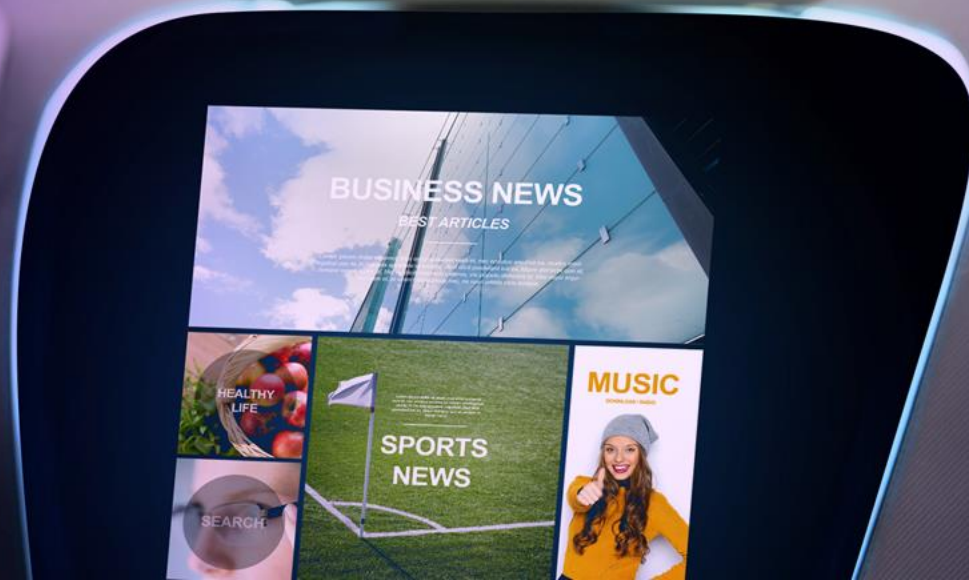




# Has Video Really Killed the Radio Star?: The State of Personal Media on the Move

Mark Loughney  
David Tice  
Hub Entertainment Research



**AUDIENCE**  
x**SCIENCE** 2023

hub**10** YEARS  
ENTERTAINMENT RESEARCH

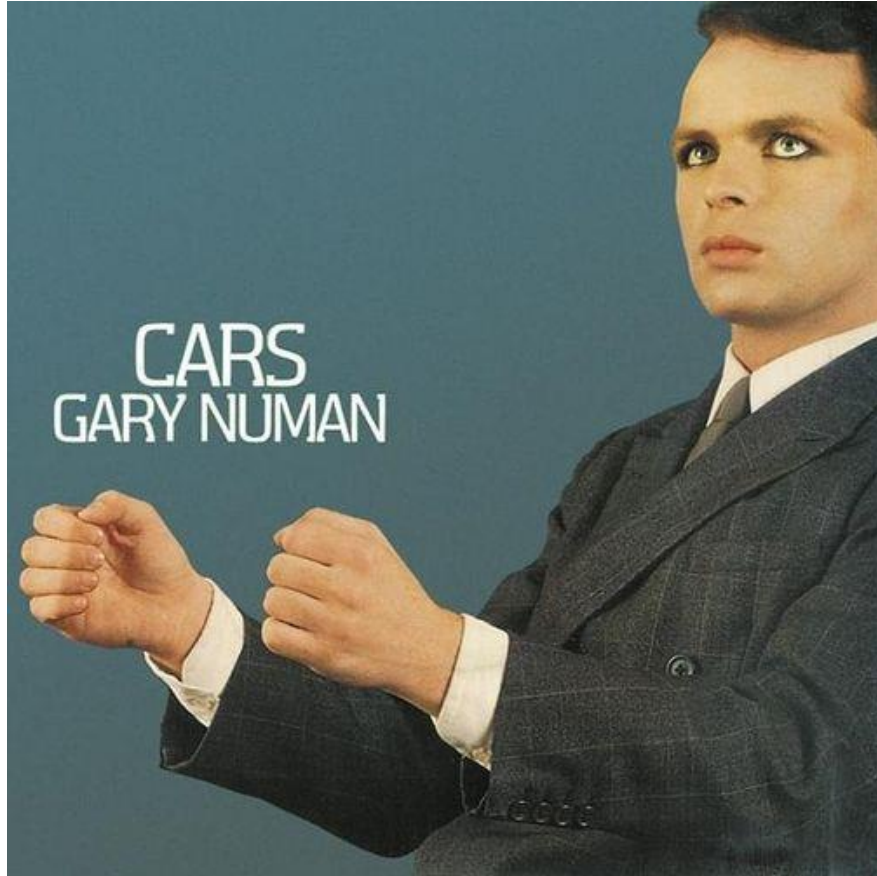
The digital media revolution has been well documented. But most research deals with media use in static locations – the home, the office, or other place.

How has the digital media revolution played out inside Americans' modes of transport – the all-important car, as well as buses, trains, and airplanes?



## AHEAD OF HIS TIME...

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Here in my car  
I can only receive  
I can listen to you  
It keeps me stable for days in cars

- Gary Numan, "Cars" 1979

# WE CONDUCTED AN ONLINE SURVEY OF 2,566 U.S. CONSUMERS

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- Age 16-74
- No screening exclusions: the sample includes both TV and non-TV homes, pay TV subs and non-subs, etc.
- Weighted to U.S. census data, including age, gender, ethnicity, income, HH size
- Data collection completed from mid/late November 2022
- All interviews conducted in English



A photograph of a young child with curly hair sitting in a car seat, wearing large headphones and singing with their mouth open. The image is overlaid with a semi-transparent red filter. The child is wearing a denim jacket. The background shows the interior of a car and a blurred figure of an adult in the driver's seat.

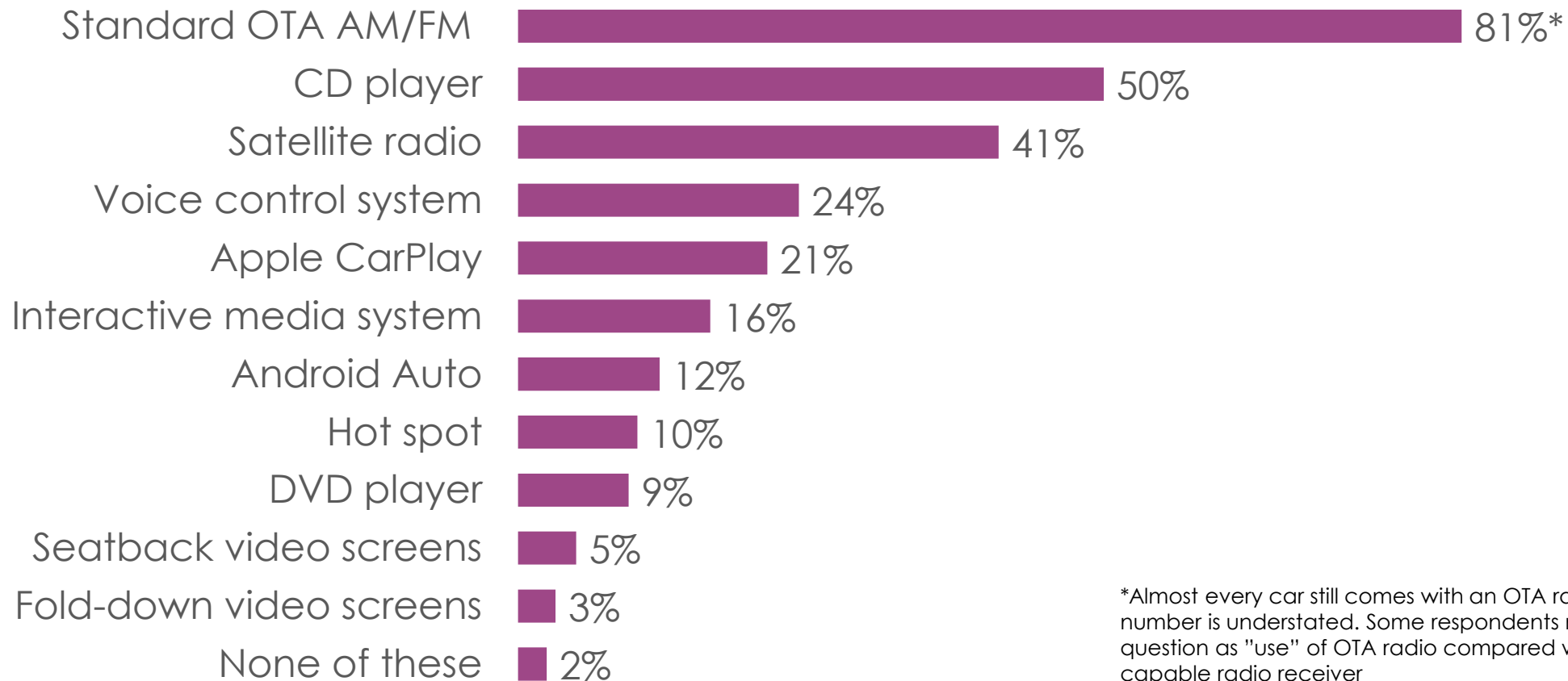
1

# MEDIA USED WHILE DRIVING

# OVER-THE-AIR RADIOS ARE STILL THE MOST COMMON BUILT-IN MEDIA OPTION, FOLLOWED BY CD PLAYERS AND SATELLITE RADIO



Media options built into primary vehicle  
- Car/SUV/minivan/pick-up drivers -

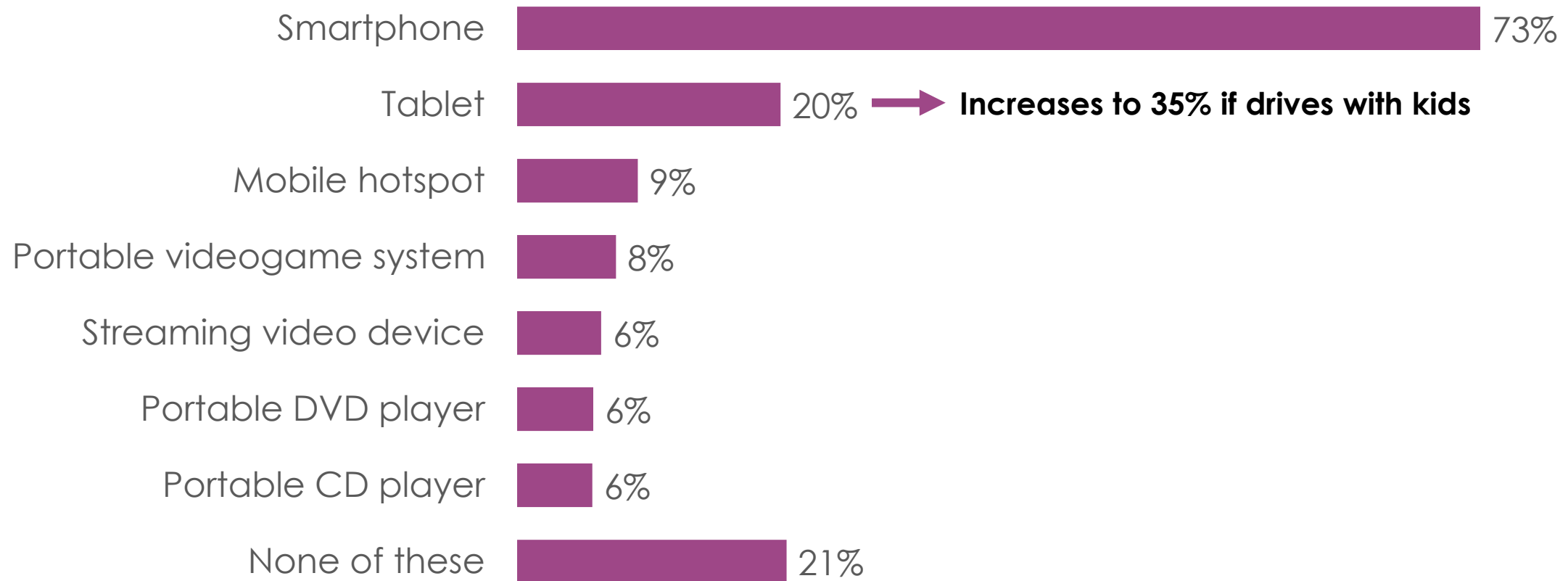


\*Almost every car still comes with an OTA radio as standard, so this number is understated. Some respondents may have misinterpreted the question as "use" of OTA radio compared with just "have" an OTA-capable radio receiver

# SMARTPHONES ARE THE MOST-USED PORTABLE MEDIA DEVICE IN PERSONAL VEHICLES. ALL ARE MORE PRESENT IN CARS WITH KIDS BUT TABLET PRESENCE ALMOST DOUBLES



Portable devices used in primary vehicle  
- Car/SUV/minivan/pick-up drivers -



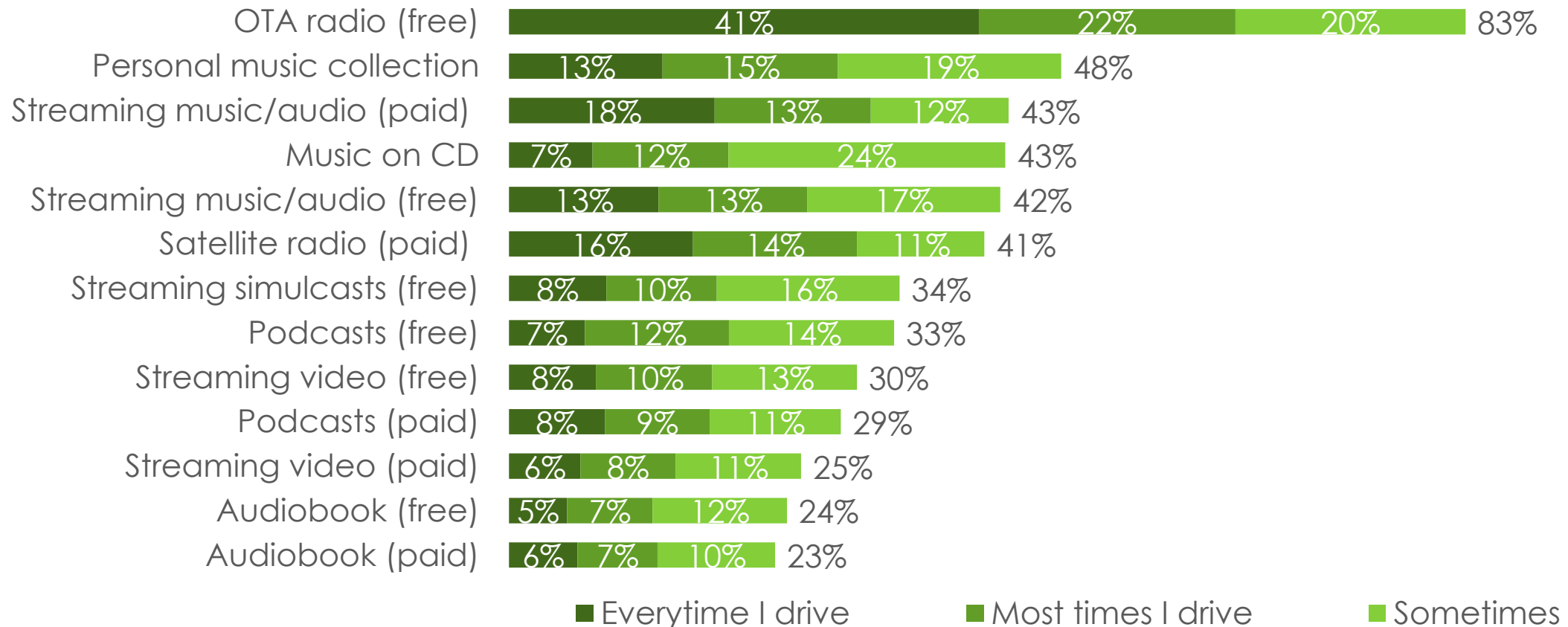
BASE: CAR/SUV/MINIVAN/PICK-UP DRIVER (n=2,198)

Q17. Some drivers and passengers use portable devices while in their vehicle. Are any of the following devices used by yourself or your passengers when you are driving the <brand from Q10> you drive most often?

# FREE OTA RADIO IS BY FAR STILL THE MOST FREQUENTLY USED MEDIUM WHILE DRIVING; MUSIC IS THE PRIMARY CONTENT, REGARDLESS OF SOURCE



Frequency of listening to **content sources** while driving  
 - Use any media tech while driving primary vehicle -

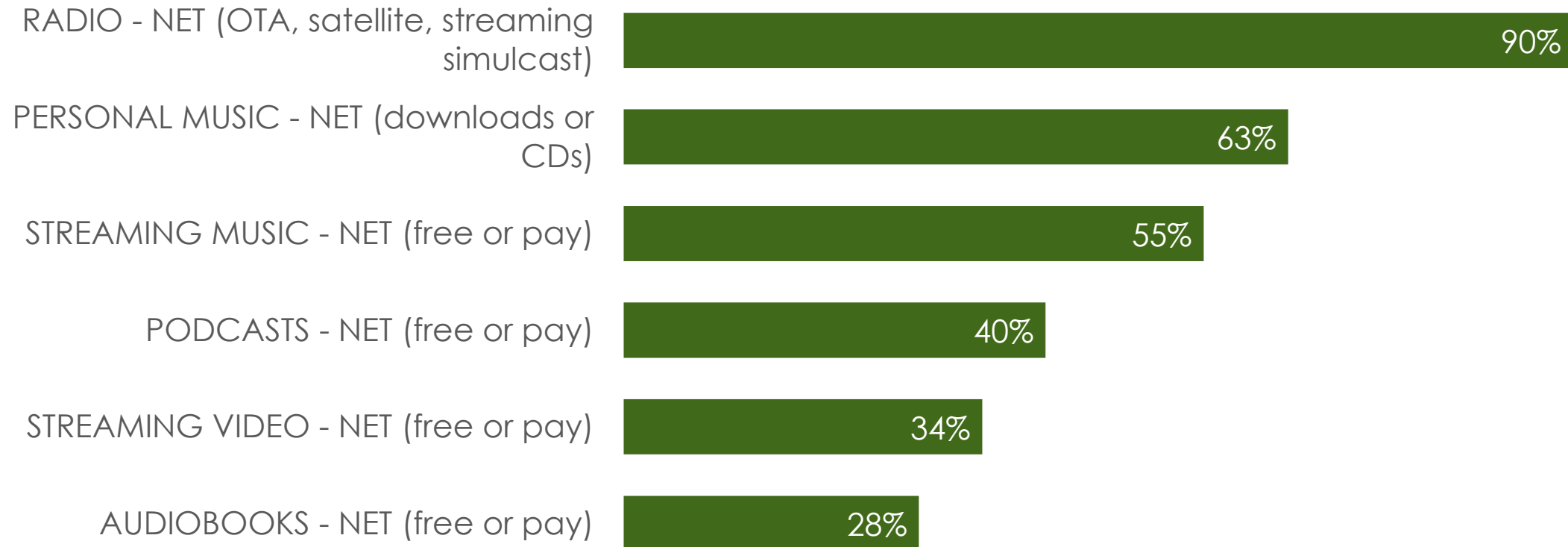


BASE: USE ANY MEDIA TECH WHILE DRIVING (n=2,152)  
 Q20. How often do you listen to each these content sources while driving the <brand from Q10>?

# ON A NET BASIS, RADIO IS THE MOST COMMON “EVER USE” MEDIUM, FOLLOWED BY PERSONAL MUSIC COLLECTIONS AND STREAMING MUSIC SERVICES



“Ever use” **content sources** while driving  
- Car/SUV/minivan/pick-up drivers -



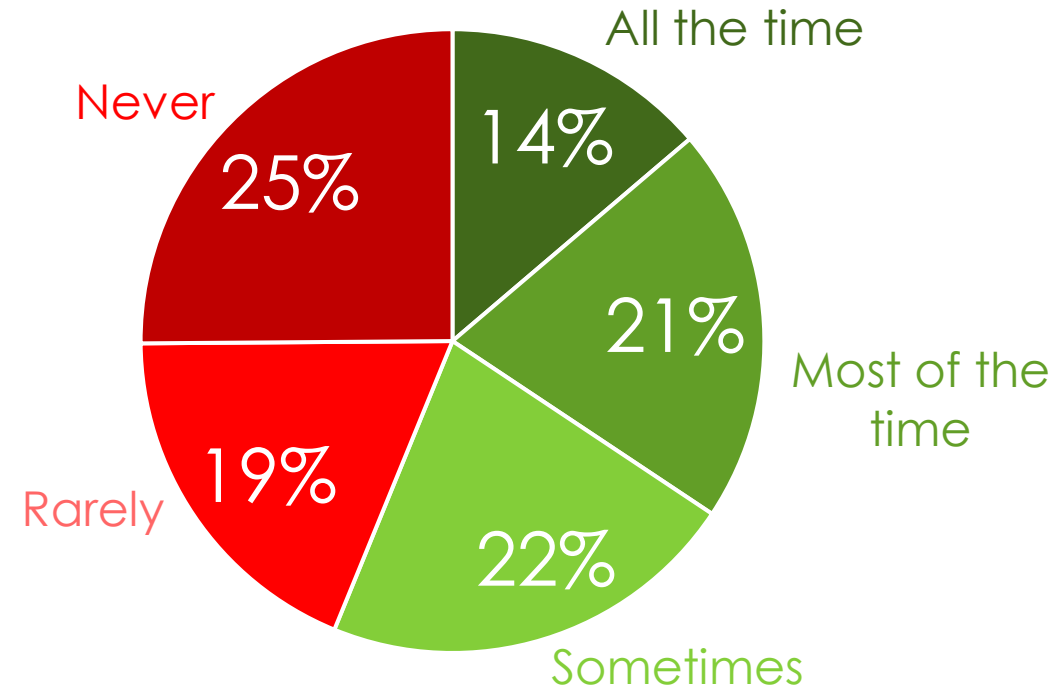
# 1 IN 3 (34%) DRIVERS CLAIM THEIR PASSENGERS USE A DIFFERENT SOURCE OF ENTERTAINMENT “ALL” OR “MOST” OF THE TIME – THIS INCREASES TO 50% FOR PEOPLE WHO DRIVE WITH KIDS



Frequency of **passenger usage** of different media/entertainment sources while driving

All who drive with others

- Use any media tech and drives with others -



BASE: USE ANY MEDIA TECH AND DRIVES WITH OTHERS (n=1,573)

BASE: USE ANY MEDIA TECH AND DRIVES WITH KIDS <18 (n=1,573)

Q25z. When you are driving the <brand from Q10> you drive most often, about how often do your passengers use a different source of media/entertainment?

A background image showing a group of people, likely commuters, sitting on public transit. The image is heavily overlaid with a solid orange color. In the foreground, a woman is wearing large orange headphones and looking down at a tablet. Next to her, a man is also looking at a device. Other passengers are visible in the background, some looking at their phones. The overall scene suggests a busy, modern transit environment.

# 2

## MASS TRANSIT

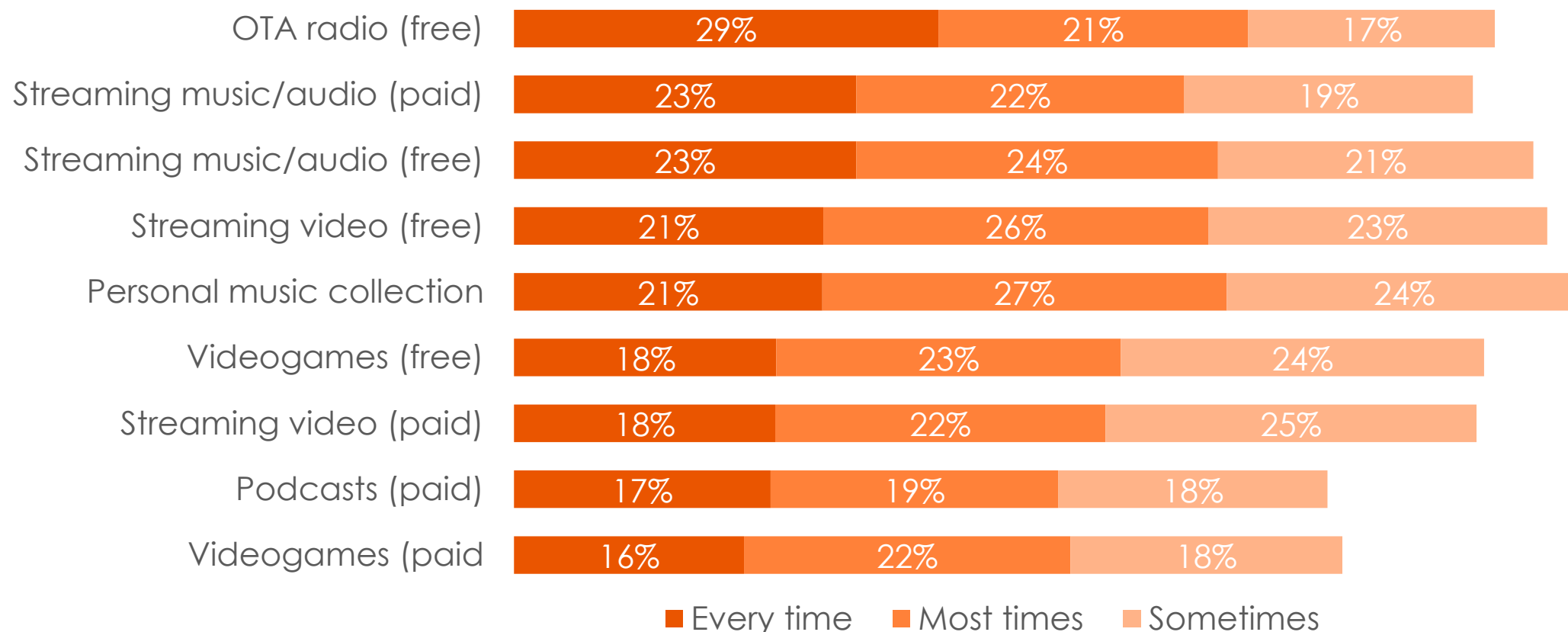
(TRAINS, SUBWAYS, TAXIS/RIDESHARES, FERRIES, TRAMS)

# USERS OF MASS TRANSIT USE MANY DIFFERENT TYPES OF MEDIA, WITH OTA FREE RADIO RANKED #1 FOR “EVERY TIME” USE



Frequency of listening, watching or reading **content sources** while using mass transit (Top 9)

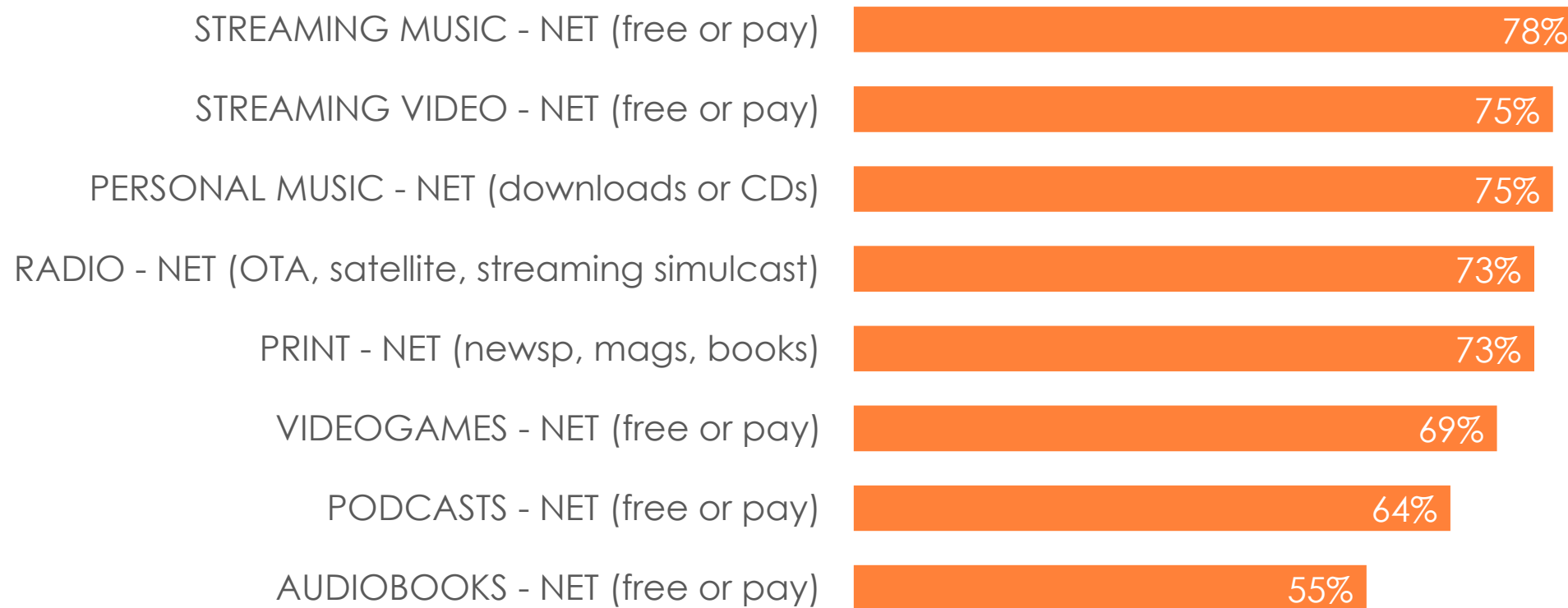
- Use mass transit -



# STREAMING MUSIC SERVICES ARE THE MOST COMMON “EVER USE” MEDIUM ON MASS TRANSIT, FOLLOWED CLOSELY BY STREAMING VIDEO, PERSONAL MUSIC, RADIO, & PRINT



“Ever use” **content sources** while on mass transit  
- Uses mass transit -





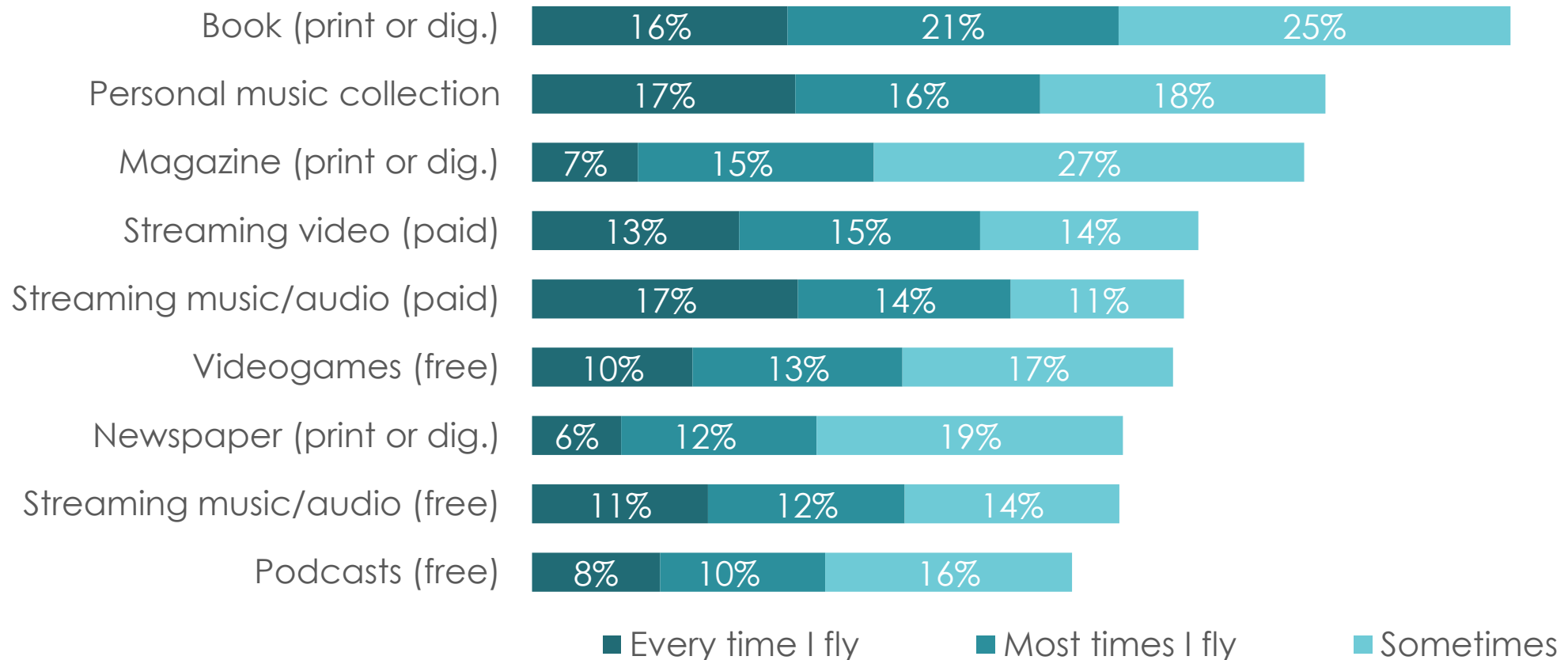
3

PLANES AND HOTELS

# WHEN FLYING, BOOKS & PERSONAL MUSIC ARE THE MEDIA USED MOST OFTEN. MAGAZINES ARE ABOUT AVERAGE IN “EVERY TIME” USE, BUT HALF SAY THEY USE THEM AT LEAST SOMETIMES



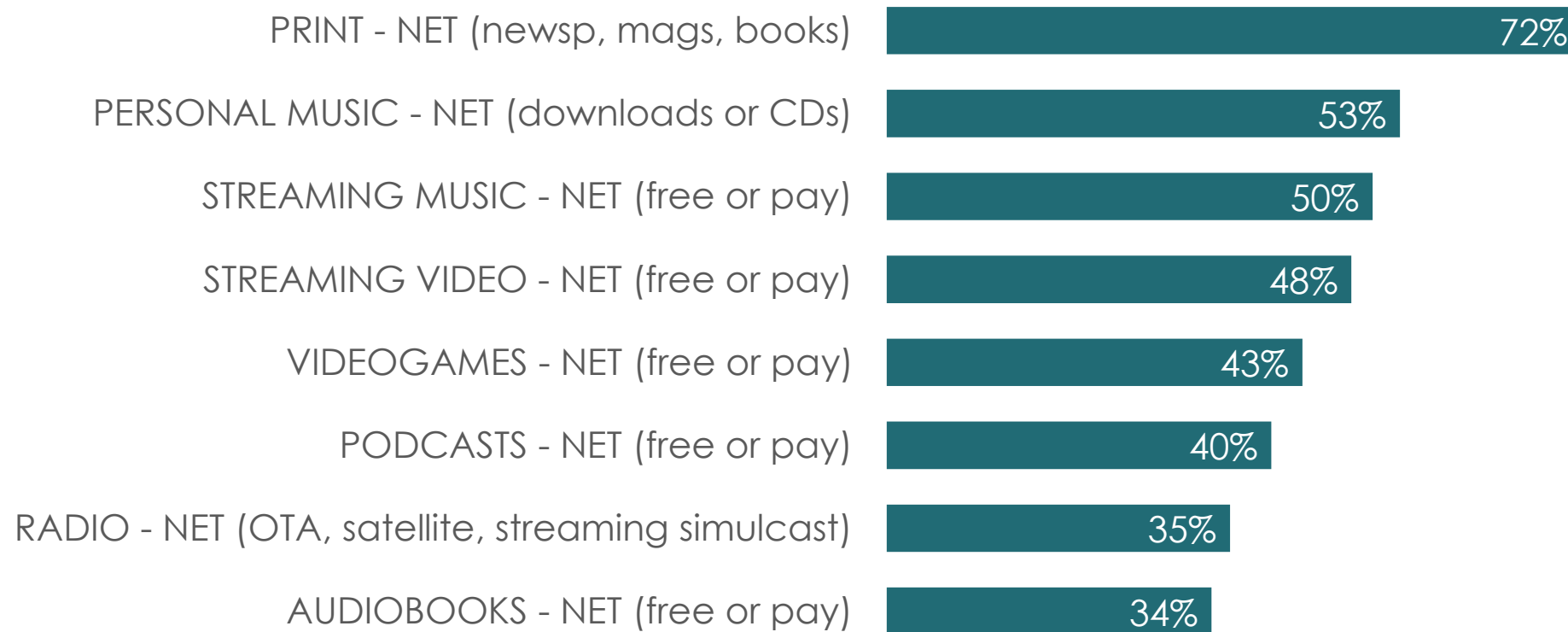
Frequency of listening, watching or reading **content sources** while flying (Top 9)  
- Airline traveler -



# PRINT IS THE MOST COMMON “EVER USE” MEDIUM ON AIRLINERS, FOLLOWED CLOSELY BY PERSONAL MUSIC AND STREAMING MUSIC SERVICES



“Ever use” **content sources** while on an airliner  
- Airline traveler in 2022 -



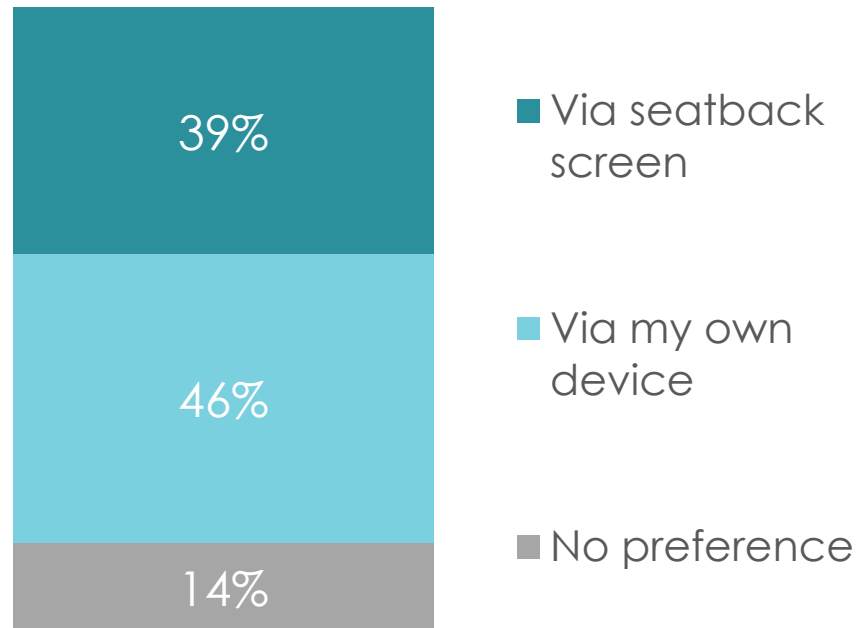
# FLYERS SLIGHTLY PREFER TO INTERACT WITH THE AIRLINE'S ENTERTAINMENT SYSTEM VIA THEIR OWN DEVICE, BUT ARE EVENLY SPLIT IN PREFERENCE FOR USING AIRLINE'S CONTENT VS THEIR OWN



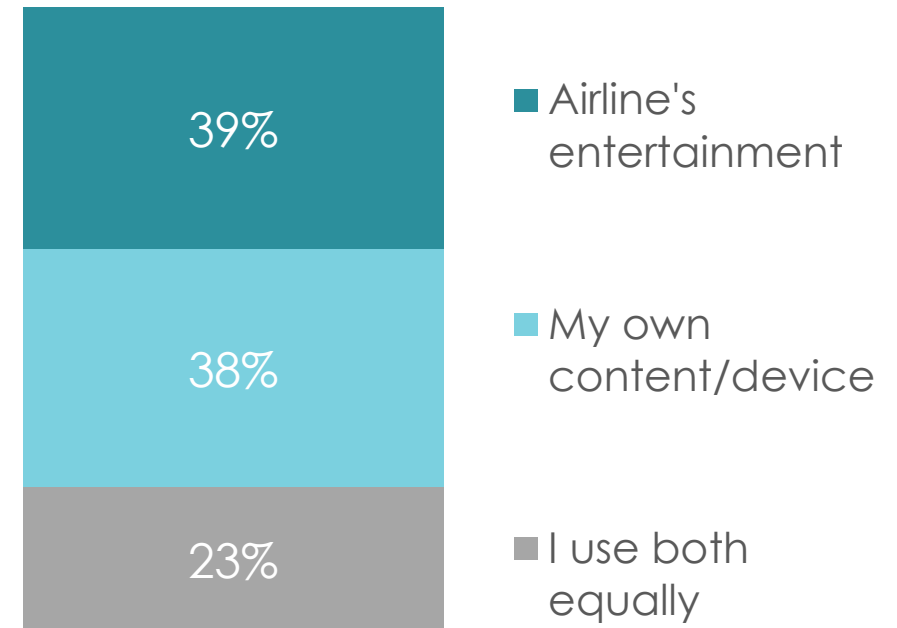
Airline entertainment system preference

- Airline traveler -

## Airline entertainment system access



## Content preference



BASE: AIRLINE TRAVELER (n=665)

Q54. Given a choice, which is your preference to access the airline's entertainment system?

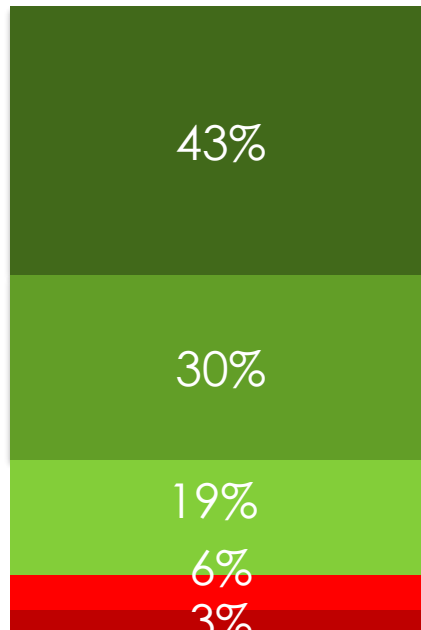
Q55. And, do you usually prefer to watch/listen to the airline's entertainment choices or watch your own content you may have downloaded on your own mobile device (smartphone, tablet, laptop) before your trip?

# 3 IN 4 HOTEL GUESTS STILL CONSIDER AN IN-ROOM TV AS “ESSENTIAL” OR “VERY IMPORTANT”, BUT EVEN MORE – 9 IN 10 – NOW CONSIDER A STRONG IN-ROOM WI-FI SIGNAL TO BE SO



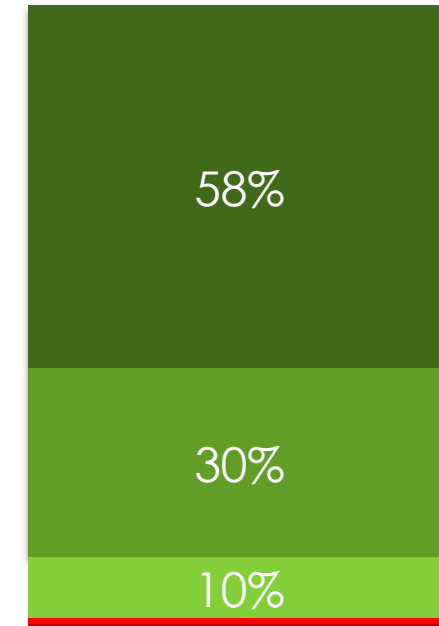
Importance of TV set/Wi-Fi in hotel room  
- Hotel used during long-distance travel -

## Importance of in-room TV set



- Essential
- Very important
- Somewhat important
- Somewhat unimportant
- Not at all important

## Importance of in-room Wi-Fi



BASE: HOTEL USED DURING LONG-DISTANCE TRAVEL (n=1,434)

Q62. Overall, how important is it to you to have a TV set in your hotel room?

Q63. And how important is it to you to have a strong Wi-Fi signal in your hotel room?

Note: %'s shown with 3%+ **hub** | ENTERTAINMENT RESEARCH



4

KEY TAKE-AWAYS

# OVER-THE-AIR RADIO IS STILL THE PRIMARY MEDIUM IN CARS



- **2/3 use OTA radio “every” or “most” times they drive**
- **OTA radio is the most-desired auto media device**
- **Implication:** Radio is still the king of the road (even if streaming is growing)



# MUSIC SOURCES DOMINATE IN-CAR DIGITAL ENTERTAINMENT



- OTA is #1 but **digital music-related media make up the second tier**
- **Implication:** Music sources are the most important digital options in personal vehicles.



# PASSENGERS OFTEN USE DIFFERENT MEDIA SOURCES THAN DO DRIVERS



- 1/3 say their passengers use different media devices
- Those with kid passengers report an even higher level
- **Implication:** Media services and auto makers can make different pitches to drivers and passengers



# MEDIA OPTIONS EXERT CONSIDERABLE INFLUENCE ON CHOICE OF VEHICLE



- 4 in 10 drivers say media options would make them more likely to buy a car.
  - OTA radio
  - Satellite radio
  - Voice control
  - Apple CarPlay
- **Implication:** Auto OEMs should push the envelope on options – but remember radio is still #1



# OTA RADIO IS ALSO THE LEADING MEDIUM FOR MASS TRANSIT – BUT ONLY BY A LITTLE



- **Half use OTA radio “every” or “most” times**, ranking it #1
- **Digital media are not far behind:**
  - Personal music downloads
  - Free streaming music service
  - Free streaming video
  - Subscription streaming music service
- **Implication:** Digital to increase share with Wi-Fi built into mass transit and unlimited mobile data plans ubiquitous





# IN THE AIR, IT'S "BRING YOUR OWN MEDIA"

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- **Two in five** read books “every” or “most” times they fly (#1)
- **Digital media are also important:**
  - Personal music downloads
  - Subscription streaming music service
  - Subscription streaming video
- **Flyers have a preference for using their own devices and content**
- **Implication:** Airlines have lost their monopoly on in-the-air entertainment



# TRADITIONAL TV IN HOTELS IS STILL ESSENTIAL – BUT NOT AS ESSENTIAL AS GOOD WI-FI



- $\frac{3}{4}$  say an in-room TV is “essential” or “very important”...
- ...even more – nine in ten – consider a strong in-room Wi-Fi signal as “essential” or “very important”
- **Implication:** TV is still a surprisingly strong pull but good Wi-Fi is table stakes for in-room media



A hand is raised in the air, palm facing forward, with fingers slightly spread. The hand is wearing a watch with a dark strap and a metal case. The background is a blurred crowd of people at night, with warm, out-of-focus lights creating a bokeh effect. A vertical white line is positioned to the left of the contact information.

# QUESTIONS?

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