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.
63% of Americans listen to AM/FM radio each day

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

89% of Americans listen to AM/FM radio each week

Source: Nielsen, Q2 2020
Radio has the biggest share of listening time
Commanding 41% of audio listening of U.S. adults age 18+

Source: Edison Research Share of Ear ® 2020 Q4
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
Radio Heads: Use radio for everything  
9% of radio listeners

Connection Seekers: Use radio for connection  
16% radio listeners

Infomaniacs: Radio listening is driven by news  
18% radio listeners

Rhythm Rockers: Radio listening is driven by music  
27% of radio listeners

Laid-back Listeners: Listen to radio in the background  
17% of radio listeners

Habitualists: Listen to radio when it’s the only option available  
13% radio listeners

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.

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

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

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

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

Source: Radio: Live On Air and Everywhere from NPR and Edison Research
Weekly AM/FM radio listeners vs. NPR listeners

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<th>Radio Heads</th>
<th>Connection Seekers</th>
<th>Infomaniacs</th>
<th>Rhythm Rockers</th>
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<td>AM/FM Radio Listeners</td>
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<td>NPR Listeners</td>
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<td>19</td>
<td>26</td>
<td>23</td>
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<td>11</td>
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Base: Listen to NPR in the last week (37%)

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

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<tr>
<th>Platform</th>
<th>% Typically Listen or Watch</th>
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<td>NPR</td>
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<td>Live or recorded television</td>
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<td>Social media</td>
<td>51</td>
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**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]?”

Base: Exposed to ad on [medium] in the last week
Source: Radio: Live On Air and Everywhere from NPR and Edison Research
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:

- **Radio Heads**: 72%
- **Connection Seekers**: 70%
- **Infomaniacs**: 65%
- **Rhythm Rockers**: 64%
- **Laid-back Listeners**: 59%
- **Habitualists**: 58%

"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?"

Base: Exposed to ad on radio in the last week
Source: Radio: Live On Air and Everywhere from NPR and Edison Research
As a result of hearing an advertisement on [platform], have you ever….?

- Considered a new company, product, or service: 46 AM/FM Radio, 45 NPR
- Gathered more information about a company, product, or service: 42 AM/FM Radio, 50 NPR
- Purchased a product or service: 34 AM/FM Radio, 36 NPR
- Recommended a product, company, or service to others: 27 AM/FM Radio, 40 NPR

Source: Radio: Live On Air and Everywhere from NPR and Edison Research
NPR Radio Sponsorship Impact
Percent lift for NPR radio listeners vs. non-listeners

+23% Brand awareness

+71% Reported website visits

+13% Interest in learning more about sponsor brands

Source: Lightspeed Research, NPR Sponsorship Studies 2018-2021
Radio vs. TV
Agree/Disagree: You learn about local businesses from advertising on [platform]

% agreeing

- AM/FM Radio: 47%
- TV/Streaming video: 31%
- NPR: 45%

Base: Used platform in the last week
Source: Radio: Live On Air and Everywhere from NPR and Edison Research
Agree/Disagree: Listening to/watching ads is a fair trade for the free content you get on [platform]

% agreeing

- AM/FM Radio: 47%
- TV/Streaming video: 36%
- NPR: 51%

Base: Used platform in the last week
Source: Radio: Live On Air and Everywhere from NPR and Edison Research
Agree/Disagree: Your opinion of a company is more positive when you hear it mentioned on [platform]

% agreeing

- AM/FM Radio: 29%
- TV/Streaming video: 25%
- NPR: 46%

Base: Used platform in the last week
Source: Radio: Live On Air and Everywhere from NPR and Edison Research
Agree/Disagree: You are more likely to trust a company that you hear advertised on [platform]

% agreeing

- AM/FM Radio: 28%
- TV/Streaming video: 24%
- NPR: 46%

Base: Used platform in the last week
Source: Radio: Live On Air and Everywhere from NPR and Edison Research
Agree/Disagree: [Platform] engages your mind in a more positive way than other media does

% agreeing

<table>
<thead>
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<td>AM/FM Radio</td>
<td>43</td>
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<tr>
<td>TV/Streaming video</td>
<td>41</td>
</tr>
<tr>
<td>NPR</td>
<td>59</td>
</tr>
</tbody>
</table>

Base: Used platform in the last week
Source: Radio: Live On Air and Everywhere from NPR and Edison Research
Agree/Disagree: [Platform] is becoming a more important part of your life

% agreeing

- AM/FM Radio: 33%
- TV/Streaming video: 44%
- NPR: 45%

Base: Used platform in the last week
Source: Radio: Live On Air and Everywhere from NPR and Edison Research
• 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
RADIO: LIVE ON AIR AND EVERYWHERE

npr.org/radioiseverywhere