



# The Changing Media Landscape

# Methodology

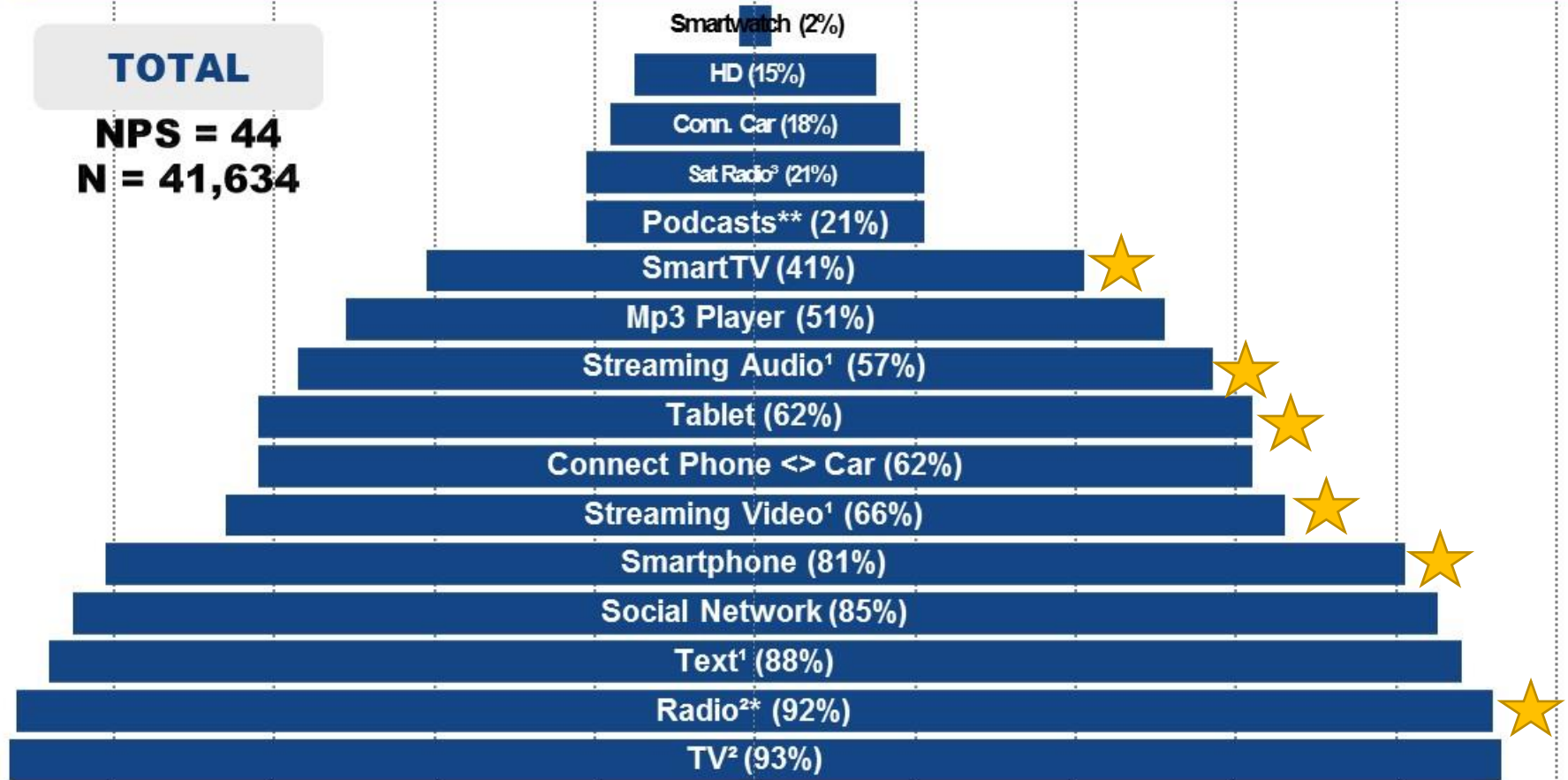
- 220 radio stations in the U.S. & Canada
- N = **41,634**
- Interview dates: January 19 – February 9, 2015
- Most respondents are members of station email databases. Some responses were gathered via station websites and/or social networking pages.
- All responses were collected online and weighted using Fall '14 M-S metro population data.
- Many changes this year – question form & format. An older skewing sample & new generation definitions. Thus, less year-to-year trending.
- This is a web survey & does not represent all radio listeners or even each station's audience. It is not stratified to the U.S./Canadian populations.



# Media Usage Pyramid 2015

**TOTAL**

**NPS = 44**  
**N = 41,634**

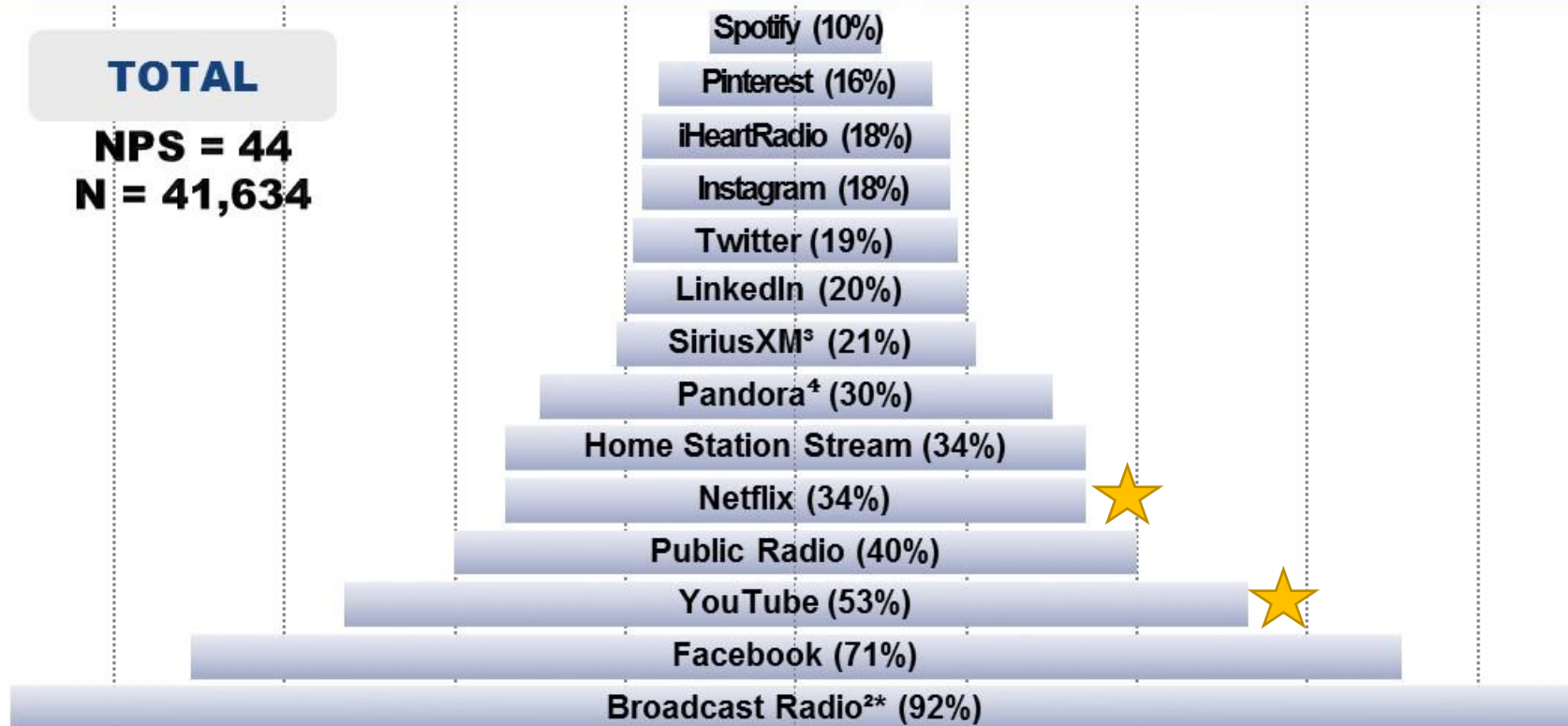


Weekly or more<sup>1</sup> 1+ hour per day<sup>2</sup> Paid & trial users<sup>3</sup> Monthly<sup>\*\*</sup> Any Platform/Device<sup>\*</sup>

# Brand Platform Pyramid 2015

**TOTAL**

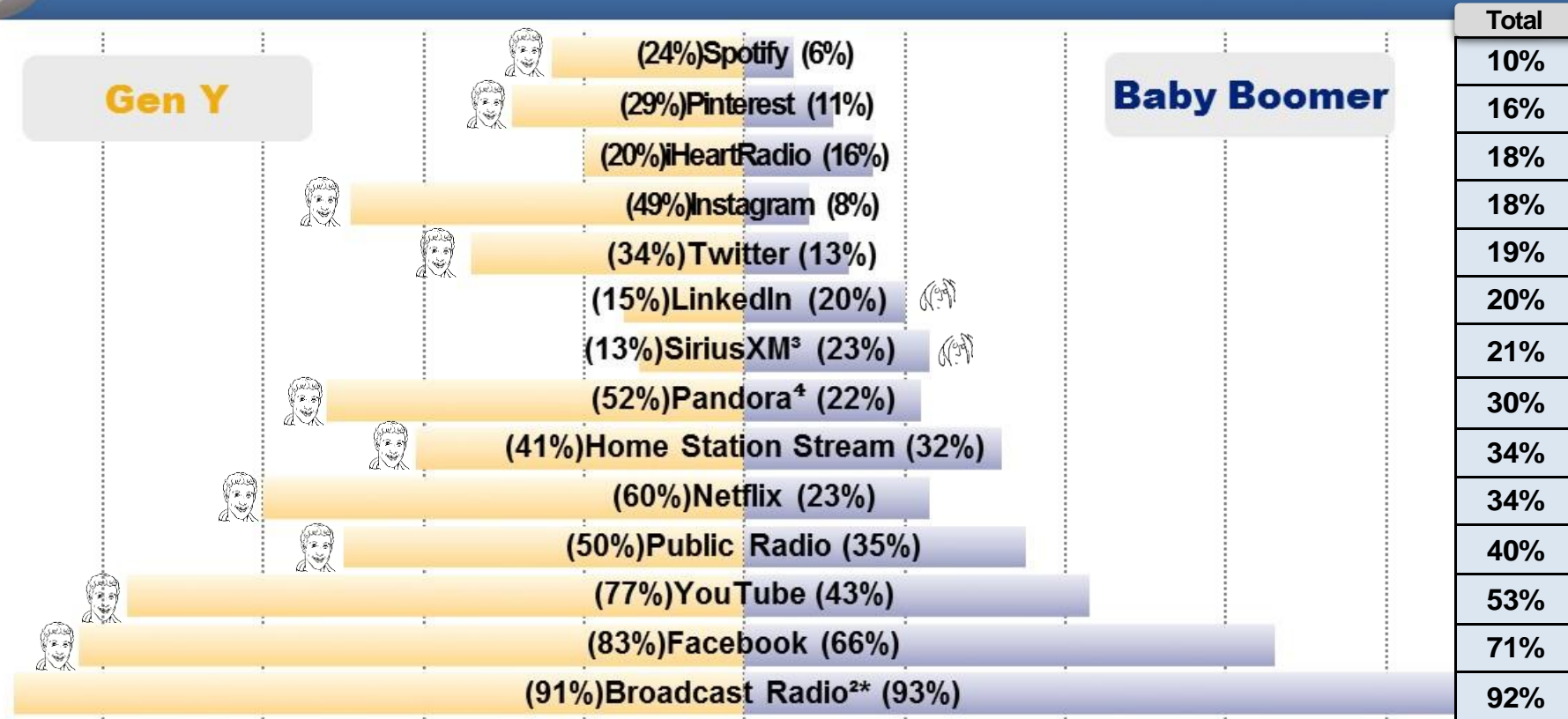
**NPS = 44**  
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All based on weekly use unless otherwise noted 1+ hour per day<sup>2</sup> Paid & trial users<sup>3</sup> Excluding Canada<sup>4</sup> Any Platform/Device\*

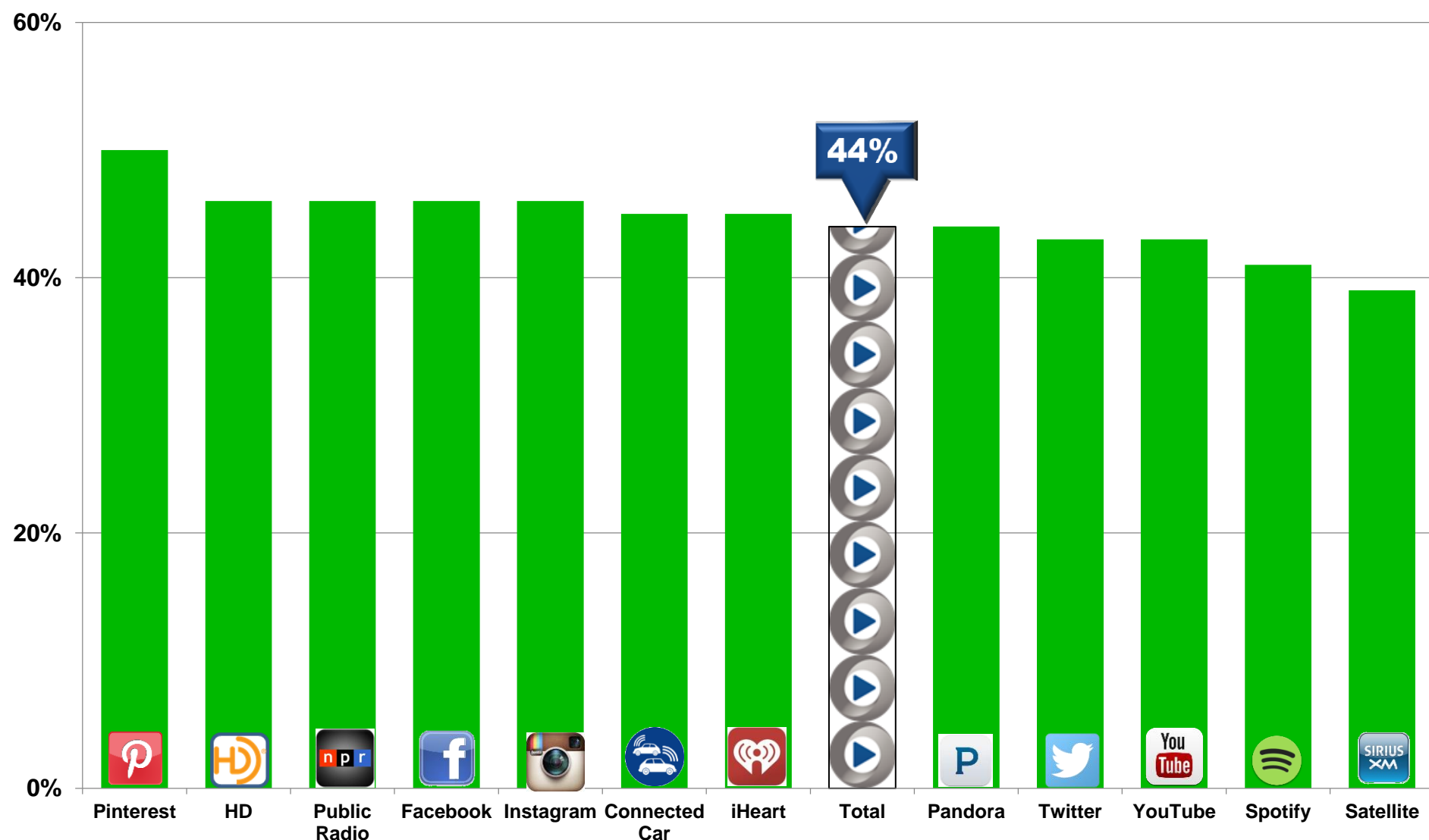


# Brand Platform Pyramid 2015



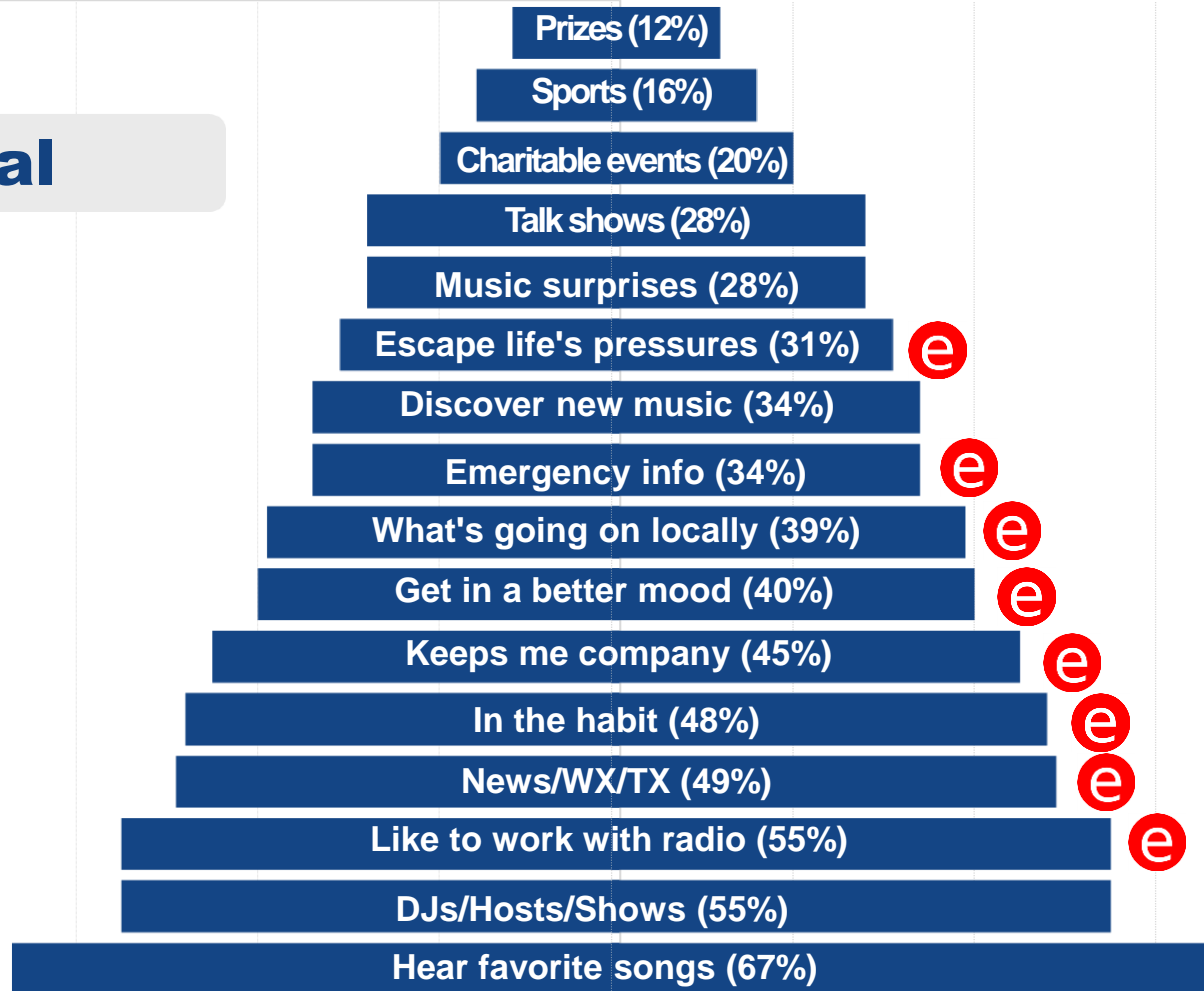
All based on weekly use unless otherwise noted 1+ hour per day<sup>2</sup> Paid & trial users<sup>3</sup> Excluding Canada<sup>4</sup> Any Platform/Device<sup>\*</sup>

# Weekly users of brands like YouTube & Pandora are just as likely to recommend radio stations.



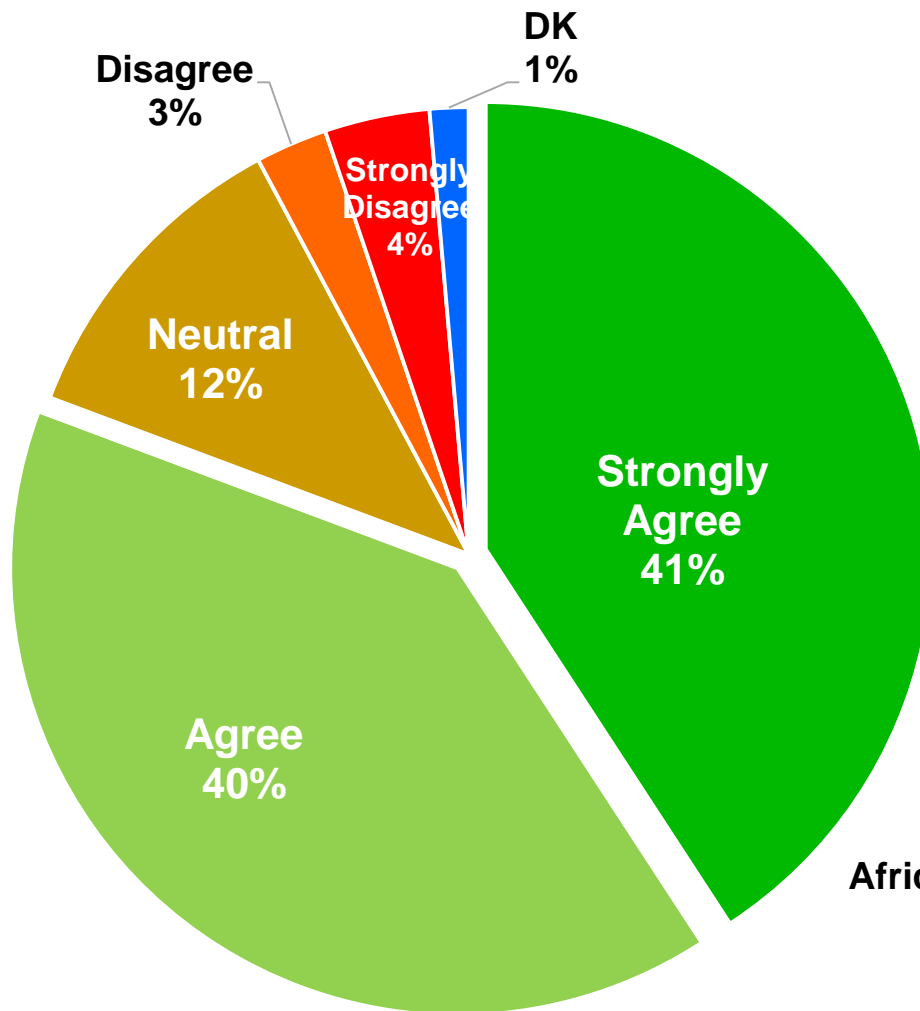
# Beyond playing the hits & personality, radio provides many strong “emotional benefits.”

**Total**

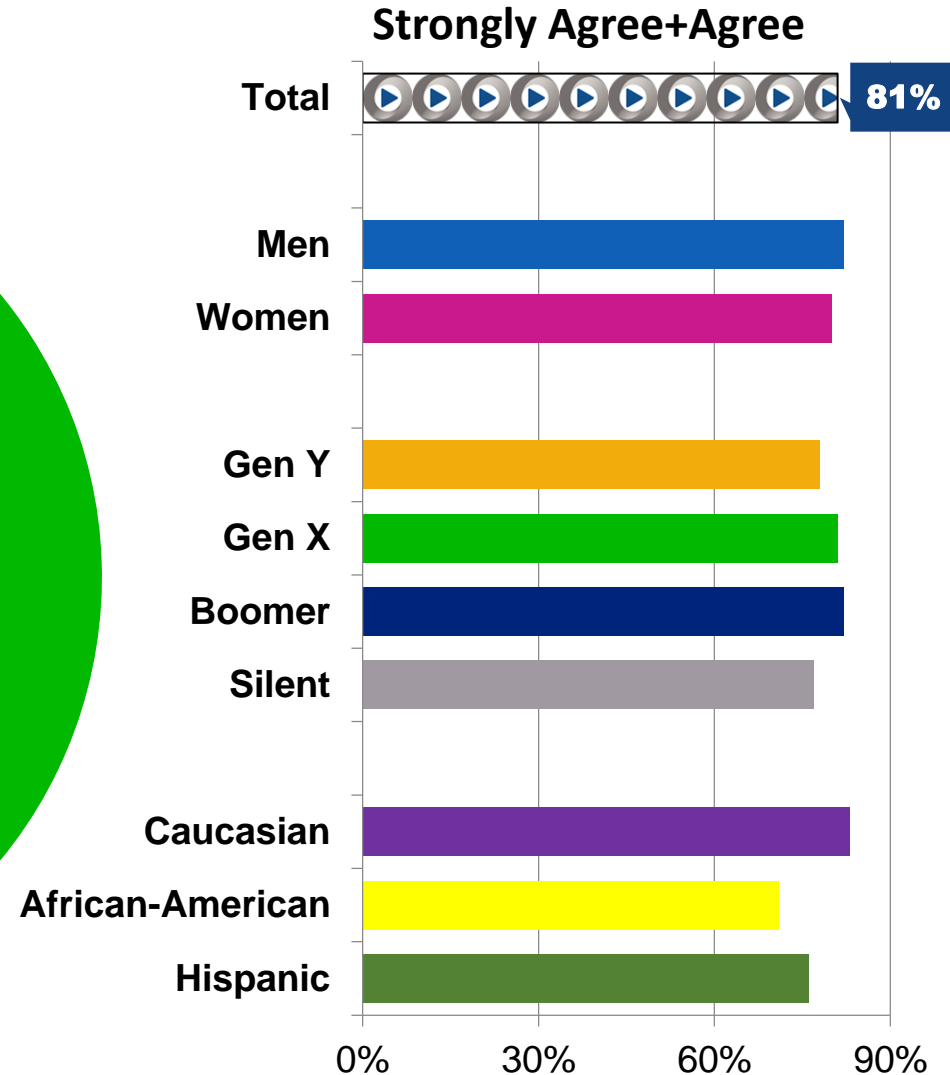


**Main Reason**

# Local truly matters to radio listeners.

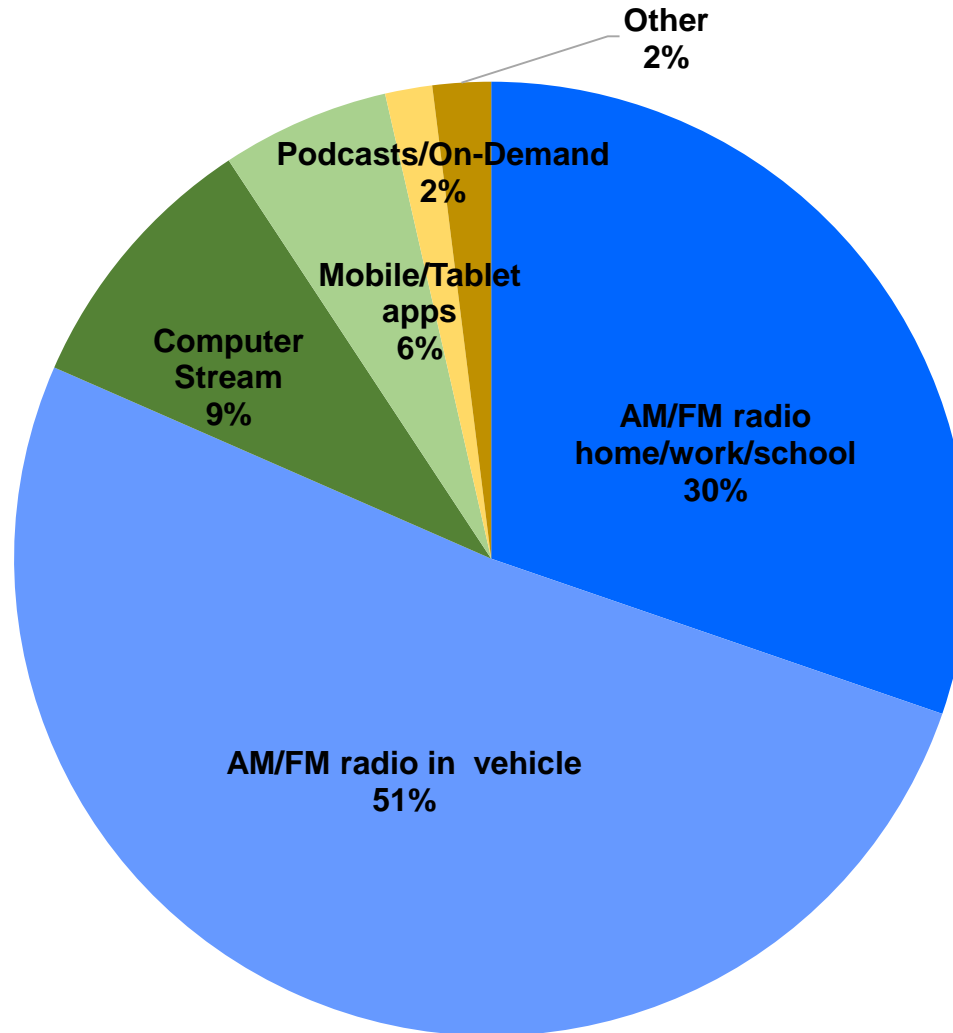


“One of radio’s primary advantages is its local feel.”



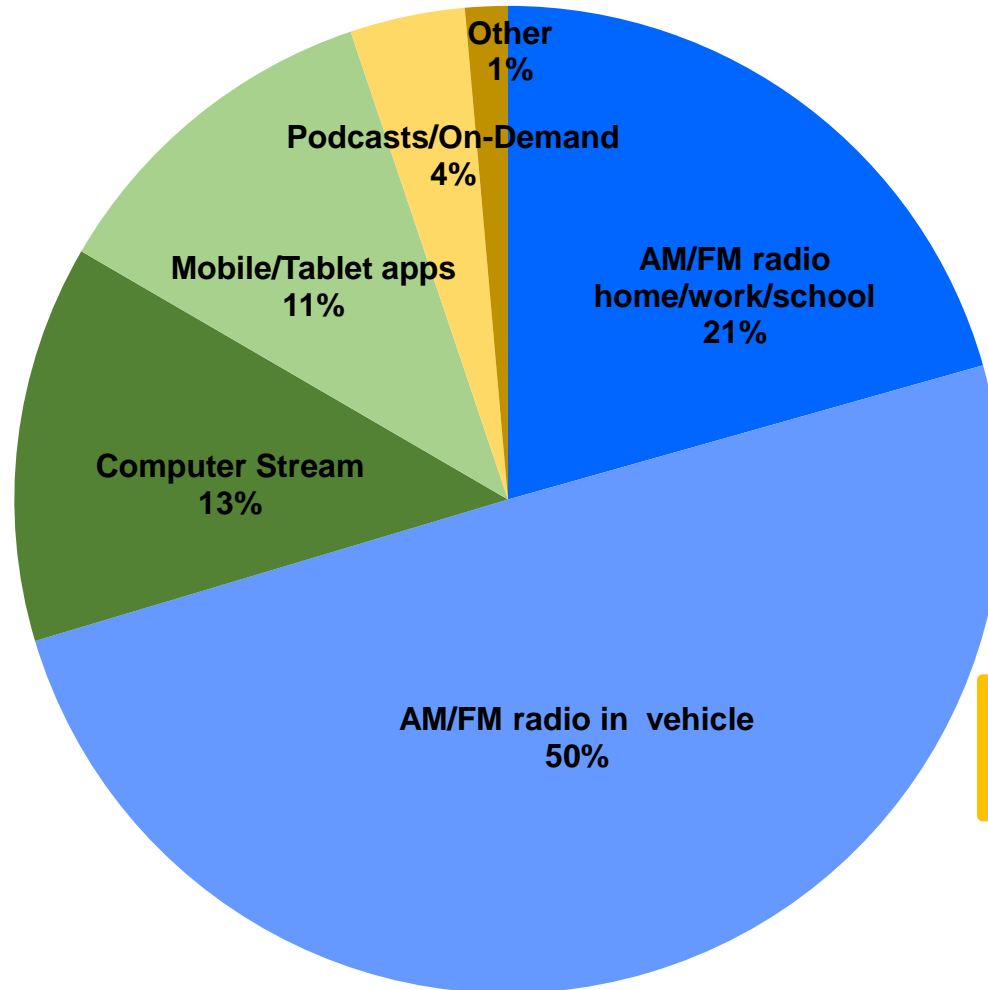


# Radio continues to make the digital transition as 17% of weekly usage takes place on digital sources.



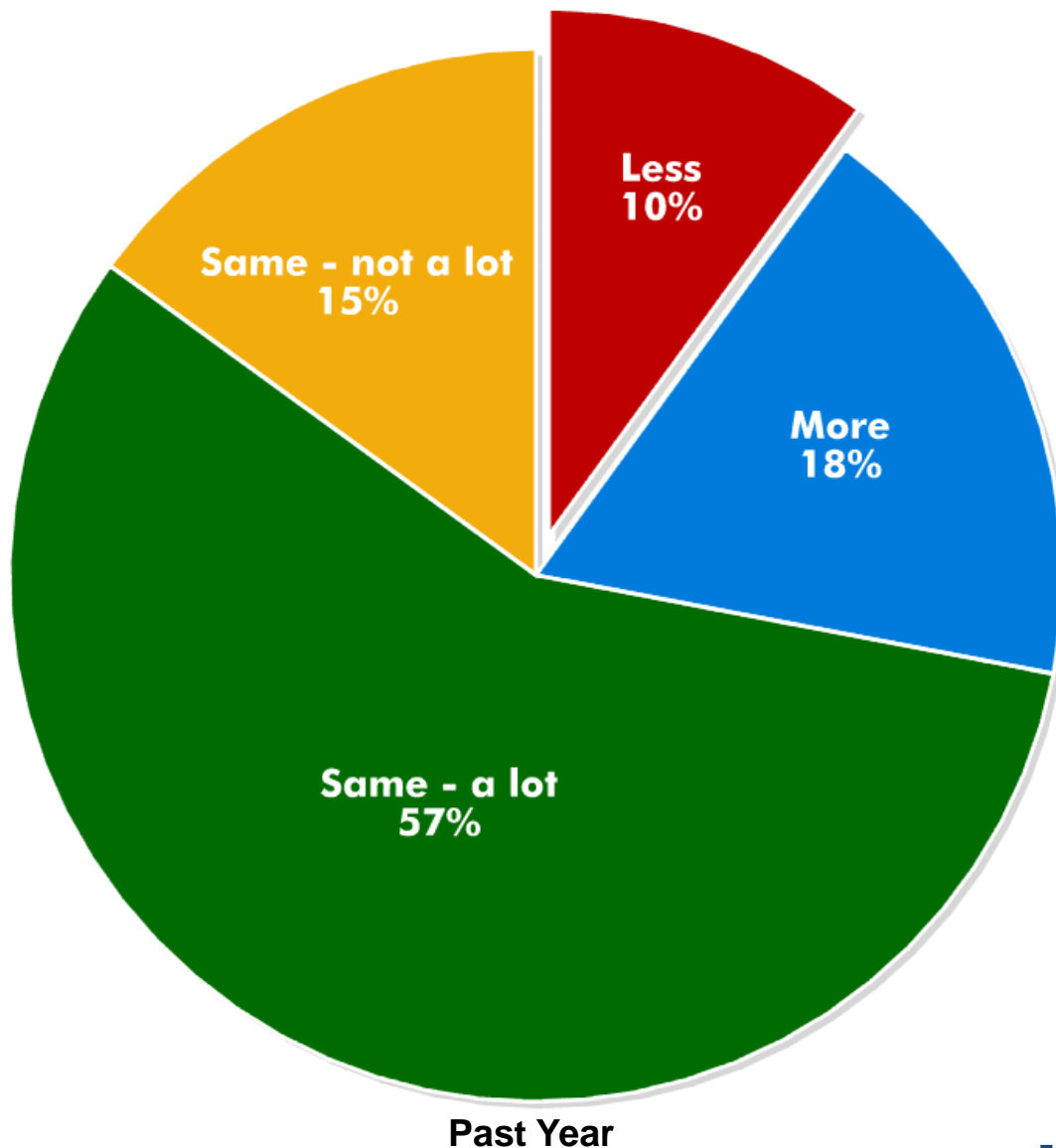
**Traditional – 81%**  
**Digital – 17%**

# Sports Radio fans are especially apt to access their stations digitally – especially mobile.

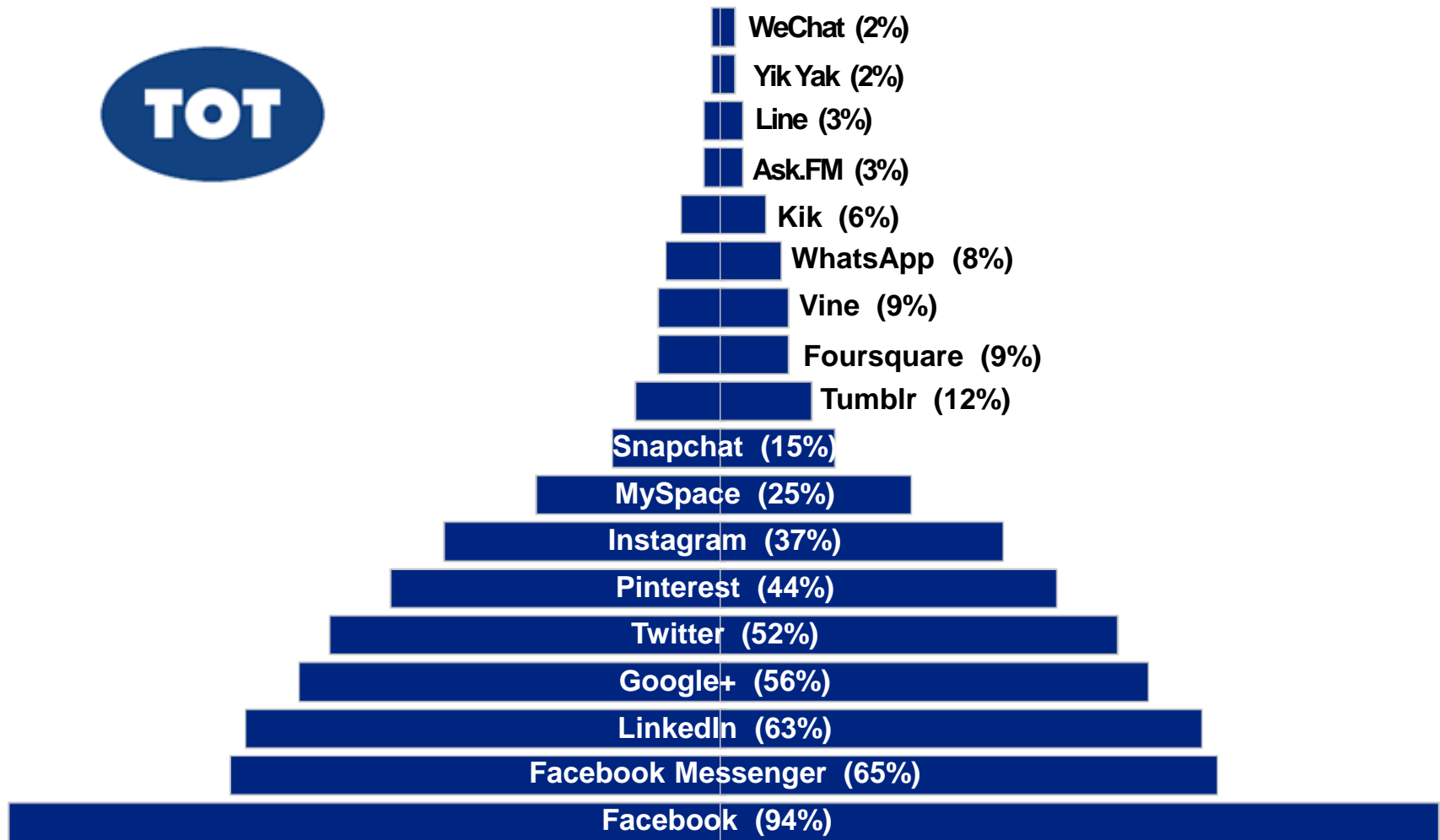


**Traditional – 71%**  
**Digital – 28%**

# Radio has momentum – by nearly a 2:1 margin year to year

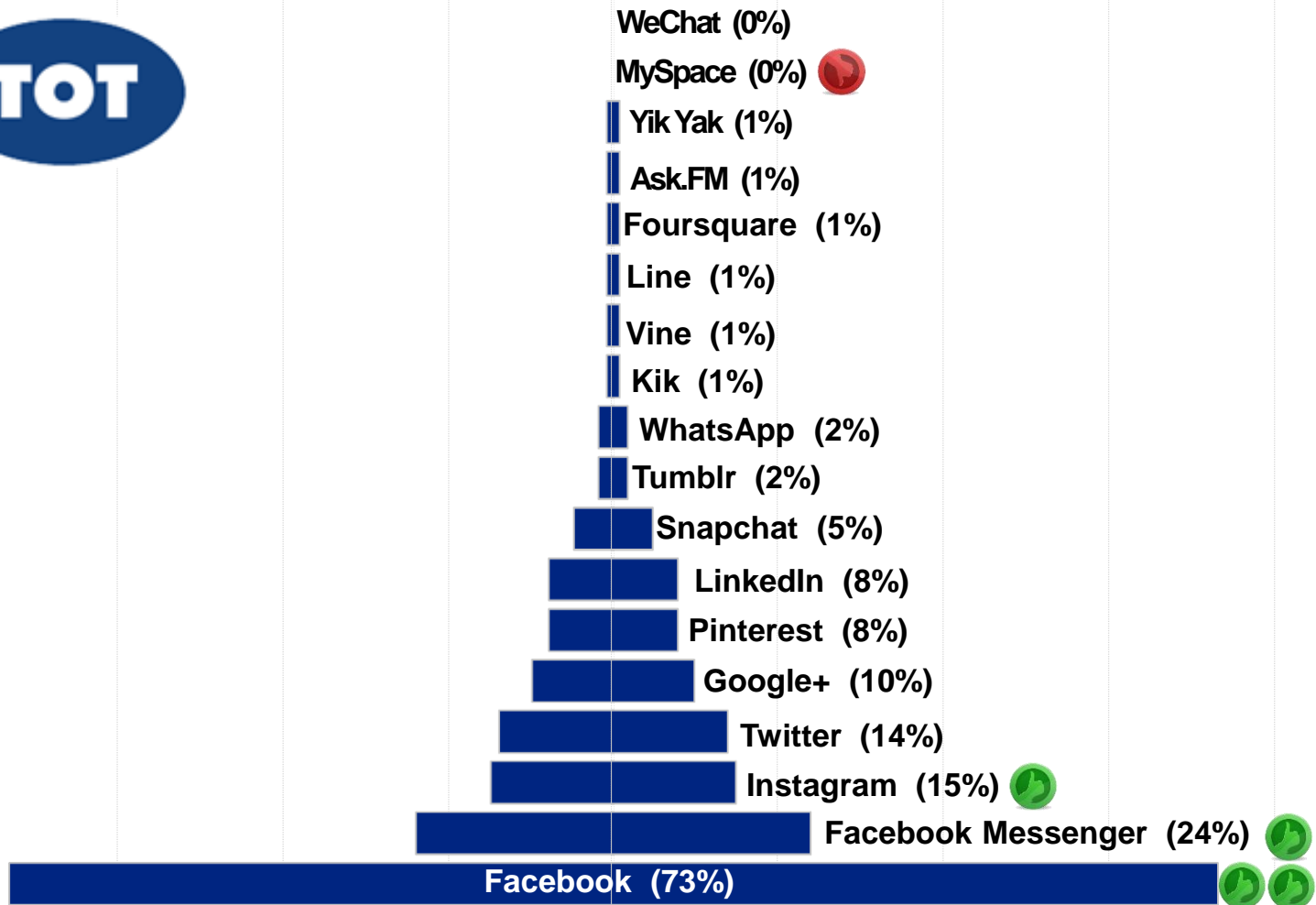


# Facebook dominates, but several other social platforms are popular with at least half the sample among those with social profiles.



Of those with a social media profile

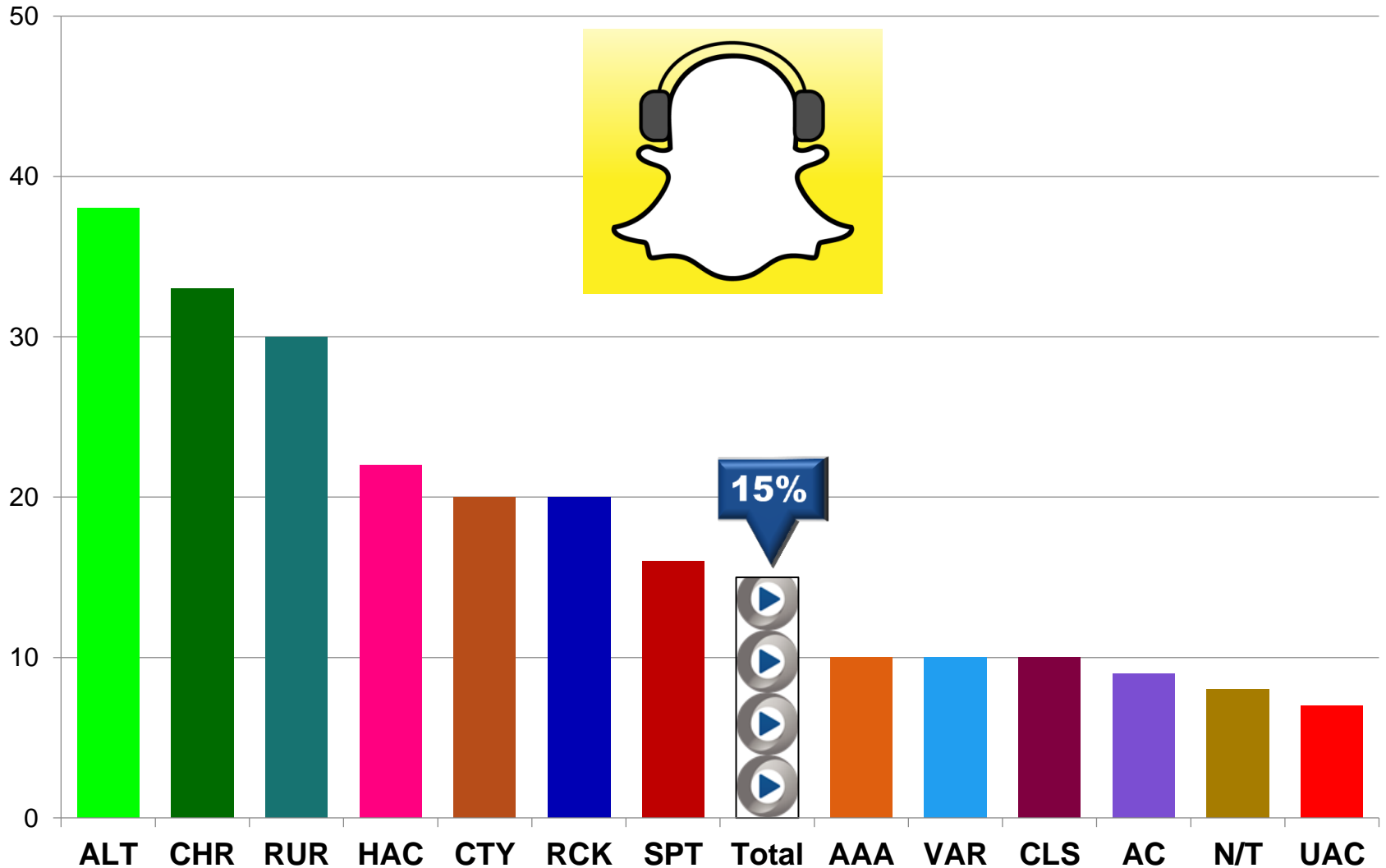
# And when it comes to daily “regularity,” Facebook stands alone.



Among those with a profile on each platform

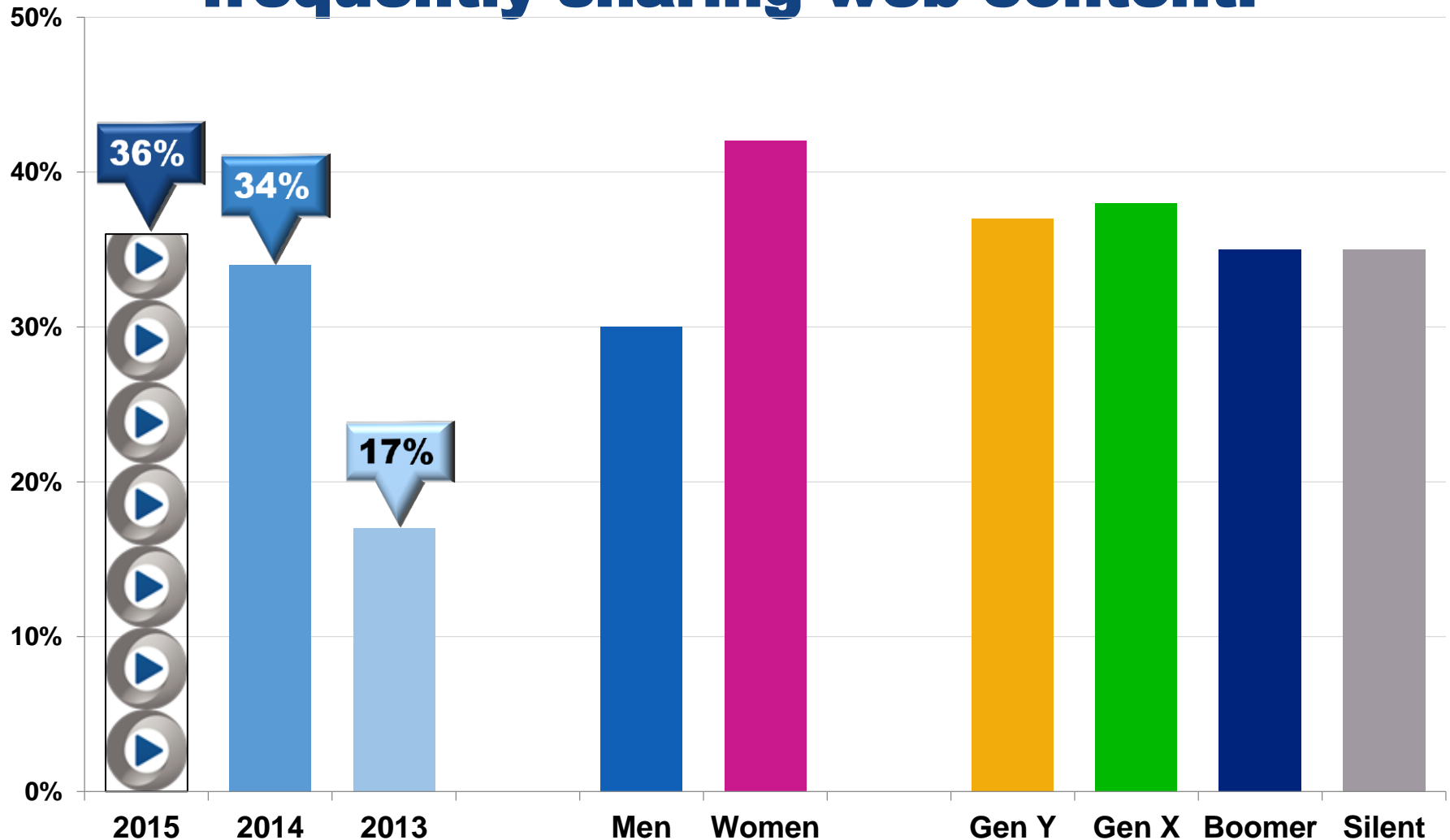


# Different audiences gravitate to specific social platforms. Snapchat rules with Alternative fans.



Among those with a social media profile

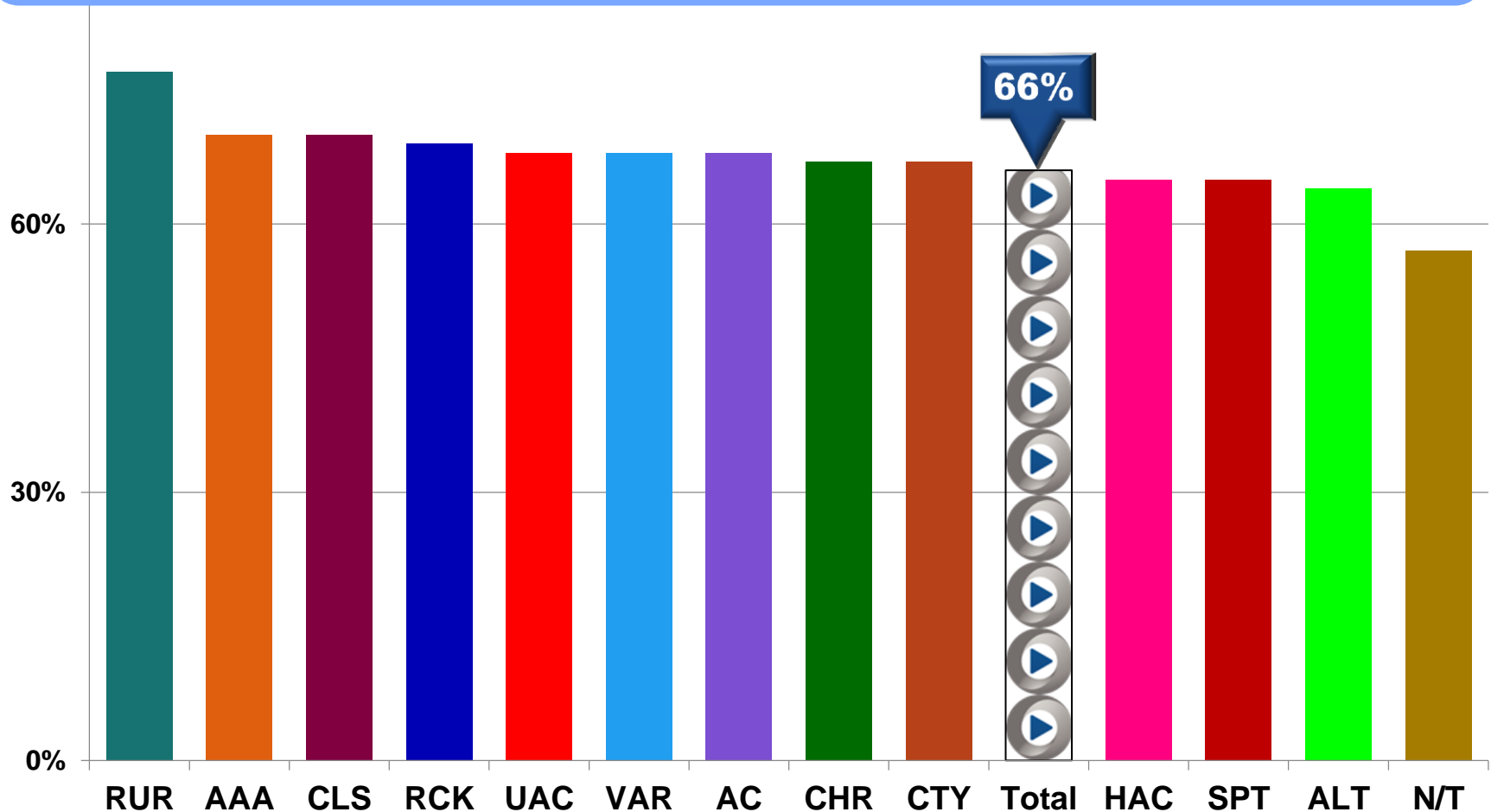
# More radio listeners are frequently sharing web content.



“How often do you share things with friends, family members, and others that you see on any kind of websites, social media sites, or receive in emails?”

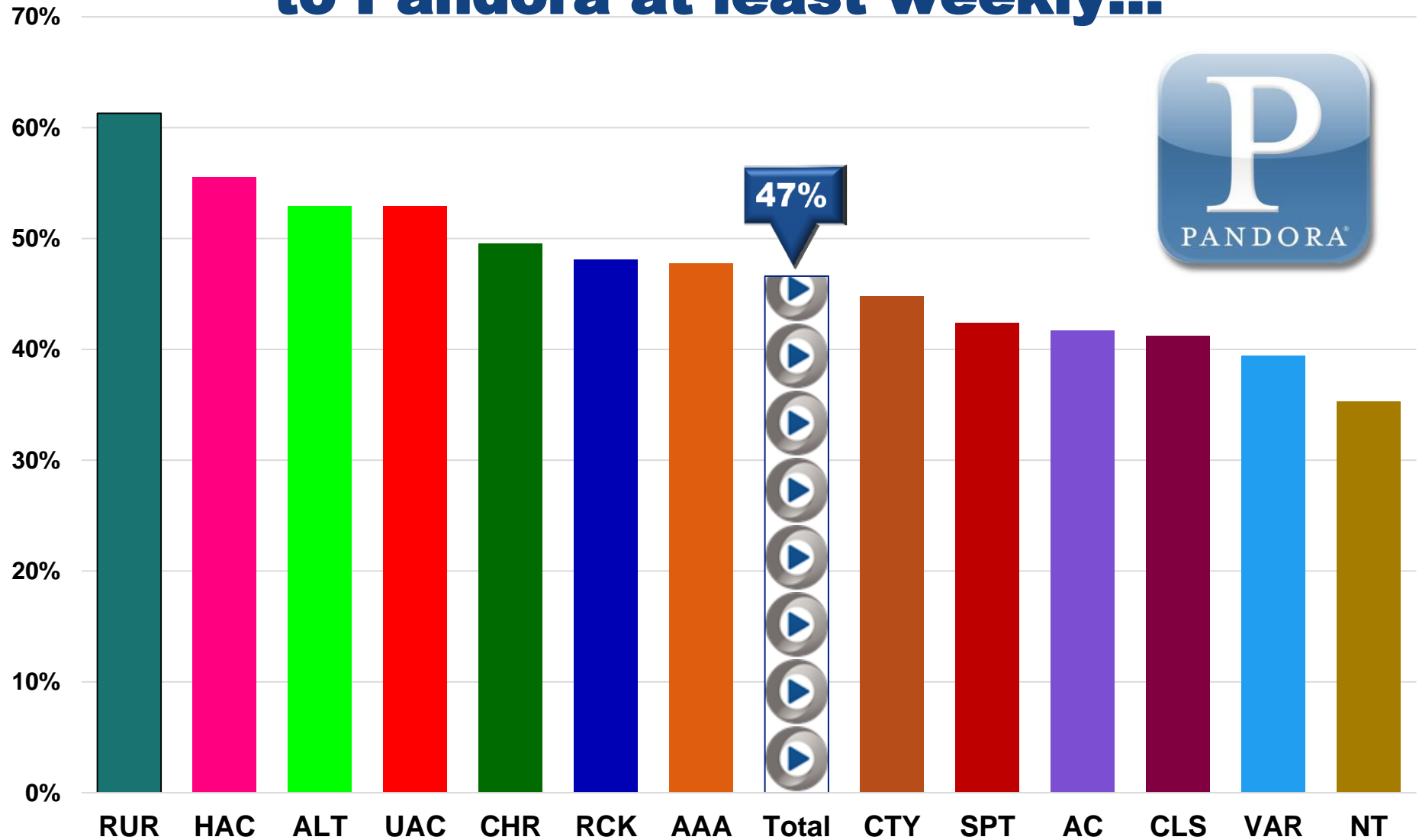
# Two-thirds of those who stream their favorite stations would register.

“Would you be willing to sign up (provide your name, email address, zip code) in order to listen to THE STATION THAT SENT YOU THIS SURVEY'S stream?”



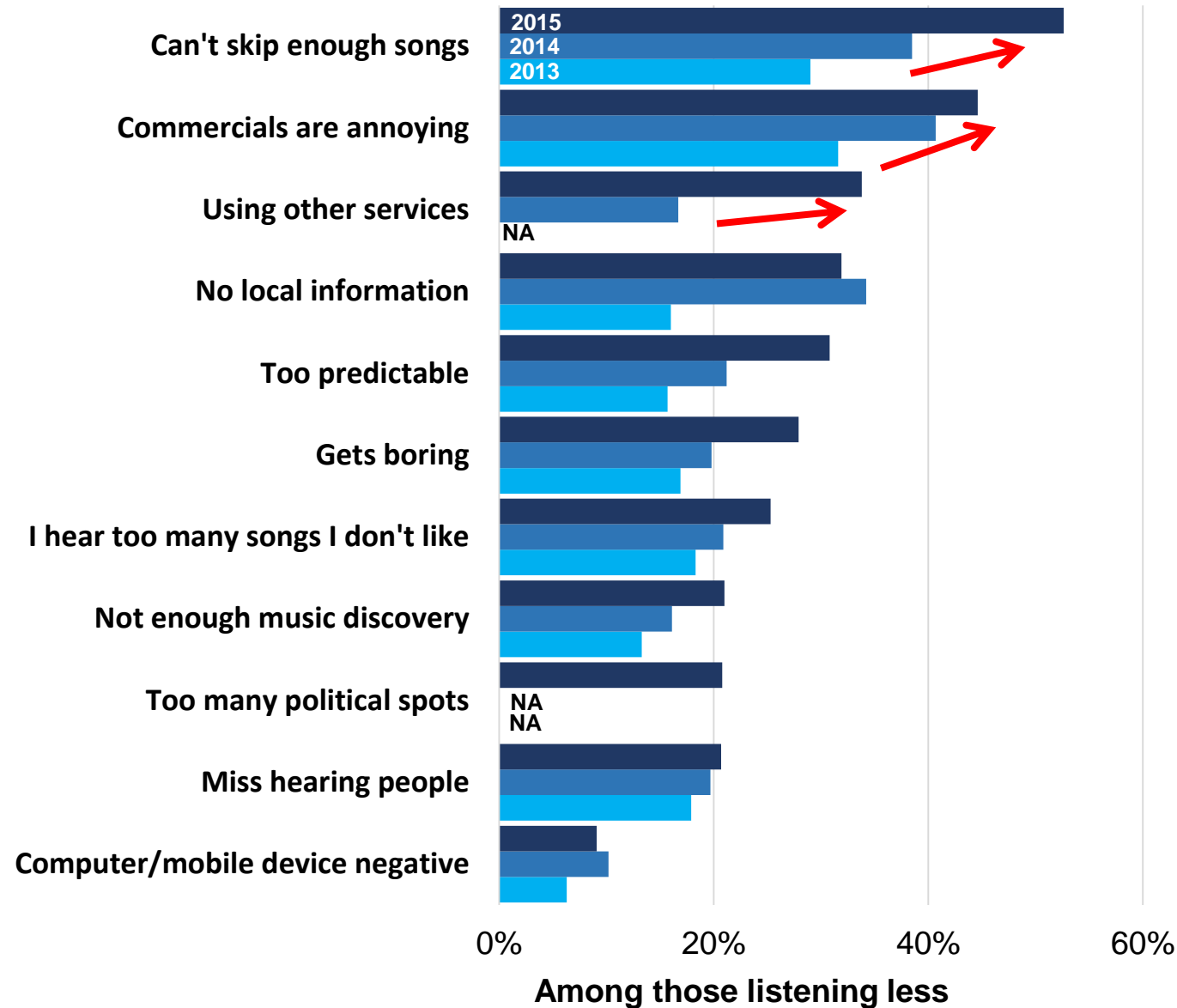
Based on those who listen to the stream of the station that sent them the survey

# Nearly half of “streamies” listen to Pandora at least weekly...



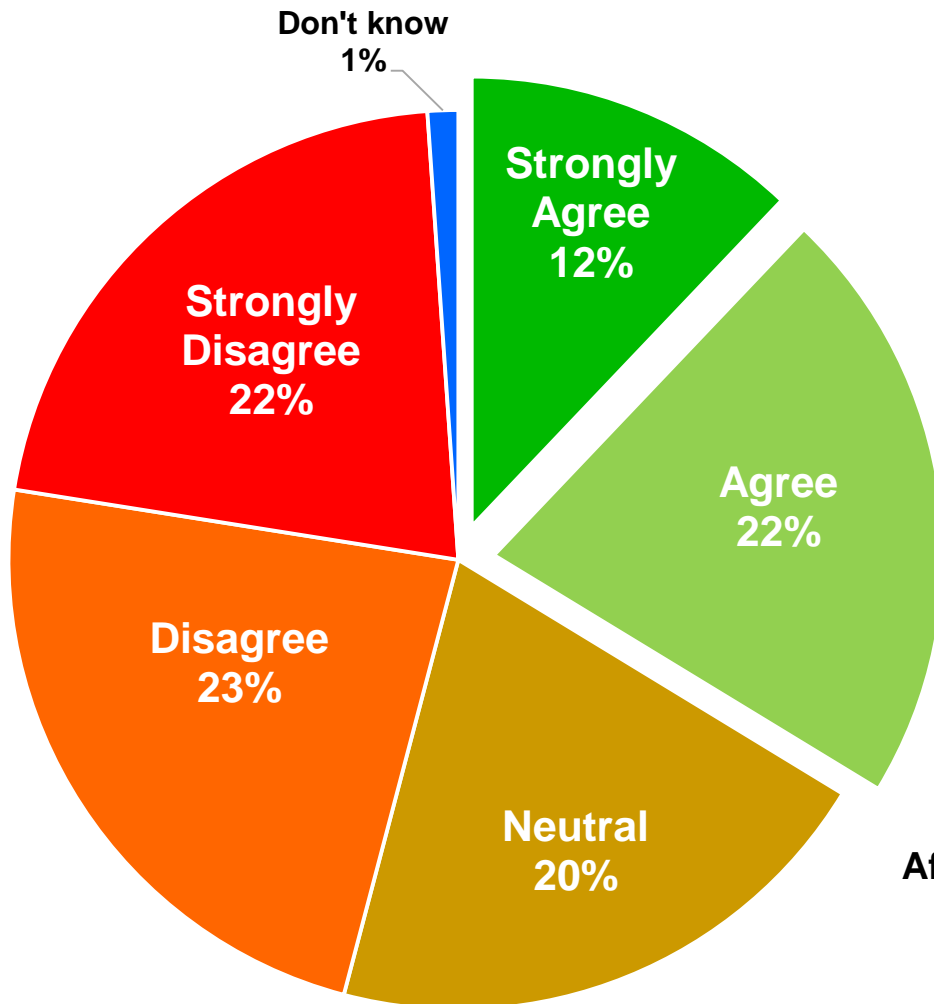
Among those who stream, excluding Canada

# ...and the top Pandora complaints are a lack of song skips & annoying commercials.



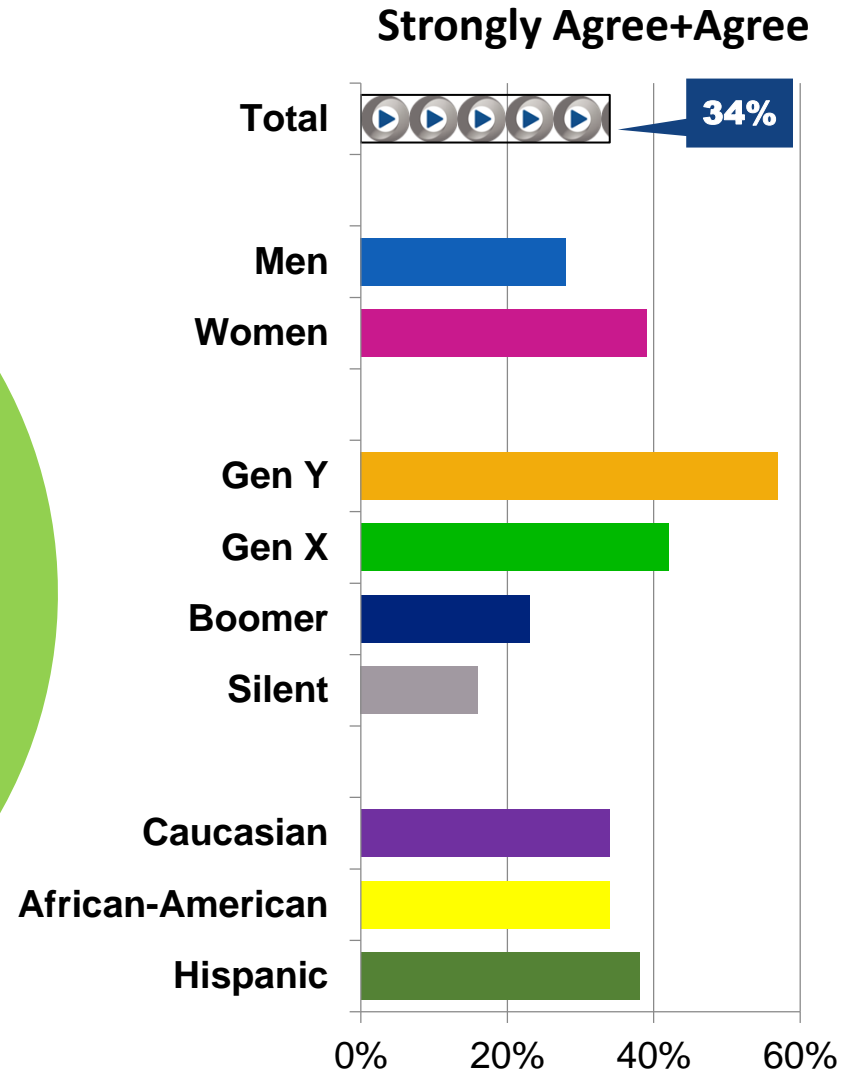


# More than one-third admit being addicted to their mobile phones.

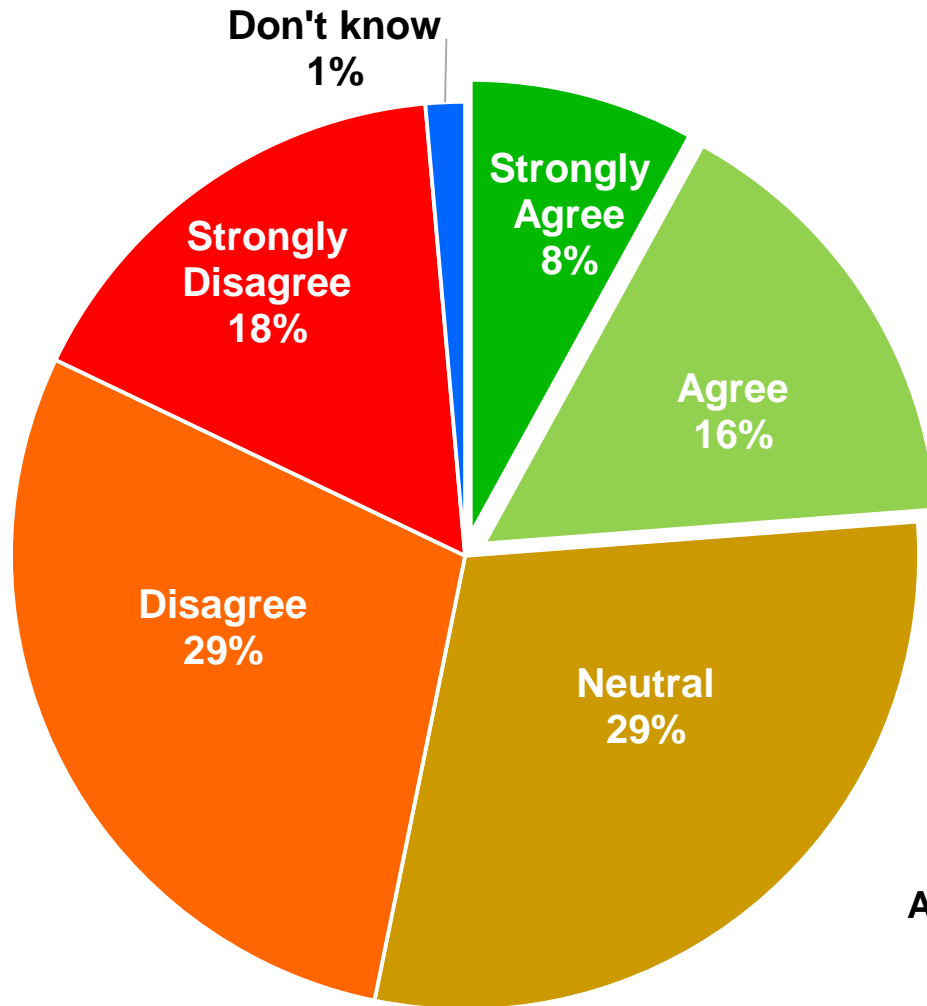


**"I am addicted to my mobile phone."**

Among cell phone owners

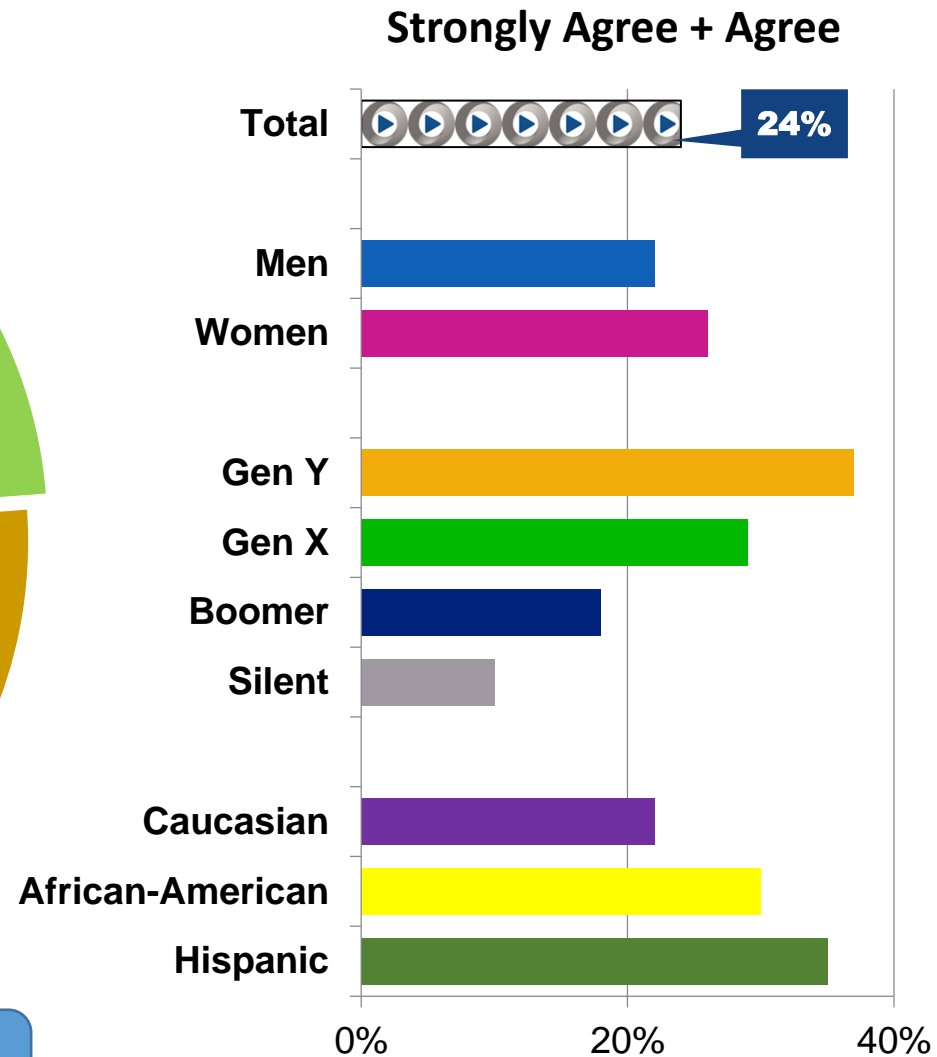


# And one-fourth say they'd rather use a mobile device than a computer .

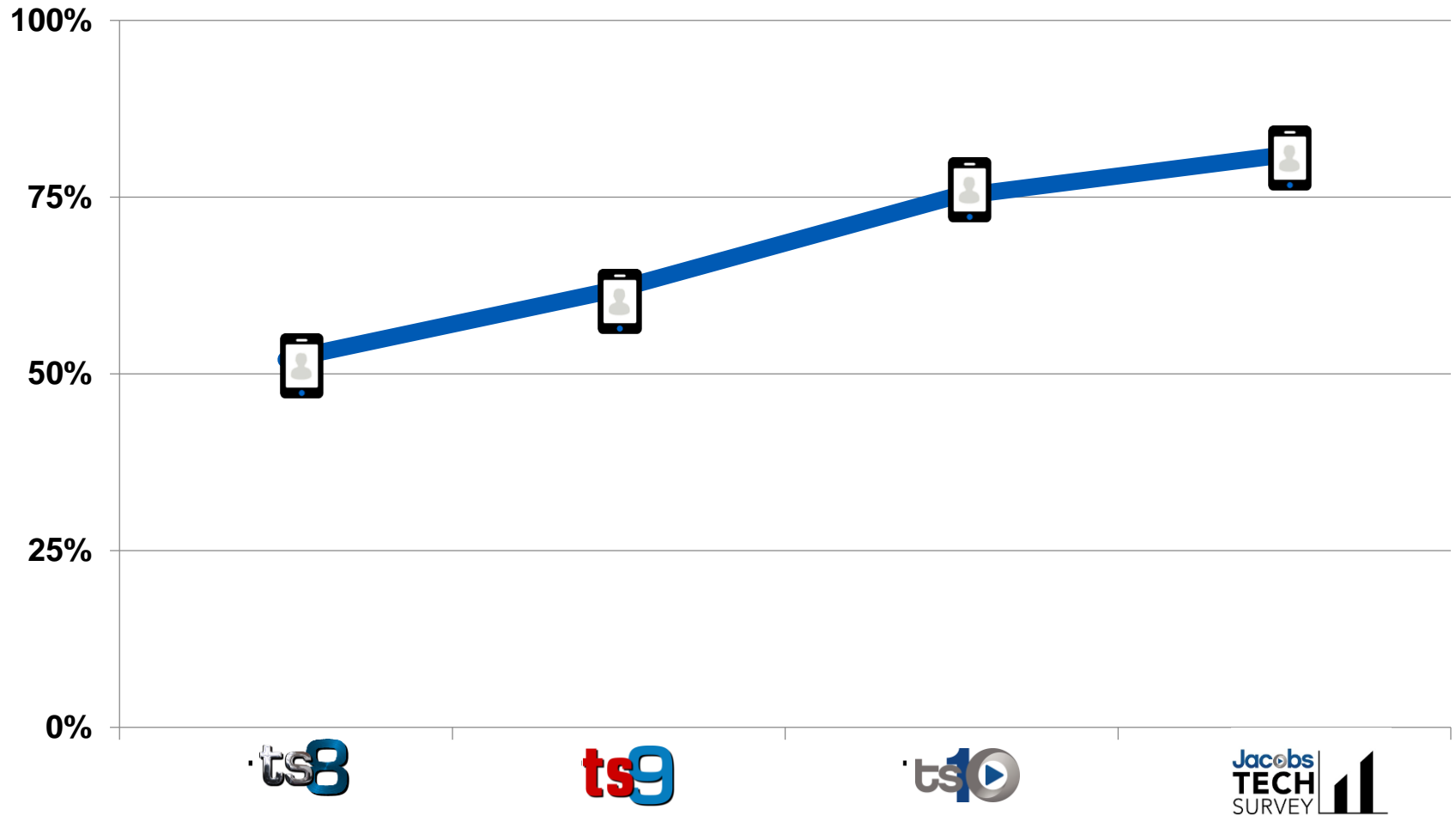


**"I prefer using a mobile device to using a computer."**

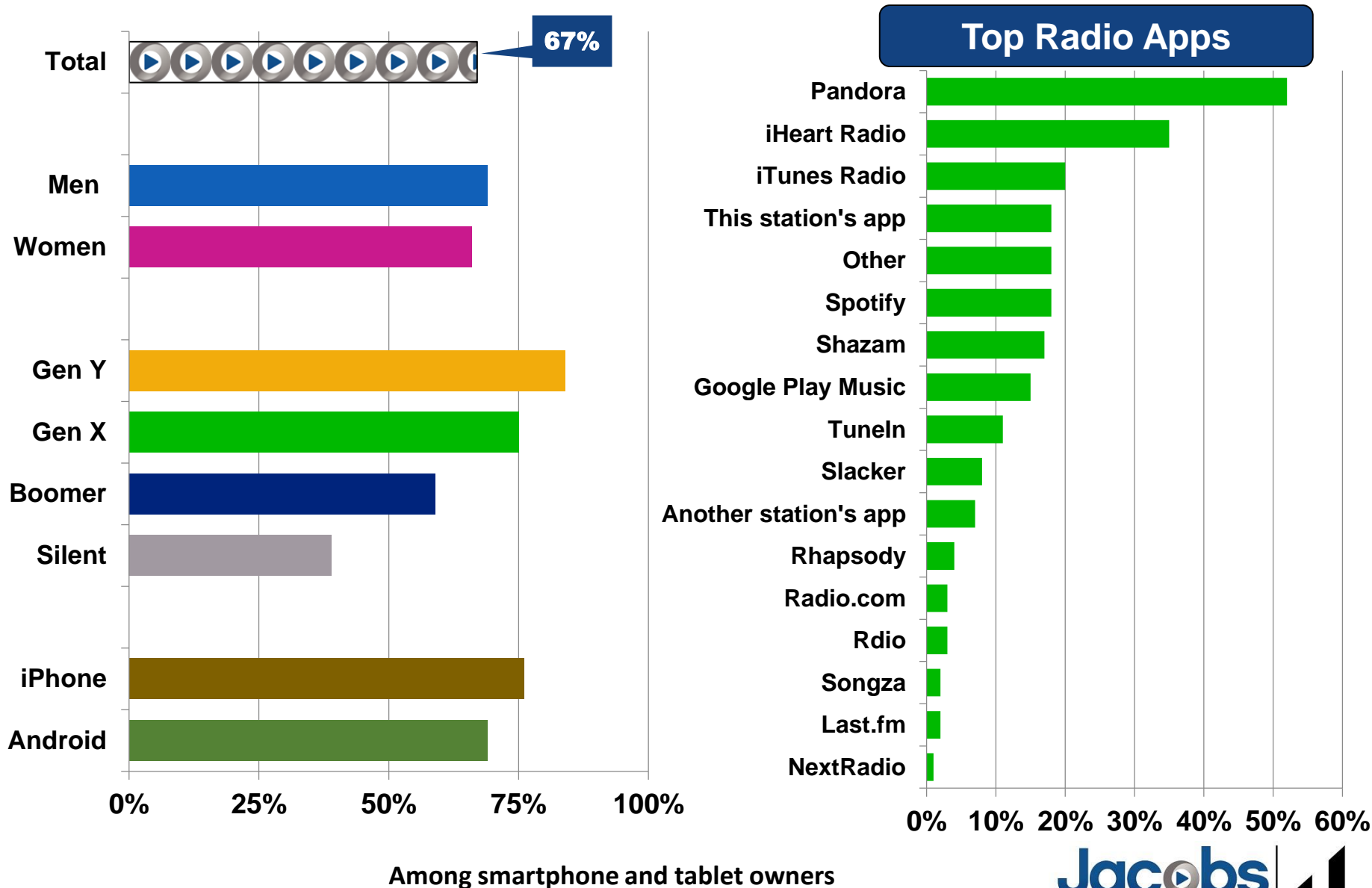
Among cell phone owners



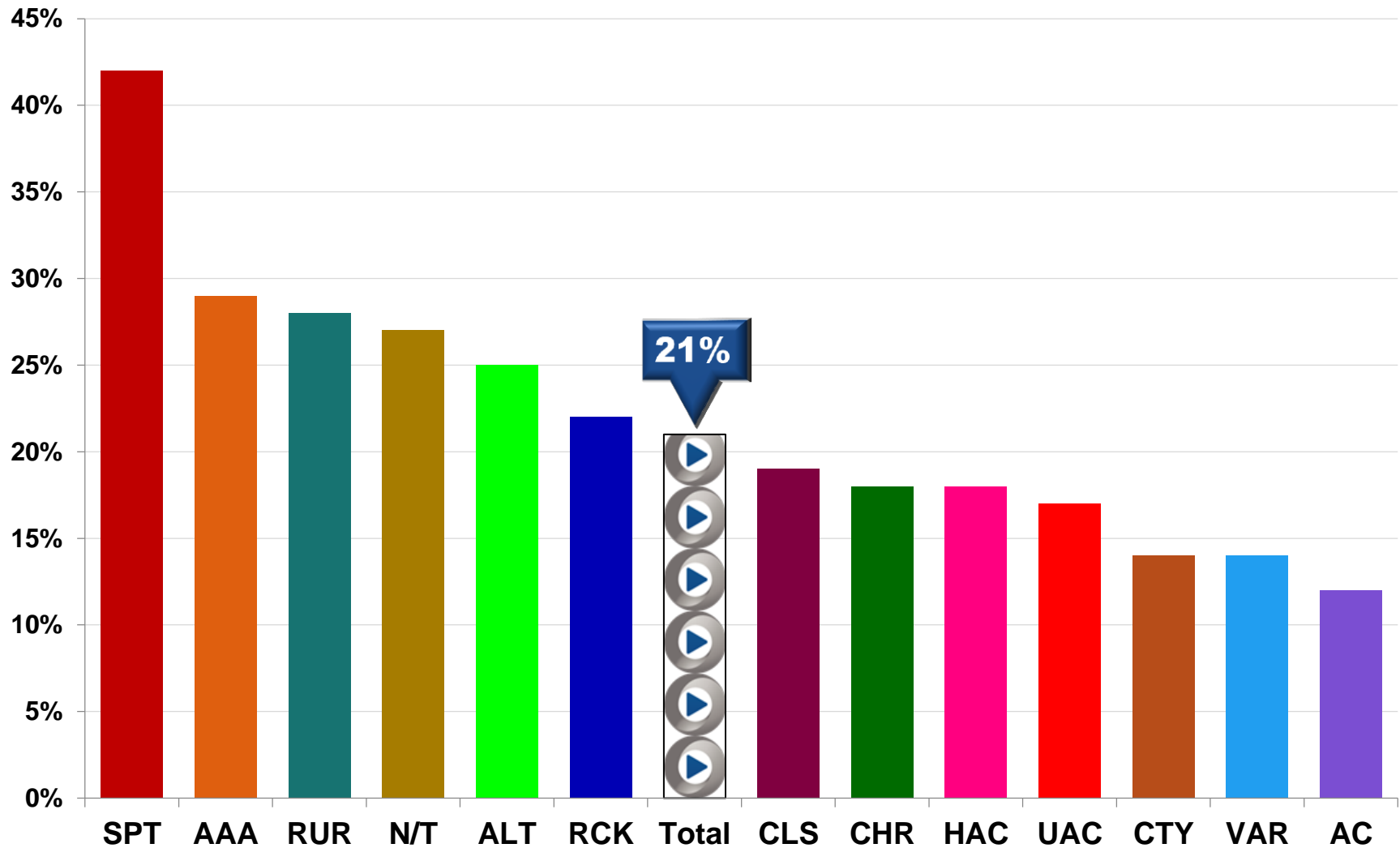
# Smartphone Ownership – Trend Line



# Two-thirds of mobile device owners download radio-centric apps & Pandora leads the pack

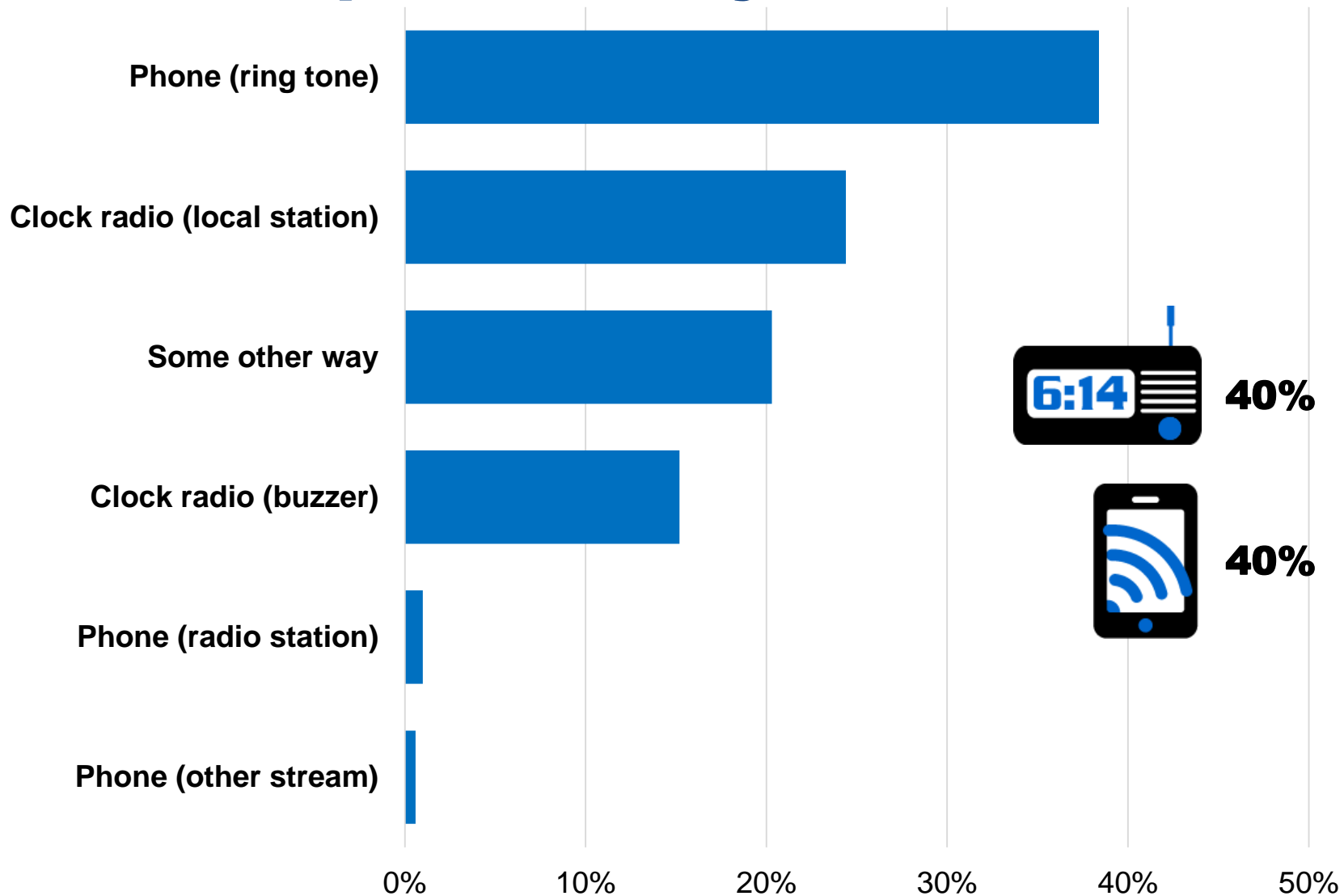


# One-fifth have accessed a podcast or on-demand audio in the past month.



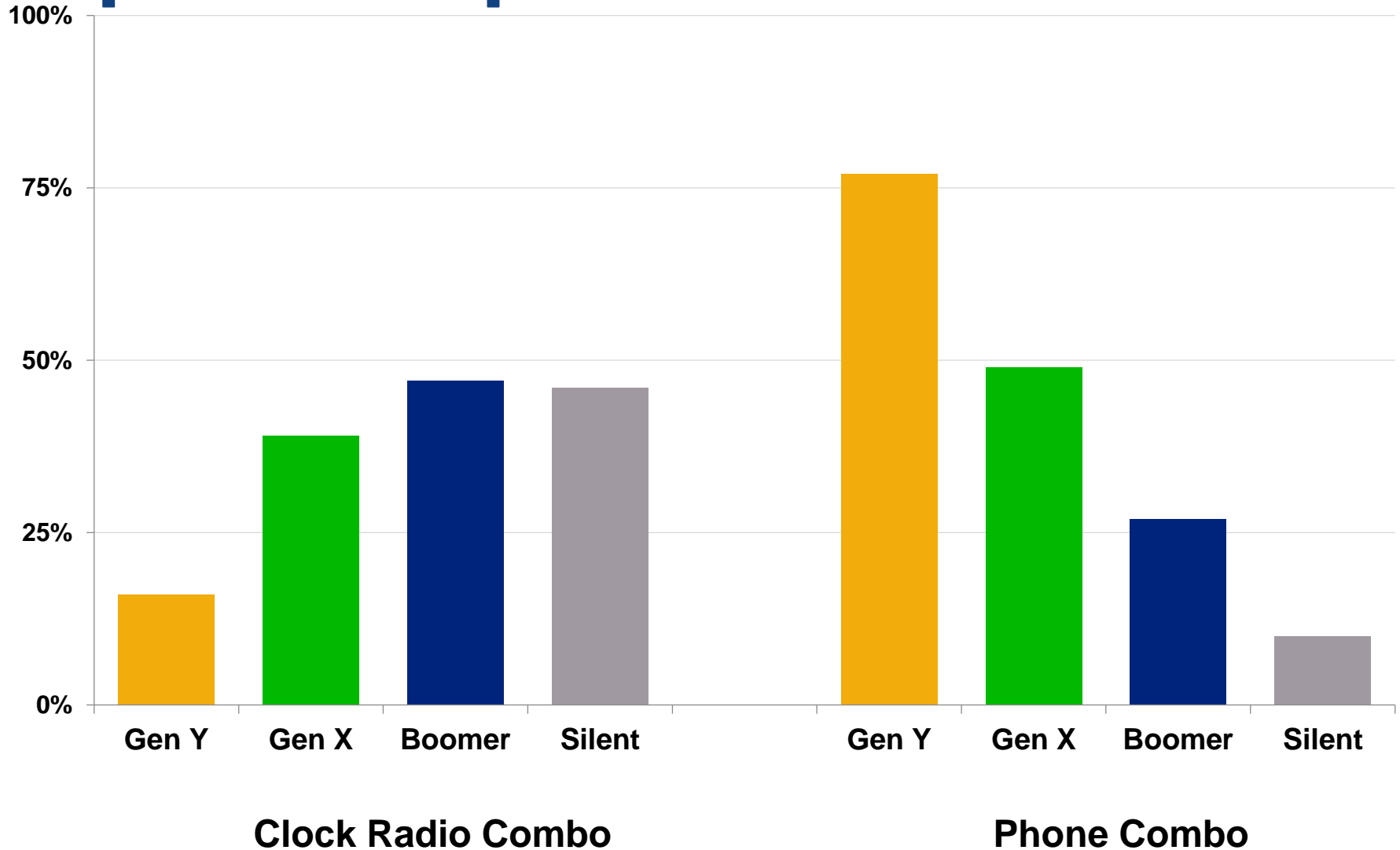


# Just as many consumers wake up to a mobile phone as they do a clock radio.



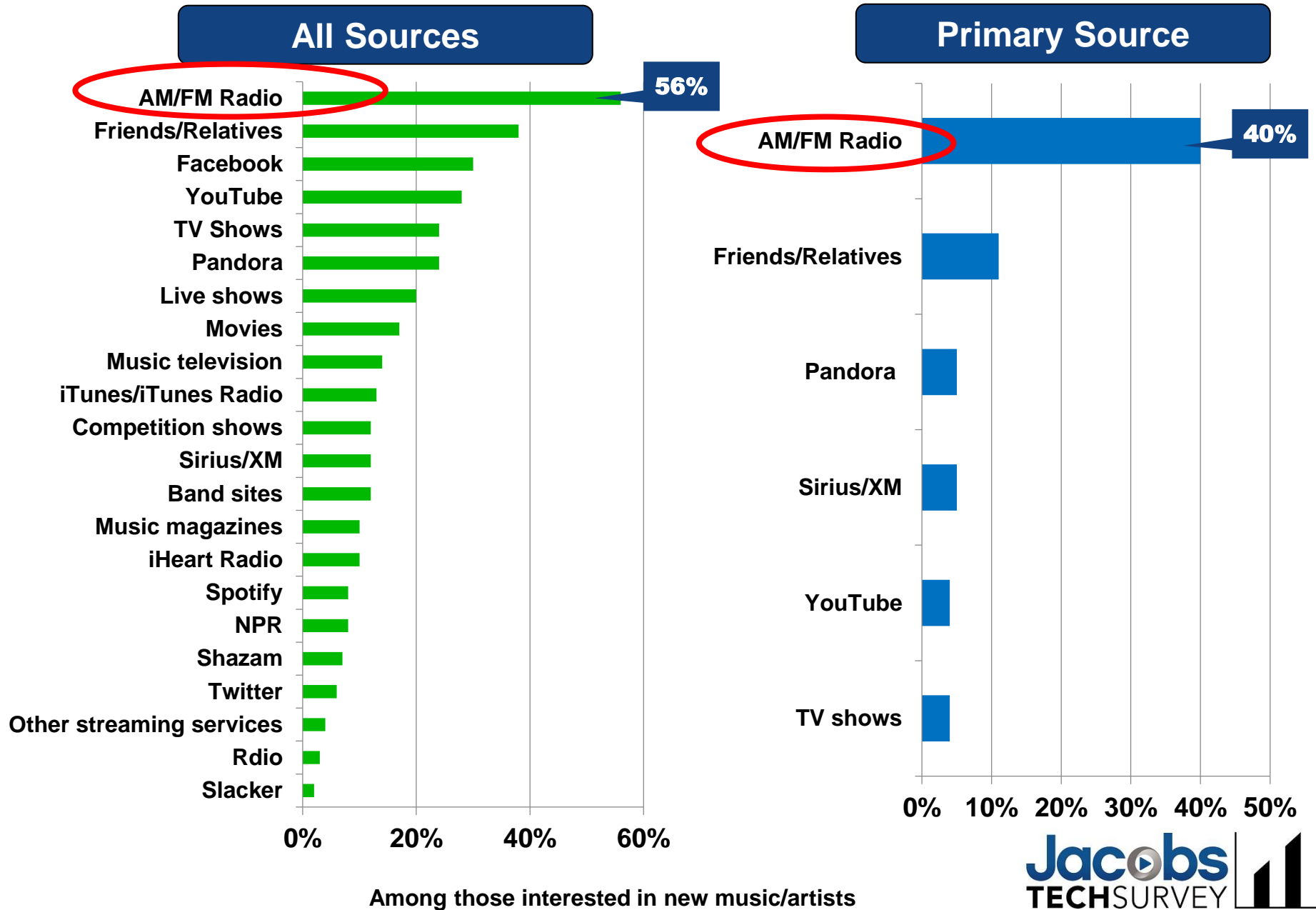
Among cell phone owners

# But generationally, waking up to a mobile phone is the preferred Millennial device.

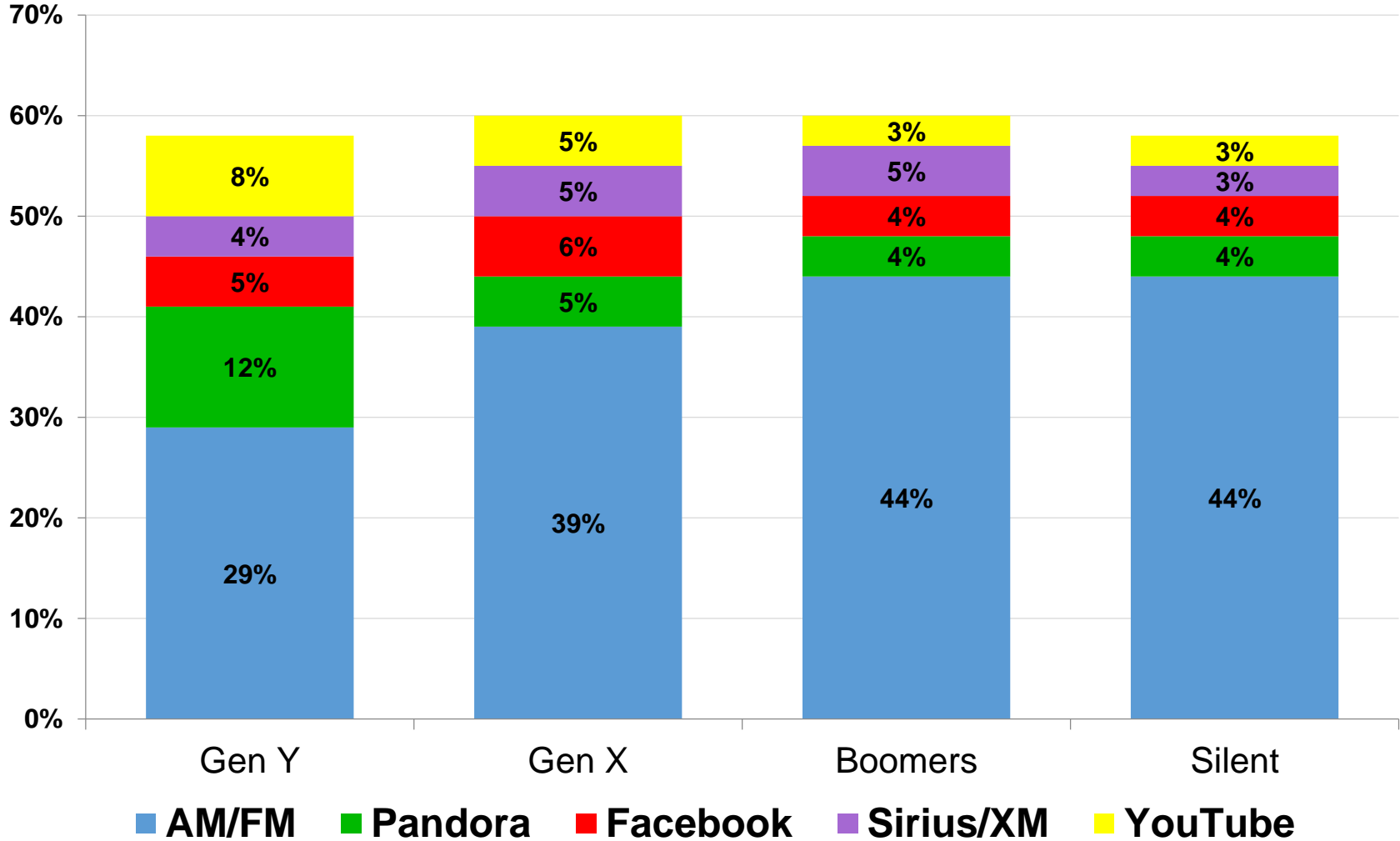


Among cellphone owners

# Radio continues to lead in new music discovery.

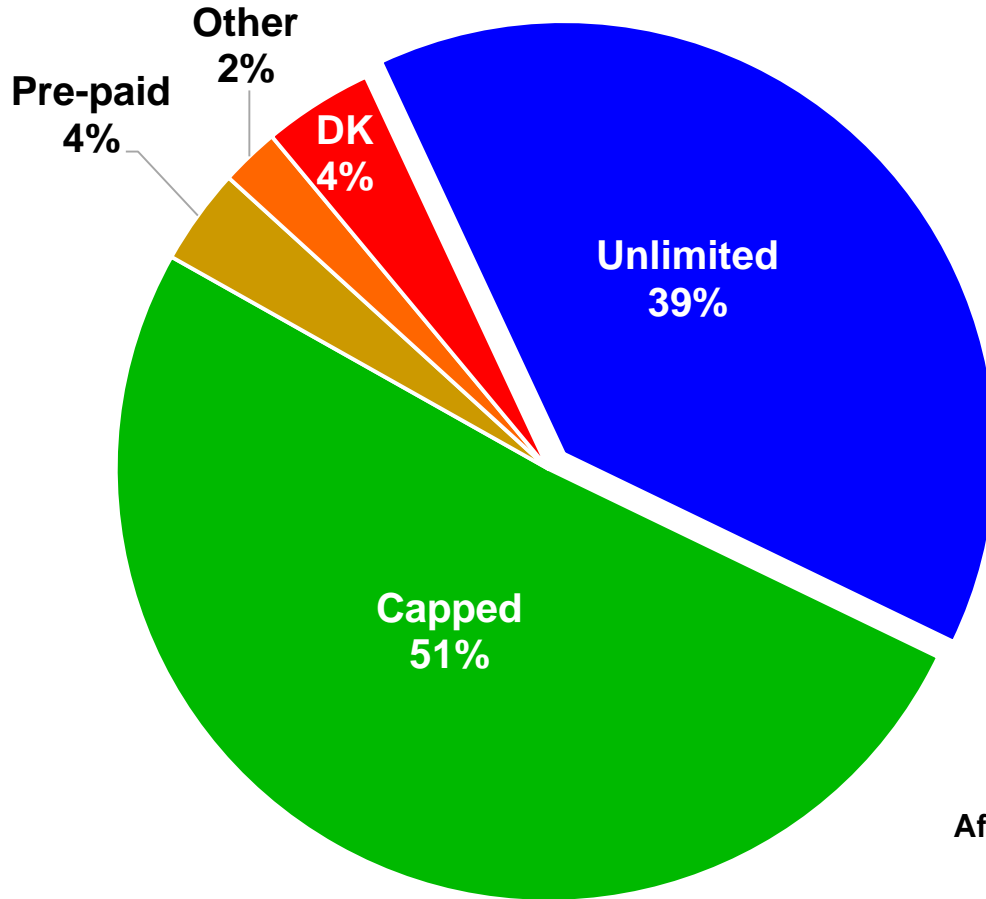


# But Millennials are increasingly turning to other sources for new music/artist discovery.

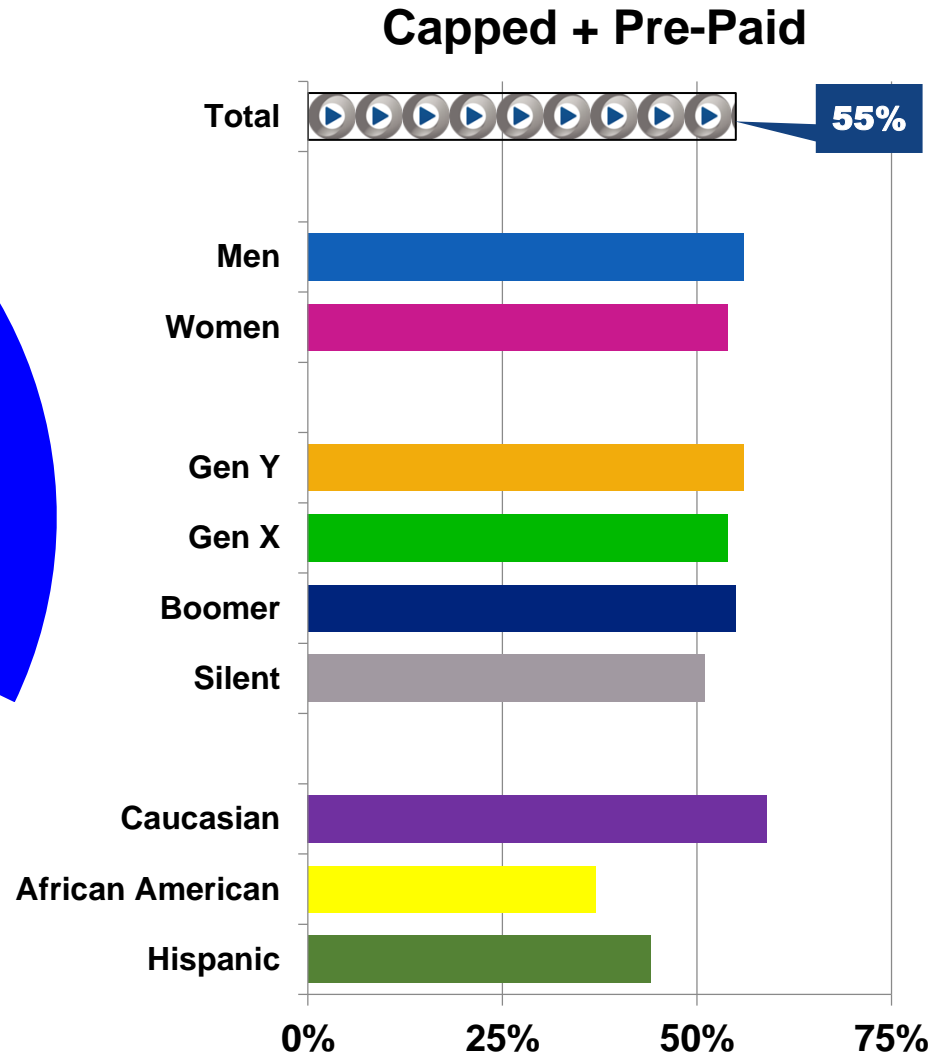


One choice only among those interested in new music

# More than half of smartphone owners have limited data plan.

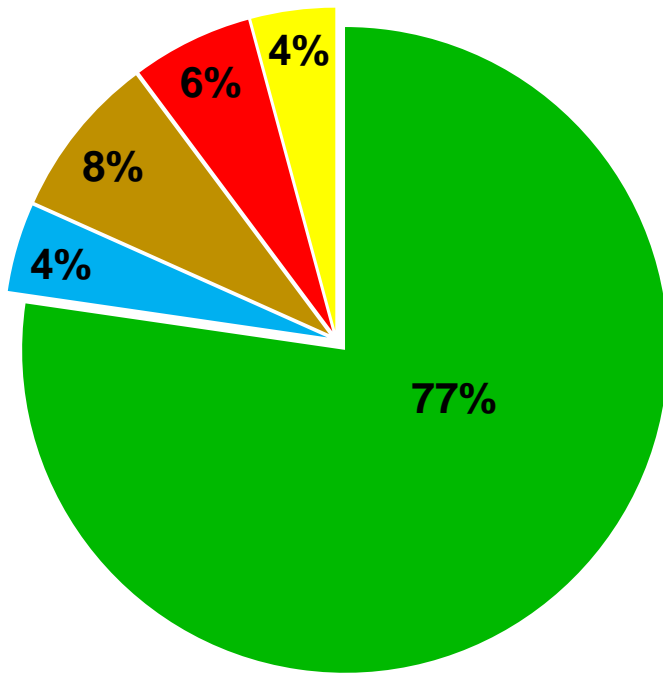


Among smartphone owners

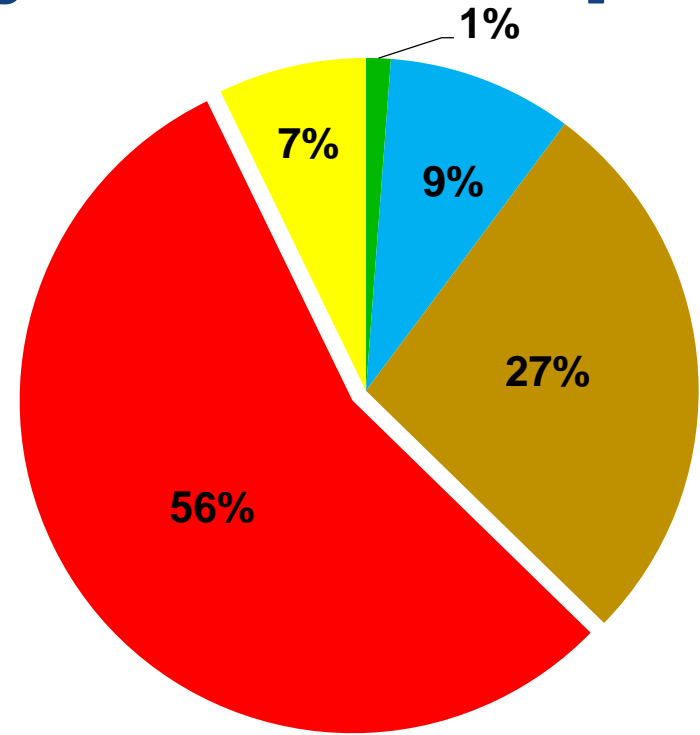




# More than half of those with a limited data plan use less data when they're near the cap.



**Unlimited Plan**

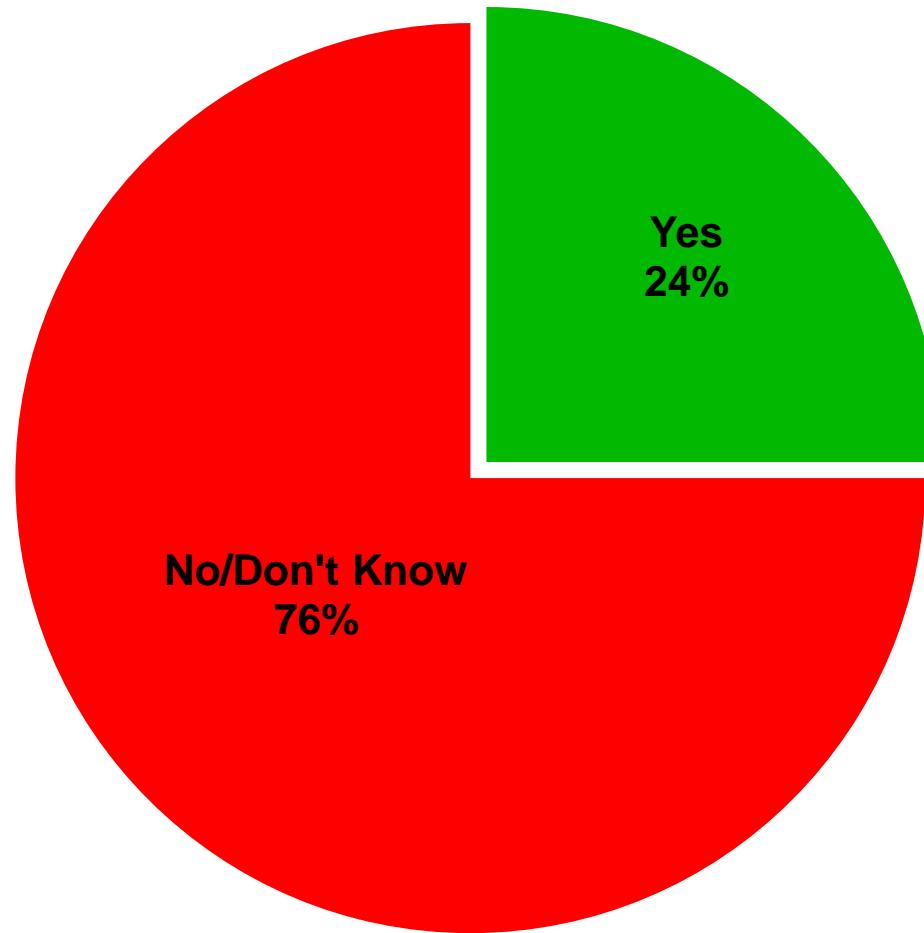


**Capped/Prepaid Plan**

- I do what I want to on my smartphone because I have an unlimited plan
- I do what I want to on my smartphone even if it means I have to pay extra fees
- I am careful about how much data I use but I still go over the cap sometimes
- If I am at or near the cap I will be sure to use less data
- Other

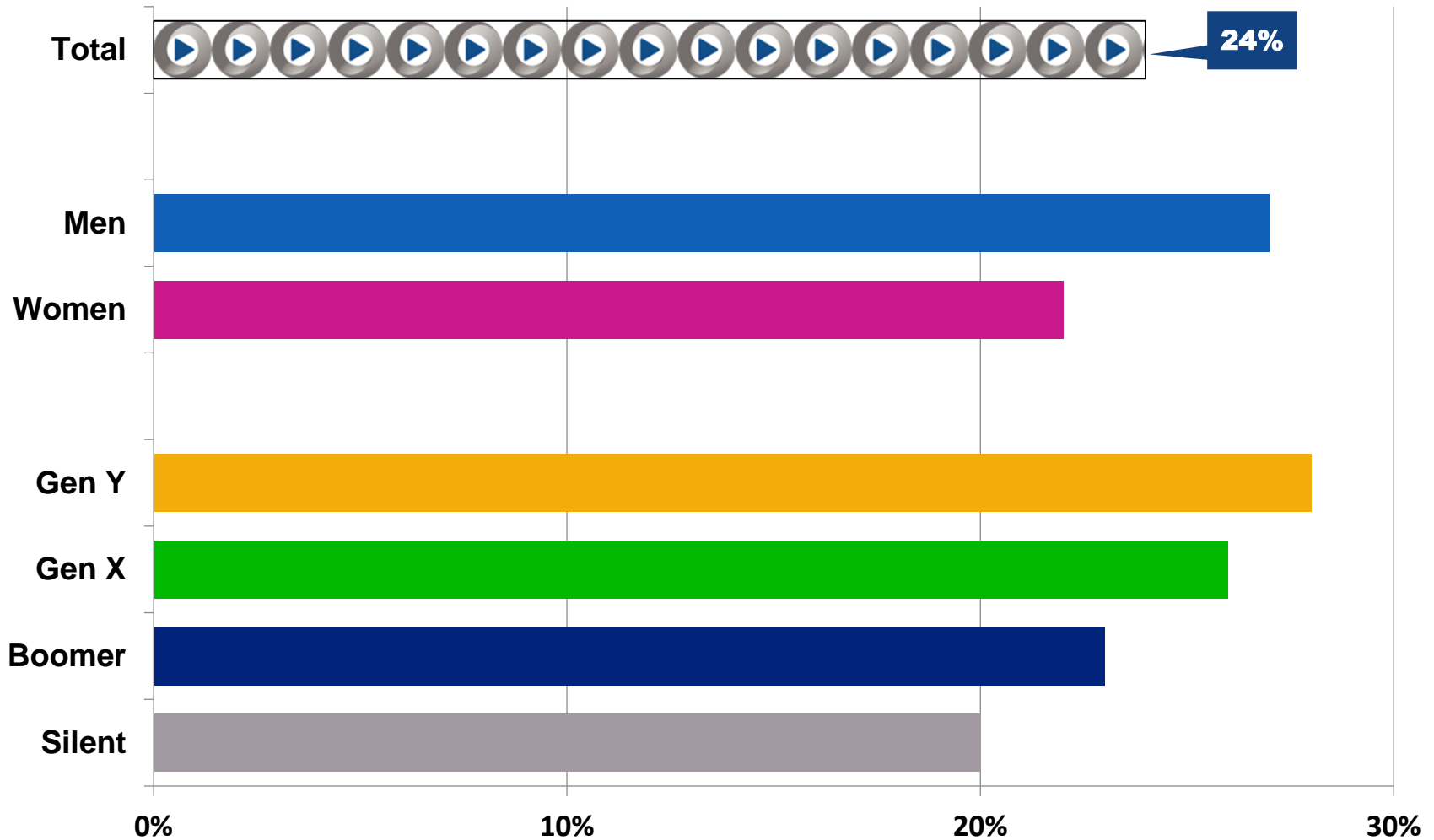
Among smartphone owners

# One-fourth are aware of the FM Radio chip.



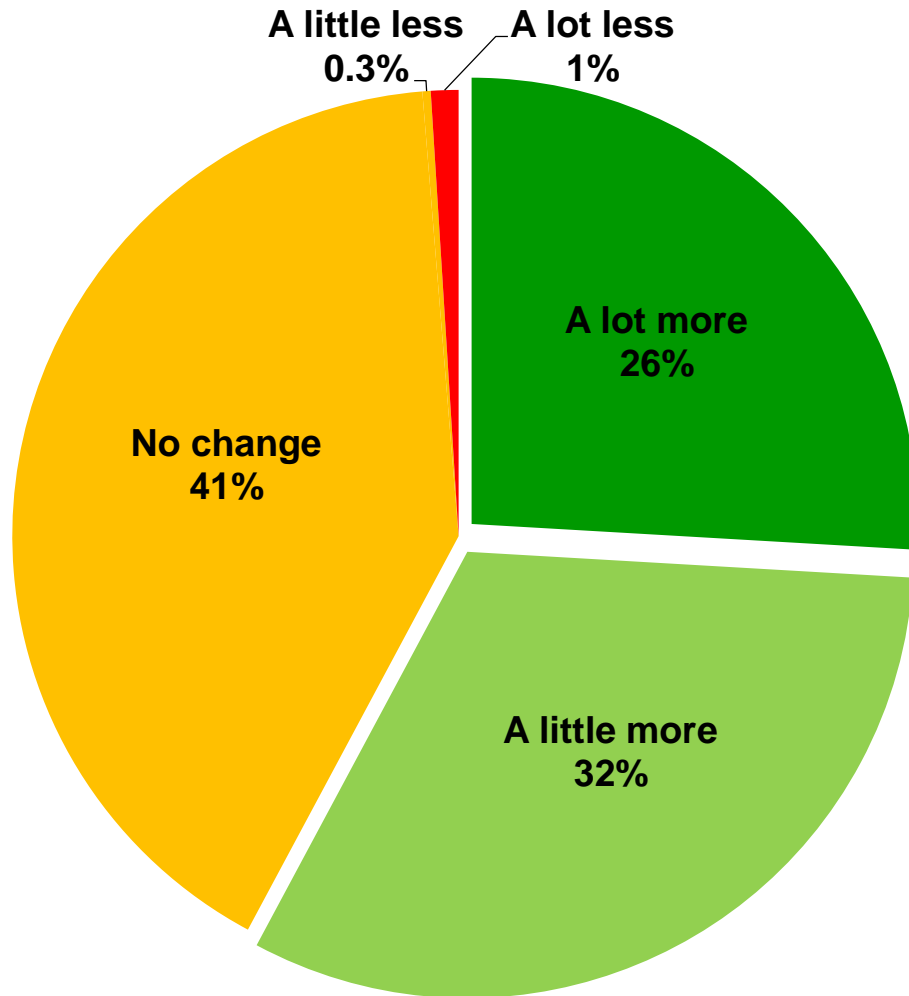
“Are you aware that an FM radio chip is built into smartphones, which if activated, would allow you to listen to local FM radio free of charge?”

# Awareness Of FM Radio Chip

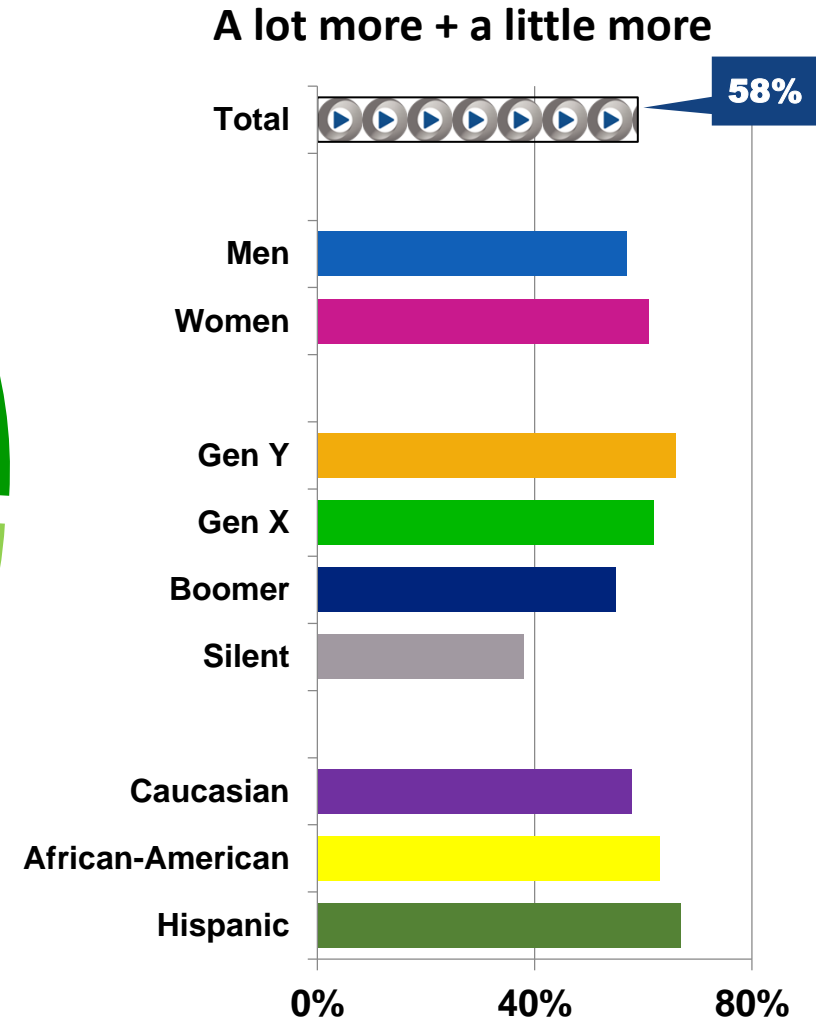


“Are you aware that an FM radio chip is built into smartphones, which if activated, would allow you to listen to local FM radio free of charge?”

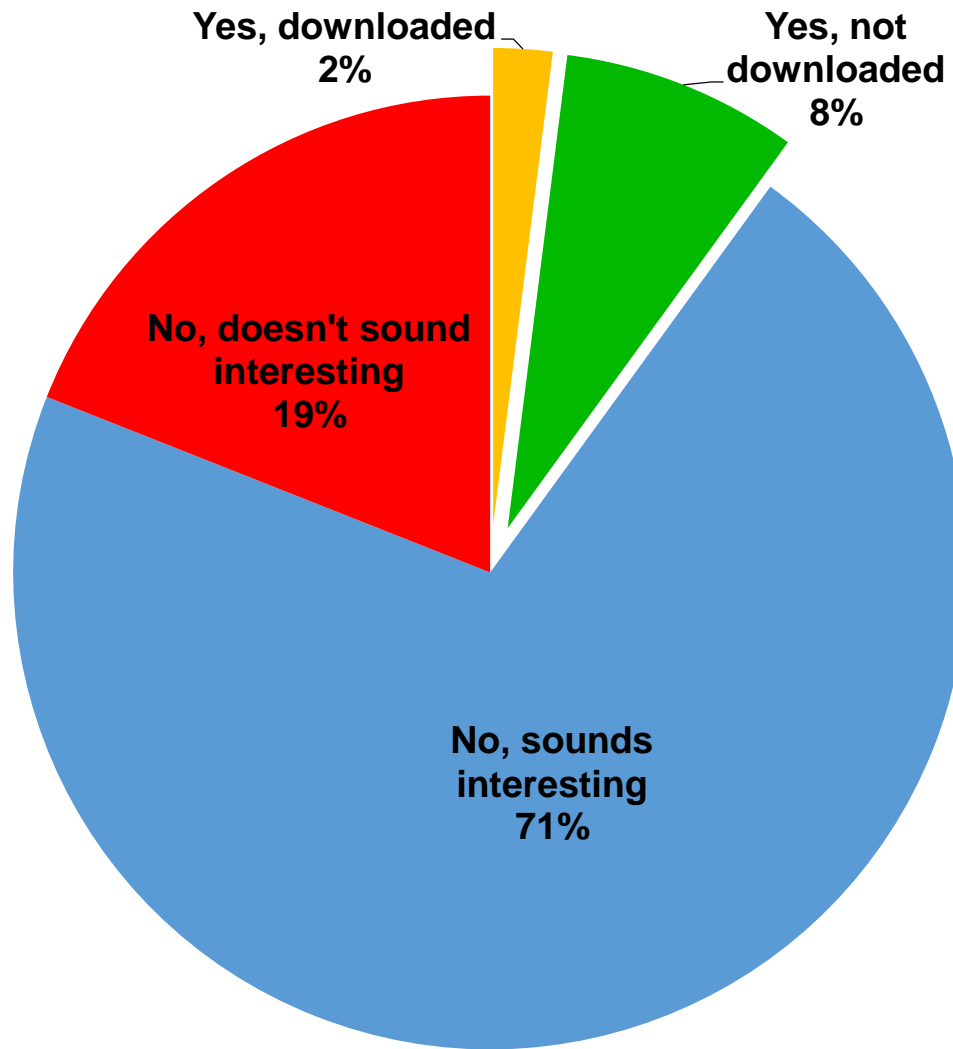
# Nearly six in ten say an FM radio smartphone chip would lead to a little/lot more listening.



Among smartphone owners

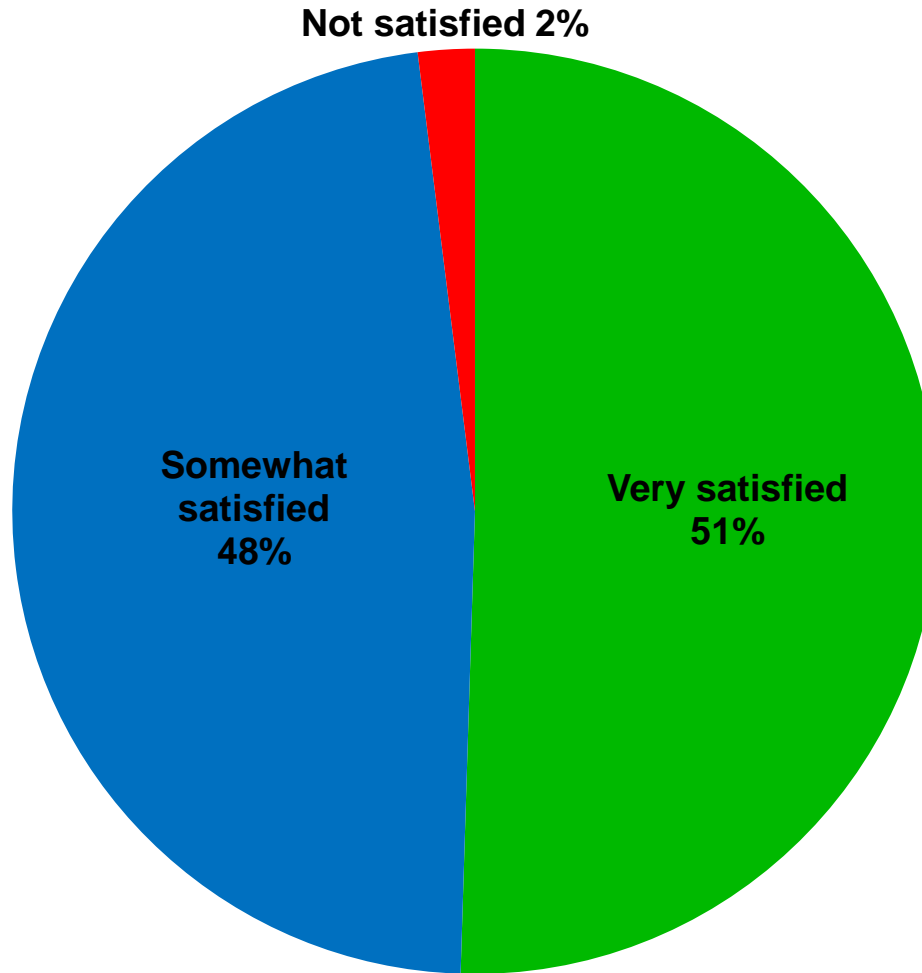


# One in ten smartphone owners is aware of the NextRadio app.



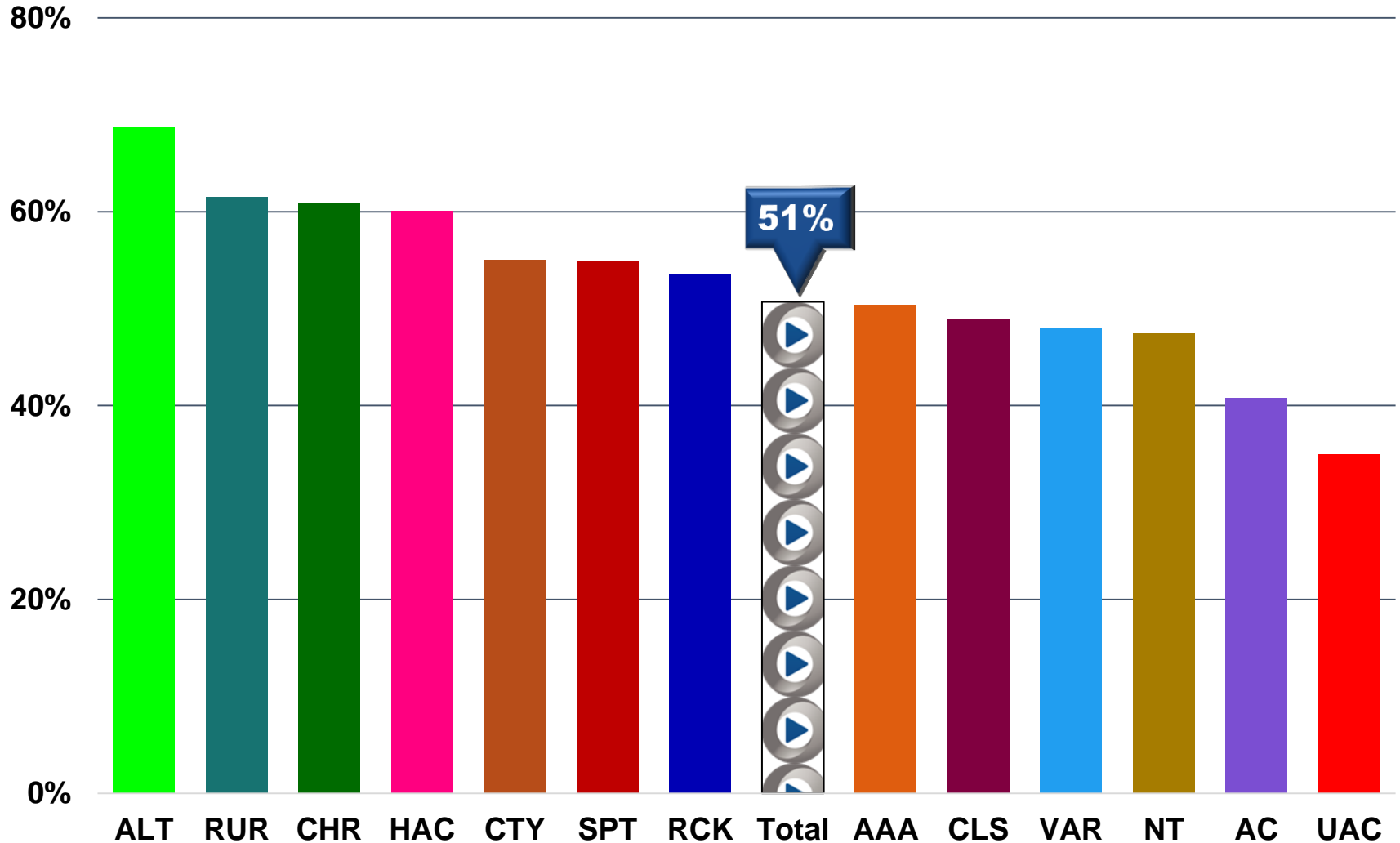
Among those who own a tablet or a smartphone

# Those who use the NextRadio app frequently or occasionally are satisfied.



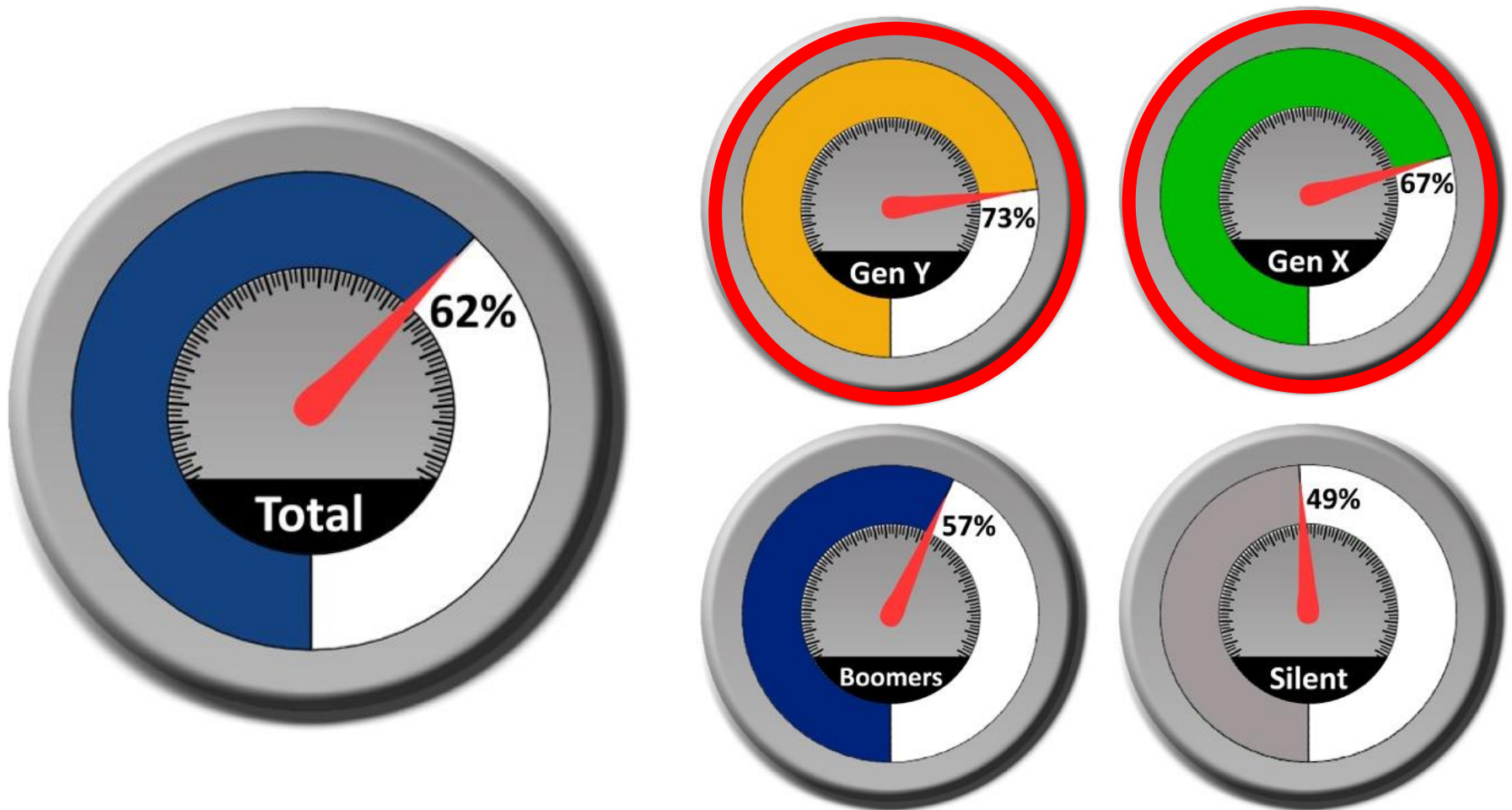
Among those who have downloaded the app  
and use it frequently or occasionally

# Half say all or most of their radio listening takes place while they're in a car.



"100% of the time" or "Most of the time"

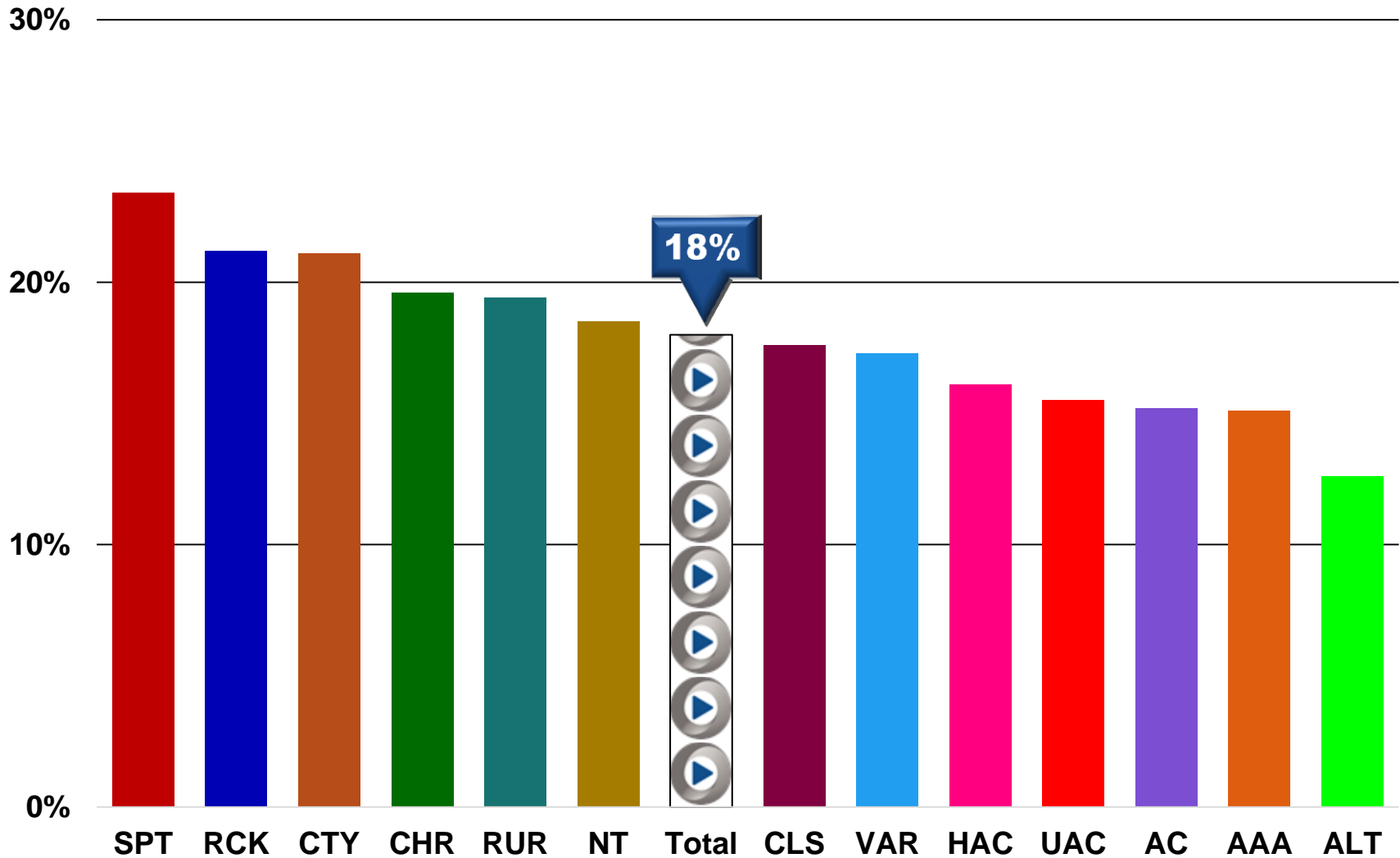
# More than six in ten are able to connect a smartphone or mp3 player in their cars.



In the vehicle driven or ridden in most often

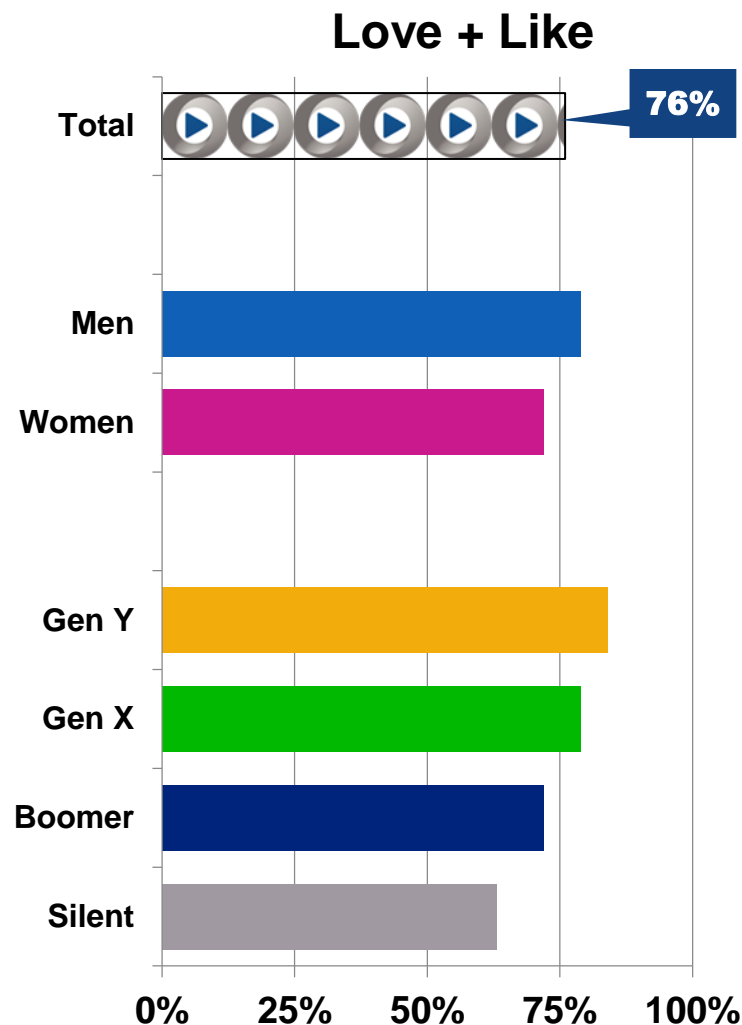
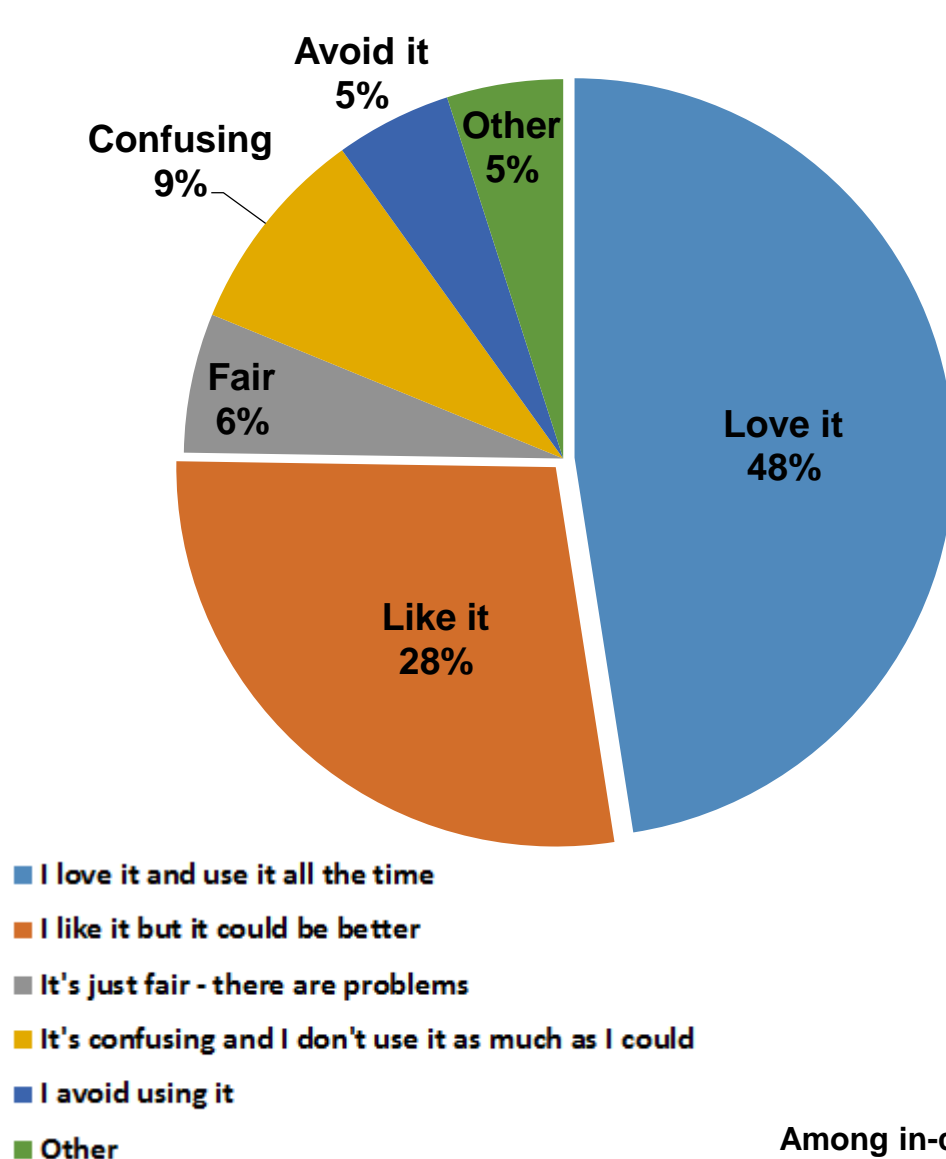


# Nearly one-fifth have a connected car...



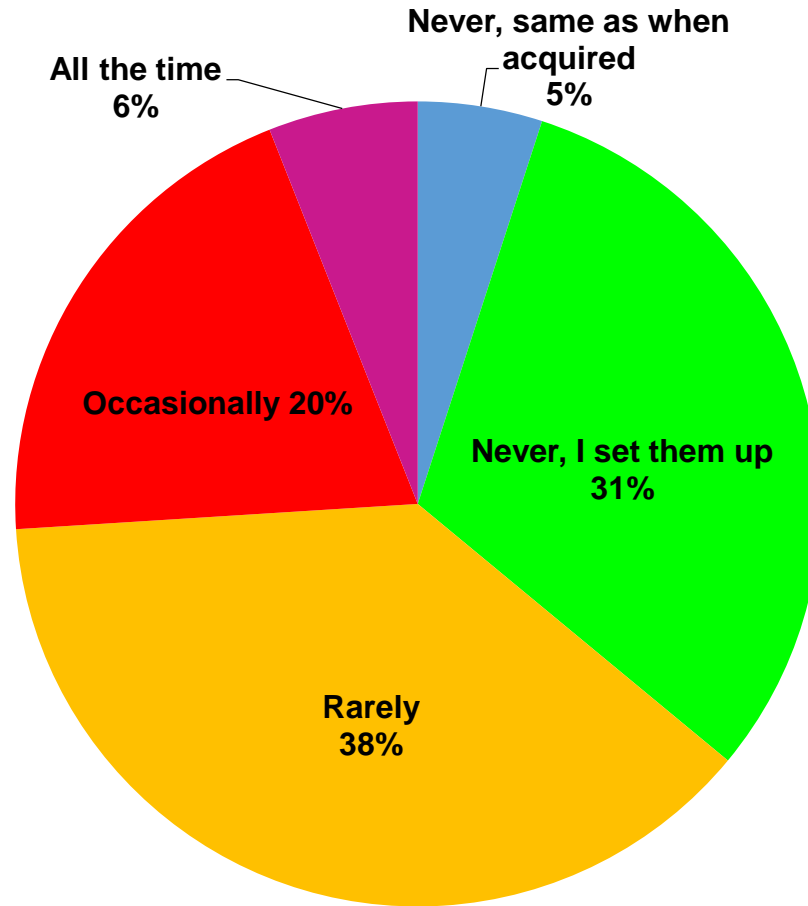
In the vehicle driven or ridden in most often

# ...and three-fourths love or like their in-car media and entertainment systems.



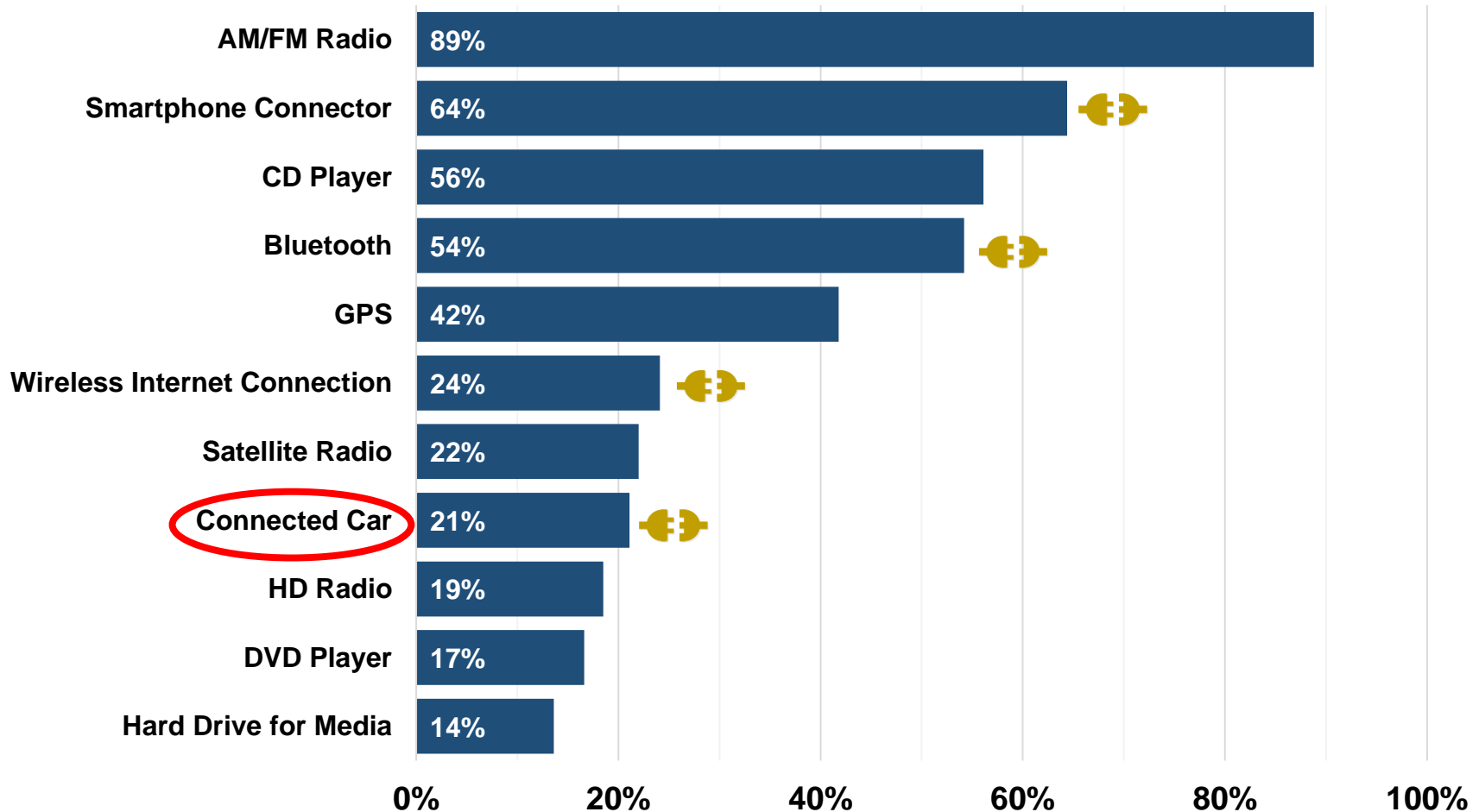
Among in-car media system owners

# Three-fourths rarely or never change their car pushbuttons or settings.



- I have never changed them – they're the same as when I acquired the vehicle
- I set them up when I first got the vehicle and I never changed them
- I rarely change them
- I change them occasionally
- I change them all the time

# Nine of ten prospective new car buyers says it's very important to have an AM/FM radio.



Among those planning on buying/leasing a new vehicle in 2015



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