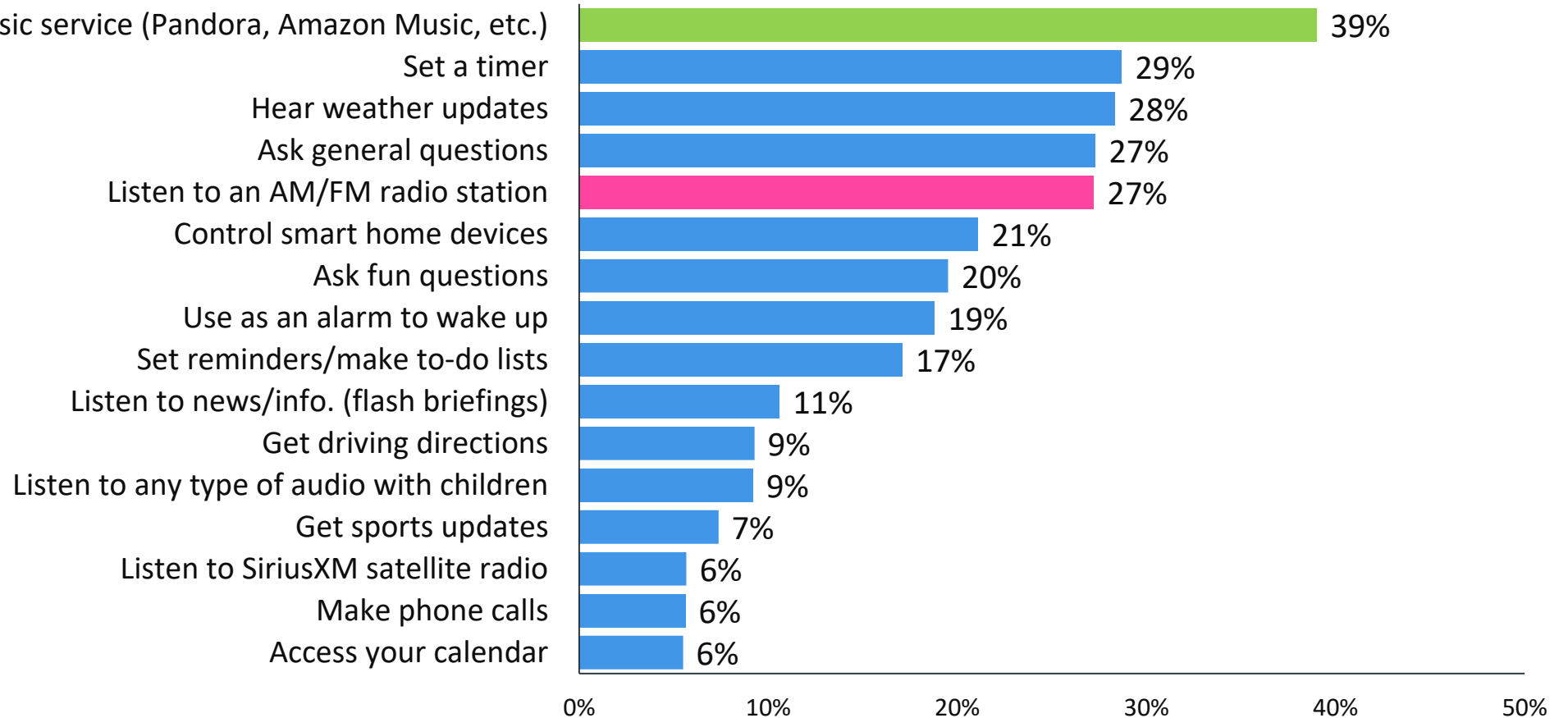


Smart Speakers Throughout the House



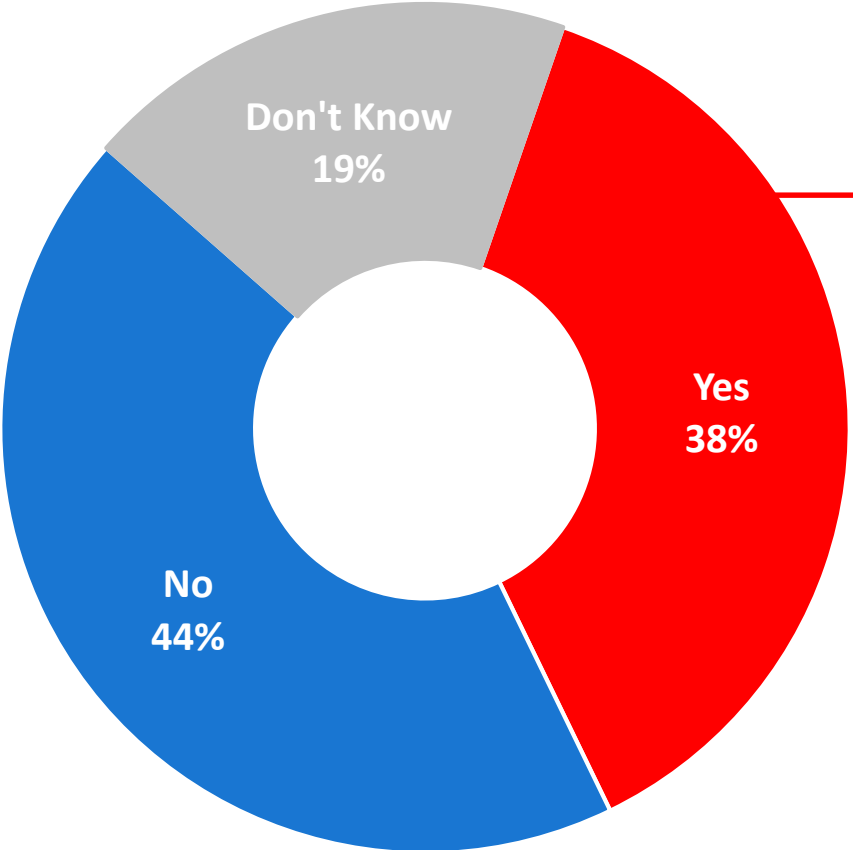
Among smart speaker owners, % who have a smart speaker in each location (multiple responses accepted)

Smart Speaker Use Cases



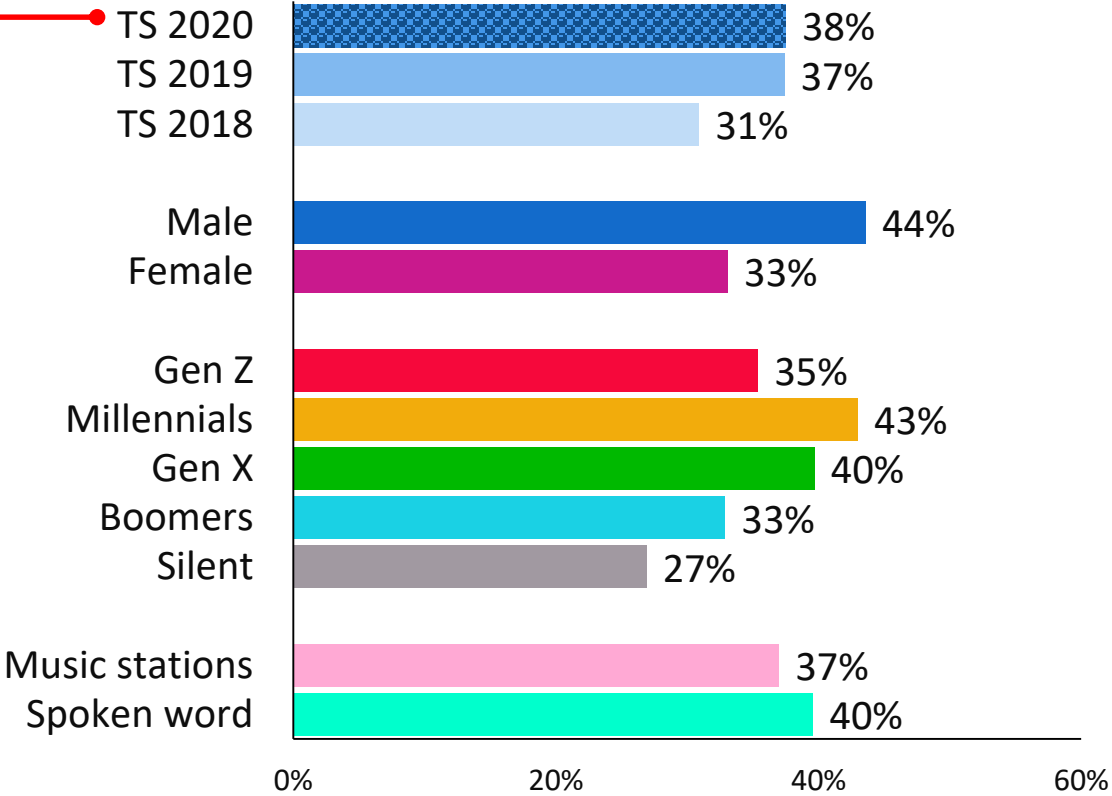
Among smart speaker owners, % who “frequently” use their device(s) in each way (most mentioned uses; 6% or more)

Smart Speaker Promotion

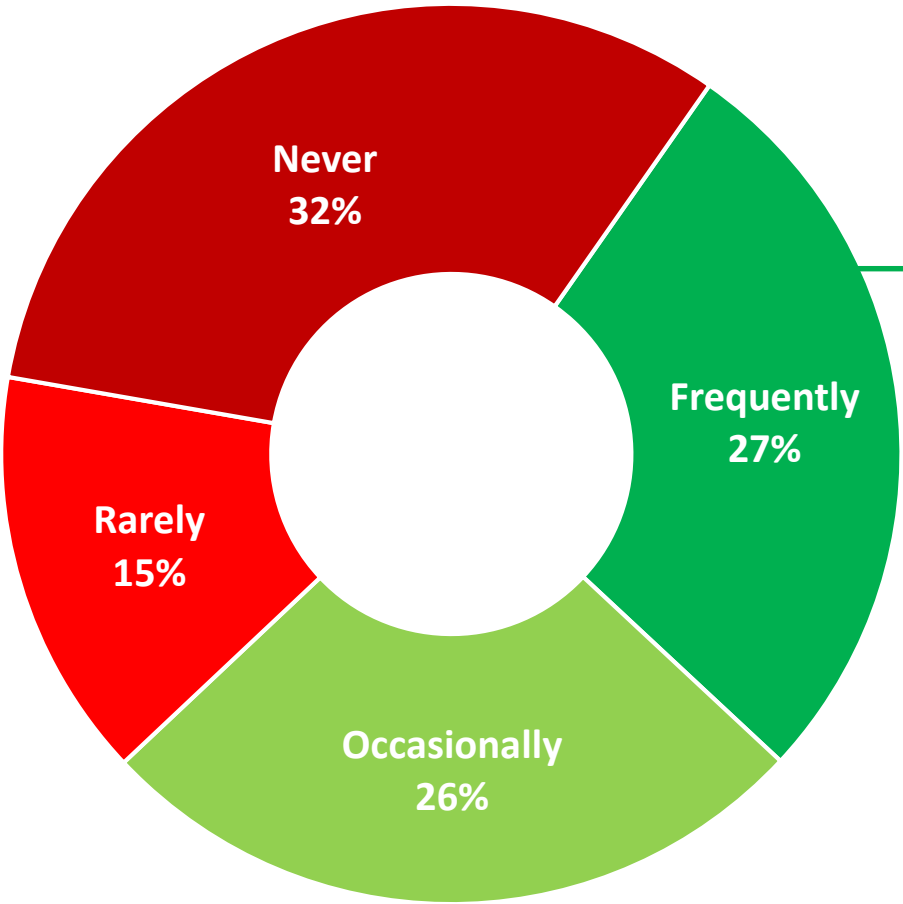


"Have you heard any AM/FM radio stations talking about or promoting smart speakers on the radio recently?"

% of Smart Speaker Owners Who Have Heard AM/FM Radio Stations Talking About/Promoting Smart Speakers Recently

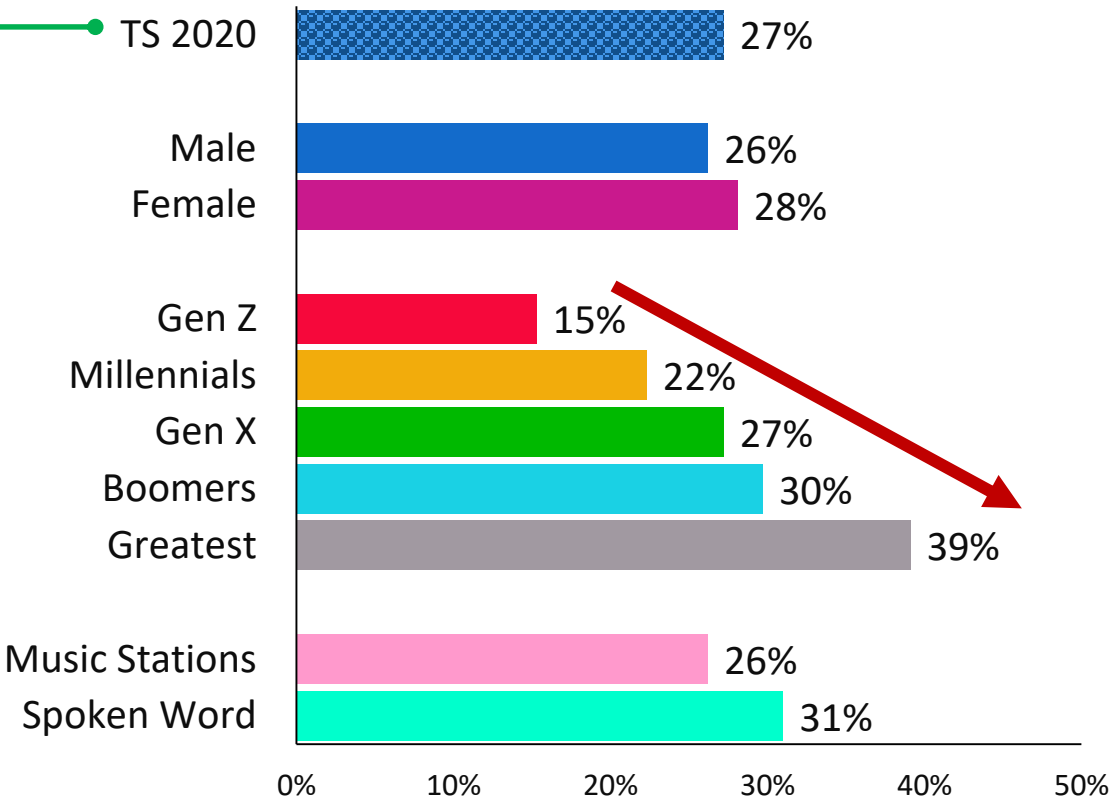


Frequent Smart Speaker Use For Radio Listening

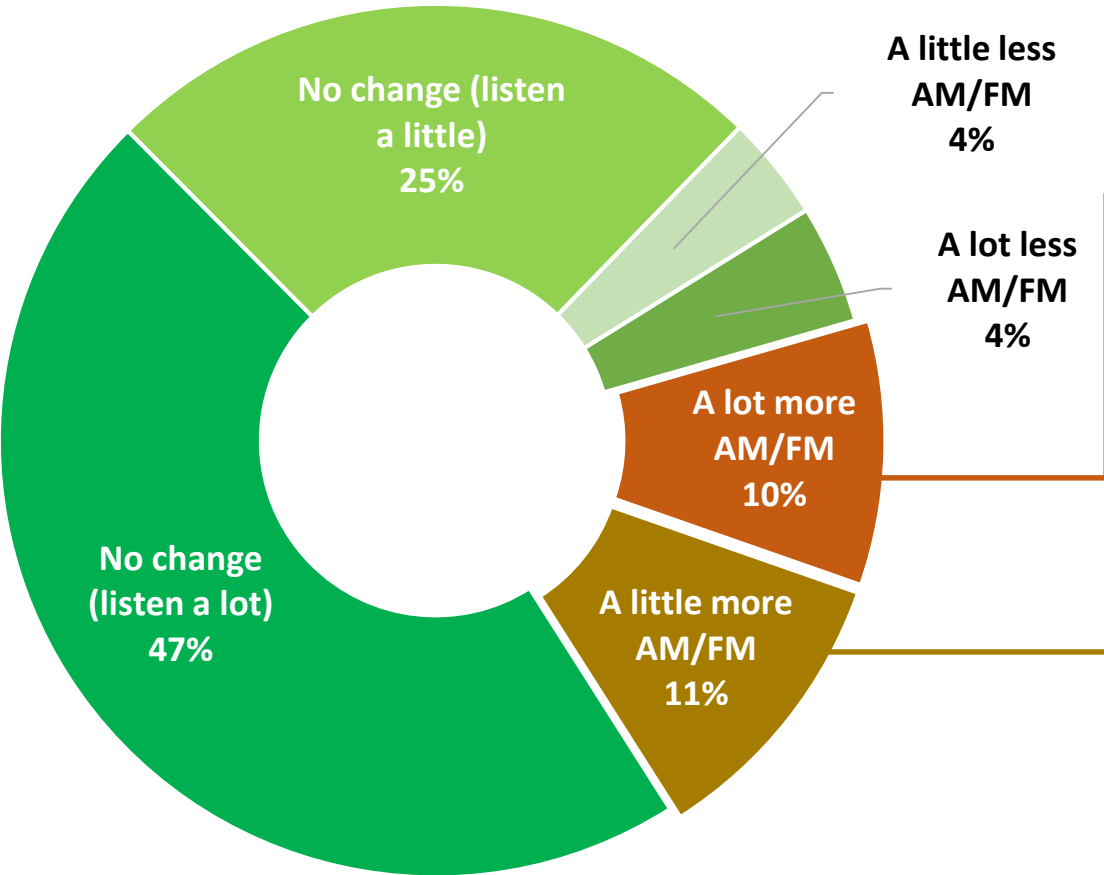


"How often do you listen to AM/FM radio stations on your smart speaker?"

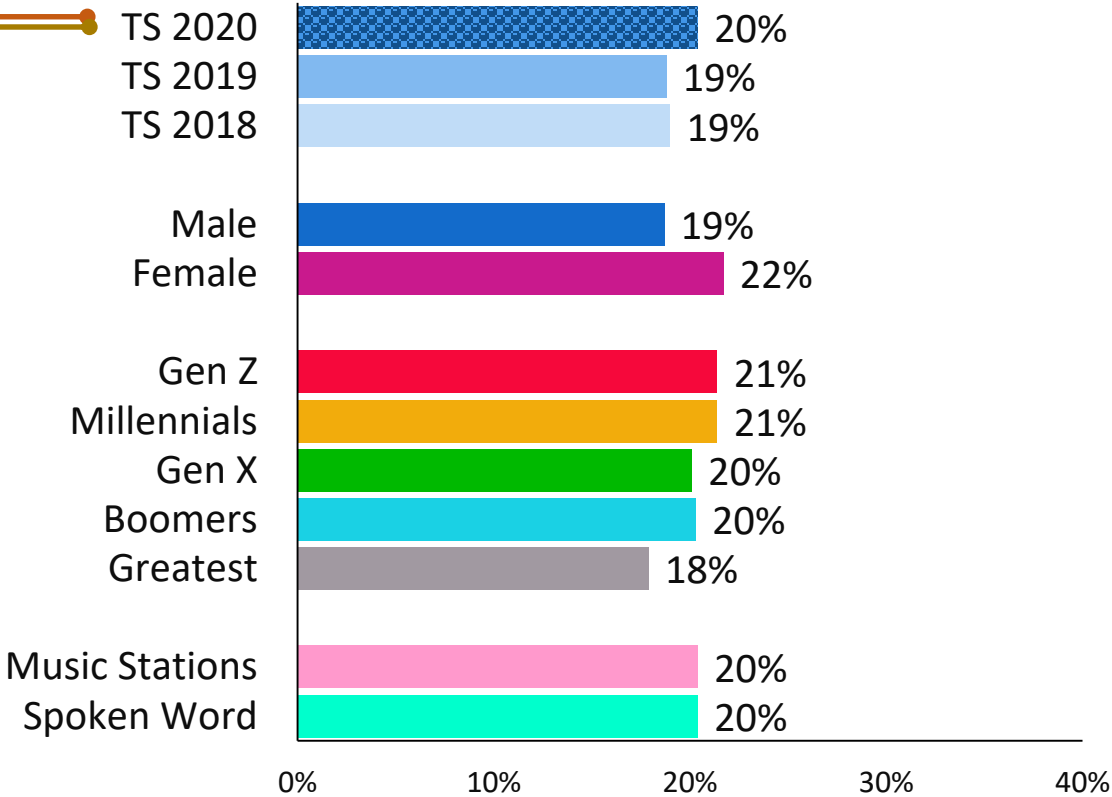
% of Smart Speaker Owners Who Frequently Listen to AM/FM Radio Stations on Their Device



Smart Speaker Impact on Radio Listening



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

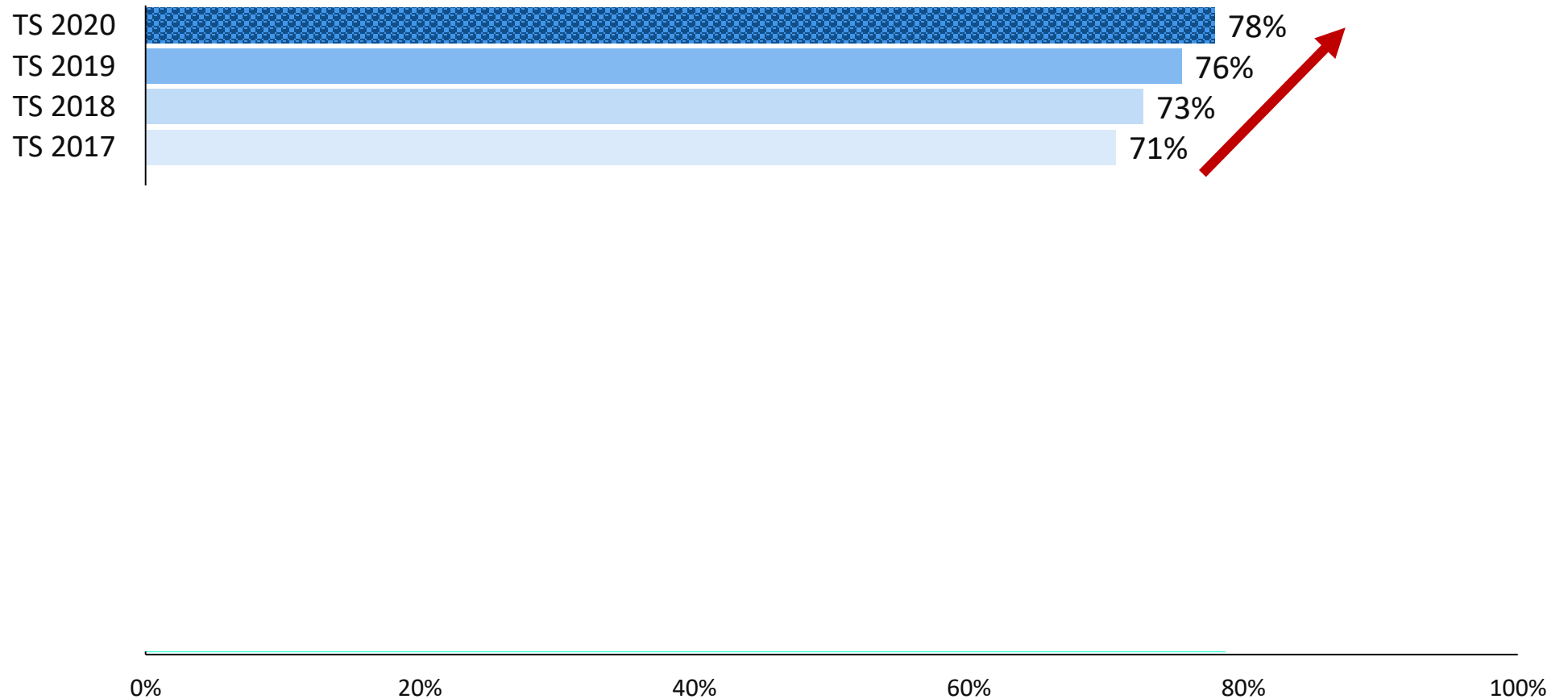


“How has your listening to AM/FM radio stations changed overall since you got a smart speaker?”



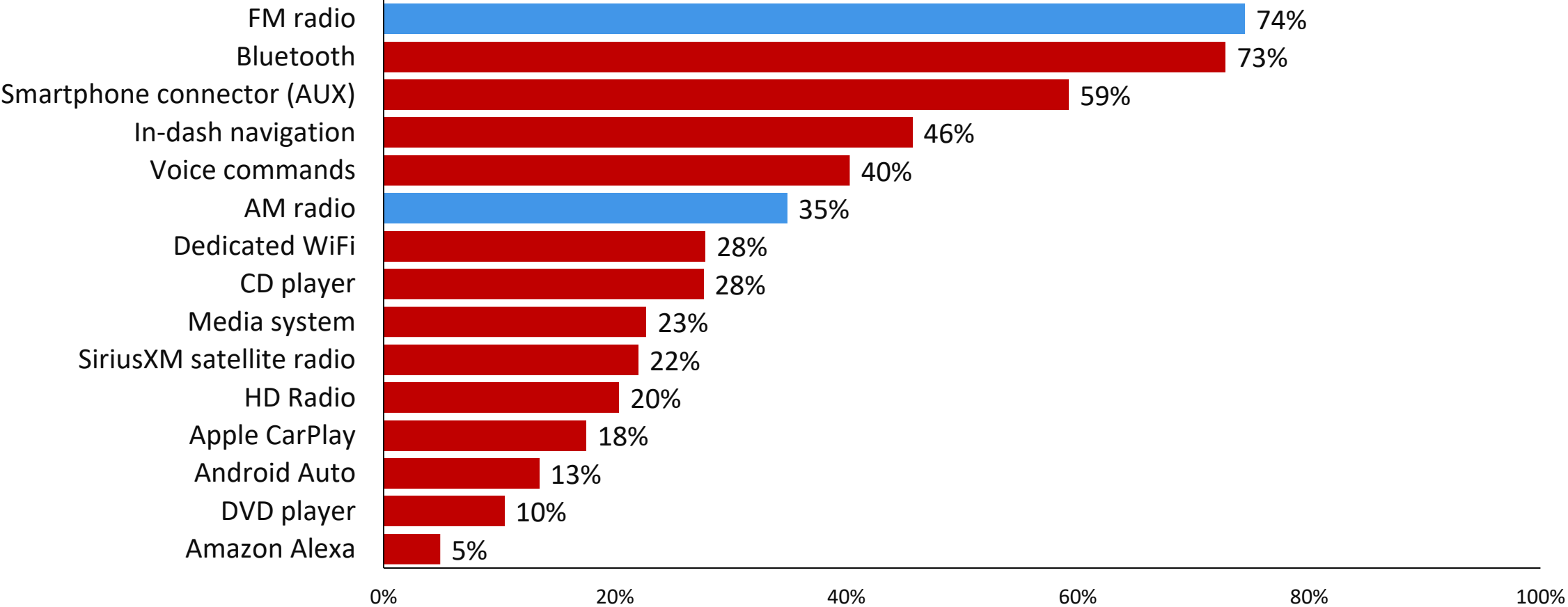
In-Car Audio

Connect Smartphone to the Car



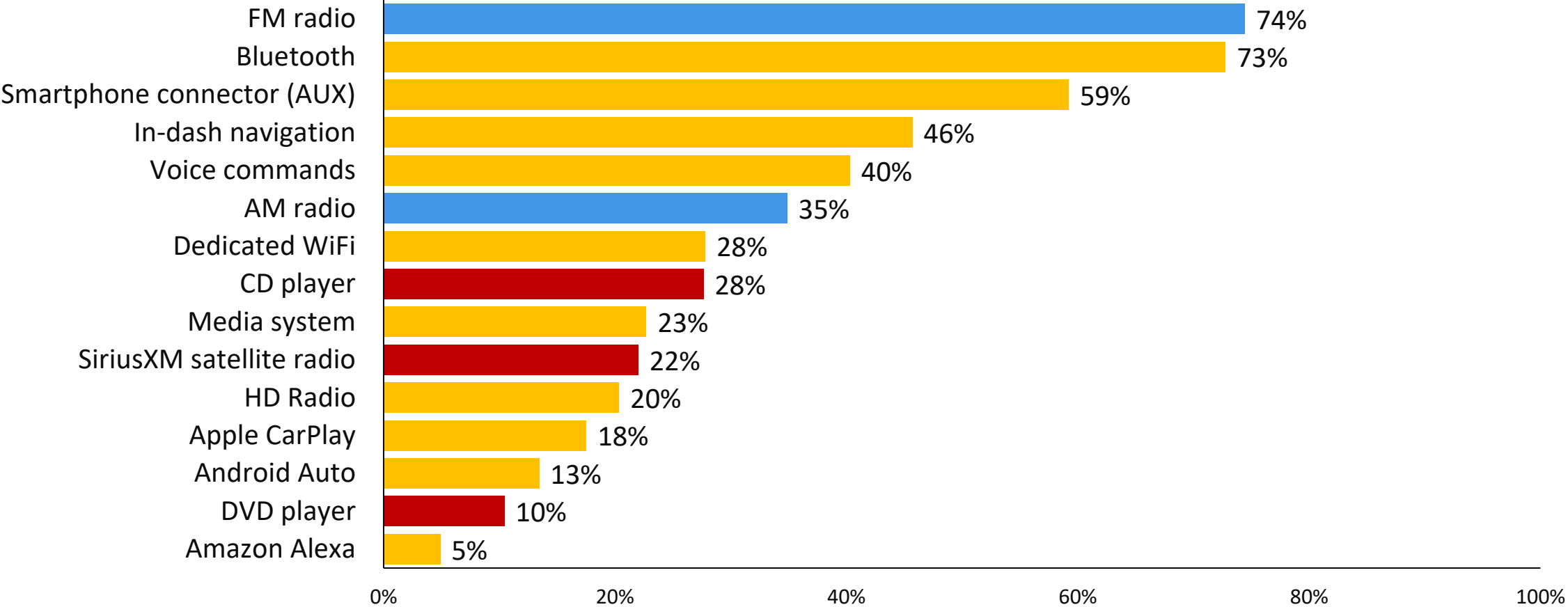
Among smartphone owners who spend time in a car,
% who have a way to connect their smartphone to their car

Most Important New Car Features



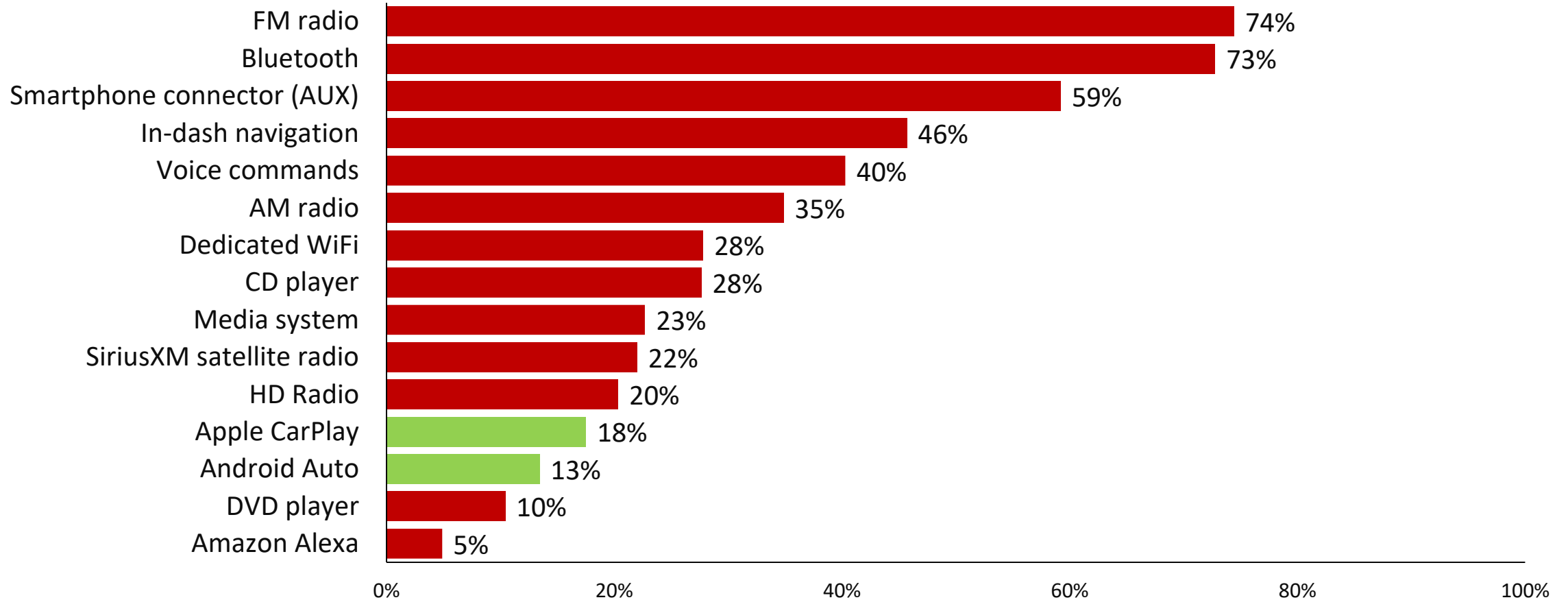
“Very Important” features among those planning on
buying/leasing (or already bought) a new vehicle in 2020

Most Important New Car Features



“Very Important” features among those planning on buying/leasing (or already bought) a new vehicle in 2020

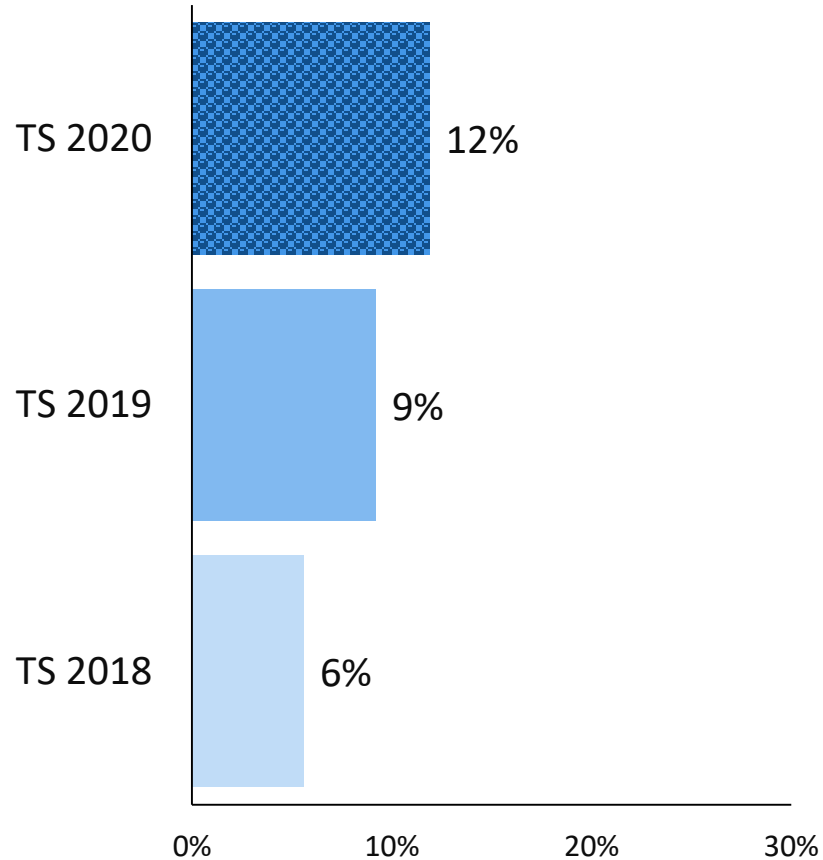
Most Important New Car Features



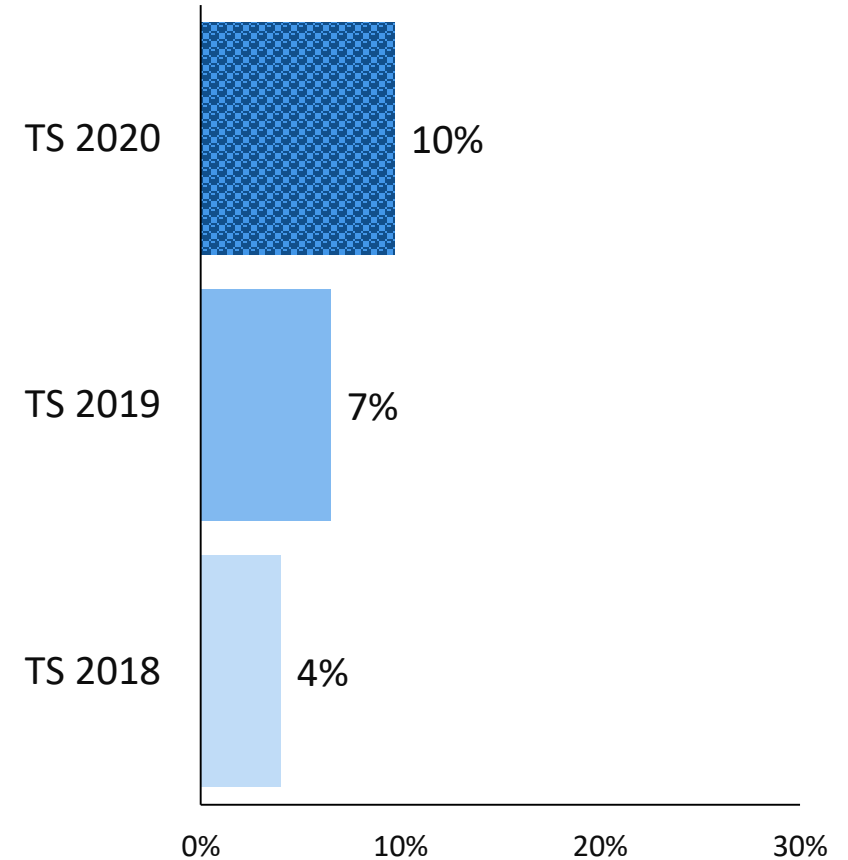
“Very Important” features among those planning on
buying/leasing (or already bought) a new vehicle in 2020

Apple CarPlay vs. Android Auto

% Who Have Apple CarPlay



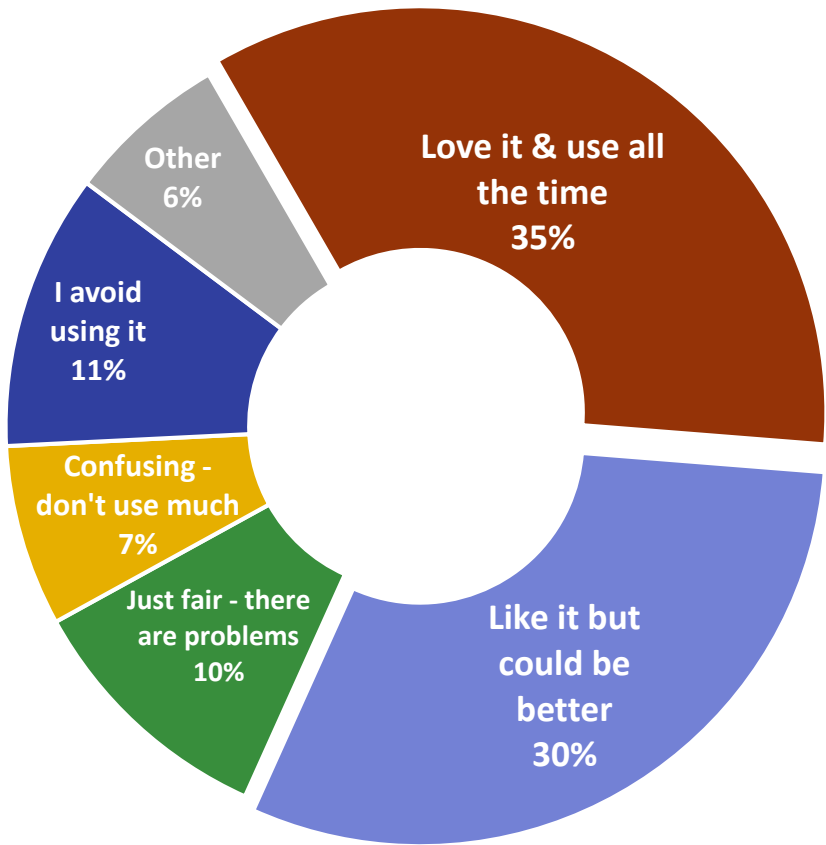
% Who Have Android Auto



Among smartphone owners who ever spend time in a car

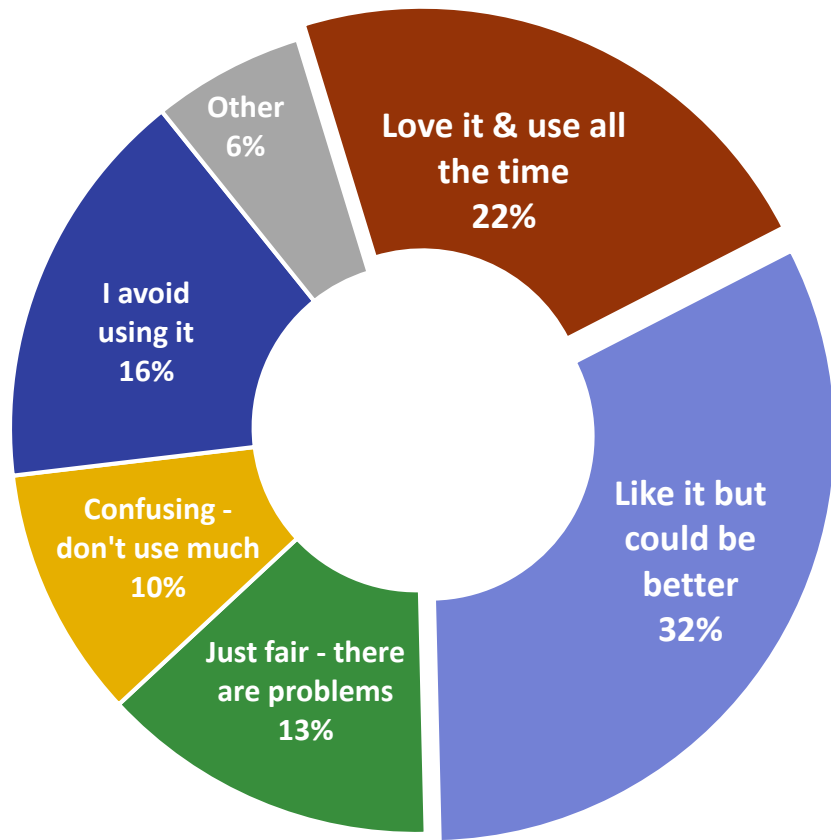
Opinions About Apple CarPlay & Android Auto

Apple CarPlay



“What is your feeling about Apple CarPlay?”

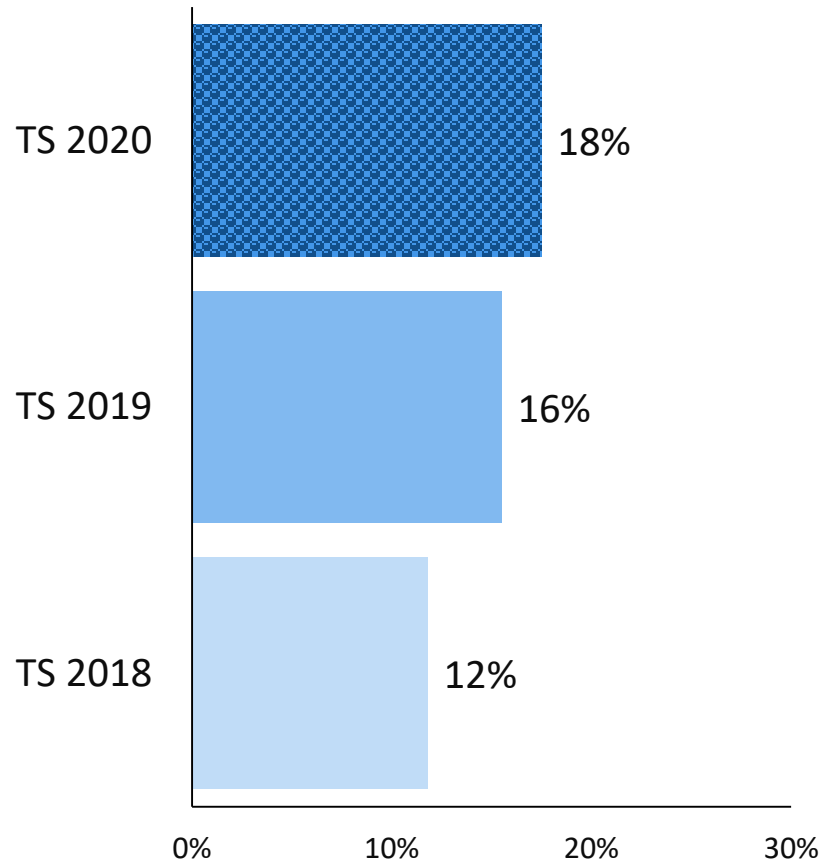
Android Auto



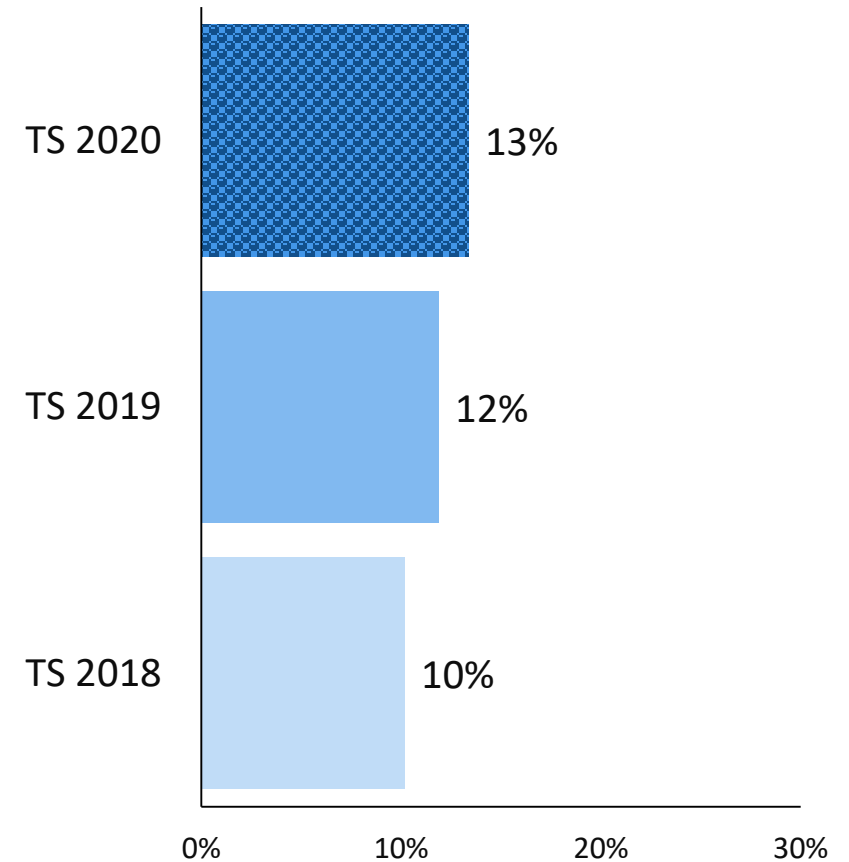
“What is your feeling about Android Auto?”

Importance of Apple CarPlay & Android Auto

% Who Say Apple CarPlay Is a “Very Important”
Feature to a New Car Purchase/Lease



% Who Say Android Auto Is a “Very Important”
Feature to a New Car Purchase/Lease

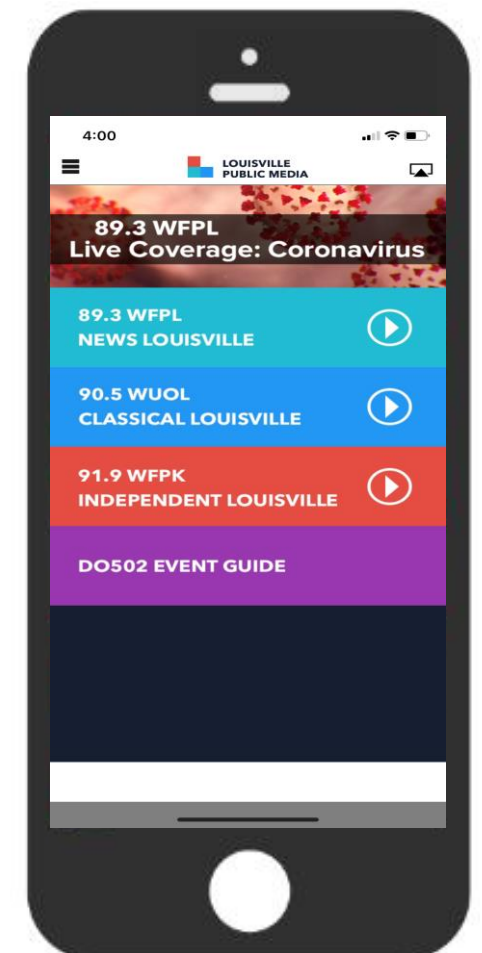
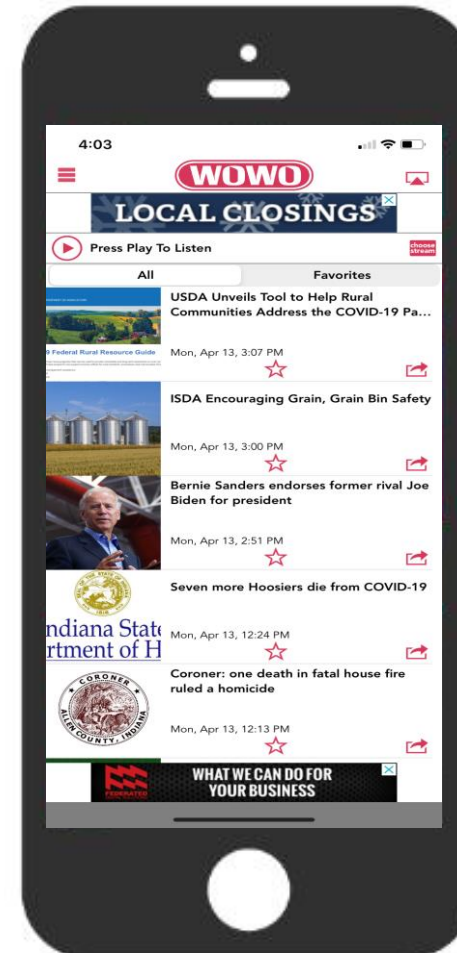
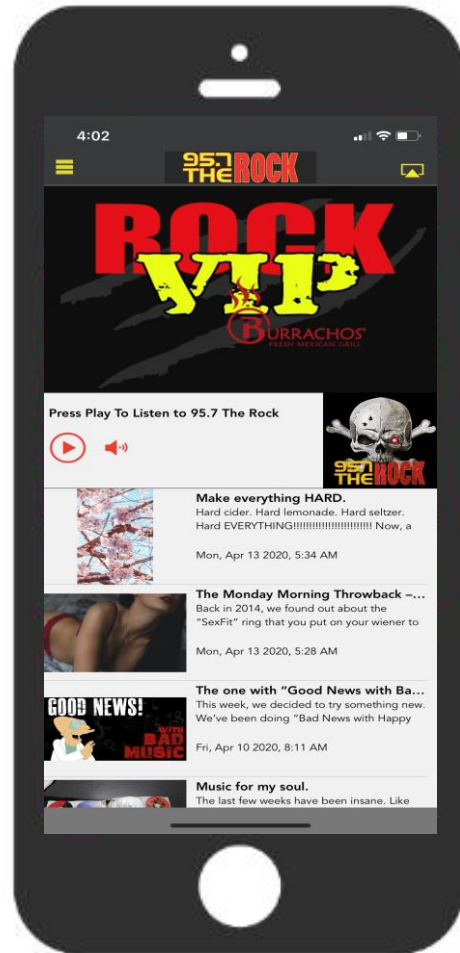


Among those planning on buying/leasing (or already bought) a new vehicle in 2020

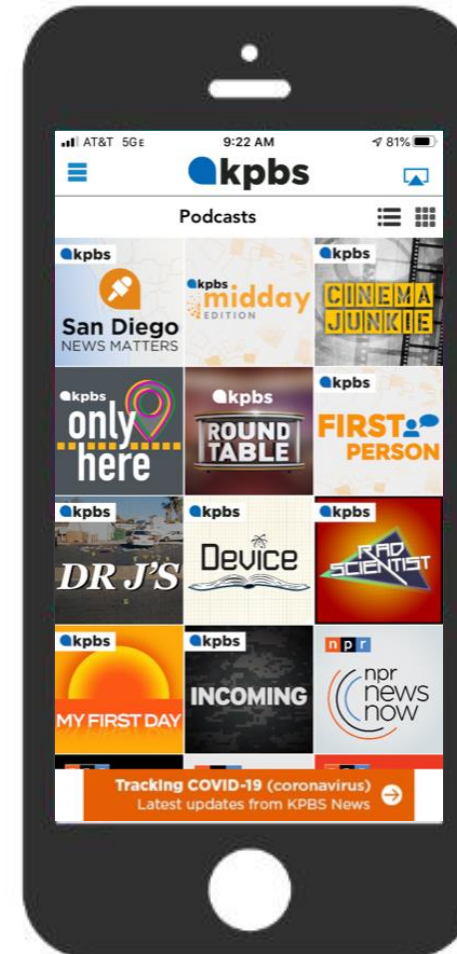
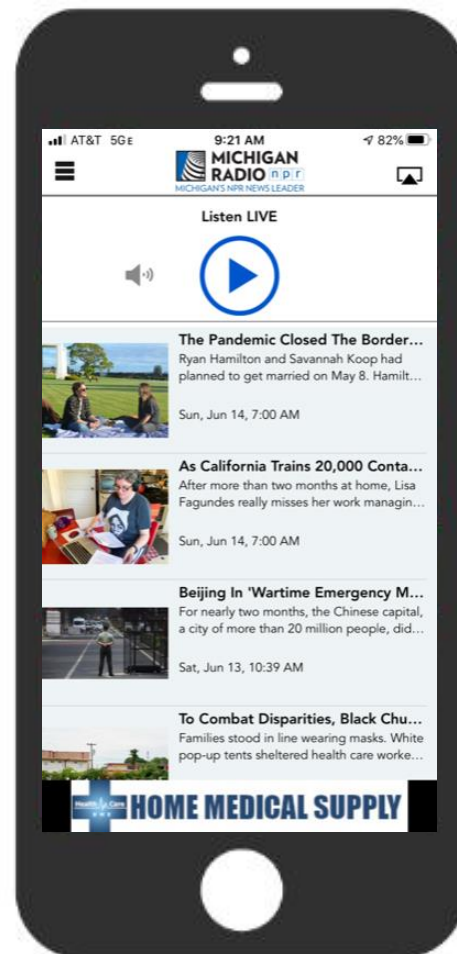
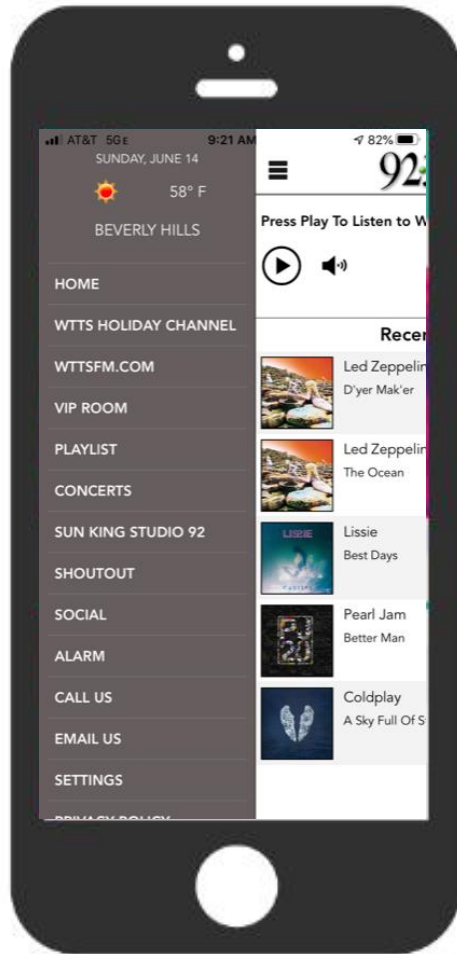


Key Takeaways

A Great App Experience Is More Important Than Ever



Individual Apps vs. Aggregated Apps



Strong, Clear, Consistent Promotion



Prepare to Be Everywhere

HOW TO LISTEN TO US

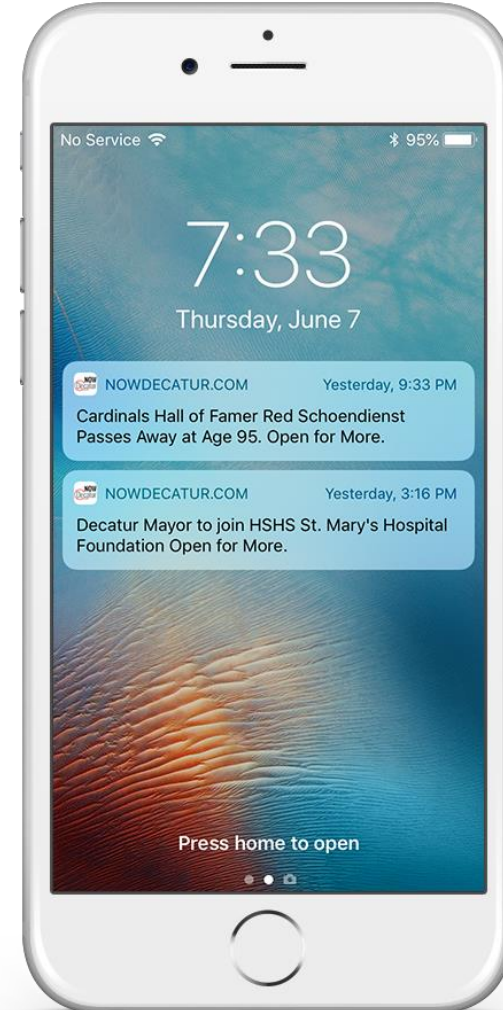
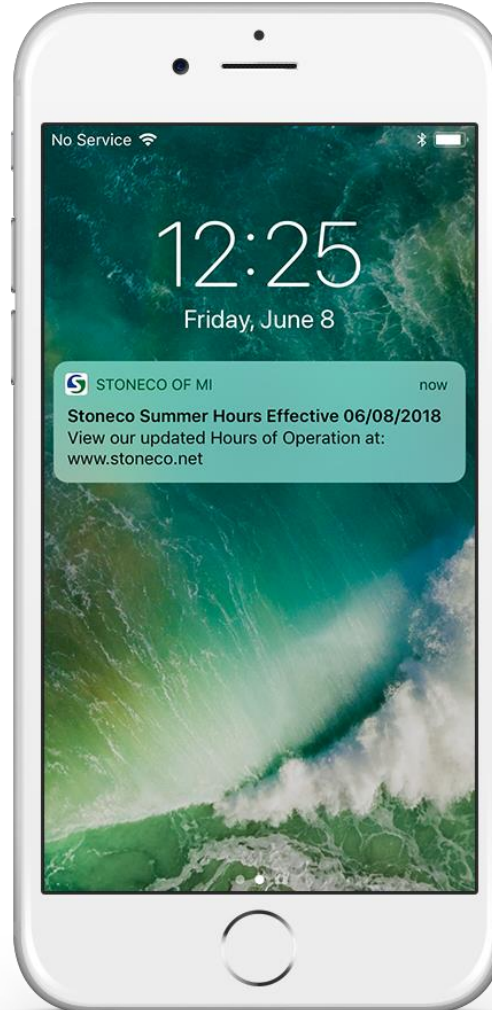


There are many ways you can enjoy Star 104.5, at home, in your car, or on the go...

Take Your Station on Vacation This Summer



"Push" Activates Listening, Contests, Breaking News



The Car Is Still King



But WFH Is Here to Stay



Limited Time Offer



Buy an app, get a skill

- Contact Sari Zalesin, Director of Business Development

sari@jacapps.com // 248-530-6018

The Mobile Opportunity for Radio in Challenging Times

How Apps & Smart Speakers Are
Changing the Way We Listen to Radio



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