



Jacobs  
media strategies

Executive Summary

jacobs media  
techsurvey  
2023



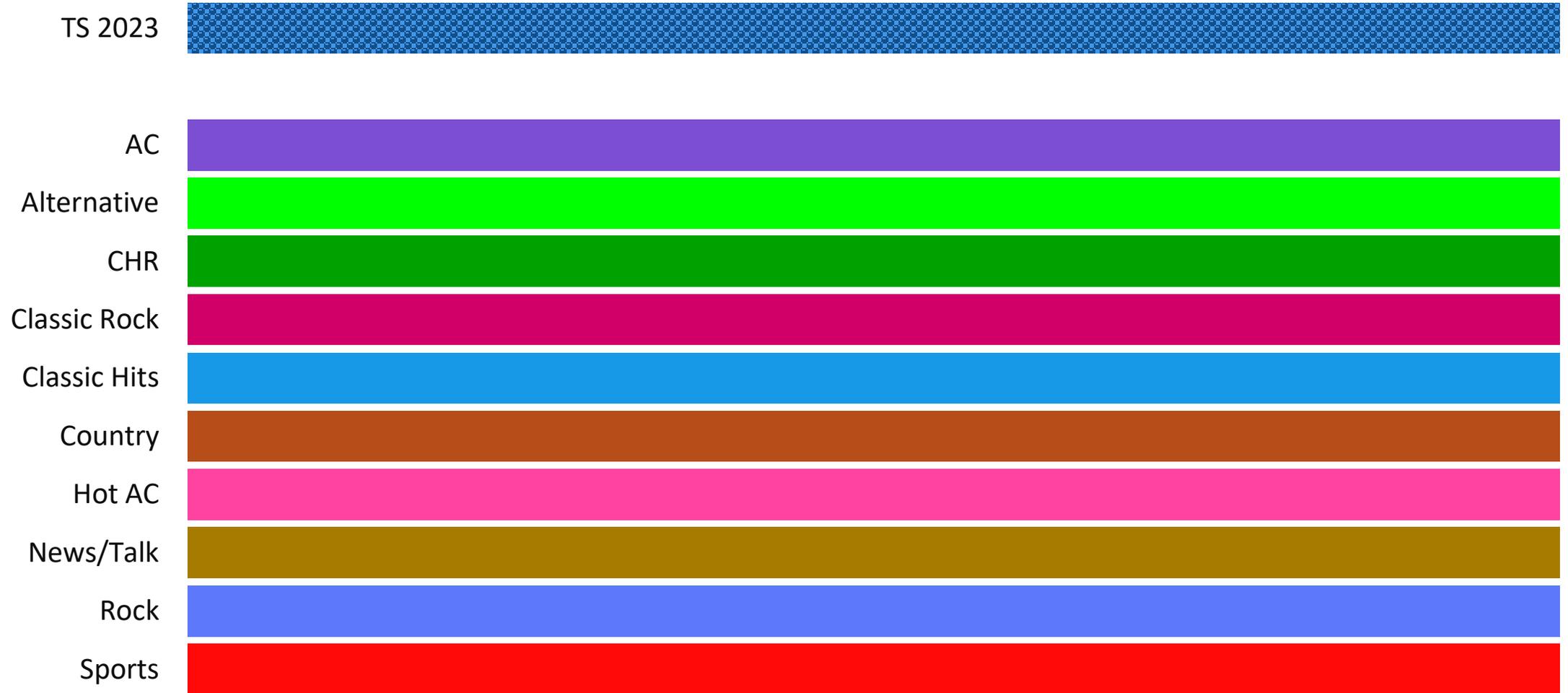
# Radio in the Post-Pandemic Era

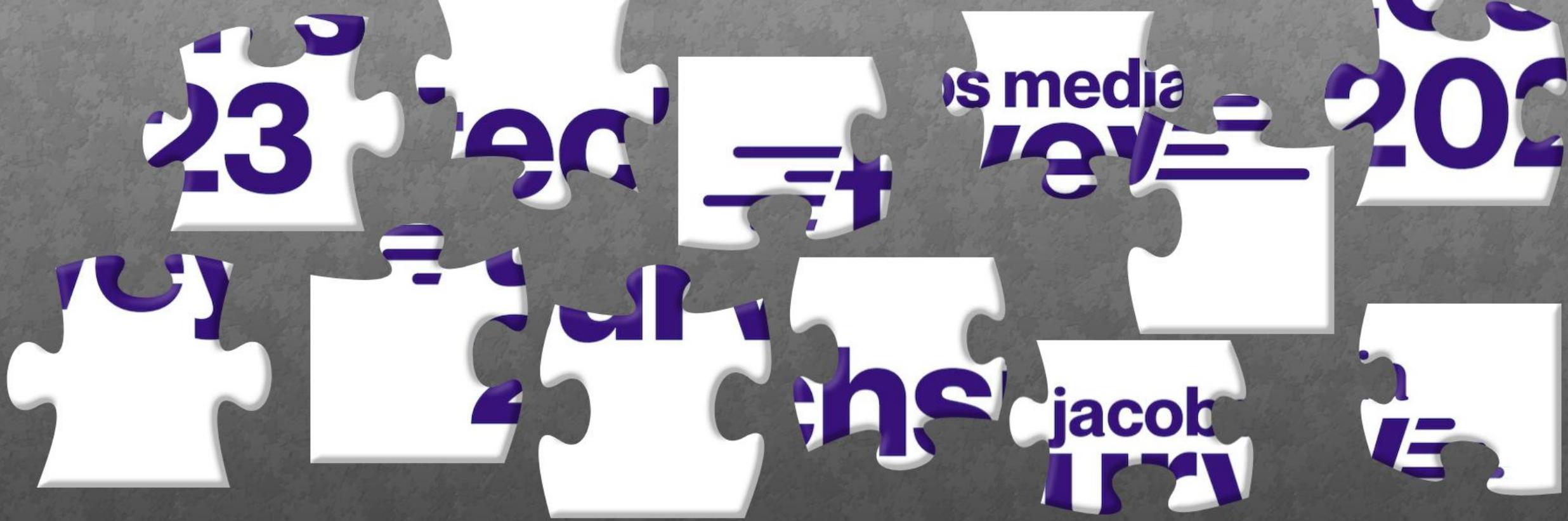


# Methodology

- 434 commercial radio stations in the U.S. & Canada
- N = 30,011
- Interview dates: January 4 - February 7, 2023
- 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 2022 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





# Key Takeaways

# Key Findings

- Media consumption patterns are returning to “normal.” Brand usage is generally higher, too. But still, WFH appears to be a permanent situation for at least one-third of respondents.
- Audio consumption is up – streaming audio & subscriptions, podcasts. But AM/FM radio listening continues to be “meh.” And as a source of new music discovery, radio’s influence is declining.
- A tale of two DSPs: Spotify continues to make gains at Pandora’s expense.
- Consumers have returned to driving and their lives have become more stable and predictable, while “connected cars” are becoming more widespread.
- The top reasons for radio listening erosion: less time in cars & lifestyle changes, but these are not as extreme as during the COVID years. Now, new media choices are looming larger.
- Broadcast radio’s “connectivity” and “local-ness” are the medium’s superpowers.
- Personalities continue to outrank music for station preference, but radio may be paying the price for RIFs, budget cuts, and terminations over the past few years.
- Regular radios at home continue to disappear. Conversely, the use of digital devices to listen to broadcast radio maintains its steady and historic rise. Mobile phones/apps and smart speakers are radio’s BFFs.
- While most pay for video and/or audio content, consumers are pushing back on subscription fees. Is there Interest in a paid commercial-free subscription model for broadcast radio stations? In a word, no.

# Key Findings

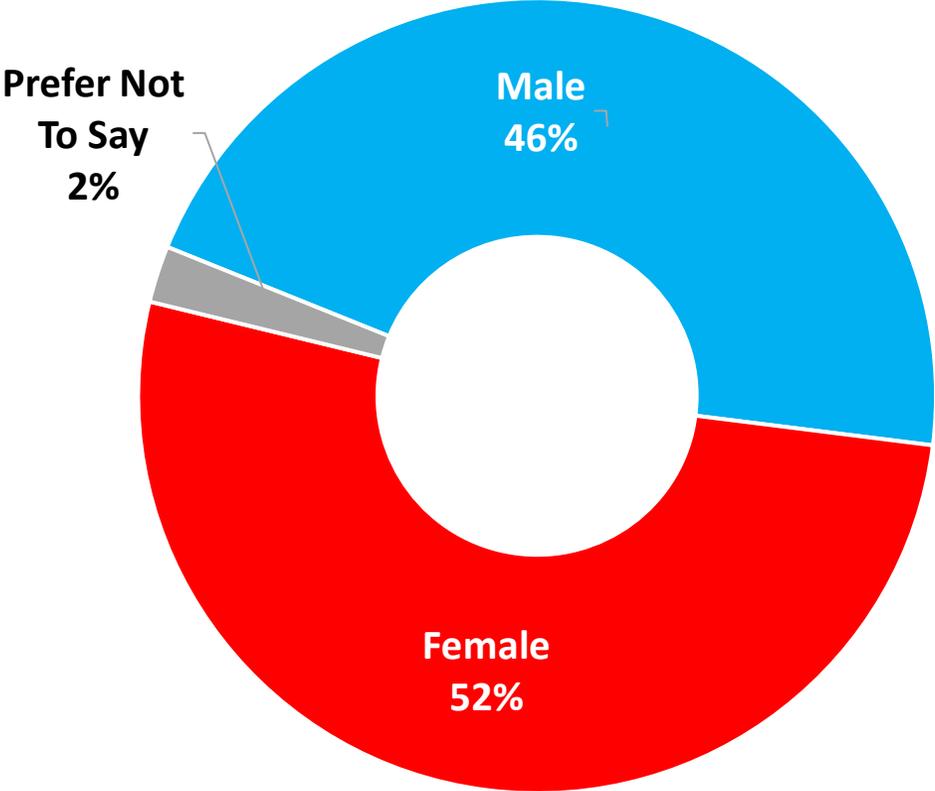
- Podcasting is up a tick, but the majority of this core radio sample listen infrequently or not at all.
- The overall percentage of AM/FM in-car radio listening is slipping, especially lower among Millennials and those who drive vehicles equipped with “connected systems.”
- Metadata matters – a dashboard feature broadcasters can control to craft a good look in the car.
- Bluetooth has passed FM radio as a “must have” new car feature; AM radio is well down the list.
- Satellite radio growth is modest, but it continues to come at broadcast radio’s expense.
- Smart speaker ownership ticks back up, and listening to broadcast radio is still a top “use case.”
- Mobile apps continue to be popular, heavily downloaded, and highly rated.
- Facebook is stable, while TikTok is showing growth in both “cume” and regularity of use. Many, however, are concerned about its Chinese ownership. Twitter is feeling some turbulence since Musk bought the company.
- QR codes are “a thing,” a potential for radio programmers, sellers, and marketers to economically promote their stations.
- The metaverse is *not* “a thing” – at least, not yet.



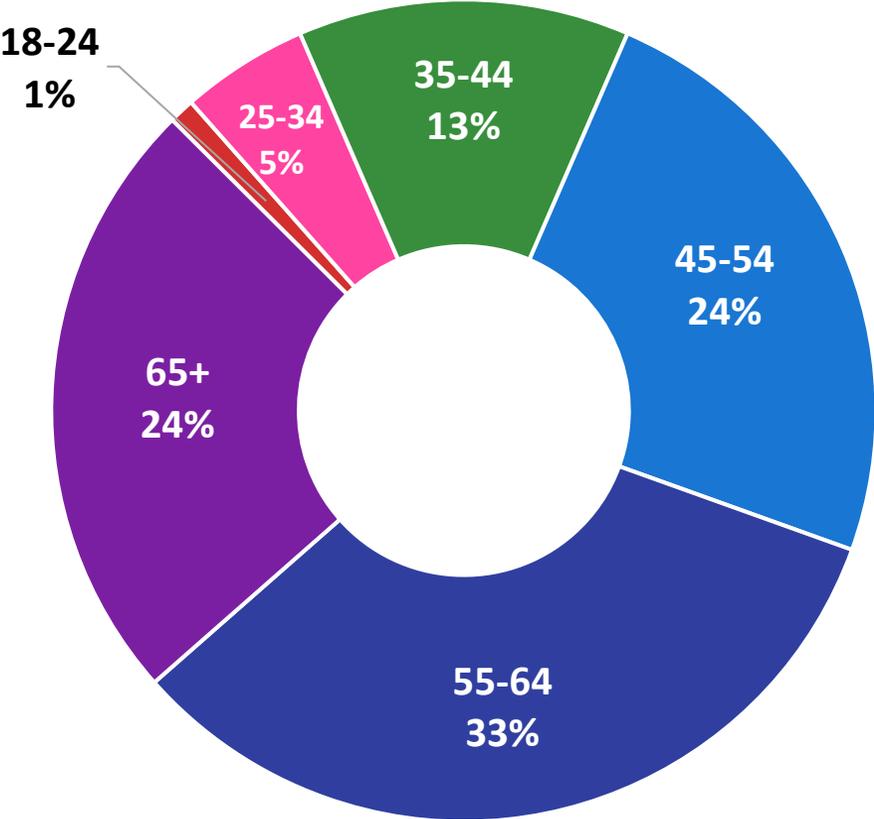
# The Sample

# Demographics

## Gender

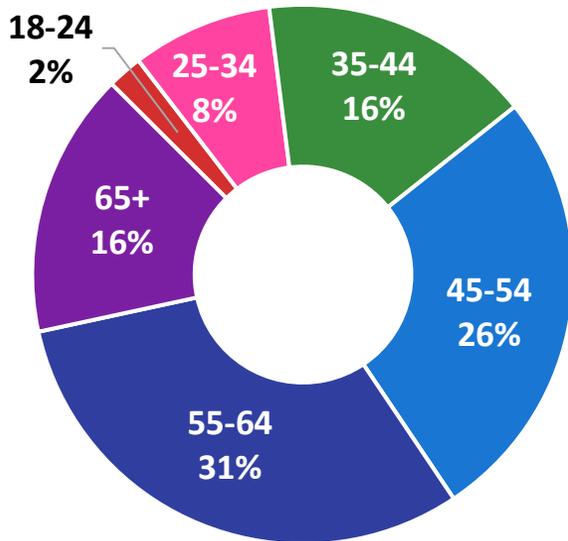


## Age

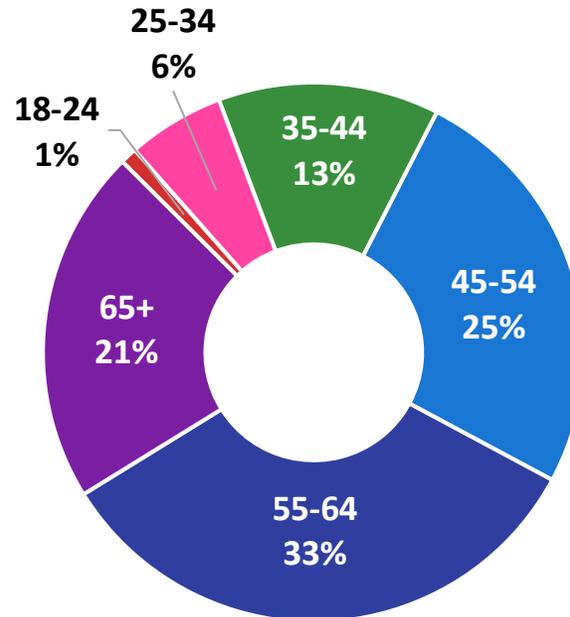


# Like Radio, the Techsurvey Sample Skews Older

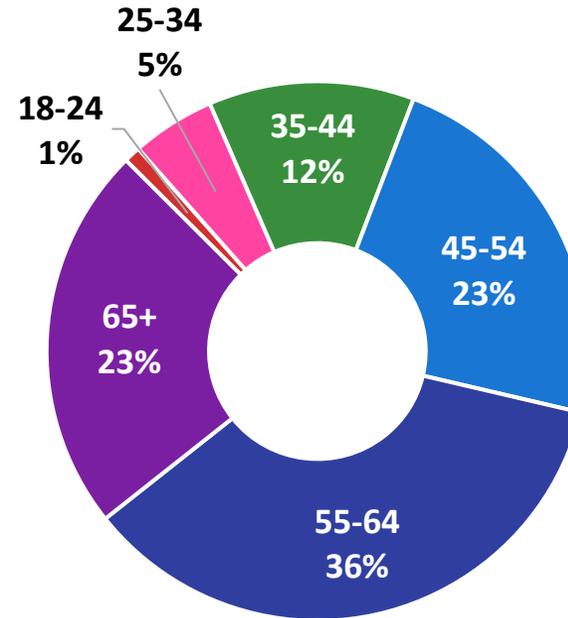
TS 2020



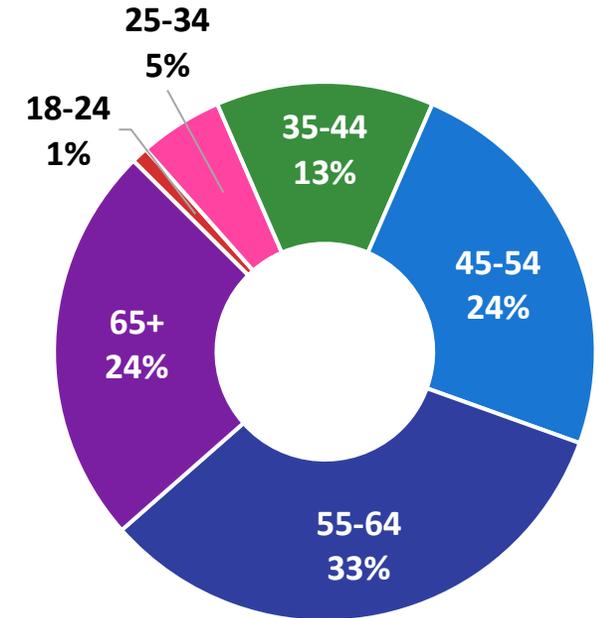
TS 2021



TS 2022



TS 2023



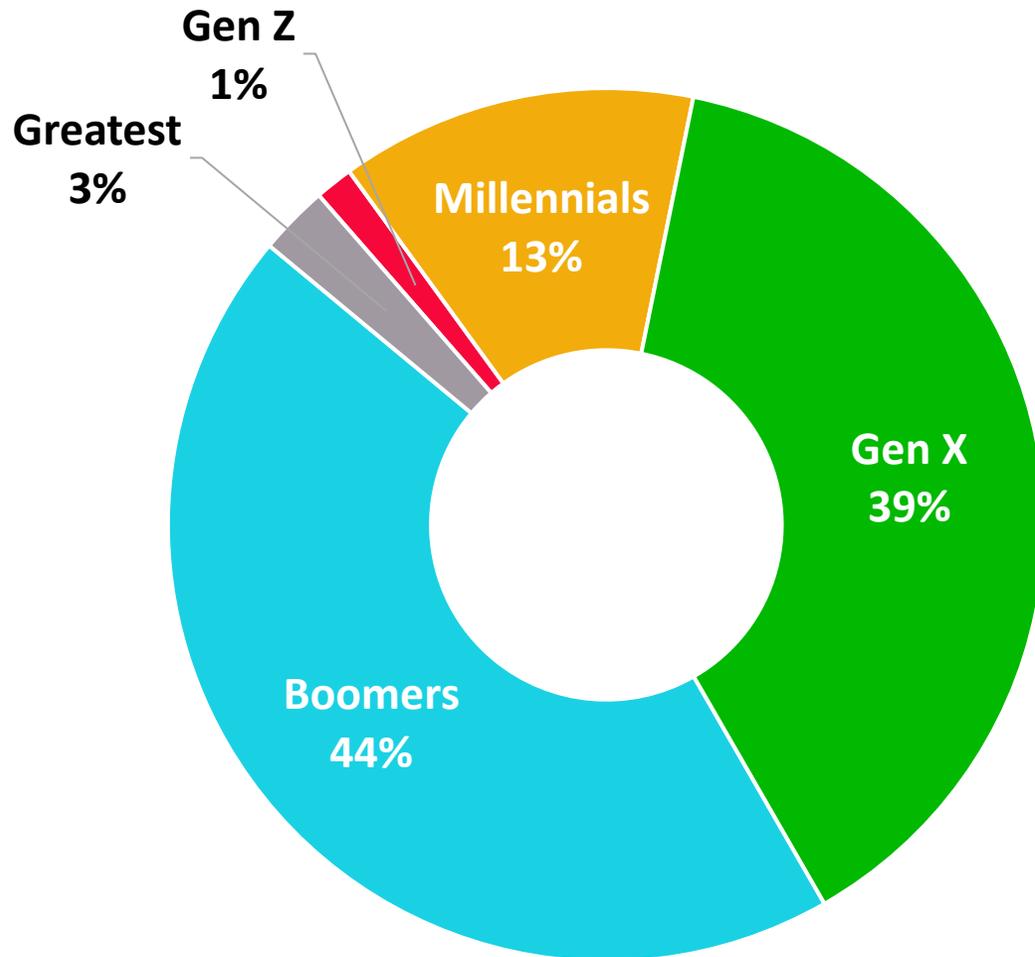
Average age: 52.2

Average age: 54.8

Average age: 55.8

Average age: 55.5

# Generations

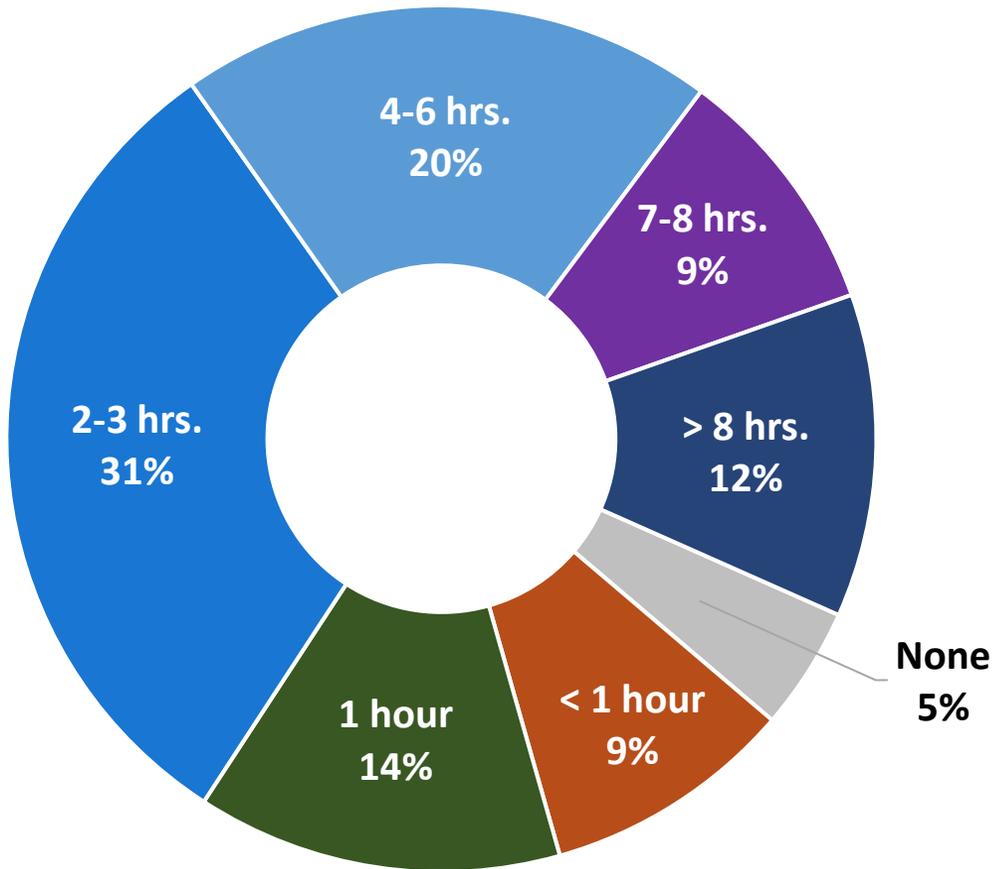


- Gen Z (born after 1996)**
- Millennials (born between 1981-1996)**
- Gen X (born between 1965-1980)**
- Baby Boomer (born between 1946-64)**
- Greatest Generation (born before 1946)**

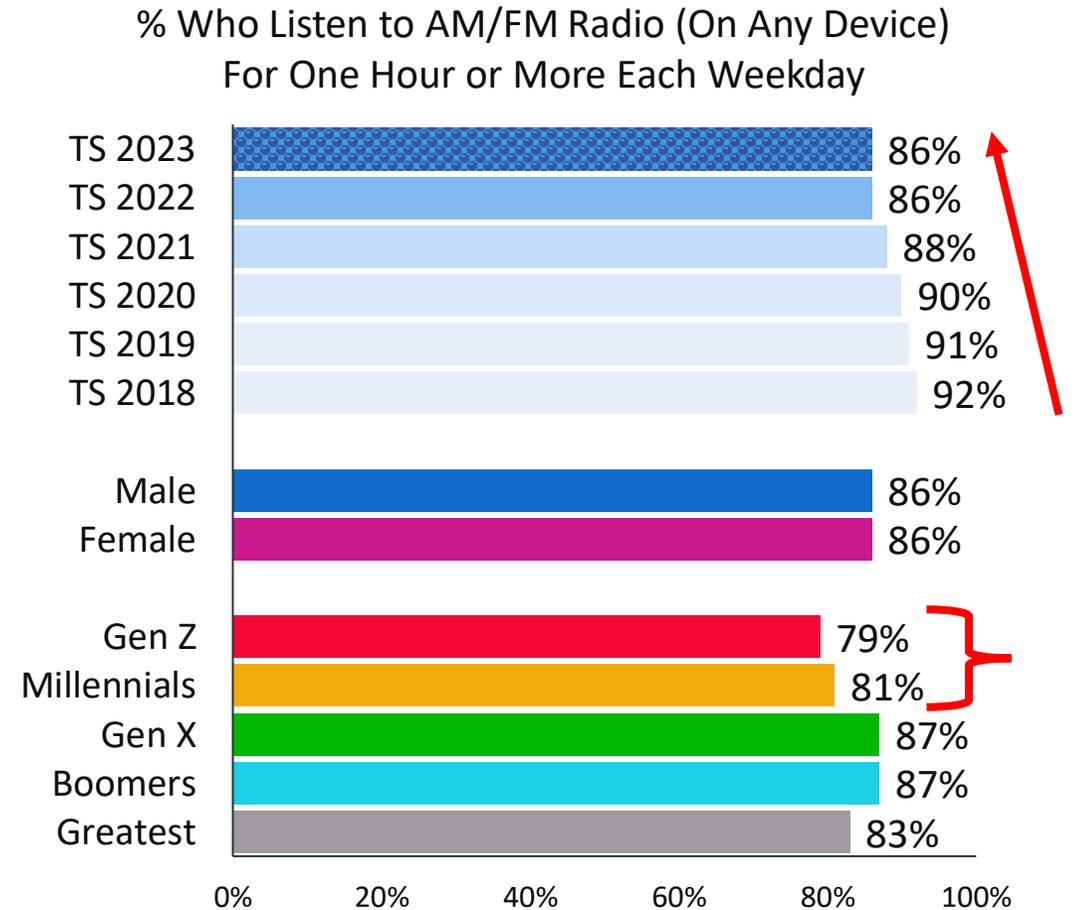


**Radio listening levels even among core fans is meh. The audience is aging, and younger people are least involved with radio.**

# AM/FM Listening Is Flat At Its All-Time Low, Even Weaker Among the Youngest Generations



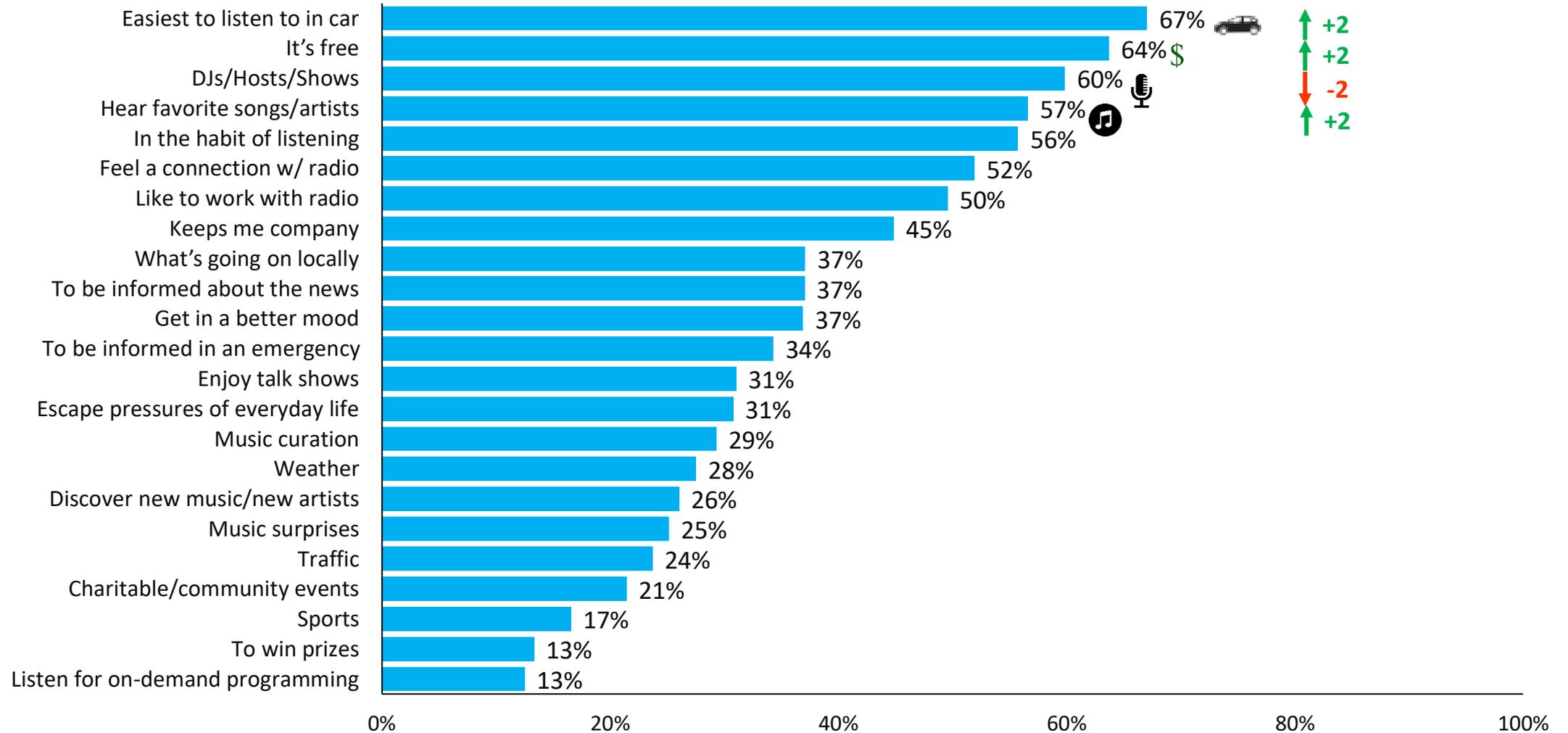
*“How many hours on an average WEEKDAY (Monday-Friday) do you use/listen to any local AM/FM radio stations (using a regular radio OR audio stream on any device)?”*





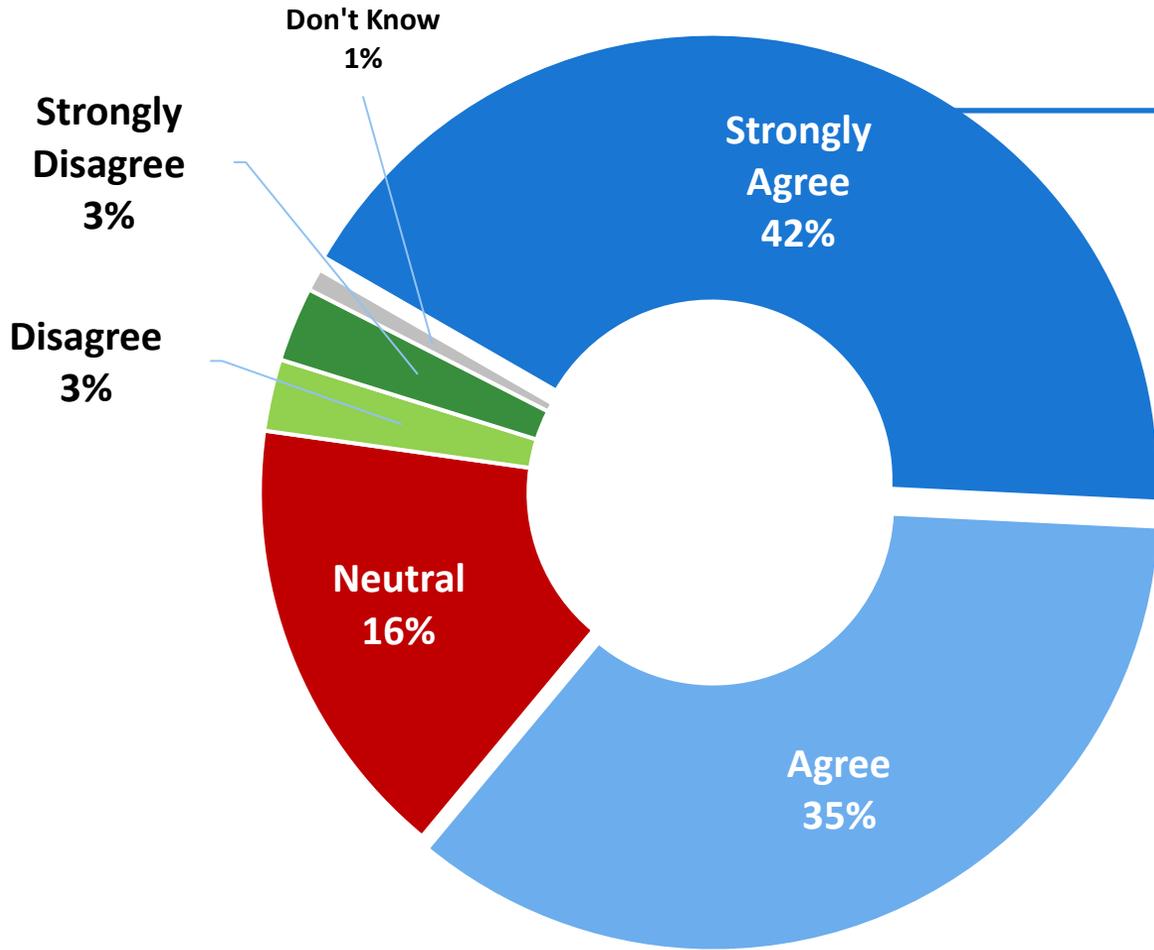
**Radio's appeal continues to revolve around ease of use, personality, music, and "emotional benefits."**

# Why AM/FM Radio?

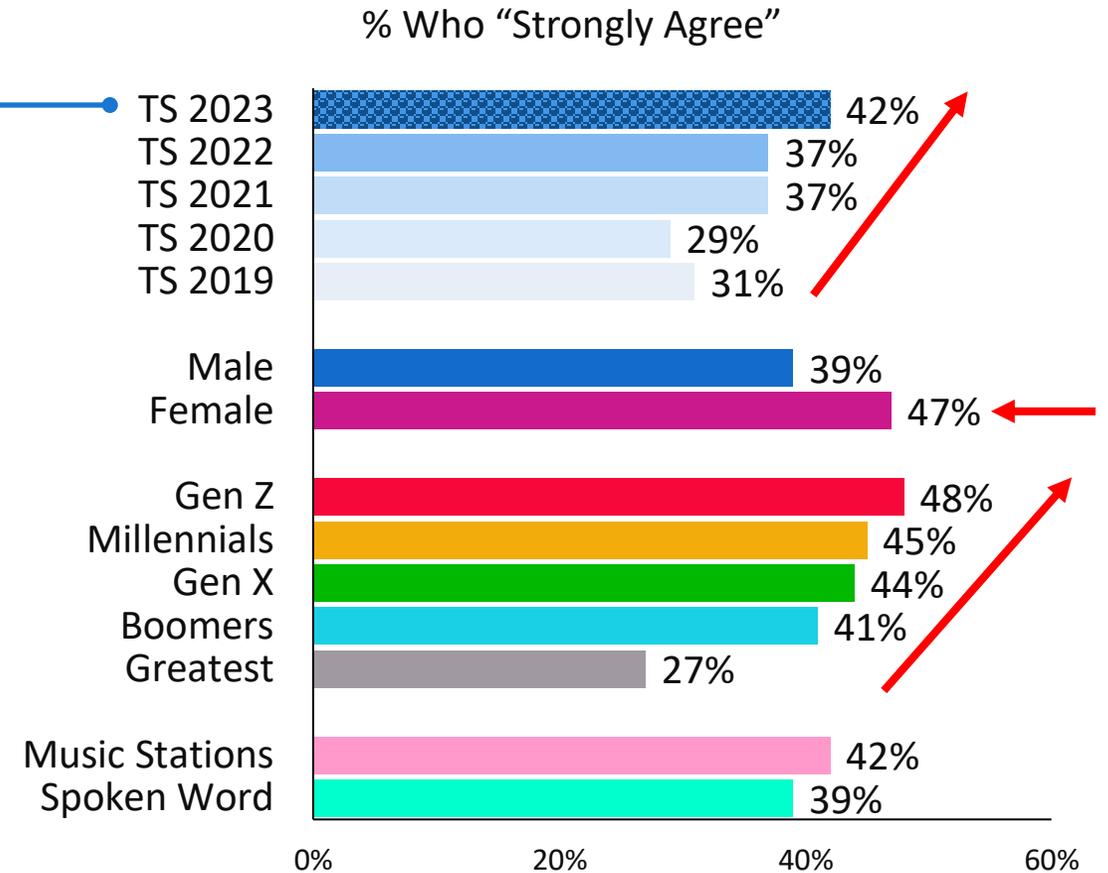


Among those who listen to AM/FM radio, % who say this is a main reason they listen

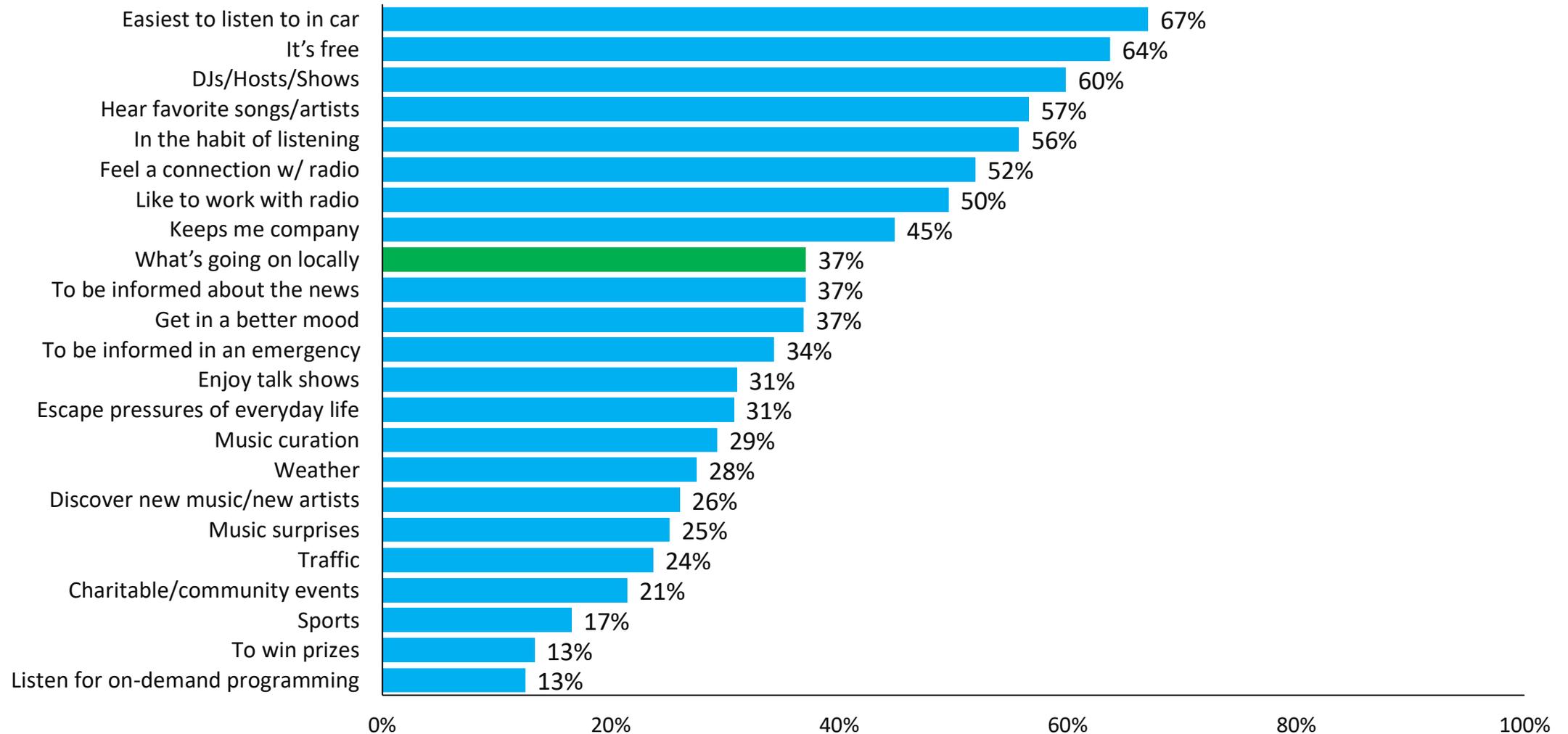
# Since COVID, More Core Radio Listeners Feel a Sense of Connection to Their P1 Station, Especially Younger Radio Fans



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

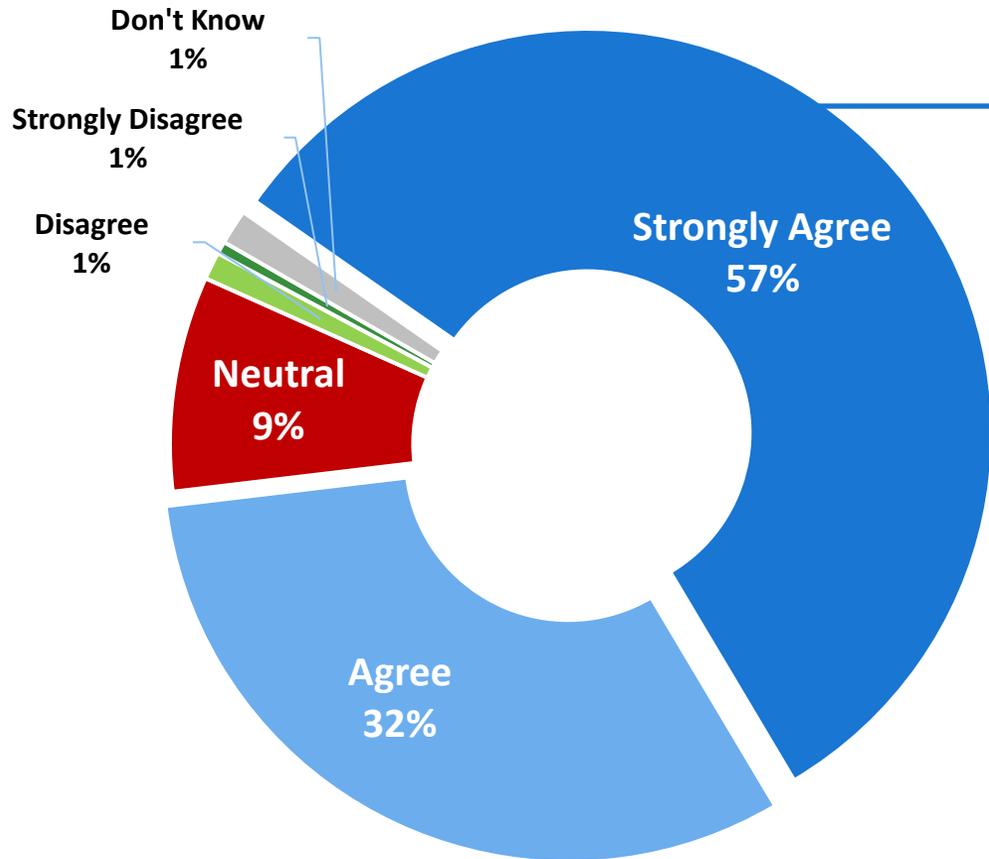


# Nearly Four in Ten Say a Main Reason They Listen to AM/FM Radio Is to Hear About What's Going on Locally

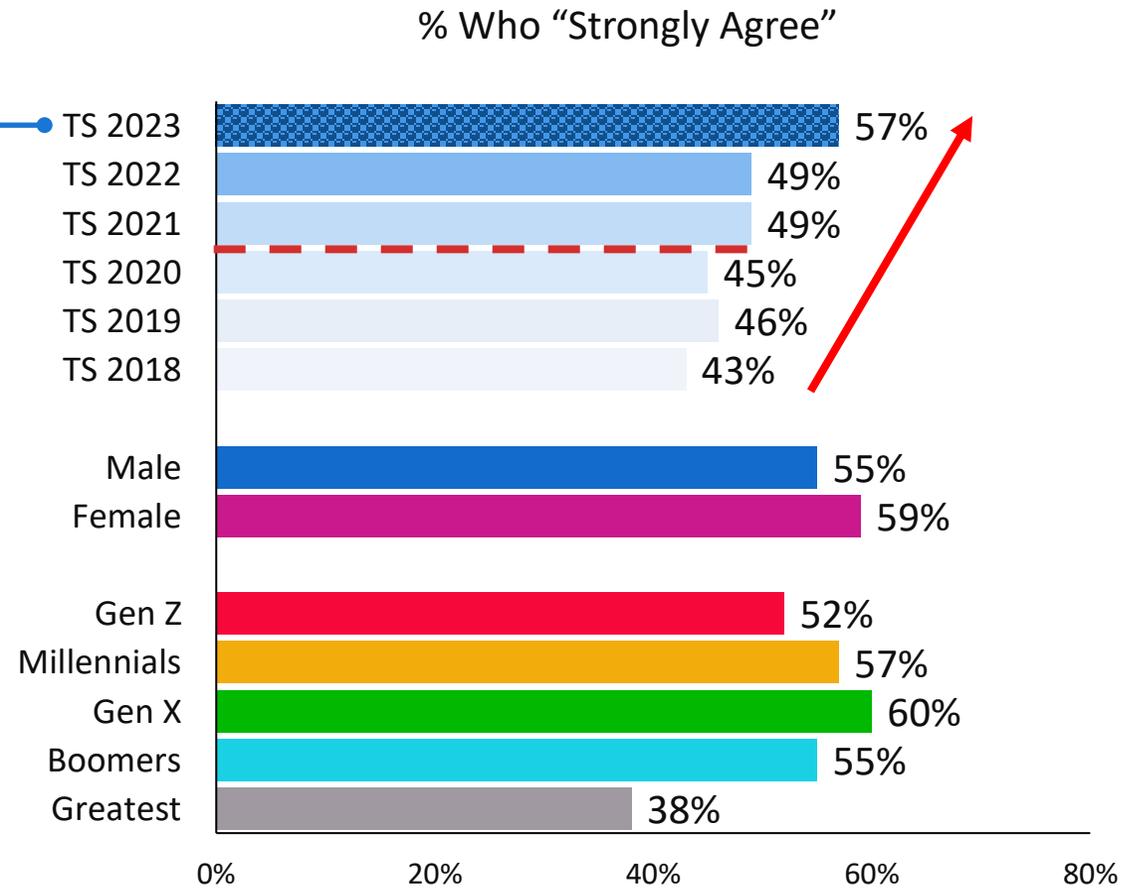


Among those who listen to AM/FM radio, % who say this is a main reason they listen

# Radio's Local Edge Continues Trending Up, Reaching An All-New High in 2023



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

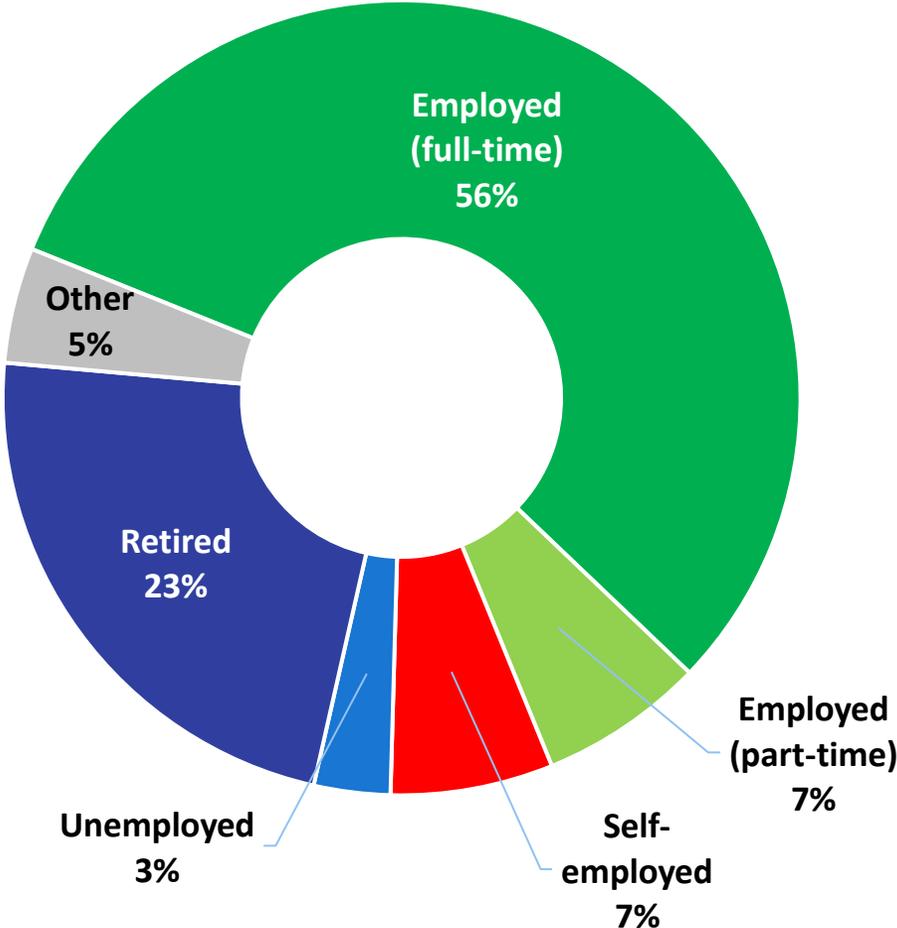




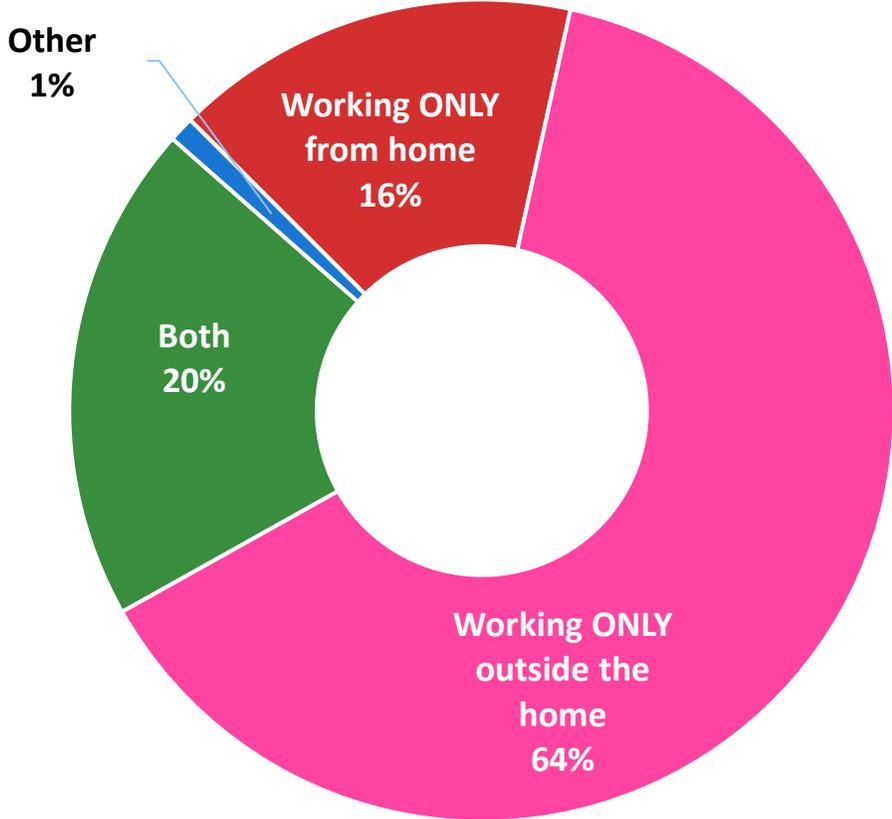
**Work-From-Home remains popular as COVID fades. More than one-third of those employed spend all or some time away from the workplace.**

# Unemployment Is Low and More Than One in Three Works Full or Part-Time Out of Their Homes

### Employment Status



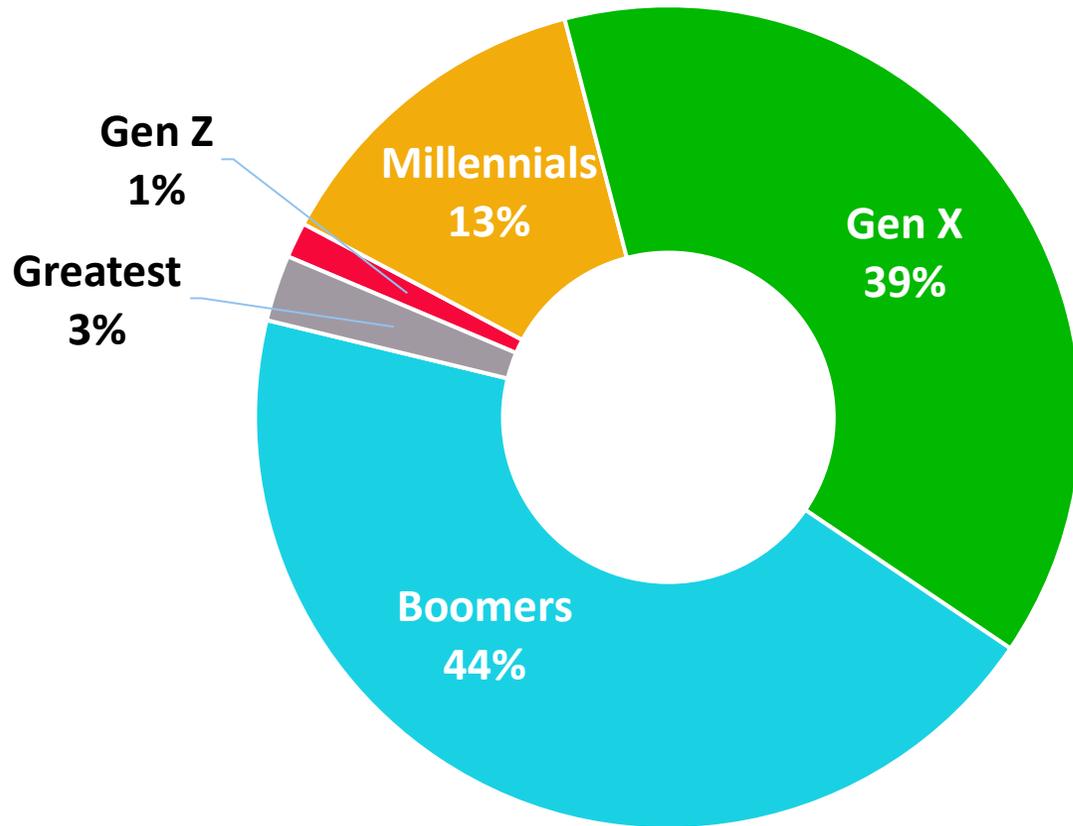
### Work From Home / Outside the Home



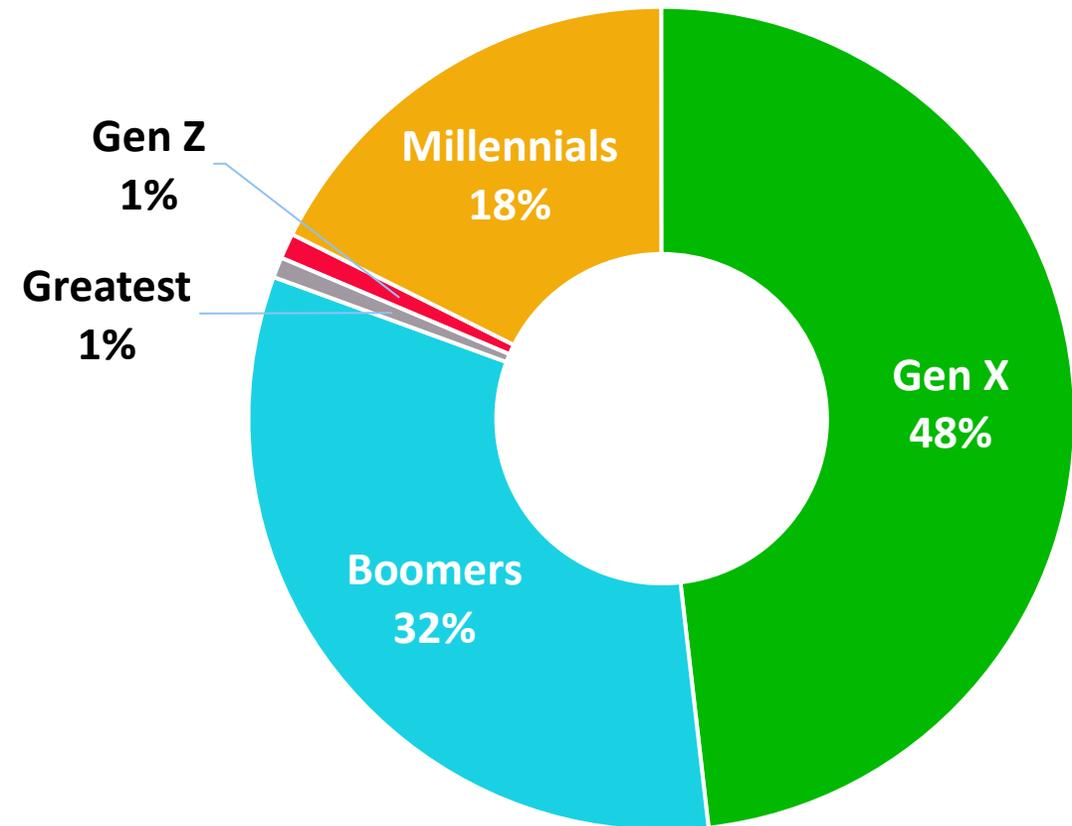
Among those employed full-time/  
part-time/self-employed

# Work-From-Homers Tend to Be Younger

Total

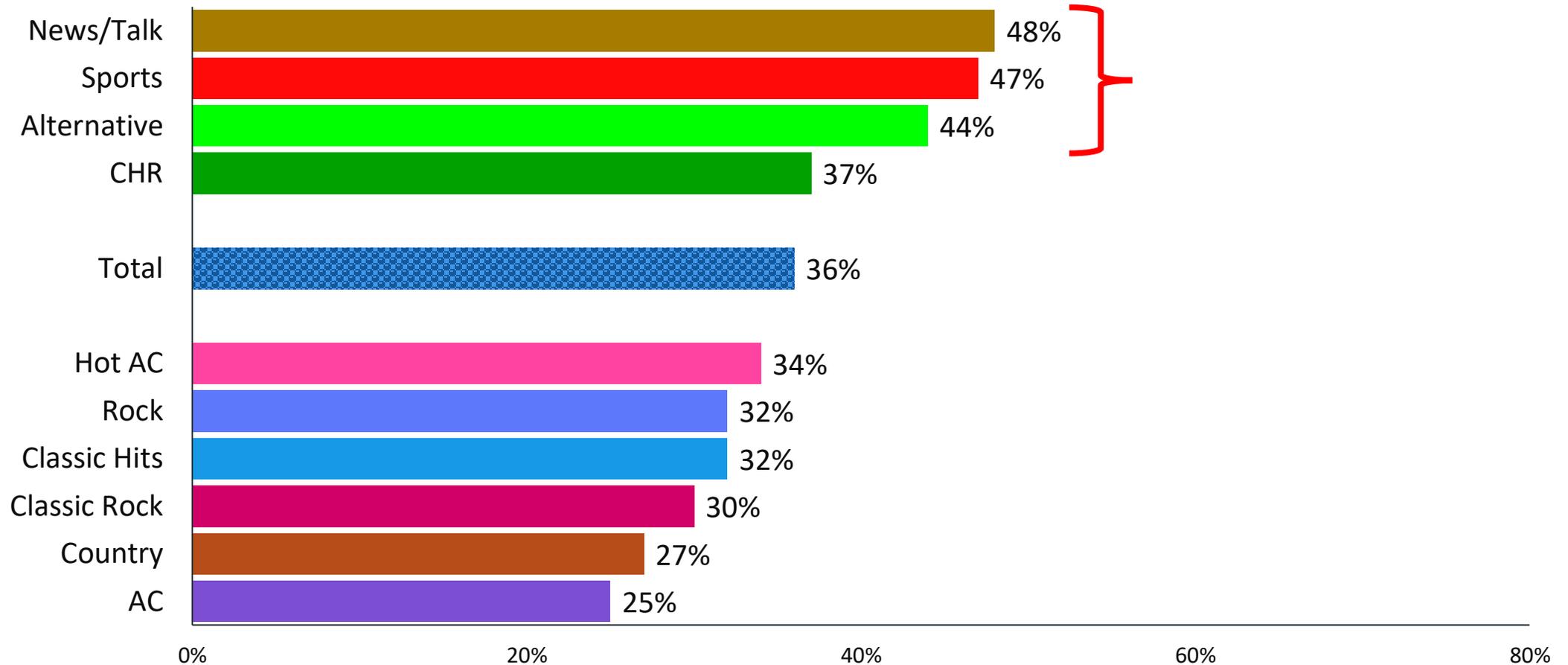


Working From Home  
All or Some of the Time



Among those employed full-time/  
part-time/self-employed

# News/Talk, Sports and Alternative Fans Are Most Likely to Be Working From Home at Least Part of the Time

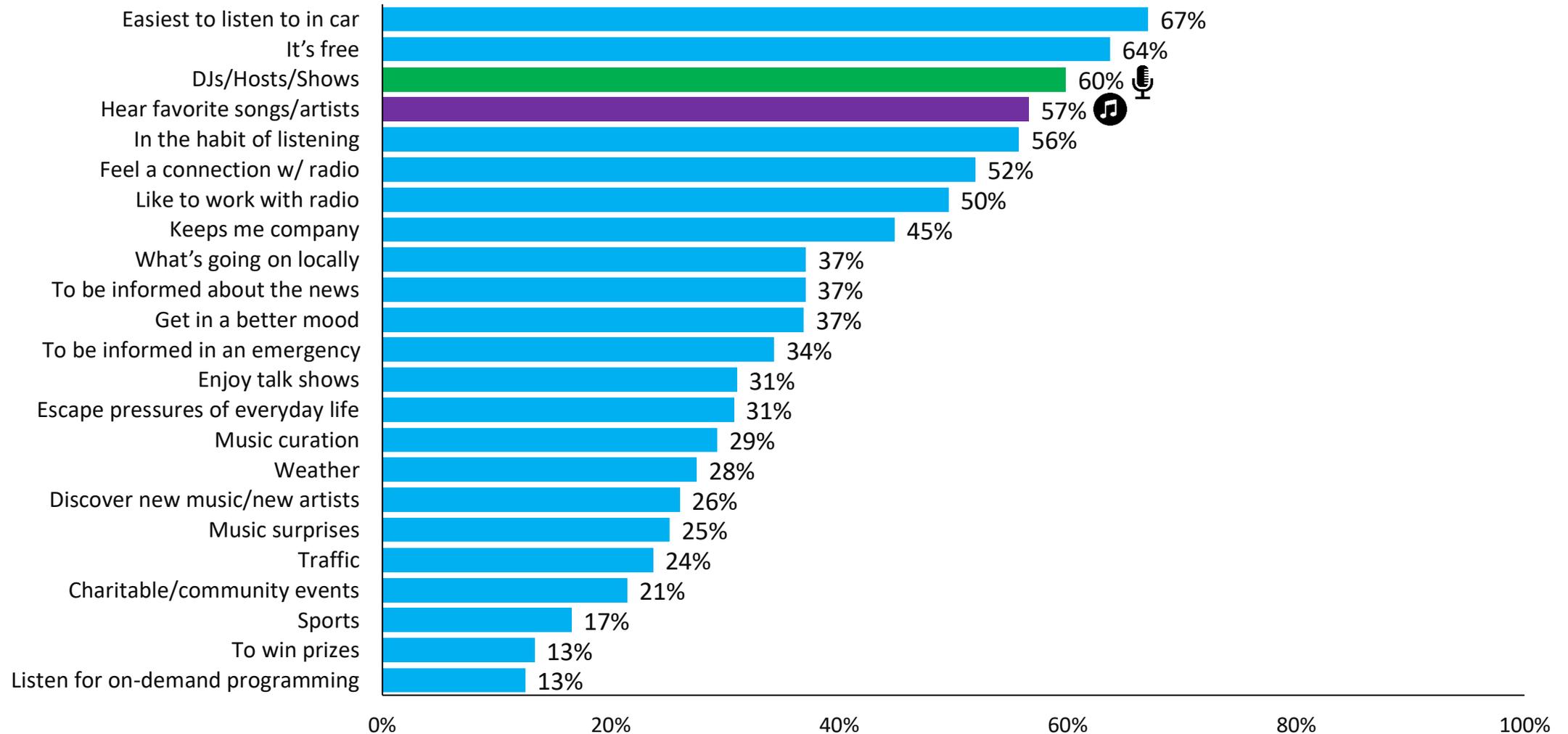


Among those employed full-time/part-time/self-employed, % by format working only from home or both from home and outside the home



Over the past five surveys, broadcast radio personalities have stayed ahead of music as key attributes that contribute to listening.

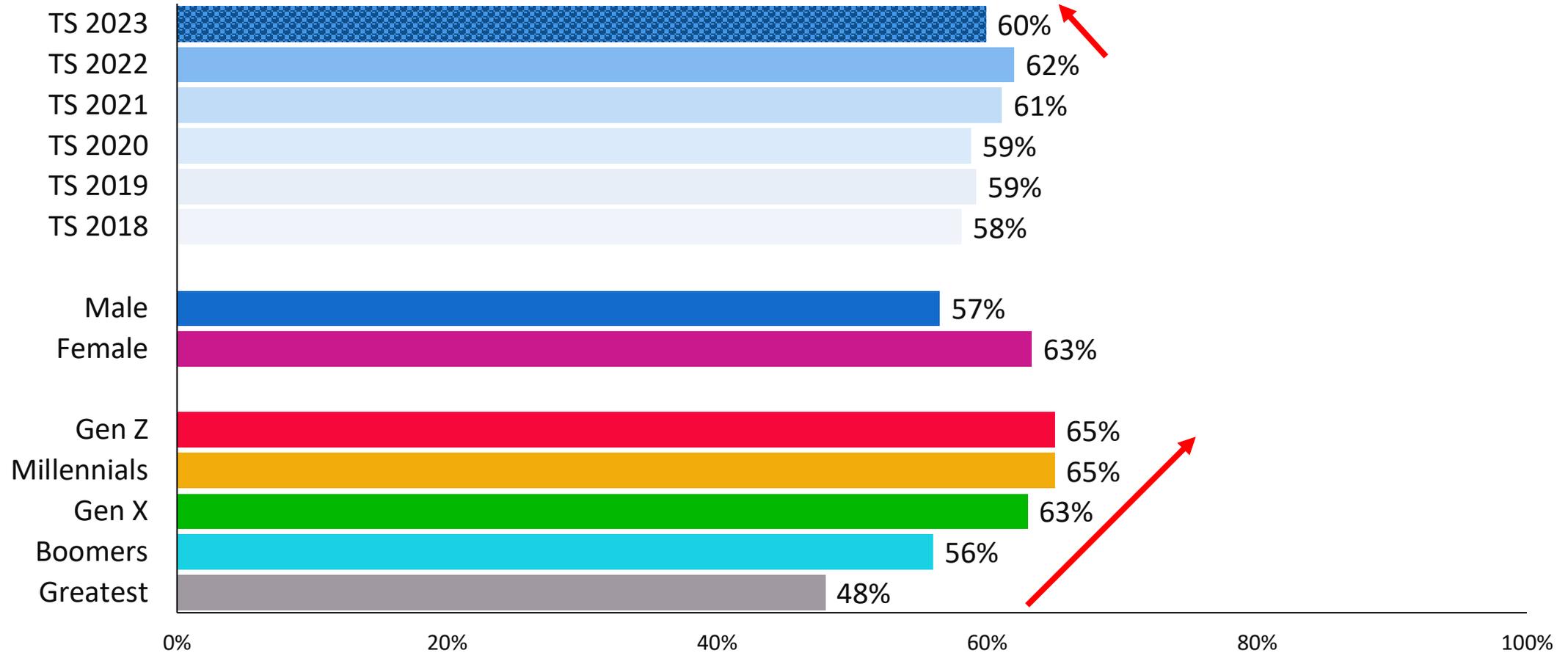
# Personalities Still Outpace Music in Appeal, But It's Close



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

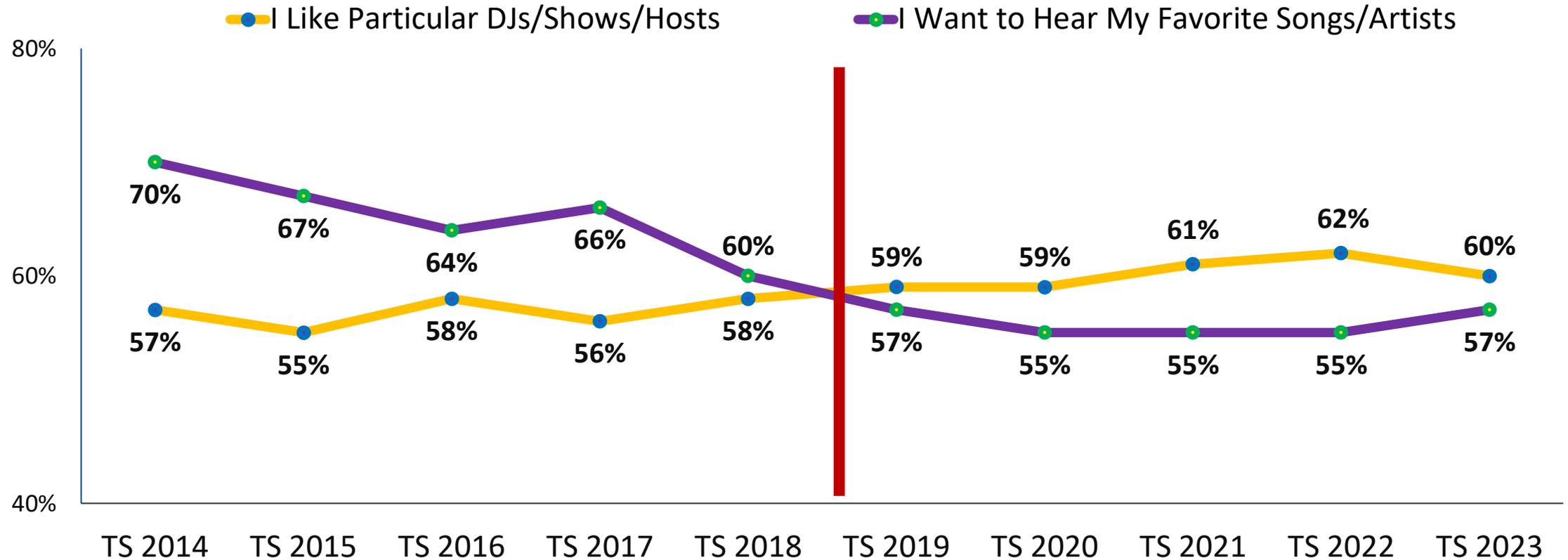
# Personality Appeal Takes a Step Back, Is Strongest Among Women and Younger Generations

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



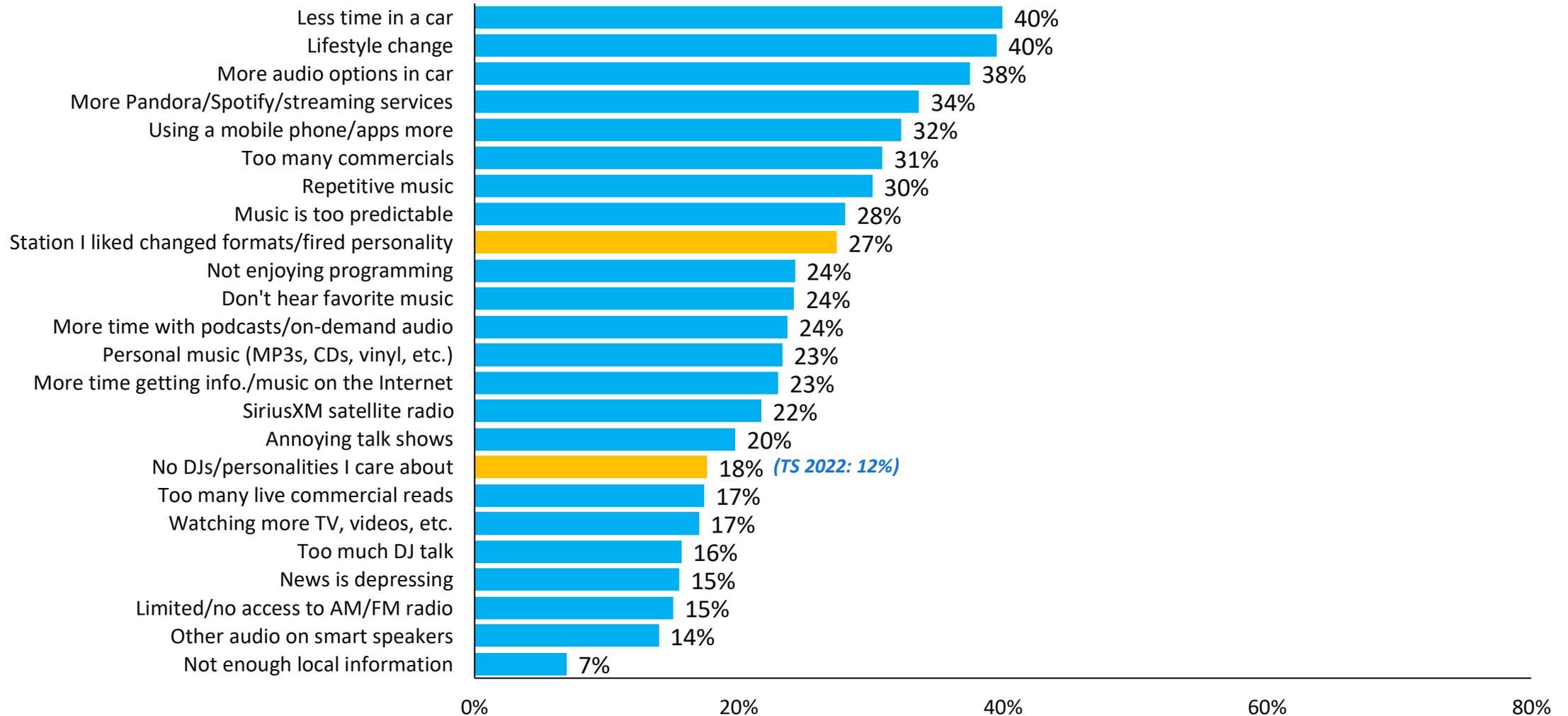
Among those who listen to AM/FM radio,  
% who say this is a main reason they listen

# Personalities Continue to Outpace Music, But the Gap Has Narrowed



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

# Why Do Personalities Lose Ground? A Theory.

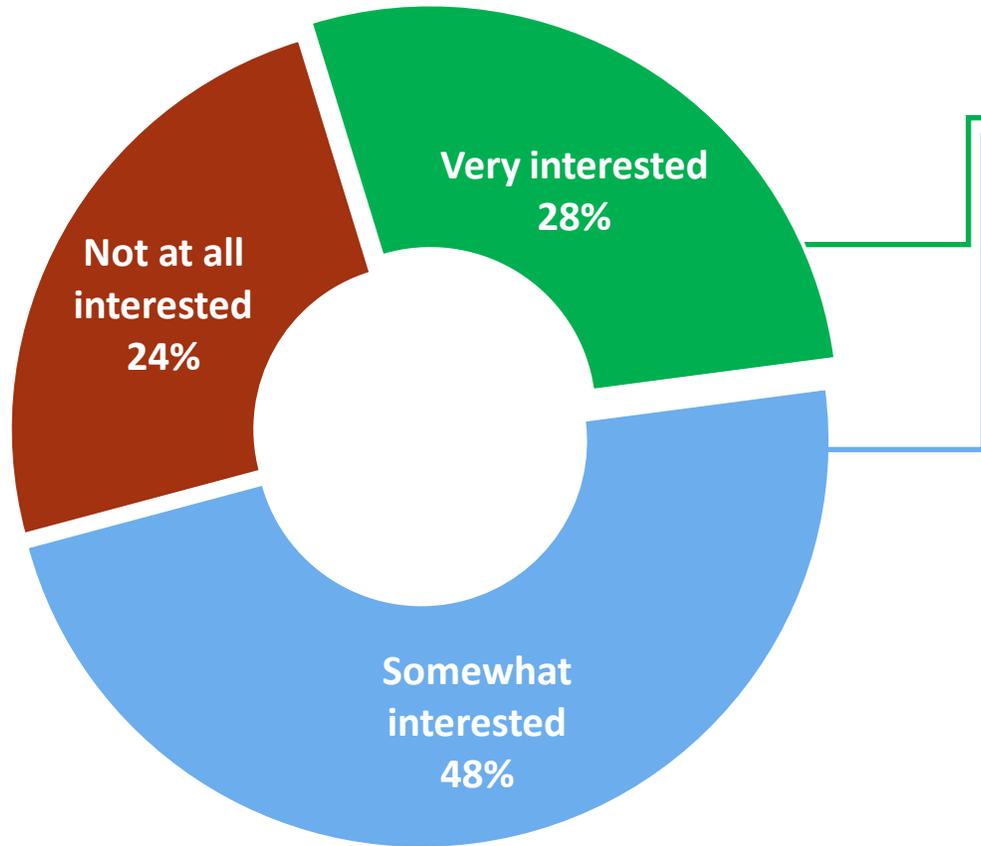


Among those who say they are listening less to AM/FM radio in the past year, % who say this is a main reason they listen less



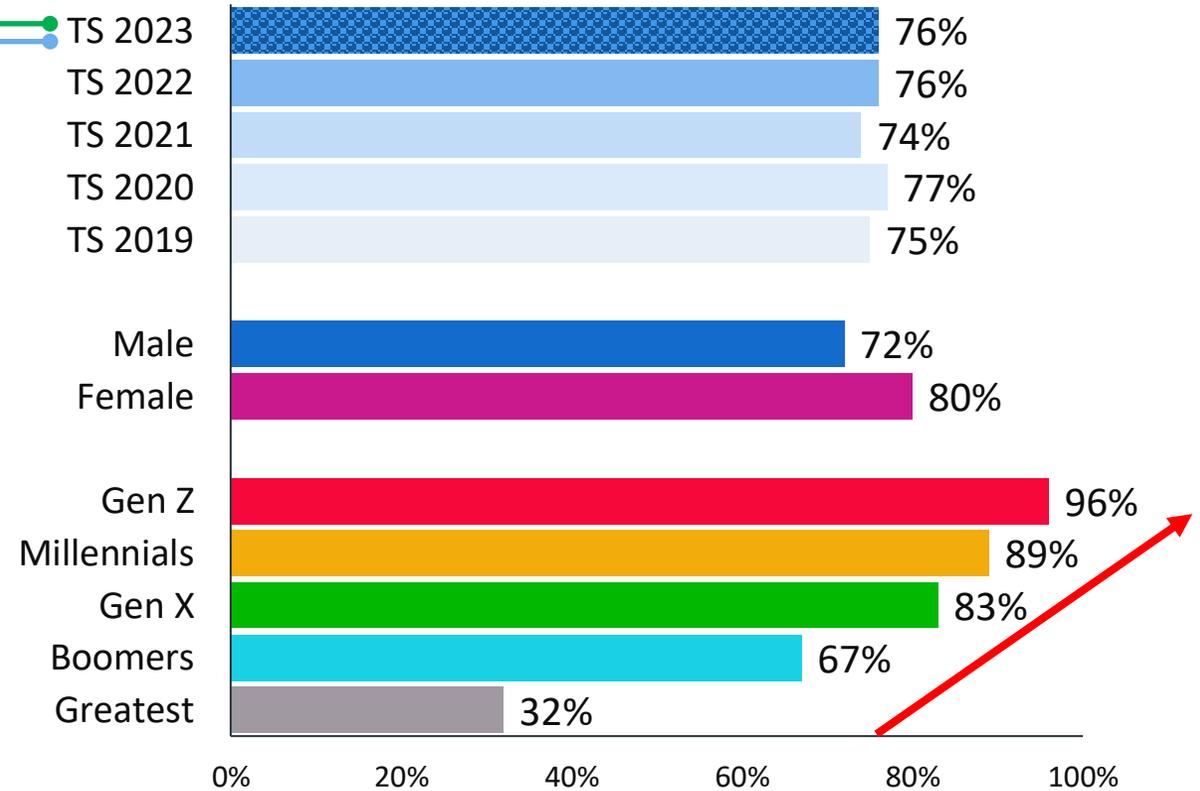
**Radio's role as a  
music/artist  
discovery  
medium  
continues to  
diminish.**

# About Three in Four Have Interest in New Music/Artists



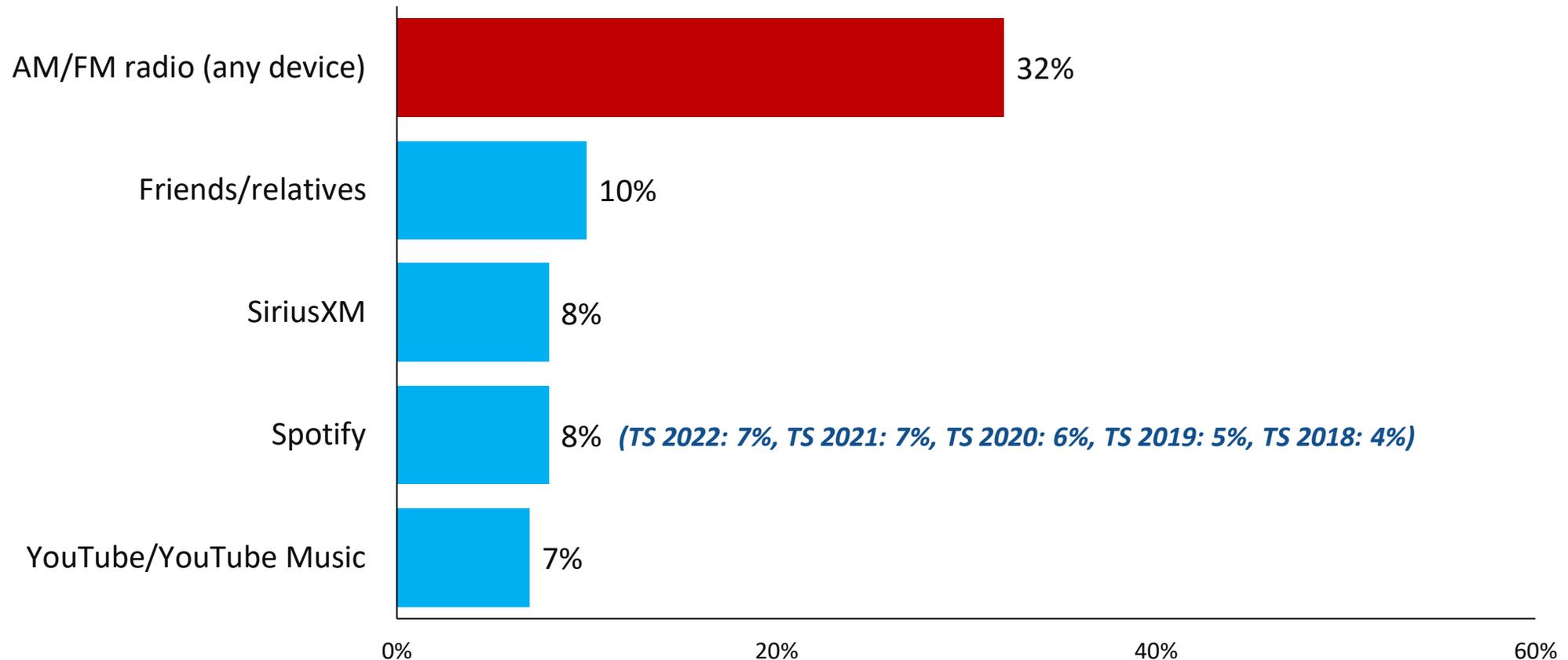
*“How interested are you in discovering new music and new artists?”*

% “Very Interested” or “Somewhat Interested” in New Music/New Artists



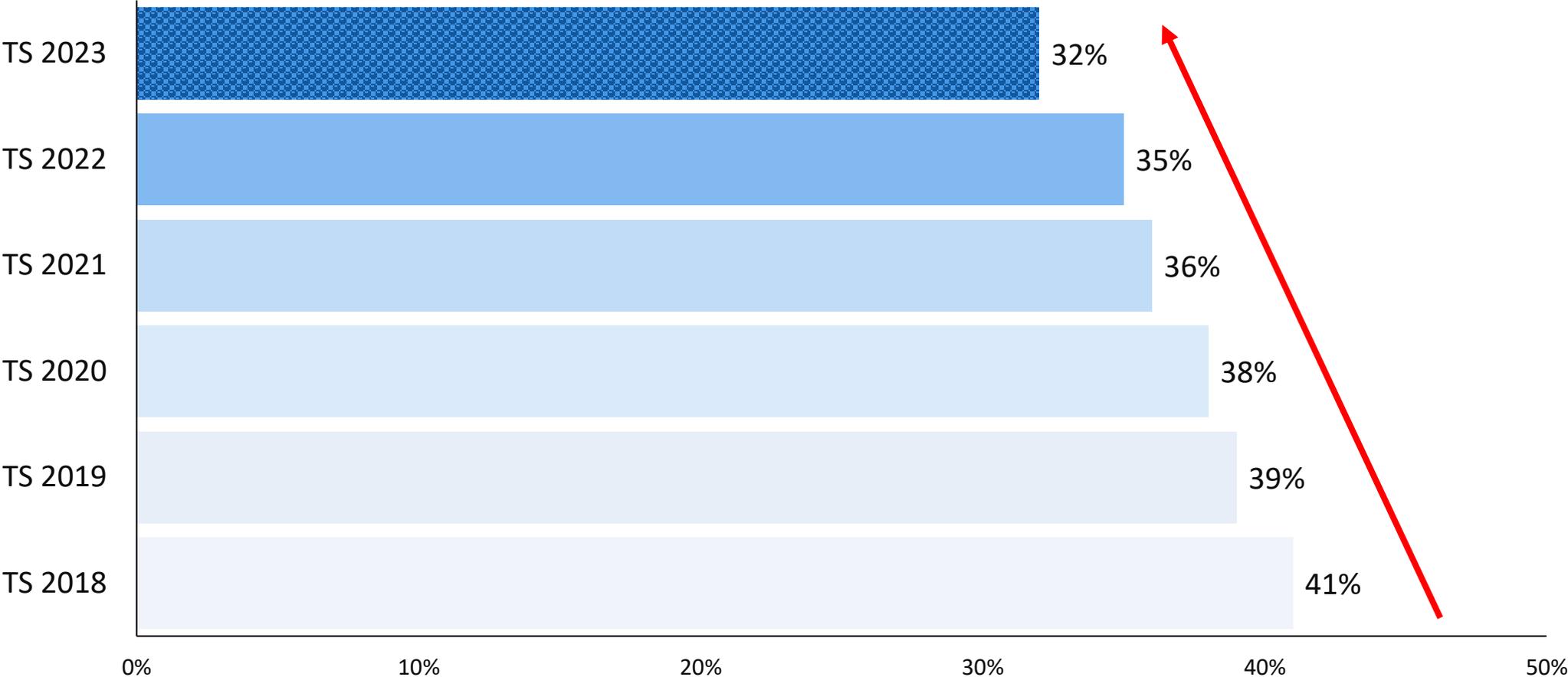
# As a Single Primary Source For New Music/New Artist Discovery, AM/FM Radio Dominates...

*“What is your primary source for finding out about new music & new artists?”*



Among the 76% who are very or somewhat interested in new music/new artists (sources 5% or higher shown)

# ...But the Strength of AM/FM Radio as the Primary Source For New Music Discovery Is Fading



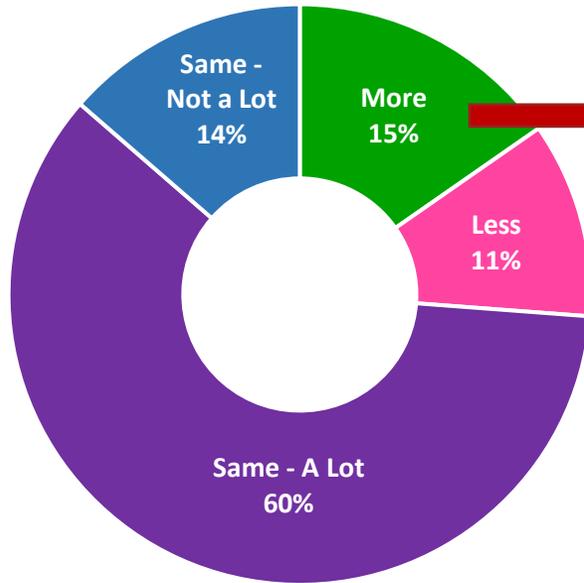
Among the 76% who are very or somewhat interested in new music/new artists primary source for new music discovery



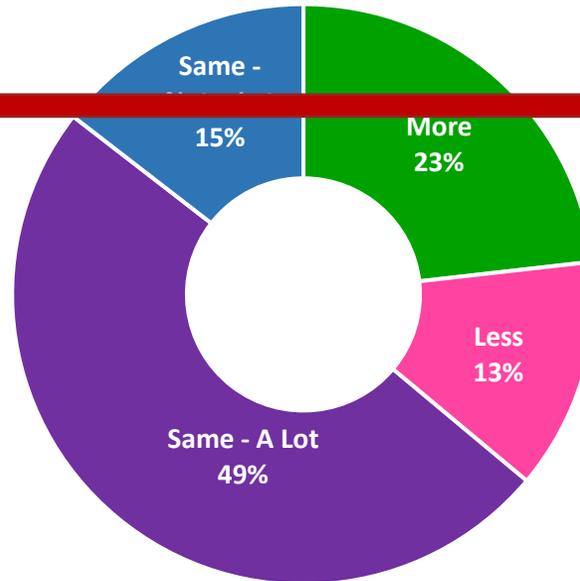
**Post-pandemic, why are some radio fans listening to LESS radio? It's a combo of WFH, unforced errors, and more choice.**

# AM/FM Radio Listening Momentum Holds Firm

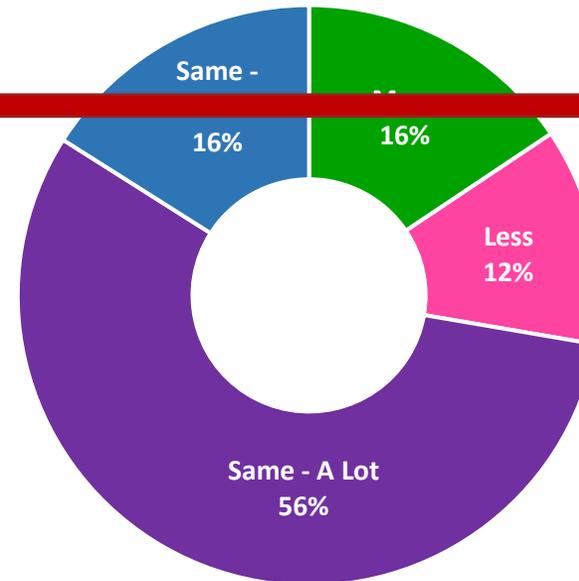
TS 2020



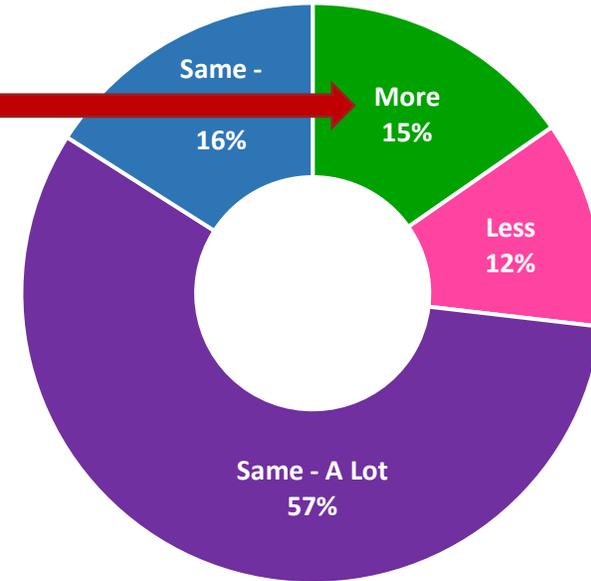
TS 2021



TS 2022

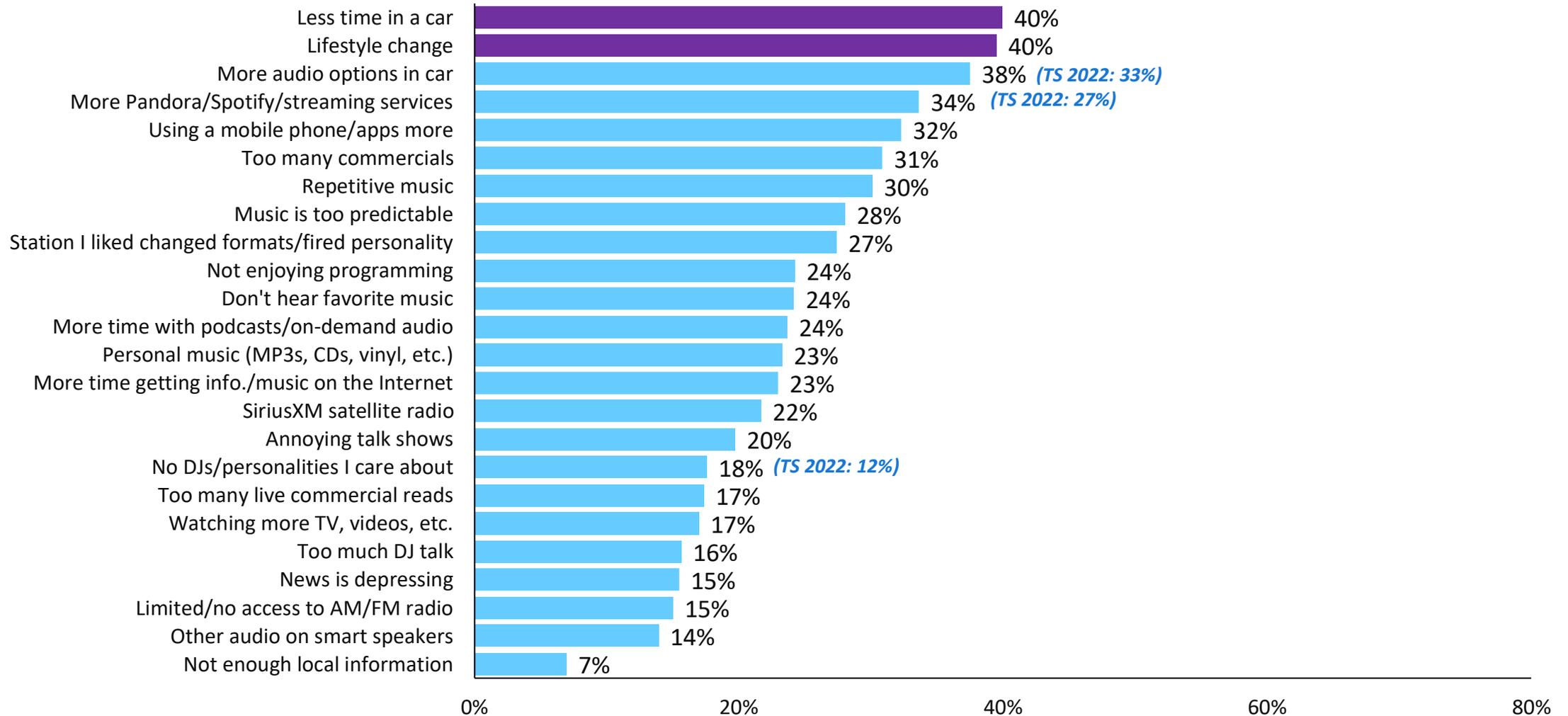


TS 2023



Among those who listen to AM/FM radio

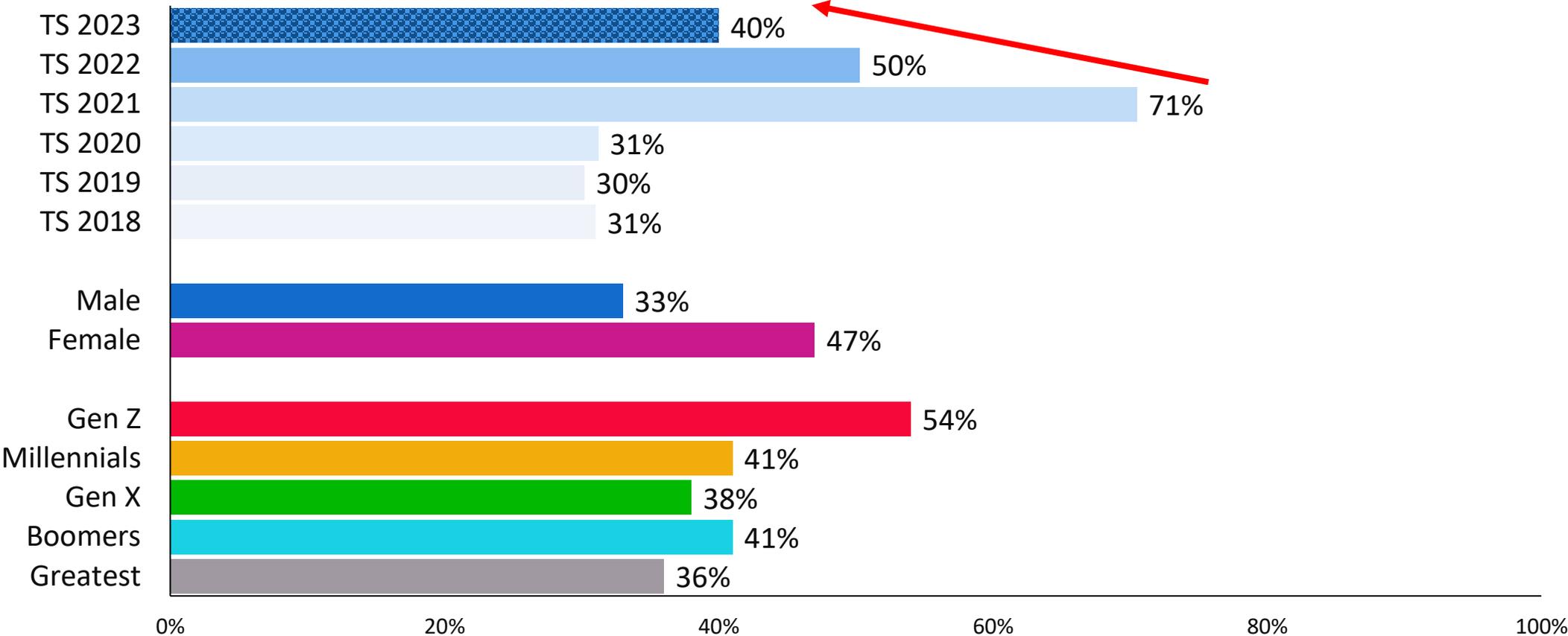
# Why Less Radio? The Pandemic's Impact Has Been Reduced



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

# While Still the Top Post-Pandemic Reason for Listening to Less Radio, Less Time Spent In-Car Continues to “Normalize”

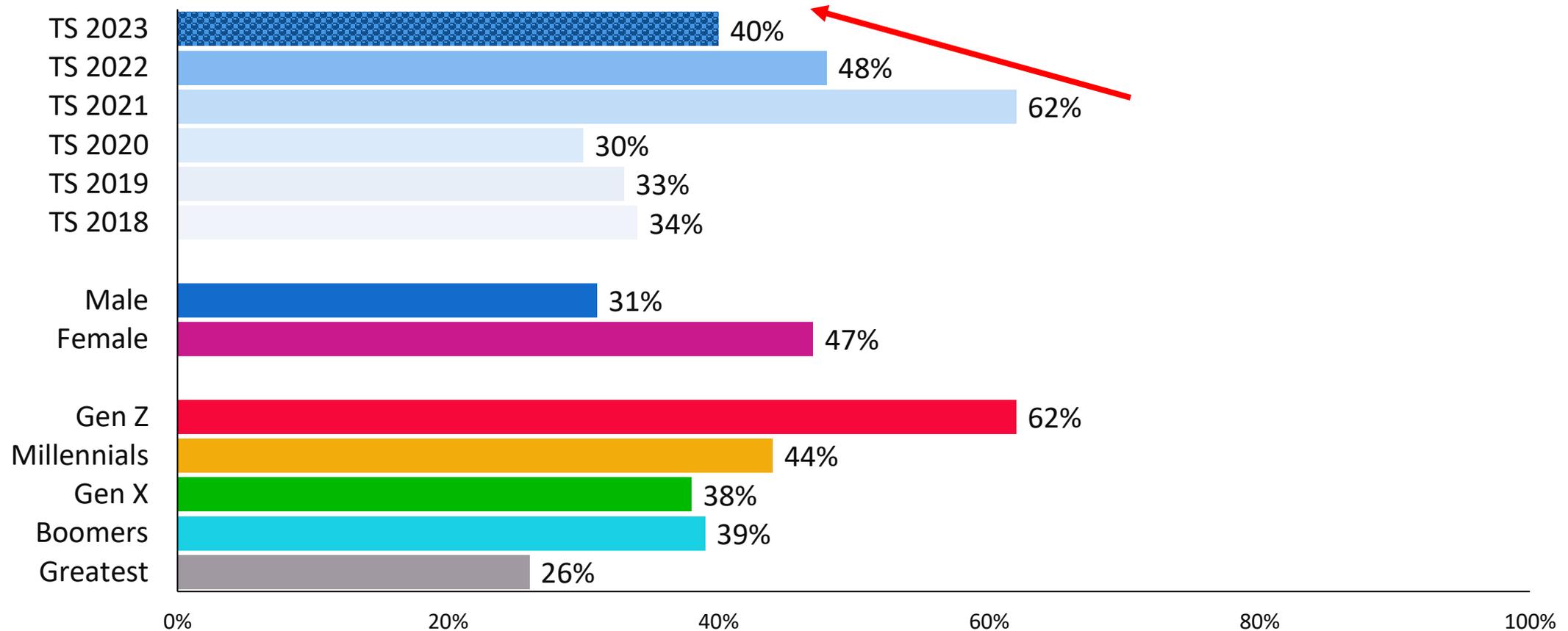
*“Spending Less Time in a Car”*



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

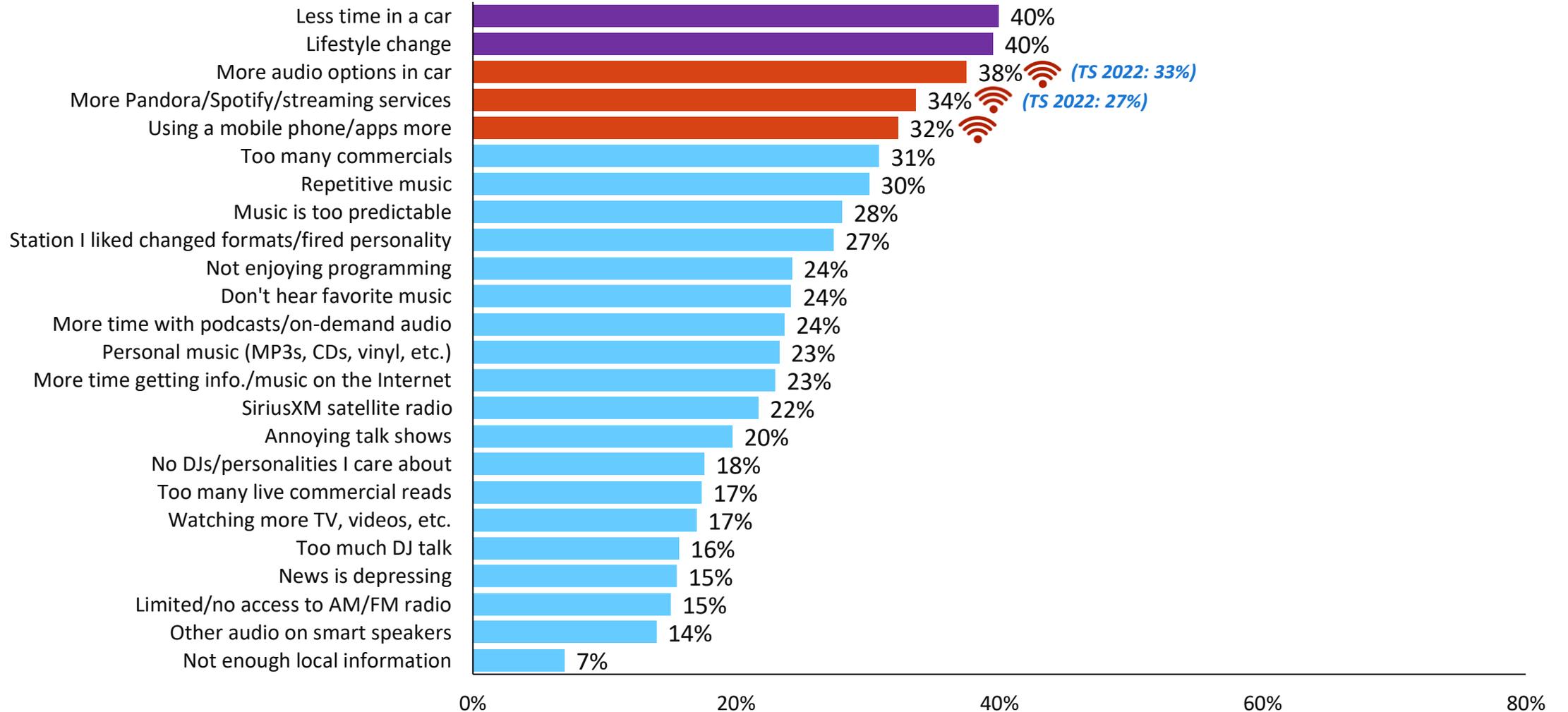
# The Lifestyle Tumult From COVID Is Slowing, But Still Taking a Toll

*“A Lifestyle Change”*



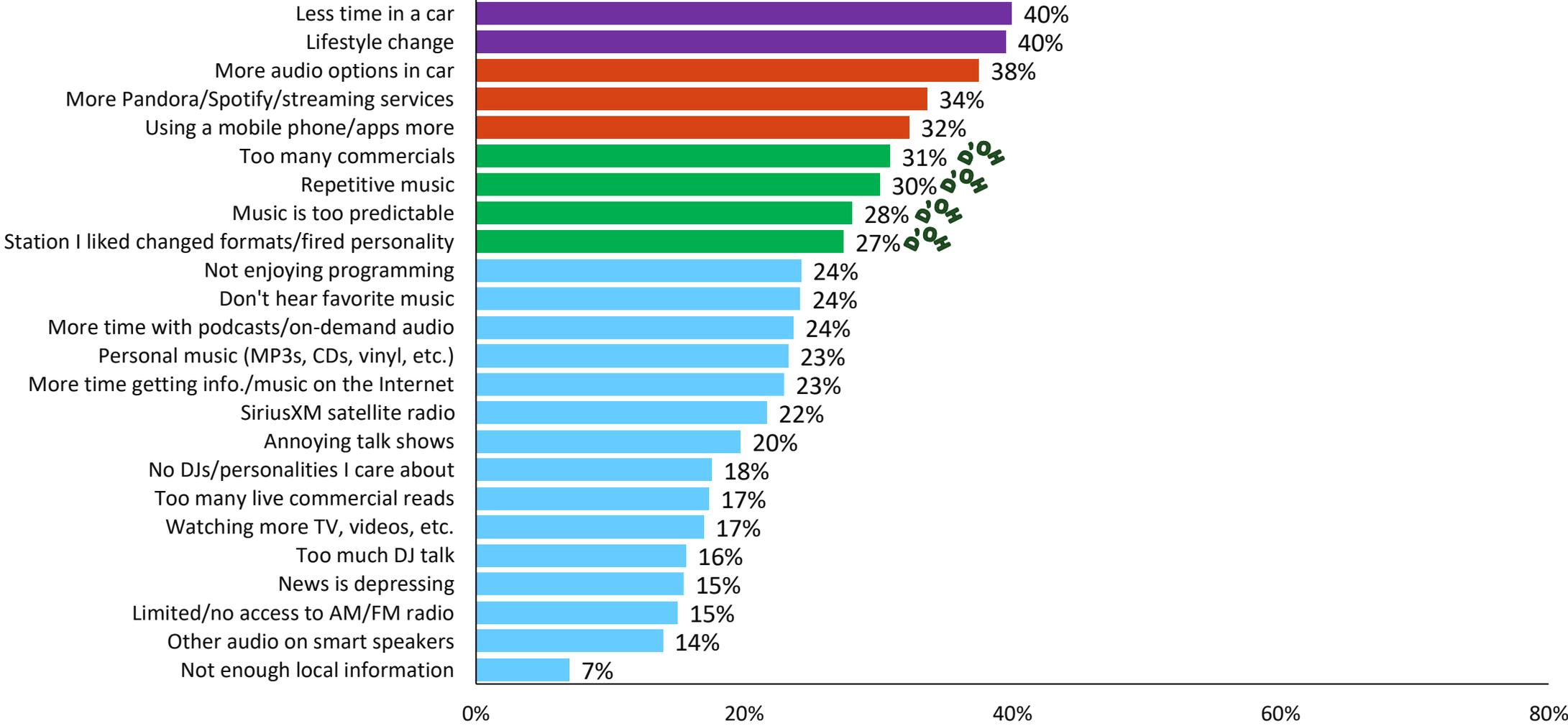
Among those who say they are listening less to AM/FM radio in the past year, % who say this is a main reason they listen less

# Why Less Radio? More Options Are Eroding Listening



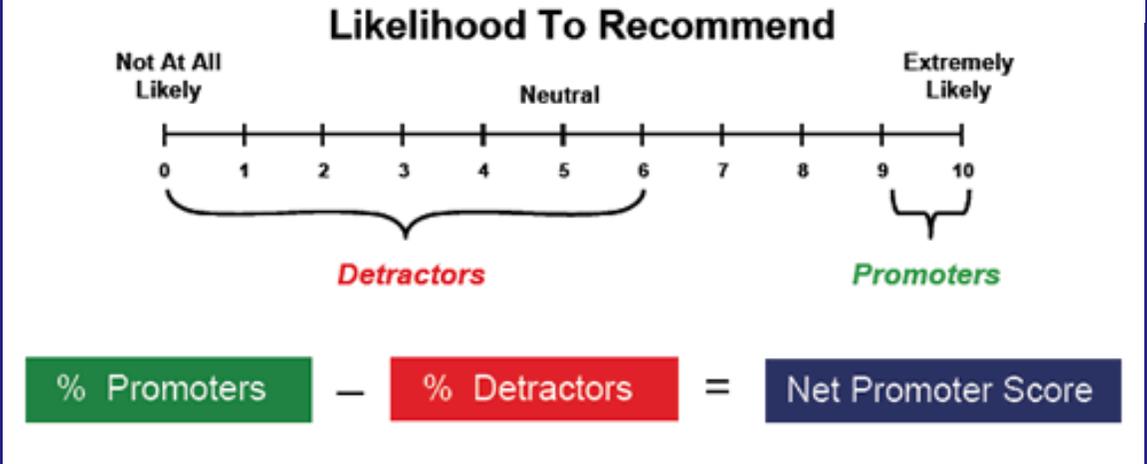
Among those who say they are listening less to AM/FM radio in the past year, % who say this is a main reason they listen less

# Why Less Radio? Unforced Errors Are Causing Tuneout



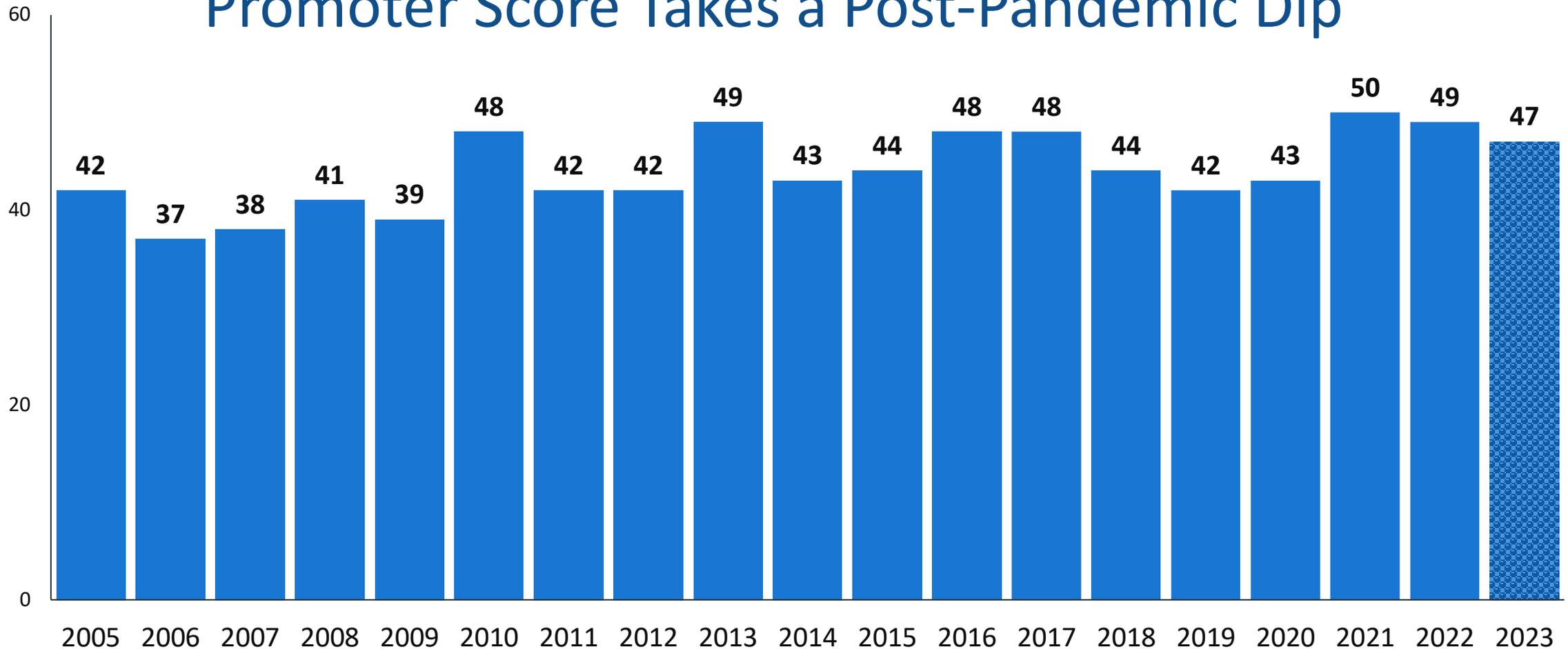
Among those who say they are listening less to AM/FM radio in the past year, % who say this is a main reason they listen less

# NET PROMOTER

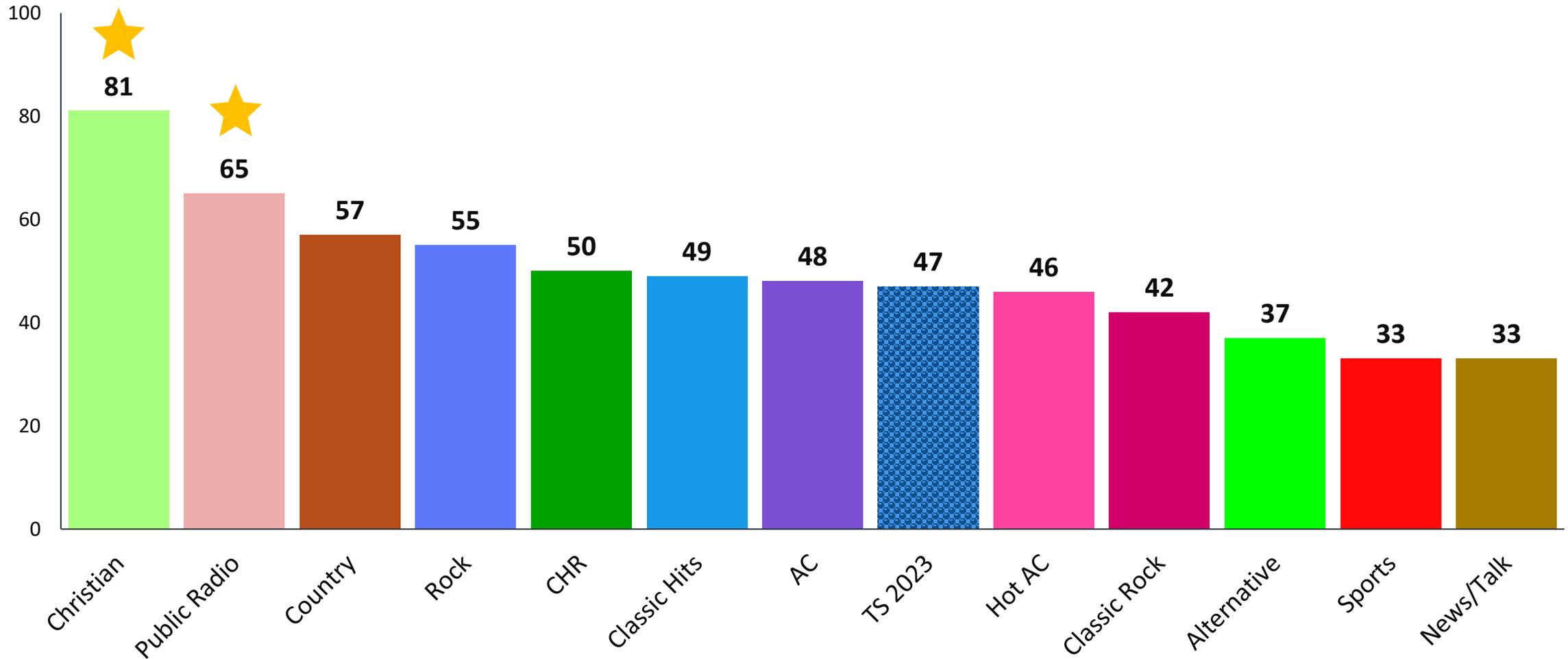


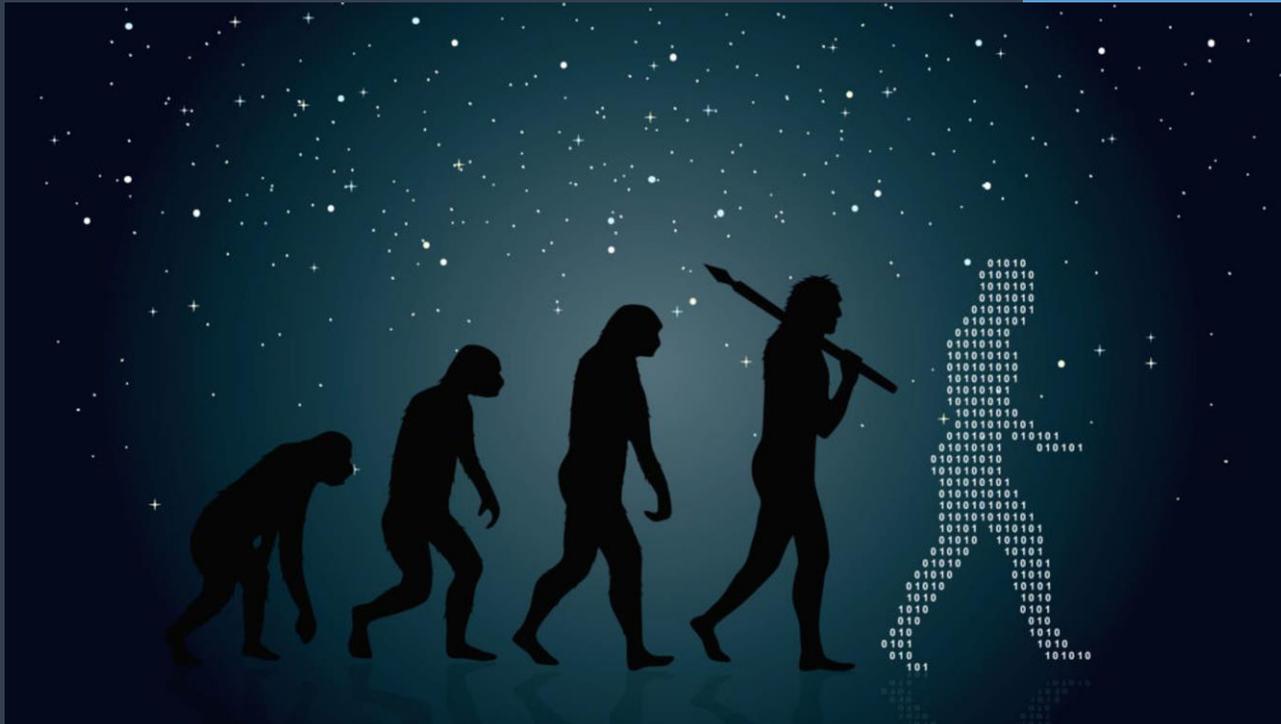
Radio's word-of-mouth scores (Net Promoter) take a post-COVID dip.

# While the P1s Are Still Hanging In, Radio's Net Promoter Score Takes a Post-Pandemic Dip



# As Per Usual, Christian Radio Leads NPS, Followed by Public Radio, Country and Rock

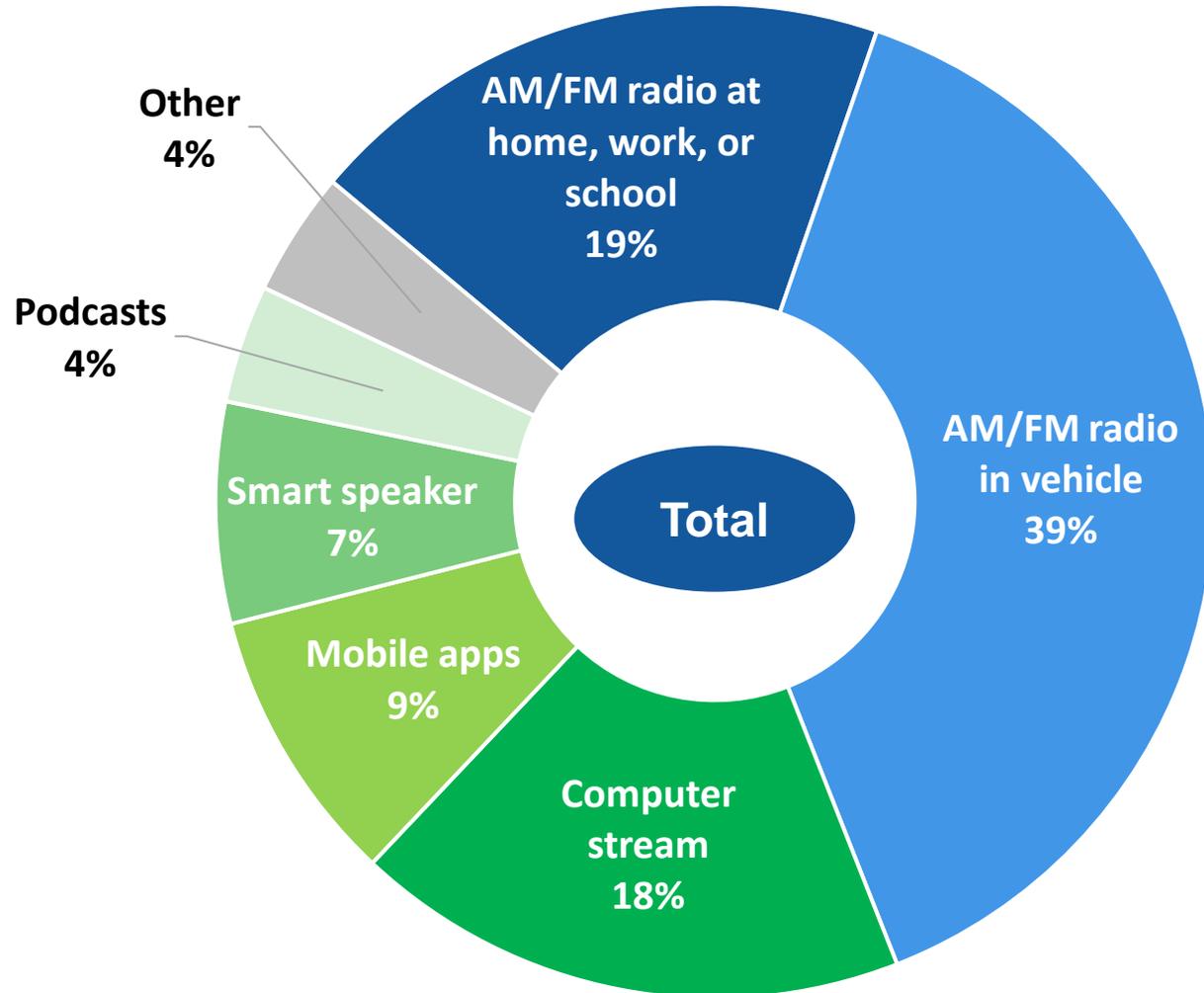




[This Photo](#) by Unknown Author is licensed under [CC BY-ND](#)

**When it comes to radio listening, the gap between traditional and digital listening is narrowing as streaming grows.**

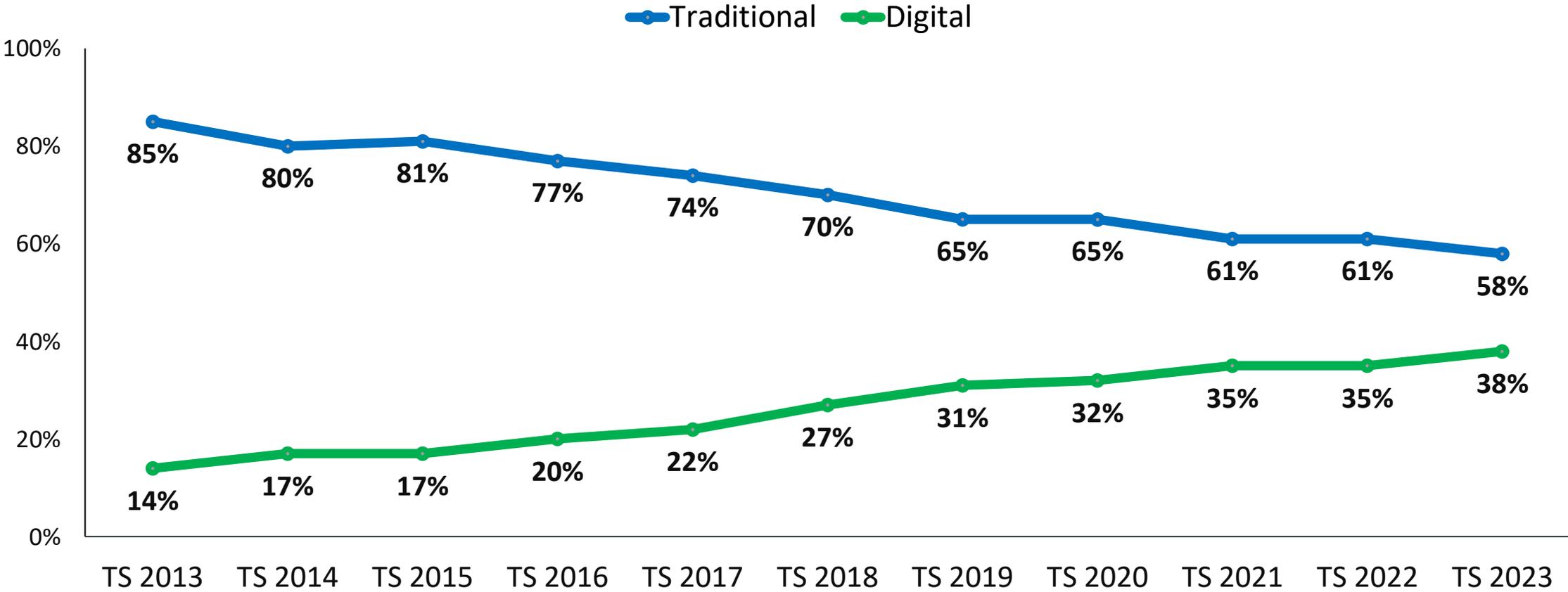
# How Do Radio Fans Listen to Their Favorite Stations? Digital Platforms Continue to Broadly Grow.



Traditional – 58%  
Digital – 38%

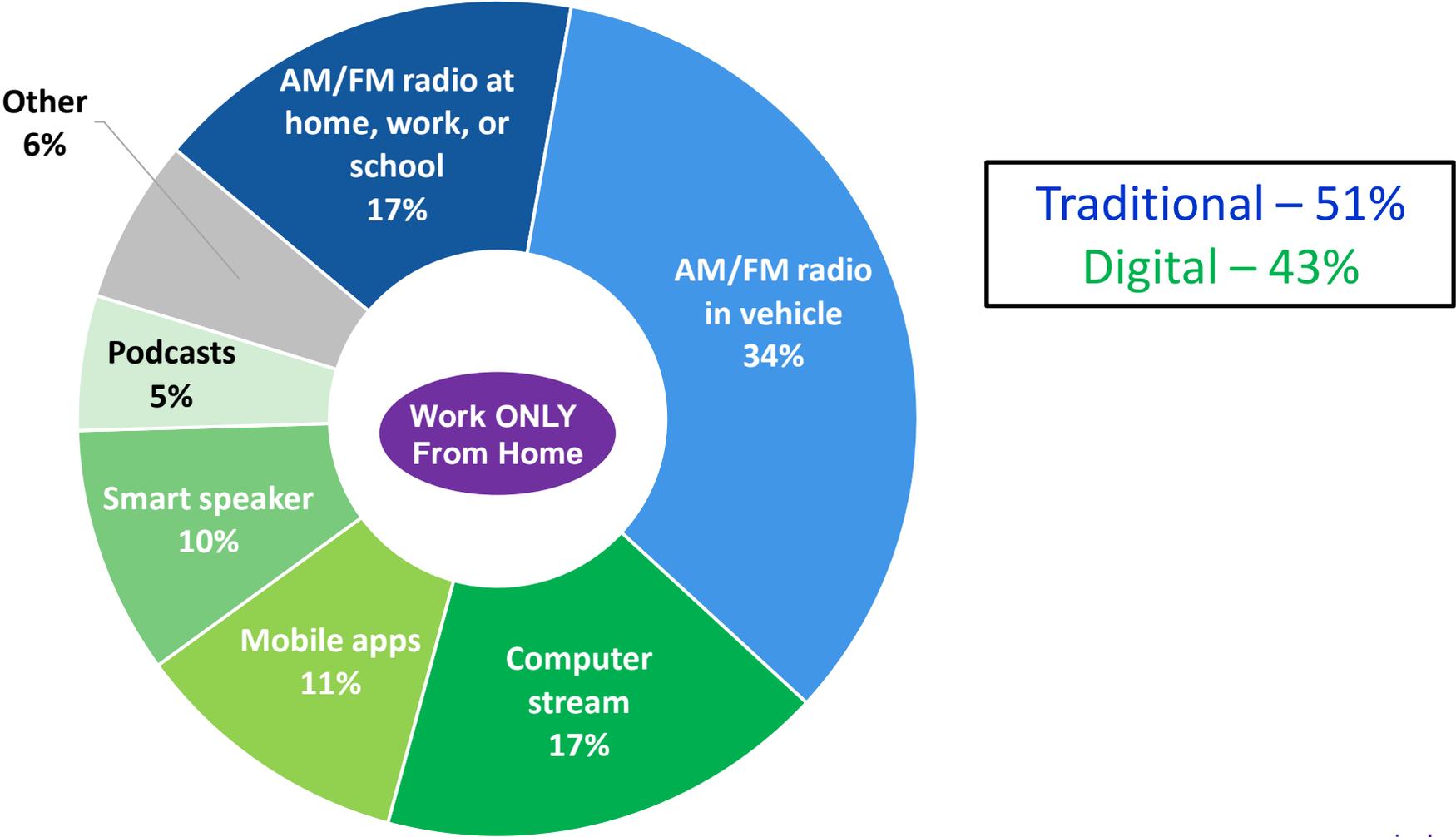
TS 2022  
Traditional – 61%  
Digital – 35%

# P1 Station Listening Platform Trend: Traditional vs. Digital



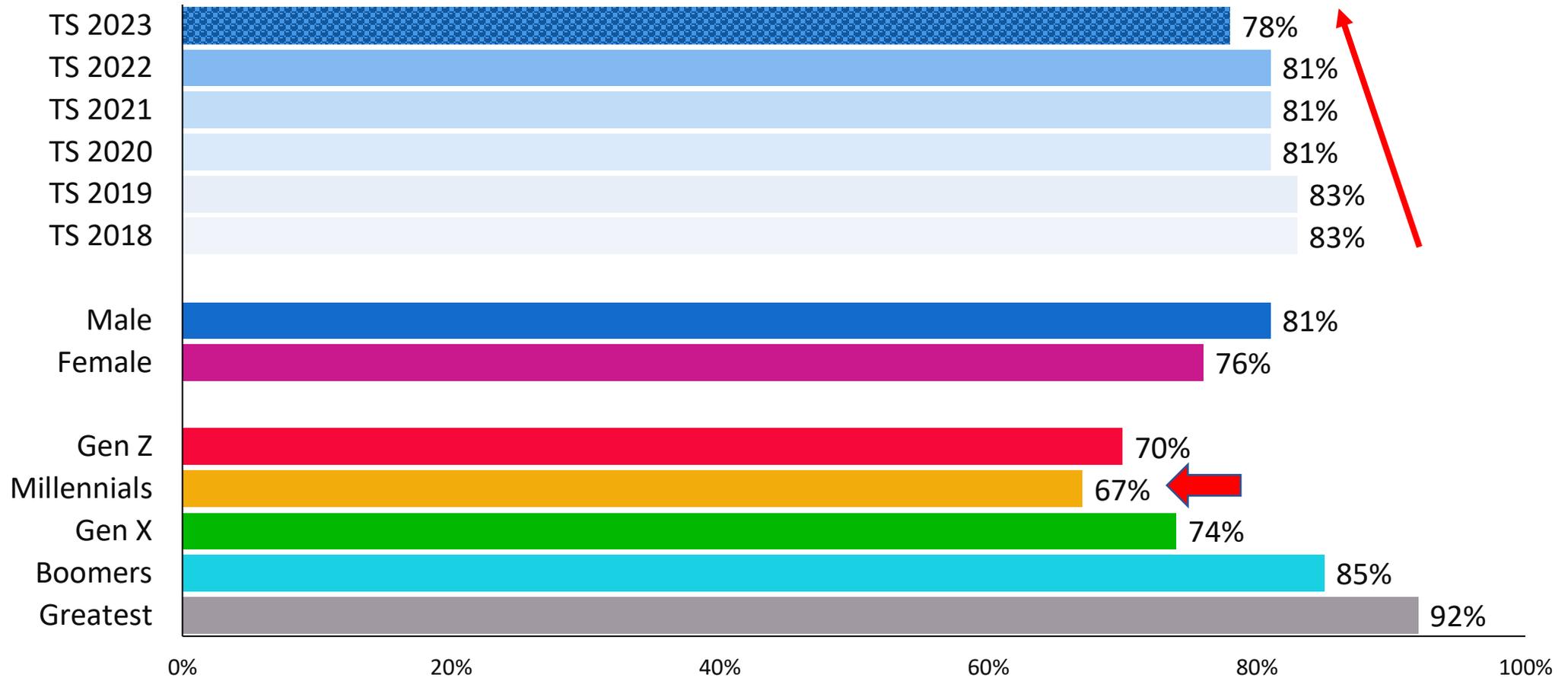
% of time spent with P1 station in a typical week via traditional platforms (an AM/FM radio at home/school/work or in a vehicle) vs. digital platforms (computer, mobile, smart speaker, podcasts)

# Those who WFH 100% of the Time Are Especially Likely to Listen to Their P1 Station on Digital Platforms



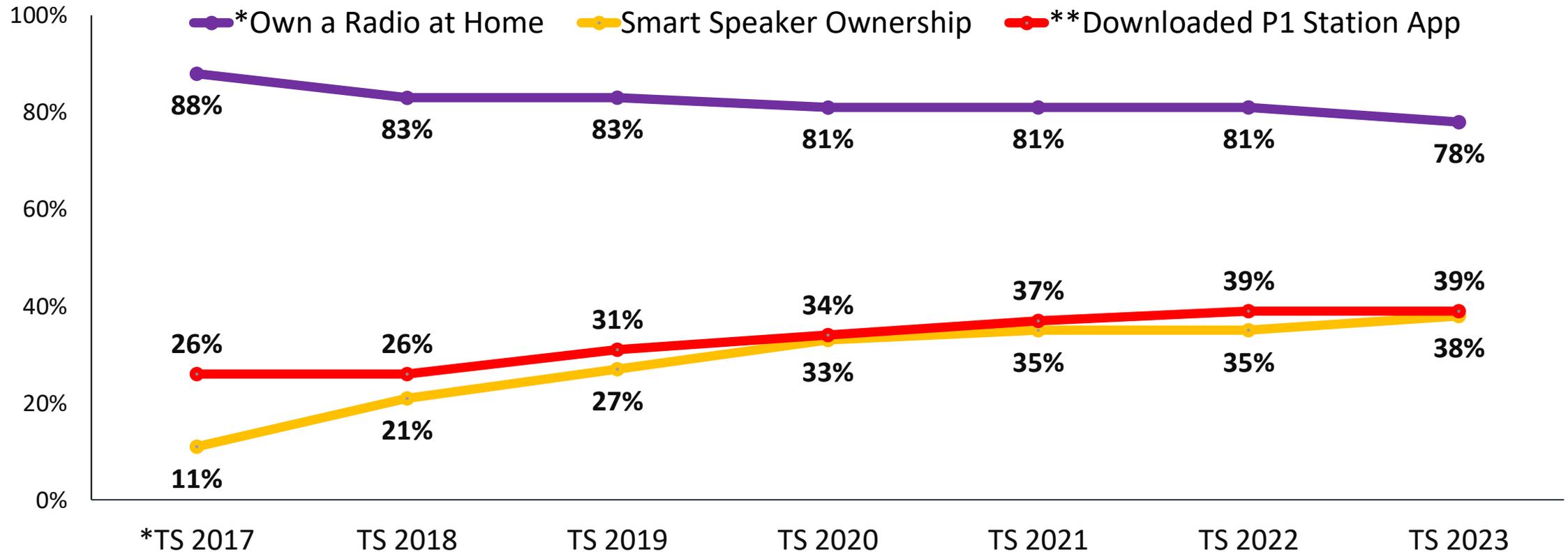


# Fewer Than Eight in Ten Now Have a Regular Radio Where They Live, Much Less So For Millennials

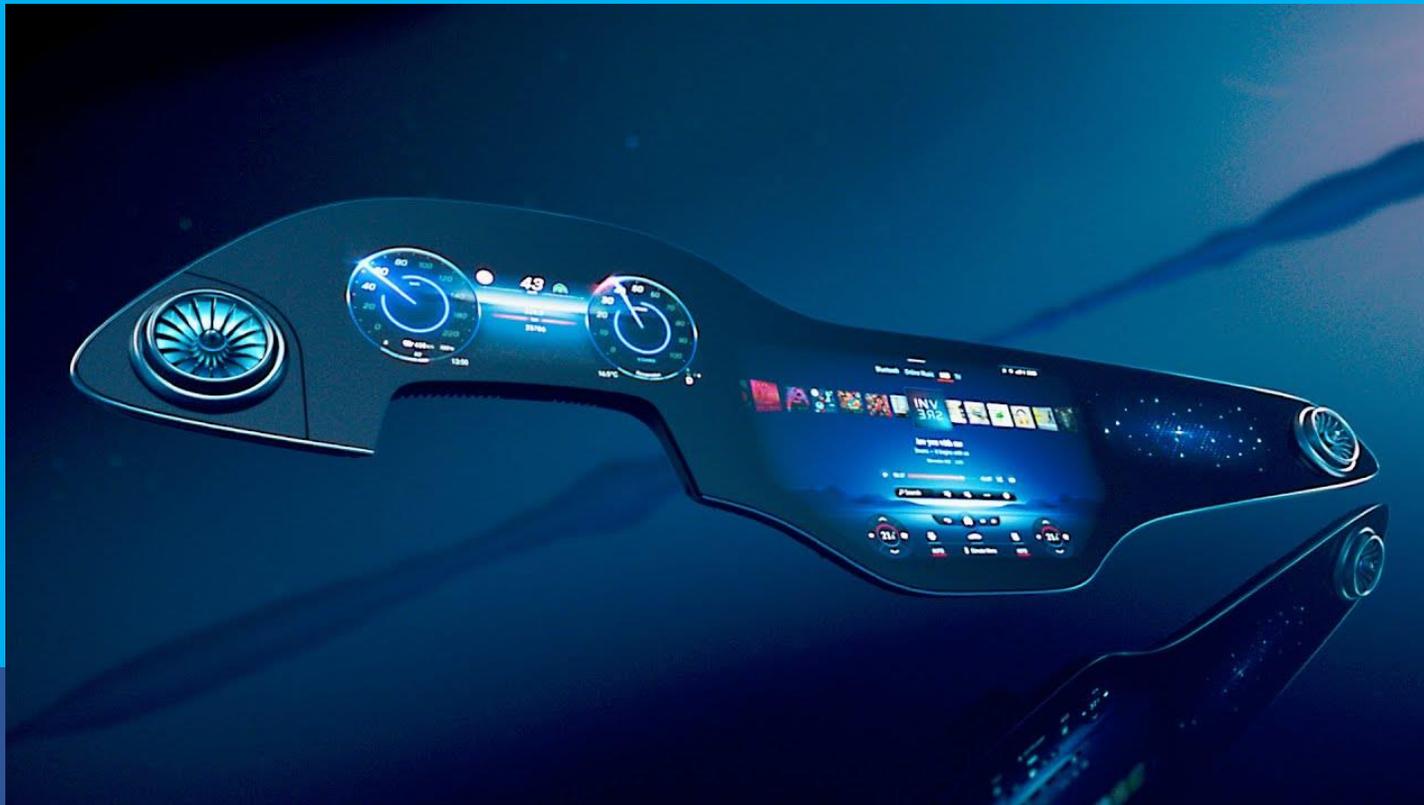


% with a regular radio in working condition where they live that they use

# As “Regular Radios” Disappear in Homes, Smart Speakers and Mobile Are Growing as Viable Alternatives

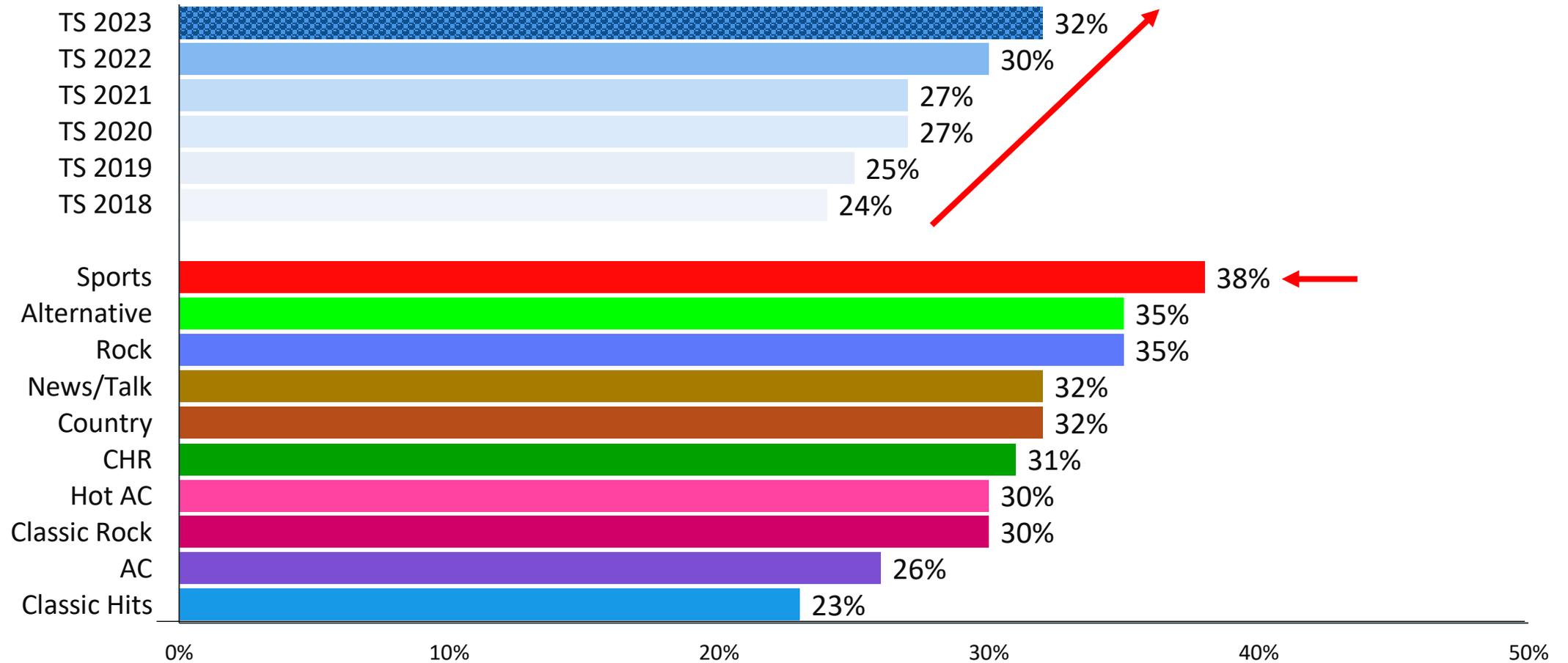


% who own a working radio at home that they use  
vs. own a smart speaker vs. have downloaded their P1 station app  
(\*excluded wording “that you use”; \*\*among smartphone/tablet owners)



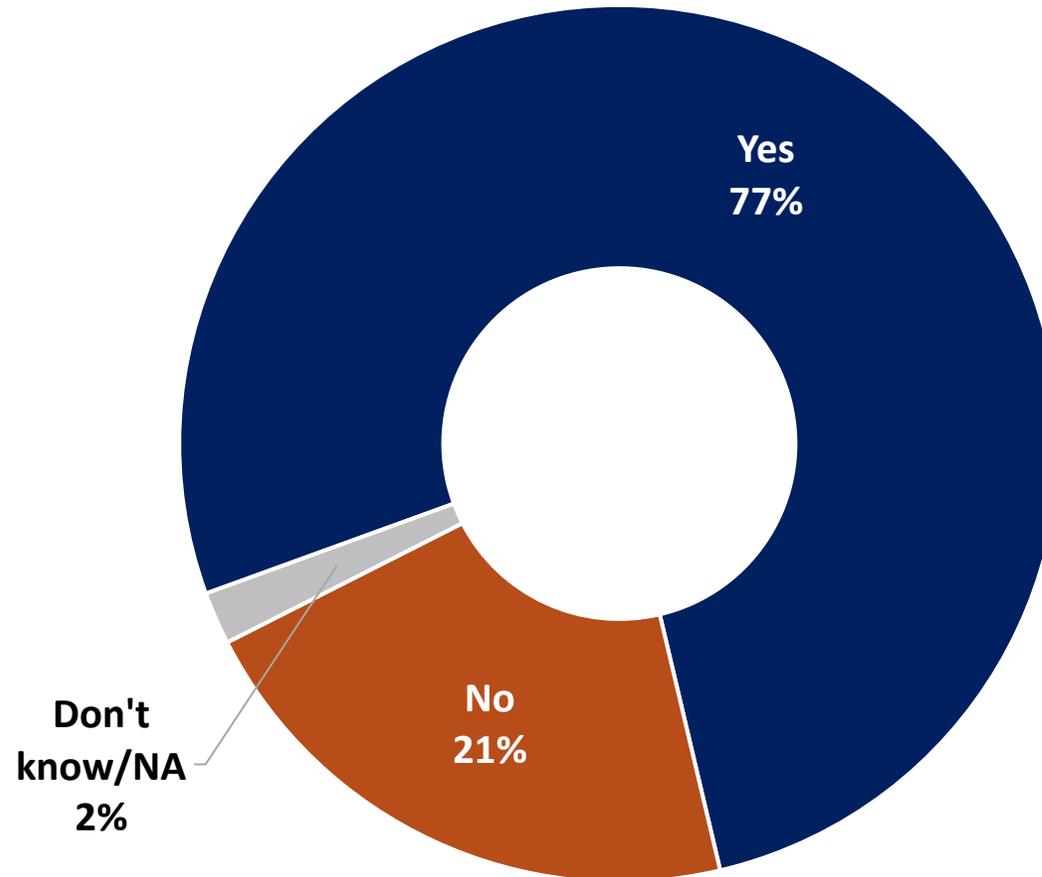
The car dashboard continues to evolve, giving drivers and passengers new options.

# Nearly One in Three Now Owns an In-Car Media System, Led by Sports Fans



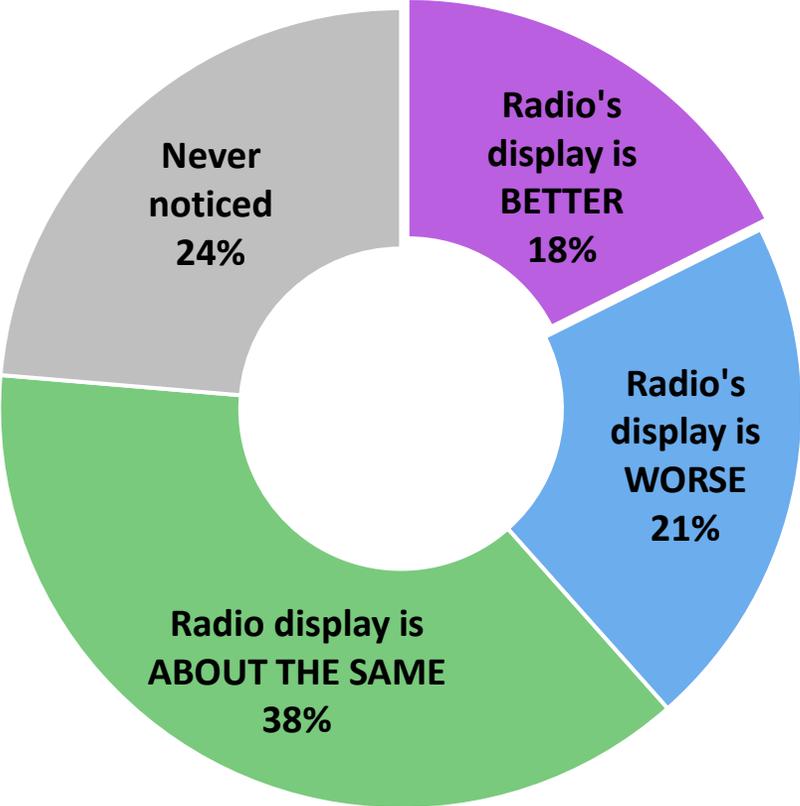
# Metadata Matters: More Than Three in Four Own Vehicles That Display Artist and Title Information

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



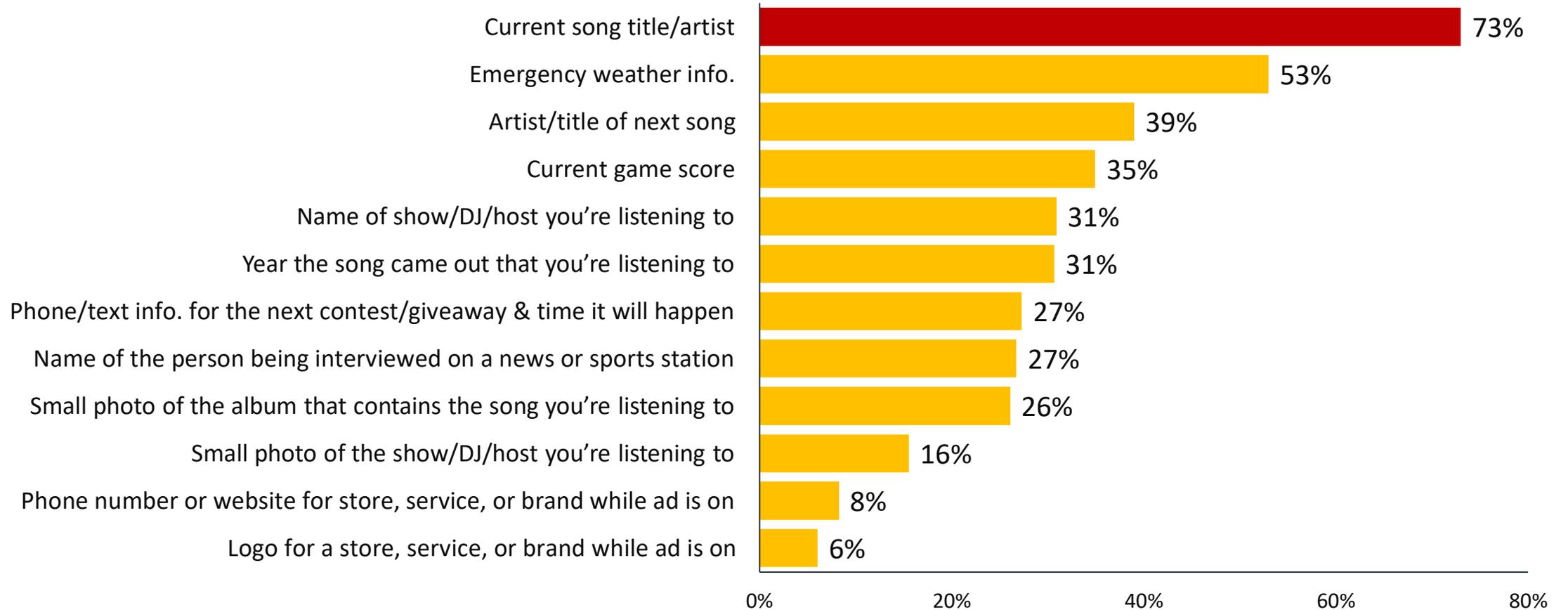
# Radio Station Dashboard Displays Are Generally Seen as Comparable to Displays From Other Types of Audio

*“How does the dashboard display when you’re listening to a radio station in your car compare to what you see if you’re listening to streaming music, satellite radio, or other sources?”*



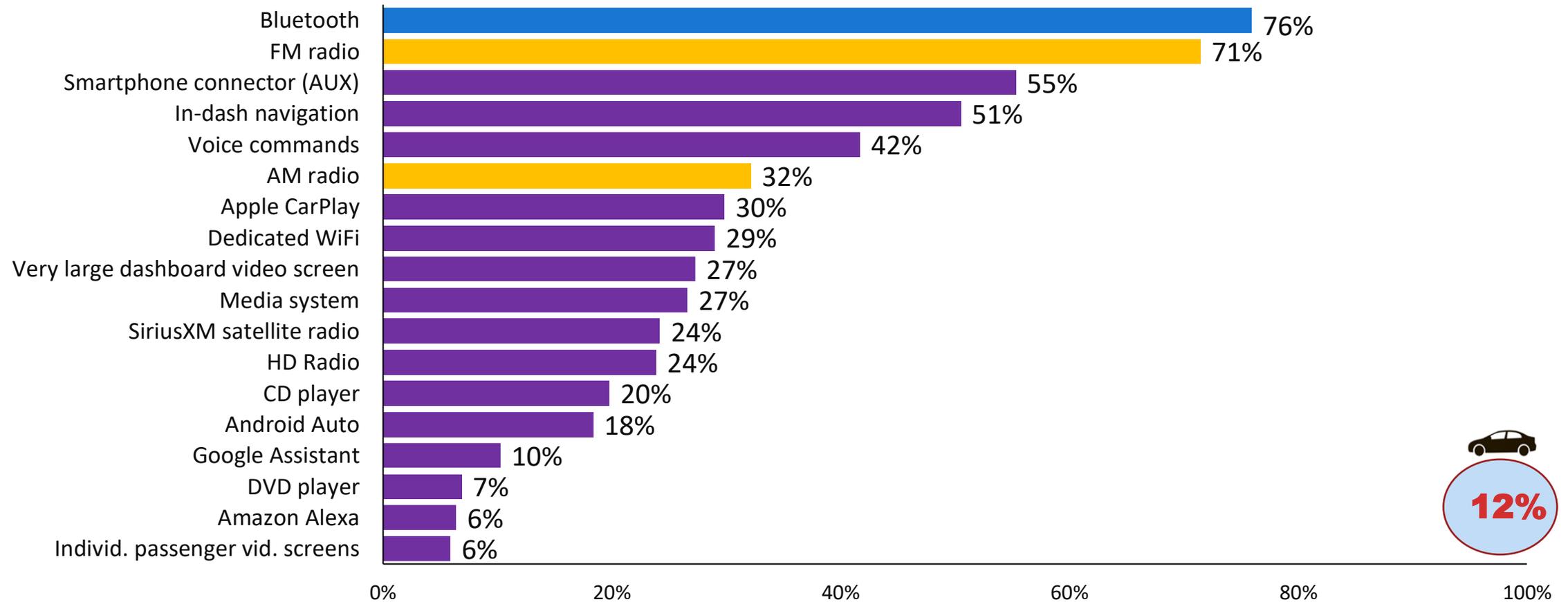
Among those with car dashboard having the ability to display artist/title info. and gave a response

# Artist/Title Info. and Emergency Weather Are of Most Interest Among Car Dashboard Display Elements



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

# Bluetooth Holds Its Lead Over FM Radio as the Most Important Feature For New Car Buyers; AM Is Down the List

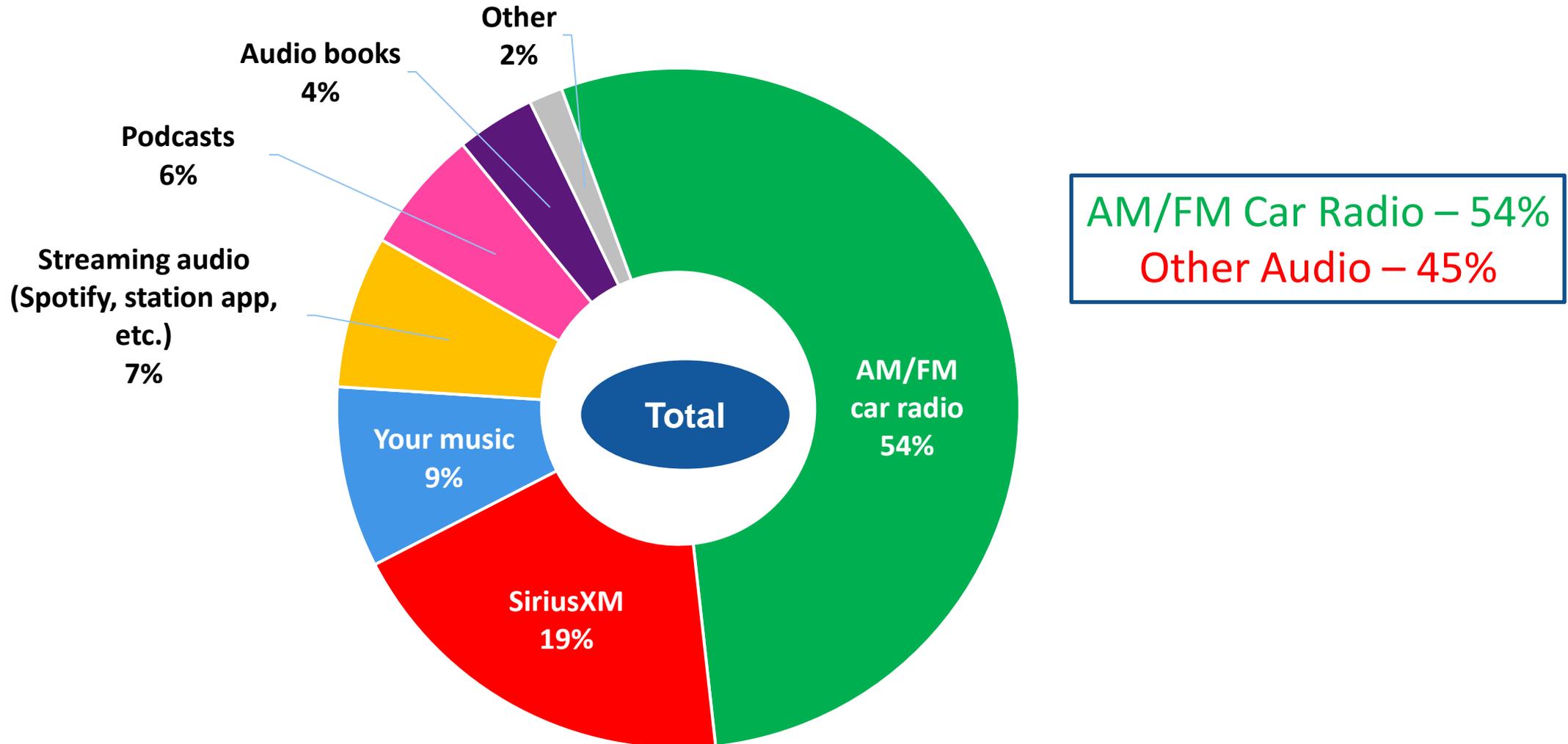


“Very Important” features among those planning on buying/leasing (or already bought) a new vehicle in 2023

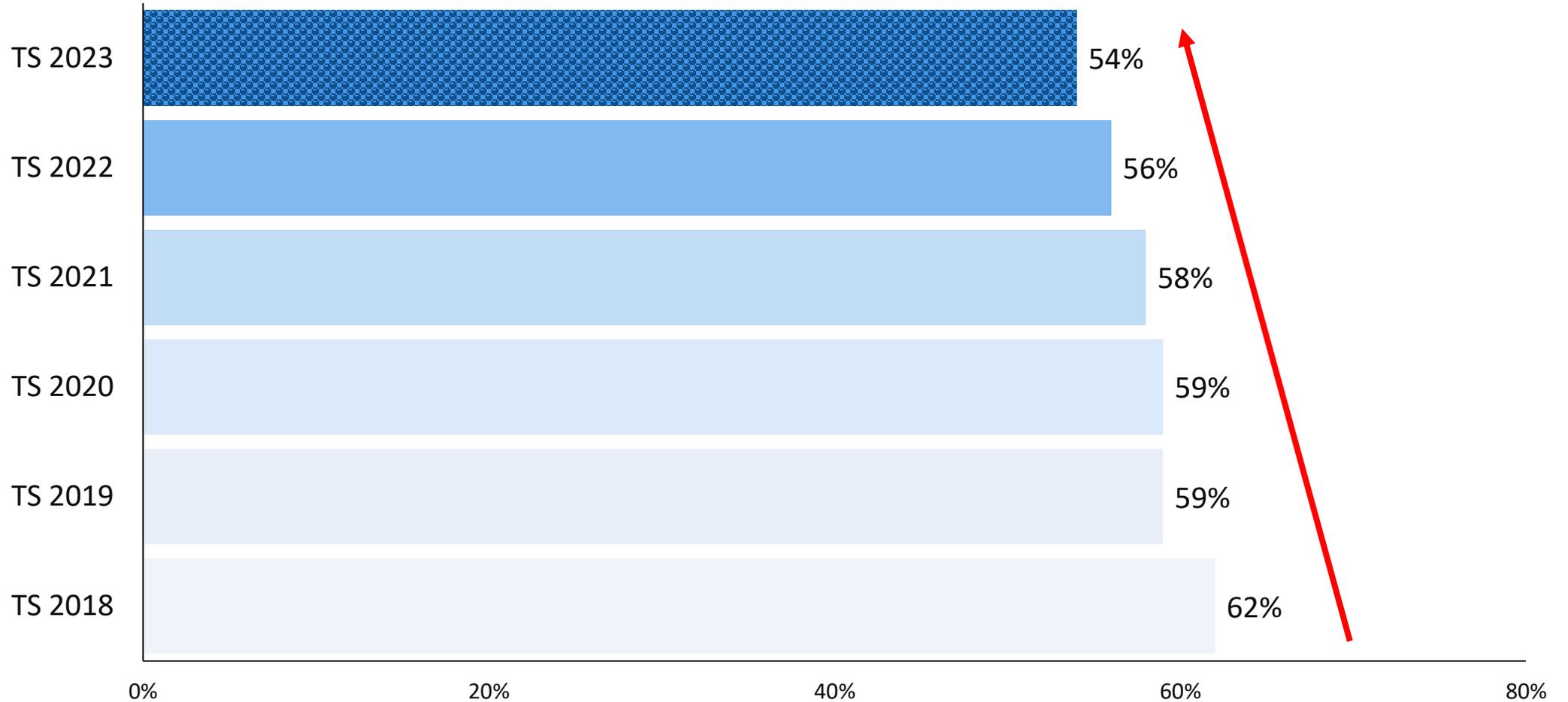


**In-car radio listening is facing ongoing challenges due to more media options.**

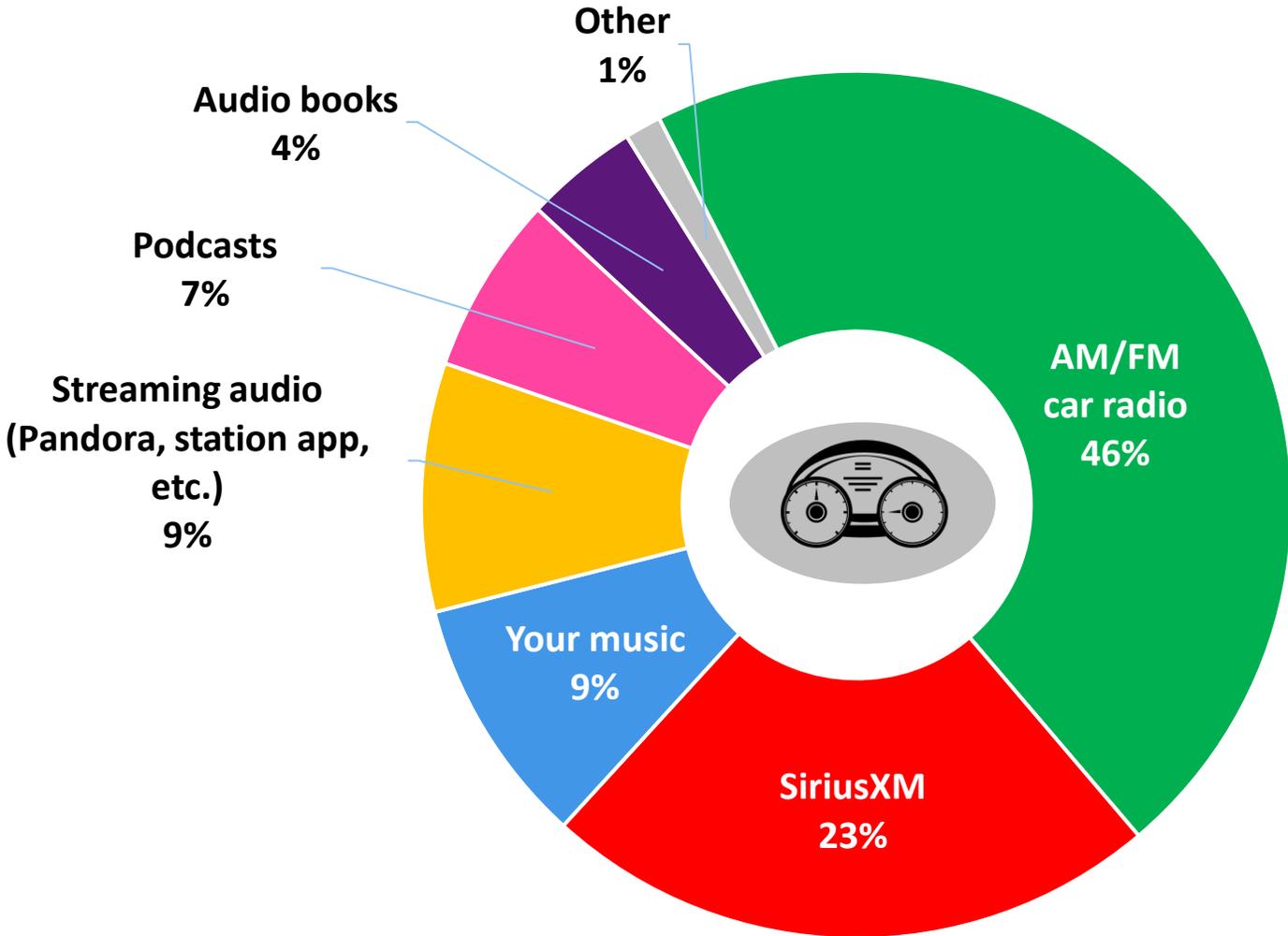
# AM/FM Car Radio Still Makes Up the Majority of In-Car Audio Usage, But Demographics Tell an Important Story



# AM/FM Radio Listening in the Car Continues to Erode



# Among Drivers With a “Connected System,” a Majority of Time Spent With Audio Is Digital or SXM



AM/FM Car Radio – 46%  
Other Audio – 52%

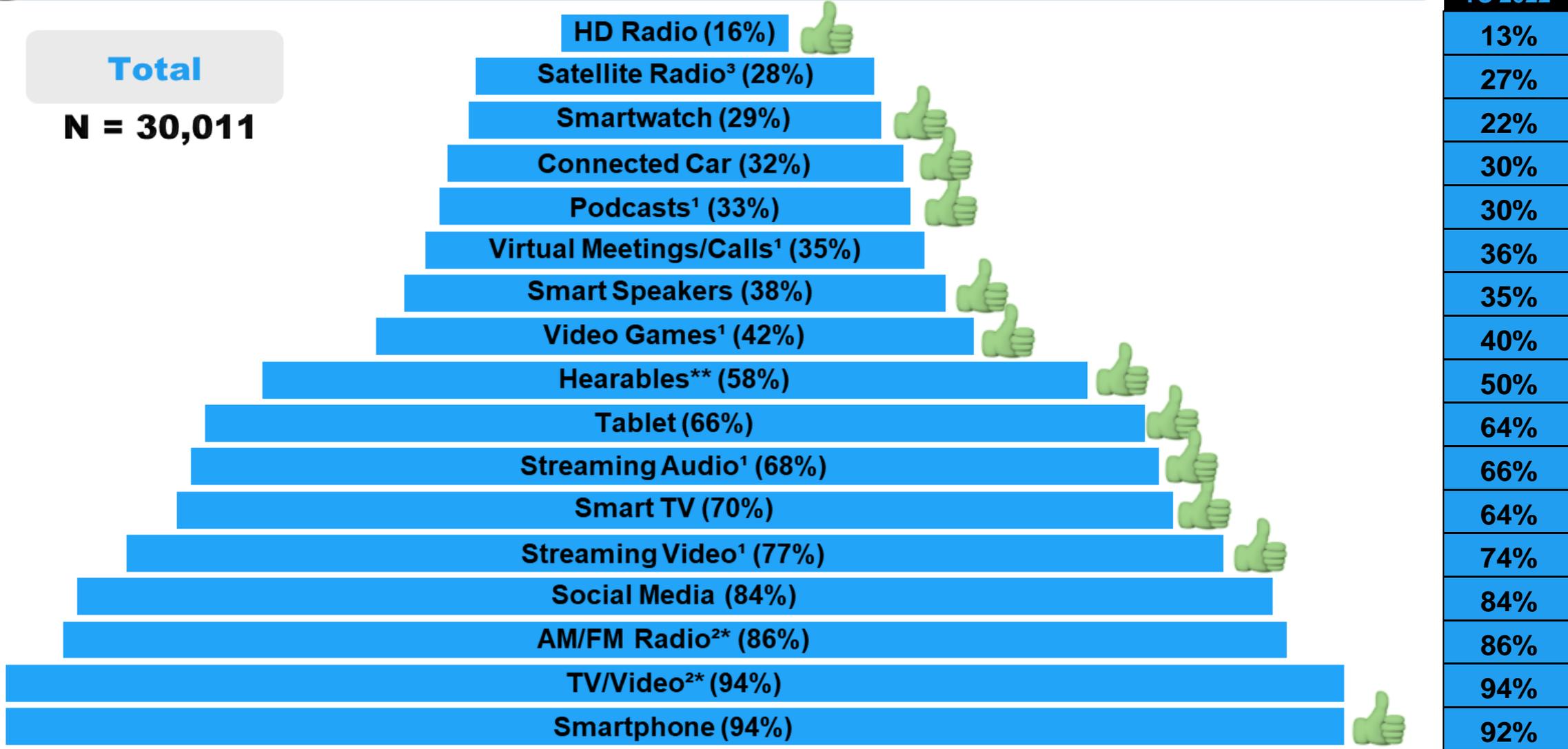




# Media Pyramid 2023

Total

N = 30,011



<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



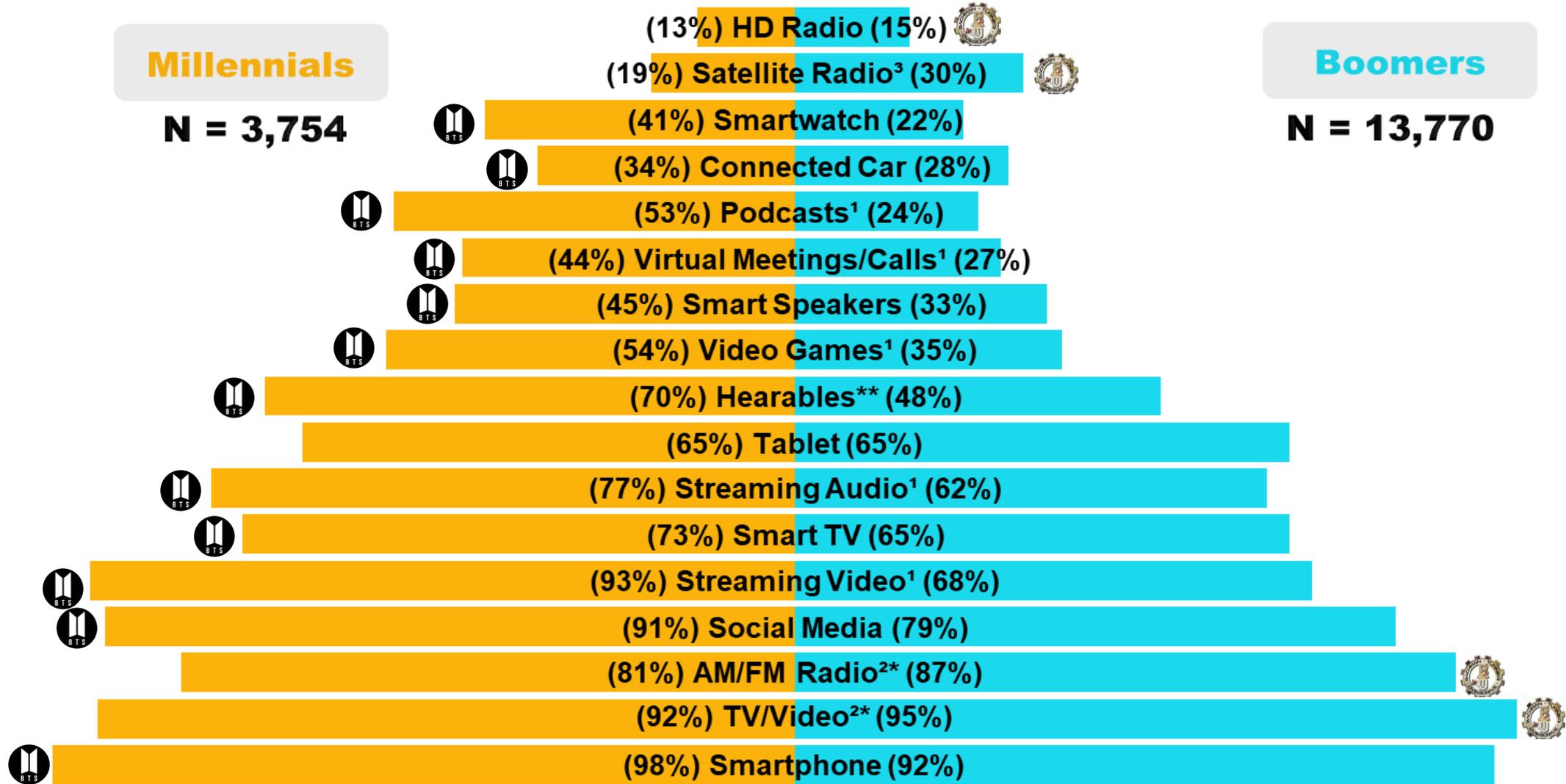
# Media Pyramid 2023

**Millennials**

**N = 3,754**

**Boomers**

**N = 13,770**



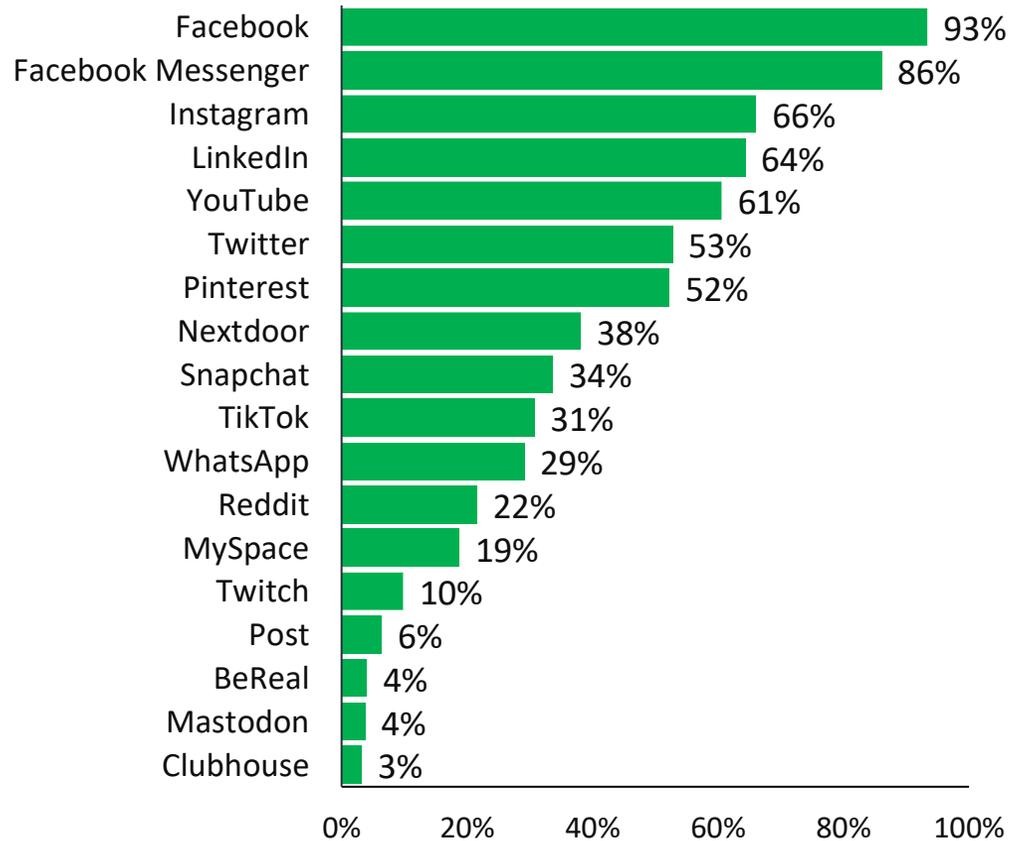
<sup>1</sup> Weekly or more <sup>2</sup> 1+ hour per day <sup>3</sup> Paid & trial users \*Any platform/device \*\*Wireless headphones/earbuds



**Facebook continues to rule the social space, but its bet on the Metaverse is clearly premature.**

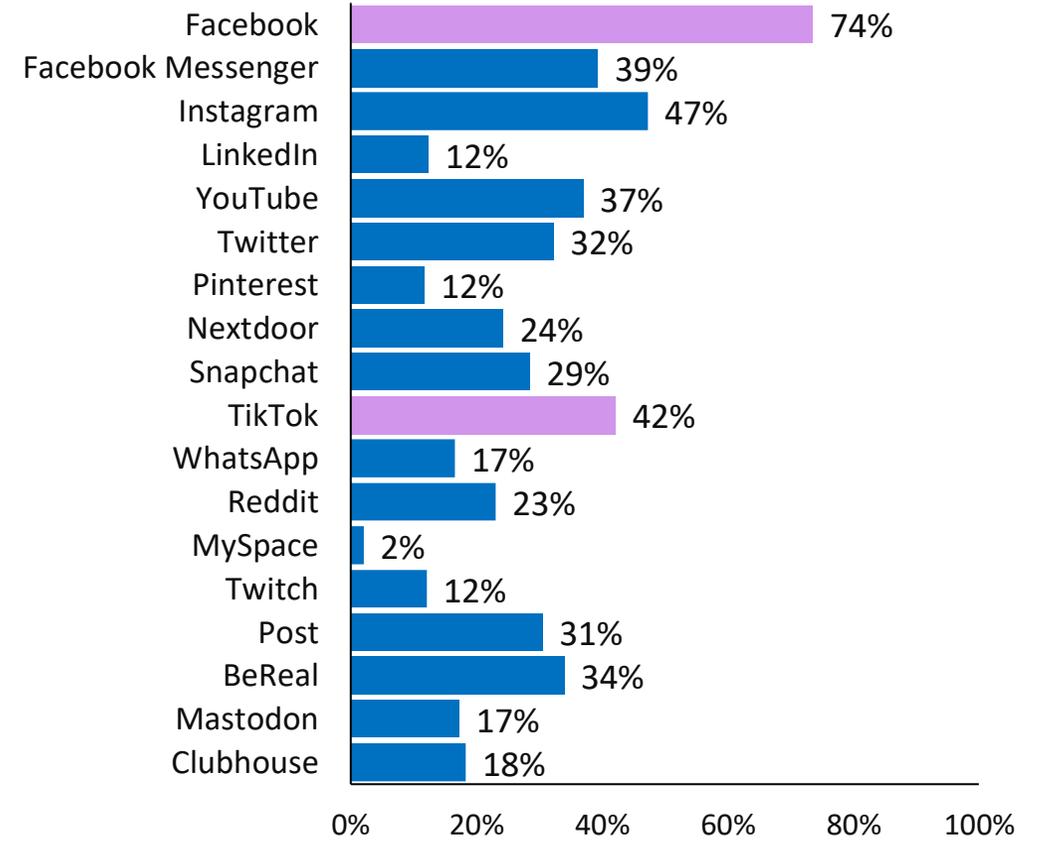
# Facebook Remains Far and Away the Leader for Daily Usage Among Those With a Social Media Profile

% Who Have a Profile on (Platform)



Among those with any social media profile

% Who Use (Platform) Daily

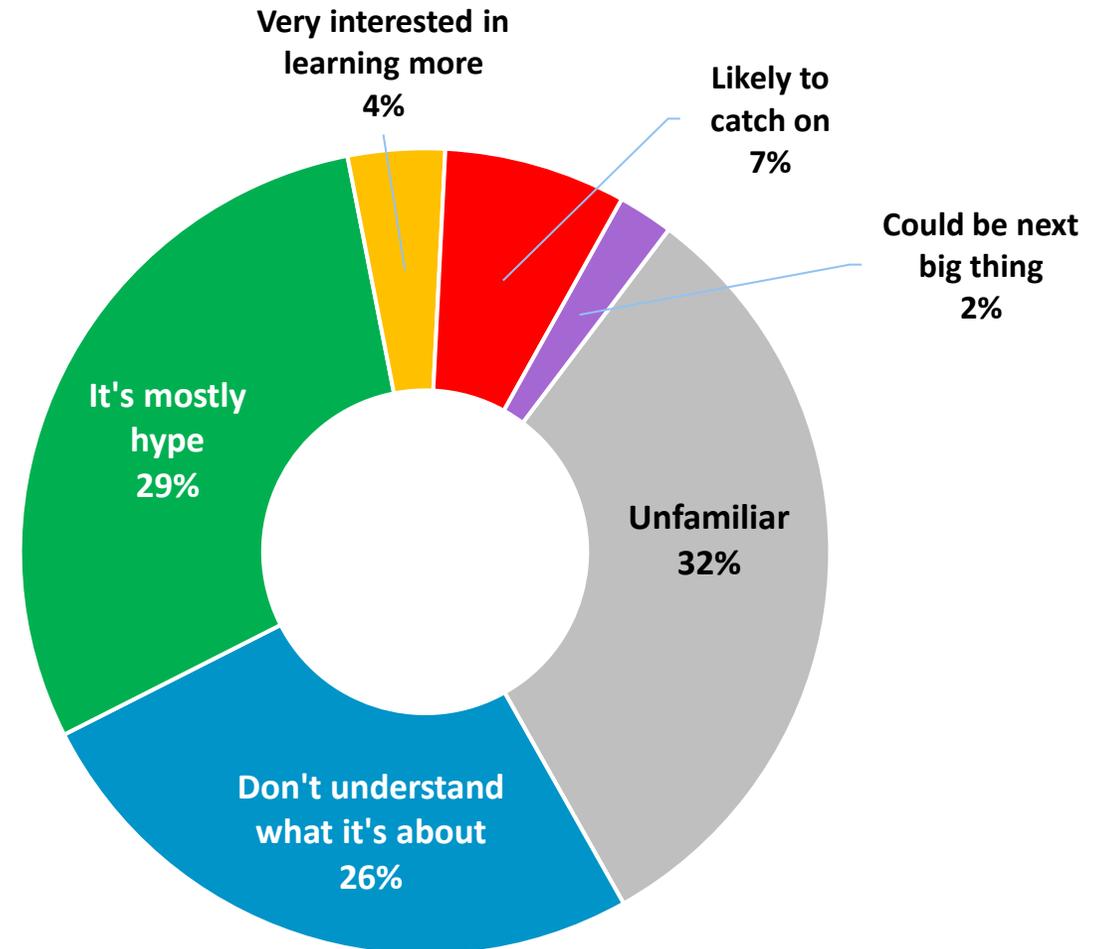


Among those with a profile on (platform)

# Public Awareness and Perception of the Metaverse Has a Long Way to Go

*“You may be familiar with ‘the Metaverse’ – sometimes defined as a single, universal, and immersive virtual world facilitated by the use of virtual reality and augmented reality headsets, such as Meta’s Quest/Quest Pro (also known as Oculus), Sony PlayStation VR, and the rumored upcoming headset by Apple.*

*Based on what you know about ‘the Metaverse,’ which of the following best represents your opinion?”*



## Opinion on the Metaverse

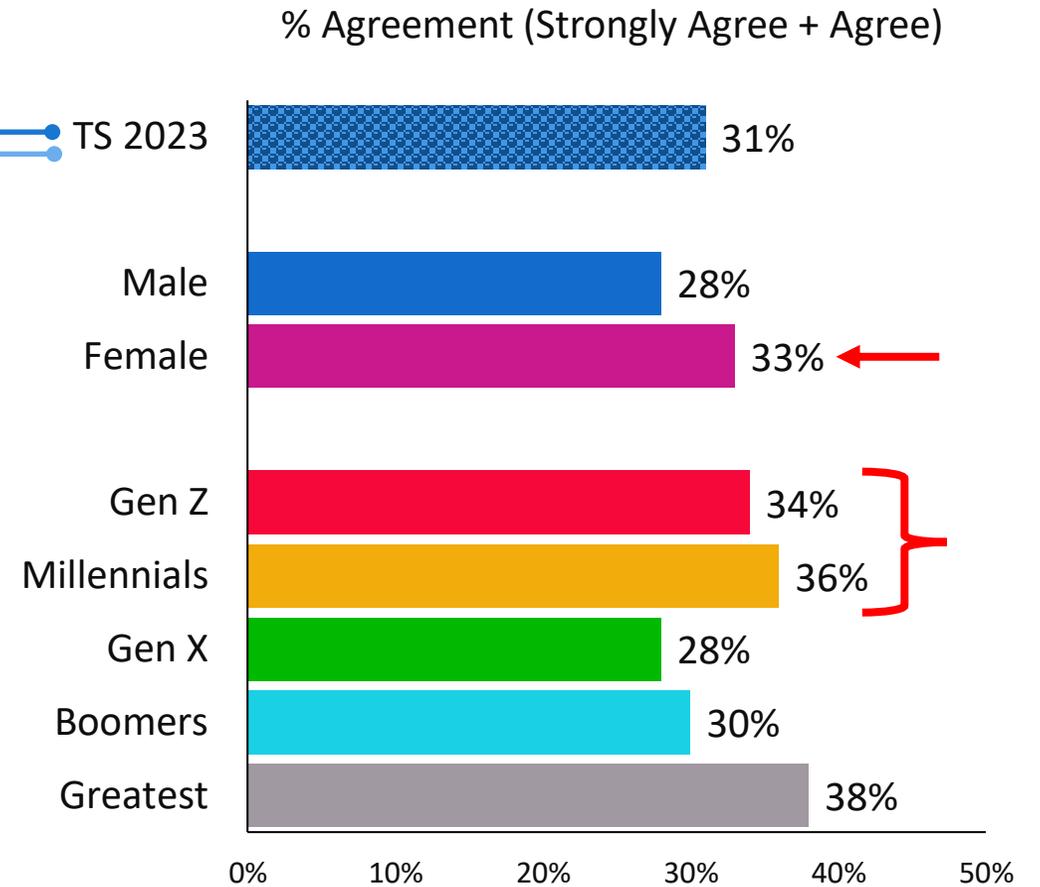
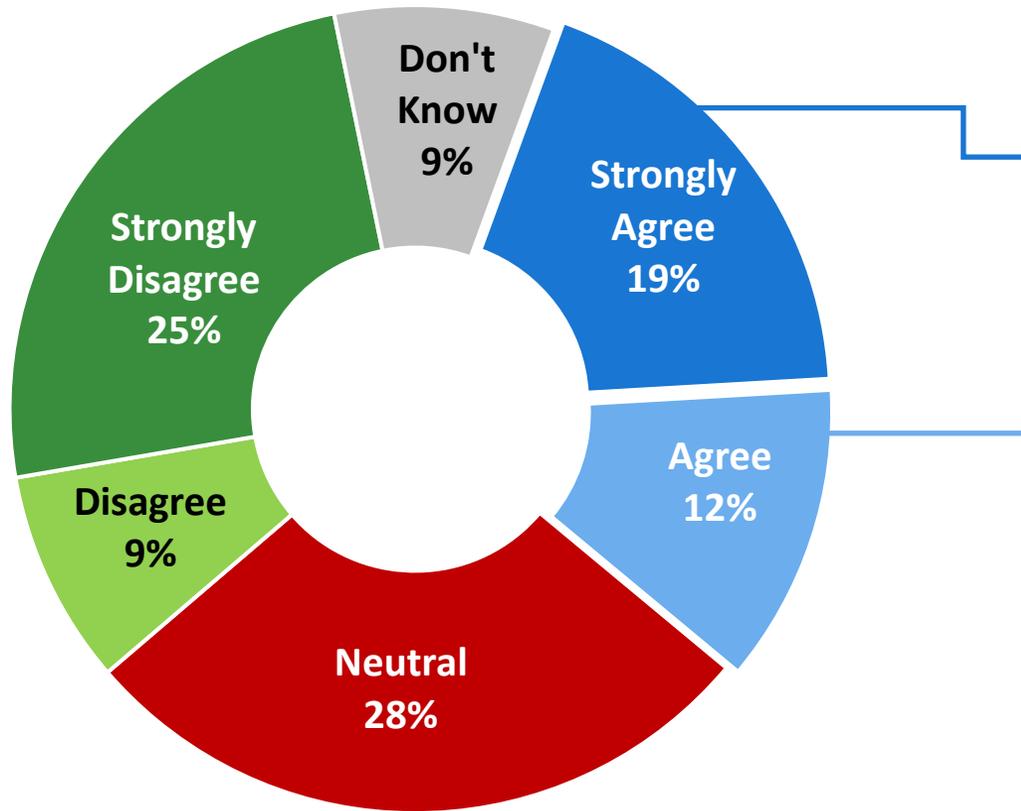


# The State of Social Media

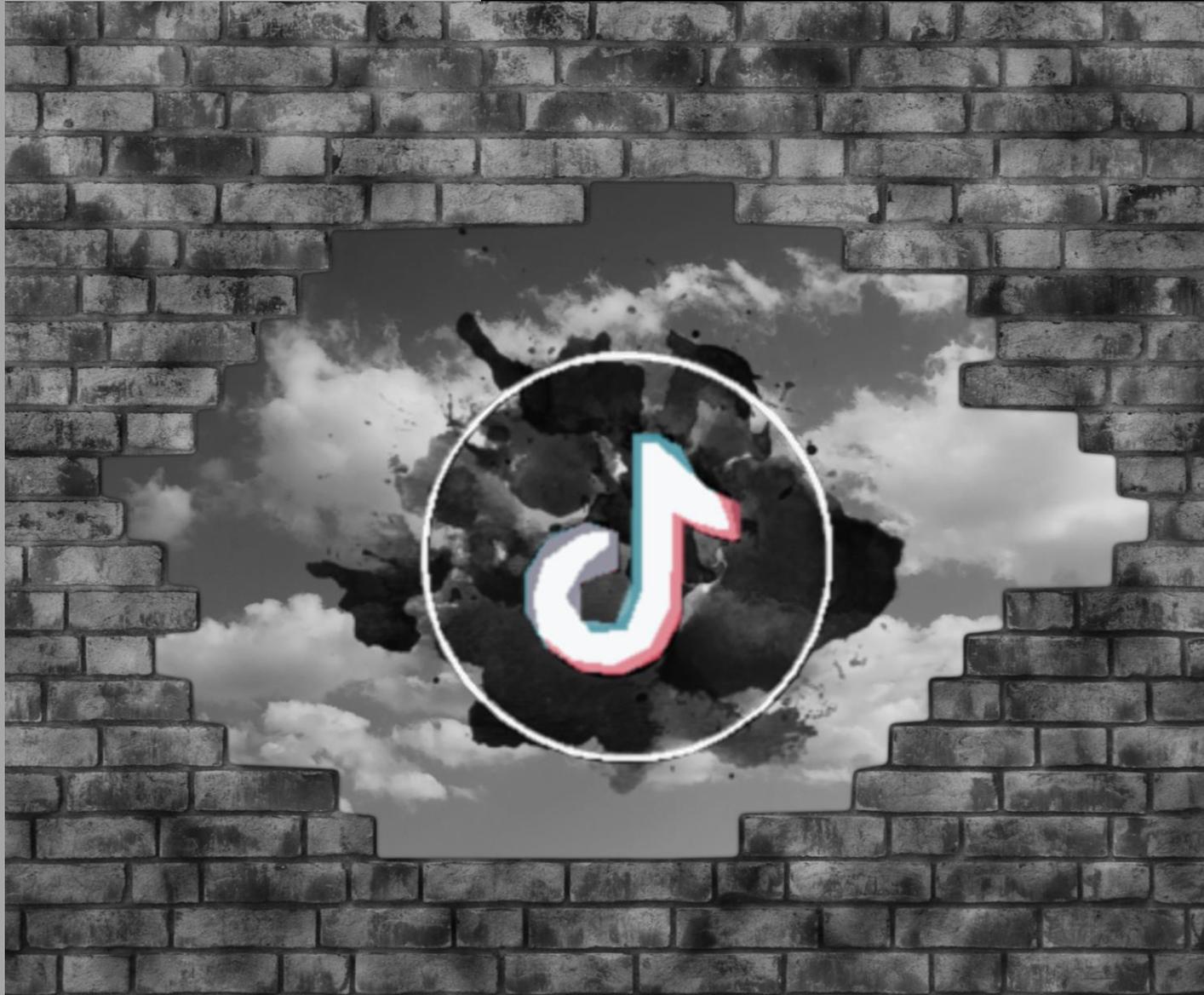


**Twitter's chaos may be having an effect on its popularity.**

# In General, Women and Younger Twitter Users Are Most Unhappy With Elon Musk as Owner

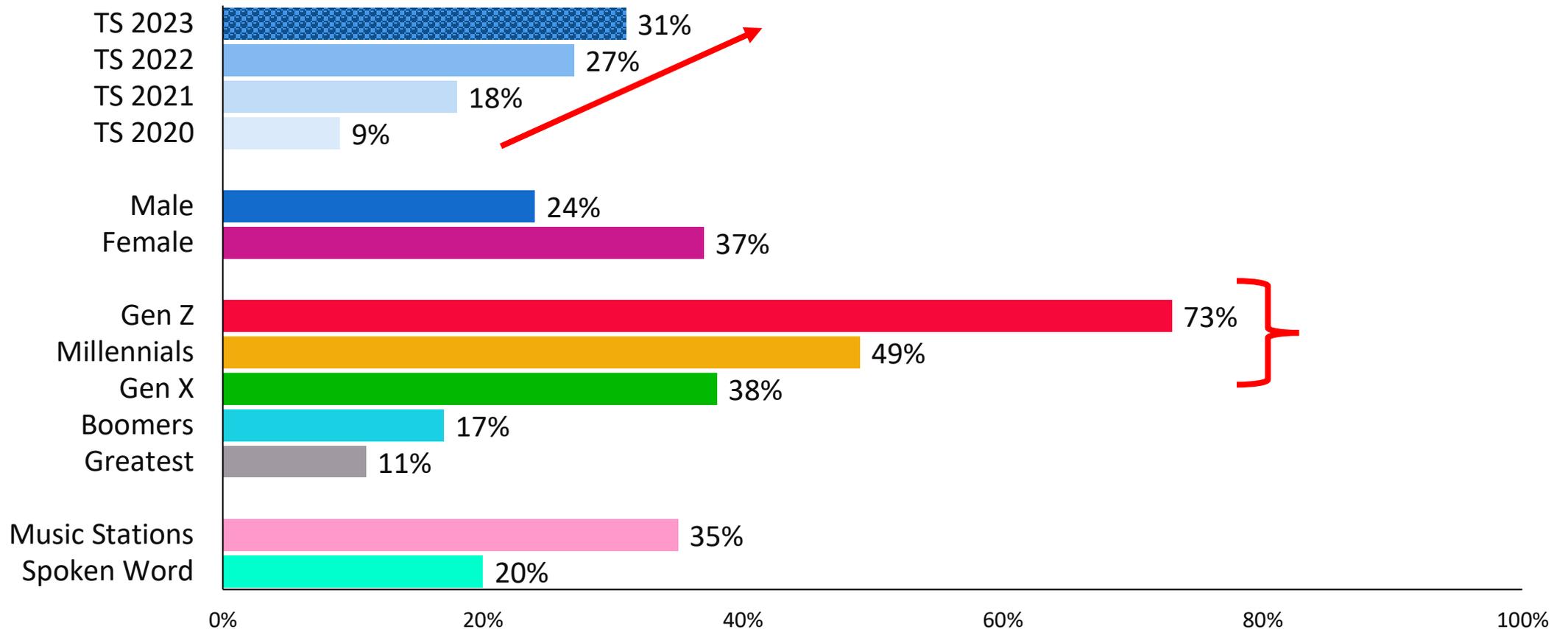


*"I'm unhappy with Twitter since Elon Musk bought the company"*



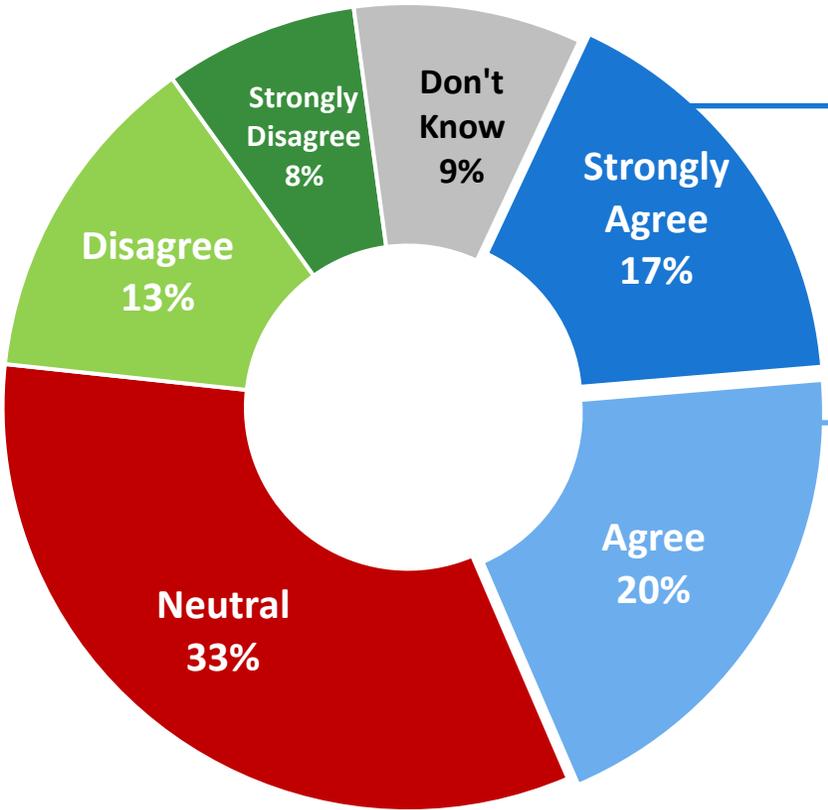
Even with an older sample, TikTok has made gains despite skepticism about being China-owned.

# TikTok Continues to Grow, Heavily Driven by Women, Younger Generations, Especially Gen Z

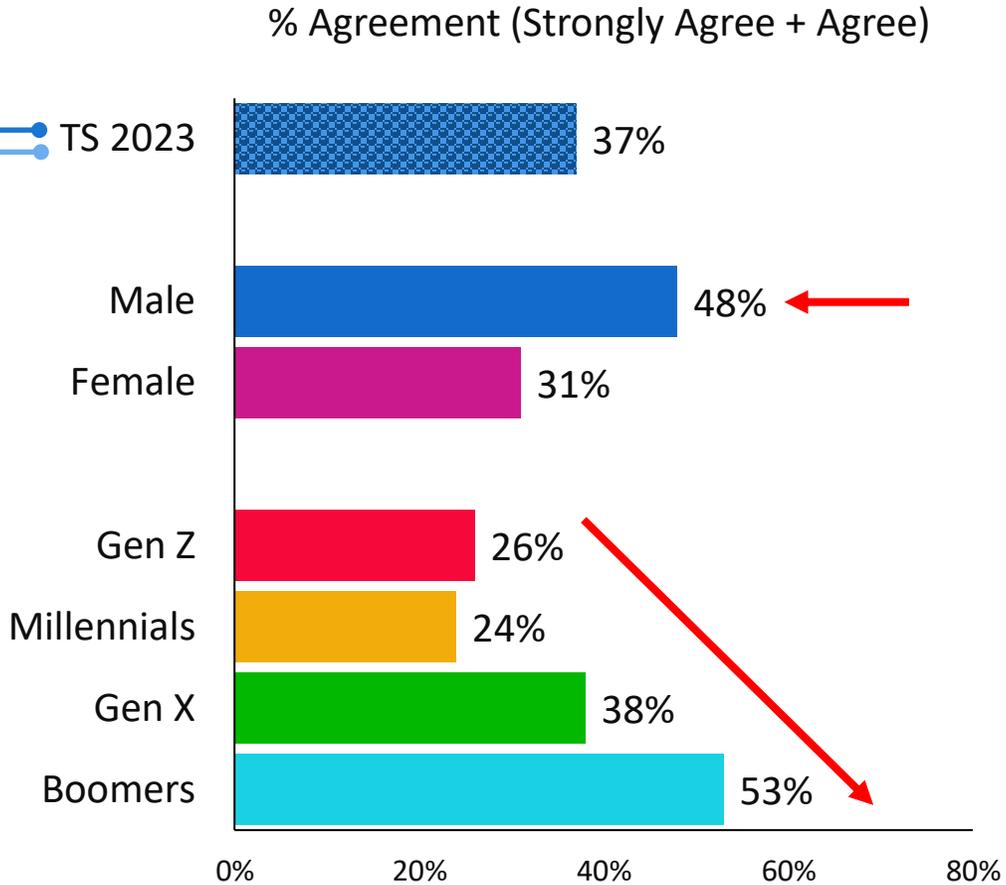


Among those with any social media profile, % who have a TikTok profile

# TikTok Users Express Concern About Its Chinese Ownership, Particularly Men and Baby Boomers



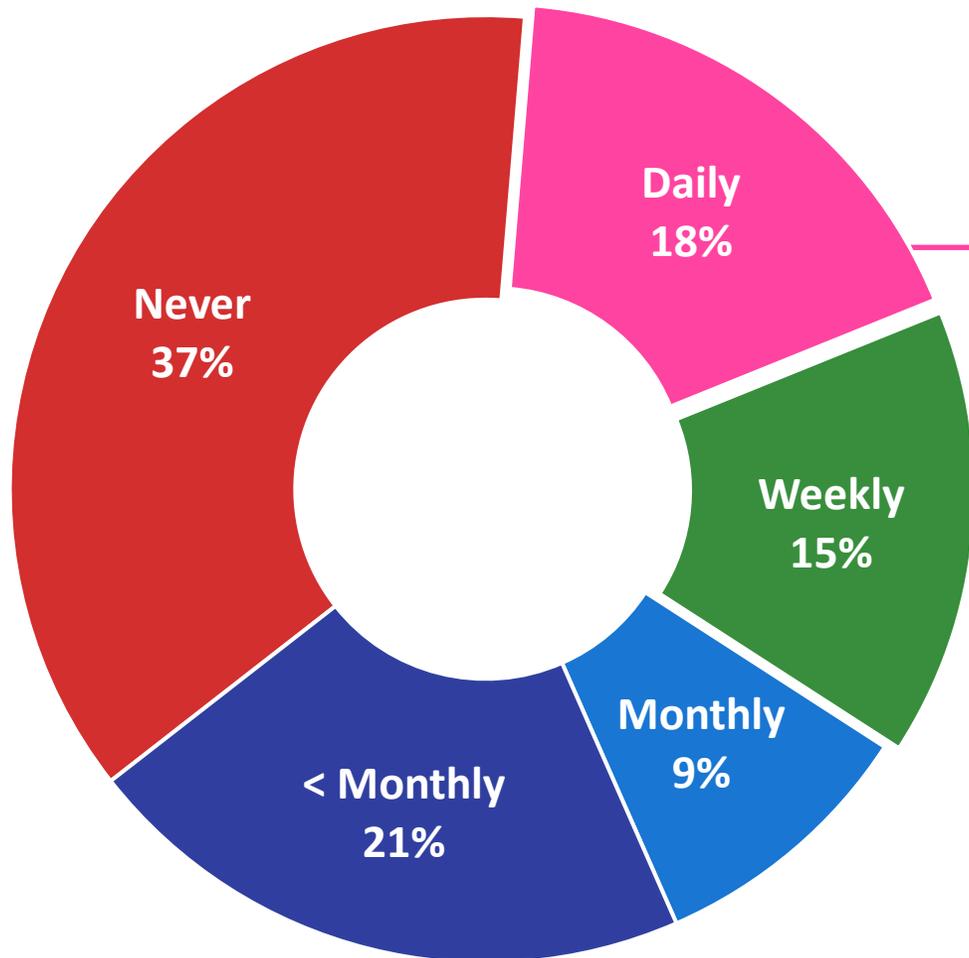
*"I have concerns about a Chinese company owning TikTok"*



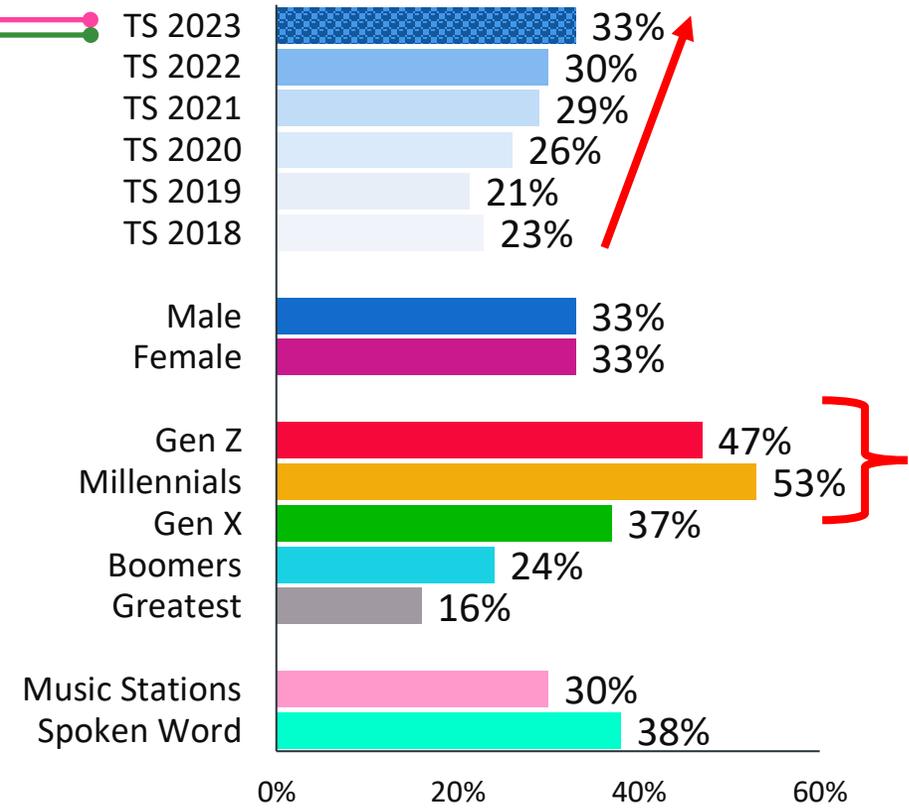


**Podcasting's  
reach is  
expanding while  
its momentum  
cools.**

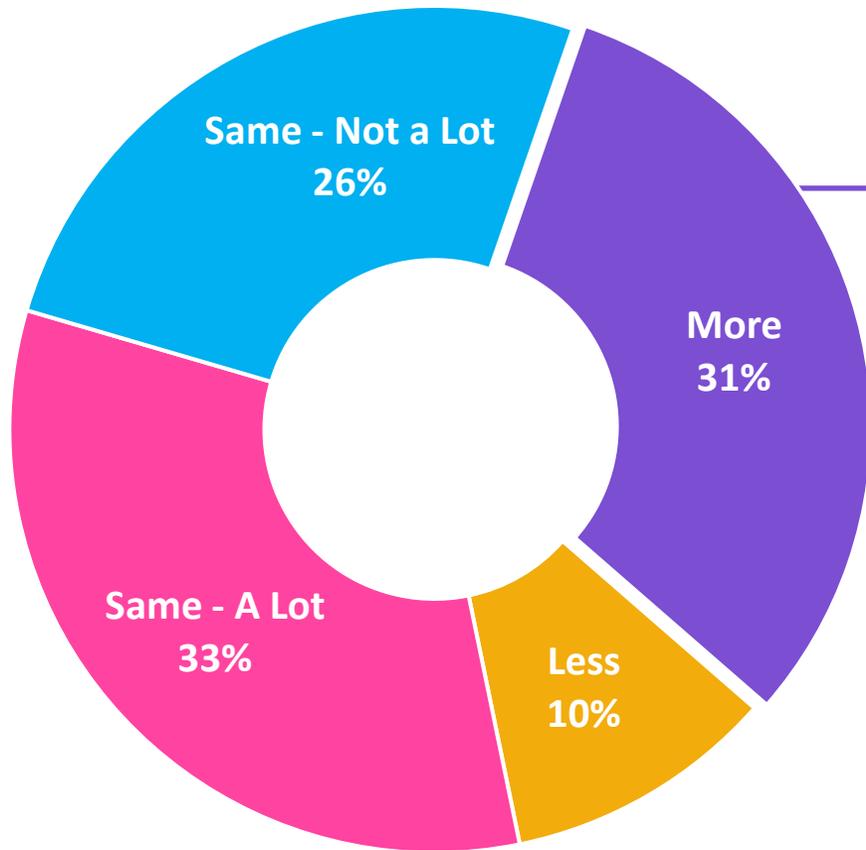
# Weekly Podcast Listening Hits an All-New High, Especially Younger Generations of Audio Consumers



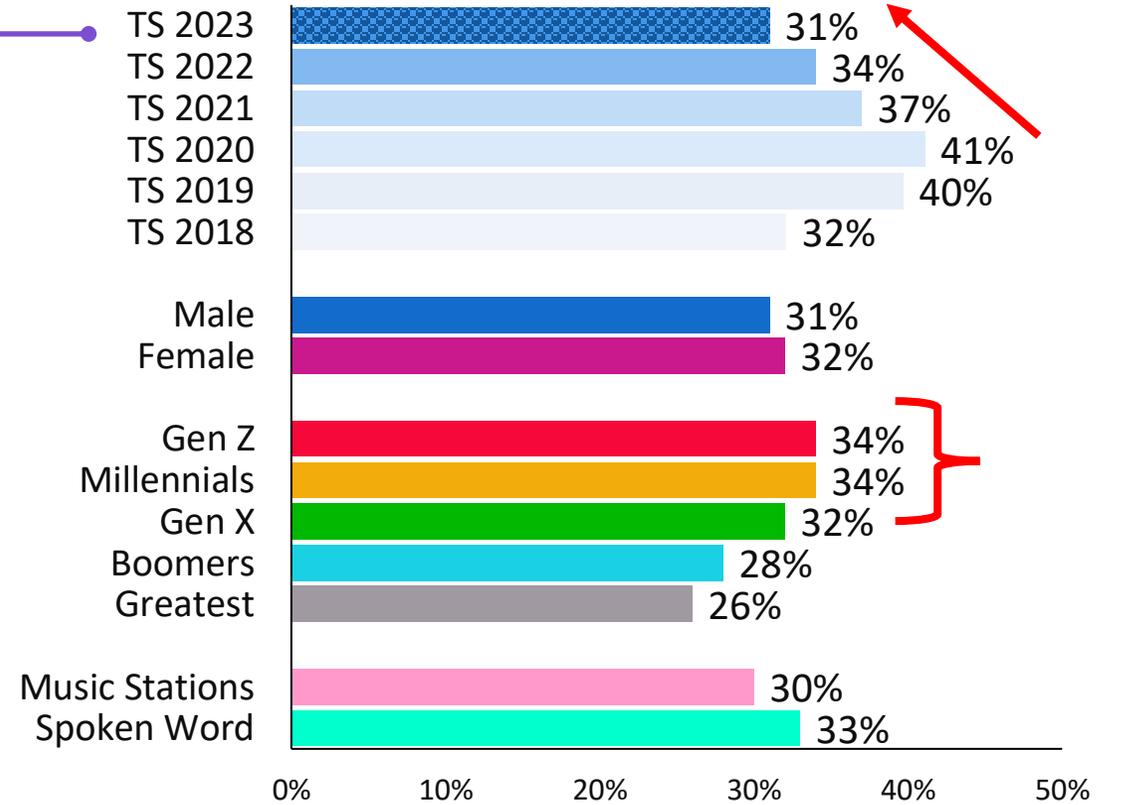
% Who Listen to Podcasts/  
On-Demand Audio Weekly or More



# But Momentum Continues to Slip as Podcasting's Overall Reach Grows



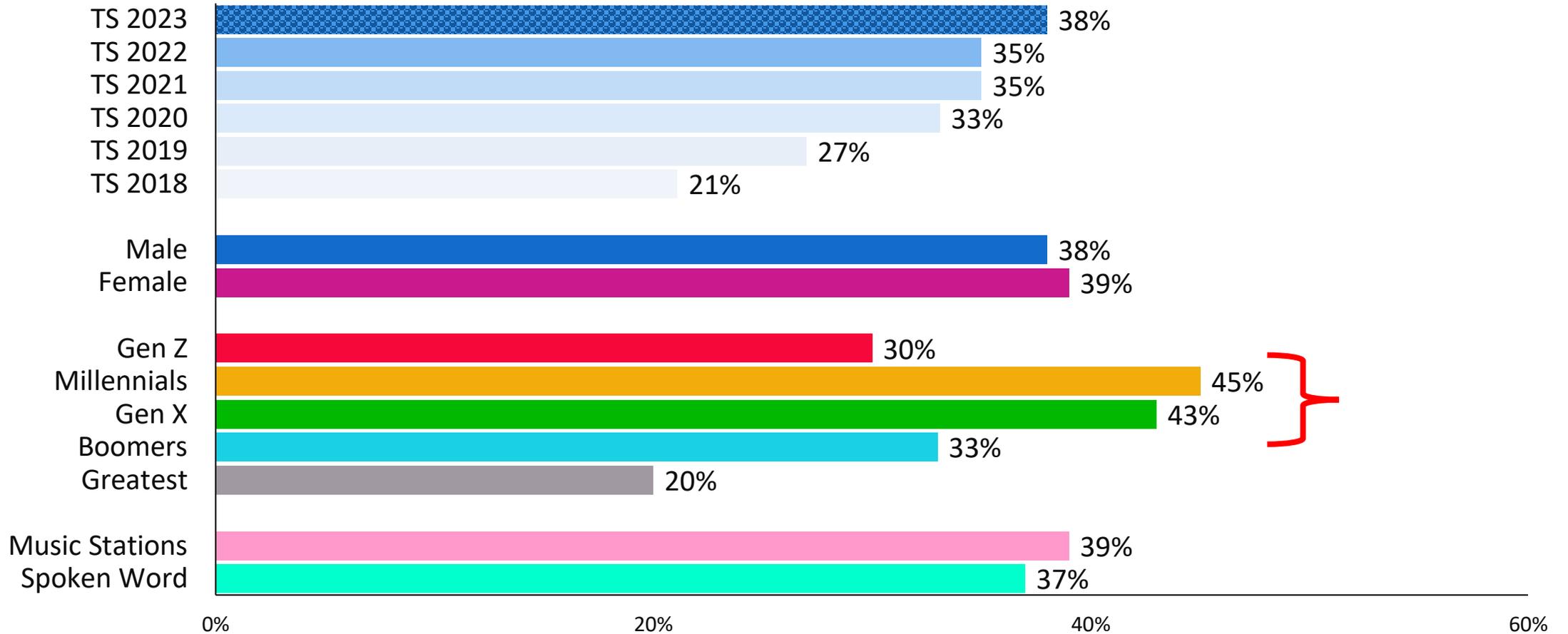
% of Weekly Podcast Listeners Who Say They Are Listening to Podcasts/On-Demand Audio More in the Past Year





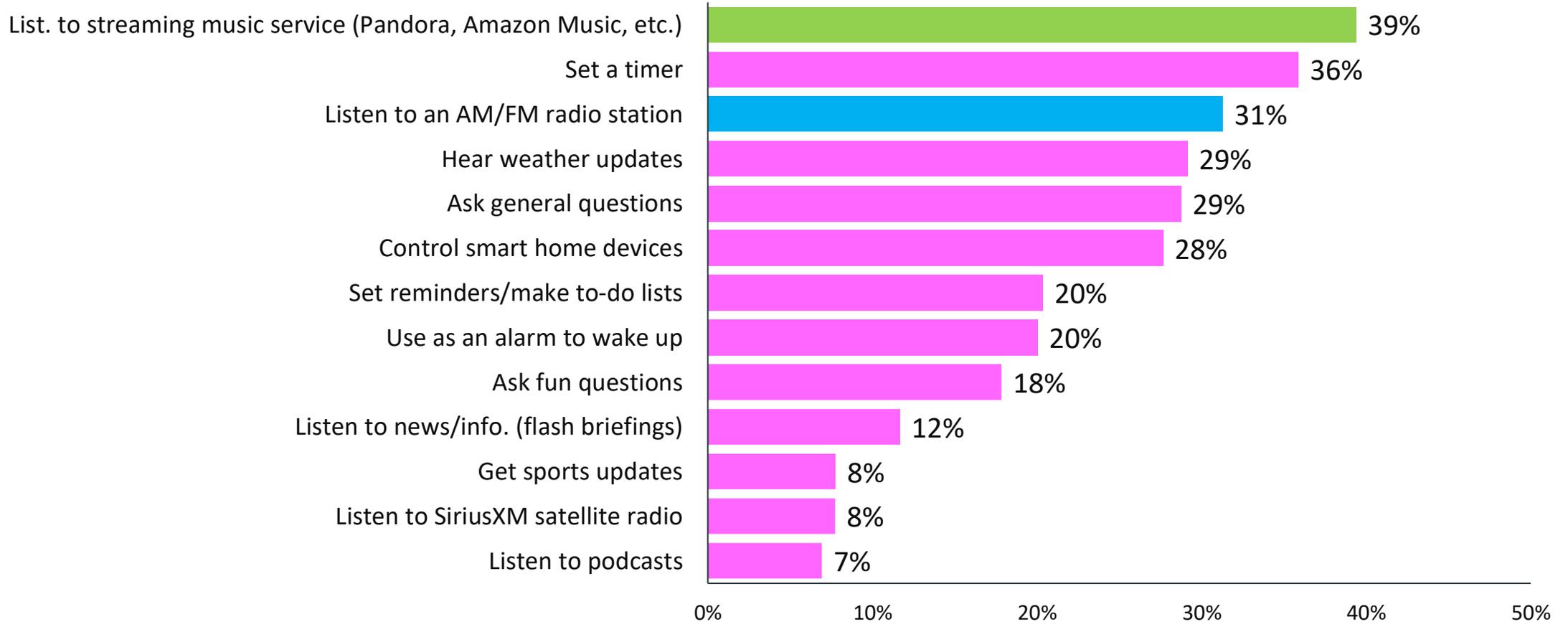
Smart speaker ownership is showing signs of life while current owners keep buying more of them.

# Smart Speaker Ownership Growth Resumes, Particularly Among Millennials and Gen Xers



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

# While Listening to Streamed Music Tops Smart Speaker Use Cases, Three in Ten Use These Devices to Stream AM/FM Radio

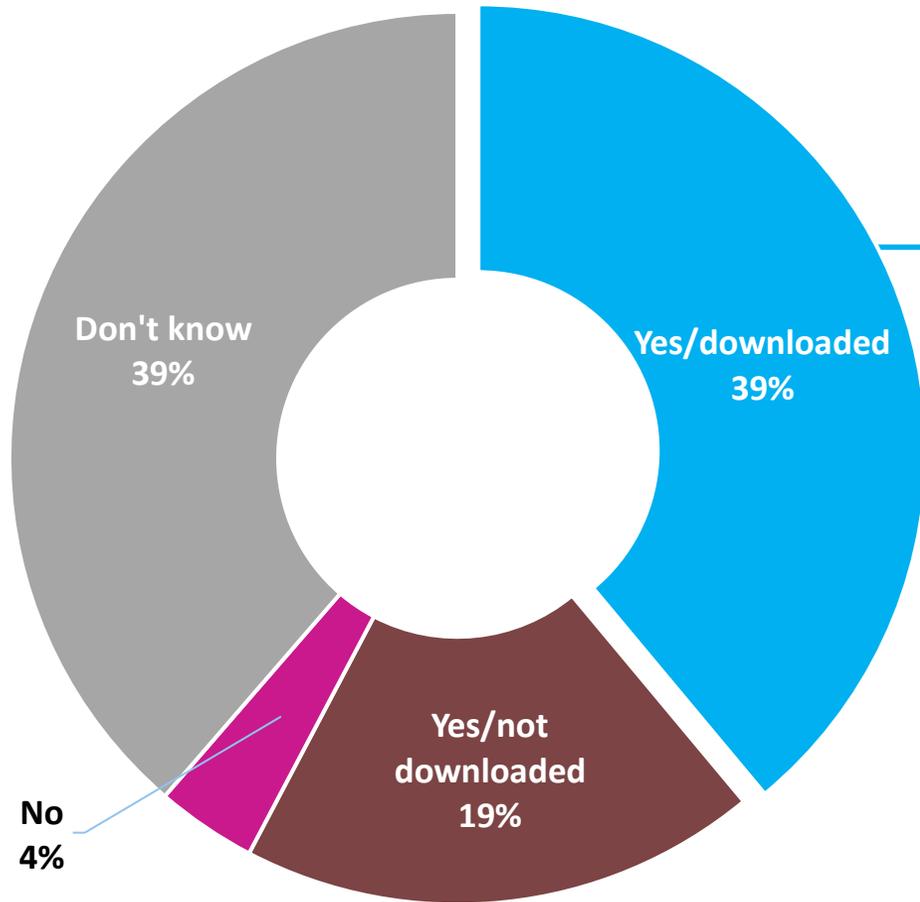


% of smart speaker owners who “frequently” use their device(s) in each way

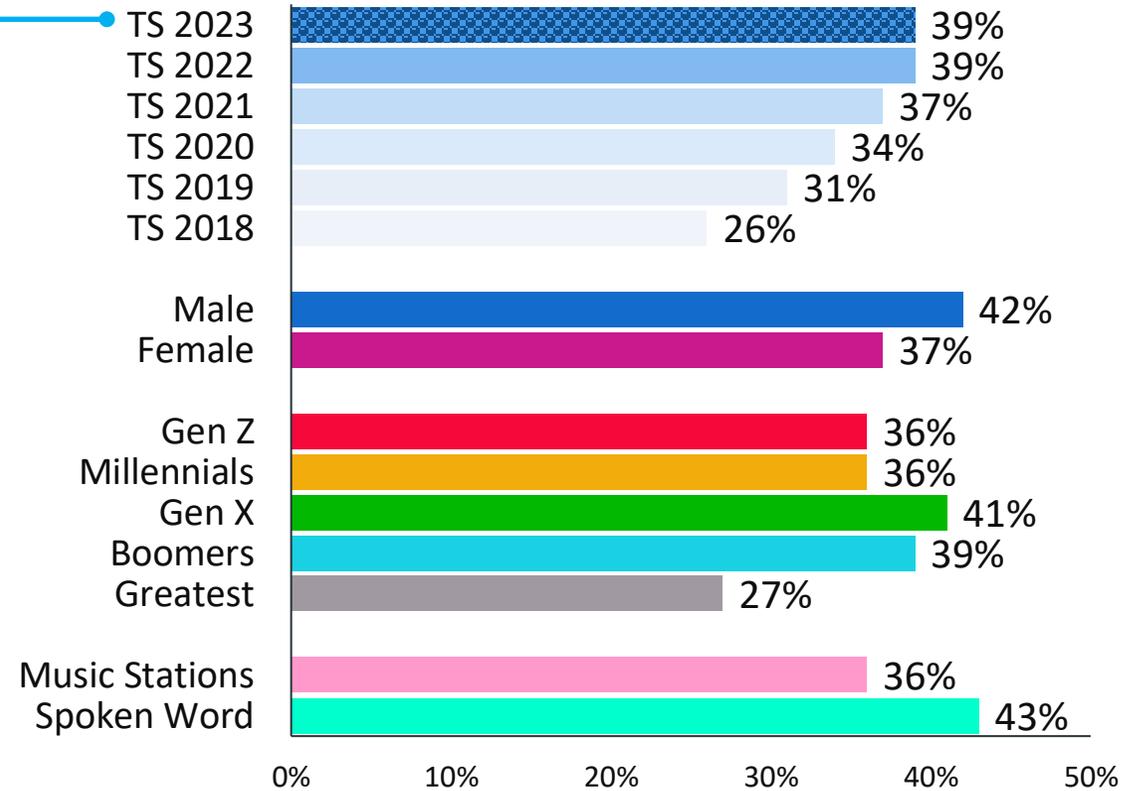


Mobile devices and apps continue to play a key role in streaming audio usage.

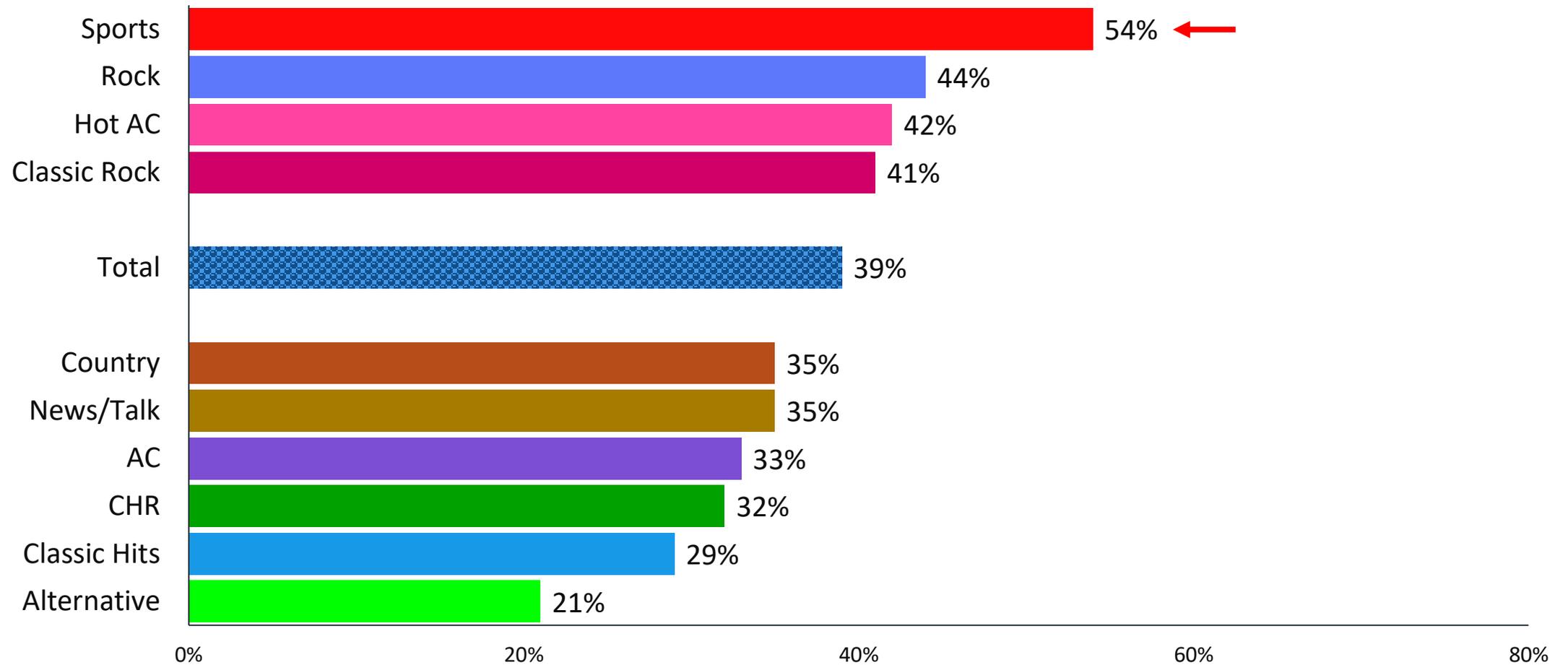
# P1 Station App Downloads Have Stalled at About Four in Ten; Led By Men and Spoken Word Stations



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

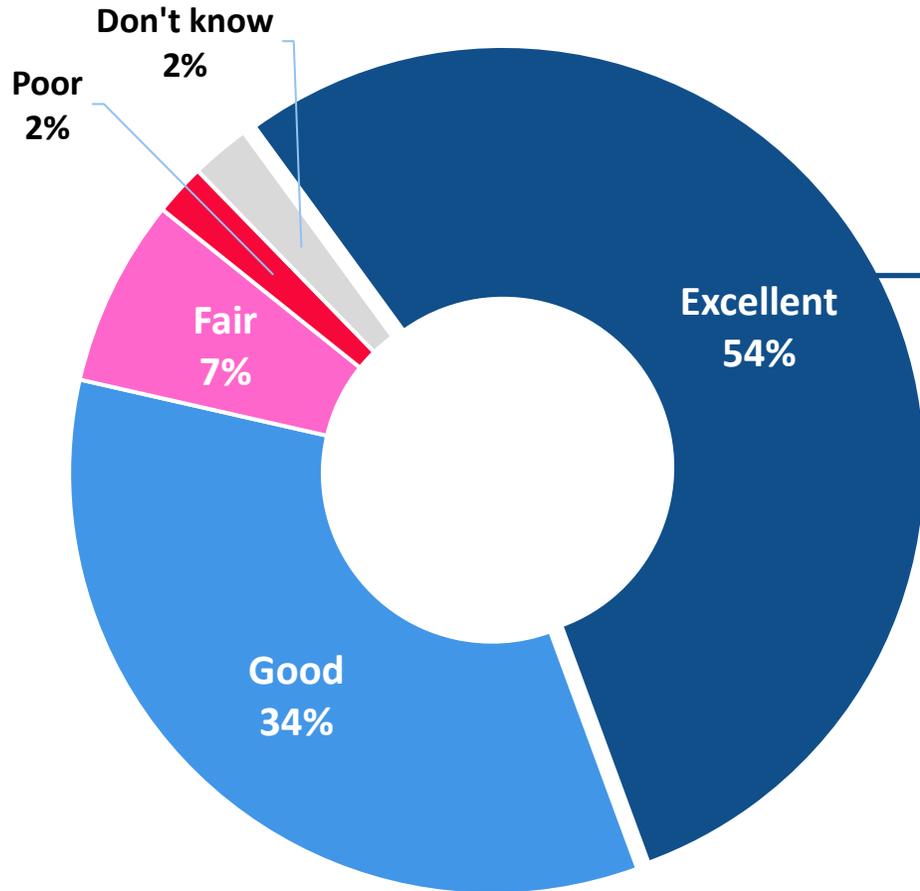


# Sports Radio Fans Are Especially Likely to Have Downloaded Their P1 Station's App



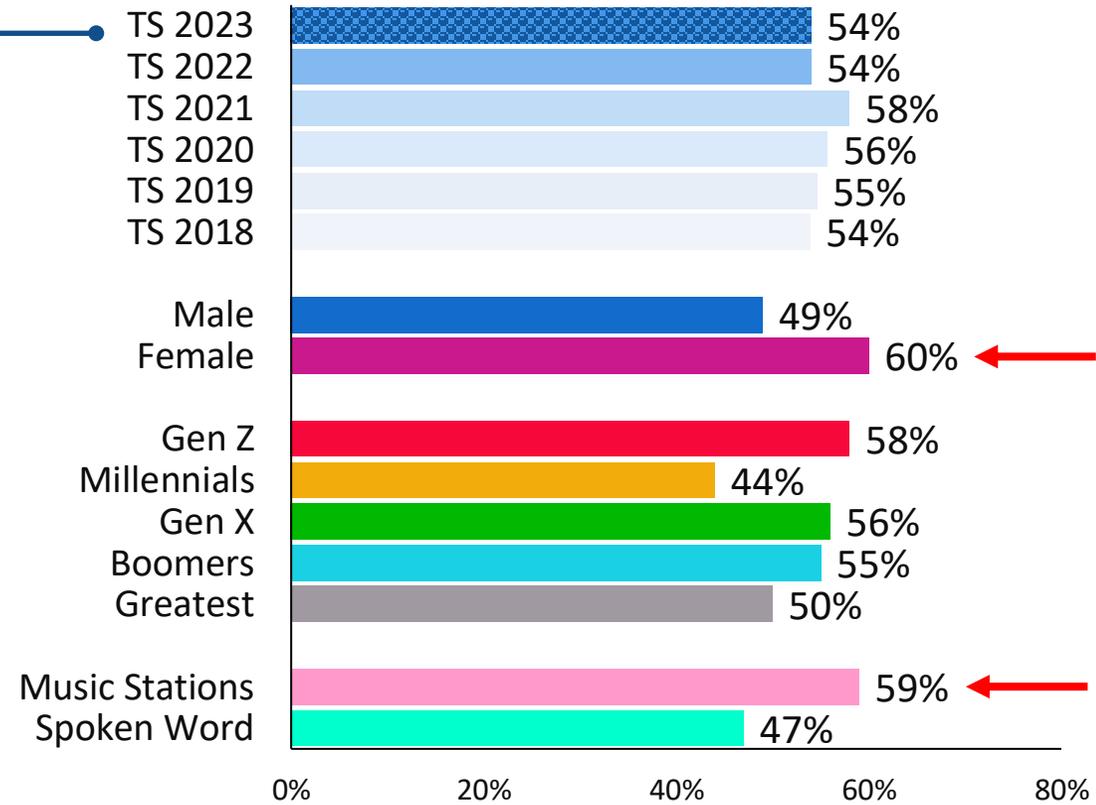
% by format, of smartphone/tablet owners who have downloaded P1 station app

# Most Who Have Downloaded Their P1 Station's App Rate It "Excellent," With Women and Music Radio Fans in Front



"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

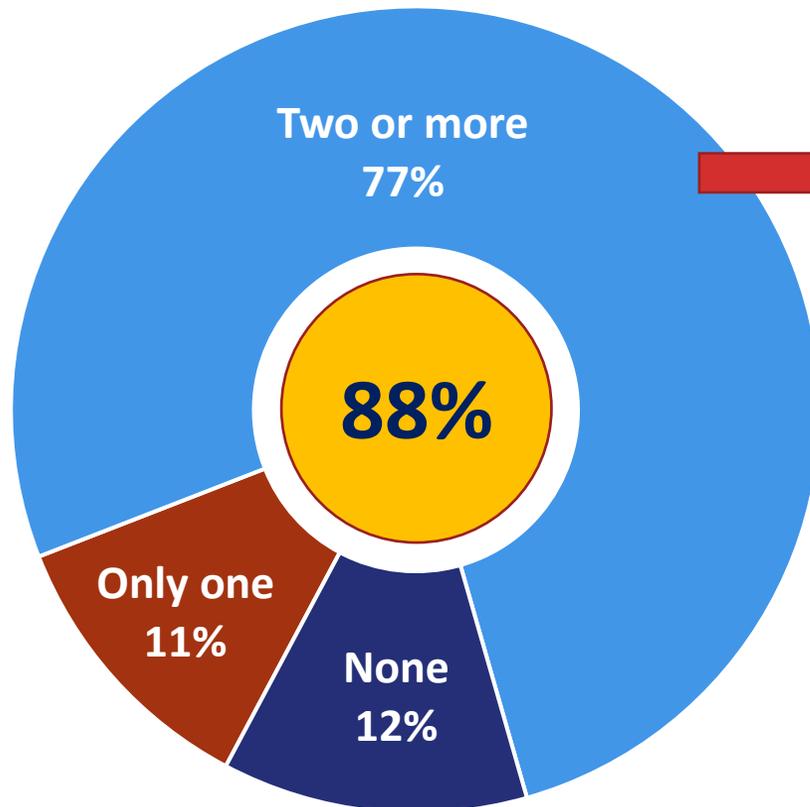


Paid  
Content

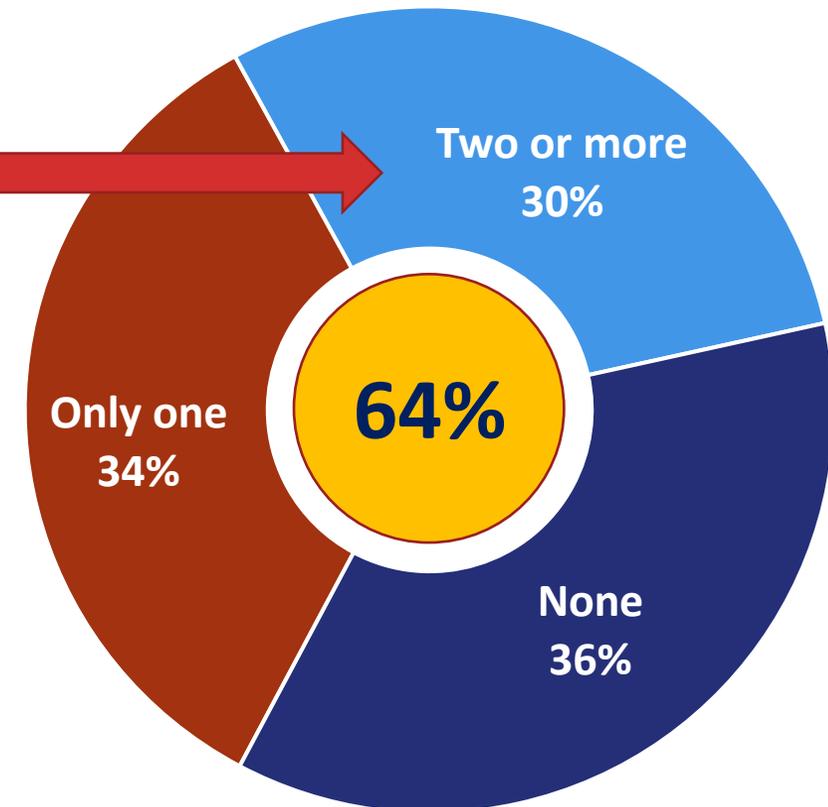
We have not reached “peak subscription”...yet, but consumers are reacting to the fees.

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

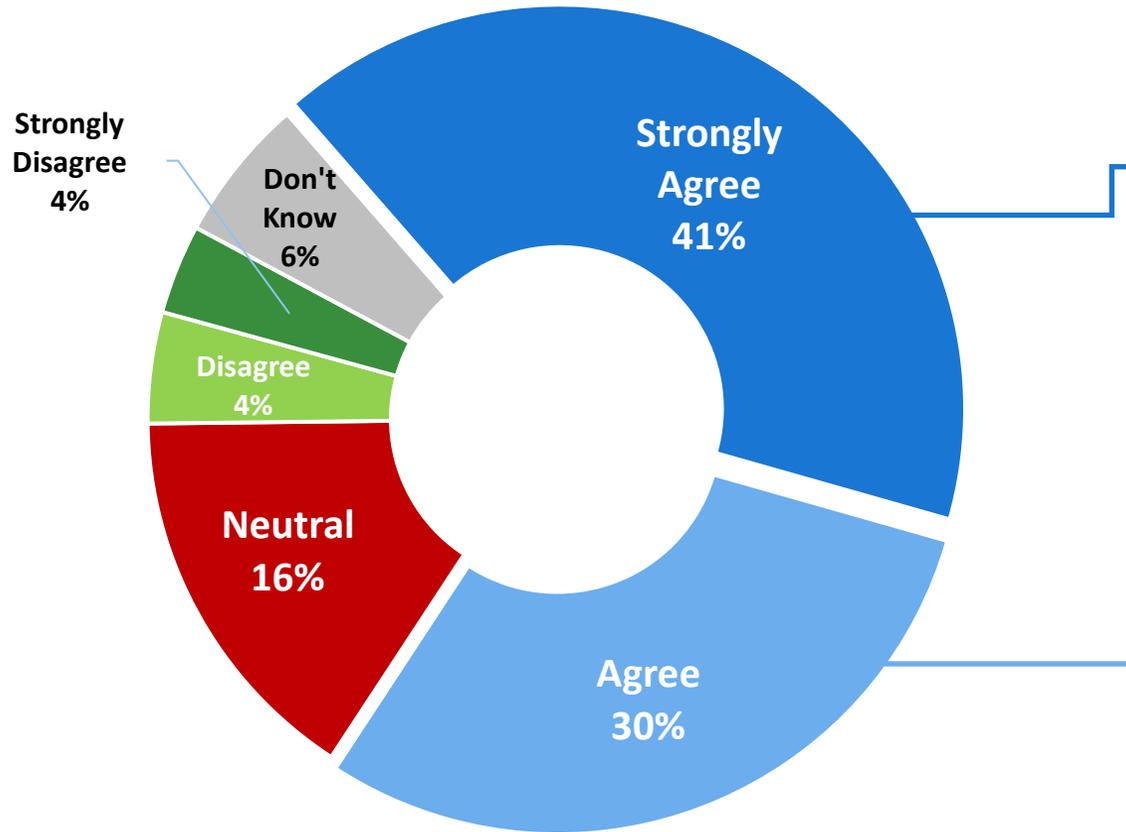
Paid **VIDEO** Streaming Subscriptions



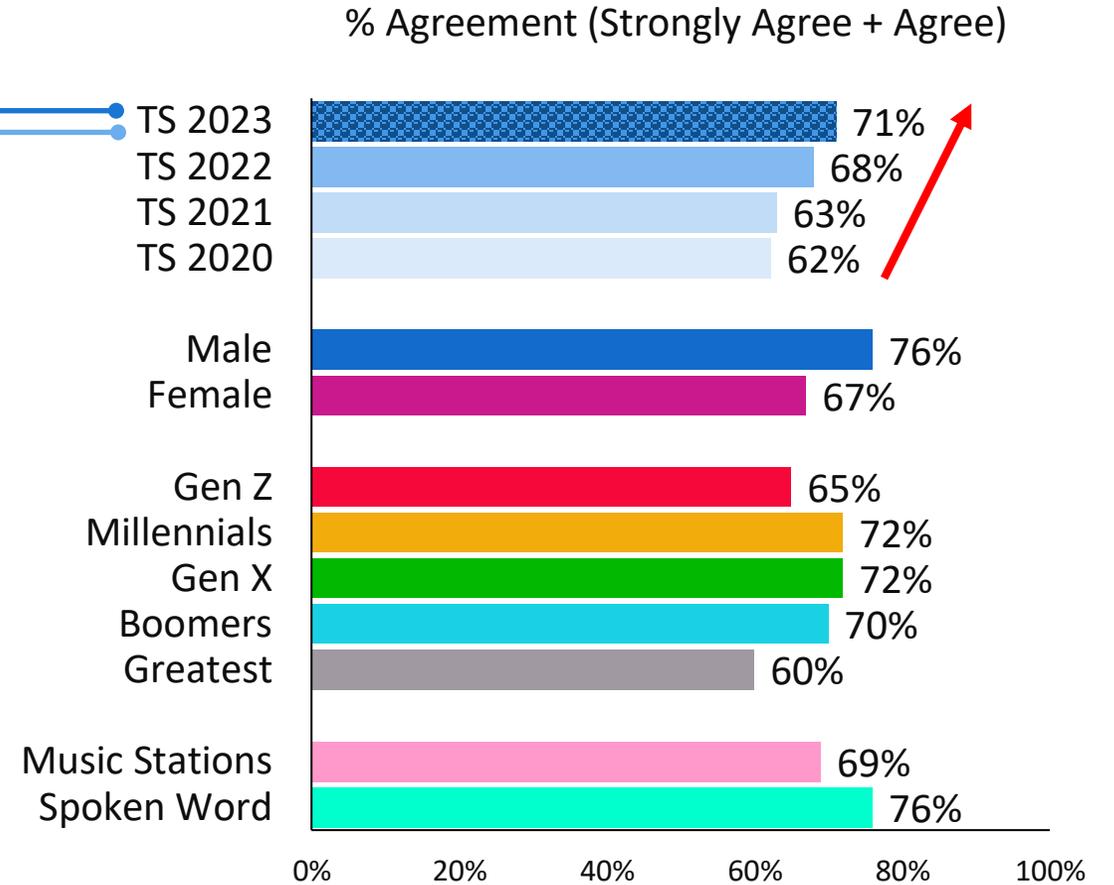
Paid **AUDIO** Streaming Subscriptions



# Seven in Ten Now Say Subscription Fees for Audio/Video Content Are a Growing Concern



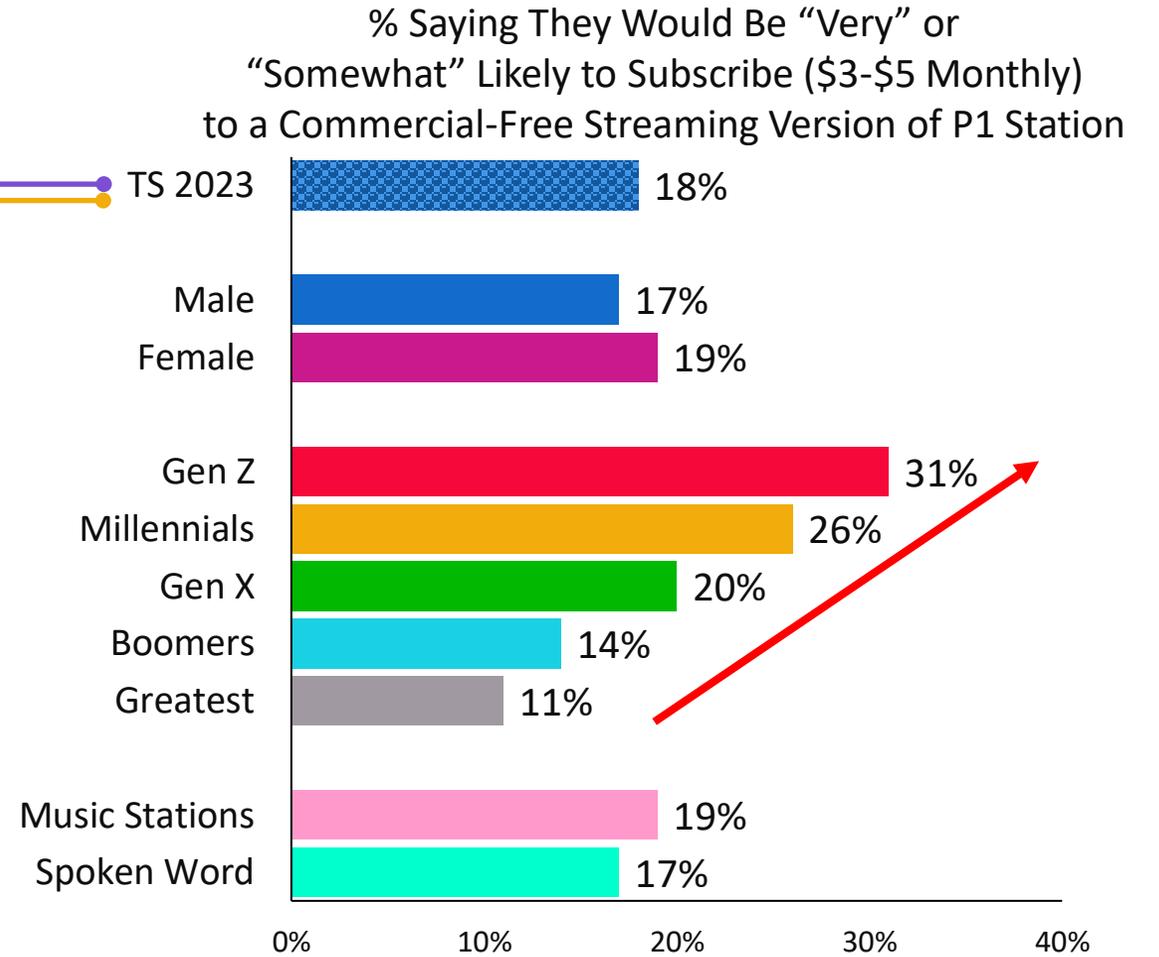
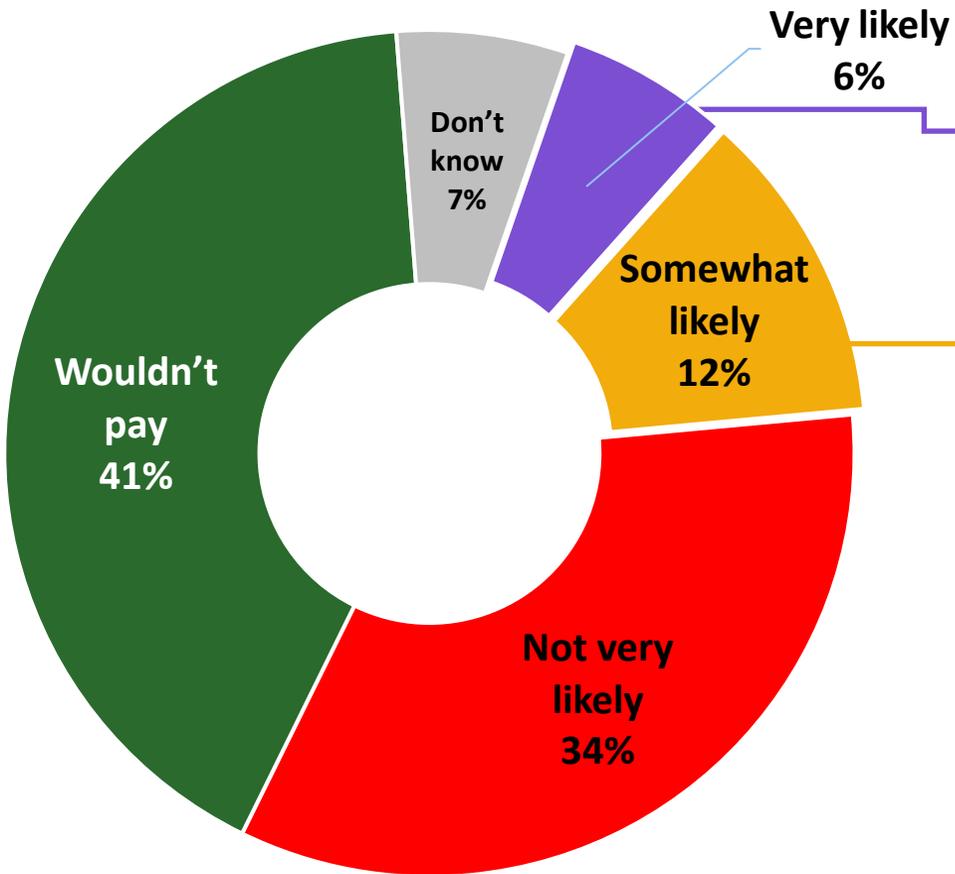
*"I am concerned about the growing number of subscription fees I'm paying for media content"*



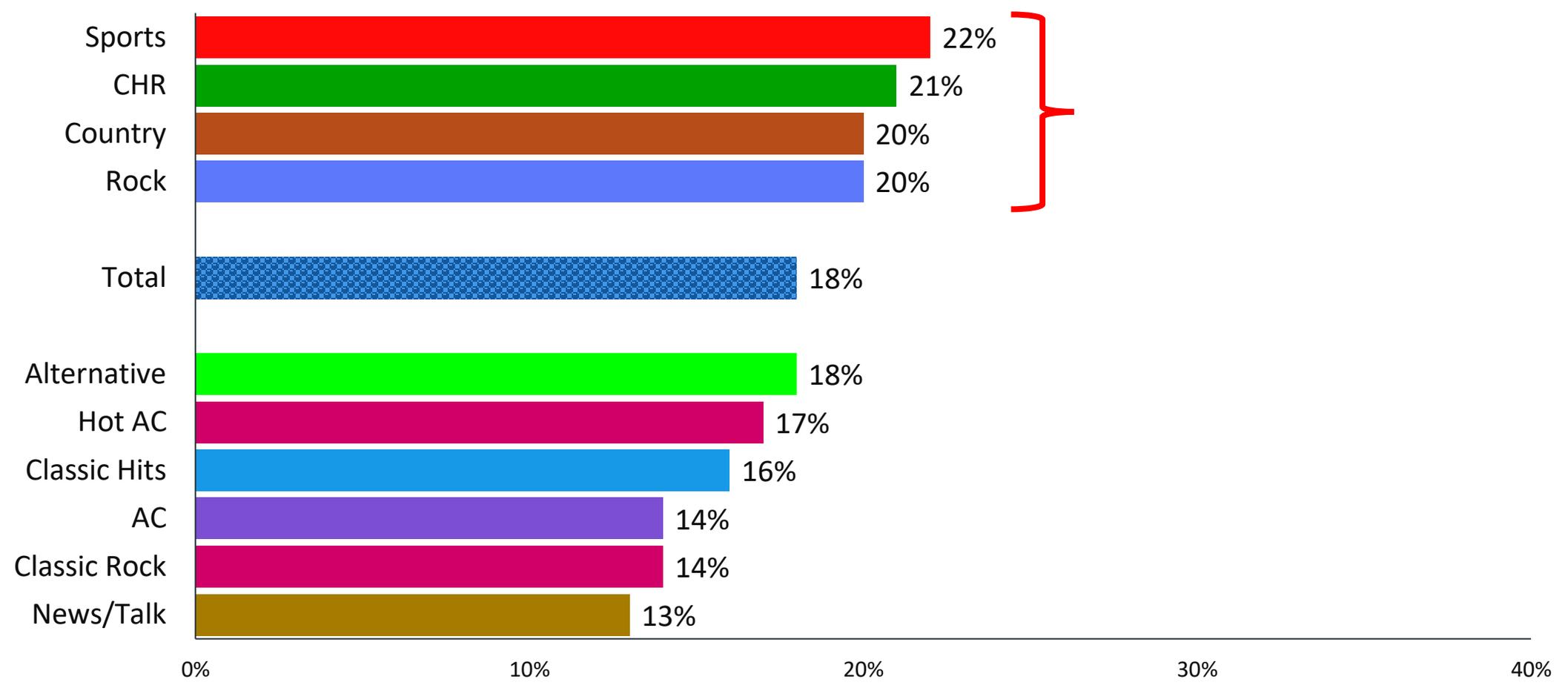
# Is There Viable Interest in a Commercial-Free Streaming Version of a Favorite Radio Station?

***“Suppose THE STATION THAT SENT YOU THIS SURVEY offered a COMMERCIAL-FREE version of the station available as an online stream (via mobile app, computer, laptop, etc.) – how likely would you be to pay a small monthly subscription fee (\$3 to \$5 monthly) to access this service?”***

# Almost One in Five Says They Might Subscribe to a Commercial-Free Streaming Version of Their P1 Station



# Sports, CHR, Country and Rock Radio Fans Are Most Apt to Show Interest in Paying for a Commercial-Free Streaming Version of Their P1 Station

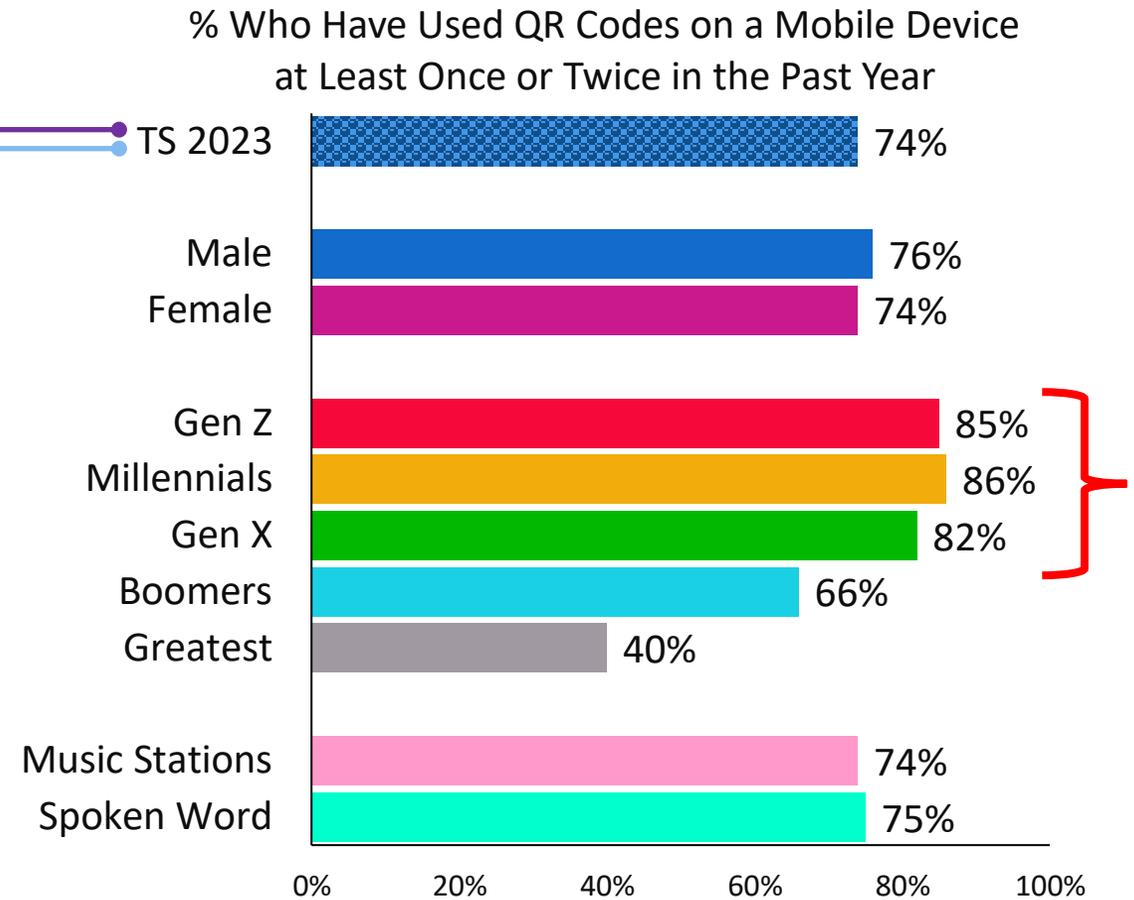
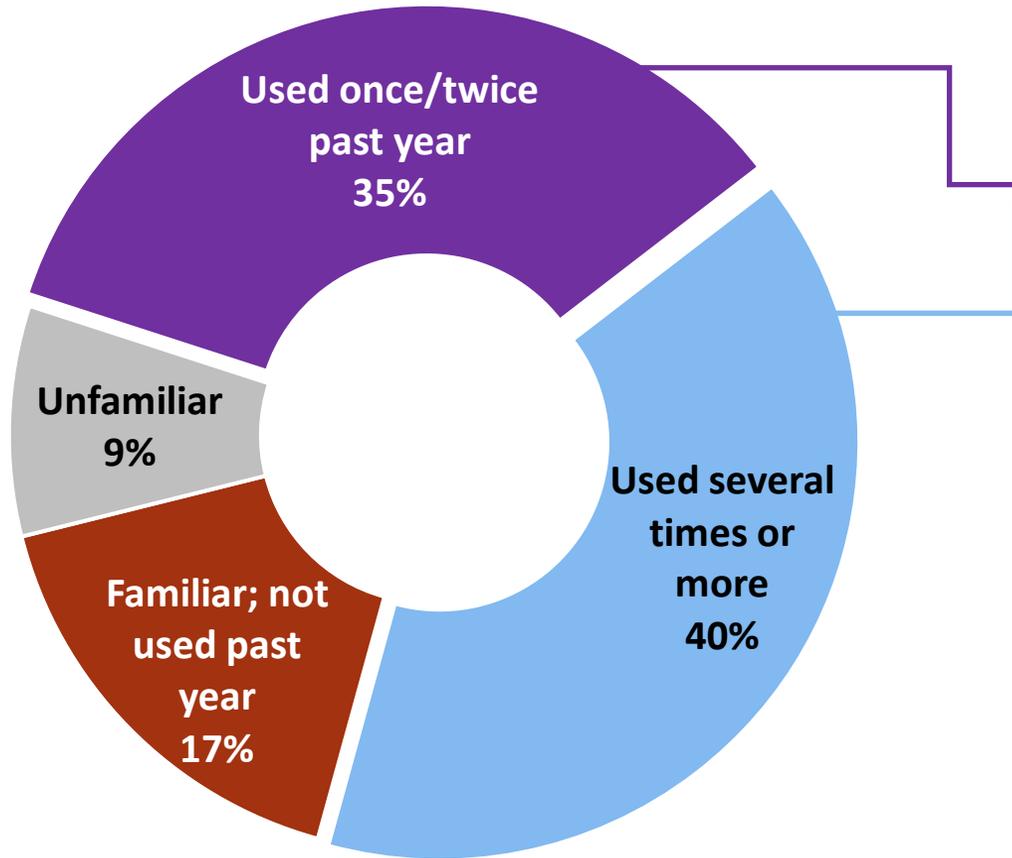


% by format, saying they would be “very” or “somewhat” likely to subscribe (\$3-\$5 monthly) to a commercial-free streaming version of P1 station



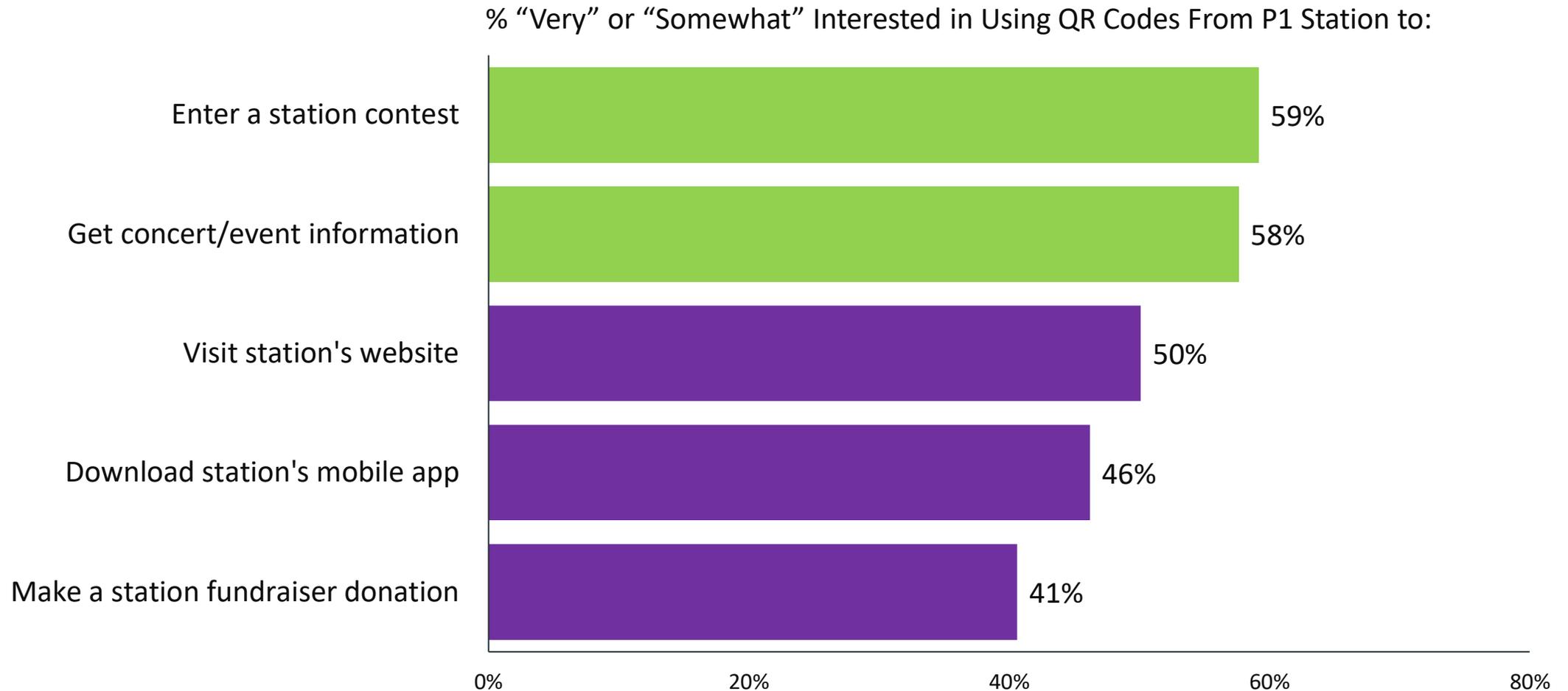
**The vast majority use QR codes – is it an avenue for attention, content and contests?**

# Nearly Three in Four Use QR Codes on a Mobile Device in the Past Year



*“In the past year, have you used a QR code on a mobile device?”*

# QR Code Users Are Most Interested in Using Them to Enter a Station Contest and Get Concert/Event Information



Among those who have used QR codes at least once or twice in the past year

# Contact Us

- [www.jacobsmedia.com](http://www.jacobsmedia.com)
- [www.jacapps.com](http://www.jacapps.com)
- [fred@jacobsmedia.com](mailto:fred@jacobsmedia.com)
- [@fnjacobs](https://twitter.com/fnjacobs)
- [@jacobsmedia](https://twitter.com/jacobsmedia)
- [www.jacobsmedia.com/blog](http://www.jacobsmedia.com/blog)



Jacobs  
media strategies

Executive Summary

jacobs media  
techsurvey  
2023



# Radio in the Post-Pandemic Era

