

Jacobs12 TECH SURVEY



Our Changing Media Lives

Methodology

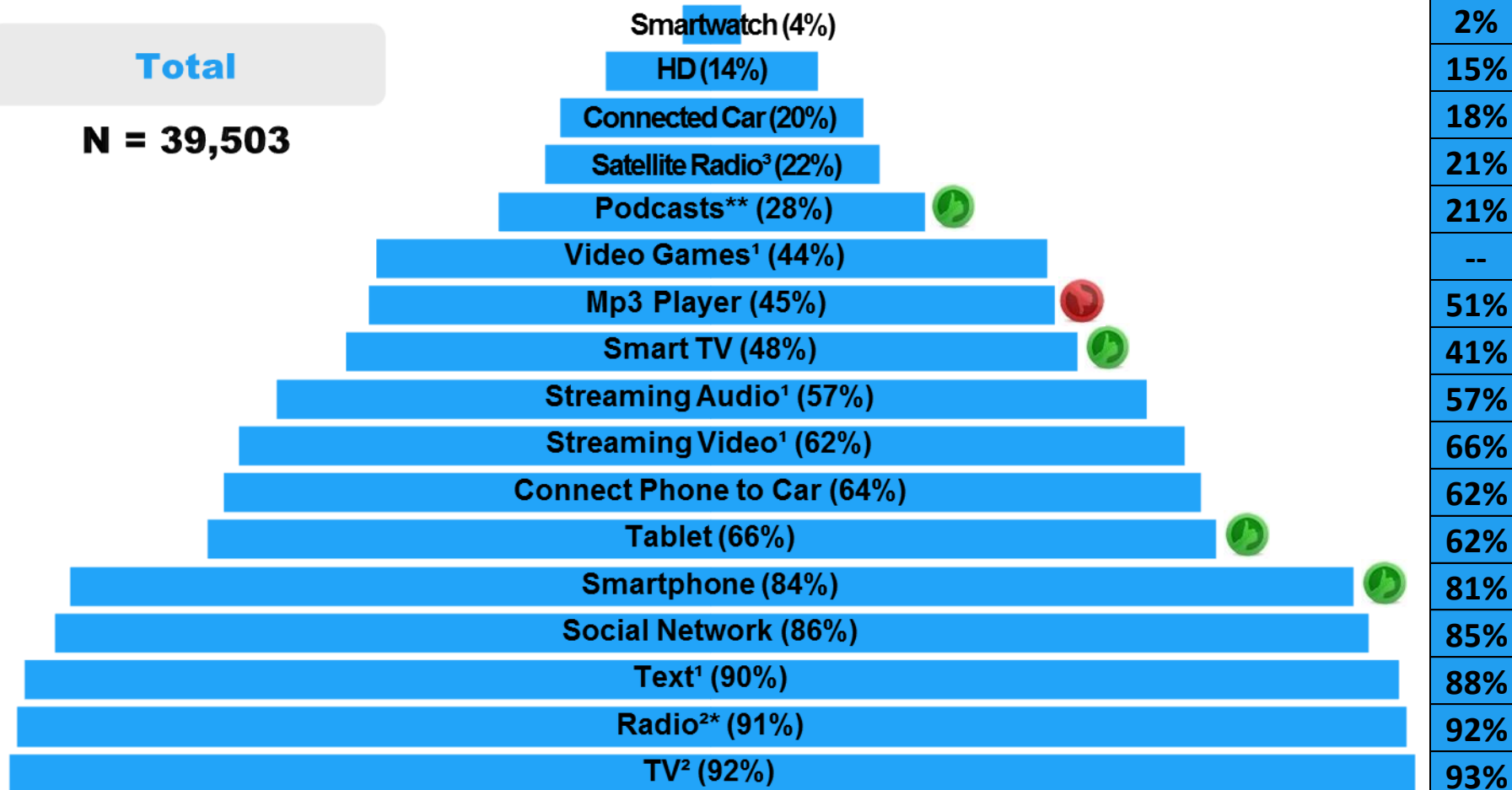
- 245 radio stations in the U.S. & Canada
- N = 39,503
- Interview dates: January 19 – February 22, 2016
- Most respondents are members of station email databases. Some responses were gathered via station websites and/or social networking pages.
- All responses were collected online and weighted using metro population data.
- This is a web survey & does not represent all radio listeners or even each station's audience. Because it's an opt-in survey, no margin of error is calculated.



Media Usage Pyramid 2016

Total

N = 39,503



¹ Weekly or more ² 1+ hour per day ³ Paid & trial users ^{**} Monthly or more ^{*} Any Platform/Device



Brand Platform Pyramid 2016

Total

N = 39,503

Google Play Music (6%) \$

TuneIn (7%)

Hulu (8%) \$

Spotify (11%) \$

Amazon Prime (14%) \$

Pinterest (17%)

LinkedIn (17%)

iHeartRadio (18%)

Twitter (20%)

Instagram (21%)

SiriusXM³ (22%) \$

Pandora^{**} (28%)

Netflix (35%) \$

Home Station Stream (43%)

YouTube (50%)

Facebook (73%)

Radio^{2*} (91%)

Total
2015

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10%

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16%

20%

18%

19%

18%

21%

30%

34%

34%

53%

71%

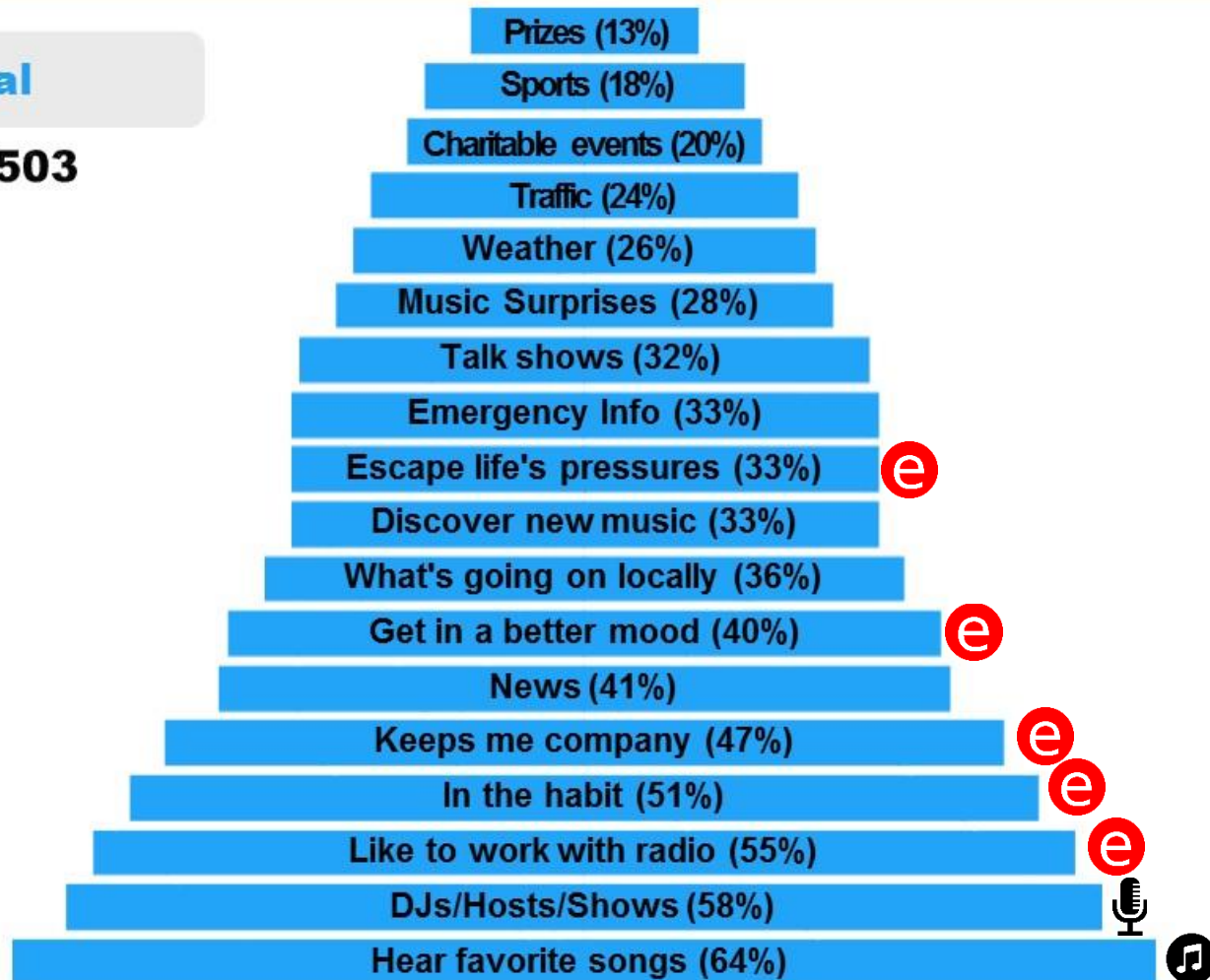
92%

All based on weekly use unless otherwise noted ² 1+ hour per day ³ Paid & trial users ^{**} Excluding Canada ^{*} Any Platform/Device

Why radio? Great music, compelling personalities, & powerful “emotional benefits.”

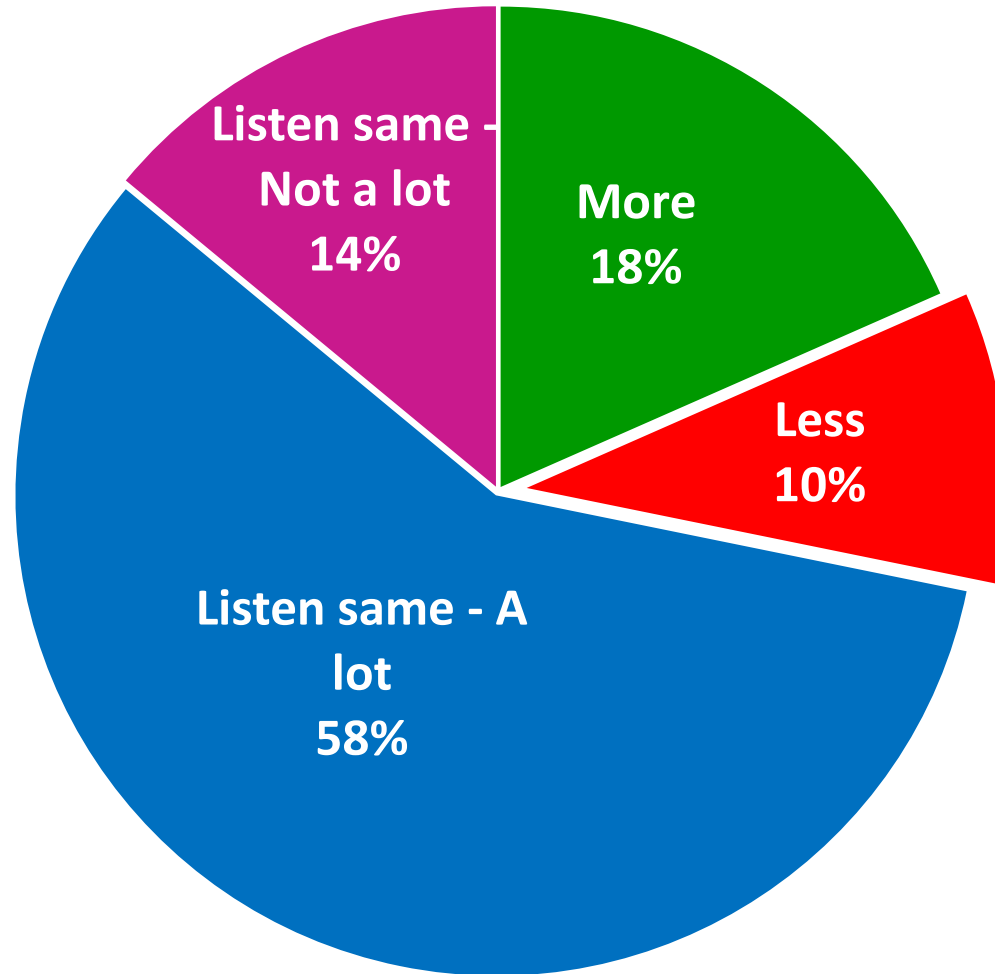
Total

N = 39,503



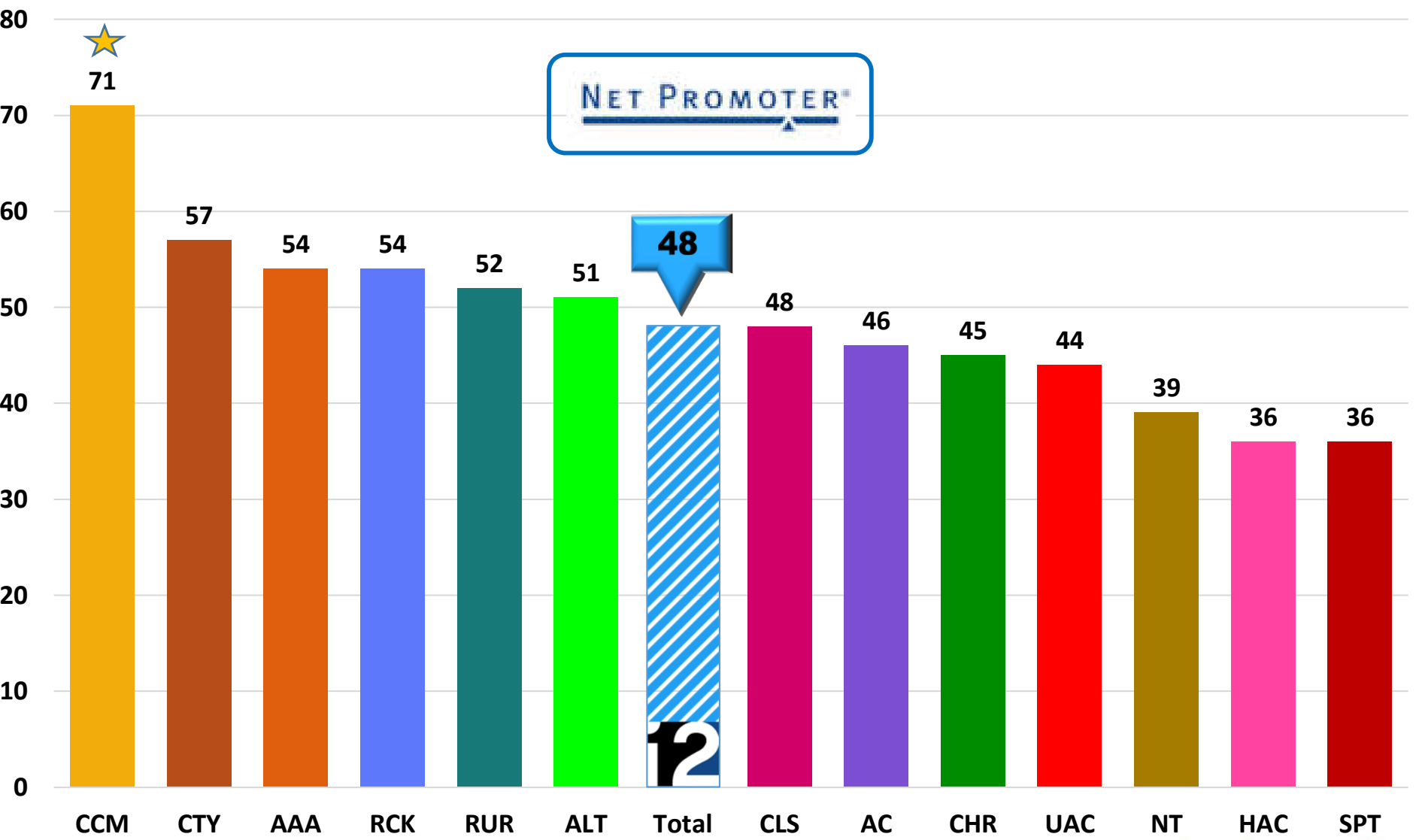
Main Reason

By nearly a 2:1 margin, AM/FM radio has momentum. Only 1 in 10 listens less

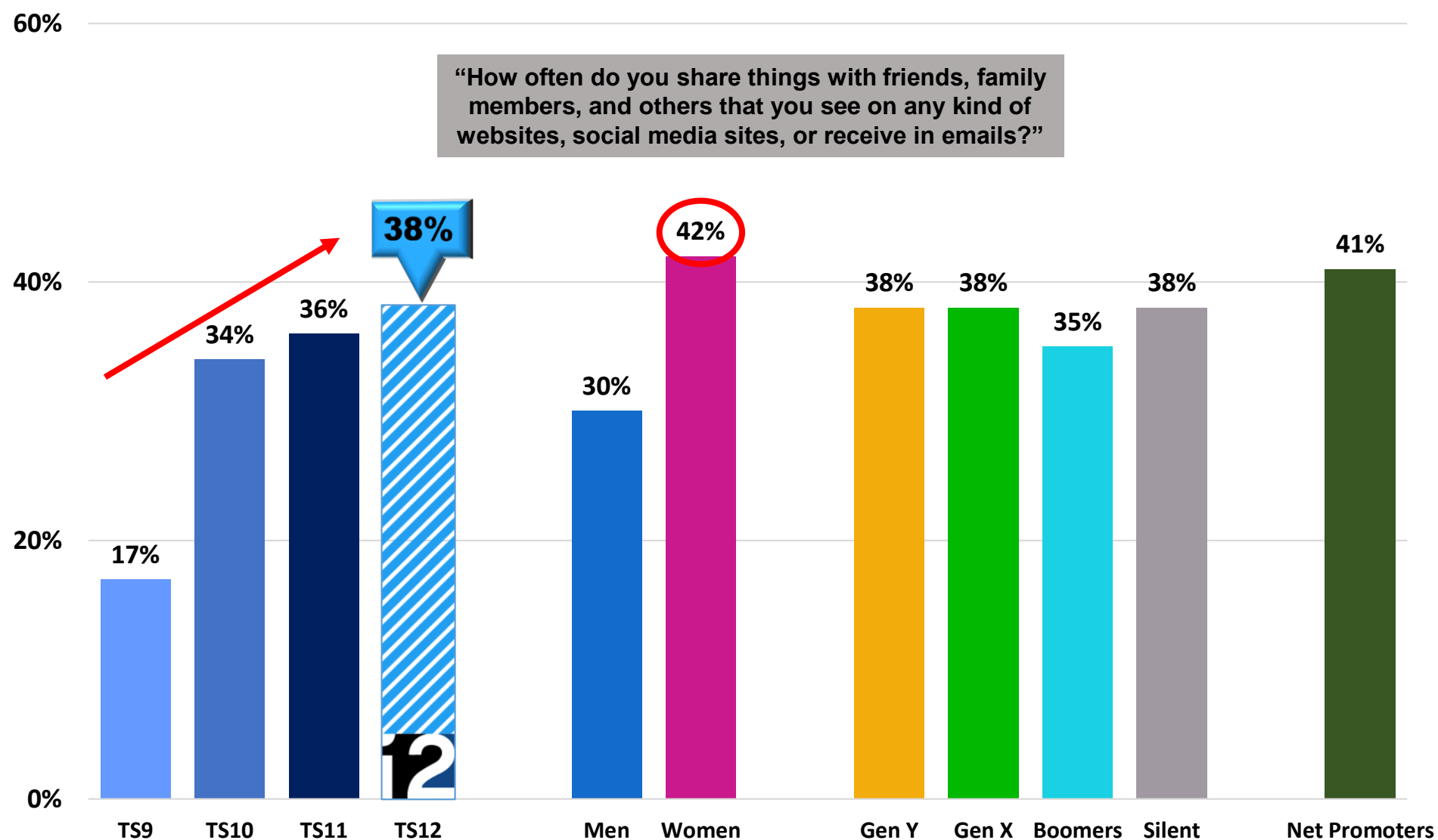


Past Year

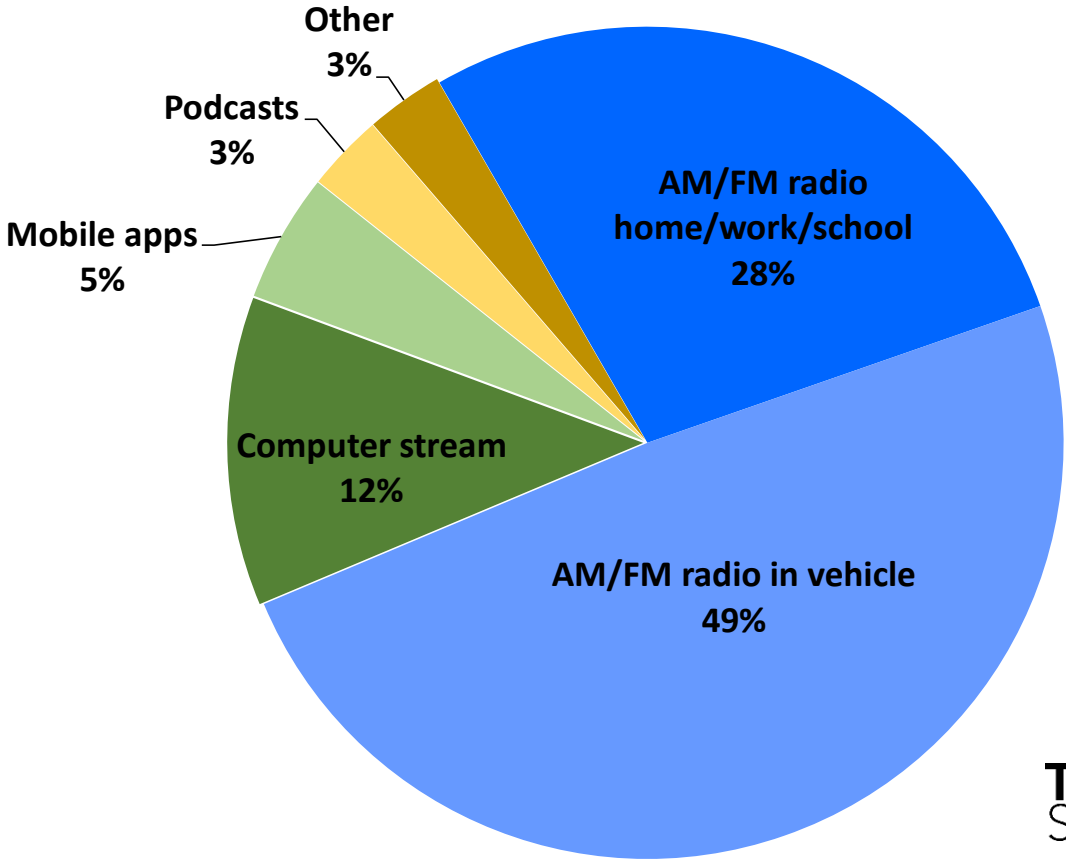
Best “recommendation” scores: Christian, Classic Rock/Hits, Triple A, Mainstream Rock



Frequent sharing is on the rise, especially among women & Net Promoters.



20% of total radio station usage now occurs digitally – up from TS11’s digital percentage.

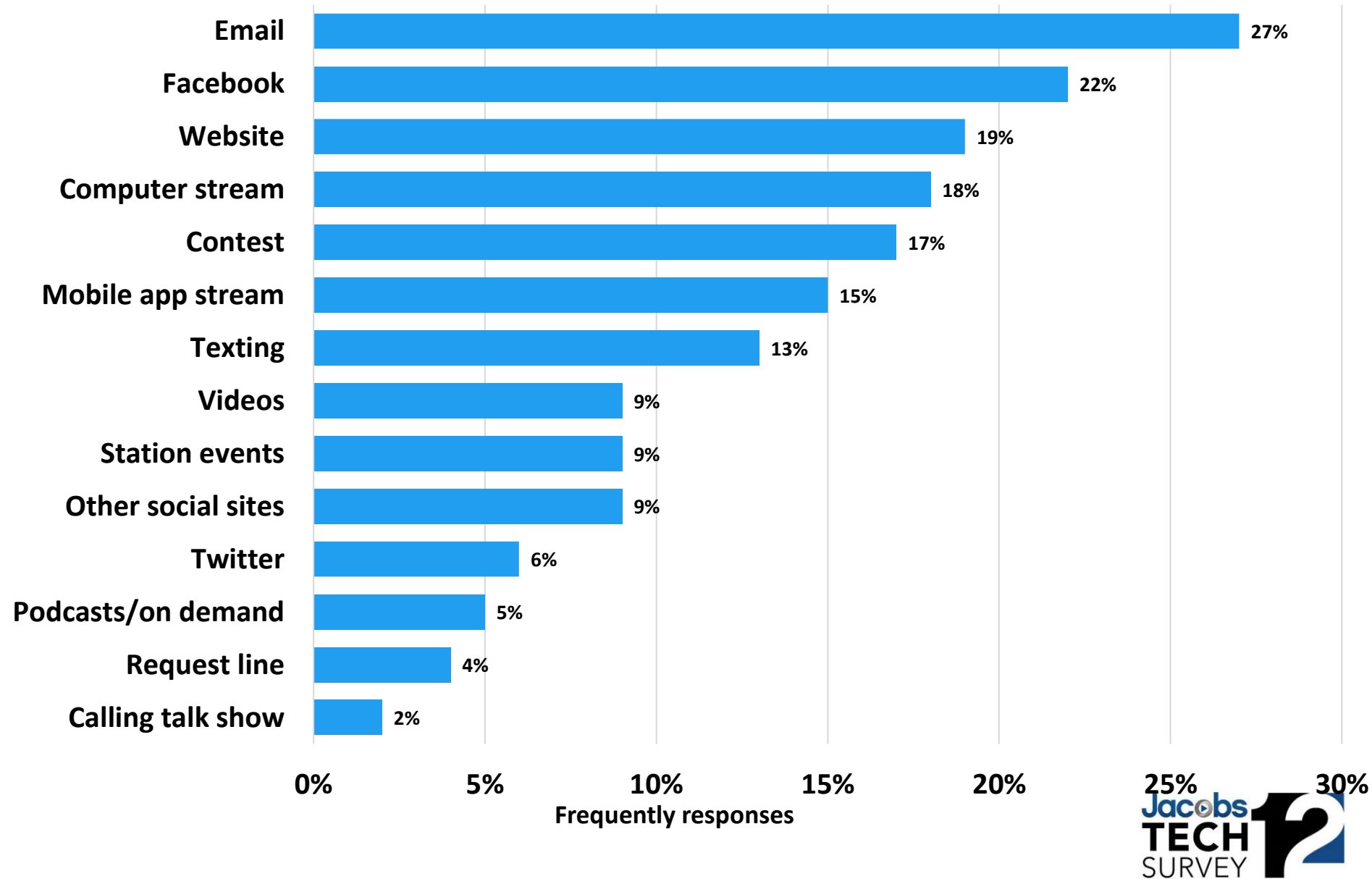


Traditional – 77%
Digital – 20%

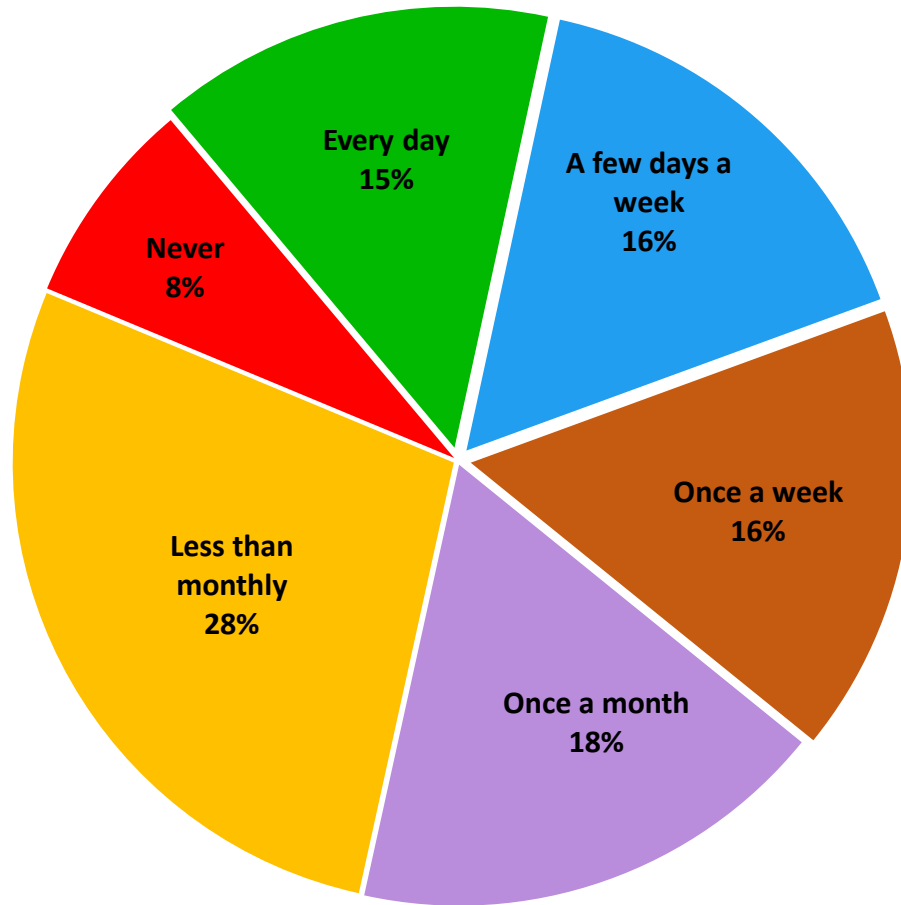


Traditional – 81%
Digital – 17%

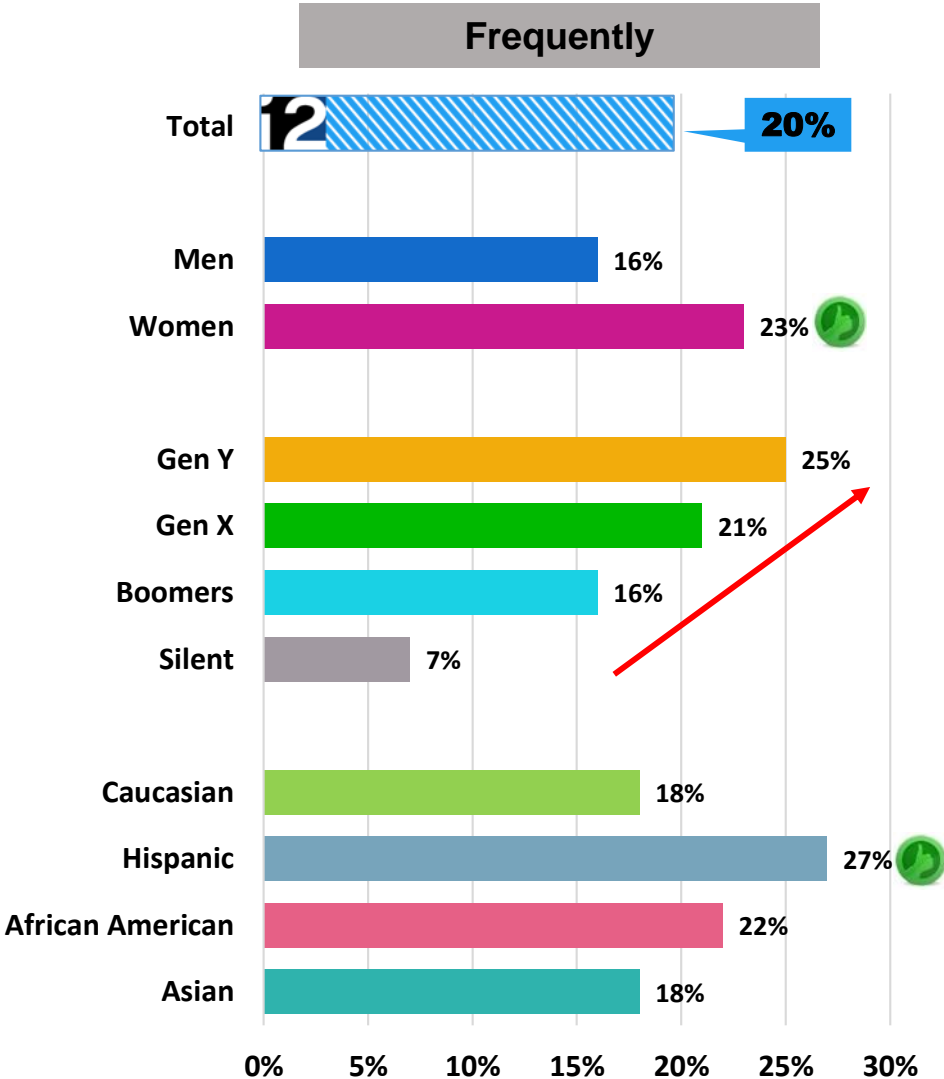
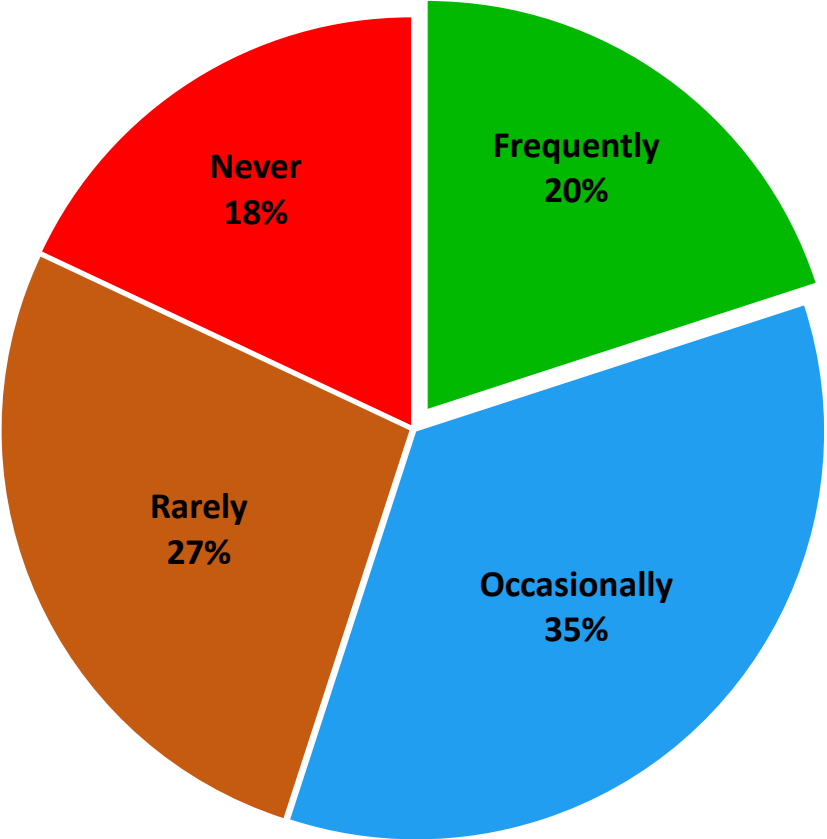
Fans interact most with their P1 stations via email, followed by Facebook.



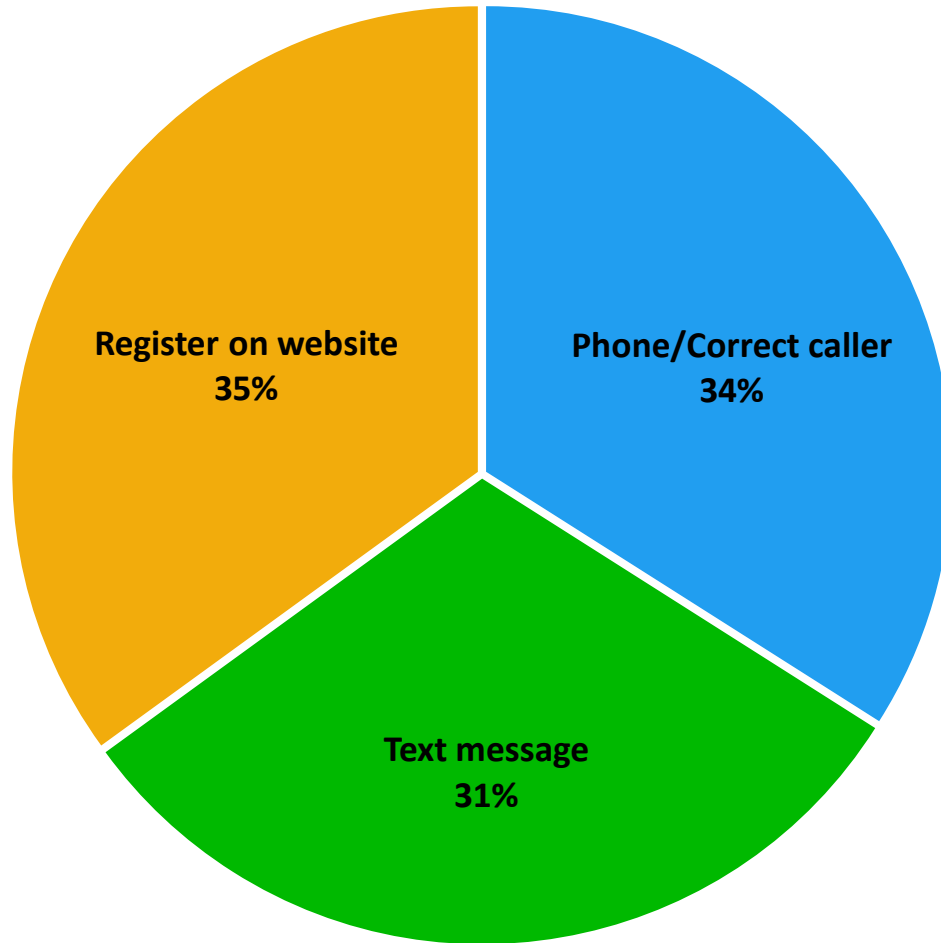
Nearly half visit station websites at least weekly; 15% stop by every day.



One-fifth play radio contests frequently – especially women, Millennials, & Hispanics.

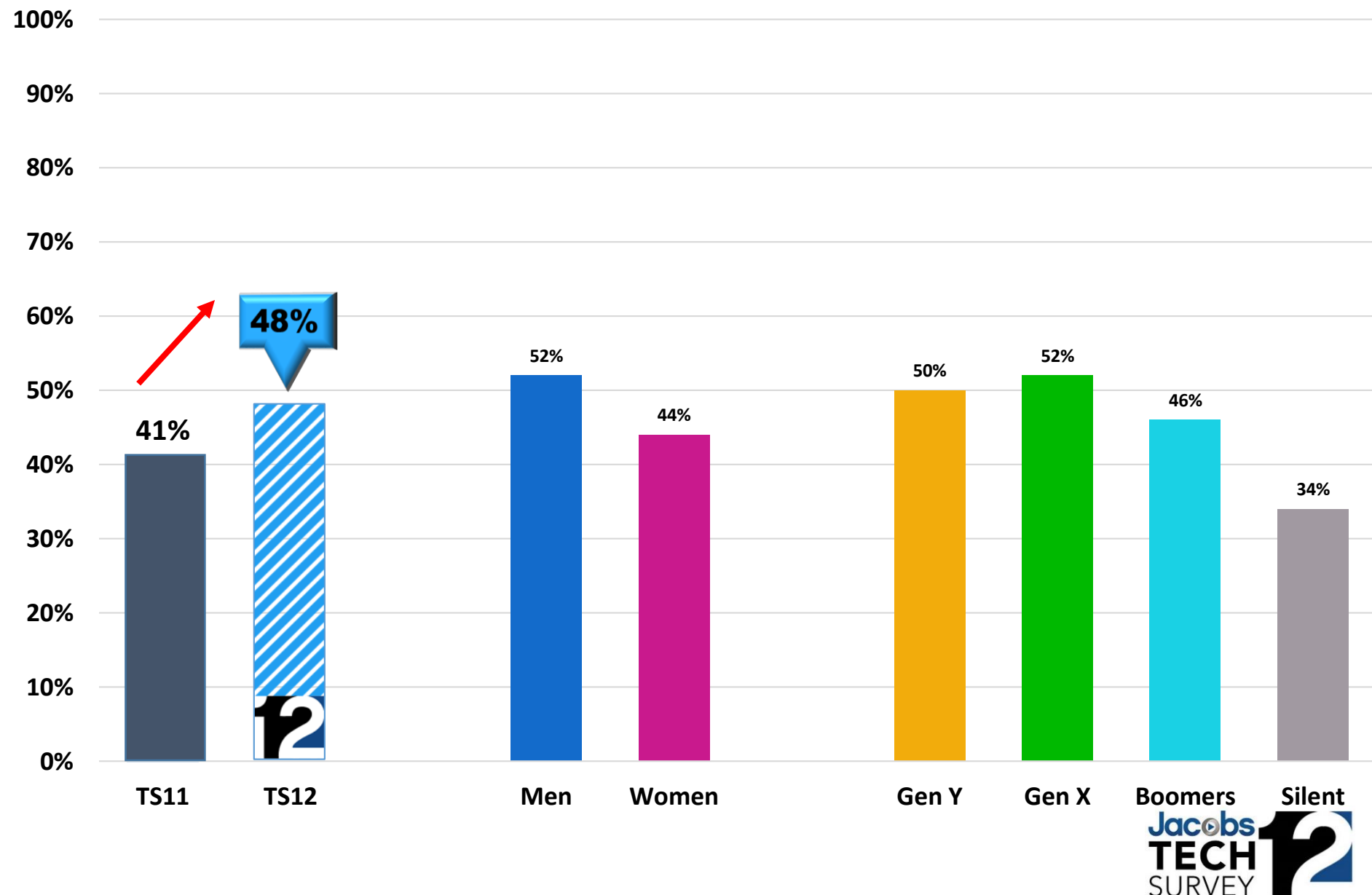


And for preferred contest methodology, a nearly 3-way tie between text, website registration, & call-in-to-win.

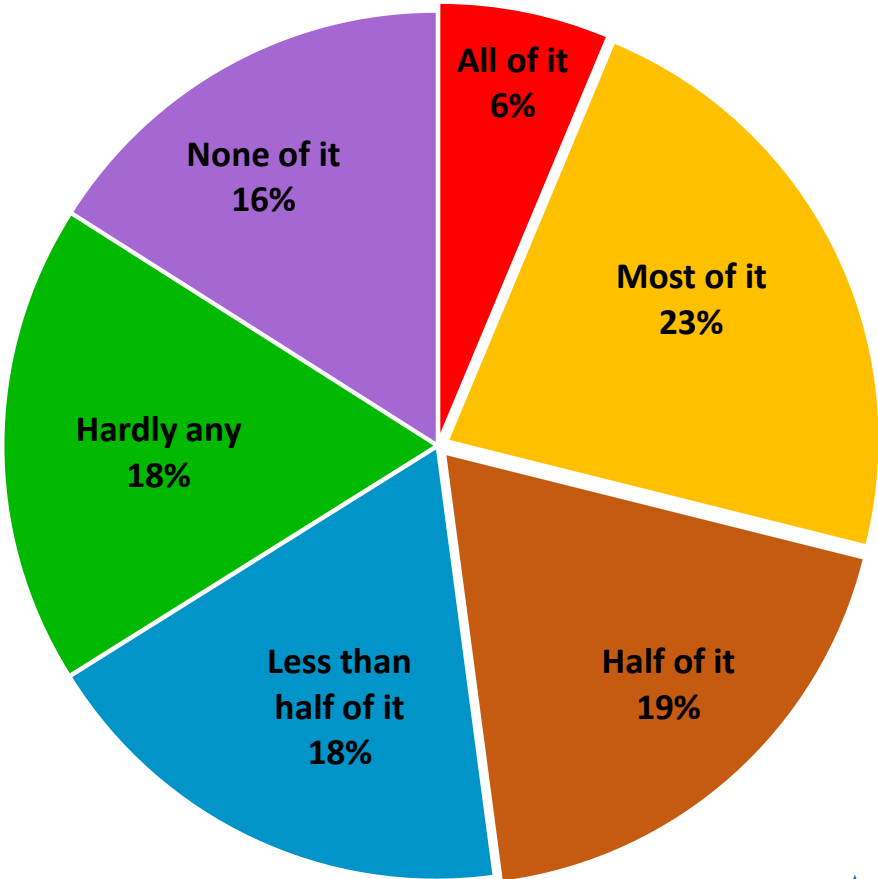


Among those who participate frequently or occasionally in radio contests

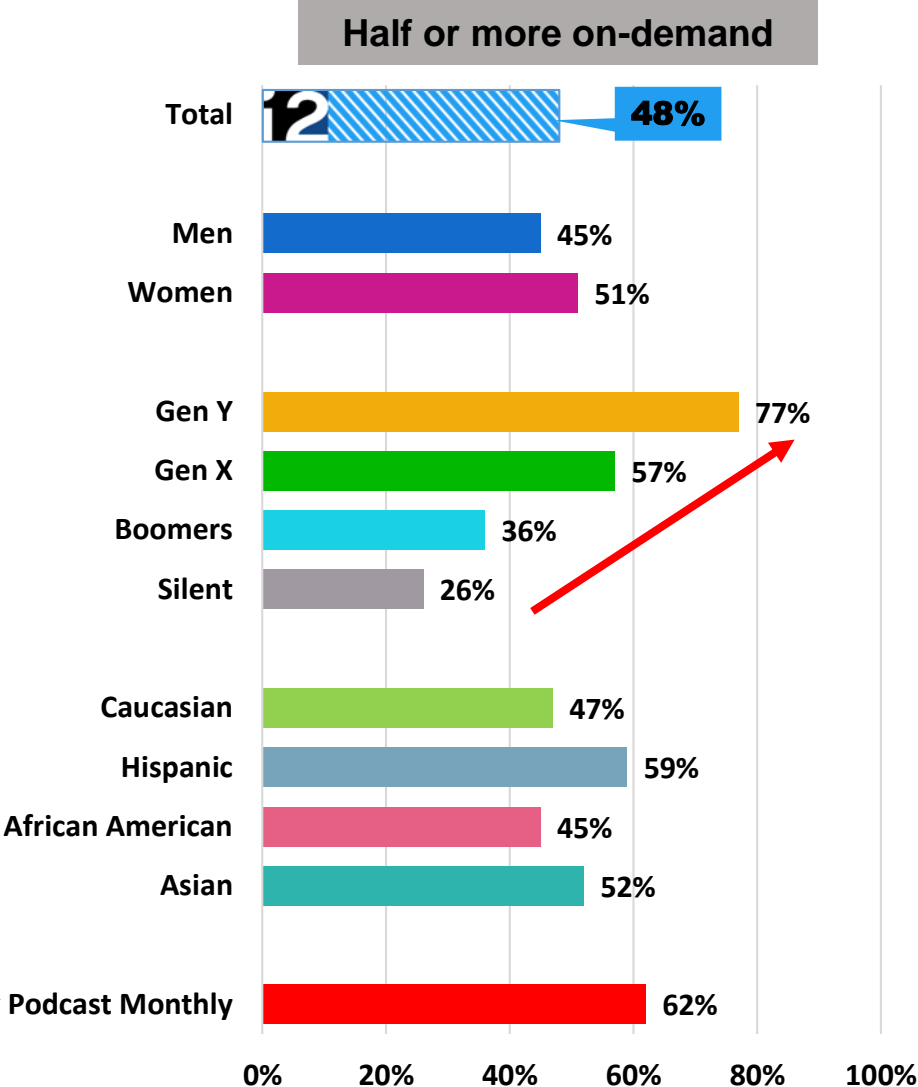
Nearly half now own a “connected” TV, especially men & Generations Y & X.



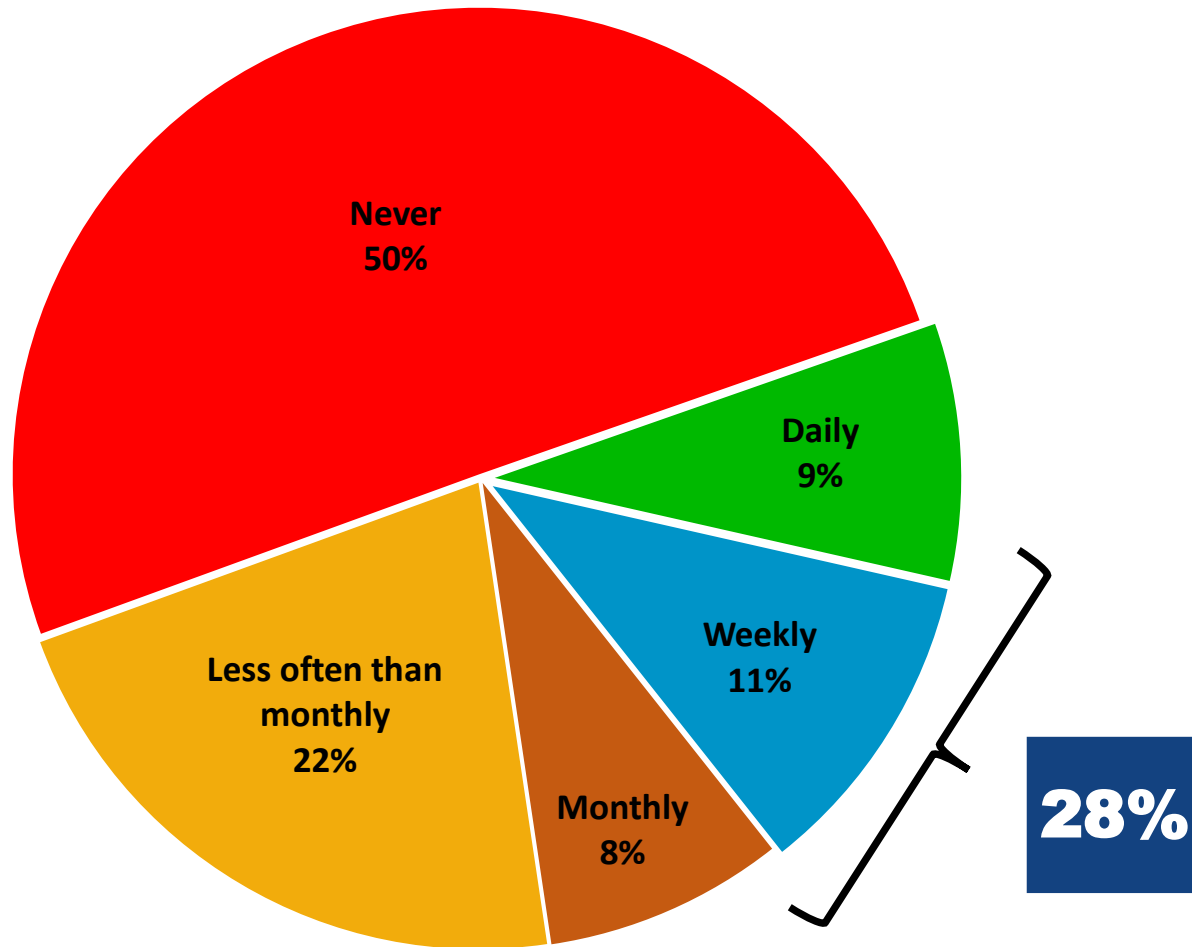
On-demand TV viewing is big, especially among progressively younger generations.



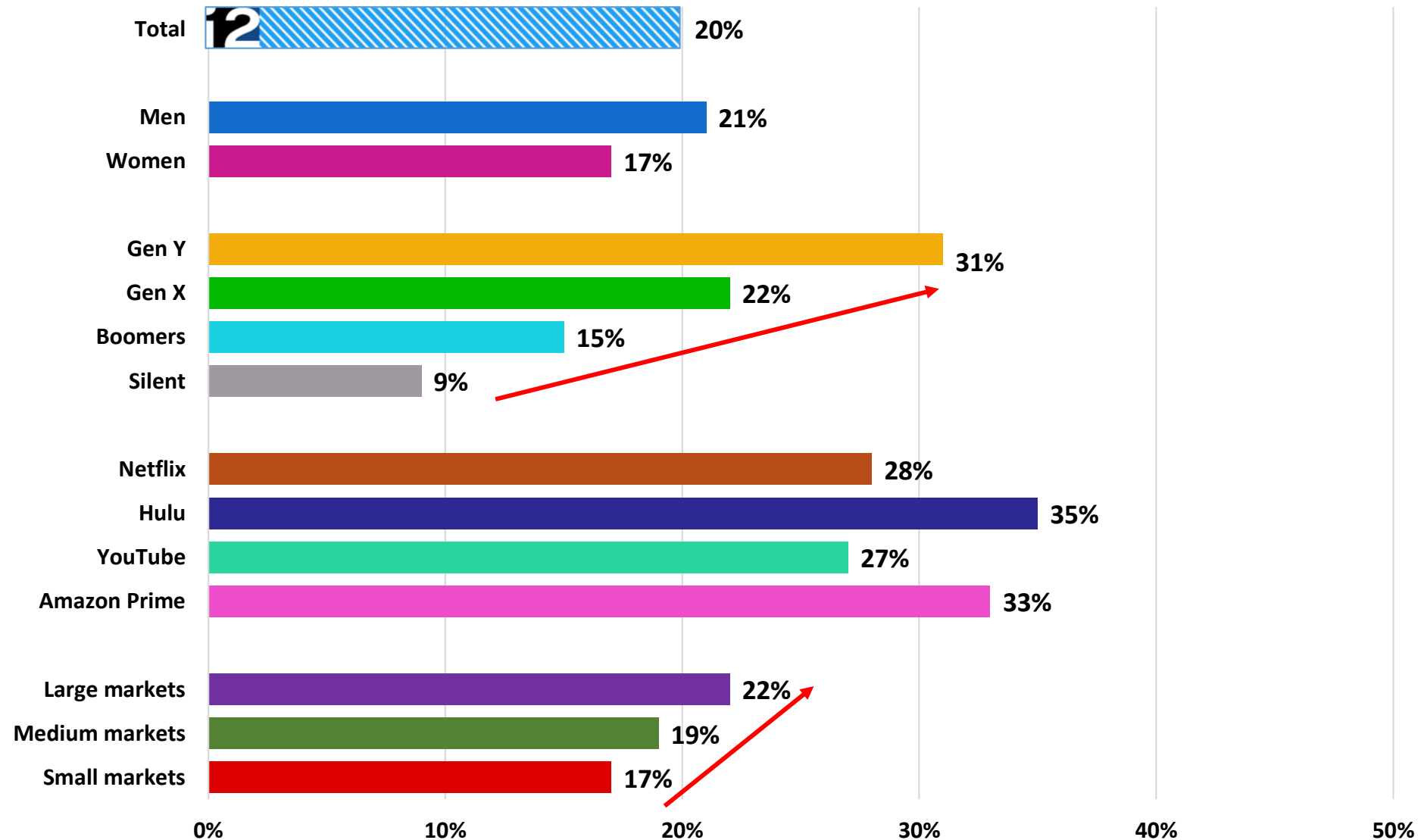
Among those who watch TV via DVR/On-demand



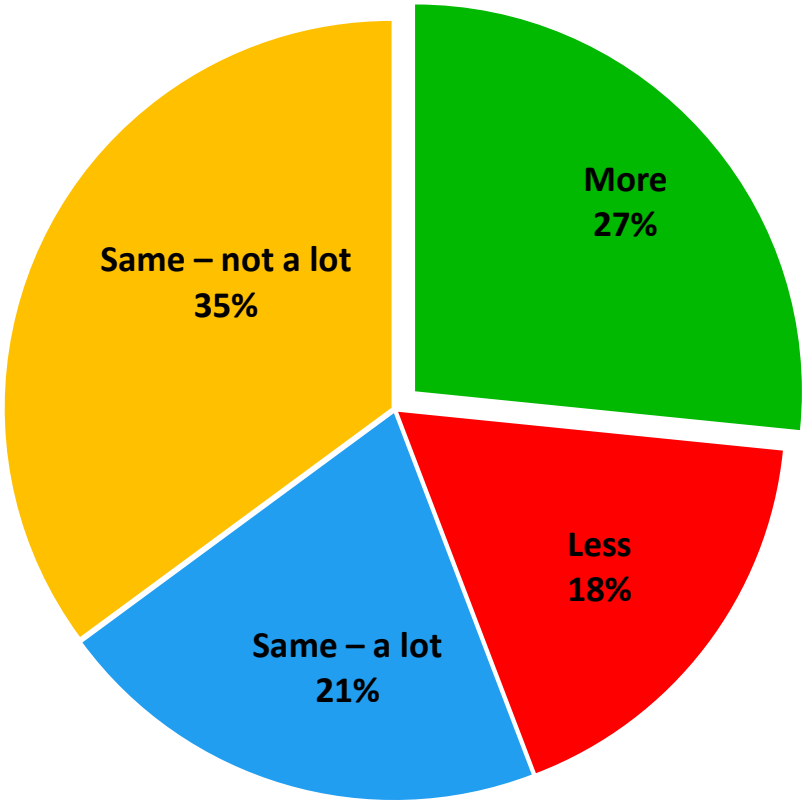
Nearly three in ten listen to podcasts or on-demand audio weekly or more often.



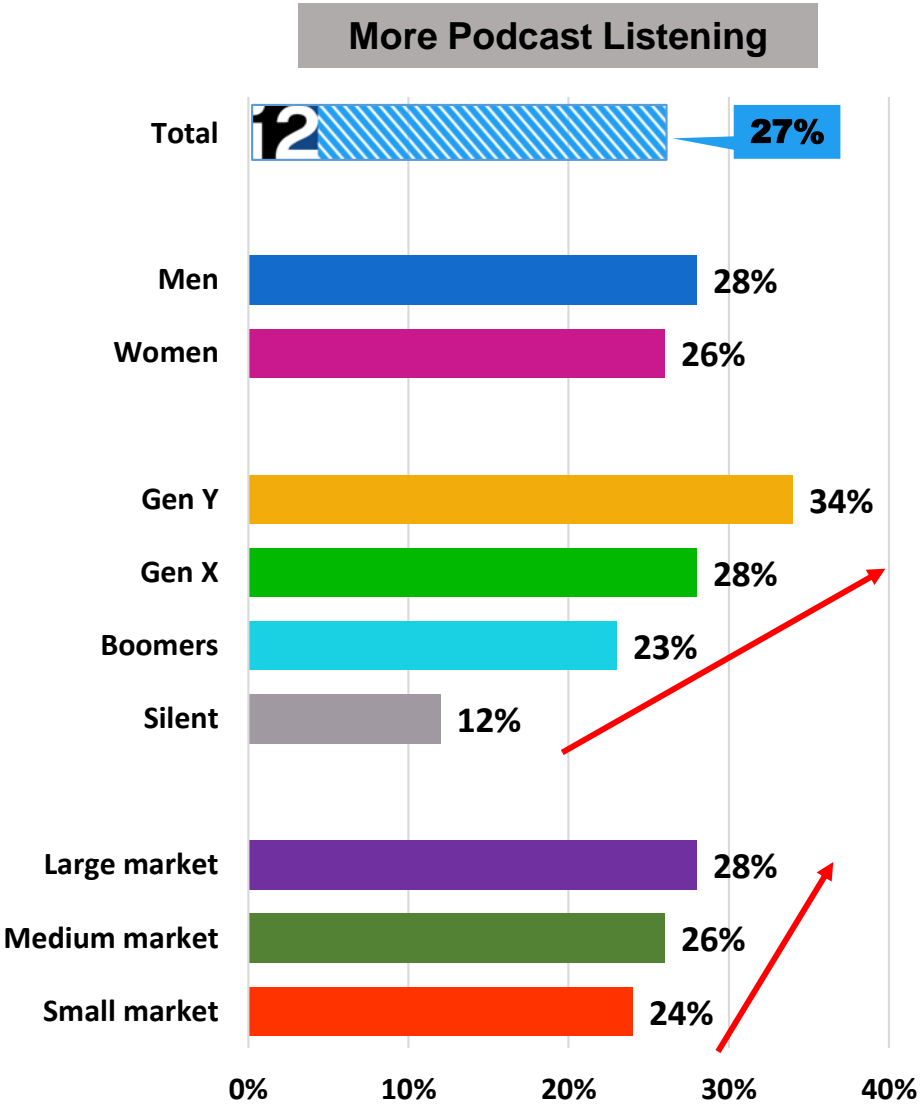
Weekly podcast fans lean male, young, & subscribe to video streaming sites like Hulu.



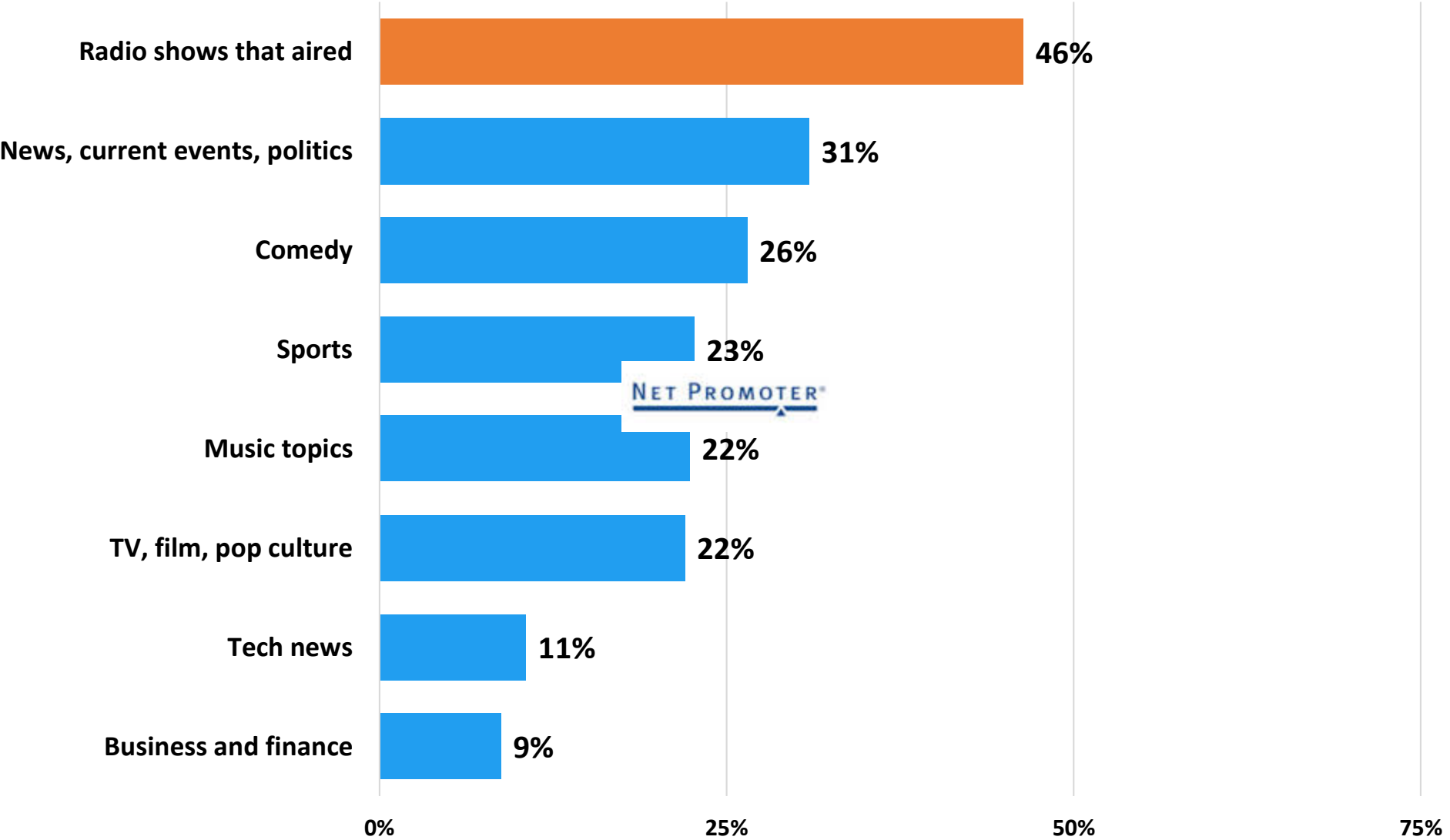
Podcasting has momentum, especially with Millennials & those who live in larger markets.



Among those who listen to podcasts monthly or more
Past year

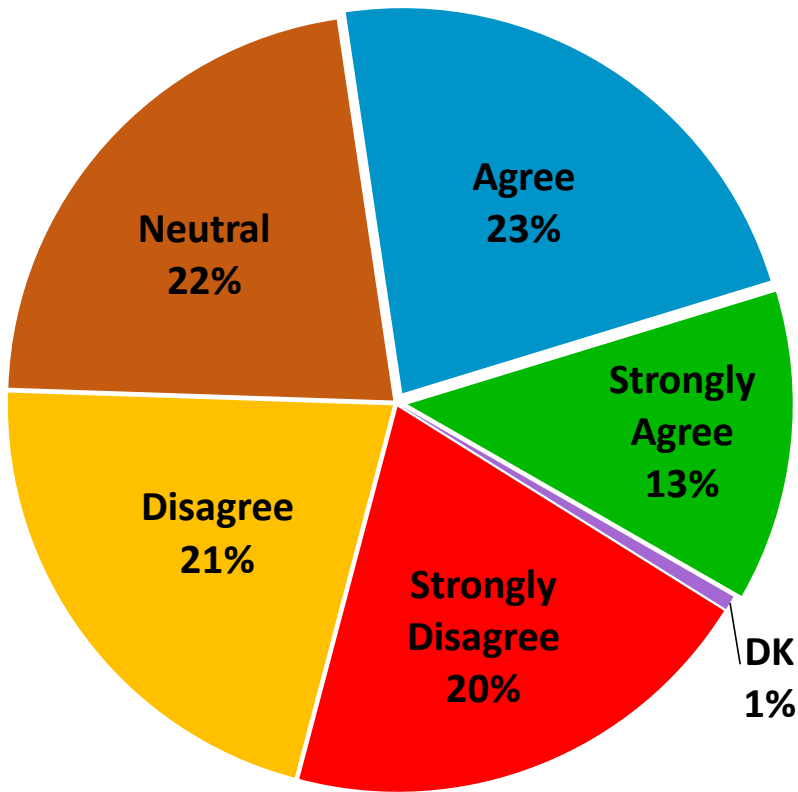


Beside listening to shows that have already aired, podcast user like news & comedy.



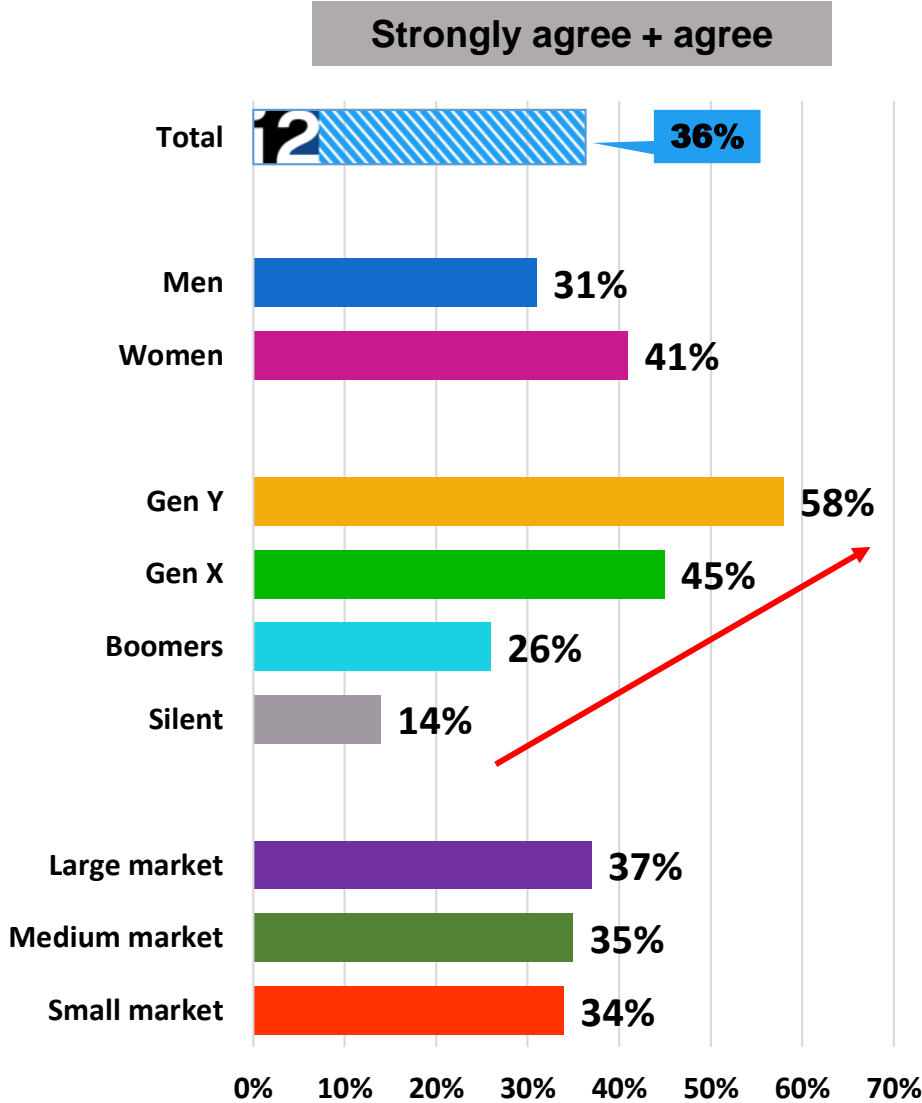
Among those who listen to podcasts monthly or more
Podcasts listened to regularly, multiple responses allowed

More than one-third are addicted to their mobile phones – especially women & Millennials.

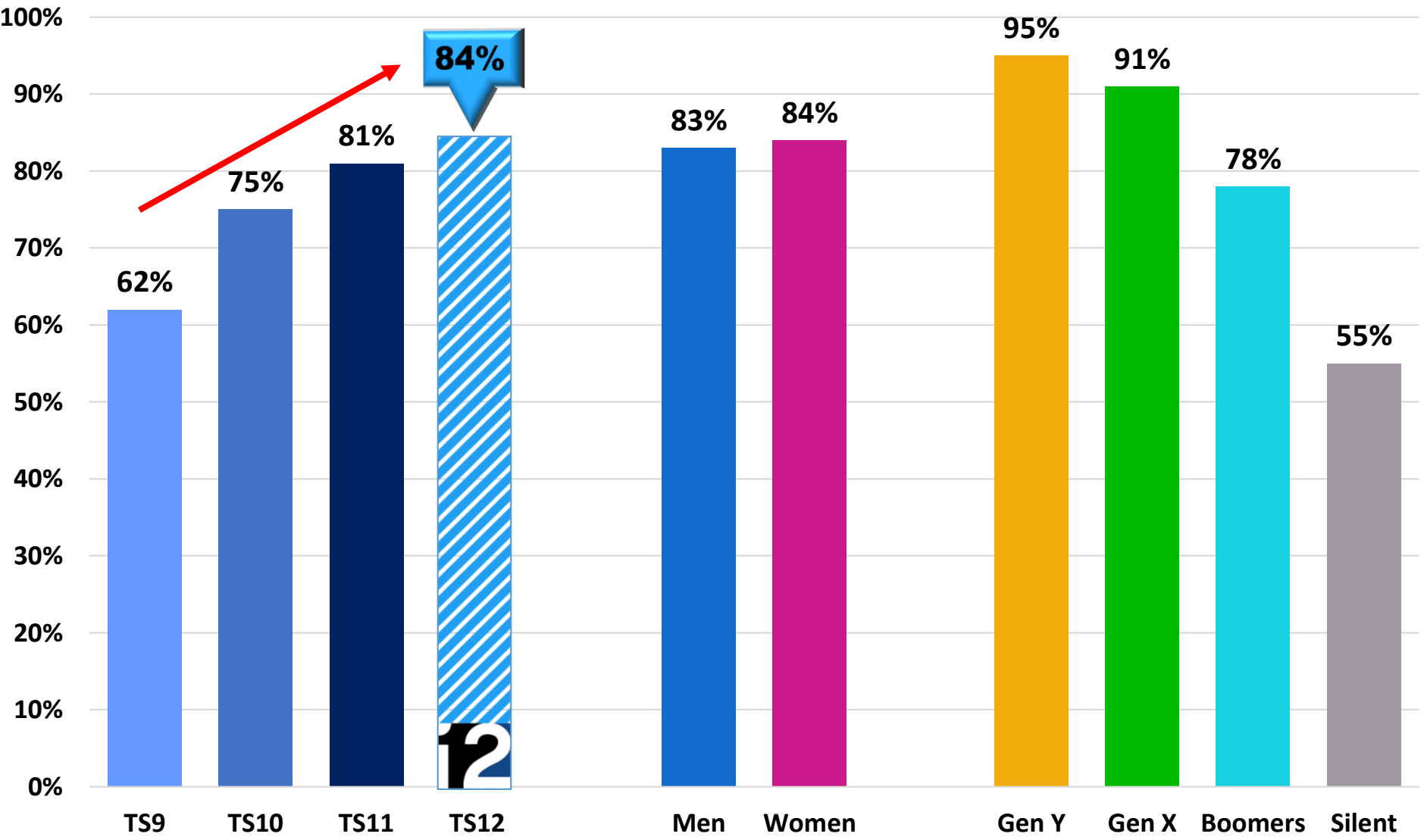


"I am addicted to my mobile phone."

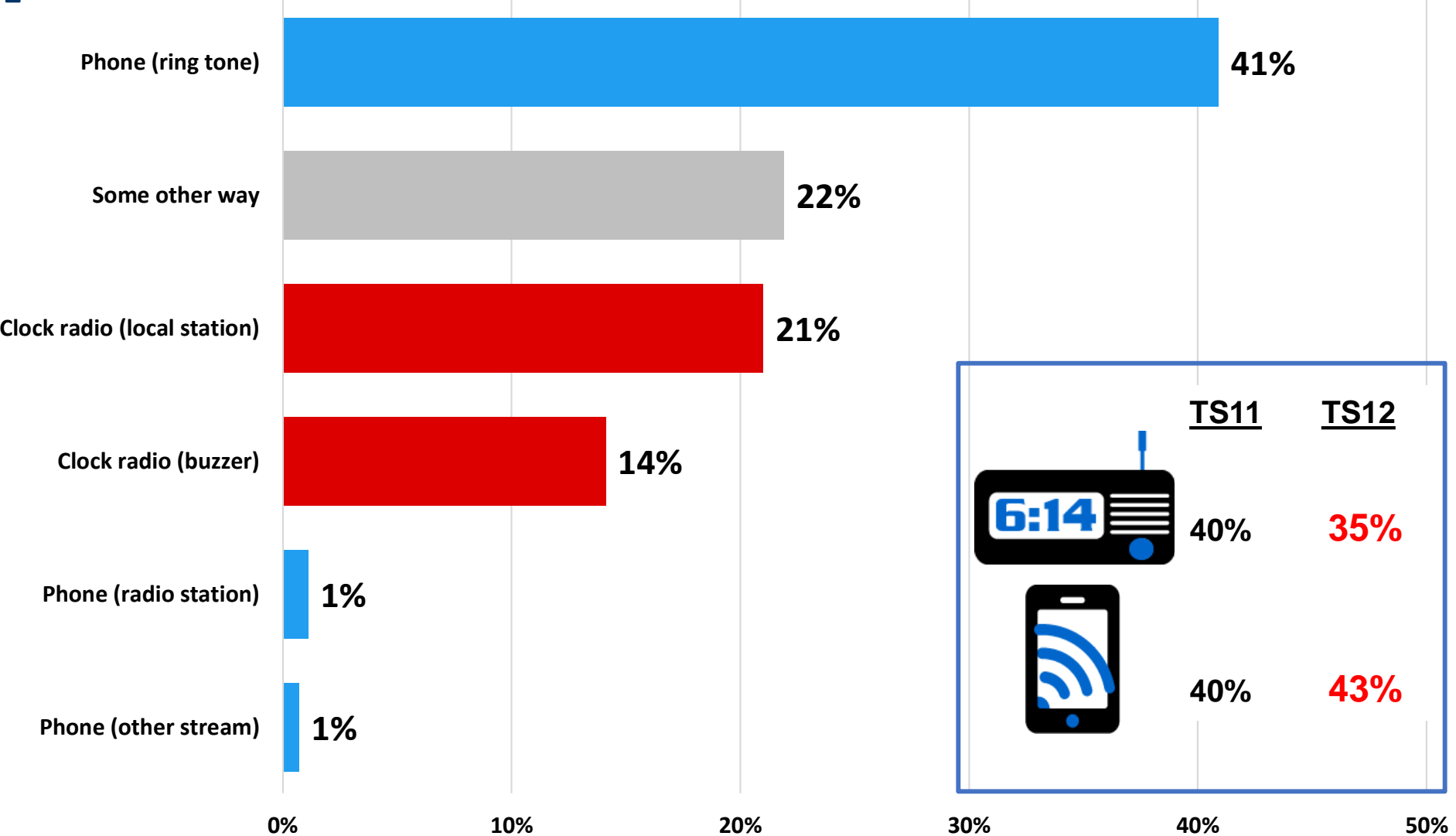
Among cell phone owners




Smartphone ownership continues to grow – more than 9 in 10 Millennials & Xers own one.




More people now wake up to a mobile phone than a clock radio.





TS11

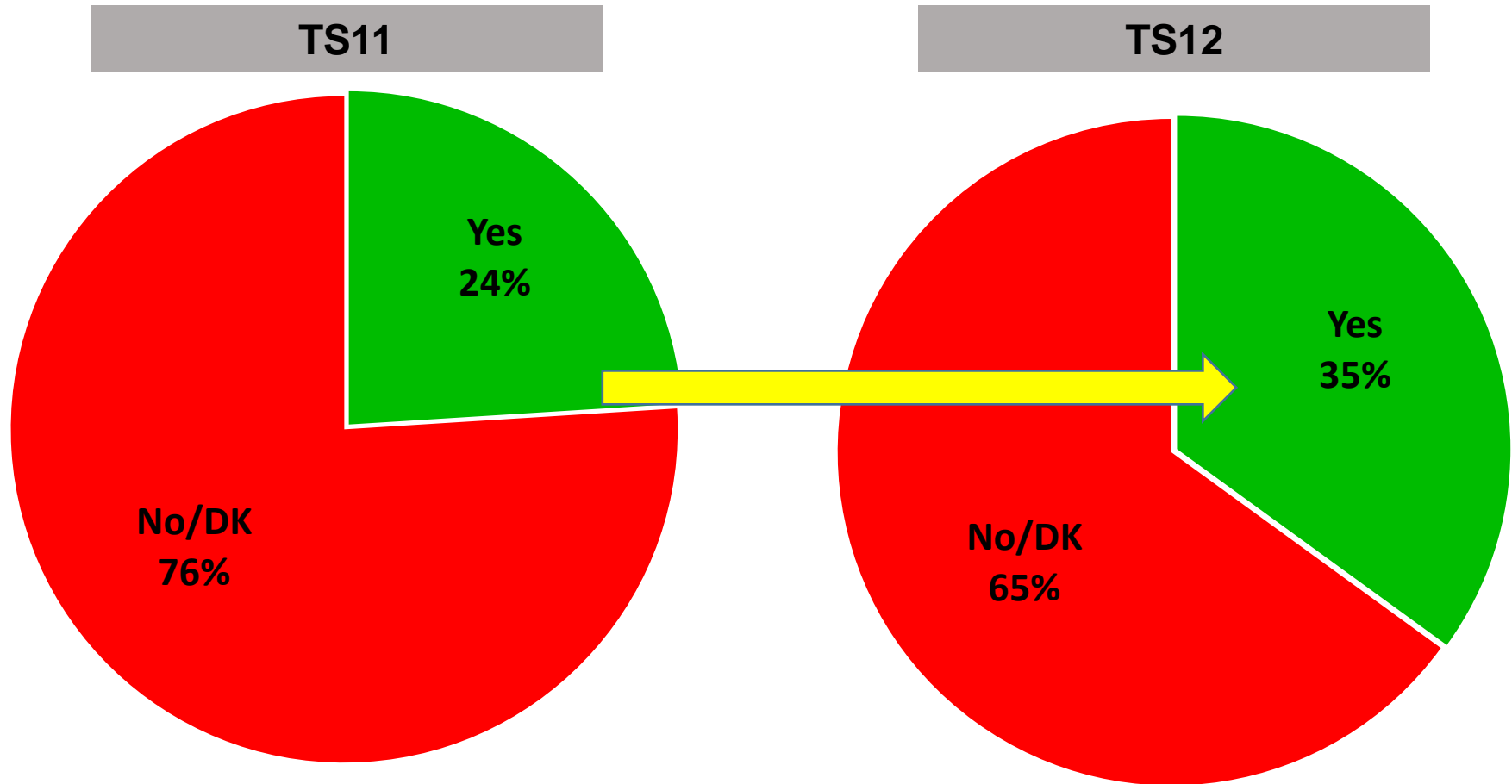
40%



TS12

43%

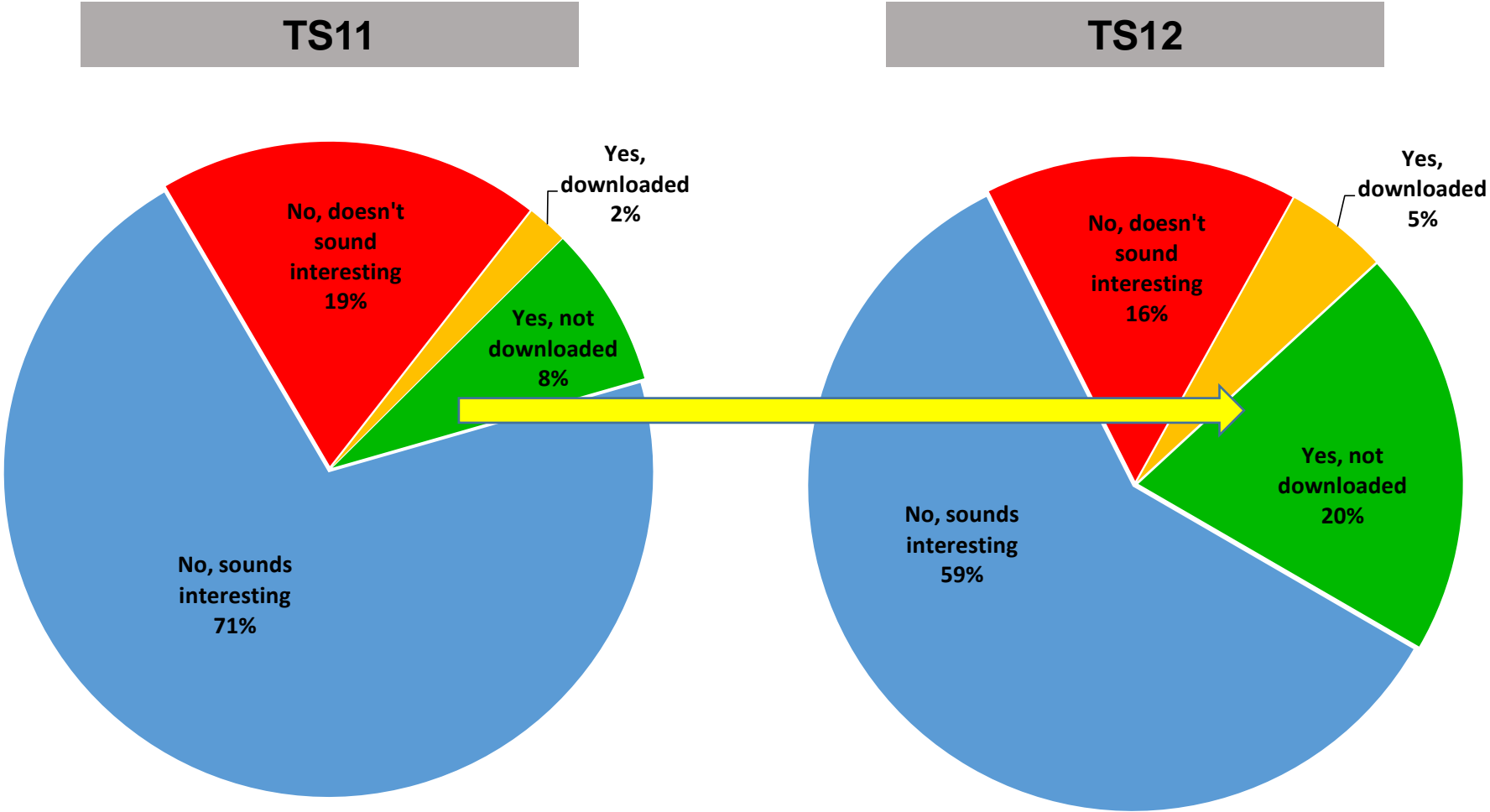
Awareness of the FM chip in smartphones has increased substantially.



“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?”

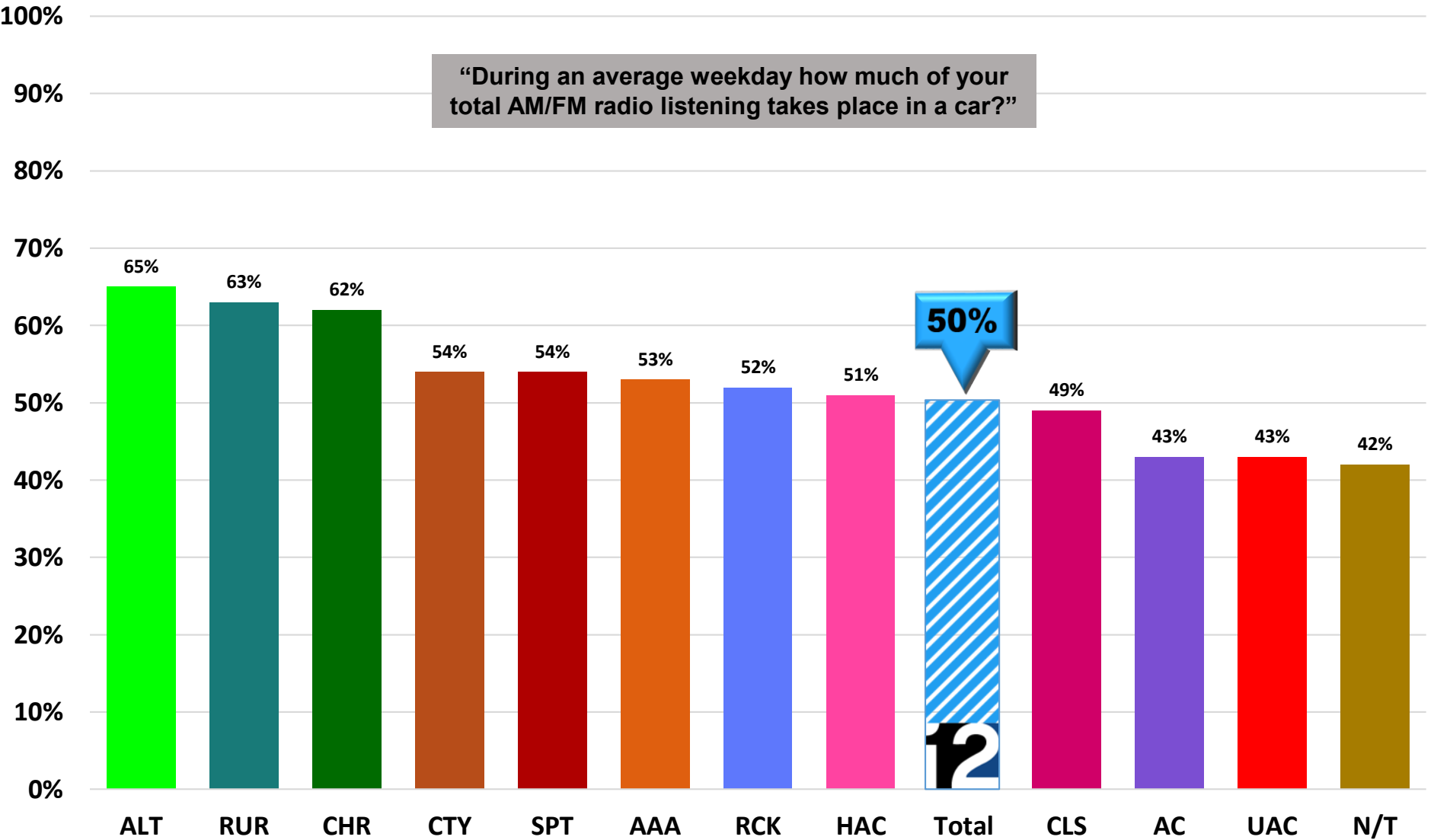
Among smartphone owners

More are aware of the Next/Radio app; now the challenge is generating more downloads.



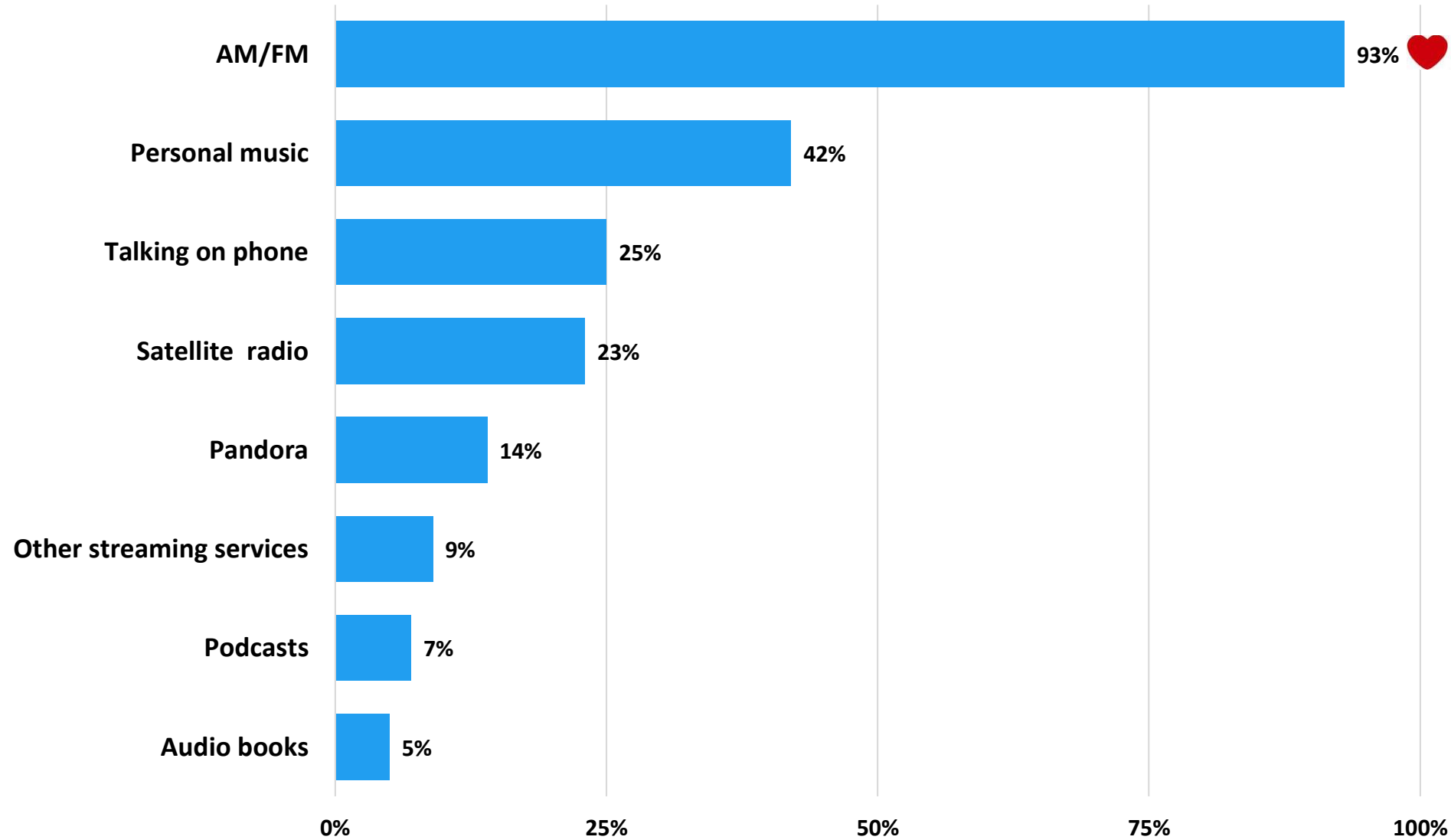
Among those who own a tablet or a smartphone

Half say all or most of the AM/FM radio listening takes place while in a car.



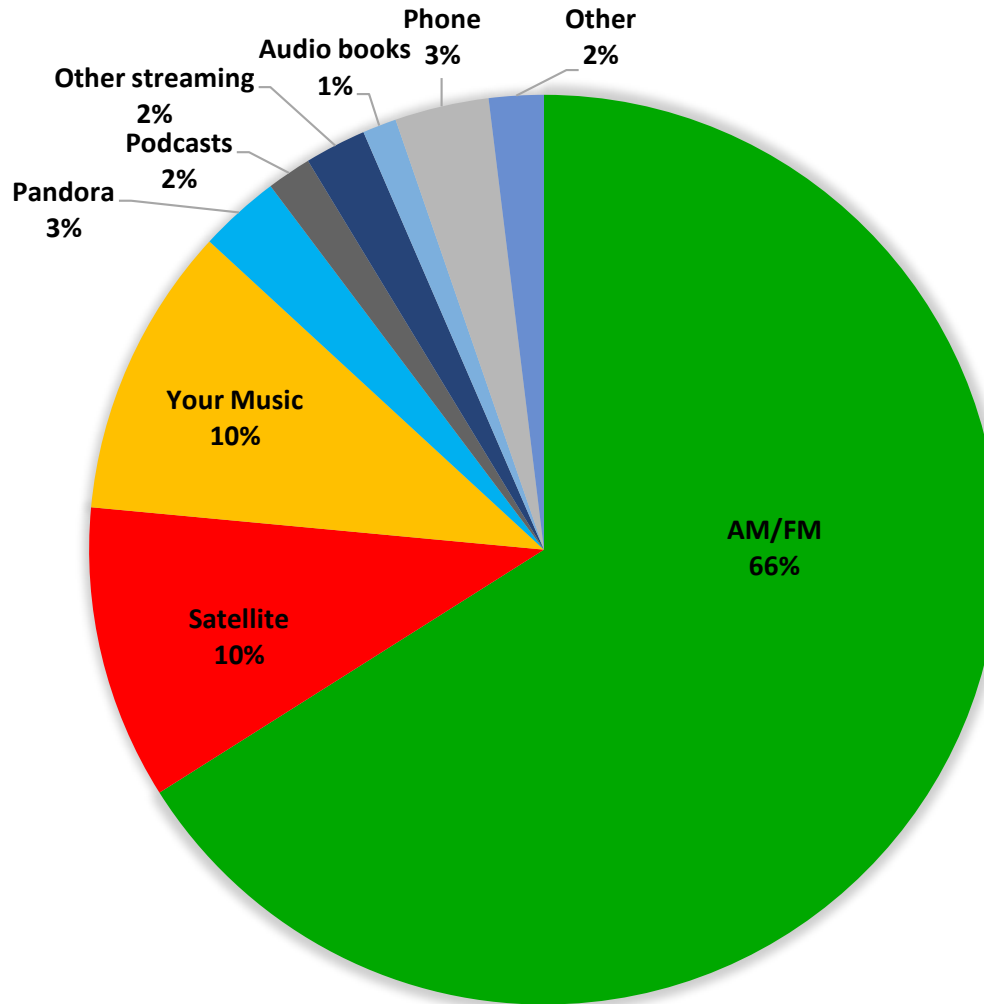
“100% of the time” or “most of the time”

More than 9 in 10 listen to AM/FM radio in a car during an average weekday.



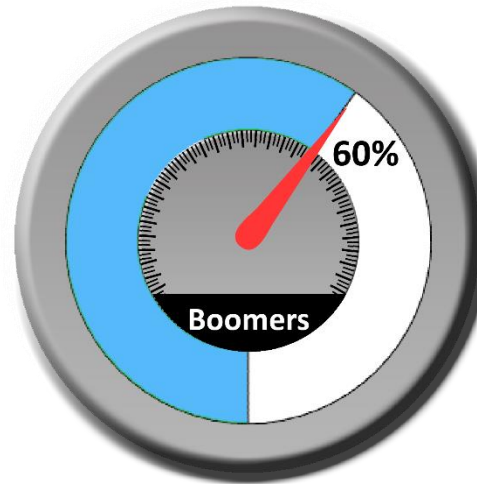
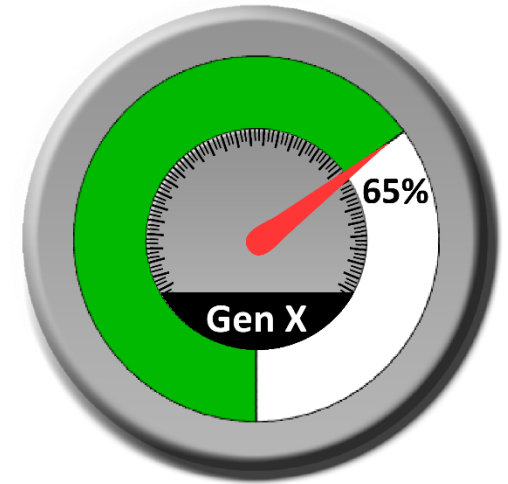
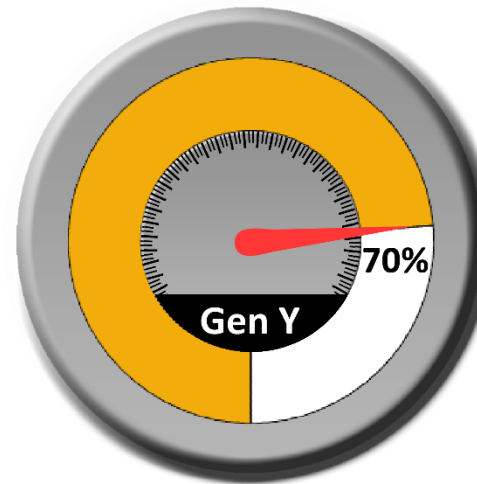
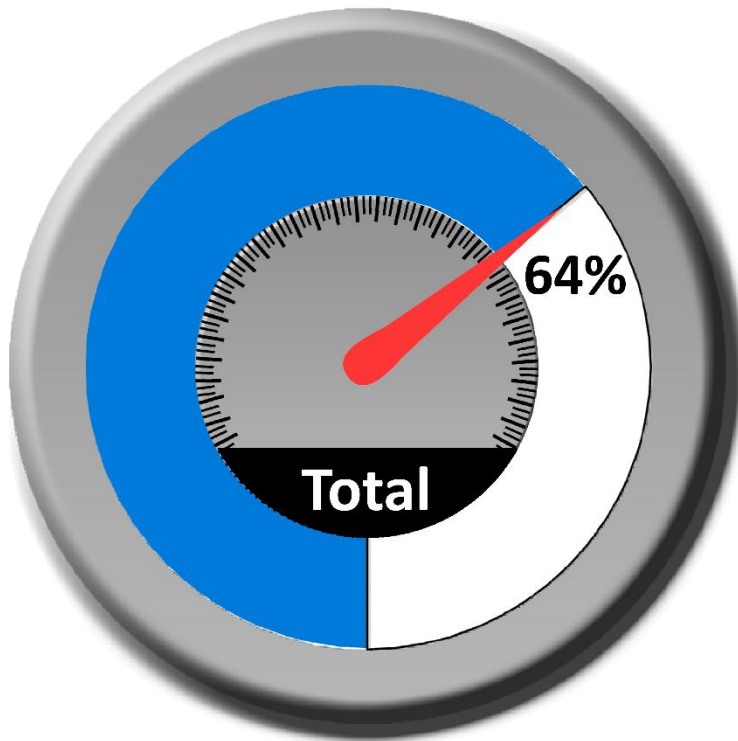
Among those who spend at least some time in a car
Average weekday - multiple answers allowed

Radio's share of in-car listening on a typical weekday is 66%, followed distantly by satellite radio & personal music collections.



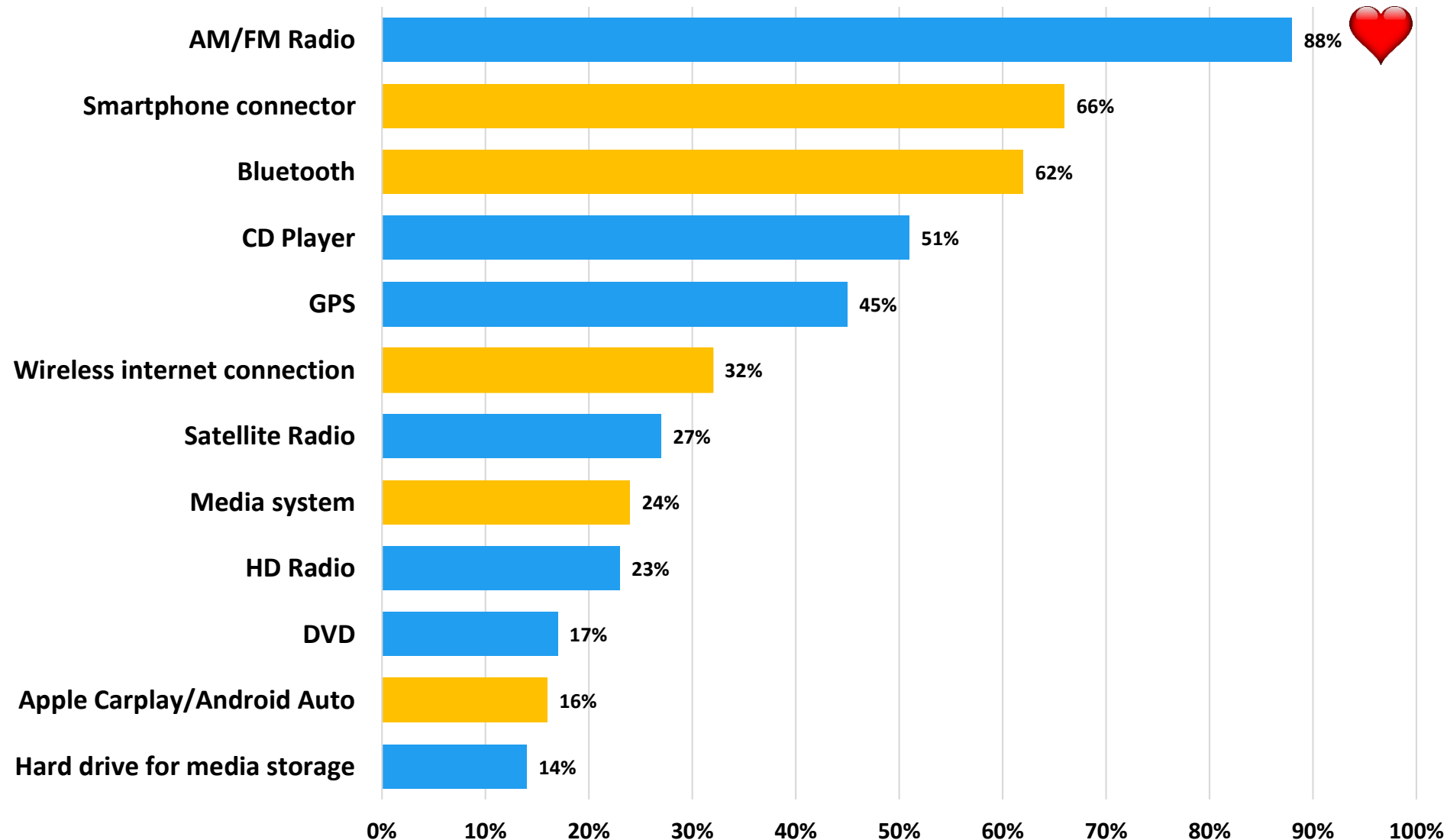
Percentage of time spent in a car with each source

Nearly two-thirds are able to connect a mobile phone or iPod to their cars.



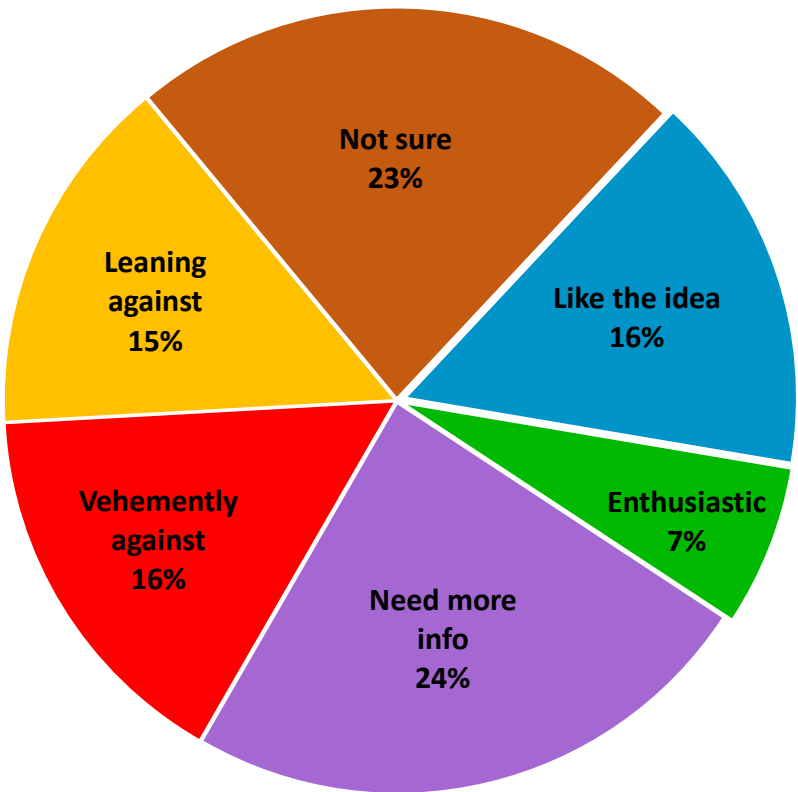
In the vehicle driven or ridden in most often

Nearly 9 of 10 new car buyers say it's very important it has an AM/FM radio.

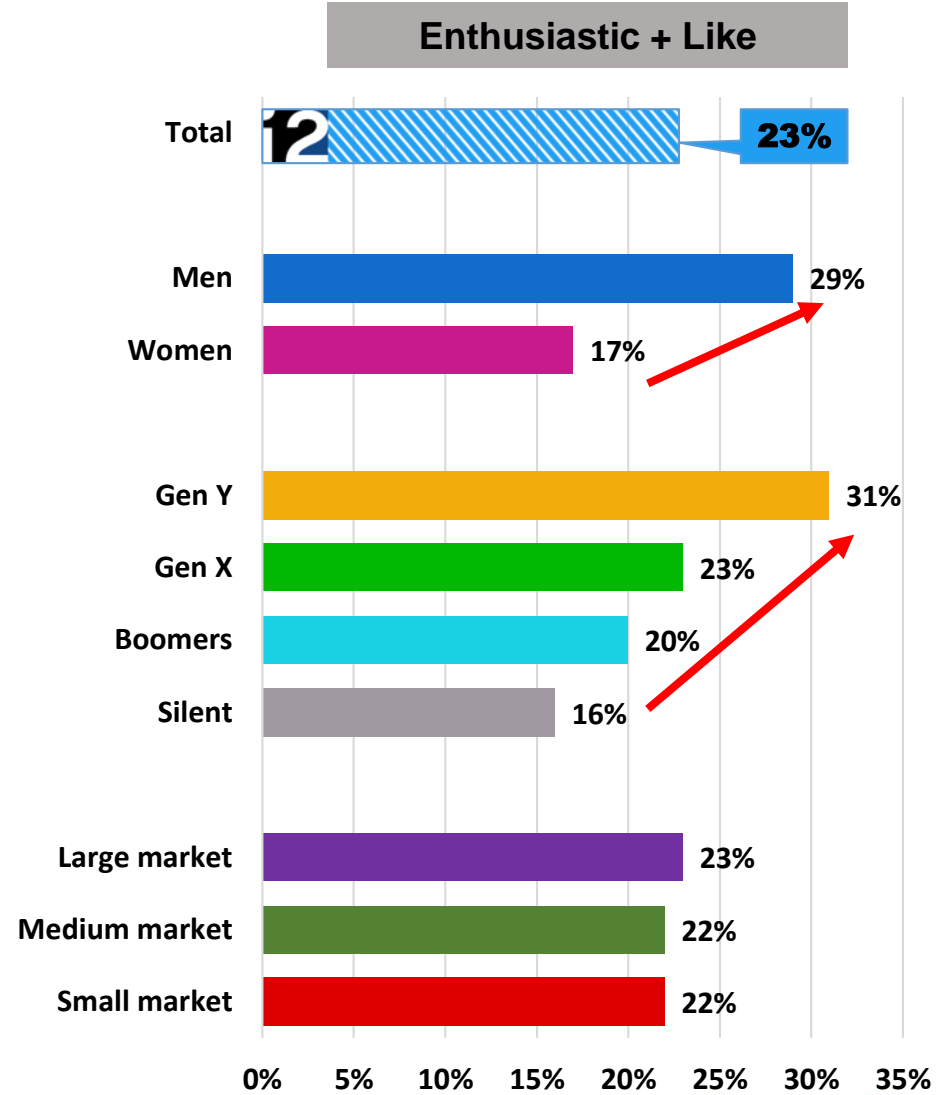


"Very Important" features among those planning on buying/leasing
(or already bought) a new vehicle in 2016

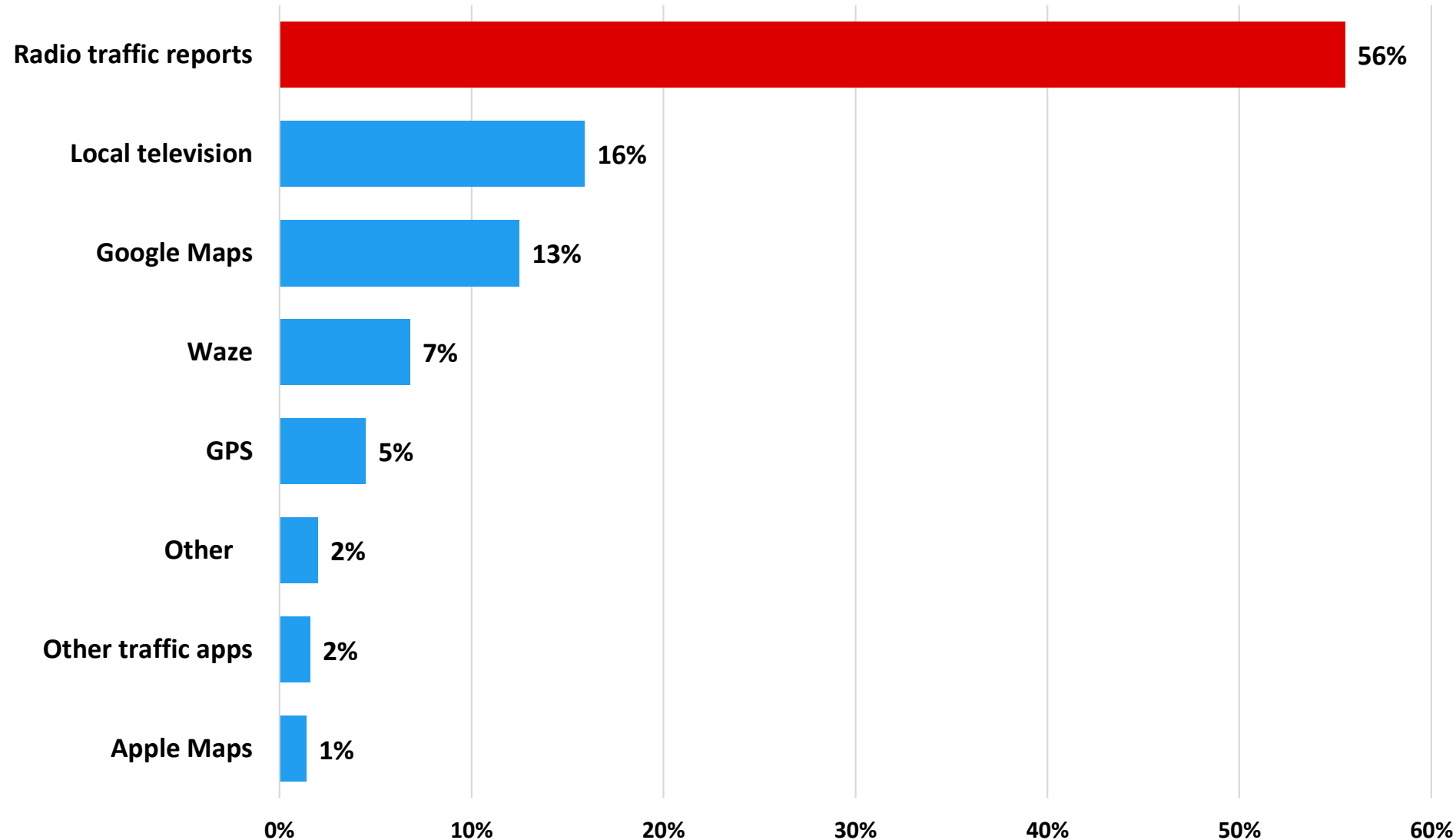
Perceptions lean negative about the prospect of autonomous cars.



“Based on what you know about ‘autonomous cars,’ which of the following best represents your opinion?”

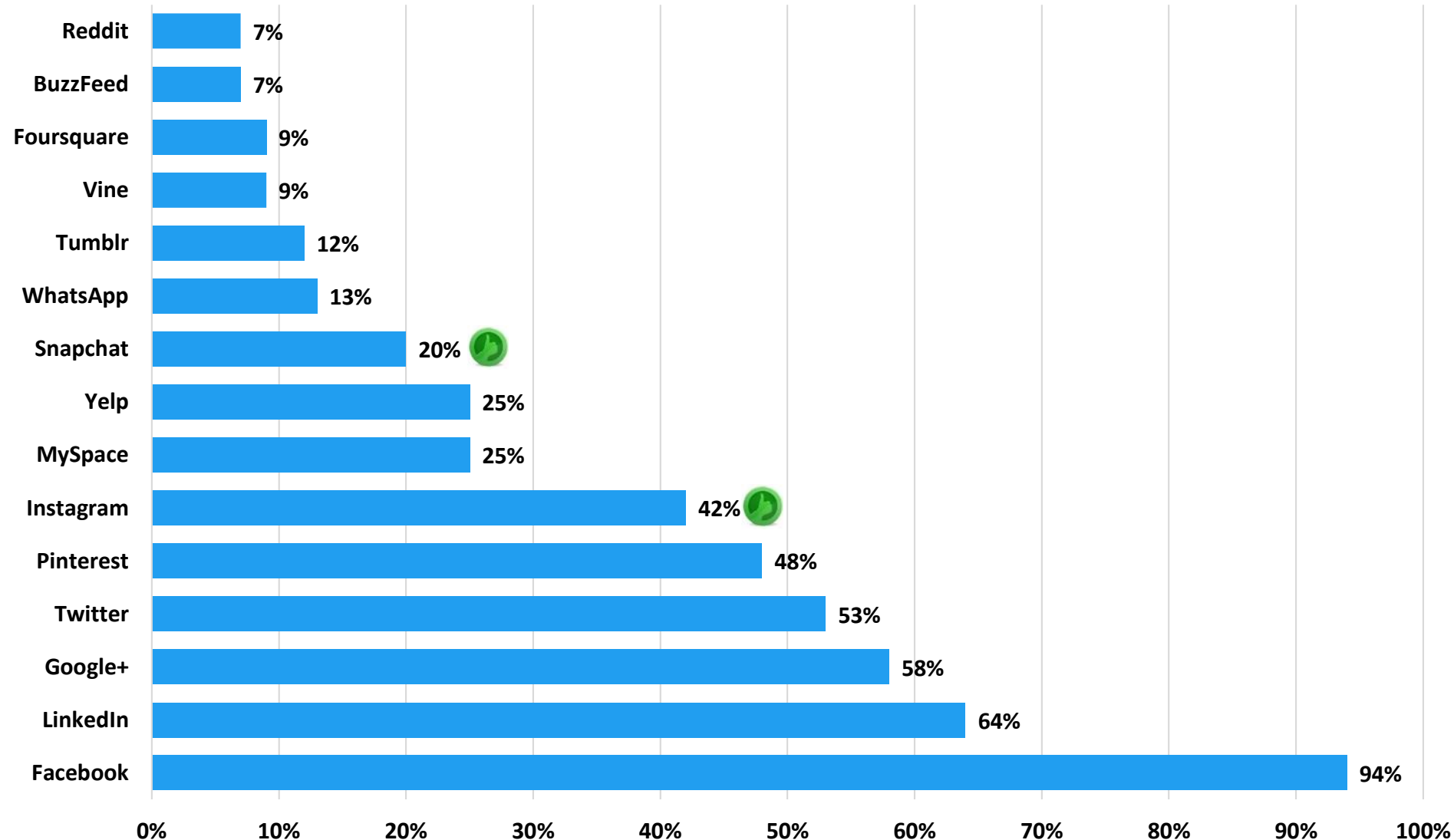


A majority say their primary source for traffic information is AM/FM radio.



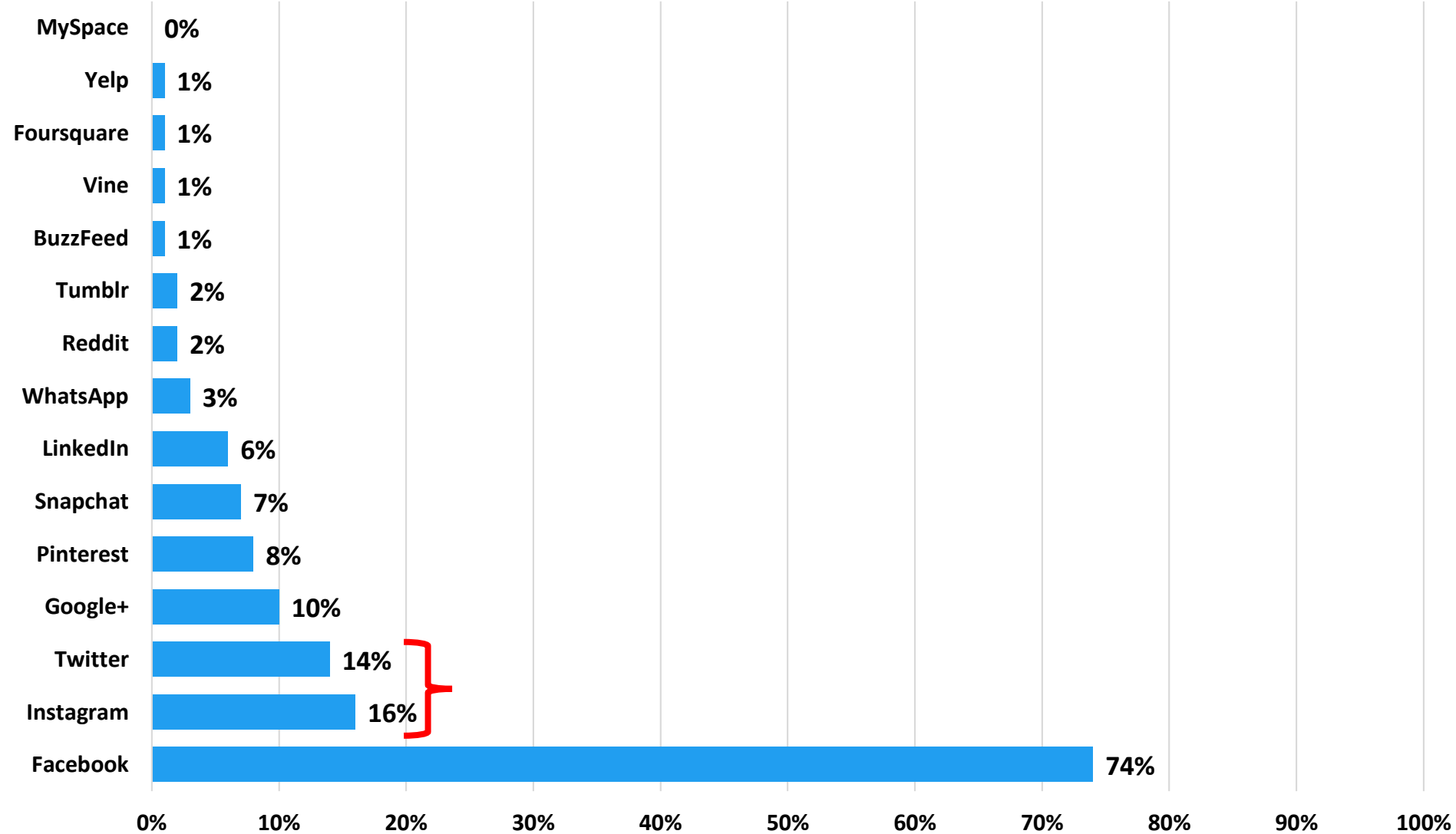
Among those that use traffic information

Of those with a social media profile, well more than 9 in 10 are on Facebook.



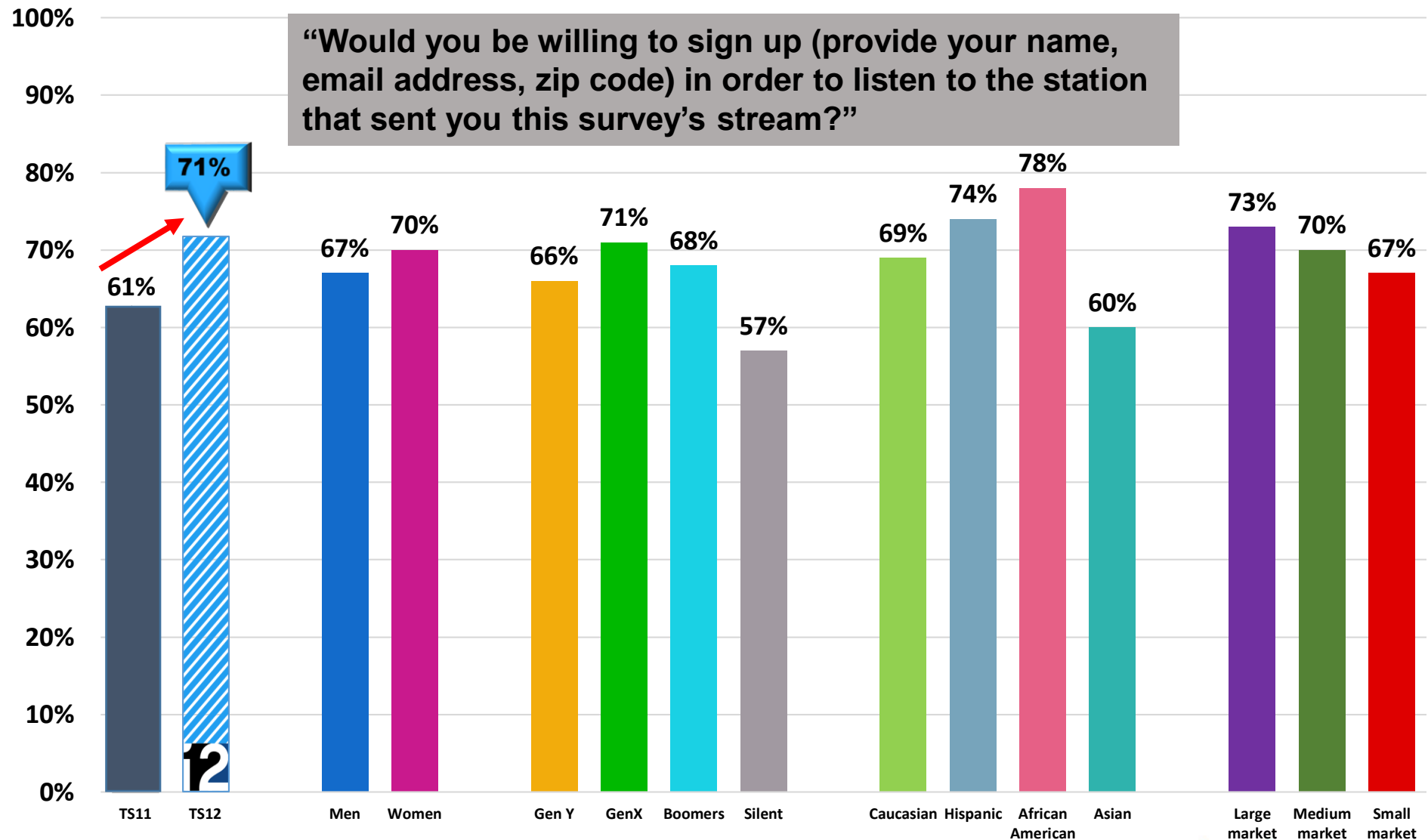
Of those with a social media profile

3 of 4 Facebook users visit the site at least daily – no other social platform is close.



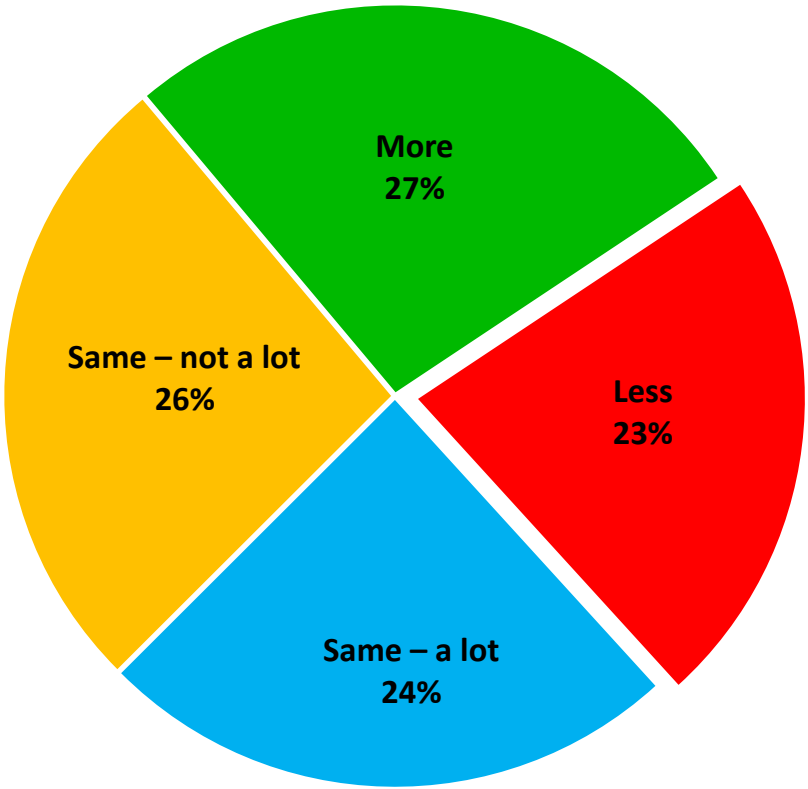
Among those with a profile on each platform

7 in 10 say they'd be willing to register in order to access their P1 station's stream.

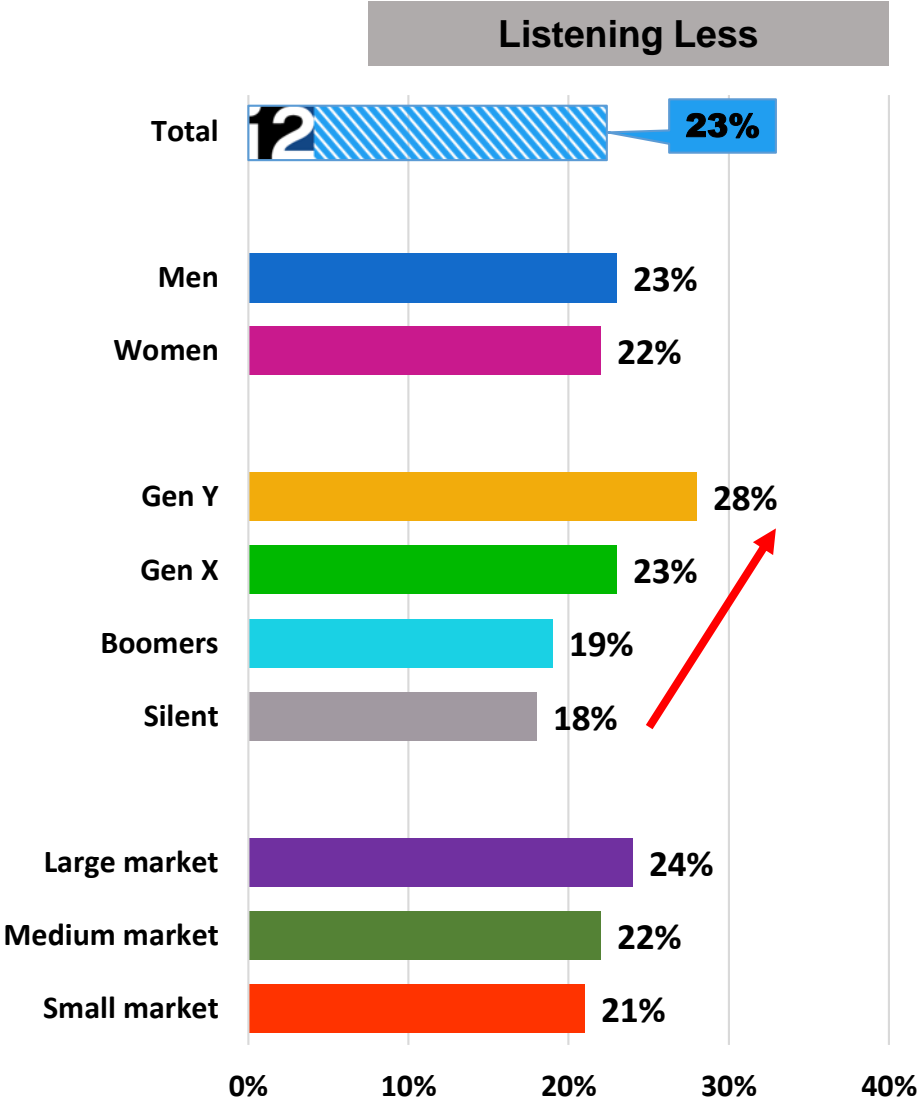


Among those who listen at least weekly to home station stream

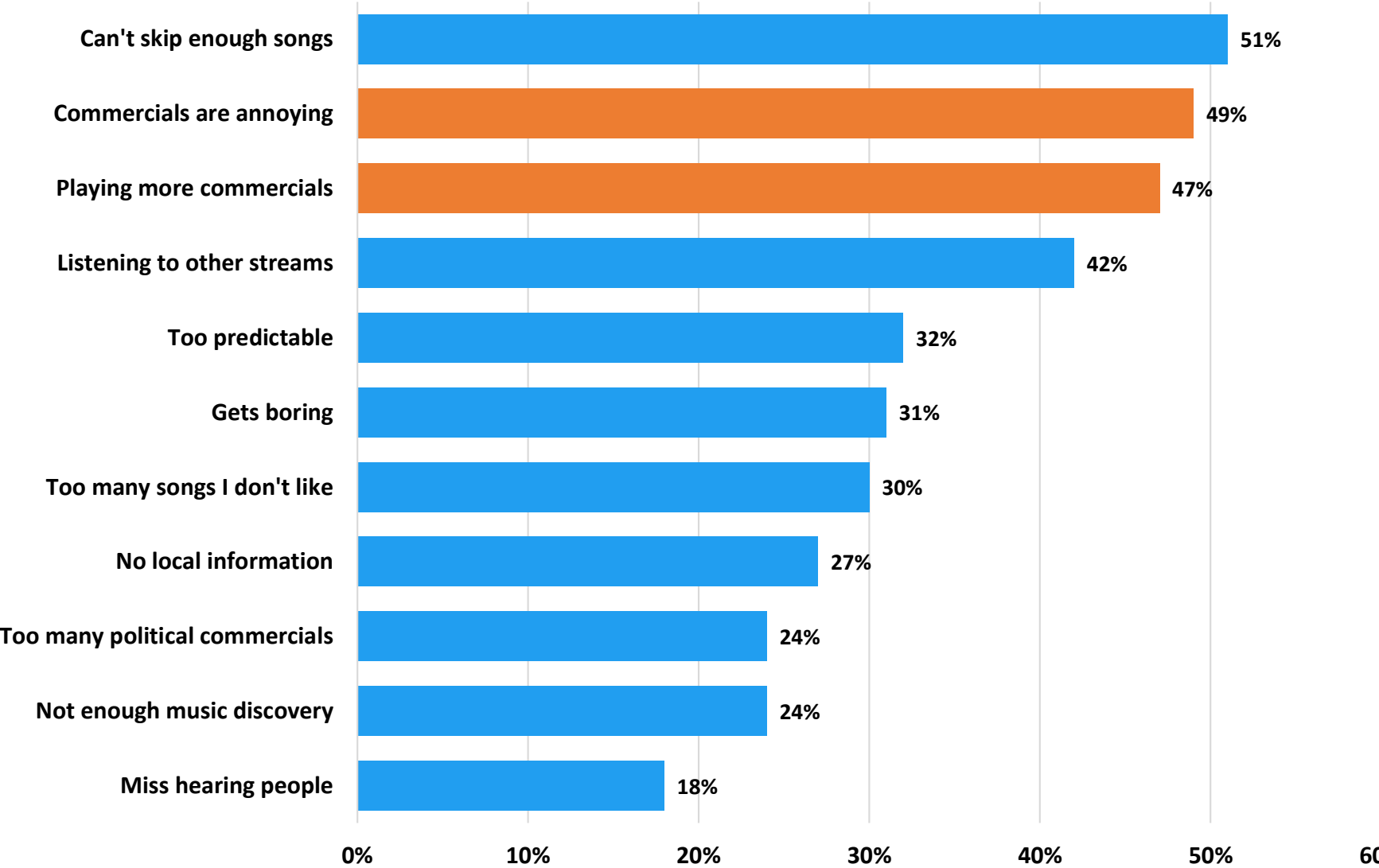
Millennials are most likely to say they've been listening less to Pandora in the past year.



Among those who listen to Pandora



Second only to “song skips,” key Pandora complaints revolve around commercials.



Among those listening less to Pandora



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