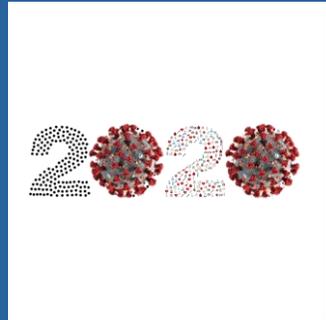




Jacobs  
media strategies

Executive Summary

TECHSURVEY  
2021 JACOBS MEDIA



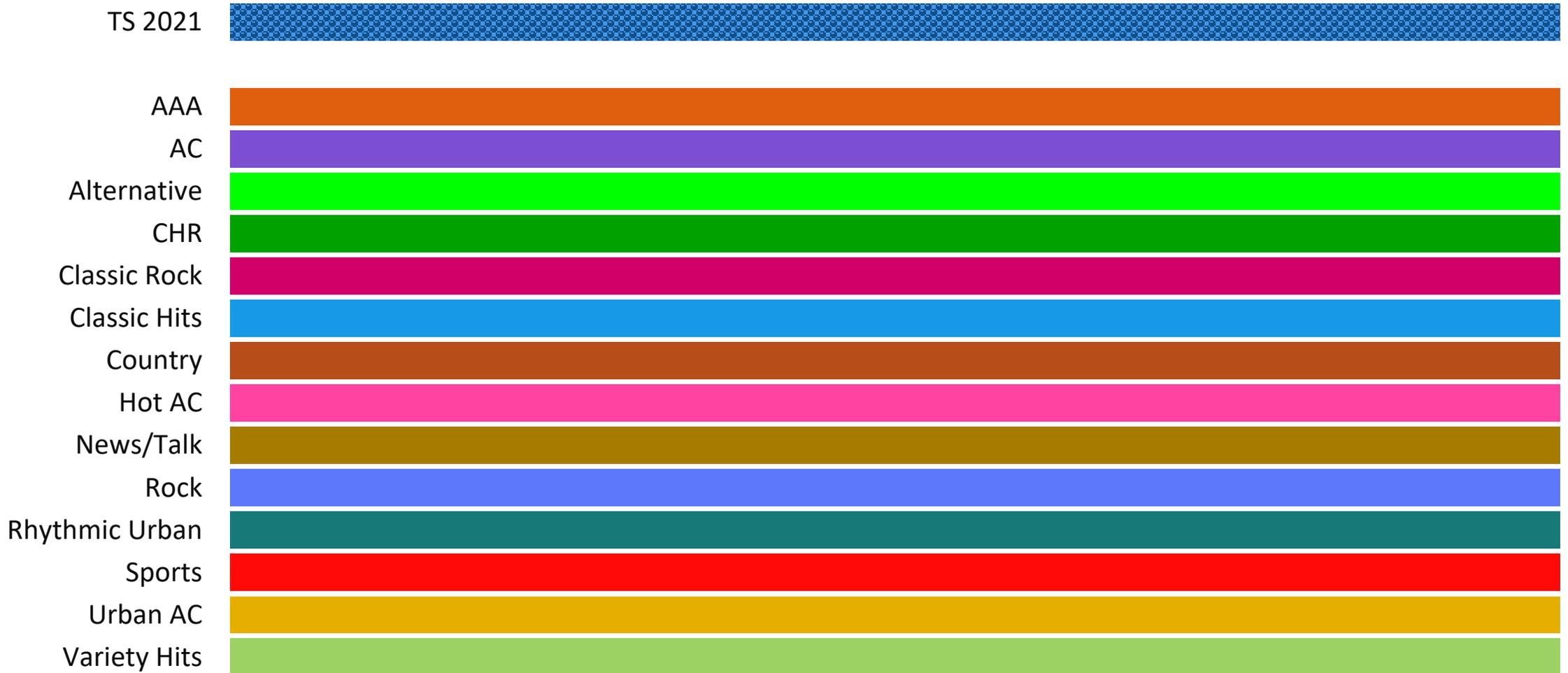
# Radio in the Year of COVID



# 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



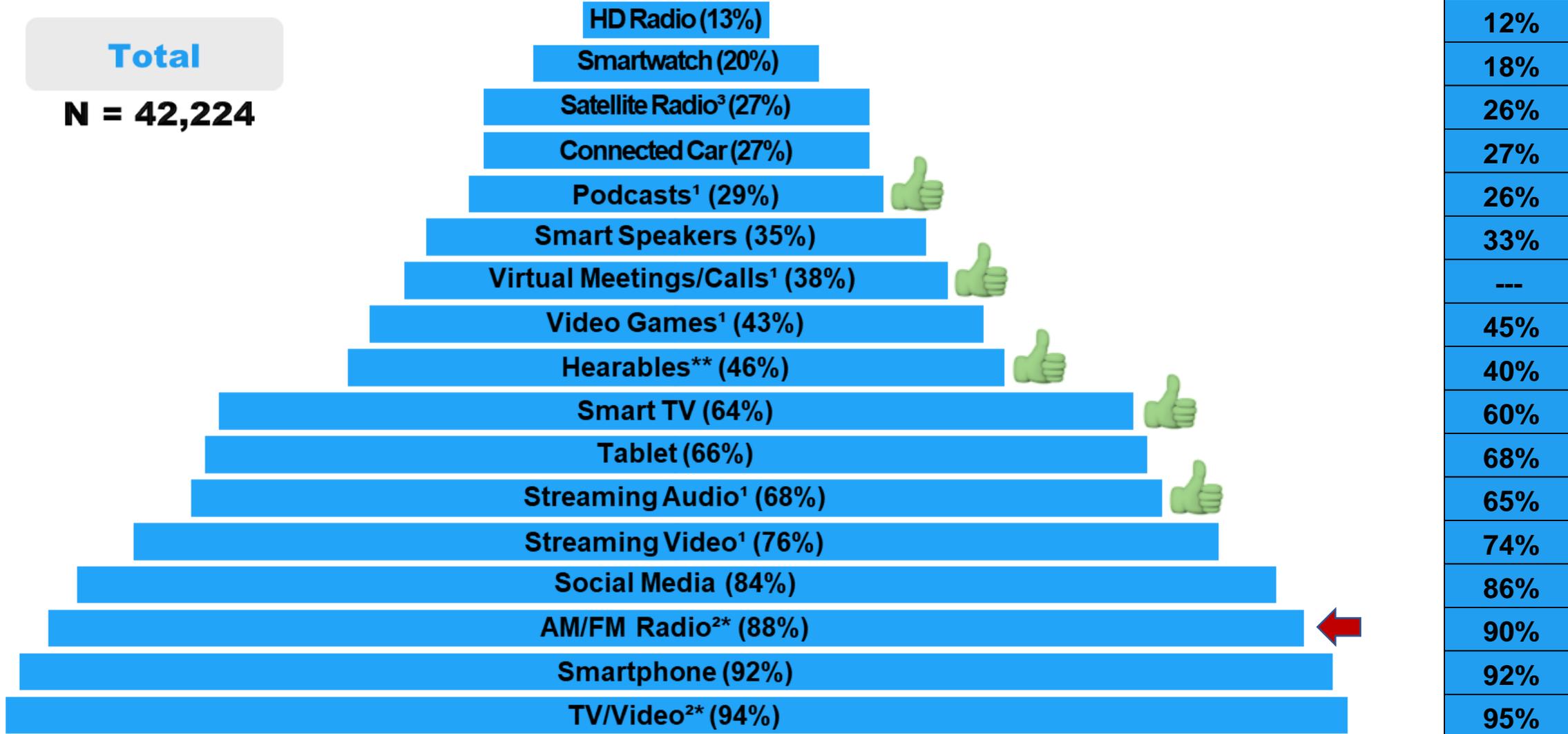




# Media Pyramid 2021

Total

N = 42,224



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



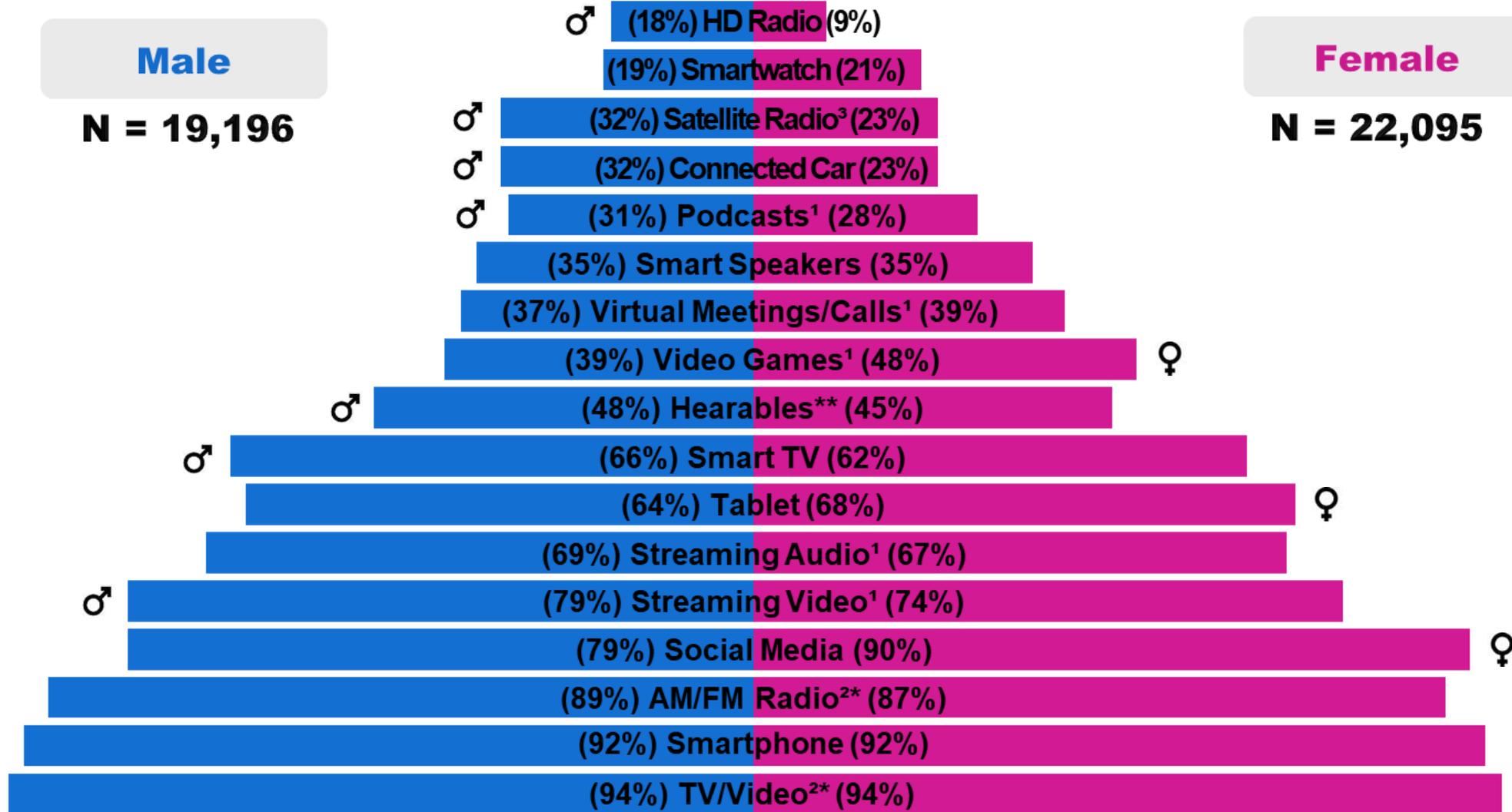
# Media Pyramid 2021

Male

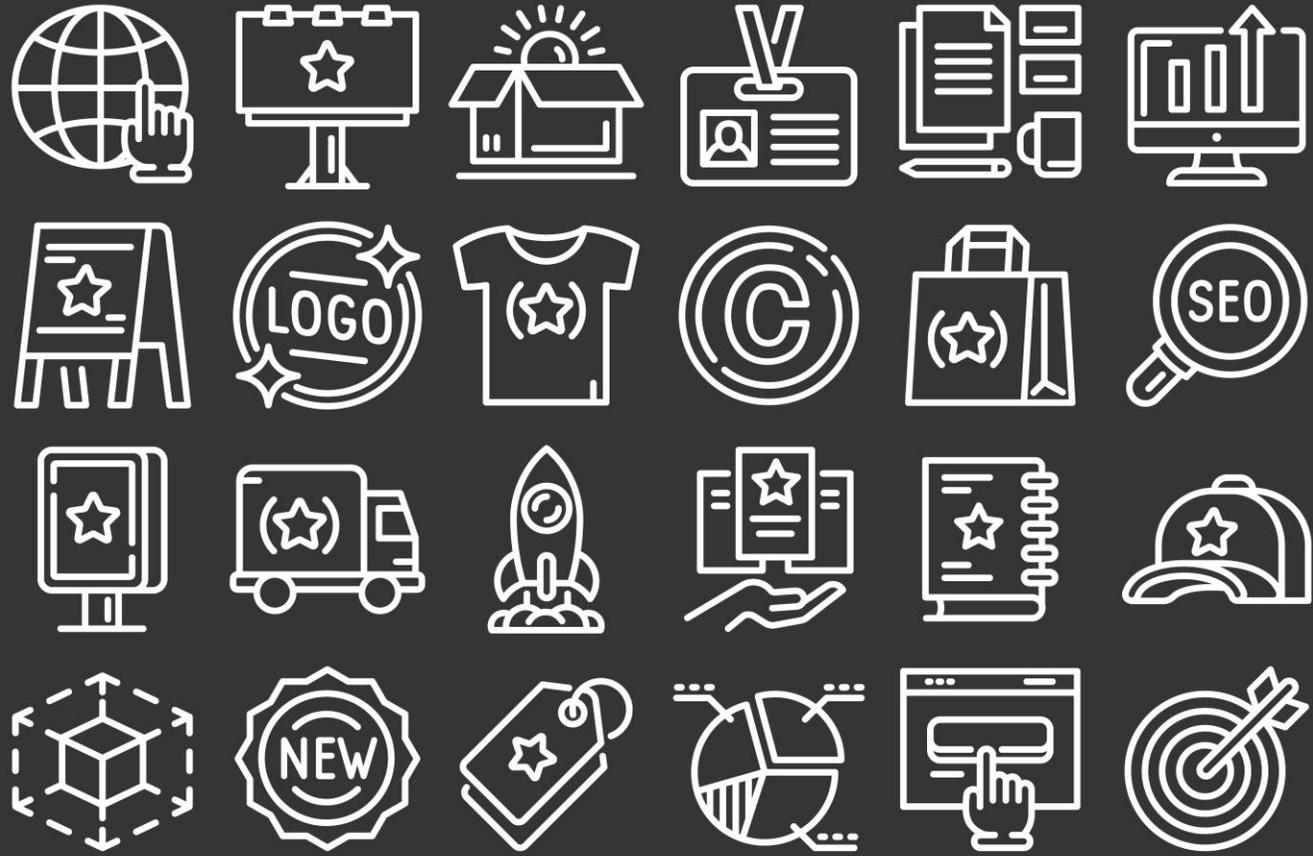
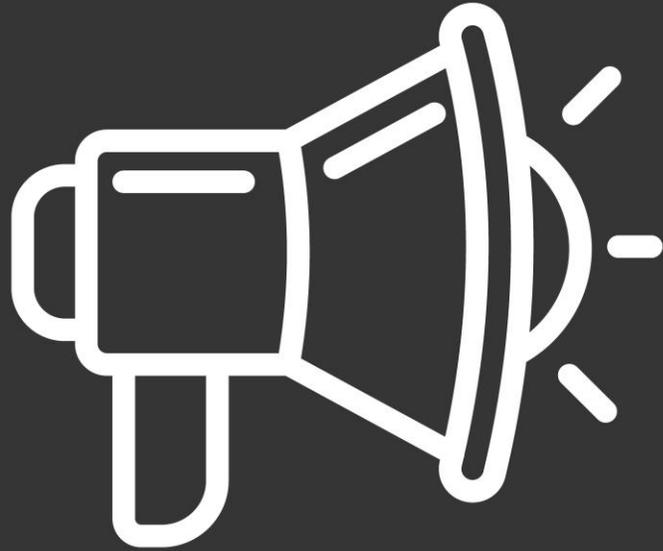
N = 19,196

Female

N = 22,095



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



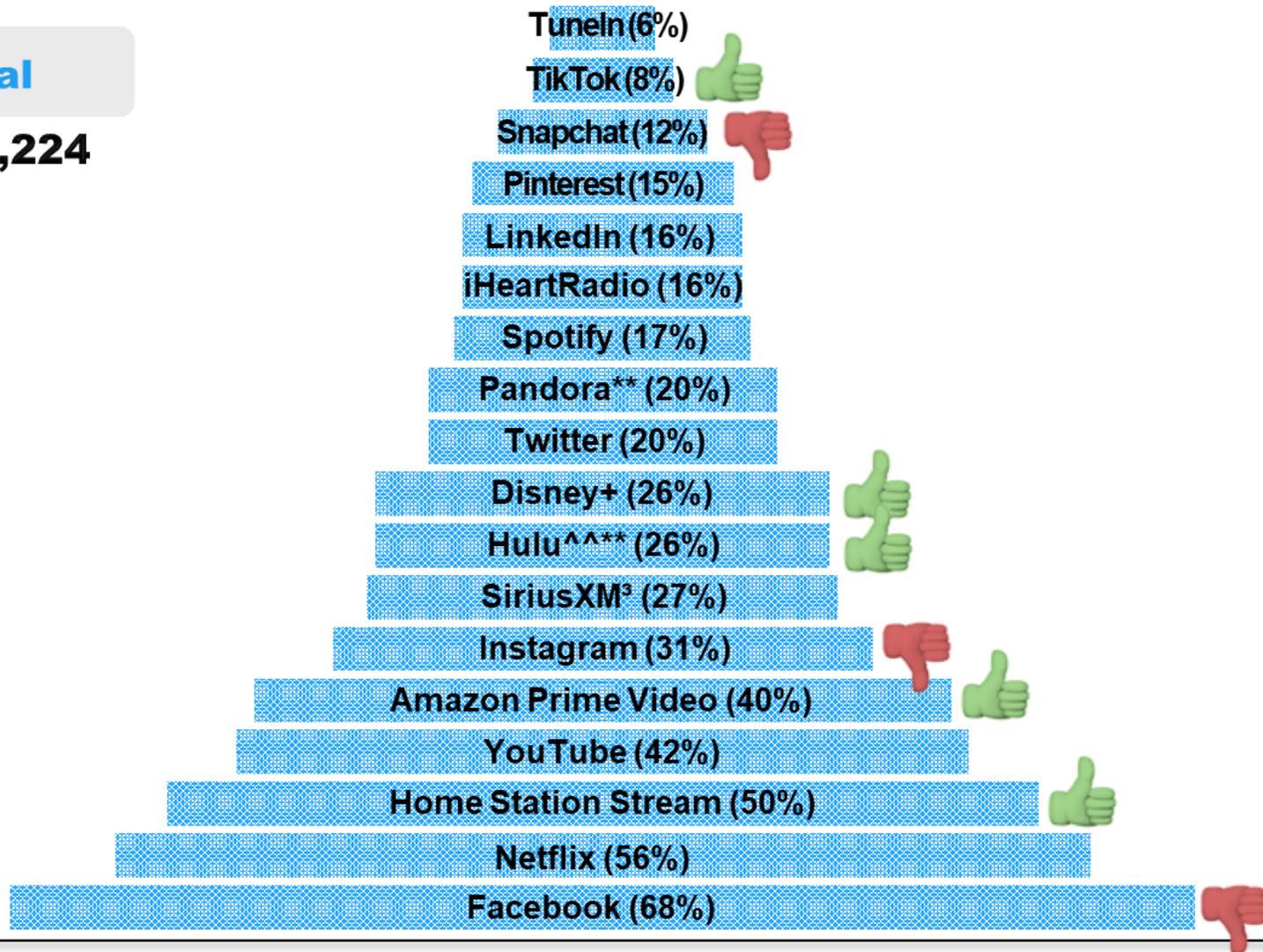
# Media Brand Pyramids



# 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 <sup>2</sup> 1+ hour per day <sup>3</sup> Paid & trial users <sup>\*</sup>Any Platform/Device <sup>\*\*</sup>Excluding Canada <sup>^^</sup>Includes Live TV



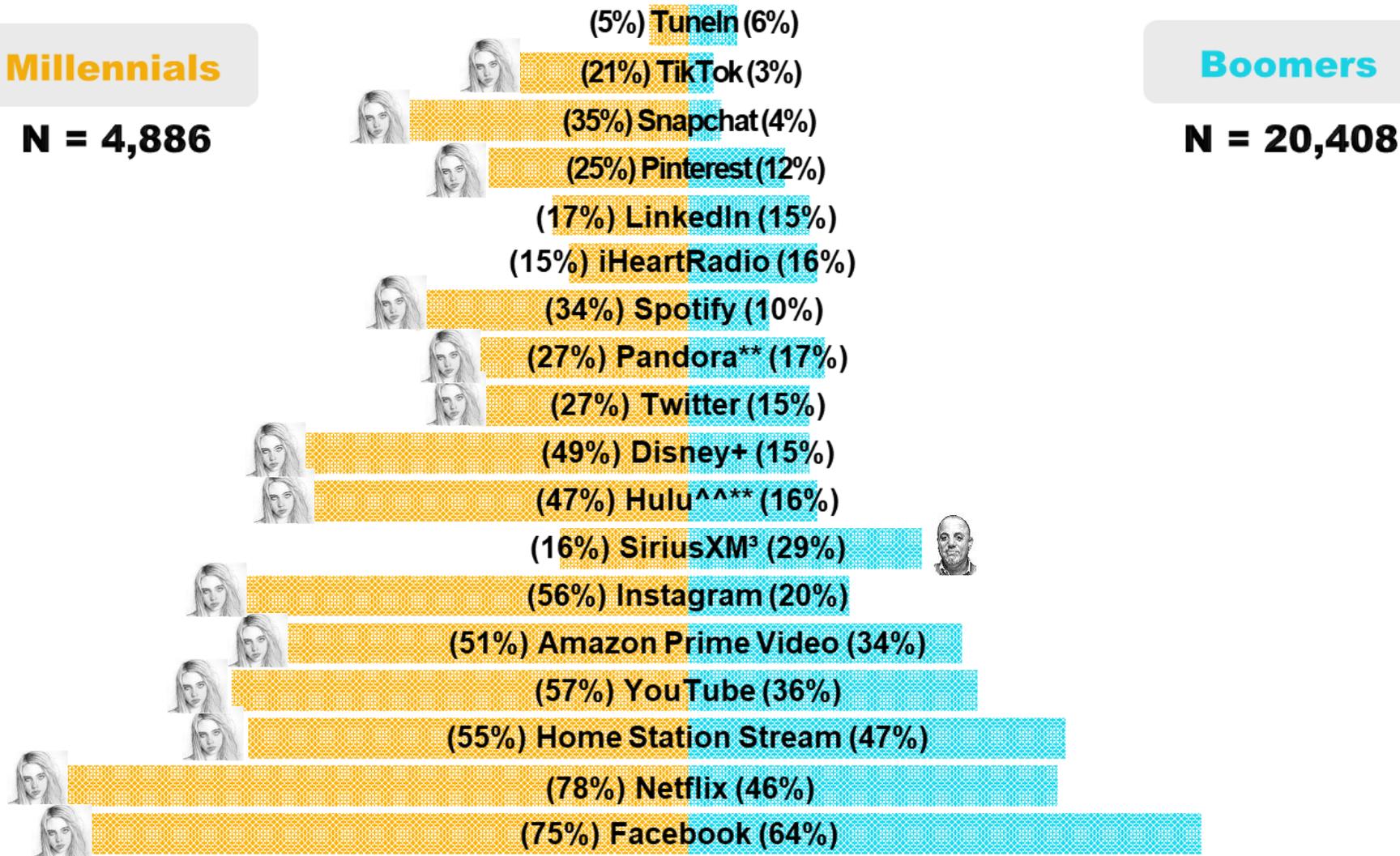
# Brand Pyramid 2021

## Millennials

N = 4,886

## Boomers

N = 20,408



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

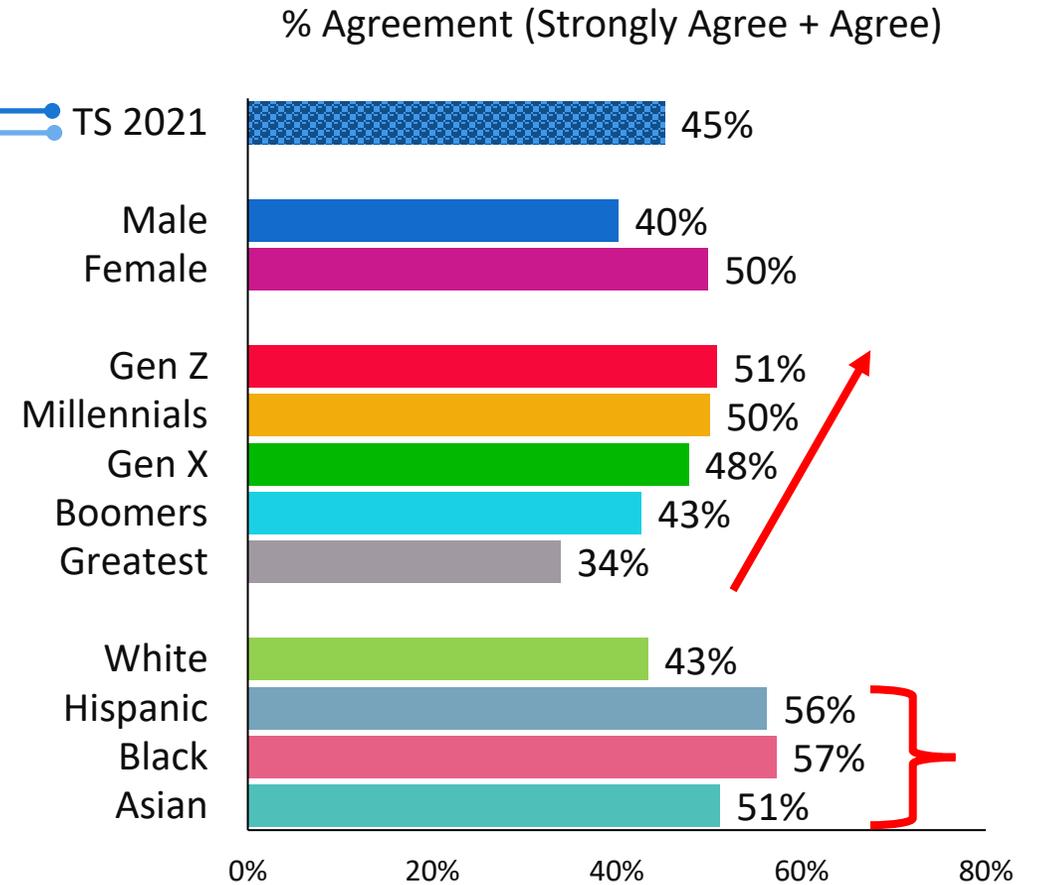
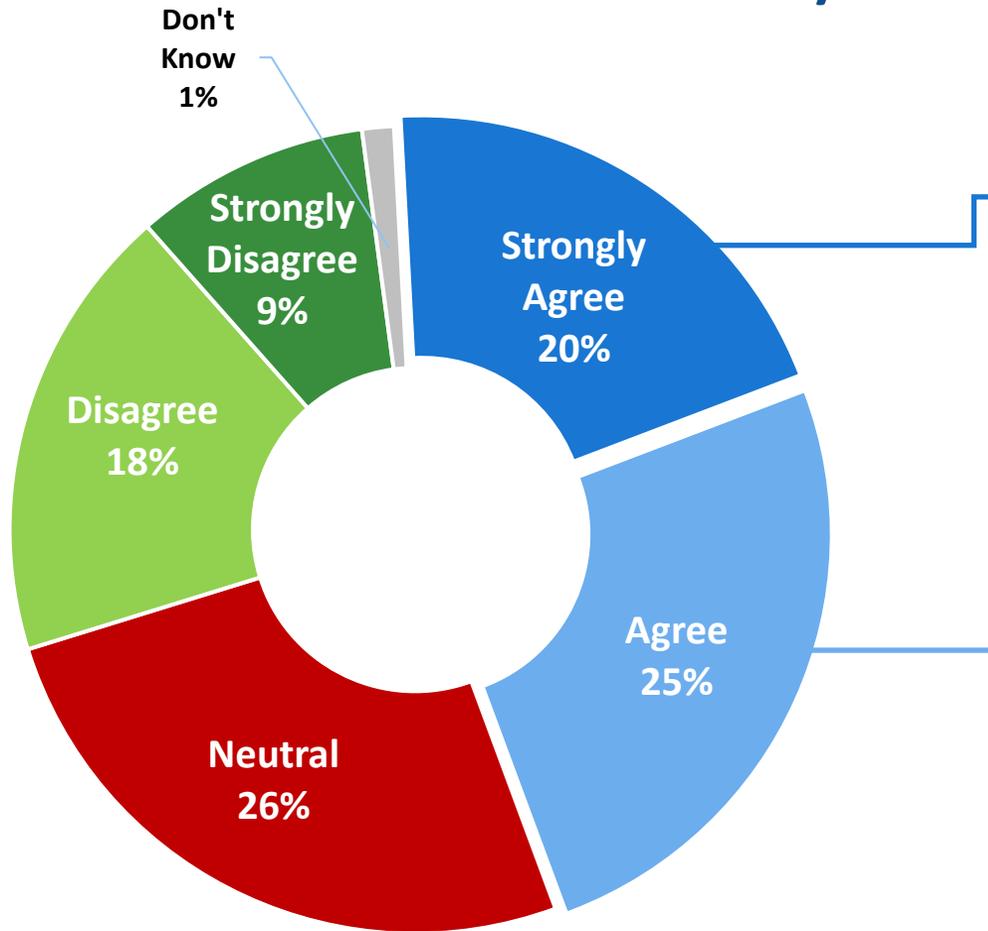


# Key Takeaways



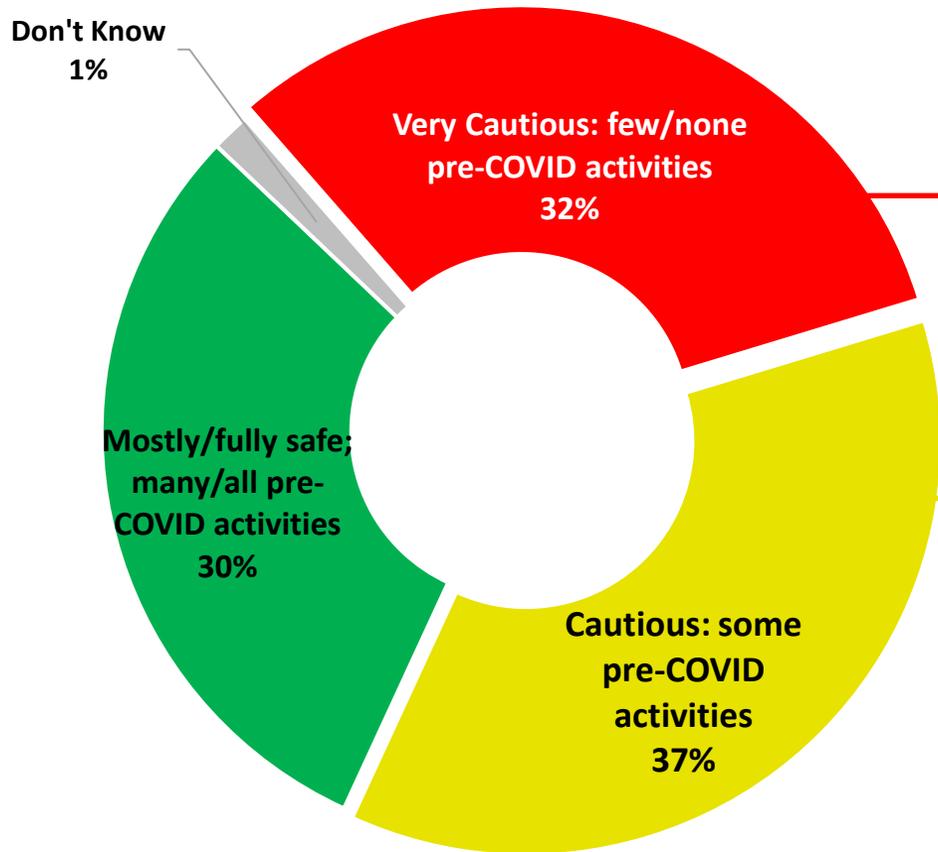
# COVID's Big Disruptions: finances & lifestyle activities

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



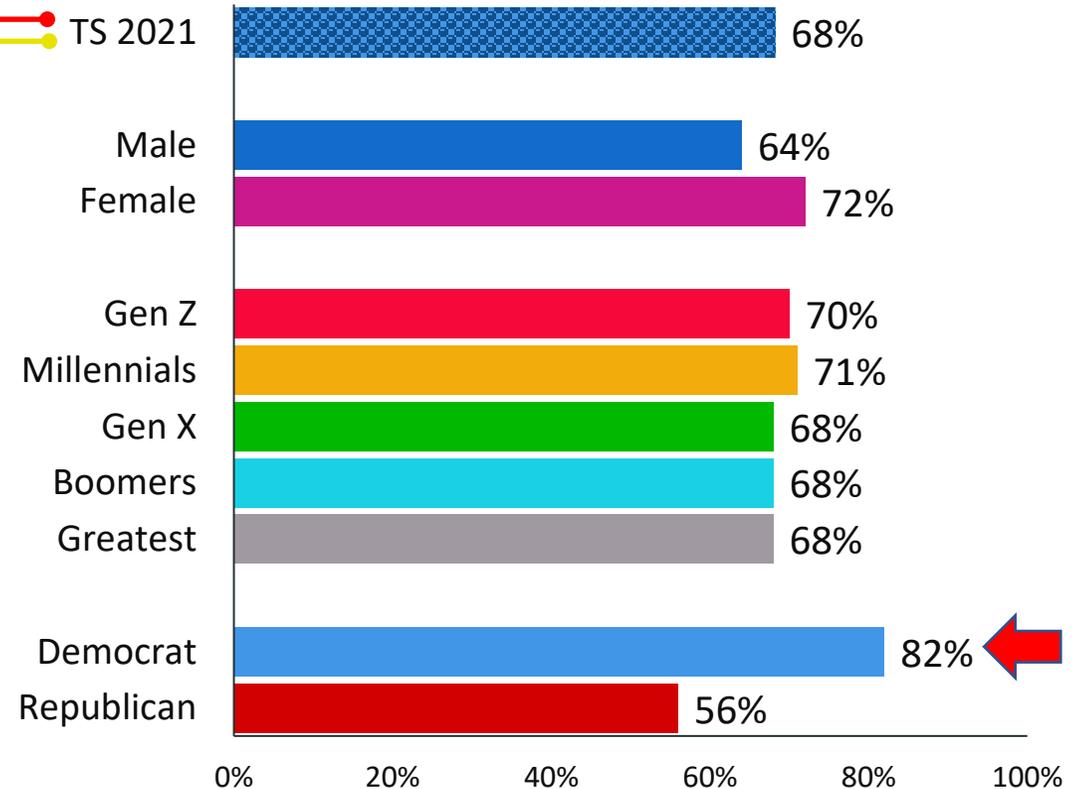
*"Compared to one year ago, I'm worried more now about my household's financial situation"*

# 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?"*

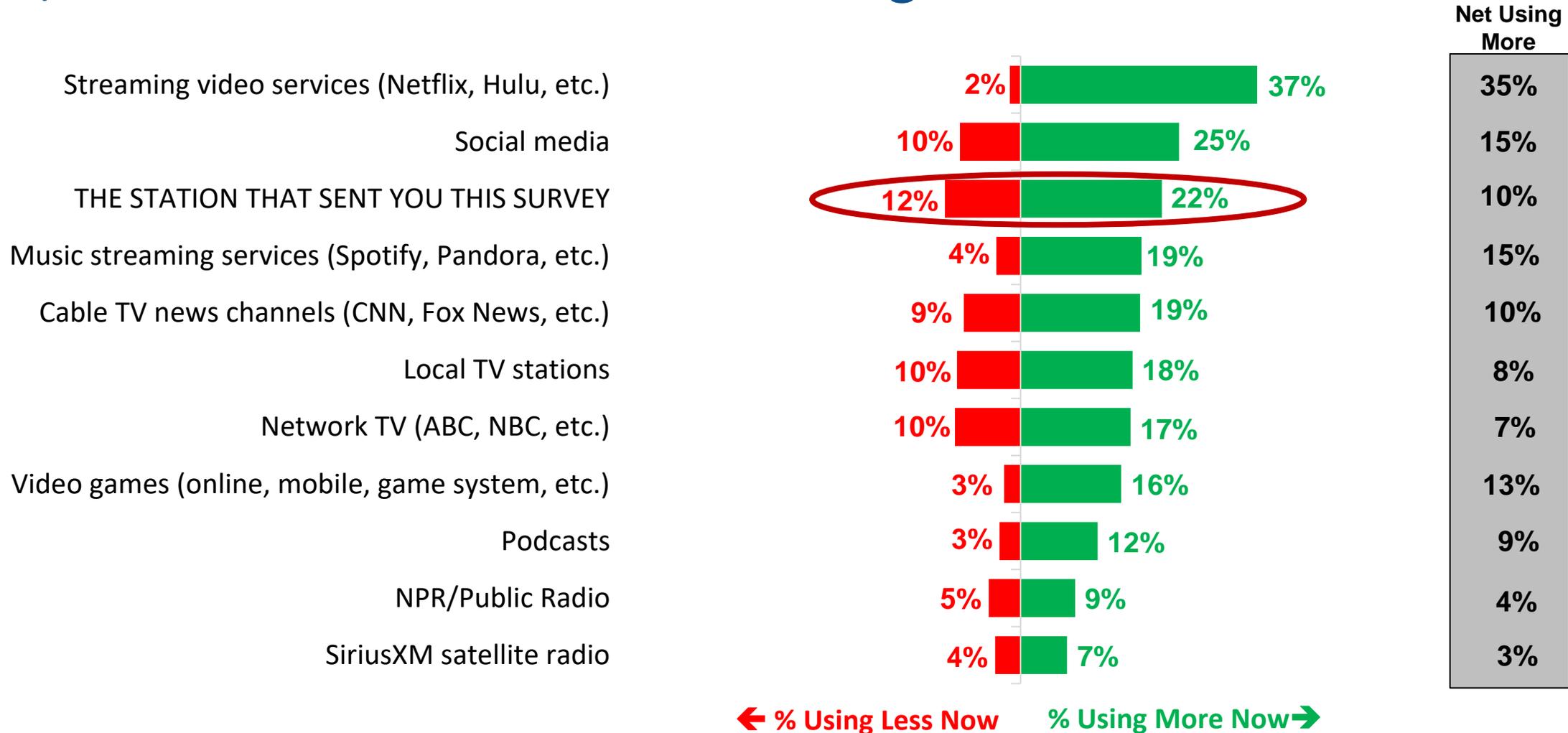
% Who Are Doing Only Some/Few/None of Their Pre-COVID Activities



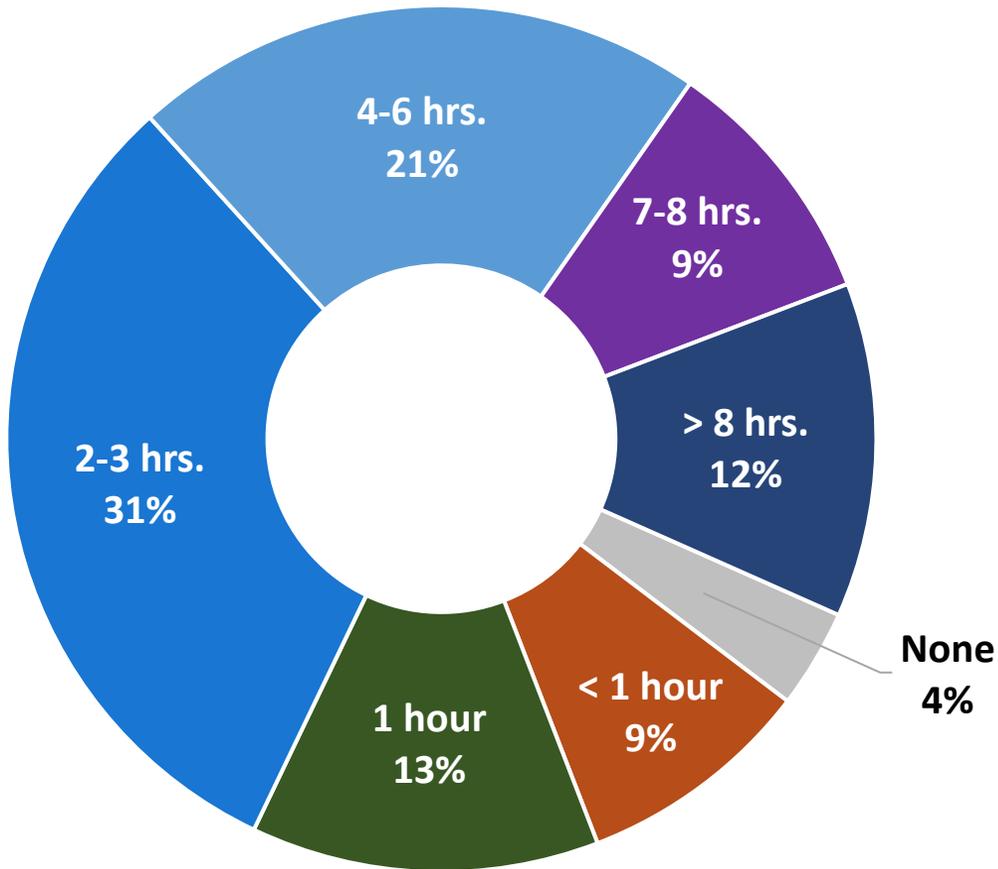


**Since COVID, radio listening among its biggest fans appears to be down (but it was heading that way pre-pandemic)**

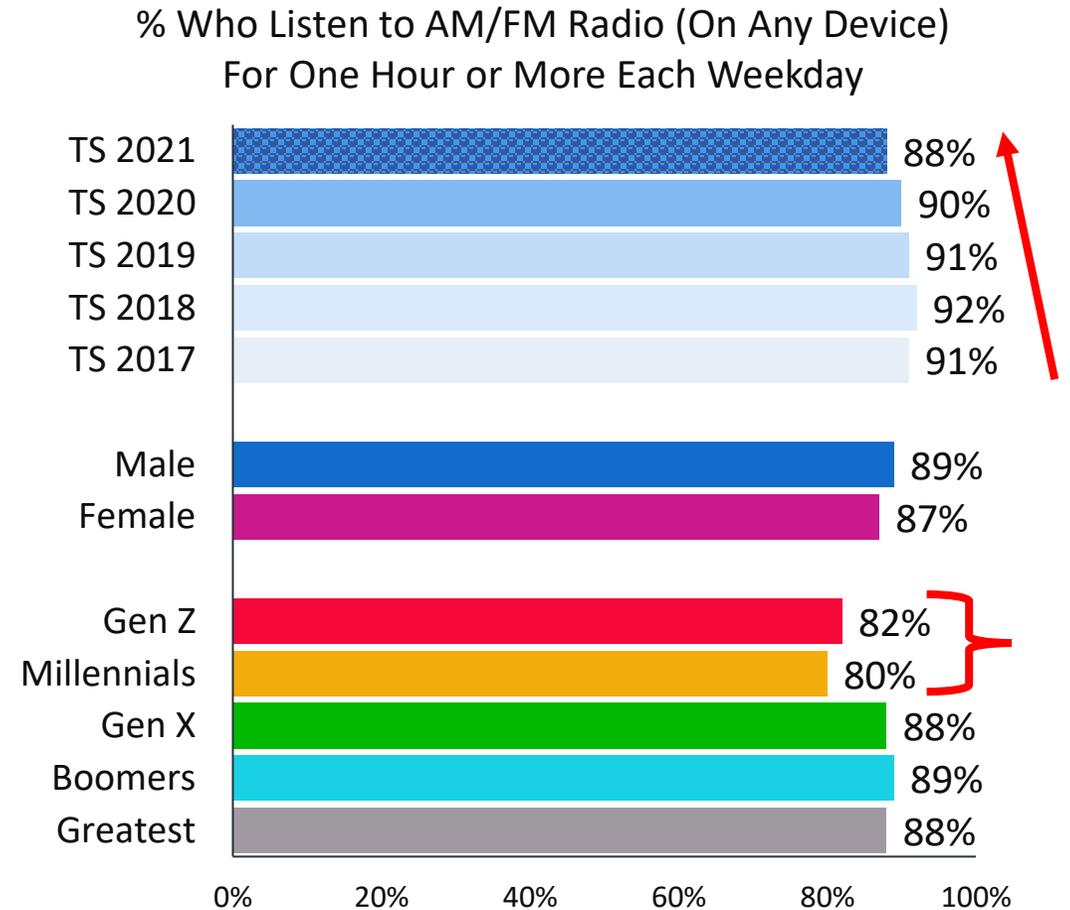
# P1 Station Listening Is Up Since COVID; Streaming Video, Internet Use, Social Media & Music Streaming Show Solid Gains



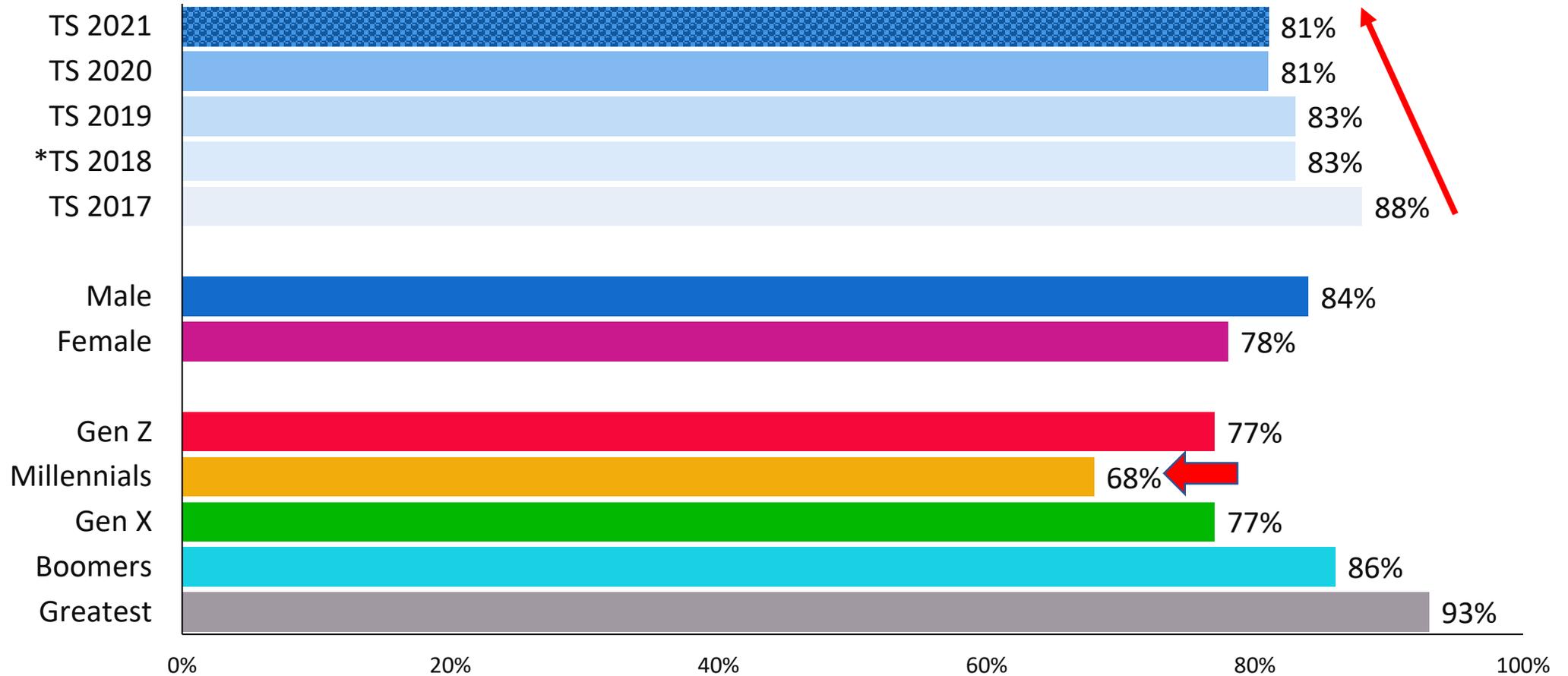
# AM/FM Radio Listening Is Gradually Trending Down, Lowest Among the Youngest Generations



*“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



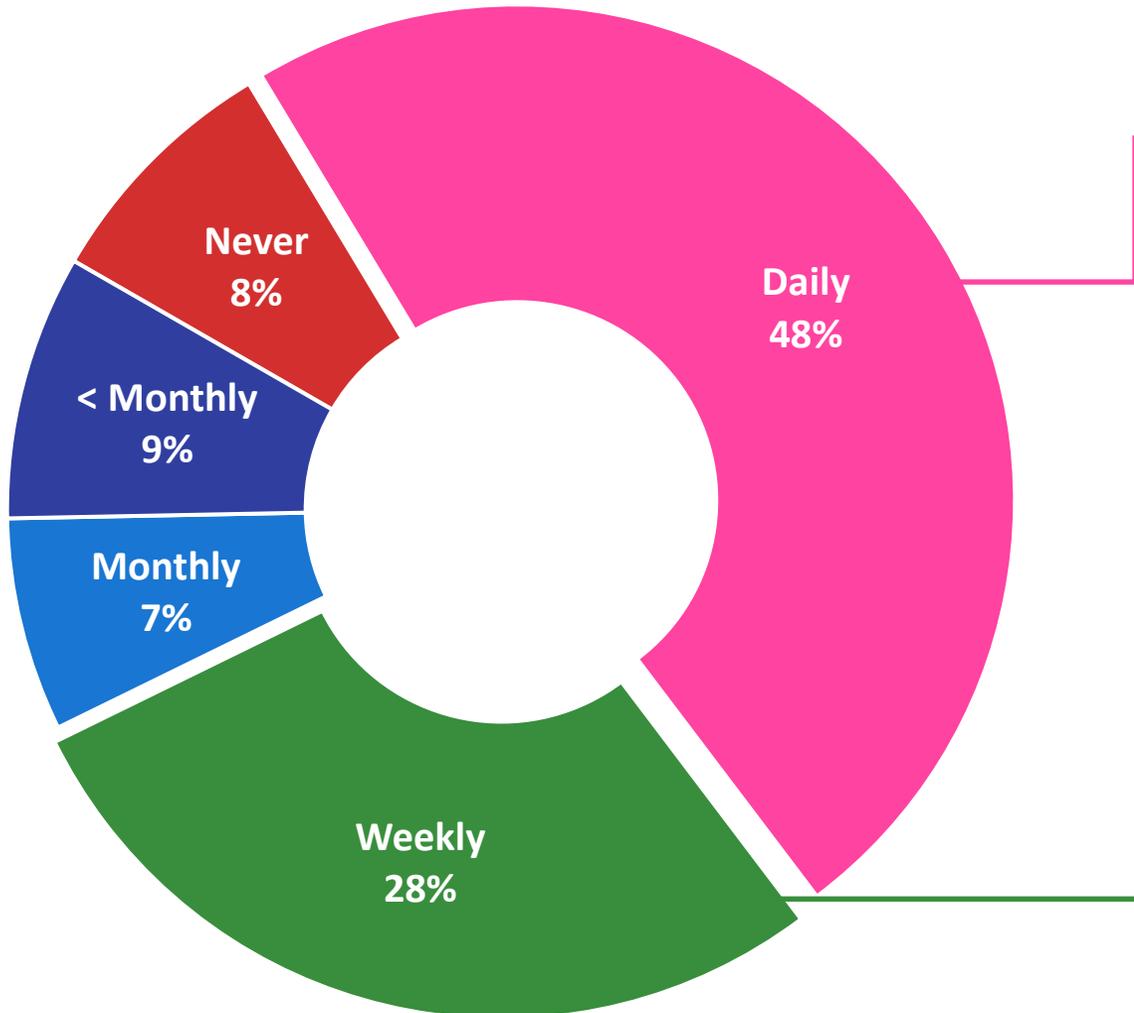
% with a regular radio in working condition where they live that they use\*

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

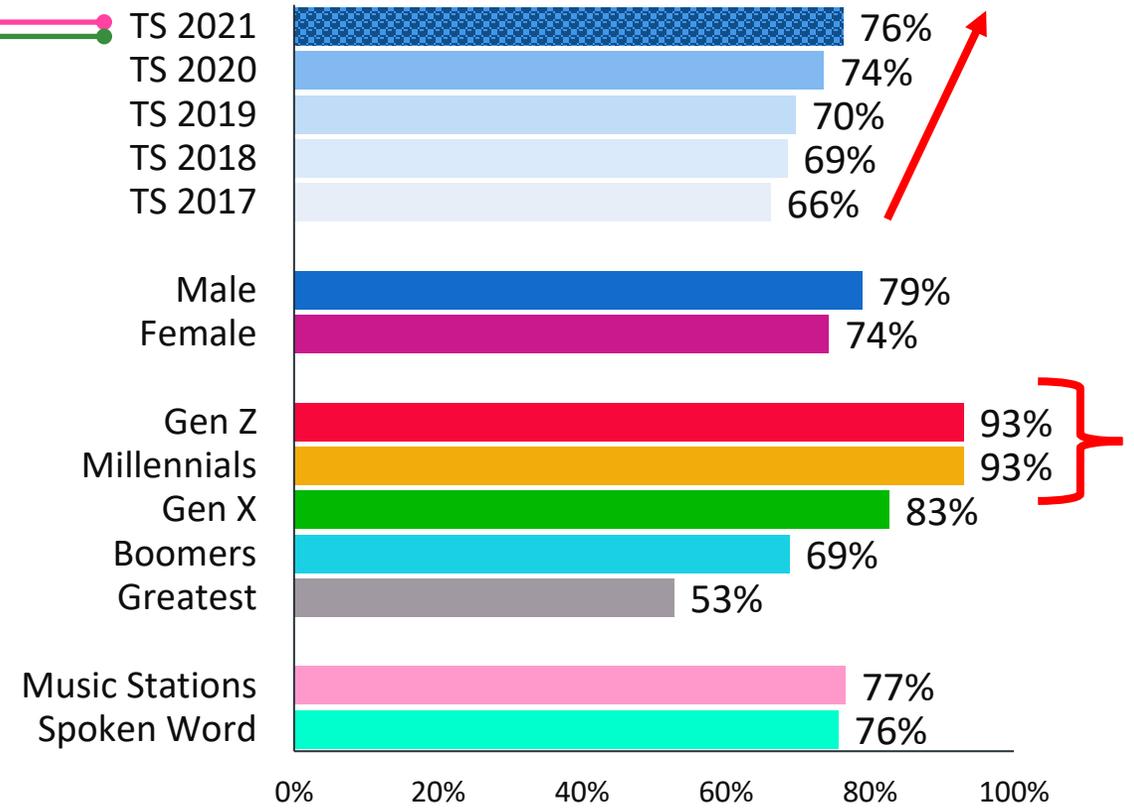


**Audio & video  
streaming reach  
new levels**

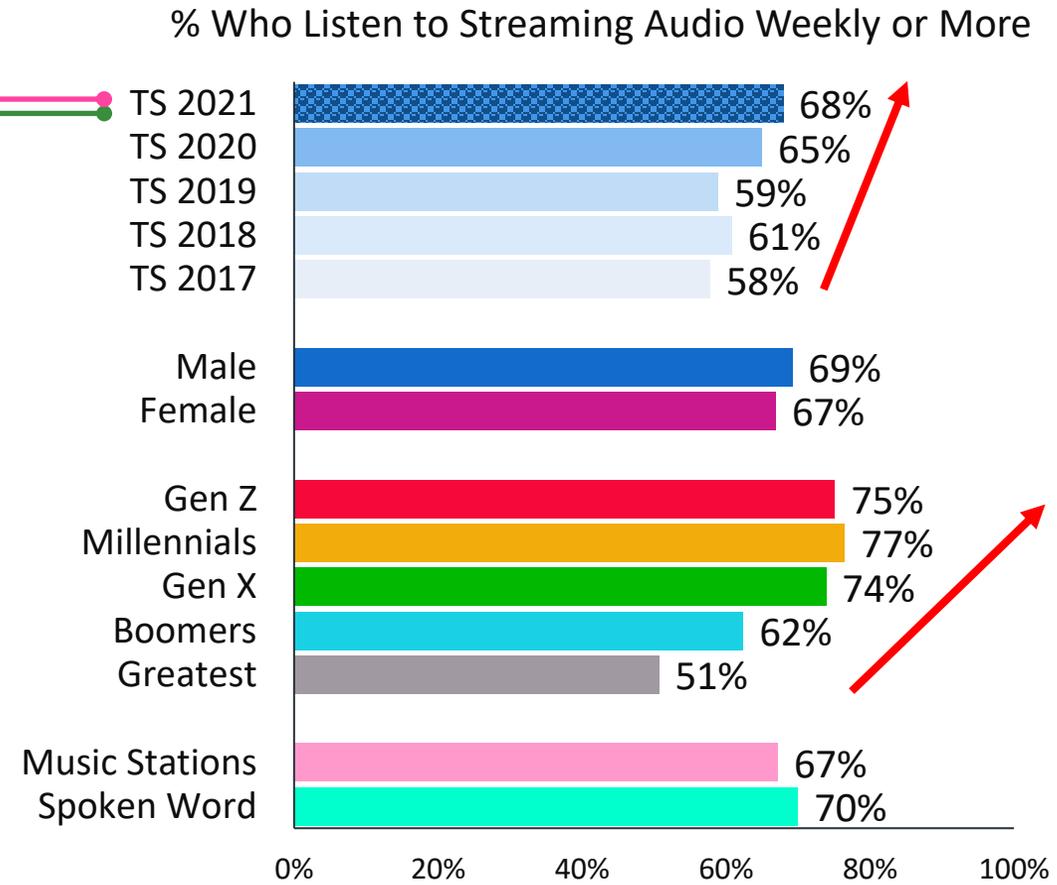
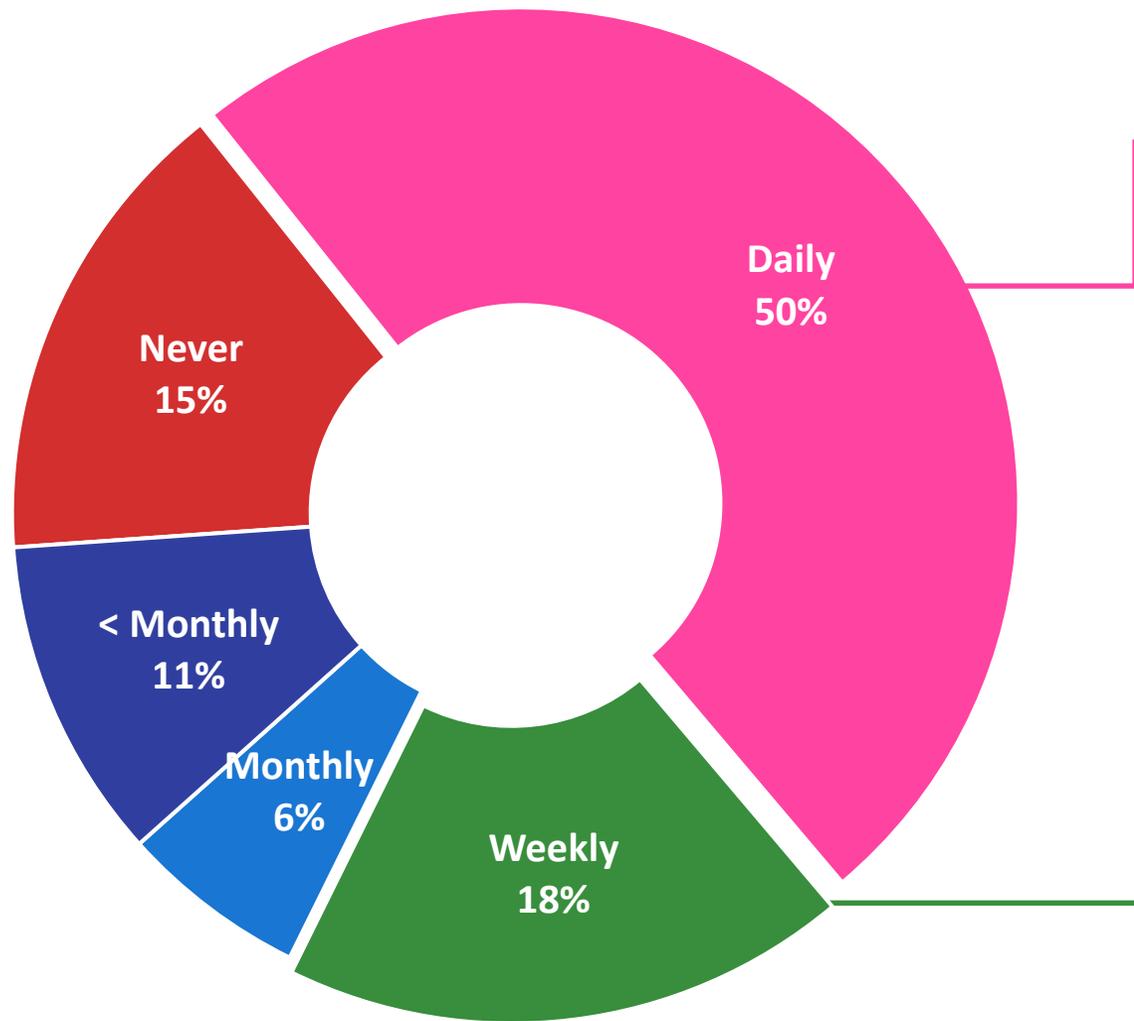
# Almost Half Watch Streaming Video Daily; Weekly Usage Grows to More Than Three in Four



% Who Watch Streaming Video Weekly or More

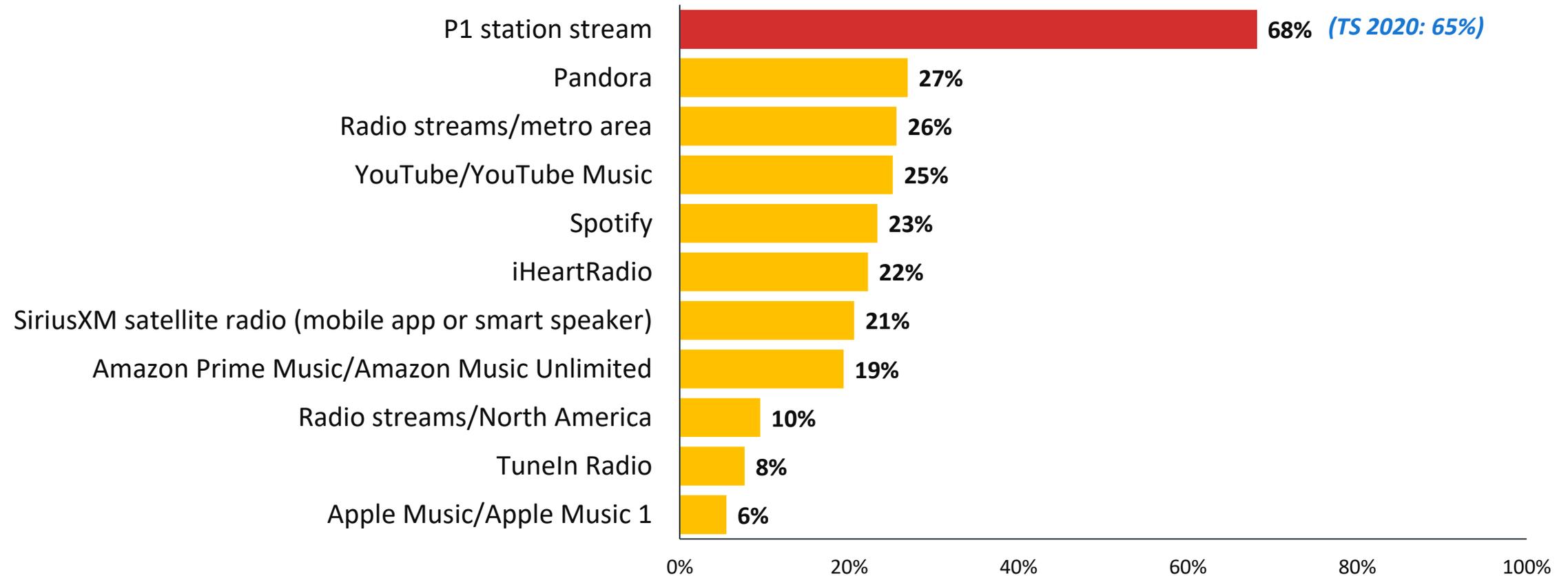


# Half Listen to Streaming Audio Daily; Weekly Usage Continues Its Growth, Skewing Young



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

% Who Listen to Each Streaming Audio Platform Weekly or More



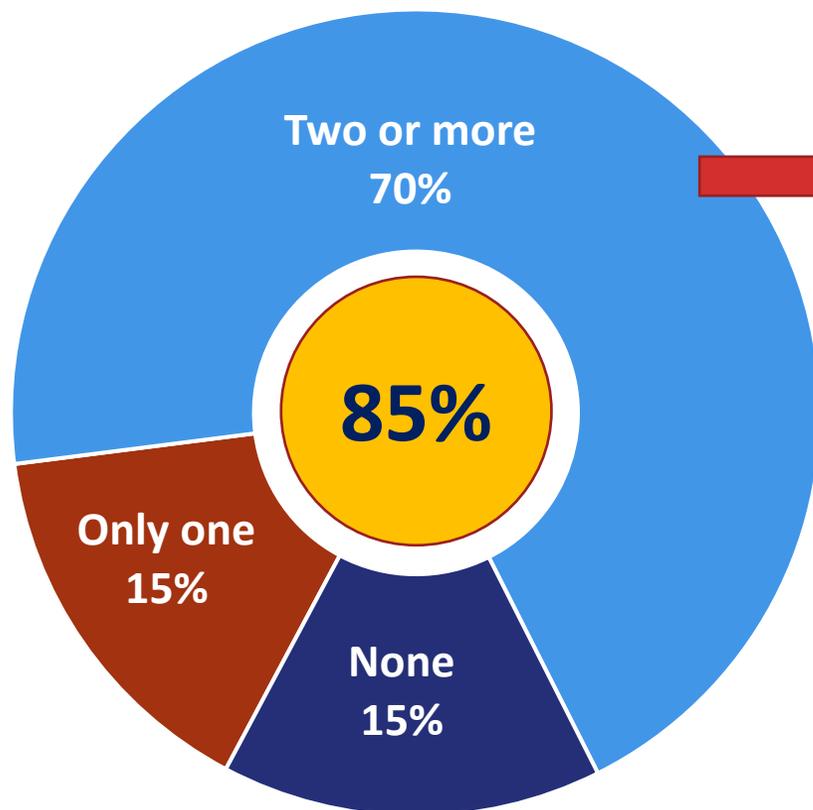
Among those who listen to streaming audio monthly or more (platforms 6% or greater shown)



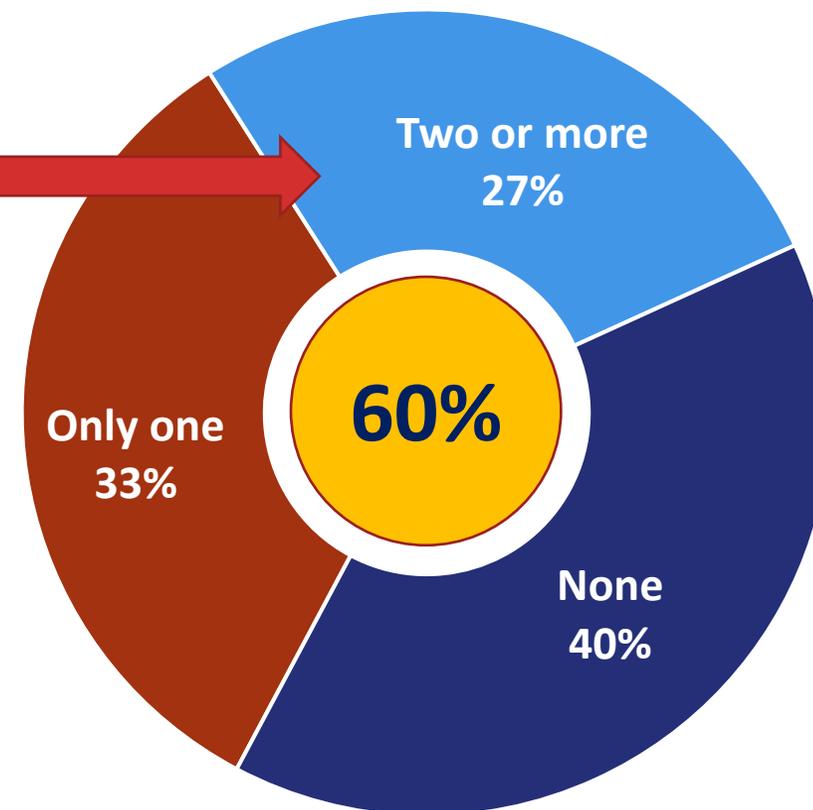
Increasingly,  
consumers  
are paying for  
audio/video  
content

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

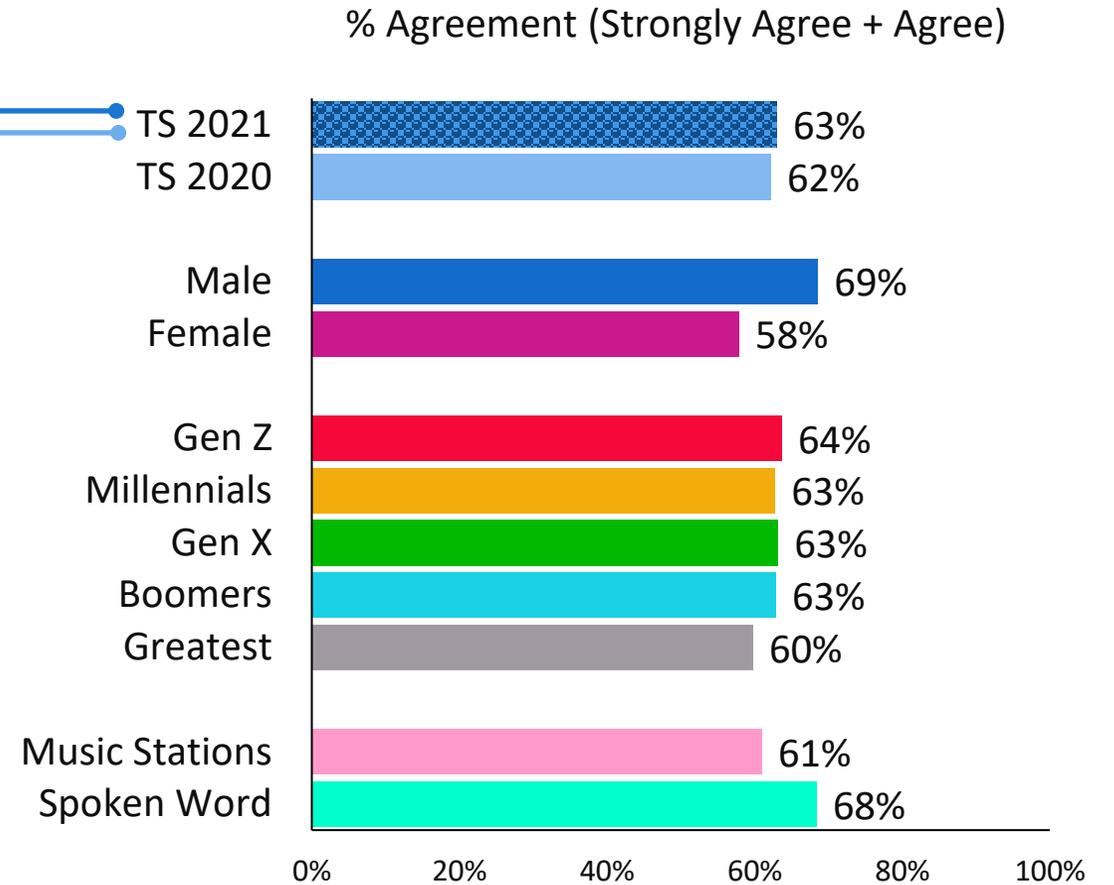
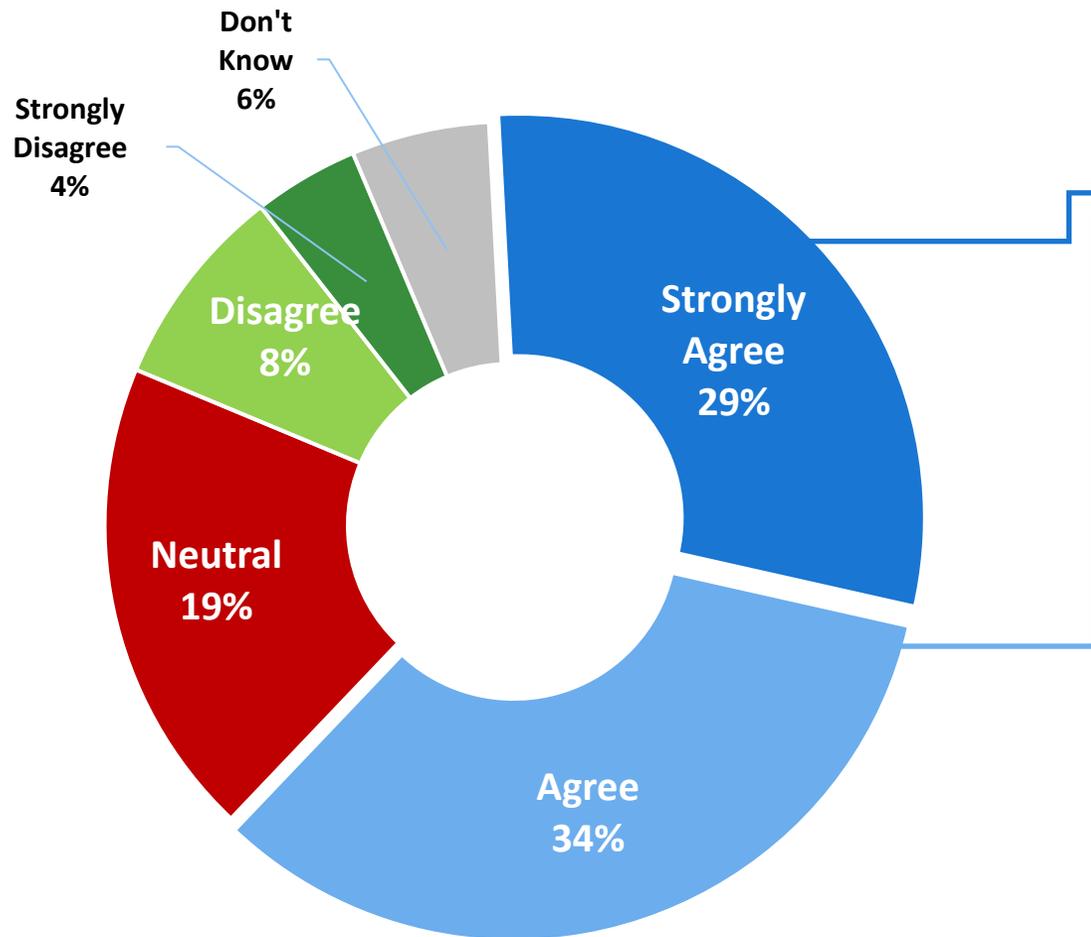
Paid **VIDEO** Streaming Subscriptions



Paid **AUDIO** Streaming Subscriptions



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

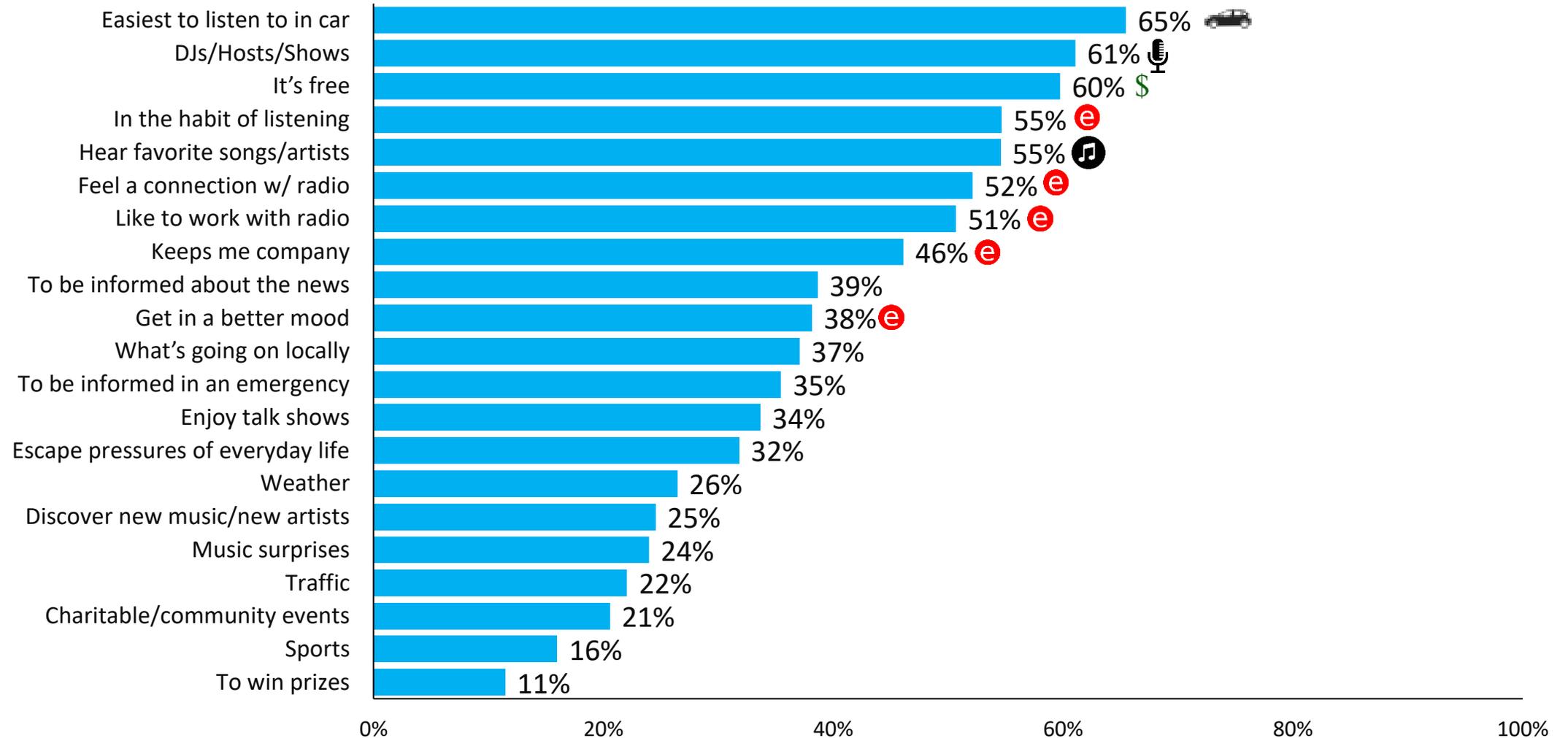


*"I am concerned about the growing number of subscription fees I'm paying for media content"*



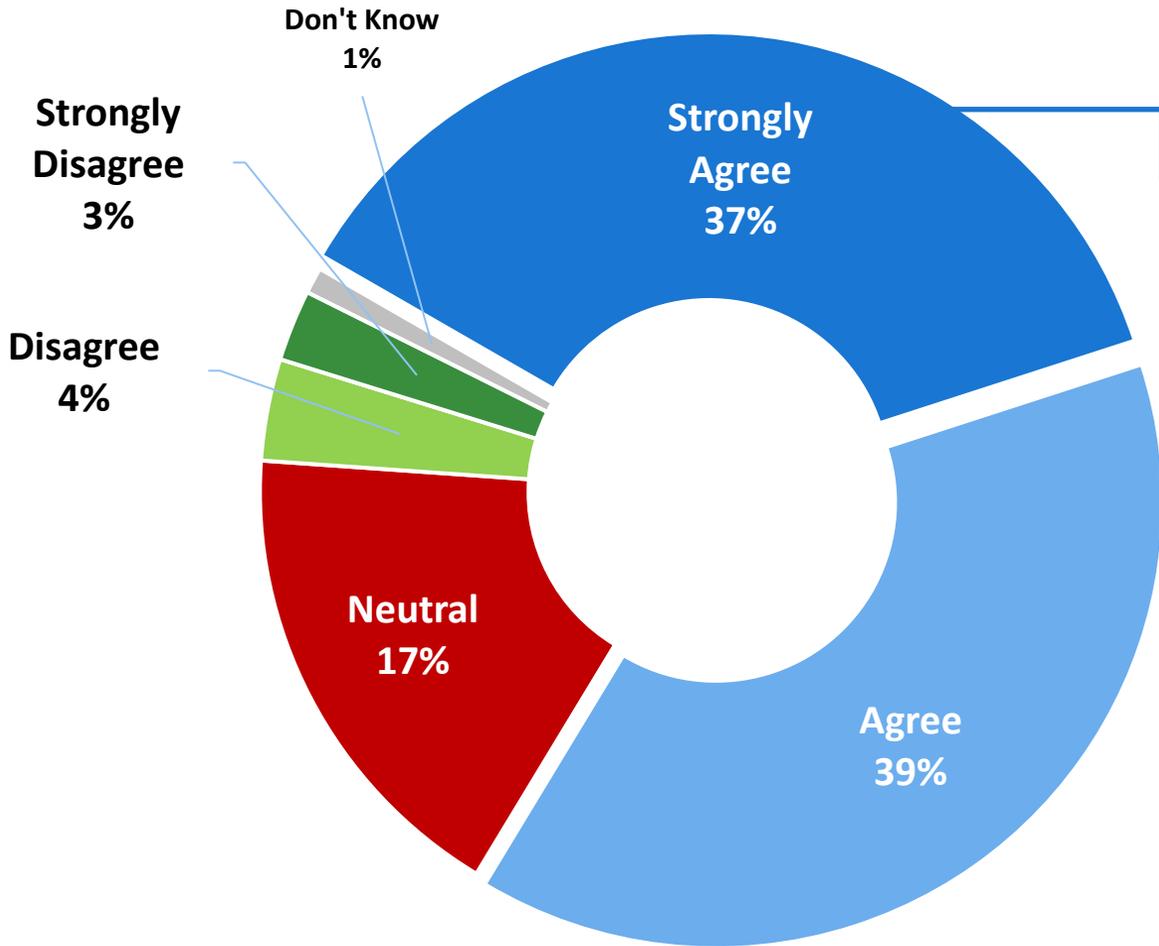
**Since COVID, radio's appeal is more emotionally driven, local, & P1 focused**

# Why AM/FM Radio?

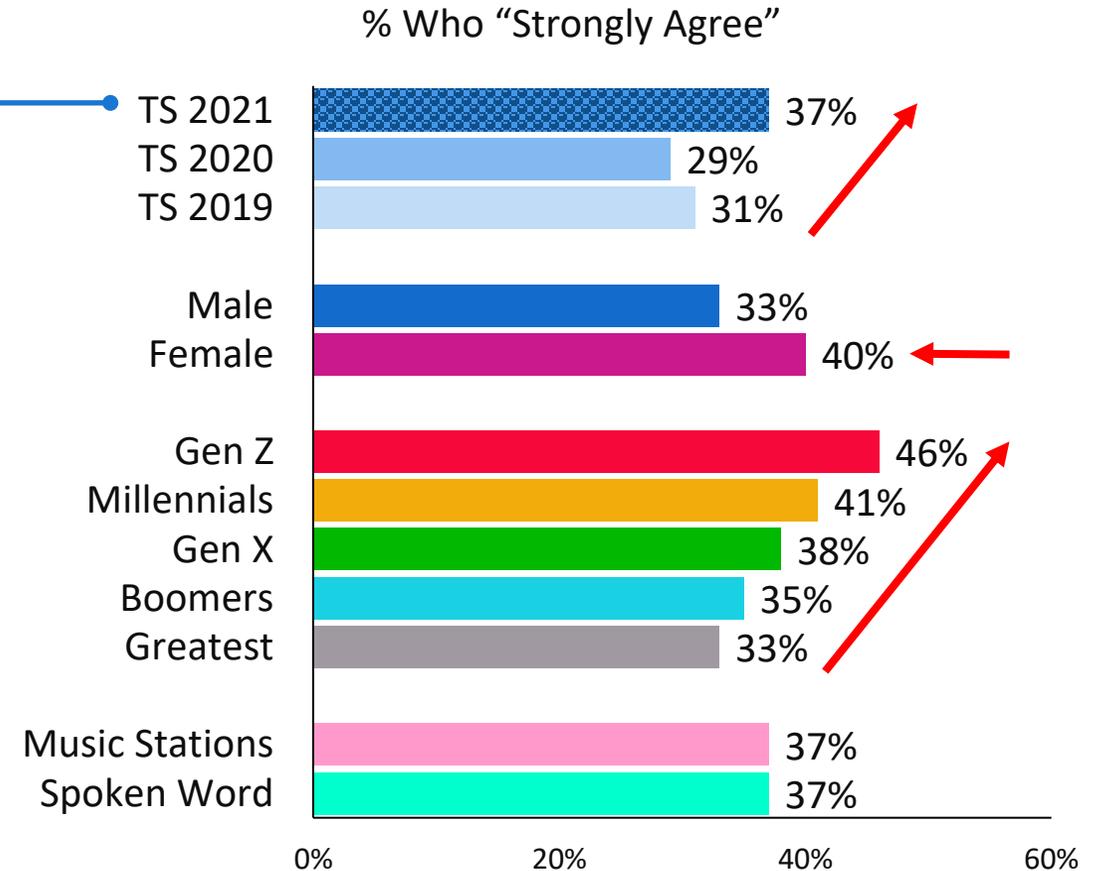


Among those who listen to AM/FM radio, % who say this is a main reason they listen

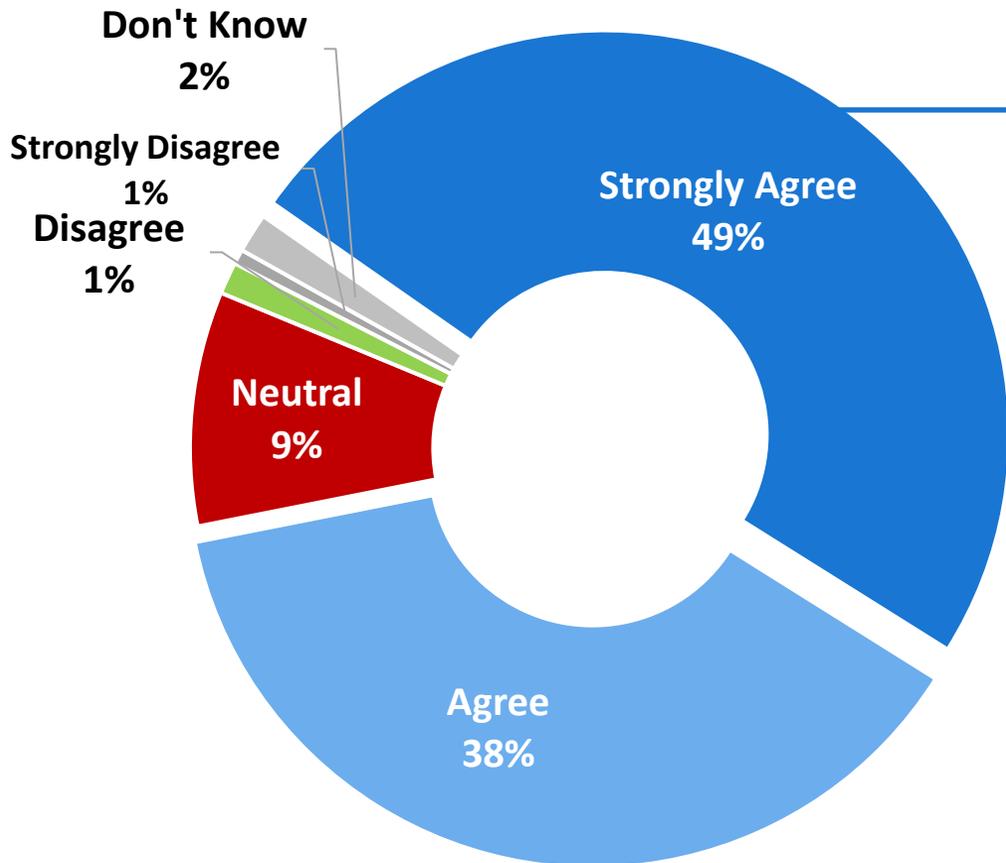
# Especially During COVID, Respondents Feel a Connection to Their P1 Station



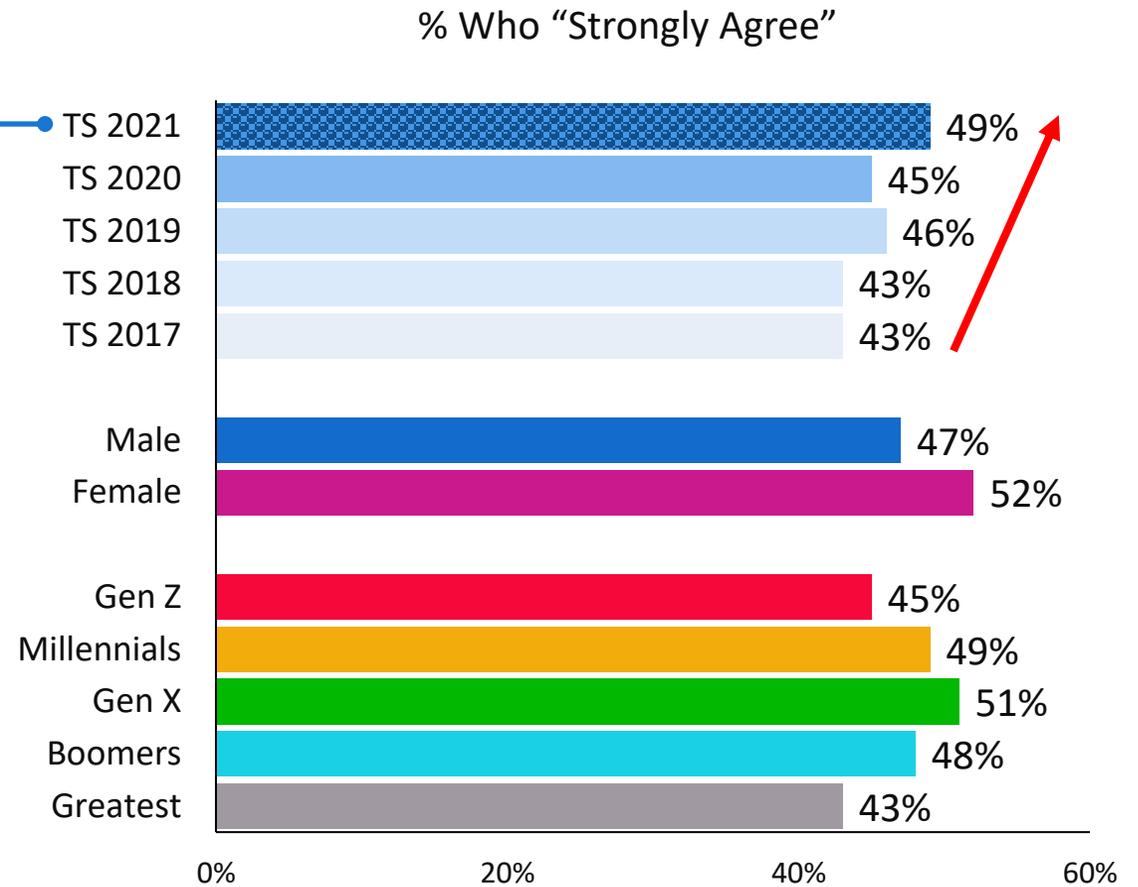
*"I really feel a sense of connection to  
THE STATION THAT SENT ME THIS SURVEY"*



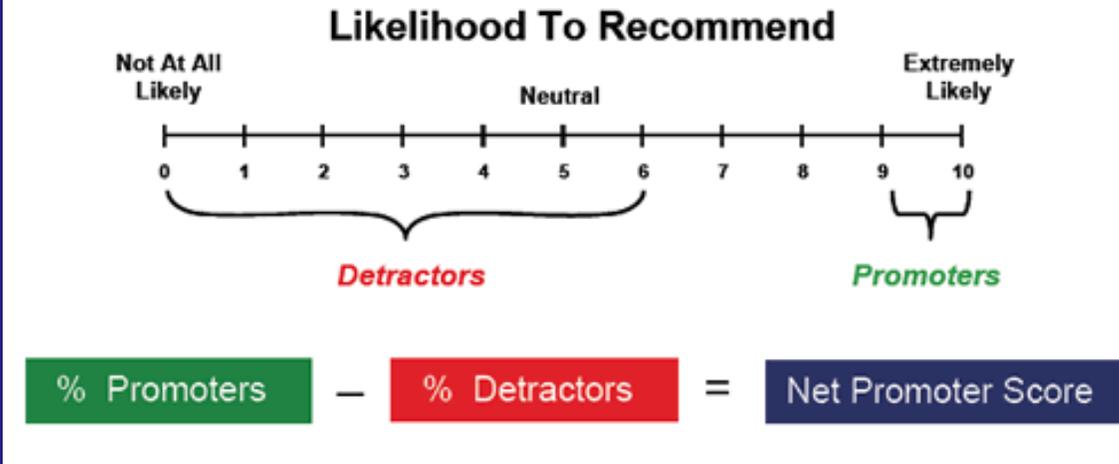
# A Near Majority Strongly Agrees Its Local Orientation Is a Primary Advantage For Broadcast Radio



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

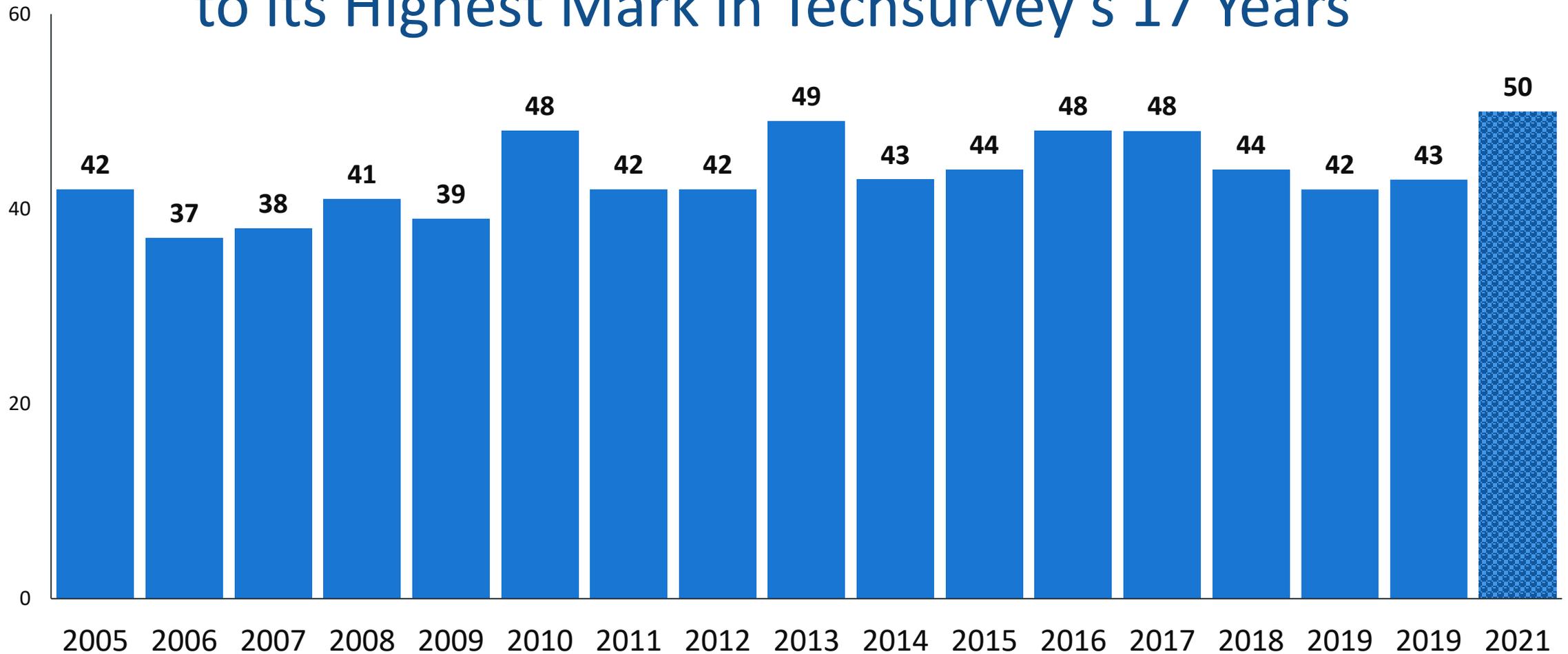


# NET PROMOTER

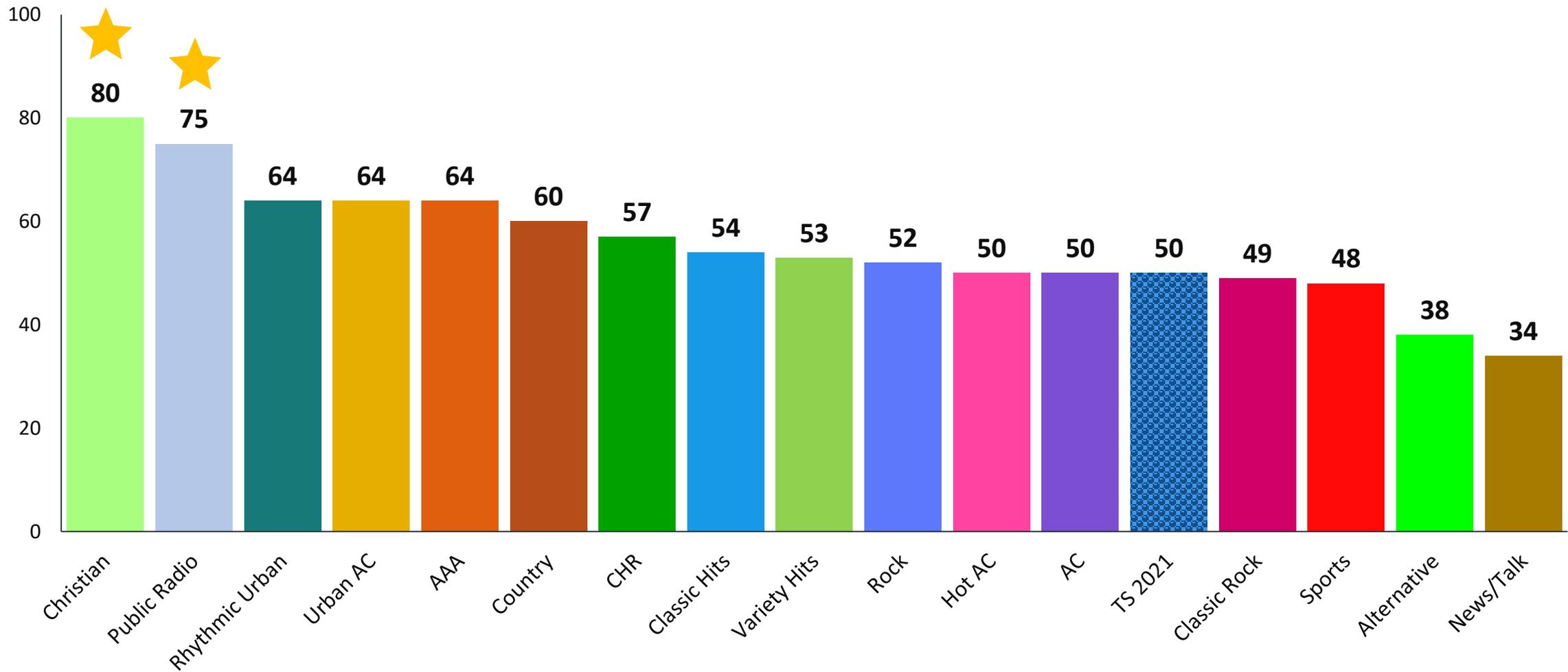


Radio's word-of-mouth scores (Net Promoter) have never been stronger

# 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

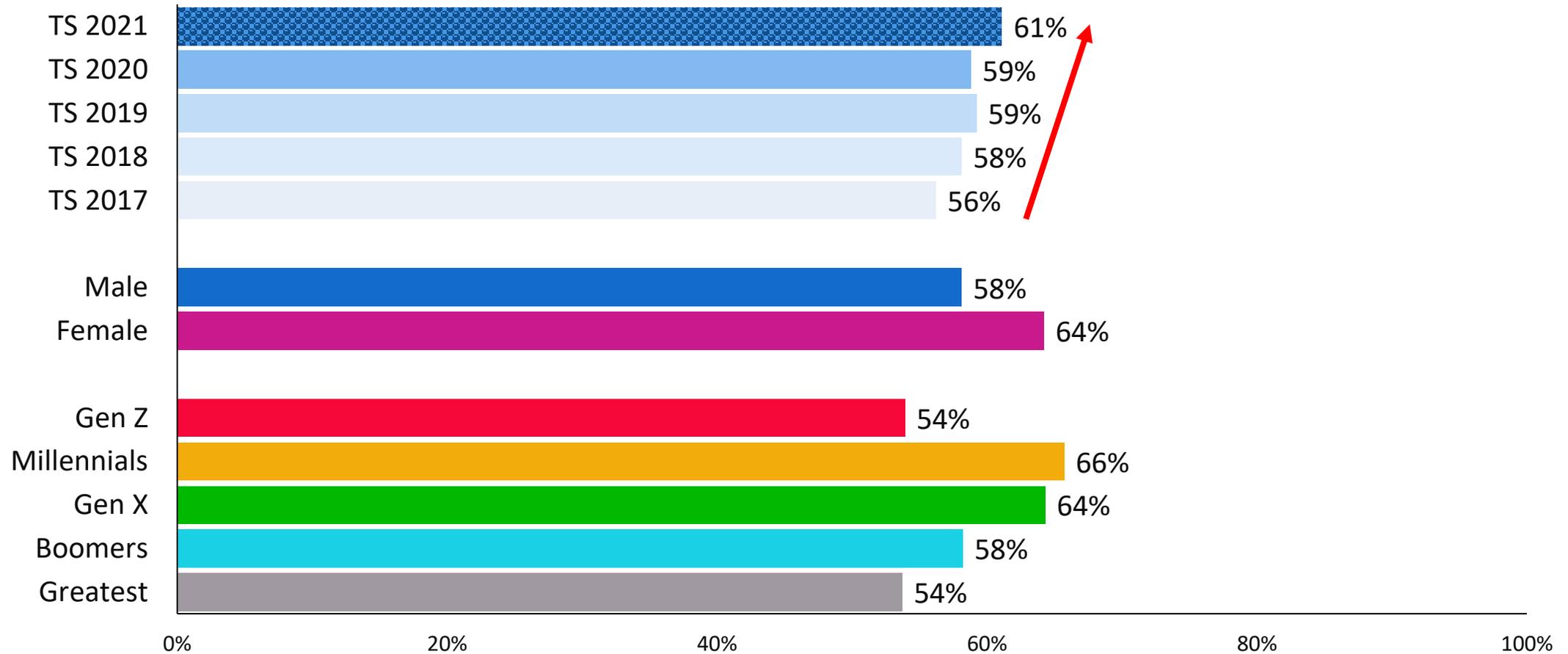




**The appeal of  
radio's hosts is  
beginning to  
overshadow its  
music**

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

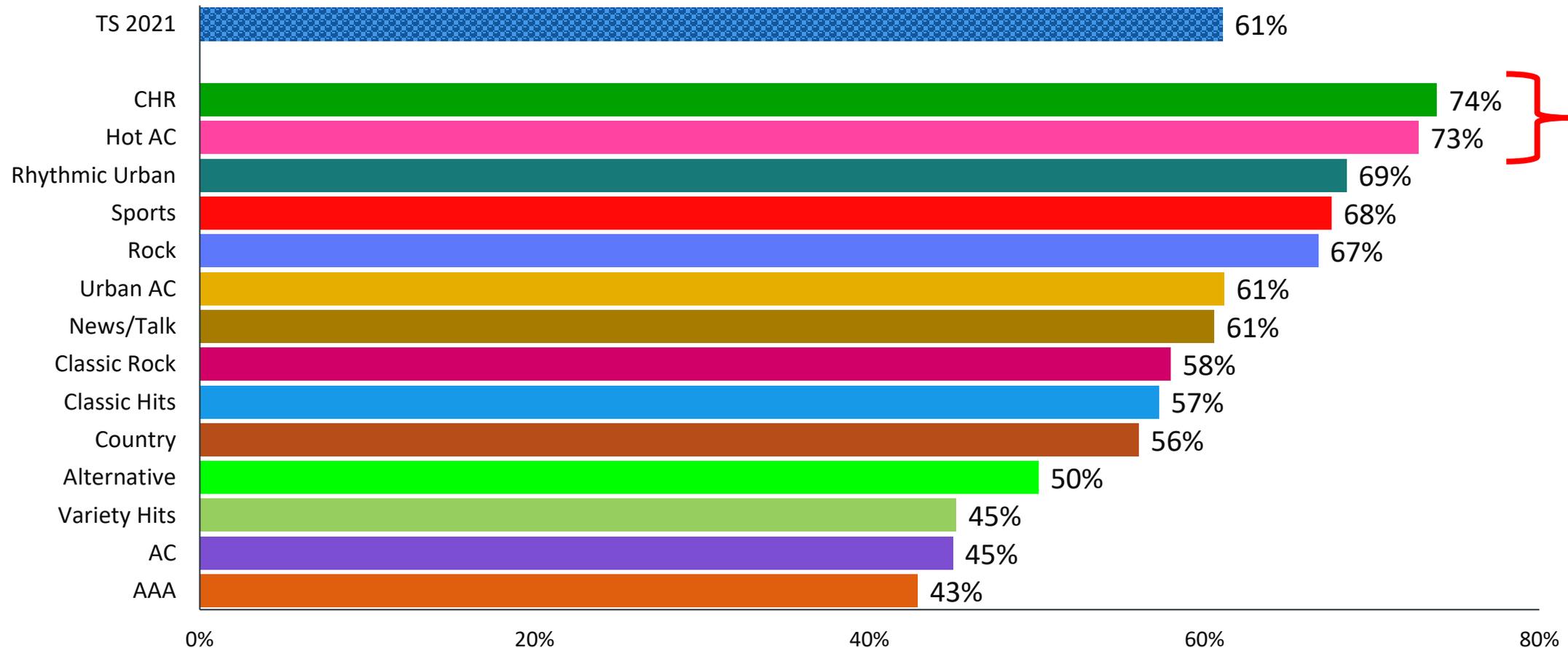
*“I Like Particular DJs, Shows, or Hosts”*



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

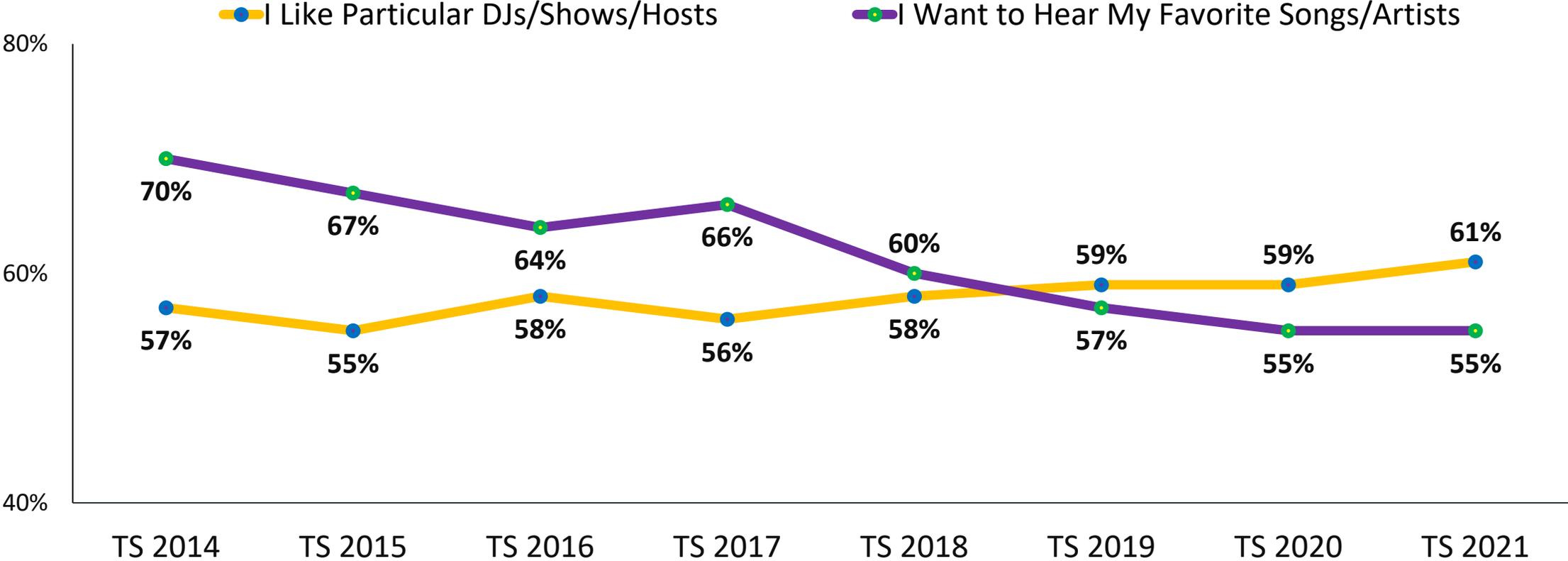
# CHR & Hot AC Fans Value Personalities on Radio the Most

*"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



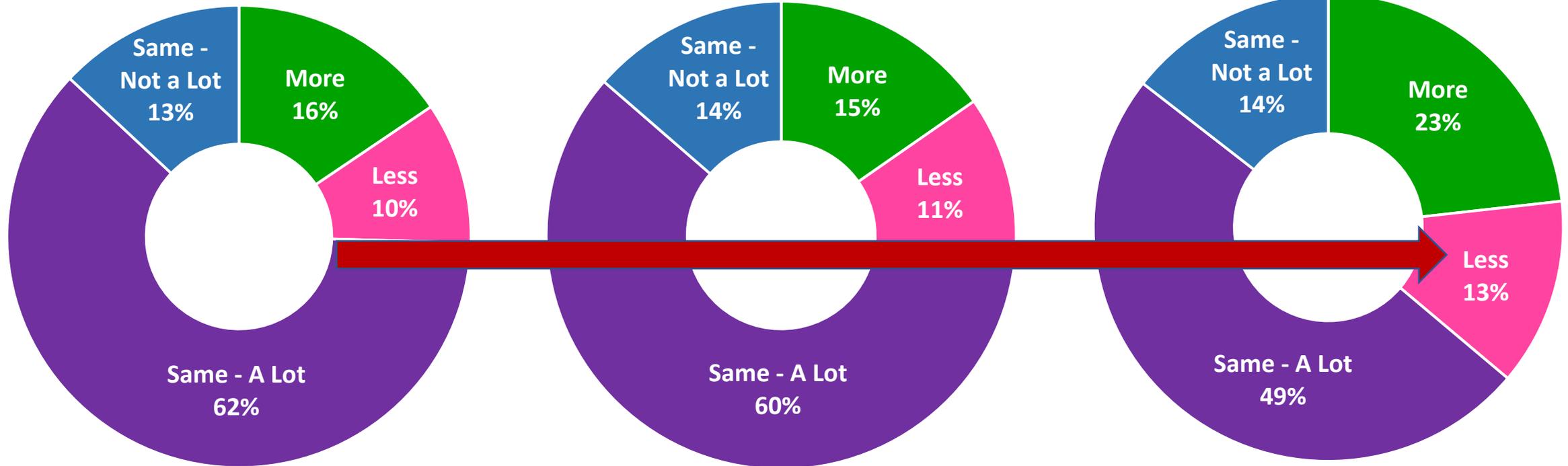
Why less  
radio  
listening?  
More time at  
home, less  
time in cars

# AM/FM Radio Listening Momentum in the Past Year

TS 2019

TS 2020

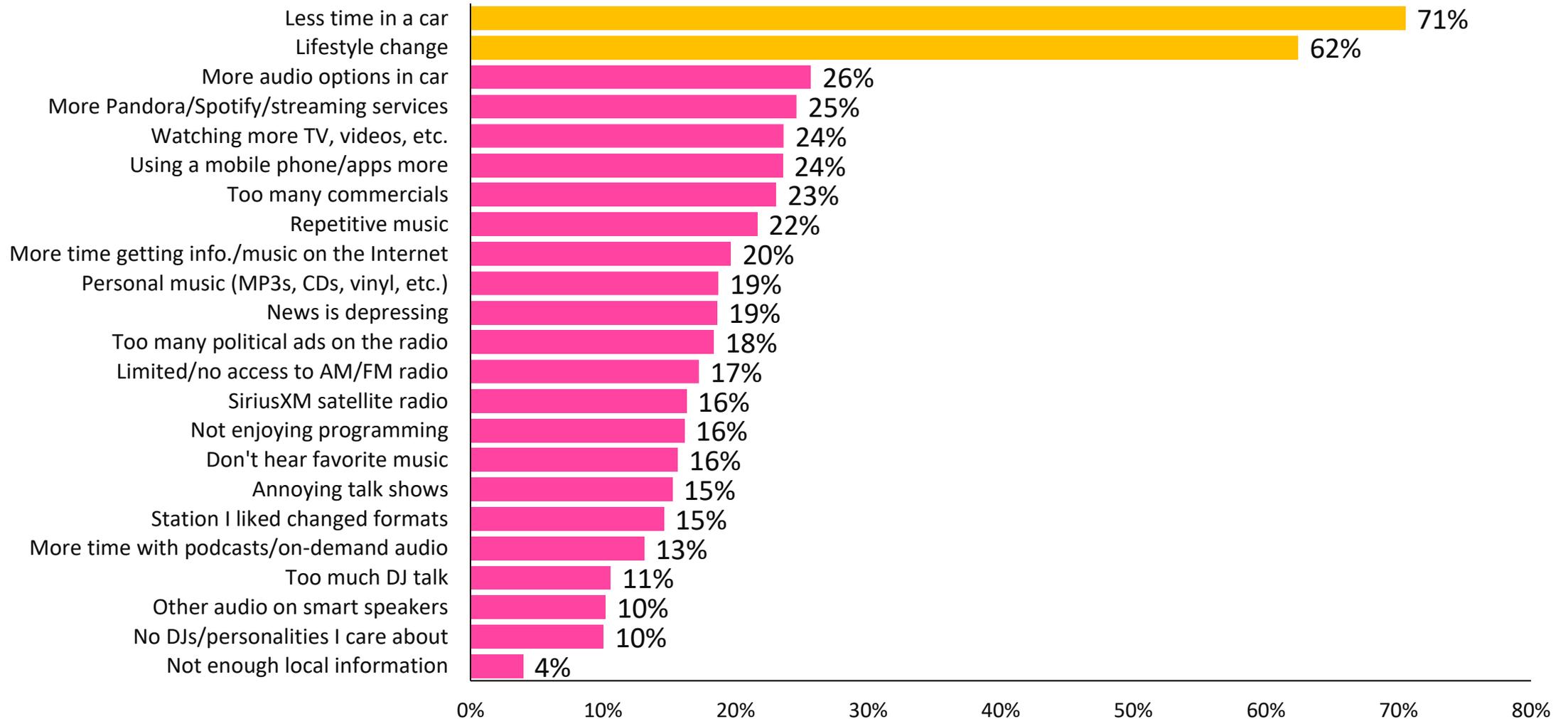
TS 2021



Among those who listen to AM/FM radio

# Why Listening Less to AM/FM Radio?

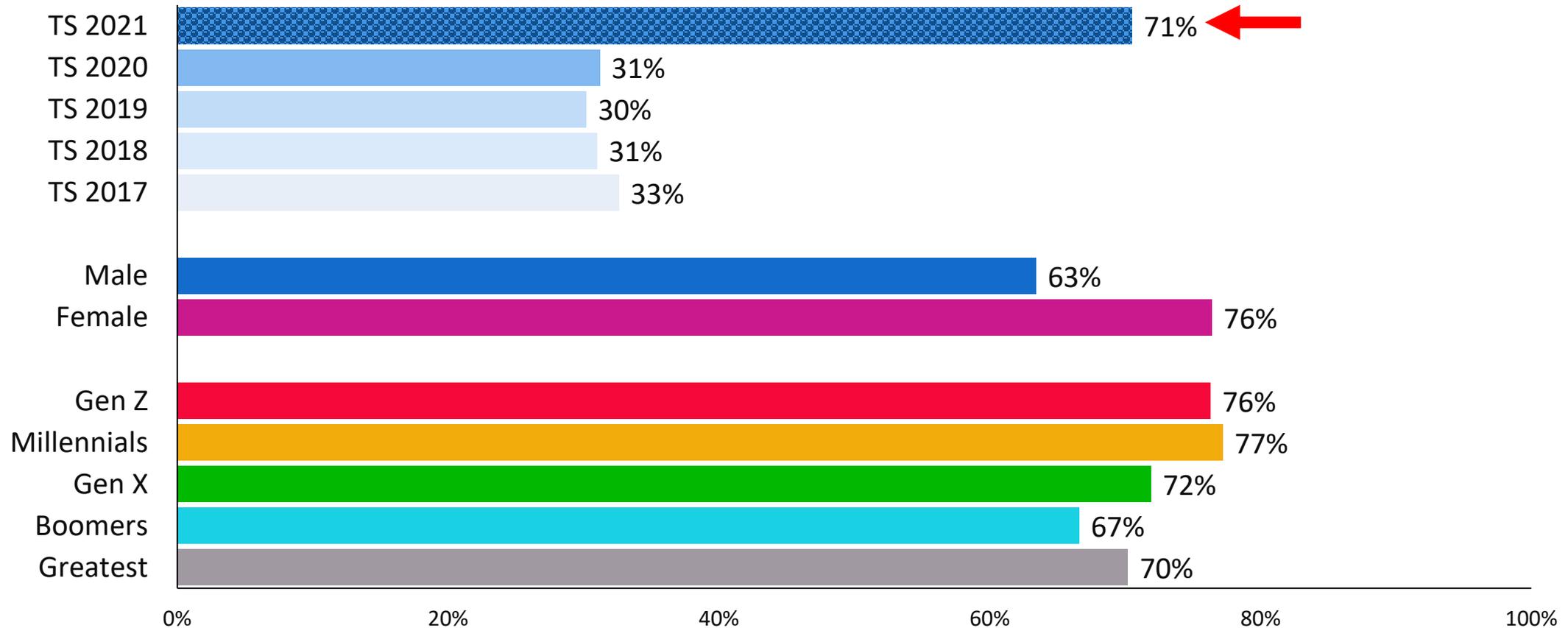
## Less Time in a Car and Lifestyle Changes Since COVID



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

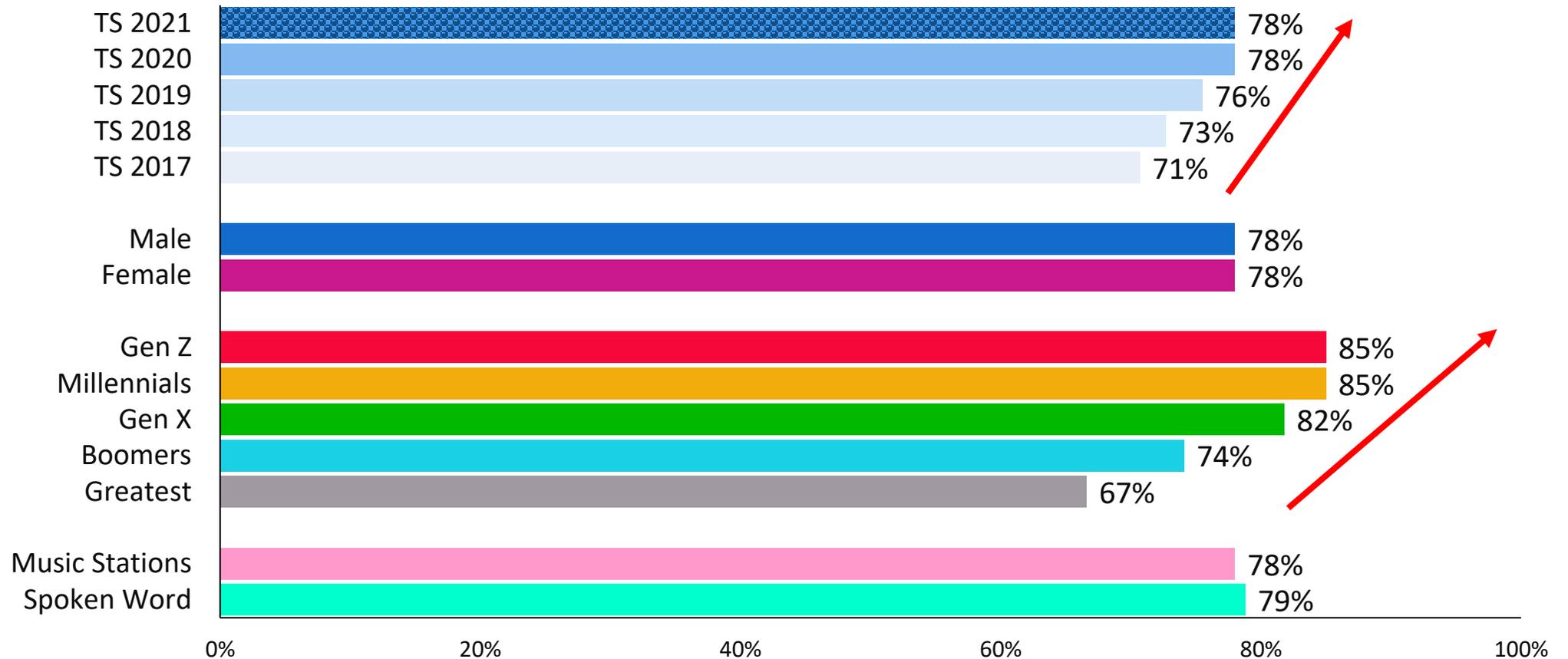
# Seven in Ten Who Are Listening Less to Radio Say Decreased Time in a Car Is a Main Reason – More Than Double Last Year’s Level

*“Spending Less Time in a Car”*



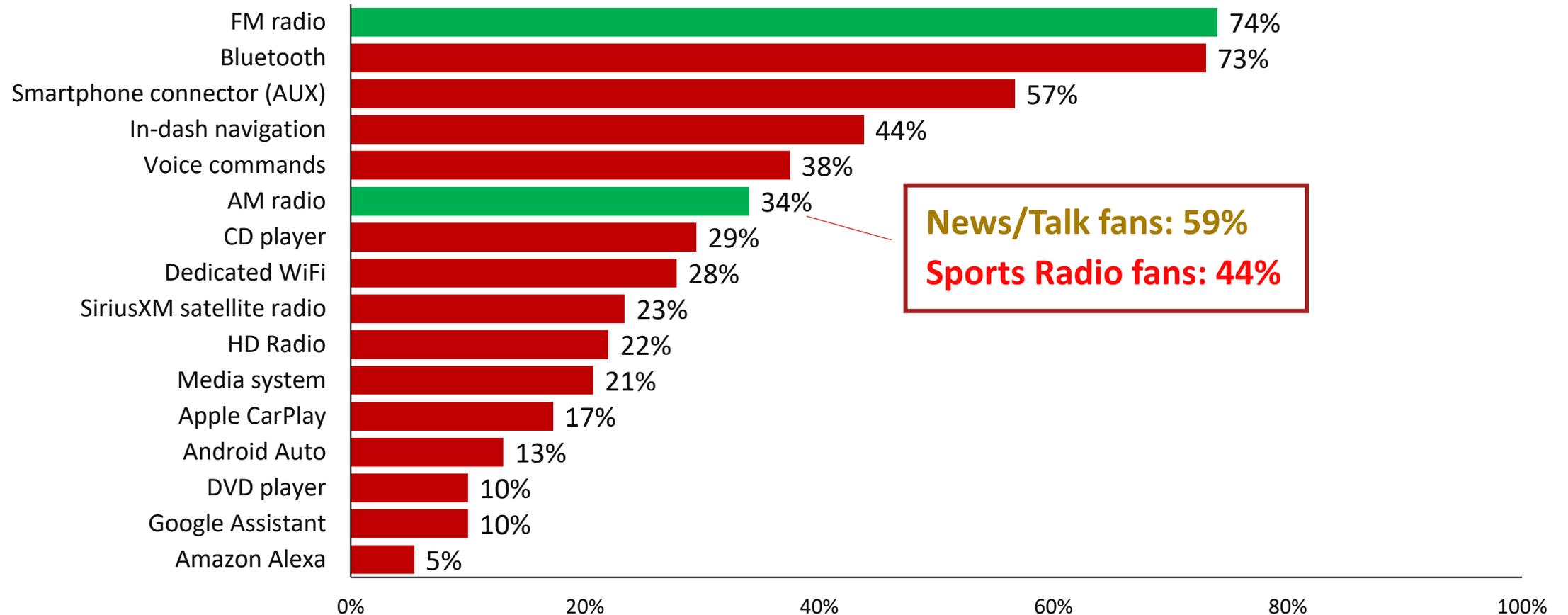
Among those who say they are listening less to AM/FM radio in the past year, % who say this is a main reason they listen less

# 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

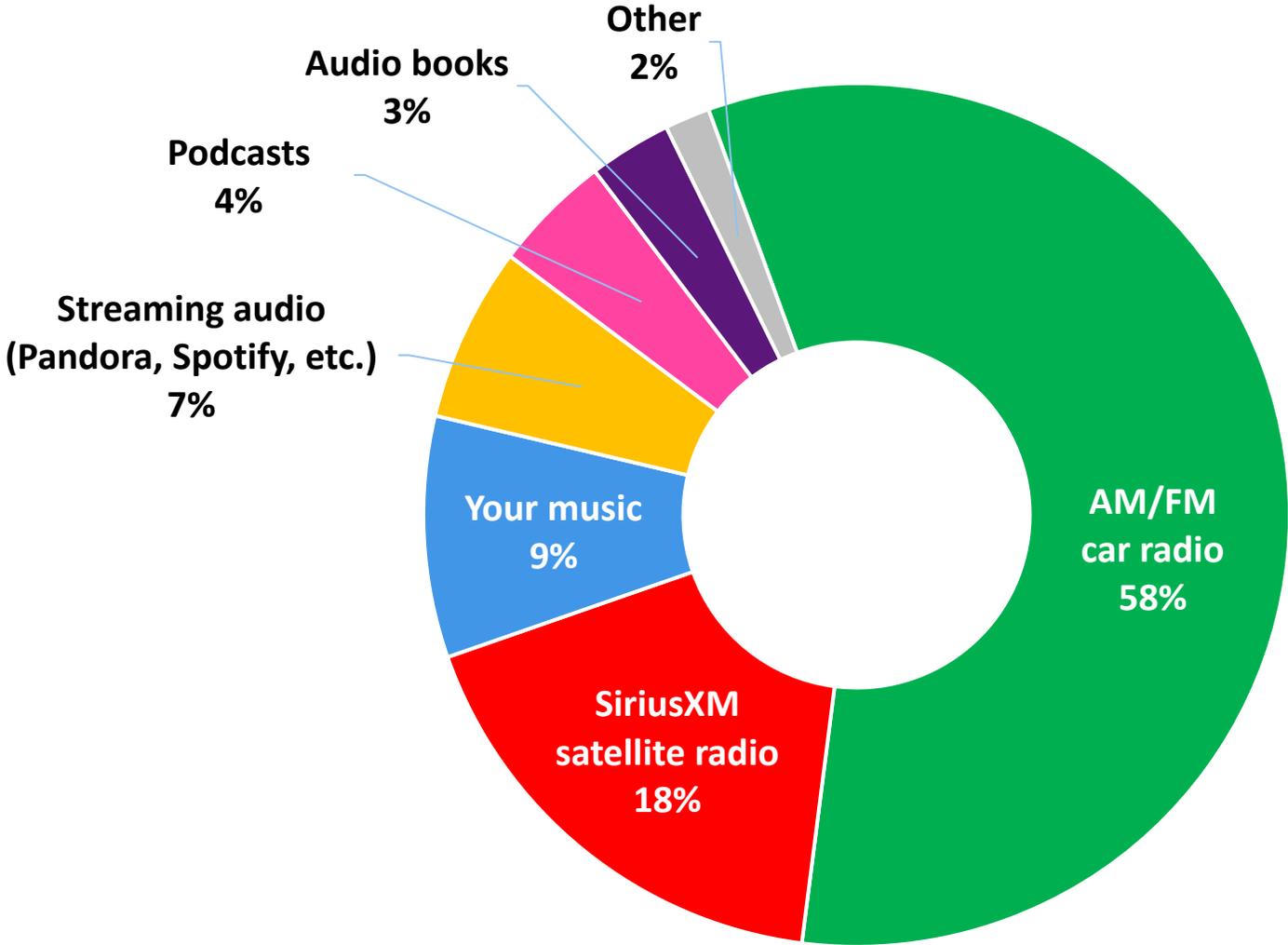
# Of Those Buying or Leasing a New Car in 2021, FM Radio and Bluetooth Are the Most Important Features



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

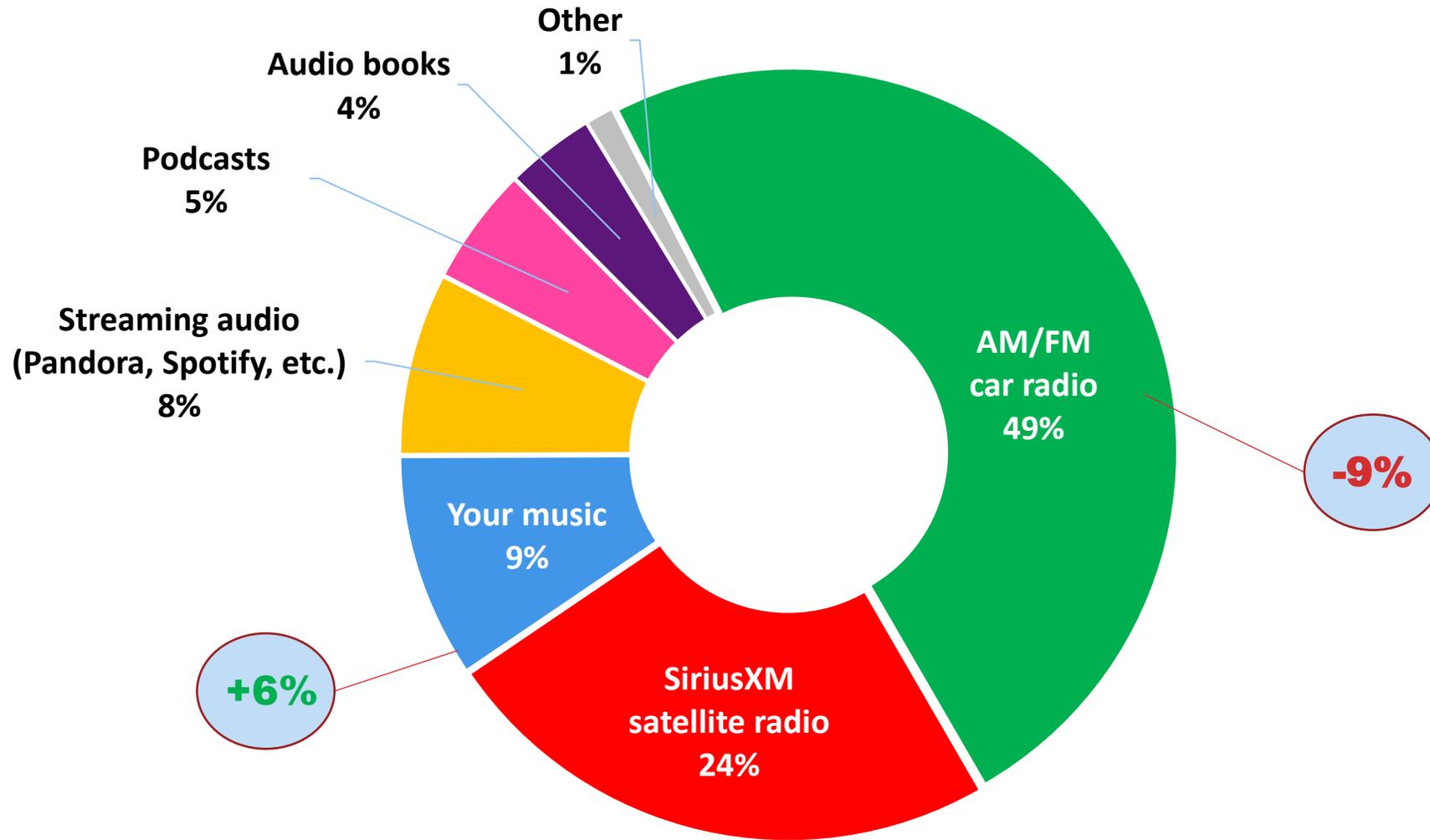
# AM/FM Radio Is the Leader For In-Car Audio Usage

**Total**



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

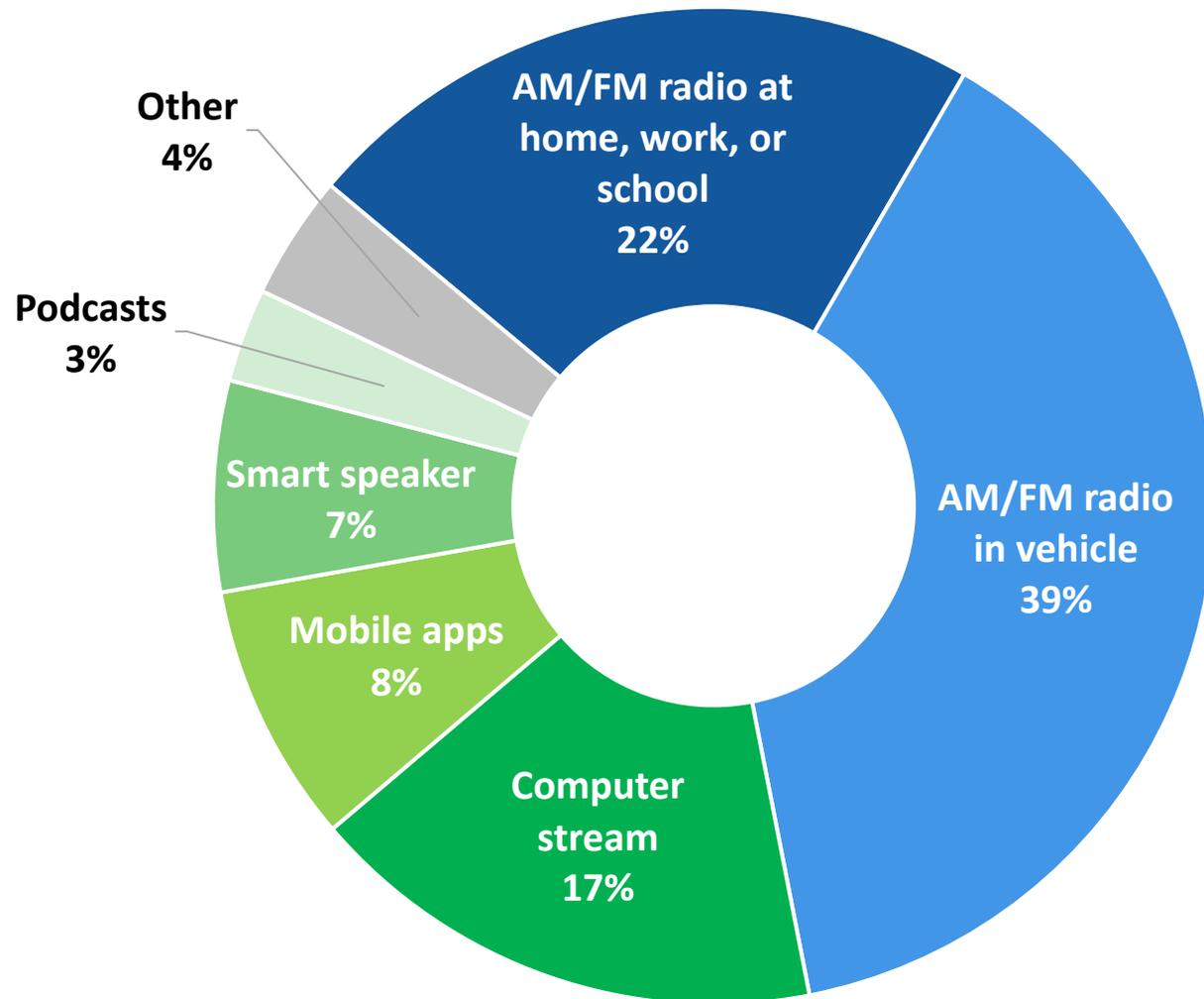
## *Own In-Car Media System*





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

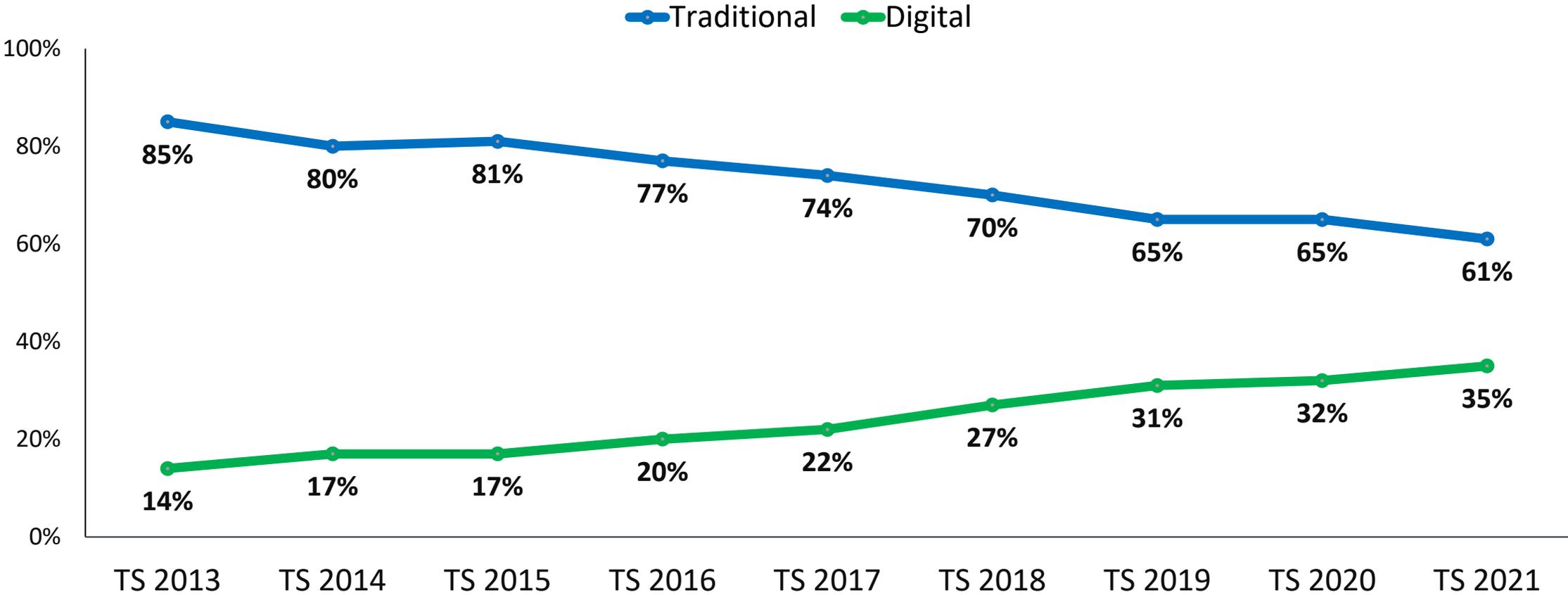
# How Do Radio Fans Listen to Their Favorite Stations?



Traditional – 61%  
Digital – 35%

TS 2020  
Traditional – 65%  
Digital – 32%

# P1 Station Listening Platform Trend: Traditional vs. Digital

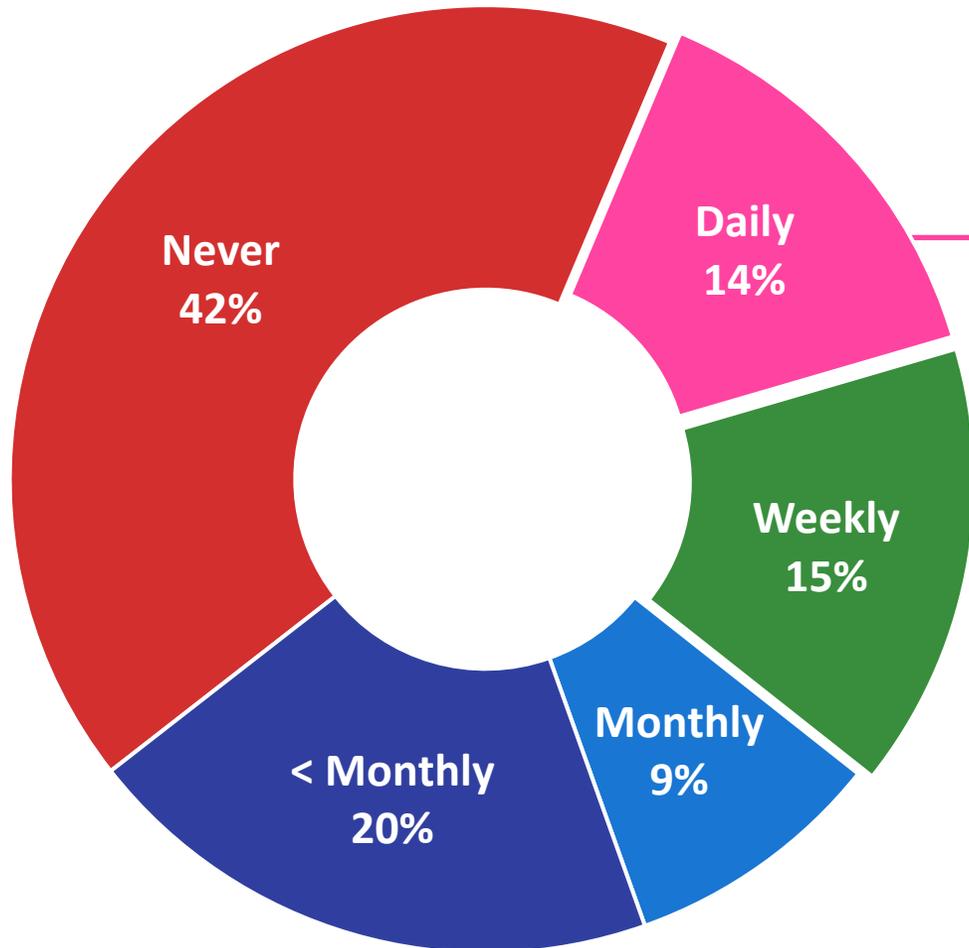


% of time spent with P1 station in a typical week via traditional platforms (an AM/FM radio at home/school/work or in a vehicle) vs. digital platforms (computer, mobile, smart speaker, podcasts)

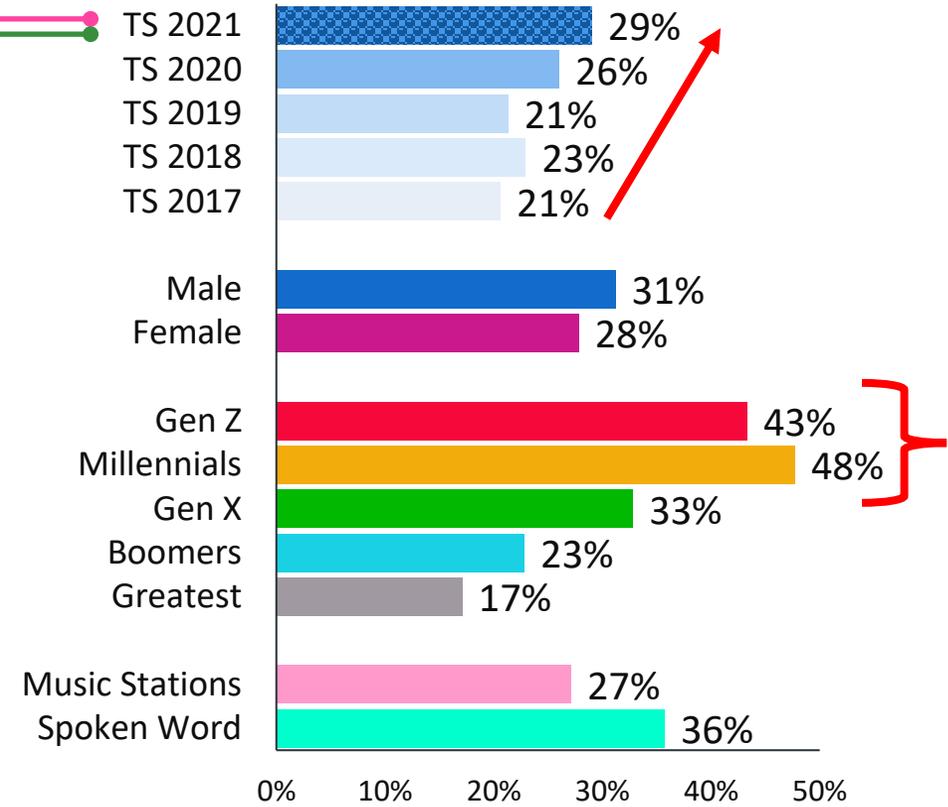


Podcasting grew during COVID, but many still don't make the platform part of their audio listening routines

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

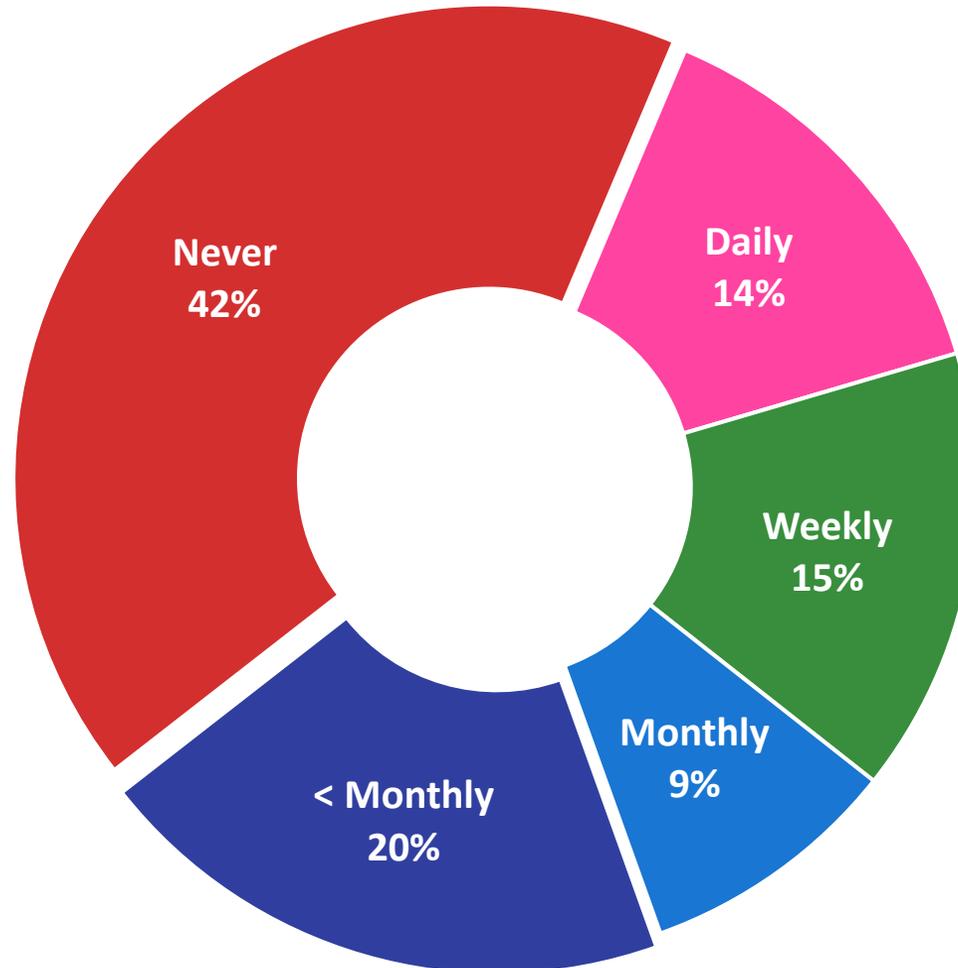


% Who Listen to Podcasts/  
On-Demand Audio Weekly or More



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

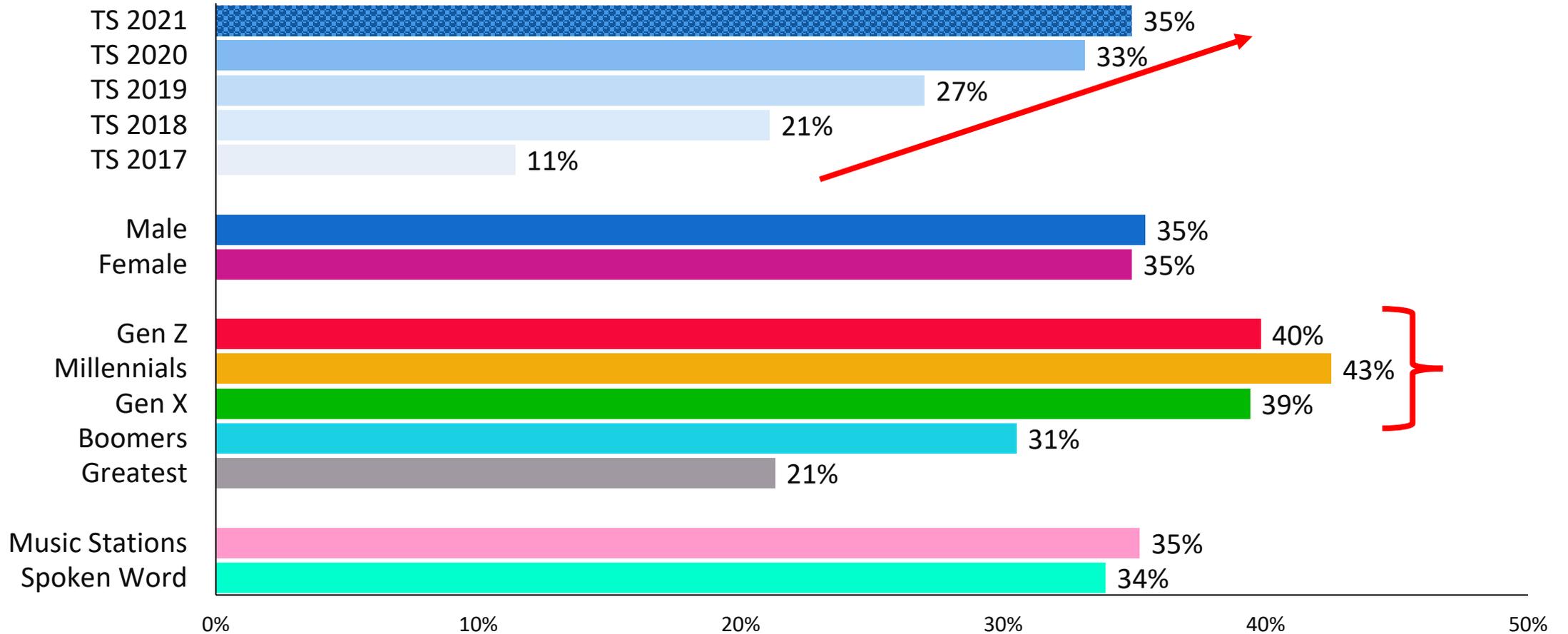
% Who Listen to Podcasts/On-Demand Audio...





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

# Smart Speaker Ownership Is Growing...But Slowing Down

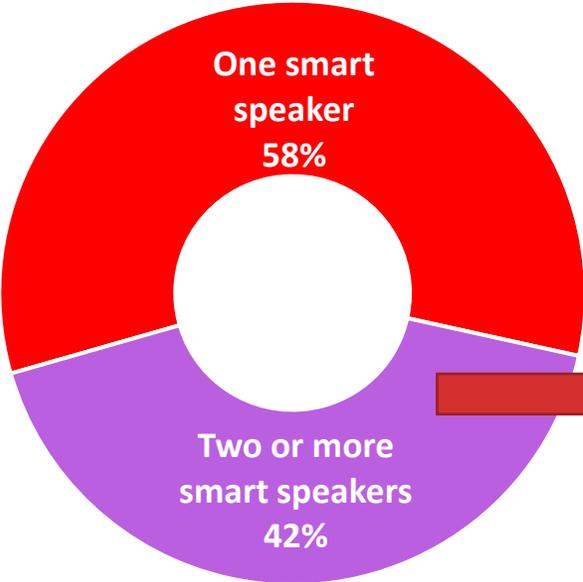


% who own a smart speaker (Amazon Alexa, Google Home/Nest Audio, etc.)

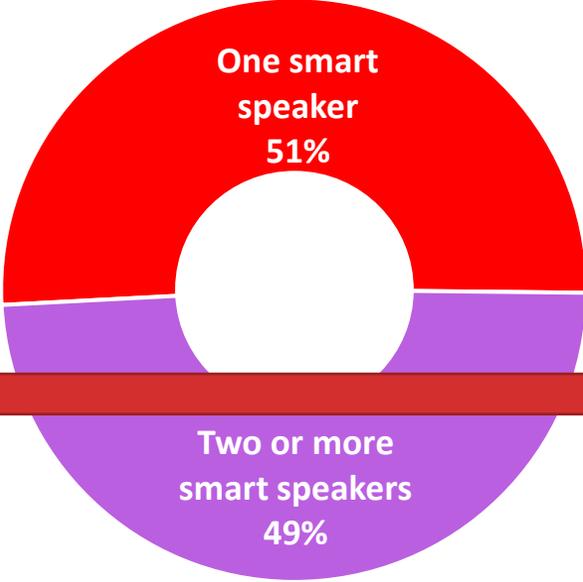
# More Than Six in Ten Smart Speaker Owners Now Have More Than One of These Devices

% of Smart Speaker Owners Who Own...

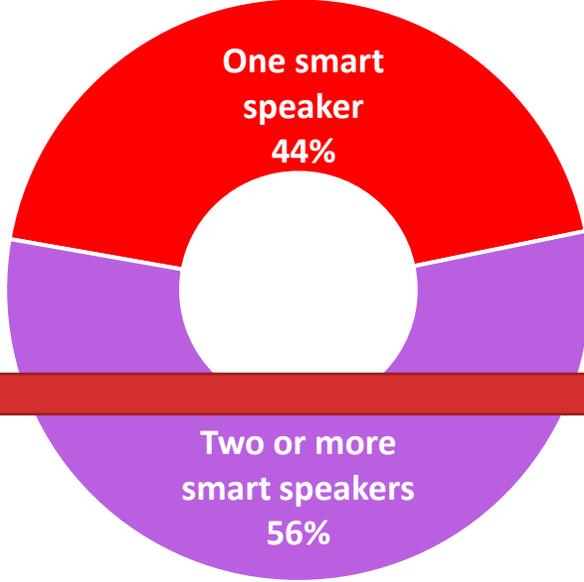
TS 2018



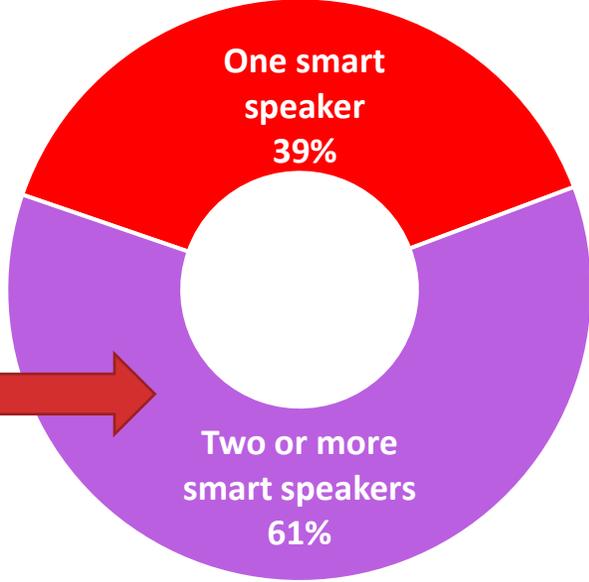
TS 2019



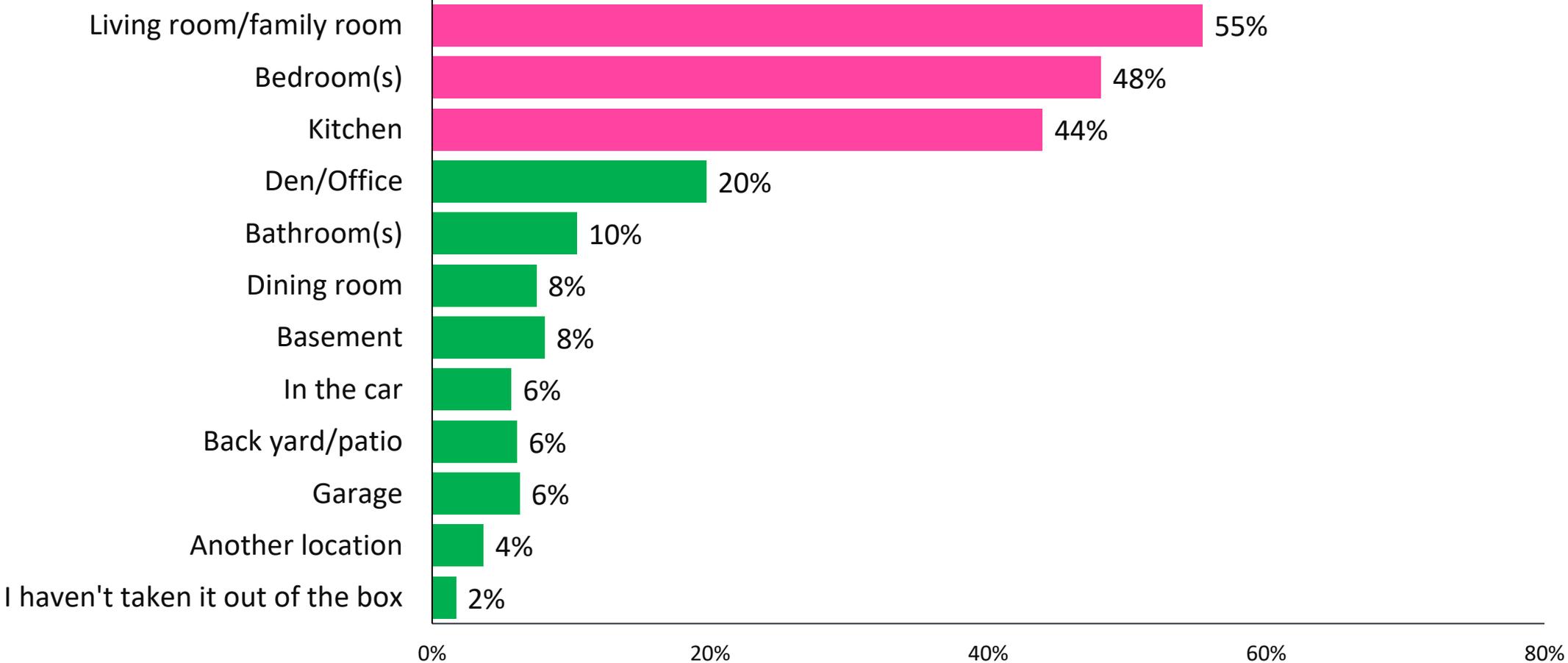
TS 2020



TS 2021

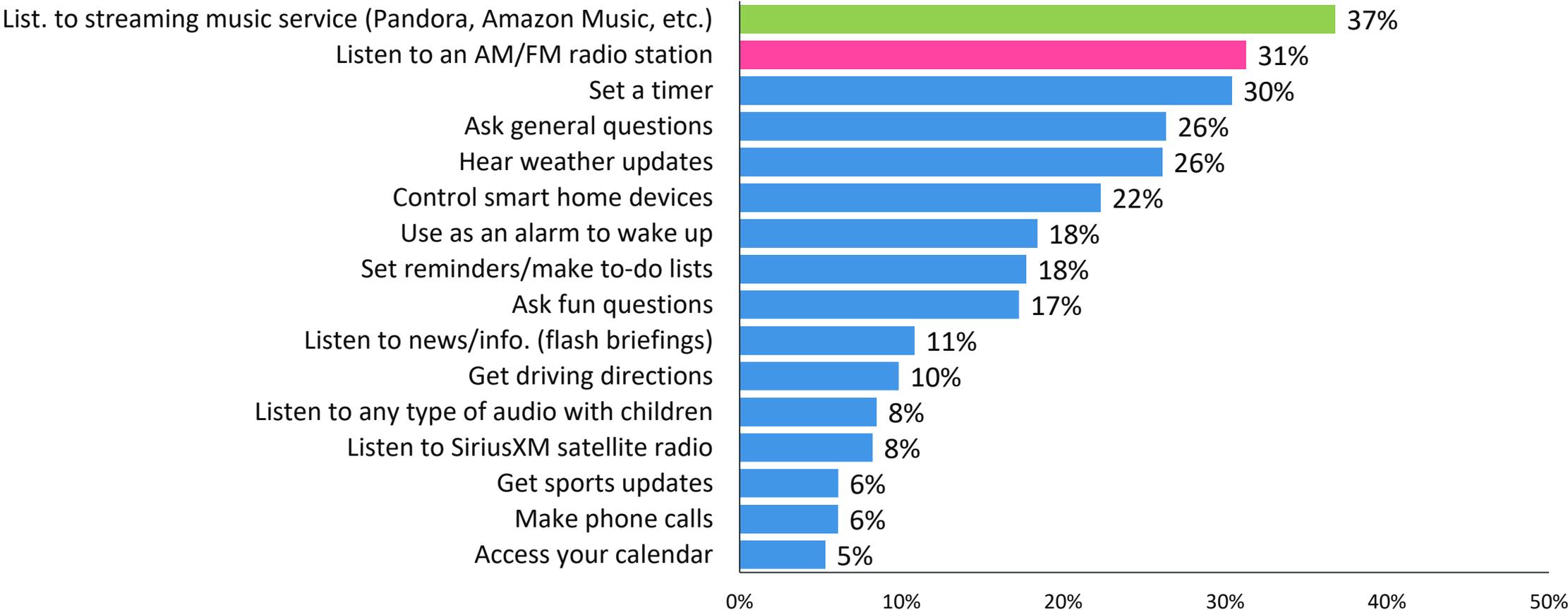


# A Majority of Smart Speaker Owners Place Them in Living & Family Rooms; Bedrooms & Kitchens are Close Behind



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



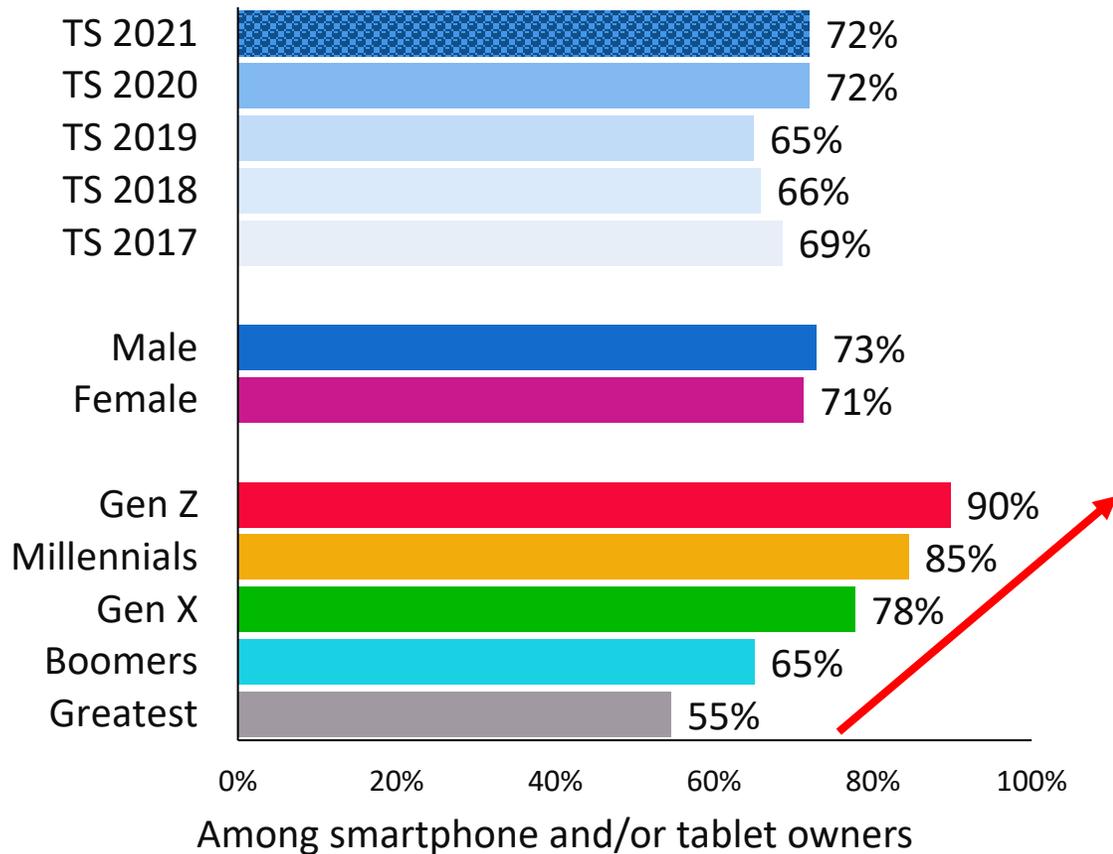
% of smart speaker owners who “frequently” use their device(s) in each way



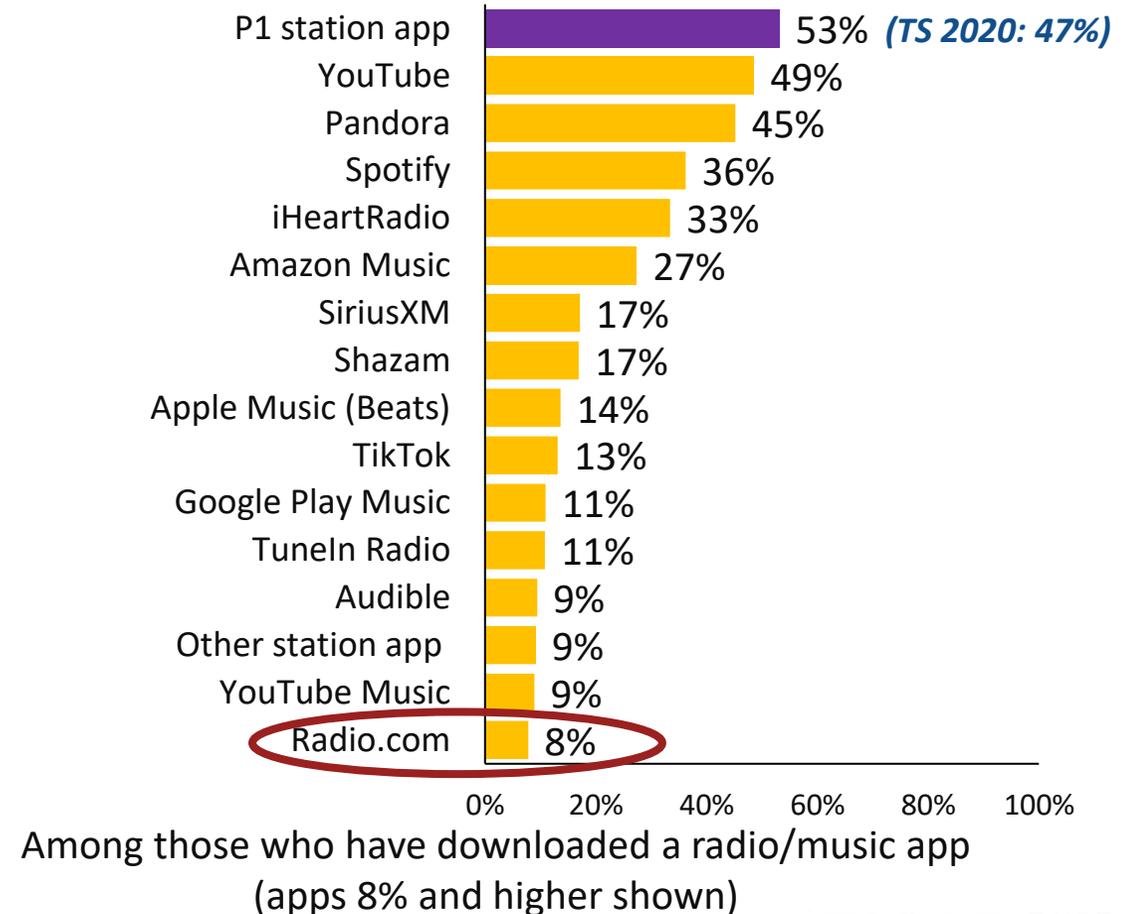
**Mobile phones  
and apps  
continue their  
amazing  
growth  
trajectory**

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

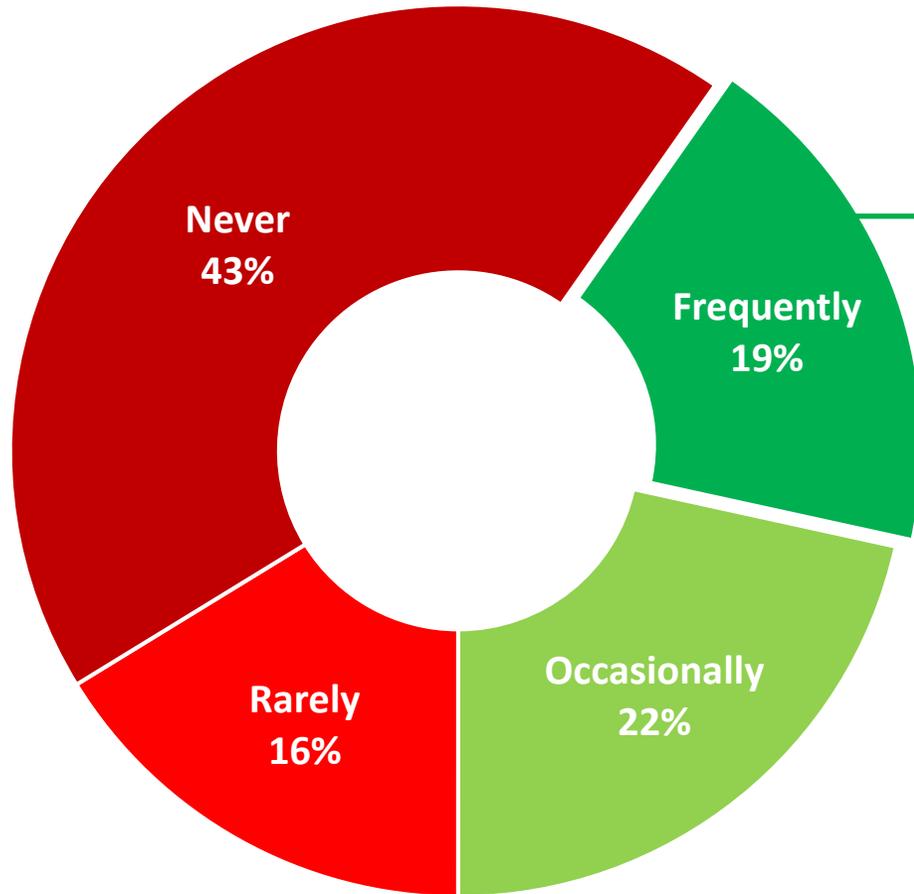
% Who Have Downloaded a Radio/Music App



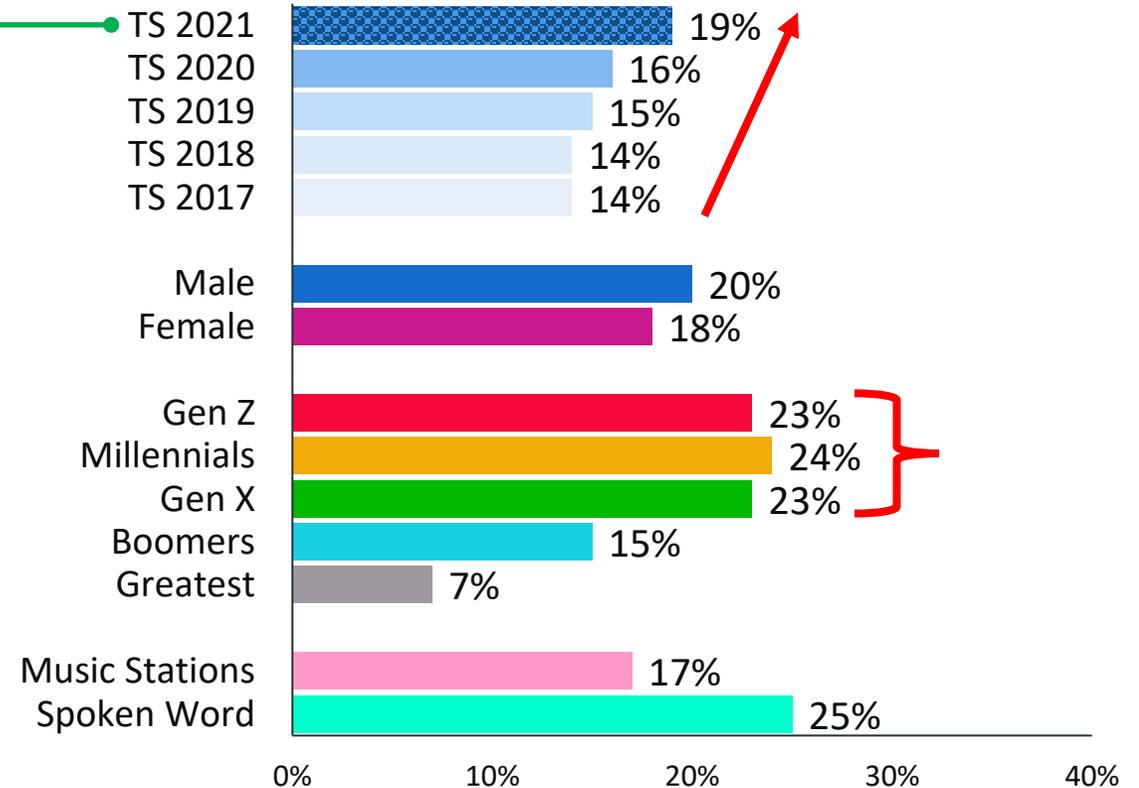
% of Smartphone/Tablet Owners Who Have Downloaded Each Radio/Music App



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

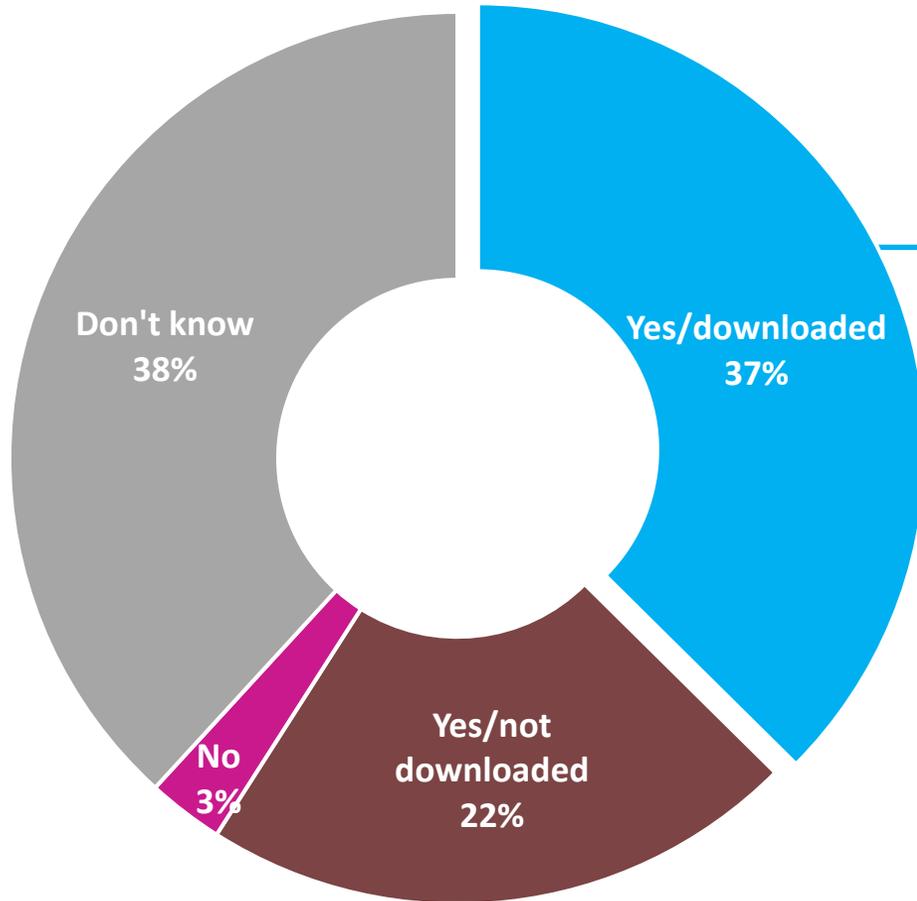


% Who Frequently Stream P1 Station Via a Mobile App

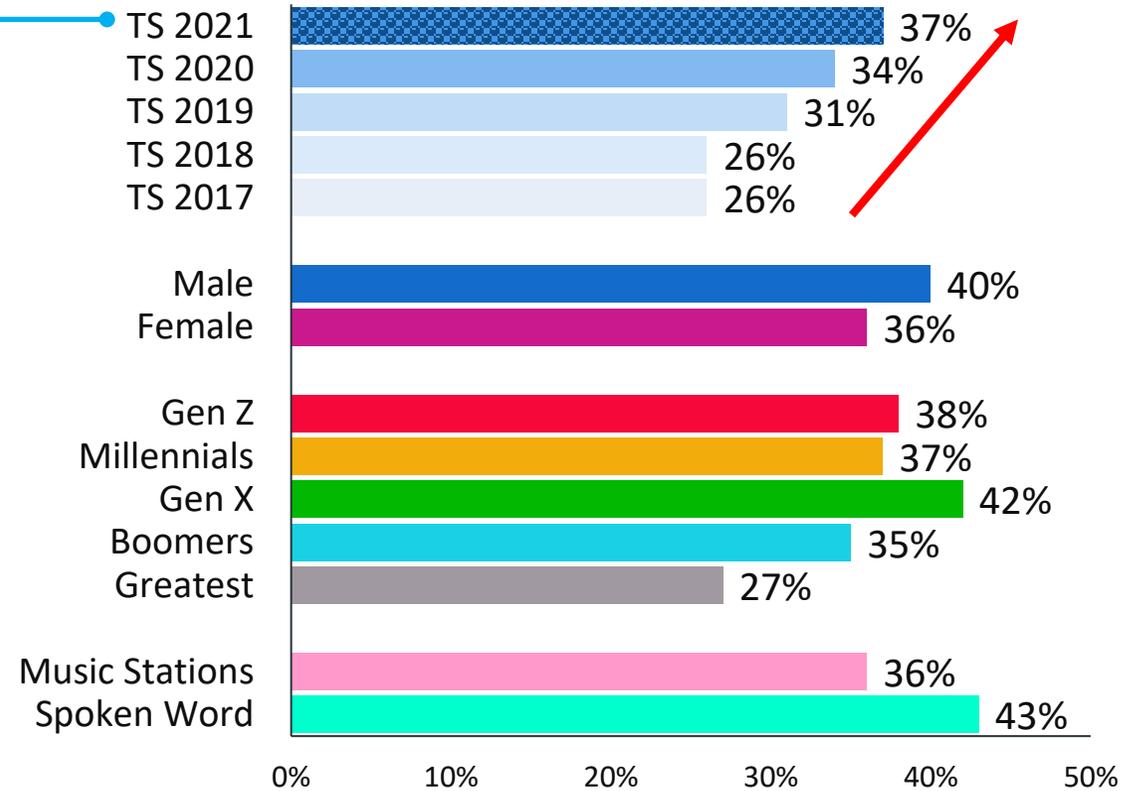


*“How often do you access/interact with THE STATION THAT SENT YOU THIS SURVEY using: streaming via a mobile app?”*

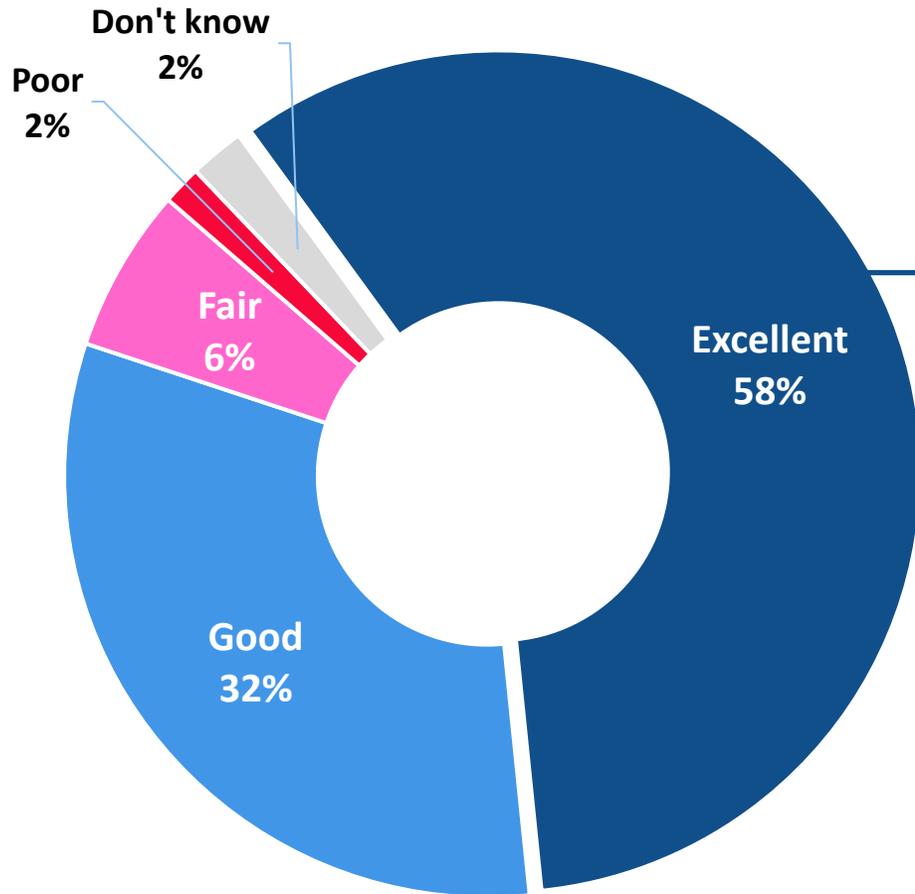
# Six in Ten Mobile Device Owners Are Aware Their P1 Station Has an App; More Than One in Three Has Downloaded It



% of Smartphone/Tablet Owners Who Have Downloaded P1 Station App

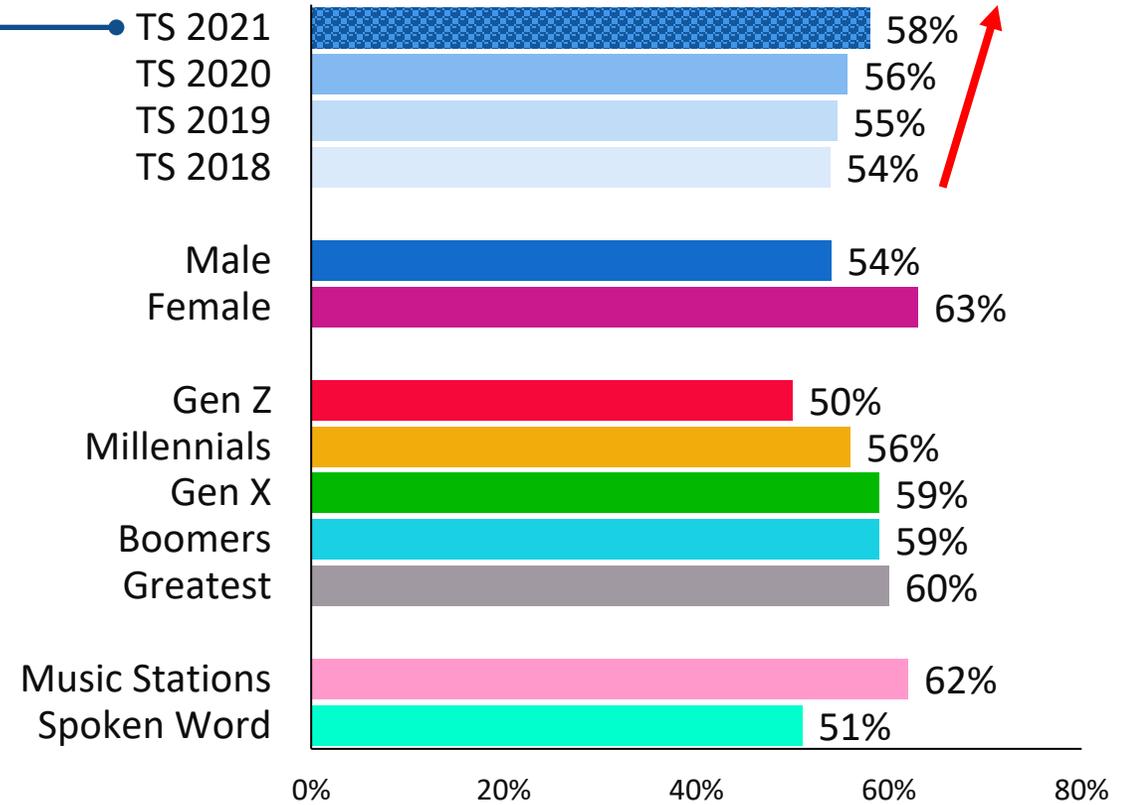


# Most Who Have Downloaded Their P1 Station's App Rate It "Excellent"



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

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

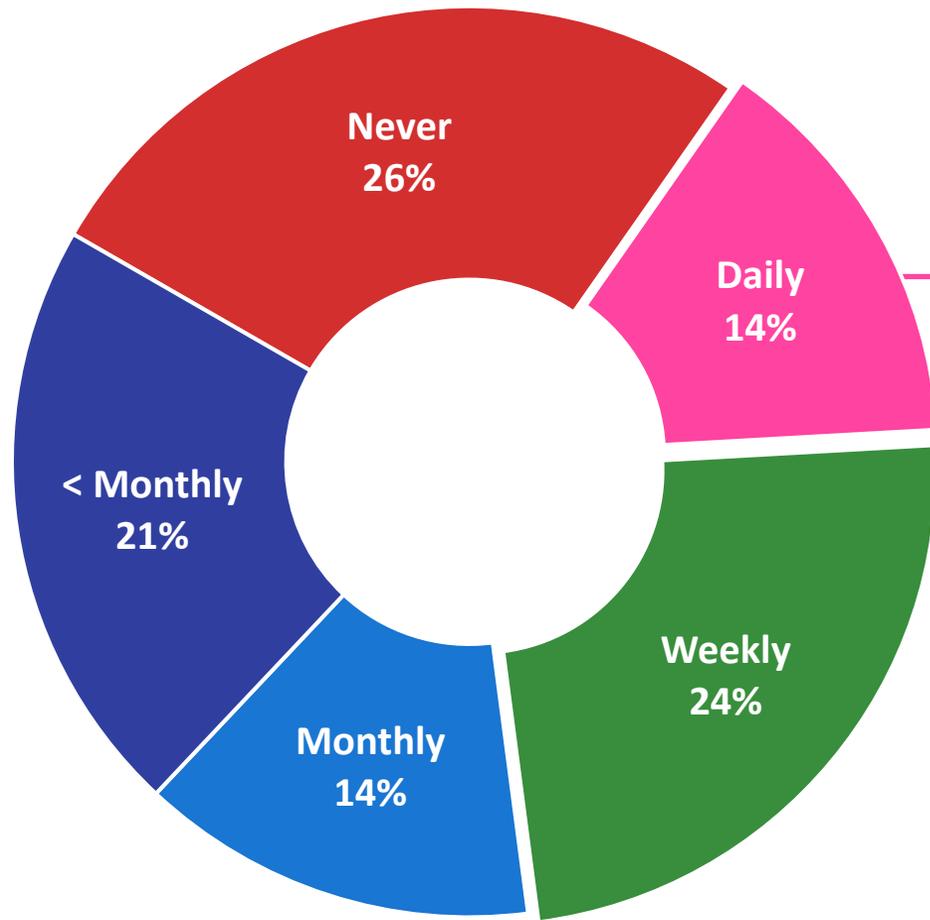


Among smartphone and/or tablet owners who have downloaded their P1 station's app

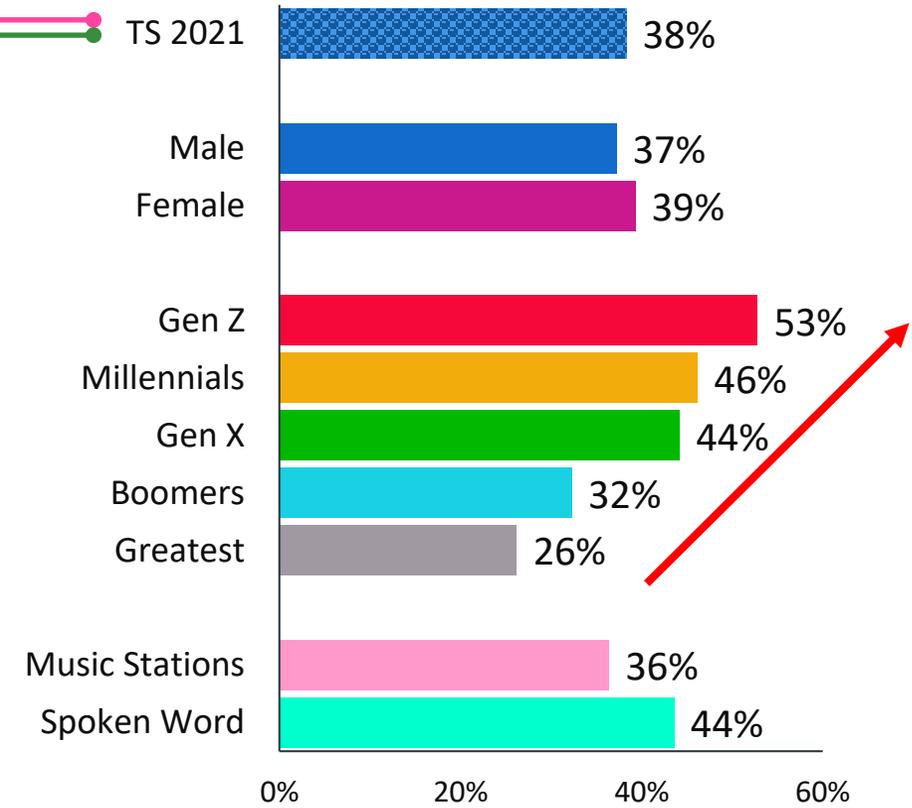


A popular way  
to connect  
during COVID:  
Online  
meetings and  
gatherings

# 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

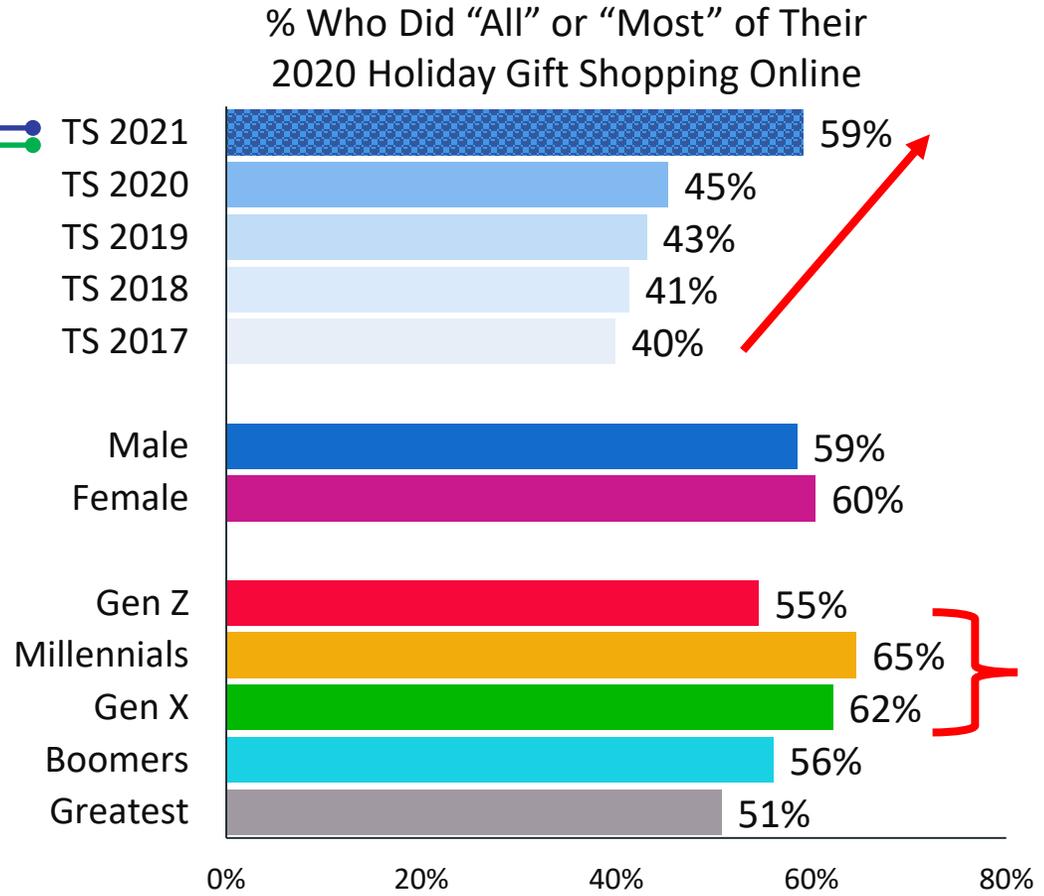
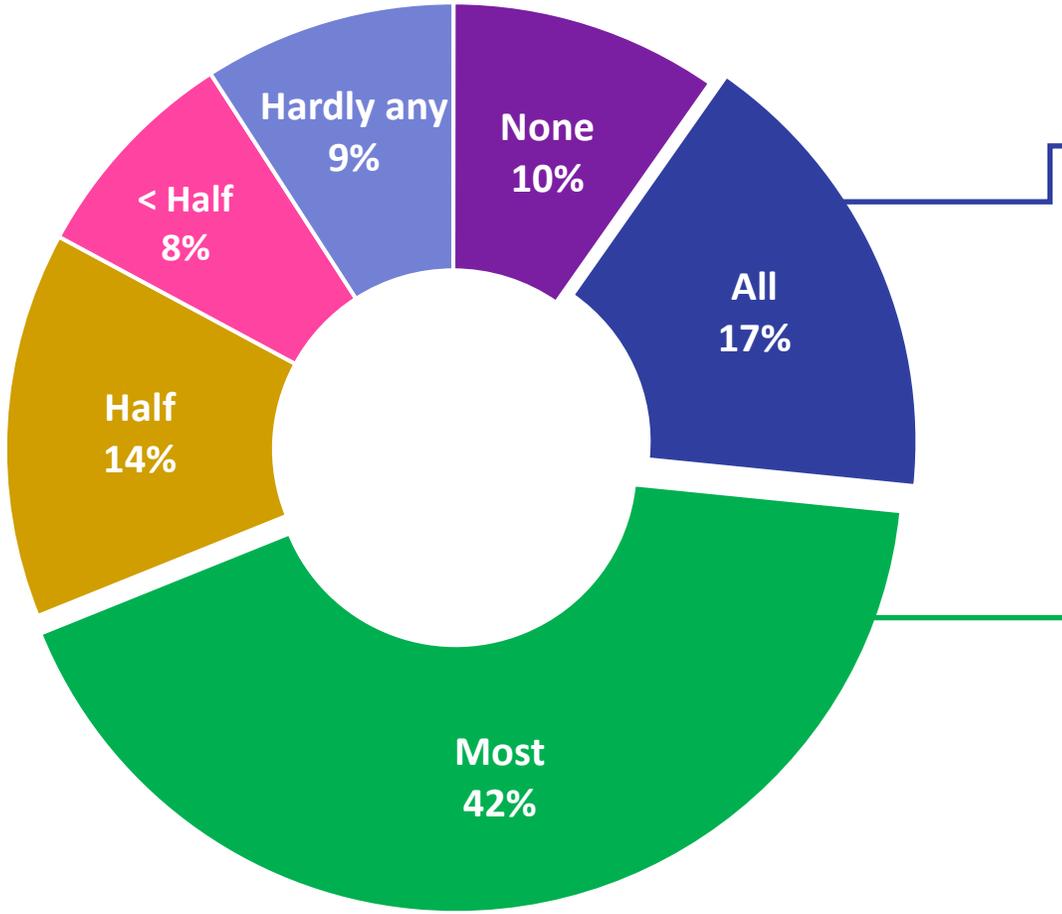


*“How often do you participate in virtual online meetings/gatherings/calls on video-chat platforms like Zoom or Google Meet?”*



**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

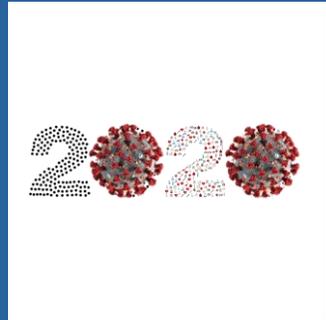
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Executive Summary

TECHSURVEY  
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# Radio in the Year of COVID

