

# Jacobs Media's 9<sup>th</sup> Annual Public Radio Techsurvey

## Executive Summary

The challenge of tracking public radio listeners -- as the media and technology world is roiled by change -- is the central purpose of Jacobs Media's Public Radio Techsurveys. For the past nine years, the Public Radio Program Directors have partnered with Jacobs Media to produce research that guides the system's programmers, marketers, and managers as they face a future filled with challenges and opportunities.

**Study sample and methodology:** Across the U.S., 40 public radio stations participated, delivering 16,706 respondents. Most respondents are members of station email databases. Some responses were gathered via the station's website or social media pages. All responses were collected online and weighted by market size. The results do not represent all public radio listeners nor each station's total audience.

**Survey dates:** May 10 to June 7, 2017

Among the extensive findings, the following are key highlights:

- 1. There is continued public radio listening momentum.** Overall radio listening remains strong, with about nine in ten (89%) respondents in the total sample reporting listening to broadcast radio one hour a day or more (compared to 88% in last year's PRTS8 study). As seen one year ago, public radio listening momentum continues as one-fifth (20%) say they're listening to more public radio in the past year, while only 8% indicate they're listening less. Millennial listening shows plenty of momentum, with 37% saying they're listening to public radio more in the past year (vs. only 9% listening less).
- 2. The core values are intact.** For the total sample, more than half say key drivers supporting public radio listenership include credible and objective programming, learning new things, being informed, a deeper news perspective, respect for the listener's intelligence, and a balanced perspective.
- 3. The 2016 election has been a key driver to increased listening.** Nearly four in ten (38%) agree the Presidential race and its outcome has led to an increase in their public radio consumption (nearly double the 21% who said this was the case in last year's PRTS8 study). This is especially true among Millennials with one in every two saying the election is driving their increased public radio listening.

- 4. Emotional reaction and news fatigue are having a small but important effect.** Among the small number (8%) who report listening to public radio less in the past year, depressing news and needing a break from the news were the most cited (non-lifestyle related) reasons for this change in their listening patterns.
- 5. Smartphone penetration is nearly ubiquitous.** Across the entire sample, the mobile revolution kicks into an even higher gear. Nearly nine in ten (88%) own a smartphone (98% among Millennials). About one-third (32%) admit being “addicted” to their mobile phones, which is particularly true among Millennials (58%).
- 6. Digital listening is on the rise.** More than six in ten (63%) listen to any type of streaming audio/radio on a weekly basis (compared to 54% one year ago in PRTS8), with 42% doing so daily. Millennials index even higher for streaming radio usage, with more than eight in ten listening weekly (81%), and 60% listening daily.

More than one-quarter of reported public radio listening (28%) occurs on digital platforms (streaming, podcasts, etc.) – which is up from 24% in PRTS8 (and nearly a 50% increase from the 19% digital consumption seen two years ago in PRTS7). Comparatively, 69% report their public radio listening takes place on an AM/FM radio at home, work, school or in a vehicle (down from 74% one year ago in PRTS8). Among Millennials, 36% of reported public radio listening is via digital sources, with 61% occurring through traditional AM/FM radio sources.

- 7. TV on-demand is as popular as ever.** Overall, more than half the sample own a “smart” or connected TV (56%). Fully 42% say that all or most of their television viewing is on-demand. Fewer than half as many Millennials (36%) are pay cable or satellite TV subscribers, compared to the total sample (74%). More than twice as many Millennials have “cut the cord” with pay TV, in contrast to the overall sample (32% vs. 15%).

In addition, more than one-quarter of Millennials (28%) have never been a pay TV subscriber versus 10% of the entire sample. The net result of this shift in paid subscriptions to on-demand usage is exemplified by the finding that 44% of Millennials reporting all their TV viewing as time-shifted (compared with 14% of the total sample).

- 8. Podcast usage continues to be robust.** Almost half of PRTS9 respondents (47%) listen to podcasts or on demand audio monthly or more often, with younger generations of listeners and News/Talk partisans indexing even higher. A large majority of Millennials listens to podcasts monthly (79%), with more than one-third (37%) accessing on-demand content on a daily basis. Regular podcast listeners enjoy listening most to radio shows that previously aired, as well as podcasts that are news, current events, or politics related. Other topics of interest among monthly podcast users include society and culture, science, music, and comedy.

- 9. Millennials will continue to impact the public radio landscape.** More so than older generations, Gen Y public radio listeners are more likely to access news from digital sources rather than radio. They are also less likely to own a radio where they live. Millennials are especially likely to interact with their favorite public radio station via podcasts and mobile apps. Most also wake up with their mobile phone, rather than a traditional clock radio.
- 10. Facebook continues to dominate social media usage.** Eight in ten (79%) have a social media profile. Among this group, 91% have a Facebook page, and the majority (66%) check it at least daily. Among Millennials, social media usage is nearly universal, as 96% have a social media profile.
- 11. Sustainers outnumber annual givers.** Among the entire sample, nearly nine in ten (87%) are station members. Among station members, 58% are sustaining members, while nearly eight in ten (78%) Millennial station members opt for the convenience of monthly giving.
- 12. NPR One trends higher.** About one-fifth (19%) of smartphone/tablet owners who have downloaded radio or music-centric apps have downloaded NPR One (nearly double the 11% who had done so one year ago in PRTS8). Downloads run even higher among Millennials at 30%. Among all NPR One users, more than one-third (35%) use the app weekly or more frequently, and most (86%) give the app an “excellent” or “good” rating. Three in ten NPR One users say they’ve been listening more to public radio in the past year (vs. 20% of the total sample).
- 13. More connected cars.** About two-thirds (64%) of those who spend time in a vehicle can connect a mobile phone in their car. Overall, 18% own a “connected car” – up from PRTS8’s 15%. Of these, 58% say they “love” or “like” these dashboard systems (down from 69% one year ago, suggesting some of the luster has worn off). And by a nearly 3:1 margin, “connected car” owners say they have been listening more to public radio in the last year – 21% versus 8% saying they have been listening less.
- 14. The next car.** Overall, 14% say they plan to buy or lease a new vehicle this year (or had already purchased one in 2017). The vast majority of prospective new car owners say the most important feature is an AM/FM radio (88%), followed by Bluetooth (66%) and a smartphone connector (58%).
- 15. Sharing and recommending.** More than one in three (35%) say they share content they see online (email, social media, website, etc.) on a frequent basis, especially women. Public radio’s Net Promoter recommendation scores continue to be excellent, as well as consistent throughout the nine years PRTS studies have been conducted. Women and Millennials are especially likely to recommend their favorite public radio stations to others.

### Key Trends:

- Public radio's health remains strong, with digital platforms continuing to play a larger role in overall listening.
- The 2016 election aftermath continues to represent a growth opportunity for public radio, especially among News/Talk devotees. However, the key will be to sustain new listenership while avoiding "news burnout."
- Millennials are different, which both represents a huge challenge and a major opportunity. They are more frequent users of digital platforms and are voracious consumers of on-demand content. Millennials are the most positive about public radio programming, strongly supporting public radio core values like learning.
- Podcasting is clearly a solid growth opportunity, closely connected to the explosion of video on-demand consumption. Millennials continue to be the biggest users by far.
- Mobile penetration is nearly universal, and overall digital platform usage continues to trend higher. Smartphone apps are the pathway to reaching and connecting with Millennials.
- As is the case for all of broadcast radio, the car represents the top radio listening location, but "connected cars" provide options that are used often at broadcast radio's expense.
- Sharing and recommendation scores are exceptional, providing public radio content creators with a strong opportunity to expand its boundaries and attract new users.