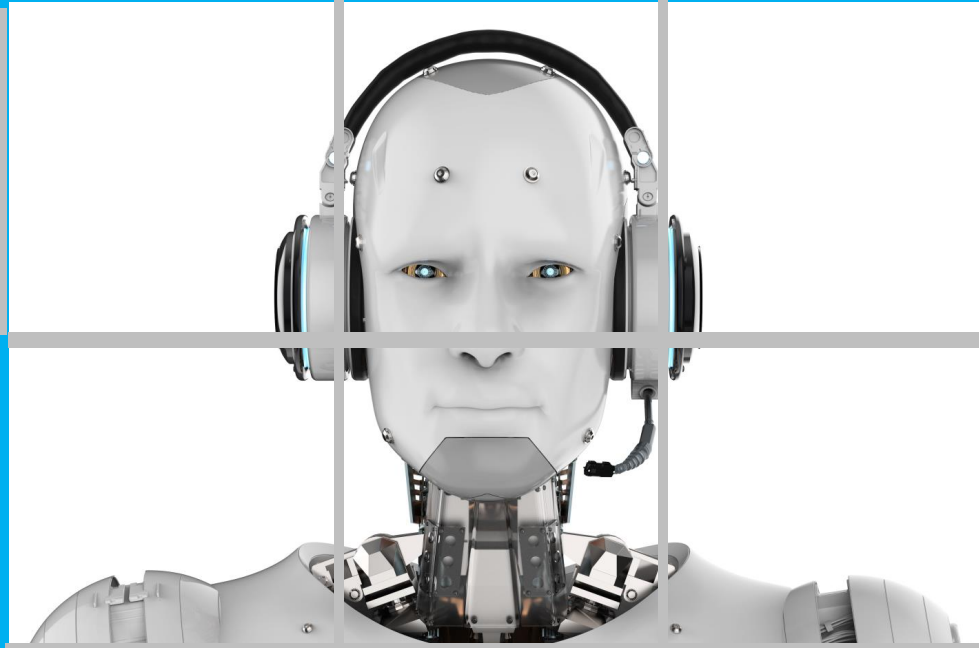
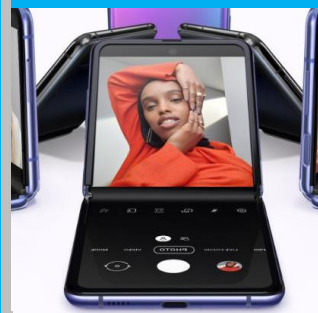


**INSIDE
RADIO**



Jacobs | **40**
media strategies

jacobs media
techsurvey
2024



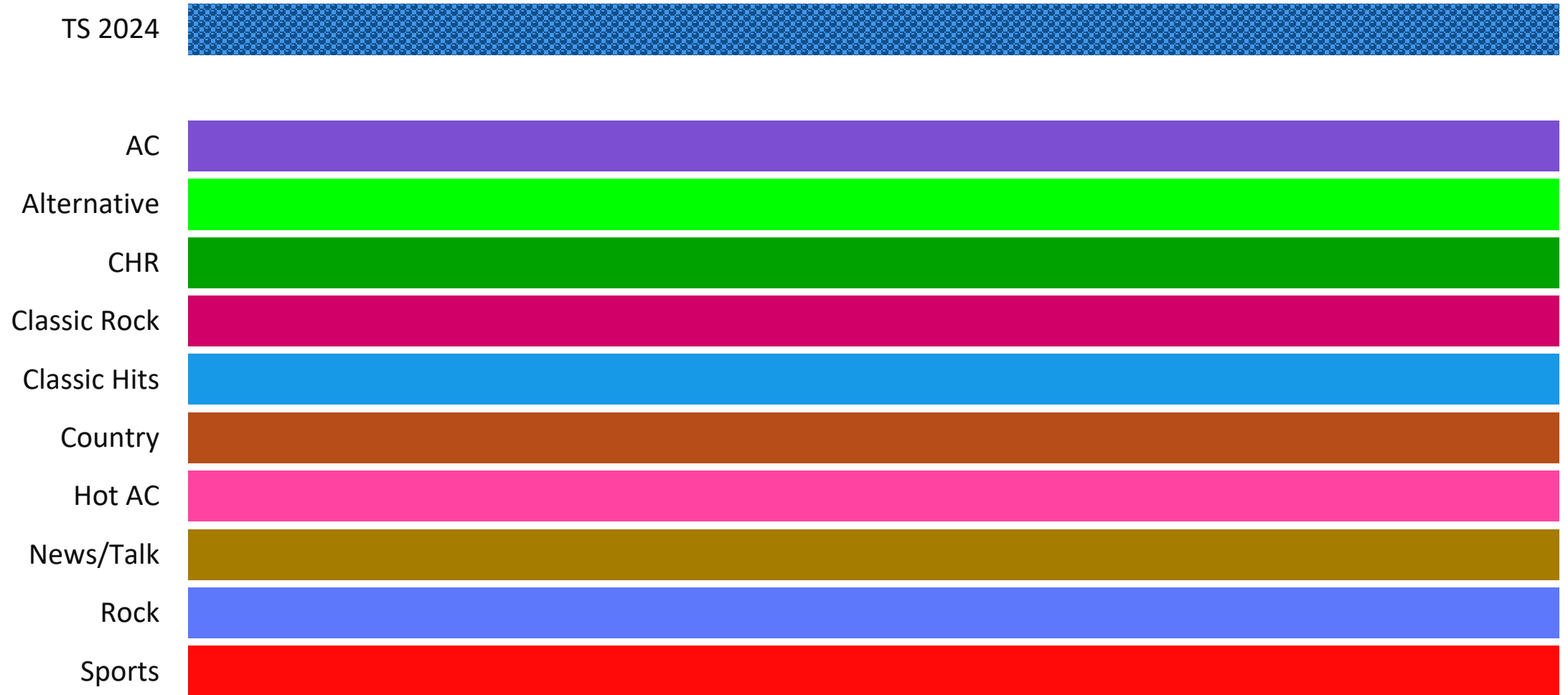
Radio in the AI Era



Methodology

- 500 commercial radio stations in the U.S. & Canada
- N = 31,413
- Interview dates: January 9 - February 11, 2024
- 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 2023 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

- Broadcast radio has its challenges – an aging audience, more choices (especially in the car), and too many workers not going into the office. Still, the medium is showing stability and resilience.
- Key reasons for radio listening erosion continue to be less time in cars & lifestyle changes, but other audio options remain as the primary obstacle.
- Broadcast radio’s “connectivity” and “local-ness” set it apart from podcasts, DSPs, and personal music collections. And both rise in importance again this year.
- For six years, personalities have continued to outrank music for station preference, and a new question series reveals a majority of fans desire a deeper connection with station hosts.
- Net Promoter recommendation scores slip again in 2024, but are still above the 20-year average.
- Even radio fans grossly underestimate the percentage of American that listen to AM/FM stations weekly.
- Similar to the results in Techsurveys for public and Christian music radio, core radio listeners are both highly skeptical *and* fearful of AI. They are especially against the idea of bots replacing human hosts.
- While digital listening to broadcast radio station is flatlining, it continues to be a significant way many listen.
- “Regular radios” continue to disappear in homes, but thankfully, P1 station mobile apps and smart speaker ownership are becoming more prominent.
- Most radio listening among Millennials and Gen Zs takes place in cars.

Key Findings

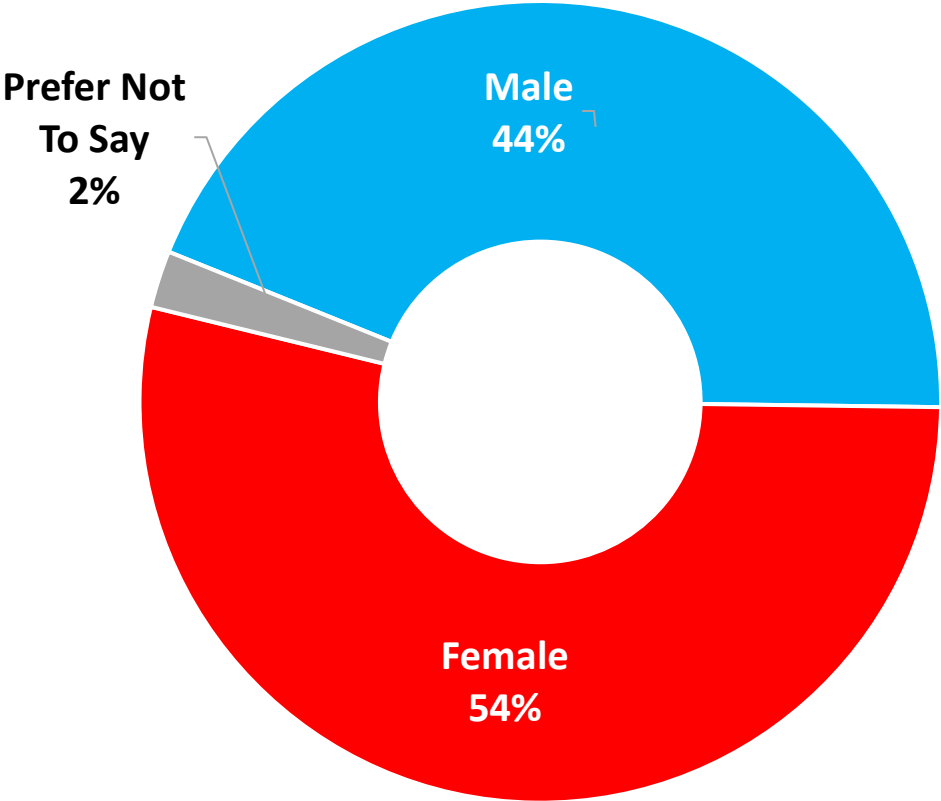
- Bluetooth remains the most desirable new car media feature, but both FM and AM have ticked upward in desirability.
- Radio mobile apps are becoming more ubiquitous and earn stellar ratings from those who use them.
- The social media hierarchy is mostly stable, but Twitter/X has incurred losses YoY.
- Subscription fee concerns continue to rise, but so does the appreciation that AM/FM radio is free.
- Concert attendance was robust last year, and consumers are spending money to travel to shows long distance and purchase artist merchandise.
- What insights will YOU see in this year's data?



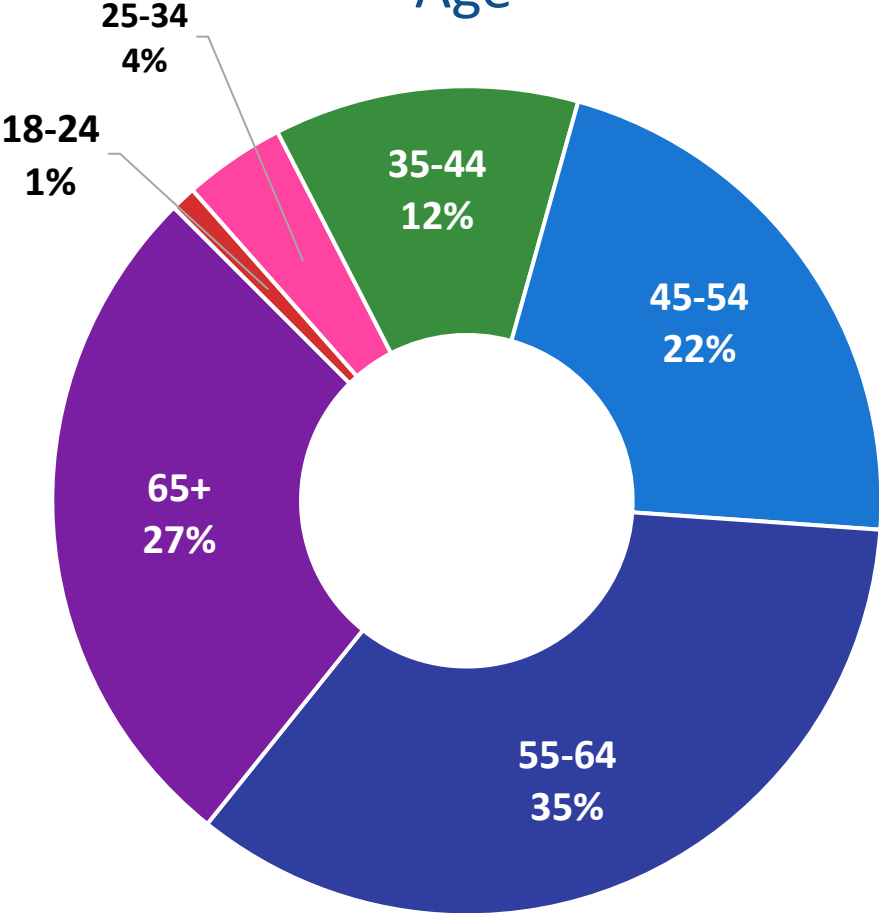
The Sample

Demographics

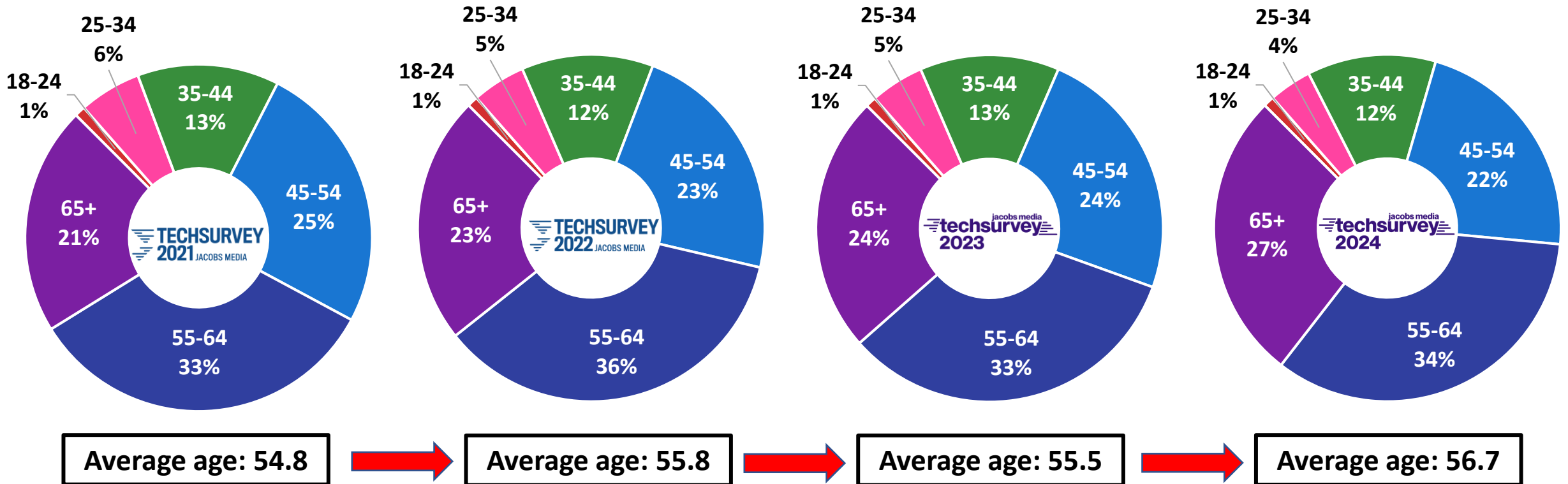
Gender



Age



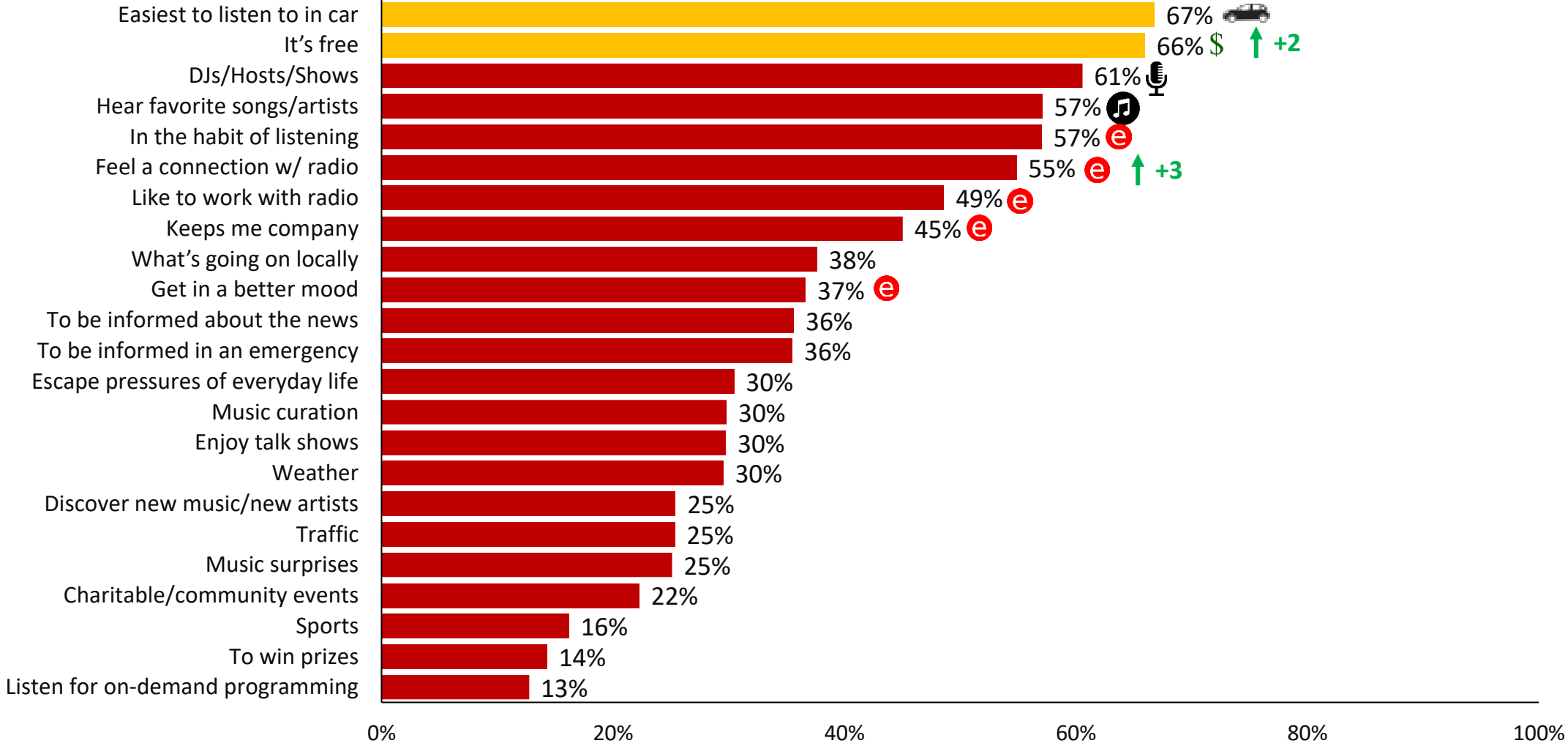
Like Radio, Techsurvey Is Aging, Now Well Outside of 25-54





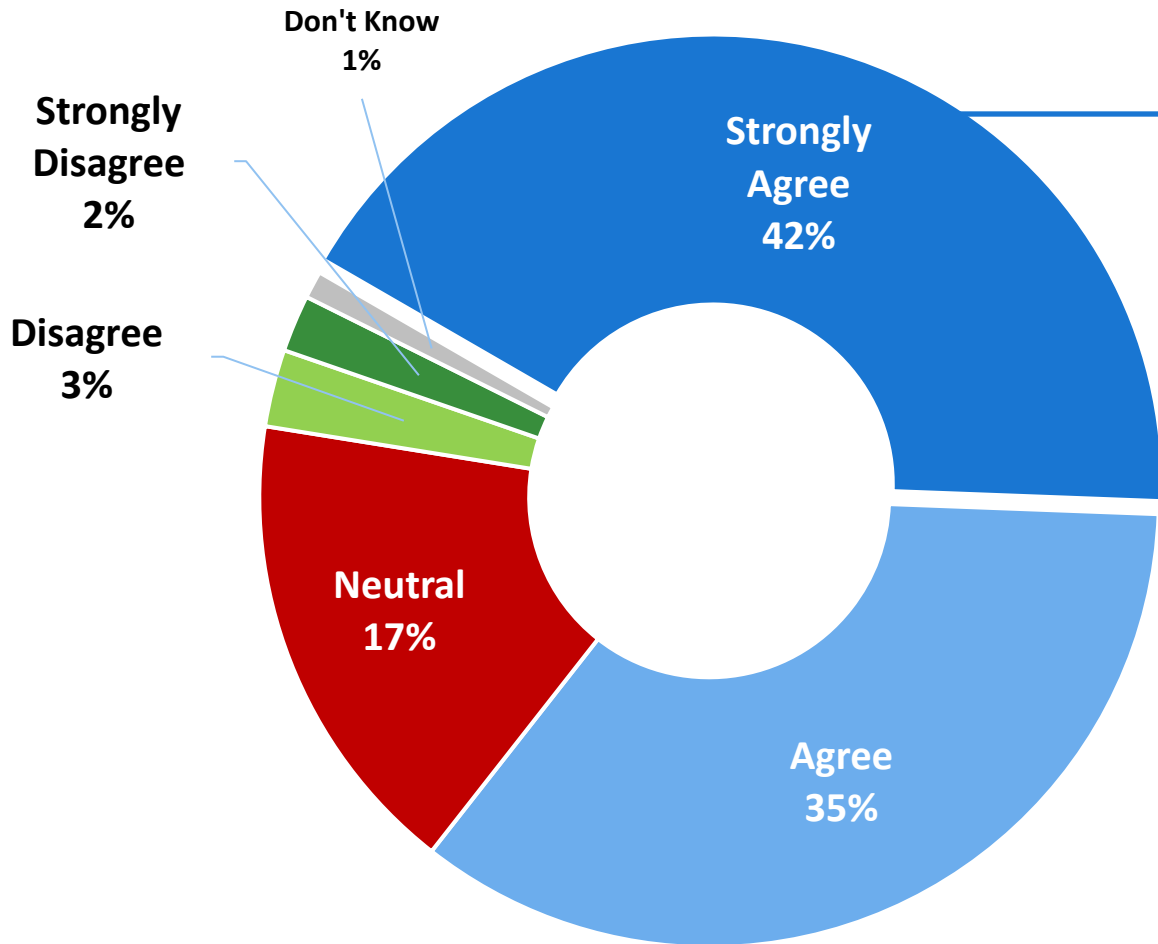
Radio is holding its own. Techsurvey 2024 shows both resilience and areas where broadcasters need to make improvement. The vital signs are hanging in.

Why AM/FM Radio? Two-Thirds Say It's Easiest To Listen To In the Car and It's FREE

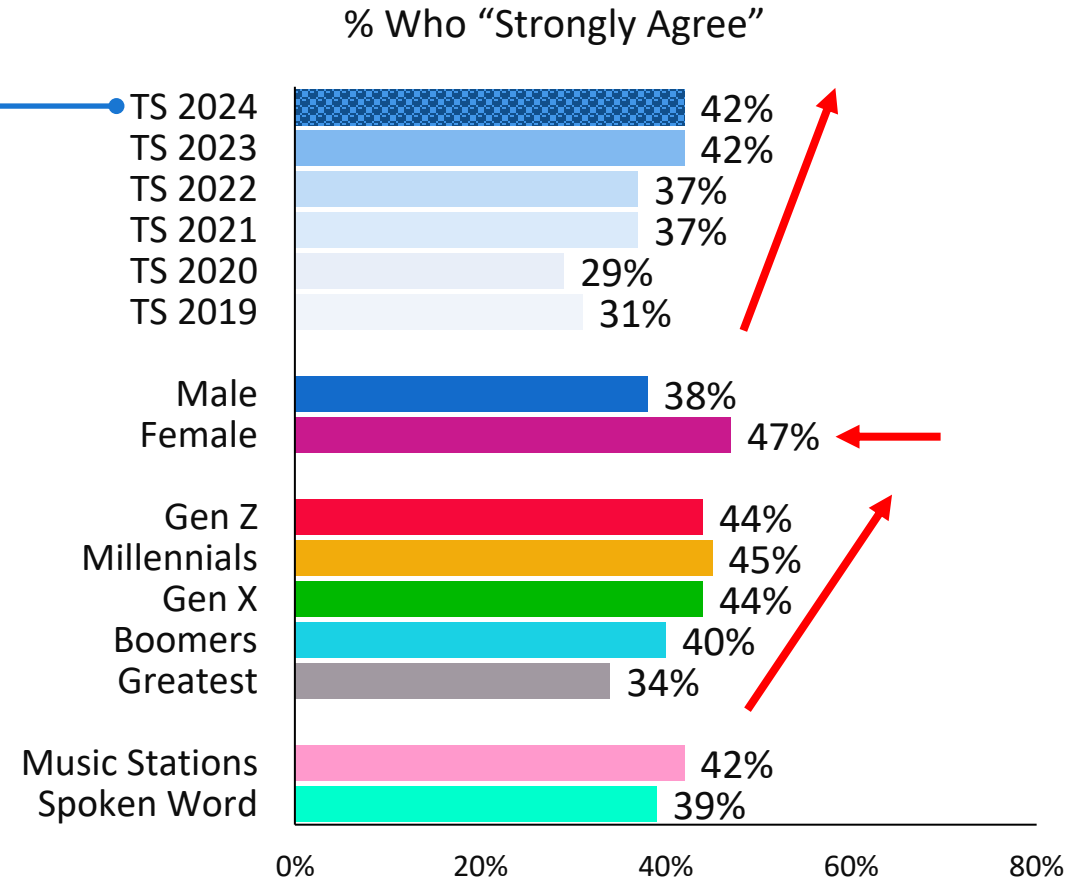


Among those who listen to AM/FM radio, % who say this is a main reason they listen

Radio Listeners Feel a Strong Sense of Connection to Their P1 Station, Especially Women and Younger Radio Fans



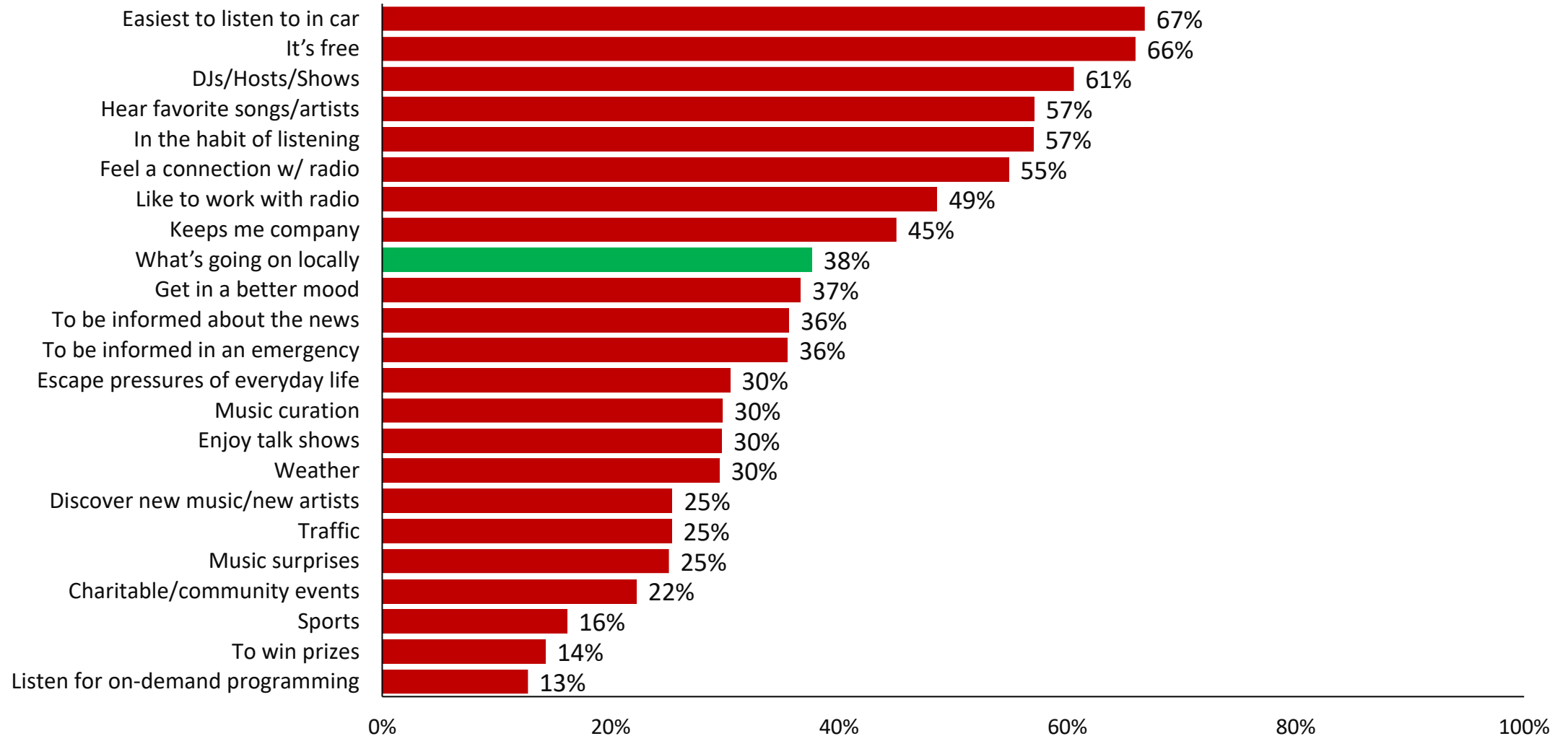
*"I really feel a sense of connection to
THE STATION THAT SENT ME THIS SURVEY"*





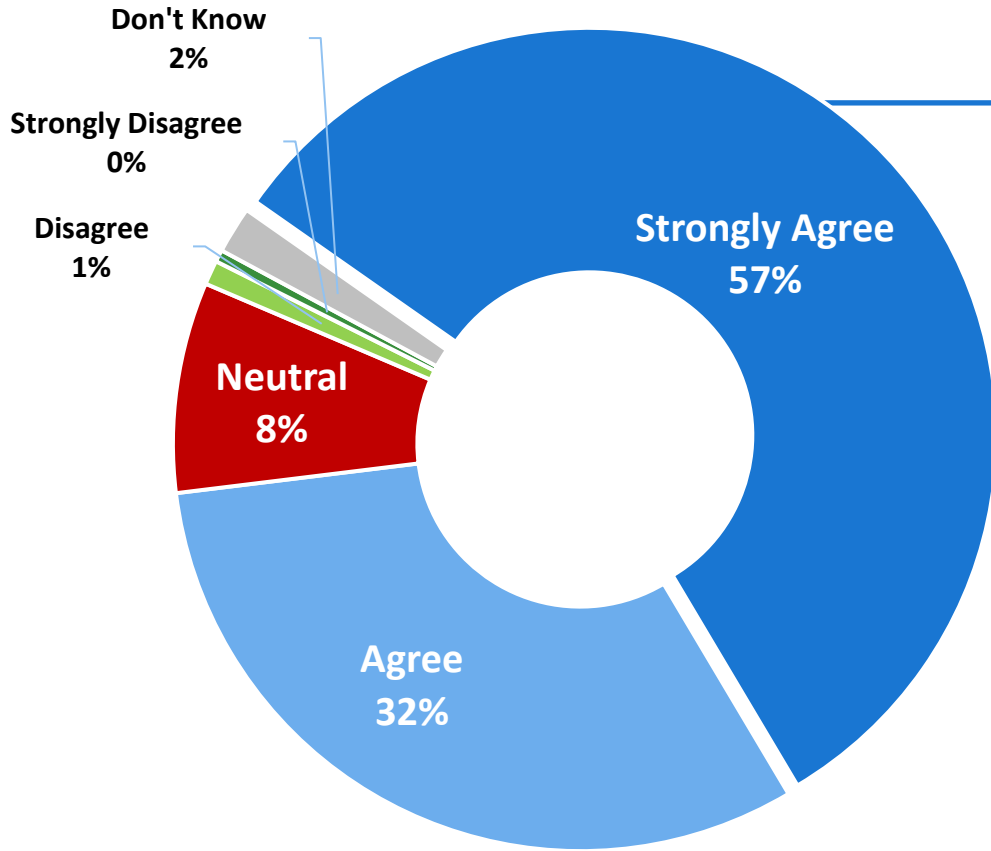
The changing role of “local” in broadcast radio

Why AM/FM Radio? Nearly Four in Ten Cite the Local Vibe



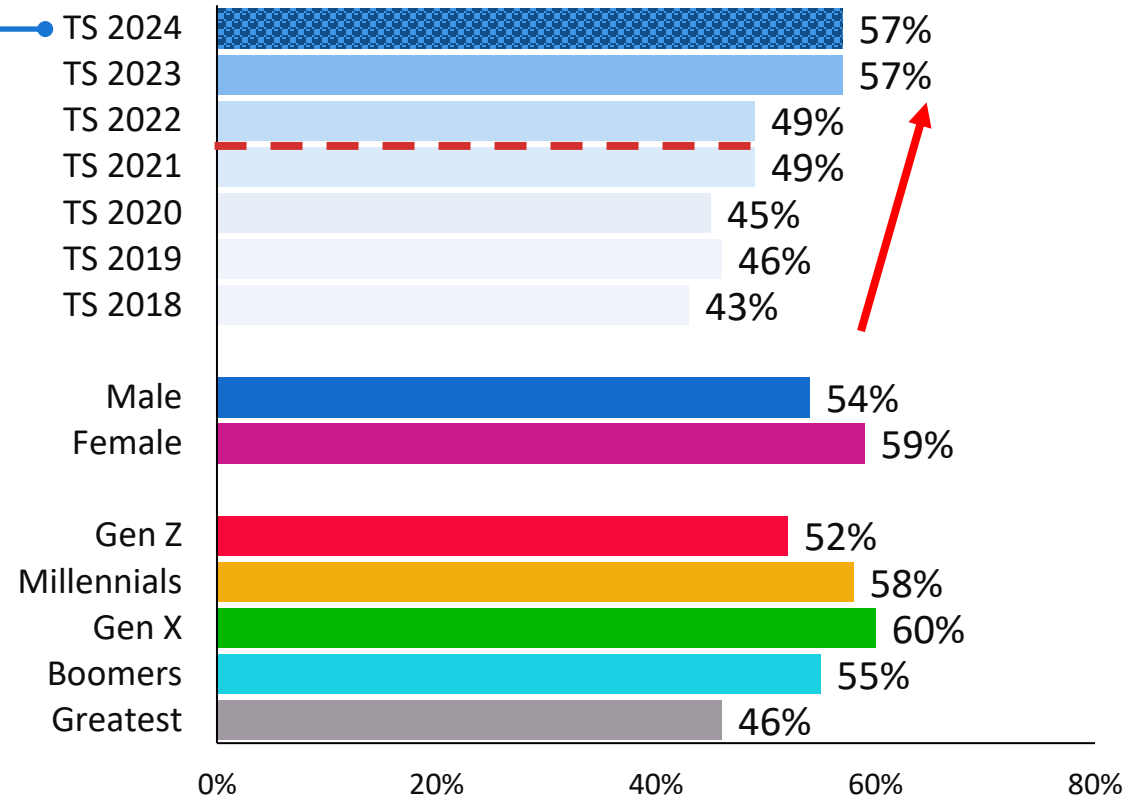
Among those who listen to AM/FM radio, % who say this is a main reason they listen

Radio's Local Edge Retains Its All-Time High



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

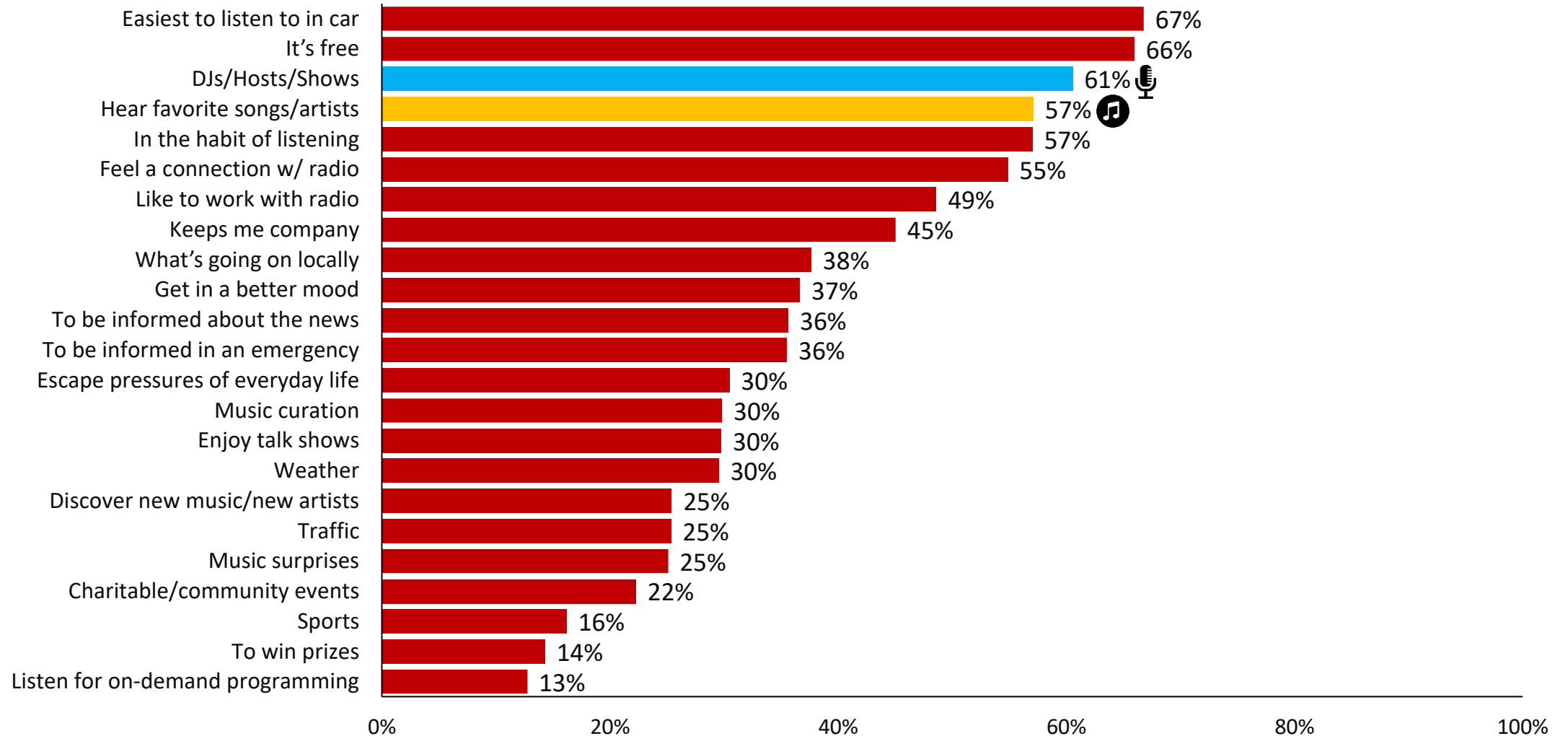
% Who "Strongly Agree"





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

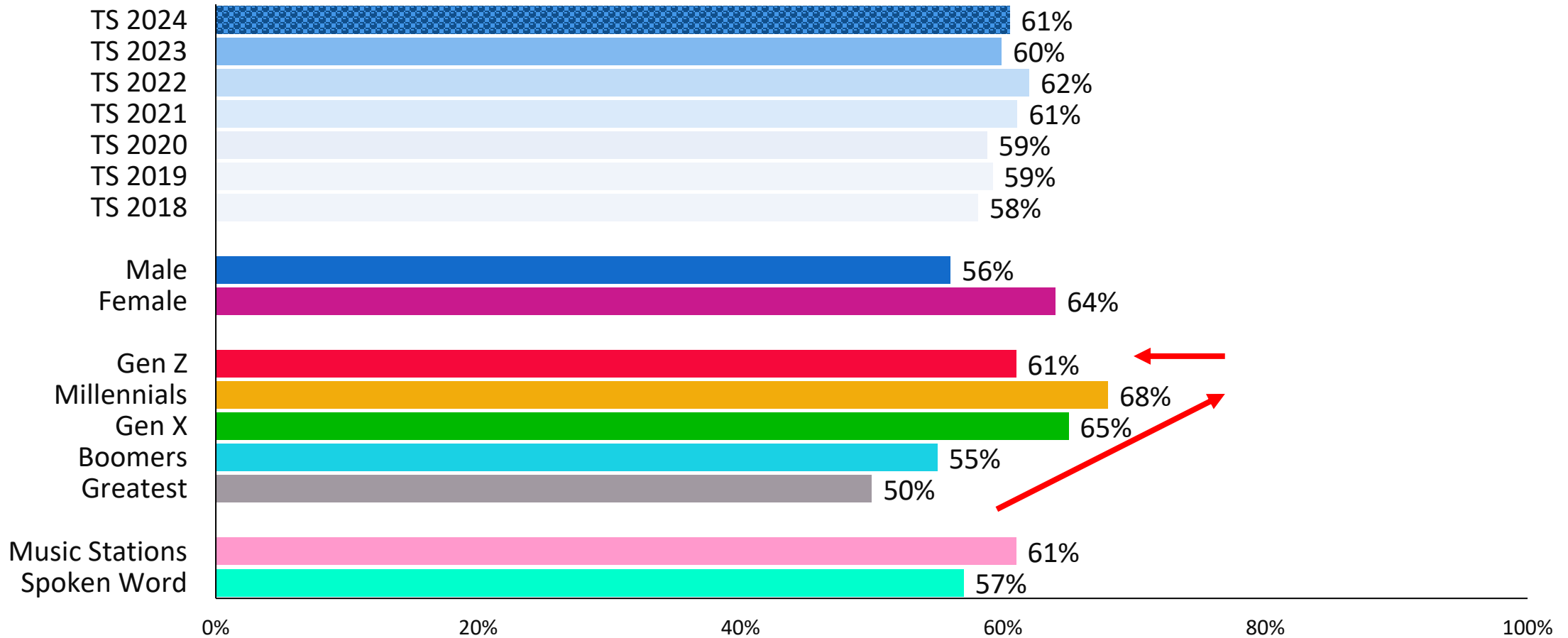
Personalities Still Outpace Music in Appeal, But It Remains Close



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

Personality Appeal Is Highest Among Women and Progressively Younger Generations

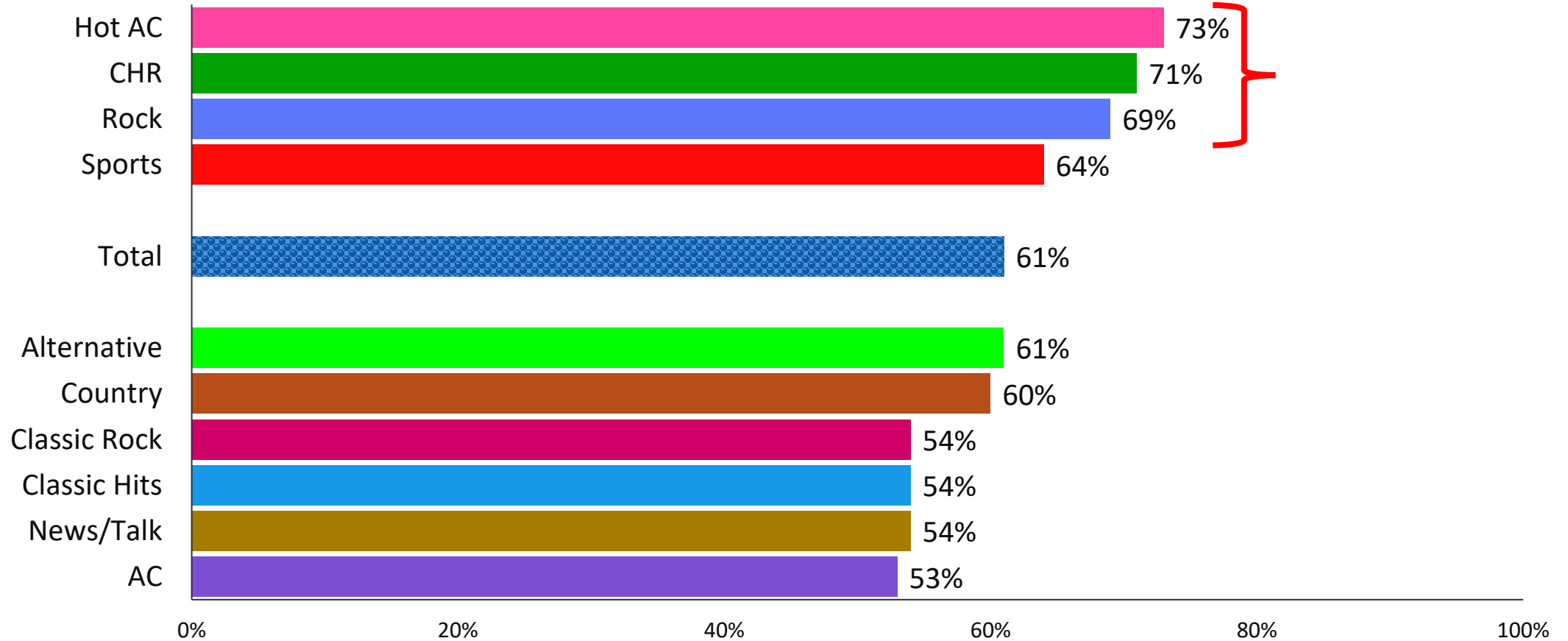
“I Like Particular DJs, Shows, or Hosts”



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

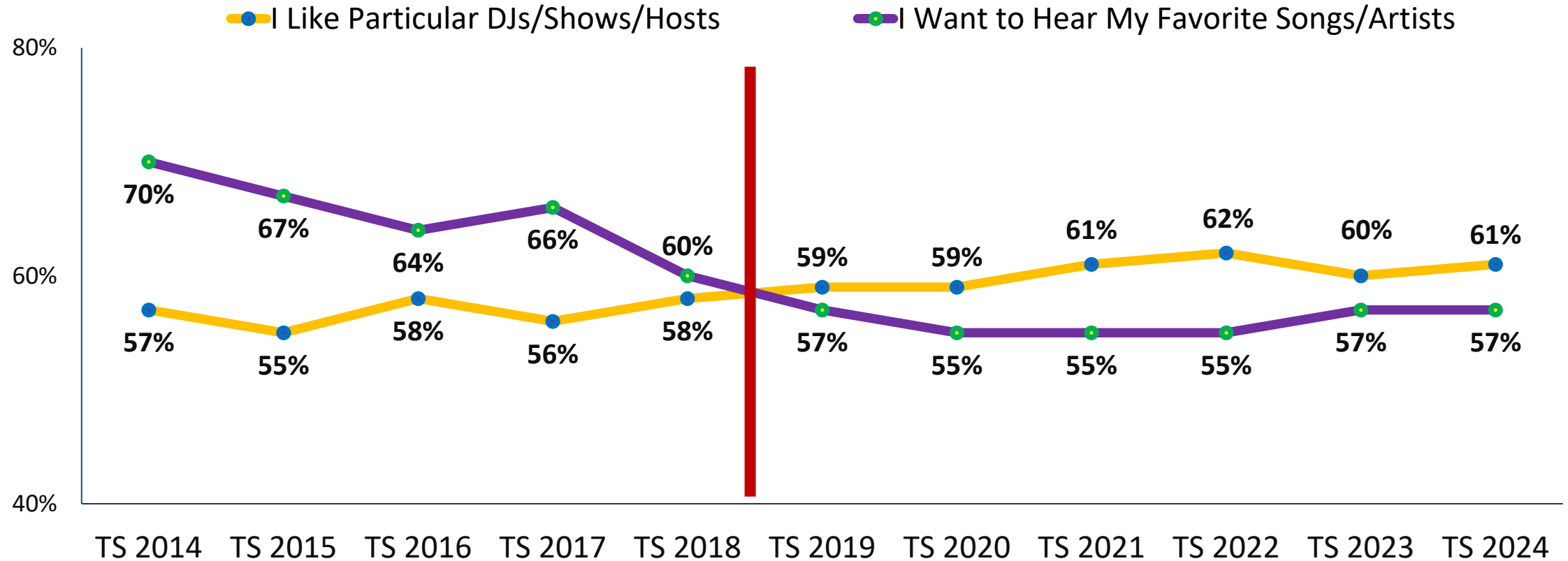
Personality Appeal Is Highest Among Hot AC, CHR, and Rock Partisans

“I Like Particular DJs, Shows, or Hosts”



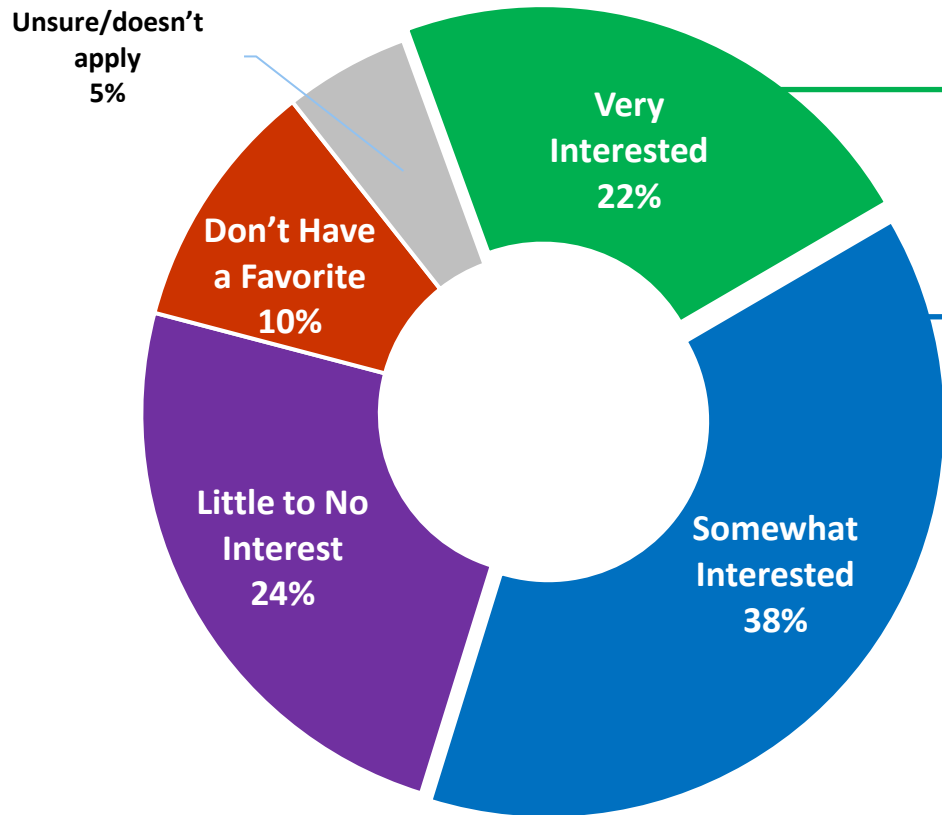
Among those who listen to AM/FM radio,
% by format who say this is a main reason they listen

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

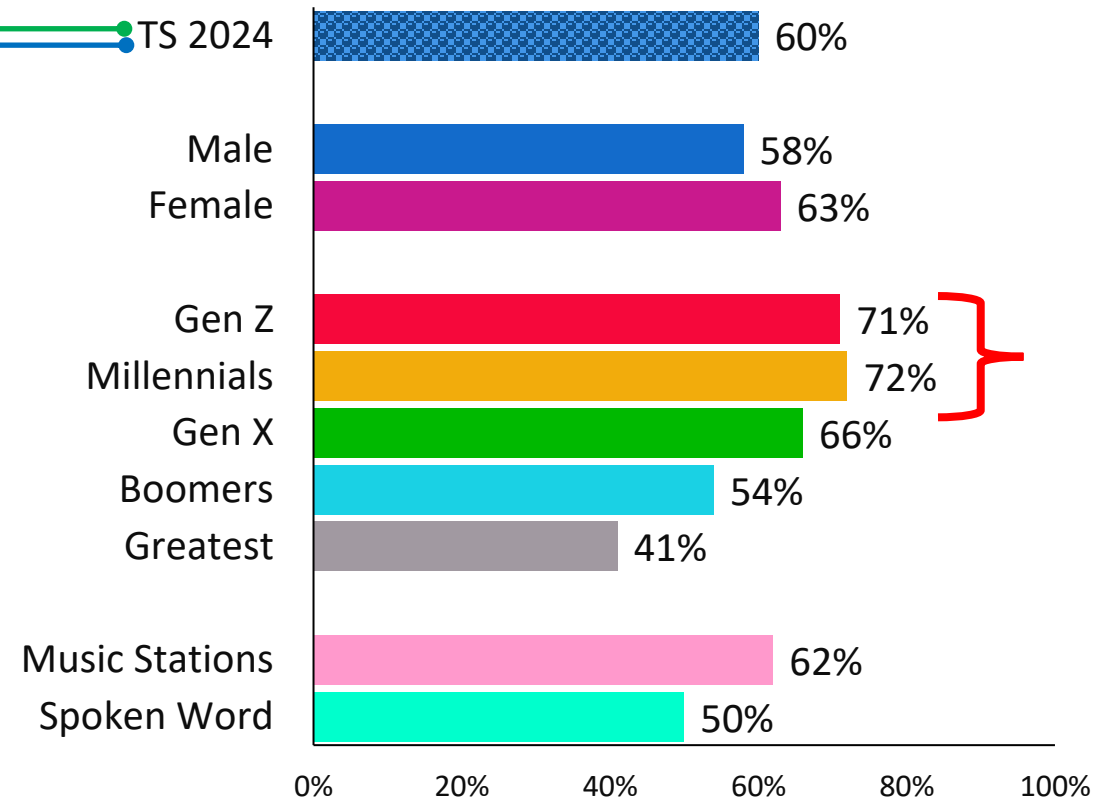


Among those who listen to AM/FM radio,
% who say this is a main reason they listen

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

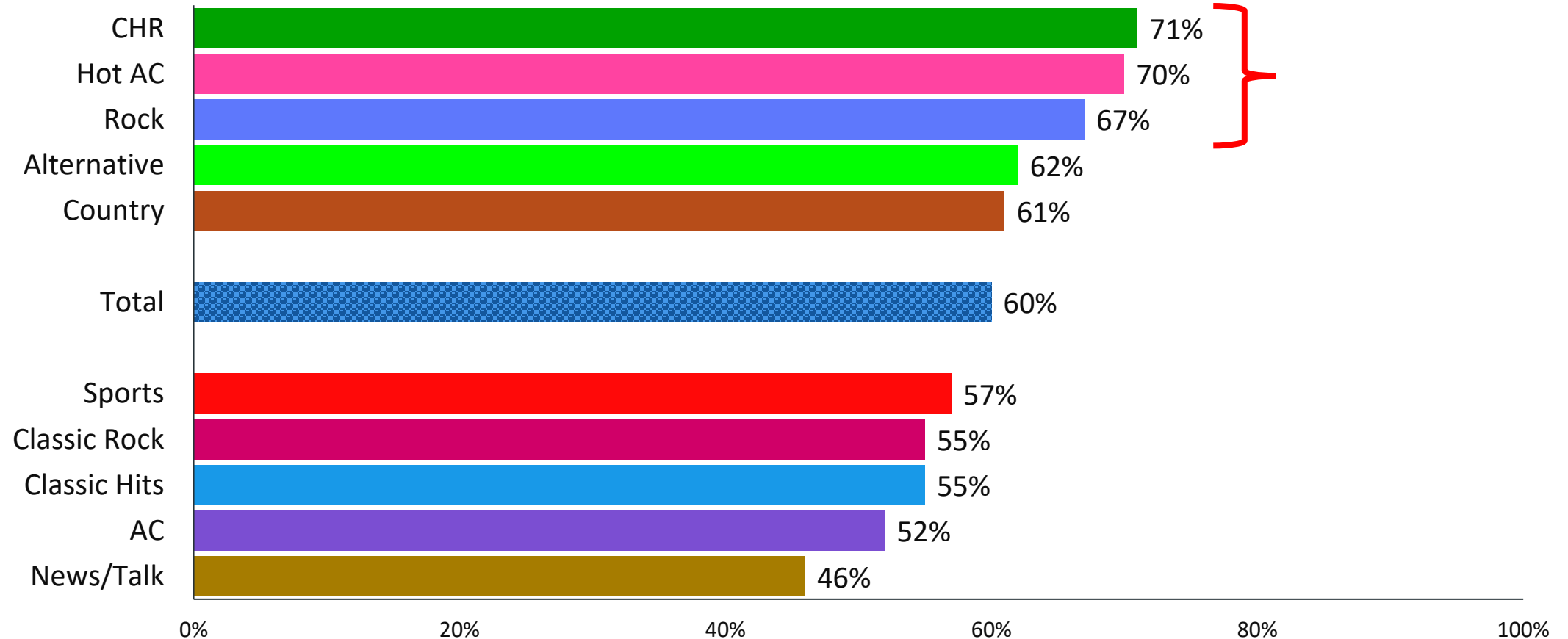


% Interested (Very + Somewhat) in Connecting With a Favorite Personality/Show/Host/DJ



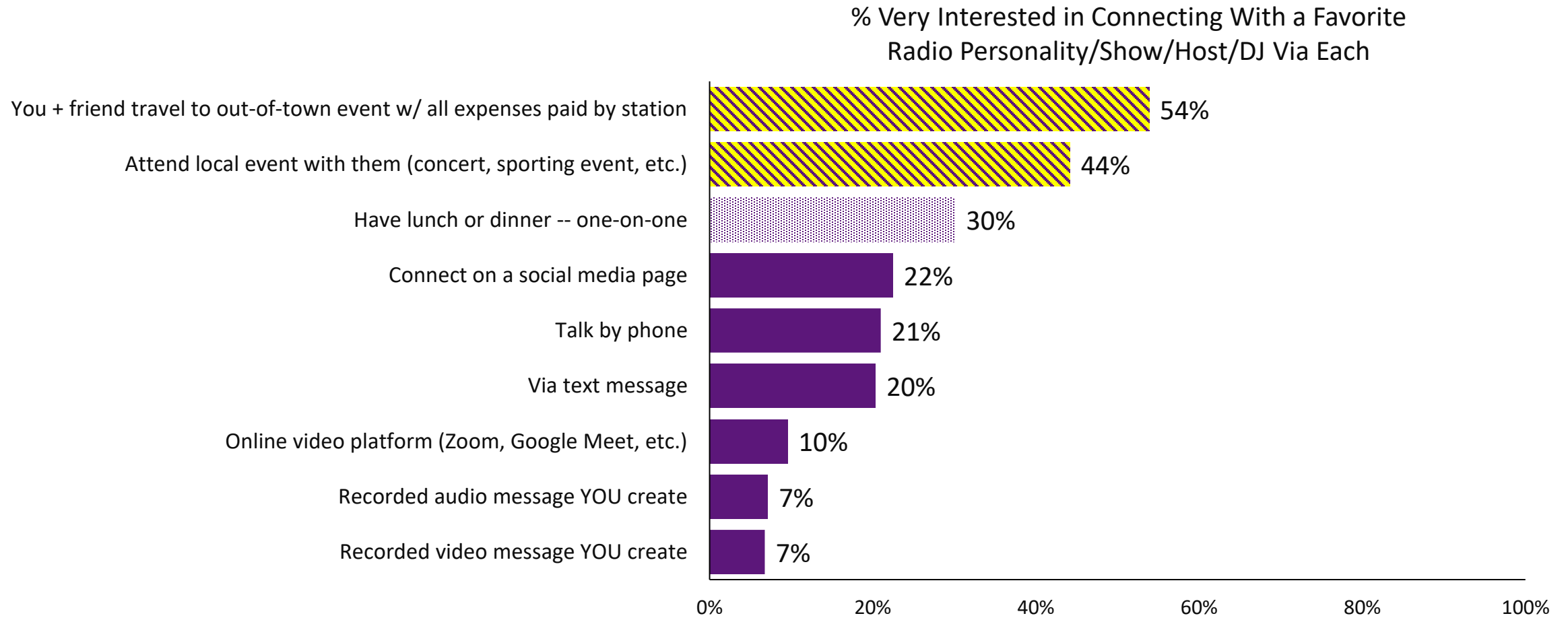
“Other than listening on the radio, how interested are you in connecting with a favorite radio PERSONALITY/SHOW/HOST/DJ?”

CHR, Hot AC and Rock Fans Are Most Interested in Connecting With Their Favorite On-Air Talent



% by format, interested (very + somewhat) in connecting with a favorite personality/show/host/DJ, other than on the radio

Events (Locally and Out-of-Town) and Sharing a Meal Are the Ways Listeners Are Most Interested in Connecting with On-Air Talent

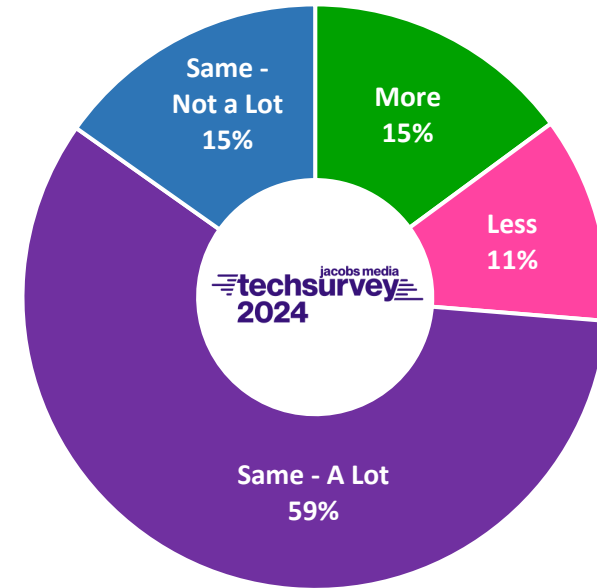
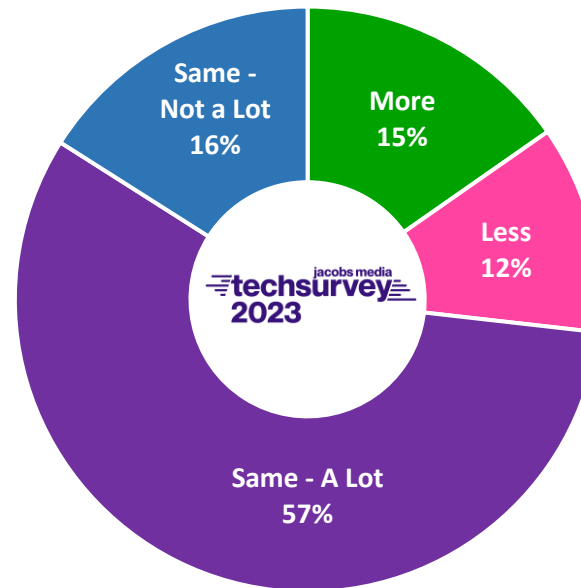
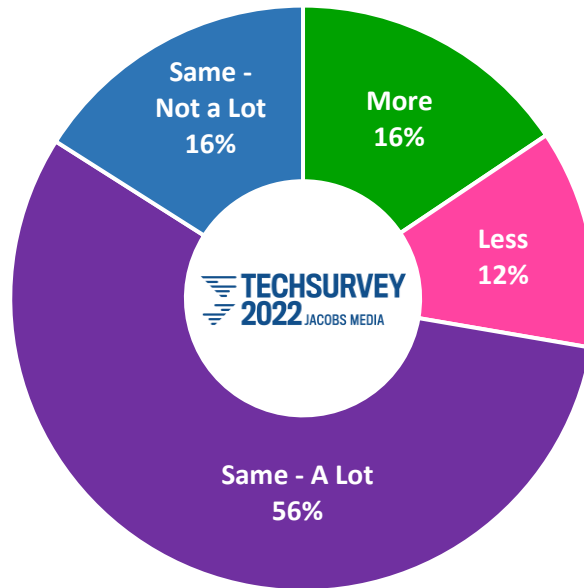
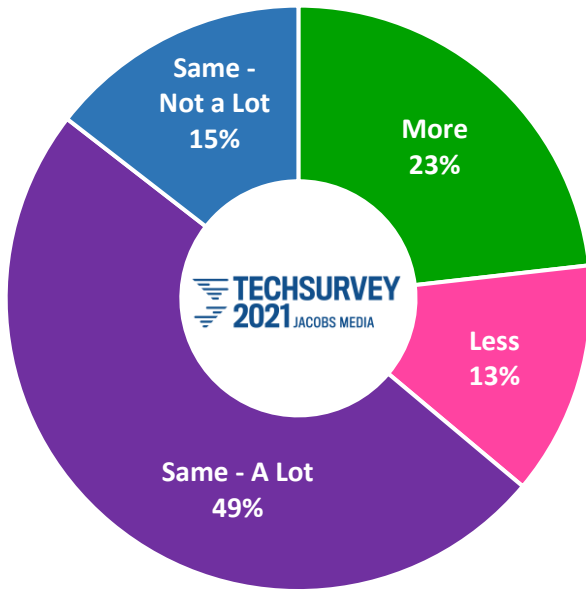


Among those interested (very + somewhat) in connecting with a favorite personality/show/host/DJ, other than on the radio



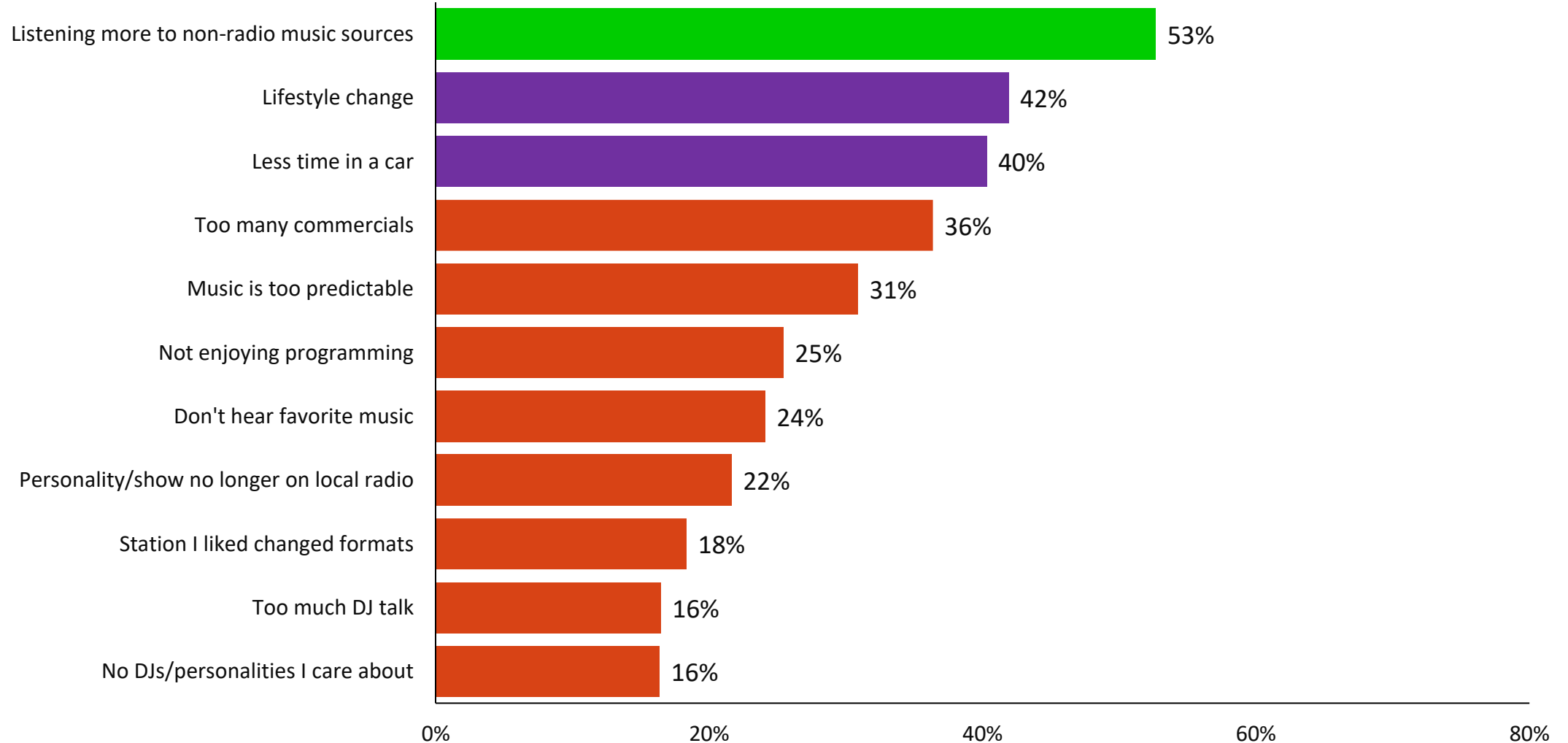
Why are some radio fans listening to LESS radio? (It's a combo of more choices, WFH, and unforced errors.)

AM/FM Radio Listening Momentum Holds Firm Year Over Year, But Down Since Peak COVID



Among those who listen to AM/FM radio

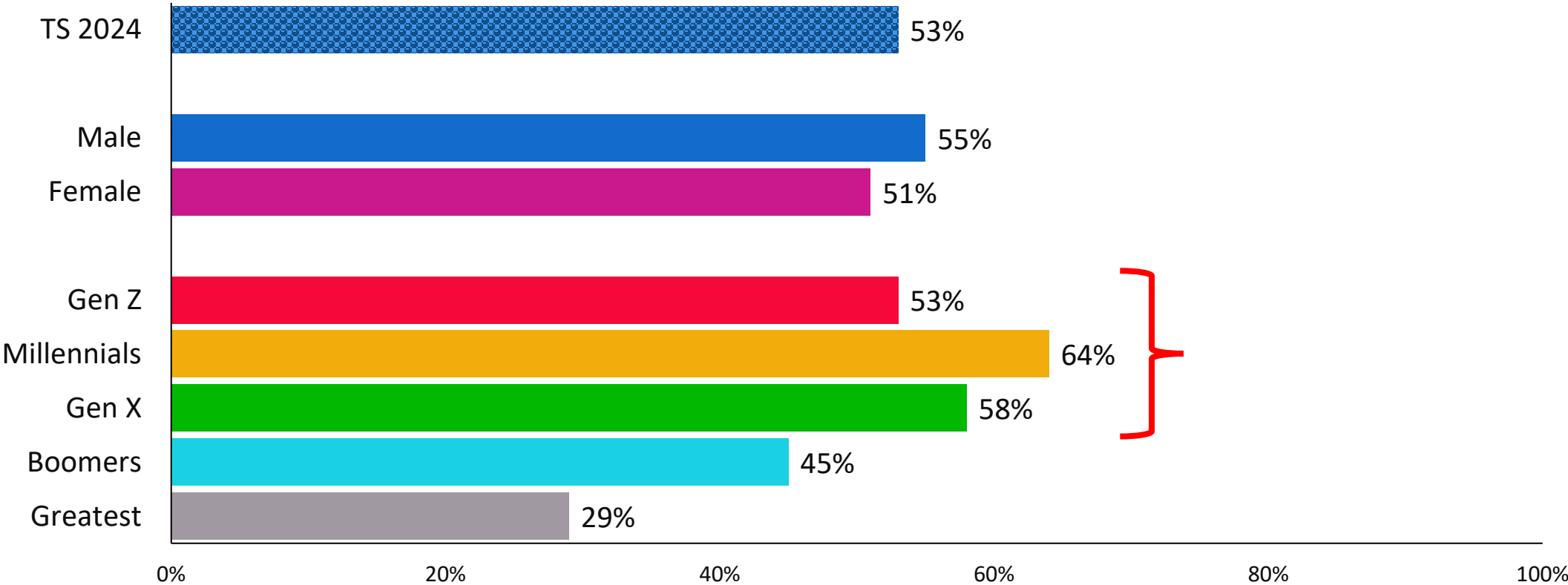
Why Less Radio? More Choices Followed By Lifestyle Changes and Less Time in a Car



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

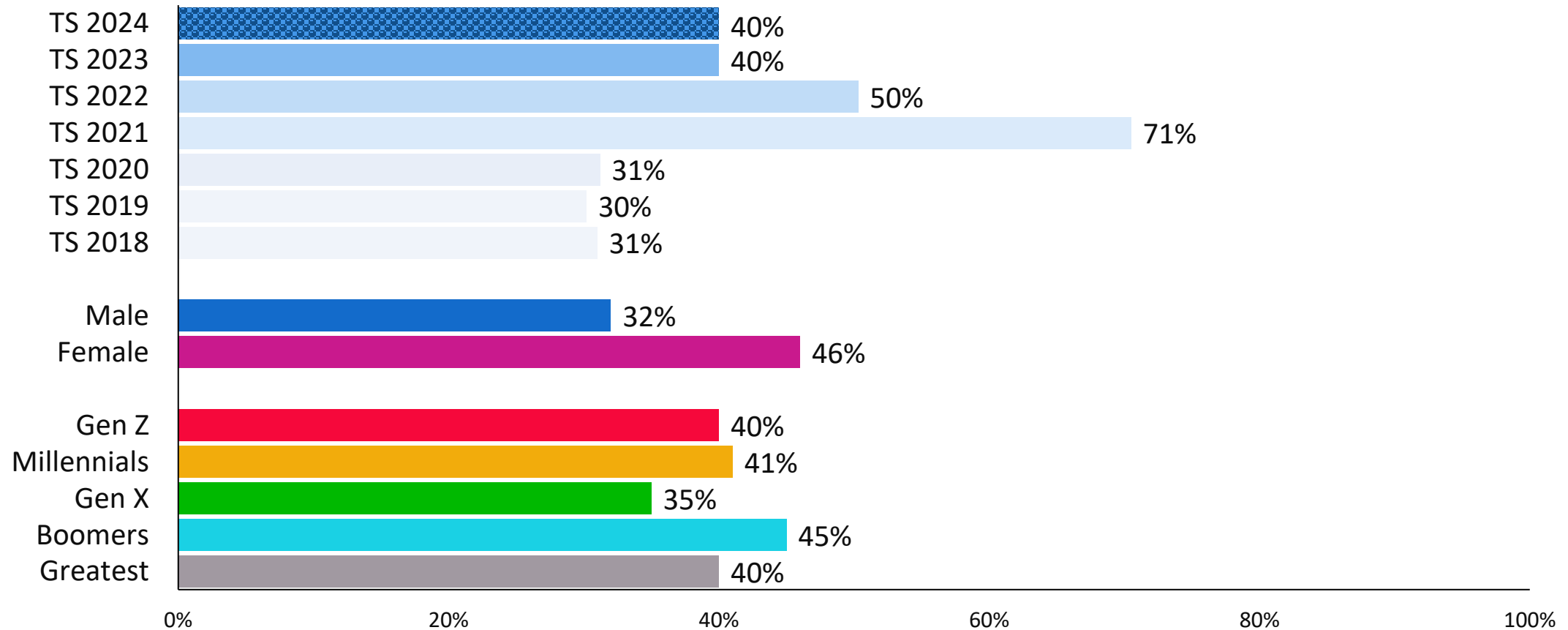
More Music Choice Is a Primary Obstacle to Radio Listening for Gen Z, Millennials, and Gen Xers

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



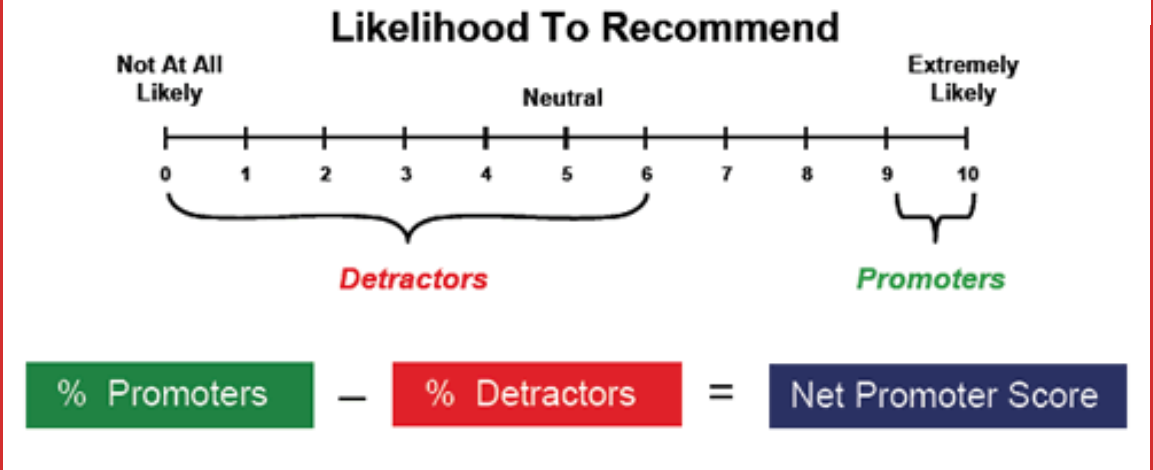
Among those who say they are listening less to AM/FM radio in the past year, % who say this is a main reason they listen less

While Still Not Back to Post-Pandemic Levels, “Less Time Spent In Cars Has Stabilized” *“Spending Less Time in a Car”*



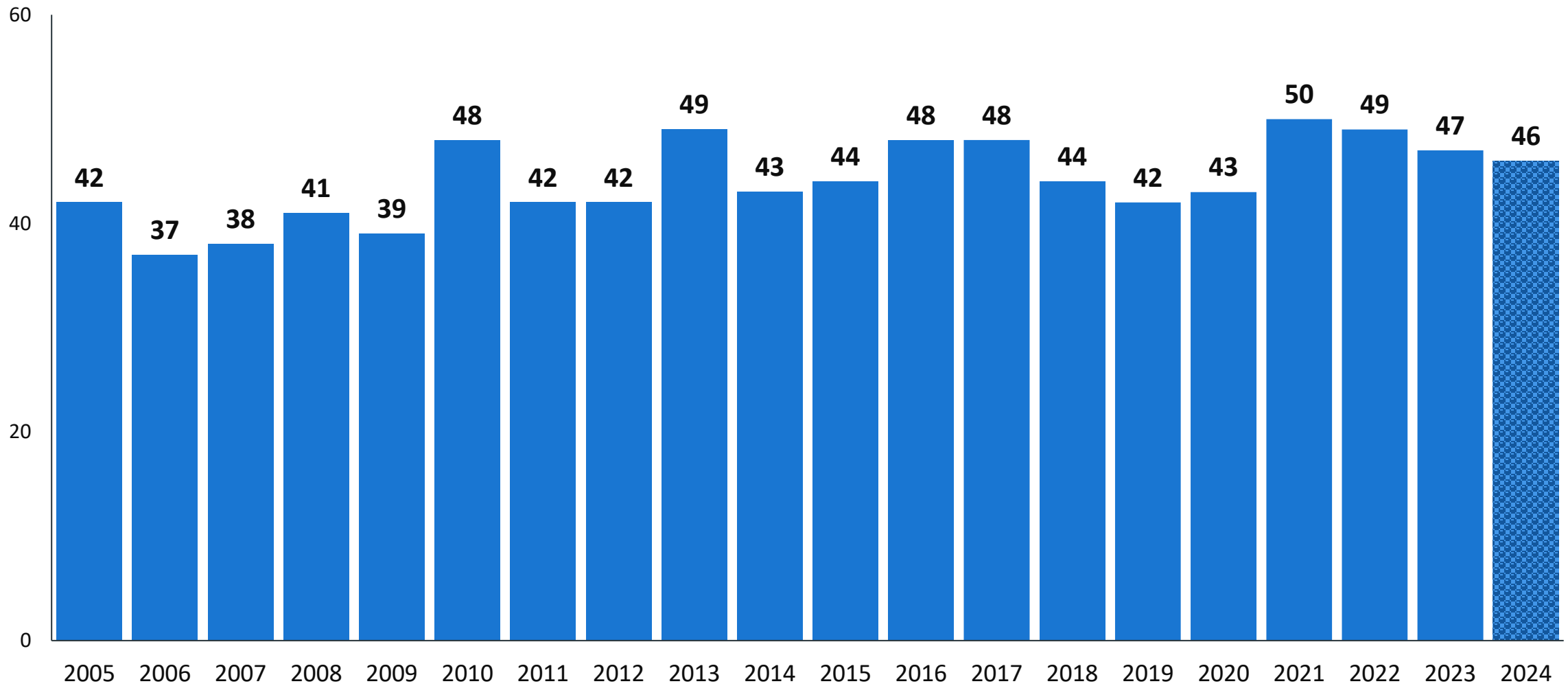
Among those who say they are listening less to AM/FM radio in the past year, % who say this is a main reason they listen less

NET PROMOTER

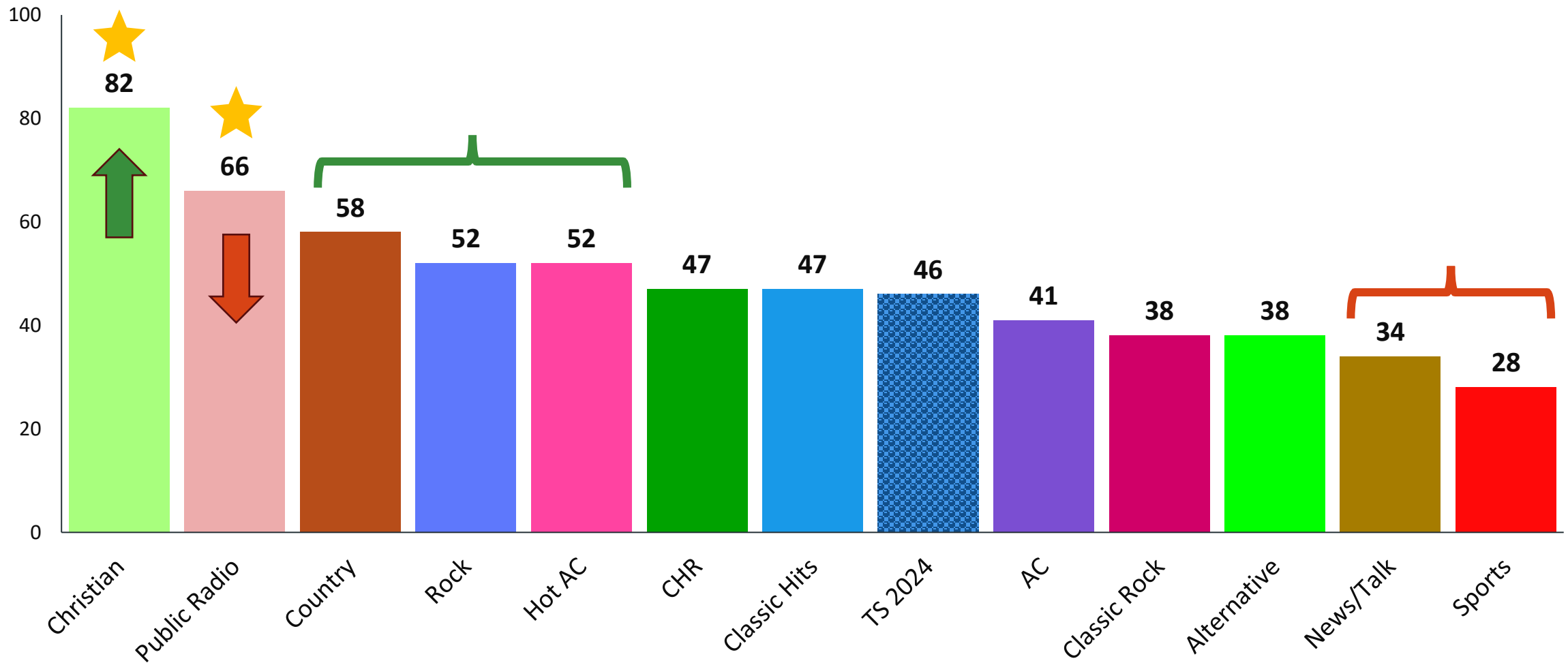


Radio's word-of-mouth scores (Net Promoter) continue to take a post-pandemic dip but remain solid.

In 20 Years of NPS, 2024 Beats the Average of 44



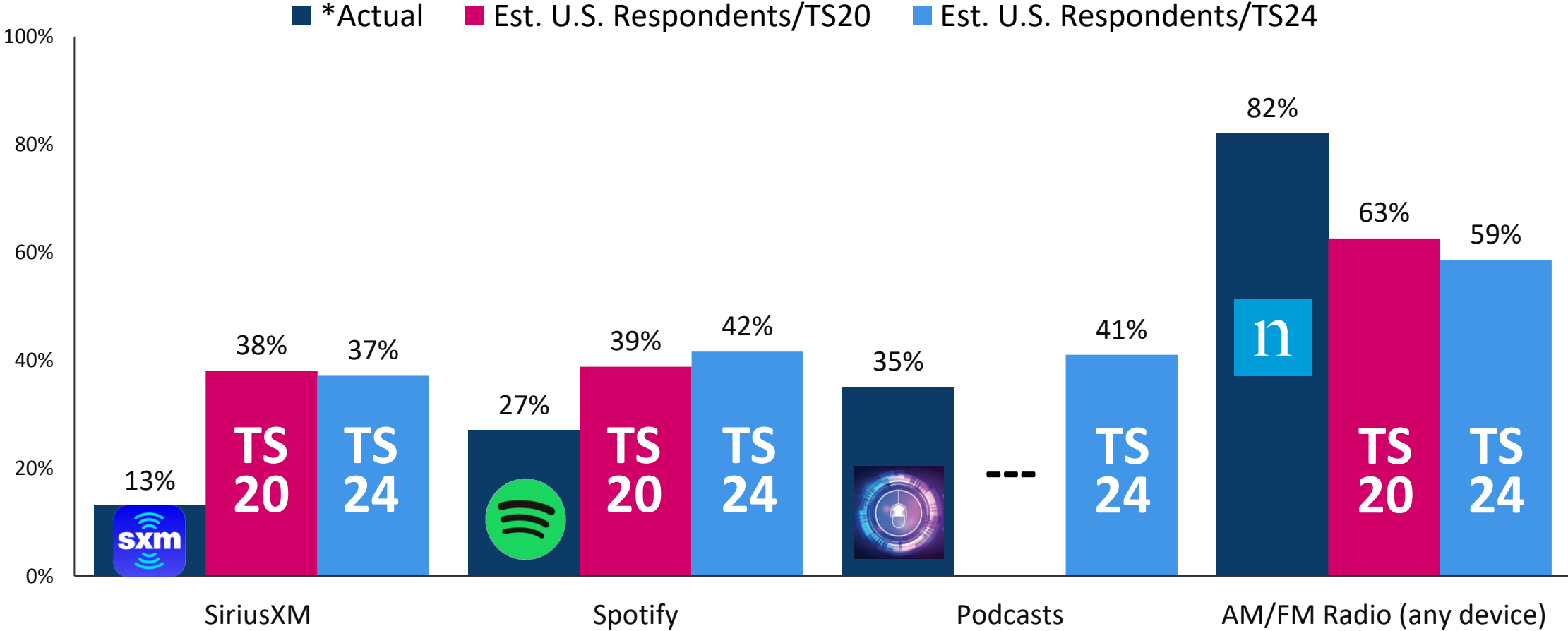
As Usual, Christian Radio Leads NPS; Country, Rock, and Hot AC Fans Are the Best “Recommenders” in Commercial Radio





Audio Platforms: Perception vs. Reality

Core Radio Listeners Grossly Underestimate AM/FM Radio Listening (and Overestimate Spotify, SiriusXM, and Podcasts)



*Among U.S. respondents, Jacobs data is estimated weekly 18+ U.S. population; actual Spotify/Podcasts are age 18+, courtesy of 2024 Infinite Dial from Edison Research; SiriusXM data among subscribers as of 4/24; Nielsen 18+ adults

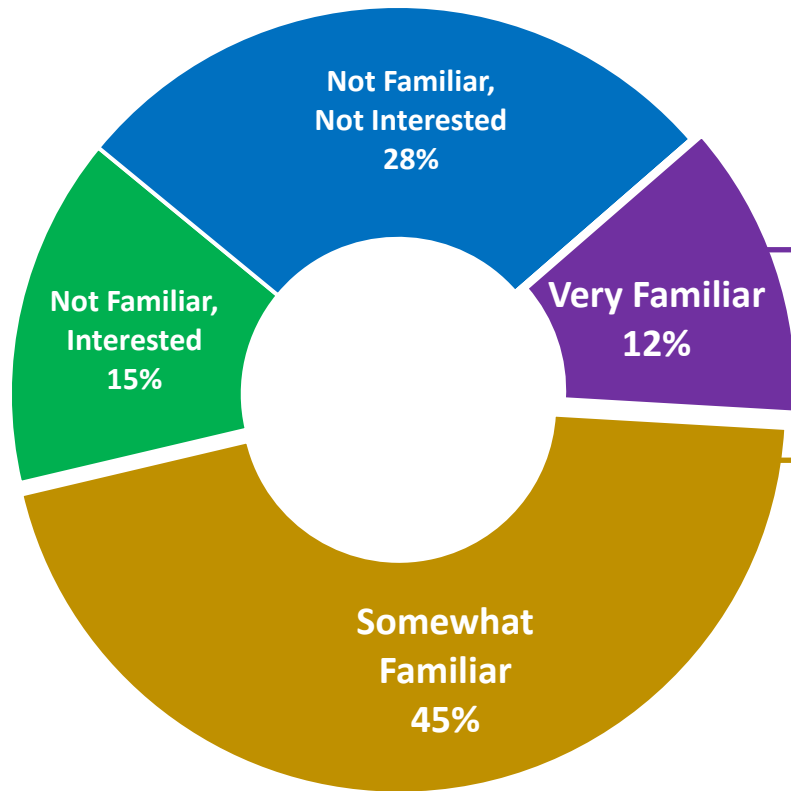
**Hey, Radio...
You might want
to pump the
brakes a bit.**



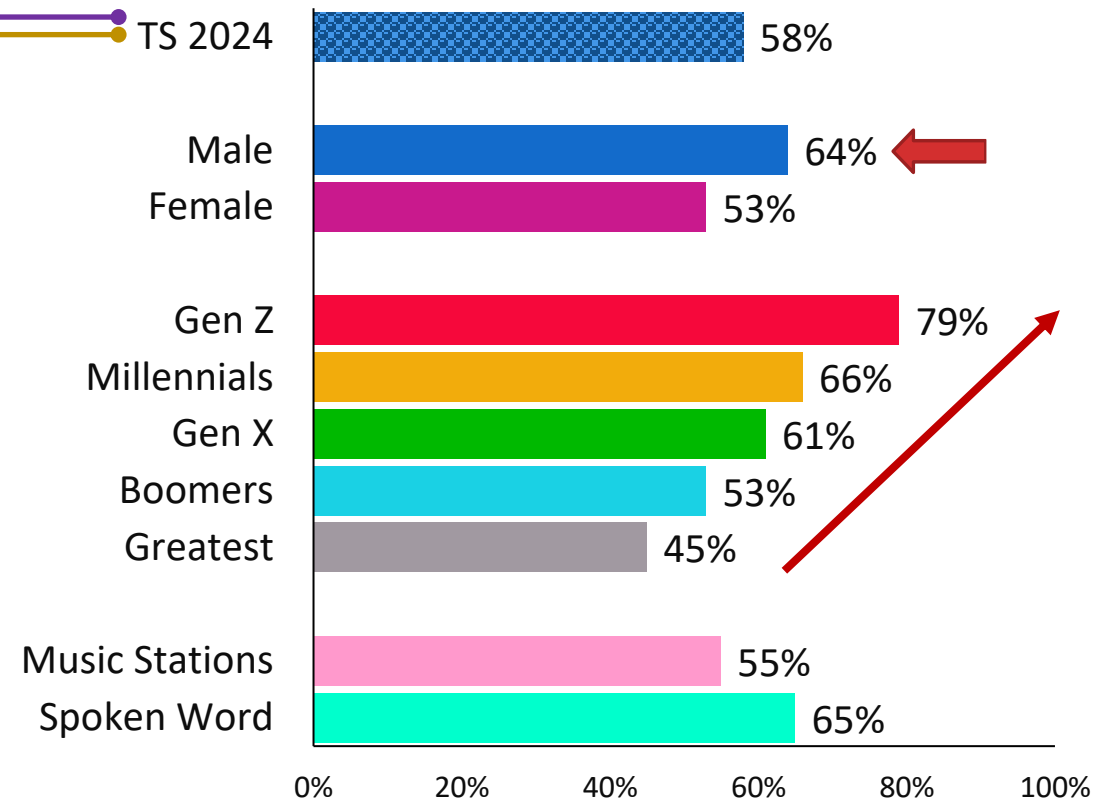


The 800 lb. Gorilla: Artificial Intelligence

Just Under Six in Ten Are Familiar With AI, Especially Men, Progressively Younger Listeners, and Spoken Word Fans

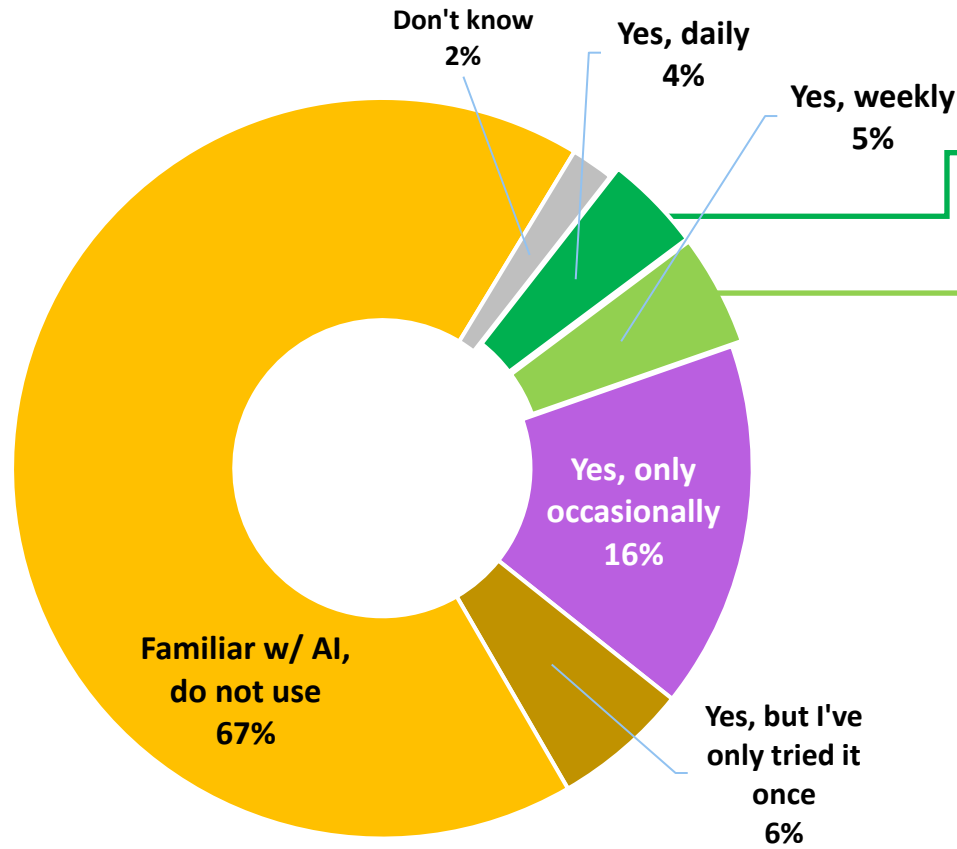


% Familiar (Very + Somewhat) With Forms of Artificial Intelligence (AI)

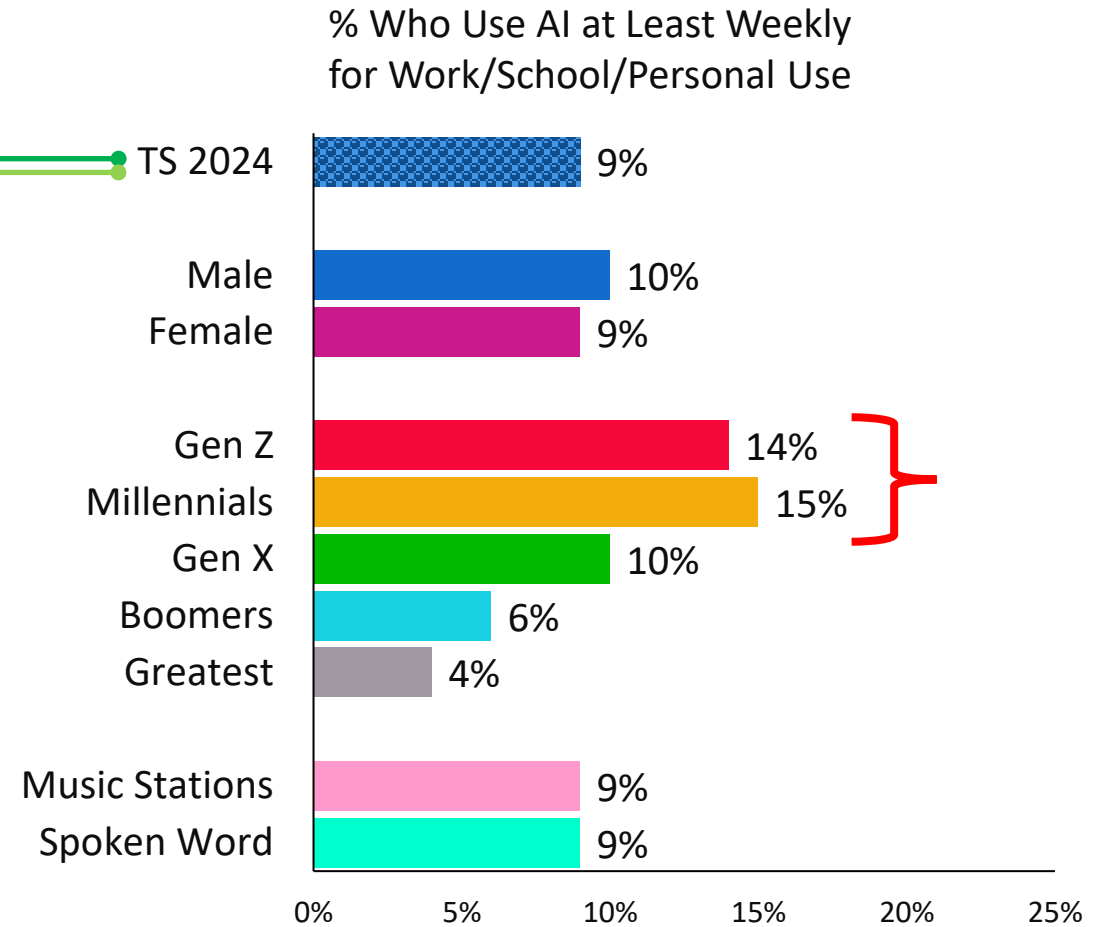


“AI applications can be used in various forms, including creating realistic images, cloning voices, writing copy, and organizing content. In general, are you familiar with these (and/or other) forms of AI?”

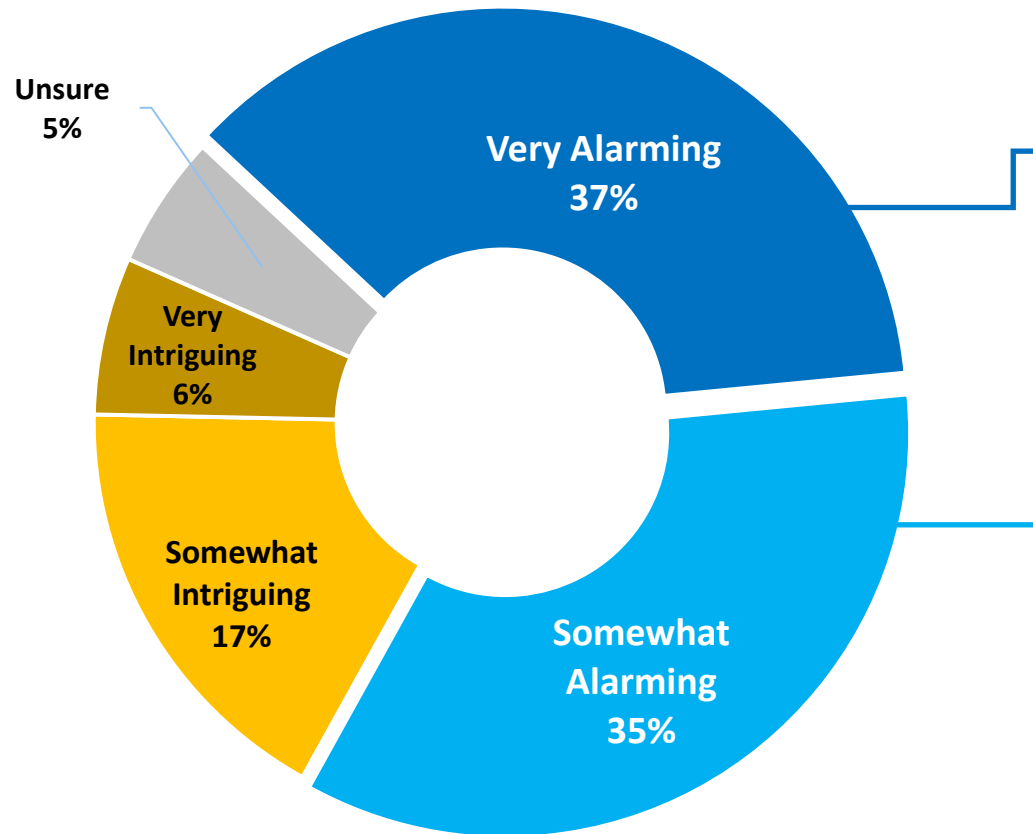
Fewer Than One in Ten Uses AI at Least Weekly for Work/School/Personal, Led By Millennials and Gen Zs



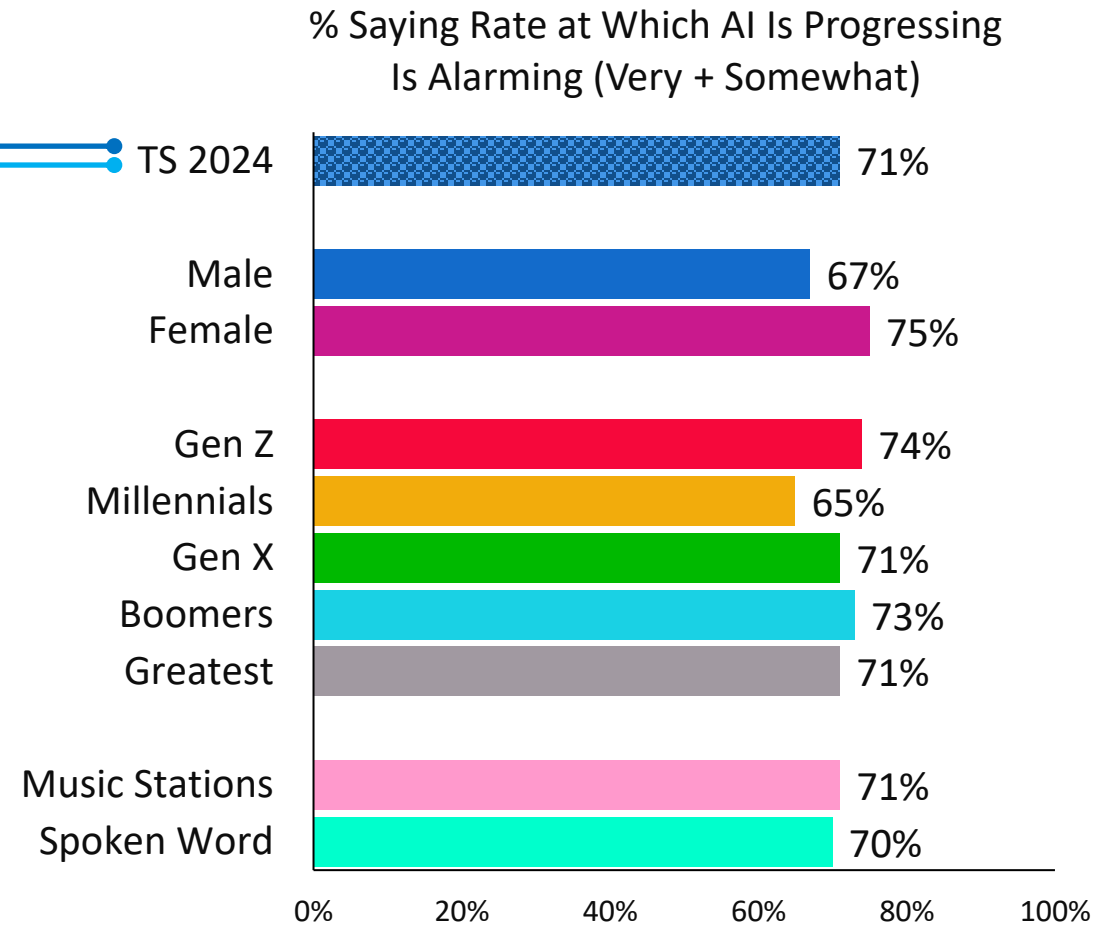
"Do you use any AI platforms or applications for work/school/personal use?"



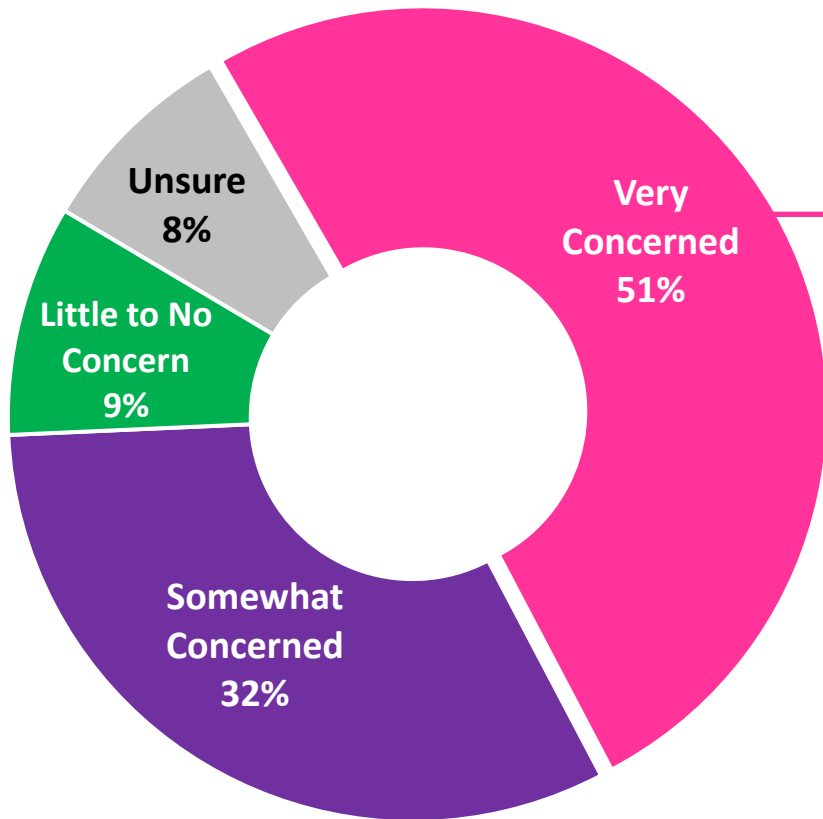
There Is a High Level of Alarm Regarding AI's Rapid Growth Across Most Demographics



*"Based on what you know about 'AI,' which comes closest to your opinion?
The rate at which AI is progressing is:"*

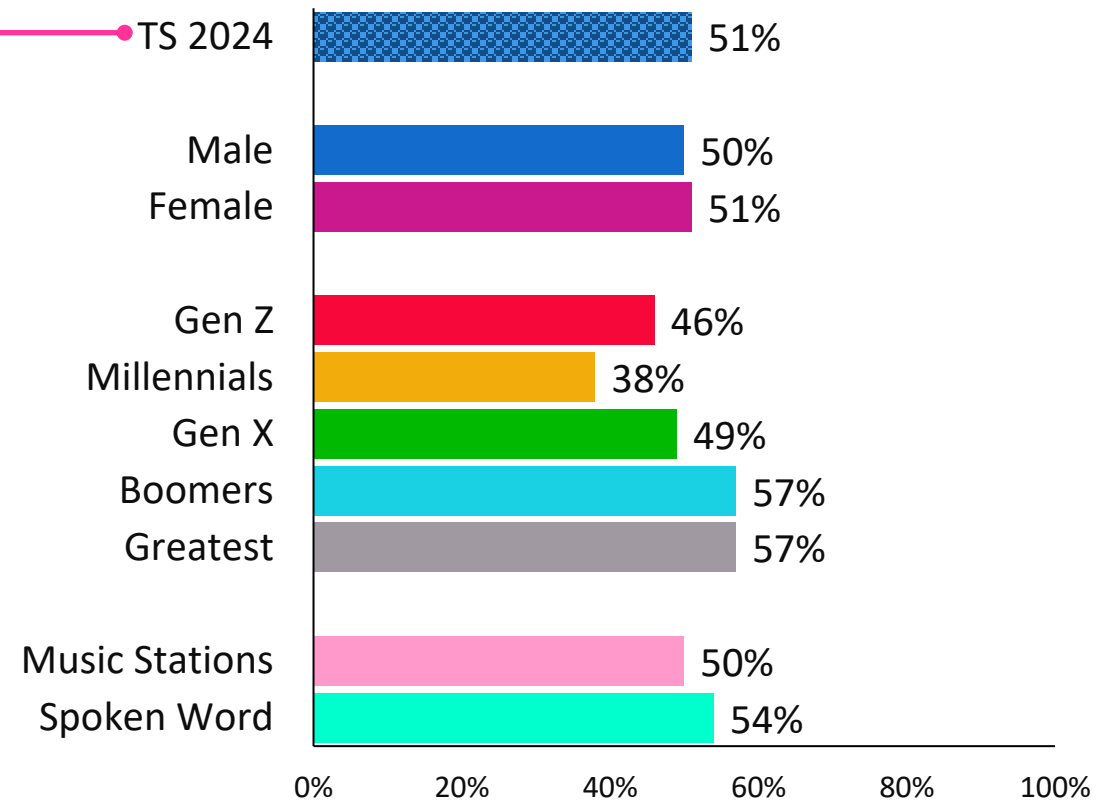


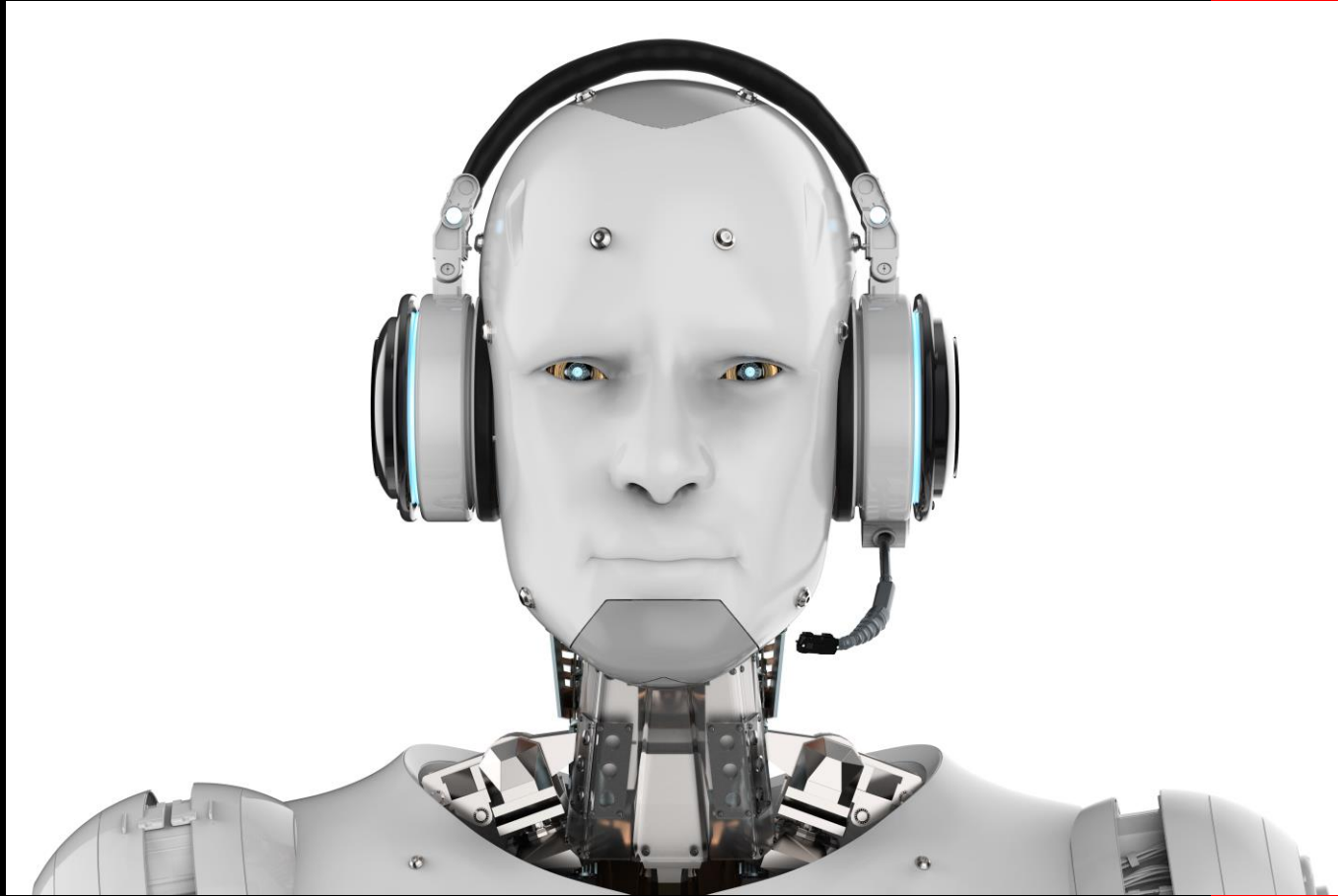
Most Are Highly Concerned About AI's Potential to Influence 2024 Elections



"Which of the following best describes how you feel about AI and its potential to influence upcoming 2024 elections?"

% Who Are Very Concerned With the Potential of AI to Influence 2024 Elections

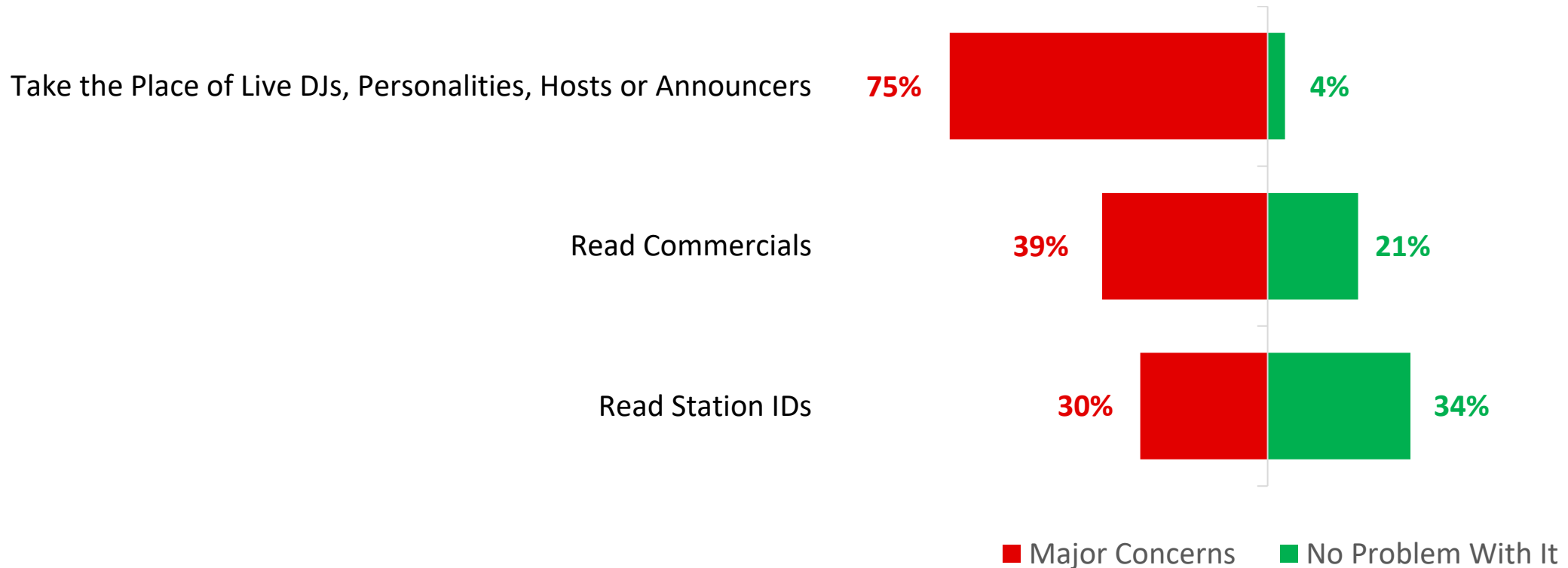




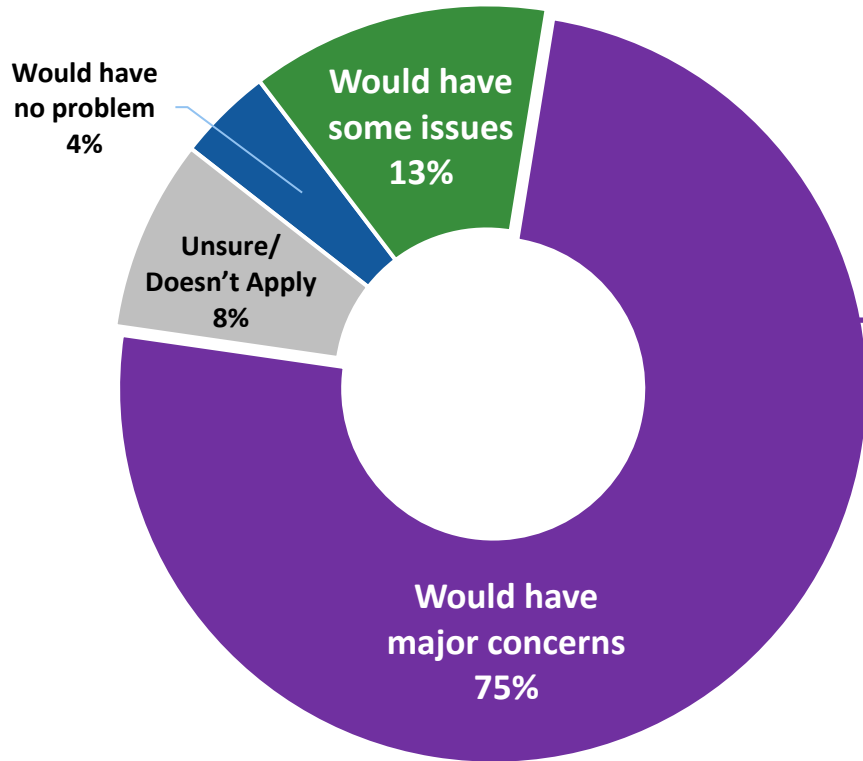
**How can AI
technology be
used by
commercial
radio stations?**

Using AI Technology in Place of Live DJs/Hosts Is a Major Concern For Most Core Radio Listeners

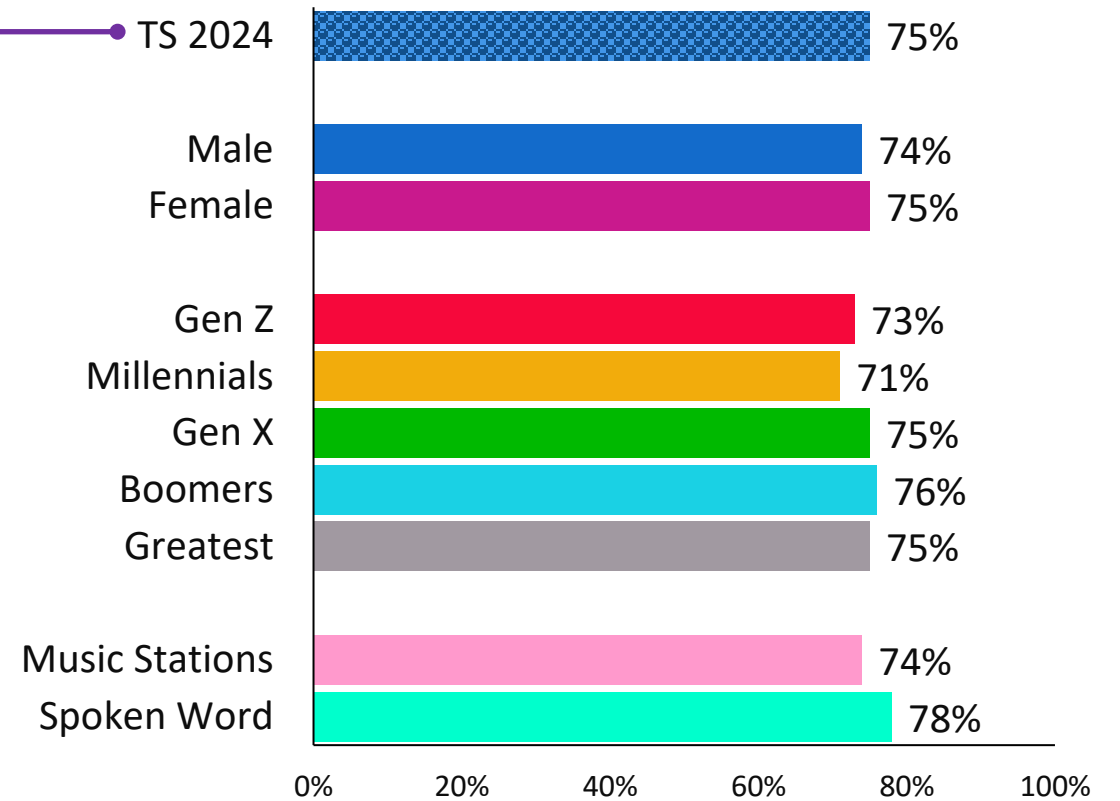
*“One of the applications of AI technology is its ability to clone voices – that is, to make artificial voices sound human and/or to copy a familiar personality’s voice. Some stations are thinking about how they might use AI in the future. If a station you listen to used AI voice technology to **(item)**, which of the following best describes your opinion?”*



Three in Four Express Major Concerns Over AI Voice Technology Taking the Place of On-Air Talent



% Saying They Would Have "Major Concerns"



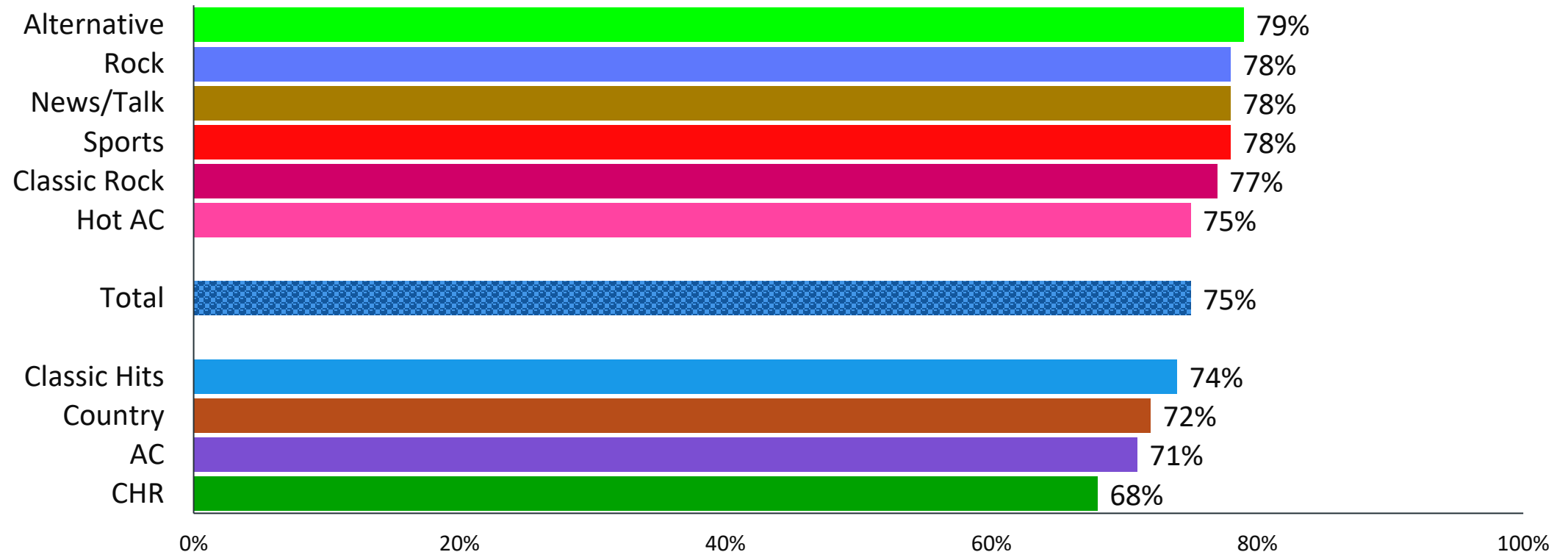
"One of the applications of AI technology is its ability to clone voices – that is, to make artificial voices sound human and/or to copy a familiar personality's voice."

Some stations are thinking about how they might use AI in the future. If a station you listen to used AI voice technology to TAKE THE PLACE OF LIVE DJs, PERSONALITIES, HOSTS, or ANNOUNCERS, which of the following best describes your opinion?"

Most Format Fans Express Major Concerns Over AI Voice Technology Taking the Place of On-Air Talent

“One of the applications of AI technology is its ability to clone voices – that is, to make artificial voices sound human and/or to copy a familiar personality’s voice.

Some stations are thinking about how they might use AI in the future. If a station you listen to used AI voice technology to TAKE THE PLACE OF LIVE DJs, PERSONALITIES, HOSTS, or ANNOUNCERS, which of the following best describes your opinion?”

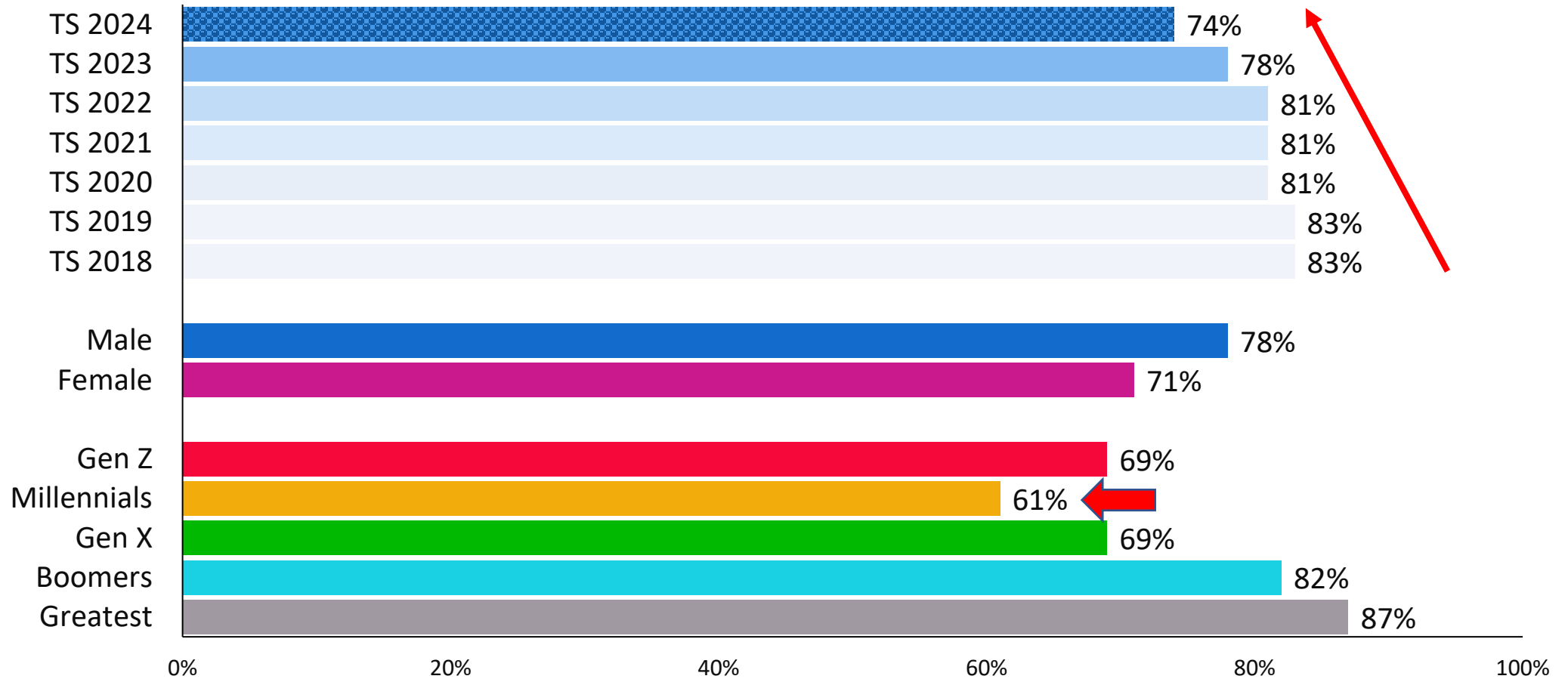


% by format saying they would have “major concerns”



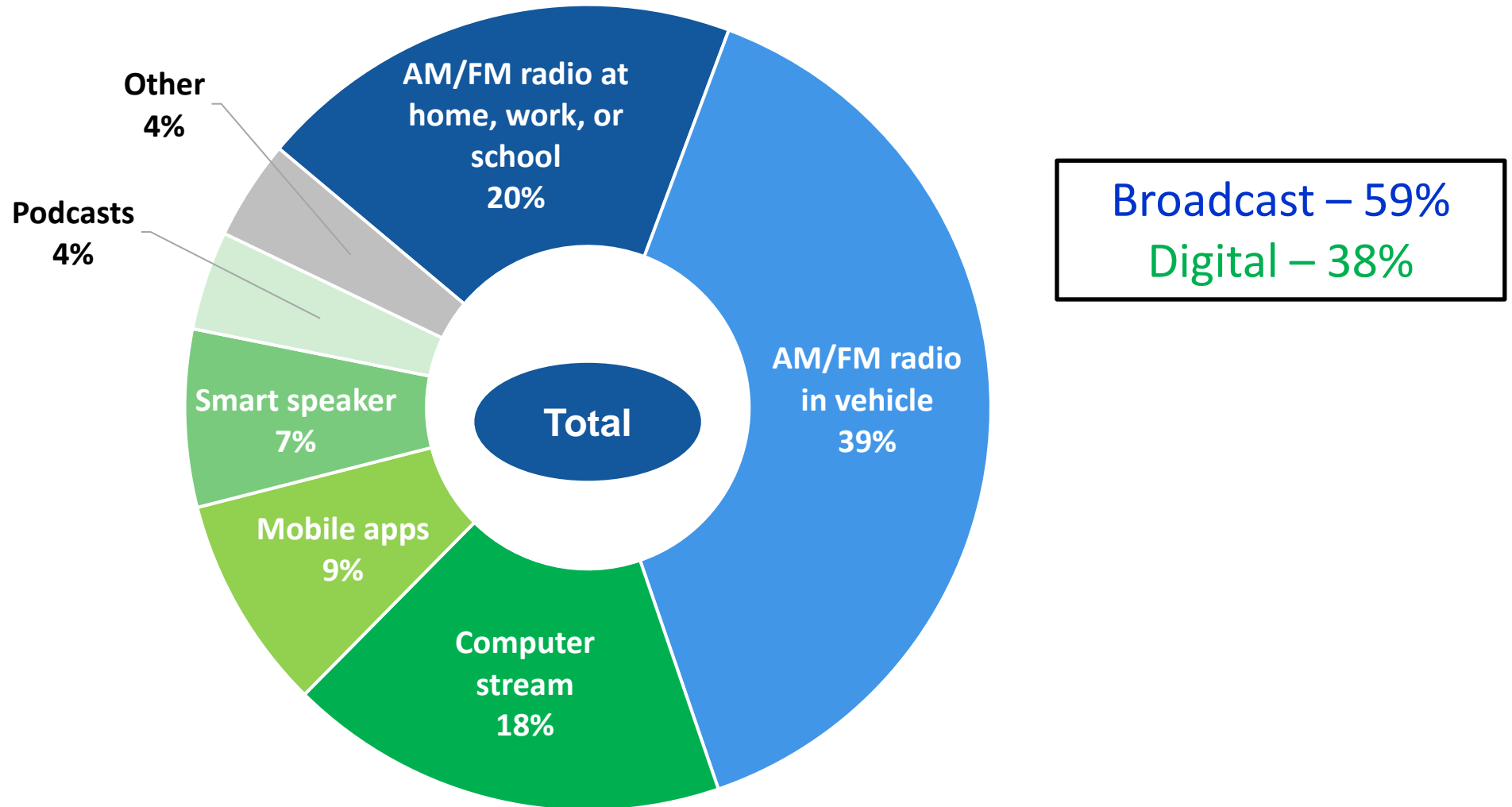
Digital continues to play a key role in AM/FM radio usage, but the transformation IS slowing.

Fewer Than Three in Four Now Have a Regular Radio Where They Live, Much Less So For Millennials

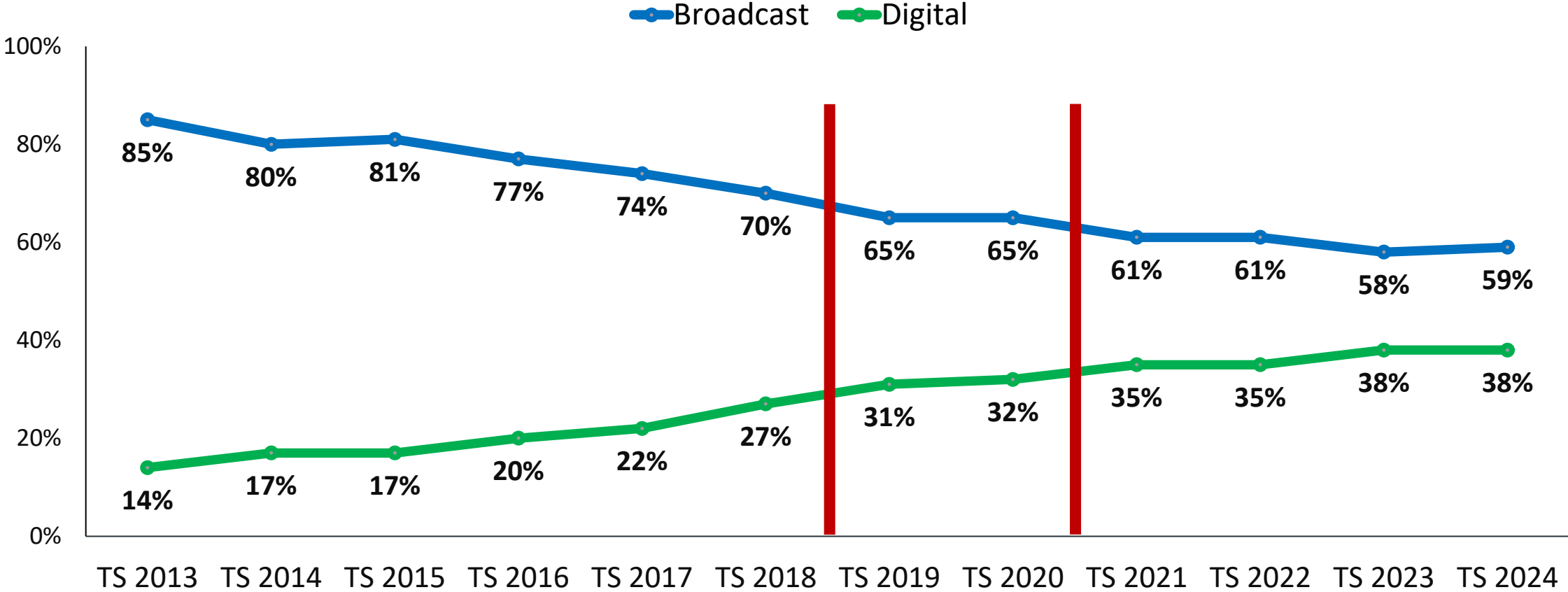


% with a regular radio in working condition where they live that they use

How Do Radio Fans Listen to Their Favorite Stations? Digital Platforms Hit a Pause, at Just Under Forty Percent



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)



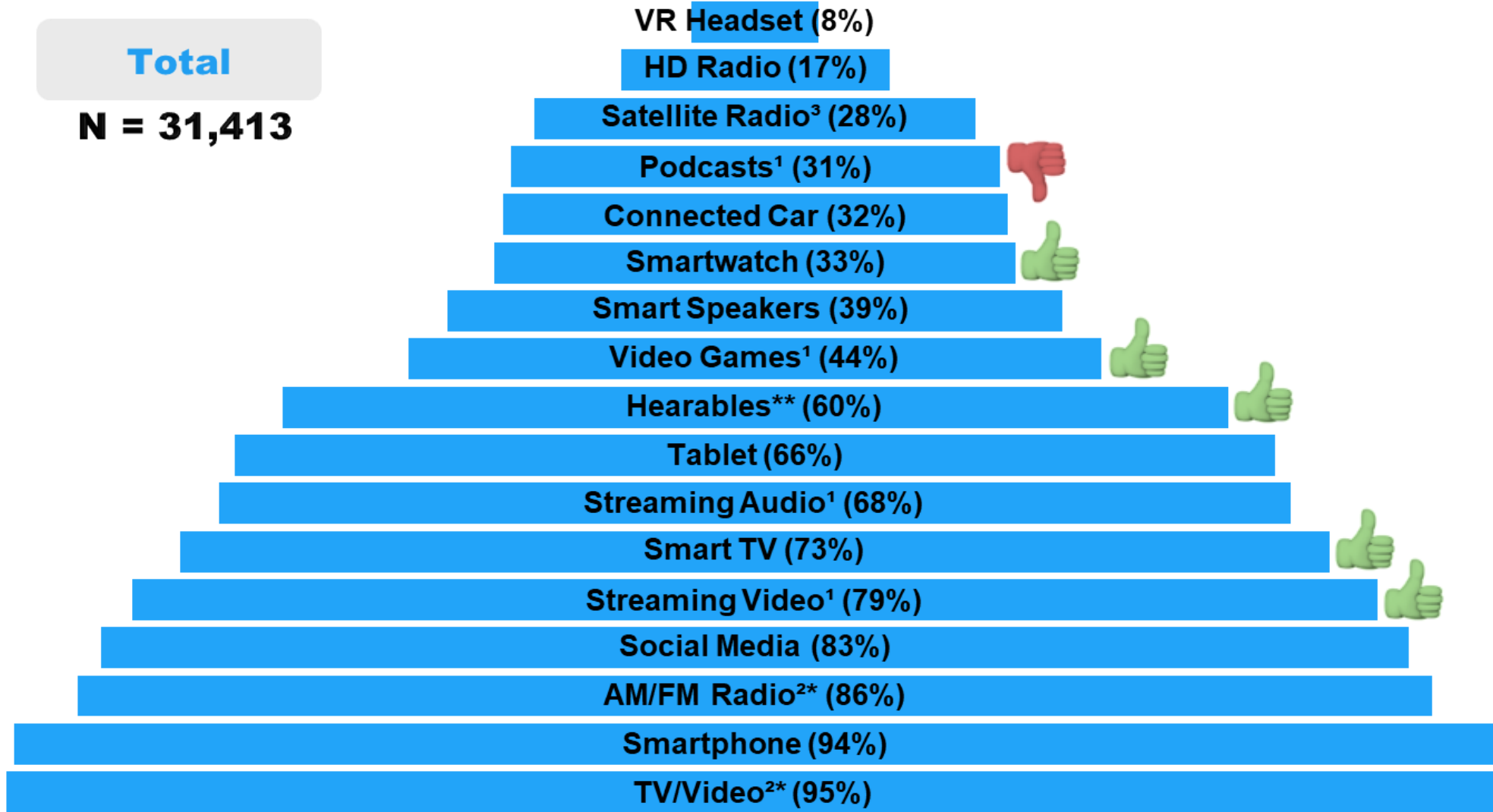
For radio, it's about meeting the audience where they are, making content available on the devices that matter, AND setting priorities.



Media Pyramid 2024

Total

N = 31,413



Total TS 2023
7%
16%
28%
33%
32%
29%
38%
42%
58%
66%
68%
70%
77%
84%
86%
94%
94%

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



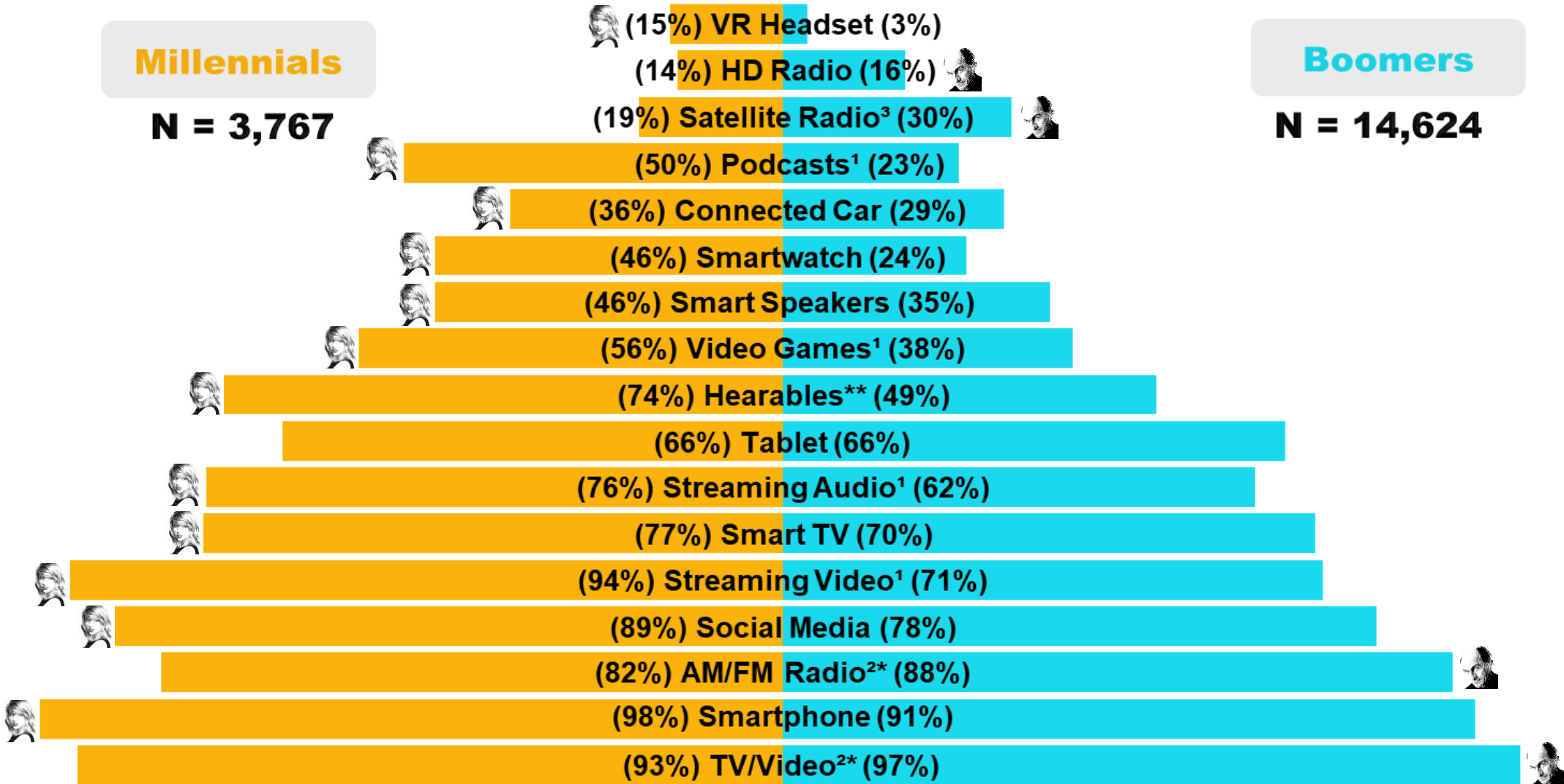
Media Pyramid 2024

Millennials

N = 3,767

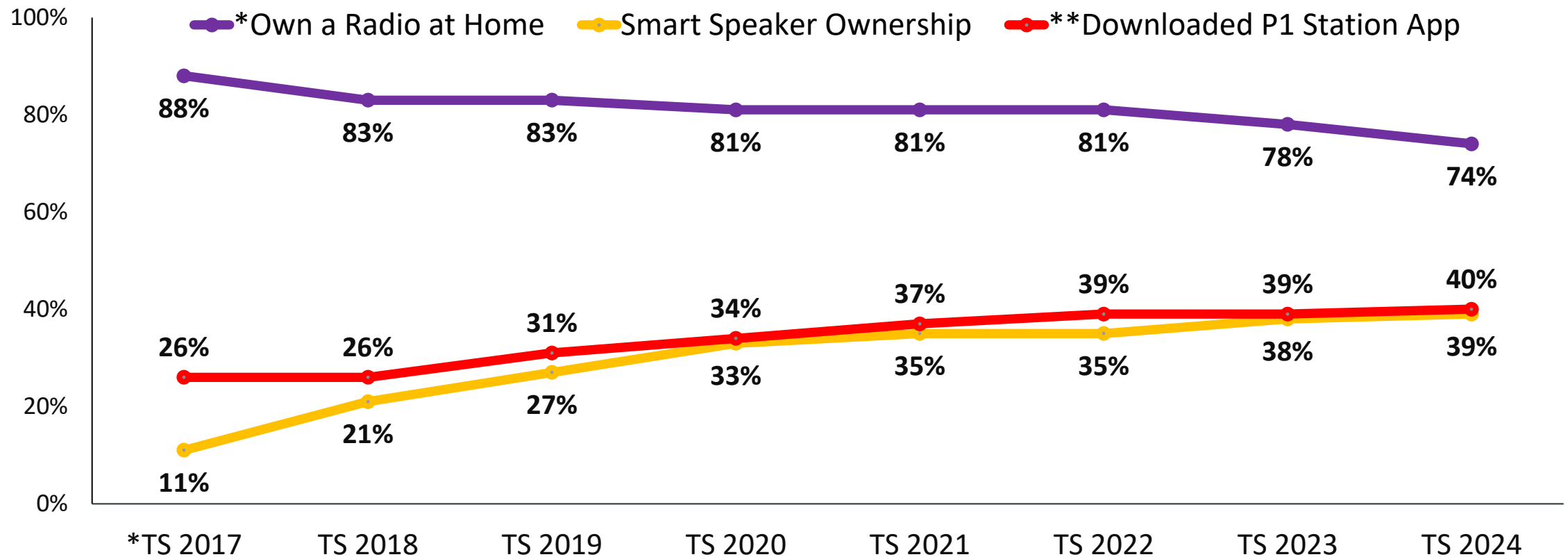
Boomers

N = 14,624



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

As “Regular Radios” Disappear in Homes, Smart Speakers and Mobile Keep 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)

Edison Data Shows The Car Remains One Of The Best Places To Reach Young Listeners.

The summer travel season is right around the corner, and there is a good bet that broadcast radio will be along for the ride. Edison Research says as much as younger demographics are using streaming services, its latest Share of Ear data shows that the in-car environment is where AM/FM radio is most likely to reach 13-to-34-year-olds.

Edison says of those who listen to any radio, 56% of them only listen while they are in a vehicle. [Read more](#)

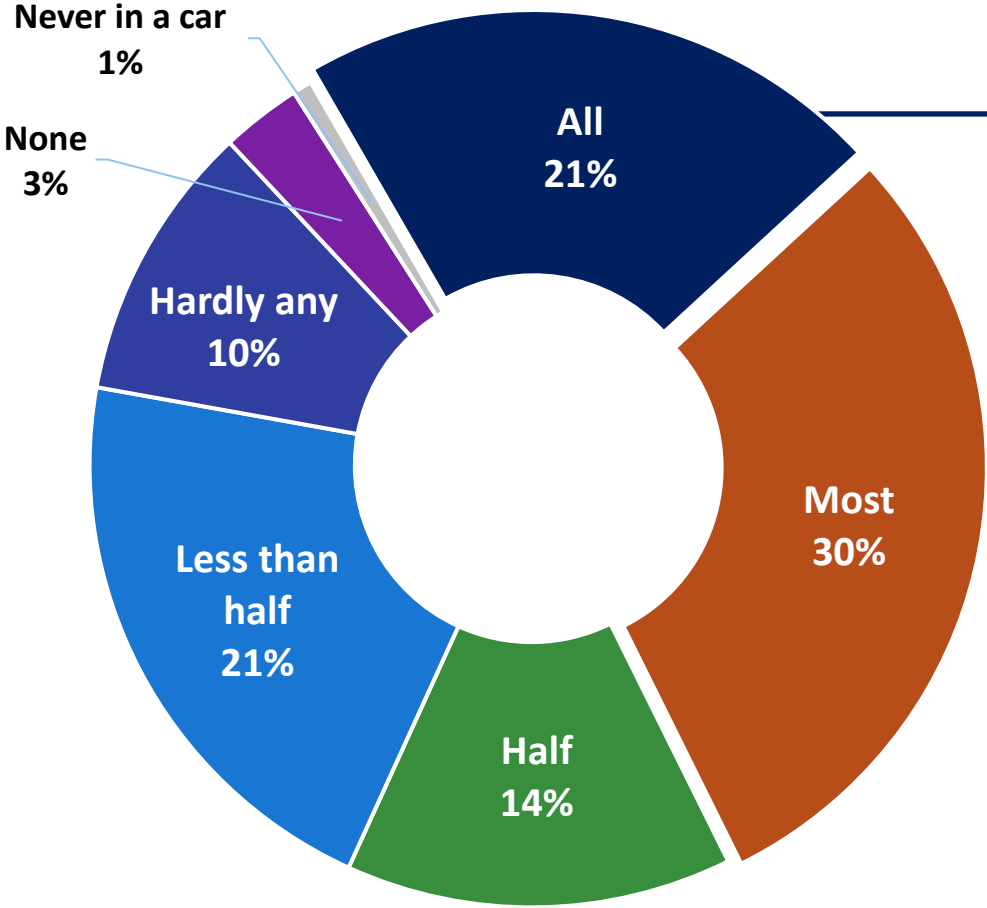


Most AM/FM radio listening by young people takes place in the car.

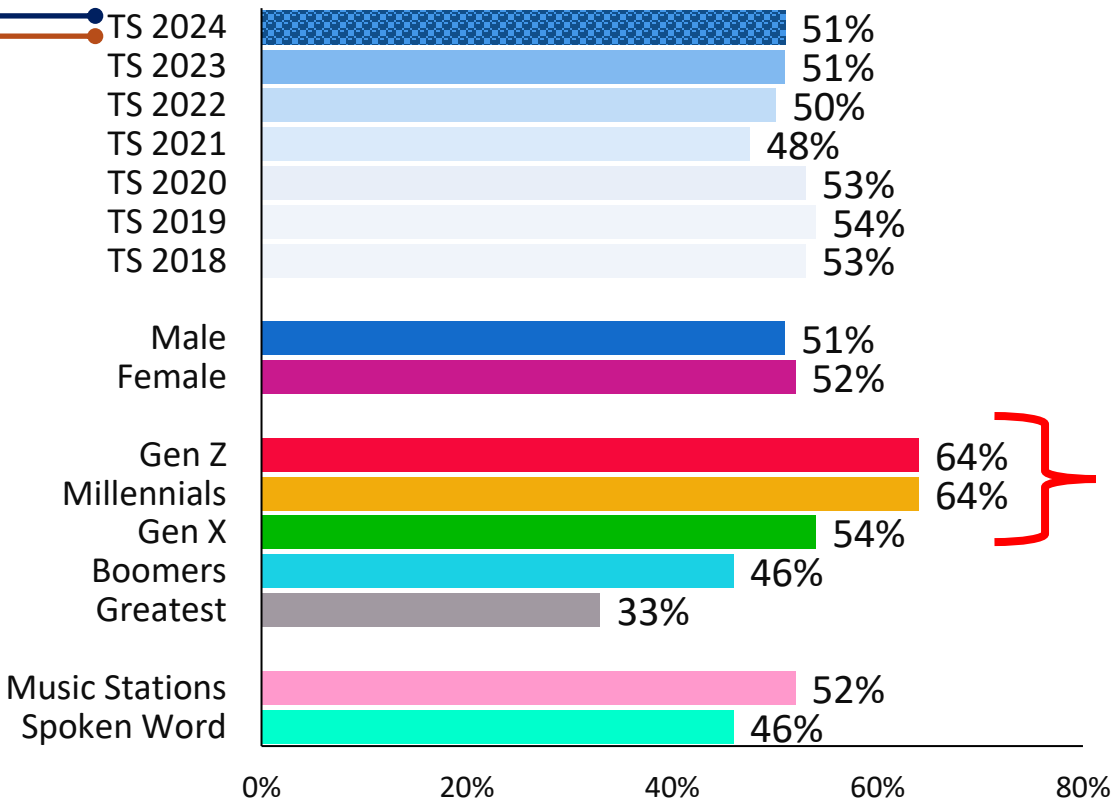


The car dashboard continues to evolve, giving drivers and passengers new options.

Millennials and Gen Z Are Most Likely to Be Exposed to Radio Only or Mostly When in a Vehicle

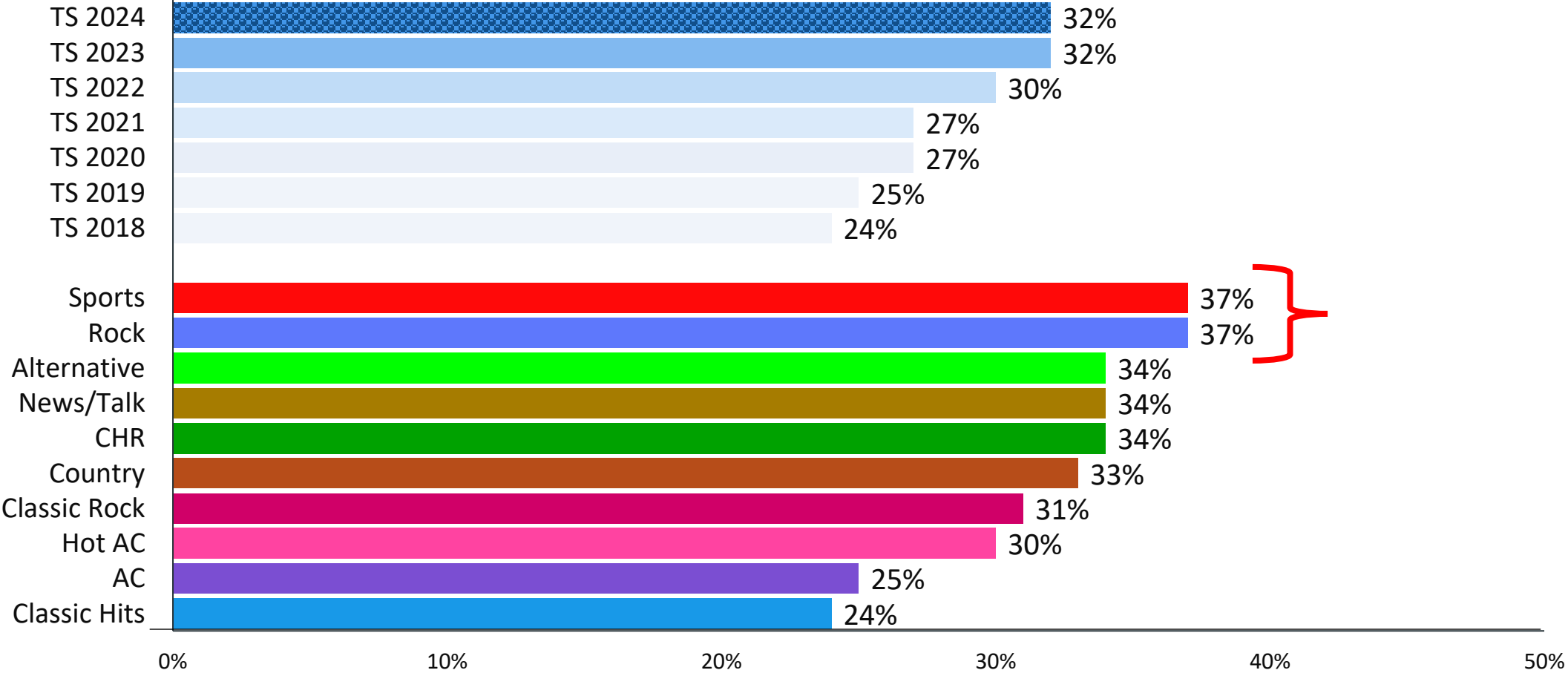


% Saying "All" or "Most" AM/FM Radio Listening Is In-Car

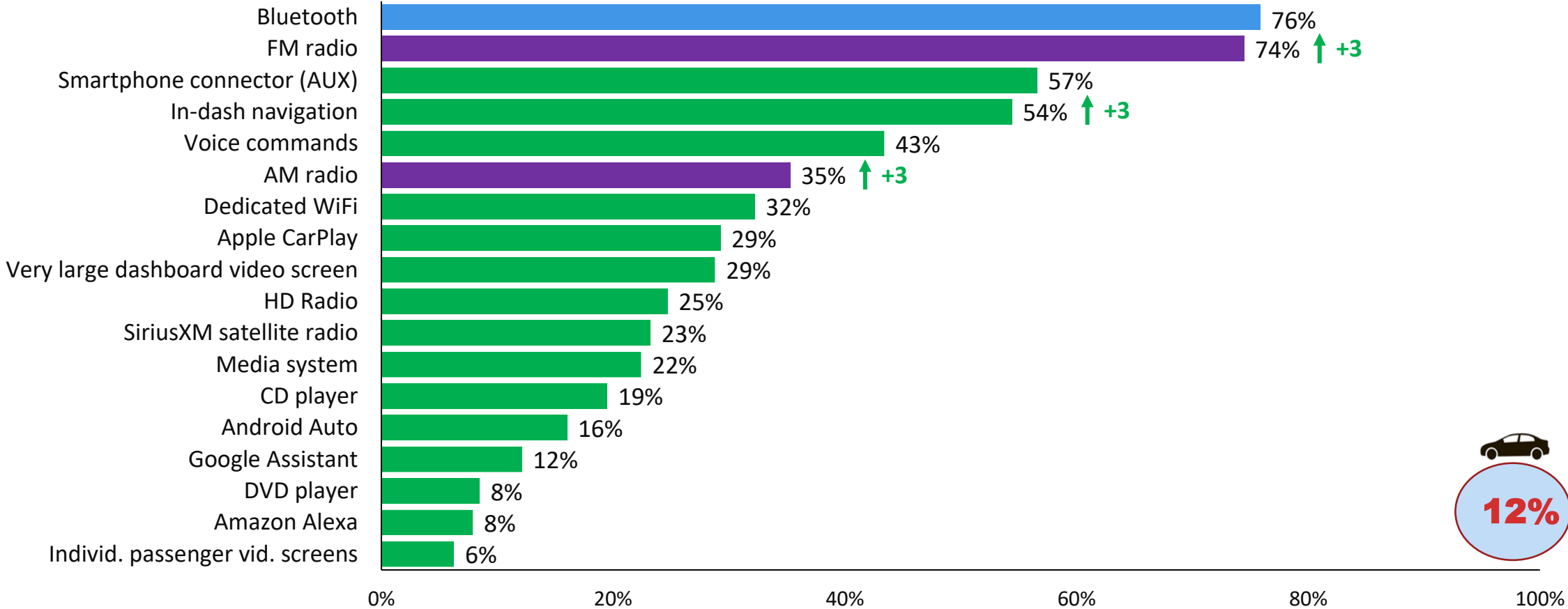


"During an average weekday, about how much of your total AM/FM radio listening time takes place in a car?"

About One in Three Owns an In-Car Media System, Led by Sports and Rock Fans



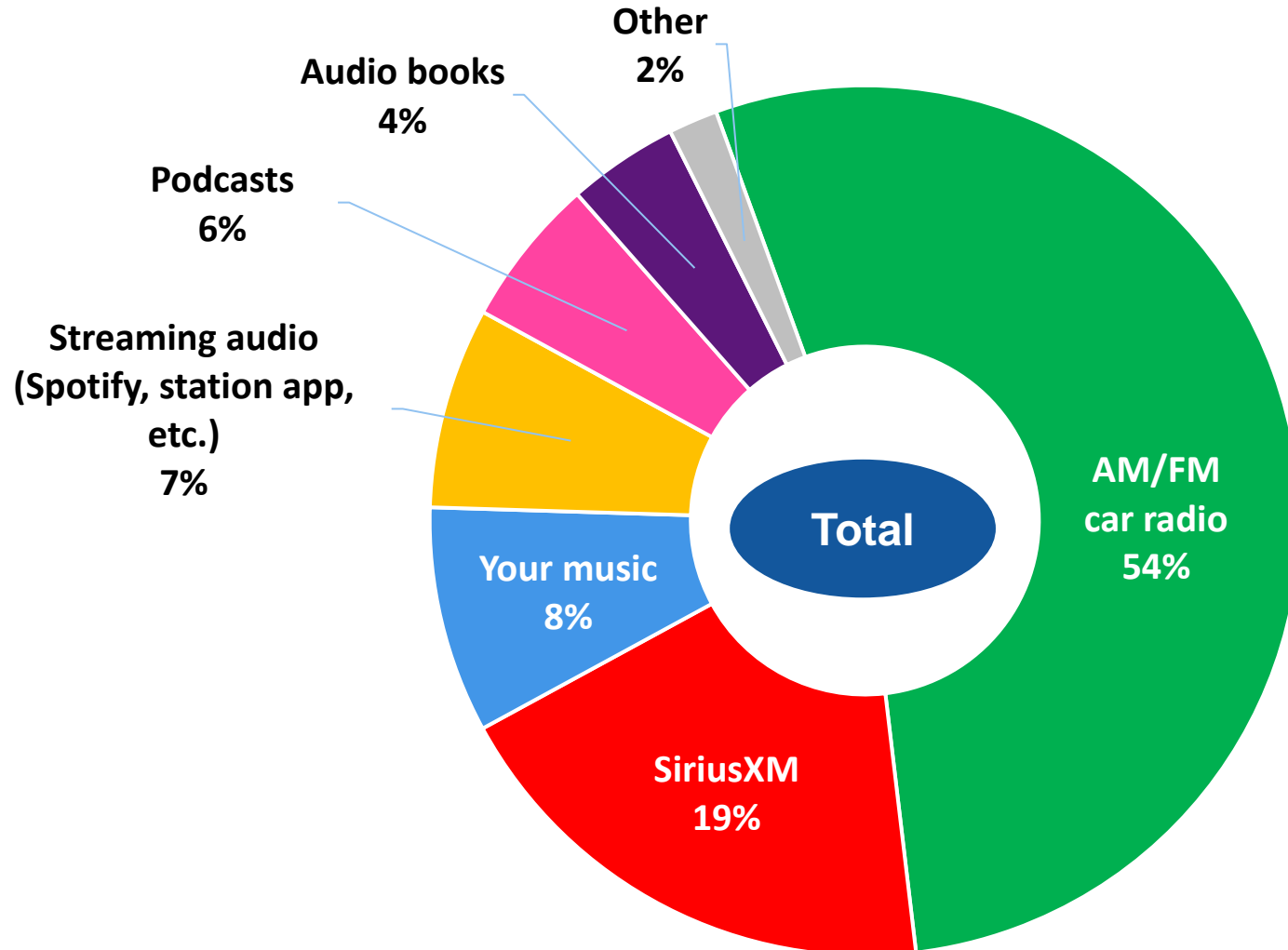
Bluetooth Holds a Slim Lead Over FM as Most Important New Car Feature, but AM and FM Are on the Upswing



“Very Important” features among those planning on buying/leasing (or already bought) a new vehicle in 2024

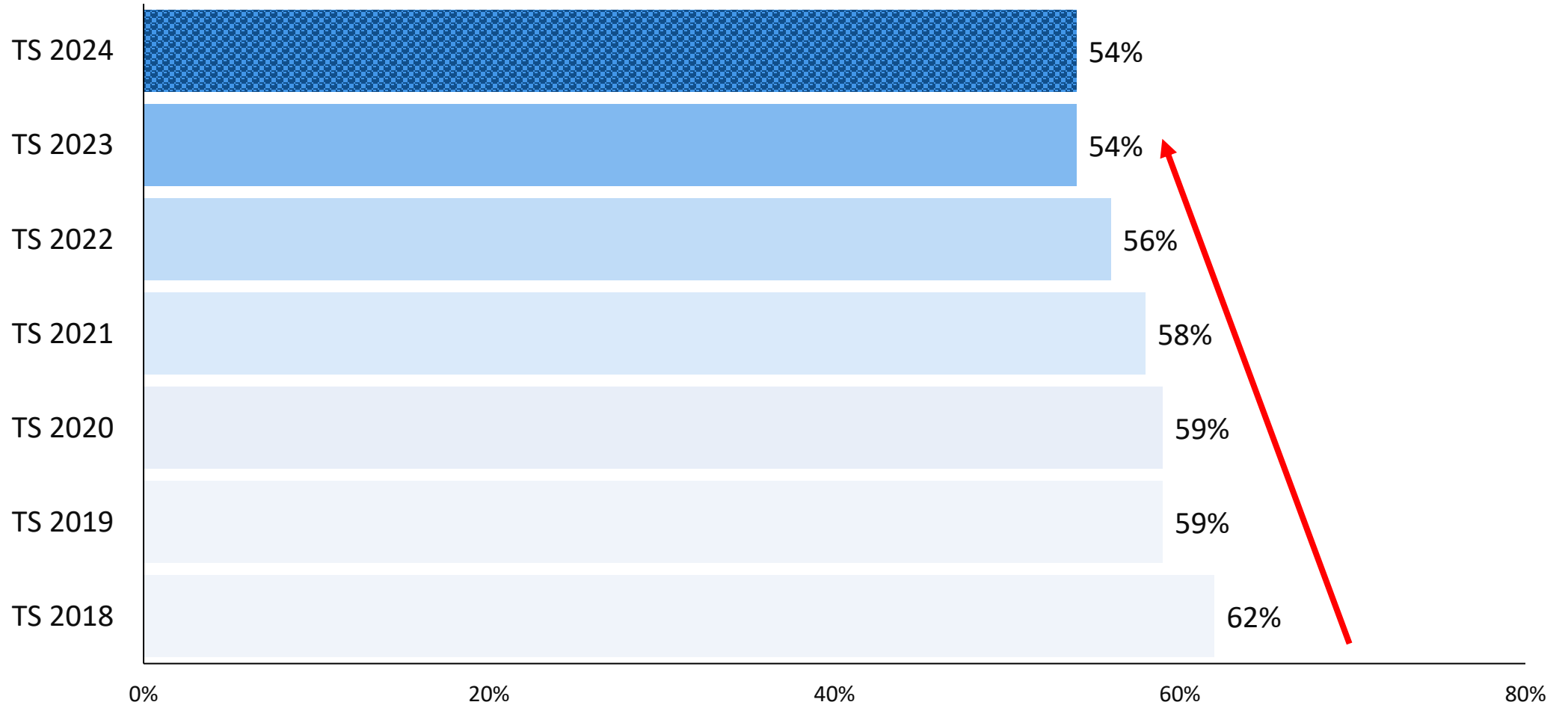


AM/FM Car Radio Still Makes Up the Majority of In-Car Audio Usage

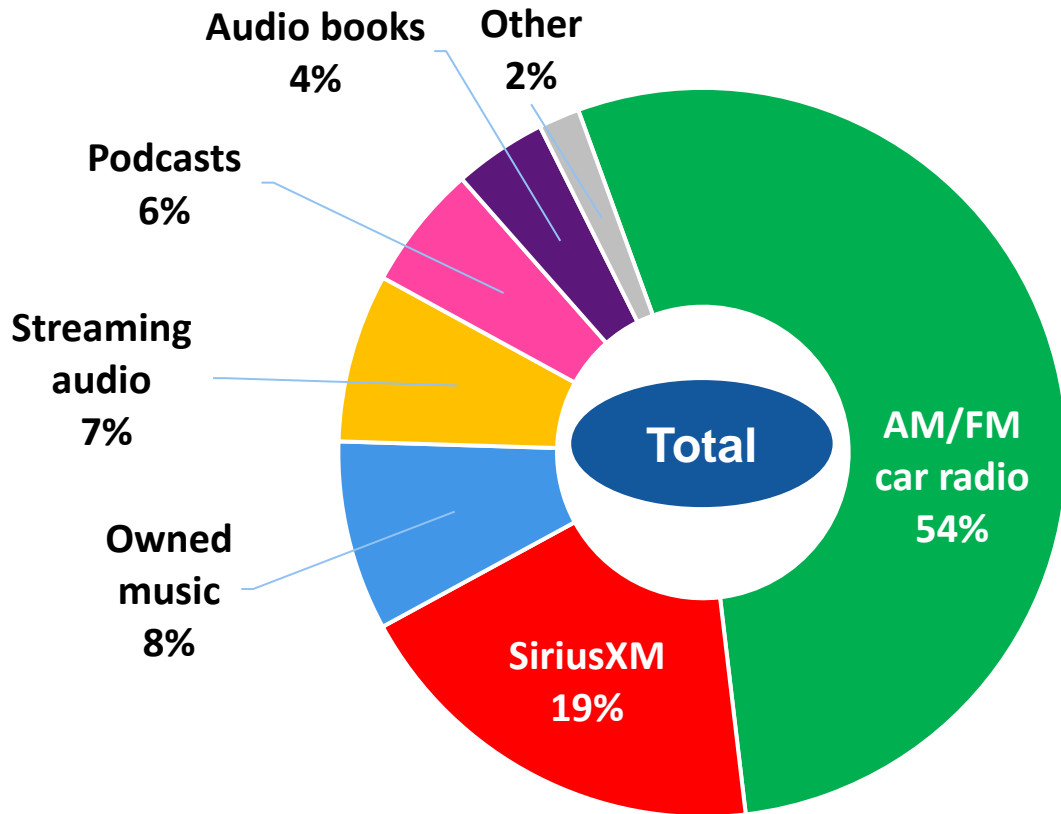


AM/FM Car Radio – 54%
Other Audio – 44%

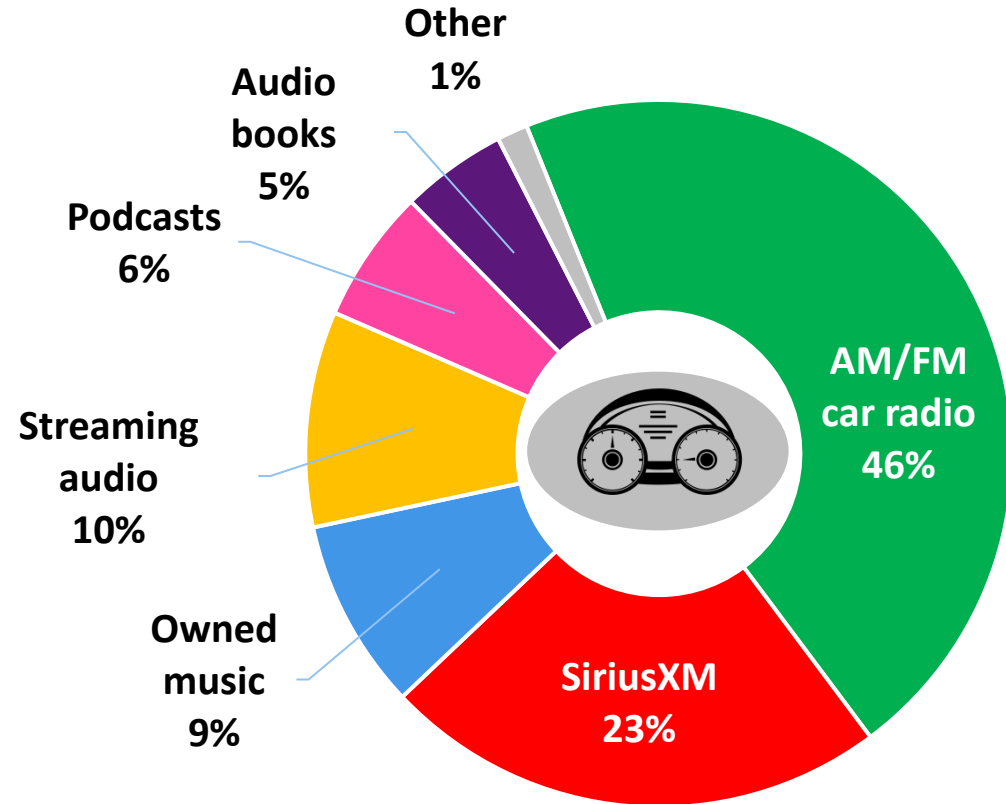
AM/FM Radio Listening in the Car Holds Steady After Years of Declines



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

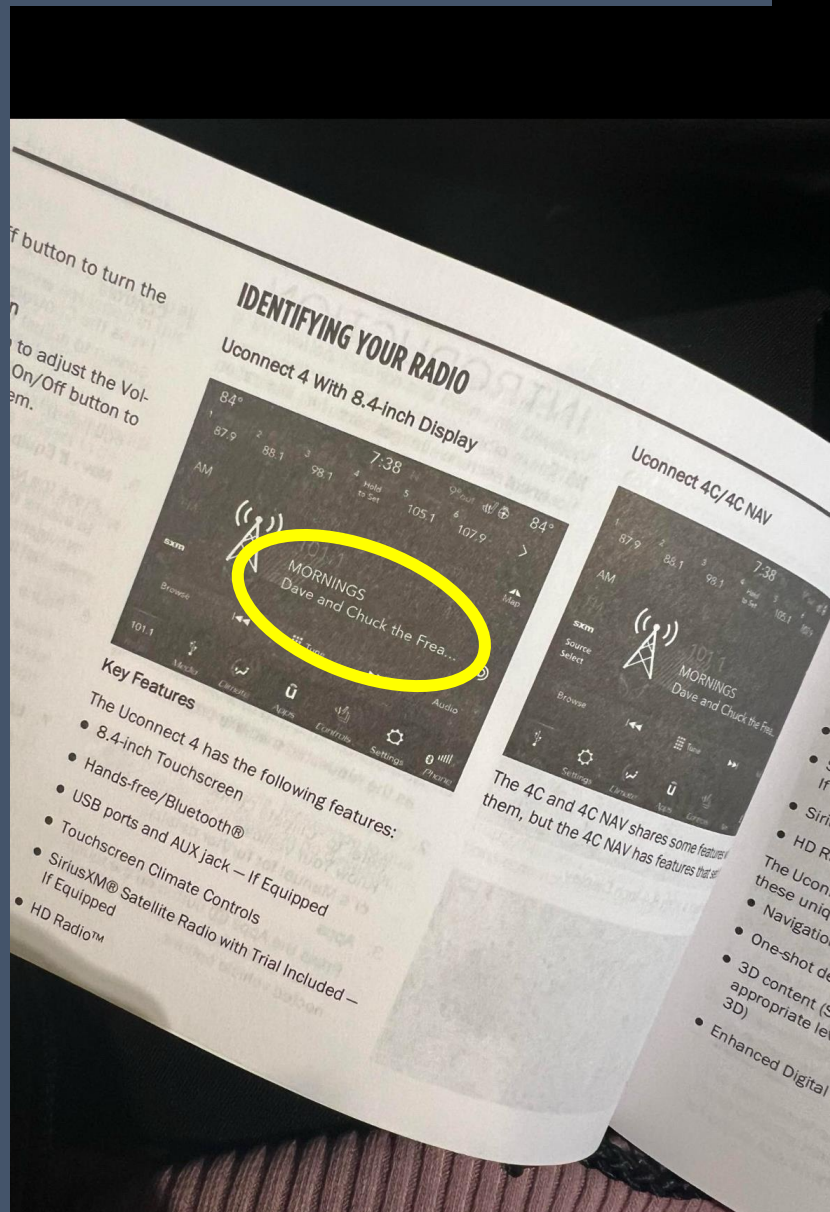


AM/FM Car Radio – 54%
Other Audio – 44%



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

When you use metadata to message your station and your shows, *anything* can happen.

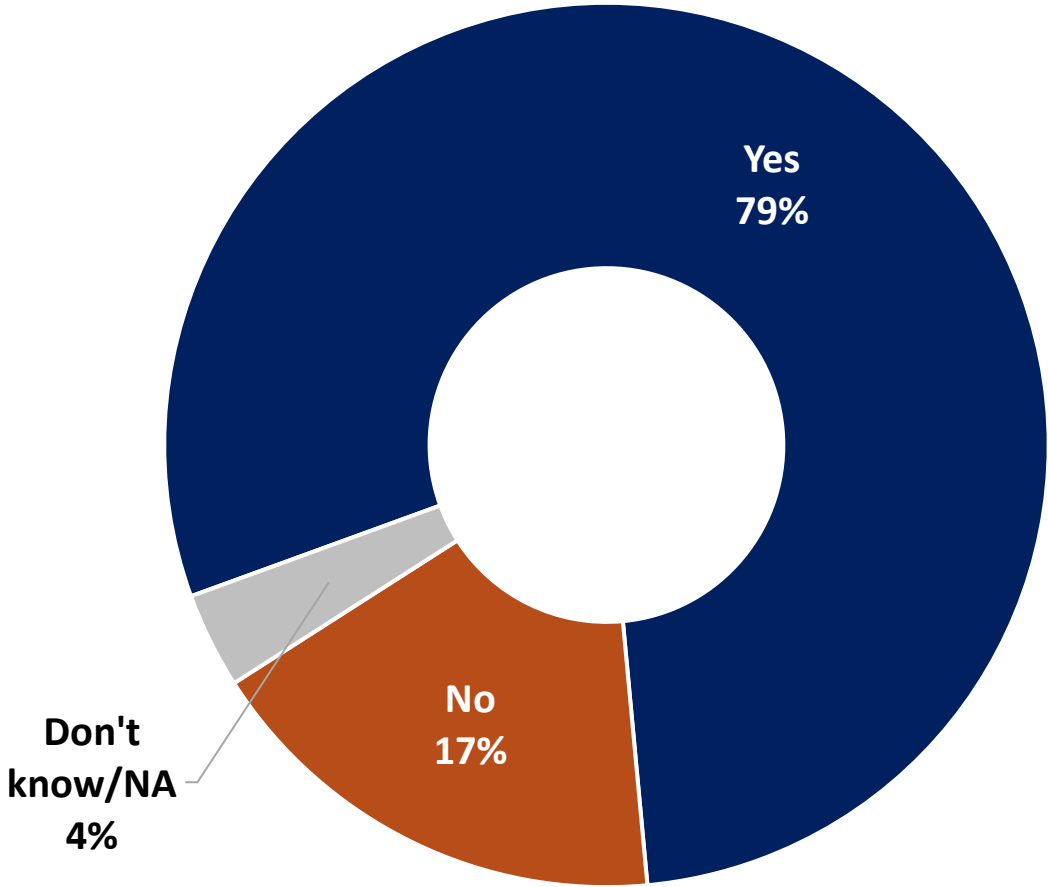




Most vehicles on the road can display artist/title info. Drivers like real-time information about weather, traffic, and news.

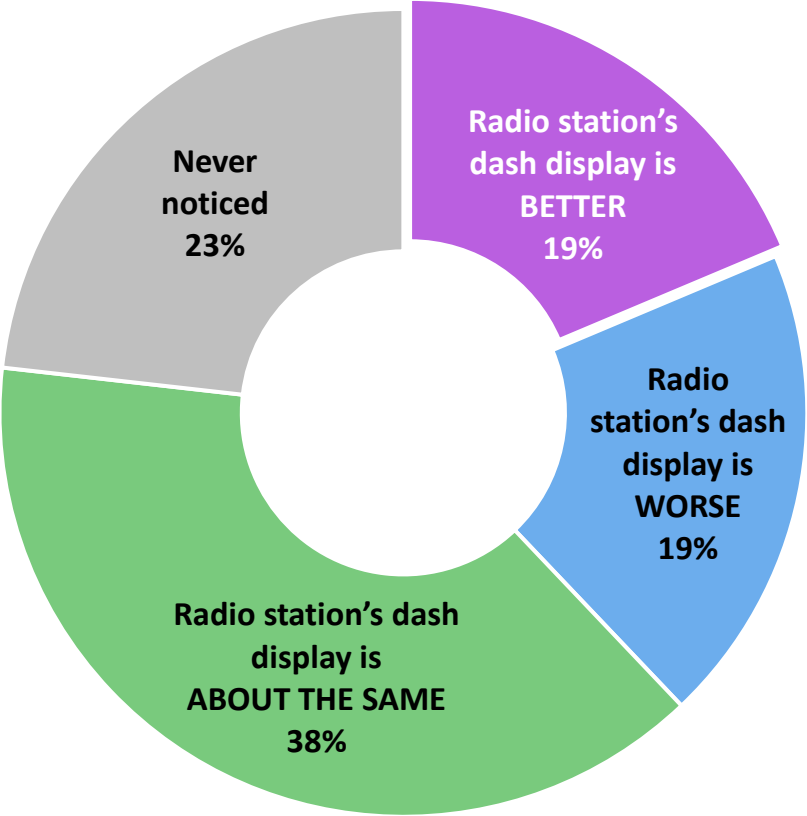
Metadata Matters: About Four in Five Own Vehicles That Display Artist and Title Information

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



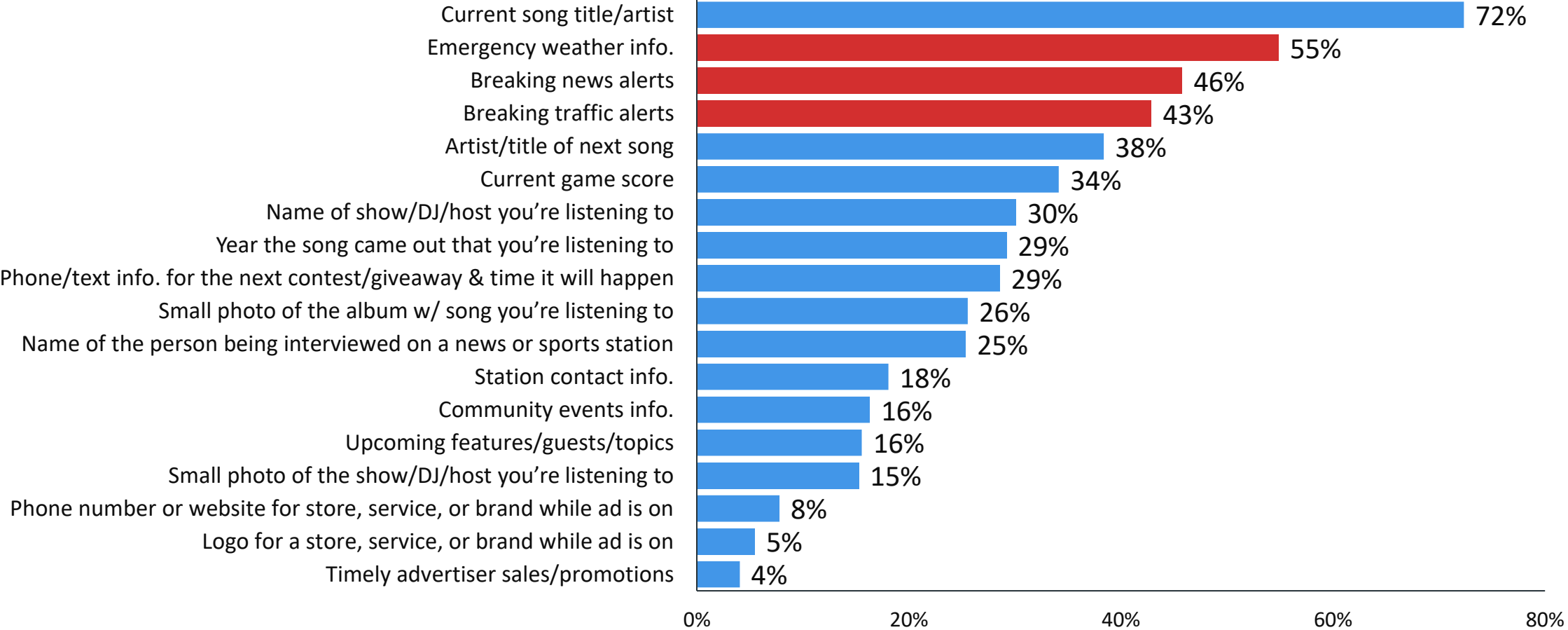
Radio Station Dashboard Displays Are Generally Seen as Comparable to Displays From Other Types of Audio

“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

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

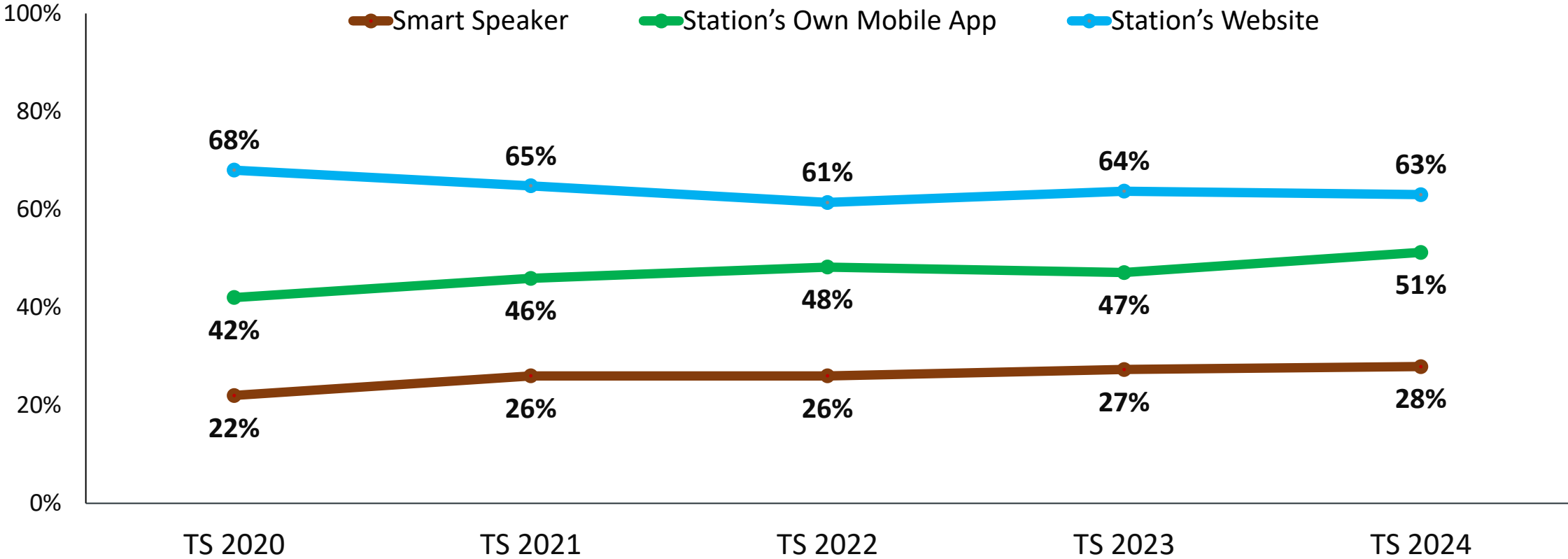


Among those with car dashboard having the ability to display artist/title info., % "very interested" in each element



**Mobile
continues to
play a key
role in
streaming
audio usage.**

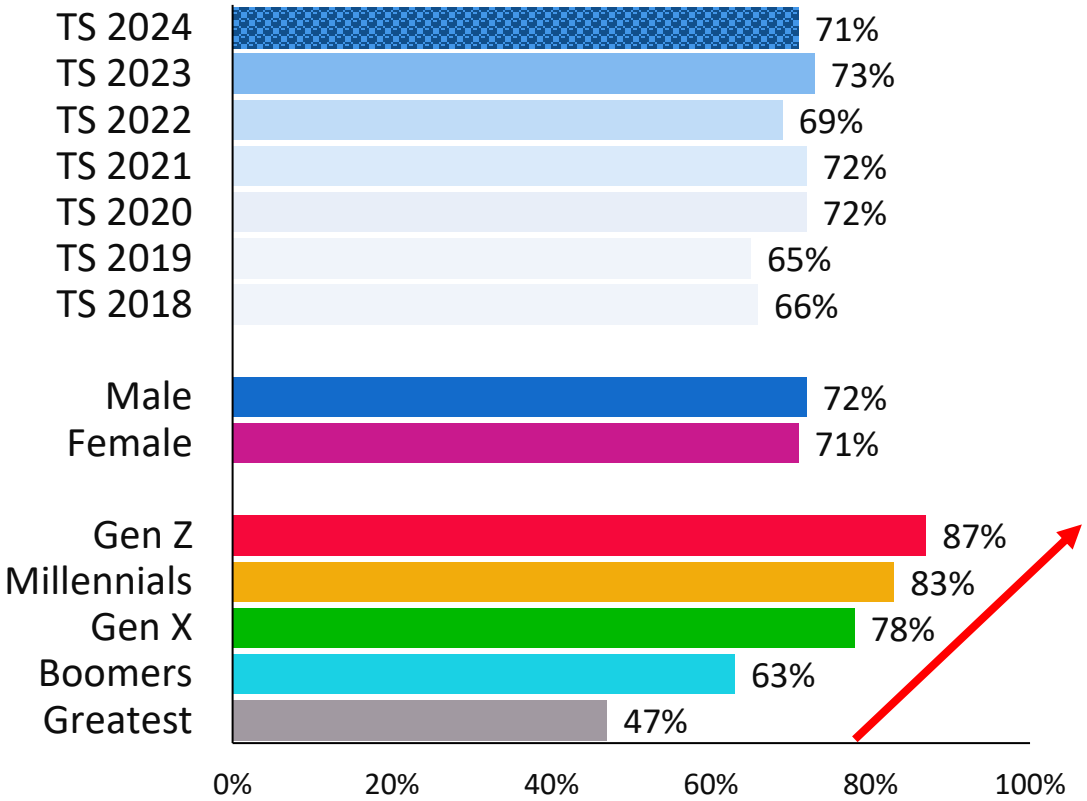
Mobile Apps Continue Their Solid #2 Position Behind Websites For Streaming the P1 Station



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)

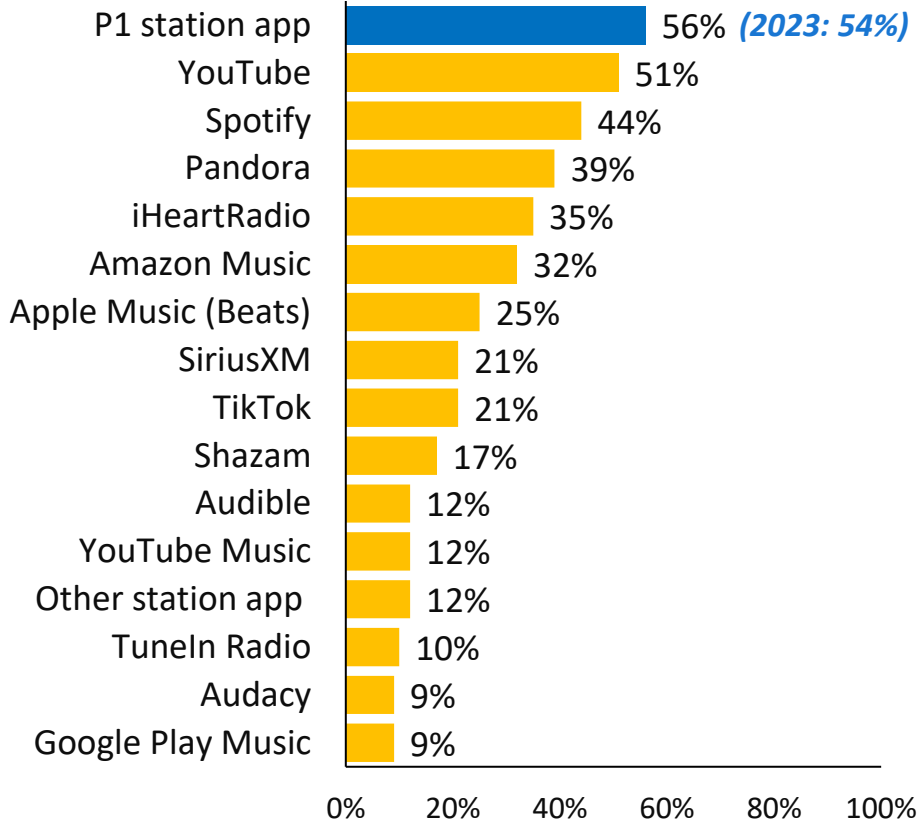
Seven in Ten Have Now Downloaded Radio/Music Apps; P1 Station App Downloads Are in the Lead

% Who Have Downloaded a Radio/Music App



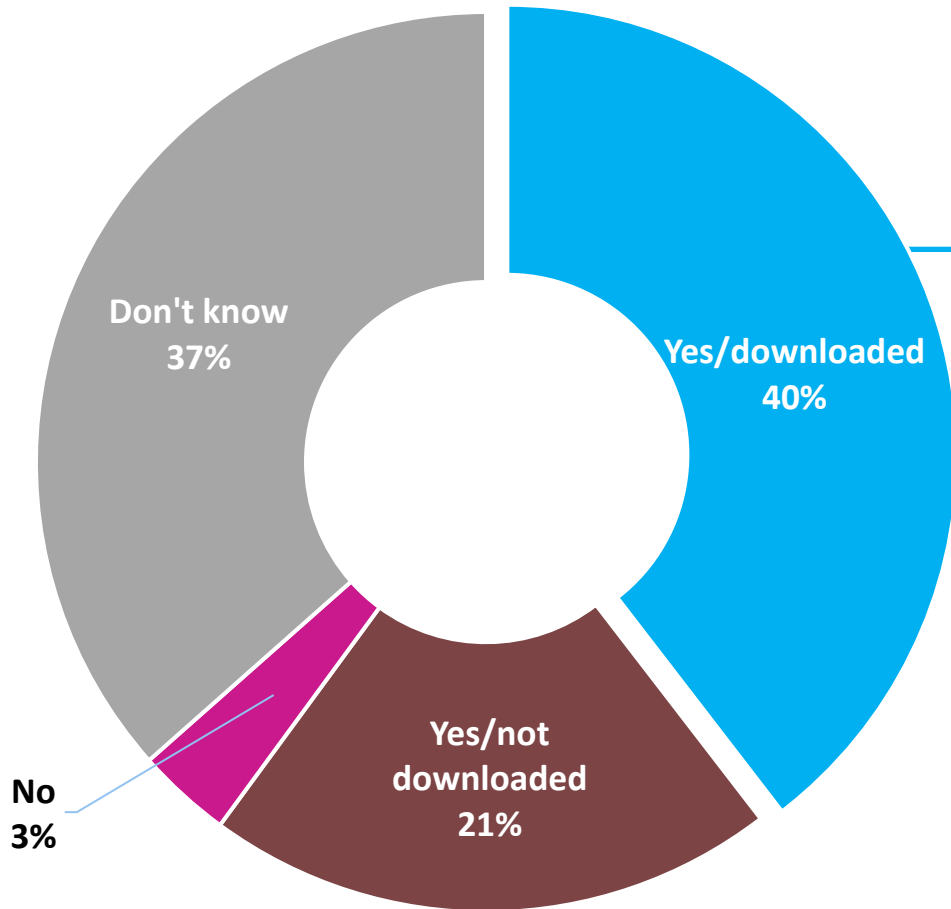
Among smartphone and/or tablet owners

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

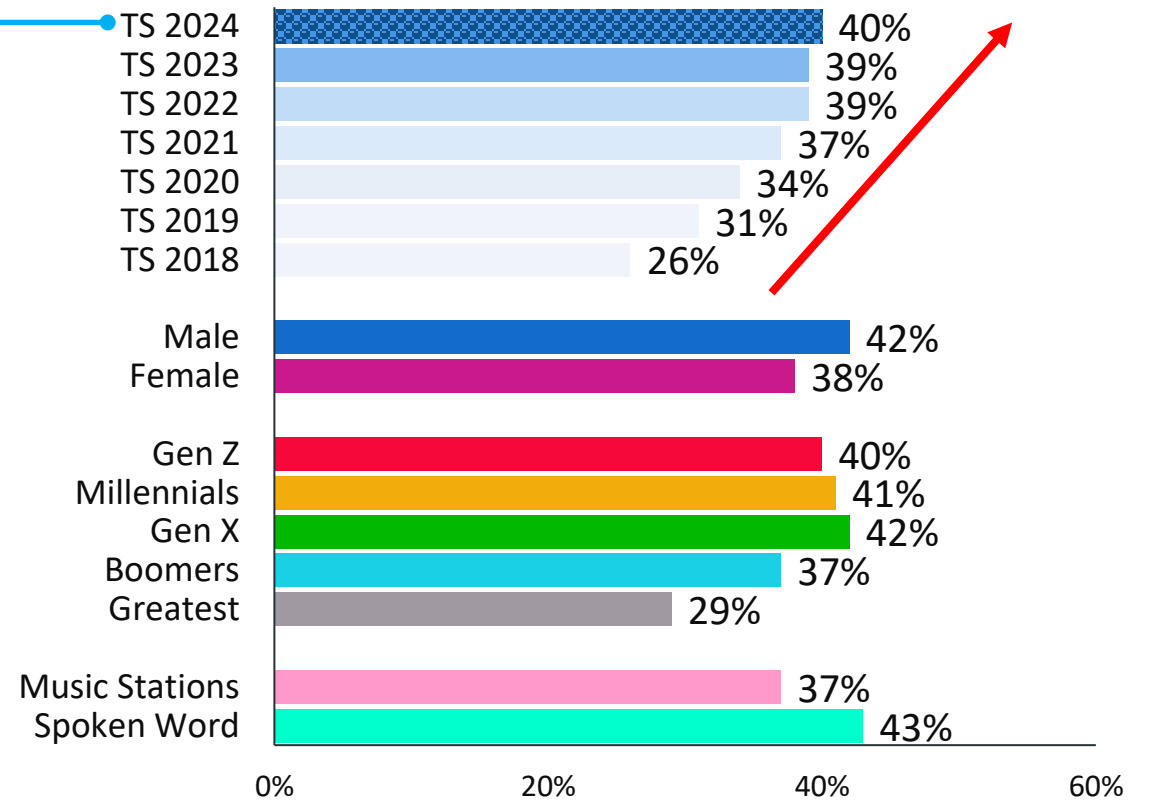


Among those who have downloaded a radio/music app (apps 7% and higher shown)

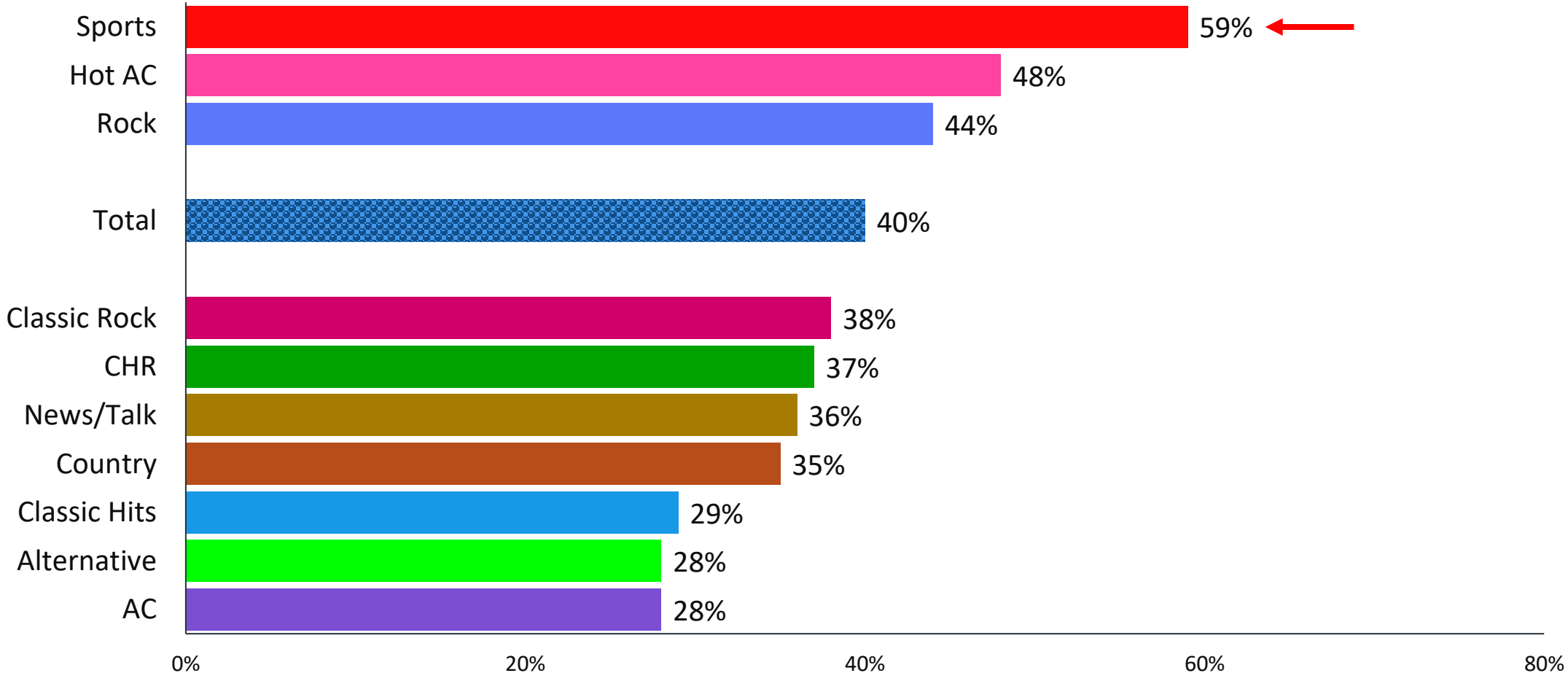
Four in Ten Have Now Downloaded Their P1 Station's App



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

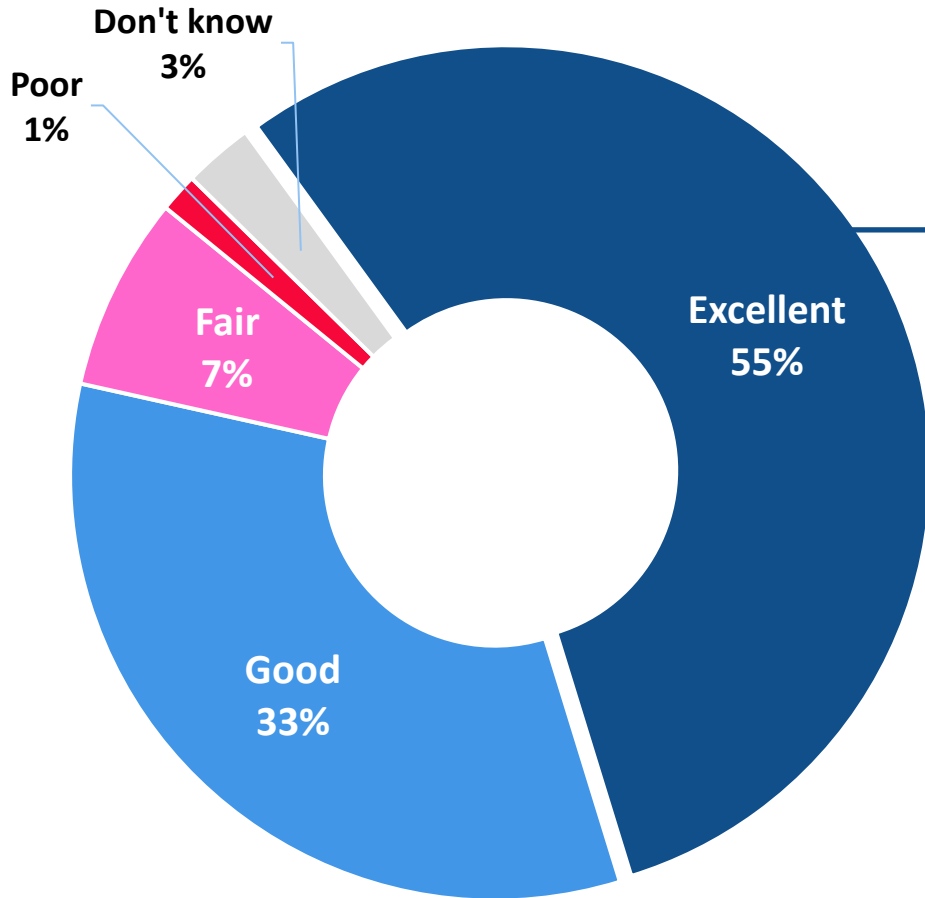


Sports Radio Fans Are Especially Likely to Have Downloaded Their P1 Station's App



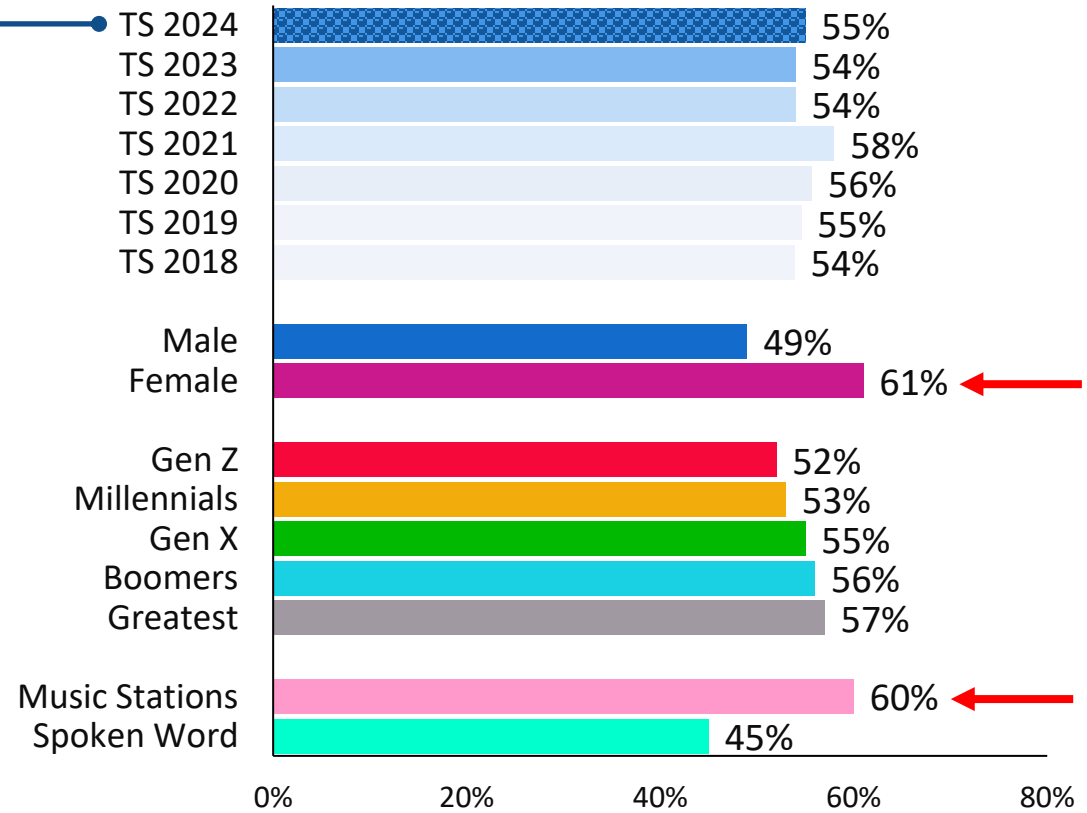
% by format, of smartphone/tablet owners who have downloaded P1 station app

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"



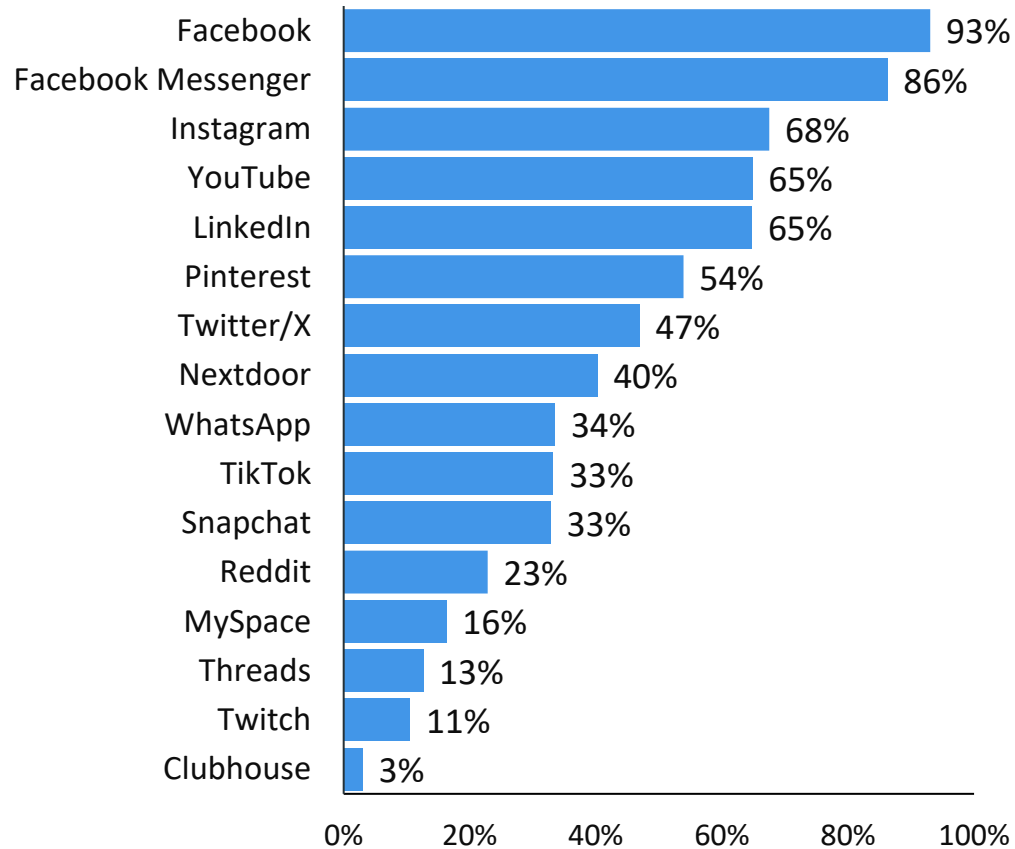
Among smartphone and/or tablet owners who have downloaded their P1 station's app



**The social media hierarchy is mostly steady, but
Twitter/X is experiencing turbulence.**

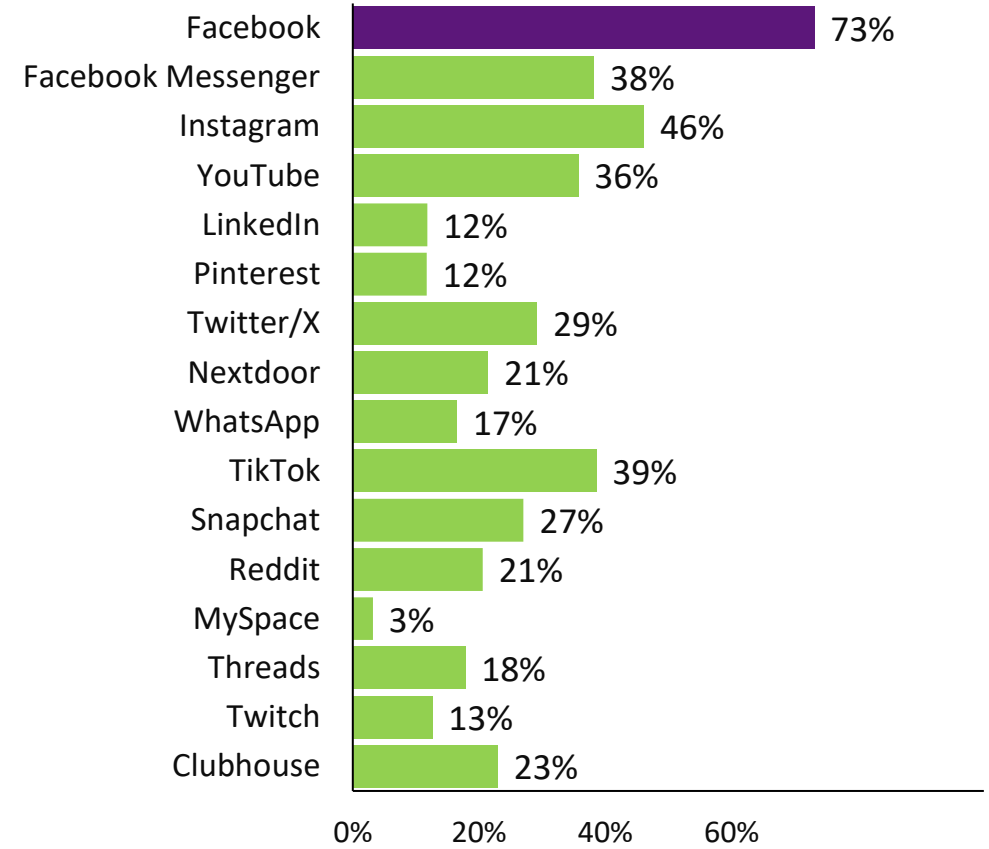
Facebook Retains its Typical Leader Position for “Cume”* And “TSS”+ Among Those in the Social Space

% Who Have a Profile on (Platform)



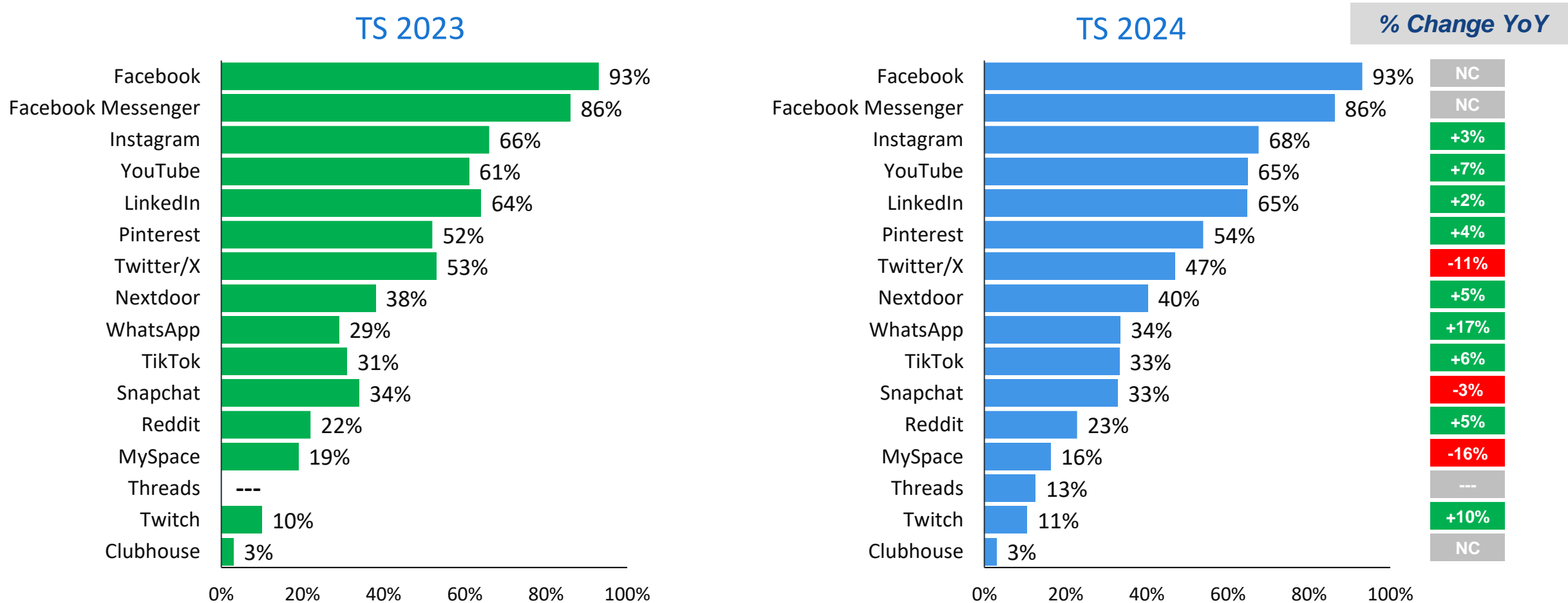
Among those with any social media profile

% Who Use (Platform) Daily



Among those with a profile on (platform)

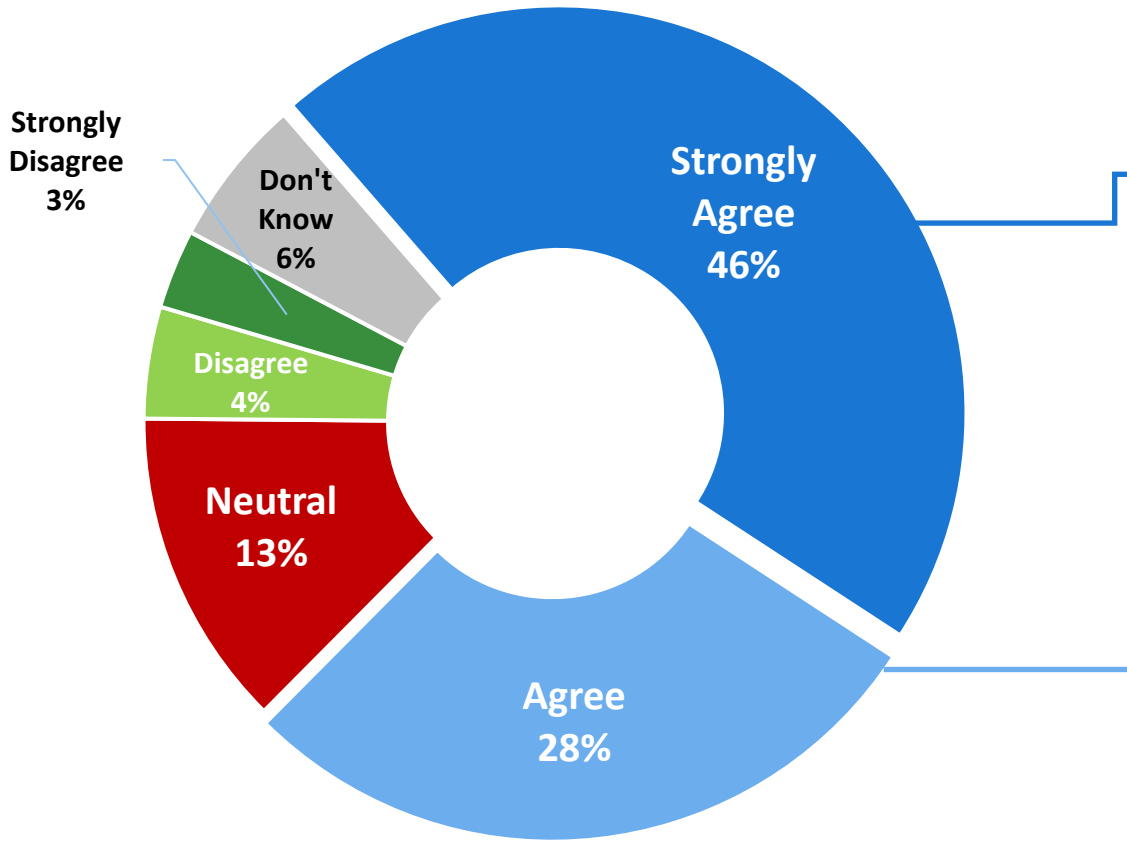
Facebook and Messenger Are the Social Leaders, While Twitter/X Has Shed More Than 10% Of Its Users



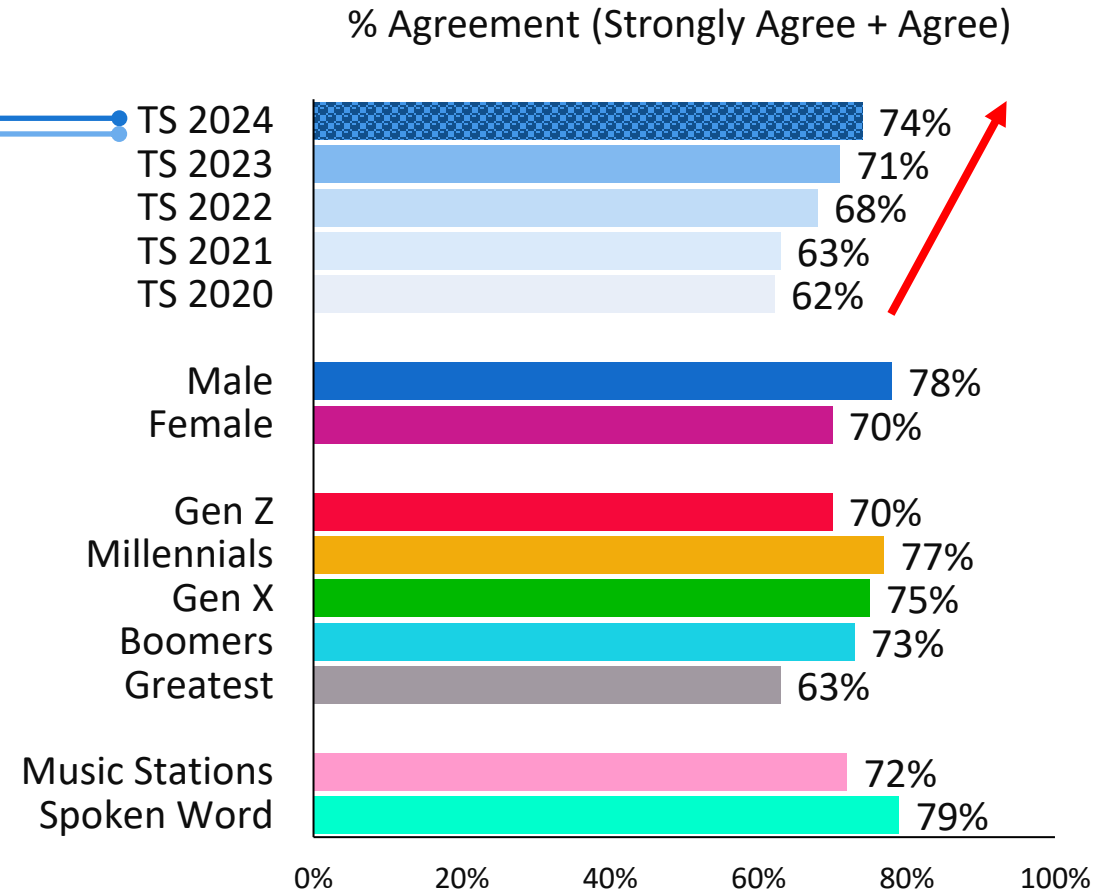


There is growing concern about the cost of content subscription fees.

Three in Four Now Say Subscription Fees for Audio/Video Content Are a Growing Concern

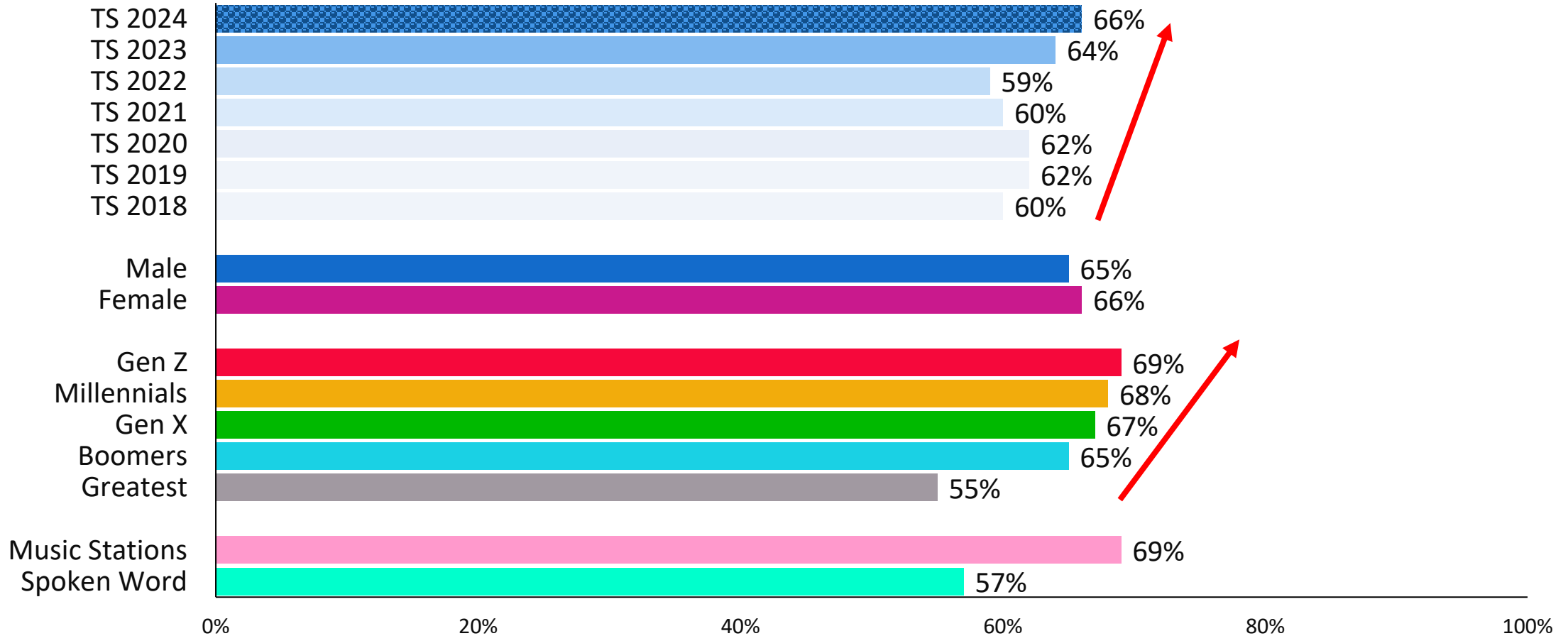


"I am concerned about the growing number of subscription fees I'm paying for media content"



A Growing Reason For Listening to AM/FM Radio Is It's Free – Especially Among Younger Listeners and Music Radio Fans

"It's Free"



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

Live Nation Had Another Record Year as Its Business Went Global & Fans Continued Flocking to Shows

The concert giant's top 50 tours had 50% more international acts in 2023 than five years ago.

By Glenn Peoples 

02/22/2024

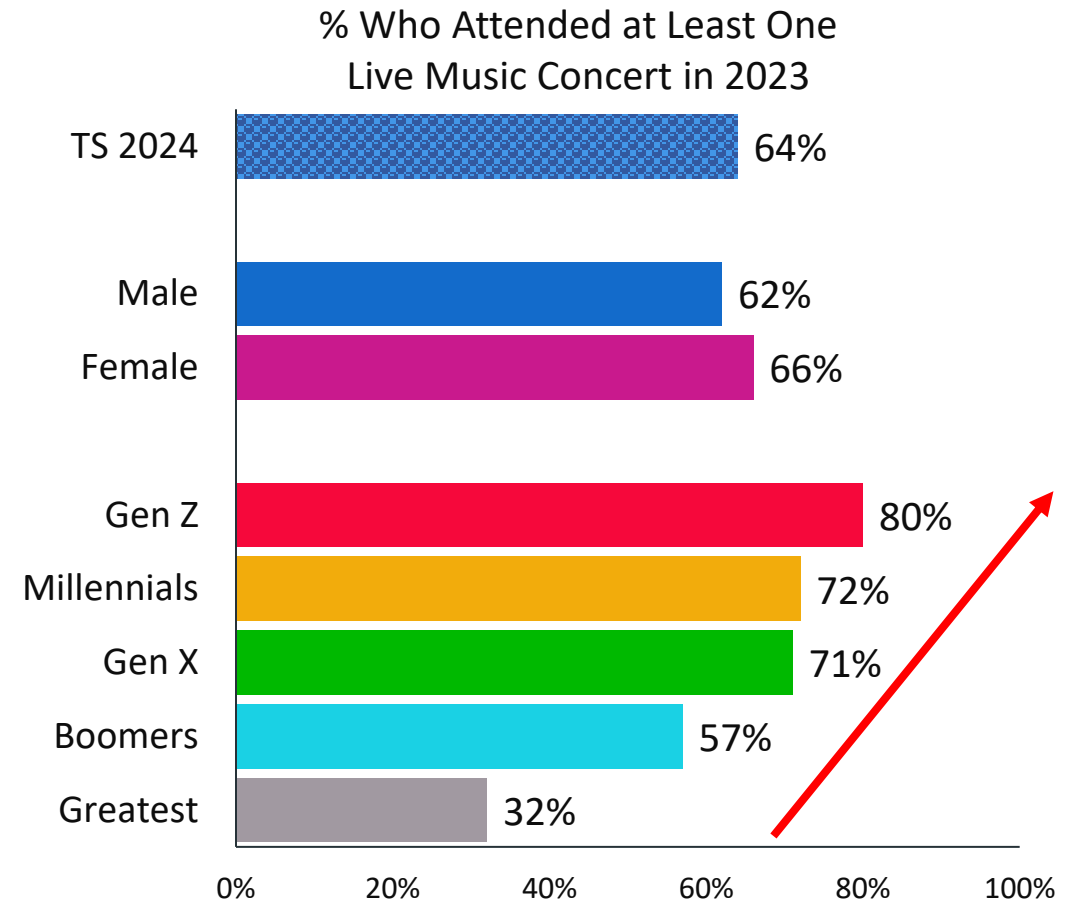
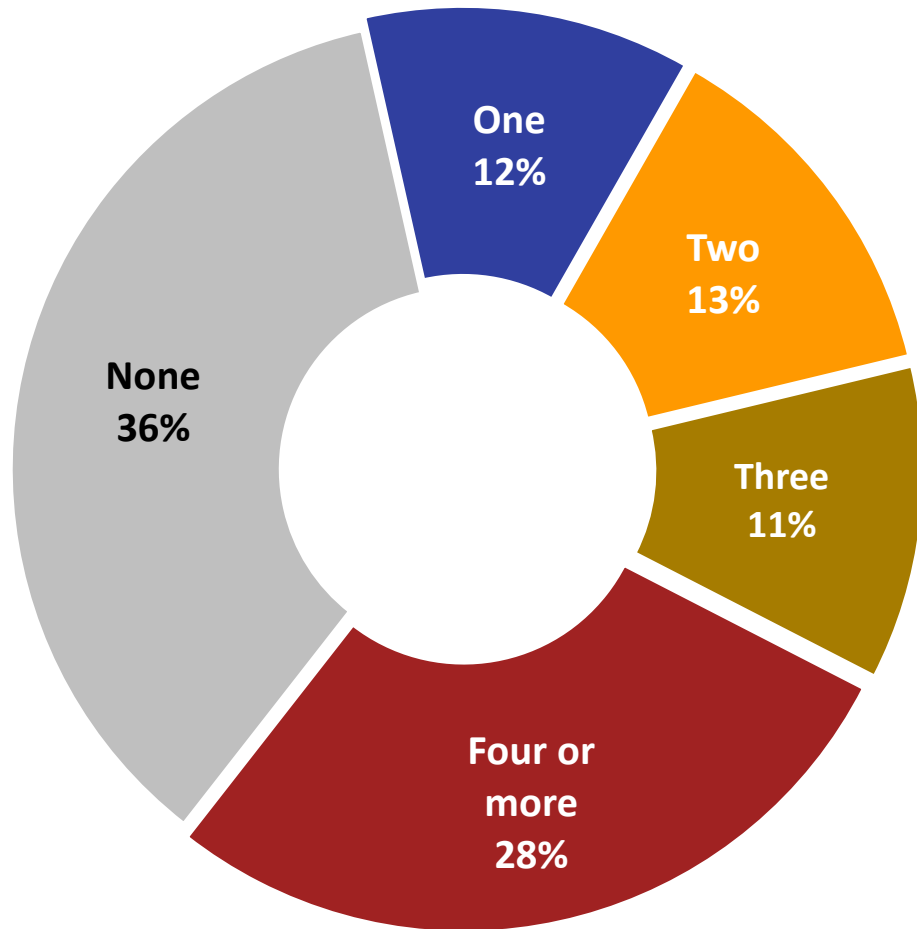


The Post-Pandemic Concert Scene



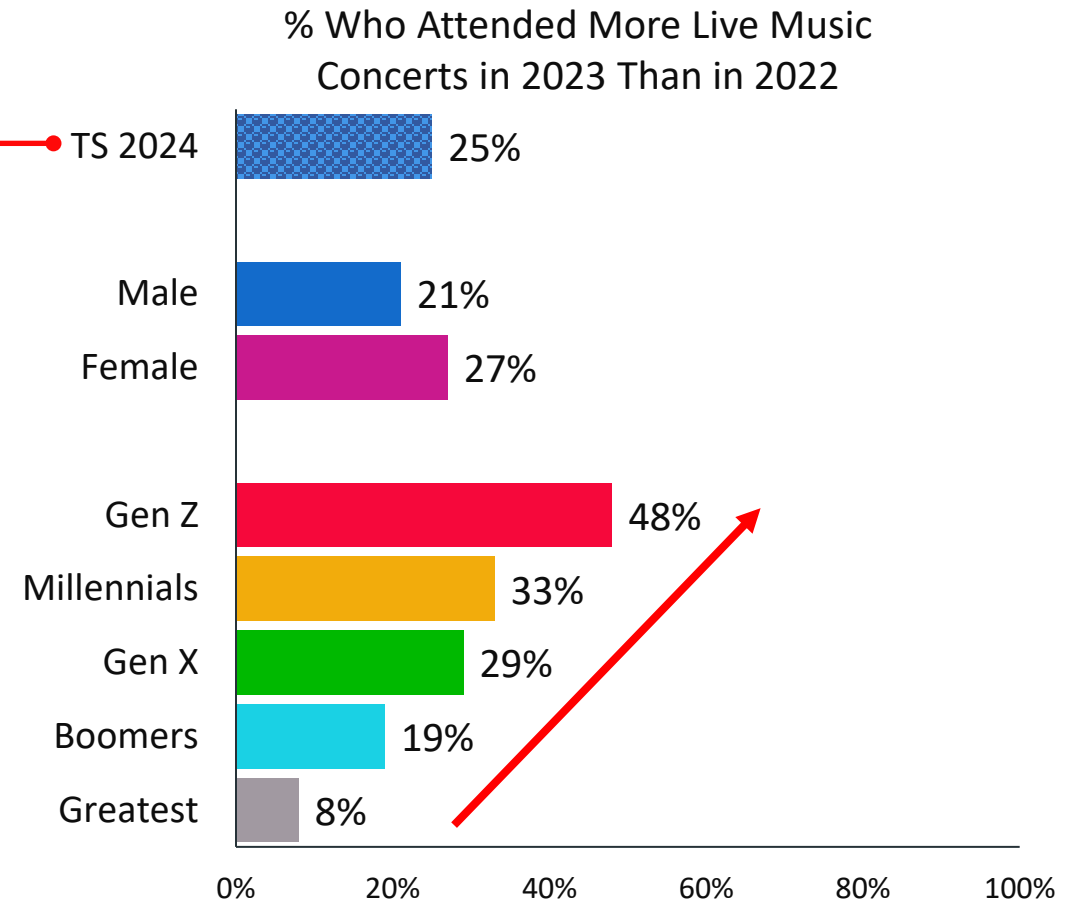
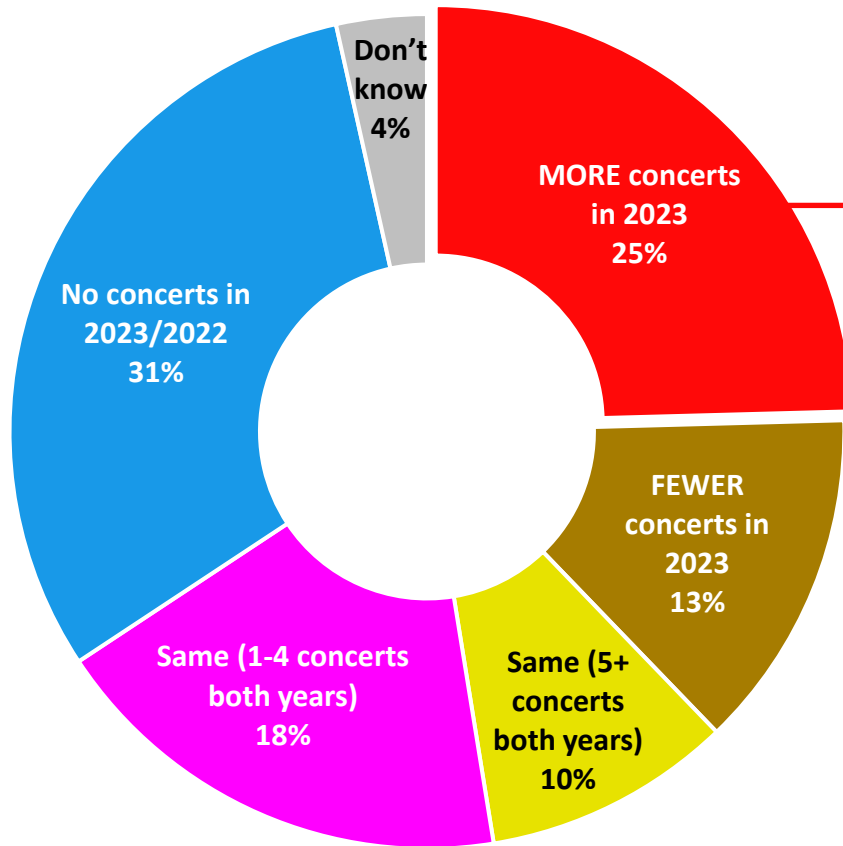
The Concert Scene: Attendance and Spending Habits Are Robust

Skewing Young, Nearly Two-Thirds Attended a Live Music Concert Last Year; More Than One-Fourth Went to Four or More Shows



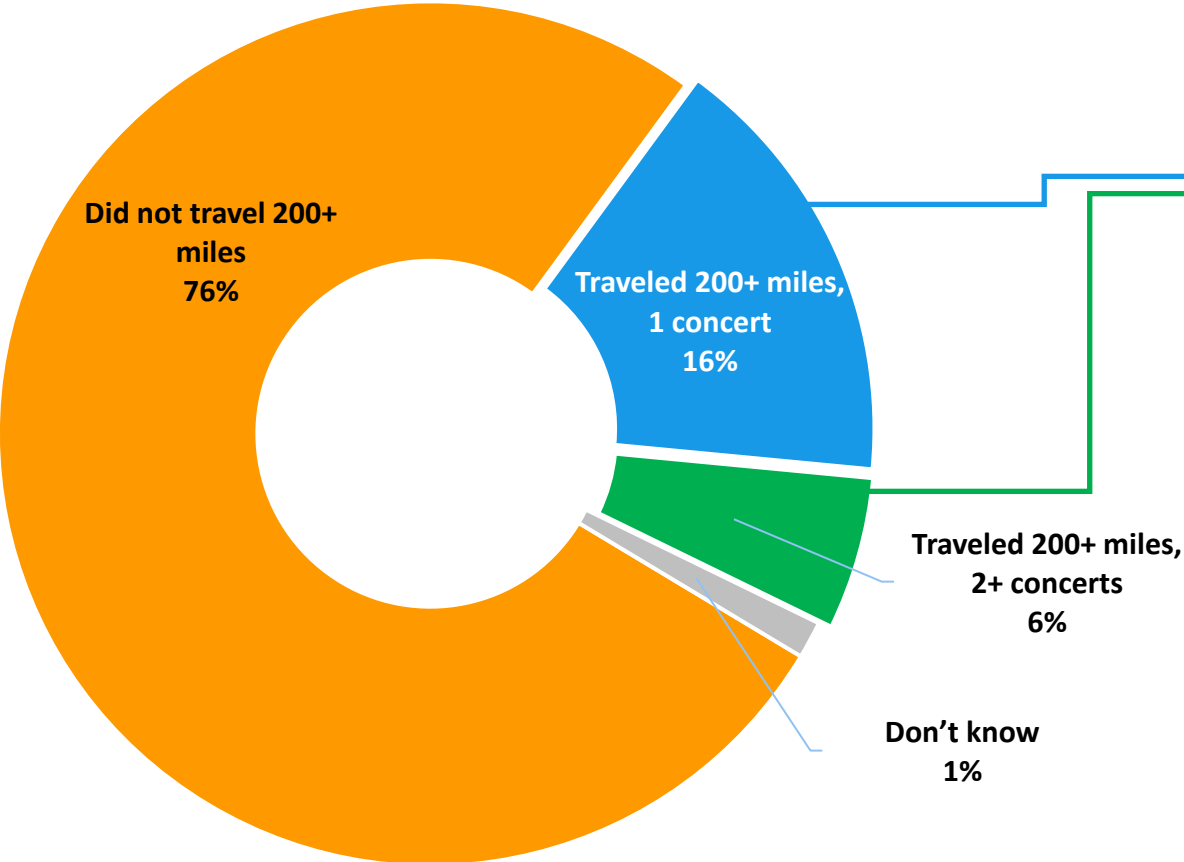
“How many live music concerts in venues like auditoriums, stadiums, arenas (not bars or clubs) did you personally attend in 2023?”

Leaning Young, One in Four Attended More Concerts in 2023

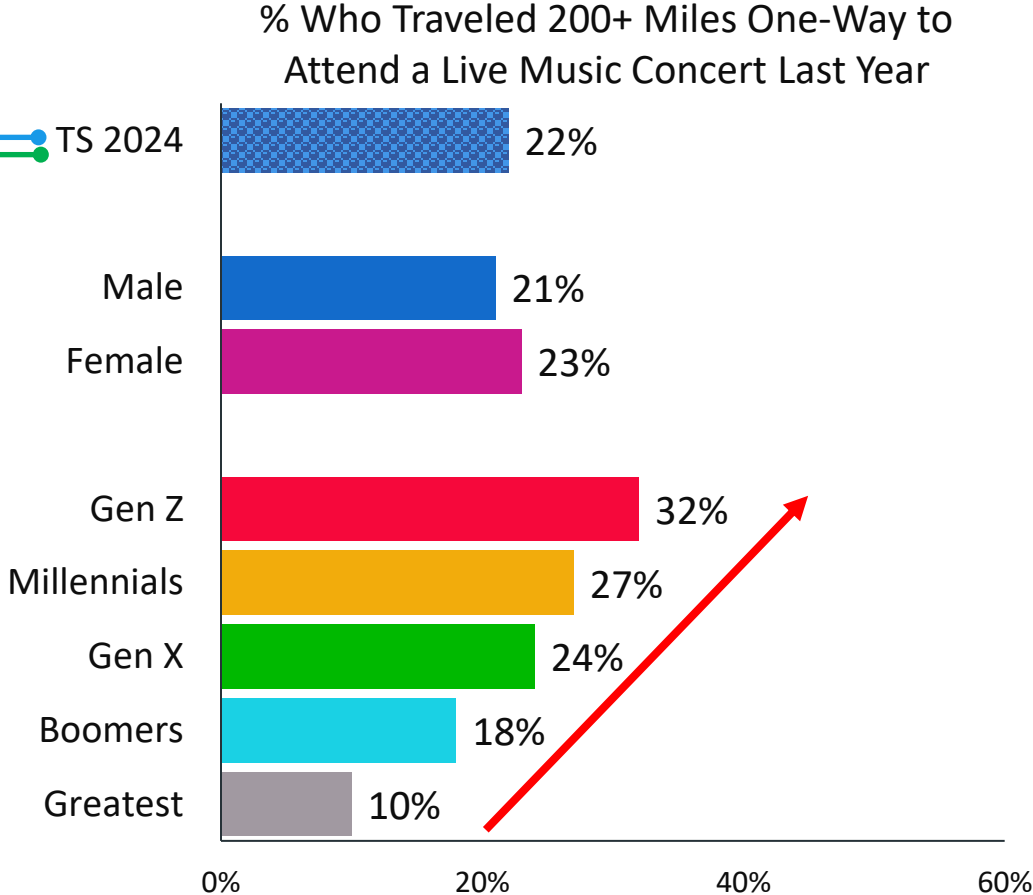


“Thinking about your live music concert attendance in venues like auditoriums, stadiums, arenas (not bars or clubs) how did the number of those concerts in 2023 compare to two years ago in 2022?”

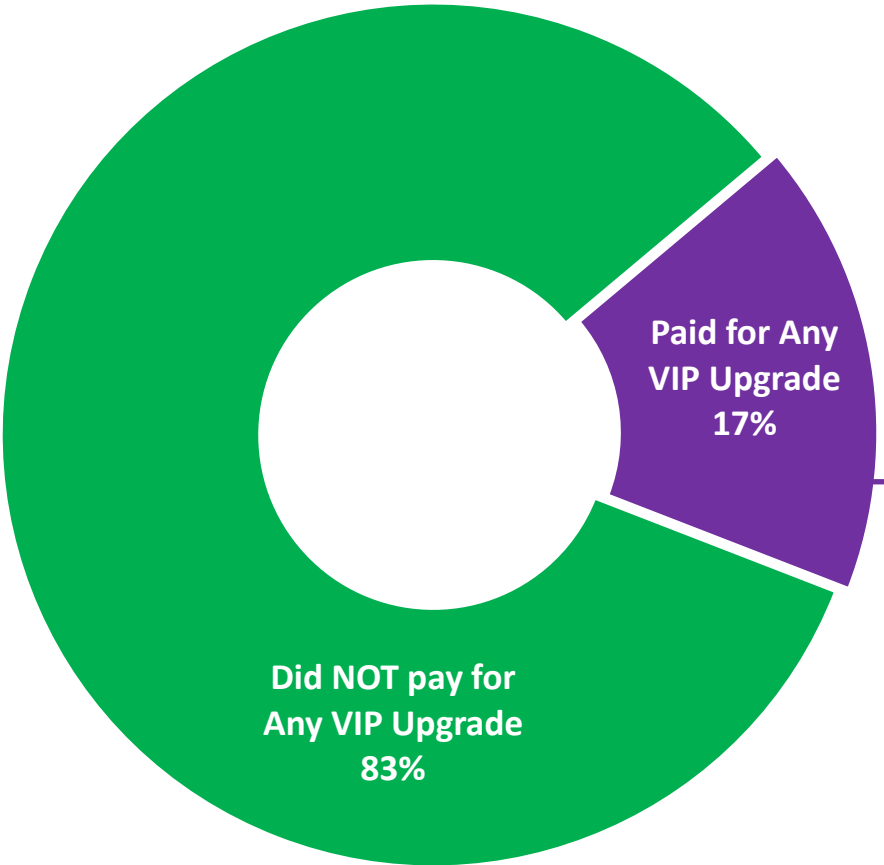
Nearly One in Four Concert-Goers Traveled Great Distances to Attend a Show in 2023 – Especially Younger Fans



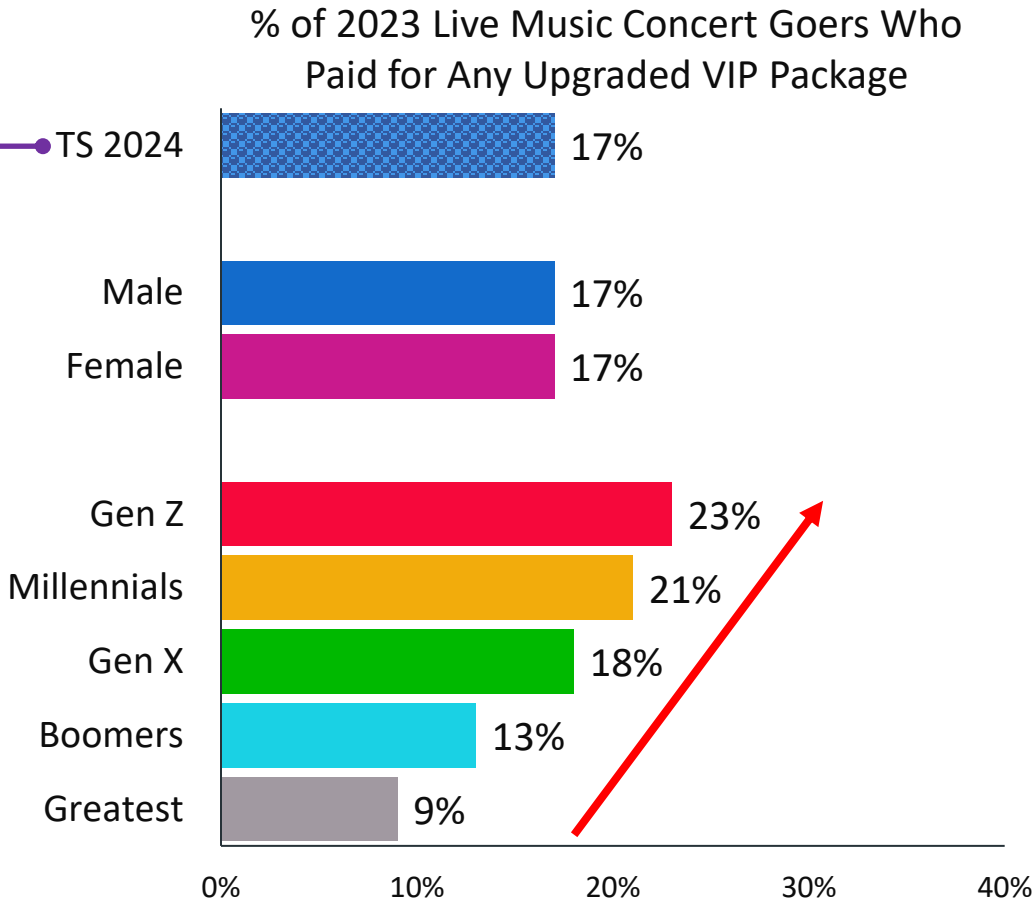
“Did you travel 200 miles or more (one-way) to attend any live music concert in 2023?”



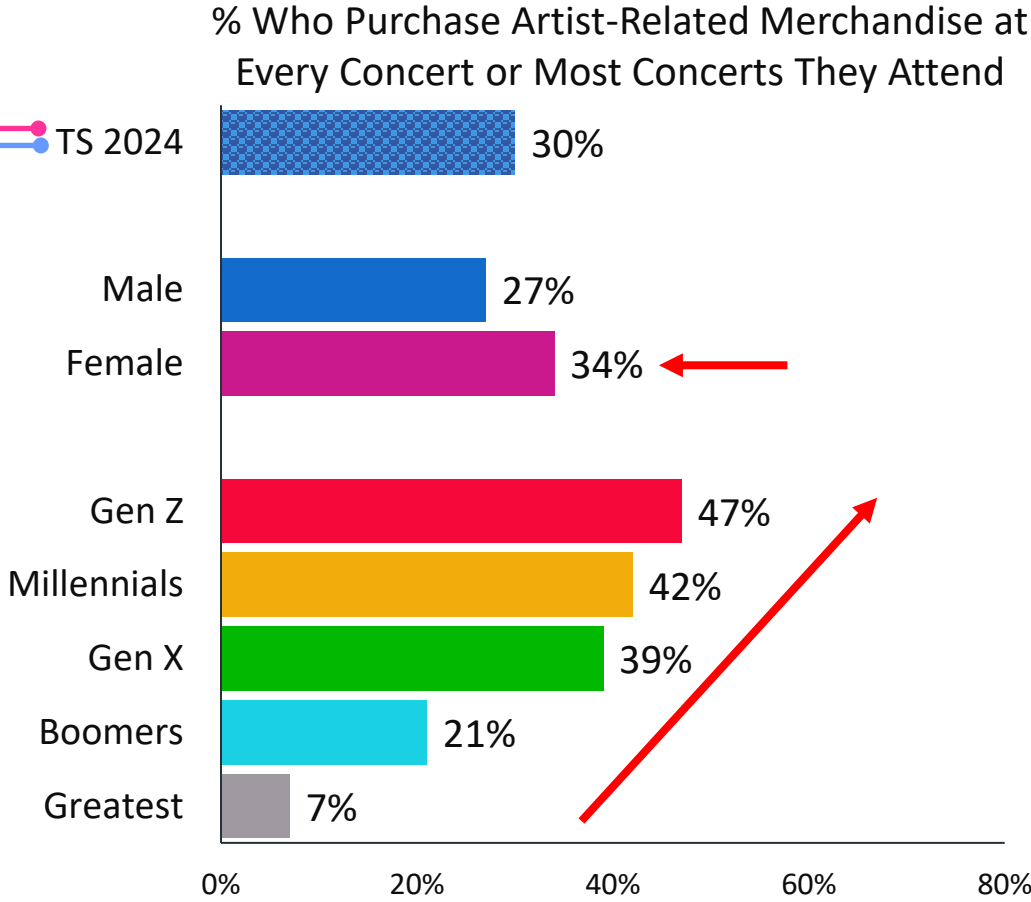
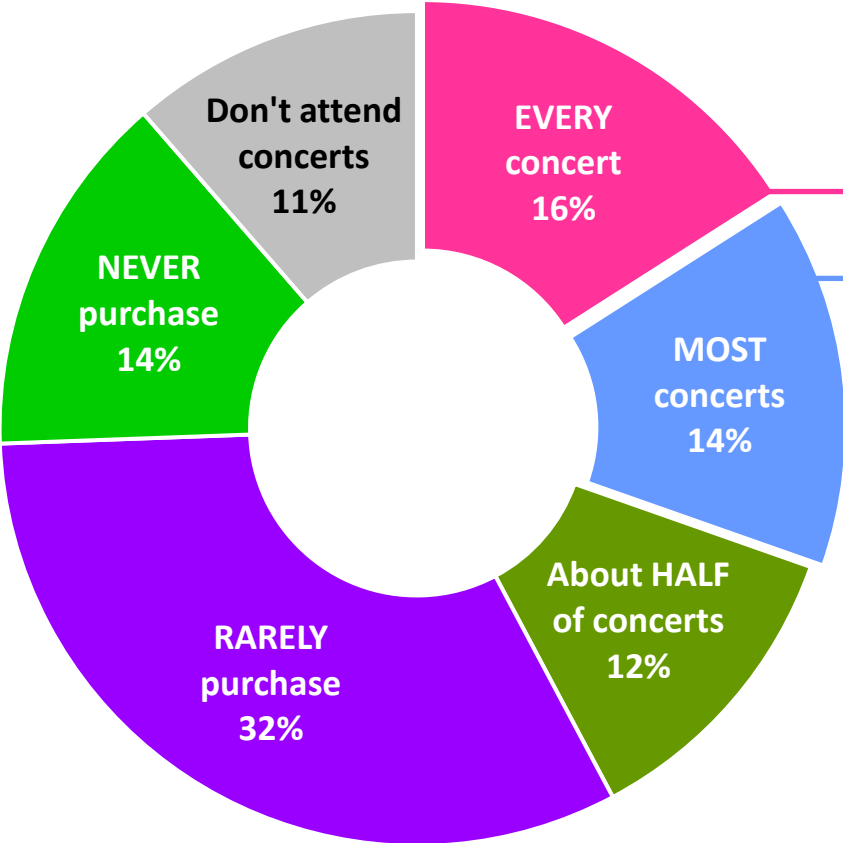
One in Six Music Concert Attendees in 2023 Paid For a VIP Package, Led By Younger Generations



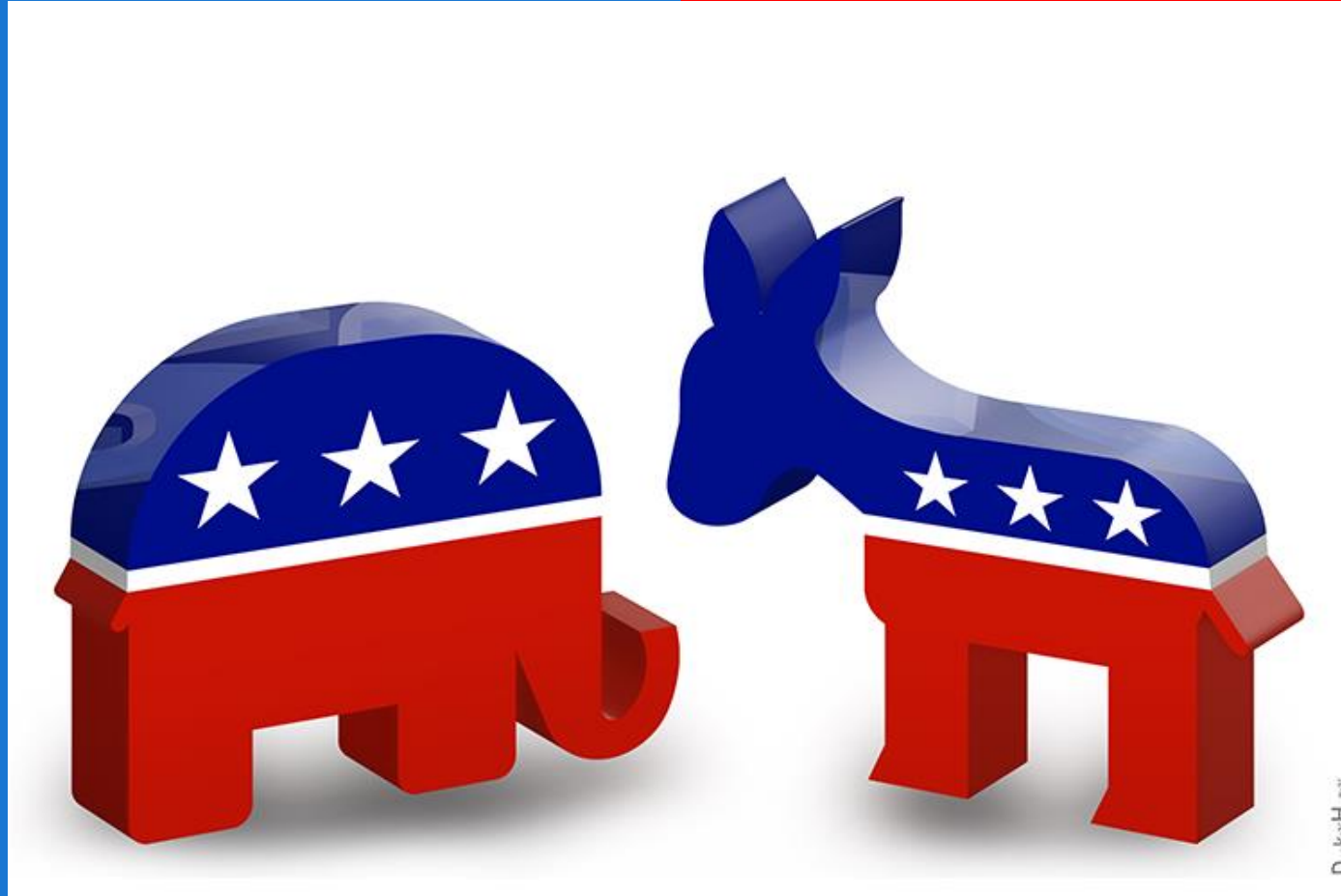
“Did you pay for any type of upgraded VIP package at any live music concerts in 2023?”



Three in Ten Purchase Merch For Most/Every Concert They Attend – Especially Progressively Younger Respondents



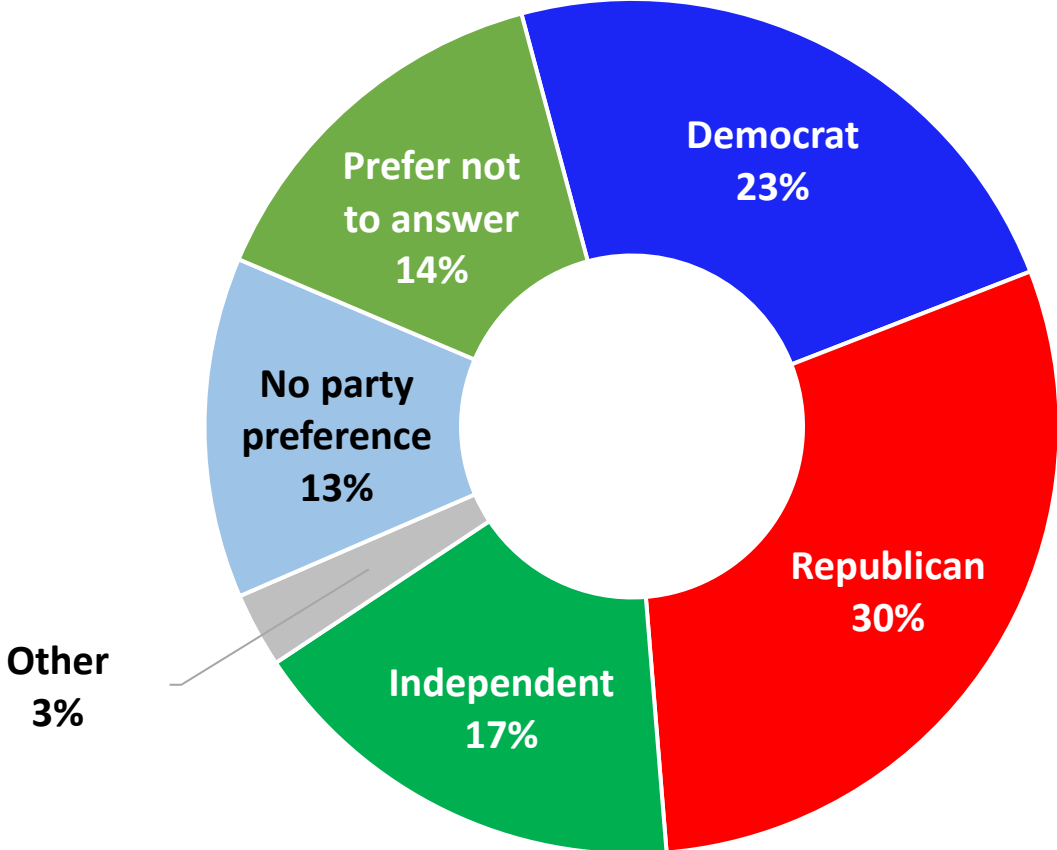
“When you attend a live music concert, how often do you typically purchase artist-related merchandise (shirts, hats, posters, etc.)?”



Politics & Radio

Political Party Preference

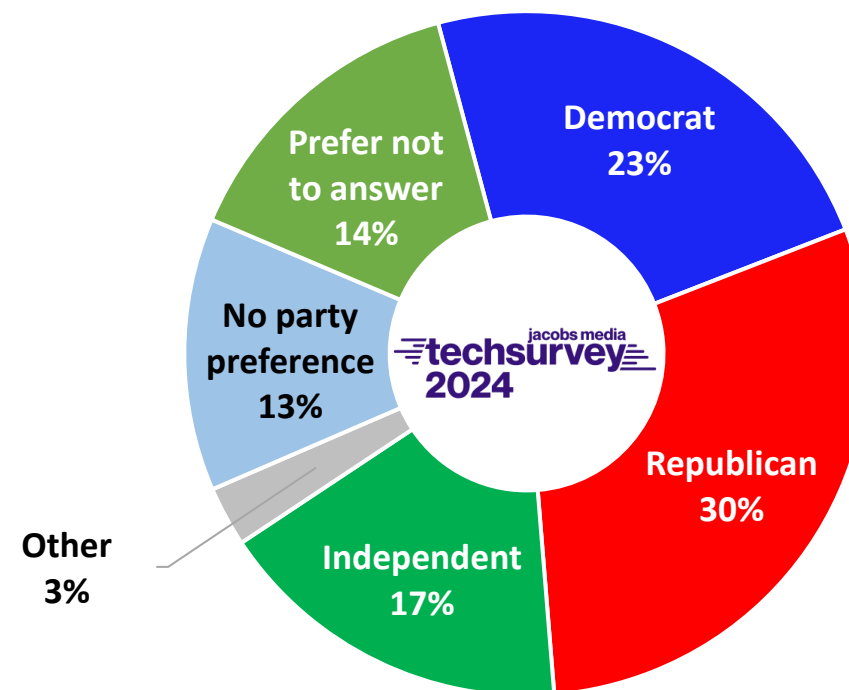
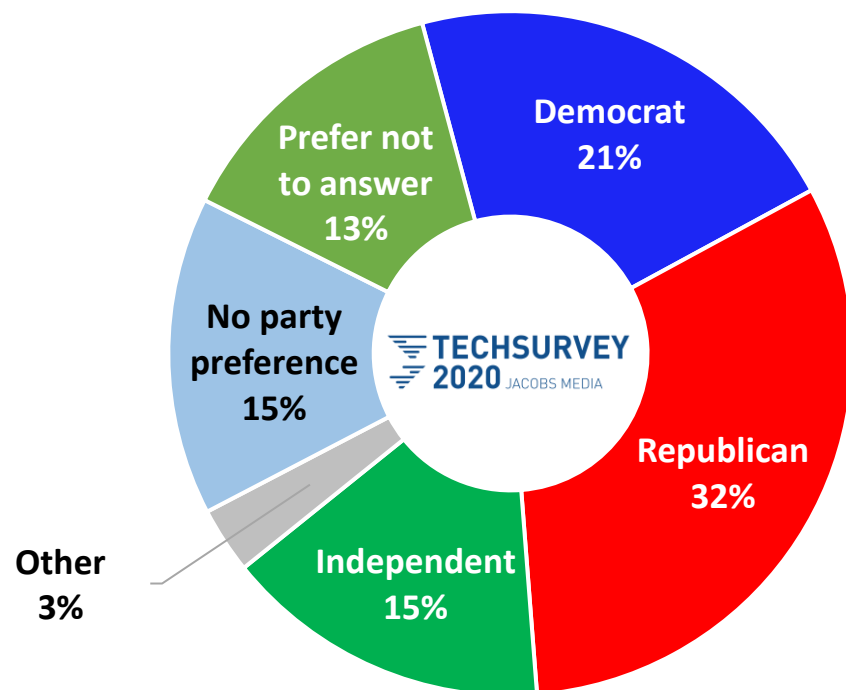
“How would you describe your political party preference?”



Among U.S. Respondents

Since 2020, There's Been a Two-Point Shift Toward the Democrats and Away From the GOP; Independents Are Up

"How would you describe your political party preference?"



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