



TECHSURVEY 2019 JACOBS MEDIA

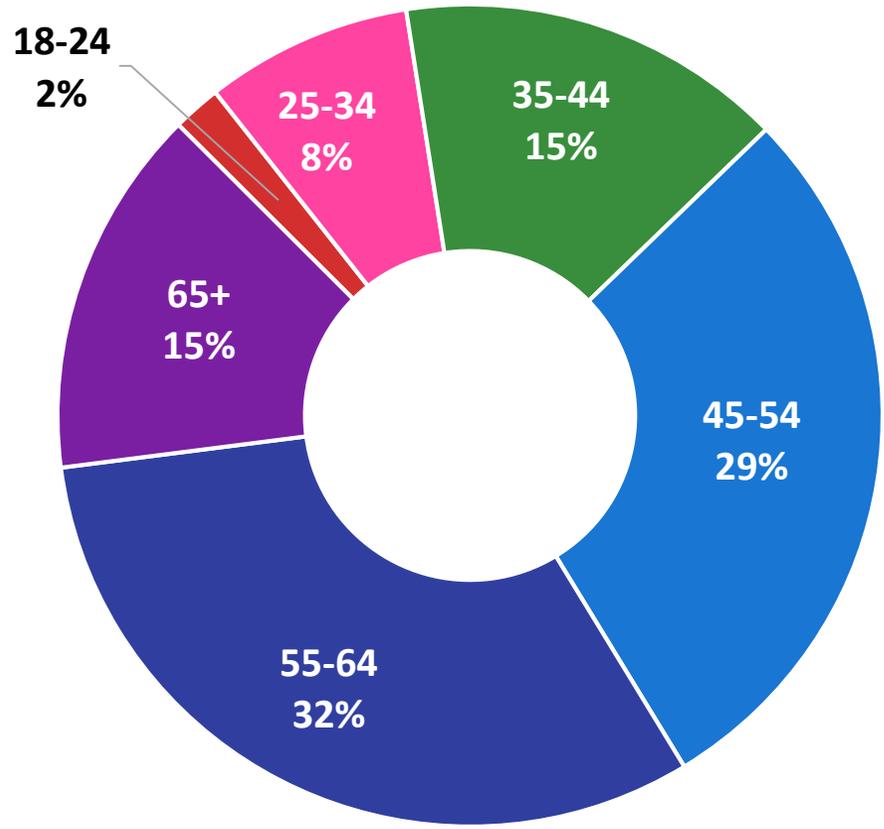
Radio's Survival Kit

Methodology

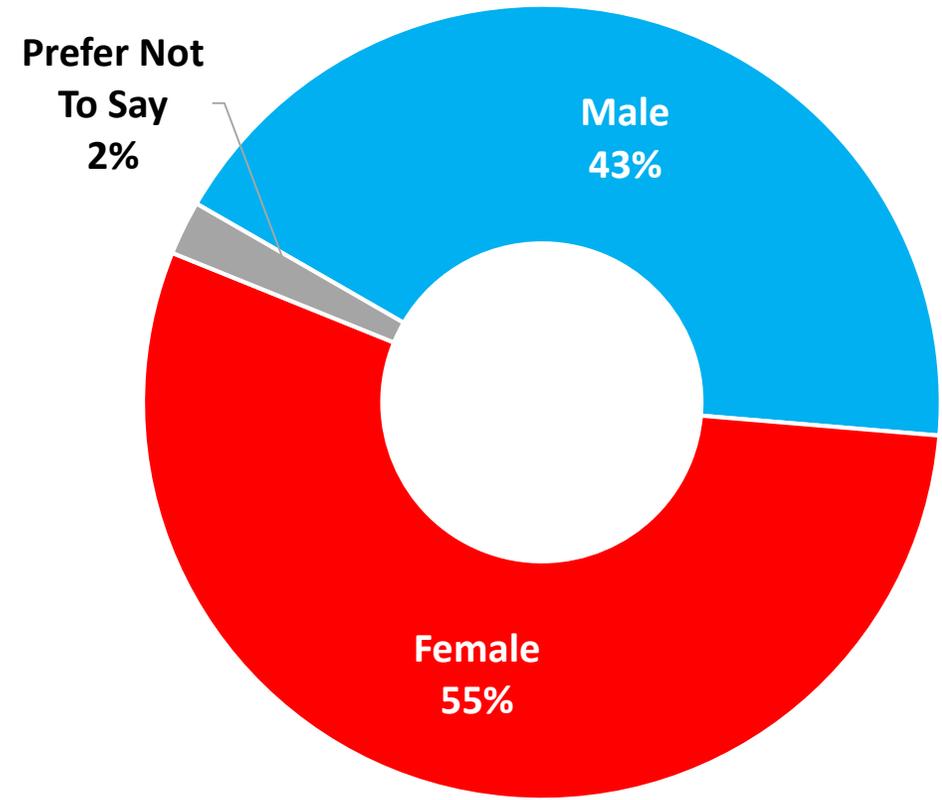
- 519 radio stations in the U.S. & Canada
- N = 50,652
- Interview dates: January 3 - February 3, 2019
- Most respondents are members of station databases. Some responses were gathered via station websites and/or social networking pages.
- All responses were collected online and weighted using Nielsen 2018 market populations data.
- This is a web survey and does not represent all radio listeners or even each station's audience. It is not stratified to the U.S./Canadian populations. Respondents are, by and large, commercial radio users.

Demographics

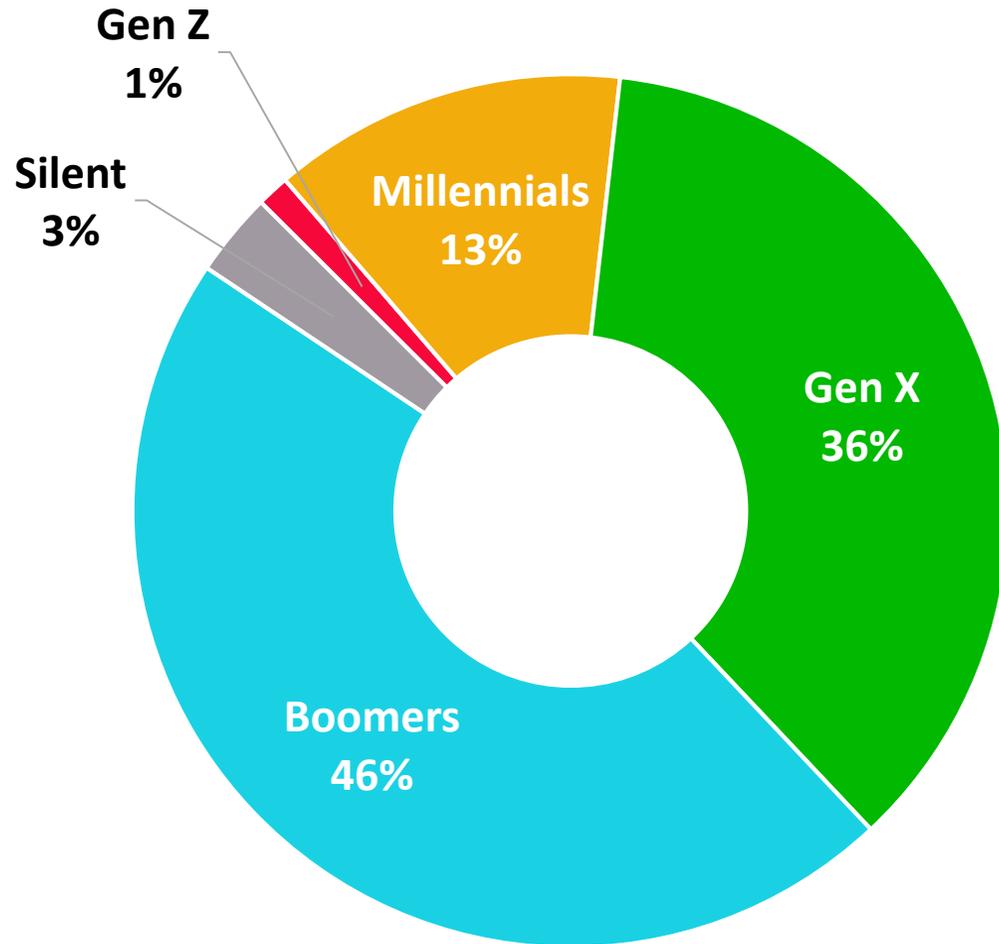
Age



Gender



Generations



Gen Z (born after 1996)

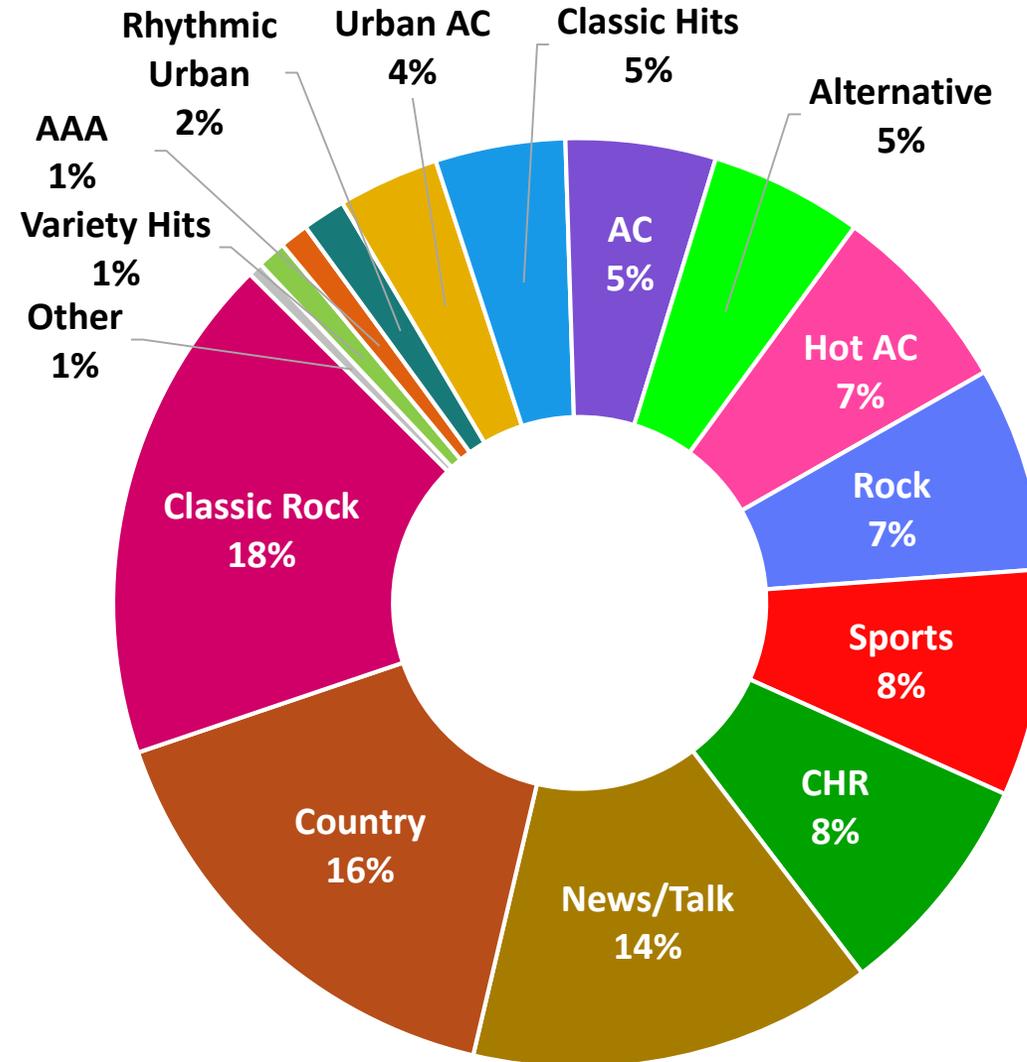
Millennials (born between 1981-1996)

Gen X (born between 1965-1980)

Baby Boomer (born between 1946-64)

Silent Generation (born before 1946)

Format Composition

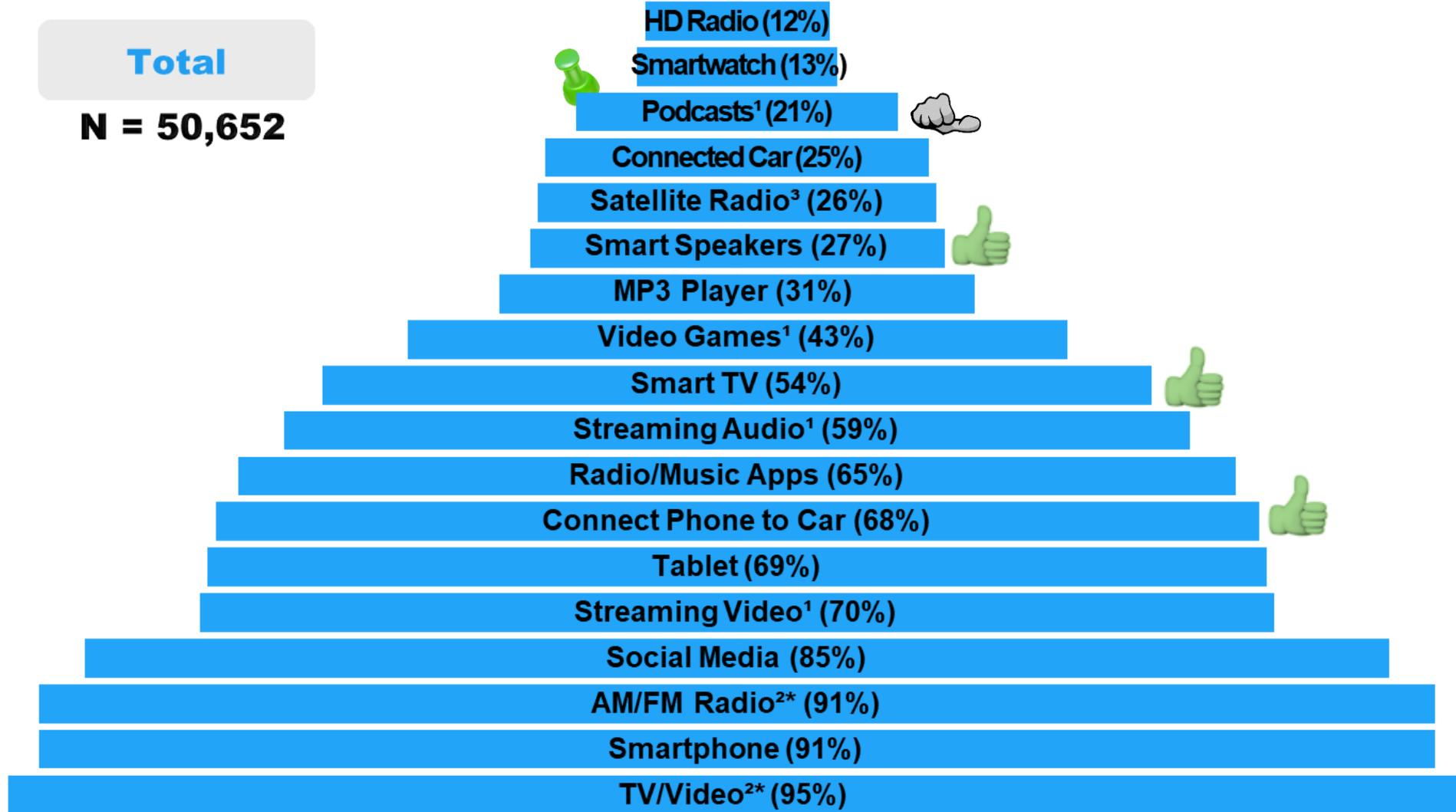




Media Pyramid 2019

Total

N = 50,652



Total TS 2018
13%
11%
23%
24%
25%
21%
35%
44%
51%
61%
66%
65%
70%
69%
86%
92%
90%
95%

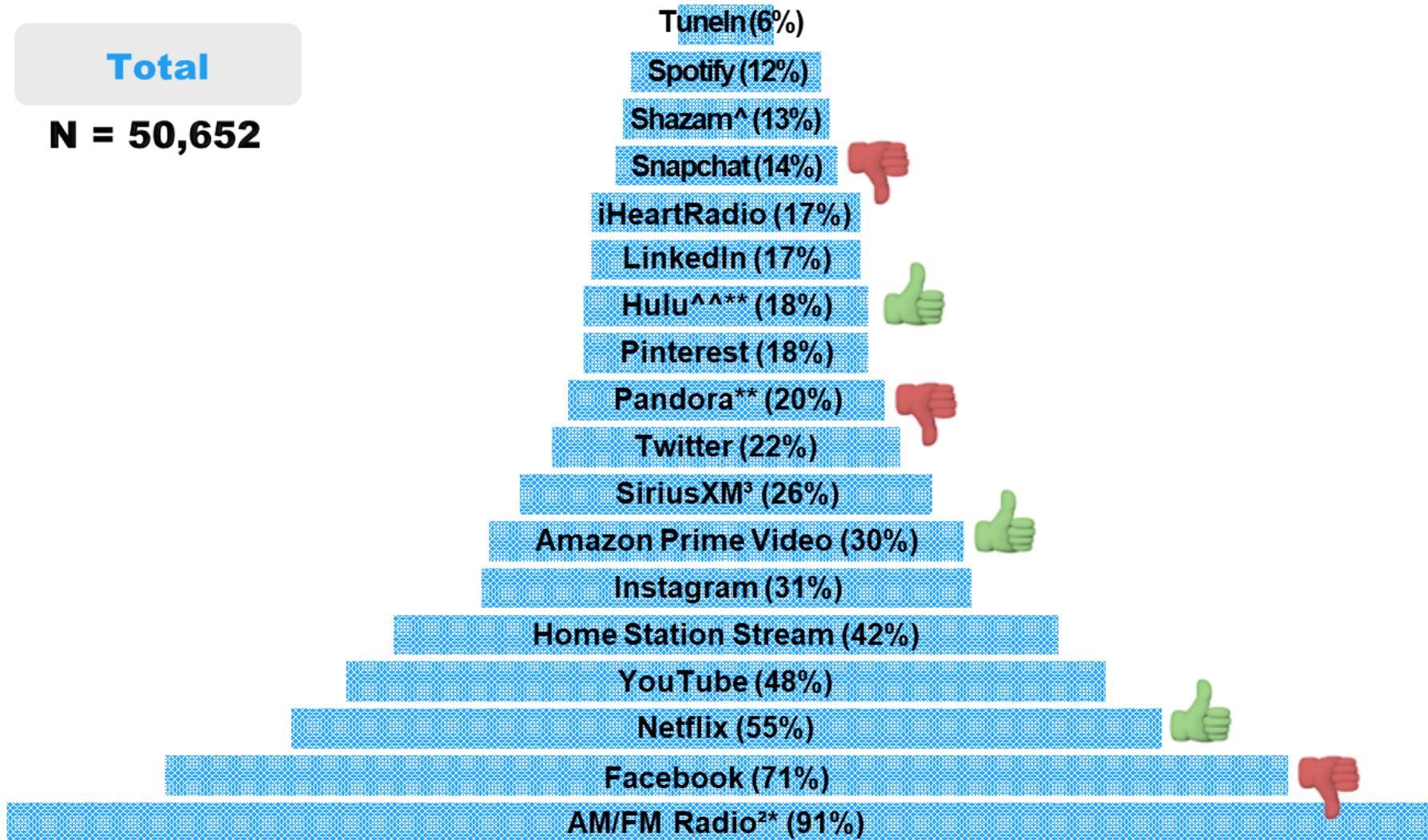
¹ Weekly or more ² 1+ hour per day ³ Paid & trial users * Any platform/device



Brand Pyramid 2019

Total

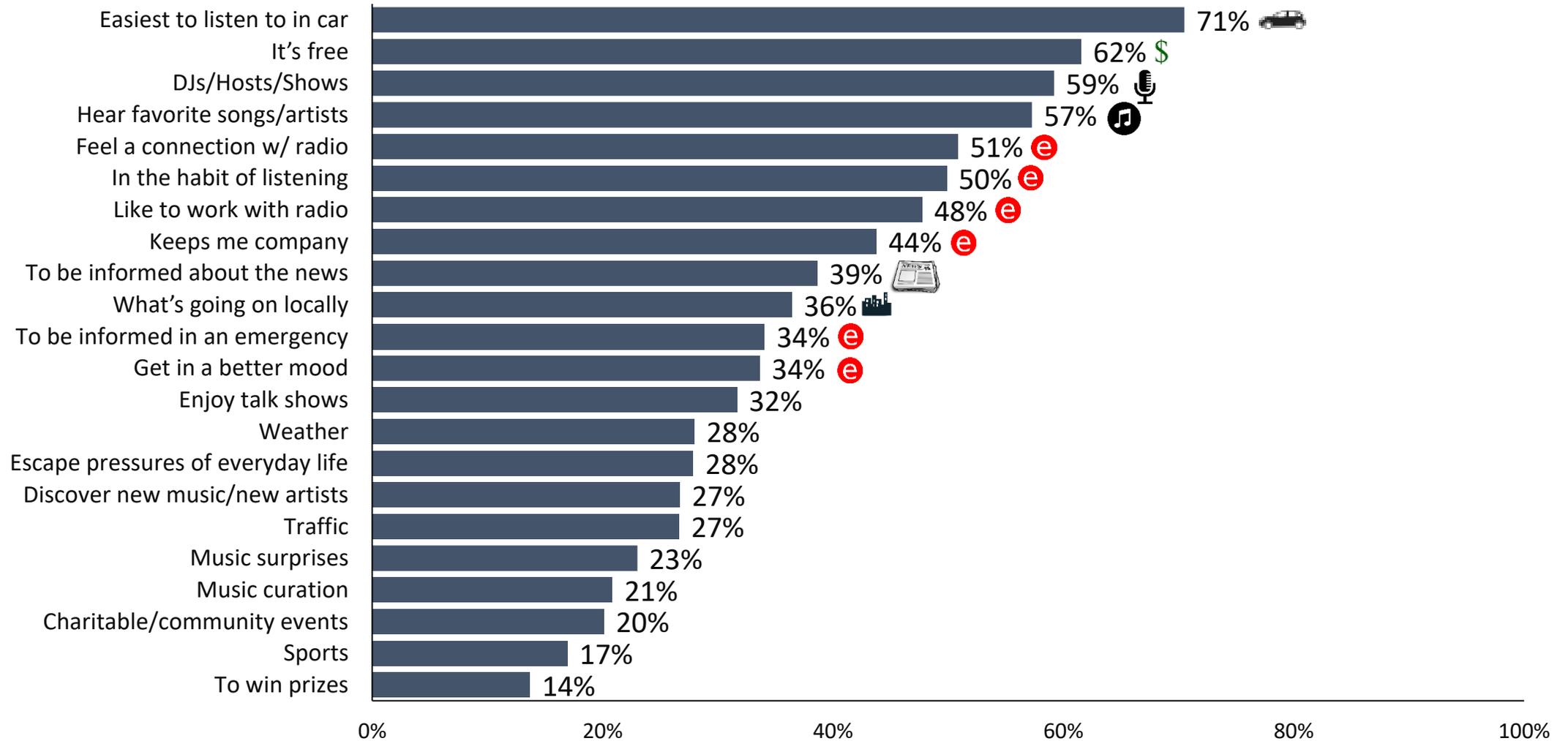
N = 50,652



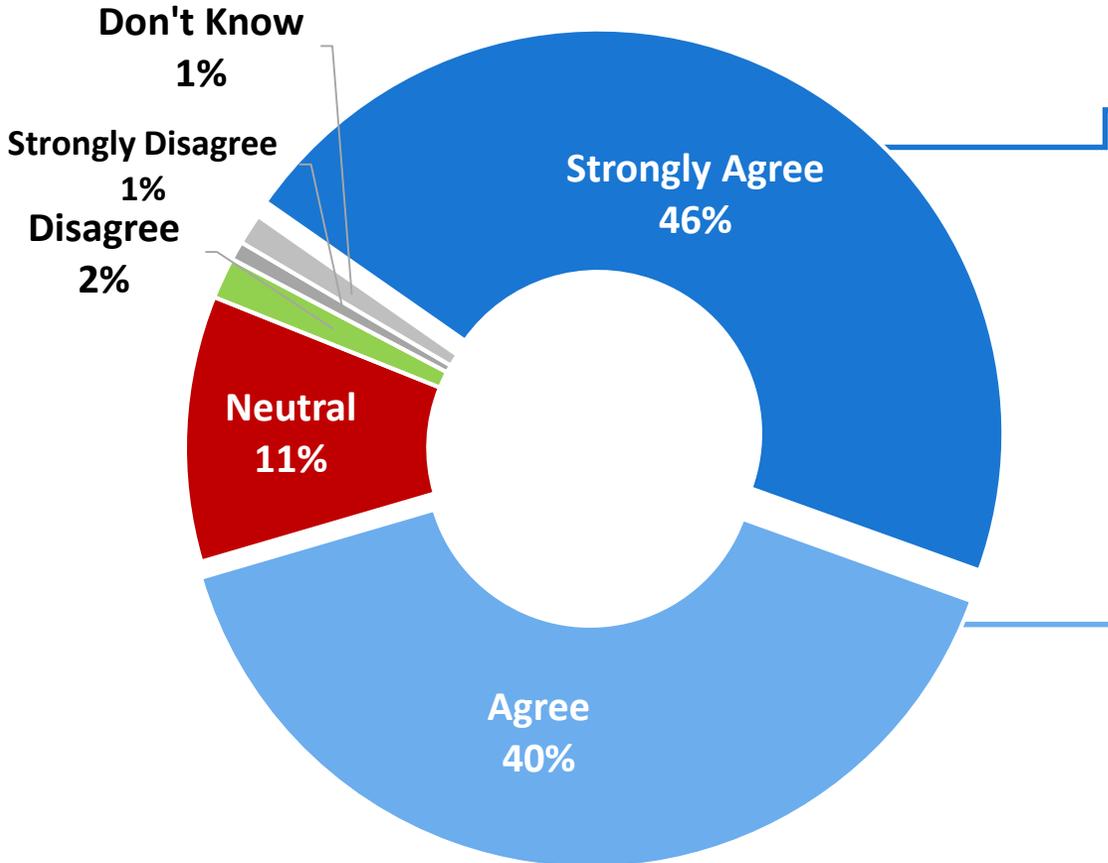
Total TS 2018
6%
13%
14%
17%
18%
18%
14%
21%
25%
22%
25%
24%
30%
44%
50%
52%
74%
92%

All weekly use unless noted ² 1+ hour per day ³ Paid & trial users *Any Platform/Device **Excluding Canada ^Downloaded ^^Includes Live TV

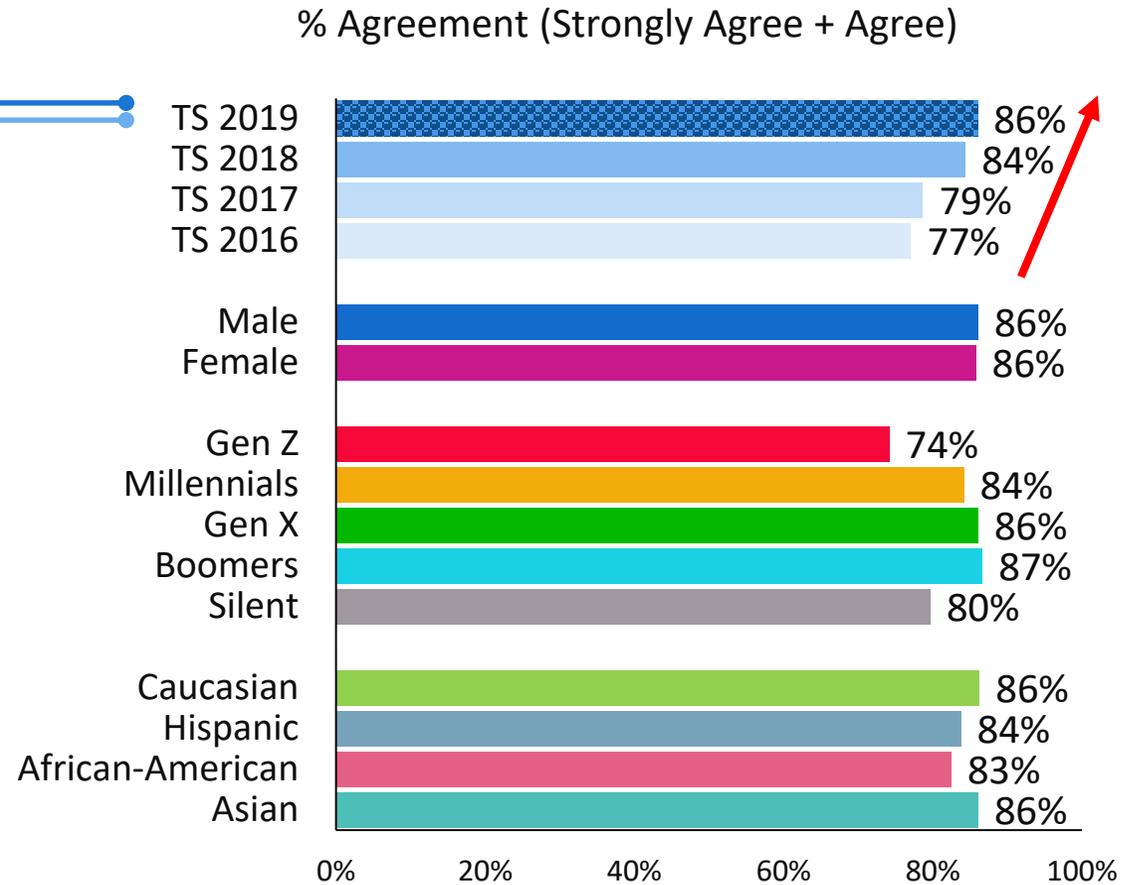
Why AM/FM Radio? Music & Personalities, But Also Easy to Listen to In-Car, Free and Powerful Emotional Benefits



Radio's Local Orientation Is Increasingly Seen As the Medium's Primary Advantage

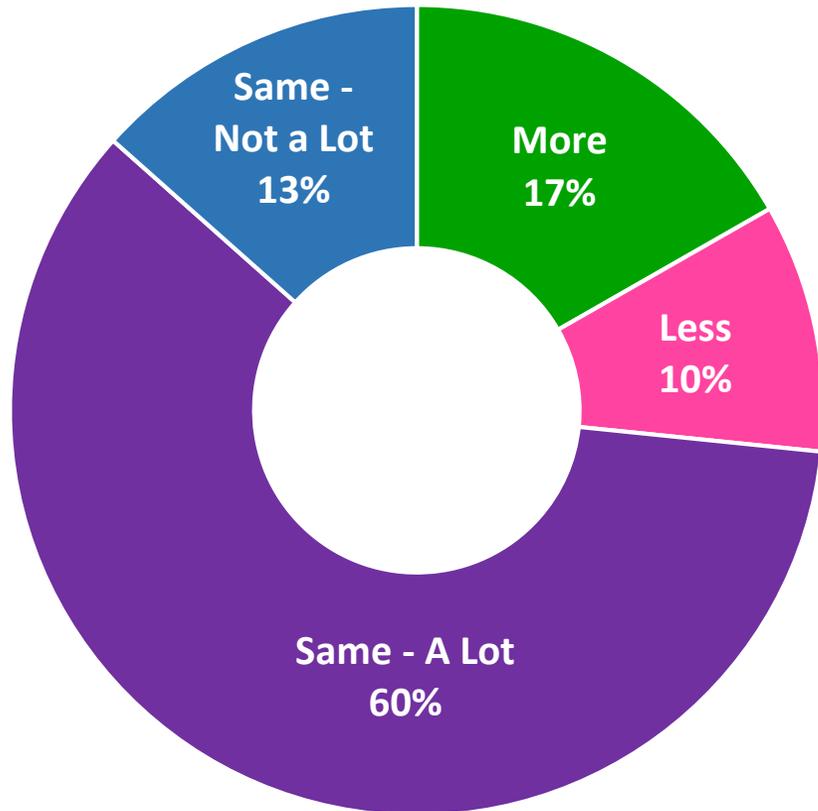


"One of radio's primary advantages is its local feel"

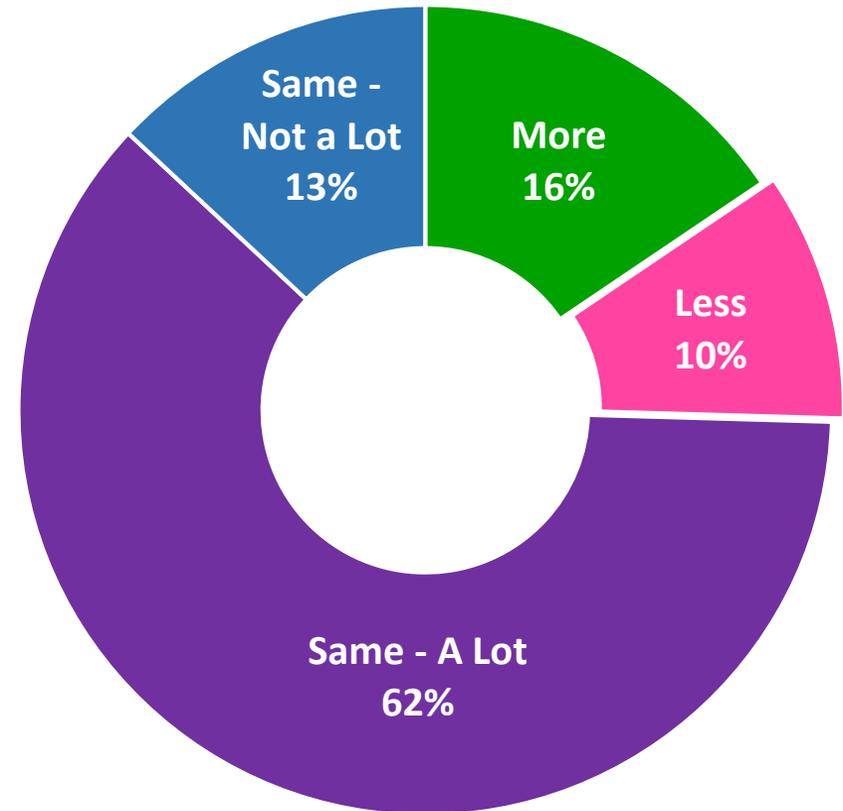


Past Year AM/FM Radio Listening Momentum Remains Strong

TS 2018

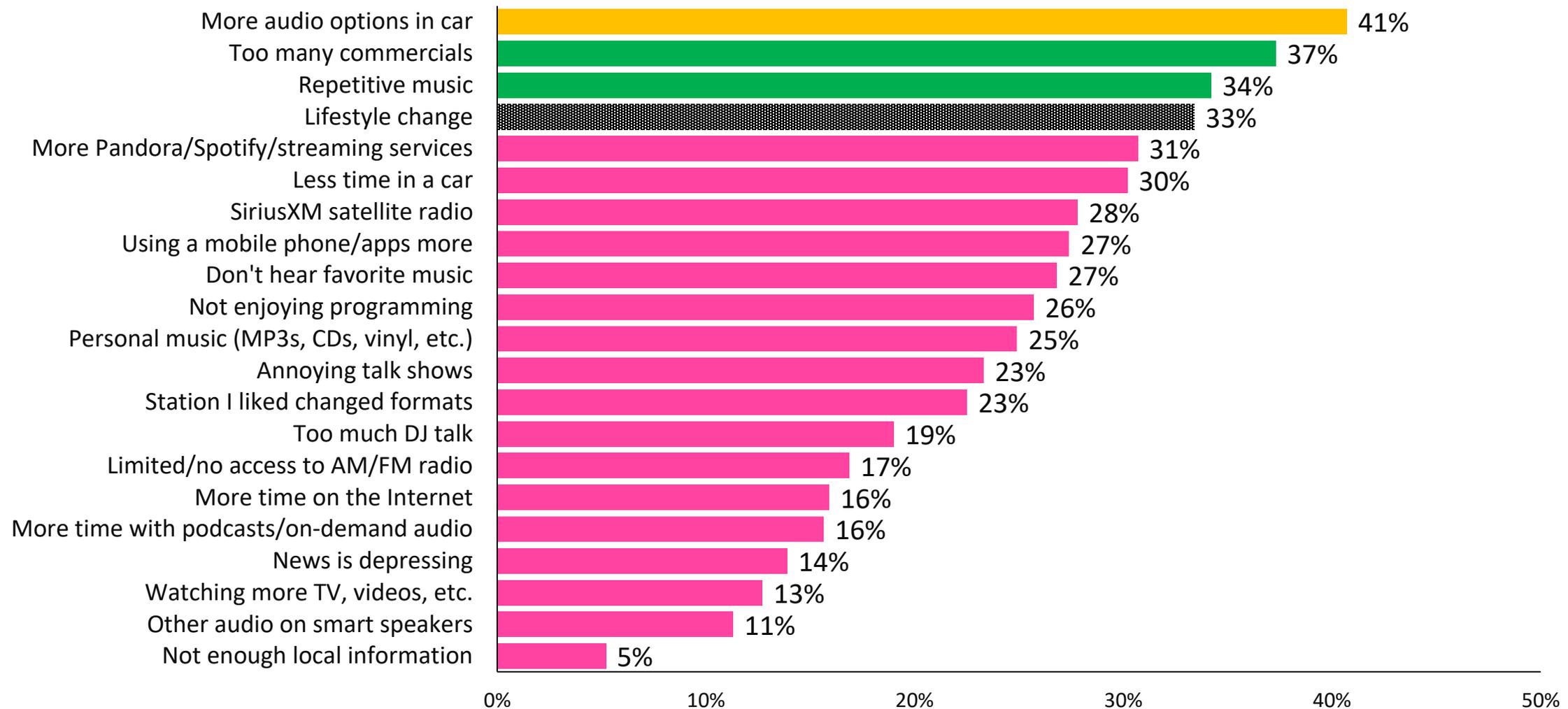


TS 2019



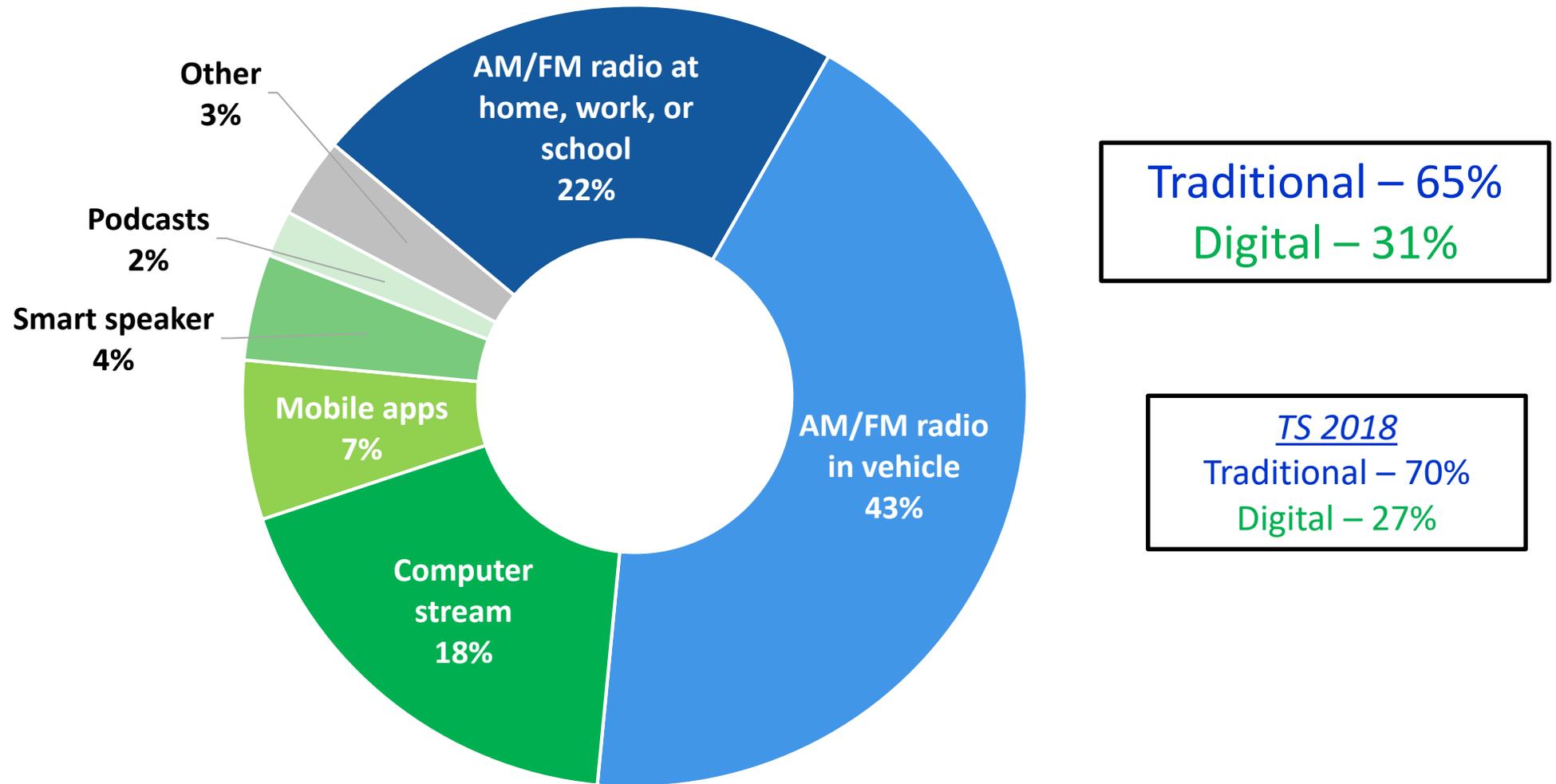
Among those who listen to AM/FM radio

More Audio Options in the Car, and Music Streaming Services (Pandora, Spotify, Etc.) Are the Main External Reasons for Listening Less to AM/FM Radio

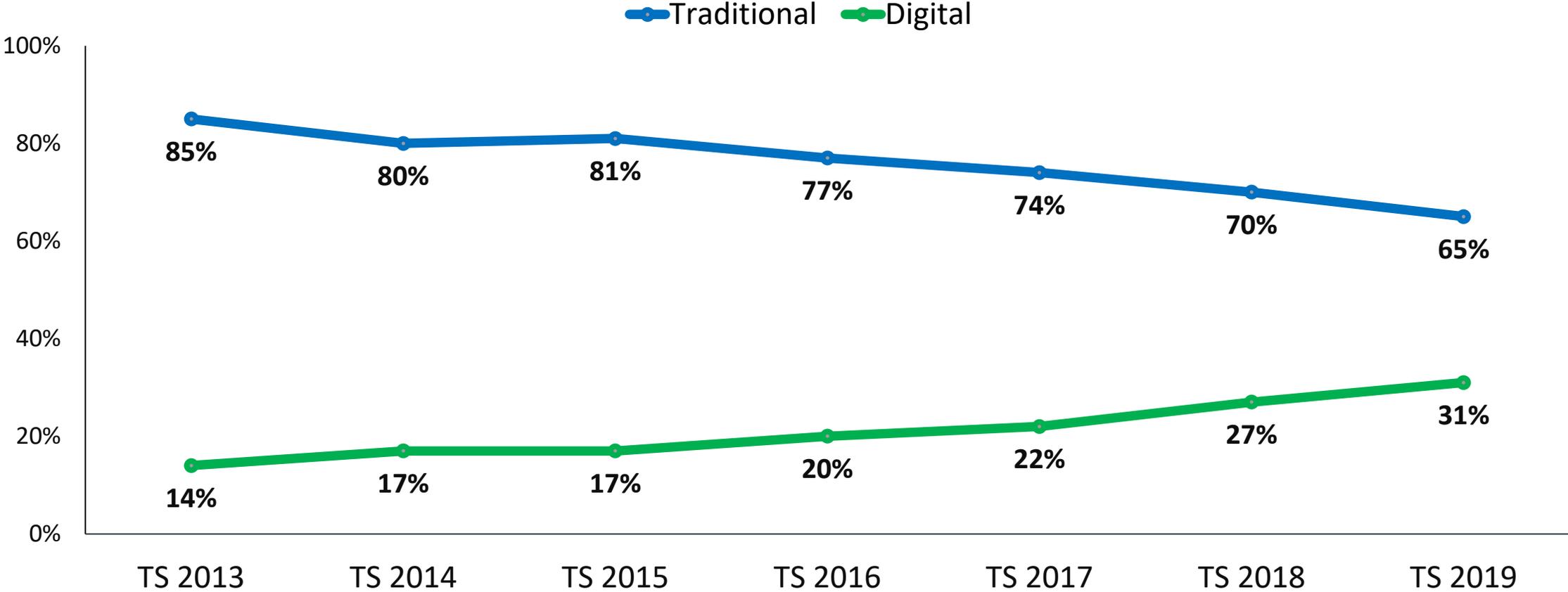


Among those who say they are listening less to AM/FM radio in the past year, % who say this is a main reason they listen less

In-Car Listening on a Regular Radio Dominates Home Station Listening; Digital Listening Overall Continues to Rise

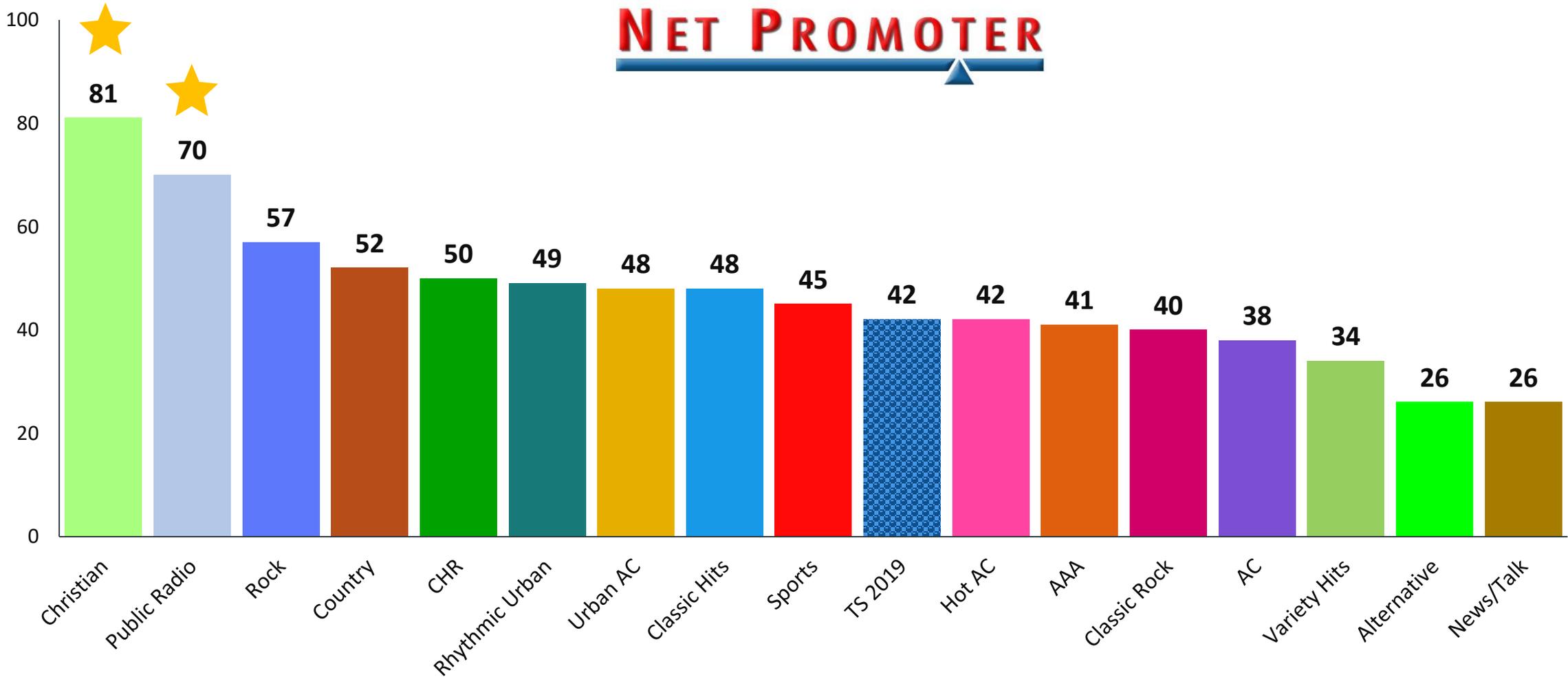


Home Station Listening Platform: Traditional vs. Digital

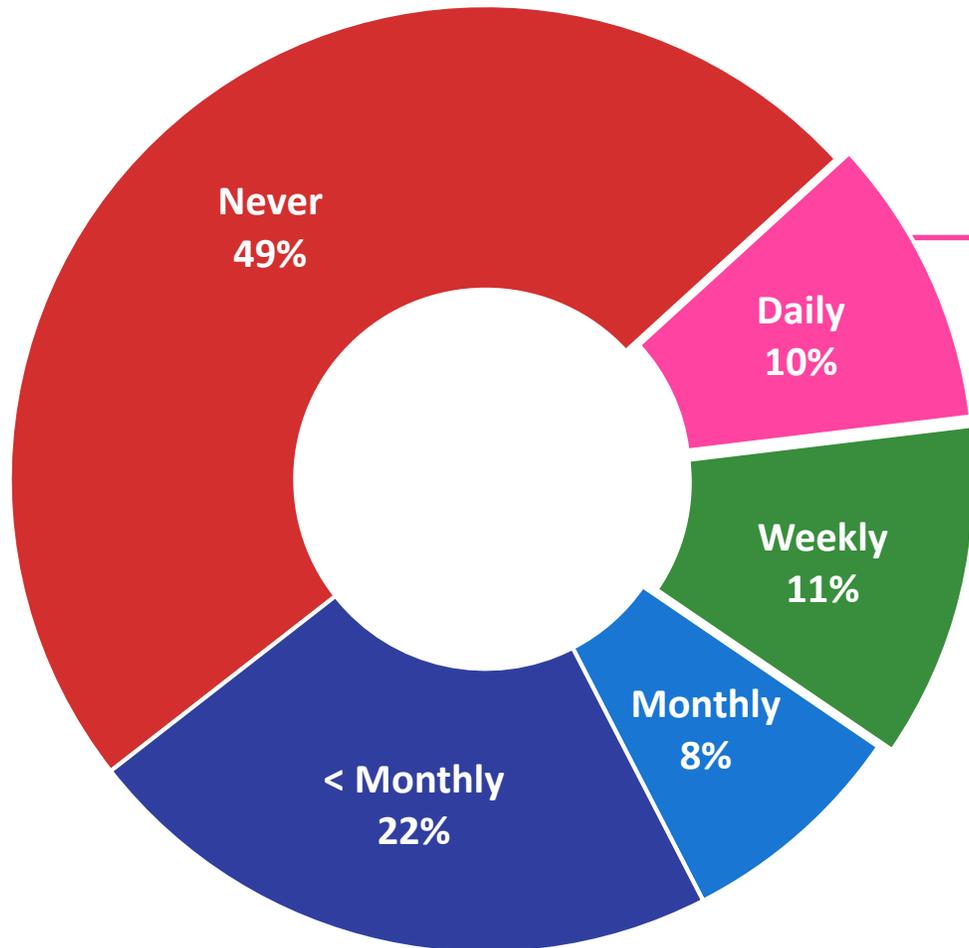


% of time spent with home station in a typical week via traditional platforms (an AM/FM radio at home/school/work or in a vehicle) vs. digital platforms (computer, mobile, smart speaker, podcasts)

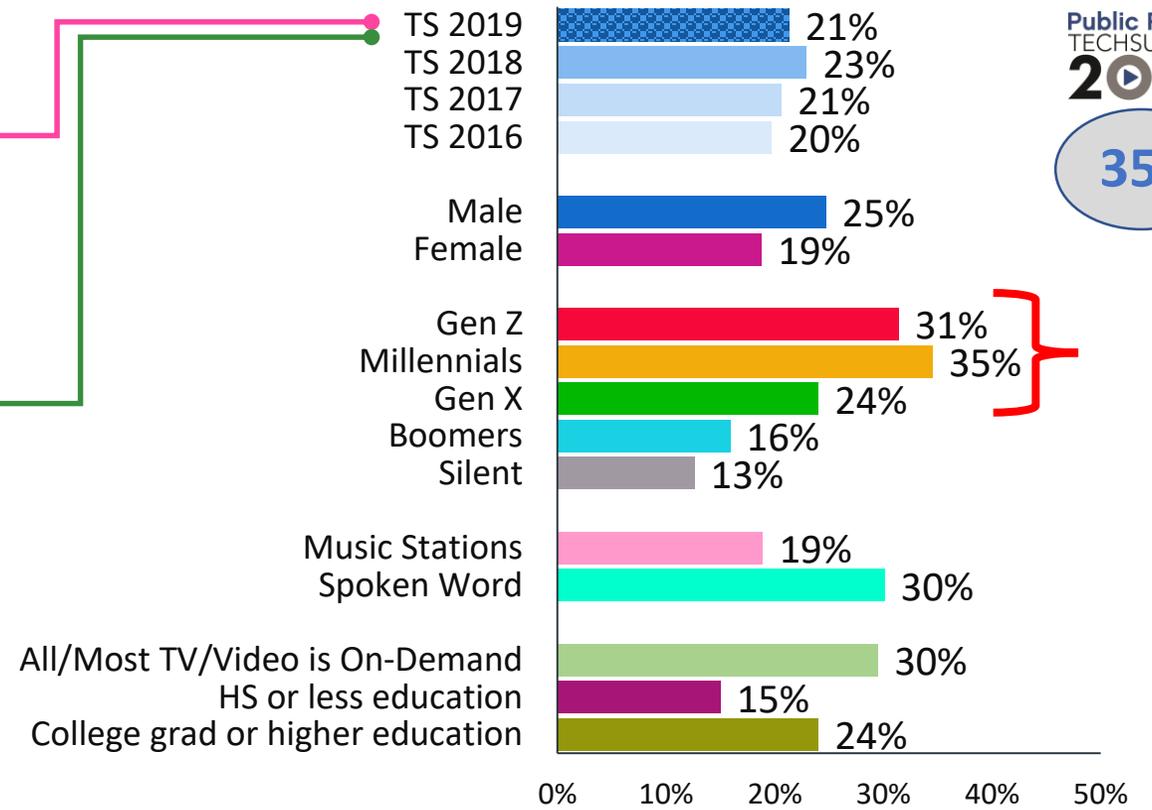
The Highest “Net Promoter” Recommendation Scores Are for Rock, Country, and CHR; Significantly Lower Than Christian & Public Radio



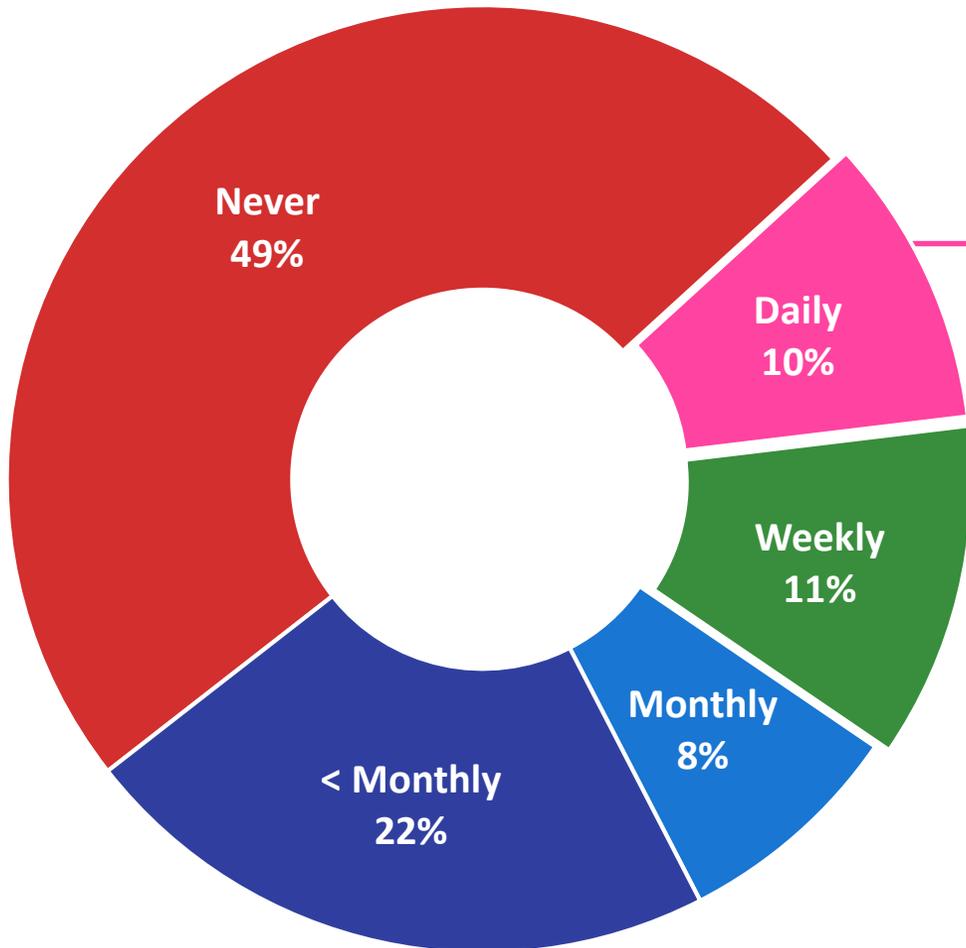
More Than One in Five Listens to Podcasts Weekly or More, Led By Men, Younger Generations, and College Grads



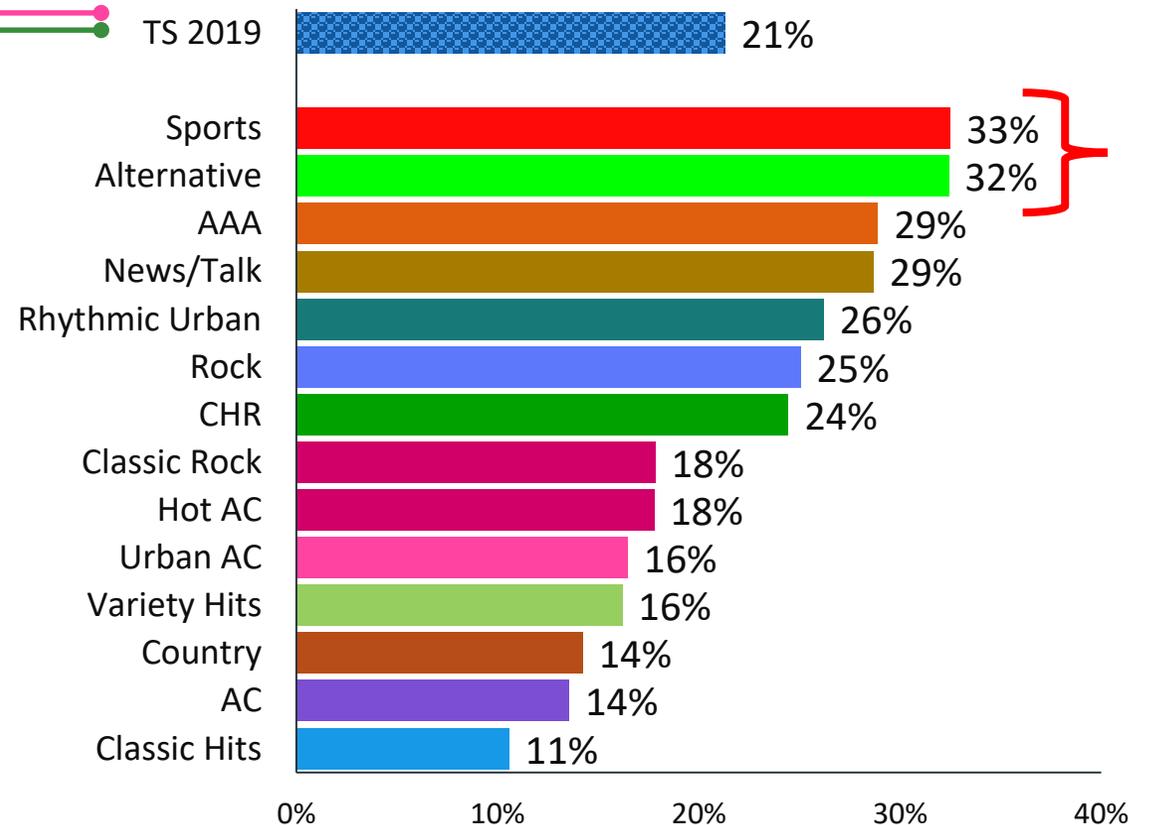
% Who Listen to Podcasts/On-Demand Audio Weekly or More



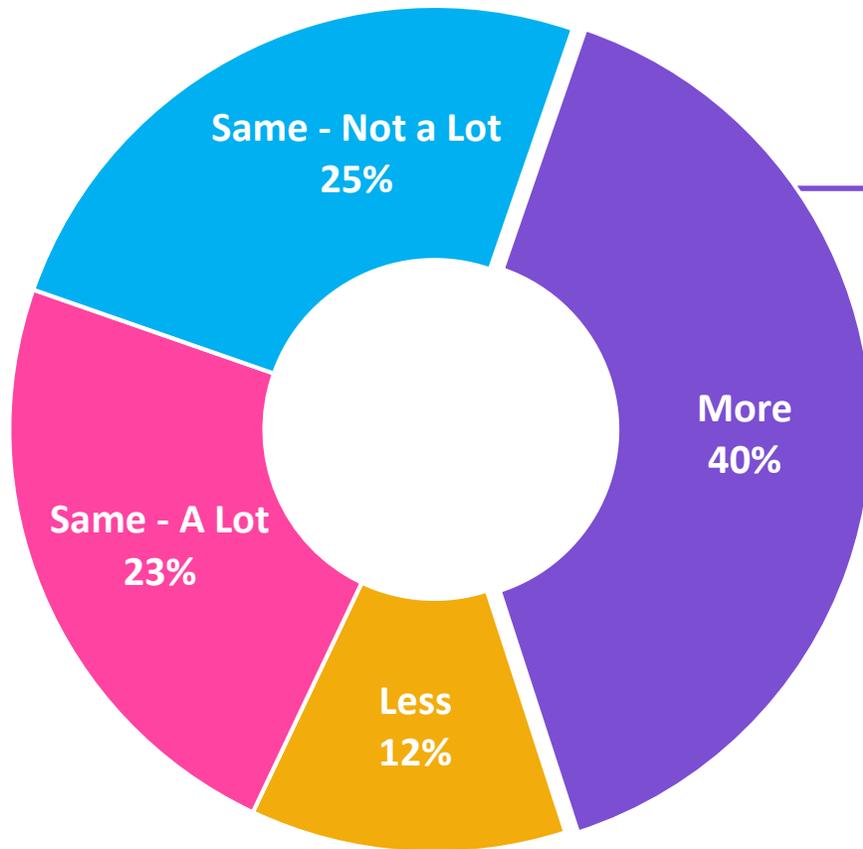
Sports Radio and Alternative Fans Lead the Way for Weekly Podcast Listening



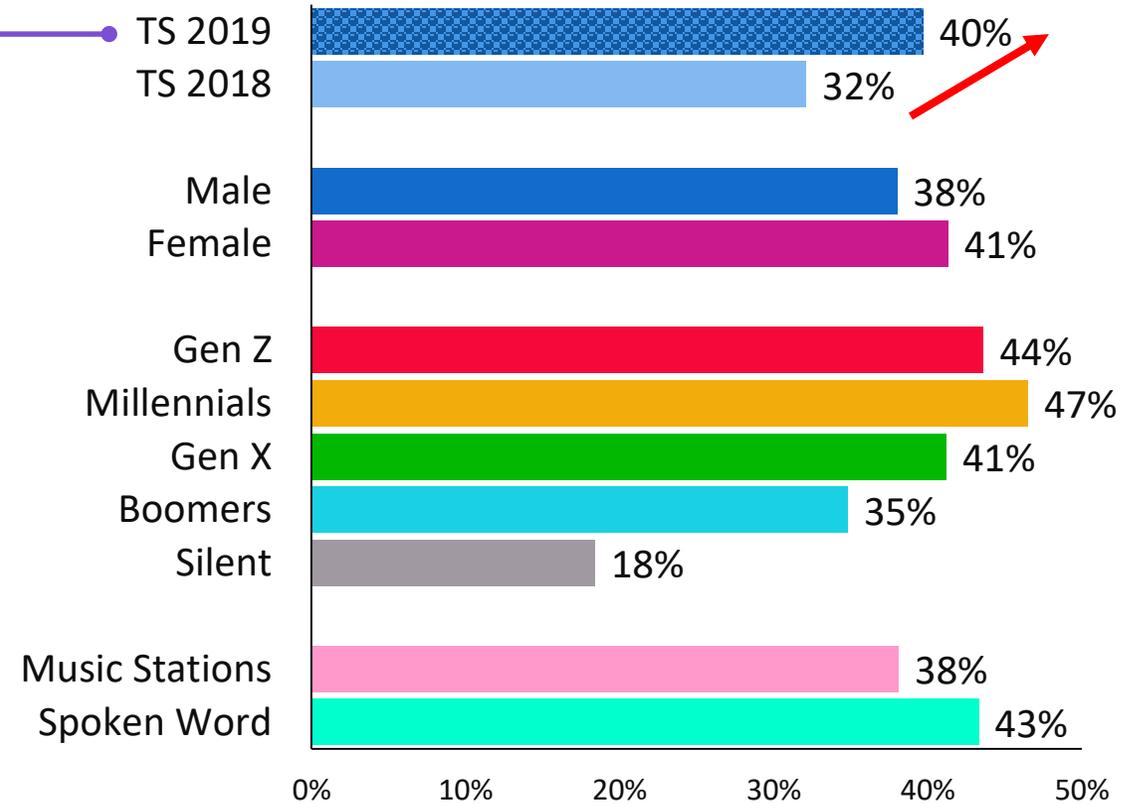
% Who Listen to Podcasts/On-Demand Audio Weekly or More



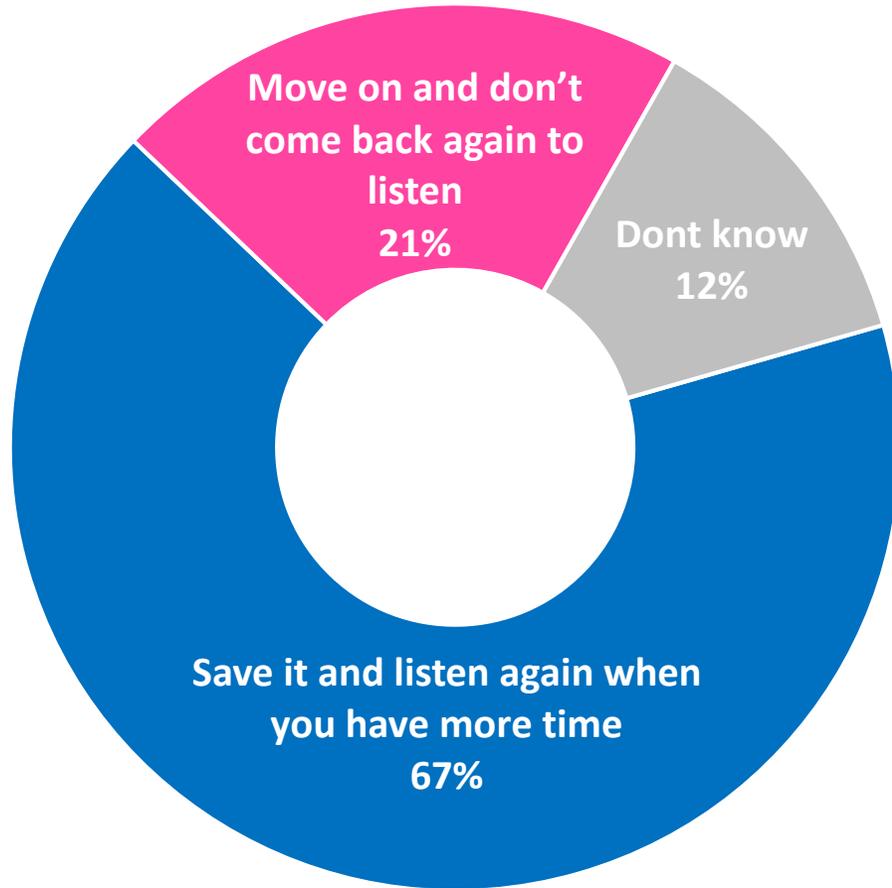
Four in Ten Weekly Podcast Listeners Say They Are Listening to More Podcasts in the Past Year



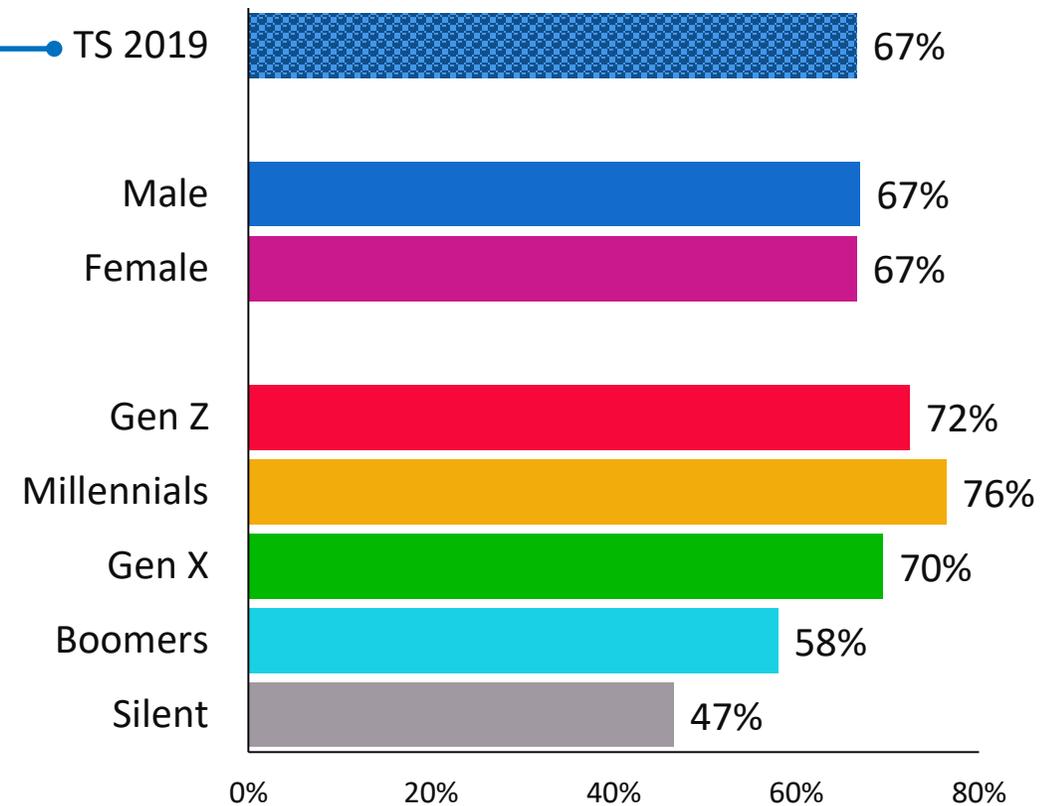
% of Weekly Podcast Listeners Who Say They Are Listening to Podcasts/On-Demand Audio More in the Past Year



Two-Thirds of Weekly Podcast Listeners Return to a Podcast to Finish Listening When They Have More Time

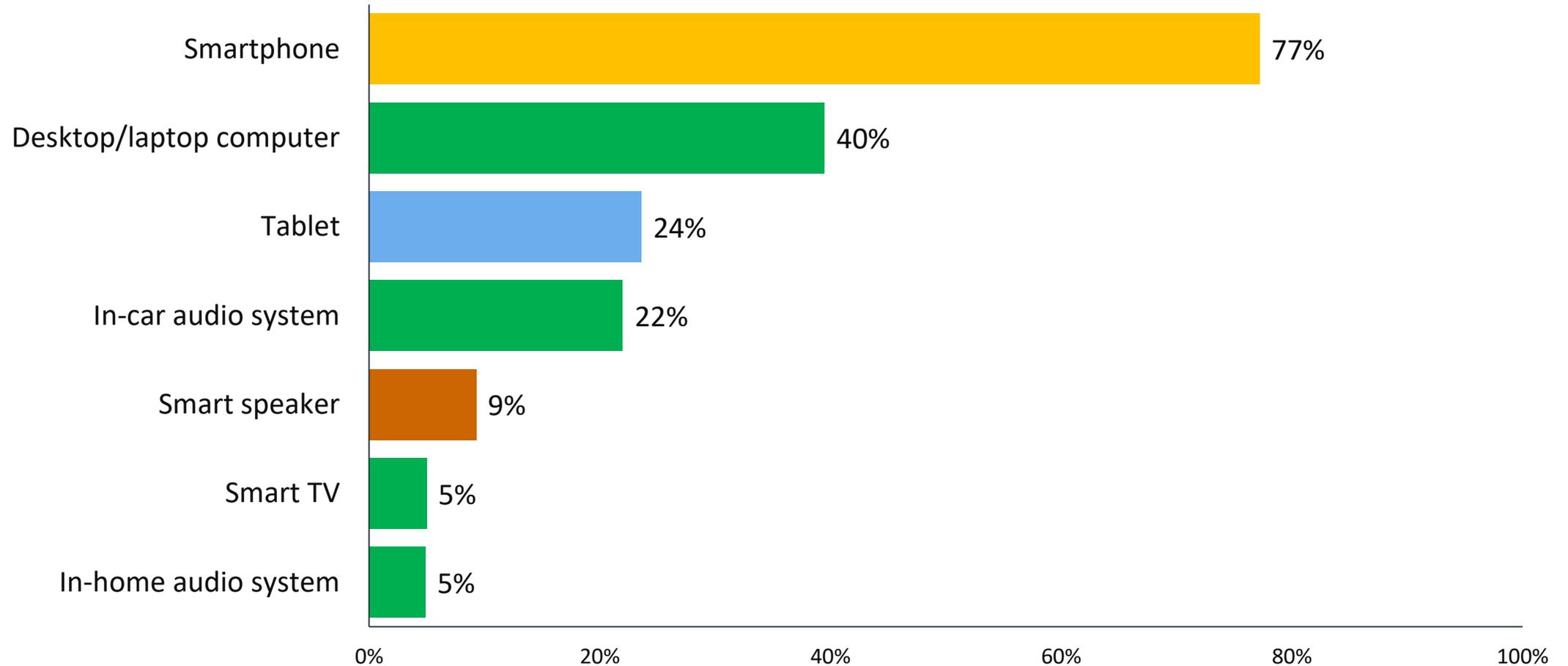


% of Weekly Podcast Listeners Return to an Unfinished Podcast to Listen Again When They Have More Time



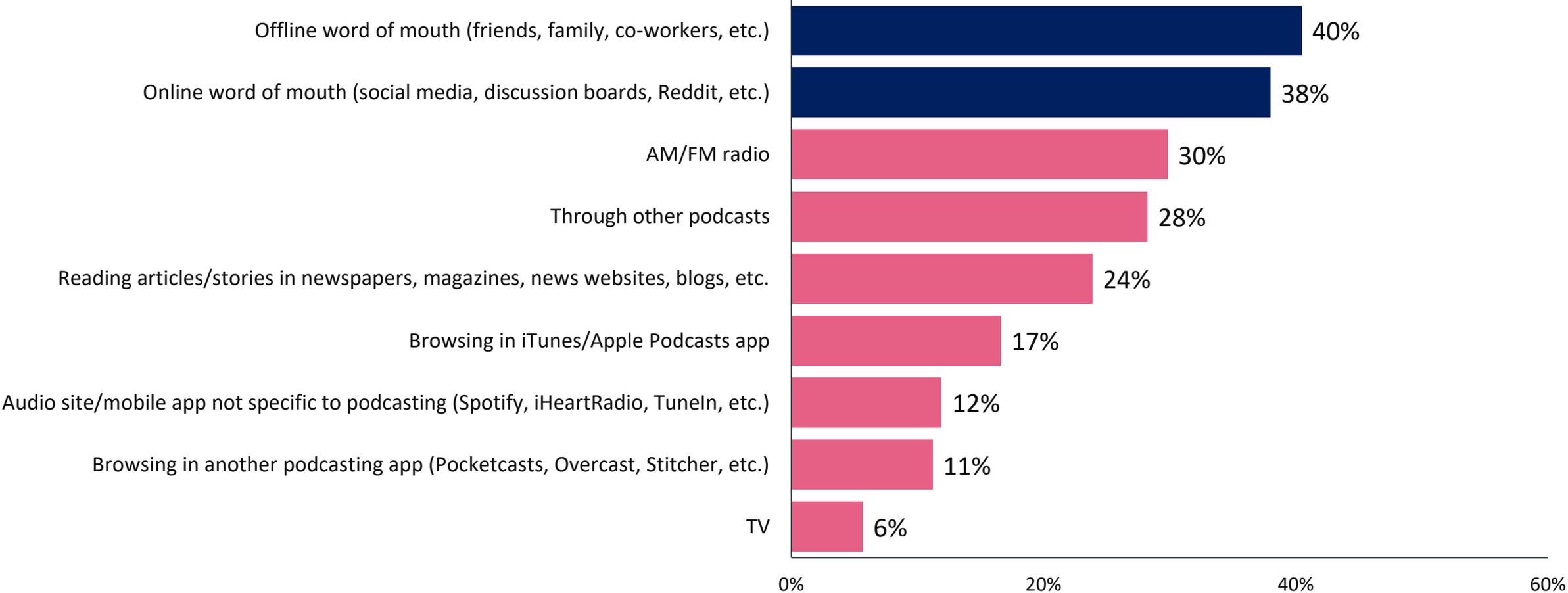
"In general, what do you do if a podcast episode runs longer than the time you have to listen?"

Smartphones Are by Far the Main Listening Platform for Weekly Podcast Listeners, Followed by Computers



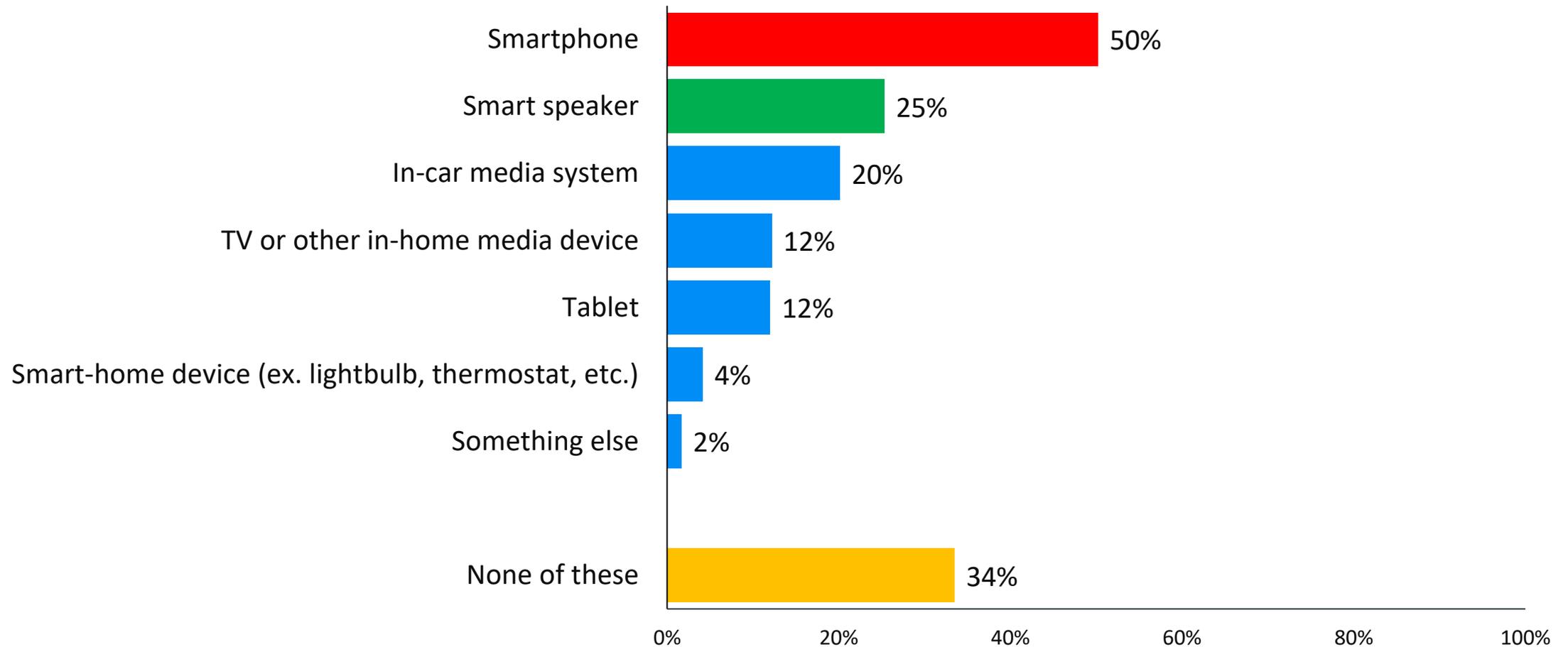
Among weekly podcast listeners, % who regularly listen to podcasts using each device

Word of Mouth, Both Offline and Online, Is the Main Driver For Discovering Podcasts



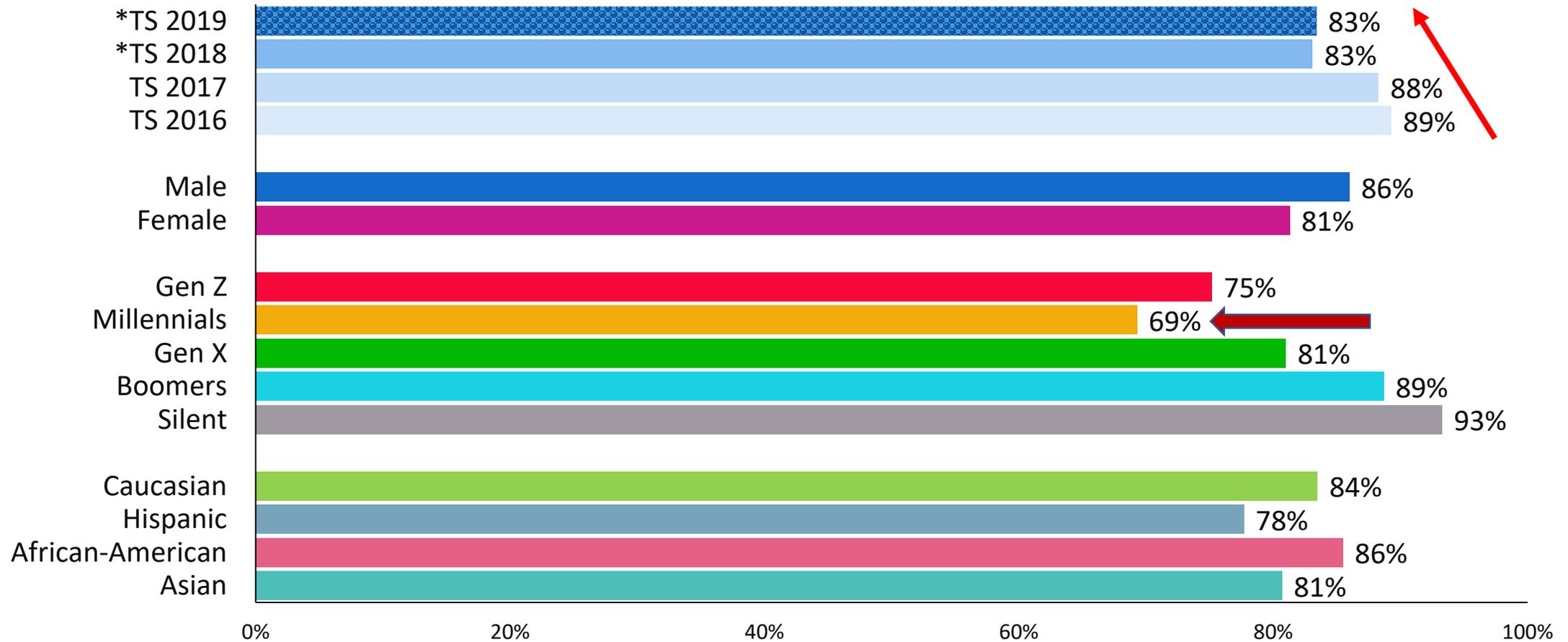
Among weekly podcast listeners,
% who typically discover podcasts via (source)

Two-Thirds Have Used the Built-In Voice Command Features On Any Device; Half Use Voice Commands on a Smartphone



Among all respondents (multiple responses accepted)

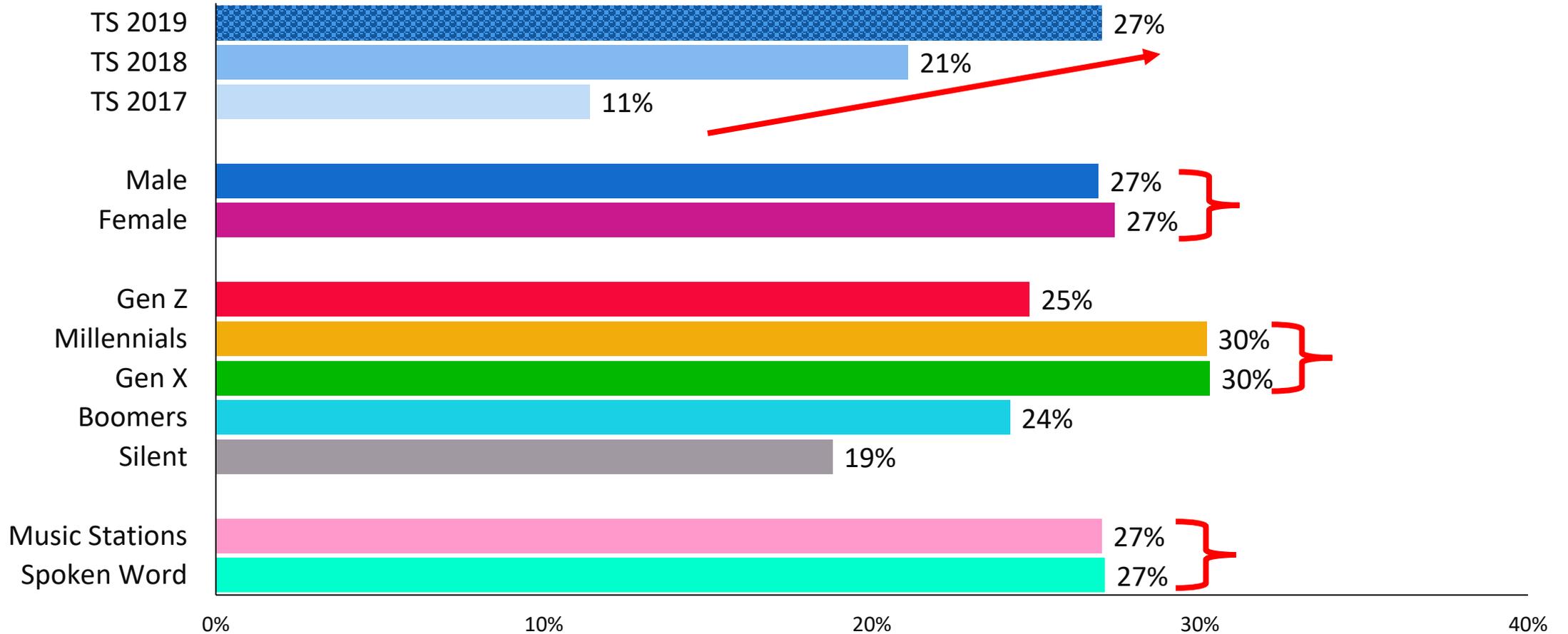
Only About Eight in Ten Have a Regular Radio Where They Live, While Only About Two-Thirds of Millennials Do



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

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

Smart Speaker Ownership Continues to Climb

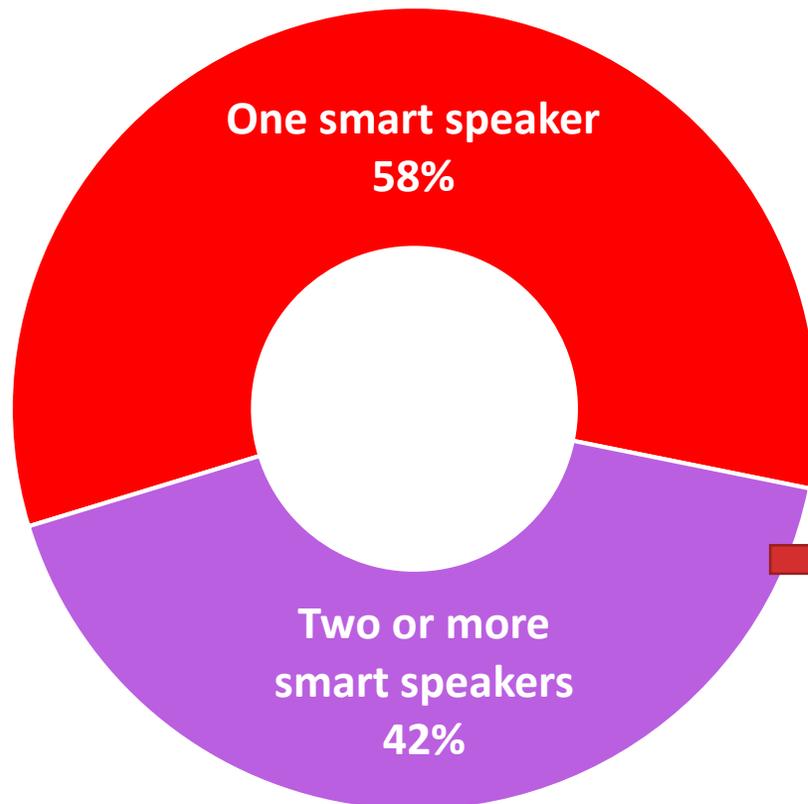


% who own a smart speaker (Amazon Alexa, Google Home, etc.)

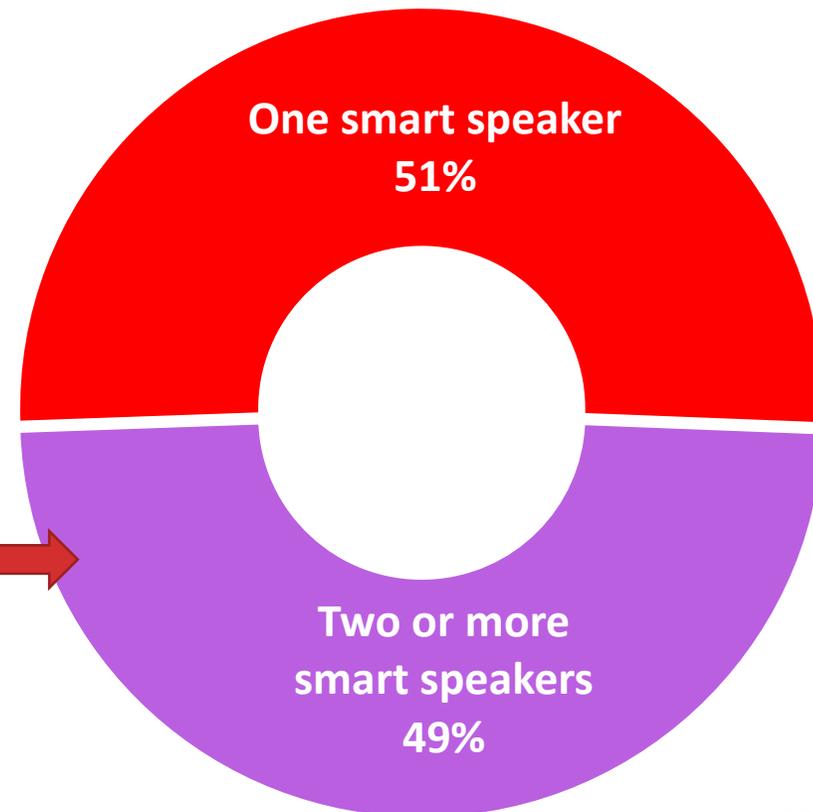
More Smart Speaker Owners Own More Than One of These Voice-Controlled Devices Than One Year Ago

% of Smart Speaker Owners Who Own...

TS 2018



TS 2019

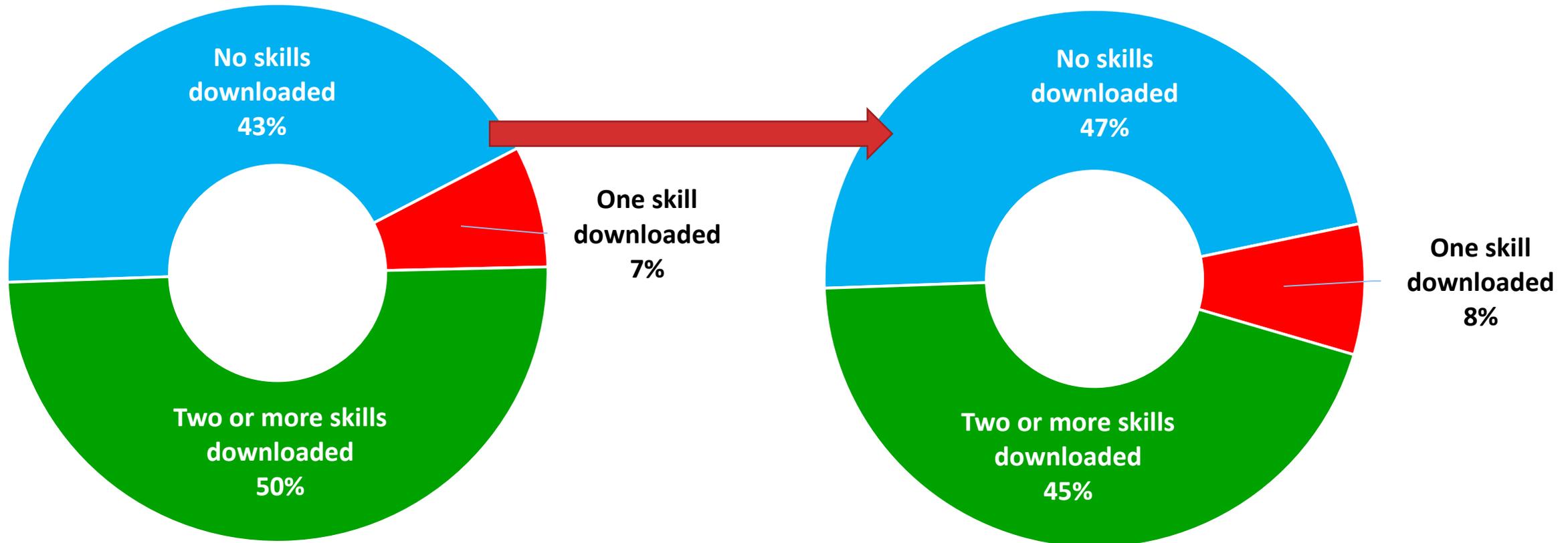


While There Are More Amazon Alexa Owners Overall in the Past Year, Fewer of Them Have Downloaded Any Alexa Skills

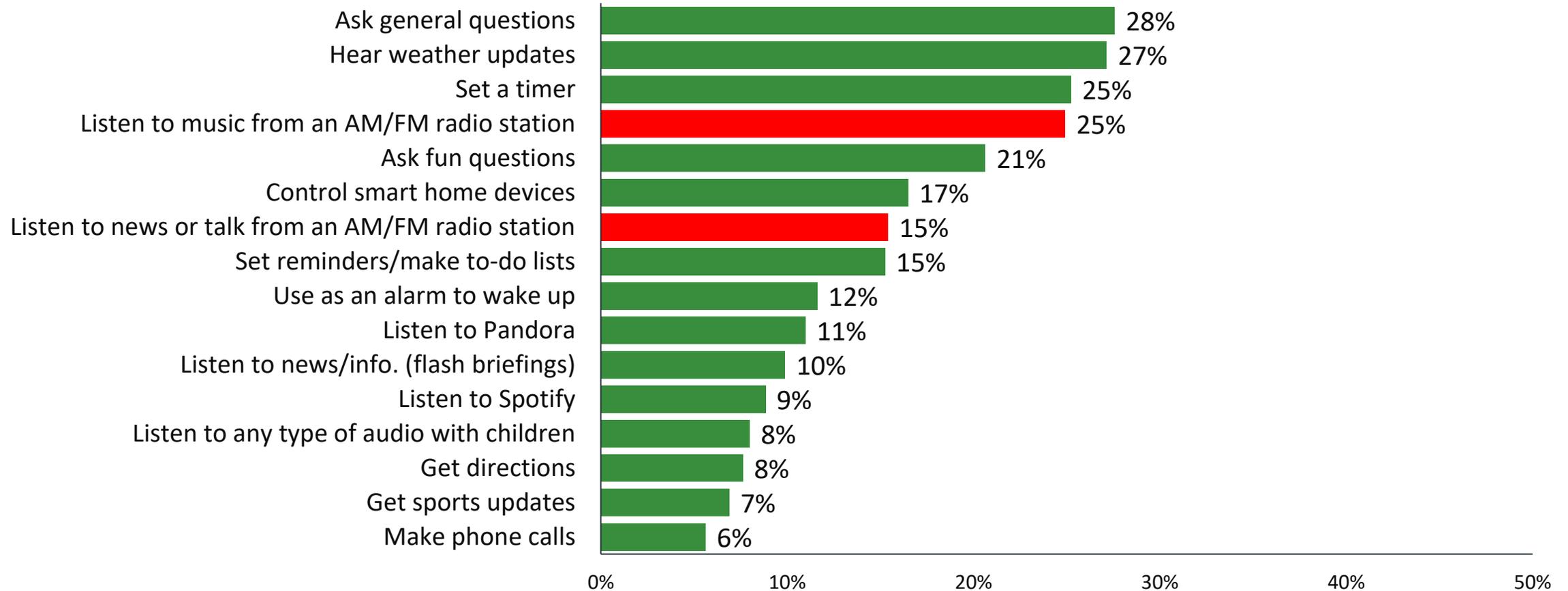
of Alexa Skills Downloaded Among Amazon Alexa Smart Speaker Owners

TS 2018

TS 2019

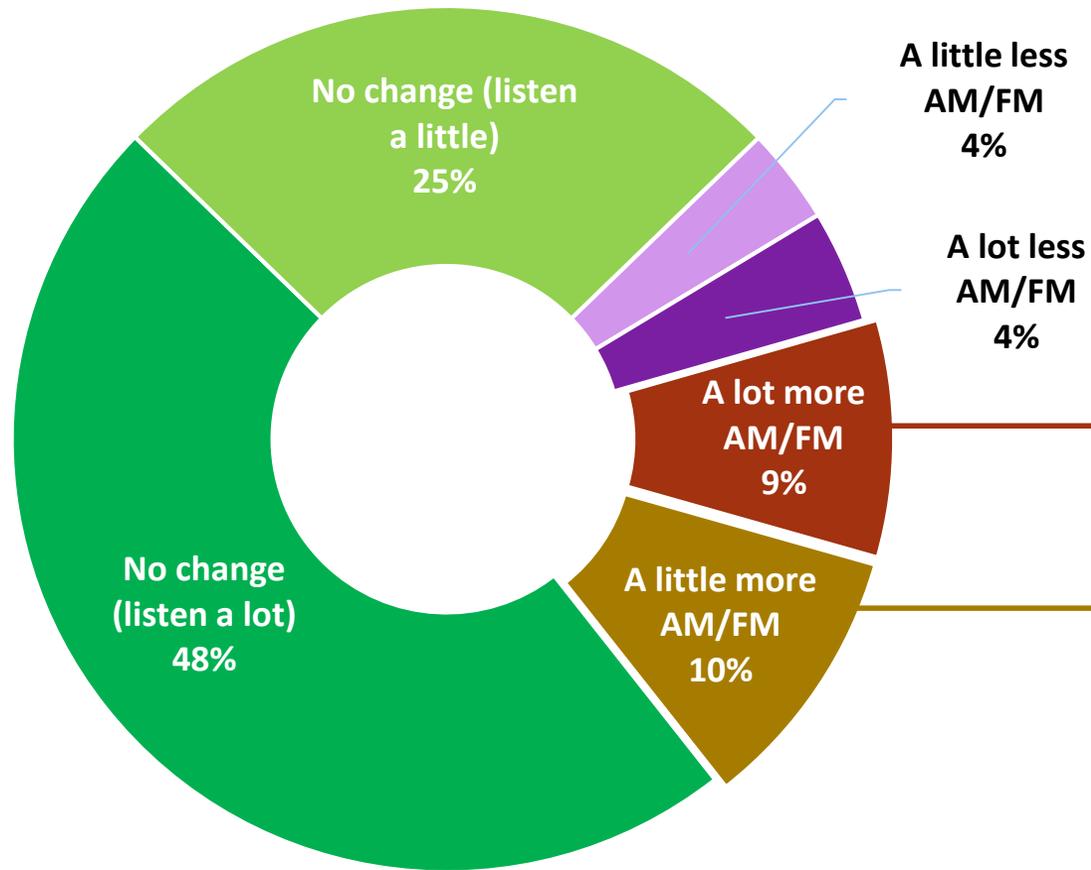


One-Fourth Frequently Listen to Music From AM/FM Radio on Their Smart Speaker(s); AM/FM News/Talk Listening Is Also a Frequent Use

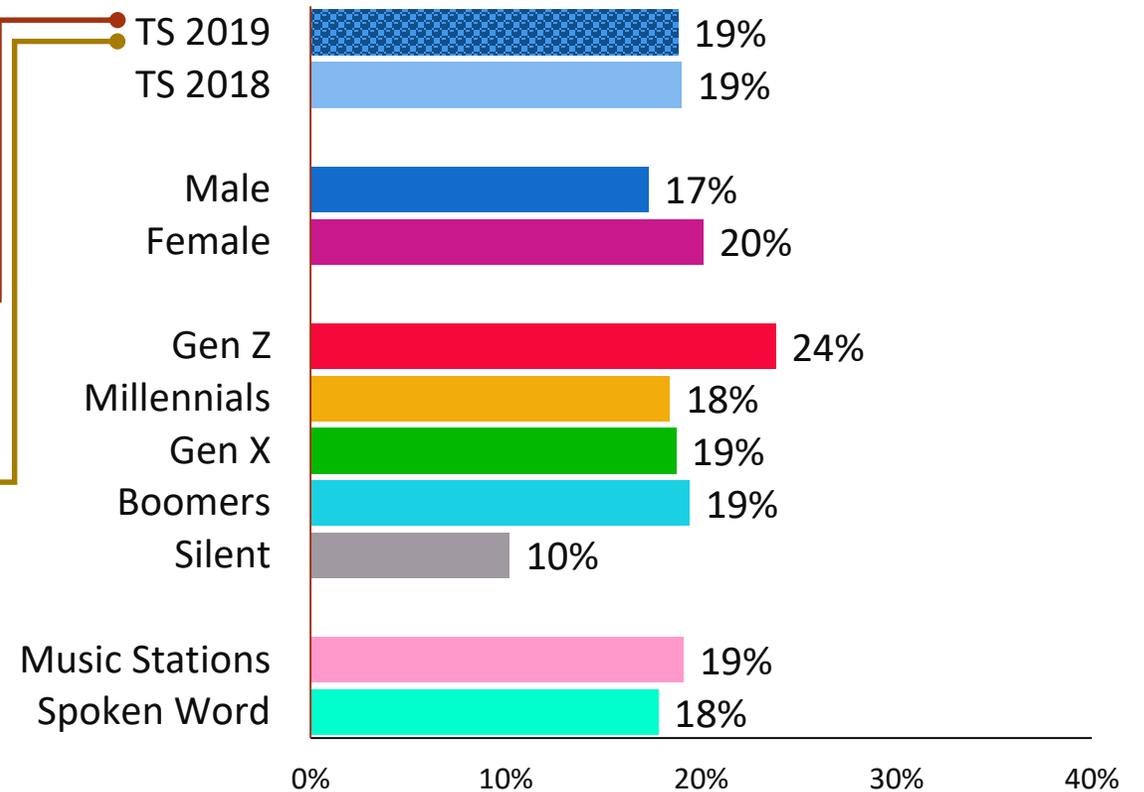


% of smart speaker owners who “frequently” use their device(s)
in each way (most mentioned uses; 6% or more)

Gen Z Most Apt to Listen to More AM/FM Radio Since Getting a Smart Speaker, But All Demos Show Solid Gains

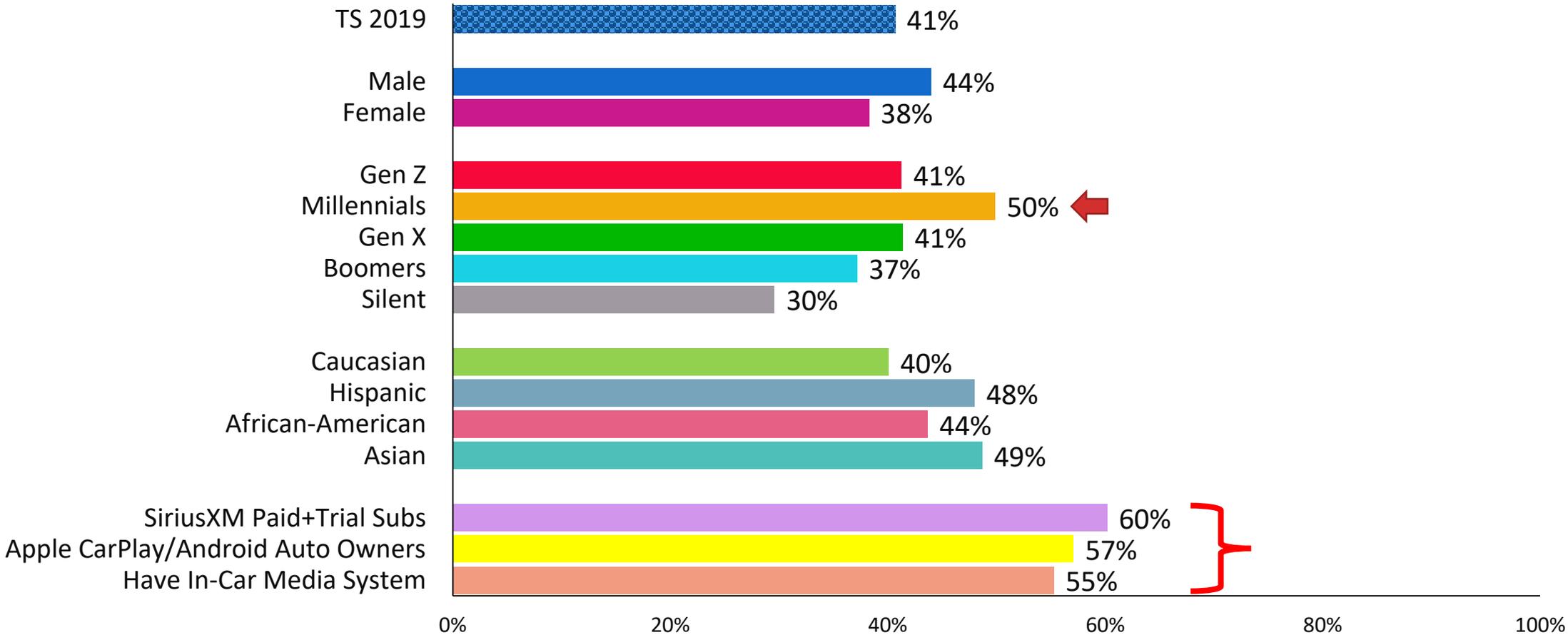


% of Smart Speaker Owners Who Say They Are Listening to AM/FM Radio Stations More (A Lot + A Little) Since Getting a Smart Speaker



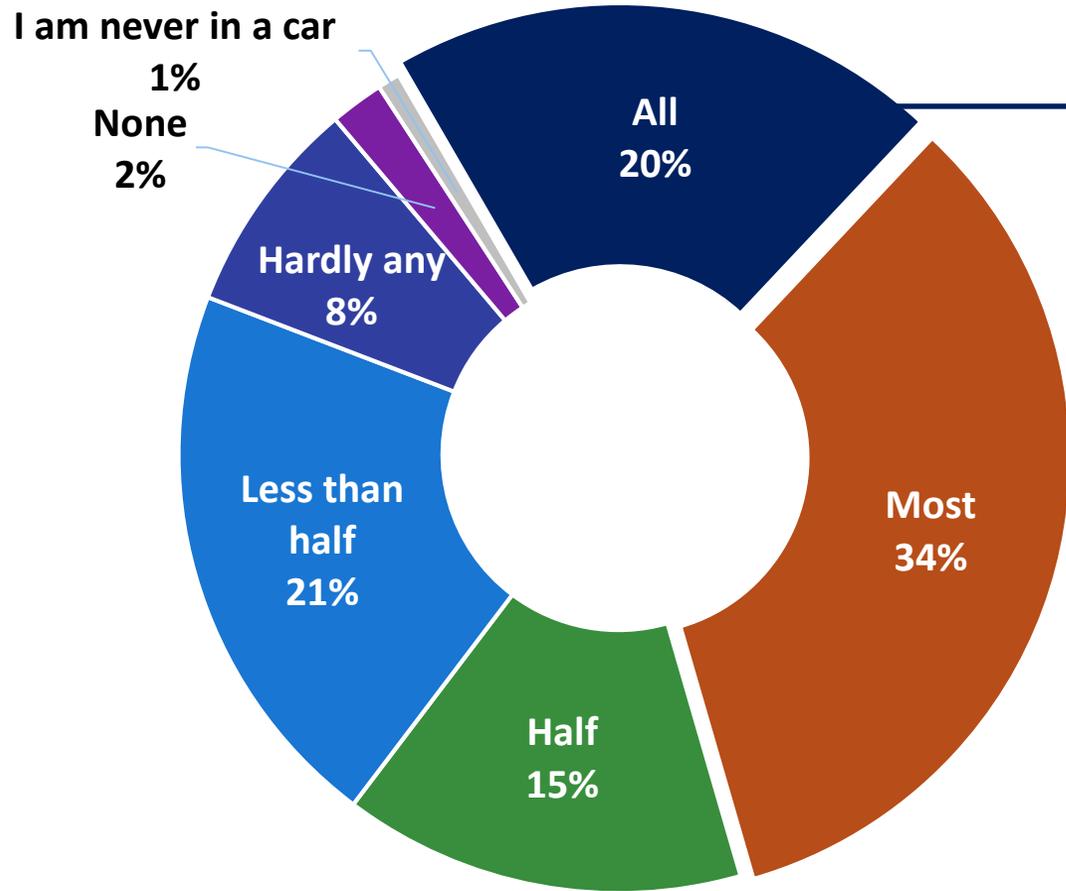
“How has your listening to AM/FM radio stations changed overall since you got a smart speaker?”

A Main Reason For Listening Less to AM/FM Radio: *“I Have More Audio Options to Listen to in the Car”*

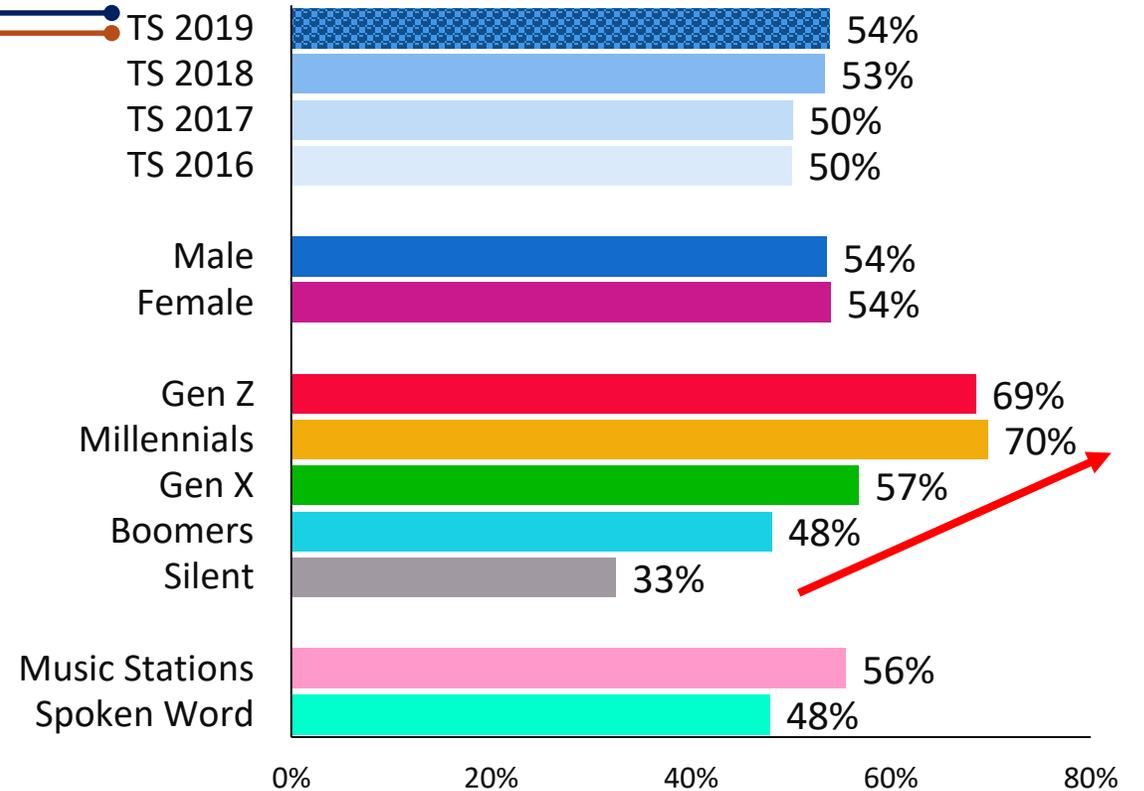


Among those who say they are listening less to AM/FM radio in the past year, % who say this is a main reason they listen less

More Than Half of Listeners Say All or Most of Their AM/FM Radio Listening Is In-Car; Highest Among Gen Z and Millennials

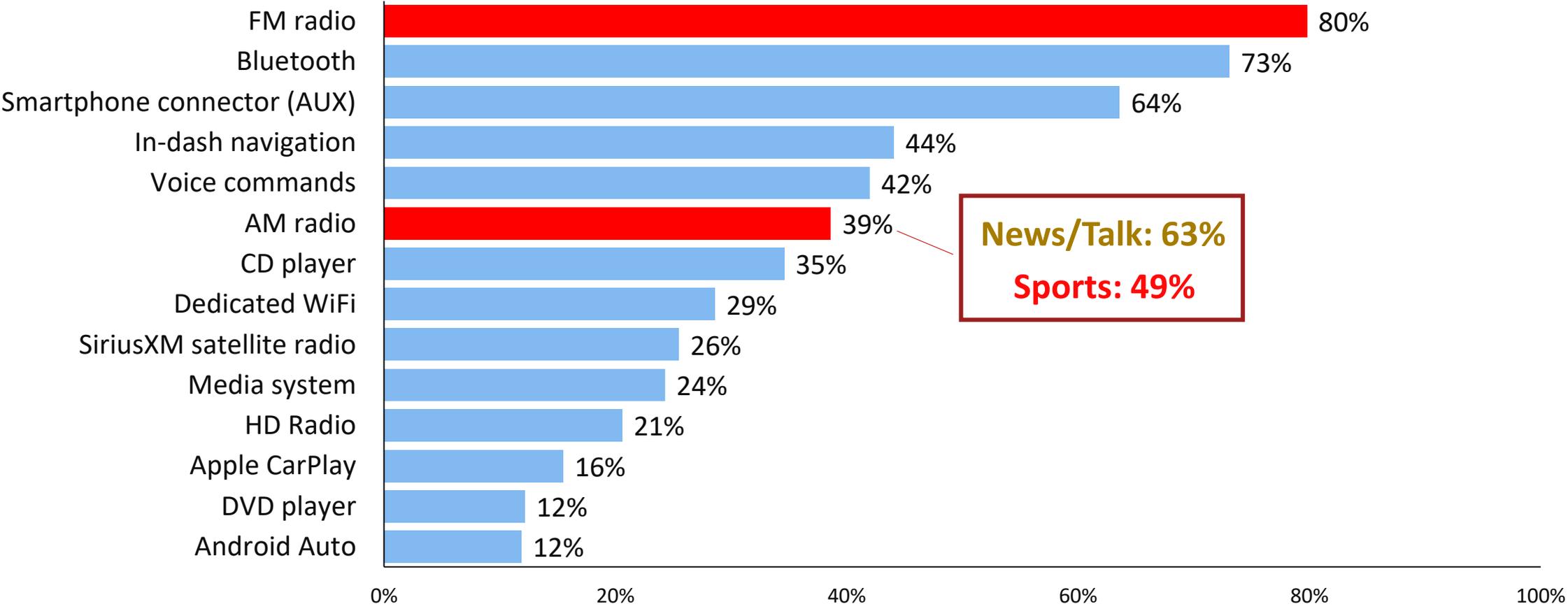


% Saying "All" or "Most" AM/FM Radio Listening Is In-Car



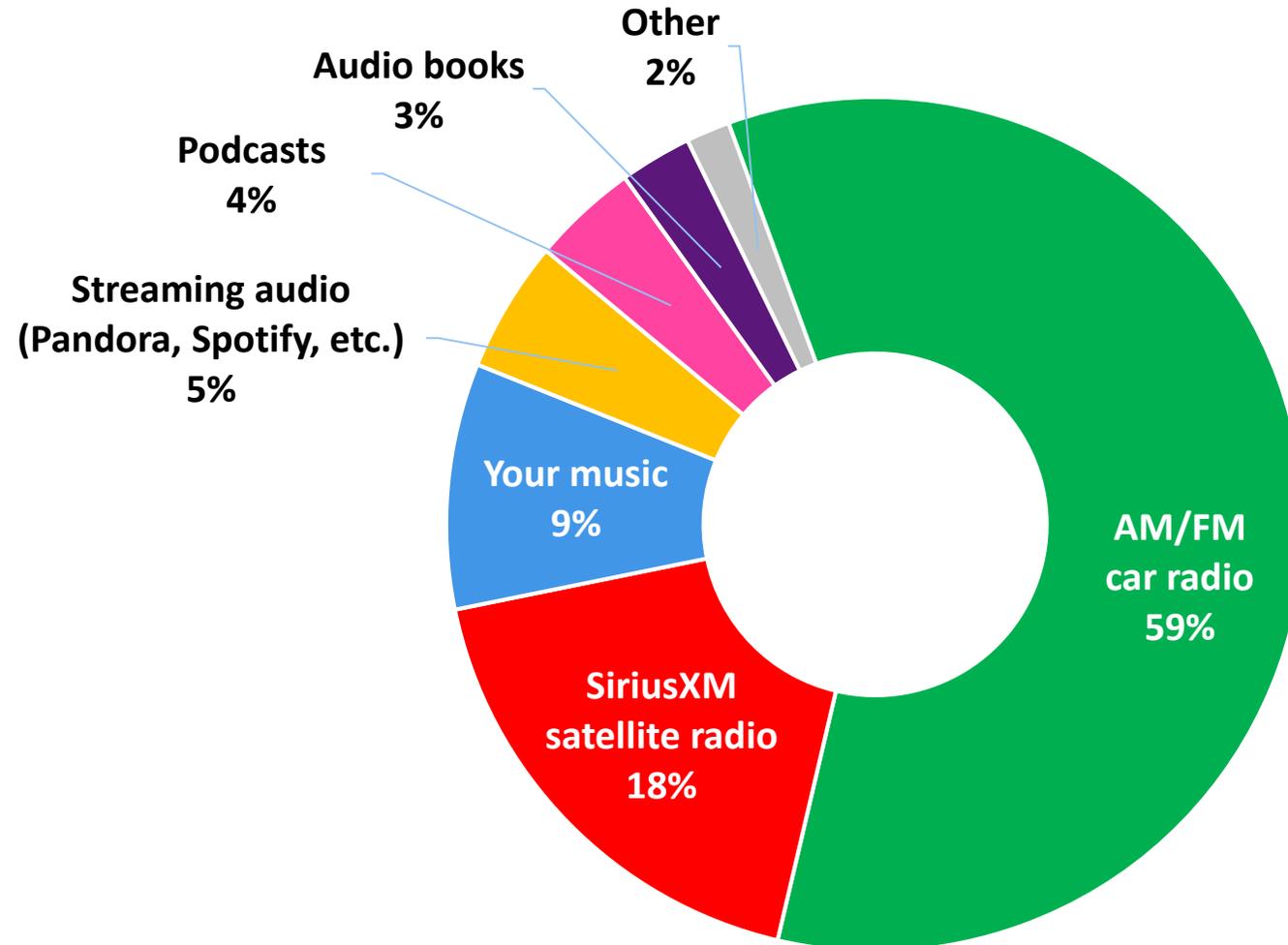
"During an average weekday, about how much of your total AM/FM radio listening time takes place in a car?"

FM Radio Leads the List of Most Important New Car Features, Followed by Bluetooth and Auxiliary Jack to Connect Smartphones

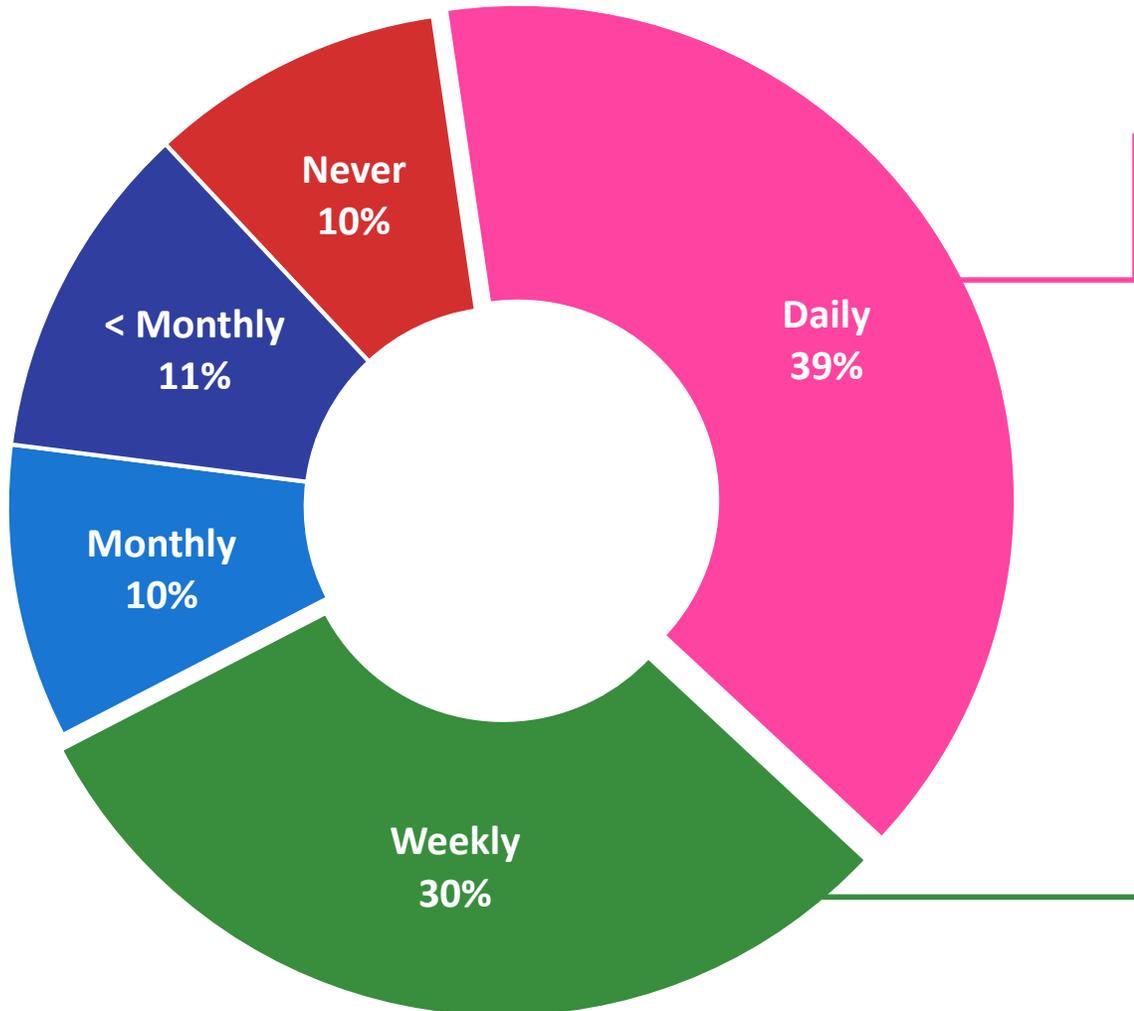


“Very Important” features among those planning on buying/leasing (or already bought) a new vehicle in 2019 (9% of all respondents)

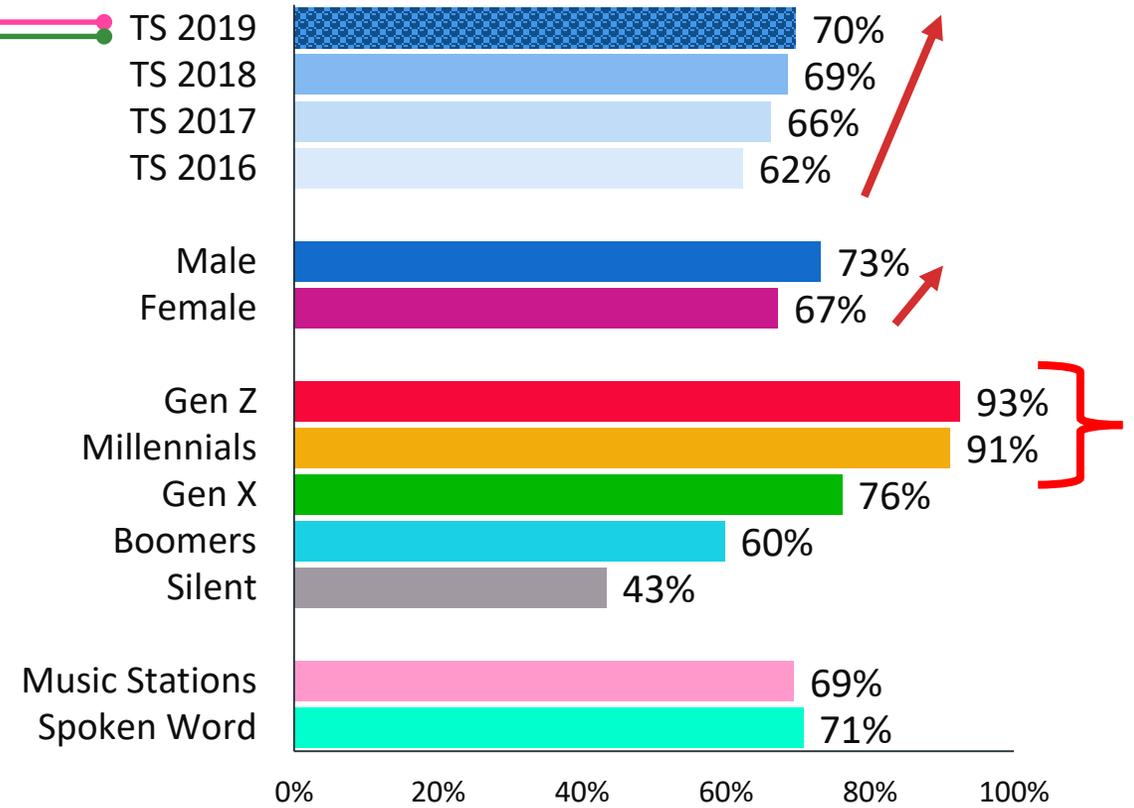
On an Average Weekday, AM/FM Radio Has a 59% Share of In-Car Media Use; Satellite Radio Is Next With an 18-Share



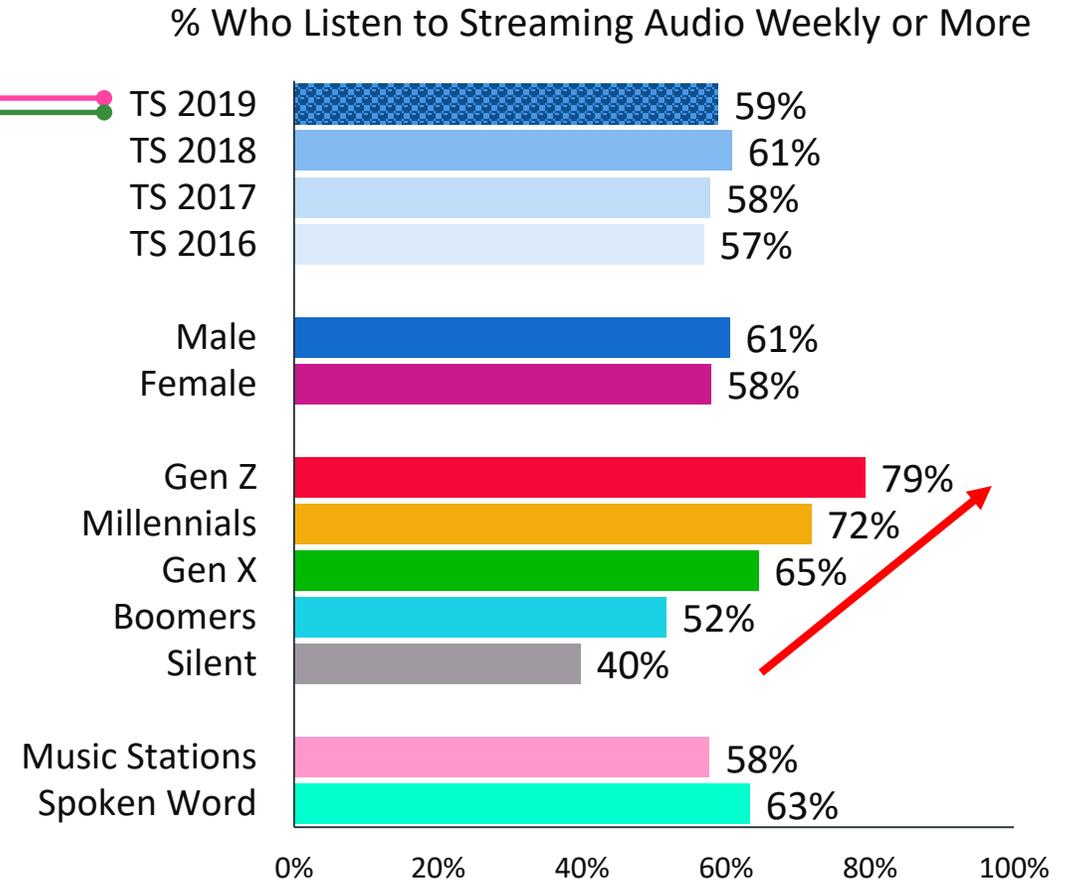
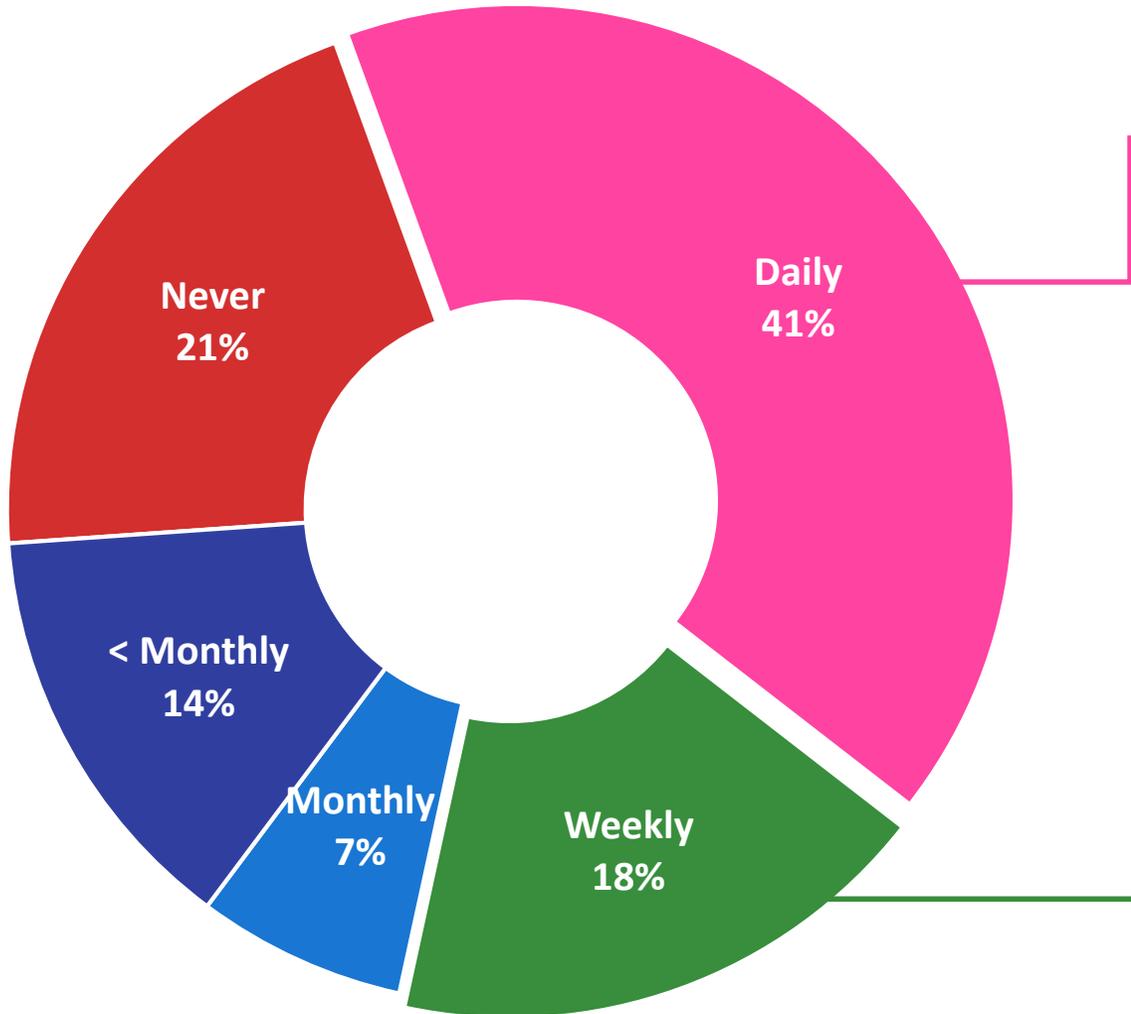
About Four in Ten Watch Streaming Video Daily; Weekly Usage Is Now Up to Seven in Ten



% Who Watch Streaming Video Weekly or More

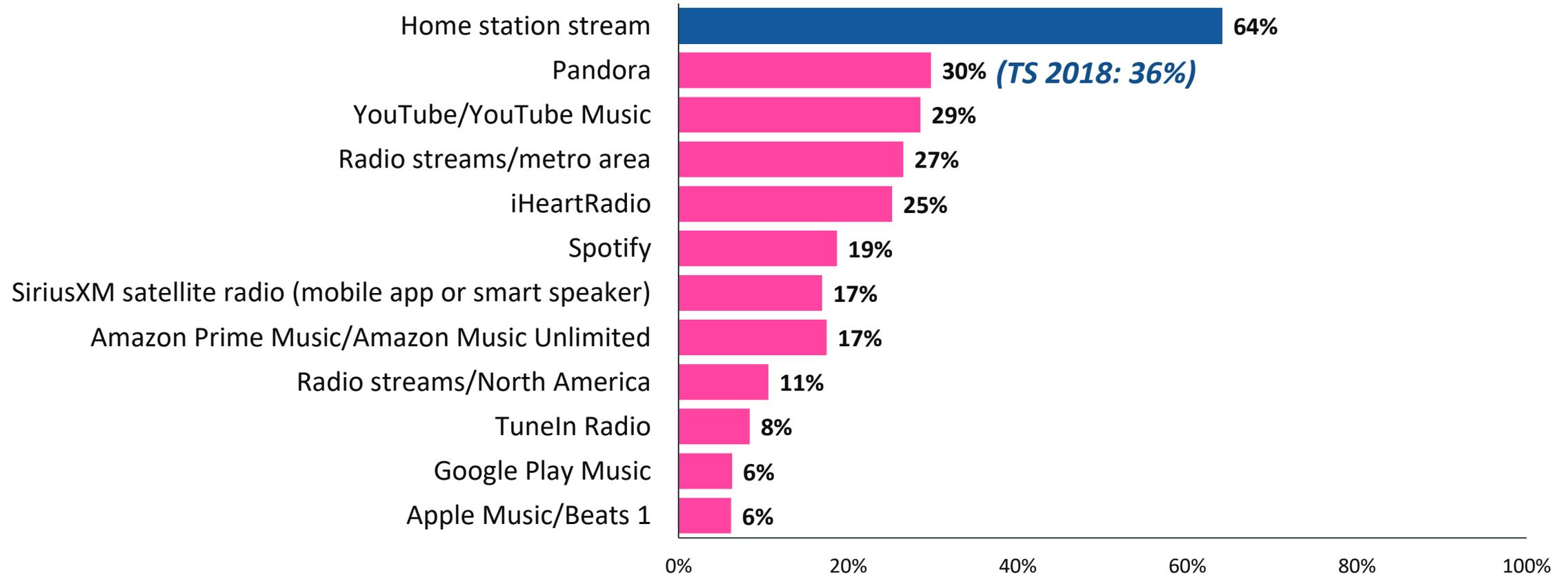


More Than Four in Ten Listen to Streaming Audio Daily; Weekly Usage Is Flat at About Six in Ten



Nearly Two-Thirds Listen to the Home Station's Stream, Far Ahead of Pandora, YouTube, Spotify, and iHeartRadio

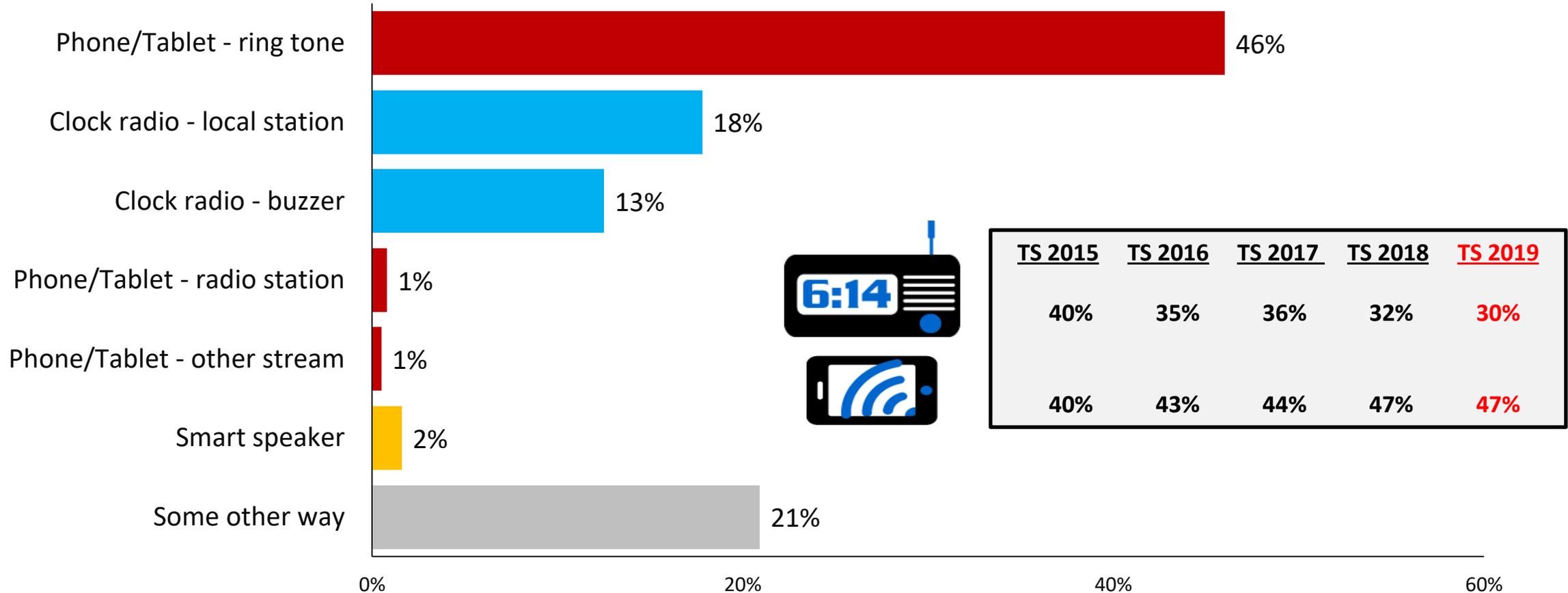
% Who Listen to Each Streaming Audio Platform Weekly or More



Among those who listen to streaming audio monthly or more (platforms 5% or greater shown)

Using a Mobile Device to Wake Up Is Increasing in Popularity, Specifically With a Ring Tone

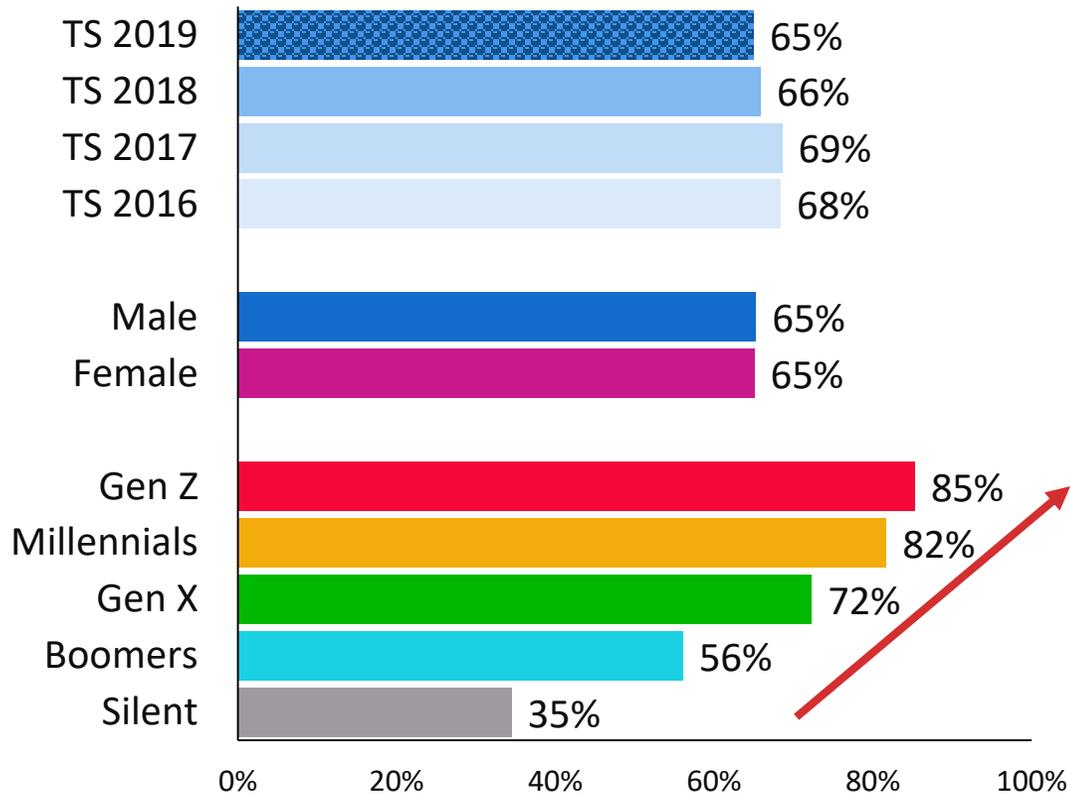
% Who Use Each Method to Wake Up in the Morning



Among cell phone, smartphone and/or tablet owners

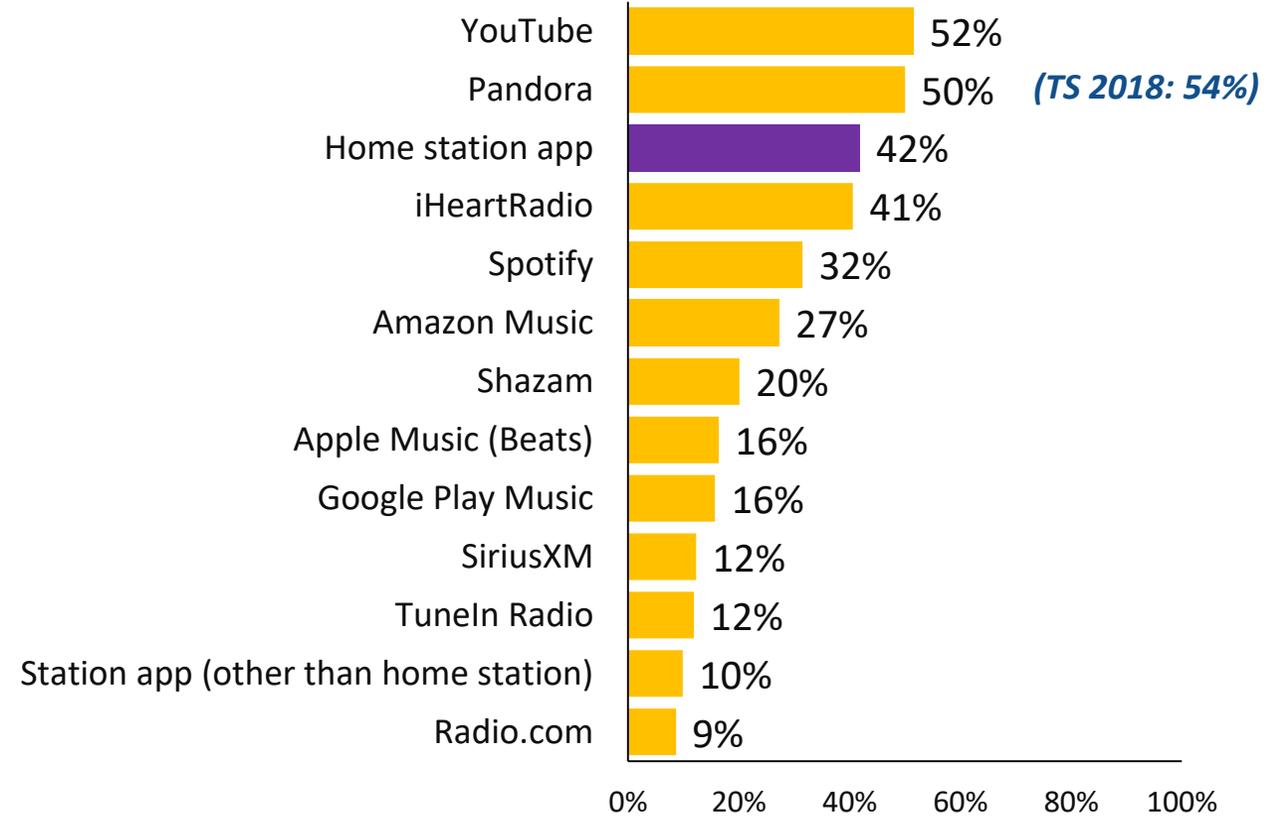
About Two-Thirds Have Downloaded a Radio/Music App on Their Mobile Device; YouTube Is the Most Downloaded

% Who Have Downloaded a Radio/Music App



Among smartphone and/or tablet owners

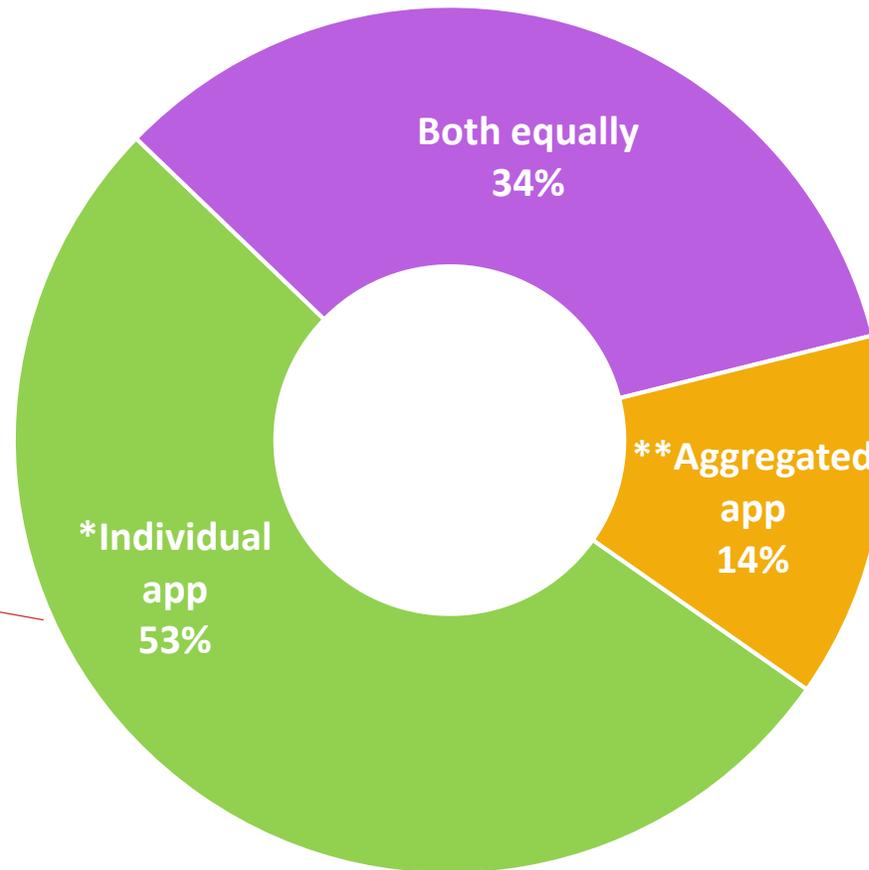
% of Smartphone/Tablet Owners Who Have Downloaded Each Radio/Music App



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

There Is Significantly More Interest in a Standalone Home Station App Than for an Aggregated Station App

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



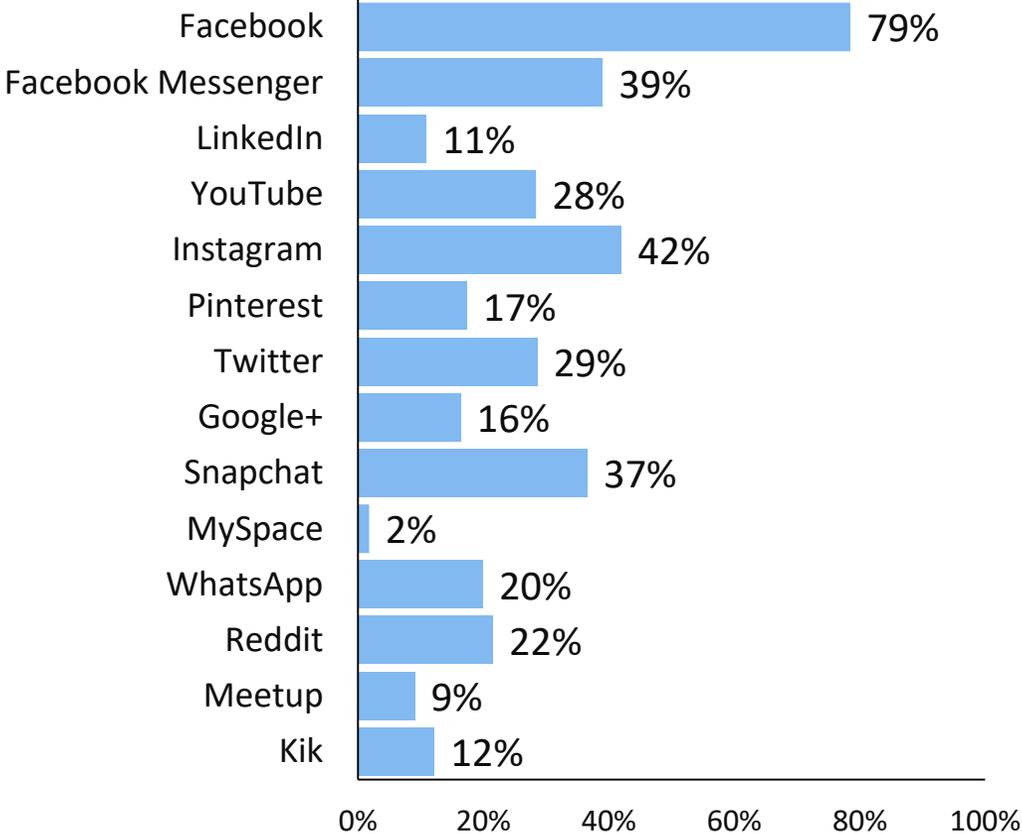
***Their own streaming mobile app with features (videos, podcasts, contests) specific to what they do on the air**

****Part of app (stream only) that offers hundreds of other radio stations to choose from**

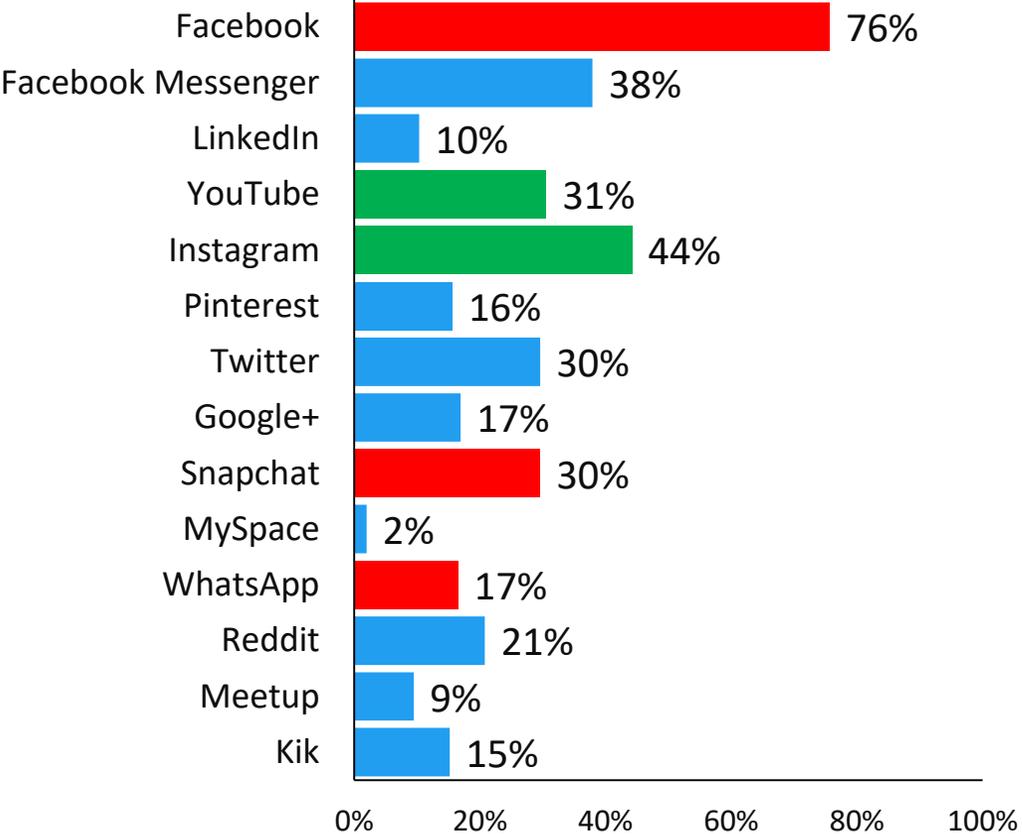
Among smartphone and/or tablet owners who are interested in a home station app

Daily Usage Among Those With a Profile Is Up for YouTube And Instagram; Down for Facebook, Snapchat & WhatsApp

TS 2018

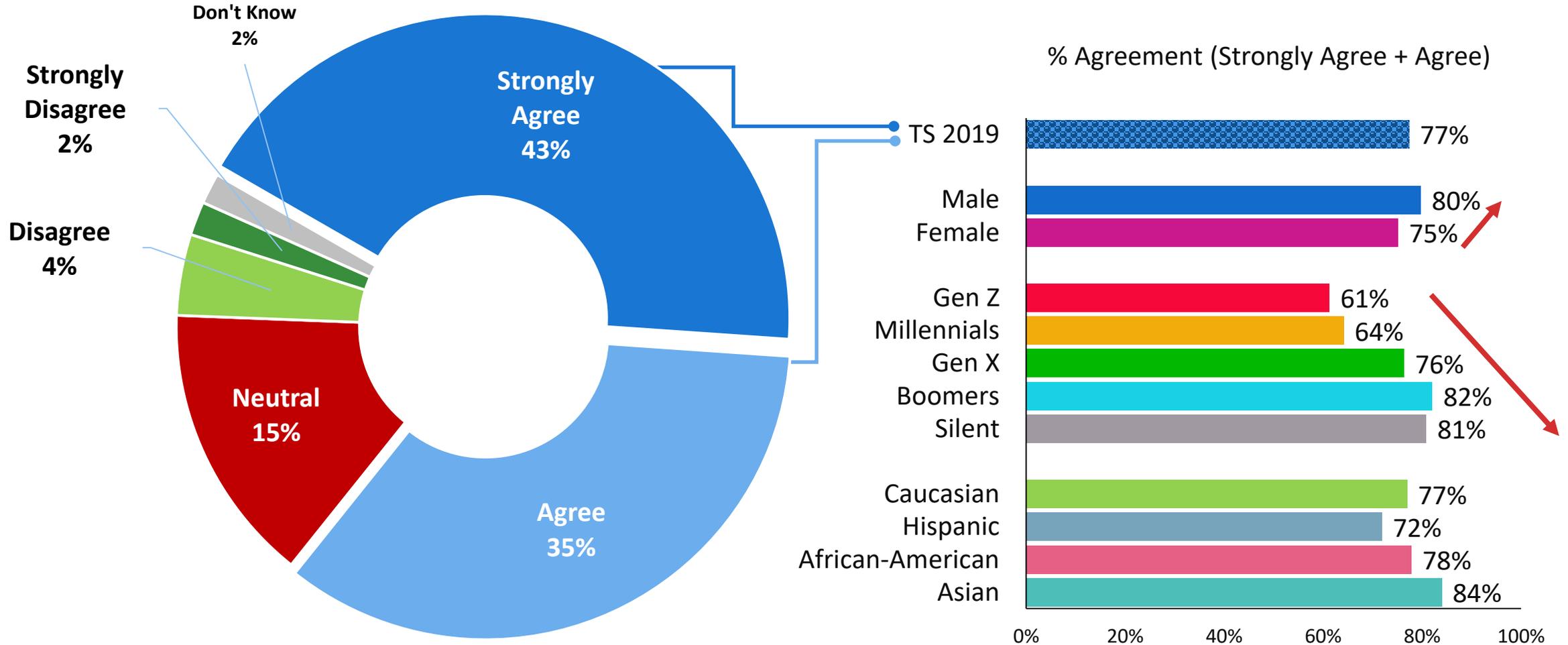


TS 2019



Among those with a profile on (platform), % who use (platform) daily

Three in Four Express Concern Over Use of Their Personal Data by Tech Companies, Particularly Older Generations



"I'm concerned about the ways in which tech companies are using my personal data"

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- www.jacobsmedia.com
- www.jacapps.com
- www.sonicaid.com
- fred@jacobsmedia.com
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Radio's Survival Kit