



INSIDERADIO

Jacobs
media strategies

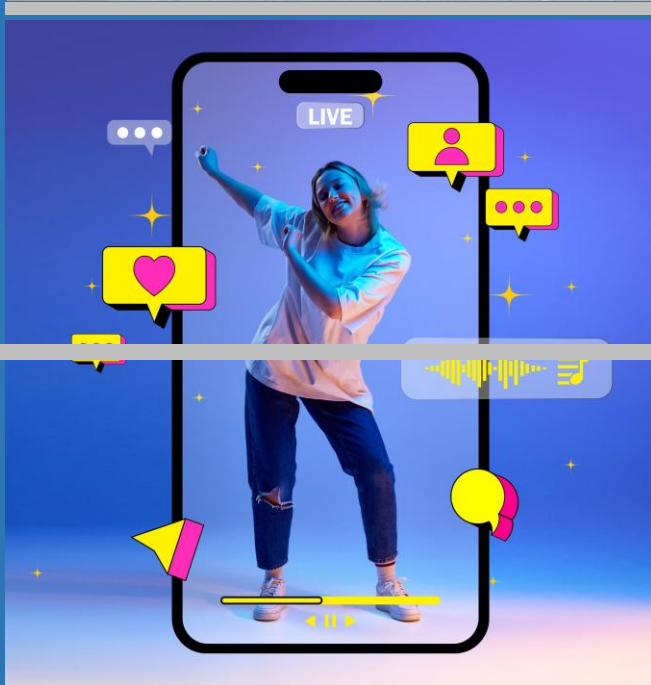
Industry Webinar

techsurvey
2025

10 Key Takeaways

Quu®

© Jacobs Media 2025



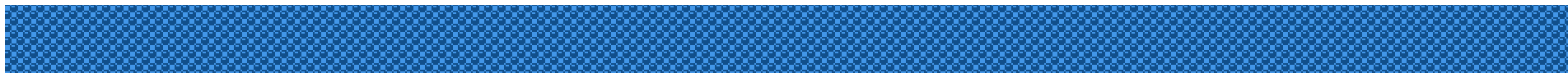
Methodology

- 500 commercial radio stations in the U.S. & Canada
- N = 24,525
- Interview dates: January 8 - February 9, 2025
- 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 2024 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



TS 2025



AC



CHR



Classic Rock



Classic Hits



Country



News/Talk

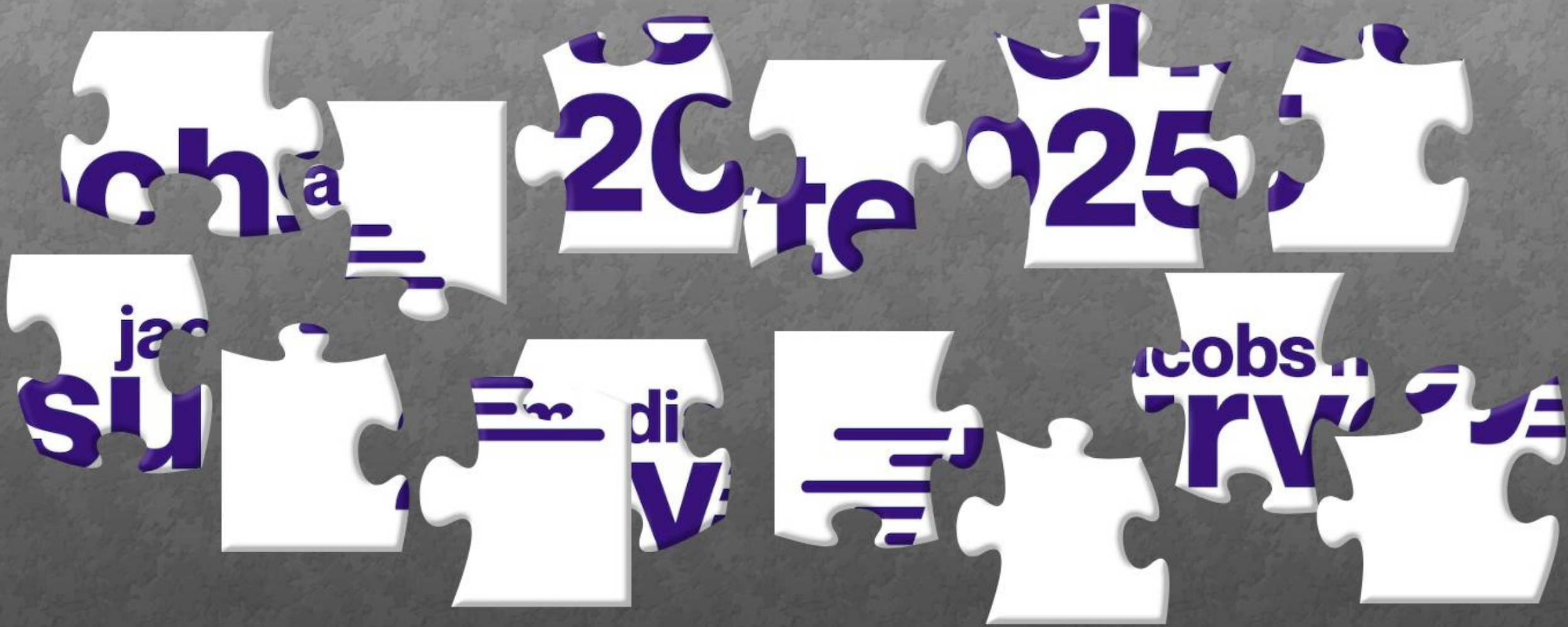


Rock



Sports





10 Key Takeaways

10 Key Takeaways

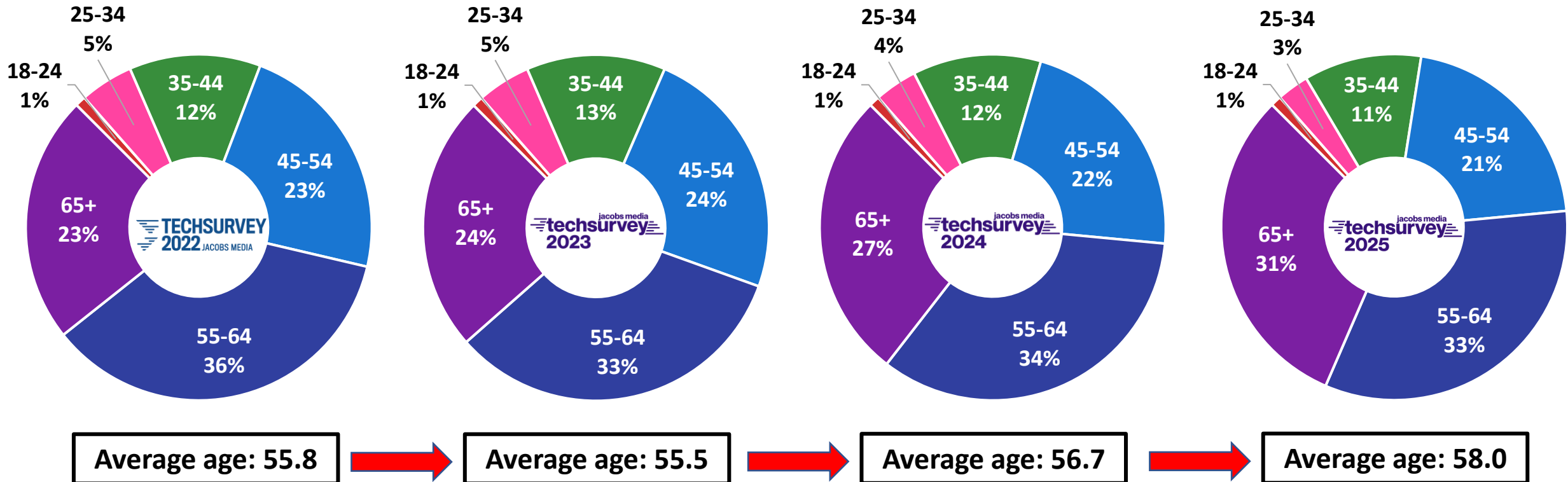
1. Broadcast radio is treading water. It continues to age, and while some vital signs are stable, others show erosion.
2. “Being local” is a perceived asset and not just a slogan. It has grown since the pandemic.
3. For the seventh consecutive year, personalities overshadow music as a main driver of broadcast radio listening.
4. Why are one in ten listening less? A combination of digital choice, COVID lag, and “unforced errors” with programming content.
5. The digital transformation rolls on, but it has slowed down and become more incremental.
6. It’s still about “meeting the audience where they are.” New paths include newsletters, smart TVs, and short videos.
7. The better equipped the vehicle with dashboard technology, the more radio listening in the car is being challenged by digital and satellite content.
8. Mobile is like media’s “connective tissue” – all roads lead to mobile.
9. Social media’s impact has grown due to its growing role as a news source and for driving influencer-inspired purchases.
10. Podcasting reaches an all-new high in weekly listenership, a sign it is fast becoming a mainstream medium.

11. BONUS: Is there a Gen X opportunity for Boomer-skewing formats?

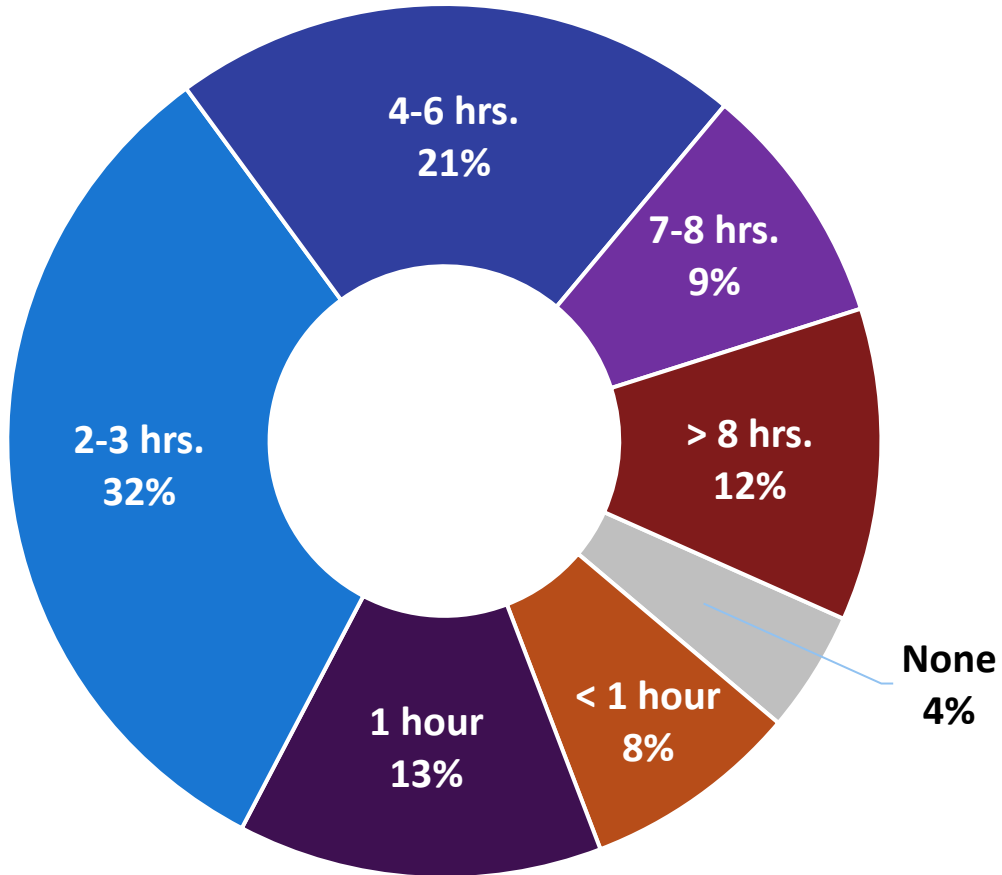


Radio is holding its own...or treading water. TS2025 illustrates radio's unique strengths but also how it's aging and why it's losing fans. The vital signs are hanging in, but there's erosion.

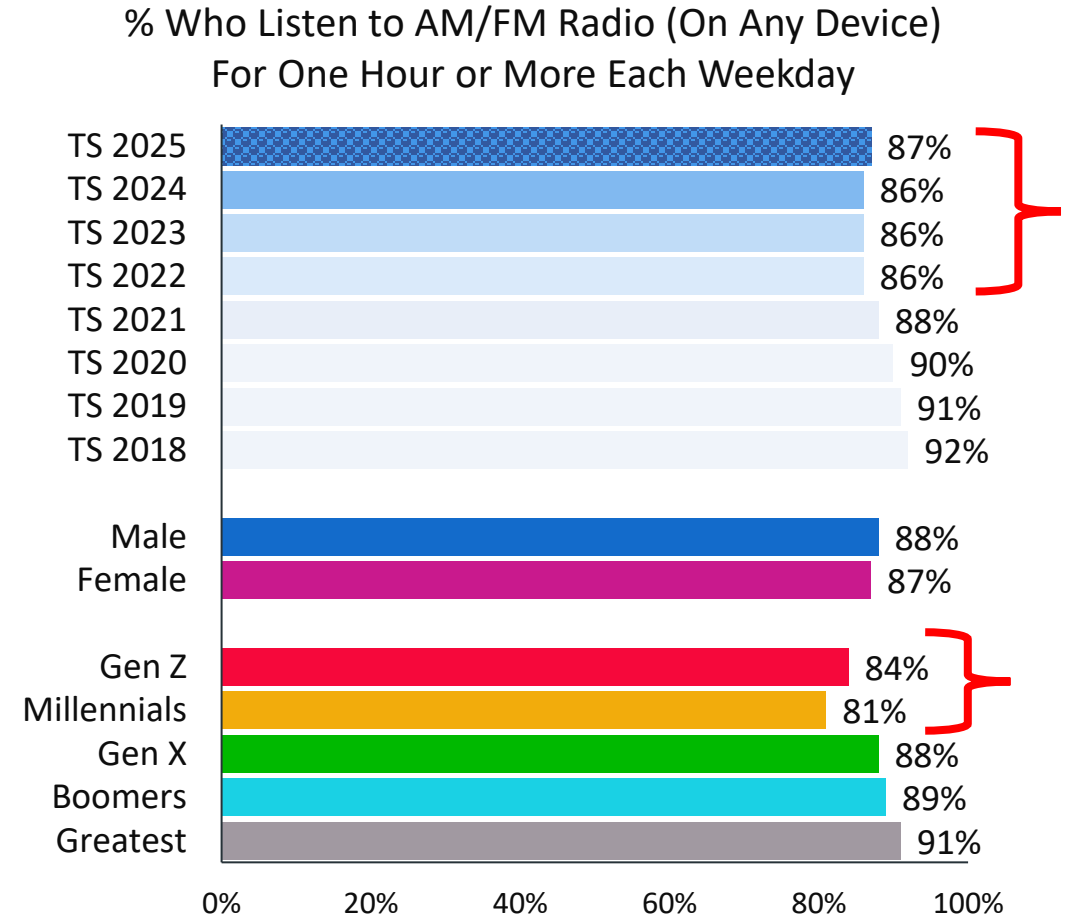
Like Radio, Techsurvey Continues to Age, As the Average Respondent Is Now Four Years Older Than the 25-54 Demo



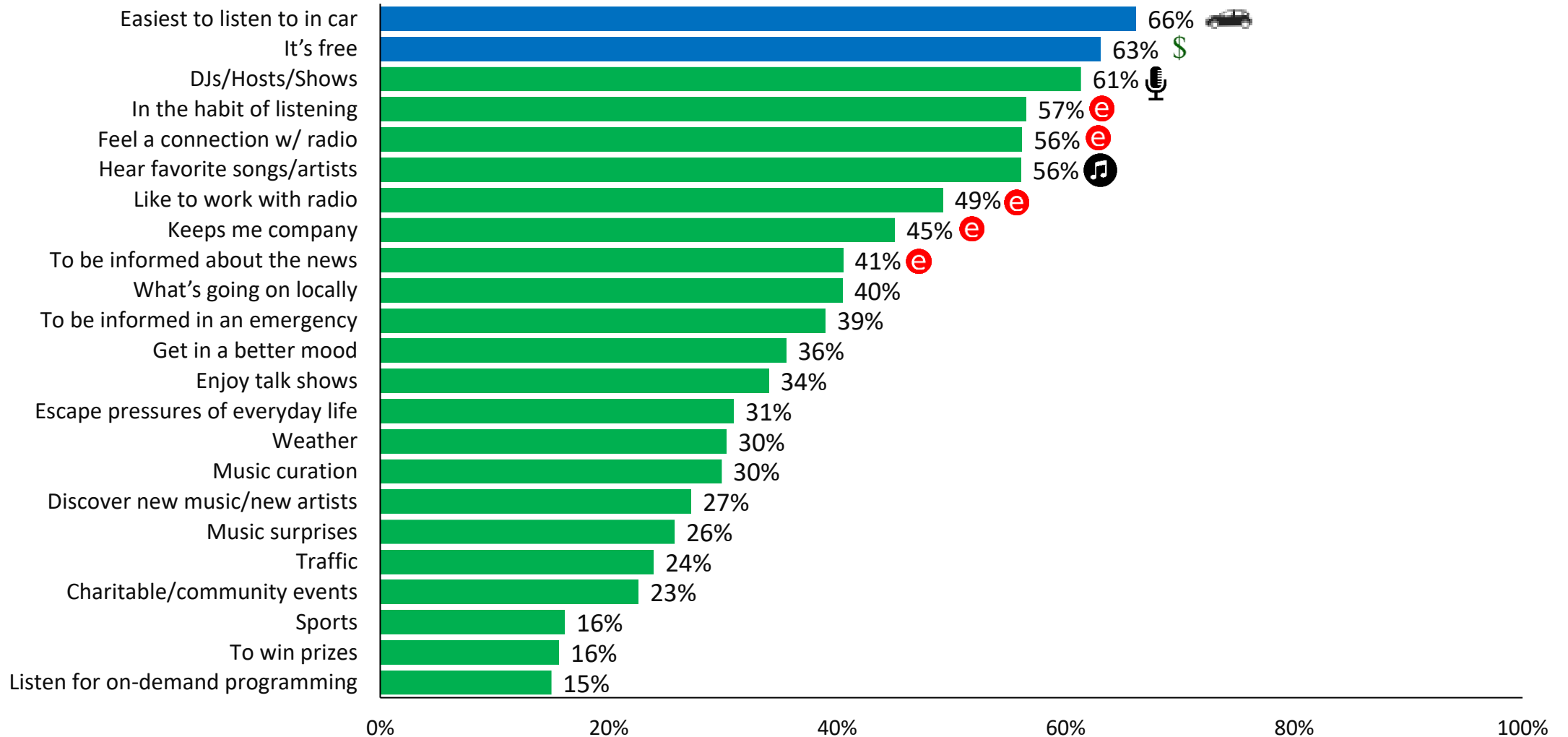
AM/FM Listening Remains Stable, Lowest Among the Youngest Generations



“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)?”



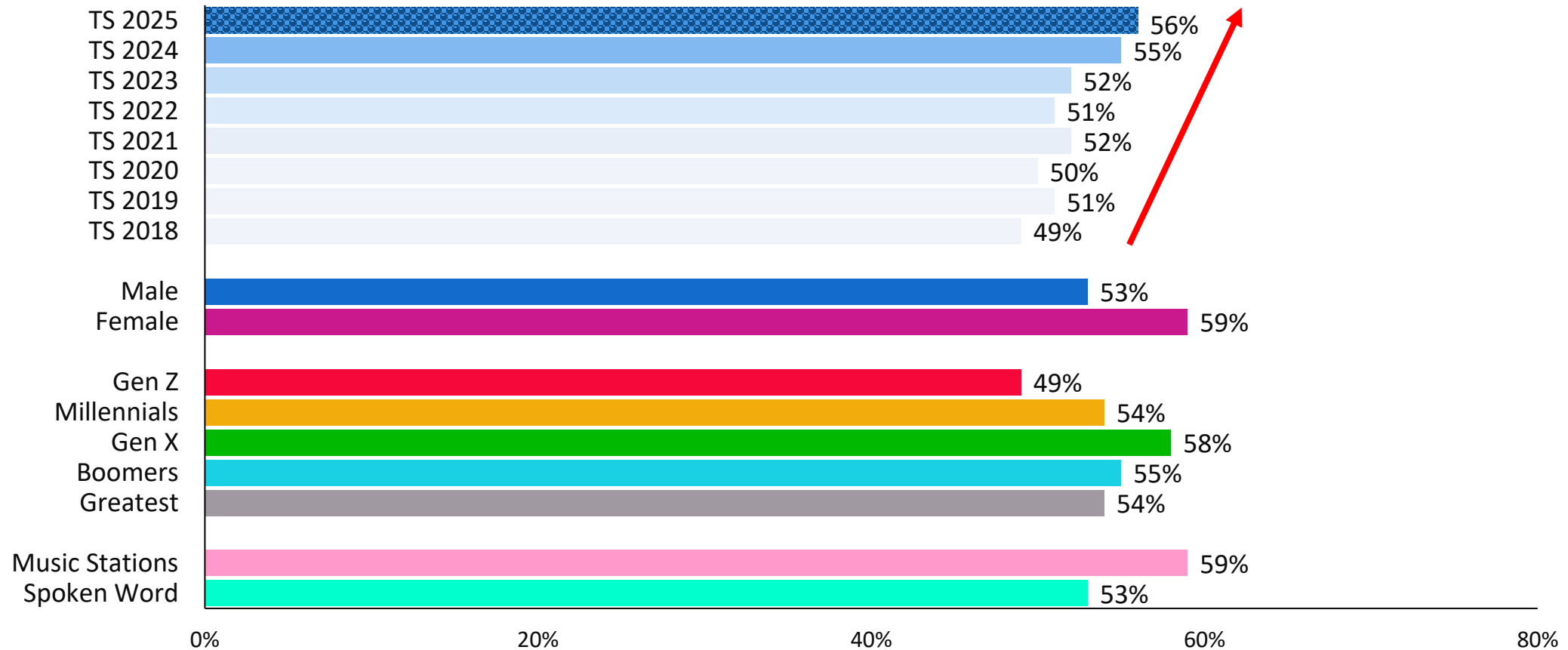
Why AM/FM Radio? Two-Thirds Say It's Easiest to Listen to In the Car, Followed By It's FREE



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

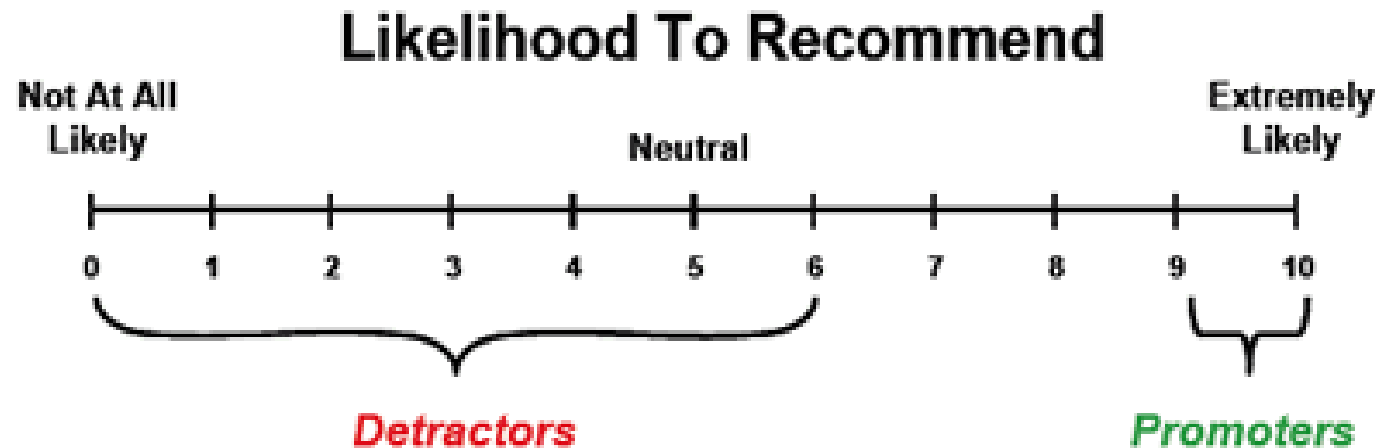
Listeners Increasingly Feel a Greater Connection With Local Radio vs. Other Audio

“I Feel a Connection with Local Radio Stations That I Don’t With Other Types of Audio ”



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

NET PROMOTER



% Promoters

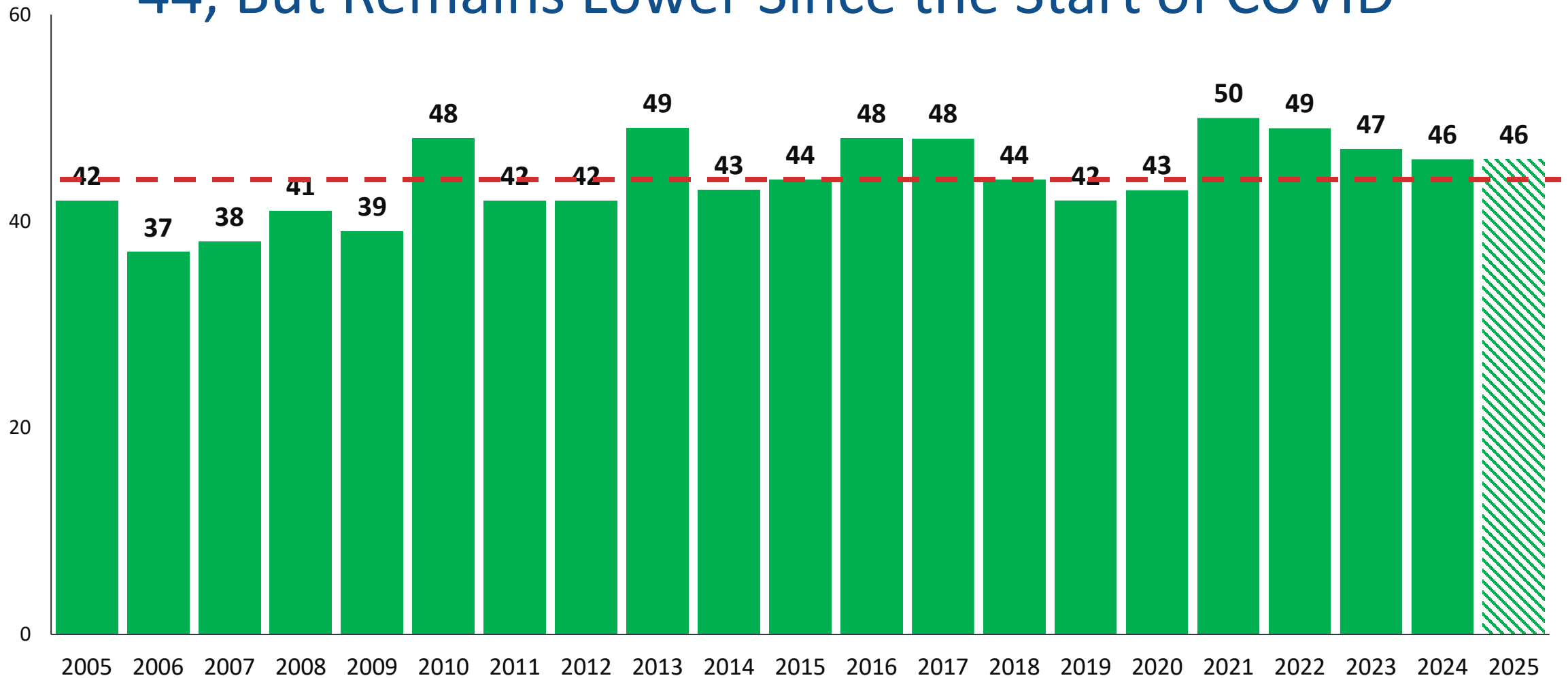
—

% Detractors

=

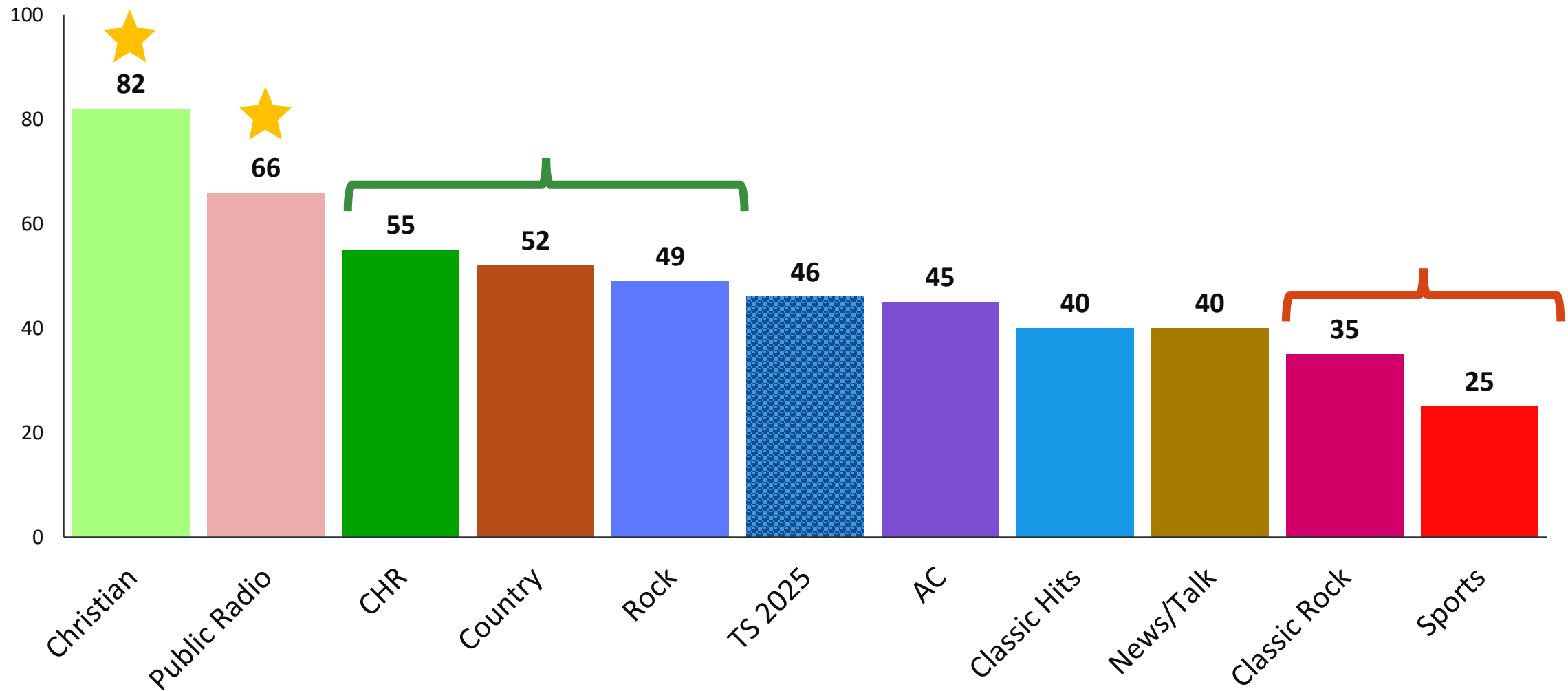
Net Promoter Score

In 20+ Years of NPS, 2025 Again Beats the Average of 44, But Remains Lower Since the Start of COVID



Net Promoter Score (NPS)

As Usual, Christian Radio Leads NPS; CHR, Country, and Rock P1s Are the Best “Recommenders” in Commercial Radio



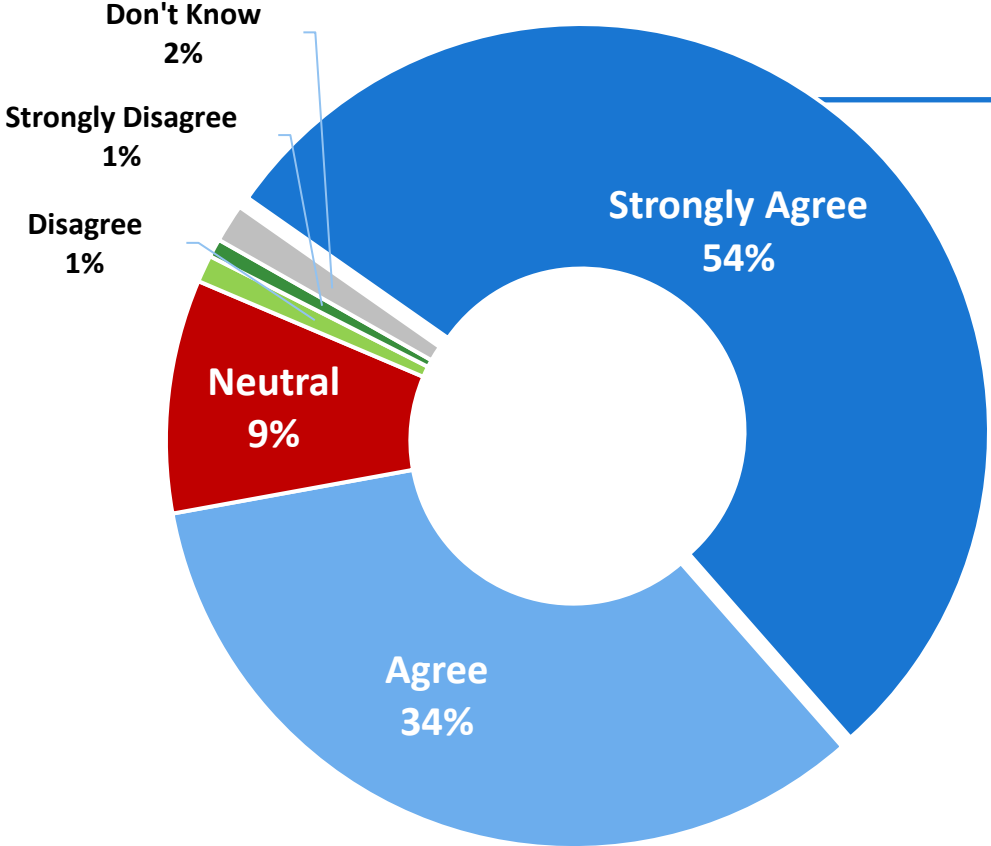
Net Promoter Score (NPS)

2

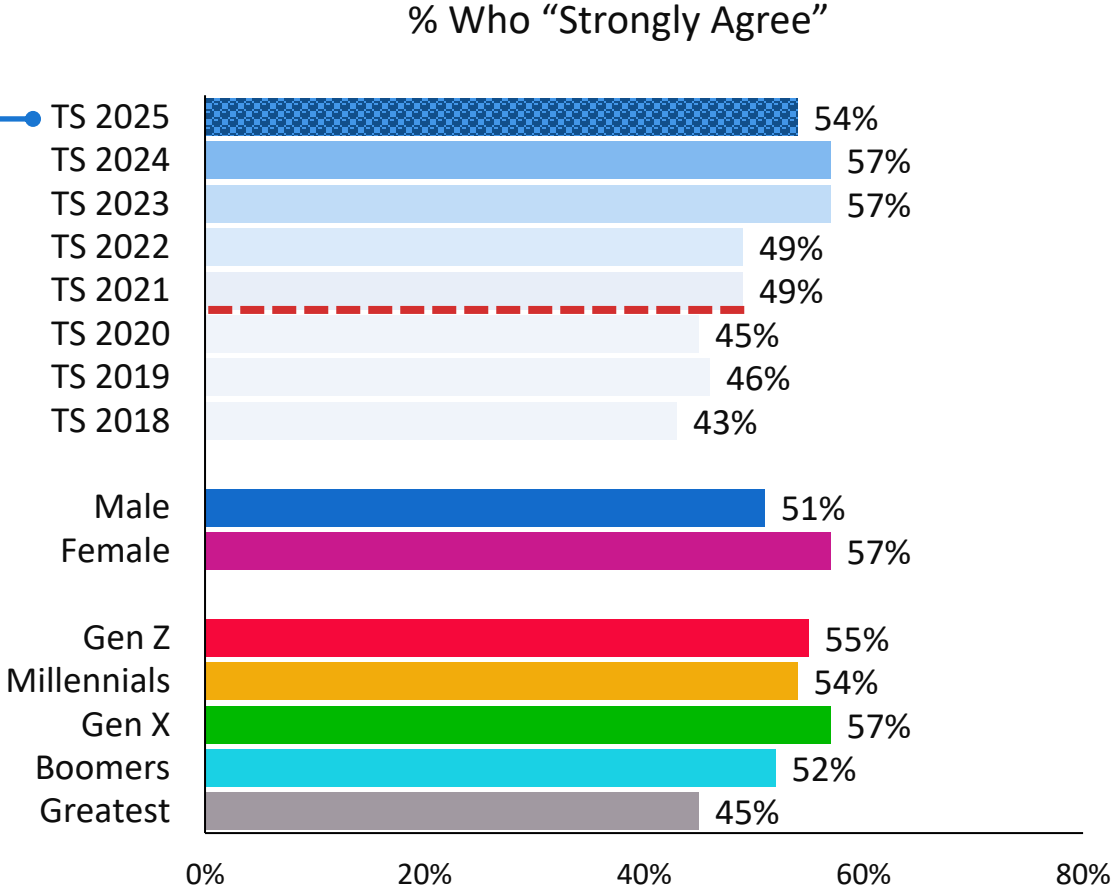
Being local –
having a sense of
place – is a real
strength and not
just a slogan;
more important
since COVID.



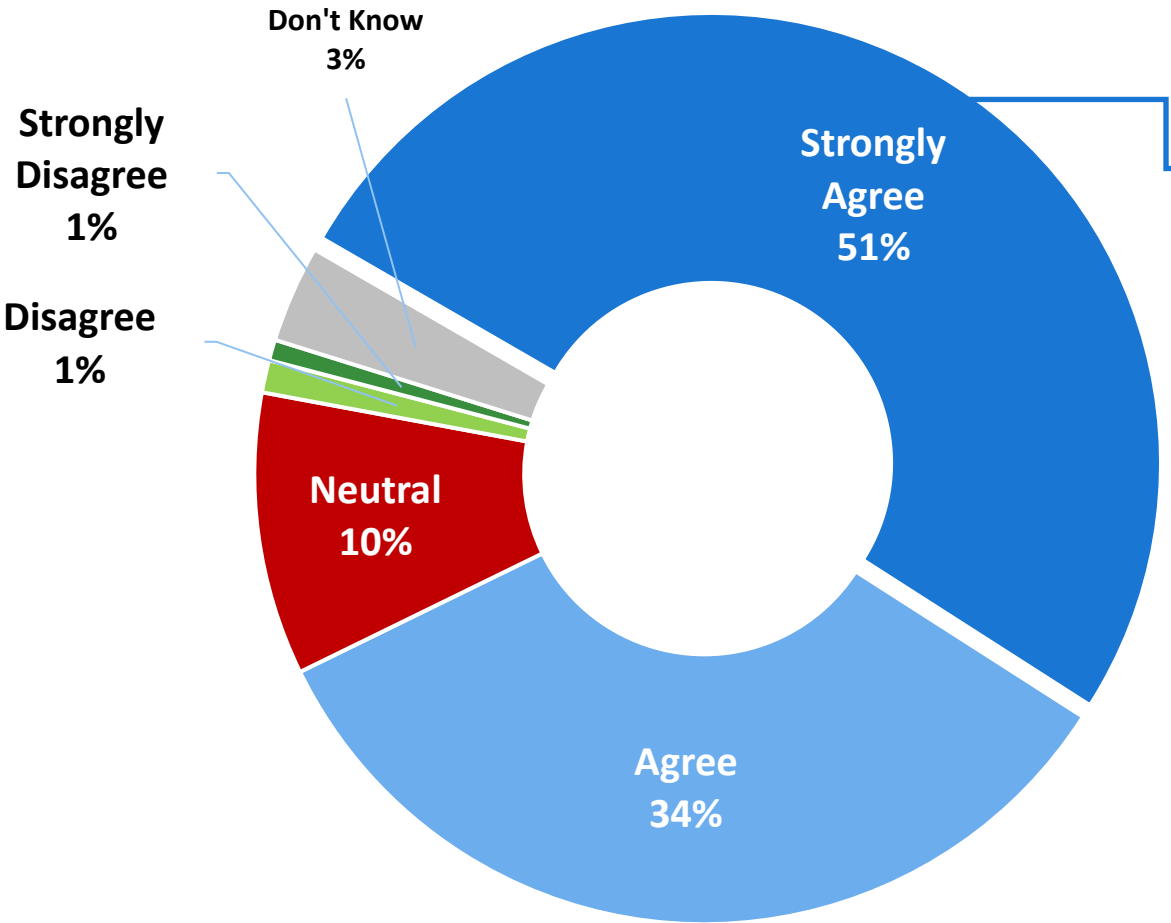
Since COVID, More Than Half Continue to Cite Radio's Local Edge As a Key Advantage



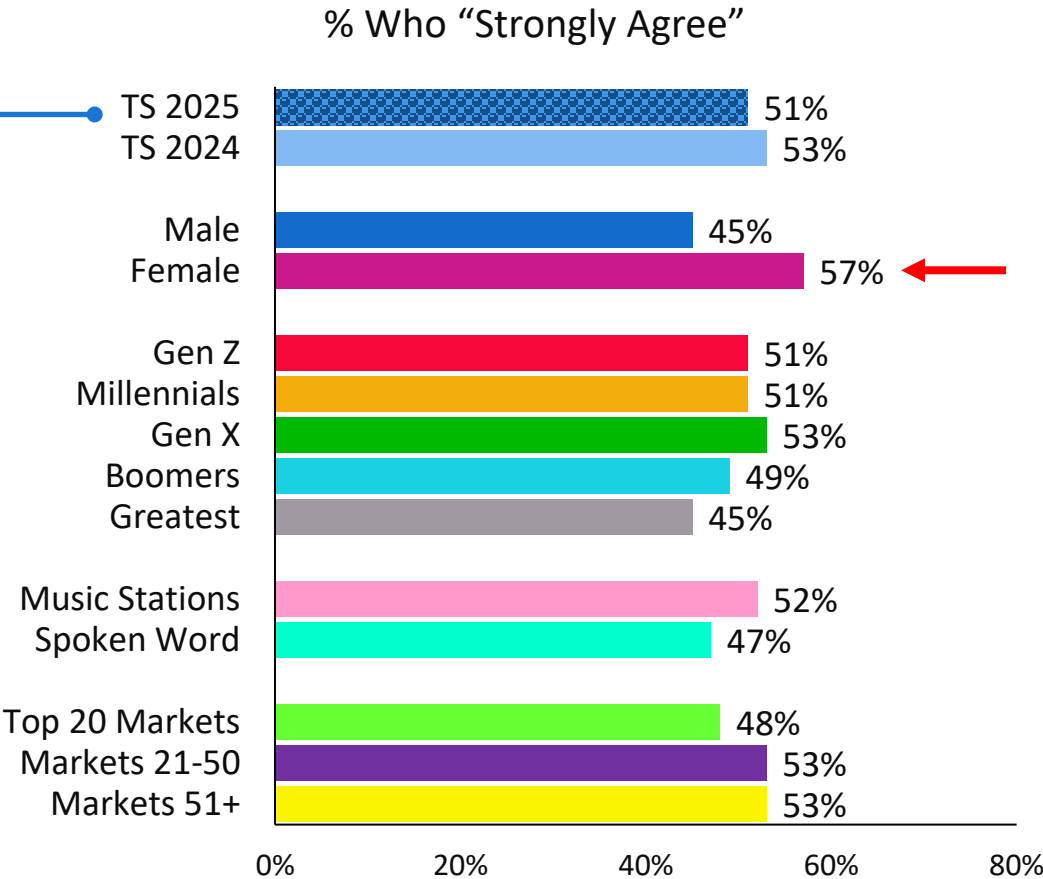
"One of radio's primary advantages is its local feel"



Radio Listeners Say Their P1 Station Is Well-Connected to the Local Community, Especially Women



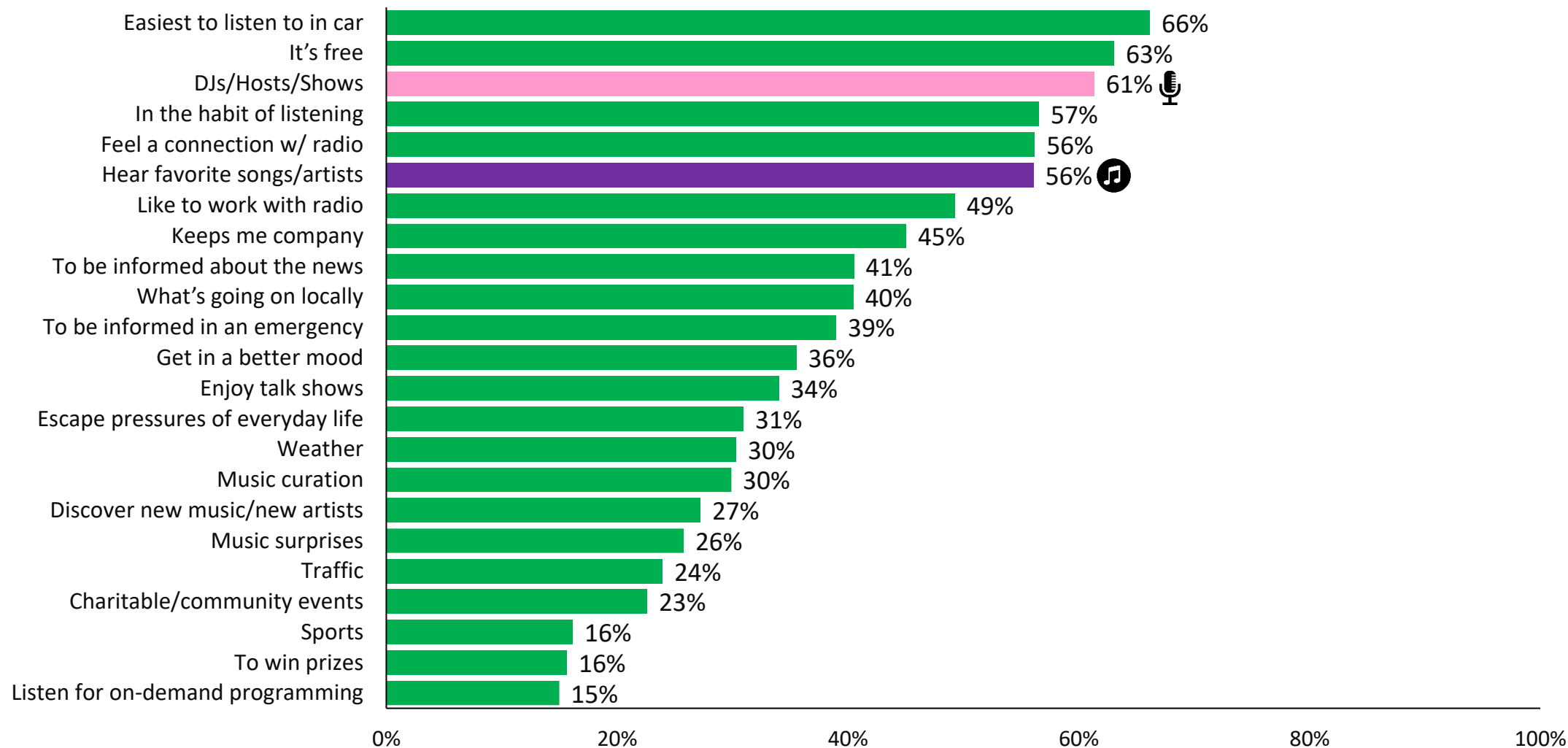
“THE STATION THAT SENT ME THIS SURVEY is well-connected to the local community”





Over the past seven surveys, radio hosts have jumped ahead of music as a key attribute that drives listening.

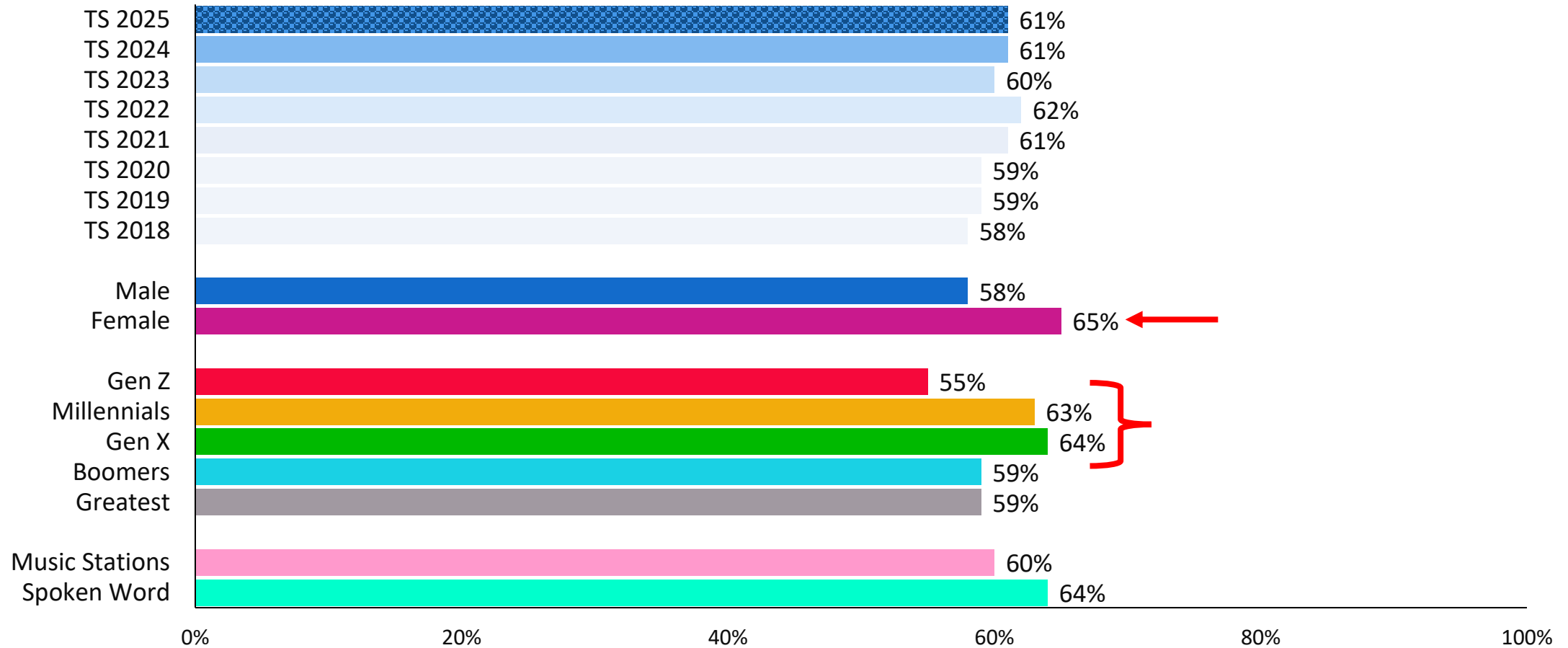
Personalities Still Outpace Music in Appeal, But It Remains Close



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

Personality Appeal Is Highest Among Women, Millennials and Gen X

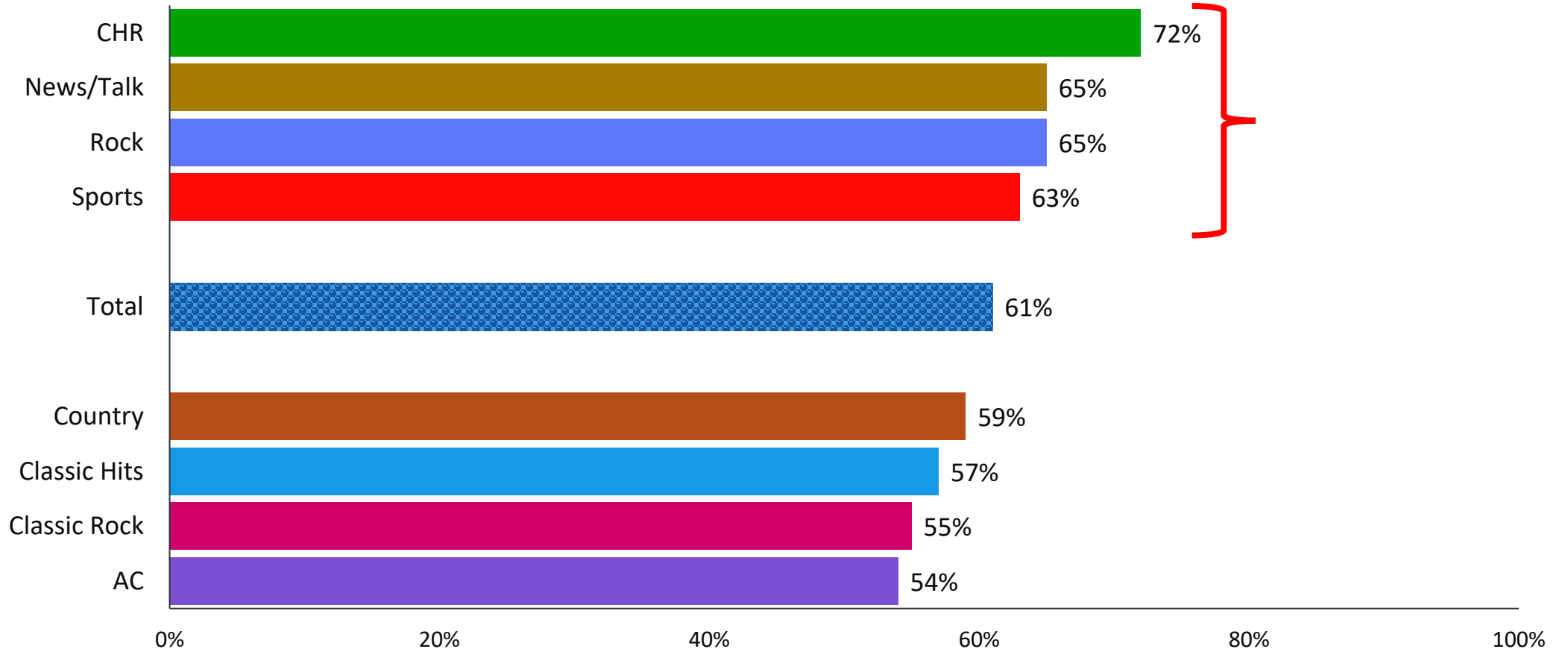
“I Like Particular DJs, Shows, or Hosts”



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

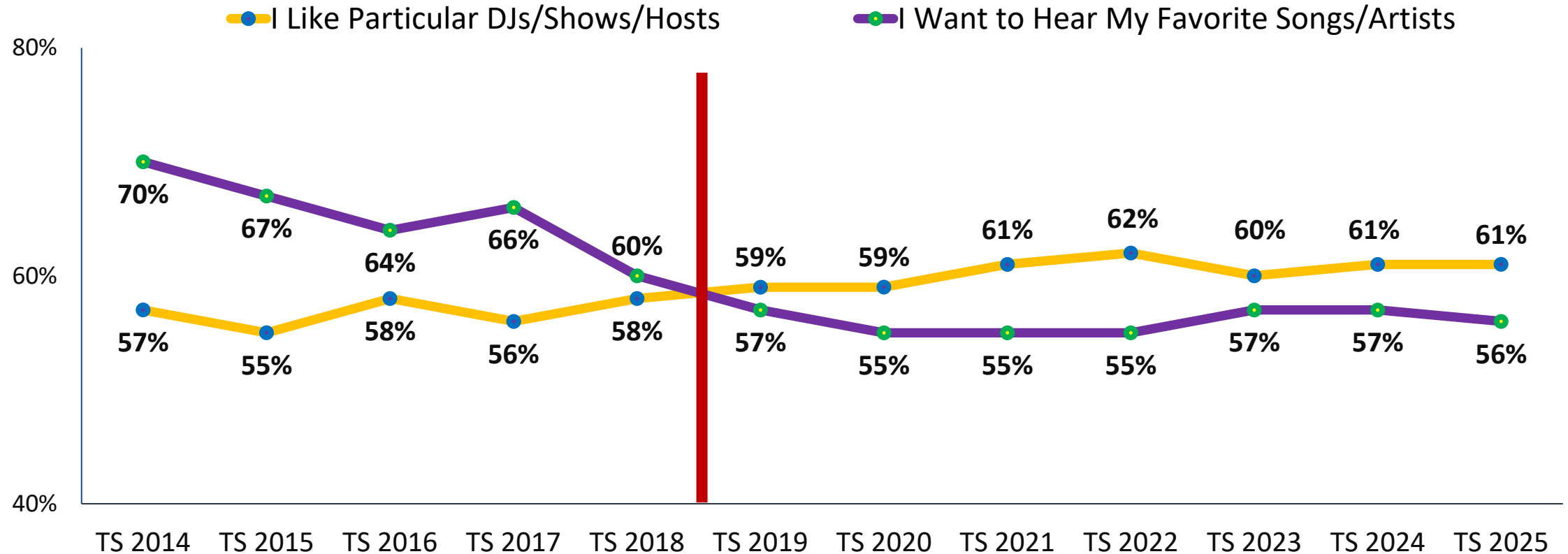
Personality Appeal Is Highest Among CHR, News/Talk, Rock, and Sports Fans

“I Like Particular DJs, Shows, or Hosts”



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

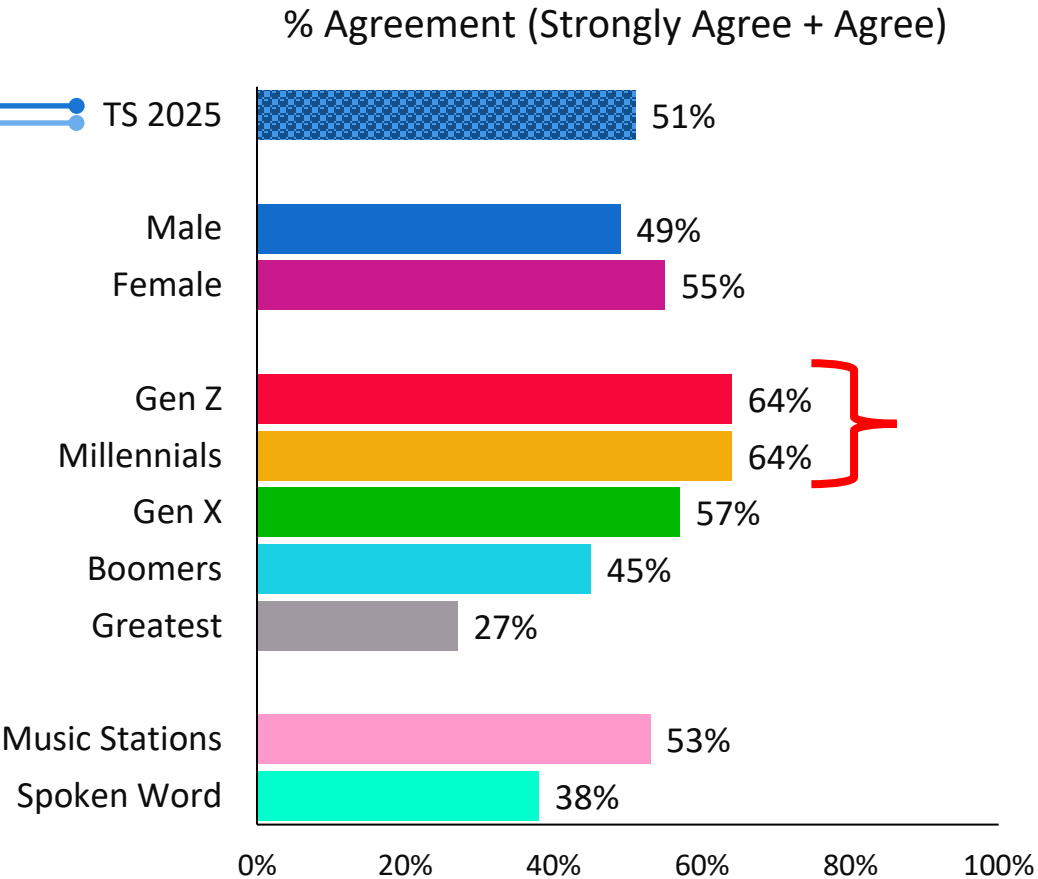
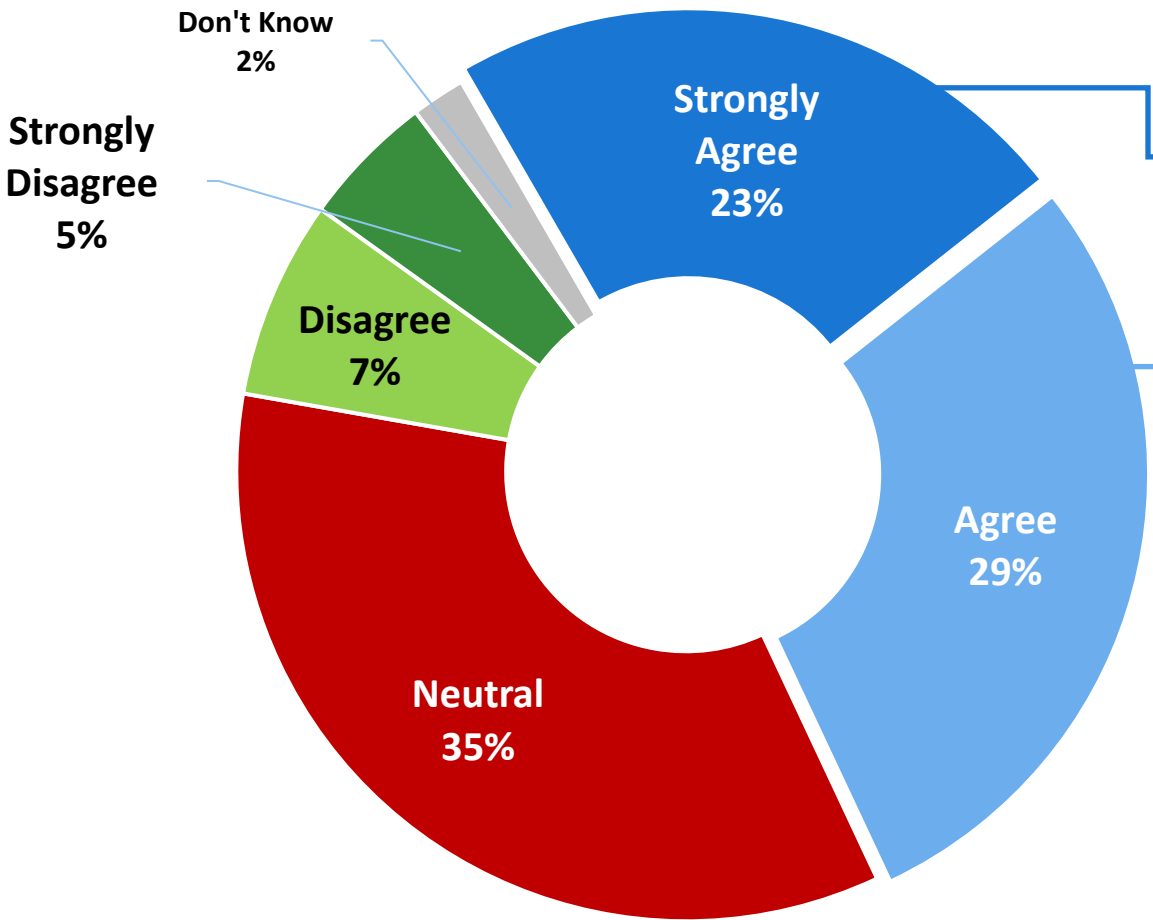
Personalities Have Outpaced Music As a Main Reason For Listening to Radio Since 2019



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

NEW

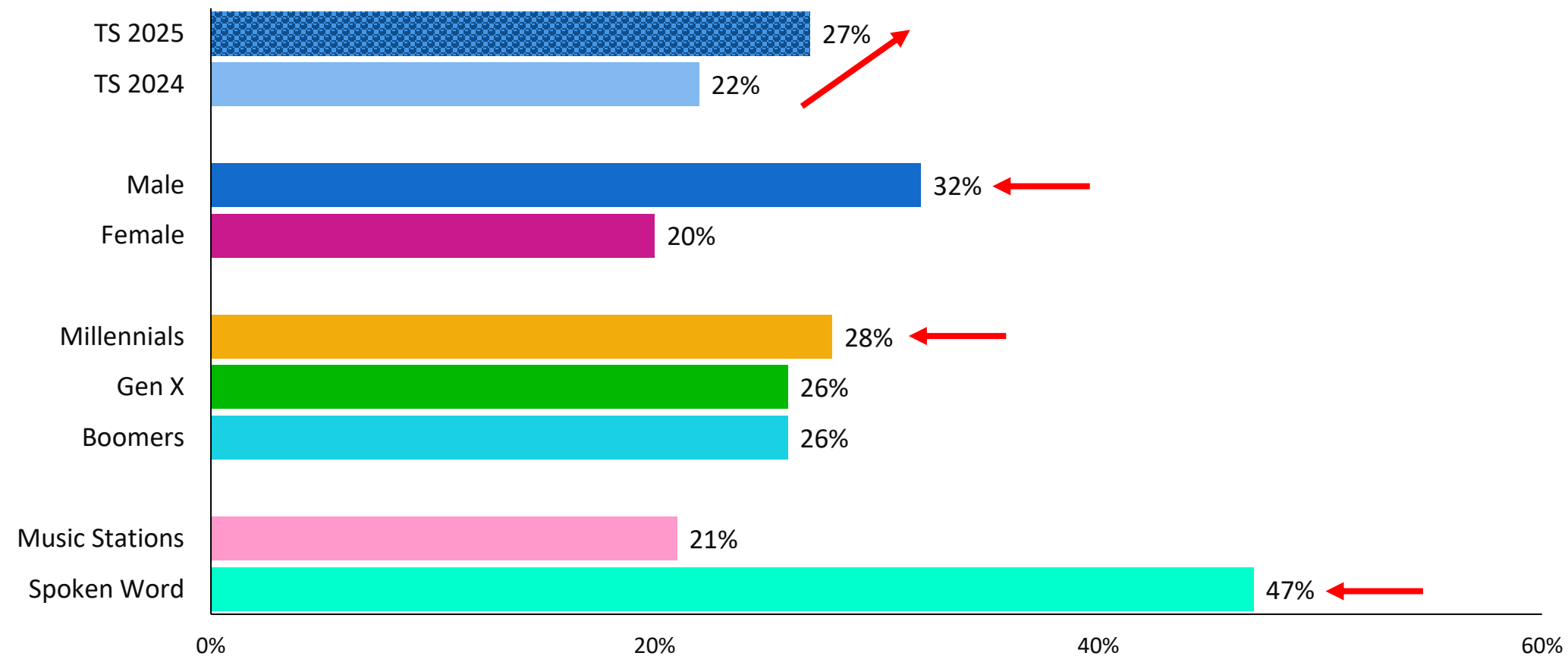
Half Are Interested in Connecting With Their Favorite On-Air Talent – Especially the Youngest Radio Listeners



"I'm interested in meeting personalities/hosts from THE STATION THAT SENT ME THIS SURVEY out and about in the local area and at events"

Personality Turnover Is a Growing Reason for Listening Less

“A Personality or Show I Enjoyed Listening to Is No Longer on Local Radio”

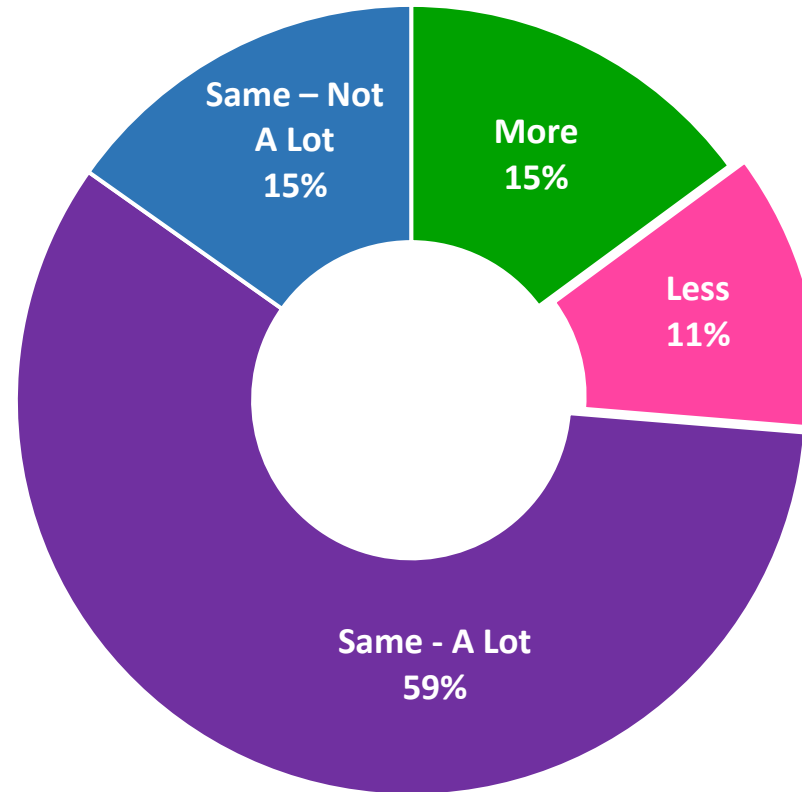


Among those who say they are listening less to AM/FM radio in the past year, % who say this is a main reason they listen less



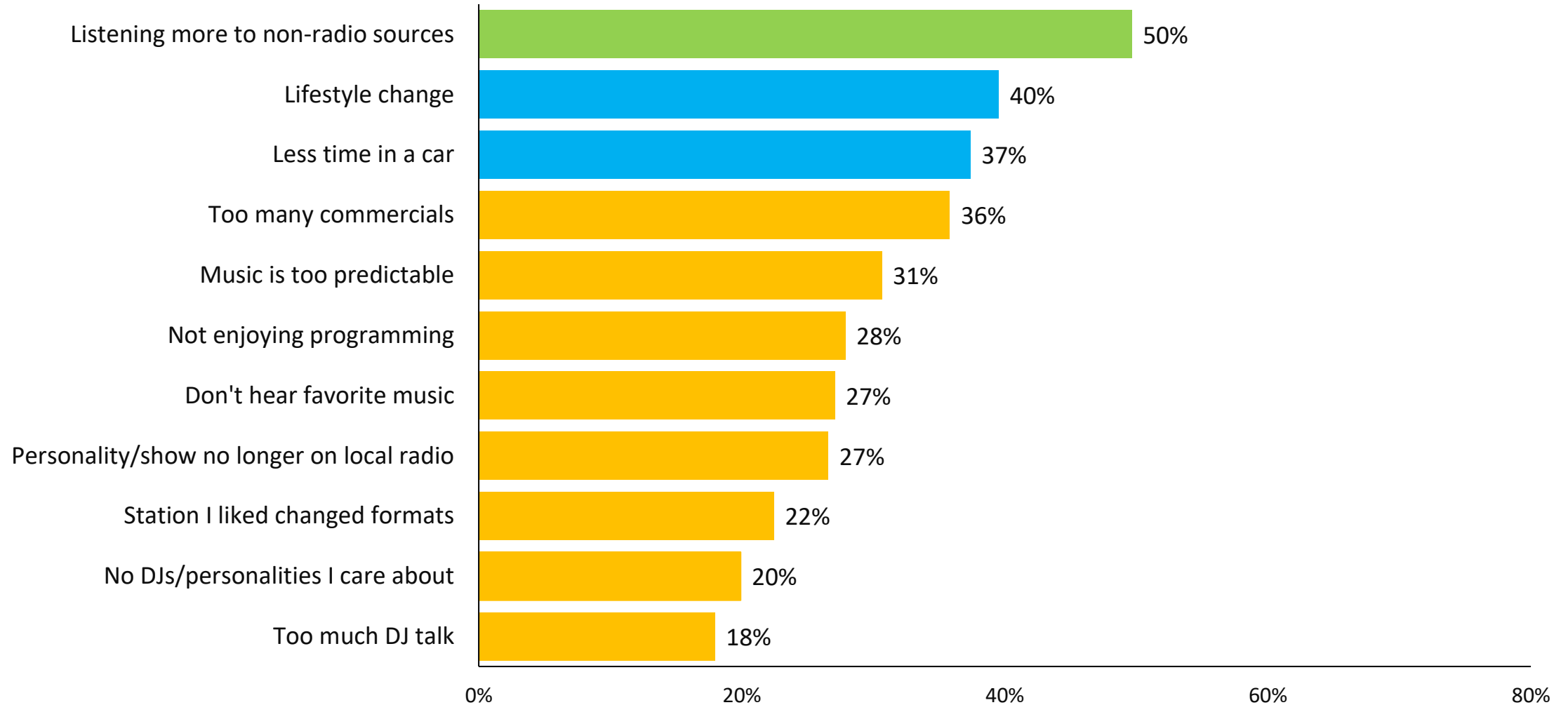
Why are some radio fans listening to LESS radio? (It's a combo of more choice, lagging pandemic issues, and unforced errors.)

Overall, AM/FM Radio's Momentum Is Holding, But One in Ten Radio Fans Say They've Listened Less Year-Over-Year



Among those who listen to AM/FM radio

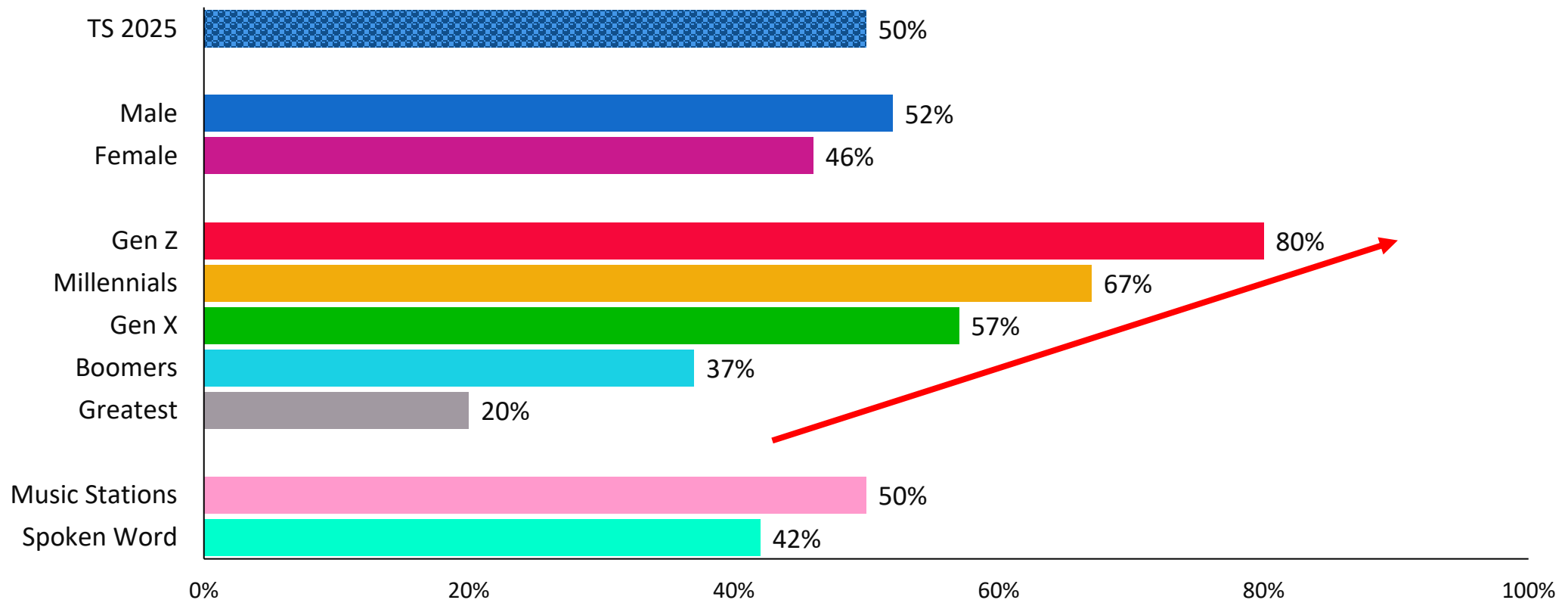
Why Less Radio? More Choices Followed By Lifestyle Changes, Less Time in a Car and Spot Loads



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

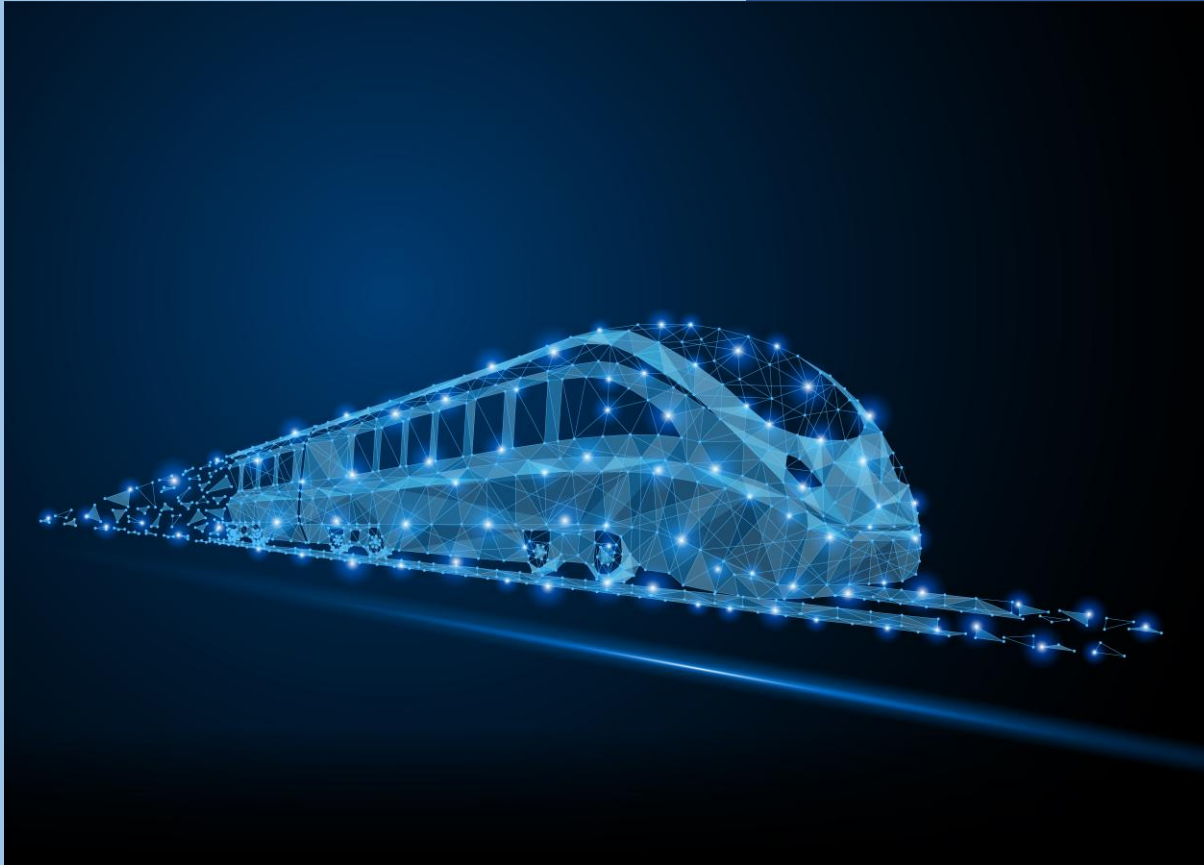
More Music Choice Is a Primary Obstacle to Radio Listening for Gen Z, Millennials, and Gen Xers

***“Listening More to Non-Radio Sources
(Spotify, SiriusXM, Podcasts, My Own Music, Smart Speakers, Etc.)”***



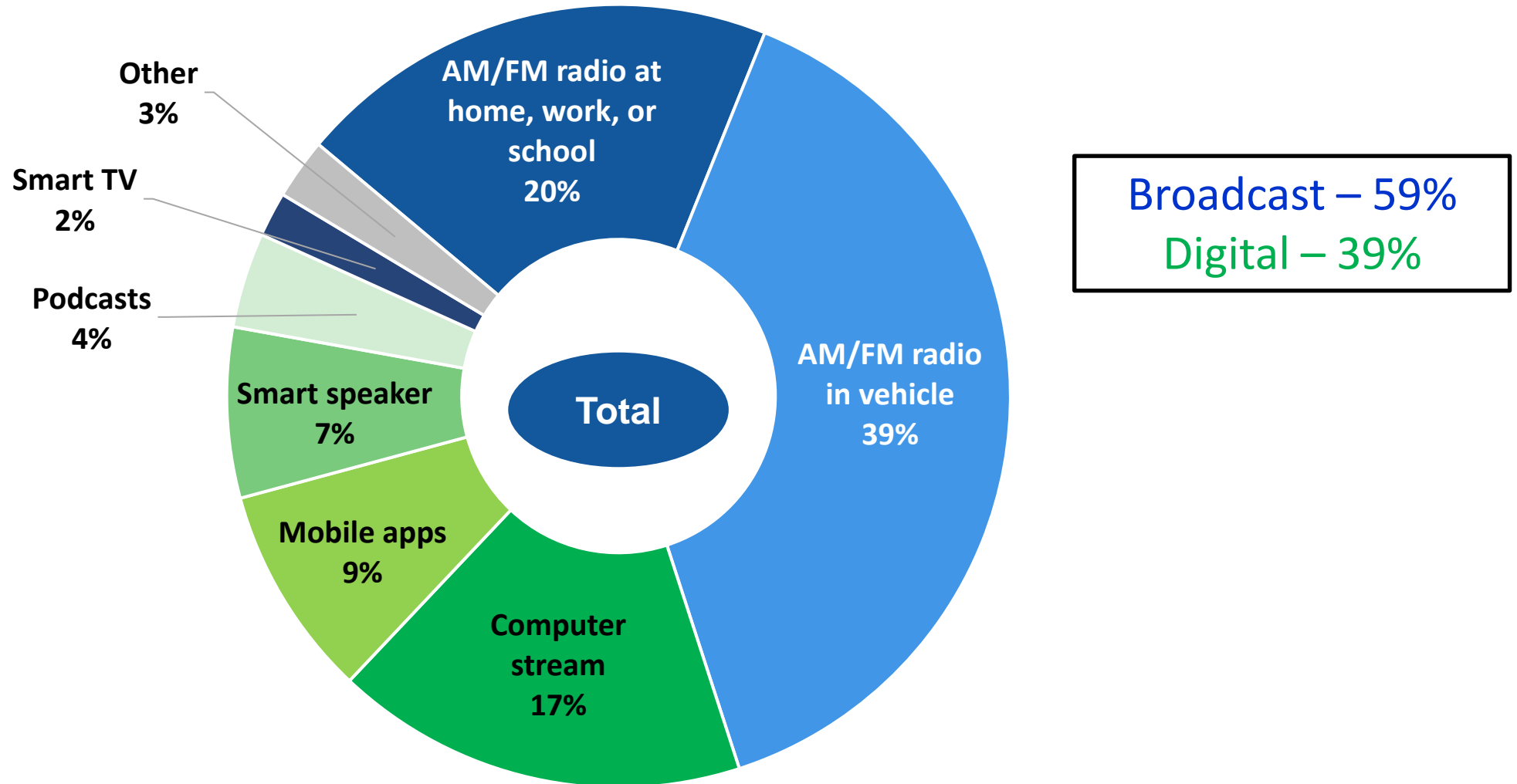
Among those who say they are listening less to AM/FM radio in the past year, % who say this is a main reason they listen less

5

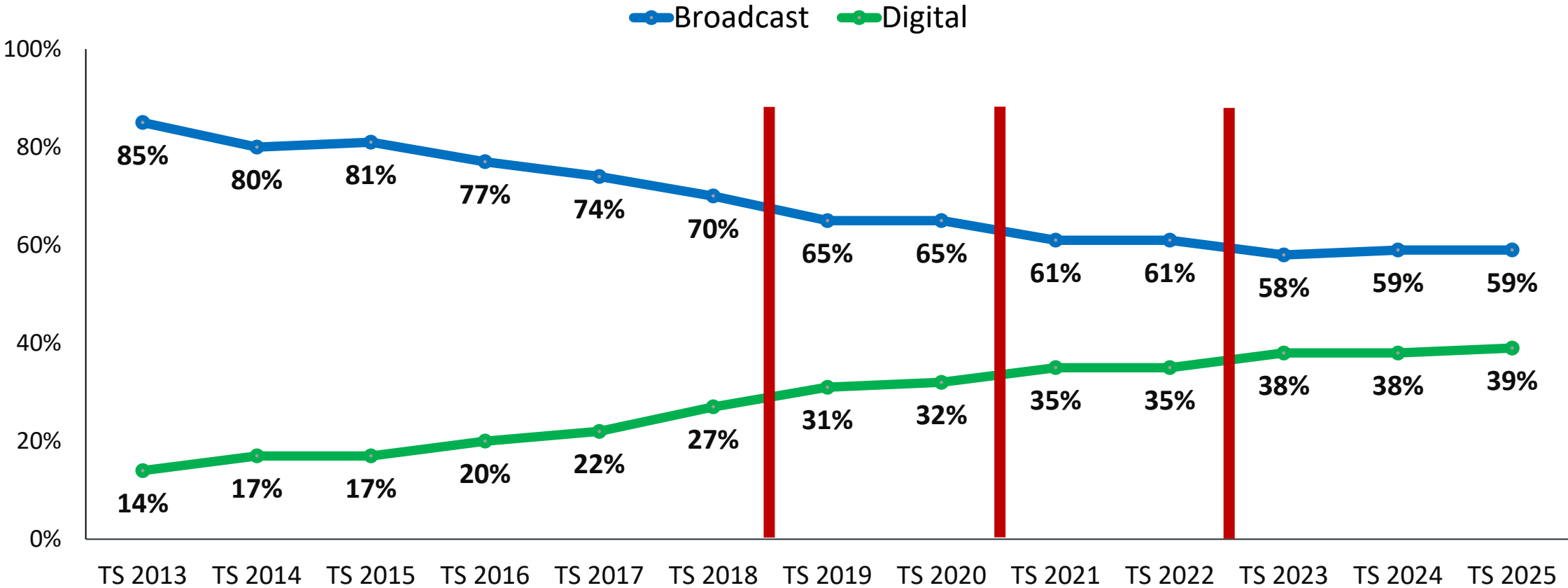


Digital continues to play a key role in AM/FM radio usage, but the transformation has slowed.

How Do Radio Fans Listen to Their Favorite Stations? Digital Platforms Remain “Flattish”

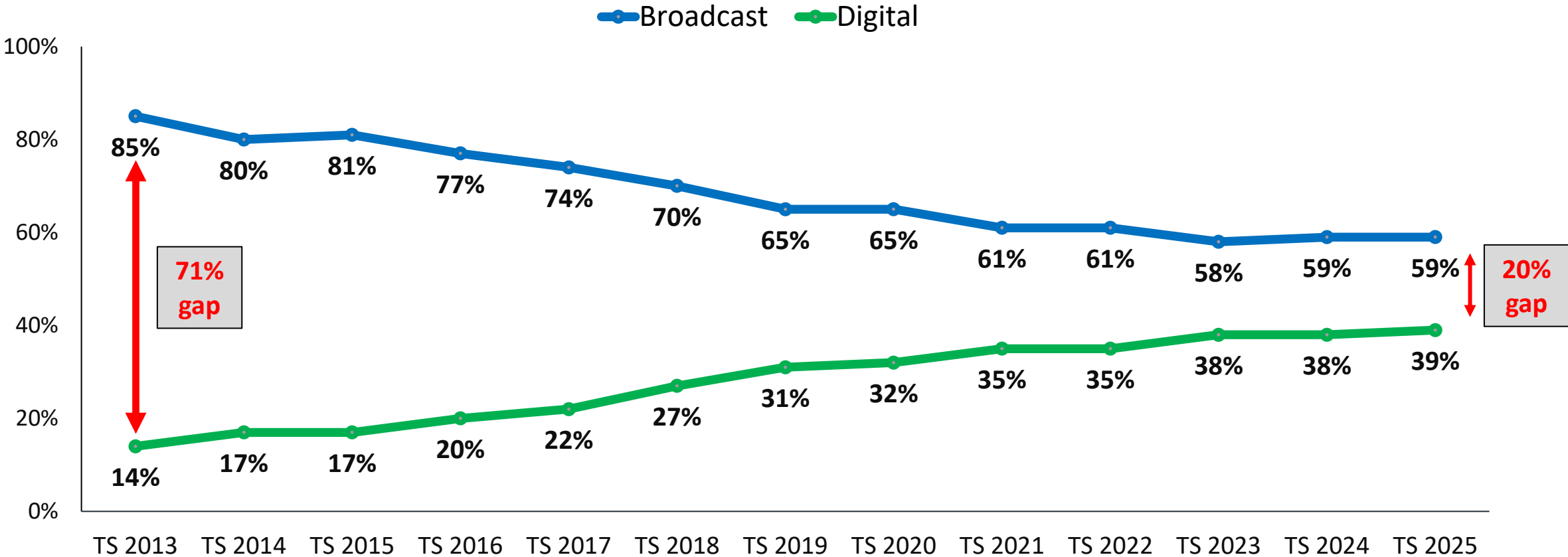


P1 Station Listening Platform Trend: Broadcast vs. Digital



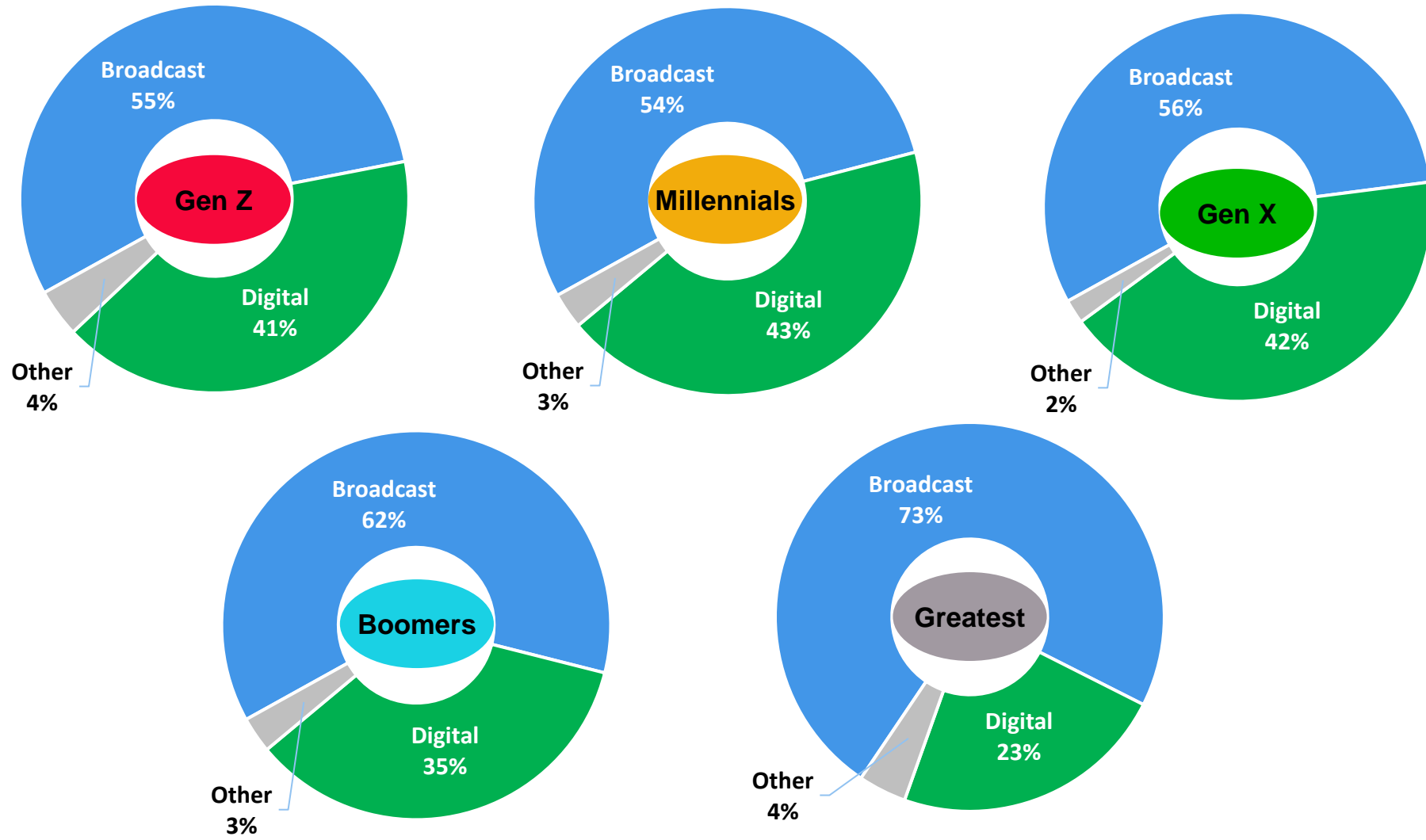
% of time spent with P1 station in a typical week via
broadcast platforms (an AM/FM radio at home/school/work or in a vehicle)
vs. digital platforms (computer, mobile, smart speaker, podcasts, smart TV)

P1 Station Listening Platform Trend: Broadcast vs. Digital



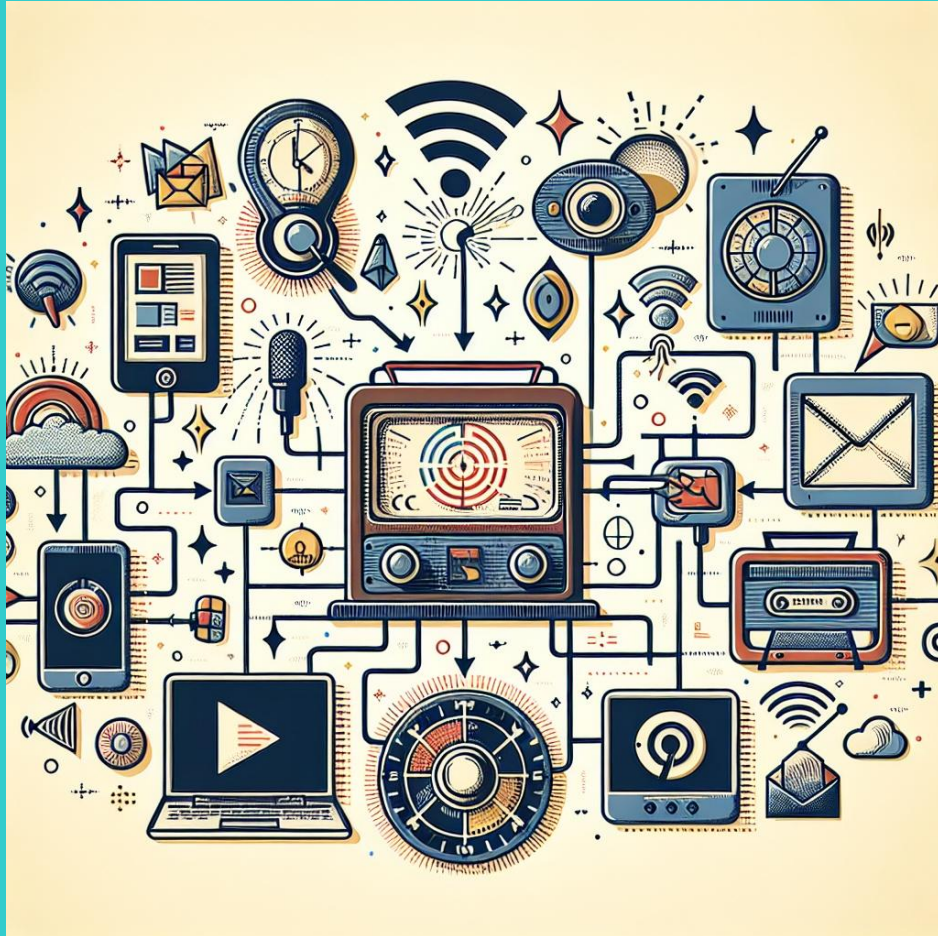
% of time spent with P1 station in a typical week via
broadcast platforms (an AM/FM radio at home/school/work or in a vehicle)
vs. digital platforms (computer, mobile, smart speaker, podcasts, smart TV)

Generational Listening Platforms: Broadcast vs. Digital



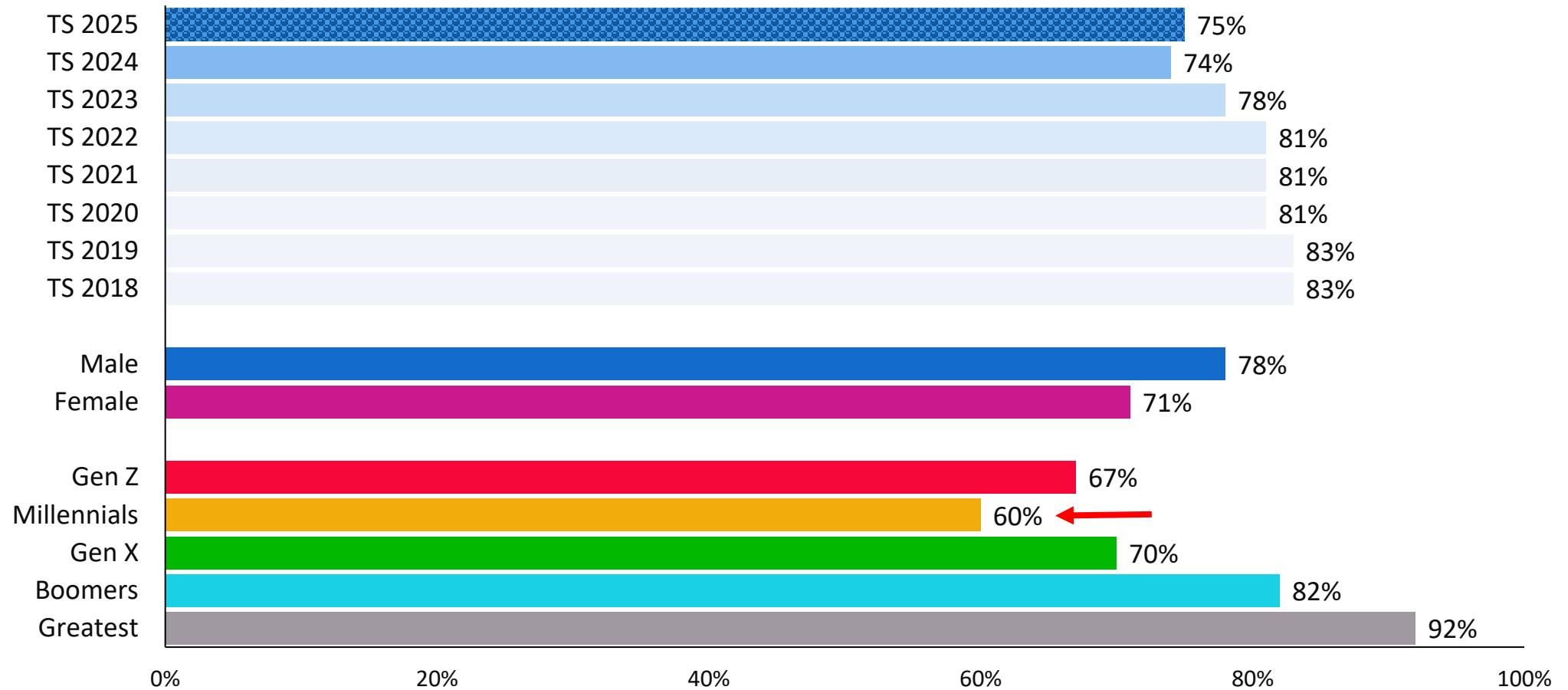
% of time spent with P1 station in a typical week via
broadcast platforms (an AM/FM radio at home/school/work or in a vehicle)
vs. digital platforms (computer, mobile, smart speaker, podcasts, smart TV)

6



For radio, it's about meeting the audience where they are, making content available on the devices that matter, AND setting priorities.

Only Three in Four Have Regular Radios At Home; Millennials Are Least Likely to Own a Working Radio



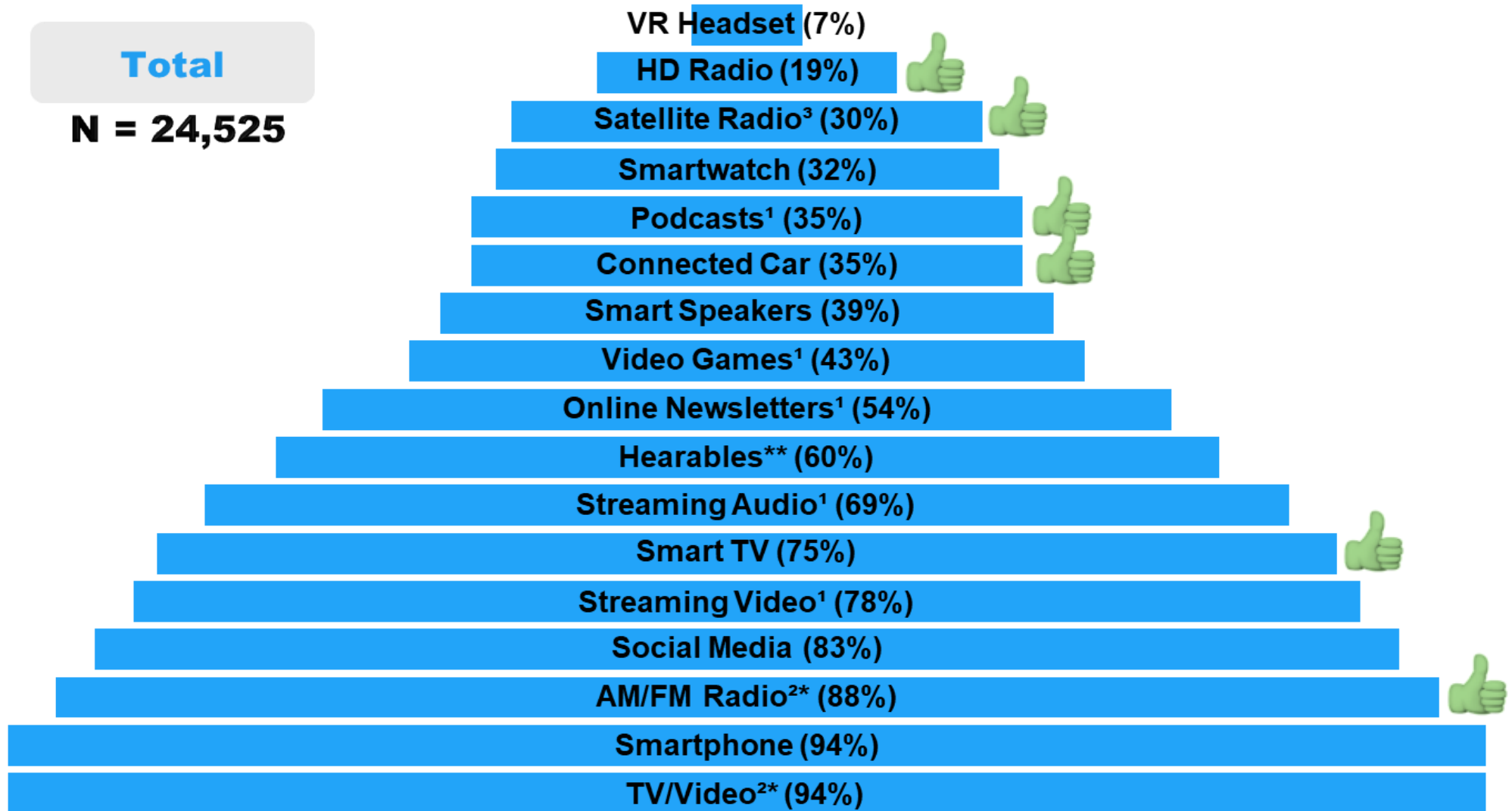
% with a regular radio in working condition where they live that they use



Media Pyramid 2025

Total

N = 24,525



**Total
TS 2024**

8%

17%

28%

33%

31%

32%

39%

44%

60%

68%

73%

79%

83%

86%

94%

95%

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



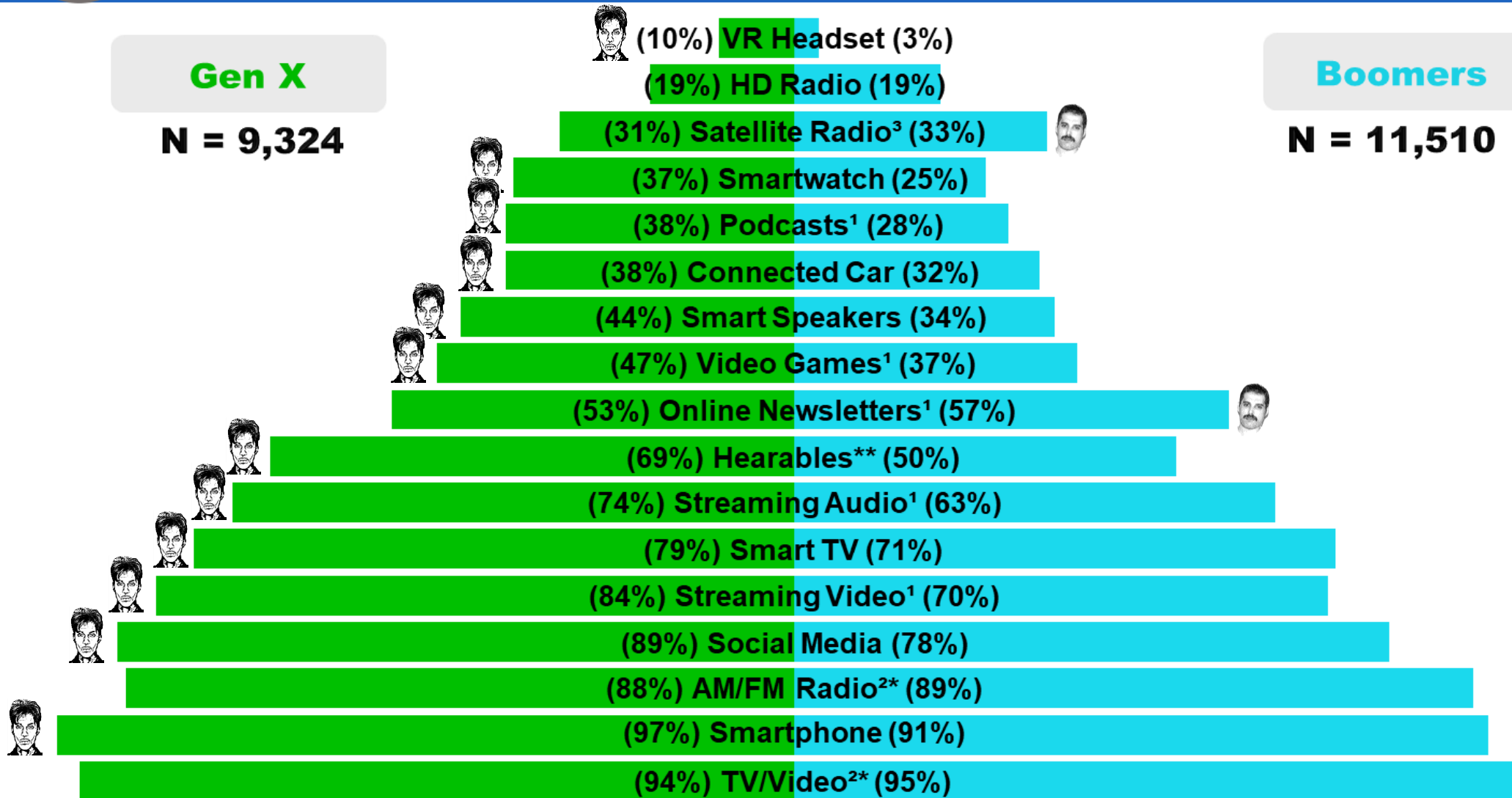
Media Pyramid 2025

Gen X

N = 9,324

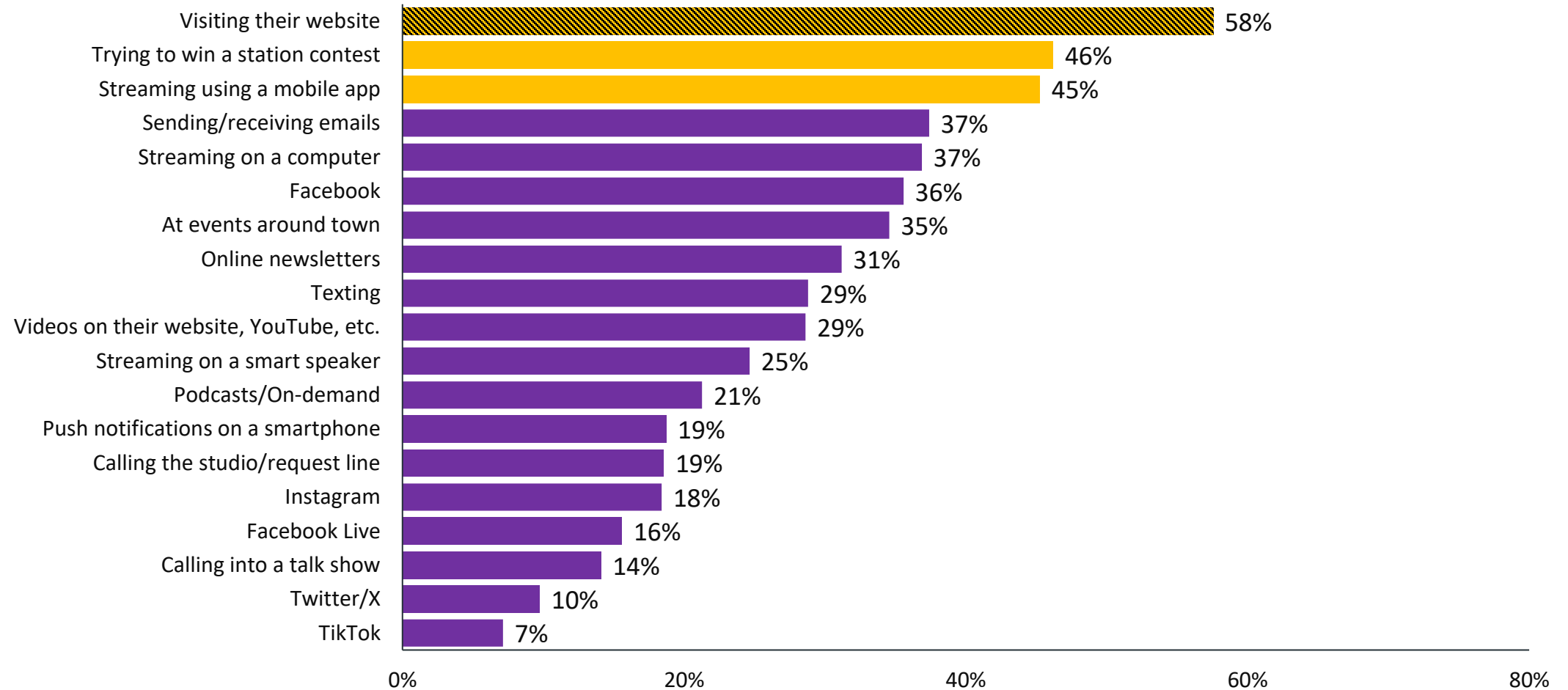
Boomers

N = 11,510



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

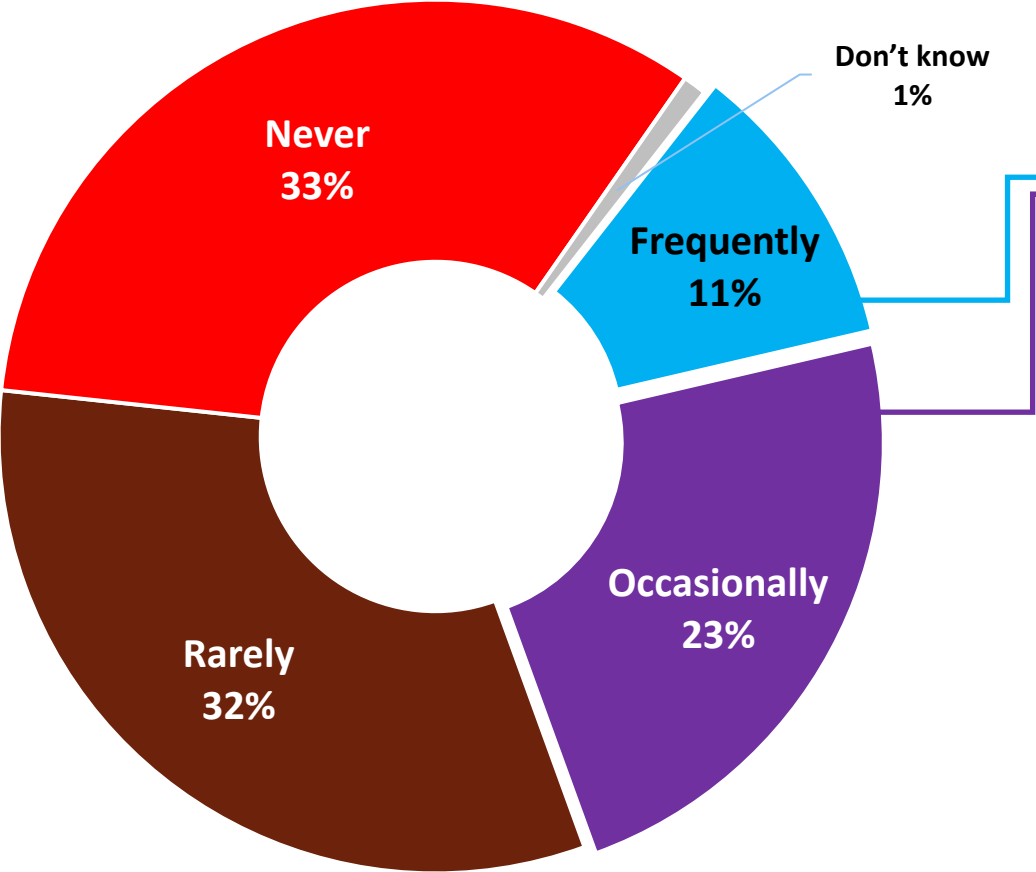
The Most Regular Touchpoints With P1 Stations Occur On the Website, Via Contests, and on the Mobile App



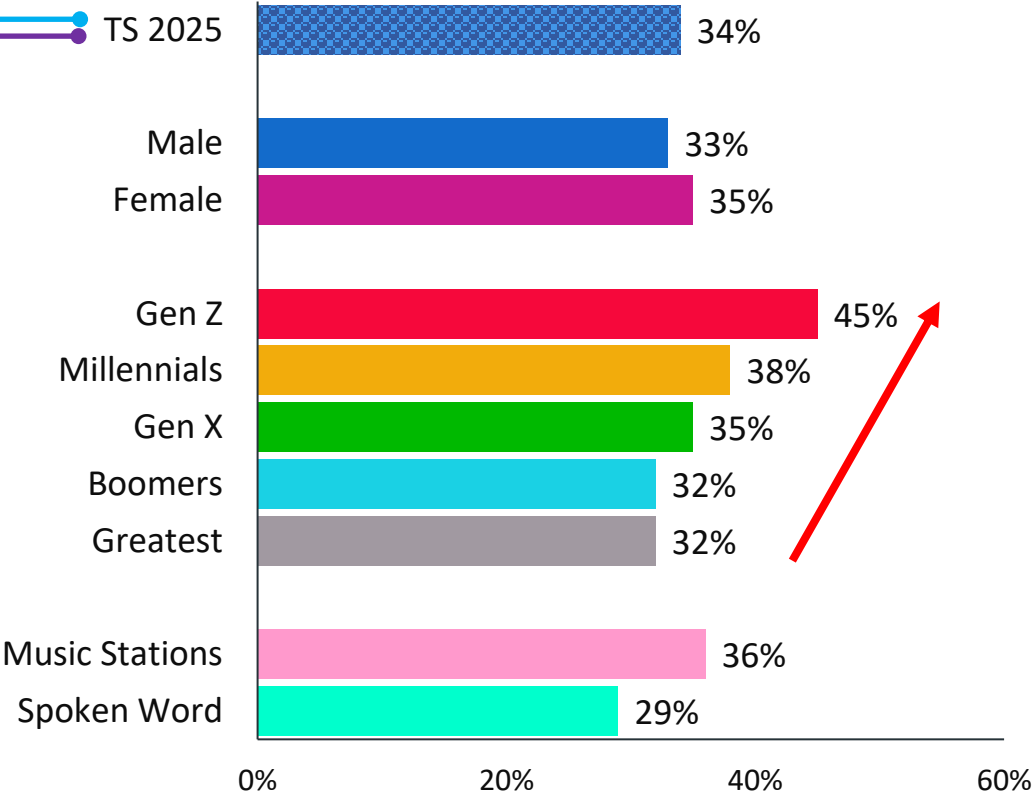
% who “frequently” or “occasionally” access/interact with their P1 station in each way (besides listening on a radio)



One in Three Smart TV Owners Listens to Audio on Their Smart TV at Least Occasionally



% Who Frequently or Occasionally Listen to Any Type of Audio on Their Smart TV

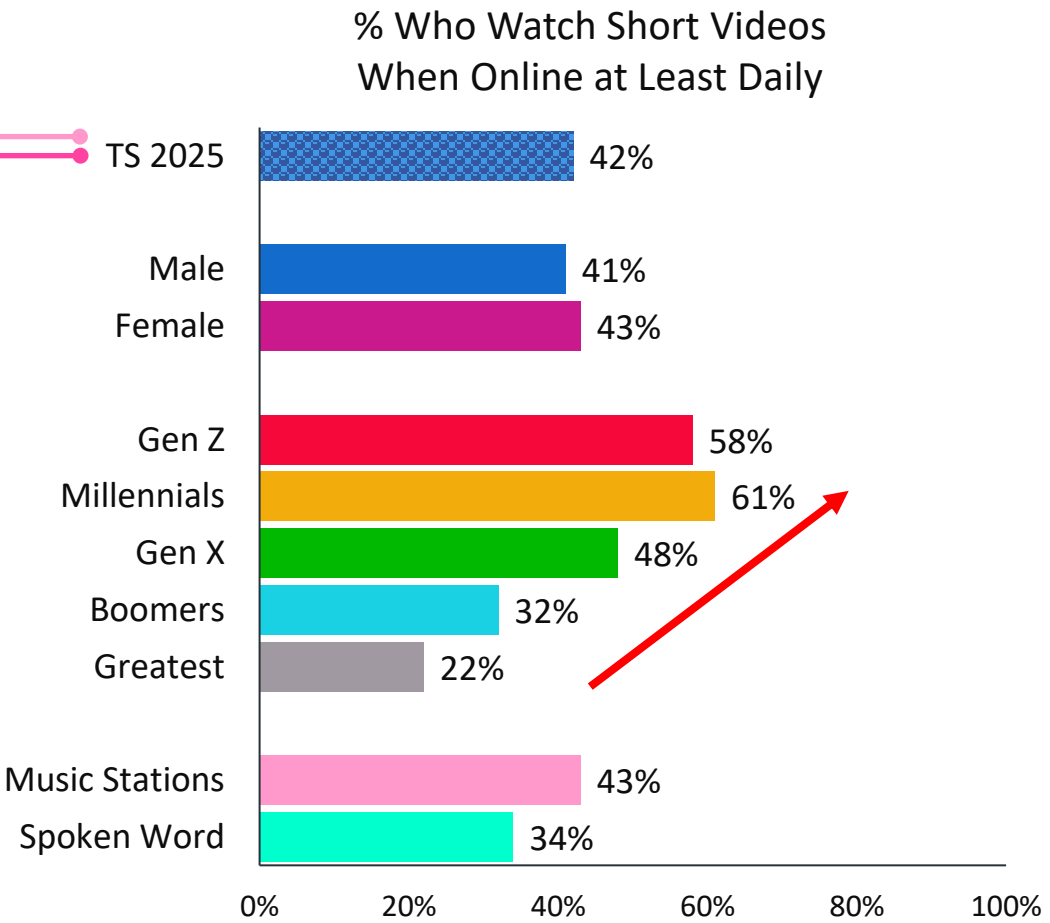
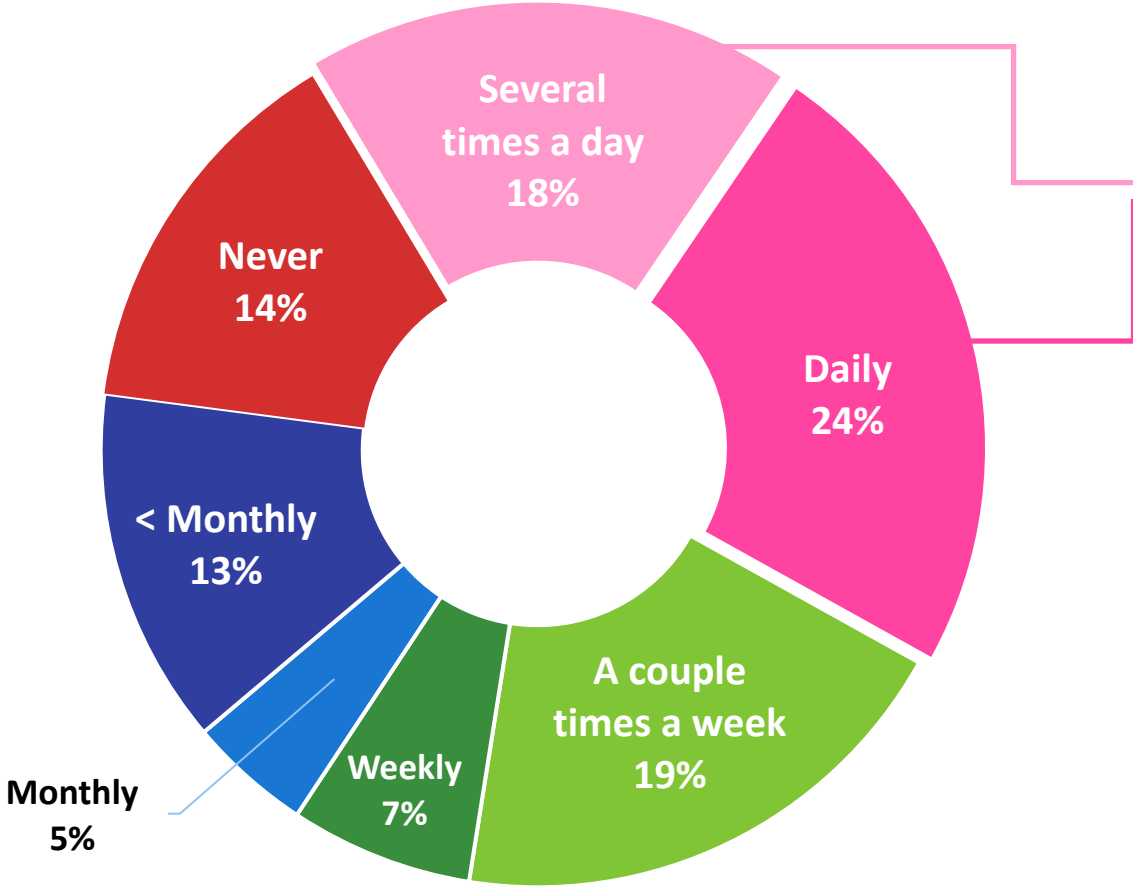


“How often do you LISTEN to any type of AUDIO on your Smart TV (ex. radio station streams, streaming audio apps like Spotify, audio podcasts, audio books, etc.)?”

Among Smart TV owners



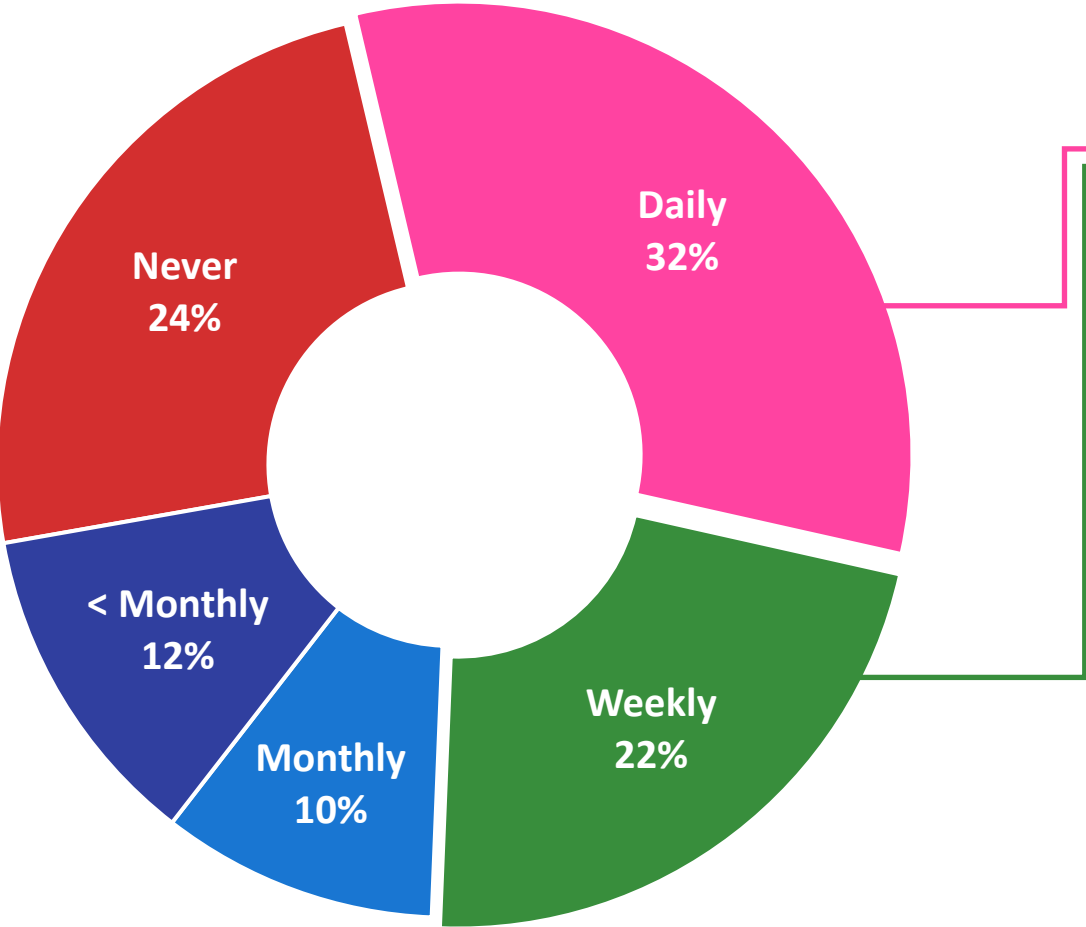
More Than Four in Ten Watch Short Videos When Online at Least Daily



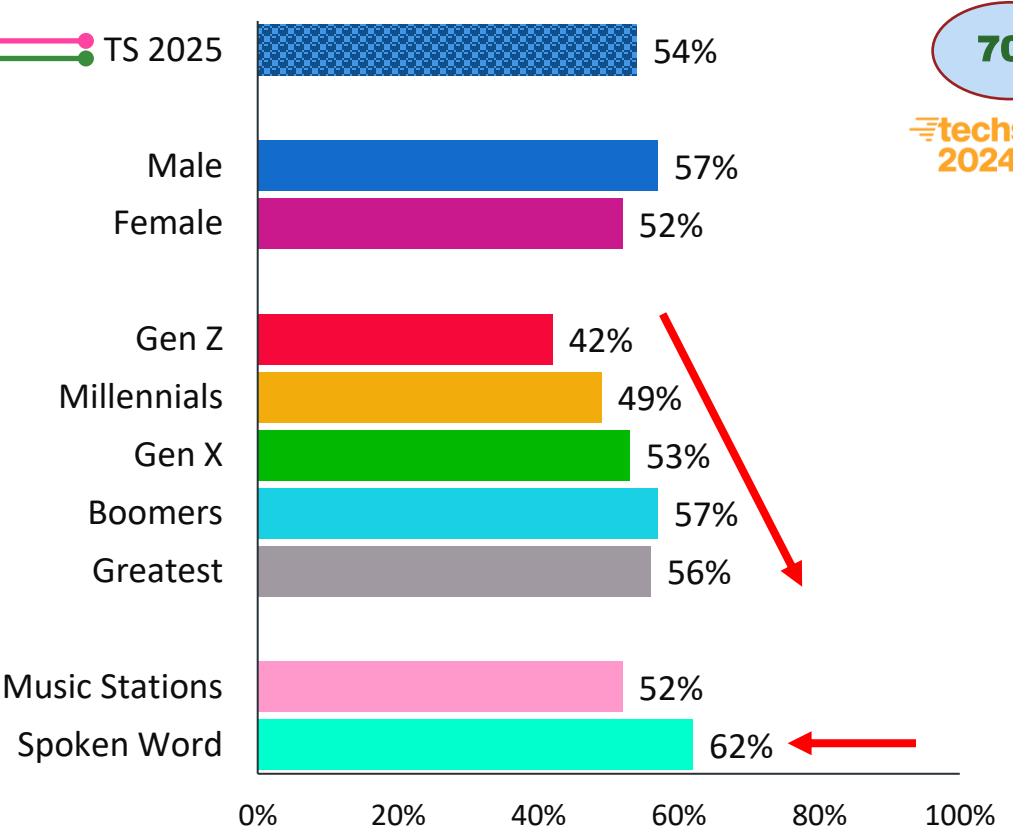
“Many platforms (including social media) post short videos about all sorts of things (current events, comedy, pop culture, etc.). How often do you watch short videos when you’re online, using a mobile phone, etc.?”

NEW

More Than Half Read Online Newsletters Weekly or More, Led By Progressively Older Generations and Spoken Word Fans



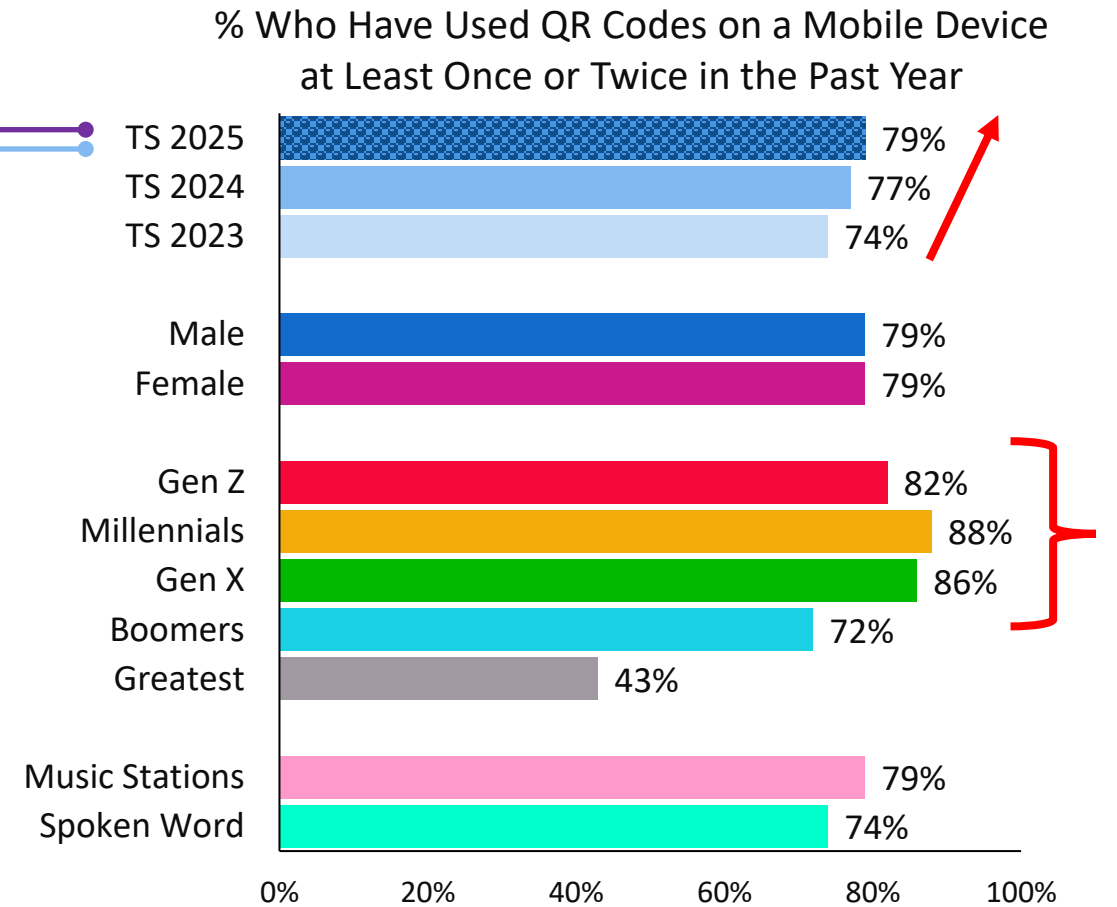
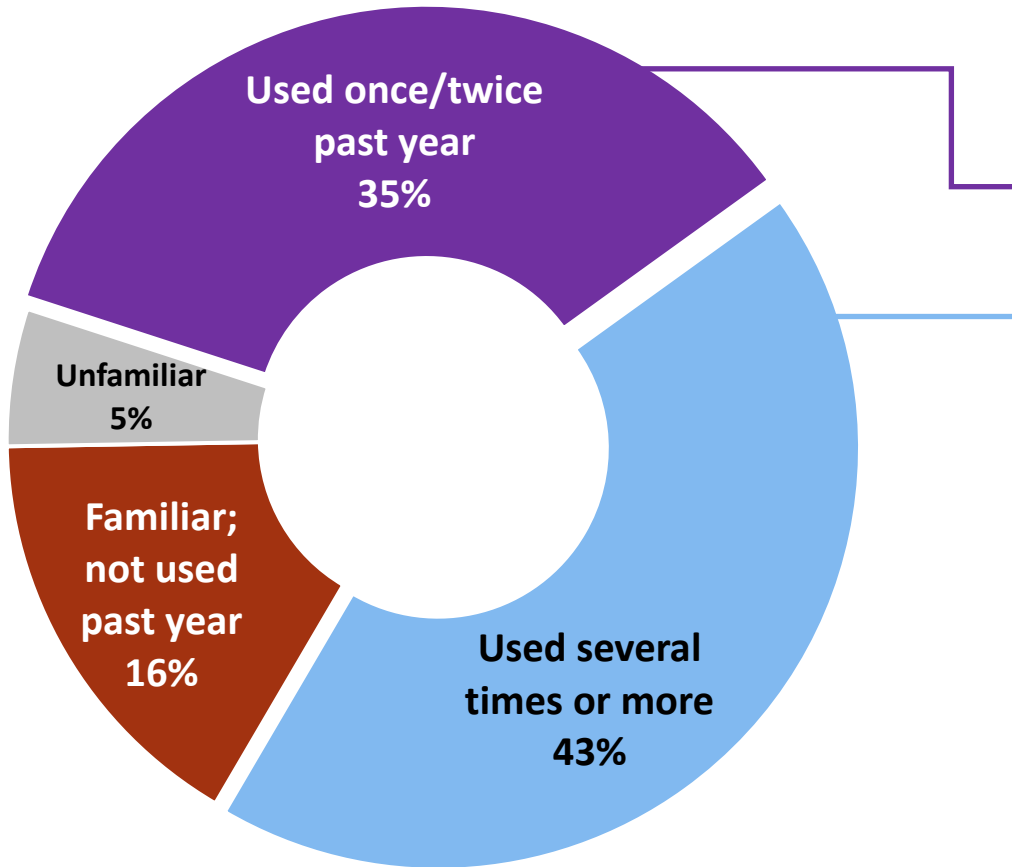
% Who Read an Online Newsletter Weekly or More
(That They Subscribe to/Is Emailed to Them)



70%

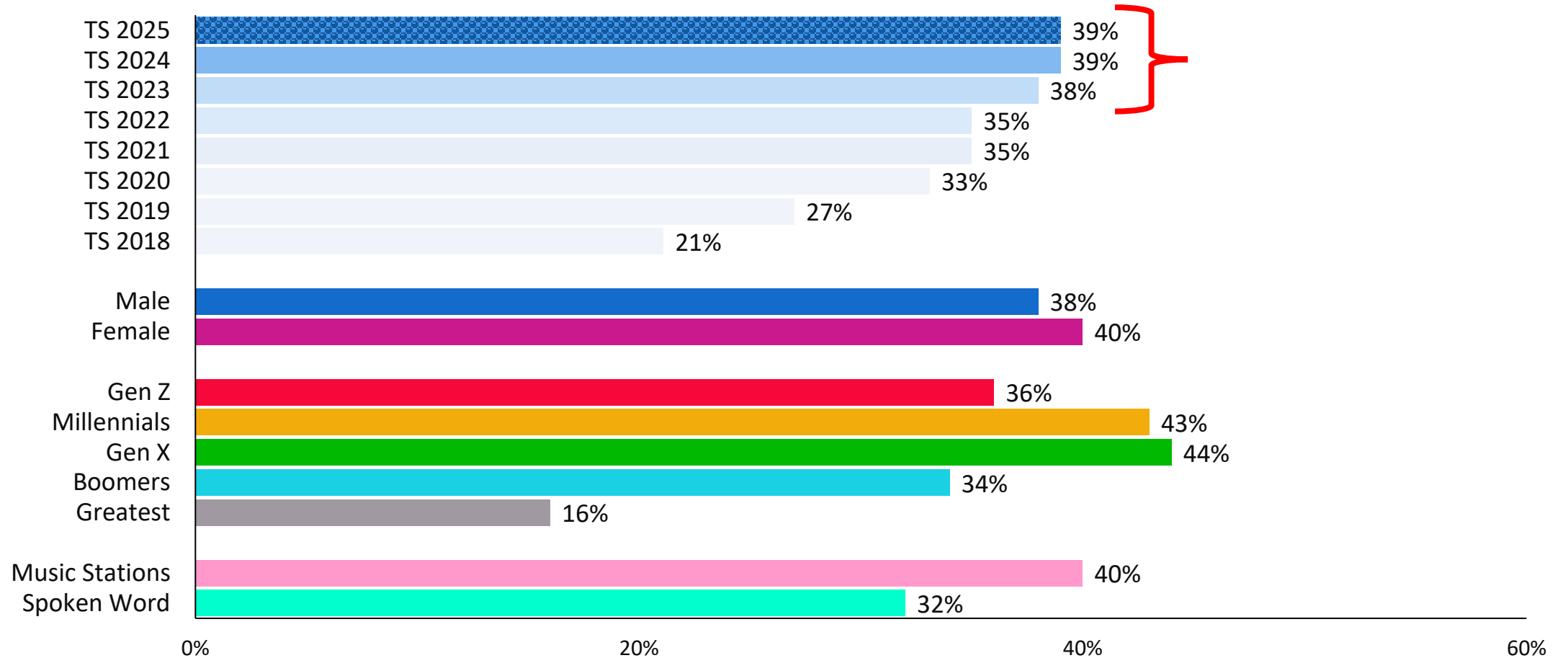
techsurvey public radio 2024

Nearly Four in Five Use QR Codes



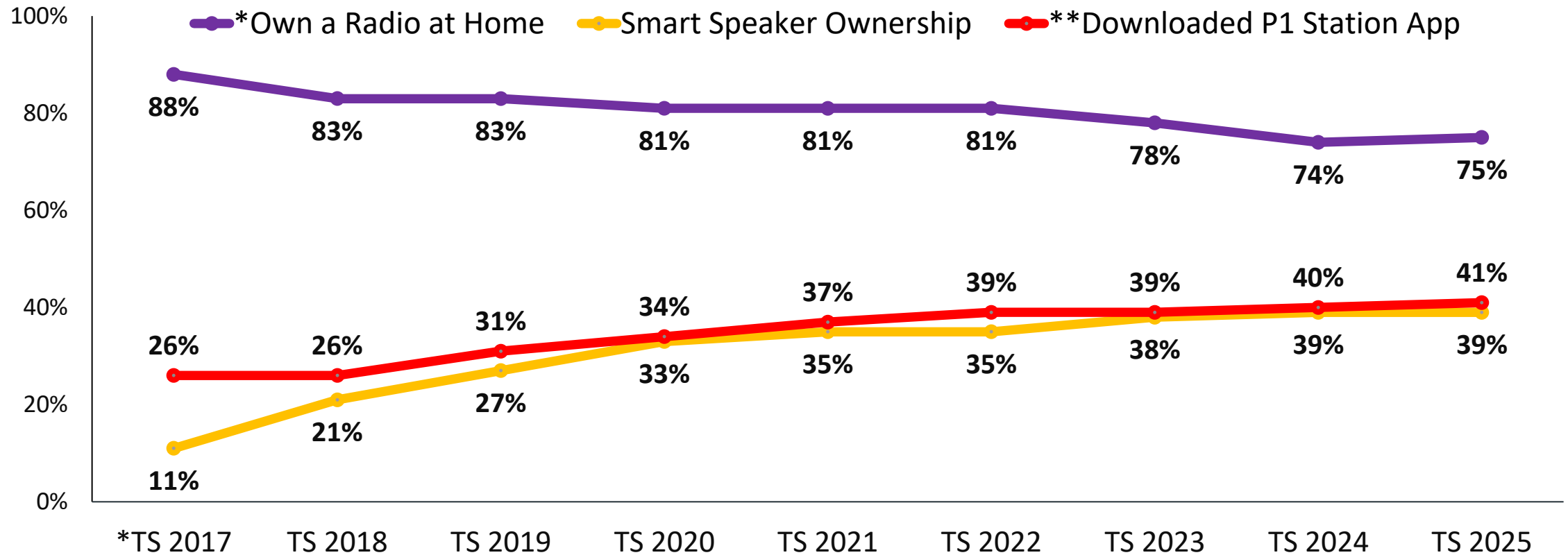
"In the past year, have you used a QR code on a mobile device?"

Smart Speaker Ownership Has Stalled



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

As “Regular Radios” Disappear in Homes, Smart Speakers and Mobile Become Viable Alternatives for Listening to Radio



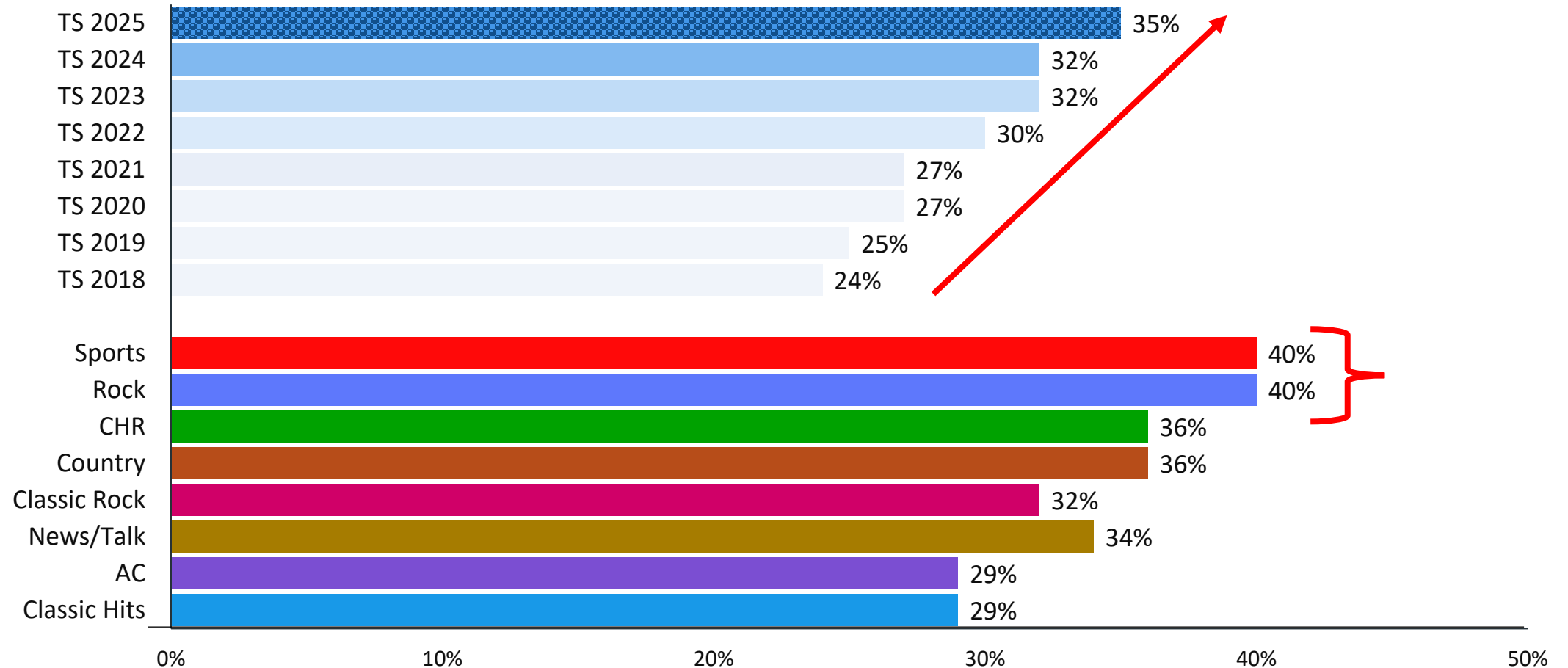
% who own a working radio at home that they use
vs. own a smart speaker vs. have downloaded their P1 station app
(*excluded wording “that you use”; **among smartphone/tablet owners)



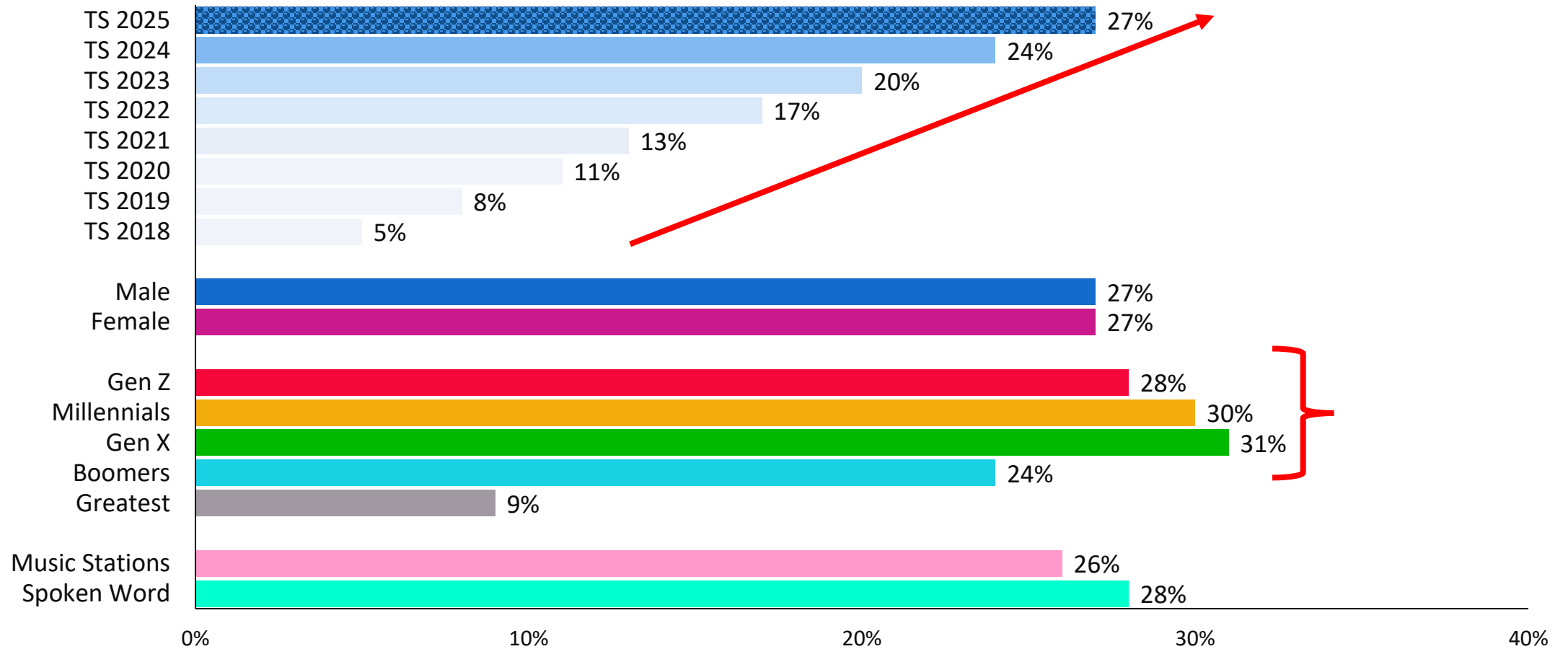
7

More cars have “infotainment” systems, putting pressure on AM/FM radio listening on the road.

In-Car Infotainment Systems Reach An All-Time High

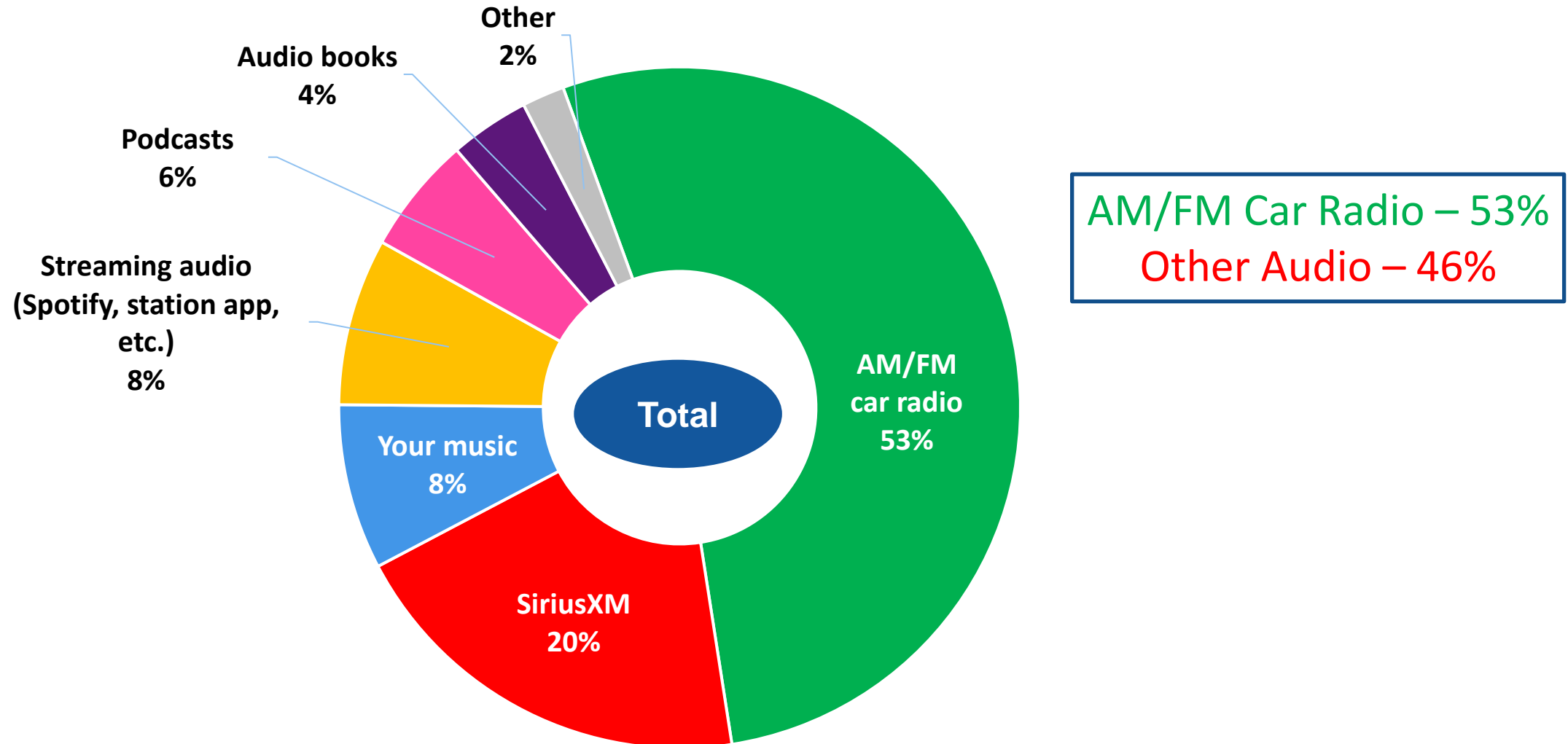


Apple CarPlay's Dashboard Presence Reaches a New High

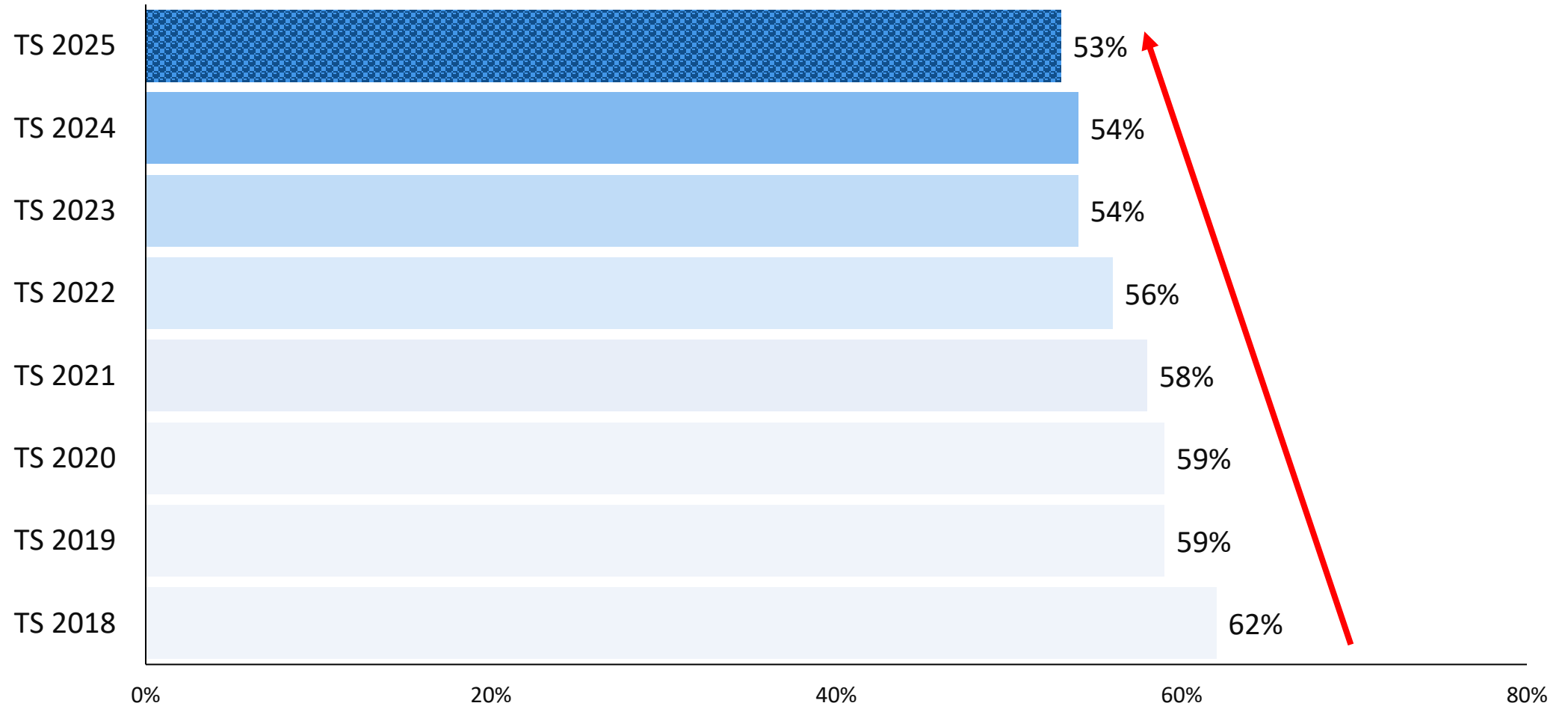


% who have Apple CarPlay in the vehicle they drive/ride in most often

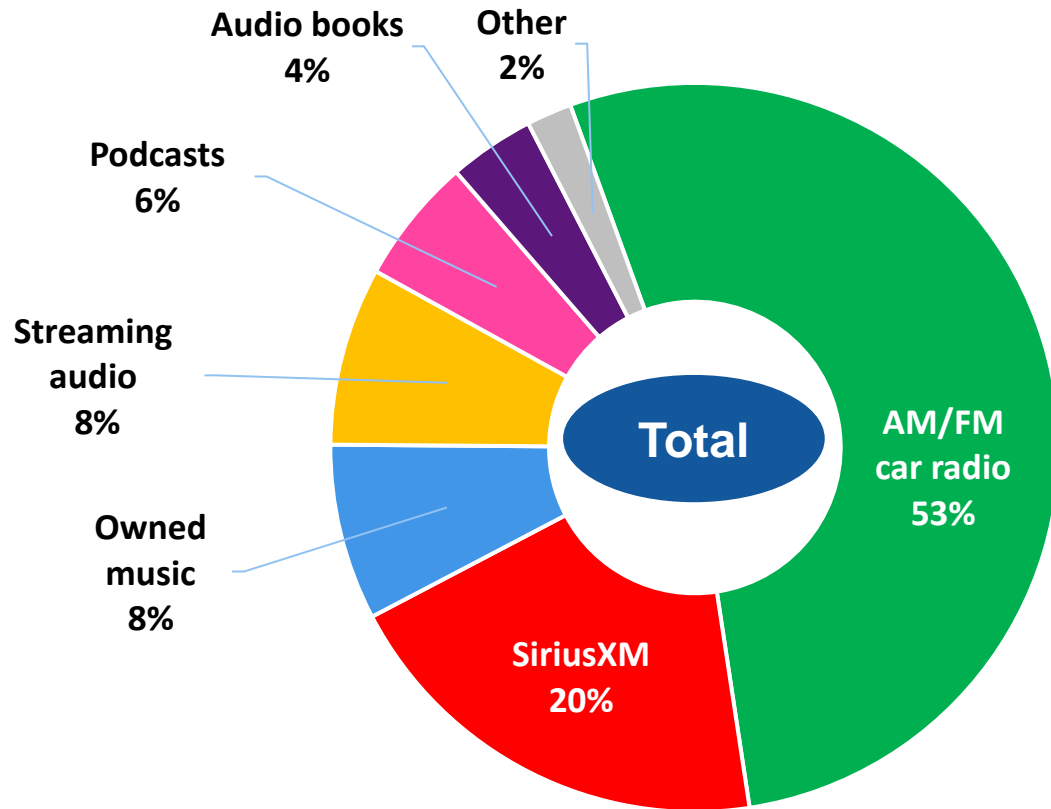
AM/FM Car Radio Still Makes Up the Majority of In-Car Audio Usage



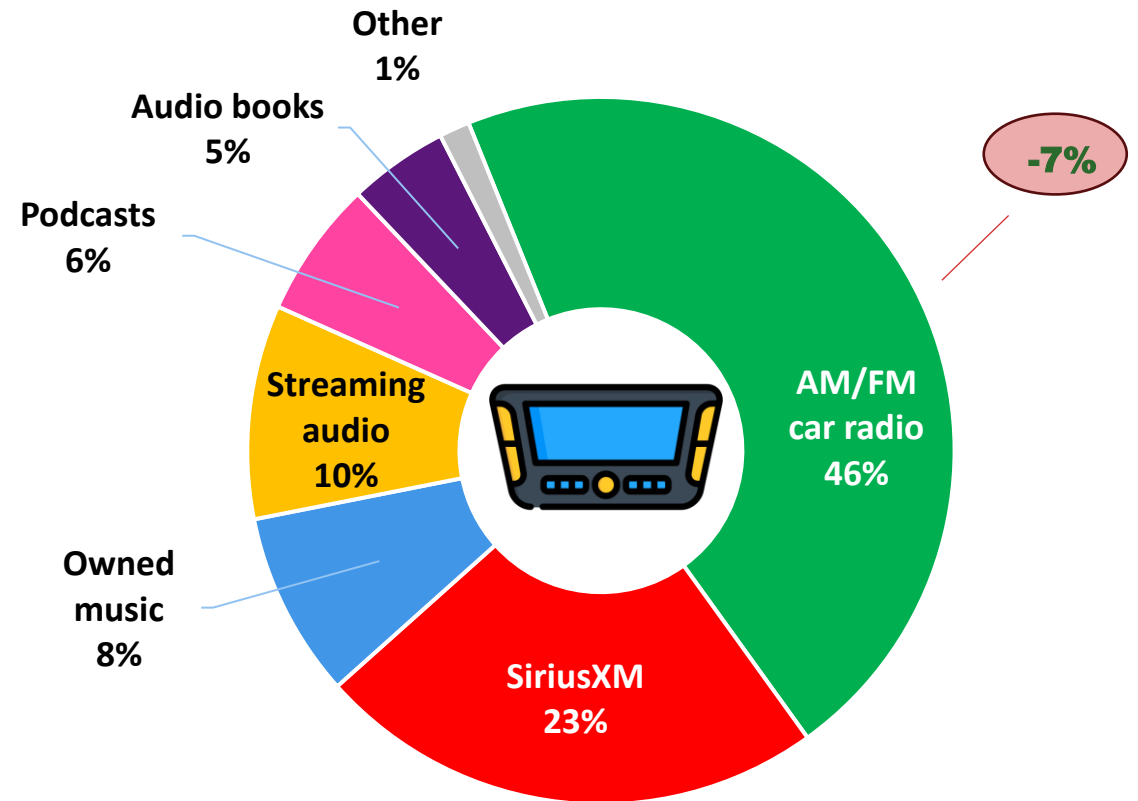
AM/FM Radio Listening in the Car Is Cooling and Losing Its Stronghold



Drivers With Infotainment Systems Listen to Less AM/FM Radio and More to Satellite Radio and Streaming Audio



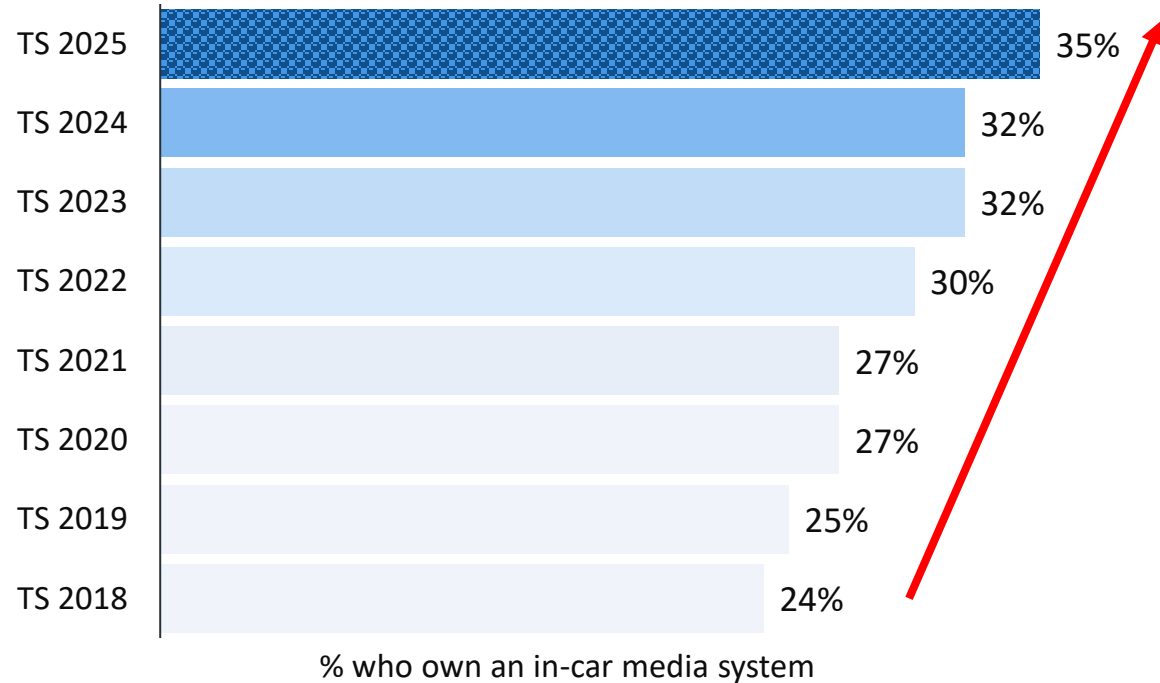
AM/FM Car Radio – 53%
Other Audio – 46%



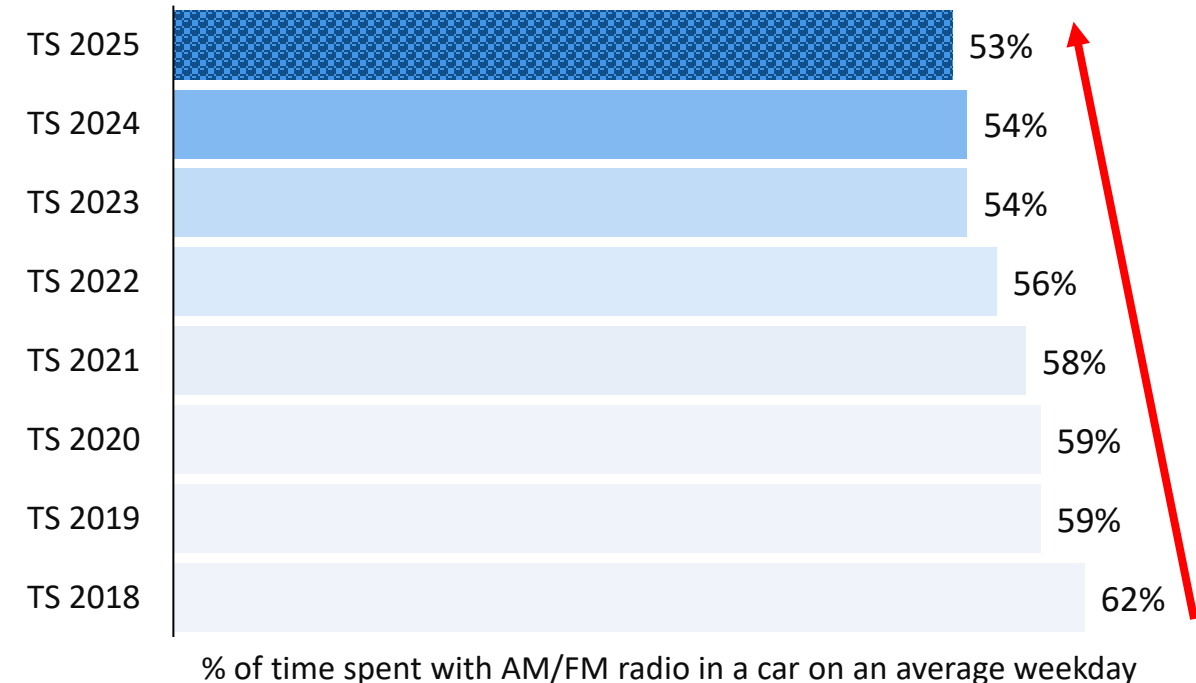
AM/FM Car Radio – 46%
Other Audio – 52%

The Inverse Relationship Between Driving Fully “Connected Cars” and Listening to AM/FM Radio in the Car

In-Car Media System Ownership



In-Car AM/FM Radio Usage

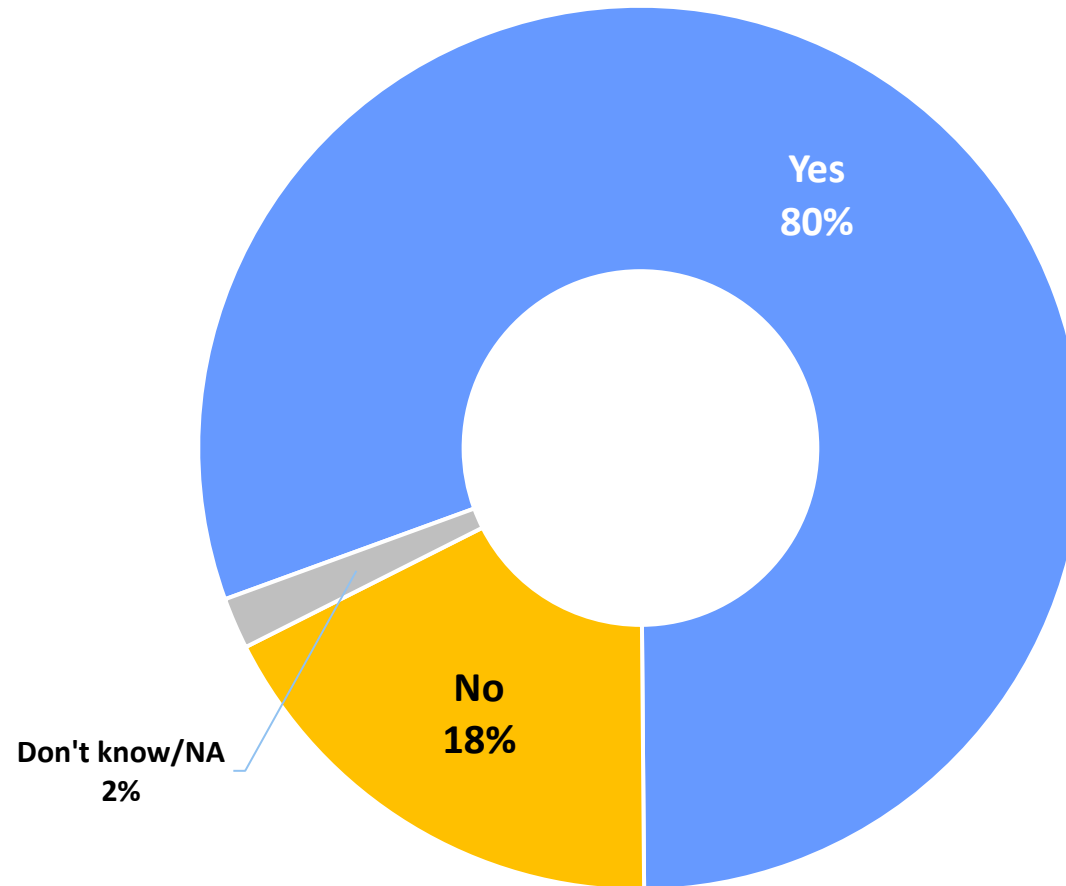




Many drivers are paying attention to dashboard metadata. They also like real-time information about weather, traffic, and news.

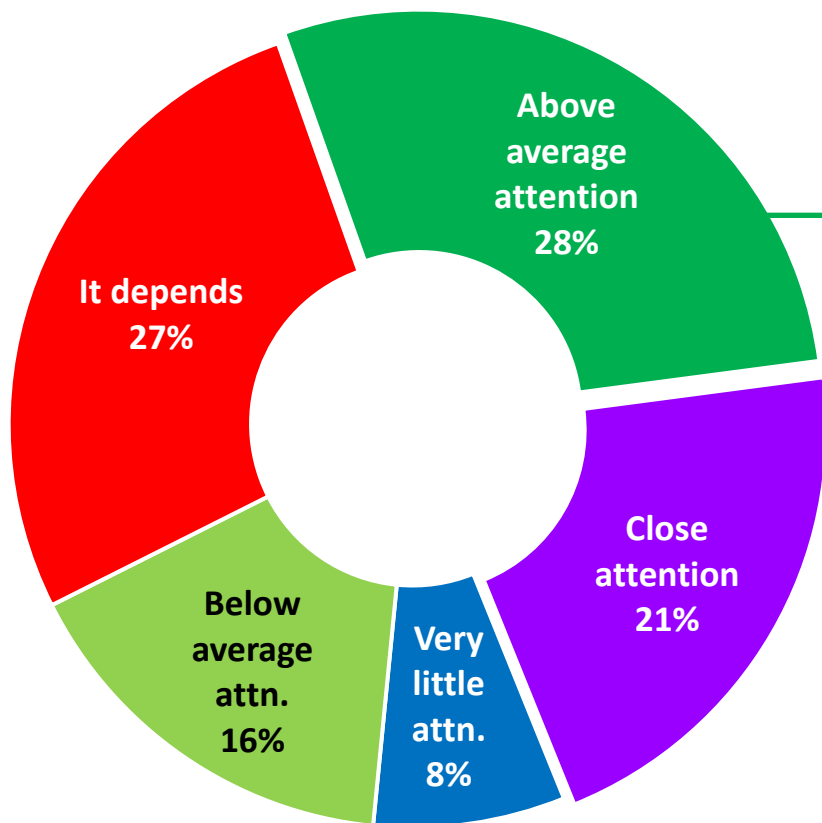
Metadata Matters: Four in Five Own Vehicles With Dashboards Displaying Artist and Title Information

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



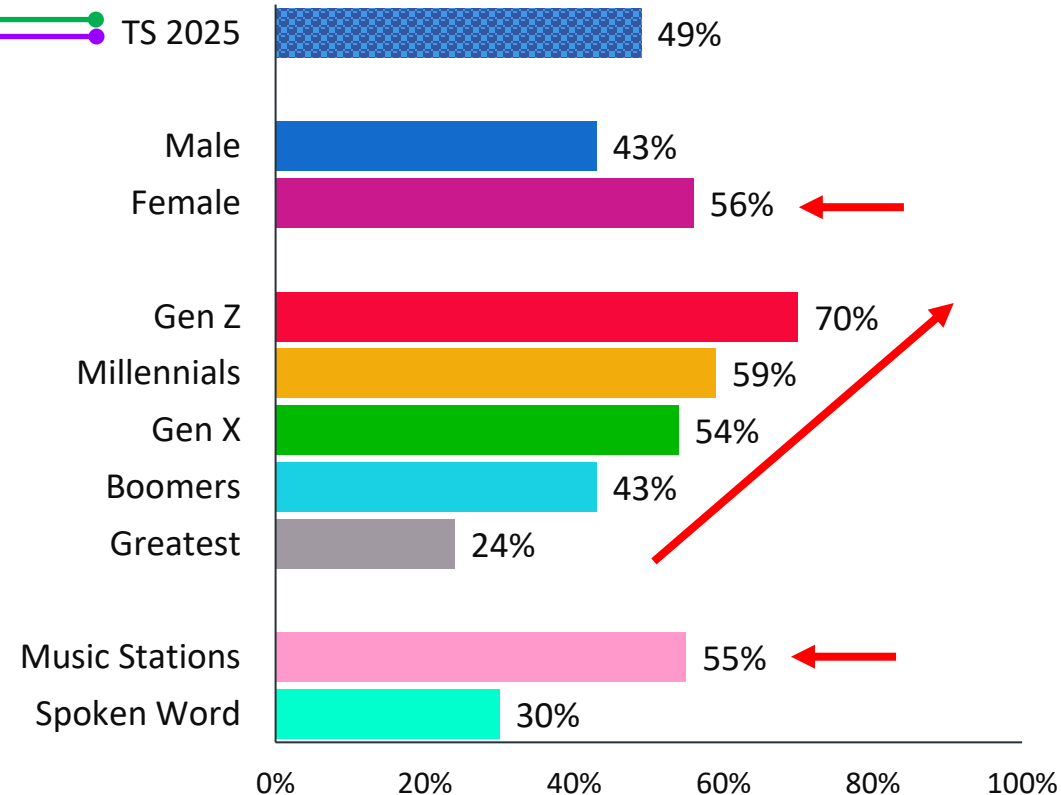
NEW

Nearly Half Say They Pay Close/Above Average Attention to the Dashboard Display, Especially Younger Generations and Music Fans



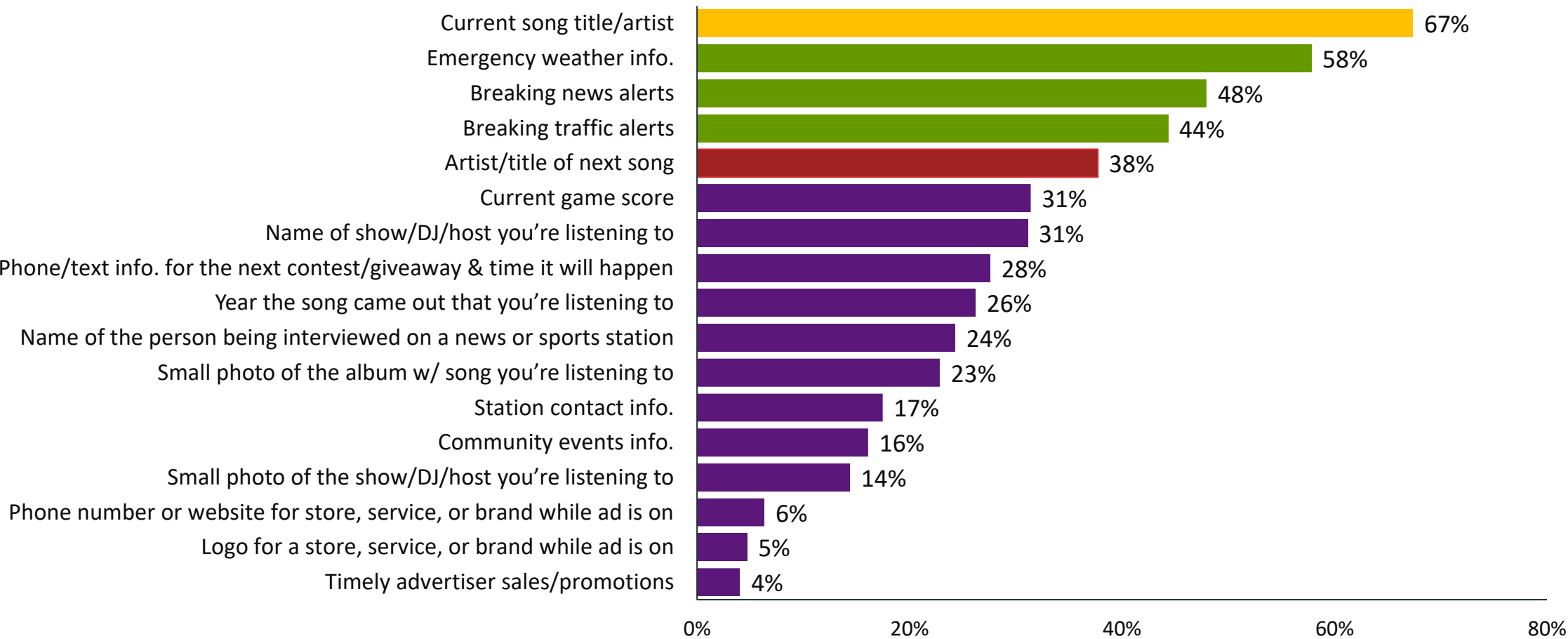
“When your car’s dashboard display shows information about the music or station you’re listening to, how much attention do you typically pay to it?” (1-5 pt. scale)

% Who Say They Pay Close or Above Average Attention to Their Car Dashboard’s Information Display



Among those with car dashboard having the ability to display artist/title info.

While Artist/Title Is Expected, Emergency and Real-Time Alerts Are of Primary Interest in Car Dashboard Displays

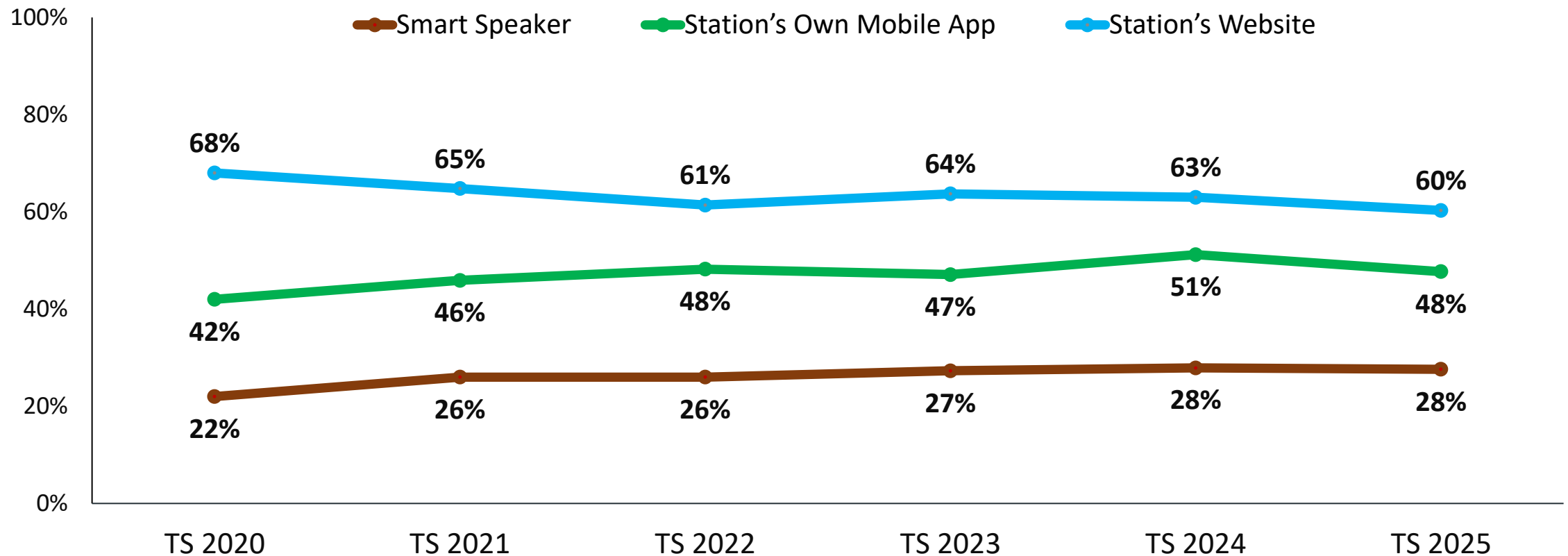


Among those with car dashboard having the ability to display artist/title info., % “very interested” in each element



Mobile continues to play an even greater role in streaming audio. It's the “Forrest Gump” of gadgets.

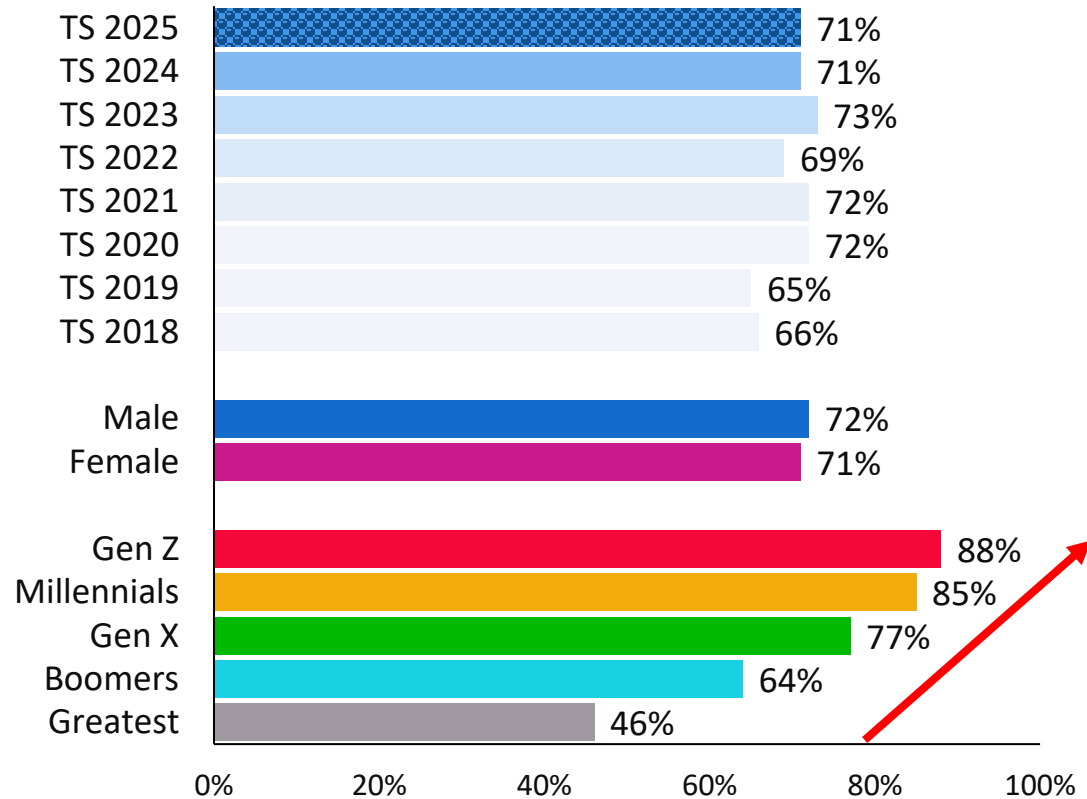
How Do Listeners Stream Their P1 Stations? Mobile Apps Continue Their Solid #2 Position Behind Websites



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)

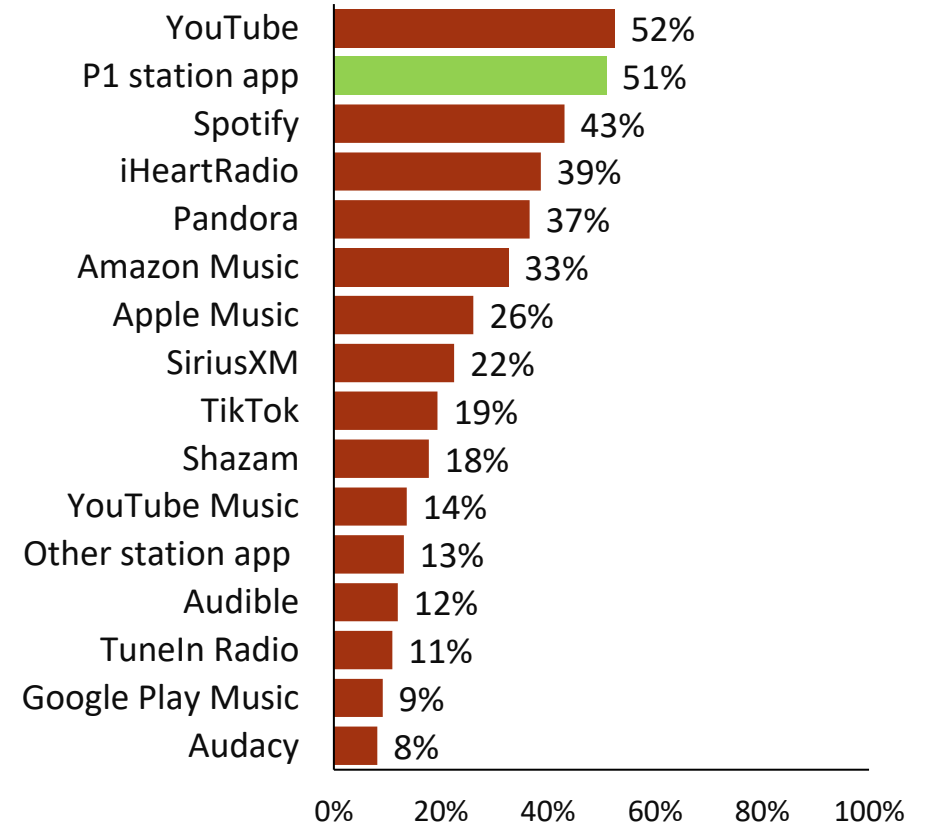
Seven in Ten Have Downloaded Radio/Music Apps; YouTube and P1 Station App Downloads Lead

% Who Have Downloaded a Radio/Music App



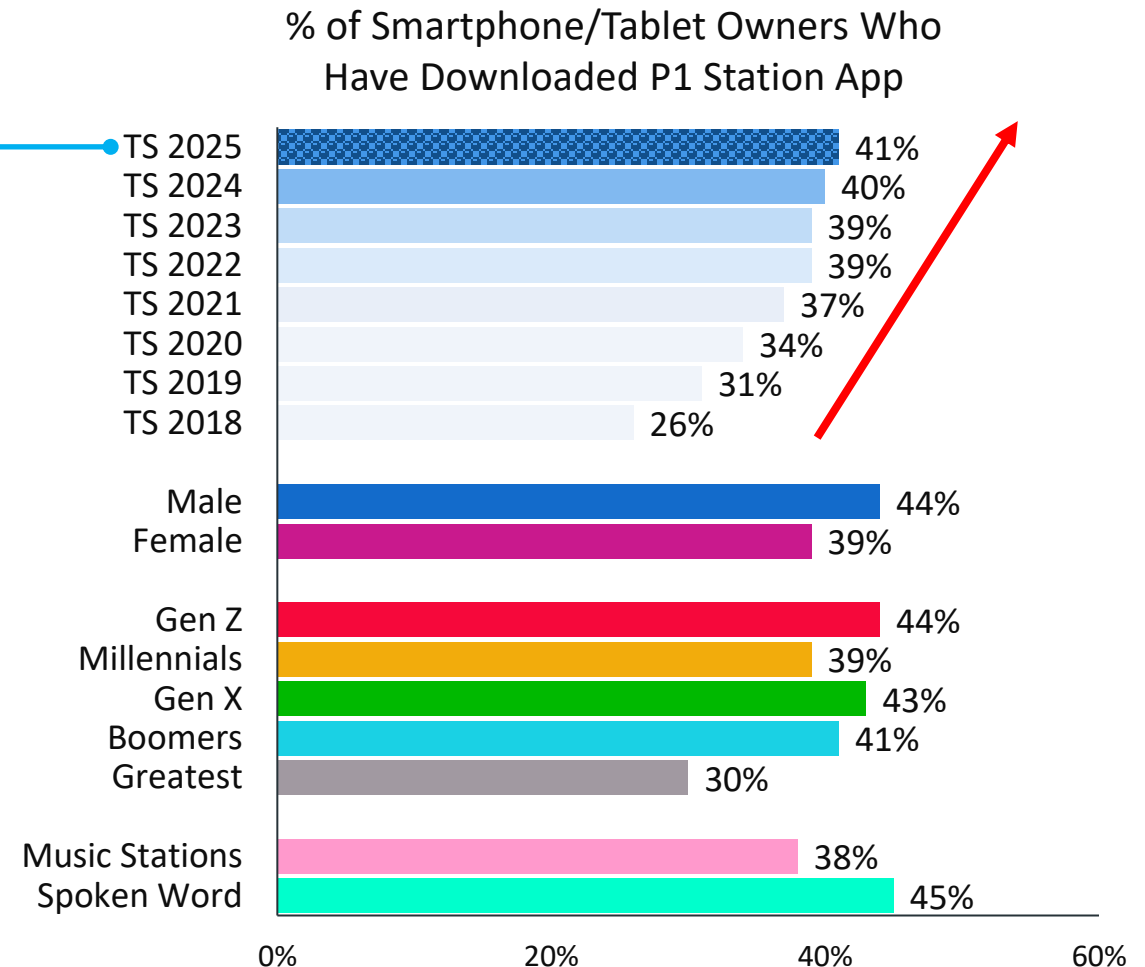
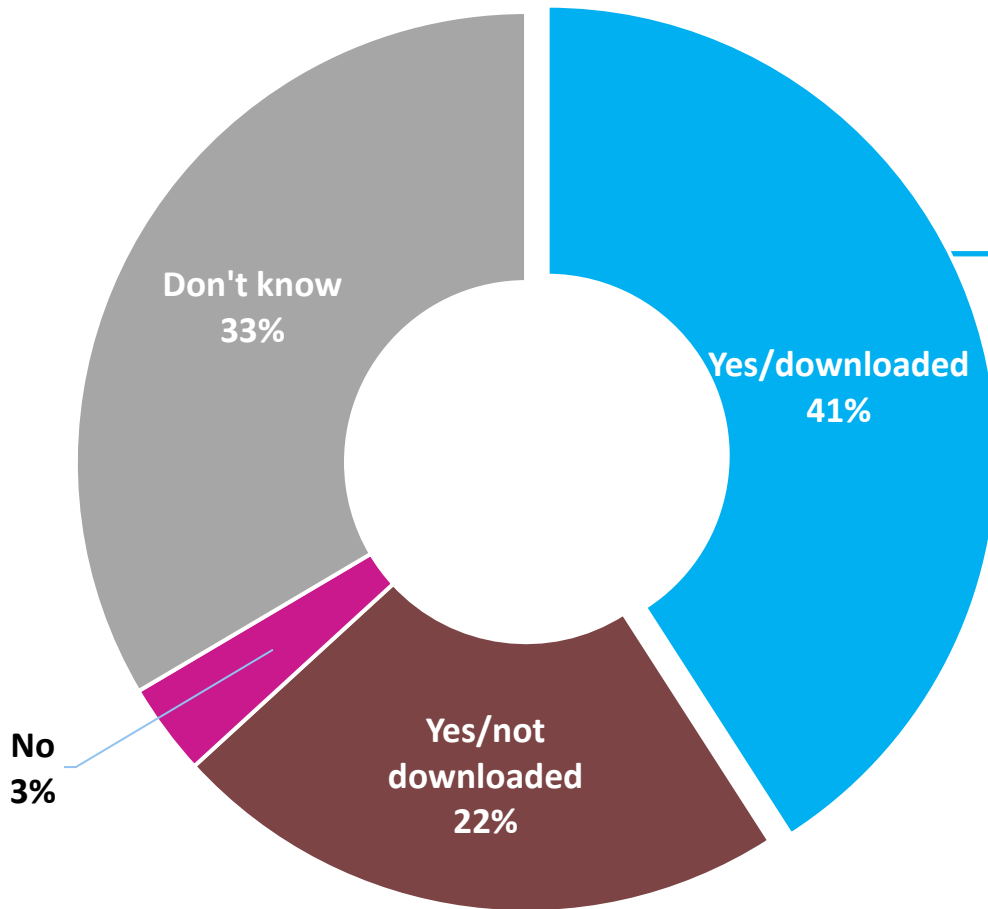
Among smartphone and/or tablet owners

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

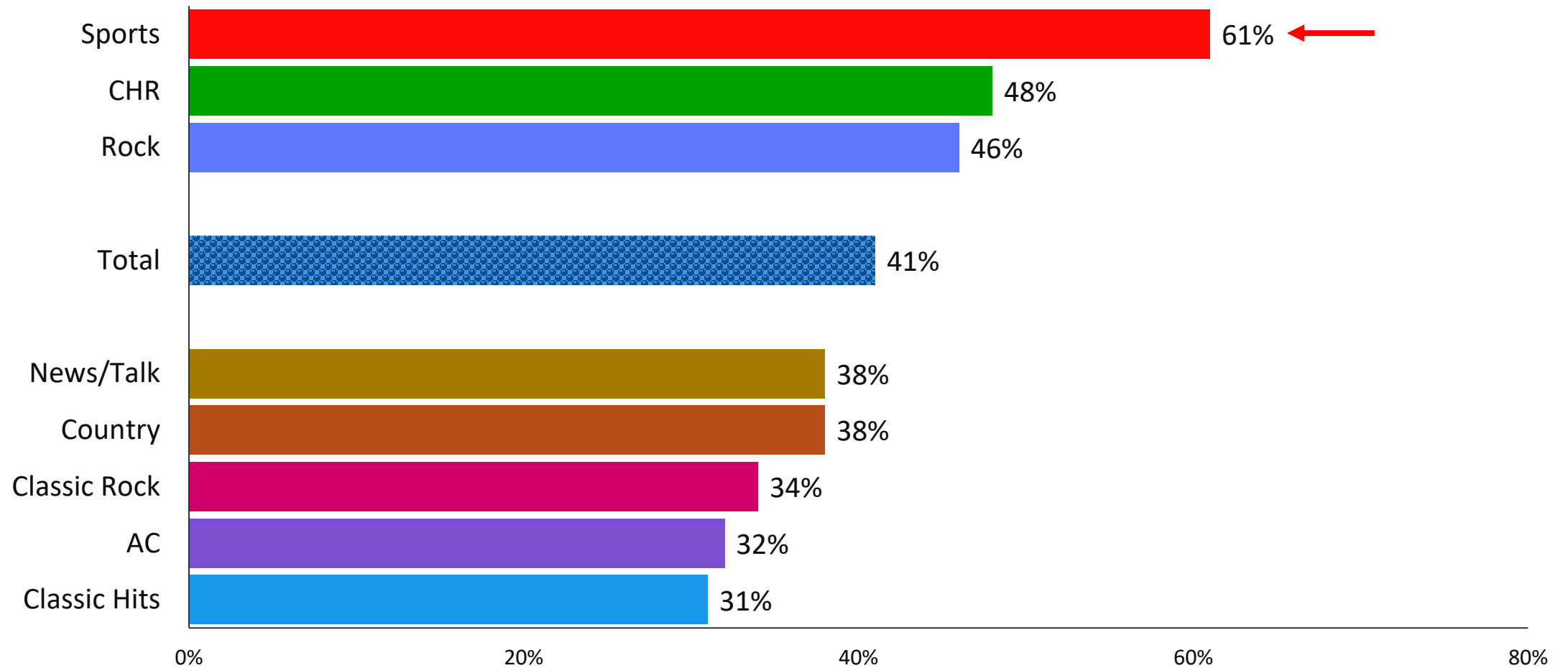


Among those who have downloaded a radio/music app
(apps 6% and higher shown)

Four in Ten Have Now Downloaded Their P1 Station's App

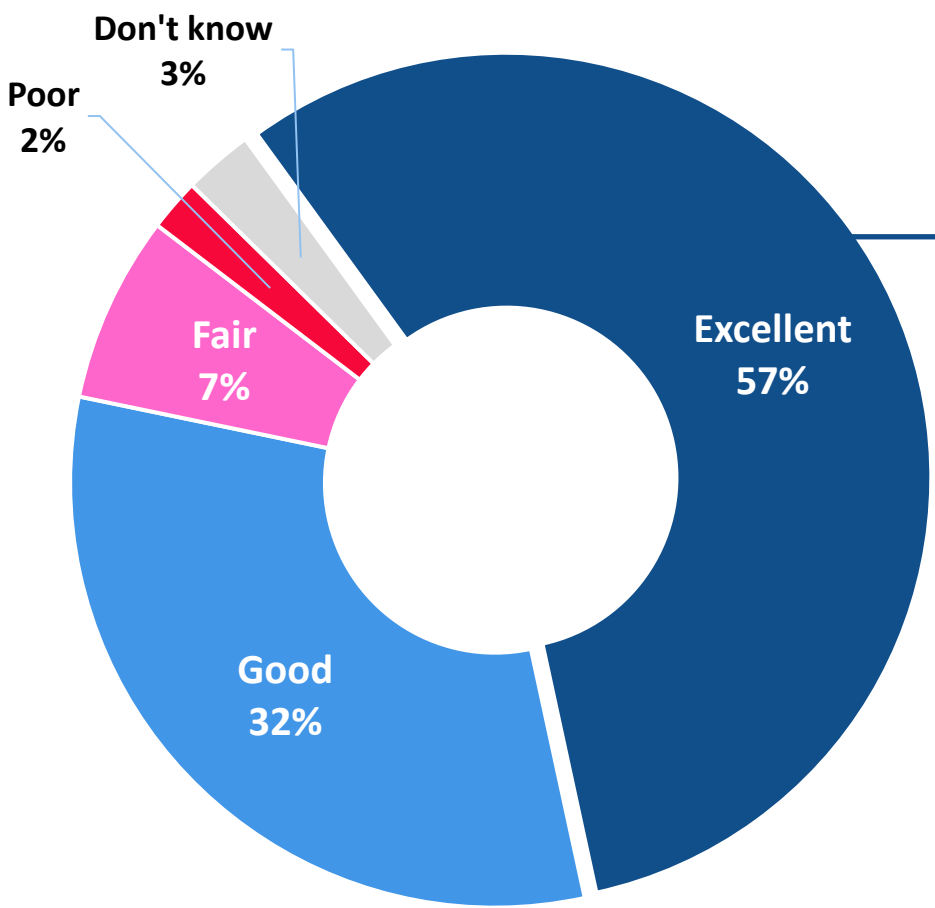


Sports Radio Fans Are Especially Likely to Have Downloaded Their P1 Station's App

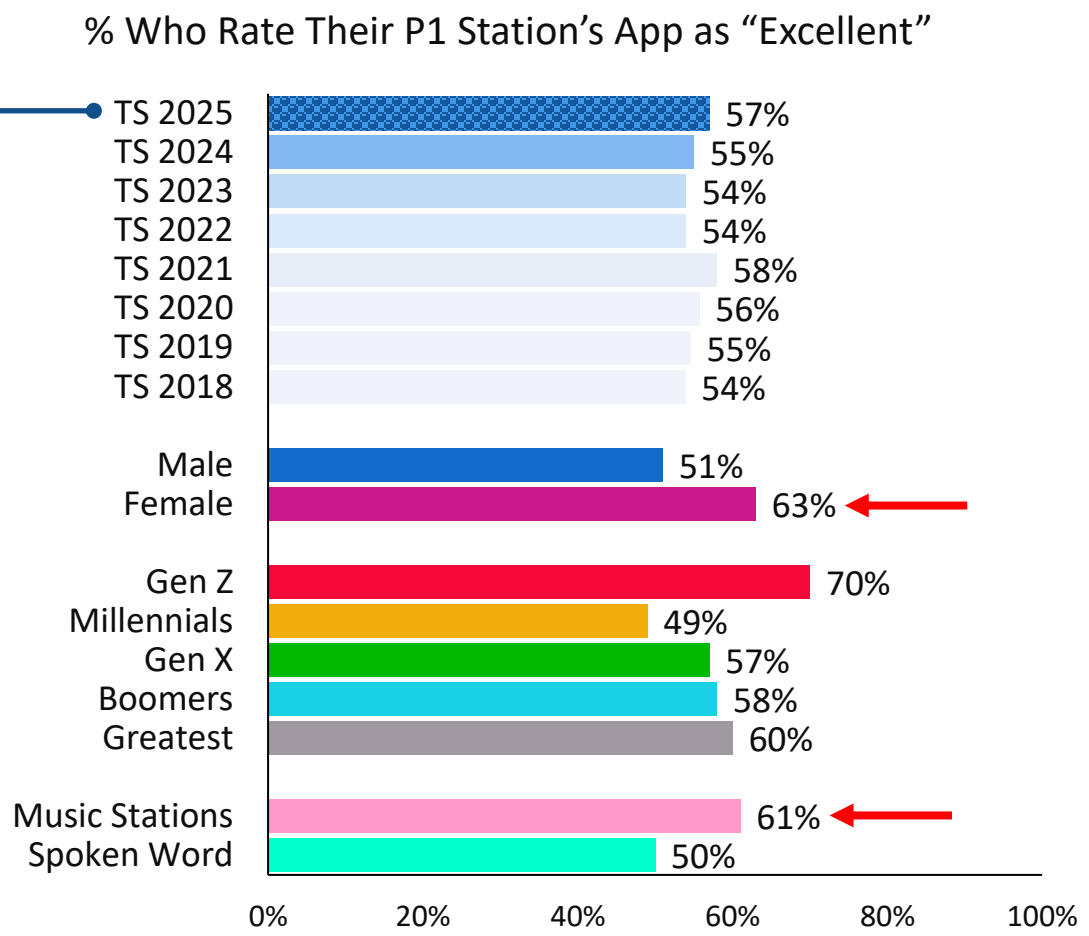


% by format, of smartphone/tablet owners who
have downloaded P1 station app

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

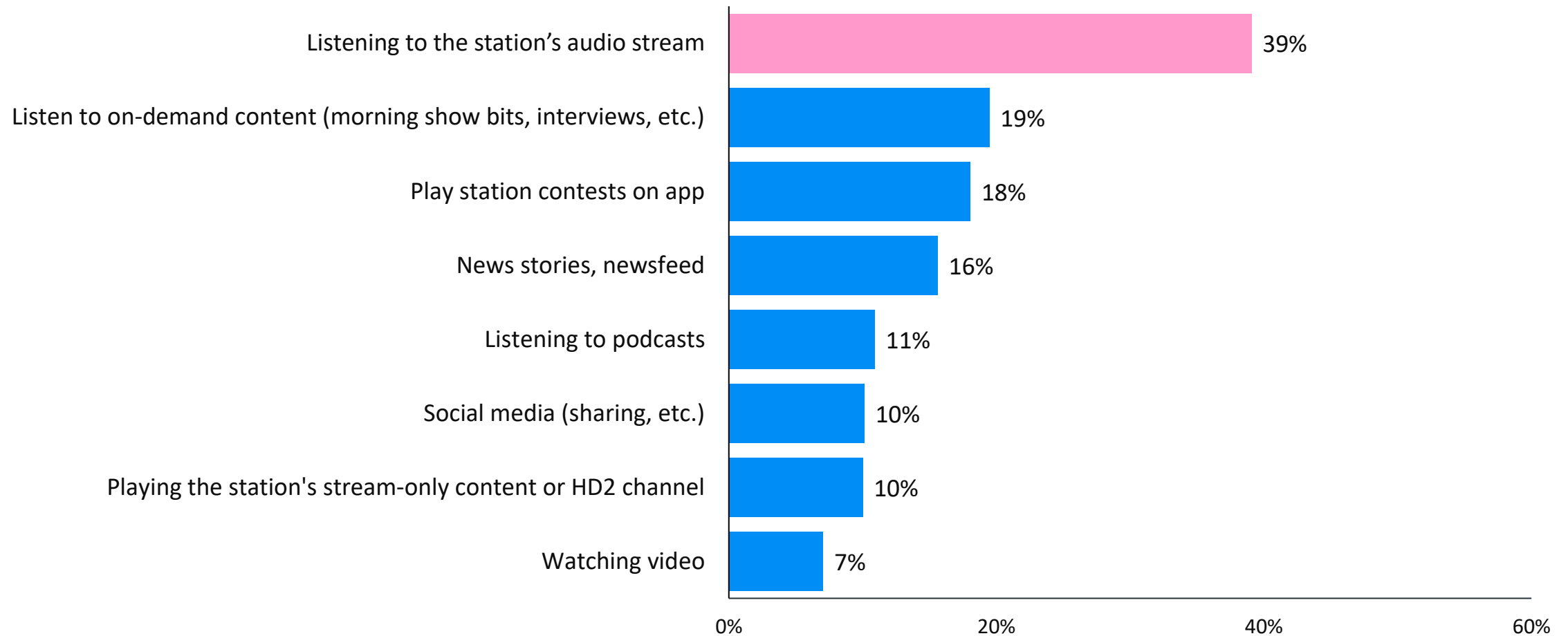


“Overall, how would you rate THE STATION THAT SENT YOU THIS SURVEY’S app?”

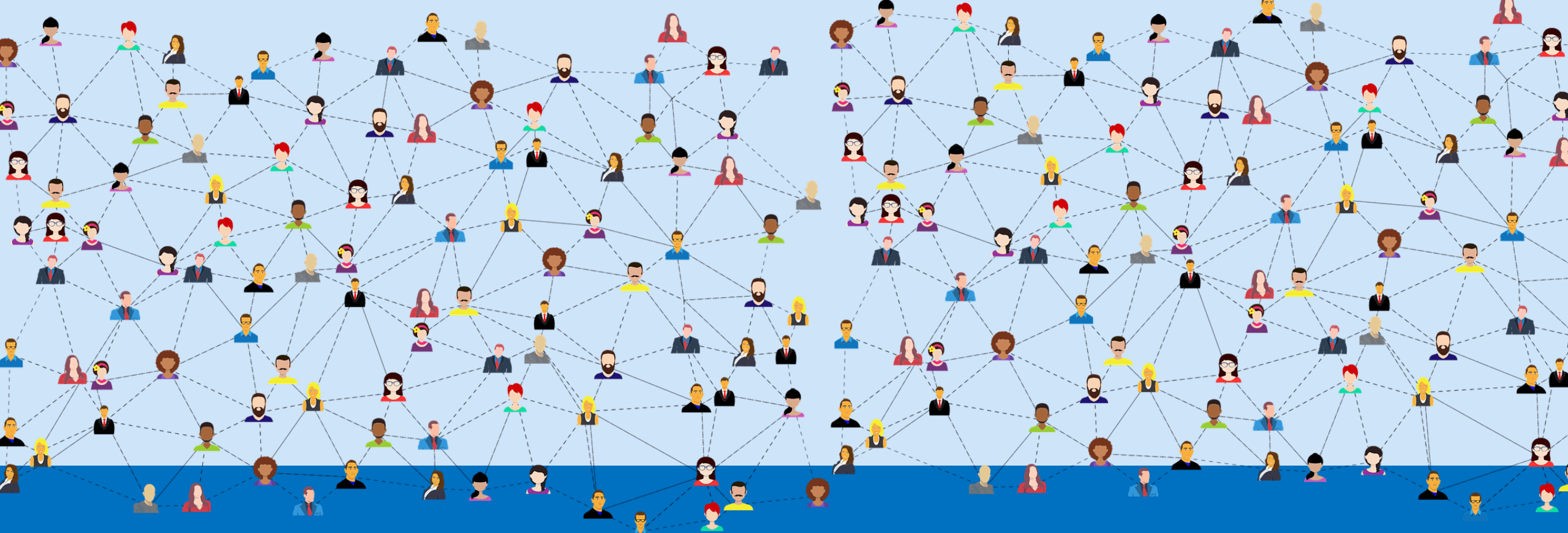


Among smartphone and/or tablet owners who have downloaded their P1 station's app

By Far, Listening to the Station's Audio Stream Is the Most-Used Feature on the P1 Station's Mobile App



Among those who have downloaded their P1 station's mobile app,
% who "frequently" use each feature (multiple responses accepted)



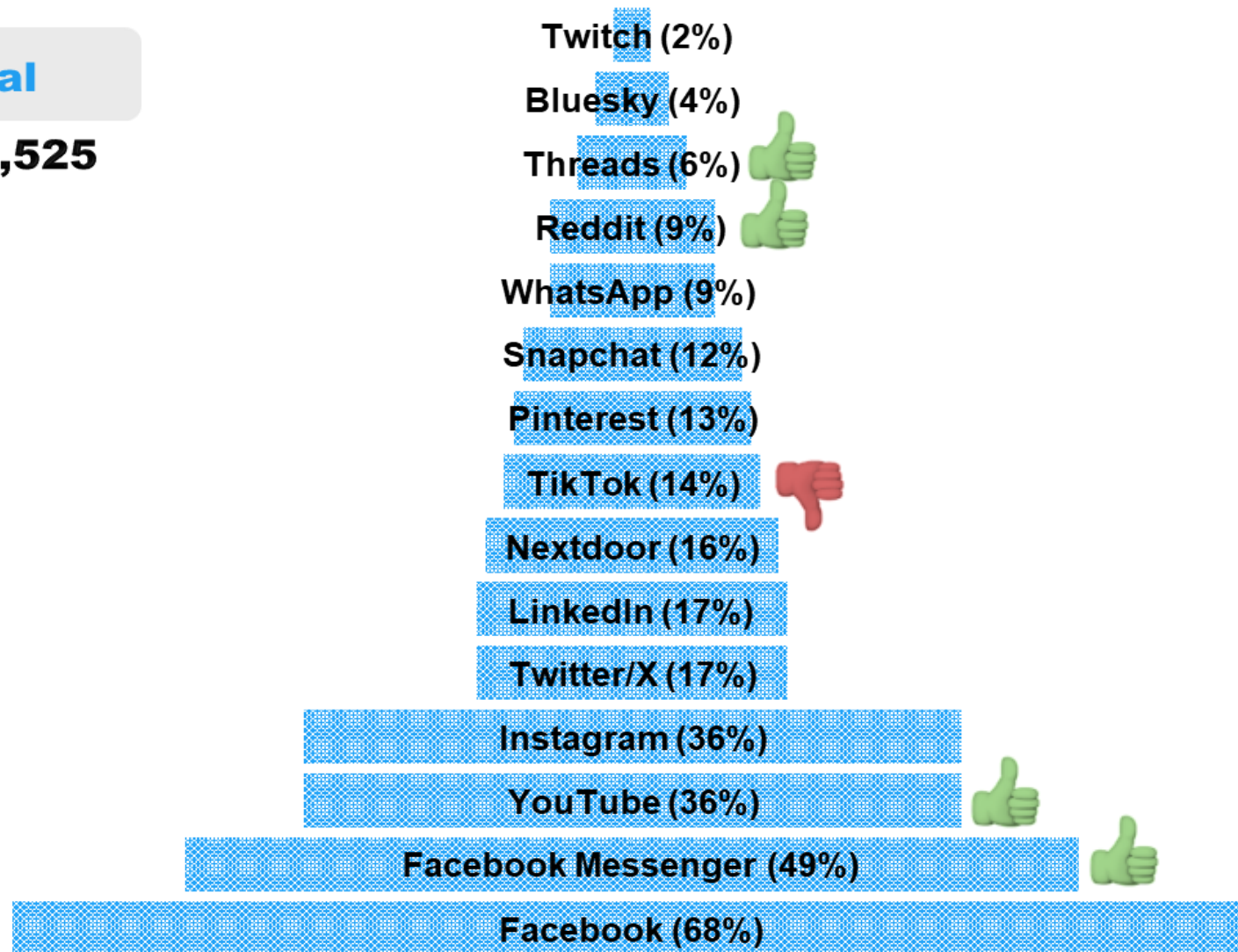
Social media is expanding its impact, emerging as a key source of news, while driving purchases in the influencer economy.



Social Media Brand Pyramid 2025

Total

N = 24,525



**Total
TS 2024**

2%

4%

7%

9%

12%

14%

16%

16%

17%

18%

36%

34%

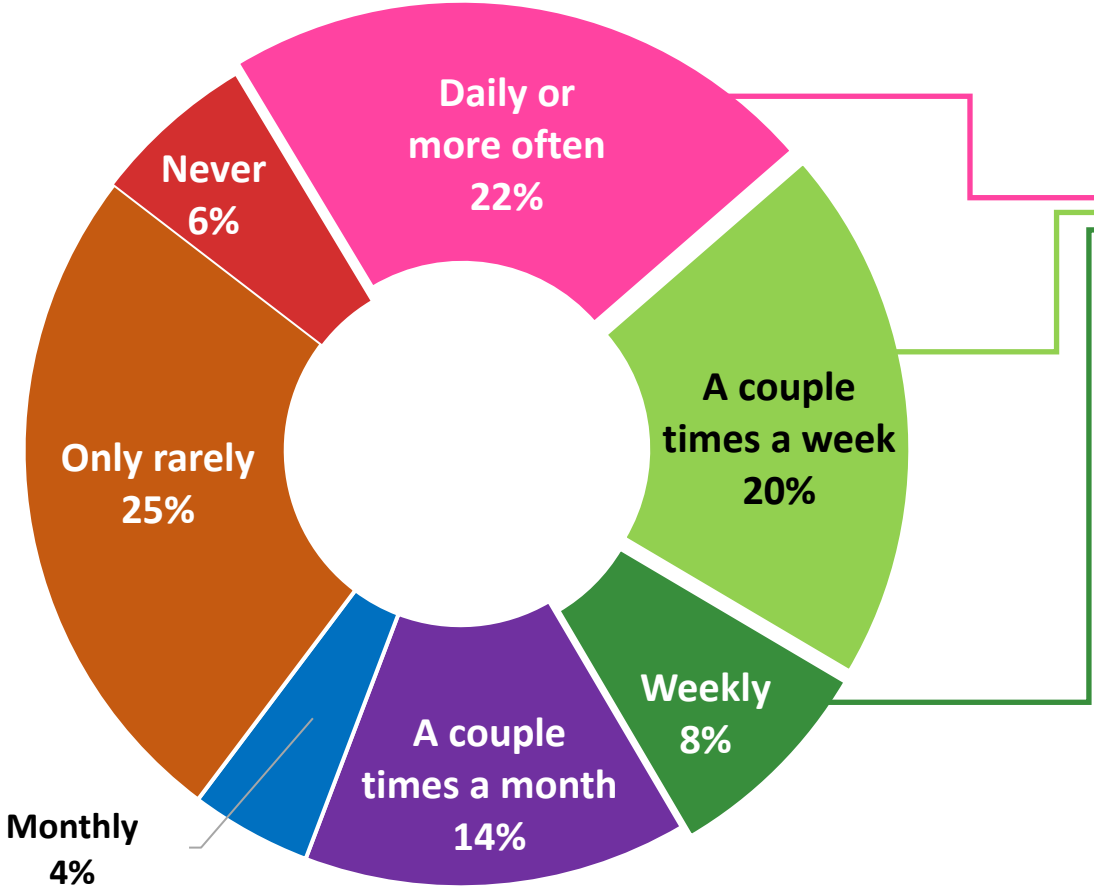
47%

67%

All social media platforms show weekly use

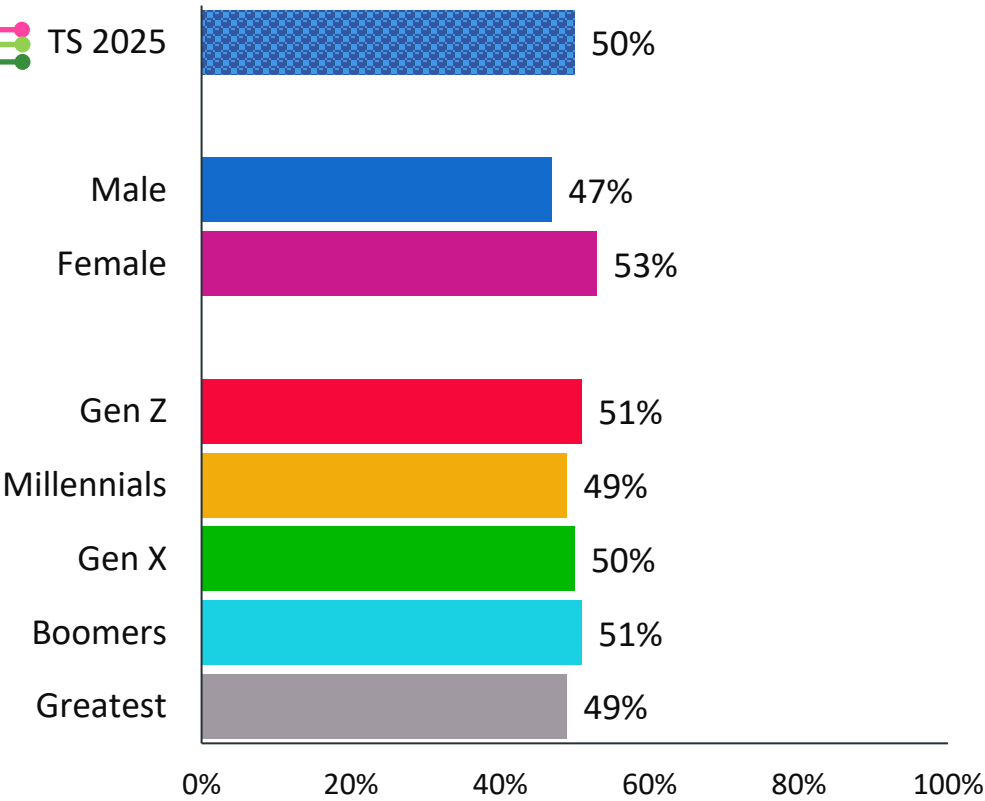
NEW

Half of Social Media Users Post Comments and/or Any Kind of Content on Social Media at Least Weekly



"How often do you actually post any kind of comment or content (not a 'like') on any of your social media accounts?"

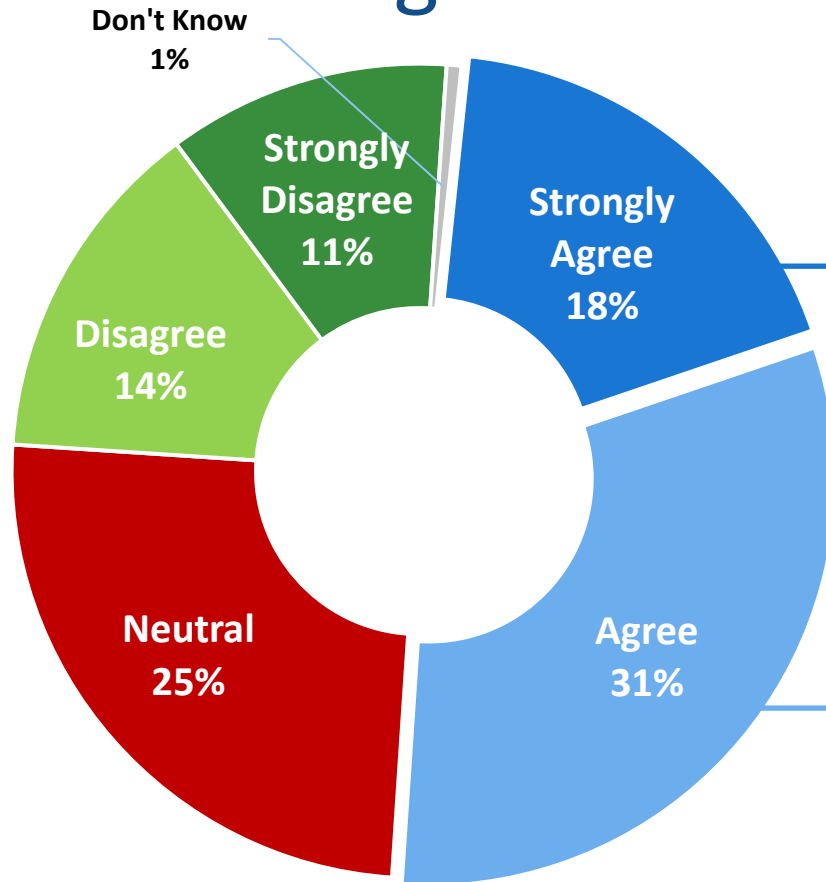
% Who Post Comments / Any Kind of Content (Other Than "Likes") on Social Media at Least Weekly



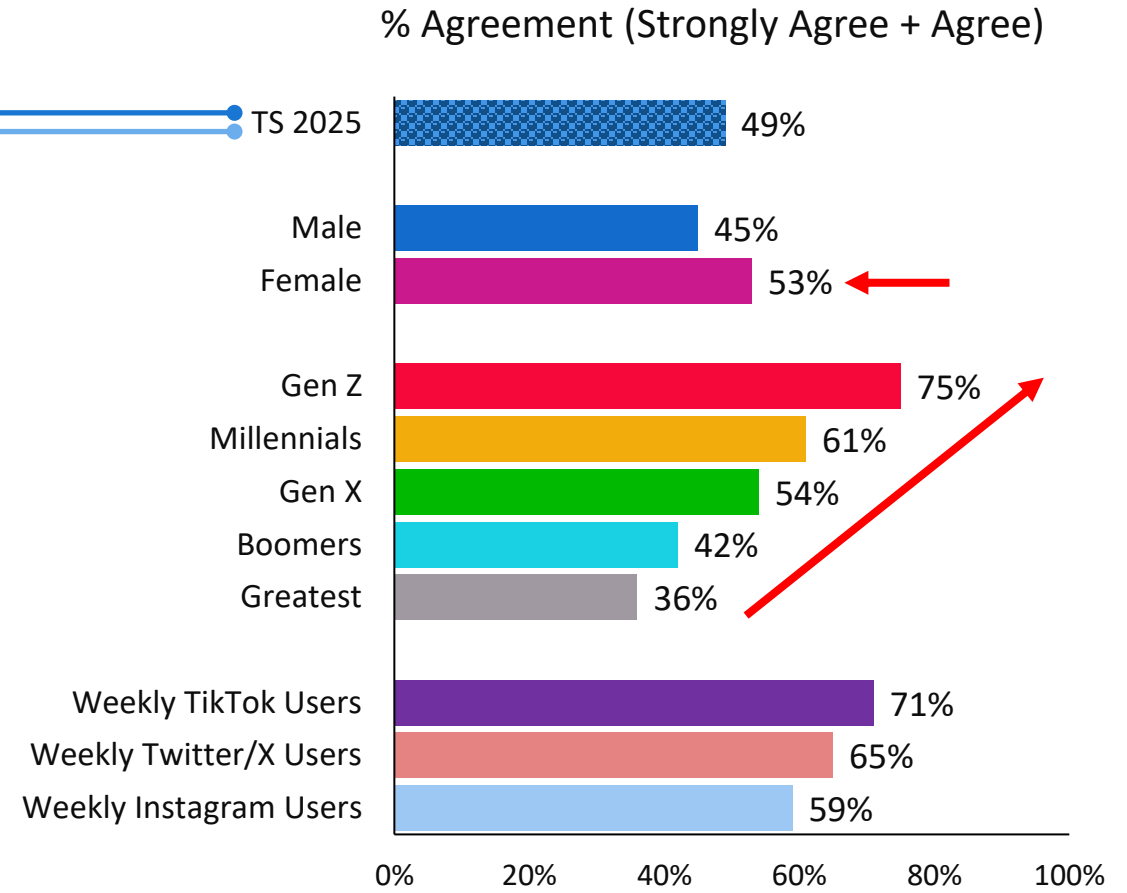
Among those with any social media profile

NEW

Half of Social Media Users Say They Are Using These Platforms More Often For News



"More and more, I'm using social media to read about/discover news stories"

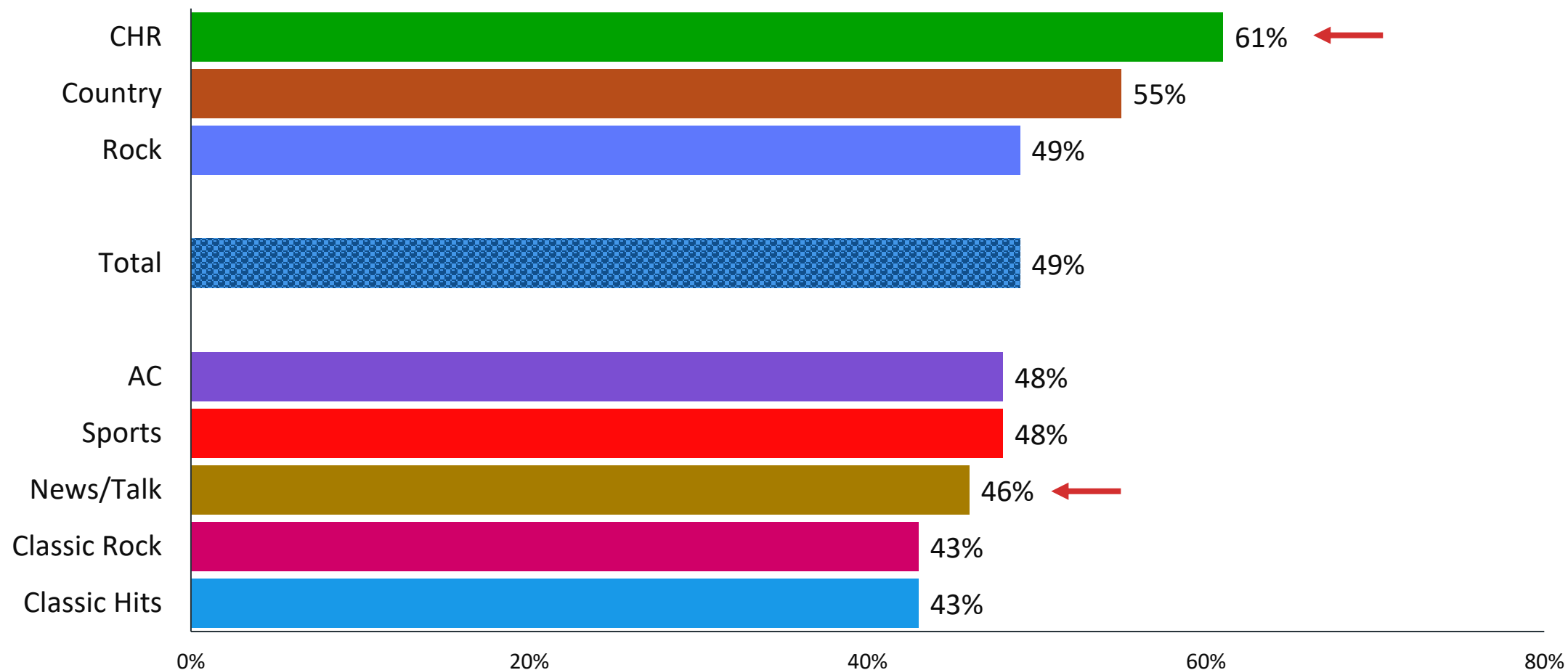


Among those with any social media profile



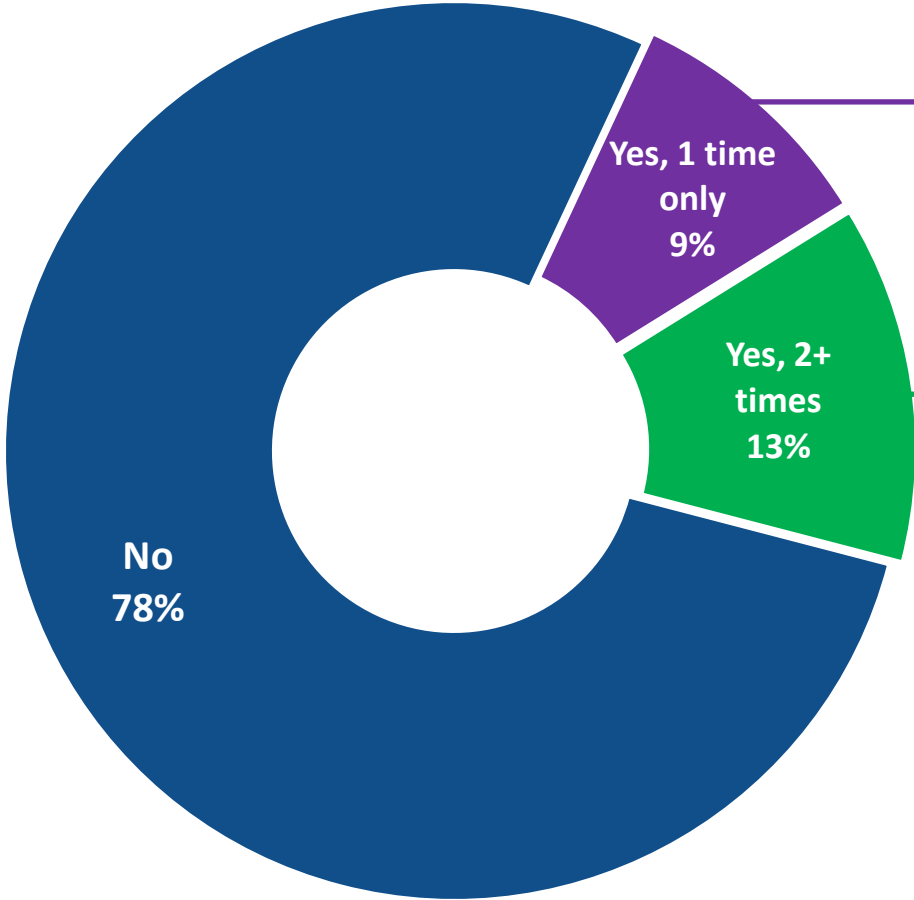
CHR Fans Are Most Apt To Use Social Media More Often For News/News Discovery

“More and More, I’m Using Social Media to Read About/Discover News Stories”

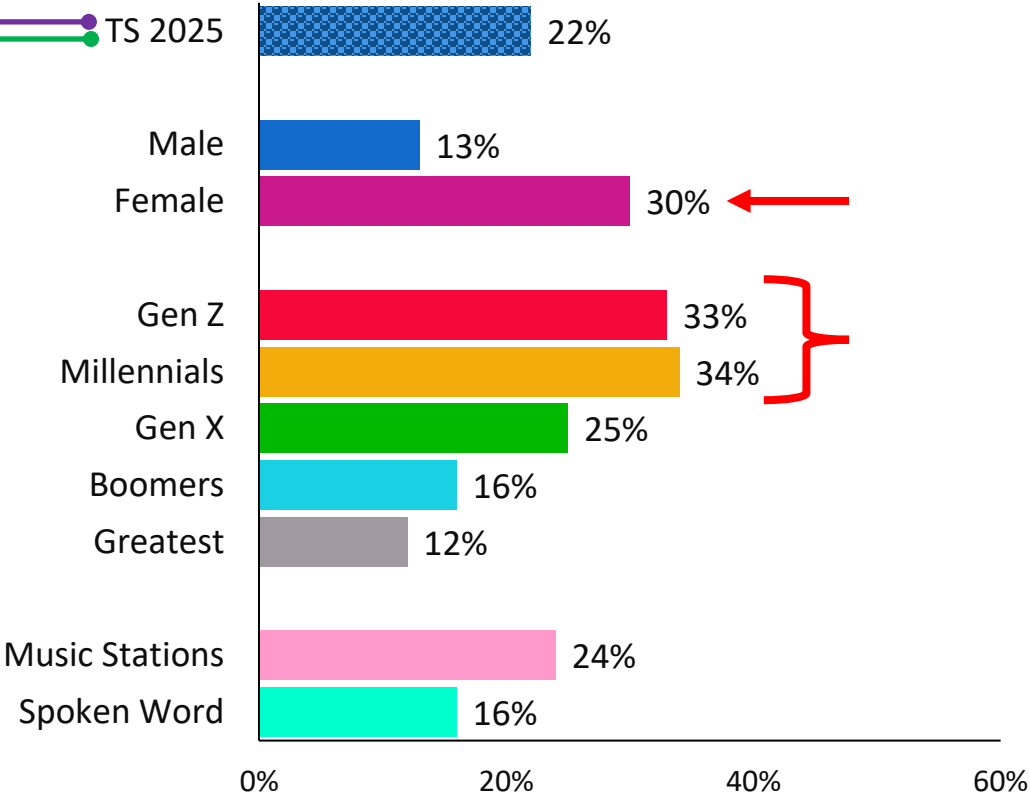


NEW

Women and Young Generations Are Most Apt to Have Made a Purchase Based on Social Media Influencer Recommendations



% Who Have Made a Purchase From Social Media Site Based on An Influencer Recommendation



“In the past year, have you made a purchase from a social media site based on a recommendation from an ‘influencer?’”

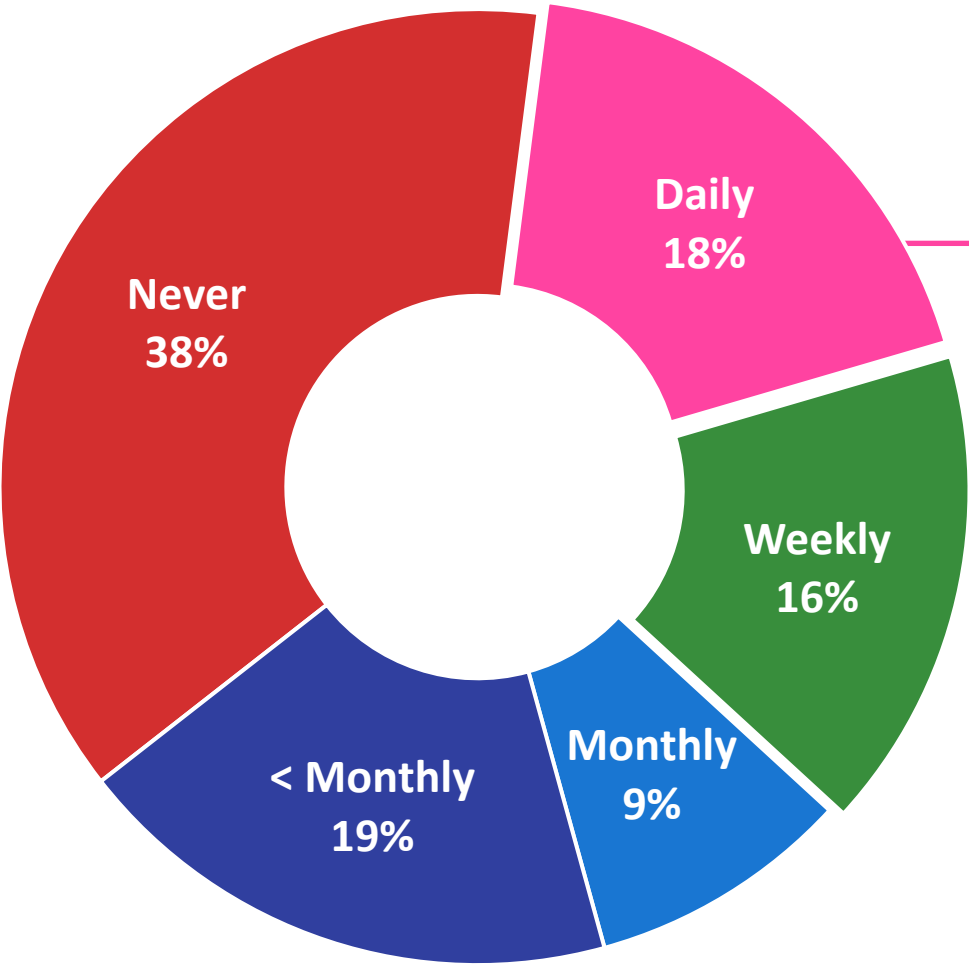
Among those with any social media profile

10

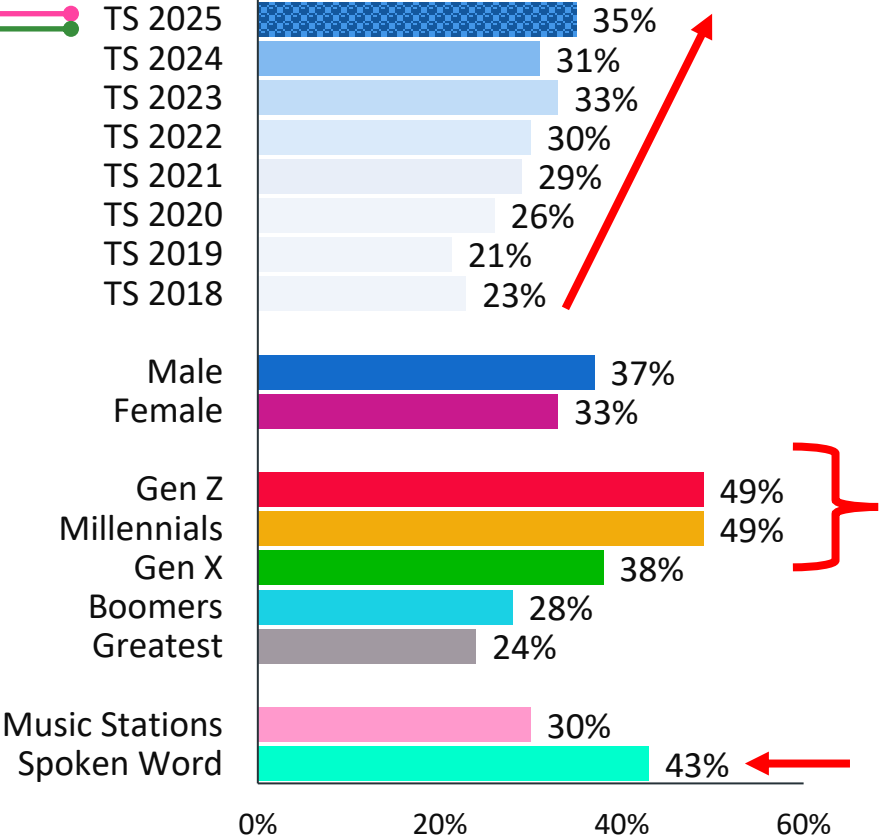
Podcasting's reach among radio fans hits an all-time high, while video versions of podcasts are growing in popularity.



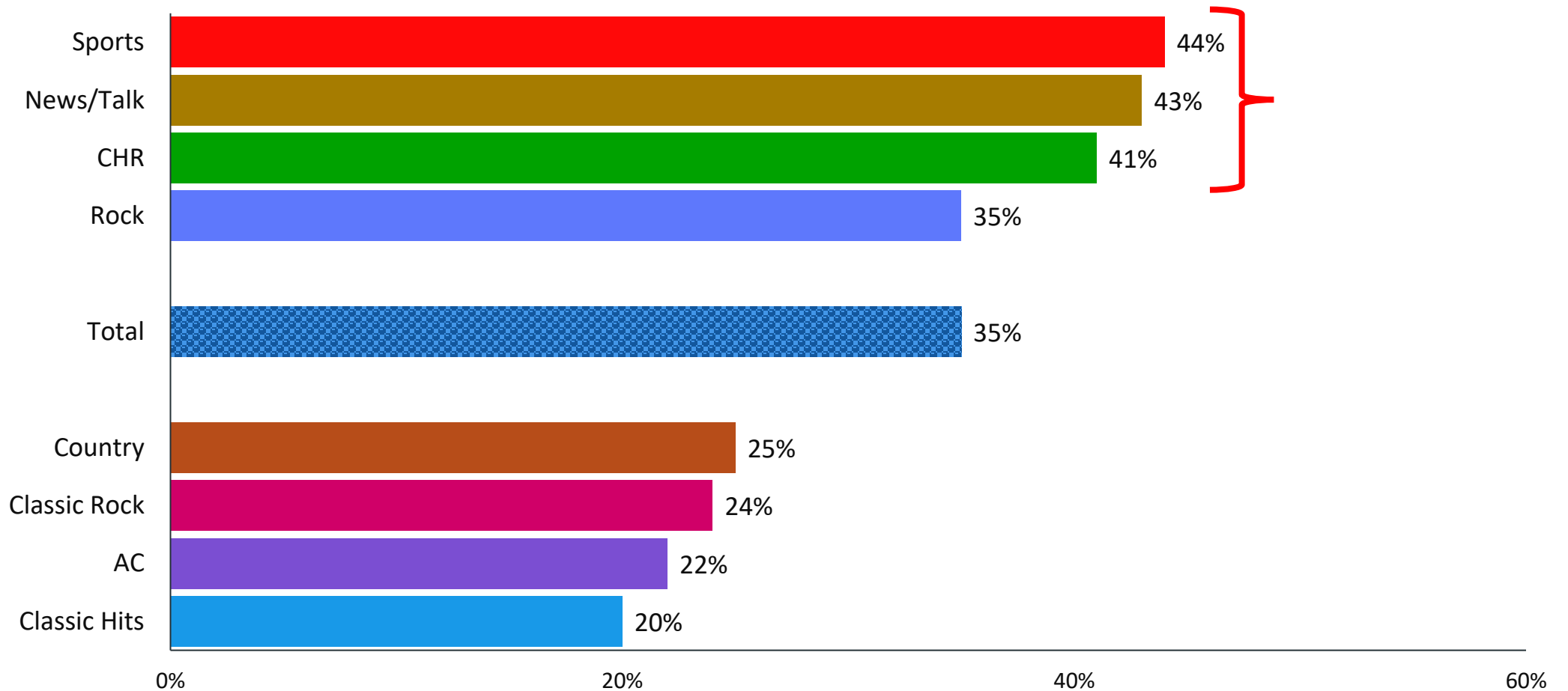
Weekly Podcast Listening Again Shows Growth at Now More Than One in Three, With Nearly Half of Gen Z and Millennials Listening Weekly



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



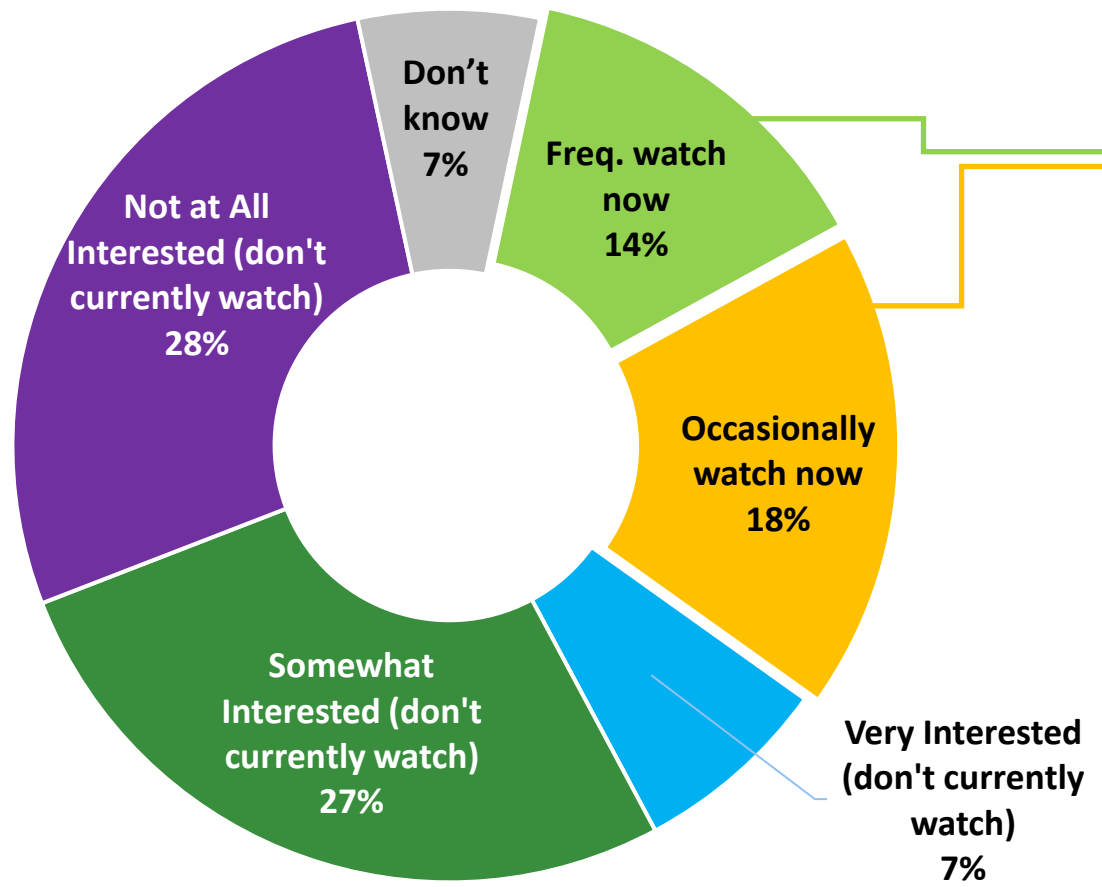
Sports Radio, News/Talk, and CHR Fans Are Most Apt to Be Weekly Podcast Listeners



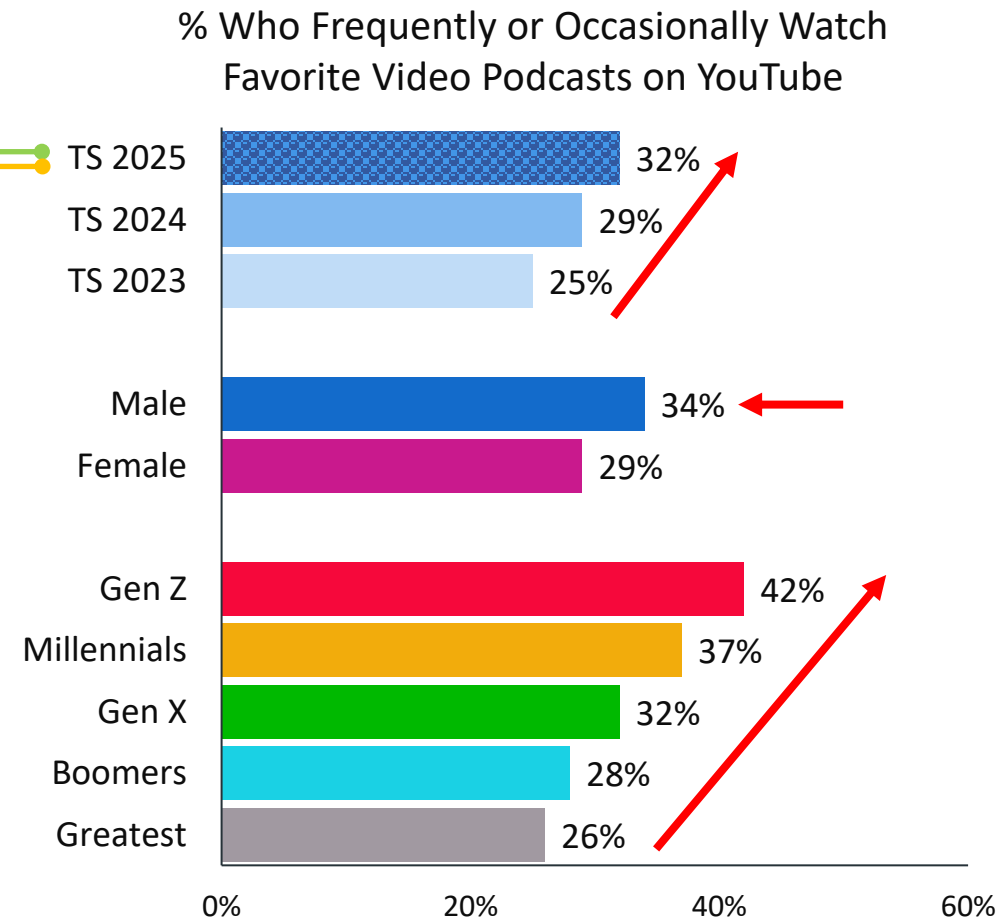
% by format, who listen to podcasts/on-demand audio weekly or more

NEW

Consumption of Video Versions of Favorite Podcasts Is On the Rise, Now About One in Three Weekly Podcast Users



“How interested are you in watching a video version on YouTube of your favorite podcasts you listen to now?”



Among weekly podcast listeners

Contact Us

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