اباباً RADIO: LIVE ON AIR AND EVERYWHERE







Key findings

- There are six kinds of radio listeners across a spectrum of engagement
- The more engaged group is more open to advertising
- Most people believe ads are a fair trade for their listening time
- NPR listeners are very open to its sponsorship messages







630/0 of Americans listen to AM/FM radio each day 800/0
of Americans listen to AM/FM radio each week

Source: Edison Research, Share of Ear® Q4 2020; U.S. Adults 18+

Source: Nielsen, Q2 2020

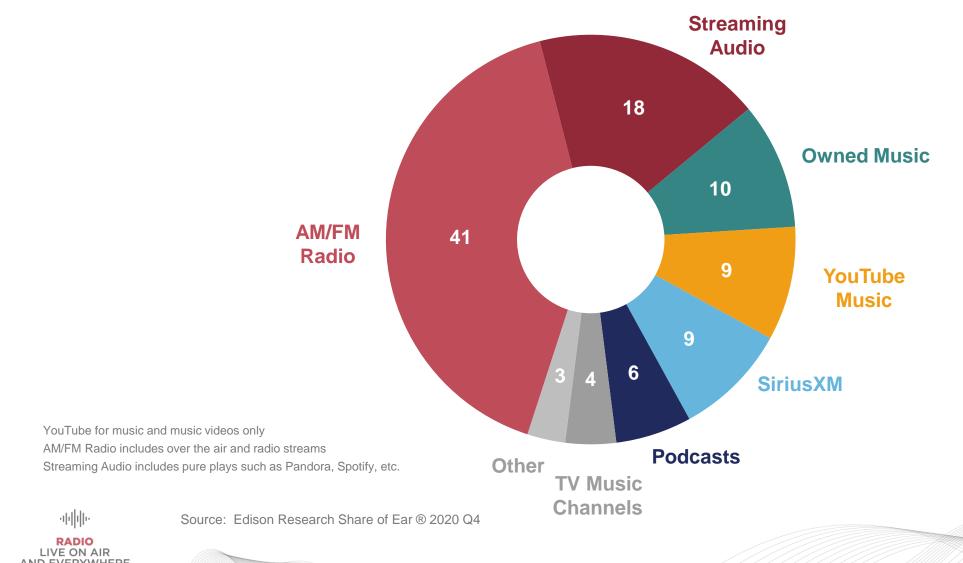






Radio has the biggest share of listening time

Commanding 41% of audio listening of U.S. adults age 18+







Survey Methodology

- 1,500 online interviews
- Adults ages 18+
- Interviews conducted 1/13 1/21, 2021
- All respondents reported listening to AM/FM radio (traditional or streamed) in the last week
- Data weighted to match the sex, age, and ethnicity of AM/FM radio weekly listeners from the Edison Research and Triton Digital Infinite Dial 2020 report







Index

(Weekly time spent listening vs average)

9% of radio listeners

Radio Heads: Use radio for everything

16% radio listeners

112 Connection Seekers: Use radio for connection

18% radio listeners

108 Infomaniacs: Radio listening is driven by news

27% of radio listeners

100 Rhythm Rockers: Radio listening is driven by music

17% of radio listeners

Laid-back Listeners: Listen to radio in the background

13% radio listeners

Habitualists: Listen to radio when it's the only option available



65

How to read: In this index, the average time spent listening among all weekly radio listeners is represented as 100. An index number of 102 means a 2% more time listening than the average of all listeners and an index number of 98 means a 2% less time listening







Listener Segments



Radio Heads

Use AM/FM radio for everything – music, news, personalities/talk, and sports

Demographics

More likely to be female and under age 54; over-index in listeners who are Black or African American

All-Around Audiophiles

Radio Heads report higher than average listening to online audio, music videos on YouTube, and streamed AM/FM

Beyond the AM/FM Dial

In the last week, 43% listened to radio on their smartphone, 30% on a smart speaker, and 29% on a computer



Most Time with Audio

This group clocks in more time with AM/FM than any other group. They also report more time with all forms of audio

Advertiser-Friendly

72% of Radio Head typically listen to advertisements on AM/FM radio

Employment

More likely to be employed, have higher than average income, and have attained a higher education than the average AM/FM listener



Source: Radio: Live On Air and Everywhere from NPR and Edison Research





Connection Seekers

Listen to the radio for companionship

Demographics

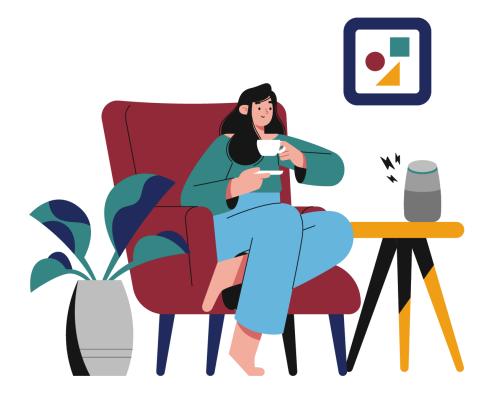
Connection seekers are more likely to be female and over-index in listeners who are age 55+ and in listeners who are White

Heavy Listeners

Connection Seekers listen heavily to AM/FM radio, second only to Radio Heads

Prefer Spoken Word

Connection Seekers over-index in listening to spoken word audio



At-home Listeners

64% listened at home in the last week – more at-home listening than all other groups except Radio Heads

Hug the Average

Radio listening habits are similar to the average listener in the audio platforms they use, the devices they use to listen to radio, and the time of day they listen

Advertiser-Friendly

70% of Connection Seekers typically listen to advertisements on AM/FM radio







Infomaniacs

Radio listening is driven by news

Demographics

This group is the only one of the six where men are a higher percentage than women

Open to Advertisements

65% of Infomaniacs typically listen to ads on AM/FM radio; only 35% say they frequently avoid ads

Morning Listeners

69% of Infomaniacs listen between 6am-10am, the highest listening in that daypart of all the segments



Prefer Spoken Word

Infomaniacs over-index in spoken word listening: 96% listened to AM/FM radio for news, 78% for music, 43% for personalities/talk, and 27% for sports in the last week

NPR listeners?

Infomaniacs are not exclusively NPR listeners, but they index extremely high – 37% of this group has listened to NPR in the past week and 46% listened in the last month

Education & Income

64% of Infomanics have a college degree or higher; tied for the most highly educated group. Infomaniacs also over-index in the high income categories







Rhythm Rockers

Radio listening is driven primarily by music

Music-first

Music is a big driver of audio consumption, and nearly all AM/FM listeners listened to music in the last week, so it is not a surprise that the largest segment is music-focused

Heavily Female

While most segments skew female, the Rhythm Rockers group is the most heavily female, 61% to 39% male

Demographics

The youngest segment: three-quarters of this group is age 18-54; over-index in listeners who are Latinx, under-index in listeners who are White; over-index in the low income categories



Streamers

More likely than the average listener to use online audio services like Pandora, Spotify, and YouTube

Radio-driven

AM/FM listening is king in the car – and this group in particular says that radio keeps them company in the car

Songs before Speech

Less likely to listen to spoken-word audio than the average radio listener







Laid-back Listeners

Listen to radio when they want something in the background

Demographics

This group skews older -76% are age 35+; over-index in listeners who are White

Radio-centric

Less likely than the average AM/FM listener to use other audio platforms like listen to music on YouTube, online audio platforms, or podcasts

More than half listen to ads

More apt to try to avoid advertisements on AM/FM radio than other groups. Even still, less than half say they frequently try to avoid advertisements on the medium



Over-the-air

Prefer listening via a traditional AM/FM radio, with 95% choosing to listen via receiver and less than 15% listening via a smartphone, computer, or voice-enabled speaker

Songs before Speech

Prefer music, under-indexing on listening to spoken word audio

Prefer Music

89% listened to music in the last week – the same music listening as the average AM/FM radio listener







Habitualists

Listen to radio when it's the only option available

Demographics

This group skews older, with 78% age 35+

Audio Ambivalent

This group is not that interested in audio in general – they report far less than average use of online audio services, YouTube listening, and even their own music collection

More than Half Listen to Ads

This group is the most apt to avoid advertisements on AM/FM radio compared with other groups. Even still, less than half say they frequently try to avoid advertisements on the medium



Songs before Speech

Habitualists prefer music. They underindex listening to spoken word audio

Value Radio

While they are less engaged with radio, Habitualists still spent 3 hours listening in the past week, and 60% said they would miss radio if it were no longer available

Over-the-air

Habitualists prefer to listen via a traditional AM/FM radio, with 93% choosing to listen via receiver and below average listening via smartphone, computer, or voice-enabled speaker

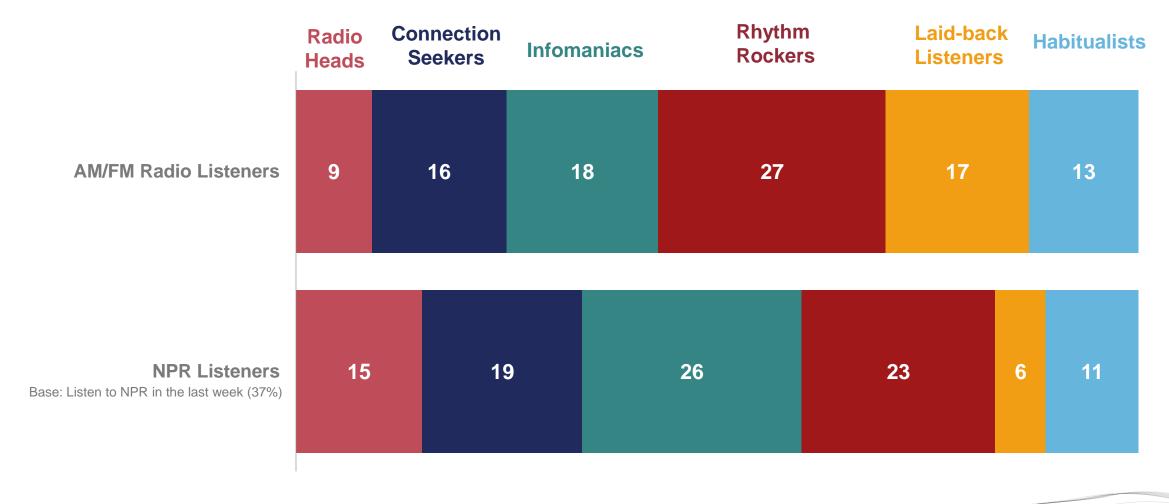








Weekly AM/FM radio listeners vs. NPR listeners









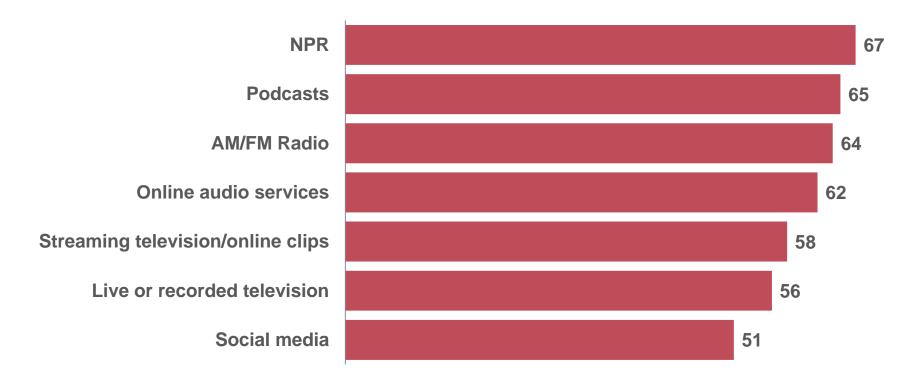


Radio Advertising



AM/FM radio listeners are more engaged with ads on radio than ads on TV or social media

% who typically listen to or watch sponsorships or advertisements while engaging with each platform:



^{*&}quot;Typically listen or watch" = answered "sometimes", "hardly ever", or never" to "How frequently do you try to avoid sponsorships or advertisements while watching or listening to... [each medium]?"







The heaviest users of radio are also the most open to its advertising messages

% who typically listen to sponsorships or advertisements while listening to AM/FM radio:



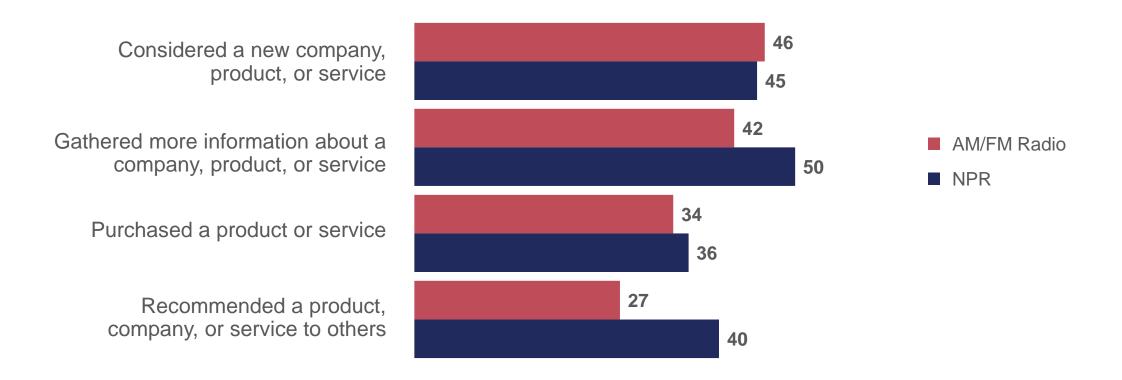
^{*&}quot;Typically listen" = answered "sometimes", "hardly ever", or never" to "How frequently do you try to avoid sponsorships or advertisements while watching or listening to radio?"







As a result of hearing an advertisement on [platform], have you ever....?









NPR Radio Sponsorship Impact

Percent lift for NPR radio listeners vs. non-listeners

+23%
Brand awareness

Reported website visits

+13%
Interest in learning more about sponsor brands





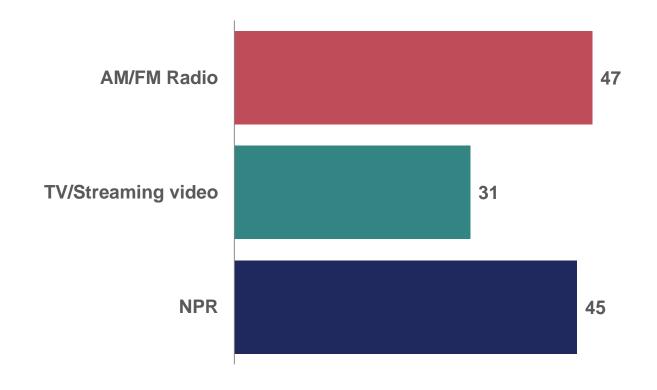




Radio vs. TV



Agree/Disagree: You learn about local businesses from advertising on [platform]

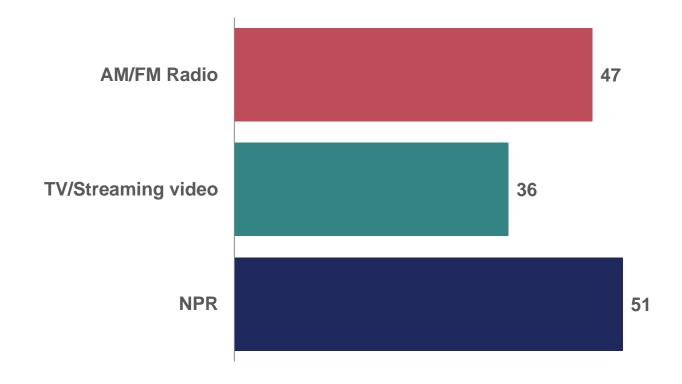








Agree/Disagree: Listening to/watching ads is a fair trade for the free content you get on [platform]

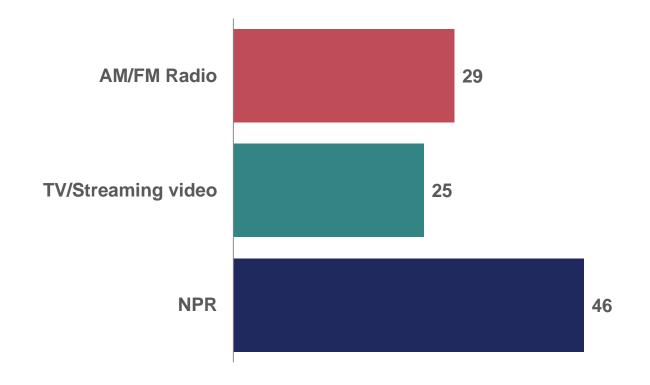








Agree/Disagree: Your opinion of a company is more positive when you hear it mentioned on [platform]

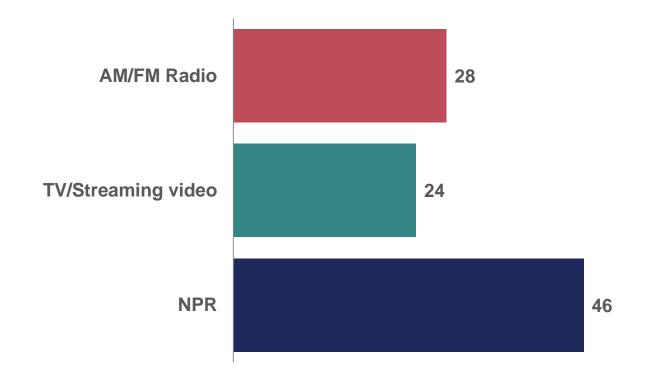








Agree/Disagree: You are more likely to trust a company that you hear advertised on [platform]

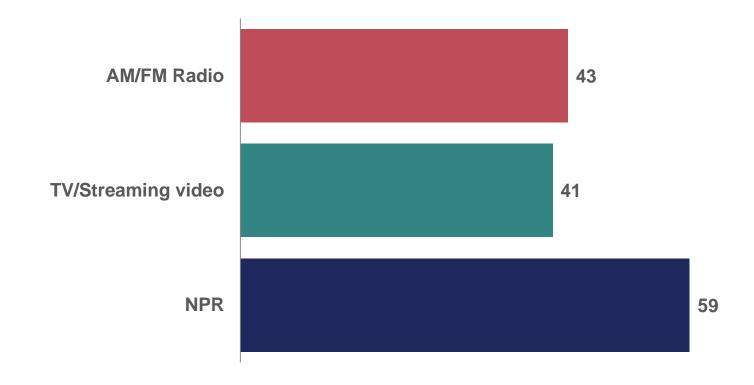








Agree/Disagree: [Platform] engages your mind in a more positive way than other media does

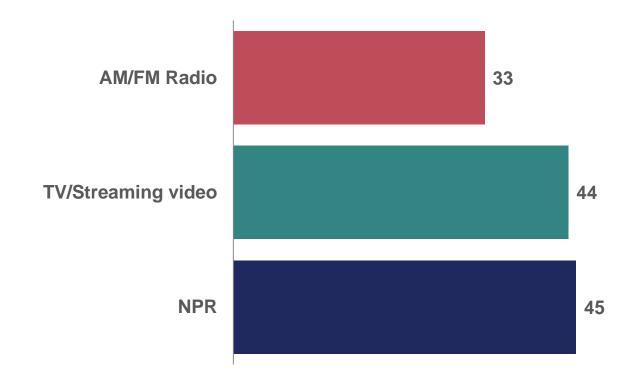








Agree/Disagree: [Platform] is becoming a more important part of your life











Key findings

- There are six kinds of radio listeners across a spectrum of engagement
- The more engaged group is more open to advertising
- Most people believe ads are a fair trade for their listening time
- NPR listeners are very open to its sponsorship messages







اباباً RADIO: LIVE ON AIR AND EVERYWHERE



