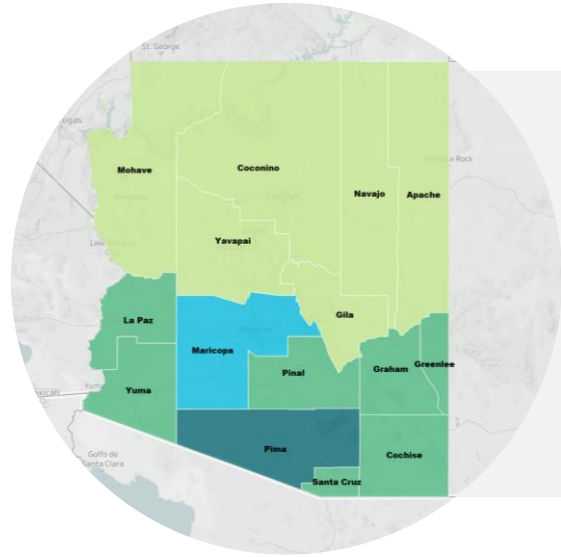




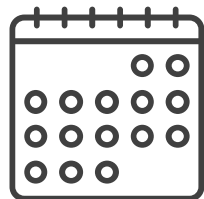
Arizona Broadcasters Association:
Arizona Media Study
2023



SmithGeiger conducted **1,250** interviews with Adults 18+ **weekly TV and radio consumers** throughout the state of **Arizona**.

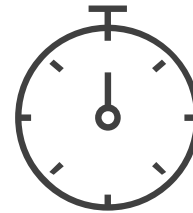
88% qualified

86% (In 2022)



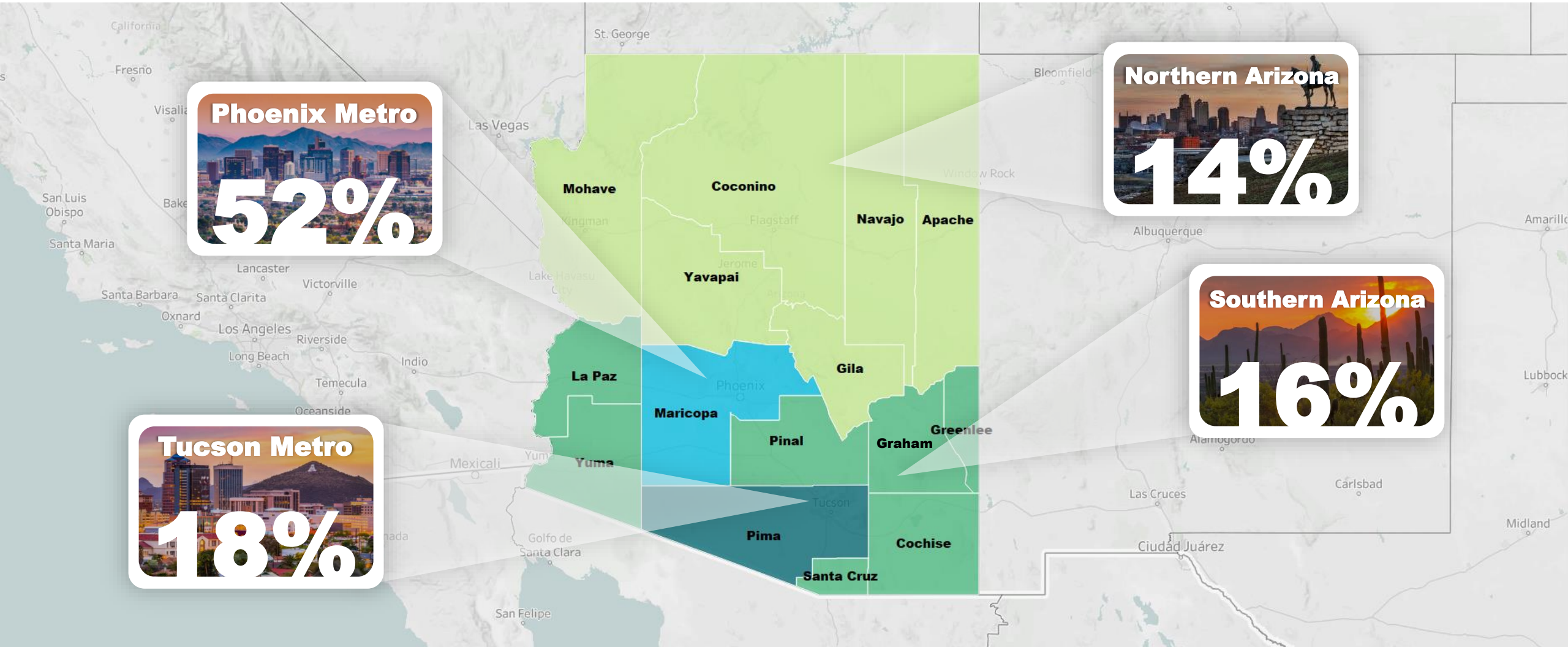
2023 Release
Interviews conducted between
Feb 3 – 11, 2023

2022 Release Interviews conducted
between Jan 18– 29, 2022



Median Length of Interview:
24:38 minutes

Geography Defined



Percent of completed interviews by geography among total sample of 1,250

Time Spent With Arizona Media



19:17 Total Time Spend with Media (hh:mm)
(18:30 in 2022)

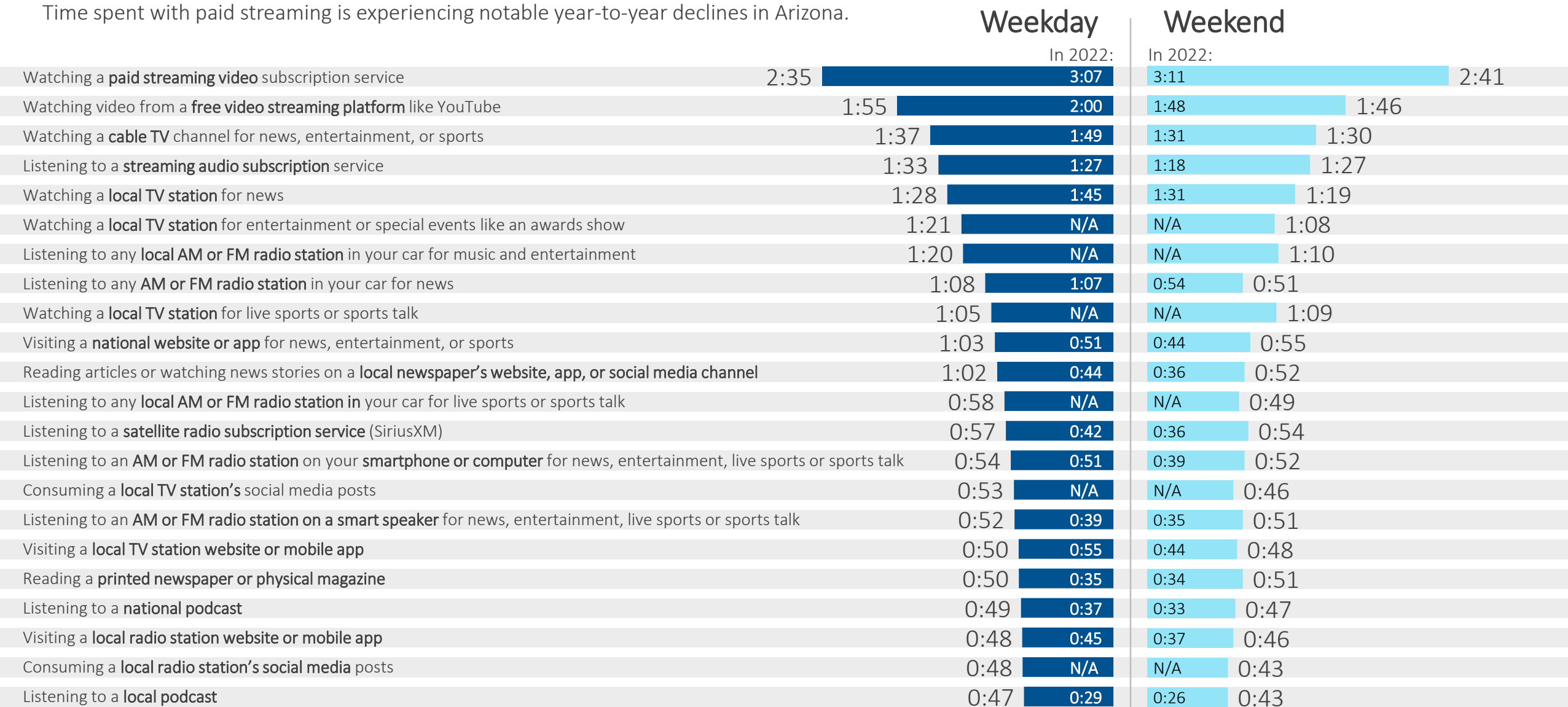
3:26 Car for music/news/sports talk, **1:46** via phone/smart speaker, **1:36** via web/social) **6:48** Total Local Radio Universe 

3:55 TV News/Sports/ET and Specials, **1:44** web/mobile/social) **5:39** Total Local TV Universe 

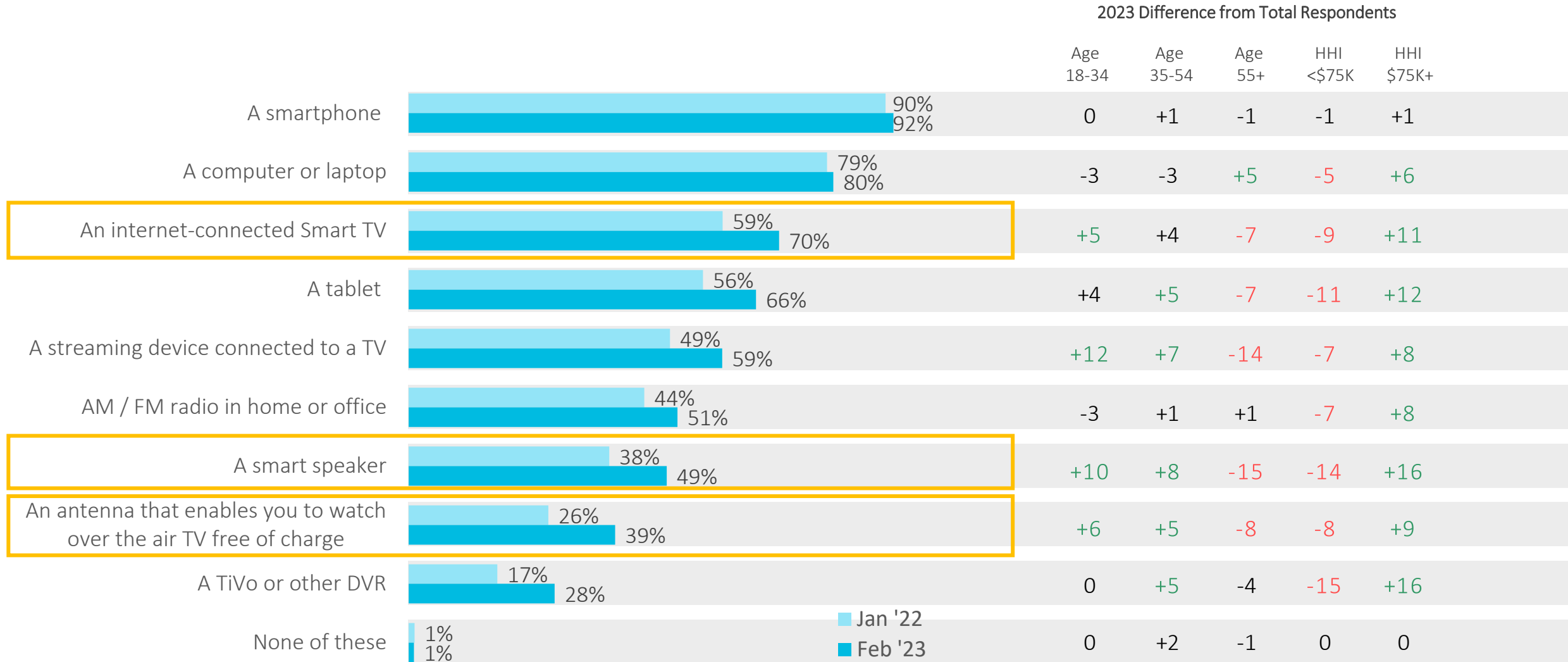
2:35	In 2022: 3:07 vs. 2022 	Streaming video subscription (Paid)
1:55	2:00 	Streaming video subscription (Free)
1:52 (0:50 Print, 1:02 Online)	1:20 	Newspaper or magazine (print or online)
1:37	1:49 	Cable TV
1:37 (0:49 National, 0:47 Local)	1:06 	Podcasts
1:33	1:27 	Streaming audio subscription
1:03	0:51 	National website or app
0:57	0:42 	Satellite radio

How Arizona Consumers Segment Media Use By Category

Time spent with paid streaming is experiencing notable year-to-year declines in Arizona.

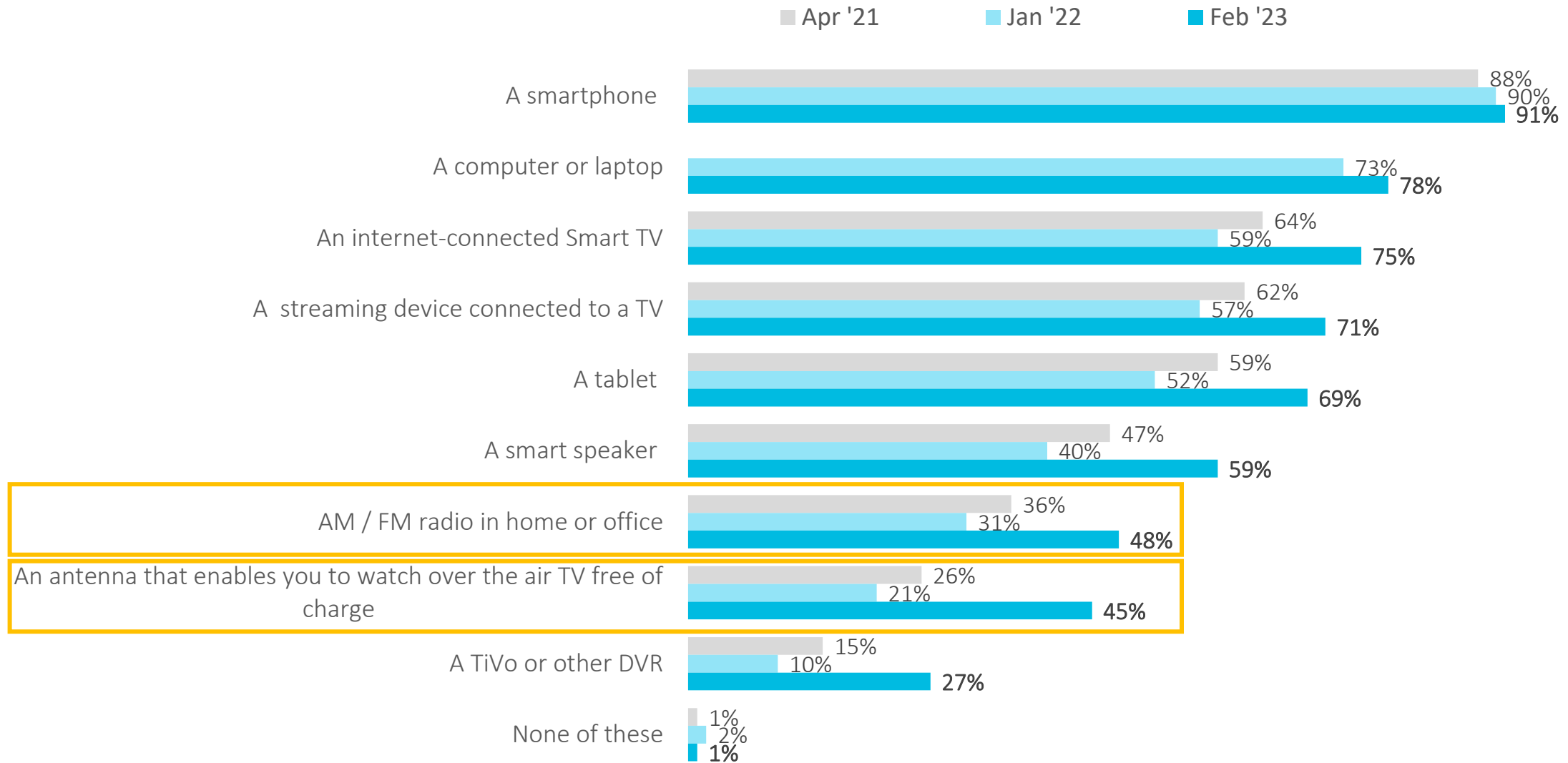


Which Media Devices Do Arizona Consumers Own?



Which Media Devices Do Arizona Consumers Own?

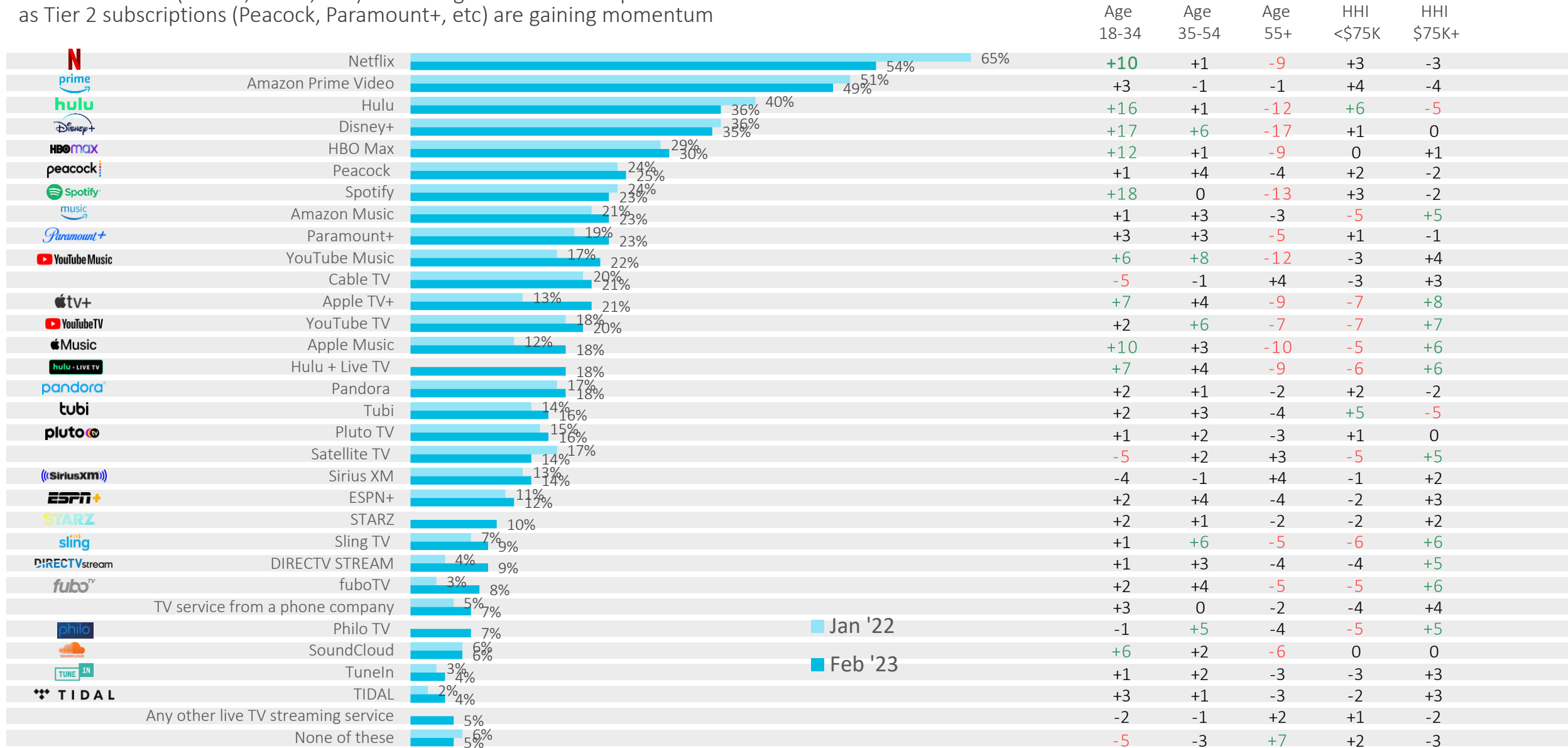
Ages 18-34



Current Media Subscriptions in Arizona

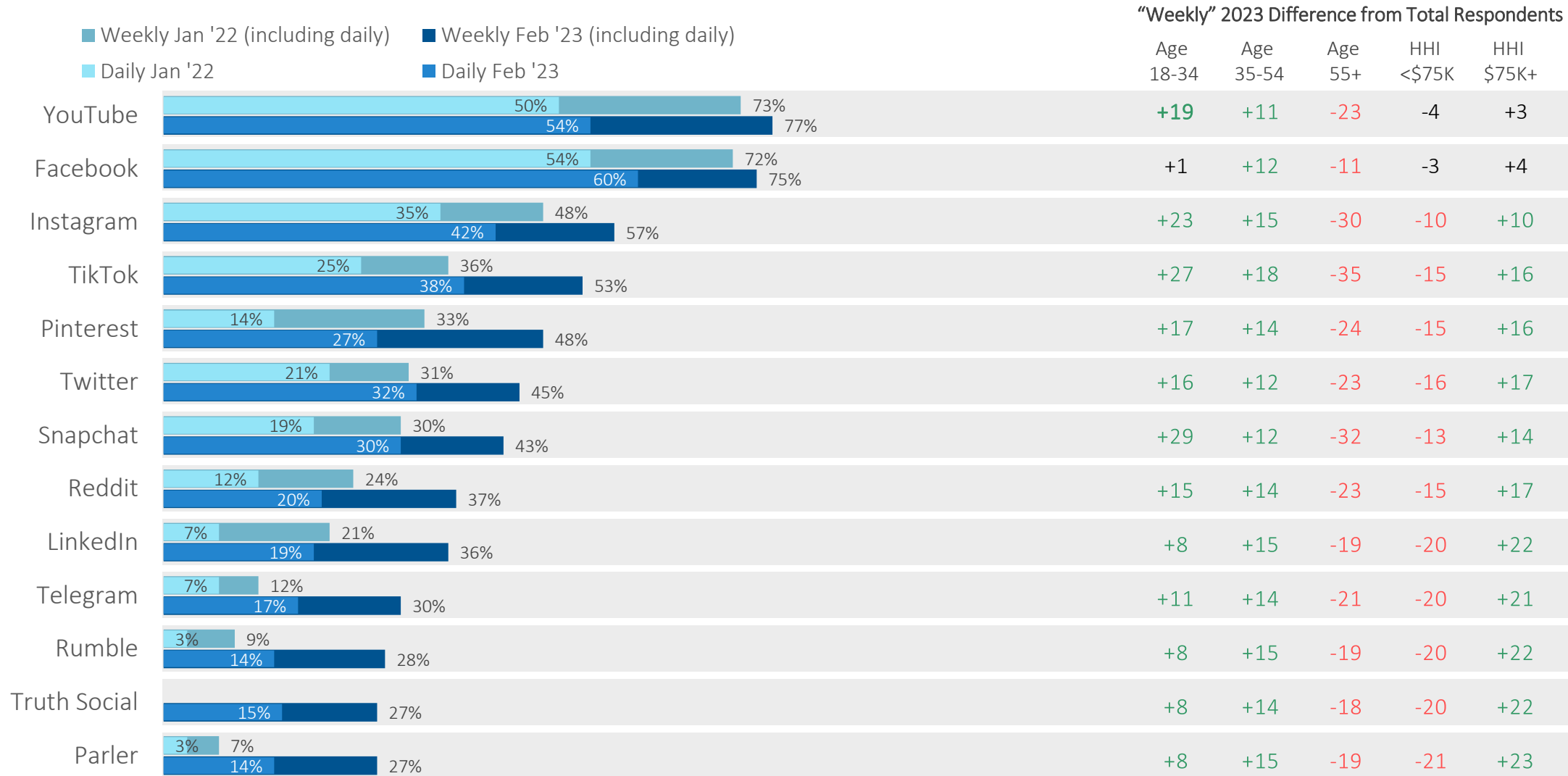
Tier 1 streamers (Netflix, Prime, etc.) are seeing declined subscription rates in Arizona vs. 2022 as Tier 2 subscriptions (Peacock, Paramount+, etc) are gaining momentum

2023 Difference from Total Respondents



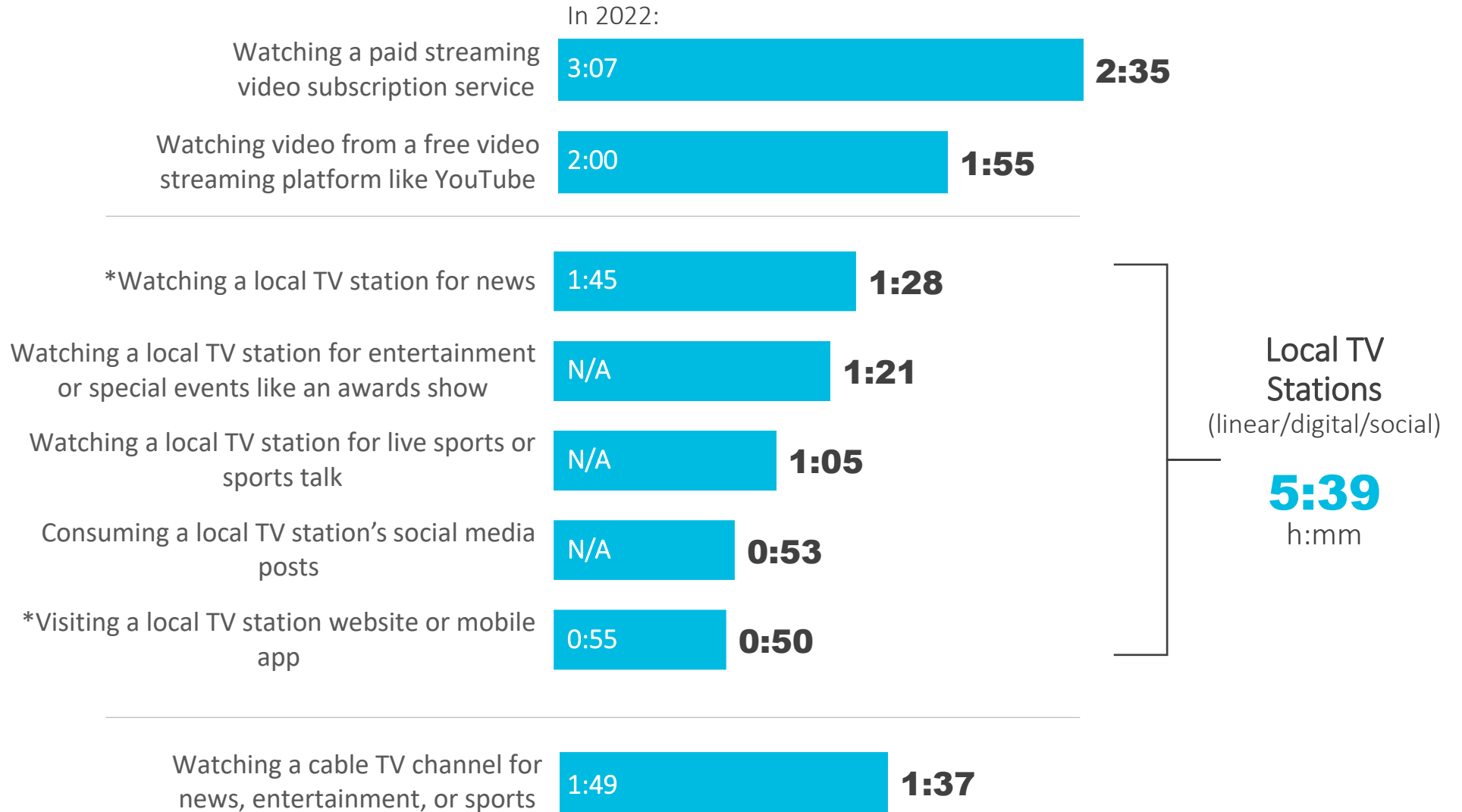
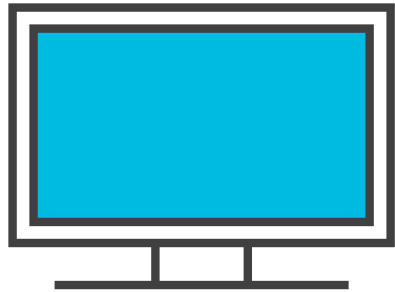
Social Media Use

YouTube is now used by more than 3 in 4 (77%) of Arizonans on a weekly basis. Every social media platform is experiencing increased weekly usage with rather substantial daily increases as well.



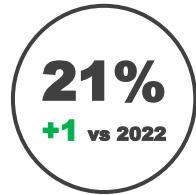
Daily = 1-2% sum
Weekly = 1-4% sum

Digging Into Weekday Arizona TV usage

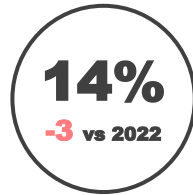


* Worded differently in 2022 study

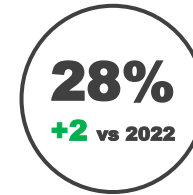
The evolving cable TV landscape in Arizona



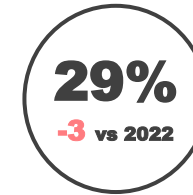
Consumers with Traditional Cable



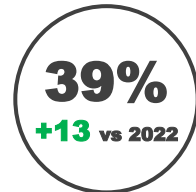
Consumers with Satellite Cable TV



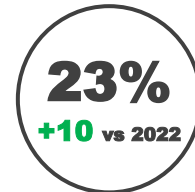
Consumers with Live Streaming Cable TV



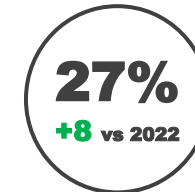
Consumers with No Cable and No antenna



Consumers who own/use an antenna for local TV

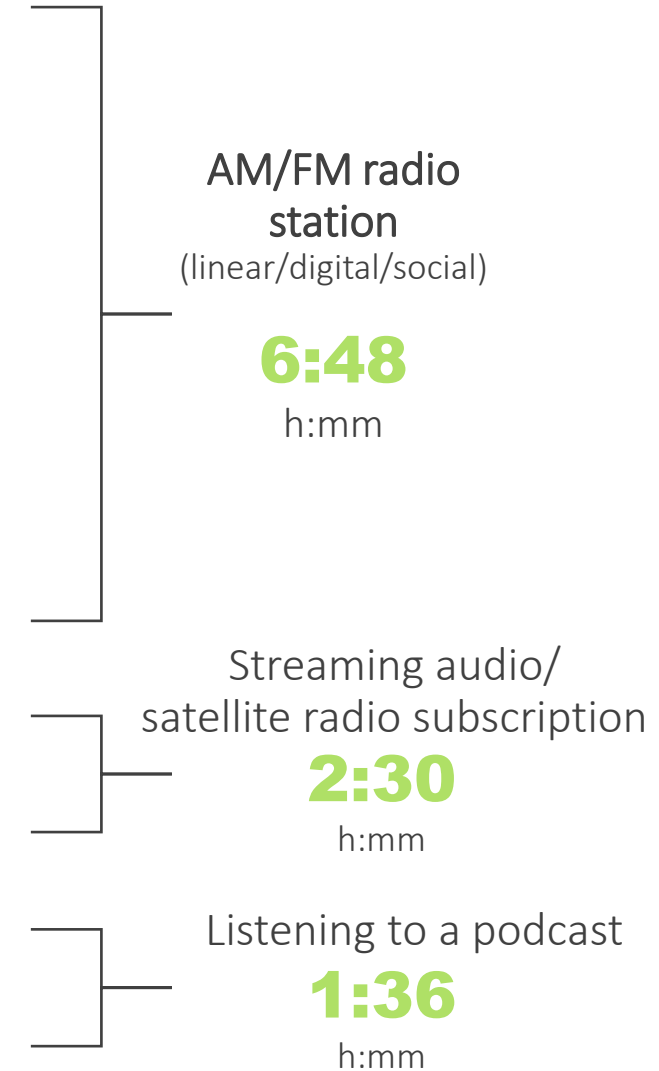
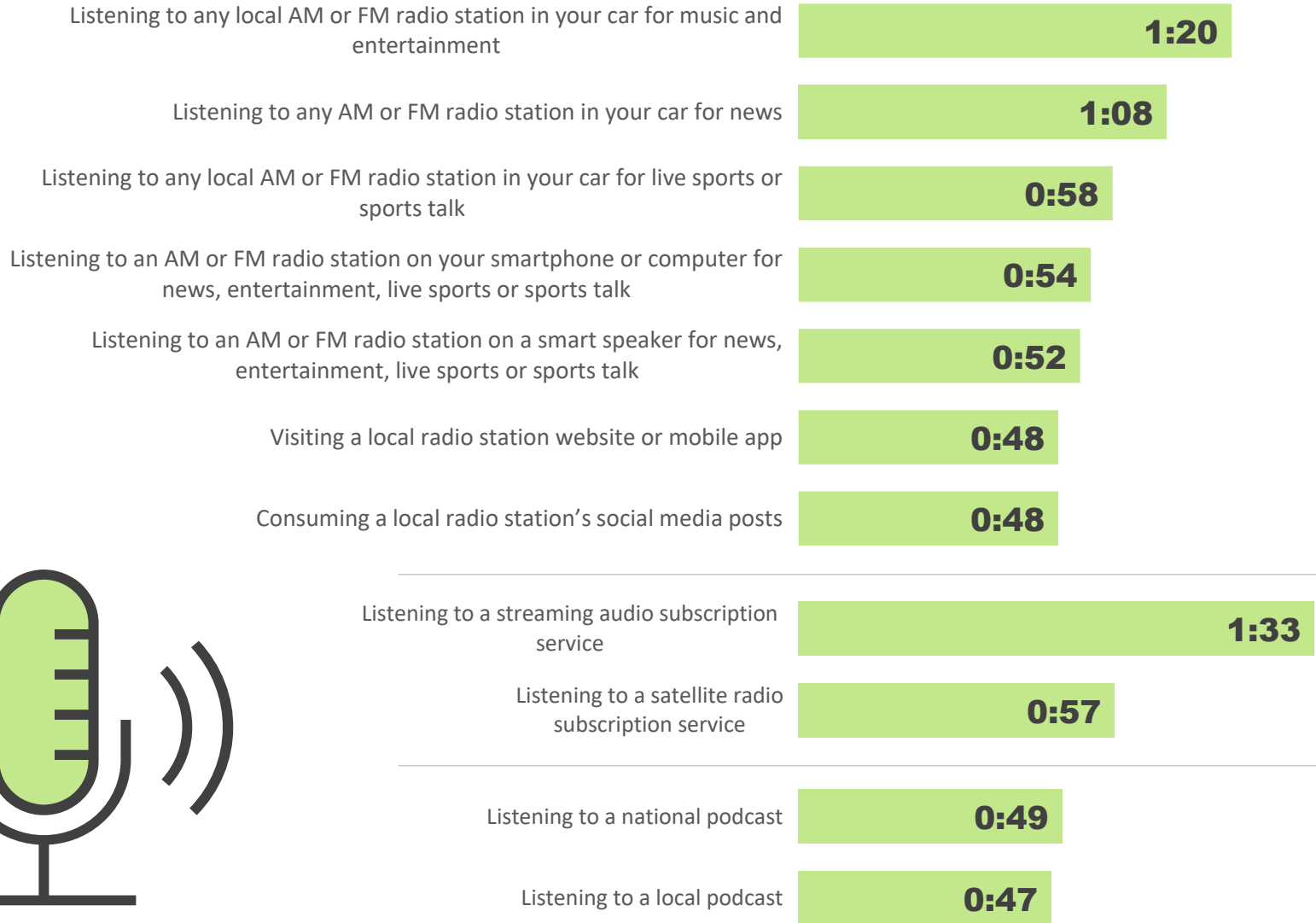


Consumers who plan to buy an antenna in the next year



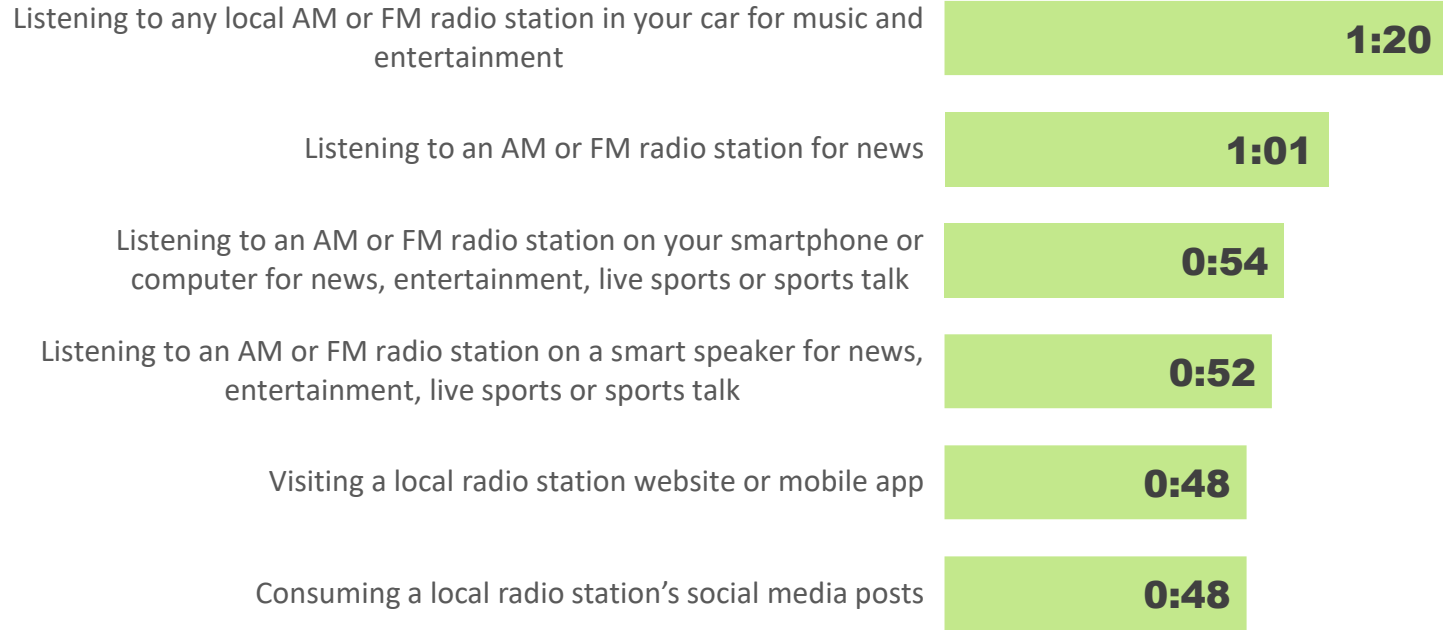
Consumers with only an antenna (No Broadband, no Cable)

Digging into Weekday Arizona audio usage



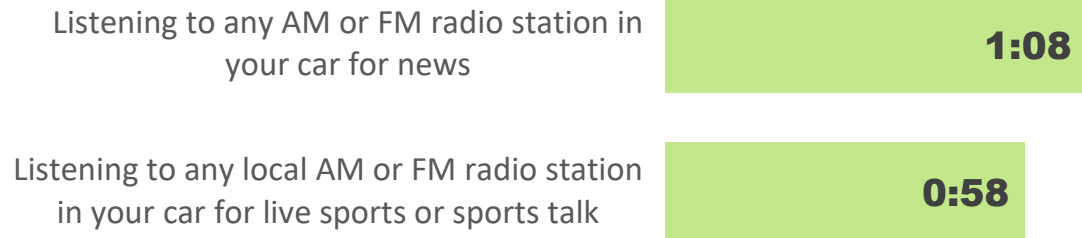
Arizona Local Radio Usage: Car vs Everywhere

■ Weekday



Radio Anywhere
(linear/digital/social)

5:47
h:mm

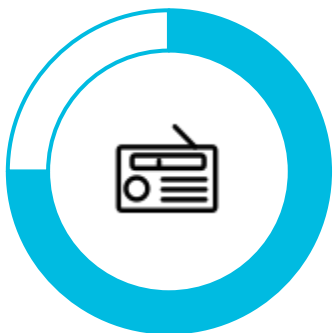


Radio in Car

2:06
h:mm

How are people listening to local radio in Arizona?

LOCAL RADIO IS CONSUMED ON MORE PLATFORMS



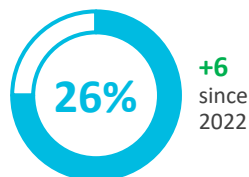
75% **Terrestrial**
 (Home: tabletop radio or stereo system. Car: AM/FM receiver or in-dash entertainment system)



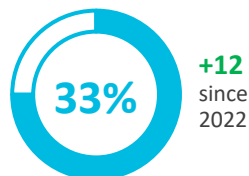
59% **Streaming**
 (Smartphone, Bluetooth, Smart Speaker, or Computer)



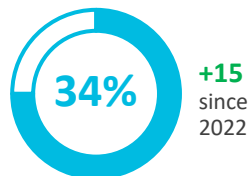
From an AM or FM receiver or stereo in a car



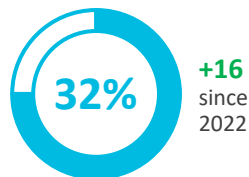
From a clock or table-top radio



Directly from a smartphone

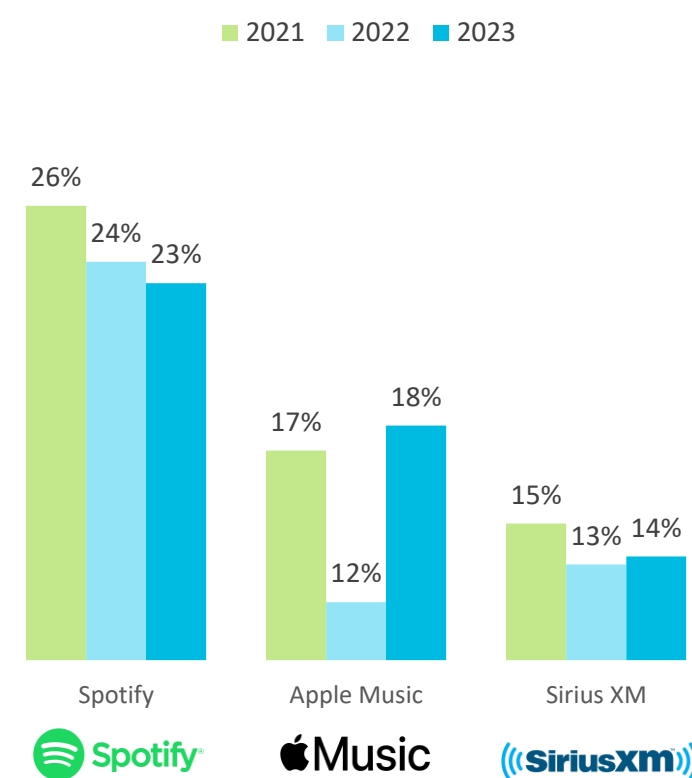


From smartphone to Bluetooth speaker



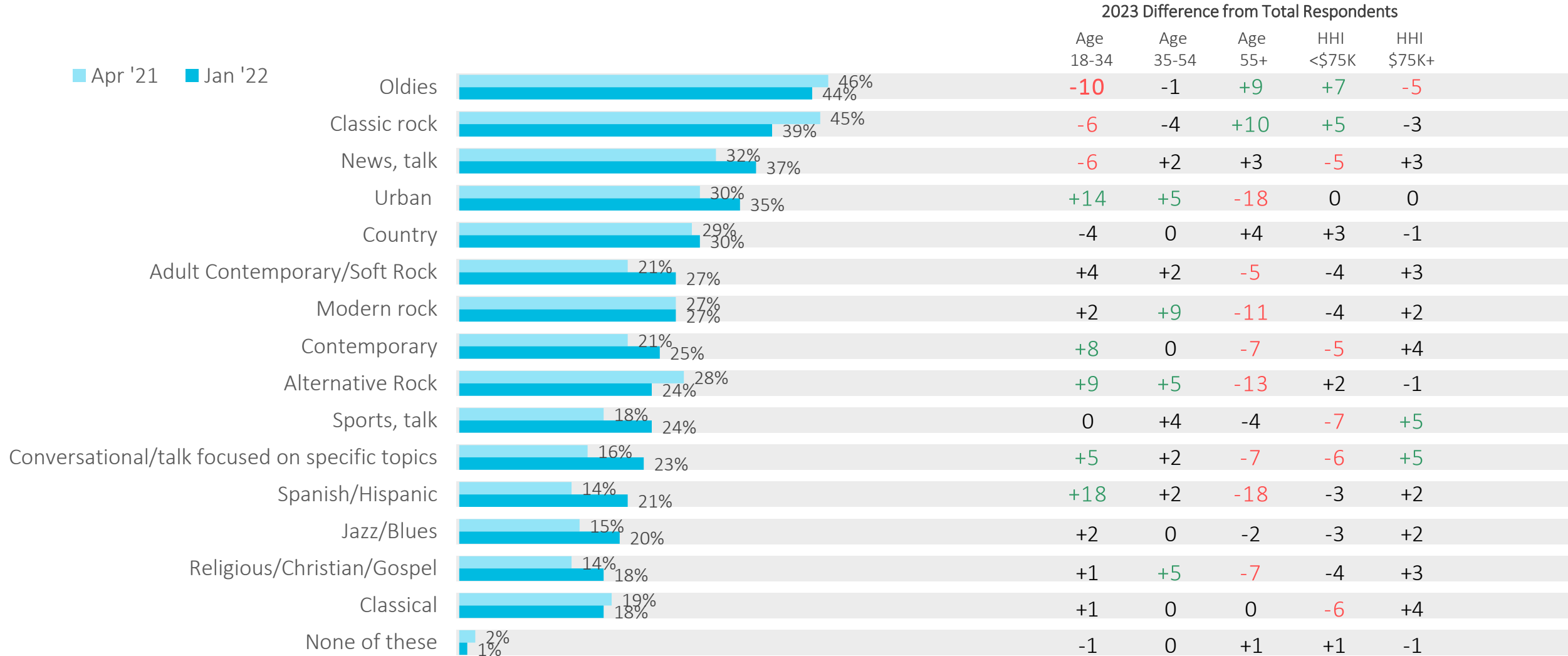
From a computer

STREAMING AUDIO SUBSCRIPTION TRENDS

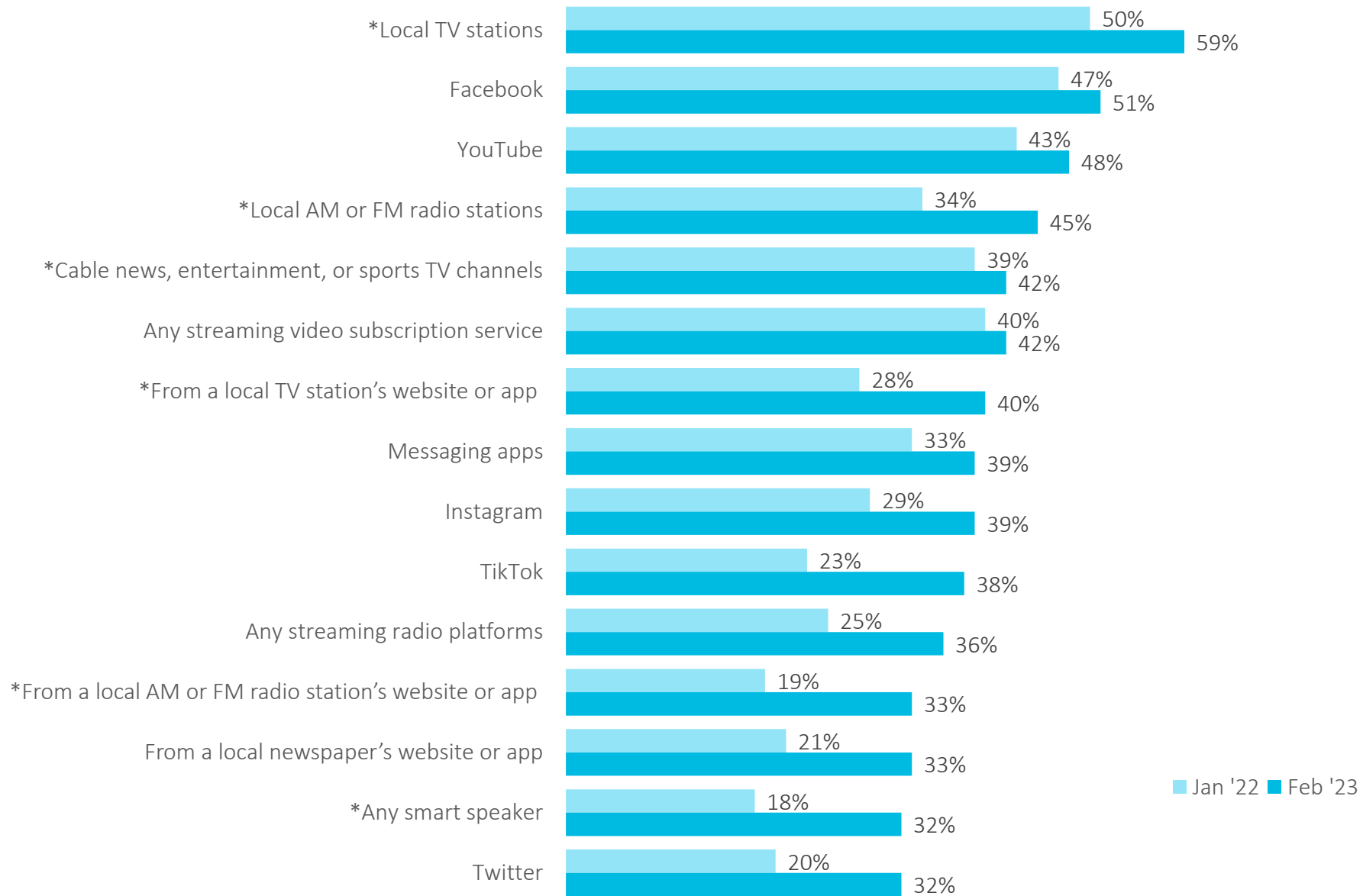


Radio Formats Most Listened To in Arizona

Format rank order remains intact vs. 2022 with some notable decreases in the most preferred formats while genres like News, Talk, Urban, Country, Adult Contemporary and others see increased preference.



Daily Sources for News and Information in Arizona

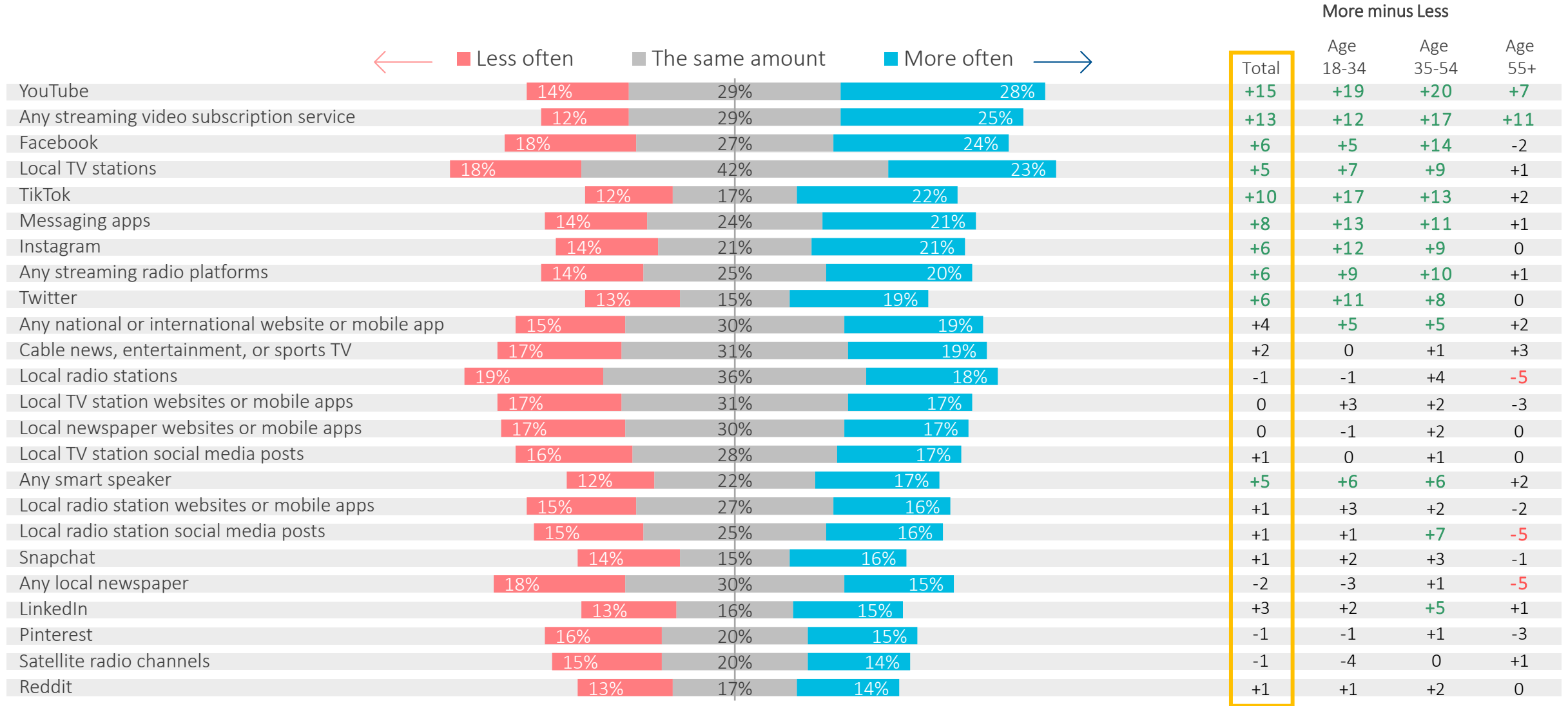


* Phrased differently in Jan '22

S16: What are some of the different sources you currently rely on for news and information in a typical week?

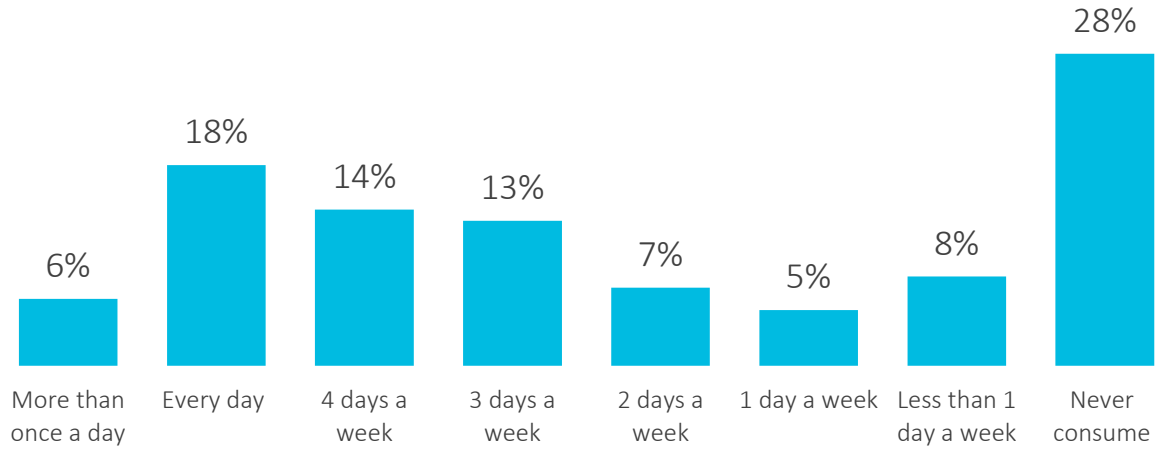
News Consumption Changes in Arizona Since January 2022

Many Arizonans expect to maintain their high levels of media consumption while anticipating even more via streaming and social.

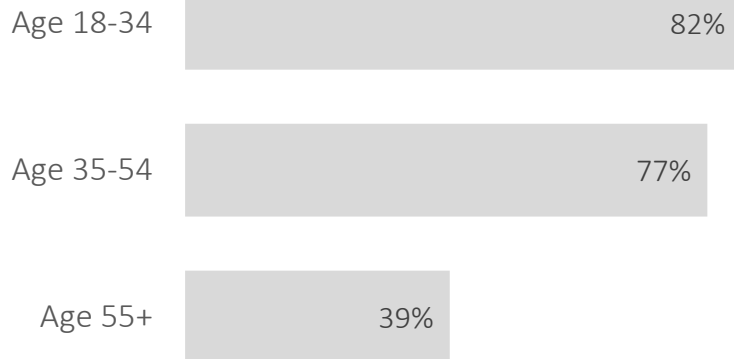


Local News Digital Consumption

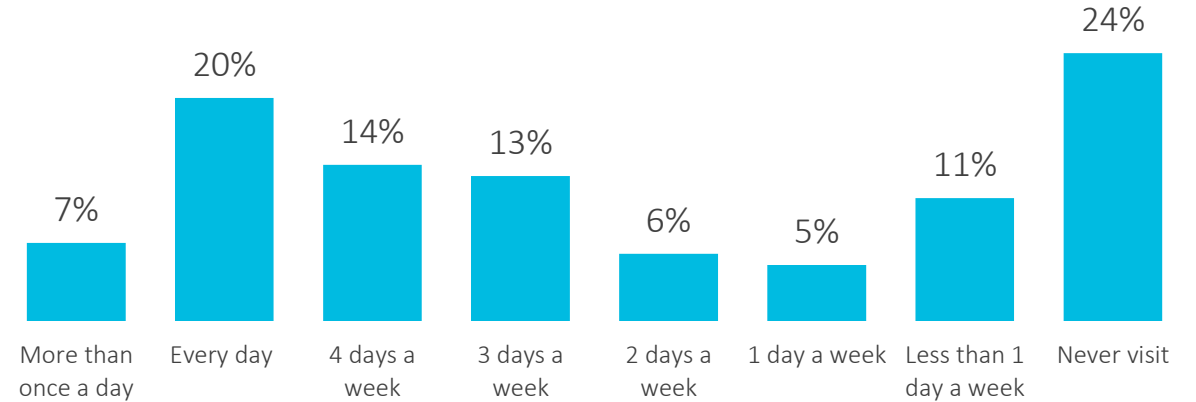
Social Media



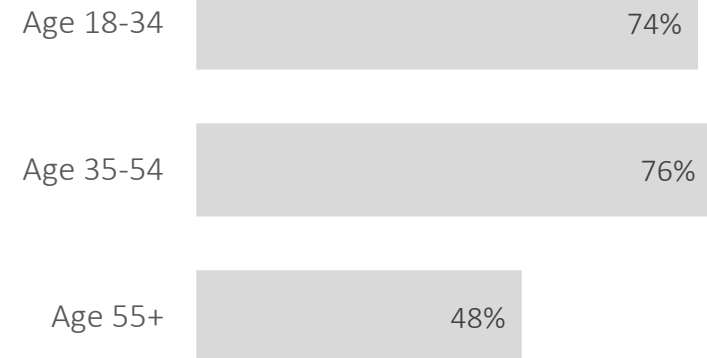
Weekly Total: 64%



Web and App



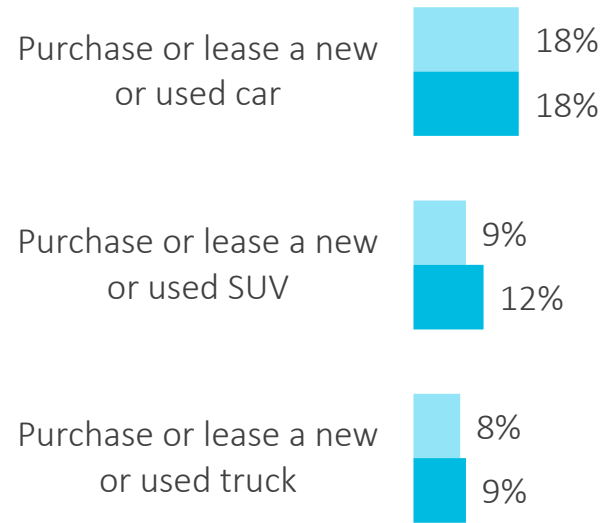
Weekly Total: 65%



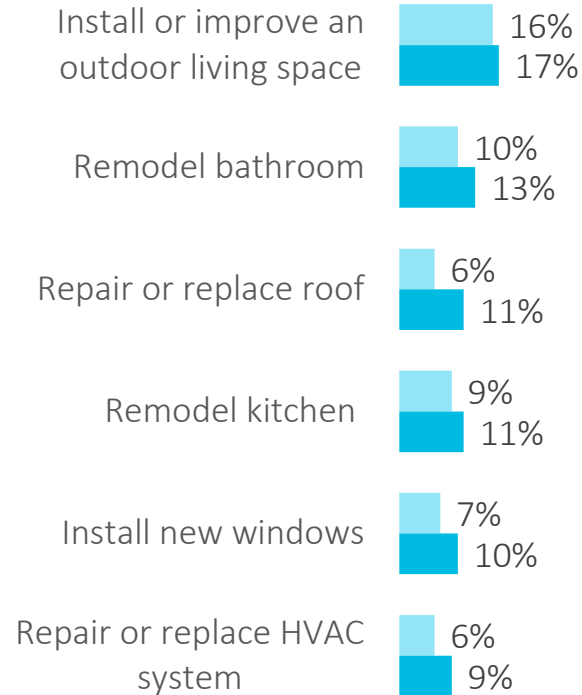
Products and Services: Planning To Do In The Next Year

Jan '22 Feb '23

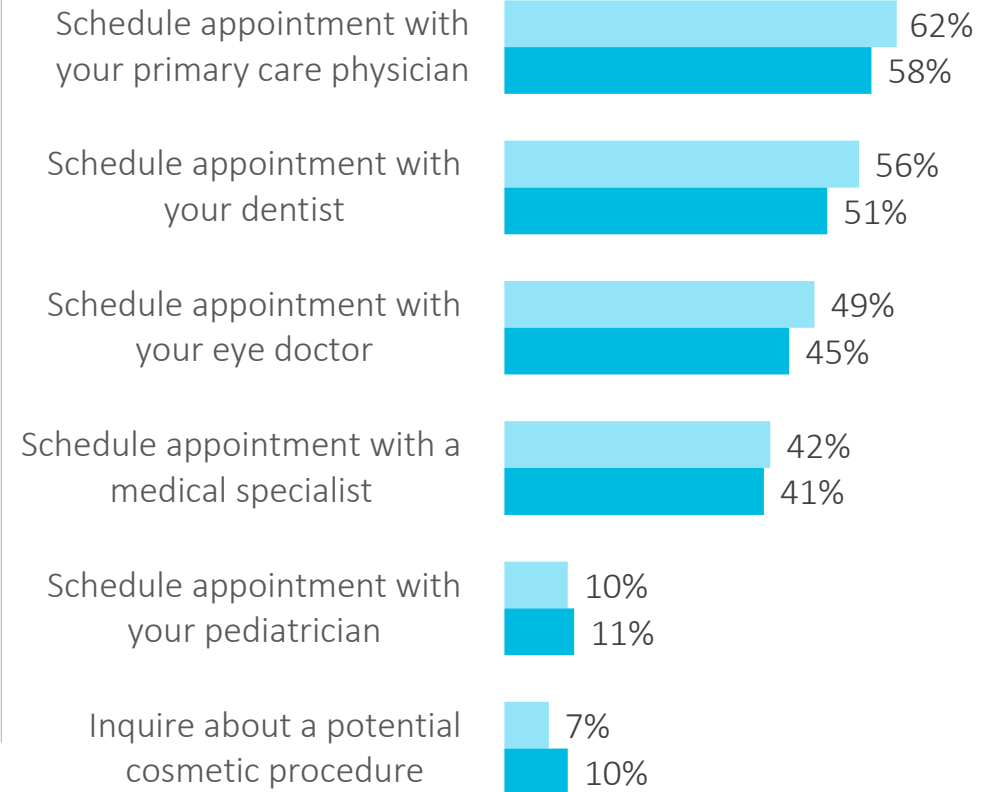
Automotive



Home Services



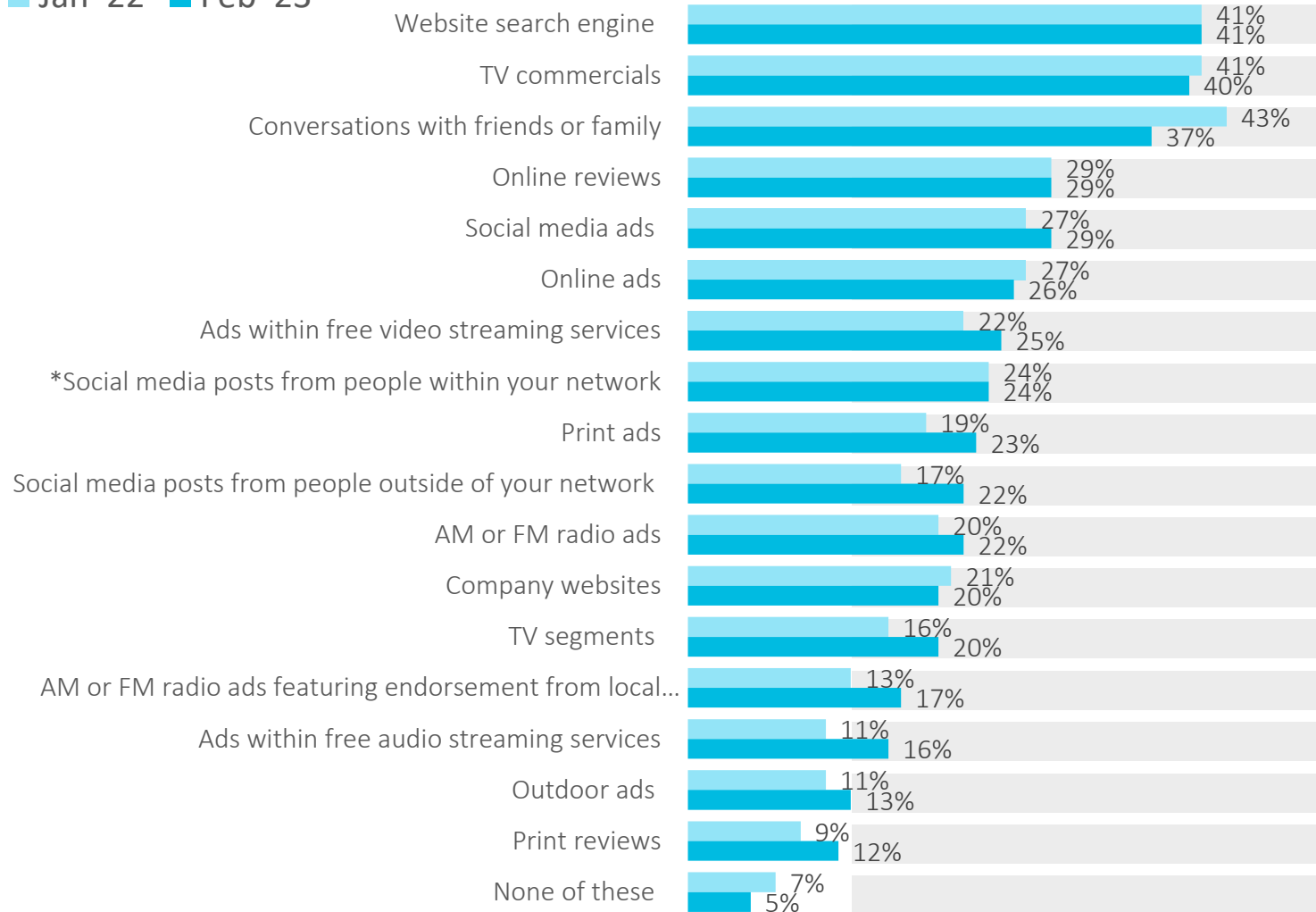
Healthcare



Sources To Find Out About New Products or Services

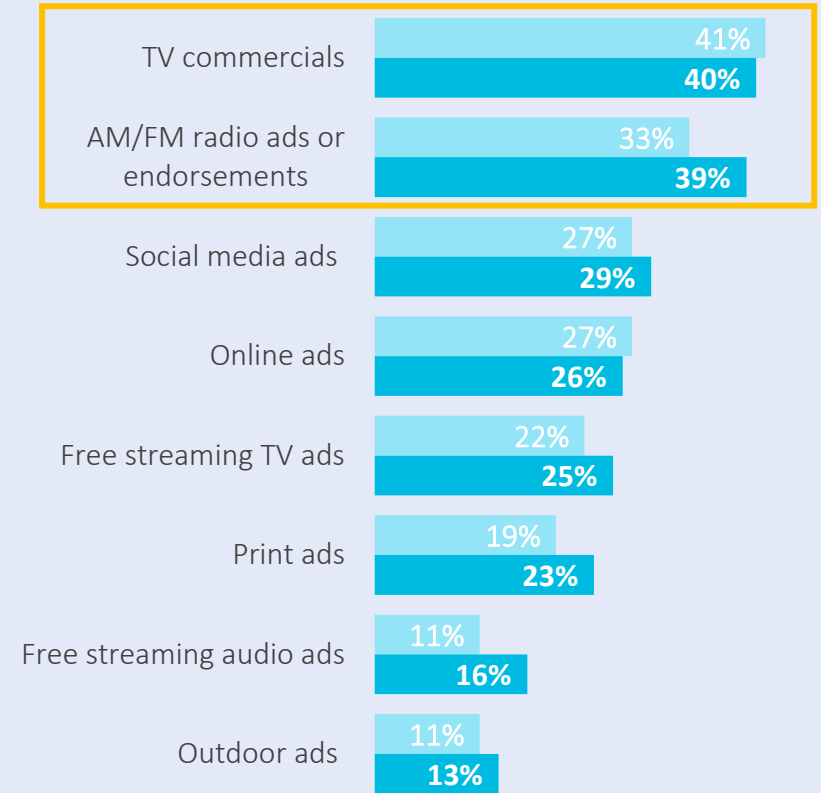
Arizona consumers point to TV and Radio as their top two most preferred ways to learn about new products or services. Radio is seeing a significant bump +6 over last year.

■ Jan '22 ■ Feb '23



TOP PAID: DISCOVERING NEW PRODUCTS & SERVICES

■ Jan '22 ■ Feb '23





Arizona Broadcasters Association:
Television, Radio and
Media Landscape Study
2023