

Public Radio TECHSURVEY 2019

JACOBS MEDIA • PRPD

Public Radio Threads the Digital Needle

Methodology

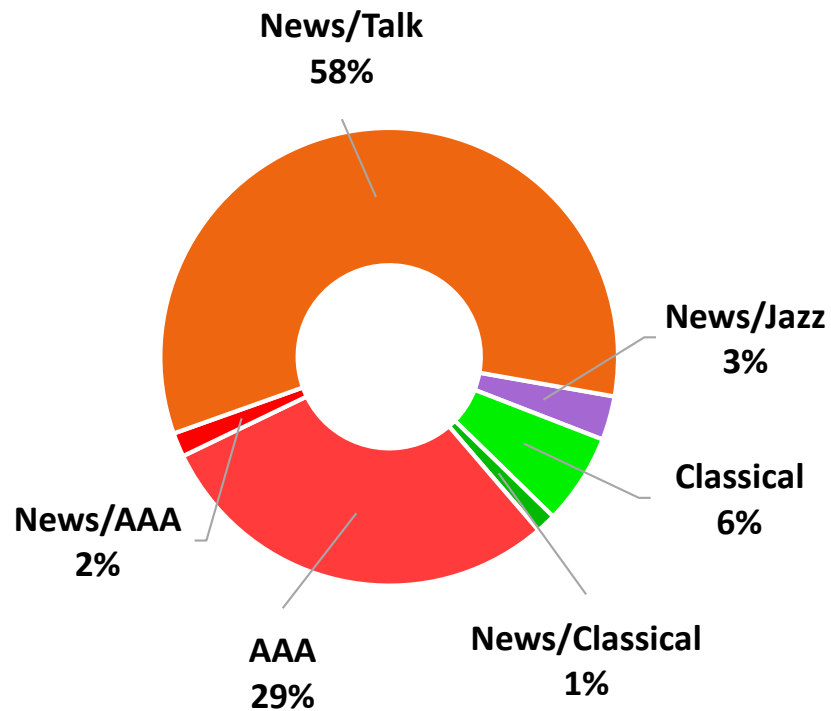
- 54 U.S. public radio stations
- N = 20,325
- Interview dates: June 4 – June 26, 2019
- Most respondents are members of station databases. Some responses were gathered via station websites and/or social networking pages.
- All responses were collected online and weighted using Nielsen 2018 market population data.
- This is a web survey and does not represent all public radio listeners or even each station's audience. It is not stratified to the U.S. population. Respondents are, by and large, public radio users.



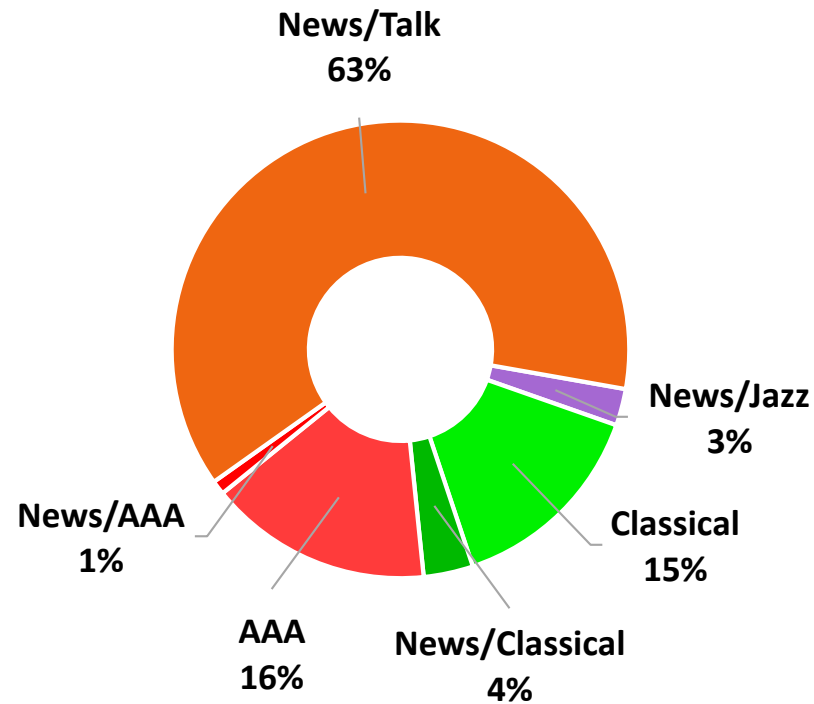
The Sample

Format Composition

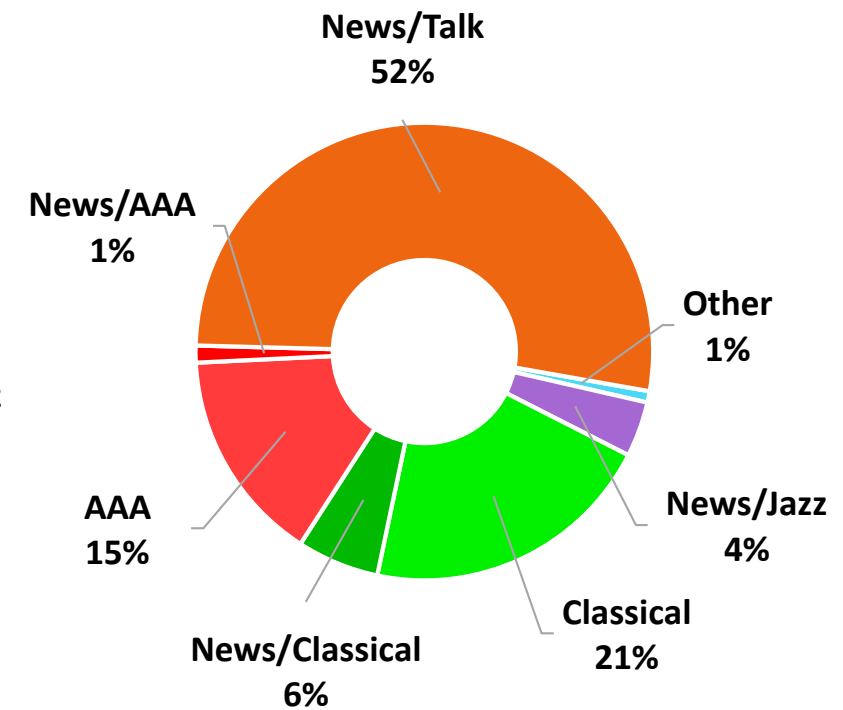
PRTS 2017



PRTS 2018

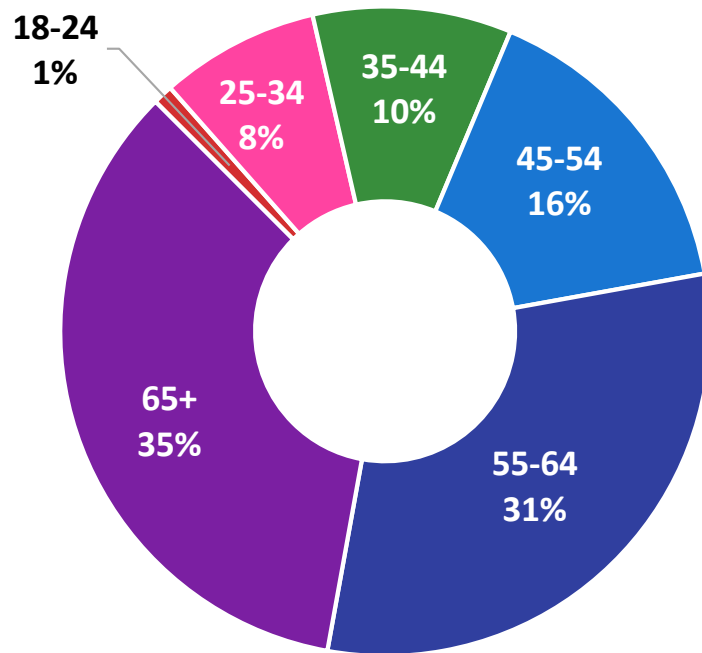


PRTS 2019



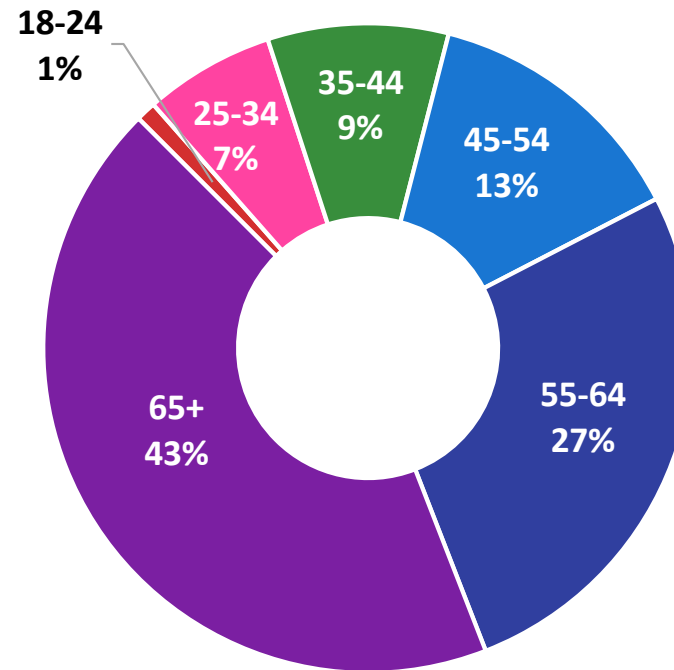
Age

PRTS 2017



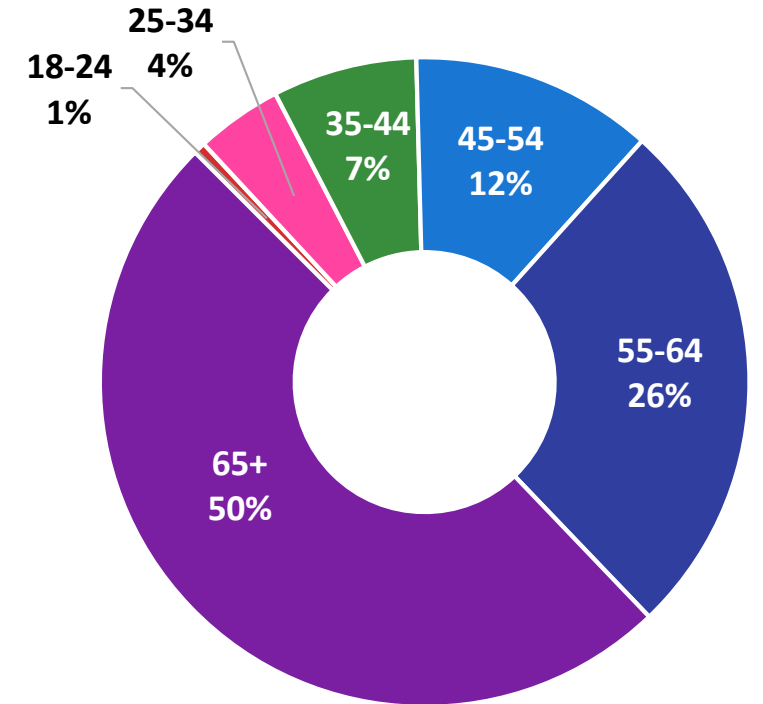
Average age: 57.6

PRTS 2018



Average age: 59.7

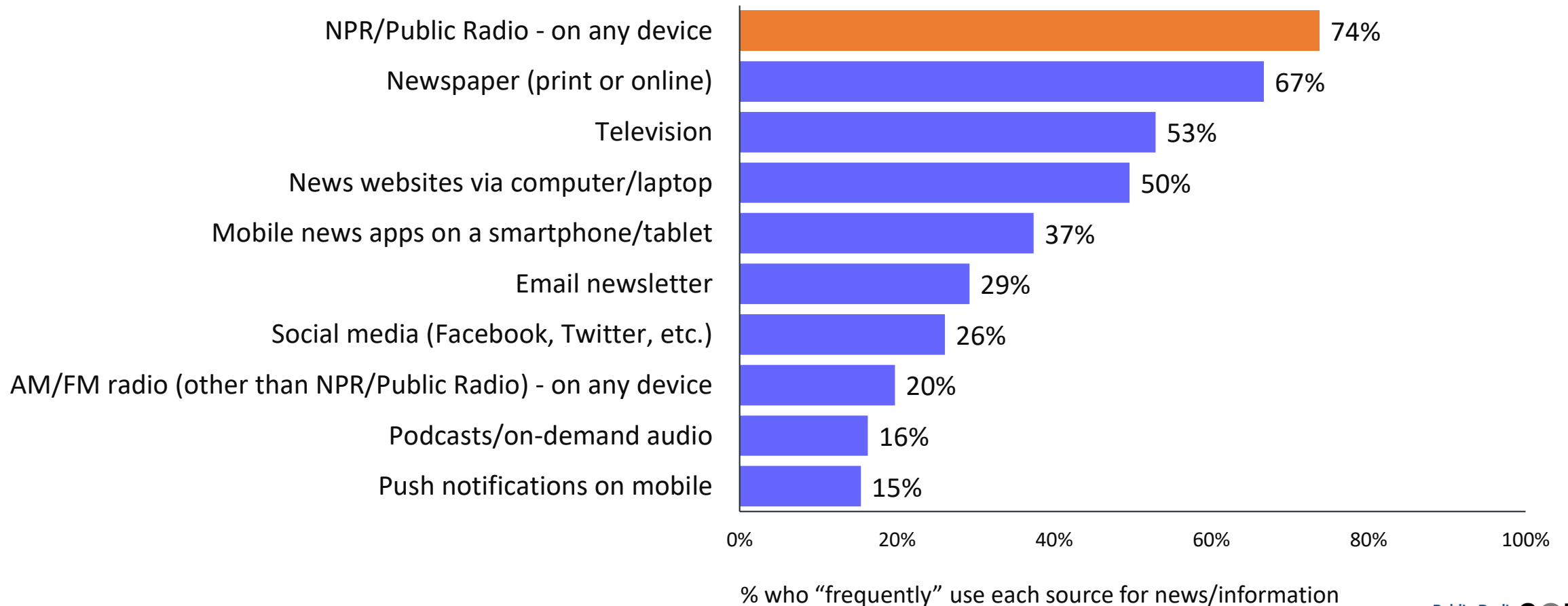
PRTS 2019



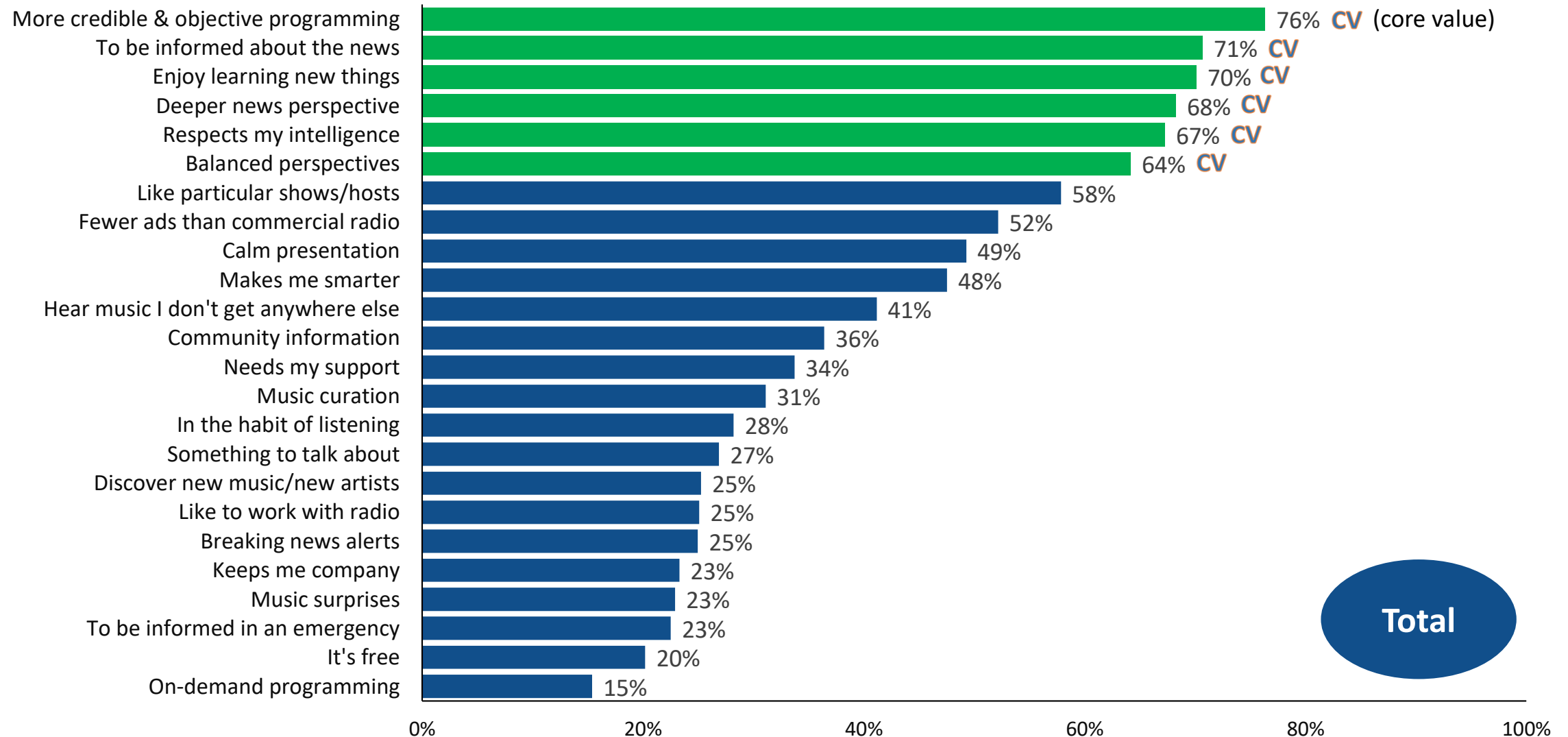
Average age: 61.8

Public Radio (NPR) Leads the Way In Access and Discovery

“How often do you use each of the following to access/discover news or information?”

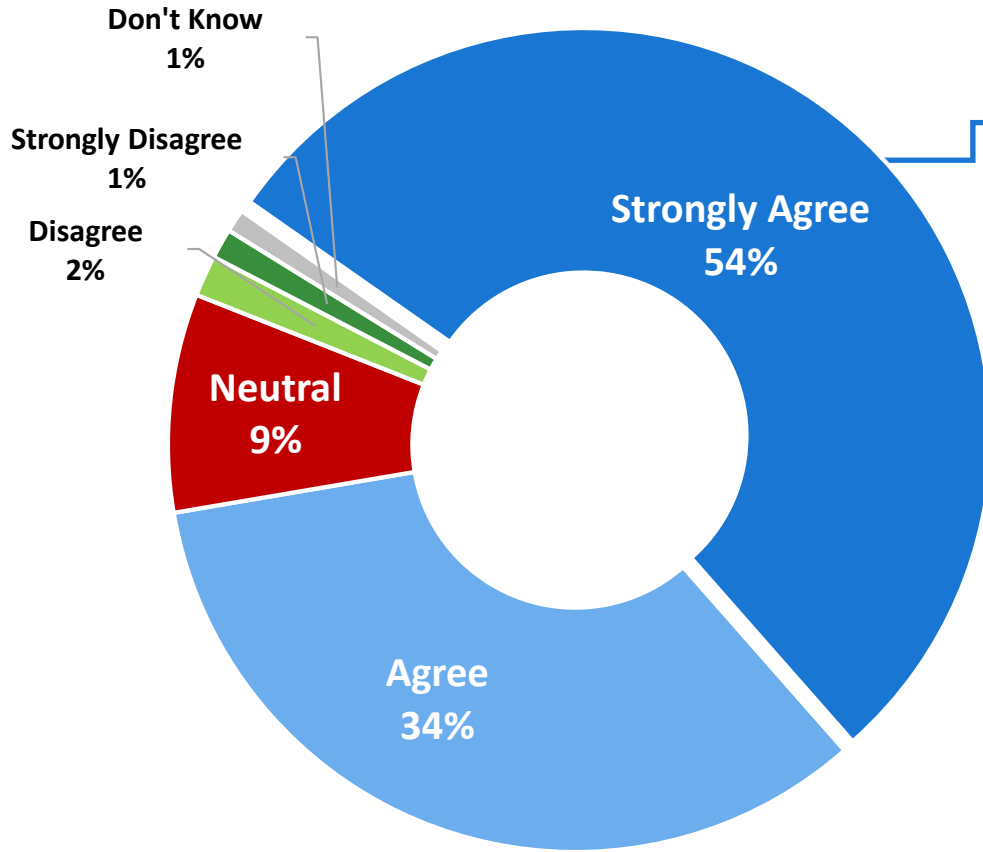


Main Reasons For Listening to Public Radio

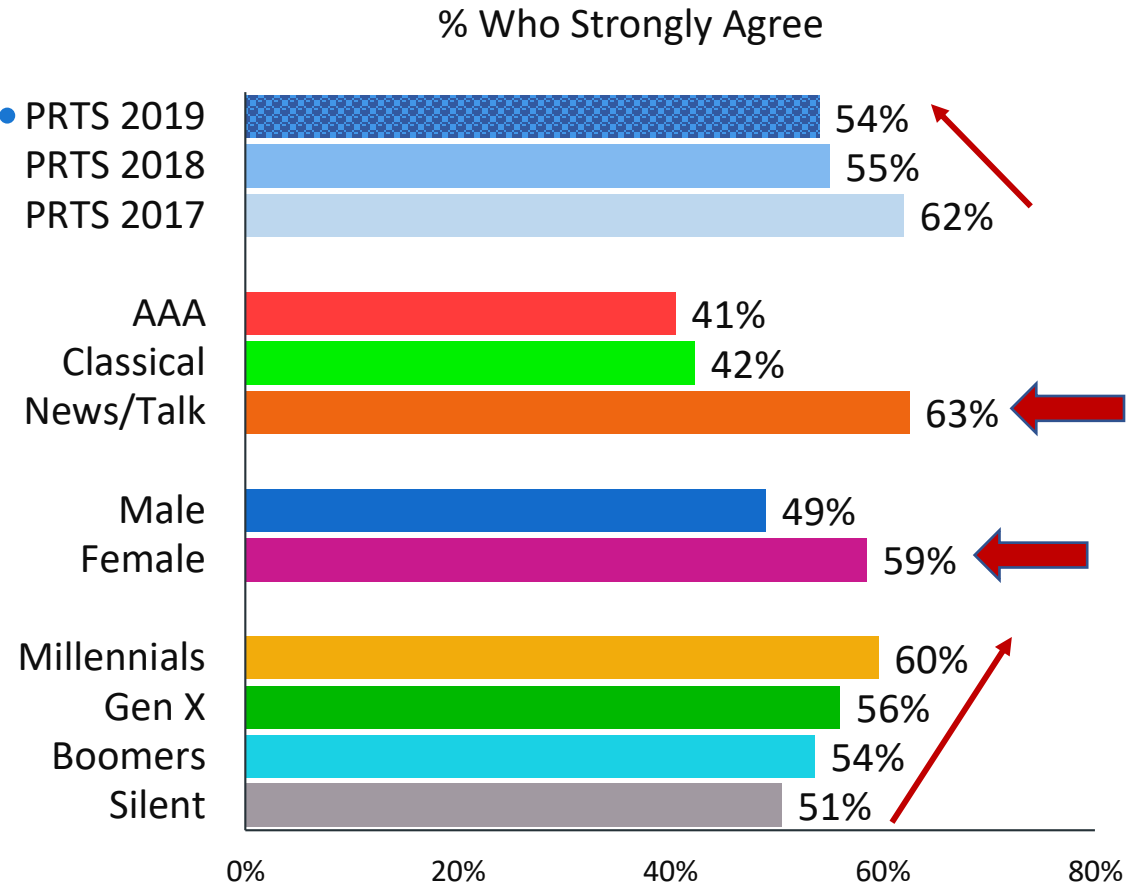


Among those who listen to AM/FM radio, % who say
this is a main reason they listen to public radio

Trust in Public Radio Is Strong, Especially Among News/Talk Fans

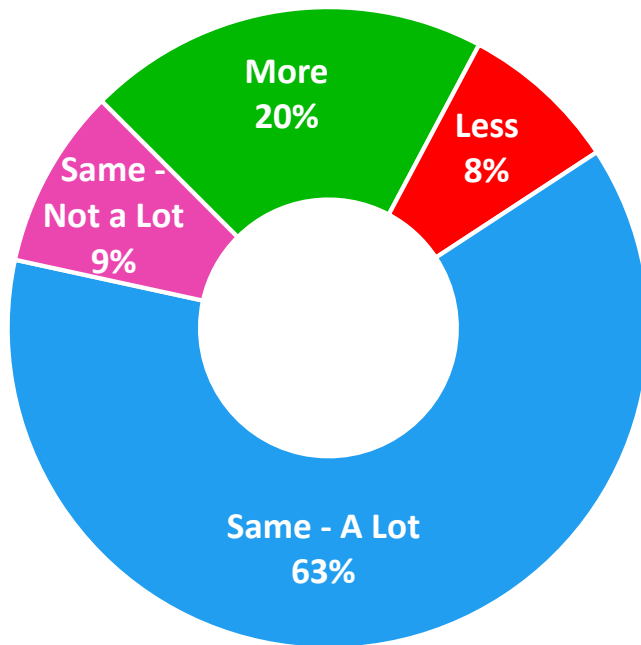


"I trust public radio"

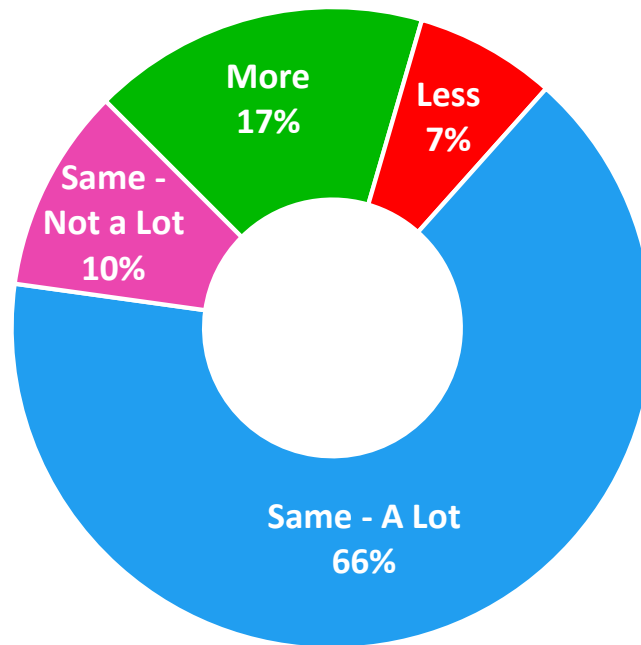


Public Radio Listening Momentum Has Slipped

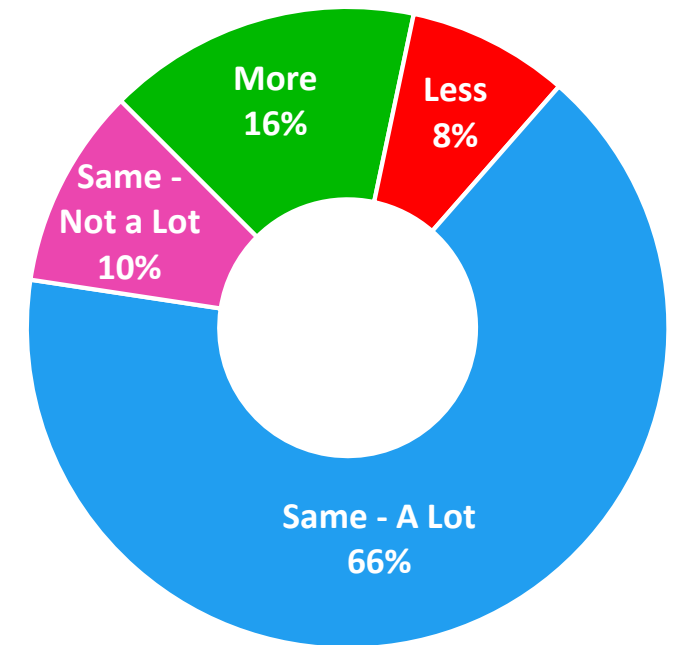
PRTS 2017



PRTS 2018

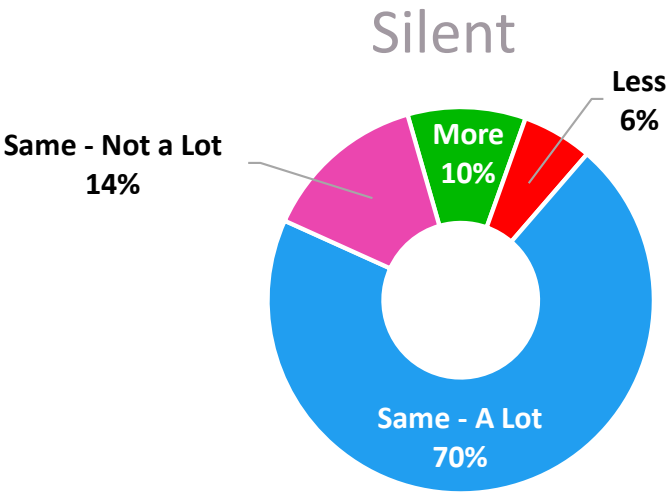
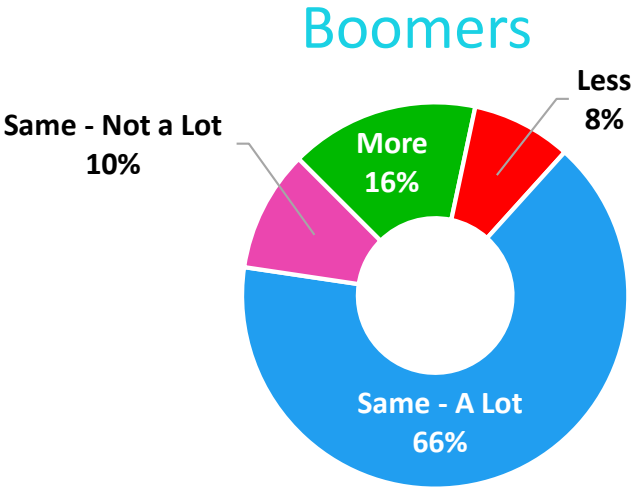
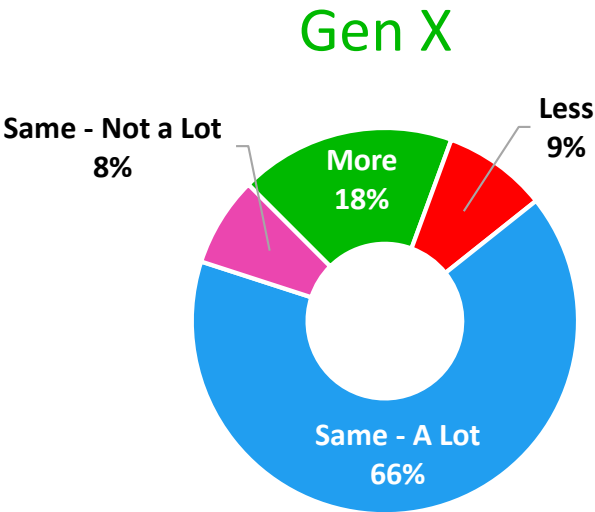
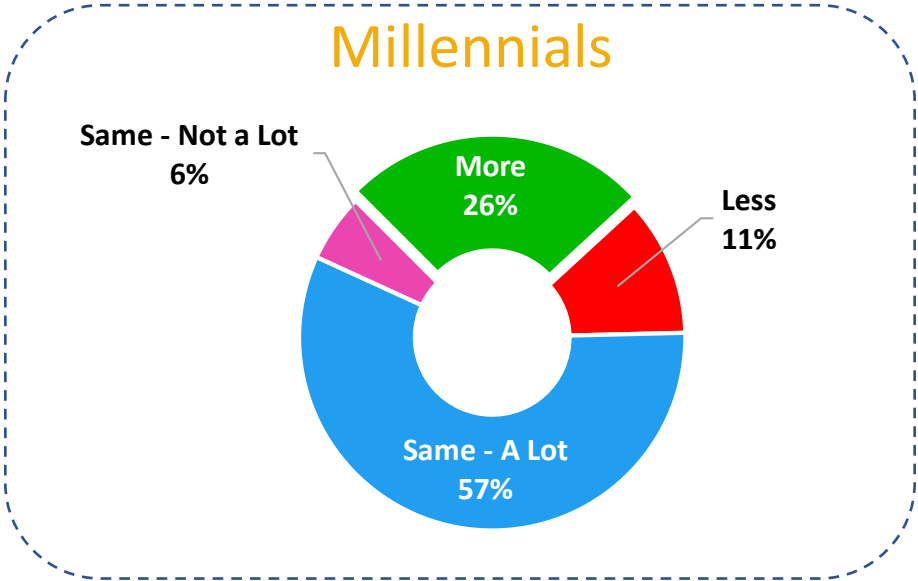


PRTS 2019



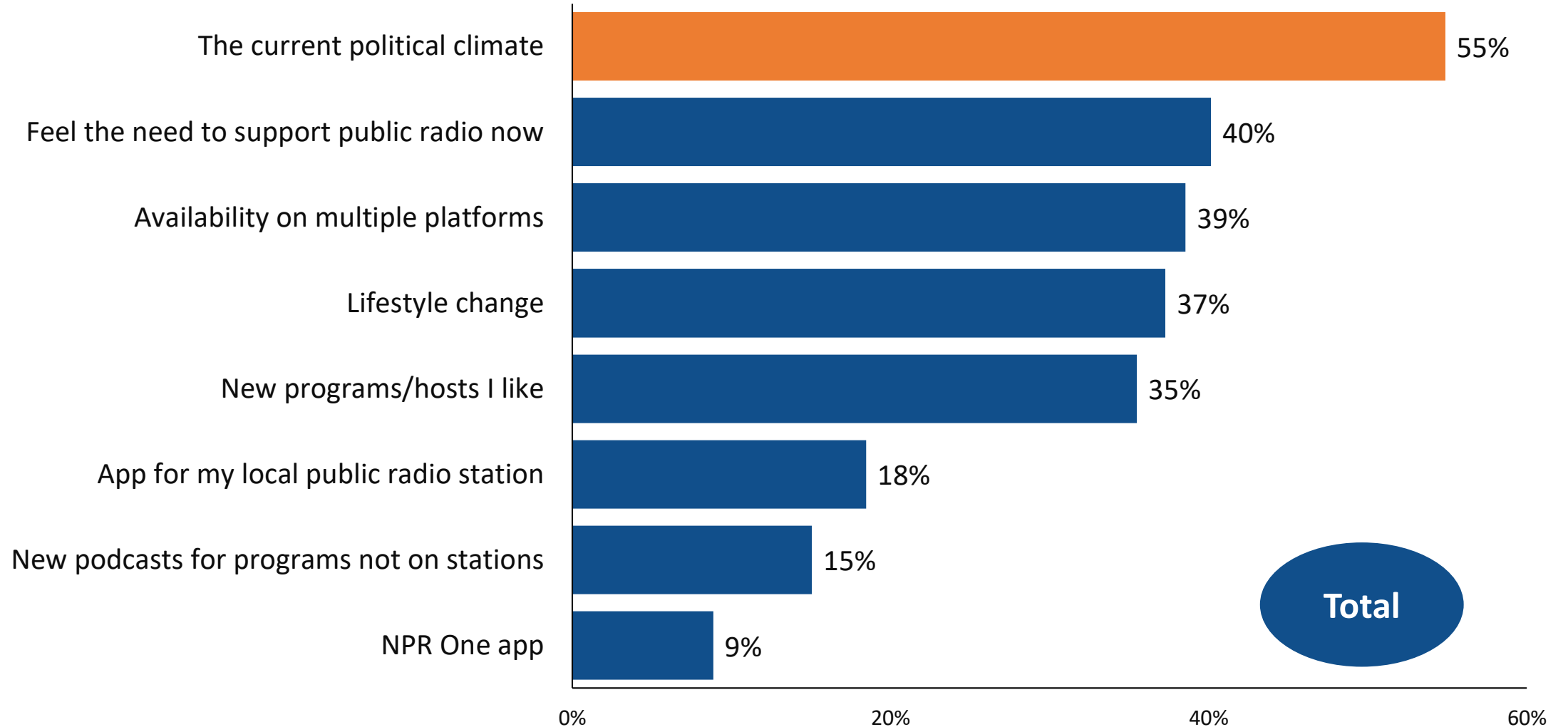
Among those who listen to AM/FM radio

Public Radio Listening Momentum Is Strongest Among Millennials



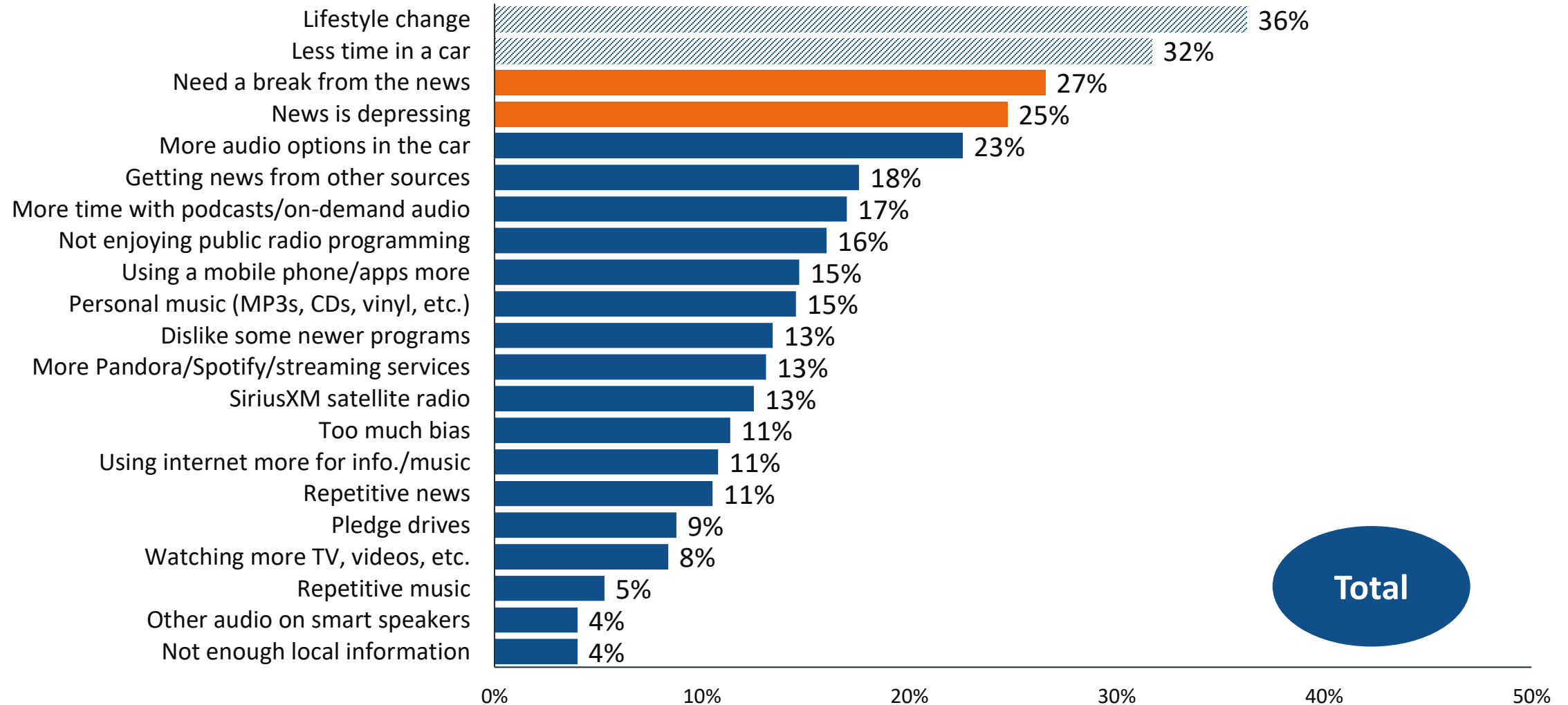
Among those who listen to AM/FM radio

Main Reasons For Listening to Public Radio More



Among the 16% who say they are listening to public radio more in the past year,
% who say this is a main reason they listen more

Main Reasons For Listening to Public Radio Less

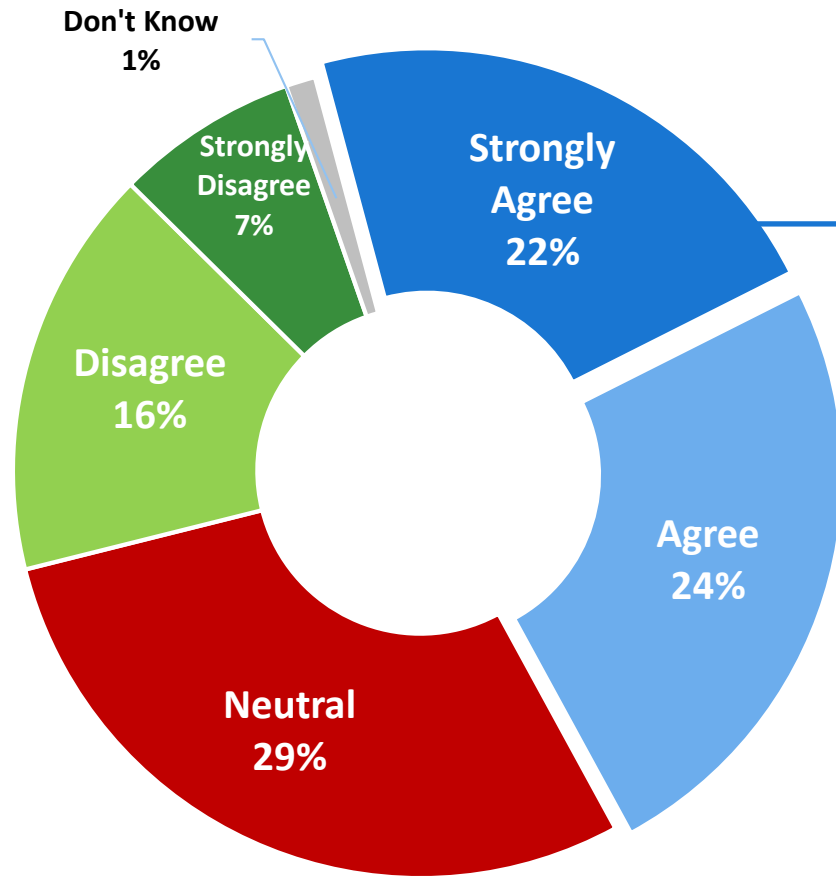


Among the 8% who say they are listening to public radio less in the past year,
% who say this is a main reason they listen less

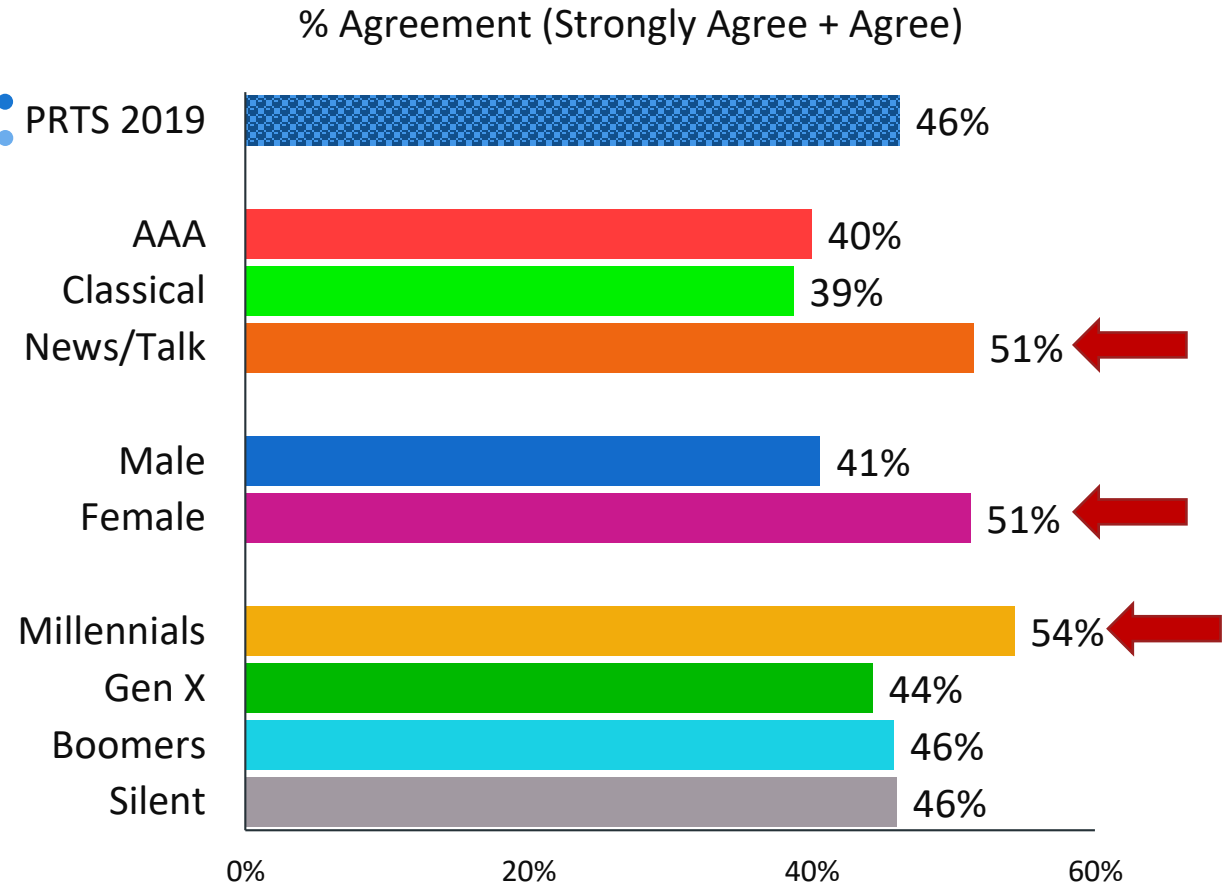


Trump Bump or Trump Slump?

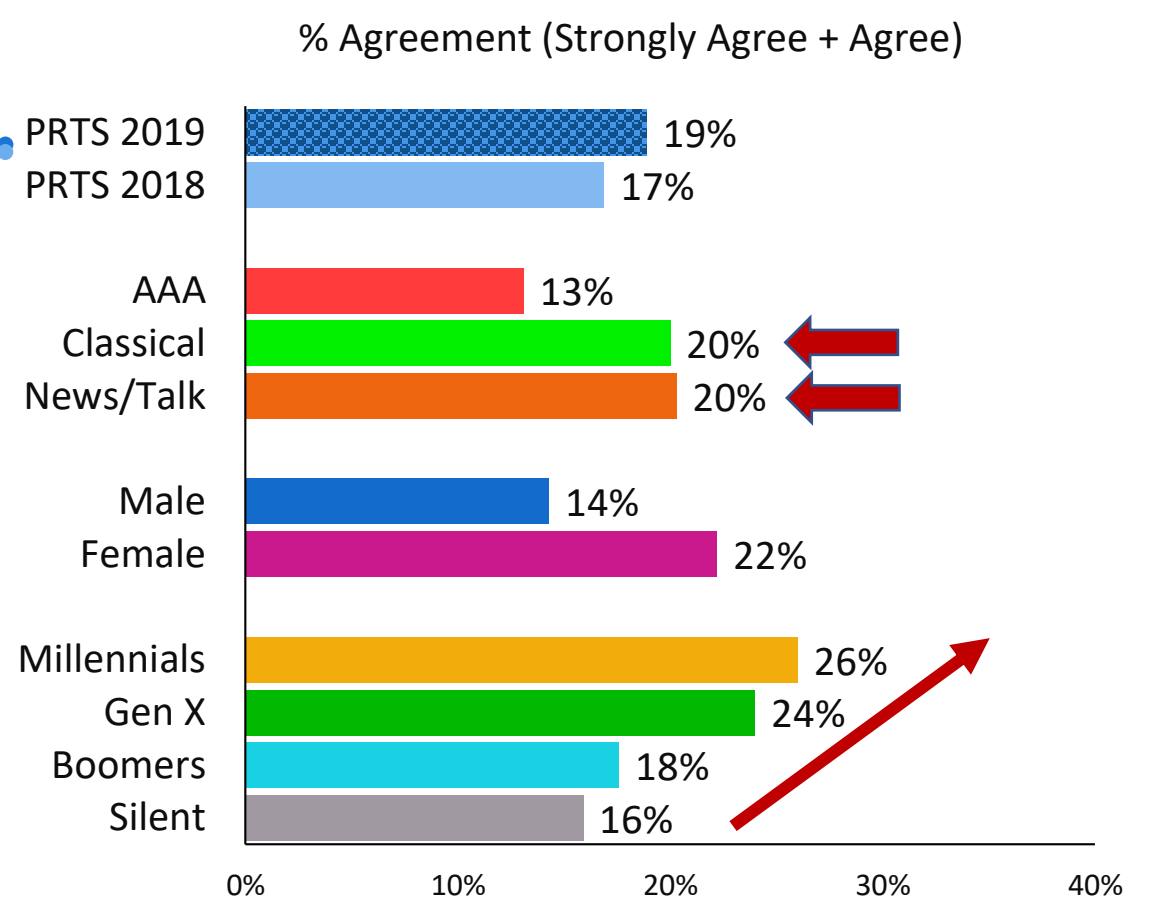
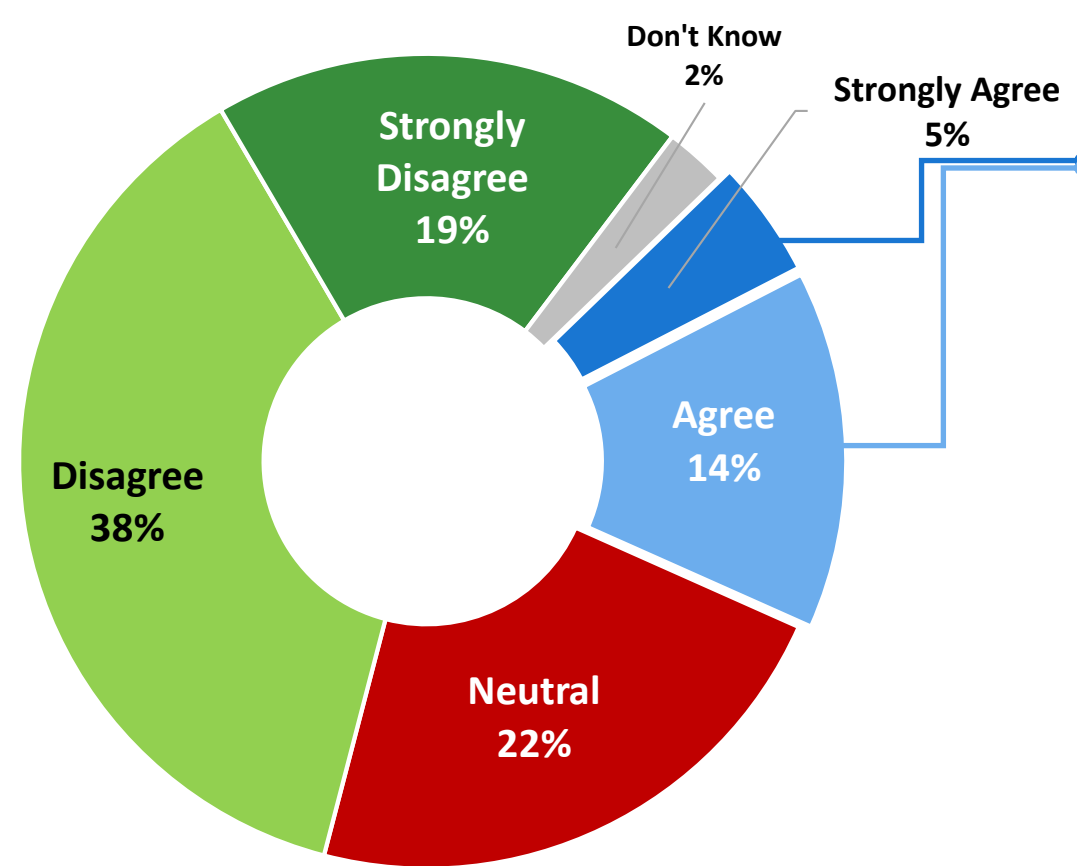
The Current Political Climate Is a Strong Driver of Increased Public Radio Listening, Particularly Among Females and Millennials



*"As a result of the current political climate,
I'm listening to more public radio"*



About One in Five Says They Are Spending Less Time With Public Radio Because They More Often Need a Break From the News

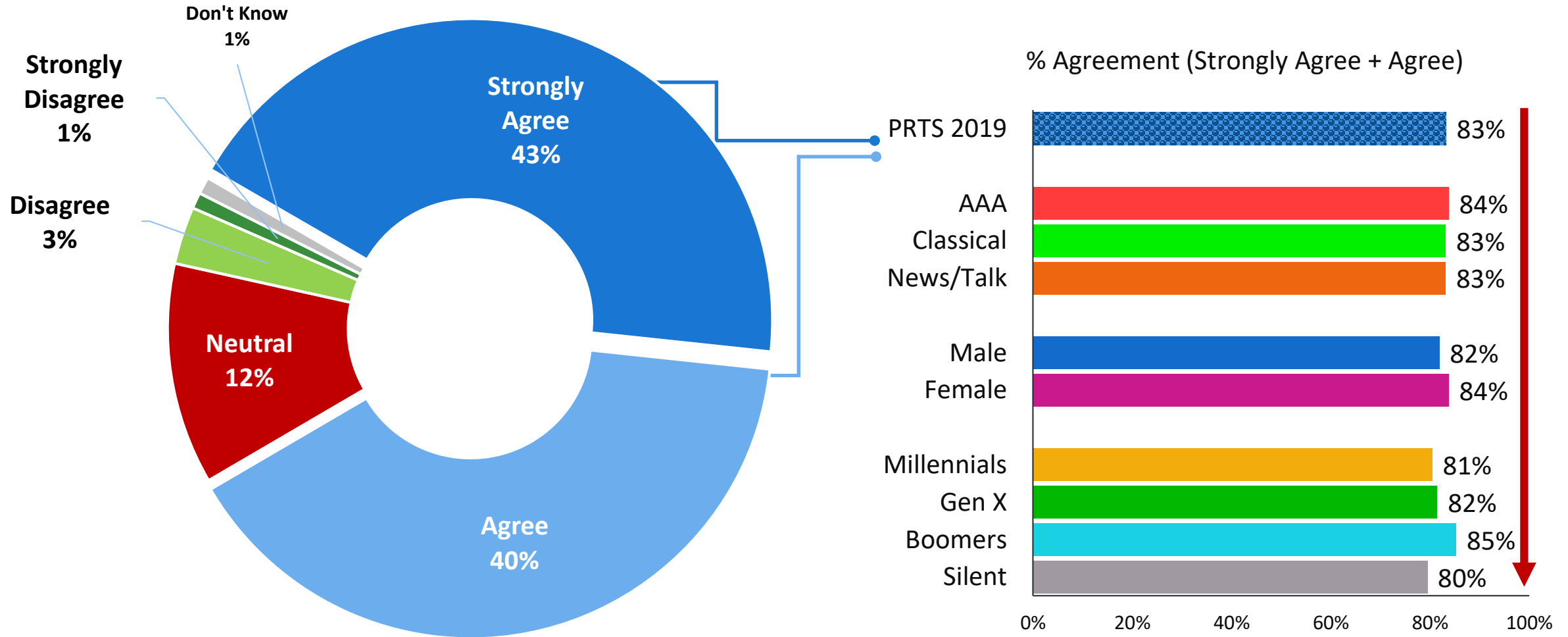


"I find myself spending less time with public radio because I increasingly need a break from the news"



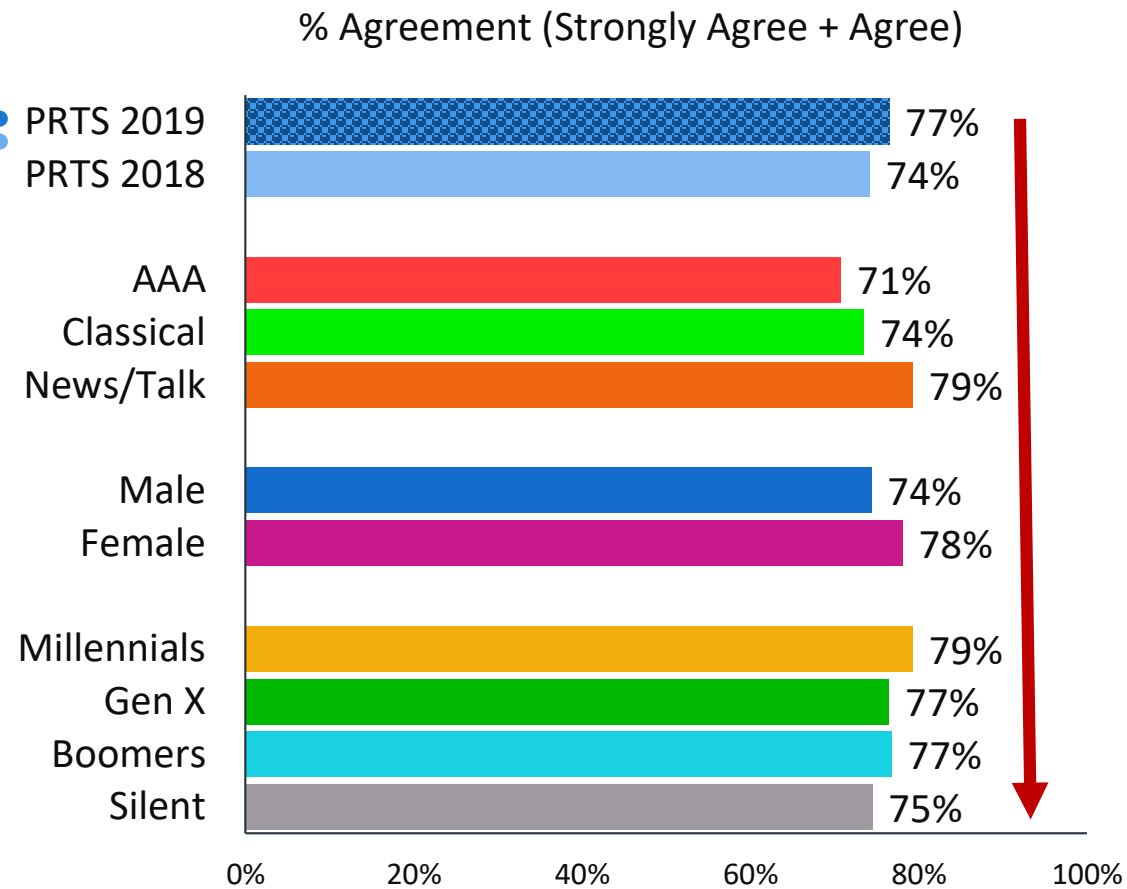
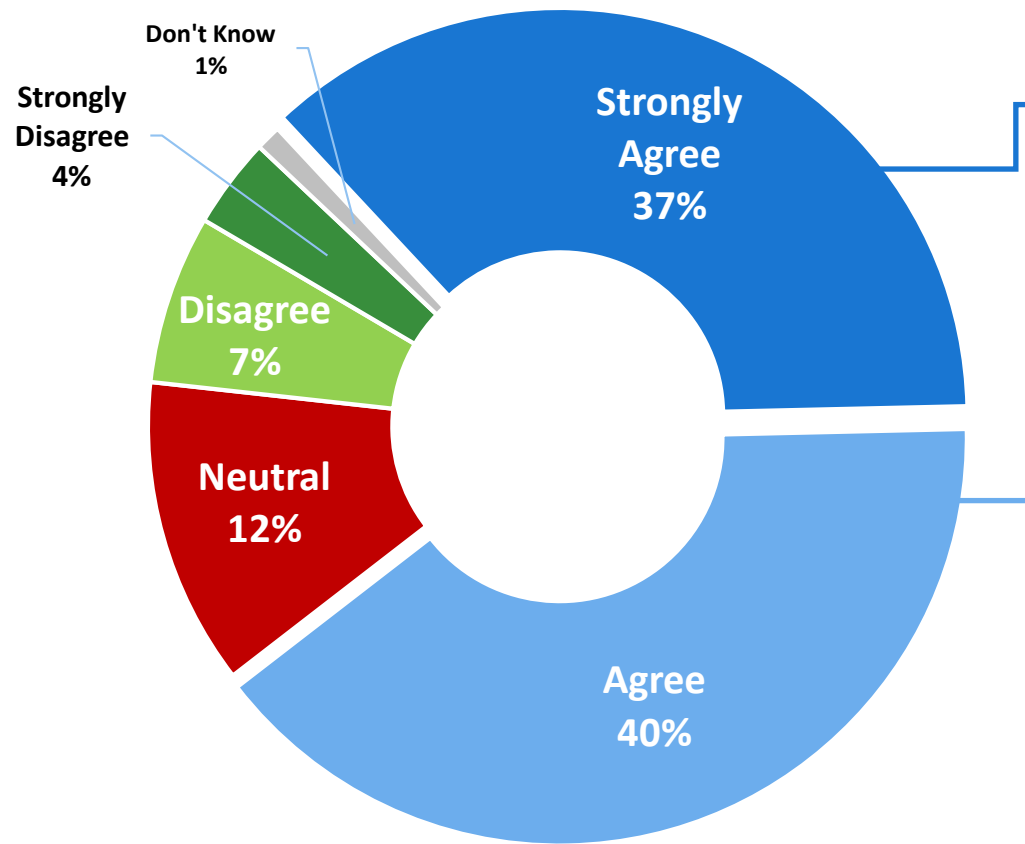
Privacy and Trust

Most Express Concern Over Use of Their Personal Data by Tech Companies



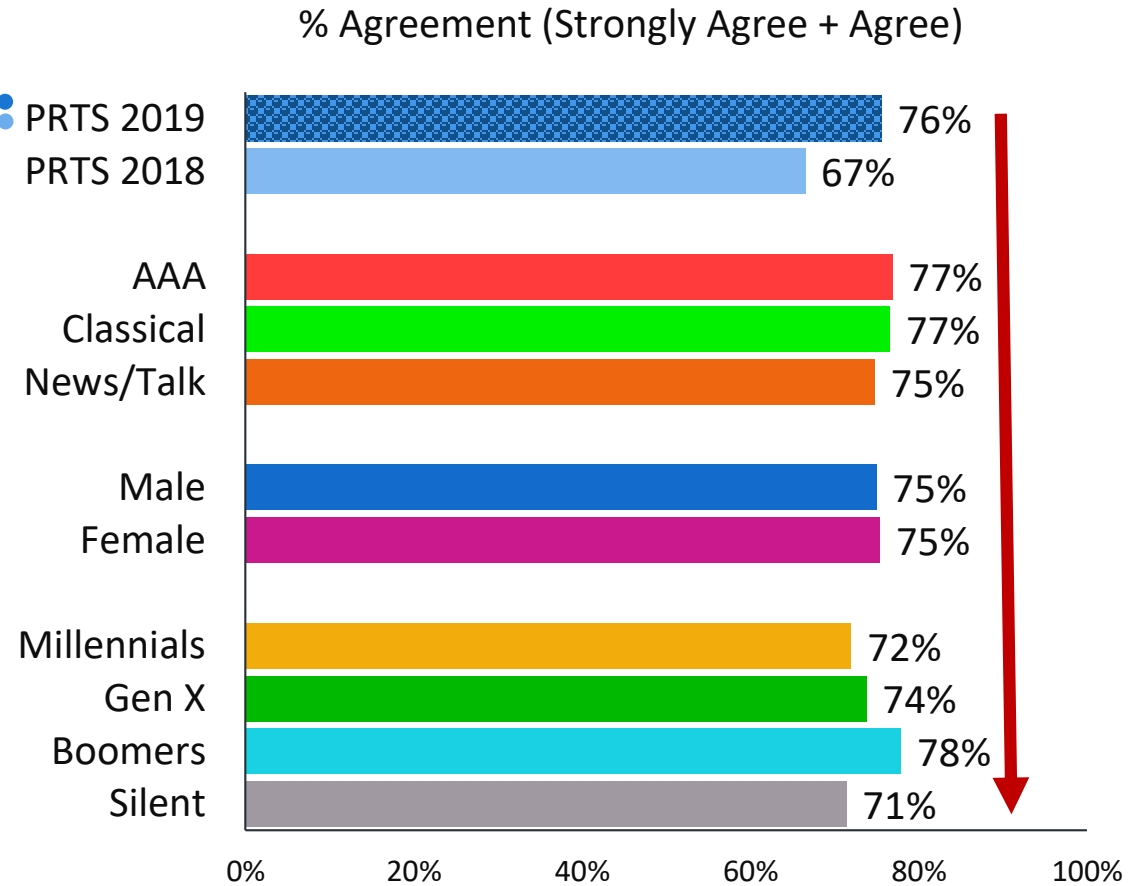
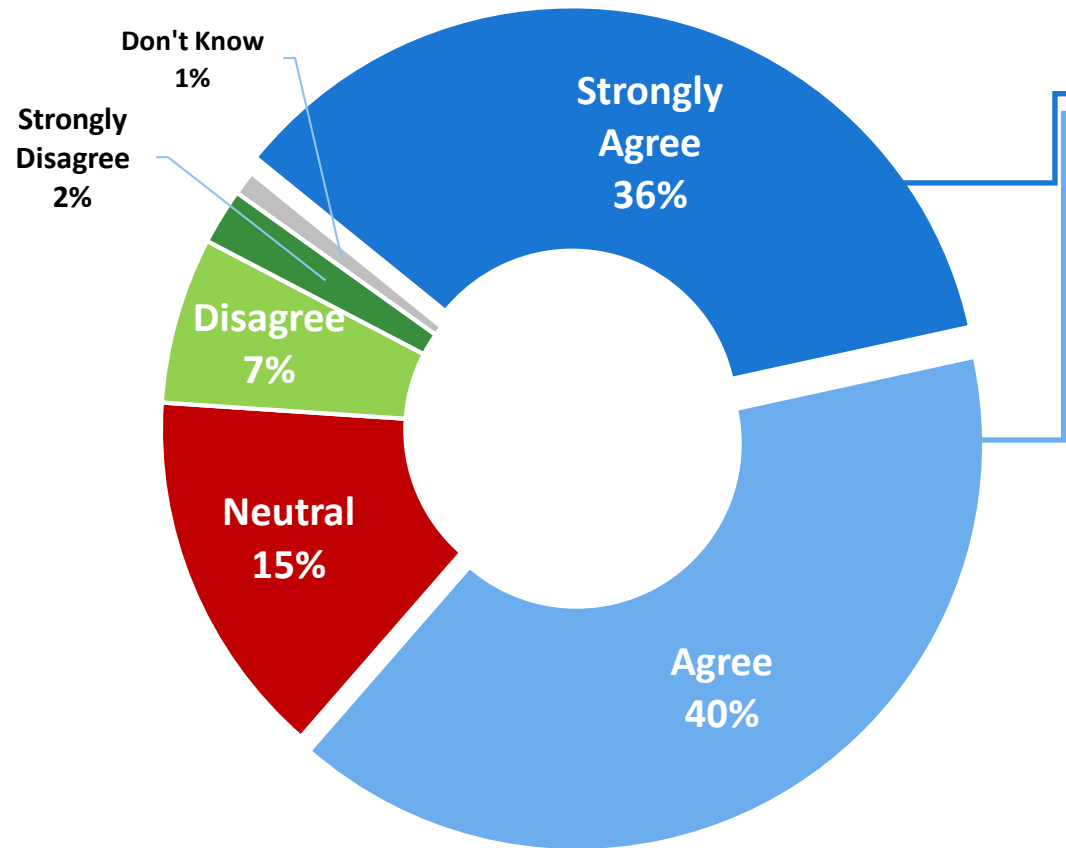
"I'm concerned about the ways in which tech companies are using my personal data"

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

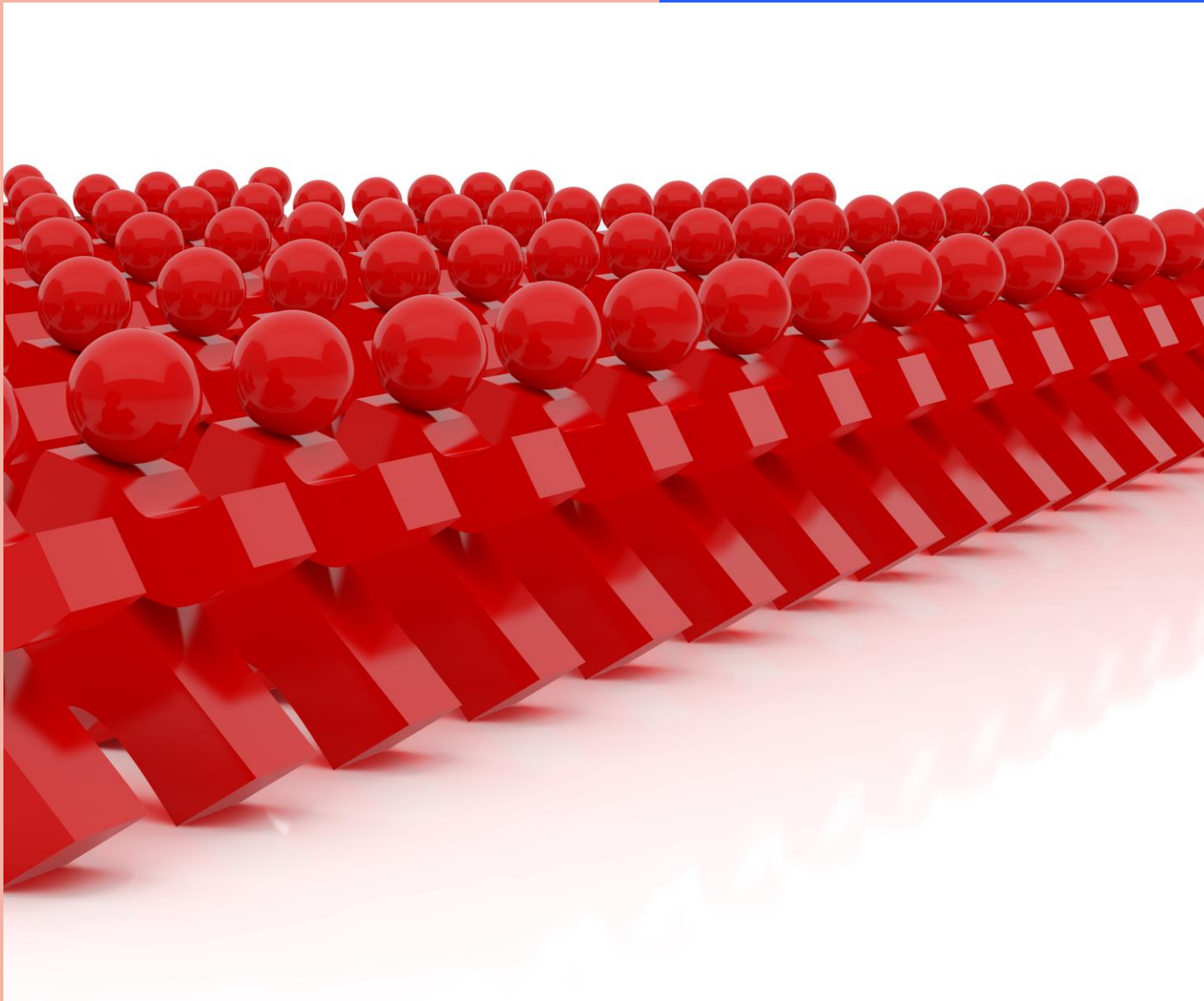


"I find myself looking more closely at the source of news articles recently due to the proliferation of so-called 'fake news'"

Three in Four Are Concerned With Their Private Information Being Compromised, Up Year-Over-Year



"I am concerned with my private information being compromised"



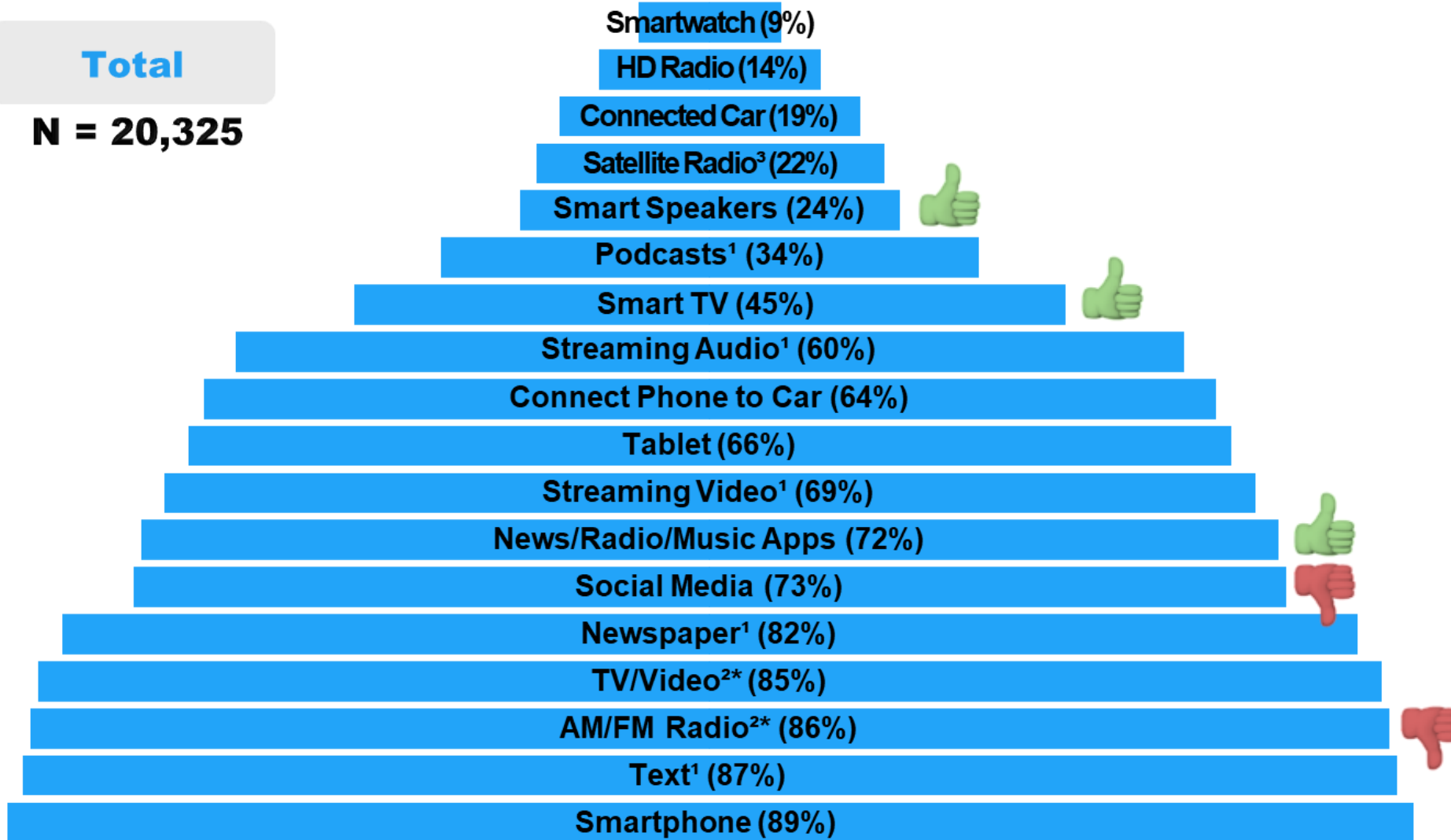
The March To Digital



Media Pyramid 2019

Total

N = 20,325



Total PRTS 2018
8%
15%
18%
21%
20%
35%
42%
60%
63%
68%
68%
67%
76%
83%
85%
89%
87%
89%

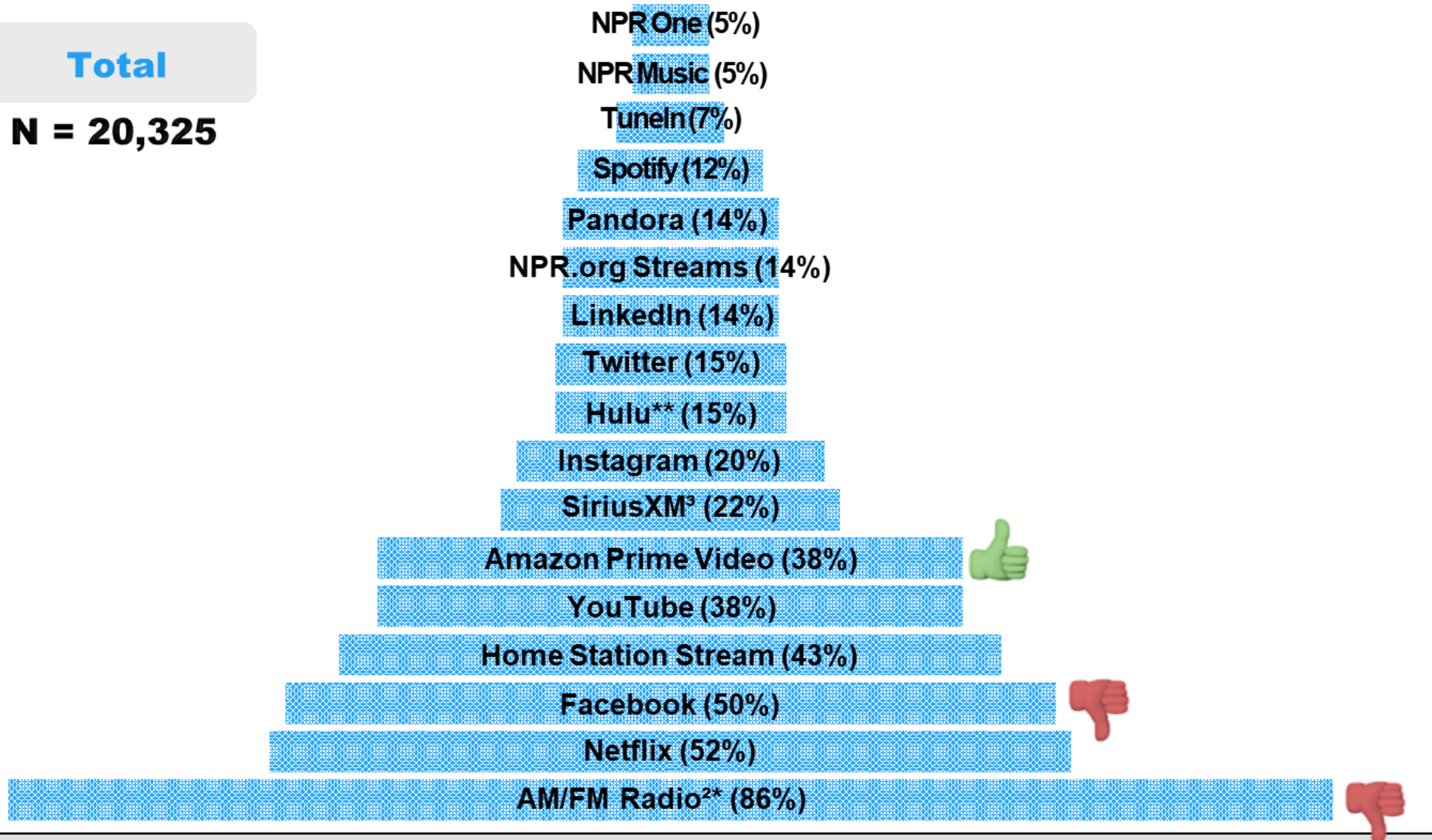
¹ Weekly or more ² 1+ hour per day ³ Paid & trial users * Any platform/device



Brand Pyramid 2019

Total

N = 20,325



**Total
PRTS 2018**

5%

5%

8%

13%

16%

15%

16%

16%

14%

19%

21%

32%

40%

43%

54%

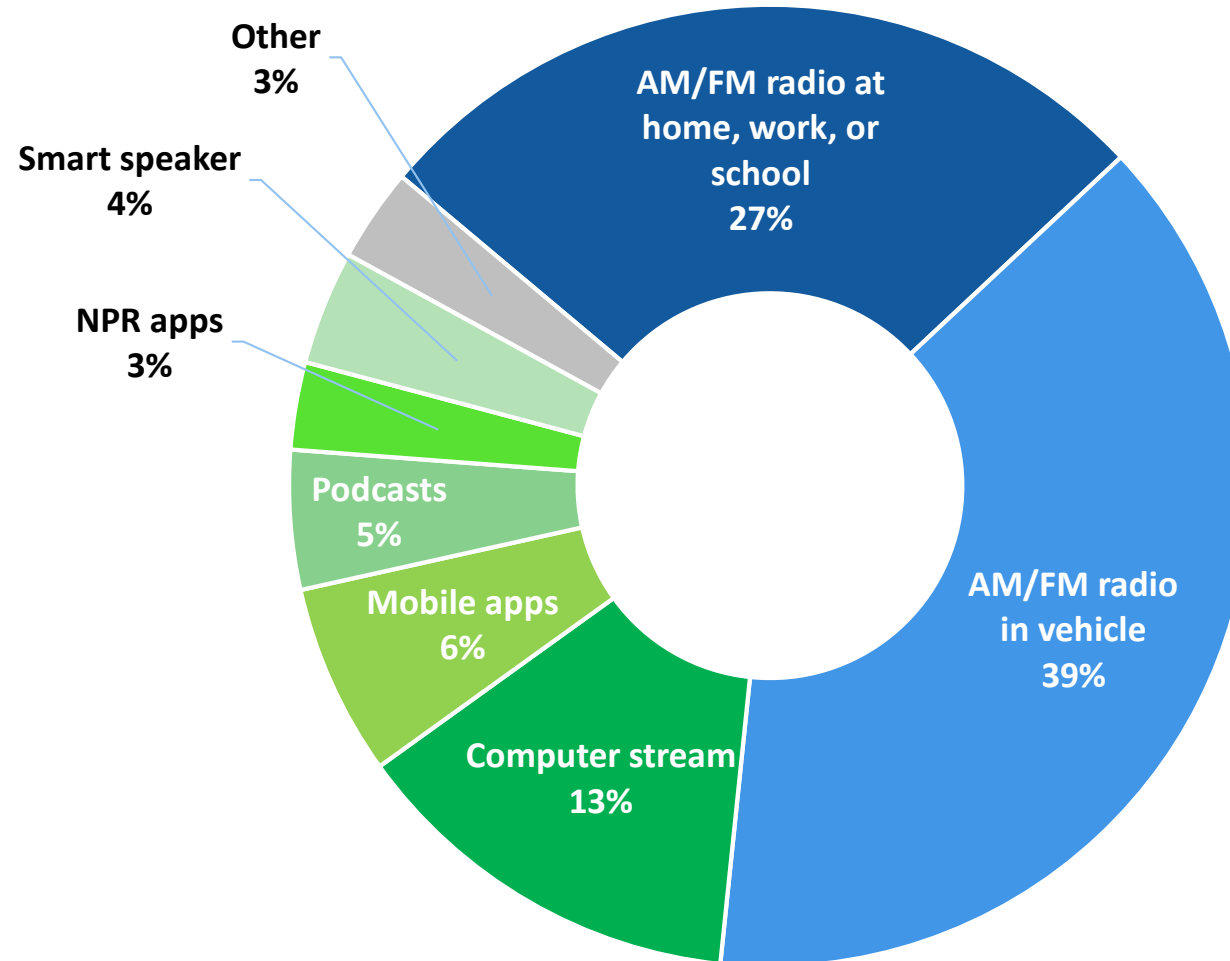
52%

89%

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

Home Station Listening Platforms

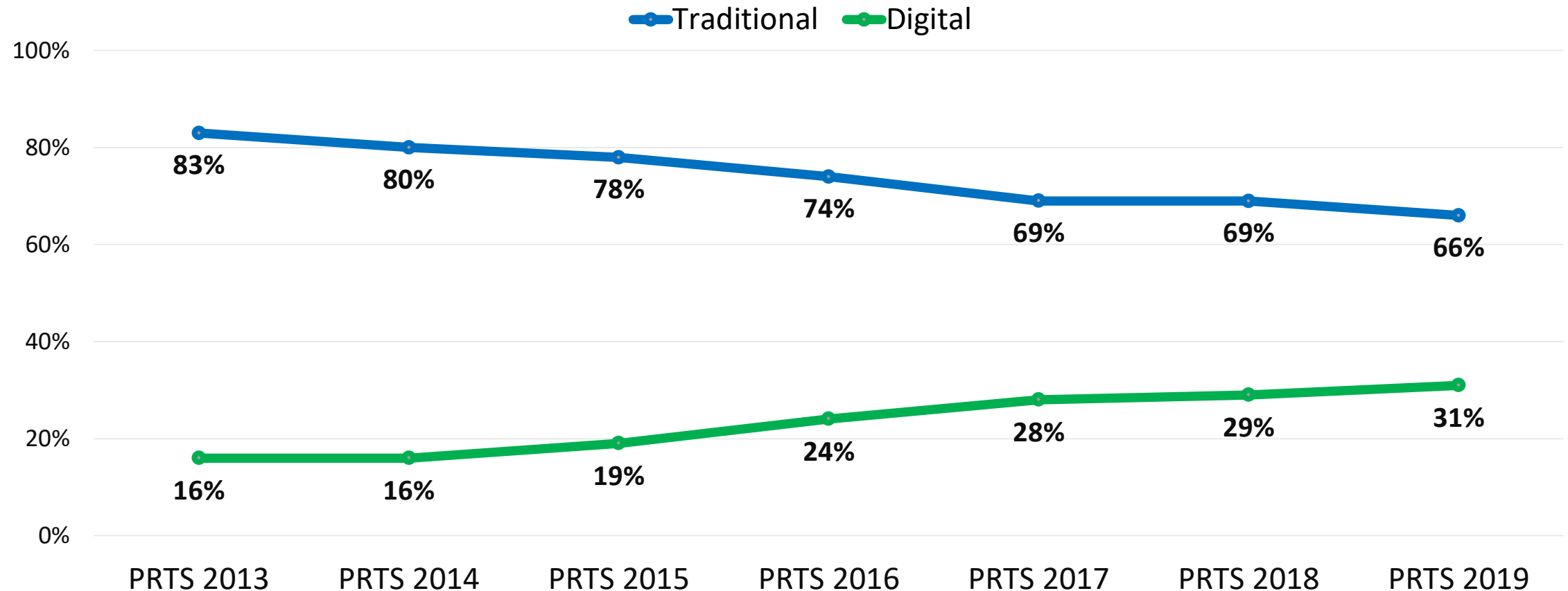
Total



Traditional – 66%
Digital – 31%

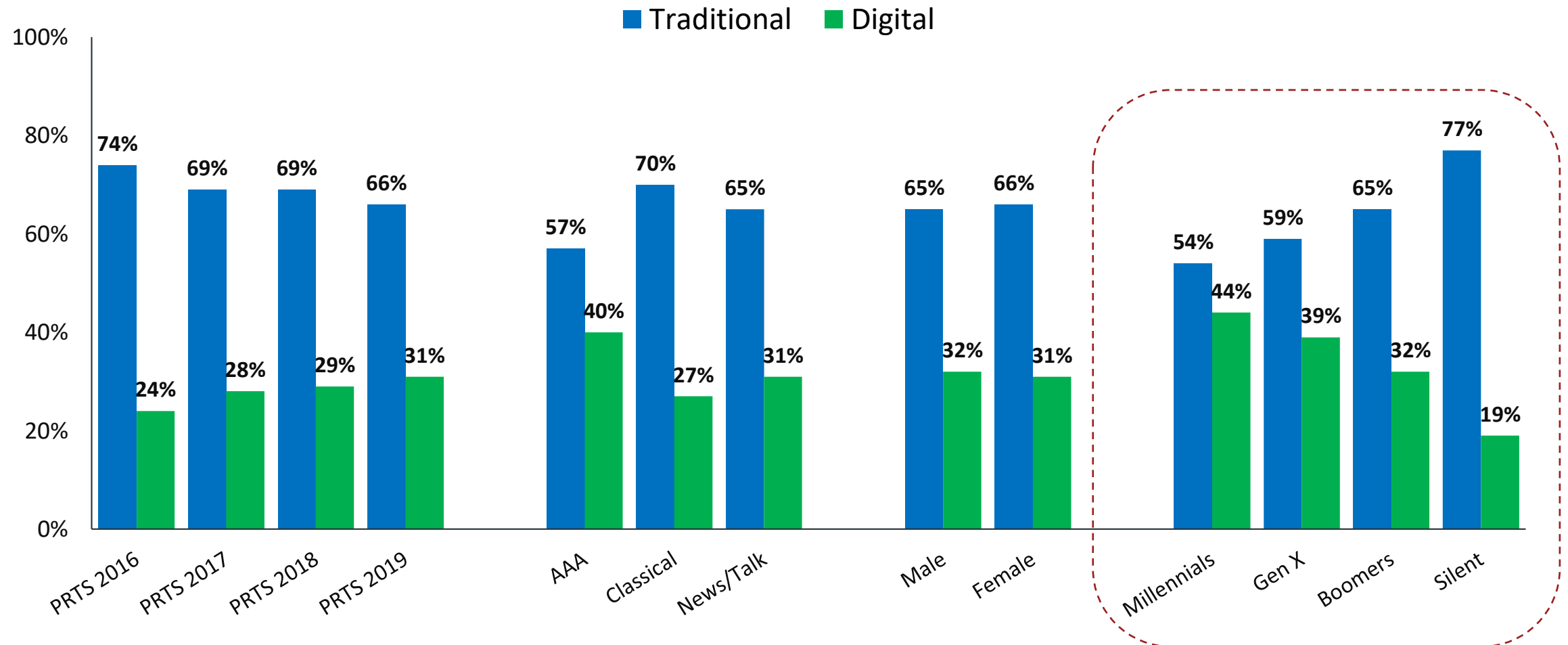
PRTS 2018
Traditional – 69%
Digital – 29%

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)

Home Station Listening Platforms: Traditional vs. Digital

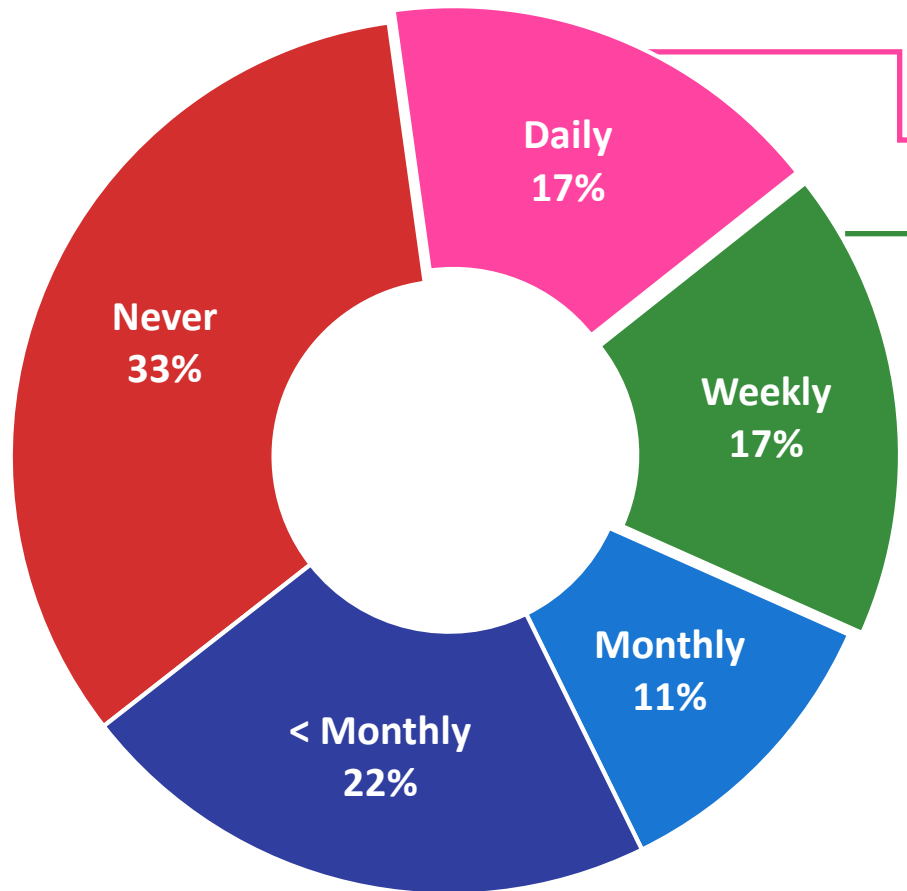


% of time spent with home station in a typical week via
traditional platforms (an AM/FM radio at home/school/work or in a vehicle)
vs. digital platforms (computer, mobile/NPR apps, podcasts, smart speaker)

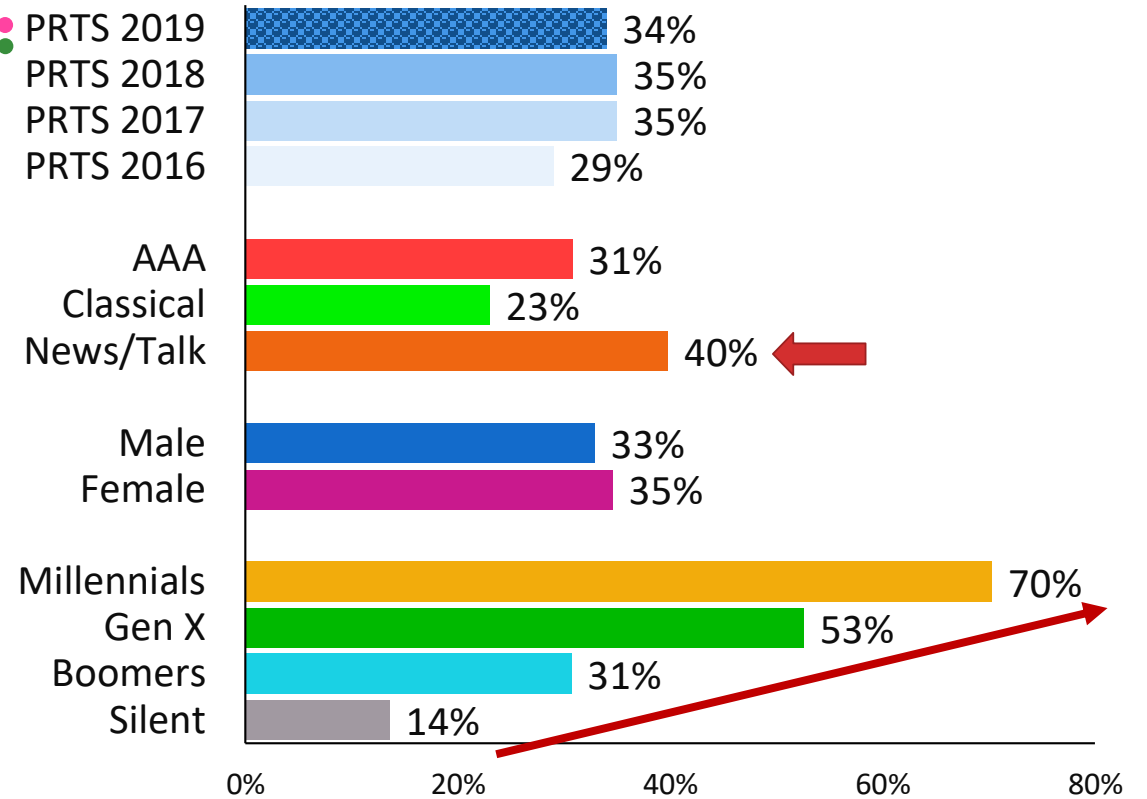


Podcasting and the On-Demand Experience

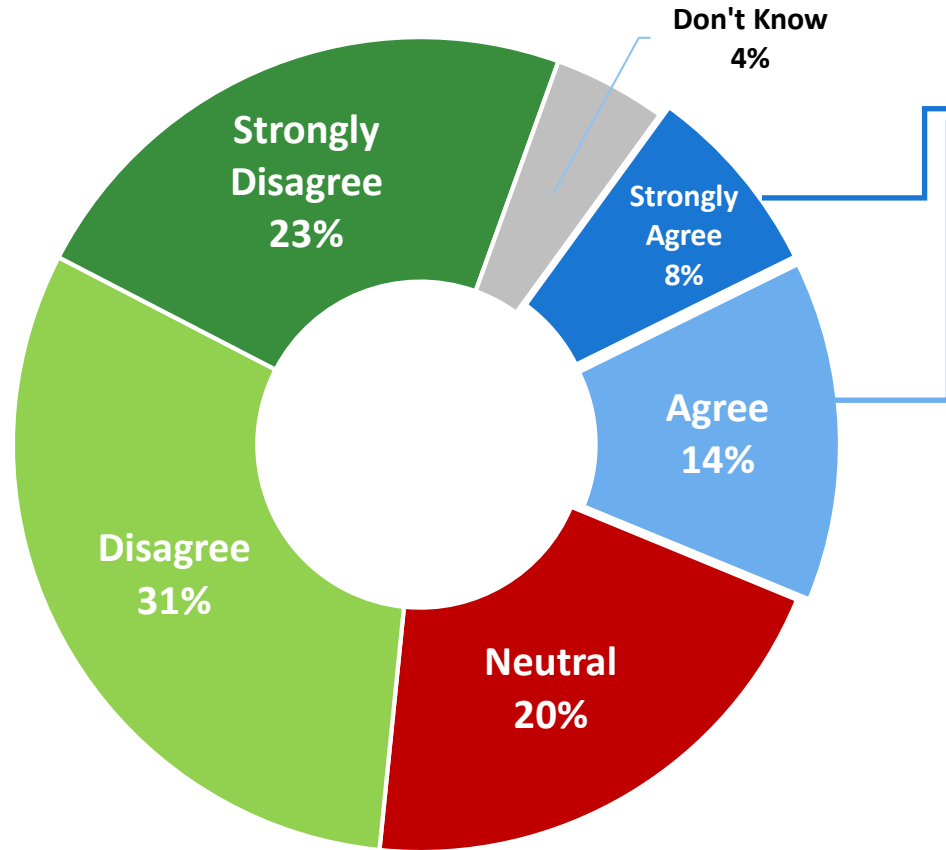
More Than One-Third Listen to Podcasts/On-Demand Audio Weekly or More Often, Led by Millennials and News/Talk Fans



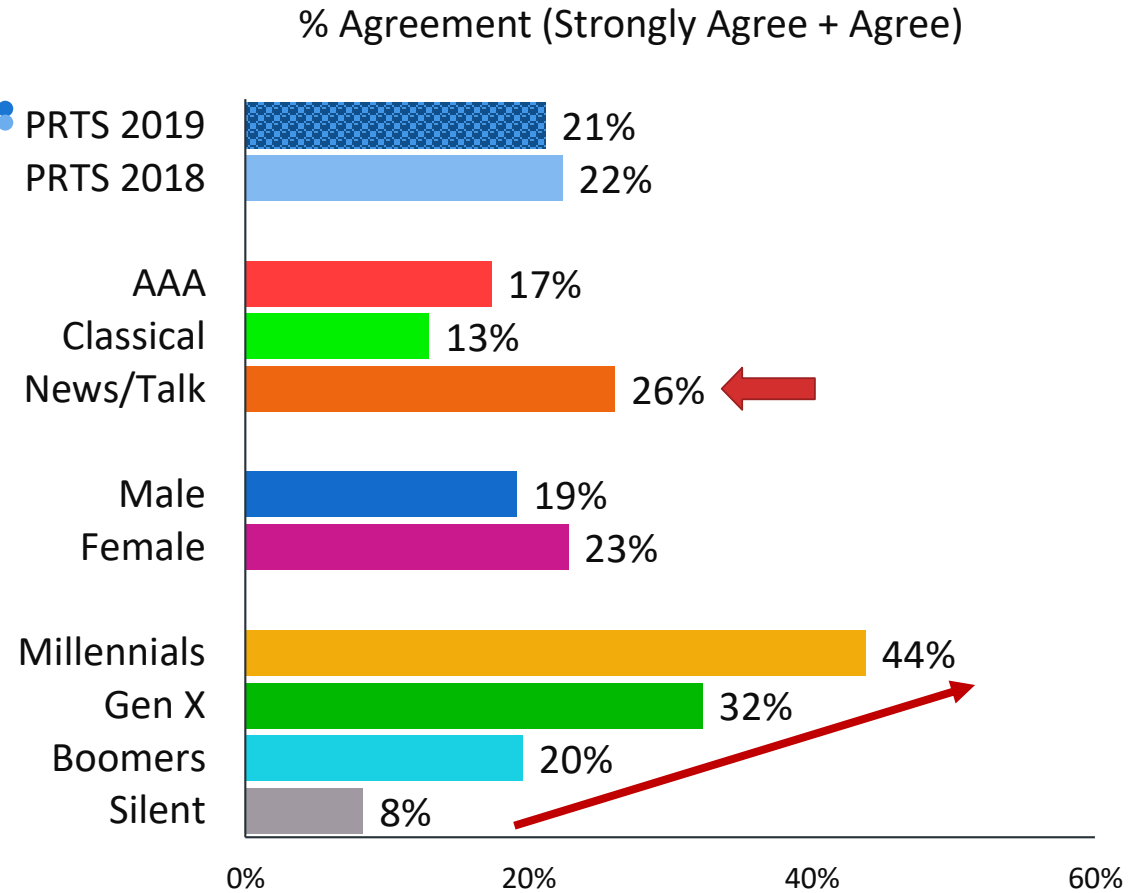
% Who Listen to Podcasts/On-Demand Audio Weekly or More



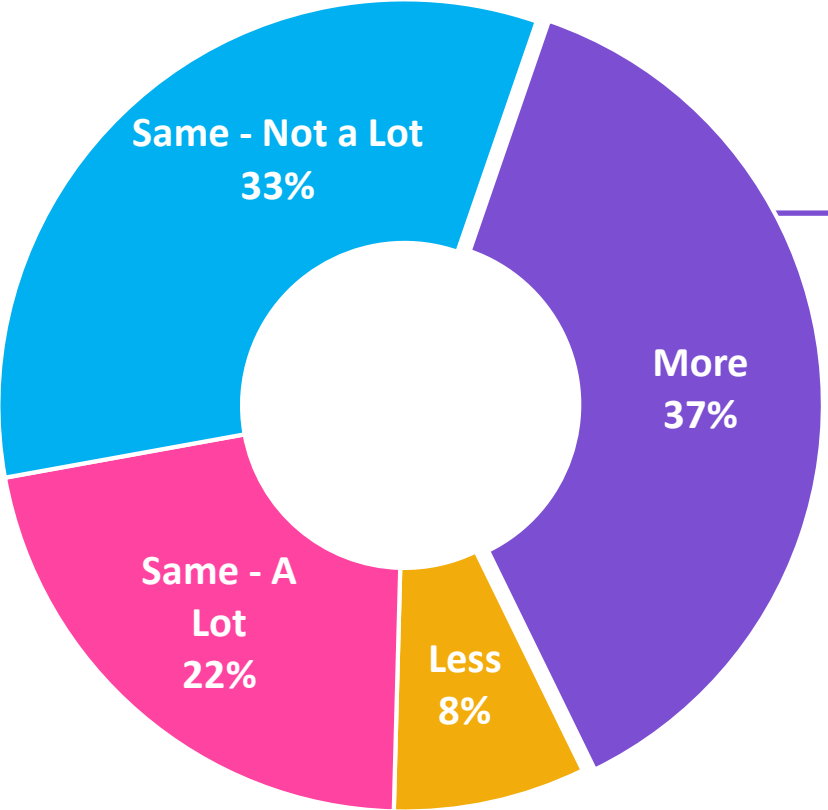
Led by Millennials and News/Talk Fans, More Than One-Fifth Are Listening to More Public Radio On-Demand



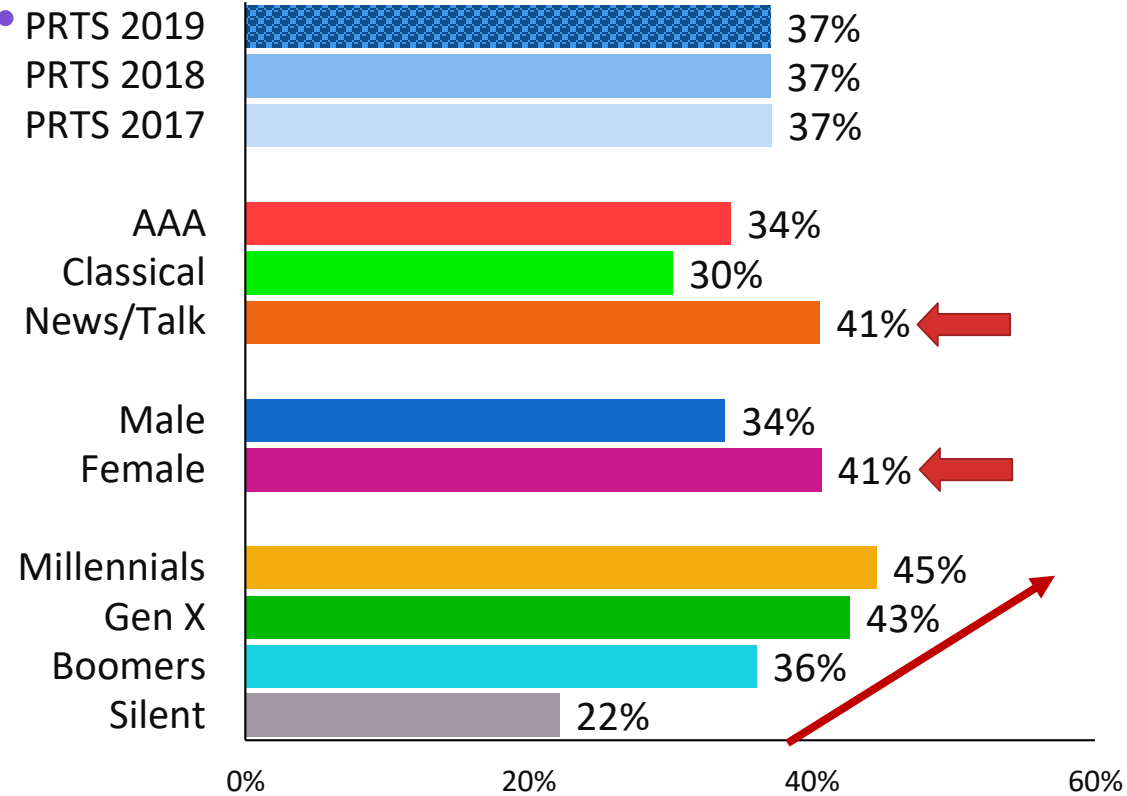
"I find myself listening to more public radio on-demand (podcasts, etc.)"



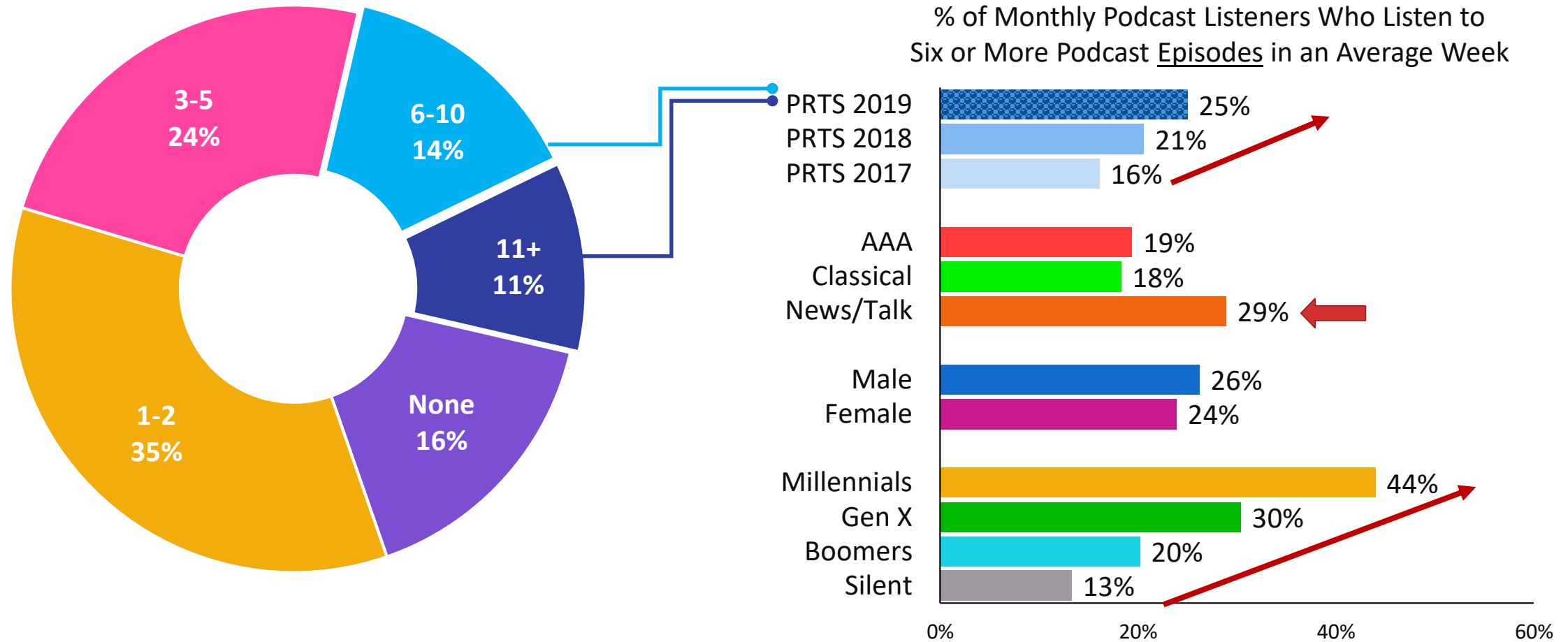
There Continues to Be Listening Momentum Among Podcast Users, With Women, Millennials and Gen X Leading the Way



% of Monthly Podcast Listeners Who Say They Are Listening to Podcasts/On-Demand Audio More in the Past Year

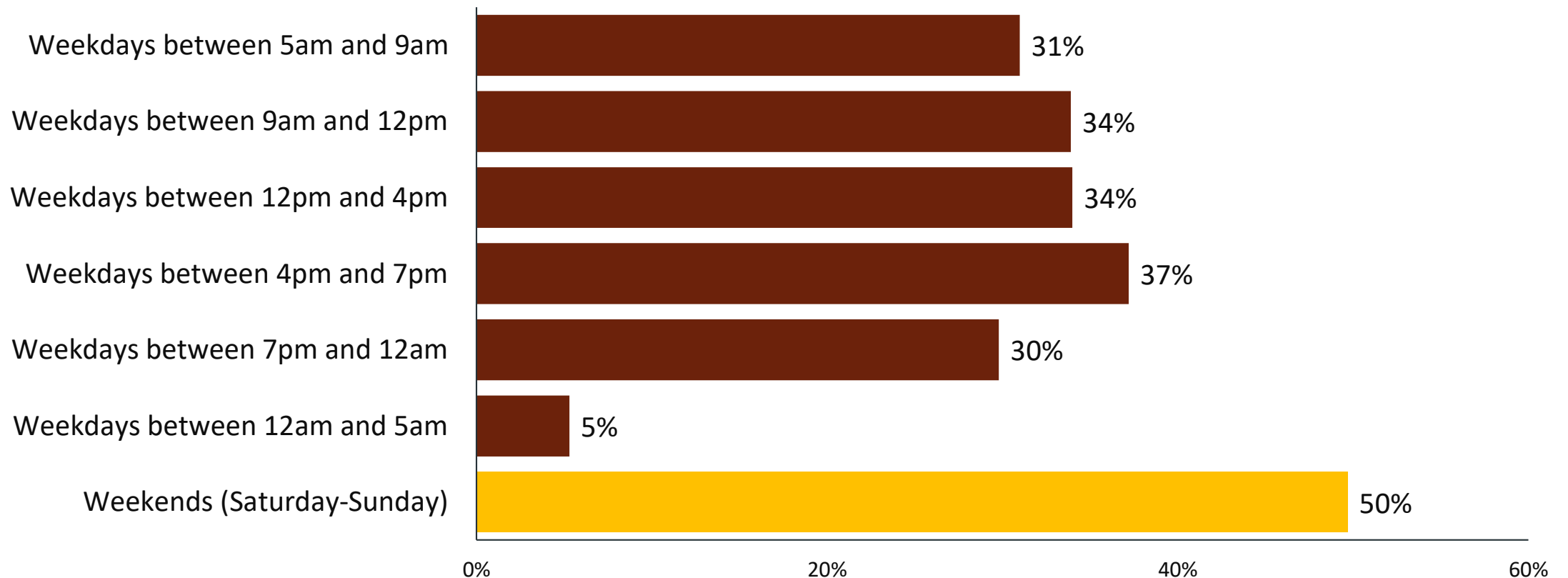


Heavy Podcast Listening Continues to Climb, With Millennials and News/Talk Fans Leading the Pace



Weekends Are the Peak Time for Listening to Podcasts

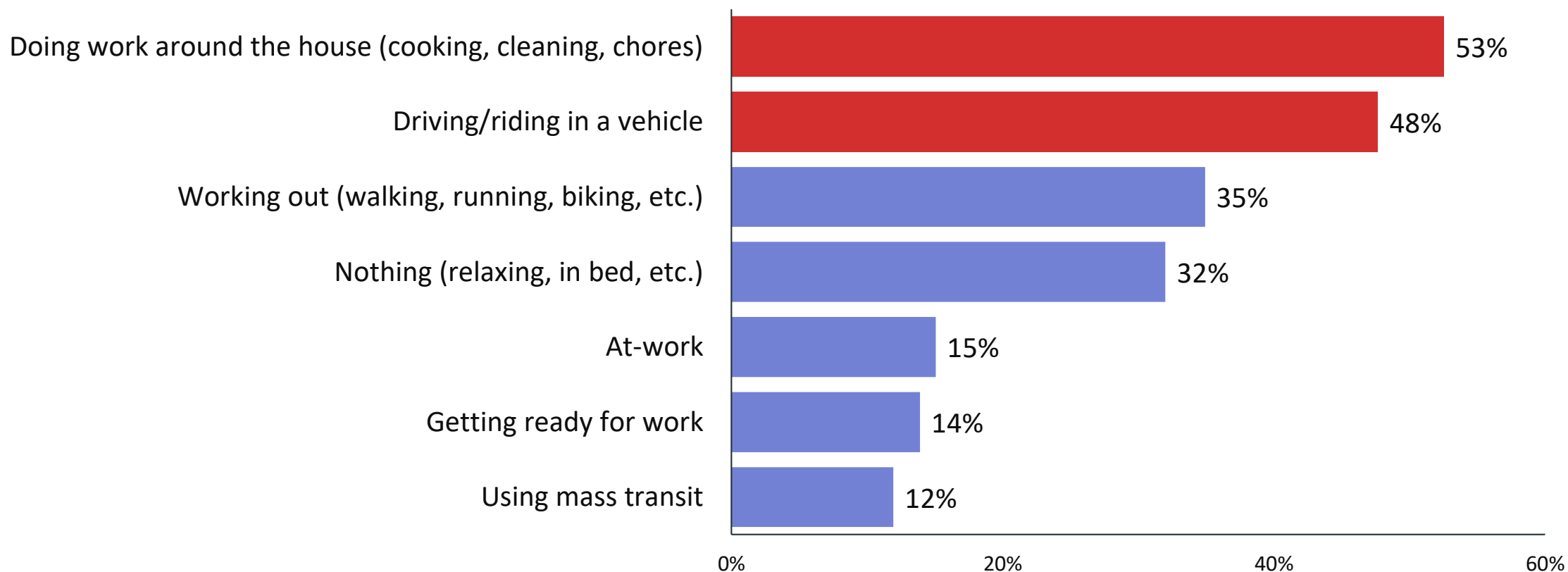
“During which of the following time periods do you typically listen to podcasts/on-demand audio?”



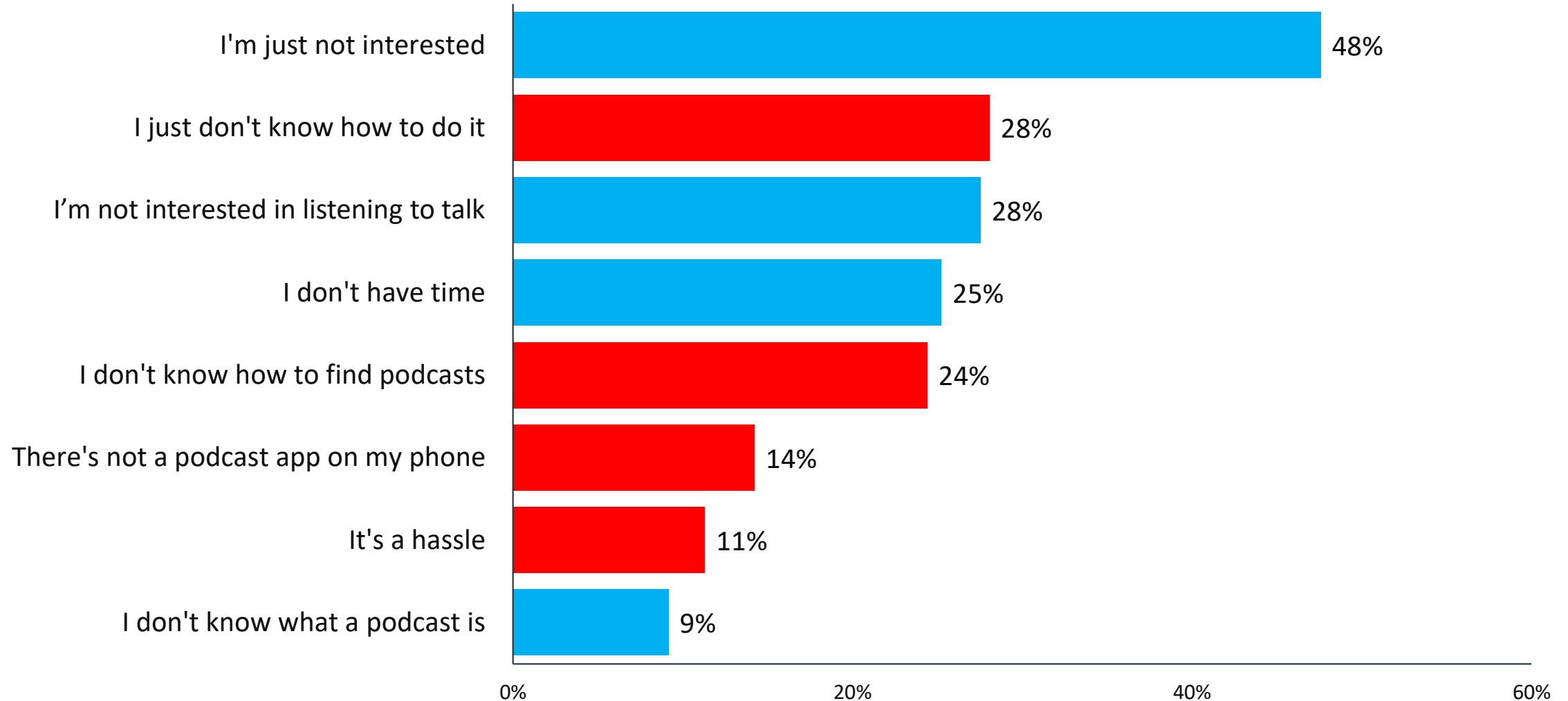
Among monthly podcast listeners who gave a response

Most Listen to Podcasts While Doing Chores Around the House and/or While In a Vehicle

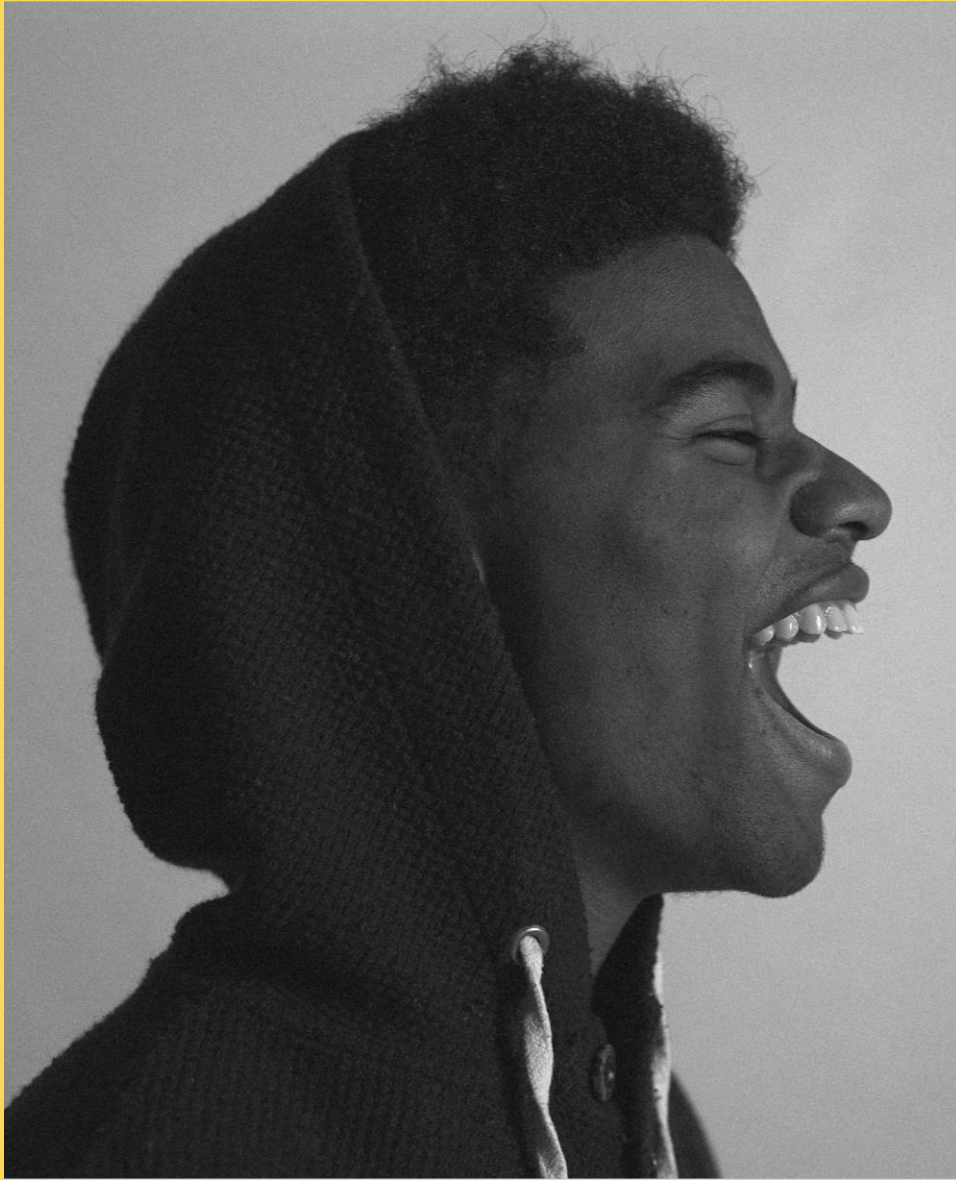
"In which of the following situations do you listen to podcasts?"



The Podcasting Experience Has Many Technical Issues

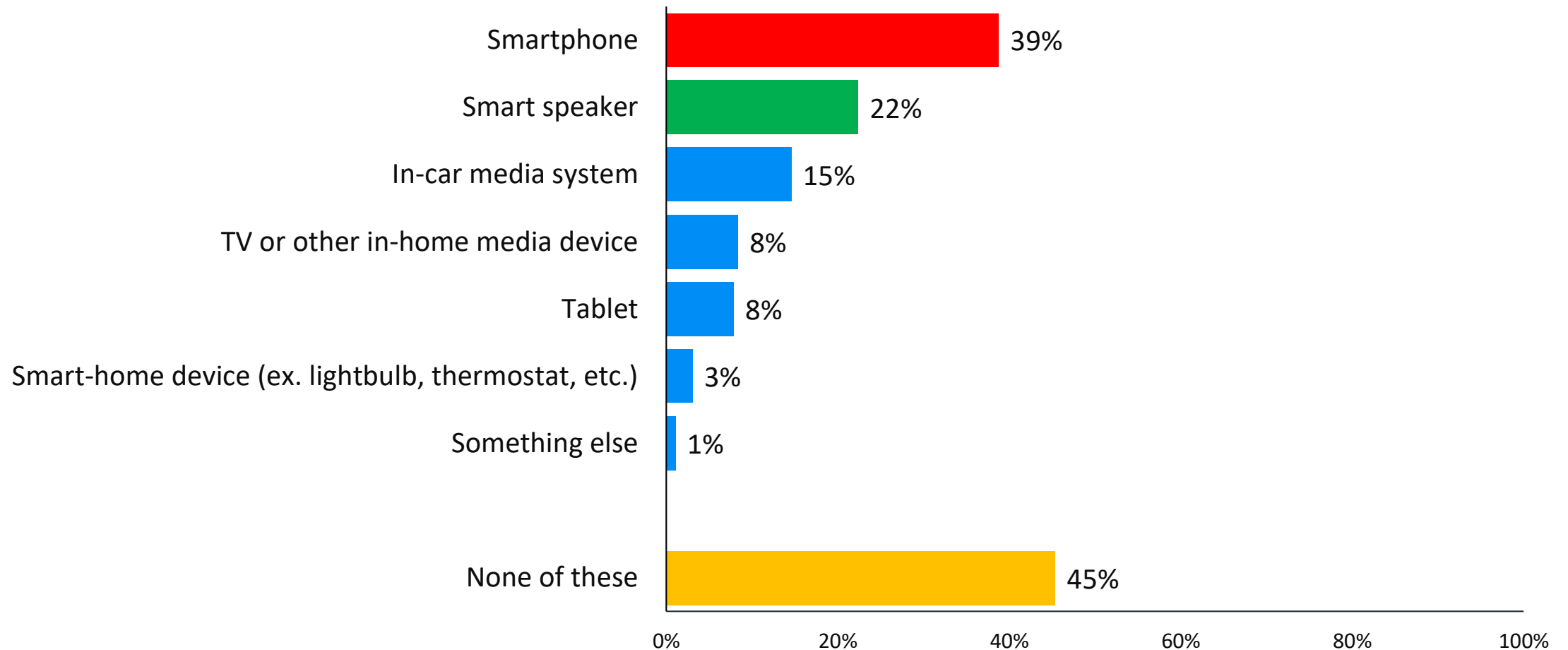


Among those who never listen to podcasts, % mentioning each as a reason they don't listen



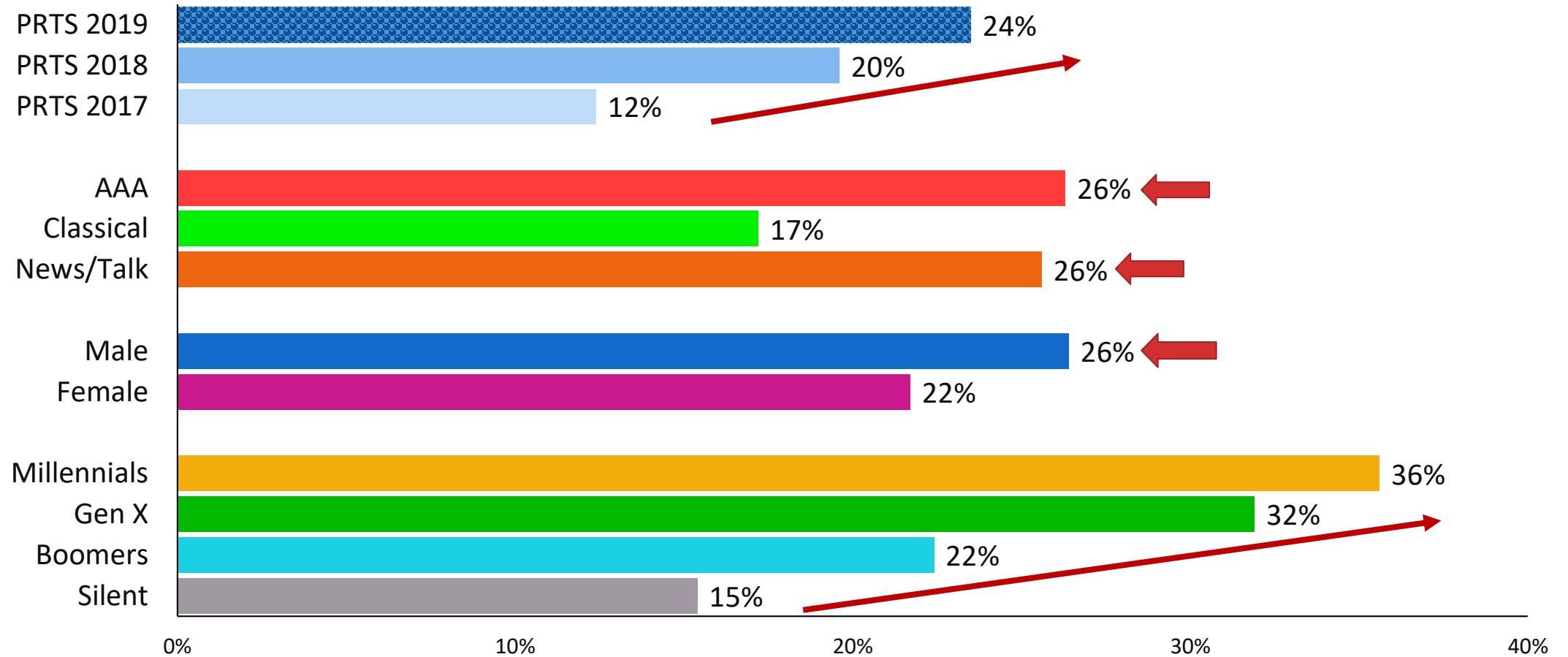
Smart Speakers & Voice

More Than Half Have Used the Built-In Voice Command Features on Any Device; Four in Ten Use Voice Commands on a Smartphone



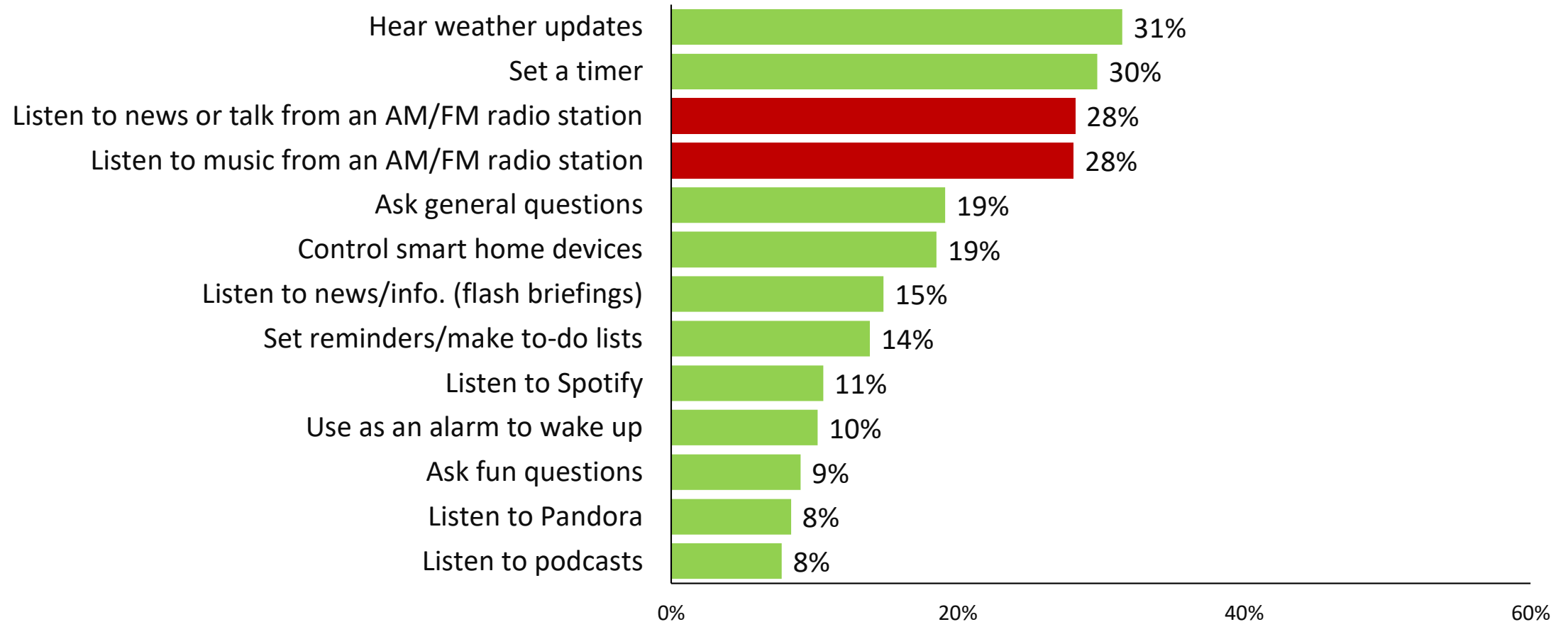
Among all respondents (multiple responses accepted)

Smart Speaker Ownership Continues to Rise Especially Among Progressively Younger Generations



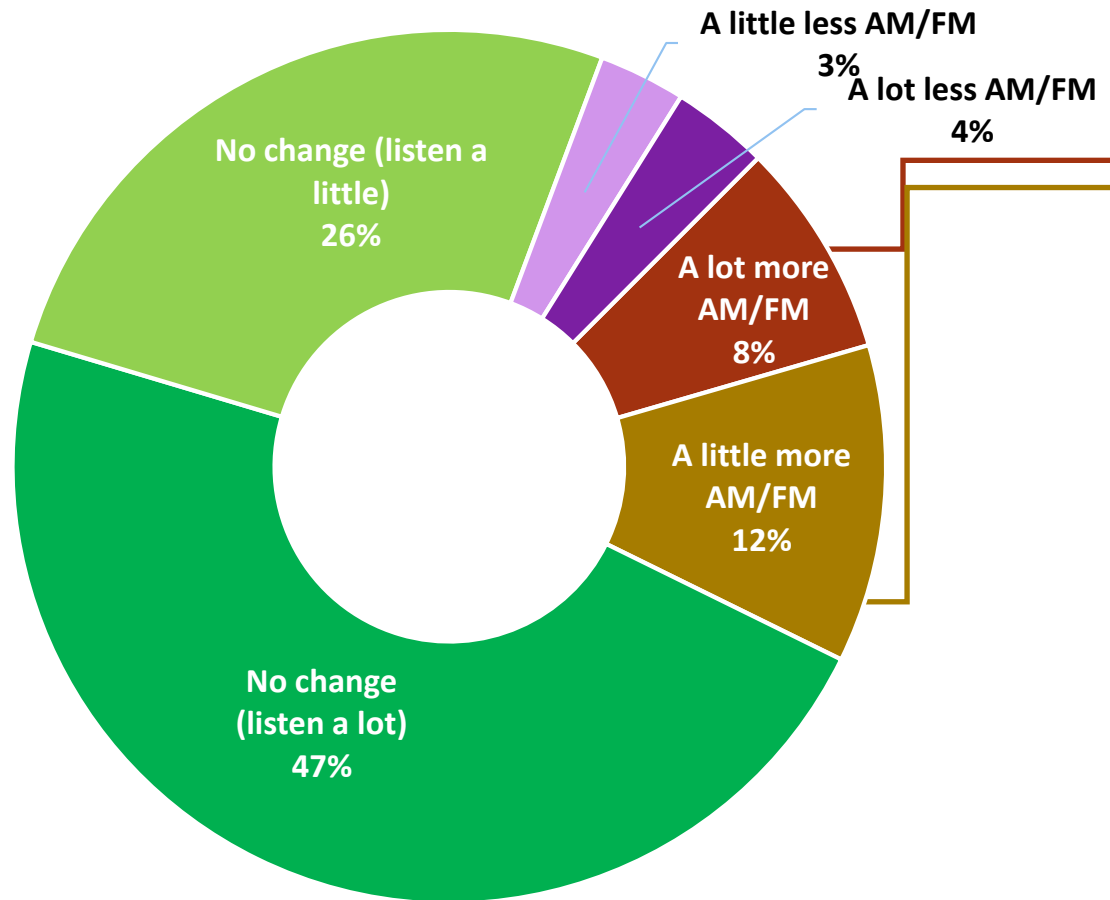
% who own a smart speaker (Amazon Alexa, Google Home, etc.)

Weather Updates & Setting a Timer Are the Top Uses For Smart Speakers, But News/Talk & Music on AM/FM Radio Are Next

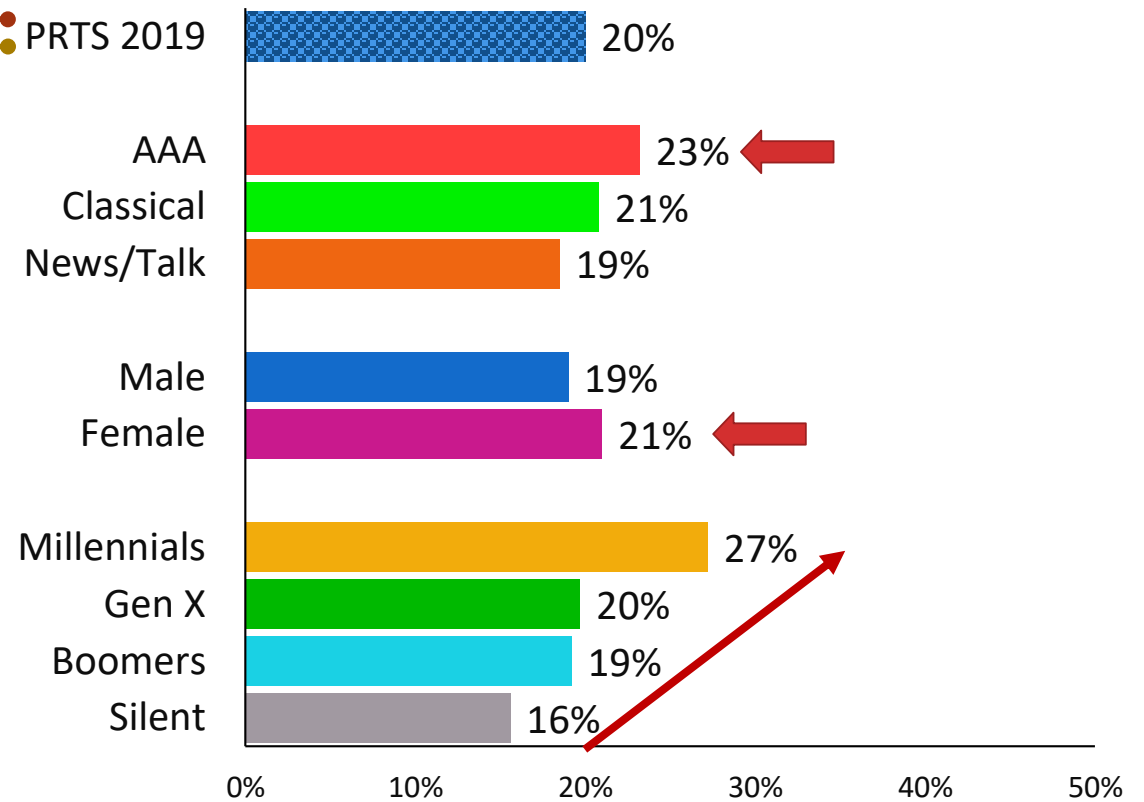


% of smart speaker owners who “frequently” use their device(s)
in each way (most mentioned uses; 8% or more)

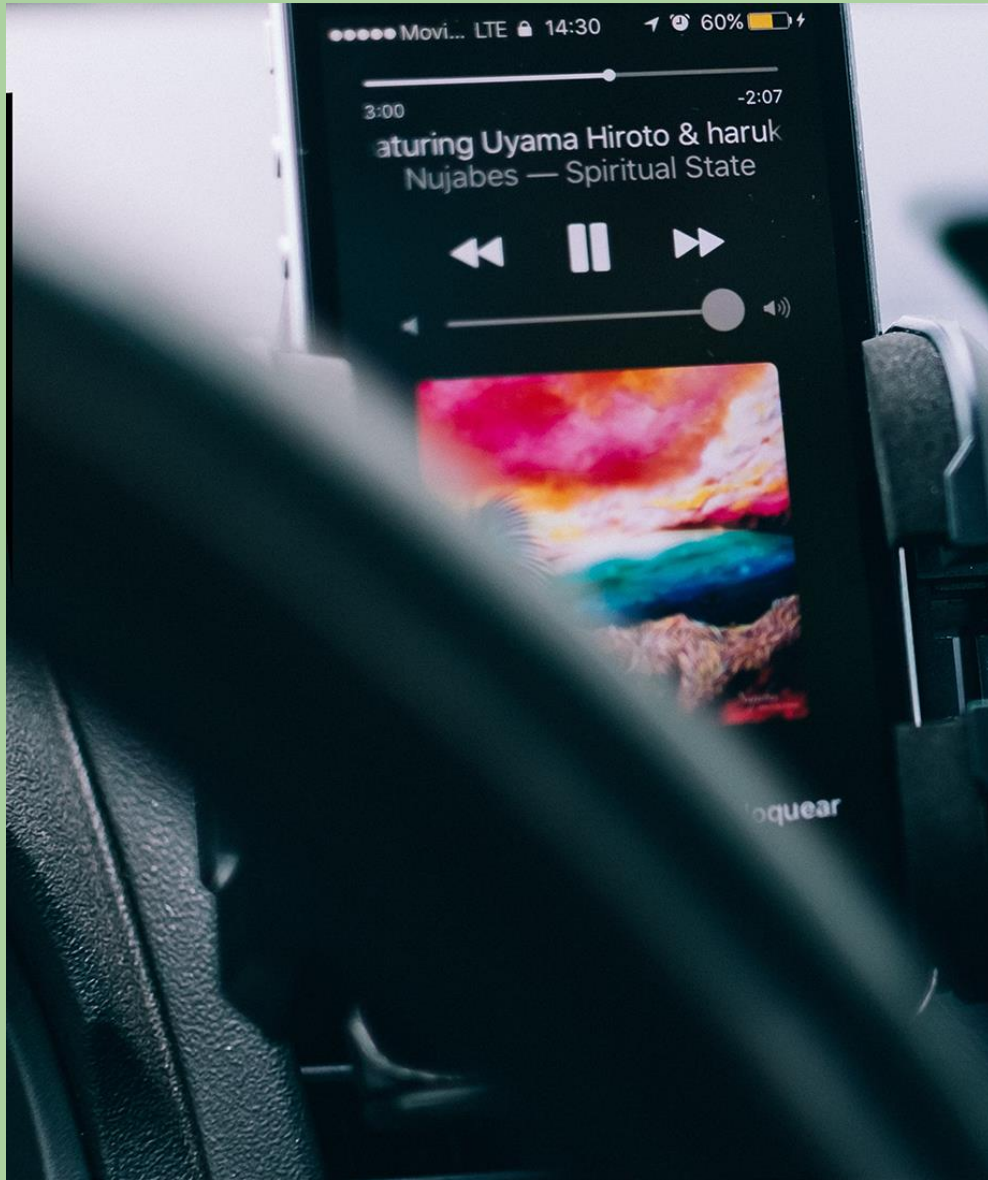
Millennials, Females and AAA Fans Are Most Apt to Listen to More AM/FM Radio Since Getting a Smart Speaker



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



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

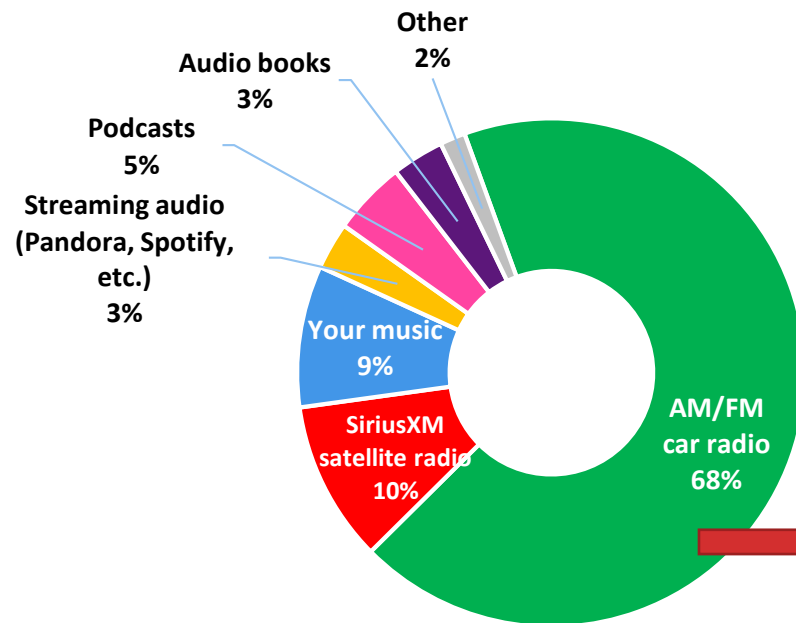


In-Car Audio

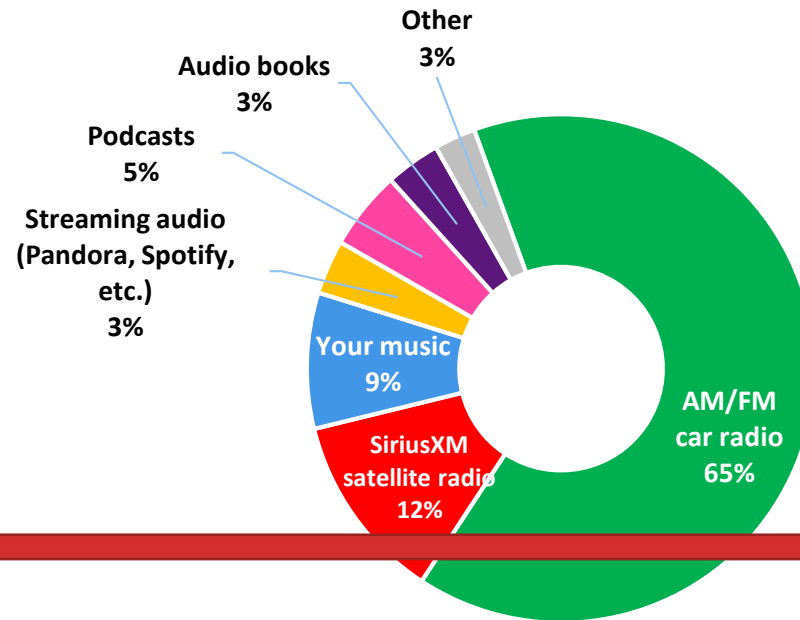
In-Car Audio Usage

Total

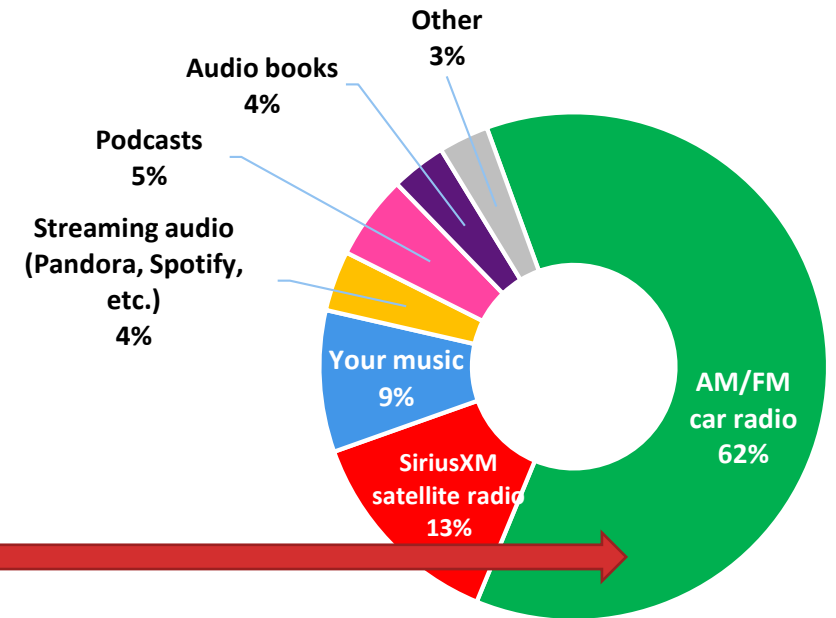
PRTS 2017



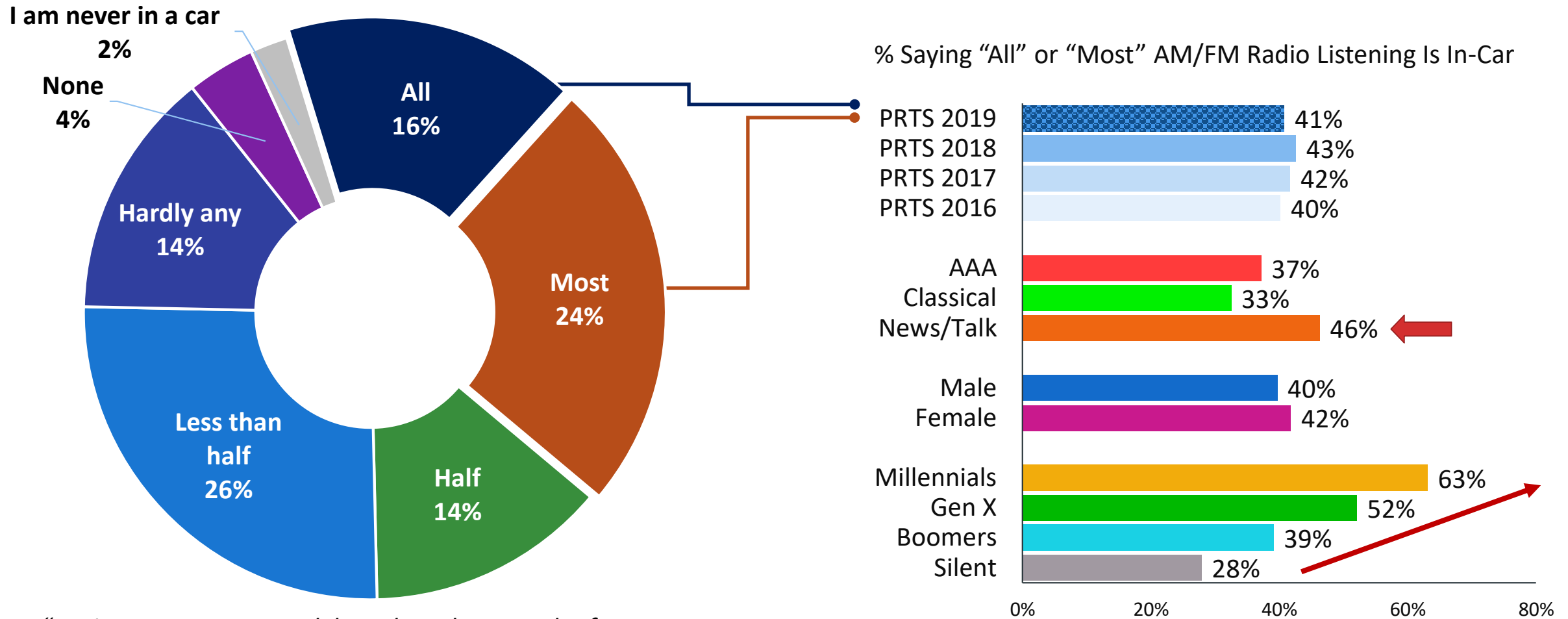
PRTS 2018



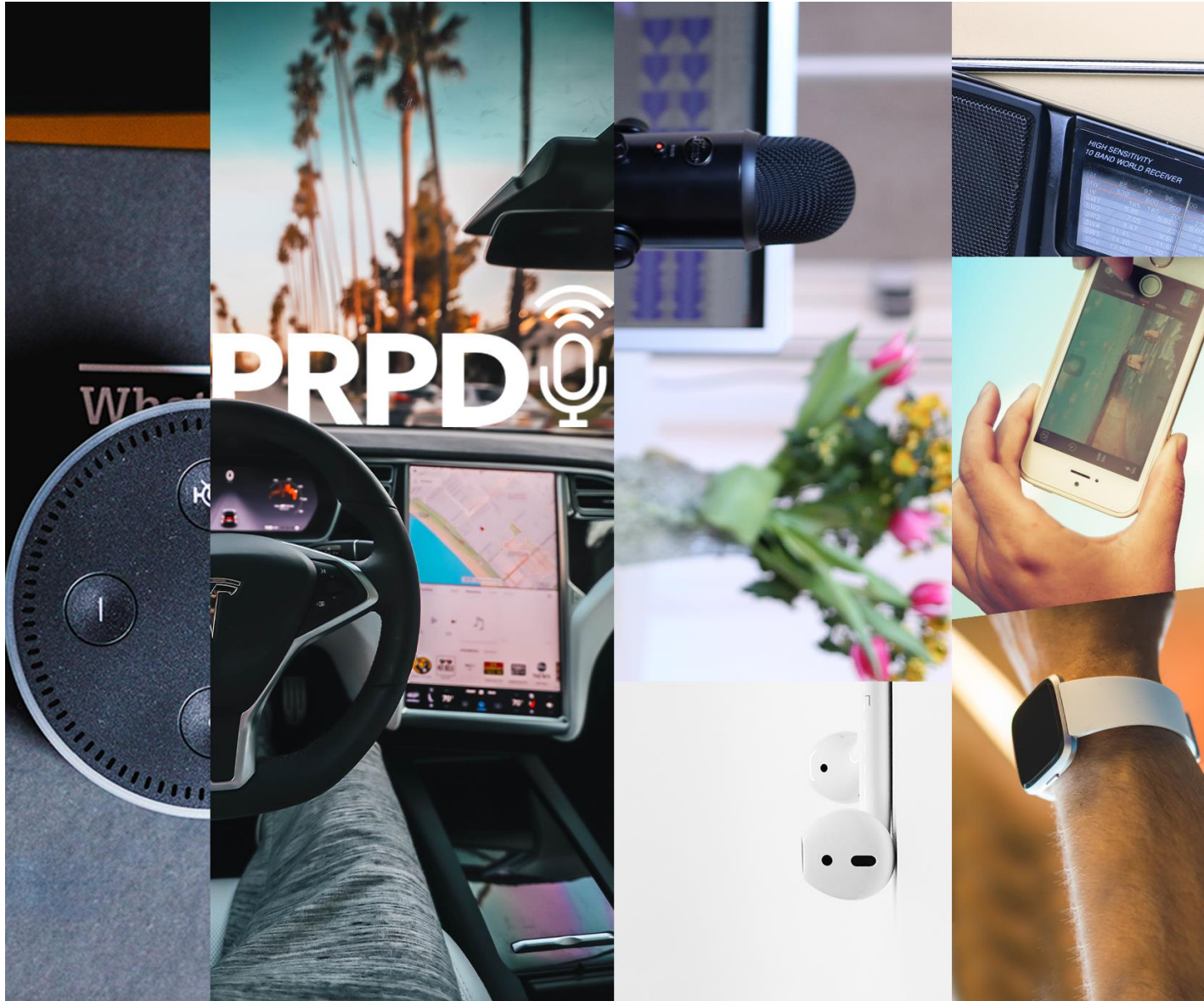
PRTS 2019



Four in Ten Say All or Most of Their AM/FM Radio Listening Is In-Car, Especially Millennials



"During an average weekday, about how much of your total AM/FM radio listening time takes place in a car?"



Public Radio TECHSURVEY 2019

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