



Jacobs
media strategies

Executive Summary

 **TECHSURVEY**
 **2021** JACOBS MEDIA

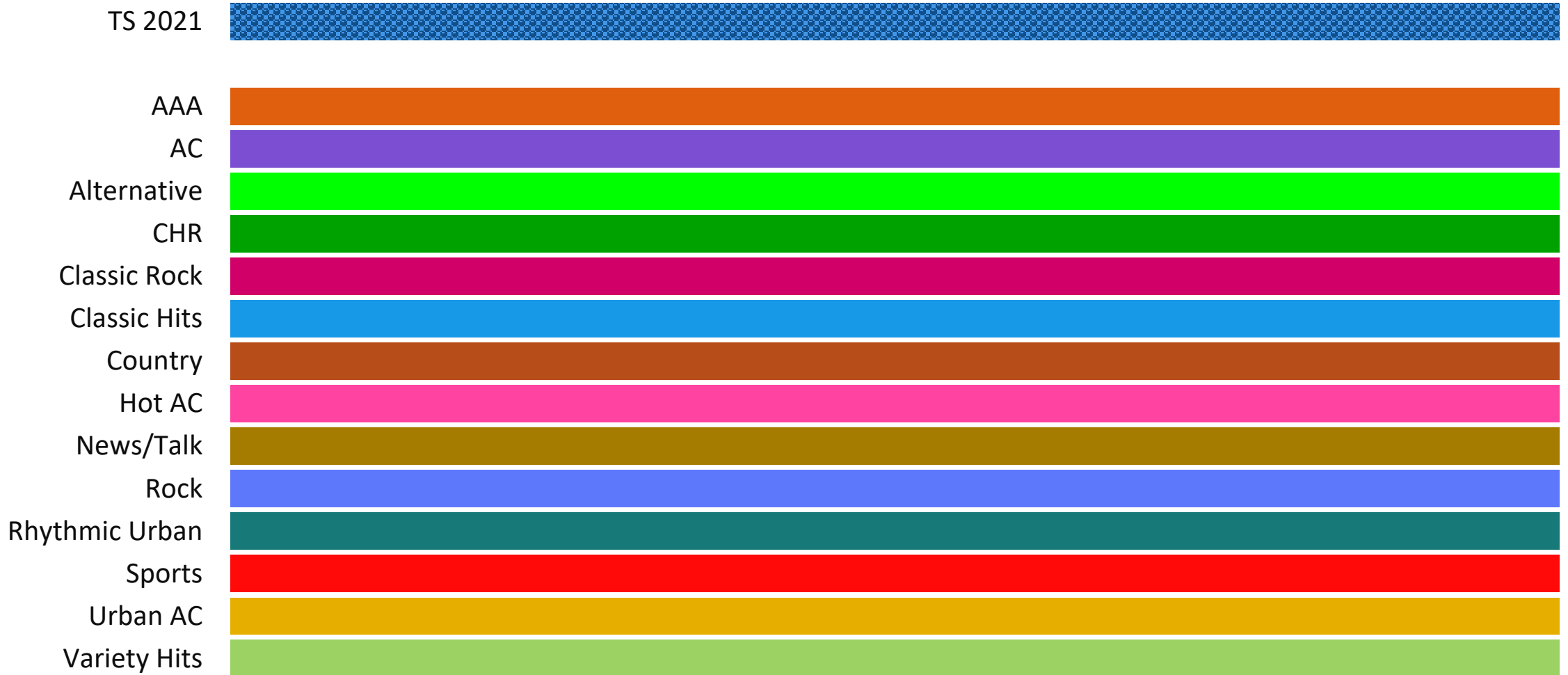
Radio in the Year of COVID



Methodology

- 470 commercial radio stations in the U.S. & Canada
- N = 42,224
- Interview dates: January 5 - February 7, 2021 (during COVID)
- TS 2020 was pre-COVID (January/February 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 2020 market population data.
- This is a web survey and does not represent all commercial radio listeners or each station's audience. It is not quotaed to the U.S./Canadian populations.
- "P1" station refers to the station that sent the survey

Format Key



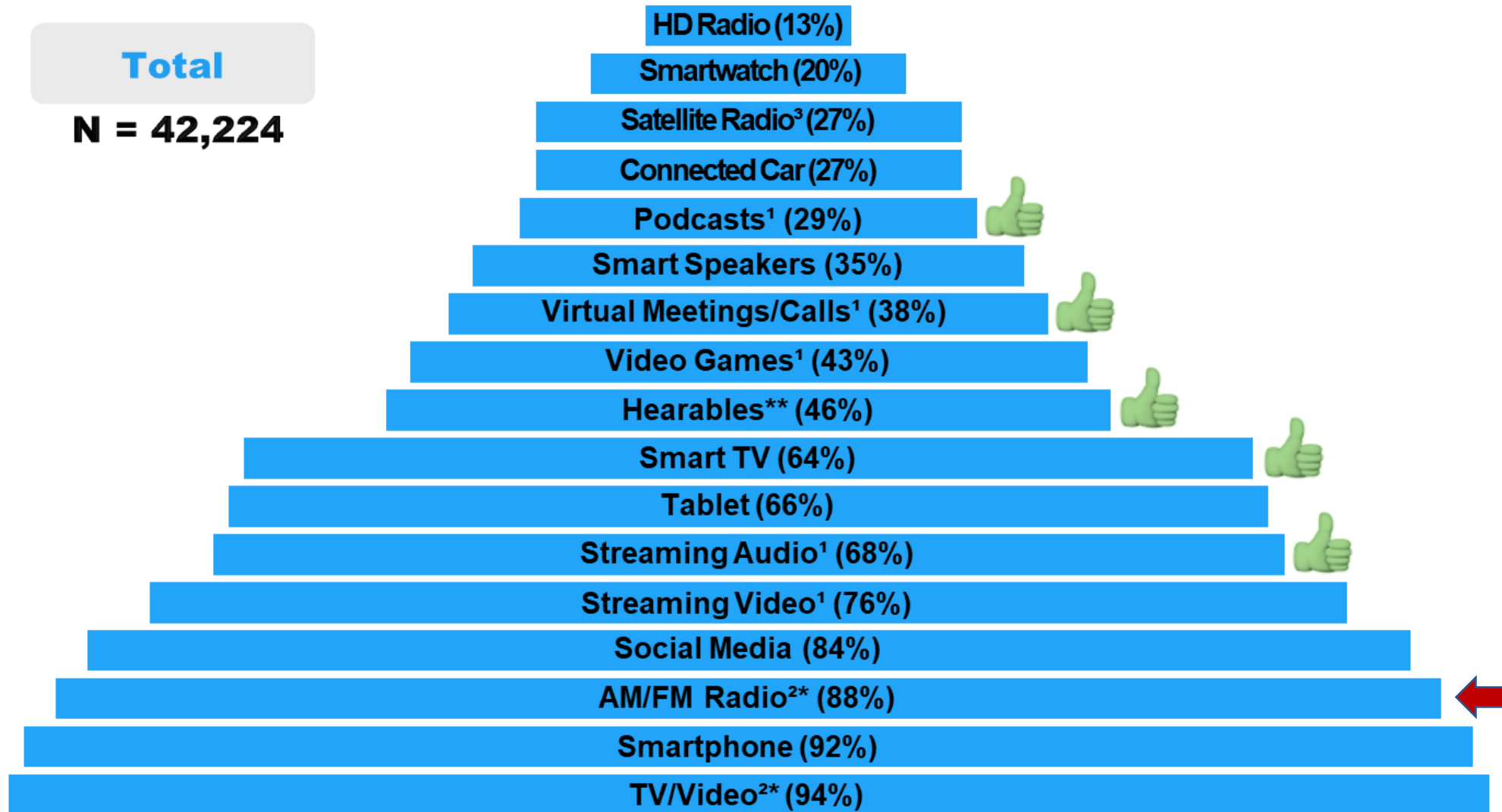




Media Pyramid 2021

Total

N = 42,224



**Total
TS 2020**

12%

18%

26%

27%

26%

33%

45%

40%

60%

68%

65%

74%

86%

90%

92%

95%

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



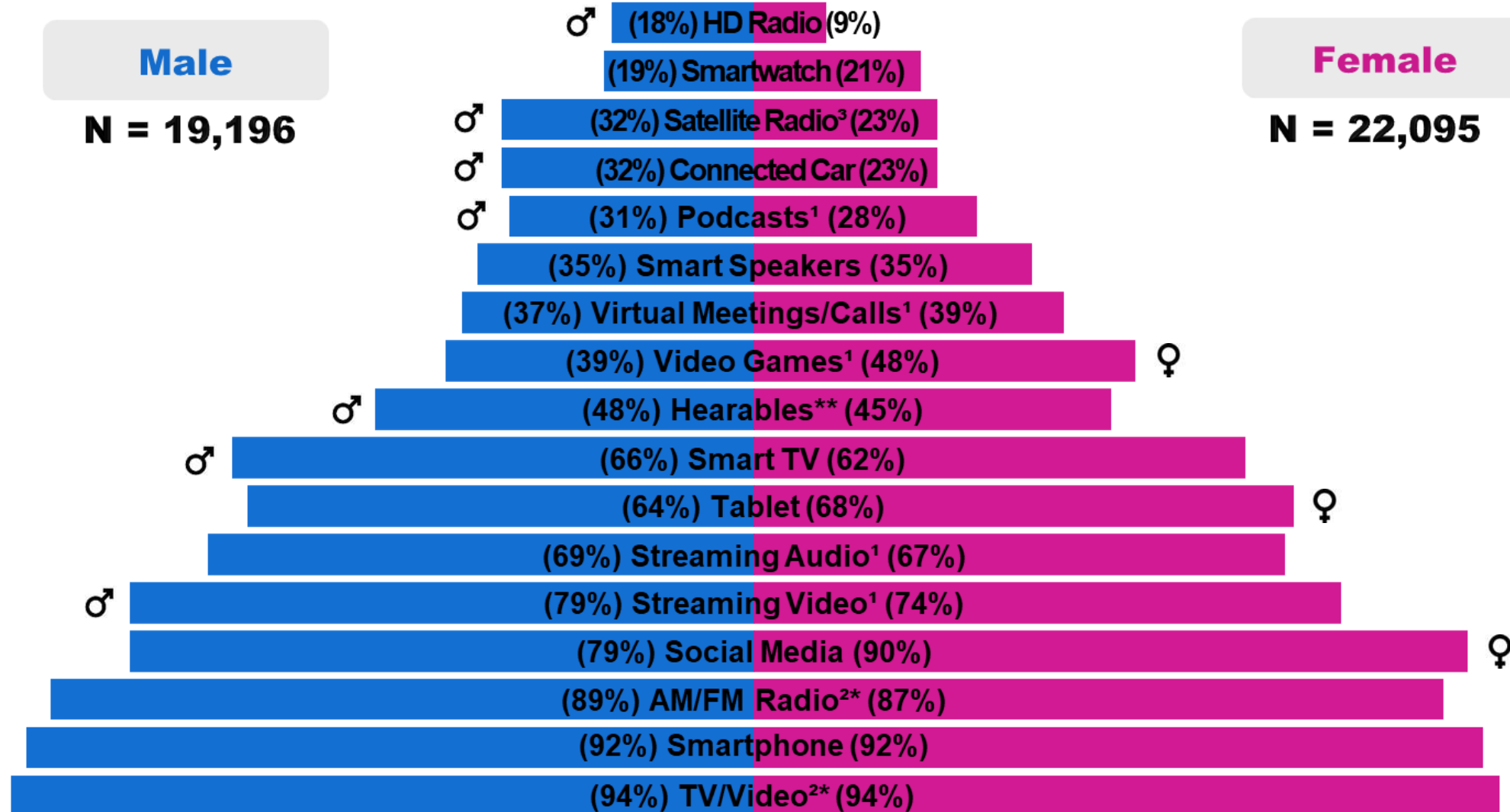
Media Pyramid 2021

Male

N = 19,196

Female

N = 22,095



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



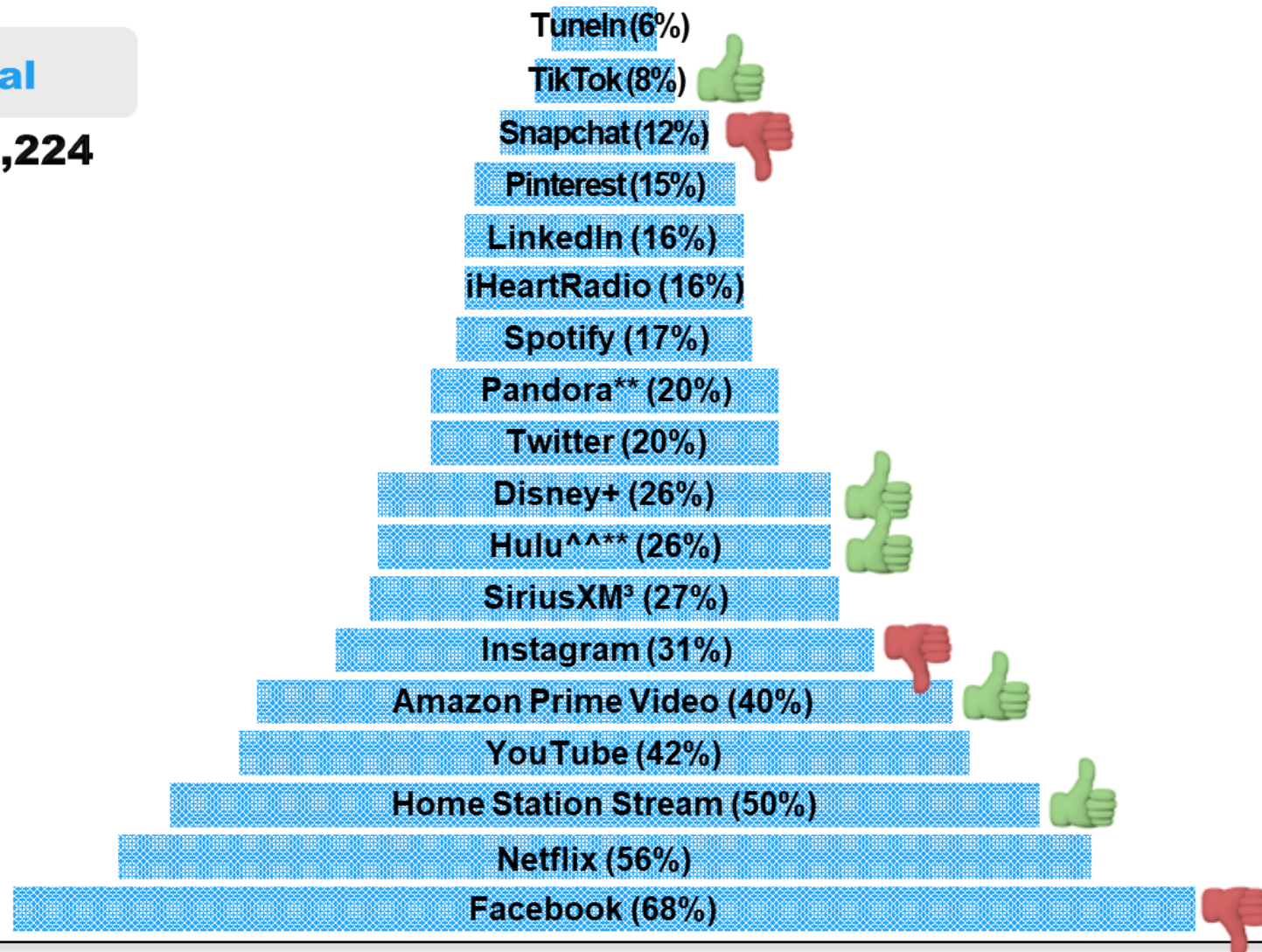
Media Brand Pyramids



Brand Pyramid 2021

Total

N = 42,224



**Total
TS 2020**

5%

3%

16%

17%

17%

15%

16%

21%

22%

21%

23%

26%

34%

37%

41%

47%

55%

72%

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



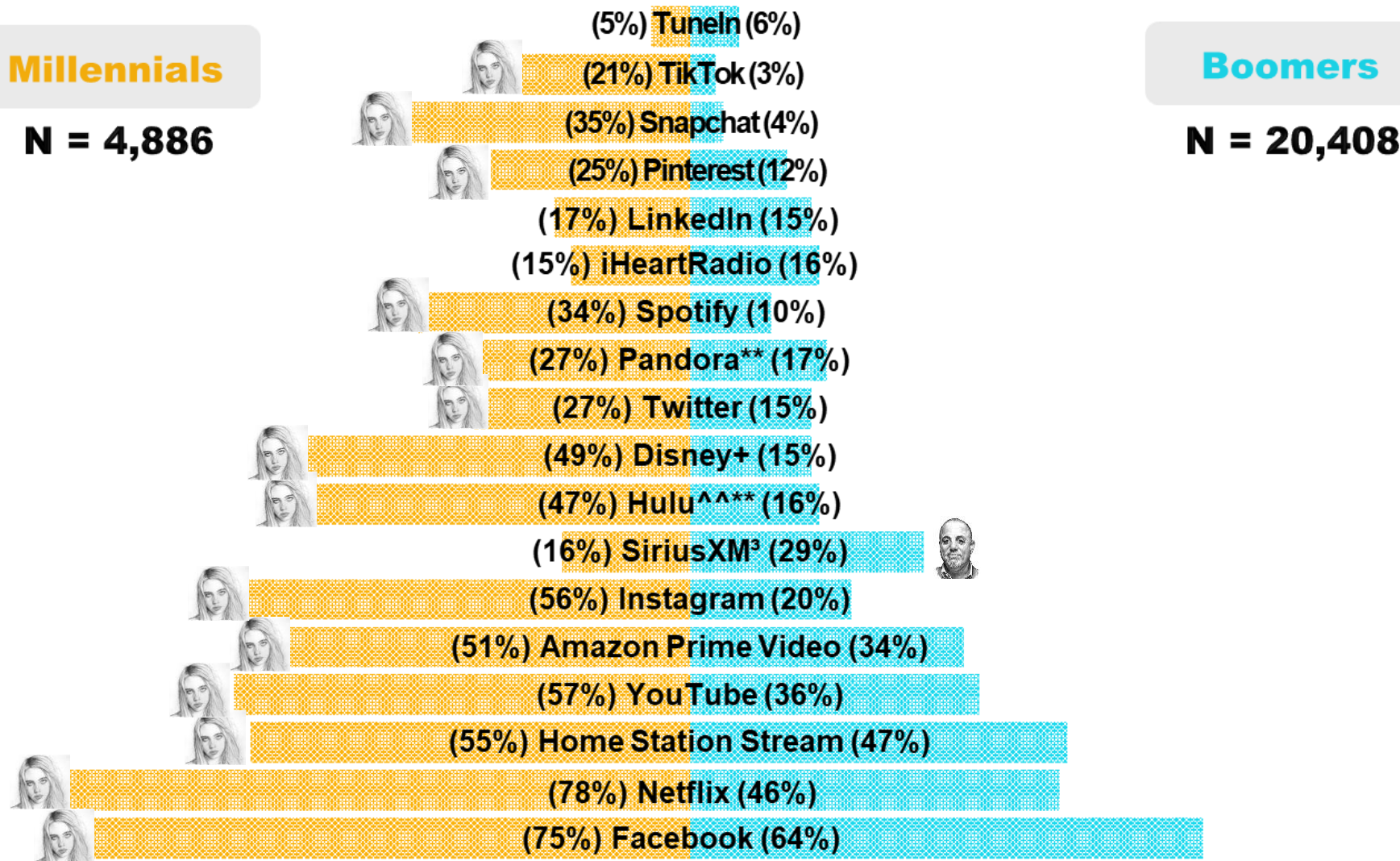
Brand Pyramid 2021

Millennials

N = 4,886

Boomers

N = 20,408



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

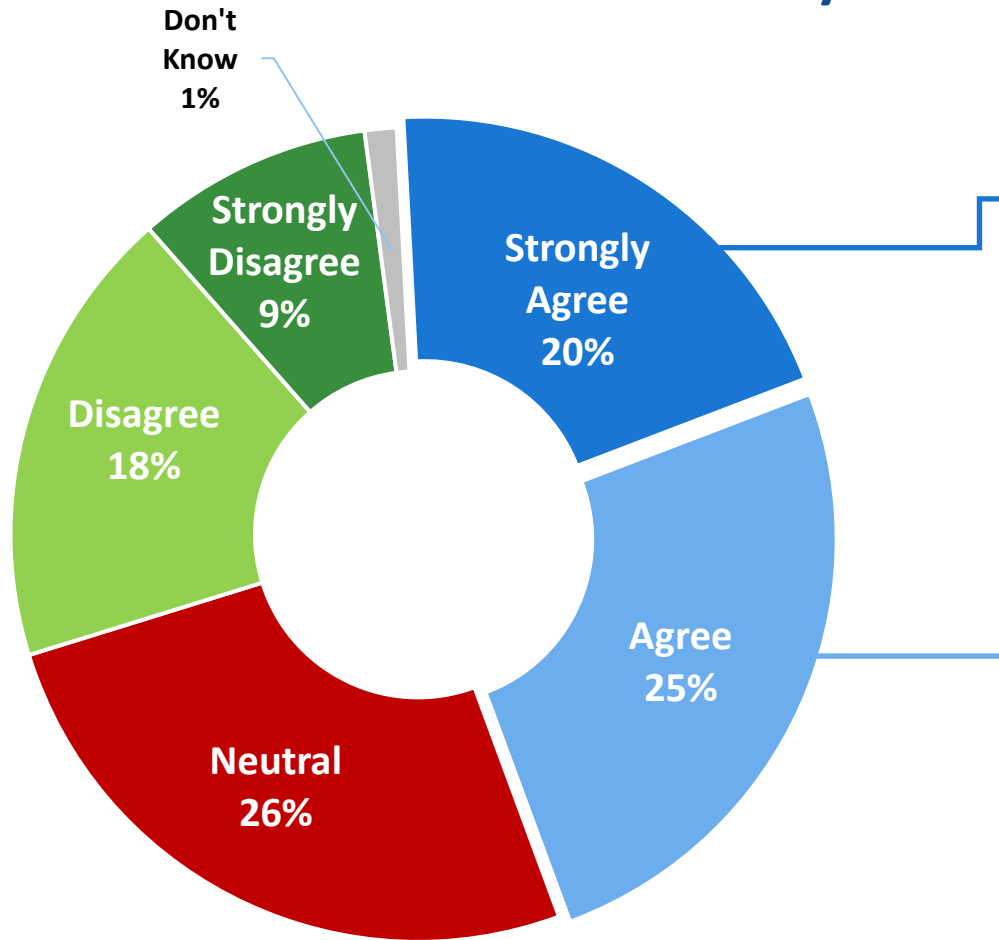


Key Takeaways

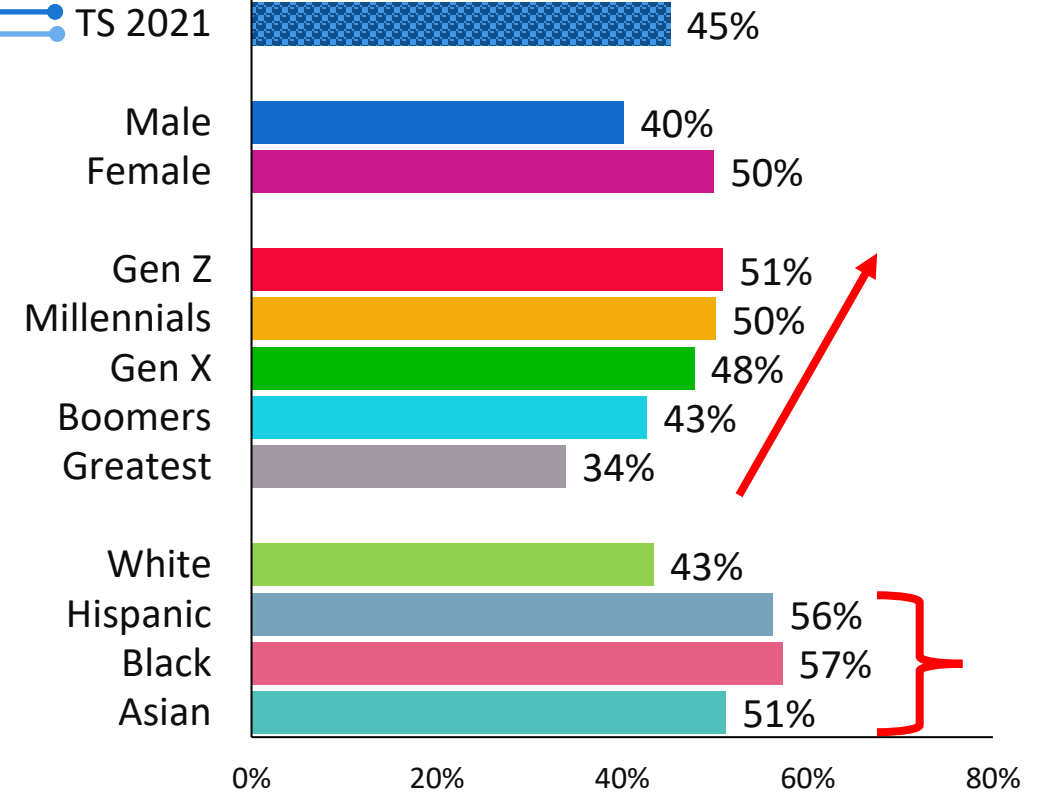


COVID's Big Disruptions: finances & lifestyle activities

Close to Half Say They Are More Worried About Money Today Than One Year Ago

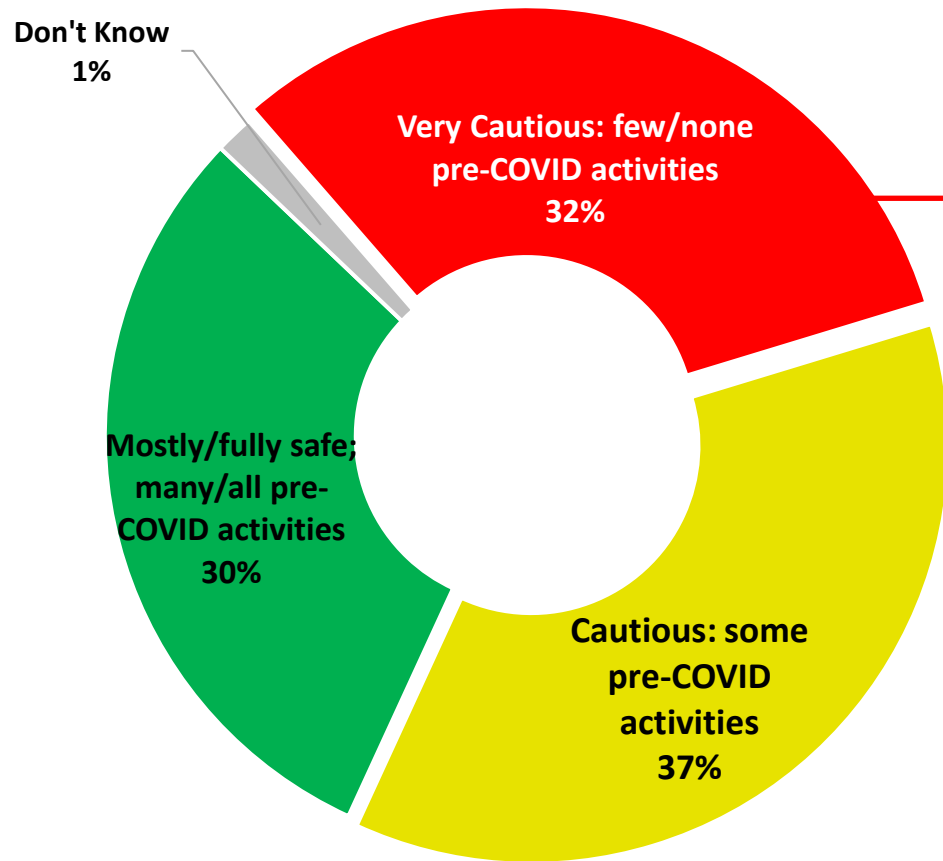


% Agreement (Strongly Agree + Agree)

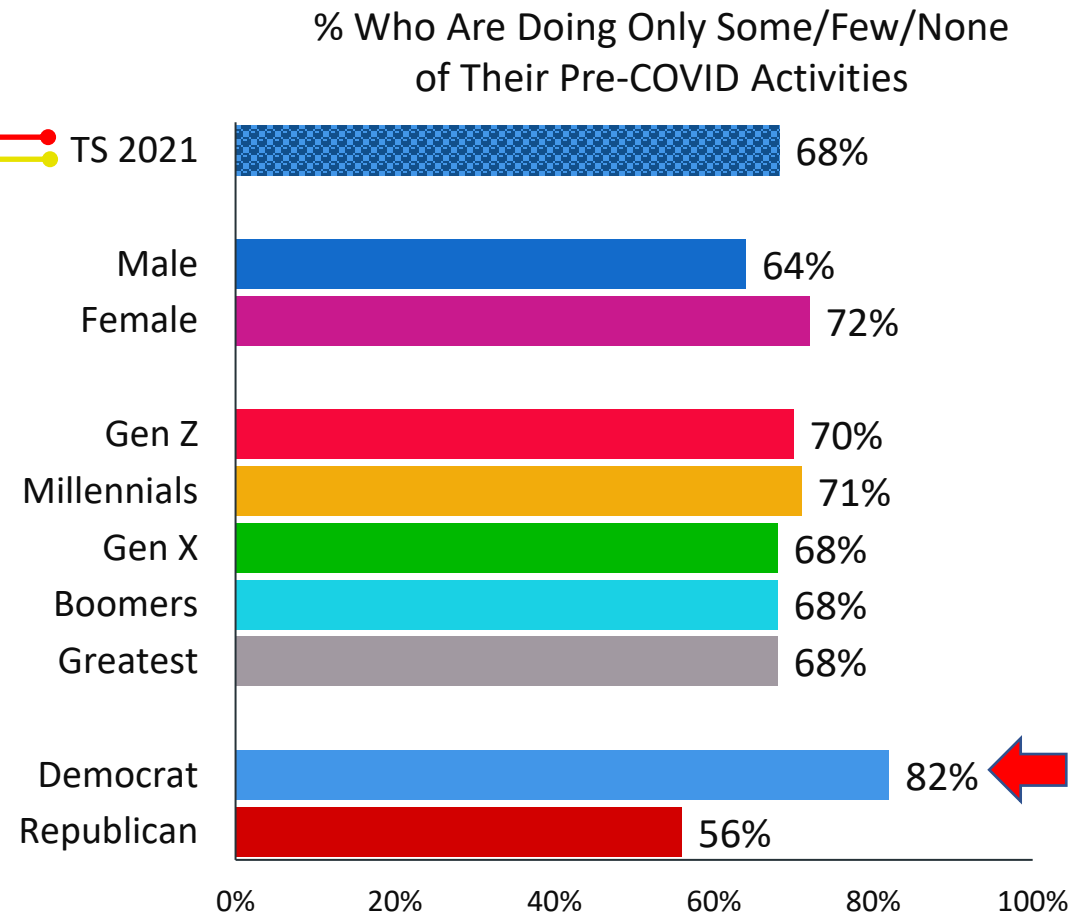


"Compared to one year ago, I'm worried more now about my household's financial situation"

Democrats Are Especially Cautious About Returning to Their Pre-COVID Activities



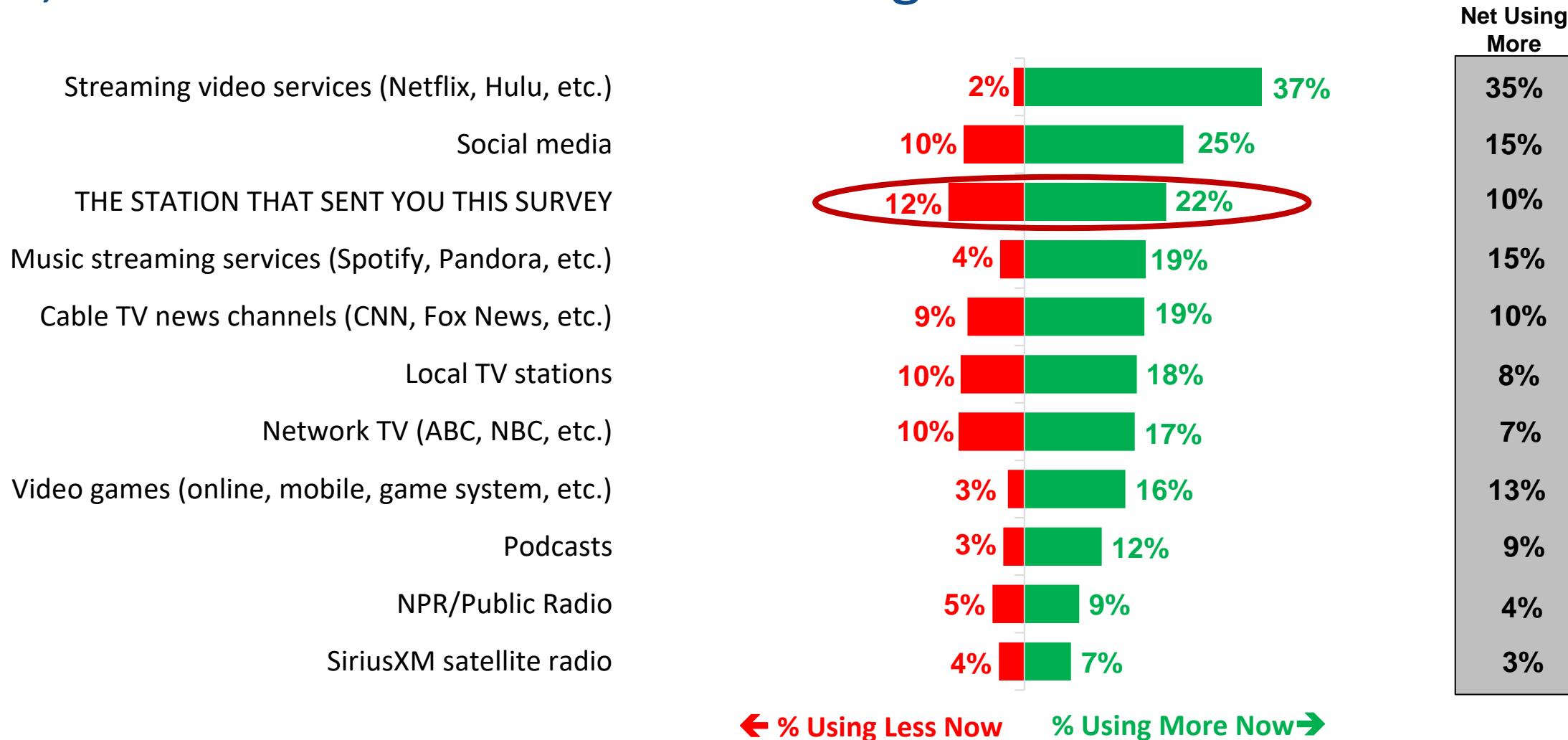
"At this moment in time, which of the following best describes you and your activities?"



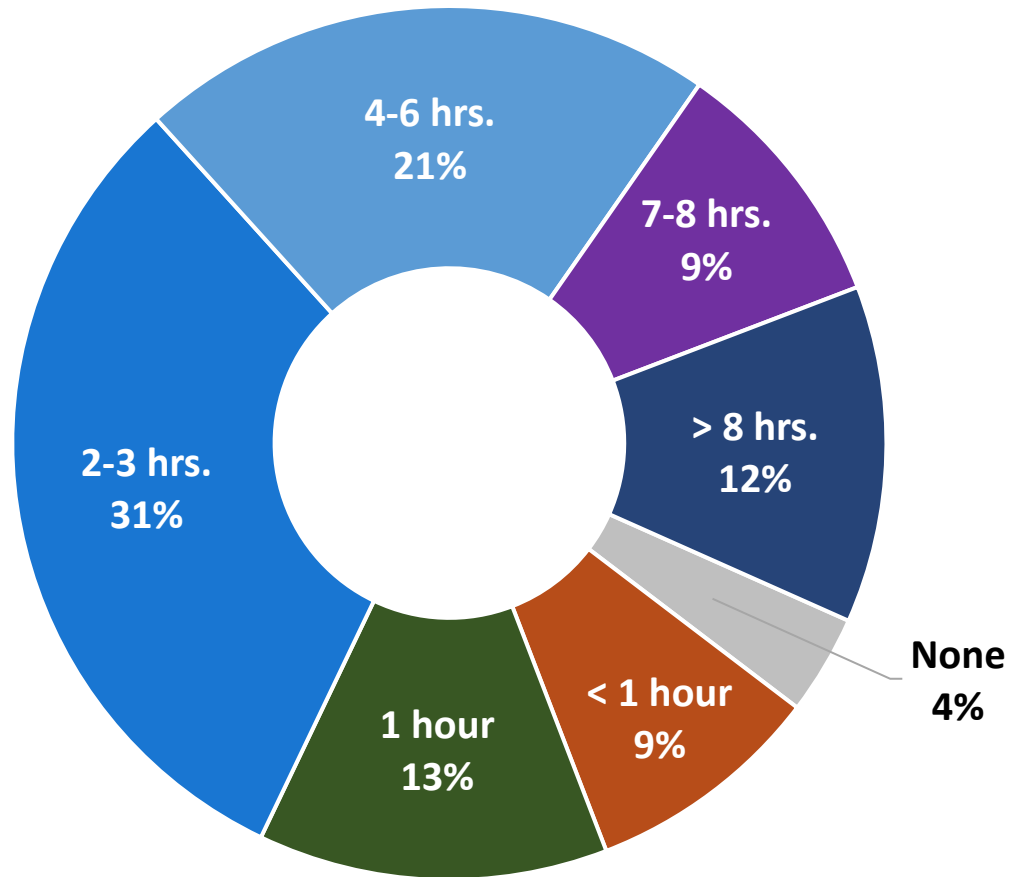


Since COVID, radio listening among its biggest fans appears to be down (but it was heading that way pre-pandemic)

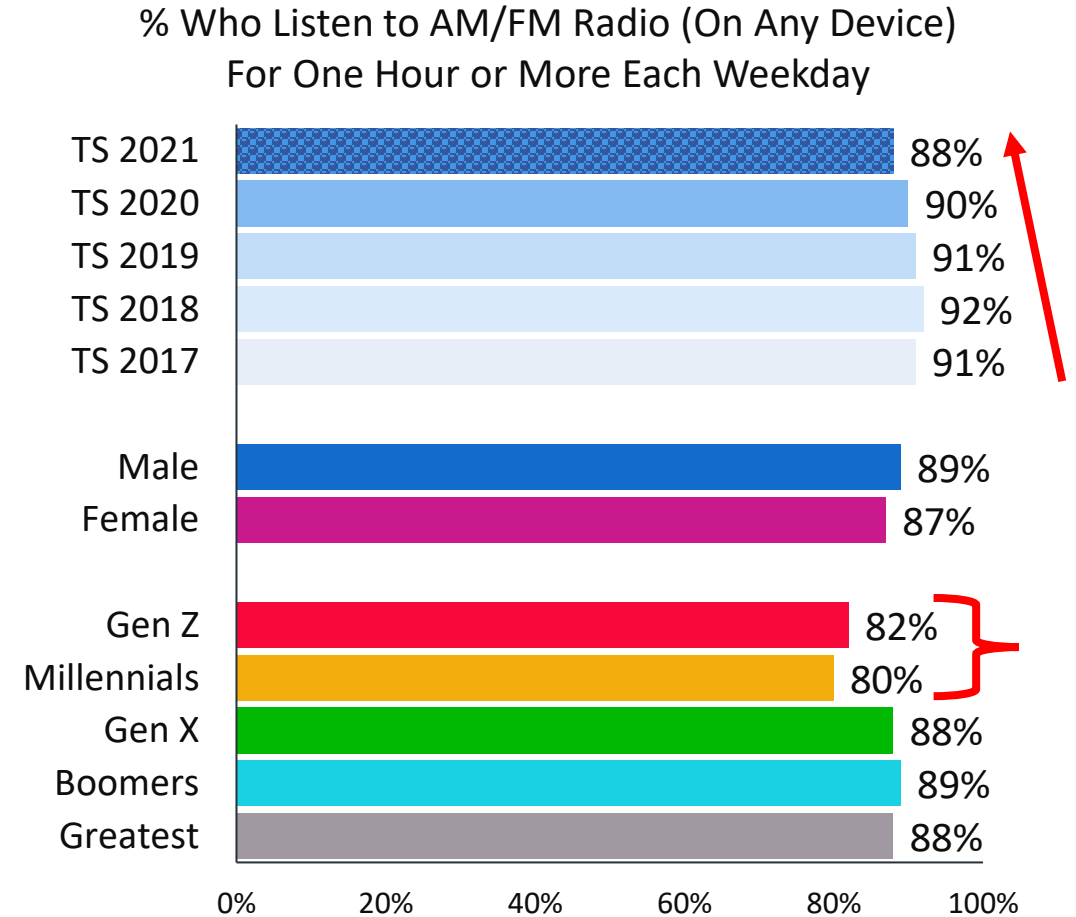
P1 Station Listening Is Up Since COVID; Streaming Video, Internet Use, Social Media & Music Streaming Show Solid Gains



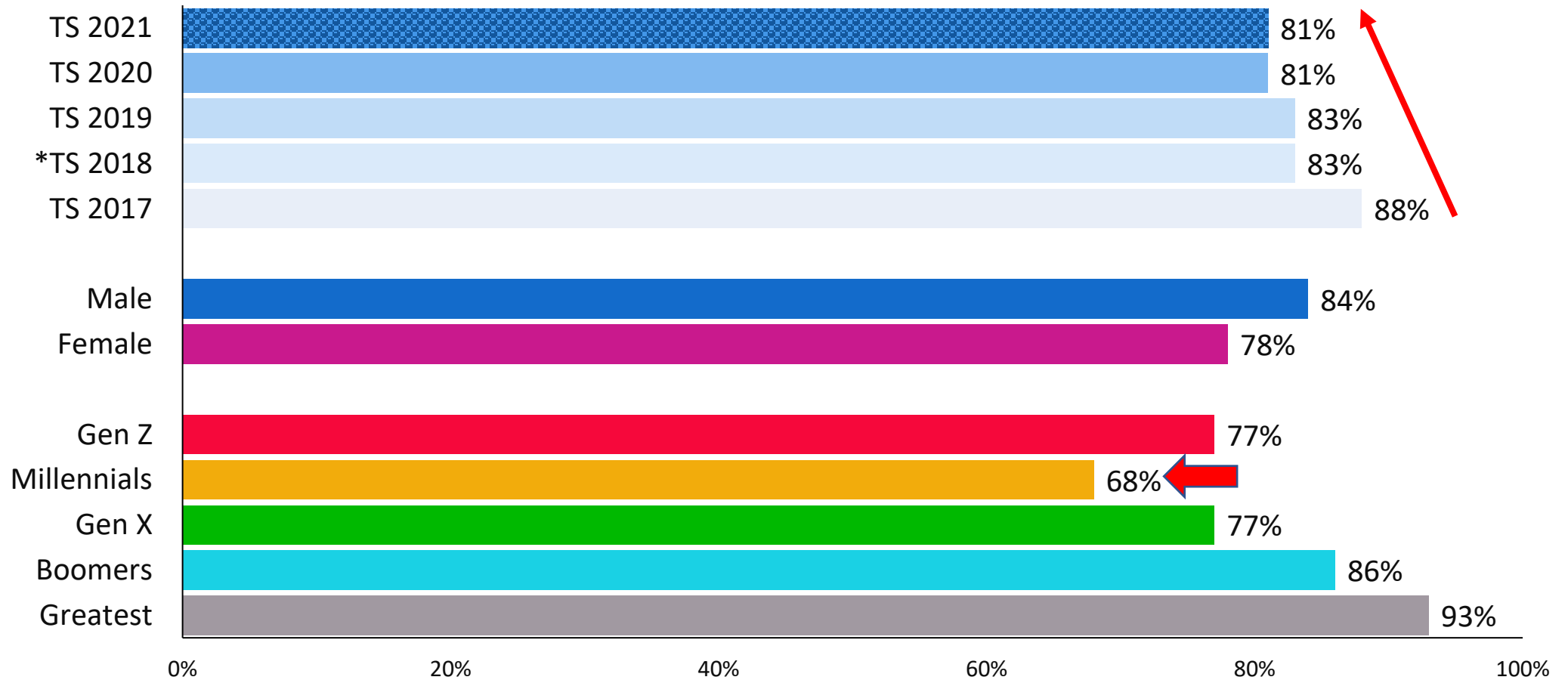
AM/FM Radio Listening Is Gradually Trending Down, Lowest Among the Youngest Generations



"How many hours on an average WEEKDAY (Monday-Friday) do you use/listen to any local AM/FM radio stations (using a regular radio OR audio stream on any device)?"

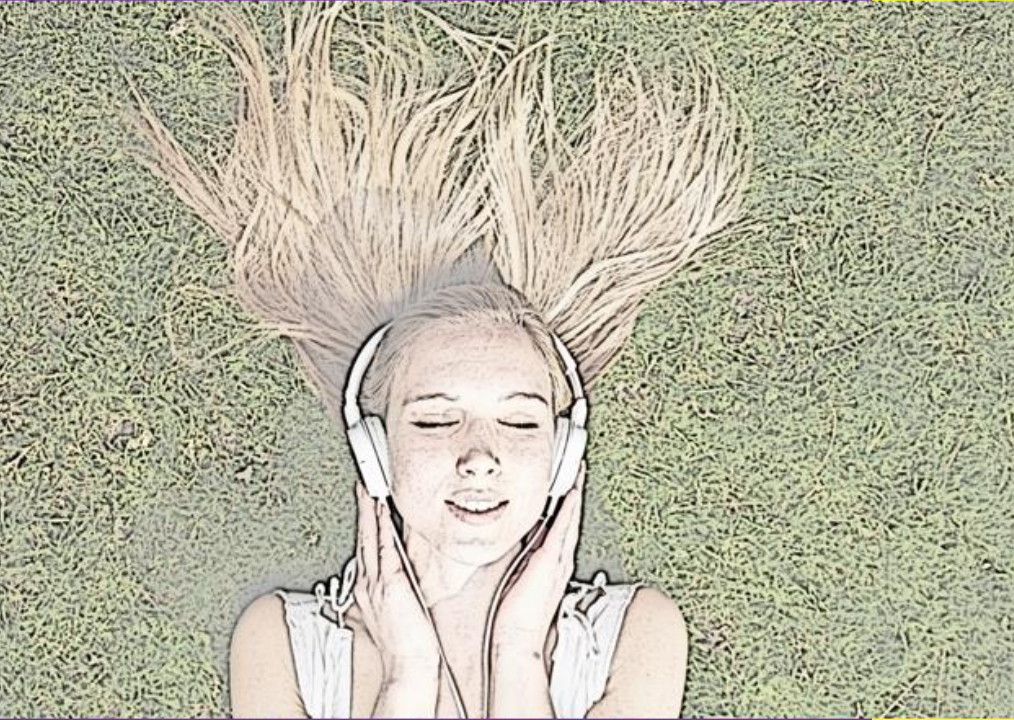


Only Eight in Ten Have a Regular Radio Where They Live (and They Use), Much Less So For Millennials



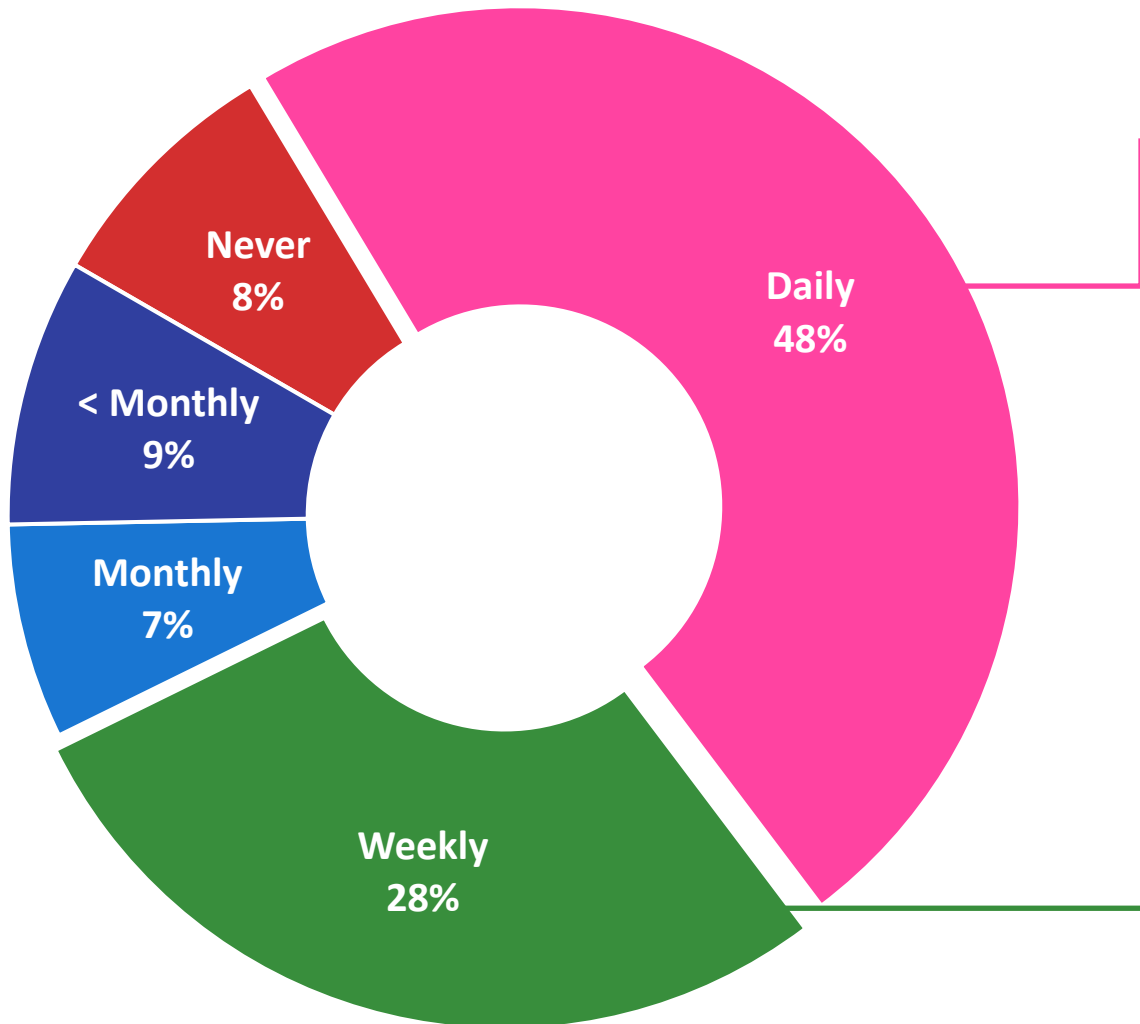
% with a regular radio in working condition where they live that they use*

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

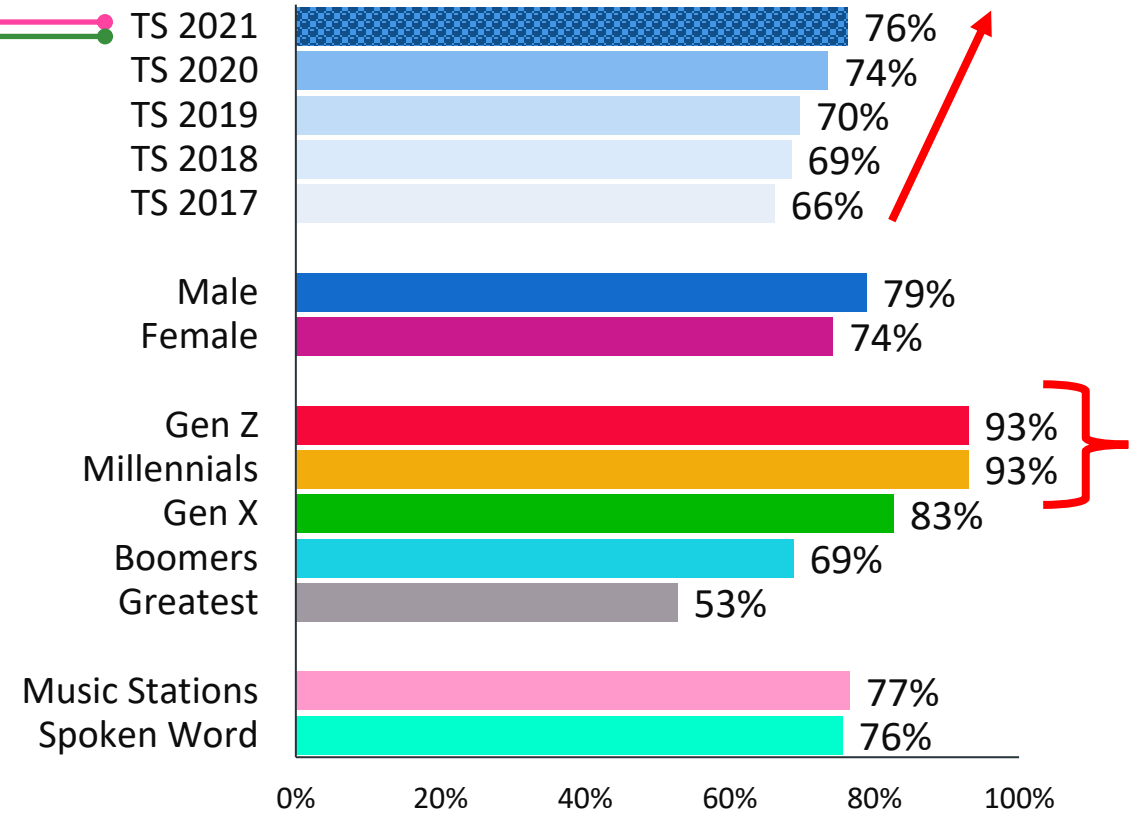


**Audio & video
streaming reach
new levels**

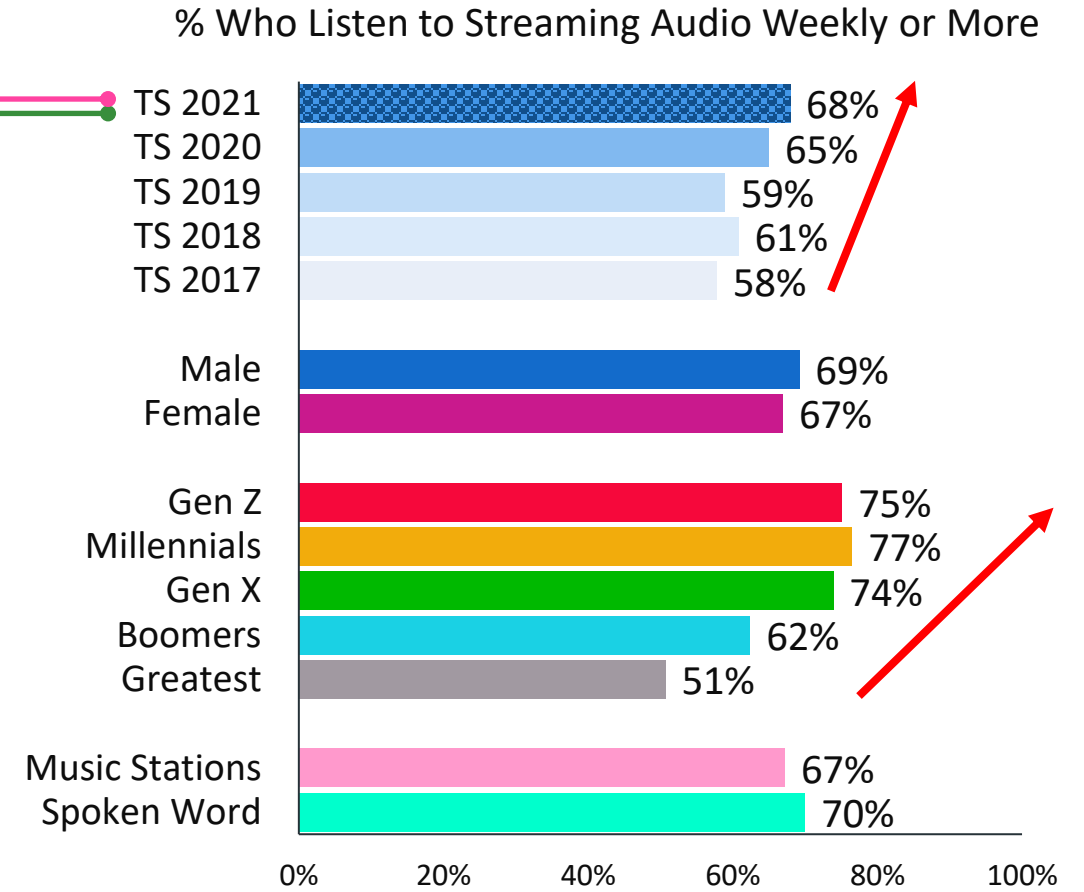
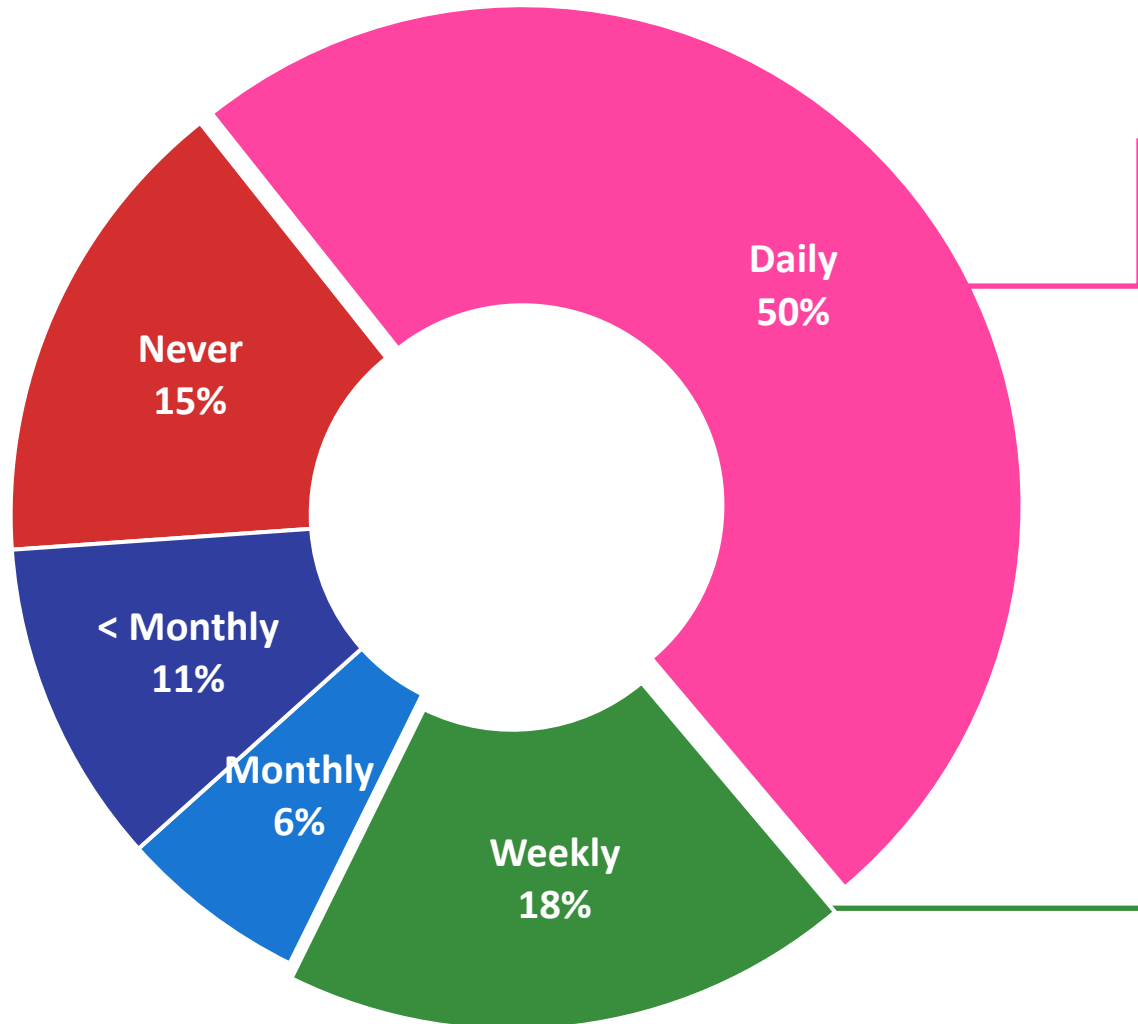
Almost Half Watch Streaming Video Daily; Weekly Usage Grows to More Than Three in Four



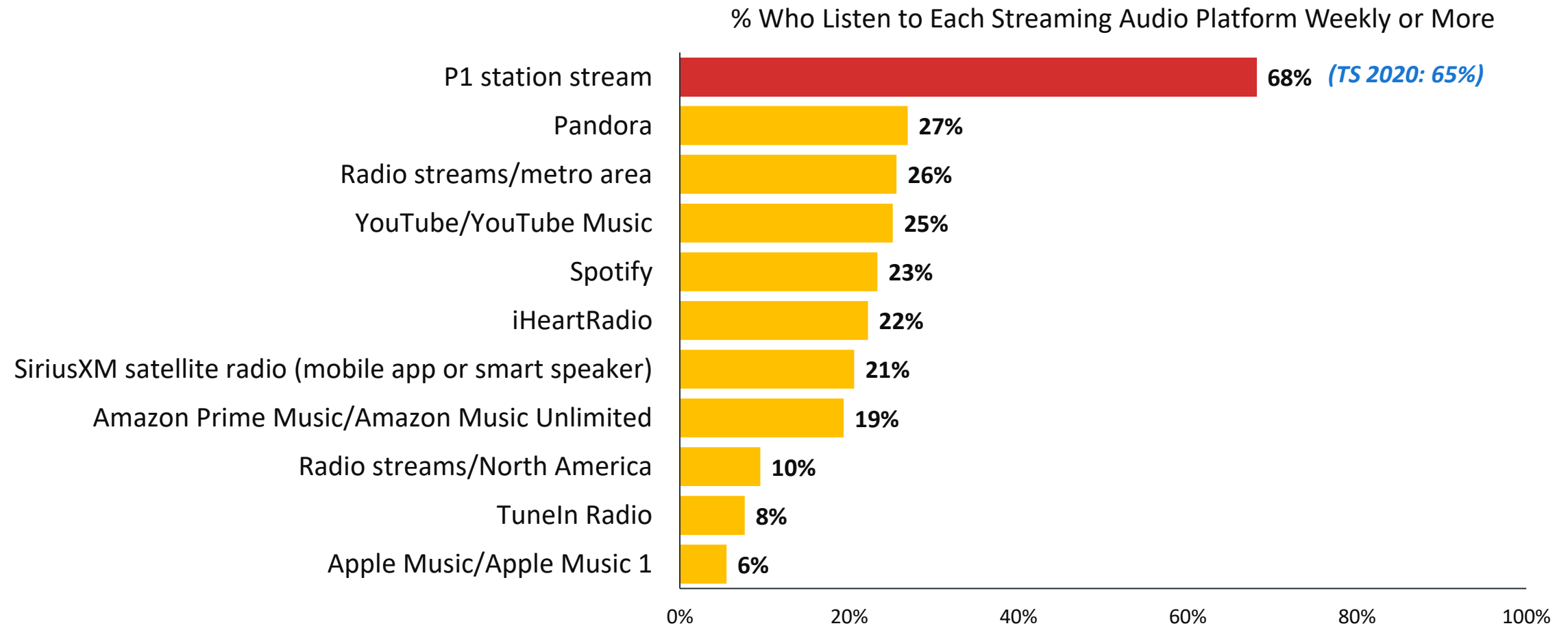
% Who Watch Streaming Video Weekly or More



Half Listen to Streaming Audio Daily; Weekly Usage Continues Its Growth, Skewing Young



Two-Thirds Listen to their P1 Station's Stream, Far Ahead of Pandora, Other Station Streams, YouTube, and Spotify



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

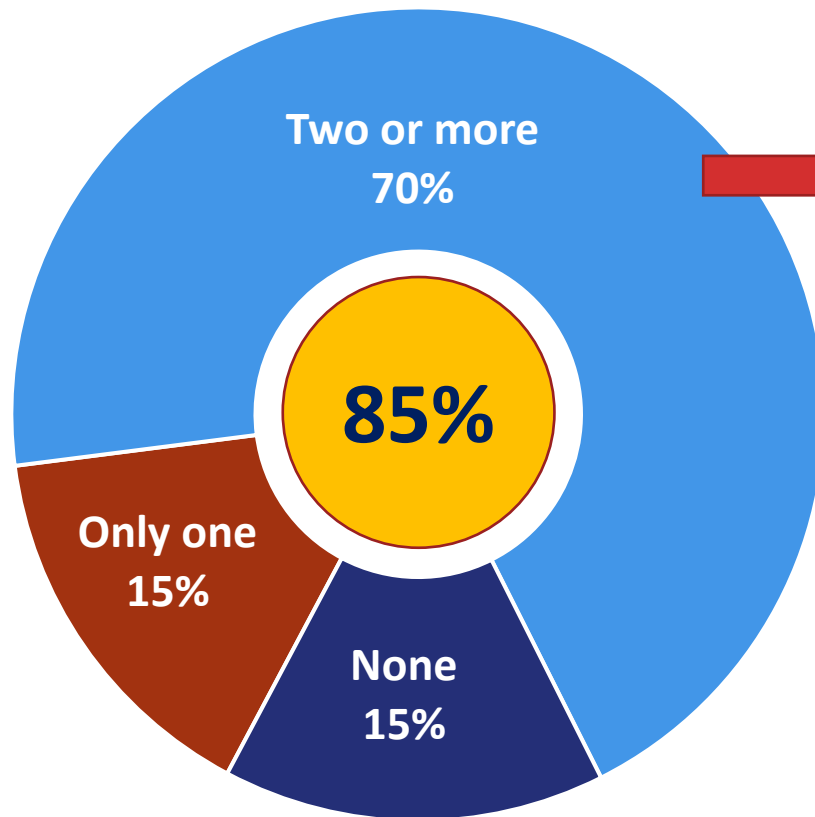


Paid
Content

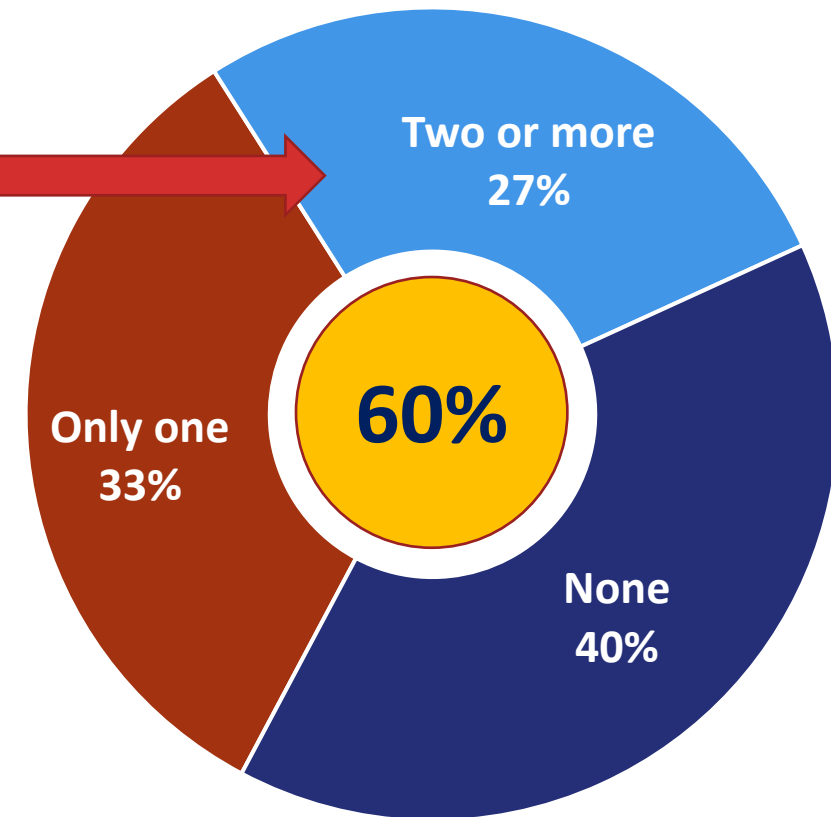
Increasingly,
consumers
are paying for
audio/video
content

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

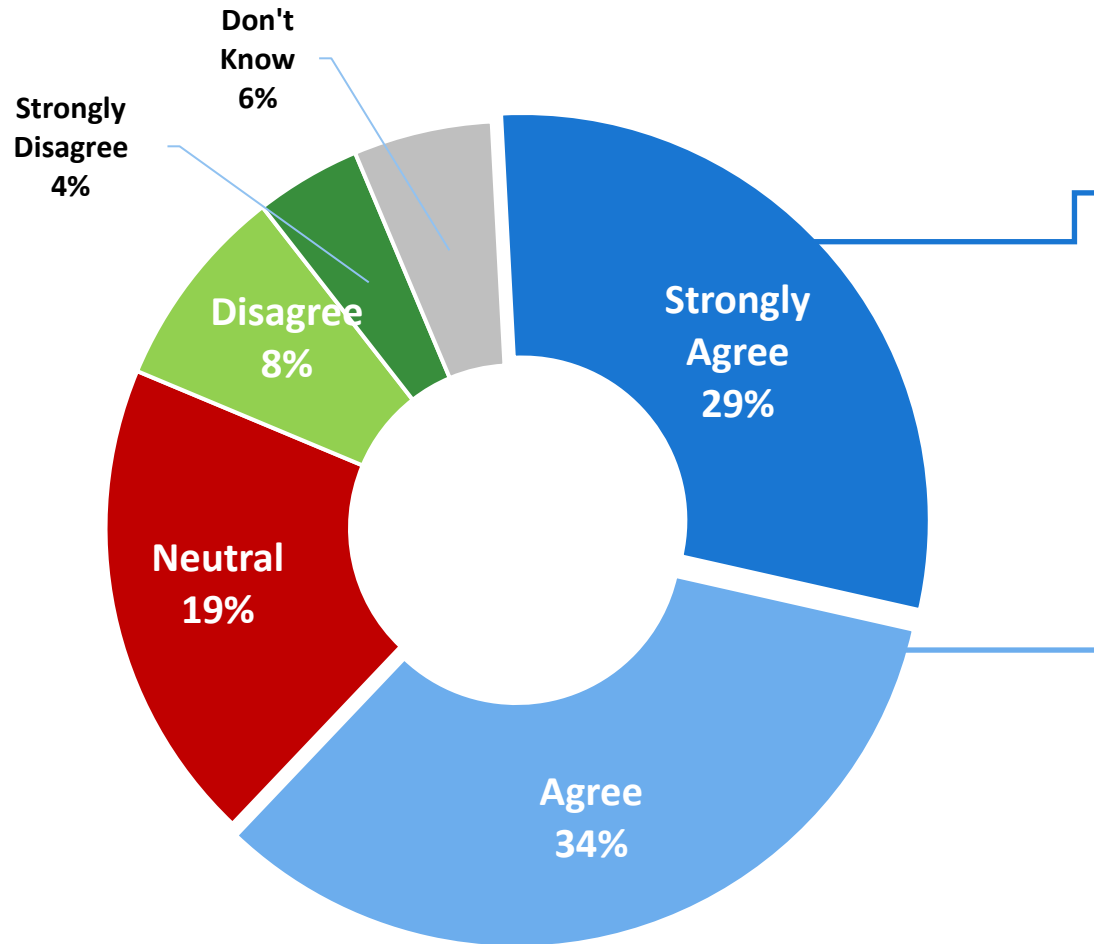
Paid **VIDEO** Streaming Subscriptions



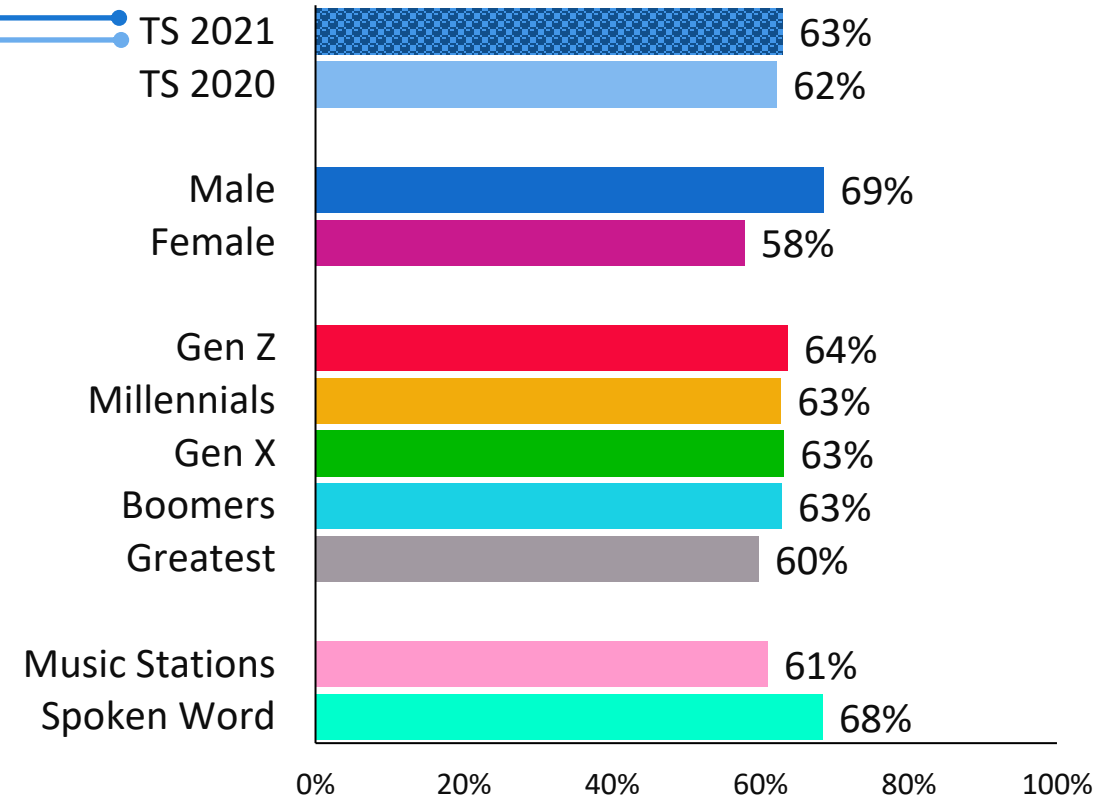
Paid **AUDIO** Streaming Subscriptions



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



% Agreement (Strongly Agree + Agree)

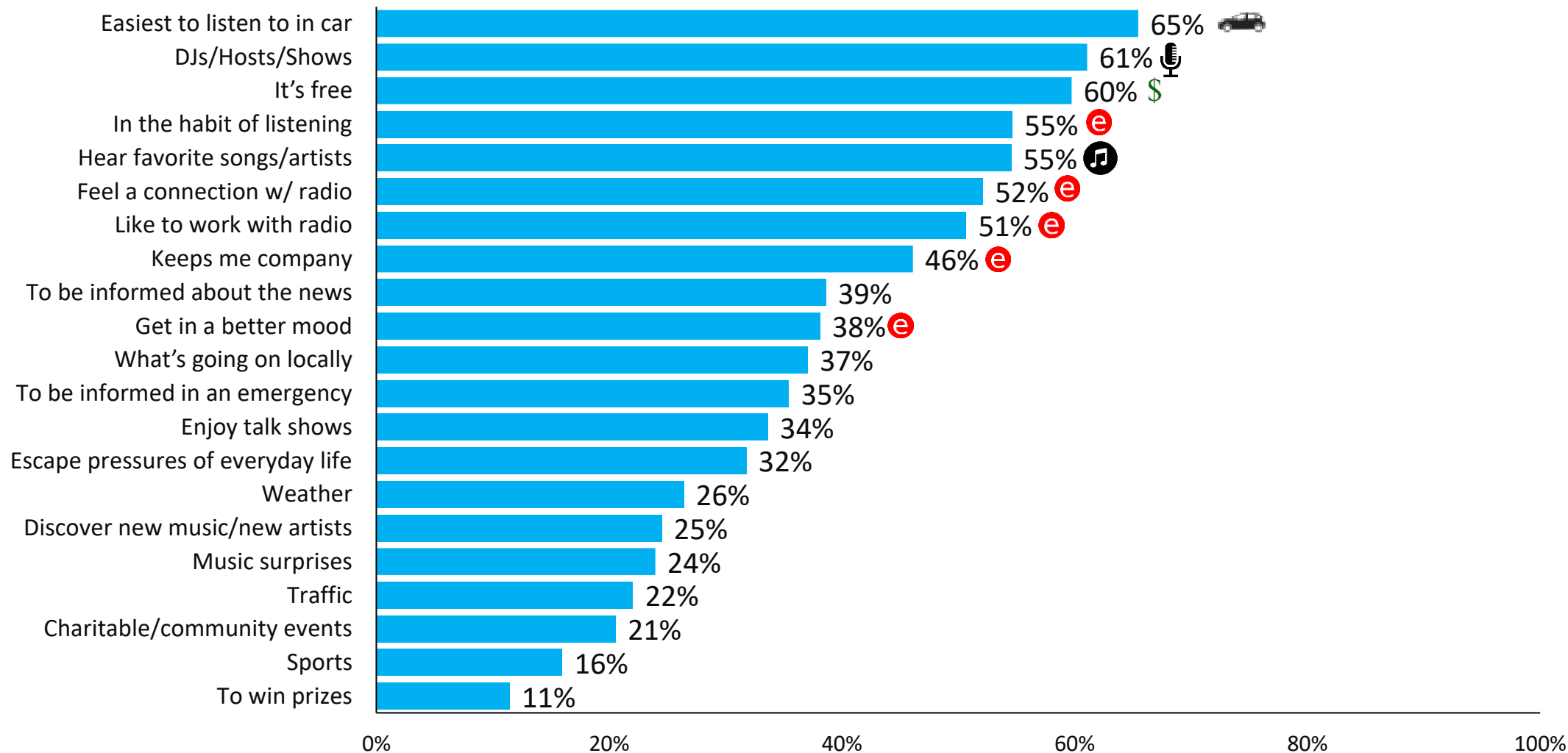


"I am concerned about the growing number of subscription fees I'm paying for media content"



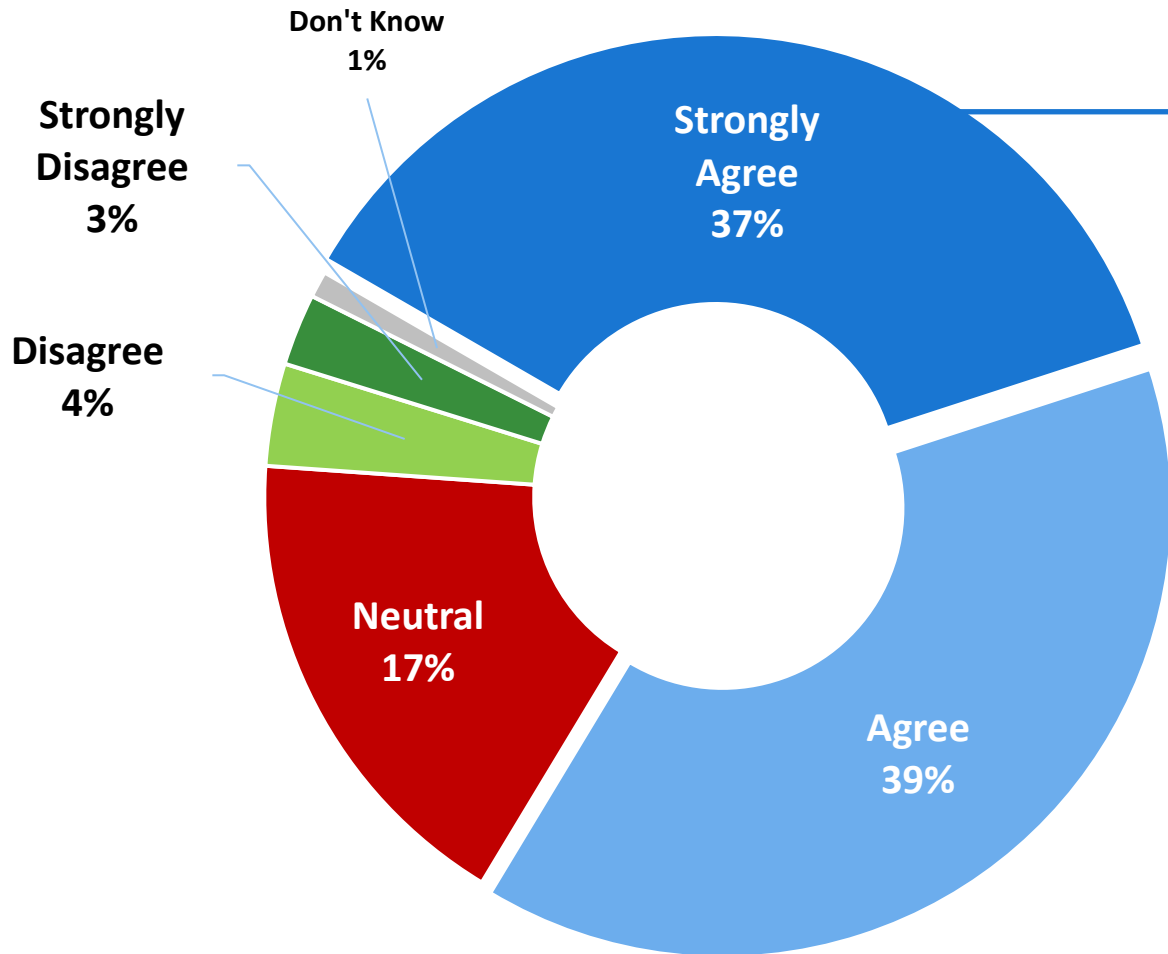
Since COVID, radio's appeal is more emotionally driven, local, & P1 focused

Why AM/FM Radio?

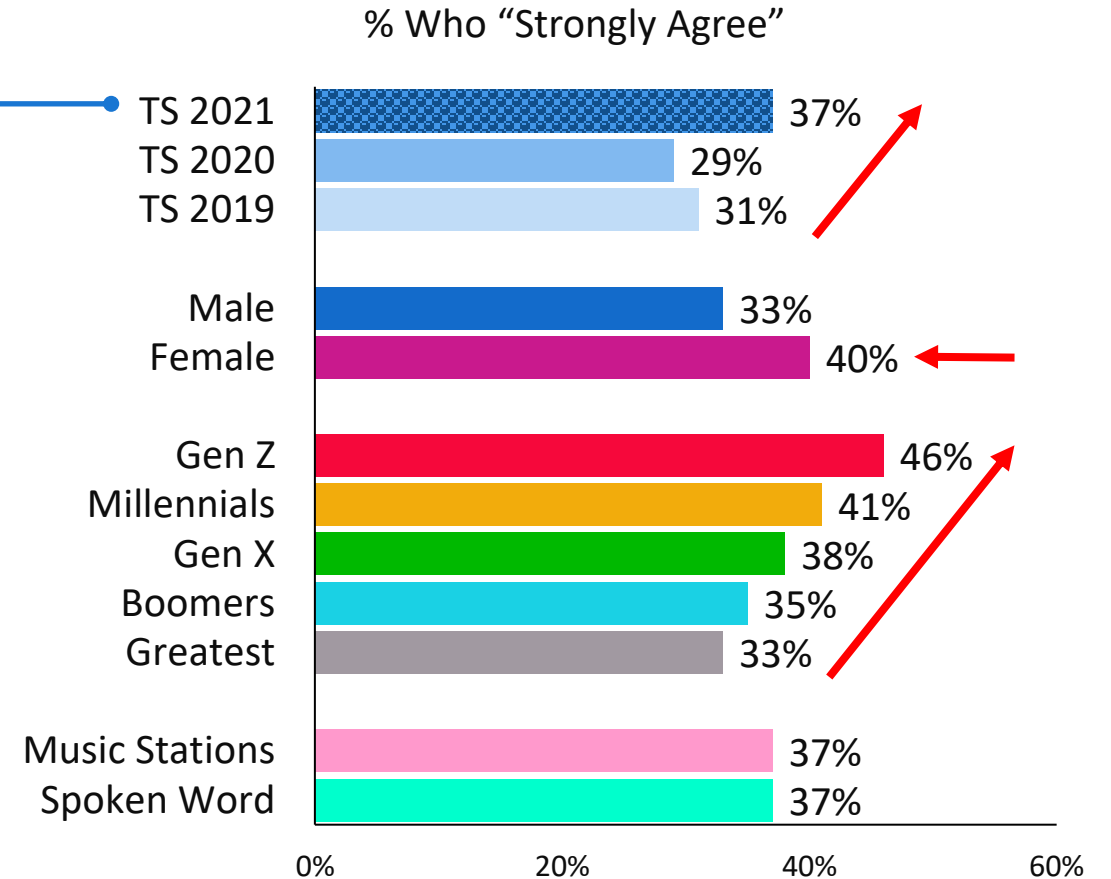


Among those who listen to AM/FM radio, % who say this is a main reason they listen

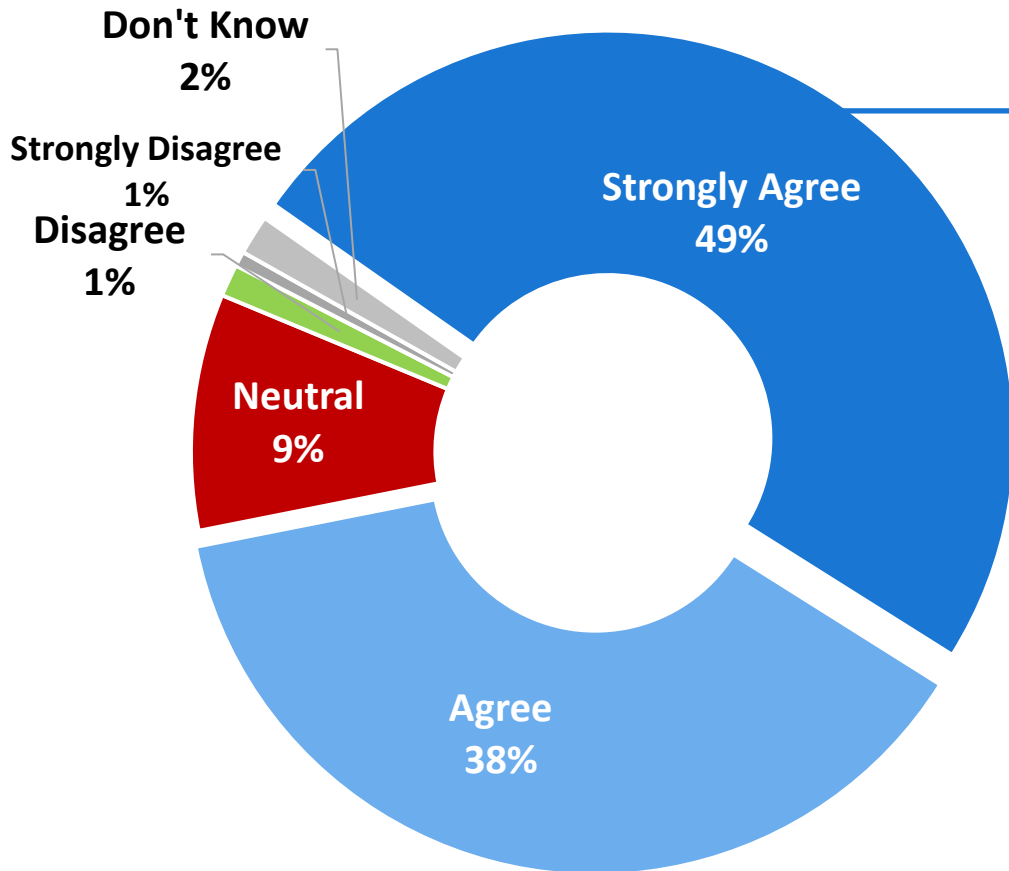
Especially During COVID, Respondents Feel a Connection to Their P1 Station



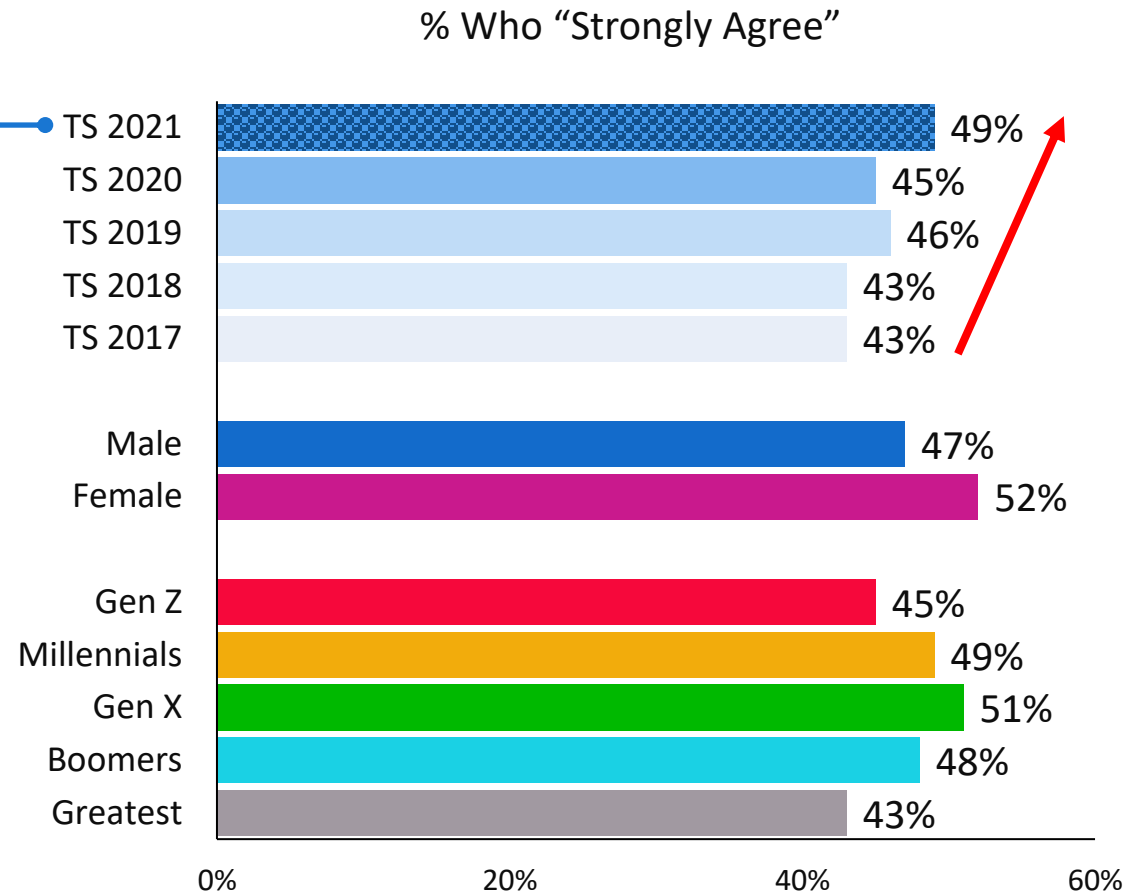
*"I really feel a sense of connection to
THE STATION THAT SENT ME THIS SURVEY"*



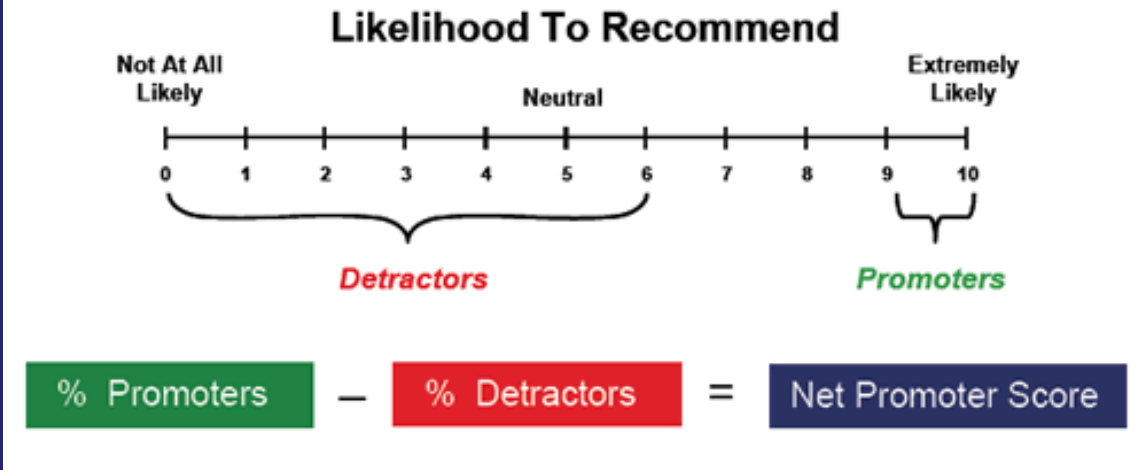
A Near Majority Strongly Agrees Its Local Orientation Is a Primary Advantage For Broadcast Radio



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

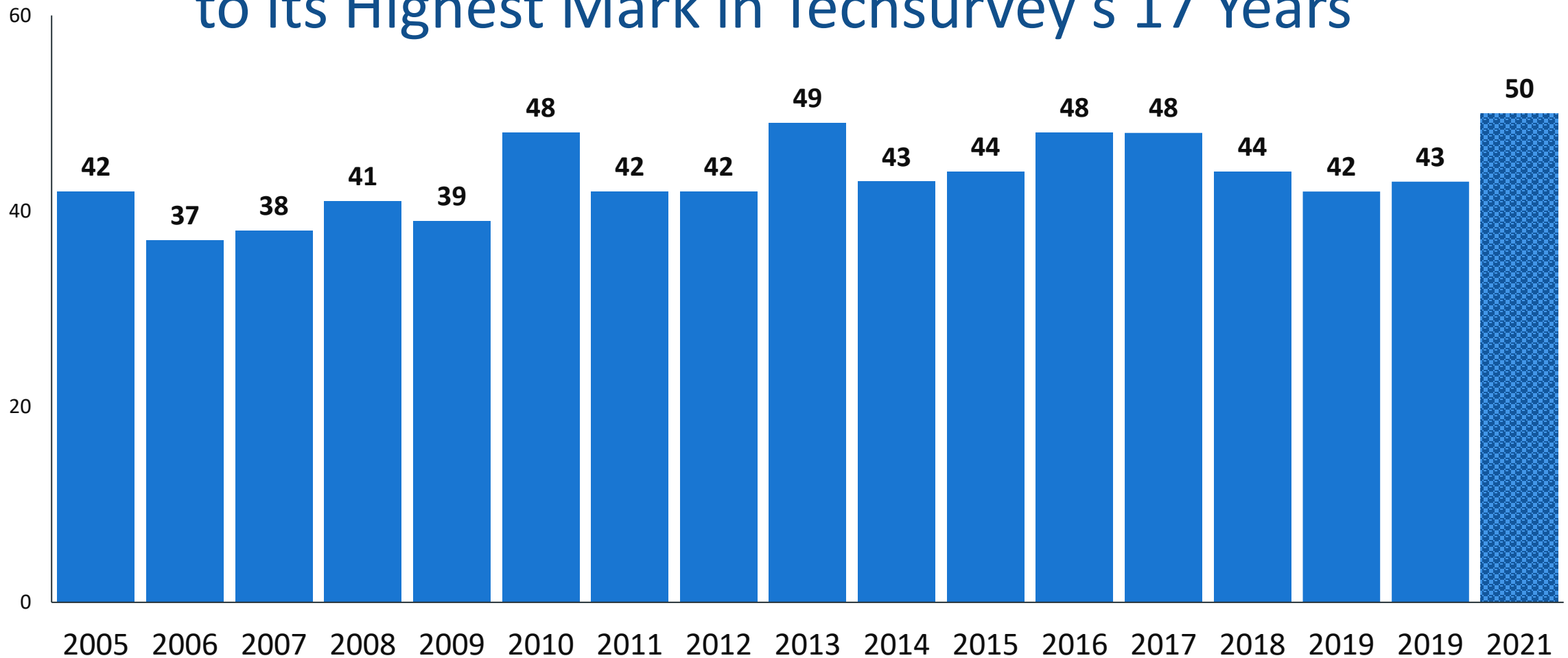


NET PROMOTER

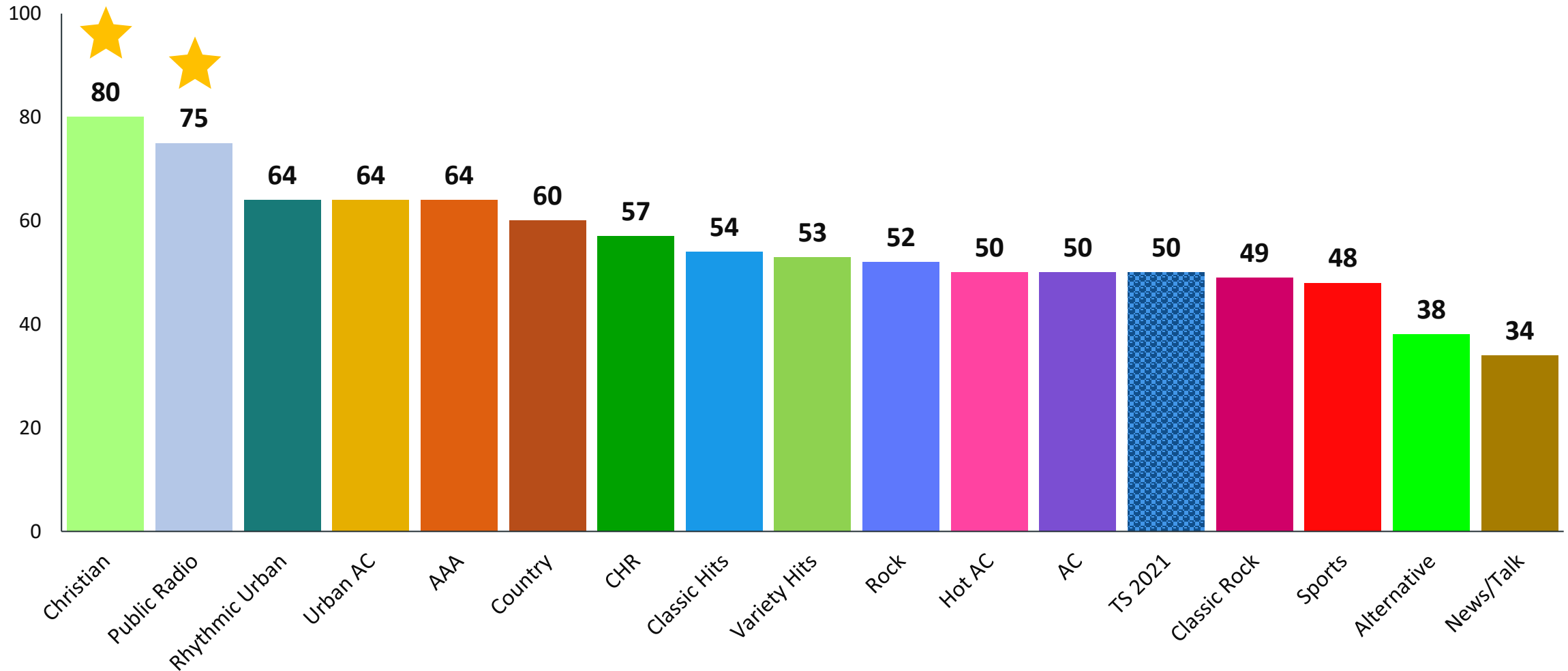


Radio's word-of-mouth scores (Net Promoter) have never been stronger

Commercial Radio's NPS Jumps Year-Over-Year to its Highest Mark in Techsurvey's 17 Years



Christian & Public Radio Lead NPS, While Rhythmic Urban and Urban AC Are the Top Commercial Radio Formats

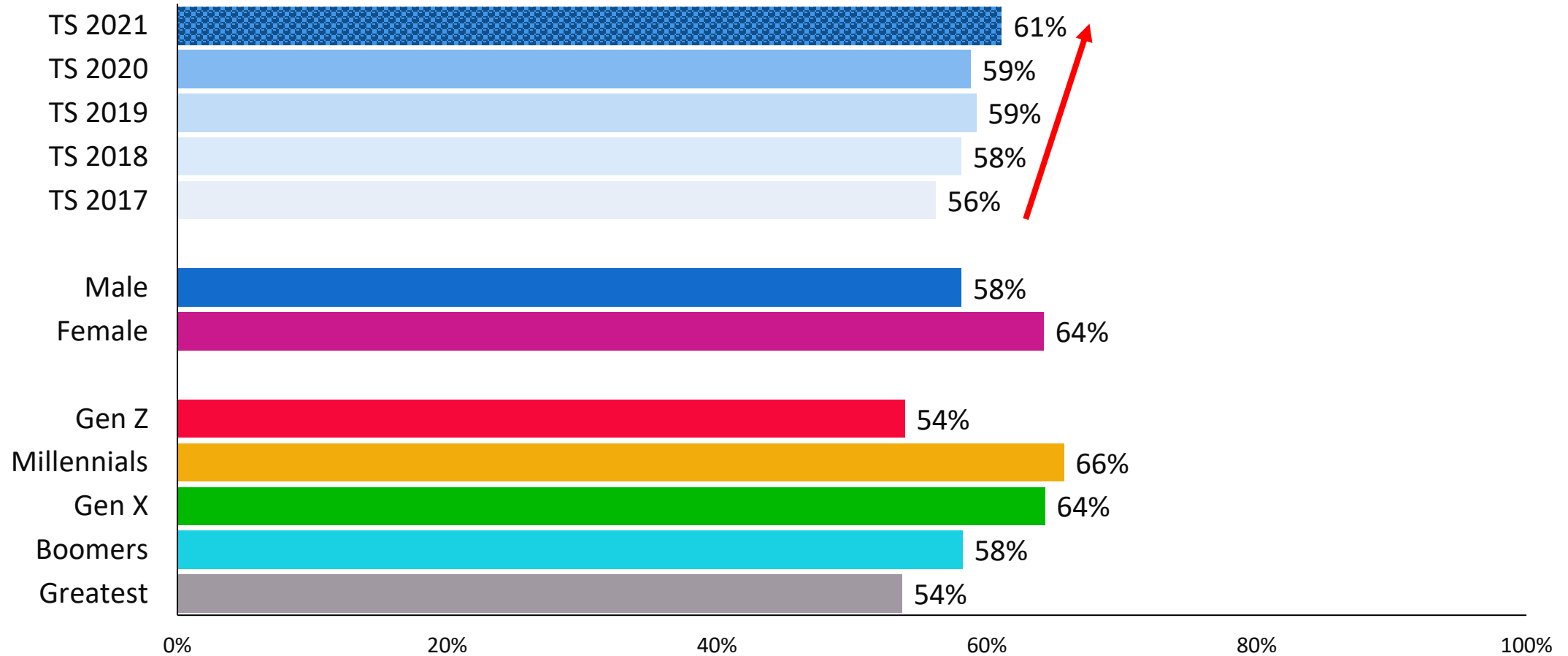




**The appeal of
radio's hosts is
beginning to
overshadow its
music**

Six in Ten Say Personalities Are a Main Reason They Listen to Broadcast Radio

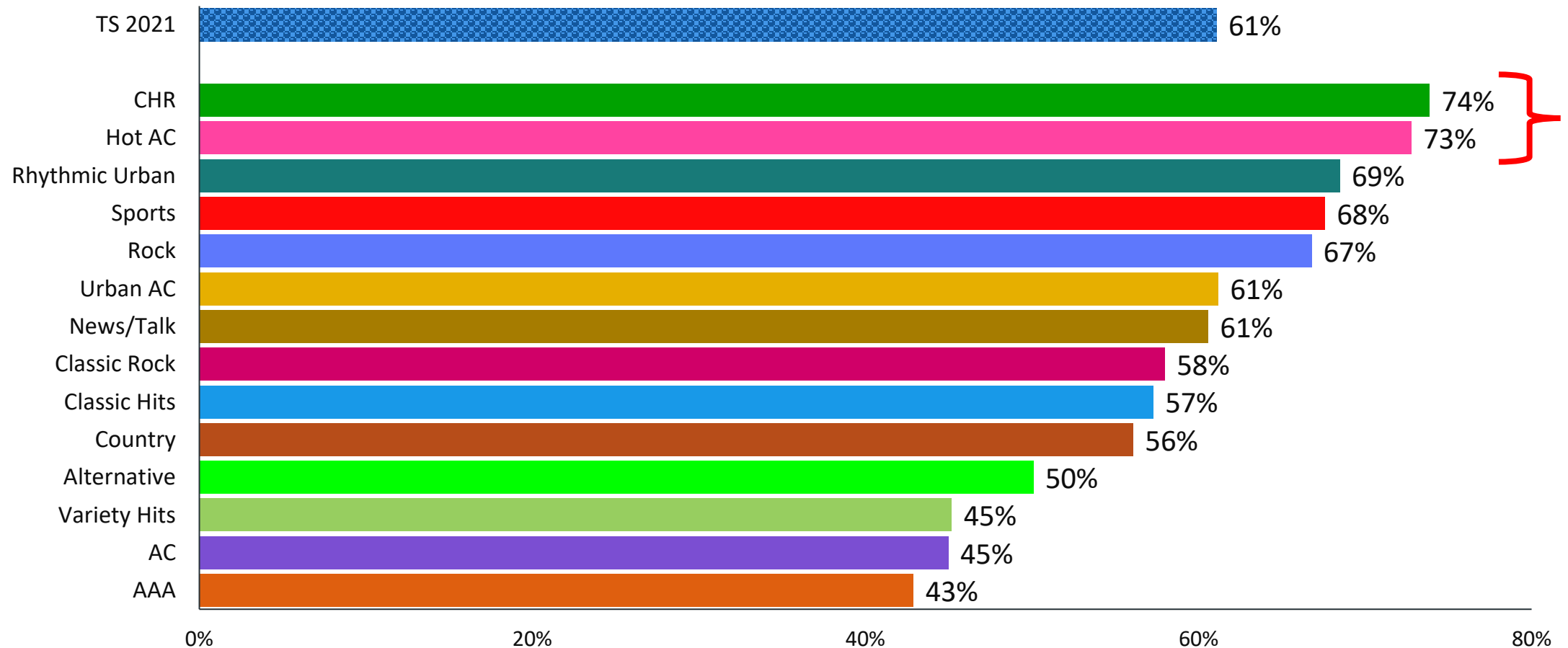
"I Like Particular DJs, Shows, or Hosts"



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

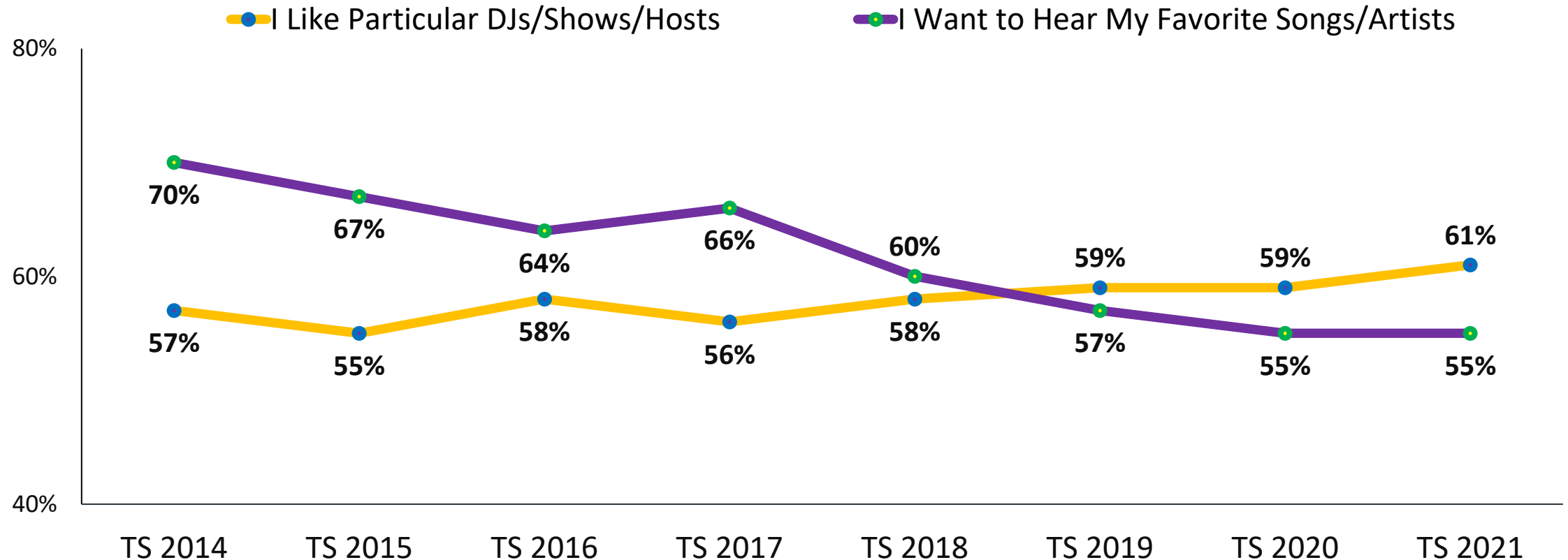
CHR & Hot AC Fans Value Personalities on Radio the Most

"I Like Particular DJs, Shows, or Hosts"



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

Over Time, the Appeal of Music on the Radio Is Becoming Secondary to the Popularity of its Personalities



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



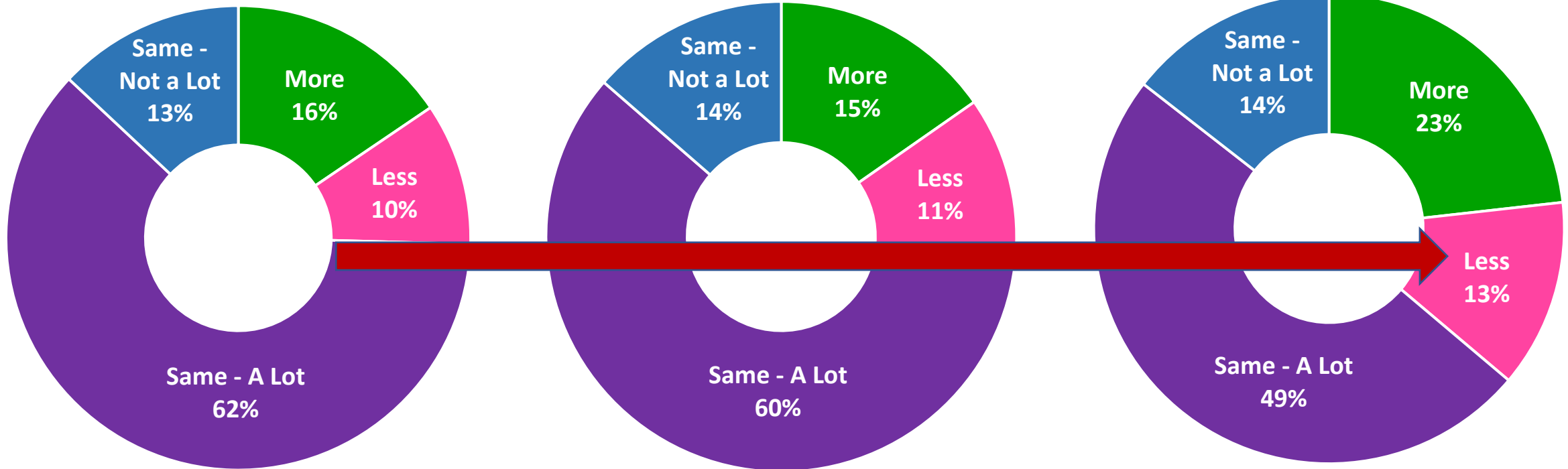
**Why less
radio
listening?
More time at
home, less
time in cars**

AM/FM Radio Listening Momentum in the Past Year

TS 2019

TS 2020

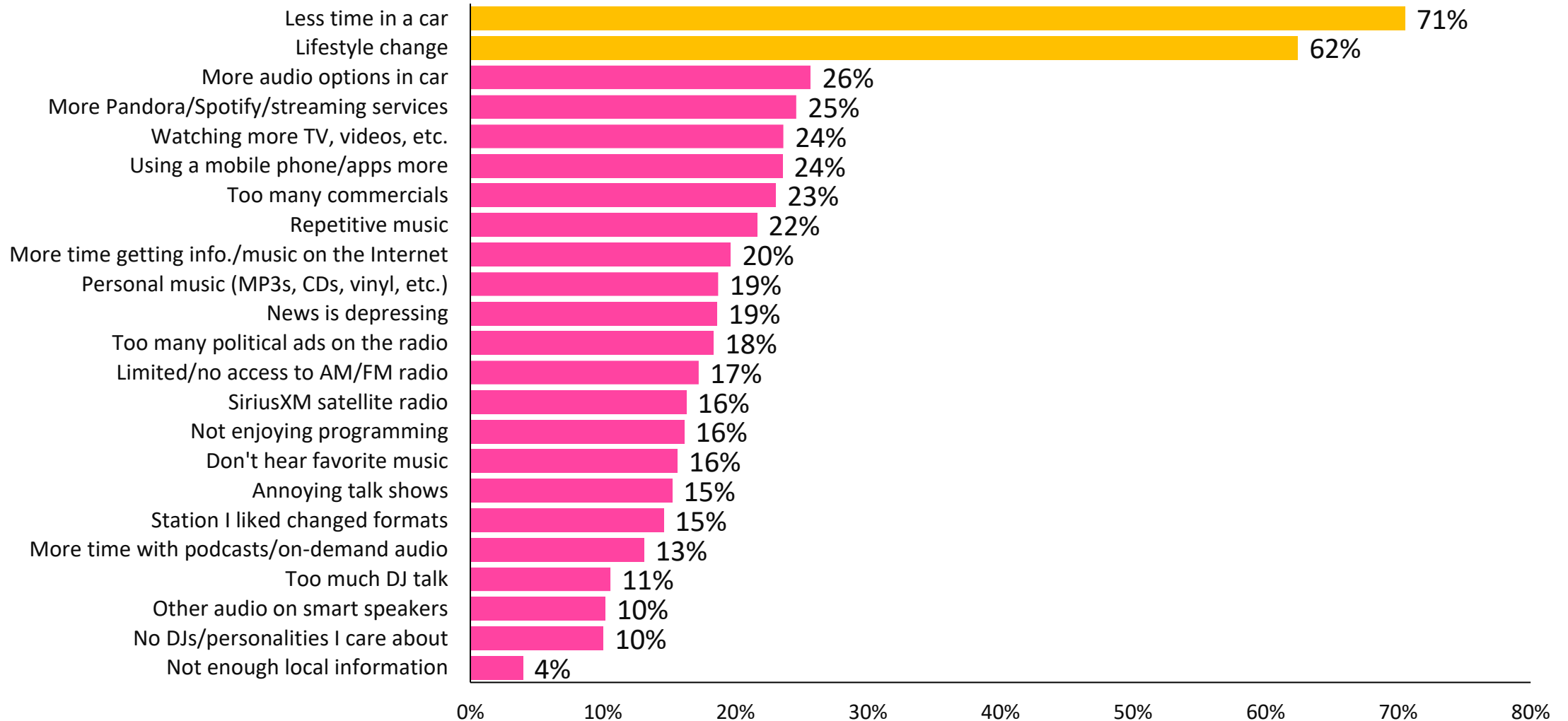
TS 2021



Among those who listen to AM/FM radio

Why Listening Less to AM/FM Radio?

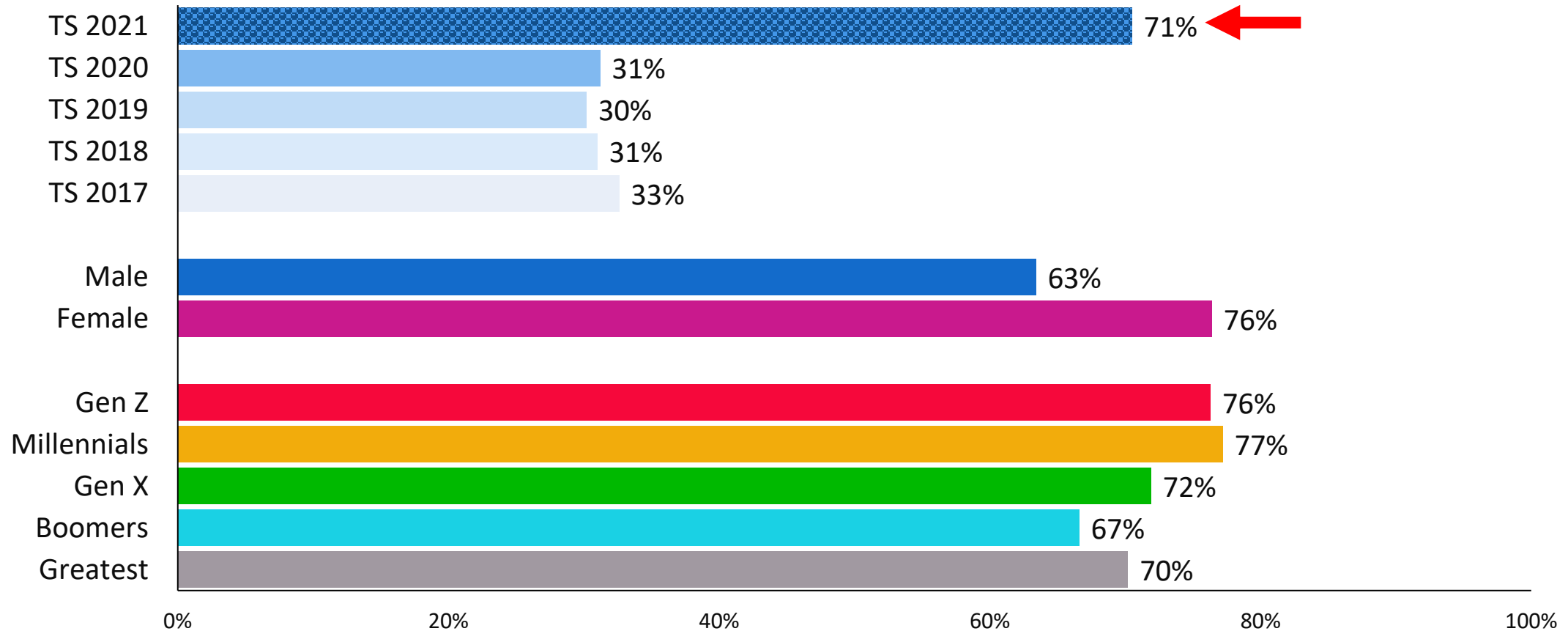
Less Time in a Car and Lifestyle Changes Since COVID



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

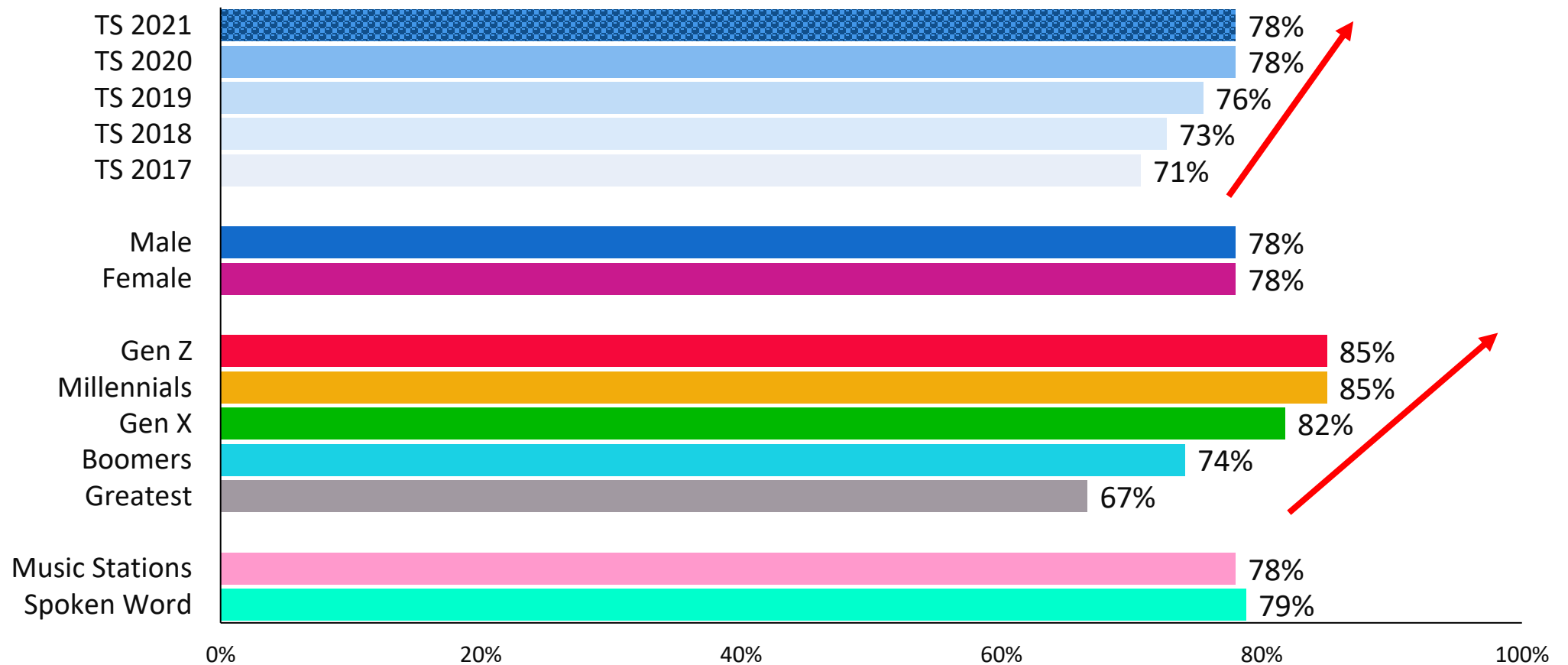
Seven in Ten Who Are Listening Less to Radio Say Decreased Time in a Car Is a Main Reason – More Than Double Last Year's Level

"Spending Less Time in a Car"



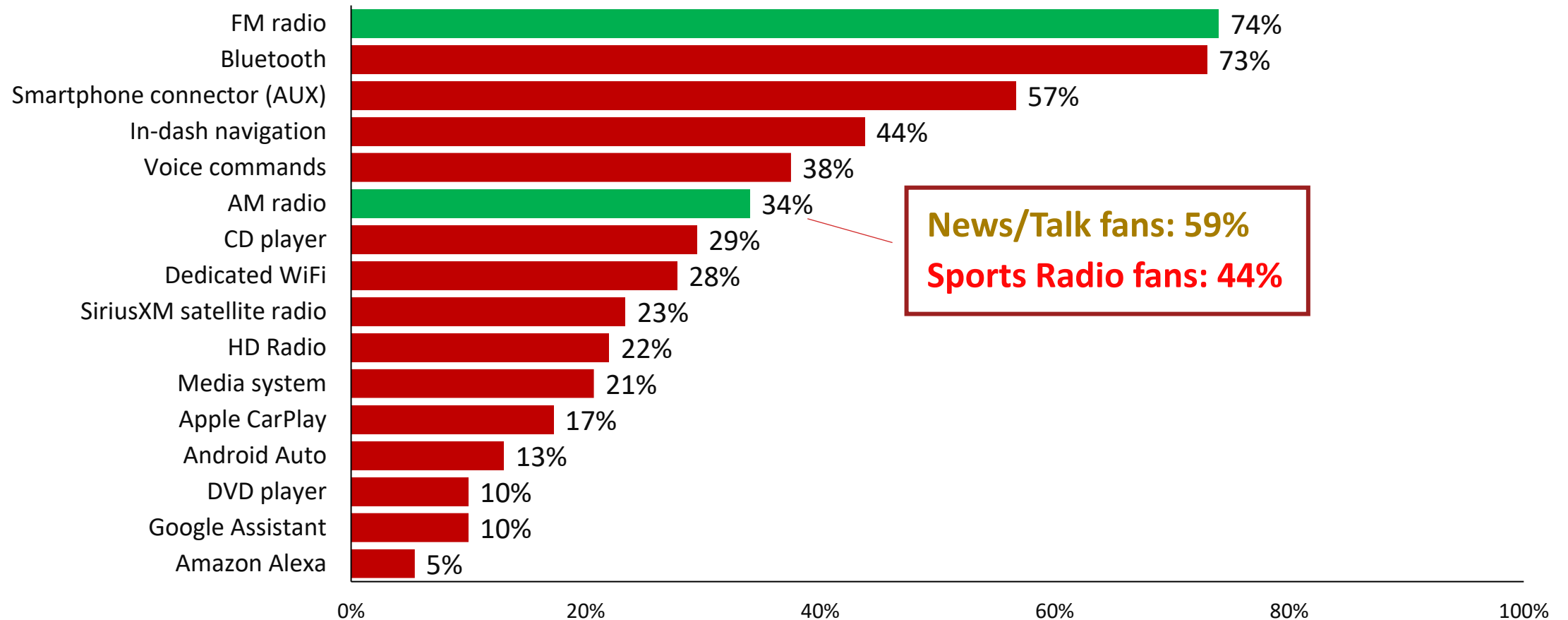
Among those who say they are listening less to AM/FM radio in the past year, % who say this is a main reason they listen less

Nearly Eight in Ten Can Now 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

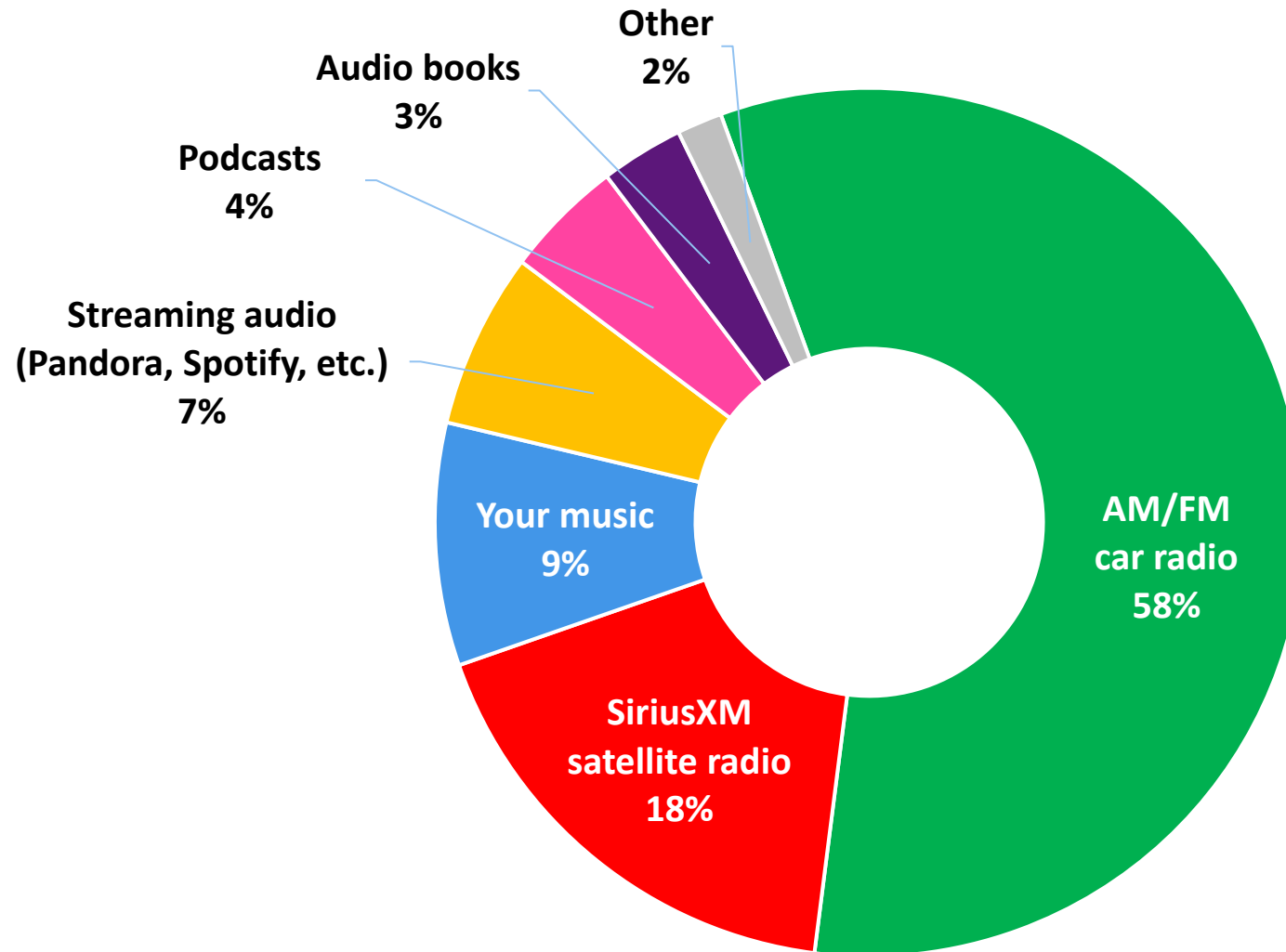
Of Those Buying or Leasing a New Car in 2021, FM Radio and Bluetooth Are the Most Important Features



“Very Important” features among those planning on
buying/leasing (or already bought) a new vehicle in 2021

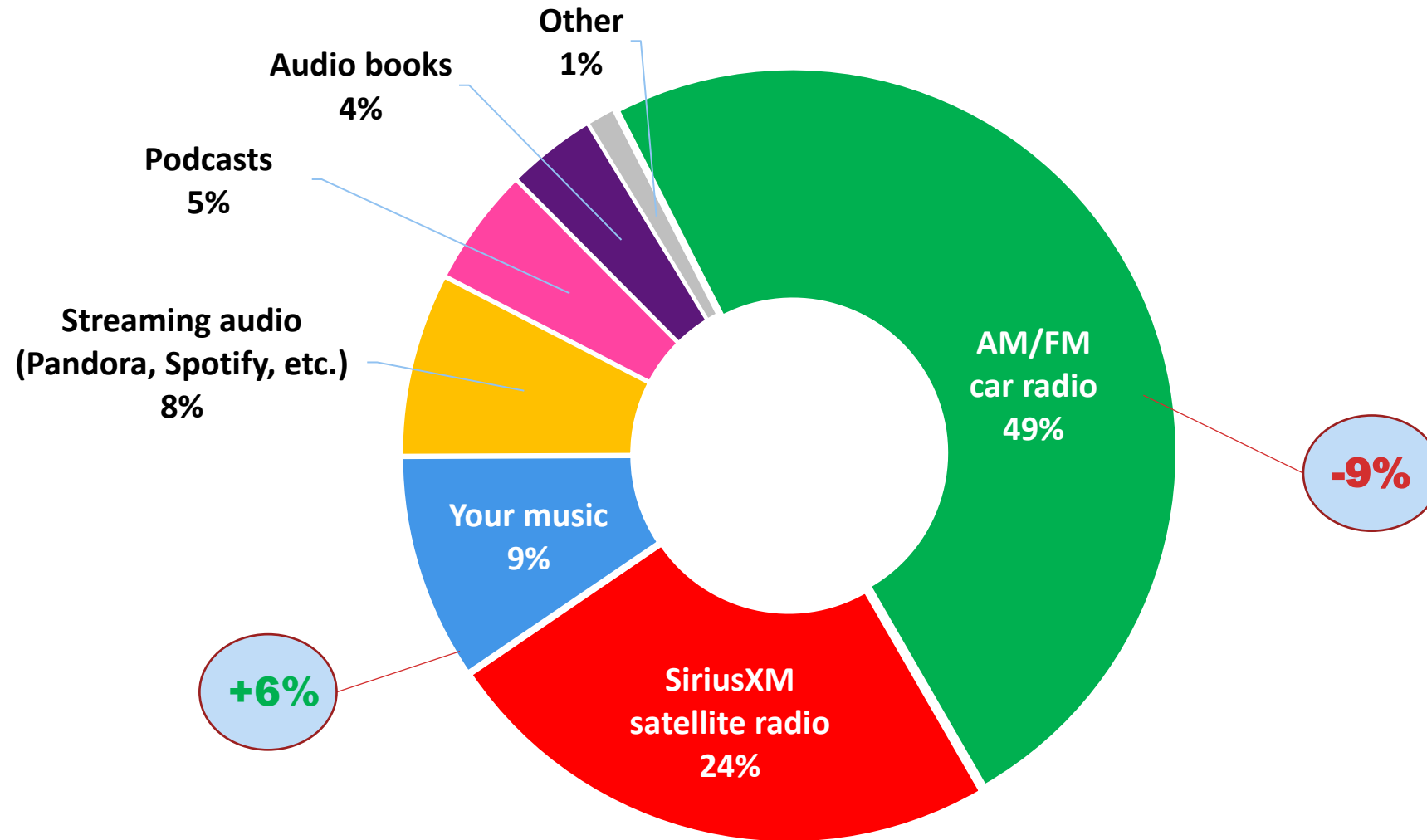
AM/FM Radio Is the Leader For In-Car Audio Usage

Total



Among Those With “Connected Cars,” AM/FM Radio Listening Falls Below 50%

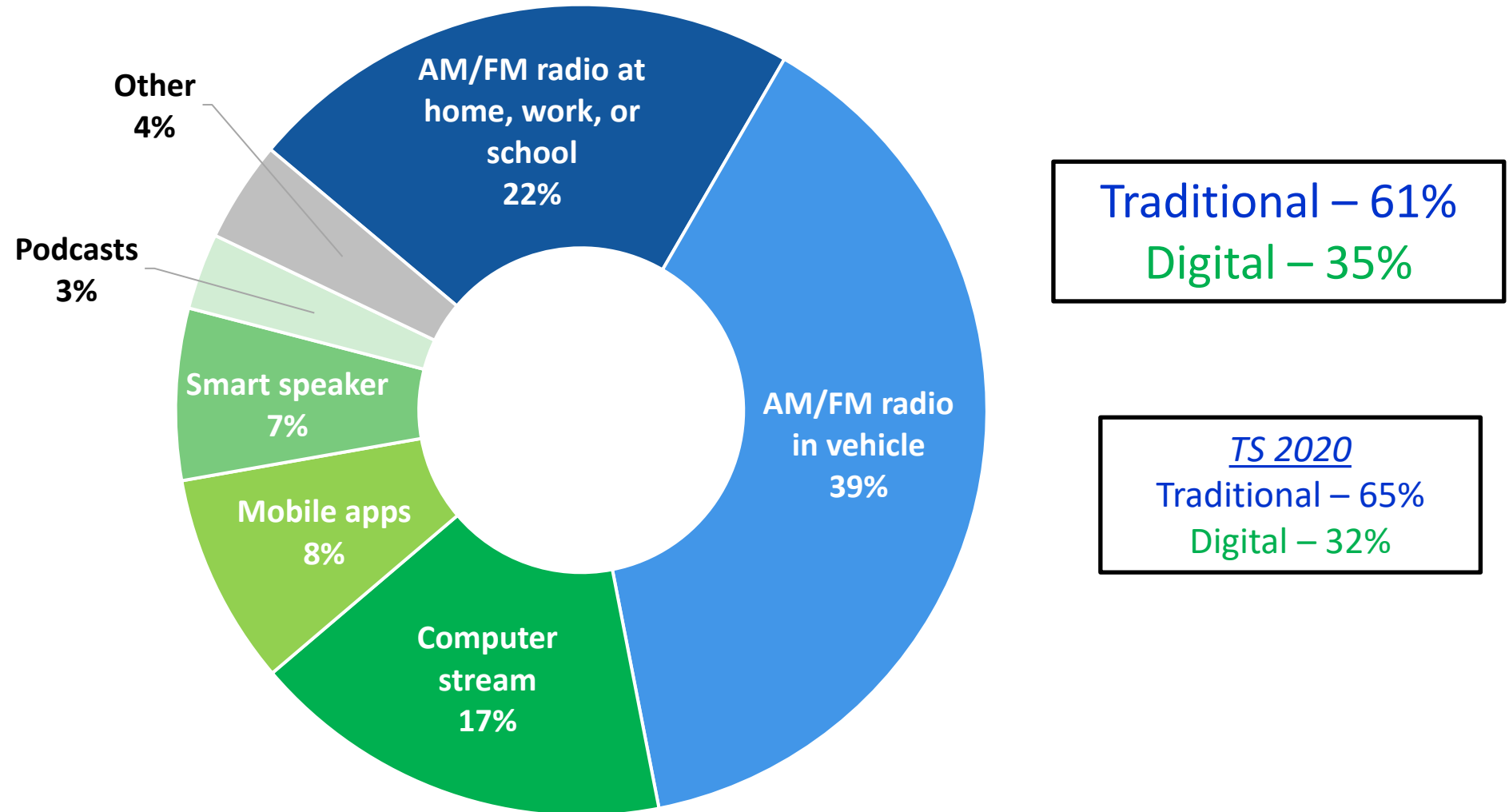
Own In-Car Media System



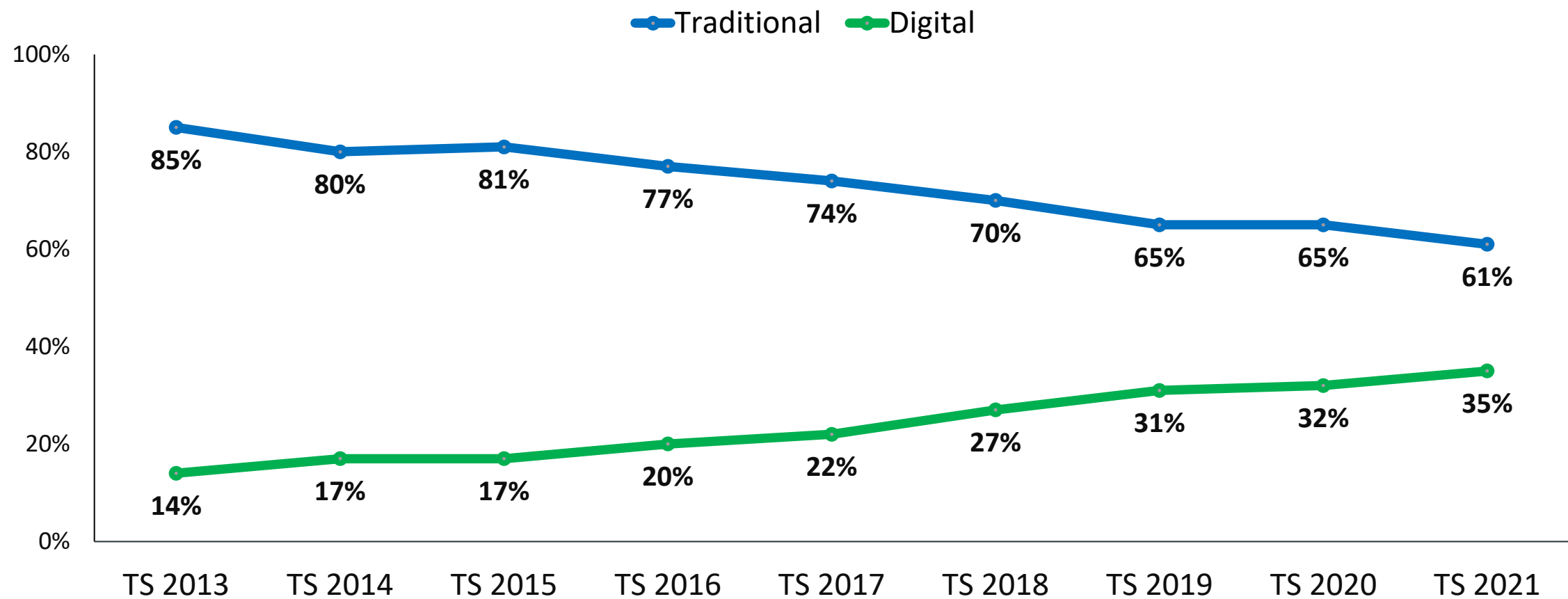


**COVID may be
accelerating the
digital usage of
radio among its
biggest fans**

How Do Radio Fans Listen to Their Favorite Stations?



P1 Station Listening Platform Trend: Traditional vs. Digital

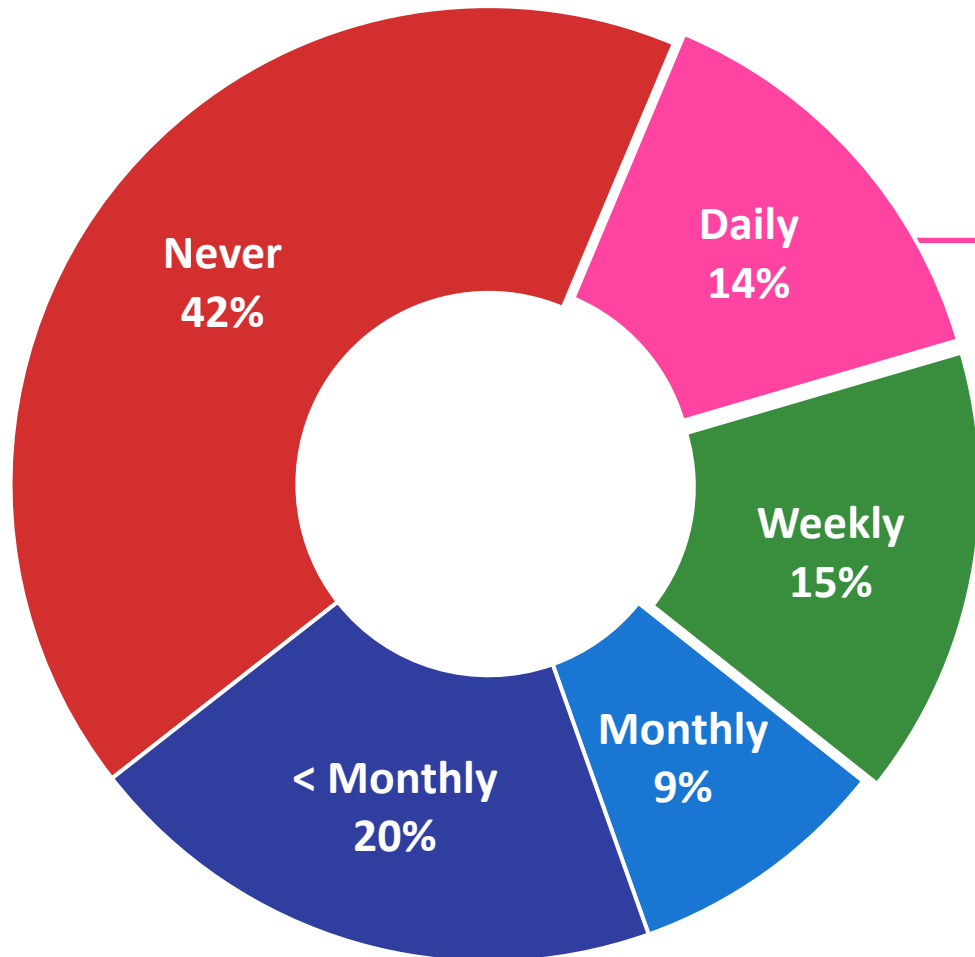


% of time spent with P1 station in a typical week via
traditional platforms (an AM/FM radio at home/school/work or in a vehicle)
vs. digital platforms (computer, mobile, smart speaker, podcasts)

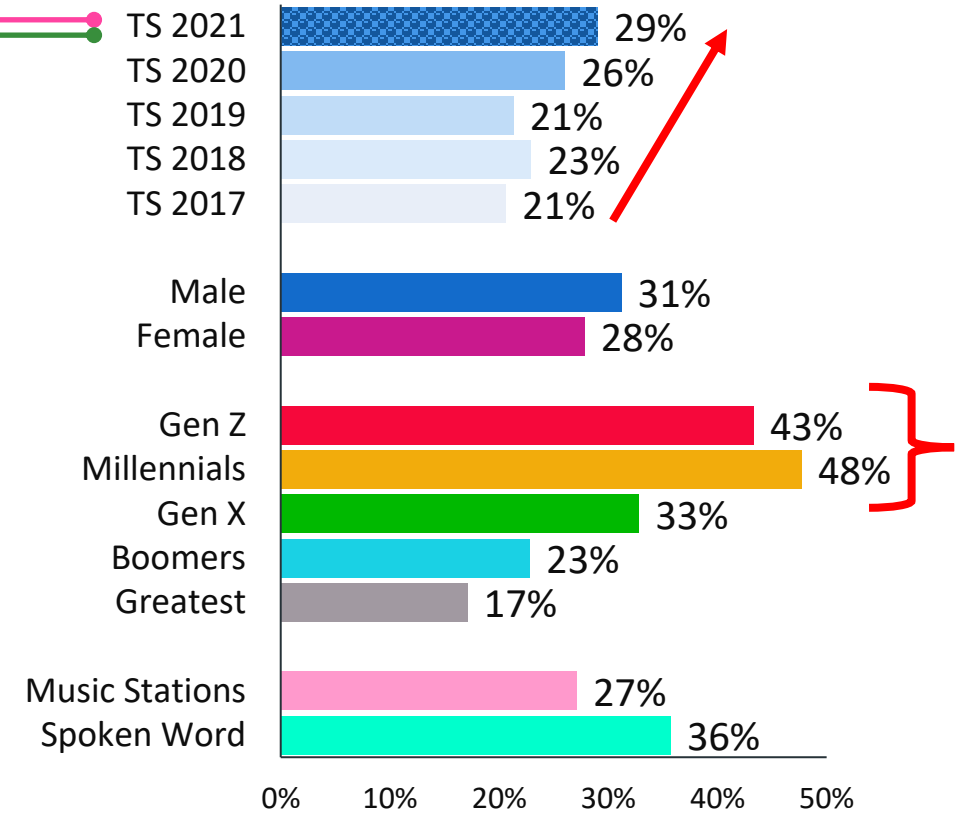


Podcasting grew during COVID, but many still don't make the platform part of their audio listening routines

About Three in Ten Now Listen to Podcasts Weekly or More, Led By Gens Y and Z, and Spoken Word Fans

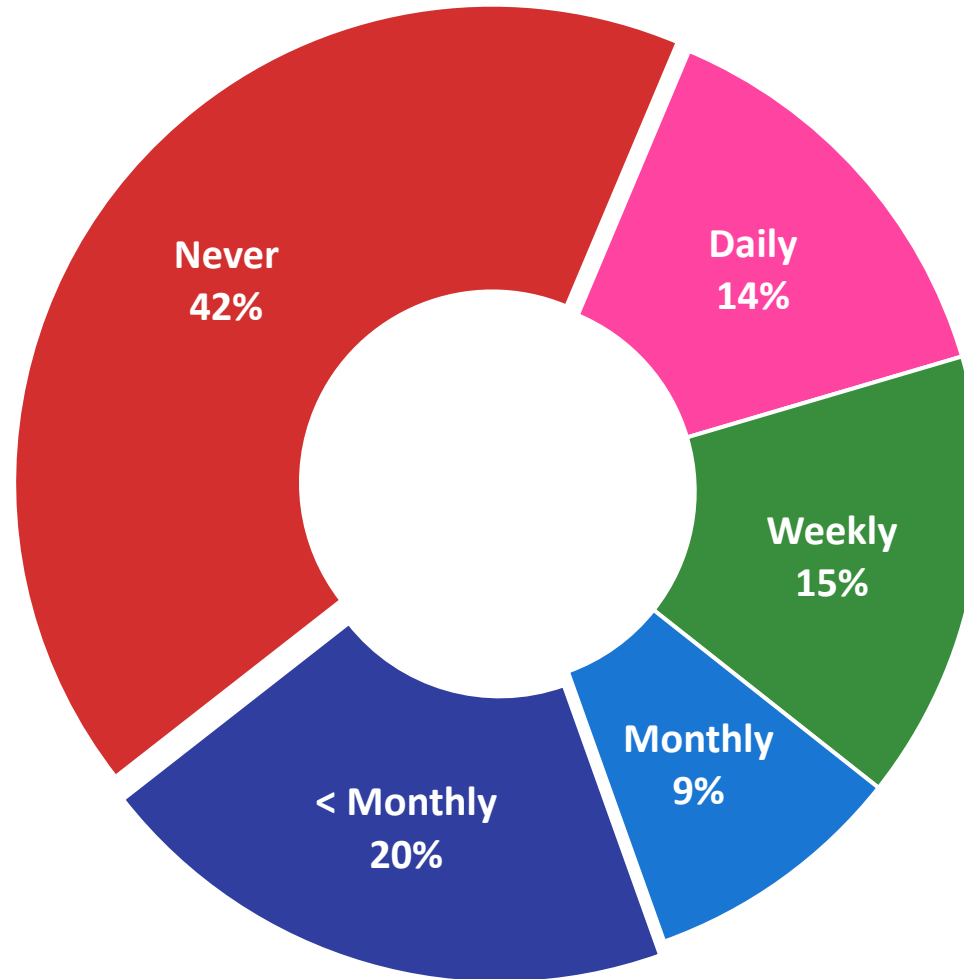


% Who Listen to Podcasts/
On-Demand Audio Weekly or More



Still, More Than Six in Ten Are Not Making Podcasts Part of Their Audio Menu

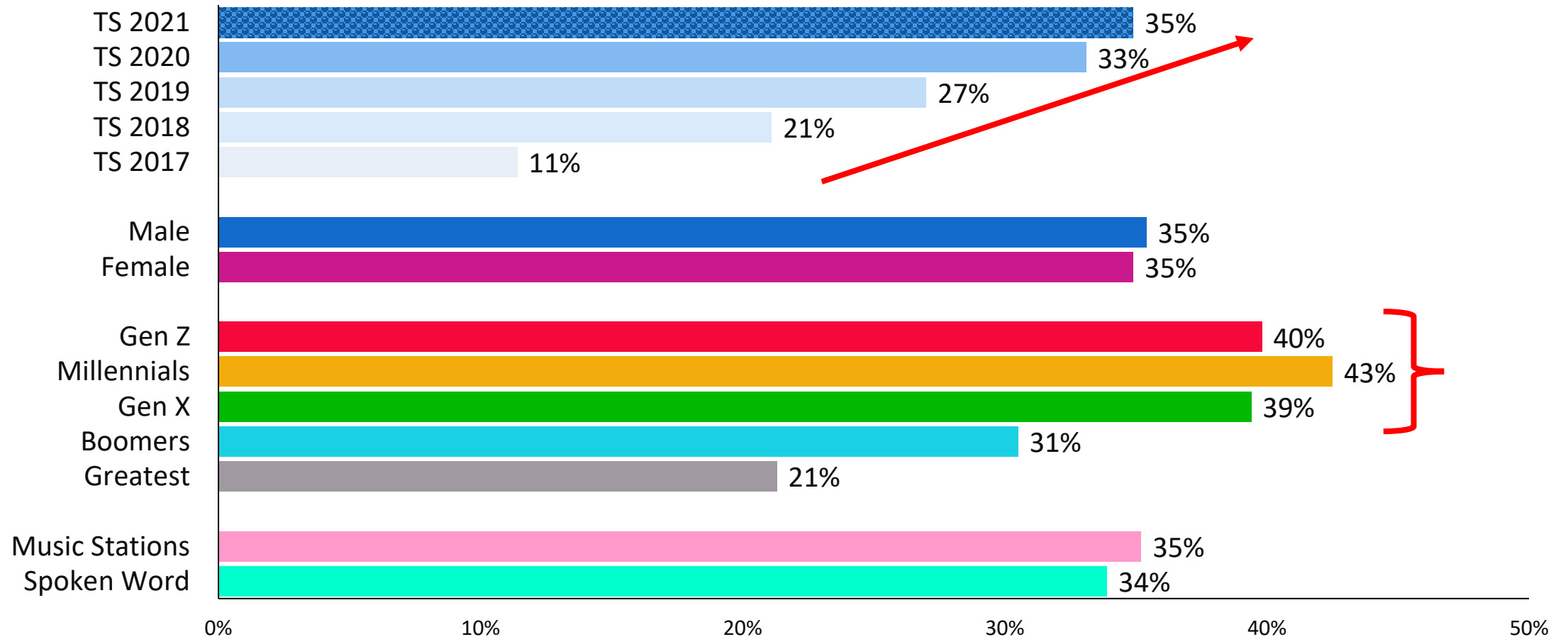
% Who Listen to Podcasts/On-Demand Audio...





**Smart speaker
penetration is
flattening, but
current owners
are buying more
of them**

Smart Speaker Ownership Is Growing...But Slowing Down

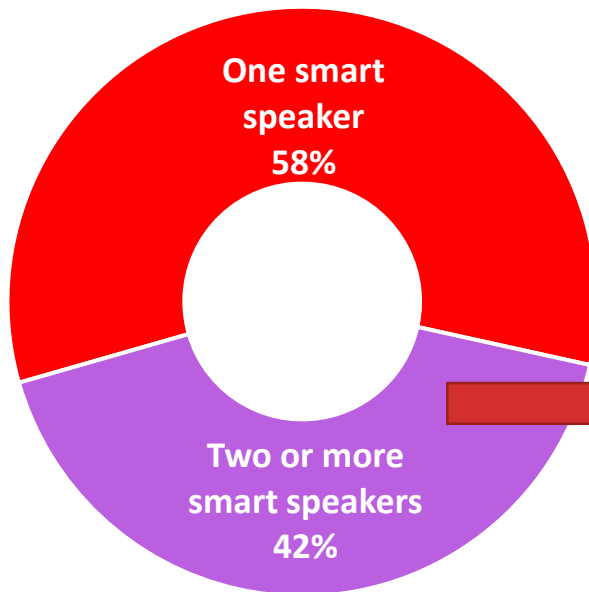


% who own a smart speaker (Amazon Alexa, Google Home/Nest Audio, etc.)

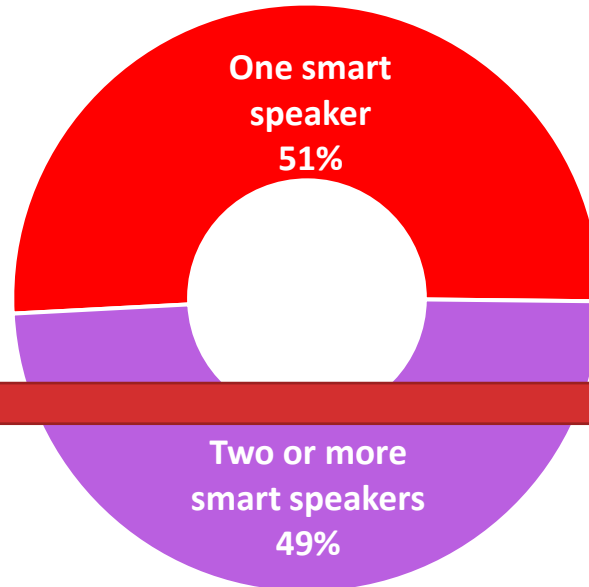
More Than Six in Ten Smart Speaker Owners Now Have More Than One of These Devices

% of Smart Speaker Owners Who Own...

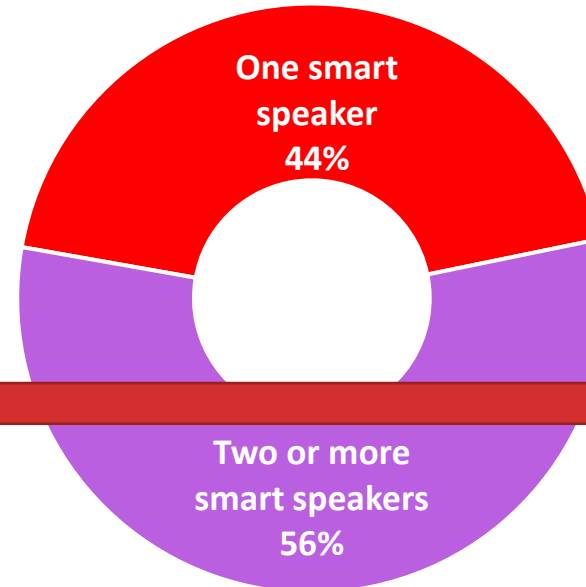
TS 2018



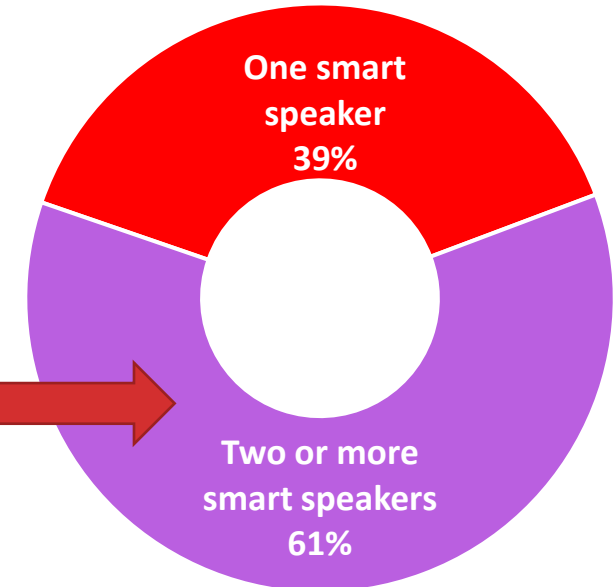
TS 2019



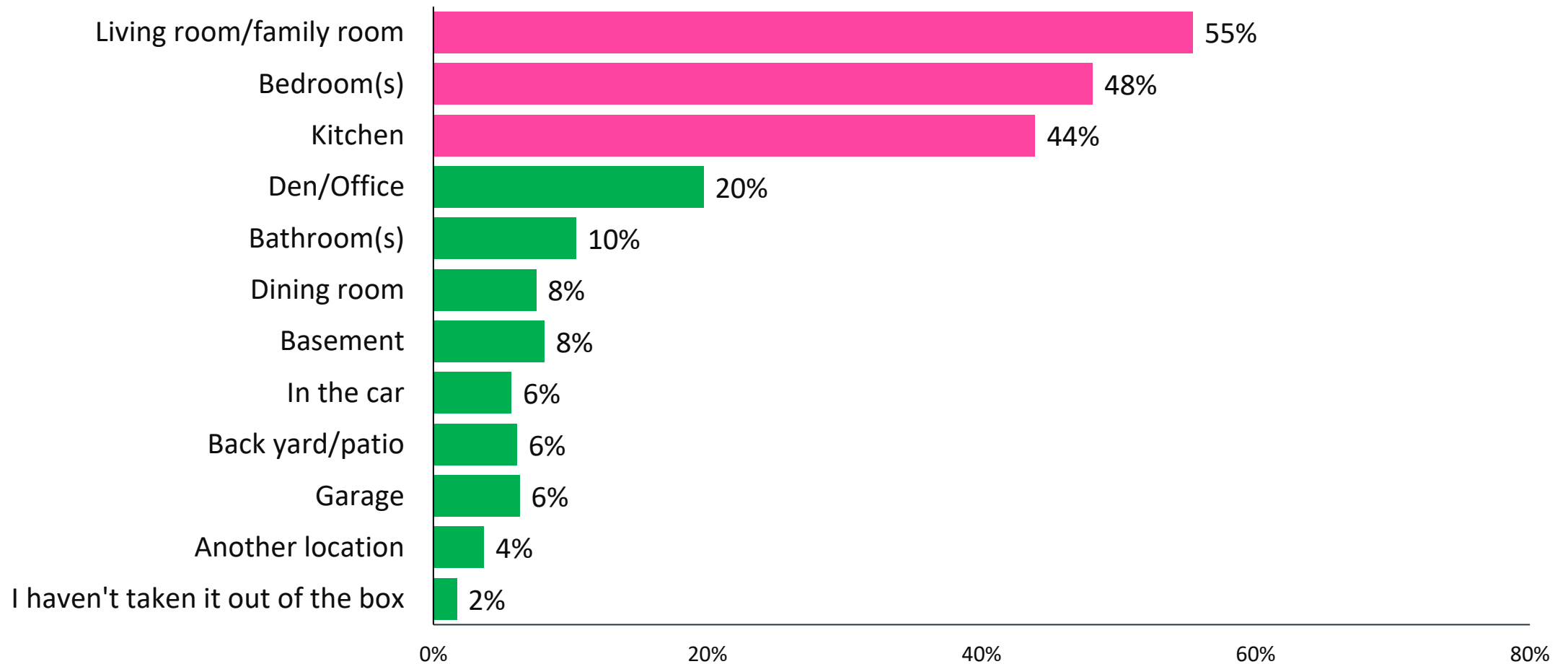
TS 2020



TS 2021

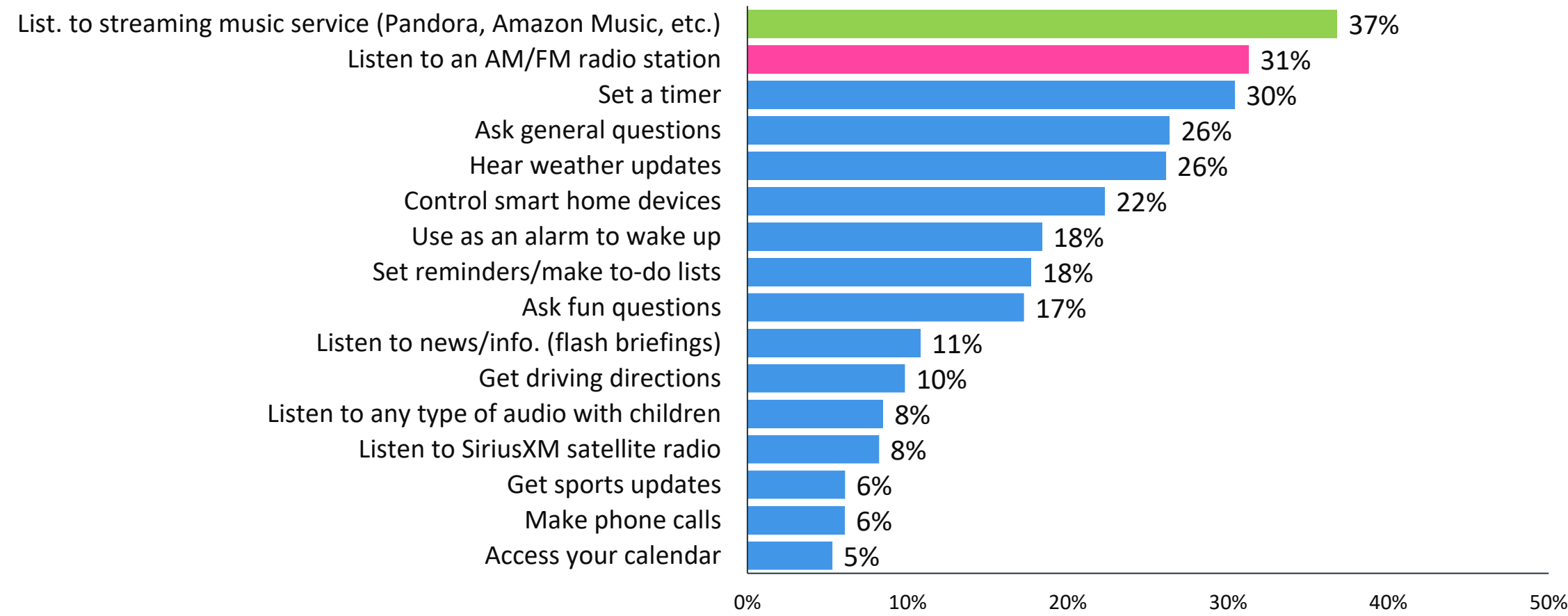


A Majority of Smart Speaker Owners Place Them in Living & Family Rooms; Bedrooms & Kitchens are Close Behind



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; Listening to an AM/FM Radio Station Ranks Second

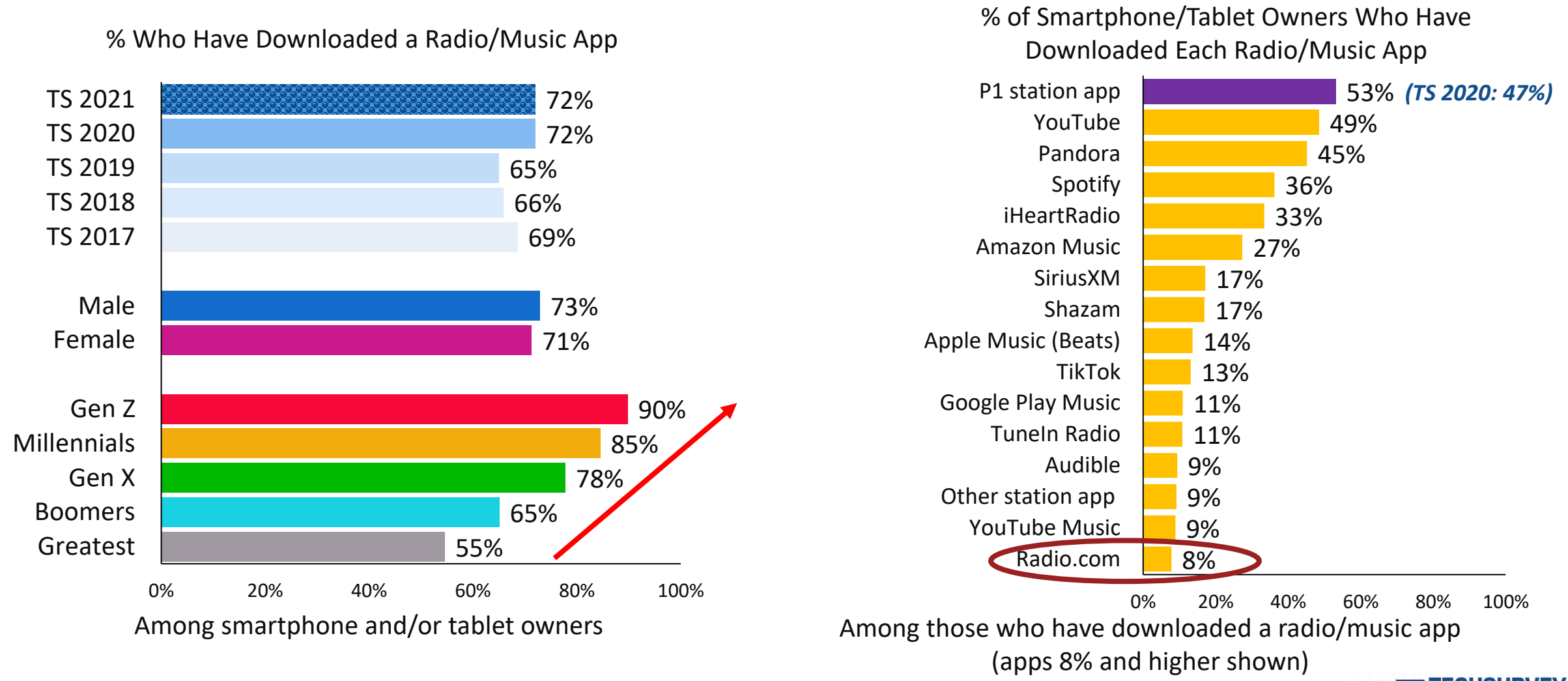


% of smart speaker owners who “frequently” use their device(s) in each way

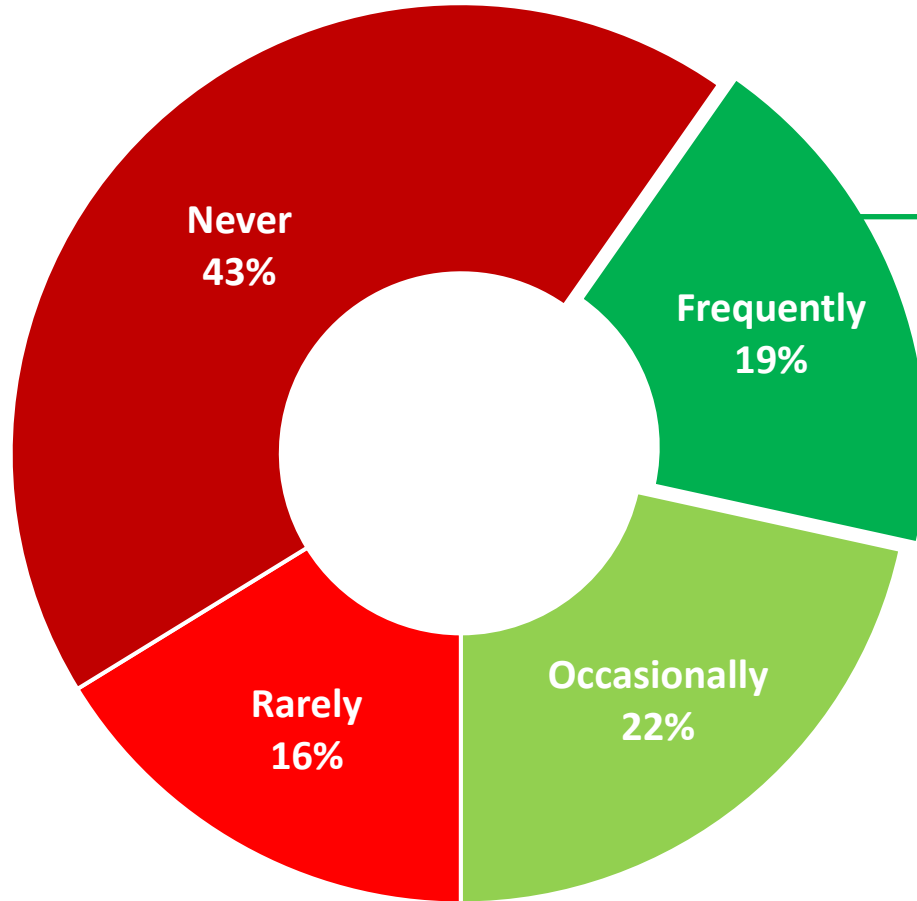


Mobile phones
and apps
continue their
amazing
growth
trajectory

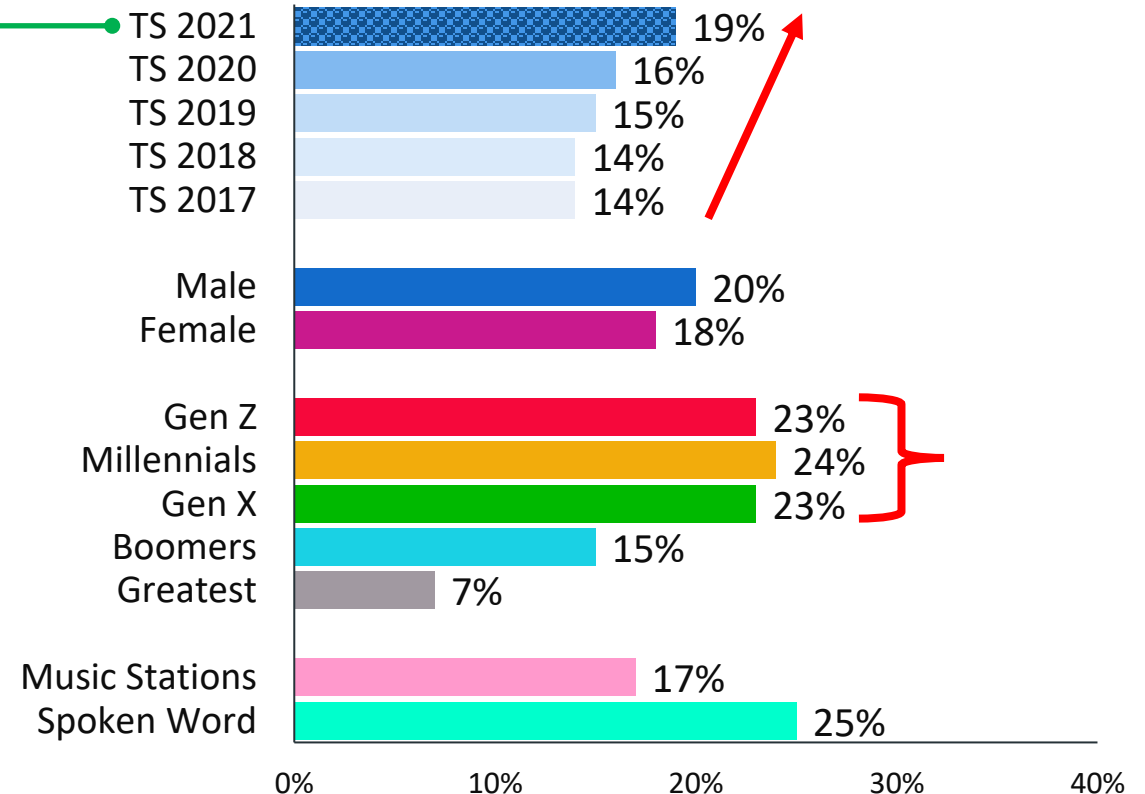
More Than Seven in Ten Have Downloaded Radio/Music Apps, With P1 Station App Downloads on the Rise



Almost One in Five Frequently Listens to Their Favorite Station Via a Mobile App, Especially Younger Generations

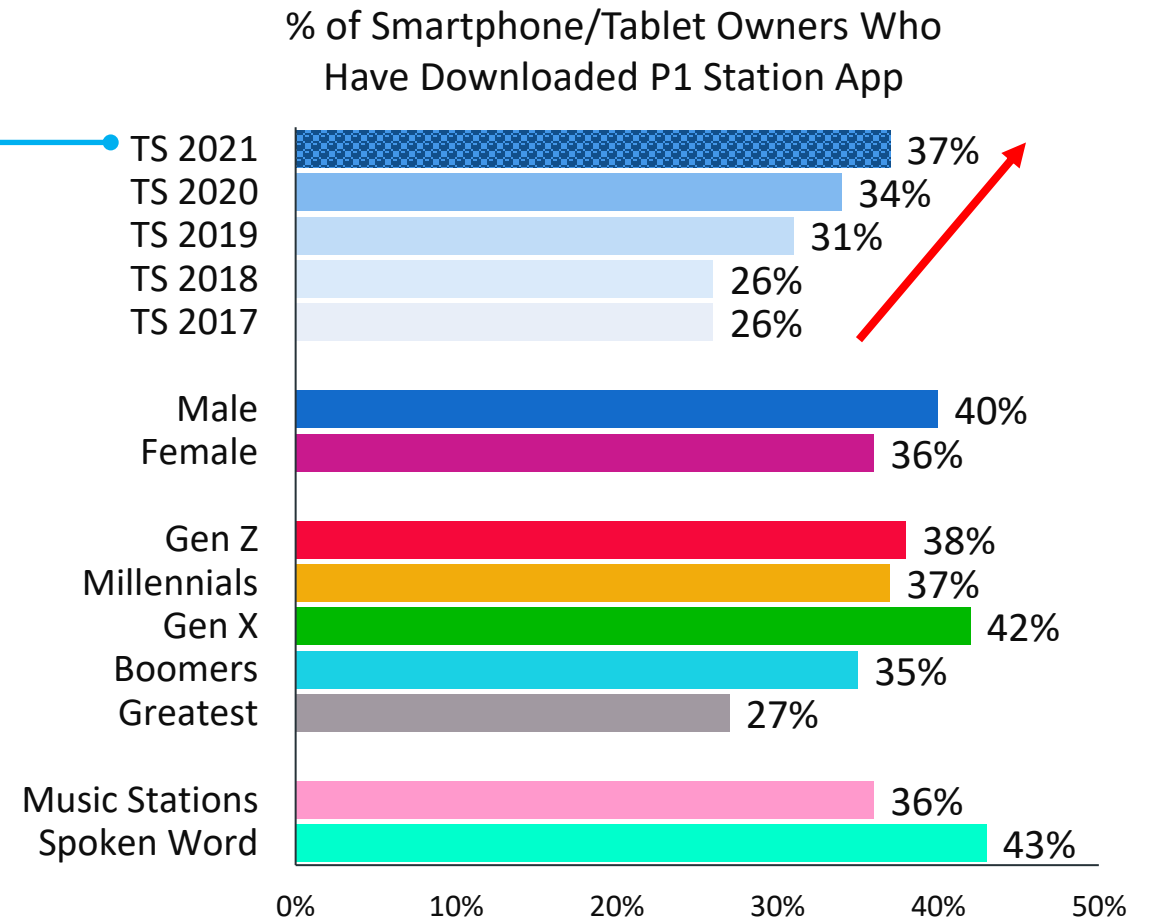
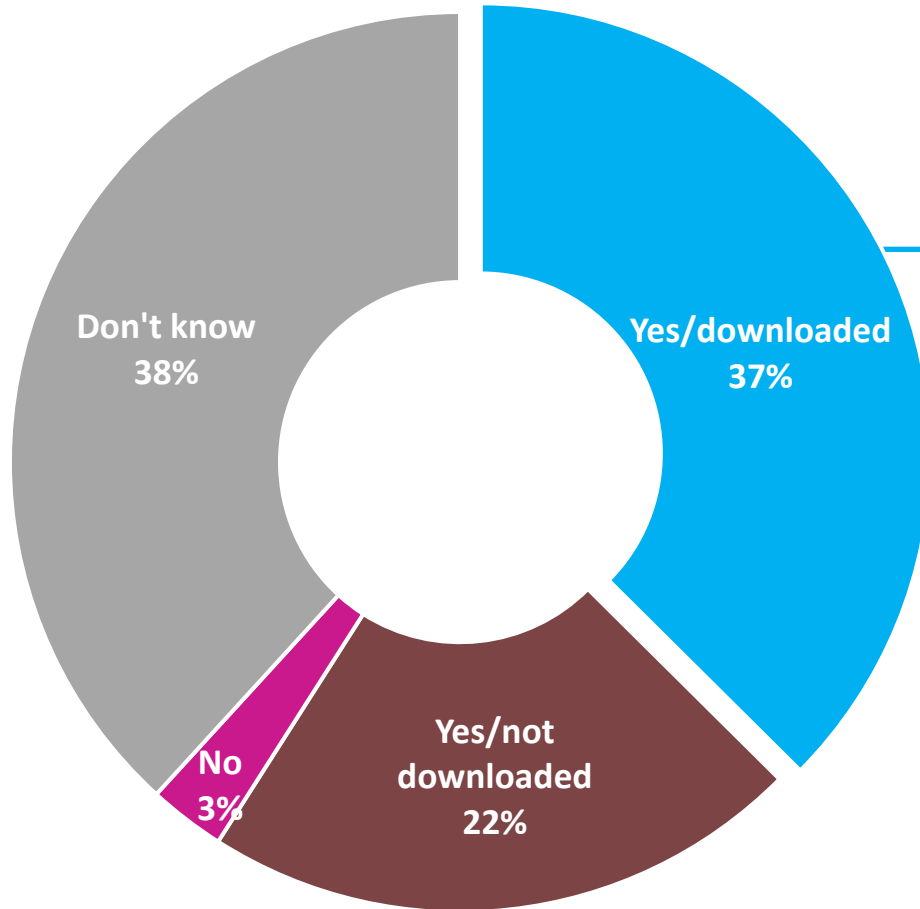


% Who Frequently Stream P1 Station Via a Mobile App

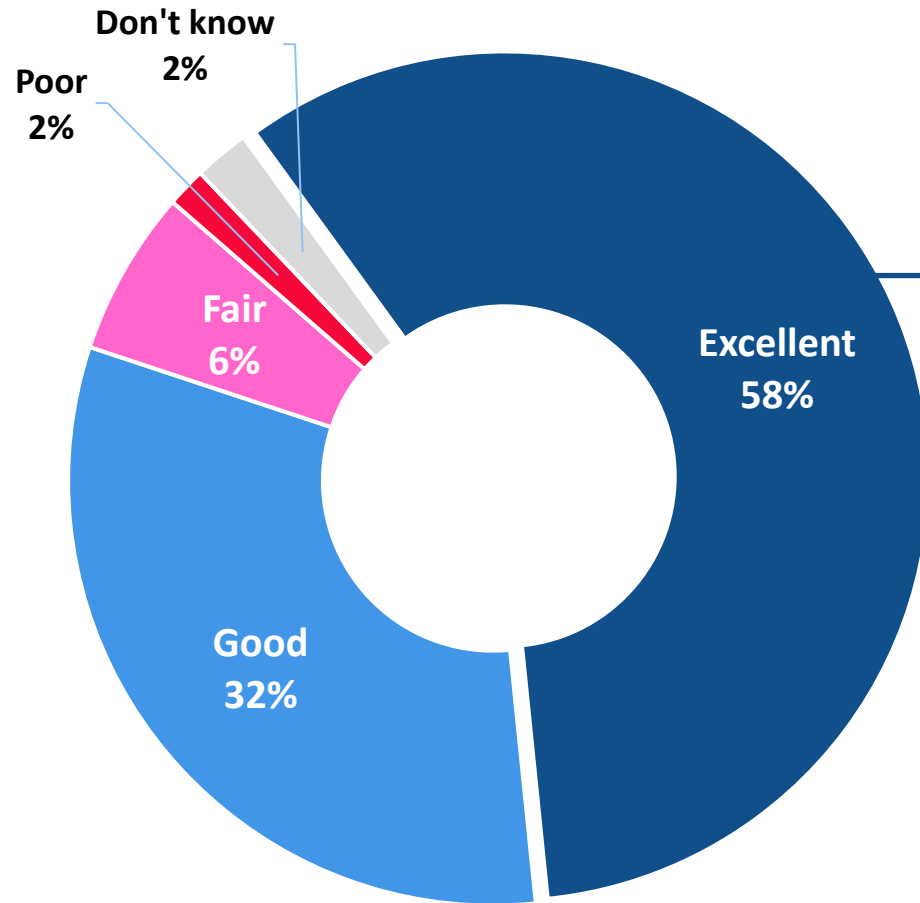


"How often do you access/interact with THE STATION THAT SENT YOU THIS SURVEY using: streaming via a mobile app?"

Six in Ten Mobile Device Owners Are Aware Their P1 Station Has an App; More Than One in Three Has Downloaded It

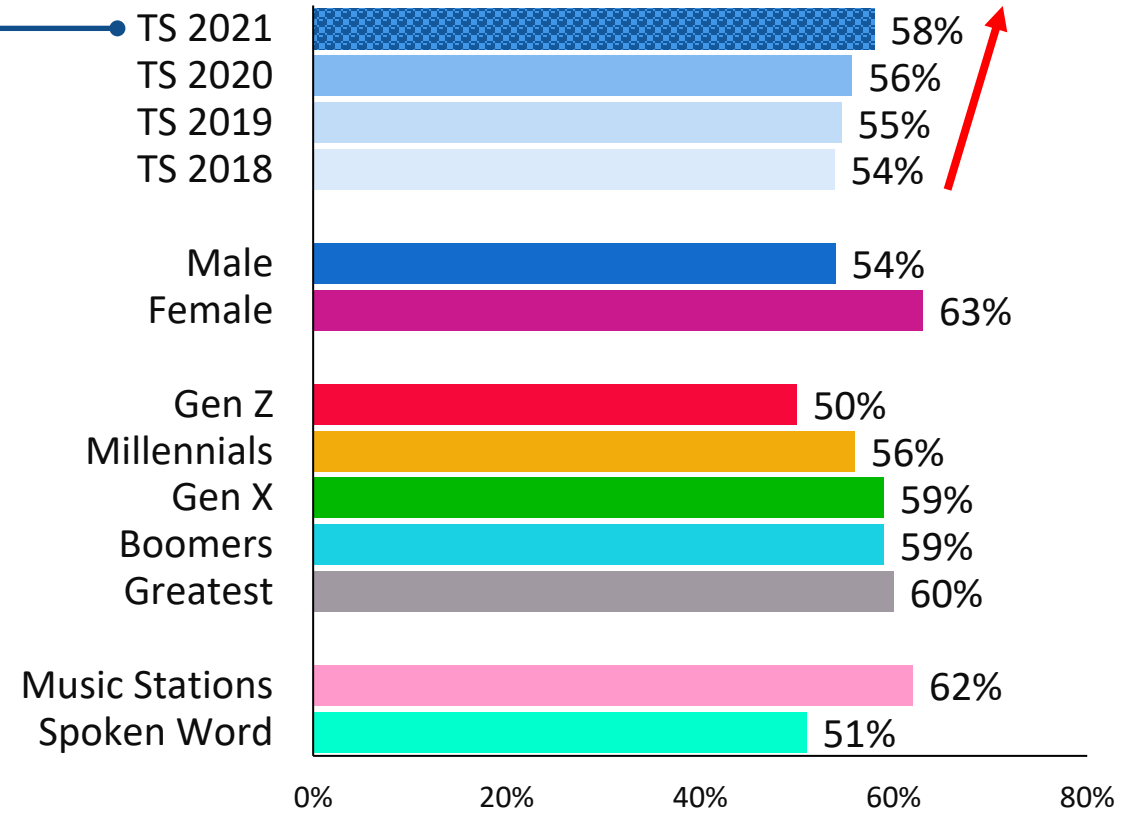


Most Who Have Downloaded Their P1 Station's App Rate It "Excellent"



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

% Who Rate Their P1 Station's App as "Excellent"

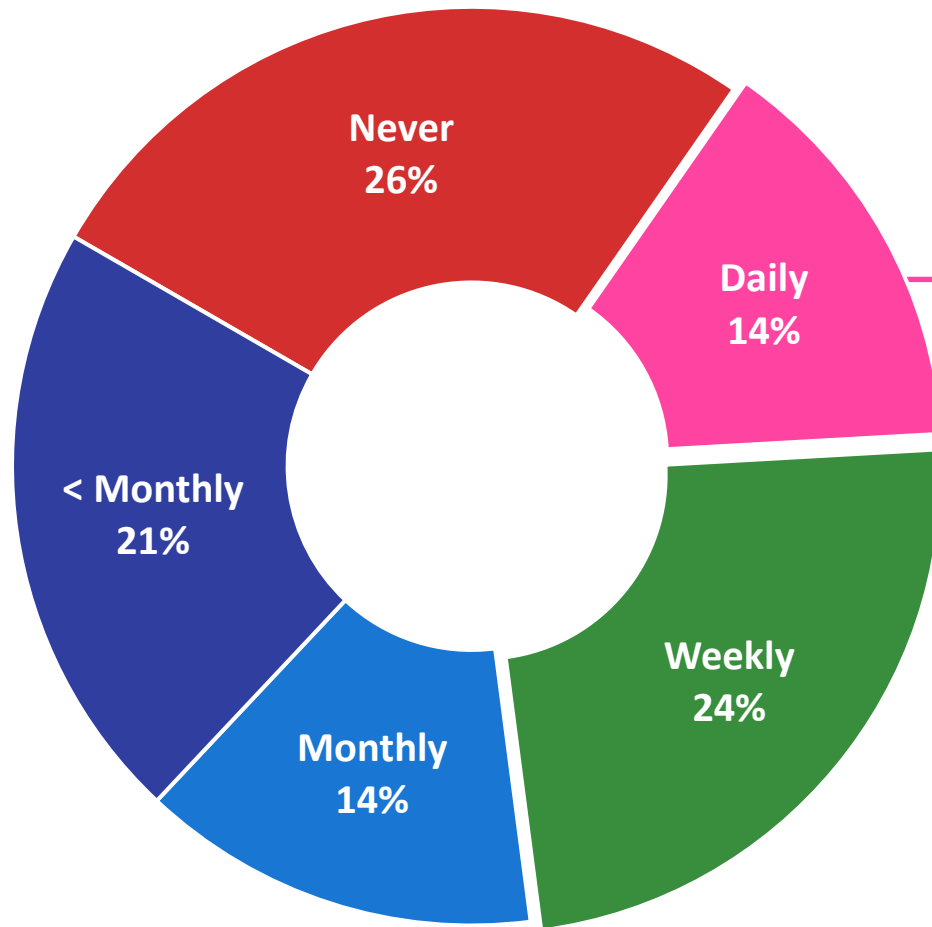


Among smartphone and/or tablet owners
who have downloaded their P1 station's app

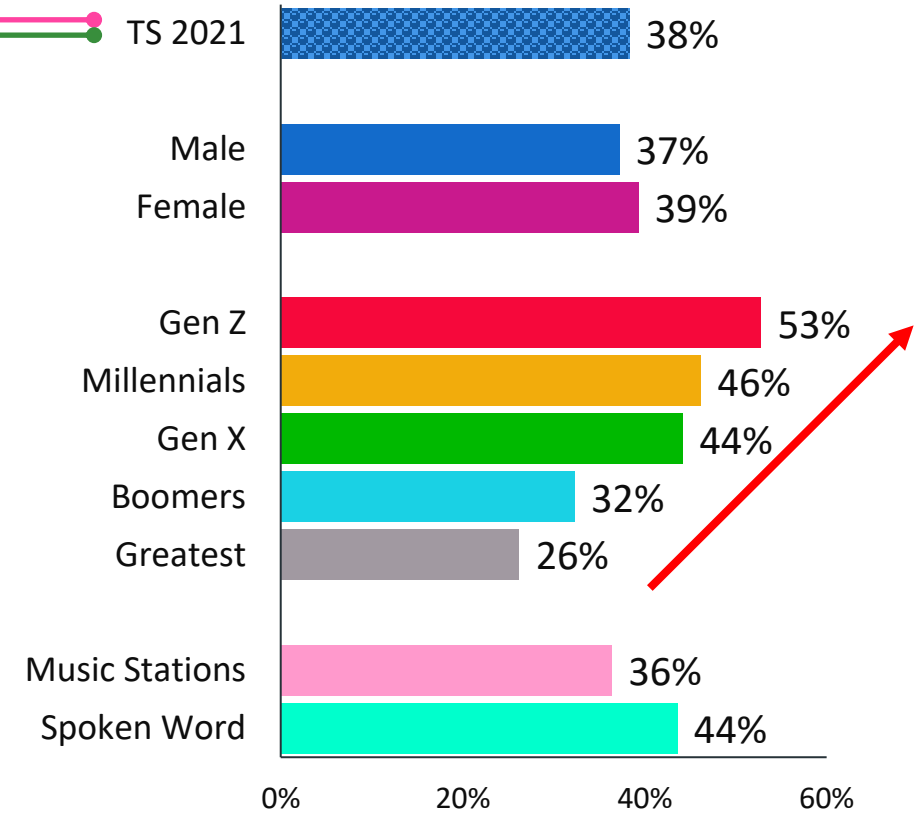


A popular way
to connect
during COVID:
Online
meetings and
gatherings

Nearly Four in Ten Participate in Online Meetings/Calls Weekly or More Often – Especially Progressively Younger Consumers



% Who Participate in Virtual Online Meetings/Calls Weekly or More

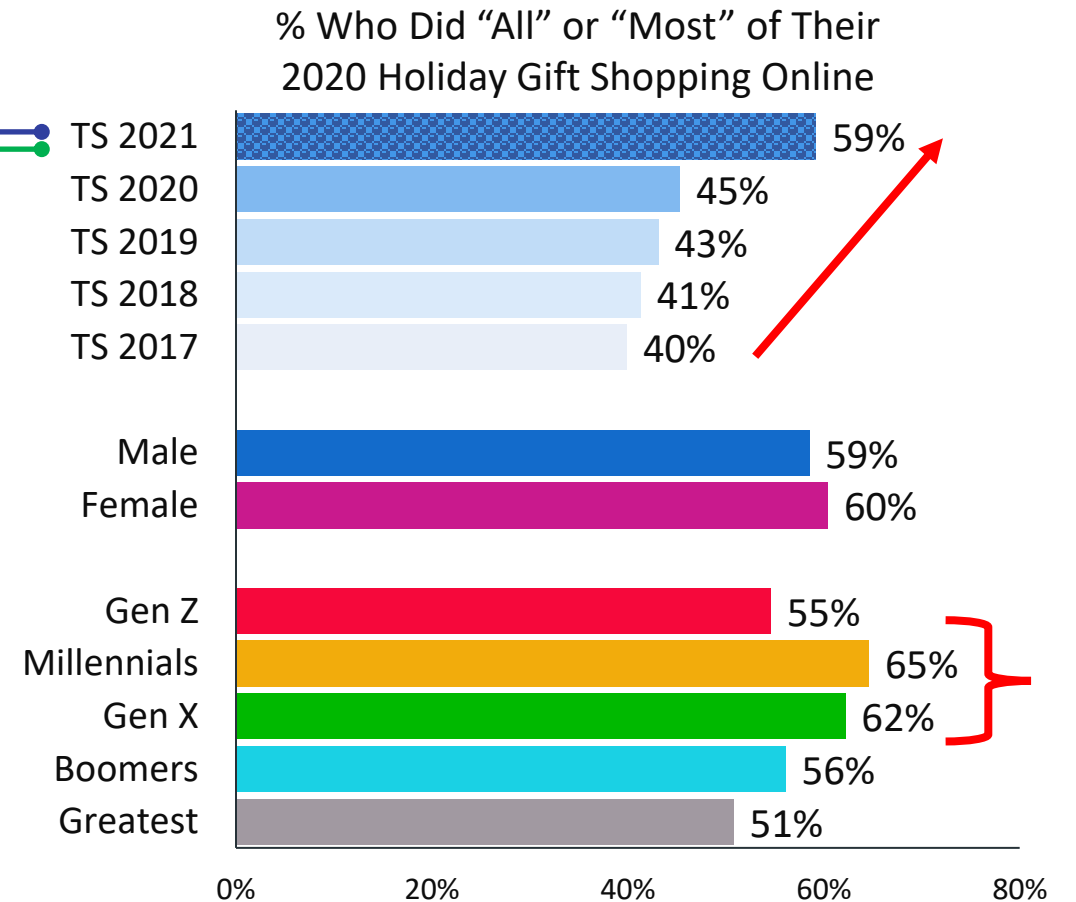
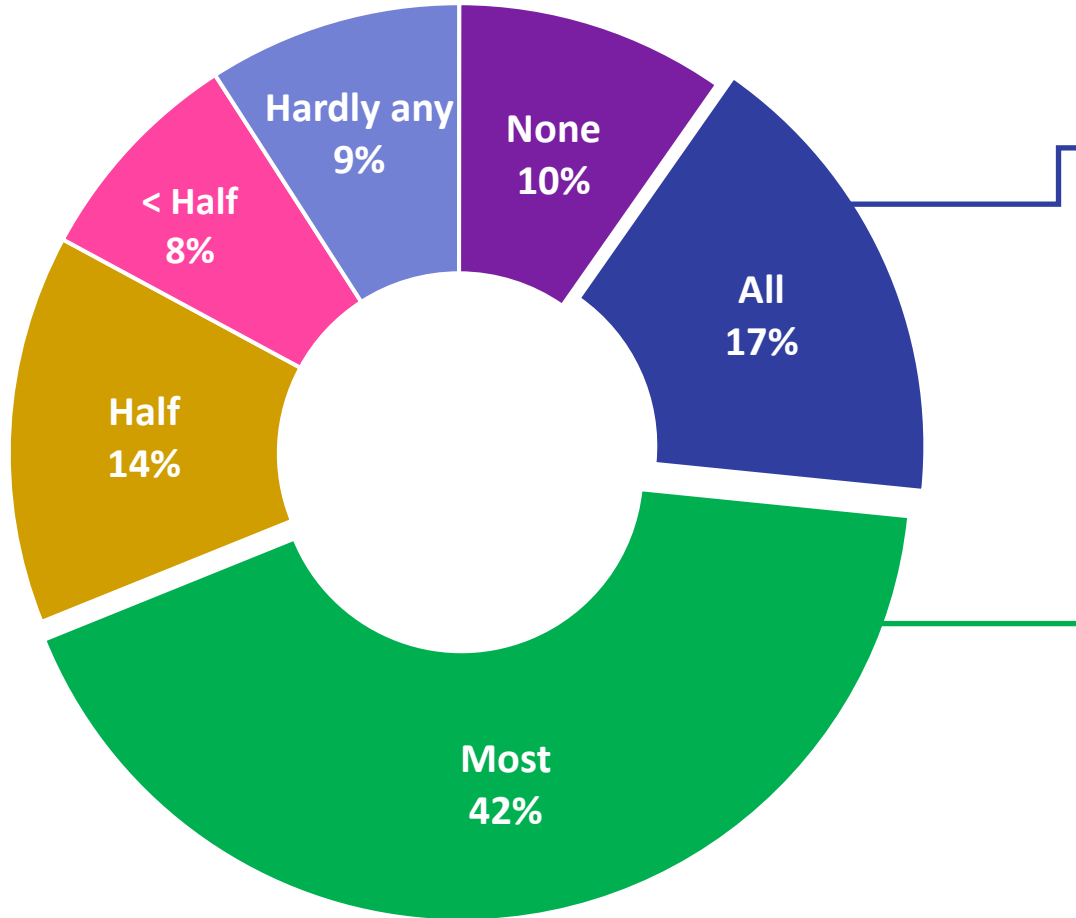


“How often do you participate in virtual online meetings/gatherings/calls on video-chat platforms like Zoom or Google Meet?”



**No surprise -
online holiday
shopping hit
all-time highs**

Online Holiday Shopping in 2020 Jumped Significantly, Led By Millennials & Gen X'ers



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

Key Findings

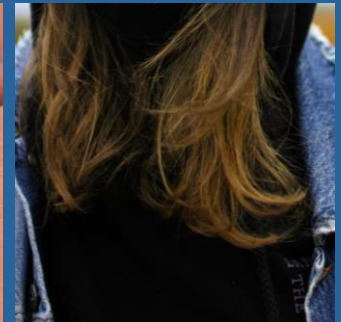
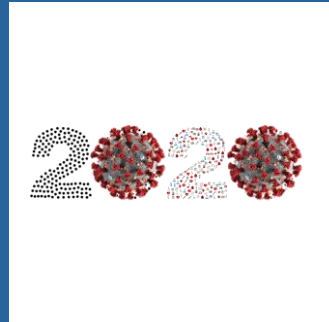
- COVID has hit the audience *hard*, disrupting finances, lifestyles, & media usage; there's no guarantee it will go back to the way it was in 2019.
- No surprise – video streaming was the big winner during COVID
- Audio streaming & podcasting are each stronger, but a majority of the radio audience has little to do with podcasts
- Radio listening continues to slip as the audience ages; usage appears to be coalescing to P1s; NPS higher than ever
- Many feel a connection & emotional attachment to radio; talent & local are more prominent
- The top reasons for radio listening erosion: less time in cars & lifestyle changes
- The overall share of in-car radio is slipping, exacerbated by less time spent in cars
- It's a subscription economy as most use multiple services – especially video
- Listening to radio on digital platforms is picking up steam – streaming on mobile phones & smart speakers is growing
- Mobile apps continue to be popular & more are connecting phones to cars
- Virtual meetings have achieved multi-generational appeal during COVID
- Big tech and social media are creating more skepticism
- E-commerce exploded during this past holiday season

Action Steps

- ✅ 2020 was the year of the stream in radio – at home, it was the only option for many – so promote it
- ✅ Market your apps & smart speakers heavily, creatively & with purpose – they matter more than ever
- ✅ TS21 fielding took place pre-stimulus checks; cash contests may be smart given the money pressures
- ✅ In-car listening will likely be challenged by WFH (less time in cars) for some time to come
- ✅ The in-car experience is crucial; metadata/RDS in cars needs focus
- ✅ Given increasing value of video, stations need a strong visual presence
- ✅ Podcast listening is rising, but still has a long way to go to be considered “mass market”
- ✅ Smart speaker growth is slowing, but multiple gadgets are showing up in home
- ✅ Consumers depend on radio for emotional fulfillment even more since COVID – translate that to your programming, promotion, & talent
- ✅ Lean into your personalities (if you have them) – they may be eclipsing your music
- ✅ Online virtual meetups are a growing part of the culture – find ways your station can participate
- ✅ Local matters: during a global pandemic, it was all about where you live
- ✅ Help your local clients compete – use e-commerce and other digital knowledge you have



Contact Us

- www.jacobsmedia.com
- www.jacapps.com
- fred@jacobsmedia.com
- [@fnjacobs](#)
- [@jacobsmedia](#)
- www.jacobsmedia.com/blog



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Executive Summary

 **TECHSURVEY**
 **2021** JACOBS MEDIA

Radio in the Year of COVID

