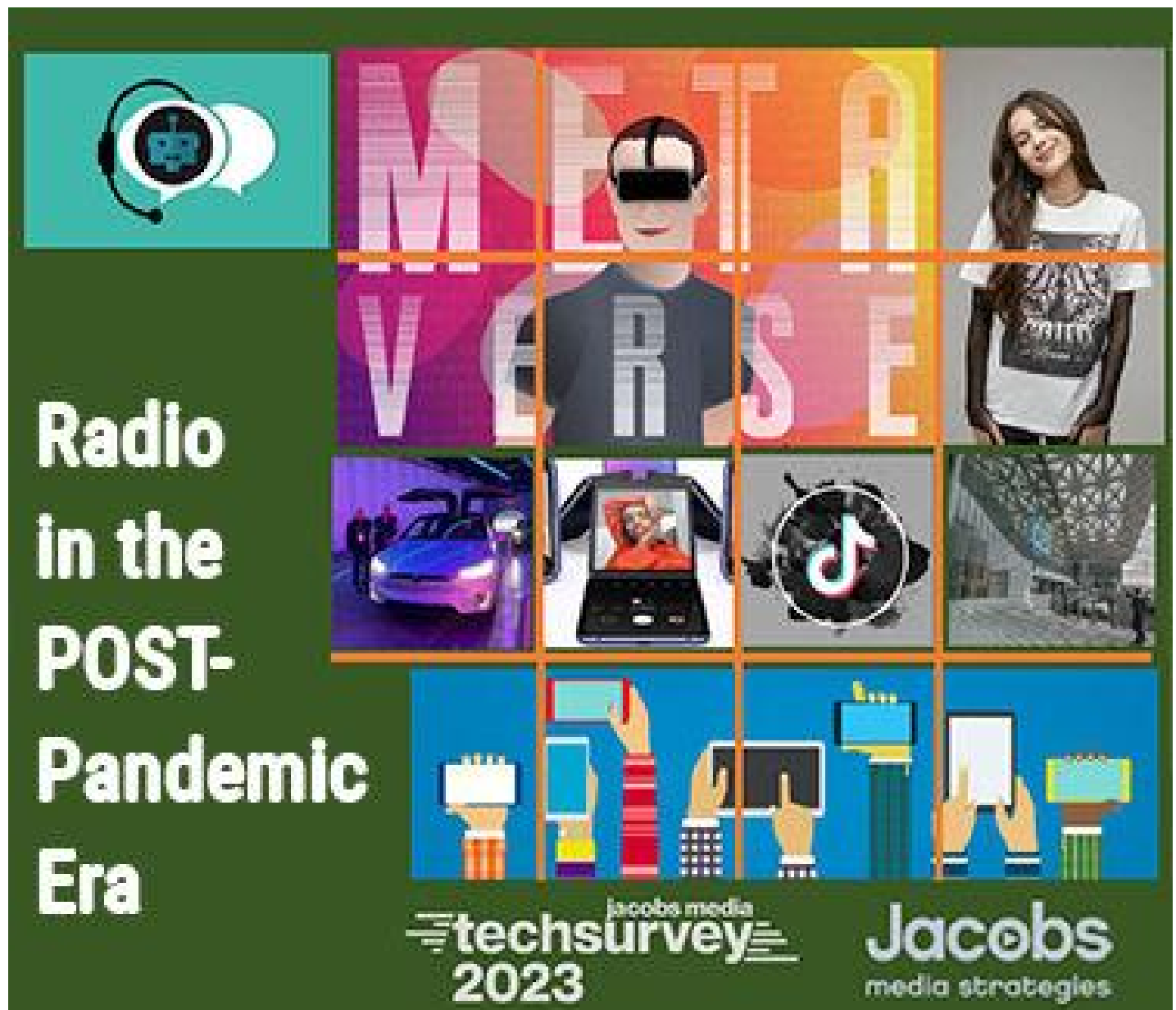


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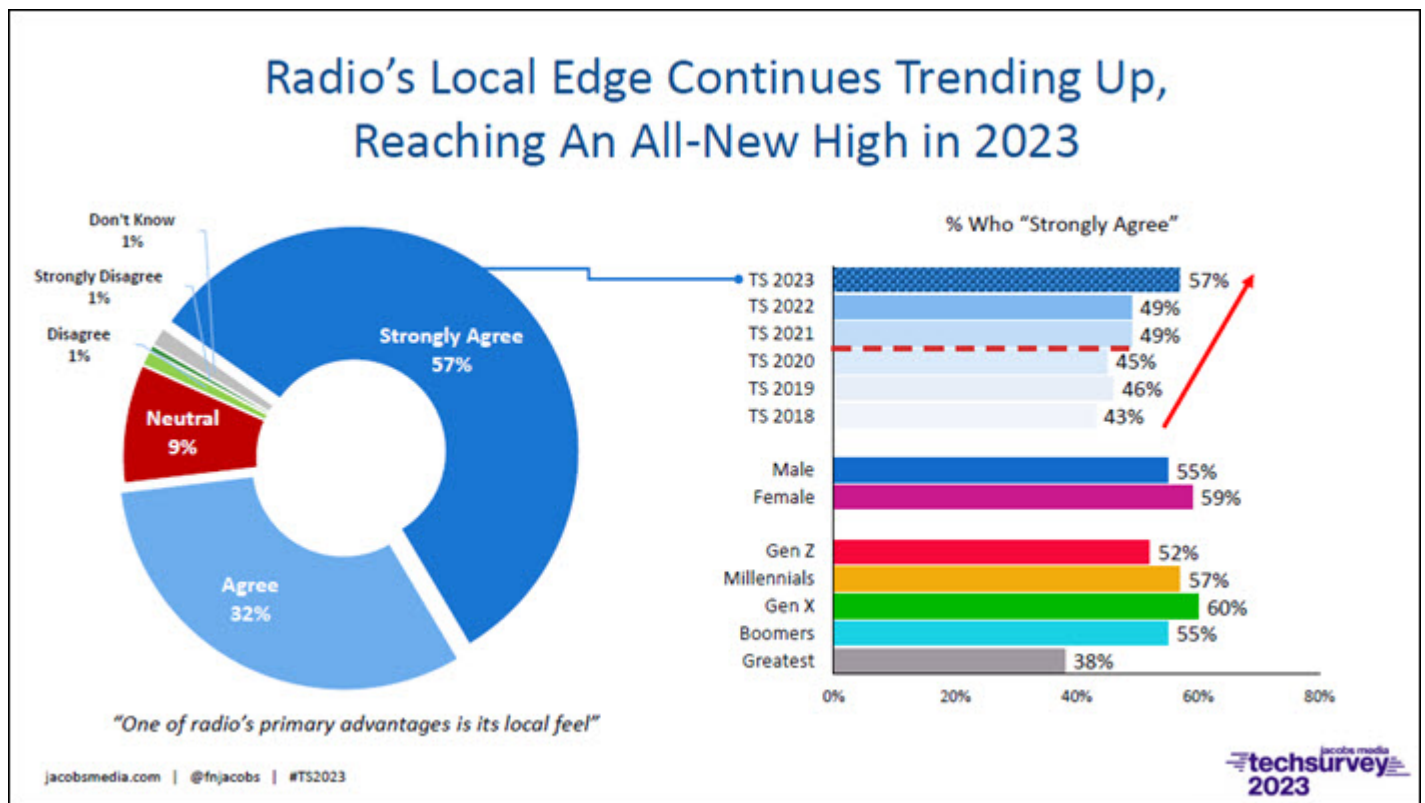
Techsurvey: Localness, Personality Still Drive AM/FM Listening, But There Are Red Flags.

May 11, 2023



The findings from Jacobs Media's 19th annual Techsurvey shine a light on radio's current strengths and weaknesses, showing an increasing importance of the medium's local edge, while noting downtrends in listening patterns, especially among younger respondents.

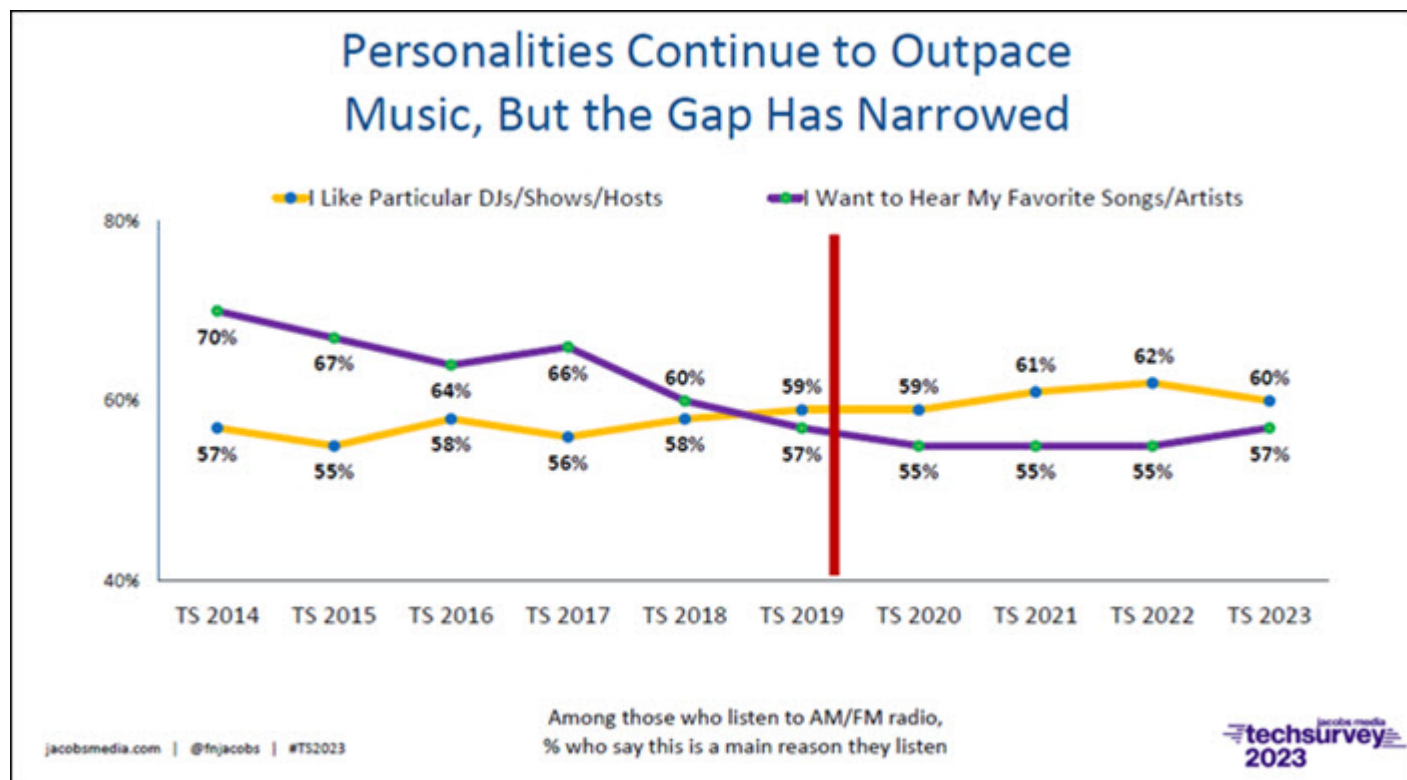
Based on 30,000 core radio users from the email databases and social media pages of more than 430 participating stations, who took part in Jacobs' online survey during January and February of this year, radio's local nature has become more of a key advantage. While four in ten participants (37%) say hearing about "what's going on locally" is a main reason for listening, nearly six in ten (57%) strongly agree that "one of radio's primary advantages is its local feel," up significantly from 49% a year ago and 43% in 2018. That growth is driven by Gen X and Millennials, where 60% and 57% strongly agree, respectively.



The top two reasons given for listening to AM/FM radio continue to be that it's "easiest to listen to in [the] car" and "it's free." More than half (52%) say they "feel a connection with radio," which is another up trending driver, as 42% of respondents agree that they feel a sense of connection to the station that sent them the survey, up from 37% in 2022.

"We continue to see signs that connectivity and local are really big differentiators for broadcast radio," Jacobs Media President and founder Fred Jacobs said Wednesday during the company's Techsurvey 2023 webinar. "All of those measures continue to trend up, really since COVID struck."

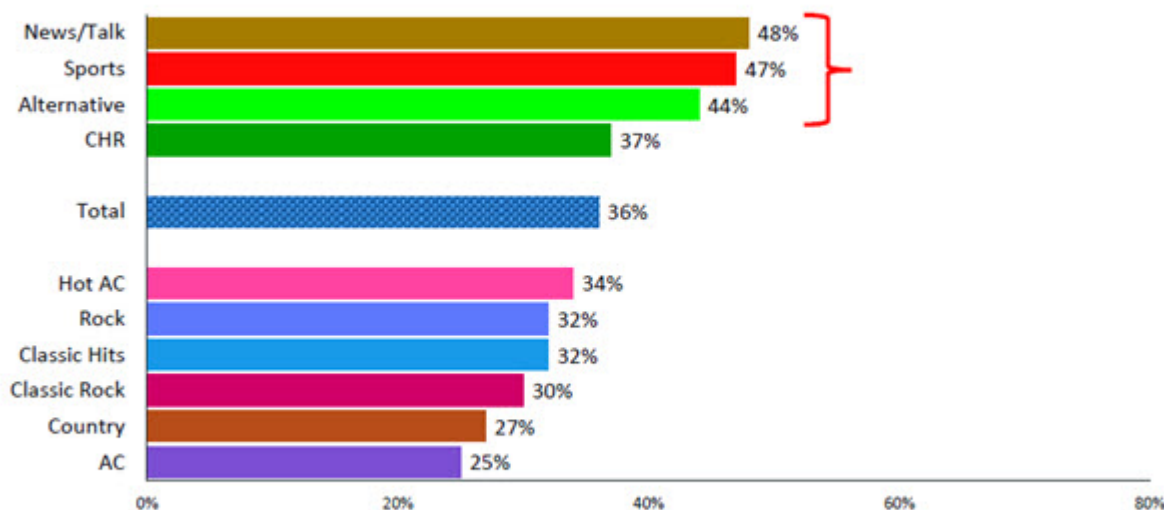
In 2019, broadcast radio personalities pushed ahead of music as a main listening reason, with the gap between the two widening to seven percentage points in 2022. This year, however, the two are closer than they've been since before COVID, with 60% citing DJs/shows/hosts vs. 57% mentioning wanting to hear favorite songs/artists.



Jacobs' report points to two reasons survey participants give for listening to AM/FM less in the past year, that may have led to less of an edge for personalities: 27% say 'the station I liked changed formats [or] fired [a] personality.' "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," the report says.

Even with the pandemic over, the number of participants working at home continues to impact listening habits. More than one in three (36%) are still working full- or part-time from home, with both Gen X (48%) and Millennials (18%) indexing higher than the total sample. Programmers of news/talk, sports, alternative and CHR stations should take note that listeners to these formats are most likely to be working from home.

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



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

techsurvey
2023

Amid the mostly-strong showing for radio in Jacobs' Techsurvey 2023, there are also warning signs. While overall audio consumption is up, driven by streaming audio and podcasts, AM/FM radio listening on any device for one hour or more each weekday is flat from last year at 86%, last at 90% or above prior to COVID. Those numbers are lower for Gen Z (79%) and Millennials (81%). While the percent saying they are listening to AM/FM less is unchanged from 2022 (12%), the top reasons for this include spending less time in the car, lifestyle changes, and more audio options in the car, that latter choice up from 33% to 38%.

"New media choices – digital audio, podcast, satellite radio – continue to be a threat to broadcast radio listening," Jacobs said during the Techsurvey webinar. "There's more driving going on out there, [which] means people are going out and buying new cars –and when they do, they are buying connected cars, because that's pretty much all the automakers are making at this point. And when you have a connected car, you have many more options. So that's an issue for radio as well."