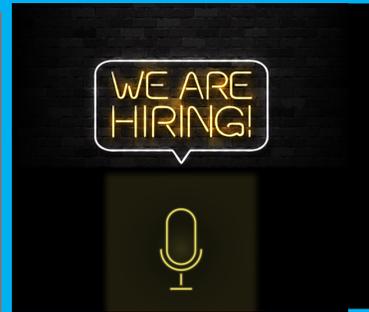


Jacobs

media strategies

Executive Summary
TECHSURVEY
2022 JACOBS MEDIA



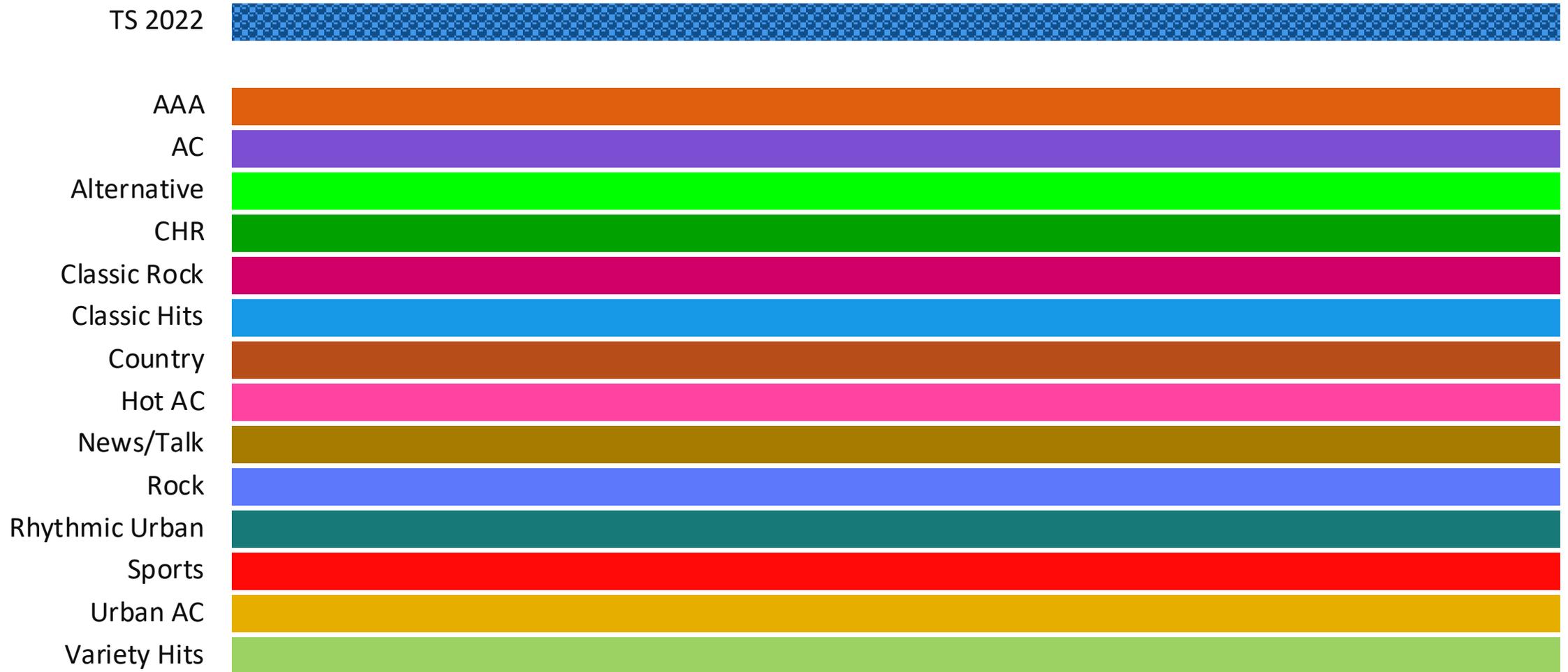
Radio: A Return To "Normal?"



Methodology

- 474 commercial radio stations in the U.S. & Canada
- N = 30,819
- Interview dates: January 5 - February 7, 2022 (during COVID omicron)
 - TS 2021 dates: January/February 2021 during COVID
 - TS 2020 dates: January/February 2020 pre-COVID
- Most respondents are members of station databases. Some responses were gathered via station websites and/or social media pages
- All responses were collected online and weighted using Nielsen 2021 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.

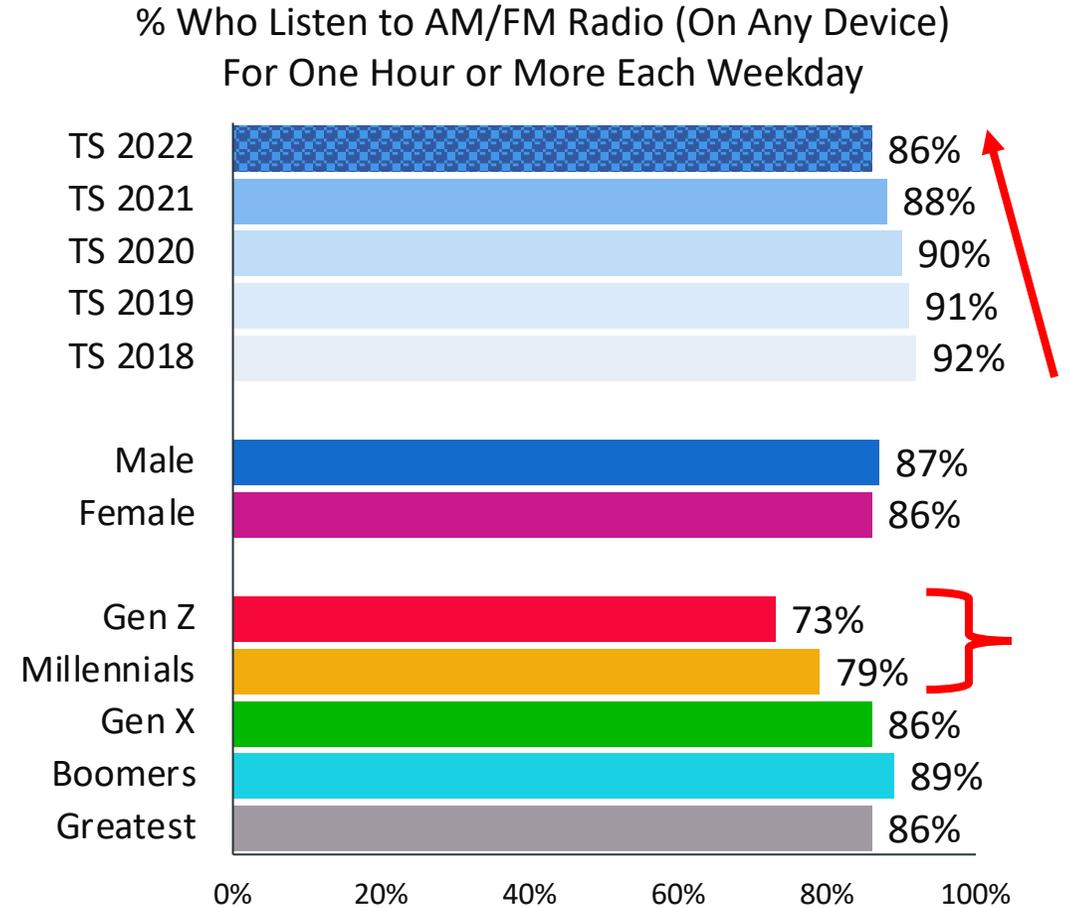
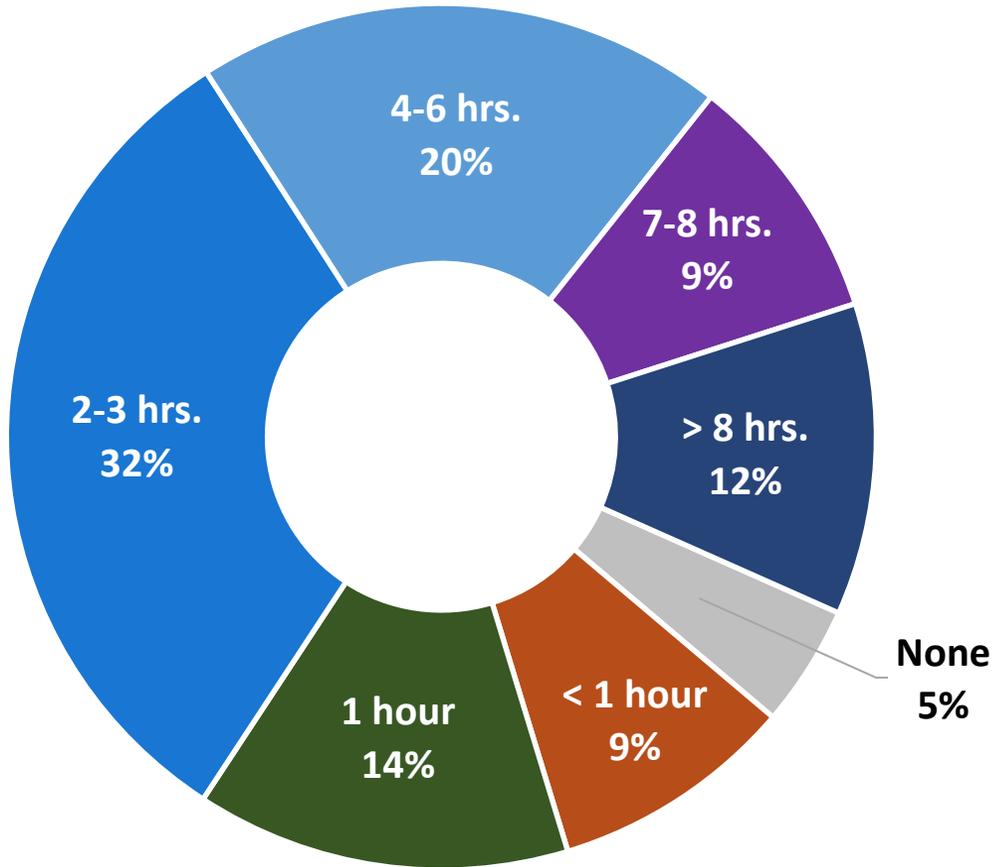
Format Key





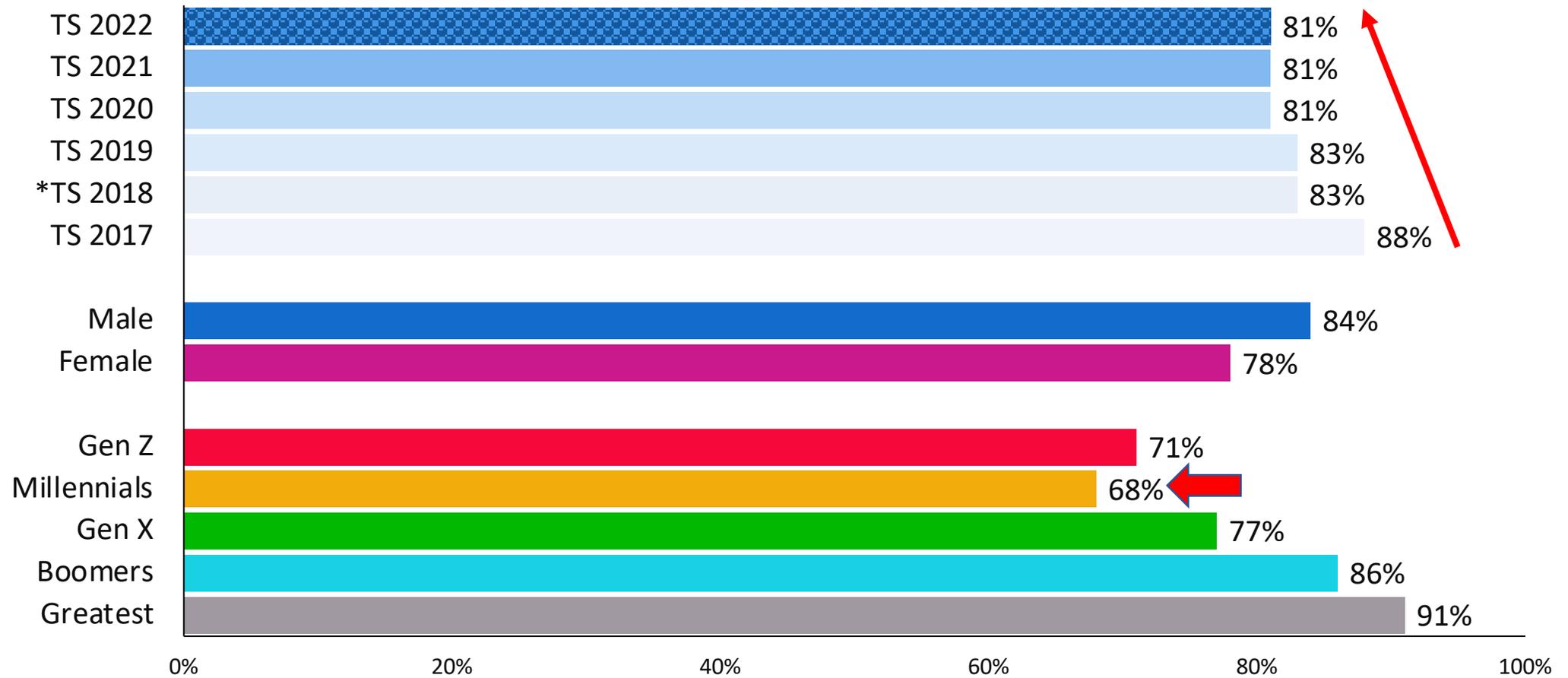
COVID aside, radio listening even among core fans is tick down, while the audience is aging. No surprise: younger people are least involved with AM/FM radio.

AM/FM Listening Is Slowly 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, Much Less So For Millennials



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

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



Who is broadcast radio's competition?



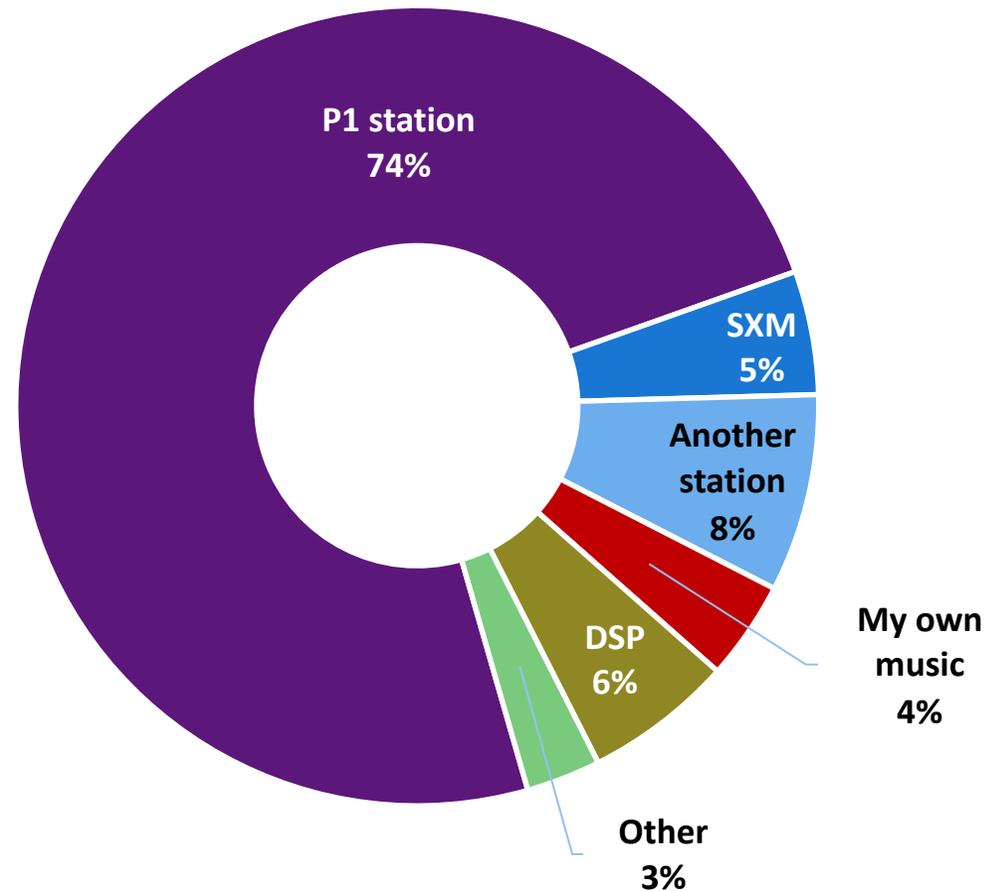
“When you're in the mood to listen to the kind of (music/news/sports) THE STATION THAT SENT YOU THIS SURVEY usually plays/features, which ONE of the following is usually your first choice?”



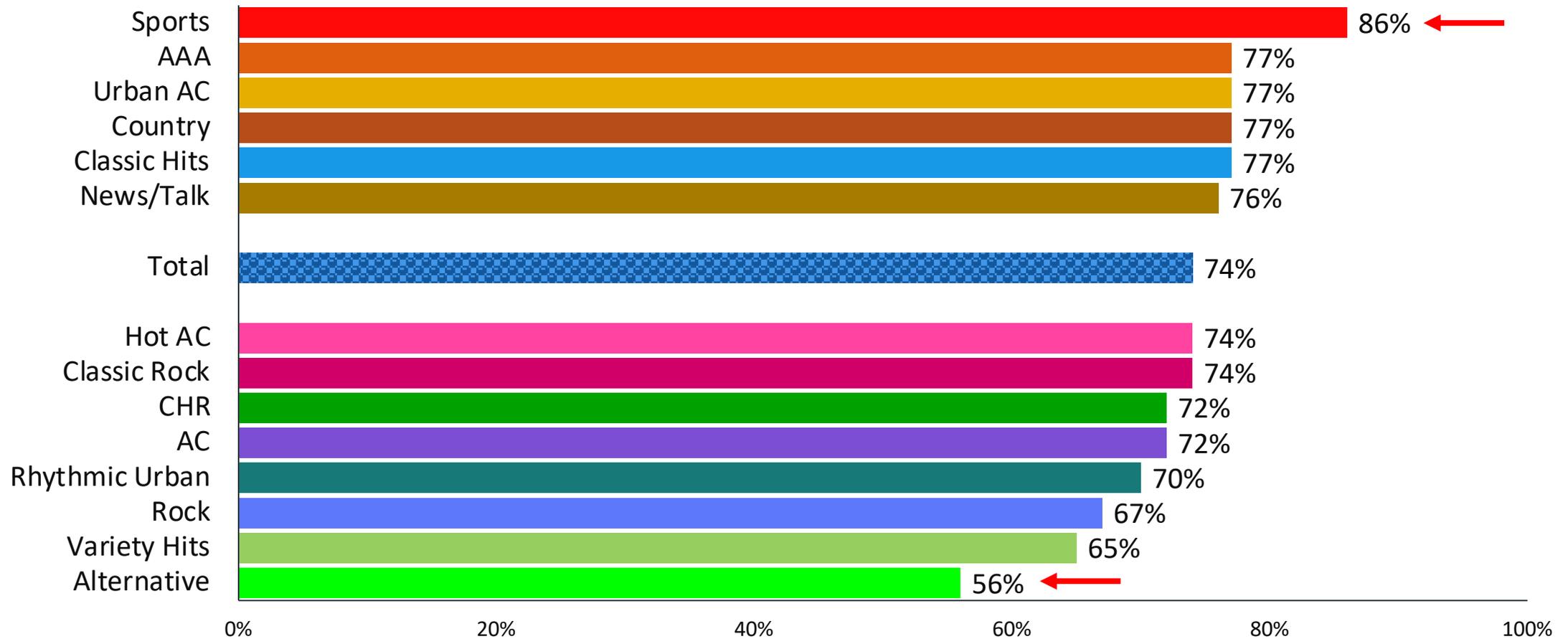
For most formats, a strong majority select their P1 station as first choice. Alternative garners the fewest top choice votes, a format where streaming platforms perform well.

Nearly Three in Four Choose Their P1 Station First When Seeking Its Core Content

First Choice For Listening to P1 Station's Content*

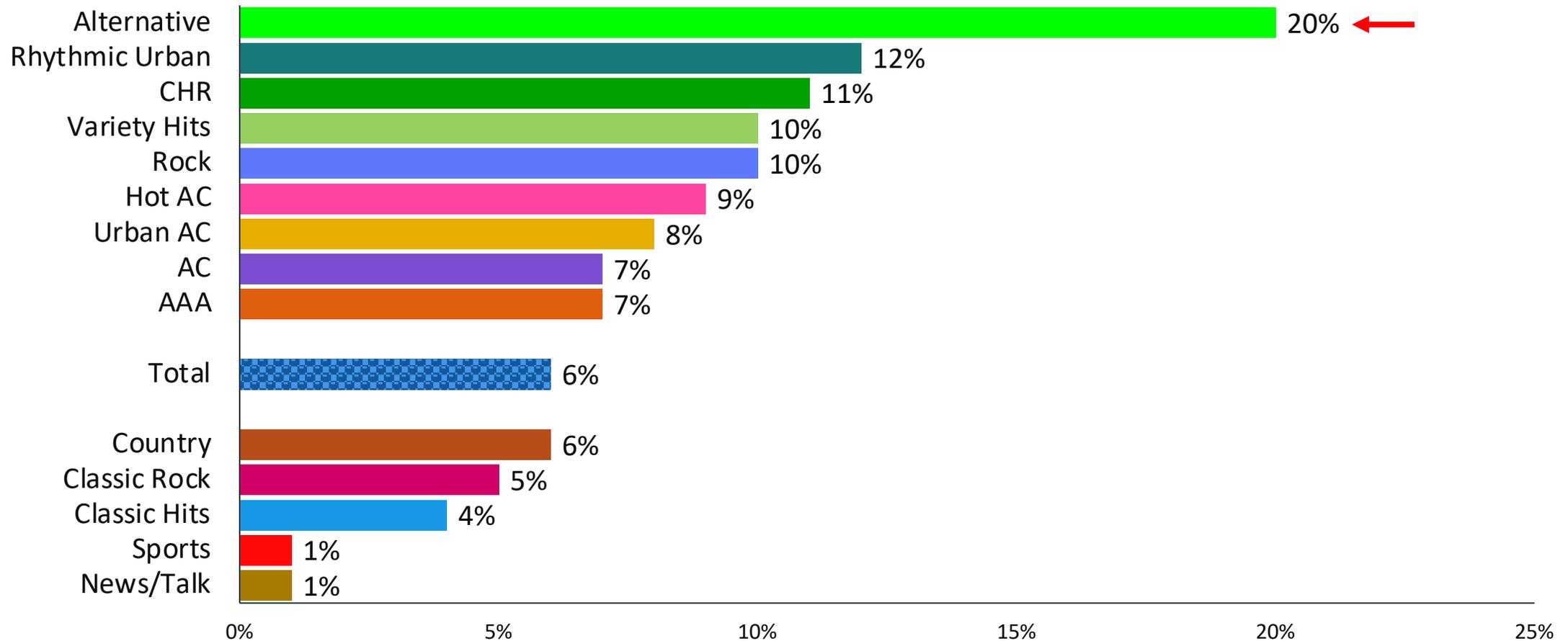


Sports Radio Exhibits the Most Station Centricity, While Alternative Listeners Are Most Apt to Seek Content From Other Audio Platforms



% by format who choose their P1 station first when they are in the mood to hear (music/news & info./sports) that their P1 station usually plays

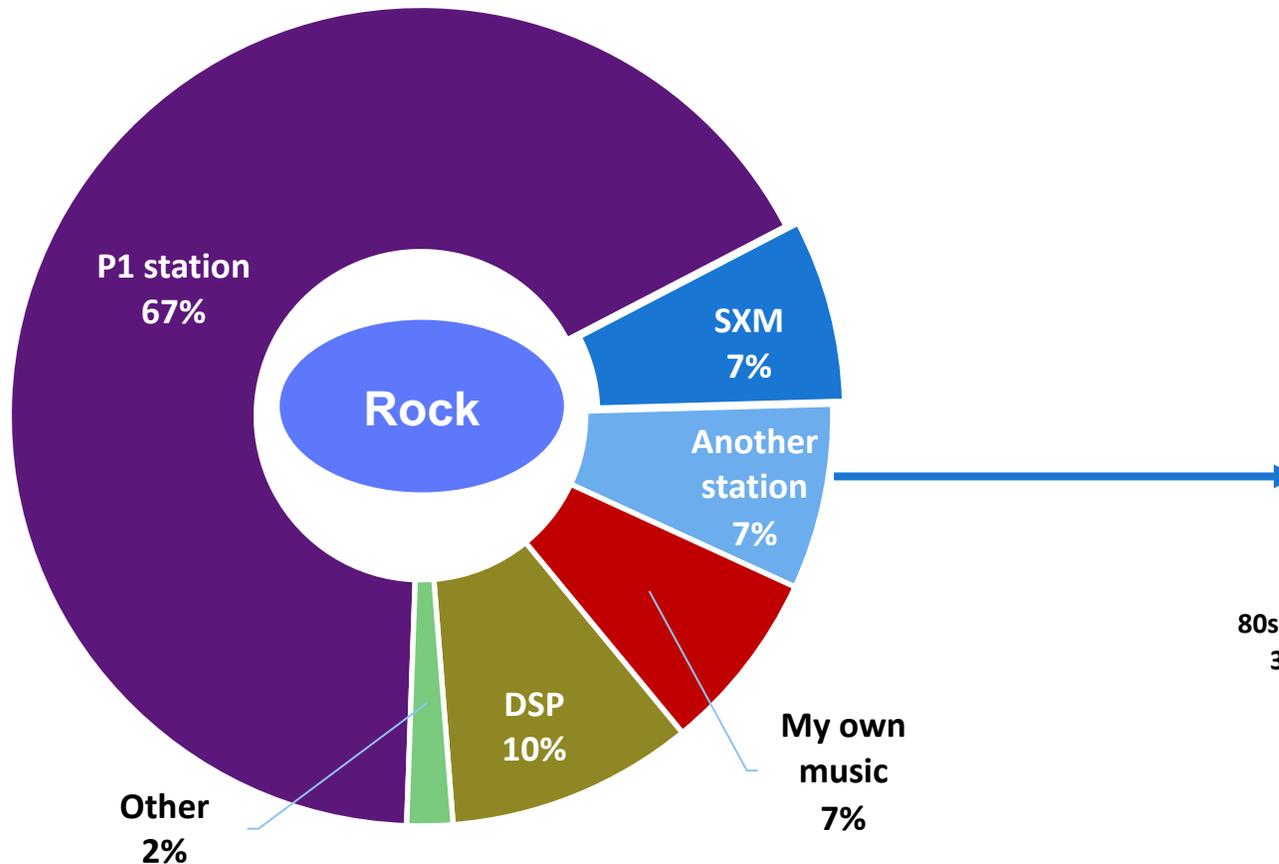
Far More Than Other Formats, Alternative Fans Are Much More Likely to Choose a DSP as Their First Choice



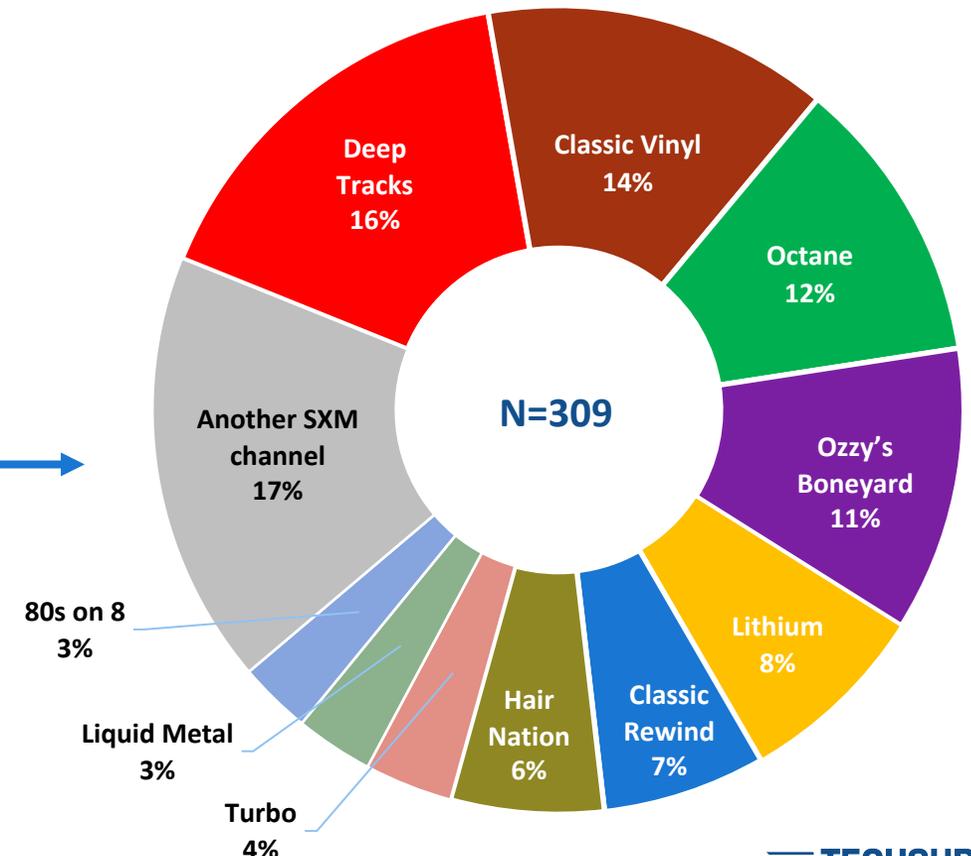
% by format who choose a streaming audio service first when they are in the mood to hear (music/news & info./sports) that their P1 station usually plays

Two in Three Rock Fans Choose Their P1 Station First When in the Mood to Listen to P1 Station's Music

First Choice for Rock Music



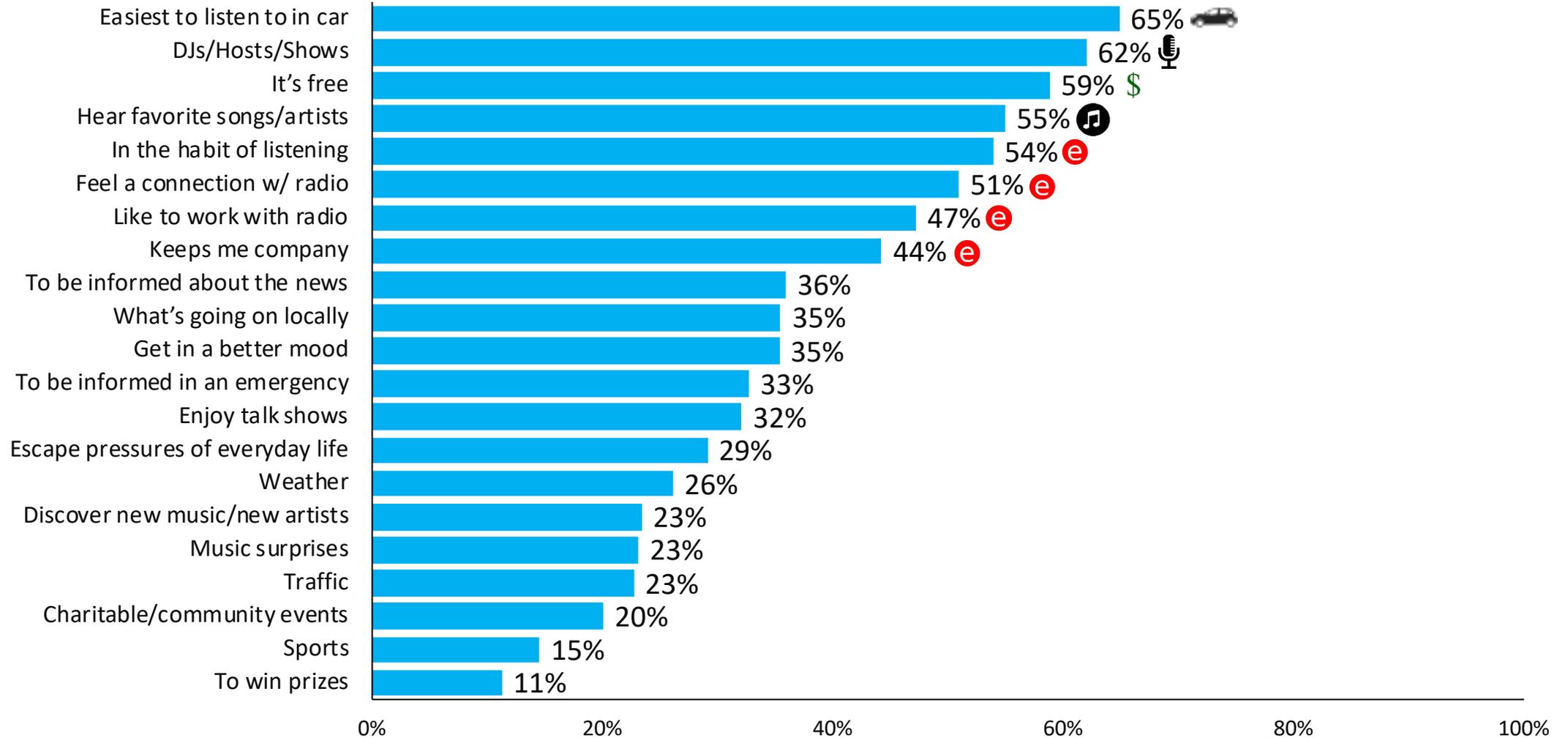
First Choice SiriusXM Channel





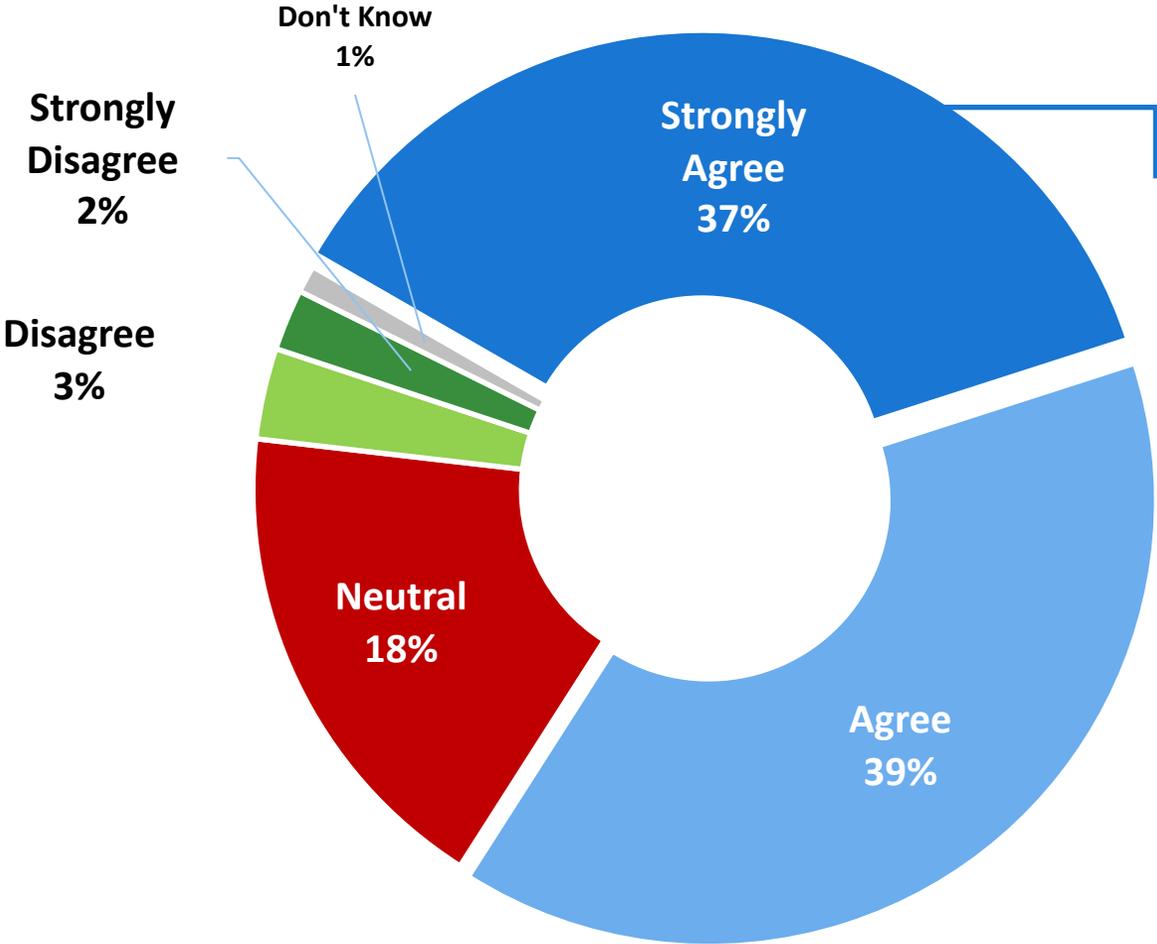
With all these audio options, why are people still listening to radio?

Why AM/FM Radio?

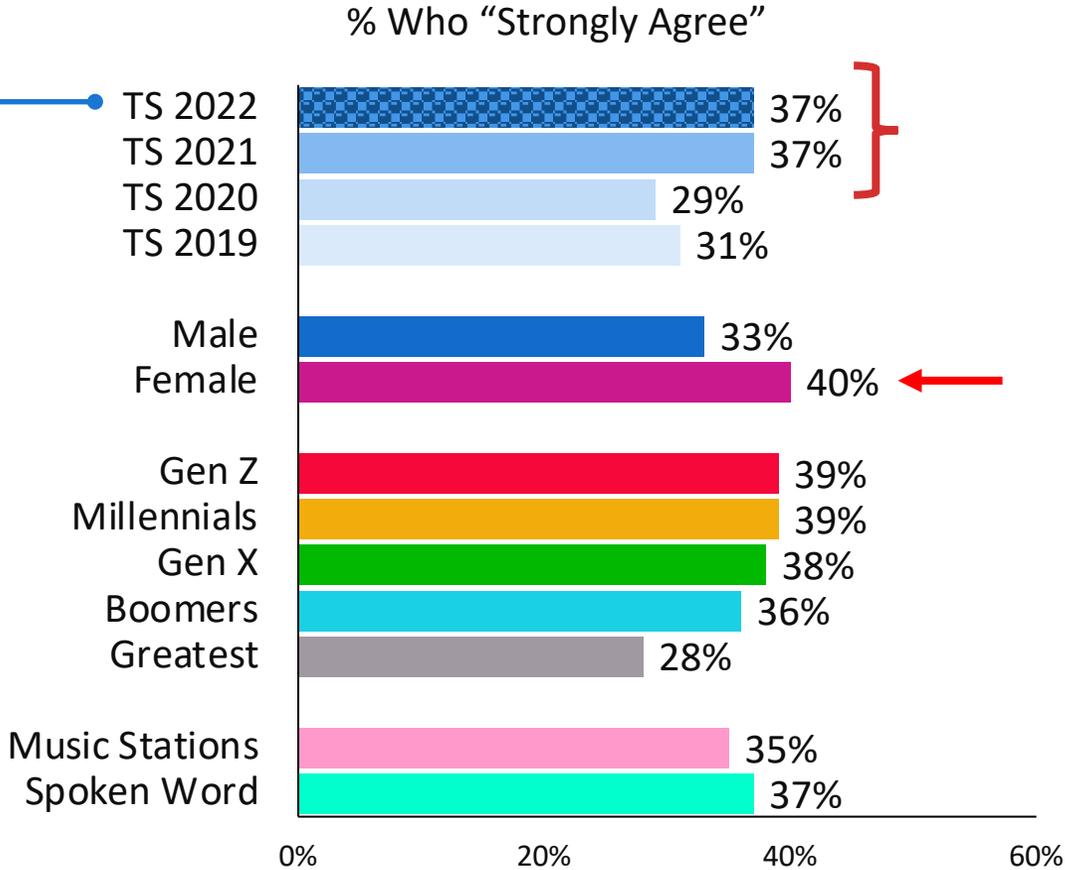


Among those who listen to AM/FM radio, % who say this is a main reason they listen

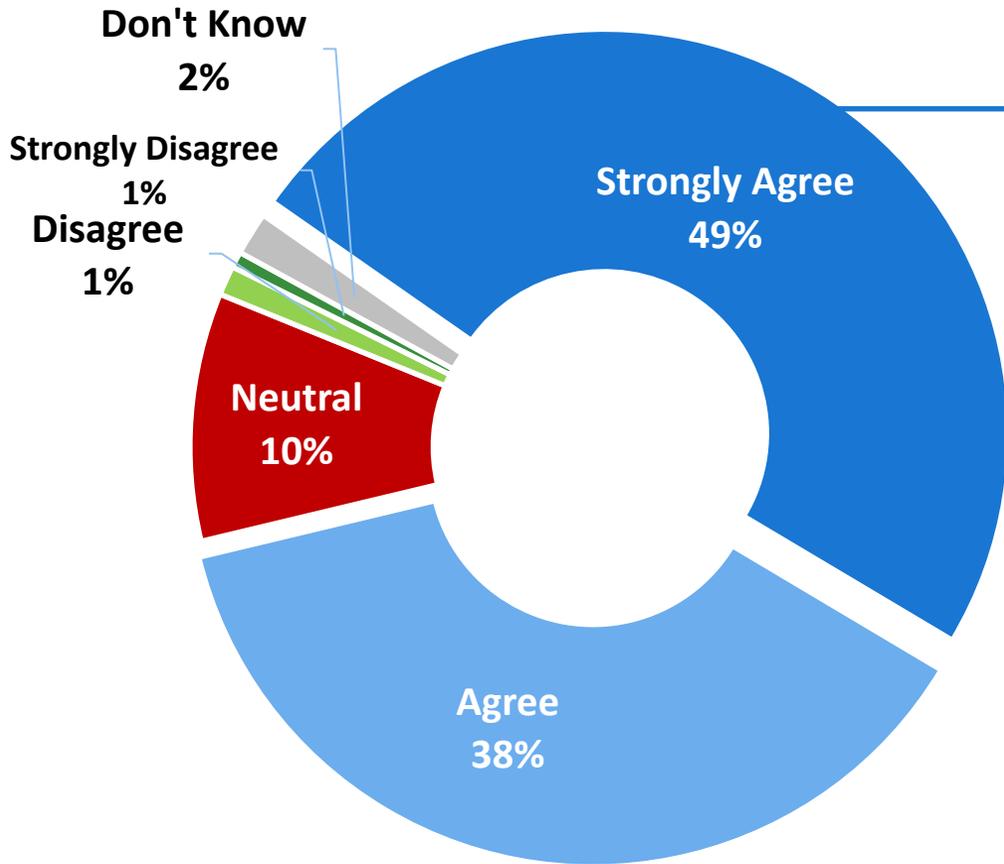
Since COVID, Core Radio Listeners Feel a Stronger Connection to Their P1 Station



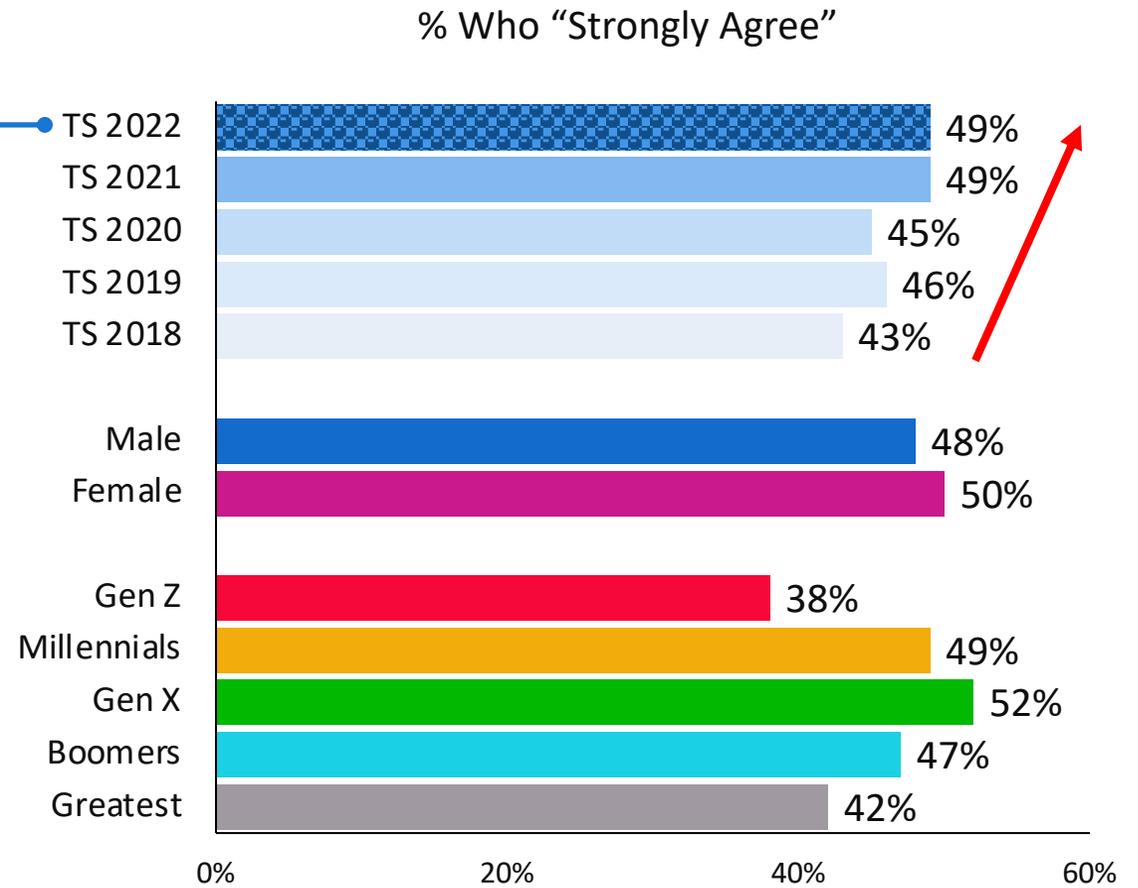
*"I really feel a sense of connection to
THE STATION THAT SENT ME THIS SURVEY"*



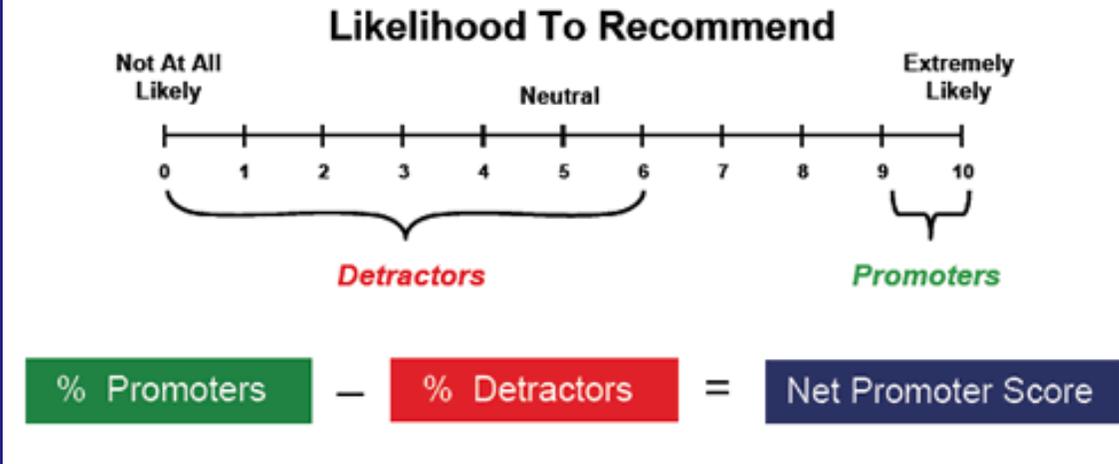
Except for Gen Z, Radio's Local Edge Is Solid Across the Board



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



NET PROMOTER

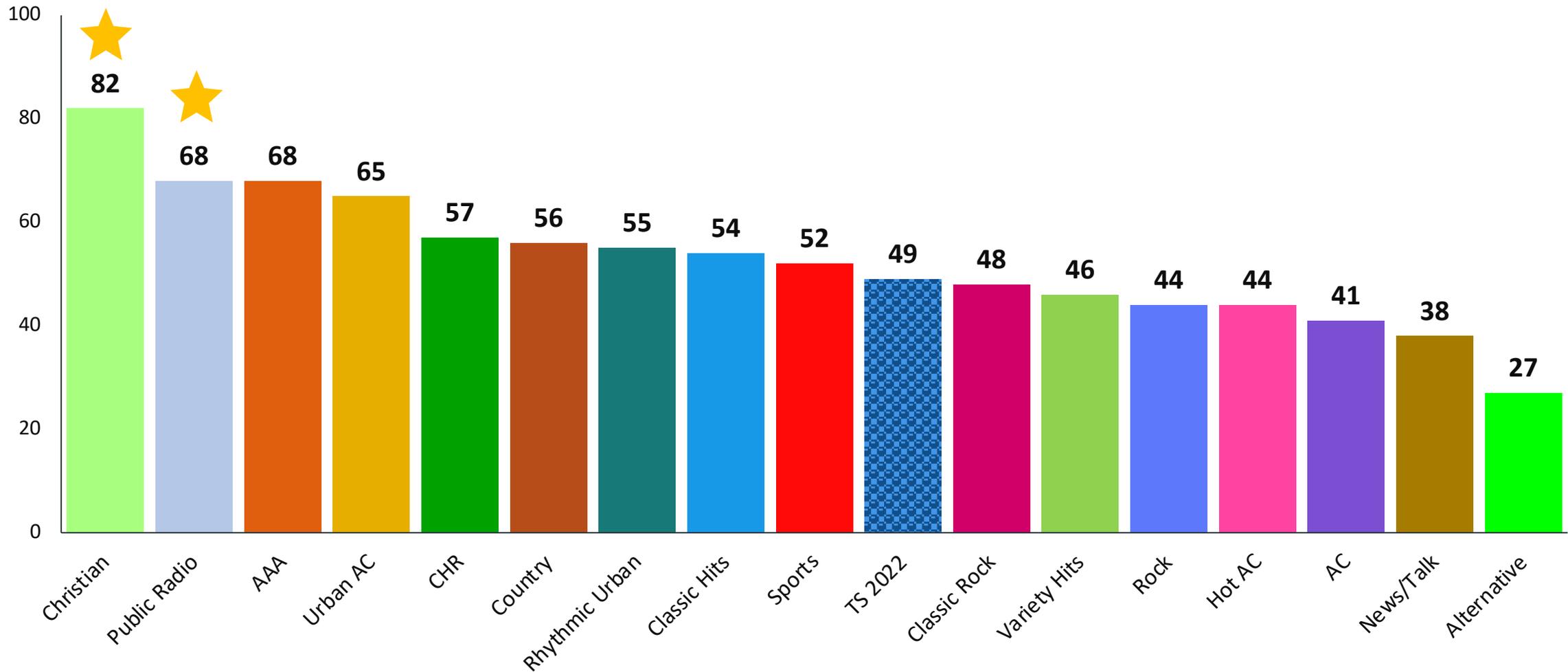


Radio's word-of-mouth scores (Net Promoter) are holding strong

The P1s Are Hanging In: Radio's Two Best Net Promoter Scores Have Come Since COVID



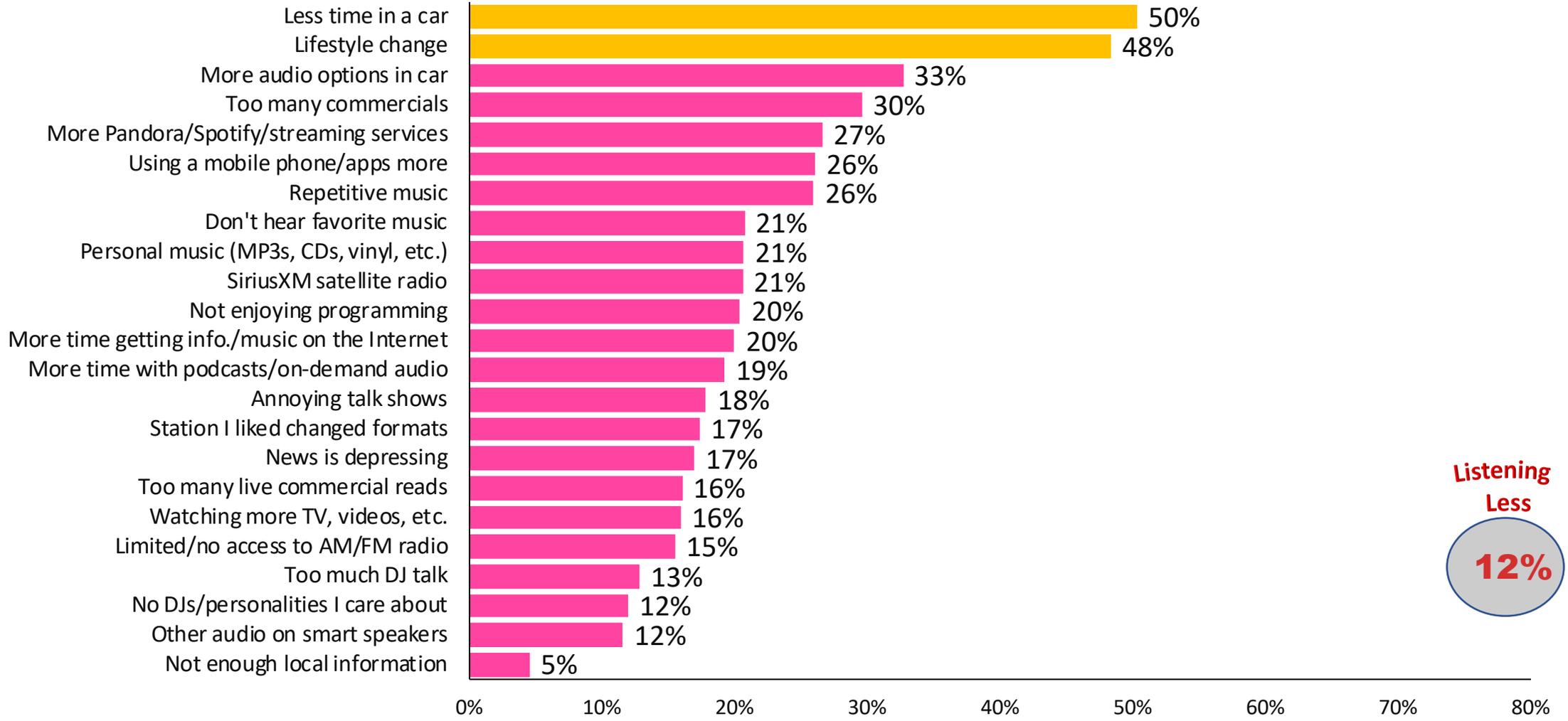
Christian Radio Lead NPS, While Triple A, Public Radio, and Urban AC Are Close Behind





People are driving again – but not at pre-pandemic levels

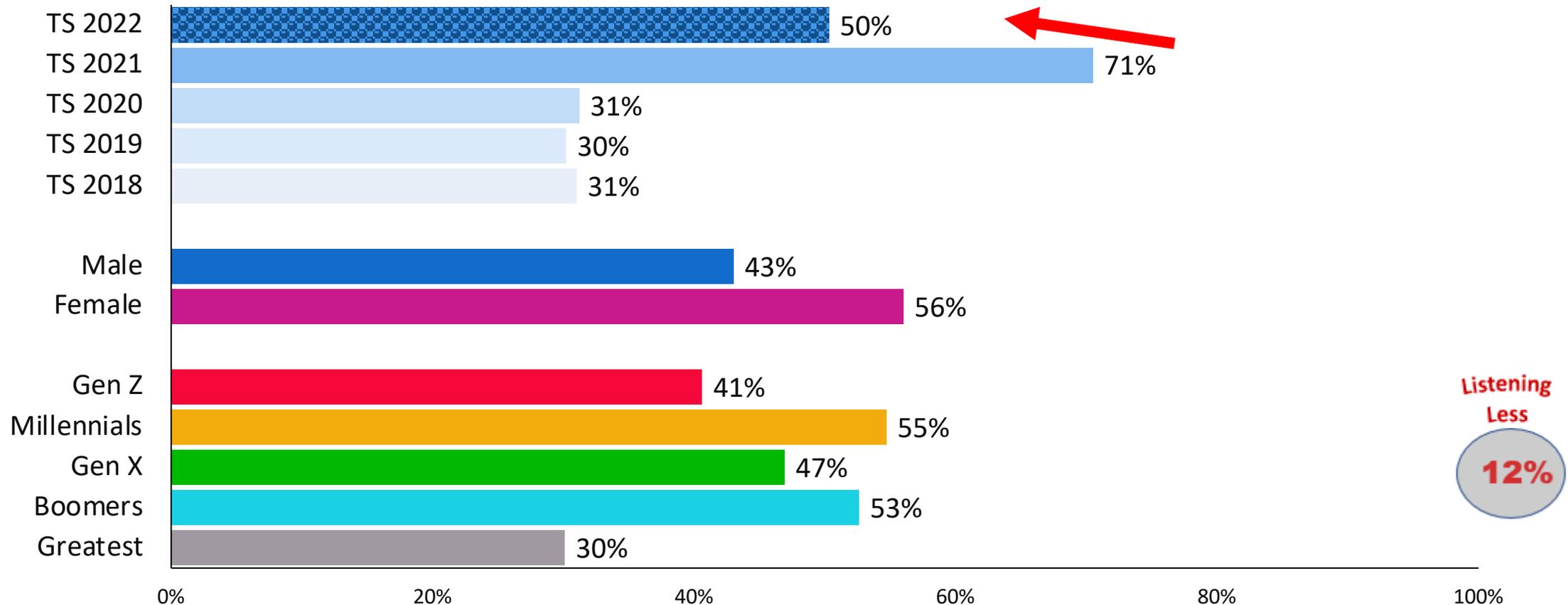
Why LESS Radio? A Reduced, But Still Large, COVID Impact on Time in a Car, WFH, Unemployment



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

Half of Those Listening Less Say It's About Less Time in a Car Is a Main Reason, Down Markedly From Last Year

"Spending Less Time in a Car"

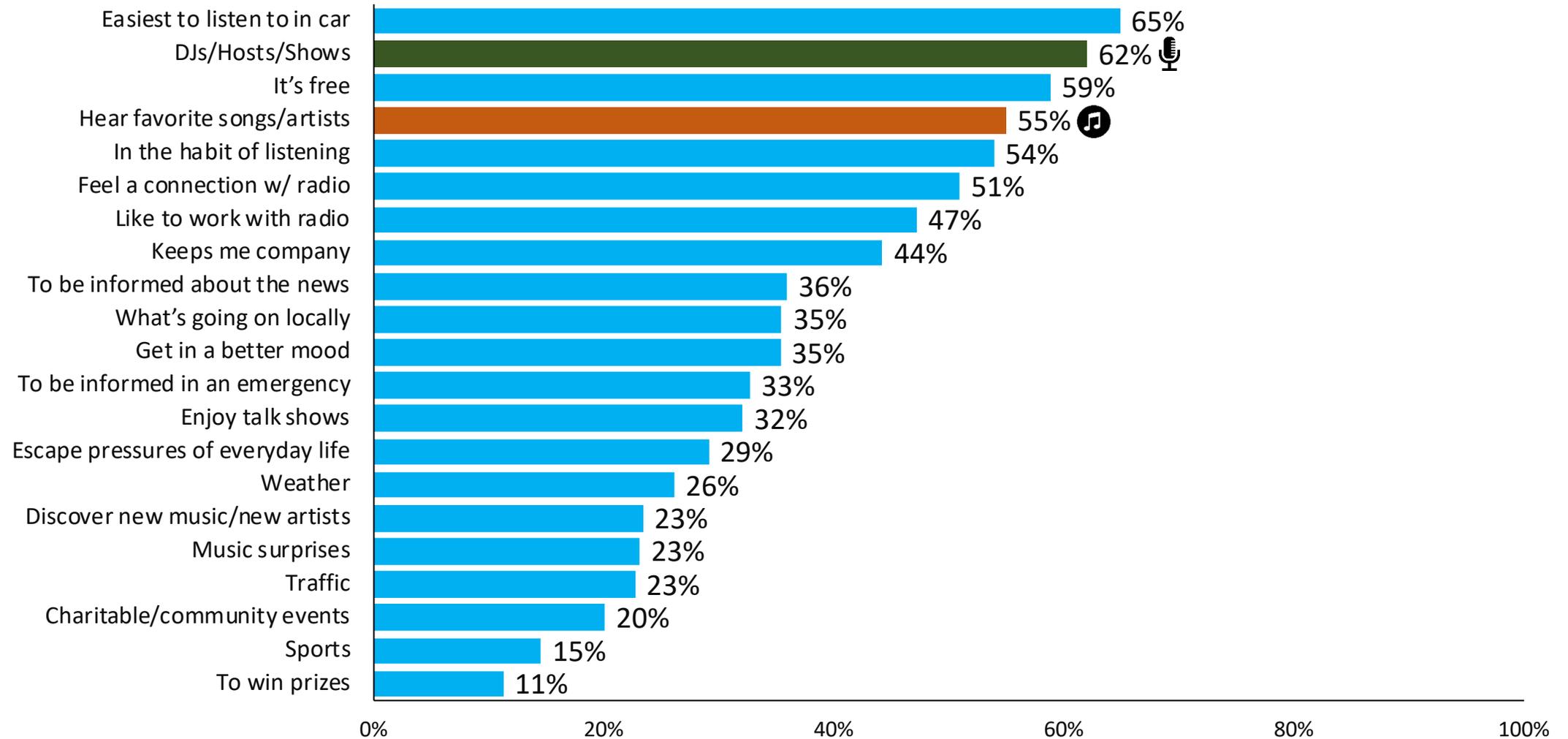


Among those who say they are listening less to AM/FM radio in the past year, % who say this is a main reason they listen less



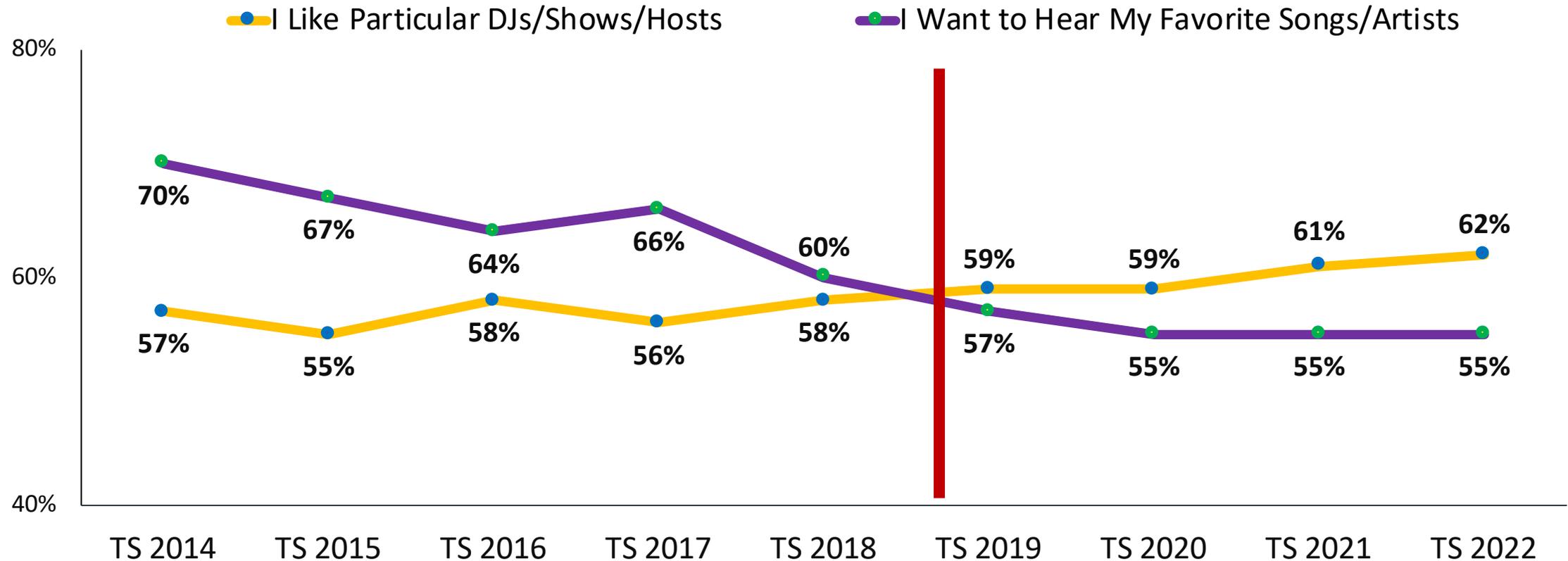
Over the past four surveys, broadcast radio personalities have stayed ahead of the music as key attributes of the medium

Personalities Outpace Music in Appeal



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

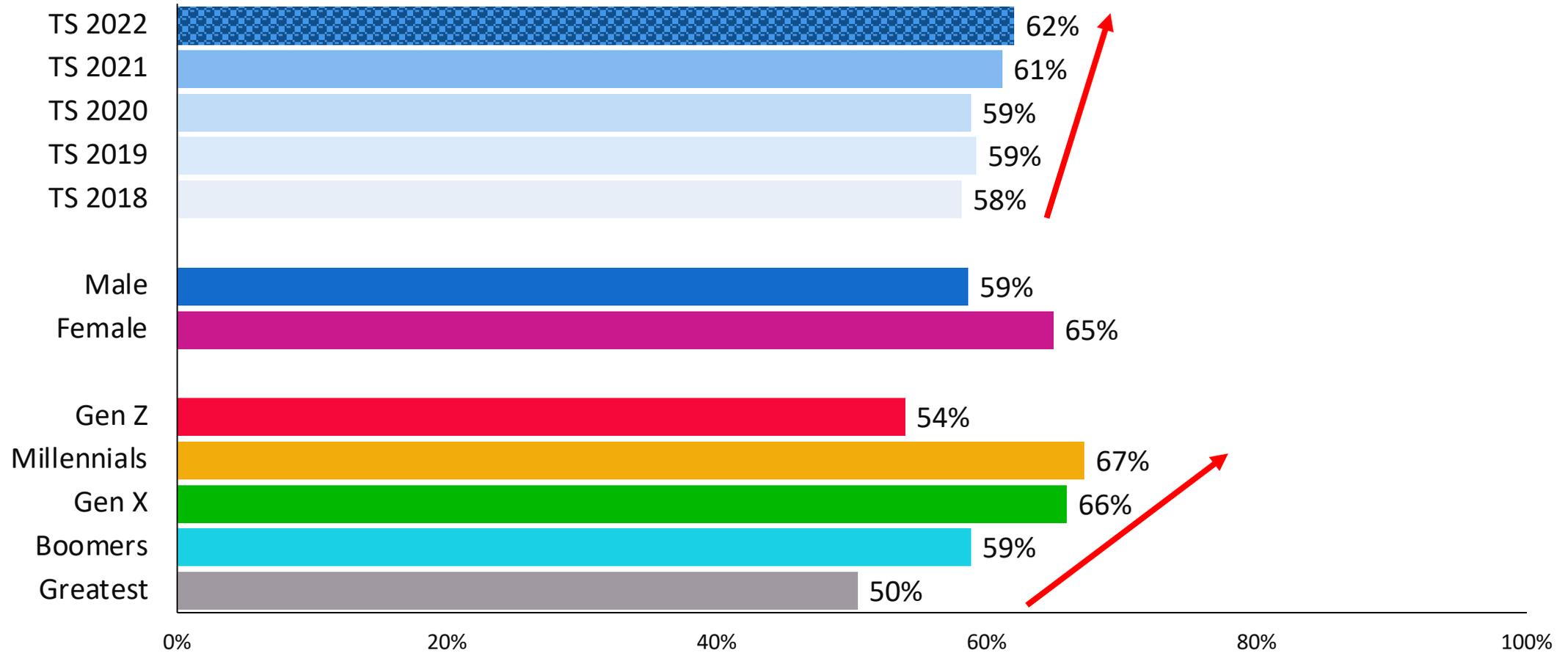
With Each Passing Year, the Appeal of Music on the Radio Is Becoming Secondary to the Power of its Personalities



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

Personality Appeal is Strongest Among Women and Gens Y & X

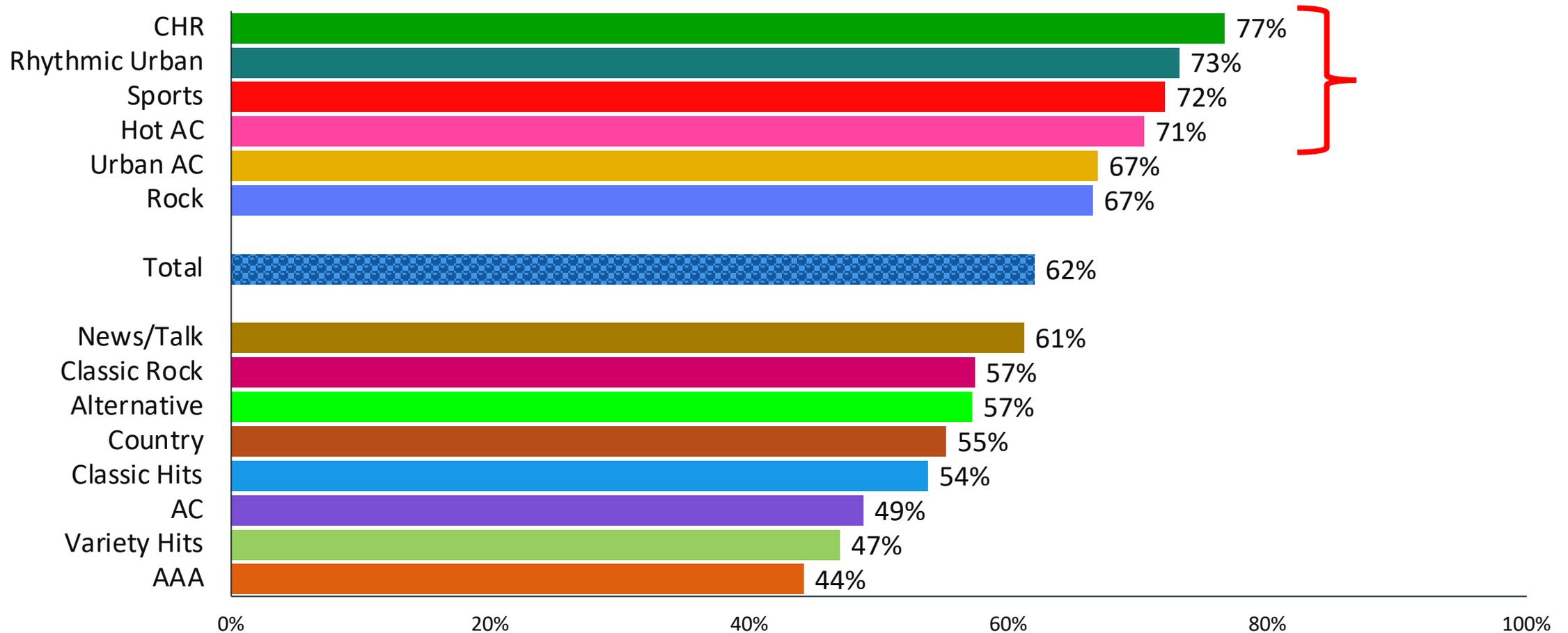
“I Like Particular DJs, Shows, or Hosts”



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

Fans of CHR, Rhythmic Urban, Sports, and Hot AC Are Most Apt to Strongly Value Radio's Personalities

"I Like Particular DJs, Shows, or Hosts"

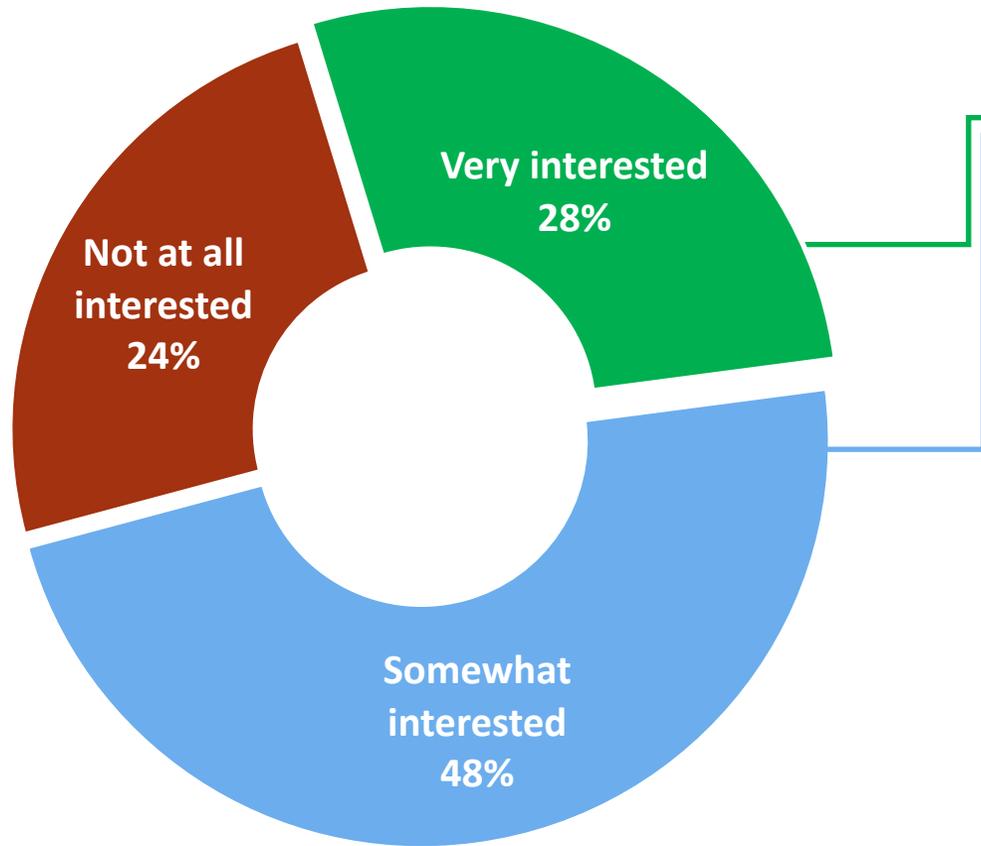


Among those who listen to AM/FM radio,
% who say this is a main reason they listen

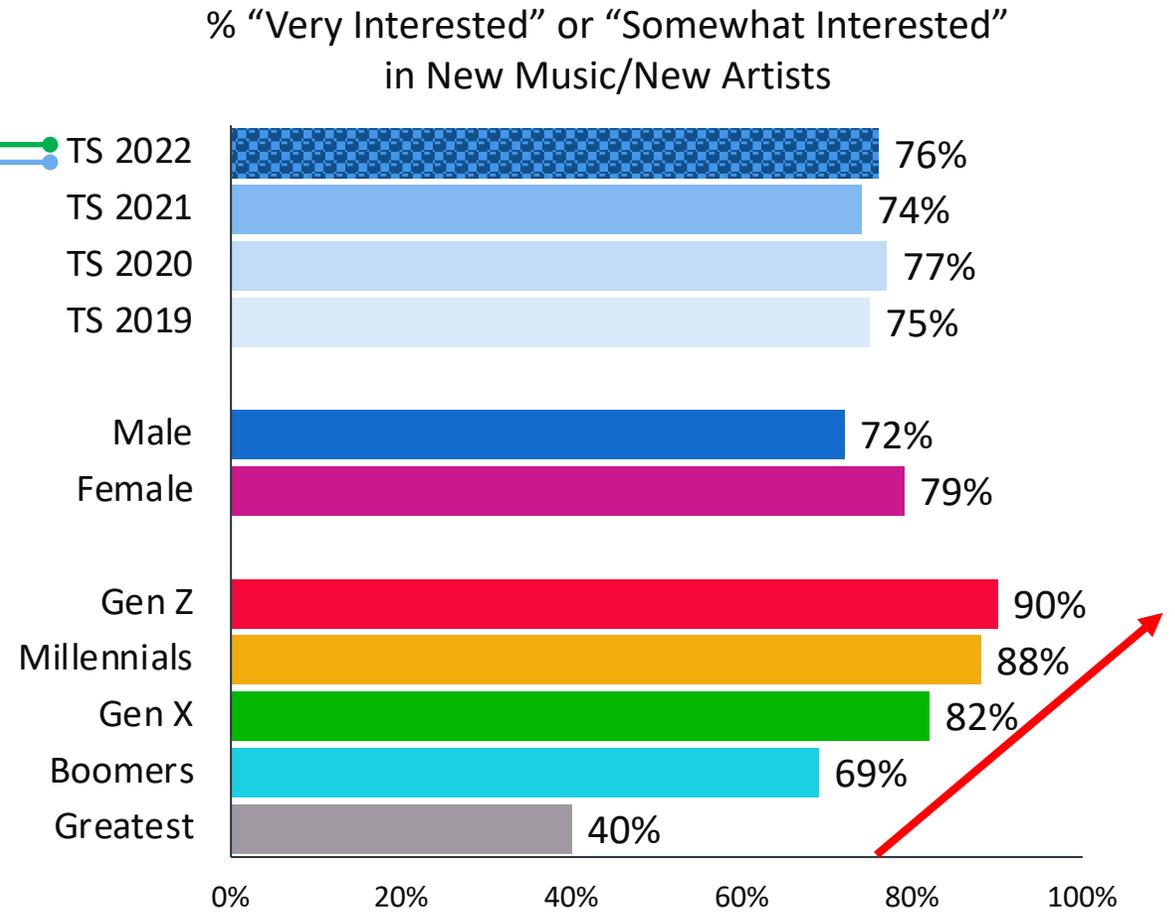


**Do radio fans actually care
about new music discovery?**

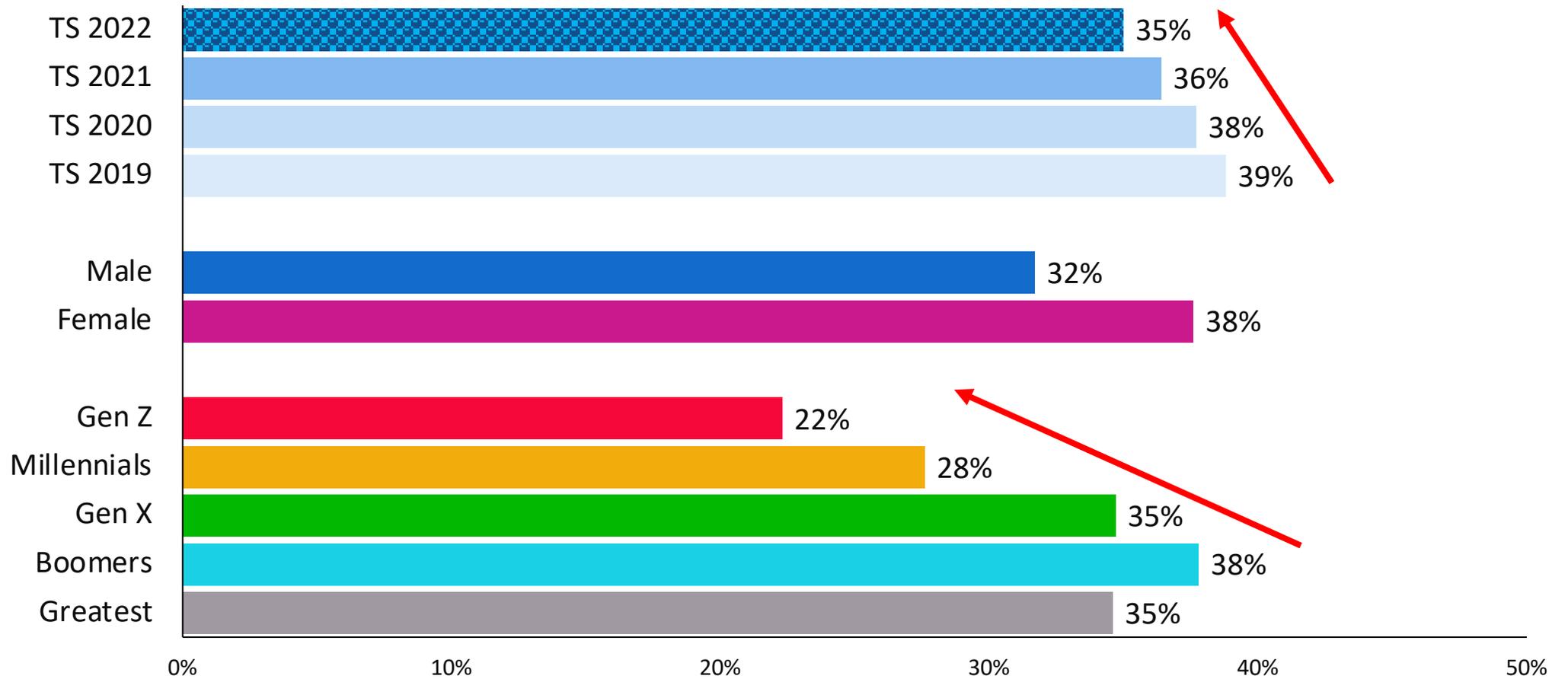
Of Those Into New Music/Artists, Young People Lead the Way, But Xers and Boomers Express Interest, Too



“How interested are you in discovering new music and new artists? ?”



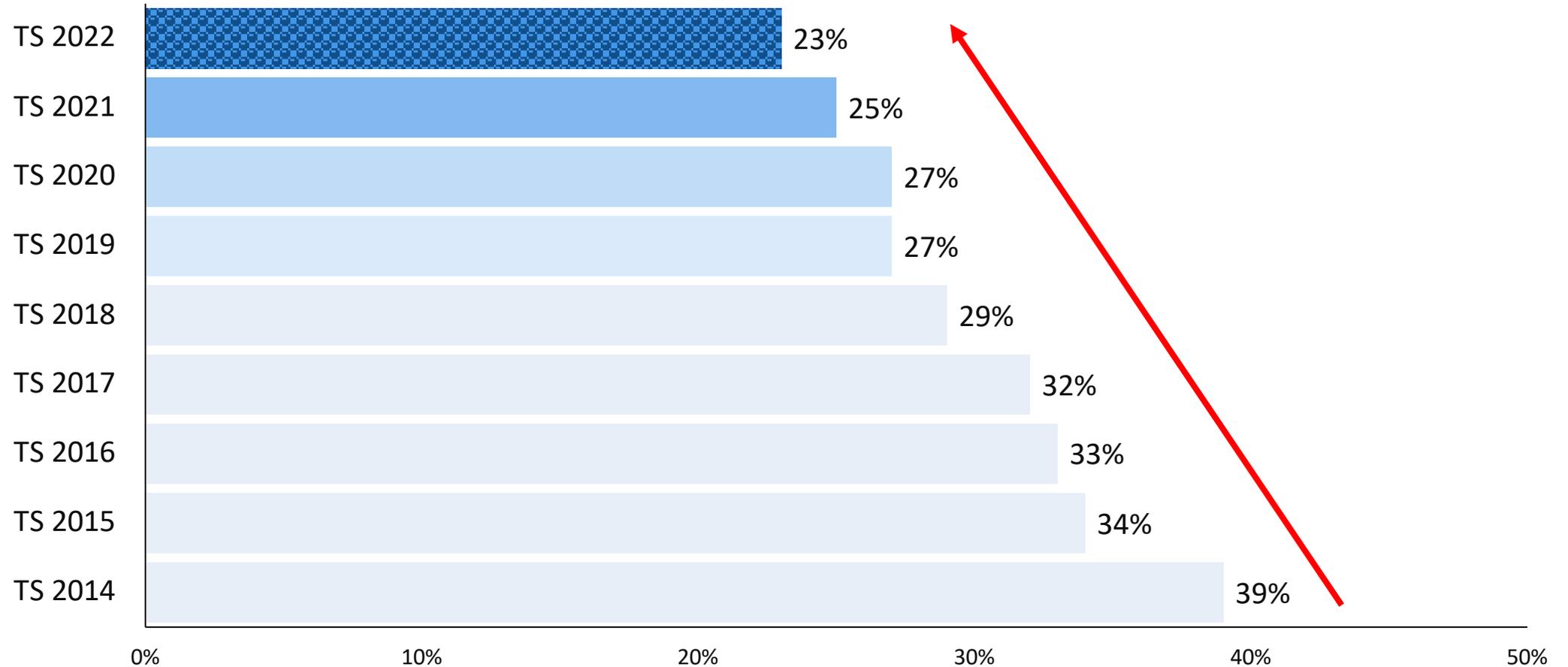
Among Core Fans, AM/FM Is Still Primary For Music Discovery, But Radio Is Trending Down



Among the 76% interested in new music/artists, who use AM/FM radio (on any device) as their primary source for discovering new music/artists

New Music Discovery Plays a Diminishing Role in Broadcast Radio's Appeal

"I Want to Discover New Music/New Artists"

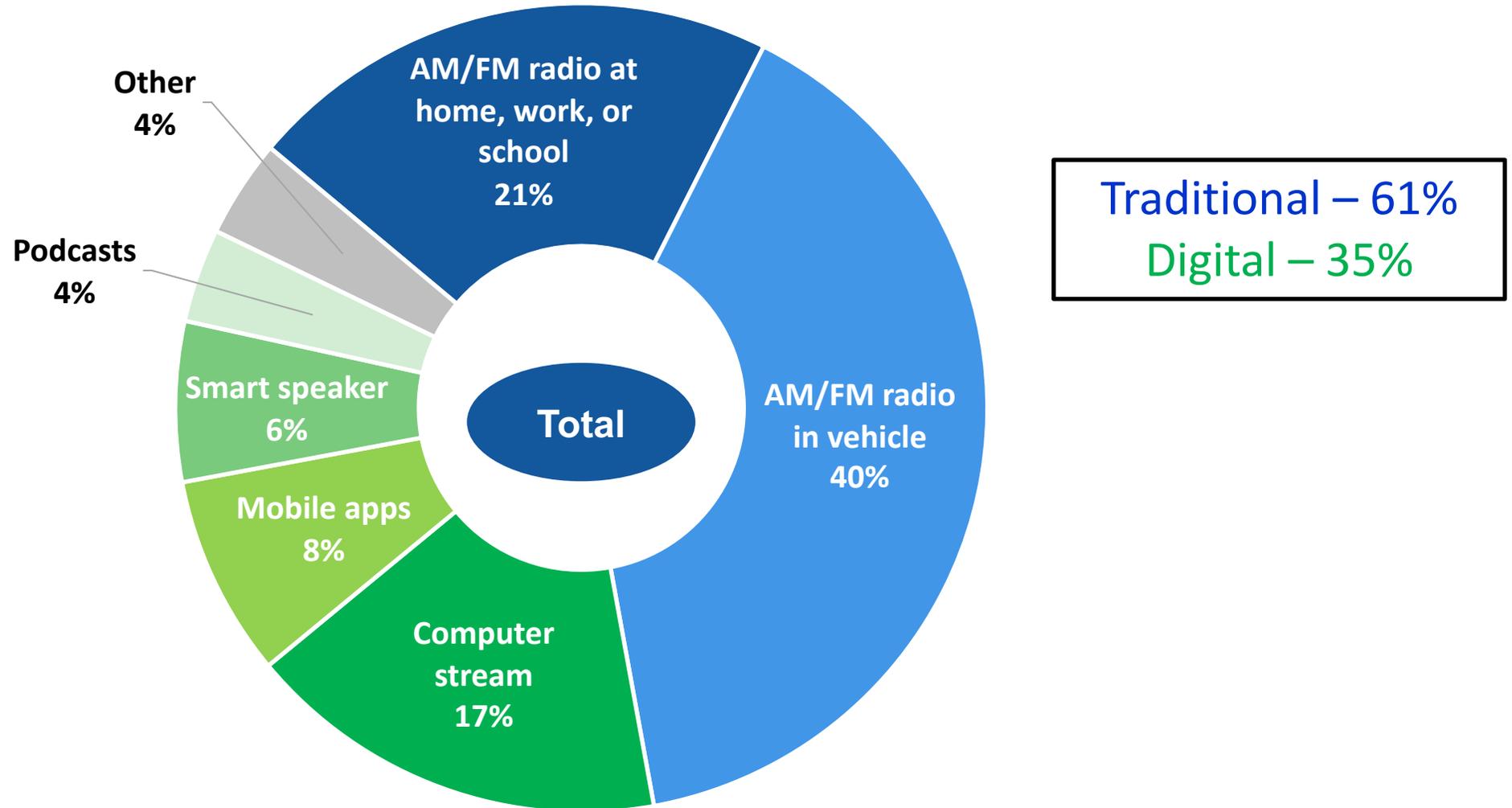


Among those who listen to AM/FM radio,
% who say this is a main reason they listen

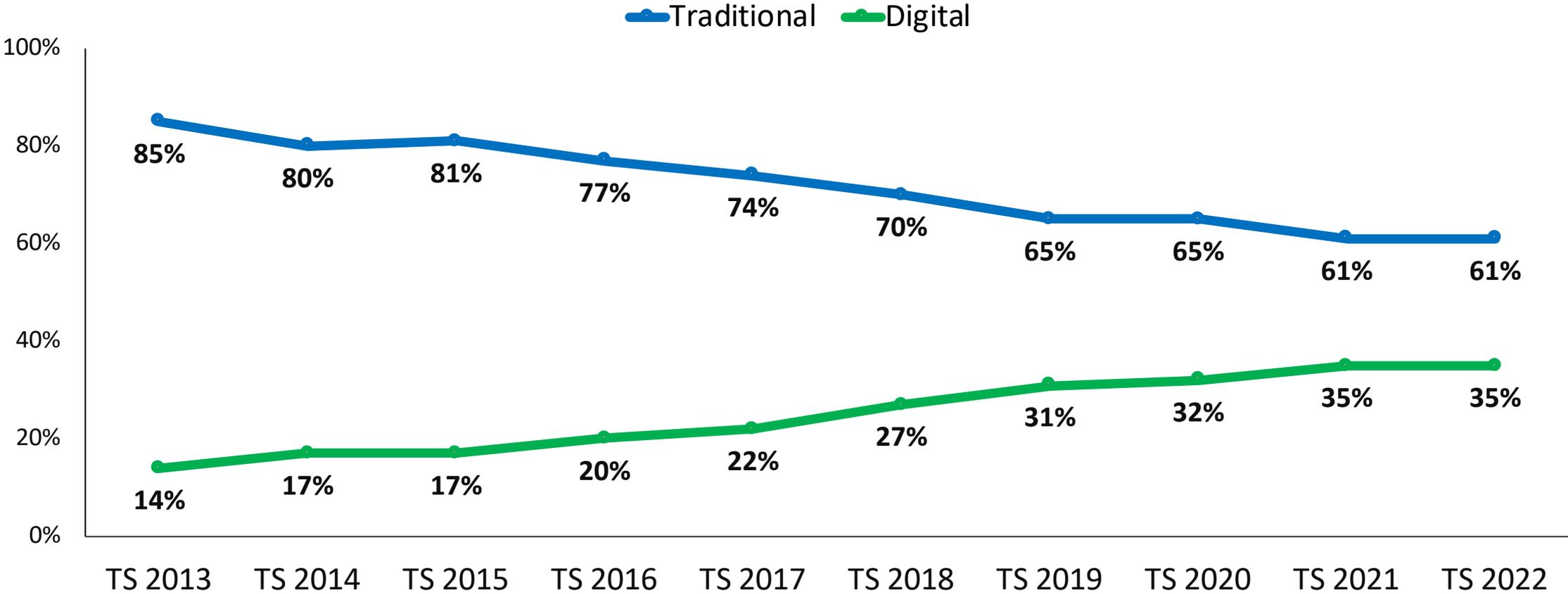


Digital continues to play a major role in the radio listening experience – especially among younger generations

How Do Radio Fans Listen to Their Favorite Stations?

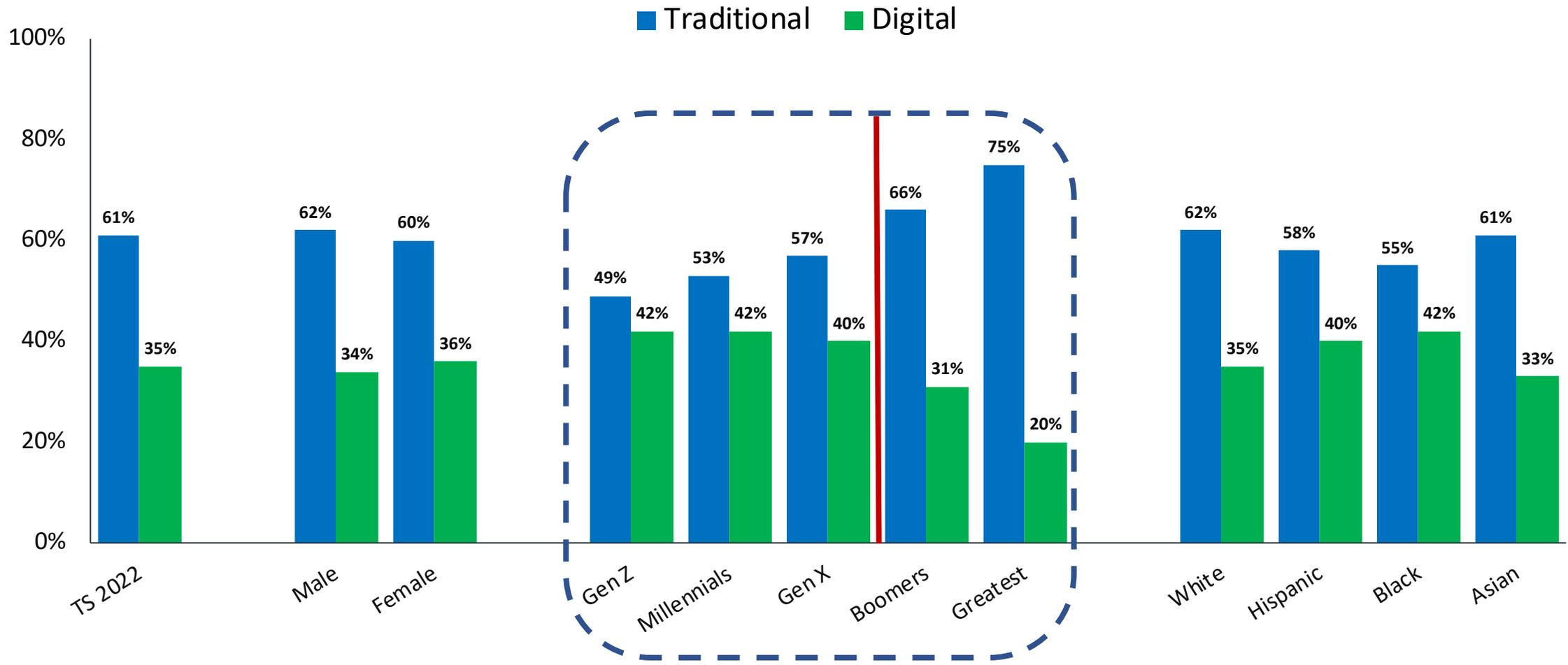


P1 Station Listening Platform Trend: Traditional vs. Digital



% 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)

P1 Station Listening Platforms: 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)



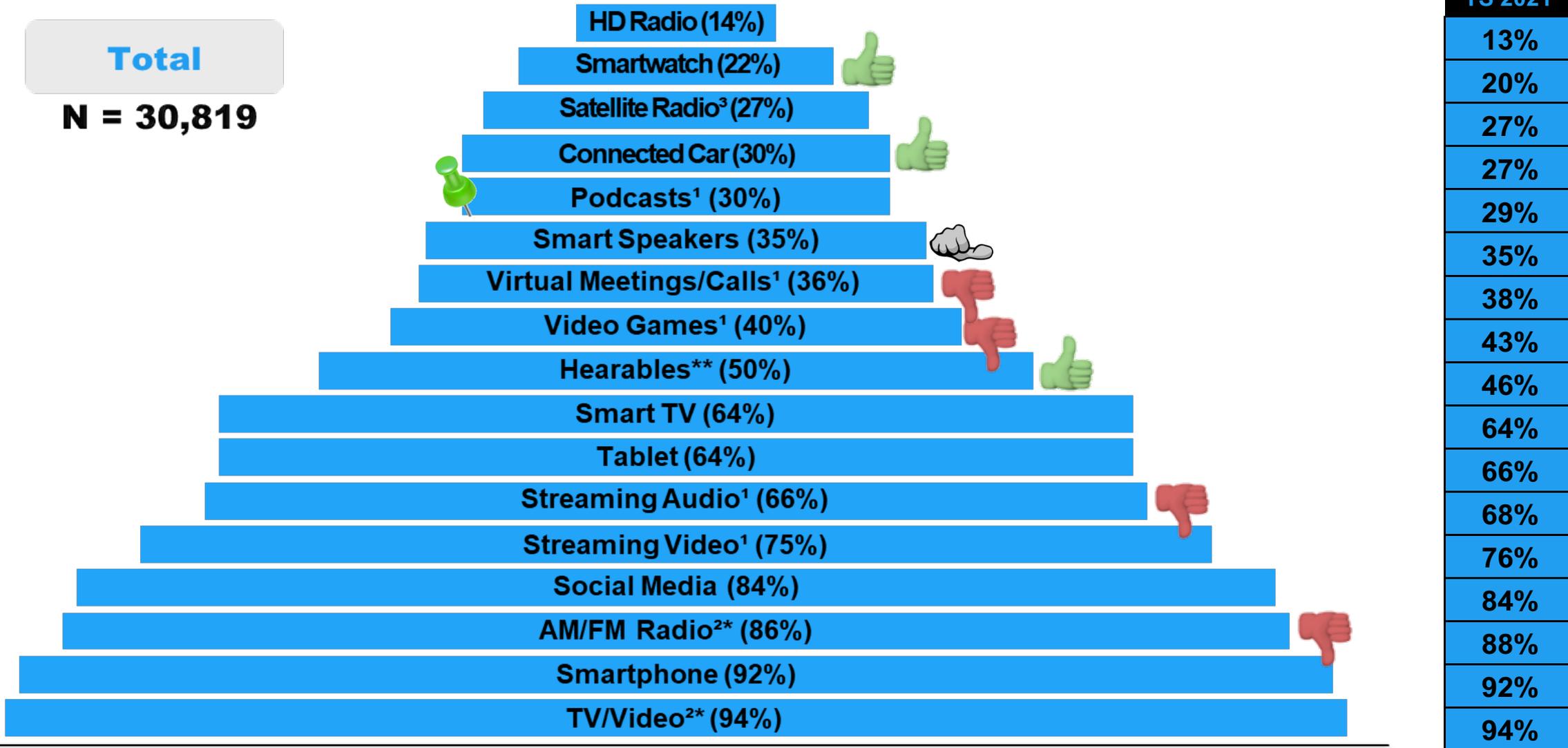
Media Usage & Brand Pyramids



Media Pyramid 2022

Total

N = 30,819



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



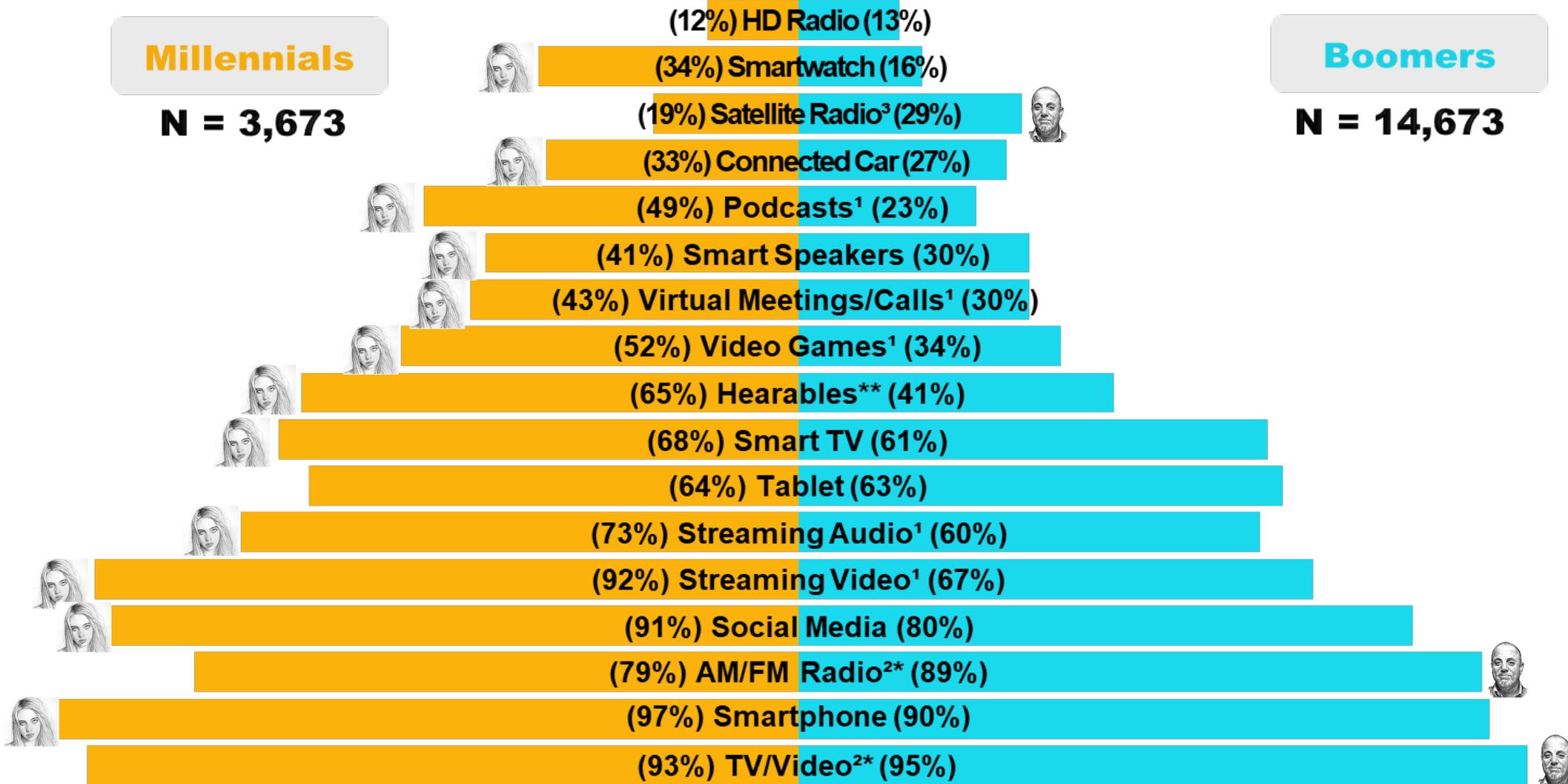
Media Pyramid 2022

Millennials

N = 3,673

Boomers

N = 14,673



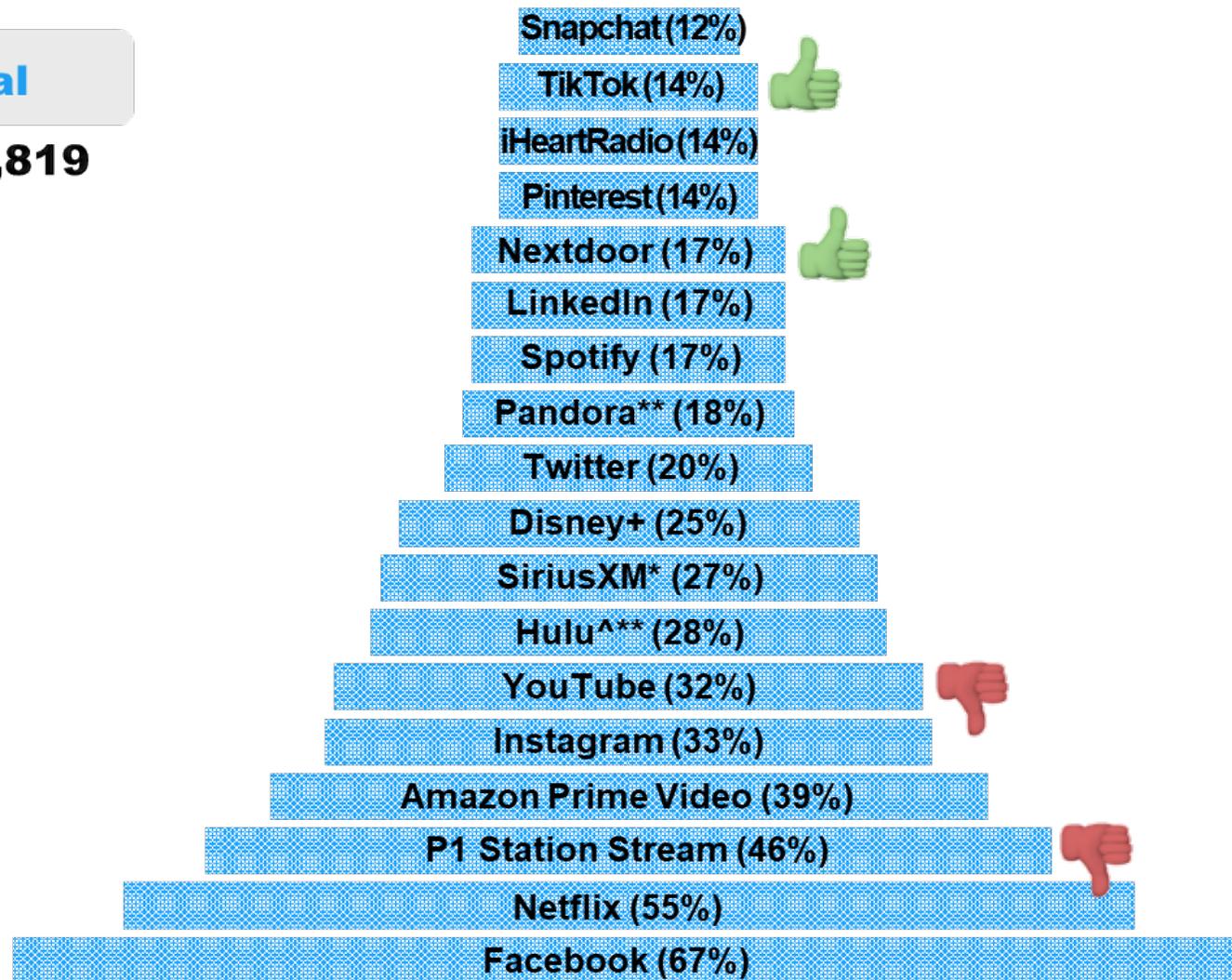
¹ Weekly or more ² 1+ hour per day ³ Paid & trial users *Any platform/device **Wireless headphones/earbuds



Brand Pyramid 2022

Total

N = 30,819



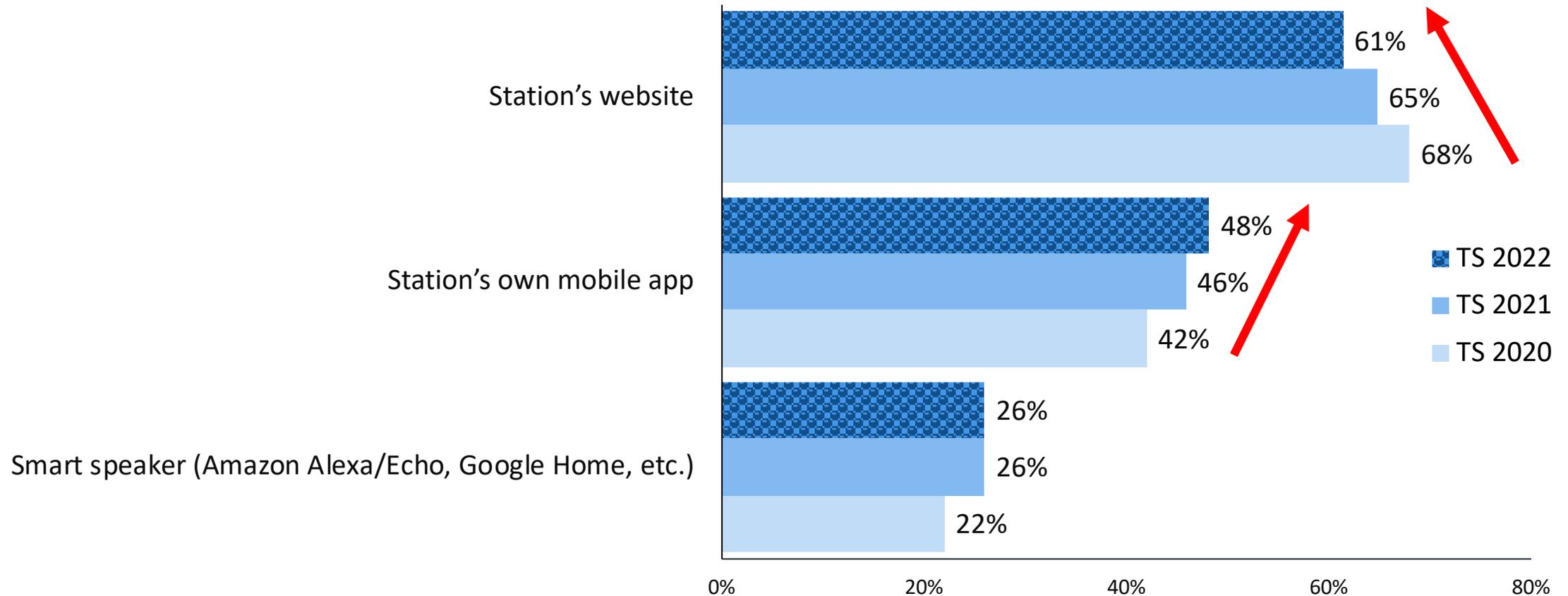
| Total TS 2021 |
|---------------|
| 12% |
| 8% |
| 16% |
| 15% |
| --- |
| 16% |
| 17% |
| 20% |
| 20% |
| 26% |
| 27% |
| 26% |
| 42% |
| 31% |
| 40% |
| 50% |
| 56% |
| 68% |

All weekly use except SiriusXM (*Paid & trial users) **Excluding Canada ^Includes Live TV



Mobile devices and apps continue their amazing growth trajectory.

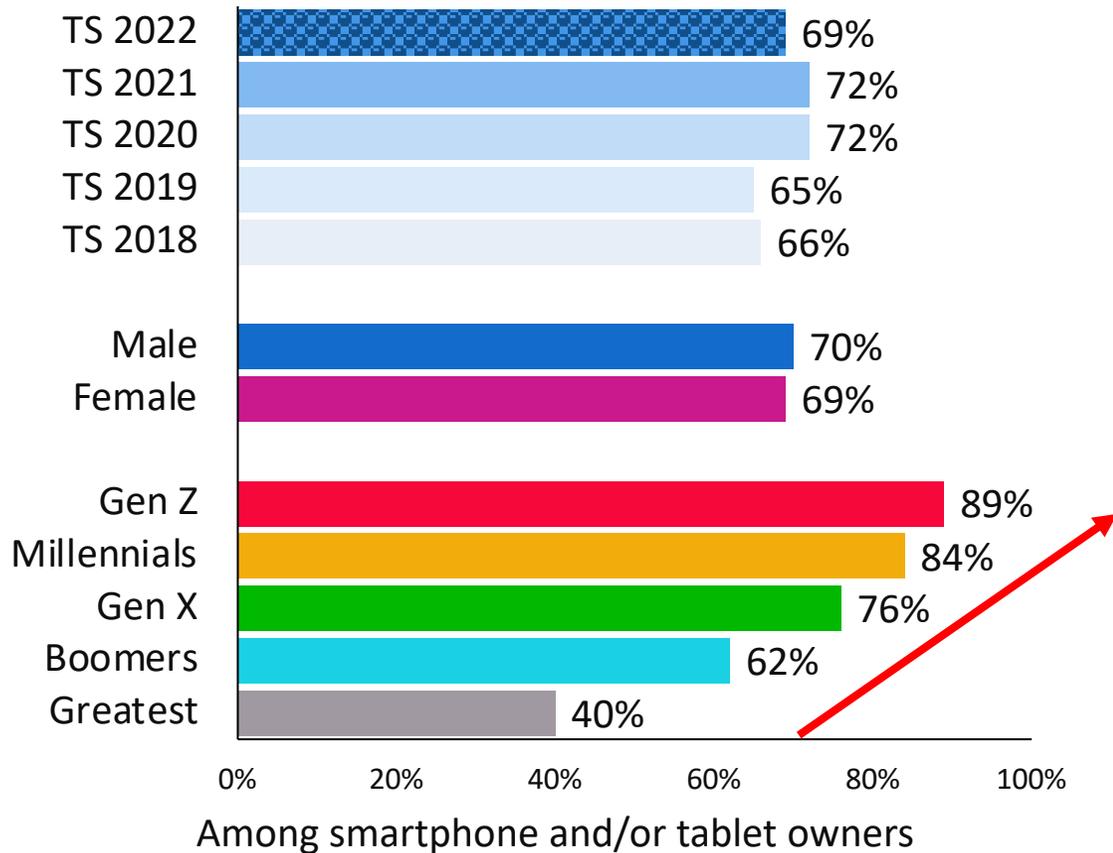
Mobile Apps Continue to Play a Larger Role in P1 Station Streaming



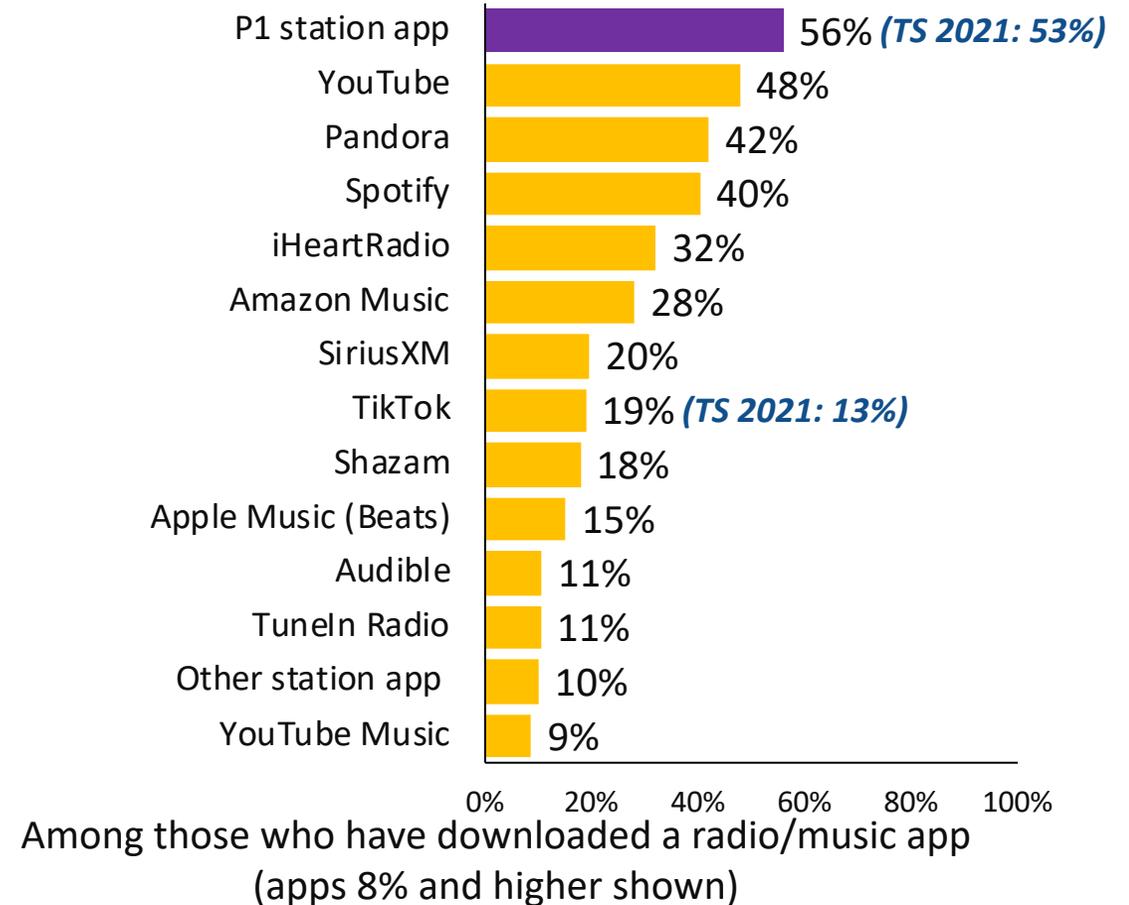
Sources used to listen to the P1 station's audio stream, among those who listen to streaming audio at least monthly and listen to the P1 station stream at least weekly (multiple responses accepted)

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

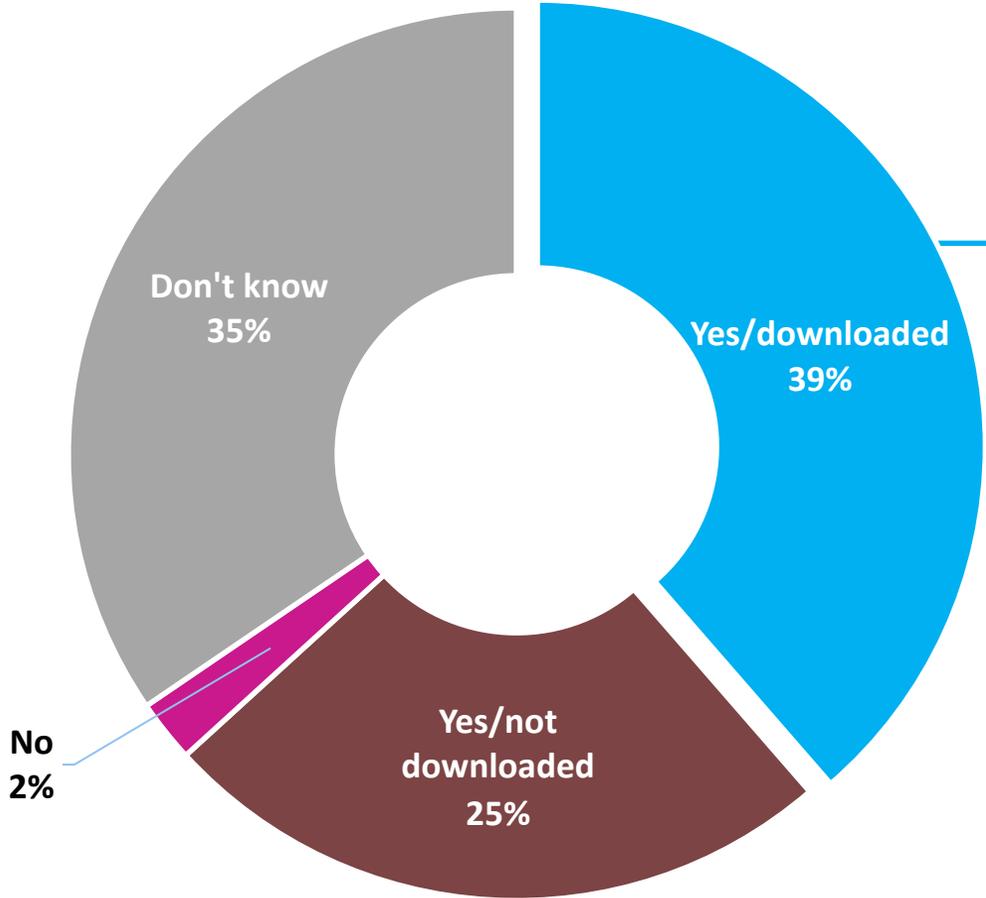
% Who Have Downloaded a Radio/Music App



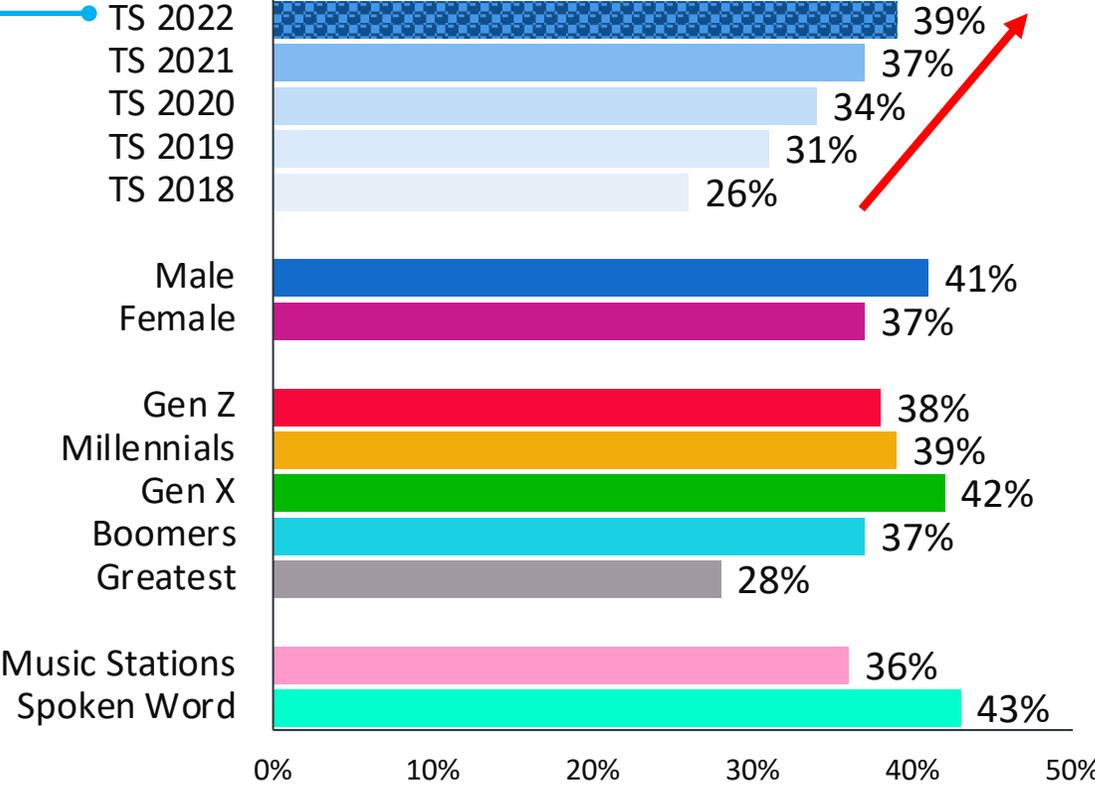
% of Smartphone/Tablet Owners Who Have Downloaded Each Radio/Music App



Most Mobile Device Owners Are Aware Their P1 Station Has an App; Four in Ten Have Downloaded It



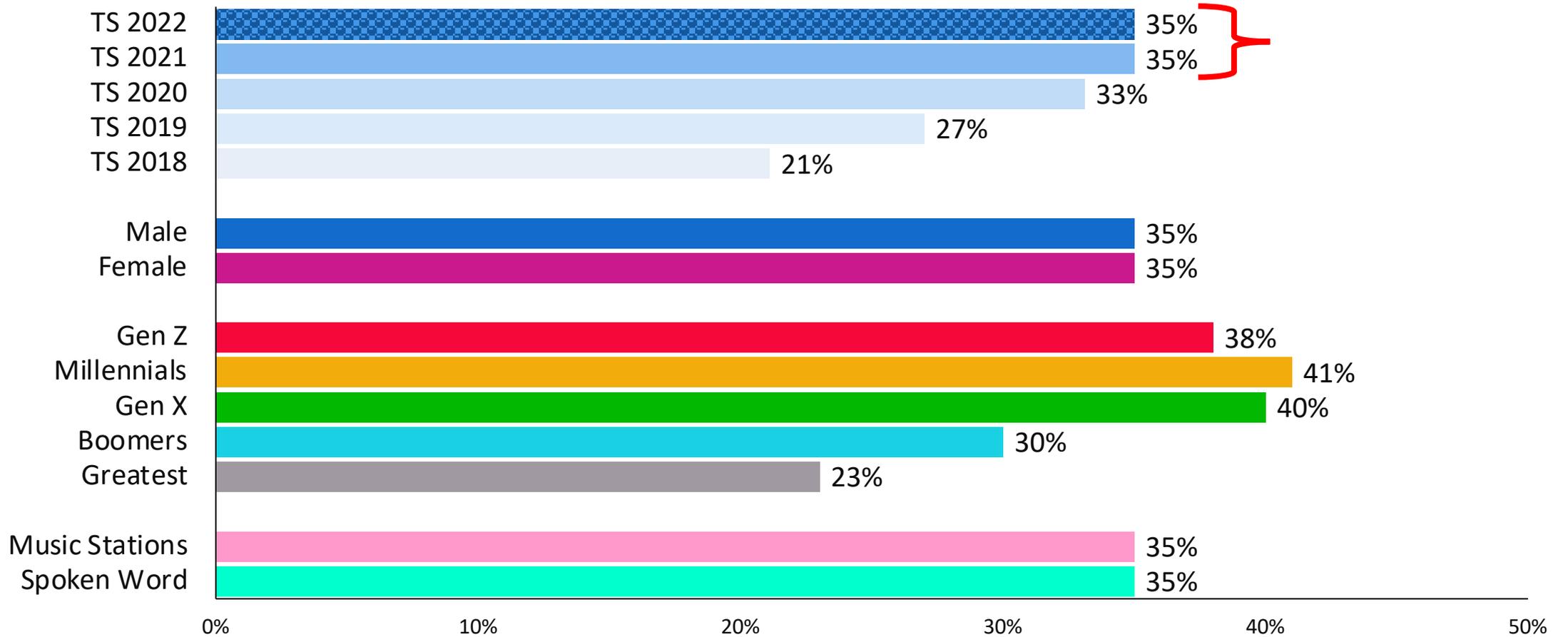
% of Smartphone/Tablet Owners Who Have Downloaded P1 Station App





**Smart speaker
penetration has
flatlined, but
current owners
keep buying
more of them**

Smart Speaker Growth Has Stalled

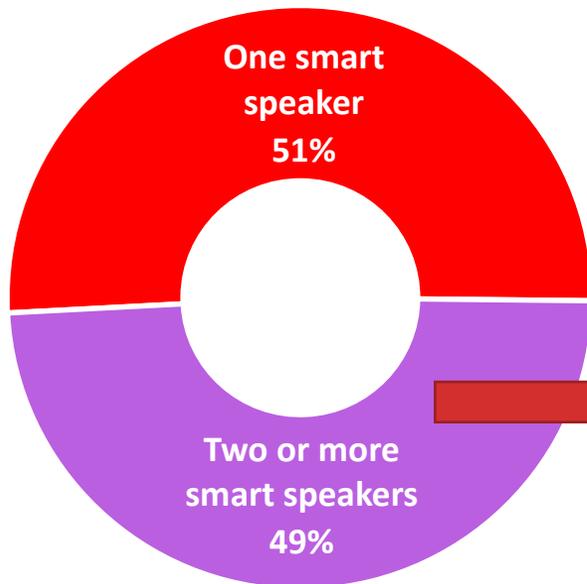


% who own a smart speaker (Amazon Alexa, Google Home, etc.)

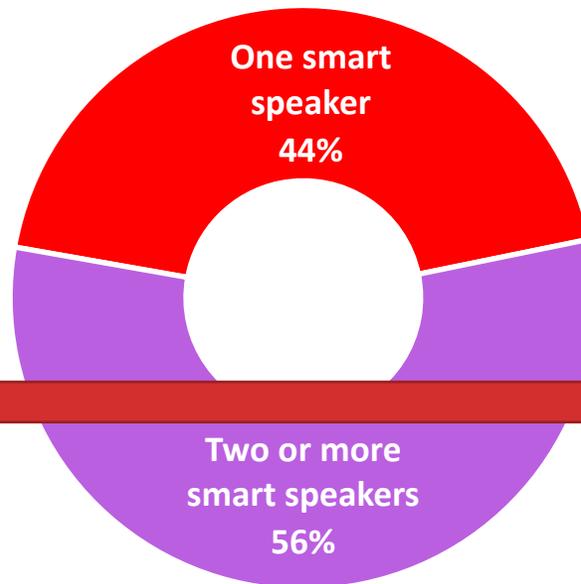
Despite the Same Level of Smart Speaker Owners Overall, There Are More of These Devices Owned in Total

% of Smart Speaker Owners Who Own...

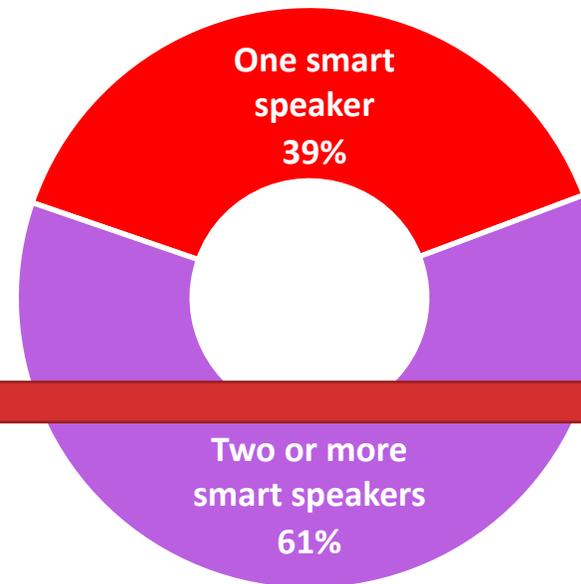
TS 2019



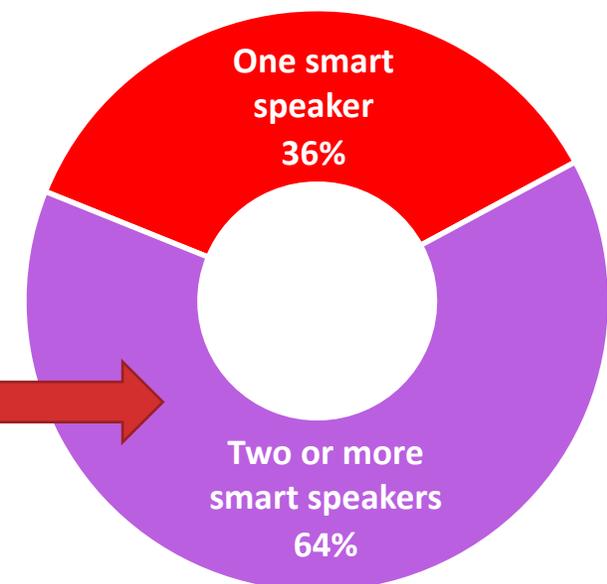
TS 2020



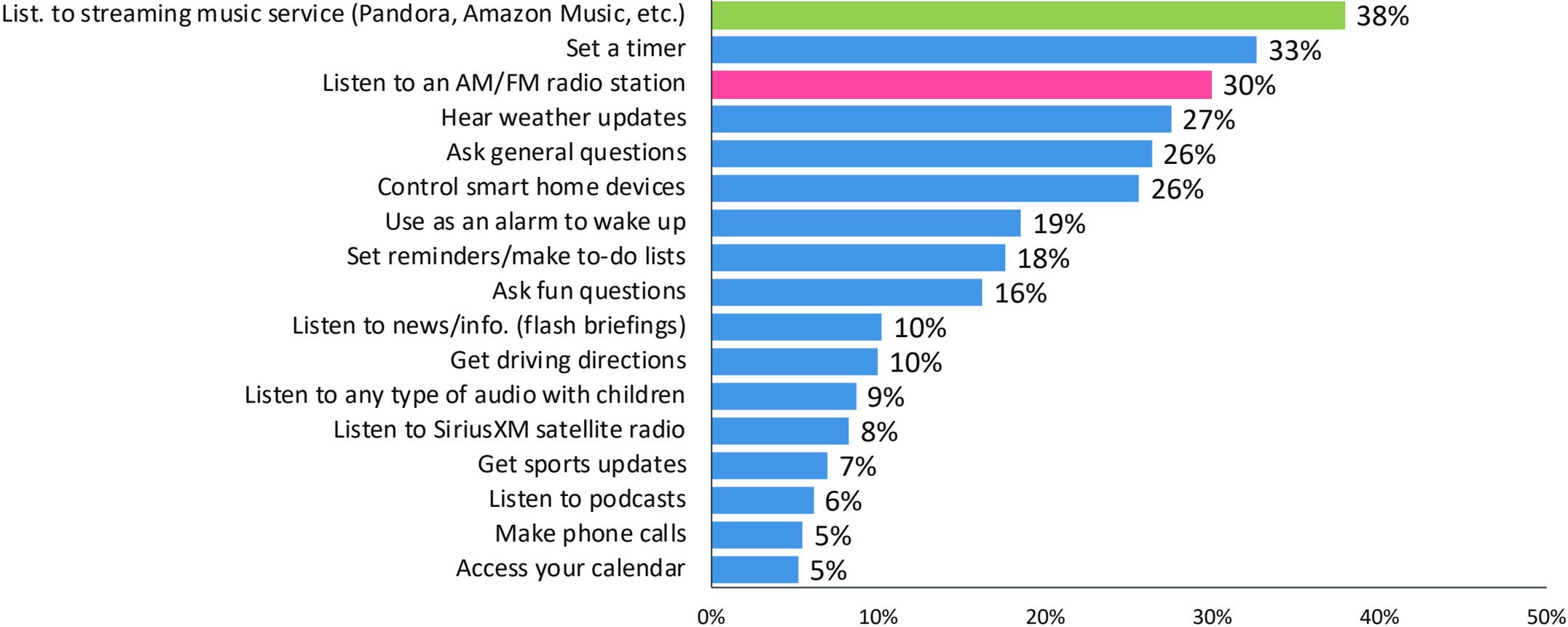
TS 2021



TS 2022



Listening to Streamed Music Tops the List of Frequent Uses For Smart Speakers; Listening to an AM/FM Radio Station Firmly in Third

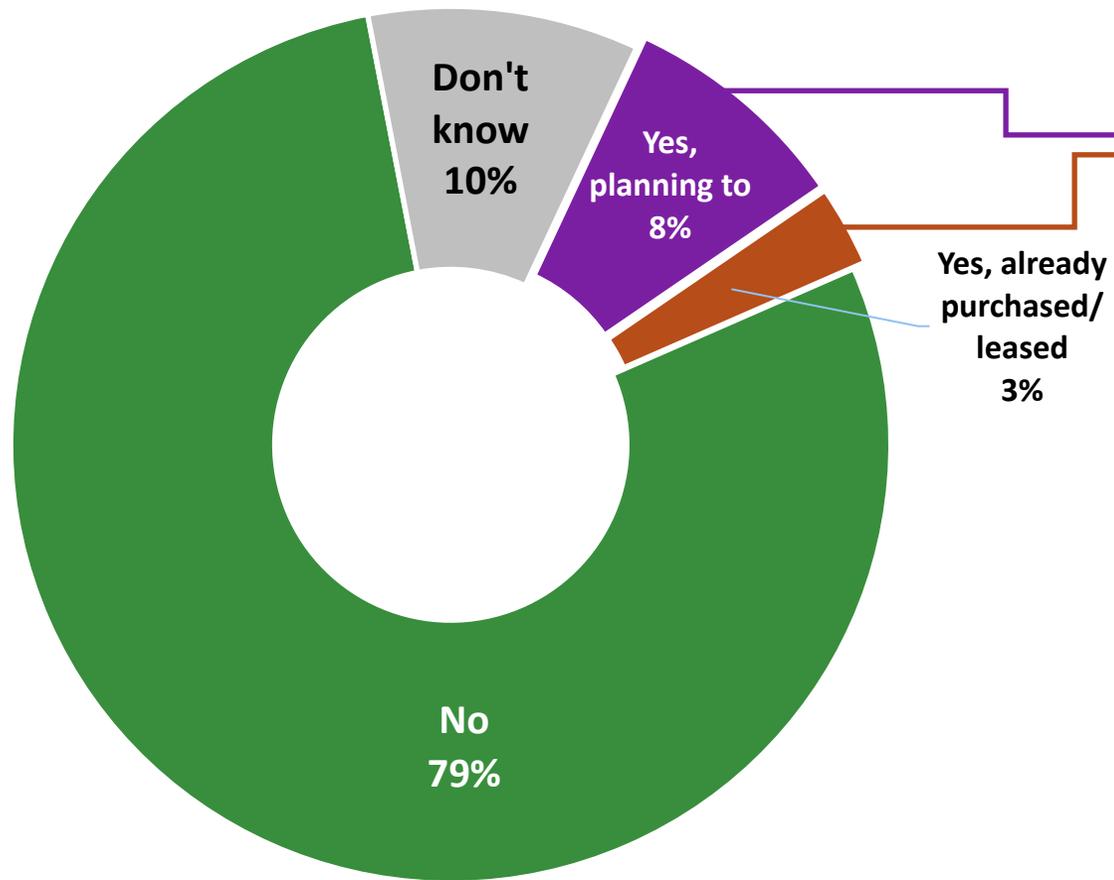


% of smart speaker owners who “frequently” use their device(s) in each way



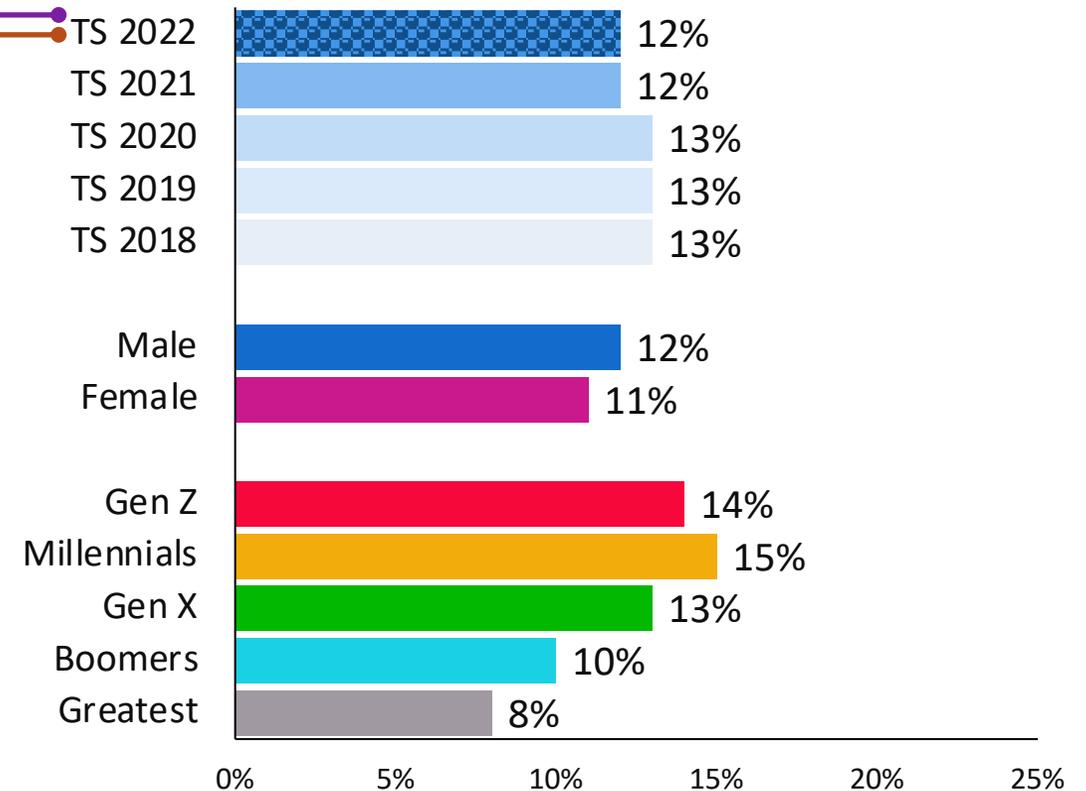
The car dashboard is changing...and so are driver preferences

About One in Eight Plans to (or Already Has) Purchase/Lease a New Vehicle in 2022

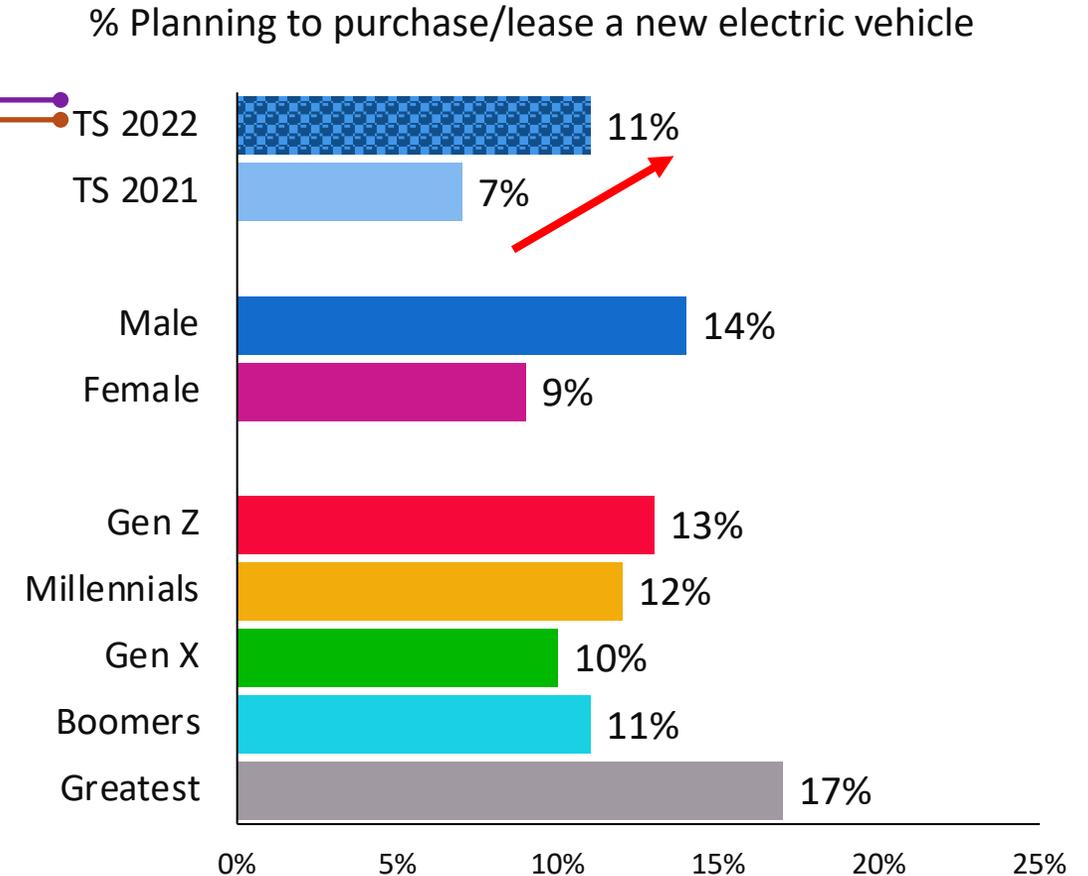
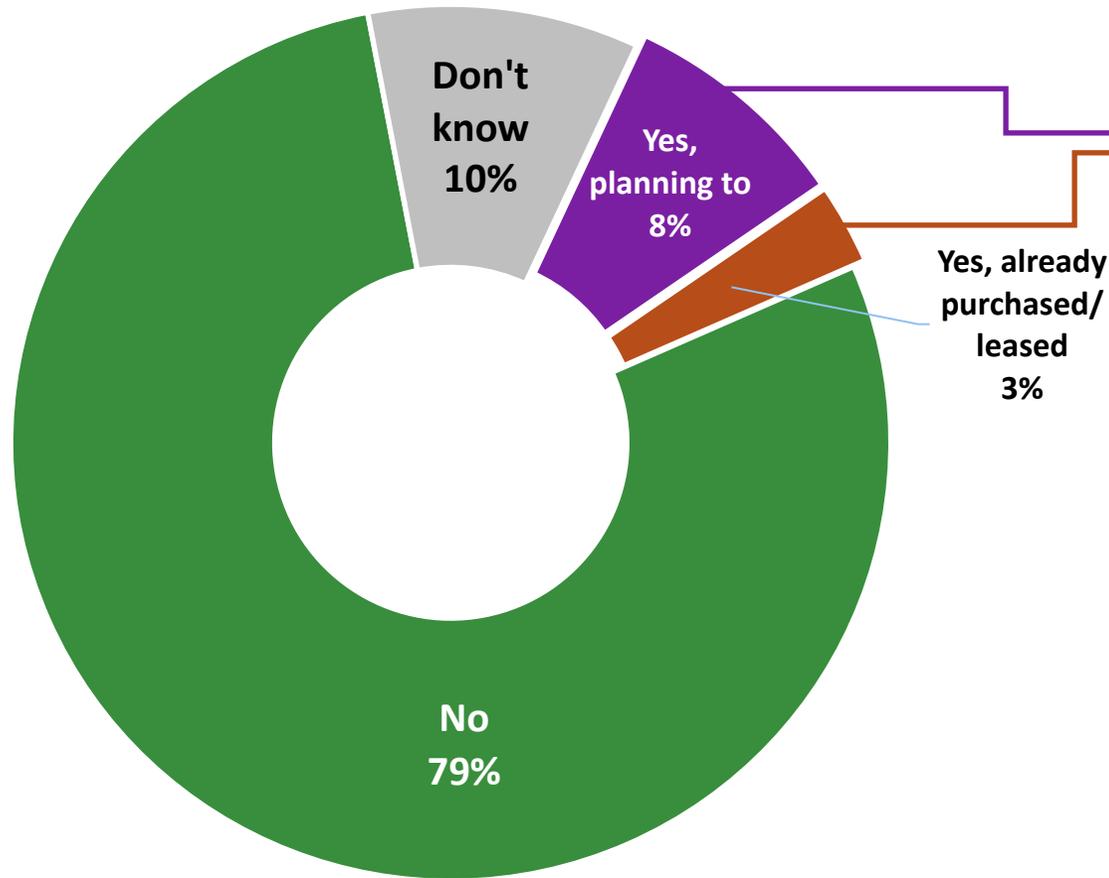


"Are you personally planning on buying or leasing a new vehicle in 2022?"

% Planning to Purchase/Lease or Already Purchased/Leased a New Vehicle in 2022



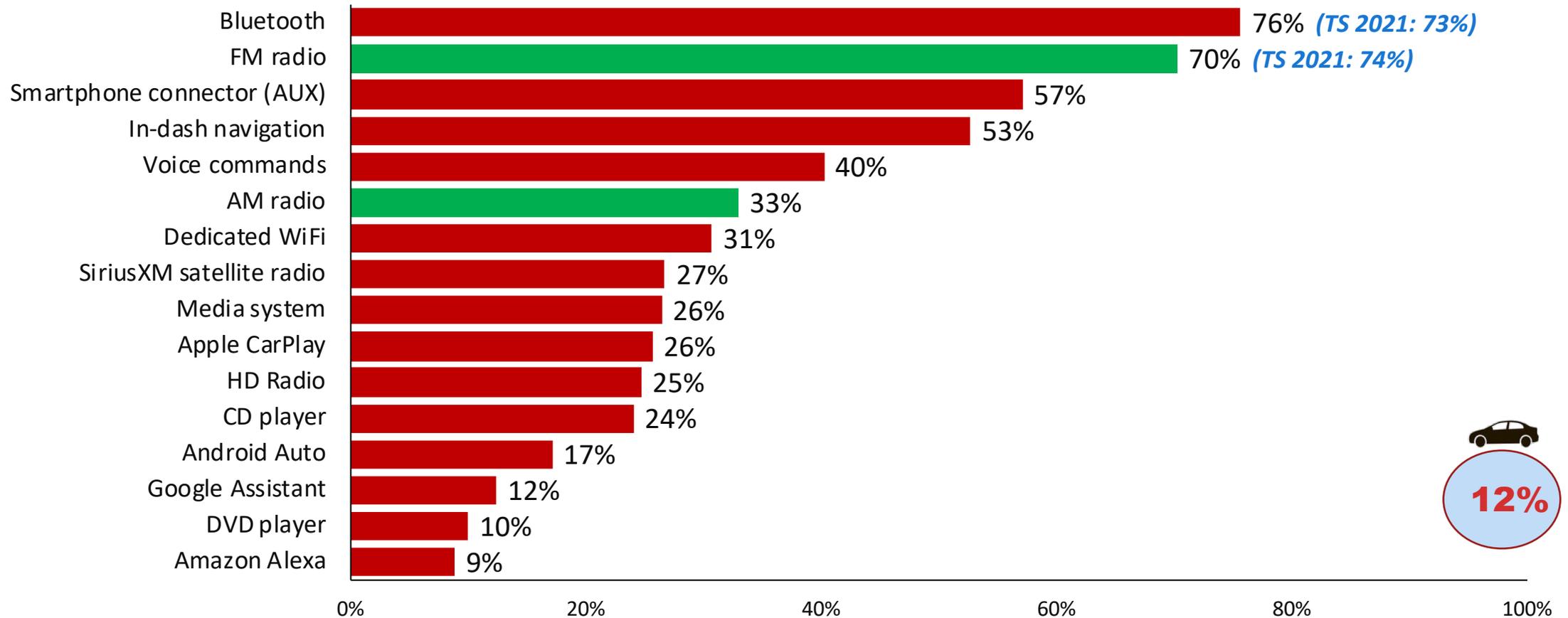
Planned Electric Vehicle Purchases (Among All Planned Purchasers) Has Increased Year-Over-Year



"Are you personally planning on buying or leasing a new ELECTRIC vehicle in 2022?"

Of those planning to purchase/lease a new vehicle in 2022

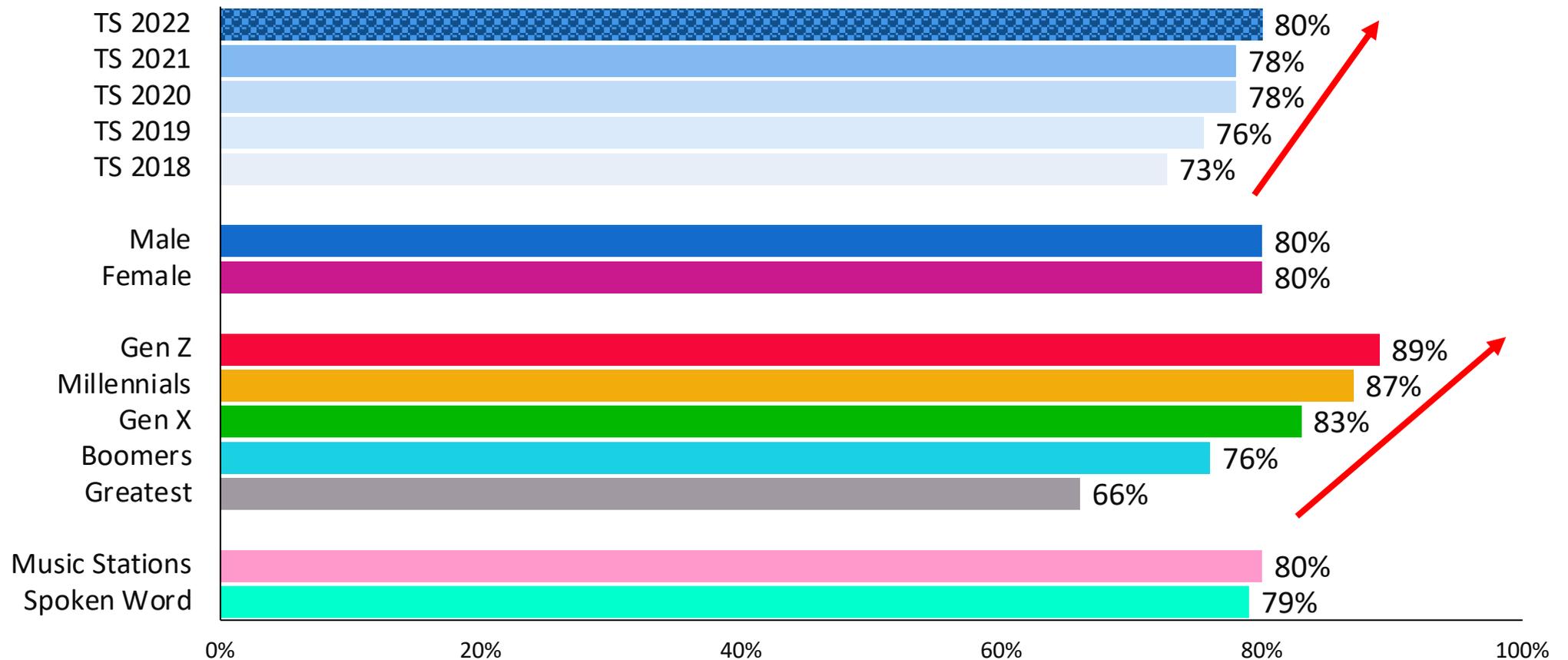
In a First, Bluetooth Overtakes FM Radio as the Most Important Feature Among New Car Buyers



“Very Important” features among those planning on buying/leasing (or already bought) a new vehicle in 2022

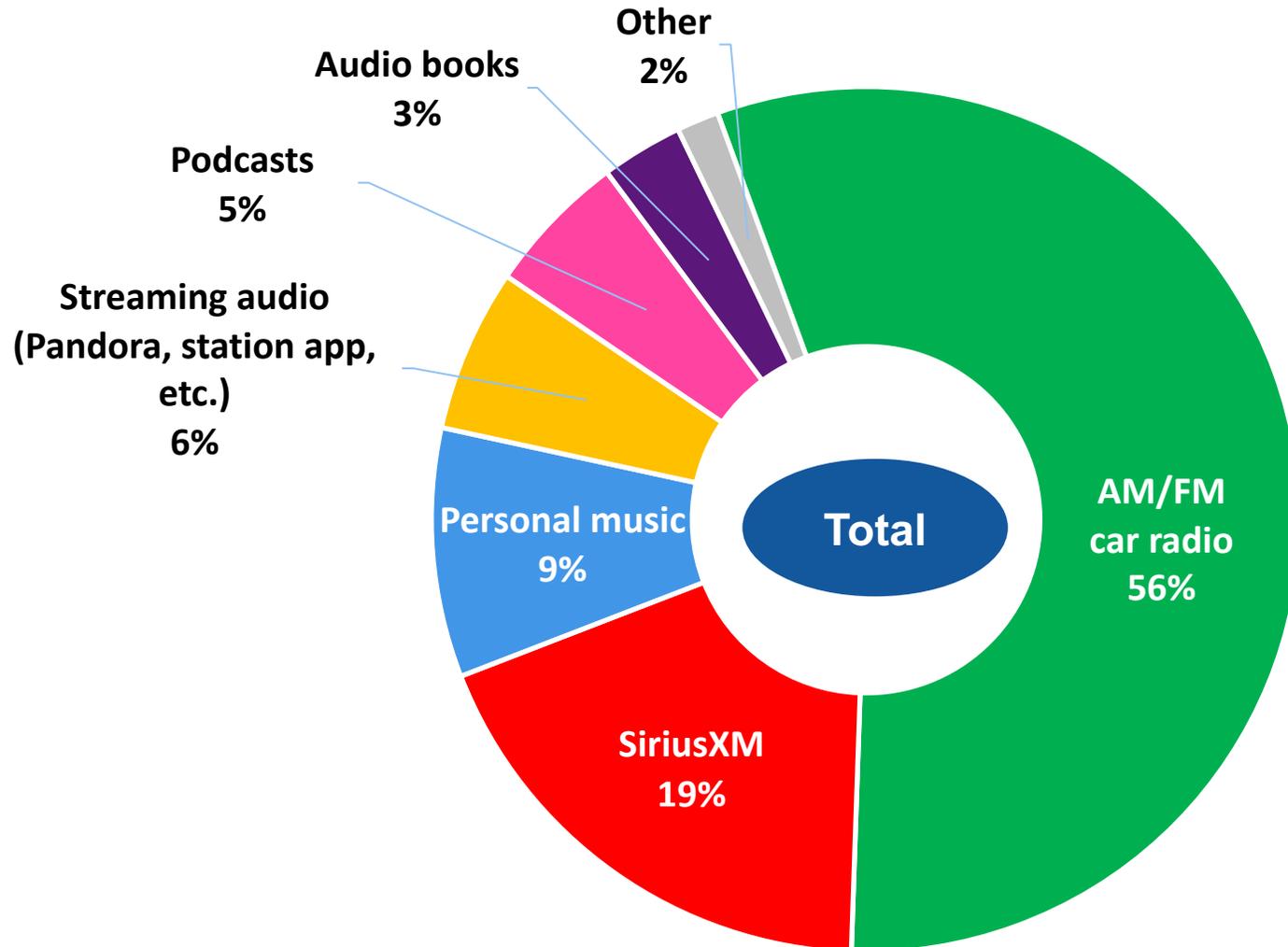


Hitting a New High, Eight in Ten Can Now Connect a Smartphone in Their Cars, Especially Younger Consumers

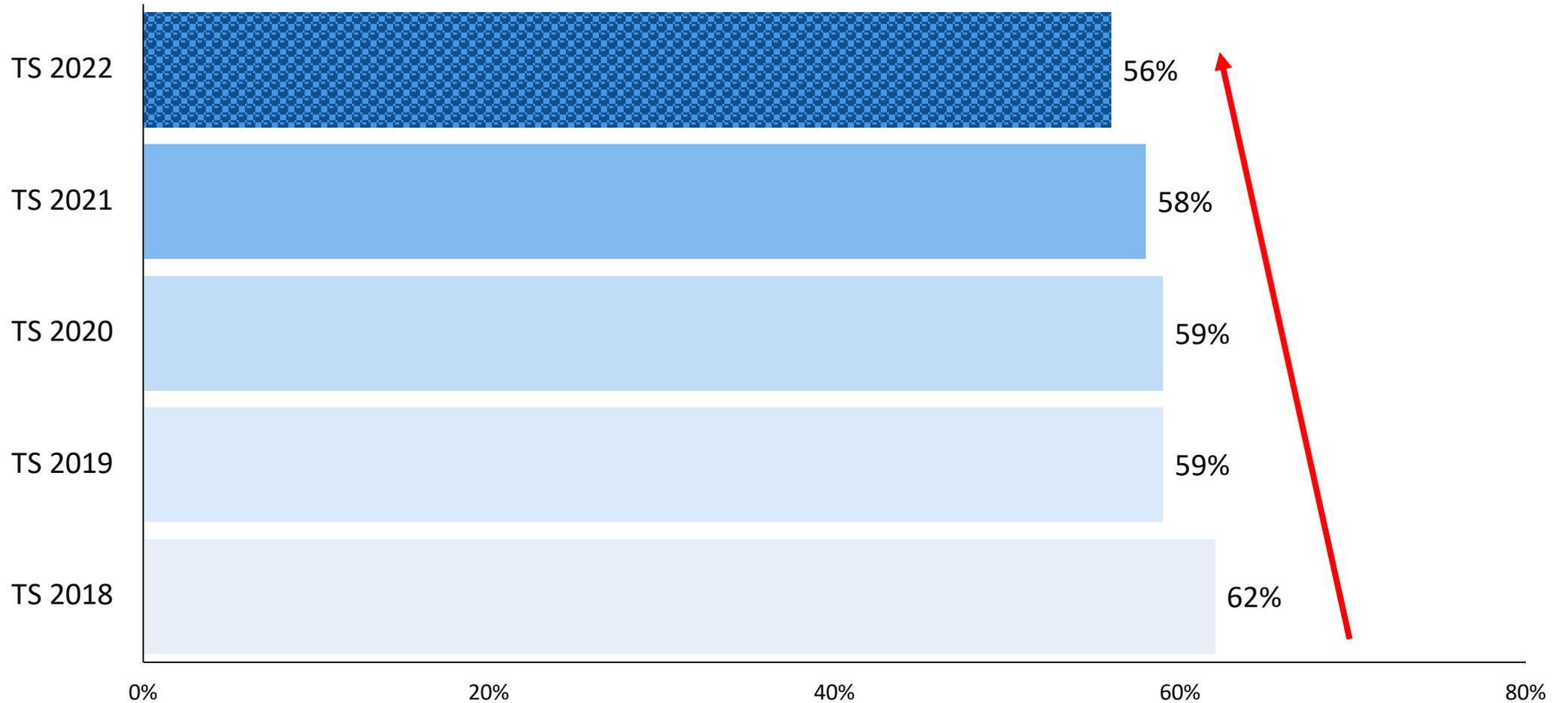


Among smartphone owners who spend time in a car,
% who have a way to connect their smartphone to their car

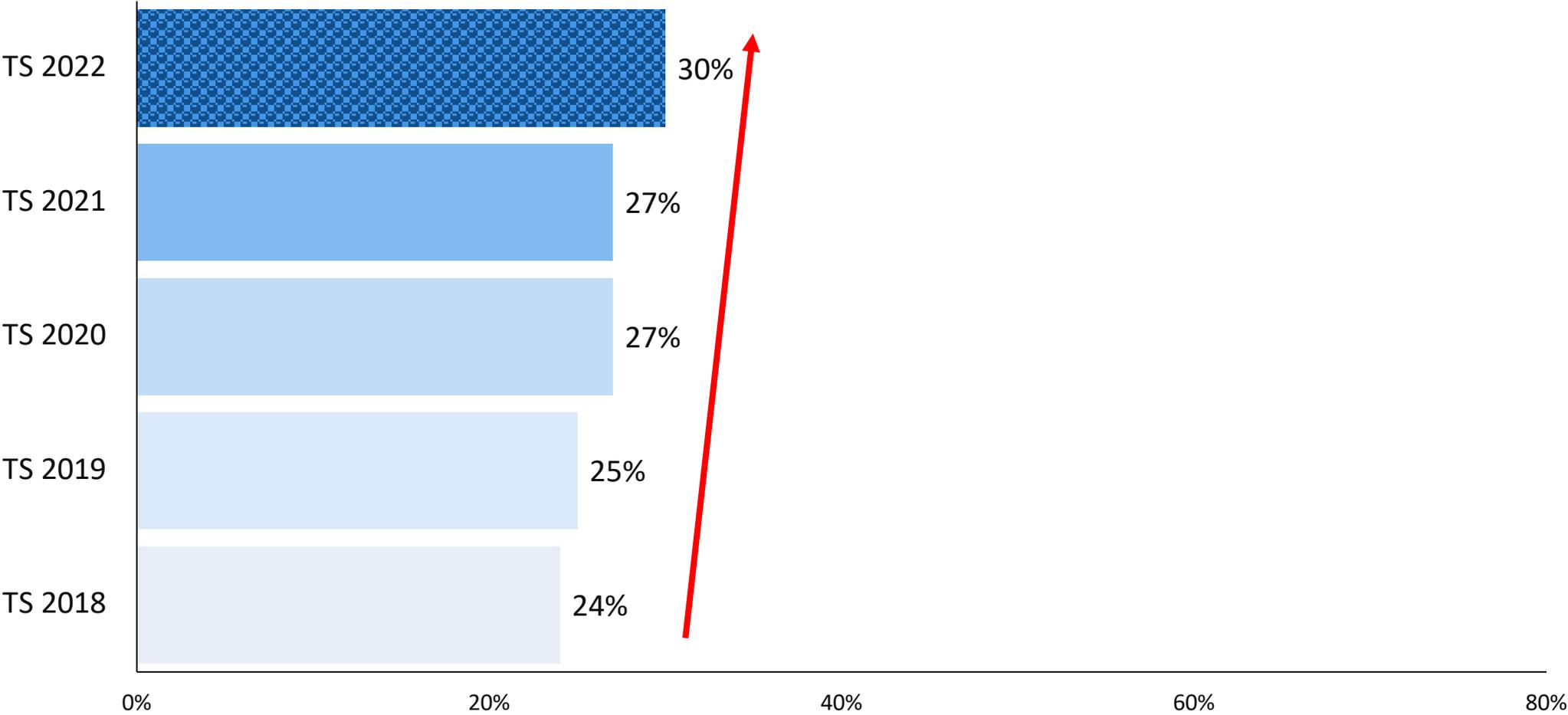
In-Car Audio Usage



AM/FM Radio Listening in the Car Continues to Erode

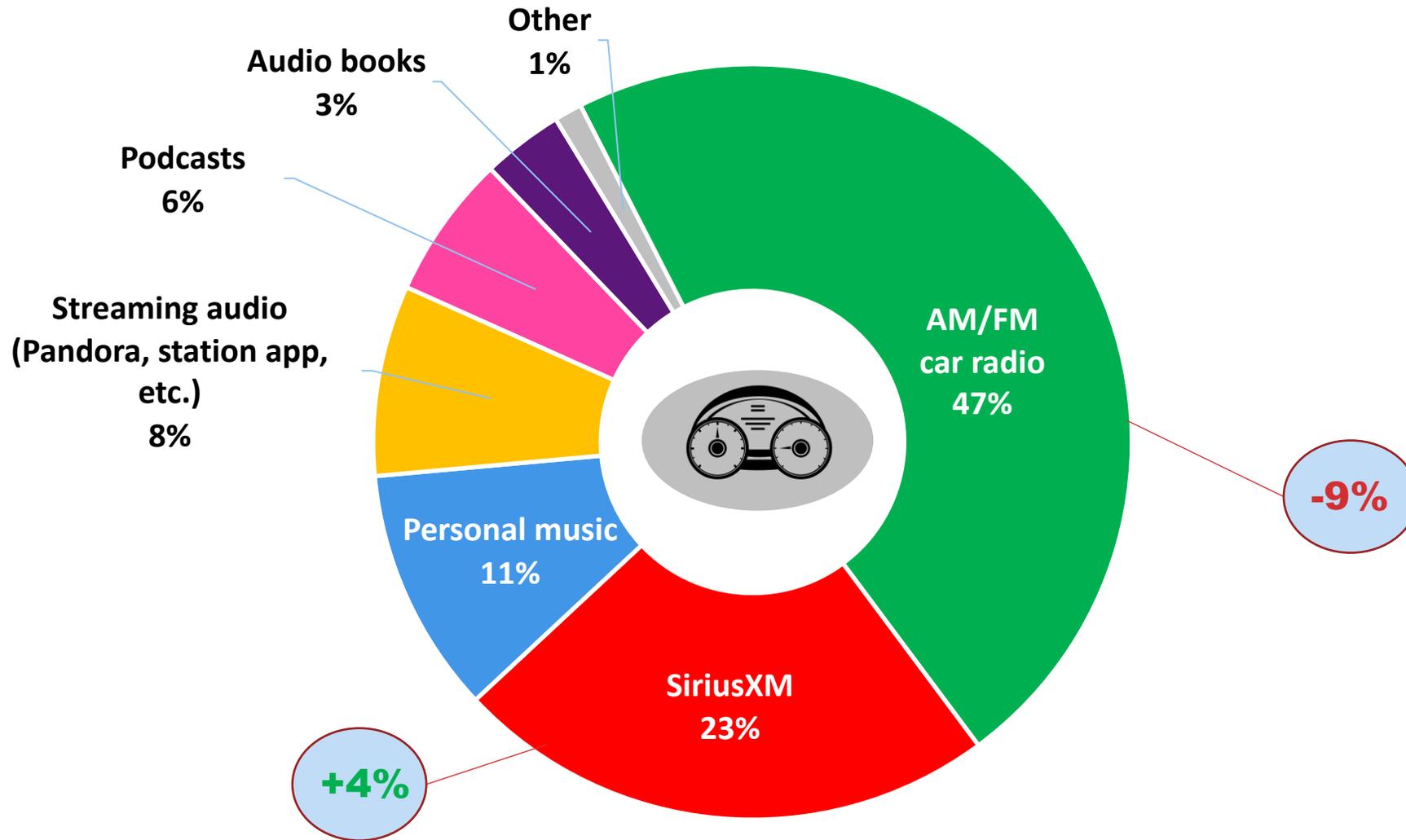


Three in Ten Now Own a Car Media System



% who own an in-car media system

Among Those Who Own Cars With a “Connected System,” a Majority of Time Spent With Audio Is Digital or SXM

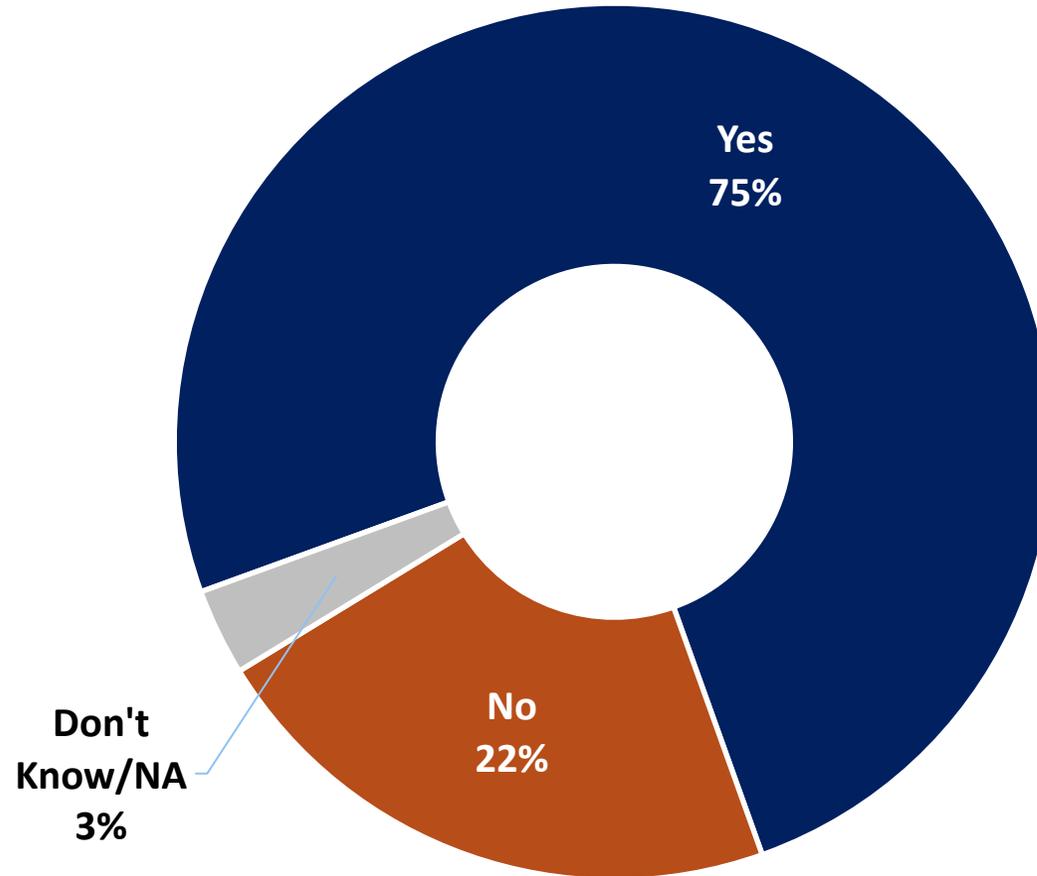




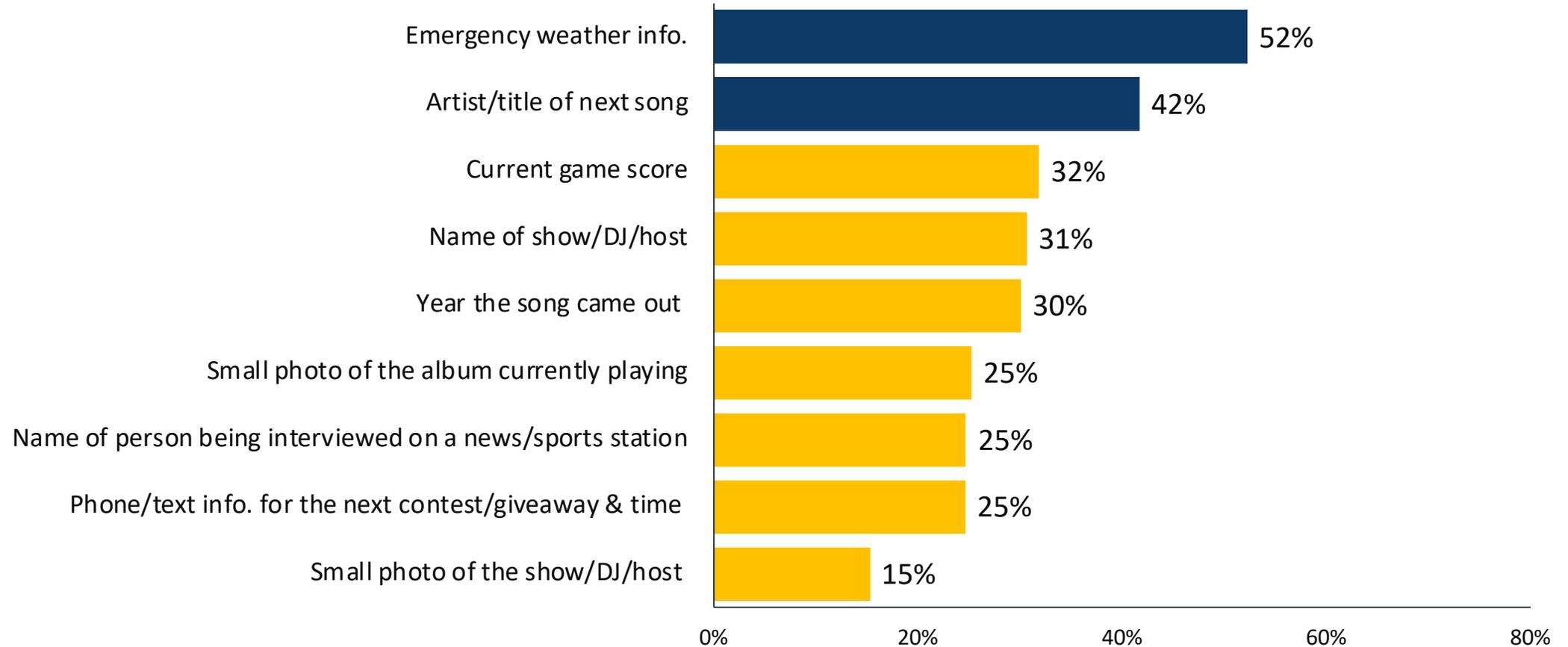
Beyond “artist/title,” most drivers know what they want to see on their dashboards

Three in Four Own Cars With Dashboards That Display Artist and Title Information

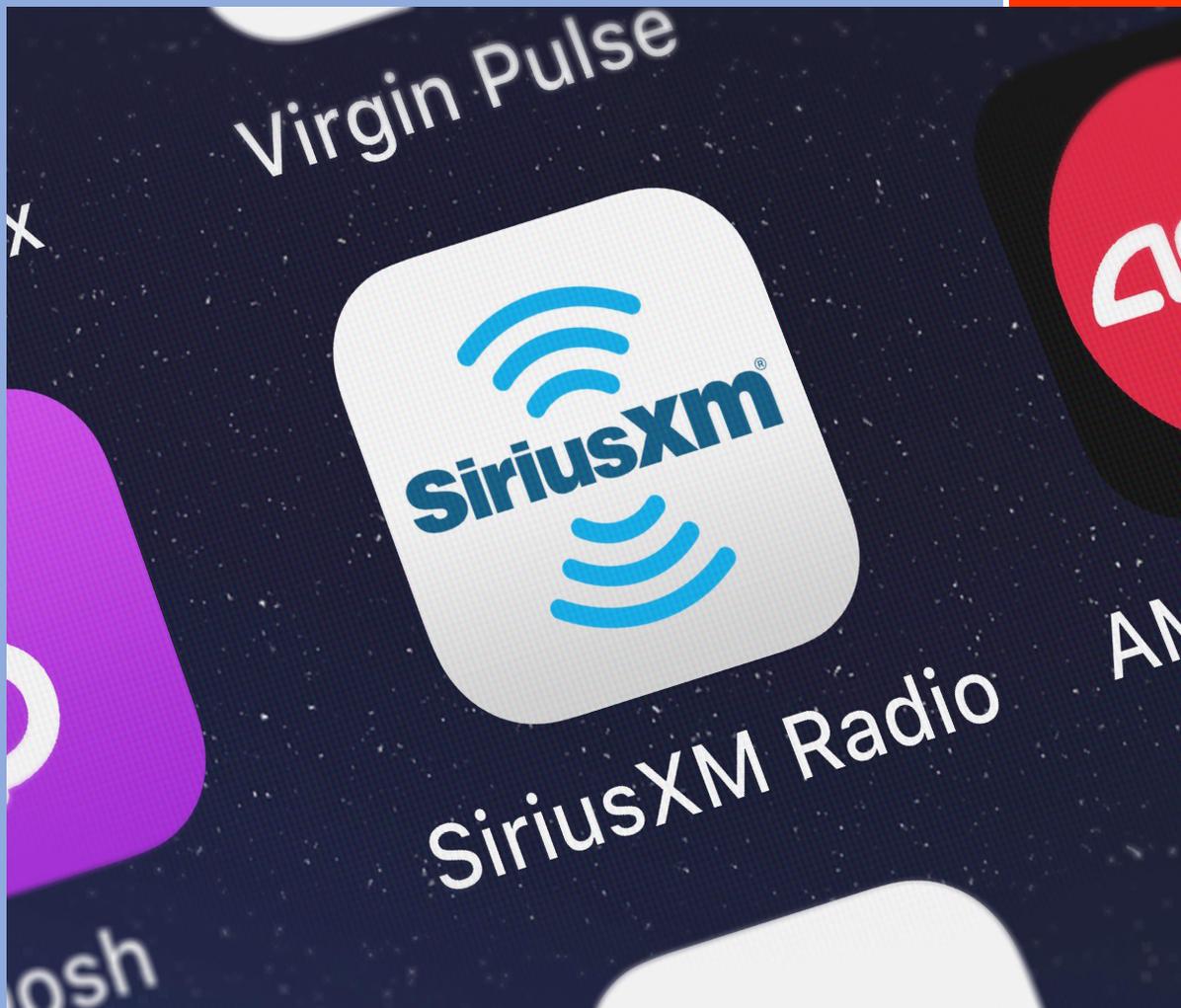
“Does your car’s dashboard have the ability to display artist and title information?”



Emergency Weather Information and Upcoming Artist/Song Are the Most Desirable Dashboard Display Features

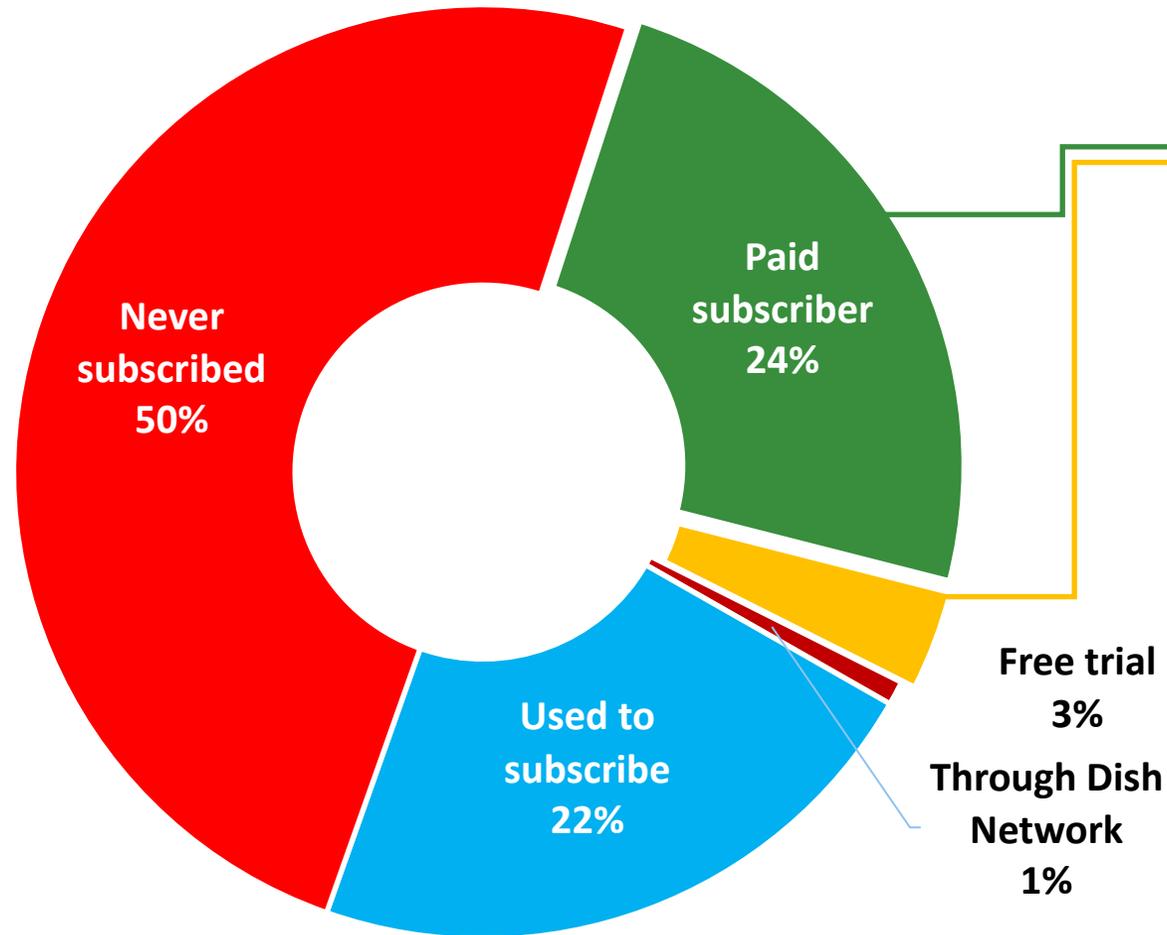


Among those with car radios having the ability to display artist/title info.,
% “very interested” in each car dashboard information element

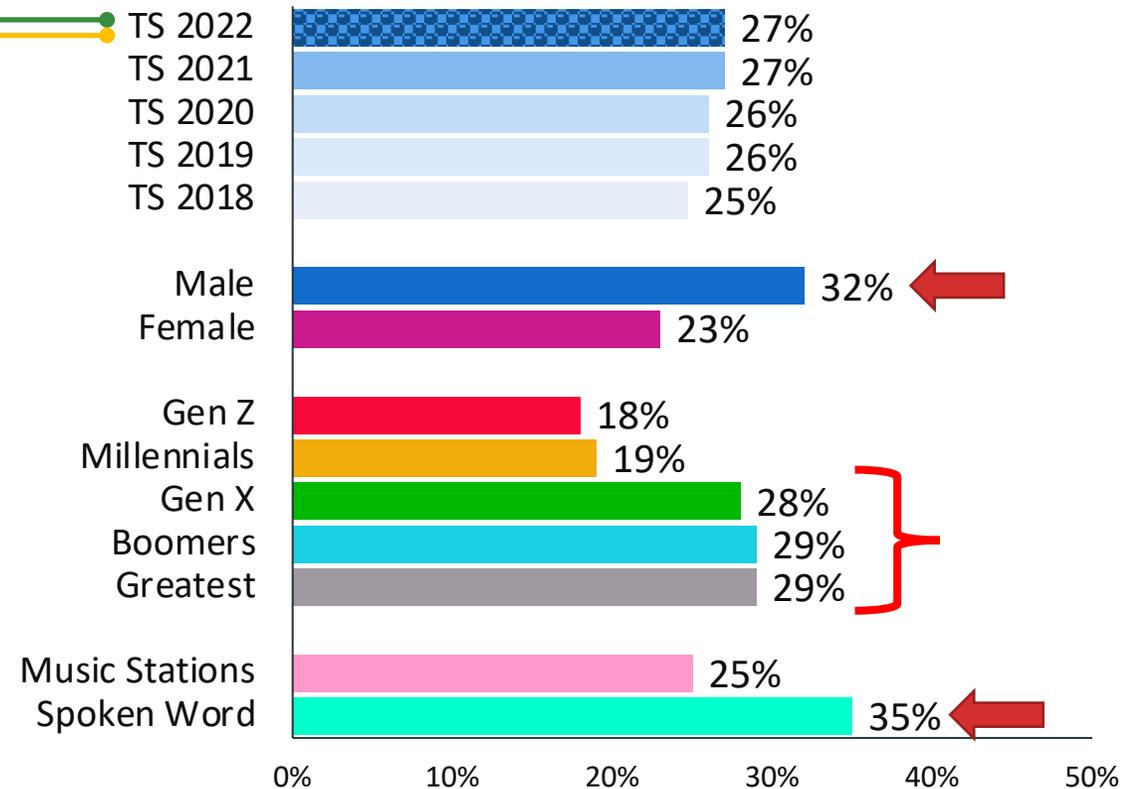


SiriusXM remains a prime threat to broadcast radio, widening its listening locations to home and work

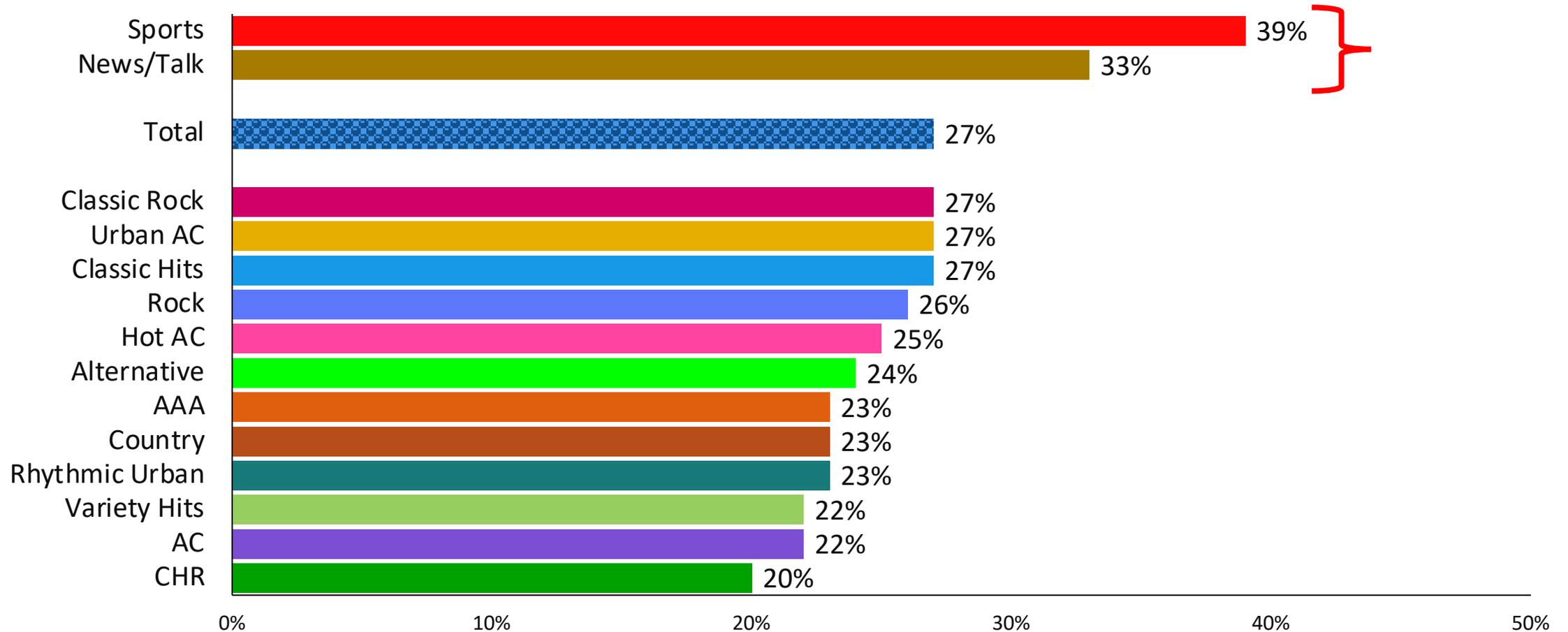
More Than One in Four Has a SiriusXM Subscription; Men, Older Consumers, and Spoken Word Fans Lead the Way



% Who Have a Paid/Trial Subscription to SiriusXM Satellite Radio

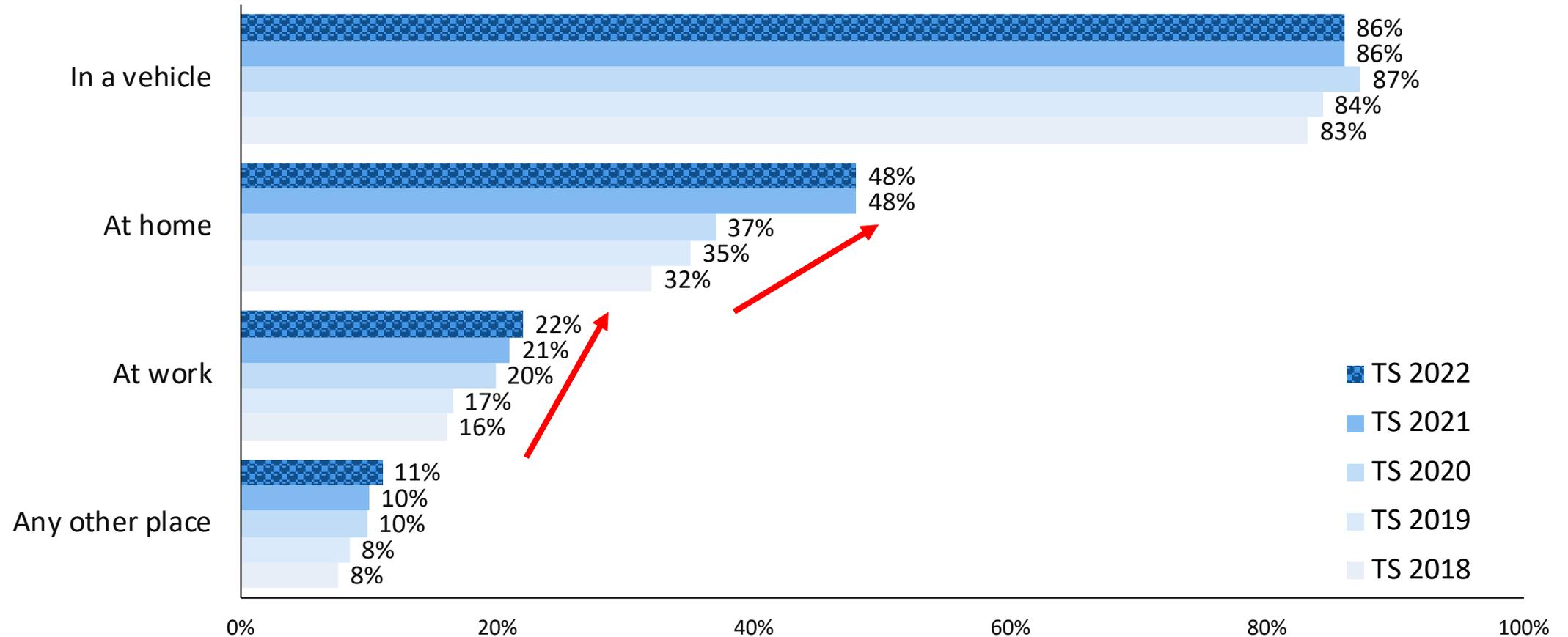


Sports and News/Talk Format Fans Are Most Likely To Have a Paid or Free/Trial Subscription to SiriusXM



% by format, who have a paid/trial subscription to SiriusXM satellite radio

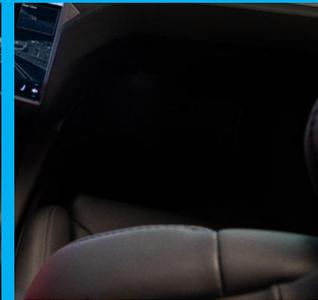
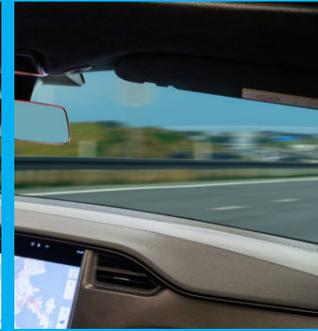
The Majority of SXM Subscribers Listen In Cars, But At-Home and At-Work Usage Are Becoming More Prevalent



% of SiriusXM satellite radio paid or free/trial subscribers who listen to the service in each location on an average weekday

Contact Us

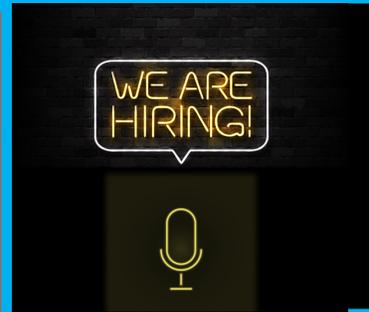
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media strategies

Executive Summary
TECHSURVEY
2022 JACOBS MEDIA



Radio: A Return To "Normal?"

