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Techsurvey 2023 Shows Gap Between OTA And Streaming Listening Is Shrinking.

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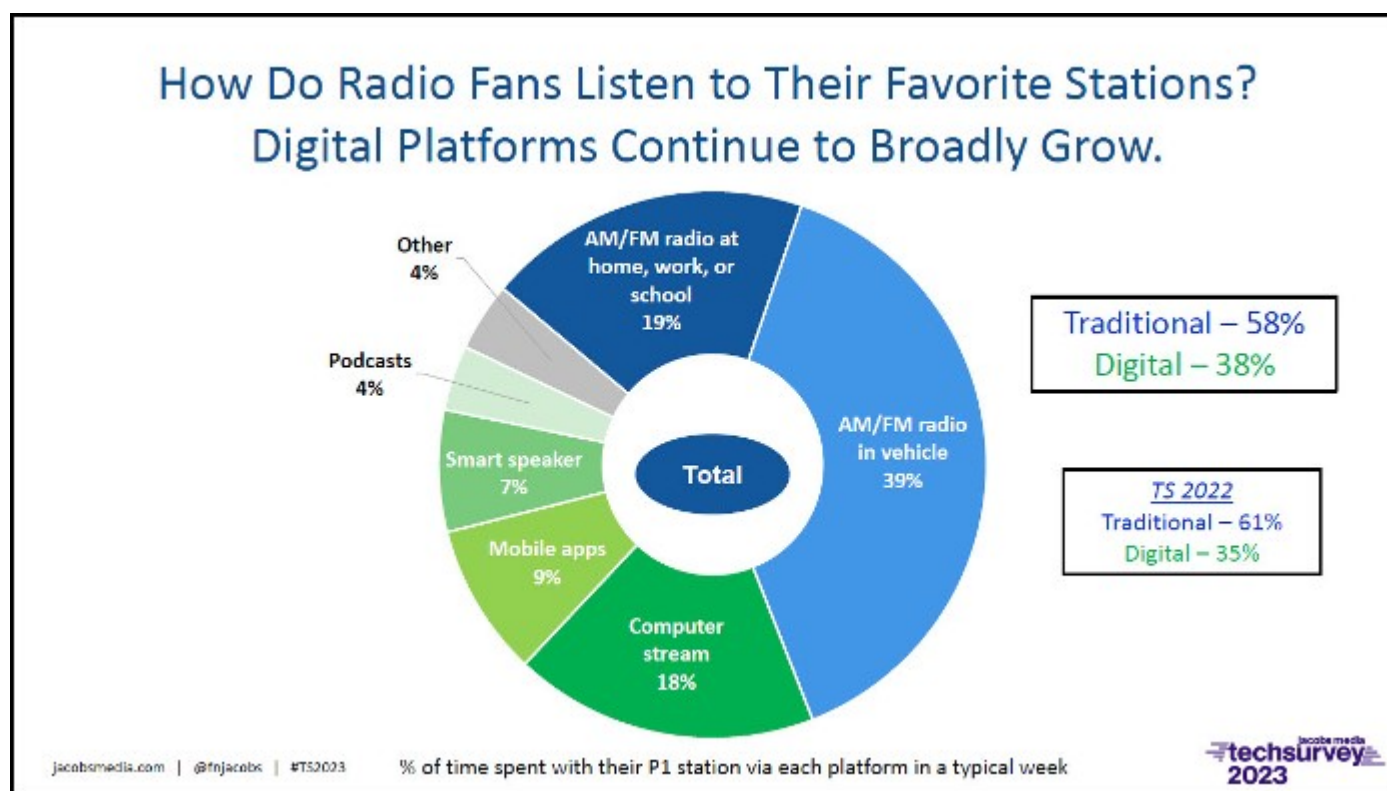


FABRICE COFFRINI

AM/FM radio dominates in-car listening and most broadcast radio consumption in any location occurs over the air. But as streaming audio grows, the gap between traditional and digital listening is narrowing. And with more connected cars hitting the road, radio faces an increasing number of competing audio options. Jacobs Media's Techsurvey 2023 puts new numbers against these trends from the vantage point of core radio listeners.

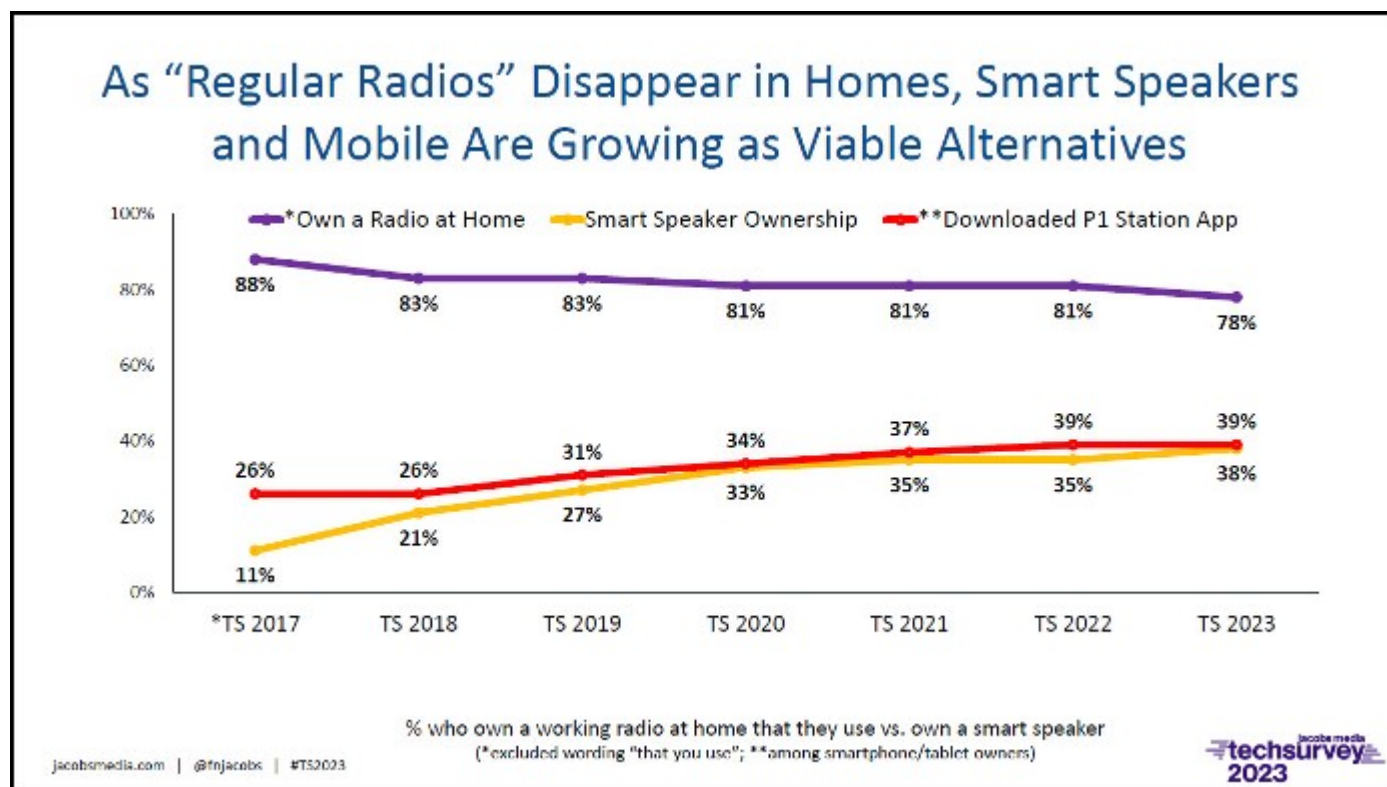
The 19th annual online survey includes responses from 30,000 radio users from the email databases and social media pages of more than 430 participating stations, who took part in Jacobs' online survey. Although not nationally representative – the sample skews older like the radio audience it reflects – the survey provides important directional trendlines on audio consumption and technology adoption.

Fielded during January and February of this year, it shows 58% of AM/FM radio listening among station P1's occurs over the air and 38% via streaming. About twice as much OTA listening takes place in a vehicle as does at home, work or school. The trendline shows the traditional-digital split is shrinking. In TS 2013, it was 85% traditional, 13% digital. "The digital line well more than doubled from 13% to 38%. You can definitely see two very different trajectories here," Jacobs Media President Fred Jacobs said during a webinar last week. Respondents who work entirely from home are more likely to listen to their favorite station on digital platforms.



Helping fuel this trend is the slow but steady disappearance of traditional radio receivers from American homes, especially in younger households. According to TS2023, 78% of core radio listeners have a regular radio, down from 81% last year and 83% in 2019. "In just the past six years, we have lost more ground," said Jacobs. "It started at 83%. It's now at its low point, only 78% of these core radio listeners have a working radio at home that they use."

As traditional receivers become less prevalent in homes, smart speakers and mobile apps are growing as viable alternatives. TS 2023 shows 39% of core radio listeners have downloaded their favorite station's app and 38% own a smart speaker. Says Jacobs, "This idea that you hear people talk about a lot, that smart speakers are like new radios at home, there's a lot to be said for that. And people who have downloaded their favorite radio station's app, has also been curving upwards."



Meanwhile, in the car, where most radio listening takes place, the ability to access other audio options is becoming easier for a growing number of Americans. Nearly three in ten Techsurvey participants now own an in-car internet-connected media system. Sports radio fans are the most likely to own a connected vehicle, followed by alternative rock, news/talk and country.

And as technologies like DTS AutoStage and Quu give radio stations new options for displaying visuals on dashboard screens, more than three in four survey respondents say they own vehicles that display artist and title information.

As for what core radio listeners want stations to show on car dashboard displays, current song/artist is far and away the top choice, followed by emergency weather info.

Among those planning on buying/leasing a new vehicle in 2023, or those who already bought one, Bluetooth and FM radio are the most important features desired. A smartphone AUX connector and in-dash navigation are features deemed very important by half the sample while AM radio (32%), Apple CarPlay (30%), SiriusXM (24%) and HD Radio (24%) are further down the list.

Although in-car radio listening competes with more media options, AM/FM radio makes up most of in-car audio usage (54%). Sirius/XM is a distant second, followed by "your music" (9%) and streaming audio (7%). The survey results document a slow but steady erosion of AM/FM's in-car audio lead over

the past five years from 62% in TS 2018 to 54% in 2023. AM/FM has a narrower lead (41%) among Millennials and drivers with a connected system (46%).

Podcasting's reach is expanding among core radio listeners with 42% now listening monthly or more often, per the survey. That includes 15% who listen weekly and 18% who listen daily. Moreover, weekly podcast listening hit a new high in 2023, especially among younger generations with more than half (53%) of Millennials listening to podcasts/on-demand audio weekly or more. But podcast momentum has slipped post-pandemic with three in ten weekly podcast listeners overall consuming more podcasts in the past year compared to a peak of 41% in 2020.

