

Jacobs
TECH
SURVEY



The Changing Media Landscape

Methodology

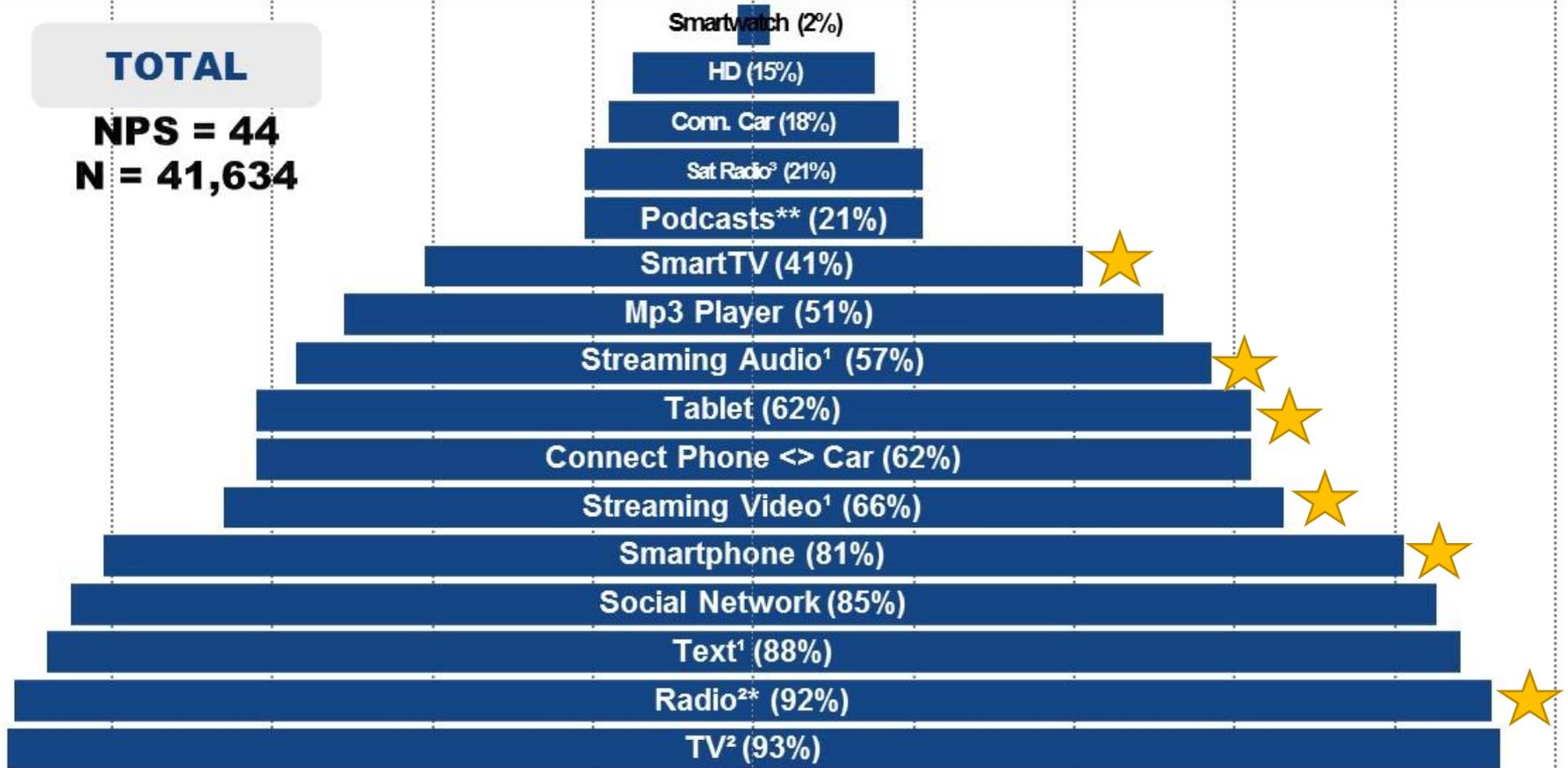
- 220 radio stations in the U.S. & Canada
- N = **41,634**
- Interview dates: January 19 – February 9, 2015
- Most respondents are members of station email databases. Some responses were gathered via station websites and/or social networking pages.
- All responses were collected online and weighted using 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

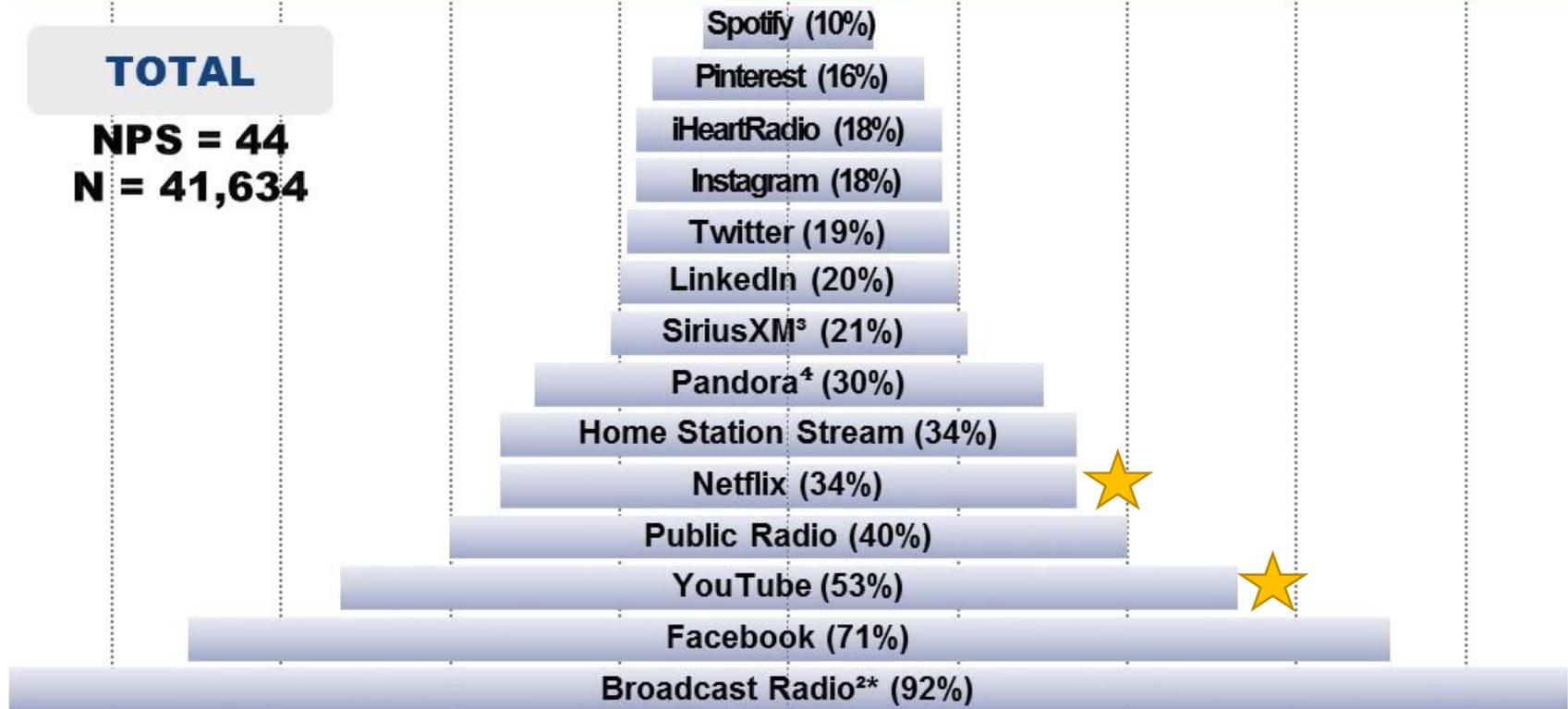


Weekly or more¹ 1+ hour per day² Paid & trial users³ Monthly^{**} Any Platform/Device^{*}

Brand Platform Pyramid 2015

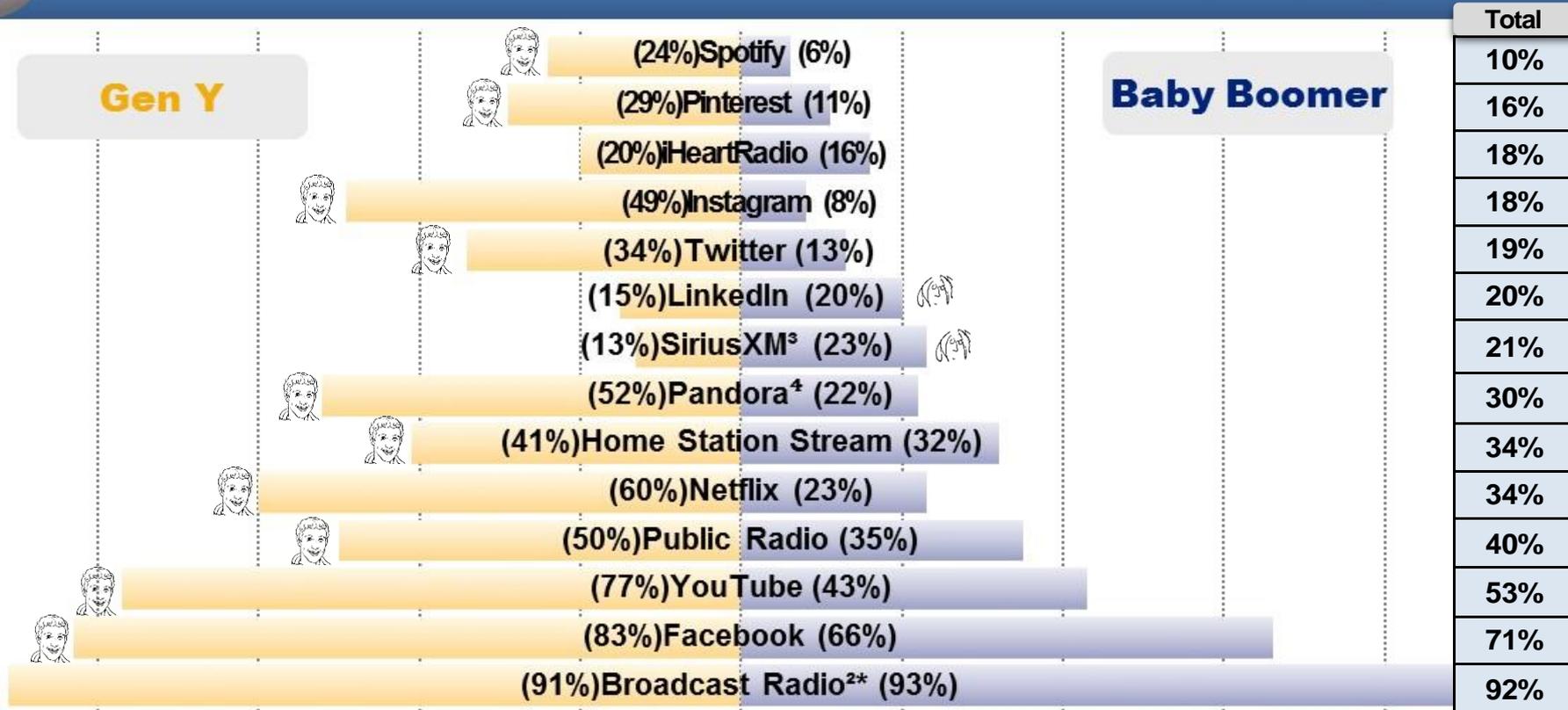
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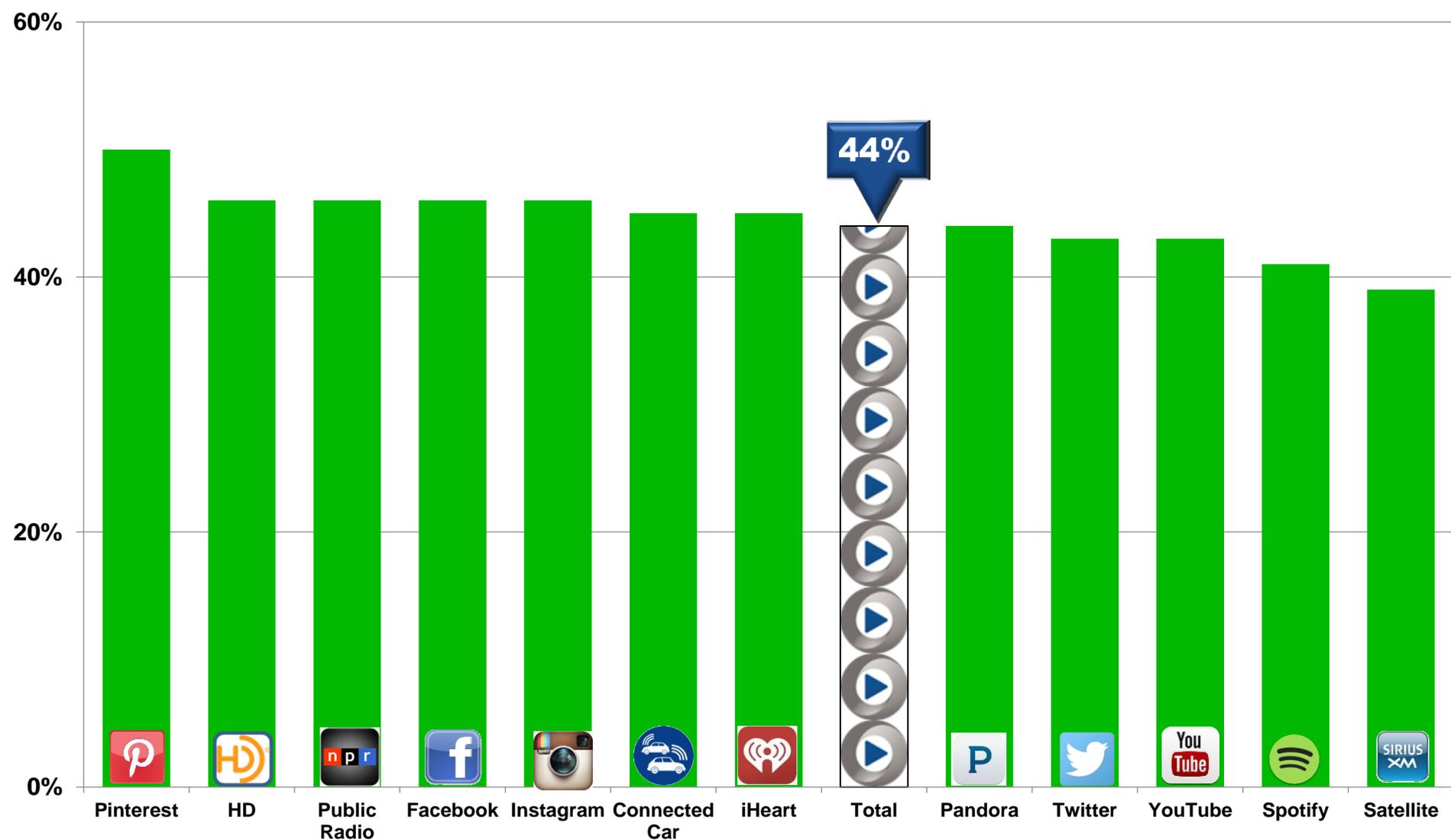
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Brand Platform Pyramid 2015



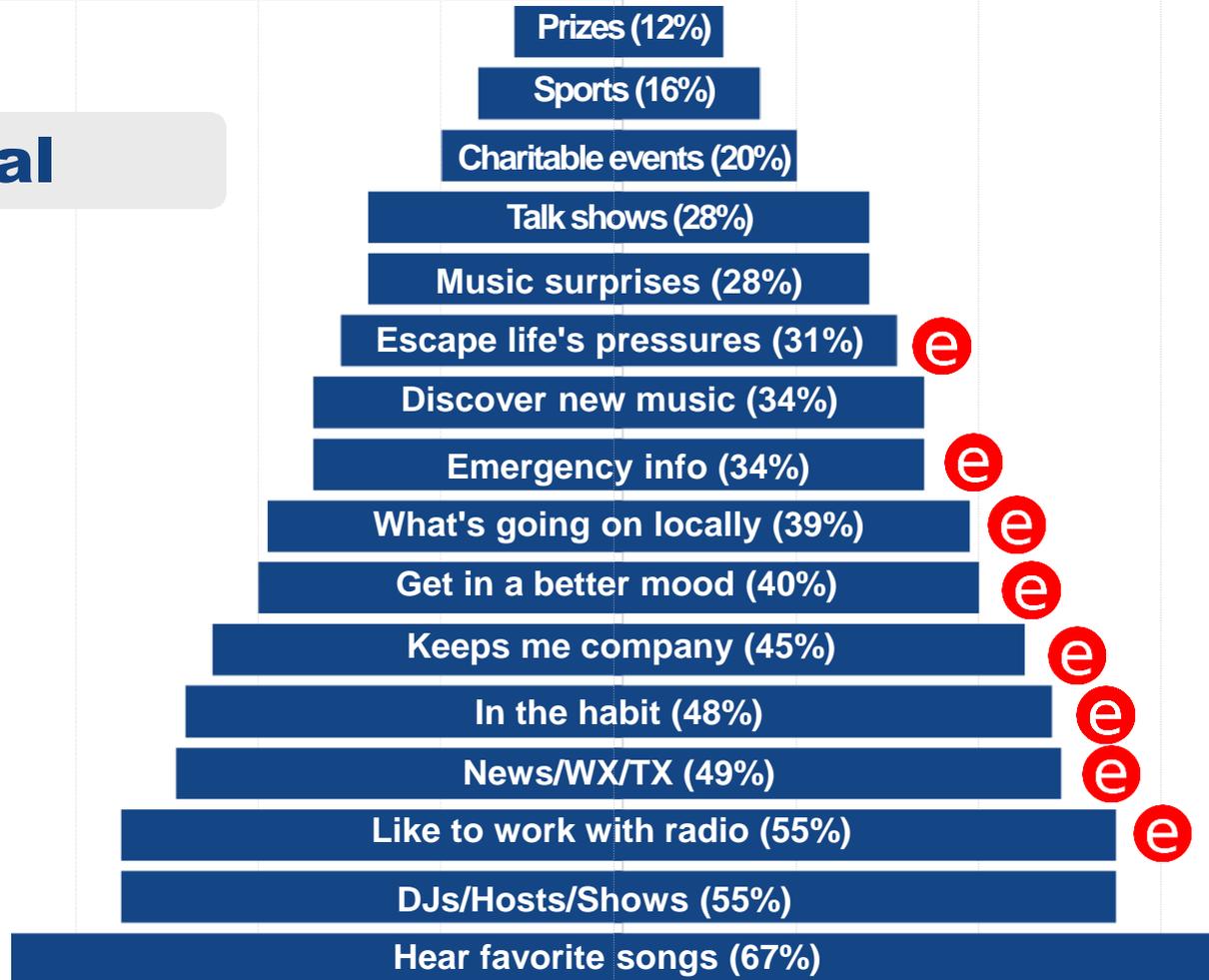
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Weekly users of brands like YouTube & Pandora are just as likely to recommend radio stations.



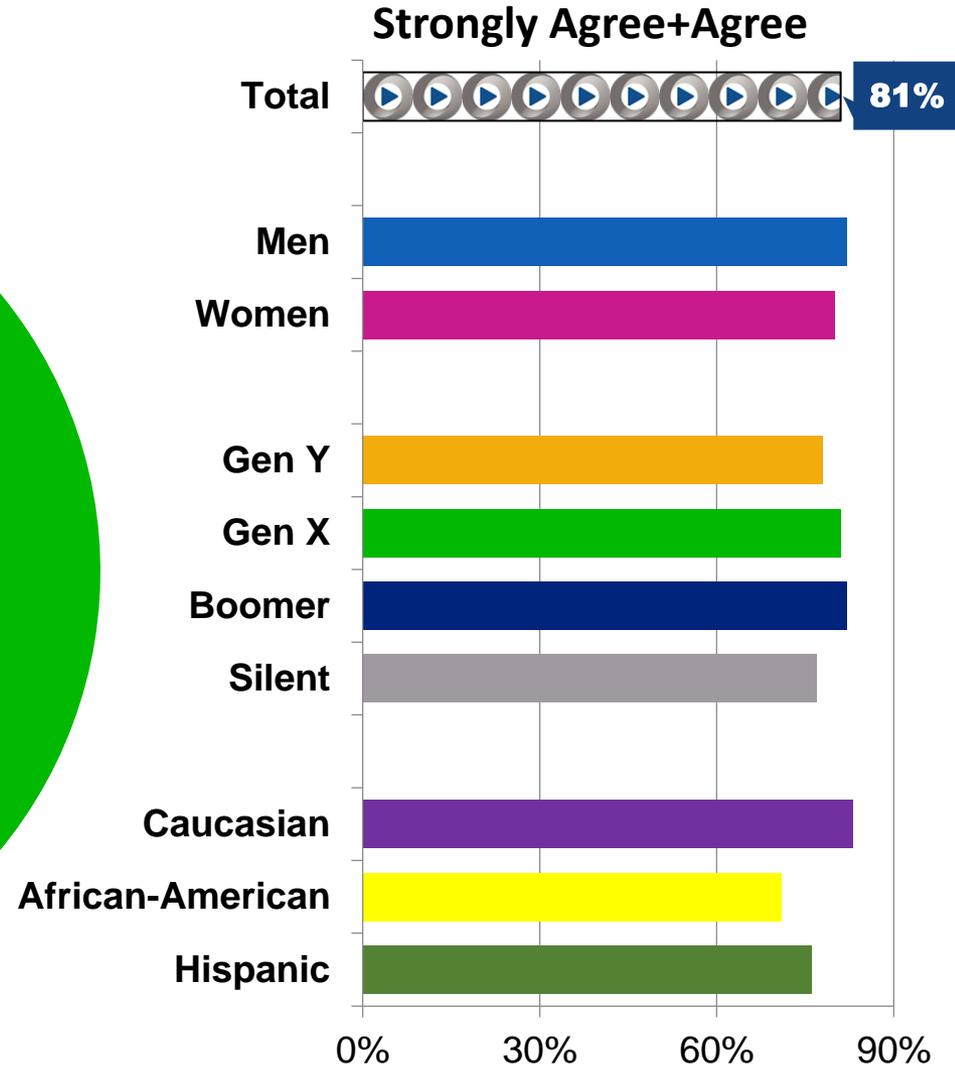
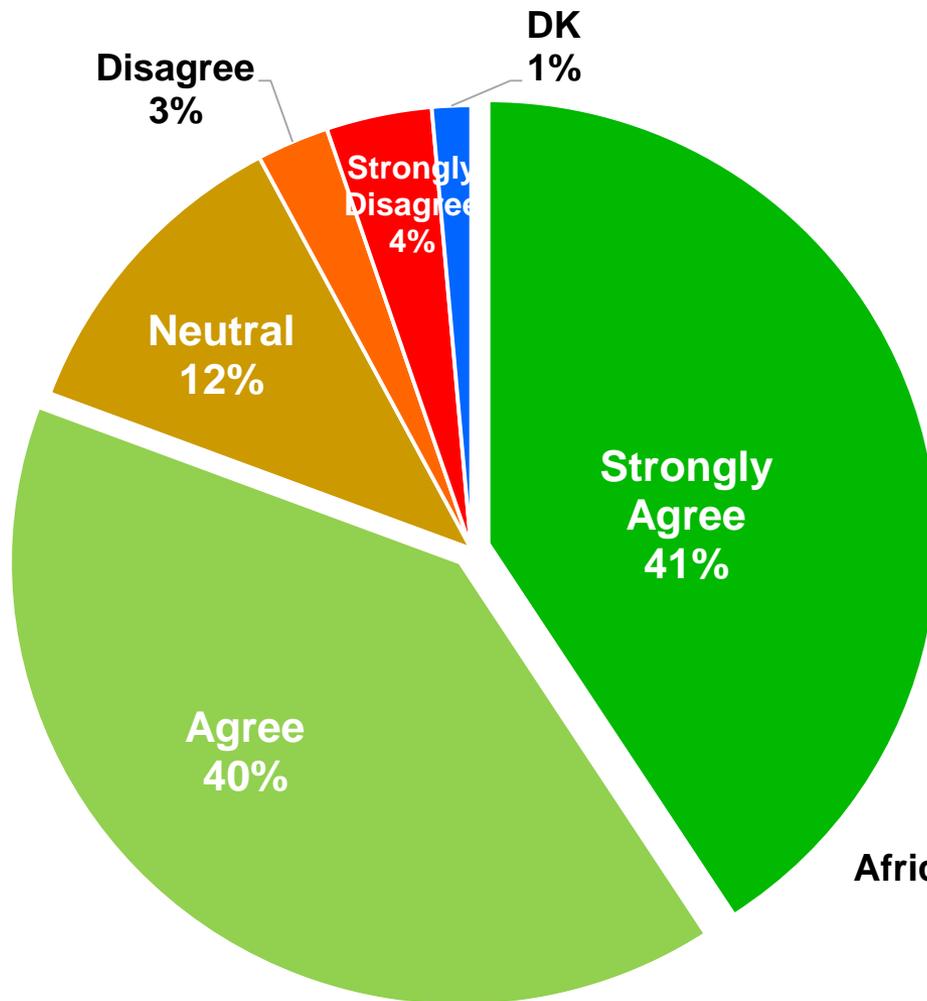
Beyond playing the hits & personality, radio provides many strong “emotional benefits.”

Total



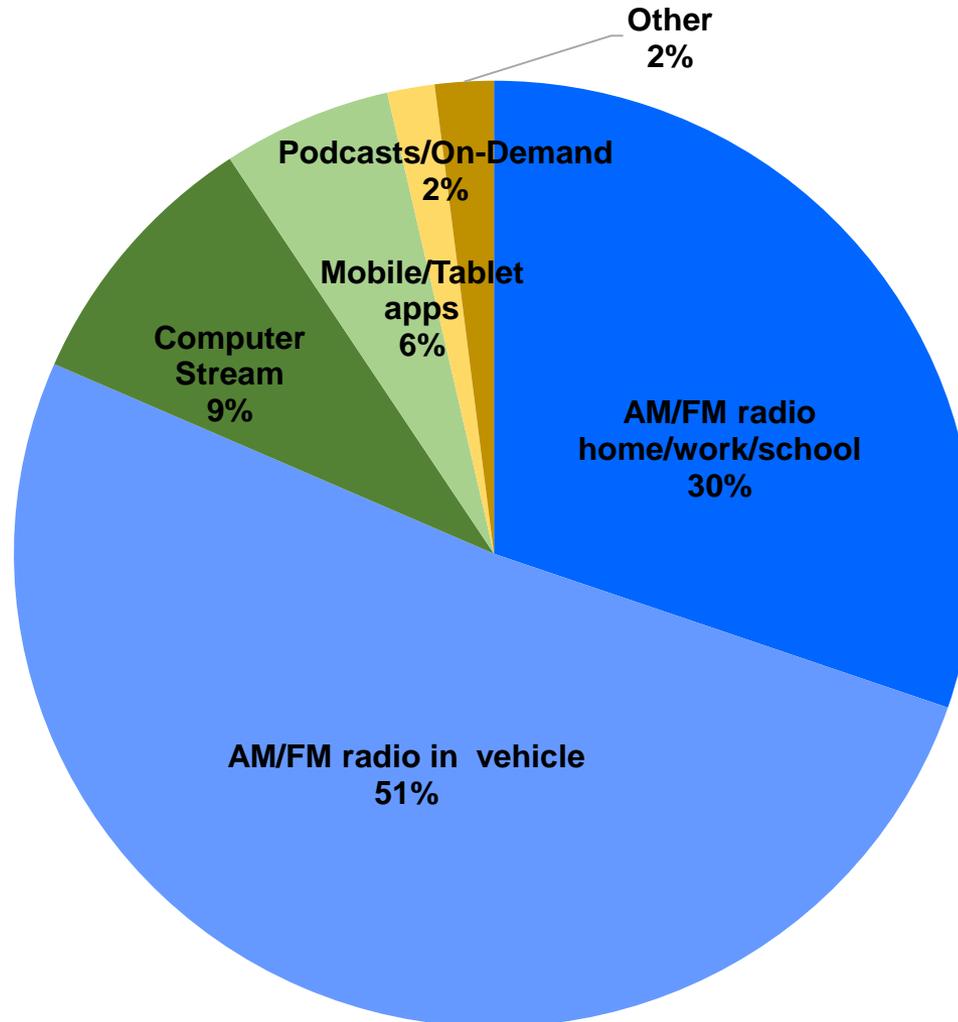
Main Reason

Local truly matters to radio listeners.



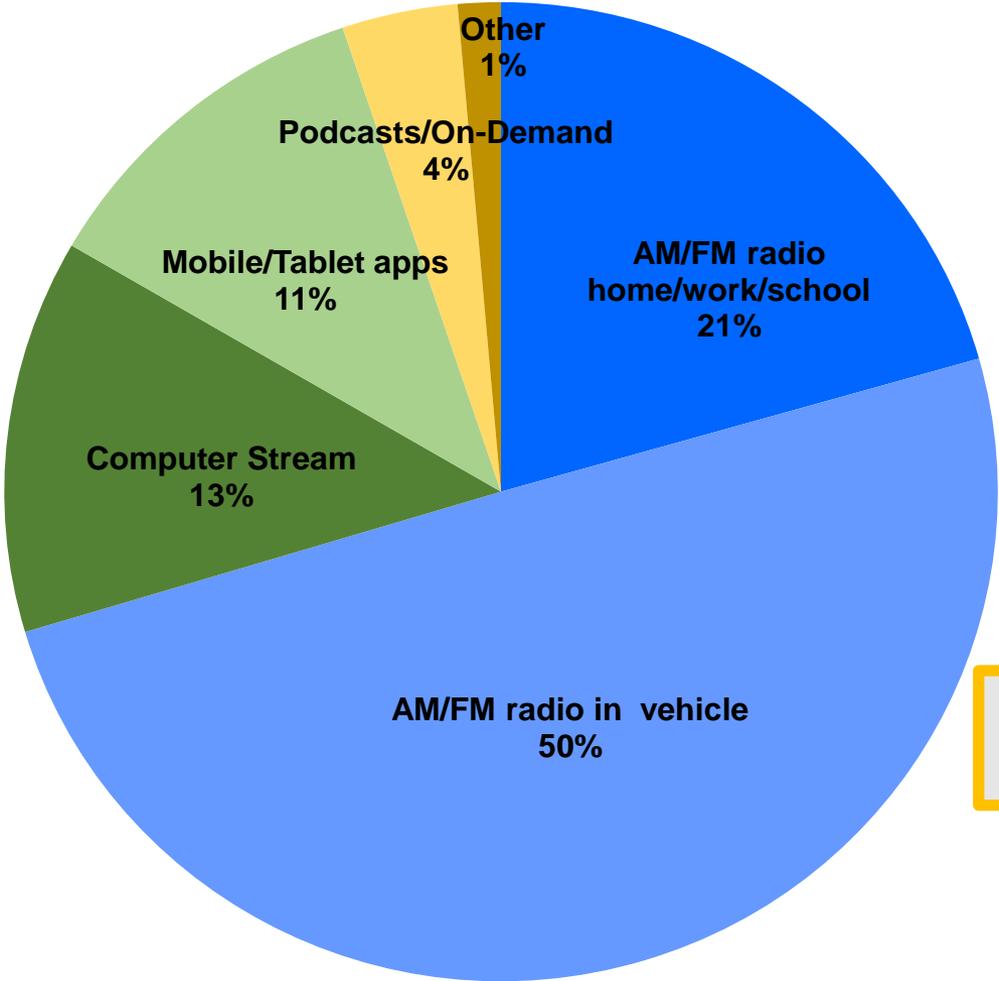
“One of radio’s primary advantages is its local feel.”

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



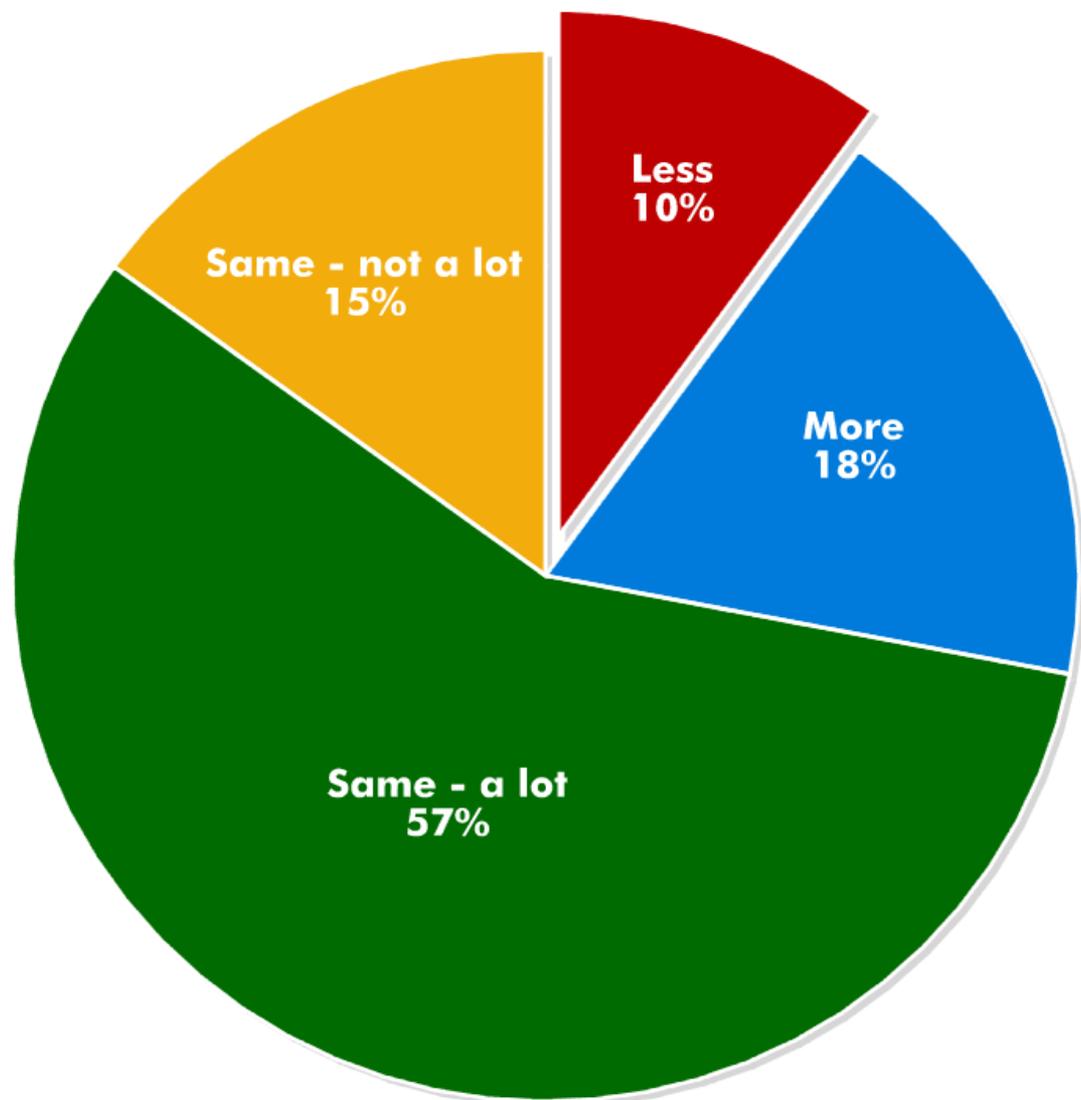
Traditional – 81%
Digital – 17%

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



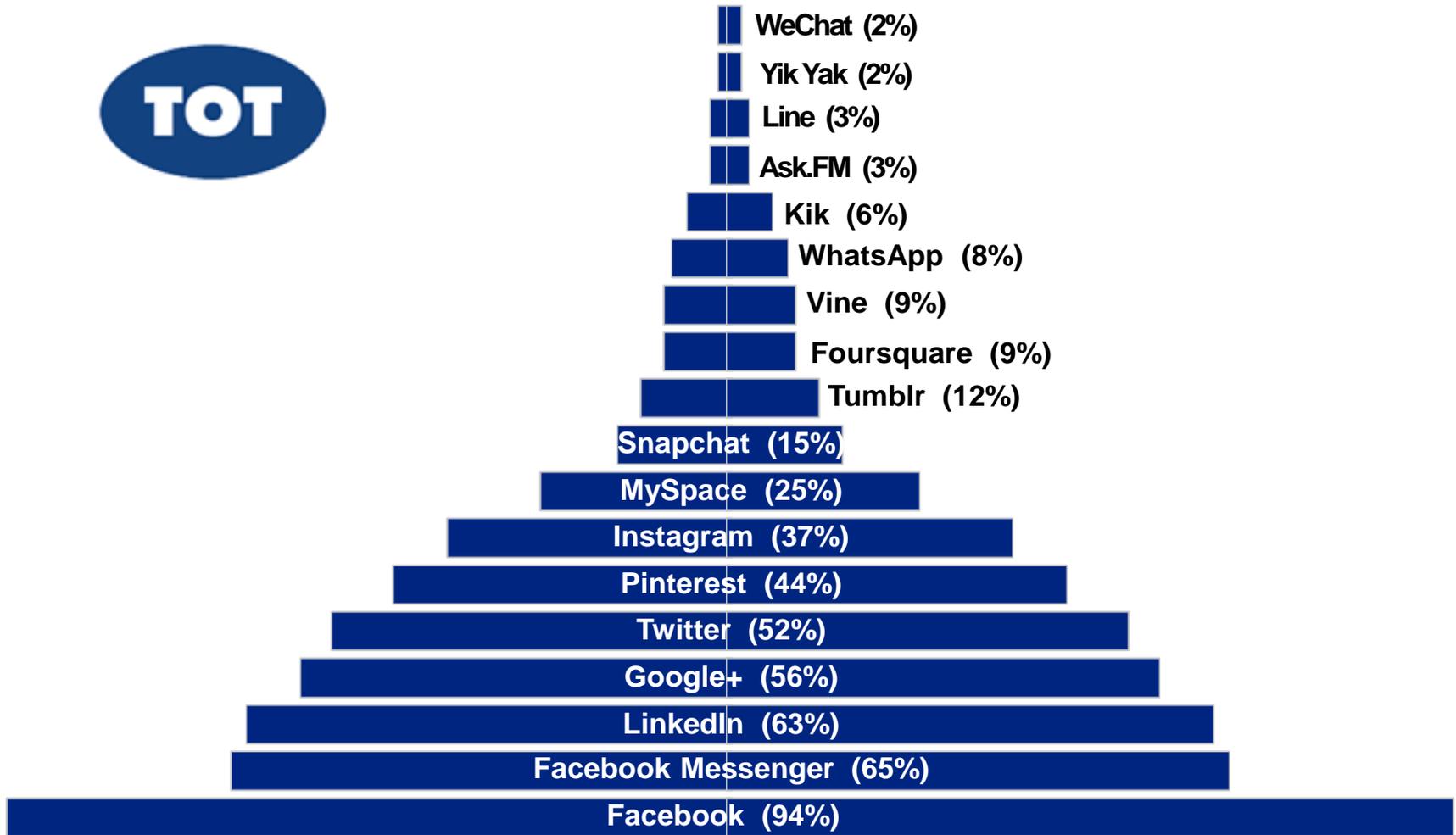
Traditional – 71%
Digital – 28%

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



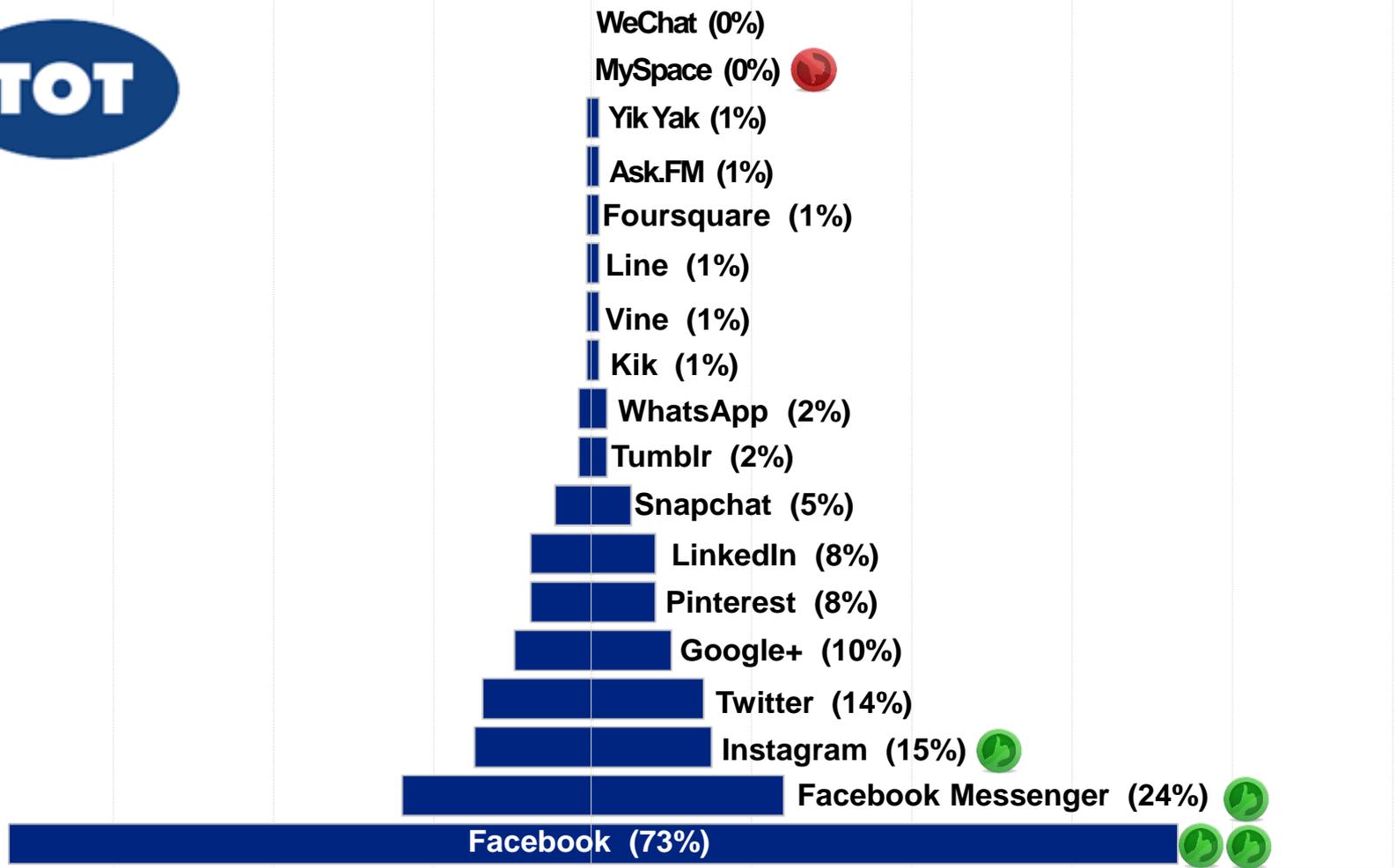
Past Year

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



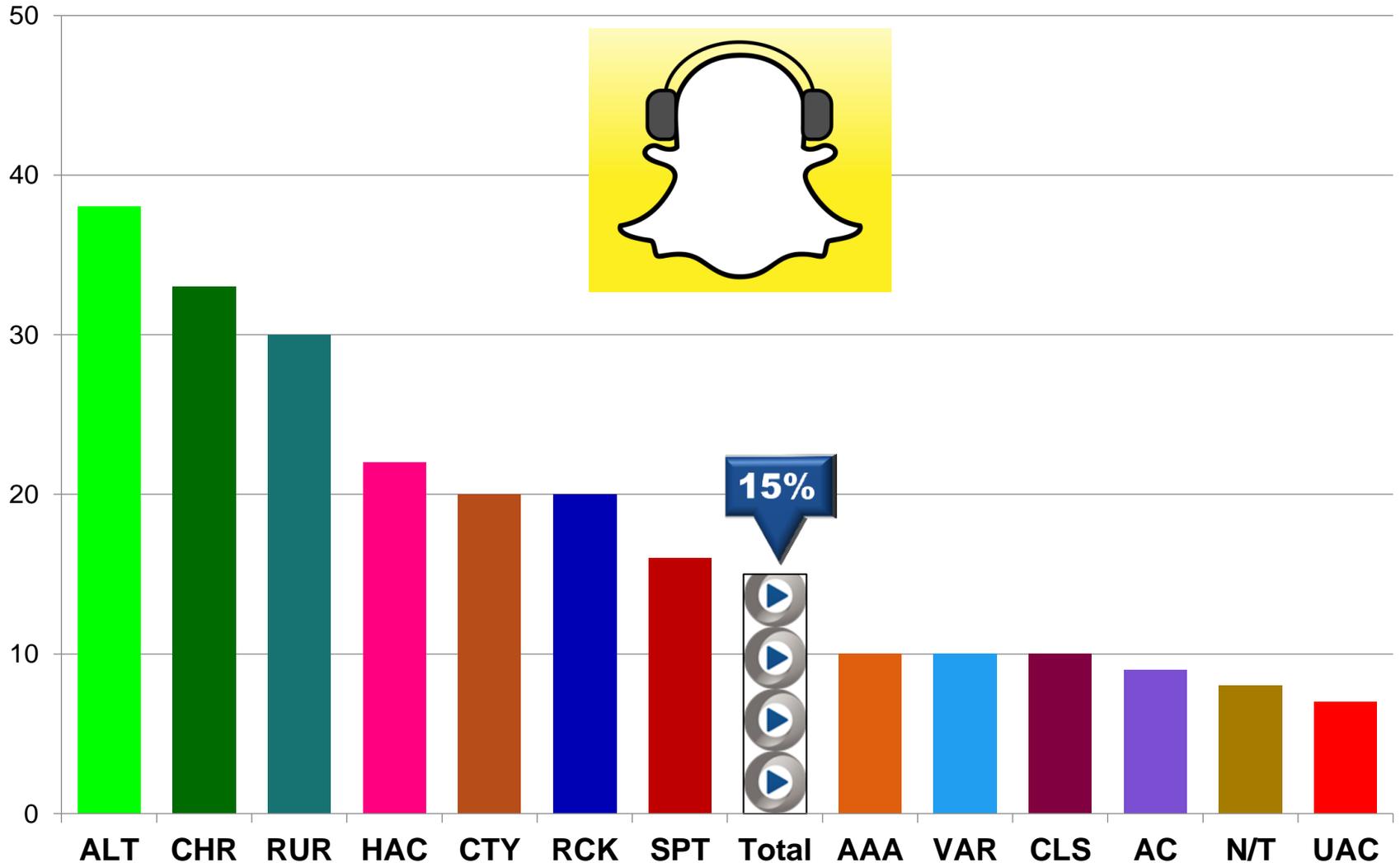
Of those with a social media profile

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



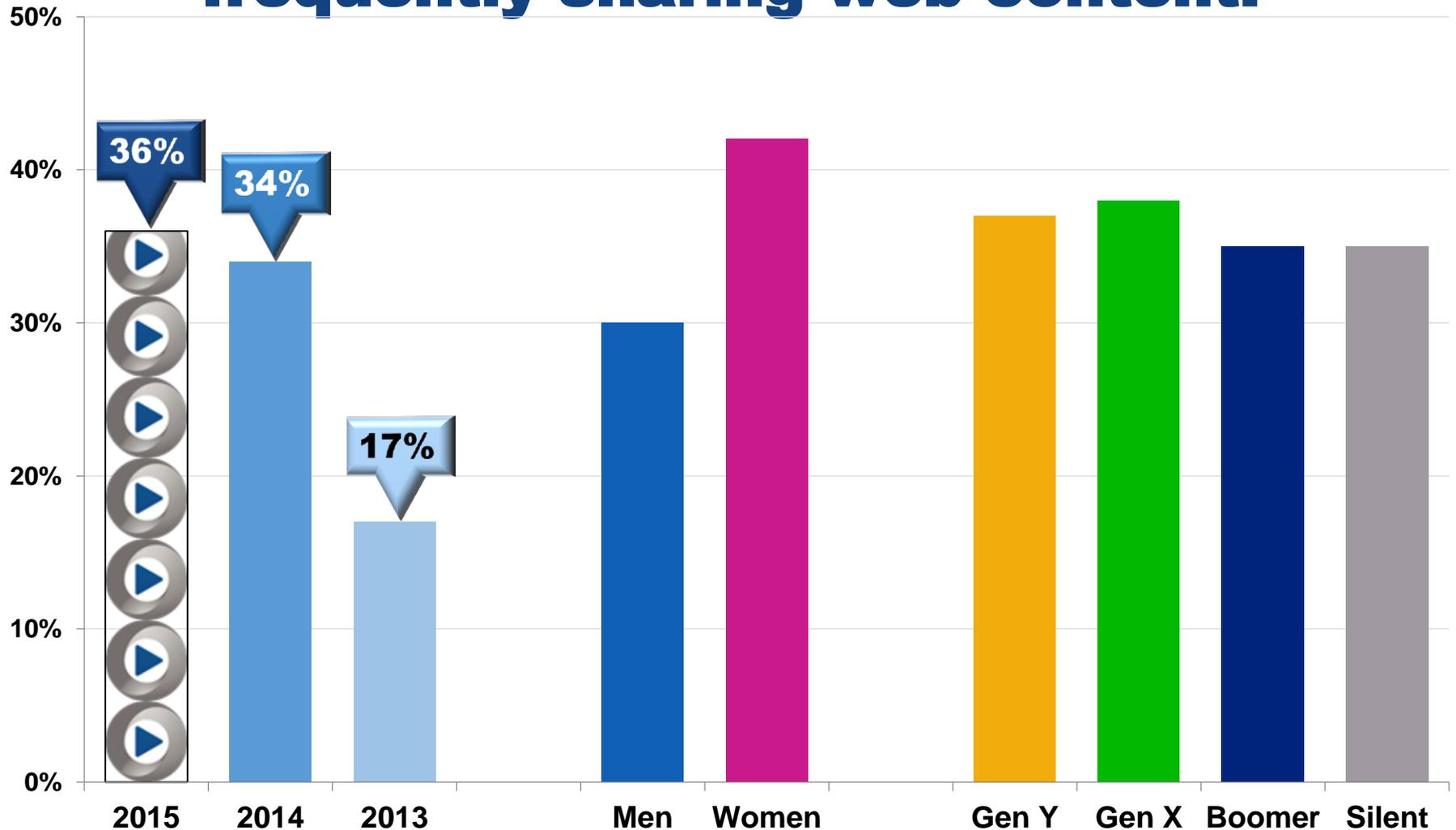
Among those with a profile on each platform

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



Among those with a social media profile

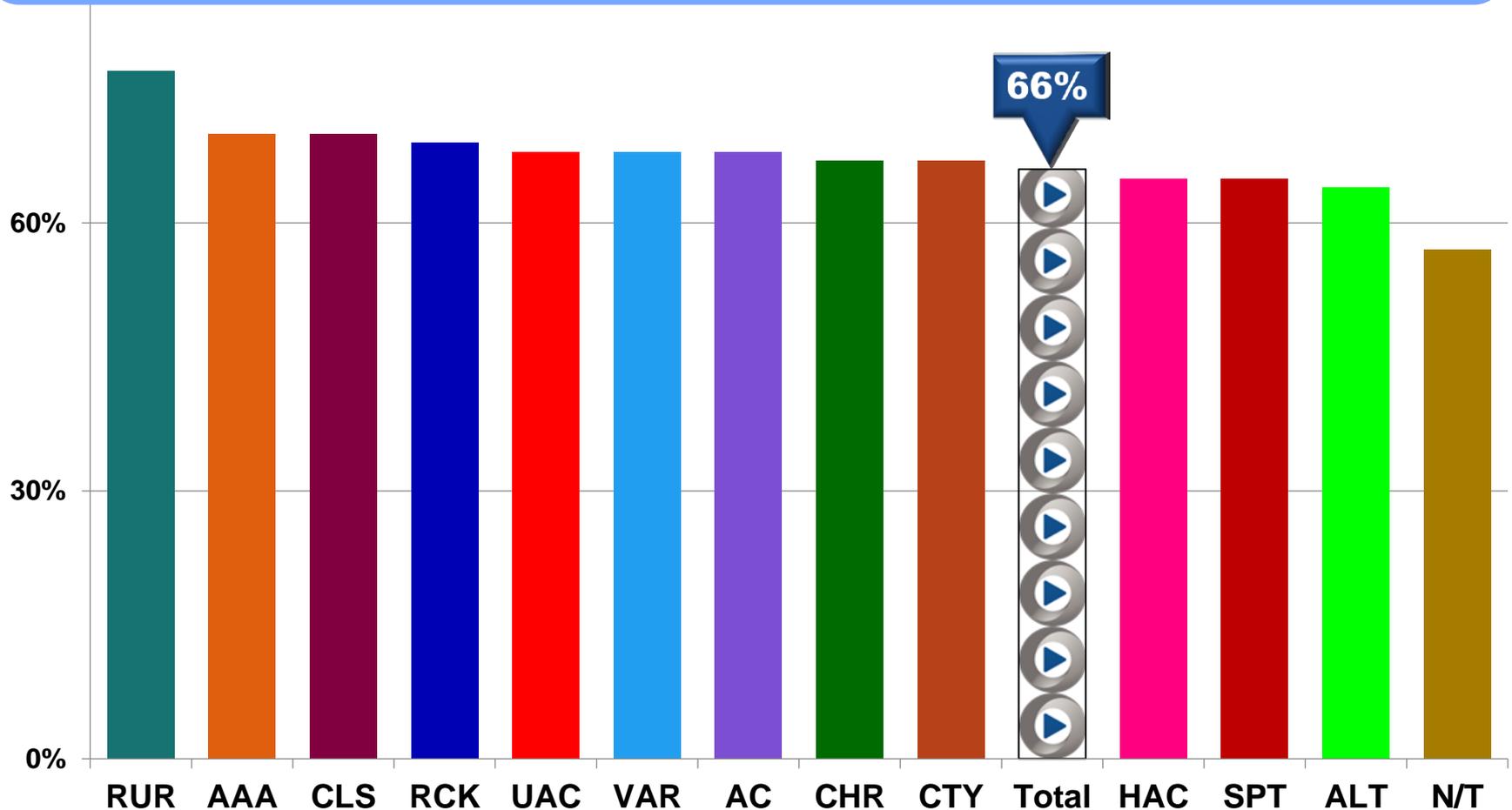
More radio listeners are frequently sharing web content.



“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?”

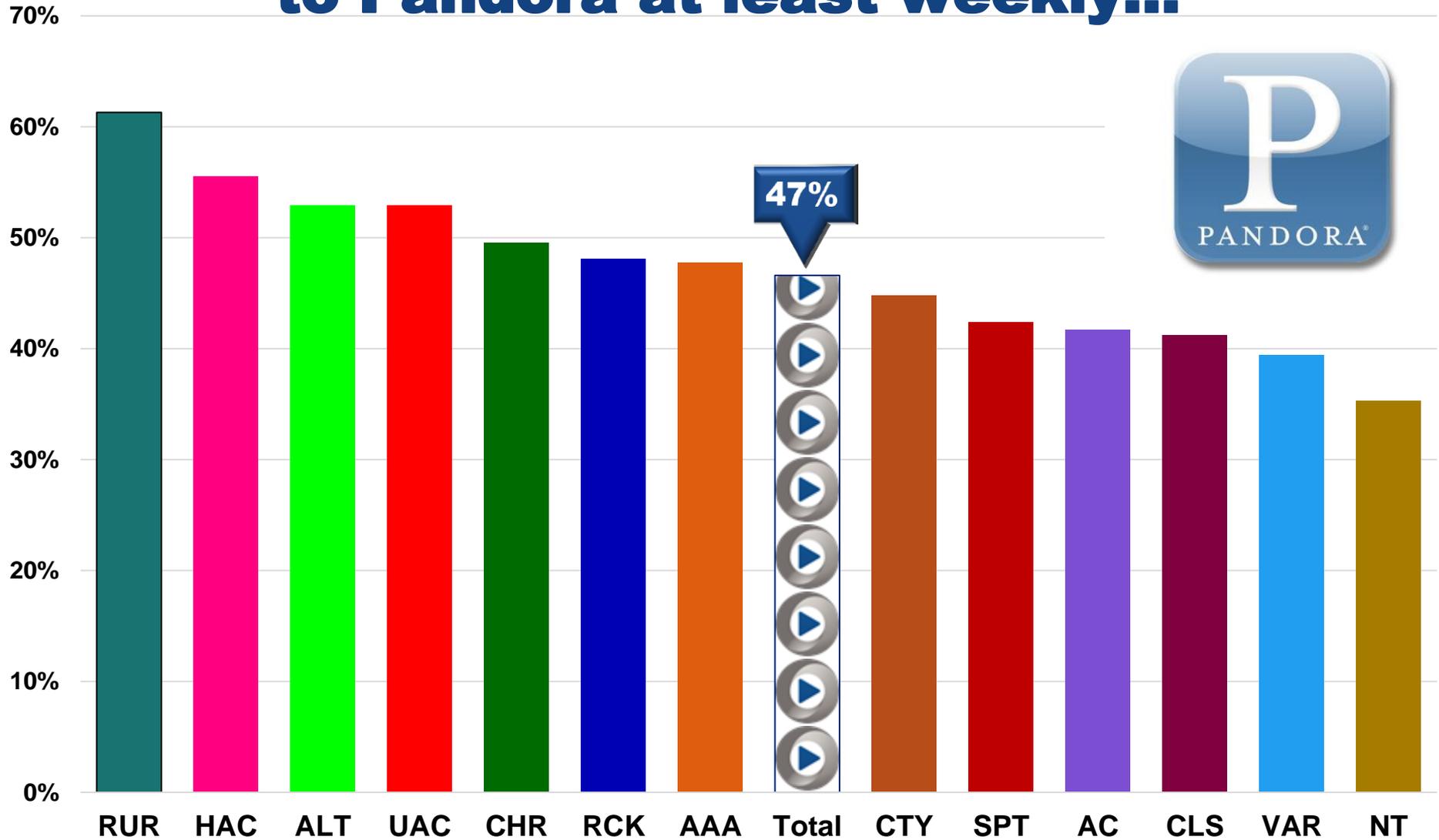
Two-thirds of those who stream their favorite stations would register.

“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?”



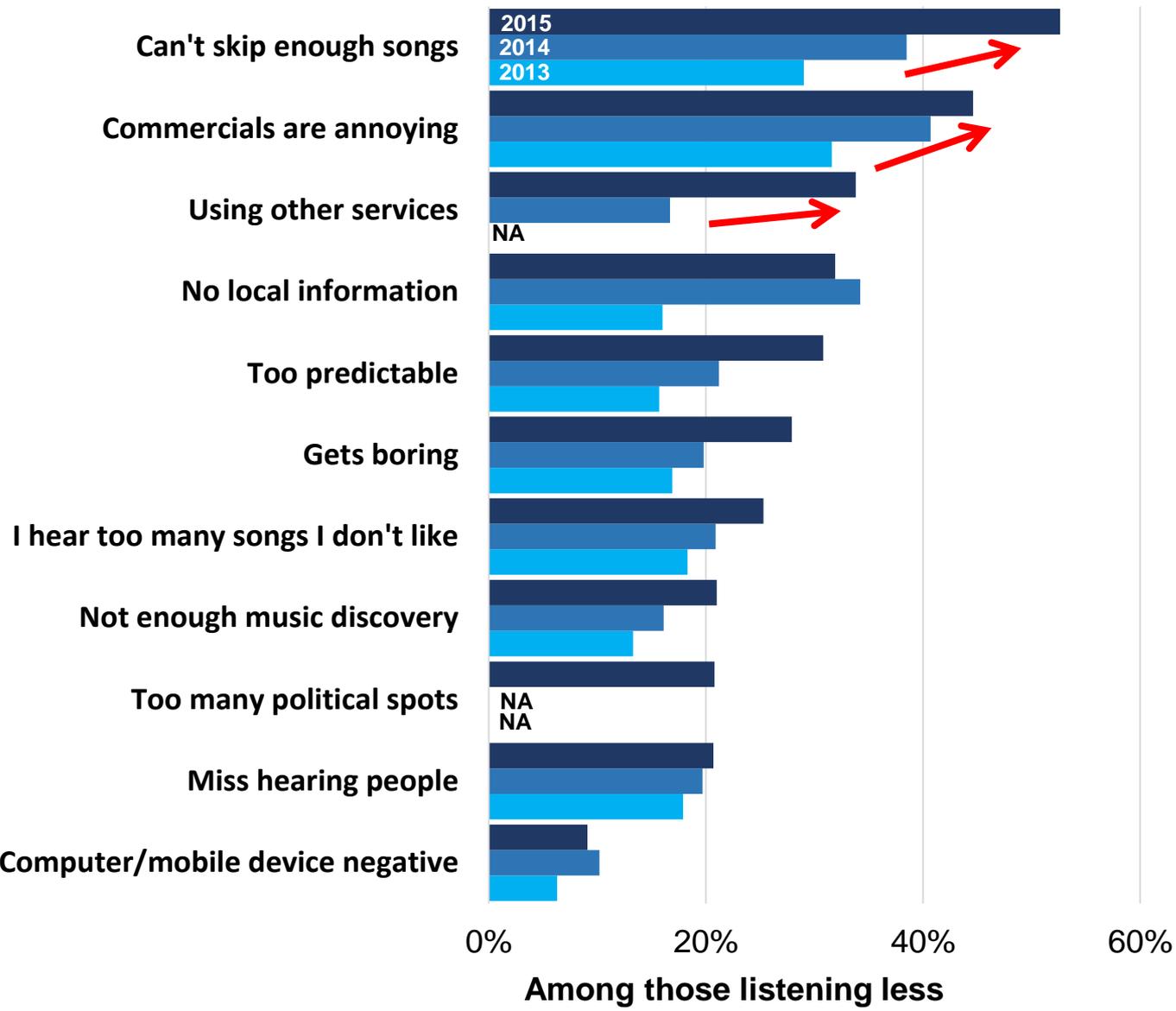
Based on those who listen to the stream of the station that sent them the survey

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

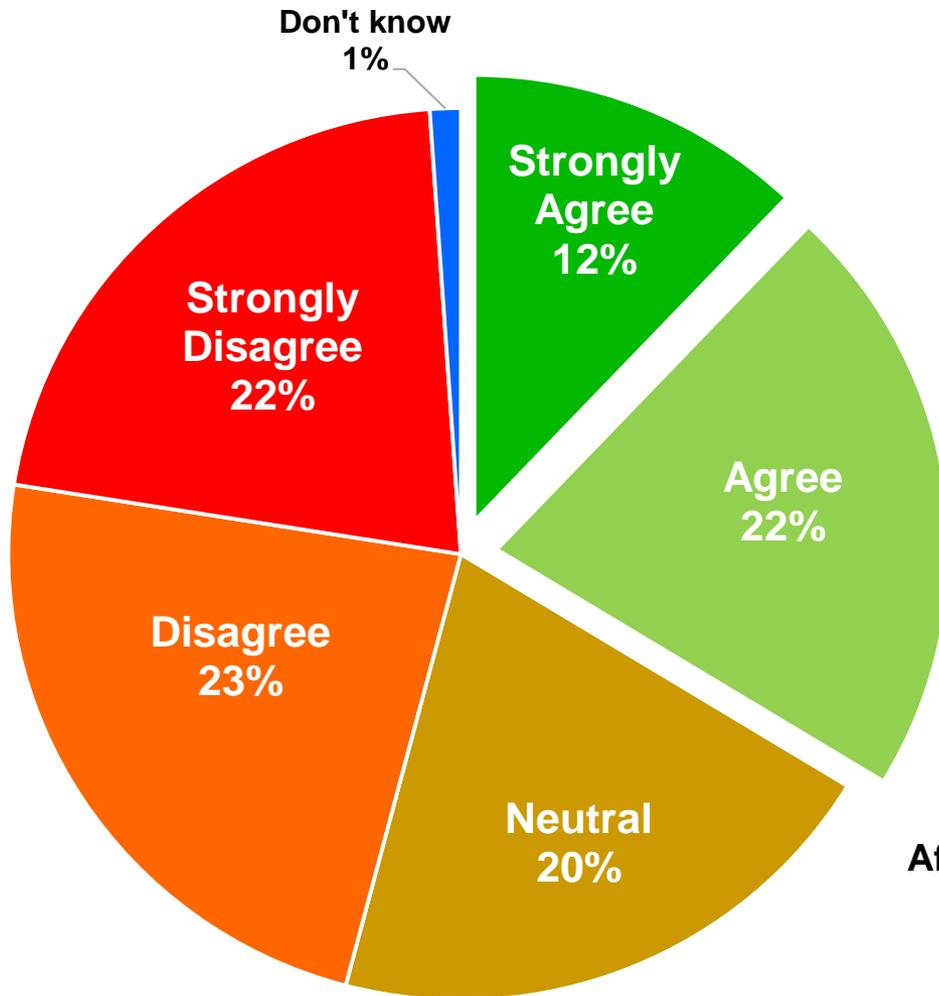


Among those who stream, excluding Canada

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

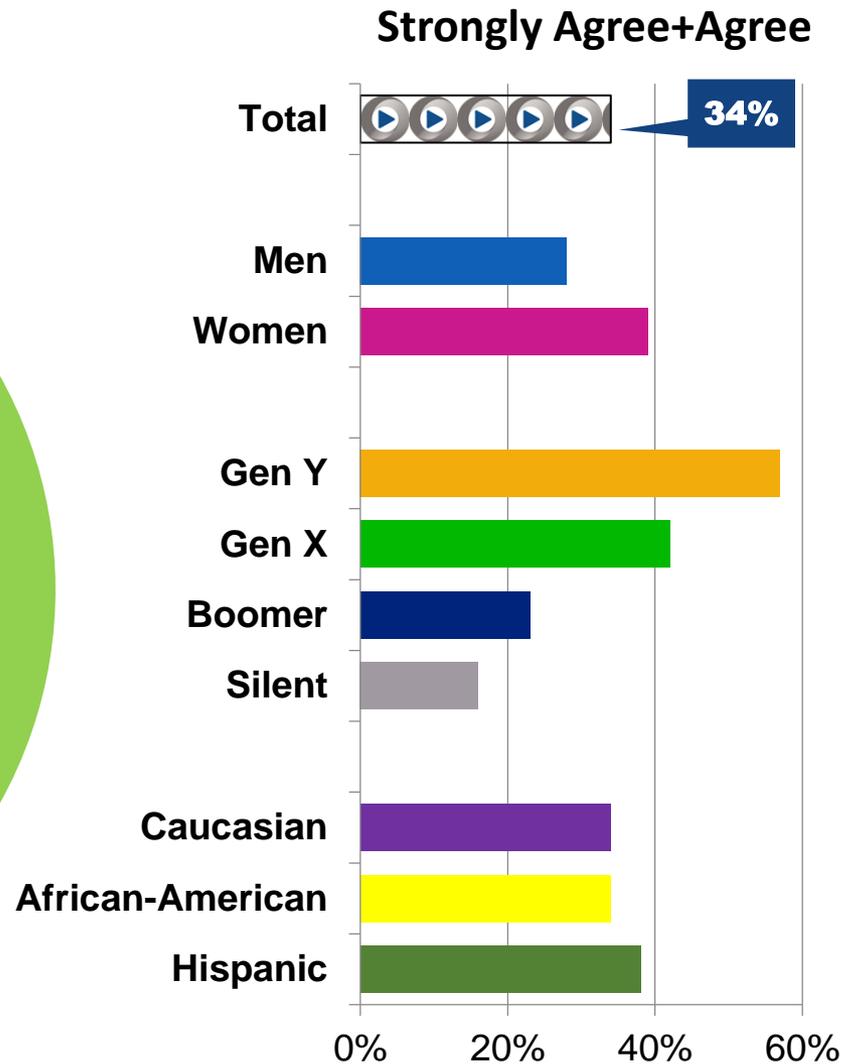


More than one-third admit being addicted to their mobile phones.

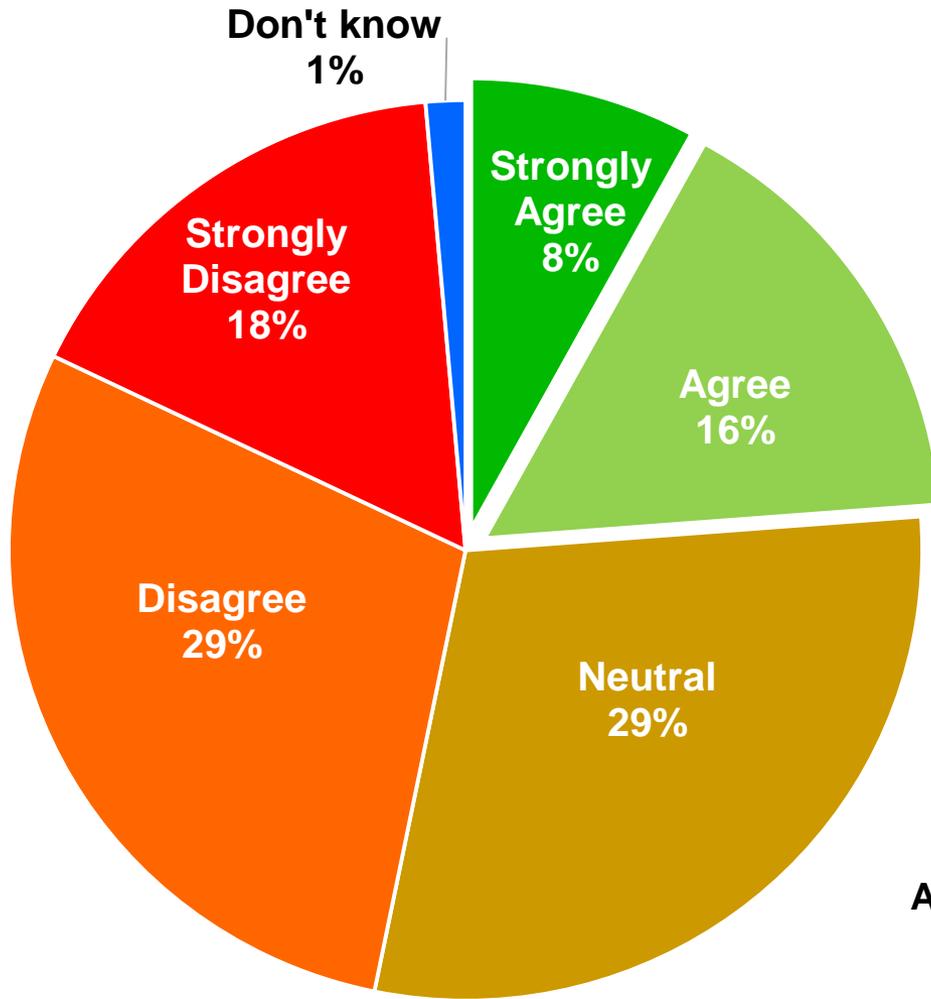


"I am addicted to my mobile phone."

Among cell phone owners

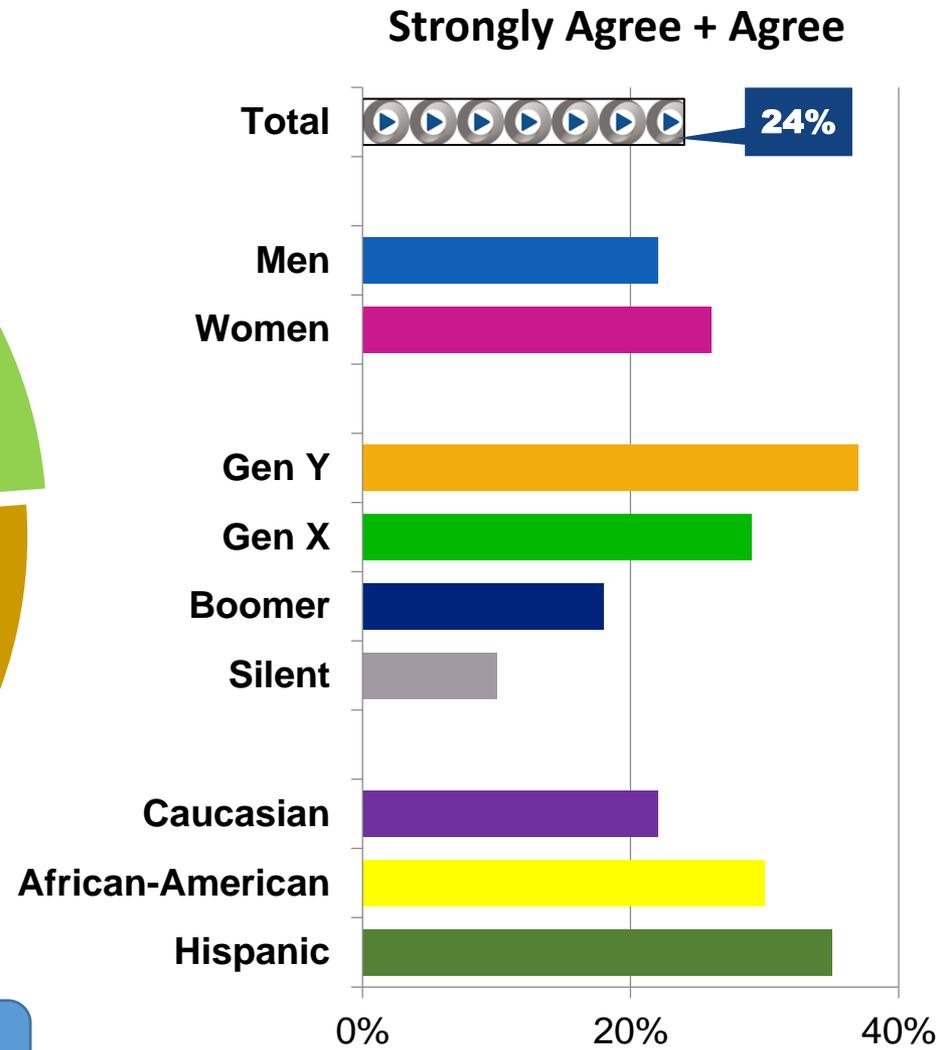


And one-fourth say they'd rather use a mobile device than a computer .

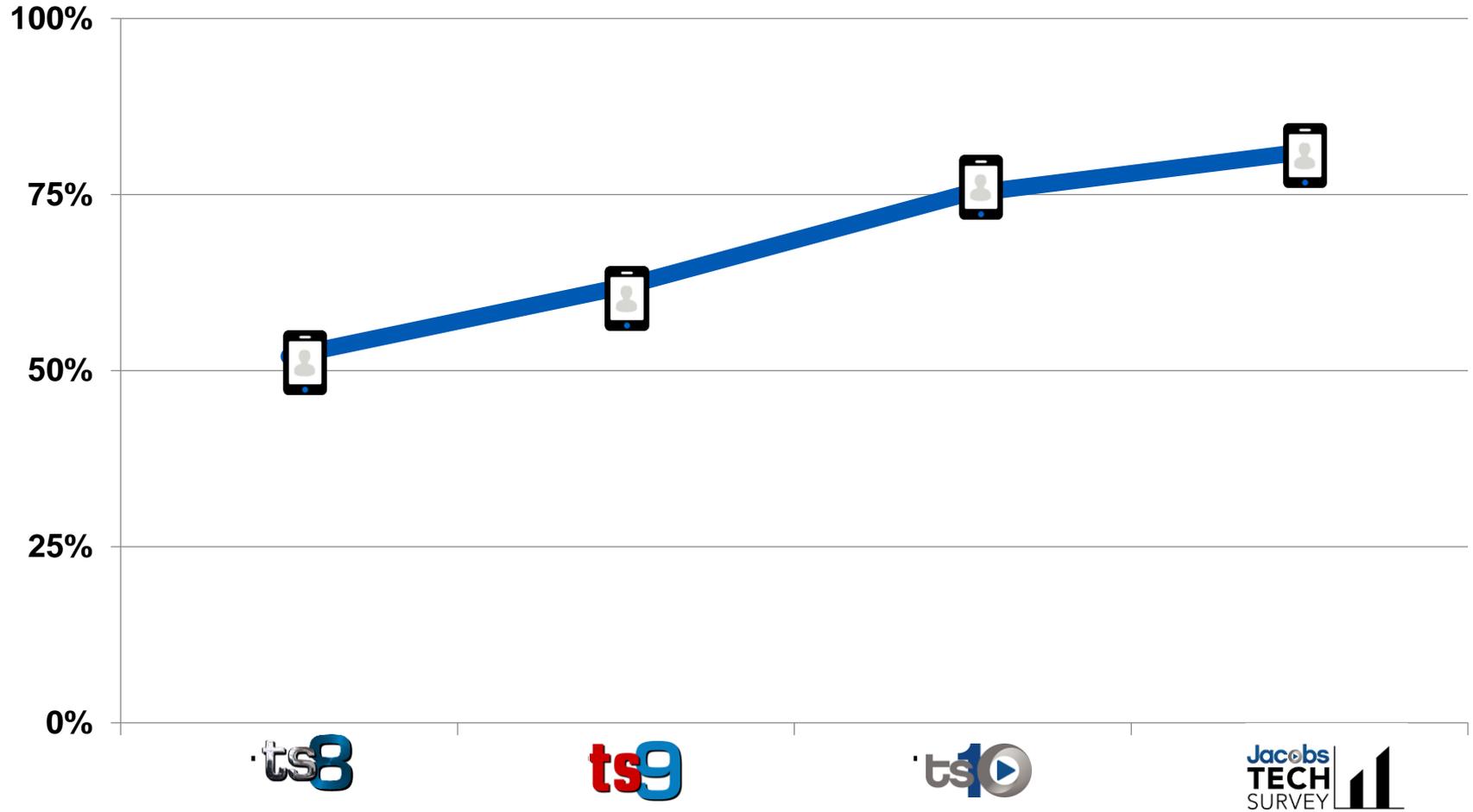


“I prefer using a mobile device to using a computer.”

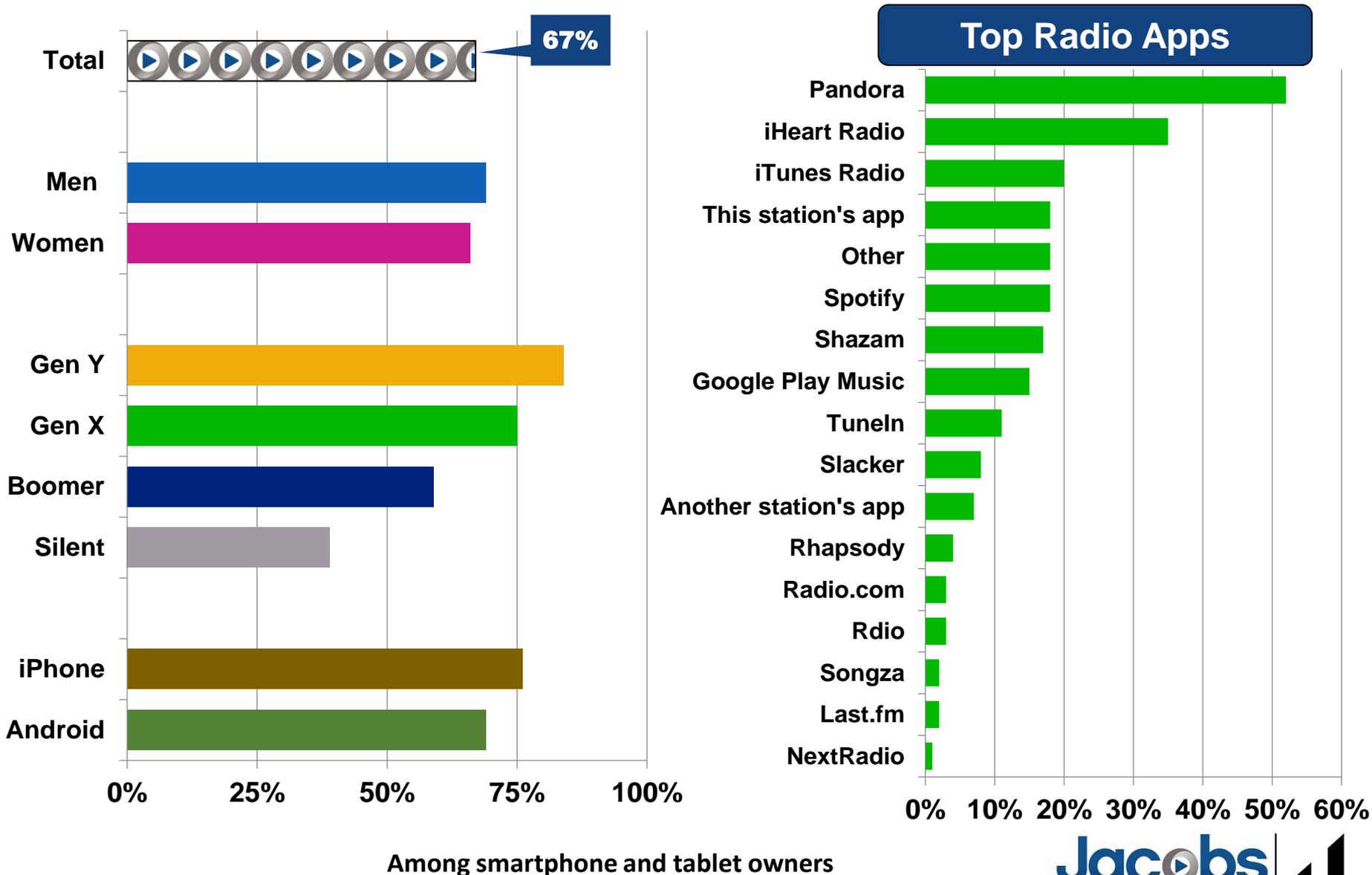
Among cell phone owners



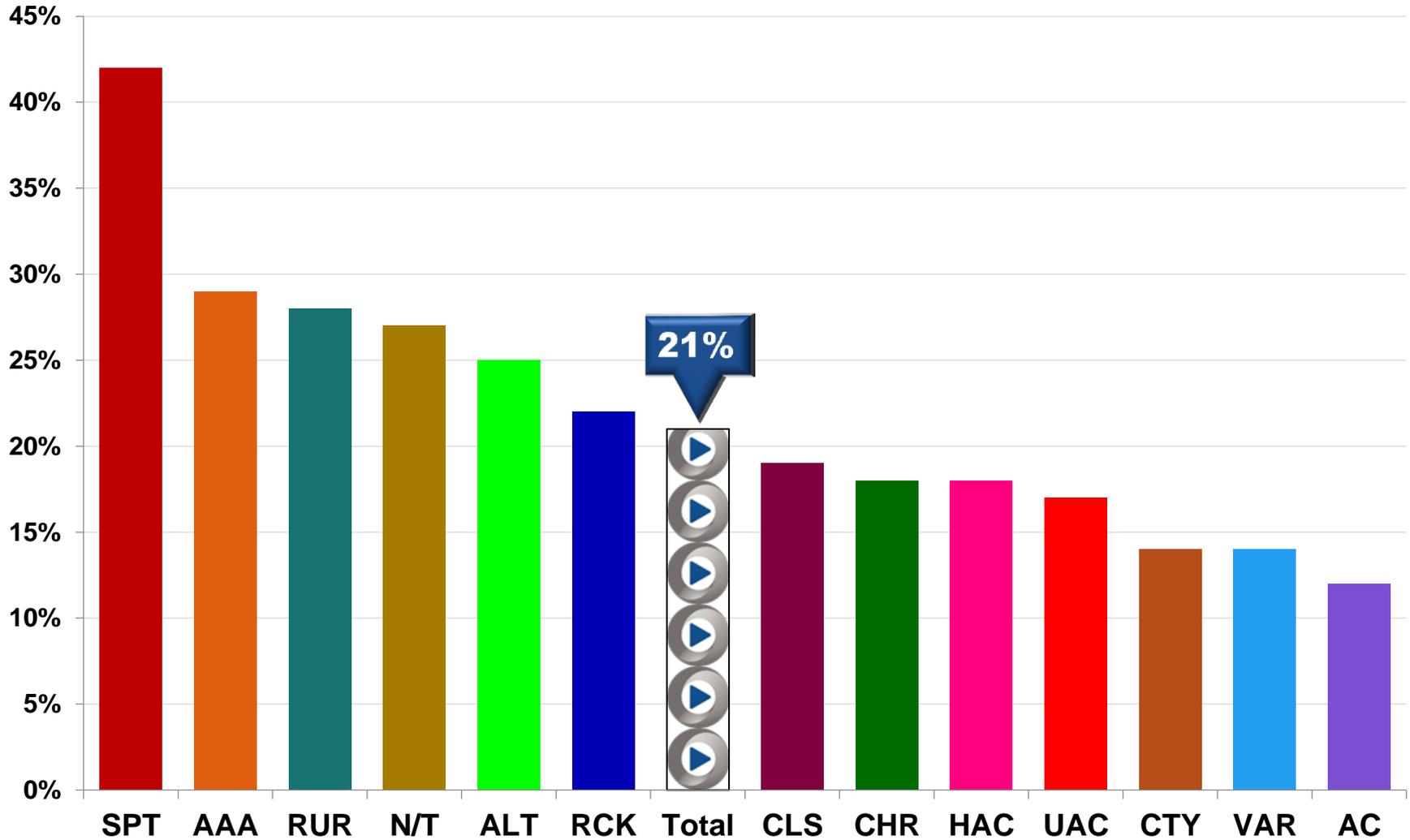
Smartphone Ownership – Trend Line



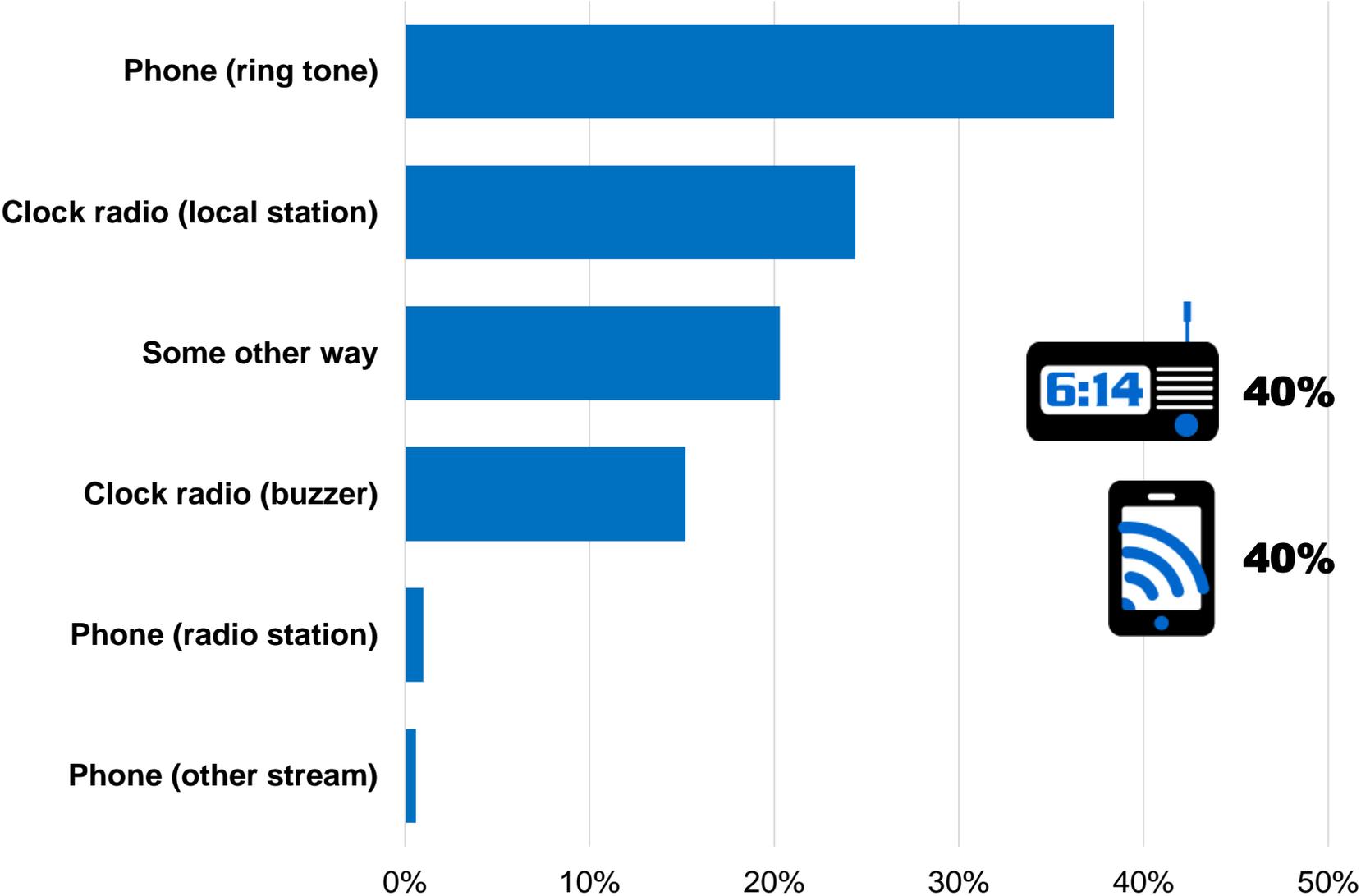
Two-thirds of mobile device owners download radio-centric apps & Pandora leads the pack



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

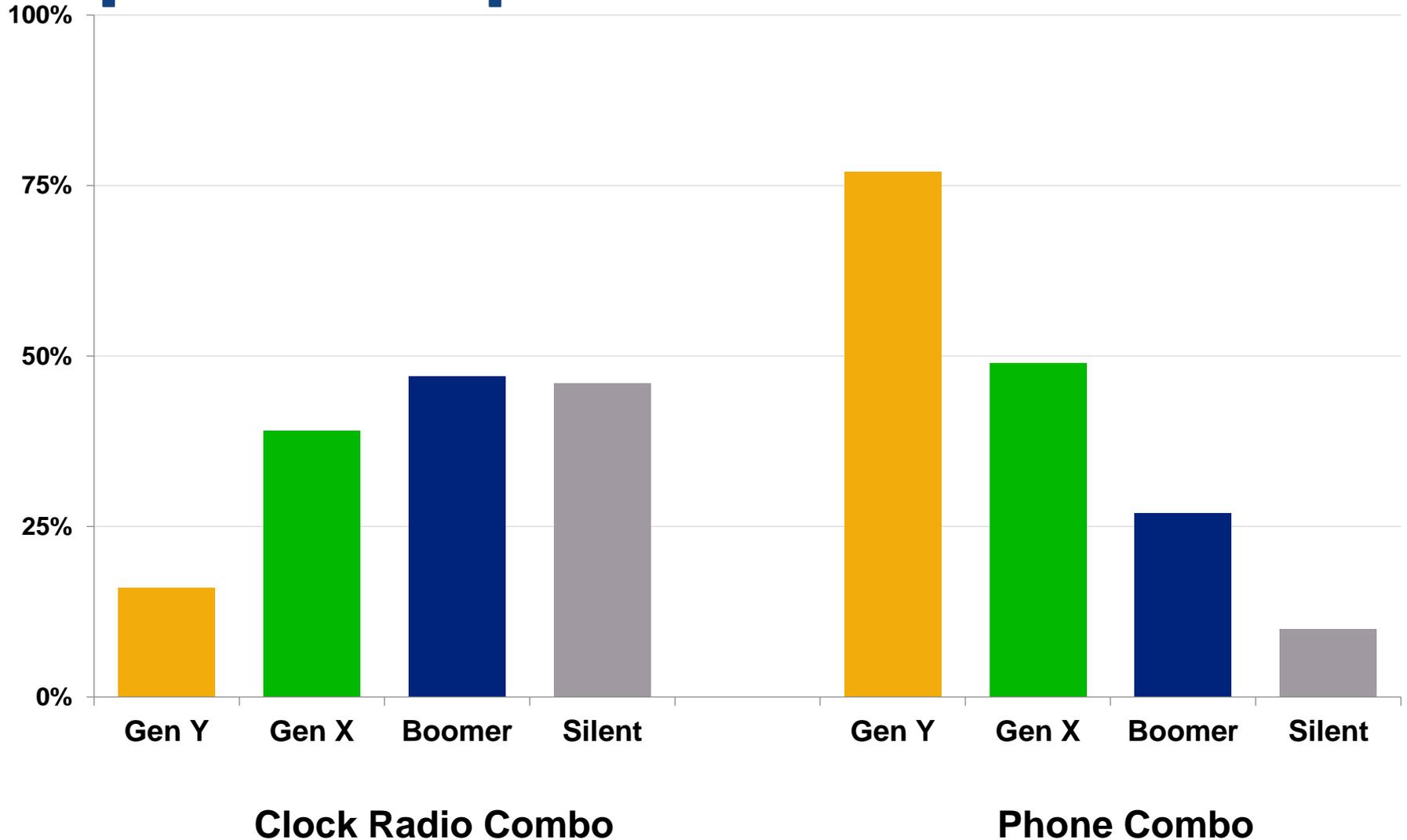


Just as many consumers wake up to a mobile phone as they do a clock radio.



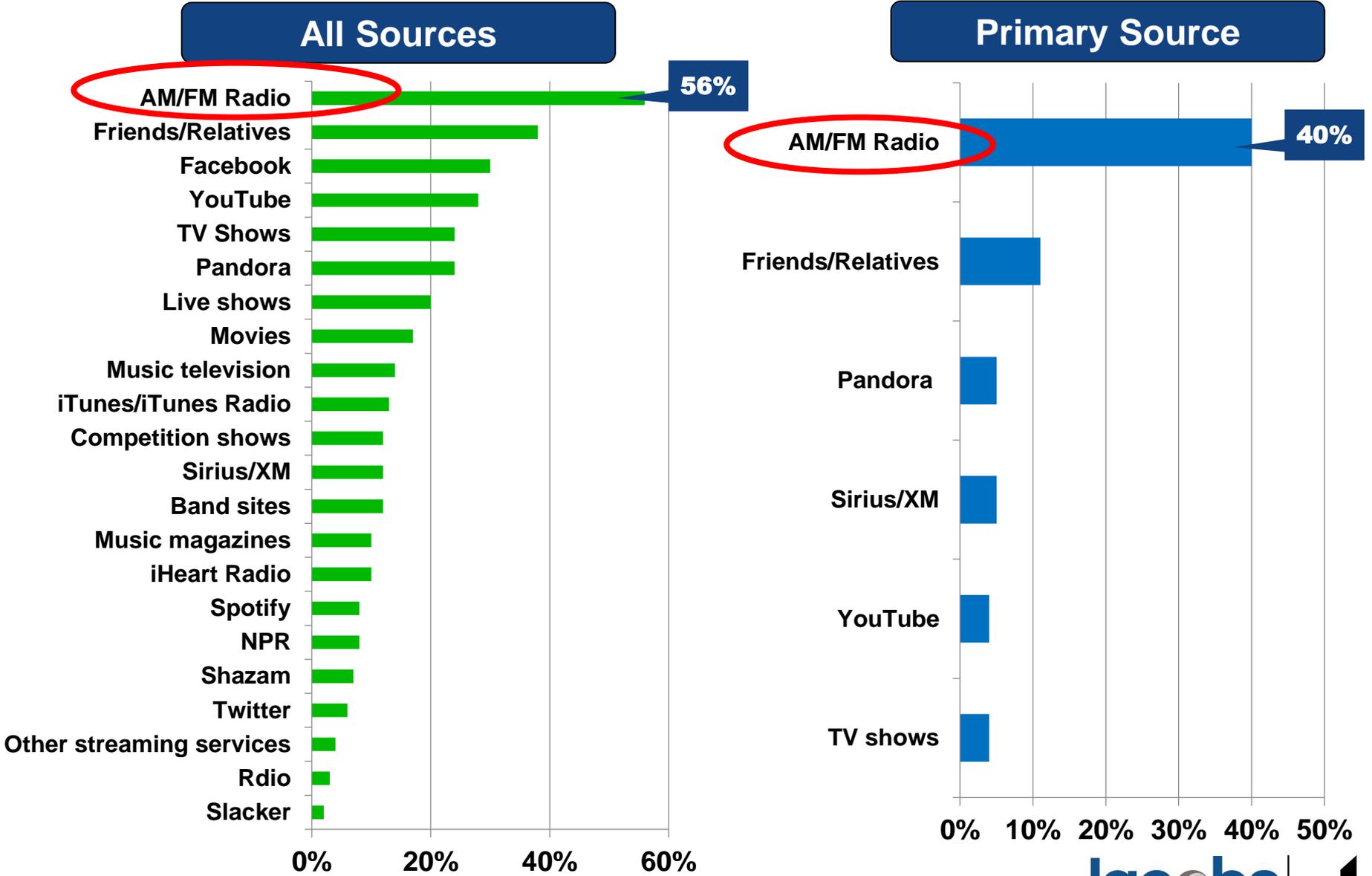
Among cell phone owners

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



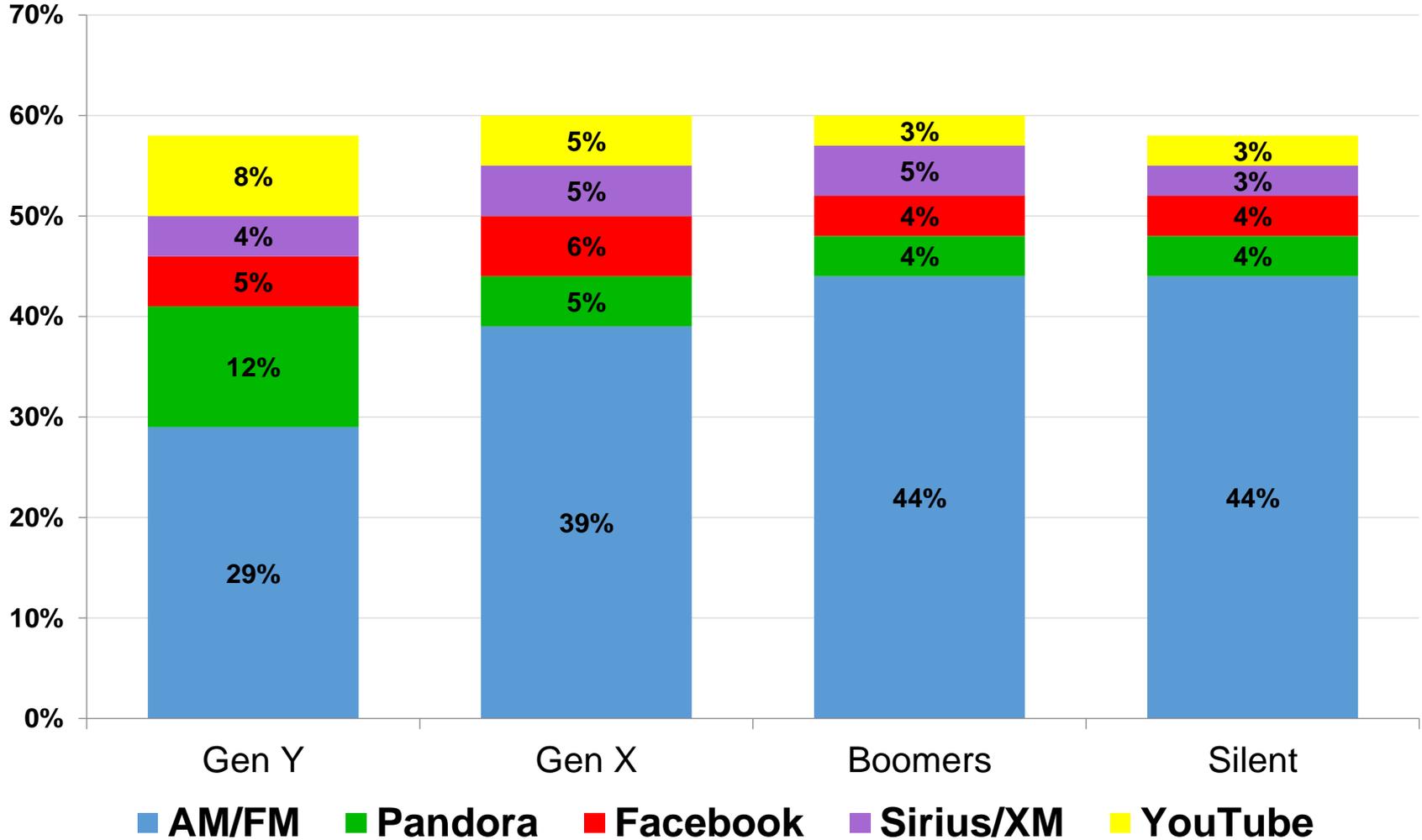
Among cellphone owners

Radio continues to lead in new music discovery.



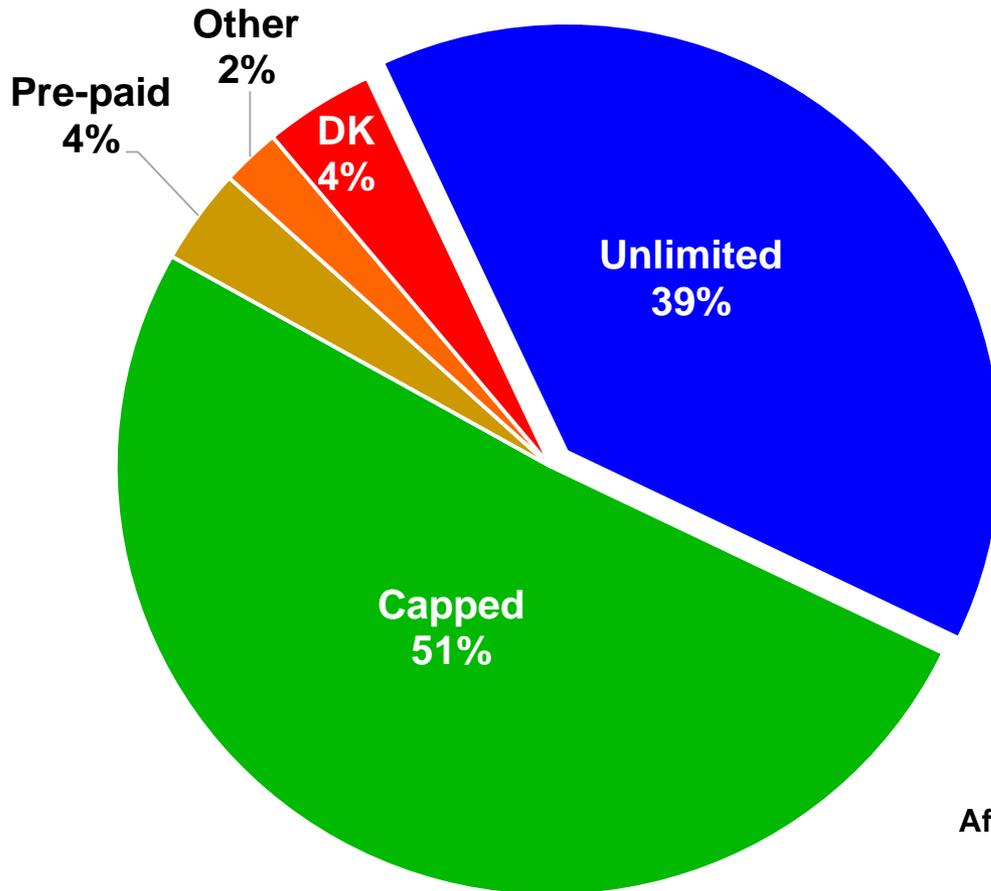
Among those interested in new music/artists

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



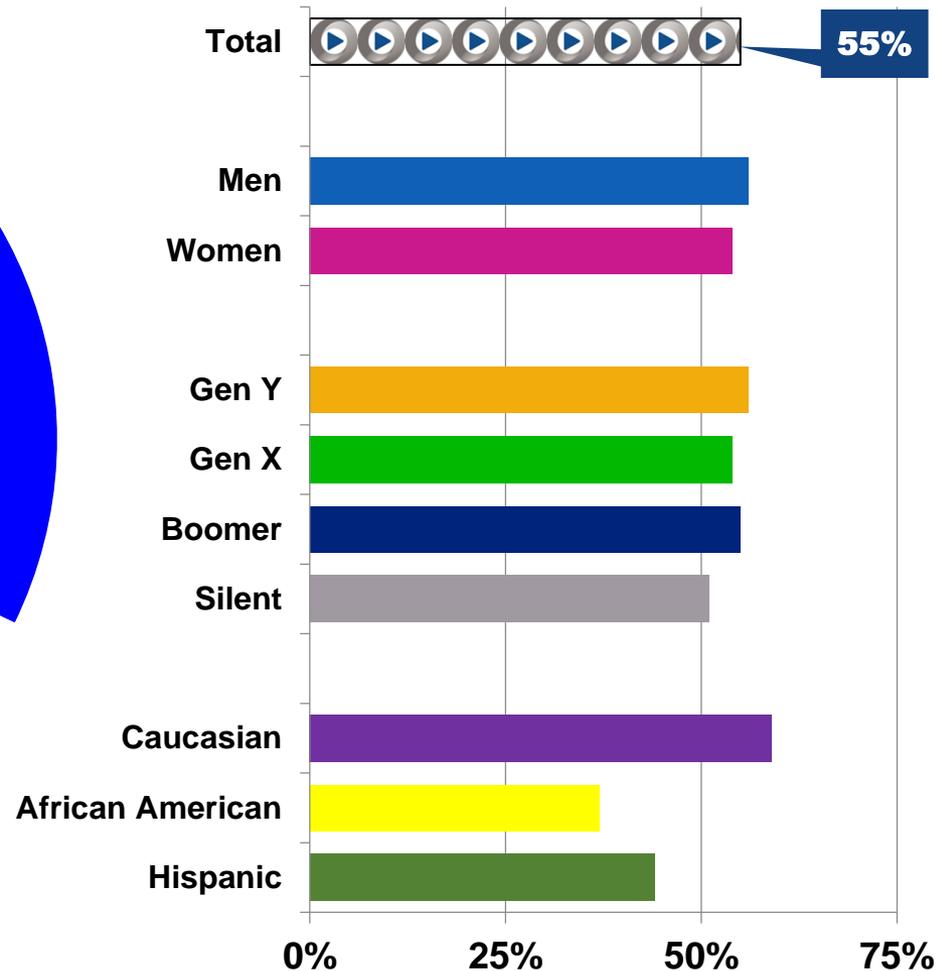
One choice only among those interested in new music

More than half of smartphone owners have limited data plan.

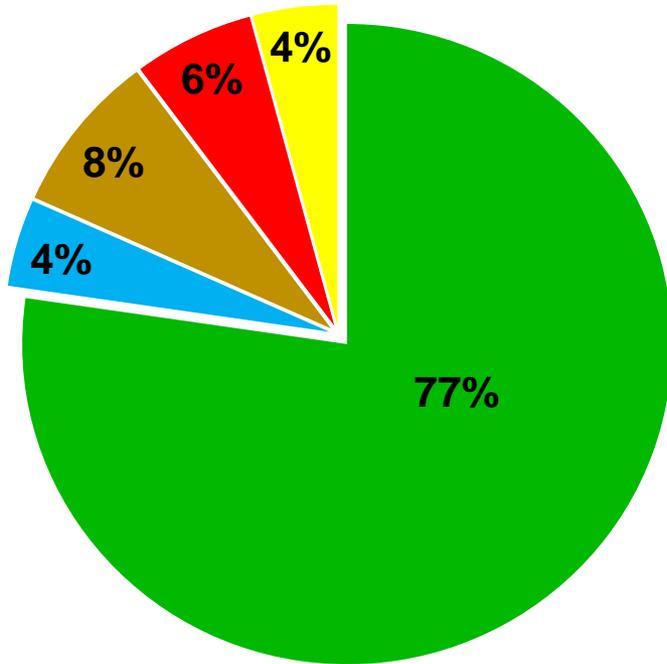


Among smartphone owners

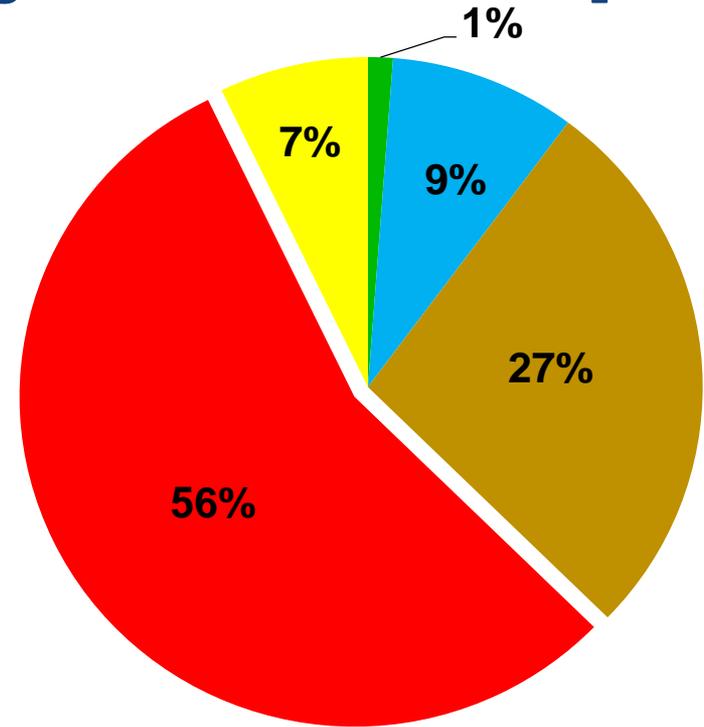
Capped + Pre-Paid



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



Unlimited Plan

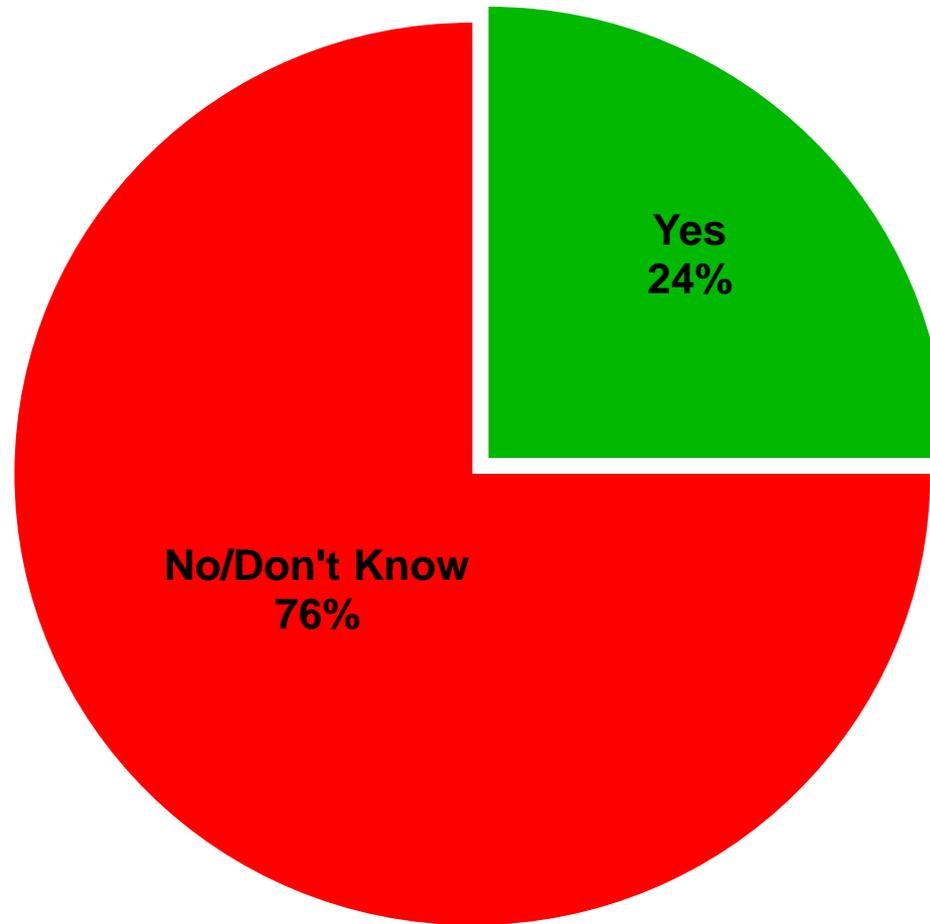


Capped/Prepaid Plan

- 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

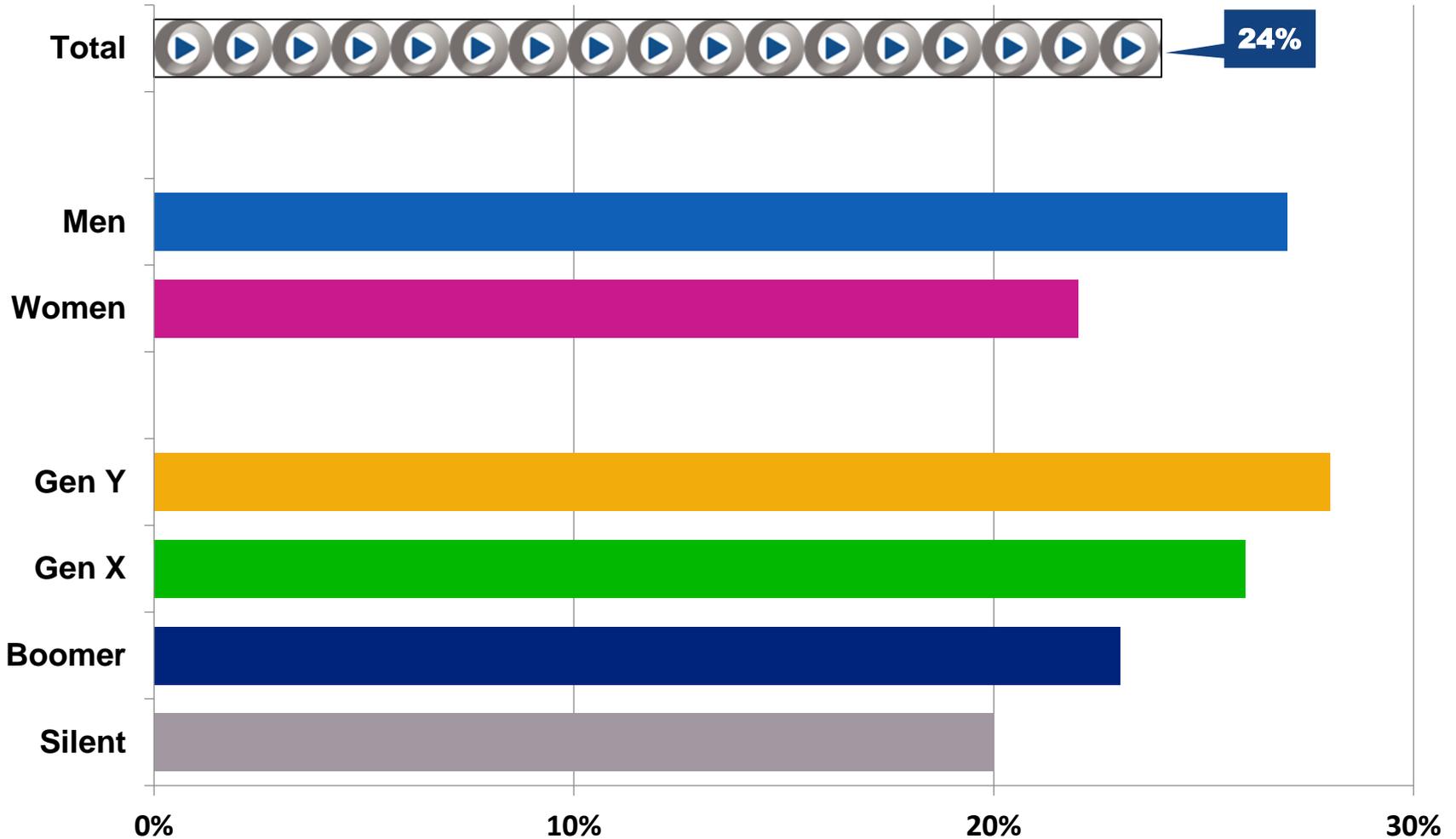
Among smartphone owners

One-fourth are aware of the FM Radio chip.



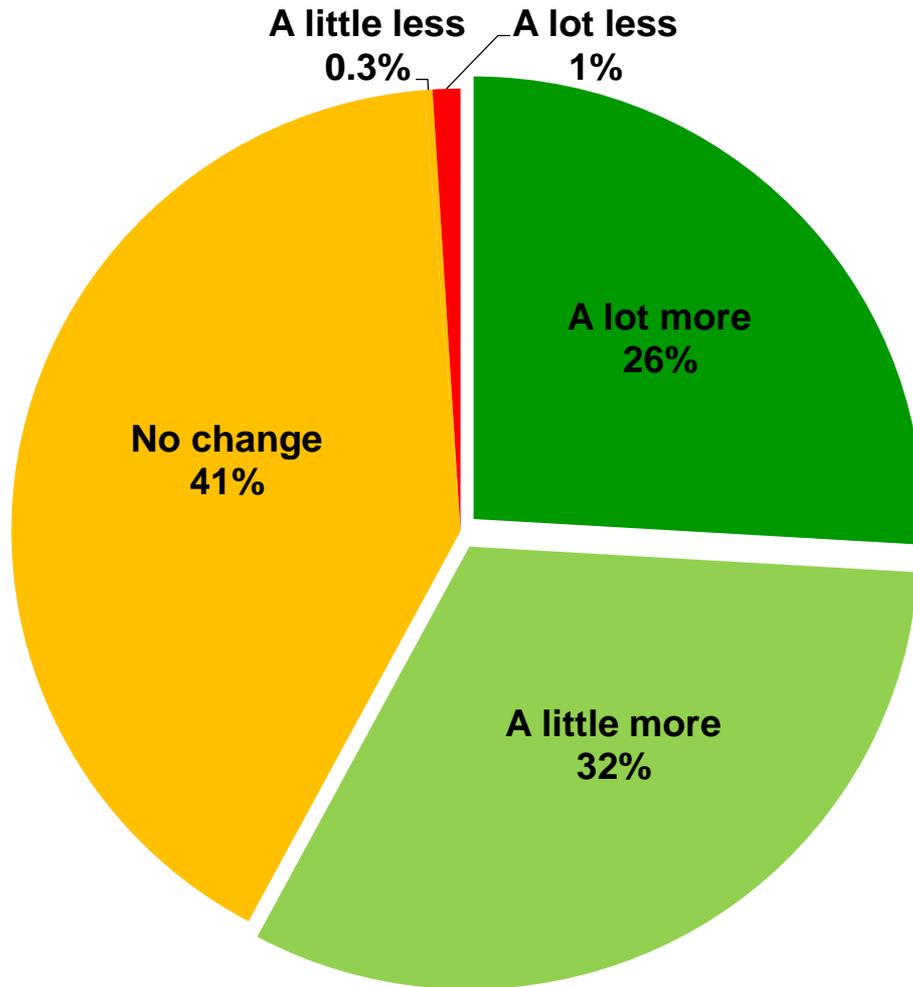
“Are you aware that an FM radio chip is built into smartphones, which if activated, would allow you to listen to local FM radio free of charge?”

Awareness Of FM Radio Chip

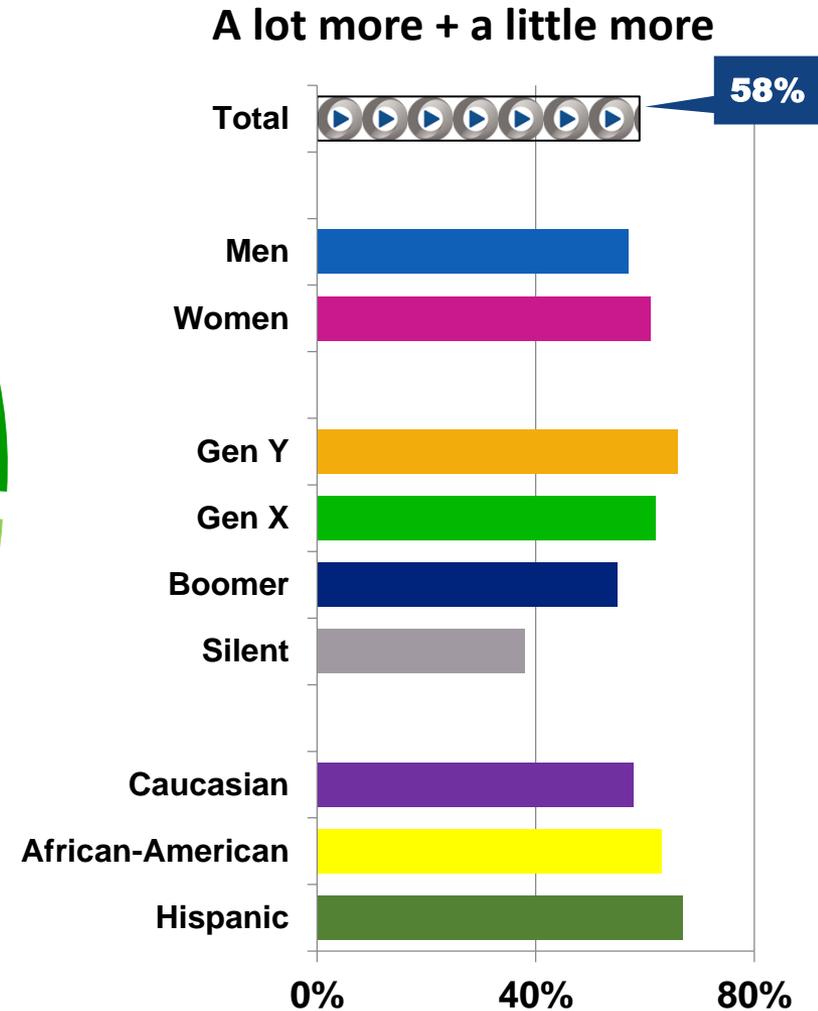


“Are you aware that an FM radio chip is built into smartphones, which if activated, would allow you to listen to local FM radio free of charge?”

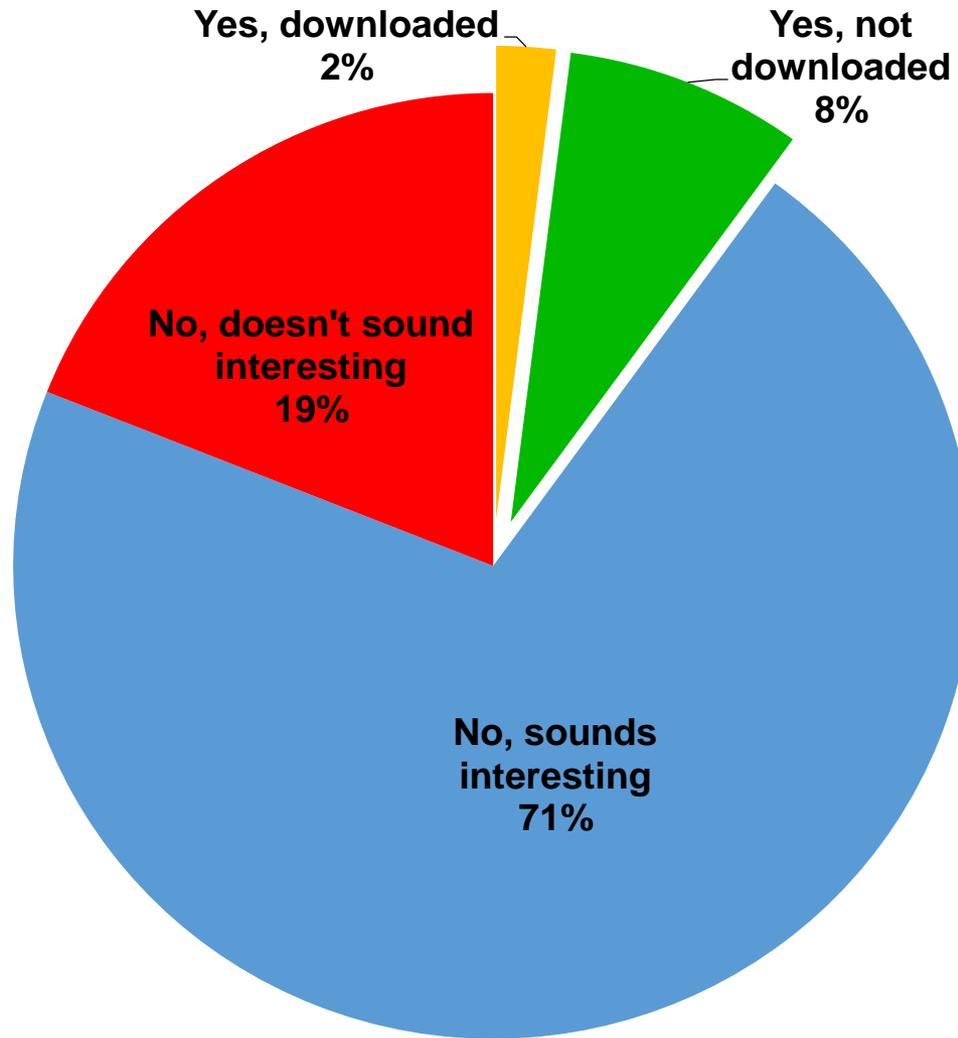
Nearly six in ten say an FM radio smartphone chip would lead to a little/lot more listening.



Among smartphone owners

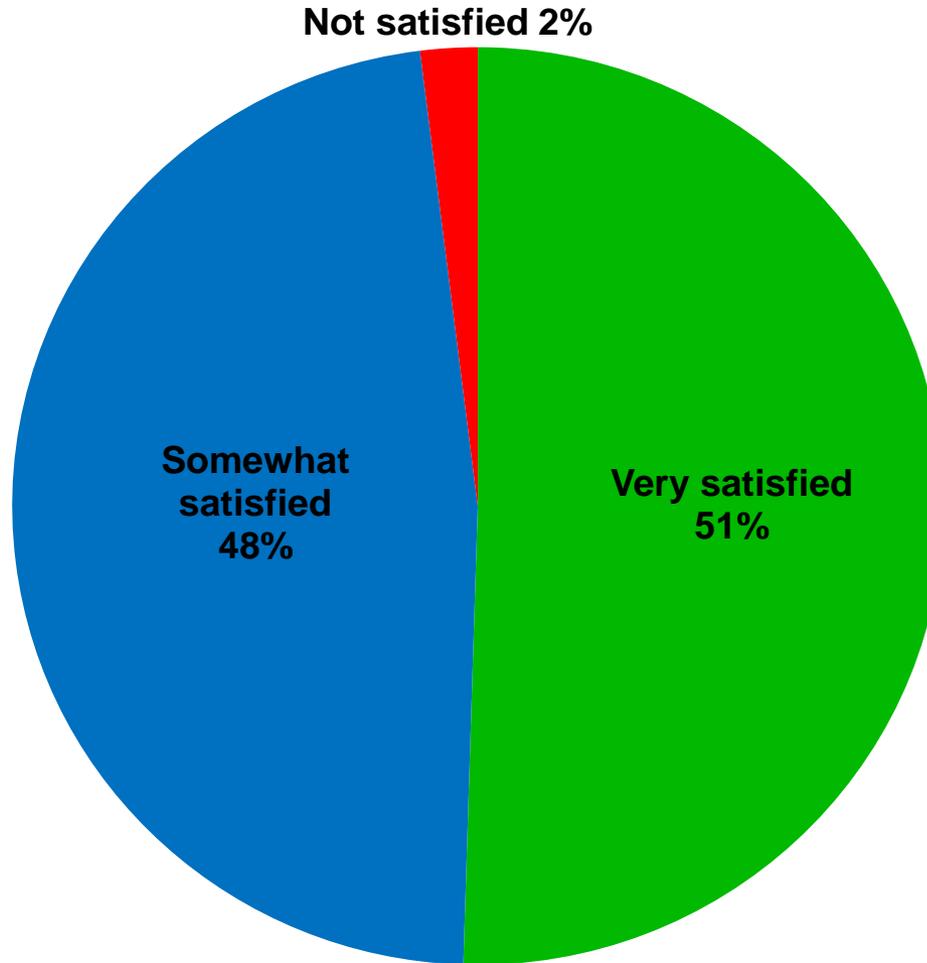


One in ten smartphone owners is aware of the NextRadio app.



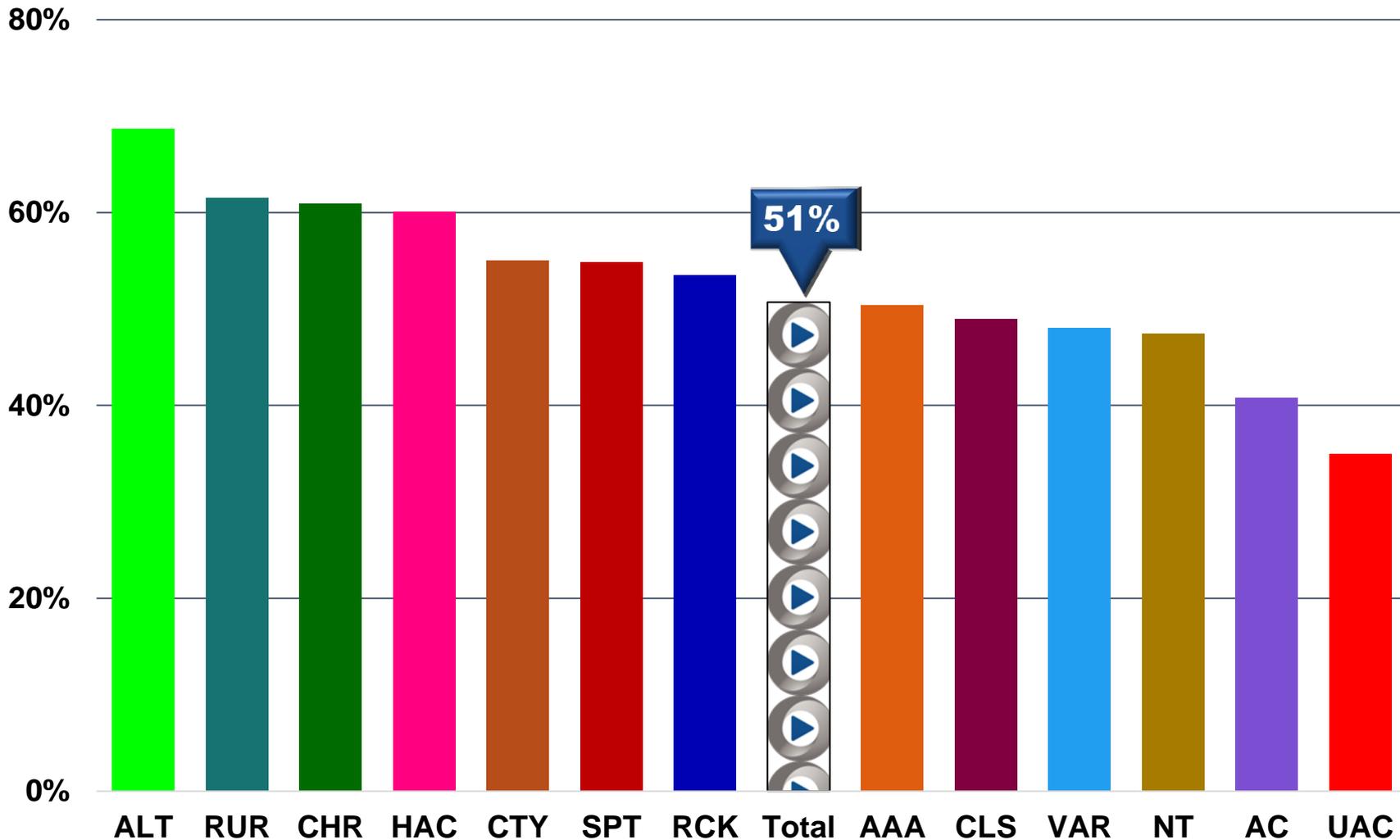
Among those who own a tablet or a smartphone

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



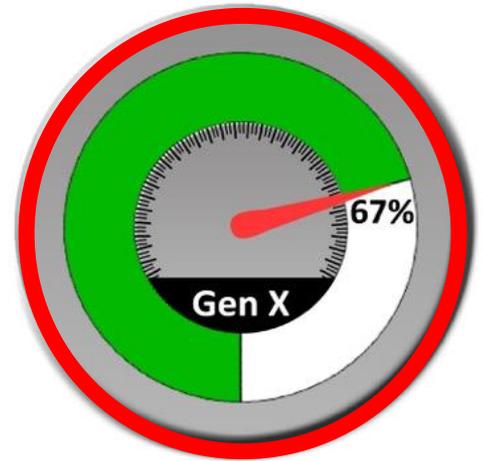
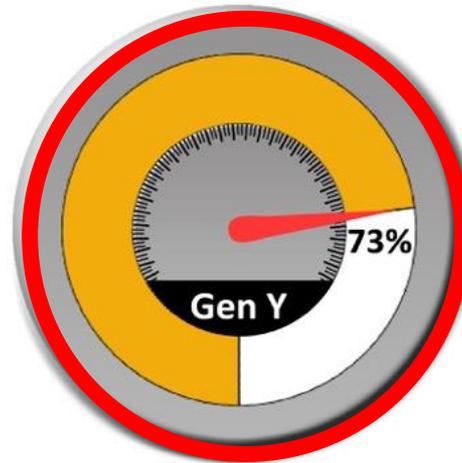
Among those who have downloaded the app and use it frequently or occasionally

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



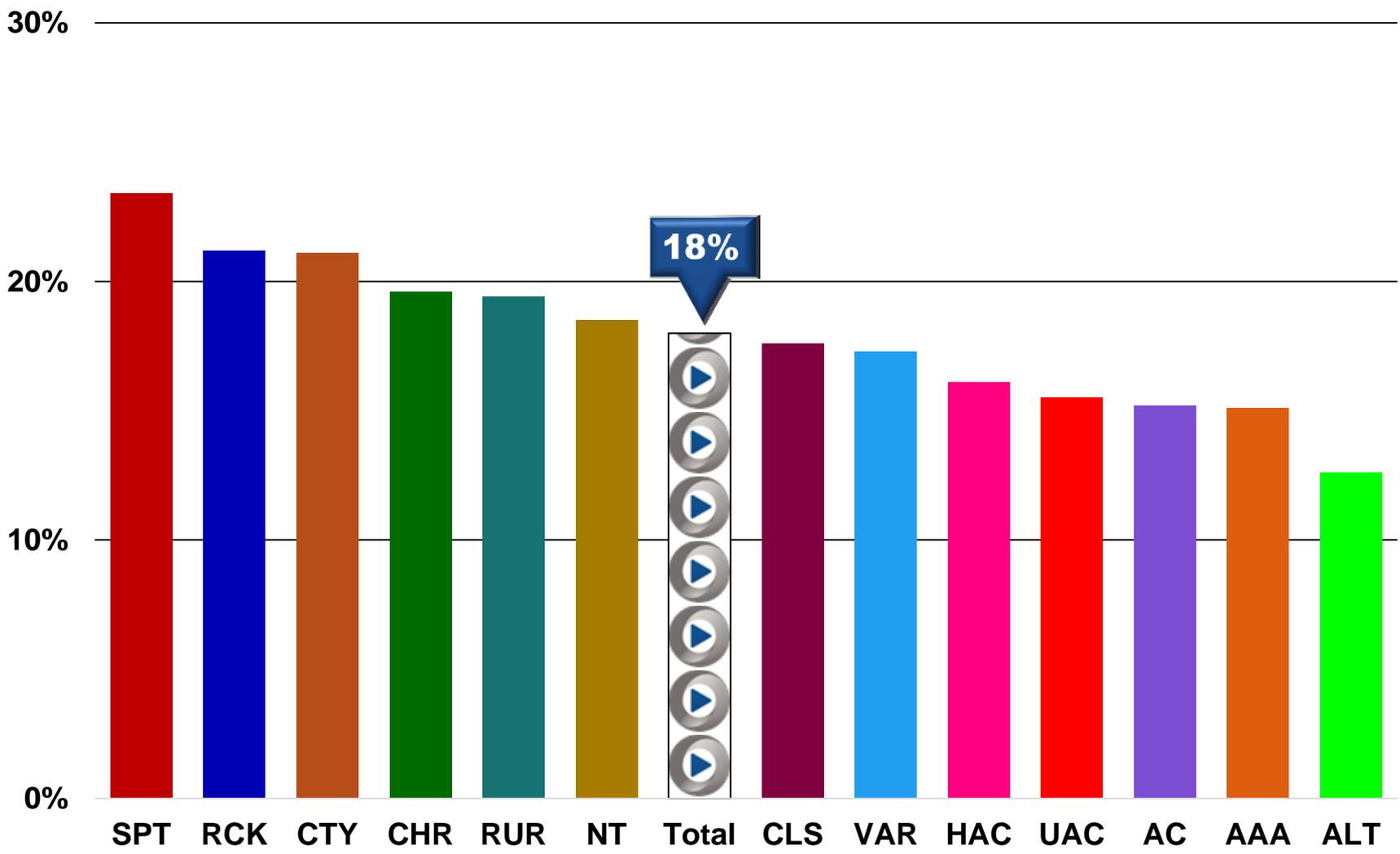
"100% of the time" or "Most of the time"

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



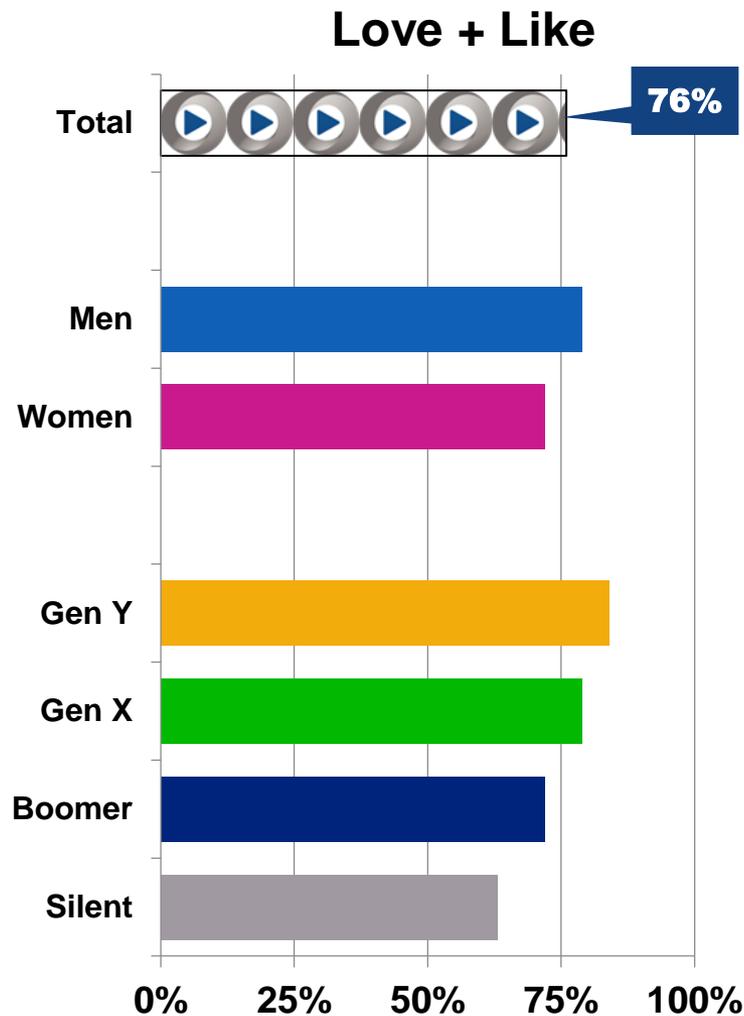
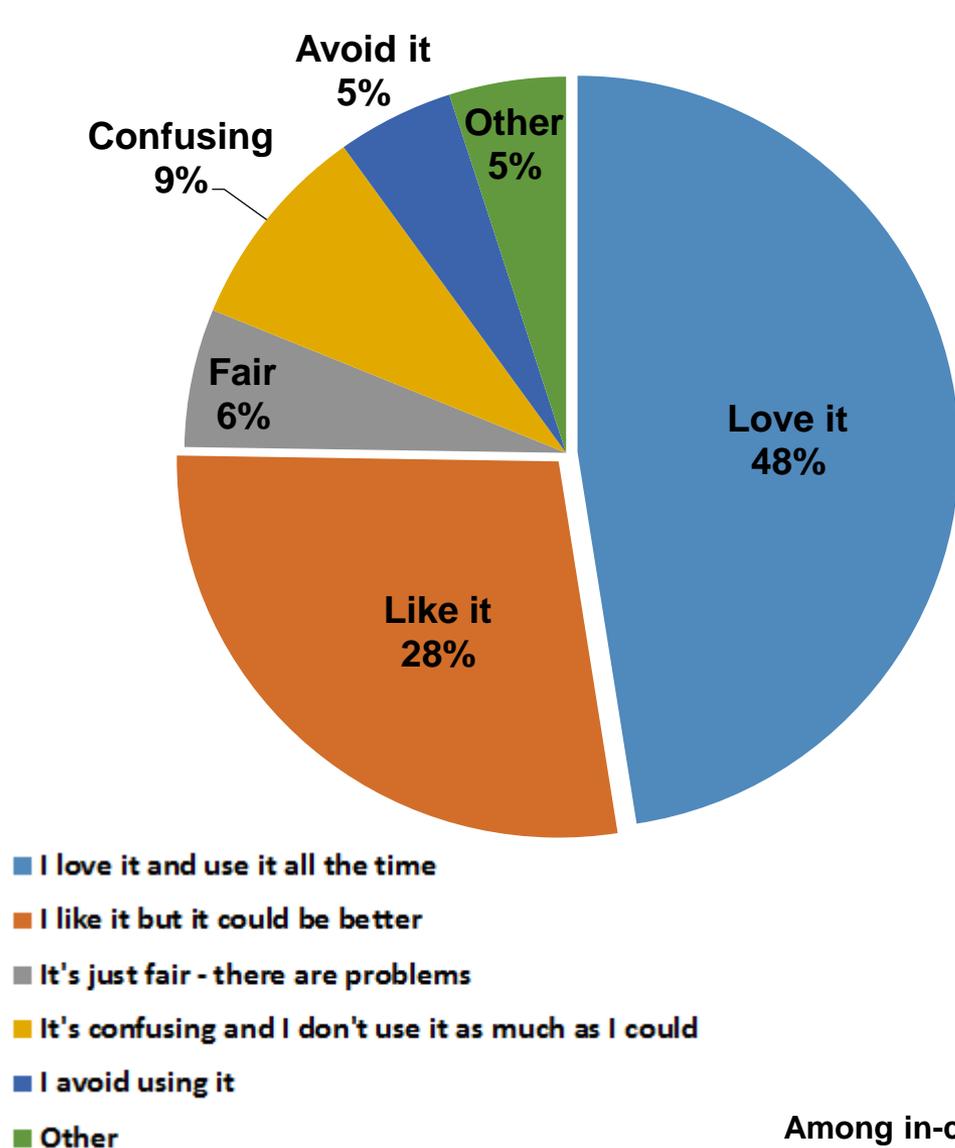
In the vehicle driven or ridden in most often

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.



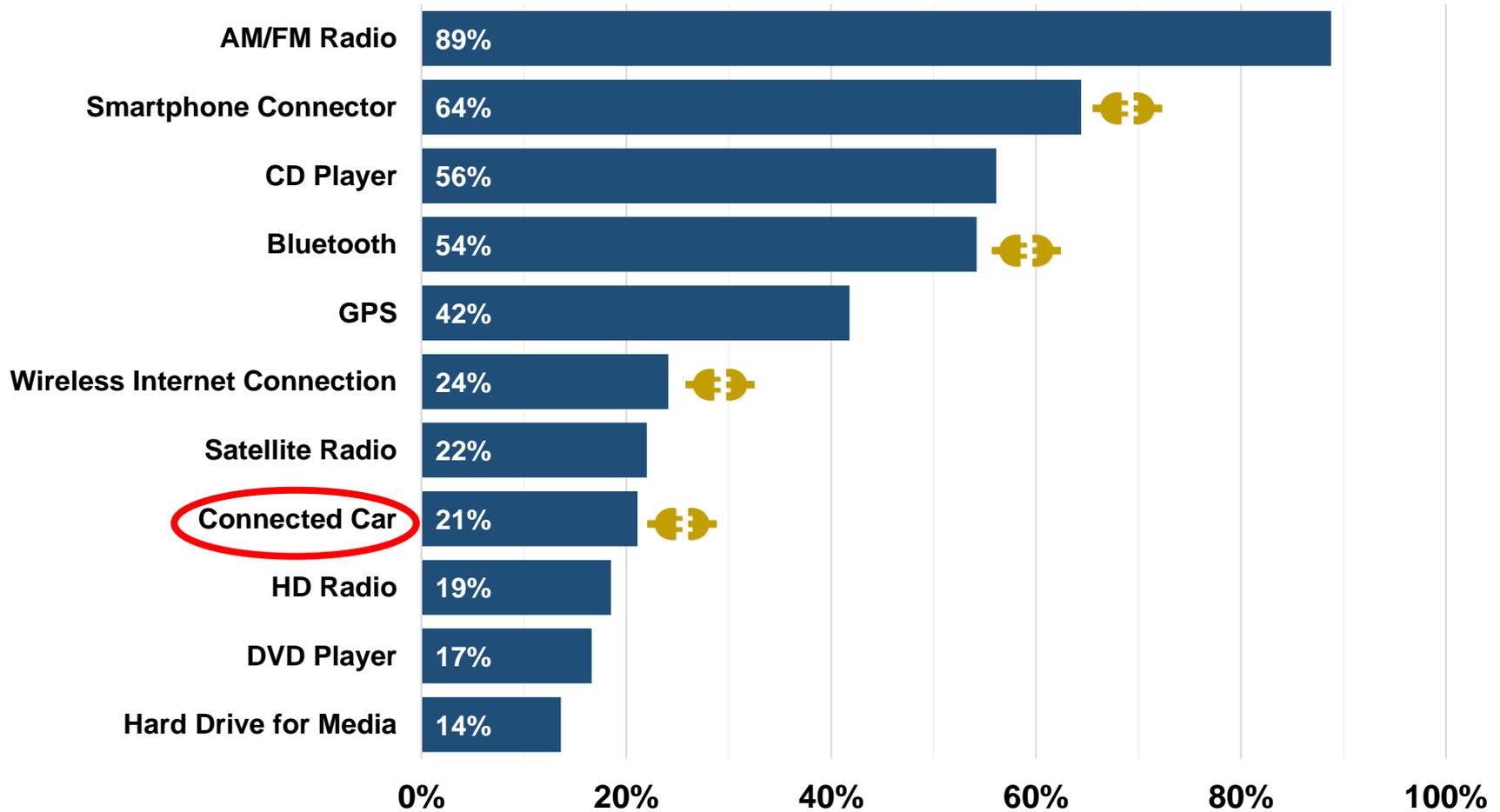
Among in-car media system owners

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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