

Public Radio  
TECHSURVEY  
**2018**  
JACOBS MEDIA • PRPD

# Public Radio Navigates the Digital Revolution



# Methodology

- 53 U.S. public radio stations
- N = 22,552
- Interview dates: May 7 – May 29, 2018
- Most respondents are members of station databases. Some responses were gathered via station websites and/or social networking pages.
- All responses were collected online and weighted using Nielsen 2017 market population data.
- This is a web survey and does not represent all public radio listeners or each station's total audience.

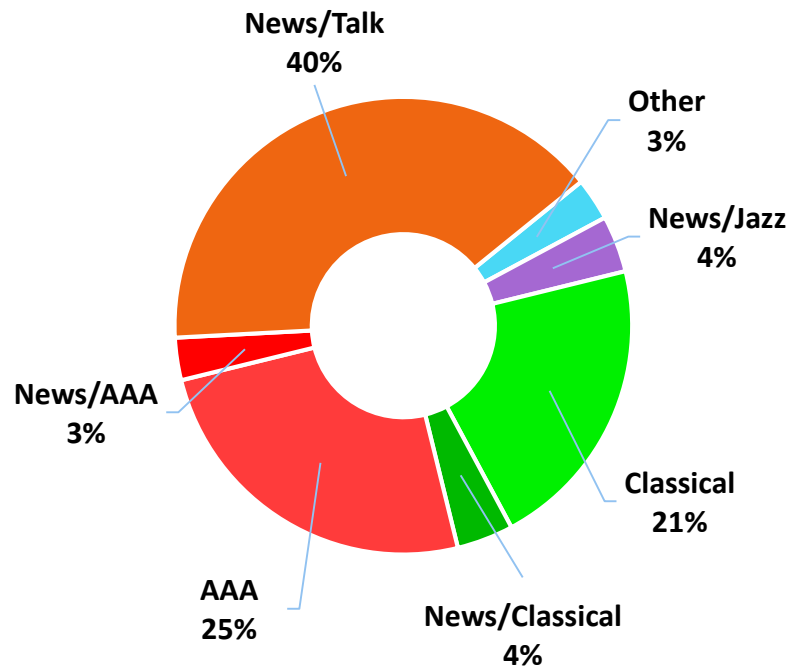


# The Sample

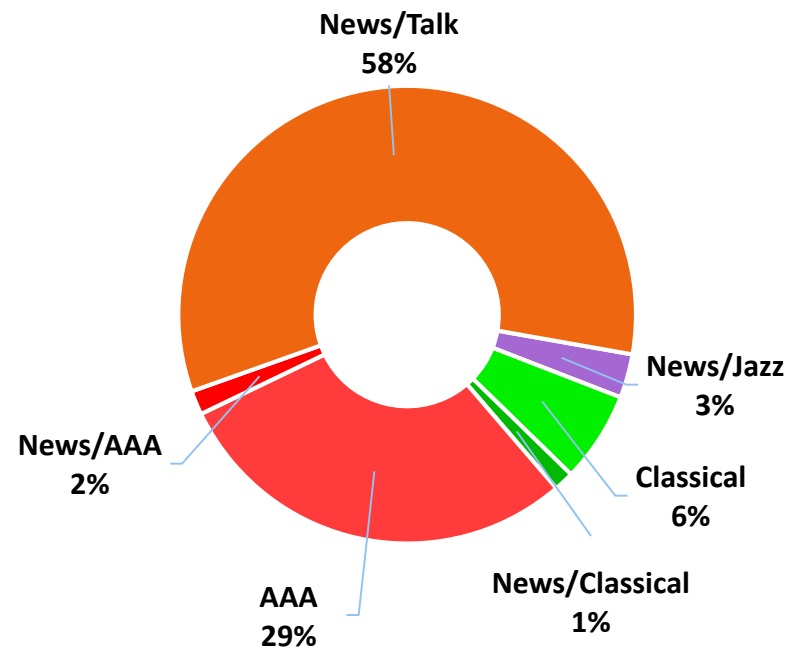


# Format Composition

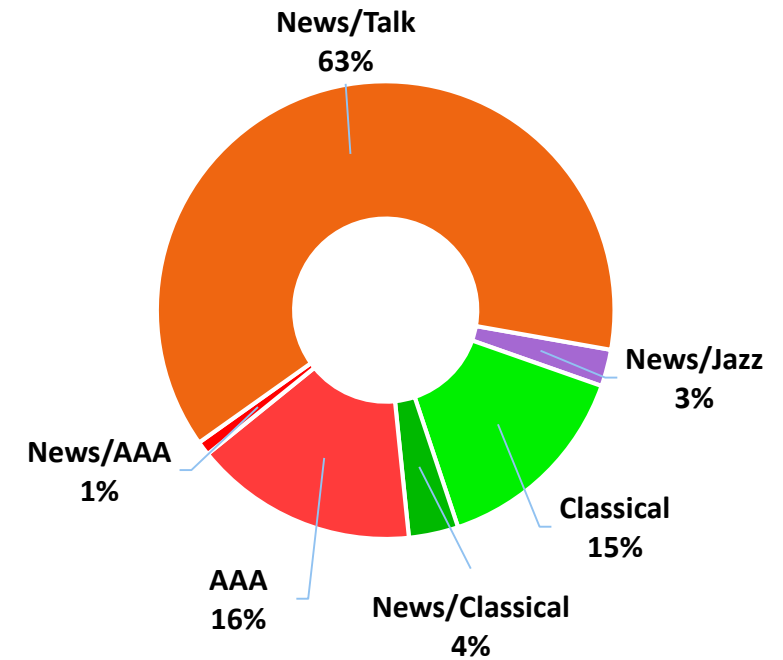
PRTS 2016



PRTS 2017

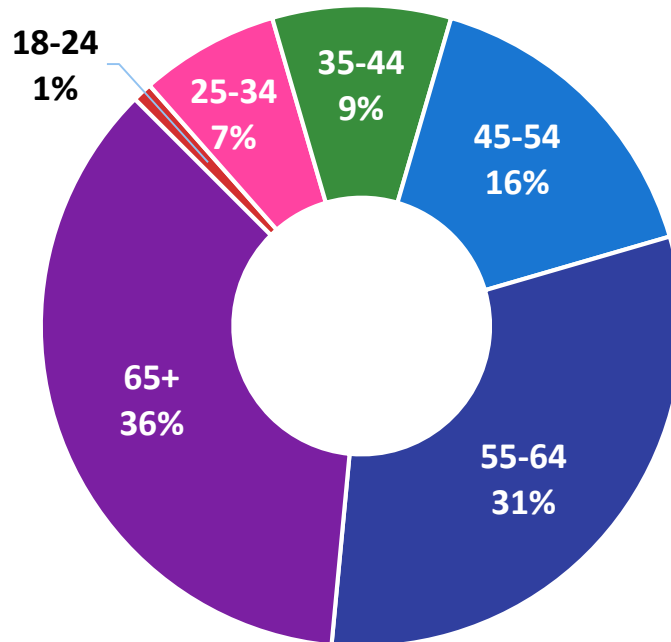


PRTS 2018



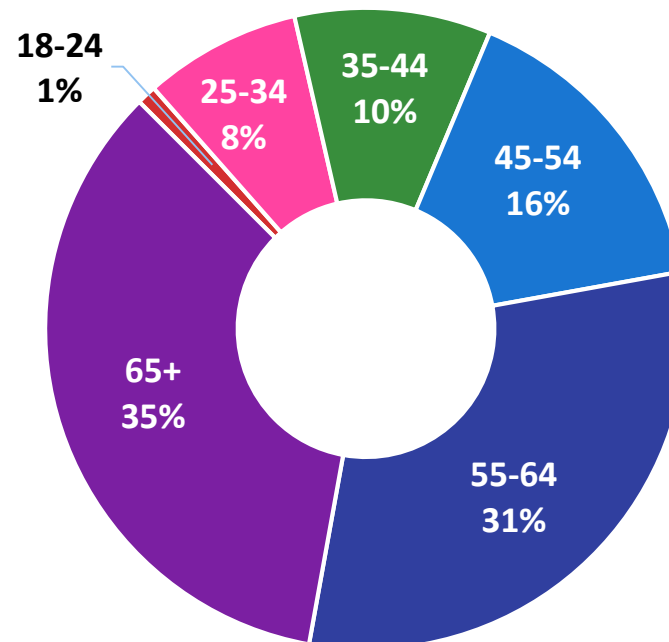
# Age

PRTS 2016



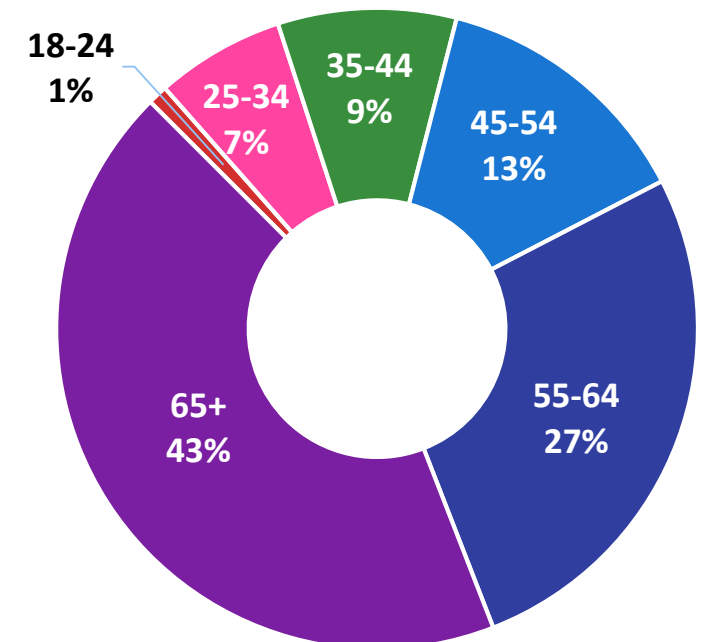
Average age: 58.1

PRTS 2017



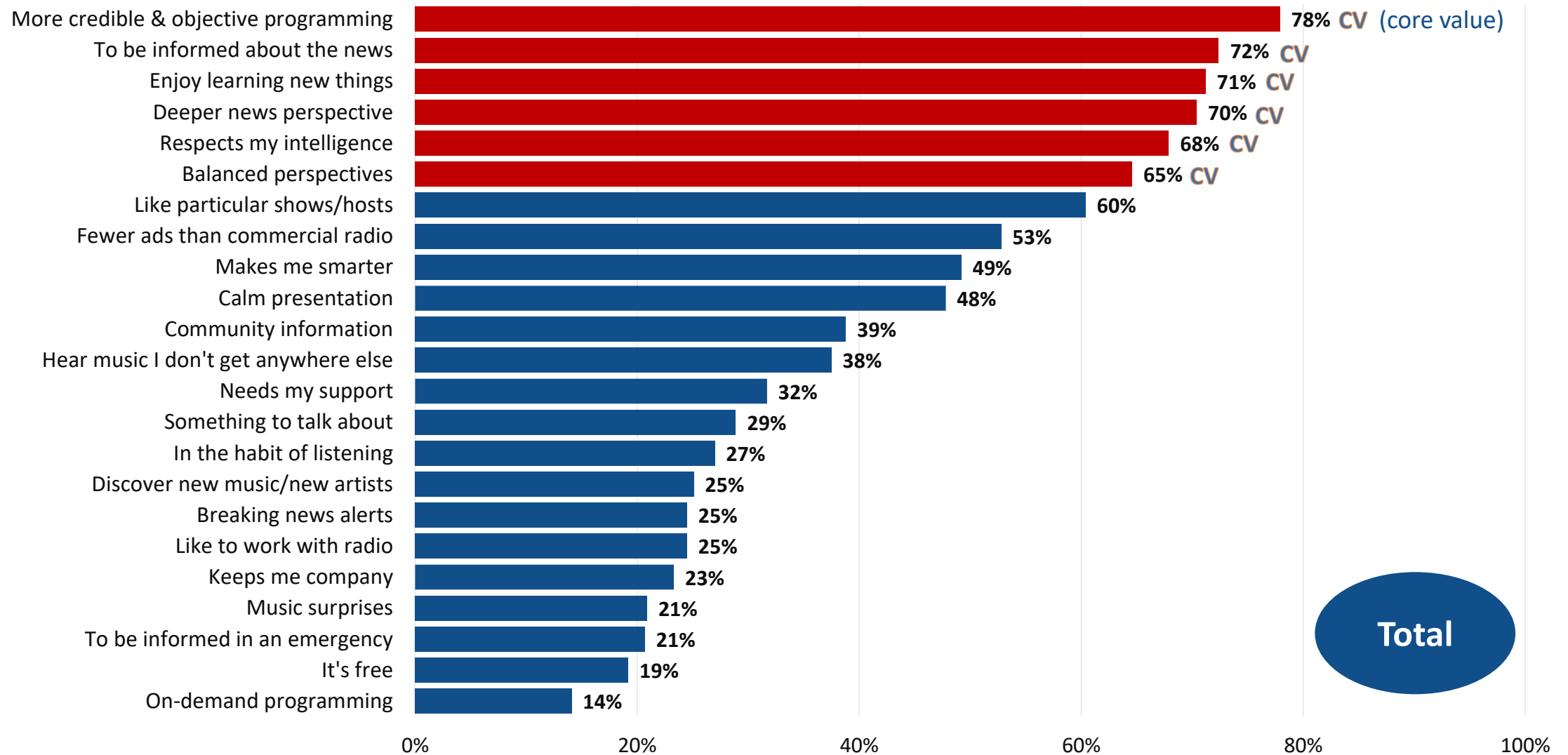
Average age: 57.6

PRTS 2018



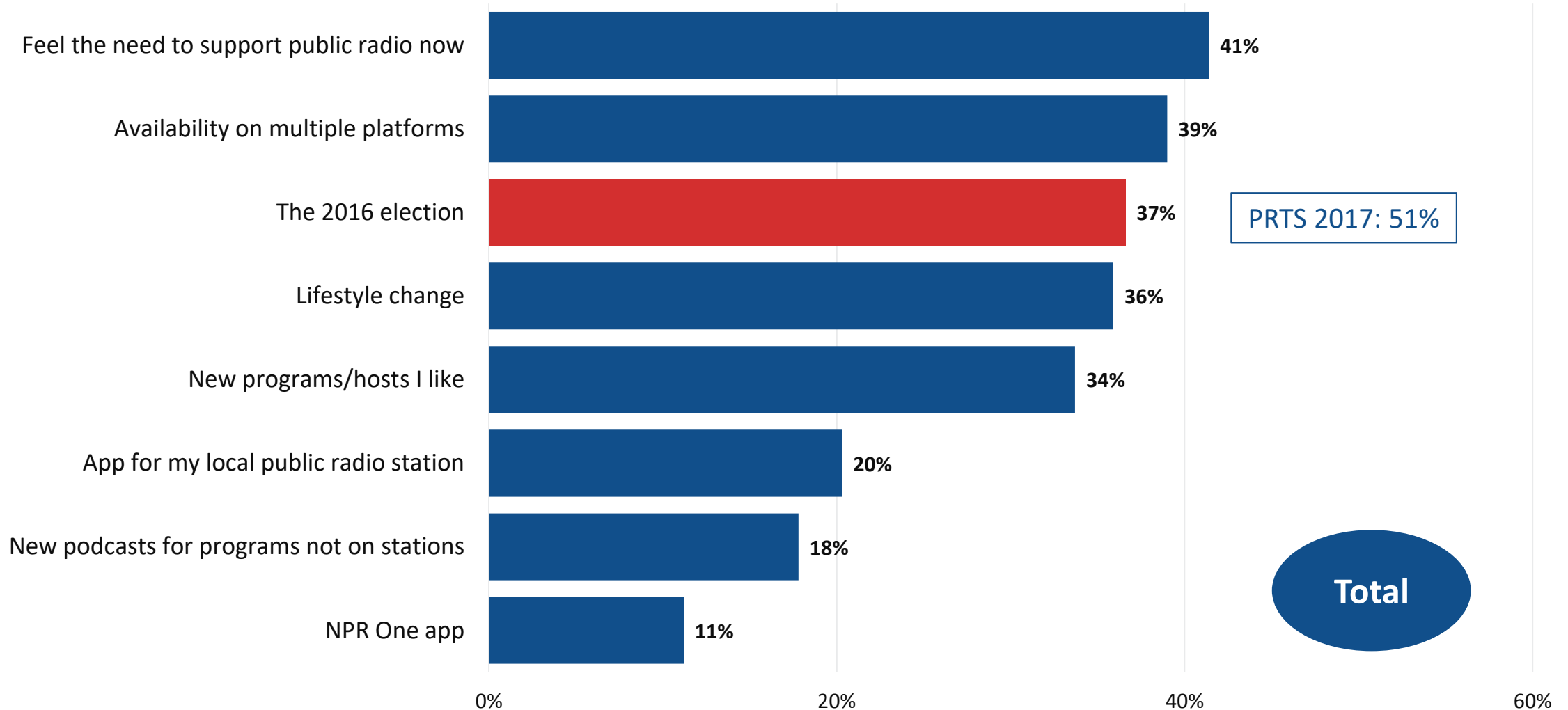
Average age: 59.7

# Main Reasons For Listening to Public Radio



Among those who listen to AM/FM radio,  
% who say this is a main reason they listen to public radio

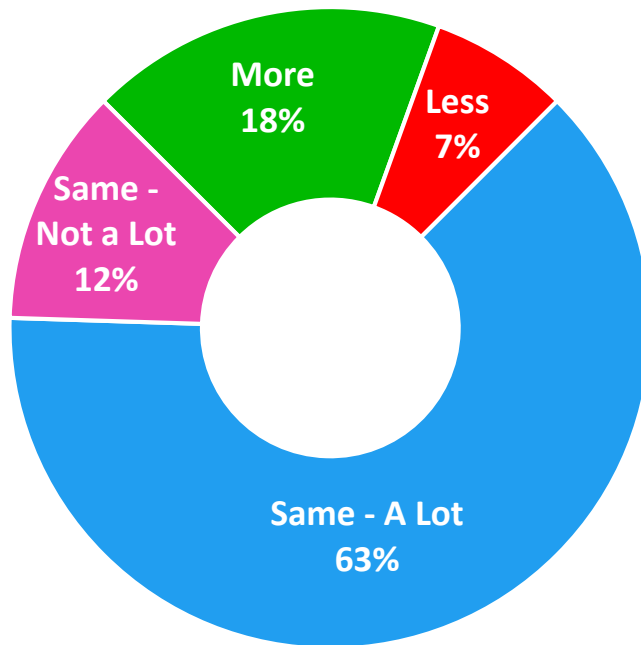
# Main Reasons For Listening to Public Radio More



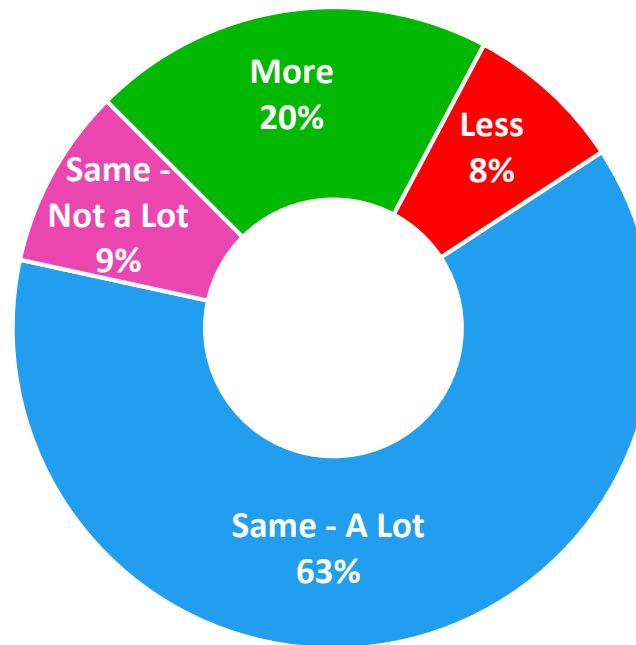
Among the 17% who say they are listening to public radio more in the past year,  
% who say this is a main reason they listen more

# Listening to Public Radio Less in the Past Year

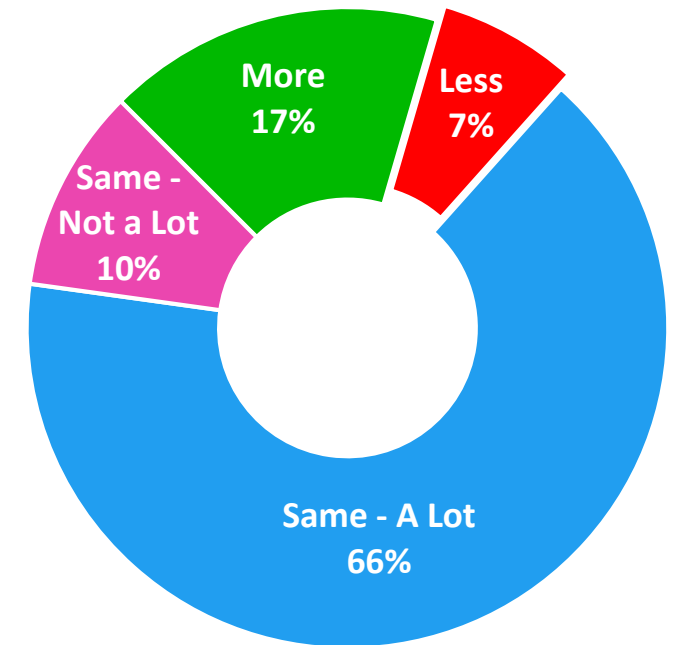
PRTS 2016



PRTS 2017



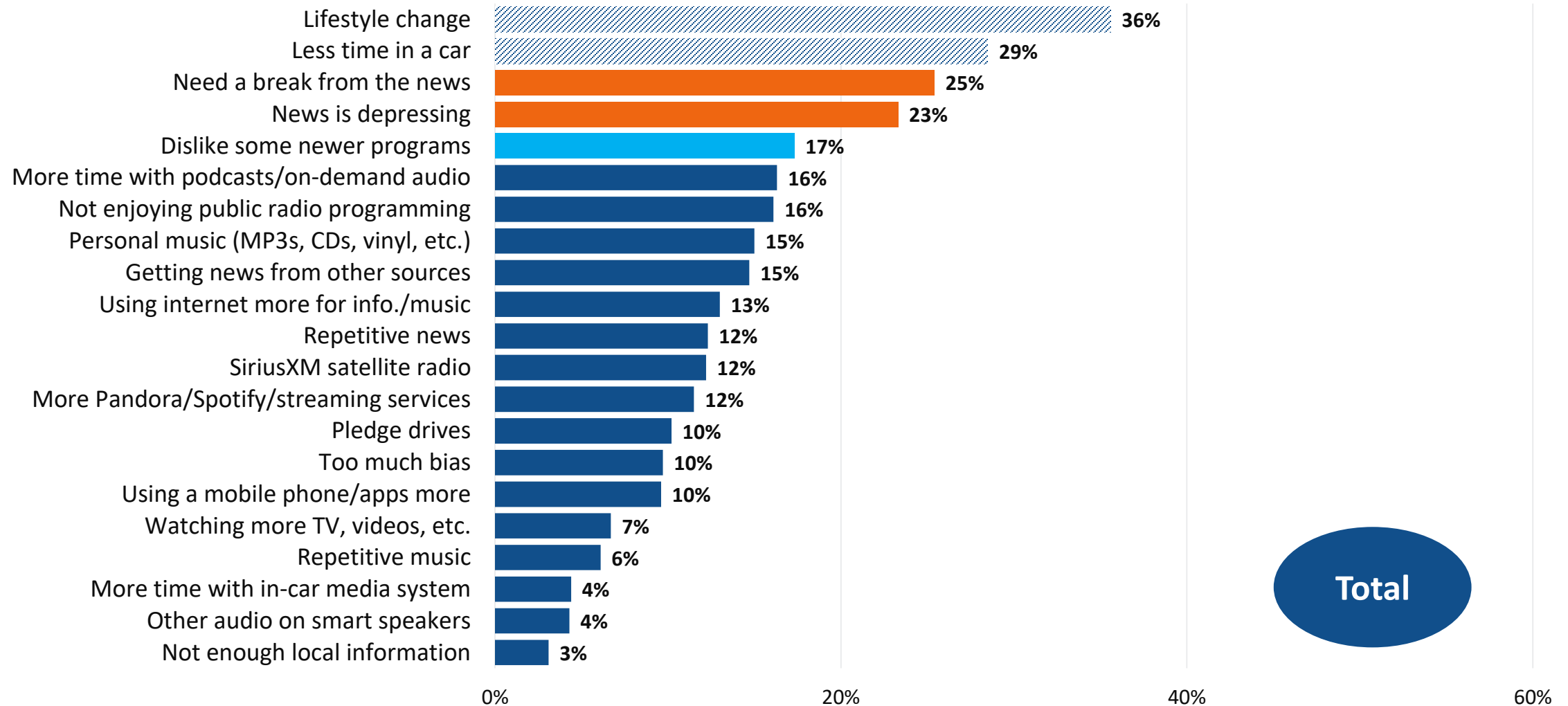
PRTS 2018



Among those who listen to AM/FM radio

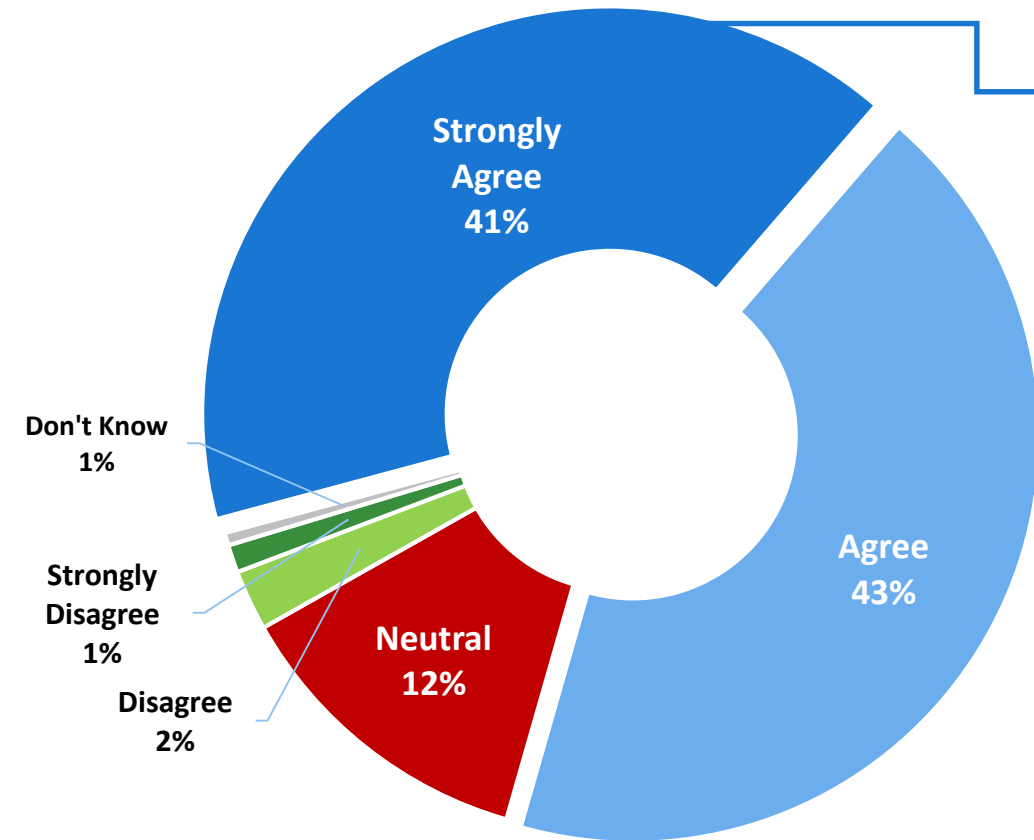


# Main Reasons For Listening to Public Radio Less

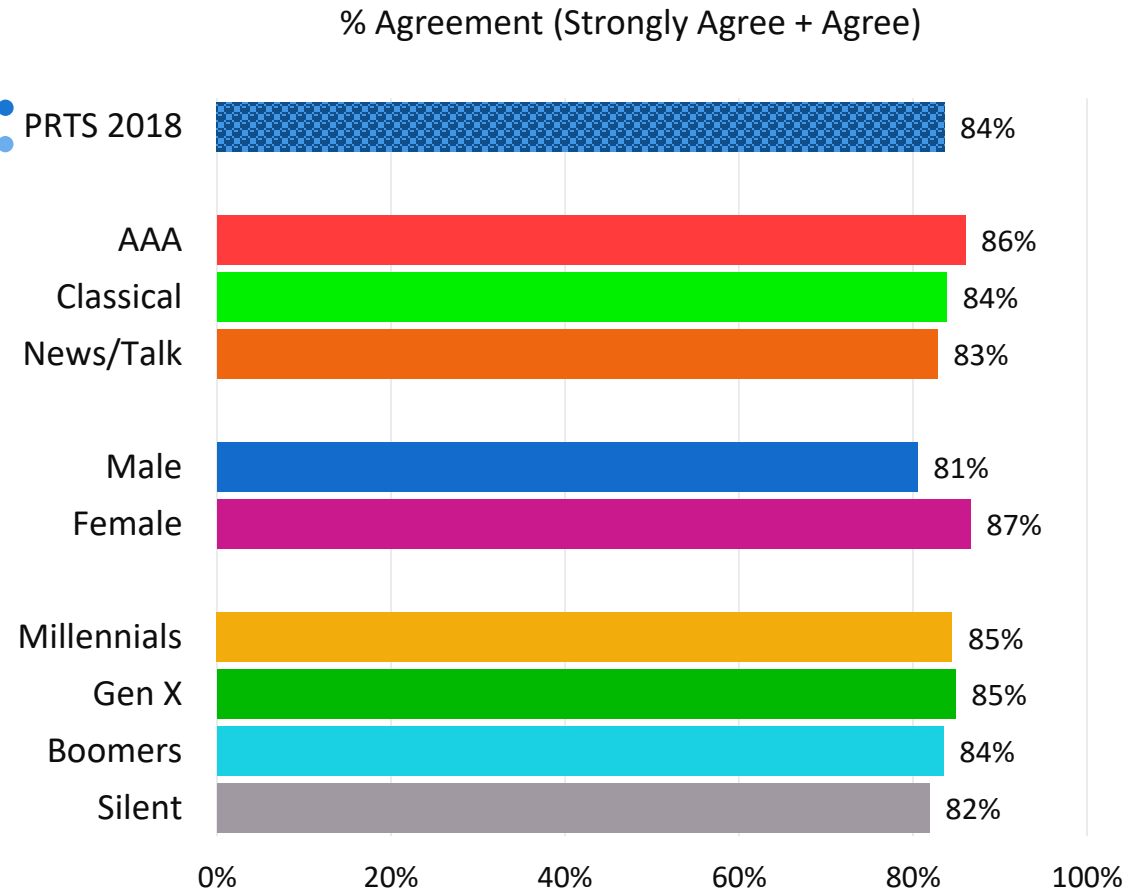


Among the 7% who say they are listening to public radio less in the past year,  
% who say this is a main reason they listen less

# The Large Majority of Listeners Feel Connected to Their Home Station



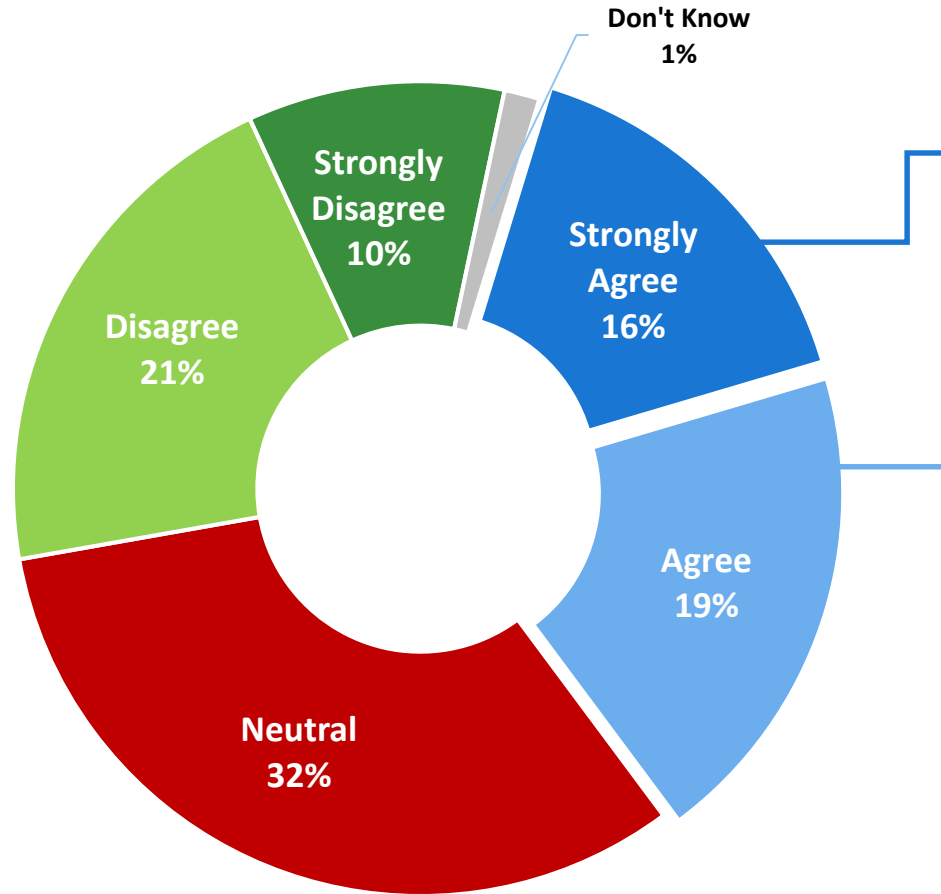
*"I really feel a sense of connection to (home station)"*



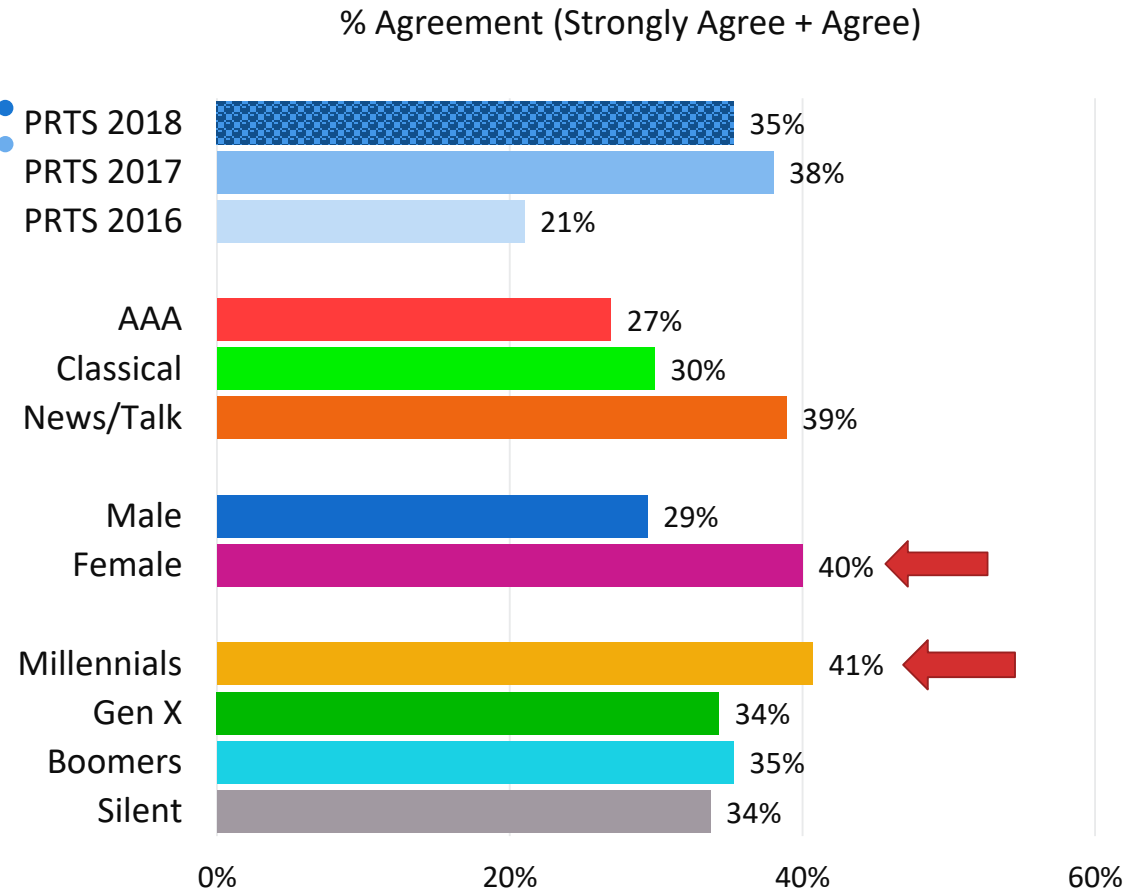
# The Trump Effect: Impact of Fake News



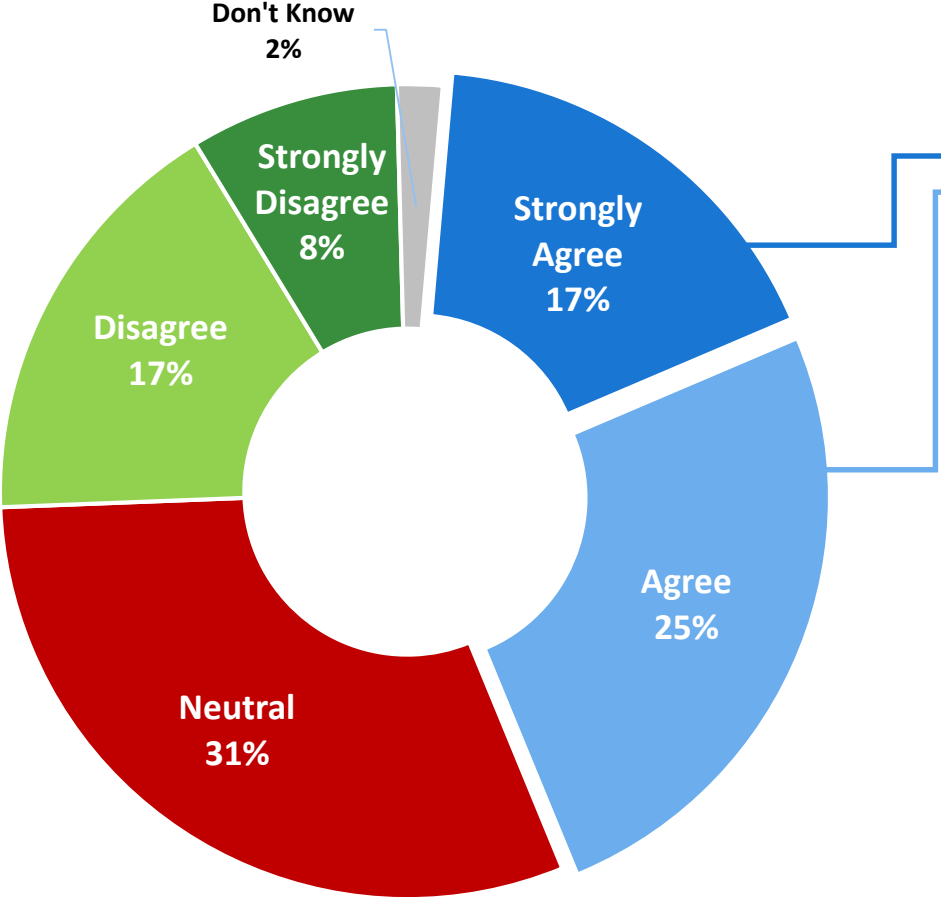
# The 2016 Election Is Still a Strong Driver of Increased Public Radio Listening, Particularly Among Females and Millennials



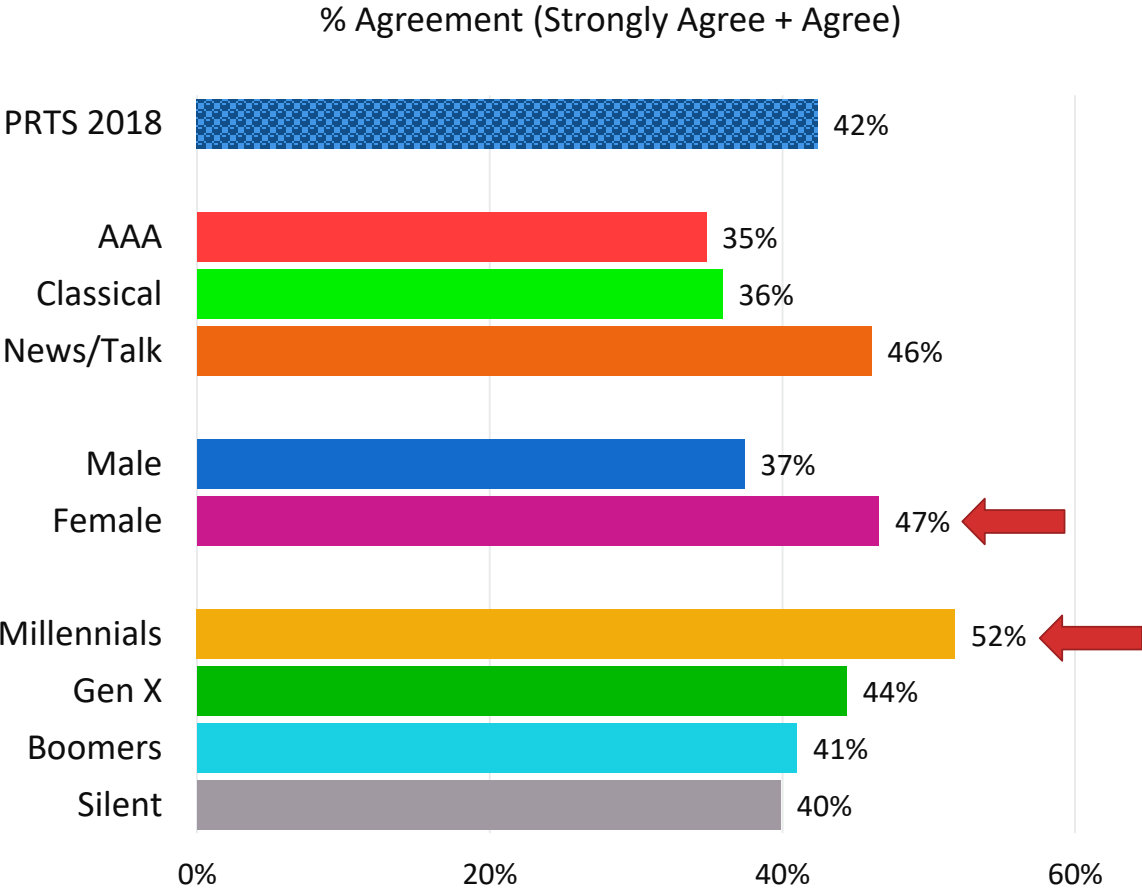
*"As a result of the 2016 election,  
I'm listening to more public radio"*



# The 2016 Election Has Been a Catalyst for Increased Public Radio Support, With Millennials and Women Leading the Way

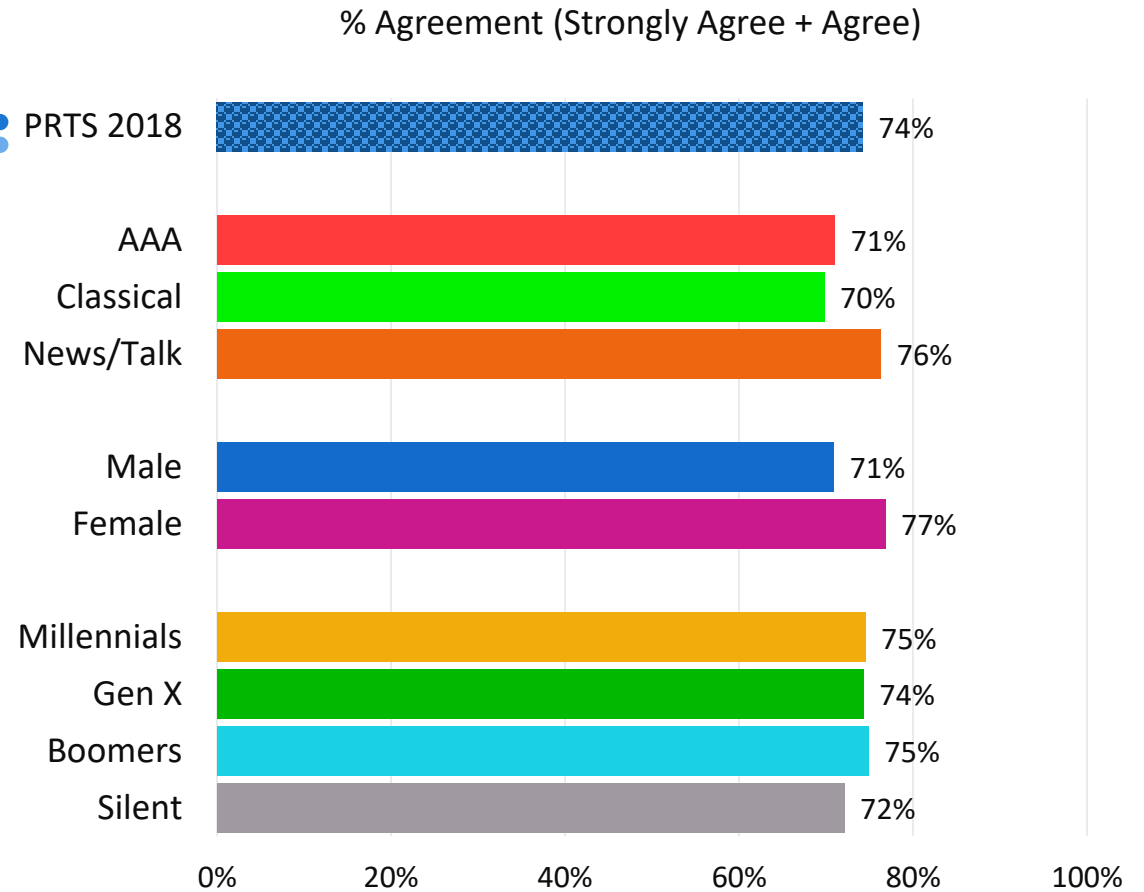
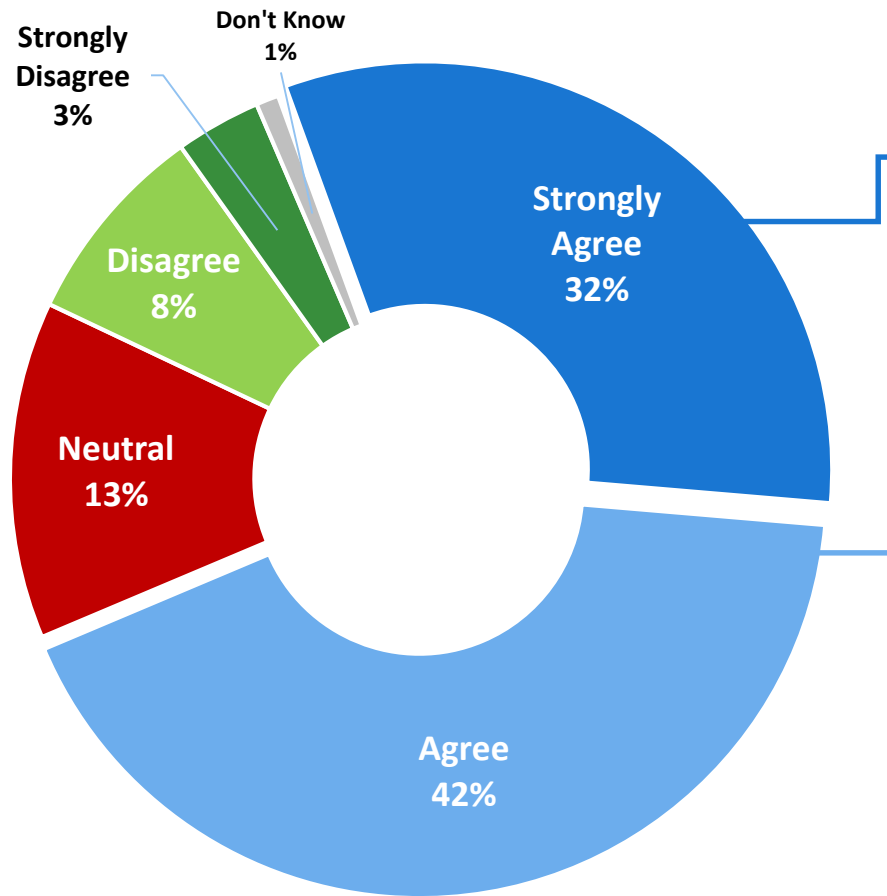


*"As a result of the 2016 election,  
I'm providing increased support to public radio"*





# Three in Four Are Looking More Closely at News Sources Due to “Fake News”



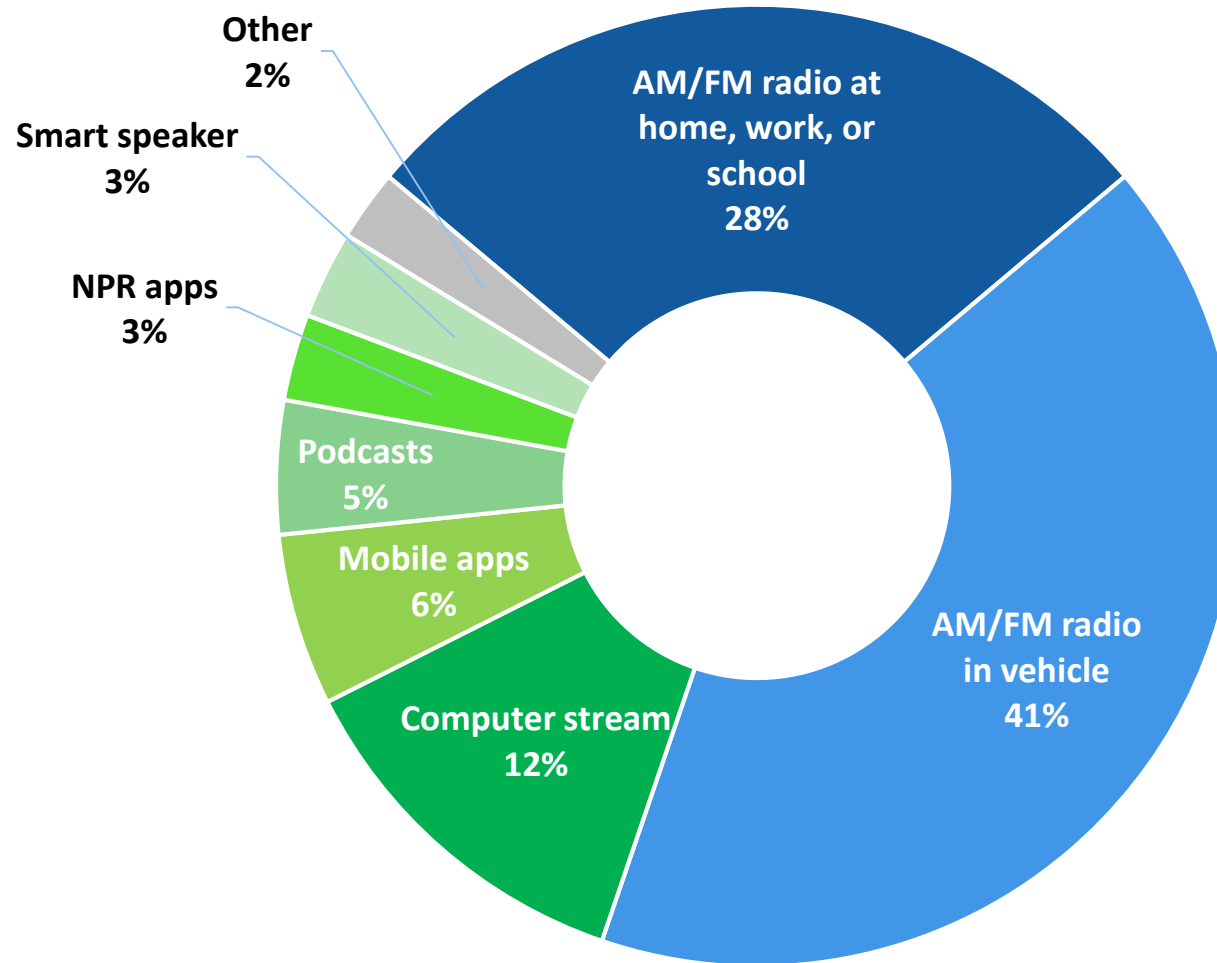
*"I find myself looking more closely at the source of news articles recently due to the proliferation of so-called 'fake news'"*

# Home Station Listening Platforms



# Home Station Listening Platforms

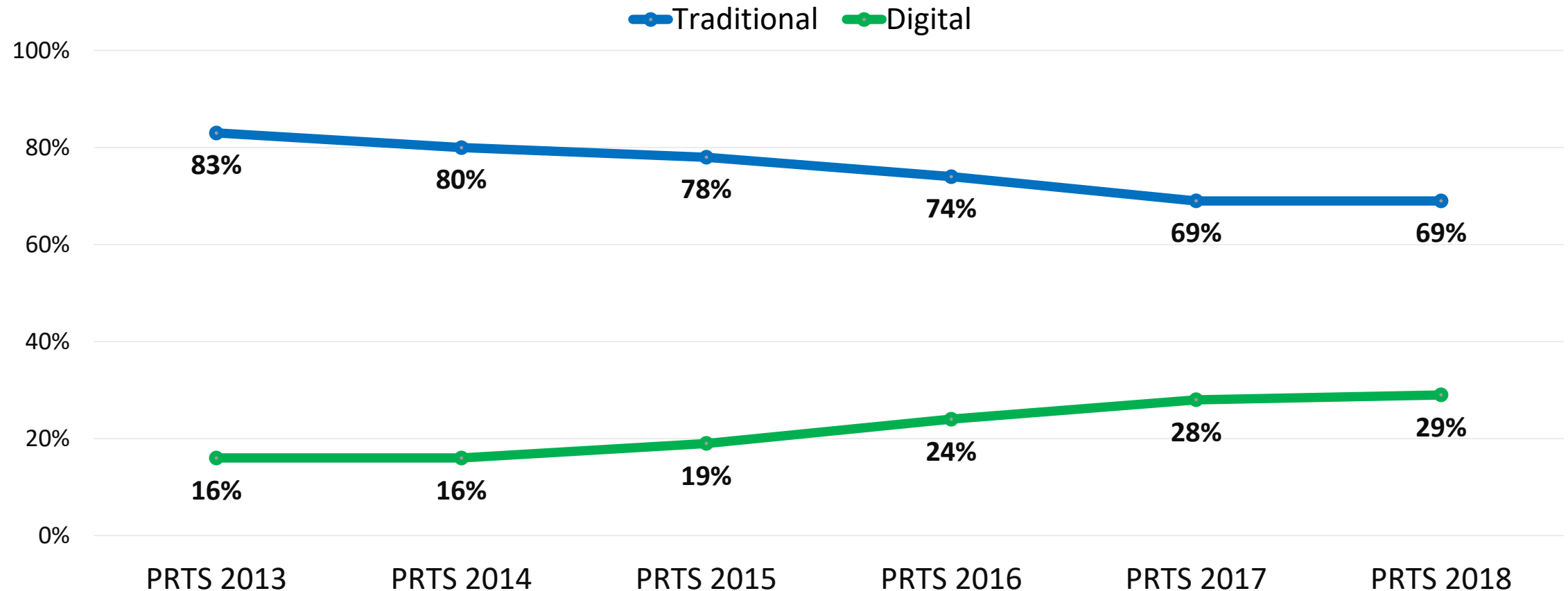
## *Total*



Traditional – 69%  
Digital – 29%

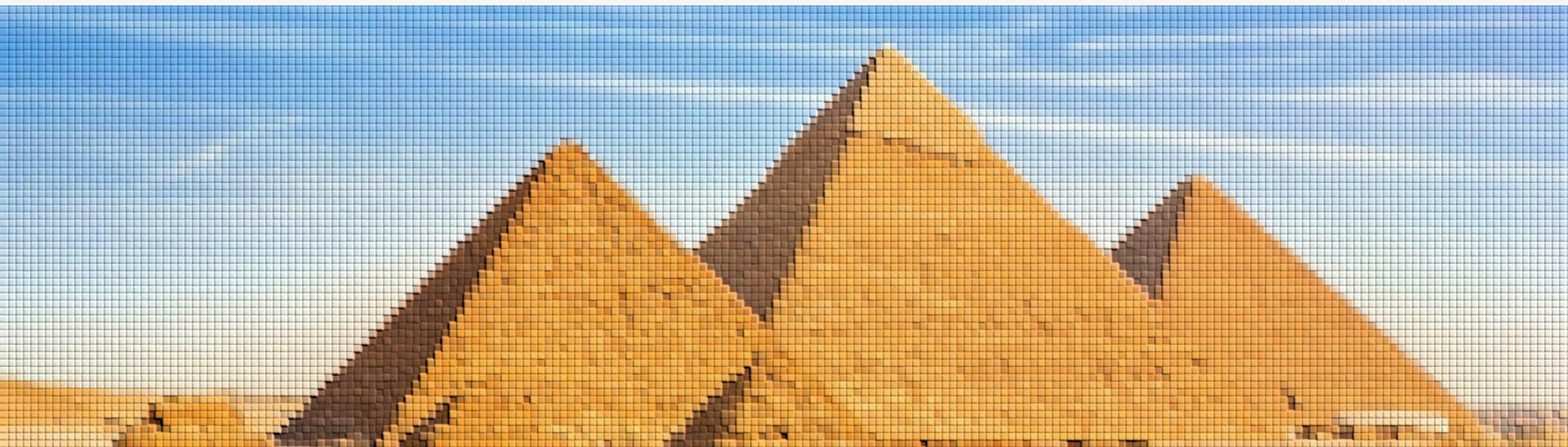
PRTS 2017  
Traditional – 69%  
Digital – 28%

# Home Station Listening Platforms: Traditional vs. Digital



% of time spent with home station in a typical week via  
traditional platforms (an AM/FM radio at home/school/work or in a vehicle)  
vs. digital platforms (computer, mobile/NPR apps, podcasts, smart speaker)





# Media & Brand Pyramids

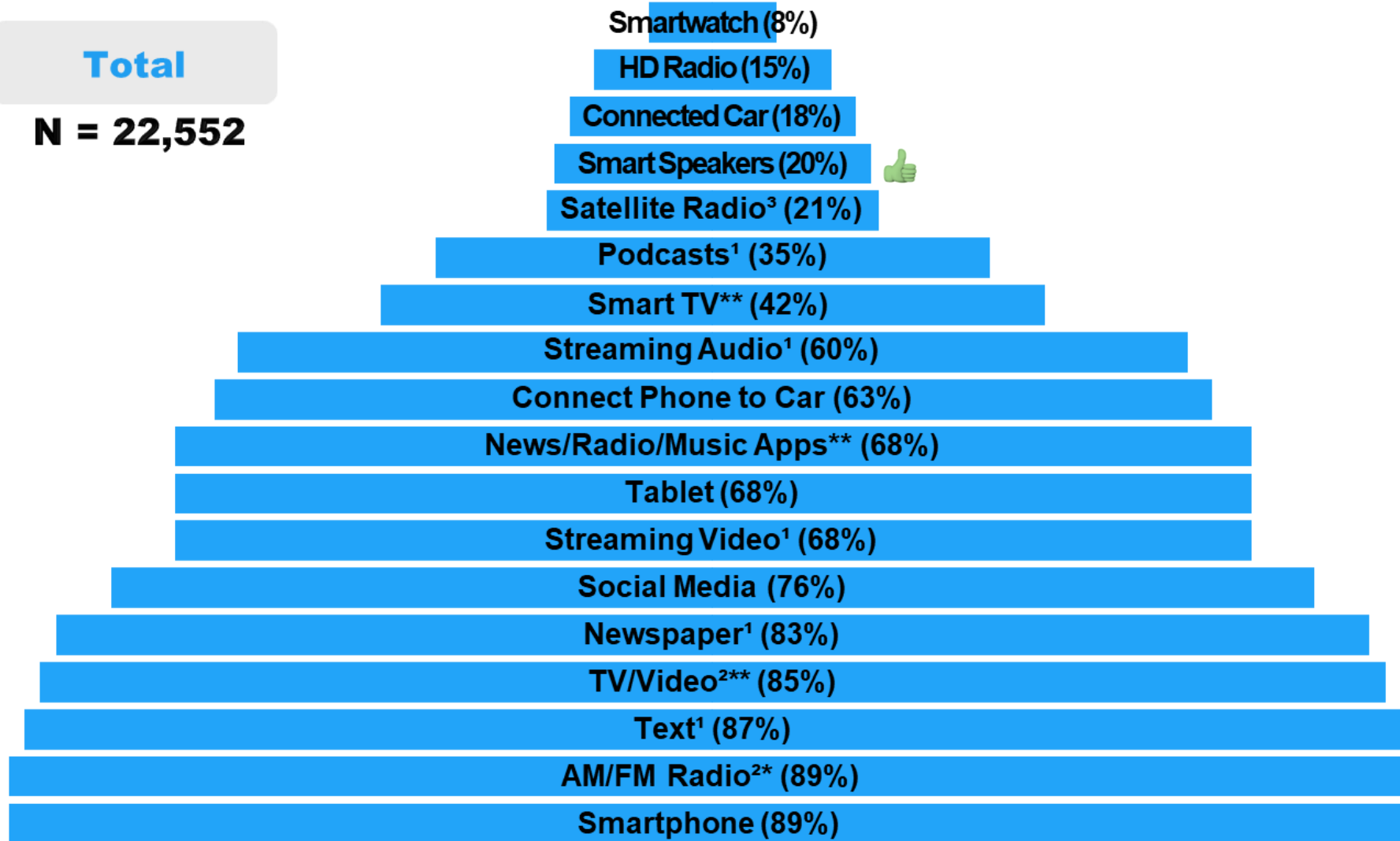




# Media Pyramid 2018

**Total**

**N = 22,552**



**Total  
PRTS 2017**

6%
18%
18%
12%
24%
35%
**
63%
64%
**
67%
70%
79%
85%
**
88%
89%
88%

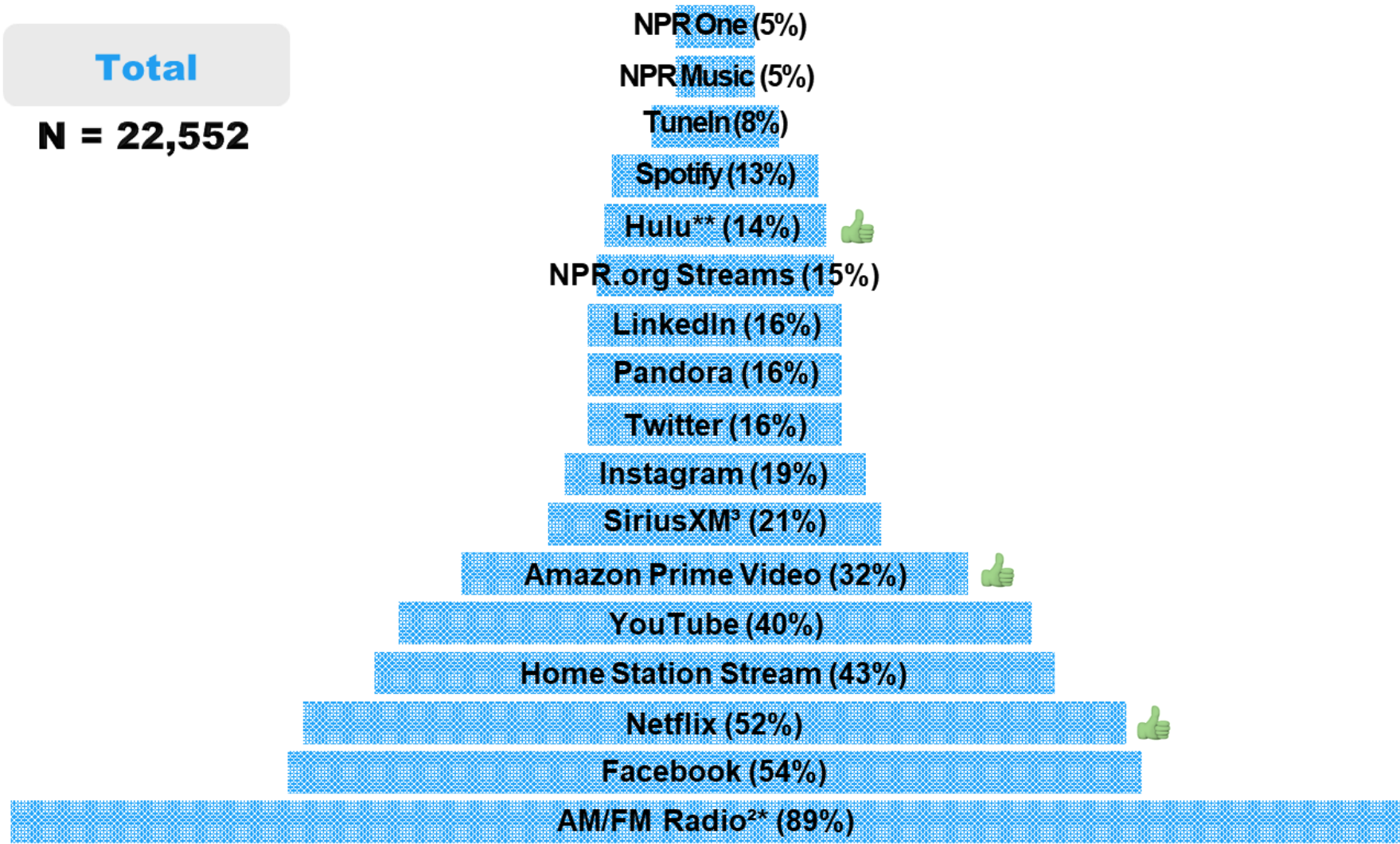
<sup>1</sup> Weekly or more <sup>2</sup> 1+ hour per day <sup>3</sup> Paid & trial users \* Any platform/device \*\*Wording Change



# Brand Pyramid 2018

**Total**

**N = 22,552**



**Total  
PRTS 2017**

4%

6%

9%

13%

10%

14%

17%

18%

17%

17%

24%

25%

38%

46%

47%

57%

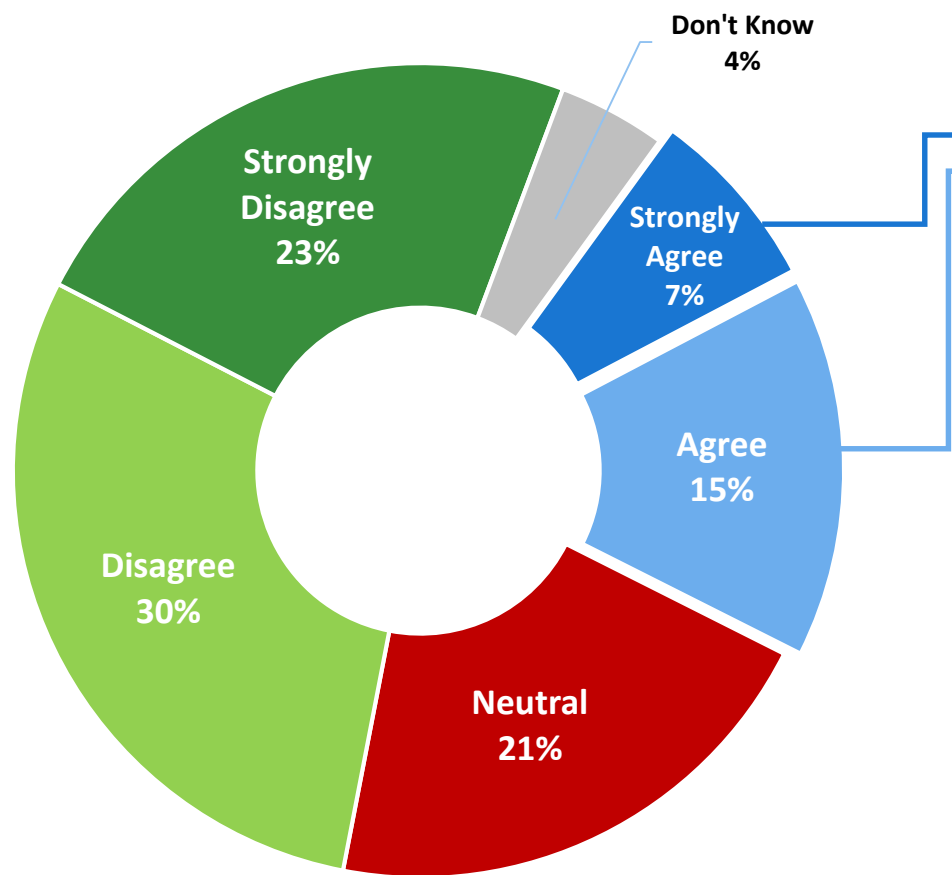
89%

All weekly use unless noted <sup>2</sup> 1+ hour per day <sup>3</sup> Paid & trial users \*Any Platform/Device \*\*Includes Live TV

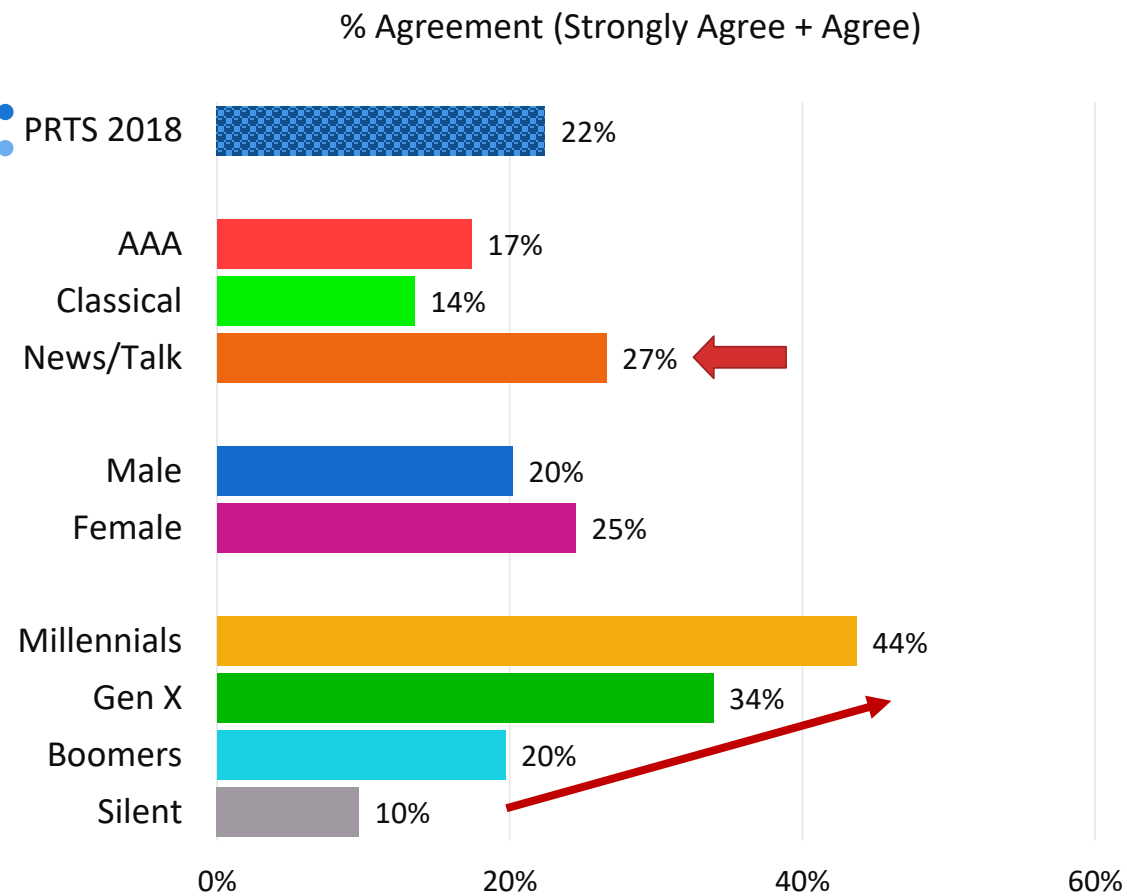


# Podcasting and the On-Demand Experience

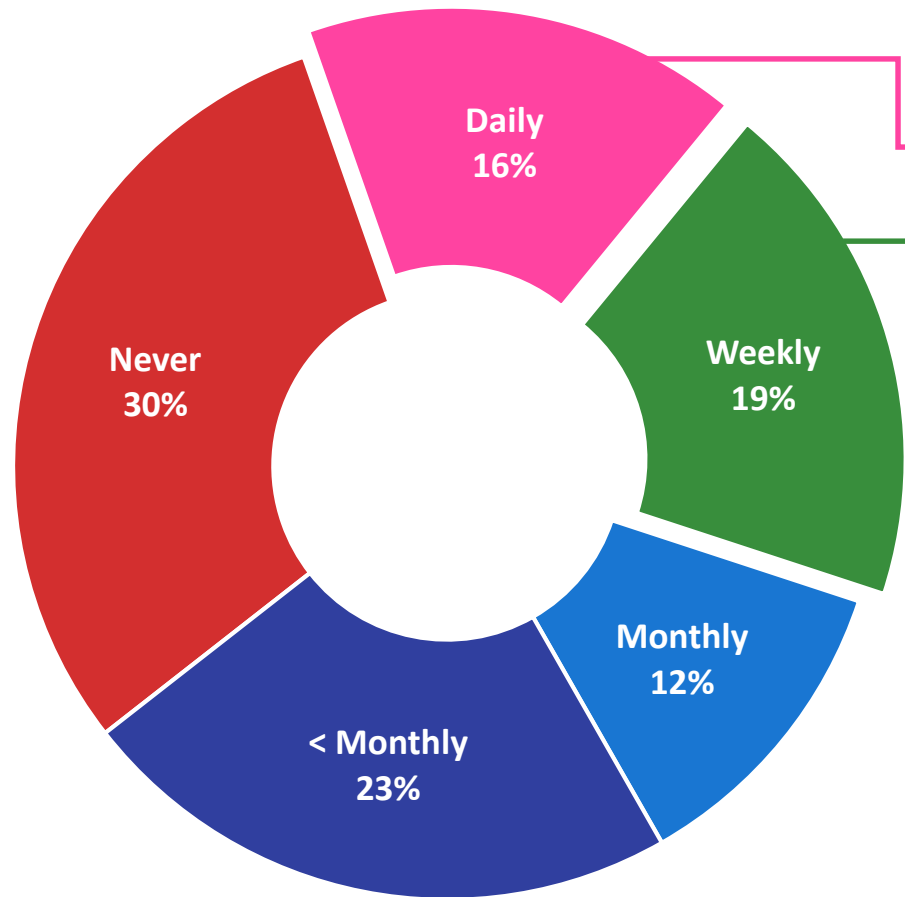
# Led by Millennials and Xers, More Than One-Fifth Are Listening to More Public Radio On-Demand



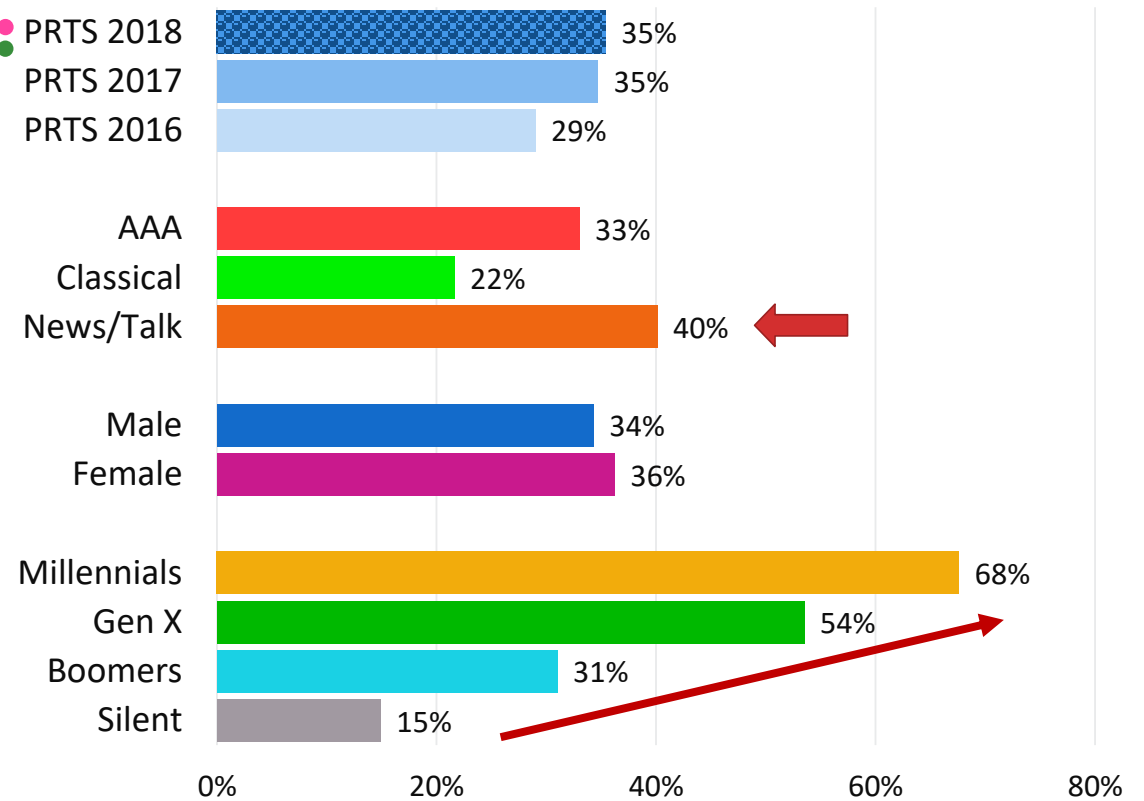
*"I find myself listening to more public radio on-demand (podcasts, etc.)"*



# More than Two-Thirds of Millennials and More Than Half of Generation X Listens to Podcasts Weekly or More Often

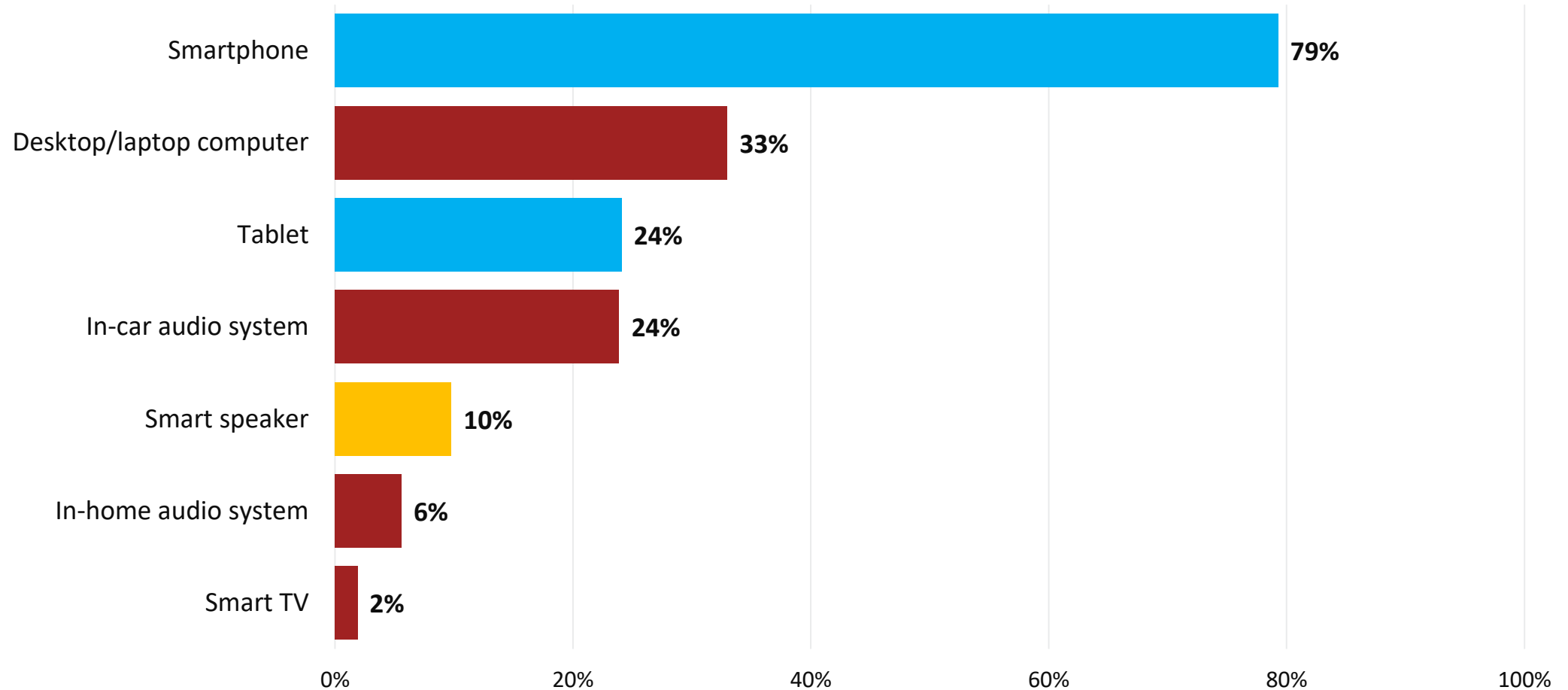


% Who Listen to Podcasts/On-Demand Audio Weekly or More



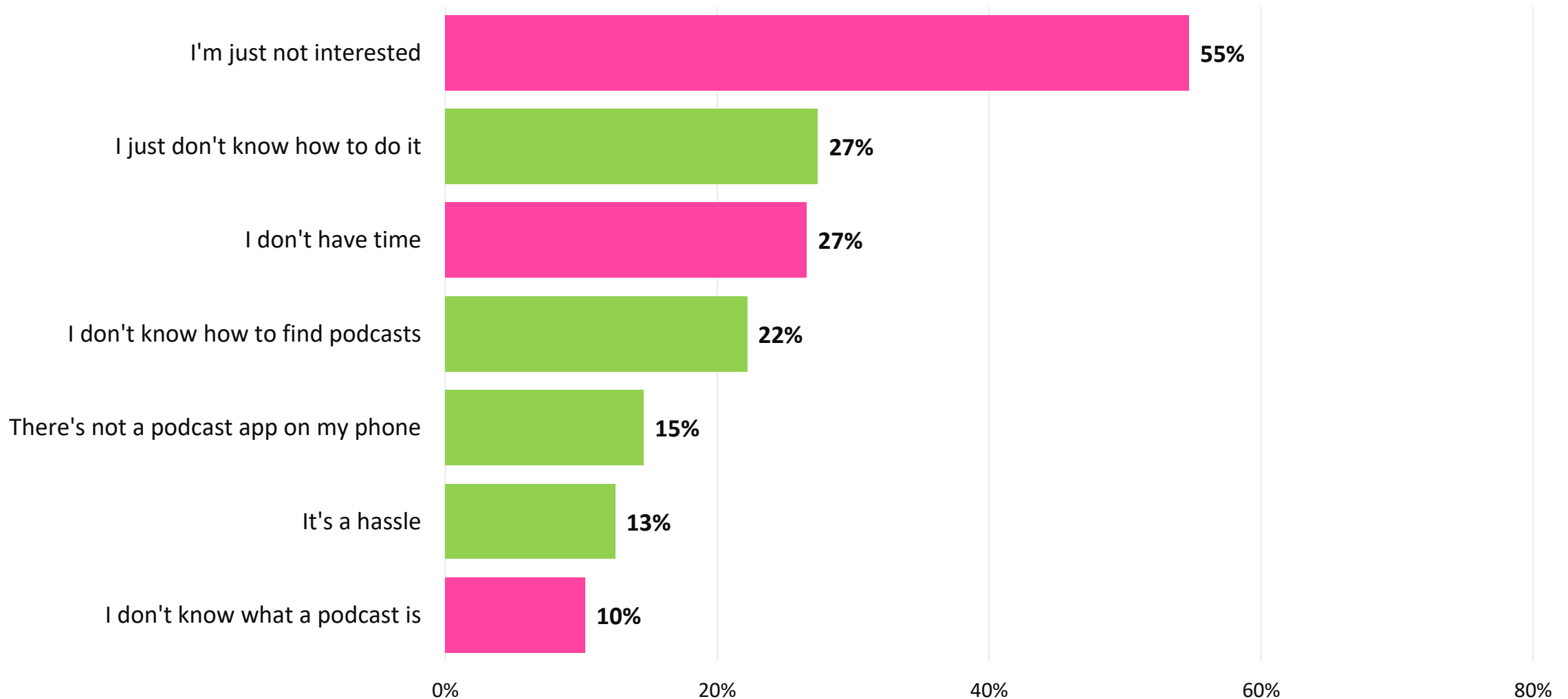


# About Four in Five Weekly Podcast Listeners Regularly Listen on Their Smartphones



Among weekly podcast listeners, % who regularly listen to podcasts using each device

# Top Reasons Why People Don't Listen to Podcasts

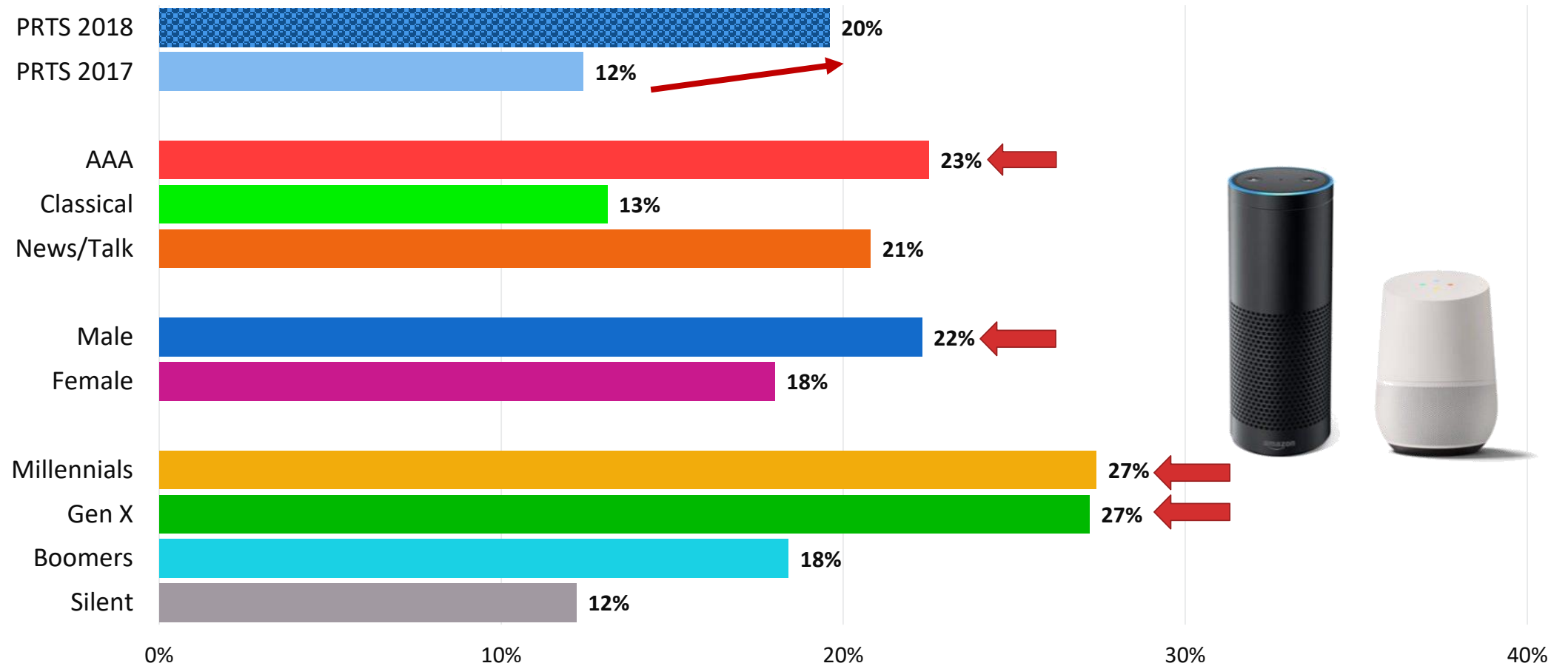


Among those who never listen to podcasts, % mentioning each as a reason they don't listen

# Smart Speakers

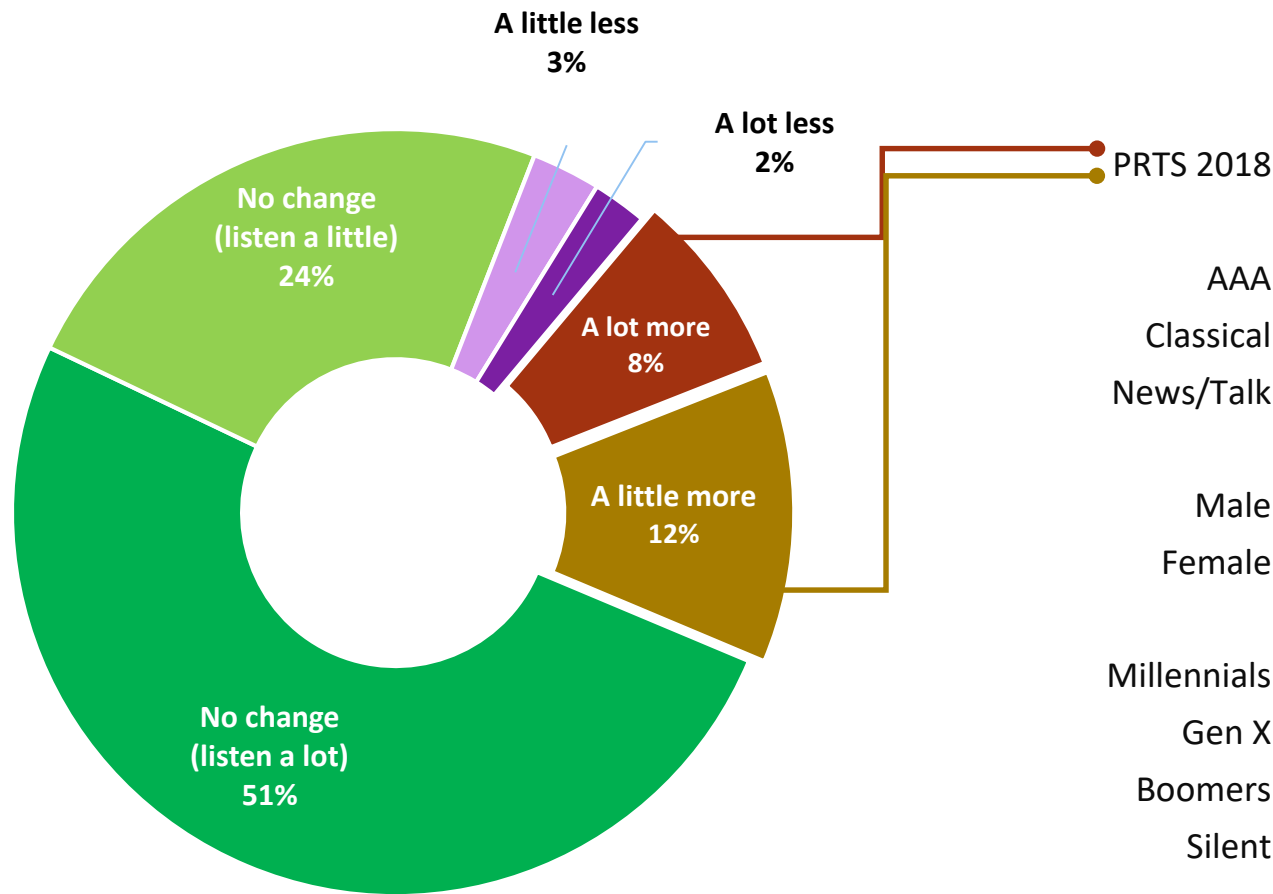


# Smart Speaker Ownership Has Risen Sharply in the Past Year



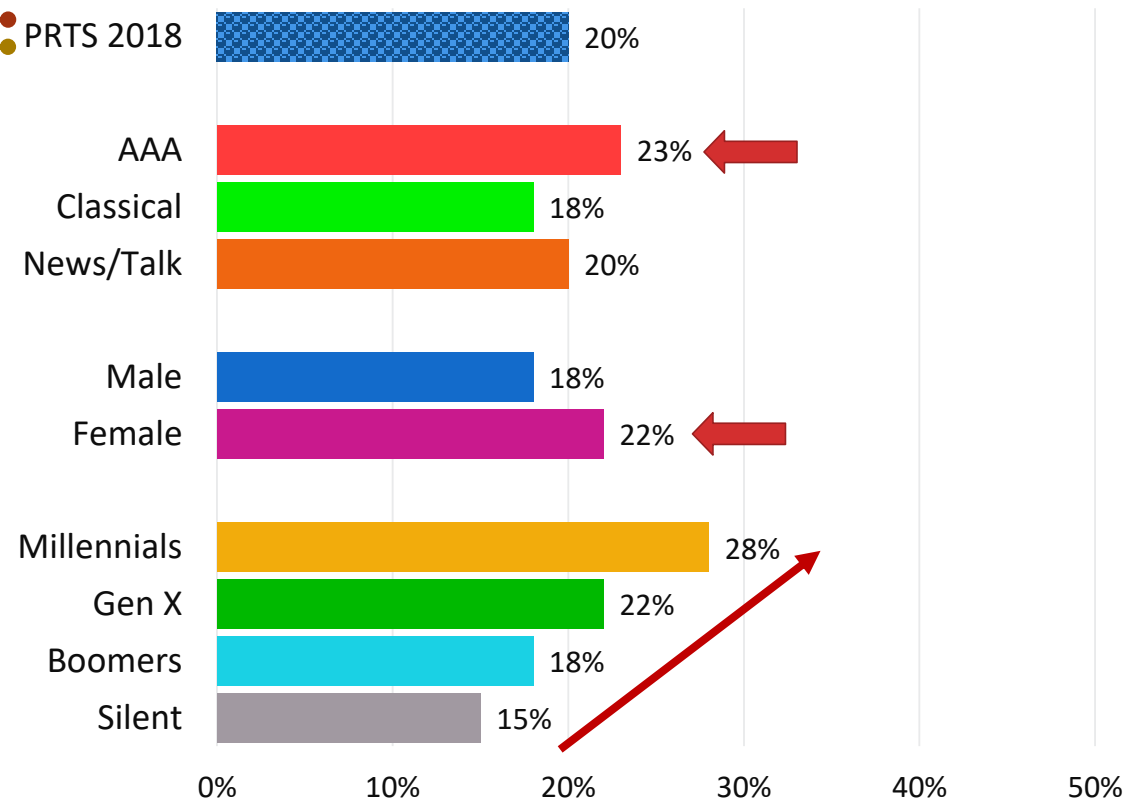
% who own a smart speaker (Amazon Alexa, Google Home, etc.)

# Millennials and Females Are Most Apt to Listen to More AM/FM Radio Since Getting a Smart Speaker



*"How has your listening to AM/FM radio stations changed overall since you got a smart speaker?"*

% Who Say They Are Listening to AM/FM Radio Stations More (A Lot + A Little) Since Getting a Smart Speaker

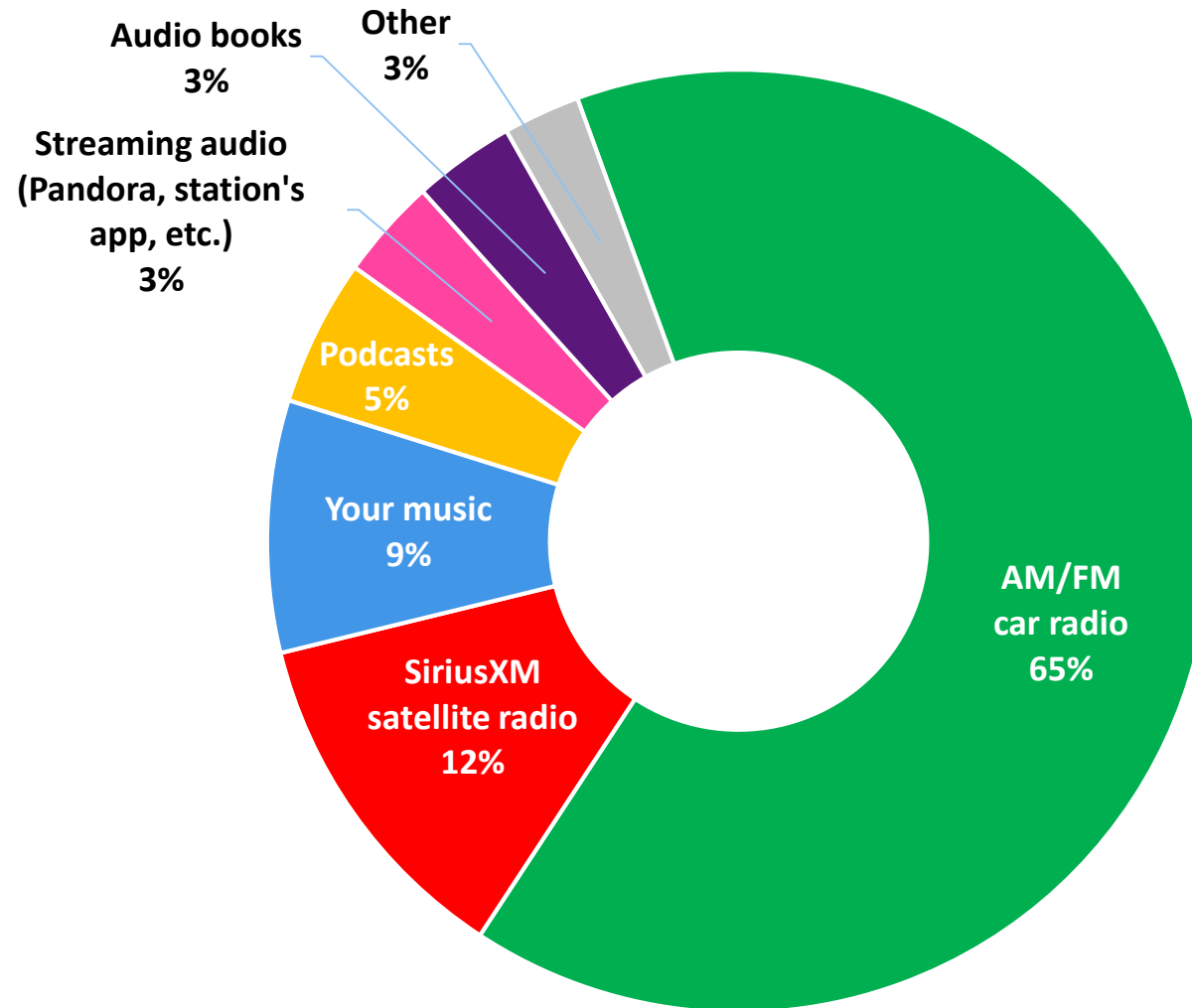




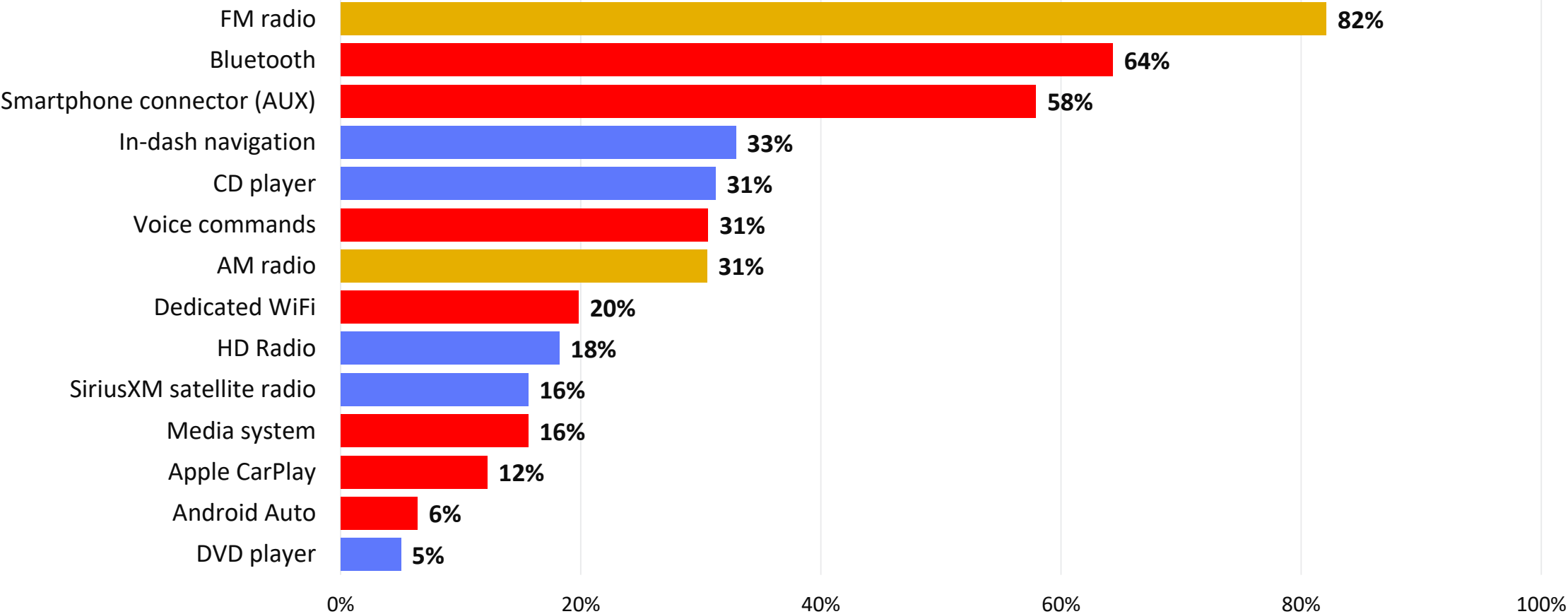
# In-Car Media



# In-Car Audio Usage *Total*

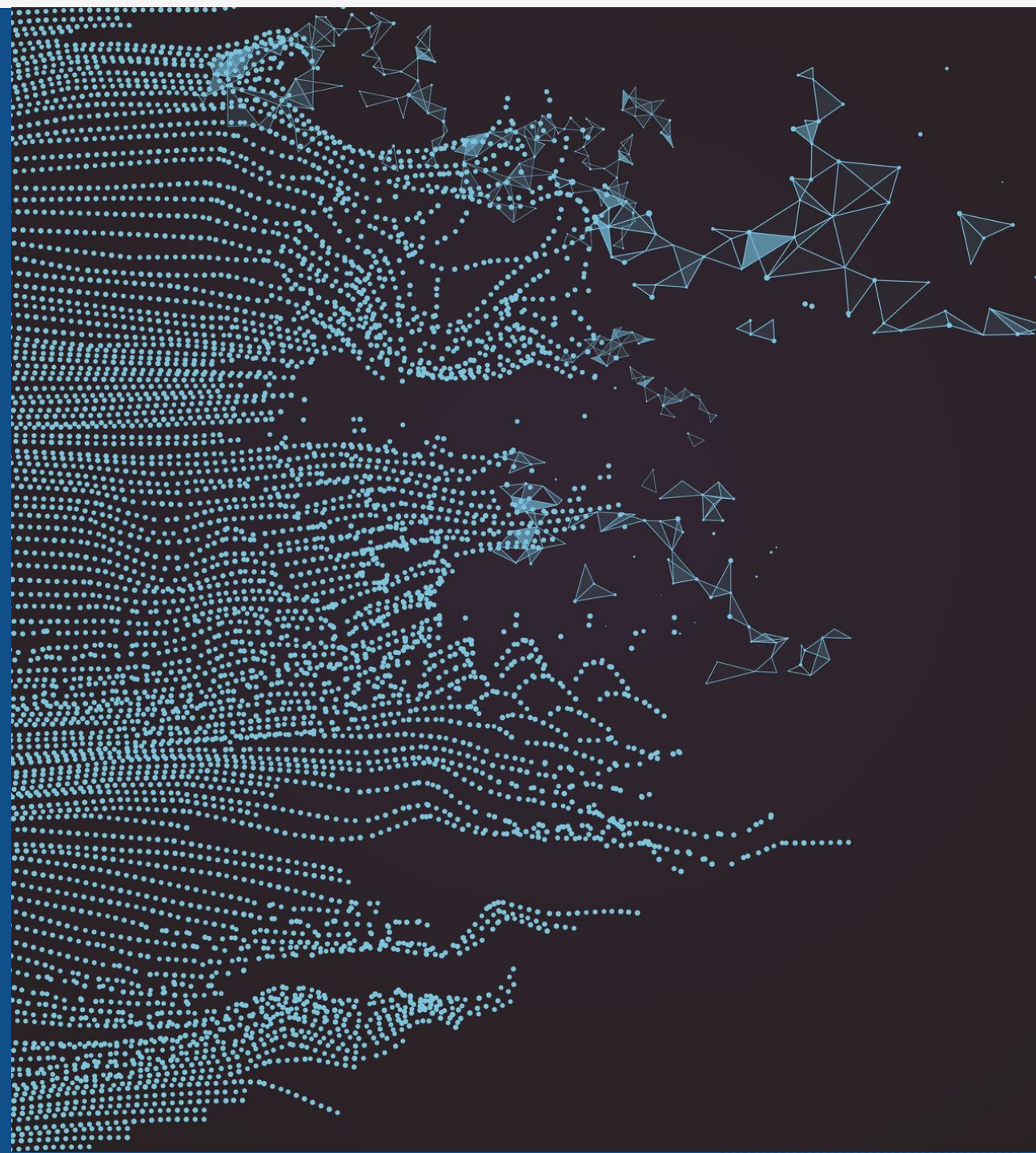


# FM Radio Leads the List of Most Important New Car Features, Followed by Bluetooth and Auxiliary Jack to Connect Smartphones



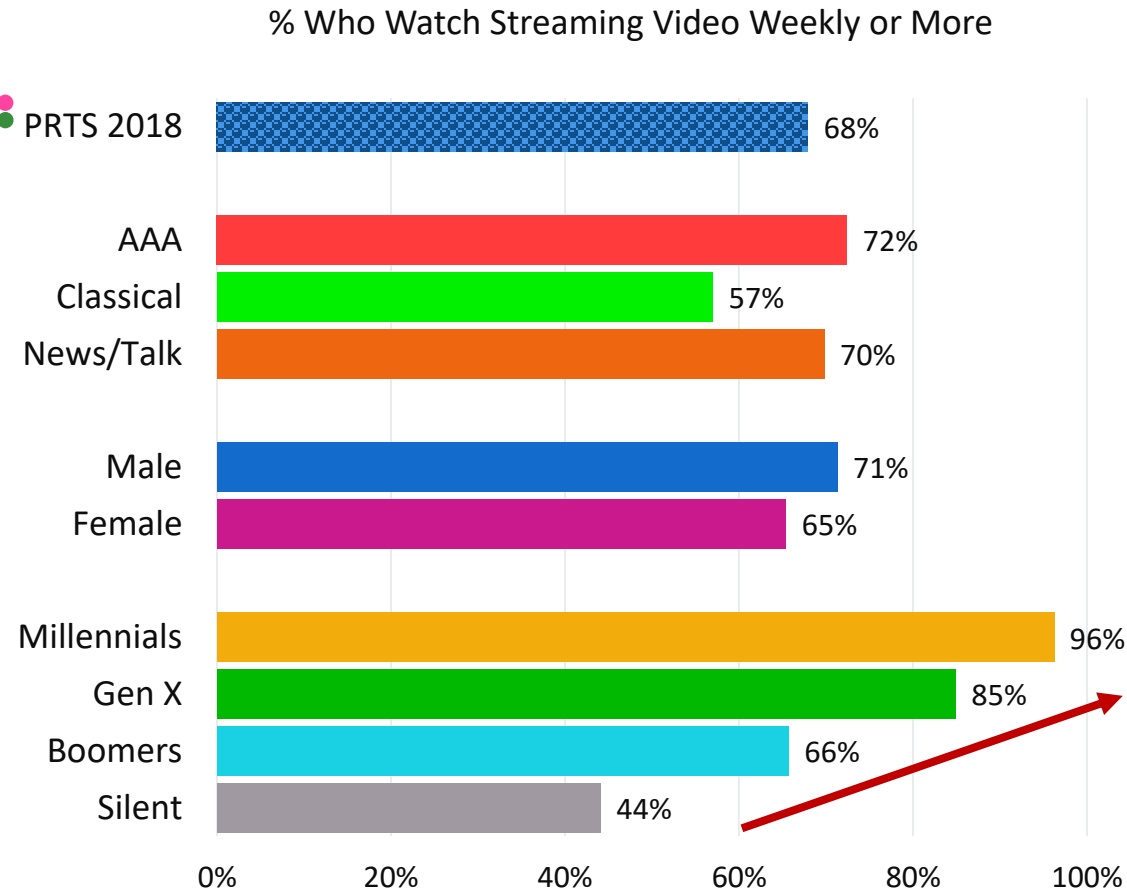
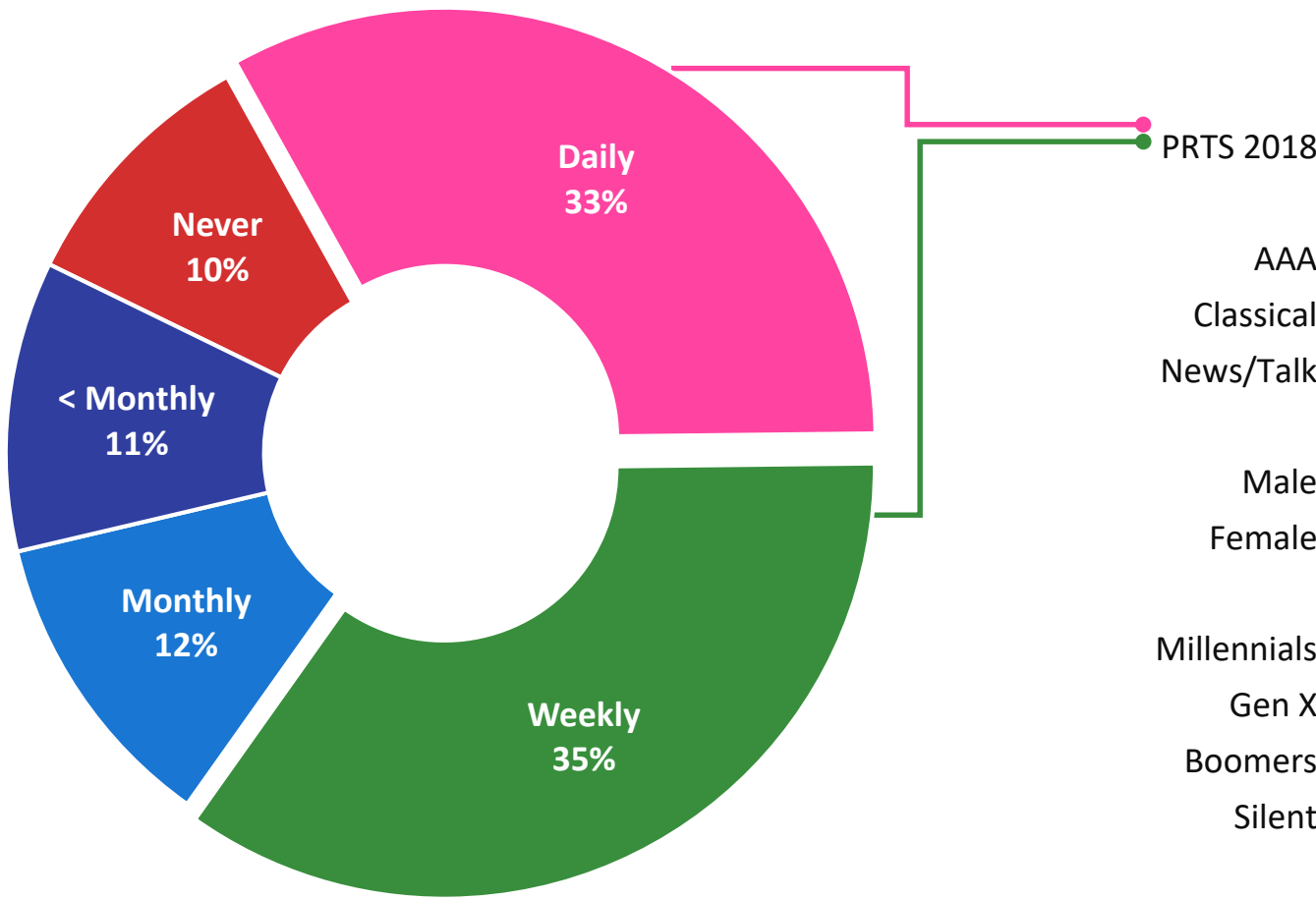
“Very Important” features among those planning on buying/leasing  
(or already bought) a new vehicle in 2018

# Streaming: Video & Audio

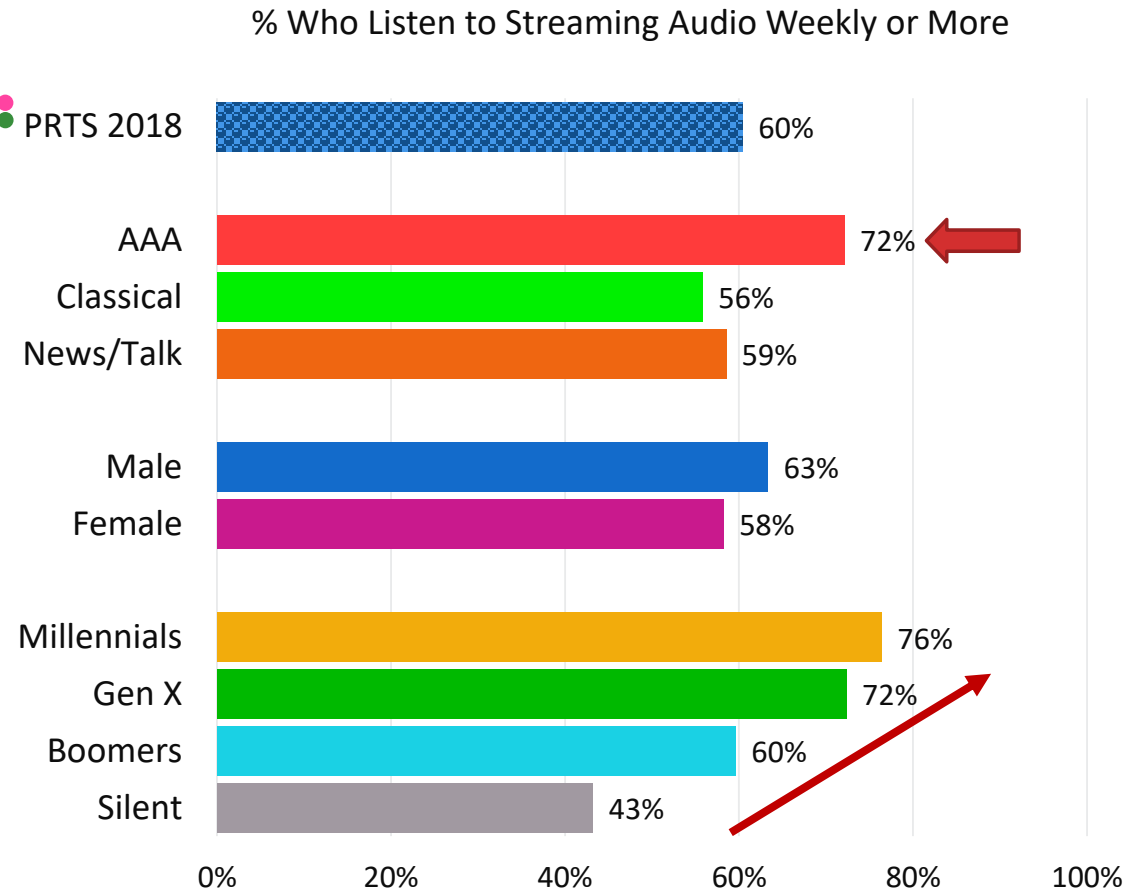
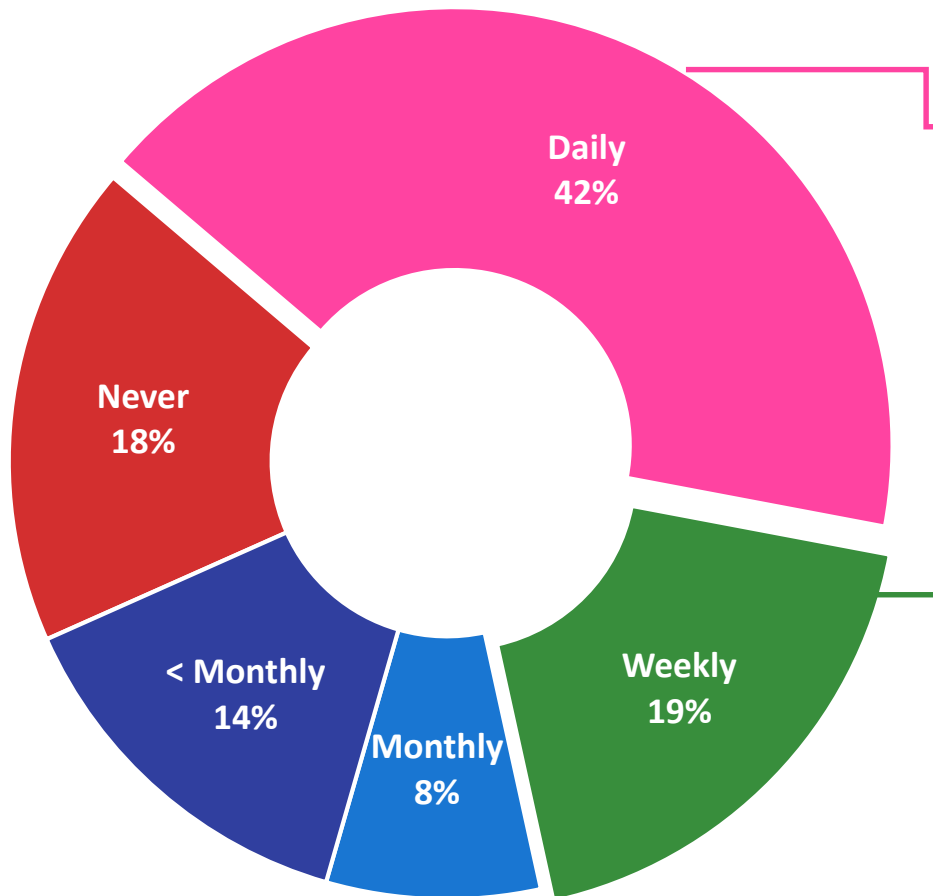




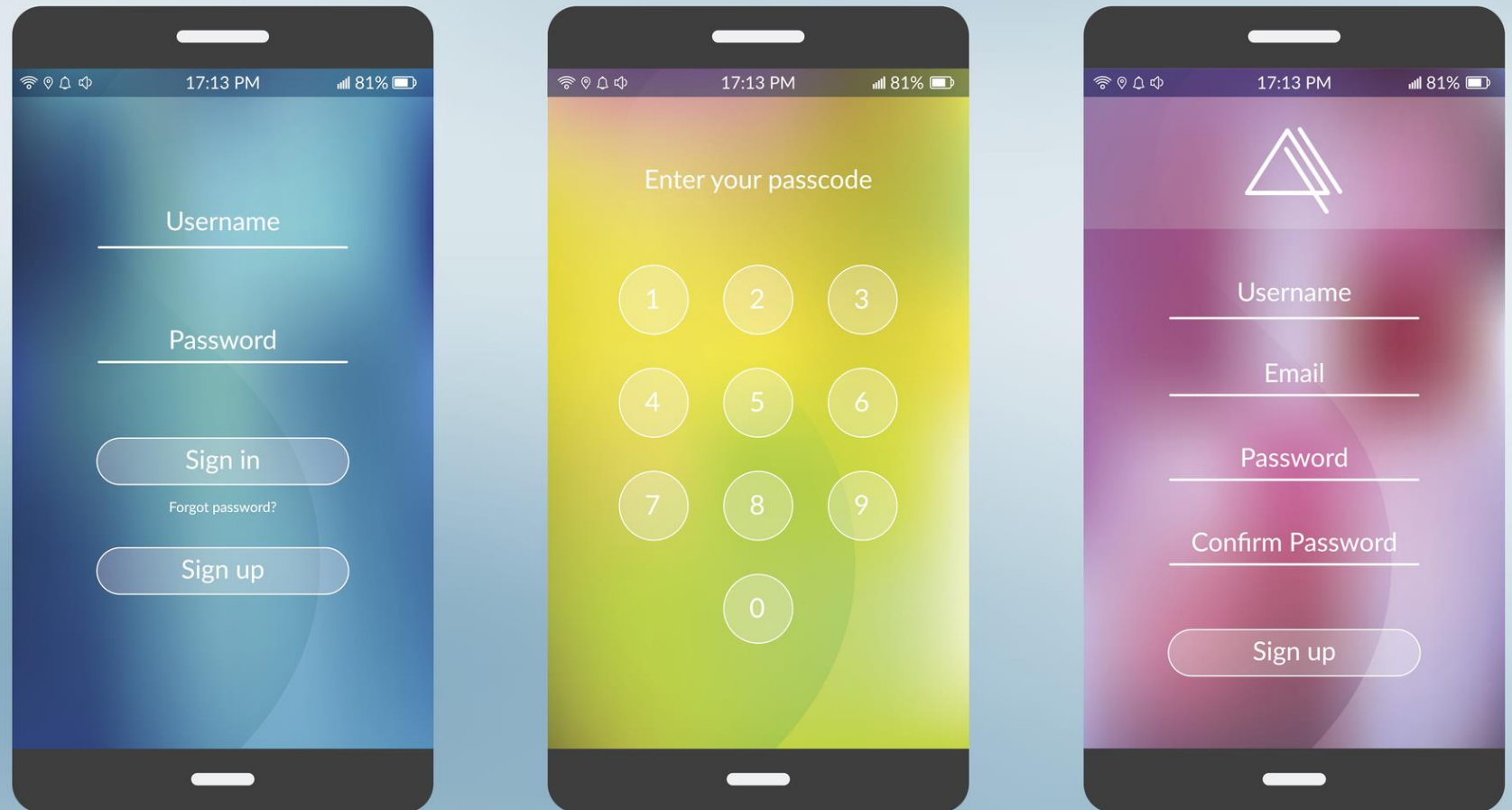
# One in Three Watch Streaming Video Daily; Weekly Usage Is Now Two-Thirds



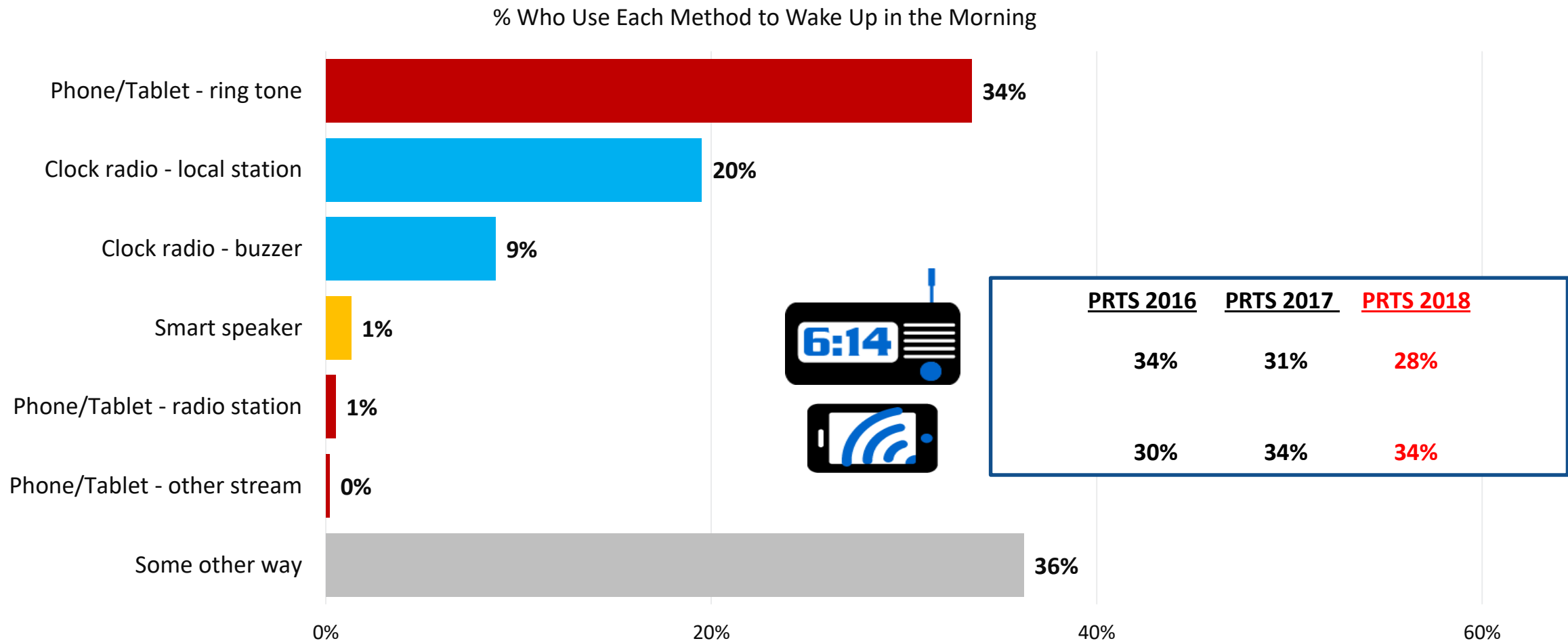
# More Than Four in Ten Listen to Streaming Audio Daily; Weekly Usage Reaches Six in Ten



# Mobile

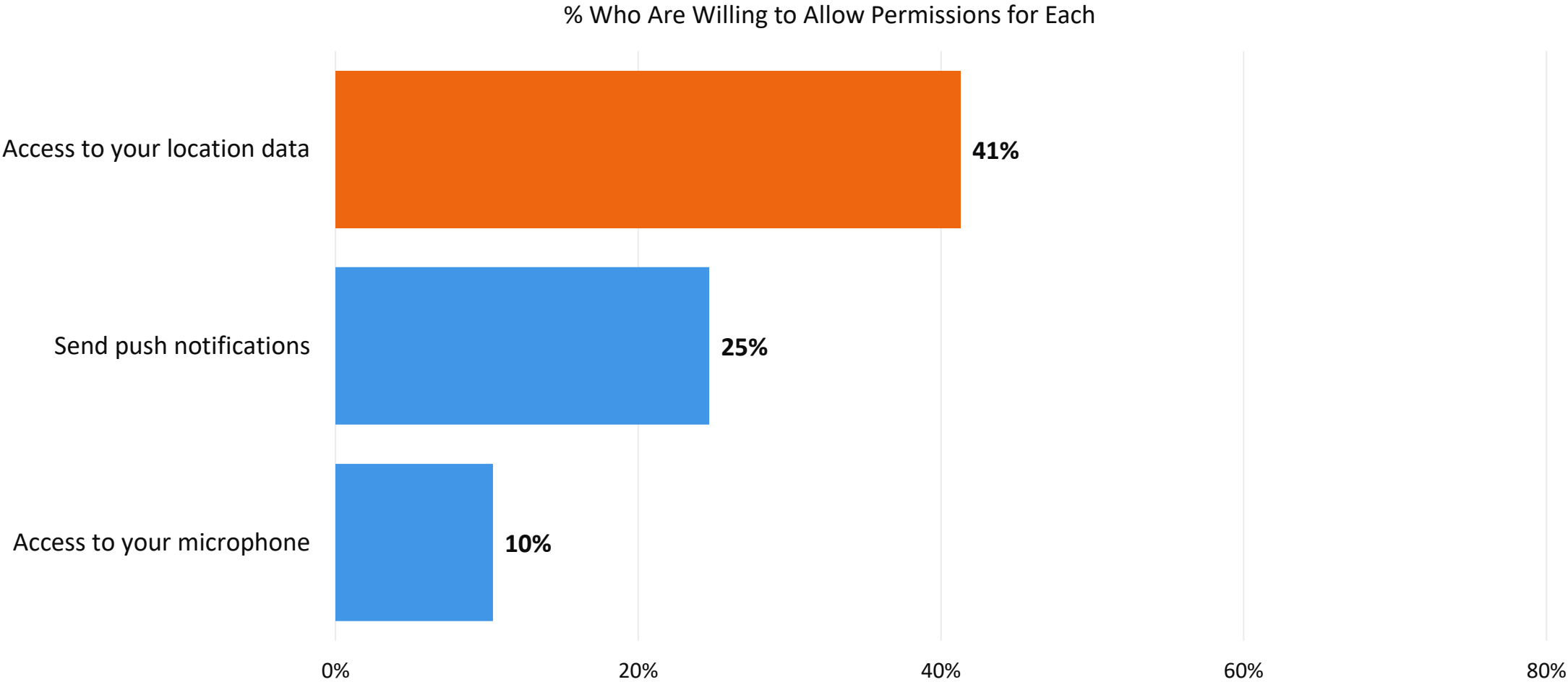


# More Than One-Third Use a Mobile Device to Wake Up





# Four in Ten Are Willing to Share Location Data With News/Radio/Music Apps They Have Downloaded; One-Fourth Allow Push Notifications

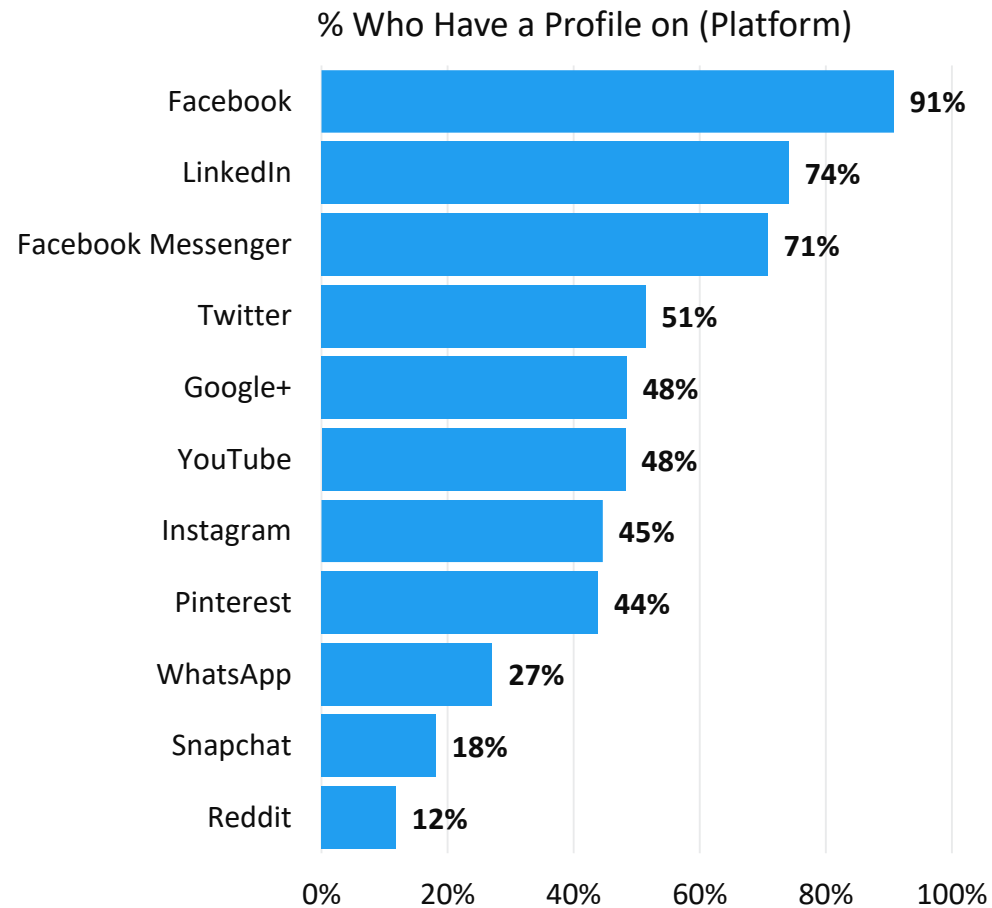


Among smartphone and/or tablet owners who have downloaded a news/radio/music app

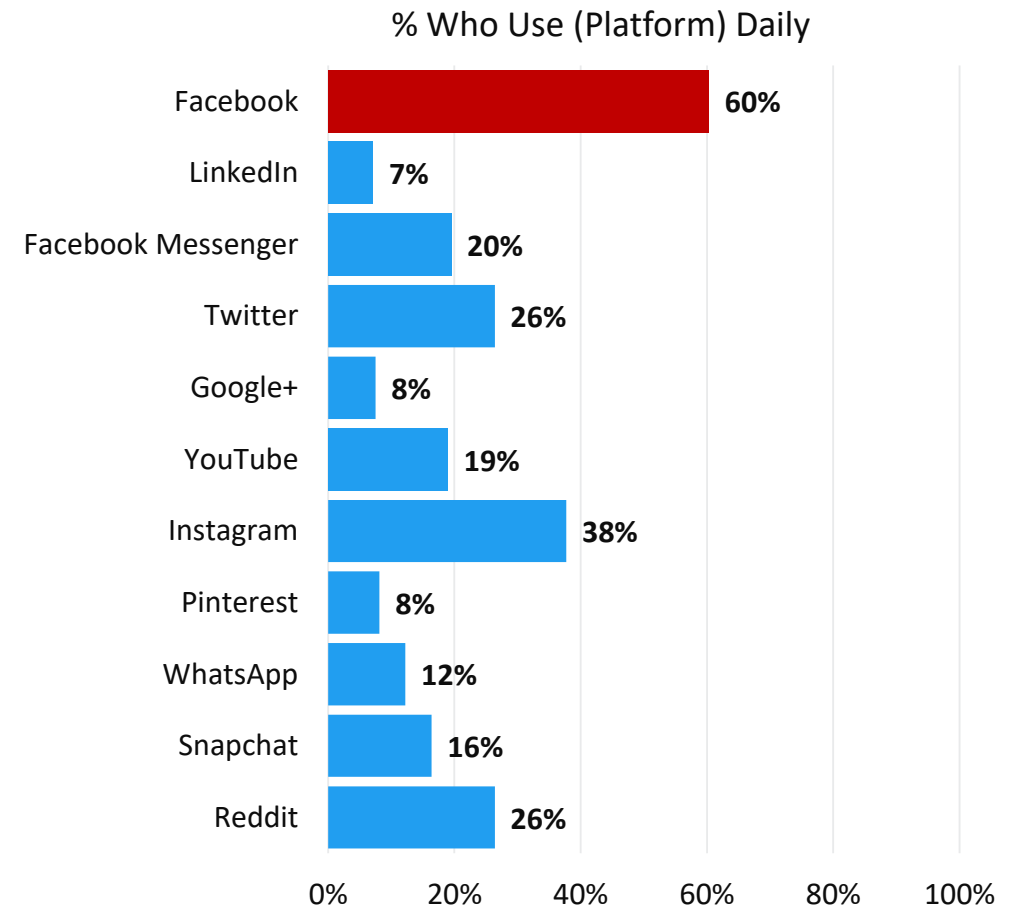


# Social Media

# Facebook is Far and Away the Leader for Daily Usage Among Those With a Social Media Profile

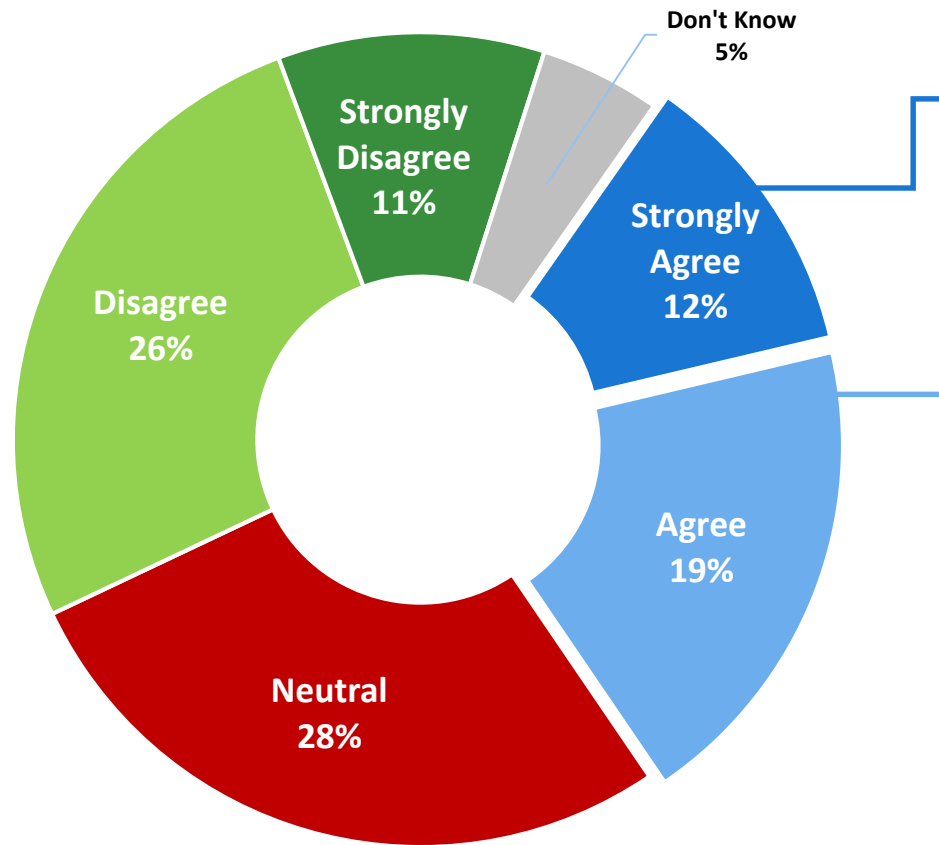


Among those with any social media profile



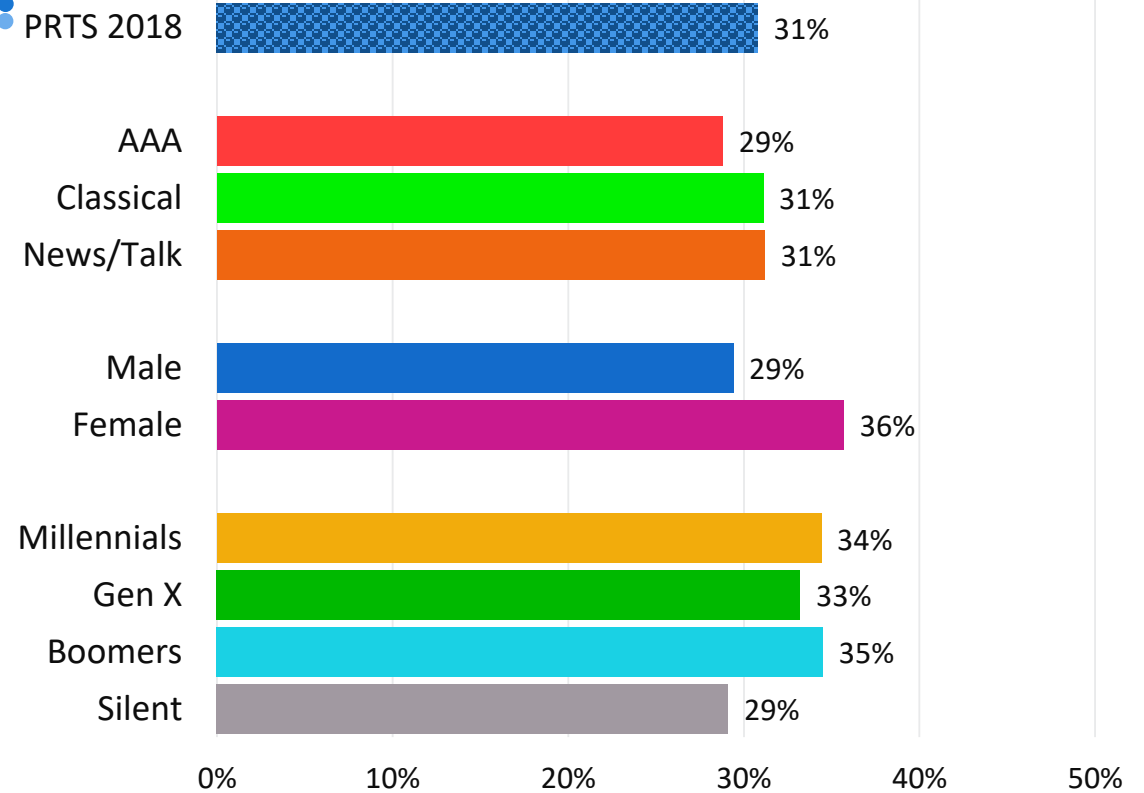
Among those with a profile on (platform)

# One in Three With a Social Media Profile Is Spending Less Time With Social Media Due to the Rise of “Fake News”



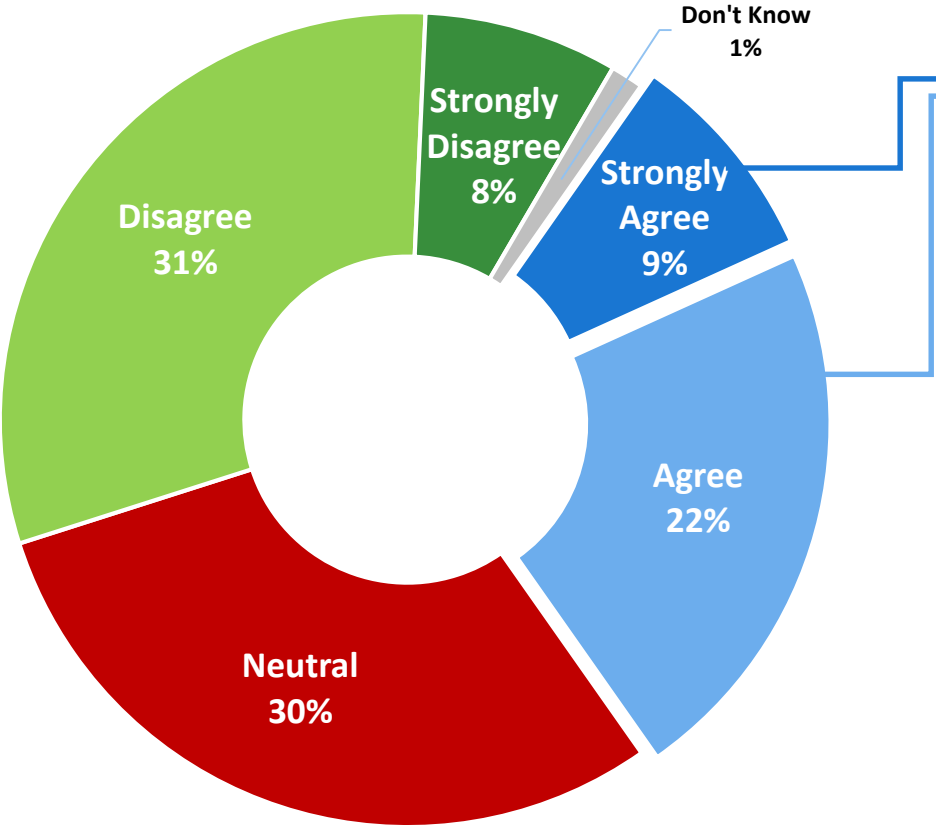
*"I am spending less time with social media due to the proliferation of 'fake news'"*

% Agreement (Strongly Agree + Agree)

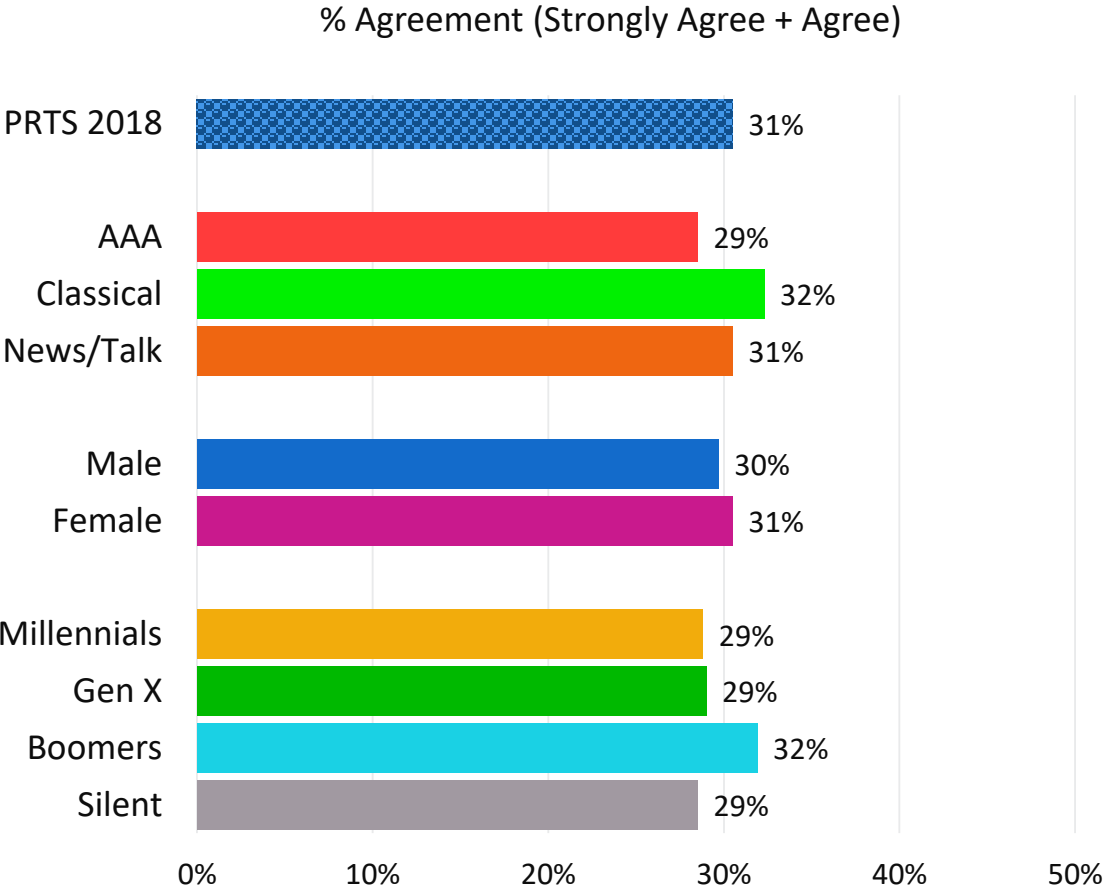


Among those who have any social media profile

# One in Three With a Social Media Profile Is Spending Less Time With Social Media Due to Concerns About Personal Information



*"I am spending less time with social media due to concerns about my personal information"*



Among those who have any social media profile



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