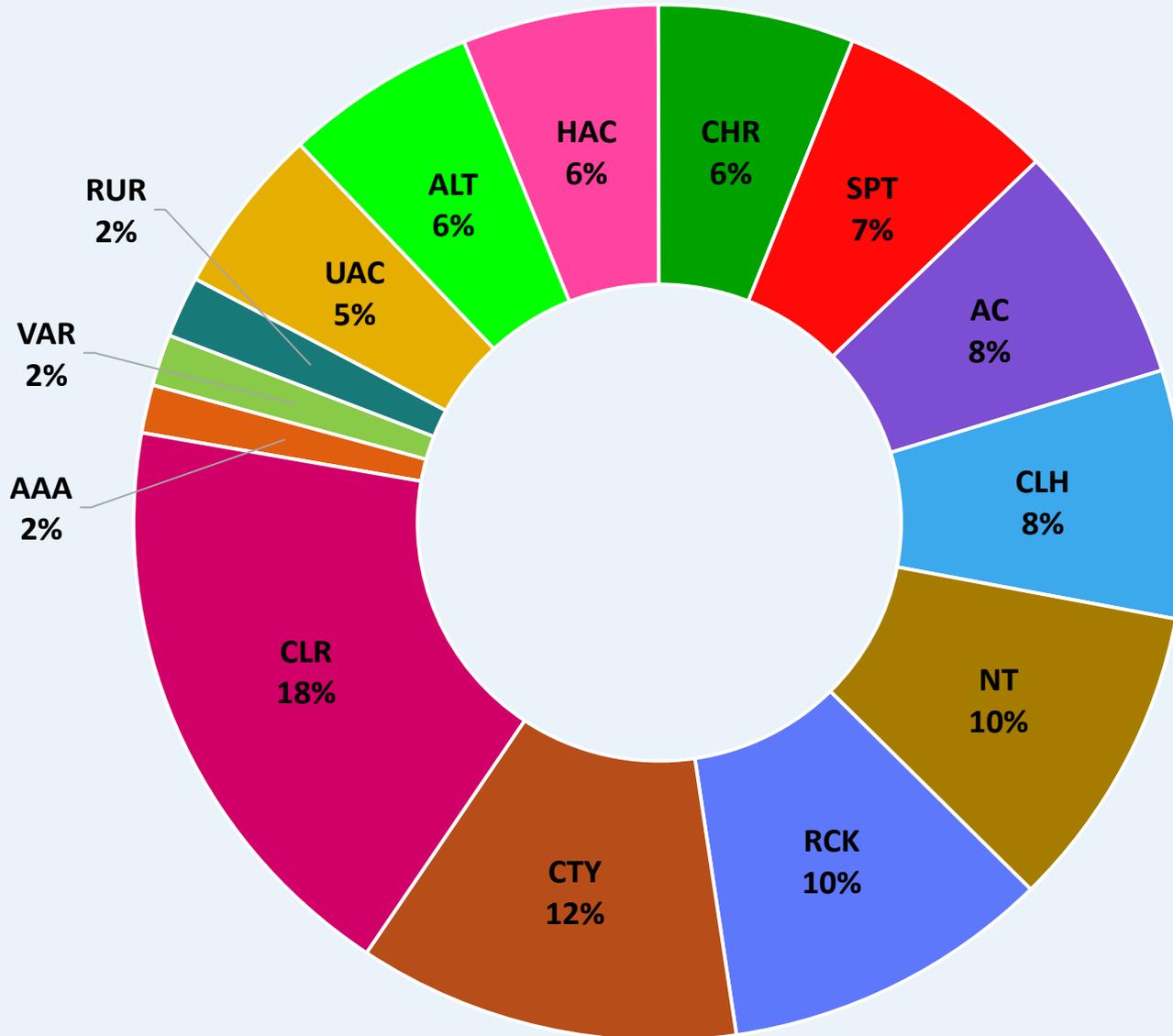


Methodology

- **321 radio stations in the U.S. & Canada**
- **N = 51,760**
- **Interview dates: January 16-February 27, 2017**
- **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 2016 market populations.**
- **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.**

Format Composition

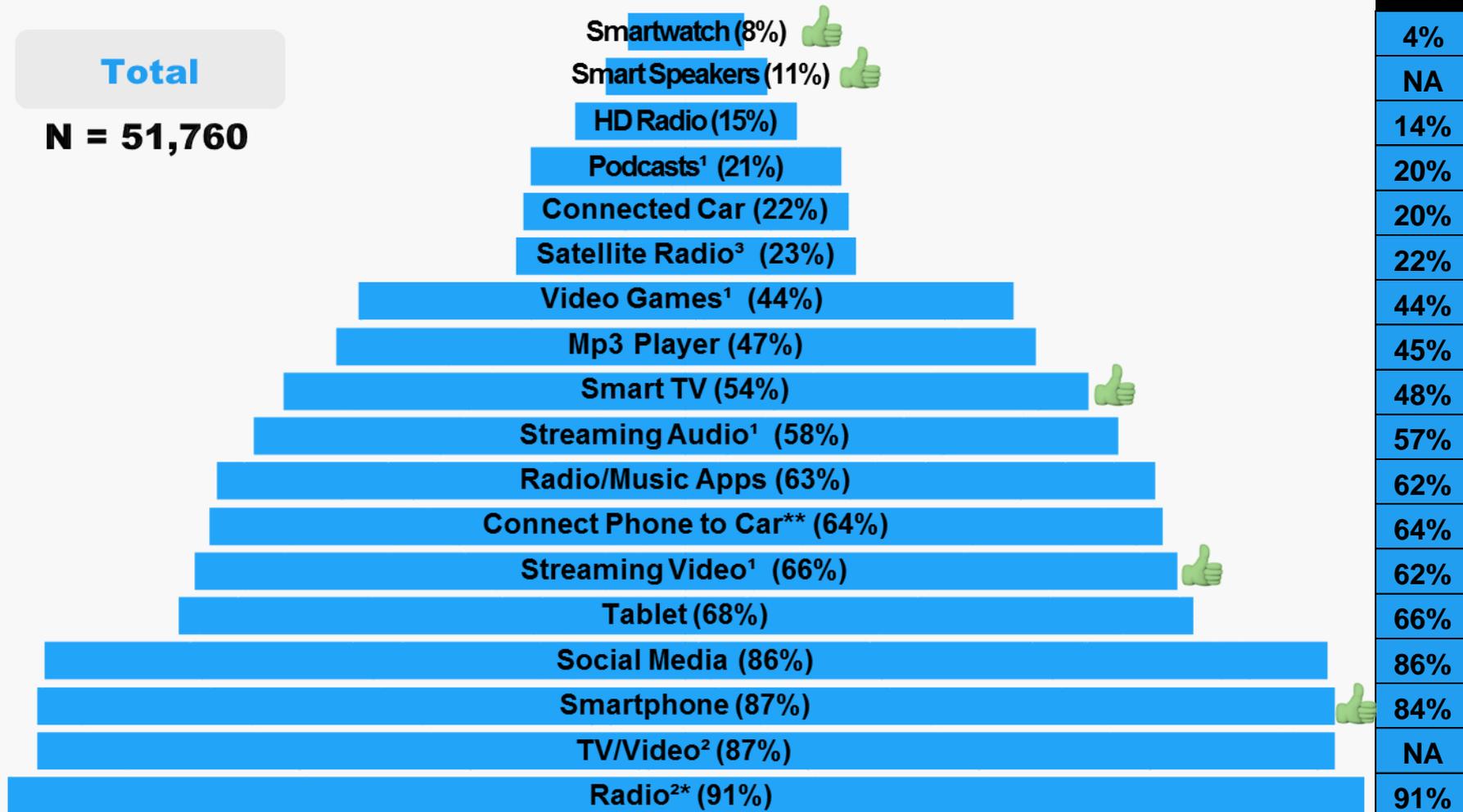




Media Pyramid 2017

Total

N = 51,760



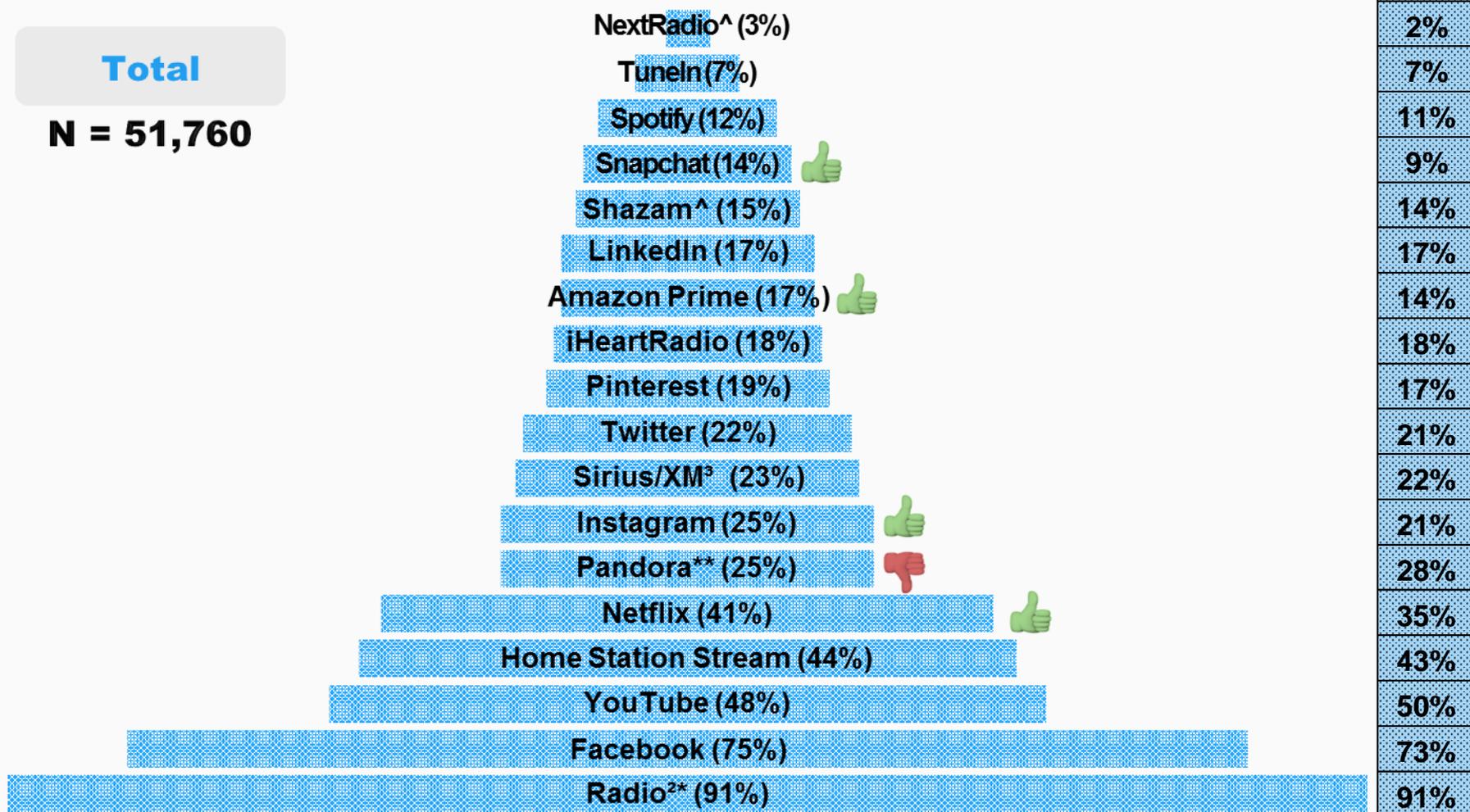
¹ Weekly or more ² 1+ hour per day ³ Paid & trial users * Any platform/device **Wording Change



Brand Pyramid 2017

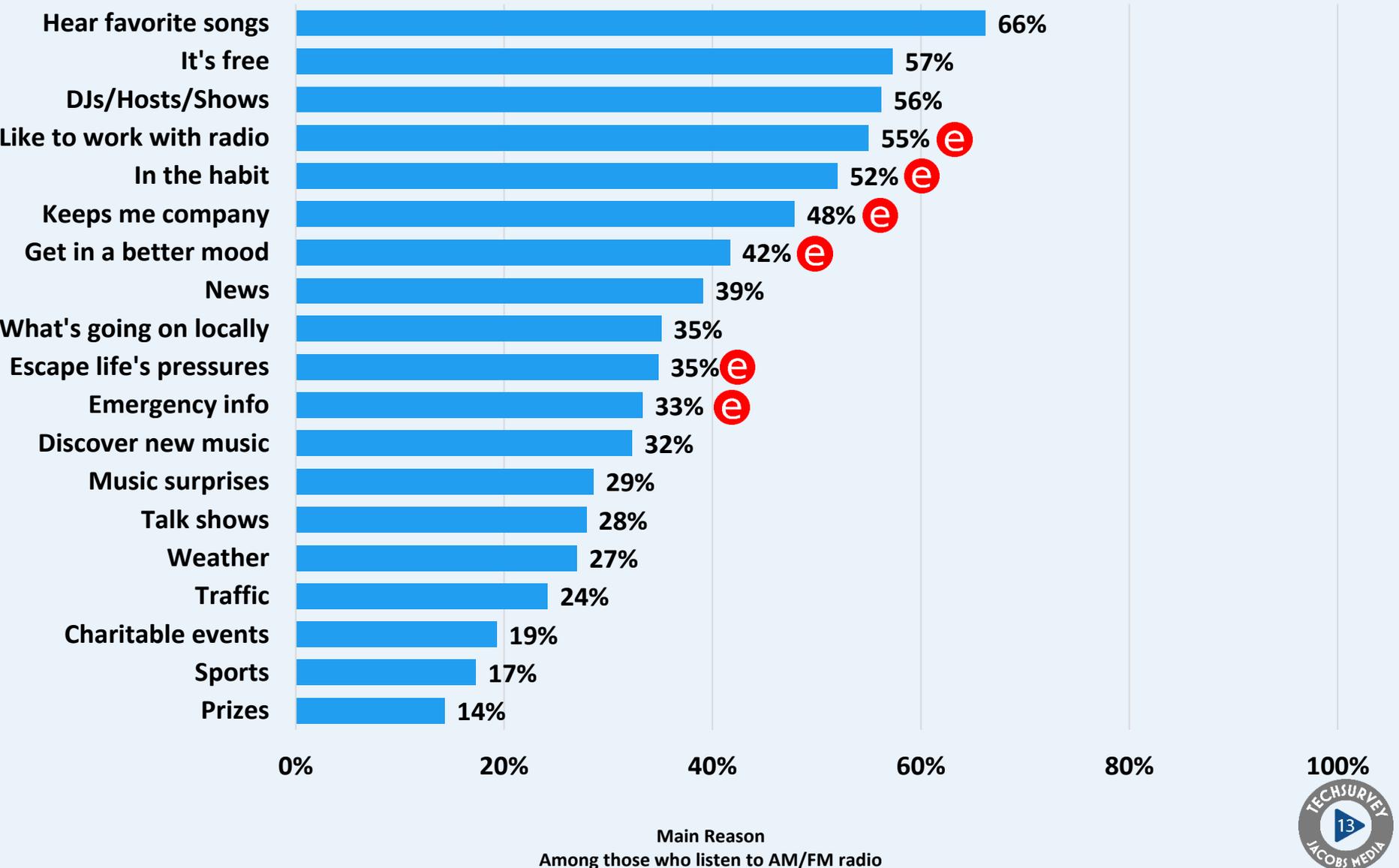
Total

N = 51,760

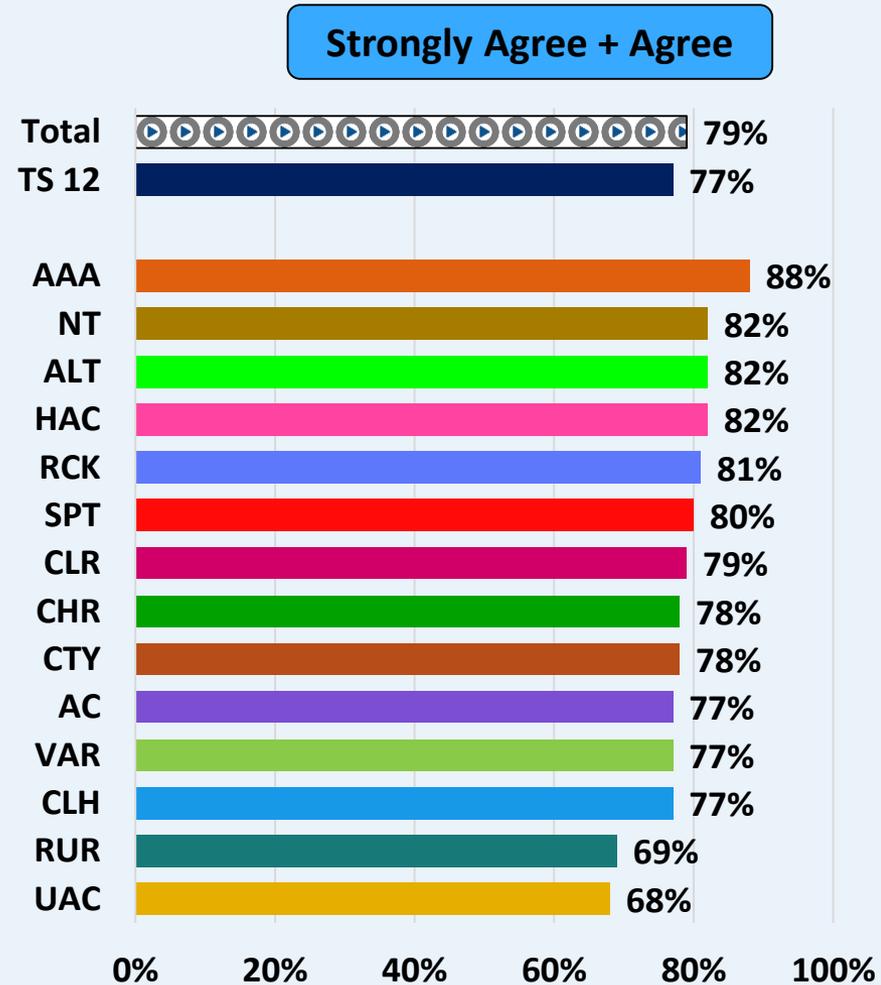
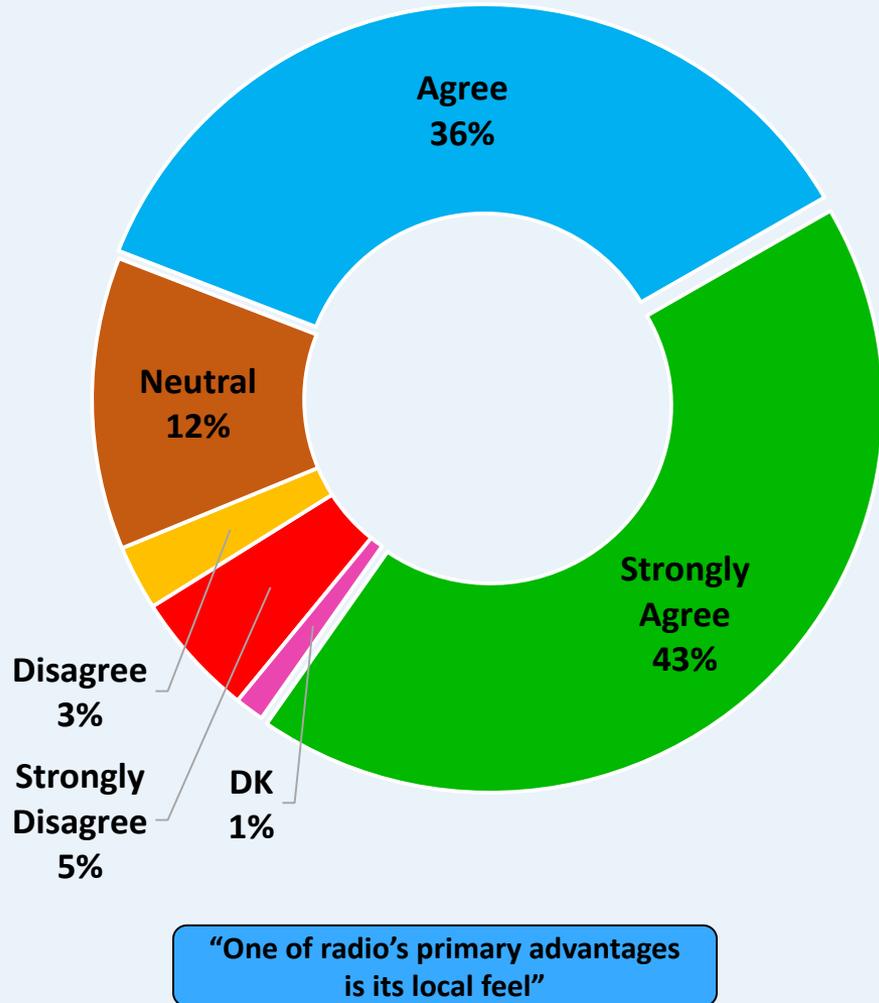


All based on weekly use unless otherwise noted 1+ hour per day² Paid & trial users³ Any Platform/Device* Excluding Canada** Downloaded^

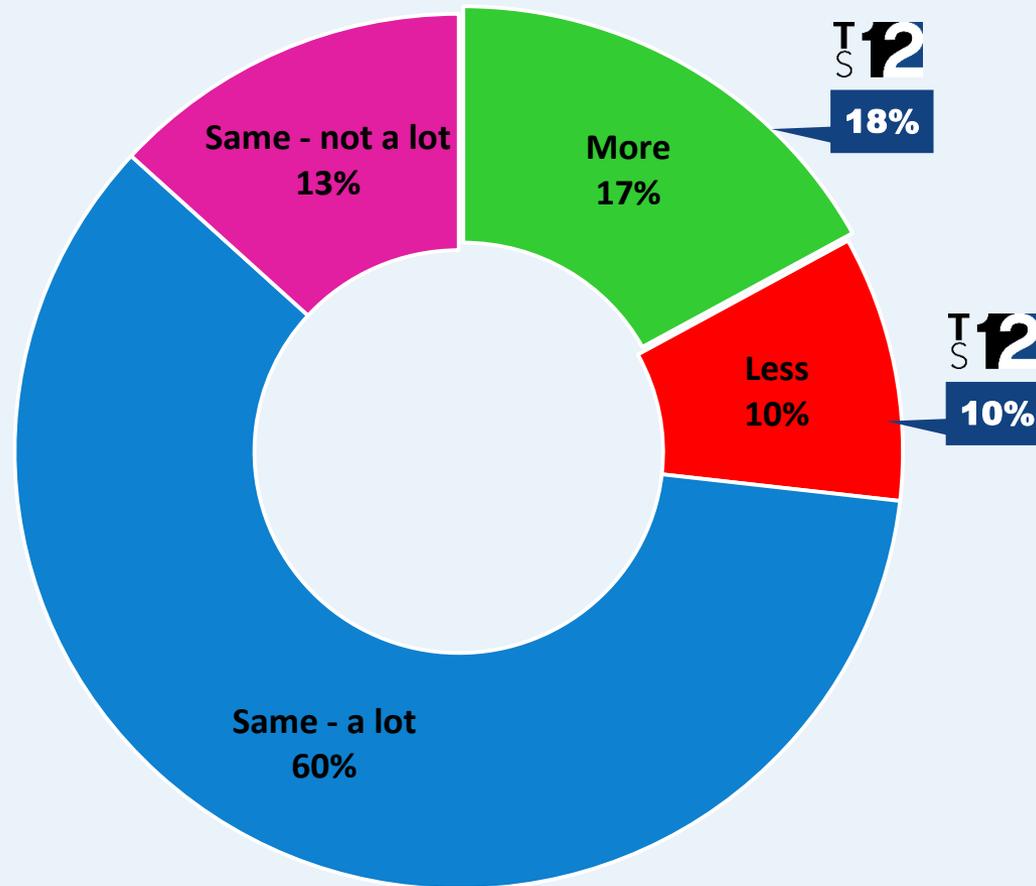
Why radio? Music & personalities rule, but so do powerful “emotional benefits.”



Nearly 8 in 10 say a key radio advantage is its local feel.

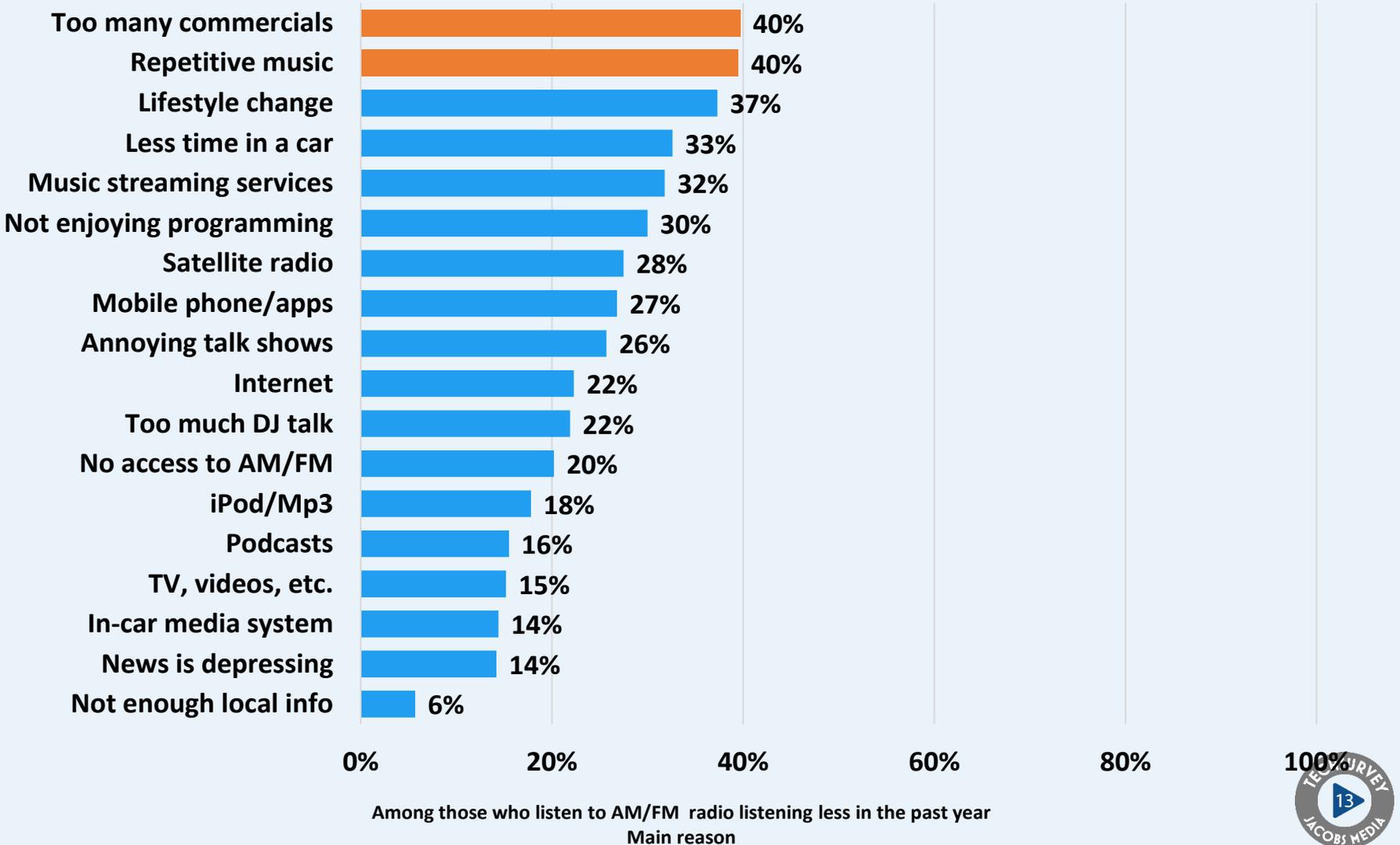


17% say they're listening to more AM/FM radio in the past year. Only 1 in 10 listens less – the same as last year.

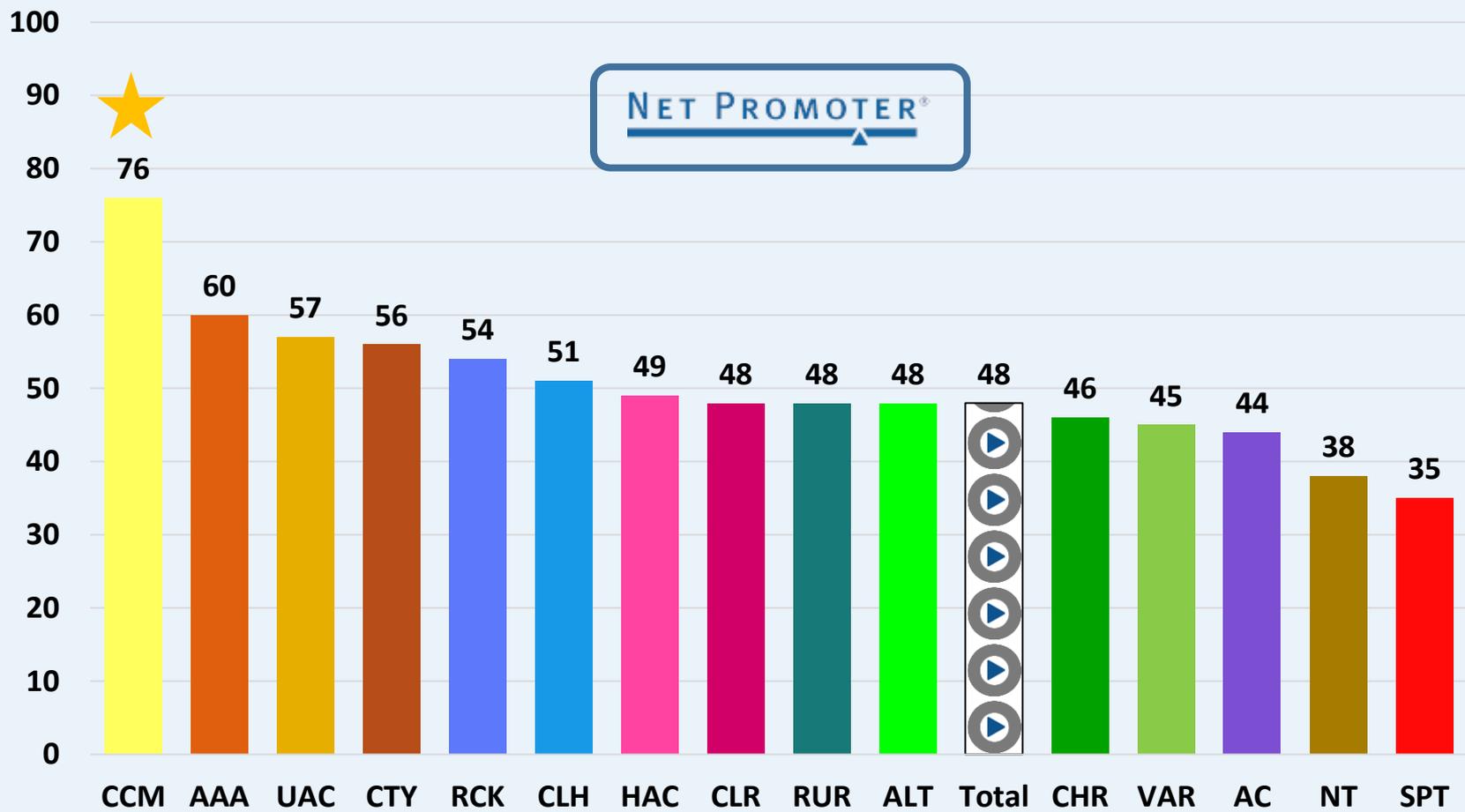


Past Year
Among those who listen to AM/FM radio

Why less radio? While digital is an issue, the biggest “speed bumps” are too many commercials & music repetition.

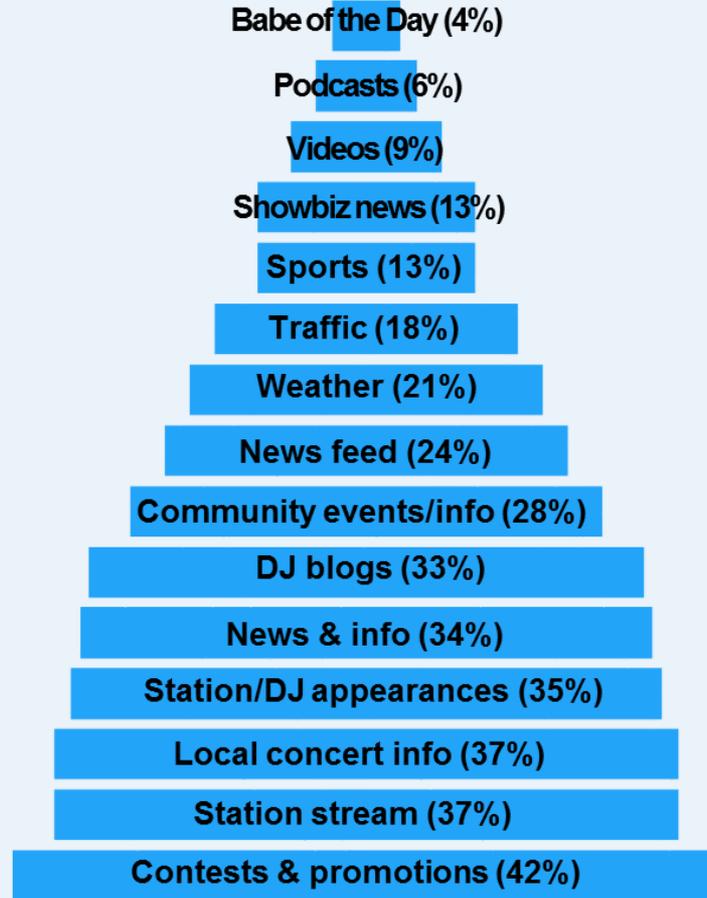


The highest “Net Promoter” recommendation scores are for Christian music radio, followed by Triple A, Hot AC, Country and Rock.



Contests are the key reason for station website visits, followed by streaming & local concert information.

Total

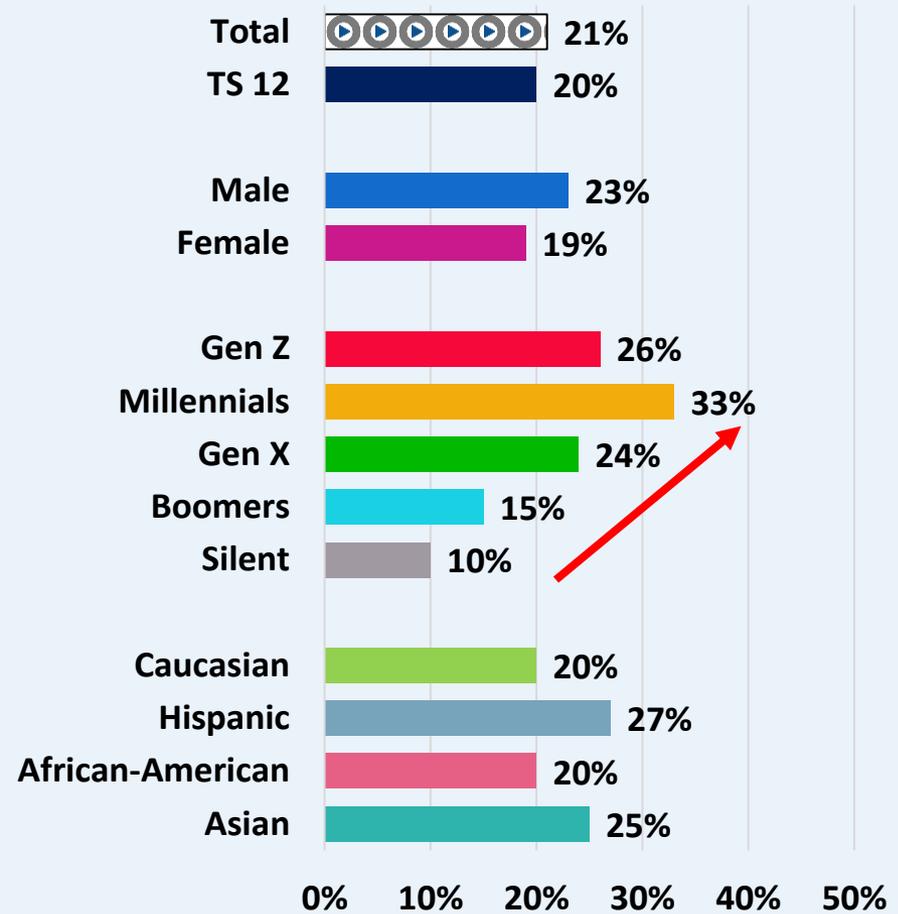
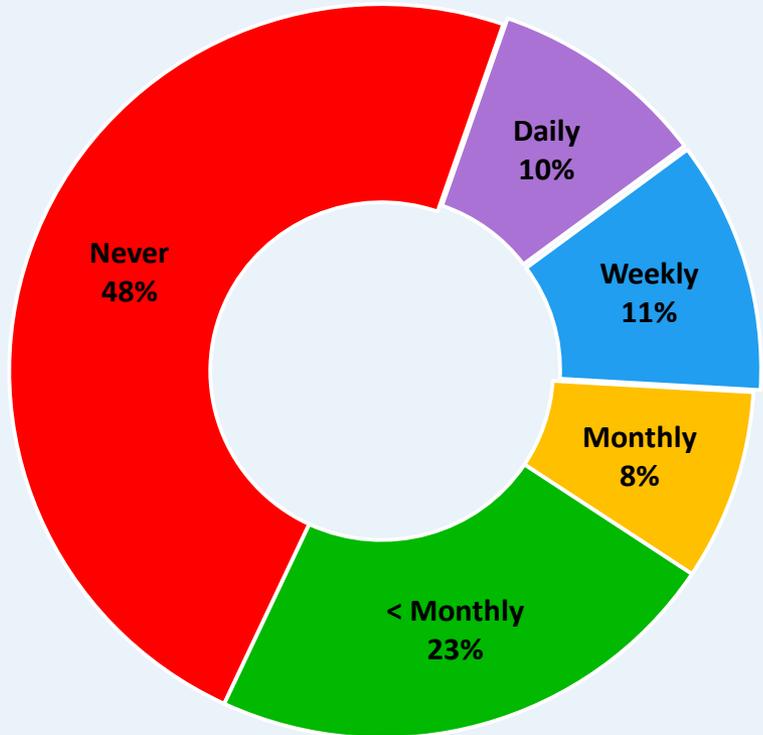


Main Reason

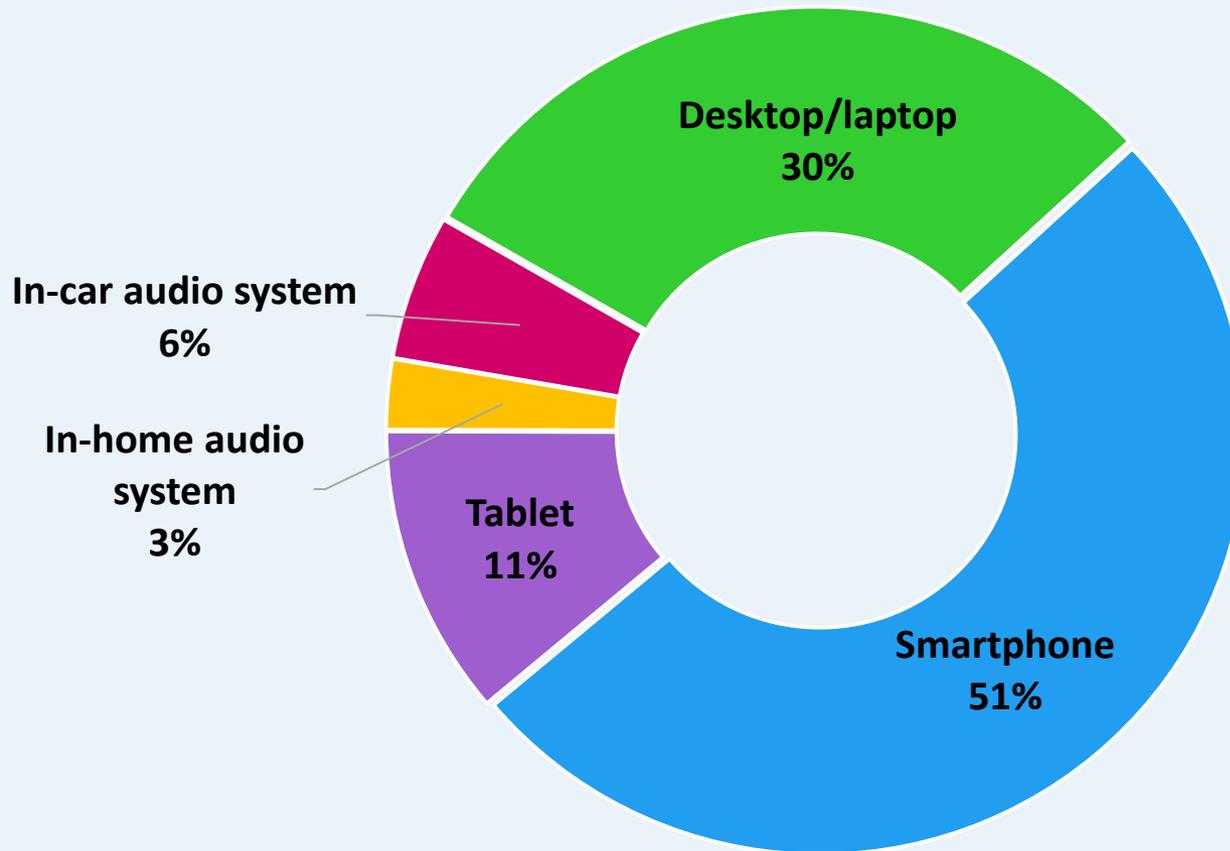
Among those who visit home station website monthly or more often

One-fifth listen to podcasts weekly or more often – especially Millennials.

Weekly or more

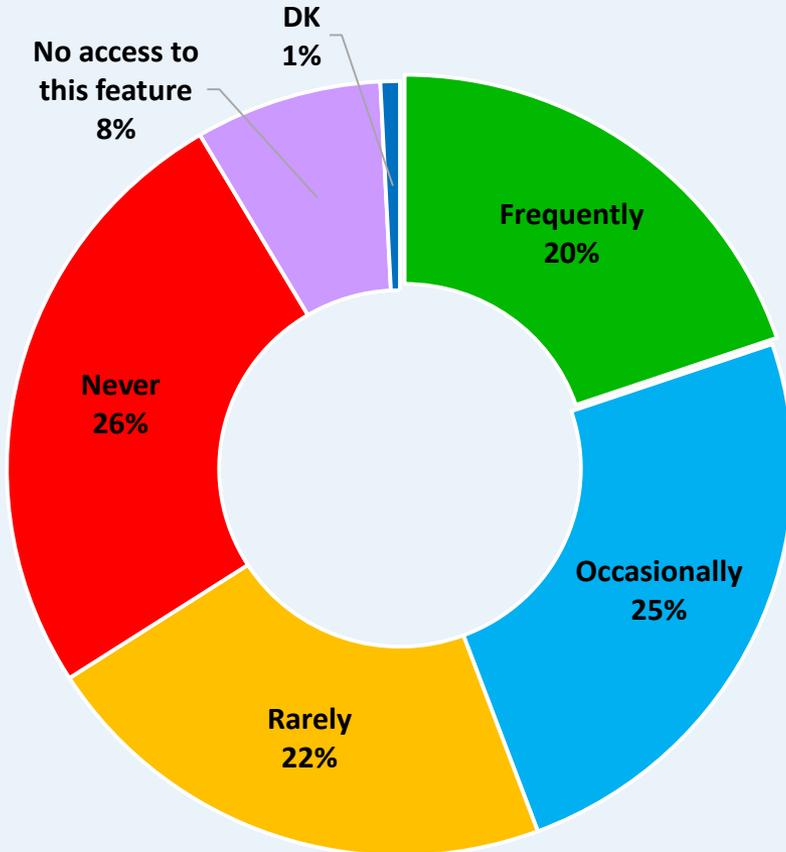


Half of those who listen to podcasts to use their smartphones.

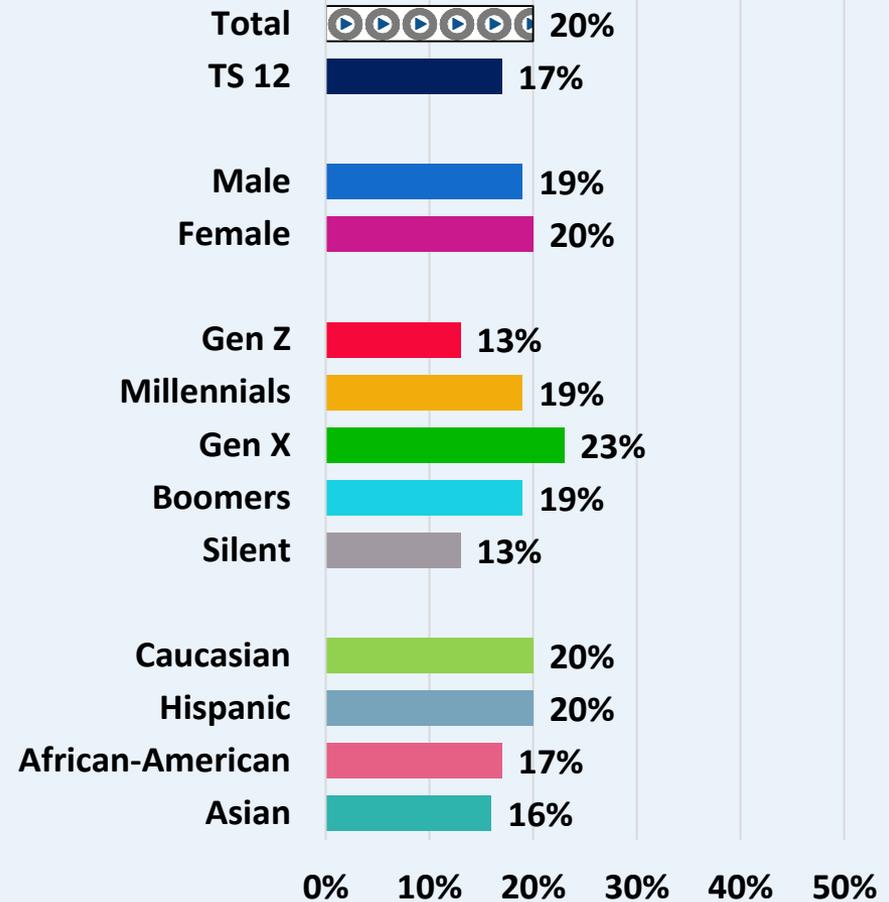


Among those who listen to podcasts/on-demand audio monthly or more

One-fifth frequently use voice commands on devices they own, especially Gen Xers.

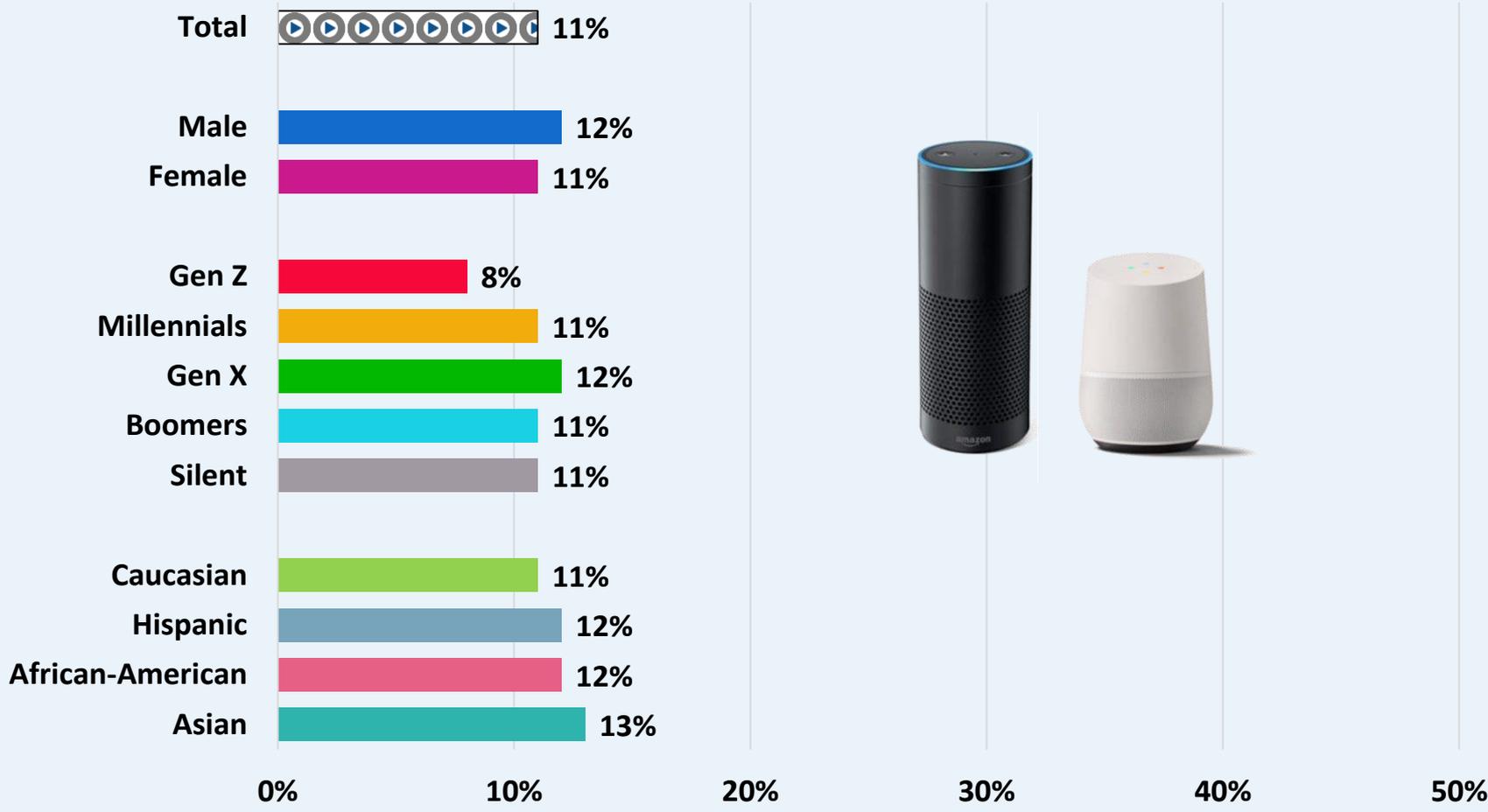


Frequently

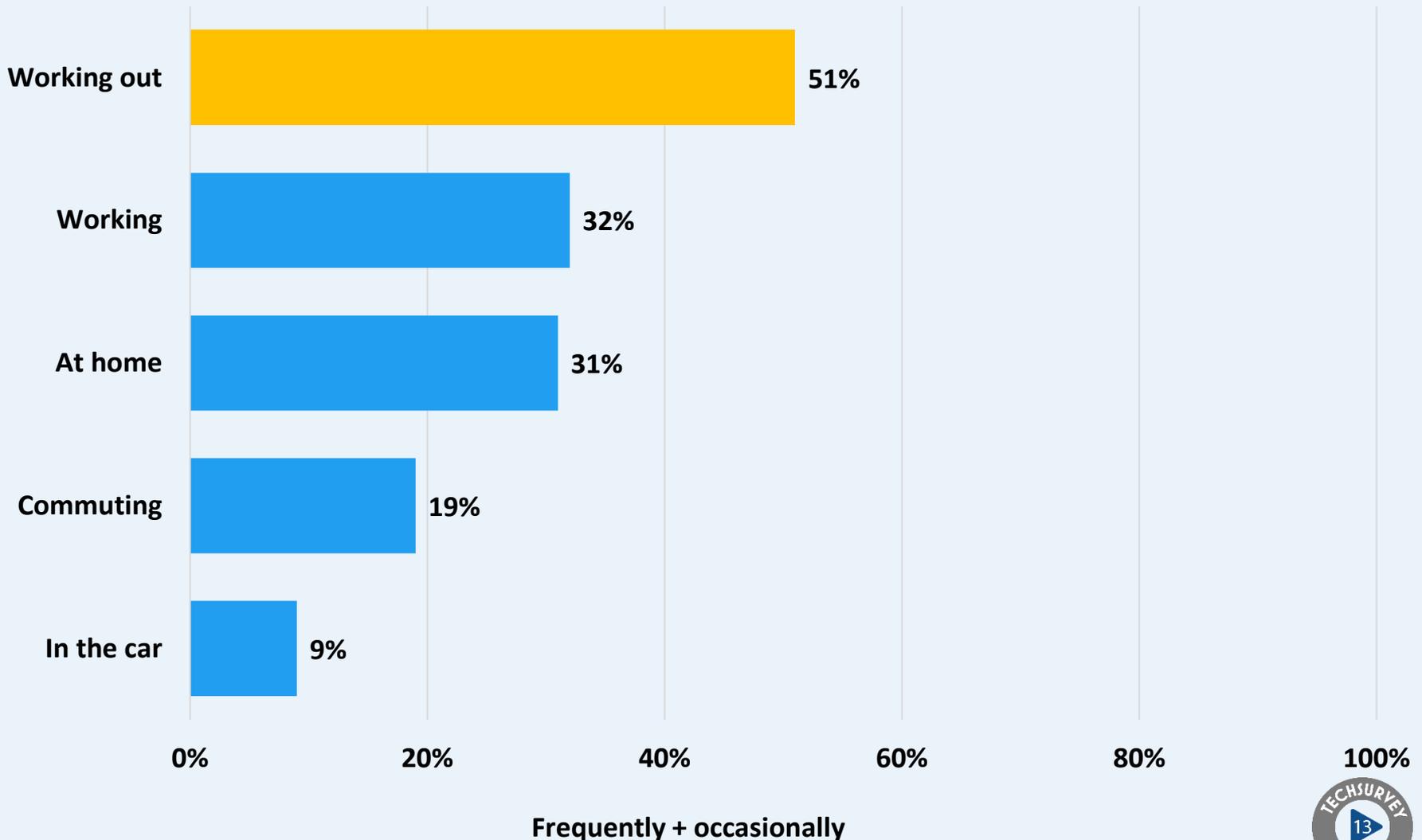


“How often do you use the built-in voice command feature on devices you own?”

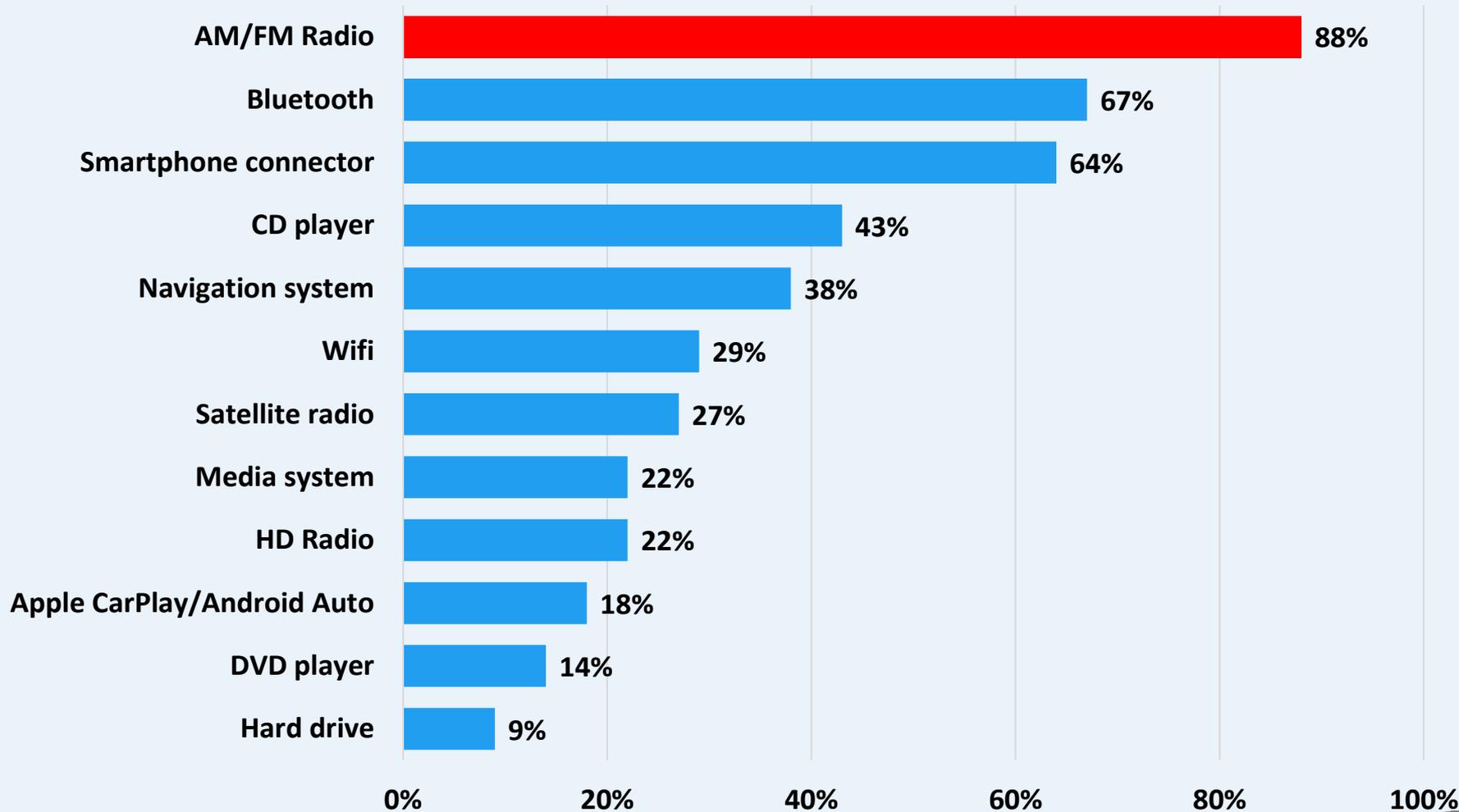
More than one in ten now owns an Amazon Echo or Google Home. They appeal to a wide range of consumers.



Headphone users are most often working out, working or hanging out at home.

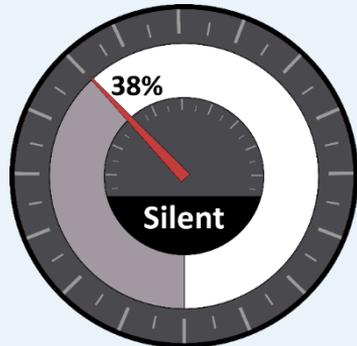
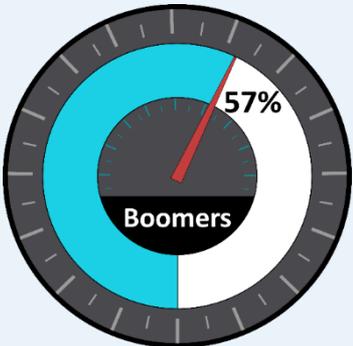
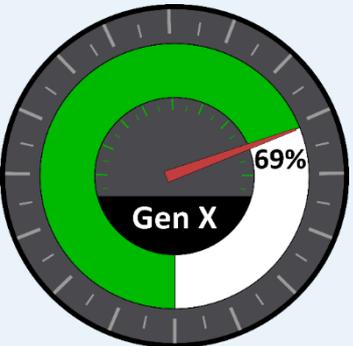
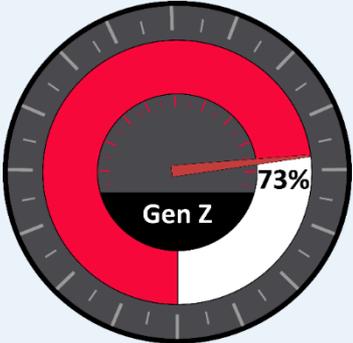
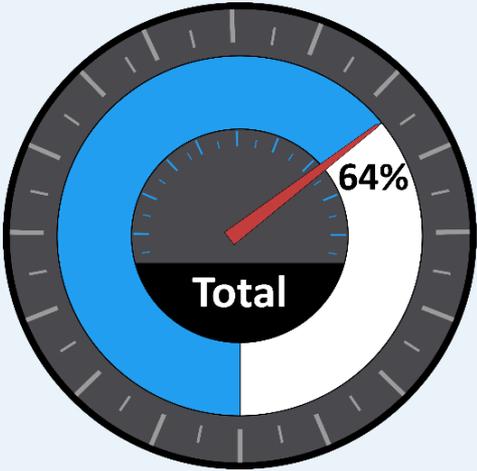


Nearly 9 in 10 of those in the new car market say its very important to have AM/FM radio, followed by Bluetooth & a smartphone connector.



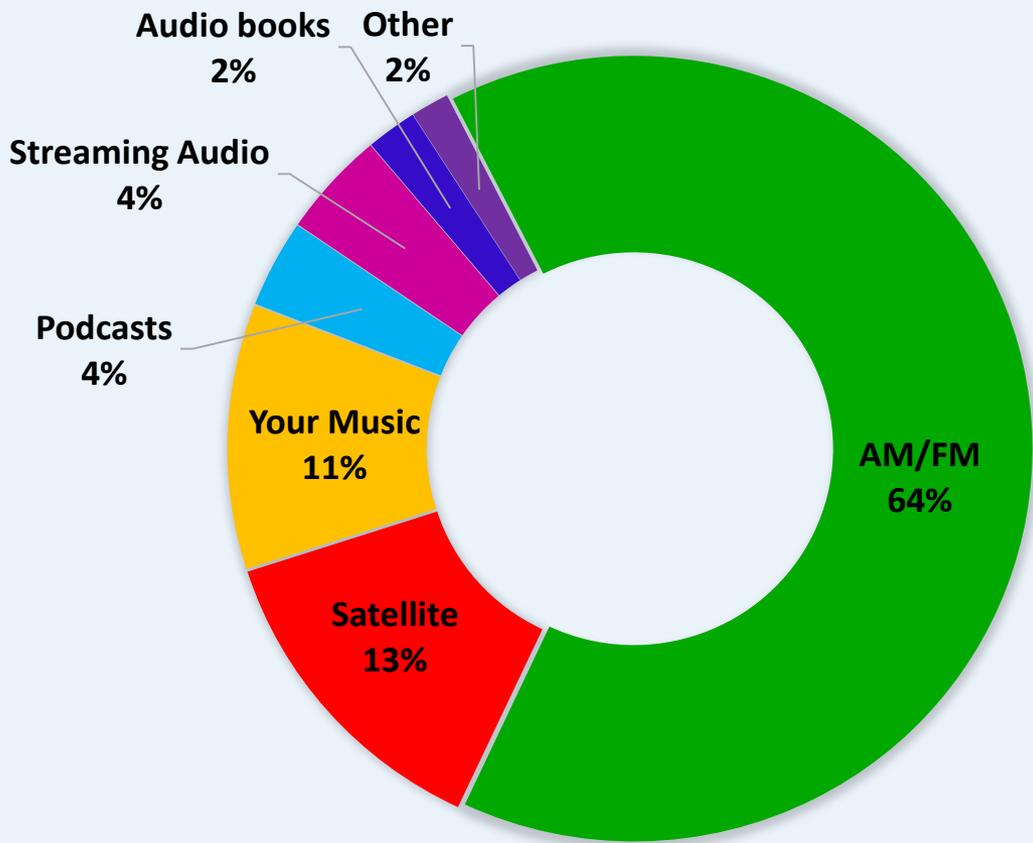
"Very Important" features among those planning on buying/leasing (or already bought) a new vehicle in 2017

More than 6 in 10 can connect a mobile phone/mp3 player in their cars, led by Millennials.



In the vehicle driven or ridden in most often

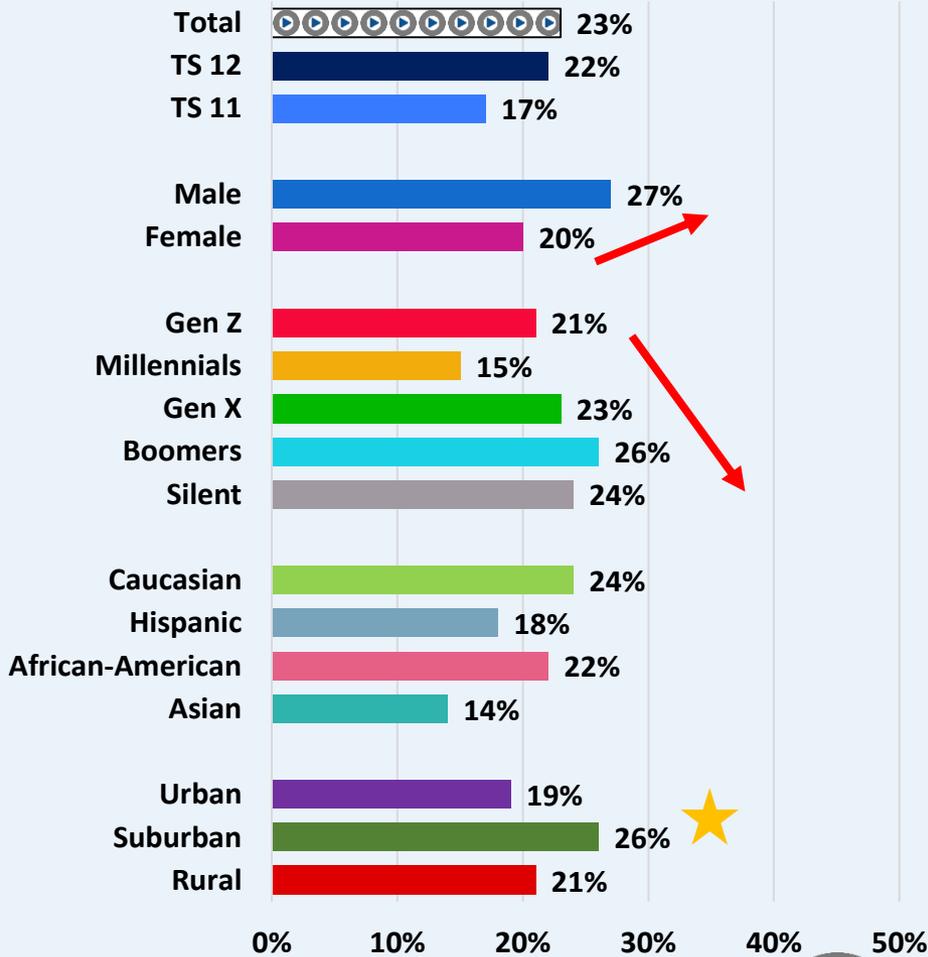
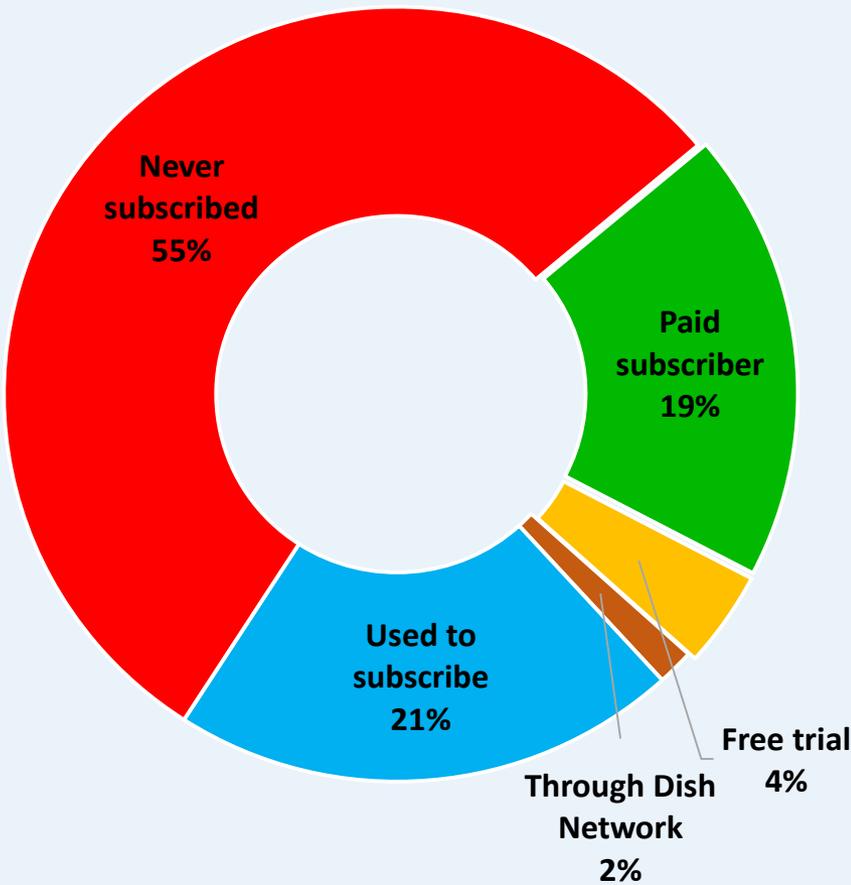
On a typical weekday, radio's share of in-car listening is 64%, followed distantly by satellite radio & personal music collections.



Percentage of time spent in a car with each source

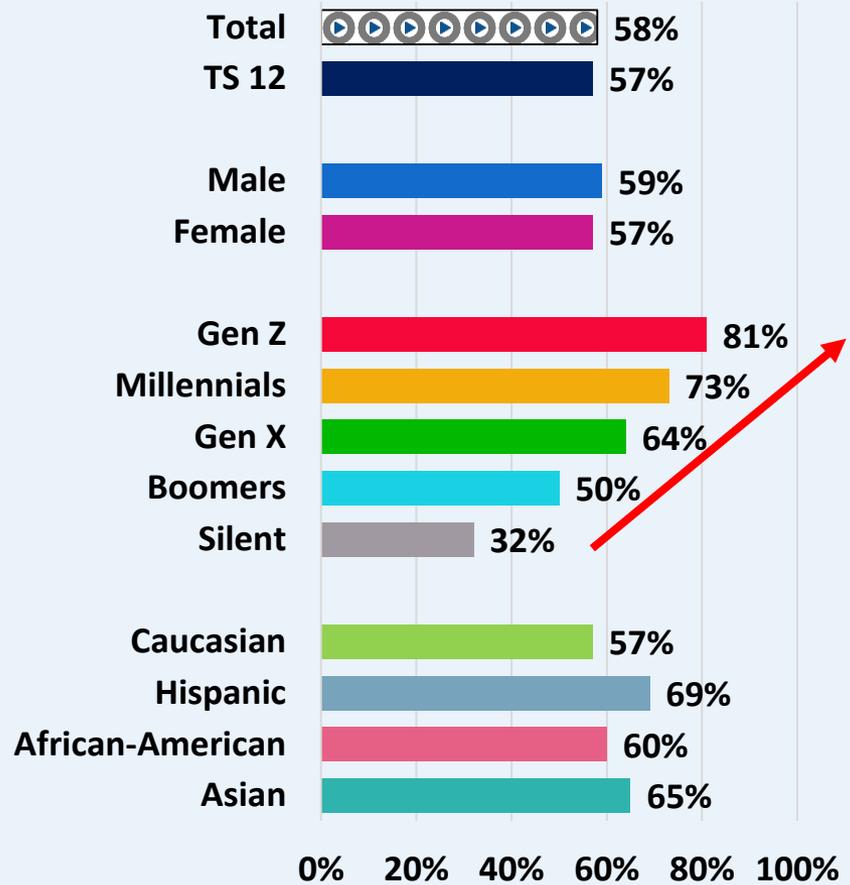
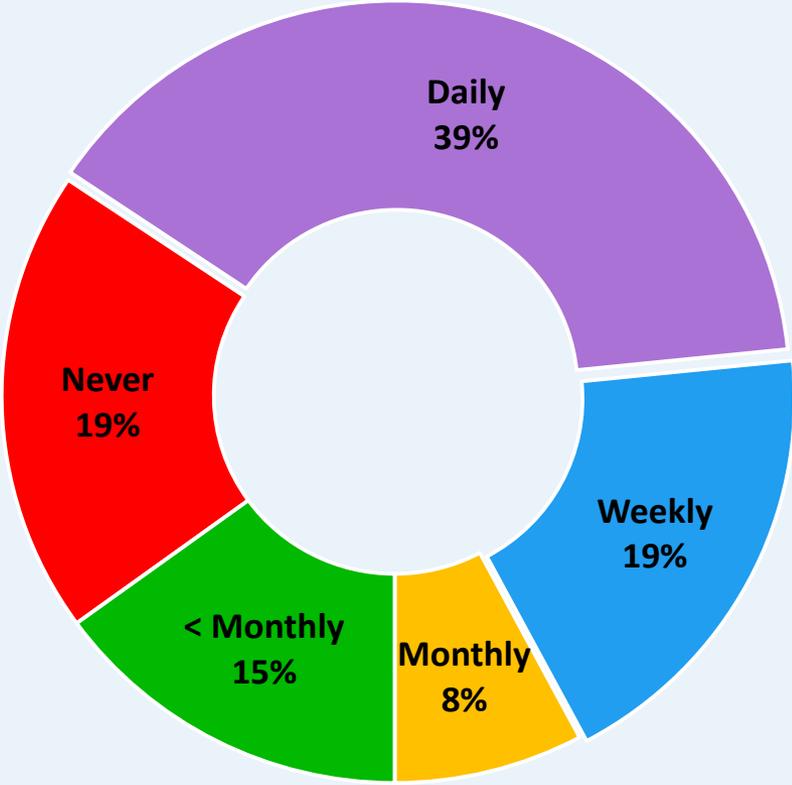
Satellite Radio is slowly growing in popularity driven mostly by men & older listeners.

Paid + Trial Subscribers

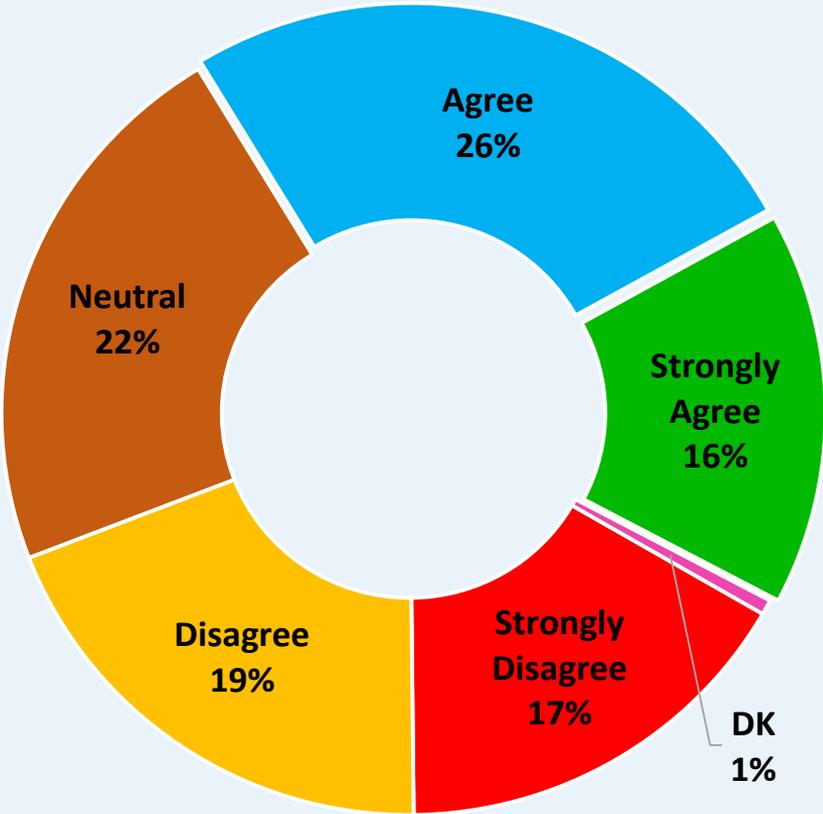


Nearly 6 in 10 stream audio at least weekly, especially progressively younger generations.

Weekly or more

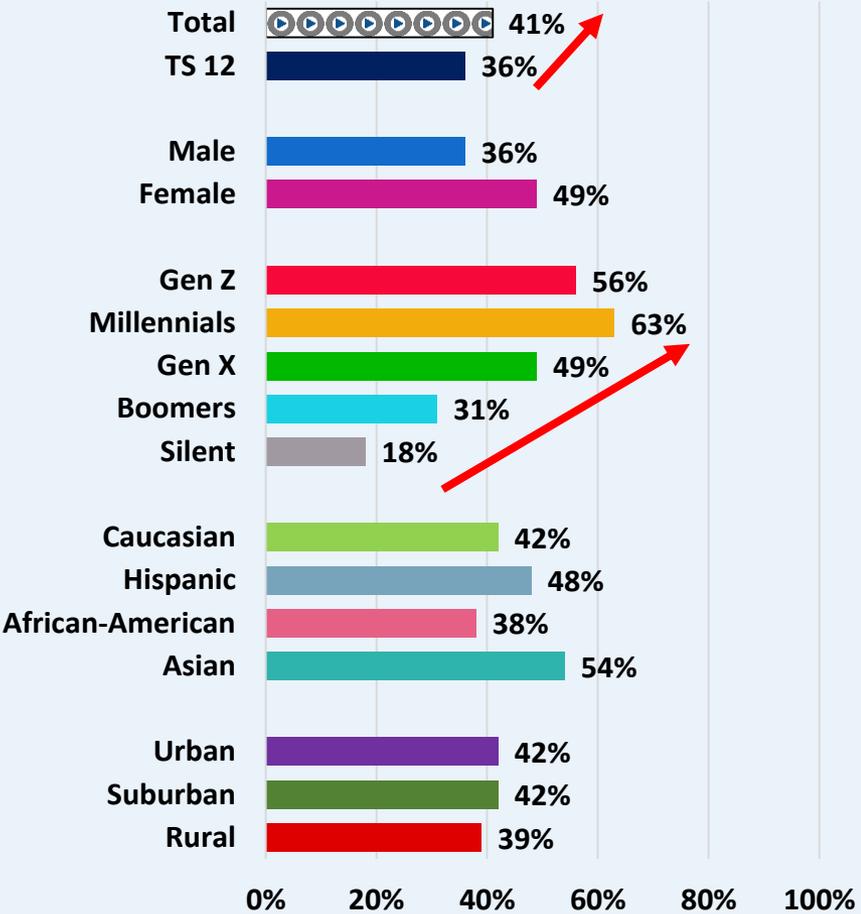


4 in 10 say they're addicted to their mobile phones, especially Millennials.

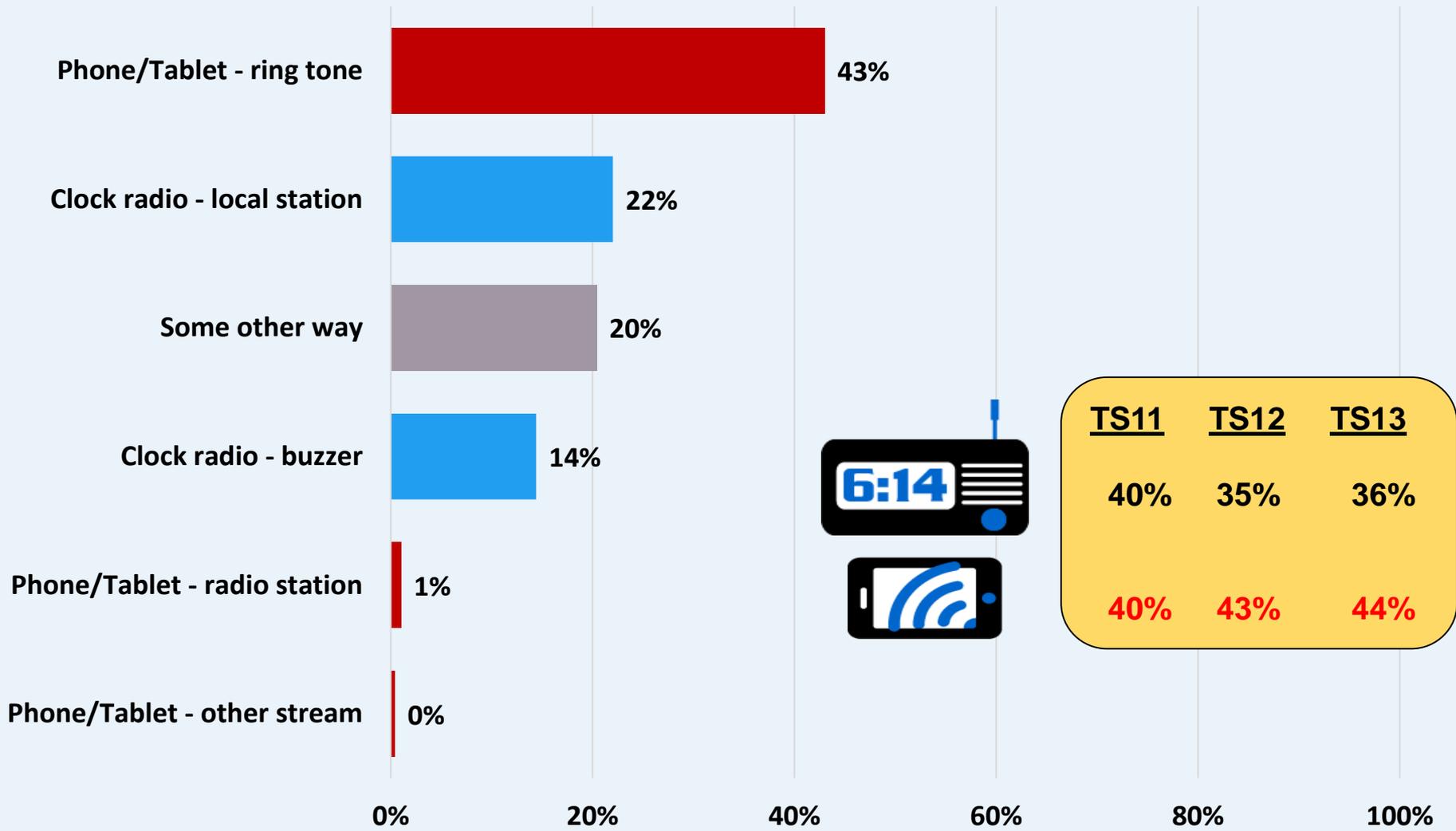


"I am addicted to my mobile phone"

Strongly Agree + Agree



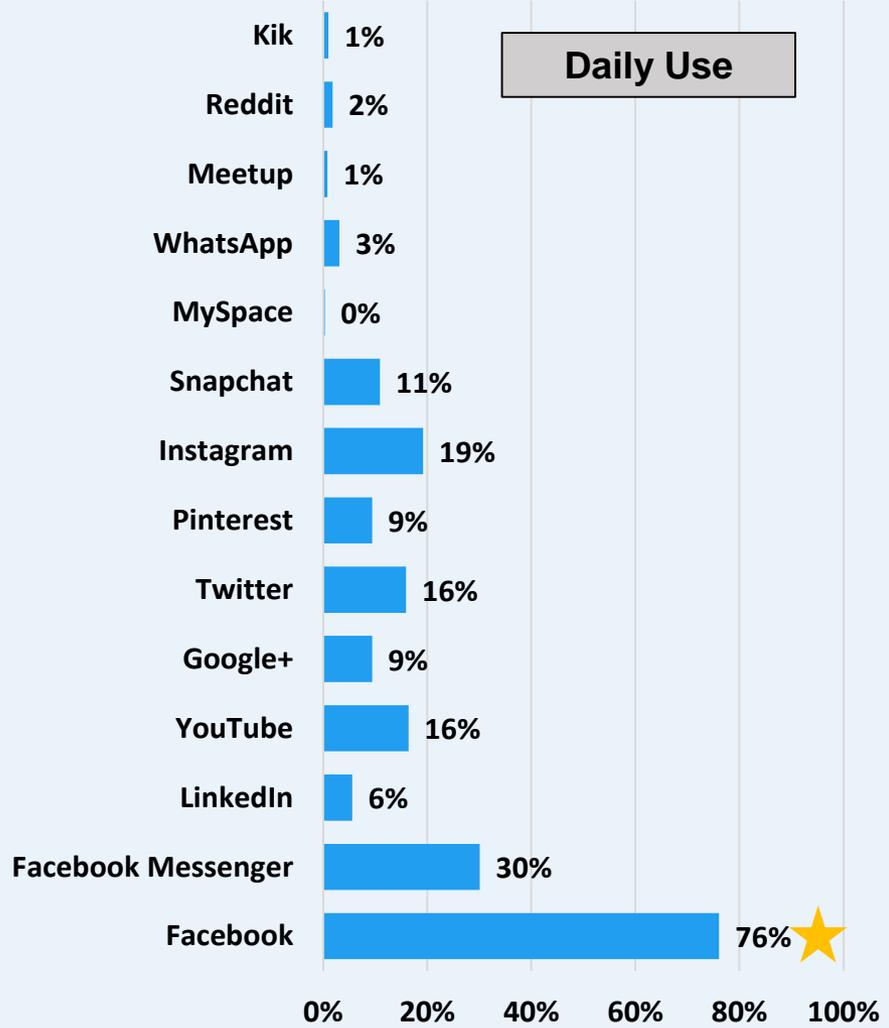
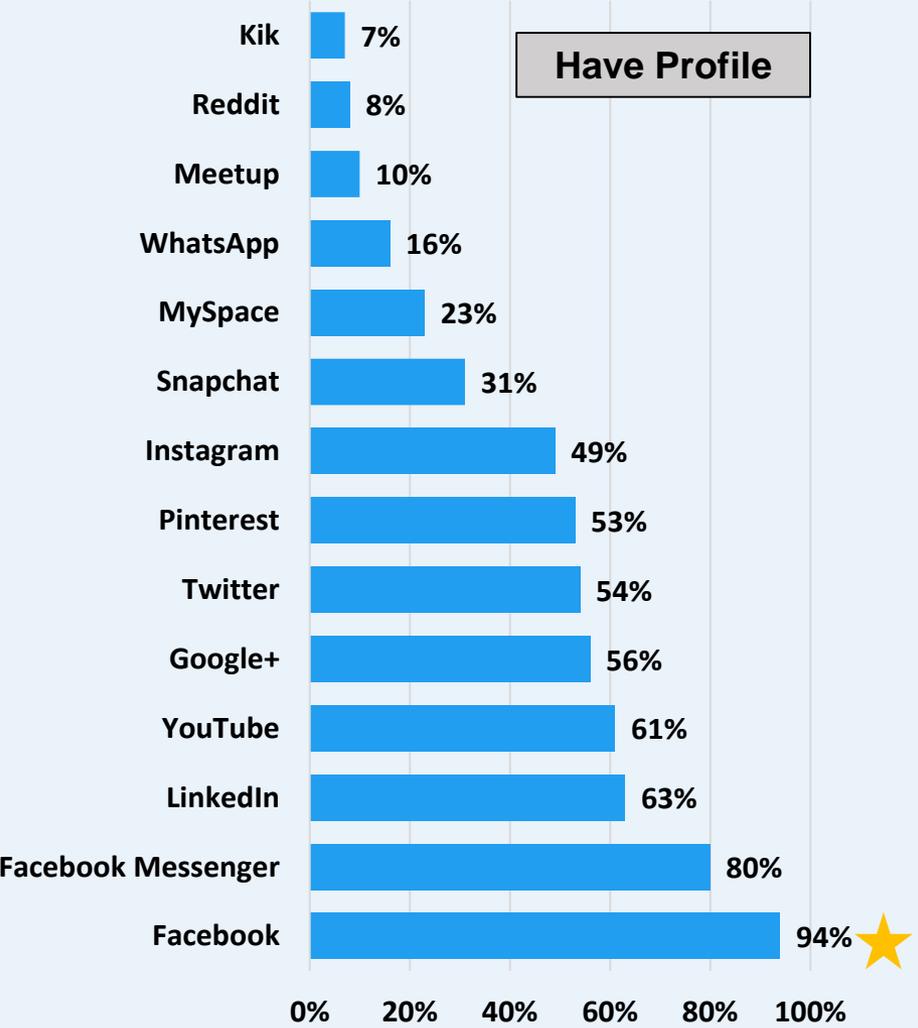
More people wake up to mobile phones than clock radios.



Among cell phone, smartphone or tablet owners



Facebook stands apart as the most popular social site with the most daily usage.

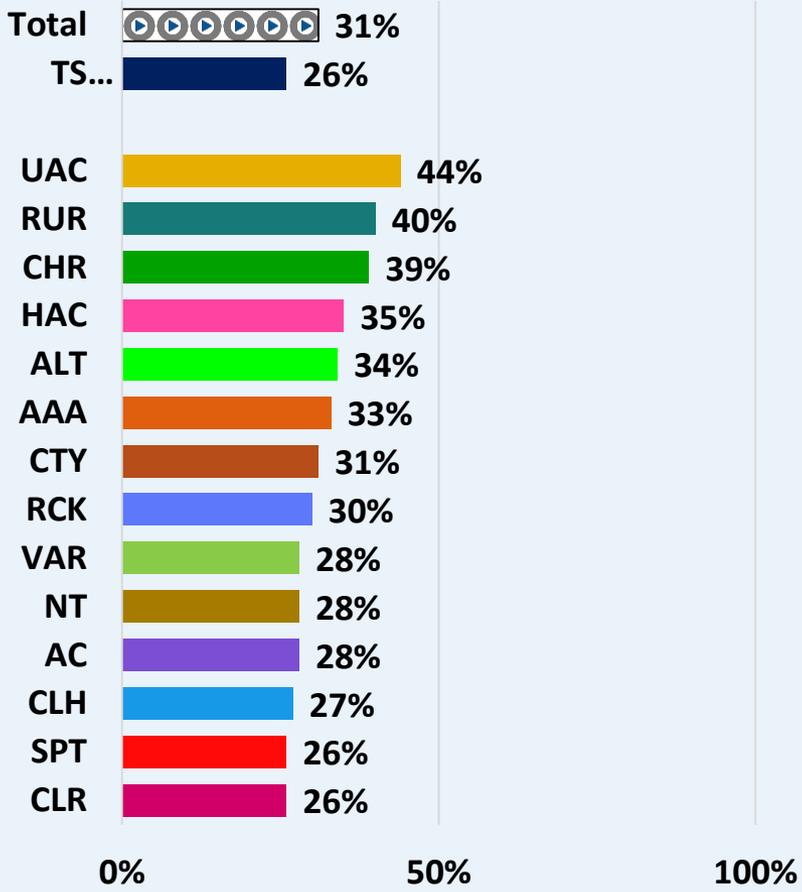
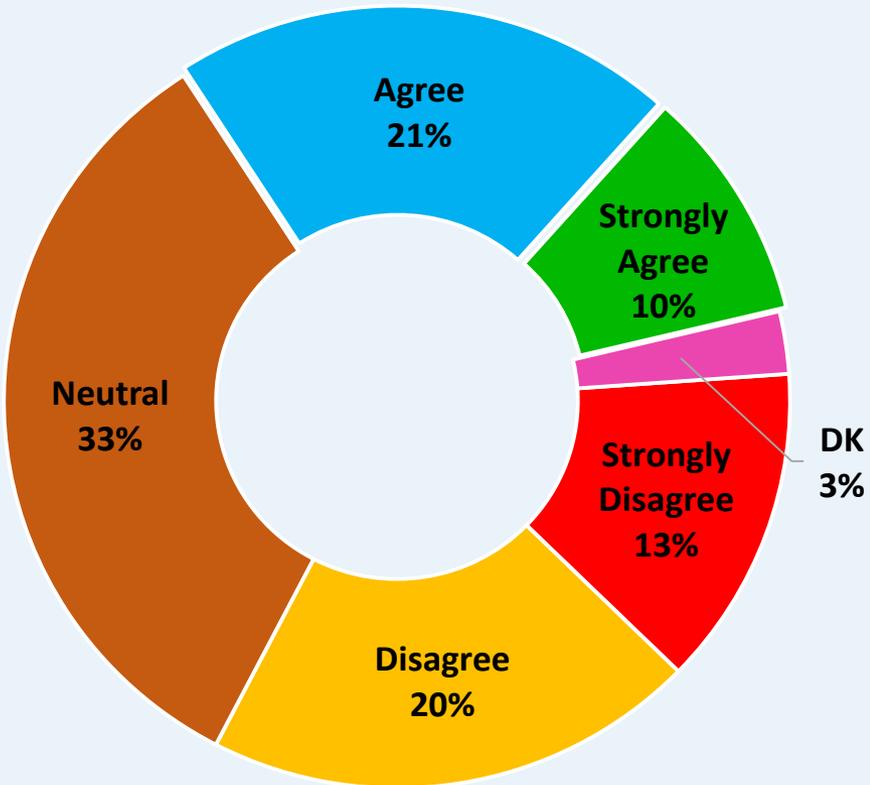


Left: Among those with a social media profile
 Right: Among those with a profile on each platform



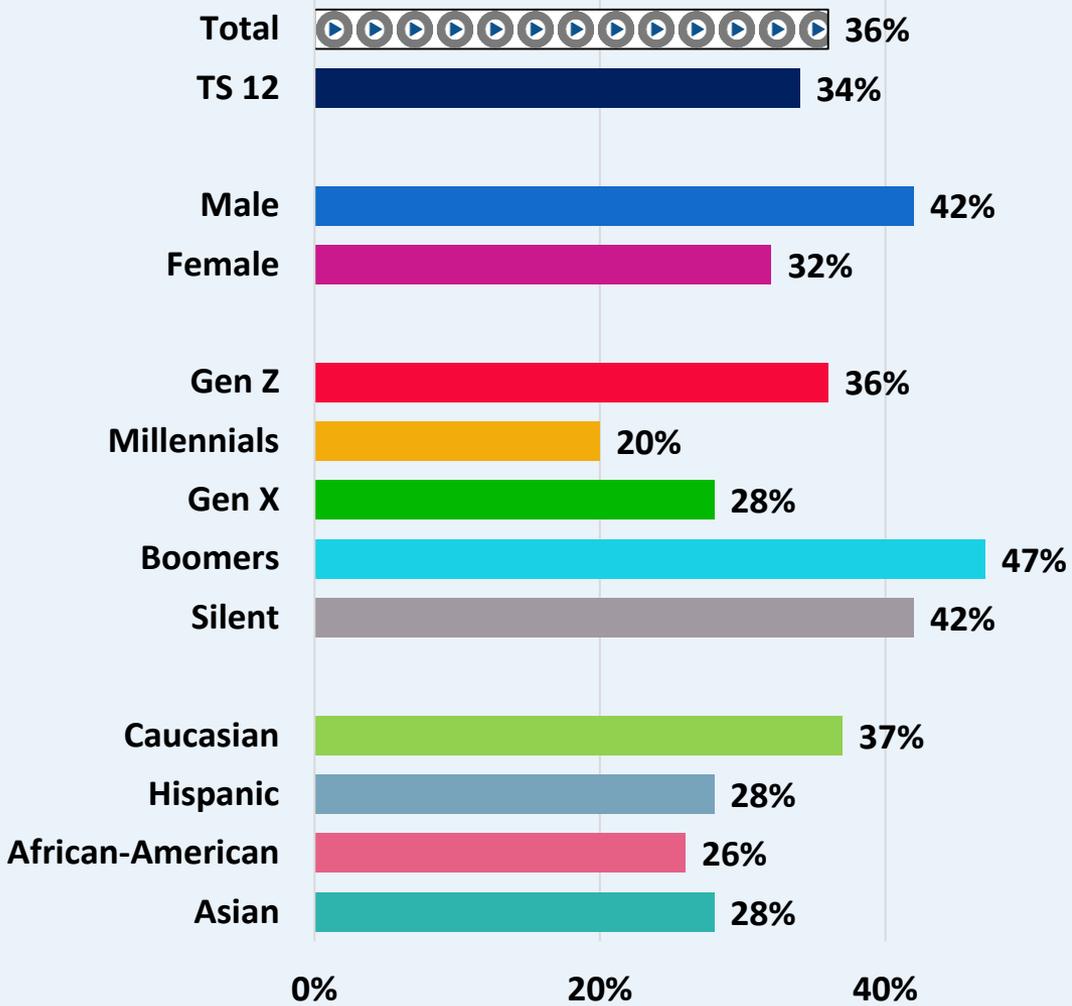
3 in 10 listen more to stations that interact with them socially, especially fans of Urban AC, Rhythmic CHR, & CHR.

Strongly Agree + Agree

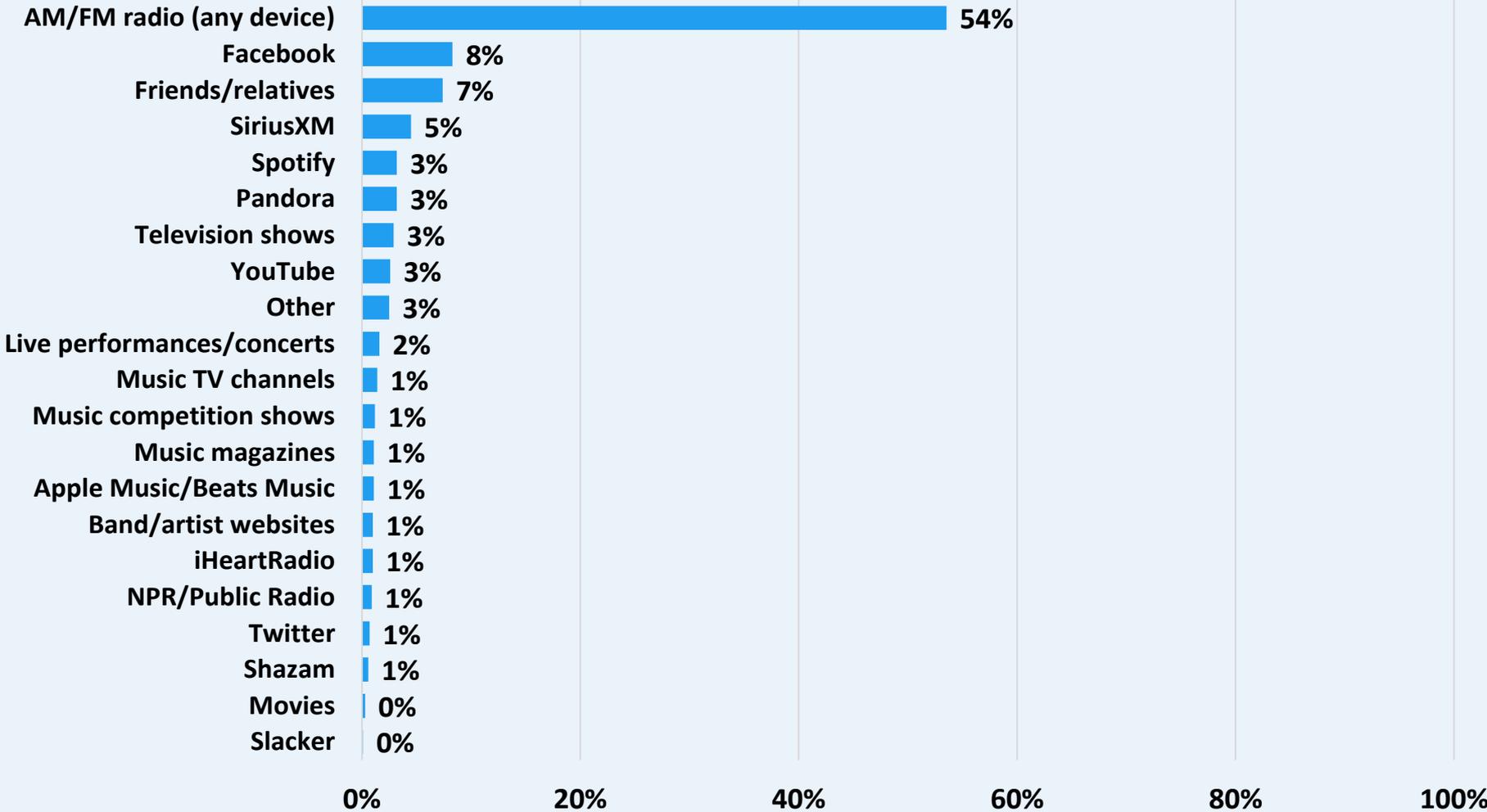


"I find myself listening more to stations that interact with me socially"

More than 1/3 own a turntable, especially Baby Boomers & men. But Millennials own them, too.



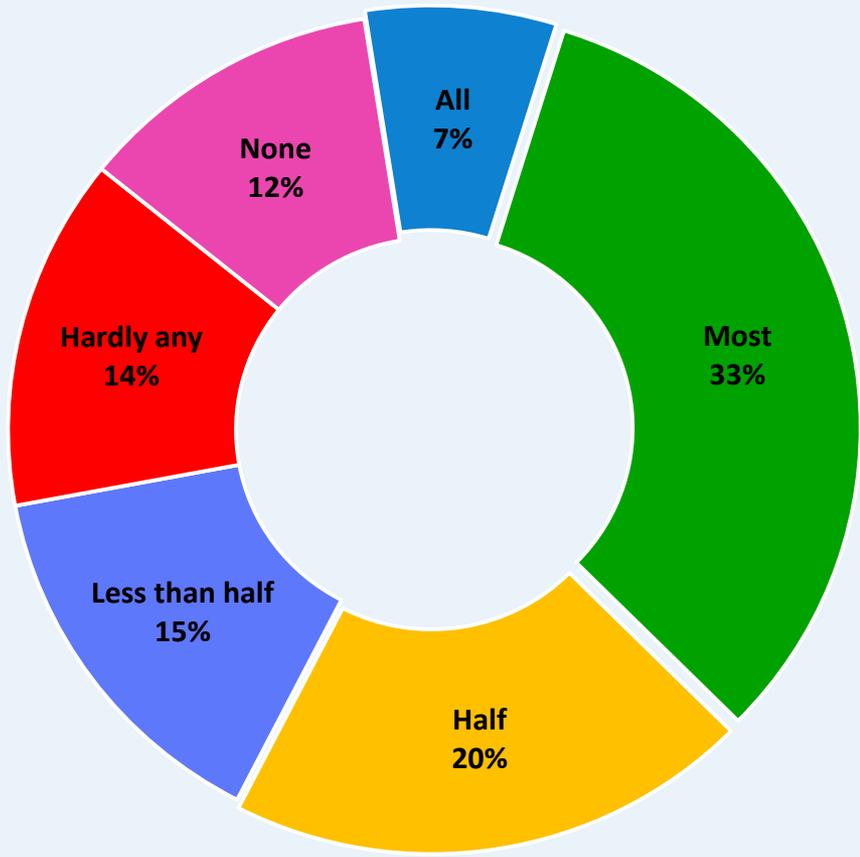
A majority discover new music on broadcast radio – nearly 7x higher than other platforms.



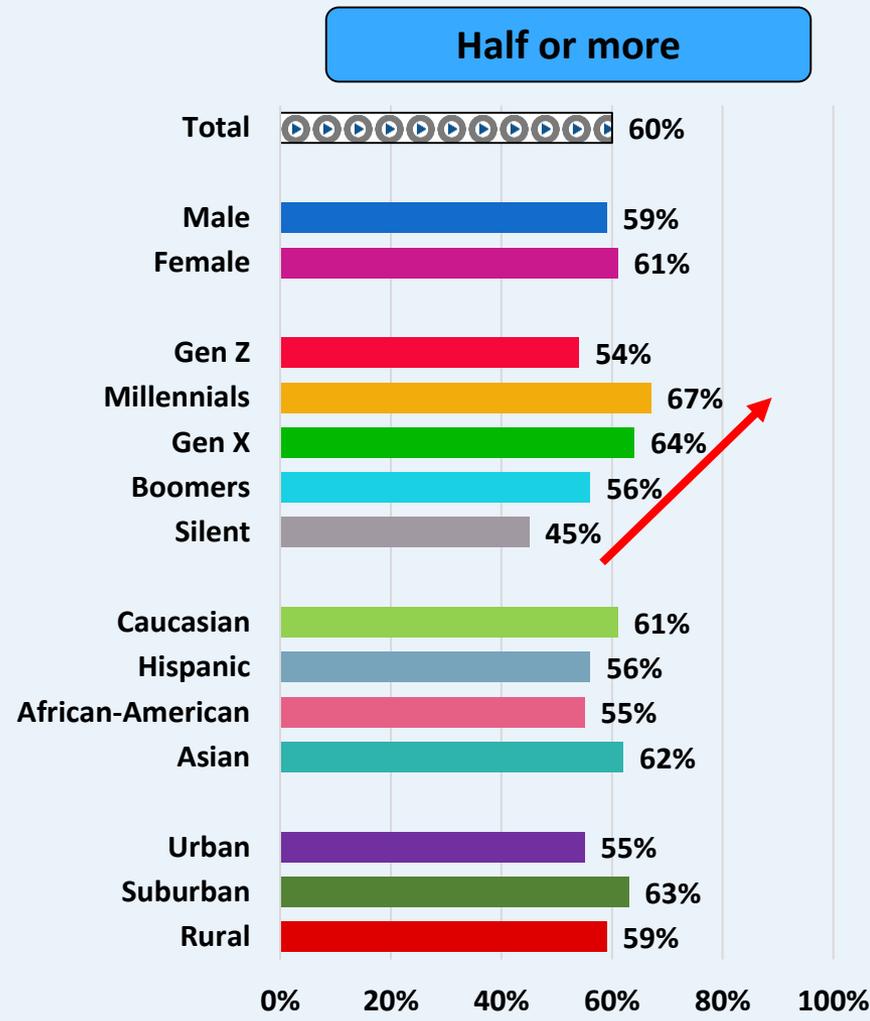
Among those interested in new music



6 in 10 say half or more of their gift shopping took place online last holiday season.



“During the holiday season, how much of your gift shopping was online?”





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