



How Experiences of 2020 Impacted Media Outreach and Messaging

July 21, 2021

MAJOR TIME SPENT WITH MEDIA GROWTH IN PANDEMIC

Average Time Spent HRS:MINS Per Day Among Total Ages 18+



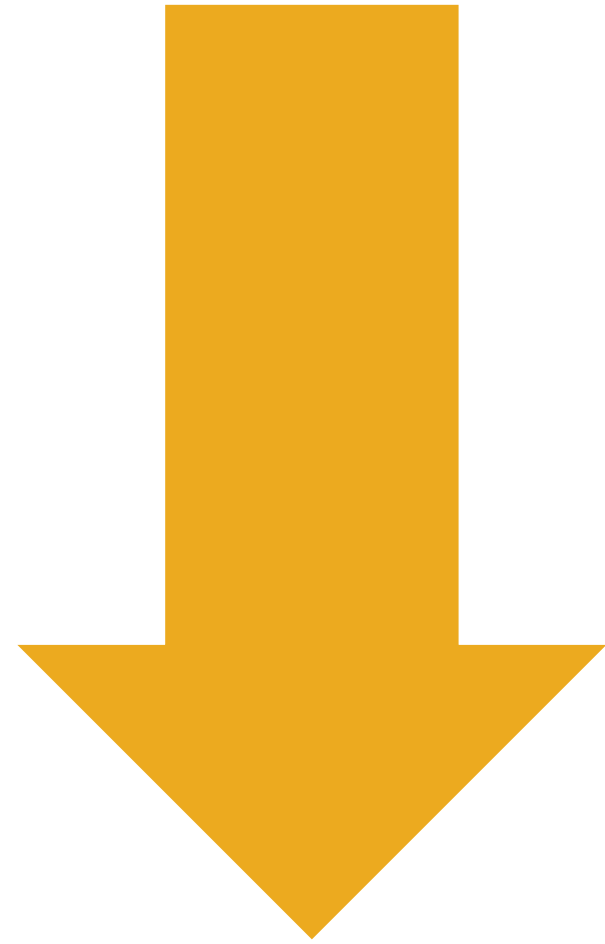
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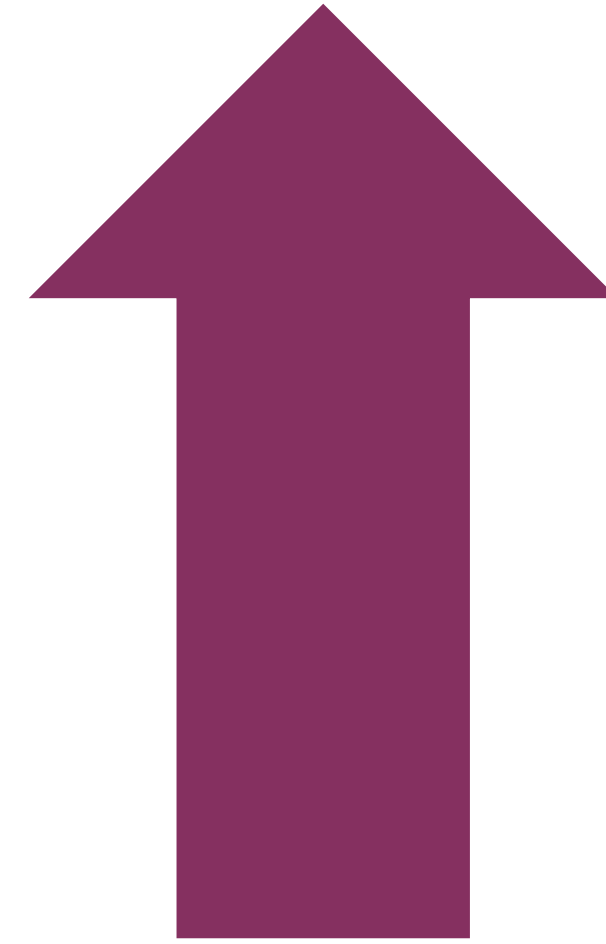
VIDEO

CONTENT IS KING



13% FEWER

NEW EPISODES ON TRADITIONAL TV



75% INCREASE

IN PROGRAMMING REPEATS ON TRADITIONAL TV

N + 37M

SUBSCRIBERS LAST YEAR

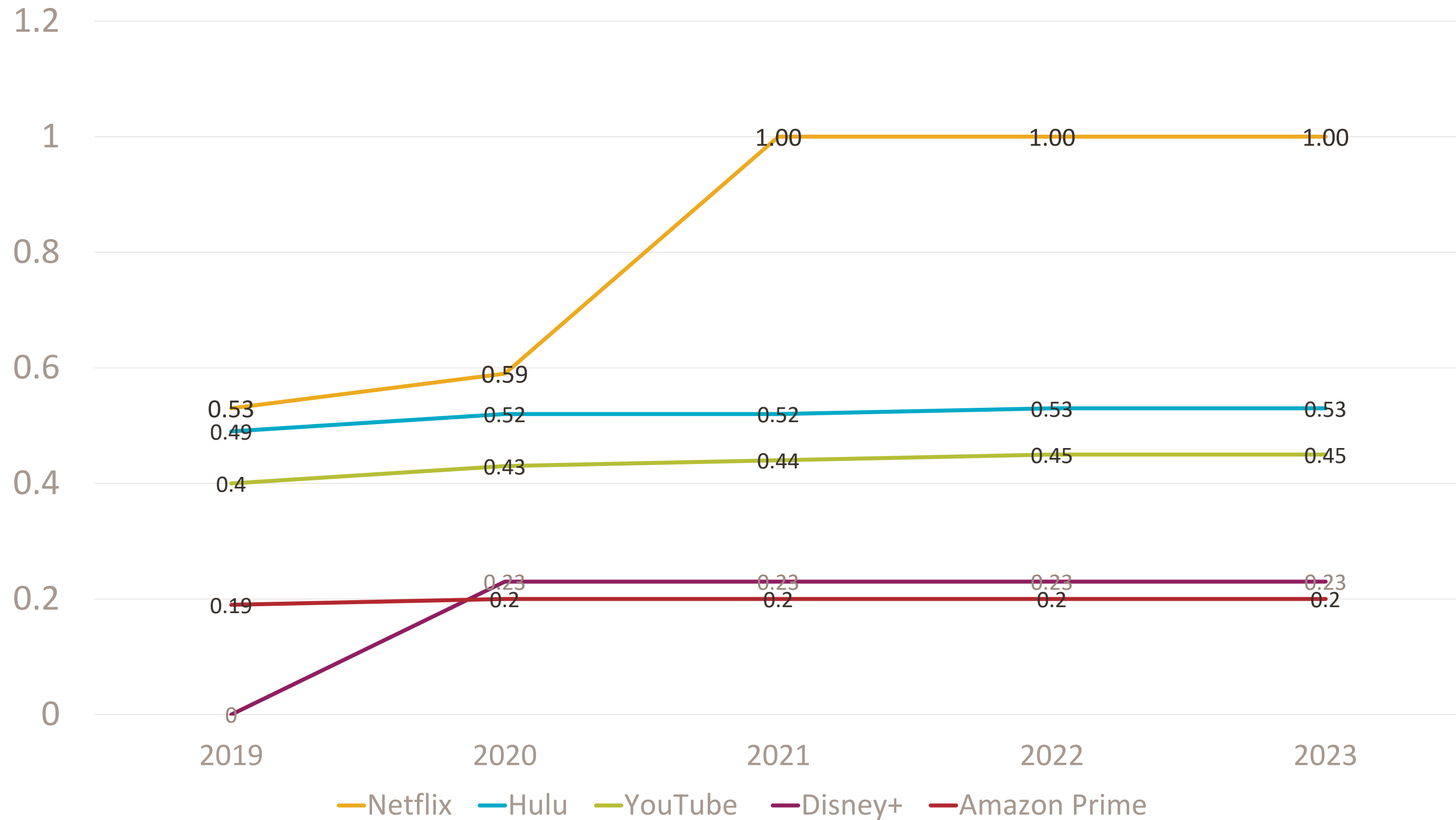
Disney+ 86M

SUBSCRIBERS SINCE LAUNCH



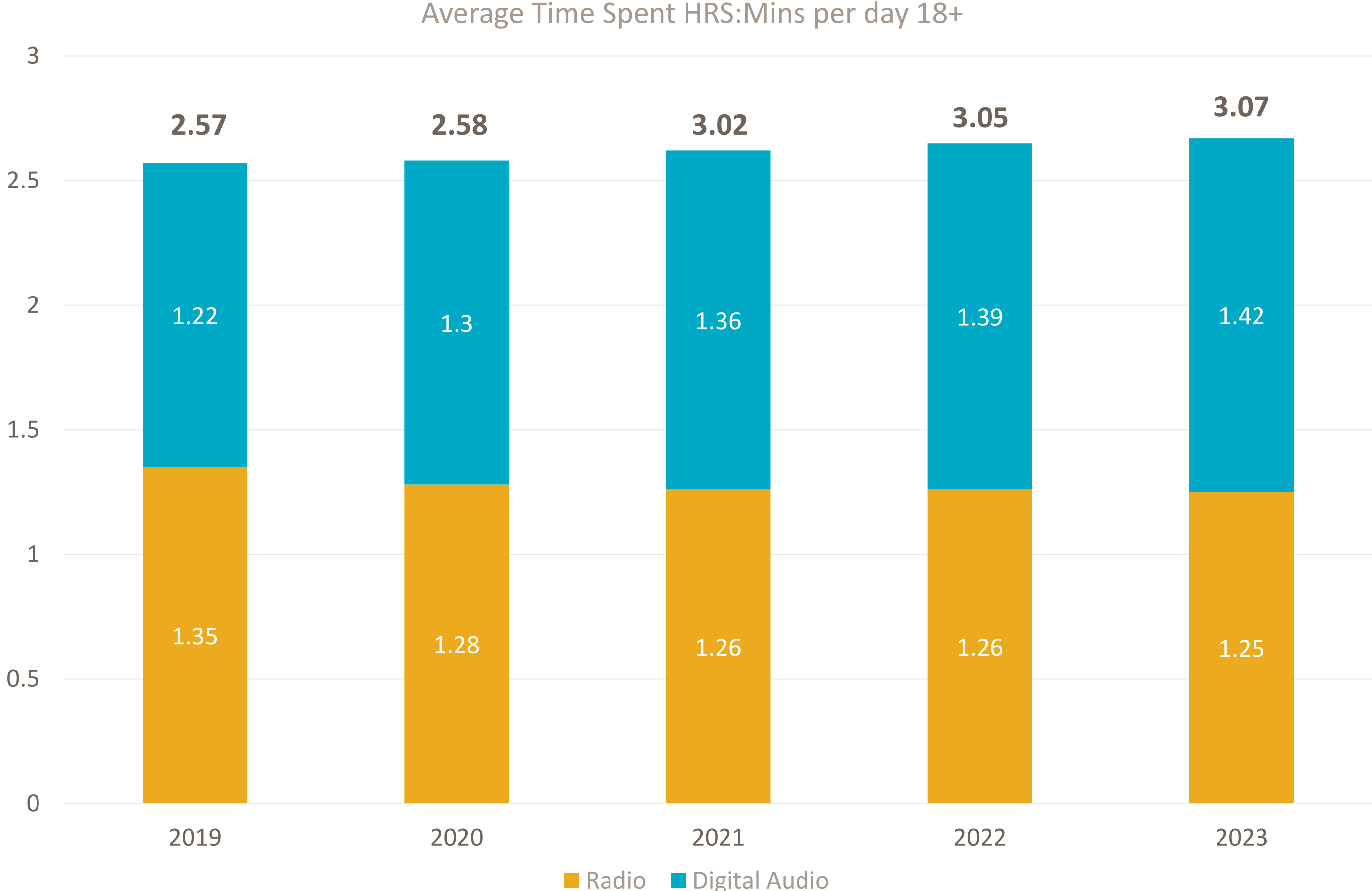
MANY OTT SUBSCRIPTIONS IN USE

Average Time Spent with Select Subscription OTT Video Services



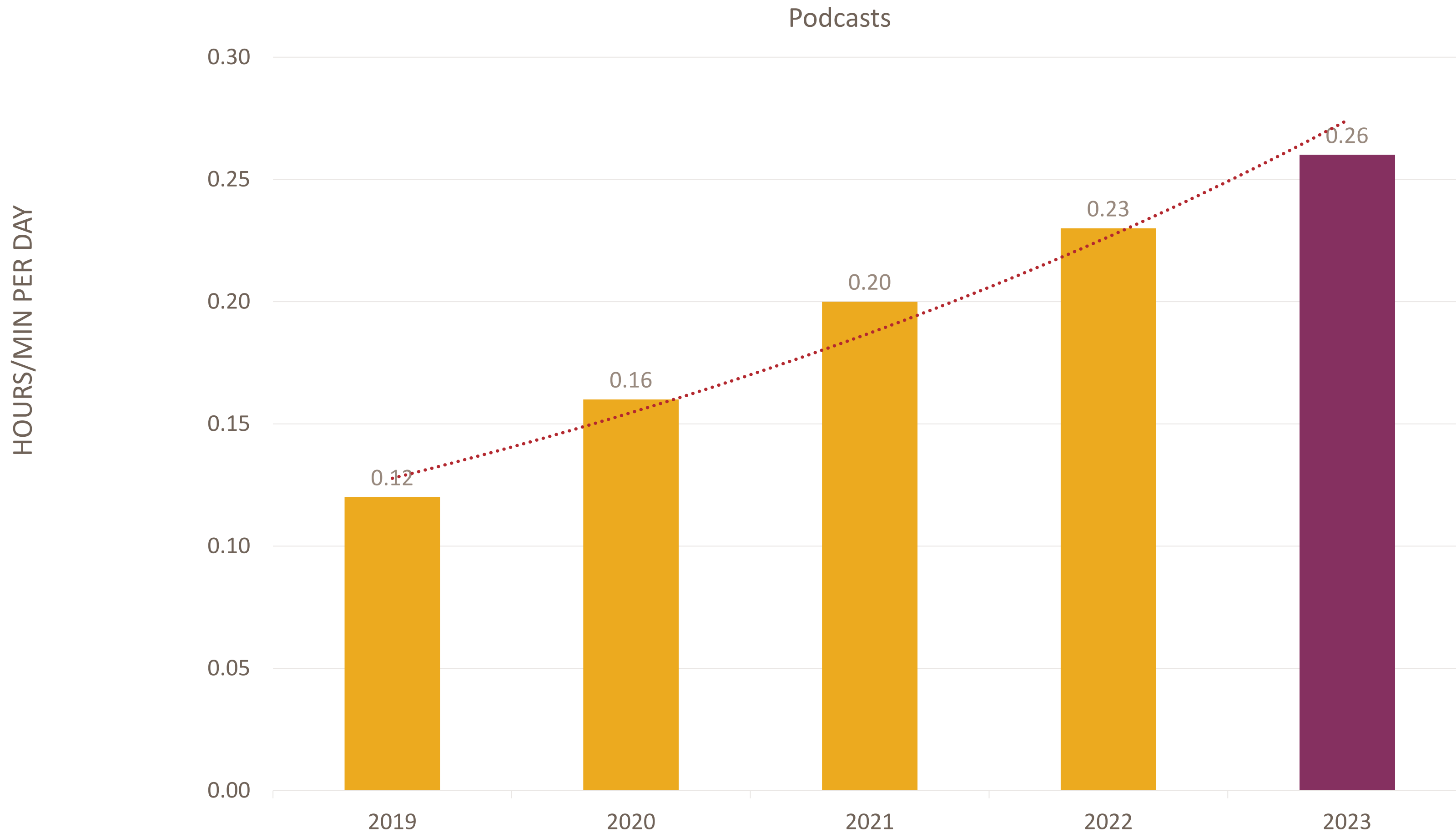
AUDIO

DIGITAL AUDIO VS TRADITIONAL RADIO



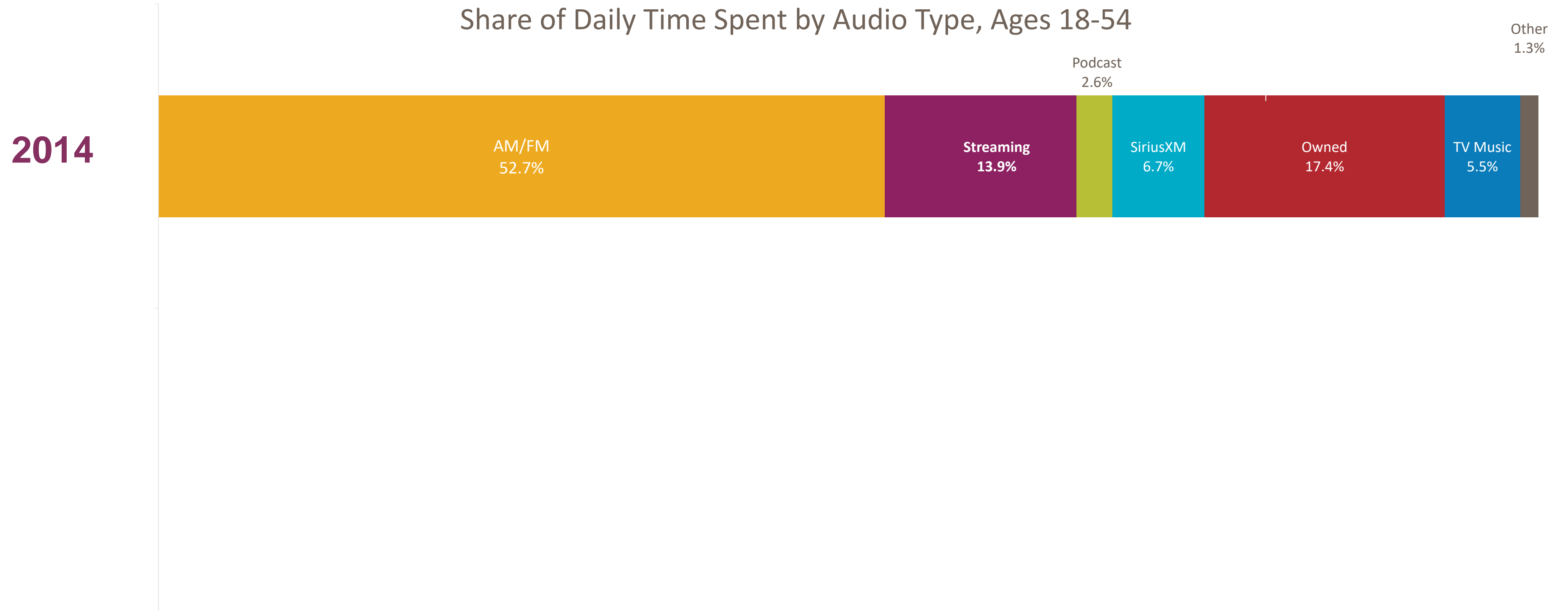
Source: EMARKETER MAY 2021

PODCASTS GROWING



Source: EMARKETER MAY 2021

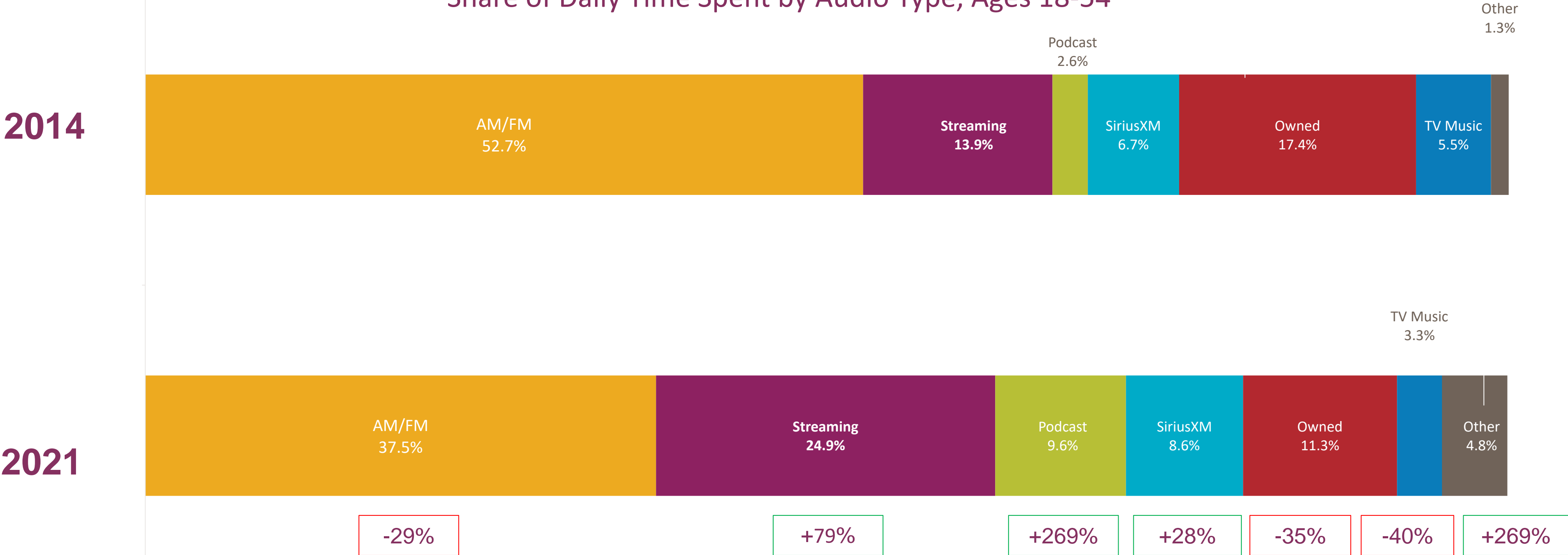
AM/FM STILL LEADS THE LISTENING SPECTRUM



Source: Edison Research Share of Ear Study, Q1 2021.

AM/FM STILL LEADS THE LISTENING SPECTRUM

Share of Daily Time Spent by Audio Type, Ages 18-54



Source: Edison Research Share of Ear Study, Q1 2021.

TRADITIONAL RADIO TRENDS TO OLDER AUDIENCE

50%

**OF AM / FM LISTENING HOURS ARE BY
PEOPLE AGE 48+**



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AM / FM
MEDIAN AGE

48



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AM / FM
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STREAMING
MEDIAN AGE

33



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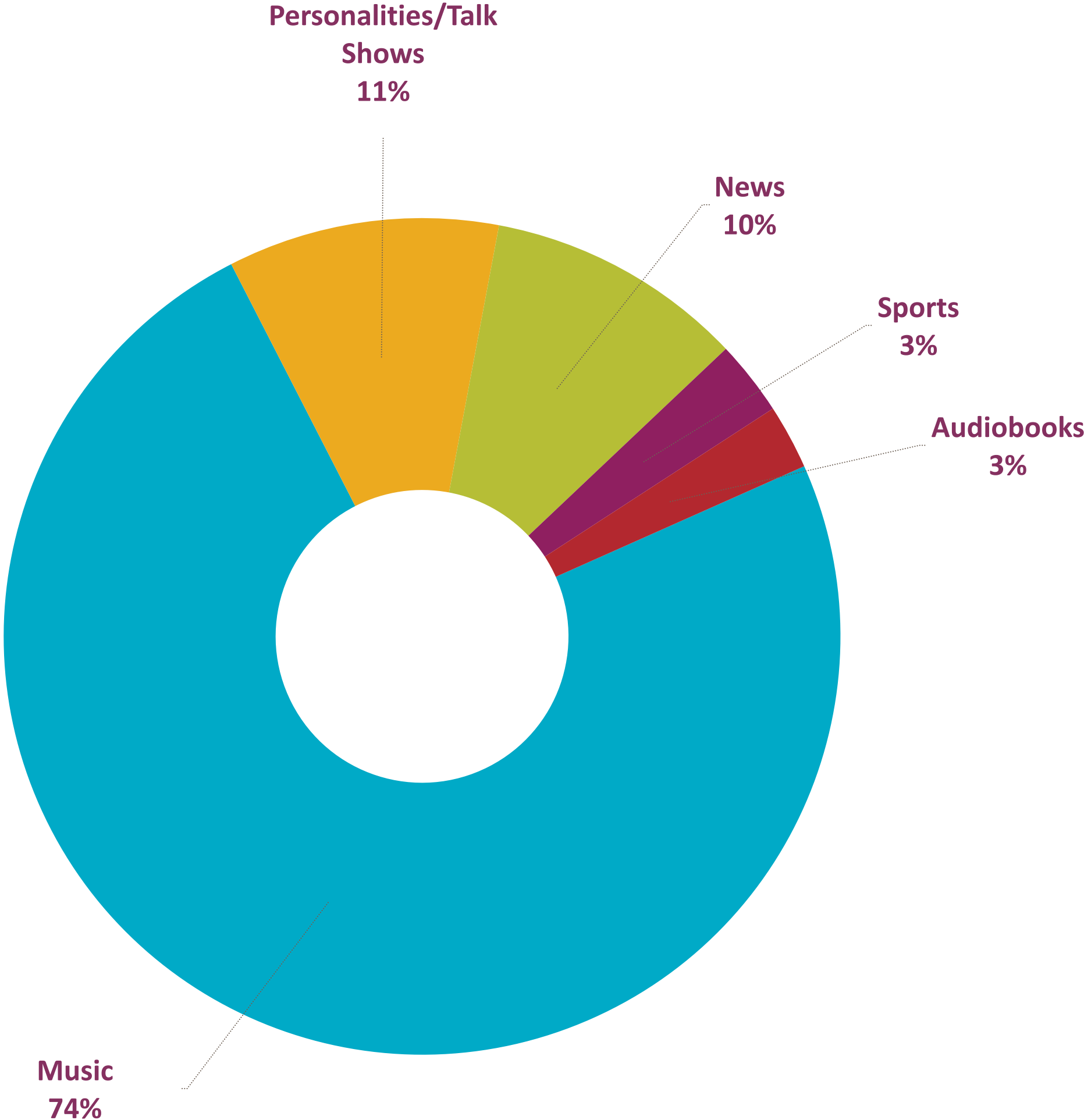
34



MUSIC IS STILL ON TOP

SHARE OF DAILY TIME SPENT LISTENING BY CONTENT TYPE

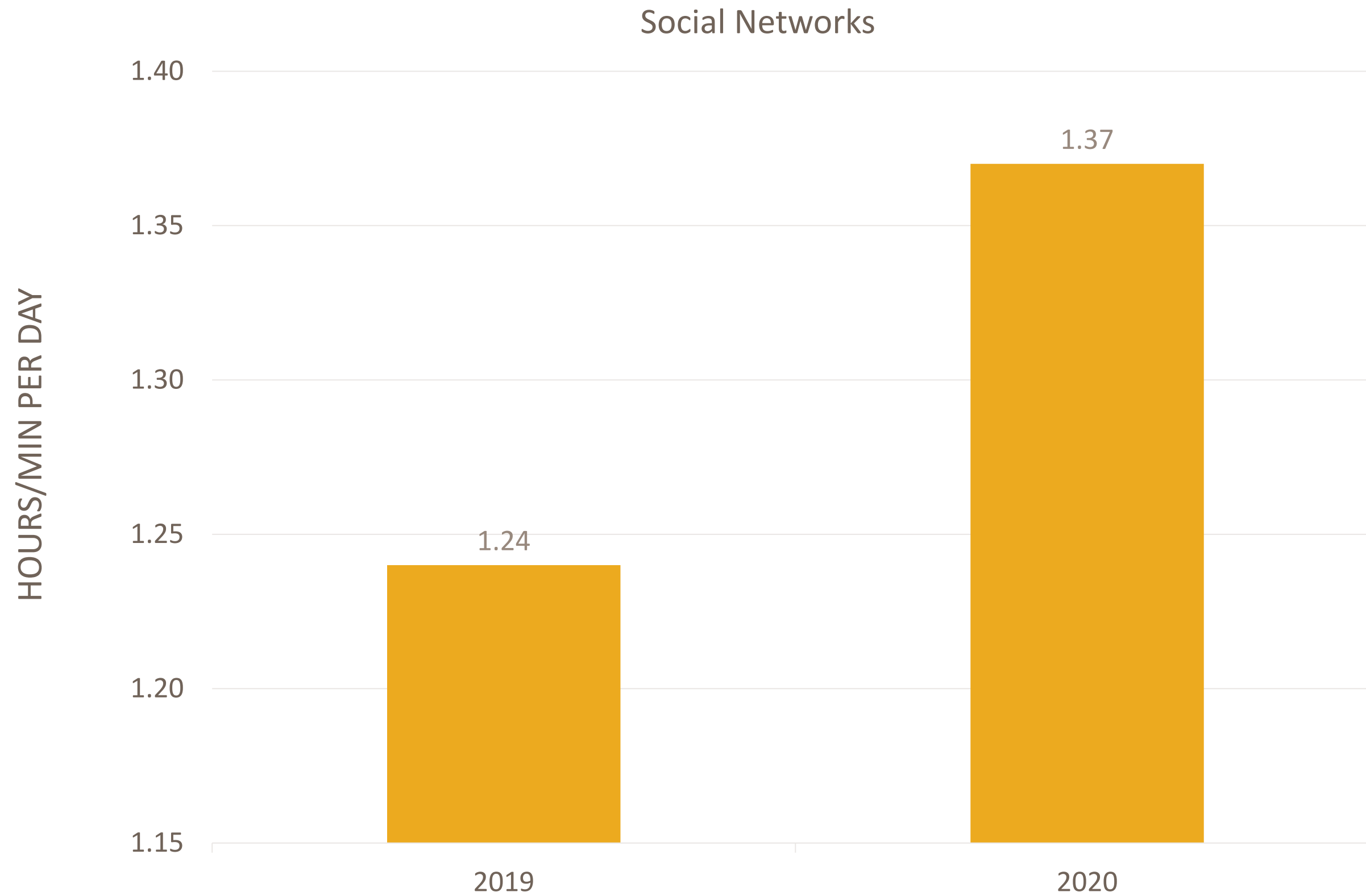
PERSONS 13+



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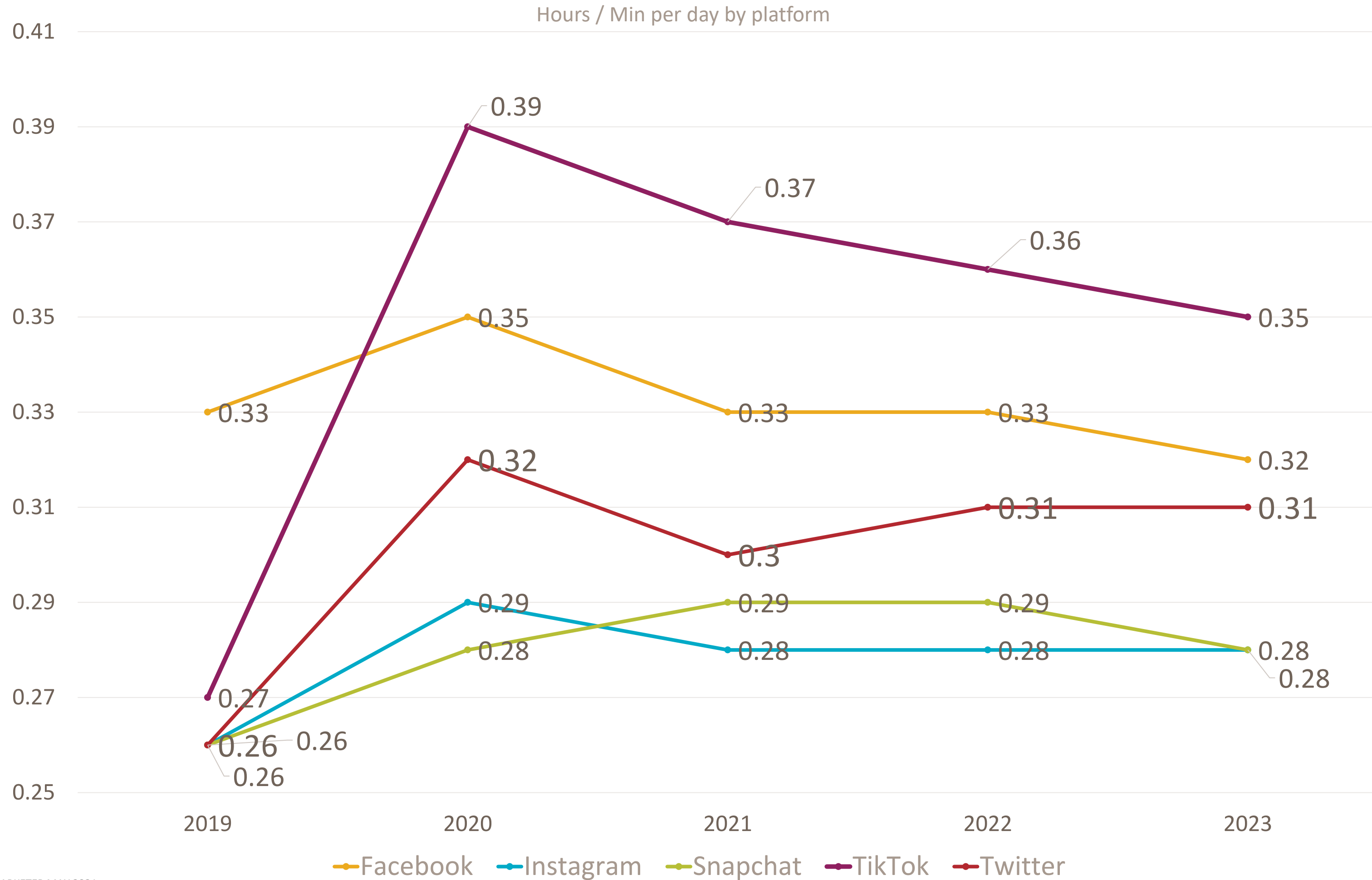
SOCIAL MEDIA

SOCIAL NETWORKS 2020 BIG GAINS



10%
Increase in
time spent

Tik Tok BURSTS ONTO THE SCENE



Source: EMARKETER MAY 2021

**WHAT DOES IT
ALL MEAN?**

TOP TAKEAWAYS

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THANK YOU

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