

Jacobs
media strategies

PRPD

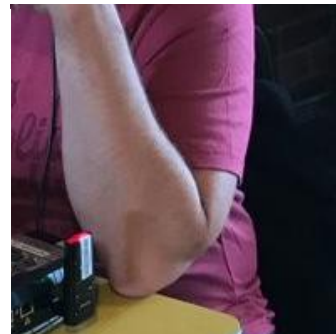
TECHSURVEY
2021 PUBLIC RADIO
JACOBS MEDIA

Public Radio in the COVID Era

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#PRTS2021



Key Takeaways

- The COVID recovery is underway, but some key conditions (in-car, WFH) are still in play, while newer habits (audio/video streaming) are becoming frequent and consistent.
- Public Radio's "core values" are intact, but all signs point to a "down" news cycle.
- Secondary listening platforms are rising in importance, especially streaming, apps, and smart speakers.
- Alternative news sources – daily news podcasts, newsletters – are becoming more important.
- A generational strategy is of paramount importance for most Public Radio stations.
- Podcasting continues to grow in popularity, especially among younger generations.
- In-car listening has rebounded some, but still below pre-COVID levels.
- The "subscription economy" is real. Can Public Radio cash in?
- Online gatherings are a frequent place to meet. How can Public Radio use this highly popular technology?

Methodology

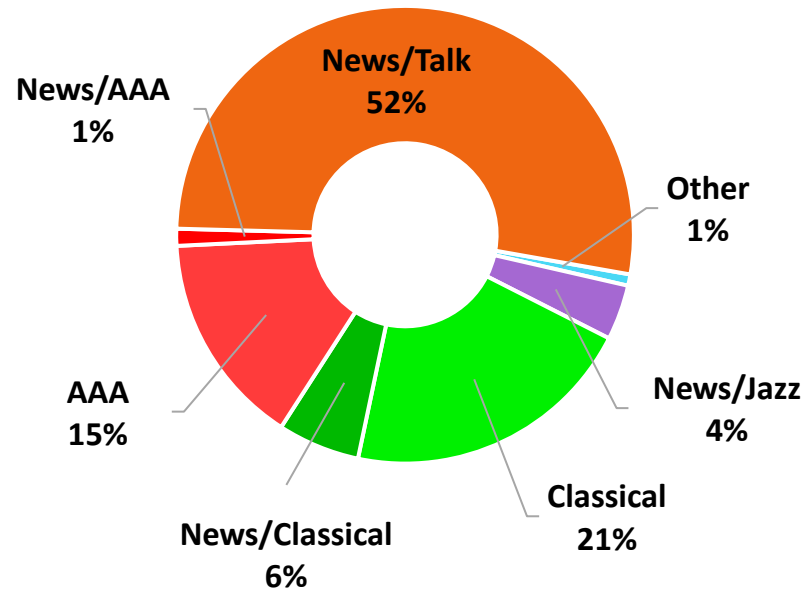
- 56 U.S. Public Radio stations
- N = 22,858
- Interview dates: June 25-July 25, 2021
- Most respondents are members of station databases. Some responses were gathered via station websites and/or social media pages.
- All responses were collected online and weighted using Nielsen 2020 market population 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 core users.



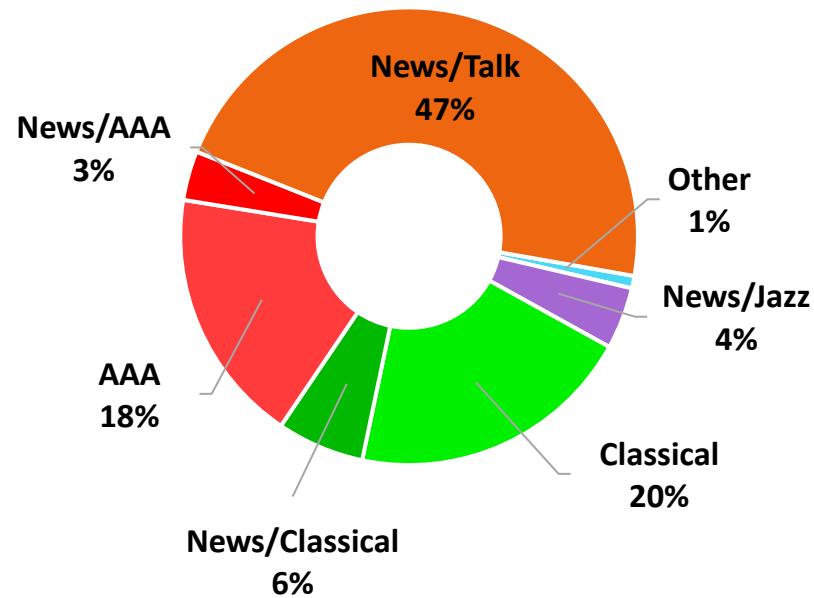
The Sample

Format Composition

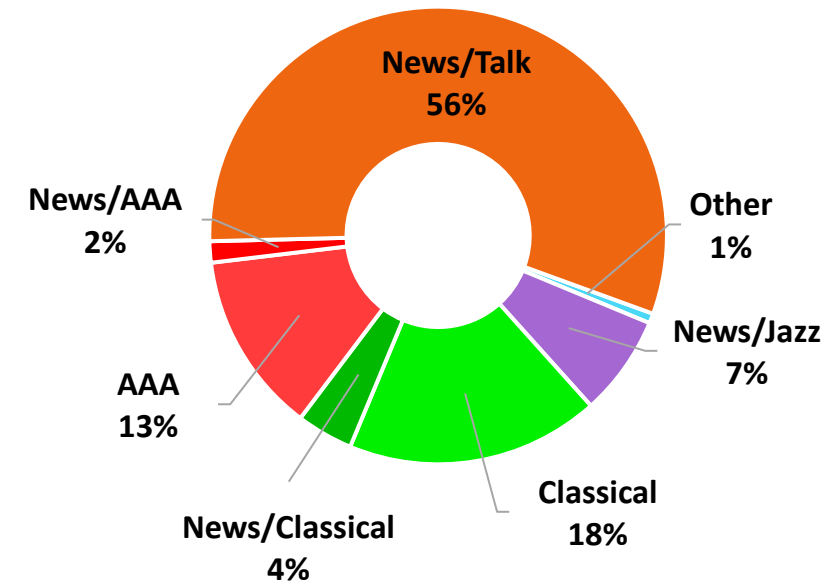
PRTS 2019



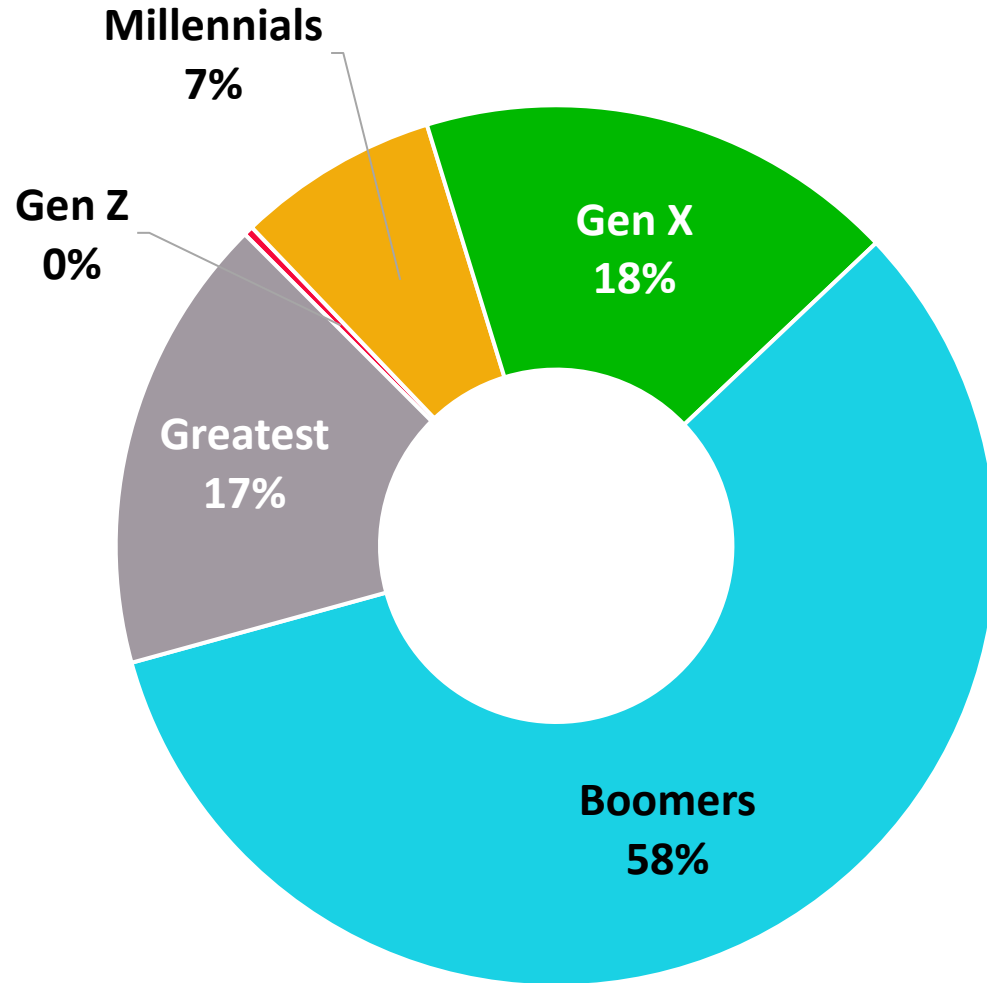
PRTS 2020



PRTS 2021



Generations



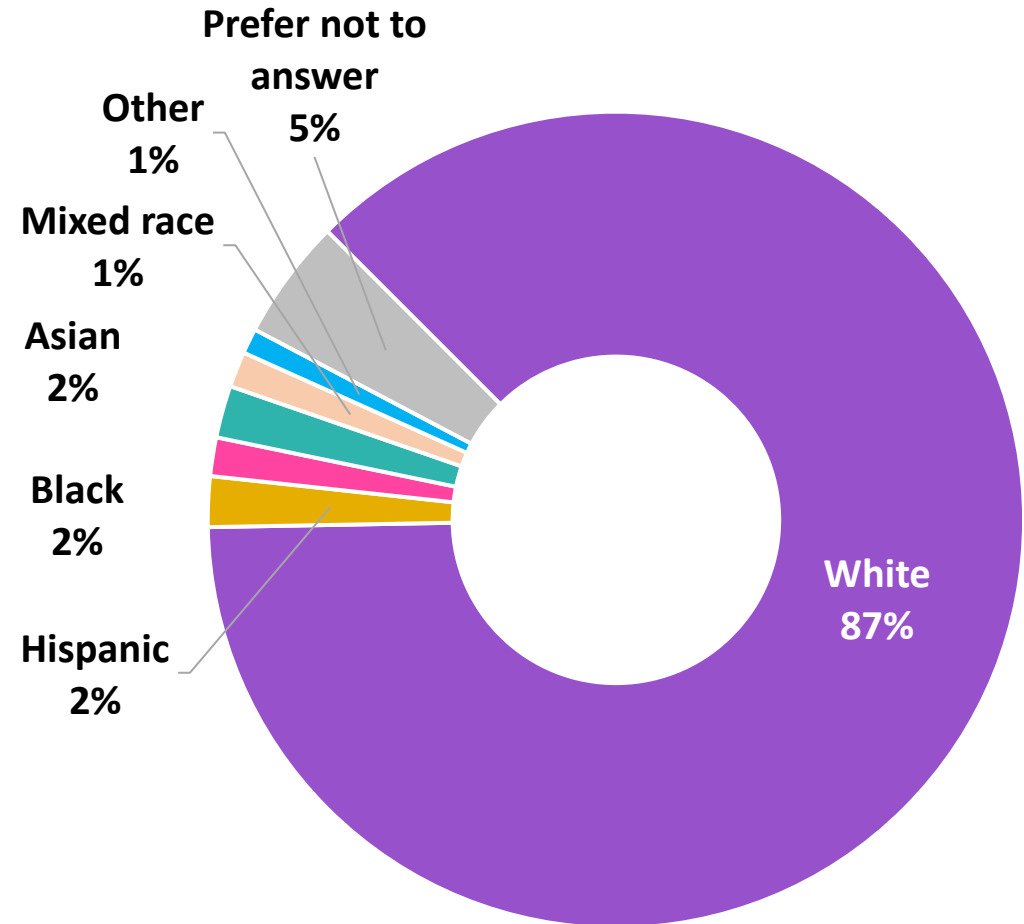
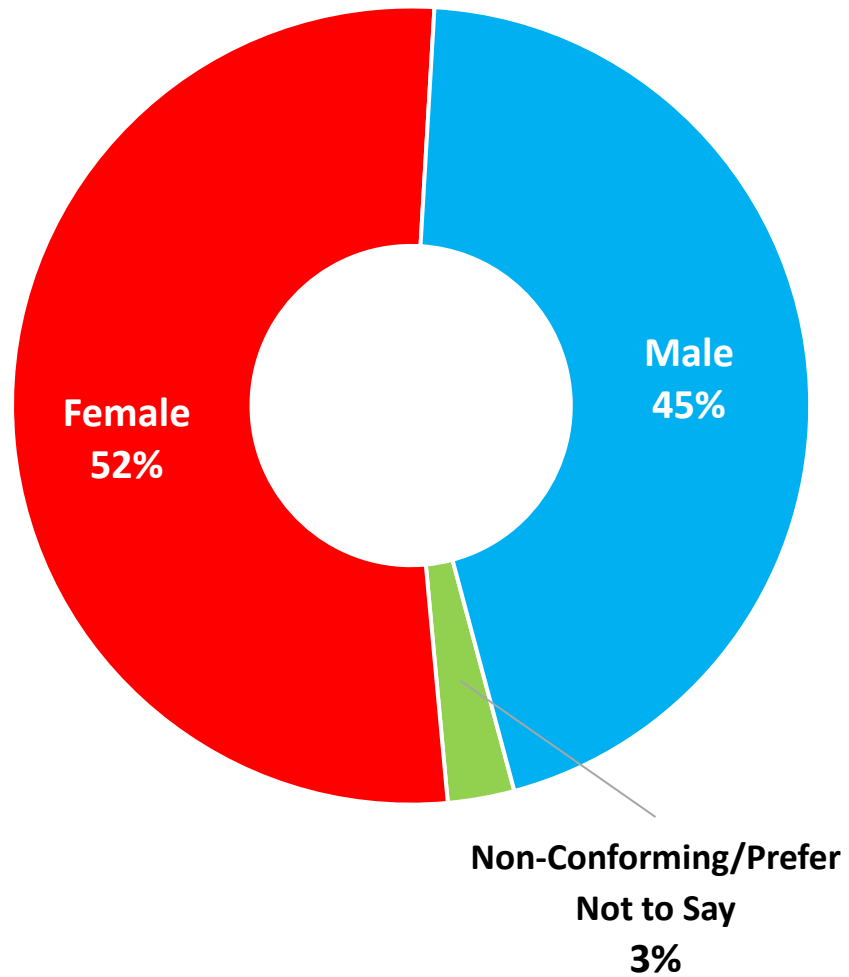
Millennials (born between 1981-1996)

Gen X (born between 1965-1980)

Baby Boomer (born between 1946-64)

Greatest Generation (born before 1946)

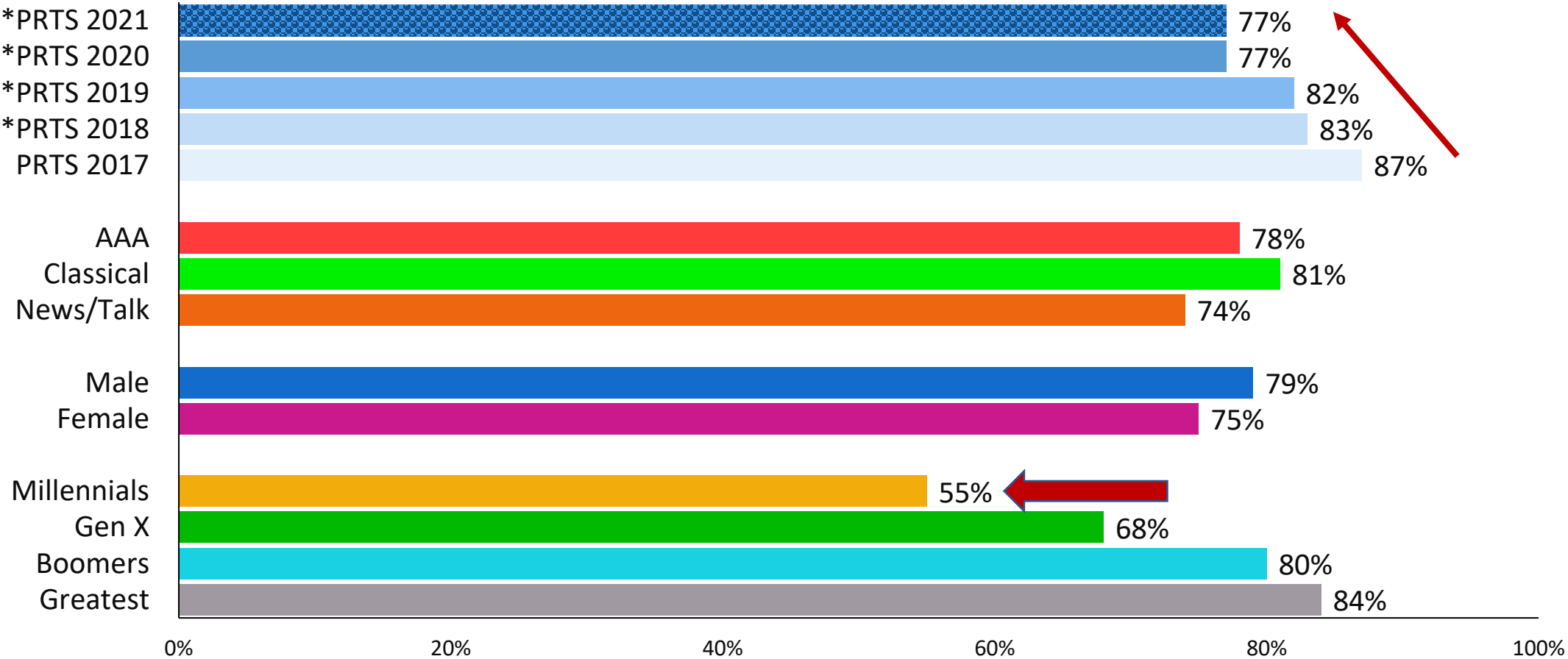
Gender and Ethnicity





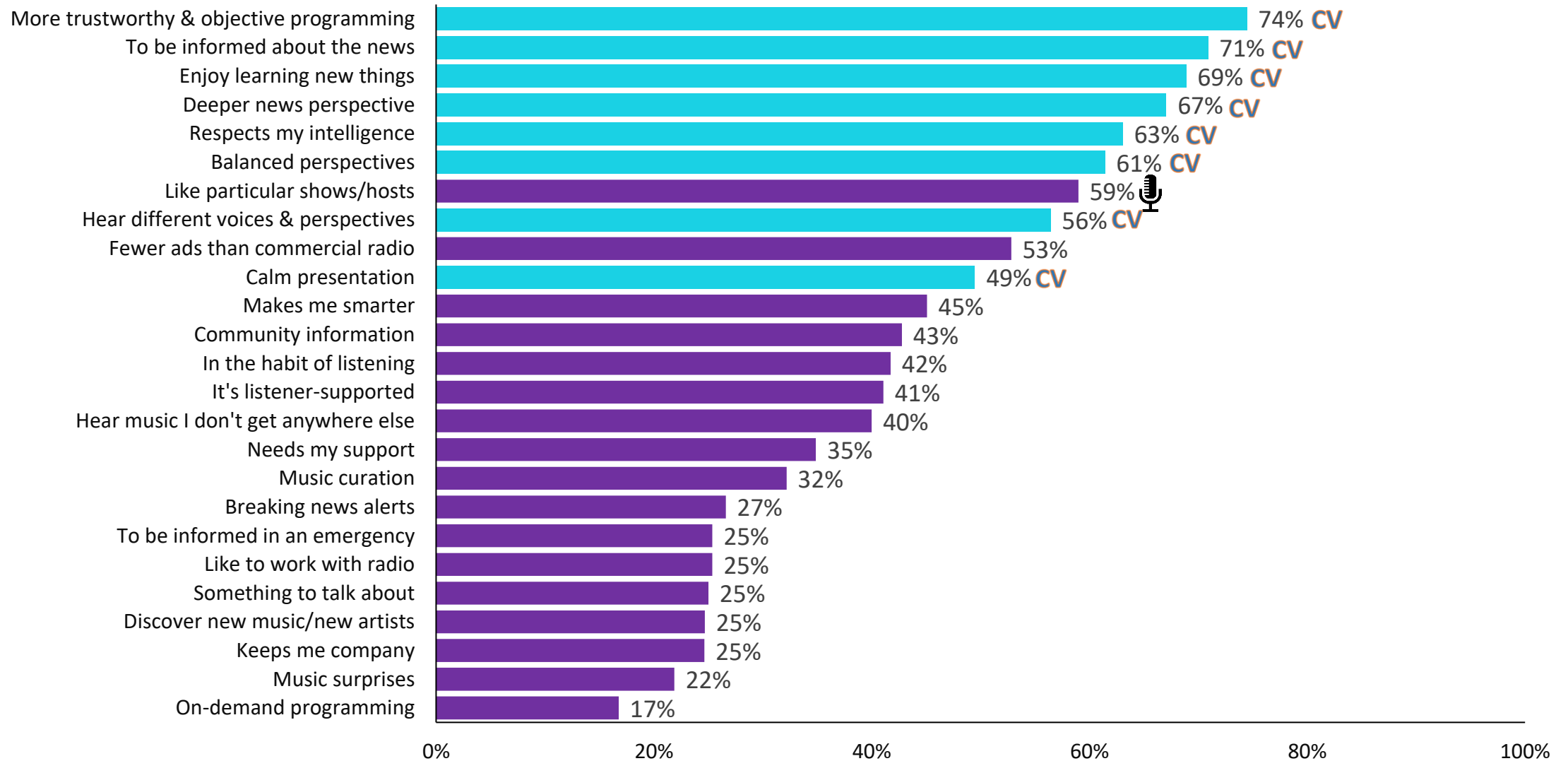
The presence of radios in homes ties last year's all-time low. Meanwhile, Public Radio core values are holding strong.

Fewer Than Eight in Ten Have a Regular Radio Where They Live; Millennials Are Least Apt to Have a Radio at Home

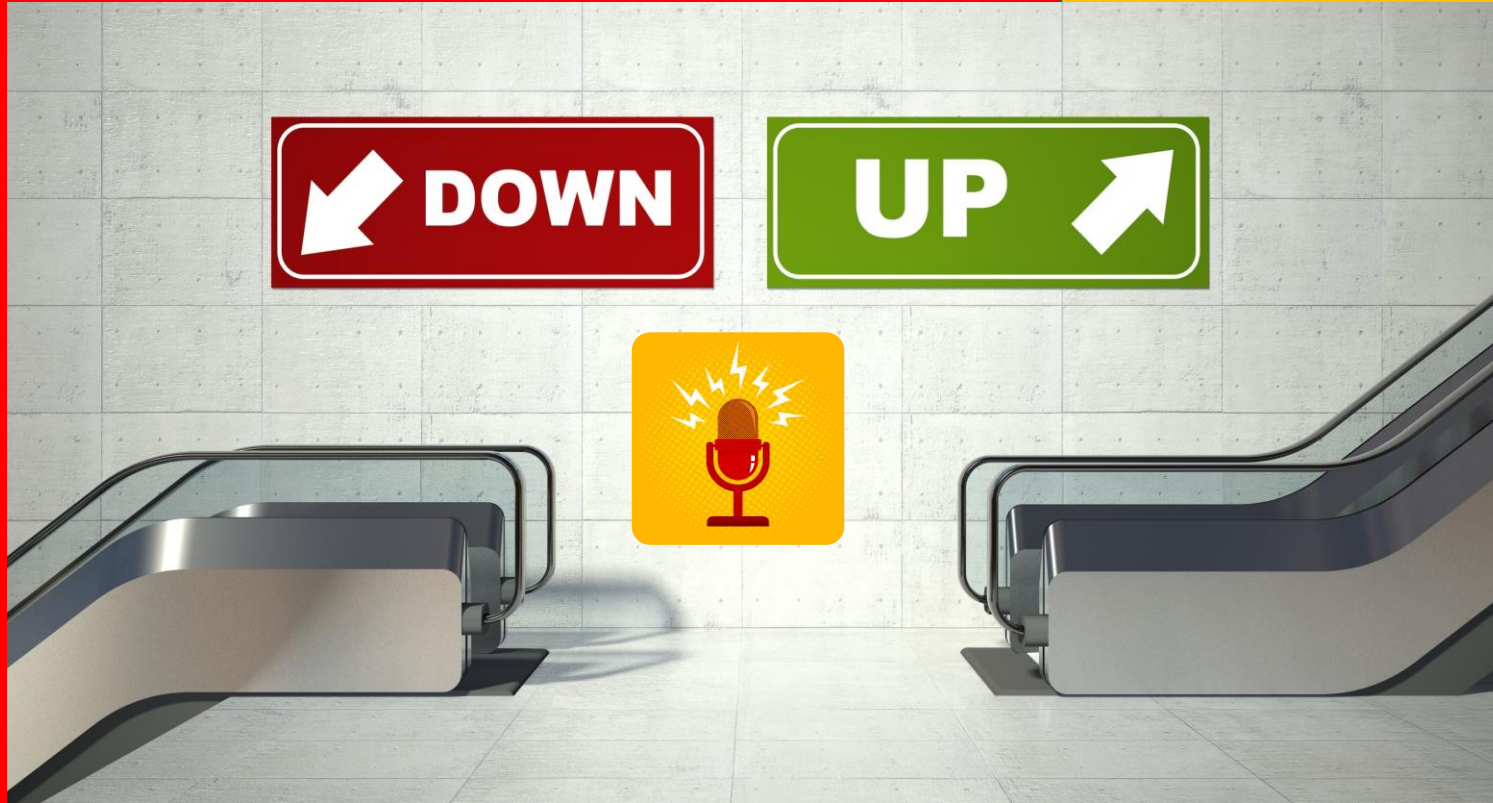


% with a regular radio in working condition where they live that they use*
*added wording: "...that you use?"

Public Radio's Core Values are Alive and Well

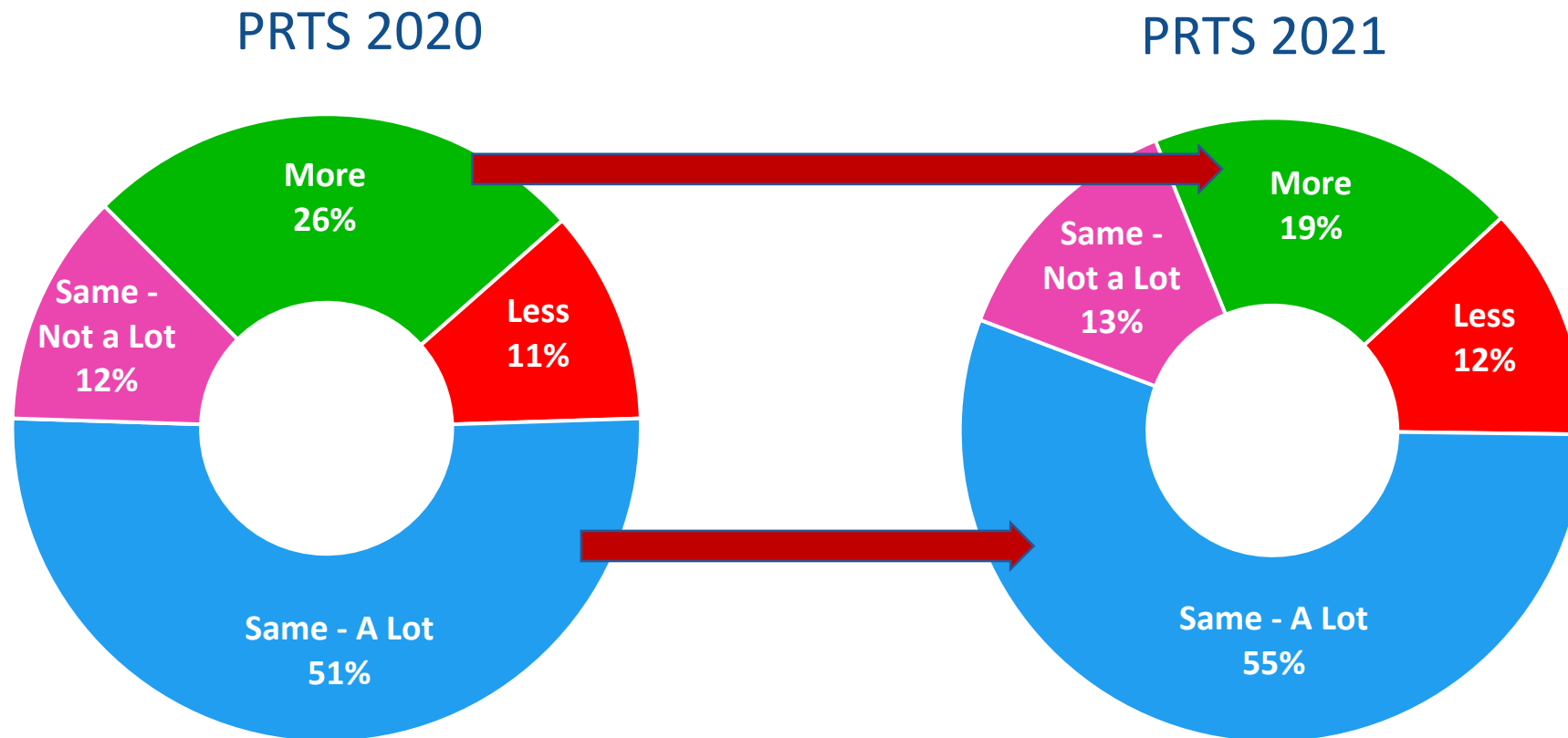


Among those who listen to AM/FM radio, % who say
this is a main reason they listen to Public Radio

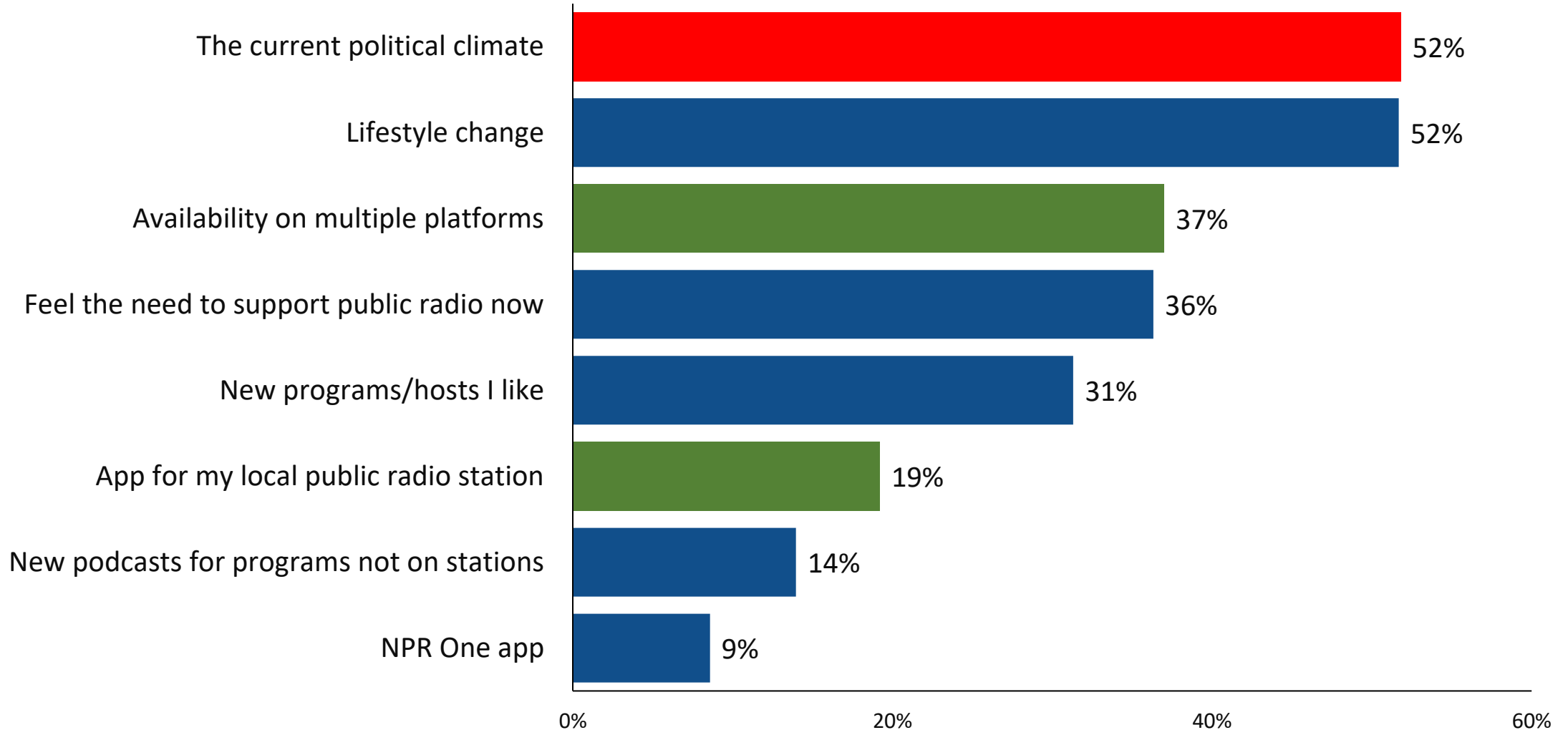


**COVID is still
a disruptive
force on
Public Radio's
listening
momentum.**

Public Radio Listening Momentum Has Shifted Since 2020's COVID Summer and Election Year

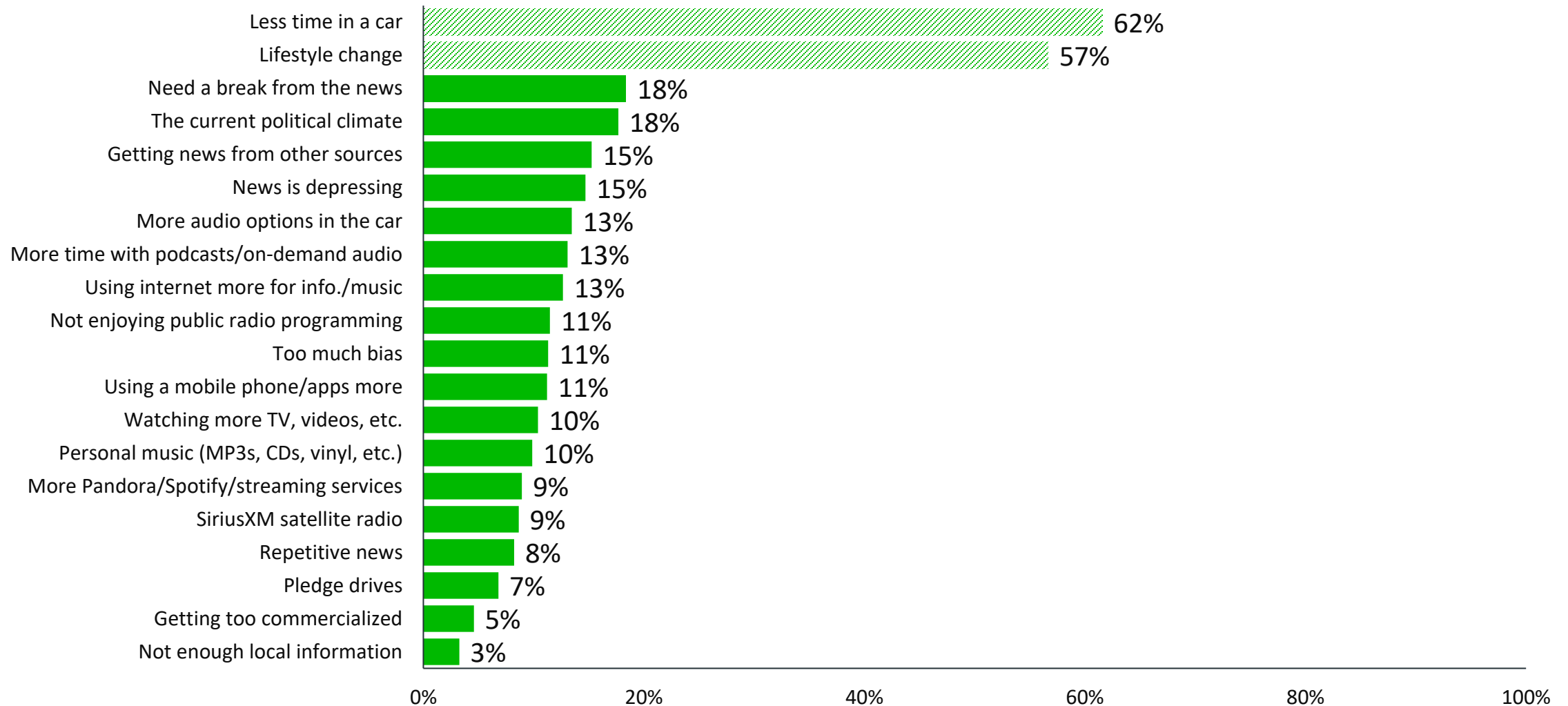


Main Reasons For Listening to Public Radio More



Among the 19% 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

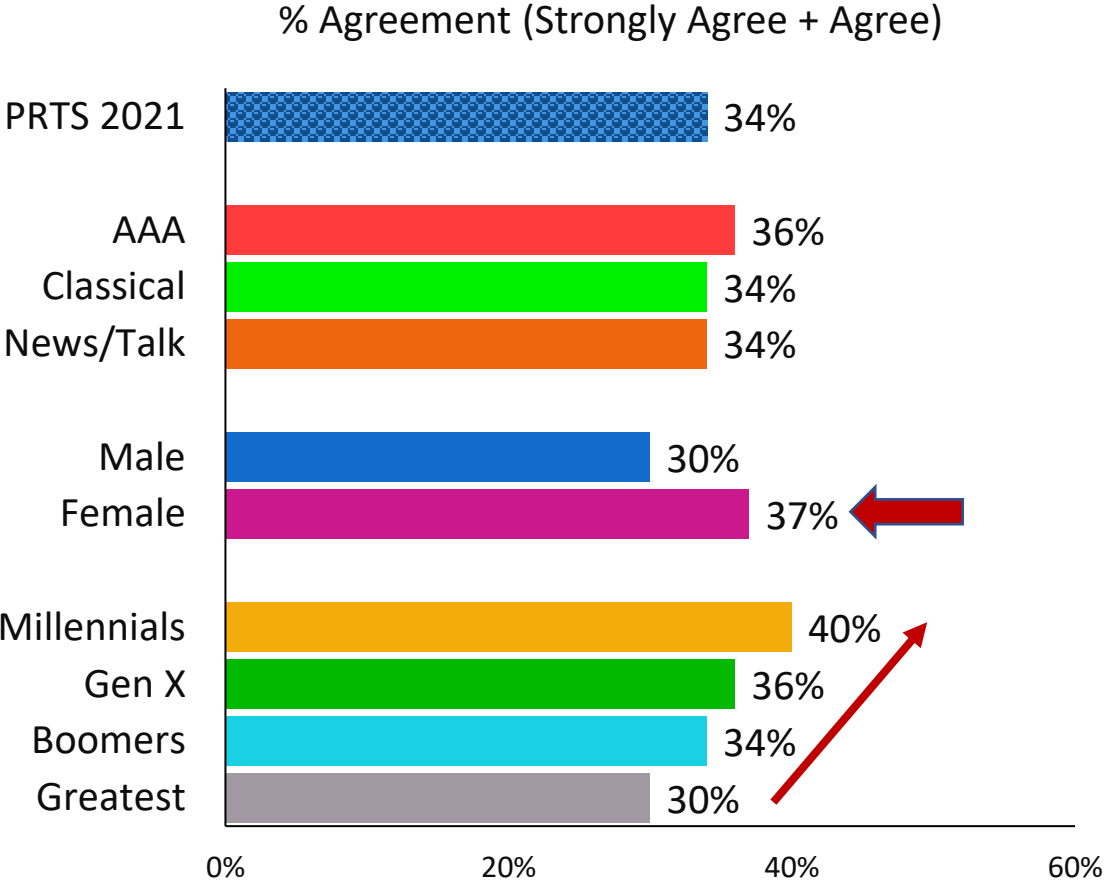
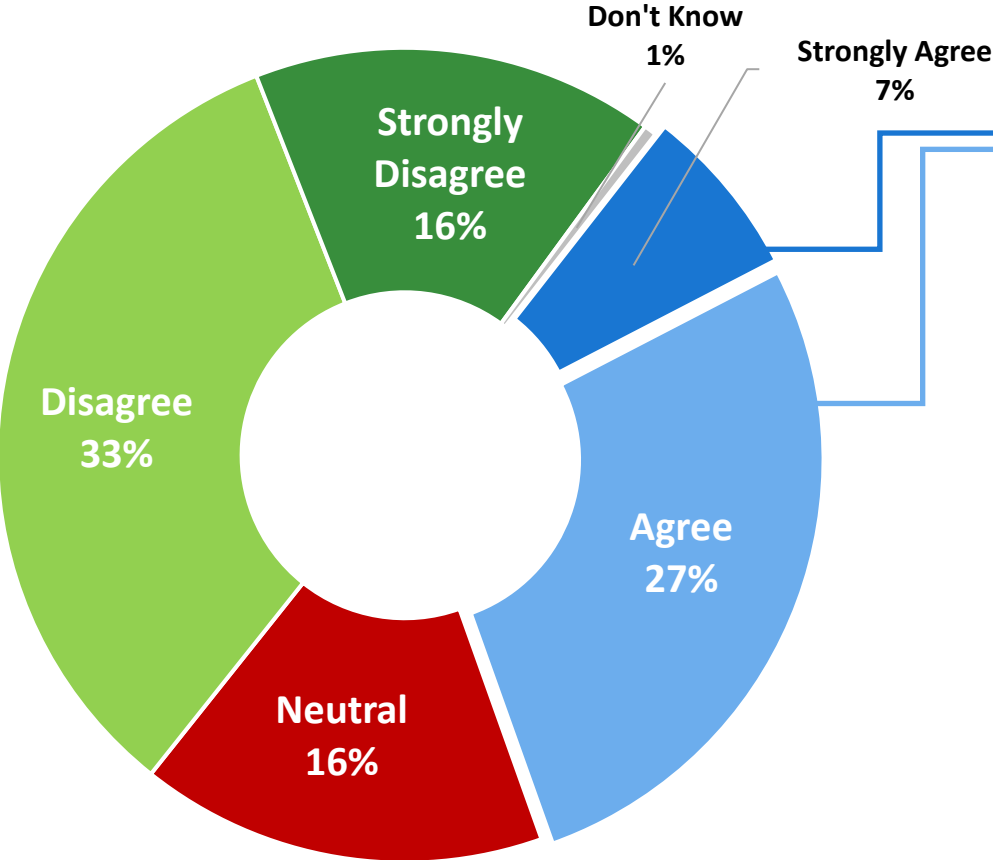


Among the 12% who say they are listening to Public Radio less in the past year,
% who say this is a main reason they listen less



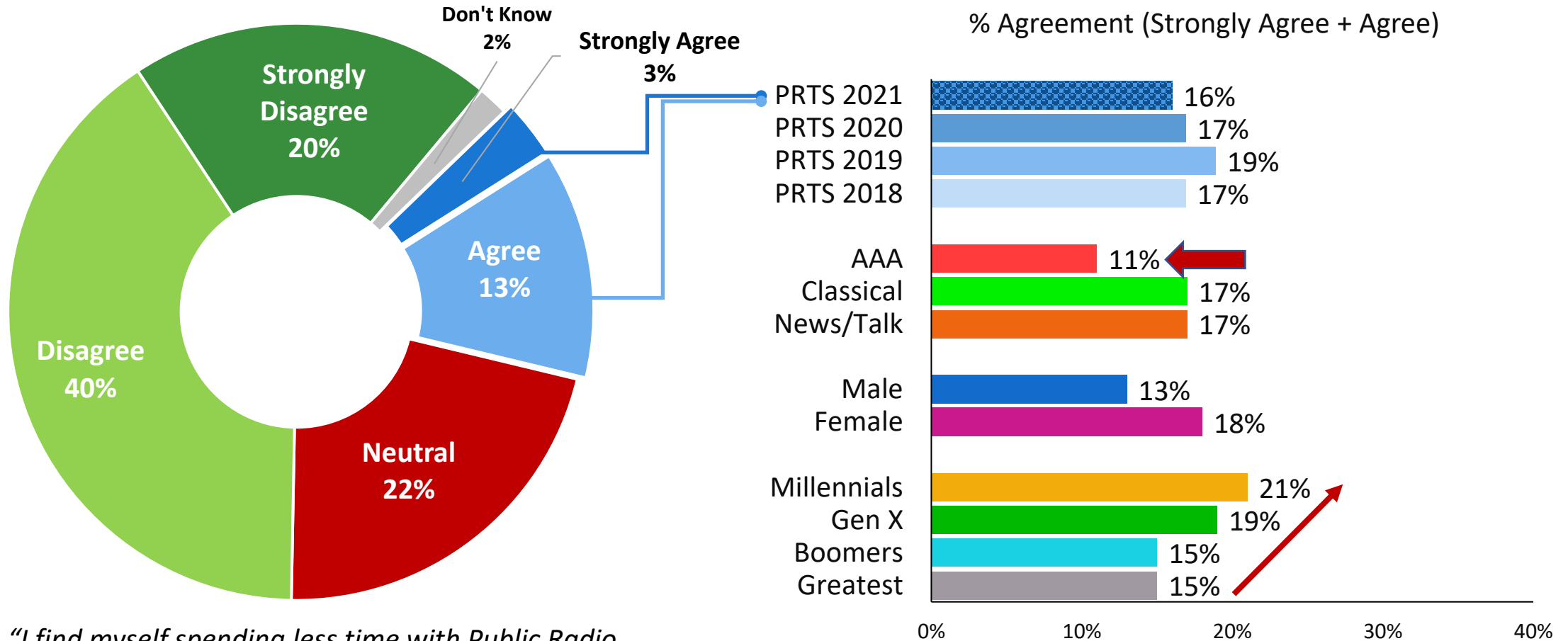
**The news cycle
has softened
post-Trump,
and appears to
be less cume-
urgent.**

One in Three Says They Are Following the News Less Closely Now Since the 2020 Election, Led By Women and Progressively Younger Listeners



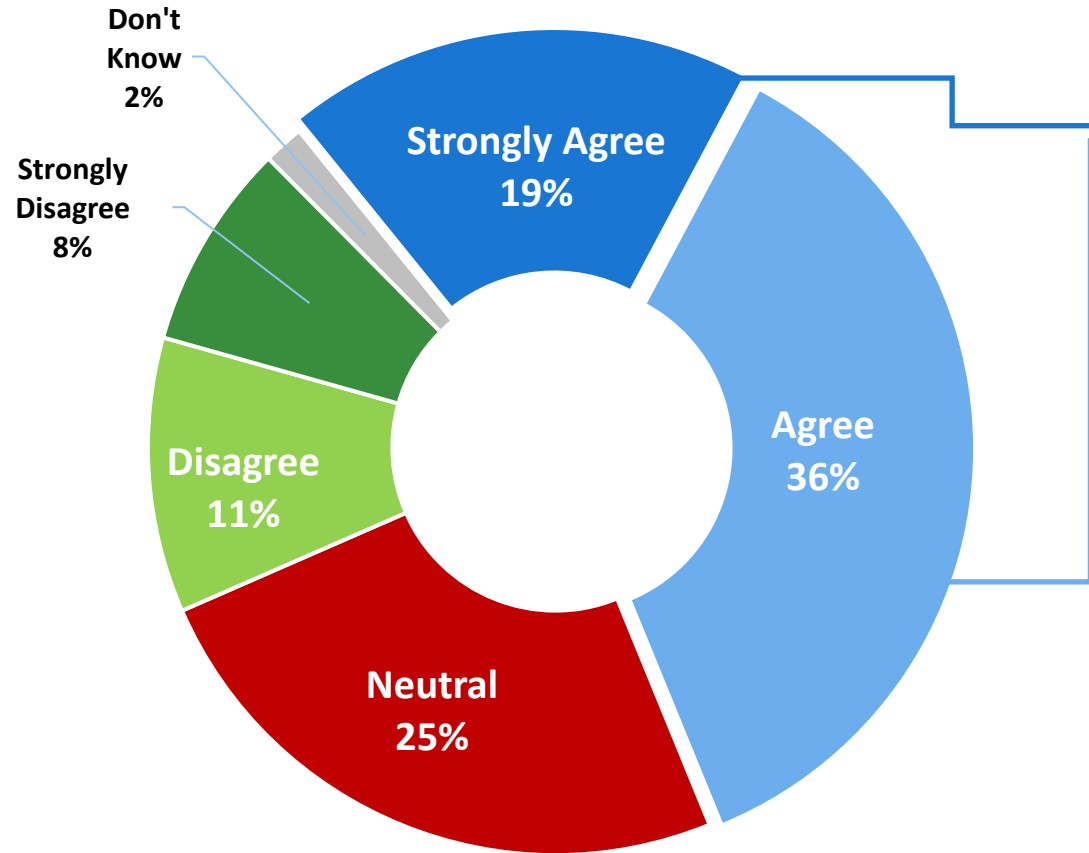
"Since the election, I find myself following the news less closely now"

Millennials Are More Apt to Say They're Listening to Less Public Radio to Get a Break From the News

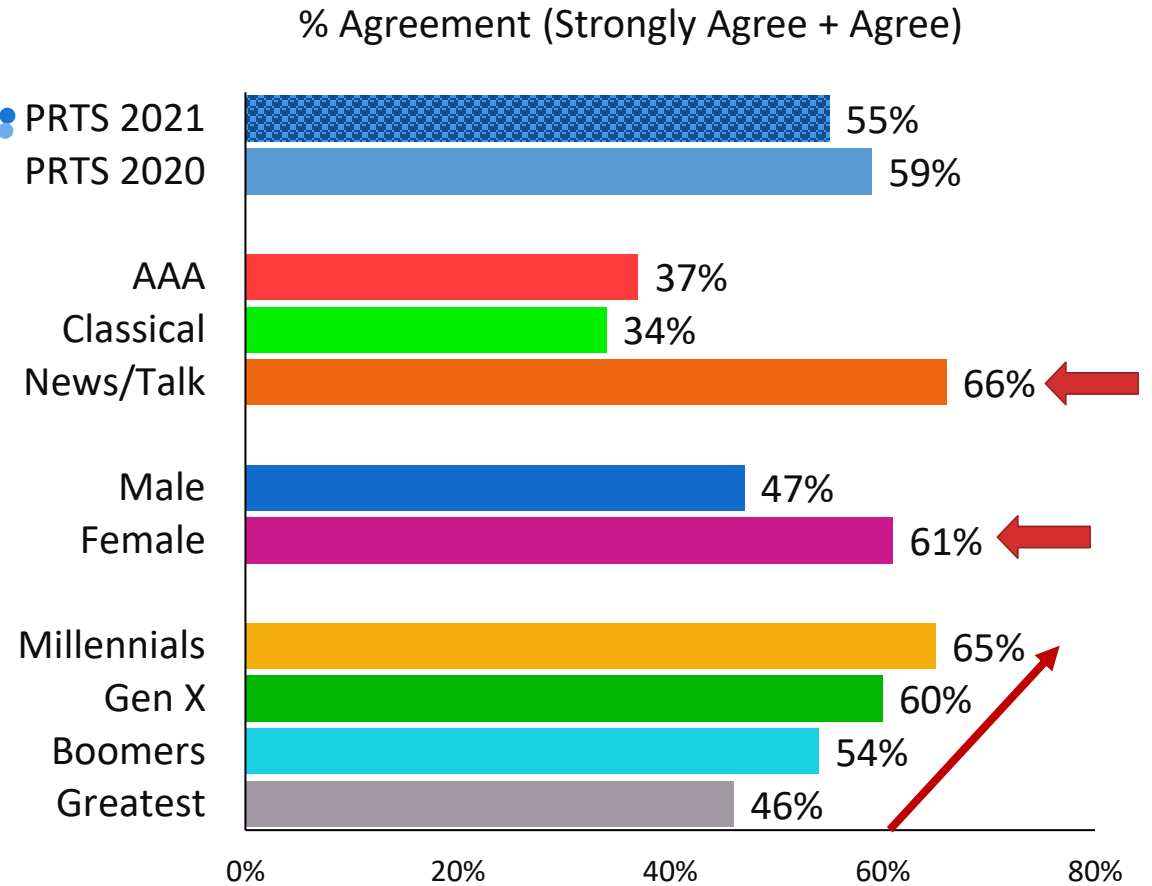


"I find myself spending less time with Public Radio because I increasingly need a break from the news"

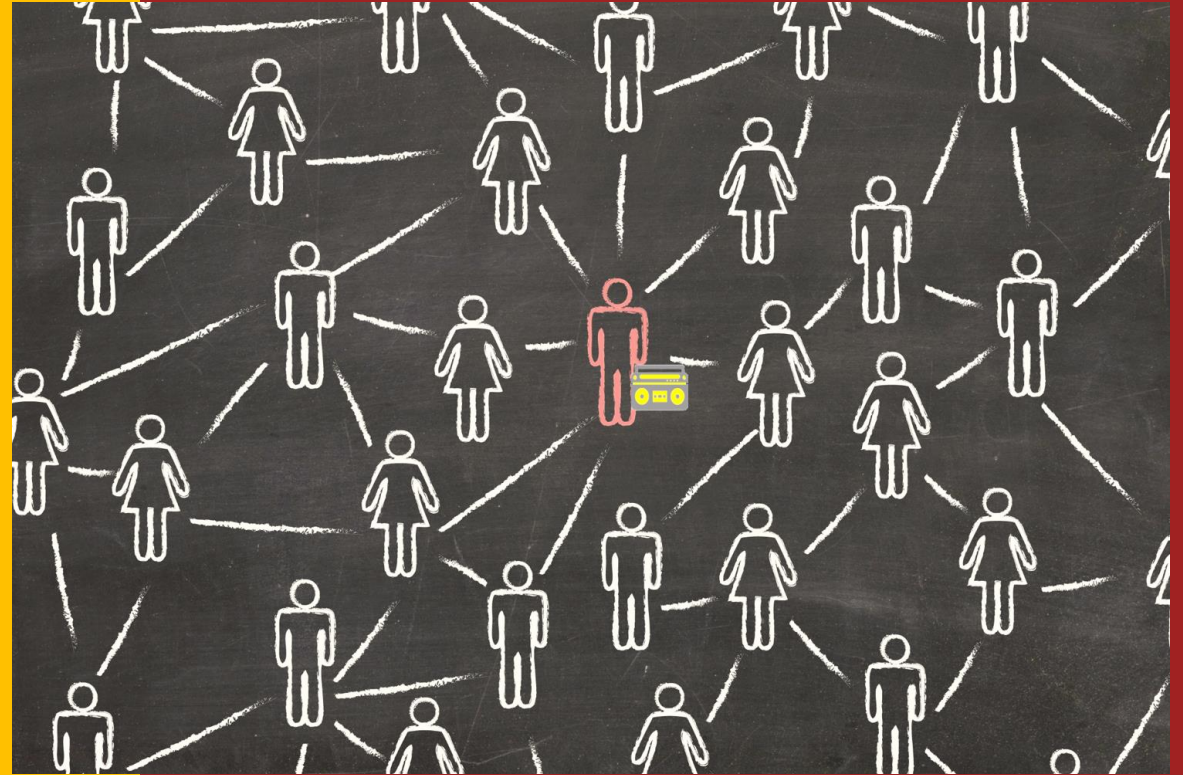
Though Down From the Summer of 2020, Perspective on Race Relations Is Important, Especially to News/Talk Listeners



"I listen to Public Radio for coverage and perspective on race relations"



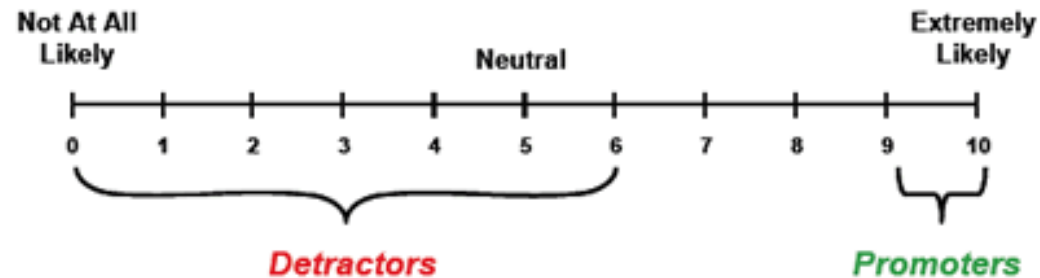
While Public Radio's word-of-mouth has slipped, it is still competitive with past surveys.



NET PROMOTER

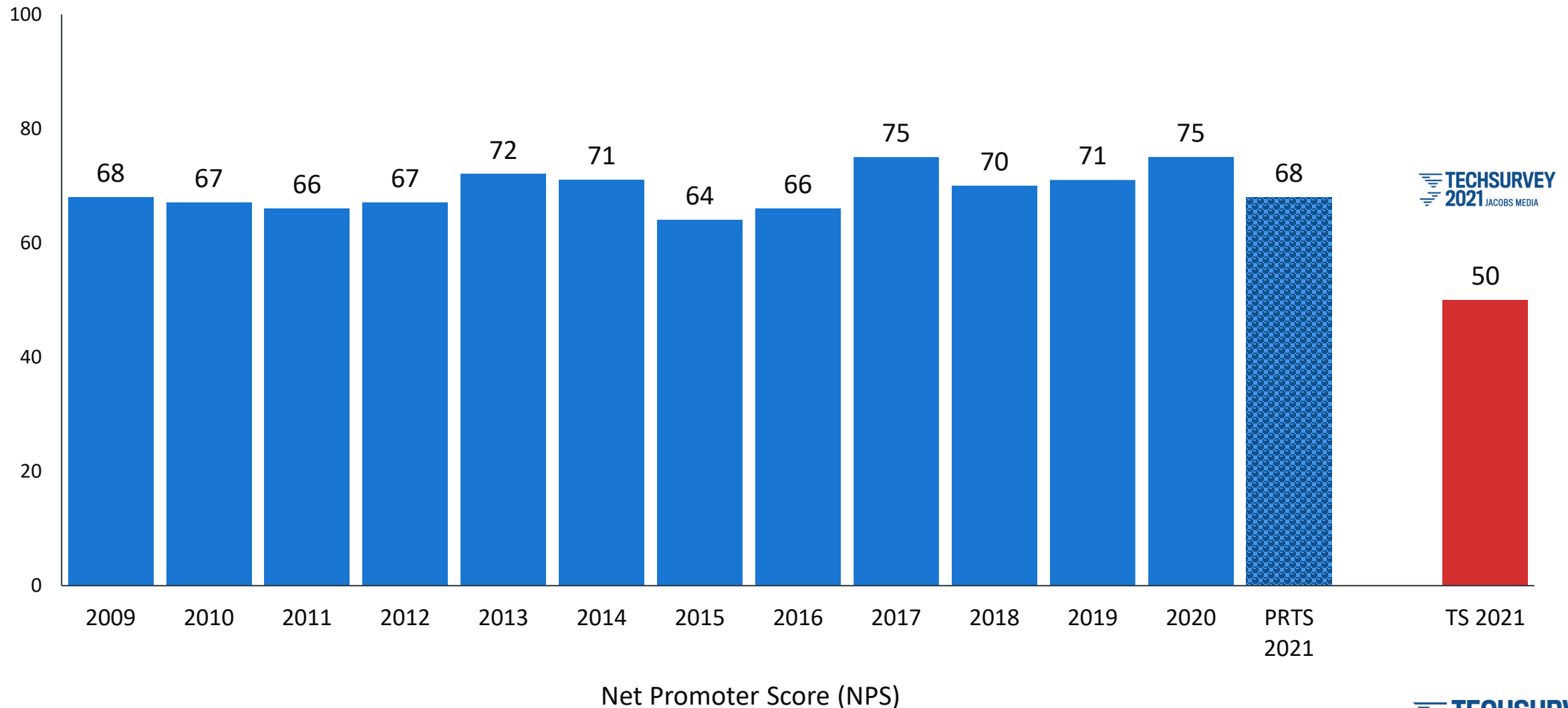


Likelihood To Recommend

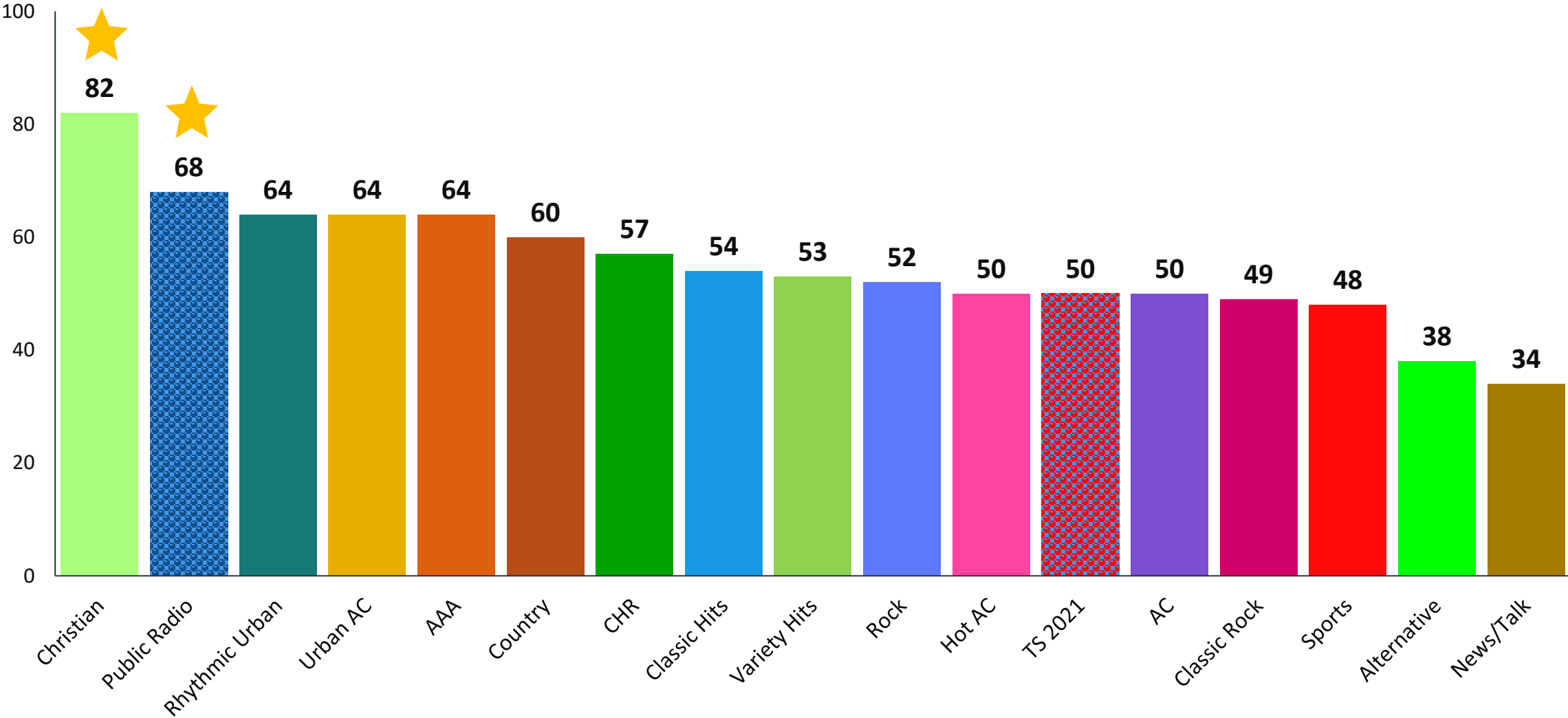


$$\% \text{ Promoters} - \% \text{ Detractors} = \text{Net Promoter Score}$$

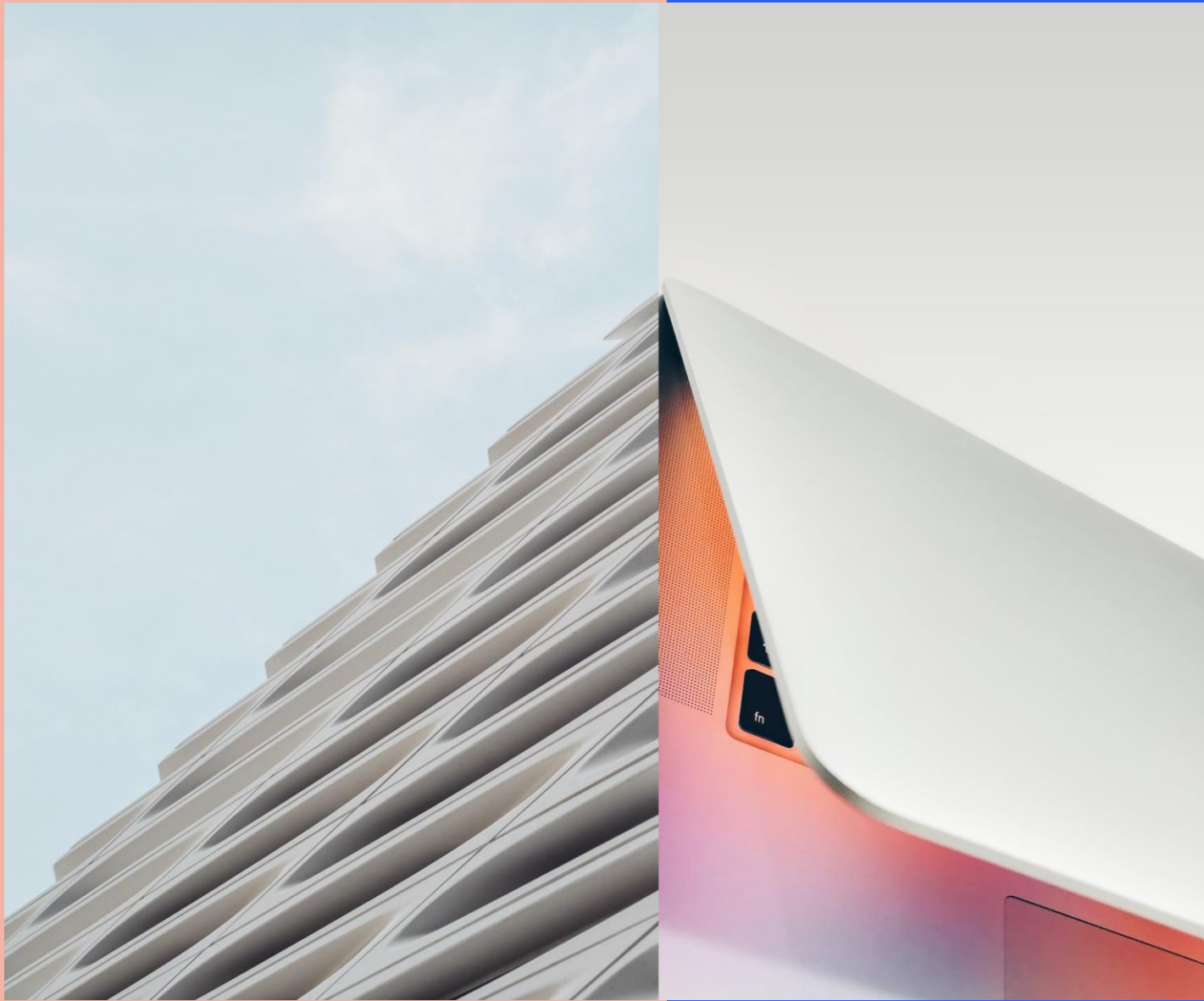
Public Radio's Net Promoter Score Dips, With a New Administration and the Second Year of COVID



Public Radio's NPS Is Secondary to Only Christian Music Radio



Net Promoter Score (NPS)



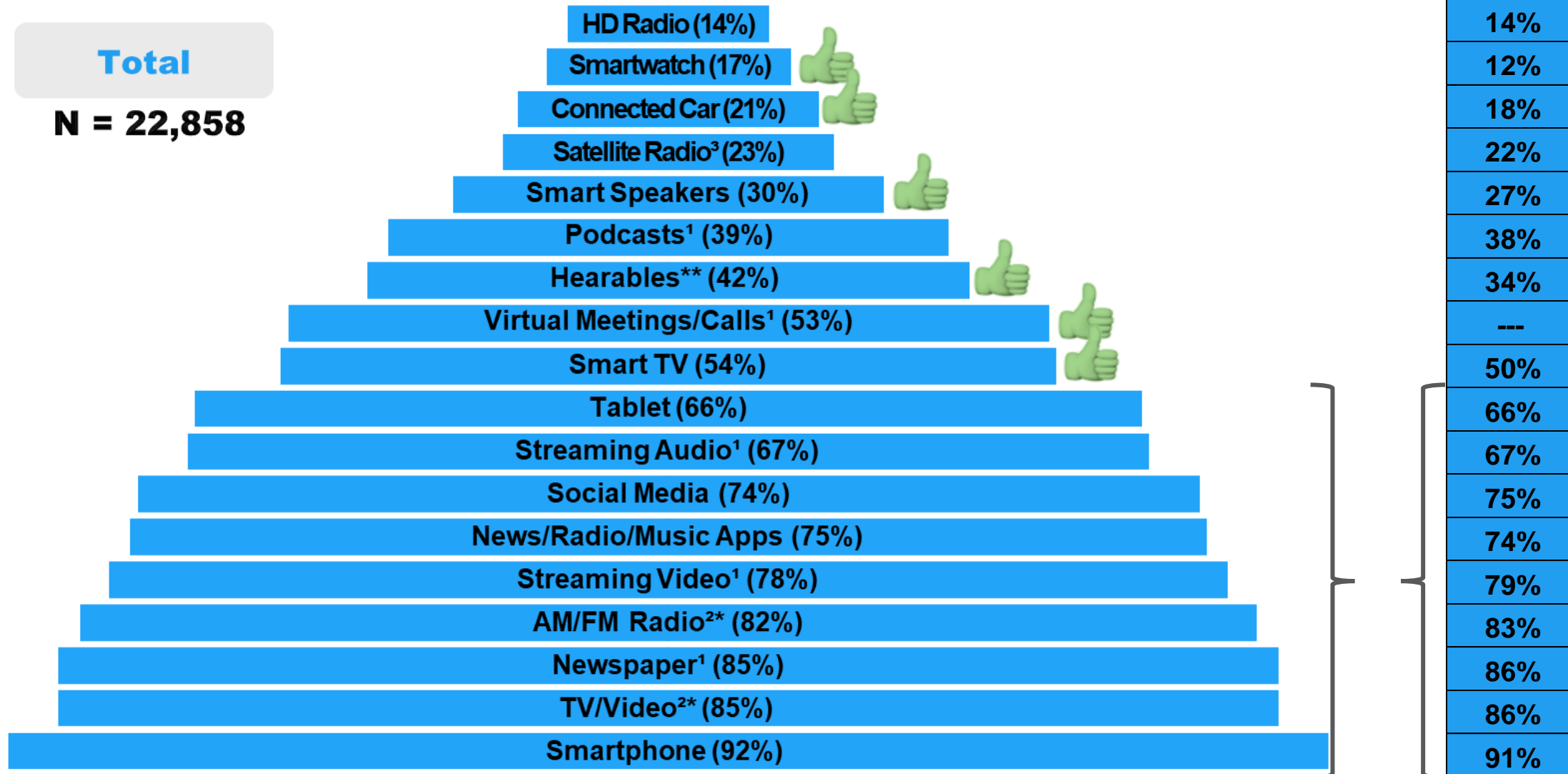
The Media &
Brand
Pyramids are
amazingly
stable.



Media Pyramid 2021

Total

N = 22,858



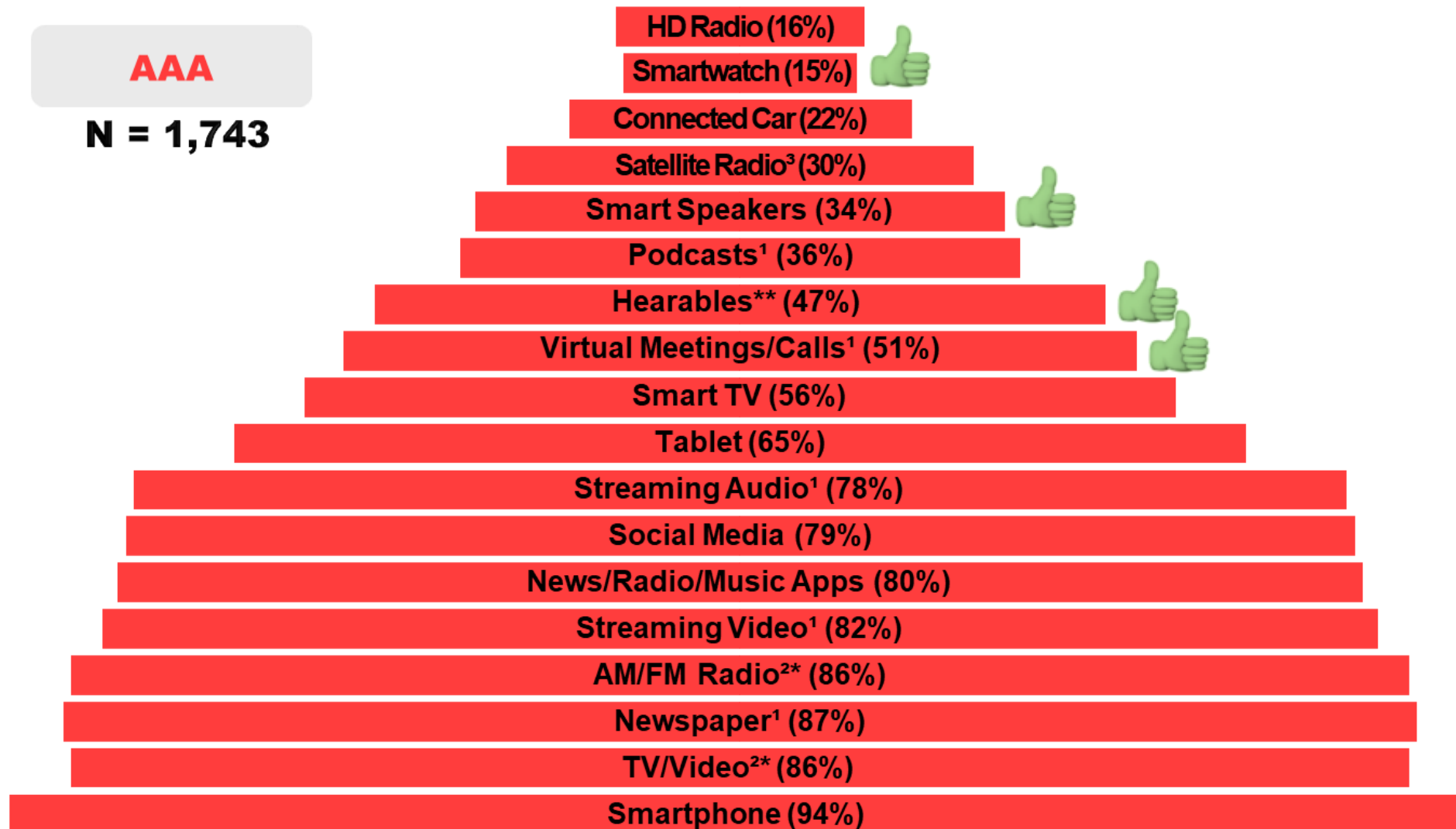
¹ Weekly or more ² 1+ hour per day ³ Paid & trial users *Any platform/device **Wireless headphones/earbuds



Media Pyramid 2021

AAA

N = 1,743



**AAA
PRTS 2020**

14%
11%
20%
29%
30%
36%
38%

54%
65%
76%
80%
81%
82%
86%
86%
86%
94%

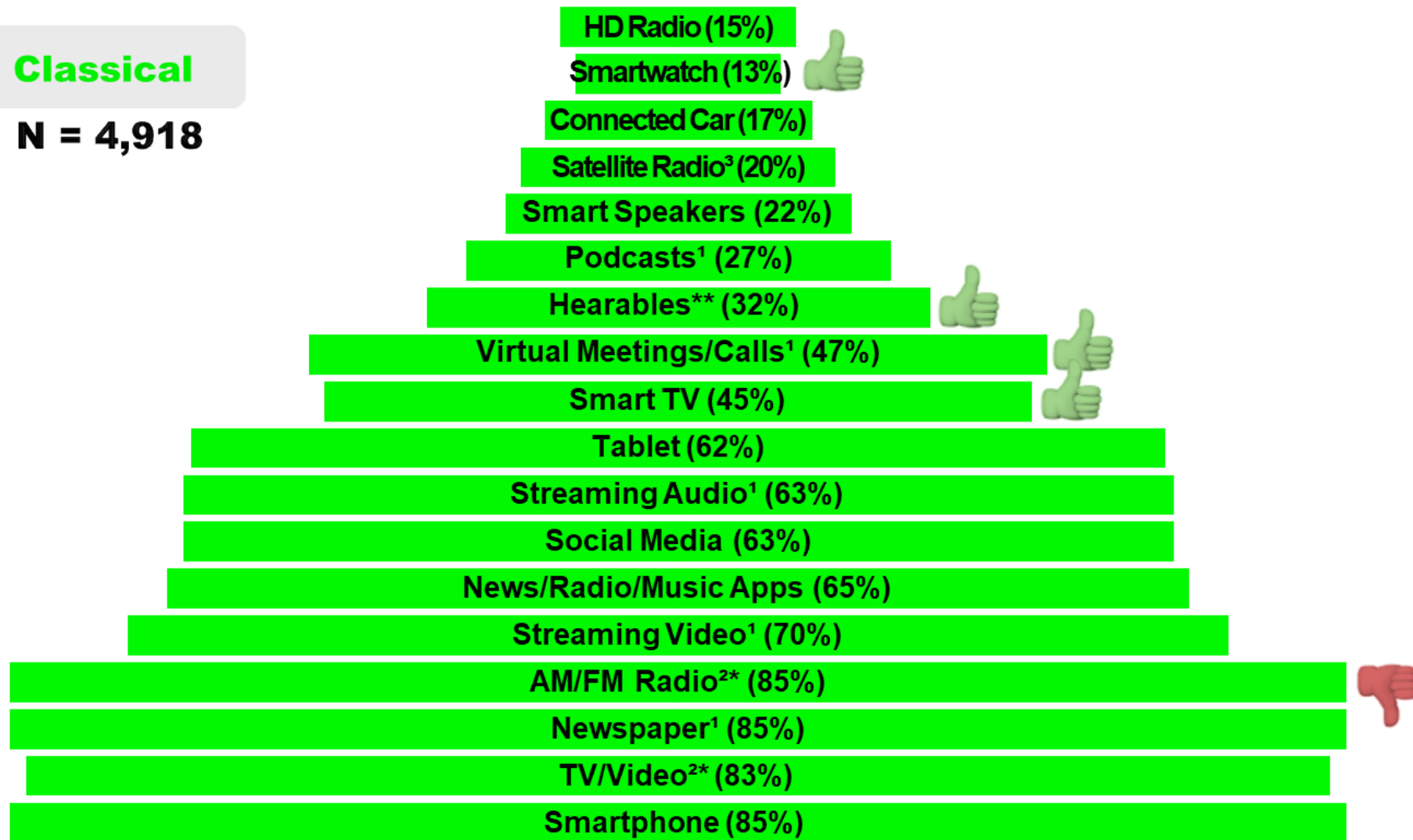
¹ Weekly or more ² 1+ hour per day ³ Paid & trial users *Any platform/device **Wireless headphones/earbuds



Media Pyramid 2021

Classical

N = 4,918



**Classical
PRTS 2020**

16%
8%
15%
21%
21%
27%
26%

42%
62%
62%
65%
64%
71%
88%
87%
85%
85%

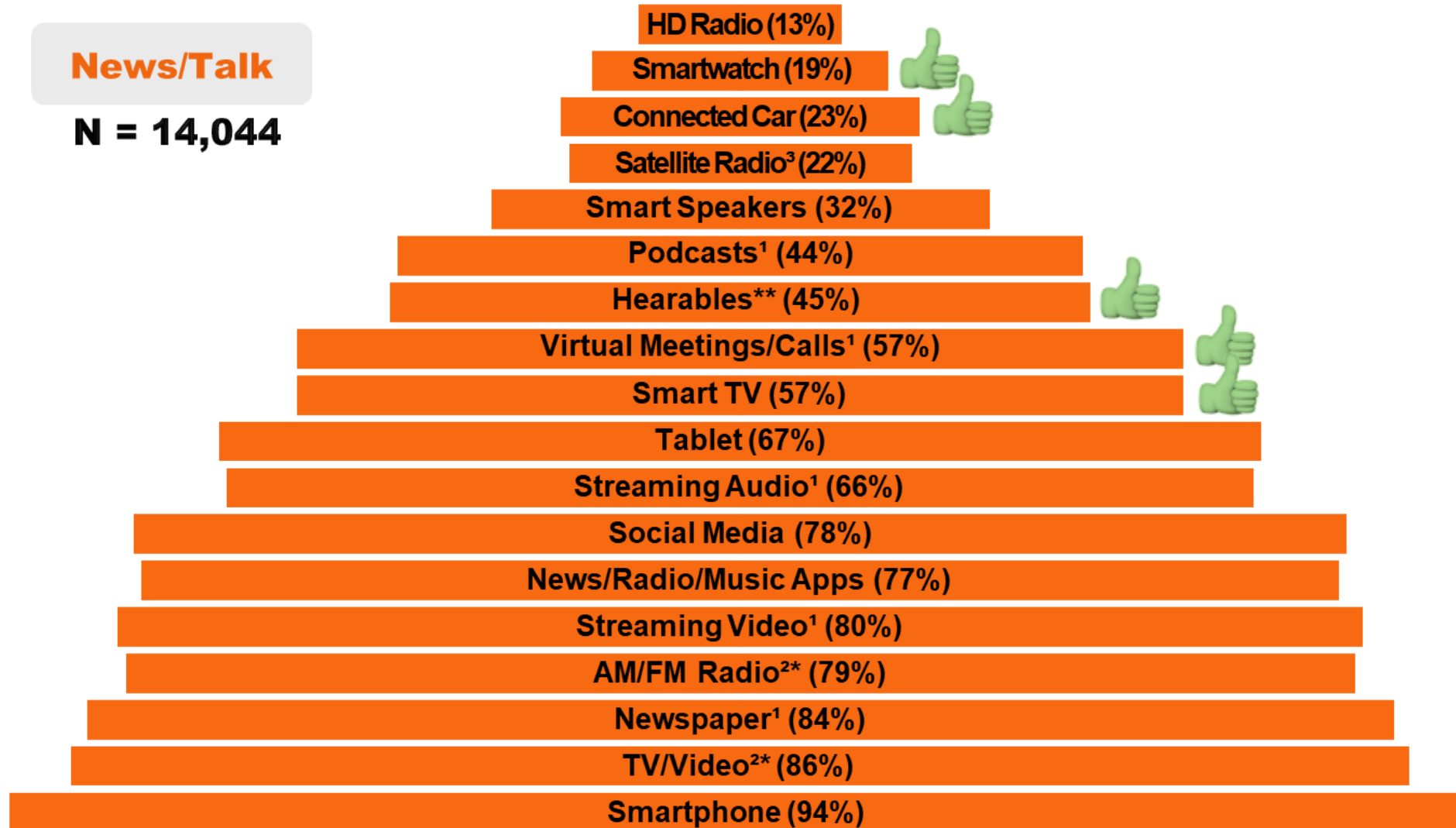
¹ Weekly or more ² 1+ hour per day ³ Paid & trial users *Any platform/device **Wireless headphones/earbuds



Media Pyramid 2021

News/Talk

N = 14,044



**News/Talk
PRTS 2020**

13%

15%

18%

21%

30%

46%

37%

53%

69%

66%

78%

76%

81%

79%

86%

86%

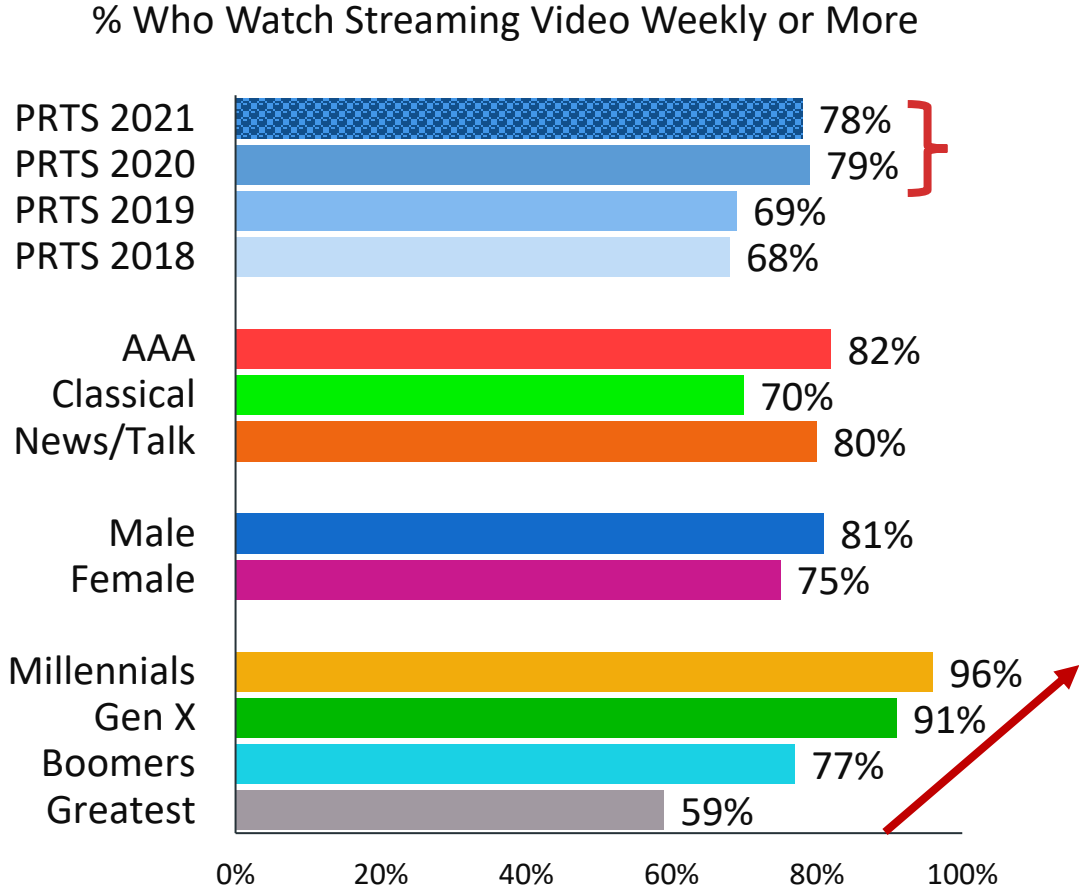
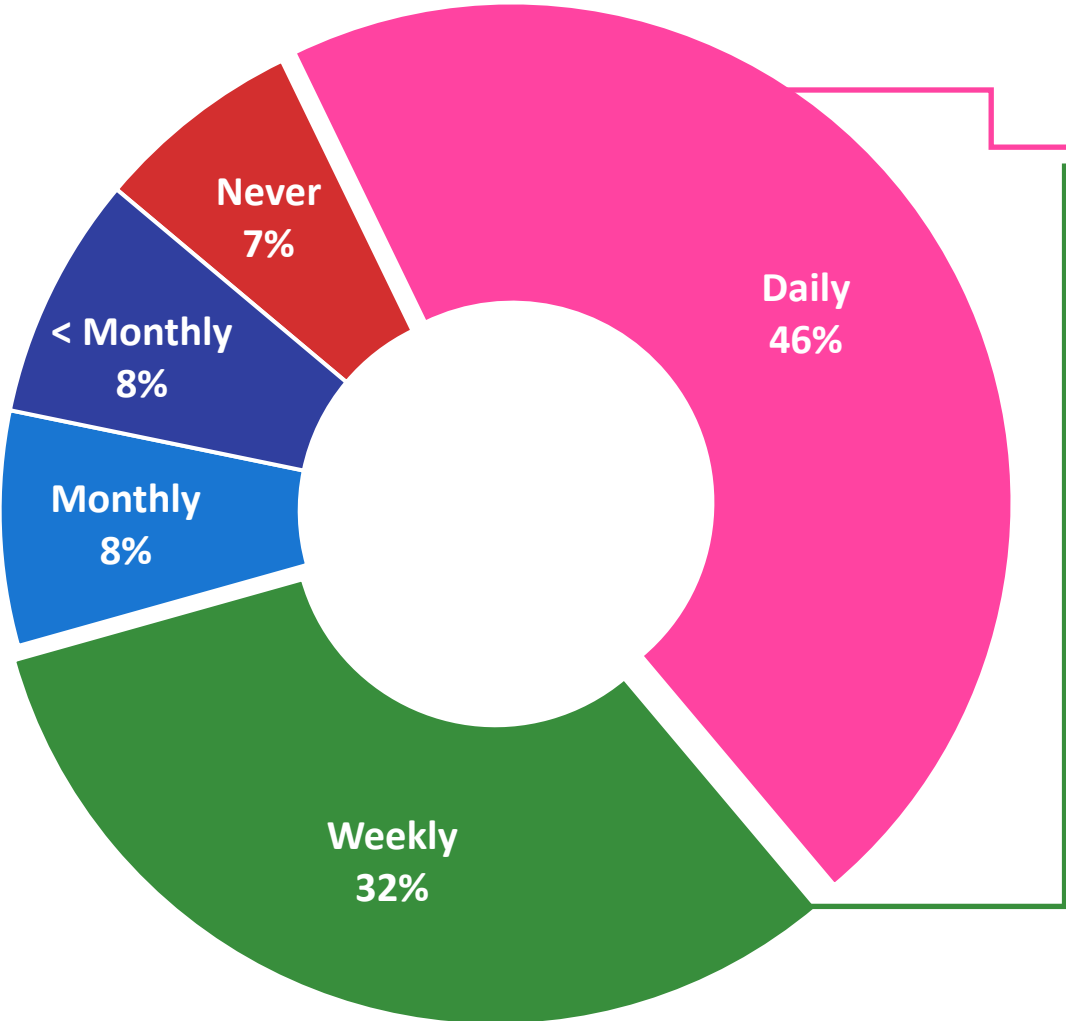
93%

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

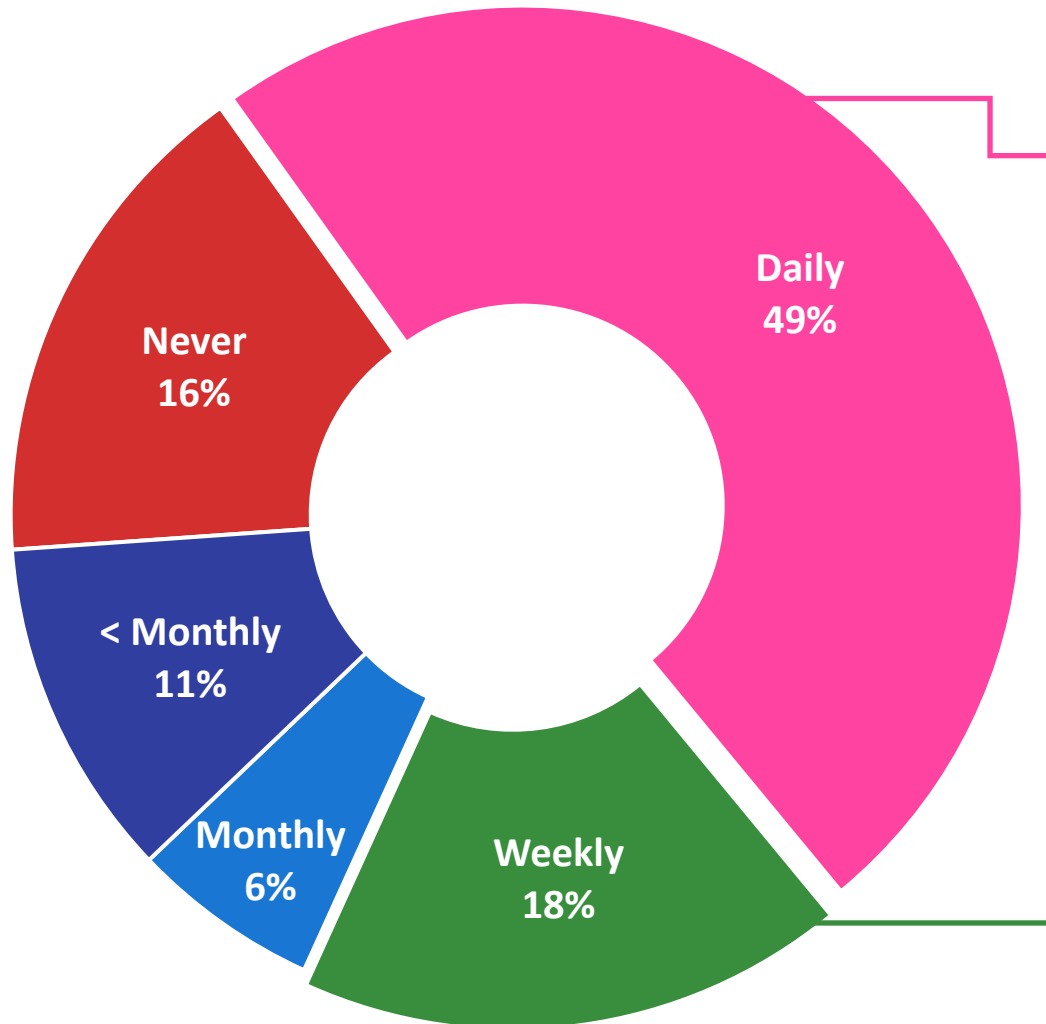


Even as Public Radio fans are returning to “normal,” audio and video streaming are holding onto their COVID highs.

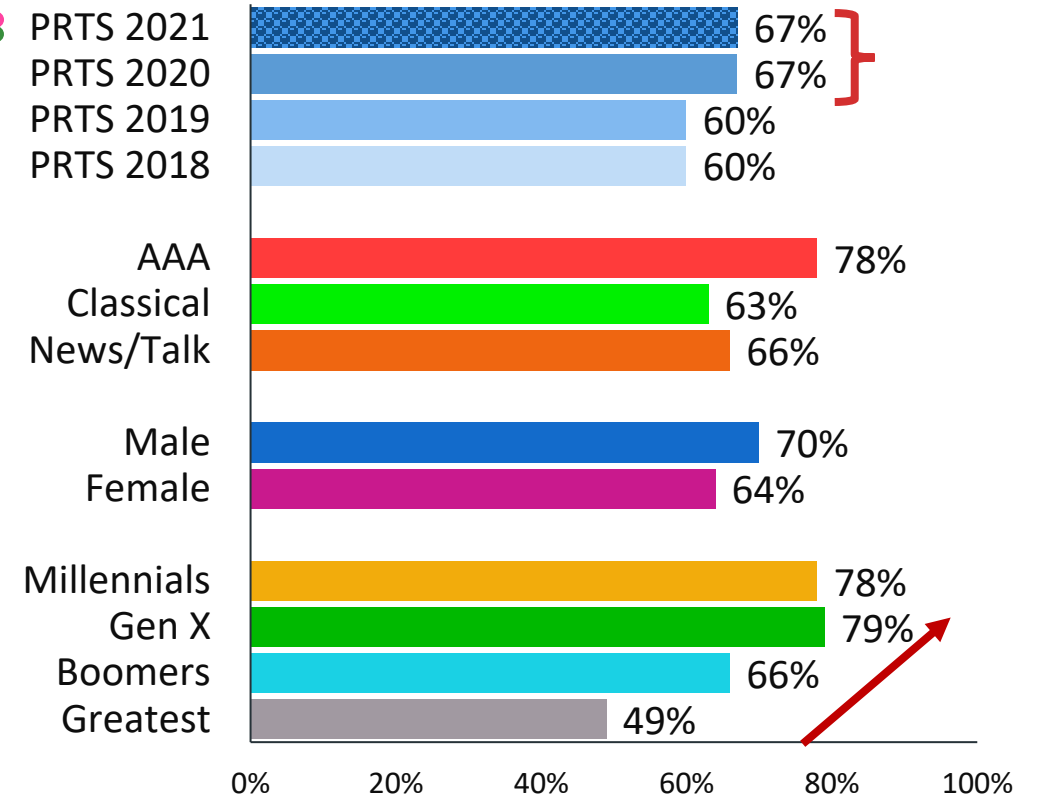
Streaming Video Jumped and Then Maintained During COVID, and Usage Is Nearly Universal Among Younger Generations



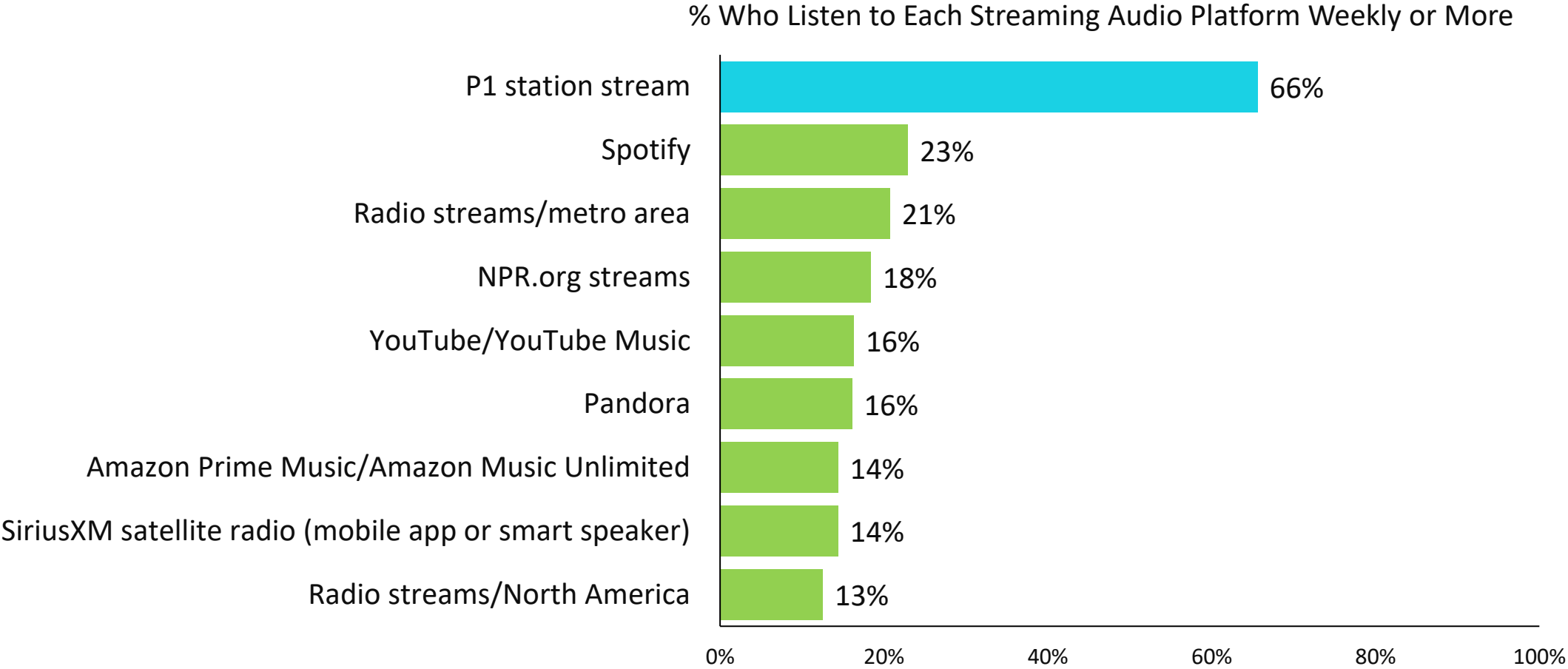
About Half Listen to Streaming Audio Daily; Millennials, Gen Xers, and Triple A Fans Lead the Way



% Who Listen to Streaming Audio Weekly or More



Two in Three Streaming Audio Users Listen to the P1 Station's Stream Weekly or More, Far Ahead of Other Types of Online Audio



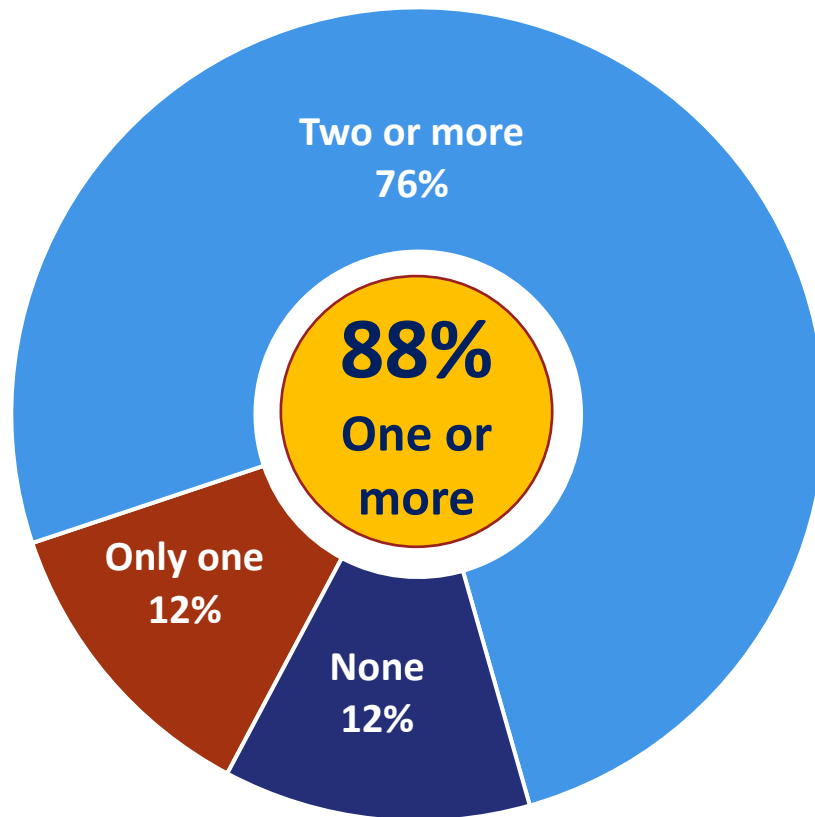
Among those who listen to streaming audio monthly or more
(top 9 platforms shown)



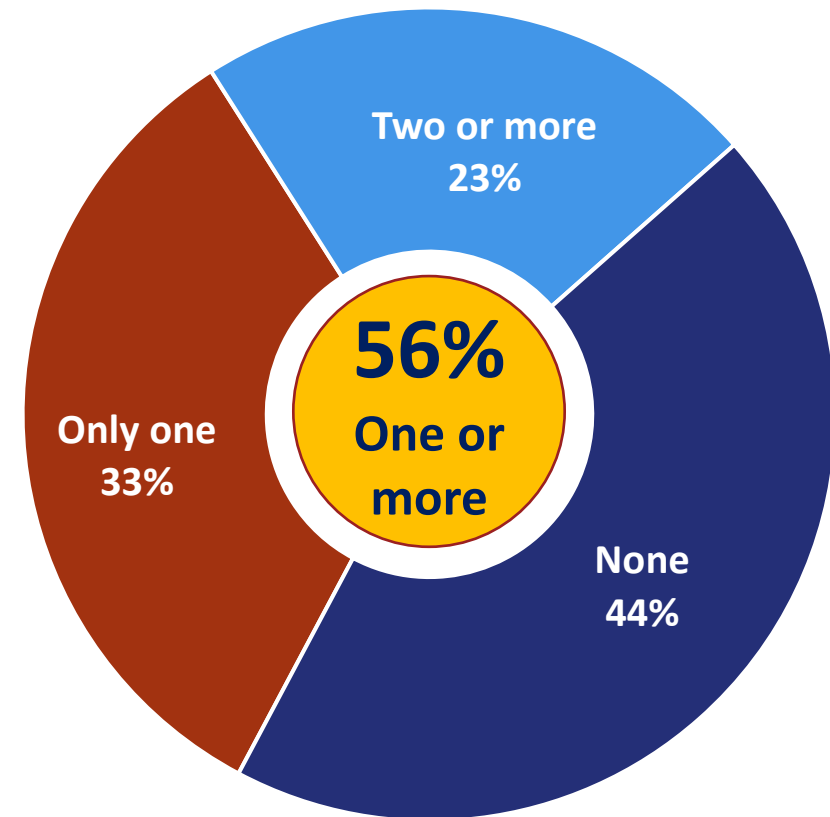
The
subscription
economy is
going strong as
Public Radio
fans pay for
content.

Nearly Nine in Ten Subscribe to Video Streaming Services, More Than Audio Streaming Platforms By Far

Paid **VIDEO** Streaming Subscriptions



Paid **AUDIO** Streaming Subscriptions

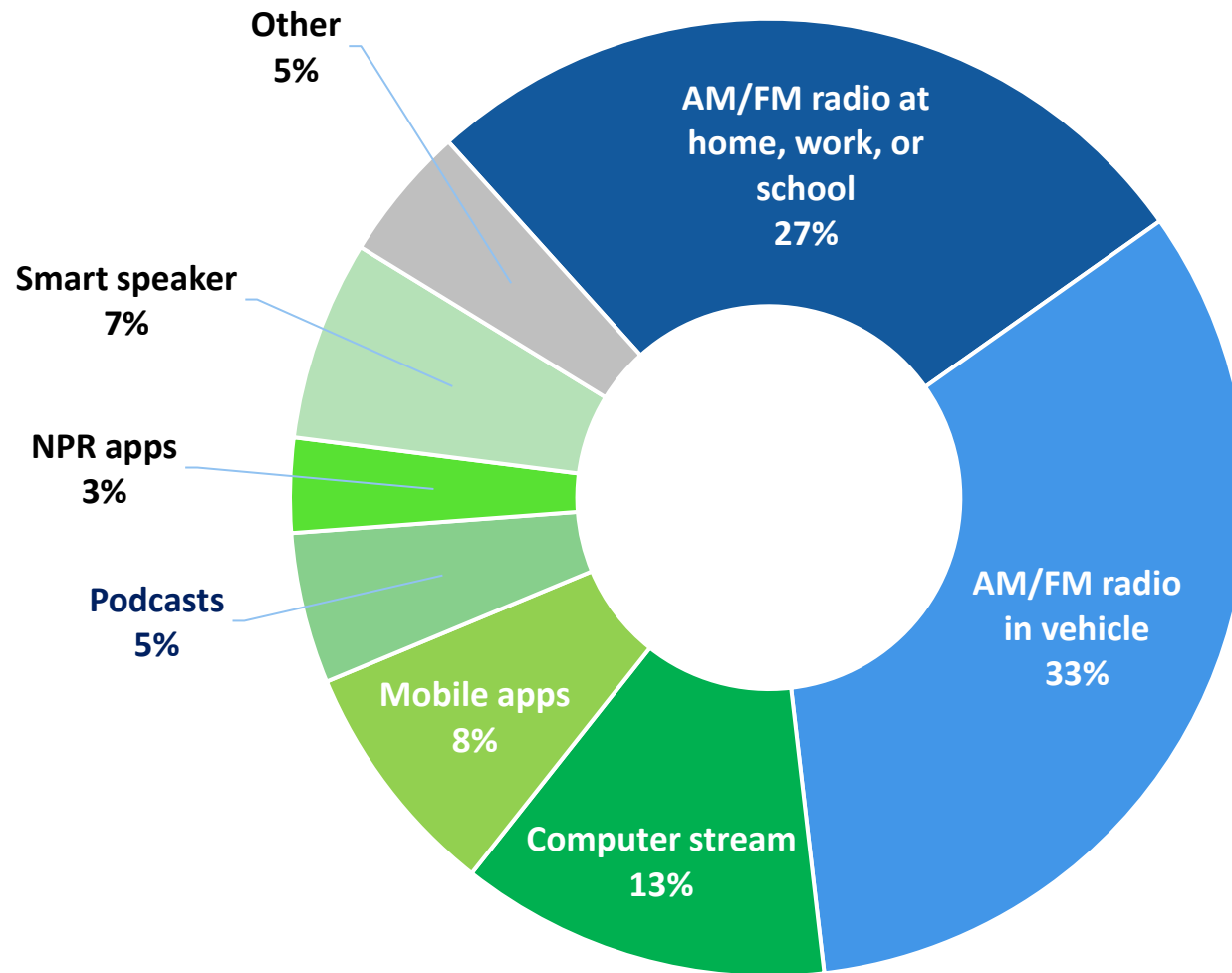




Digital
continues to
play a key role
in Public Radio
usage.

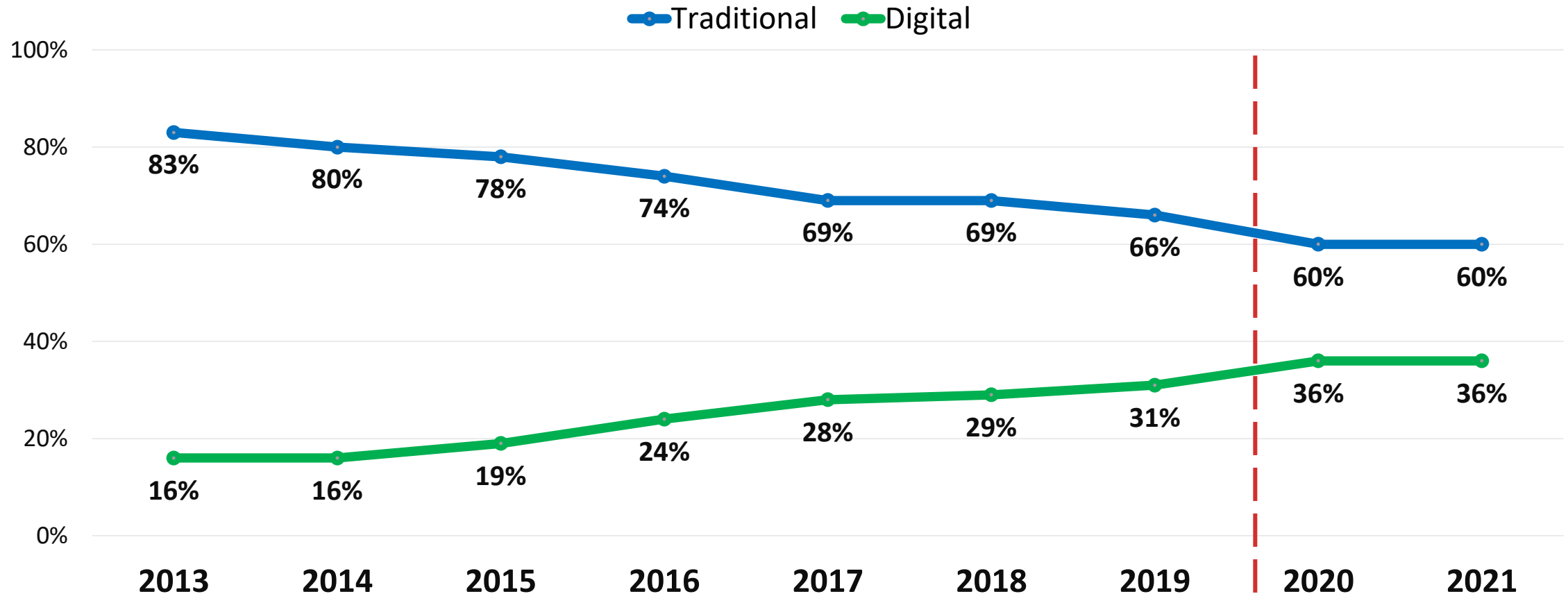
P1 Station Listening Platforms

Total



Traditional – 60%
Digital – 36%

P1 Station Listening Platforms: Traditional vs. Digital

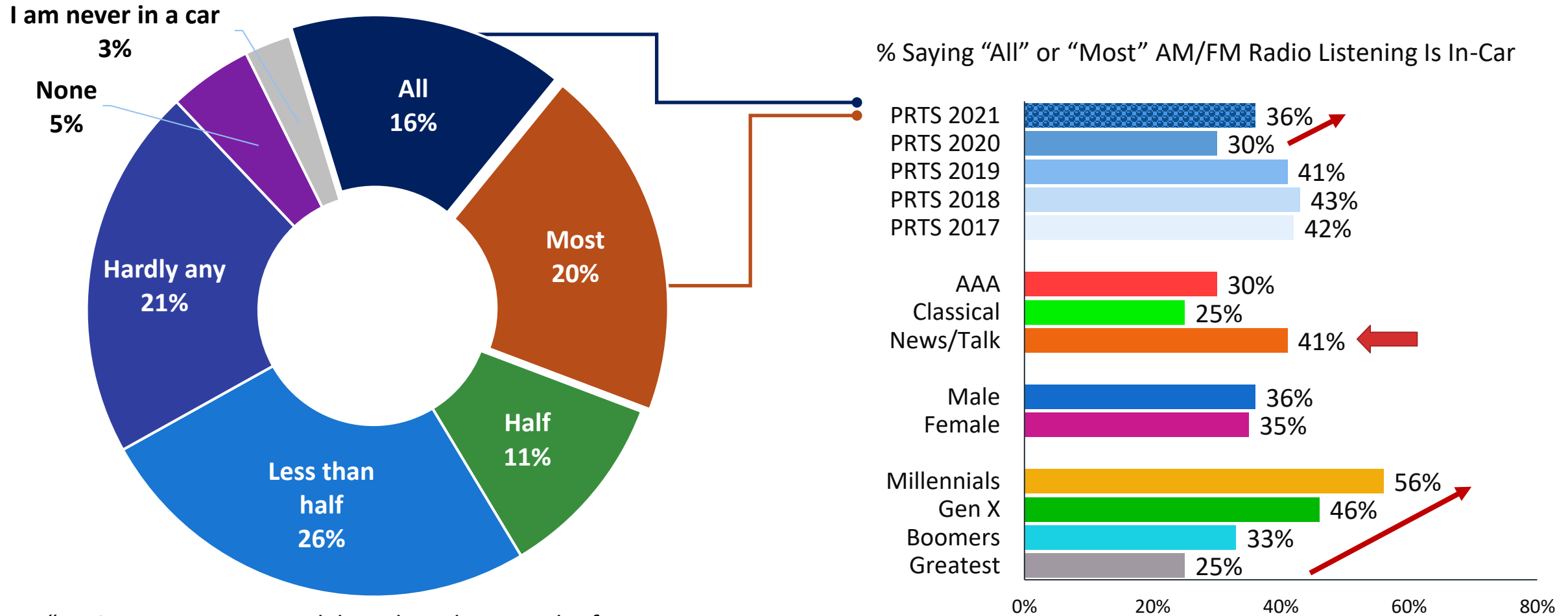


% of time spent with P1 station in a typical week via
traditional platforms (an AM/FM radio at home/school/work or in a vehicle)
vs. digital platforms (computer, mobile/NPR apps, podcasts, smart speaker)



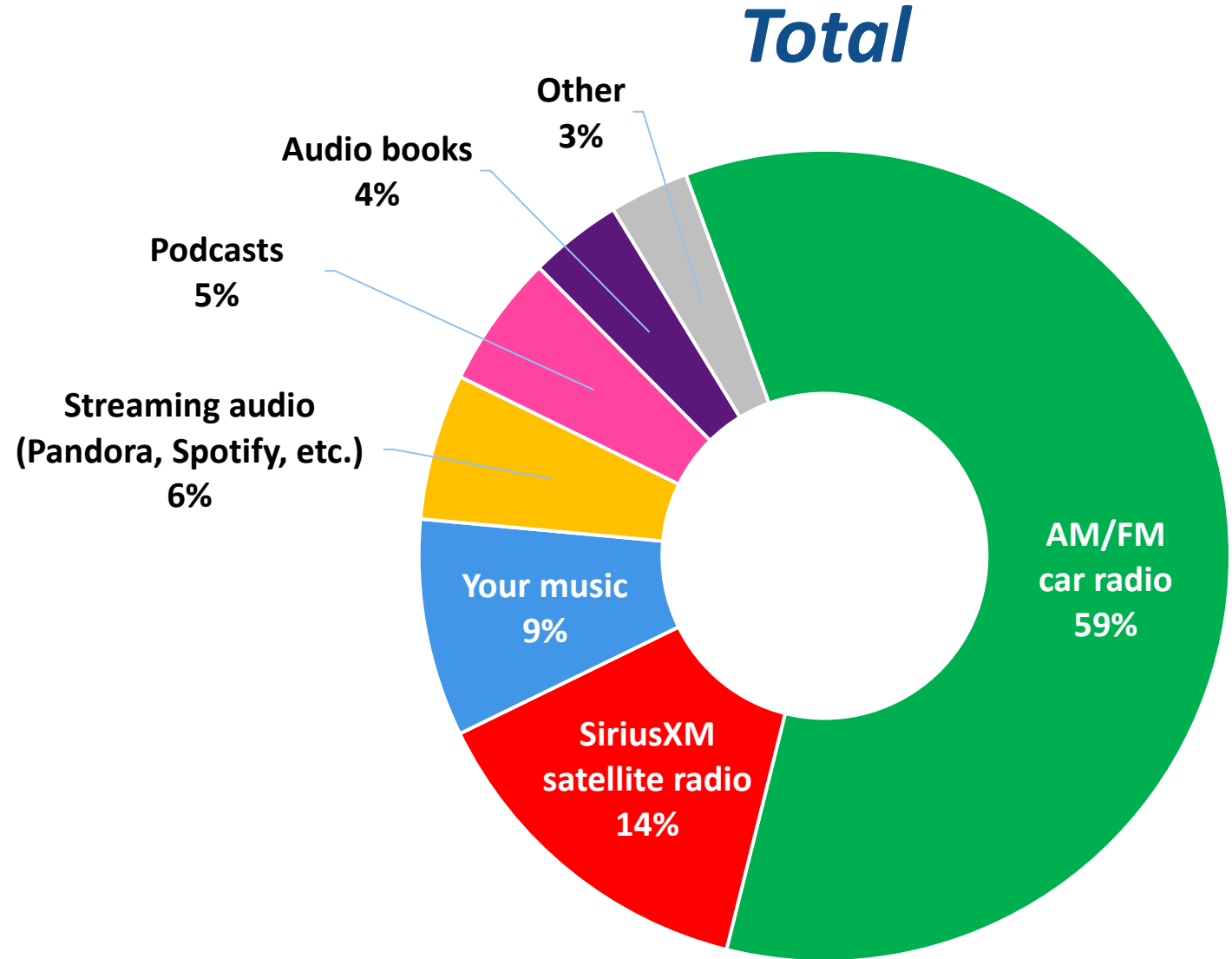
Listeners are returning to the road, but still not back to 2019 levels.

Heavy In-Car Radio Listening Rebounds – Especially Among Younger Listeners – But Still Below Pre-COVID Levels



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

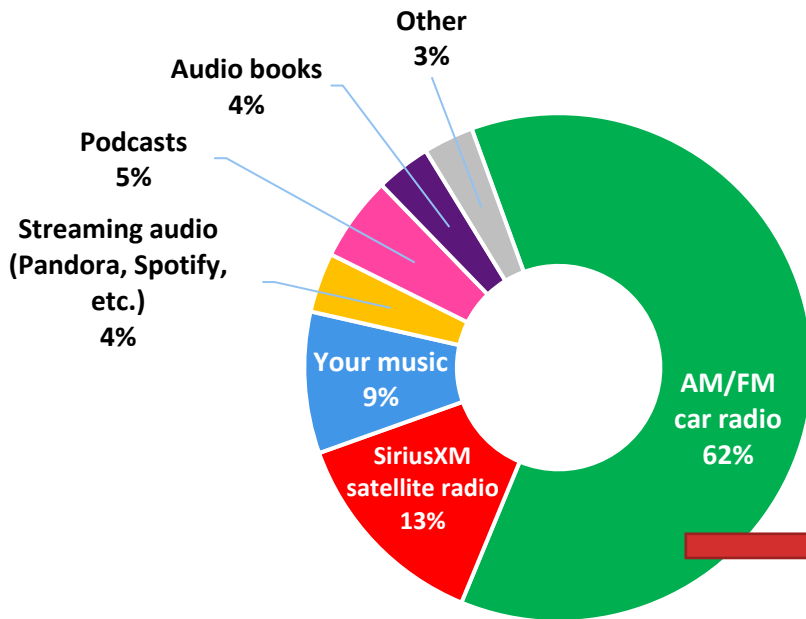
Broadcast Radio Continues Its In-Car Audio Dominance...



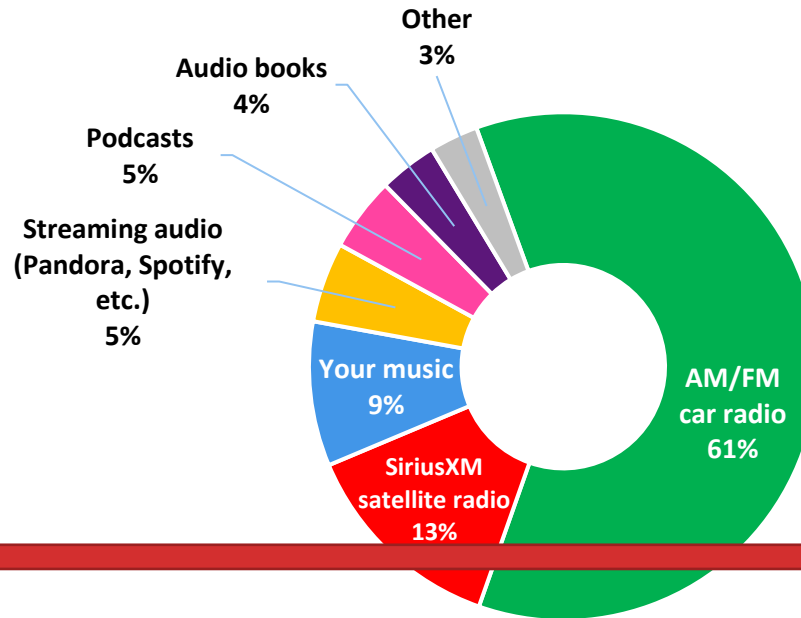
...But Its Share Continues to Tick Downward Each Year

Total

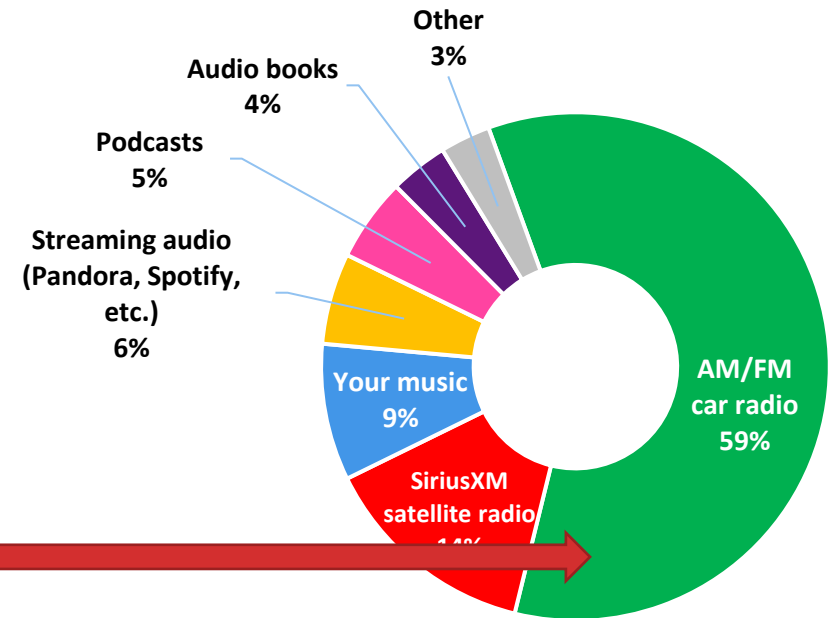
PRTS 2019



PRTS 2020



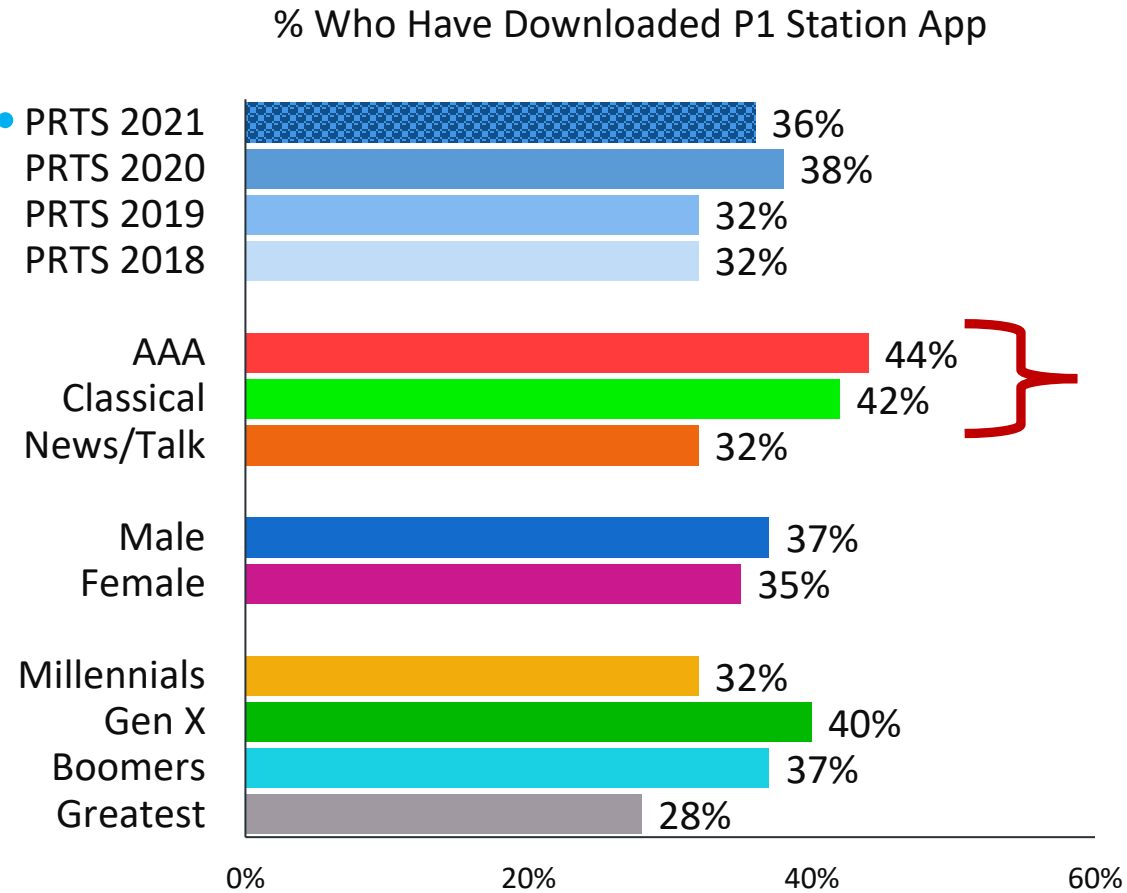
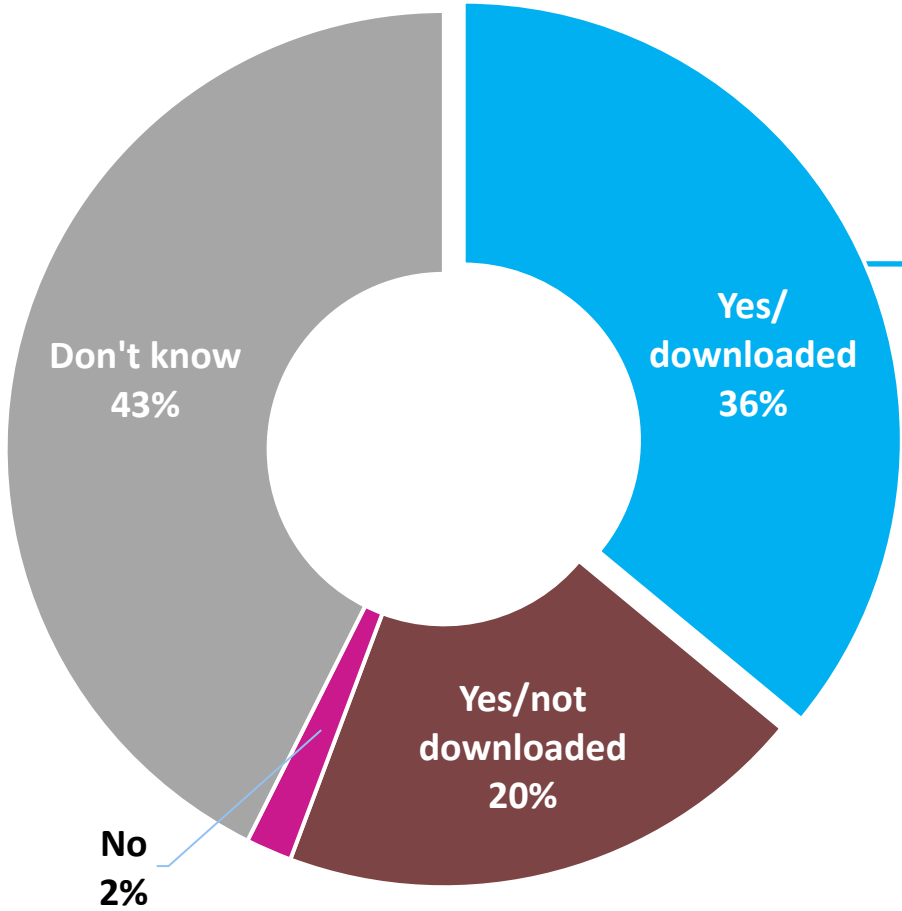
PRTS 2021





**Mobile plays
an integral
part in Public
Radio content
consumption.**

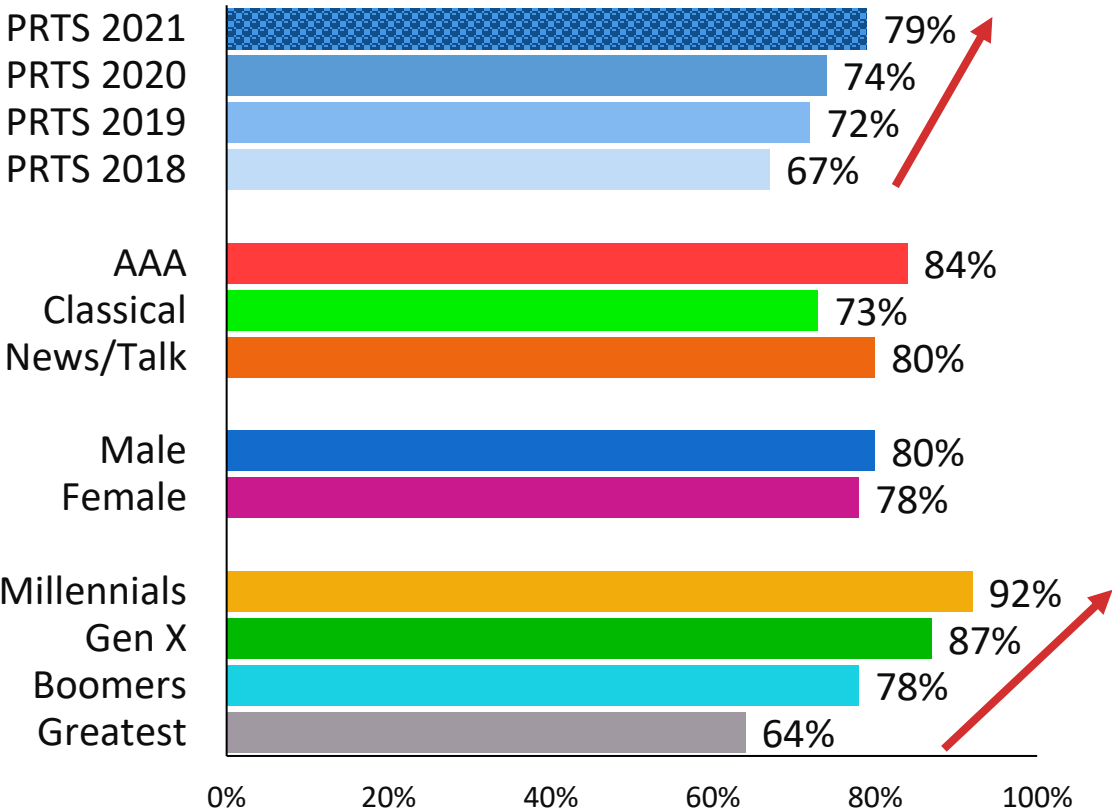
More Than One in Three Mobile Device Owners Has Downloaded Their P1 Station's App, Highest Among Music Fans



Among smartphone and/or tablet owners

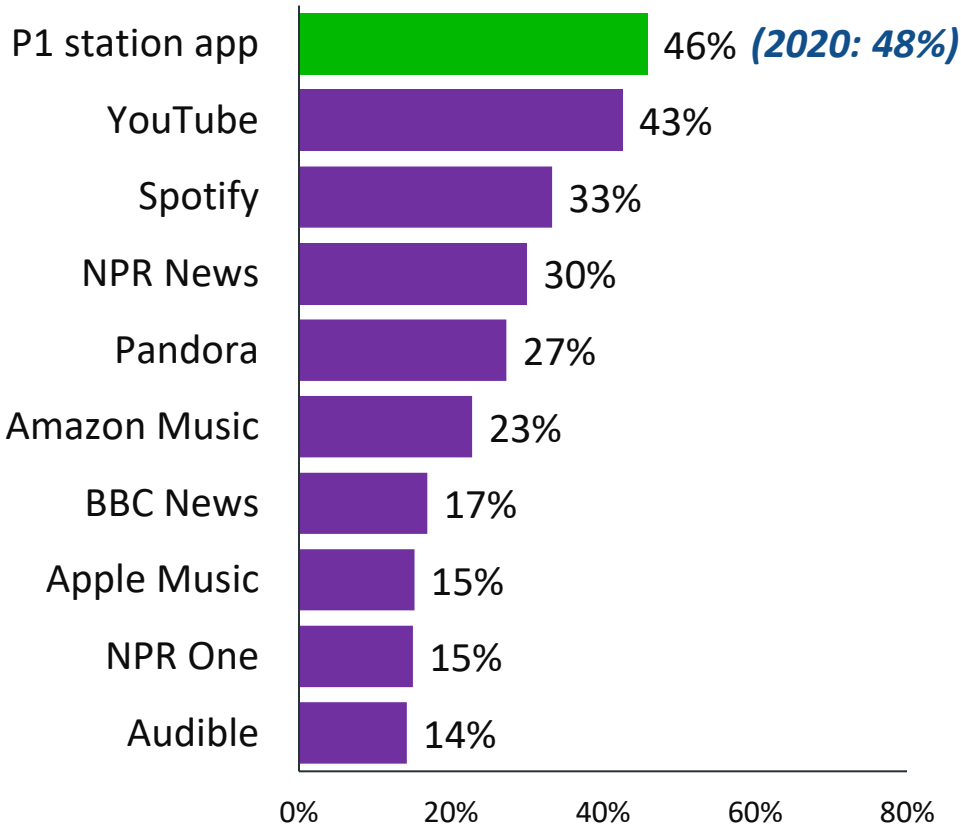
Four in Five Have Downloaded a News/Radio/Music App on Their Mobile Device; the P1 Station App Is Most Downloaded

% Who Have Downloaded a News/Radio/Music App



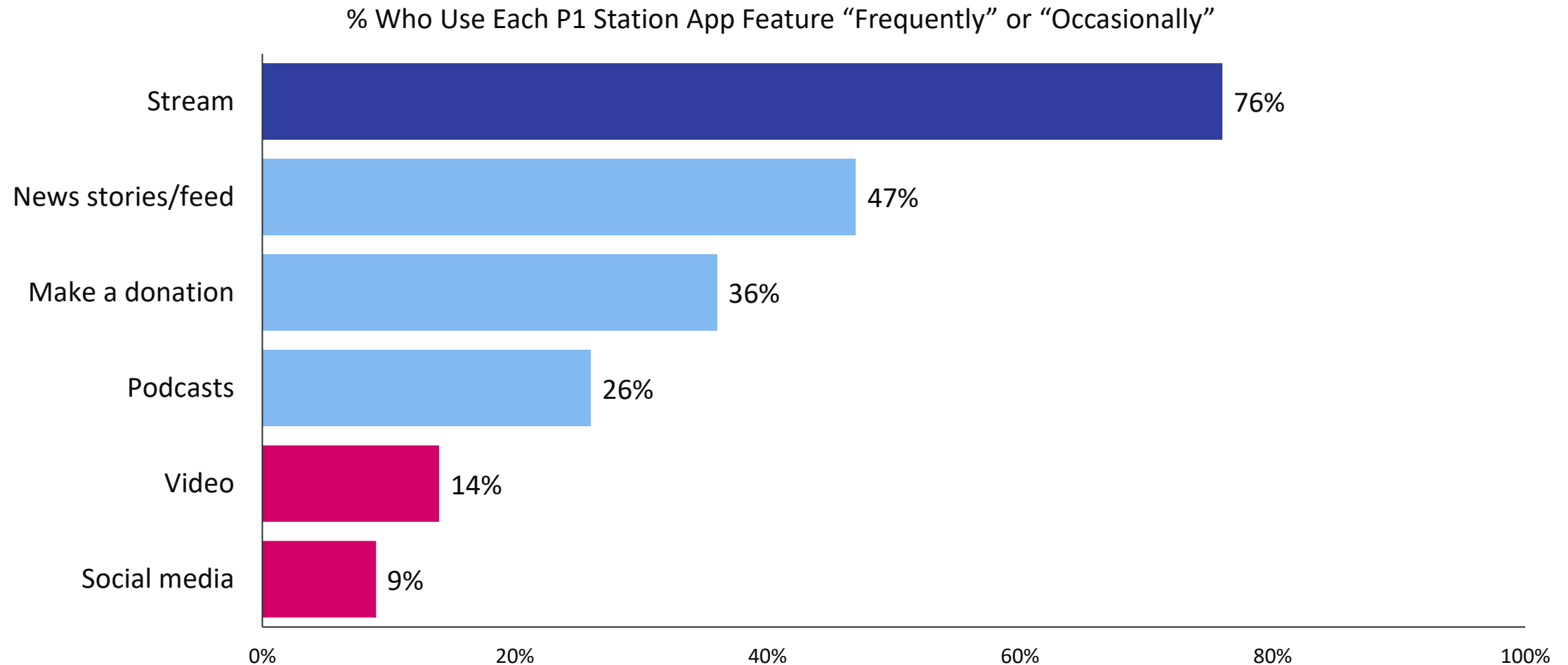
Among smartphone and/or tablet owners

% of Smartphone/Tablet Owners Who Have Downloaded Each News/Radio/Music App



Among those who have downloaded a news/radio/music app
(Top 10 apps downloaded shown)

Use of the Stream Dominates, But More Than One in Four Use the App to Access News, Donations, or Podcasts

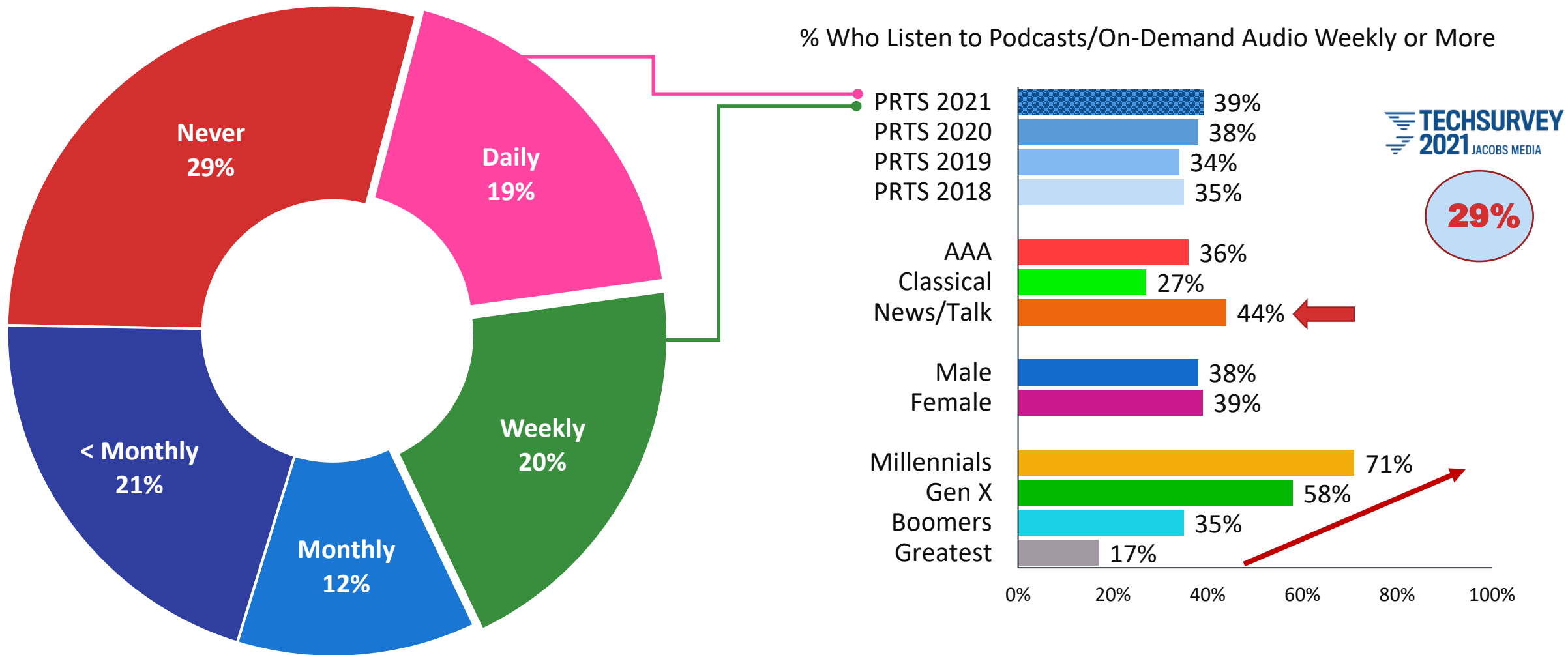


Among smartphone and/or tablet owners who have downloaded P1 station app

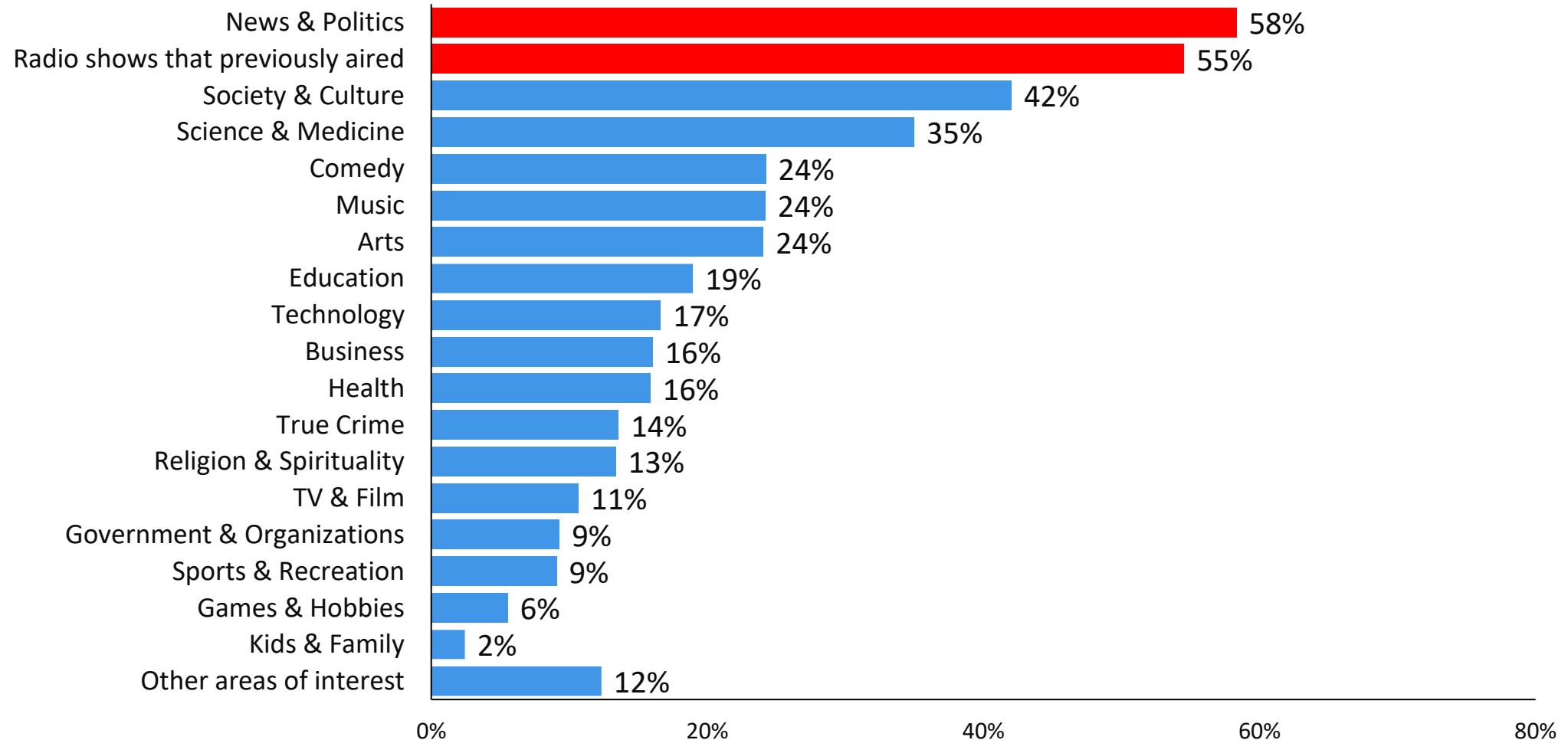


**Podcasting
continues to
grow, especially
among younger
listeners.**

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



News & Politics Podcasts and Radio Shows that Previously Aired Dominate Among Weekly Podcast Listeners

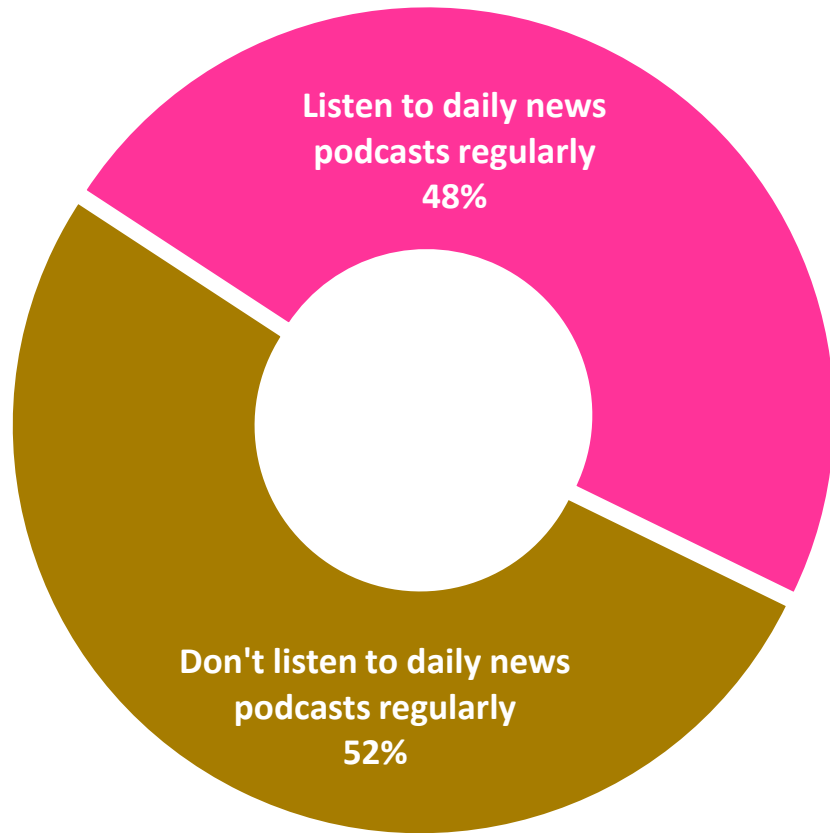


Among weekly podcast listeners, % who regularly listen to podcasts in each category



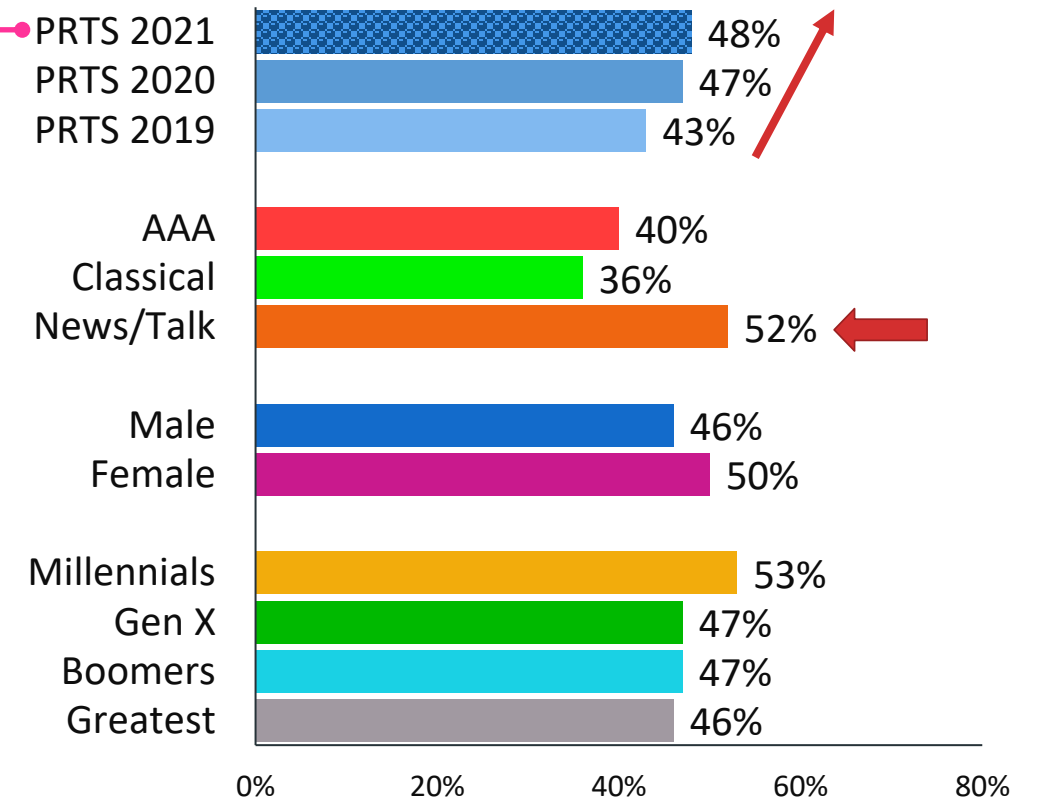
**Daily news
podcasts and local
online newsletters
are new ways
Public Radio fans
are accessing
news content.**

Nearly Half of Weekly Podcast Consumers Regularly Listen to Daily News Podcasts, Particularly News/Talk Format Fans

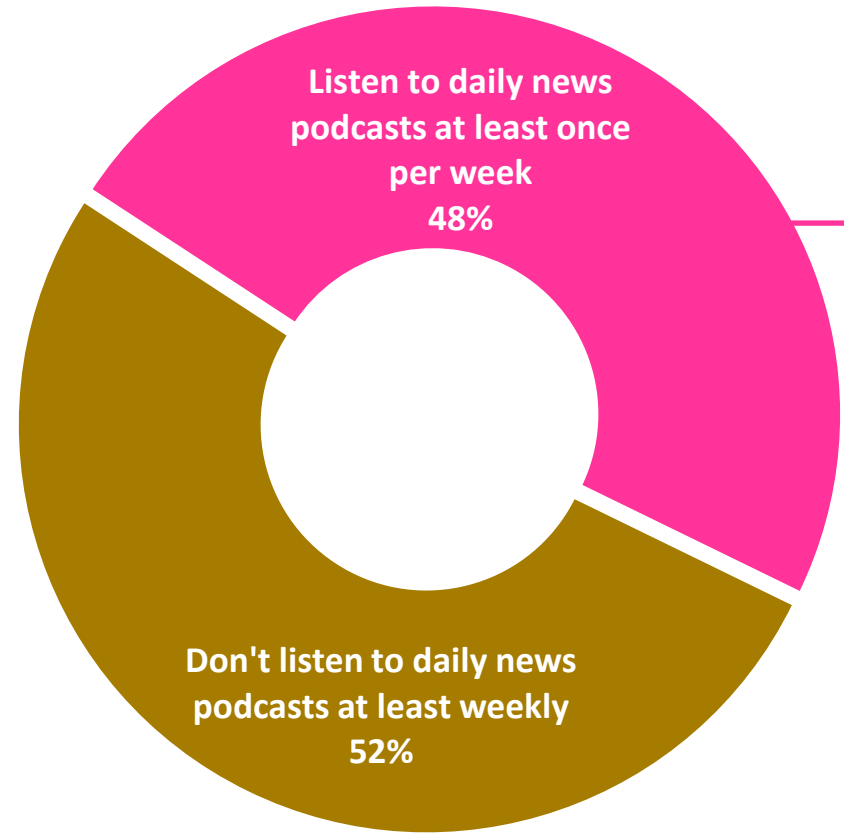


"Which of the following daily news podcasts -- featuring news and headlines each morning -- do you listen to at least once per week or more often?"

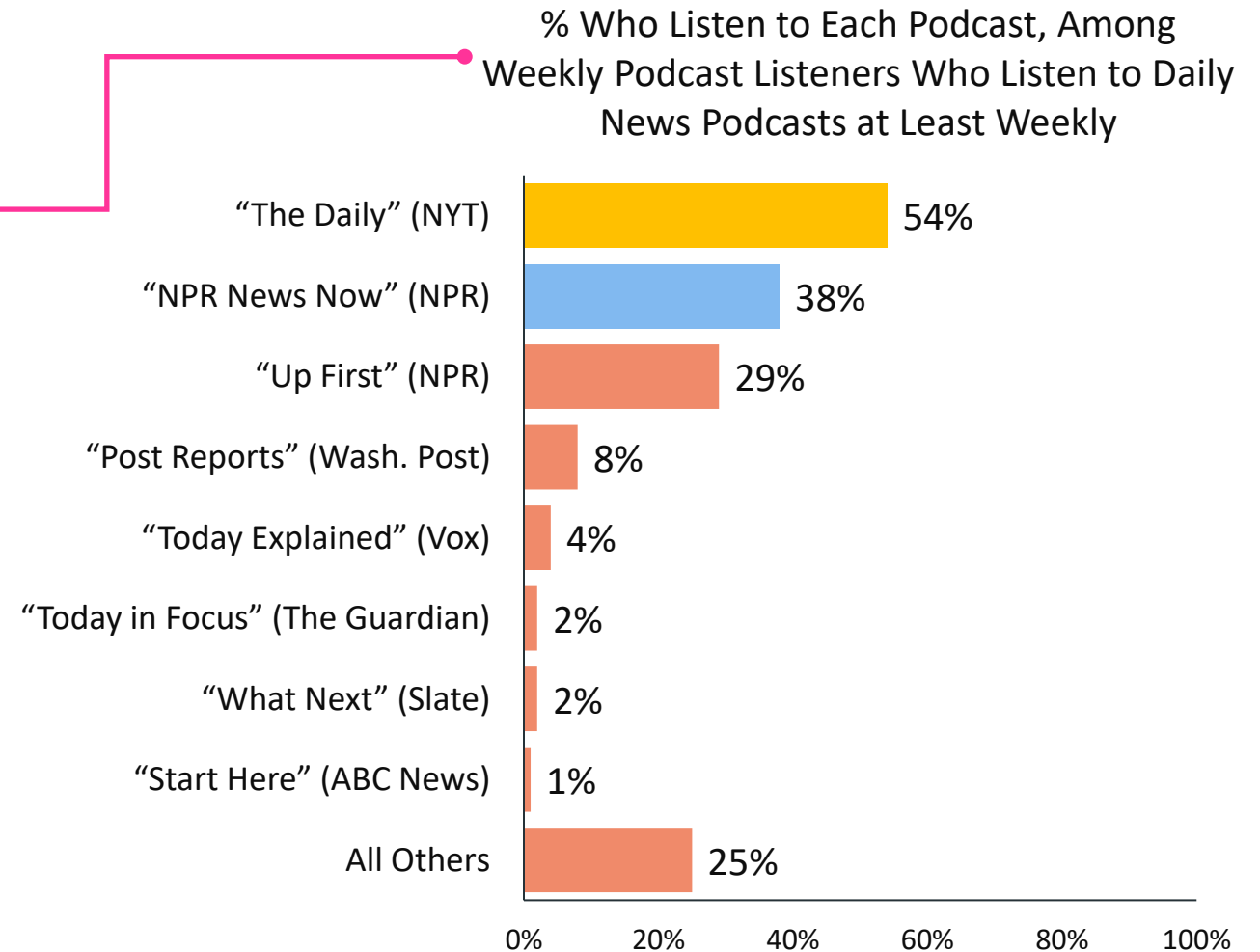
Among Weekly Podcast Listeners, % Who Listen to Daily News Podcasts at Least Weekly



A Majority of Daily News Podcast Users Listen to “The Daily” At Least Weekly, Followed by “NPR News Now”

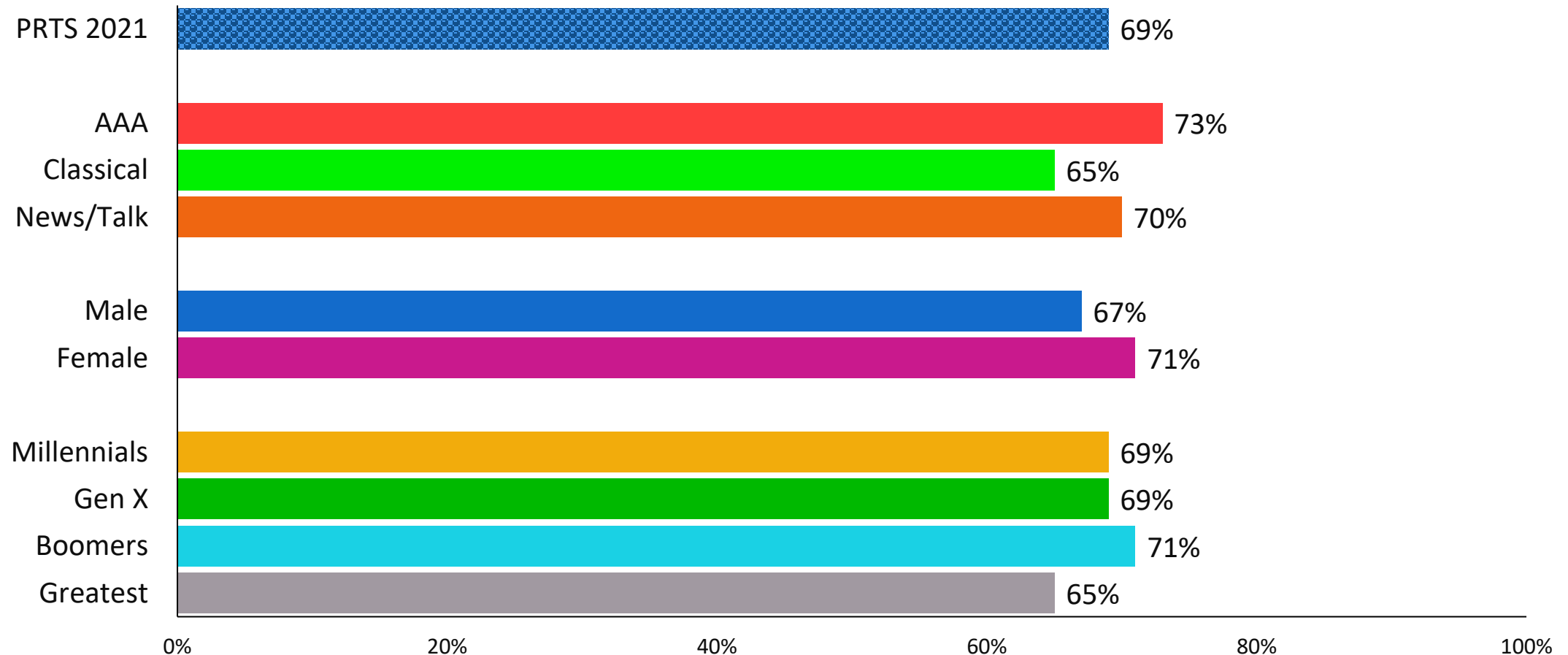


“Which of the following daily news podcasts -- featuring news and headlines each morning -- do you listen to at least once per week or more often?”



Nearly Seven In Ten Read Online Newsletters Featuring Coverage of Their Local Areas/Regions

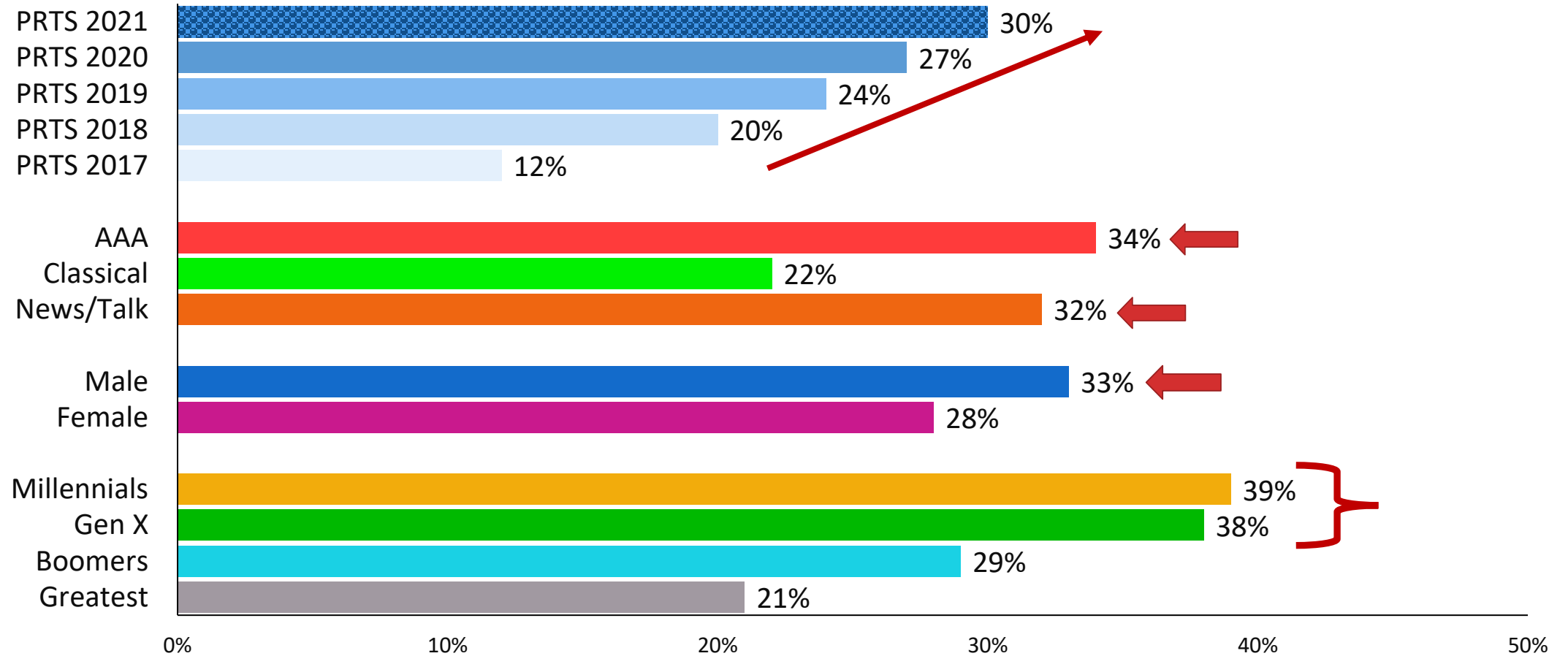
% Who Ever Read Online Newsletters That Provide News on the Area/Region in Which They Live





Smart speaker ownership is on the rise and listening to radio is the #1 use case.

Three in Ten Now Own a Smart Speaker, With Younger Generations Leading the Way

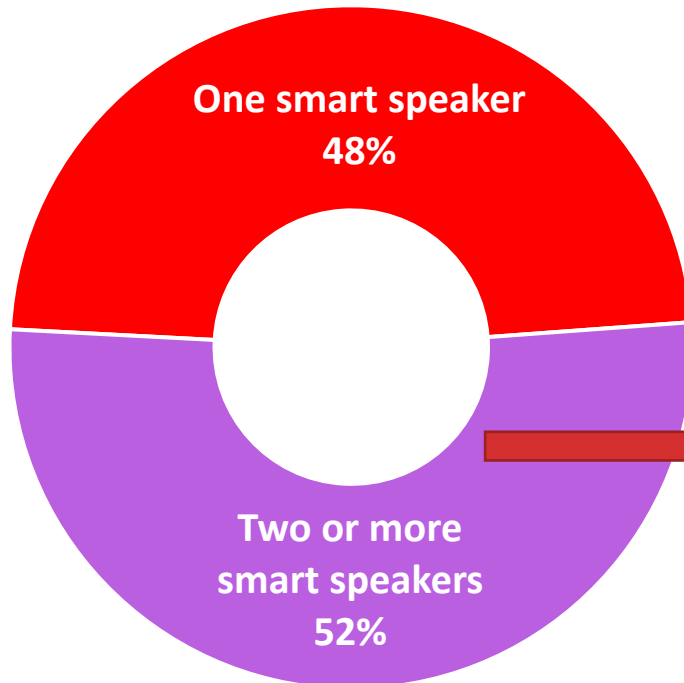


% who own a smart speaker (Amazon Alexa, Google Nest Audio/Home, etc.)

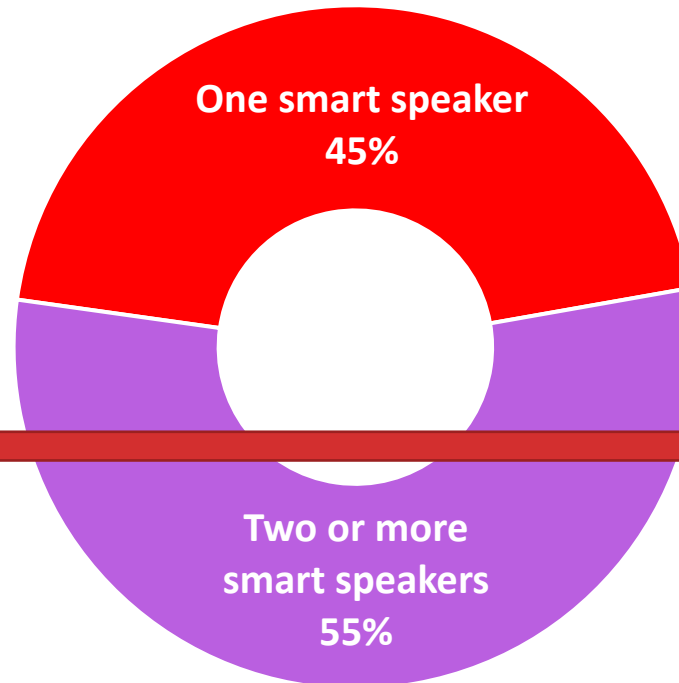
Nearly Two in Three Smart Speaker Owners Now Have Two or More of These Voice-Controlled Devices

% of Smart Speaker Owners Who Own...

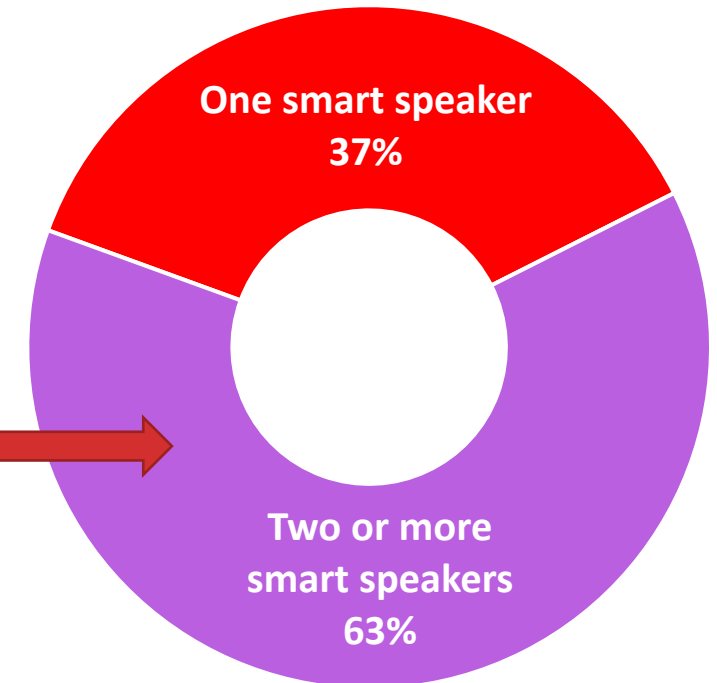
PRTS 2019



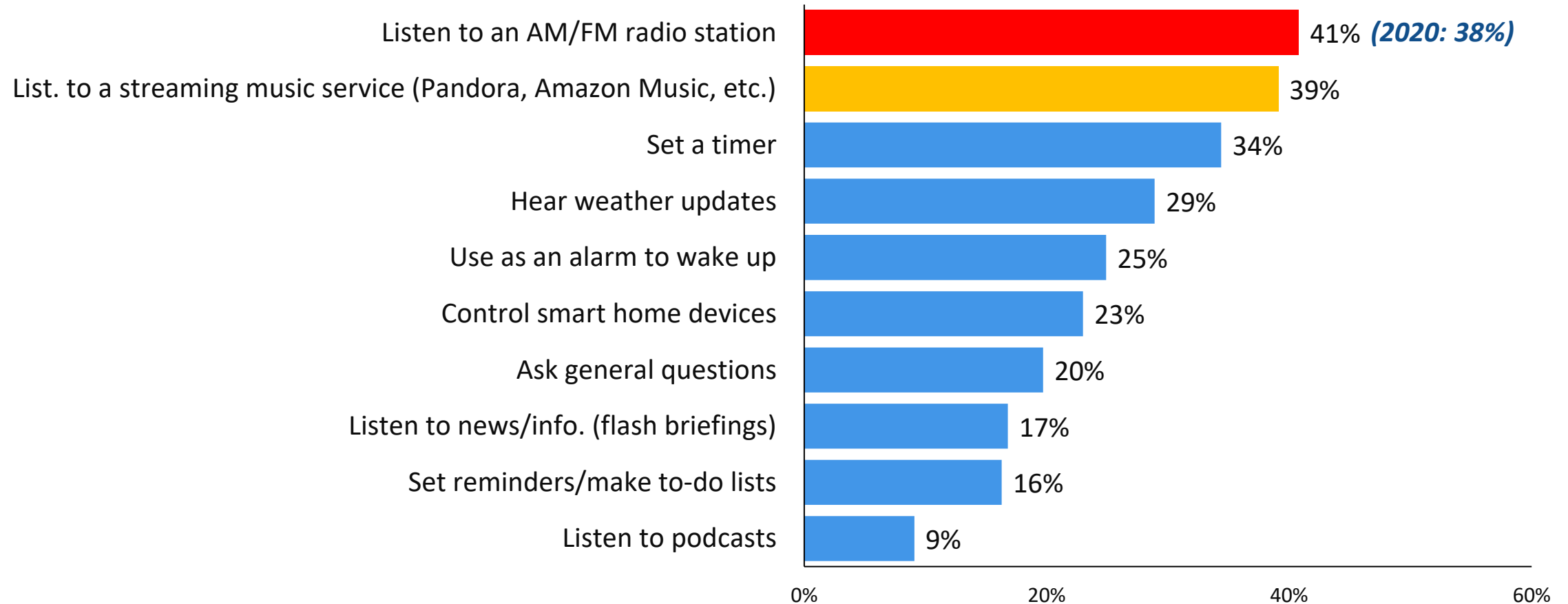
PRTS 2020



PRTS 2021

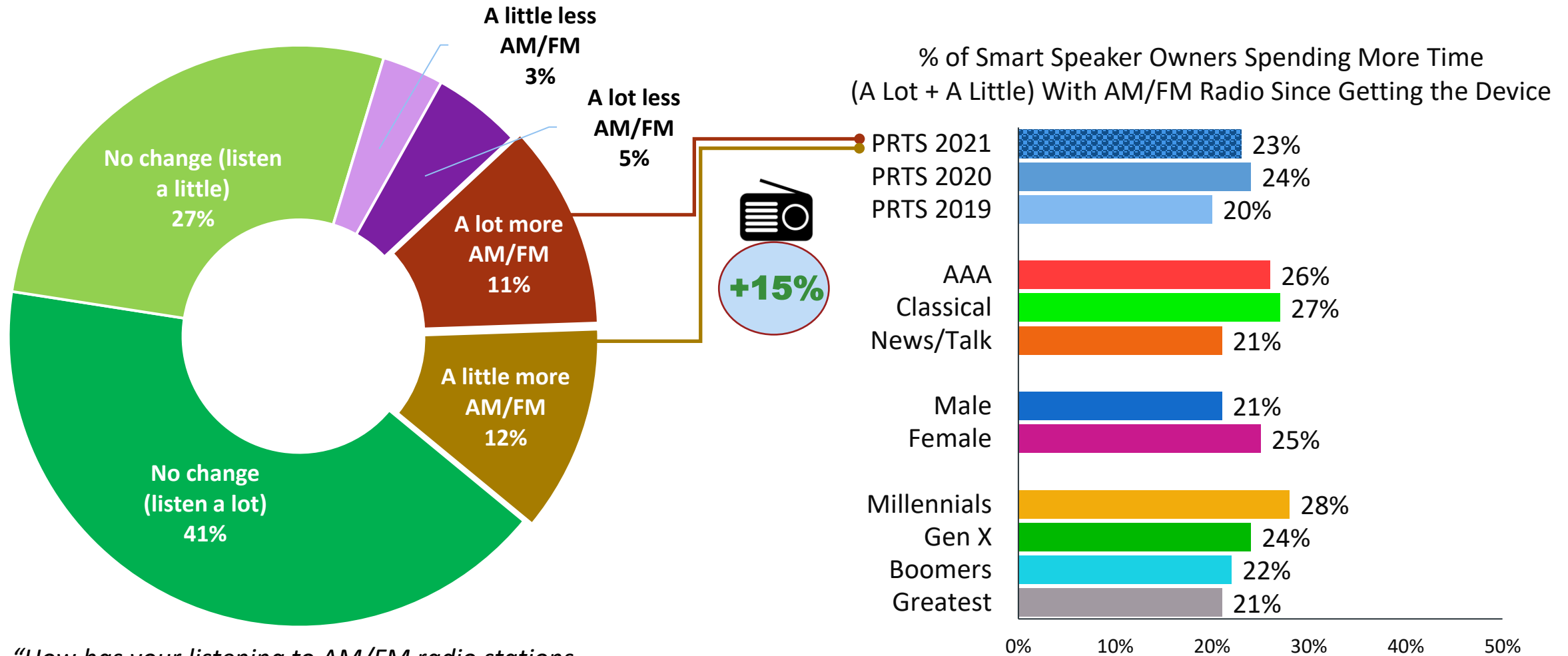


Listening to AM/FM Radio Stations and Streaming Music Services Are the Top Uses for Smart Speakers



% of smart speaker owners who “frequently” use their device(s)
in each way (most mentioned uses; 9% or more)

Nearly One in Four Smart Speaker Owners Reports Spending More Time Listening to AM/FM Radio Stations Since Getting the Device

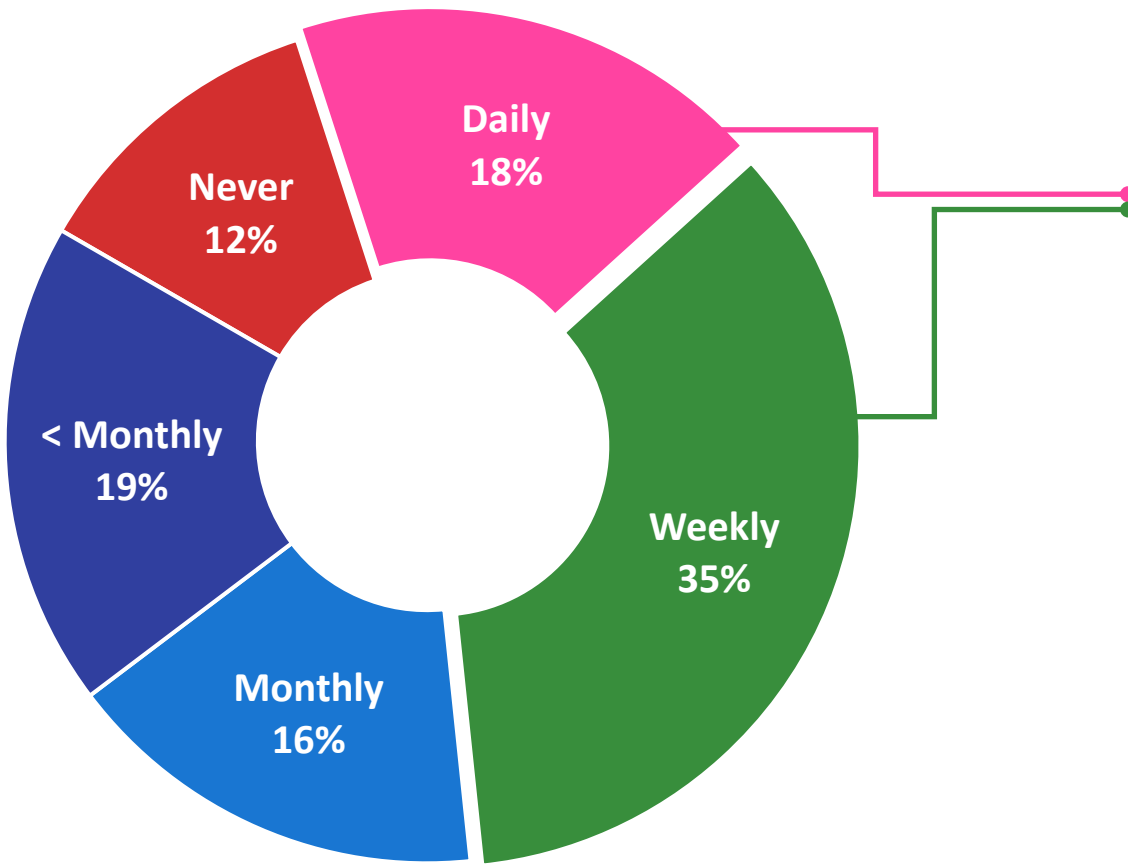


"How has your listening to AM/FM radio stations changed overall since you got a smart speaker?"

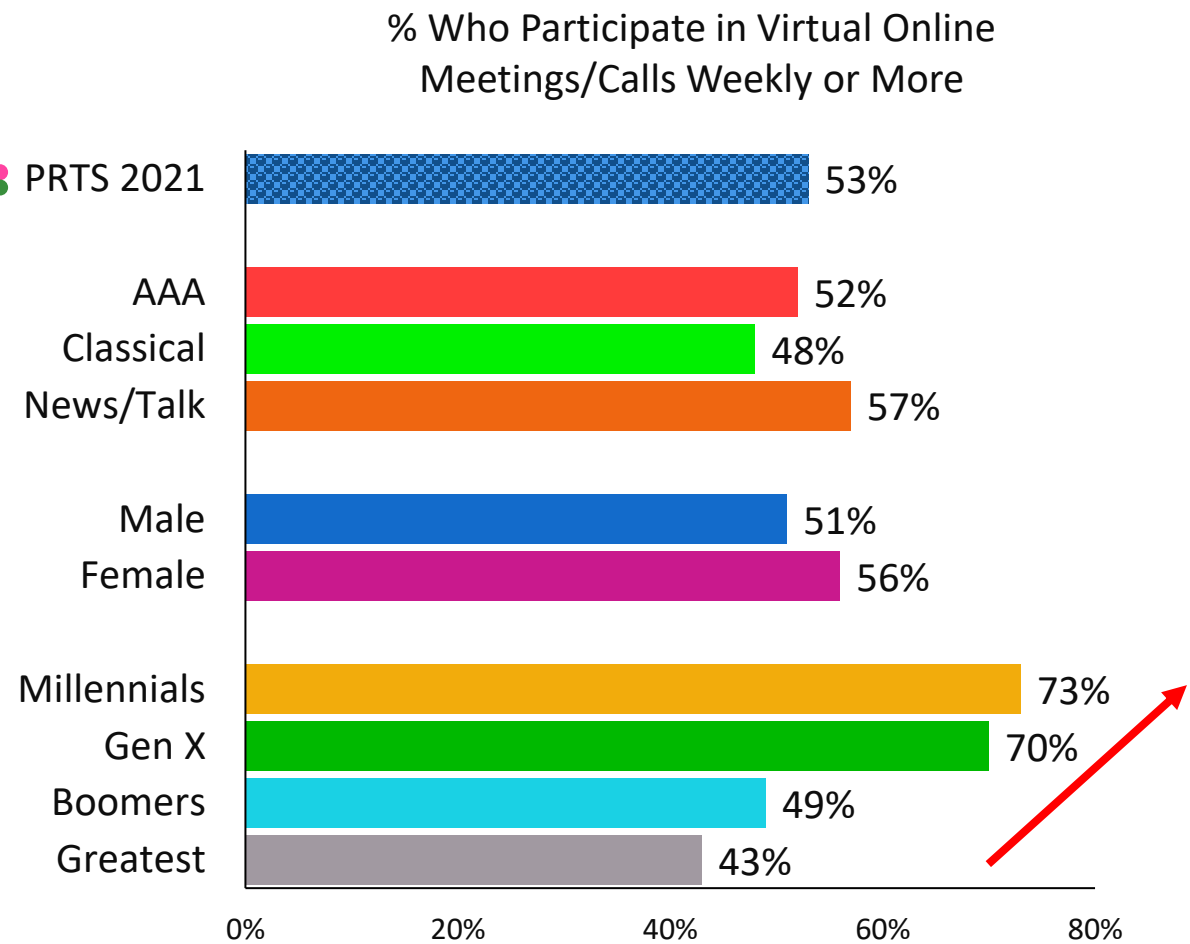


A popular way to
connect during
COVID:
Virtual meetings
and gatherings

More Than Half Participate in Virtual Meetings/Calls Weekly or More Often – Especially Progressively Younger Listeners

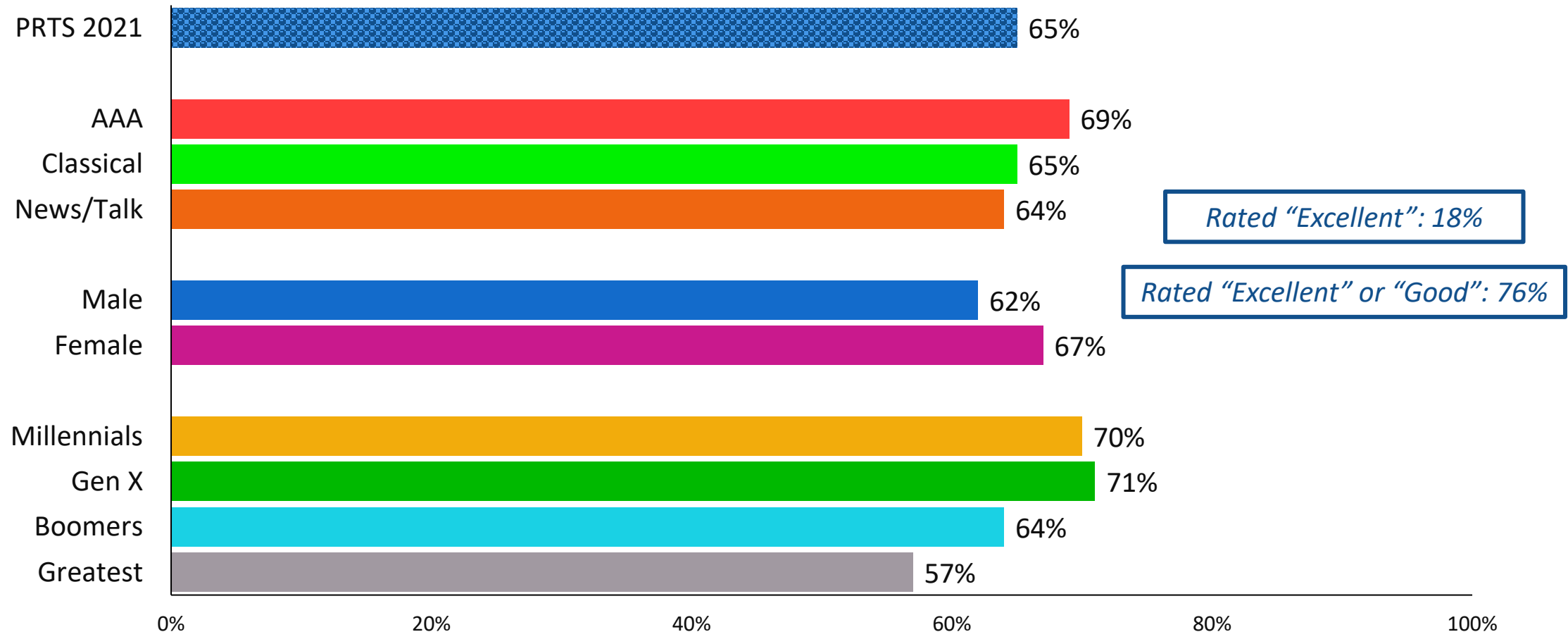


“How often do you participate in virtual online meetings/gatherings/calls on video-chat platforms like Zoom or Google Meet?”



Nearly Half Have Watched Free or Paid Live Video Streams Online

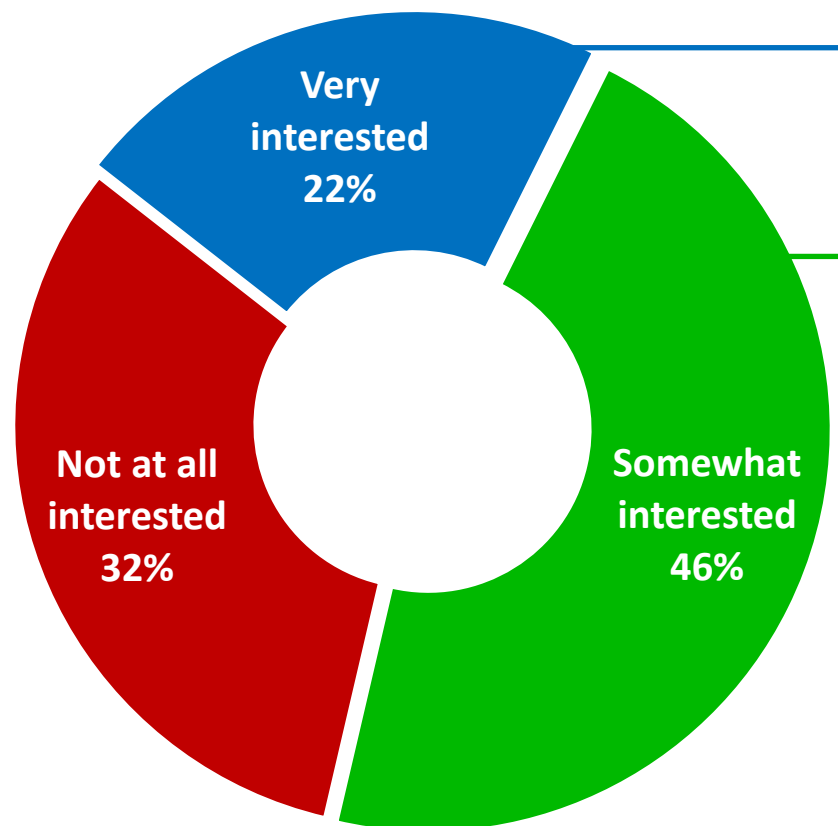
% Who Have Ever Watched Any Free/Paid Live, Online Video Streams (Concerts, Plays, Artist Interviews, Other Events, etc.)



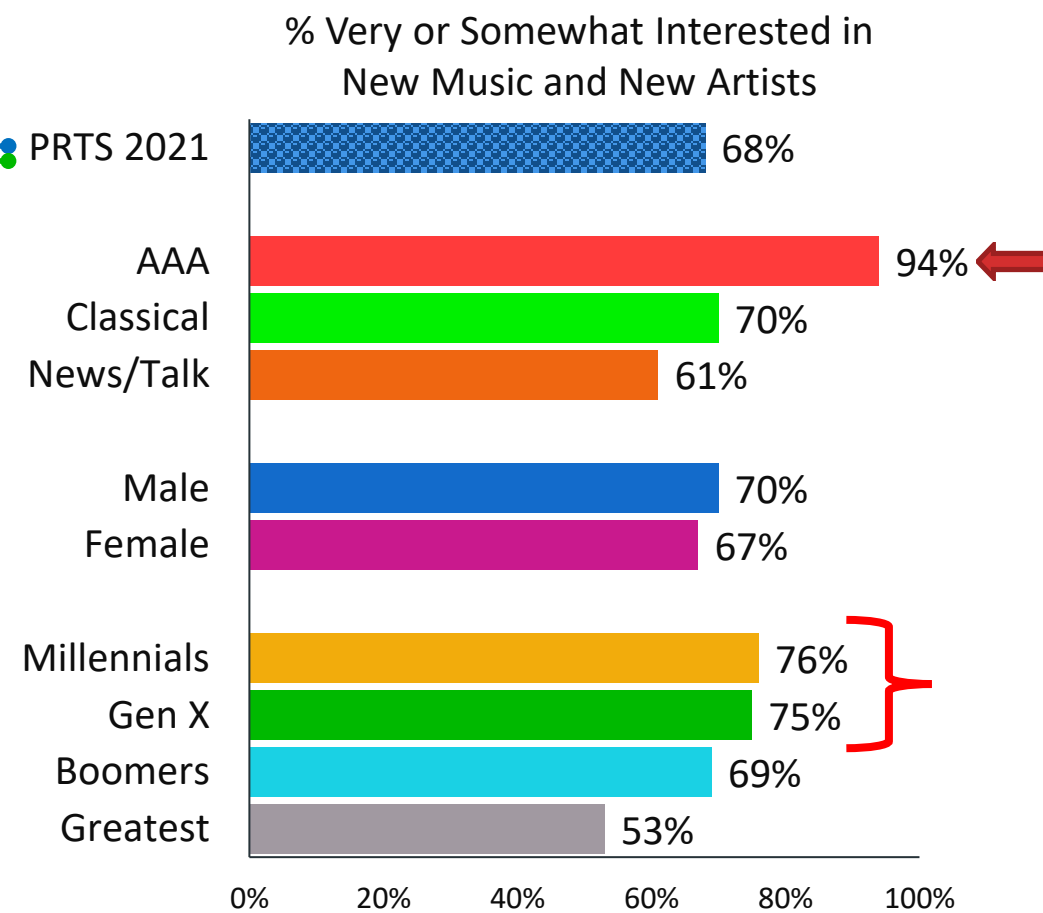


**Public Radio is
still the top
source for music
discovery,
especially among
Triple A fans.**

Two in Three Are At Least Somewhat Interested in New Music/ New Artists, Particularly Younger Generations and Triple A Fans

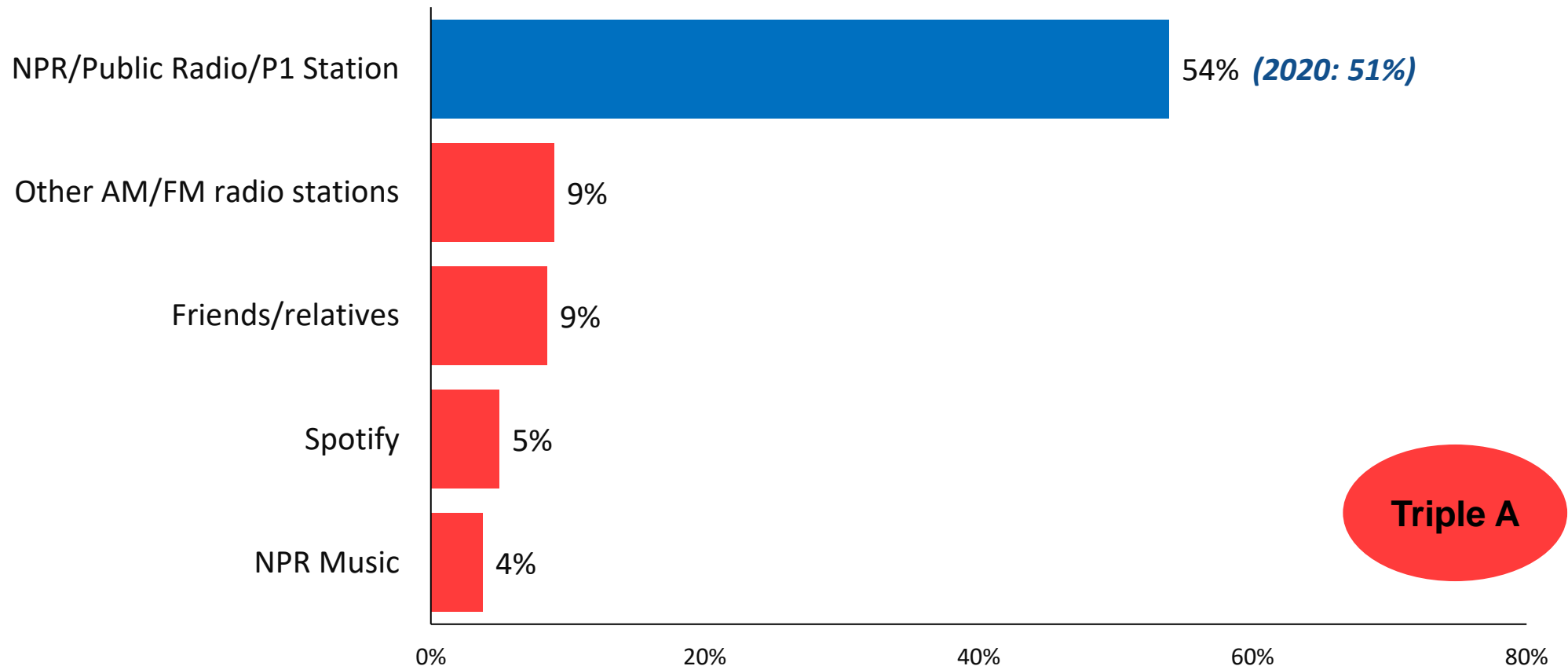


"How interested are you in finding out about new music and new artists?"



Among Triple A Fans, Broadcast Radio Dominates New Music/New Artist Discovery, and Is Trending Up

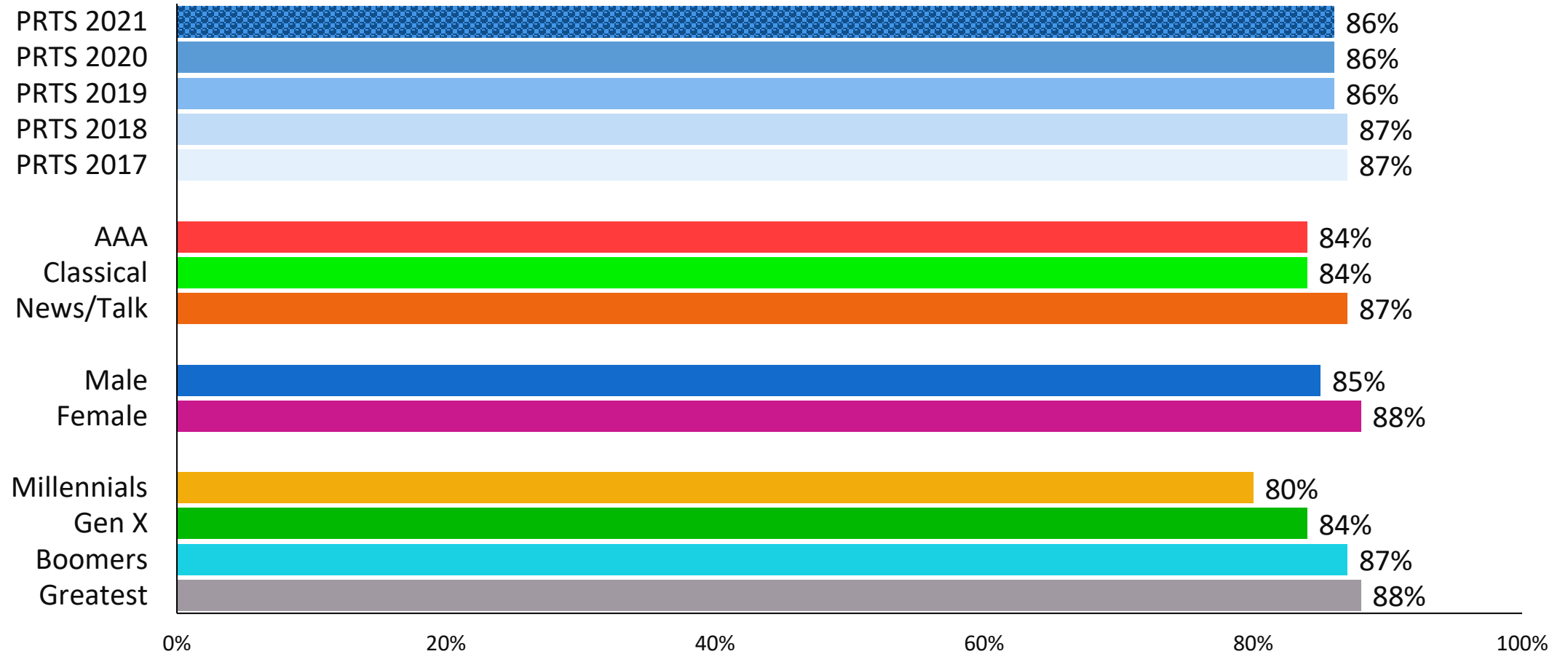
“What is your primary source for finding out about new music & new artists?”



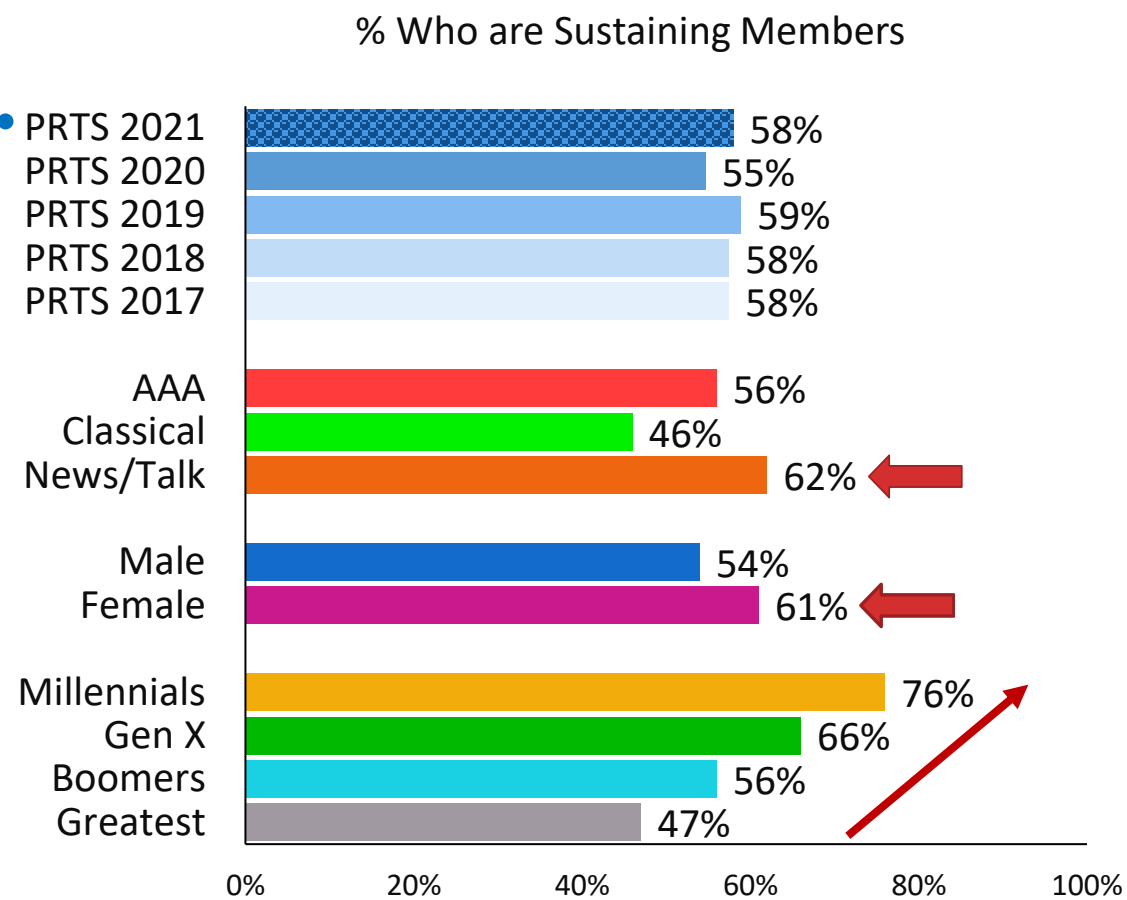
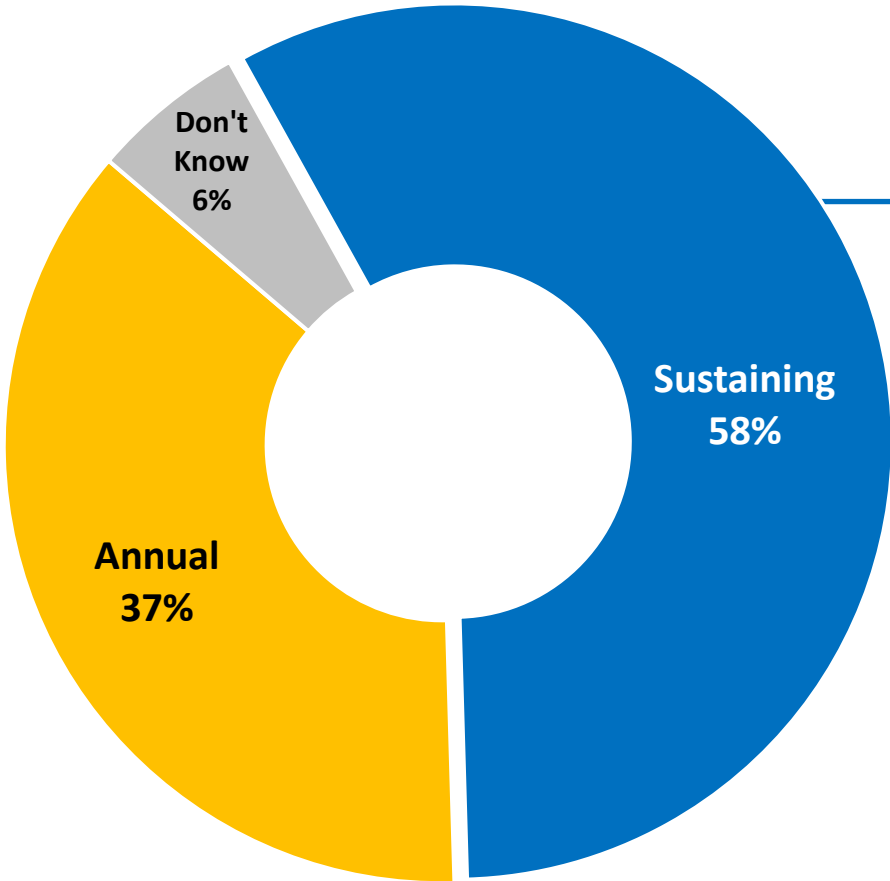


Membership and fundraising are consistent with past years, and the percentage of “sustainers” has returned to pre-COVID levels.

Station Membership Remains Very Consistent Across the Board



Sustaining Membership Has Returned to Pre-COVID Levels, Best Among Millennials, Gen Xers, Females, and News/Talk Fans



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