



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



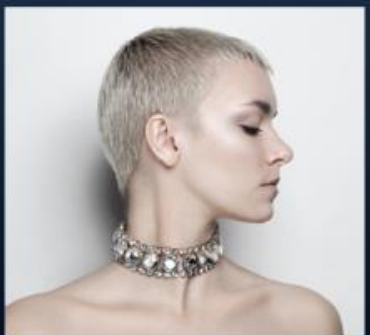
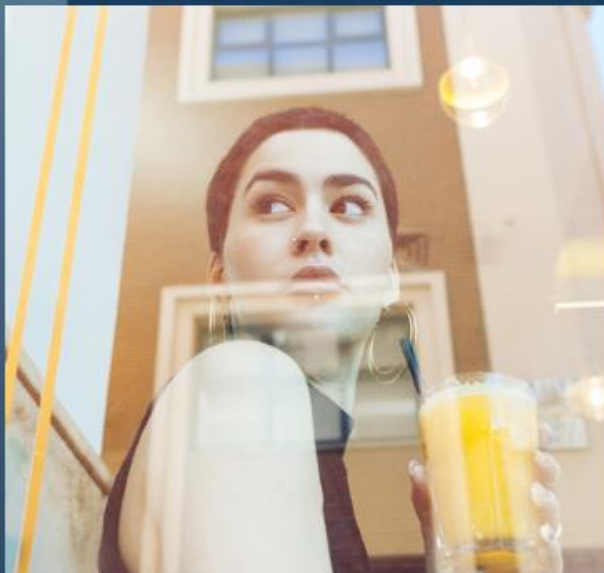
IN THE KNOW



CHANGE AGENTS



CULTURE CREATORS



GEN-FLUID



Methodology

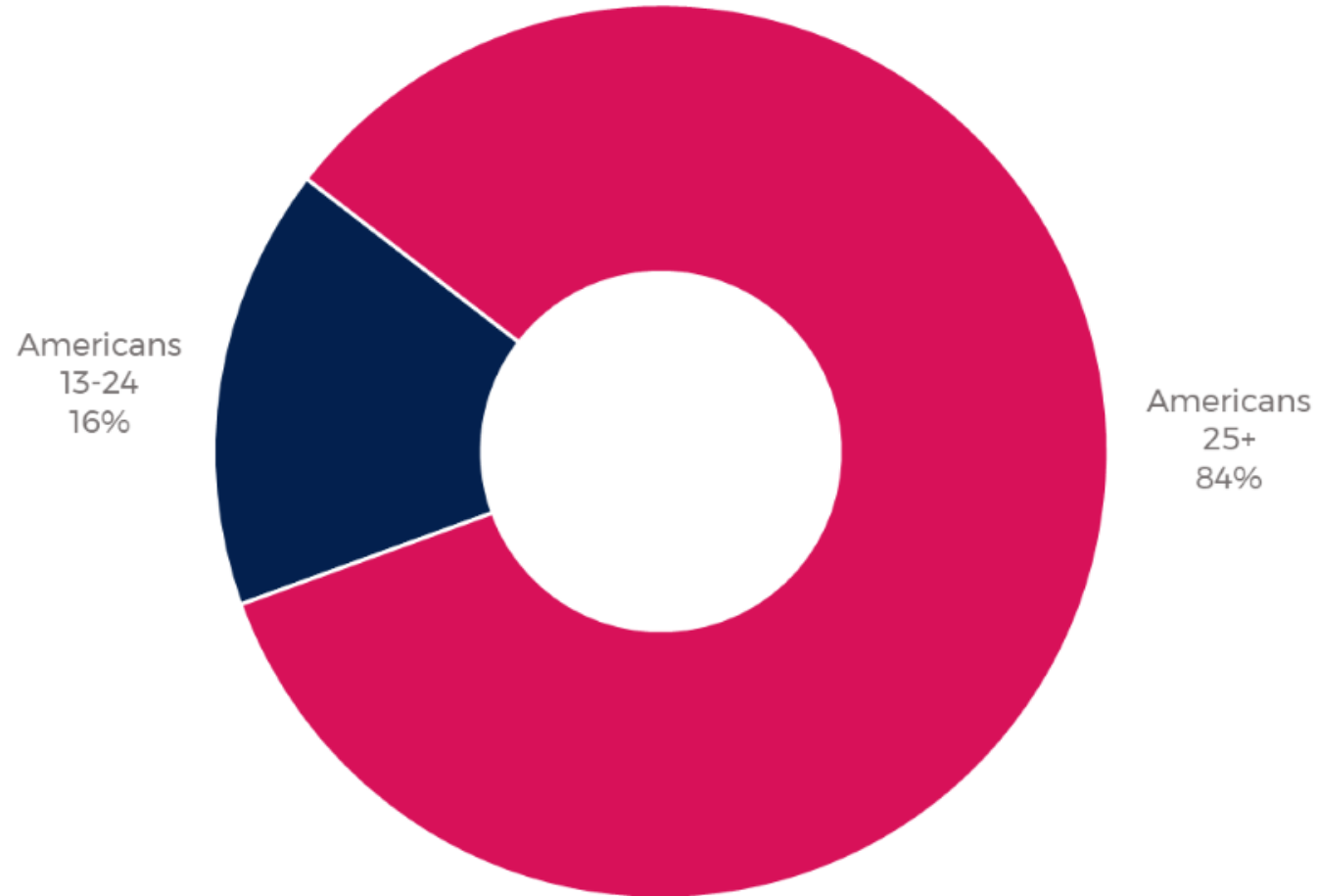
Share of Ear, conducted by Edison Research

- 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”

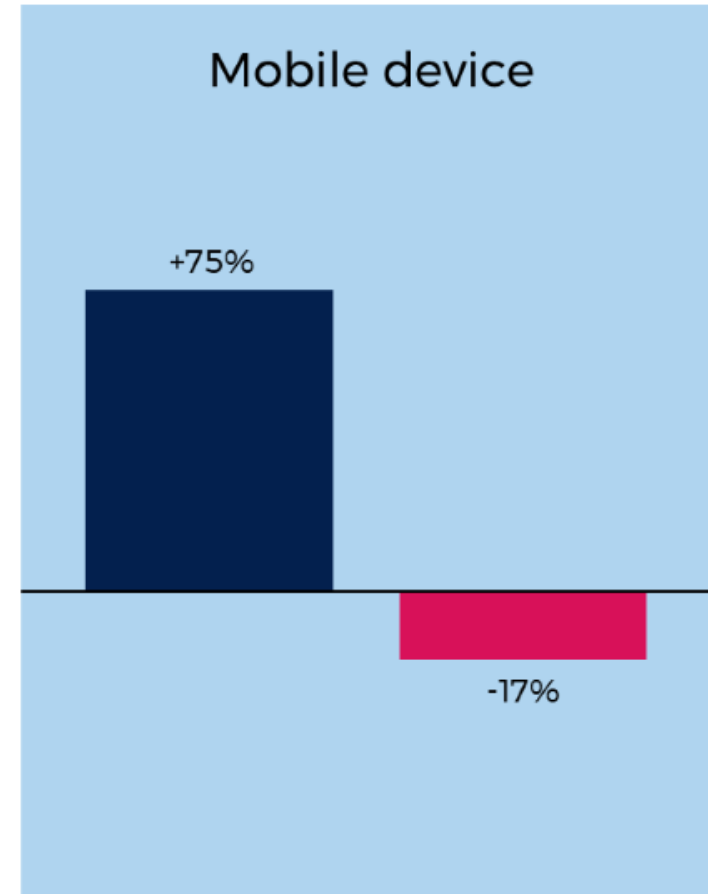
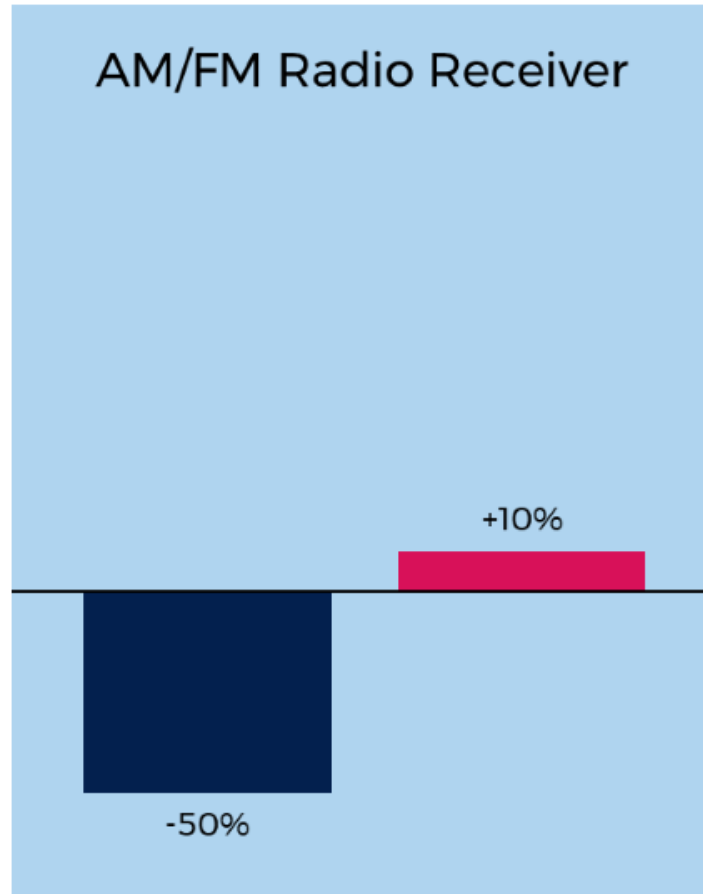
Representing Generation Z:





Share of Ear

Share of Audio Listening by **Device** (Index vs. Total)

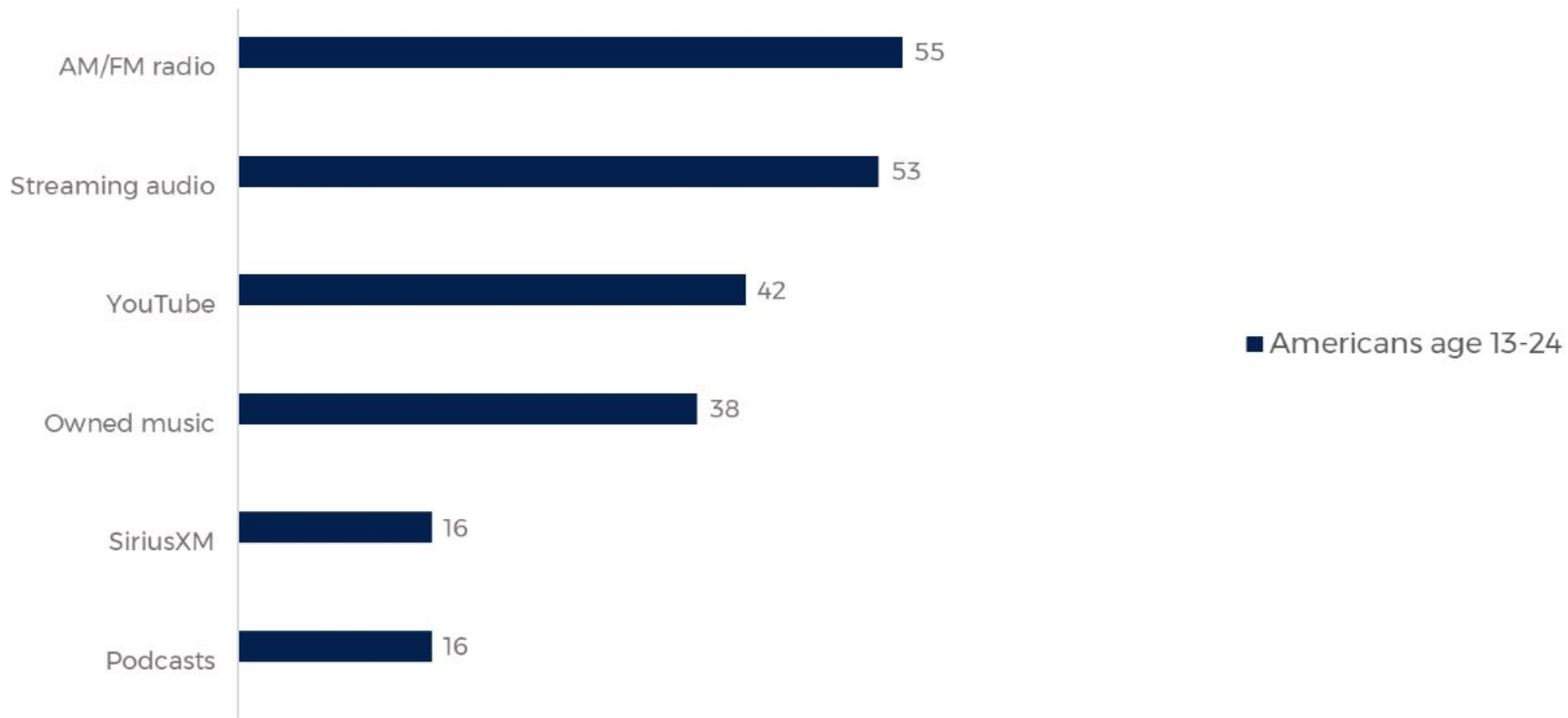


■ Americans 13-24 ■ Americans 25+



Share of Ear

Daily Reach



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

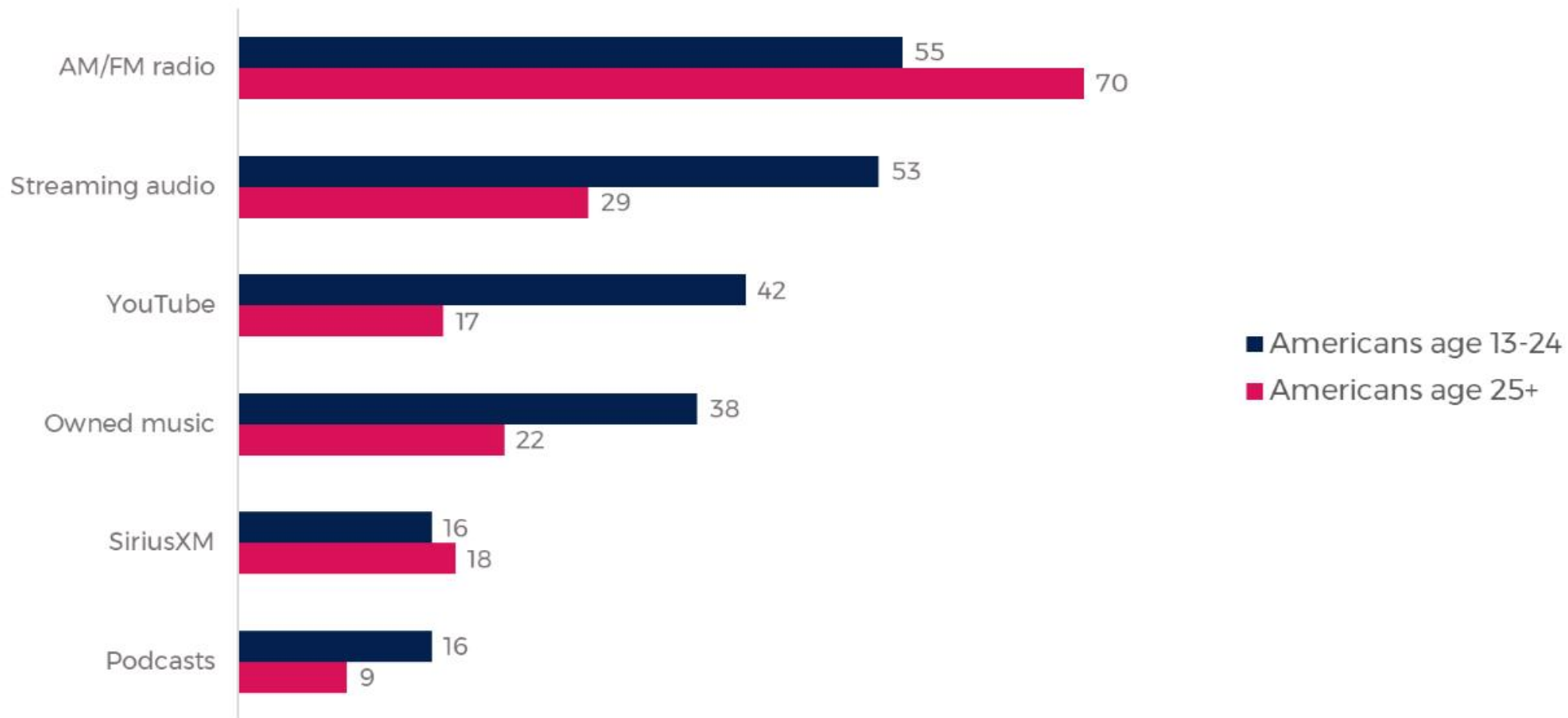
Edison Research Share of Ear © 2020

#genzradio



Share of Ear

Daily Reach



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

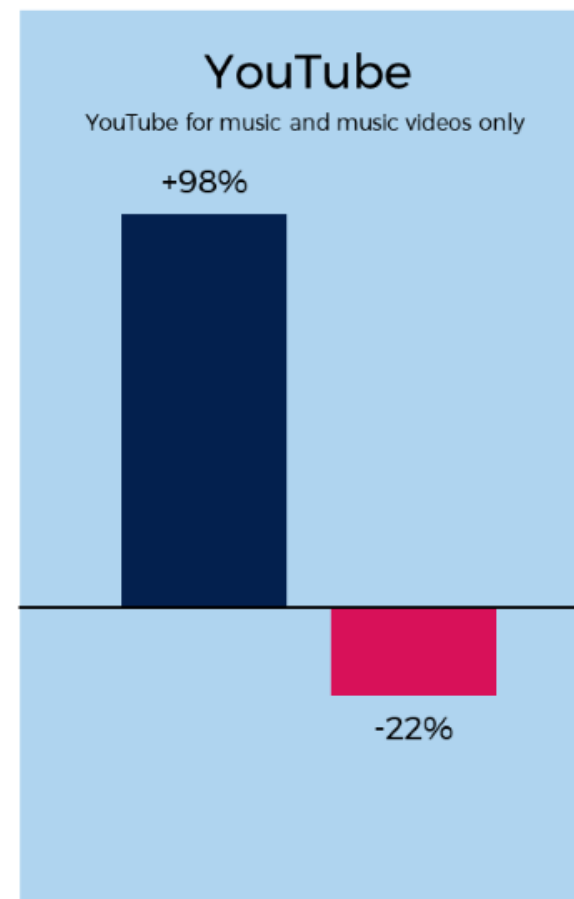
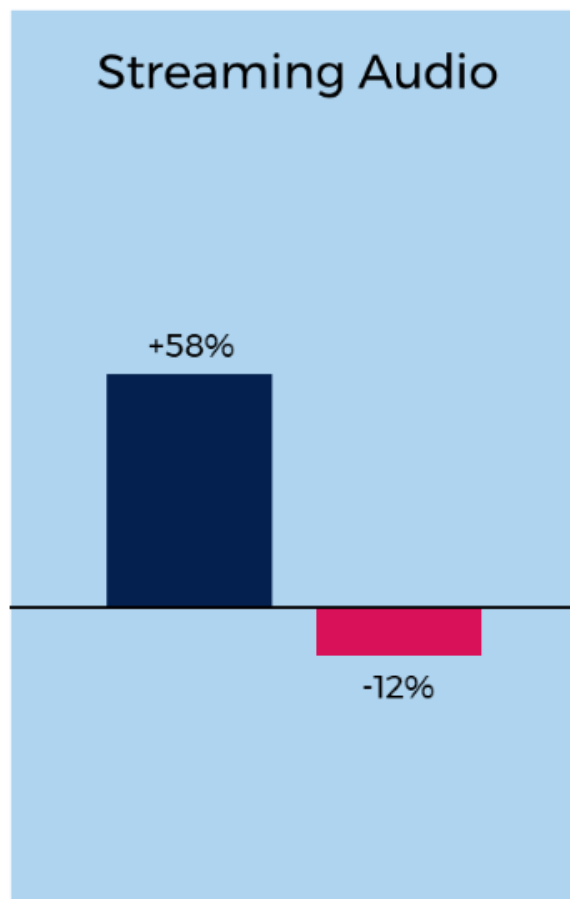
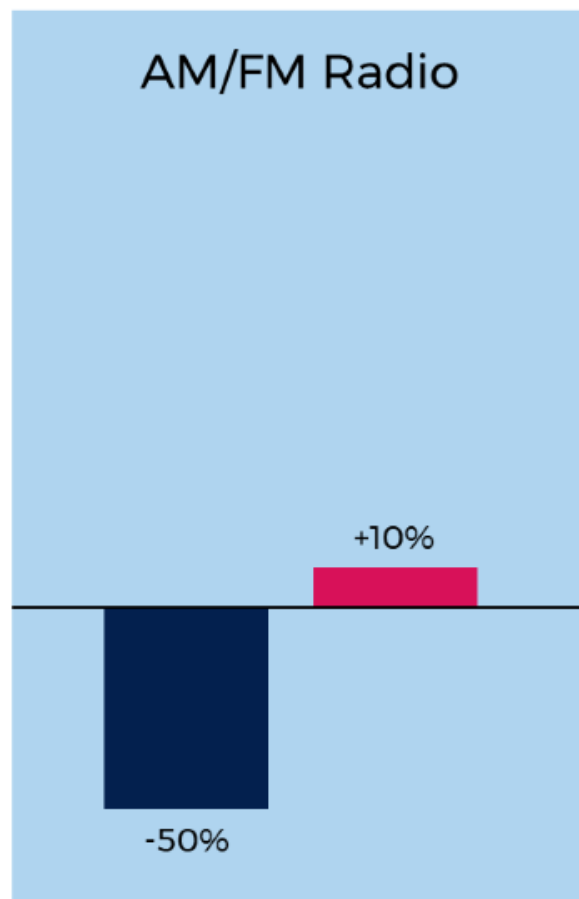
Edison Research Share of Ear © 2020

#genzradio



Share of Ear

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



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

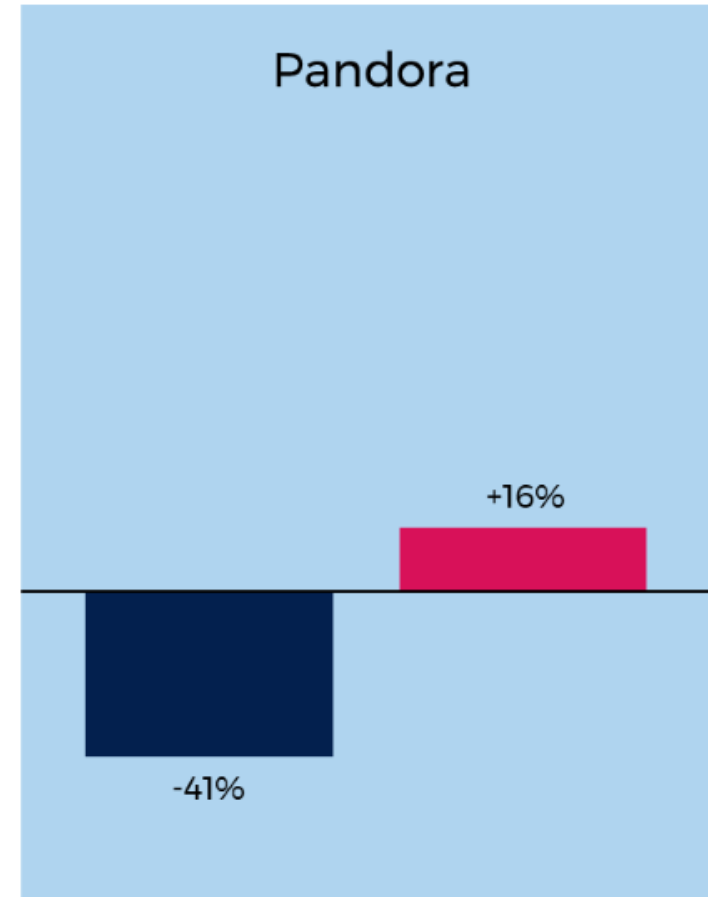
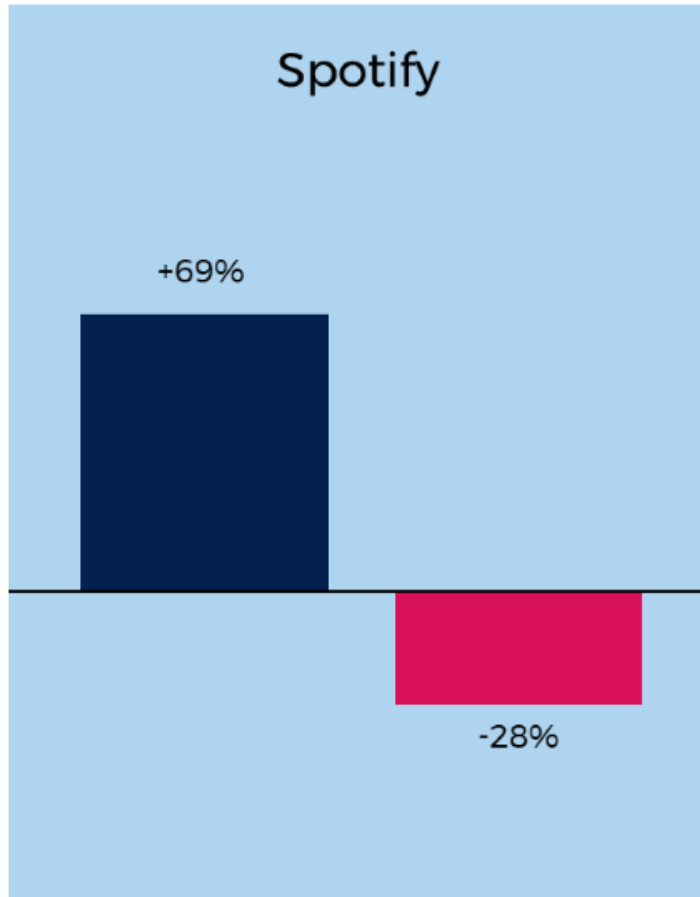
■ Americans 13-24 ■ Americans 25+

#genzradio



Share of Ear

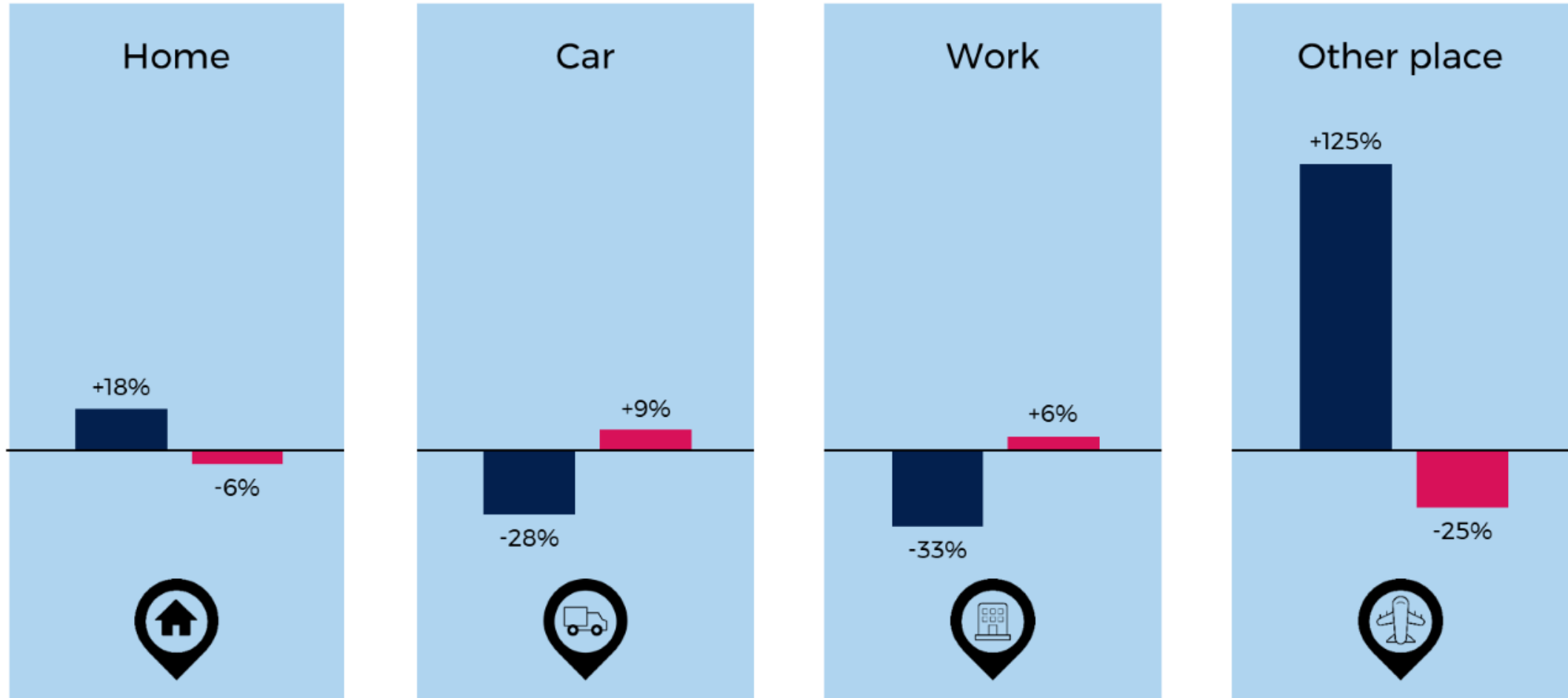
Share of **Streaming Audio** (Index vs. Total)



■ Americans 13-24 ■ Americans 25+

Share of Ear

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



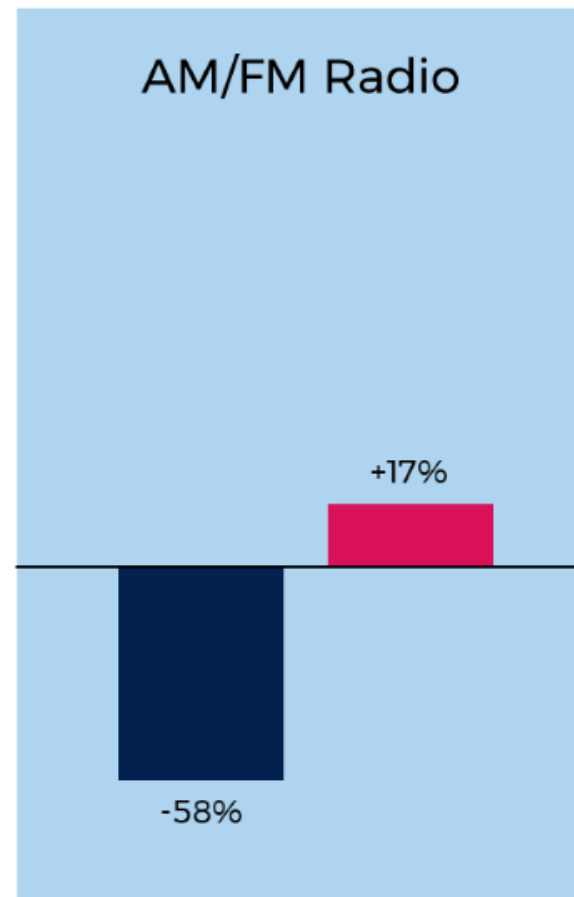
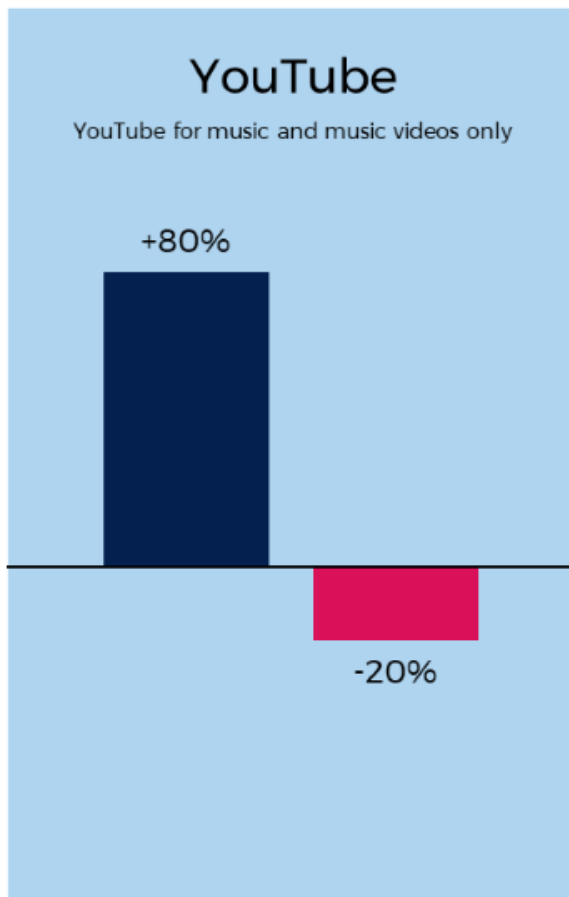
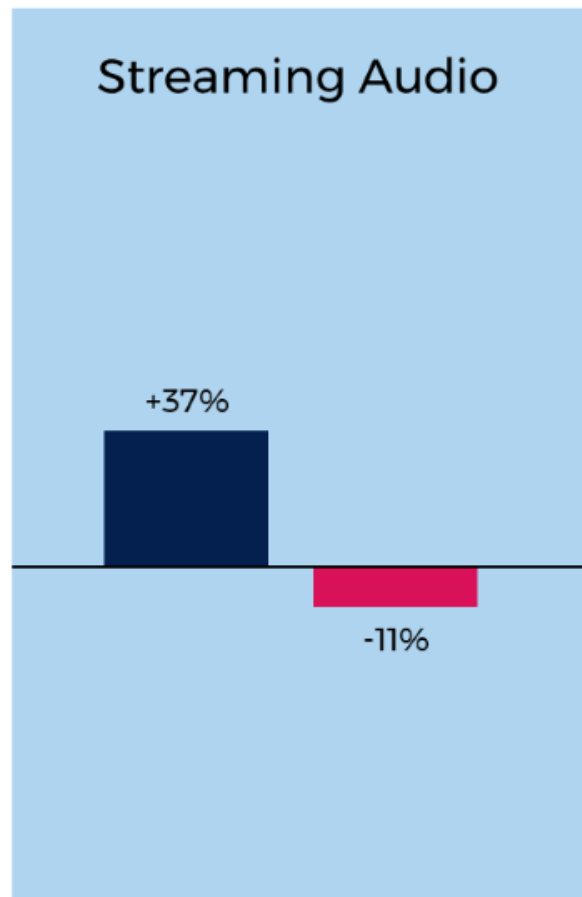
■ Americans 13-24 ■ Americans 25+

Share of Ear

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



Home



■ Americans 13-24 ■ Americans 25+

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

#genzradio



Share of Ear

Share of Time Spent Listening to Audio Sources *in a car/truck*

Americans Age 13-24



Americans Age 25+



YouTube for music and music videos only

AM/FM Radio includes over the air and radio streams

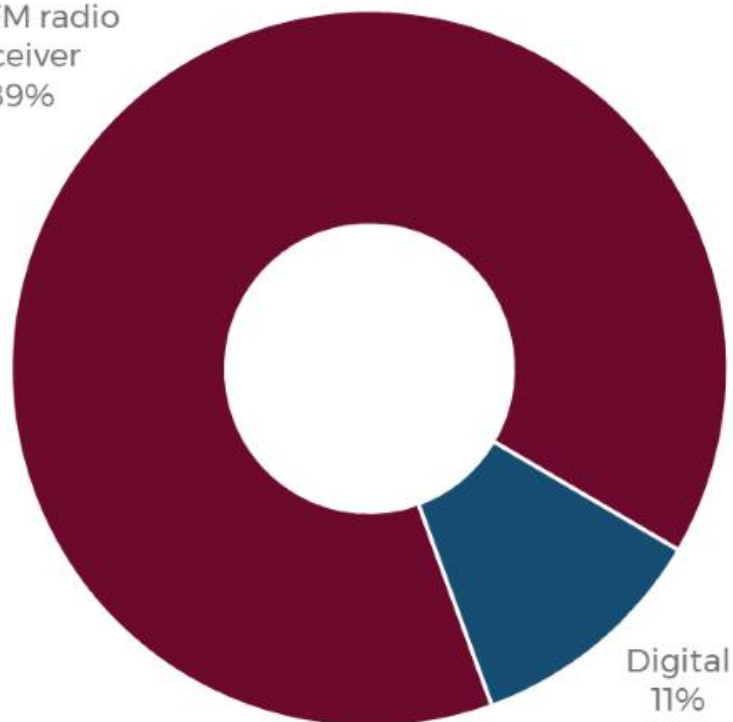
Streaming Audio includes pure plays such as Pandora, Spotify, and others

Edison Research Share of Ear © 2020

#genzradio

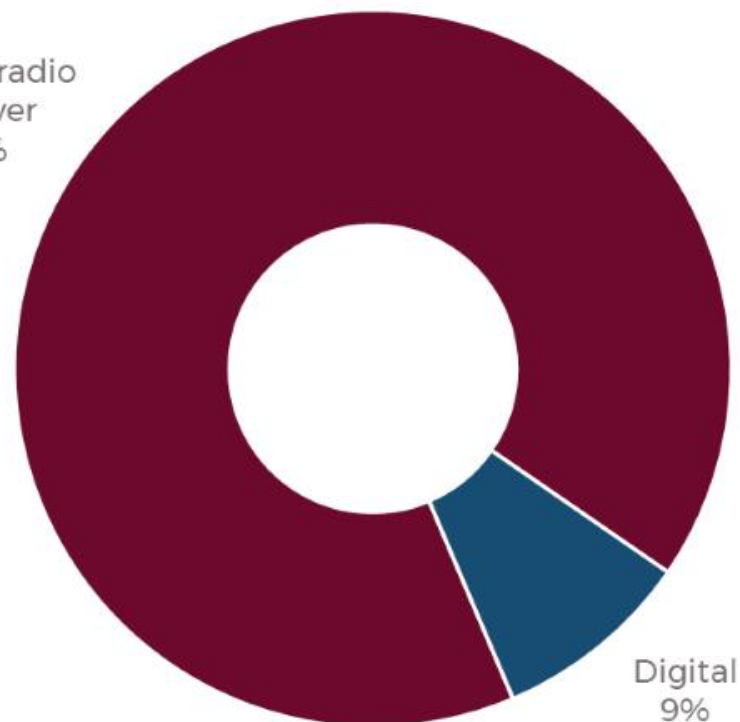
Americans Age 13-24

AM/FM radio
receiver
89%

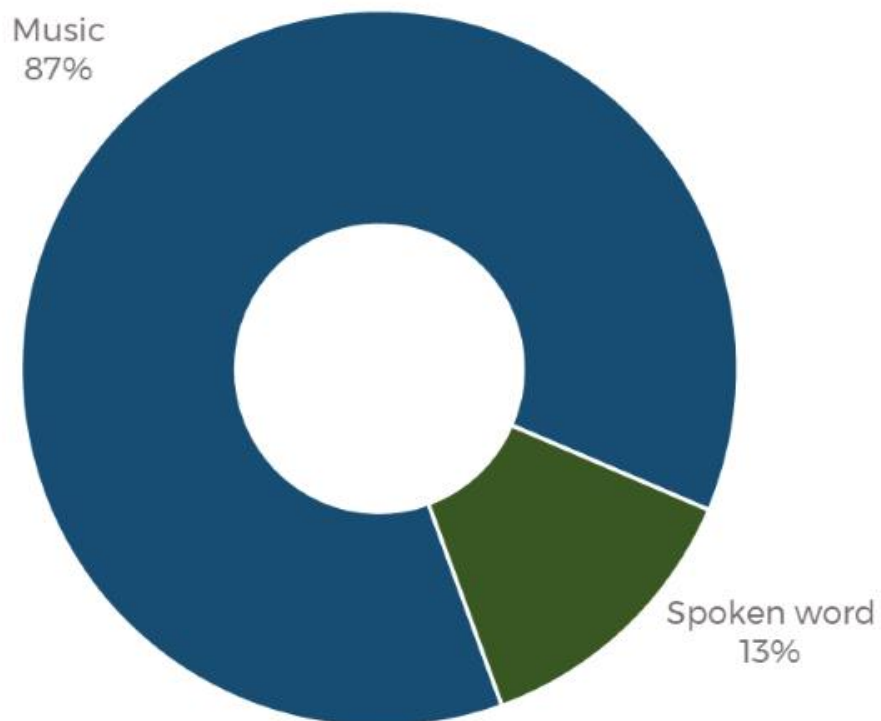


Americans Age 25+

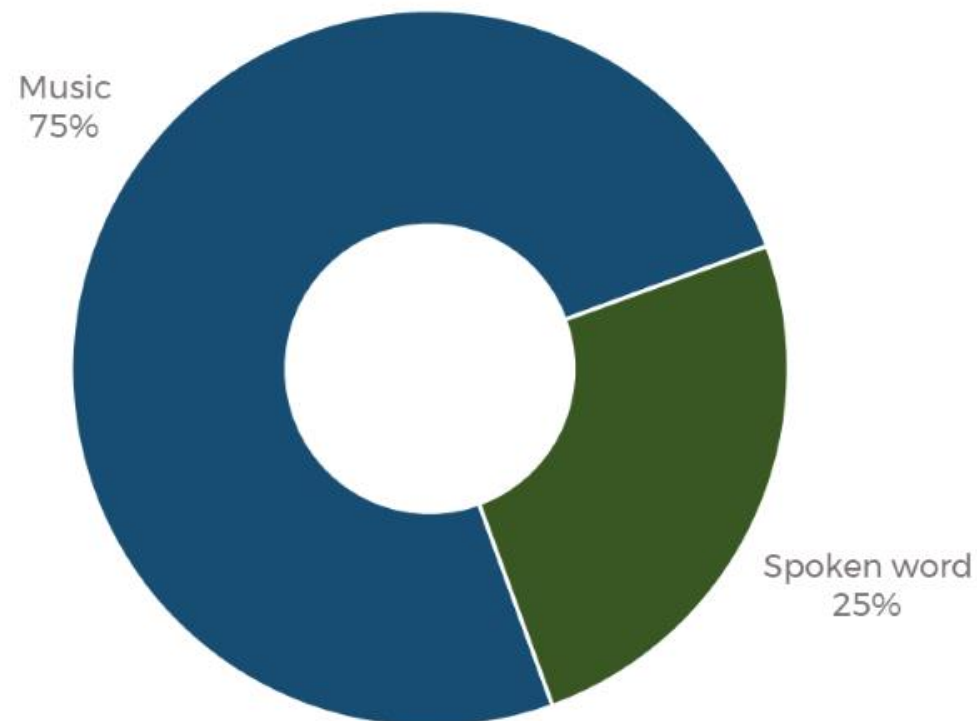
AM/FM radio
receiver
91%



Americans Age 13-24



Americans Age 25+



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

#genzradio

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



RADIO'S ROADMAP TO GEN Z LISTENERSHIP