



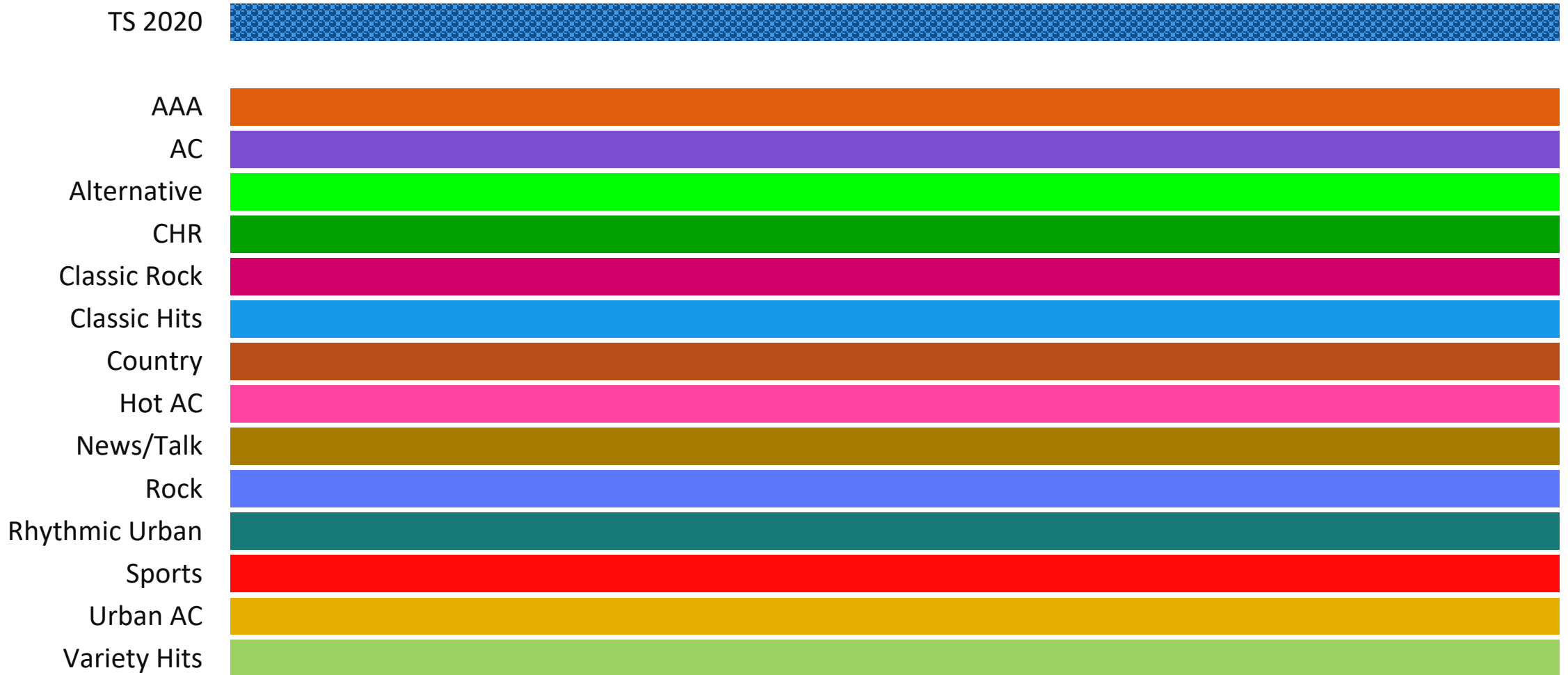
 **TECHSURVEY**
2020 JACOBS MEDIA

Facing Radio's Biggest Challenge

Methodology

- 504 commercial radio stations in the U.S. & Canada
- N = 46,008
- Interview dates: January 7 - February 9, 2020
- 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 2019 market populations data.
- This is a web survey and does not represent all commercial radio listeners or even each station's audience. It is not stratified to the U.S./Canadian populations.

Format Key



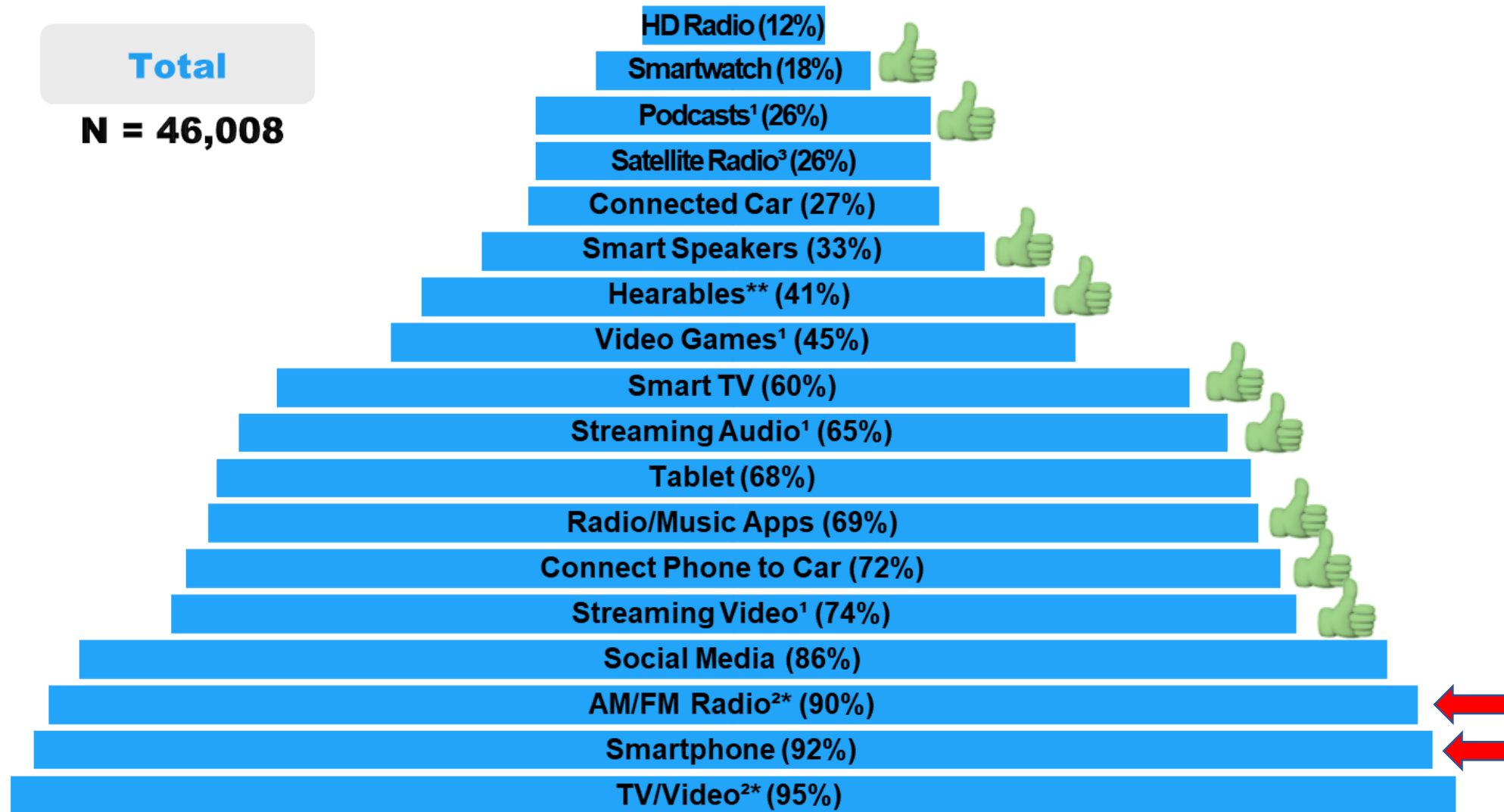




Media Pyramid 2020

Total

N = 46,008



Total TS 2019
12%
13%
21%
26%
25%
27%

43%
54%
59%
69%
65%
68%
70%
85%
91%
91%
95%

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



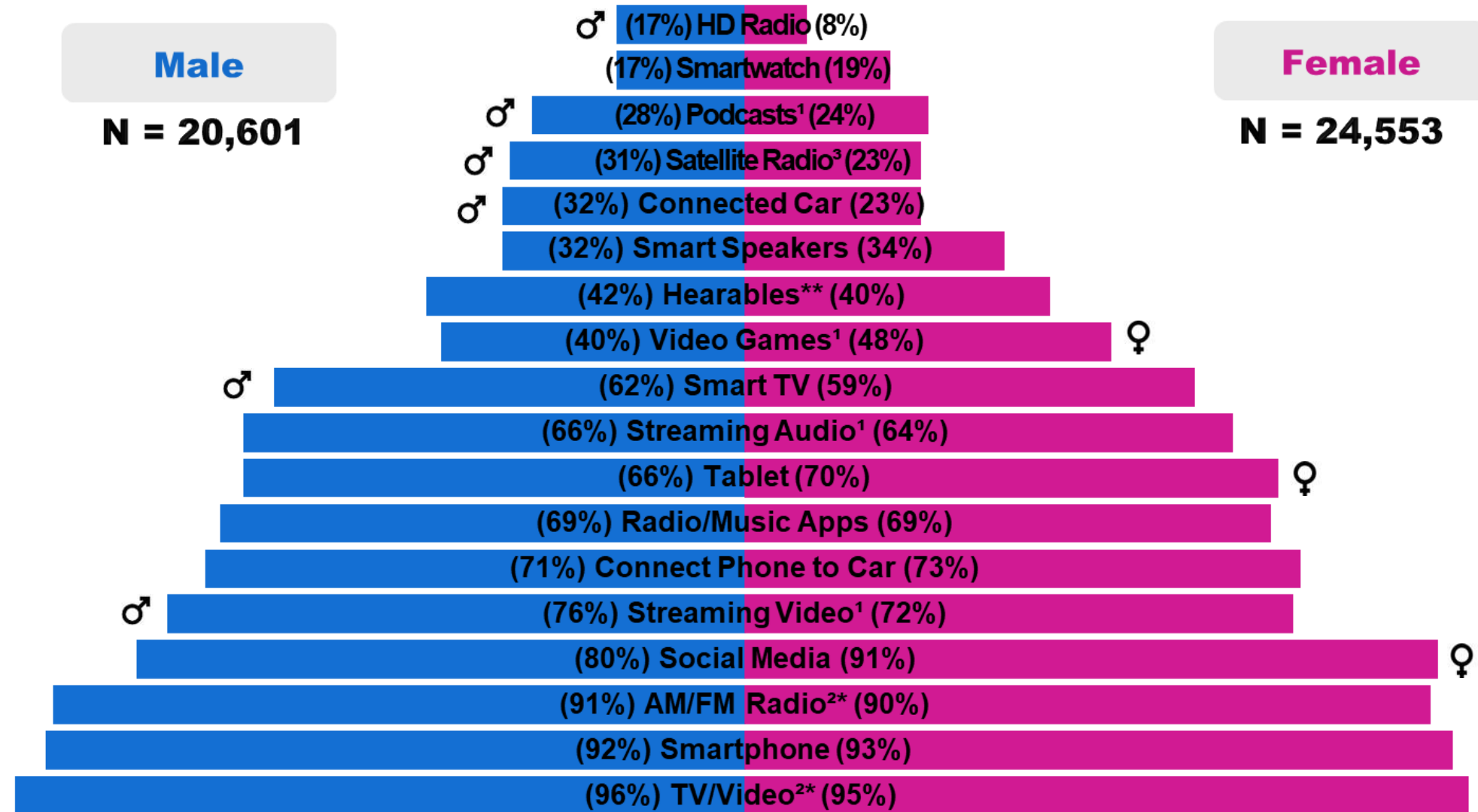
Media Pyramid 2020

Male

N = 20,601

Female

N = 24,553



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



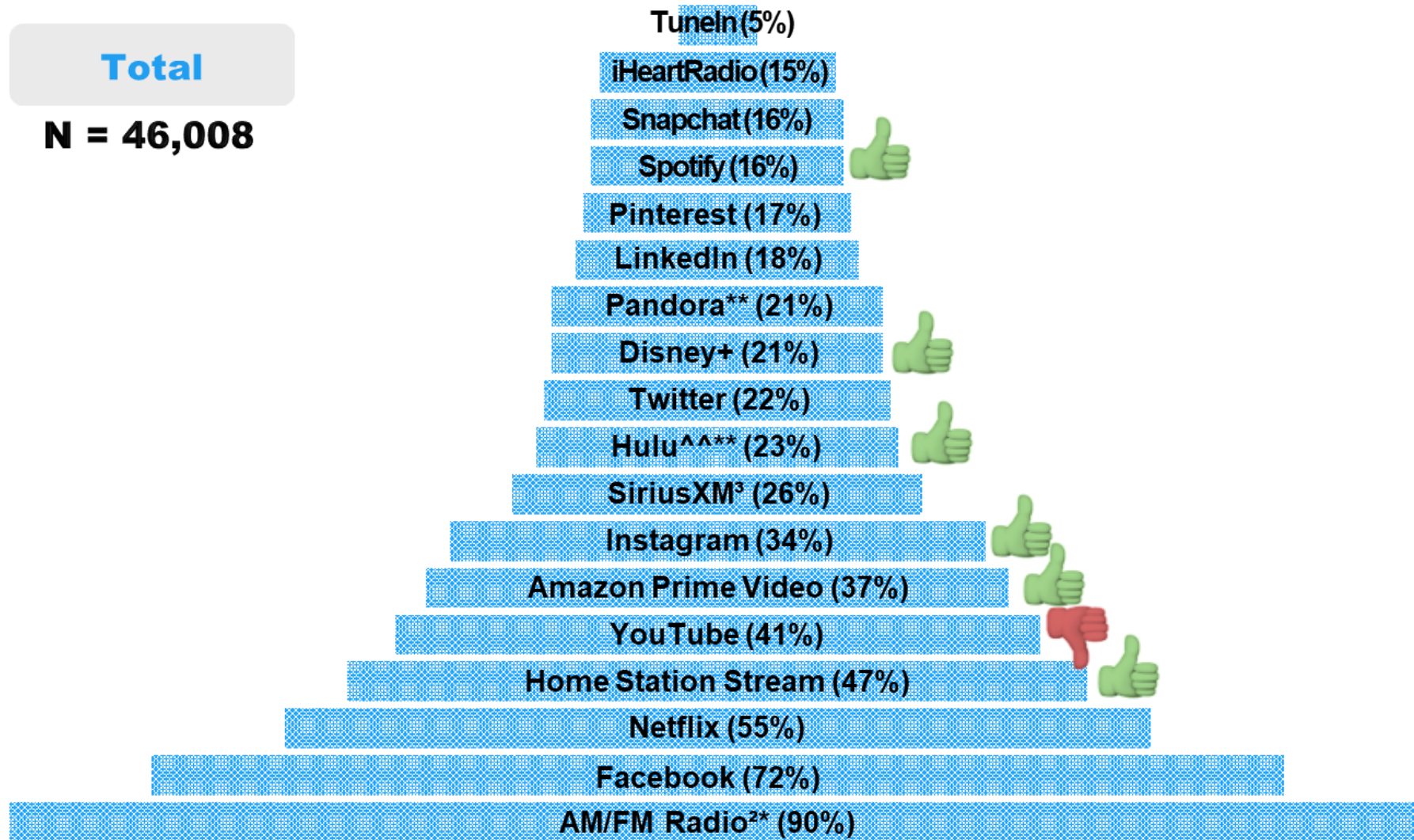
Brand Pyramids



Brand Pyramid 2020

Total

N = 46,008



Total
TS 2019

6%

17%

14%

12%

18%

17%

20%

22%

18%

26%

31%

30%

48%

42%

55%

71%

91%

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



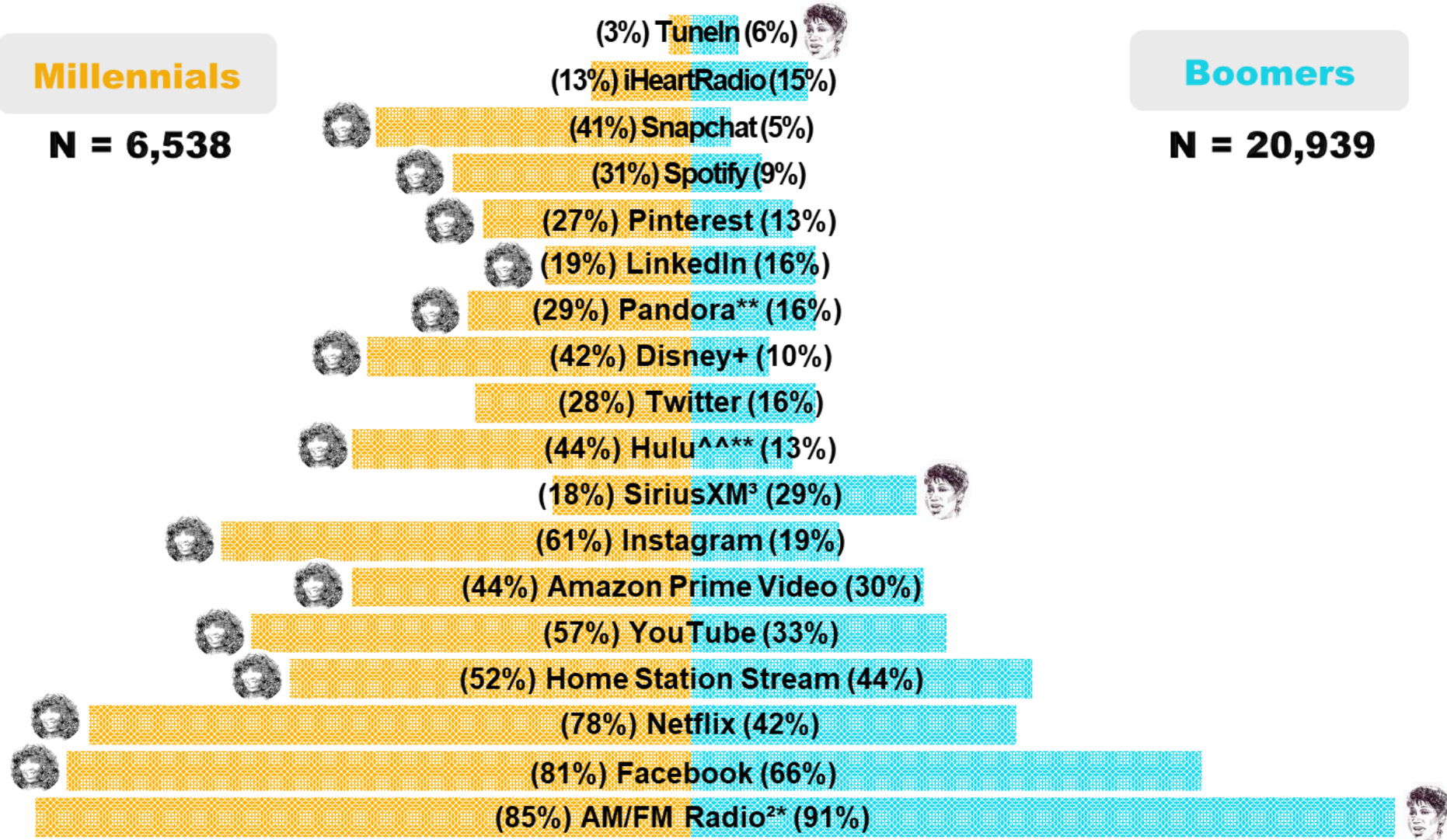
Brand Pyramid 2020

Millennials

N = 6,538

Boomers

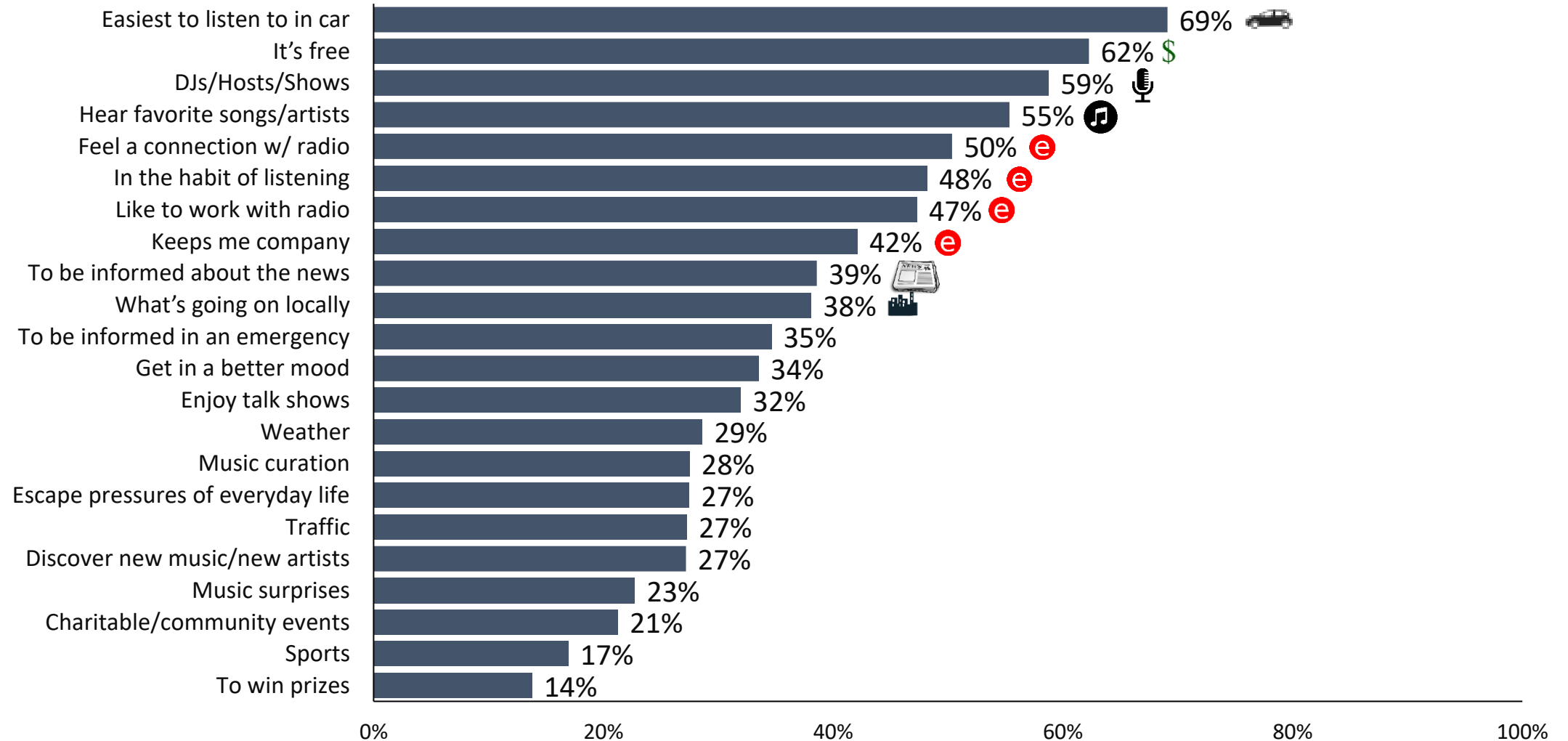
N = 20,939



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

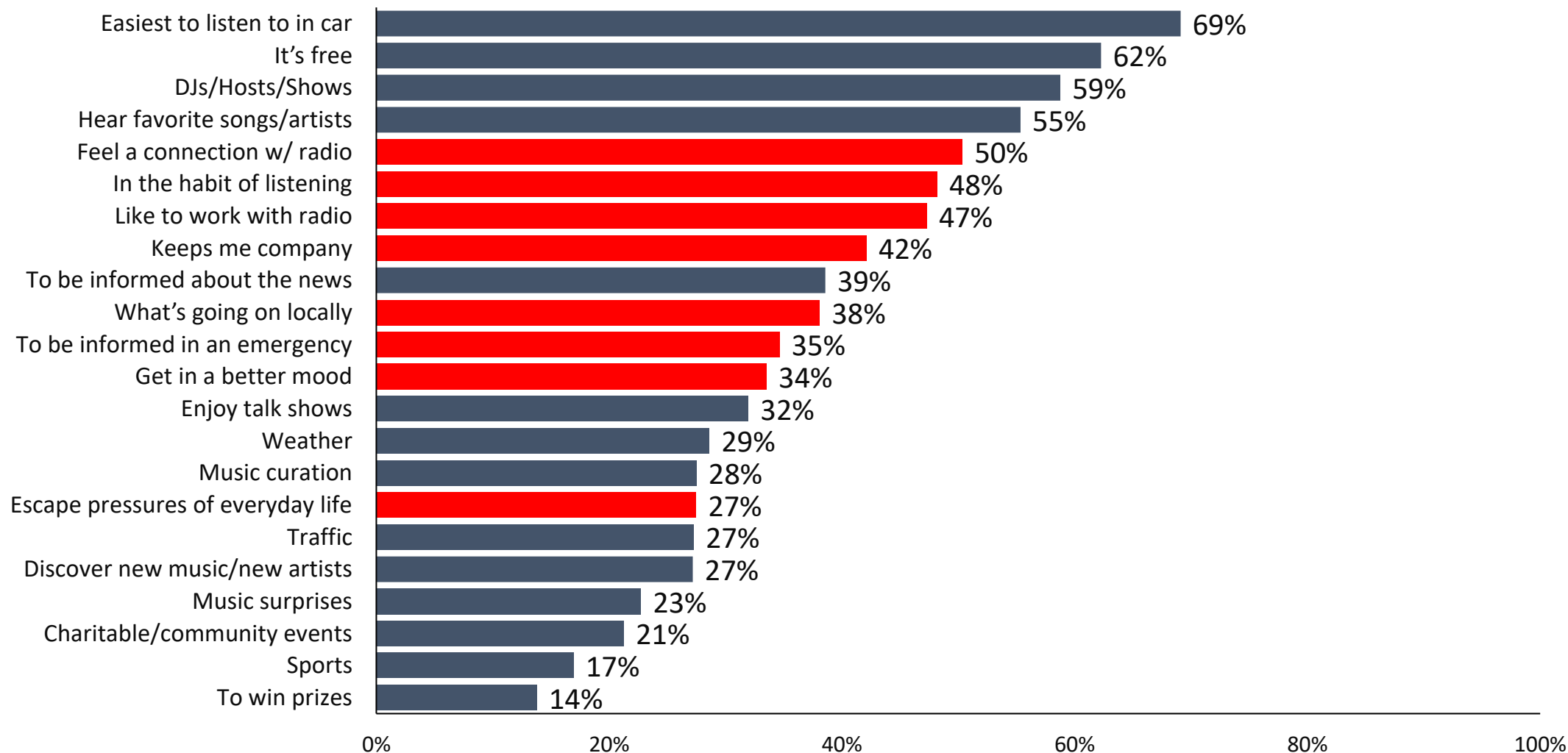


Main Reasons For Listening to AM/FM Radio

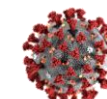


Among those who listen to AM/FM radio, % who say this is a main reason they listen

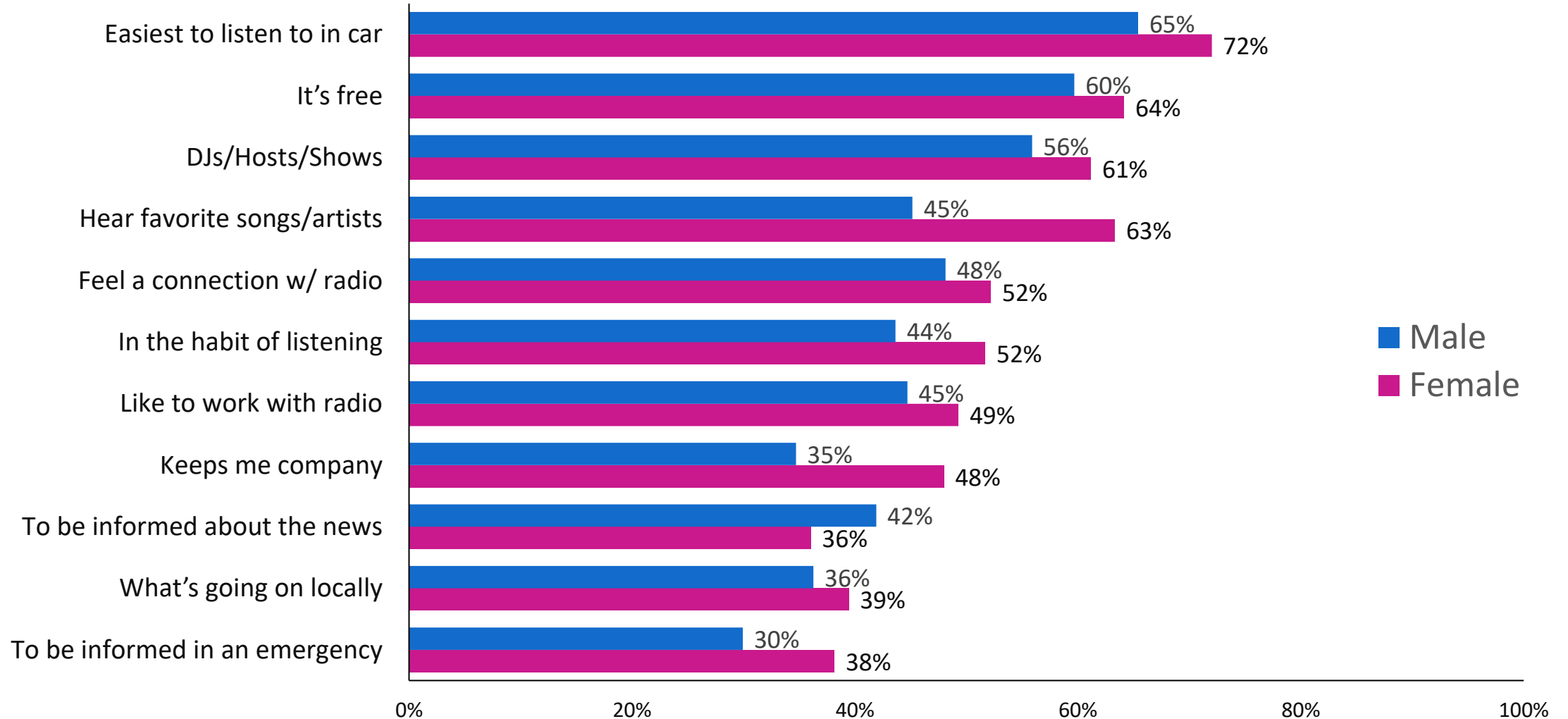
Why AM/FM Radio? It's the Emotional Benefits



Among those who listen to AM/FM radio, % who say this is a main reason they listen

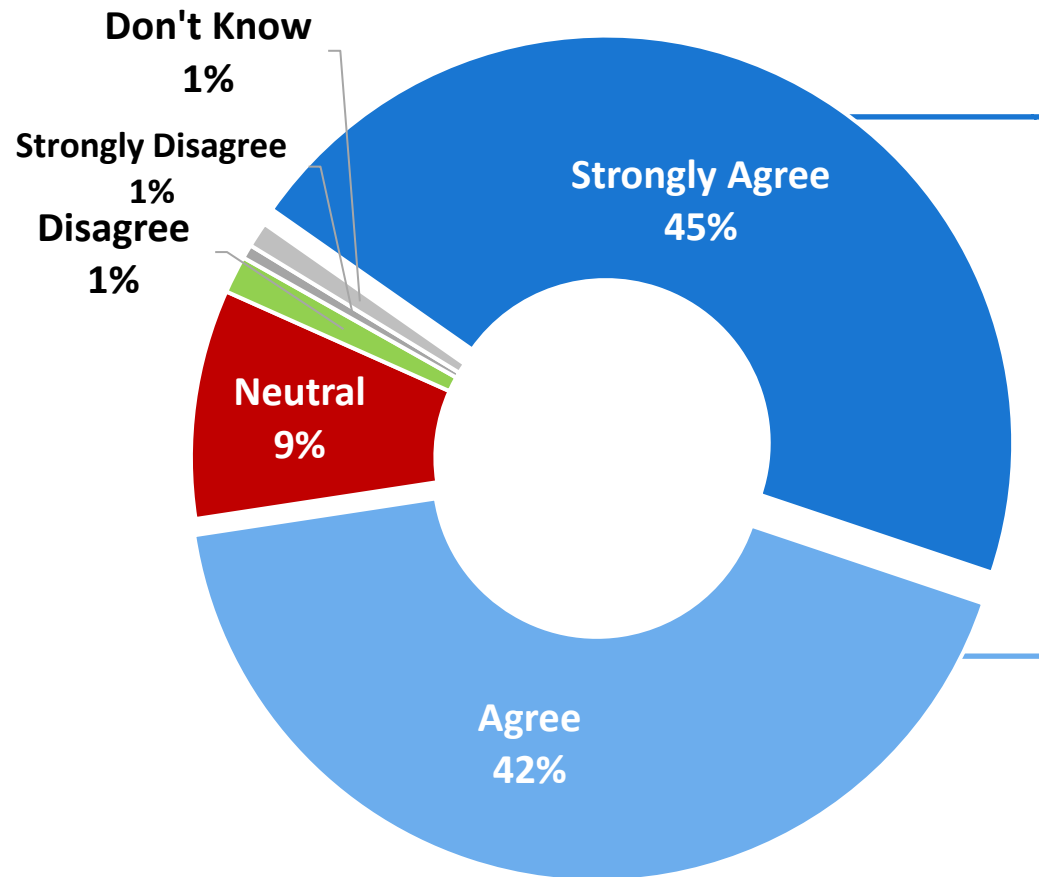


“Why Radio?” Female Scores Are Consistently Higher

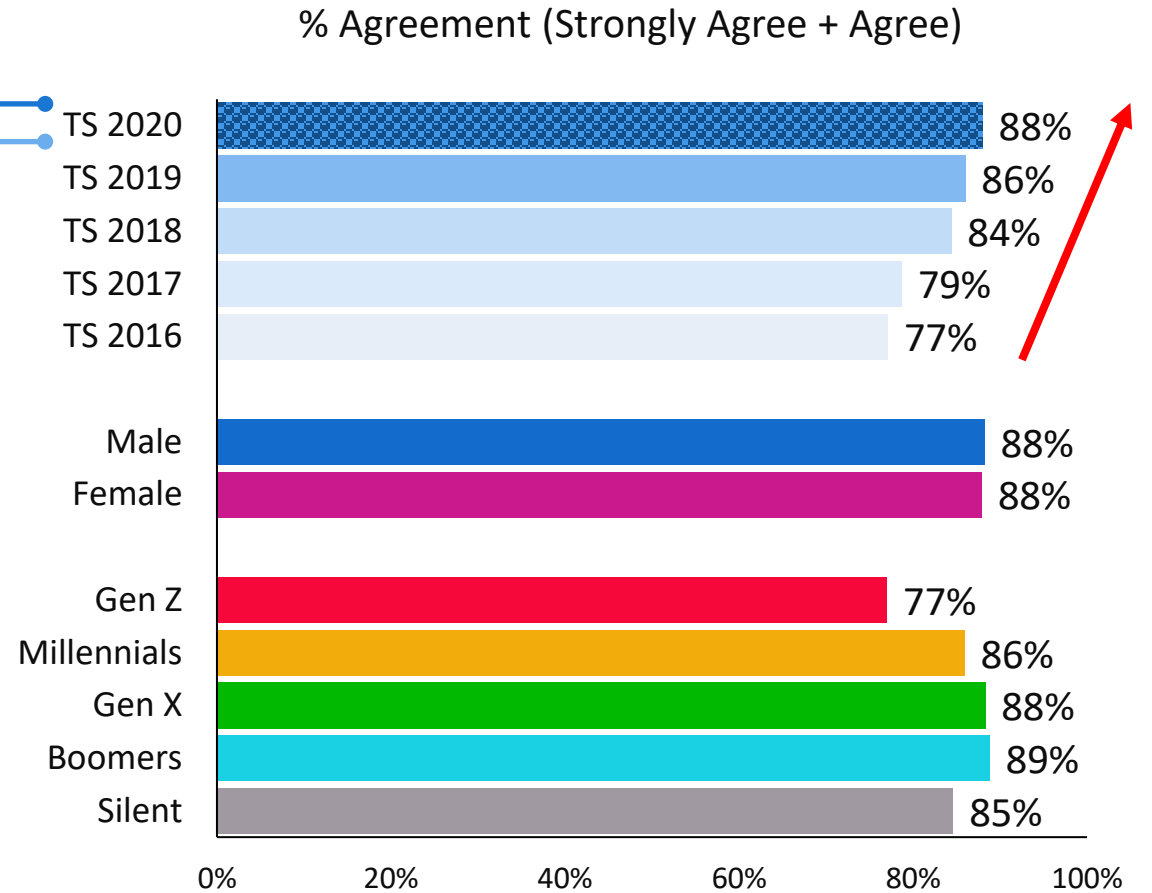


Among those who listen to AM/FM radio, % who say this is a main reason they listen

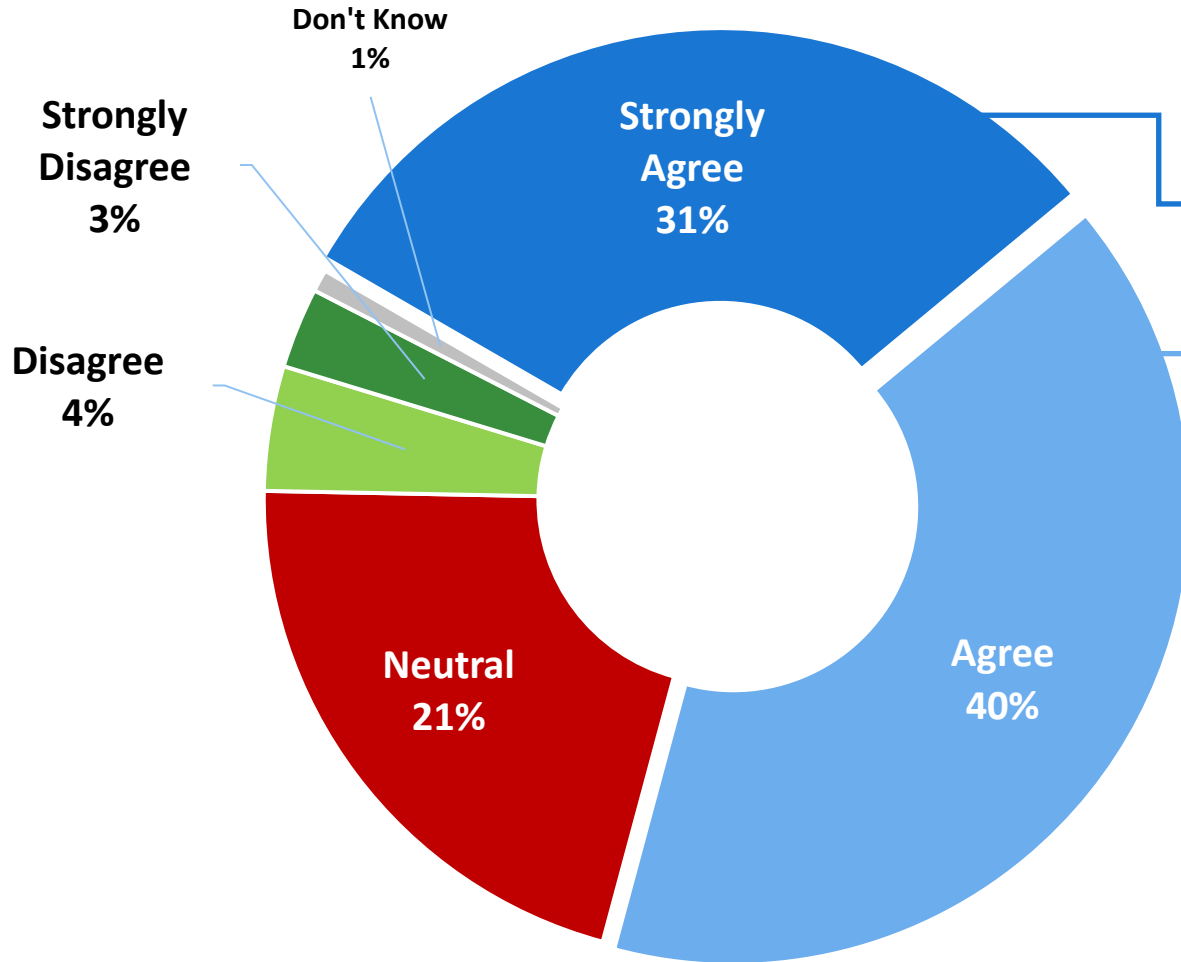
Radio's Local Orientation Continues to Grow in Importance, Part of Radio's "Secret Sauce"



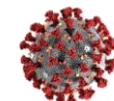
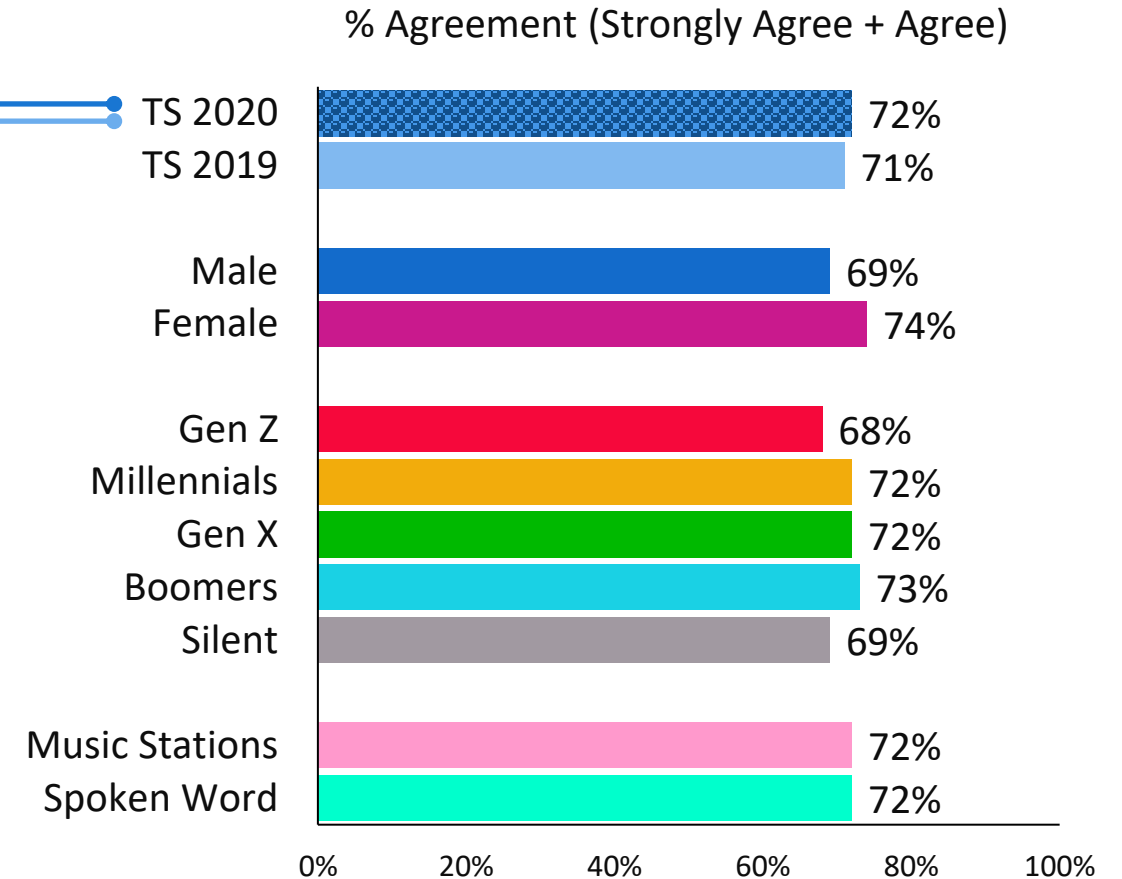
"One of radio's primary advantages is its local feel"



Seven in Ten Feel a Connection to Their Home Station

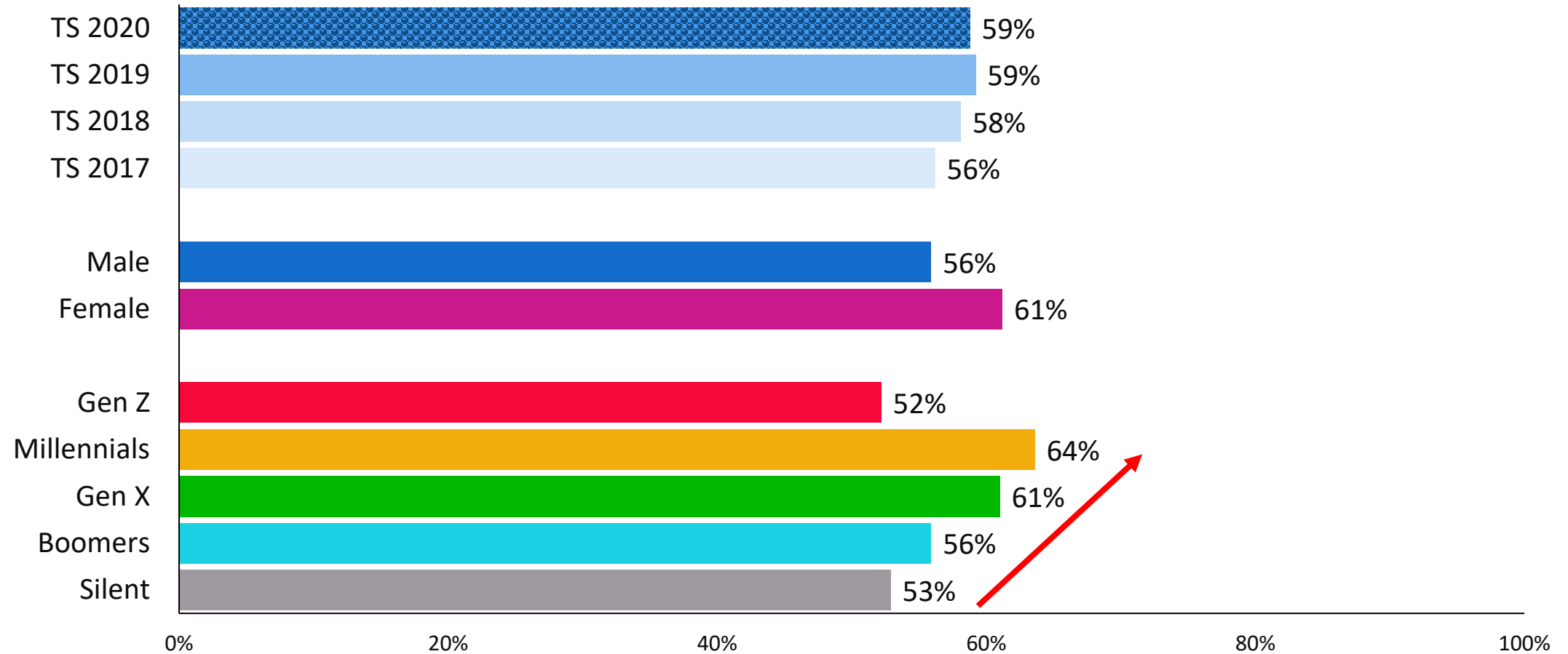


*"I really feel a sense of connection to
THE STATION THAT SENT ME THIS SURVEY"*

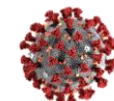


Six in Ten Say Personalities Are a Main Reason They Listen

"I Like Particular DJs, Shows, or Hosts"



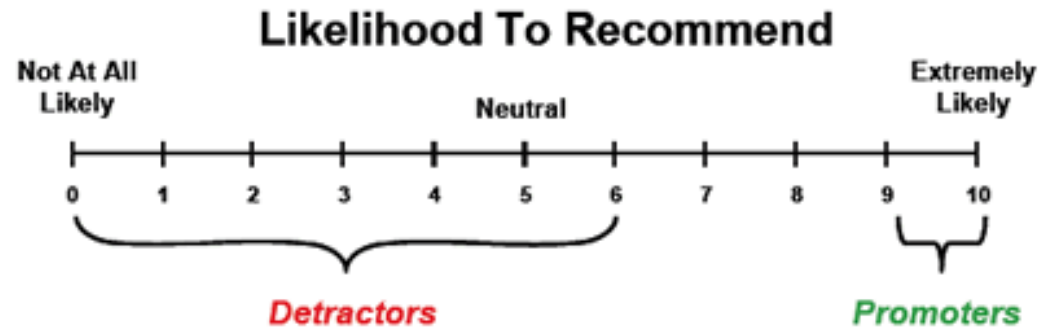
Among those who listen to AM/FM radio,
% who say this is a main reason they listen





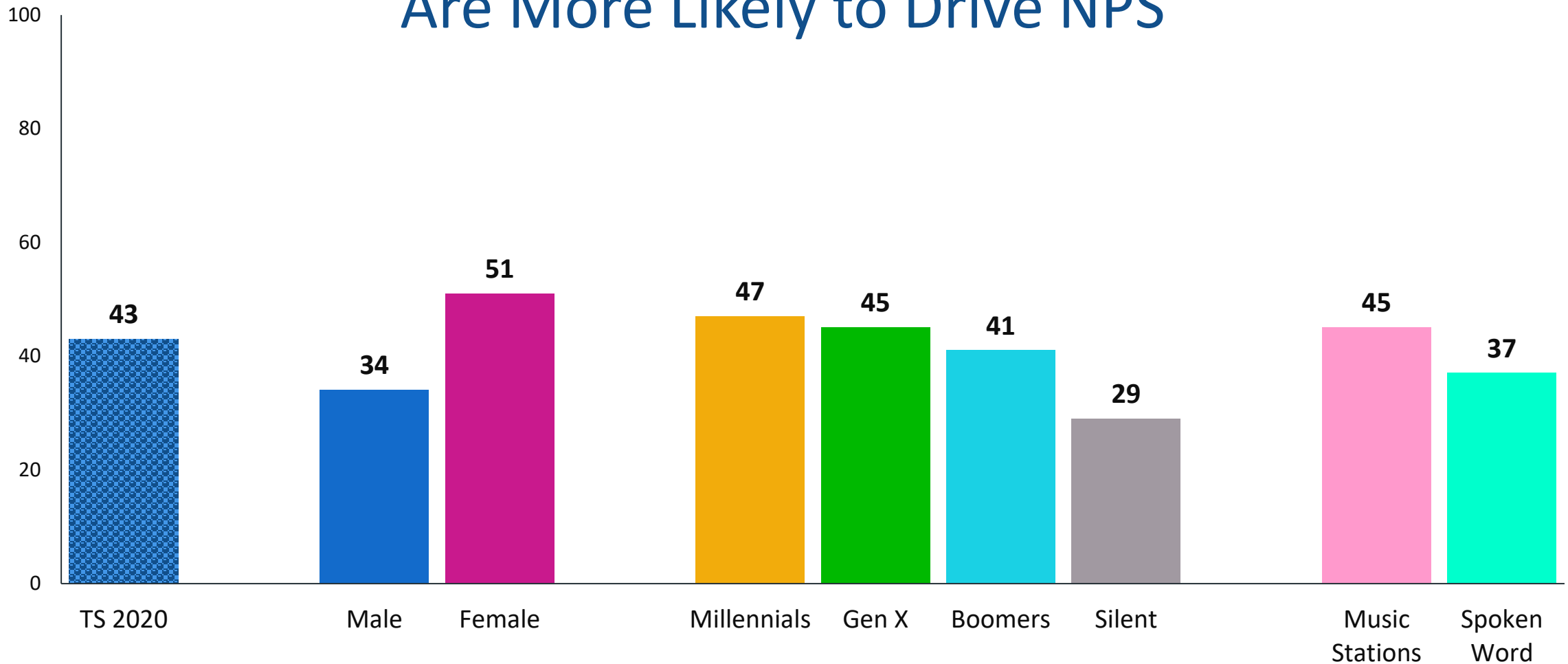
Word of Mouth

NET PROMOTER

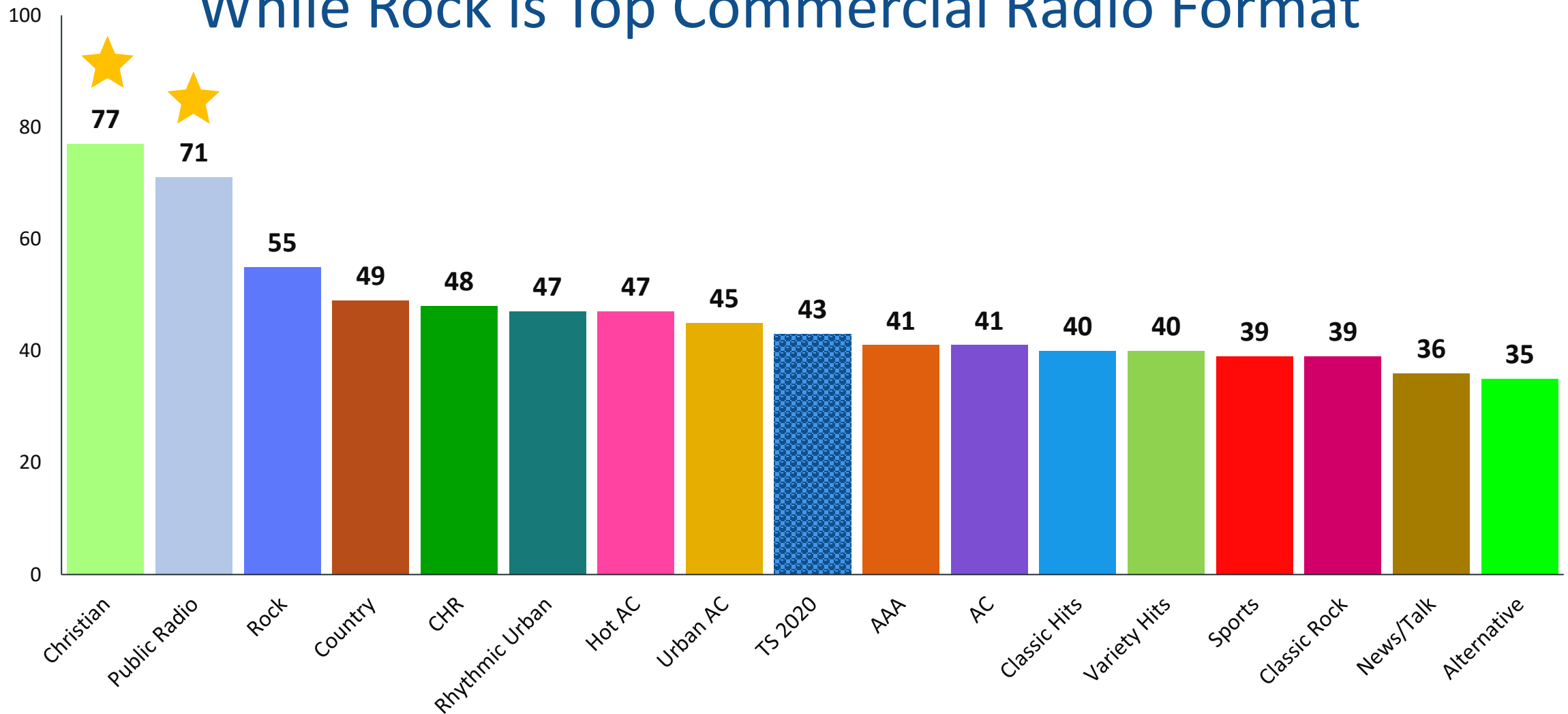


$$\% \text{ Promoters} - \% \text{ Detractors} = \text{Net Promoter Score}$$

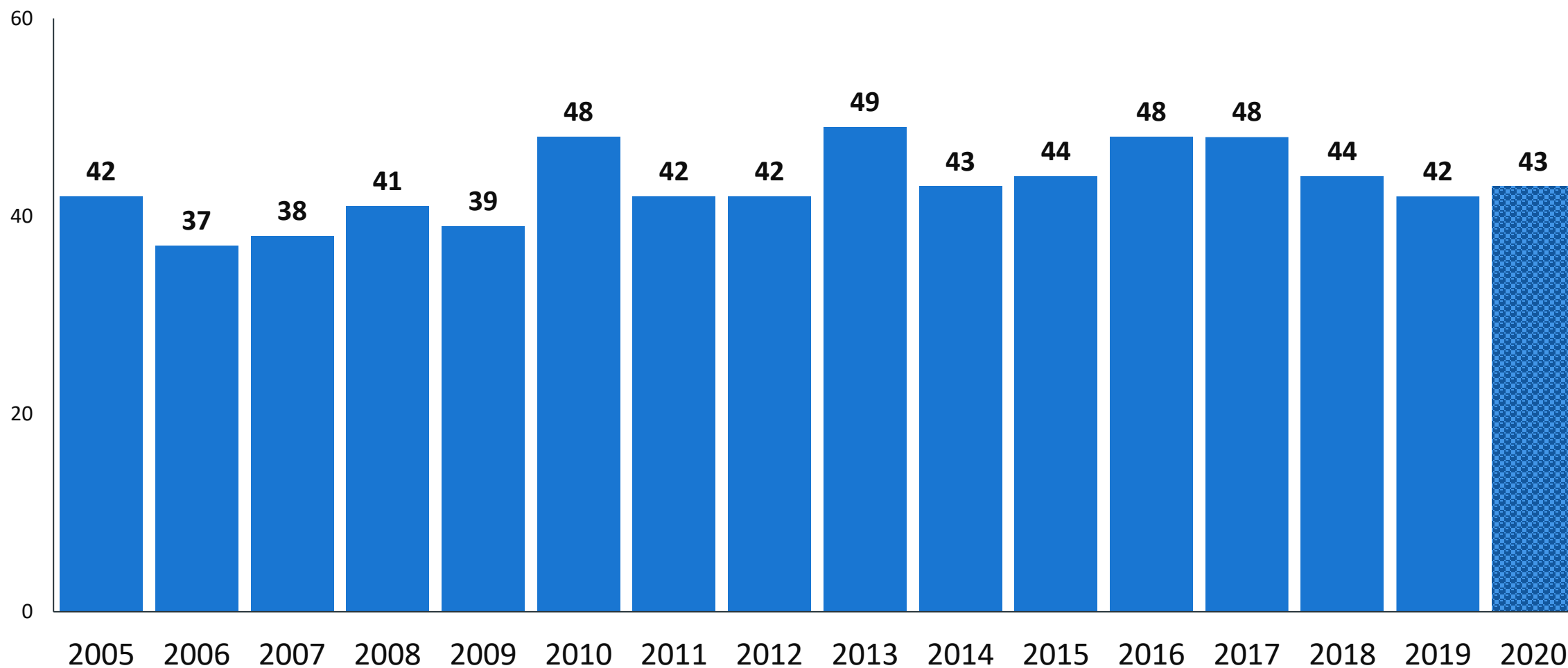
Women, Younger Demos, & Music Fans Are More Likely to Drive NPS



Christian & Public Radio Lead NPS, While Rock is Top Commercial Radio Format



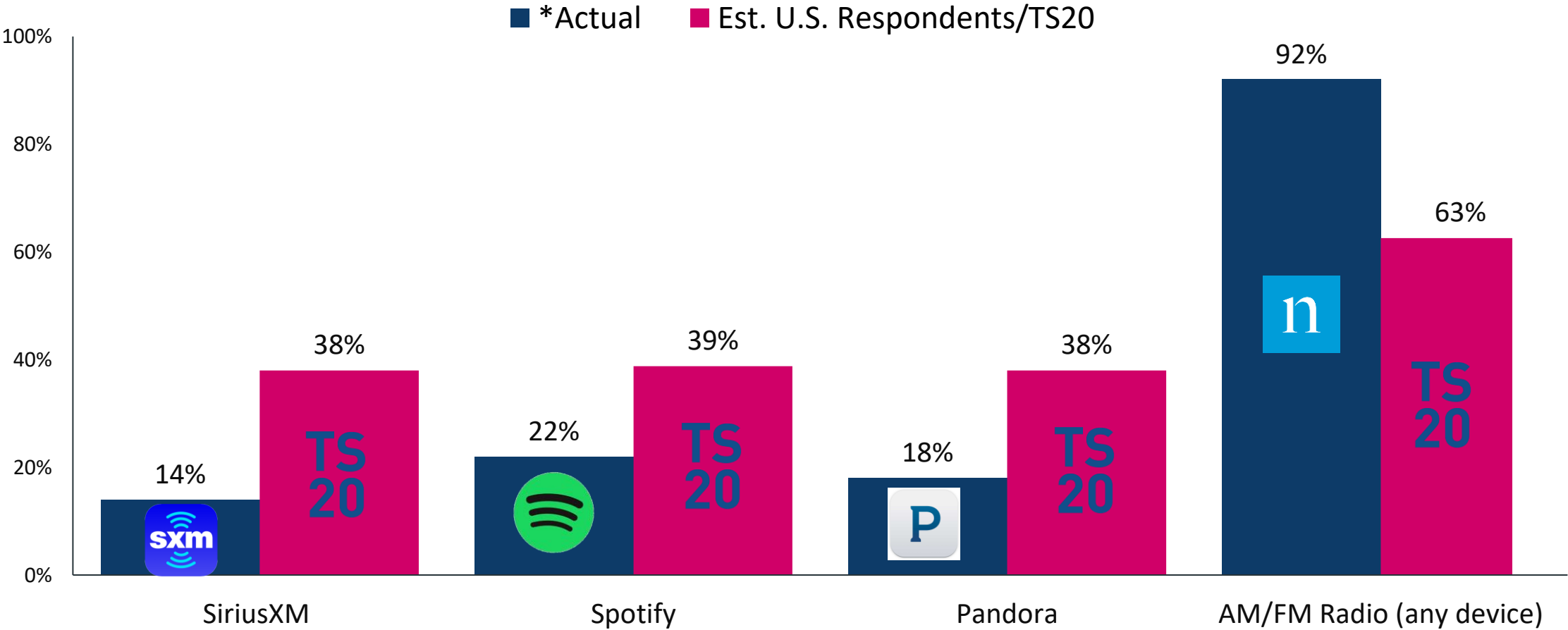
Commercial Radio's NPS Holds Steady Over the Past 16 Years





Audio Platforms: Perception vs. Reality

Radio Listeners Underestimate Overall U.S. Adult AM/FM Radio Listening (and Overestimate Streaming Audio/SiriusXM)

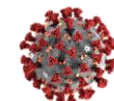
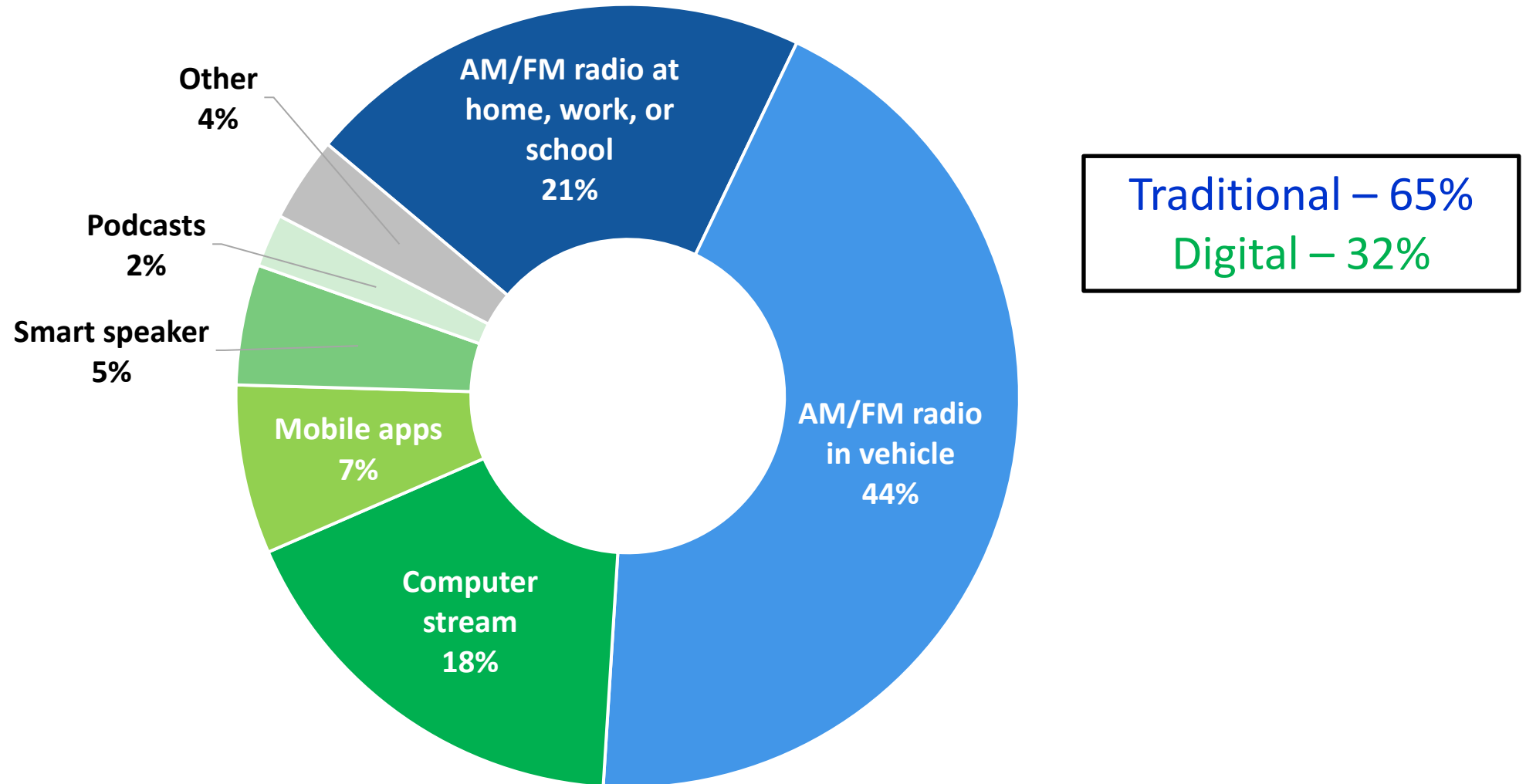


*Among U.S. respondents, Jacobs data is estimated weekly 18+ U.S. population
Actual Spotify/Pandora data for Infinite Dial 2020 are 12+, courtesy Edison Research/Triton Media
SiriusXM data among subscribers as of 12/19; Nielsen 18+ adults

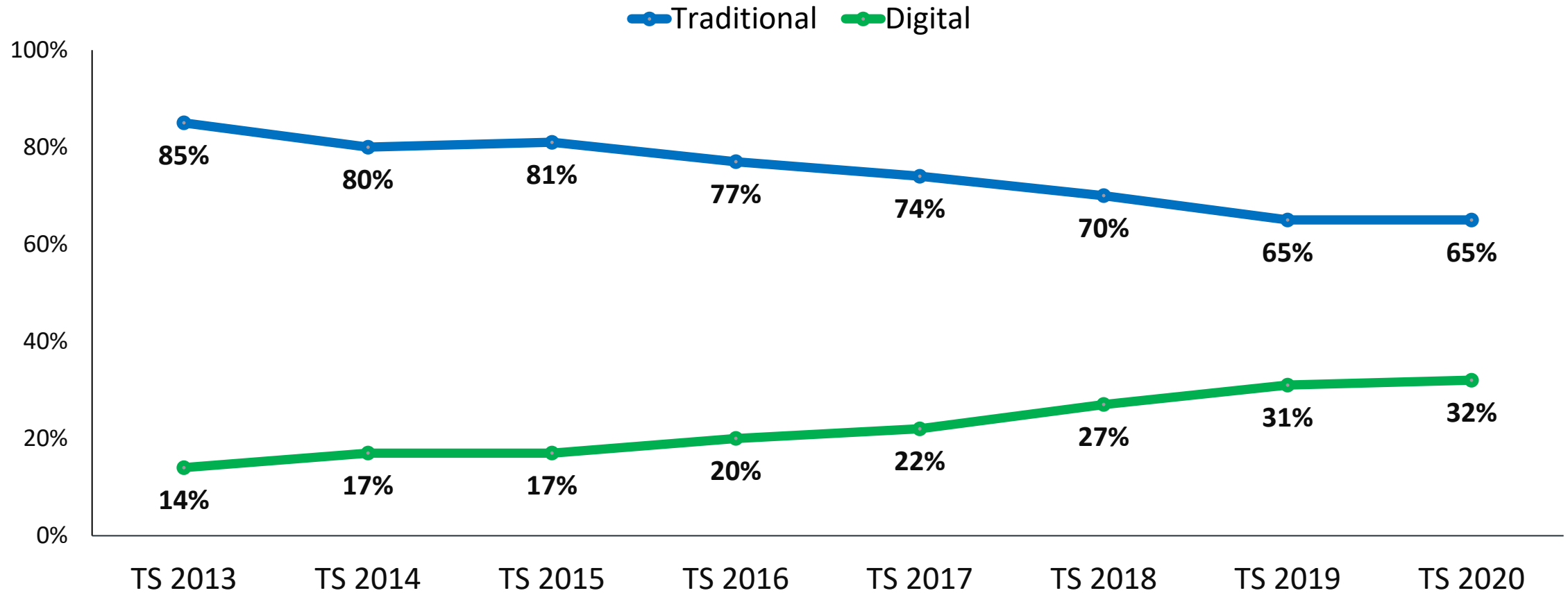


Station Listening Platforms

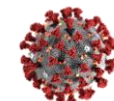
How Do People Listen to Their Favorite Radio Stations?



Home Station Listening Platform Trend: Traditional vs. Digital

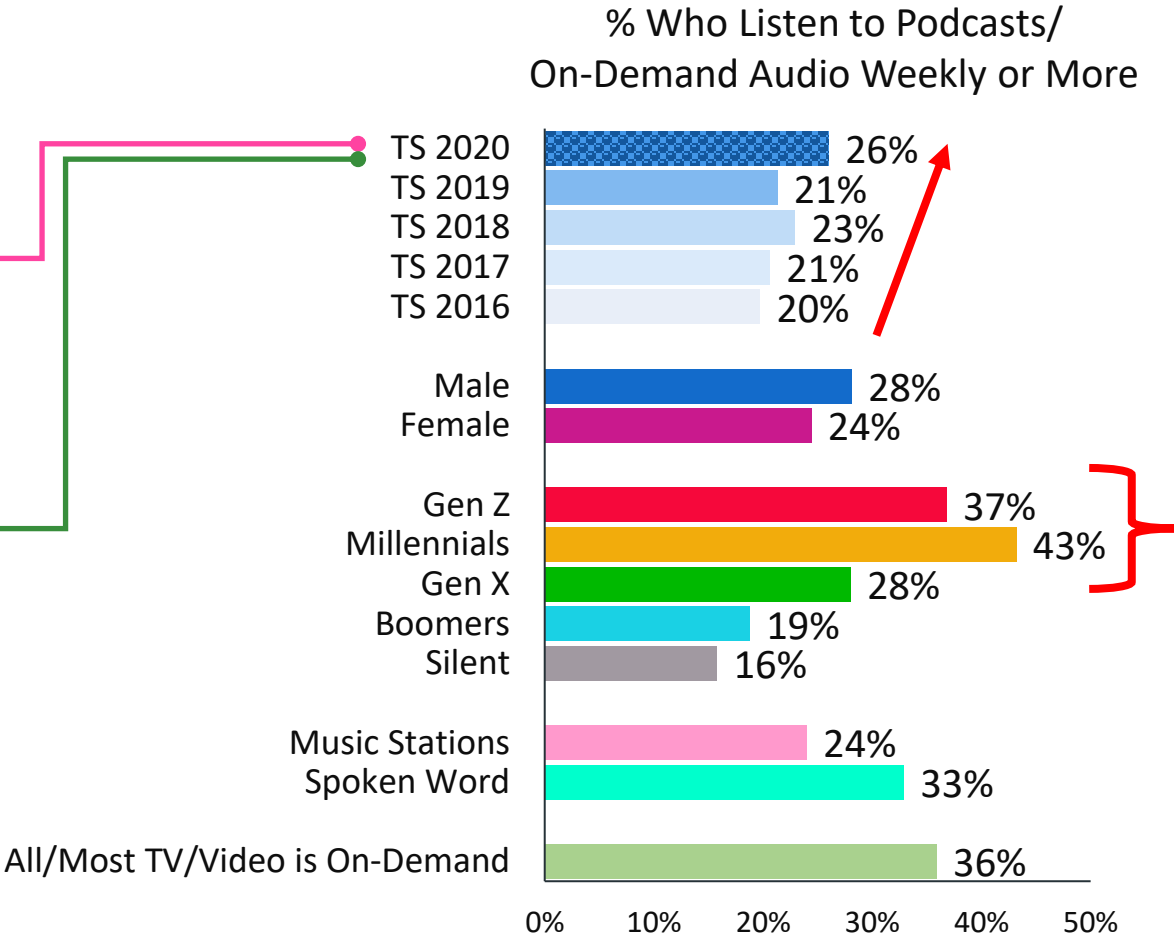
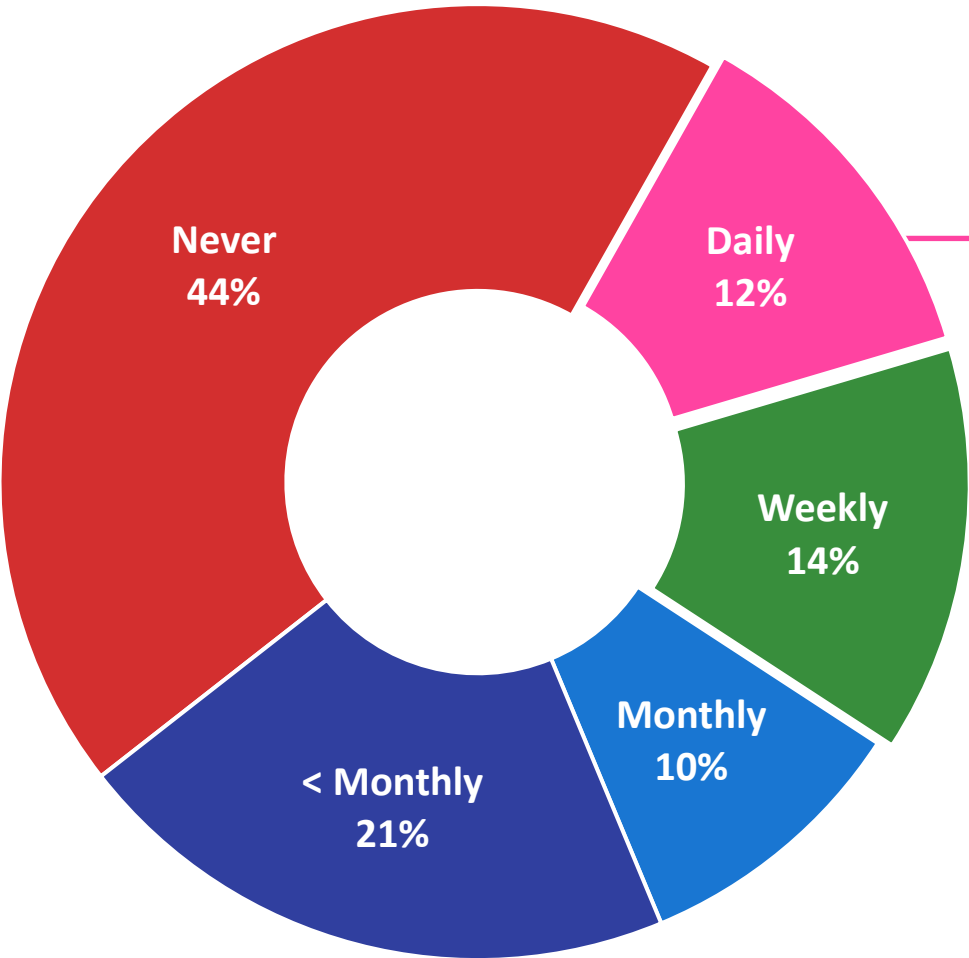


% of time spent with home station in a typical week via
traditional platforms (an AM/FM radio at home/school/work or in a vehicle)
vs. digital platforms (computer, mobile, smart speaker, podcasts)

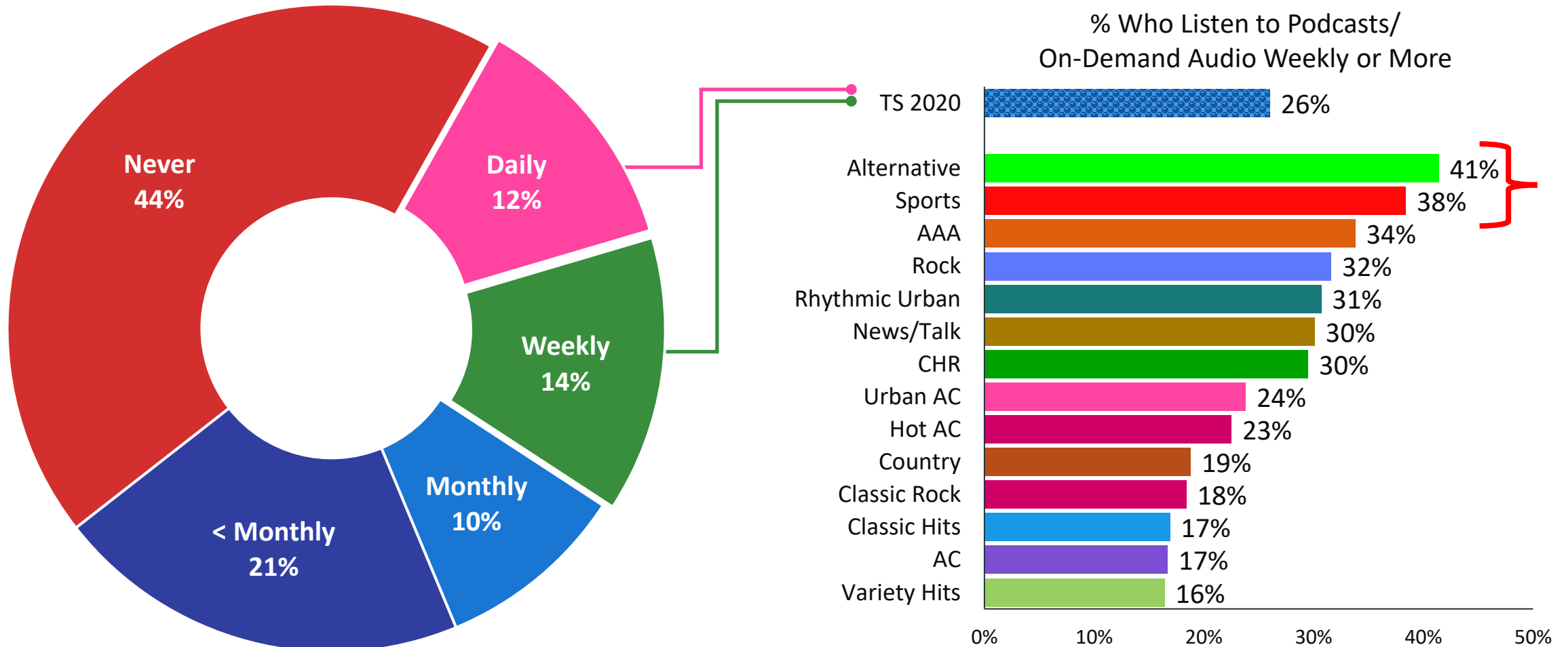




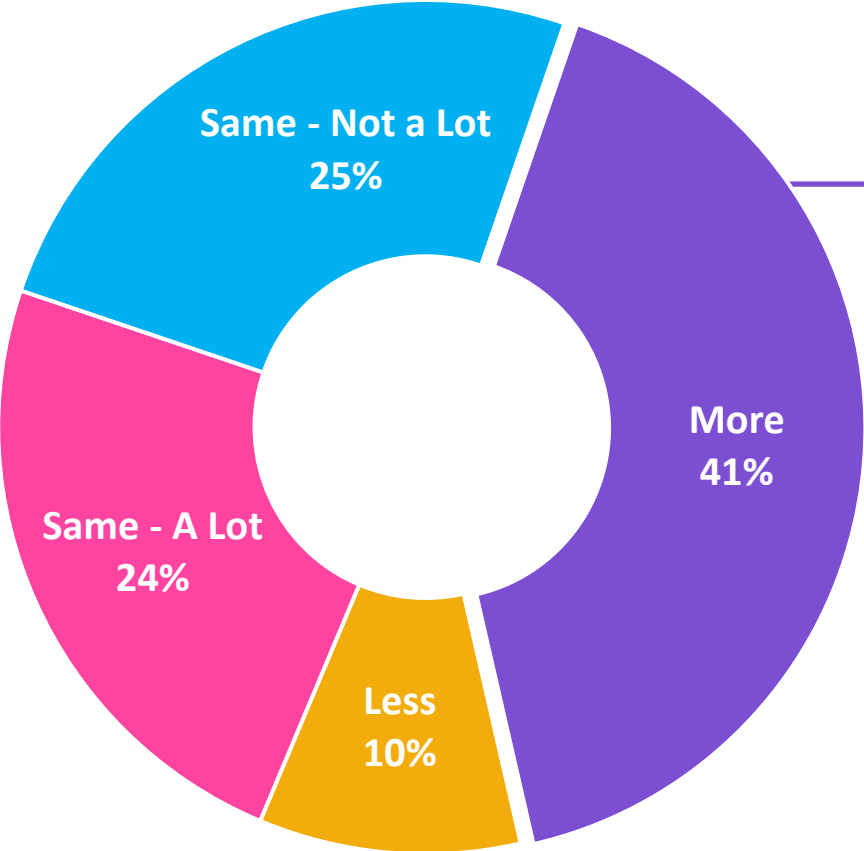
More Than One in Four Now Listens to Podcasts Weekly or More, Led By Gen Z, Millennials, and Spoken Word Fans



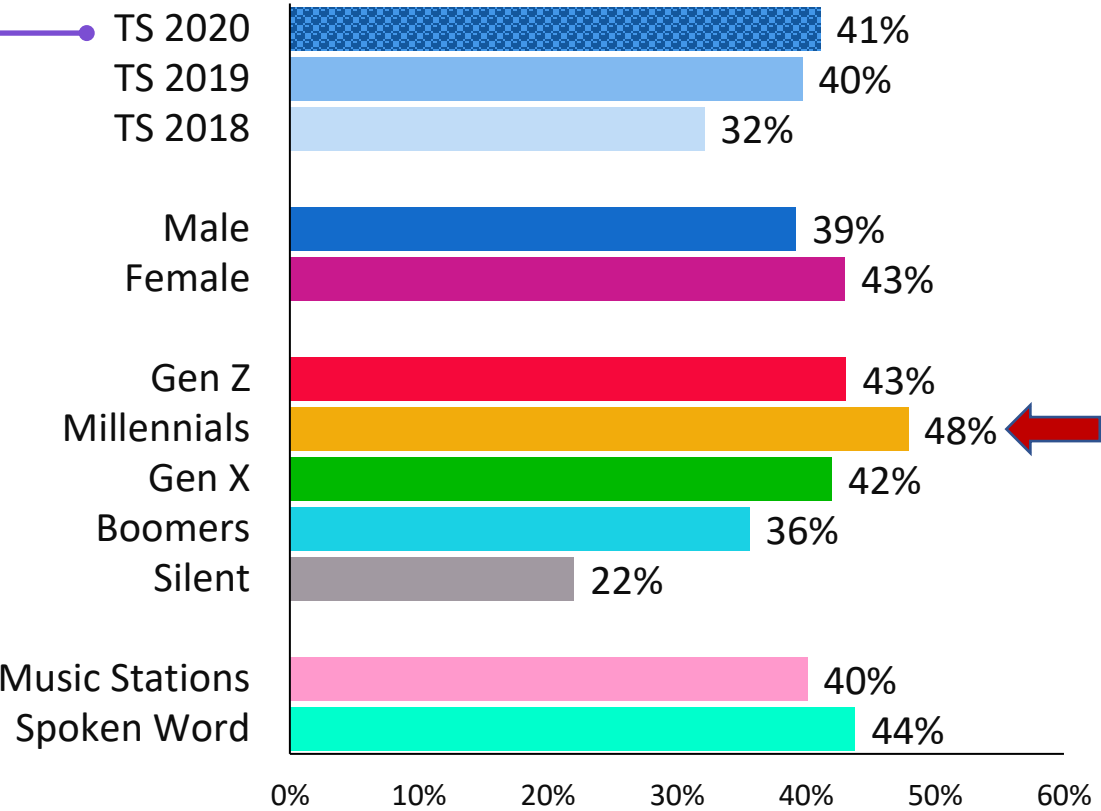
Alternative and Sports Radio Fans Lead the Way for Weekly Podcast Listening



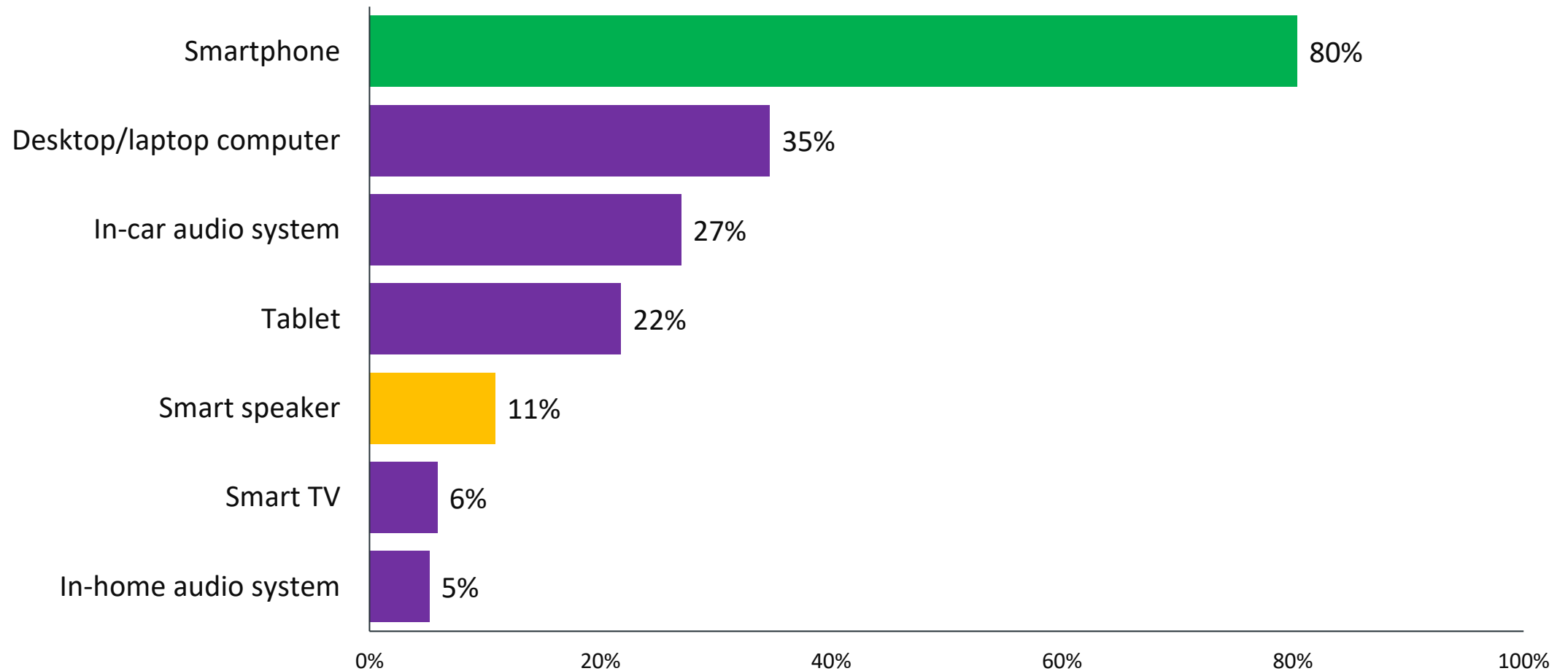
Podcasts Are Addicting, Especially For Millennials



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



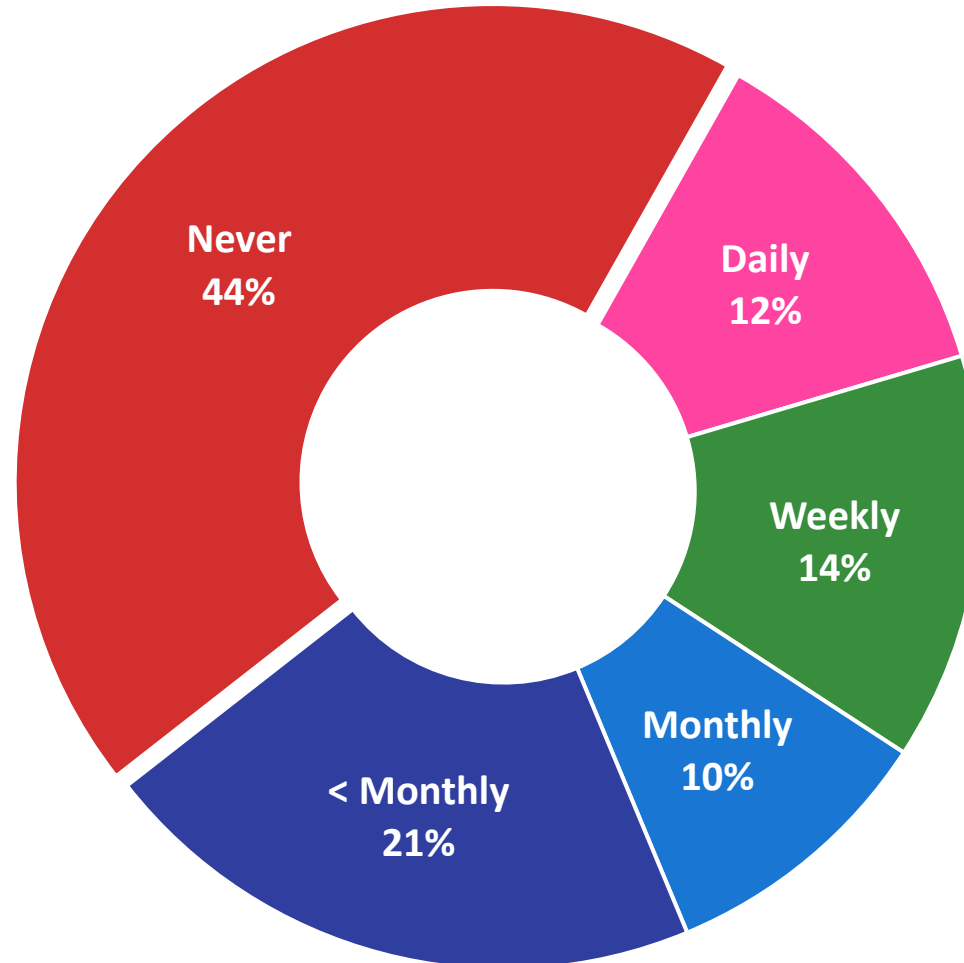
Smartphones Are the Dominant Listening Platform Among Weekly Podcast Listeners, Followed by Computers



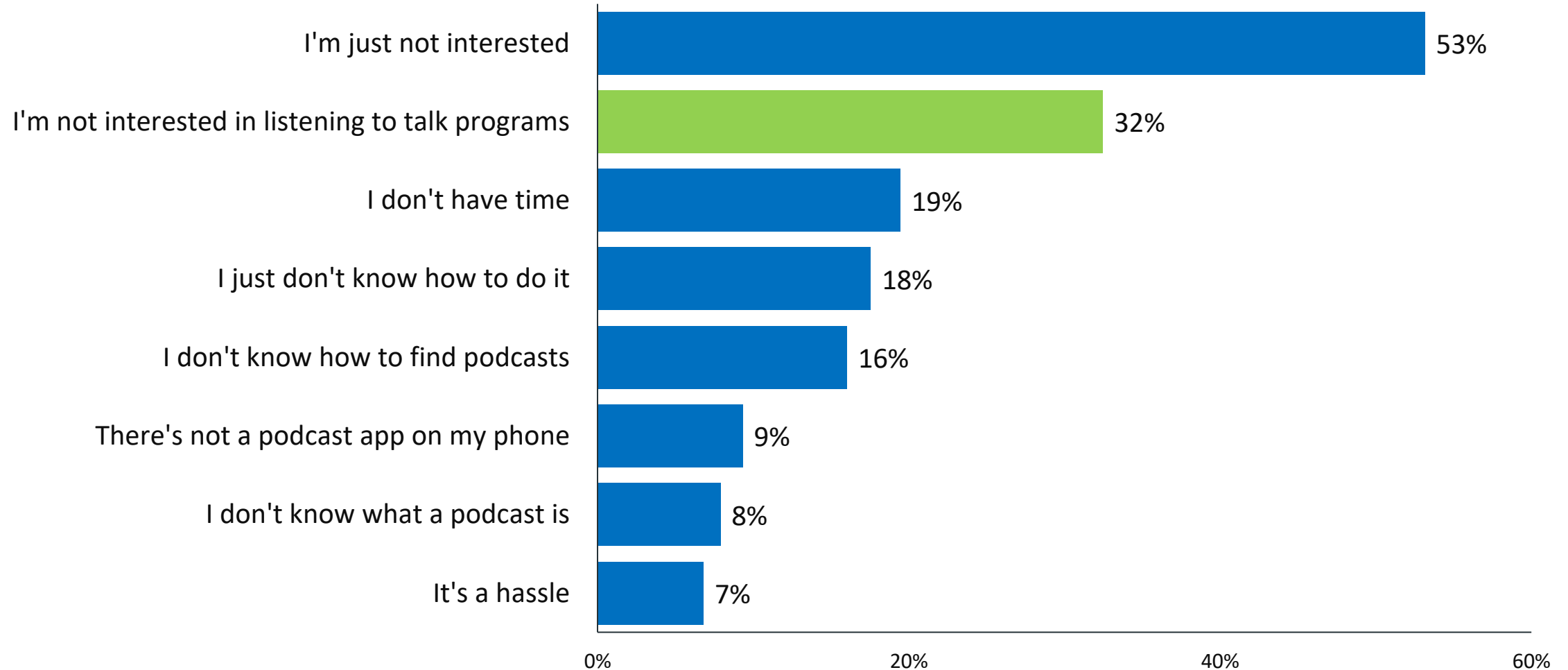
Among weekly podcast listeners, % who regularly listen to podcasts using each device

What About All Those “Podcast Nevers?”

% Who Listen to Podcasts/On-Demand Audio...

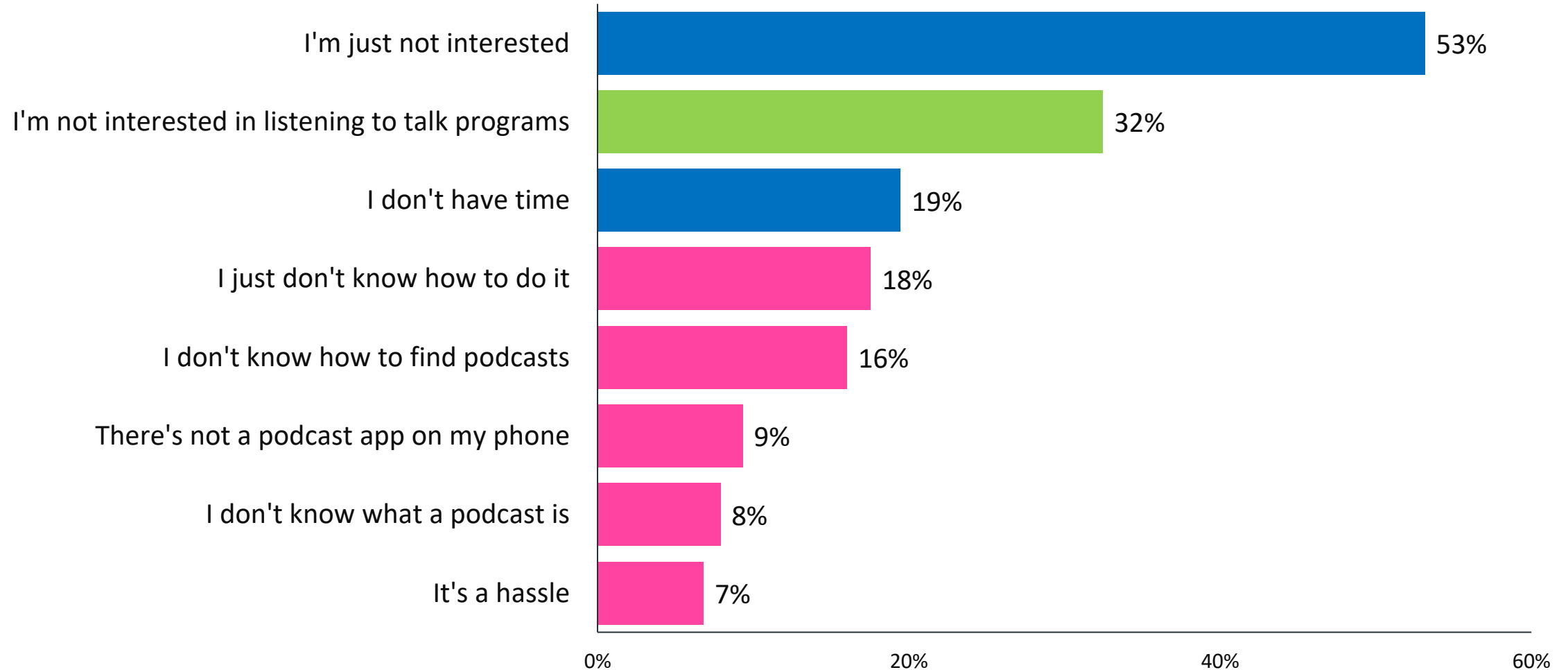


Lack of Interest in Podcasts and Talk Top the List For Why So Many Are “Podcast Nevers”



Among those who never listen to podcasts, % mentioning each as a reason they don't listen

Among “Podcast Nevers,” Podcasting Has Technical Issues



Among those who never listen to podcasts, % mentioning each as a reason they don't listen



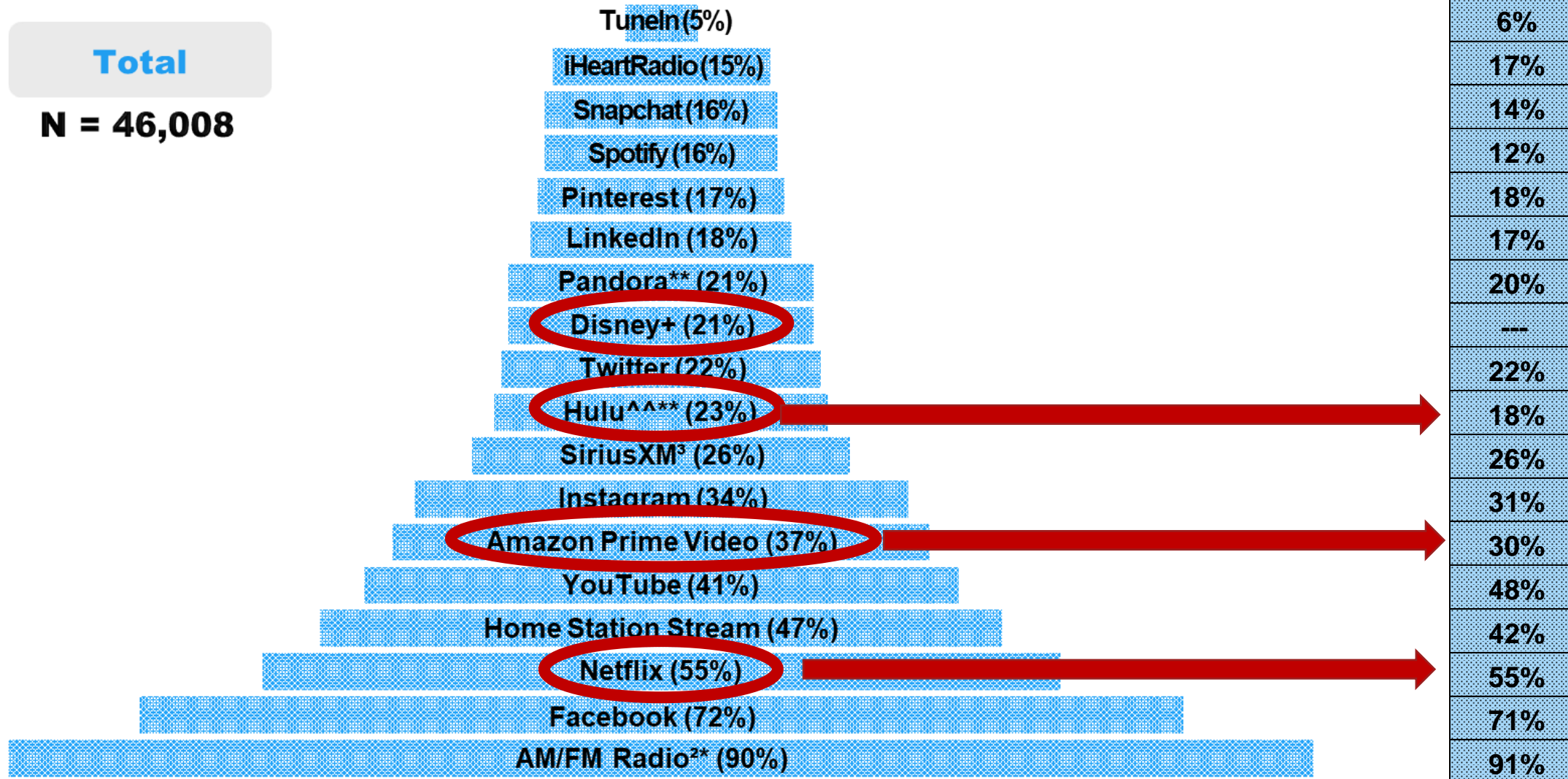
Audio & Video Streaming



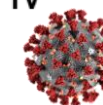
Brand Pyramid 2020

Total

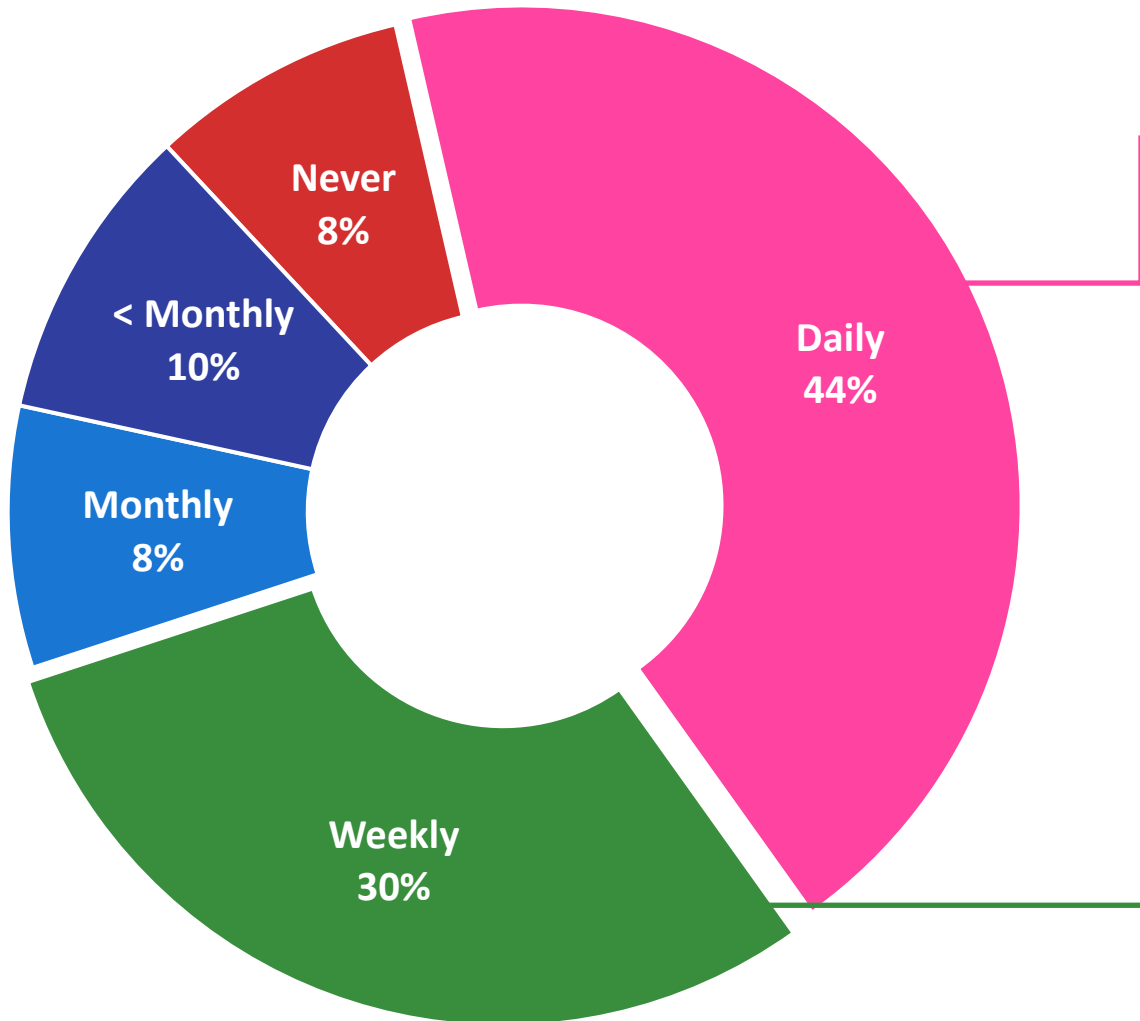
N = 46,008



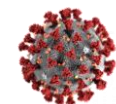
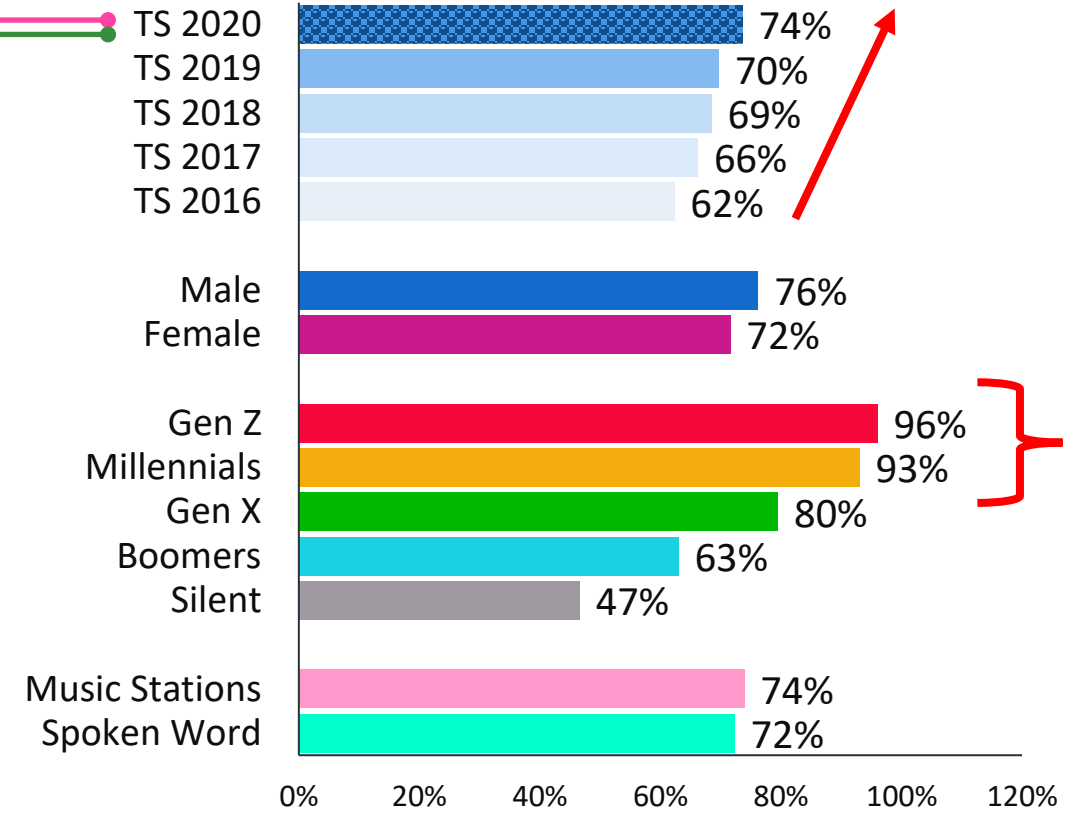
All weekly use unless noted ² 1+ hour per day ³ Paid & trial users *Any Platform/Device **Excluding Canada ^^Includes Live TV



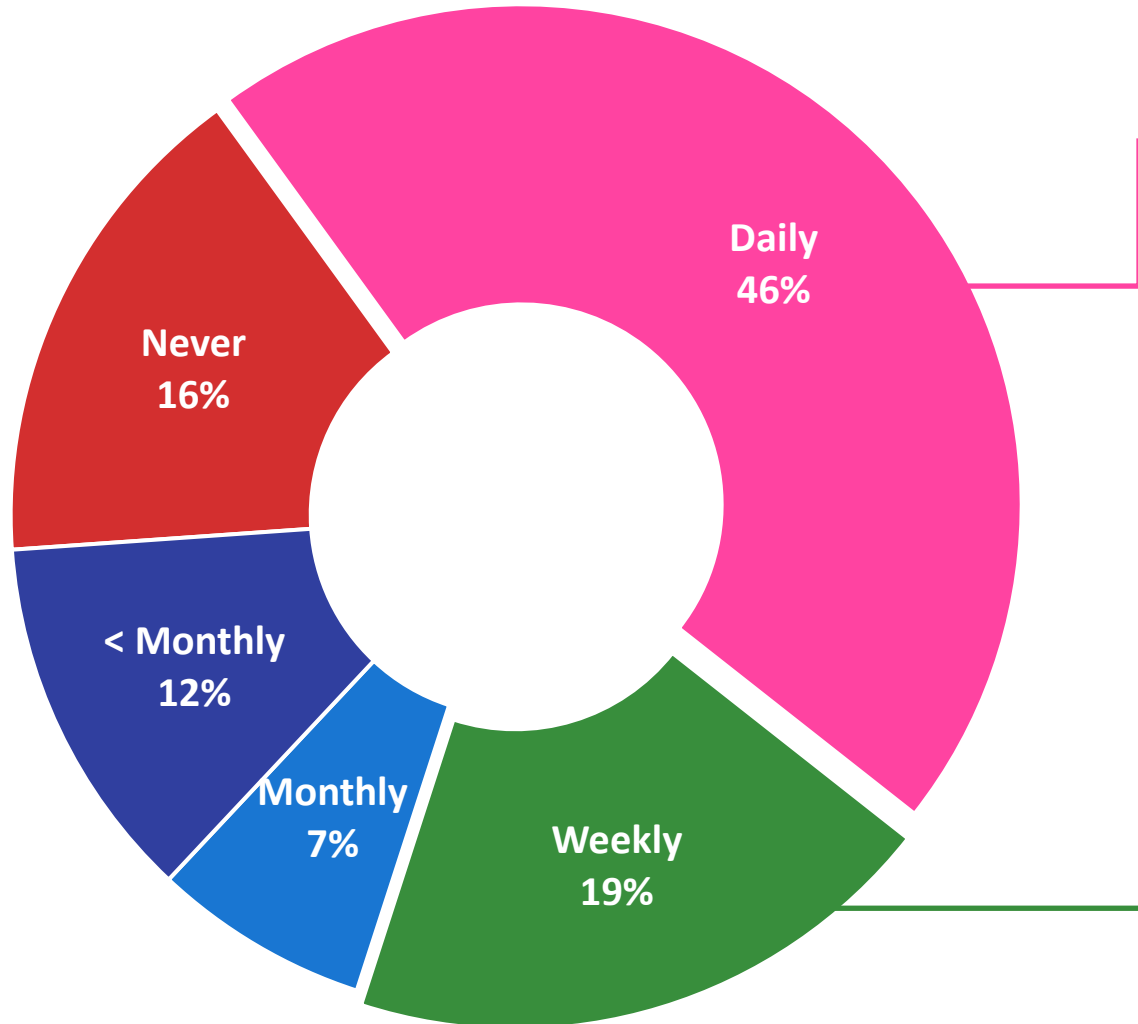
More Than Four in Ten Watch Streaming Video Daily; Weekly Usage Is Now Up to Three in Four



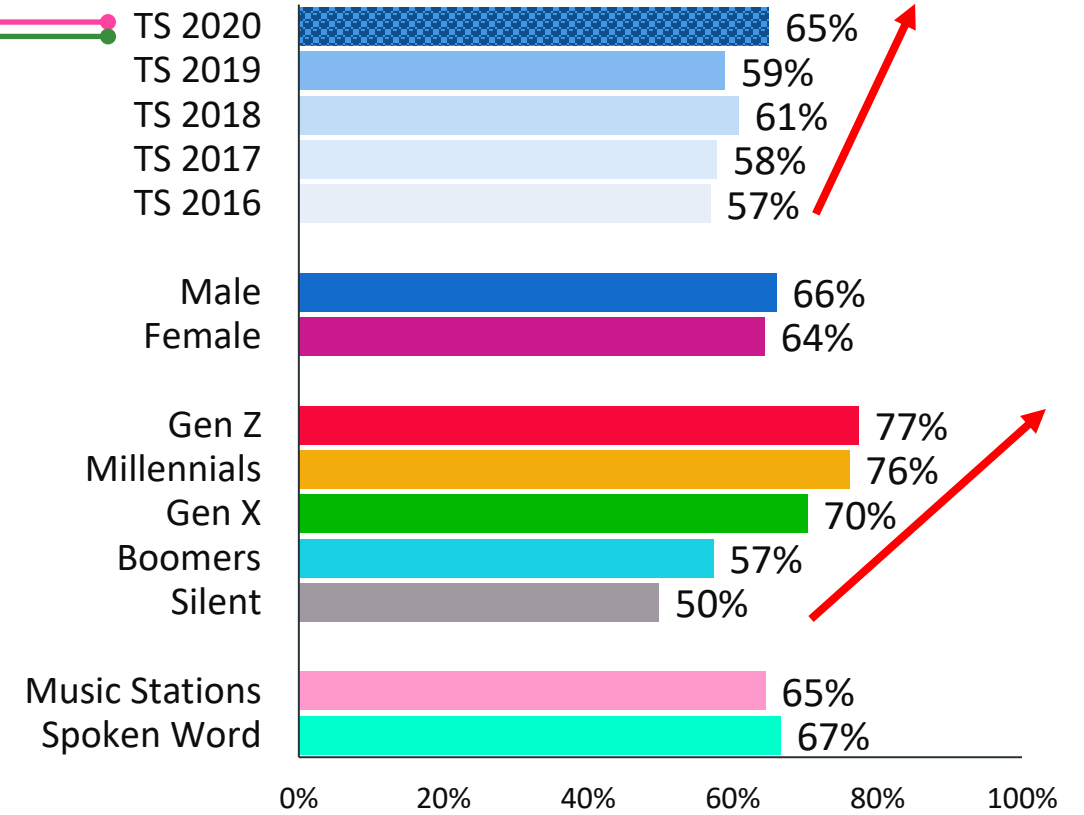
% Who Watch Streaming Video Weekly or More



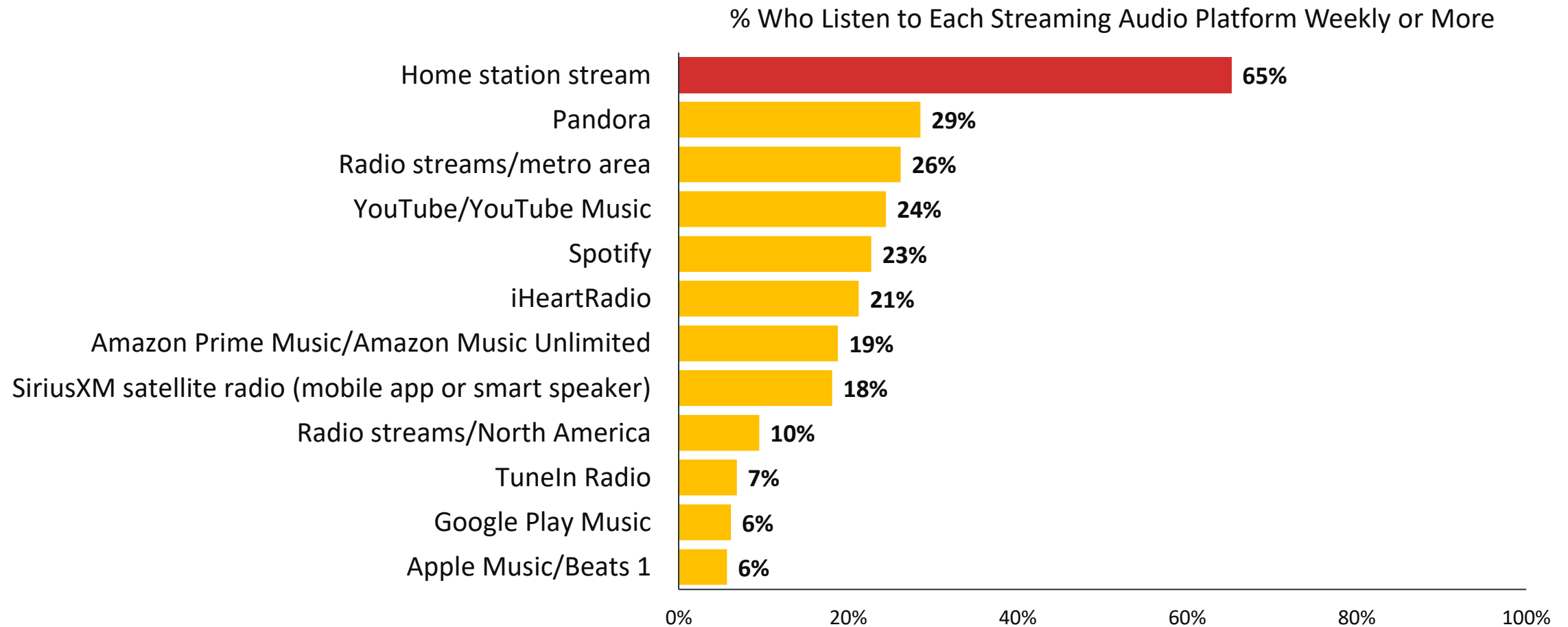
Just Under Half Listen to Streaming Audio Daily; Weekly Usage Jumps Year-Over-Year & Skews Young



% Who Listen to Streaming Audio Weekly or More



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



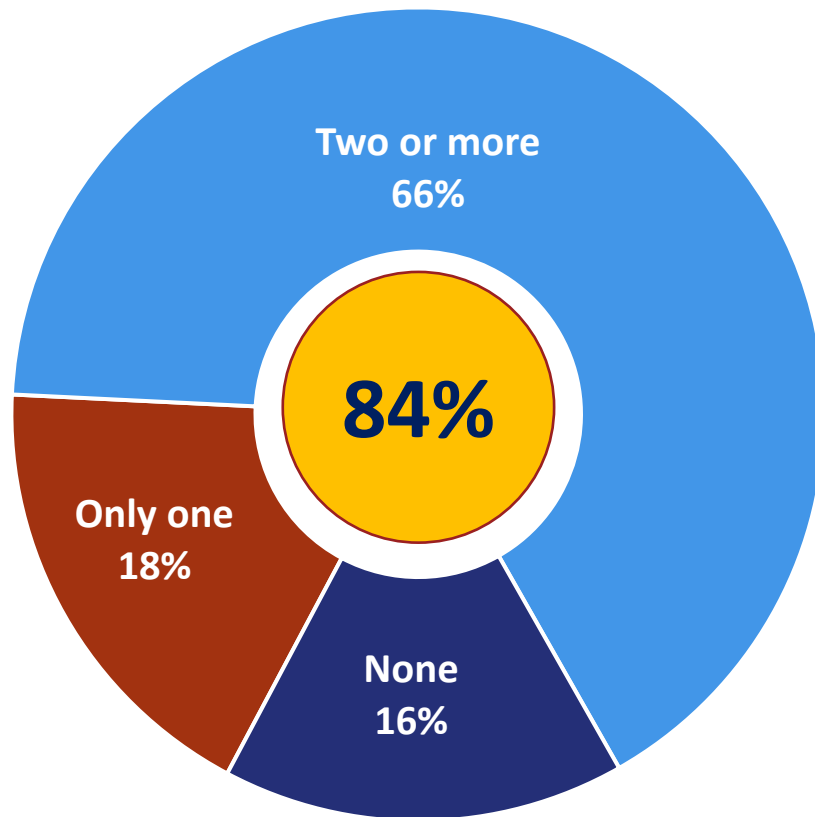
Among those who listen to streaming audio monthly or more
(platforms 6% and higher shown)



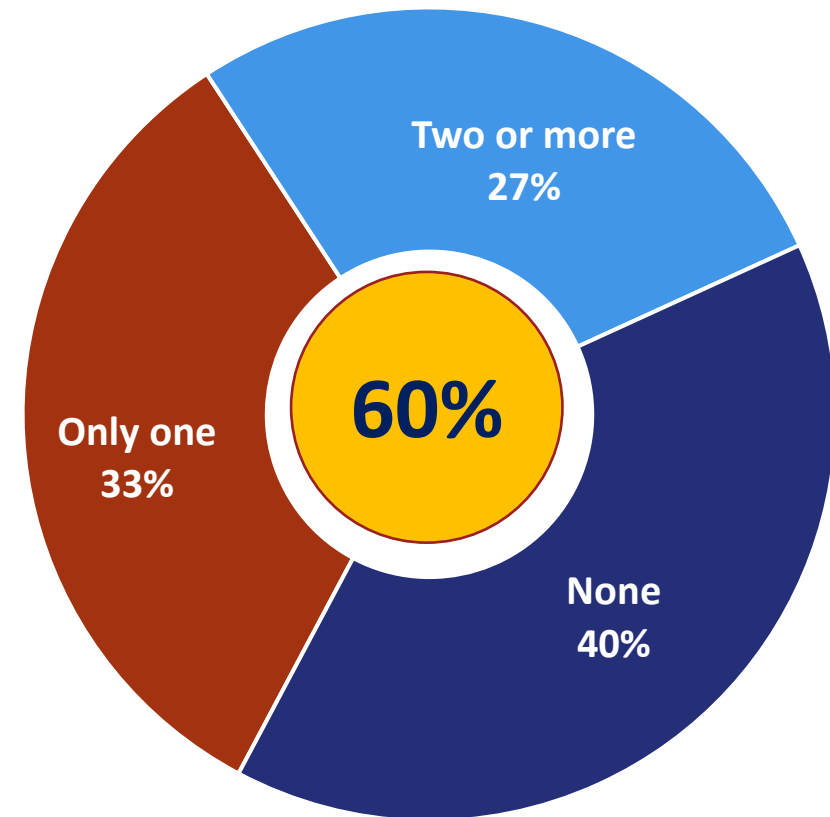
SUBSCRIBE

More Subscribe to Video Streaming Services Than Audio Streaming Services – By Far

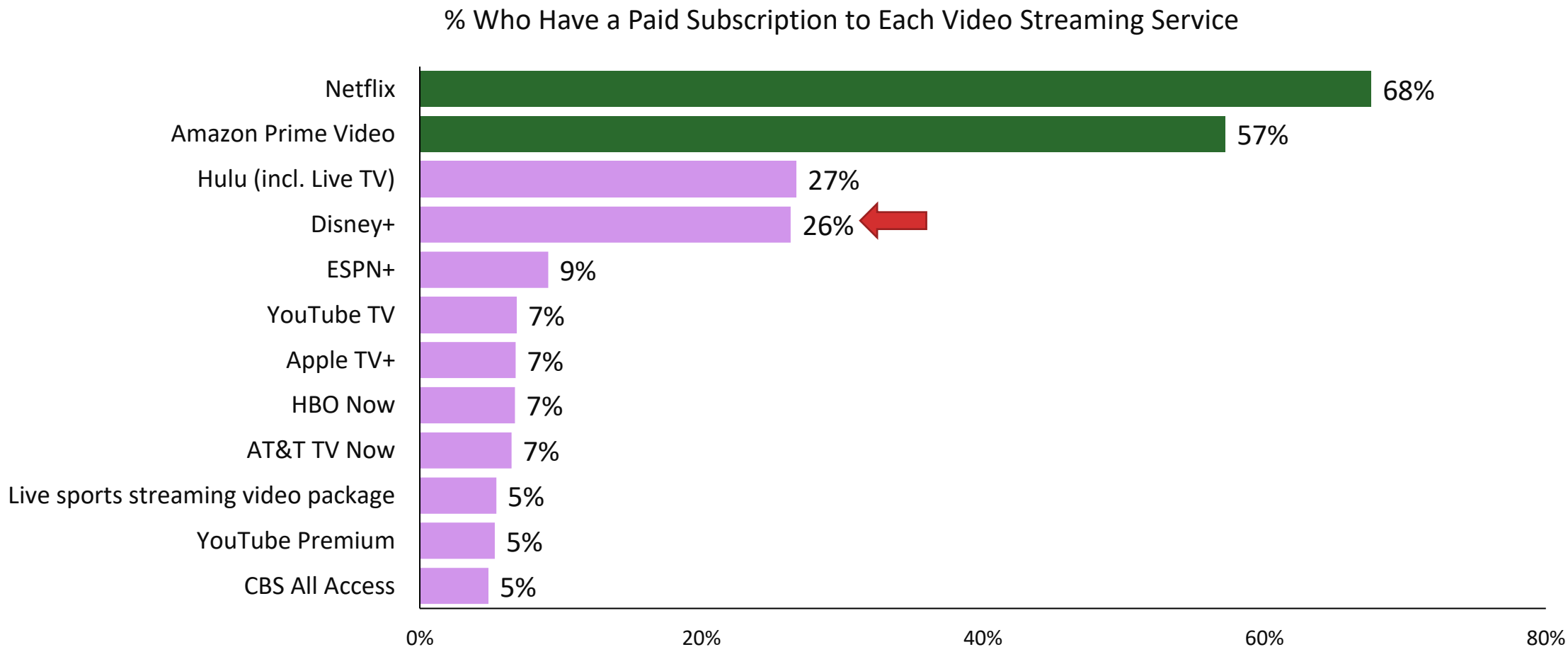
Paid **VIDEO** Streaming Subscriptions



Paid **AUDIO** Streaming Subscriptions

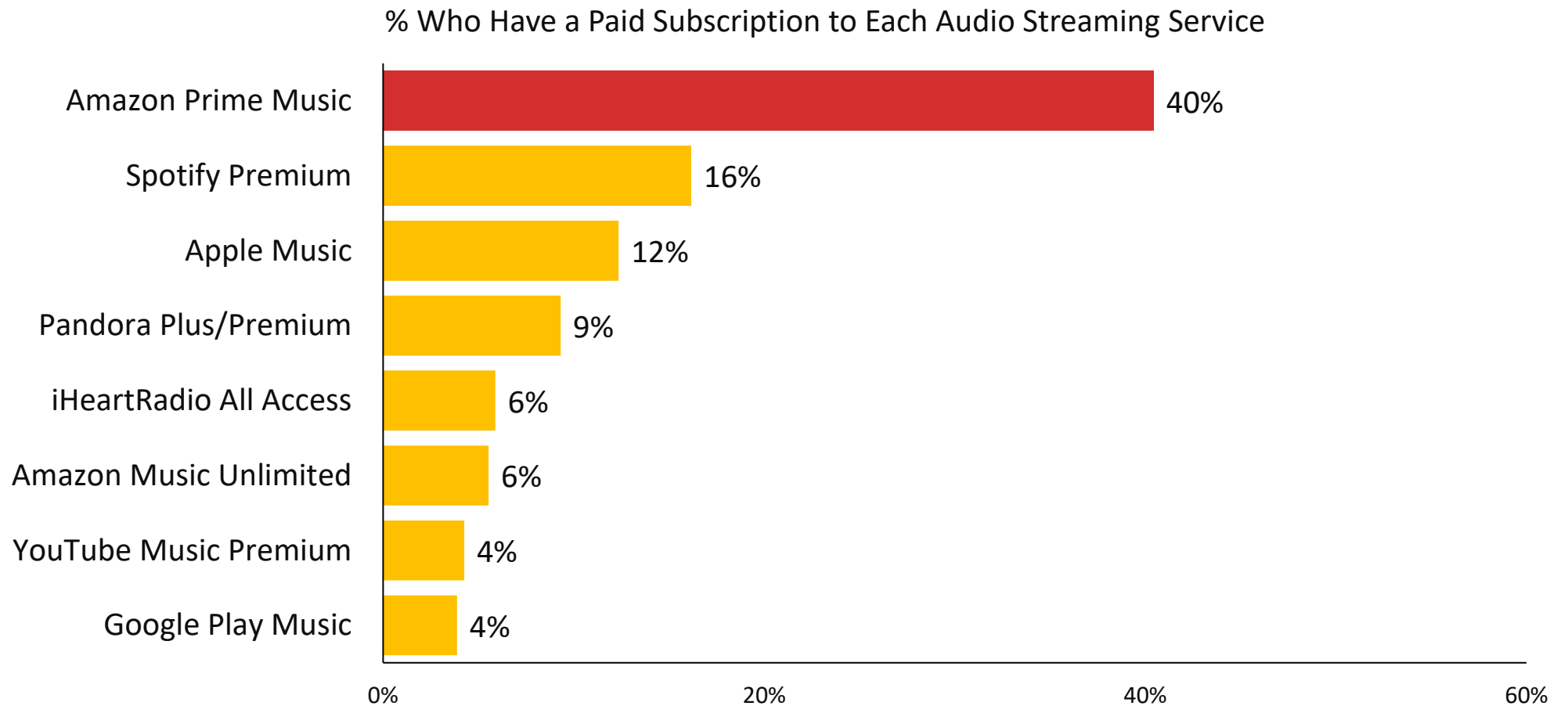


Netflix and Amazon Prime Video Dominate Paid Online Video Subscriptions; Disney+ Quickly Reaches One in Four Households



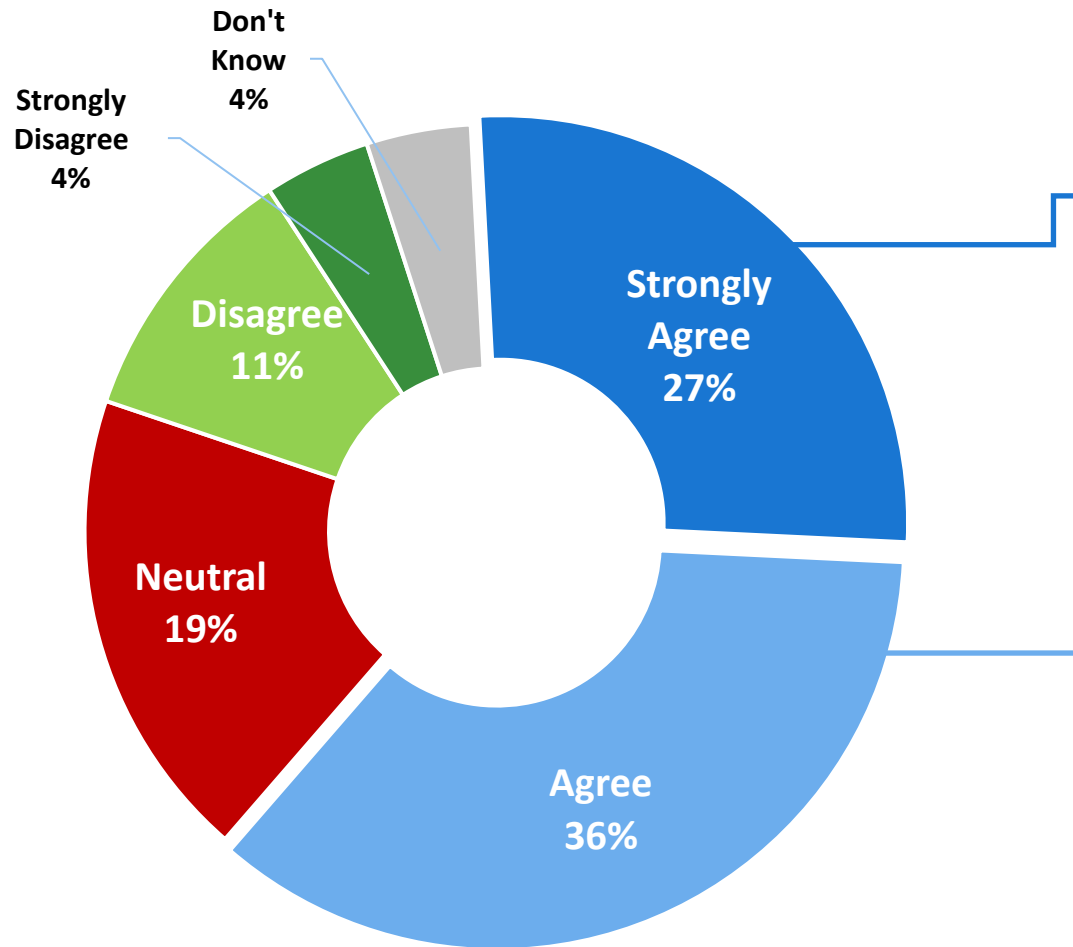
(Multiple responses accepted; services 5% and higher shown)

Amazon Prime Music (Via Amazon Prime) Leads Paid Audio Streaming Subscriptions By a Large Margin

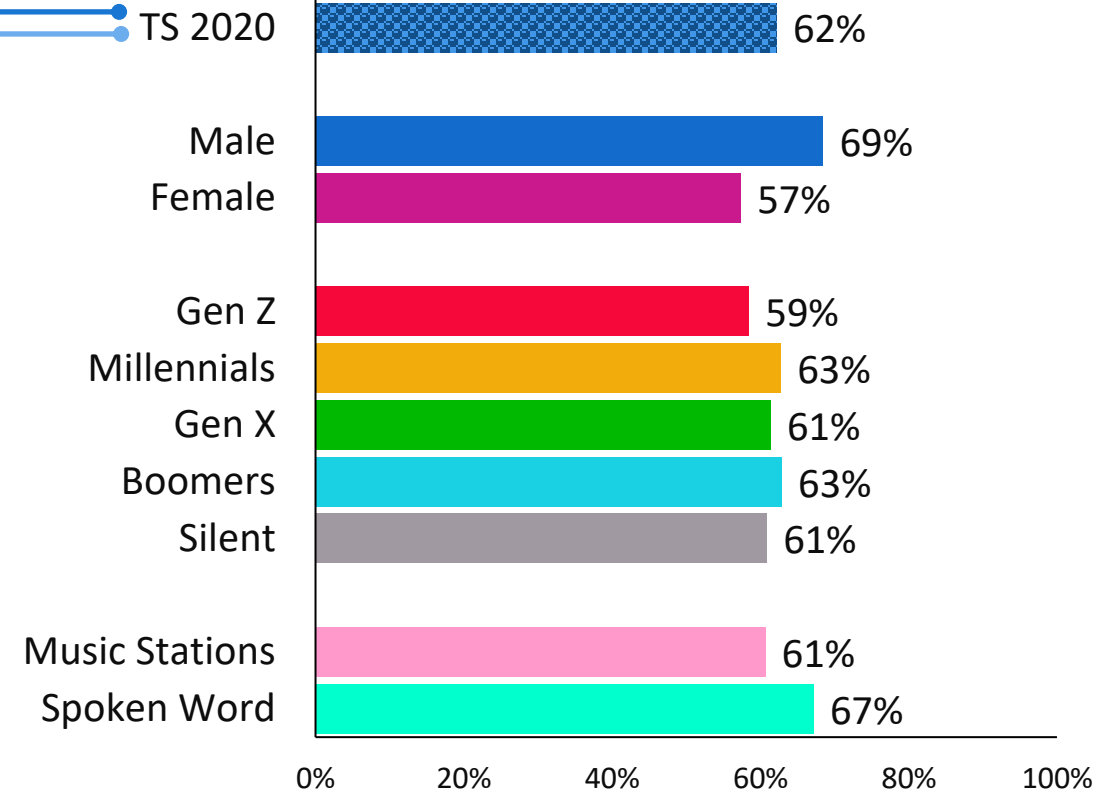


(Multiple responses accepted; services 4% and higher shown)

Six in Ten Say Subscription Fees for Audio/Video Services Are a Concern



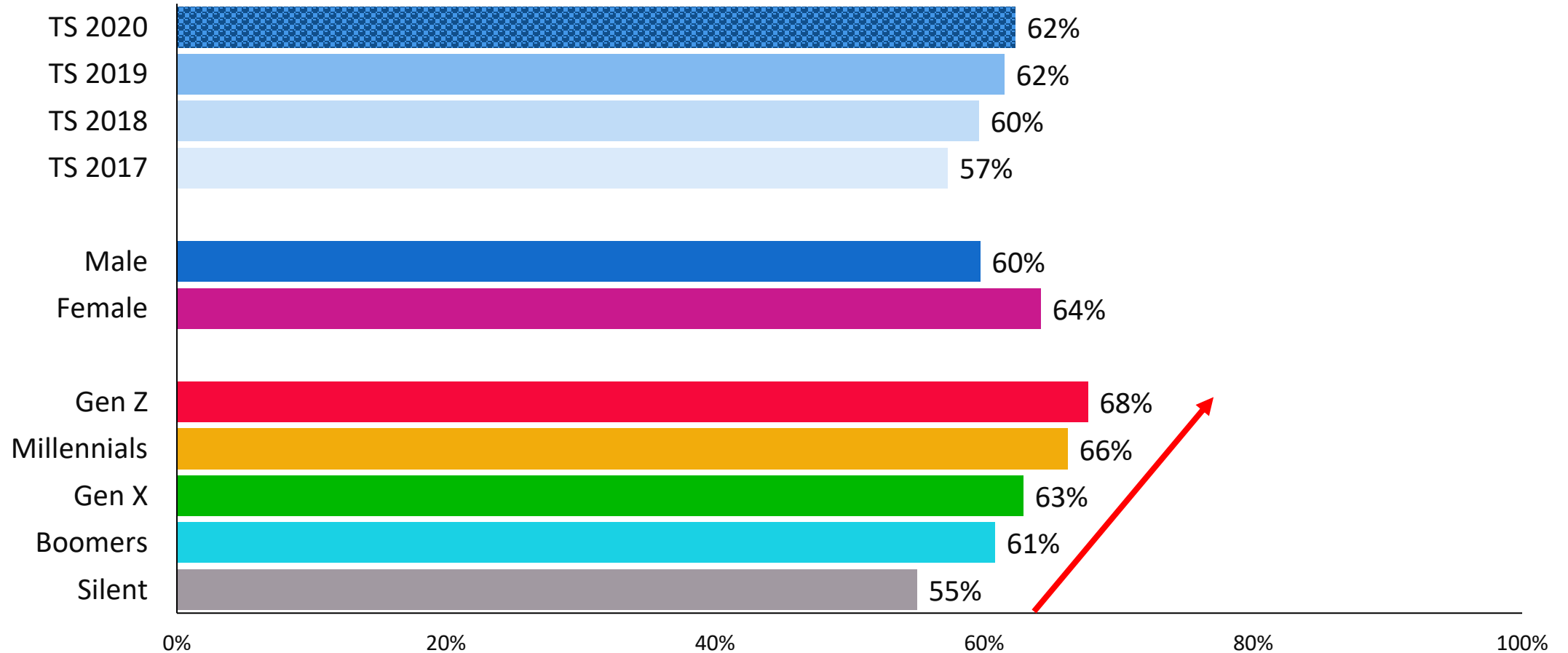
% Agreement (Strongly Agree + Agree)



"I am concerned about the growing number of subscription fees I'm paying for media content"

A Key Reason For Listening to AM/FM Radio: It's Free – Especially Among Progressively Younger Respondents

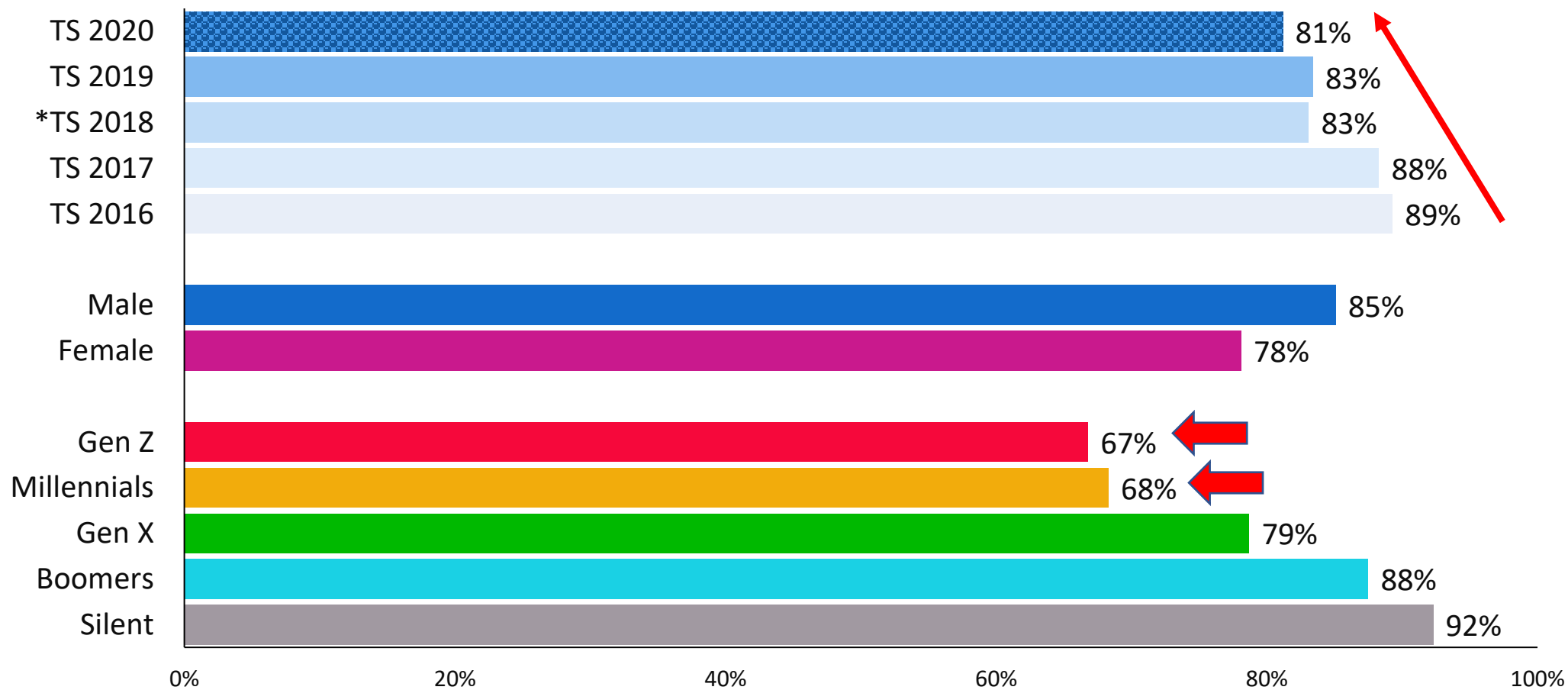
"It's Free"





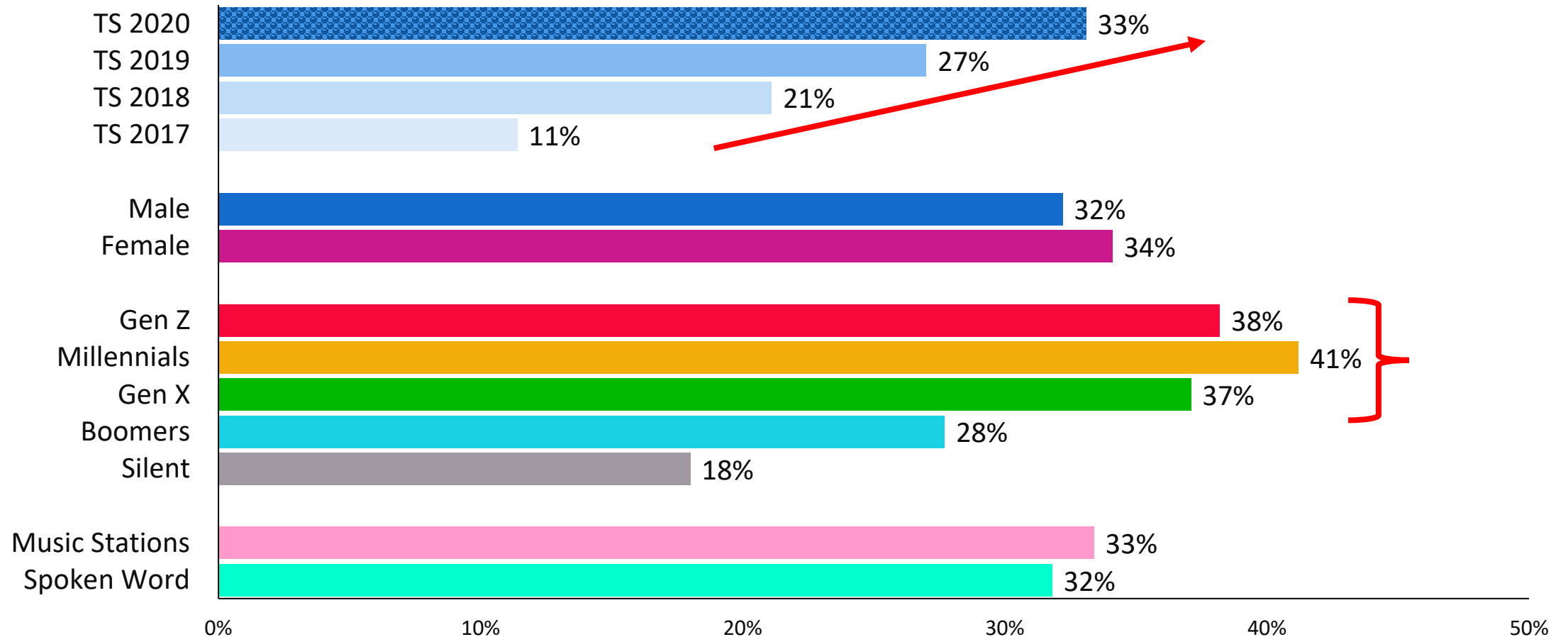
Smart Speakers & Voice

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



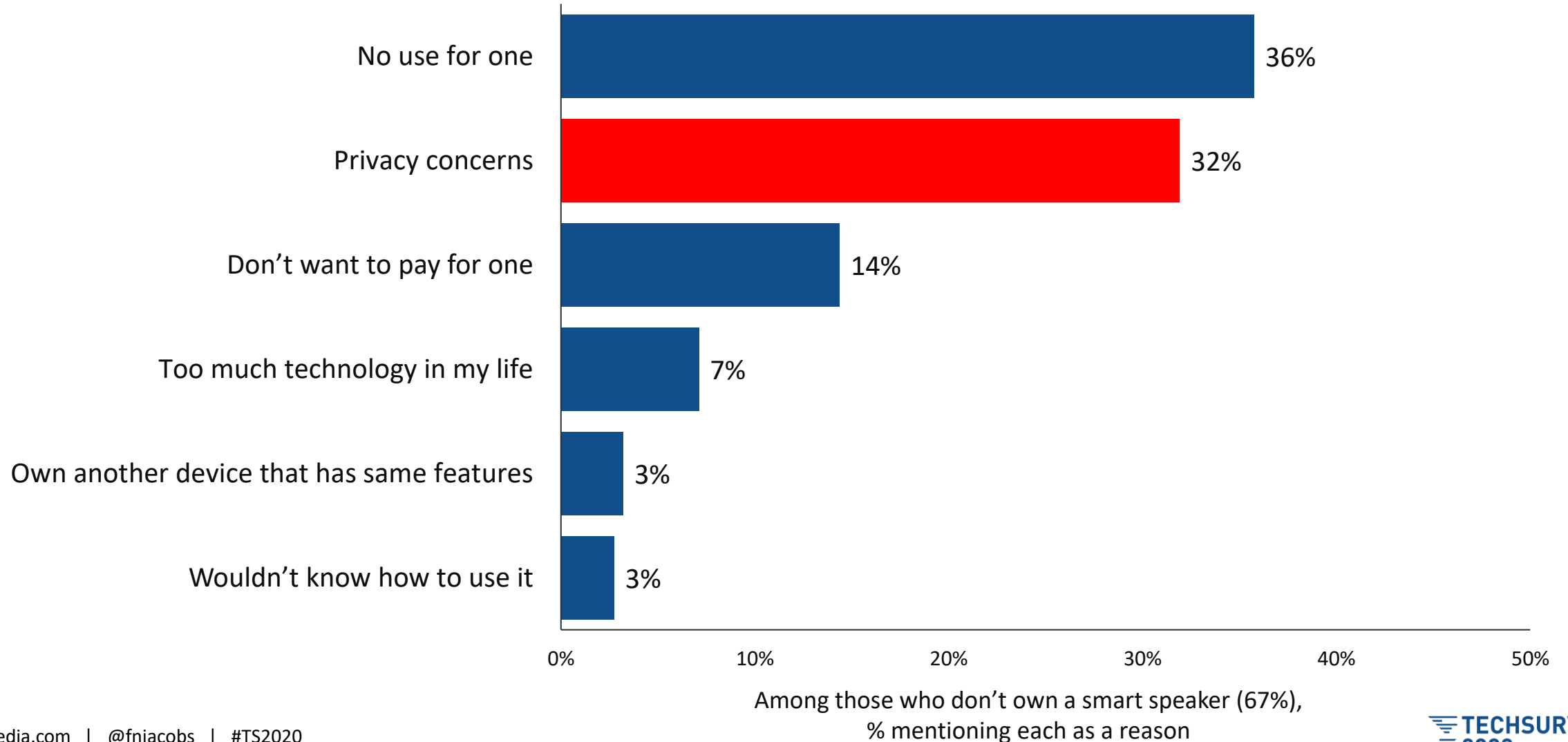
% with a regular radio in working condition where they live that they use*
*updated wording: "...that you use?"

Smart Speaker Ownership Continues its Sharp Growth Spurt



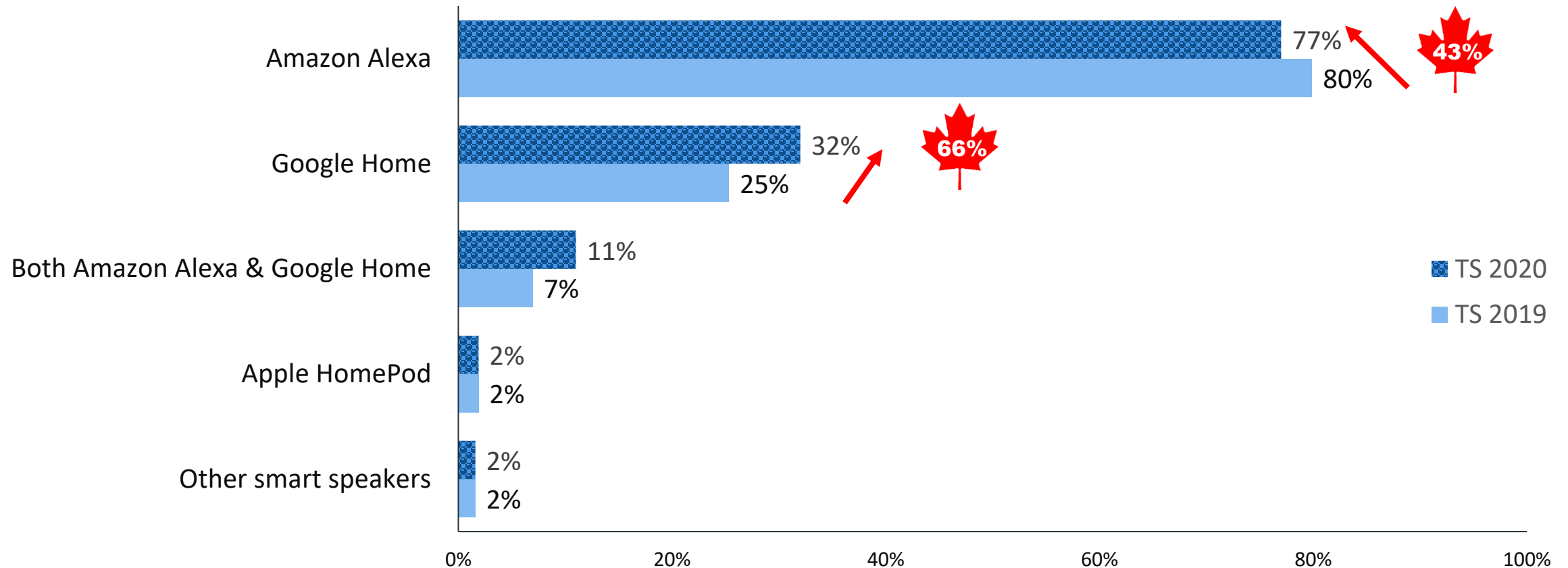
% who own a smart speaker (Amazon Alexa, Google Home, etc.)

Top Reasons Why Respondents Do Not Own a Smart Speaker



Amazon Alexa's Gap Over Google Home in the U.S. Is Narrowing; In Canada, it's the Other Way Around

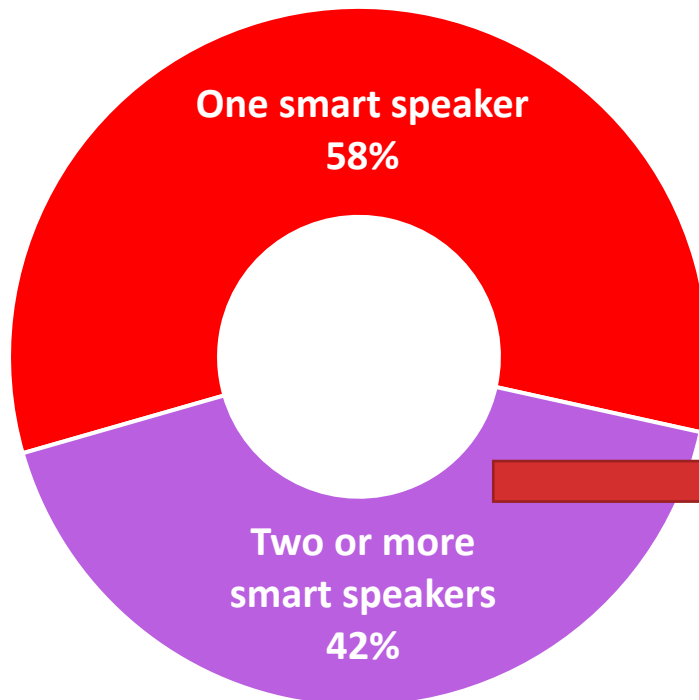
Among Smart Speaker Owners, % Who Own...



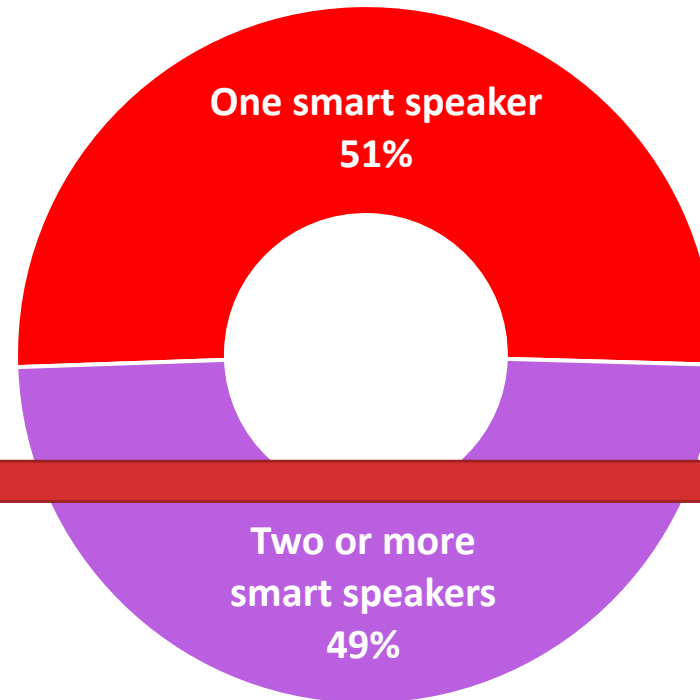
Smart Speaker Owners Who Have More Than One of These Voice-Controlled Devices Continues to Rise

% of Smart Speaker Owners Who Own...

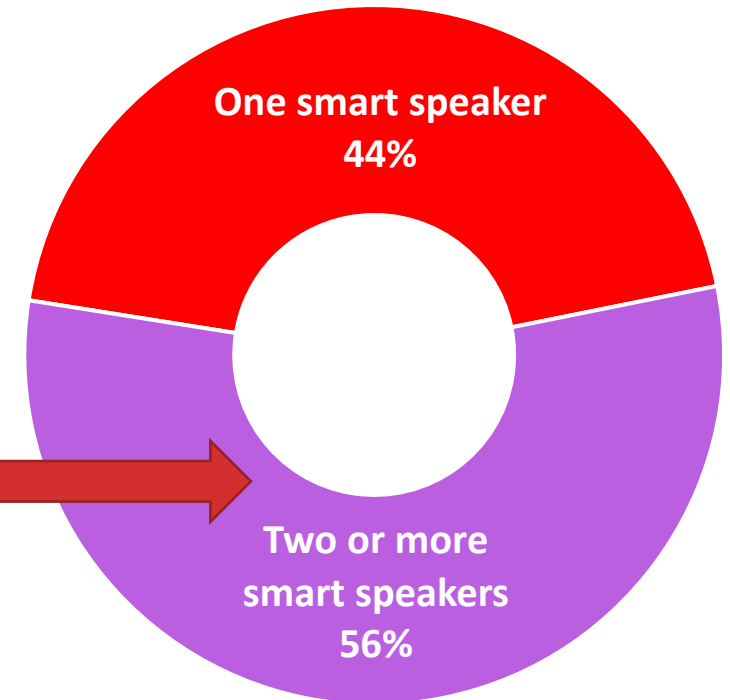
TS 2018



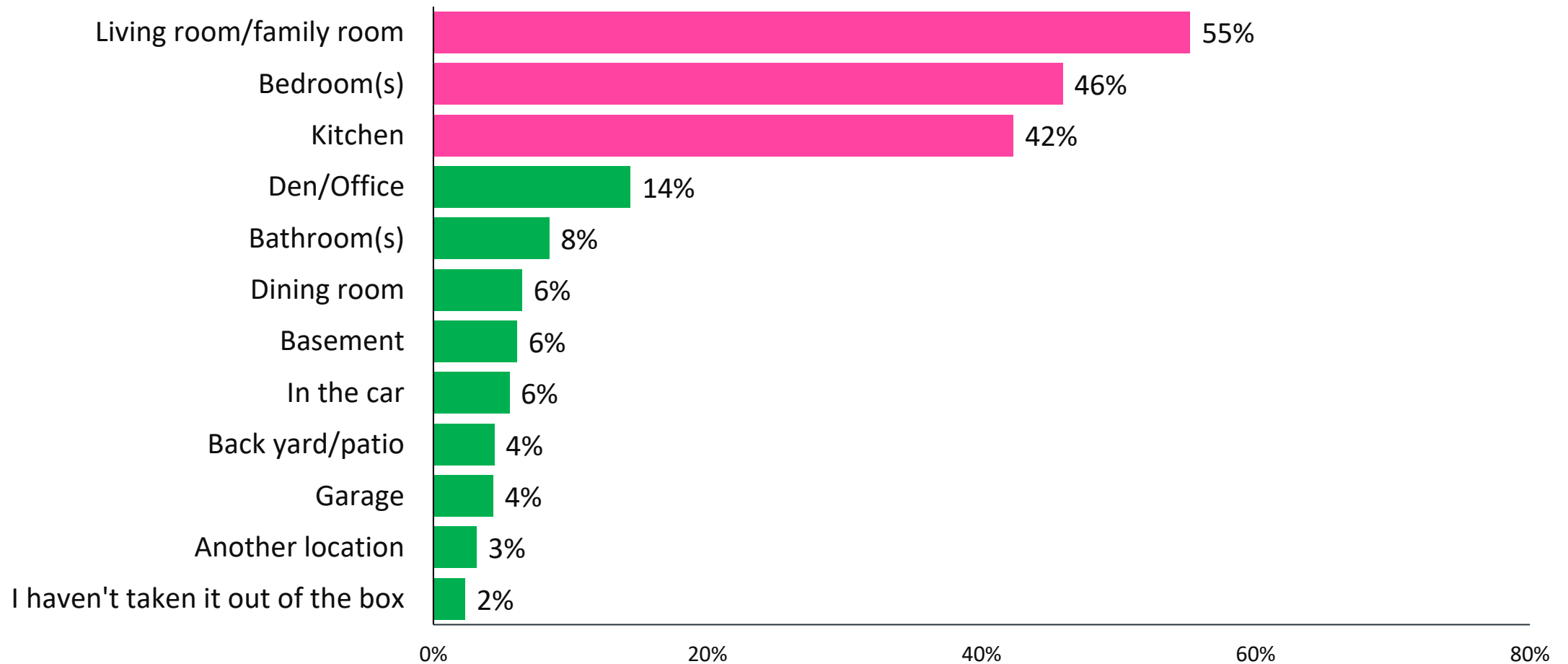
TS 2019



TS 2020

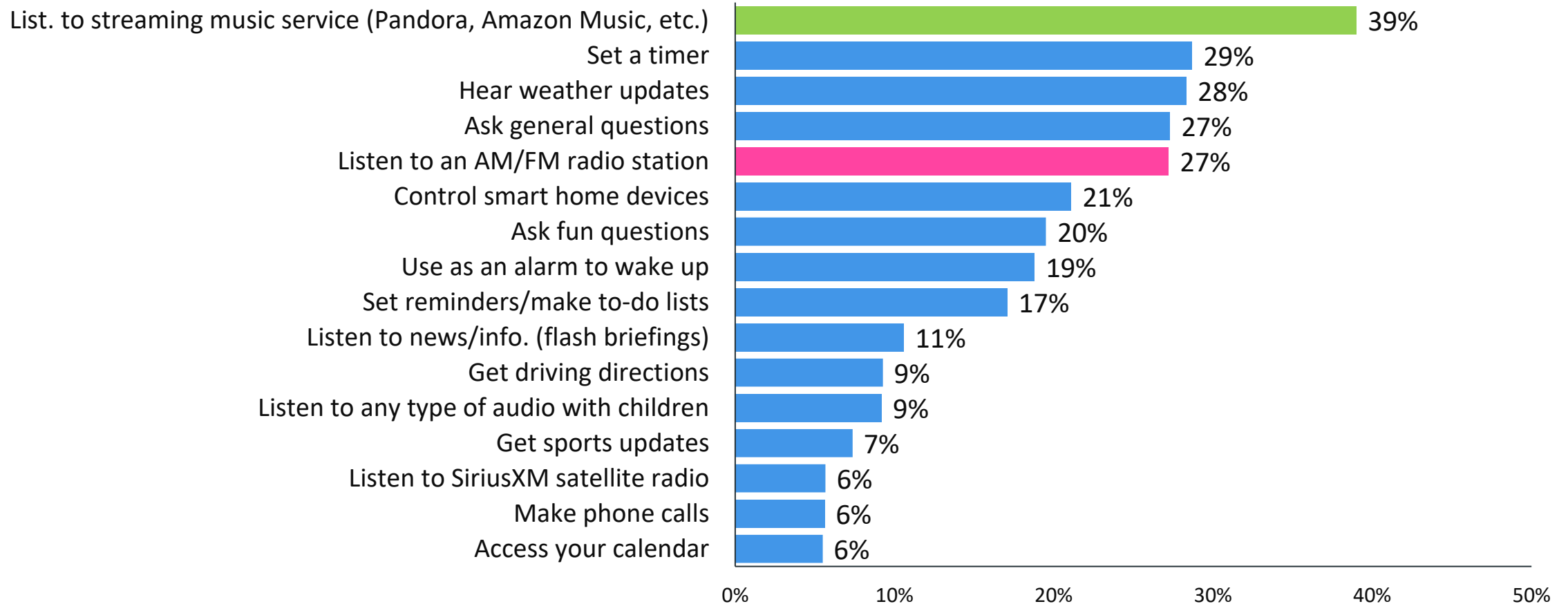


A Majority of Smart Speaker Owners Place Them in Living & Family Rooms; Bedrooms & Kitchens are Close Behind



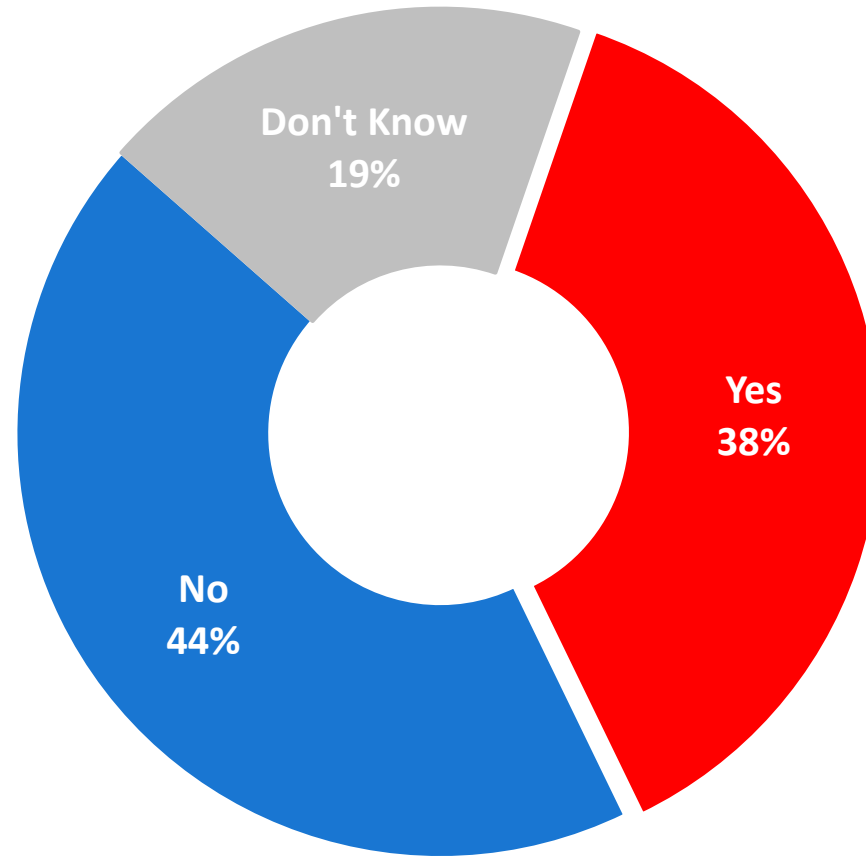
Among smart speaker owners, % who have a smart speaker
in each location (multiple responses accepted)

Listening to Streamed Music Tops the List of Frequent Uses For Smart Speakers; AM/FM Radio Listening Virtually Tied for Second

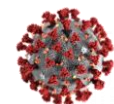


% of smart speaker owners who “frequently” use their device(s)
in each way (most mentioned uses; responses 6% and higher shown)

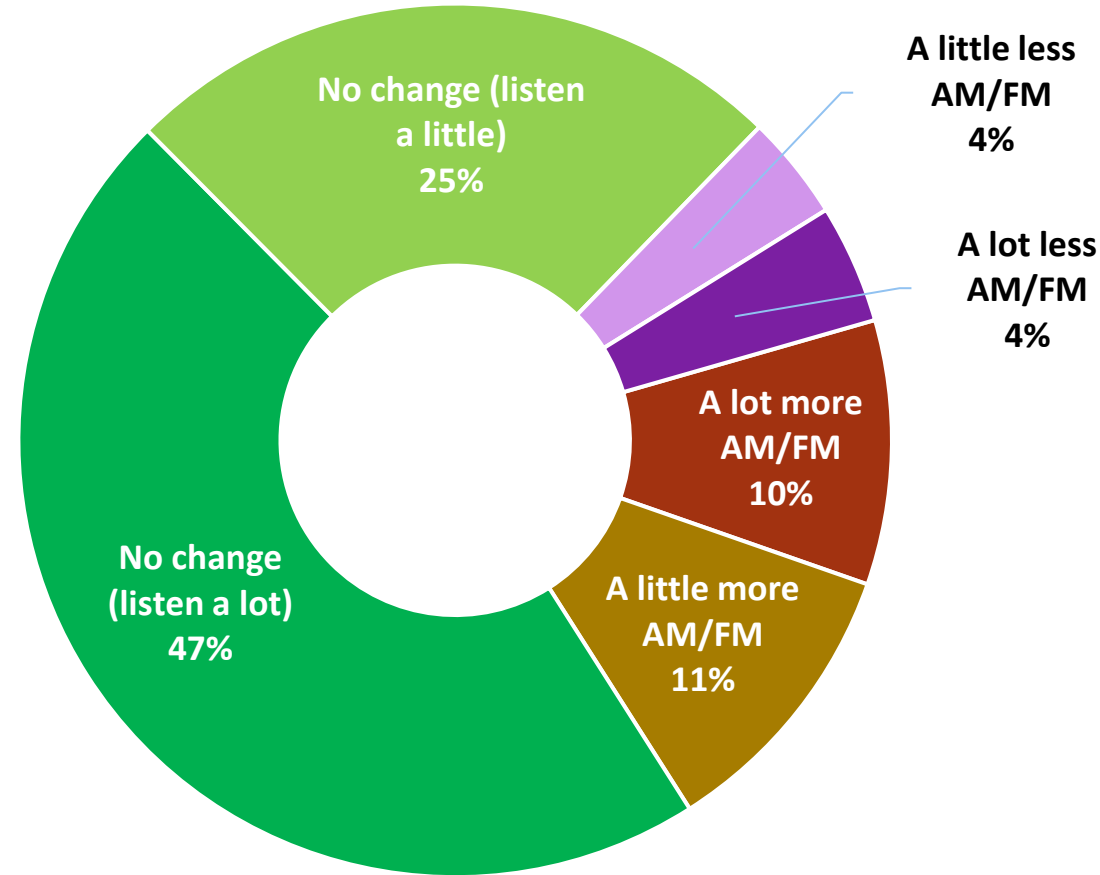
Fewer Than Four in Ten Smart Speaker Owners Have Heard Radio Stations Promoting the Devices



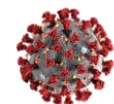
"Have you heard any AM/FM radio stations talking about or promoting smart speakers on the radio recently?"



One in Five Smart Speaker Owners Report Spending More Time Listening to AM/FM Radio Since Getting the Device



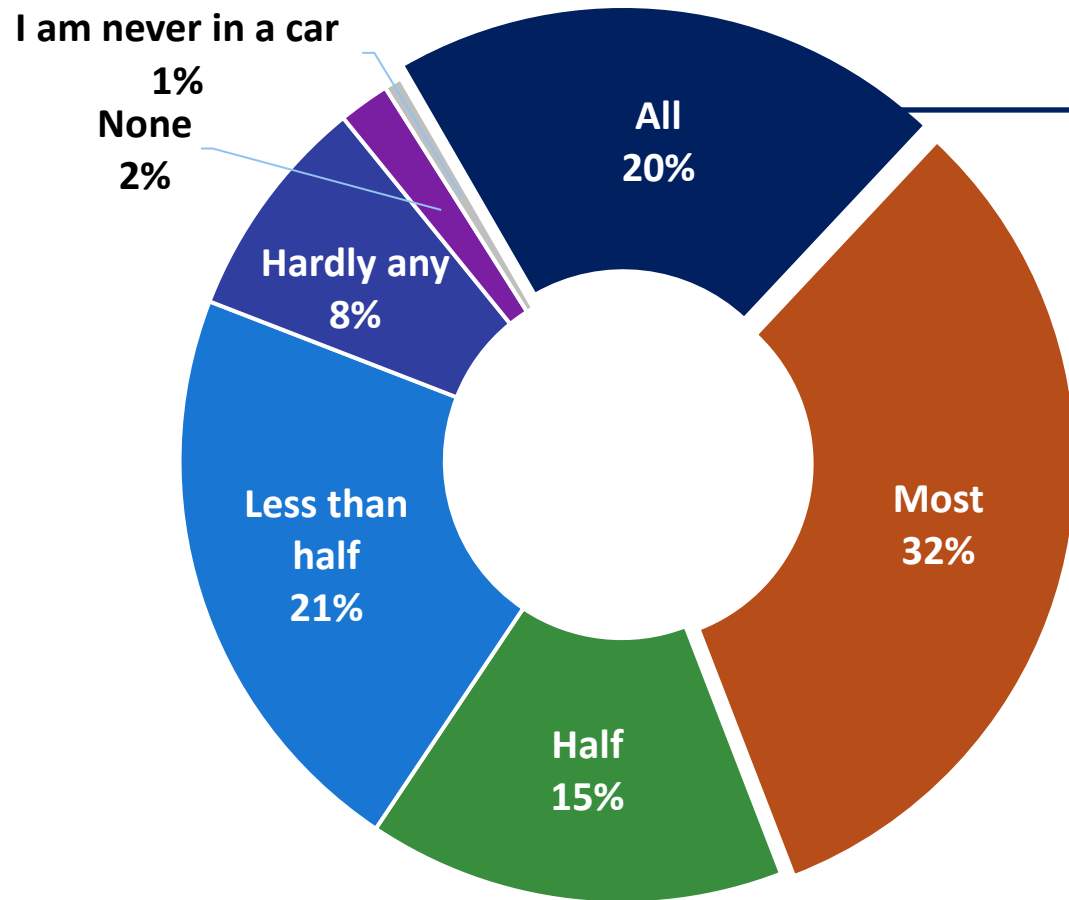
"How has your listening to AM/FM radio stations changed overall since you got a smart speaker?"



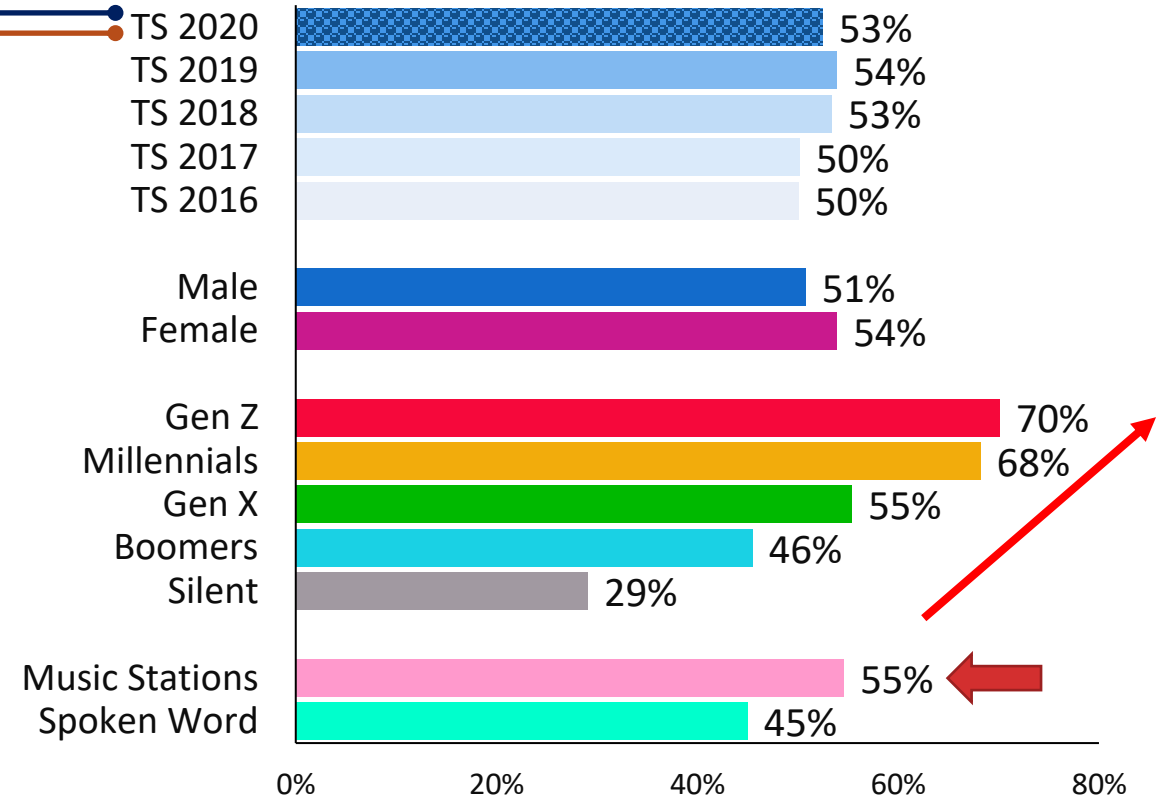


In-Car Audio

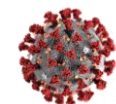
More Than Half Say All or Most of Their AM/FM Radio Listening Is In-Car; Highest Among Gen Z & Millennials



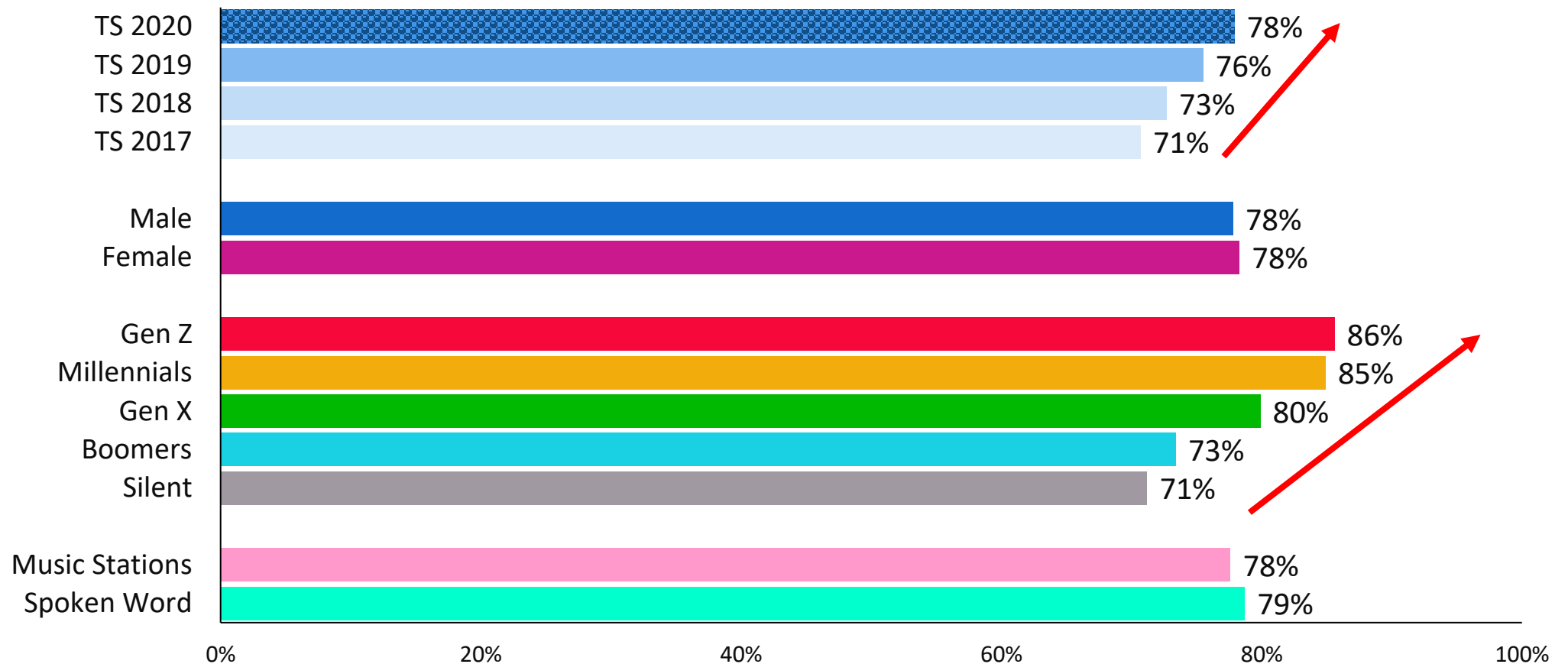
% Saying "All" or "Most" AM/FM Radio Listening Is In-Car



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

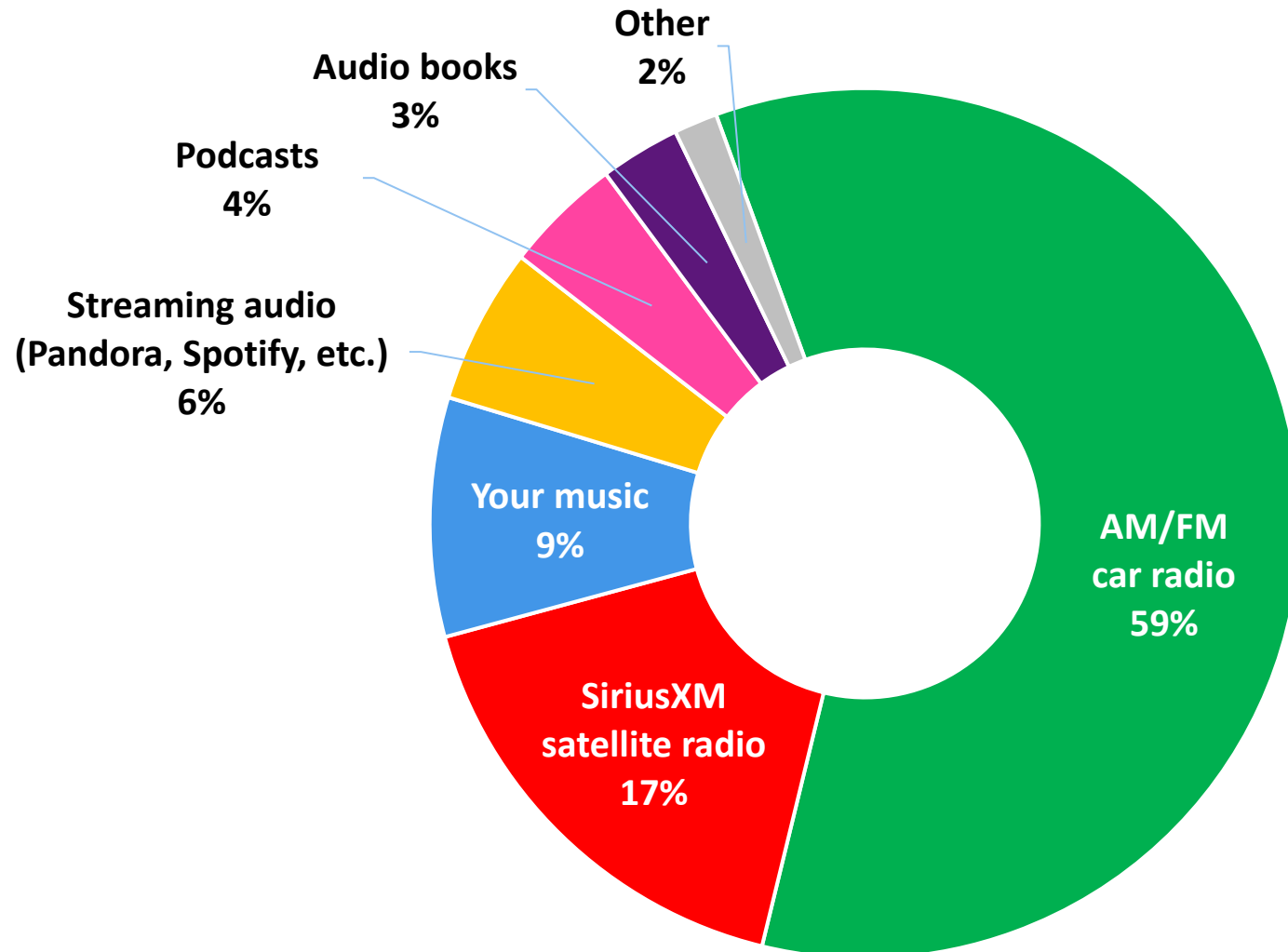


An All-Time High Can Connect Their Smartphones To Their Cars, Especially Progressively Younger Consumers



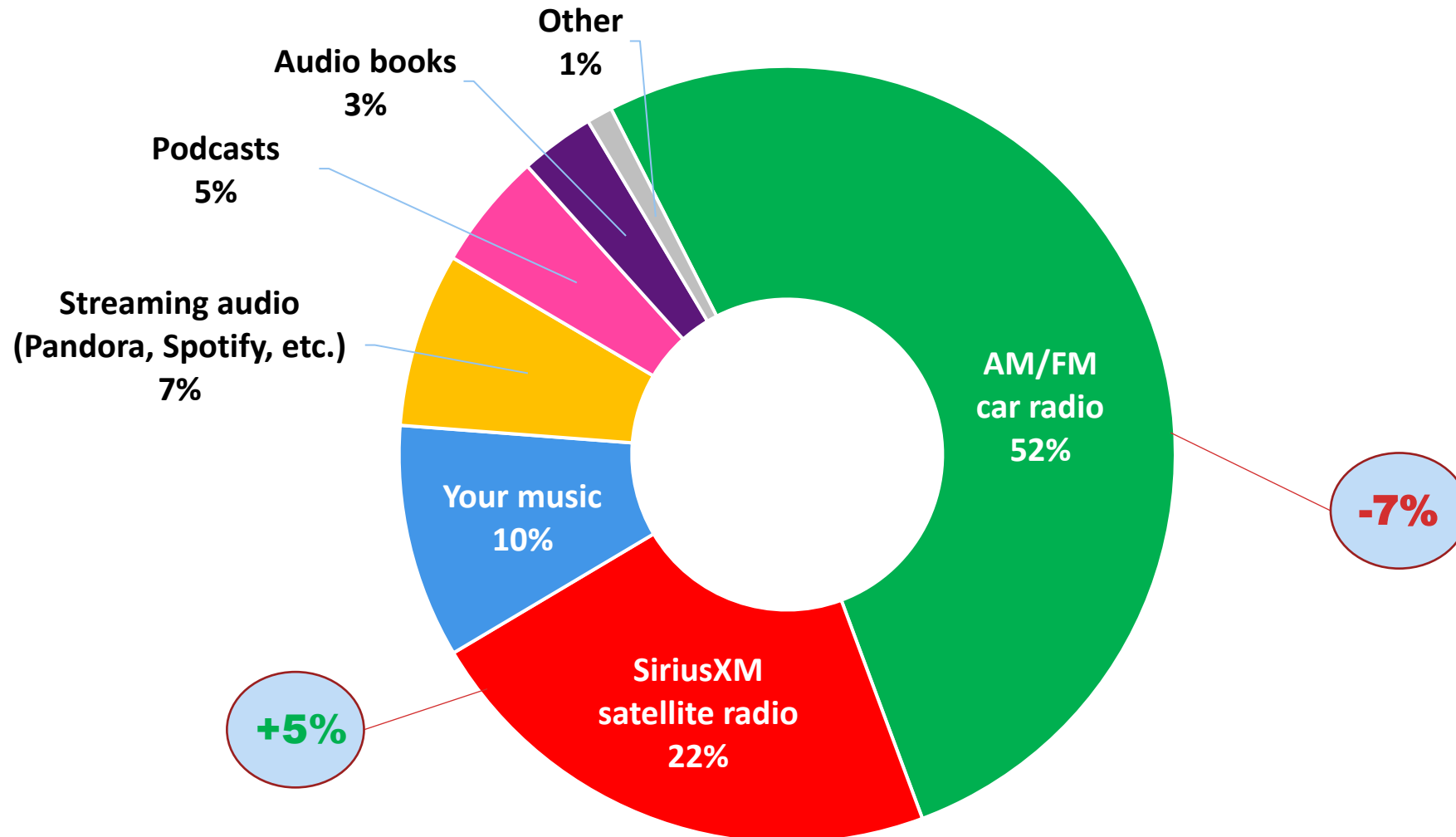
Among smartphone owners who spend time in a car,
% who have a way to connect their smartphone to their car

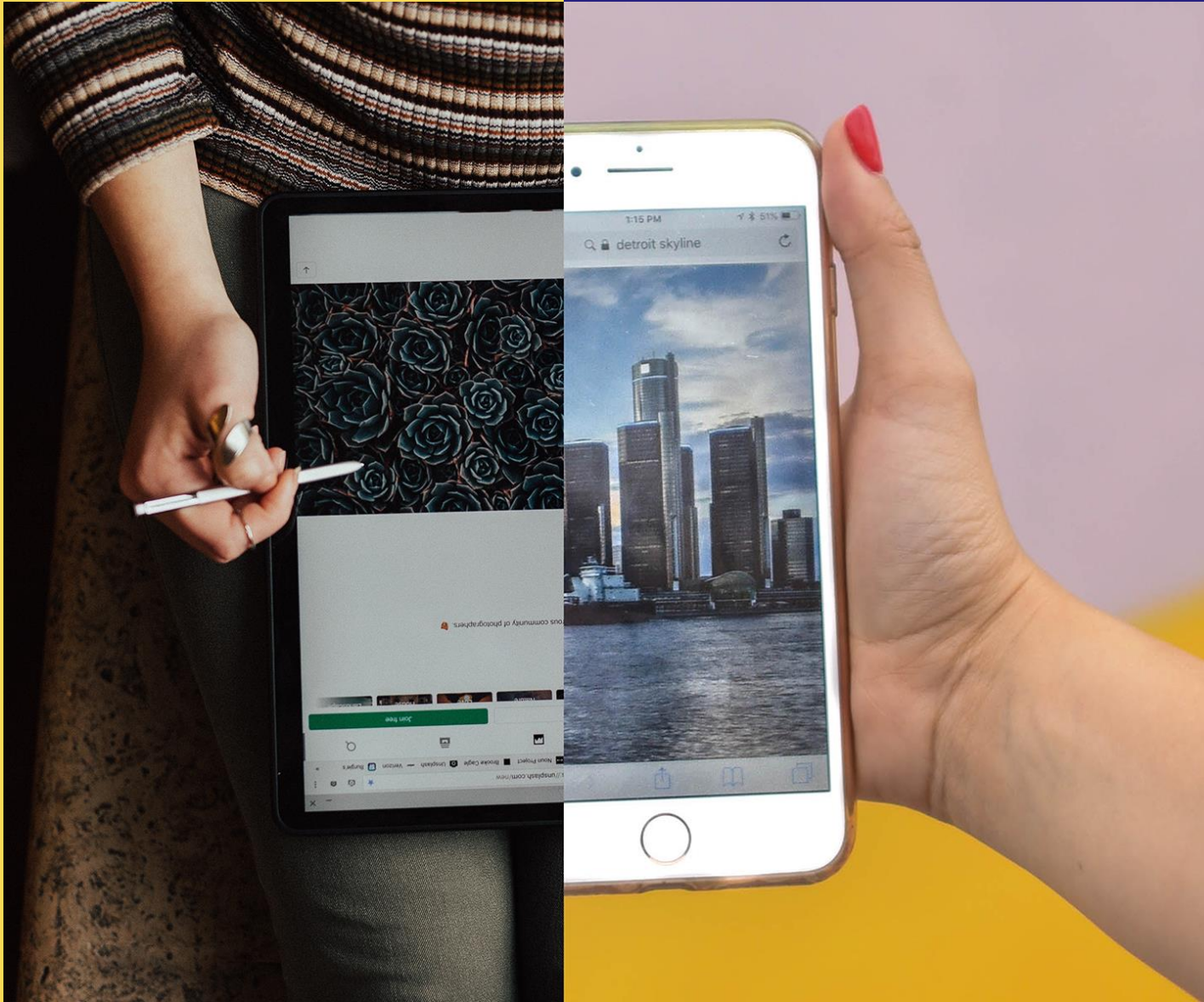
In-Car Audio Usage *Total*



In-Car Audio Usage

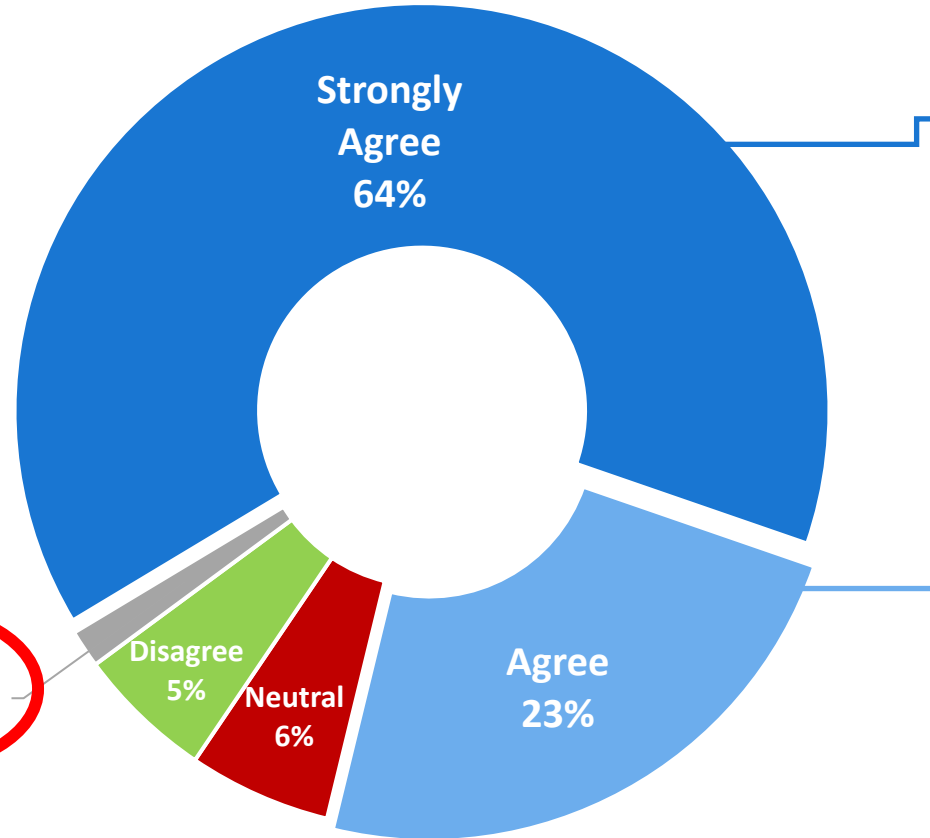
Own In-Car Media System



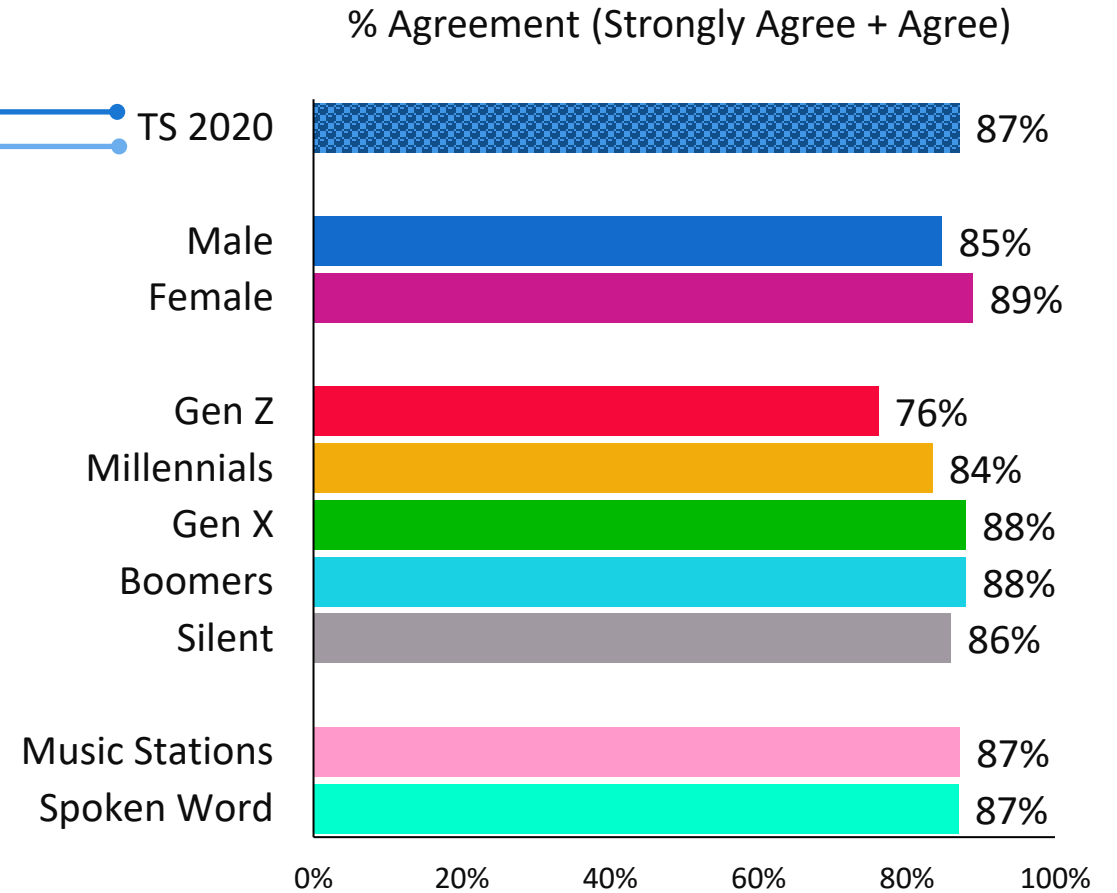


Mobile Phones & Apps

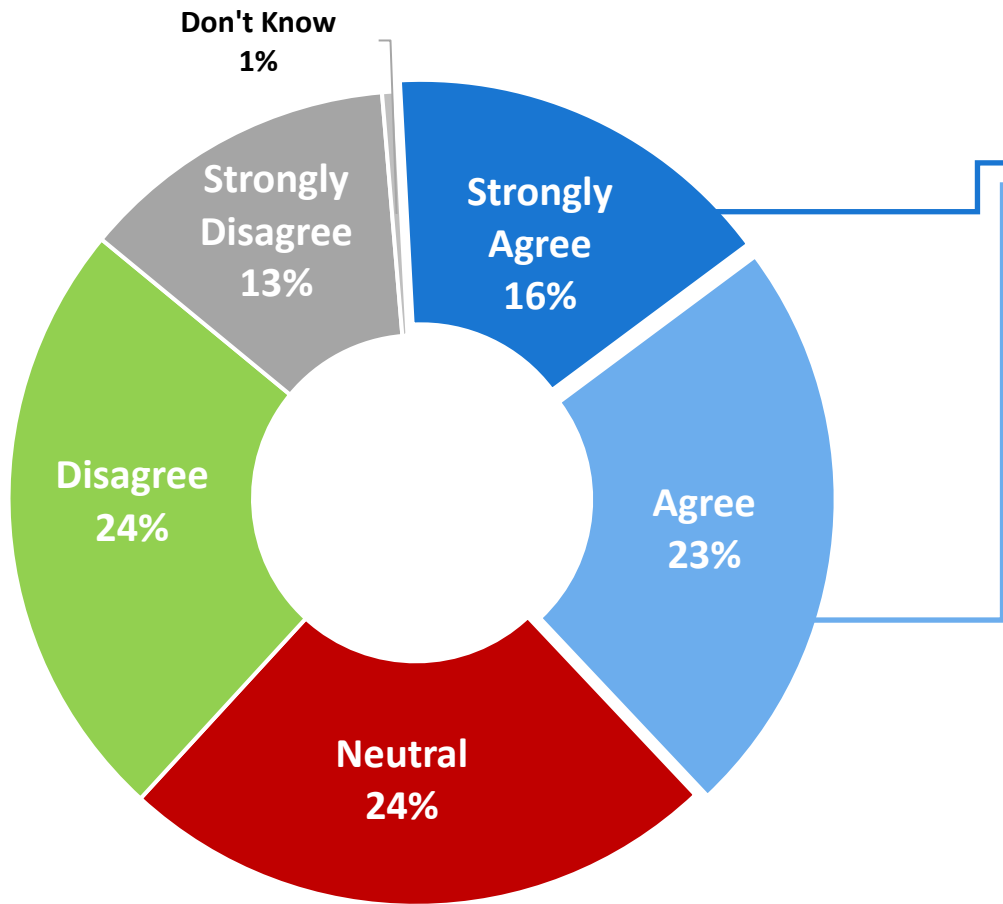
Demographics Aside, Very Few Answer Their Phones From Numbers They Don't Recognize



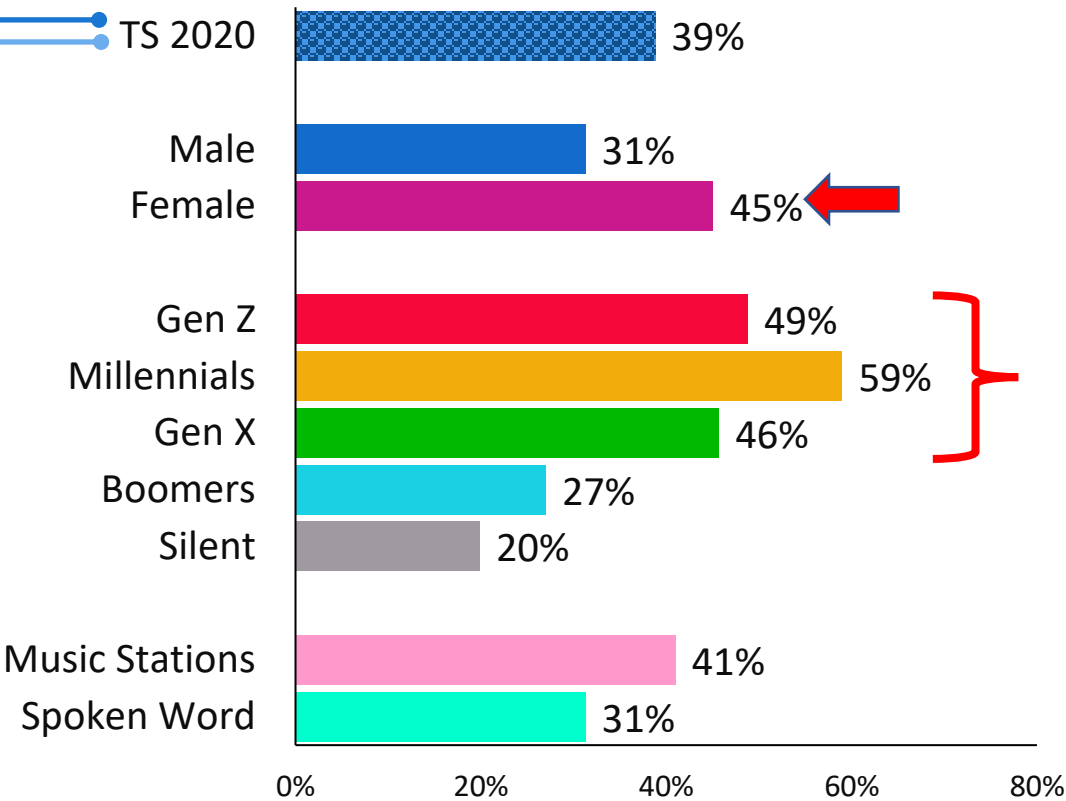
*"I rarely/never answer my phone
if it's from a number I don't recognize"*



Respondents Are Split Over Texting vs. Talking on the Phone, But Women & Young People Prefer Text Communication

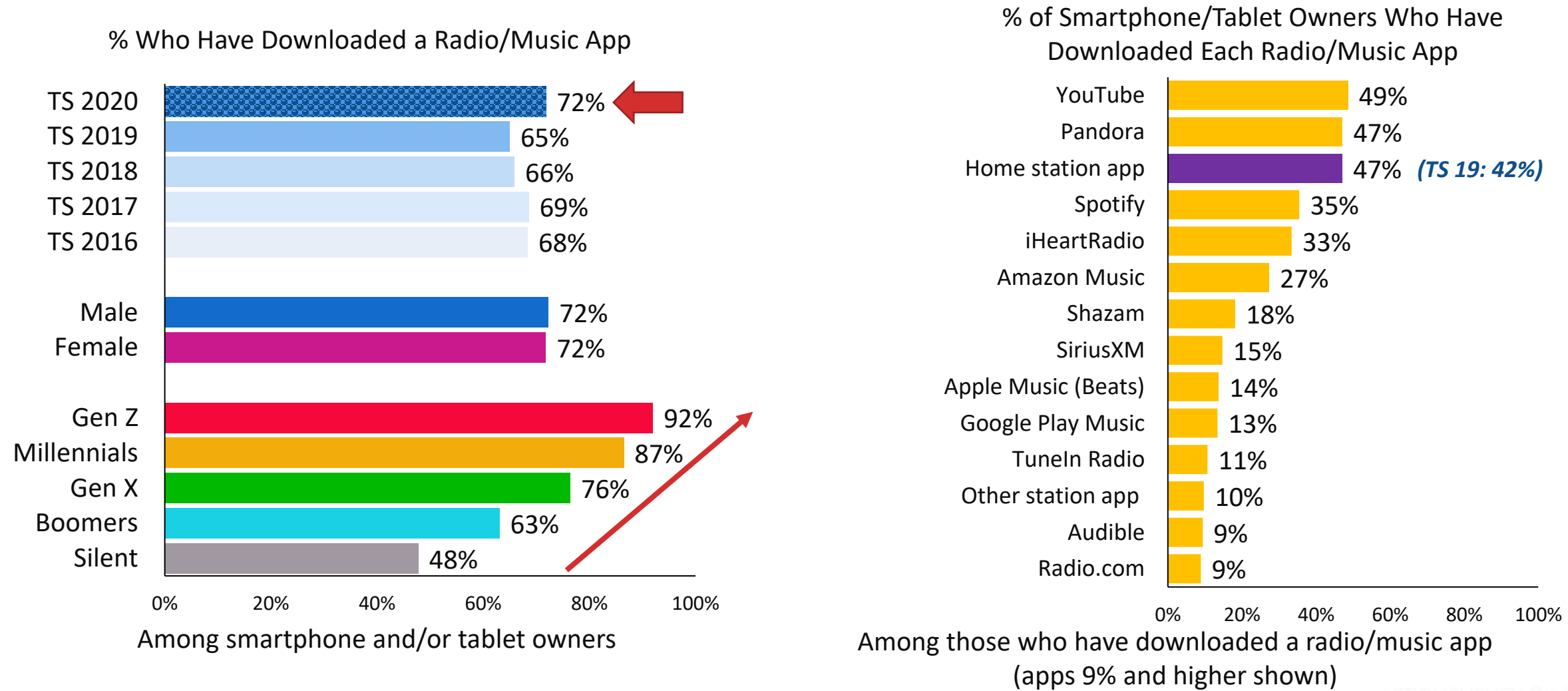


% Agreement (Strongly Agree + Agree) Who Prefer to Text (vs. Speak on the Phone)



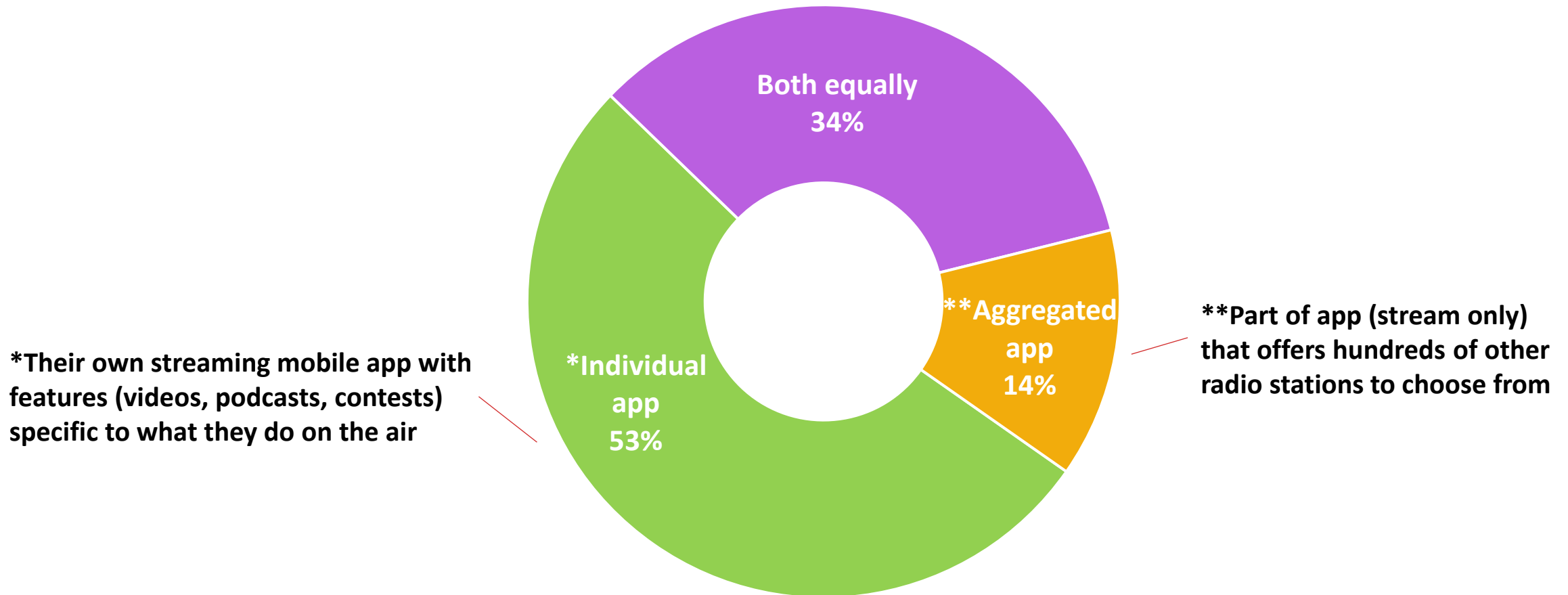
"I generally prefer to communicate via text rather than speaking with people over the phone or in person"

More Than Seven in Ten Have Downloaded Radio/Music Apps, With Home Station App Downloads on the Rise

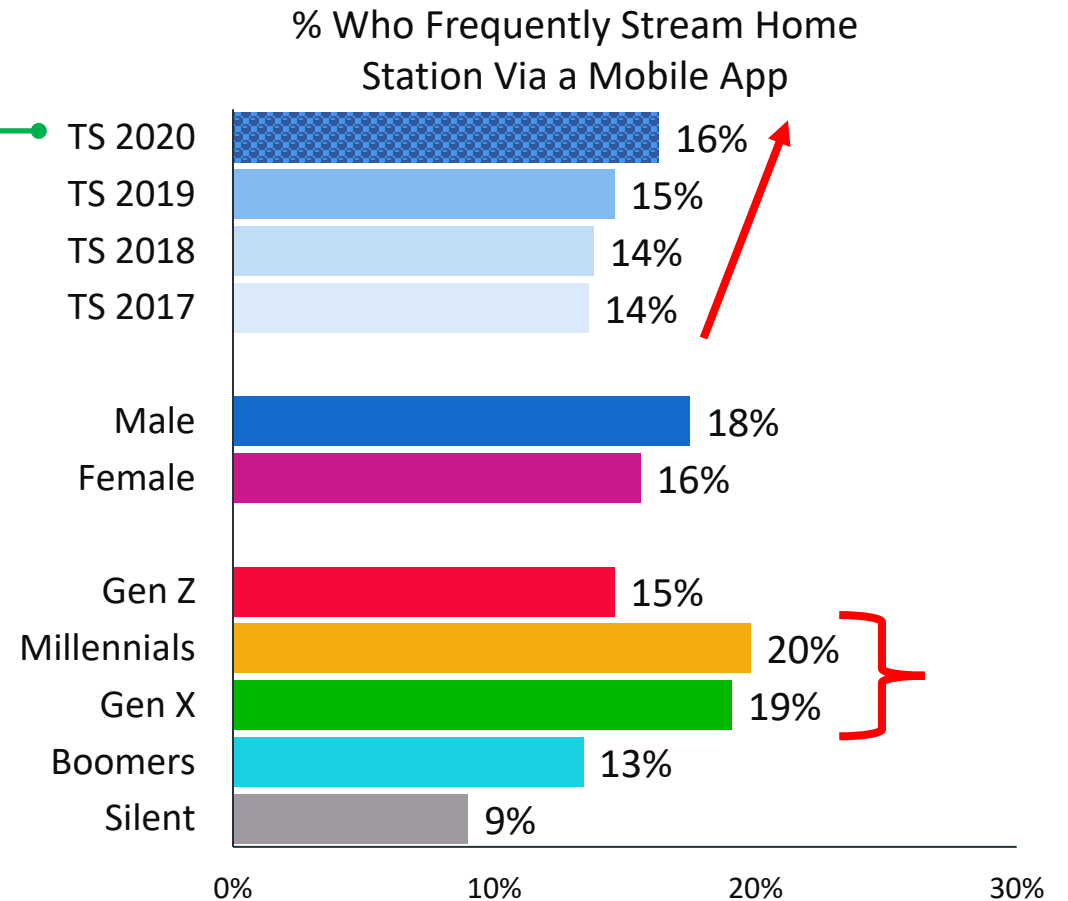
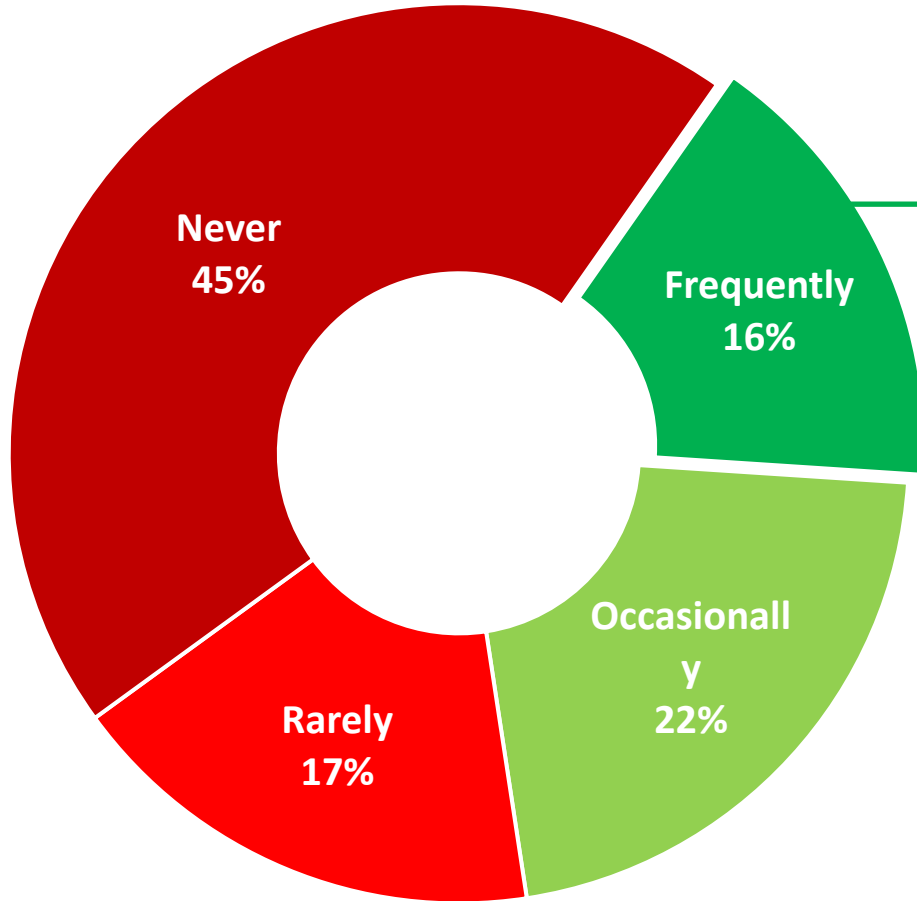


There Is Significantly More Interest in a Standalone Station App Than for an Aggregated App

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

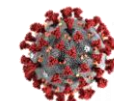
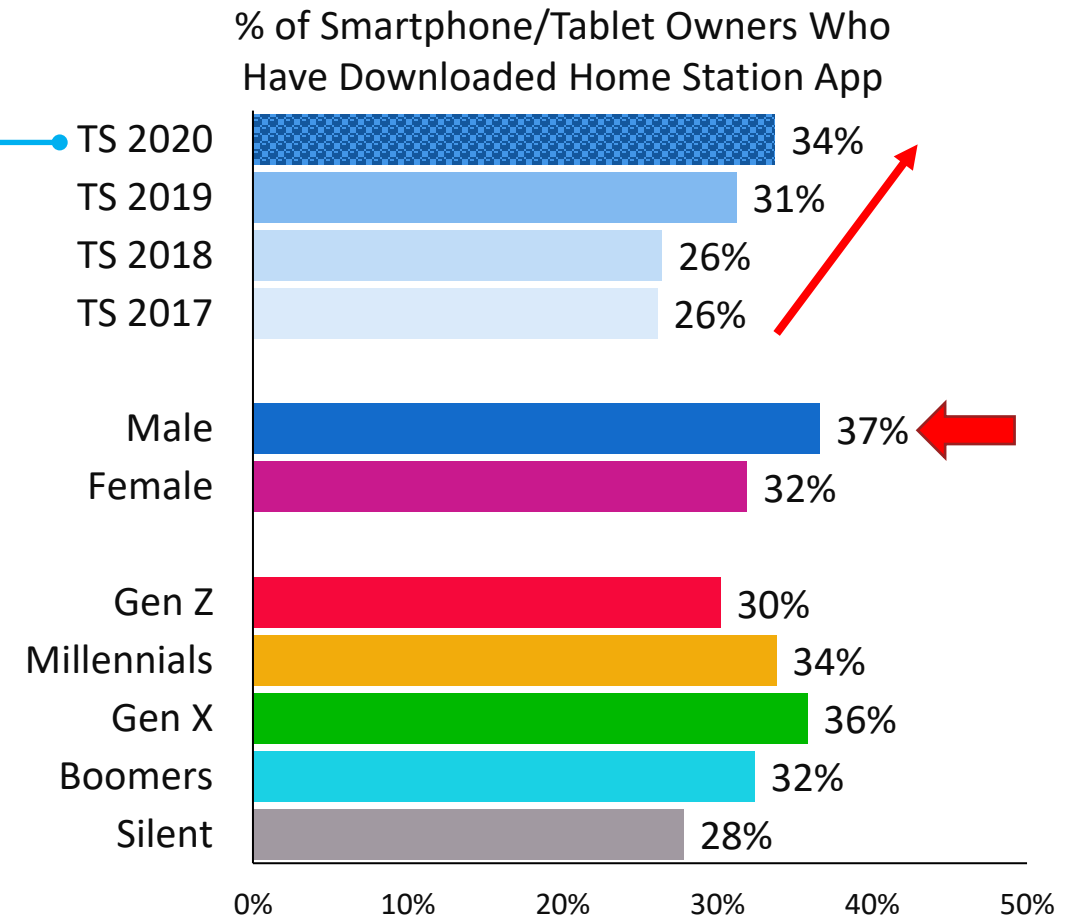
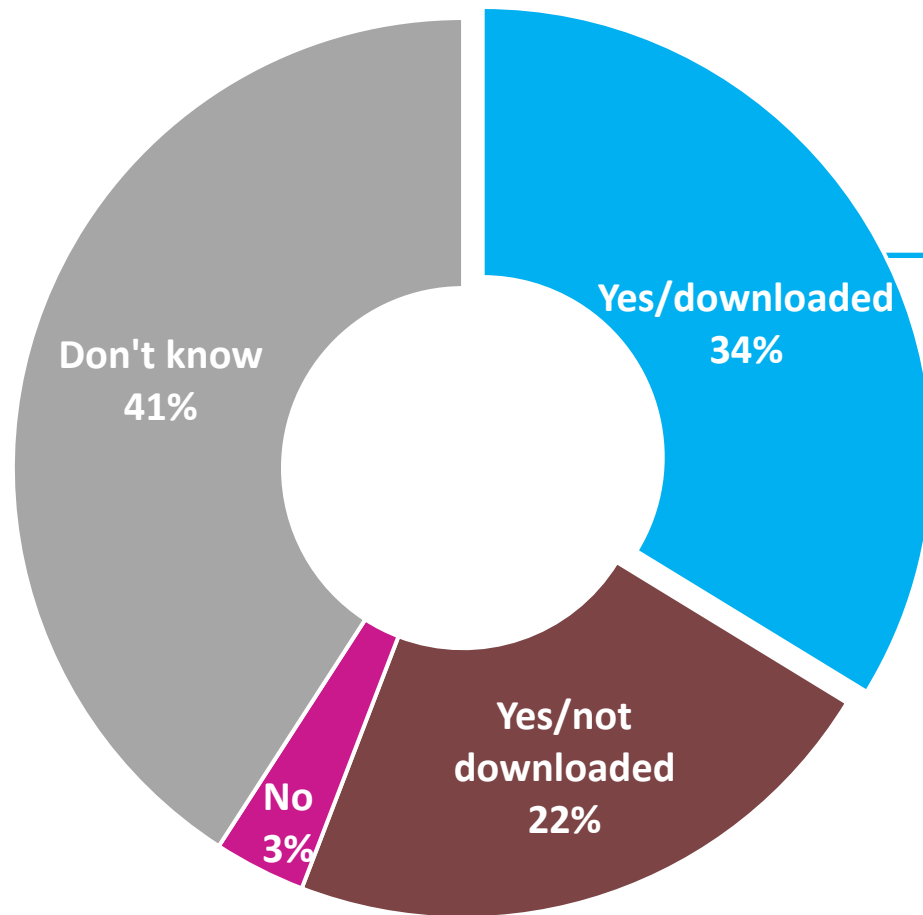


About One in Six Frequently Listens to Their Favorite Station Via a Mobile App, Especially Millennials & Xers

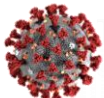
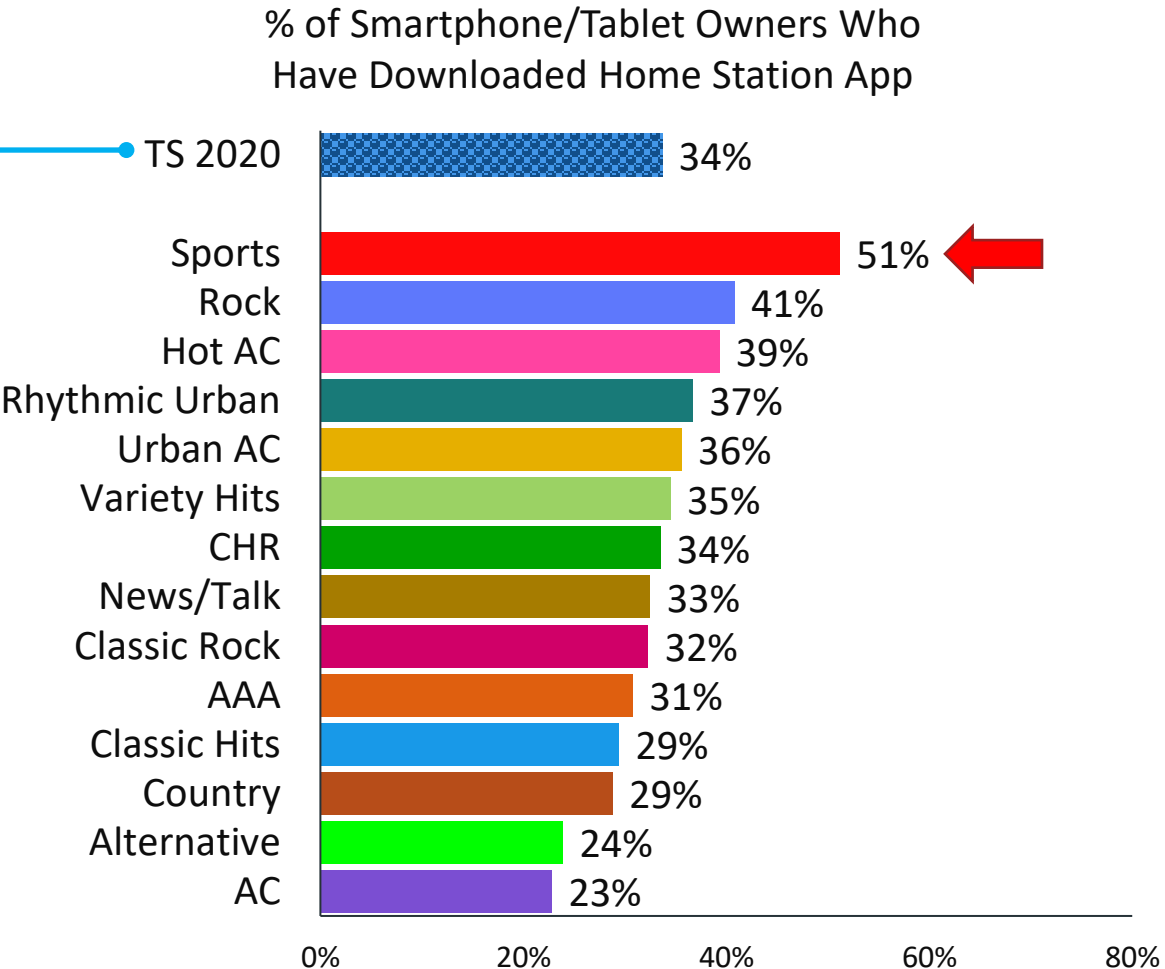
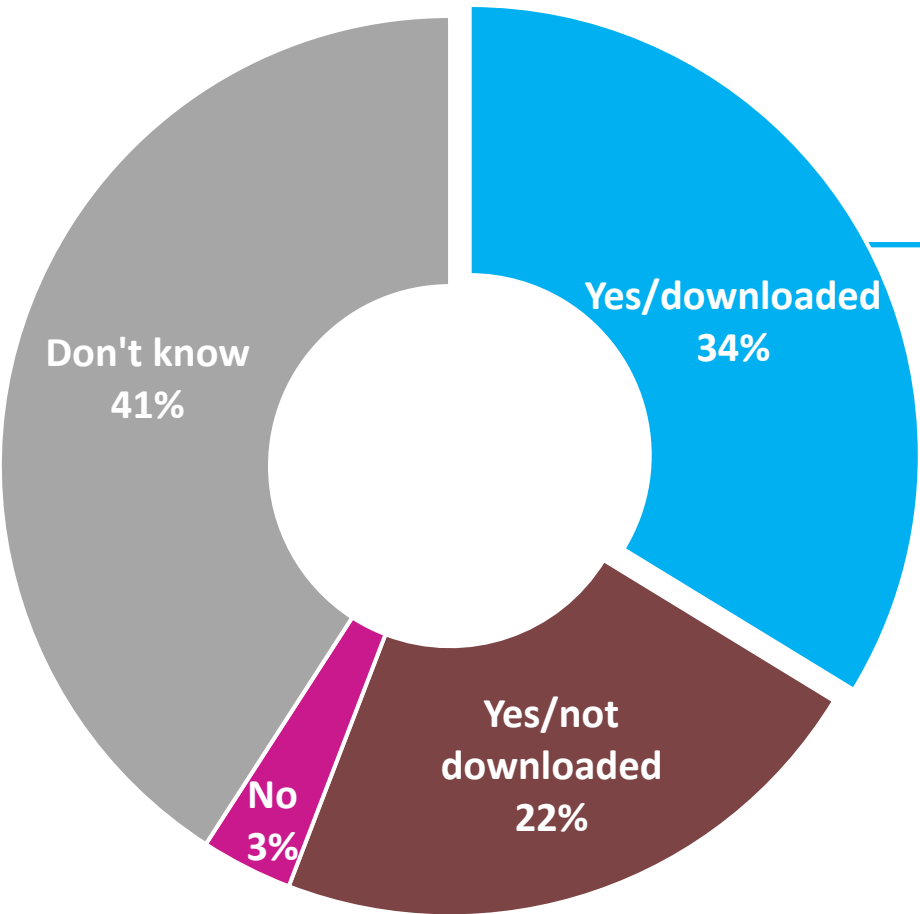


"How often do you access/interact with THE STATION THAT SENT YOU THIS SURVEY using: streaming via a mobile app?"

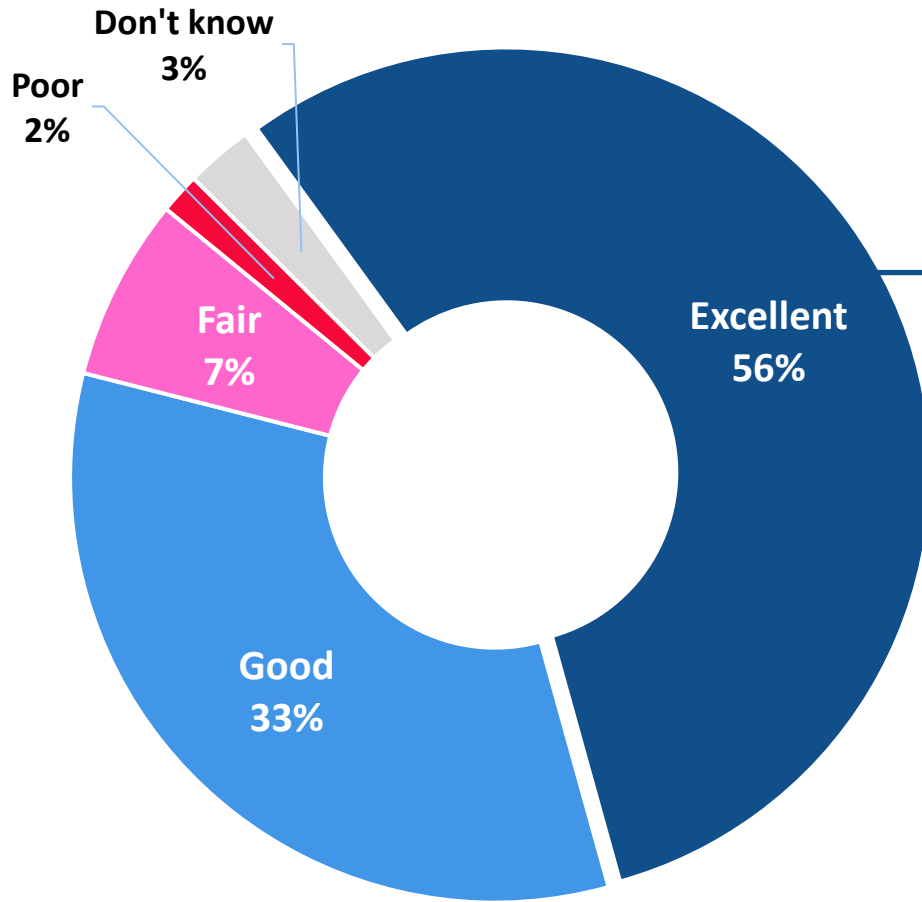
More Than Half Are Aware Their Home Station Has an App; About One in Three Has Downloaded It



More Than Half Are Aware Their Home Station Has an App; About One in Three Has Downloaded It, Led by Sports Fans

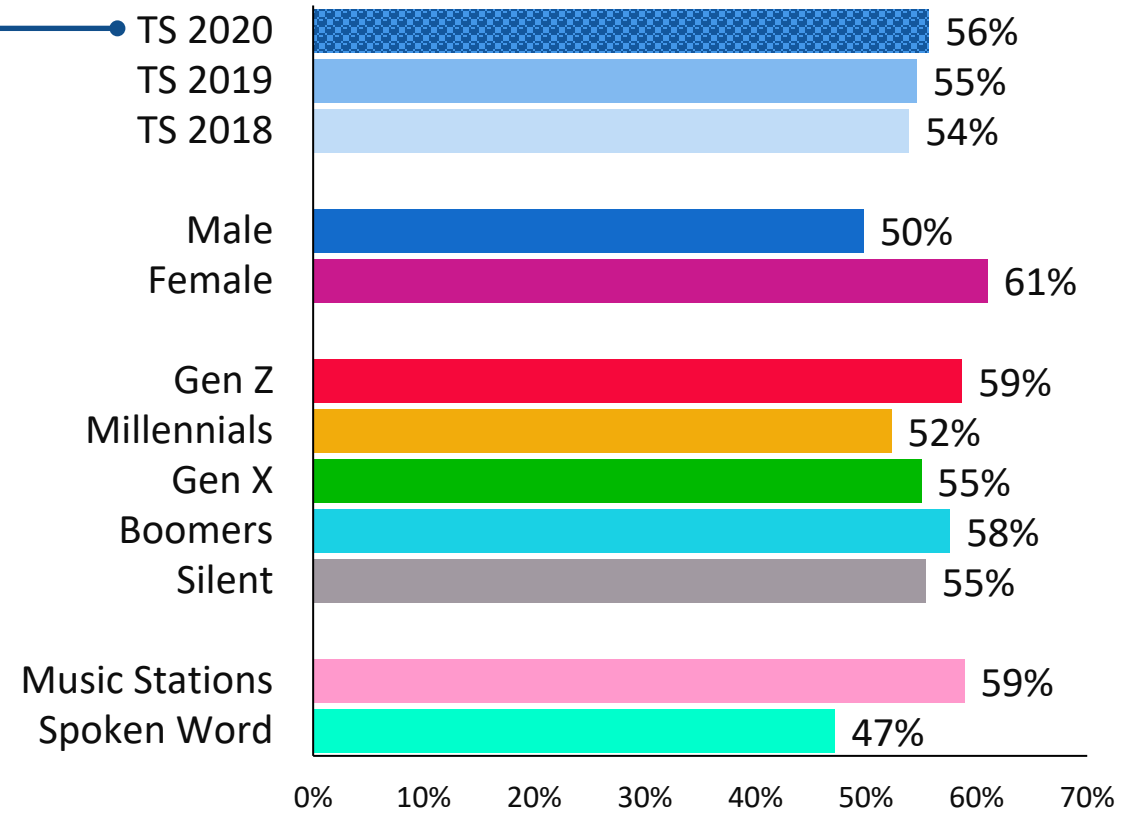


More Than Half of Those Who Have Downloaded Their Home Station's App Rate It as Excellent



"Overall, how would you rate THE STATION THAT SENT YOU THIS SURVEY'S app?"

% Who Rate Their Home Station's App as "Excellent"

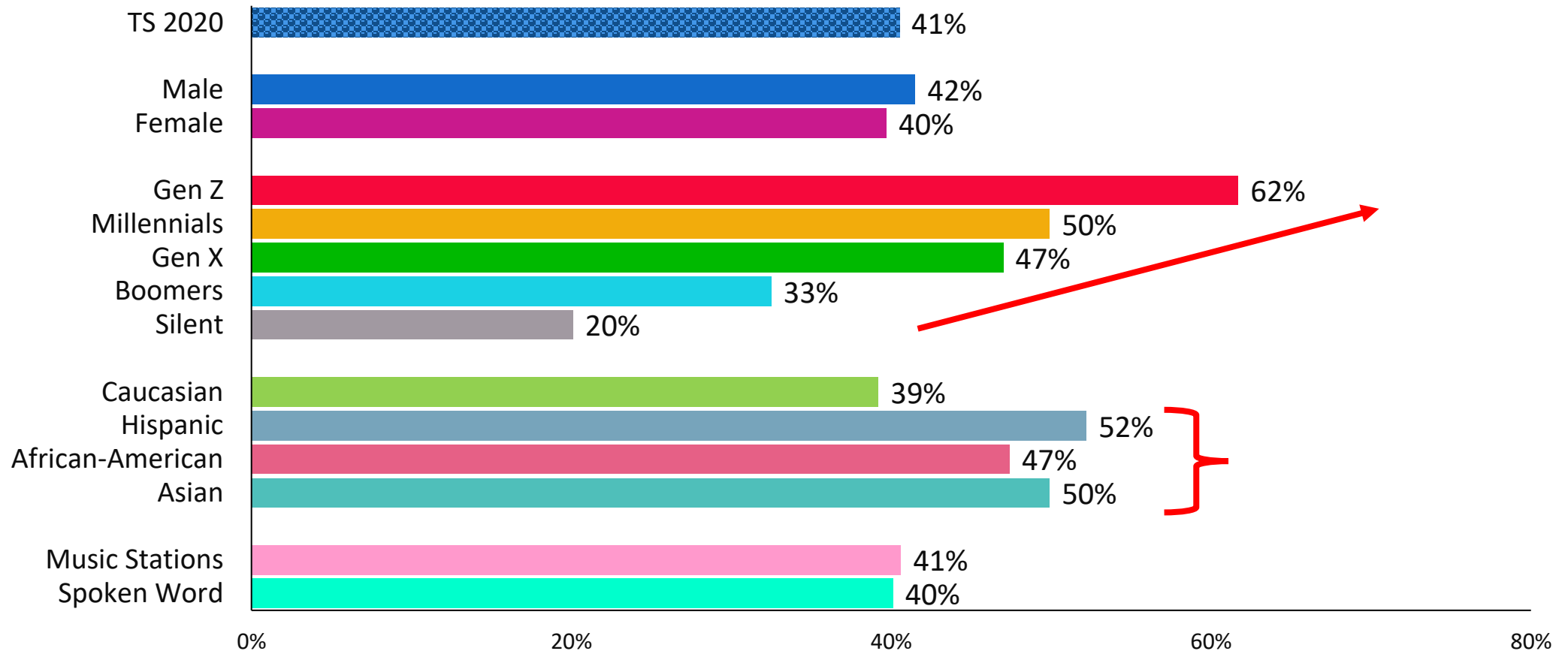


Among smartphone and/or tablet owners
who have downloaded their home station's app



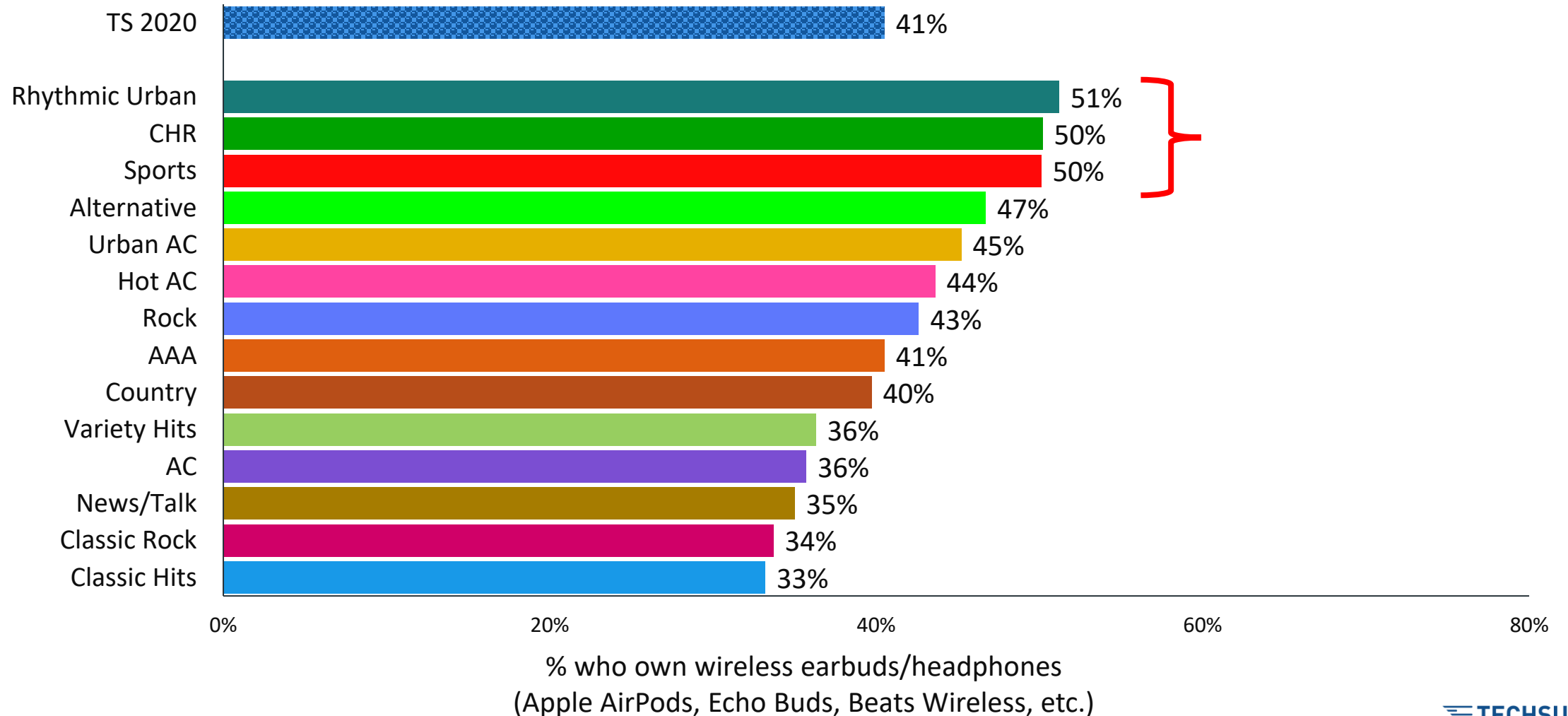
Headphones & “Hearables”

Four in Ten Own “Hearables,” Especially Younger & Ethnic Respondents

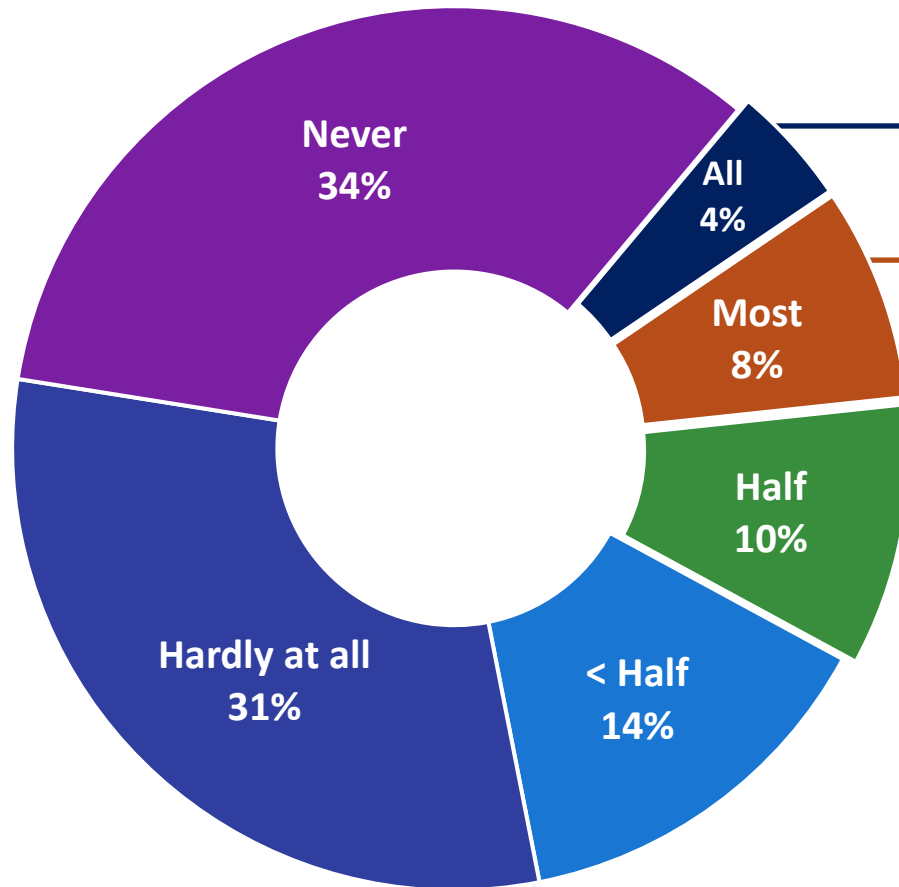


% who own wireless headphones/earbuds
(Apple AirPods, Echo Buds, Beats Wireless, etc.)

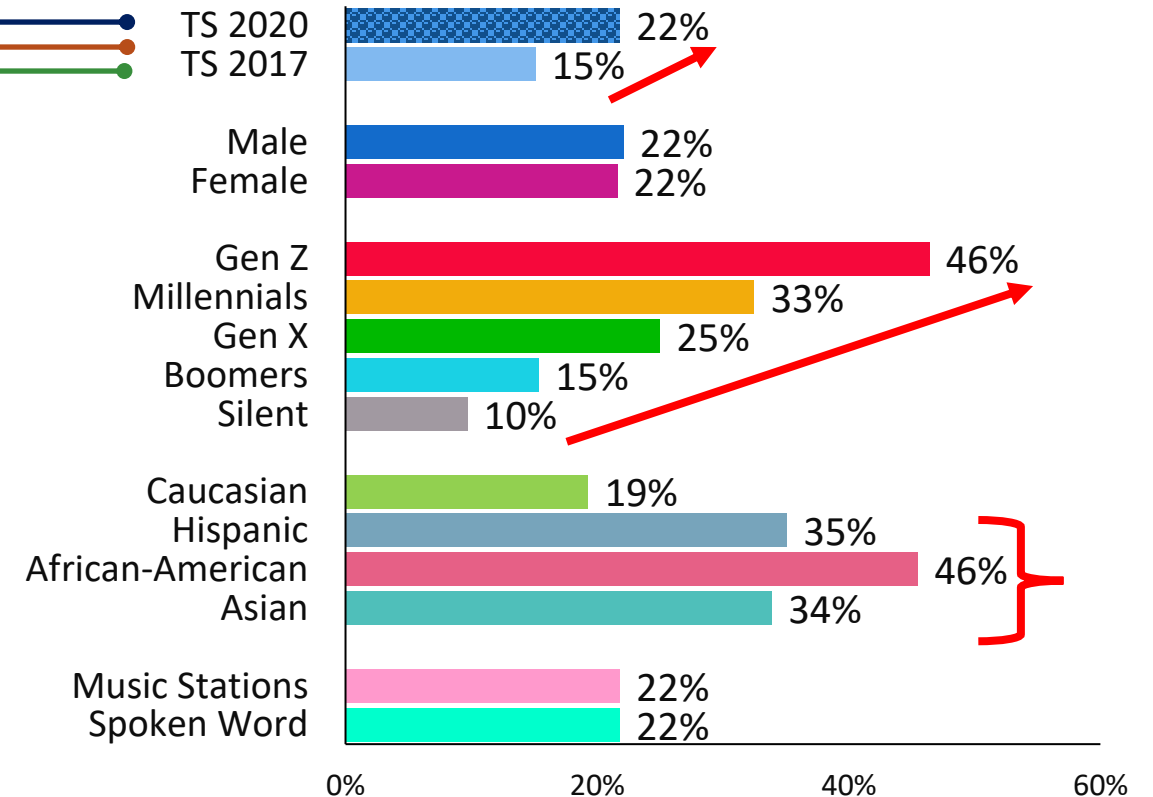
Rhythmic Urban, CHR & Sports Radio Fans Are Most Likely to Own “Hearables”



More than One in Five Uses Headphones/Earbuds for AM/FM Radio Listening at Least Half the Time



% Saying At Least Half of AM/FM Radio Listening Is Using Headphones/Earbuds

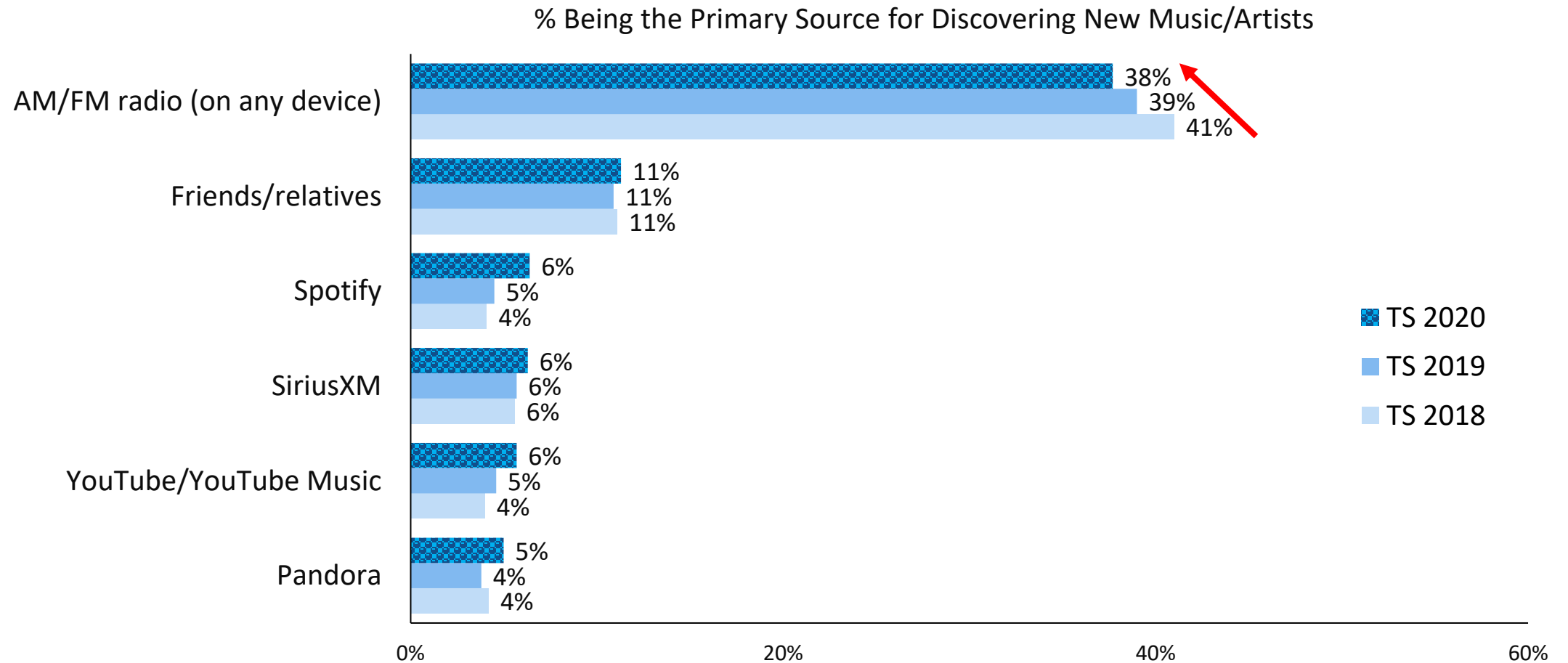


“Thinking about the time you spend listening to AM/FM Radio (on a regular radio, streaming, etc.), how often do you listen using headphones or earbuds (either wired or wireless)?”



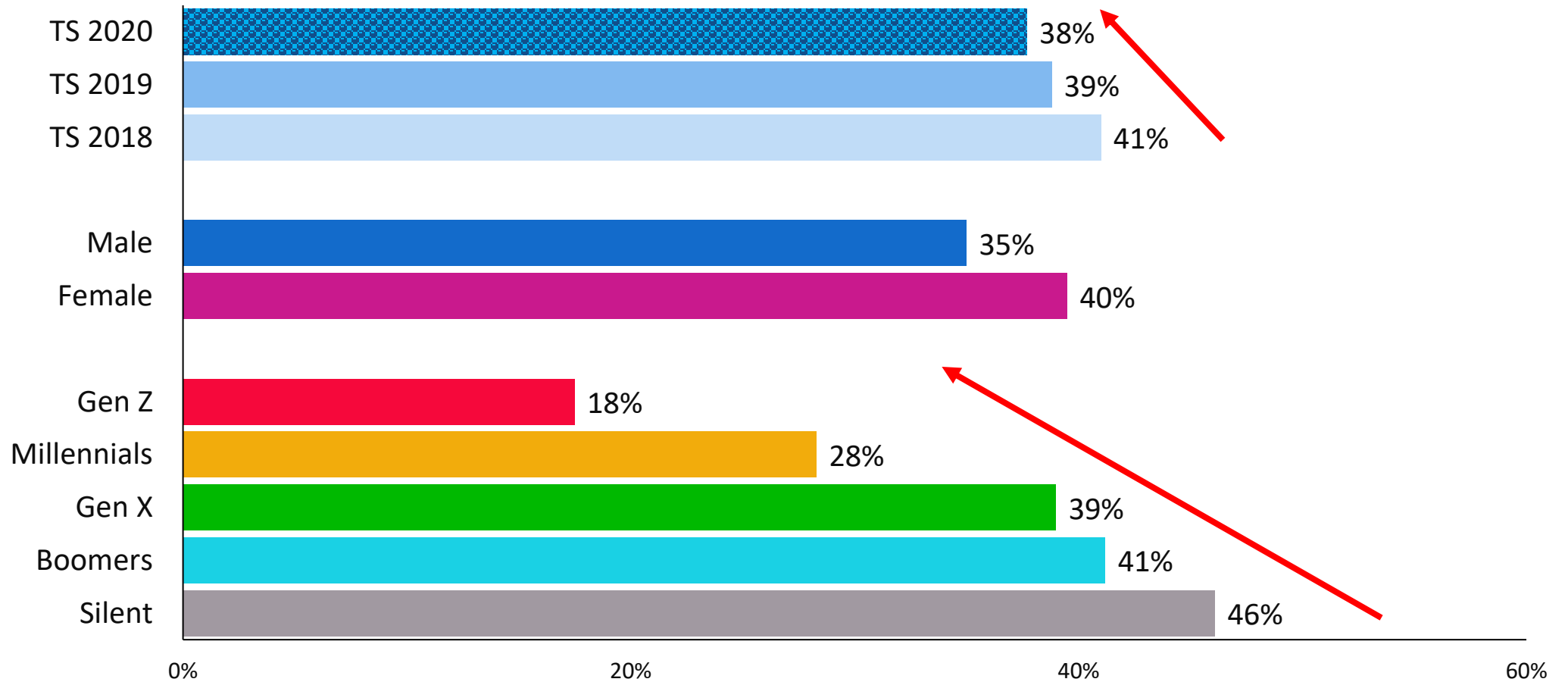
Music Discovery

AM/FM Radio Remains the Primary Music Discovery Source, But It's Trending Down; Other Sources Are Well Behind



Among the 77% interested in new music/artists
(platforms 5% or greater shown)

AM/FM Is Still the Primary Music Discovery Source, But Is Losing Ground Among Gen Zers & Millennials

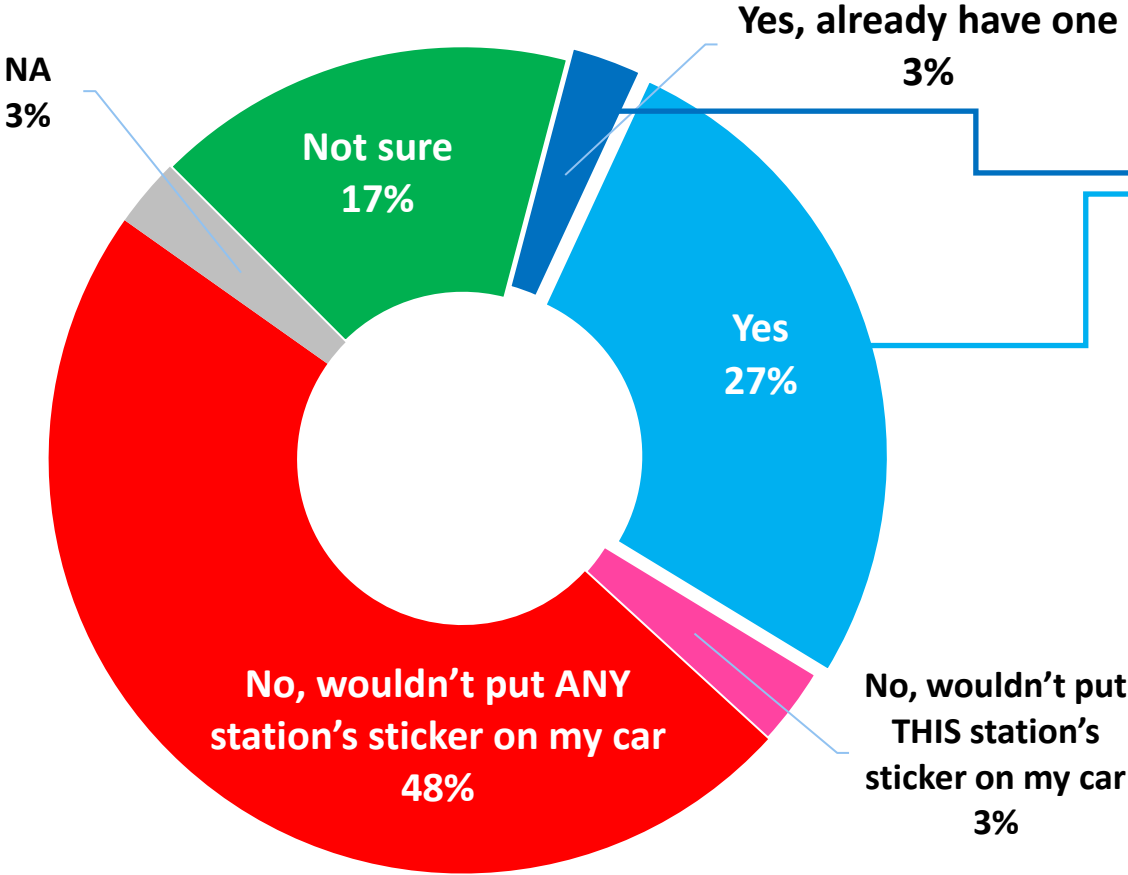


Among the 77% interested in new music/artists, who use AM/FM radio (on any device) as their primary source for discovering new music/artists

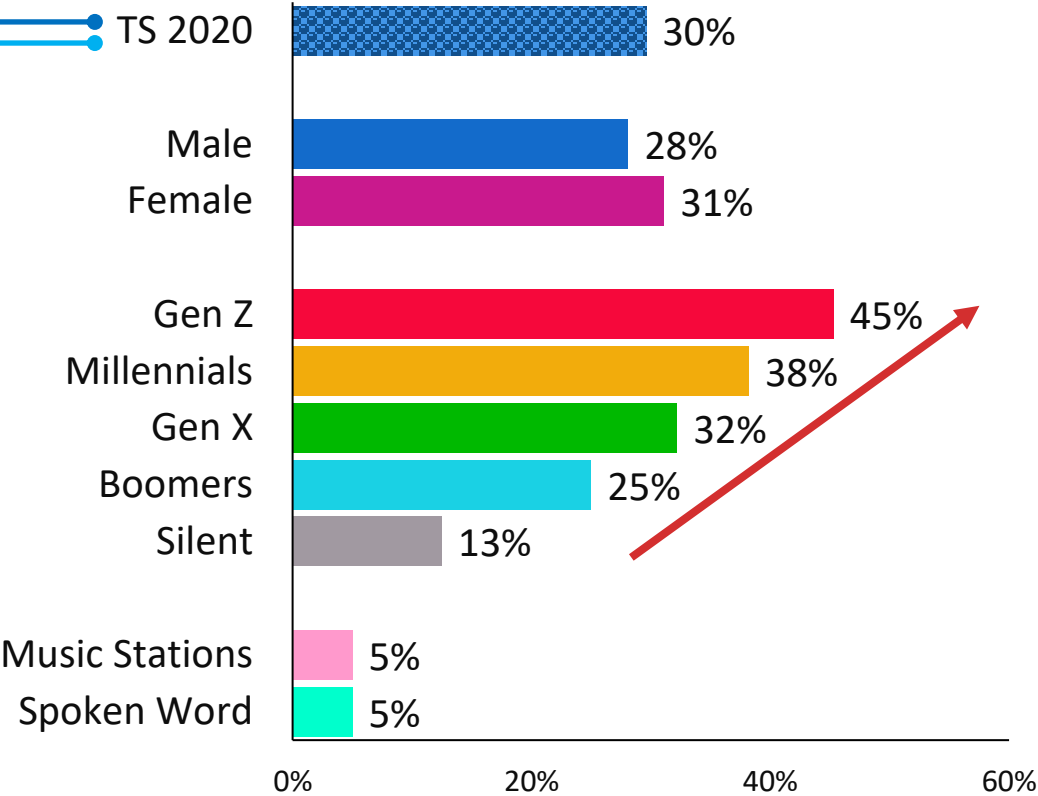


Bumper Stickers

More Than One in Four Say They Would Put Their Home Station's Bumper Sticker on Their Car If It Were Available

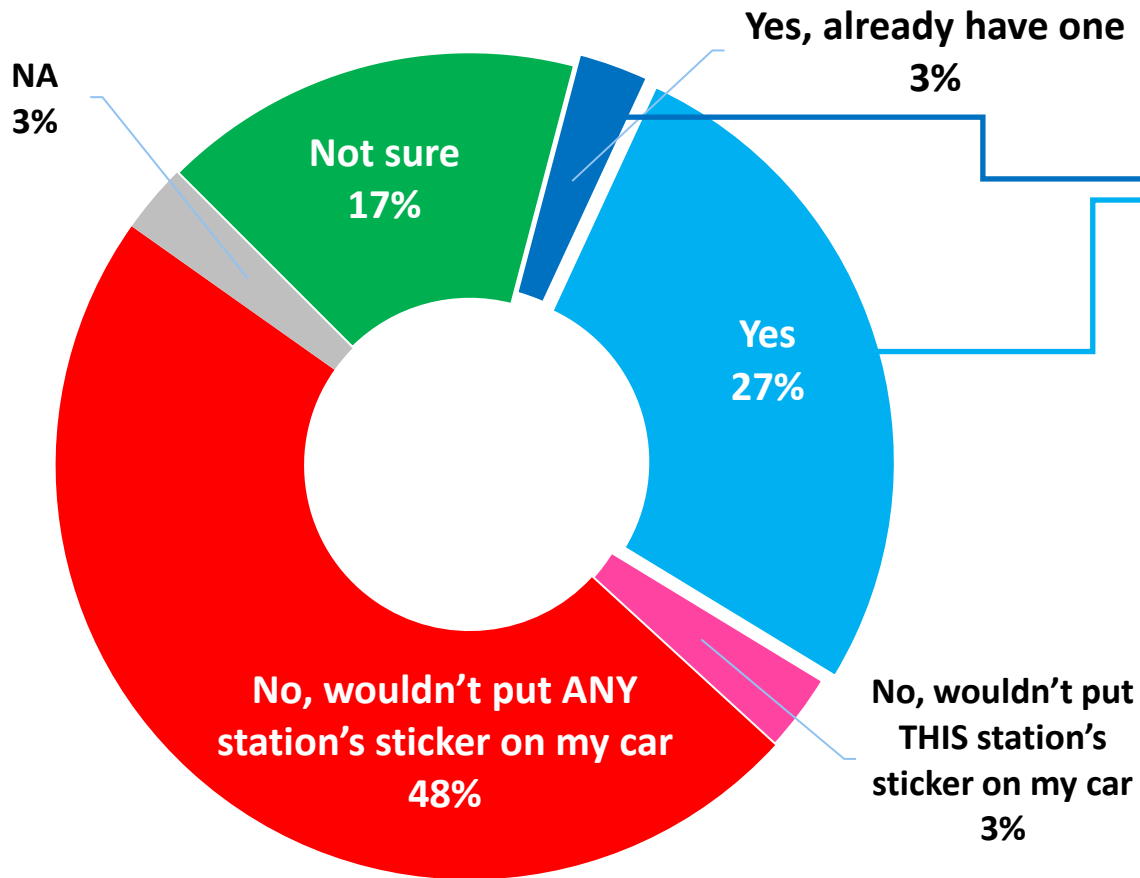


% Who Would Put Home Station's Bumper Sticker On Their Car If Available

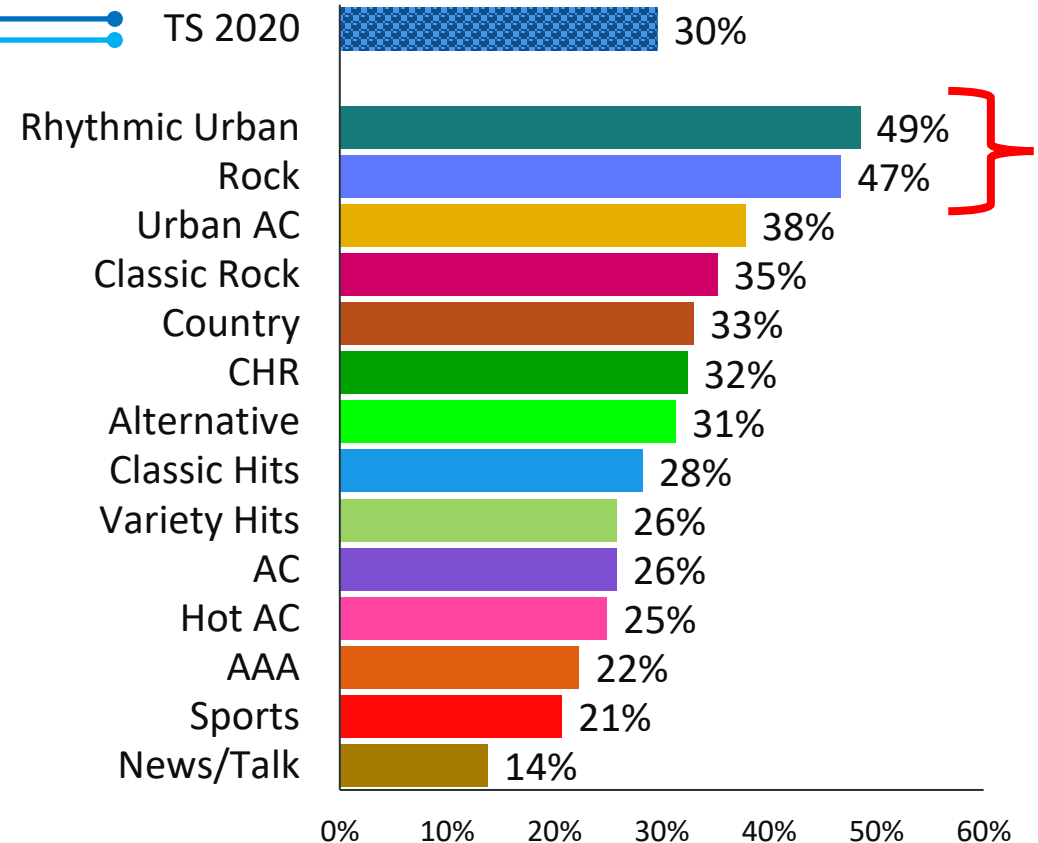


"If they gave them away, would you put a bumper sticker for THE STATION THAT SENT YOU THIS SURVEY on your car?"

Rhythmic Urban and Rock Are Fans Would Be Most Likely to Put a Favorite Station's Bumper Sticker on Their Car



% Who Would Put Their Home Station's Bumper Sticker On Their Car If One Were Available

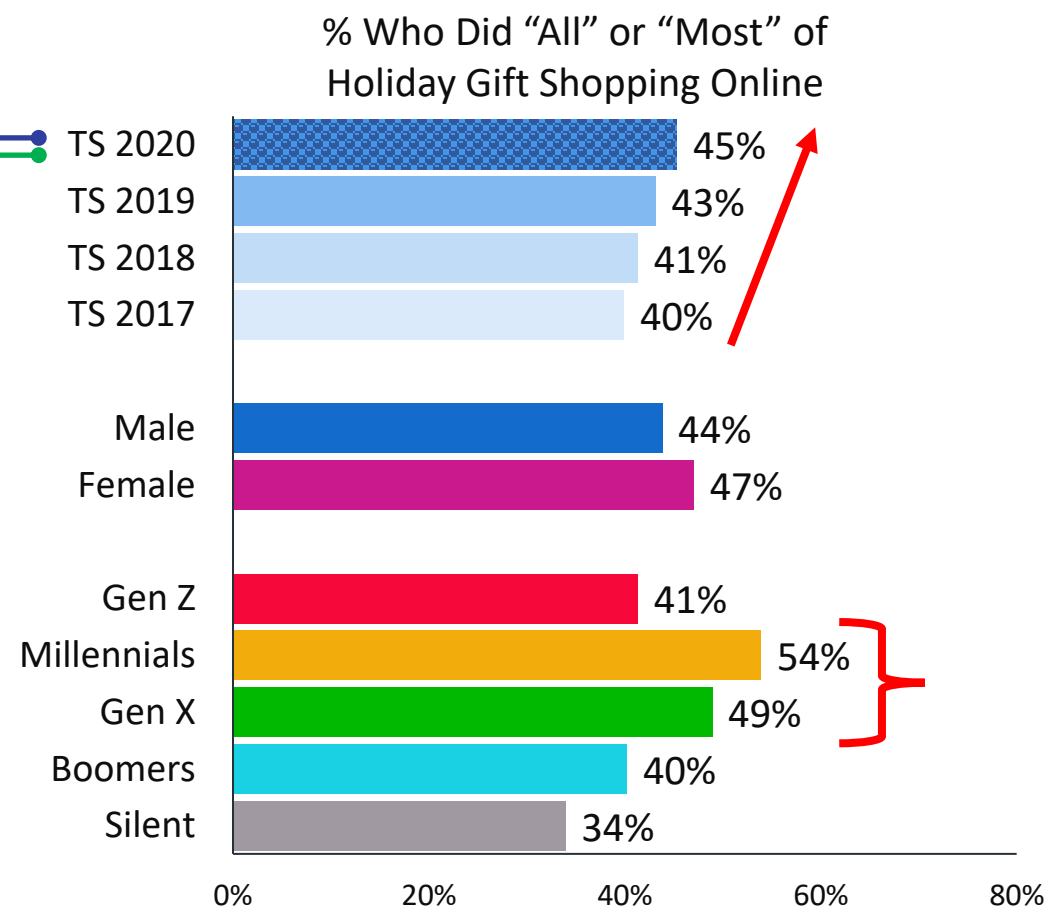
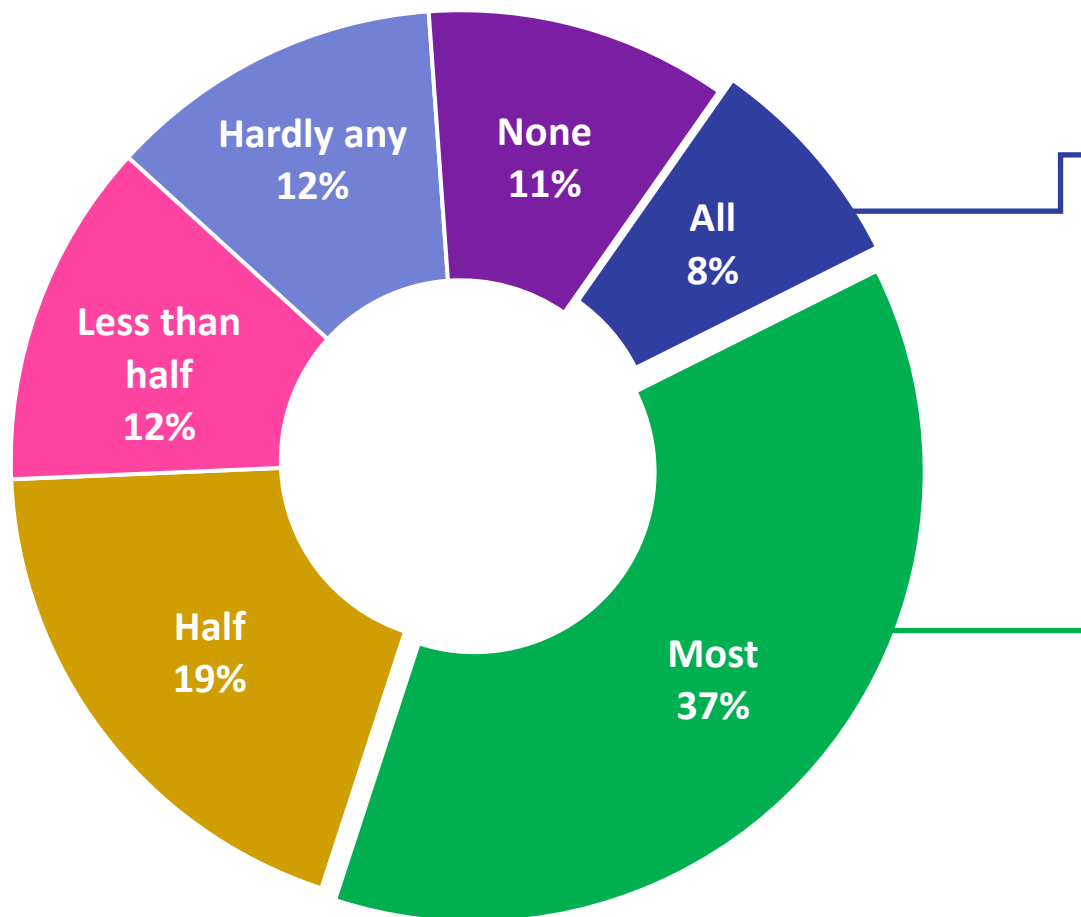


"If they gave them away, would you put a bumper sticker for THE STATION THAT SENT YOU THIS SURVEY on your car?"

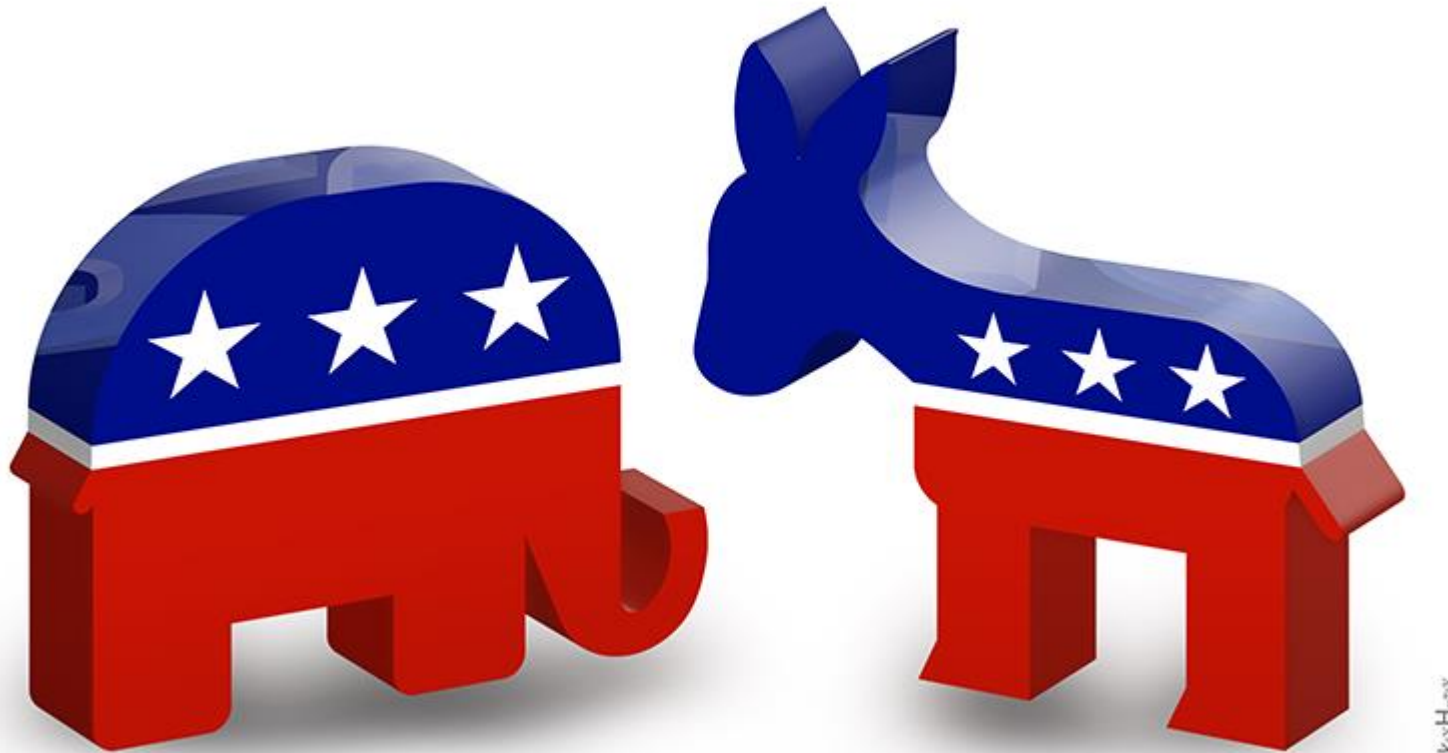


Online Holiday Shopping

Nearly Half Did All or Most of Their 2019 Holiday Gift Shopping Online, Especially Millennials & Gen Xers

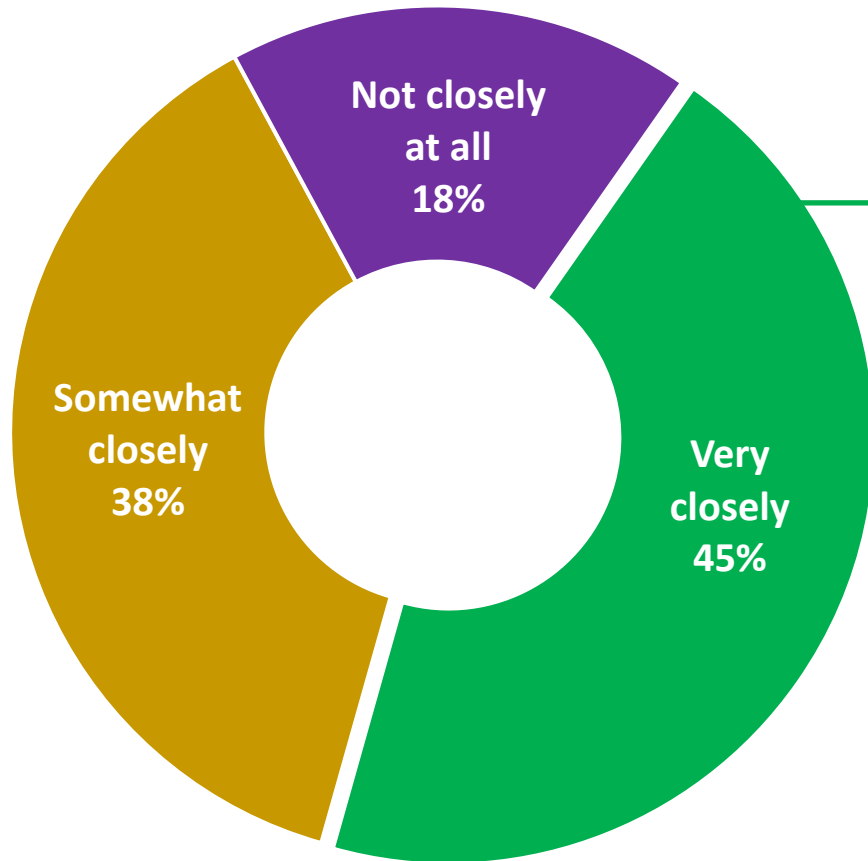


"During the holiday season, how much of your gift shopping was online?"

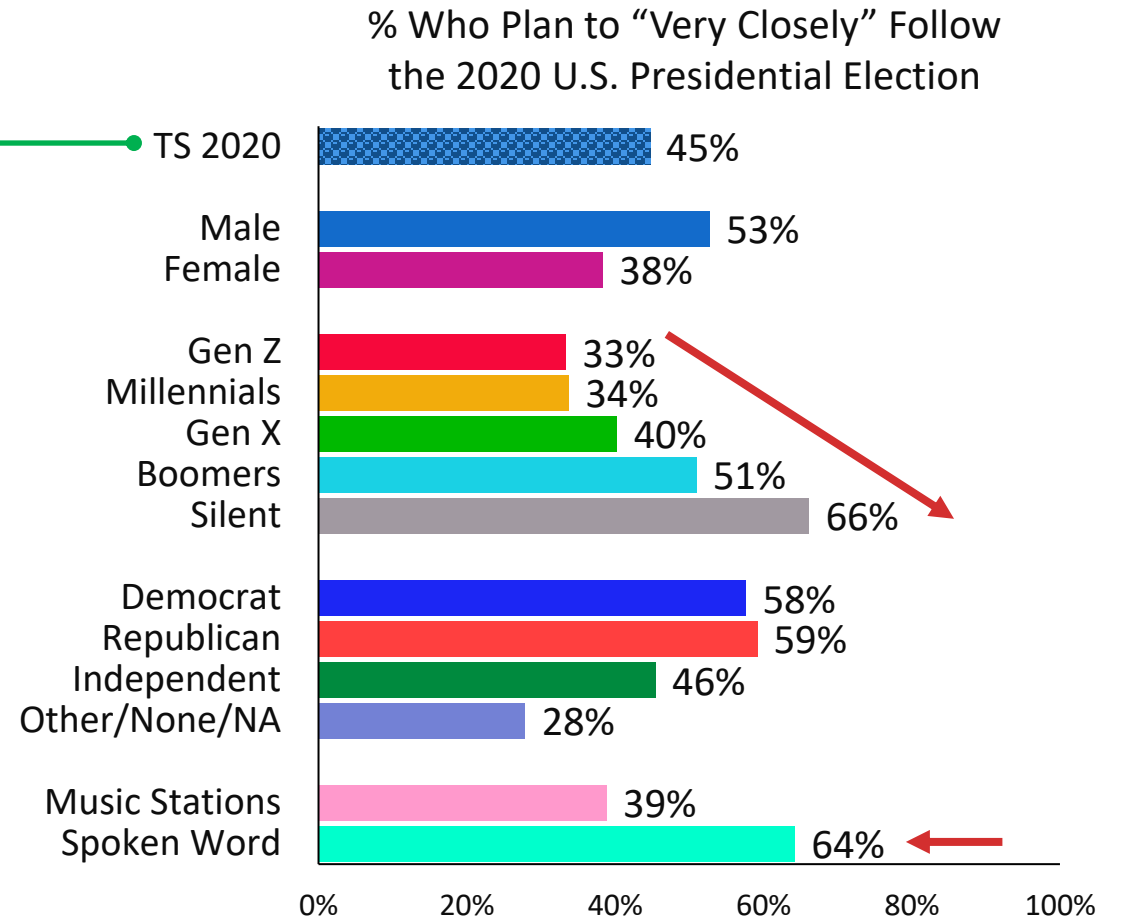


The Politics of Radio

Almost Half Plan to Very Closely Follow the U.S. Presidential Election, Especially Among Men, Older Generations & Spoken Word Fans

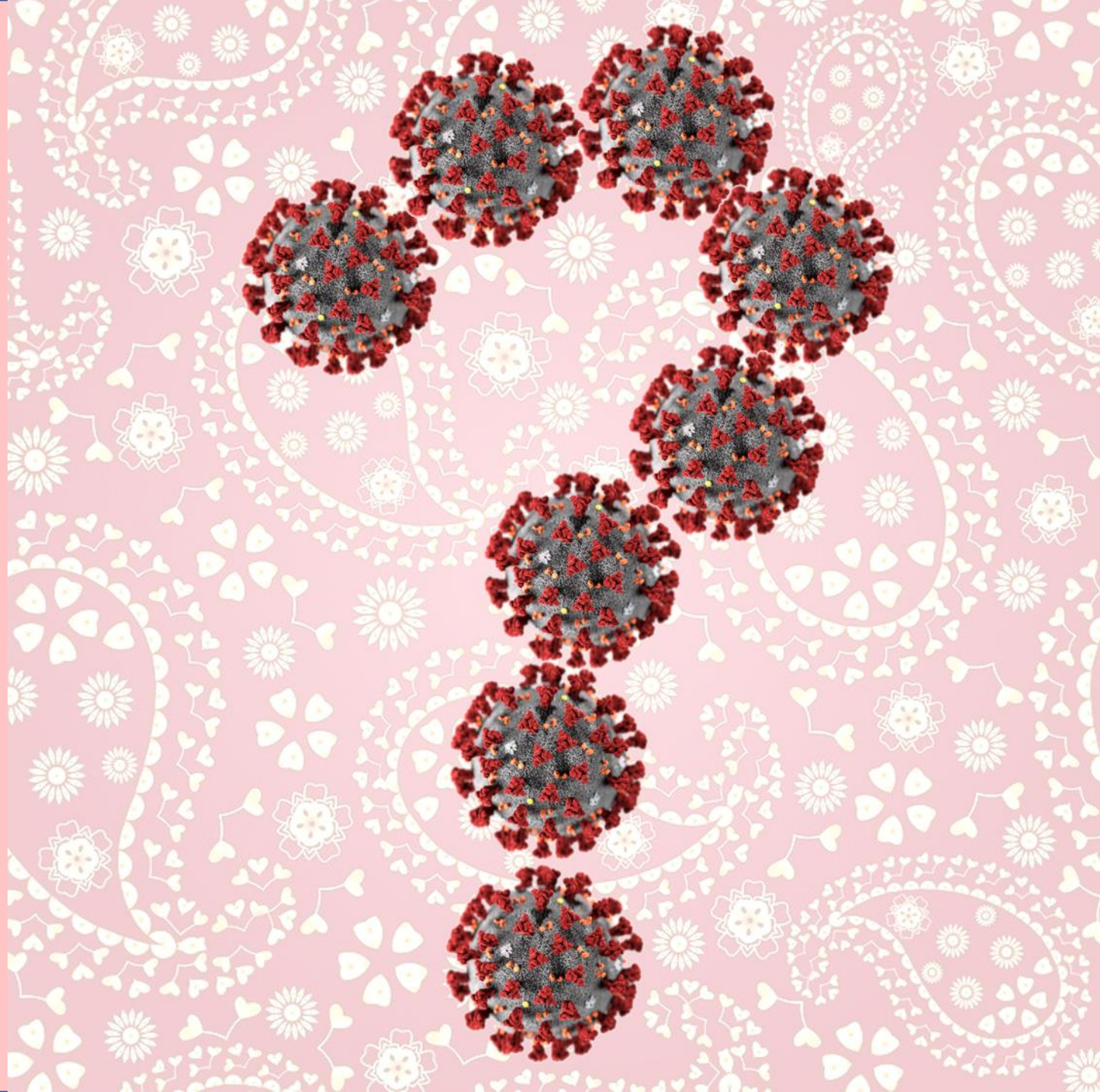


"How closely do you plan on following the 2020 U.S. Presidential Election coverage?"





Takeaways



Key Findings

- Smart TVs are everywhere & video streaming is exploding
- Radio may rule in the car & at work, but has eroded in homes
- Radio's digital consumption is still secondary
- Station apps have become popular but many don't know they exist
- Smart speakers may be an answer but stations aren't always promoting them
- Subscription fees are a problem – and a big plus is radio is FREE
- Radio personalities matter
- Many (especially) women love radio because of the “emotional benefits”
- Radio being local is the “secret sauce” – now more than ever

Now What?

- ✔ Clean up your stream – in the home it's the only way many can listen
- ✔ If you can switch to TLR, do so. It's a better experience for most stations
- ✔ Promote your app. Promote your app.
- ✔ Test drive your smart speaker commands & then heavily promote them
- ✔ Metadata/RDS in cars is another way to message your listeners
- ✔ Use your email database & social media for consistent strategic messaging
- ✔ Lean into your personalities (if you have them)
- ✔ Fill your audience's emotional needs (& don't forget about your women)
- ✔ Local, local, local – the “secret sauce” no one else can provide
- ✔ Oh – and radio is free at a time when charge card bills will be scrutinized

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