THE STATE OF MEDIA

2024

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CROWD REACT MEDIA
A Division of harker bos group

Presentation of research findings by Harker Bos Group

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THE STATE OF MEDIA - 2024

A presentation of research findings by Harker Bos Group

Welcome to "The State of Media," a comprehensive whitepaper presented by Harker Bos Group. In an effort to understand the ever-evolving media consumption habits in the United States, Harker Bos Group conducted an extensive study involving over 500 individuals aged 18 and above. Unlike traditional analyses based on age and gender, our approach focused on exploring media behaviors from a different angle—diving into the distinctions between urban versus suburban + rural residents, as well as contrasting habits of office workers versus those in remote or hybrid work setups.

This whitepaper presents our findings, offering a fresh perspective on media consumption in 2024. Instead of rehashing known trends, our study aimed to uncover less explored patterns and preferences within these distinct segments of the population. From varied content preferences to differing engagement habits, our research uncovered intriguing insights that shed light on how people interact with media in their daily lives.

Join us as we delve into this exploration, providing a comprehensive view of the nuanced media preferences and behaviors across urban and suburban + rural demographics and the unique dynamics within office-based and remote work environments. This whitepaper aims to illuminate the lesser-discussed aspects of media consumption trends, offering valuable insights into the diverse ways individuals engage with media in today's rapidly changing landscape.

HOW THIS WHITEPAPER IS ORGANIZED

MEDIA OVERVIEW

- An analysis of overall media engagement trends among the surveyed population, highlighting commonalities and general patterns across various media activities.

INDIVIDUAL PAGES FOR MEDIA ACTIVITIES

1. Cable/Satellite TV
2. Radio
3. Podcasts
4. News Media (Online News, Newspapers, Magazines, News Apps)
5. Social Media
6. Streaming TV
7. Music Streaming Services
8. Video Games
9. Watch Videos on YouTube

CONTRASTING TRADITIONAL BROADCASTING WITH NEWER DIGITAL BROADCASTS

- Cable/Satellite TV vs. Streaming TV: A comparative analysis highlighting differences in consumption patterns, preferences, and engagement between traditional cable/satellite television and streaming television services.
- Radio and Music Streaming Services: Exploring the nuances and disparities between conventional radio usage and the consumption patterns of music streaming services.

ADDITIONAL CONCLUSIONS AND KEY TAKEAWAYS

- Summarizing overarching findings, intriguing insights, and significant conclusions derived from the analysis across various media activities and demographic segments.

KEY TERMS IN WHITEPAPER

TOTAL

- Definition: Refers to the entire pool of respondents involved in the survey, constituting over 500 individuals aged 18 and above residing in the United States who engage with any of the following types of media:
  - Cable/Satellite TV
  - Radio
  - Podcasts
  - News Media (Online News, Newspapers, Magazines, News Apps)
  - Social Media
  - Streaming TV
  - Music Streaming Services
  - Video Games
  - Watch Videos on YouTube

URBAN AUDIENCE

- Definition: Denotes respondents who indicated "Urban" as their response to the question, "Which of the following best describes where you live?"

SUBURBAN/RURAL AUDIENCE

- Definition: Encompasses respondents who indicated "Suburban" or "Rural" as their response to the question, "Which of the following best describes where you live?"

OFFICE WORKERS

- Definition: Represents individuals who responded "I work at an Office/Jobsite" to the query, "Do you work at an office/jobsite or at home?"

REMOTE/HYBRID WORKERS

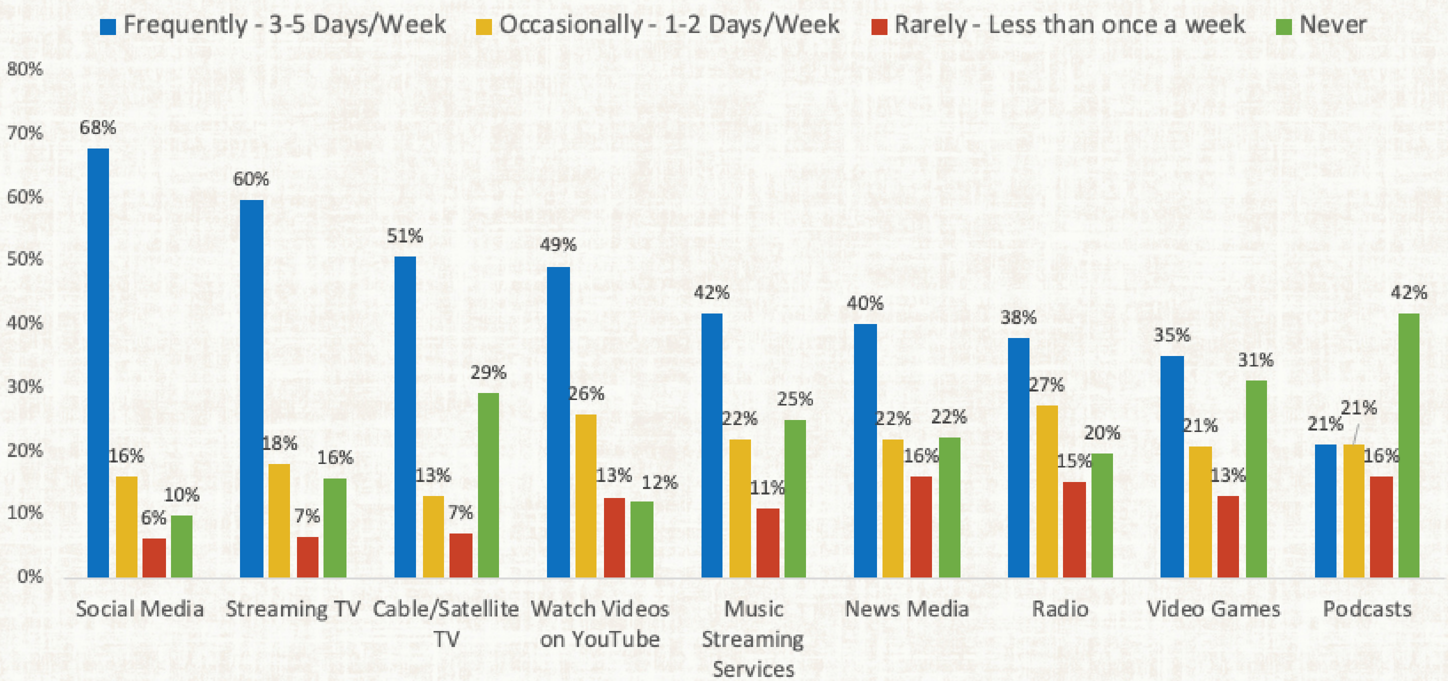
- Definition: Includes respondents who answered either "I work at home" or "'I work both at an office/jobsite and at home (hybrid)" when asked, "Do you work at an office/jobsite or at home?"

MEDIA OVERVIEW

Many hours of engagement across a variety of platforms.

FREQUENCY OF MEDIA ENGAGEMENT

In examining the frequency of engagement across media platforms, social media emerges as the most frequently engaged-with medium, with a substantial 68% of respondents engaging frequently (3-5 days/week). Following closely, streaming TV (60%) and cable/satellite TV (51%) also exhibit high engagement rates. However, podcasts (21%) and video games (35%) show moderate levels of frequent engagement.



DAILY DURATION OF MEDIA ENGAGEMENT

Regarding the average time spent daily on media activities, a significant portion engages for several hours. For instance, 23% spend 4 to 8 hours on cable/satellite TV, while 21% engage with streaming TV for the same duration. In contrast, platforms like podcasts (9%) and news media (7%) record fewer respondents spending 4 to 8 hours daily. Across various platforms, a significant portion spends 1 to 2 hours on daily engagement, suggesting a diversified engagement pattern.

KEY TAKEAWAYS

Social media emerges as the most frequently engaged-with platform, followed closely by streaming and cable/satellite TV. However, radio, podcasts, video games, and news media exhibit moderate levels of engagement, with varying degrees of frequency. The duration of engagement varies across platforms, with a sizable portion spending several hours daily on cable/satellite TV and streaming services.

IMPLICATIONS FOR THE MEDIA INDUSTRY

These findings highlight the need for media companies to tailor content strategies to accommodate varied engagement levels across different platforms. There's a clear emphasis on digital media due to high engagement rates observed in platforms like streaming TV and social media. Revitalizing engagement in traditional media formats like cable/satellite TV and radio requires exploration of new strategies. Additionally, understanding and addressing demographic preferences will be key in effectively engaging different population segments. Enhancing user experiences by focusing on personalized content and user-friendly interfaces can also aid in increasing engagement and retention across platforms.

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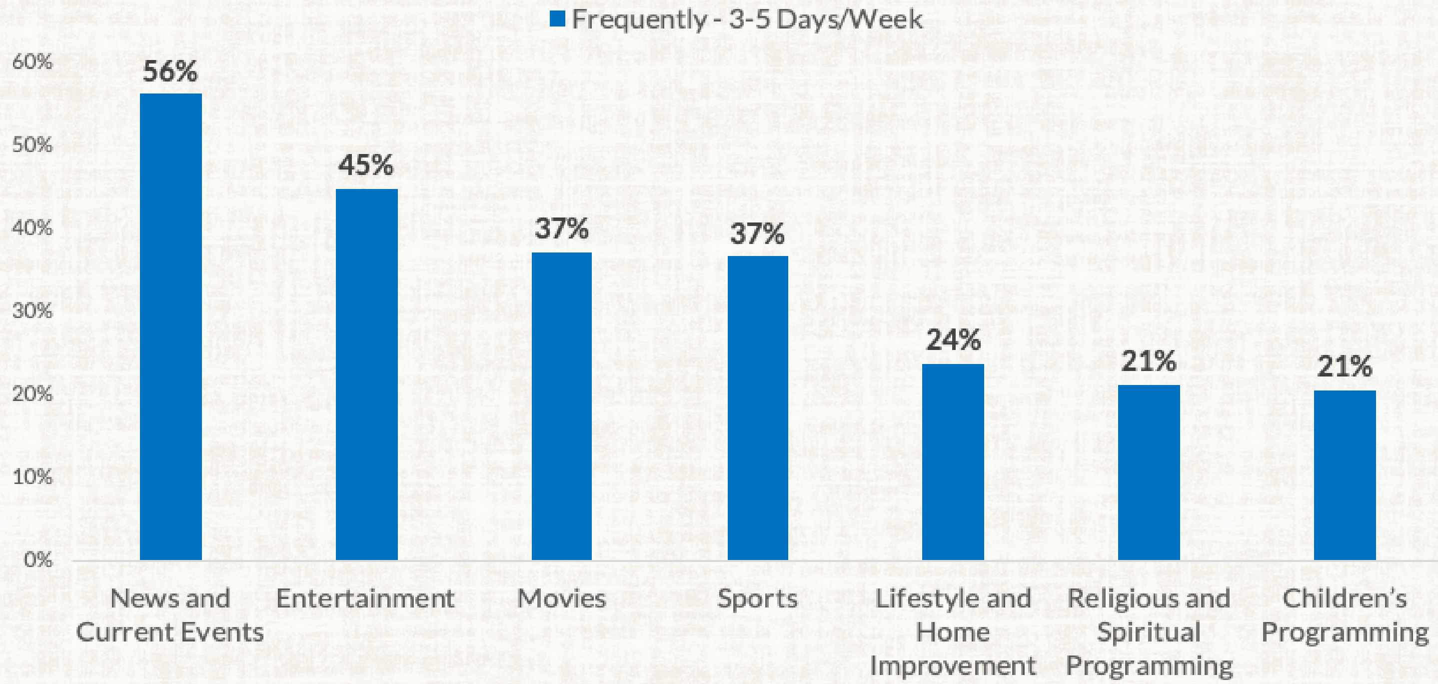
CABLE/SATELLITE TV

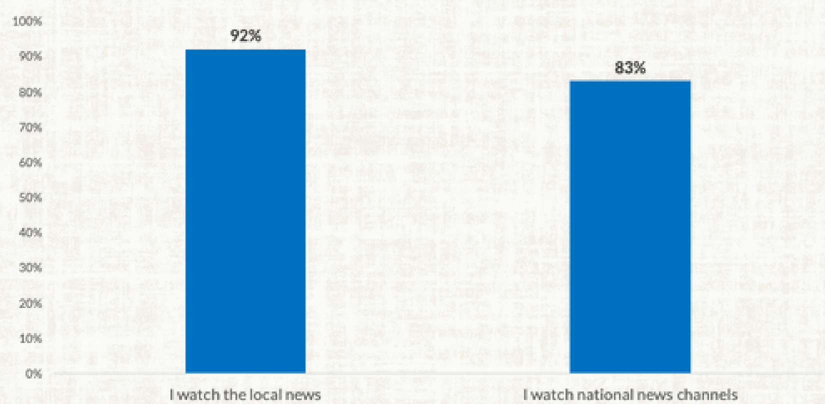
64% of Media Consumers



Q: During a typical week, how often do you watch the following types of programming on Cable/TV?

Audiences' frequency of cable/satellite TV content consumption demonstrates diverse viewing habits across categories. The data reveals that news and current events are the most frequently watched, with a substantial 56% of respondents engaging in this category 3-5 days a week. Entertainment programs closely follow, with around 45% of participants tuning in 3-5 days a week. Sports and movies also capture regular viewership, with approximately 37% to 35% of respondents engaging in these categories 3-5 days a week. Moreover, there is varied interest in other programming genres, including children's programming, lifestyle, home improvement, and religious/spiritual programming, each drawing engagement from different percentages of respondents. This diversity in viewing habits emphasizes the need for cable/satellite TV networks to cater to a broad range of interests and preferences within their content offerings.

Local and national news also exhibit high engagement, with 92% tuning into local news and 83% following national news. Fox News (71%) and CNN (67%) lead in regular viewership for national news, trailed by ABC News (45%) and NBC News (43%).



Q: Do you watch the local or national news?

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CABLE/SATELLITE TV

(continued)

KEY TAKEAWAYS

- News Dominates Viewership: News content, both local and national, maintains high viewership frequency, emphasizing its significance in Cable/TV consumption habits.
- Diversity in Interests: While news and entertainment draw significant viewership, there's a spread across various content categories like sports, movies, lifestyle, and religious/spiritual programming.
- Polarization in News Channels: Fox News and CNN lead in national news viewership, suggesting strong viewer loyalty and divergence in audience preferences.

IMPLICATIONS FOR THE INDUSTRY

- Content Strategies: Cable/TV networks should focus on diverse content offerings to cater to varied viewer interests beyond news and entertainment.
- Competitive Landscape: Understanding viewership patterns of news channels helps networks tailor content to retain and attract audiences in a highly competitive news segment.

OFFICE WORKERS VS. HYBRID + REMOTE

- Virtually tied when looking at high frequency users (3-5 days per week)
  - Office Workers: 58%
  - Hybrid + Remote : 54%
- Hybrid + Remote Workers are more likely to consume cable/satellite at least once a week (85%), compared to Office Workers (75%).
- Little difference between daily time spent

URBAN VS. SUBURBAN + RURAL

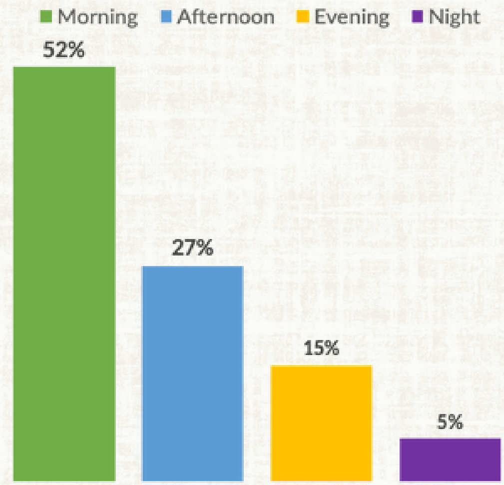
- Urban Audiences are more likely to be high frequency users (3-5 days per week) at 58%, vs. Suburban + Rural at 44%
- Urban Audiences are much more likely to watch sports programming (77%) than Suburban + Rural Audiences (59%), children's programming (59%) than Suburban + Rural Audiences (30%), and religious programming (64%) than Suburban + Rural Audiences (23%).
- Urban Audiences watch the local news (97%) and national news (90%) at a higher rate the Suburban + Rural (85% and 73%).

RADIO

65% of media consumers

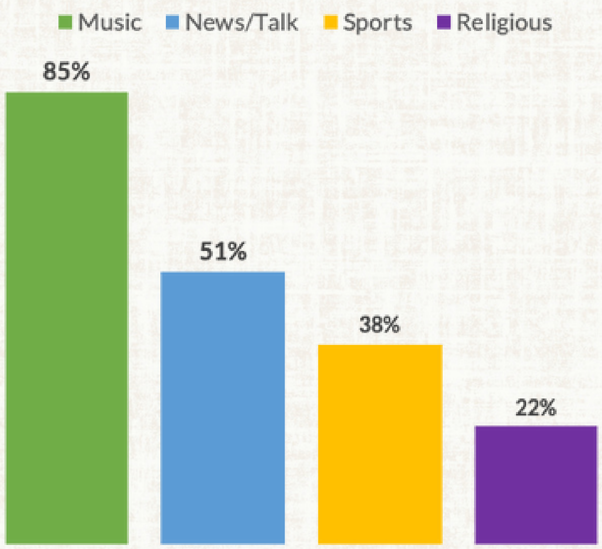
RADIO CONSUMPTION TRENDS

The consumption patterns of radio among respondents display prevalent preferences and engagement trends. Notably, the morning emerges as the dominant listening time, with 52% of individuals favoring morning radio shows. Radio appears to complement diverse activities, especially during driving (68%) and relaxation (44%), indicating its role in both active and leisurely pursuits. Listening sessions tend to be shorter, with a significant majority (43%) tuning in for durations ranging from 30 minutes to 1 hour.



Q: During what time of day do you listen to the radio the most?

Preferences and favored formats also shed light on listener inclinations. A strong preference for music (85%) is evident, followed by news/talk (51%) and sports (38%). The appeal of stations blending various music genres is apparent, with rock (55%), pop (55%), and country (43%) being the top genres. While traditional AM/FM radio remains preferred by 56% of respondents, 37% opt for mobile or tablet streaming.



Q: What radio format(s) do you regularly listen to?

Radio show preferences exhibit distinct inclinations, especially during morning and afternoon slots. Mornings are crucial, with 69% incorporating radio into their routines, primarily for news updates (70%) and music (74%). In contrast, afternoons see 80% of individuals listening to unwind, favoring music (89%) and entertainment (46%).

The interactive nature of radio is evident, with 53% actively participating in contests or interactive segments during morning shows. Additionally, 54% highlight the importance of local coverage, emphasizing the significance of community updates and local events. Factors influencing station selection include sound quality (67%), station availability (54%), and ease of use (53%).

IMPLICATIONS FOR THE RADIO INDUSTRY

- Content Strategy: Emphasize engaging morning content, mixing news updates with music to cater to morning routine listeners.
- Genre Diversity: Curate stations that blend various music genres to appeal to the majority who prefer a mix.
- Local Relevance: Prioritize local event coverage and community updates, meeting the 54% who find it very important.
- Tech Integration: Invest in seamless, high-quality streaming options for mobile devices, enhancing user experience and accessibility.

RADIO
(continued)

OFFICE WORKERS VS. HYBRID + REMOTE

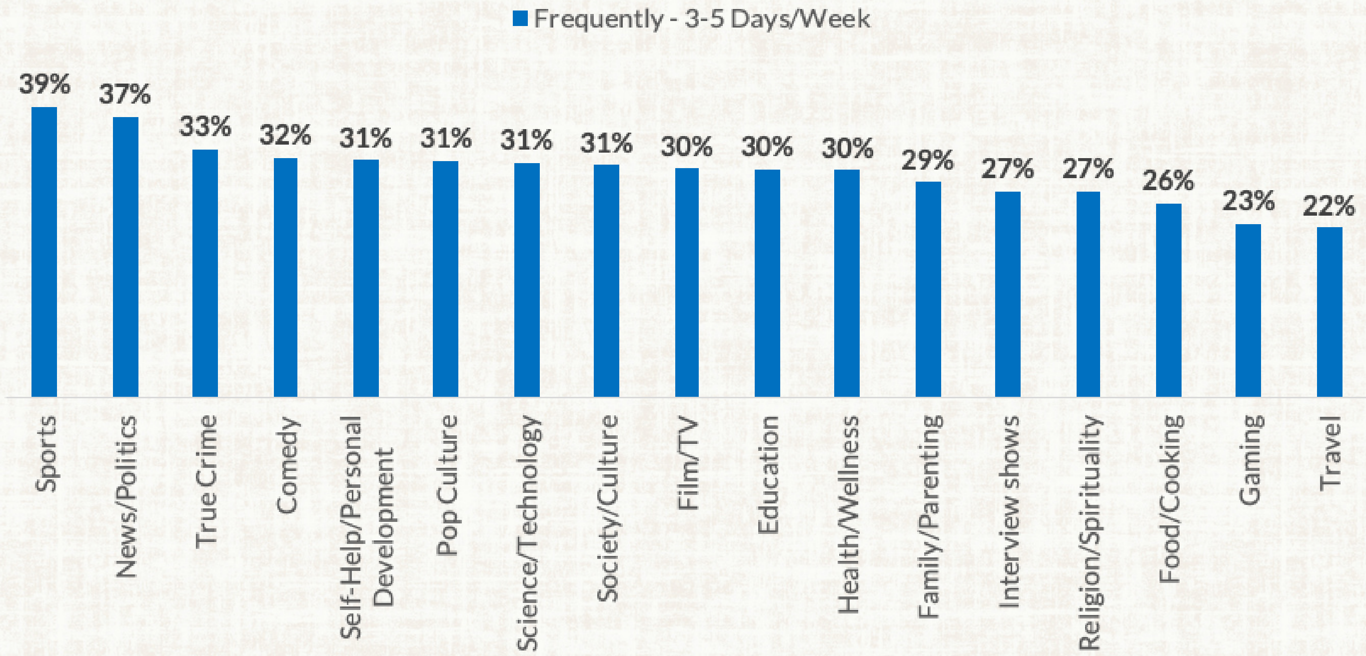
- Office Workers (75%) and Hybrid + Remote Workers (72%) have about the same likelihood to listen to the radio at least once a week.
- Office Workers are higher frequency radio listeners (51% 3-5 days per week) than Hybrid + Remote Workers (43% 3-5 days per week).
- Hybrid + Remote Workers listen to the radio more in the morning (70%) than Office Workers (51%).

URBAN VS. SUBURBAN + RURAL

- Urban Audiences are higher frequency radio listeners (43% 3-5 days per week, 70% at least once a week) than Suburban + Rural Audiences (33% 3-5 days per week, 60% at least once a week).
- There are no significant differences in the times that Urban and Suburban + Rural Audiences tune into the radio.
- Suburban + Rural Audiences listen to the radio while driving (74%) more than Urban Audiences (63%), whereas Urban Audiences listen more while working (38%) and exercising (46%), than suburban (21% & 24%).
- Urban Audiences are much more happy with today's Pop than Suburban + Rural Audiences – 57% of Urban Audiences think today's pop songs are better than a few years ago, while only 14% of Suburban + Rural Audiences agree
- Same for Country - 72% of Urban Audiences think today's country songs are better than a few years ago, while only 23% of Suburban + Rural Audiences agree
- Coverage of local events and happenings is key to Urban Audiences, 70% say it's very important, while only 36% of Suburban + Rural agree (though 48% do feel it's somewhat important).
- Urban Audiences are 30 points more likely to participate in contests, call-ins, or interactive segments on the radio.

PODCASTS

44% of media consumers



Q: How often do you listen to the following podcast genres?

Podcasts continue to attract diverse listening habits and preferences among audiences. Distinct genre preferences are evident, with True Crime (33%), News/Politics (37%), and Sports (39%) podcasts drawing higher-frequency listeners, appealing to varied interests. The channels for discovering new podcasts predominantly include podcast players (62%), social media (65%), and search engines (42%). Additionally, audience engagement remains significant, with the majority (66%) reading show notes and 58% deeming them and relevant links very important.

Preferences regarding podcast formats and consumption behaviors underscore varying engagement levels. While 43% prefer audio-only formats, 35% show interest in a hybrid audio-video experience. Regarding listening duration, a substantial 34% listen to entire podcast episodes, while 30% consume most of the content. Ideal podcast lengths seem to resonate around the 30-minute to 1-hour mark, preferred by 48% of listeners, followed by 29% favoring durations between 15 to 29 minutes.

Listening behaviors highlight multitasking while engaging with podcasts. Around 66% multitask, primarily during activities such as driving (54%), cooking (55%), exercising (53%), and performing household chores (51%). Furthermore, 45% showcase interest in diverse content by tuning in to 2-3 different podcasts weekly.

Insights into advertisement preferences reveal nuances in ad tolerance and impact. The majority (29%) prefer no commercials, while 22% consider one commercial appropriate in a 30-minute podcast. Notably, 28% find host-read ads significantly influential in purchasing decisions, potentially indicating a sense of trust and credibility. However, 43% skip some ads, suggesting an opportunity for more engaging and less intrusive advertising formats.

IMPLICATIONS FOR THE PODCAST INDUSTRY

- Content Strategy: Focus on popular genres like True Crime, News/Politics, and Sports to cater to high-frequency listeners.
- Engagement Enhancement: Emphasize show notes and relevant links to cater to the 66% audience that reads them and values their inclusion.

PODCASTS

(continued)

IMPLICATIONS FOR THE PODCAST INDUSTRY (CONTINUED)

- Format Customization: Offer both audio and video podcast formats to cater to varying listener preferences.
- Length Consideration: Align podcast durations around the preferred 30-minute to 1-hour mark to resonate with 48% of listeners.
- Ad Experience Improvement: Explore less intrusive ad formats and prioritize host-read ads for enhanced impact.
- Ad Relevance: Tailor ads to resonate with the target audience's interests, considering the high preference for genre-specific content.
- Host-Read Ads: Hosts and advertisers should collaborate for more authentic and impactful advertisements.
- Ad Length: Consider ad frequency and placement carefully, recognizing that excessive ads can lead to skip rates.

OFFICE WORKERS VS. HYBRID + REMOTE

- Hybrid + Remote Workers are more likely to listen to a podcast at least once a week (67%) than Office Workers (56%).
- Hybrid + Remote Workers read show notes for a podcast (82%).
- Hybrid + Remote Workers are more than twice as likely to listen to an entire podcast episode (46%) than Office Workers (21%).

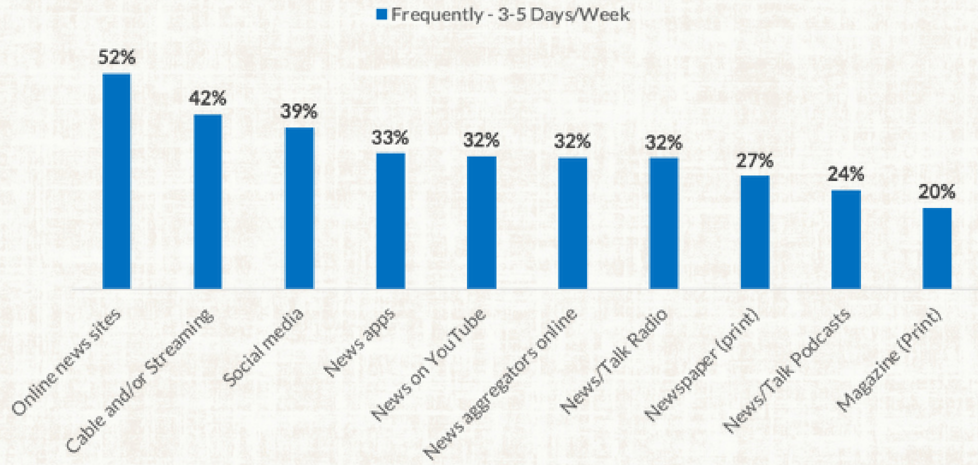
URBAN VS. SUBURBAN + RURAL

- Urban Audiences are twice as likely to listen to a podcast at least once a week (57%) than Suburban + Rural Audiences (28%).
- Urban Audiences are more likely to use multiple ways to discover podcasts, through social media (73%), in the podcast player (70%), search engines (50%), and YouTube (46%), whereas Suburban + Rural Audiences use less ways and more infrequently, via a search engine (53%), social media (48%), and in the podcast player (48%).
- Urban Audiences read show notes for a podcast (75%). It’s less important for the Suburban + Rural counterparts (48%).
- Suburban + Rural Audiences are almost twice as likely to listen to an entire podcast episode (48%) than Urban Audiences (27%).
- Urban Audiences find it especially important that a podcast host reads their ads (58% agree), as opposed to only 34% of Suburban + Rural Audiences who find it important.

NEWS MEDIA

62% of media consumers

News consumption habits among audiences highlight a predominant shift toward digital platforms while retaining some reliance on traditional media sources. Online news sites (52%) are the top news source, signaling a significant move away from traditional print media. Social media's impact on news consumption is apparent, with 39% using platforms like Facebook (81%), Twitter (57%), and Instagram (61%) to access news content.



Q: How often do you use the following sources for news media?

The preference for news sources underscores the continued influence of TV, with cable/streaming TV maintaining its significance at 42%. Meanwhile, online news sites (52%), news apps (33%), and news on YouTube (32%) solidify the digital transformation in news consumption habits. Although radio (32%) and news/talk podcasts (24%) showcase engagement, they exhibit relatively lower interaction levels within the digital landscape.

Daily news consumption durations vary, with a notable portion spending 1-2 hours (25%) and 2-4 hours (23%) engaging with news media.

IMPLICATIONS FOR THE NEWS MEDIA INDUSTRY:

- Digital Transformation: Focus on online news sites and apps due to the increasing preference for digital news consumption.
- Social Media Strategy: Leverage Facebook and Twitter's established user base for news distribution, although platform trust is shifting.
- Content Adaptation: Develop concise and engaging content to cater to varying durations of news consumption.
- Diversified Formats: Invest in video news content for social media platforms like Facebook and Instagram, as well as engaging podcast formats.
- Digital Prioritization: Invest in user-friendly news apps and optimize online news platforms for enhanced user experience.
- Engagement Enhancement: Create engaging and concise content for short-duration news consumption while maintaining quality for longer formats.
- Social Media Engagement: Maintain a consistent presence on dominant platforms like Facebook and Twitter while exploring newer platforms.

NEWS MEDIA

(continued)

OFFICE WORKERS VS. HYBRID + REMOTE

- Office Workers (72%) and Hybrid + Remote Workers (75%) are about the same likelihood engage with News Media at least once a week.

URBAN VS. SUBURBAN + RURAL

- Urban Audiences are much more likely to engage with News Media at least once a week (71%) than Suburban + Rural Audiences (54%).

TOP SOCIAL MEDIA SITES FOR NEWS

OFFICE WORKERS

- Facebook (80%)
- Instagram (73%)
- X (63%)
- TikTok (59%)

HYBRID + REMOTE

- Facebook (90%)
- X (79%)
- Instagram (77%)
- TikTok (52%)
- SnapChat (48%)

URBAN AUDIENCES

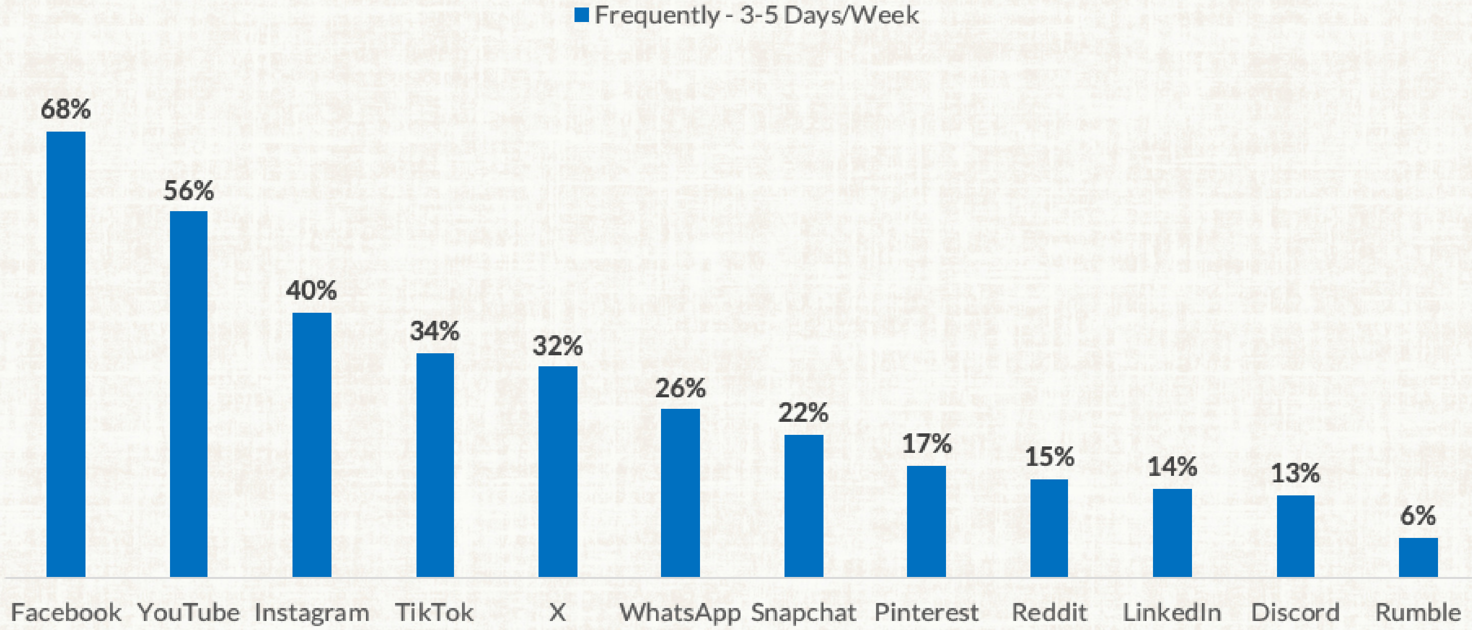
- Facebook (82%)
- Instagram (74%)
- X (67%)
- TikTok (55%)

SUBURBAN + RURAL AUDIENCES

- Facebook (79%)
- Instagram (41%)
- X (40%)
- TikTok (38%)

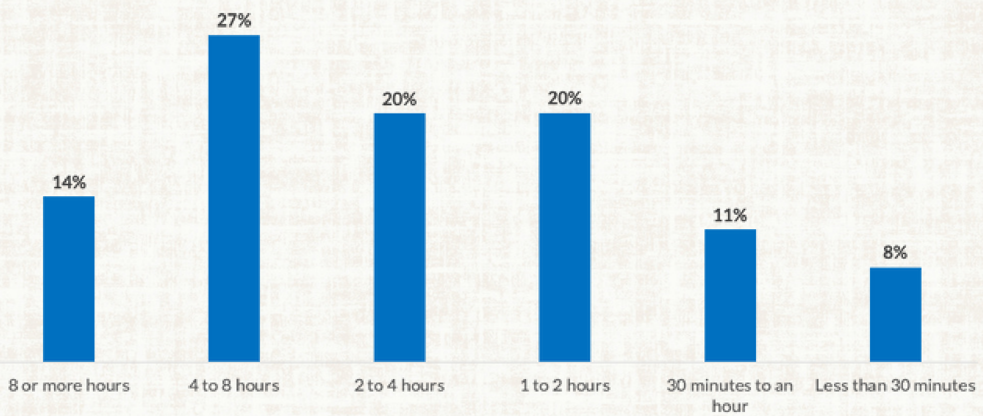
SOCIAL MEDIA

84% of Media Consumers



Q: How often do you use the following social media platforms?

Social media usage patterns reflect a diversity of preferences and purposes among users across various platforms. Facebook maintains its position as the most frequently used platform (68%) serving multiple functions, including communication, news consumption, and entertainment. Twitter, while frequented by 32%, is primarily utilized for information sharing and discussions. Instagram stands out for its high usage in entertainment (40%) and networking (42%) aspects, while TikTok's emergence witnesses growing popularity, with 34% using it for entertainment and discovery purposes.



Q: How long do you spend on average each day using social media?

The duration of social media usage varies, with a notable proportion (27%) spending 4-8 hours daily on these platforms. The majority of social media users spend at least an hour a day on social media.

Social media is increasingly perceived as a valuable information source (33%), indicating its evolving role in delivering news and information. While 49% acknowledge its role in maintaining connections, concerns related to mental health (24%) and privacy (28%) persist among users. Furthermore, 30% believe that social media significantly influences political opinions and elections.

The reasons for social media usage range from connectivity (56%), entertainment (48%), and self-expression (32%) to seeking news (32%), live updates (27%), discussions (15%), and engagement in activism (12%).

SOCIAL MEDIA

(continued)

IMPLICATIONS FOR THE SOCIAL MEDIA INDUSTRY

- Diverse Content Development: Embrace diverse content forms (videos, live streams) to cater to entertainment and information needs.
- Audience Engagement: Focus on fostering meaningful discussions, especially on topics like news, politics, and social causes.
- Privacy and Mental Health: Address concerns regarding privacy and mental health impacts to enhance user trust.
- Influencer Marketing: Leverage influencer marketing given the purchasing influence of social media recommendations.

INSIGHTS FOR MEDIA ORGANIZATIONS:

- Engagement Strategies: Leverage diverse content formats to engage users across multiple interests.
- Trustworthiness: Uphold accuracy and reliability in content shared, reinforcing credibility.
- Community Building: Facilitate platforms for constructive discussions and community engagement.

OFFICE WORKERS VS. HYBRID + REMOTE

- Hybrid + Remote Workers are more likely (95%) to use social media at least once a week than Office Workers (89%).

TOP SOCIAL MEDIA SITES

OFFICE WORKERS

- Facebook (80%)
- Instagram (73%)
- X (63%)
- TikTok (59%)

HYBRID + REMOTE

- Facebook (90%)
- X (79%)
- Instagram (77%)
- TikTok (52%)
- SnapChat (48%)

URBAN AUDIENCES

- Facebook (82%)
- Instagram (74%)
- X (67%)
- TikTok (55%)

SUBURBAN + RURAL AUDIENCES

- Facebook (79%)
- Instagram (41%)
- X (40%)
- TikTok (38%)

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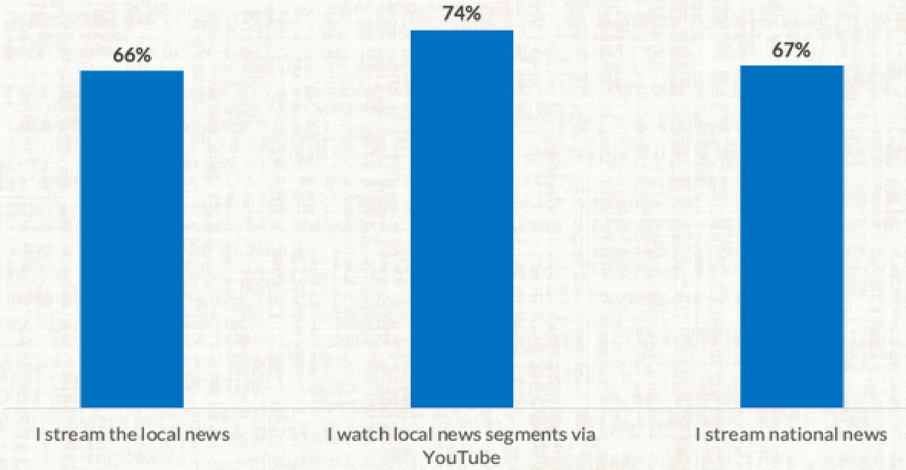
STREAMING TV

78% of media consumers



Streaming TV habits illustrate a broad spectrum of content preferences among users, encompassing various genres such as entertainment, news, movies, and sports. Notably, local news holds significant engagement, with 66% frequently streaming local news content, and 74% watching local news segments via YouTube.

Concerning national news, a substantial 67% stream national news content, with Fox News (67%) and CNN (65%) leading as the most preferred sources. Other notable sources include MSNBC (33%), NBC News (39%), and BBC News (29%).

The duration of streaming TV content remains extensive, as 47% spend 4 or more hours daily engaging with this form of media. Additionally, 85% subscribe to premium streaming services, with Netflix (80%), Amazon Prime Video (62%), and Hulu (53%) emerging as the top choices. Netflix particularly stands out as the most favored platform (51%), followed by Hulu (13%) and Amazon Prime Video (12%). In terms of devices, smart TVs (67%) remain the primary streaming devices, followed by Roku (35%) and Amazon Fire TV Stick (17%).

IMPLICATIONS FOR THE STREAMING INDUSTRY:

- Content Variety: A need for diverse content offerings to cater to varied interests, from news to entertainment and sports.
- Local News Accessibility: Platforms need to emphasize streaming local news content for wider accessibility and engagement.
- News Source Diversity: Platforms should ensure availability and accessibility of diverse national news sources.
- Platform Accessibility: Focus on optimizing experiences across various streaming devices for user convenience.
- Content Curation: Focus on providing a wide range of content, especially news and local programming.
- Catering to Preferences: Continue investing in favored premium services like Netflix, Hulu, and Amazon Prime Video.
- User Experience: Enhance the streaming experience across different devices for improved accessibility and user engagement.

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STREAMING TV
(continued)

OFFICE WORKERS VS. HYBRID + REMOTE

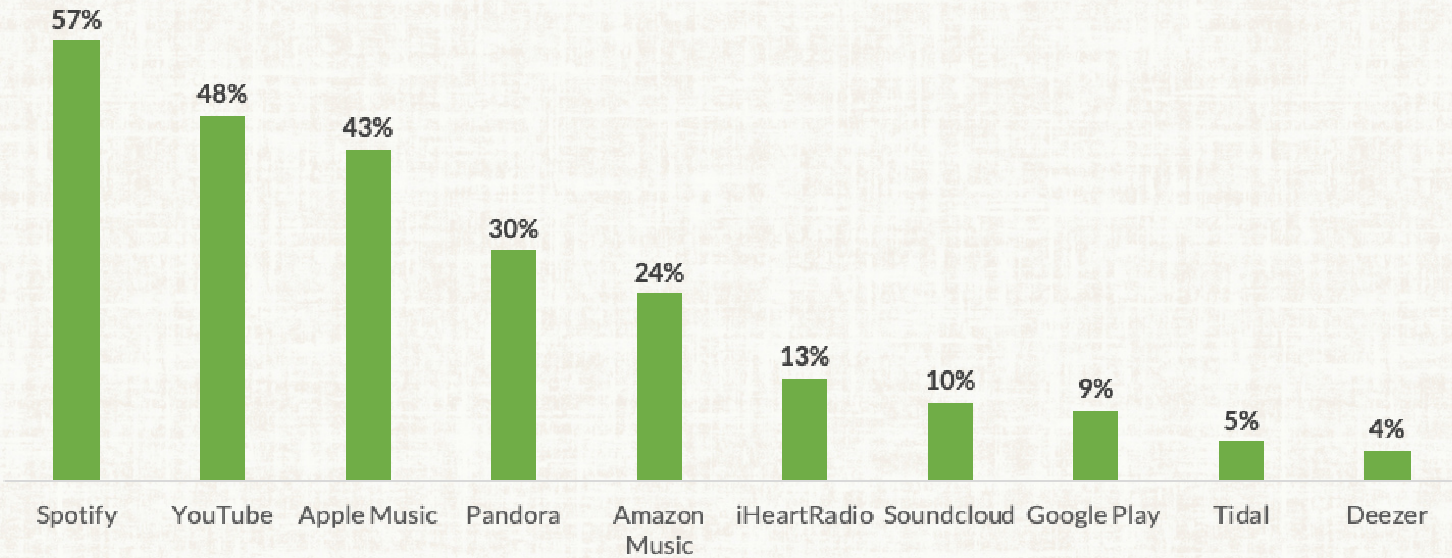
- There is virtually no difference in the likelihood of Office Workers (83%) and Hybrid + Remote Workers (84%) to stream TV at least once a week.
- Hybrid + Remote Workers are more likely to stream the local news (86%) than Office Workers (71%).
- Hybrid + Remote Workers are more than twice as likely to listen to an entire podcast episode (46%) than Office Workers (21%).
- Hybrid + Remote Workers and Office Workers are just as likely to subscribe to premium streaming services.

URBAN VS. SUBURBAN + RURAL

- There is virtually no difference in the likelihood of Urban Audiences (79%) and Suburban + Rural Audiences (76%) to stream TV at least once a week.
- Urban Audiences are more likely to stream the local news (77%) and national news (74%) than Suburban + Rural Audiences (local news: 49%, national news: 55%).
- Urban Audiences are more likely to watch local news segments on YouTube (81%) than Suburban + Rural Audiences (57%).
- Urban Audiences and Suburban + Rural Audiences are just as likely to subscribe to premium streaming services.

MUSIC STREAMING SERVICES

64% of Media Consumers



Q: Which of the following music streaming services do you use in a typical week?

Music streaming services like Spotify, Apple Music, YouTube, and Pandora stand out as the most frequently used platforms among users. Notably, Spotify and Apple Music emerge as the top preferred services, indicating their popularity and user preference within the streaming landscape. Users express high levels of satisfaction with various platforms, including Spotify, Apple Music, Pandora, Amazon Music, YouTube, and others, highlighting a positive sentiment toward these services.

Key factors contributing to user satisfaction encompass essential features such as ease of use, playlist creation tools, sound quality, and the size of the music library. Music discovery predominantly occurs through friend recommendations, social media channels, and algorithm-based suggestions integrated into the streaming apps. Notably, 41% of users have upgraded to premium services, seeking an ad-free experience or additional features, showcasing a willingness to invest for an enhanced streaming experience.

Moreover, the impact of music streaming on the industry is perceived positively by the majority (76%) of users, believing it has positively influenced both the music industry and artists. A significant proportion (69%) of users engage in creating their playlists, reflecting a high level of user involvement in curating their music experiences.

MUSIC STREAMING SERVICES

(continued)

IMPLICATIONS FOR THE MUSIC STREAMING INDUSTRY

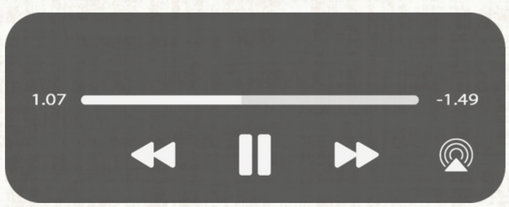
- Enhanced User Experience: Prioritize ease of use, playlist creation, and sound quality enhancements.
- Discovery and Recommendations: Continue refining algorithms to improve music discovery and recommendations.
- Premium Features: Continue offering enticing features to drive users towards premium subscription models.
- Artist Relations: Maintain a balance between user satisfaction and ensuring fair compensation for artists.
- Focus on User-Centric Features: Invest in user-friendly interfaces, playlist curation tools, and sound quality improvements.
- Algorithm Refinement: Continue improving algorithms for better music suggestions and personalized experiences.
- Balancing Free vs. Premium: Strive to maintain a balance between free ad-based services and premium subscription models.
- Supporting Artist Interests: Enhance initiatives that support fair artist compensation to address industry concerns.

OFFICE WORKERS VS. HYBRID + REMOTE

- Hybrid + Remote Workers are slightly more likely to stream music at least once a week (81%) than Office Workers (73%).

URBAN VS. SUBURBAN + RURAL

- Urban Audiences are more likely to stream music at least once a week (72%) than Suburban + Rural Audiences (56%).



VIDEO GAMES

56% of media consumers

Gaming preferences vary across different platforms and devices, with PlayStation 5/4 and Xbox Series X/S emerging as the top console choices among users. In addition to consoles, smartphones/tablets and laptop/desktop setups are widely favored for gaming due to their versatility. Players display diverse gaming methods, mixing PlayStation, Xbox, and mobile platforms, with a significant inclination towards gaming on smartphones/tablets for its convenience.

The gaming habits of users show that a majority (64%) spend between 1-8 hours daily immersed in gaming experiences. Notably, single-player games (52%) tend to be preferred over online/multiplayer (28%) experiences. Further, a considerable 59% favor free-to-play games compared to 22% who prefer games with upfront costs. Additionally, subscription services, with PlayStation Plus as the most popular choice (42%), attract 41% of users, while 41% have indulged in in-game purchases or microtransactions.

Preferences regarding gaming sessions indicate a mixed approach, with 39% favoring short gaming sessions, 20% preferring longer, in-depth sessions, and 41% enjoying a combination of both. Social media (53%) and friend recommendations (44%) are the primary sources for game discovery. As for game purchases, 37% opt for video game retailers, 30% use digital stores, and 33% utilize both methods.

Engagement within the gaming community is high, with 53% watching gaming content on platforms like Twitch or YouTube, and 26% following or participating in esports or competitive gaming events.

IMPLICATIONS FOR THE VIDEO GAME INDUSTRY:

- Mobile Gaming Focus: Given the popularity of gaming on smartphones/tablets, optimizing experiences for mobile platforms is crucial.
- Diverse Game Offerings: Continue catering to preferences for both free-to-play and upfront cost games.
- Subscription Models: Enhance premium gaming services to retain and attract subscribers.
- Short and Long-form Content: Develop games suitable for both short and extended play sessions.
- Mobile Optimization: Invest in mobile game development and user-friendly interfaces for smartphones/tablets.
- Diverse Game Portfolio: Maintain a balance between free-to-play and premium games to cater to diverse preferences.
- Subscription Enhancements: Offer compelling features and game selections within premium subscription services.
- Targeted Marketing: Leverage social media for game promotion and user engagement.

VIDEO GAMES
(continued)

OFFICE WORKERS VS. HYBRID + REMOTE

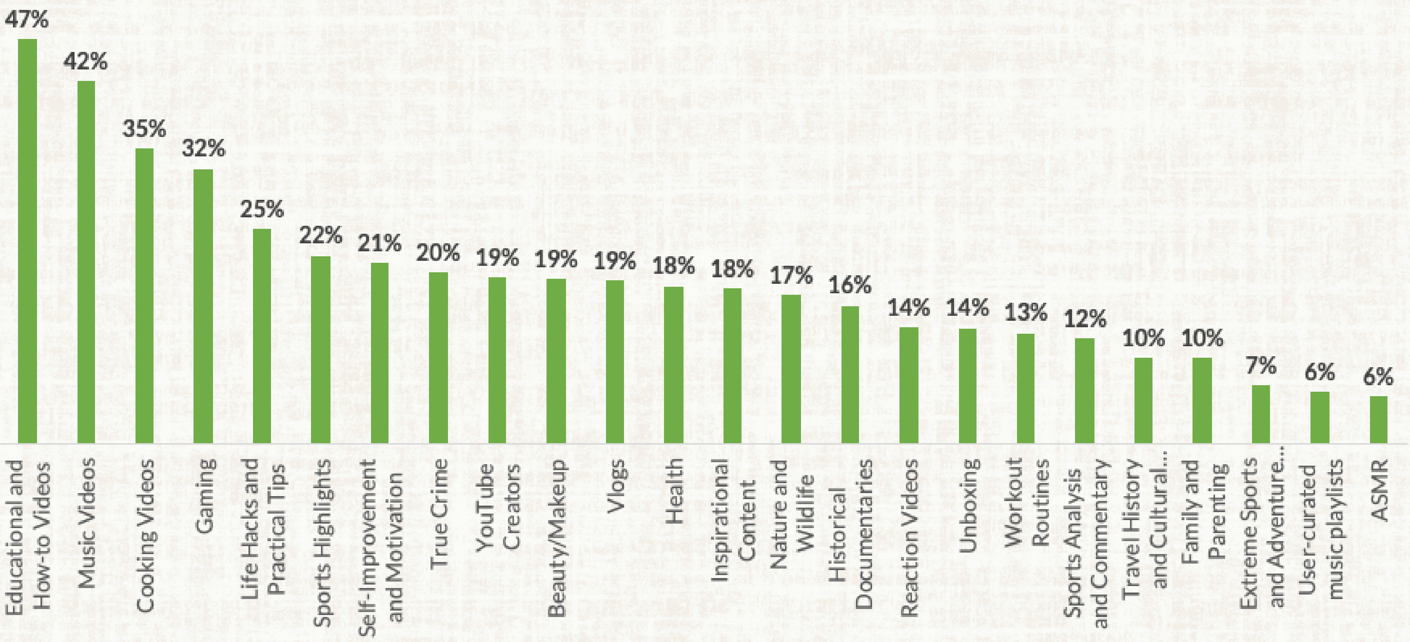
- Office Workers (63%) are slightly less likely than Hybrid + Remote Workers (71%) to play video games at least once a week.
- Hybrid + Remote Workers who play video games are more likely (67%) to subscribe to a premium gaming service than Office Workers who play video games (47%).

URBAN VS. SUBURBAN + RURAL

- Urban Audiences (66%) are more likely than Suburban + Rural Audiences (47%) to play video games at least once a week.
- Urban Audiences are high frequency video game players (44% 3-5 days per week) compared to Suburban + Rural Audiences (27% 3-5 days per week).
- Urban Audiences who play video games preferred way to play is via a Playstation 5 or 4 (45%), whereas Suburban + Rural Audiences preferred way to play is on their Smartphone/tablet (49%).
- Urban Audiences are much more likely (57%) to subscribe to a premium gaming service than Office Workers (19%).

WATCH VIDEOS ON YOUTUBE

75% of Media Consumers



Q: What types of content do you typically watch on YouTube?

YouTube usage habits among viewers vary significantly, with 10% spending 8 or more hours, followed by 25% devoting 4 to 8 hours and another 25% spending 2 to 4 hours on the platform. Additionally, 24% allocate 1 to 2 hours, while 9% spend 30 minutes to an hour, and 7% spend less than 30 minutes on YouTube. Educational and how-to videos stand out as the most watched content (47%), closely followed by music videos (42%), cooking videos (35%), gaming (32%), and life hacks, practical tips, and vlogs (ranging from 19% to 25%).

Regarding preferred video length, the majority gravitate toward videos ranging from 5 to 20 minutes (18% to 23%), while 14% prefer videos lasting 30 minutes to an hour. Engagement with content creators is prominent, with 63% subscribing to YouTube channels, 57% engaging through comments, likes, or dislikes, and 49% supporting creators by watching ads, purchasing merchandise, or contributing through platforms like Patreon.

Navigating YouTube varies, with 35% selecting videos from the recommendations or homepage, 25% visiting the subscriptions page for the latest content, and 40% using both avenues for video selection. The impact of influencers is notable, with 42% more likely to purchase products or services if featured in a YouTube creator's video, yet 64% skip ads when given the option.

IMPLICATIONS FOR THE INDUSTRY

- Video Length: Content creators should aim for video lengths between 5 to 20 minutes for optimal engagement.
- Diverse Content: The popularity of educational, music, cooking, and gaming content highlights the need for diverse content strategies.
- Engagement and Support: Enhanced audience engagement and support for creators signal opportunities for stronger creator-viewer relationships.

WATCH VIDEOS ON YOUTUBE

(continued)

IMPLICATIONS FOR THE INDUSTRY (CONTINUED)

- Personalized Recommendations: YouTube's algorithm-driven recommendations play a significant role in video selection. The balance between algorithmic suggestions and subscription-based content is crucial.
- Influencer Marketing: Creators endorsing products have a considerable impact on purchasing decisions, making influencer marketing on YouTube a valuable strategy.
- Ad-Skipping: Majority skip ads when possible; therefore, optimizing ad content for quicker engagement is essential.

OFFICE WORKERS VS. HYBRID + REMOTE

- Office Workers (80%) are slightly less likely than Hybrid + Remote Workers (87%) to watch videos on YouTube at least once a week.
- Hybrid + Remote Workers are more likely to subscribe to specific YouTube channels (79%) than Office Workers (69%).
- Hybrid + Remote Workers are more likely to engage with YouTube content creators by leaving likes and comments (76%) than Office Workers (64%).
- Hybrid + Remote Workers are more likely to support YouTube content creators by watching ads, buying merch, and donating to creators (78%) than Office Workers (60%).

URBAN VS. SUBURBAN + RURAL

- Urban Audiences (82%) are about as likely as Suburban + Rural Audiences (79%) to watch videos on YouTube at least once a week.
- Urban Audiences are more likely to subscribe to specific YouTube channels (74%) than Suburban + Rural Audiences (50%).
- Urban Audiences are more likely to engage with YouTube content creators by leaving likes and comments (71%) than Suburban + Rural Audiences (42%).
- Urban Audiences are more likely to support YouTube content creators by watching ads, buying merch, and donating to creators (62%) than Suburban + Rural Audiences (35%).
- Urban Audiences are much more likely to purchase a product or service if they see it on YouTube or mentioned by a content creators in a video (57%) than Suburban + Rural Audiences (26%).

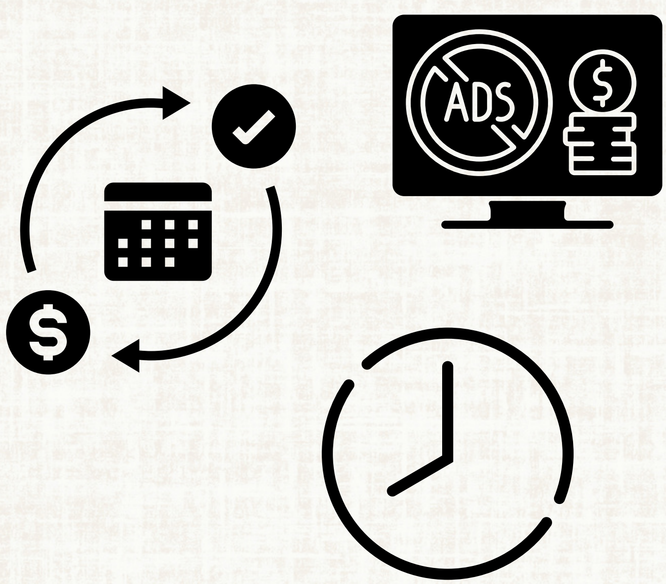
CABLE/TV VS. STREAMING TV: A COMPARISON

CABLE/TV USAGE:

- Frequent Users:
  - Typically watched by an older demographic.
  - Declining usage among younger generations.
- Preferred Device: Traditional television sets are the primary medium.
- Subscription Type: Subscribed to cable or satellite TV services.
- Time Spent: Varied viewing times with a range of preferences.
- Preferred Content: Wide range of channels and shows based on package subscriptions.
- Payment Model: Generally subscription-based, with less flexibility and more bundled offerings.
- Ads: Regularly featured, with limited control over ad viewing.

STREAMING TV USAGE

- Frequent Users:
  - Dominated by younger demographics, especially Millennials and Gen Z.
  - Growing adoption across all age groups.
- Preferred Device: Smart TVs, laptops, smartphones, and tablets.
- Subscription Type: Subscribed to various streaming services (e.g., Netflix, Hulu, Amazon Prime Video, Disney+).
- Time Spent: Significant time spent on streaming, often binge-watching series or movies.
- Preferred Content: On-demand, diverse content, including original series, movies, and documentaries.
- Payment Model: Flexible subscription plans, often with ad-free options and customizable content selections.
- Ads: Ad-free experiences available with premium subscriptions.



CABLE/TV VS. STREAMING TV: A COMPARISON

(continued)

KEY TAKEAWAYS

CABLE/TV	STREAMING TV
Demographic Divide: More prevalent among older generations; declining usage among younger age groups.	Demographic Shift: Increasing popularity across all age groups, especially among younger audiences.
Limited Flexibility: Bundled packages with fixed channel offerings; less personalized content.	Content Personalization: On-demand, customizable content options, and tailored recommendations.
Ad Viewing: Regular ads, limited control over ad exposure.	Ad Flexibility: Options for ad-free experiences with premium subscriptions.
Device Dependency: Primarily viewed on traditional television sets.	Device Diversity: Viewed on various devices, offering flexibility and mobility.

CONCLUSIONS

- Demographic Shift: Streaming TV is attracting a younger audience, while Cable/TV remains popular with older generations, but with declining usage among younger viewers.
- Content Flexibility: Streaming TV provides more diverse and customizable content options, whereas Cable/TV offers fixed bundled packages.
- Ad Experience: Streaming TV offers ad-free experiences, while Cable/TV features regular ads with limited control over viewing.
- Device Dependency: Cable/TV primarily relies on traditional TV sets, while Streaming TV offers viewing flexibility across multiple devices.

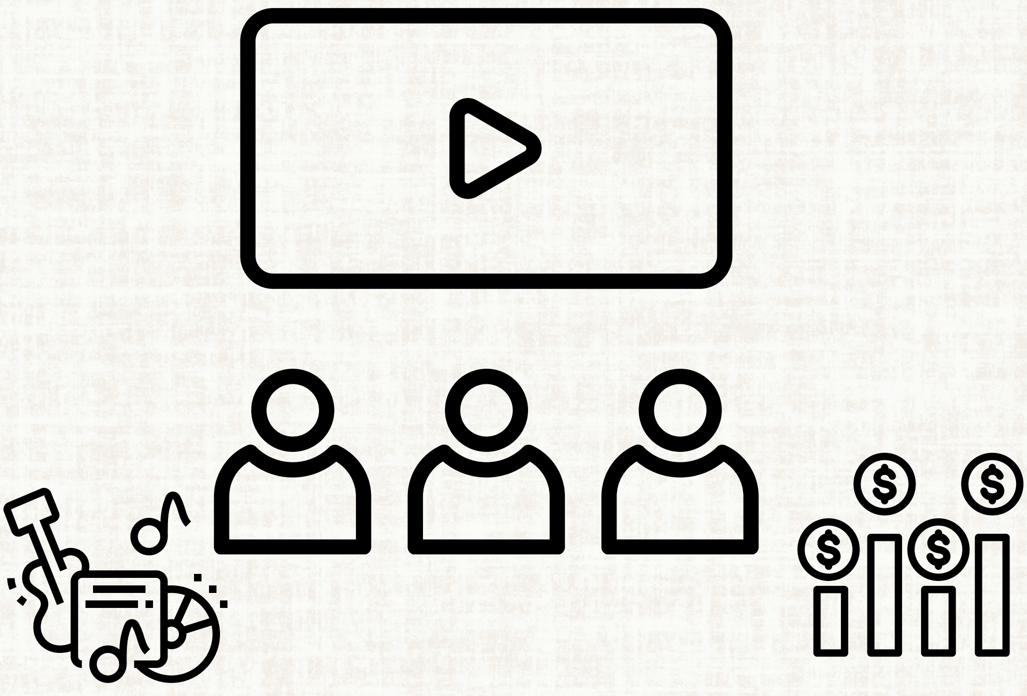
CABLE/TV VS. STREAMING TV: A COMPARISON

(continued)

IMPLICATIONS FOR THE INDUSTRY

- Adaptation to Viewing Preferences: Cable/TV services need to pivot towards more personalized and flexible content offerings to retain and attract younger viewers.
- Streaming Dominance: Streaming TV's increasing popularity necessitates Cable/TV providers to innovate, offering more flexibility, on-demand content, and improved ad experiences to stay competitive.
- Device Integration: Both Cable/TV and Streaming TV should focus on seamless integration across devices to meet evolving consumer viewing habits.

Understanding these differences and evolving consumer preferences is crucial for both Cable/TV and Streaming TV providers to cater to the changing landscape of entertainment consumption and maintain relevance in a competitive market.



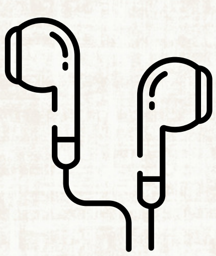
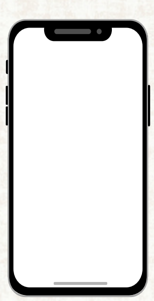
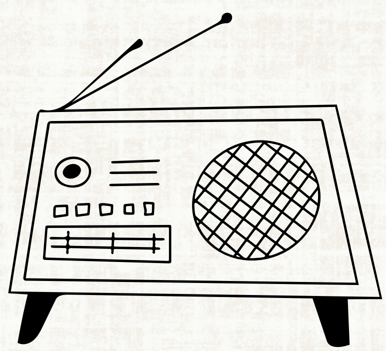
RADIO VS. STREAMING MUSIC: A COMPARISON

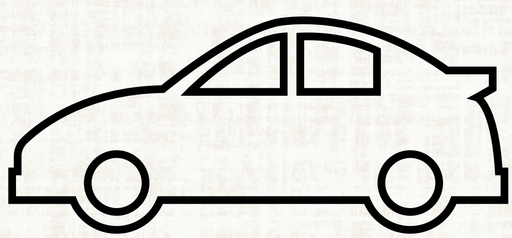
RADIO USAGE:

- Frequent Users:
  - Historically popular among various age groups, particularly older demographics.
  - Declining usage among younger audiences, especially compared to streaming services.
- Preferred Device: Traditional radio devices in homes, cars, and workplaces.
- Content Delivery: Scheduled broadcasts with fixed playlists and limited interactivity.
- Variety of Channels: Wide range of stations catering to diverse music tastes and talk shows.
- Ads: Regularly included, limited control over ad exposure.
- Localized Content: Often includes local news, weather, and community-based programs.

STREAMING MUSIC USAGE

- Frequent Users:
  - Predominantly popular among younger generations, especially Millennials and Gen Z.
  - Increasing adoption across all age groups.
- Preferred Device: Smartphones, computers, smart speakers, and tablets.
- Content Delivery: On-demand music streaming with personalized playlists and recommendations.
- Library and Variety: Extensive music libraries spanning various genres, artists, and customizable playlists.
- Ad Experience: Options for ad-free experiences with premium subscriptions.
- Global Access: Accessible worldwide, not bound by geographical limitations.



RADIO VS. STREAMING MUSIC: A COMPARISON

KEY TAKEAWAYS

RADIO	STREAMING MUSIC
Demographic Divide: Historically popular across different age groups but facing declining usage among younger audiences.	Demographic Shift: Increasing popularity across all age groups, particularly among younger demographics.
Limited Control: Fixed playlists and scheduled broadcasts with less personalization and interactivity.	Personalized Experience: On-demand, customizable playlists, and personalized recommendations.
Local and Diverse Content: Includes local news, talk shows, and diverse music channels.	Extensive Content Library: Vast music collections, offering diverse genres and artists.
Device Dependency: Primarily consumed via traditional radio devices in specific locations.	Device Diversity: Accessible on various devices, offering flexibility and mobility.
	Ad Flexibility: Options for ad-free experiences with premium subscriptions.

CONCLUSIONS

- Demographic Shift: Streaming Music is more appealing to younger generations, while Radio retains popularity among older demographics, facing challenges in attracting younger audiences.
- Content Delivery: Streaming Music provides on-demand and personalized content, while Radio follows a scheduled broadcast model with fixed playlists.
- Ad Experience: Streaming Music offers ad-free experiences with premium subscriptions, whereas Radio regularly includes ads.
- Device Dependency: Radio relies on traditional devices, while Streaming Music offers viewing flexibility across multiple devices.

RADIO VS. STREAMING MUSIC: A COMPARISON

(continued)

IMPLICATIONS FOR THE INDUSTRY

- Adaptation to Changing Preferences: Radio services need to innovate and offer more personalized and interactive experiences to attract younger audiences who prefer streaming services.
- Enhanced Personalization: Streaming Music platforms should continue focusing on personalization, curated playlists, and content recommendations to maintain and expand their user base.
- Mobile-Friendly Approach: Both Radio and Streaming Music should prioritize seamless integration across mobile devices to cater to evolving consumer habits.
- Monetization Strategies: Radio platforms might explore hybrid models or additional services to compete with ad-free experiences offered by streaming services.

Understanding these differences and evolving consumer preferences is critical for both Radio and Streaming Music providers to adapt and remain relevant in the constantly evolving music consumption landscape.

THE STATE OF MEDIA - 2024

“Thank You” from Harker Bos Group

We express our deepest gratitude to you, the reader, for dedicating your time and attention to this report. If you wish to delve deeper into this research or initiate your own study tailored to your radio station, podcast, television station, or any other media outlet, please feel free to reach out.

You can contact us at **katie.miller@harkerbos.com** or call us at **(919) 954-8300**.

Your insights and collaboration are pivotal in advancing our understanding of the dynamic media landscape. The study highlights the importance of tailored strategies to effectively engage diverse groups, including the differences between office workers and hybrid + remote workers and urban audiences vs. suburban + rural audiences.

As we continue to navigate the ever-changing media landscape, we stand committed to providing valuable insights that will help shape the future of media content and engagement. Thank you once again for being part of this journey.