

 **TECHSURVEY**
2020 PUBLIC RADIO
JACOBS MEDIA

Public Radio in a Global Pandemic

The Findings

- Radio listening is down sharply as is the presence of radios in homes
- Digital consumption of public radio hits an all-time high
- The vital signs – core values, NPS, & membership – are solid
- What’s driving these changes? The pandemic & its tentacles
- The country is being “rocked” & we’re seeing the seismic effects
- In-car listening way off
- Conversely, video streaming is exploding (audio streaming “up,” too)
- Mobile apps & smart speakers grow, representing opportunity
- Podcasts are growing – but not just in public radio circles
- Politics continues to be a driver heading into the election

Methodology

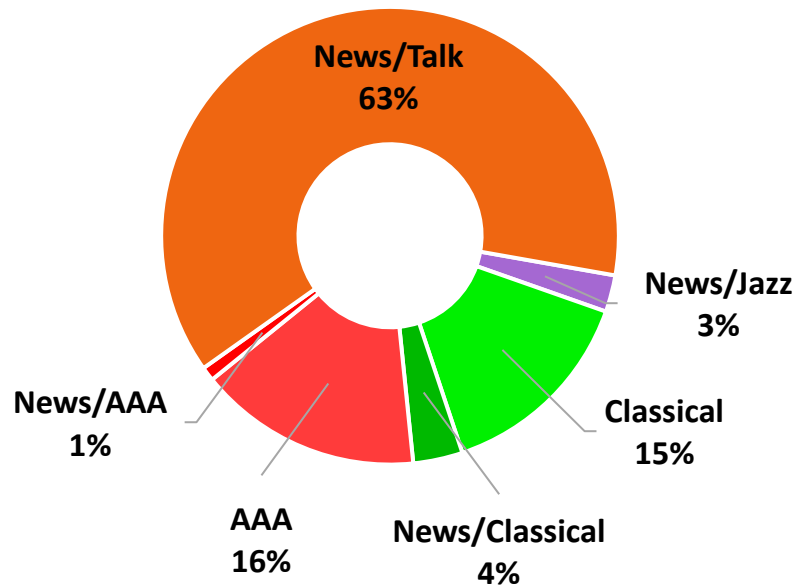
- 53 U.S. public radio stations
- N = 19,015
- Interview dates: June 23-July 19, 2020
- Most respondents are members of station databases. Some responses were gathered via station websites and/or social media pages.
- All responses were collected online and weighted using Nielsen 2019 market population 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.



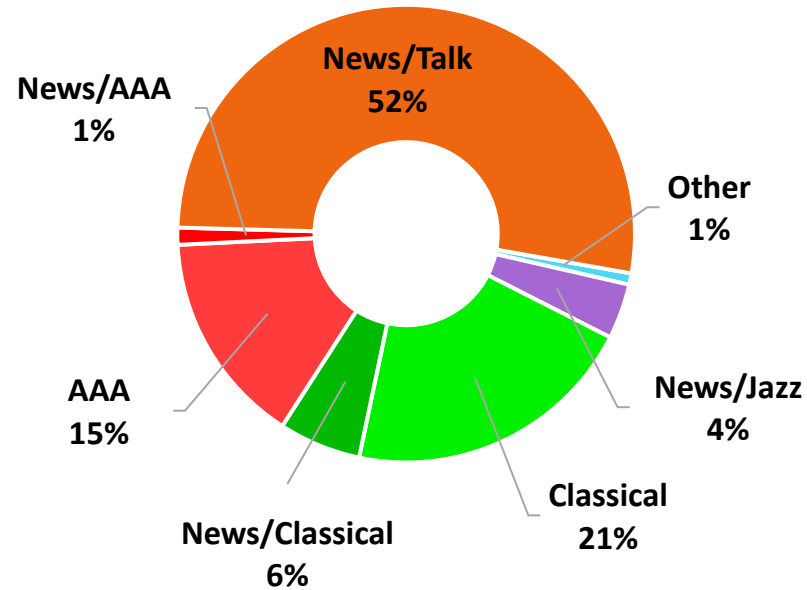
The Sample

Format Composition

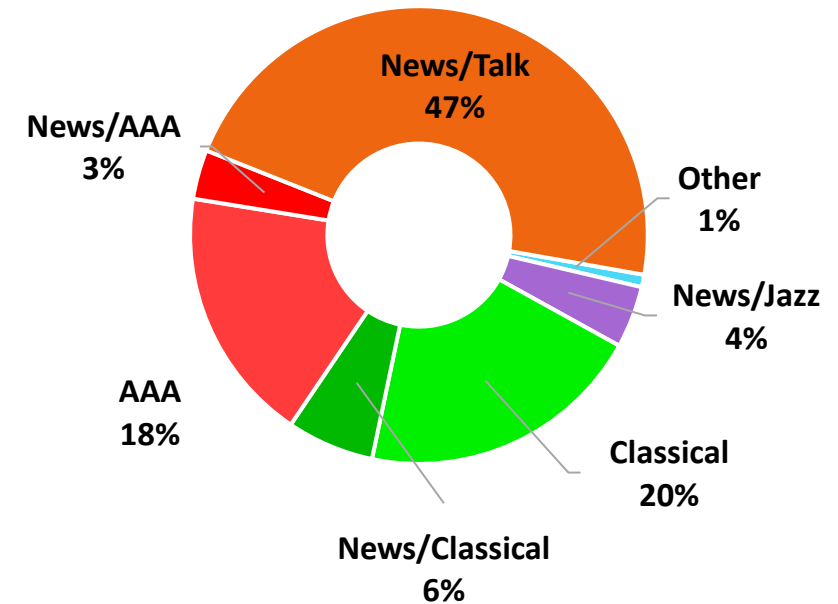
PRTS 2018



PRTS 2019

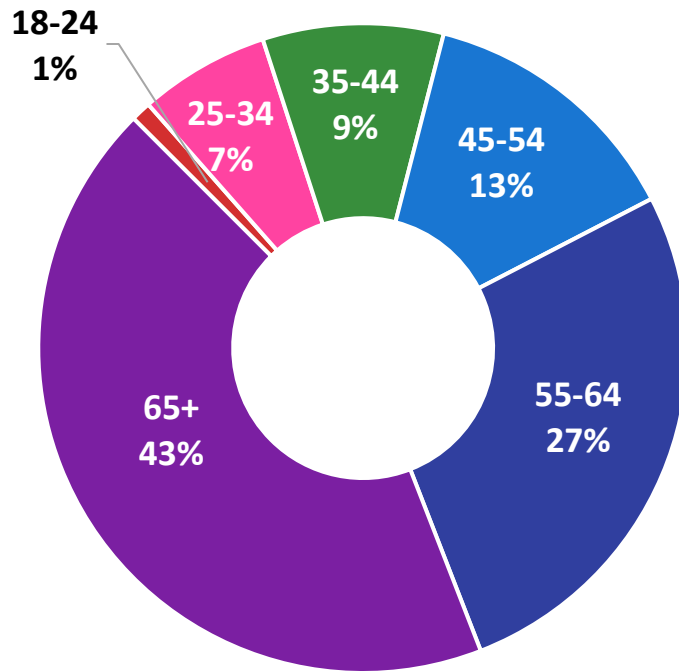


PRTS 2020



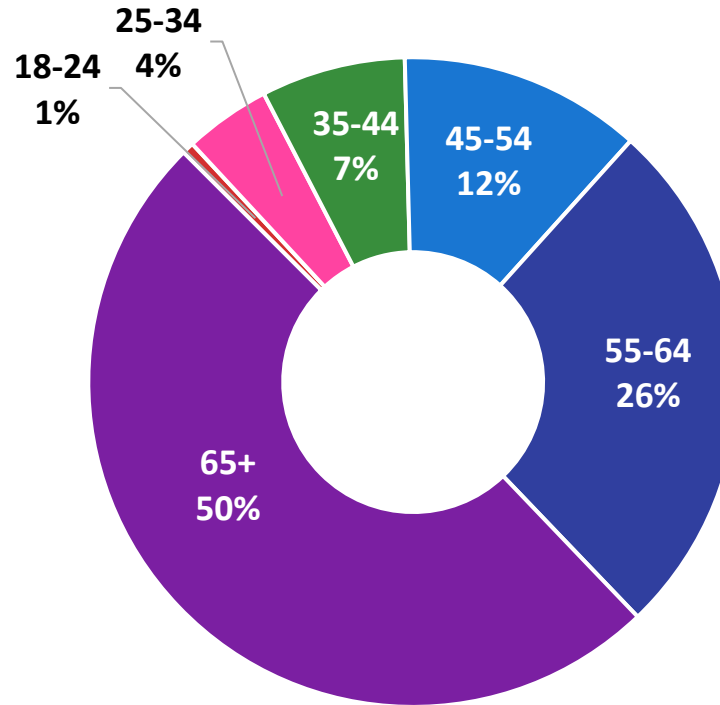
Age

PRTS 2018



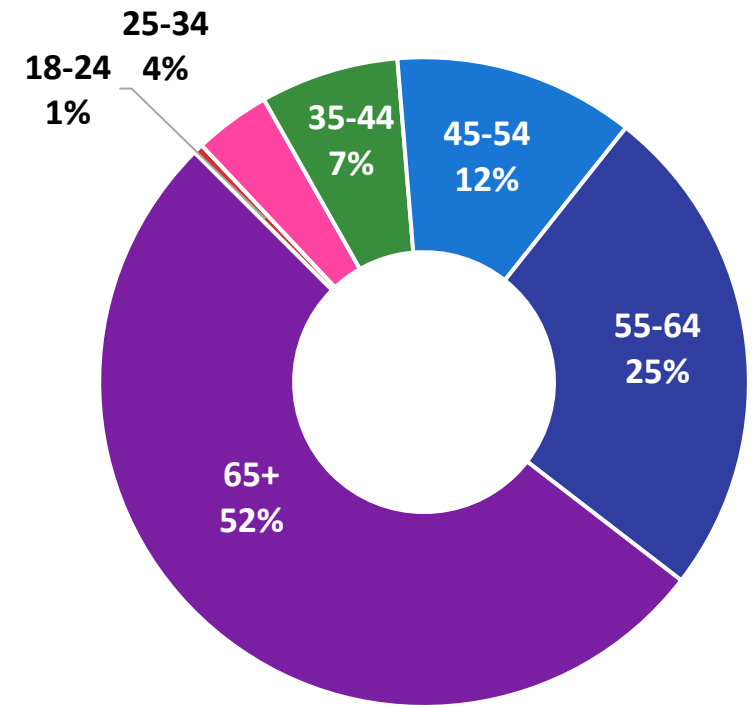
Average age: 59.7

PRTS 2019



Average age: 61.8

PRTS 2020

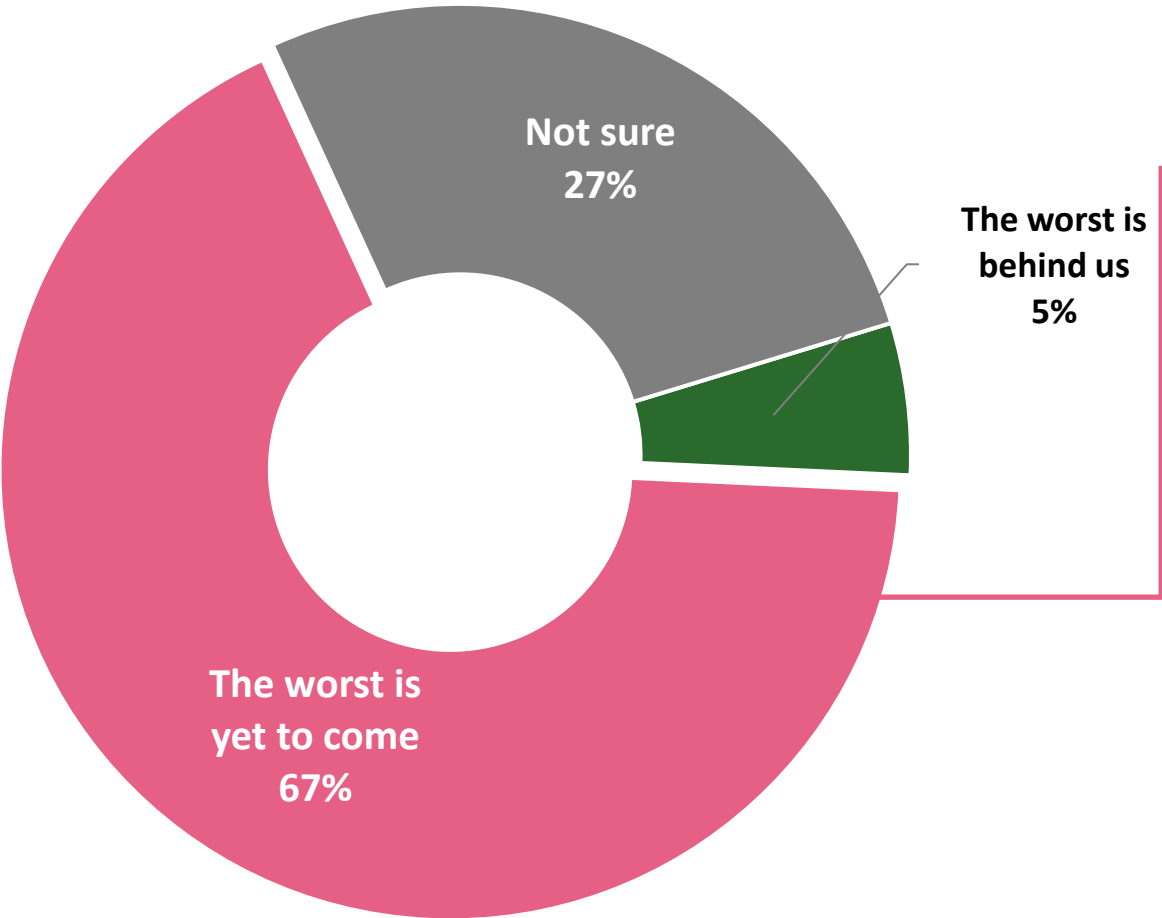


Average age: 62.5

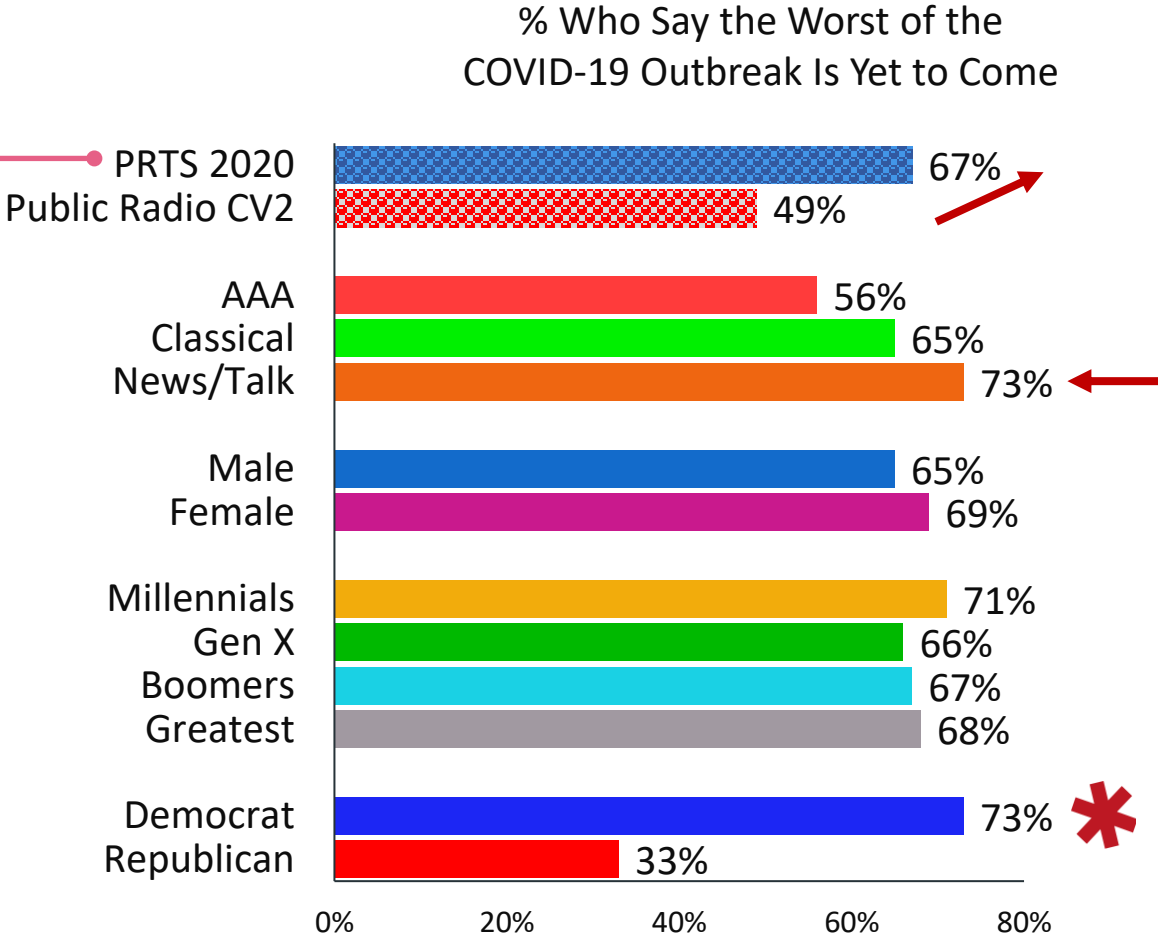


Inside COVID-19: The Public Radio Audience's Mindset

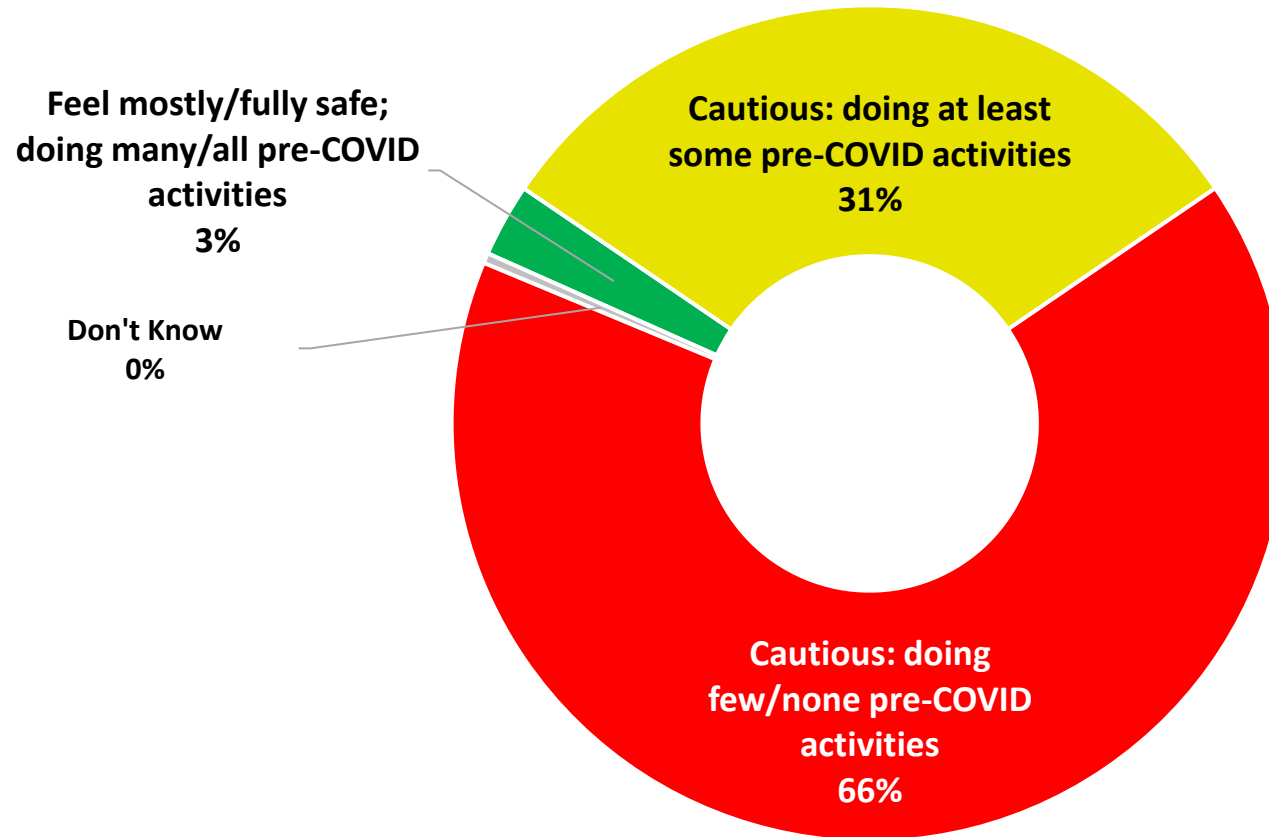
Two in Three Public Radio Listeners Are Pessimistic About Where the COVID-19 Outbreak Is Headed; a Significant Increase Since May



“Which of the following best describes how you feel about the COVID-19 outbreak?”



Two in Three Remain Cautious and Are Doing Few/None of Their Pre-COVID-19 Activities



"Now that most states have reopened or removed at least some COVID-19 restrictions, which of the following best describes you?"

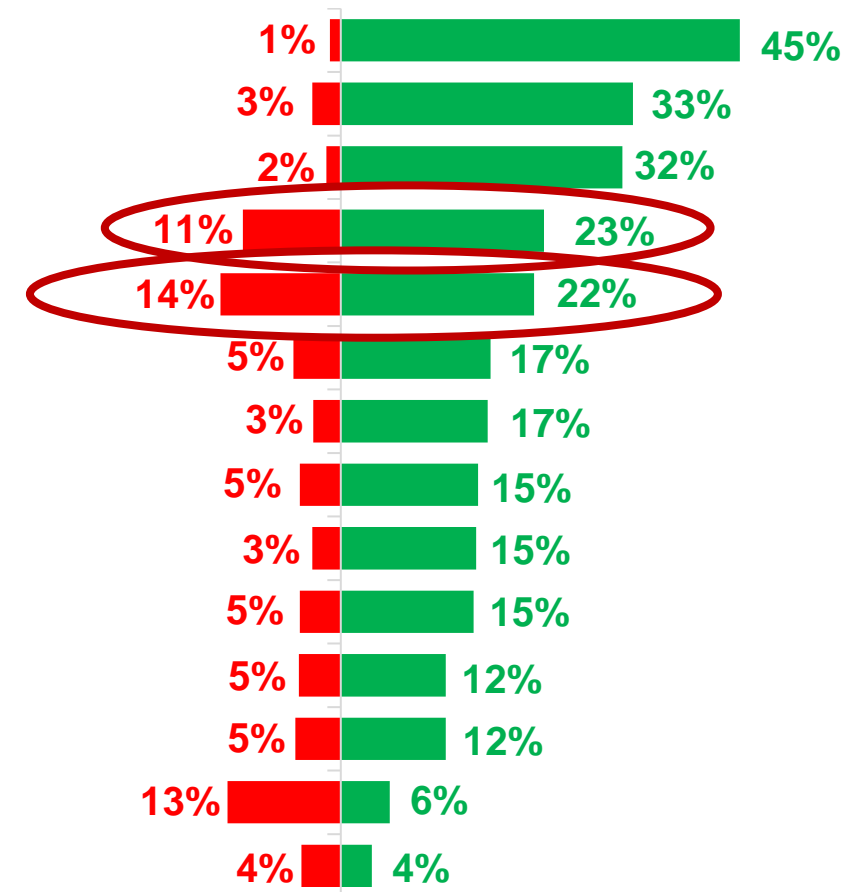


Changes in Media Usage Since COVID-19

In May, Home Station Listening Was Solid; Streaming Video, Web Browsing and Newspapers Were All Strong

CV2
May

Streaming video services (Netflix, Hulu, etc.)
General internet browsing
National newspaper (physical paper/online/app)
NPR/Public Radio
THE STATION THAT SENT YOU THIS SURVEY
Social media
Music streaming services (Spotify, Pandora, etc.)
Podcasts
Local newspaper (physical paper/online/app)
Cable TV news channels (CNN, Fox News, etc.)
Local TV stations
Network TV (ABC, NBC, etc.)
Other AM/FM radio stations in your city/town
SiriusXM satellite radio



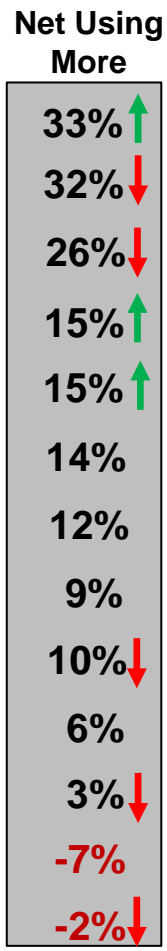
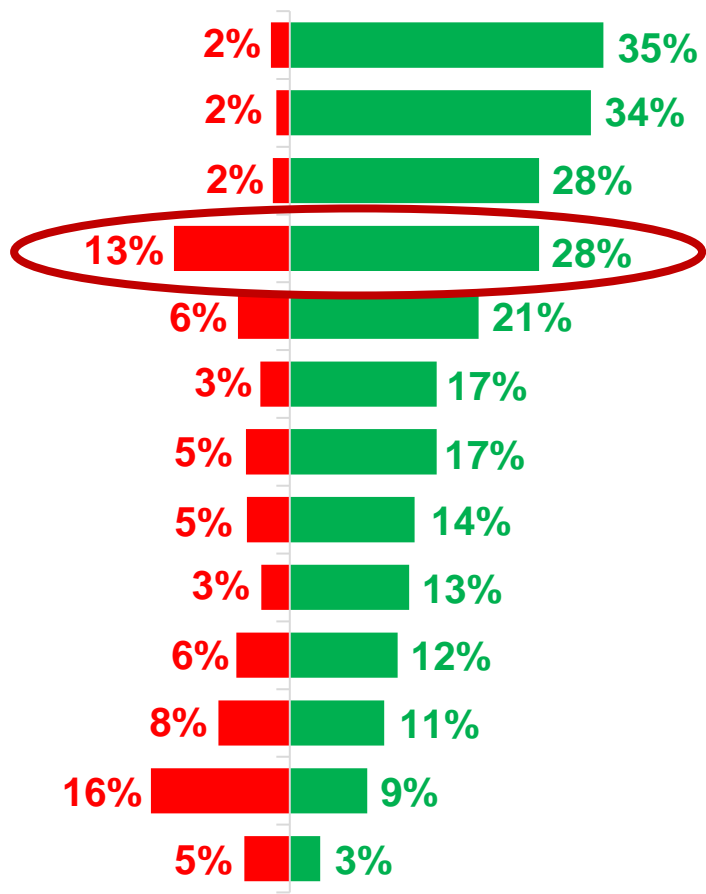
Net Using More

44%
30%
30%
12%
8%
12%
14%
10%
12%
10%
7%
7%
-7%
0%

← % Using Less Now % Using More Now →

Since COVID-19, Home Station Listening Is Solid; Web Browsing, Streaming Video, and Newspapers Are All Strong

General internet browsing
Streaming video services (Netflix, Hulu, etc.)
National newspaper (physical paper/online/app)
THE STATION THAT SENT YOU THIS SURVEY
Social media
Local newspaper (physical paper/online/app)
Cable TV news channels (CNN, Fox News, etc.)
Podcasts
Music streaming services (Spotify, Pandora, etc.)
Local TV stations
Network TV (ABC, NBC, etc.)
Other AM/FM radio stations in your city/town
SiriusXM satellite radio

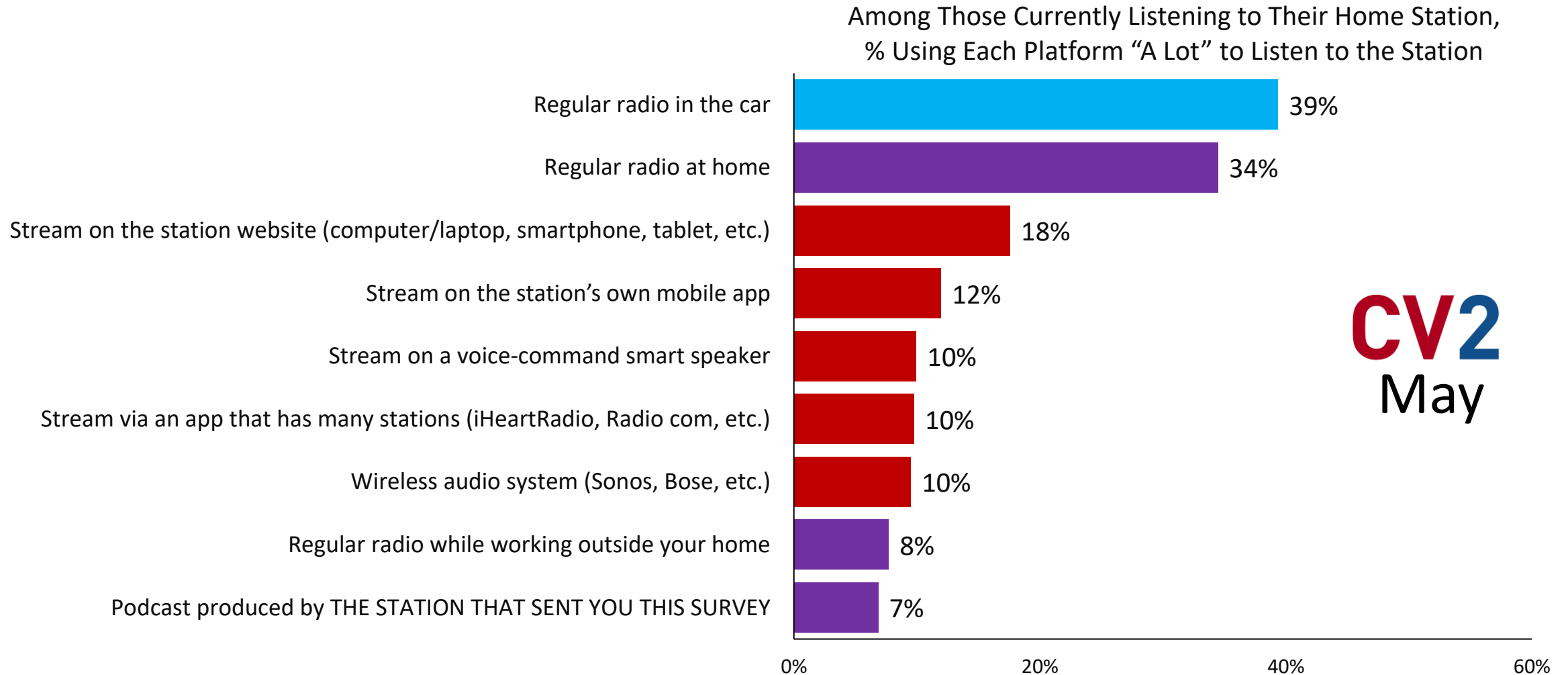


← % Using Less Now % Using More Now →

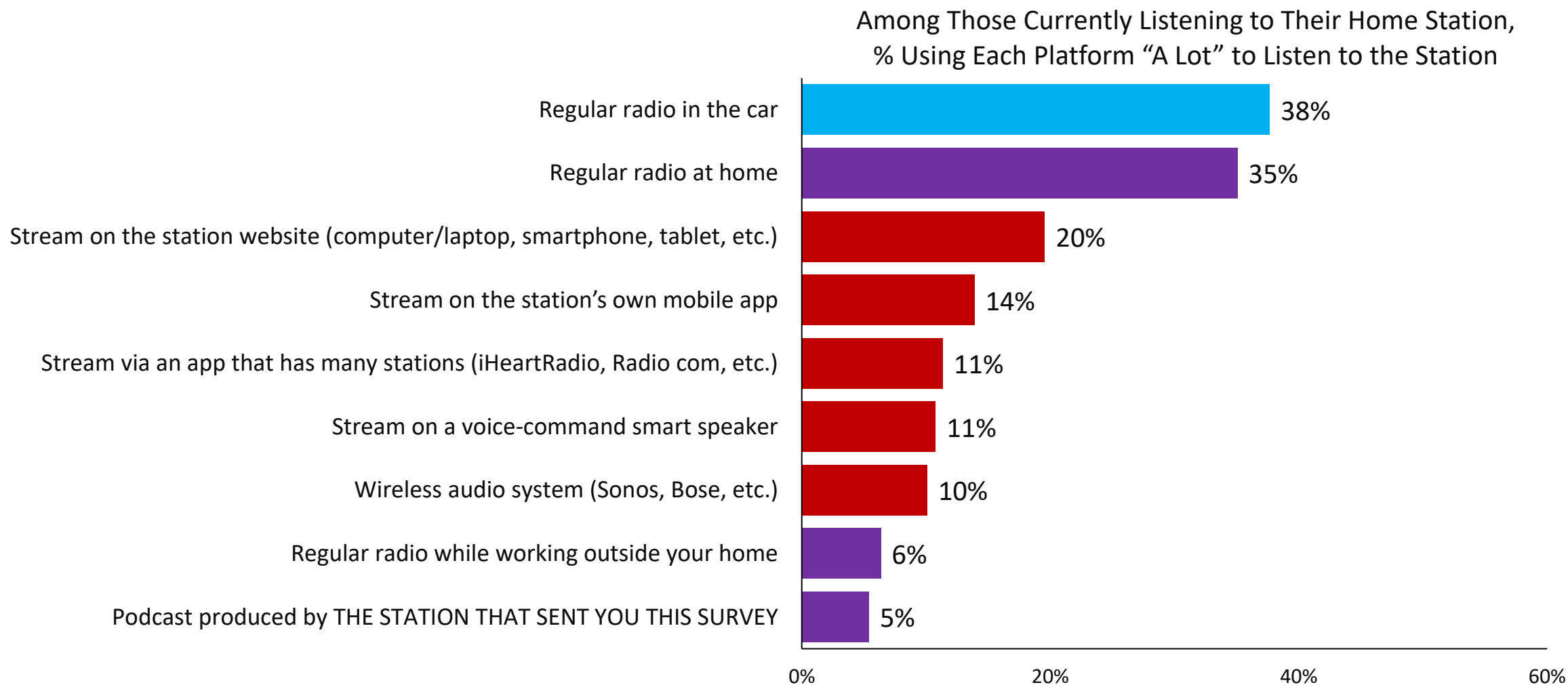


Public Radio Listening & the Coronavirus

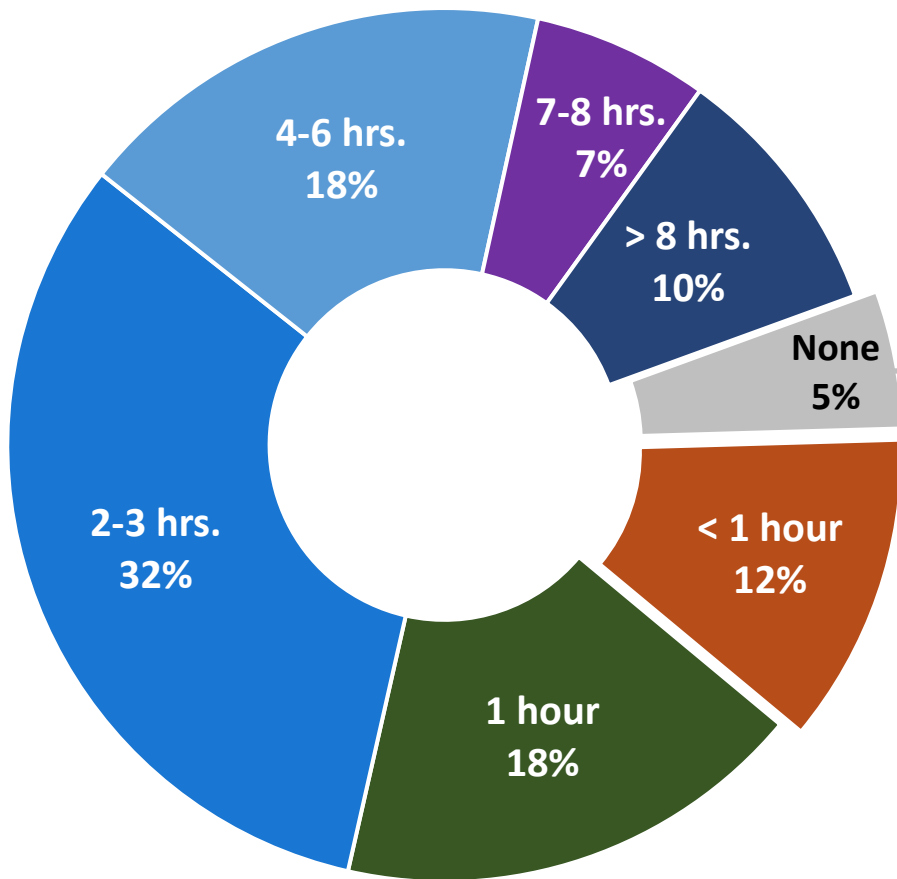
In May, In-Car Listening Was Ahead, While Streaming on Various Devices Looked Solid



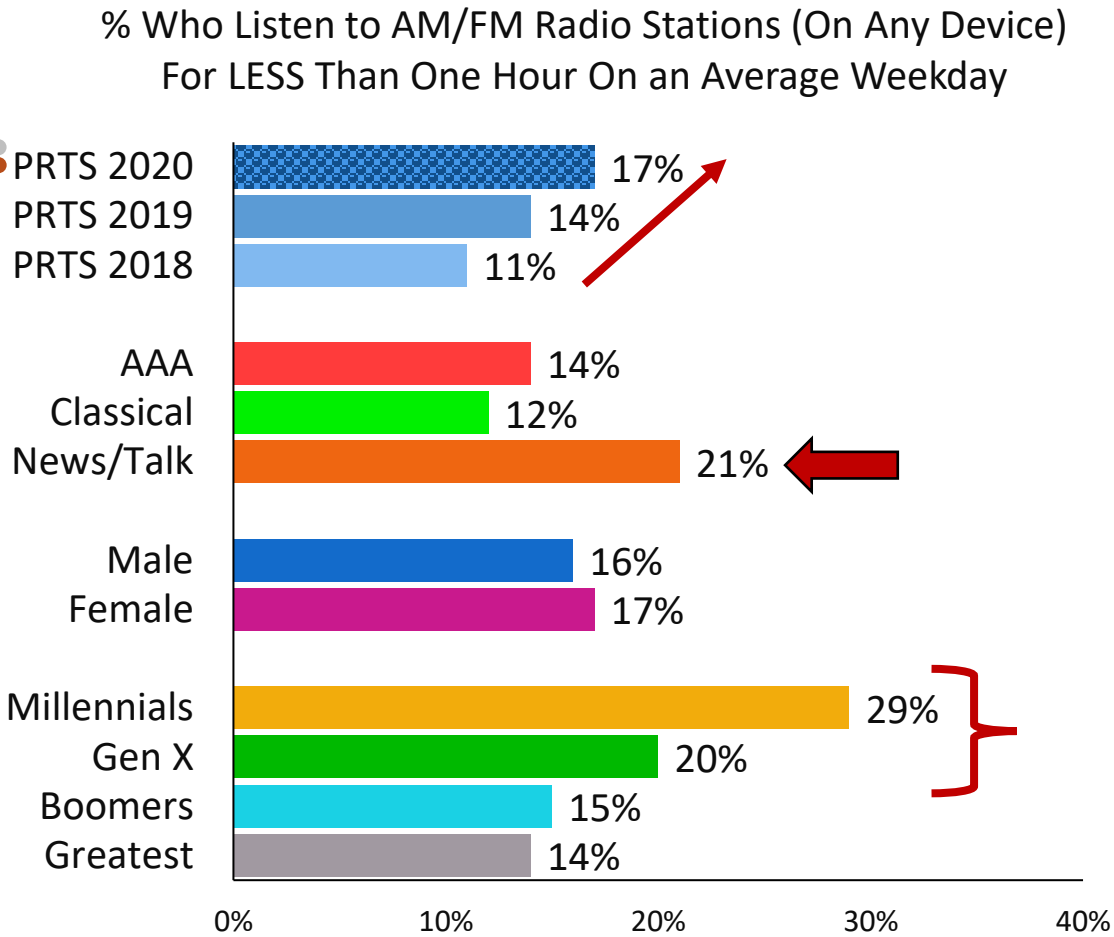
Usage Patterns Are Largely Unchanged From May – In-Car Listening Continues to Lag, While Streaming Remains Important



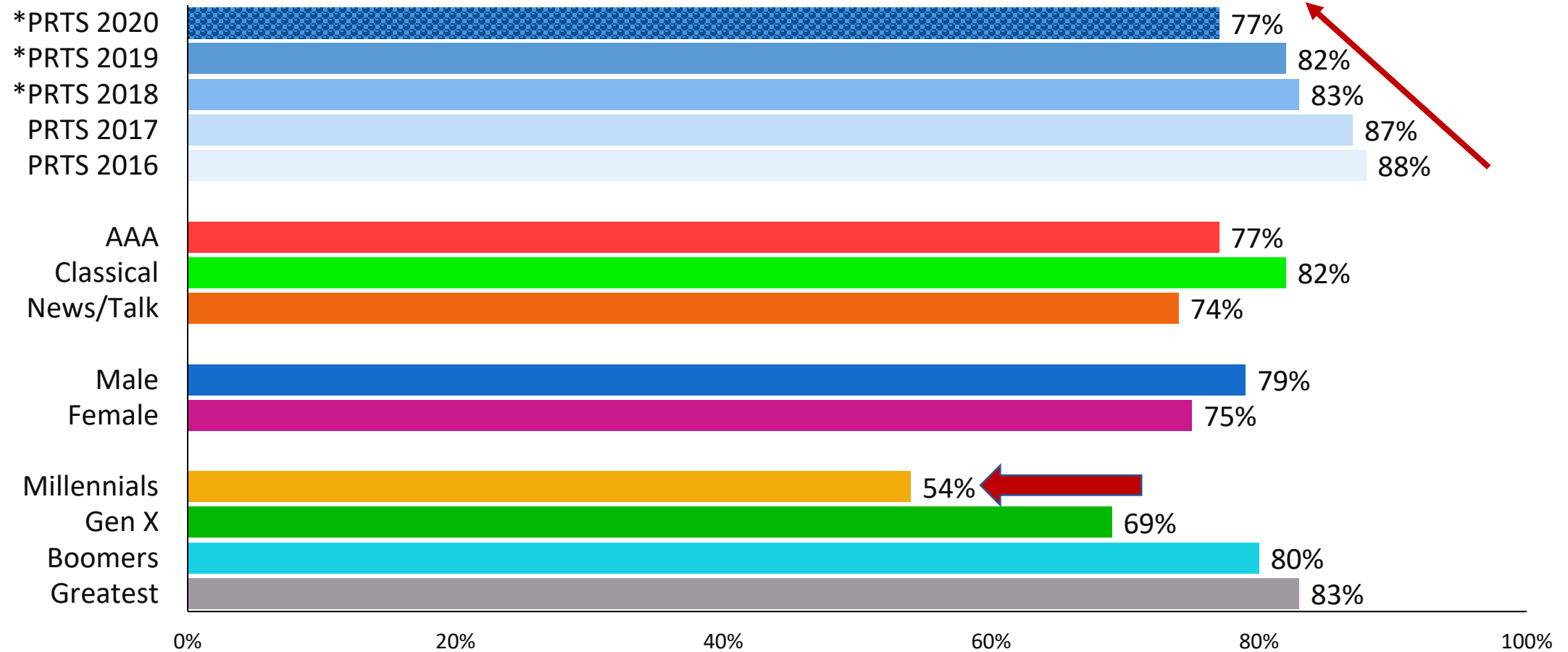
Listening to AM/FM Radio One Hour a Day or More Has Slipped



“How many hours on an average WEEKDAY (Monday-Friday) do you use/listen to any local AM/FM radio stations (using a regular radio OR audio stream on any device)?”



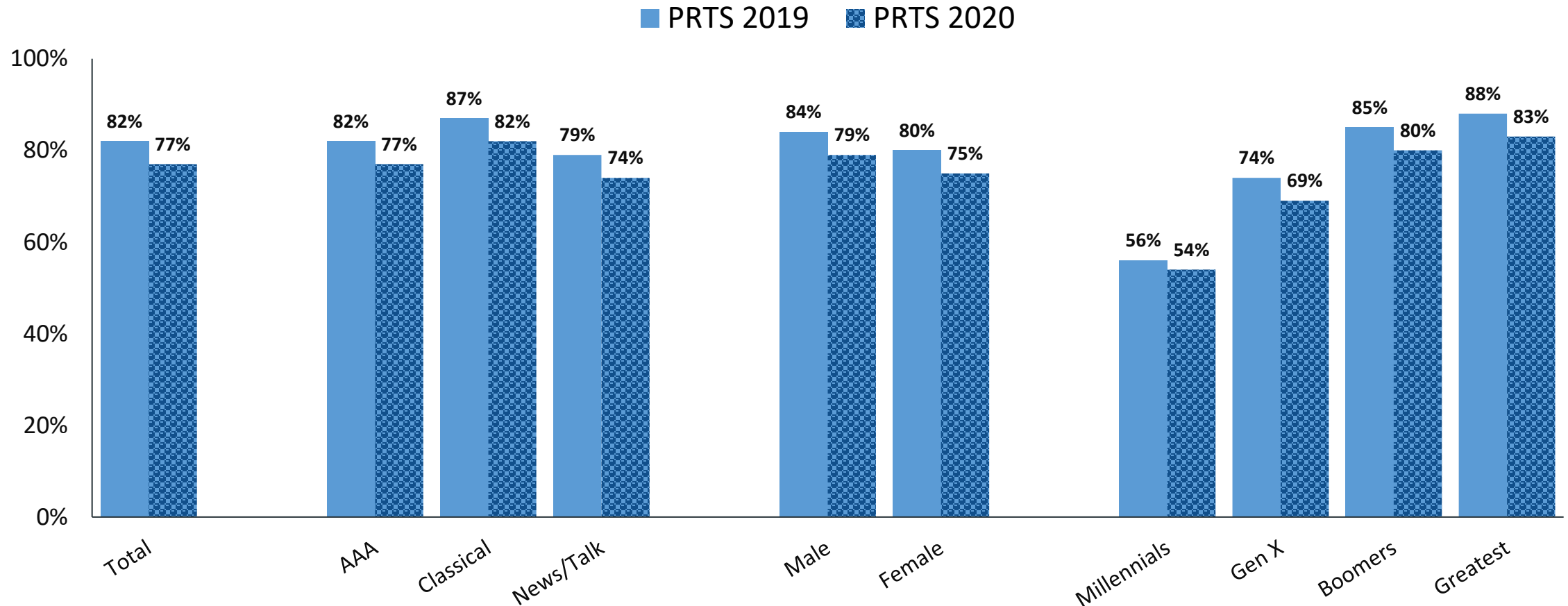
Fewer Than Eight in Ten Have a Regular Radio Where They Live, While Just Over Half of Millennials Do



% with a regular radio in working condition where they live that they use*

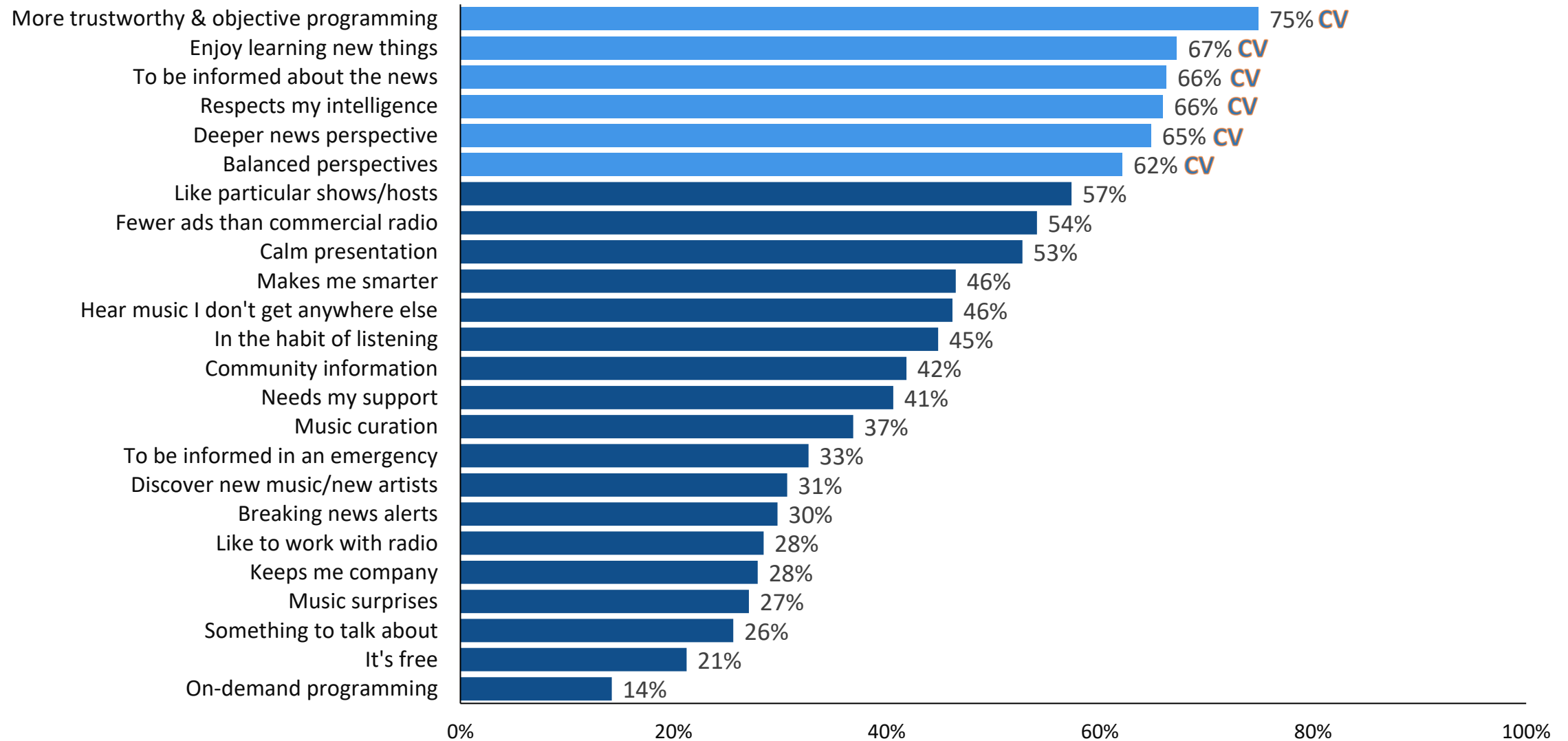
*added wording: "...that you use?"

During COVID There Has Been a Steep Decline In Regular Radio Usage at Home



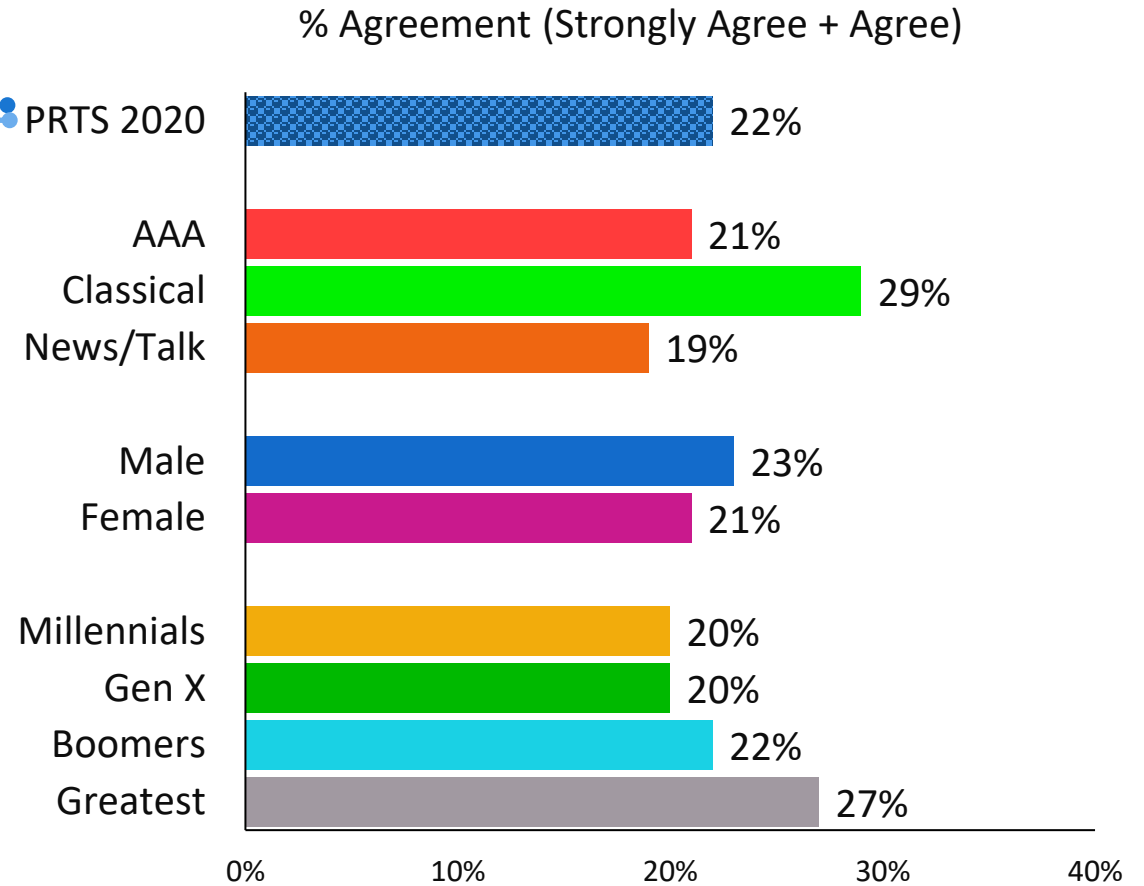
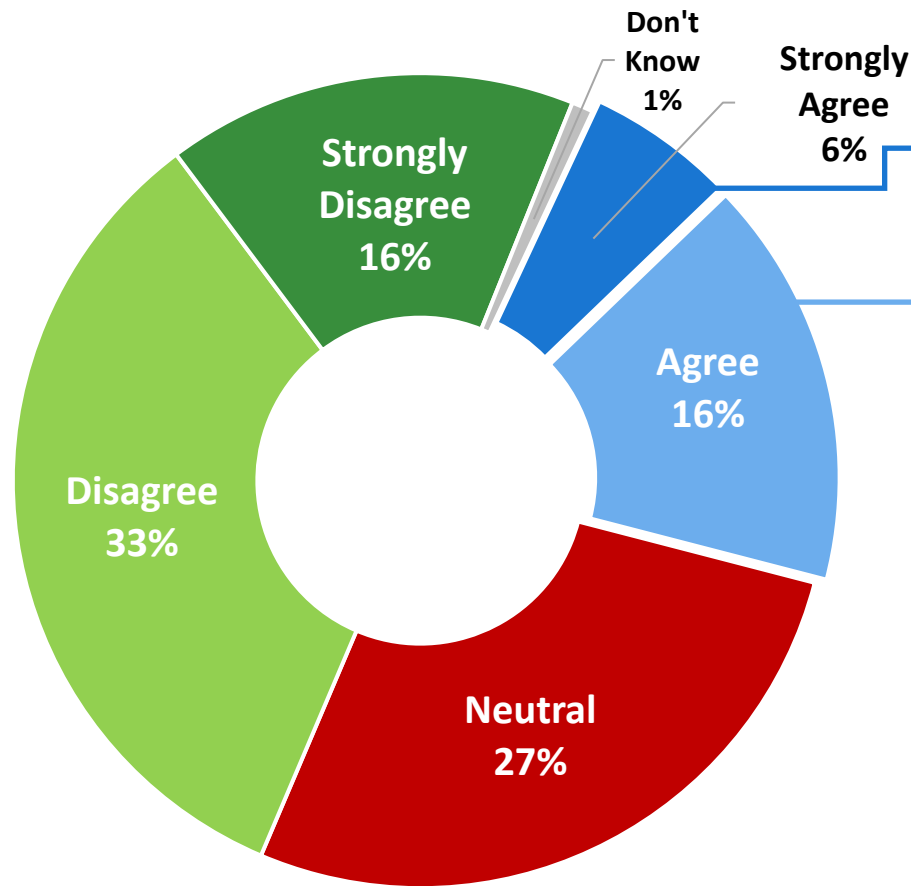
% with a regular radio in working condition where they live that they use

Main Reasons For Listening to Public Radio



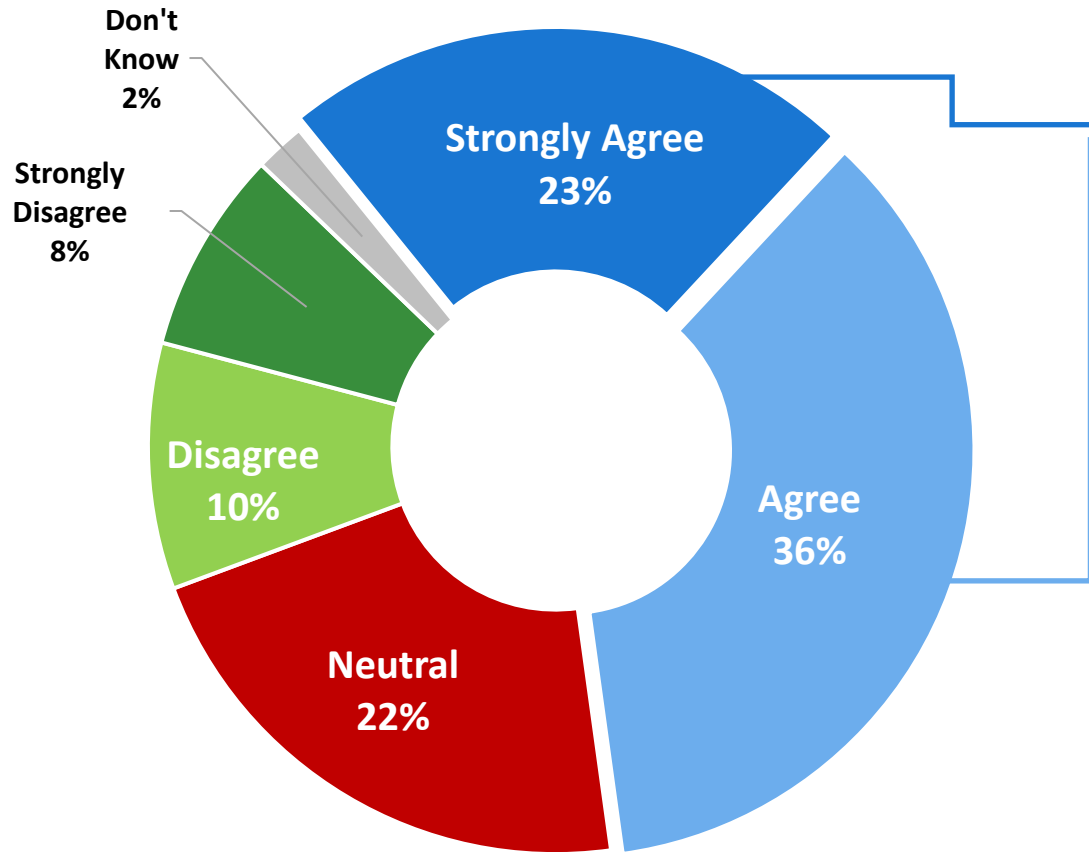
Among those who listen to AM/FM radio, % who say
this is a main reason they listen to public radio

Fewer Than One in Four Say They Are Tired of Hearing COVID-19 News Coverage

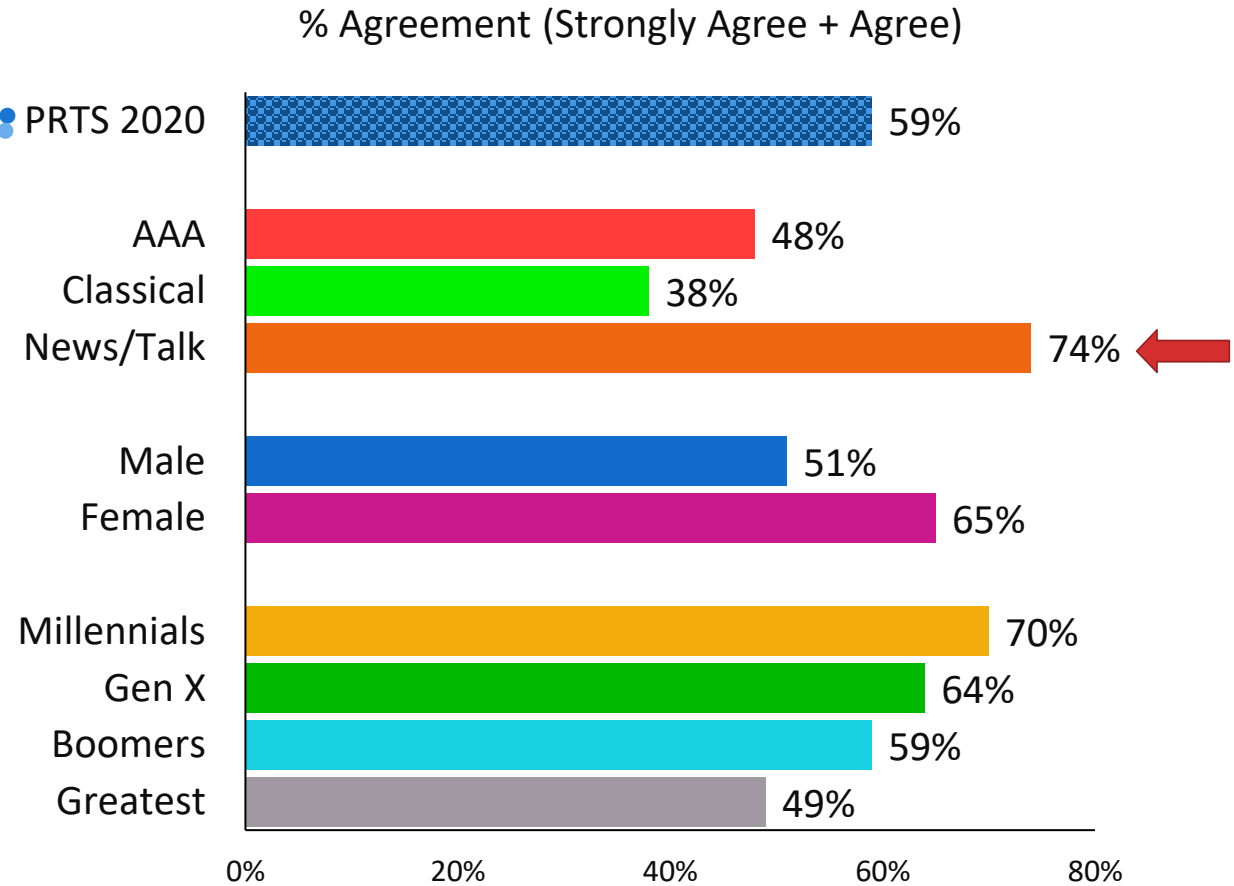


"I'm getting tired of hearing COVID-19 news coverage"

About Six in Ten Say They Listen to Public Radio For Coverage and Perspective on Race Relations



"I listen to public radio for coverage and perspective on race relations"

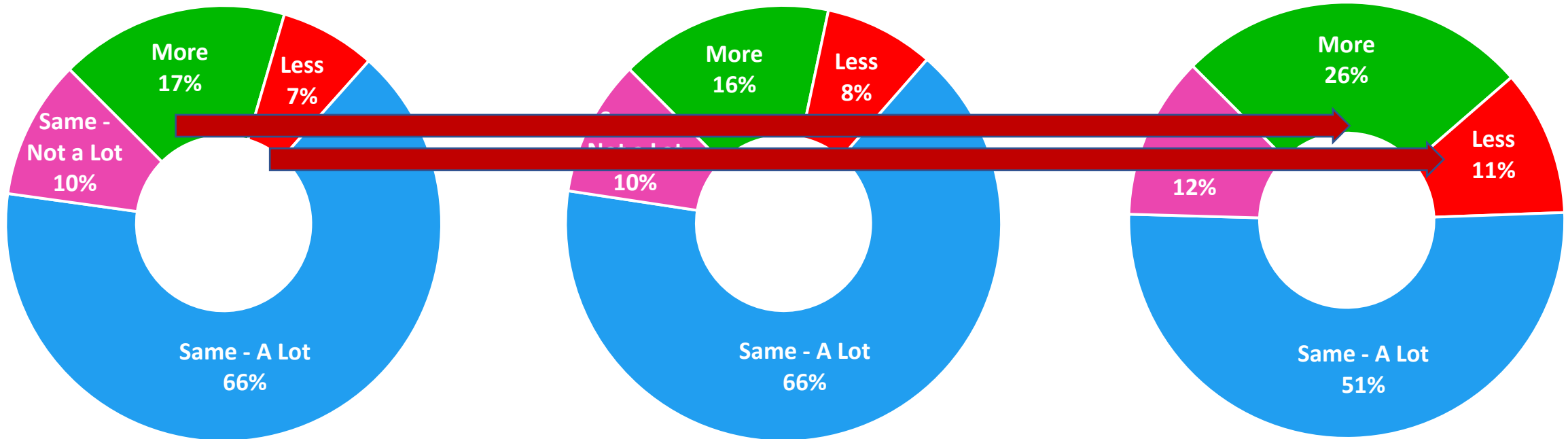


Public Radio Listening Momentum Has Strengthened – but Also Weakened – in the Current Political and Social Environment

PRTS 2018

PRTS 2019

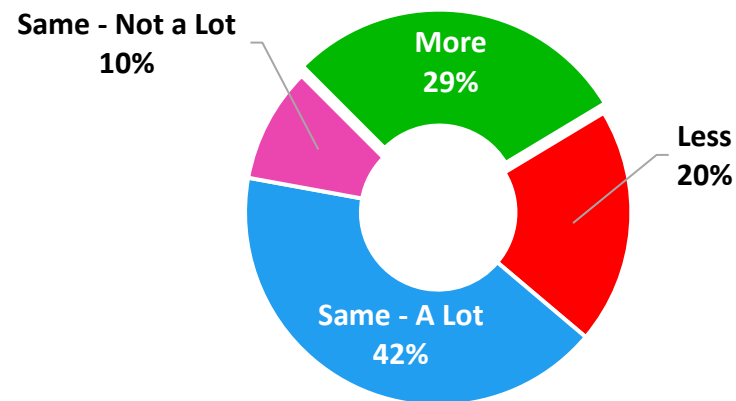
PRTS 2020



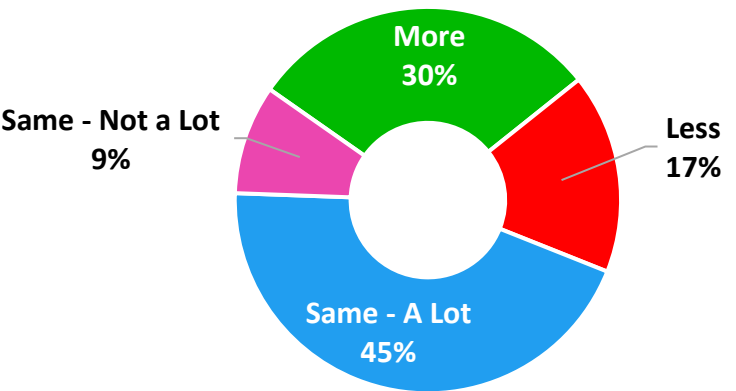
Among those who listen to AM/FM radio

Public Radio Listening Momentum Is Strong Across All Generations

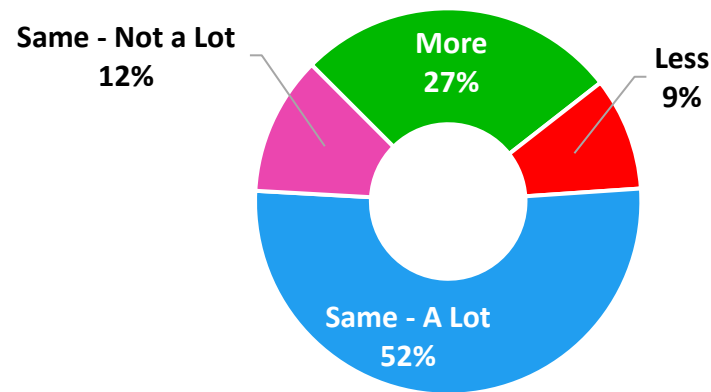
Millennials



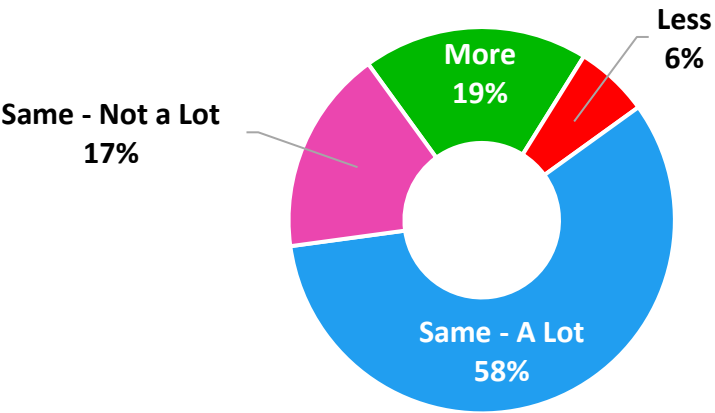
Gen X



Boomers

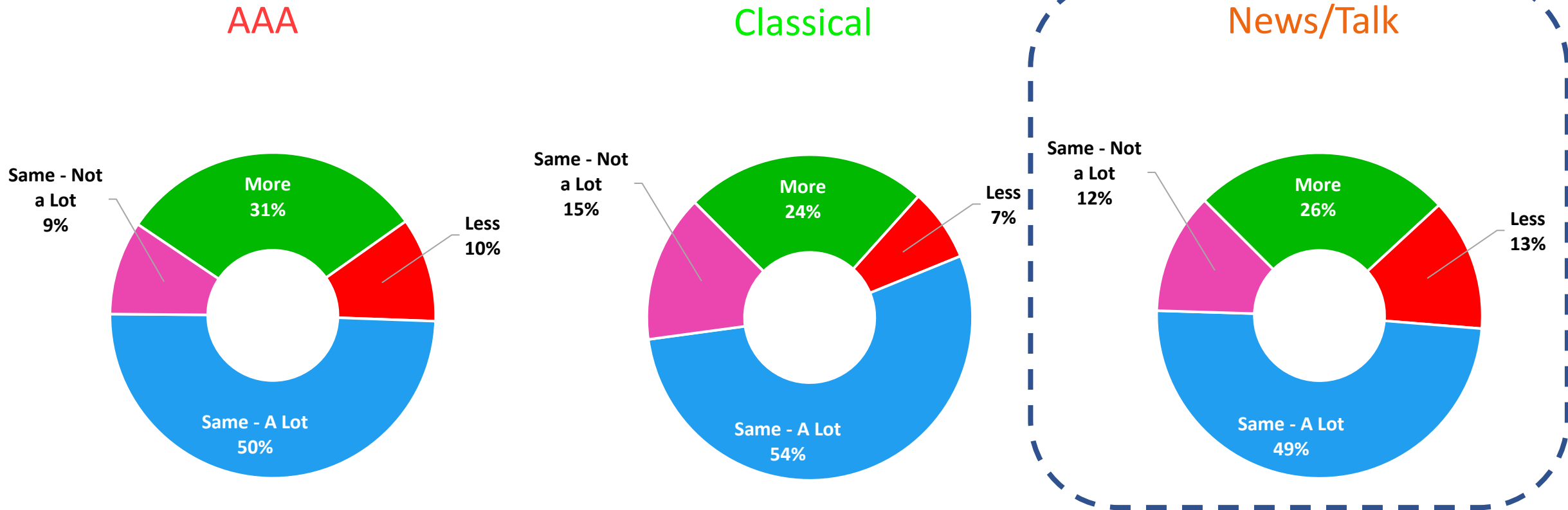


Greatest



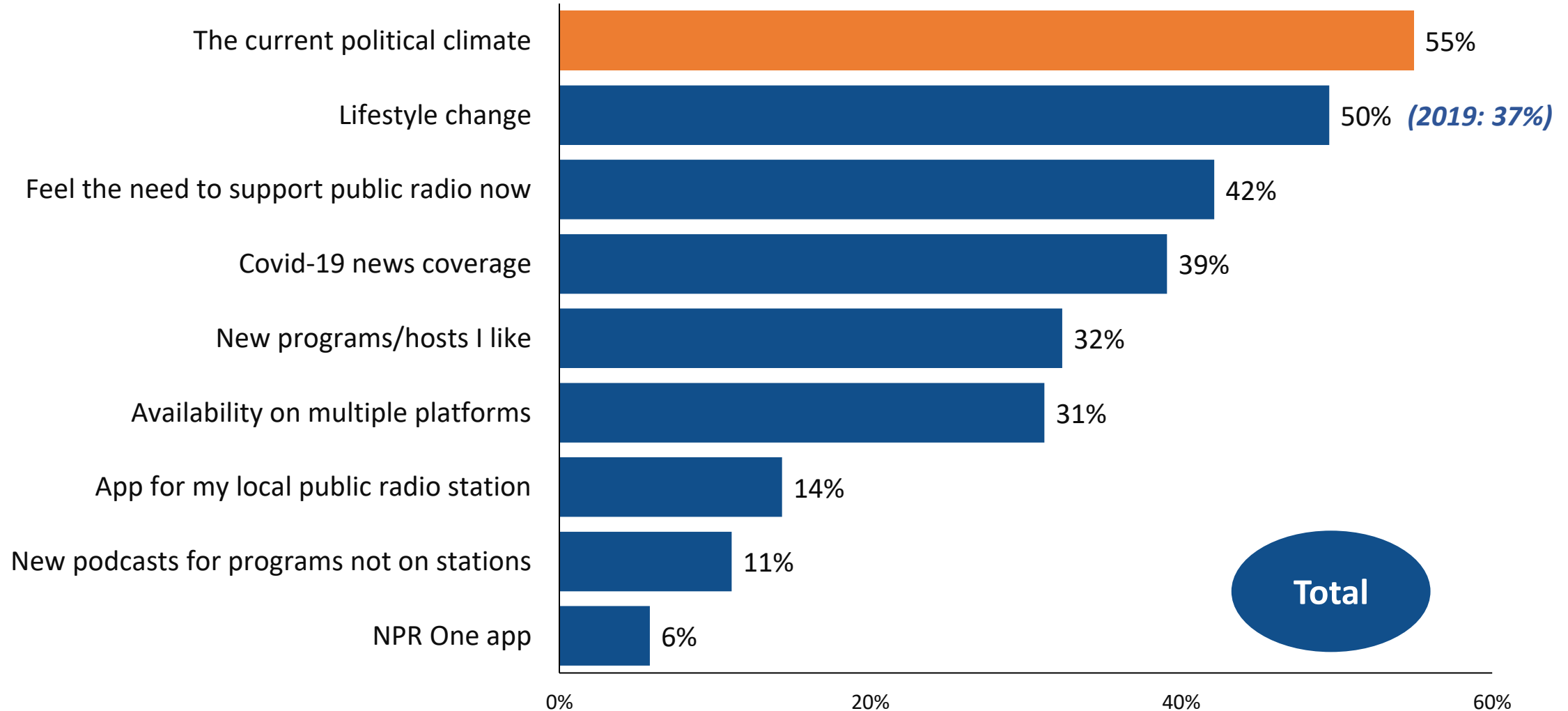
Among those who listen to AM/FM radio

In News/Talk, There's Momentum But Also Erosion – More Than in the Music Formats



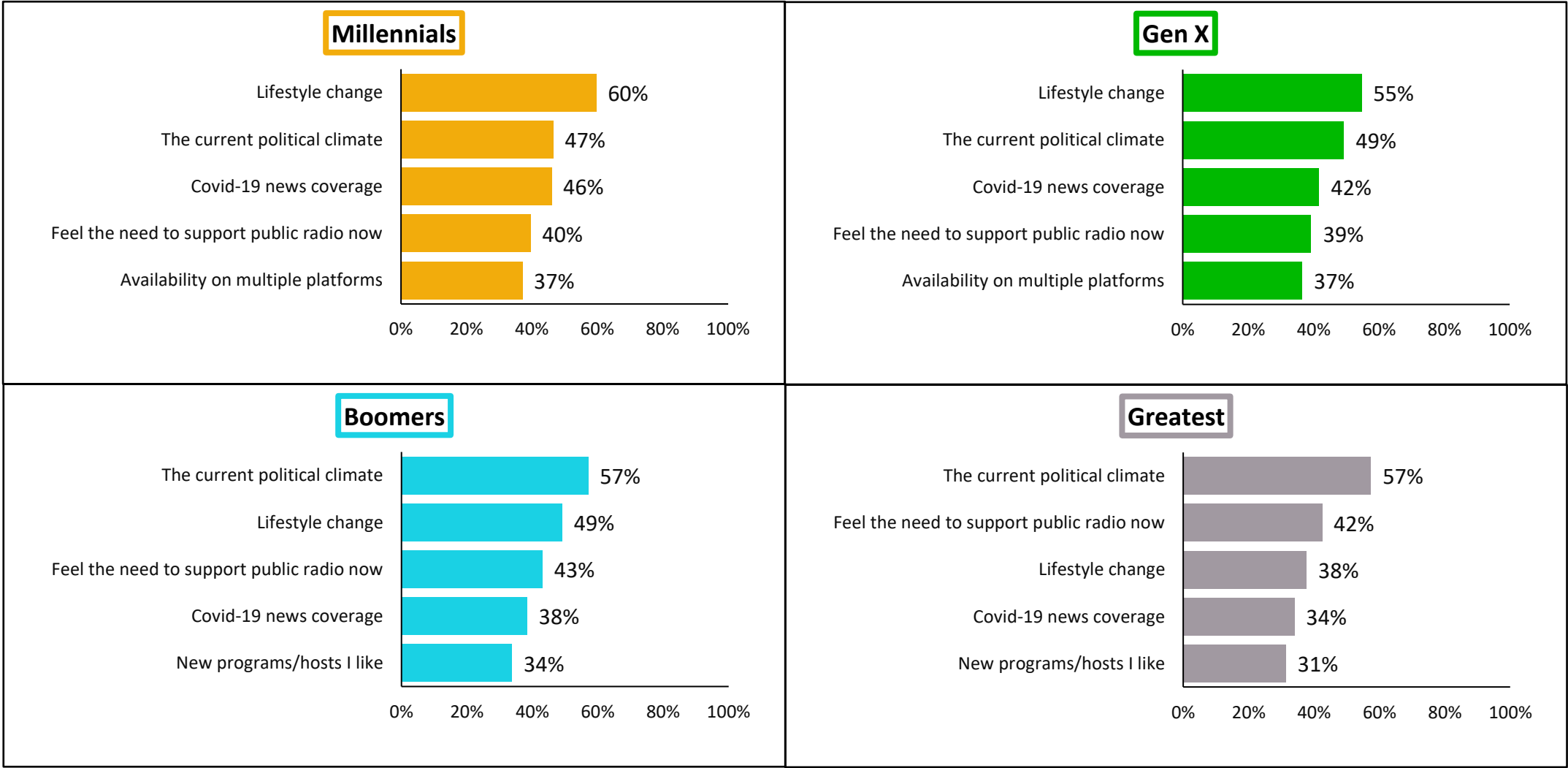
Among those who listen to AM/FM radio

Main Reasons For Listening to Public Radio More



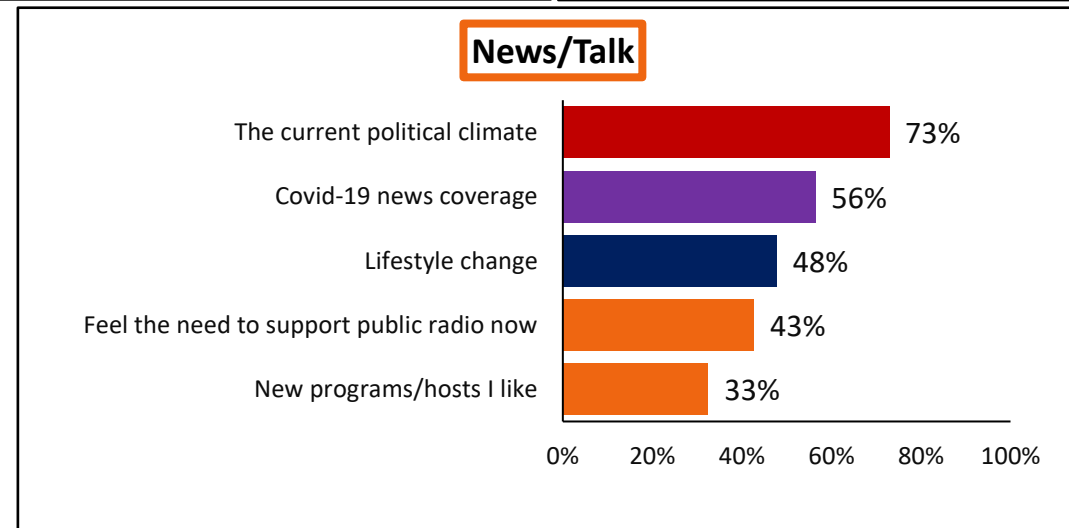
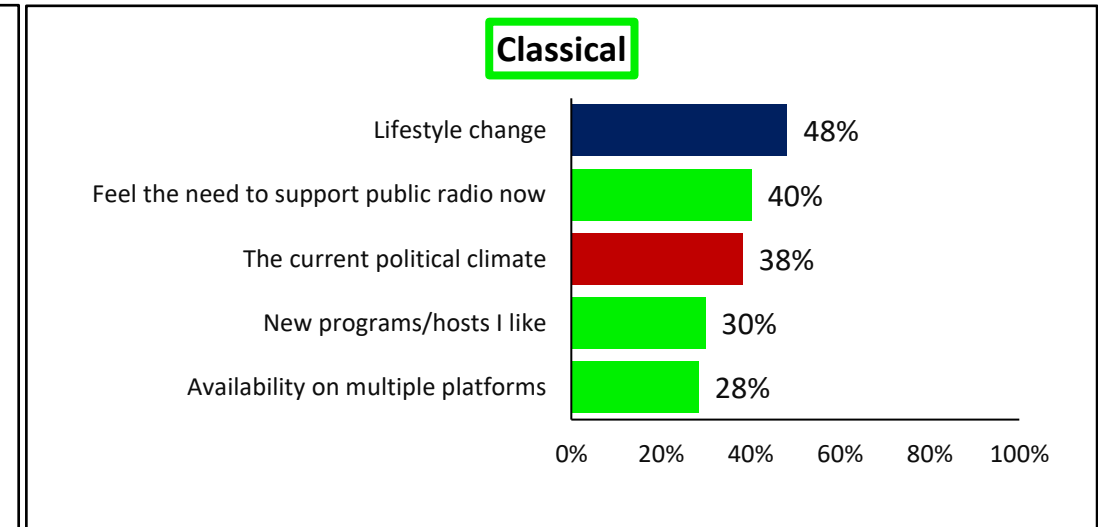
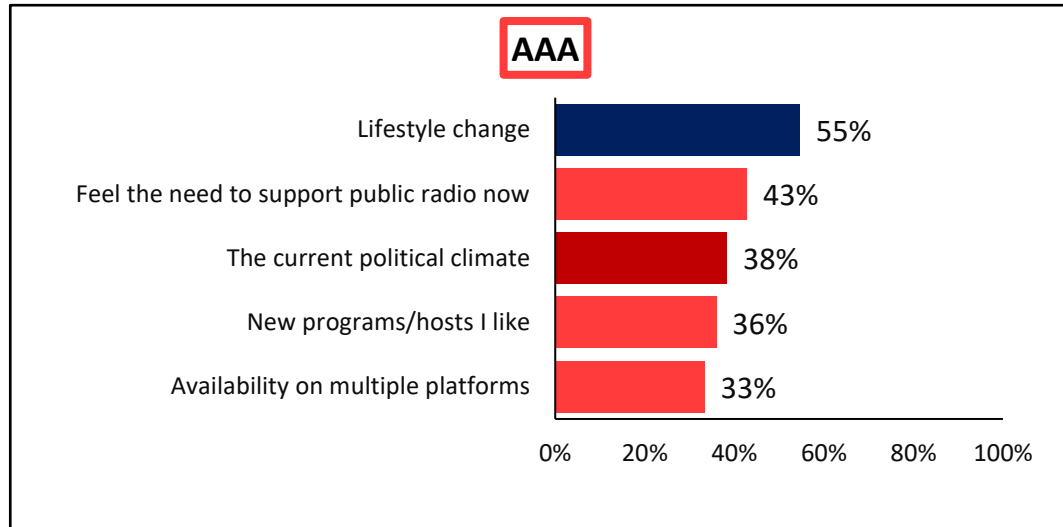
Among the 26% who say they are listening to public radio more in the past year,
% who say this is a main reason they listen more

Main Reasons For Listening to Public Radio More - Generations



Among those who say they are listening to public radio more in the past year,
% who say this is a main reason they listen more (Top 5 Reasons)

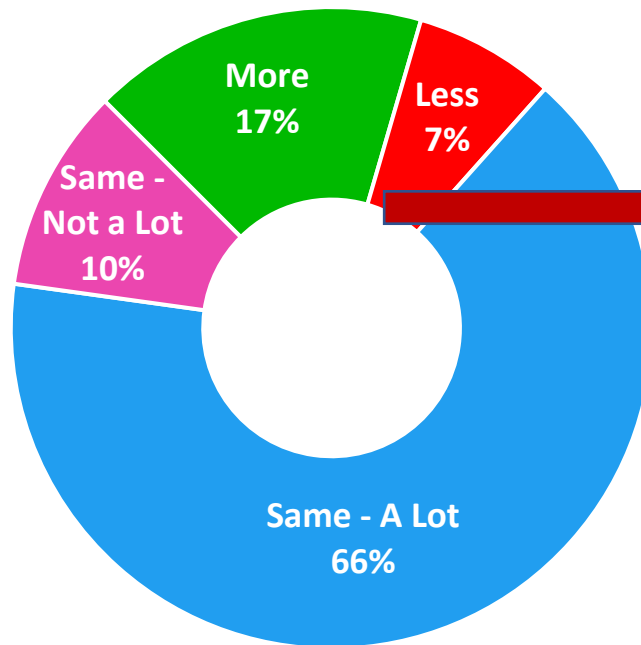
Main Reasons For Listening to Public Radio More - Formats



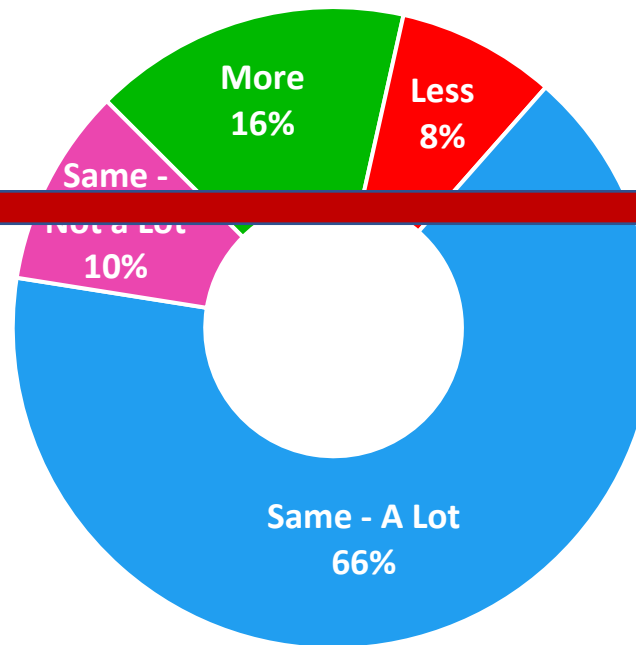
Among those who say they are listening to public radio more in the past year,
% who say this is a main reason they listen more (Top 5 Reasons)

Listening to Public Radio Less in the Past Year

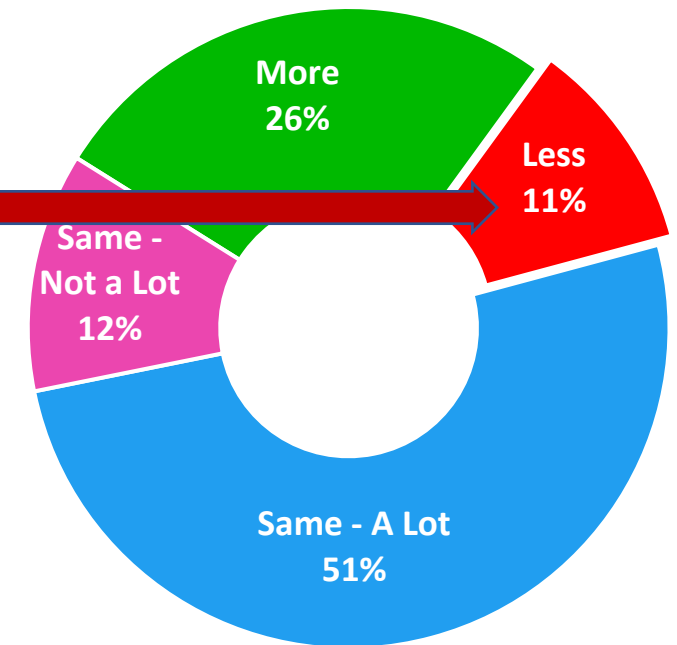
PRTS 2018



PRTS 2019

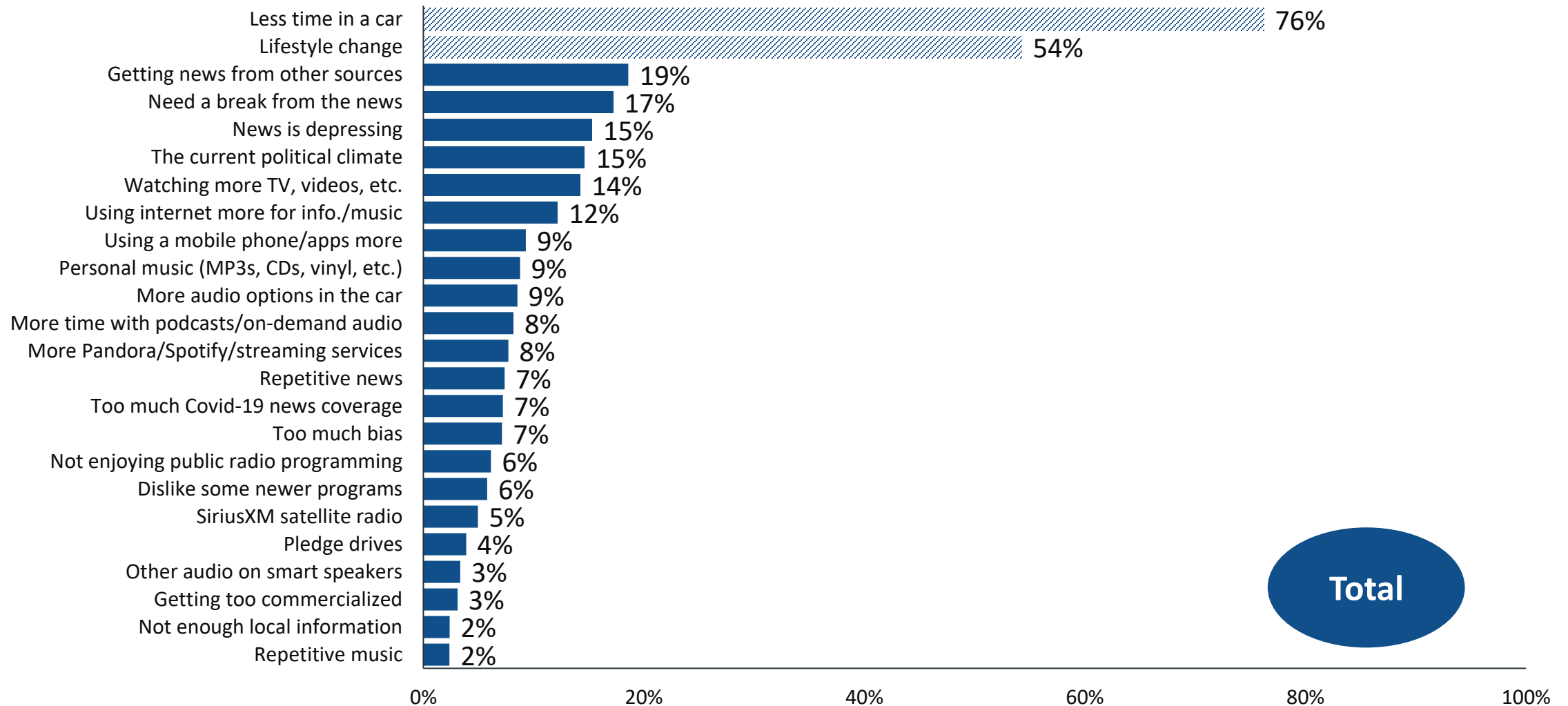


PRTS 2020



Among those who listen to AM/FM radio

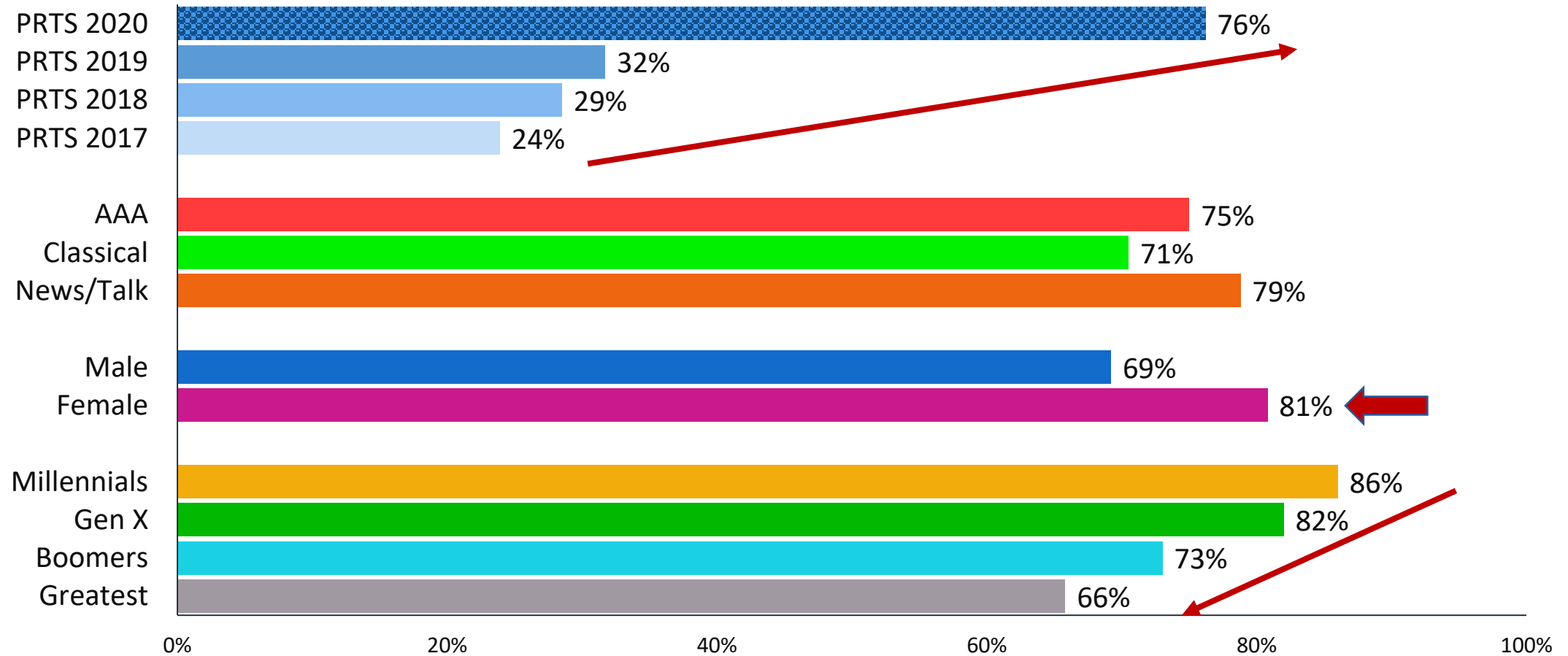
Main Reasons For Listening to Public Radio Less



Among the 11% who say they are listening to public radio less in the past year,
% who say this is a main reason they listen less

A Main Reason For Listening to Public Radio Less:

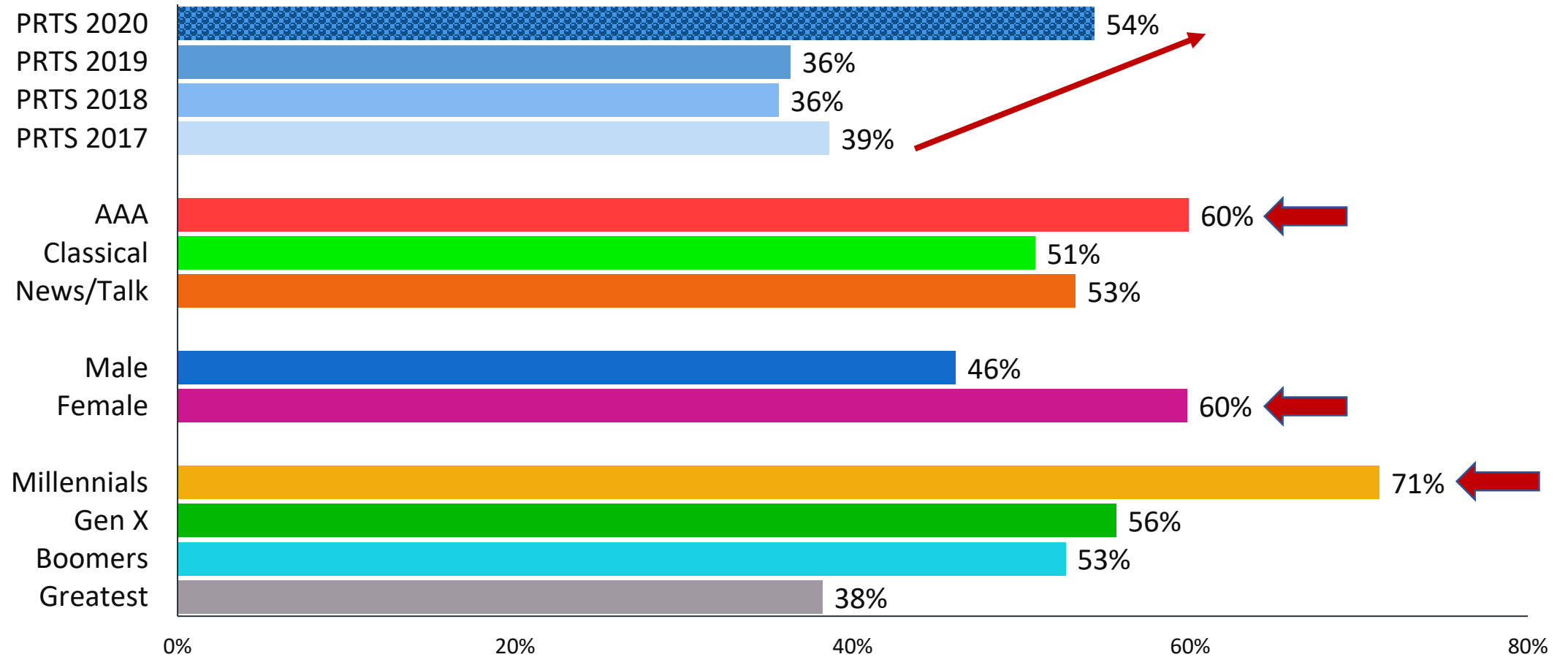
“Spending Less Time in a Car”



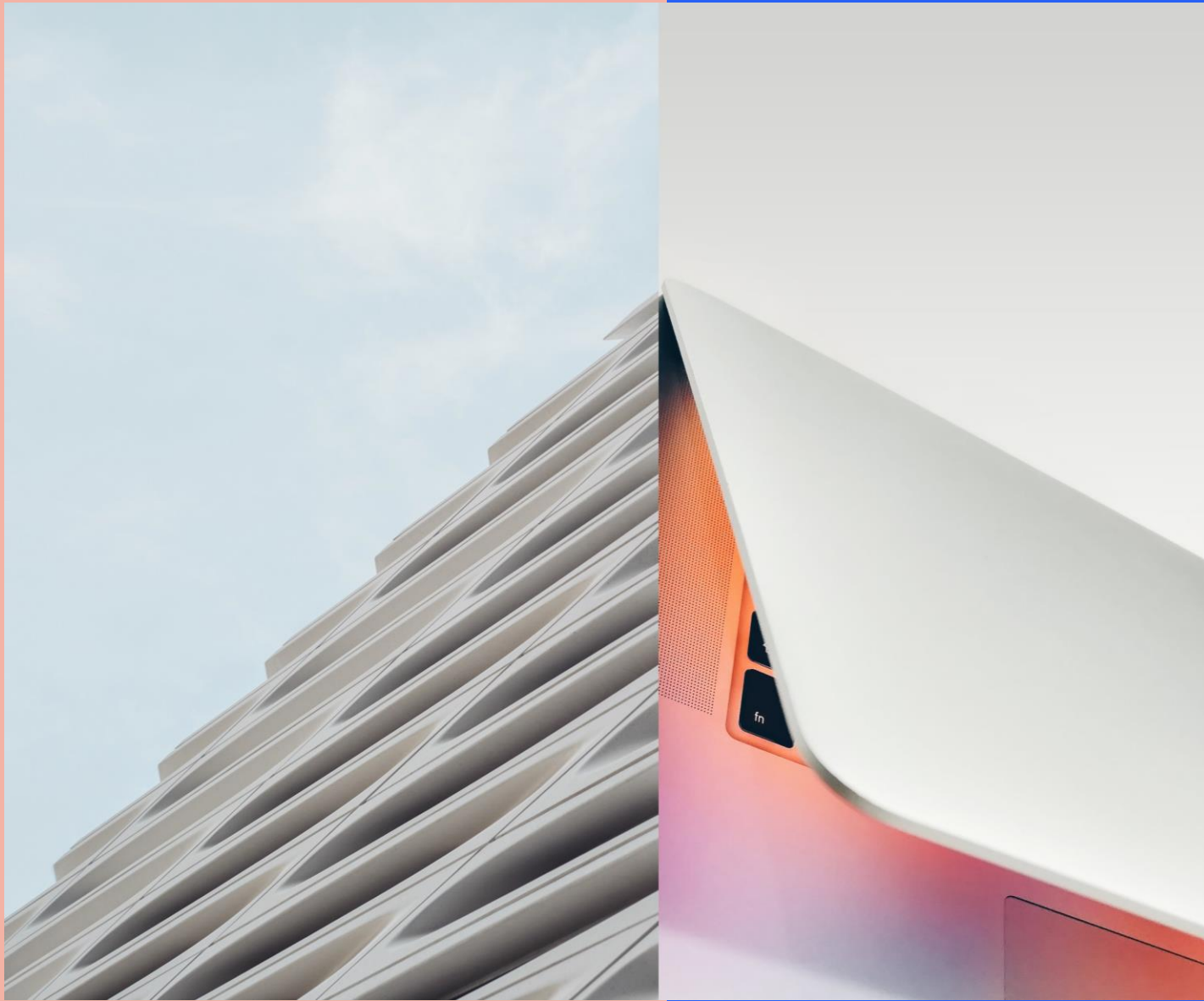
Among those who say they are listening to public radio less in the past year,
% who say this is a main reason they listen less

A Main Reason For Listening to Public Radio Less:

“A Lifestyle Change”



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



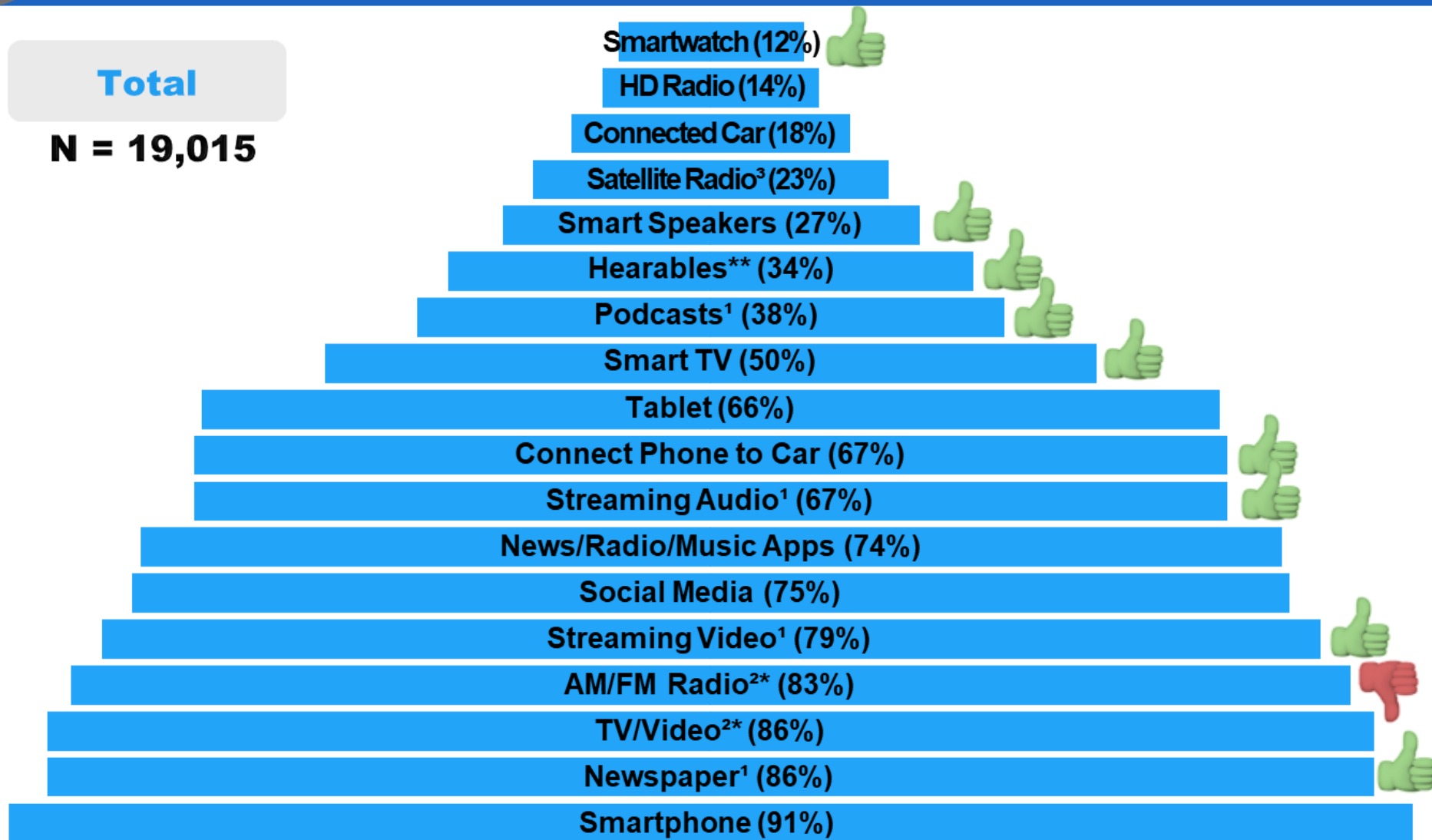
Media & Brand Pyramids



Media Pyramid 2020

Total

N = 19,015



Total
PRTS 2019

9%

14%

19%

22%

24%

34%

45%

66%

64%

60%

72%

73%

69%

86%

85%

82%

89%

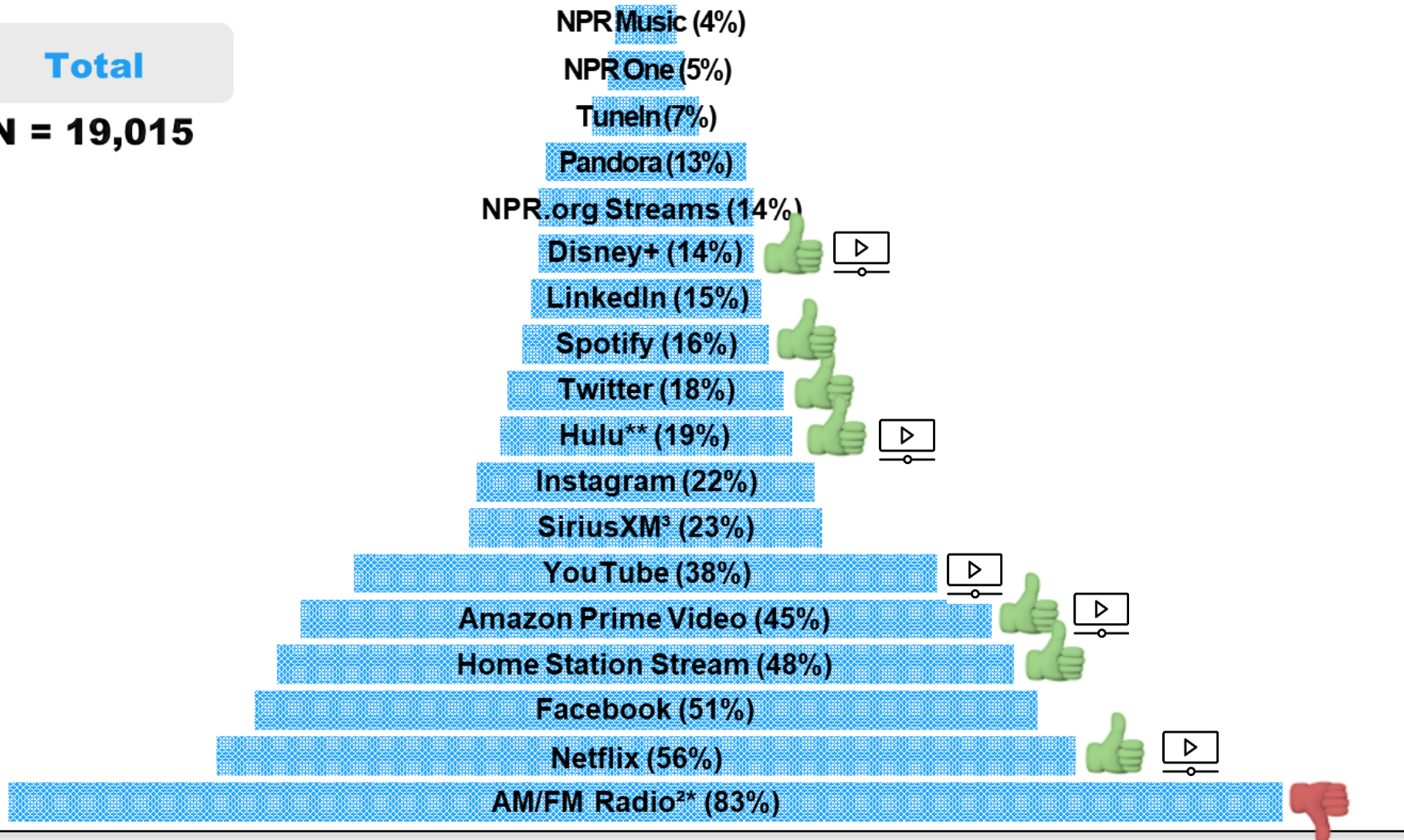
¹ Weekly or more ² 1+ hour per day ³ Paid & trial users *Any platform/device **Wireless headphones/earbuds



Brand Pyramid 2020

Total

N = 19,015



Total PRTS 2019
5%
5%
7%
14%
14%

14%
12%
15%
15%
20%
22%
38%
38%
43%
50%
52%
86%

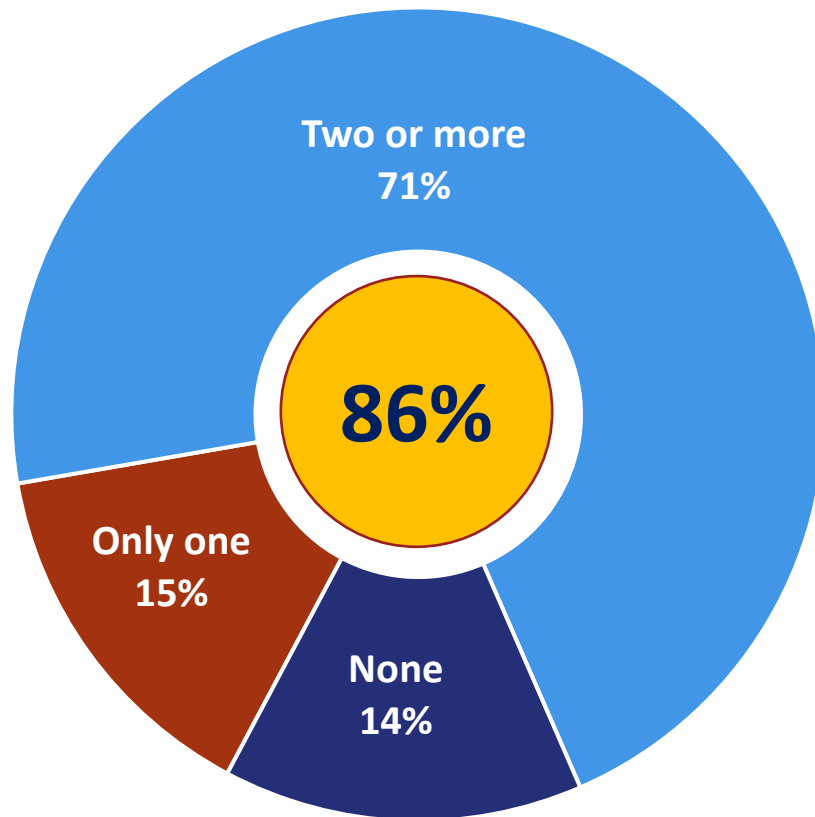
All weekly use unless noted ² 1+ hour per day ³ Paid & trial users *Any Platform/Device **Includes Live TV



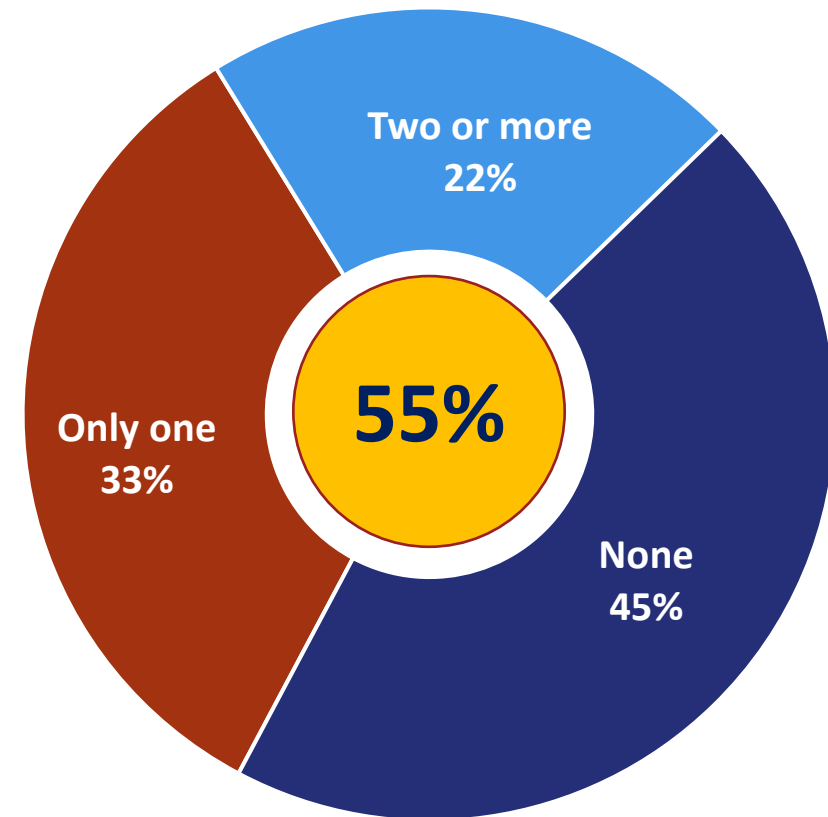
Streaming: Video and Audio

More Subscribe to Video Streaming Services Than Audio Streaming Services – By Far

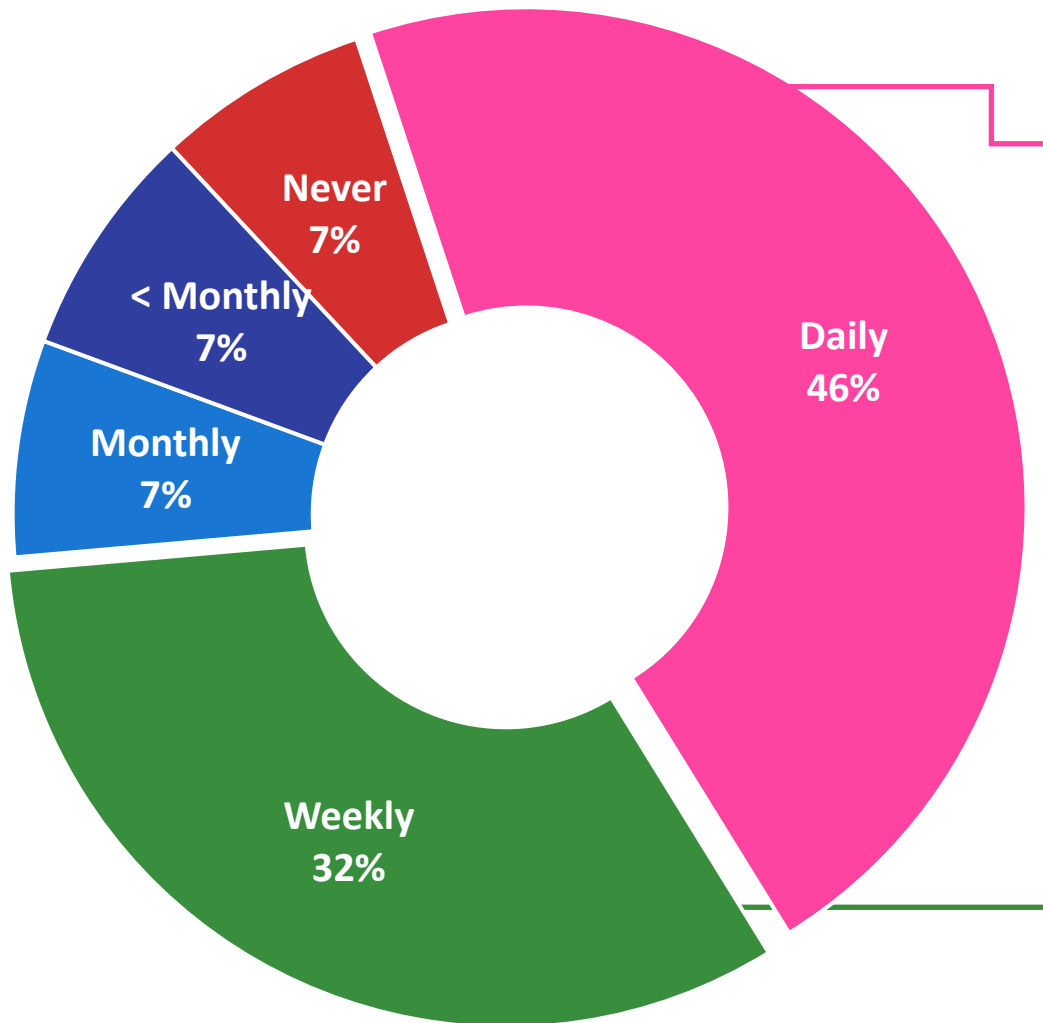
Paid **VIDEO** Streaming Subscriptions



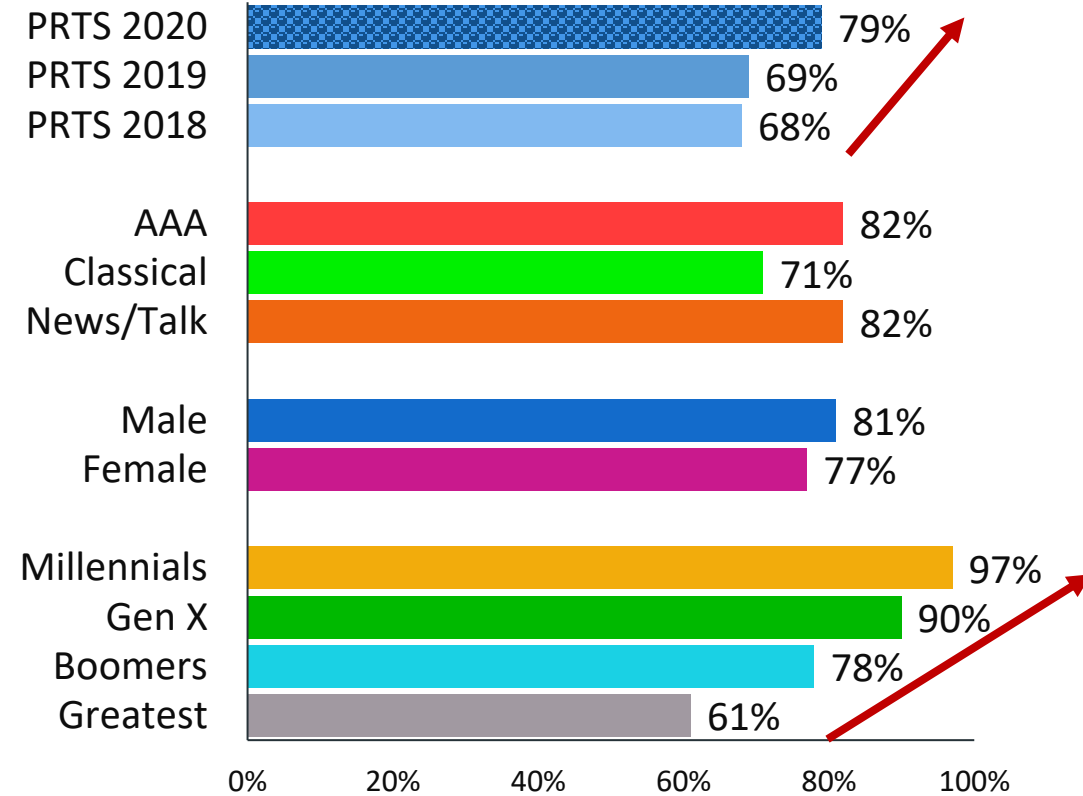
Paid **AUDIO** Streaming Subscriptions



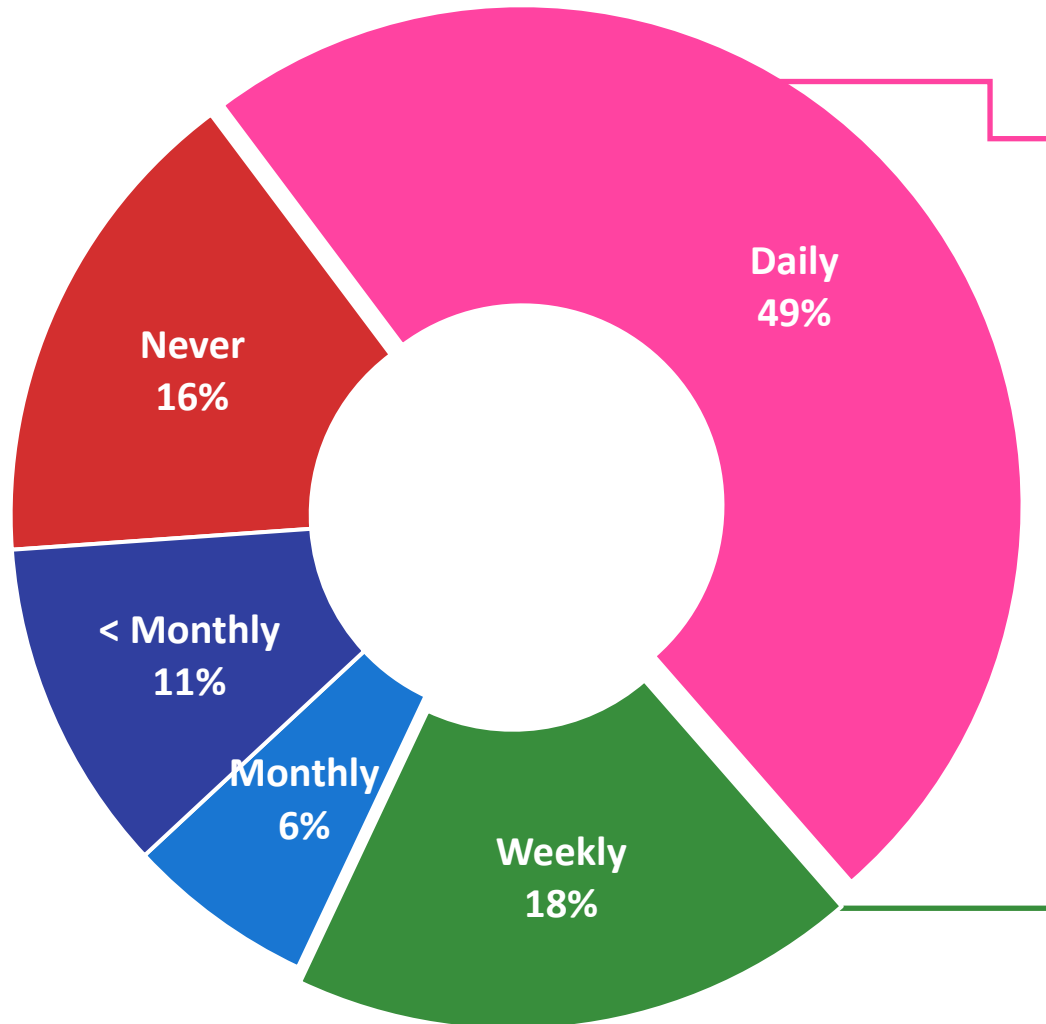
Streaming Video Jumps During COVID, and Usage Is Nearly Universal Among Younger Generations



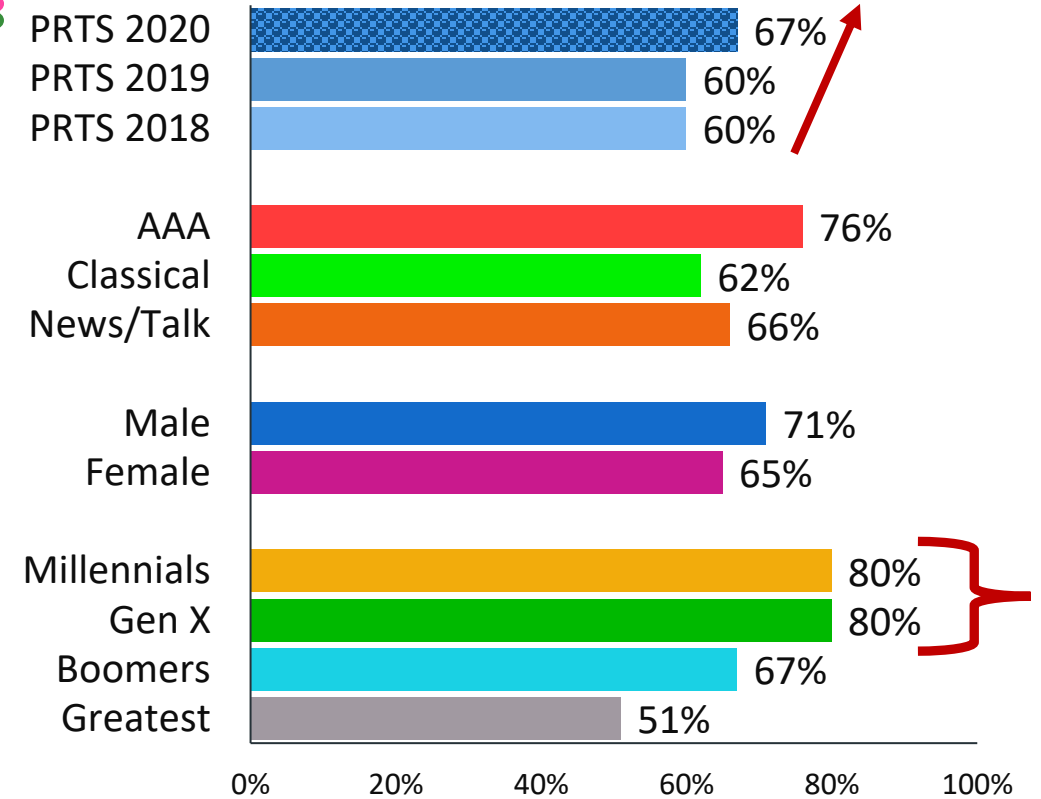
% Who Watch Streaming Video Weekly or More



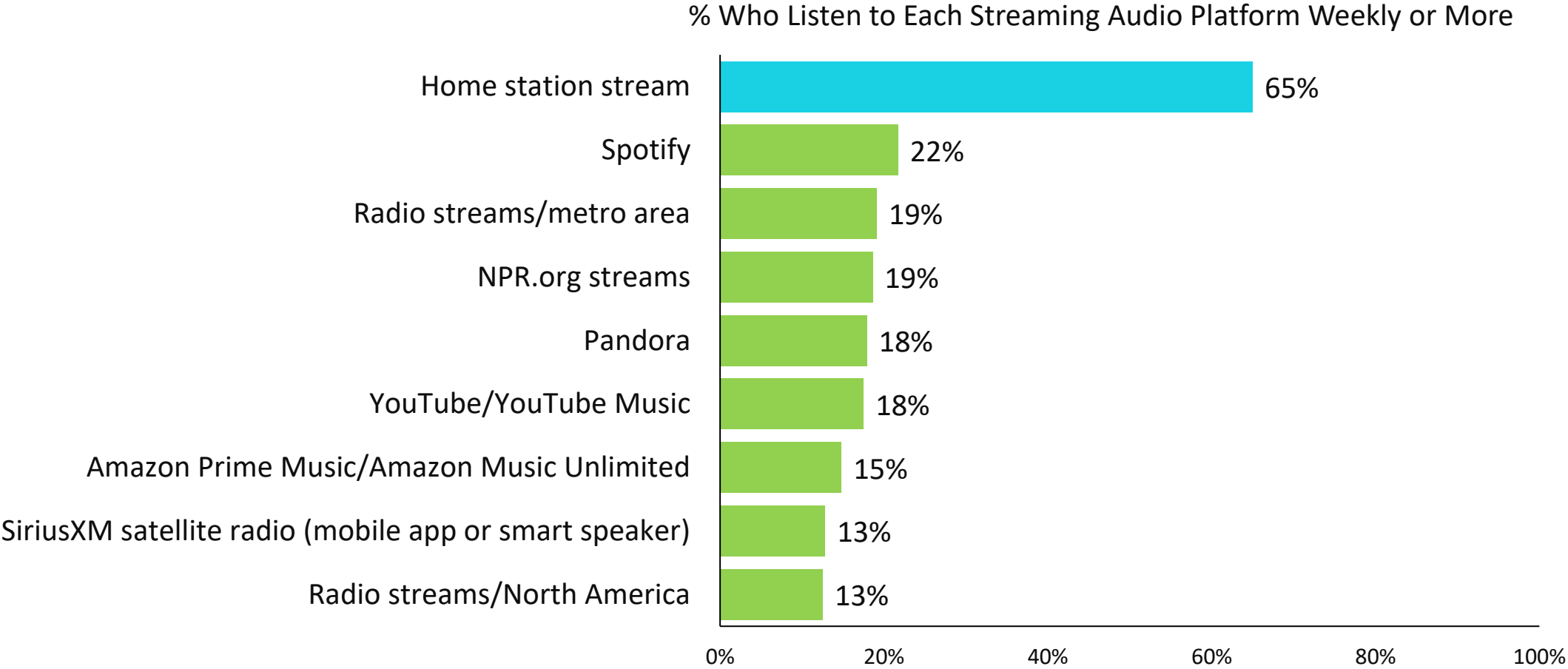
About Half Listen to Streaming Audio Daily; Weekly Usage Grows to Two in Three



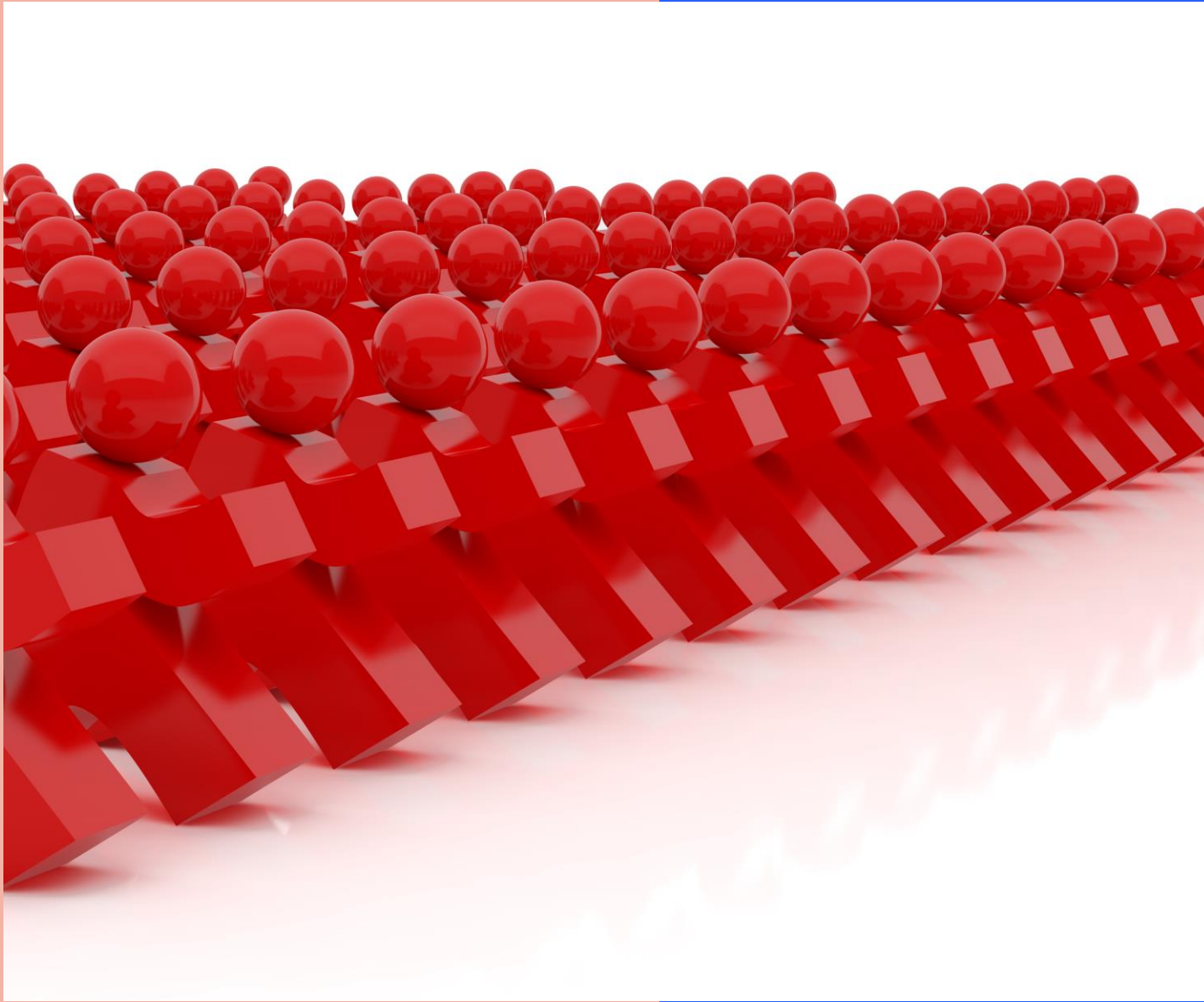
% Who Listen to Streaming Audio Weekly or More



Almost Two in Three Streaming Audio Users Listen to the Home Station's Stream Weekly or More, Far Ahead of Other Types of Online Audio



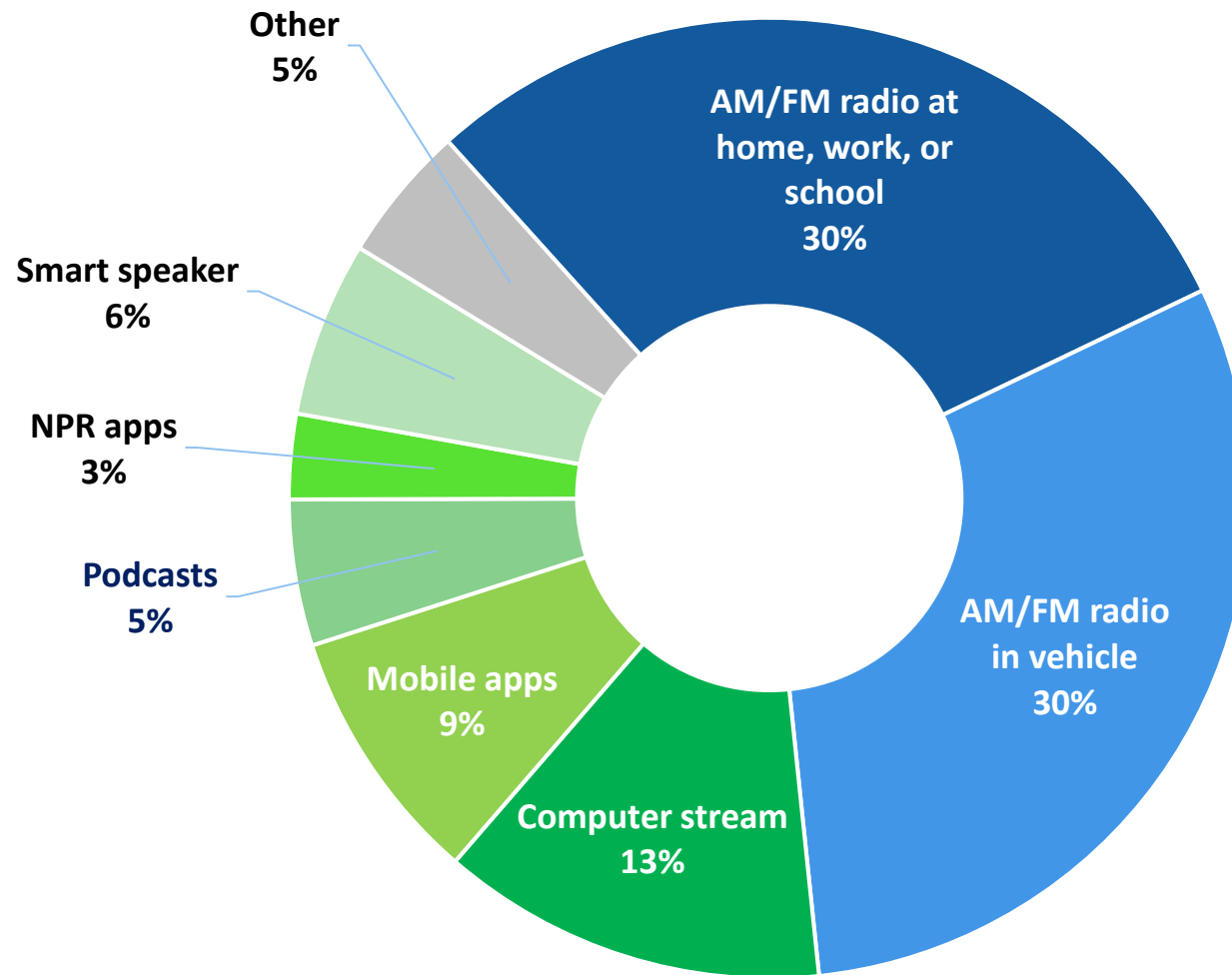
Among those who listen to streaming audio monthly or more
(top 9 platforms shown)



The March To Digital Just Sped Up

Home Station Listening Platforms

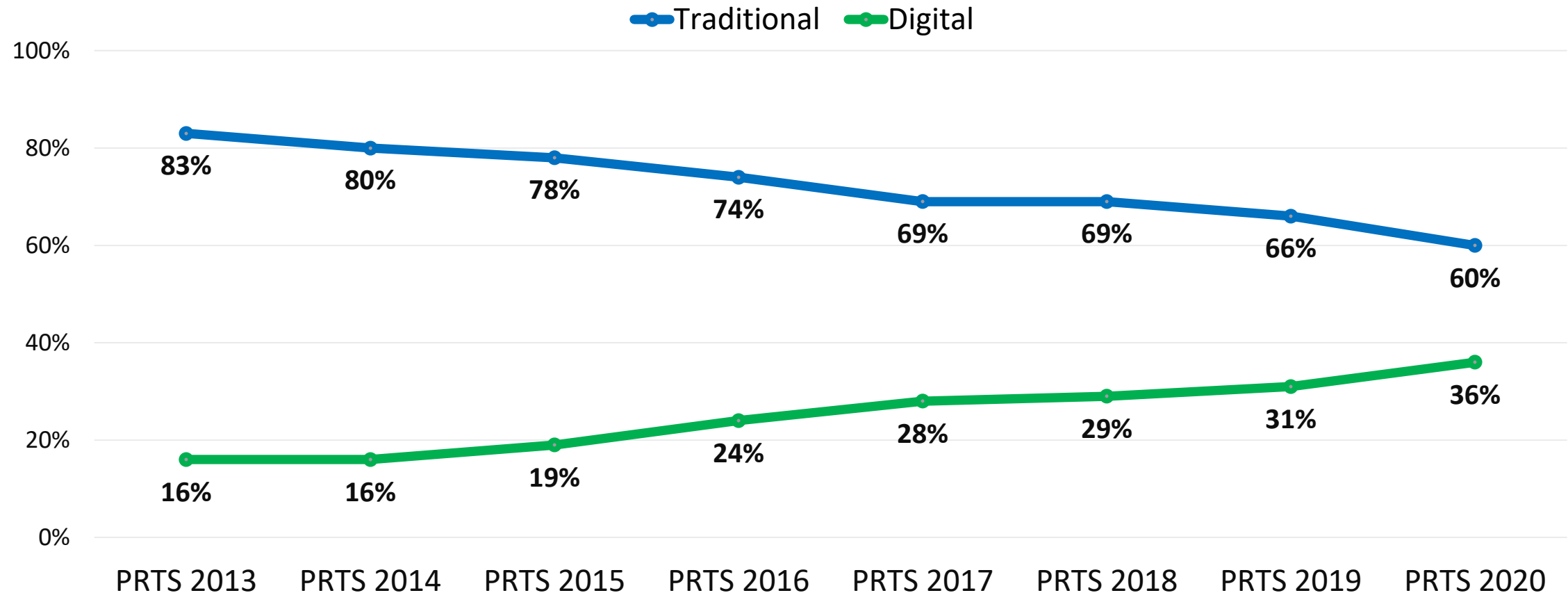
Total



Traditional – 60%
Digital – 36%

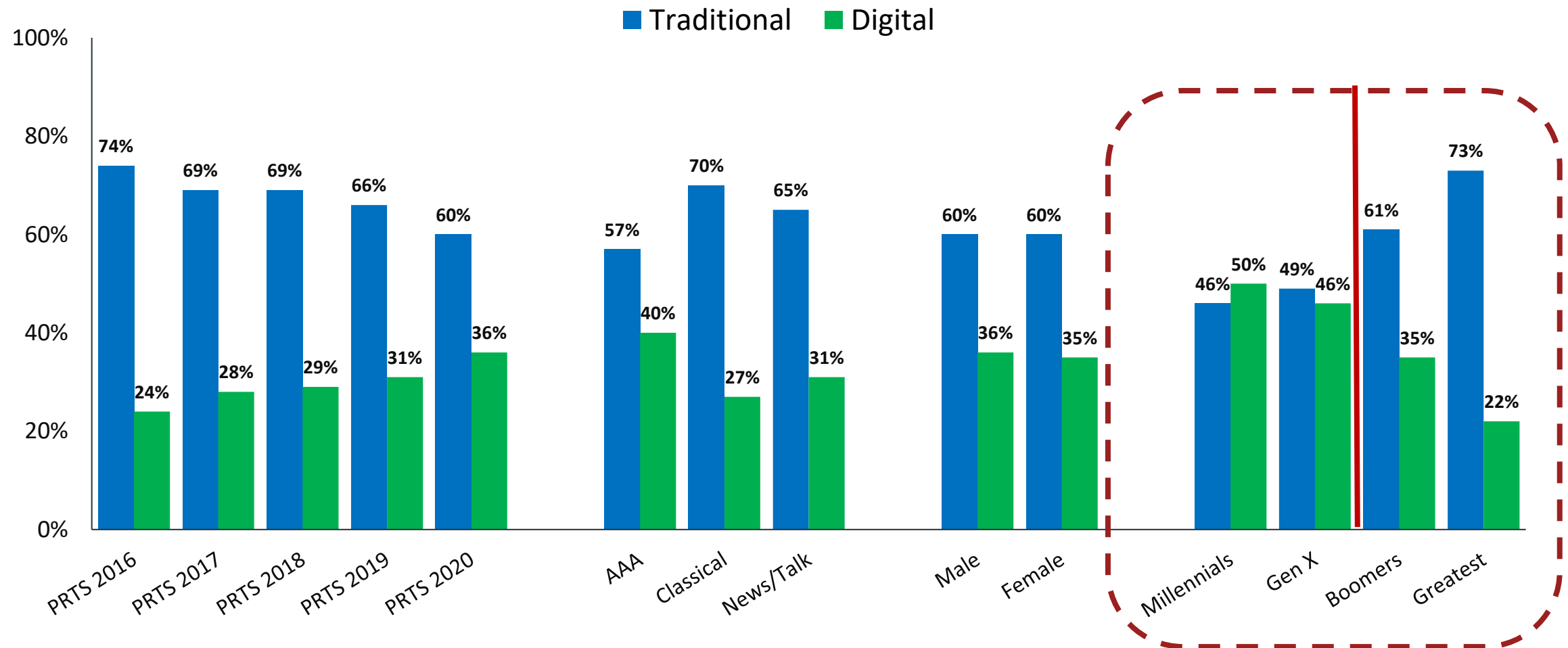
PRTS 2019
Traditional – 66%
Digital – 31%

Home Station Listening Platforms: Traditional vs. Digital

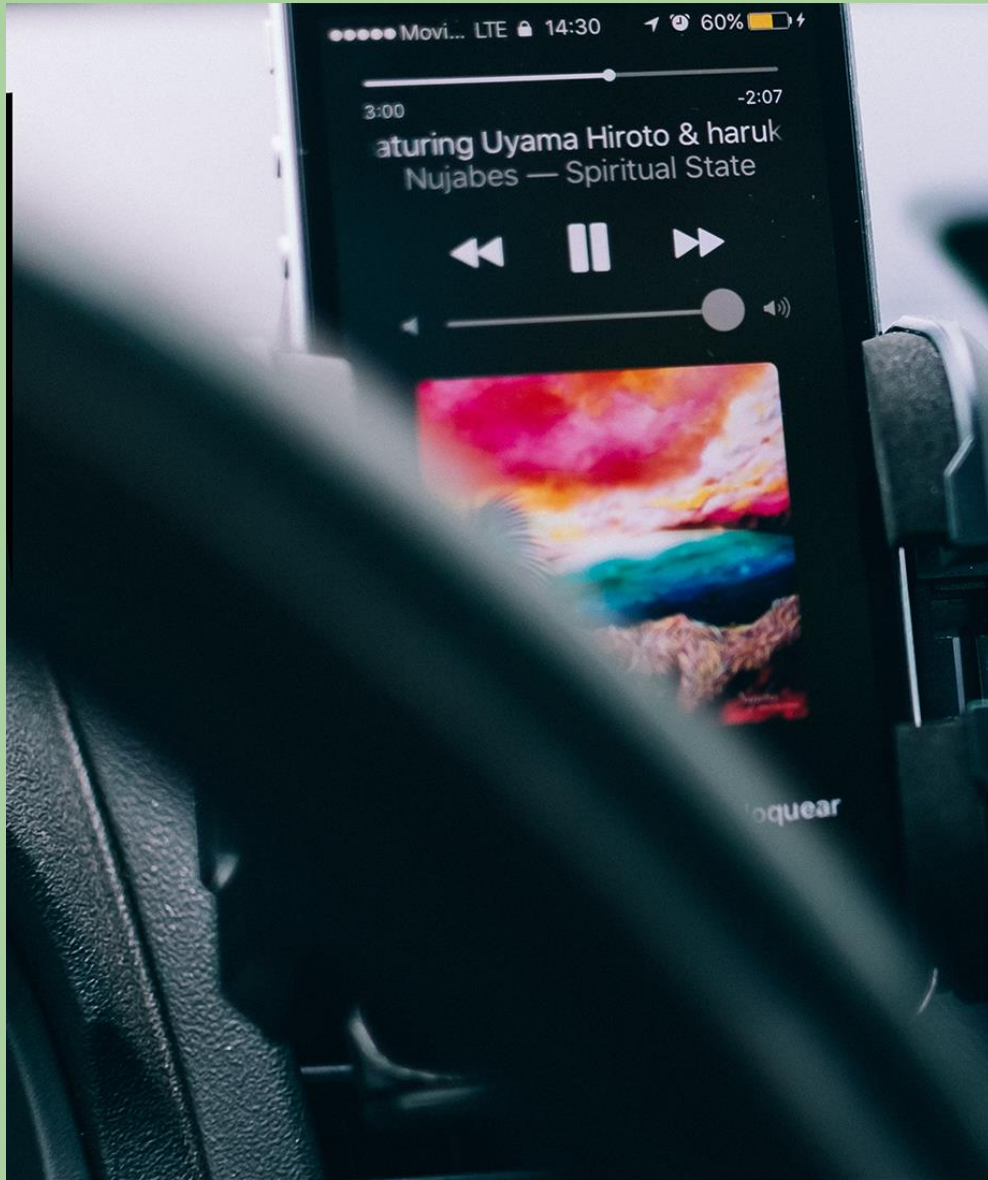


% of time spent with home station in a typical week via
traditional platforms (an AM/FM radio at home/school/work or in a vehicle)
vs. digital platforms (computer, mobile/NPR apps, podcasts, smart speaker)

Home Station Listening Platforms: Traditional vs. Digital

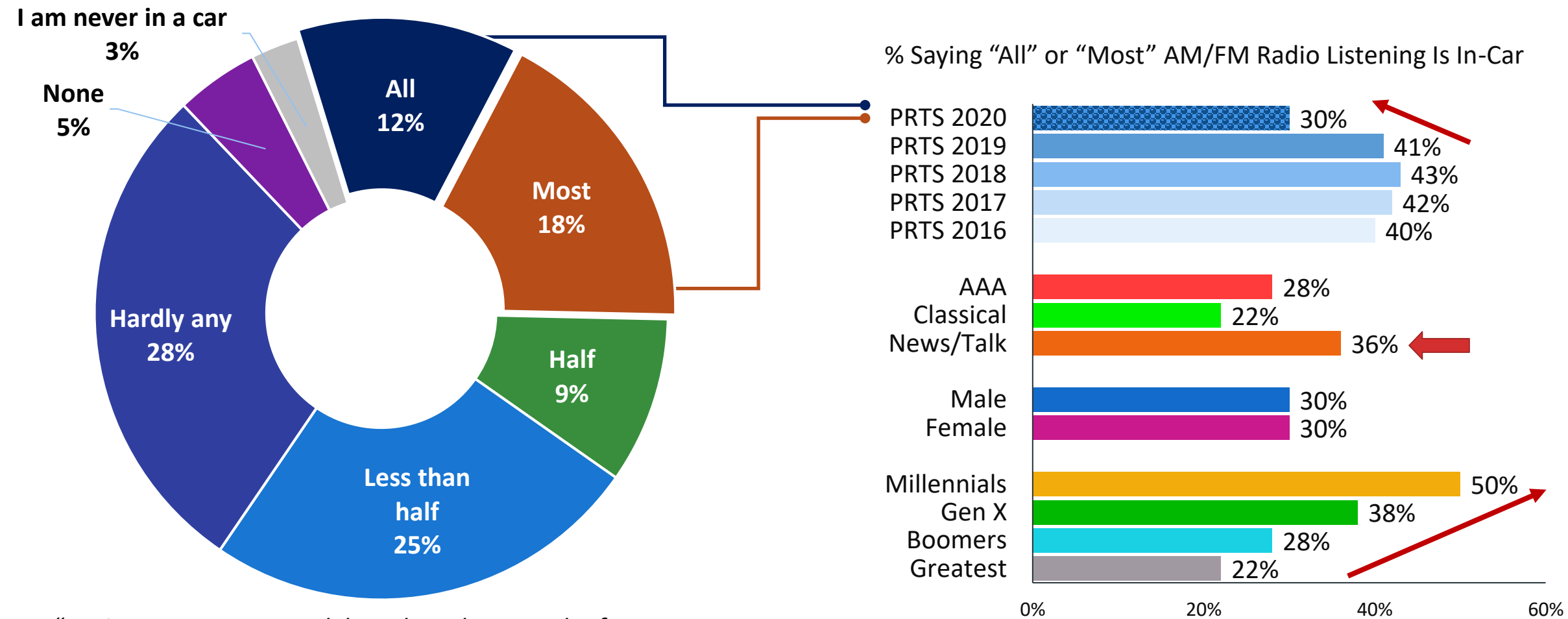


% of time spent with home station in a typical week via
traditional platforms (an AM/FM radio at home/school/work or in a vehicle)
vs. digital platforms (computer, mobile/NPR apps, podcasts, smart speaker)



In-Car Audio

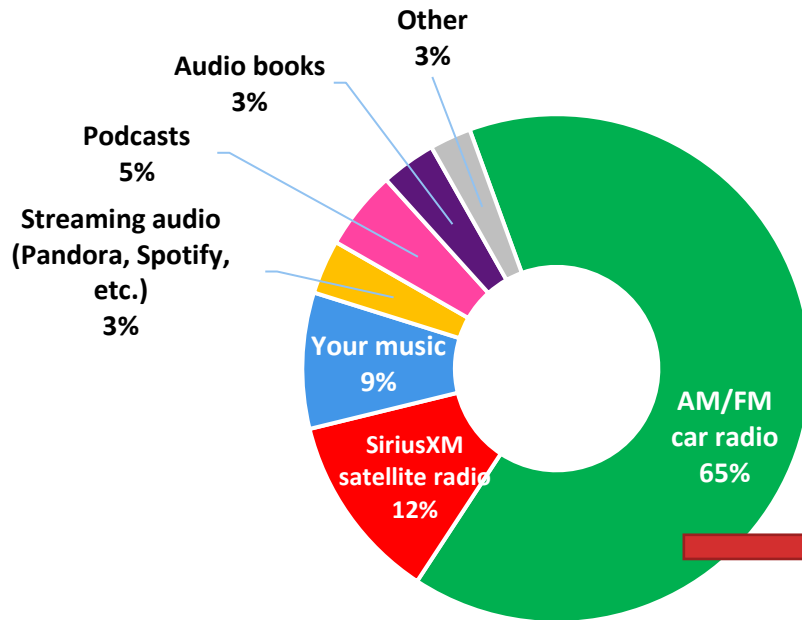
In the Time of COVID, Only Three in Ten Say All/Most of Their AM/FM Radio Listening Is In-Car; Highest Among Millennials



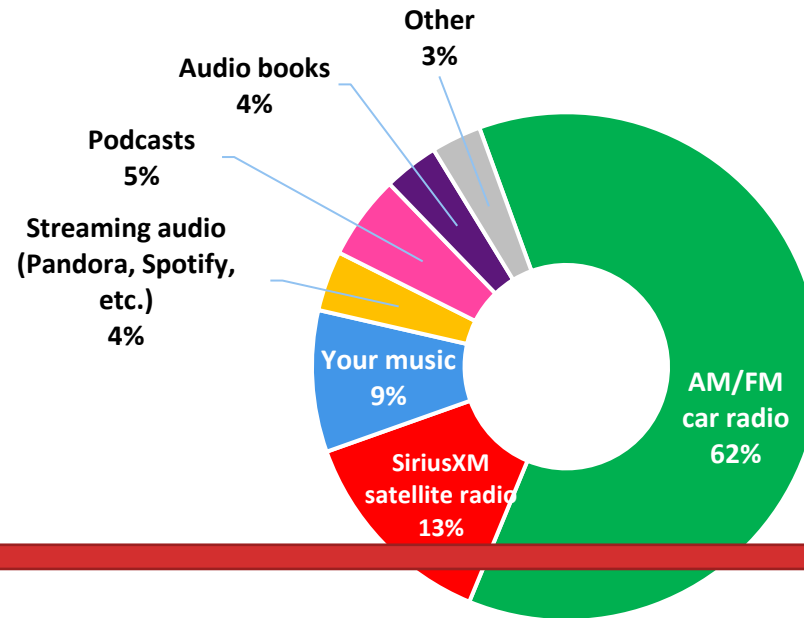
"During an average weekday, about how much of your total AM/FM radio listening time takes place in a car?"

In-Car Audio Usage *Total*

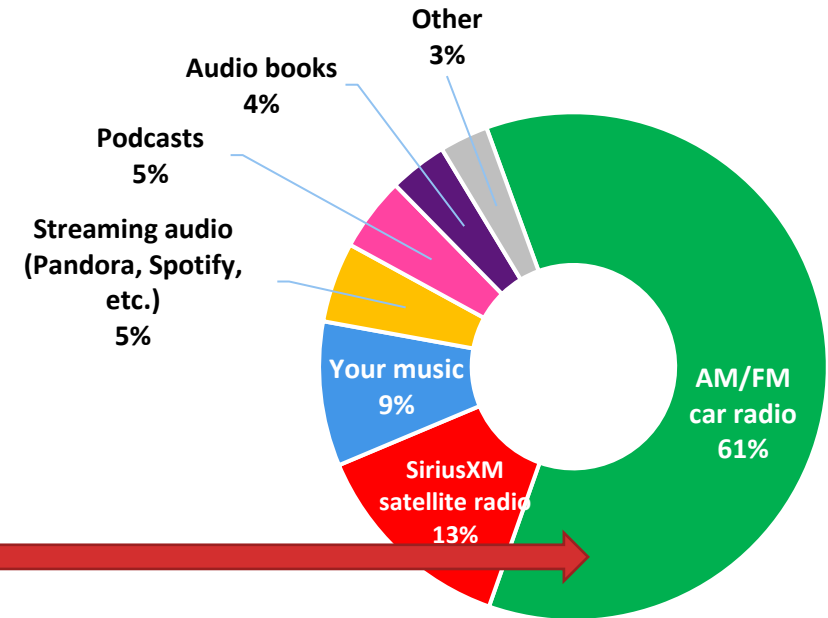
PRTS 2018

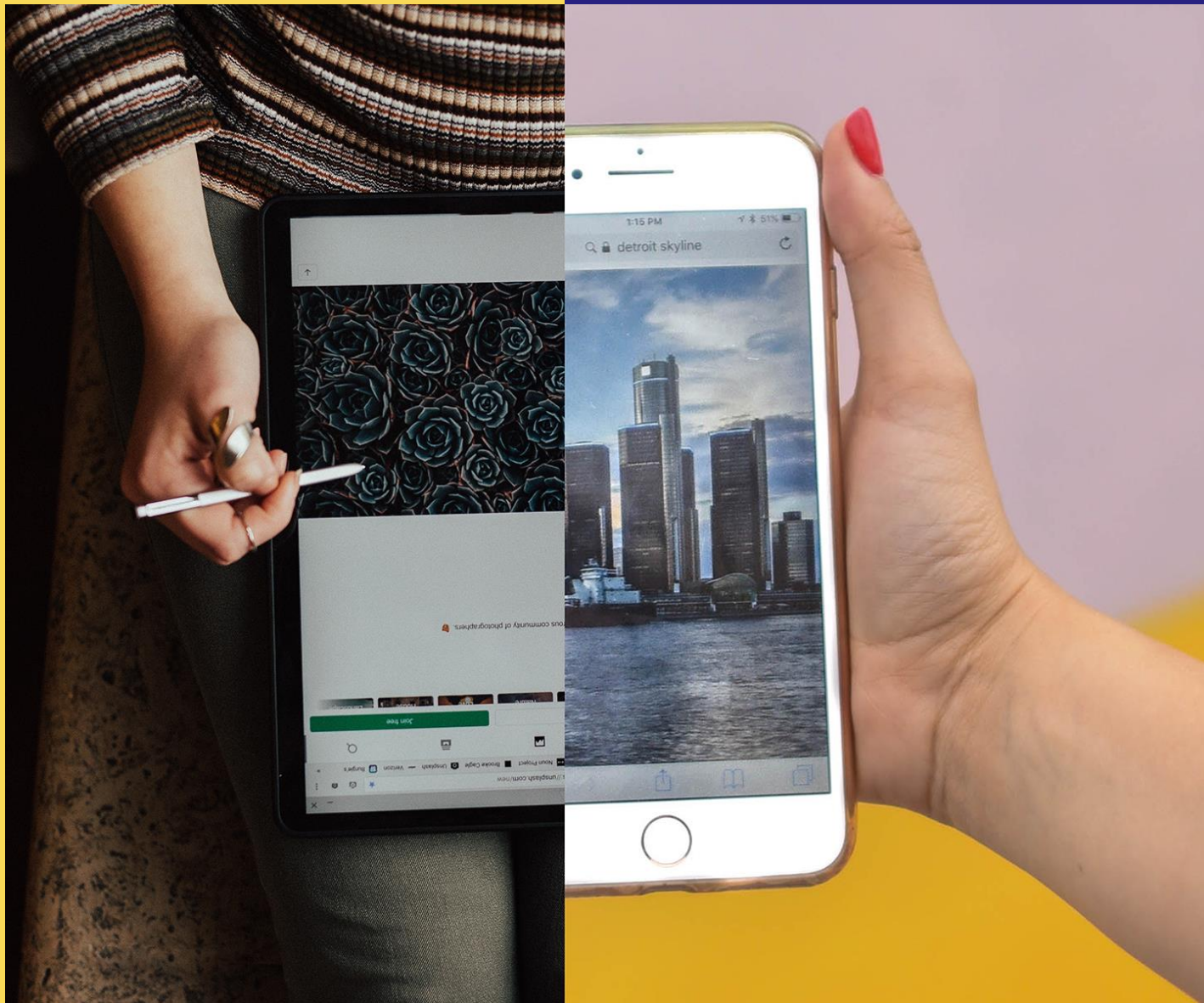


PRTS 2019



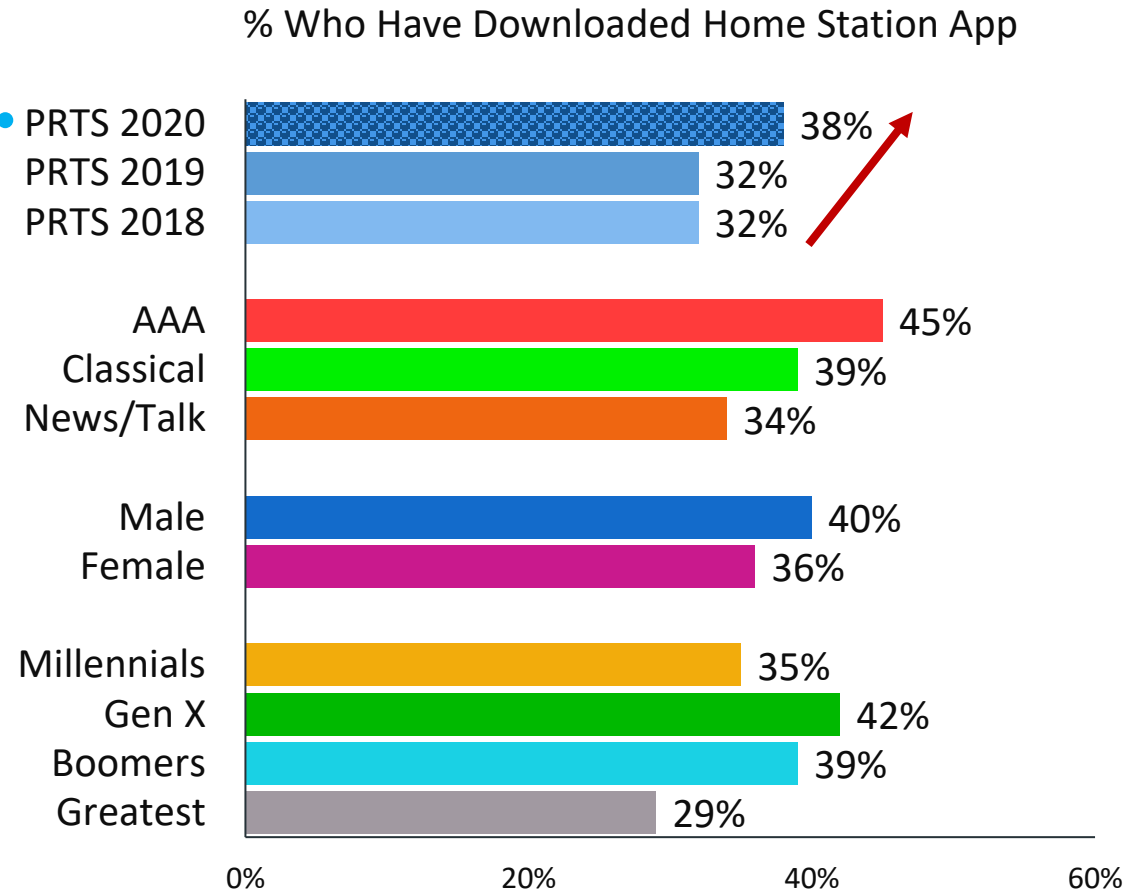
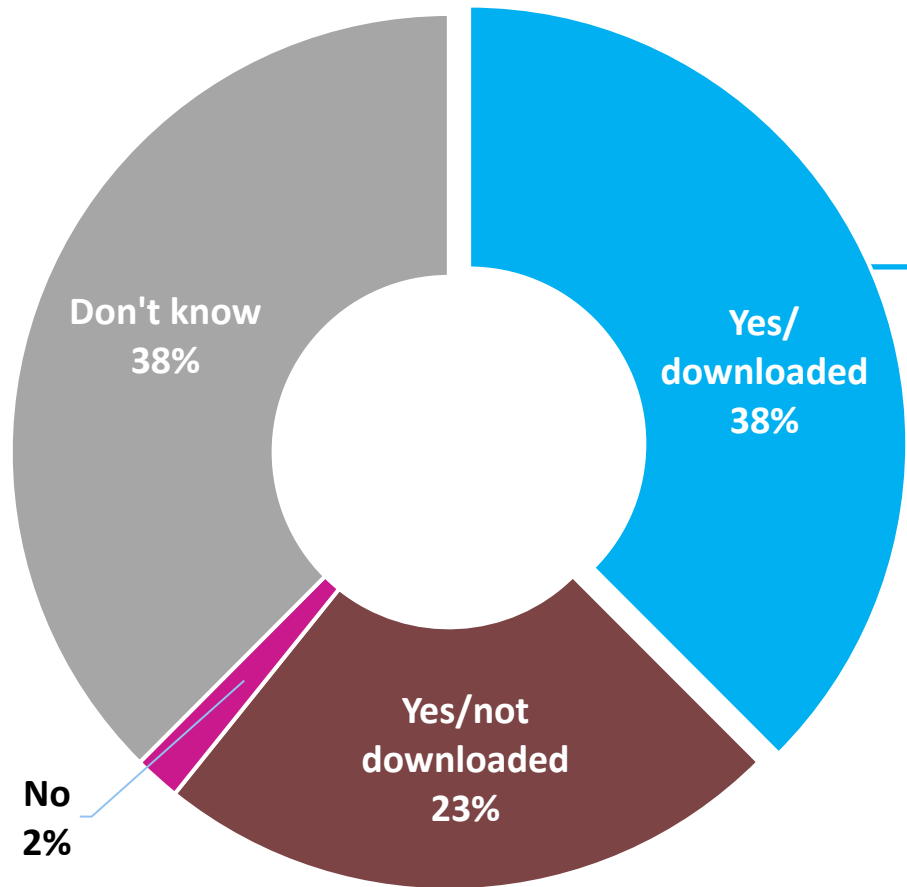
PRTS 2020





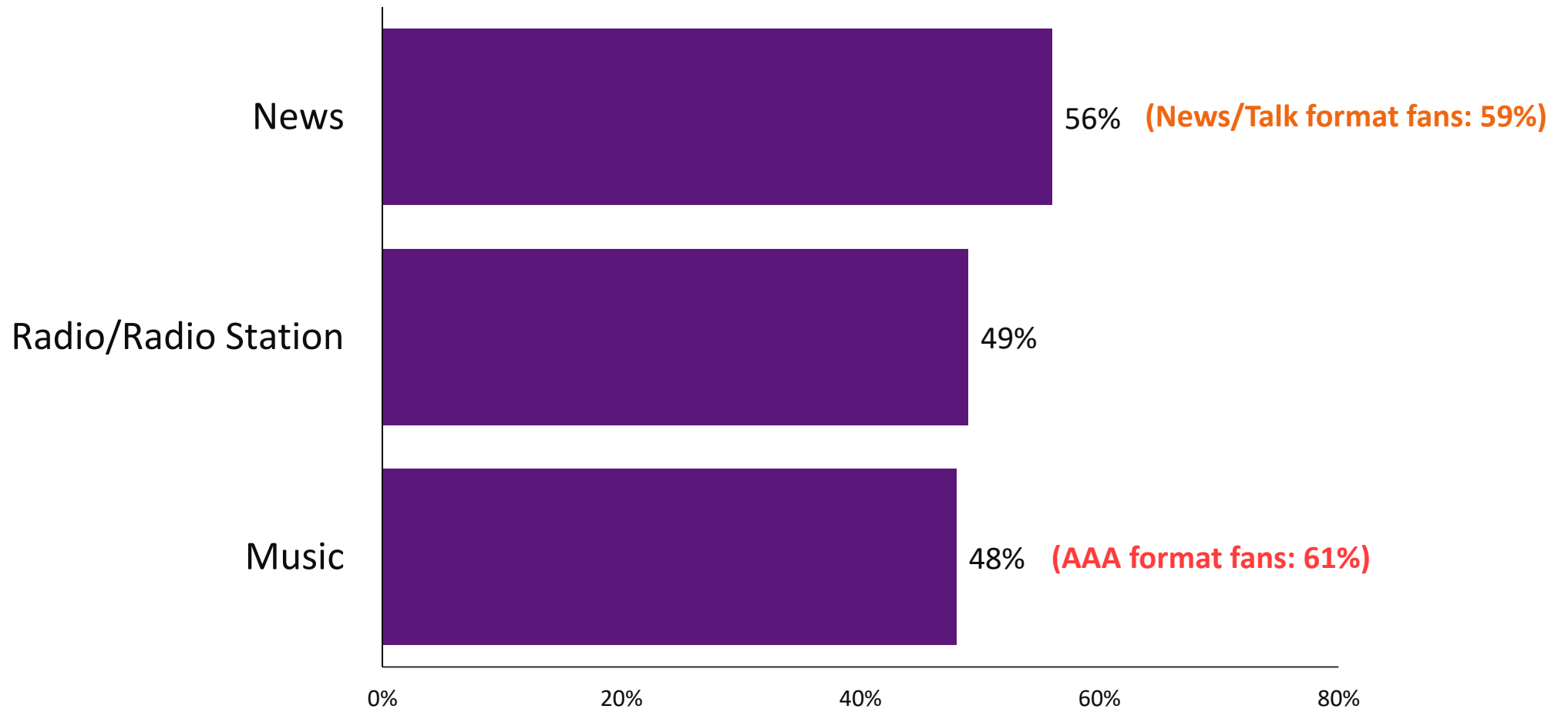
Mobile's Rising Importance

Nearly Four in Ten Mobile Device Owners Have Downloaded Their Home Station's App – the Highest in PRTS Studies



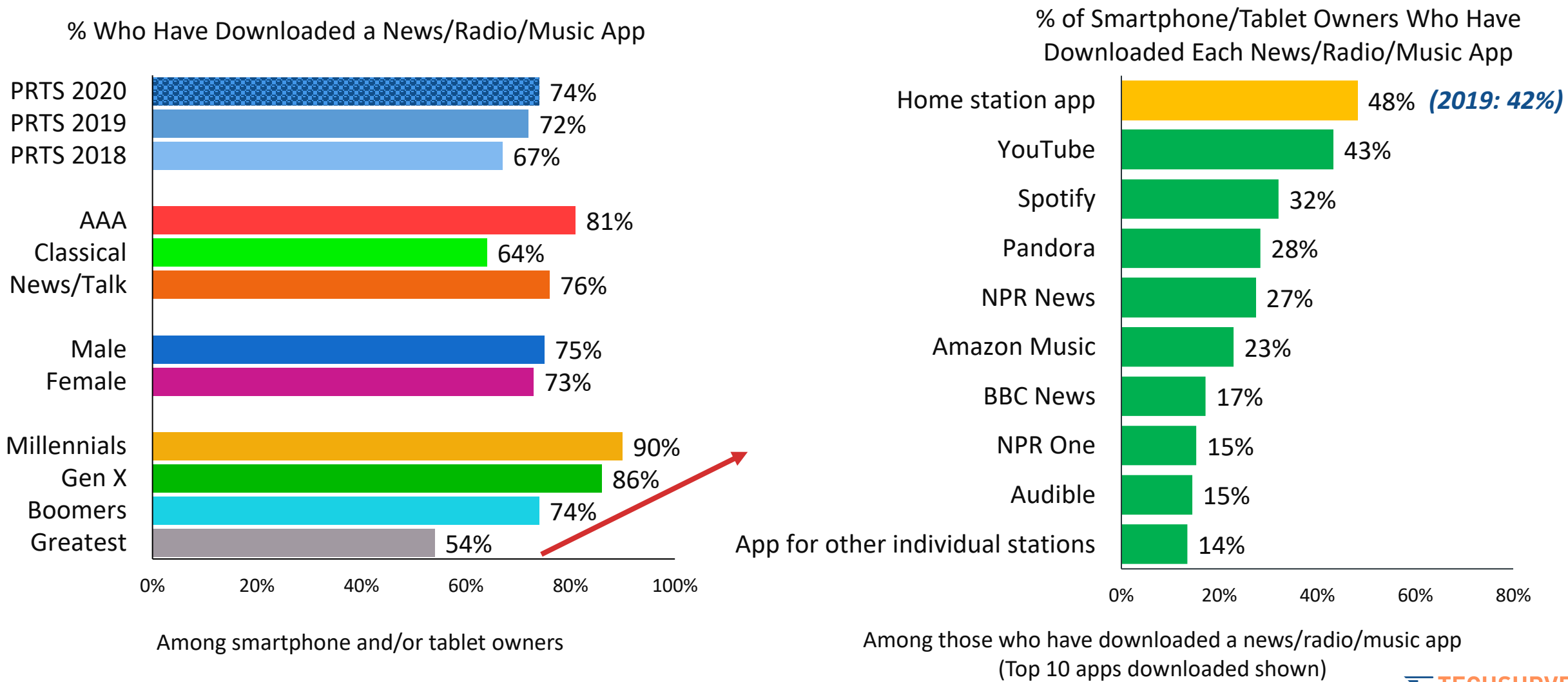
Among smartphone and/or tablet owners

At Least Half of Mobile Device Owners Have Downloaded News, Radio/Radio Station or Music Apps



Among smartphone/tablet owners, % who have downloaded each type of mobile app (multiple responses accepted)

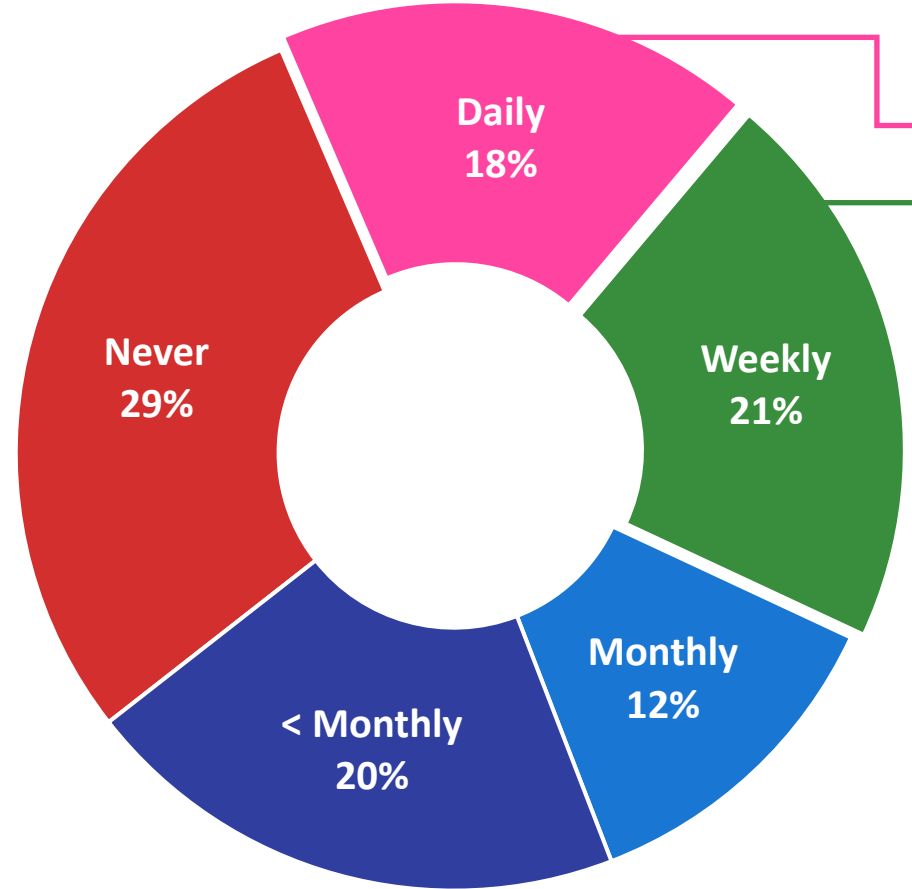
Three in Four Have Now Downloaded a News/Radio/Music App on Their Mobile Device; the Home Station App Is Most Downloaded



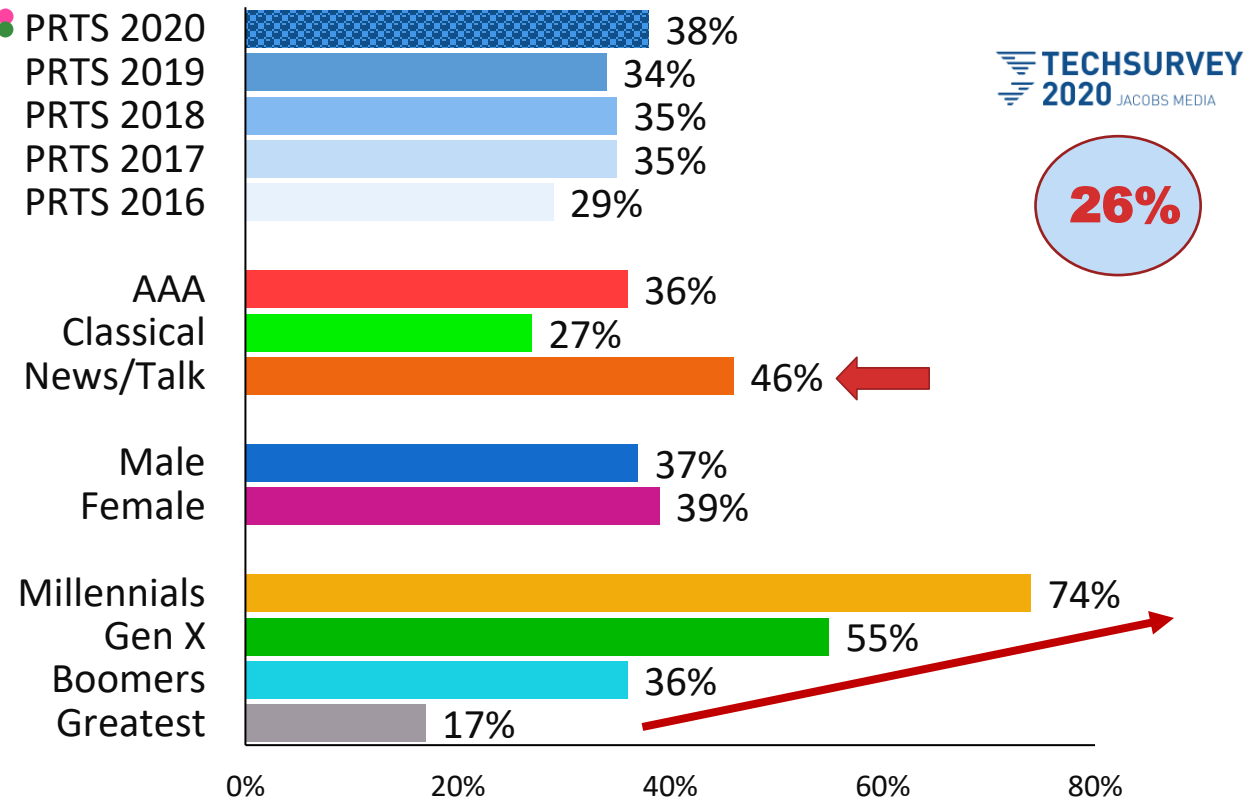


Podcasting and the On-Demand Experience

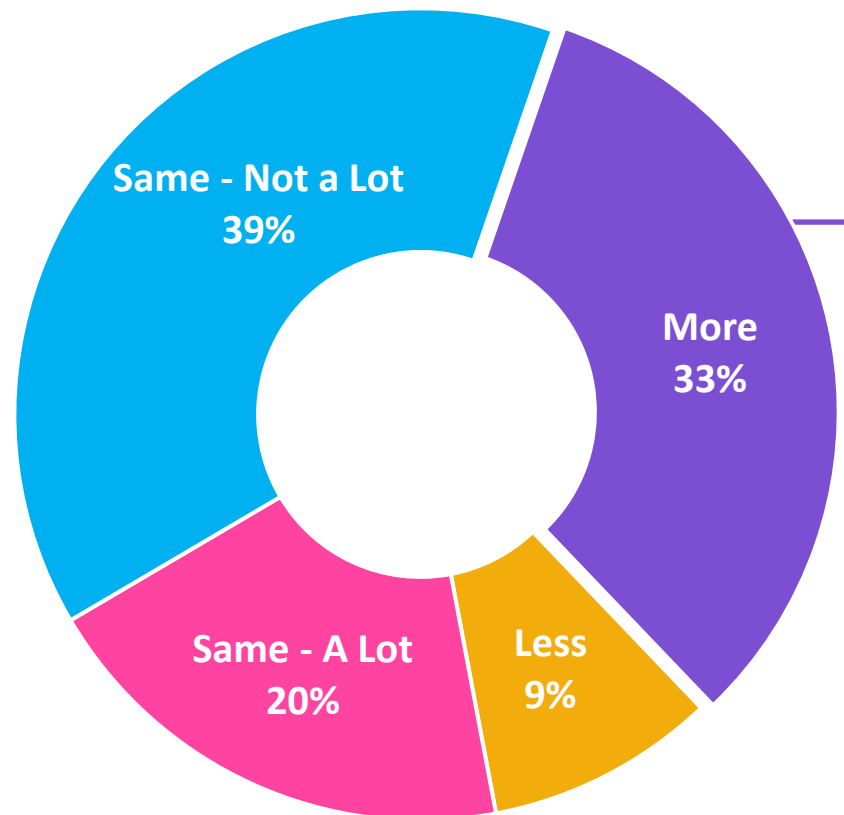
Podcasts Now Reach Nearly Four in Ten Weekly, Including Three in Four Millennials and Nearly Half of News/Talk Fans



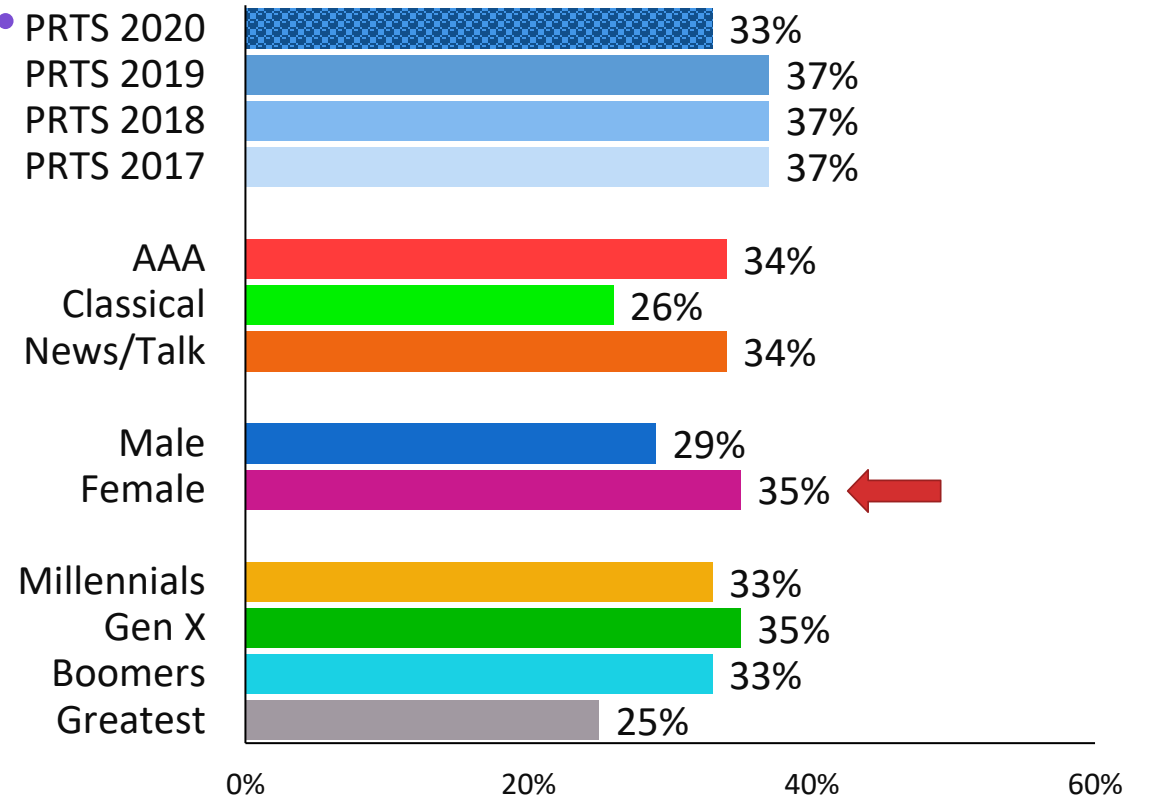
% Who Listen to Podcasts/On-Demand Audio Weekly or More



While Less Pronounced, Podcast Listening Momentum Continues Among Users, Among Women in Particular

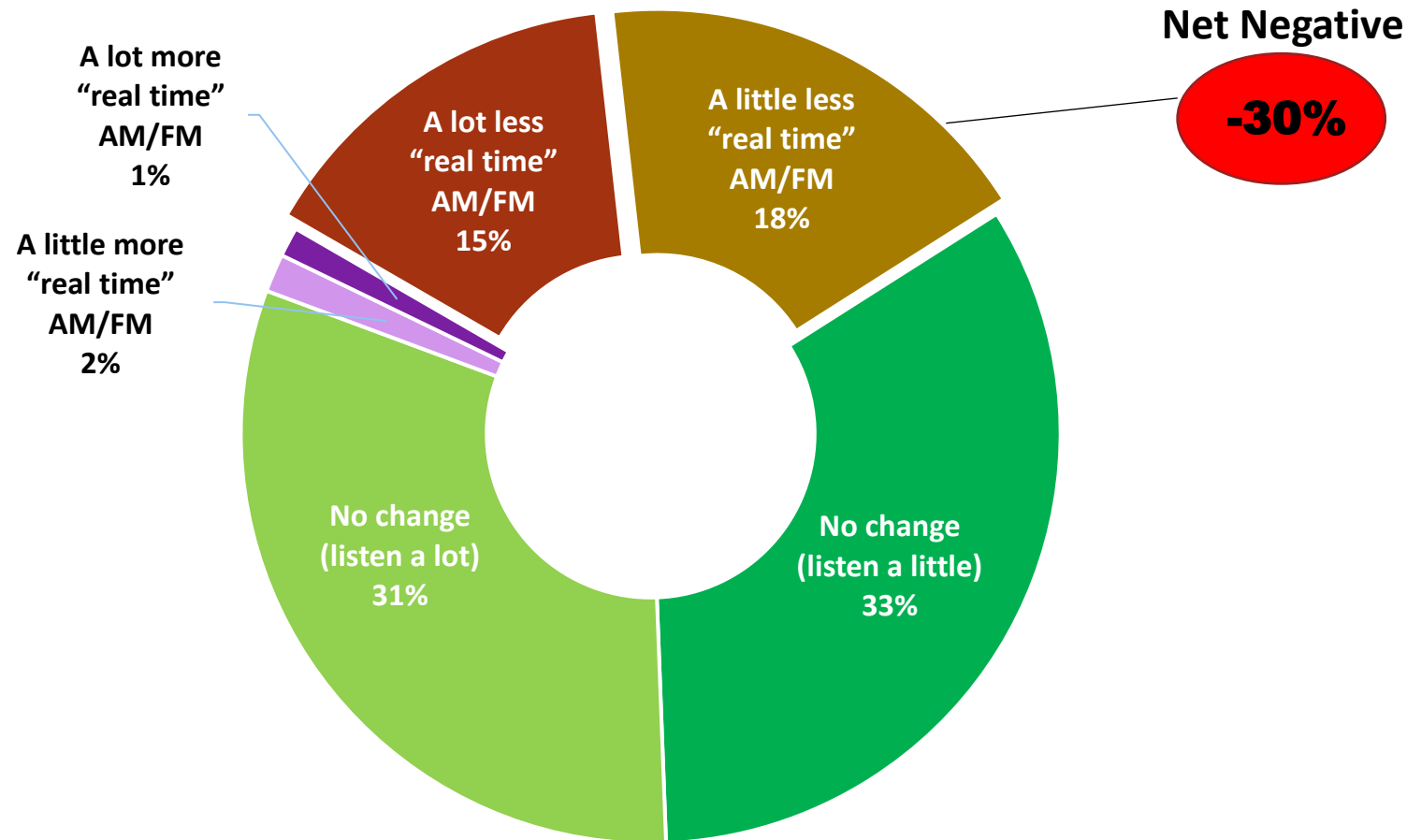


% of Monthly Podcast Listeners Who Say They Are Listening to Podcasts/On-Demand Audio More in the Past Year



One in Three Weekly Podcast Listeners Is Spending Less Time With “Real Time” AM/FM Radio Due to Podcasts

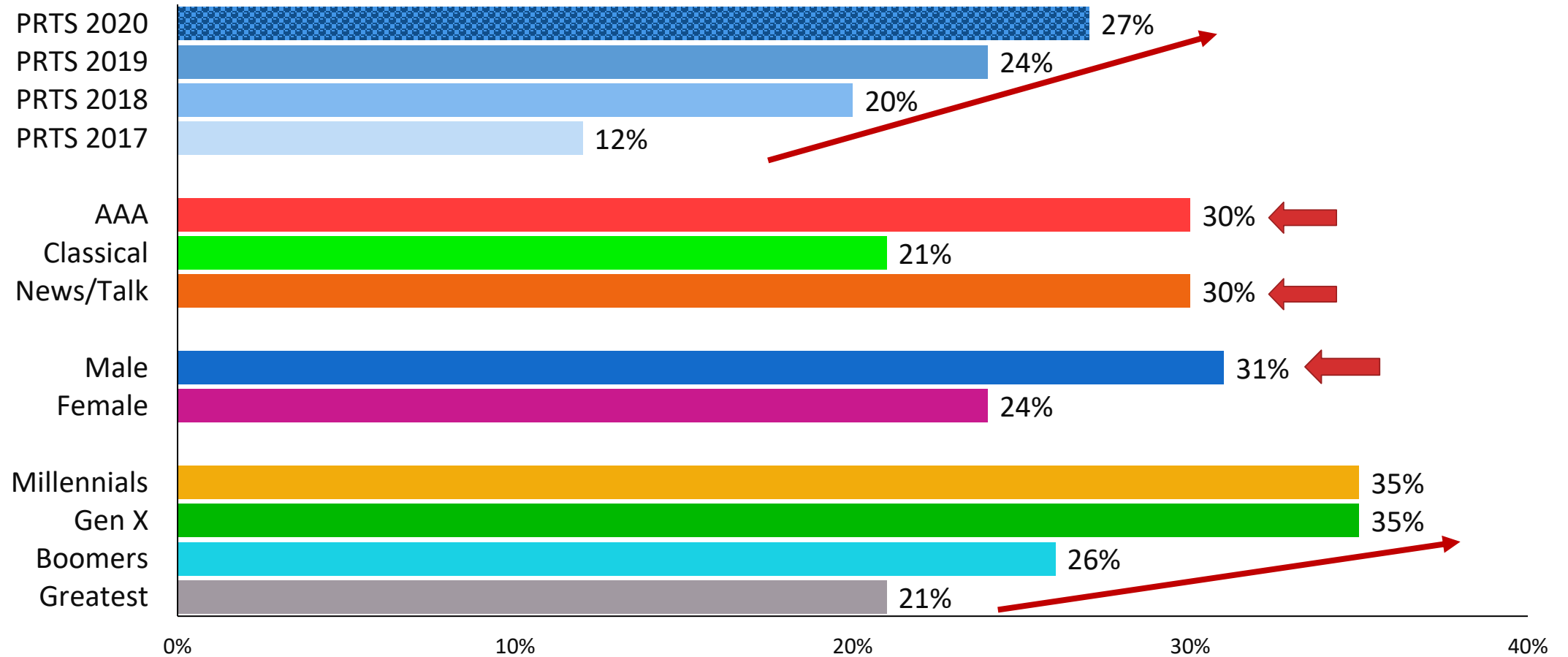
“As a result of listening to podcasts, how has it impacted your ‘real time’ AM/FM radio listening?”





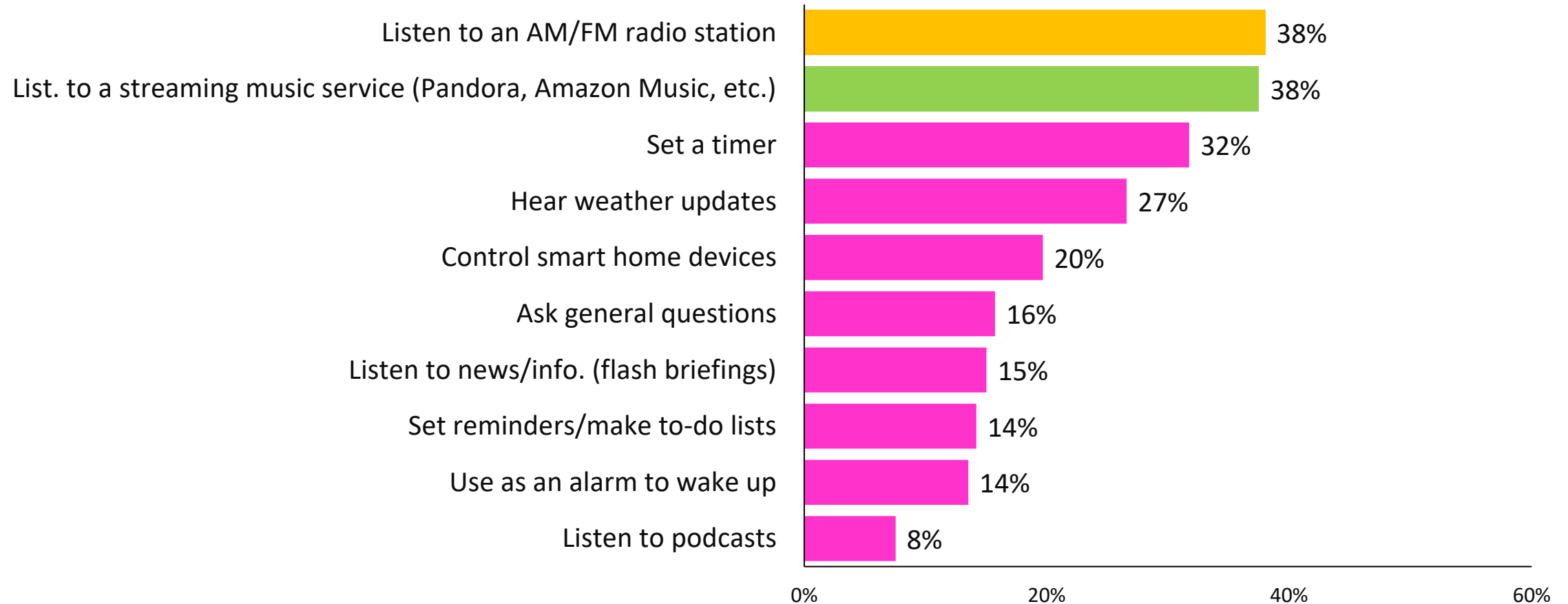
Smart Speakers & Voice

Smart Speaker Ownership Continues to Rise Especially Among Progressively Younger Generations



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

Listening to AM/FM Radio Stations and Streaming Music Services Are the Top Uses for Smart Speakers

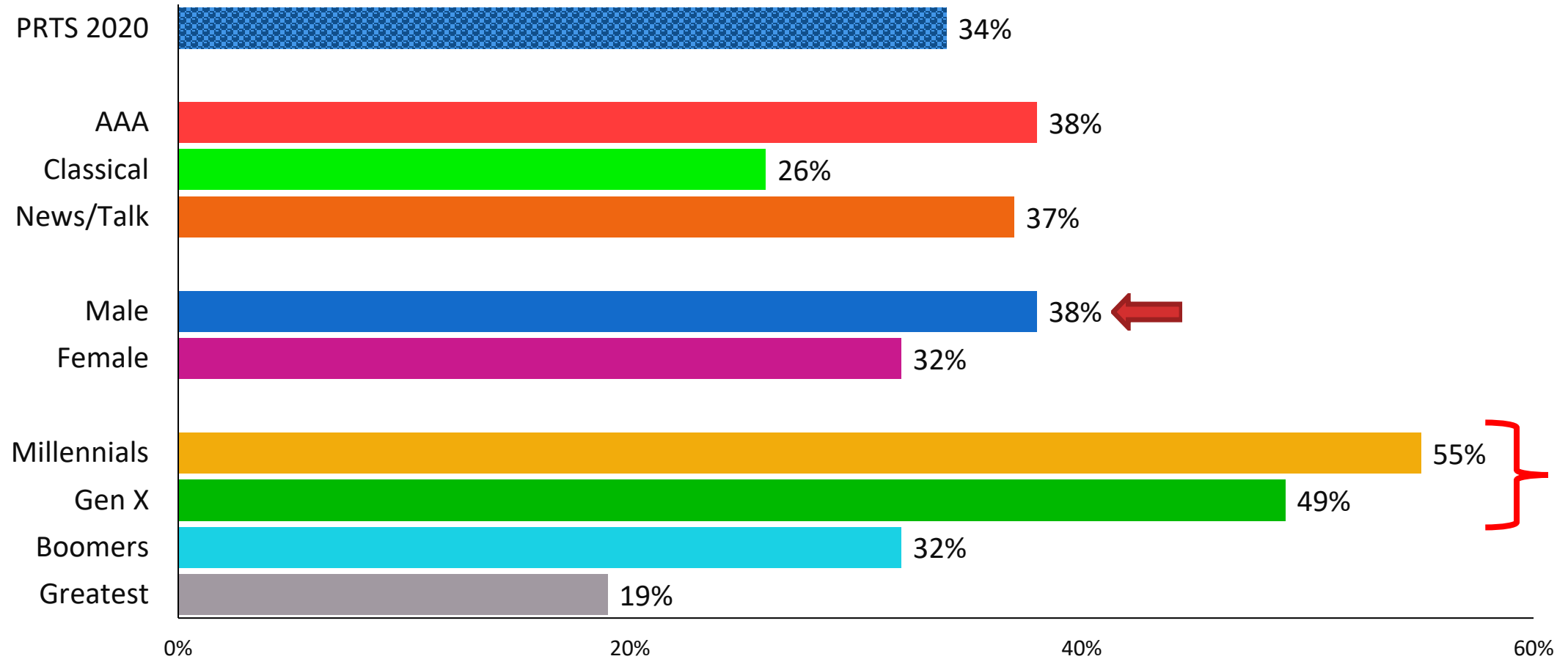


% of smart speaker owners who “frequently” use their device(s)
in each way (most mentioned uses; 8% or more)



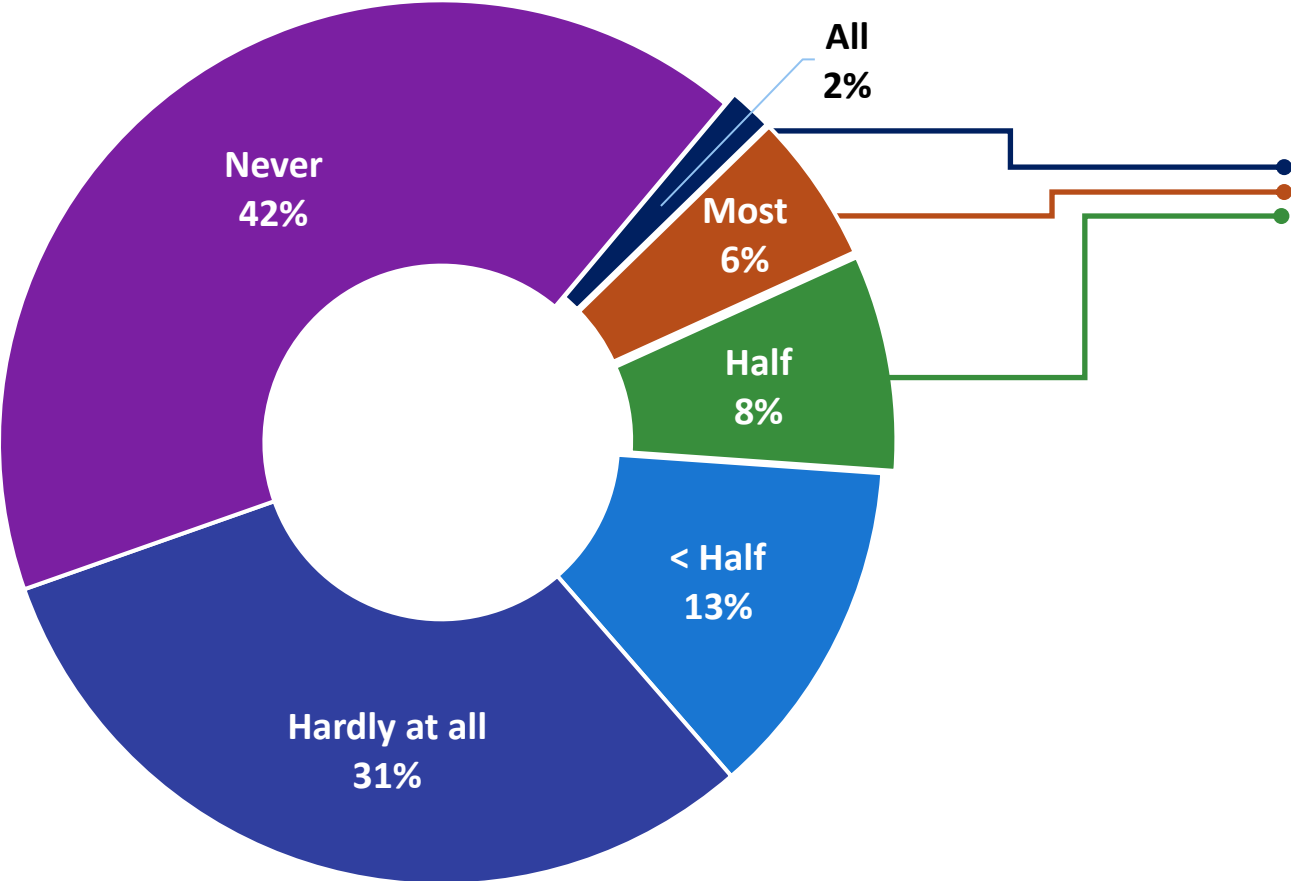
Headphones & “Hearables”

One in Three Own “Hearables,” Especially Men and Younger Generations

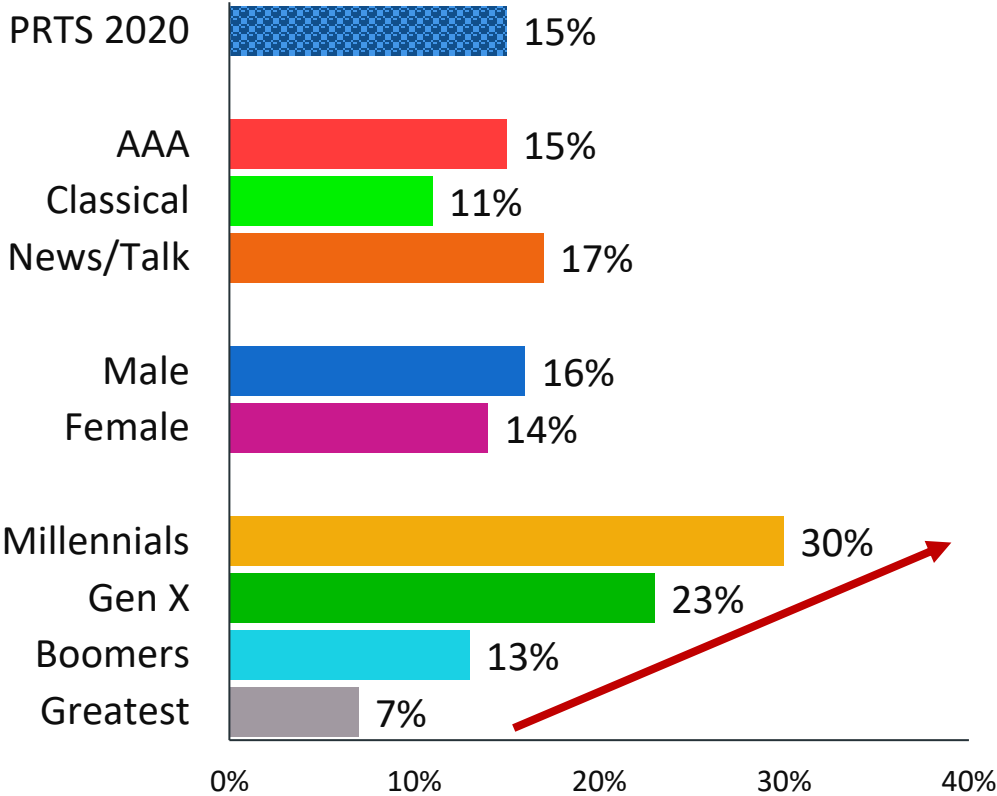


% who own wireless headphones/earbuds
(Apple AirPods, Echo Buds, Beats Wireless, etc.)

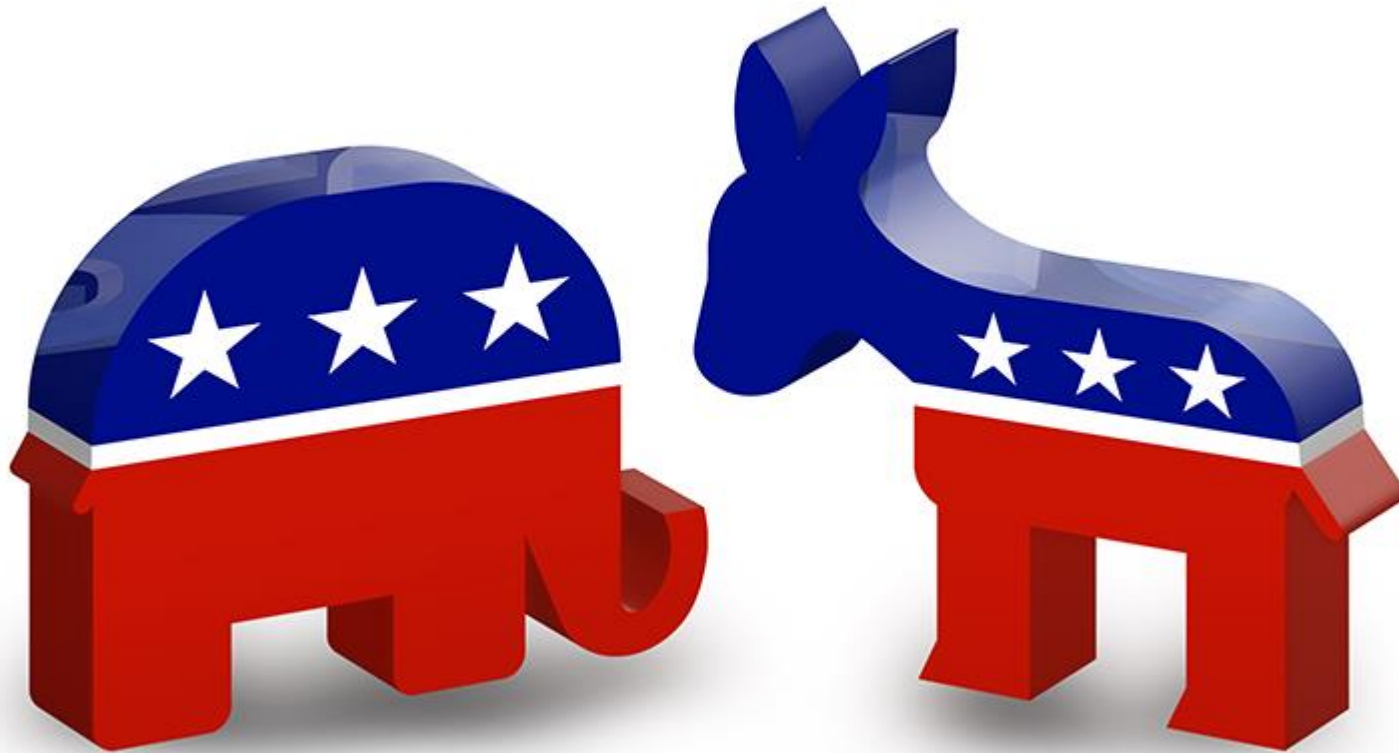
More than One in Seven Uses Headphones/Earbuds for AM/FM Radio Listening at Least Half the Time; Highest Among Younger Generations



% Saying At Least Half of AM/FM Radio Listening Is Using Headphones/Earbuds

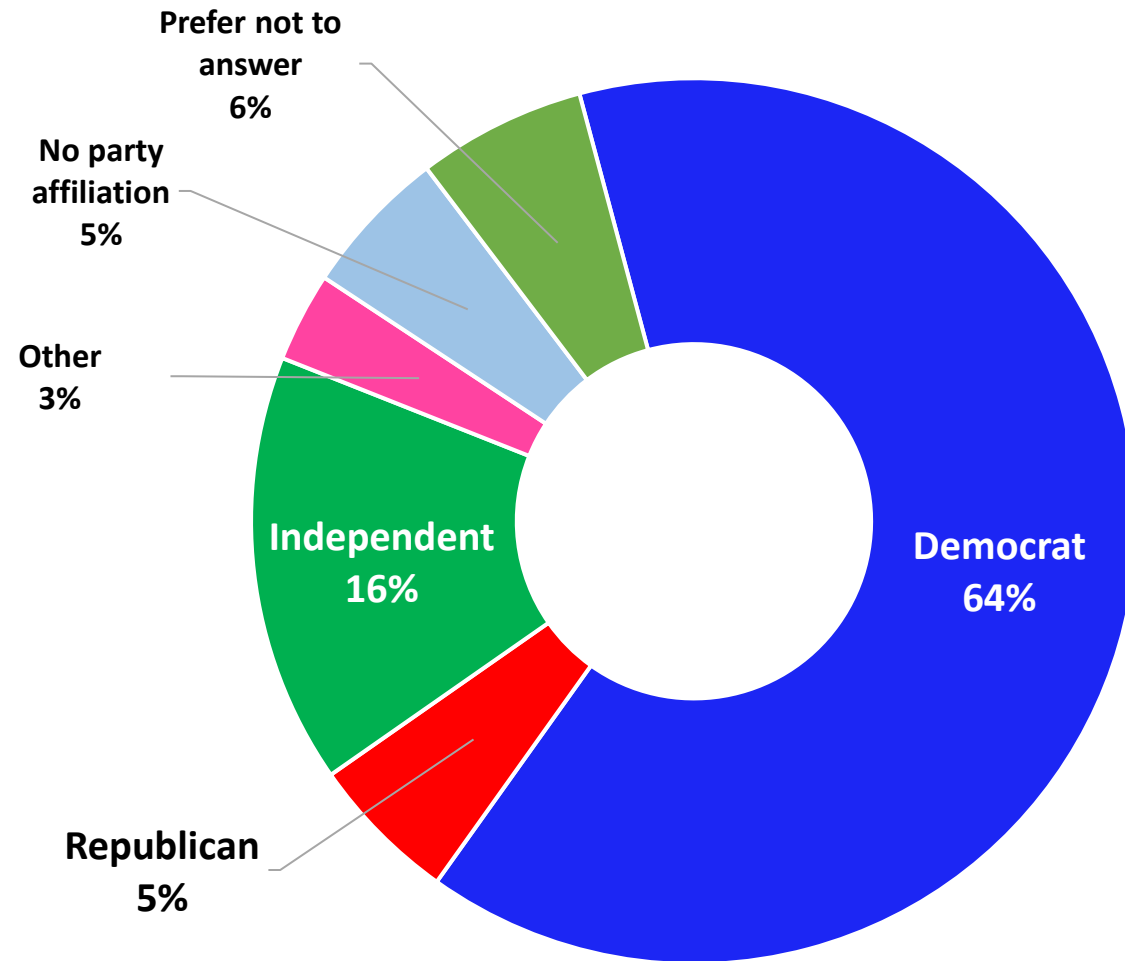


“Thinking about the time you spend listening to AM/FM Radio (on a regular radio, streaming, etc.), how often do you listen using headphones or earbuds (either wired or wireless)?”

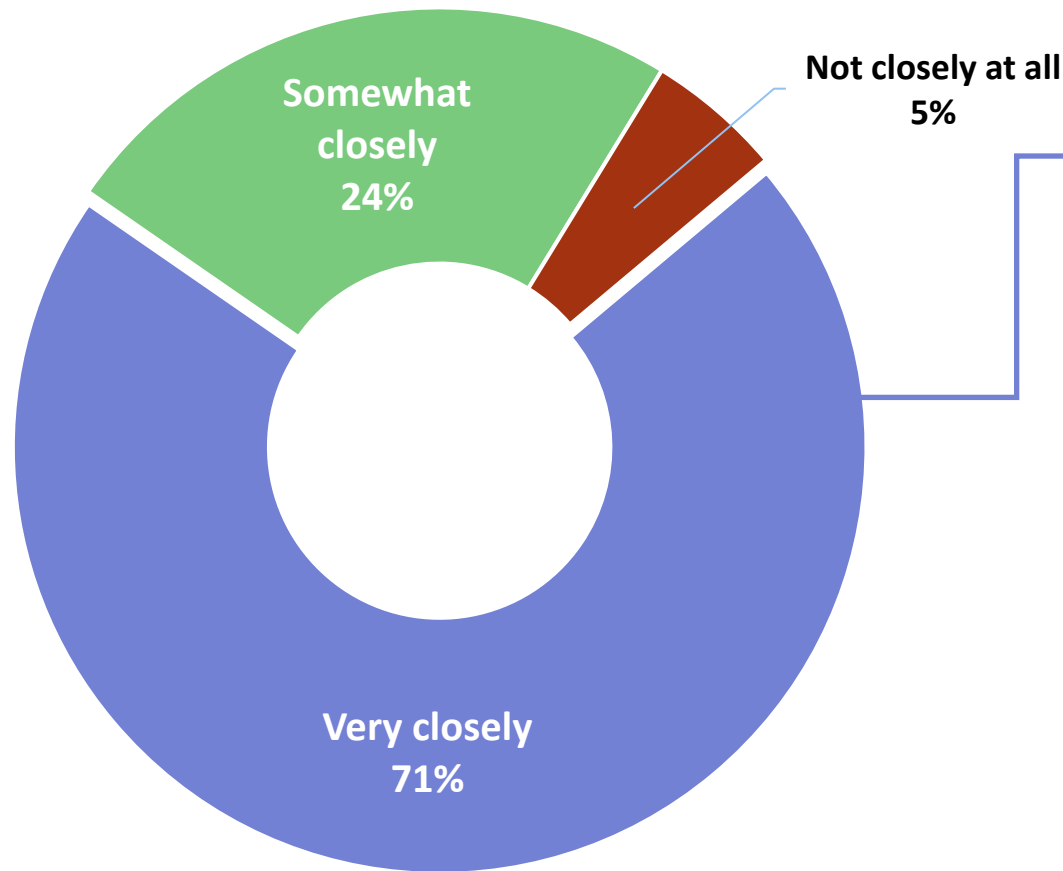


The Politics of Radio

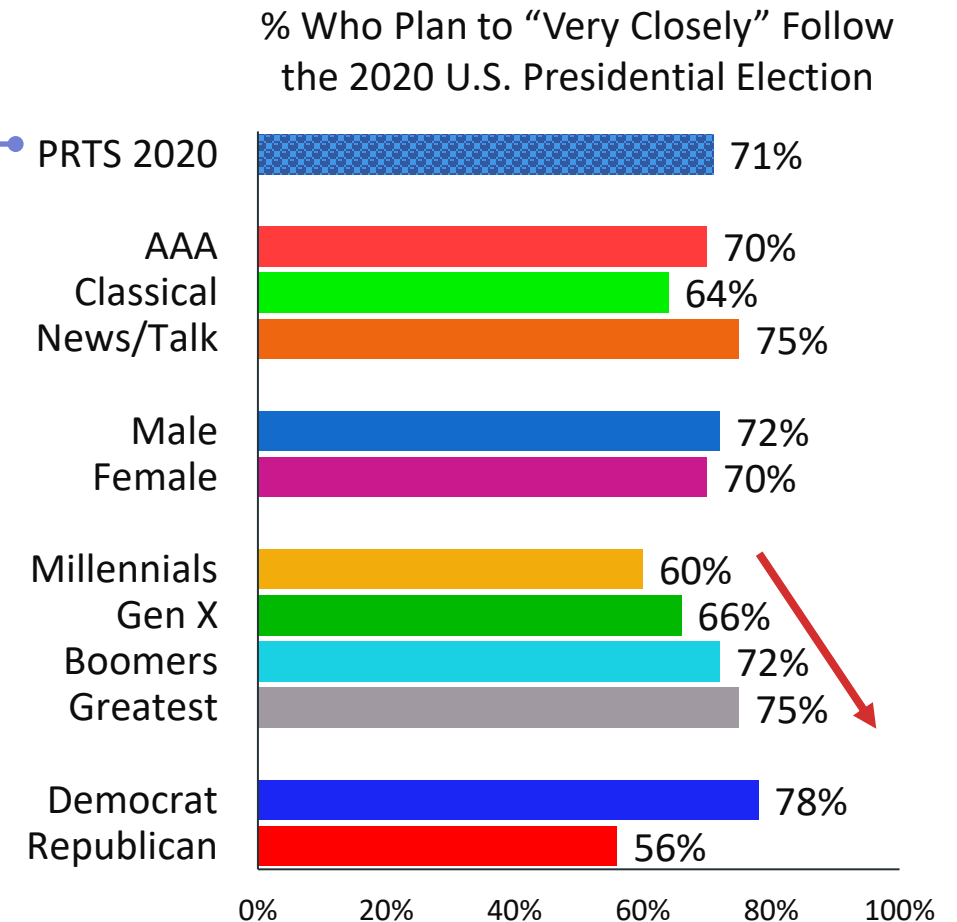
Political Party Preference



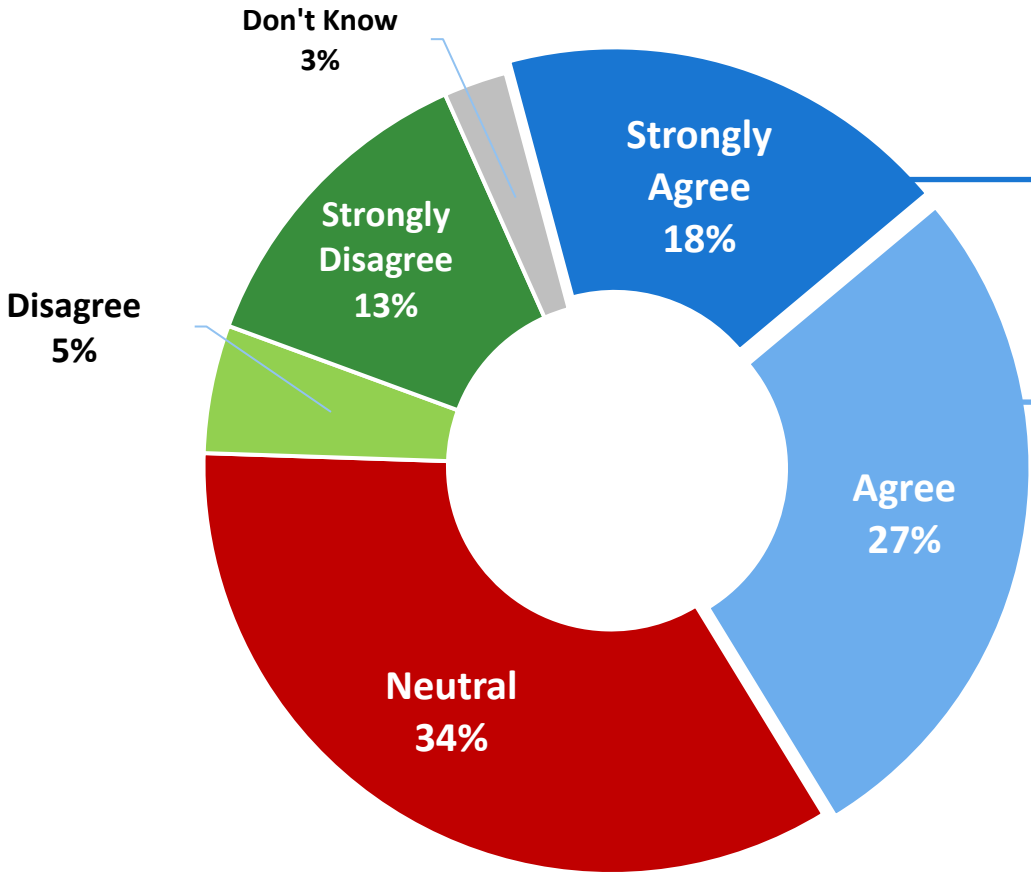
Seven in Ten Plan to Very Closely Follow the U.S. Presidential Election, Especially Progressively Older Generations and Dems



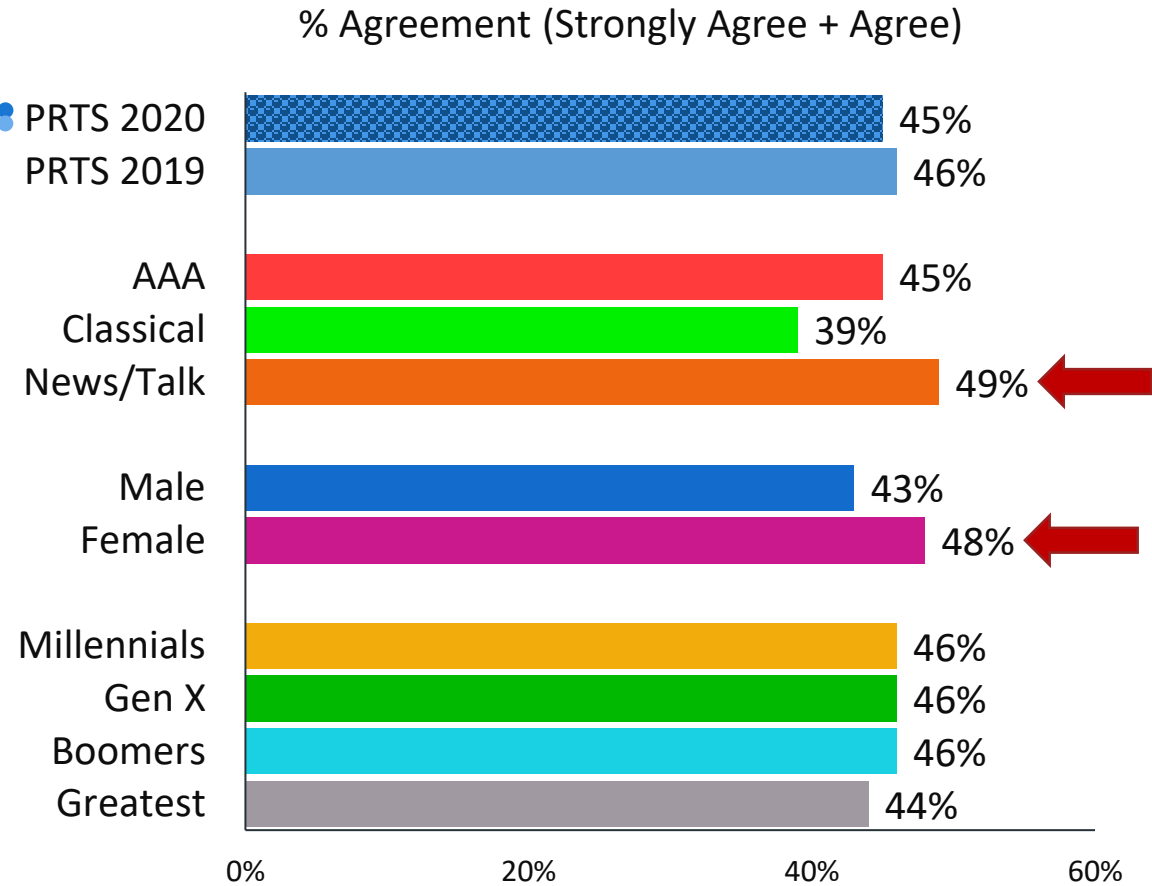
"How closely do you plan on following the 2020 U.S. Presidential Election coverage?"



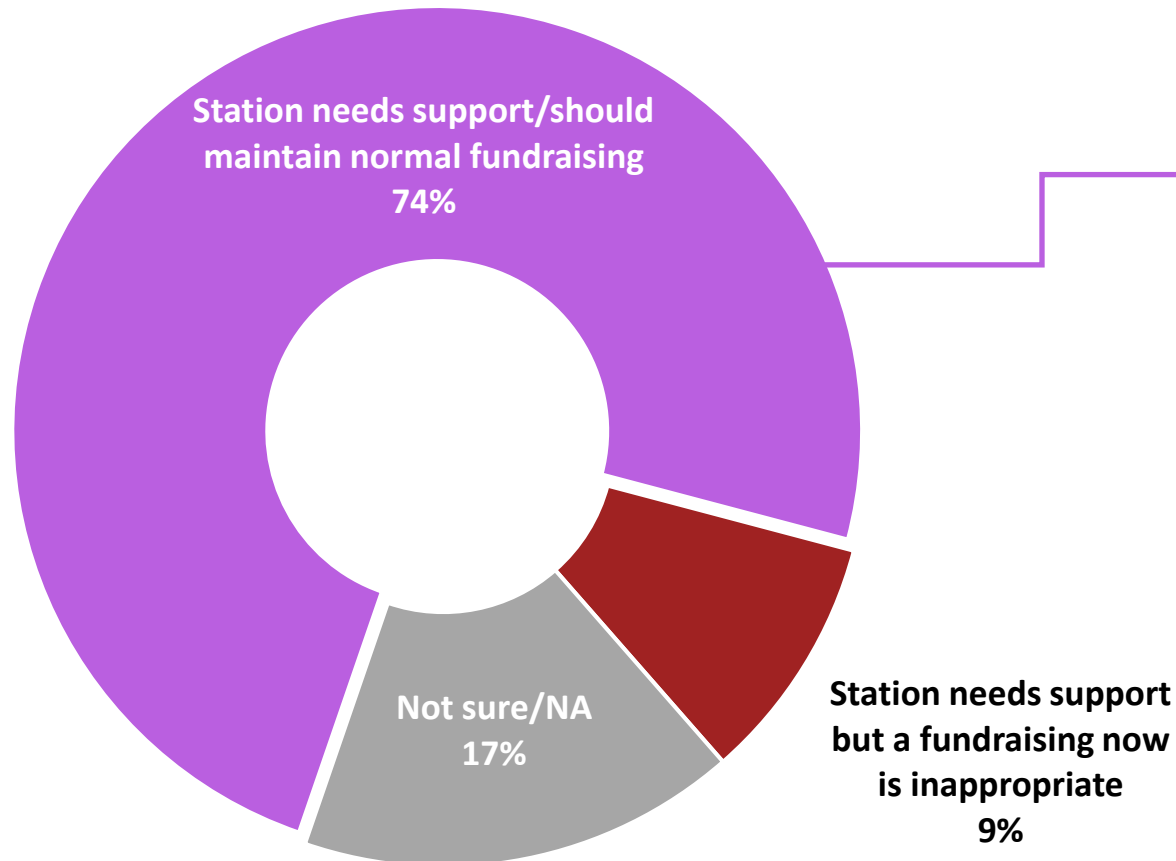
Politics Has Been a Catalyst for Increased Public Radio Support, With Women and News/Talk Fans Leading the Way



"As a result of the current political climate, I'm providing increased support to public radio"



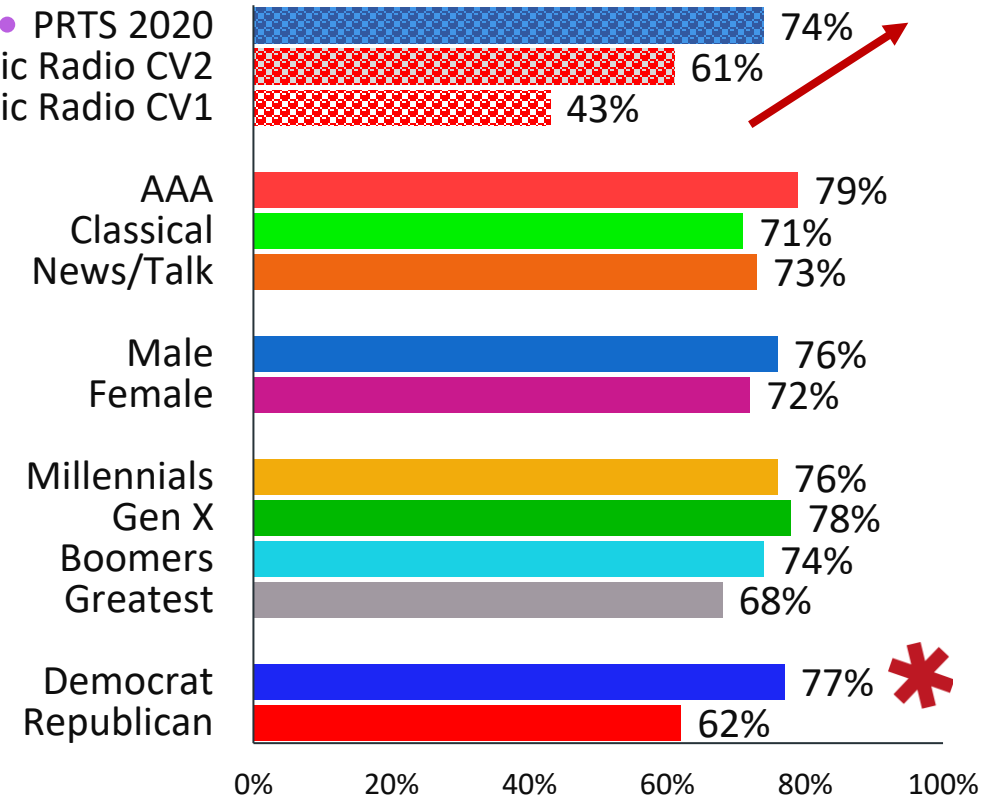
Most Agree Normal Fundraising Can and Should Continue at This Time

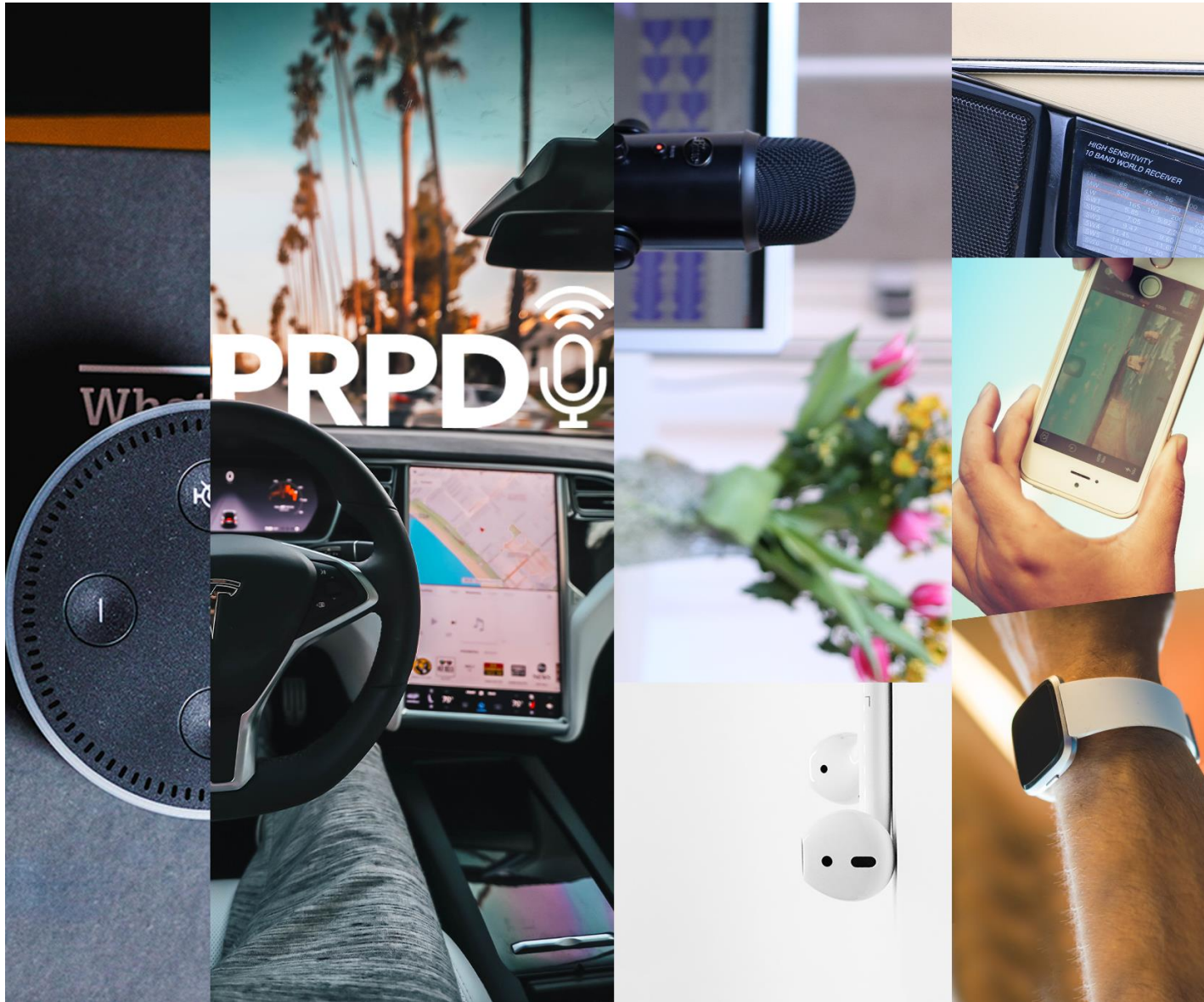


"Which of these statements best describes how THE STATION THAT SENT YOU THIS SURVEY should raise funds during the COVID-19 outbreak?"

PRTS 2020
Public Radio CV2
Public Radio CV1

% Saying Their Home Station Should Maintain Normal Fundraising Activities





 **TECHSURVEY**
2020 PUBLIC RADIO
JACOBS MEDIA

Public Radio in a Global Pandemic