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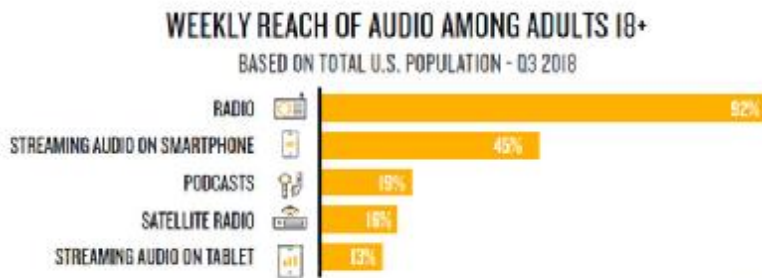
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Nielsen: Media Usage Shifts, But Radio Remains Consistent.

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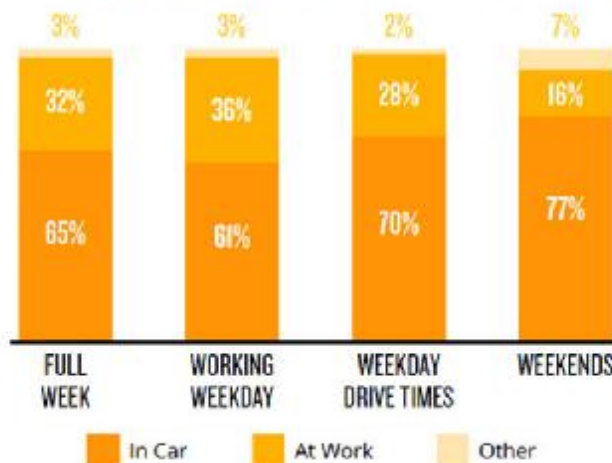
While the audio marketplace is continually expanding as a result of increased accessibility and emerging technology, radio remains front and center, reaching more Americans each week than any other media source, at 92% among U.S. adults 18+. That is more than twice the usage of the next audio platform in line, streaming audio on smartphones, at 45%. The just released Q3 Nielsen Total Audience Report has podcasts as the No. 3 most popular audio platform, with 19% of usage; followed by satellite radio, at 16%; and streaming audio on a tablet, 13%.



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One reason that radio maintains its broad reach is because of high usage taking place out of home. Automobiles are the most significant listening location, Nielsen reports, with 65% of all non-home radio use occurring behind the wheel. That number actually increases to 77% on weekends. Nearly one-third of non-home listening also occurs at work, "where consumers can multitask while they carry out their jobs," the study notes.

AWAY-FROM-HOME RADIO USE, BY LOCATION



Source: Nielsen National Regional Database, Spring 2018

The report offers detailed insight into how radio fits within the media ecosystem as a whole—and the medium certainly seems to be holding its own. In addition to its dominance as the most-used audio platform, radio also rules among various races: In addition to its 92% percent reach by total Americans 18+, it is utilized by 93% of Blacks and 97% of Hispanics.

Compared to other audio and video platforms, live+time-shifted TV reach is still robust, but it has declined to 86% from 88% in Q3 2017. Internet-connected devices experienced the greatest year-over-year increase, rising from 30% to 37% in Q3 2018. Across all platforms, the largest year-over-year media declines came from Internet on a computer usage, which dropped to 53% from 58%, but app/web on a smartphone reach grew from 76% to 80% while app/web on a tablet increased to 46% from 41%. Game console play accounts for 15%, and DVD/Blu-Ray for 13%.

Readjusting Media Habits

In short, the report says: “People are readjusting their habits and aligning them to match their preferred devices, but the time spent on media has remained consistent throughout the past year.”

Offering an overview of the report, Peter Katsingris, senior VP of audience insights for Nielsen, writes in his summary, “Considering what connecting with media was like five, 10 or 20 years ago, consumers today are pretty lucky. They can customize their media behaviors and fit them perfectly with their needs—be it their life schedule, their interests or their location.” Assessing the data, he adds, “The one thing many adults in the U.S. have in common is that we spend a good part of our waking days with media. Overall total media use among U.S. adults remains unchanged year-over-year at 10-and-a-half hours per day. But there are shifts in where that time being spent is dedicated, as we see increases in Internet connected devices and app/web smartphone usage that are gradually replacing time spent on other sources.”

That 10:30 total that adults spend with media daily is quite the heady statistic—and it remains consistent year over year with Q3 2017, although some shifts did occur across individual platforms. Radio accounts for 1:44 per day of time spent with media by adults 18+, exhibiting a slight decline over 2017, when the total was 1:48. Live TV has decreased more, to 3:44 today from 3:54 a year ago. Time-shifted TV remains stable, at 30 minutes daily, with Internet-connected devices claiming 29 minutes, internet on computers 31 minutes, apps/webs on a tablet 43 minutes—and app/webs on a smartphone second to live TV, at 2:31. That number is up from last year’s 2:14.

Exploring the share of time spent on each platform by demographics “gives additional insights into how users are consuming media,” according to Nielsen. Adults 18-34 spend 47% of their time on digital platforms and 37% watching TV and TV-connected devices, compared to 42% digital and 40% TV and TV-connected devices in Q3 2017. Adults ages 50-64, who spend the most overall time across all platforms of any age group, spend 51% of their time watching TV and TV-connected devices and 31% on digital platforms. It’s interesting to note that among all platforms, radio is the most consistent—meaning its usage is nearly even across age groups. The airwaves consistently account for between 15% and 18% of daily media use; with the highest percentage 18% from ages 50-64, then 17% 35-49, 16% 18-34, and 15% 65+.

Probing deeper into media time by demographics, Nielsen reveals intriguing patterns that emerge across various age groups. Time spent with media per day increased among adults age 18-34 and 65+ but decreased year-over-year among adults 35-49 and 50-64. Additionally, time spent on TV-connected devices and app/web on smartphones increased across all demographic groups. Time per day on smartphones increased by 23 minutes for both adults 18-34—more than any other group or platform,

while live+time-shifted TV and Internet on a computer experienced the largest declines across all age groups. For radio—with 18+ daily usage at 1:44—18-34 is 1:22, down 6 minutes year over year; 35-49 is 1:47, also down 6 minutes; 50-64 is 2:06, down 3 minutes; and 65+ is 1:44, down a minute.

The Nielsen Total Audience Report methodology includes radio data based on Nielsen RADAR and the National Regional Database. Streaming audio on smartphone and tablet are based on Nielsen's Total Media Fusion. Podcasts are based on Nielsen's Podcast Fusion Data. Satellite Radio is based on Nielsen Scarborough USA+. Television data are derived from Nielsen's National TV Panel based on a sample of 40,000 homes. And digital data is based on Nielsen's Total Media Fusion, which is reflective of both panel and census measurement.

