Tech Poll V – 2009
Executive Summary

April 2009

Brief Snapshot

- Radio listeners continue to use and adopt new technologies and gadgets, and this year's study reflects more change. In this new Technology Poll, the "big gainers" in terms of overall usage include

    - audio and video streaming,
    - social networking, and
    - text messaging.

  Almost the entire sample now owns a cell phone and has access to a hi-speed Internet connection. Never have radio audiences had so much access to so many different entertainment and information sources.

- In-home radio listening continues to wane, as respondents utilize other media in their residences. Fortunately for broadcast radio, in-car listening continues to show positive momentum, as does listening to AM/FM radio via a computer. Respondents also say they are somewhat more likely to be listening to broadcast radio while they work. However, when it comes to tuning in AM/FM stations while walking, exercising, or working around the house, more than four in ten simply don't listen this way, and as many say they are listening less as say they are listening more while moving about. This data reflects past studies, suggesting that radio has rapidly lost its portability to devices such as iPods. And in-car listening is threatened by the increasing penetration of iPod connectivity in vehicles.

- But broadcast radio is enjoying gains in other places. Audio streaming experiences a significant usage rise in Tech Poll V, as nearly 4 in 10 respondents use Internet radio on at least a weekly basis. The leading streaming sources continue to be the stations sending the survey, as well as other local market outlets, reinforcing the value of well-known, hometown brands. Of the national and global sites listed, Pandora is the only player to have experienced major gains from year to year. As past studies have shown, streaming begets more listening, and that's the case in this '09 study.

- Since this poll began five years ago, we have tracked incredible gains in iPod ownership. Finally, we are seeing a slowdown, but it is noteworthy that these gadgets have reached a stage of critical mass in ownership. Now, more than six in ten respondents own one. Alternative fans wouldn't be caught dead without an iPod-like device. But another theme from Tech Poll V emerges – Classic Rockers are catching up technologically. In fact, now half of these older listeners own an mp3 player. As noted above, the iPod has essentially usurped the Walkman (and its forerunner, the transistor radio) as *the* portable music device. And this study also shows healthy growth for Apple's iPhone and iPod Touch – now owned by 12% of the entire sample. As noted earlier, iPod fans are continuing to connect these devices to the cars and trucks they drive.

- The cell phone sits at the base of this Tech Poll's "Media Usage Pyramid," symbolizing its superiority. Overall, 95% now own a cell phone, and texting as a primary form of communication continues to mushroom, moving considerably higher than even the meteoric leap we saw in last year's study. Additionally, taking and sharing pictures is a popular feature on mobile devices, along with the alarm feature. As we pointed out in Tech Poll IV, these cell phone alarms threaten the long-standing dominance of the AM/FM clock radio on millions of nightstands. Today, as more and more cell phone owners wake up to their phone alarms, another key radio listening location is threatened – the one that starts many people's days with morning radio.

- While video streaming continues to profile as a popular activity, a shift may be taking place. YouTube is still the top-accessed website, but its overall usage is lower, while network television sites, Hulu, and even local radio station video streaming are all moving higher. For a medium and activity that didn't even exist just a few short years ago, video streaming has emerged as a dominant source of entertainment.

- Social networking sites have made another huge jump, and this year's study indicates that Facebook has passed MySpace in overall usage. It is also noteworthy that a growing number of Classic Rockers visit these sites, too. Of course, they have become virtually standard fare among younger listeners and Alternative fans.

- The benefits of on-demand and consumer control are underscored by the fact that nearly half now have access to a TiVo or DVR, leading to more television viewing for a substantial percentage of these respondents. And podcasting – radio's version of control and time-shifting – continues to be a steady force that is highly sponsorable.

- Videogame play is steady and strong. And music-based games like "Guitar Hero" and "Rock Band" are becoming even more popular – and responsible for selling a lot of music.

- While satellite radio subscribership is up a tad, there's little momentum associated with this medium, despite the merger of Sirius and XM. Overall, satisfaction among subscribers continues to erode, and only half say they will absolutely continue with Sirius XM through 2009. In addition to the economic problems associated with new customer acquisition, Sirius XM is running into even more formidable barriers relating to retention.

- HD Radio awareness has improved, as has the percentage of consumers who have purchased one of these radios. But ownership numbers are still small, the barriers are many, and the percentage of consumers who report a willingness to purchase an HD Radio continues to show no growth. A lack of knowledge and exposure to HD Radio continue to profile as the chief impediments to buying one of these devices.

- Despite being nonplussed about the quality of *new* music being released, the vast majority of respondents (including Classic Rockers) have purchased music in the past year. The CD is the format of choice, but a hefty percentage of consumers say they purchase digital downloads. As has been the case in past years, FM radio continues to be the top source for new music exposure, leaving all other sites and outlets well back in the pack.

- The newspaper industry is challenged, as fewer than 6 in 10 participants in Tech Poll V say they are regular readers. Notably, younger readers lean toward the online version of newspapers, while the upper demos prefer the traditional print edition.

- For the first time in five years, listenership to public radio has taken a healthy jump. More than one-third of this rock radio audience now tunes in public radio at least weekly, perhaps bolstered by the fall Presidential campaign, as well as other major news stories, such as the economy, that keep current events in the media forefront.

- In a new question series in this year's poll, respondents rated their most desirable radio station website features. Leading the pack is music, concert, and entertainment listings. Yet, a look at many radio stations' websites reveals that this type of information is often not very prominent or missing altogether.

- The economy plays a major role in this survey, as more than 9 in 10 respondents express concern about their/their family's financial well-being. More than half say they are optimistic about President Obama's ability to improve America's troubling economy.

Those are some of the major findings that emerged from Tech Poll V. For a more detailed report of the findings, read on.

Methodology & Limitations

Tech Poll V is a follow-up survey to our four previous studies, conducted among Rock radio listeners. Each has been fielded early in the first quarter of each year.

This year's study was conducted from February 17- March 8, 2009. Data was collected from 21,143 respondents from a total of 64 Classic, Mainstream/Active, and Alternative stations in markets as diverse as Los Angeles, Philadelphia, Knoxville, and Omaha.

No single station contributed more than 2.8% of the responses to the survey. Responses were collected by an email invitation to take the survey, sent to members of each participating station's email database. All data was collected online, and efforts were made to prevent duplicate submissions.

Web polls have inherent limitations, and this one is no exception. They are unscientific, thus margin of error calculations are not computed. Unlike a national Gallup Poll (for example) where quotas and weighting are used to ensure the sample accurately reflects the universe being measured, web polls do not attempt to balance demographic or geographic sampling.

There are other biases that come into play, too. This includes respondents who opted to become database members, and whether the Tech Poll invitation itself was opened, read, and acted on. Thus, they may not be representative of the overall audiences that listen to these participating stations. Respondents may also be more tech savvy than the average Rock radio listener.

Despite these limitations, 21,000+ completed surveys across 64 stations represent a lot of people. The results are very interesting, and in many cases, track very closely with each preceding year's study. A case in point is that the gender makeup of the 2009 poll – 60% men and 40% women – is virtually identical to the previous four studies.

Sample Demographics

Detailed Sample Demographics

Comparing this year's study to the previous polls:

	2007	2008	2009
Men	59%	59%	60%
Women	41%	41%	40%
Under 18	2%	2%	2%
18-24	11%	11%	8%
25-34	25%	25%	20%
35-44	29%	29%	18%
45-54	27%	27%	32%
Over 55	6%	7%	10%
Married – 1st time	39%	39%	39%
Single (never married)	25%	25%	21%
Single (divorced/sep)	1%	1%	1%
Remarried	13%	13%	14%
Living with someone	7%	8%	8%

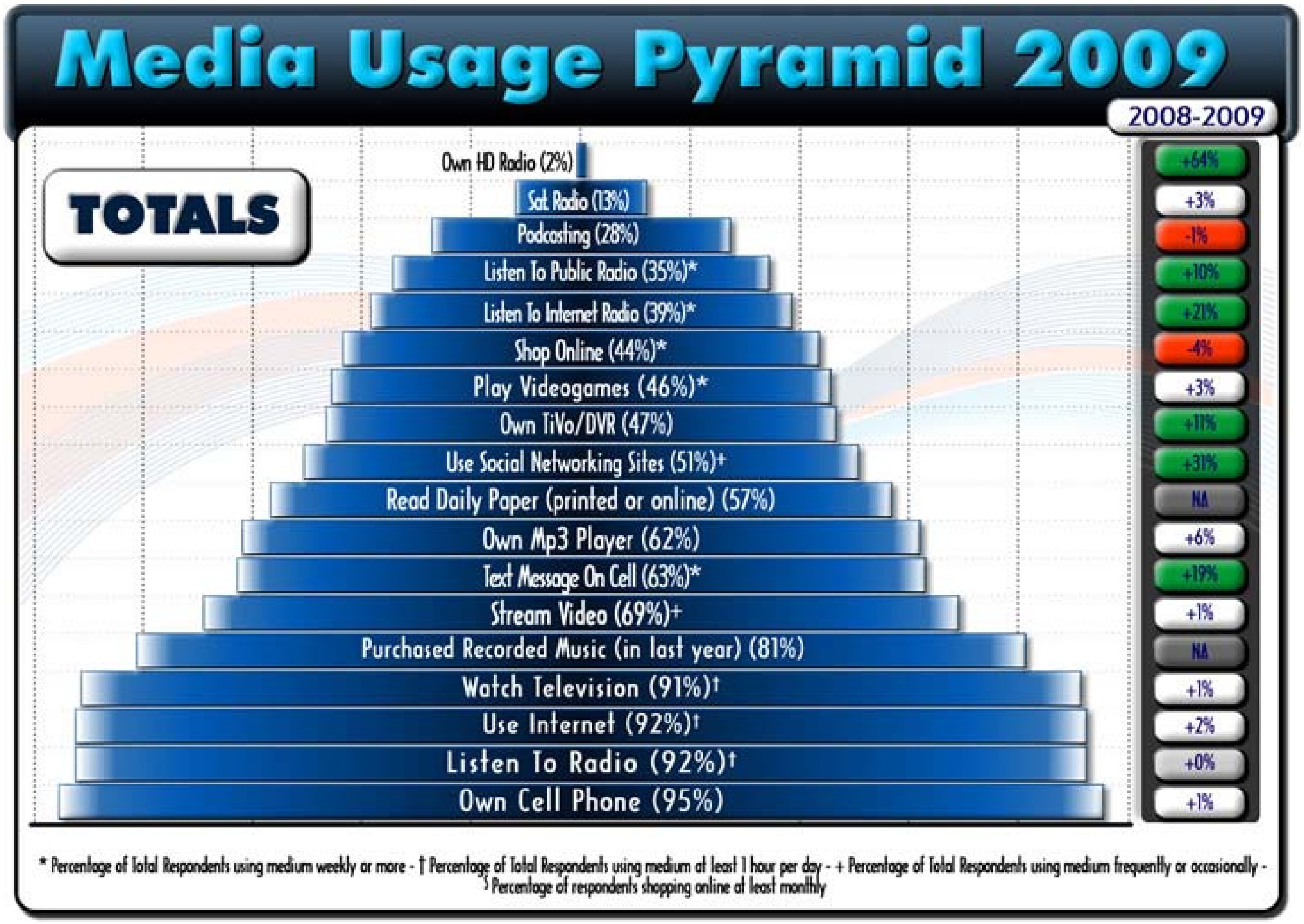
	2007	2008	2009
High school grad	20%	19%	20%
Some college	32%	31%	30%
Tech school/comm. college	17%	17%	18%
College degree (Bachelor's)	21%	22%	22%
Post graduate degree	6%	7%	7%
Early adopters (new products)	9%	8%	8%
Hispanic	2%	4%	3%
Republican	*NA*	22%	22%
Independent	*NA*	21%	23%

Format Breakdowns:

	2006	2007	2008	2009
Classic Rock	45% (N = 11,581)	44% (N = 11341)	47% (N=12691)	47% (N=9831)
Mainstream/Active Rock	36% (N = 9,236	37% (N = 9467)	31% (N=8460)	37% (N=7774)
Alternative	19% (N = 4,878)	16% (N = 4182)	22% (N=5880)	17% (N=3538)

	2005	2006	2007	2008	2009
Willingness to participate in this type of survey again:	67%	68%	62%	62%	62%

Media Usage Pyramids



We have built these visual usage hierarchies for the past five years because they are an excellent graphic device to illustrate how radio listeners use old and new media, as well as gadgets, and how these habits are changing over time. The pyramids are especially important in understanding the media/devices that radio listeners use, and their relative “pecking order.” There are significant changes this year that are important for radio managers to understand. The column at the far right of each pyramid shows the change in each medium/activity/gadget from last year’s levels.

The biggest gainer with significant critical mass is social networking site usage (+31%), and now impacting half the total sample base.

Text messaging (+19%) is a phenomenon that also continues to grow at a rapid pace from year to year, becoming a major form of how people communicate with one another.

Listening to Internet radio has also risen (+21%), suddenly experiencing a major increase in weekly (and daily) usage.

While iPod/mp3 ownership has begun to level out a bit (+6%), these devices now are owned by more than 60% of the total sample. Podcasting is essentially flat from year to year, as nearly 3 in 10 say they have downloaded and listened to this type of content in the past year.

While watching streaming video is also near last year's level, it is of significance to point out that 7 in 10 respondents consume this type of content frequently/occasionally – an amazing statistic, given the relative "newness" of this medium.

Satellite radio subscribership has increased marginally (+3%), but is still very much in the minority – thus, its place near the top of the pyramid. And at the very top, HD Radio ownership now sits at 2% (+64%). Creating more penetration for HD Radio is a challenge, given the many activities, choices, and gadgets that occupy much larger segments of the pyramid.

Radio listenership, TV viewership, and Internet usage for at least one hour/day or more are all very steady from year to year.

There are two new pyramid items of note:

Regular newspaper readership is a habit common to just under 6 in 10 respondents.

And more than 8 in 10 say they have purchased recorded music in the past year.

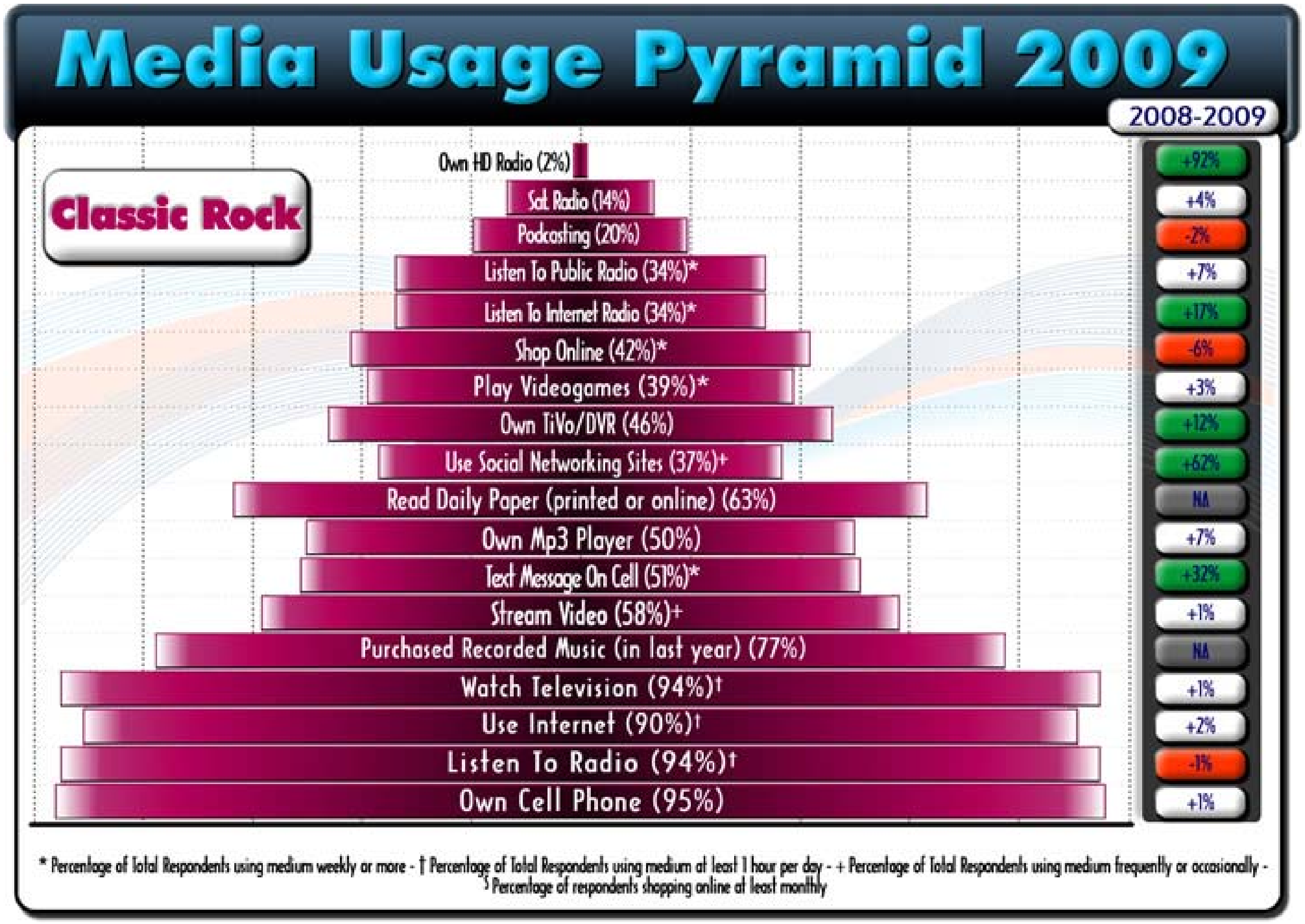
Format Pyramids

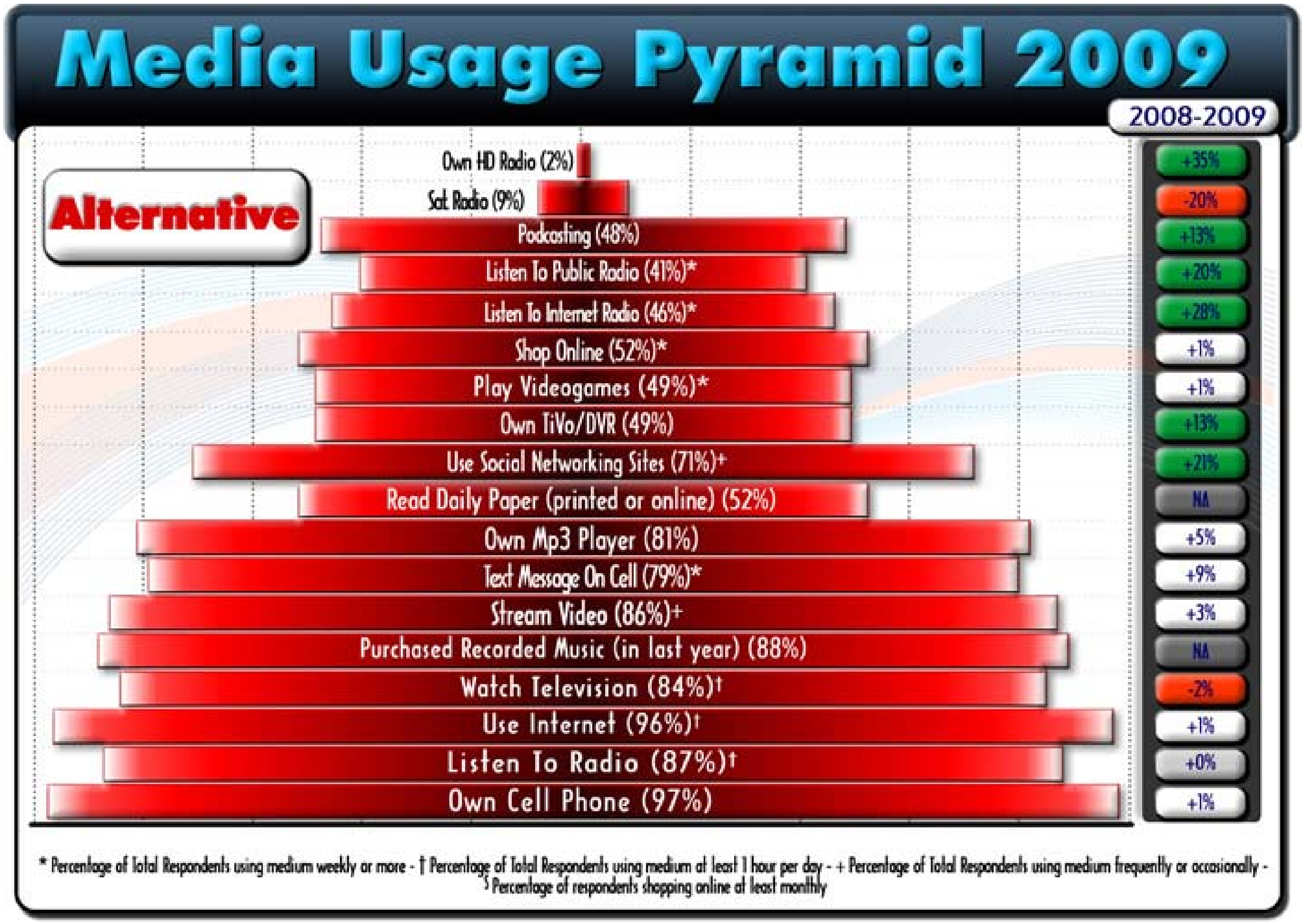
Each year, we build pyramids for the three major format groups represented in the sample, and we recommend that local stations compare their findings to the national totals for their respective formats.

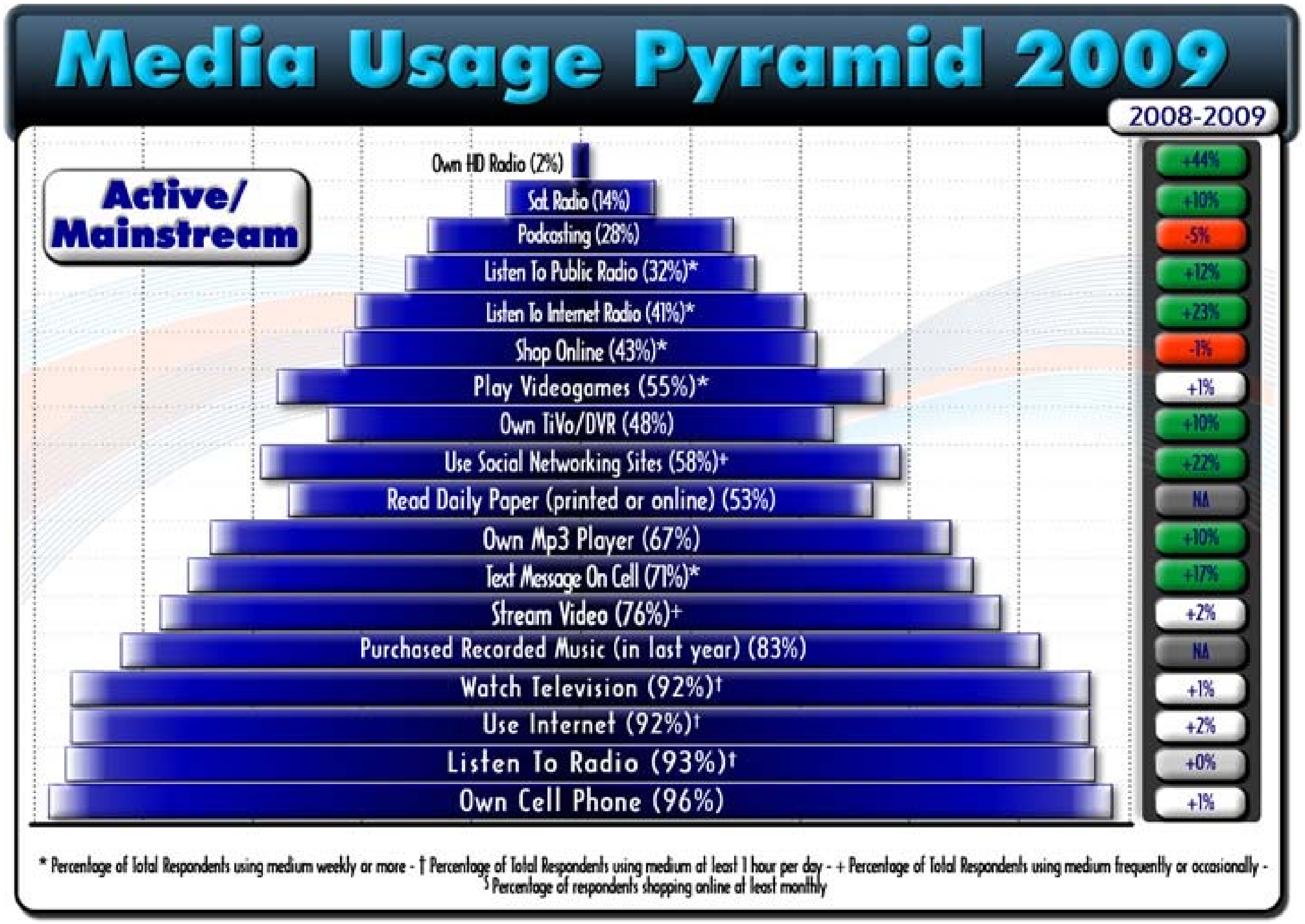
Note that in reviewing each format pyramid, the overall order uses the "Totals" pyramid as the standard. In this way, the usage differences between the overall sample versus format fans is apparent. As has been the case each year, Alternative listeners are the most media-active, while Active/Mainstream respondents are typically higher than the average.

Alternative fans continue to take advantage of new media and gadgetry at a stunning pace. More than 8 in 10 now own personal mp3 players and stream video. Better than 7 in 10 use or visit social networking sites, while nearly half listen to streaming audio. Their only decreases? Satellite radio and television viewing.

While Classic Rockers are somewhat less likely than the norm to partake in many of the media activities listed on the pyramid, their adoption rates are growing quickly. In this survey, it is clear that these older consumers are catching up, especially when it comes to social networking participation and iPod ownership.


Media Usage Pyramid 2009
2008-2009
Classic Rock
Own HD Radio (2%)
Sat Radio (14%)
Podcasting (20%)
Listen To Public Radio (34%)*
Listen To Internet Radio (34%)*
Shop Online (42%)*
Play Videogames (39%)*
Own TiVo/DVR (46%)
Use Social Networking Sites (37%)+
Read Daily Paper (printed or online) (63%)
Own Mp3 Player (50%)
Text Message On Cell (51%)*
Stream Video (58%)+
Purchased Recorded Music (in last year) (77%)
Watch Television (94%)†
Use Internet (90%)†
Listen To Radio (94%)†
Own Cell Phone (95%)
+92%
+4%
-2%
+7%
+17%
-6%
+3%
+12%
+62%
NA
+7%
+32%
+1%
NA
+1%
+2%
-1%
+1%
* Percentage of Total Respondents using medium weekly or more - † Percentage of Total Respondents using medium at least 1 hour per day - + Percentage of Total Respondents using medium frequently or occasionally - § Percentage of respondents shopping online at least monthly


Media Usage Pyramid 2009
2008-2009
Alternative
Own HD Radio (2%)
+35%
Sat. Radio (9%)
-20%
Podcasting (48%)
+13%
Listen To Public Radio (41%)*
+20%
Listen To Internet Radio (46%)*
+28%
Shop Online (52%)*
+1%
Play Videogames (49%)*
+1%
Own TiVo/DVR (49%)
+13%
Use Social Networking Sites (71%)+
+21%
Read Daily Paper (printed or online) (52%)
NA
Own Mp3 Player (81%)
+5%
Text Message On Cell (79%)*
+9%
Stream Video (86%)+
+3%
Purchased Recorded Music (in last year) (88%)
NA
Watch Television (84%)†
-2%
Use Internet (96%)†
+1%
Listen To Radio (87%)†
+0%
Own Cell Phone (97%)
+1%
* Percentage of Total Respondents using medium weekly or more - † Percentage of Total Respondents using medium at least 1 hour per day - + Percentage of Total Respondents using medium frequently or occasionally -
§ Percentage of respondents shopping online at least monthly



Key Findings – Technology

In this section, we examine technology in general, but also how "old media" is being impacted by technological change.

- More than one-third (34%) say they are usually the first to buy or earlier than most when it comes to buying new products. Not surprisingly, 18-34s are more apt to fall in this group, as are Alternative fans. Conversely, more than four in ten (41%) describe themselves as being late or among the last to purchase new products and services. Keep that in mind as you review some of the spectacular year-to-year changes on the pyramids.

- The "One Can't Live Without" technology, medium, or gadget is now a close call between the Internet, television, and cell phones. FM radio is well down this list. But demographically, cell phones and the world wide web are the clear-cut choices among 18-34s, while it's the Internet and TV that wins out among 25-54 year-olds. For women, it's about mobile devices, whereas men place their highest priorities on the Internet and television.

- Television continues to benefit from the “Control-Variety-Choice” attribute that we discovered during 2007’s “The Bedroom Project” ethnographic study. Tech Poll V reveals that nearly half (47%) have a TiVo/DVR connected to a television – a 10% jump from last year. And of these consumers, a third (32%) say they are watching more TV as a result.

- The car has always been an important center of media consumption – especially for radio. But technology advances are creating more consumer variety in vehicles, not unlike what has occurred on the home front. In the next vehicle they buy or purchase, the most desirable item (besides an AM/FM radio and CD player) is the ability to connect an iPod or mp3 player. This year, nearly half (47%) of those who indicate they’re planning on purchasing/leasing a new vehicle in ’09 say this feature is very important. A GPS is mentioned by nearly one-fourth (24%), followed by a DVD player (18%), satellite radio (16%), Sync (11%), and an HD radio (9%).

Key Findings – Internet Radio/Streaming

- As noted earlier in this summary, Internet streaming has experienced a healthy jump. Today, four in ten (39%) say they listen to streaming audio *weekly*, almost double the totals from our first study in ’05 (23%). Alternative listeners and iPhone owners are especially likely to profile as weekly (and even daily) streamers. This year, 97% say they have regular access to a hi-speed Internet connection which clearly enables this increase in streaming activity.

- Where do “streamies” go for entertainment? As has been the case in past Jacobs Media Technology Polls, streaming leadership belongs to “the station that sent me this survey” (52%, up from 49% in ’08). Additional streaming sources include other local stations (47%), indicating that while listeners can access any stream from around the globe, their inclination is to gravitate to a hometown source. This is an important finding because it illustrates the importance of marketing and promoting a station’s stream, especially before the Internet becomes commonplace in cars.

  Other streaming sources include radio stations from around the U.S. (21%), and Pandora, which is a rising streaming star. Overall, Pandora’s usage among “streamies” is now at the 20% level, up from last year (12%), and 2007 (6%). Other streaming sites, such as Sirius XM, iTunes, AOL Radio, NPR, and Rhapsody are at the 12% level or below, and showing no gains from last year.

- The good news for radio is that more and more stations in this survey are streaming. Overall, respondents indicate more than eight in ten (84%) now provide this service. And it translates into more listening. As a result of the station streaming, an impressive majority (53%) say they now listen to these stations a little more or a lot more, particularly iPhone owners. This is yet another strong indication that when radio provides additional access point on the Internet, it begets more listening.

- A new question in this survey asks about streaming radio listening access points. Of those who stream, 95% say their preferred device is the computer, while 4% mention mobile devices. There are indications that streaming on phones is somewhat more common among Alternative listeners and 18-29s. And no surprise – nearly one-fifth (17%) of iPhone/iPod Touch owners say they listen to audio streams on mobile devices. This is a strong indicator that offering radio streams on iPhones and similar devices leads to amplified usage.

Key Findings – Cell Phones

- First and foremost, cell phone ownership has now hit the 95% mark in Tech Poll V. And as noted earlier, many respondents now report that it is their most indispensable device.

- We continue to see multi-various cell phone uses – beyond talking. Texting - #1 in '08 at 70% - has now moved up to 78%. It is followed by taking/sharing pictures (64%, up from 56%), and the alarm feature (57%, up from 55%). As we warned last year, using the alarm function on mobile devices threatens the future of the nightstand clock radio.

  Other key cell phones features mentioned by more than 25% include the (tip) calculator, address book, ringtones, and games. In almost all cases, Alternative fans tend to be more apt to utilize many of these features (especially the alarm, texting, photos, and games). It is also noteworthy that women have a greater propensity to text, download ringtones, use the alarm function, and take/share pictures than men.

- There are other mobile device features – that while still not near the top of the list – are rapidly growing in popularity and usage. We refer to them as "smartphone functions," because they include web browsing, watching video listening to mp3s, recording video, sending/receiving email, GPS/Google Maps, and information updates (news, weather, sports, etc.). All of these are showing solid growth from year to year, and are especially popular among owners of iPhone and Touch devices. As consumers upgrade to new smartphones and more sophisticated mobile devices, it is clear the usage of these other features will increase with rapidity.

- On at least a *daily* basis, more than half (56%) now use text messaging (up from 44% last year, and 32% in '07). This represents astonishing growth for texting as a key communications tool, especially among 18-34s. Not surprisingly, nearly three-fourths (73%) of Alternative fans text at least every day, but so do four in ten (42%) Classic Rockers. And to punctuate the strong habit that some texters develop, three in ten (30%) 18-29 year-olds say they text on an *hourly* basis.

- In general, respondents who text indicate this is a popular way of communicating with a favorite station. Overall, 15% say they'd prefer to send texts *to* the station in order to vote, play a contest, or access title/artist information. Only one in ten (10%) would rather receive texts *from* the station, while four in ten (39%) say that either model is appealing. Right now, 13% say they already text with the station that sent them this survey, especially fans of Alternative and Rock/Active stations. The 18-34s are most apt to fall into this camp.

- The "Cell Phone Only" issue – originally identified in the first Jacobs Media Tech Poll in 2005 – continues to become more of a factor, particularly for Alternative radio, and stations that target 18-29 year-olds. Fortunately, both Arbitron, and now Nielsen, have enacted policies that include these "landline-less" consumers. In this new study, 29% now fall into this "Cell Phone Only" category – up from 27% last year, and 17% back in the '05 study. Half (48%) of Alterative fans are CPOs, as are nearly six in ten (59%) 18-29s.

- The iPhone (and iPod Touch) is becoming a major factor in the technology race to develop the optimal mobile device. In this '09 study, 12% of the total sample own an Apple iPhone (or Touch), up significantly from last year. Respondents from Alternative station email databases are especially likely to fall into this group. ..

  Additionally, 15% of non-iPhone owners say they are very or somewhat likely to purchase one of these devices in '09. Of current iPhone/Touch owners, more than half (5%) have downloaded paid apps.

Key Findings – Streaming Video

- Video streaming has become a major Internet activity among respondents. Overall, seven of ten (69%) say they frequently or occasionally download/stream video from sites like YouTube. While that level is similar to last year's, the difference is that "frequent" video streaming has jumped from 19% to 23%, and is especially prevalent among Alternative fans (39%) and younger consumers. Even 15% of Classic Rock fans watch streaming video often, another indicator that these more mature consumers are discovering new entertainment technologies at a fast pace.

- Of these video streamies, YouTube continues to be the most frequent destination (71%), but is actually down from its '08 levels. Video streaming usage has increased significantly on social networking sites like YouTube and MySpace, as well as on network television websites and Hulu. Interestingly, viewing frequency has also risen at the survey stations' sites, from 15% to 30% year to year. This is an indicator that radio stations are doing a better job of providing and promoting streaming video content, a recommendation that was made in this same analysis in last year's study.

Key Findings – Social Networking

- Another area experiencing significant growth is social networking. In ’08, 57% of respondents visited destinations such as Facebook and MySpace. In this new survey, two-thirds (67%) say they use and/or have profiles on these types of sites. And for the first time, activity is higher for Facebook (43%) than for MySpace (38%). Alternative fans are especially more apt to opt for Facebook.

- Not surprisingly, Alternative partisans and 18-34s are the most likely social networkers. In fact, more than eight in ten respondents from each of these subgroups visit and/or have profiles on some of the aforementioned sites. Women are also more likely to engage in this activity. While Classic Rockers are considerably less apt to socially network (with the exception of Classmates.com), it is of significance to note that well more than half (54%) participate, in one form or another, in this activity.

- Beyond Facebook and MySpace, other sites are mentioned with frequency. Overall, Classmates.com generates 16% of the activity from social networkers, with Classic Rockers emerging as somewhat more apt to be seeking out former school friends. LinkedIn attracts nearly one in ten (9%), especially Alternative fans. Additionally, 5% cite Reunion.com and Twitter. Overall, those who prefer the Alternative format or own iPhones are twice as apt to “tweet” than are fans of Classic or Active/Mainstream Rock.

- Among these listeners, daily visits on social networking sites have increased from 25% last year to 39% in this new survey. Notably, half of Alternative (50%) fans who use these sites visit them more than once a day, indicating how important Facebook and MySpace has become in their lives.

Key Findings – iPods & Podcasting

- Each year, we marvel at the growth of iPods (and similar devices), and finally, this trend appears to be slowing down. But, ownership of these gadgets has reached critical mass as more than six in ten (62%) now have one. Once again, the majority (61%) are made by Apple. Amazingly, more than eight in ten (81%) of Alternative listeners own one of these devices, and it is especially likely to be an Apple product. It is noteworthy that half (50%) of Classic Rock fans now claim ownership of these gadgets, another indicator that their technology use is on the rise.

- And it’s not over yet. While projected growth for iPod ownership among those who have managed to avoid this phenomenon is slowing, 6% say it’s very likely they’ll purchase one this year, while about one-fourth (25%) say it’s somewhat likely they’ll take the plunge in ‘09. (Part of the slowdown may be due to the fact that 12% of the sample say they now own an iPhone or an iPod Touch.)

- Similar to past studies, iPods impact radio listening. About one-fourth of those who own one say they listen to it exclusively or mostly for music (23%), especially Alternative fans and 18-34 year-olds. As the Walkman becomes more extinct, and the iPod becomes more universal, radio's portability continues to be challenged. And in-car iPod usage continues to be strong, as more than half of those who own one of these gadgets (54%) indicate they are able to connect them to the vehicle they drive most often. Not surprisingly, men, Alternative partisans, and 18-34s are more likely to take advantage of this feature.

- Three in ten (28%) respondents (whether they own an iPod or not) say they've downloaded/listened to a podcast, especially Alternative fans (48%). And of these respondents, seven in ten (72%) say they'd be very or somewhat willing to access a podcast that contains an introductory commercial from a sponsor. Once again, this signals a strong revenue opportunity for stations that feature popular podcasts.

- How do podcast consumers listen to this content? More than one-third (37%) say they listen to podcasts exclusively or mostly on their personal mp3 players (especially iPhone owners). Conversely, more than six in ten (63%) podcasters listen mostly or exclusively on a computer. This is especially true of older demos where three-fourths (73%) of 55 plussers use their computers mostly or exclusively for listening to podcasts.

Key Findings – Radio & New Music

- Identical to last year, 92% of the entire sample listen to local radio stations at least one hour a day.

- As we continue to see in these Tech Polls, listening to local radio stations at home is skewing lower. And similar to last year, four in ten (42%) say they never listen to the radio while walking around/working out. In this new study, radio has also lost some ground on the home front.

  Yet, while nearly a quarter (23%) don't listen while working, there are indications that on-the-job radio listening has increased. The big growth area for radio, once again, is on computers. While one-third (34%) don't listen to streaming radio on computers, three in ten (30%) say they are listening more on these devices. Of the various locations for local radio, in-vehicle usage remains the bastion for listening. Almost the entire sample says they tune in local radio while driving, and nearly one-third (32%) say their car radio listening has increased in the past year.

- Perceptually, there's a split decision as to whether commercial radio has improved in the last year. While one-fourth (23%) say it's better, a similarly sized group (24%) say it's gone downhill. Not surprisingly, Alternative partisans and satellite radio subscribers are most critical.

- When it comes to the survey stations, however, enthusiasm is holding its own. Using the Net Promoter system of gauging word-of-mouth, the average participating station in Tech Poll V earns a score of 39 (down from 41 in ’08, but up slightly from ‘07’s 38 score). This is respectable, but it is also important to note that in a similar study conducted for public radio stations this past fall, their NP scores ranged 30 points higher, indicating greater loyalty and satisfaction.

- The fortunes for new music are not nearly as positive. Similar to last year, only one-fifth (20%) feel the quality of new music released in the last year is better than usual, compared to three in ten (28%) who claim it’s gotten worse. There’s a negative skew across the various age groups, as well as men. Even among Alternative and Mainstream/Active Rock fans – formats that have always been new music-oriented – “worse” grades are about equal to those who feel that new music is “better.”

- As *the* source for exposure to new music, radio has hung onto its edge. Overall, more than half (56%) continue to name radio as their prime destination for new releases – almost identical to last year’s numbers. Friends/other people (11%) and “my kids” (6%) distantly trail, as do a host of online sites, television channels, iTunes, and satellite radio.

- In order to get more detail on this issue, respondents were asked to check off *all* their sources of music exposure. In this dimension, a whopping 85% point to FM radio, followed by friends (57%), movies and TV shows (both with 33%), music television channels (28%), and kids (23%). iTunes, social networking sites, YouTube, print sources, sites like Pandora, videogames, and satellite radio are all mentioned by fewer than one-fifth of the total sample.

- In a new question this year, eight in ten (81%) respondents say they’ve purchased recorded music in the past year. While Alternative partisans are especially likely to have paid money for music, more than three-fourths of Classic Rockers have as well. This debunks much of the beliefs held by record labels over the years about the value of this mature audience when it comes to music purchasing.

  Of these Tech Poll participants, nine in ten (90%) say they’ve bought music in the CD format, while more than half (54%) indicate they’ve downloaded digital music files from sites like iTunes and Amazon.com. Alternative fans and 18-39 year-olds are much more apt to have downloaded digital songs and/or albums. Nearly one in ten (8%) has bought music on vinyl – particularly Alternative devotees.

Key Findings – Website Priorities and Features

- The email club concept is rock-solid, continuing to nurture loyalty and connectivity with listeners. Overall, six of every ten (63%) say that being a member of the survey station’s email club generates a stronger bond with the station. These numbers are consistent across-the-board, and also very similar to past years’ polls with no respondents indicating that the email club has harmed the relationship – giving confidence that most stations aren't spamming their audiences.

- Blogging has become a very popular web activity. Four in ten (39%) say they read blogs, but don't comment on them, while one-fifth (18%) do both. And one in ten (10%) says they have their own blog. .

- Online shopping continues to emerge as a major online activity. Only one in ten (9%) says they never purchase products via the web. Overall, four in ten (44%) shop via the Internet at least monthly; 15% do so at least weekly. The most frequent shoppers are Alternative fans.

- Digital coupons set up by the survey station and its advertisers are very appealing to the vast majority of respondents. Overall, half concur that coupons emailed by the station are a great concept (50%), especially women and younger listeners. Nearly four in ten (37%) prefer to visit the station website in order to access and print online coupons. Thus, nearly nine in ten (87%) respondents love the idea of station discounted coupons, a finding that's not all that surprising, especially given their attitudes about the economy (below). This represents a great opportunity for radio to help financially strapped consumers find great deals, as well as generate traffic and business for advertisers.

- For the first time since we've been conducting these surveys, we asked respondents to rate the value of various web features in order to determine a hierarchy of importance for radio station websites. Working from a list of 21 different dimensions, the most popular features – mentioned by at least four in ten – are "now playing," day-long artist and title information, and concert and events/entertainment listings. A second tier of features, rated "love to see" by approximately three in ten, include streaming audio, downloadable coupons, and station schedule information.

  Below is the total list, accompanied by the percentage that voted "love to see" on the station website:

"Now playing" (artist + title)	49%
Concert listings	48%
Artist + title info for the entire day	41%
Events & entertainment listings	41%
Streaming audio of the station	33%
Downloadable coupons	31%
Schedule information	29%
Downloads of new music	25%
Listener polls	23%
Email club sign-up	22%

Studio webcam	19%
Music videos	19%
Archived morning/personality shows	19%
“Babe of the Day” features	17%
Purchase music	16%
DJ pictures & bios	15%
Artist bios & information	15%
Podcasts of archived shows	13%
Online station store	12%
DJ blogs	10%
Chat boards about music, etc.	9%

Key Findings – Satellite Radio

- Satellite radio subscribership has inched up from 12% to 13% in the year of the companies' merger to Sirius XM. Overall, customer satisfaction continues to decrease. Since our 2005 study, subscribers who say they're “very satisfied” with either of the existing satellite radio services has fallen from 44% to 36% in this new study. And the absolute commitment to continue with Sirius XM is dropping. Last year, 56% of subscribers said they would “absolutely continue” with satellite radio, but this year, that commitment is down to just 51%.

- What are satellite radio's negatives? While one-fourth (27%) of subscribers have no issues, the top complaint revolves around too many channels that are of no interest, followed closely by hearing commercials on some of the channels. Others complain about audio quality, the elimination of channels because of the merger, and the difficulty of navigating through so many channels.

Key Findings – HD Radio

- While there's been considerable upward movement with various gadgets and technologies during the past year, growth has been slow for HD Radio. Moving from about 1% to 2% ownership since last year, consumers are still very wary about purchasing an HD Radio. In an environment where the iPhone – a new product – far outpaces HD Radio, it illustrates the challenge being faced by this technology.

- Familiarity with HD Radio continues to improve. This year, more than half (59%) say they know about it (or own one) – up from 49% in '08. As has been the case in past surveys, men, Alternative partisans, and younger listeners report more awareness of HD Radio.

- Over the last three years, we “tested” the knowledge levels of those familiar with HD Radio, ensuring their accuracy using “True/False” questions. Overall, they tend to be correct about various aspects of this technology 70% of the time – up considerably from the '08 study.

- Satisfaction with HD radio among owners is good, but not great. Overall 37% report being satisfied, while three in ten (30%) are very satisfied. Conversely, about one-fifth (22%) are neutral about their HD radio, while one in ten (11%) expresses some level of dissatisfaction with the product.

- After providing a brief description about HD Radio, and inquiring about a $100-$200 price point, one in ten (11%) reports they would be very likely to purchase a radio, while one-third (32%) indicate they'd be somewhat likely. These intent to purchase levels are virtually unchanged over the past three years.

- The barriers to purchasing an HD radio are very similar to the findings from the '07 and '08 surveys. Four in ten (39%) say they simply don't know enough about it. Additionally, one-third (32%) say they don't want to install an HD radio in a vehicle for aesthetic and/or cost reasons, while three in ten (29%) complain that the radios are too pricey. But two other impediments have to do with a lack of exposure to HD Radio. Nearly three in ten (27%) say they've never heard HD Radio, while one-fourth (24%) say they don't know anyone who owns one.

Key Findings – Gaming

- About half (46%) say they play videogames at least once a week, similar to last year's levels. As has been the case in the past, 18-34 year-olds, Mainstream/Active Rockers, and men play videogames with the most regularity. But gaming shows popularity among women and older listeners, too. Four in ten (39%) Classic Rockers are also weekly gamers.

- The big change in gaming systems is focused on the Nintendo Wii. Last year, 16% owned the Wii, while in this new survey, more than a third (34%) are working out and playing tennis, golf, and other games on this growing Nintendo hit. While Sony's PS2 remains the leader (40%), its ownership level is falling. Notably, only one-fifth (20%) of all respondents do not own a videogame system of any kind.

- Similar to last year's findings, there are continuing signs that gaming is a social activity. While half (50%) say they play solo (especially the 55+ crowd), more than a third (34%) play with others in person, while one in ten (11%) interacts with fellow gamers online. Alternative fans, women, and 18-29s are more apt to enjoy videogames with other players in the same room.

- Games like "Guitar Hero" and "Rock Band" have made a huge impact, and continue to increase their footprint. Now more than half of gamers (53%) have played either music-based game in the past year. Both men and women play these games, with the strongest participation coming from fans of Alternative, Active/Mainstream Rock, and 18-34 year-olds. And as we learned last year, about one-third (32%) of these gamers say they've purchased music that they've heard featured in "Rock Band" and "Guitar Hero."

- In a different type of game, one-fifth (21%) say they've participated in a fantasy league during the past year, especially men.

Key Findings – Newspaper Readership

- In the first survey in which we've included questions about newspapers, we find that only six in ten (57%) say they read a daily newspaper (printed or online) on a regular basis – at least 3-4 days per week. Steady readership is highest among Classic Rockers, and those in the 55+ group. Conversely, 18-34 year-olds are considerably less likely to consistently check out a daily newspaper.

- Of the regular readers, about half (51%) mostly or exclusively stick to the print edition. These old school newspaper consumers are mostly Classic Rockers and respondents 55 years of age and older. On the other hand, about one-third (34%) mostly or solely skew toward online consumption of the paper. They are likeliest to be Alternative fans and 18-34s.

Key Findings – The Economy

Last year, we devoted questions to the election (which correctly predicted the eventual outcome more than seven months prior to November 4th). This year, we focused on the economy.

- Respondents are extremely concerned about the economic state of both the U.S. and the world, and how it affects them and their families. Overall, nearly six in ten (59%) express the highest level of worry about the economy, especially Classic Rockers and 40+ participants. Additionally, one-third (32%) say they are somewhat worried about economic conditions. Thus, nine in ten (91%) express worry and concern about America and the world's financial states, while less than 5% say they feel good about how things are progressing economically.

- Yet, there is considerable optimism about President Obama's potential to positively impact the economy. Overall, one-fifth (21%) are very upbeat about the President's chances, especially Alternative fans, Democrats, and women. Additionally, nearly one-third (32%) say they are simply "optimistic" about "the Obama effect." On the other hand, about one-fourth (25%) are "pessimistic" or "very pessimistic" about President Obama's ability to pull off the economic fix. Republicans, not surprisingly, are especially downbeat about his chances. Independents take a more neutral approach, but lean towards optimism about the President's chances to improve America's economic straits. .

Key Findings – Miscellaneous

Here are some odds and ends findings from Tech Poll V:

- As was the case last year, Alternative fans are most likely to have graduated from college and hold post-graduate degrees. Overall, four in ten (39%) have a four-year degree or better, versus the overall survey average of 29%.

- Classic Rockers are most likely to be married. More than six in ten (63%) are married for the first time or have remarried. Conversely, Alternative partisans are the most apt to be single (48%), compared to the overall survey average of 58%.

- While Active and Classic Rock fans skew heavily male in this survey, the Alternative composition is nearly evenly split male/female.

- Alternative is the most ethnically diverse format of the three. Only eight in ten classify themselves as white.

- National Public Radio's impact on Rock listeners is significant, and has grown in this 2009 survey. More than one-third (35%) listen to public radio at least weekly. This finding is consistent with national gains in public radio listening, which some analysts attribute to the Presidential election and subsequent news cycle concerning the economy. Public radio listenership in the Tech Poll is generally consistent across the various subgroups, but will vary by market. This data point is worth checking in the local station breakouts.

We hope you take the time to study the findings, as well as some of the breakouts that we've provided. We thank you once again for your participation, and we look forward to Tech Poll VI in early '10.