RADIO’S ROADMAP TO GEN Z LISTENERSHIP
TODAY’S AGENDA

- Gen Z Overview
- Gen Z Listening Trends
- What it means for FM Radio
GEN Z VITAL STATS

- Born 1996-2012
- 65+ million in the U.S.
- Most racially diverse generation to date
- Truly the first digital natives
- Friends around the world
- Increasingly called “Zoomers”
ESSENTIAL GEN Z
aka ZOOMER TRAITS
- In the Know
- Change Agents
- Culture Creators
- Gen-Fluid
Methodology

Share of Ear, conducted by Edison Research
• 4,000+ interviews updated 1st Quarter 2020
• National sample 13+
• Online and offline
• Tracked since 2014
• Offered in English and Spanish

Qualitative Interviews, conducted by Front Row Insights
• Online interviews of adults in “Generation Z”
Representing Generation Z:

- Americans 13-24: 16%
- Americans 25+: 84%
Share of Ear
Share of Audio Listening by **Device** (Index vs. Total)

**AM/FM Radio Receiver**
- **Americans 13-24**: -50%
- **Americans 25+**: +10%

**Mobile device**
- **Americans 13-24**: +75%
- **Americans 25+**: -17%
Share of Ear

Daily Reach

- AM/FM radio: 55
- Streaming audio: 53
- YouTube: 42
- Owned music: 38
- SiriusXM: 16
- Podcasts: 16

Americans age 13-24

YouTube for music and music videos only
AM/FM Radio includes over the air and radio streams
Streaming Audio includes pure plays such as Pandora, Spotify, and others
Edison Research Share of Ear © 2020
Share of Ear

Daily Reach

- AM/FM radio: 70% (55% Americans age 13-24, 25% Americans age 25+)
- Streaming audio: 53% (29% Americans age 13-24, 24% Americans age 25+)
- YouTube: 42% (17% Americans age 13-24, 25% Americans age 25+)
- Owned music: 38% (22% Americans age 13-24, 16% Americans age 25+)
- SiriusXM: 16% (16% Americans age 13-24, 0% Americans age 25+)
- Podcasts: 9% (16% Americans age 13-24, 0% Americans age 25+)

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Share of Ear

Share of Time Spent Listening to **Audio Sources** (Index vs. Total)

**AM/FM Radio**
-50%  
+10%

**Streaming Audio**
+58%
-12%

**YouTube**
+98%
-22%

YouTube for music and music videos only
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Streaming Audio includes pure plays such as Pandora, Spotify, and others
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Share of Streaming Audio (Index vs. Total)

**Spotify**

+69%

-28%

**Pandora**

-41%

+16%

*Americans 13-24*  *Americans 25+*
Share of Ear

Audio Listening by **Location** (Index vs. Total)

- **Home**
  - Americans 13-24: +18%
  - Americans 25+: -6%

- **Car**
  - Americans 13-24: -28%
  - Americans 25+: +9%

- **Work**
  - Americans 13-24: -33%
  - Americans 25+: +6%

- **Other place**
  - Americans 13-24: +125%
  - Americans 25+: -25%

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Share of Ear

Share of Time Spent Listening to Audio Sources at Home (Index vs. Total)

Streaming Audio

- Americans 13-24: +37%
- Americans 25+: -11%

YouTube

- YouTube for music and music videos only
- Americans 13-24: +80%
- Americans 25+: -20%

AM/FM Radio

- Americans 13-24: +17%
- Americans 25+: -58%

YouTube for music and music videos only
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Share of Ear
Listening to **AM/FM radio** by device

**Americans Age 13-24**
- AM/FM radio receiver: 89%
- Digital: 11%

**Americans Age 25+**
- AM/FM radio receiver: 91%
- Digital: 9%

AM/FM Radio includes over the air and radio streams
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Share of Ear
Audio Listening by Content Type

Americans Age 13-24
- Music: 87%
- Spoken word: 13%

Americans Age 25+
- Music: 75%
- Spoken word: 25%

YouTube for music and music videos only
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What do you like about radio?
WHAT IT MEANS FOR FM RADIO

• Remember, news and info is social currency for Zoomers. Double down on these snack-size bits of social currency on-air.
• Remind these digital natives that FM radio is available digitally.
• Tap into their creativity and promotional expertise
• Help them change the world and their local community.
• Get more fluid, they love the surprise and delight moments that are unique to FM radio
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