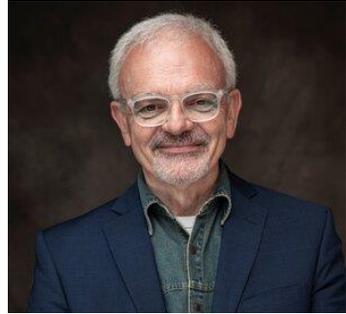


Jacobs
media strategies



PUBLIC RADIO
TECHSURVEY
2022 JACOBS MEDIA

The State of Public Radio in Post-Pandemic America



Methodology

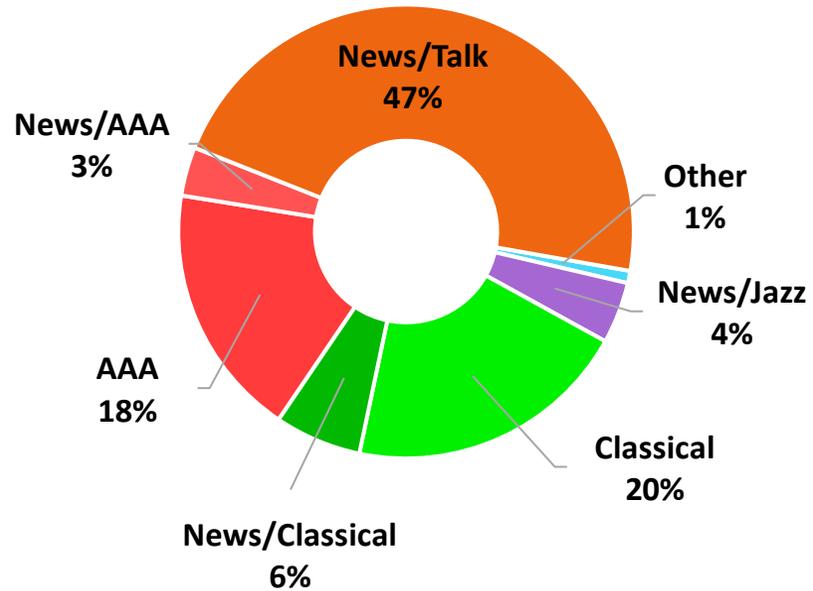
- 69 U.S. Public Radio stations
- N = 27,282
- Interview dates: June 7-July 10, 2022
- Most respondents are members of station databases. Some responses were gathered via station websites and/or social media pages.
- All responses were collected online and weighted using Nielsen 2022 market population 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.



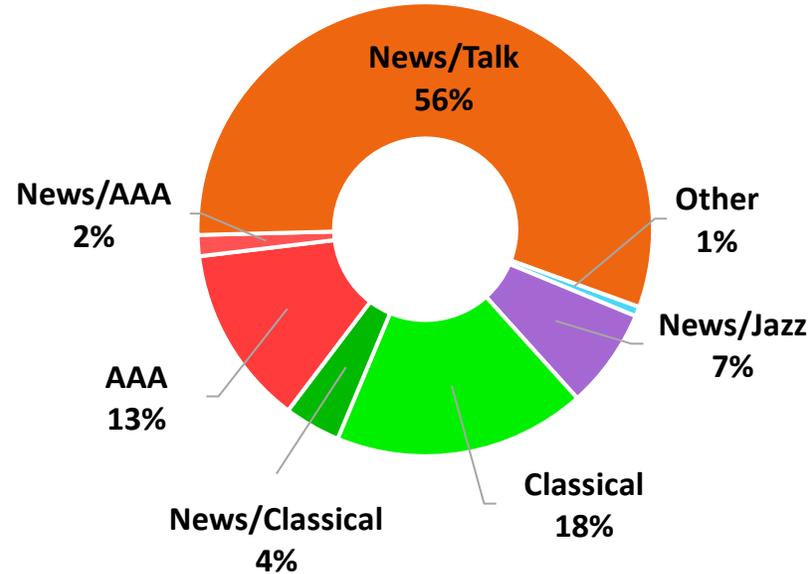
The Sample

Format Composition

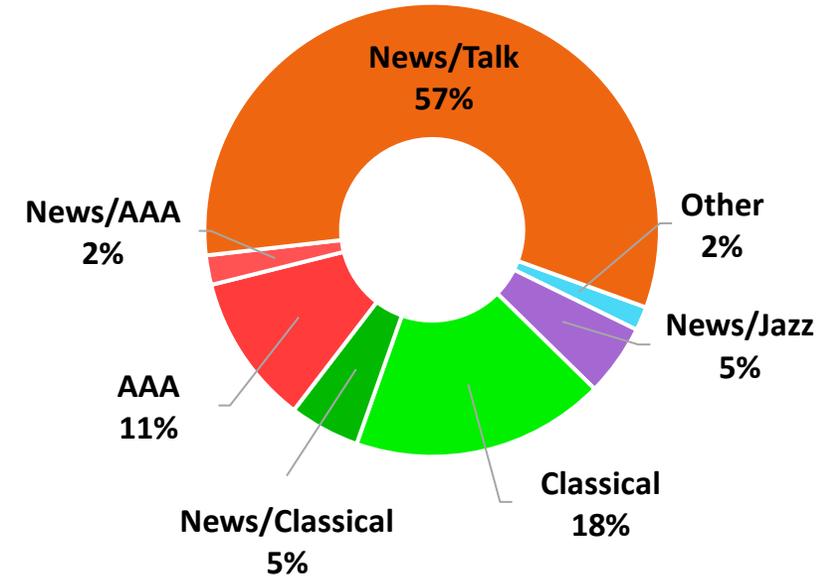
PRTS 2020



PRTS 2021

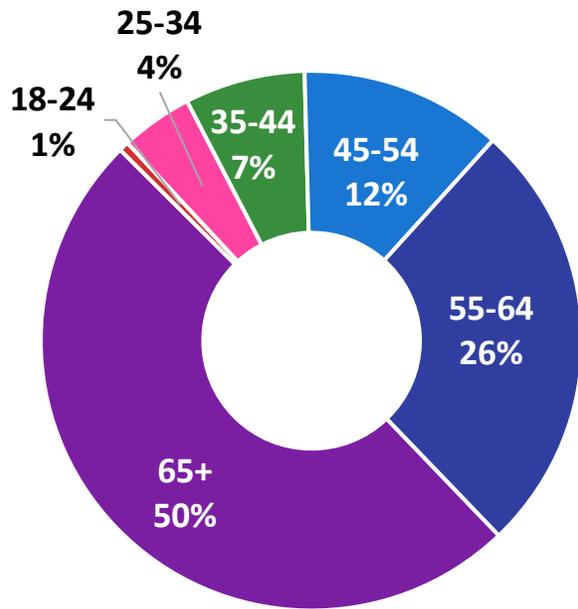


PRTS 2022



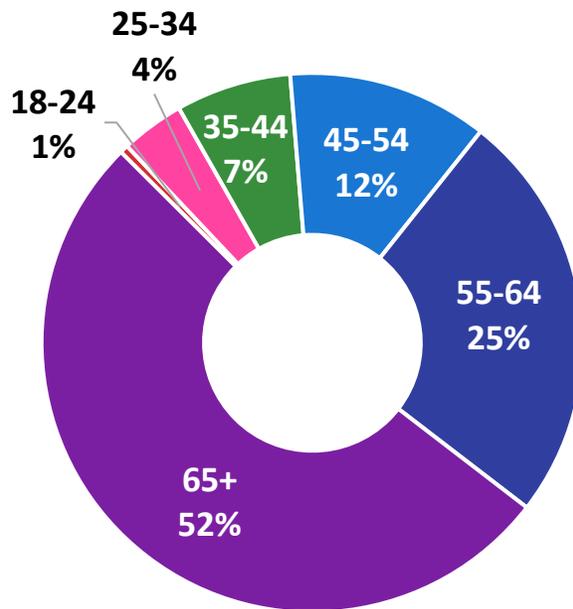
PRTS (and Public Radio) Continue to Age

PRTS 2019



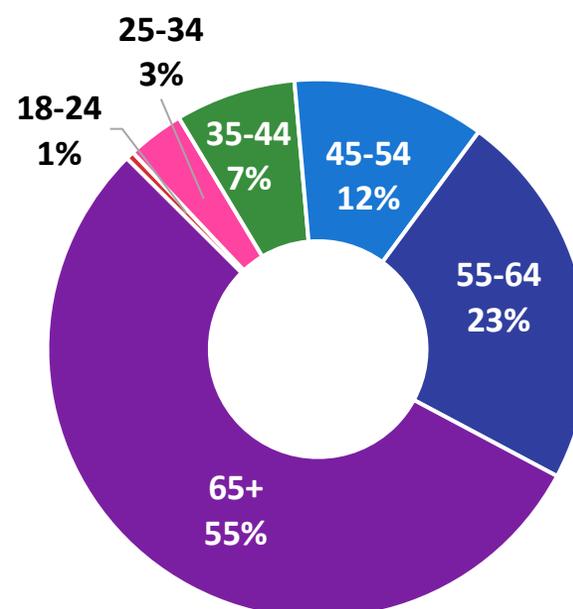
Average age: 61.8

PRTS 2020



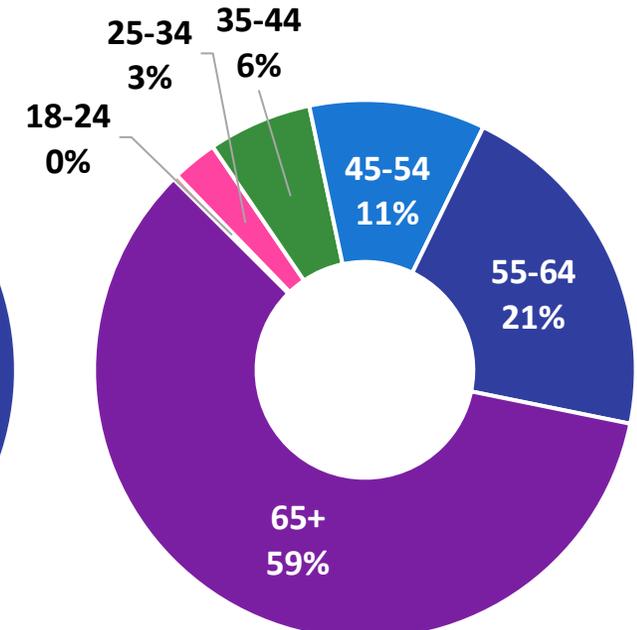
Average age: 62.5

PRTS 2021



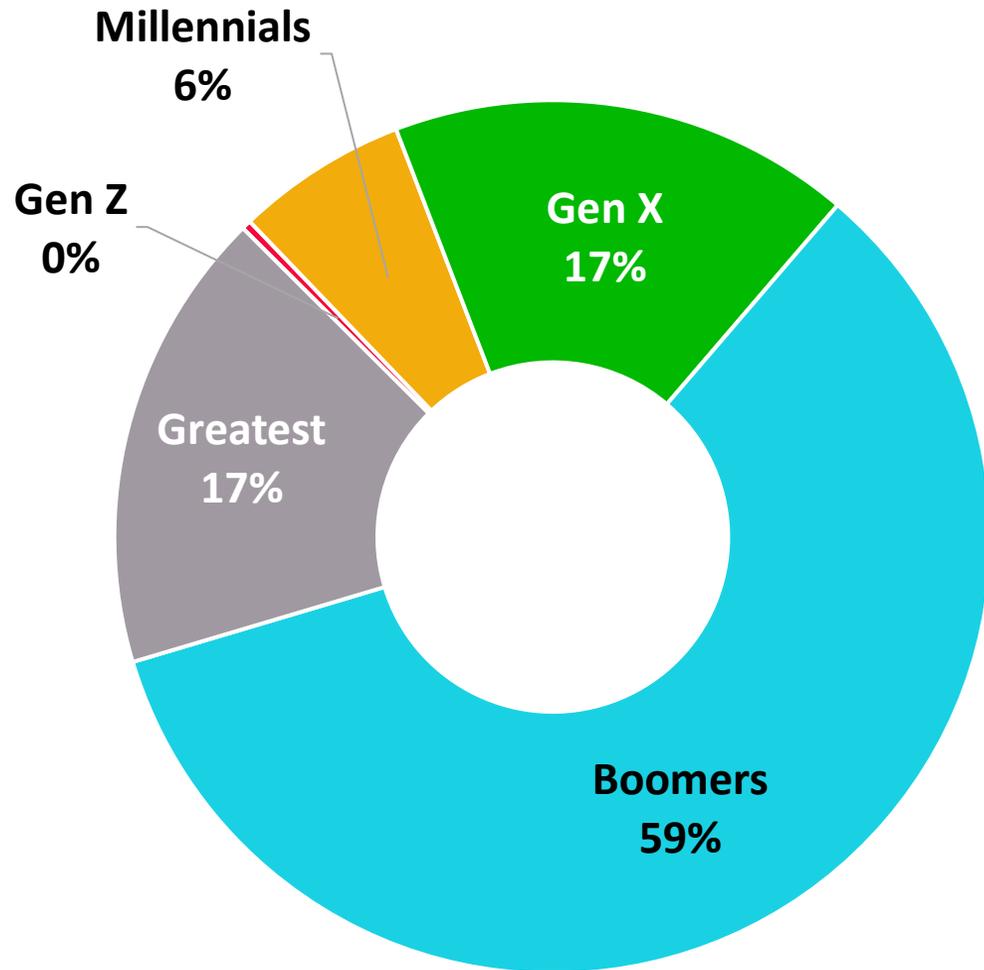
Average age: 63.3

PRTS 2022



Average age: 64.3

Generations



Millennials (born between 1981-1996)

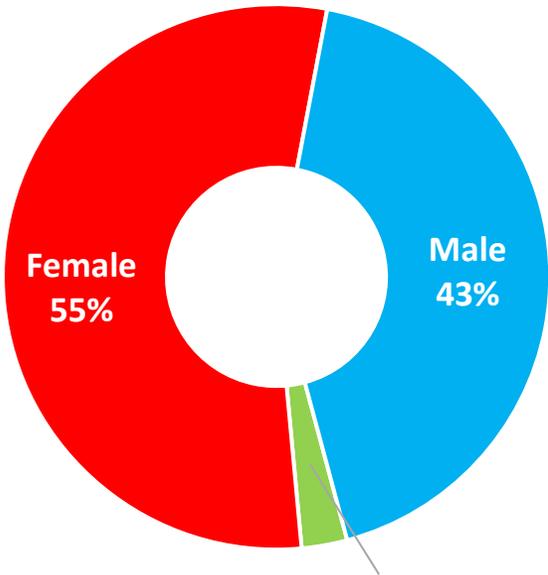
Gen X (born between 1965-1980)

Baby Boomer (born between 1946-64)

Greatest Generation (born before 1946)

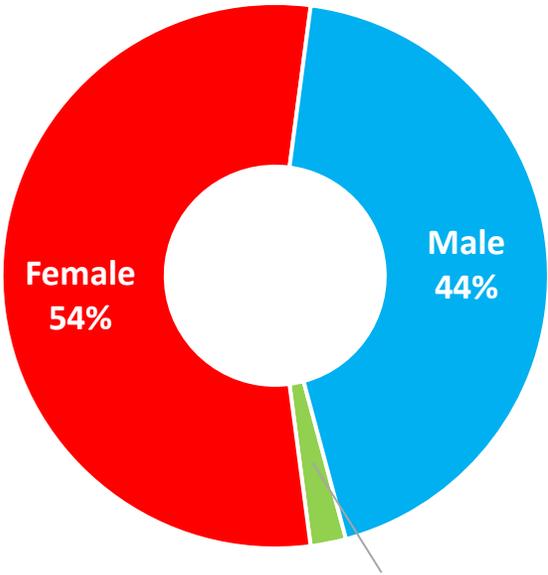
Gender

PRTS 2019



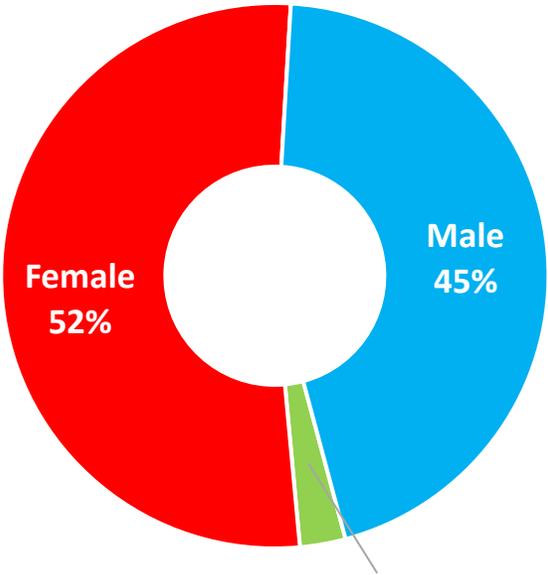
Non-Conforming/Prefer Not to Say 3%

PRTS 2020



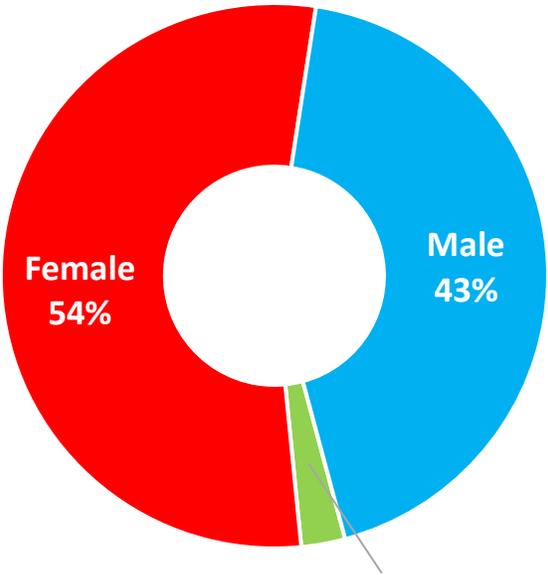
Non-Conforming/Prefer Not to Say 2%

PRTS 2021



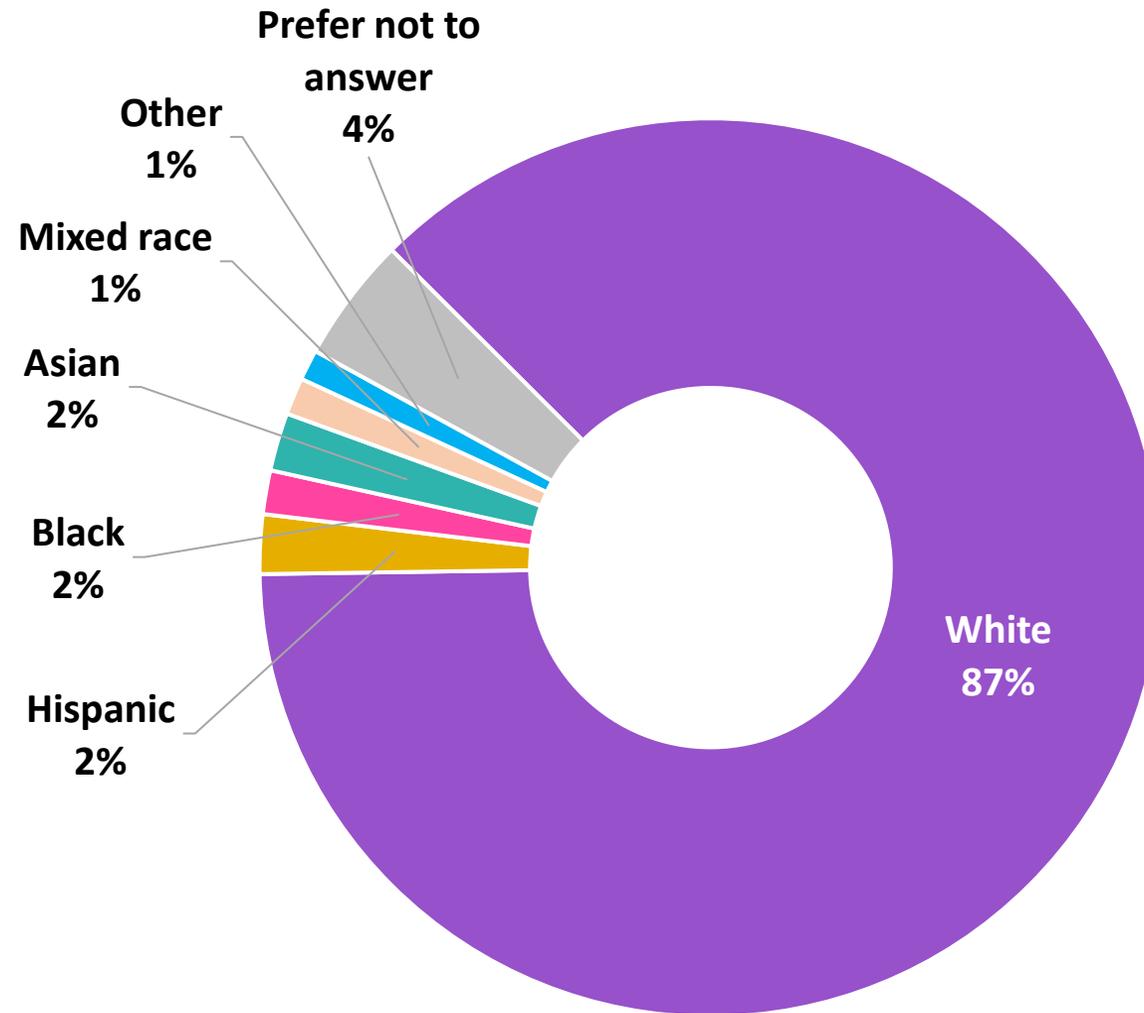
Non-Conforming/Prefer Not to Say 3%

PRTS 2022



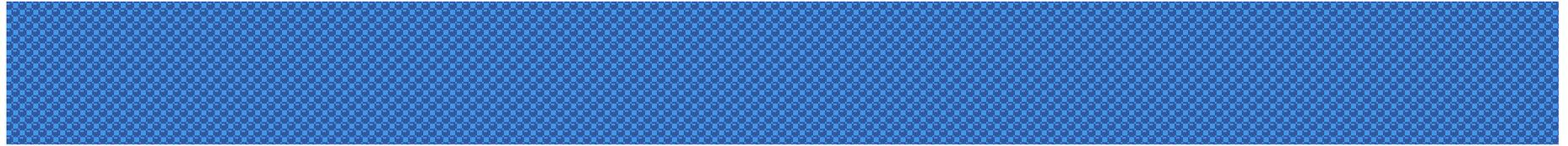
Non-Conforming/Prefer Not to Say 3%

Ethnicity



Format Key

PRTS 2022



AAA



Classical



News/Talk





Key Takeaways

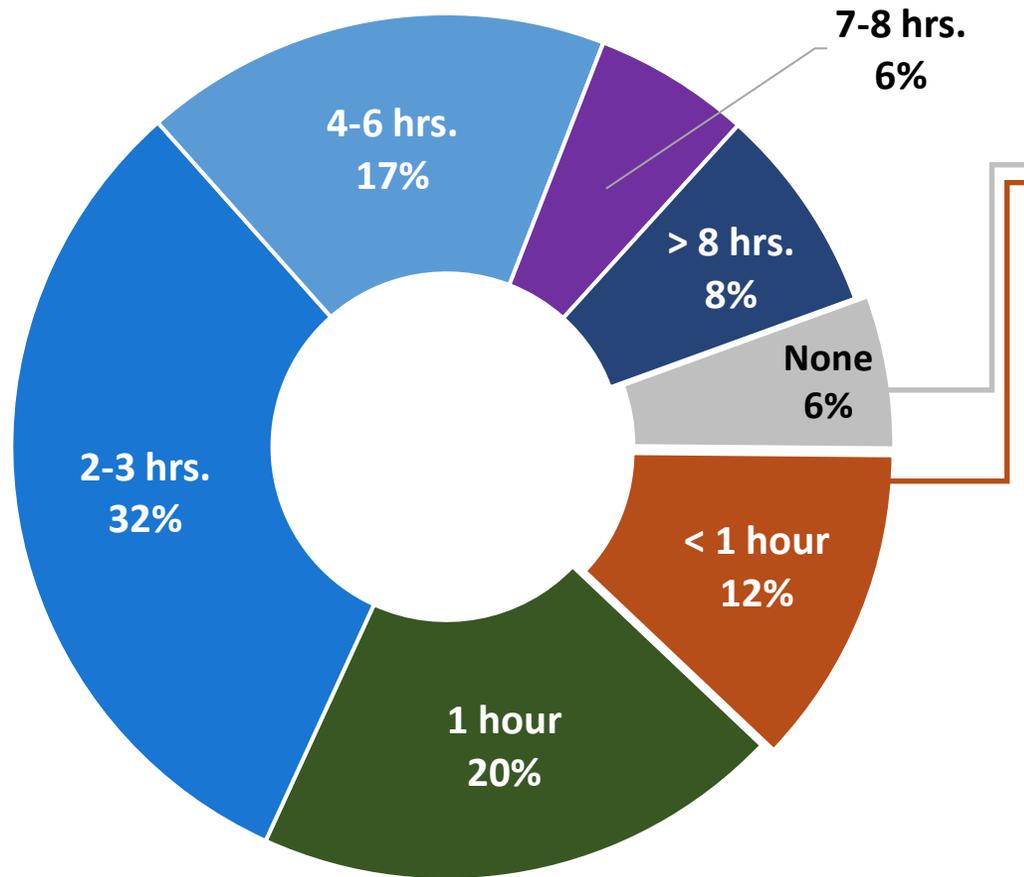
Key Takeaways

- The COVID recovery is accelerating but in-car listening is still “off.”
- Many of Public Radio’s vital signs are flat & momentum is down. The audience continues to age at a steady rate.
- Public radio “core values” are consistent and strong.
- Political news cuts both ways, stirring greater news interest but repelling, too.
- Public Radio’s “recommendation” scores continue to sag.
- Digital listening to Public Radio stations maintains steady levels.
- Alternative news sources – local daily news podcasts, newsletters – look promising.
- Podcasting continues to be a mixed bag, growing in popularity, but erosive to radio listening. Podcast commercials may be losing some of their impact.
- Online word games have become daily habits for many public radio fans.
- In-car listening has rebounded, but still below pre-COVID levels, while other dashboard options abound as more “connected cars” hit the road. Bluetooth rules!
- Smart speaker ownership has plateaued, but radio streaming is the #1 use case.

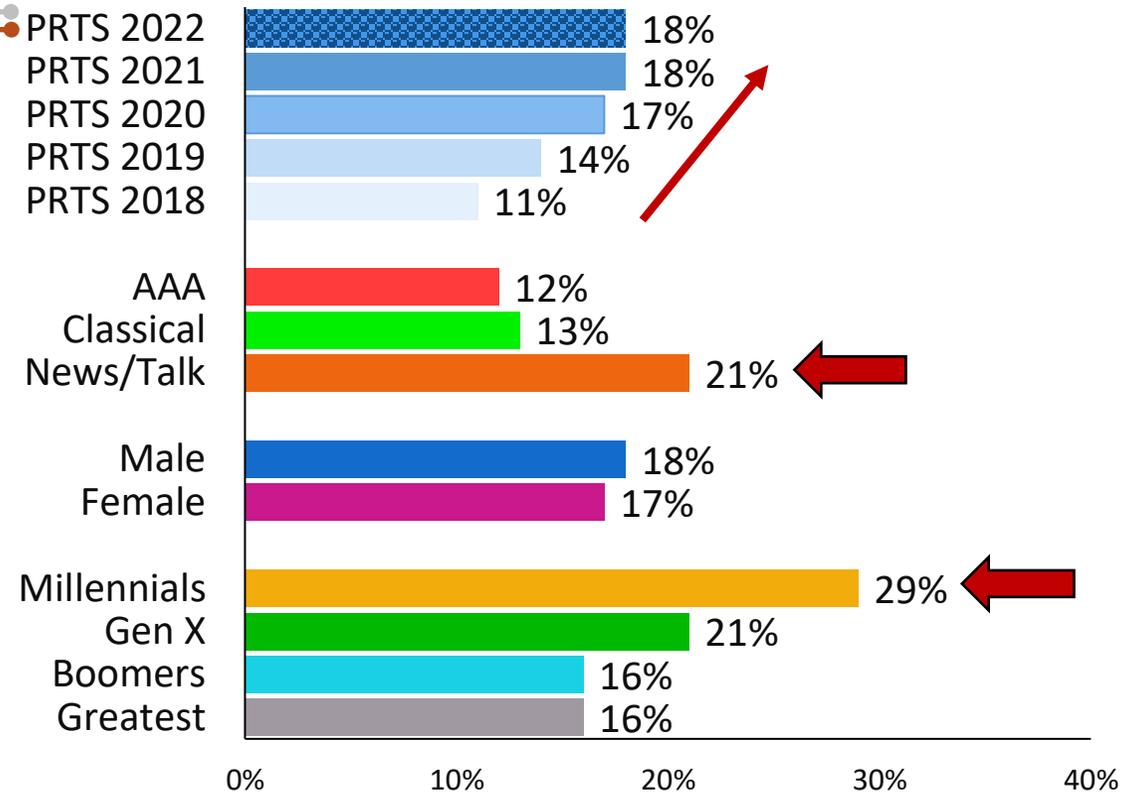


Radio listening is mostly stagnant at a time when “regular radios” are disappearing from Public Radio homes.

Nearly One-Fifth of Public Radio Fans Don't Listen to the Radio For One Hour a Day – Remaining Stable at Its Peak

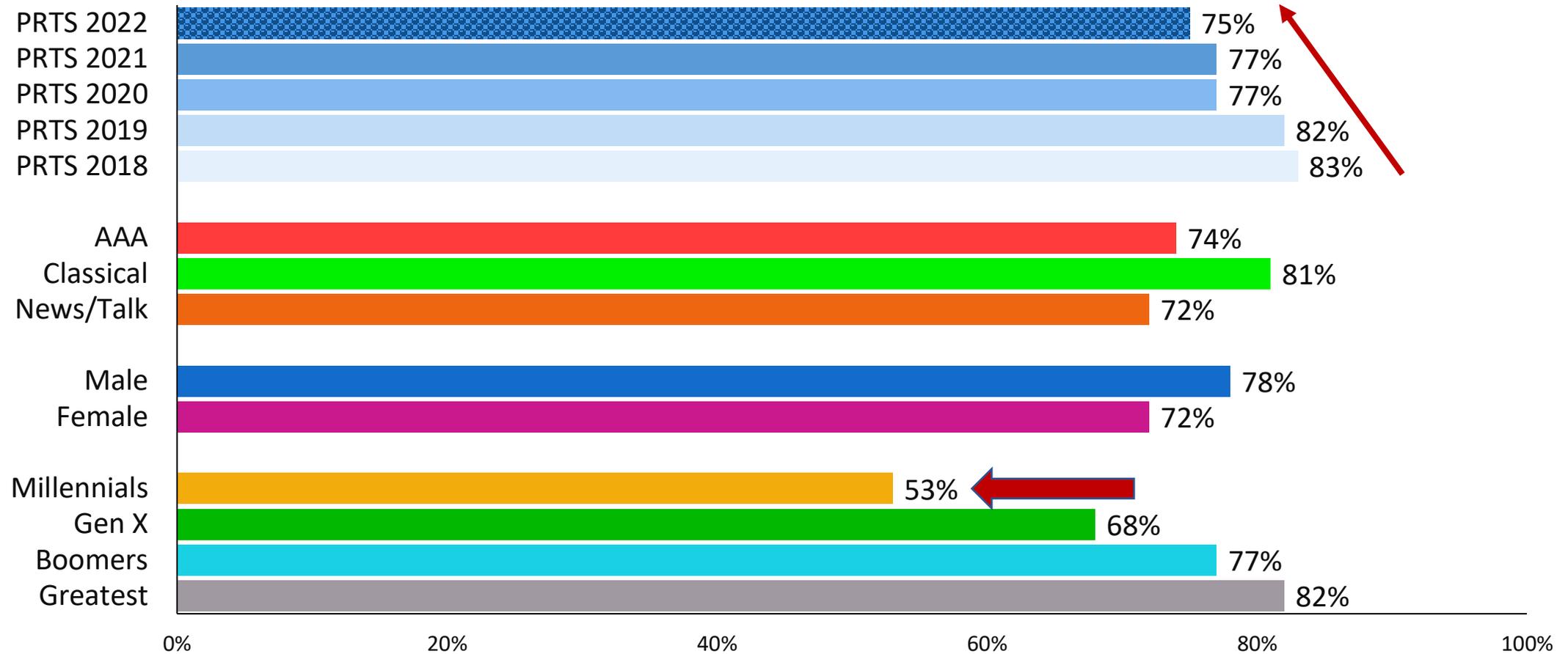


% Who Listen to AM/FM Radio (On Any Device) For One Hour or More Each Weekday



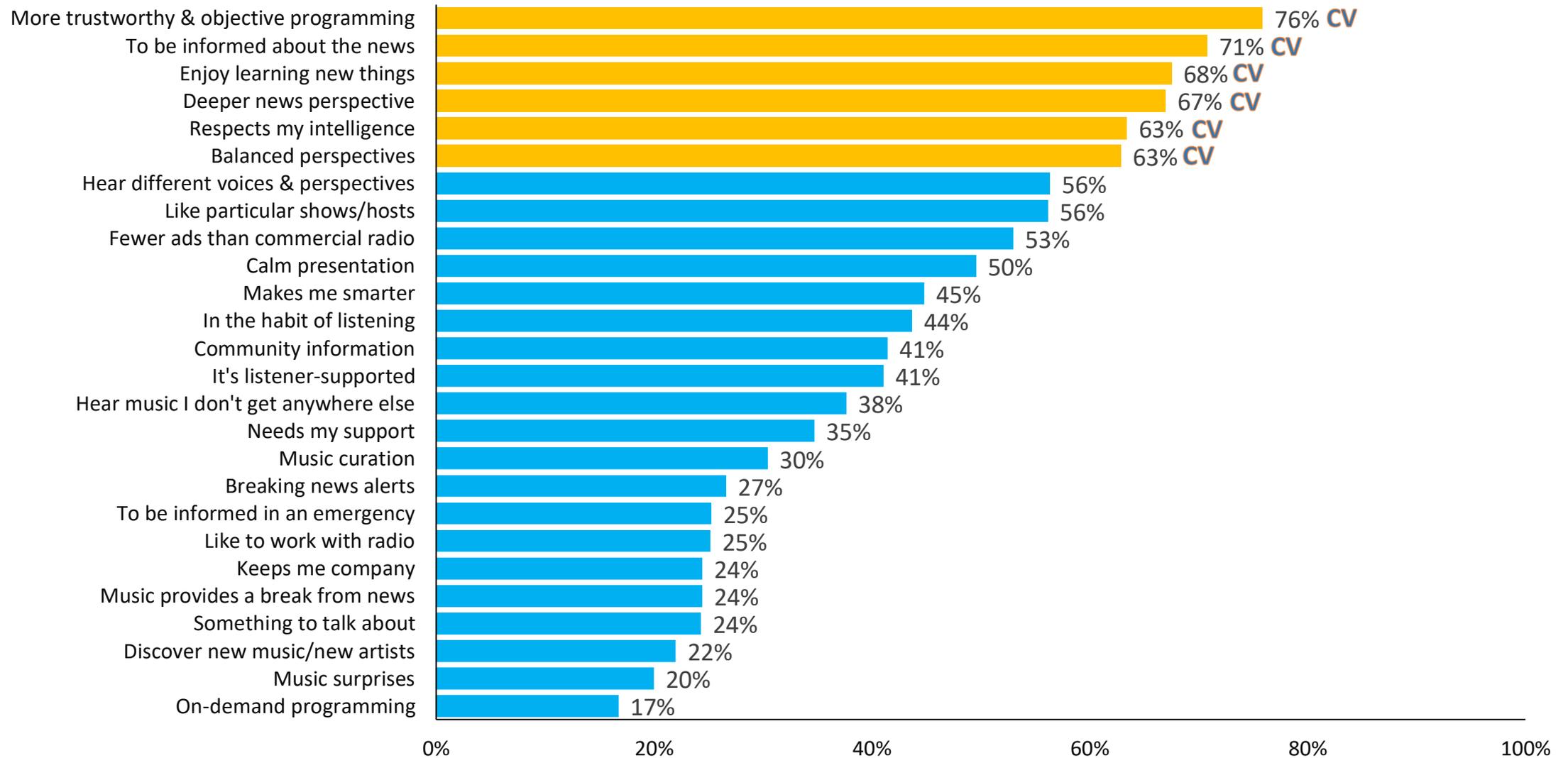
“How many hours on an average WEEKDAY (Monday-Friday) do you use/listen to any local AM/FM radio stations (using a regular radio OR audio stream on any device)?”

Three in Four Have a Regular Radio Where They Live - a New Low; Just Over Half of Millennials Now Own a Radio at Home



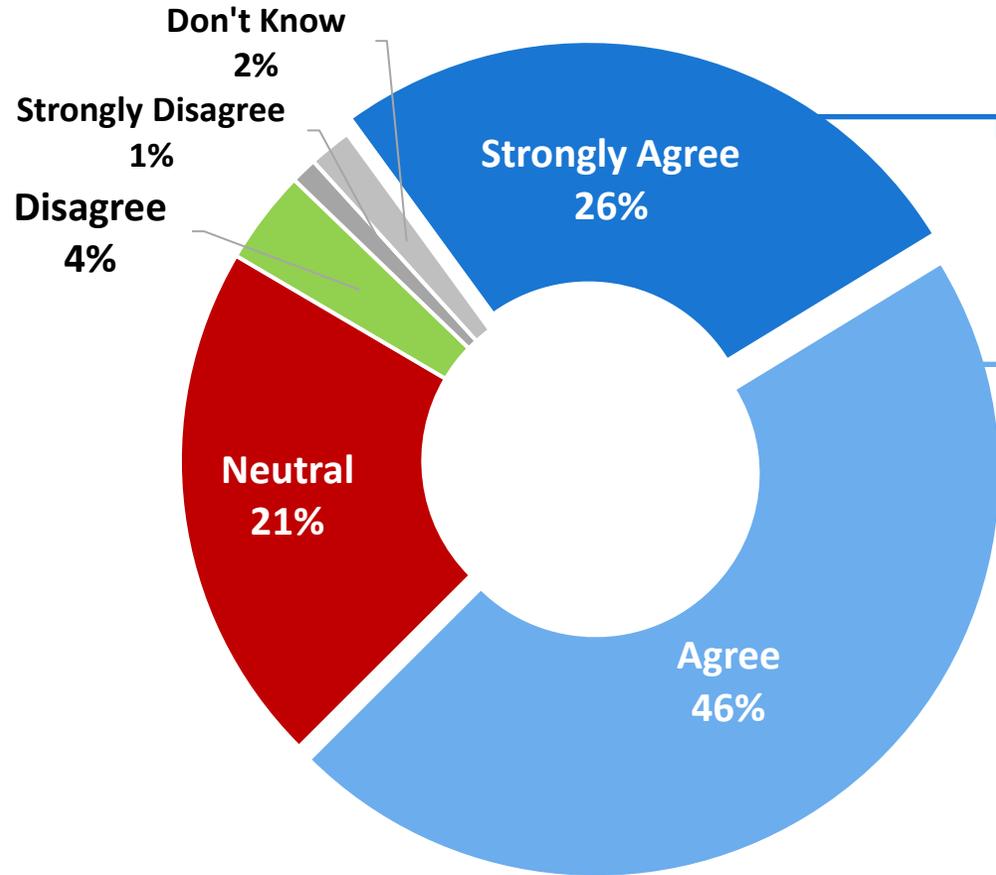
% with a regular radio in working condition where they live that they use

Public Radio's Core Values are Alive and Well



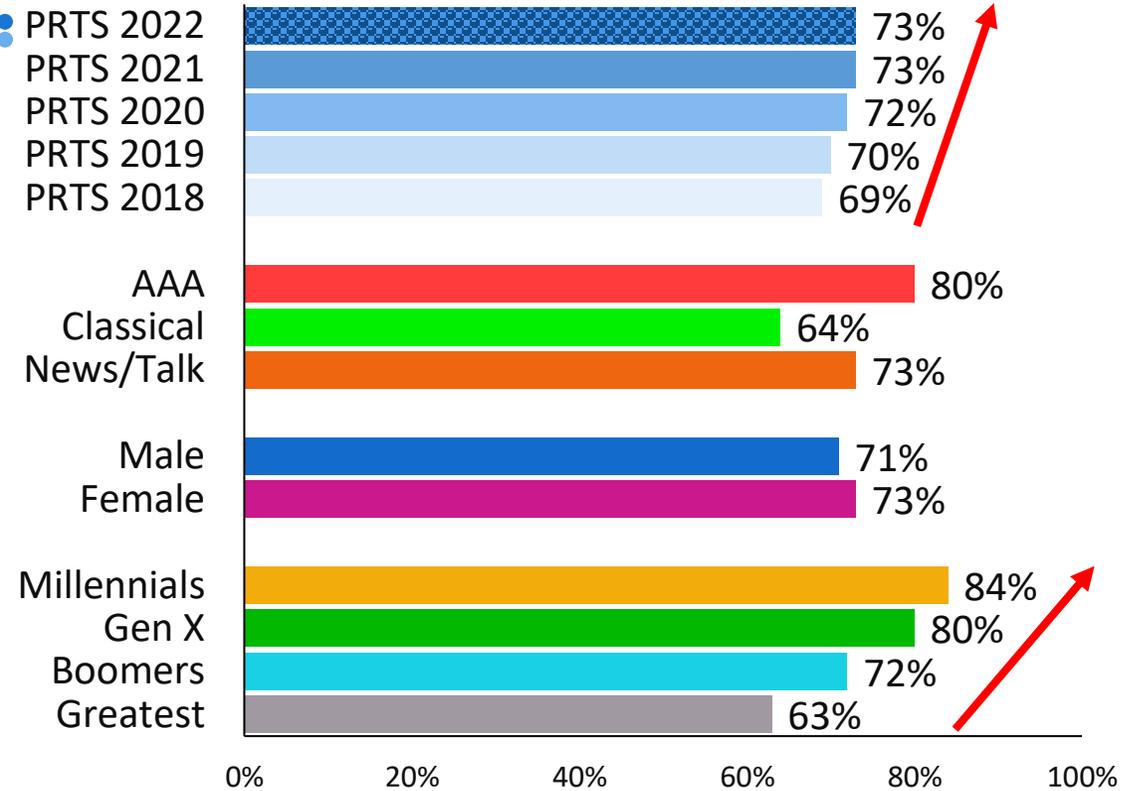
Among those who listen to AM/FM radio, % who say this is a main reason they listen to Public Radio

Radio's Local Edge Retains Its Post-COVID Bump

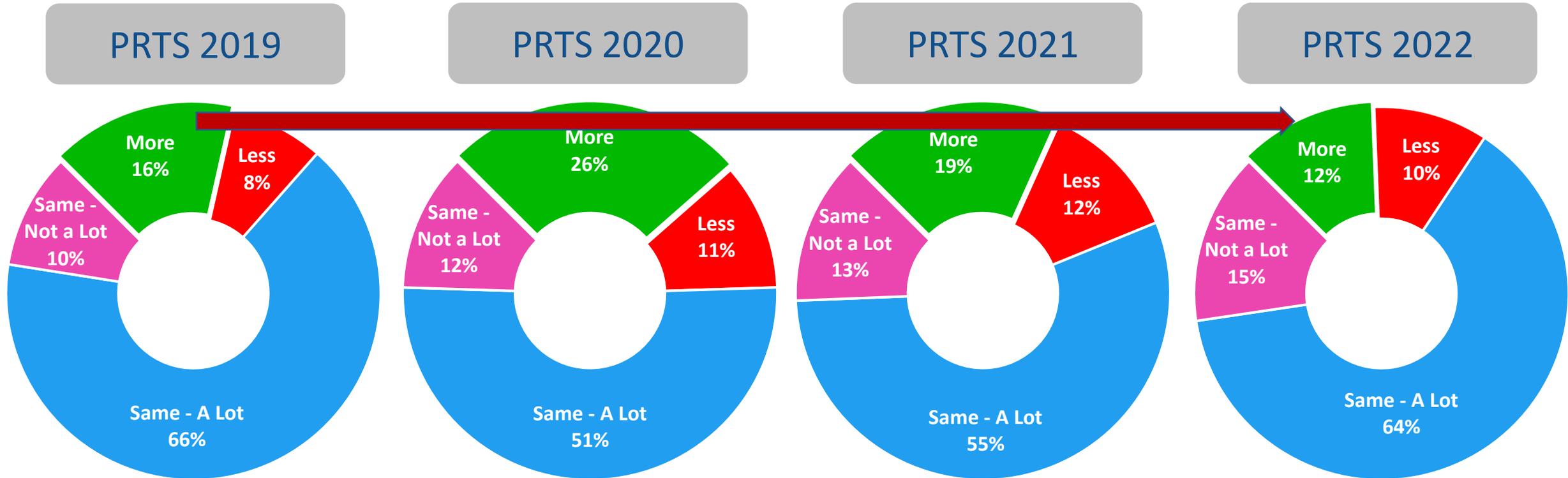


"One of radio's primary advantages is its local feel"

% Agreement (Strongly Agree + Agree)

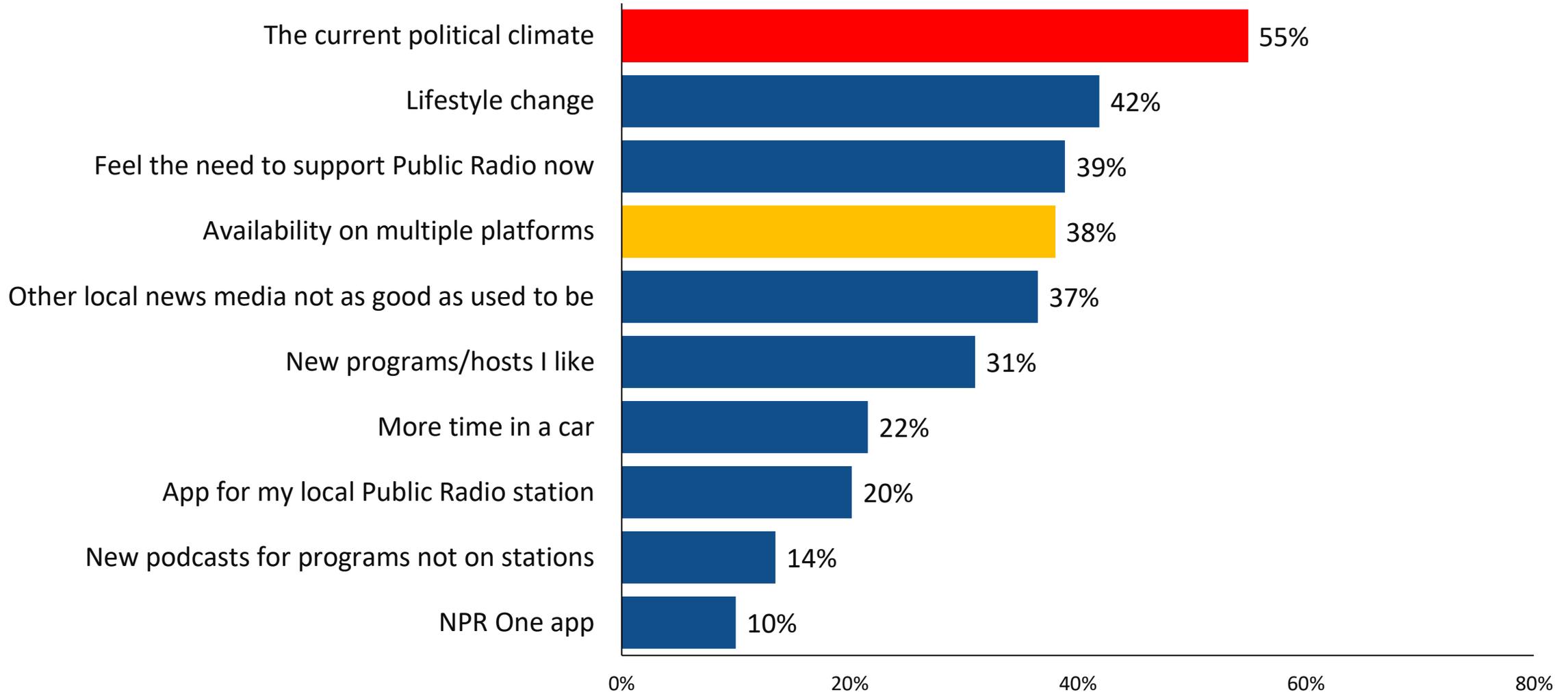


Since Peak COVID and the 2020 Election, Public Radio Listening Momentum Is At a Low Point



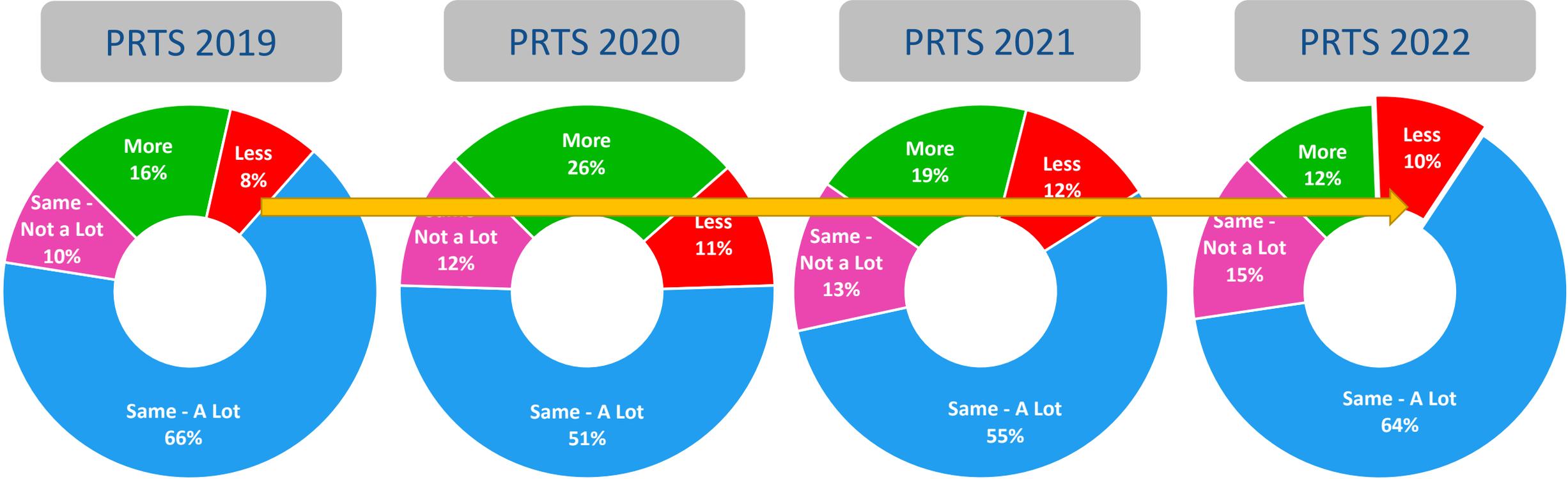
Among those who listen to AM/FM radio

Main Reasons For Listening to Public Radio More



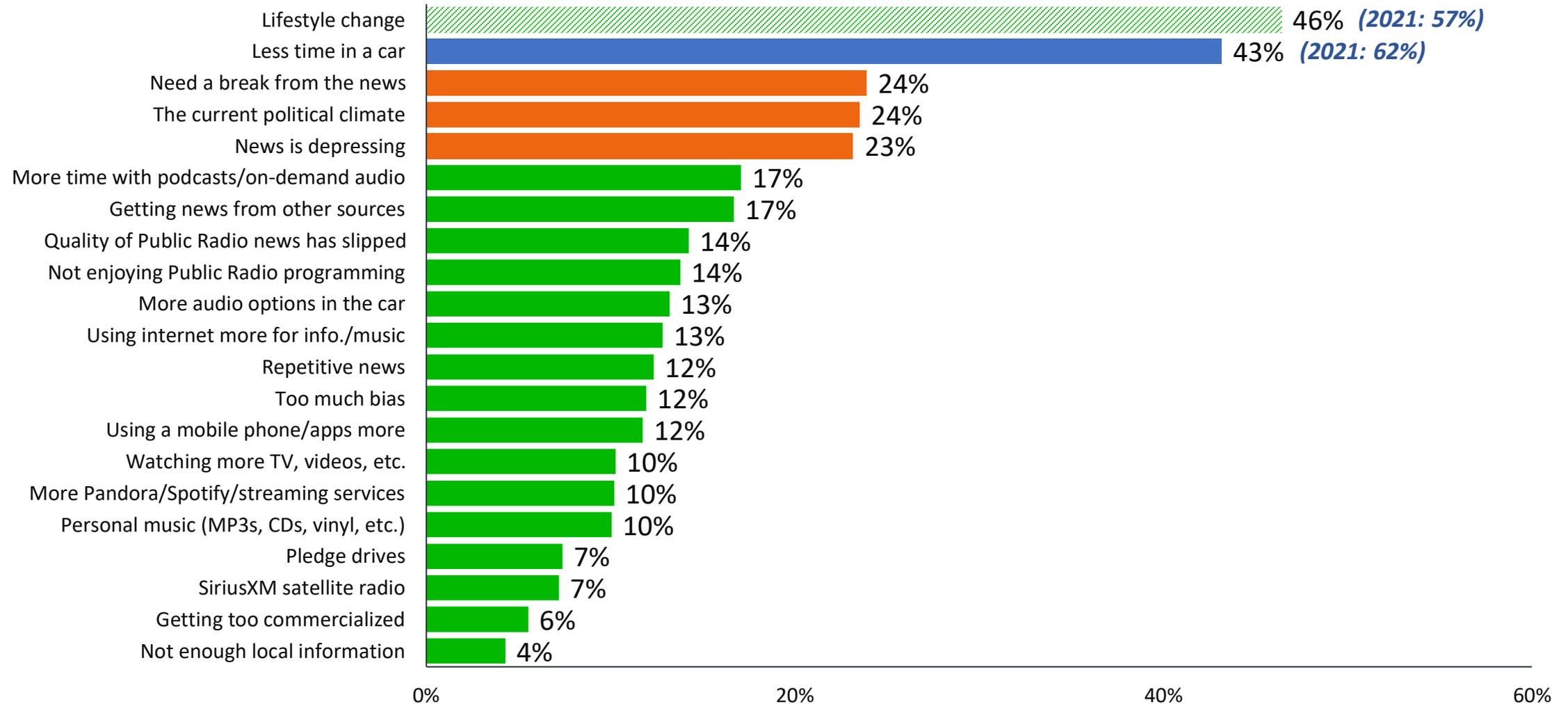
Among the 12% who say they are listening to Public Radio more in the past year,
% who say this is a main reason they listen more

Holding Fast, Only One in Ten Is Listening to Public Radio Less



Among those who listen to AM/FM radio

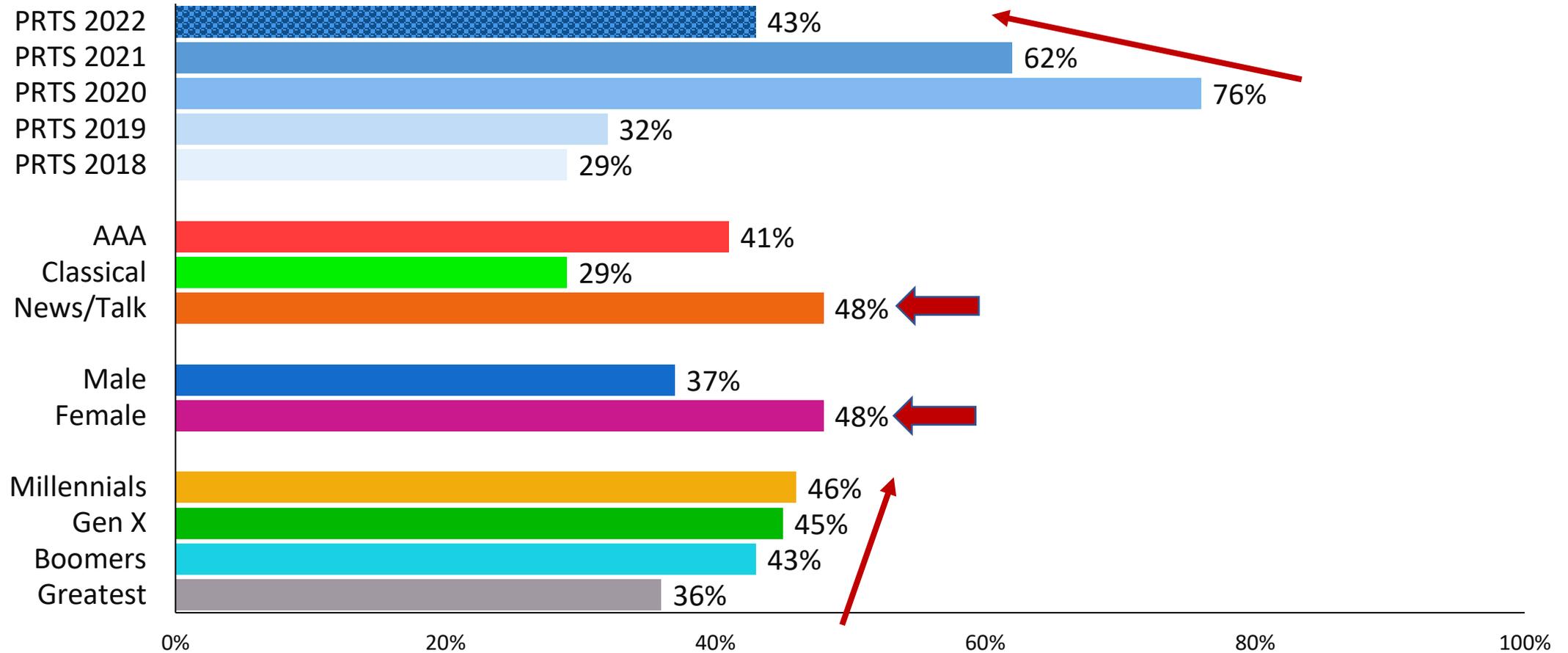
Main Reasons For Listening to Public Radio Less



Among the 10% who say they are listening to Public Radio less in the past year, % who say this is a main reason they listen less

Spending Less Time in a Car as a Reason to Listen to Less Radio Is Heading Back To Pre-Pandemic Levels

“Spending Less Time in a Car”



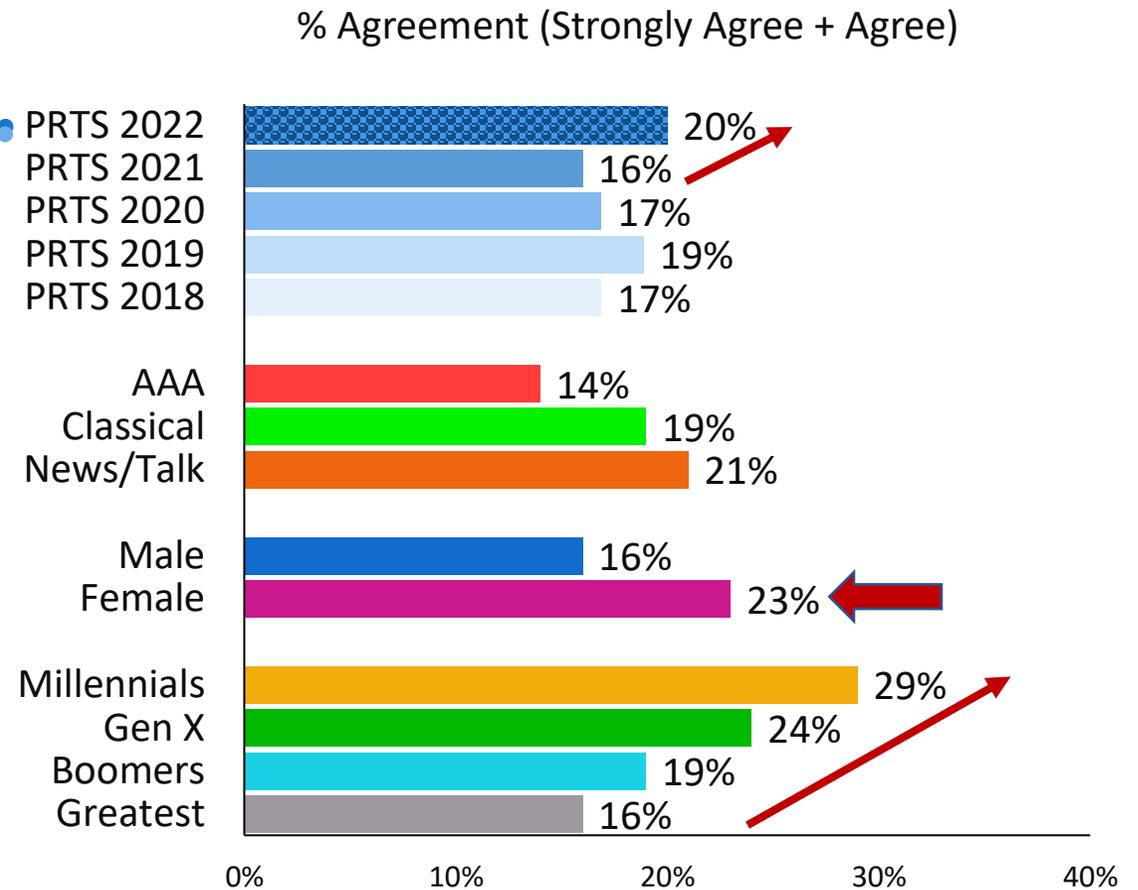
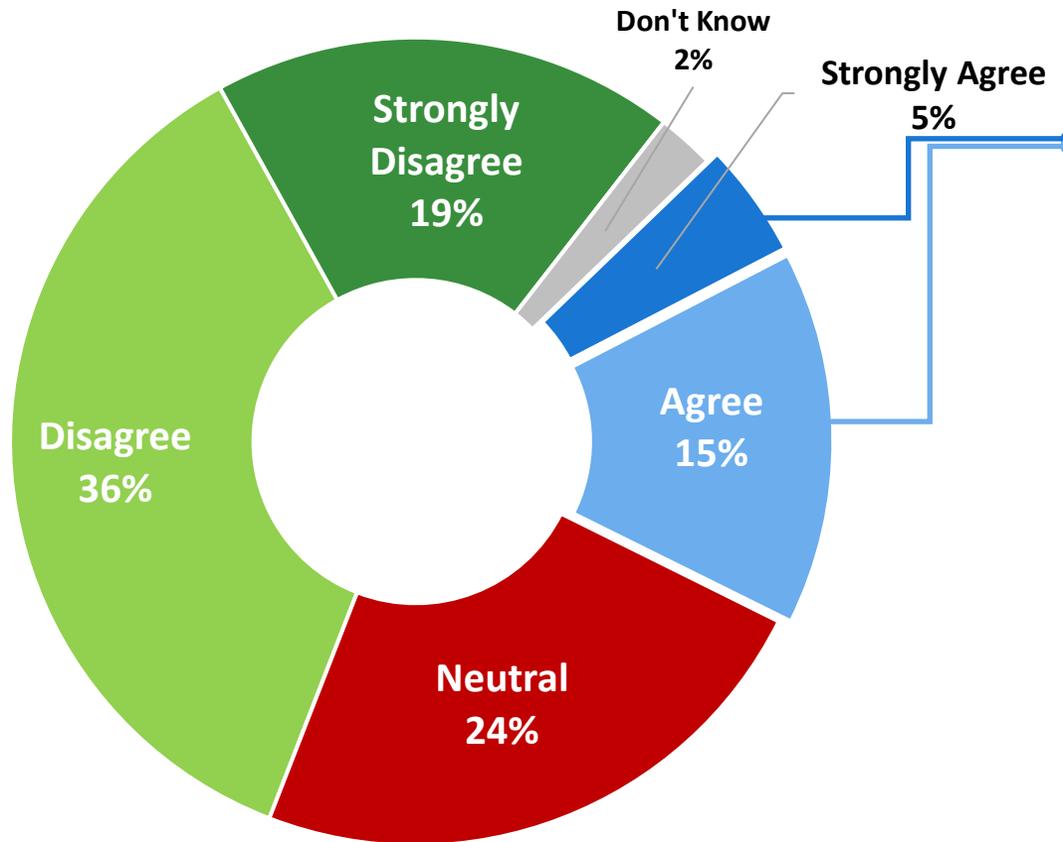
Among the 10% who say they are listening to Public Radio less in the past year, % who say this is a main reason they listen less

The Politics of



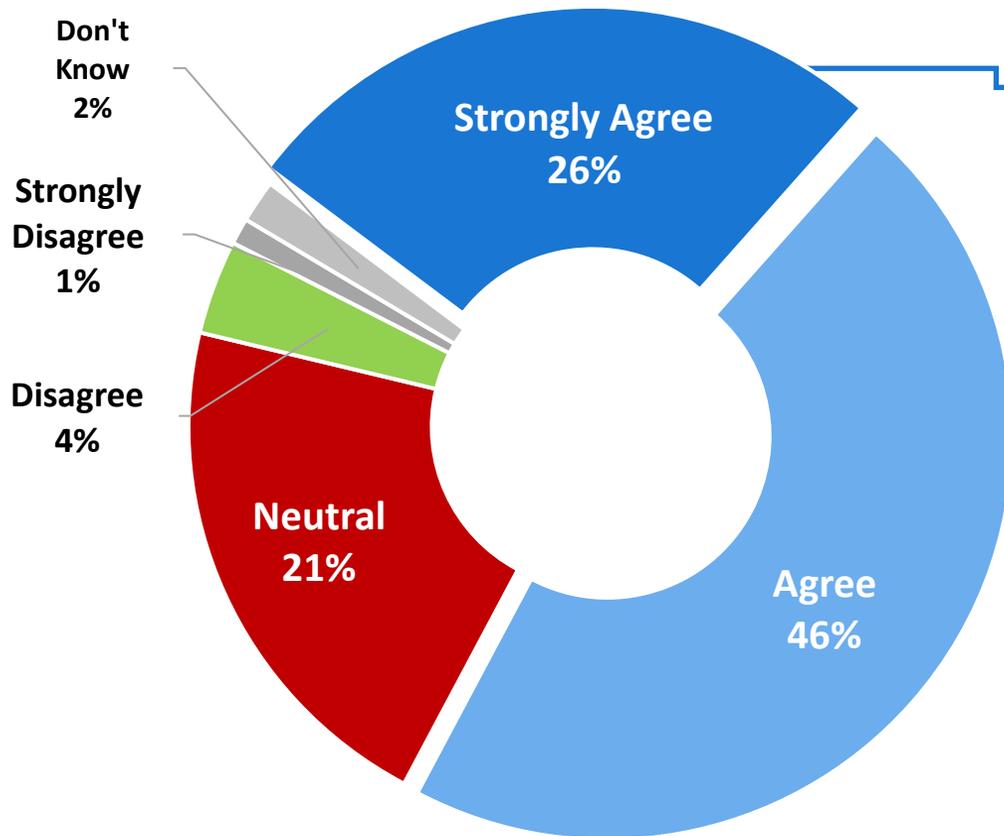
Politics is the double-edged sword, still driving news interest, but also causing burnout among Public Radio fans.

Millennials and Gen Xers Say They Are Listening to Less Public Radio to Get a Break From the News

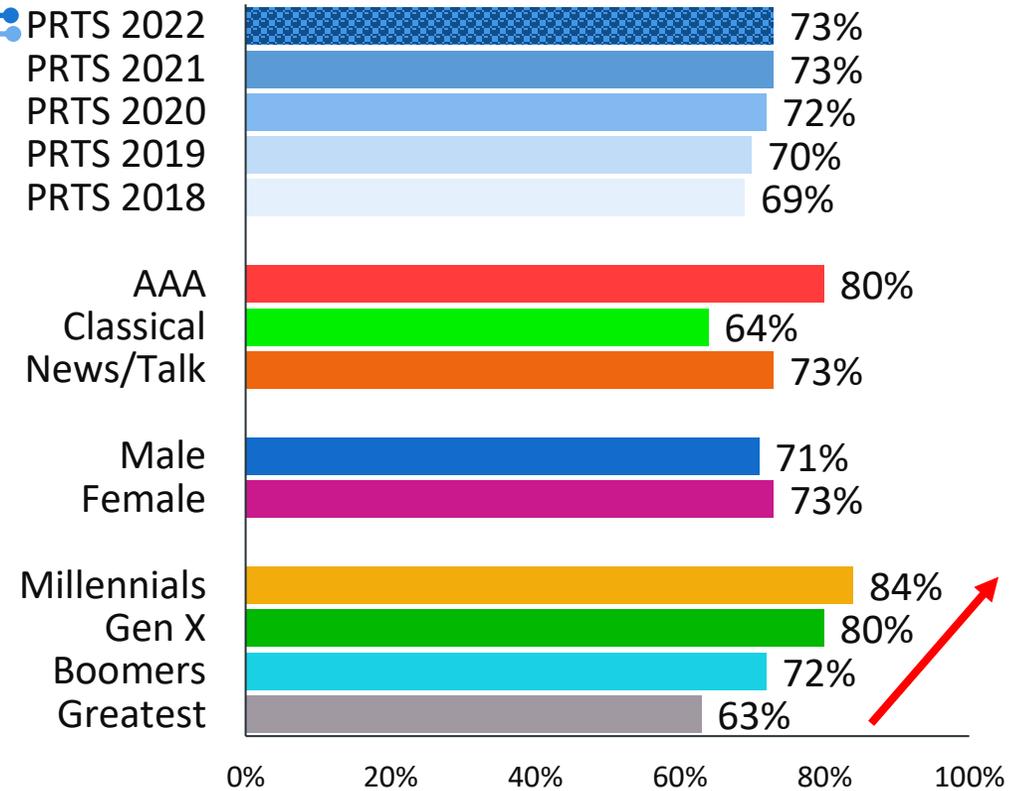


"I find myself spending less time with Public Radio because I increasingly need a break from the news"

Nearly Three in Four Acknowledge Radio's Local Advantage, Especially Progressively Younger Respondents

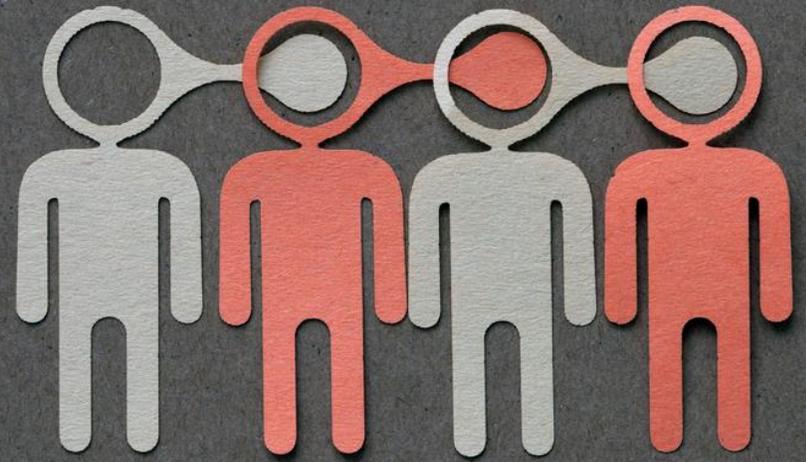


% Agreement (Strongly Agree + Agree)

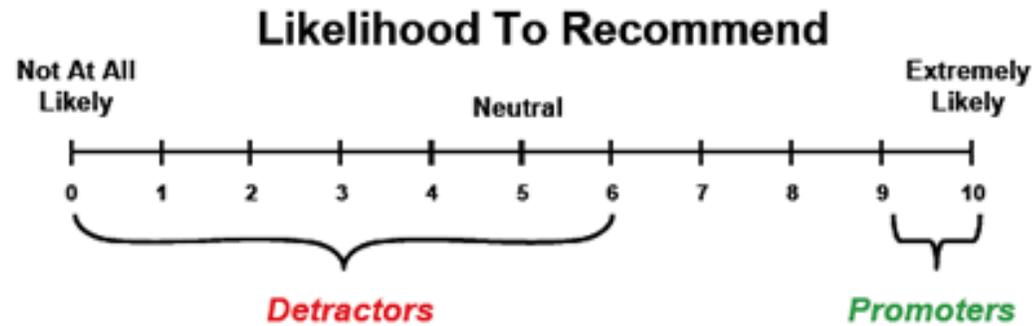


"One of radio's primary advantages is its local feel"

**Public Radio's
recommendation
scores have slipped
to a 7-year low.**

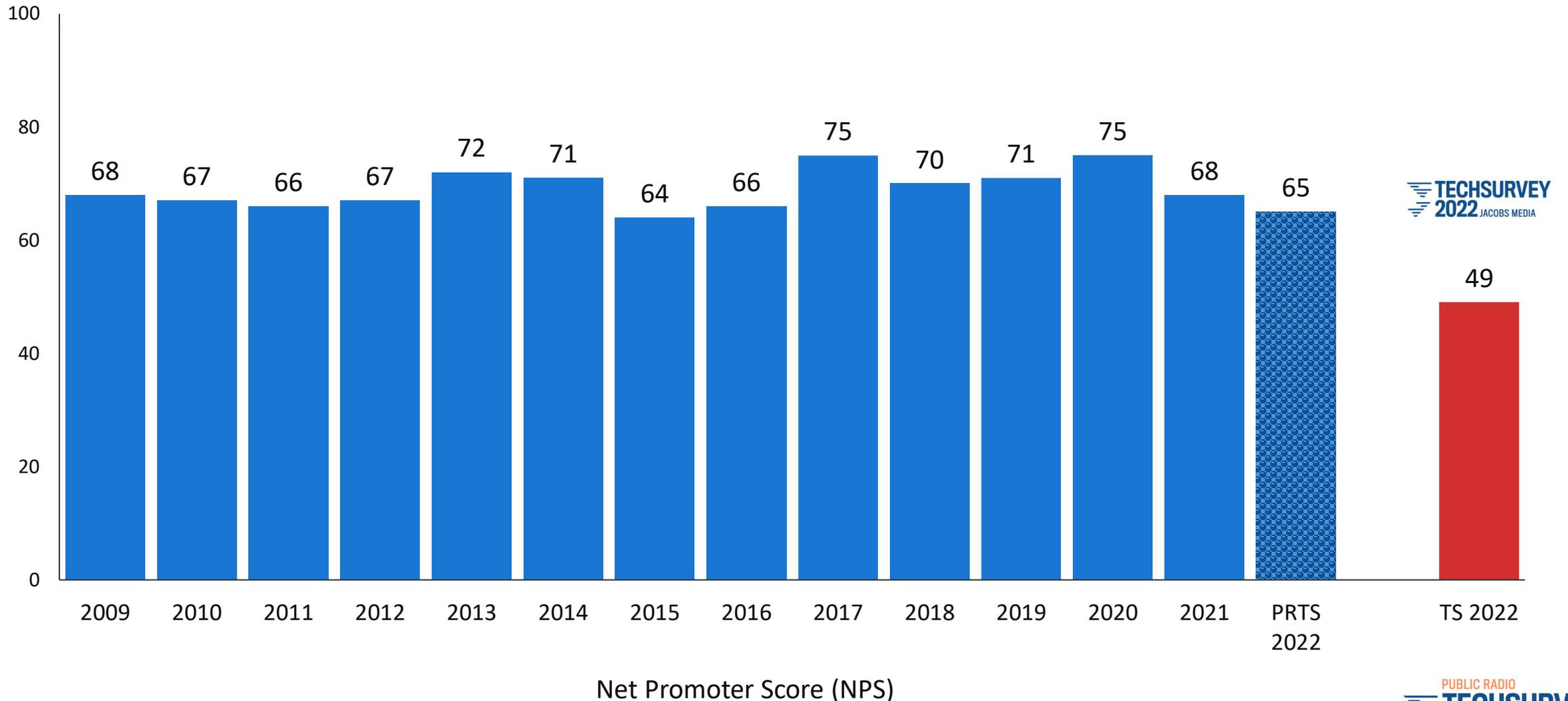


NET PROMOTER

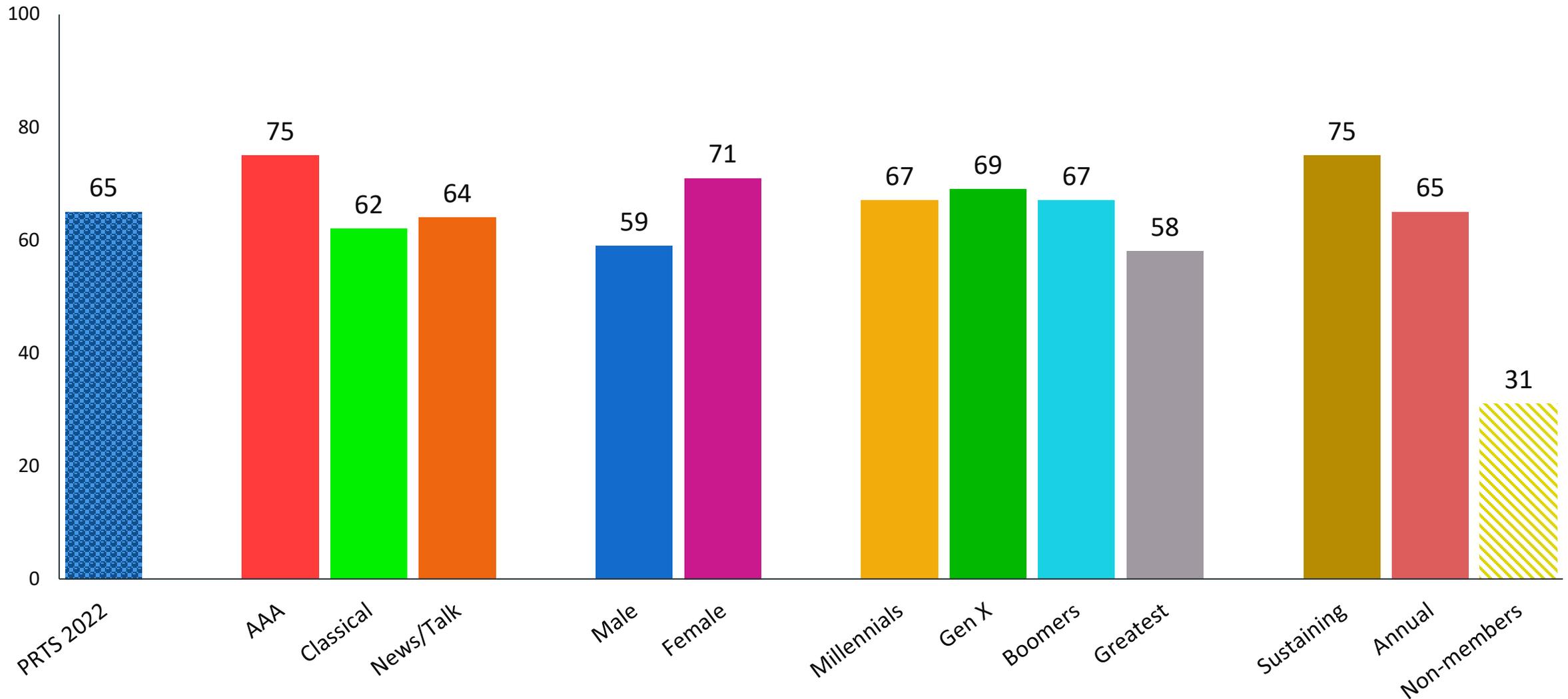


$$\% \text{ Promoters} - \% \text{ Detractors} = \text{Net Promoter Score}$$

Public Radio's Net Promoter Score Dips Further, a Growing Concern About Momentum



NPS Is Strongest among Triple A Fans, Women, and Sustainers





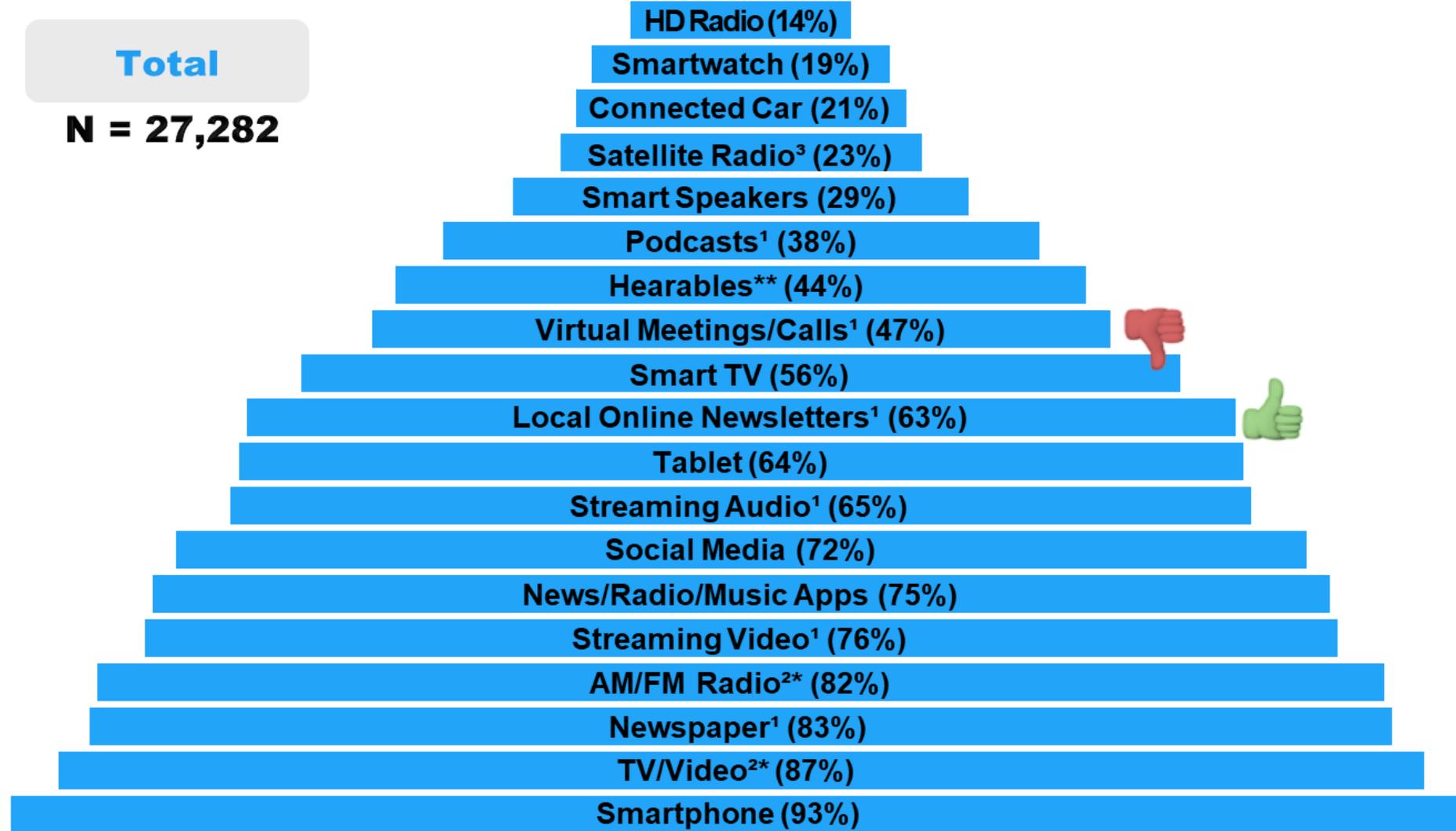
The Media &
Brand
Pyramids are
amazingly
stable.



Media Pyramid 2022

Total

N = 27,282



Total PRTS 2021
14%
17%
21%
23%
30%
39%
42%
53%
54%

66%
67%
74%
75%
78%
82%
85%
85%
92%

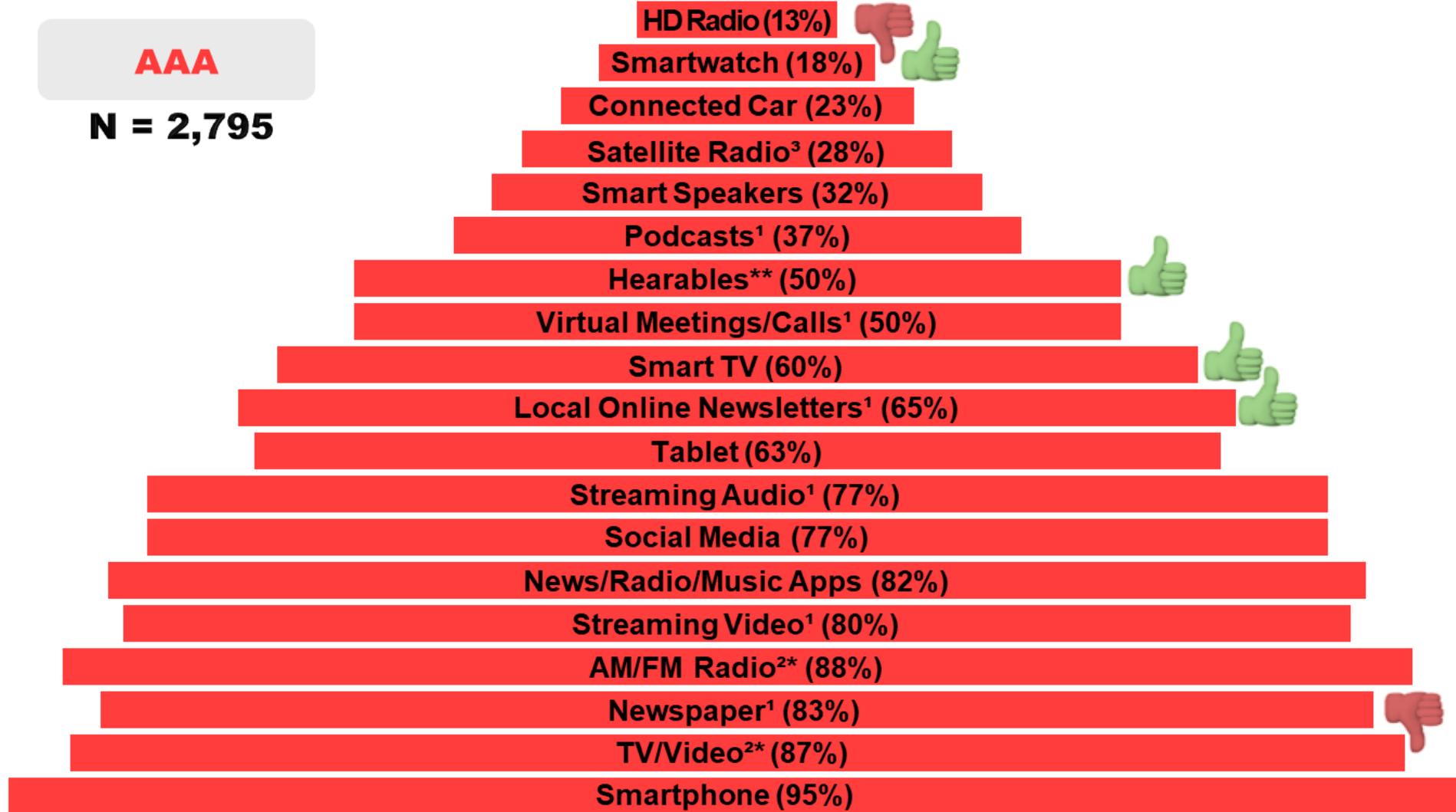
¹ Weekly or more ² 1+ hour per day ³ Paid & trial users *Any platform/device **Wireless headphones/earbuds



Media Pyramid 2022

AAA

N = 2,795



**AAA
PRTS 2021**

16%
15%
22%
30%
34%
36%
47%
52%
56%

65%
78%
79%
80%
82%
86%
87%
86%
94%

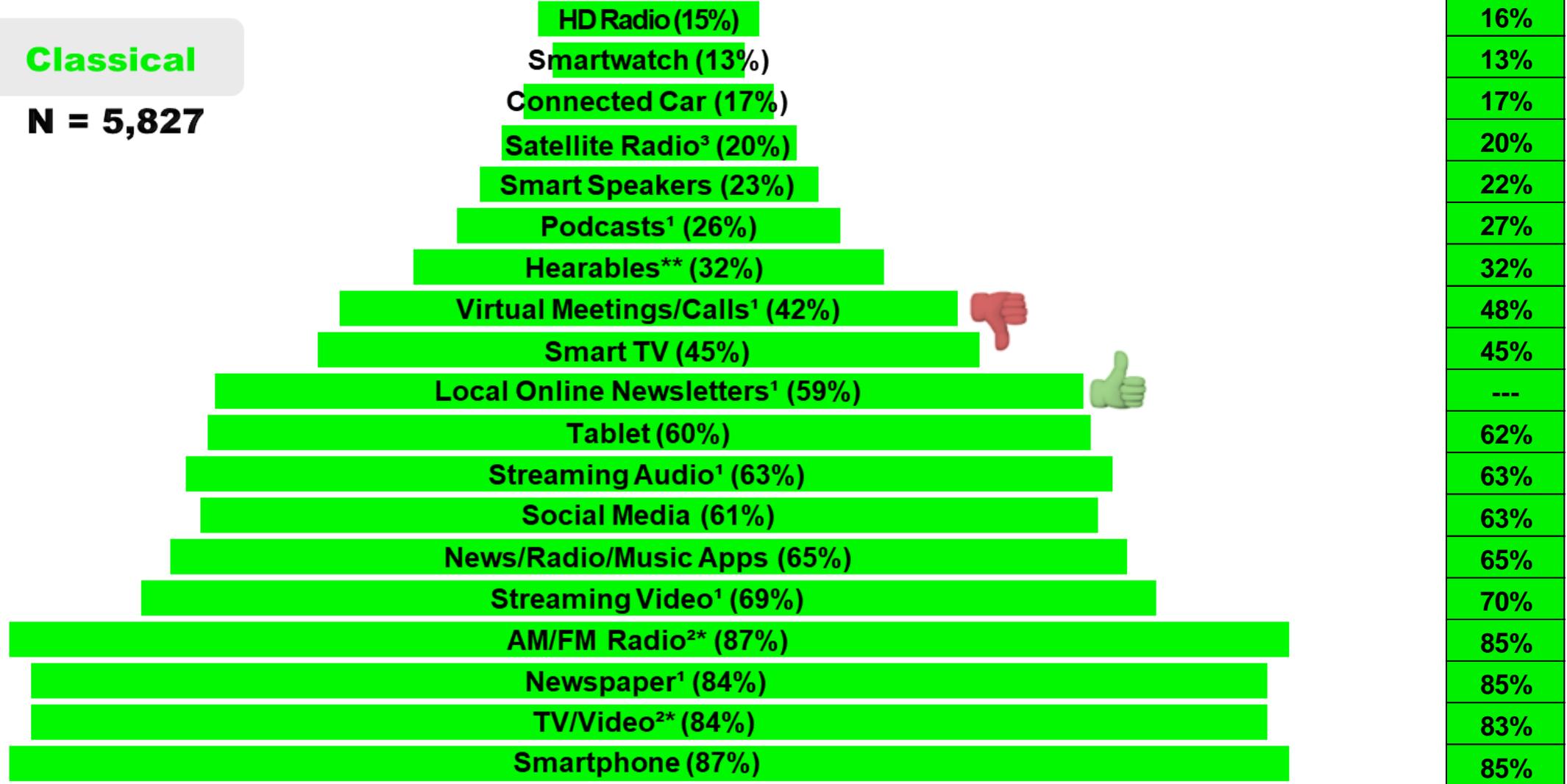
¹ Weekly or more ² 1+ hour per day ³ Paid & trial users *Any platform/device **Wireless headphones/earbuds



Media Pyramid 2022

Classical

N = 5,827



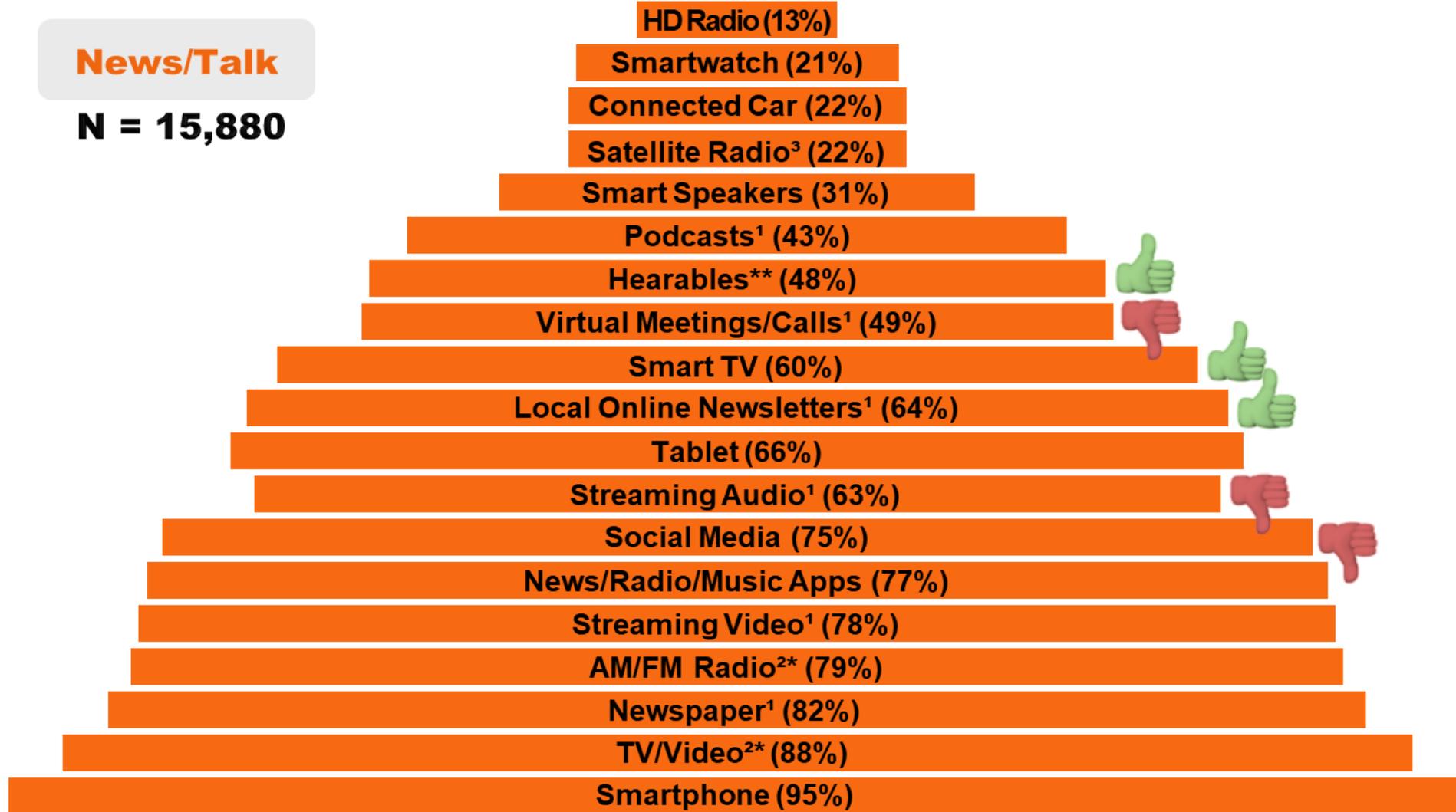
¹ Weekly or more ² 1+ hour per day ³ Paid & trial users *Any platform/device **Wireless headphones/earbuds



Media Pyramid 2022

News/Talk

N = 15,880



News/Talk PRTS 2021
13%
19%
23%
22%
32%
44%
45%
57%
57%

67%
66%
78%
77%
80%
79%
84%
86%
94%

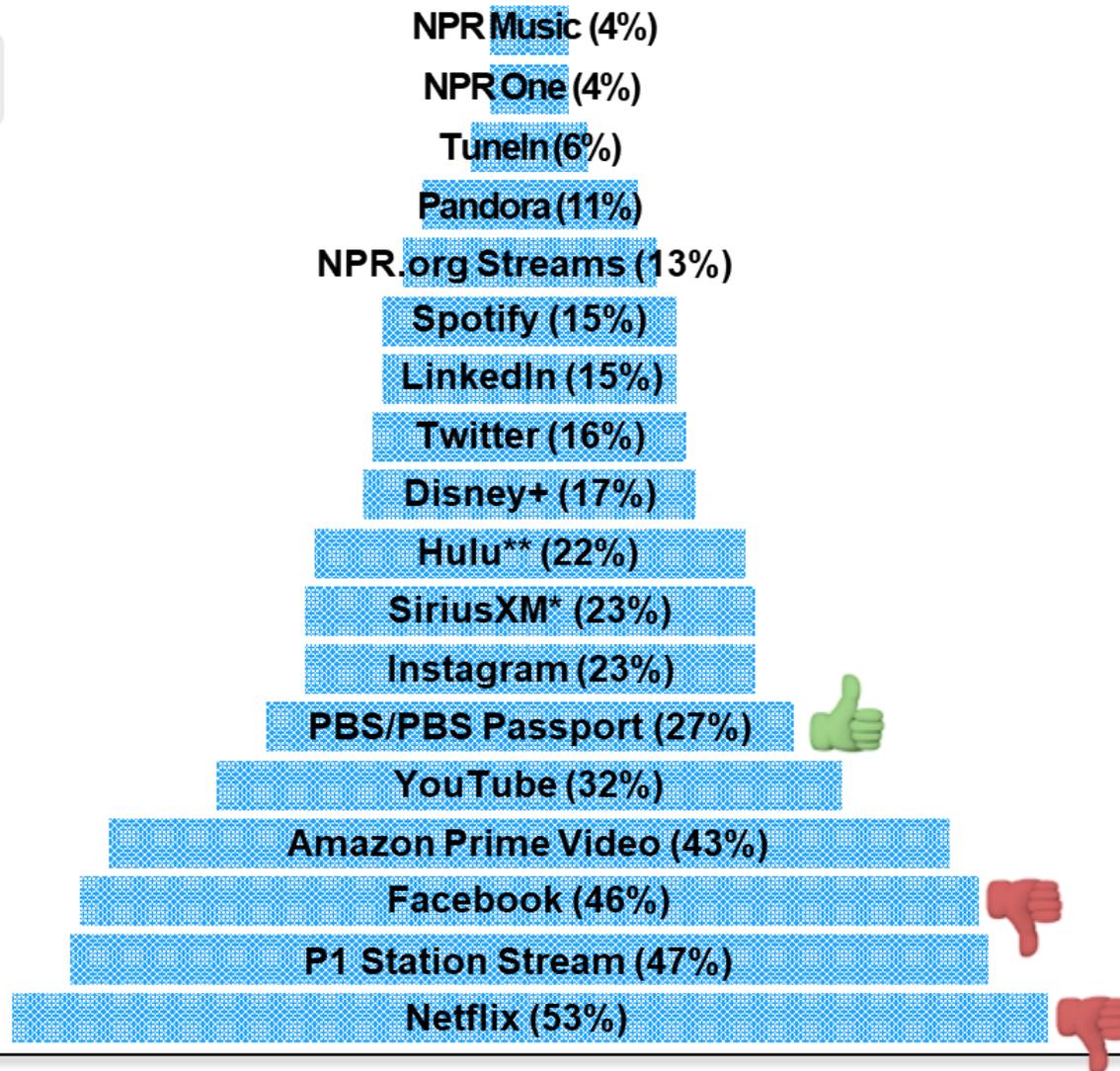
¹ Weekly or more ² 1+ hour per day ³ Paid & trial users *Any platform/device **Wireless headphones/earbuds



Brand Pyramid 2022

Total

N = 27,282

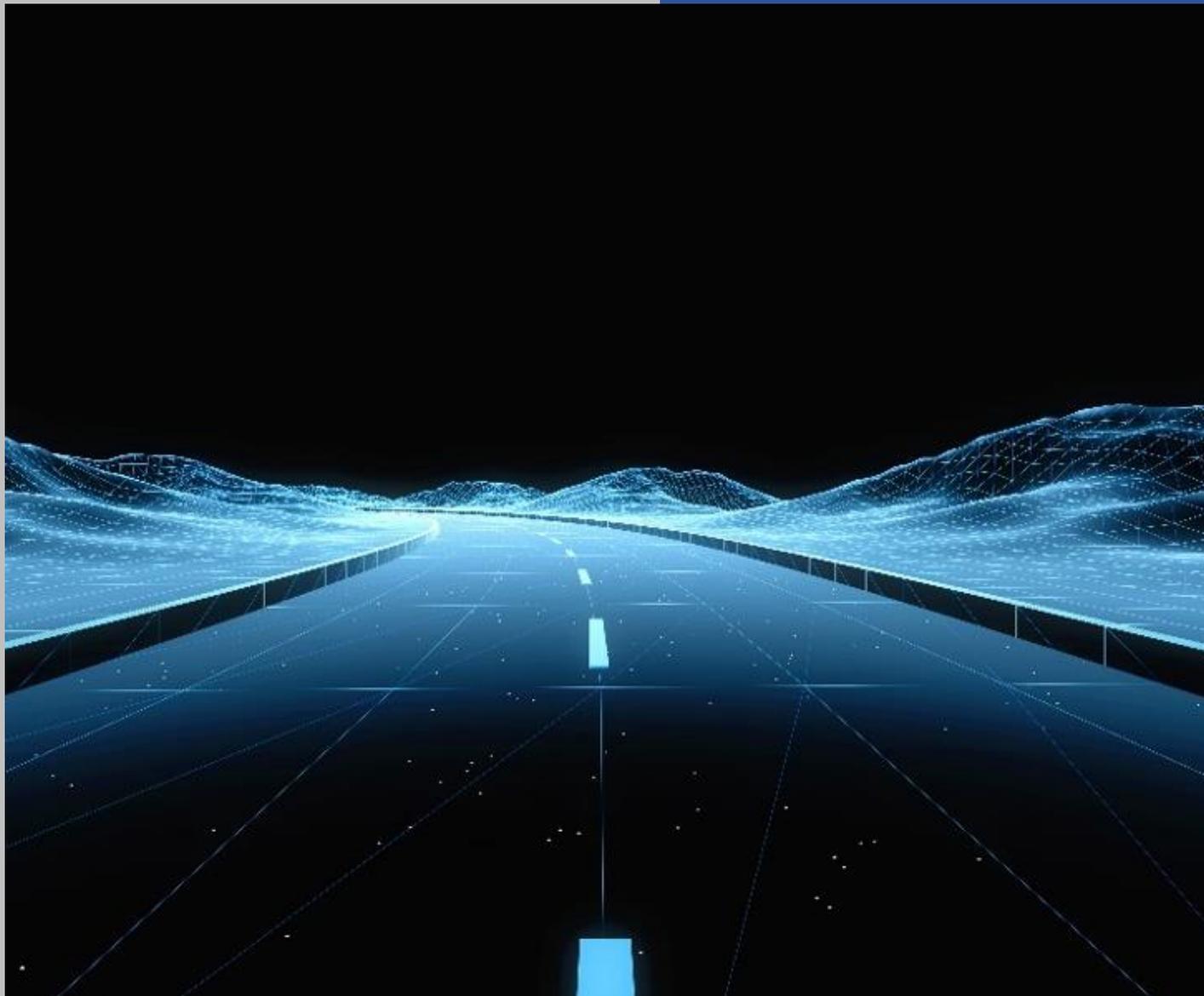


Total PRTS 2021

4%
5%
6%
12%
13%
17%
15%
17%
15%
21%
23%
23%

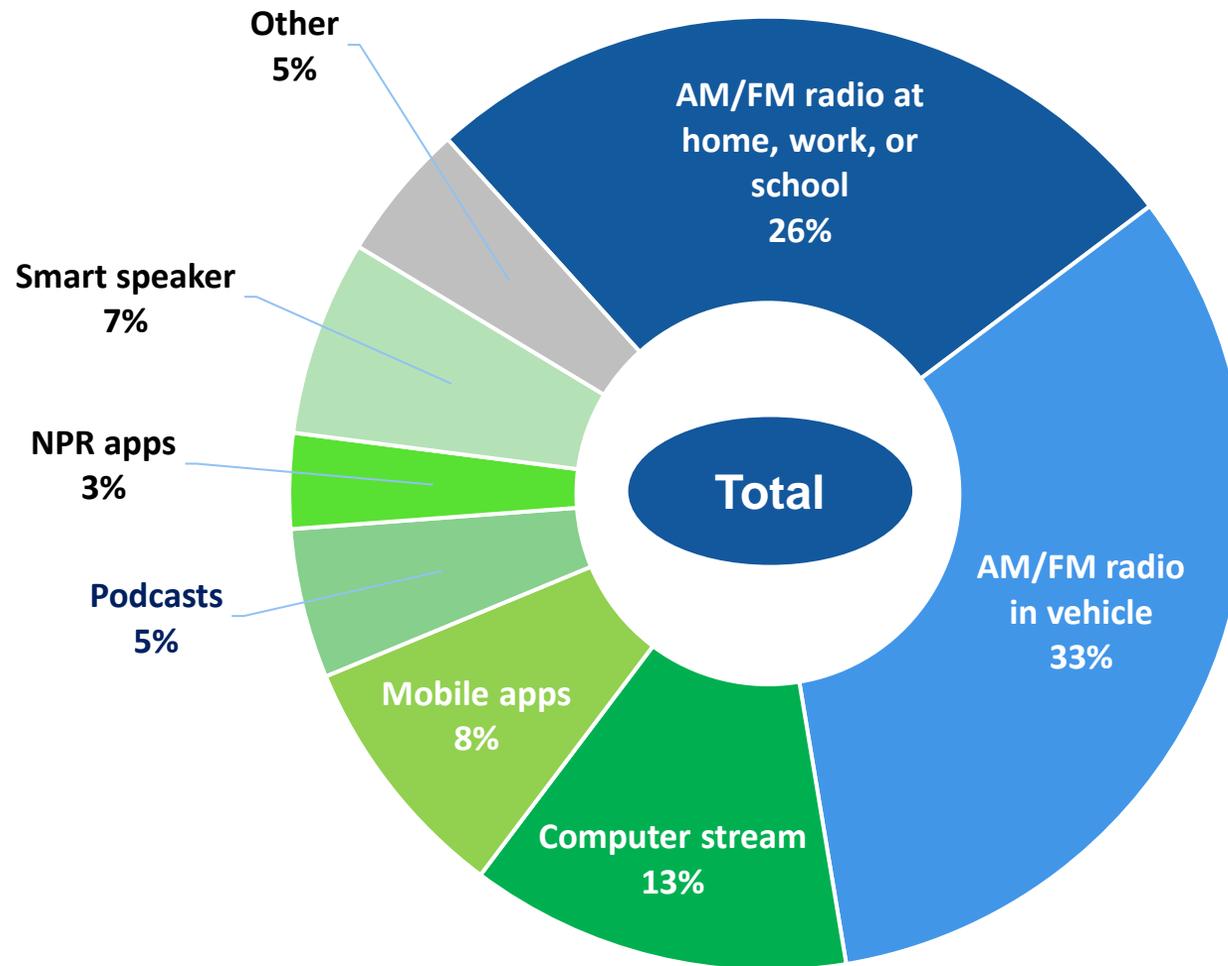
34%
44%
49%
48%
57%

All weekly use except SiriusXM (*Paid & trial users) **Includes Live TV



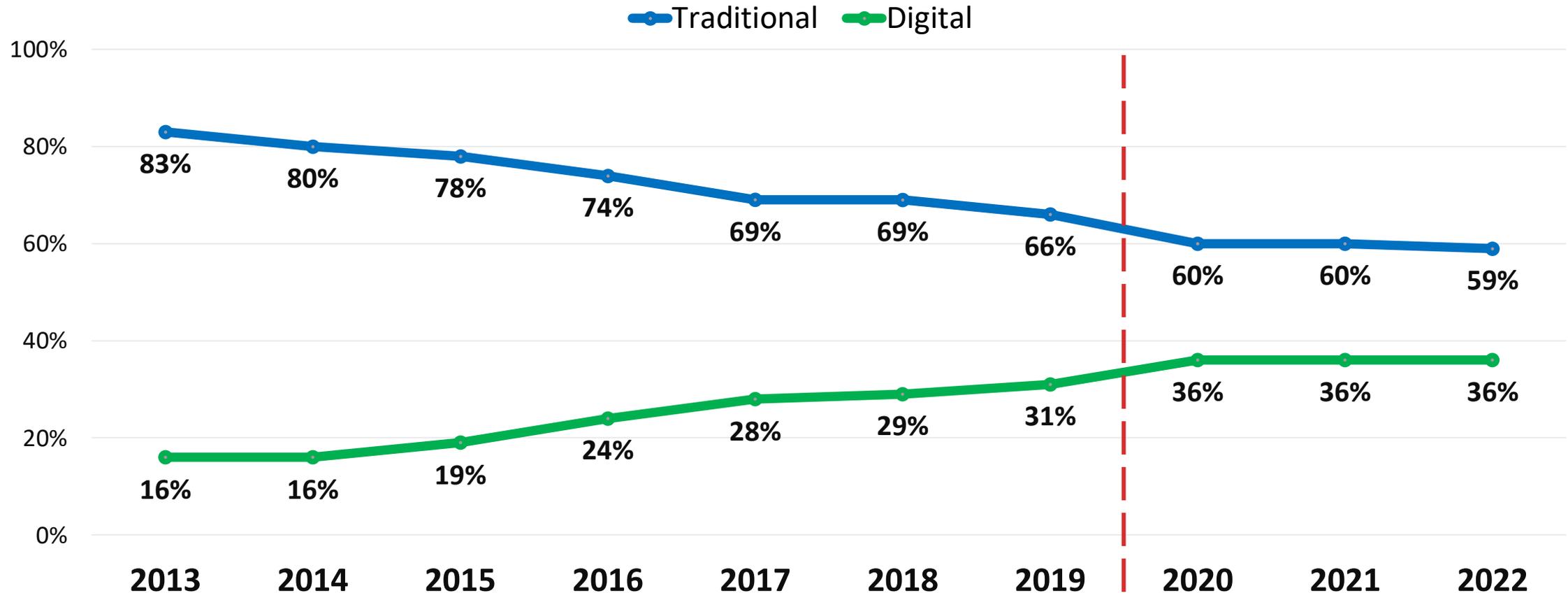
Digital continues to play a key role in Public Radio usage, but the transformation may be slowing.

How Do Public Radio Fans Listen to Their Favorite Stations?



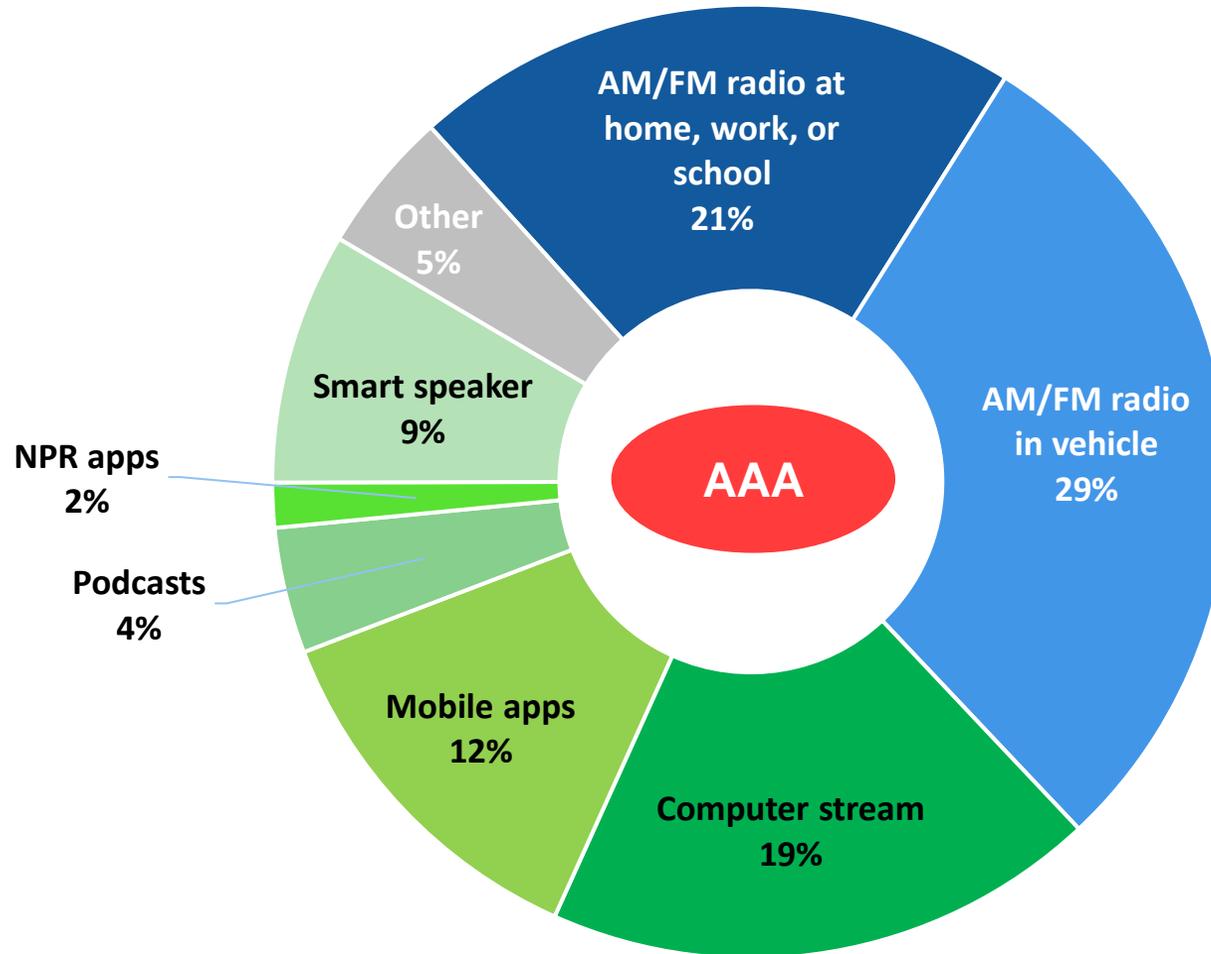
Traditional – 59%
Digital – 36%

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)

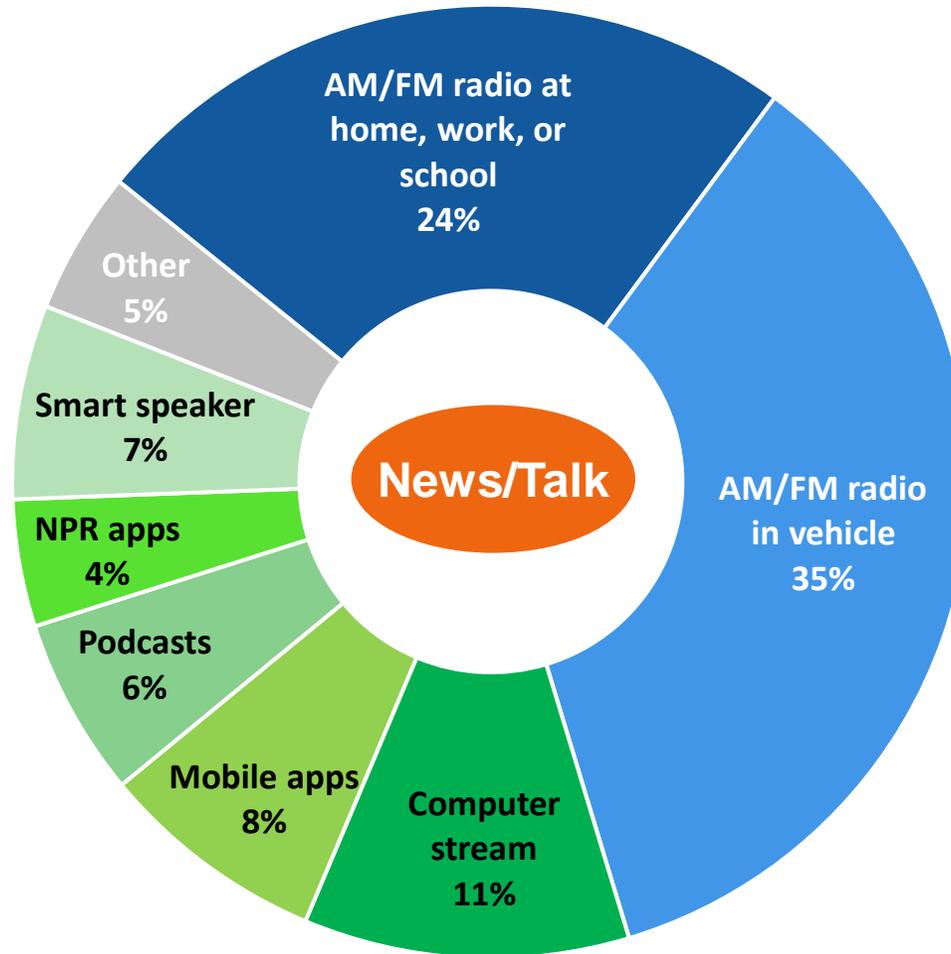
P1 Station Listening Platforms



Traditional – 50%
Digital – 46%

PRTS 2021
Traditional – 53%
Digital – 43%

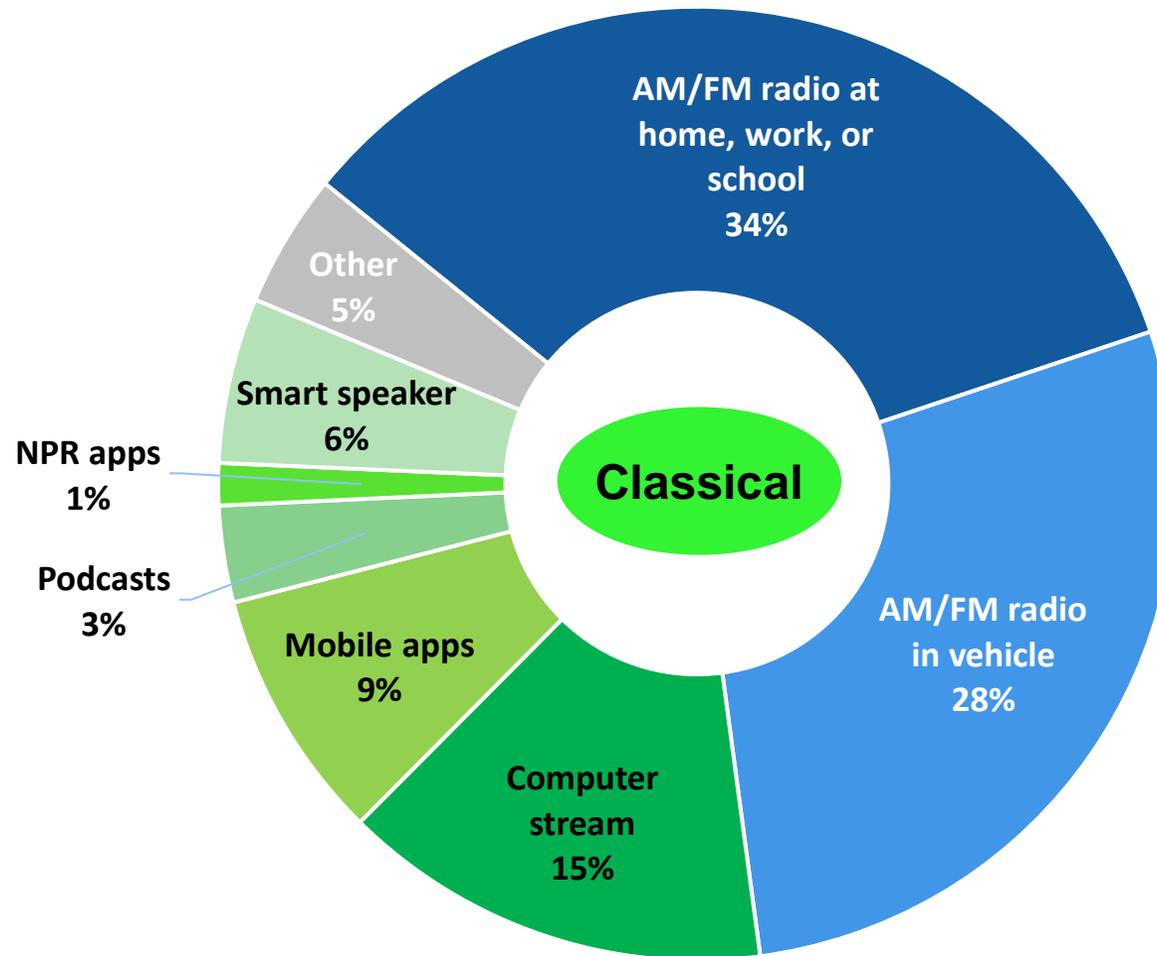
P1 Station Listening Platforms



Traditional – 59%
Digital – 36%

PRTS 2021
Traditional – 60%
Digital – 36%

P1 Station Listening Platforms



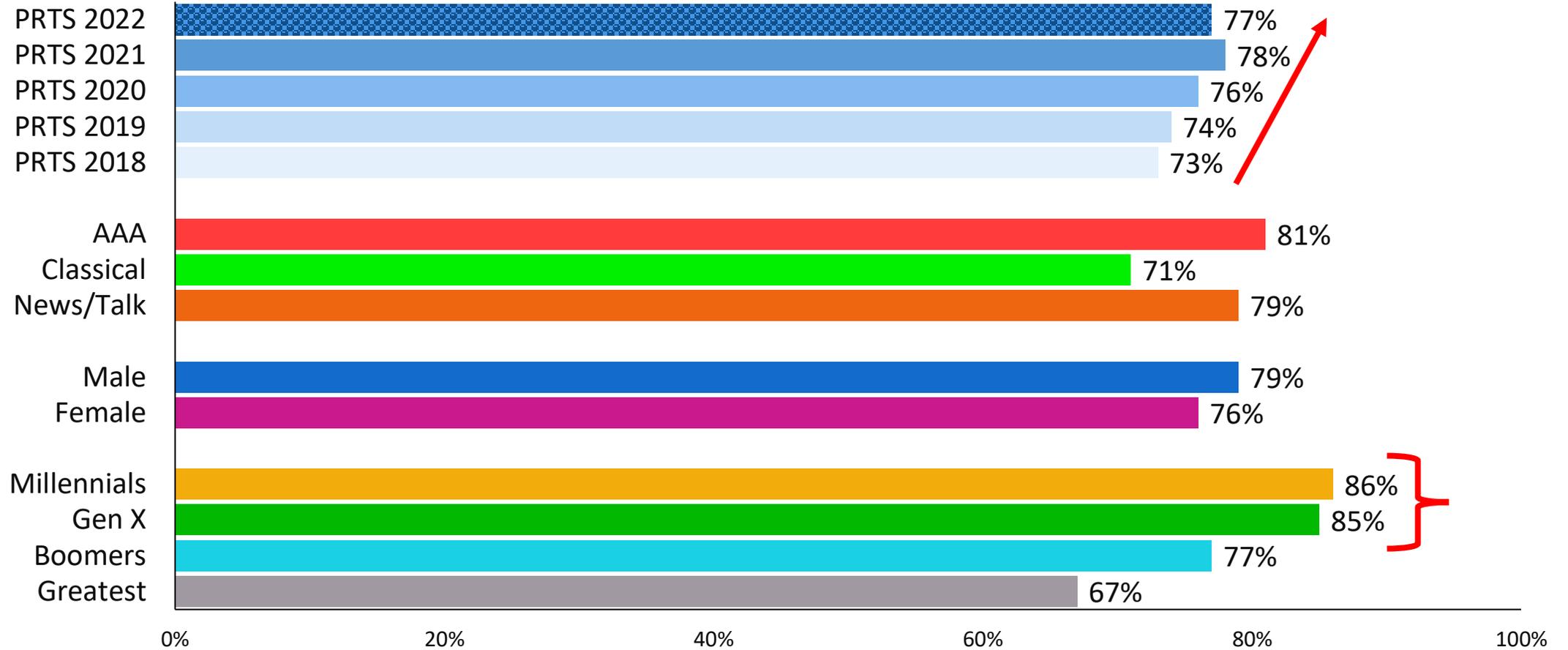
Traditional – 62%
Digital – 34%

PRTS 2021
Traditional – 62%
Digital – 33%



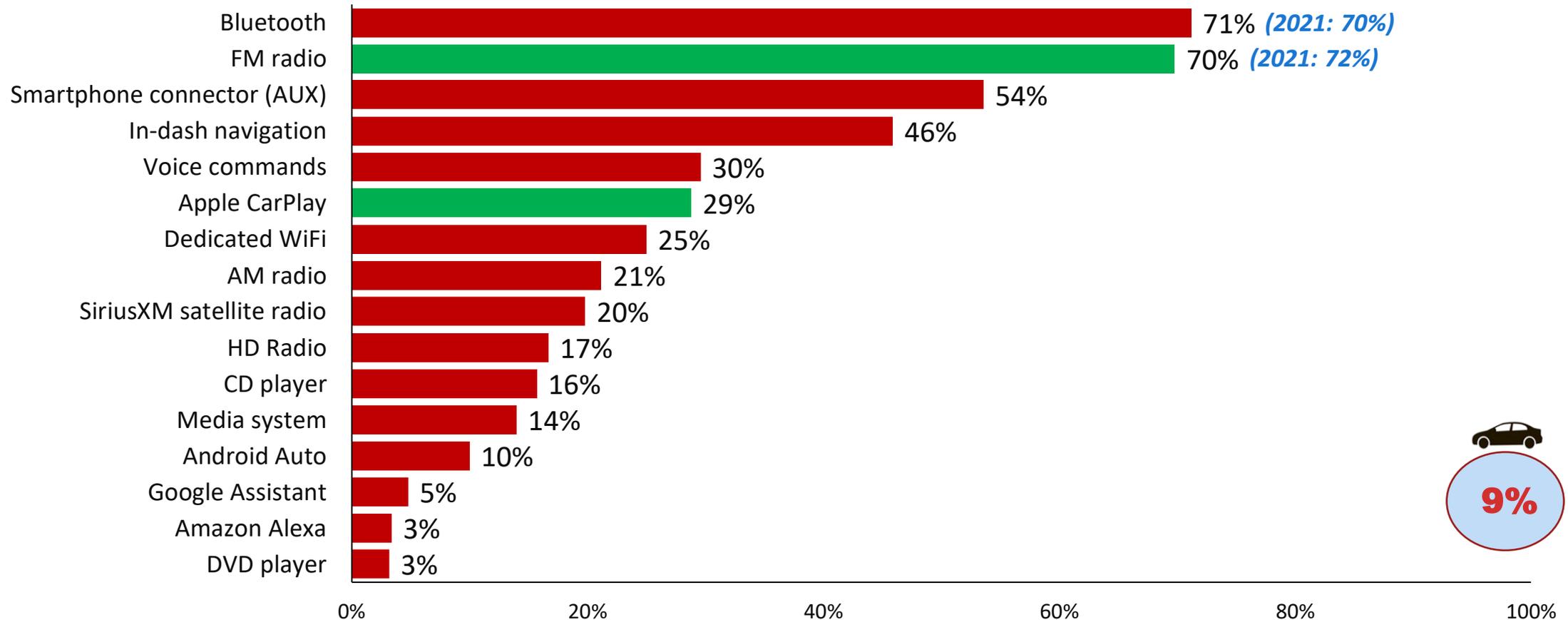
The car dashboard is changing...and so are driver preferences. Bluetooth is the “must-have” new car feature.

More Than Three in Four Can Now Connect a Smartphone in Their Cars, Especially Millennials and Gen Xers



Among smartphone owners who spend time in a car,
% who have a way to connect their smartphone to their car

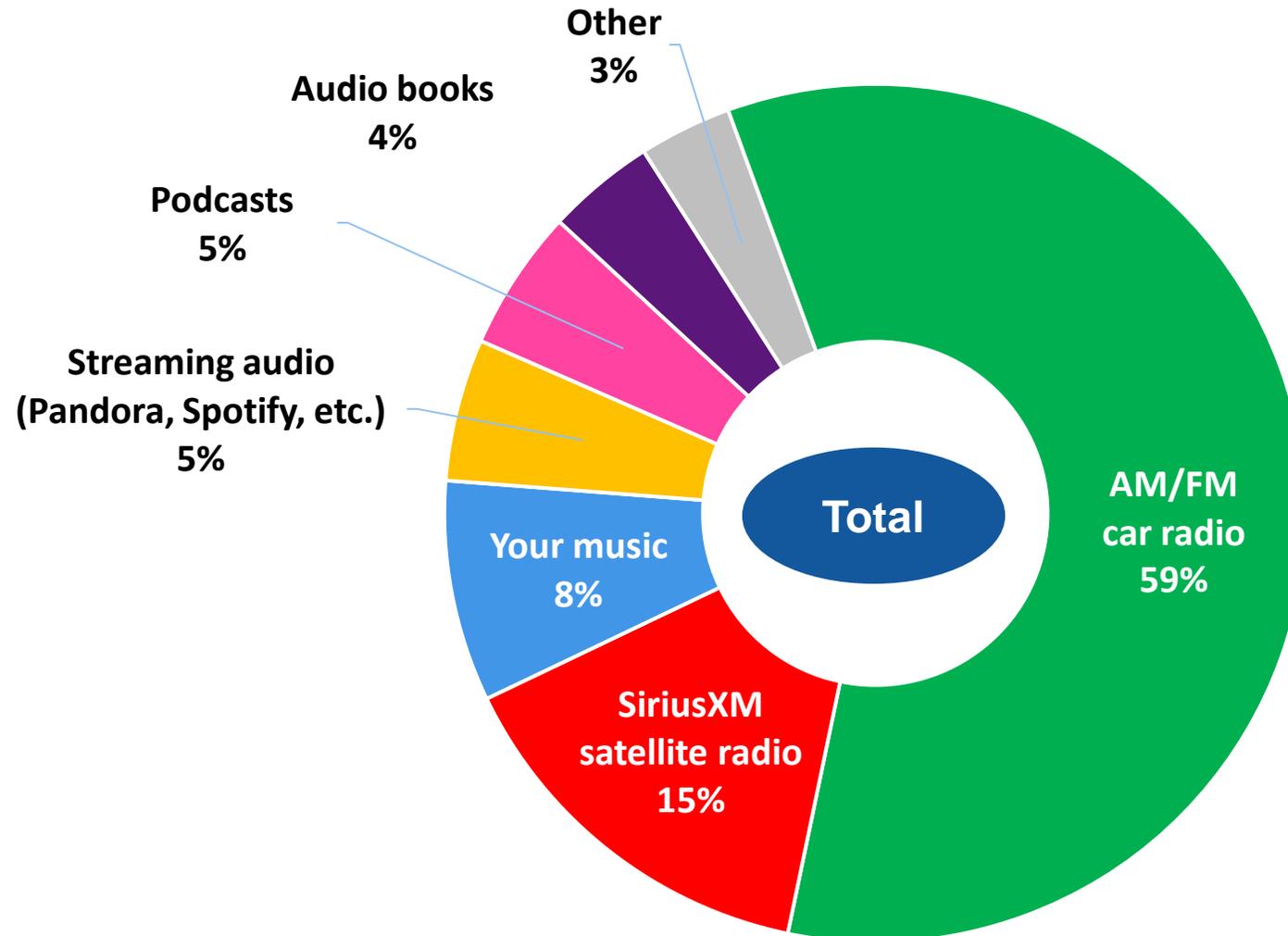
In a First, Bluetooth Overtakes FM Radio as the Most Important Feature Among New Car Buyers



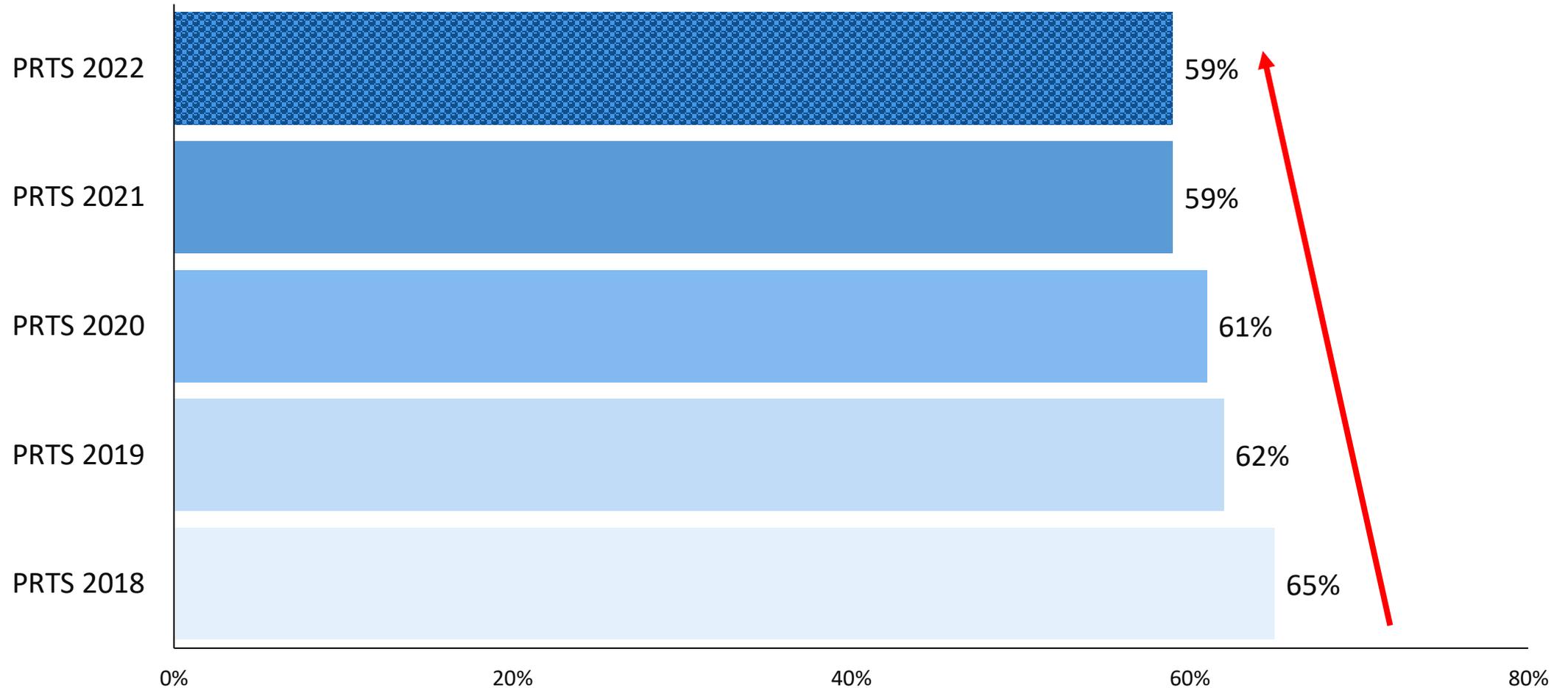
“Very Important” features among those planning on buying/leasing (or already bought) a new vehicle in 2022



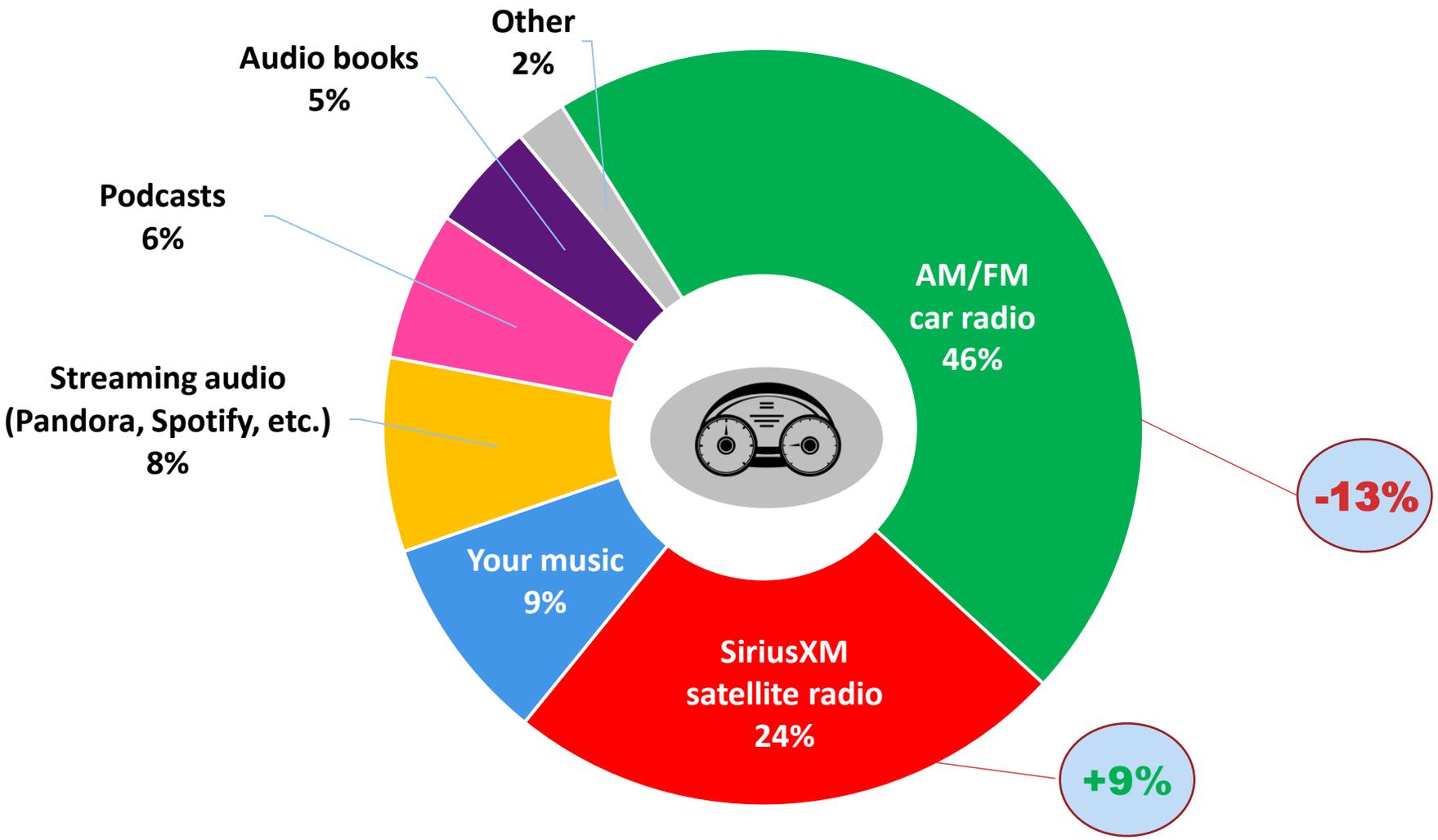
Broadcast Radio Continues Its In-Car Audio Dominance

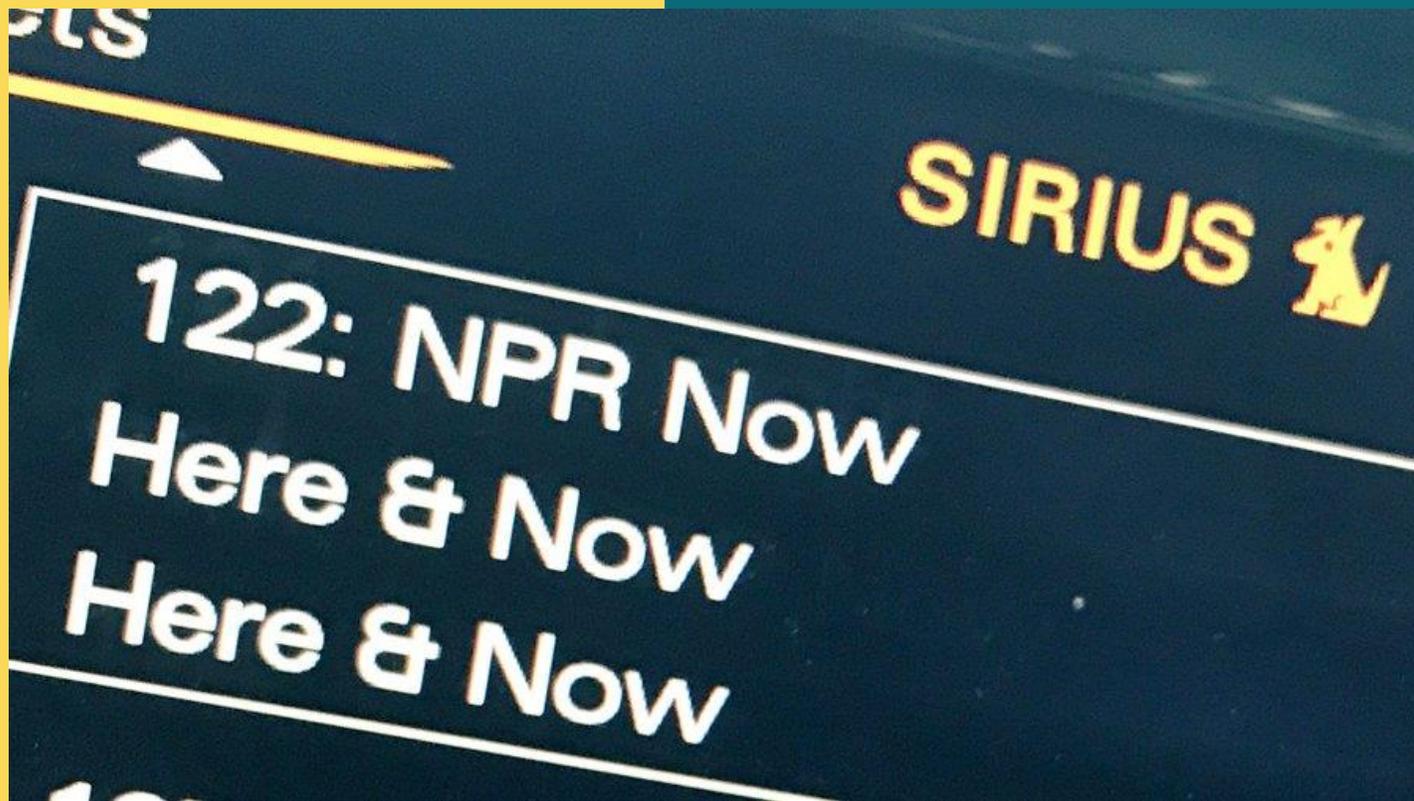


But AM/FM Radio Listening in the Car Continues to Erode



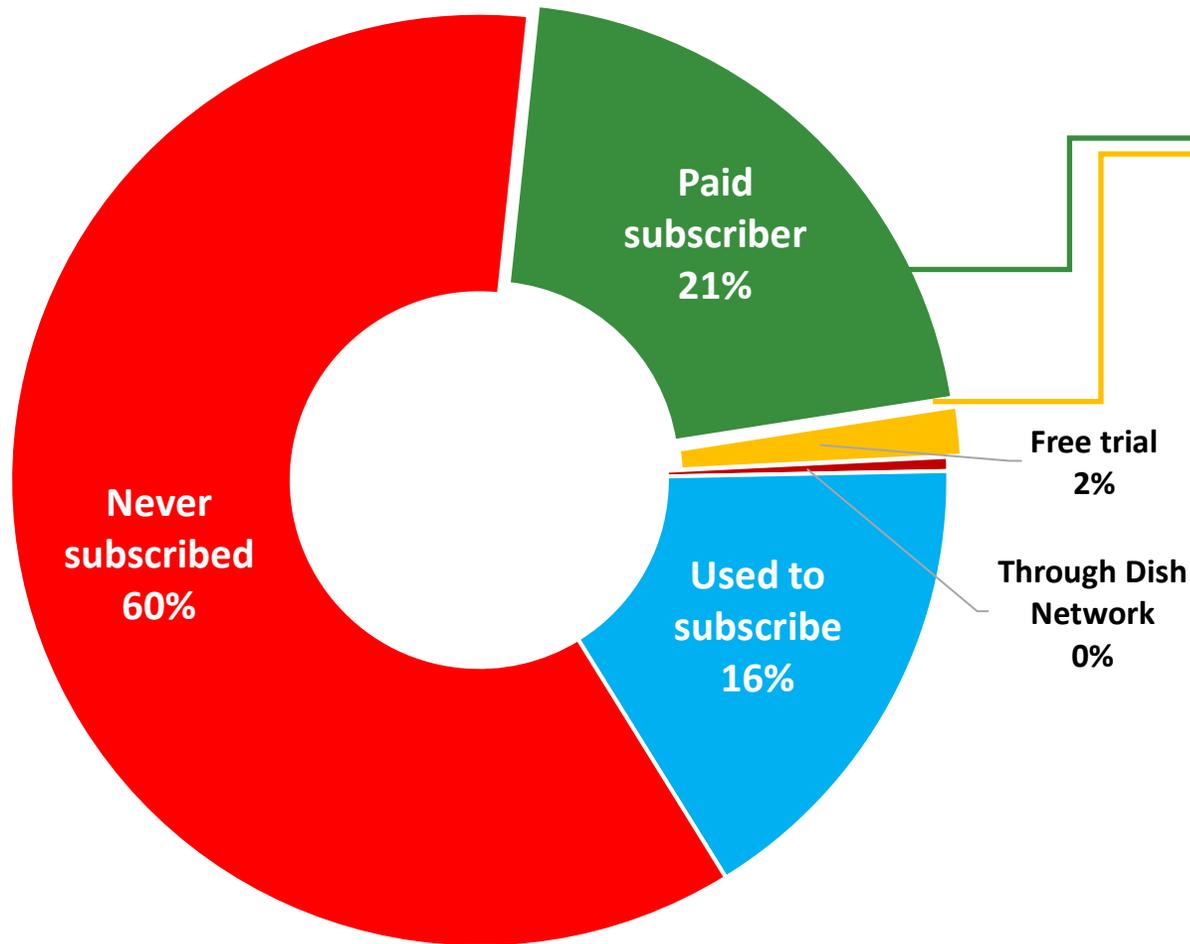
Among Those Who Own Cars With “Connected Systems,” a Majority of Time Spent With Audio Is Digital or SXM



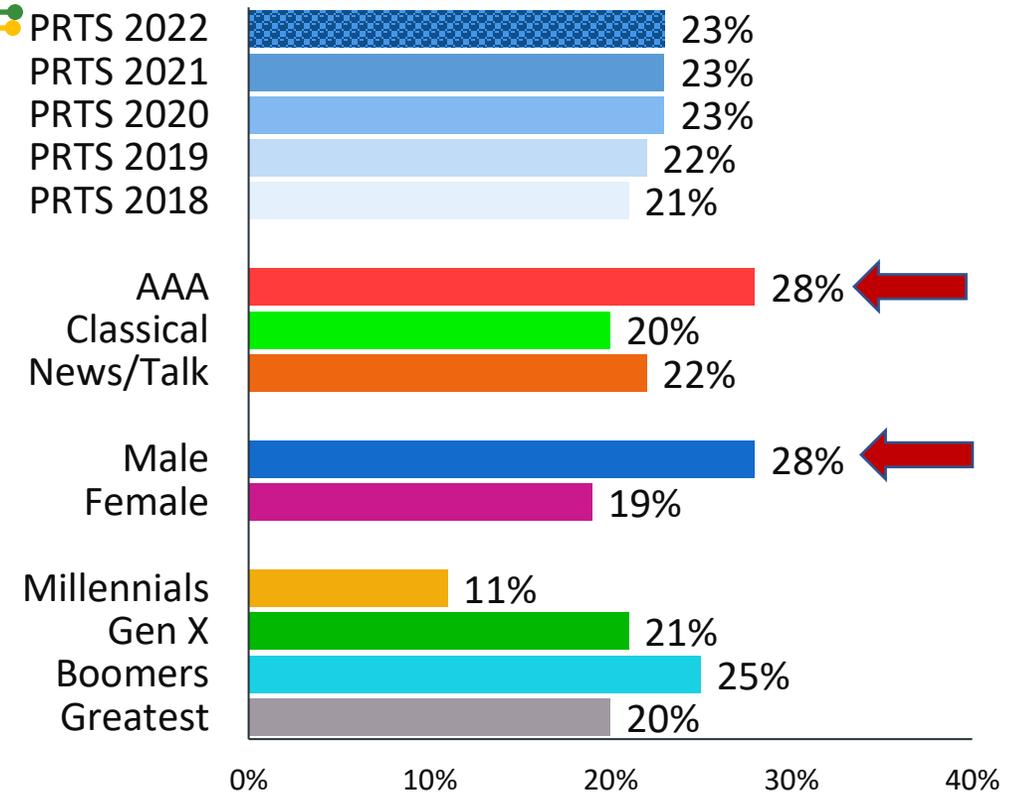


Satellite radio may be the most erosive competitor, but its growth is stalling.

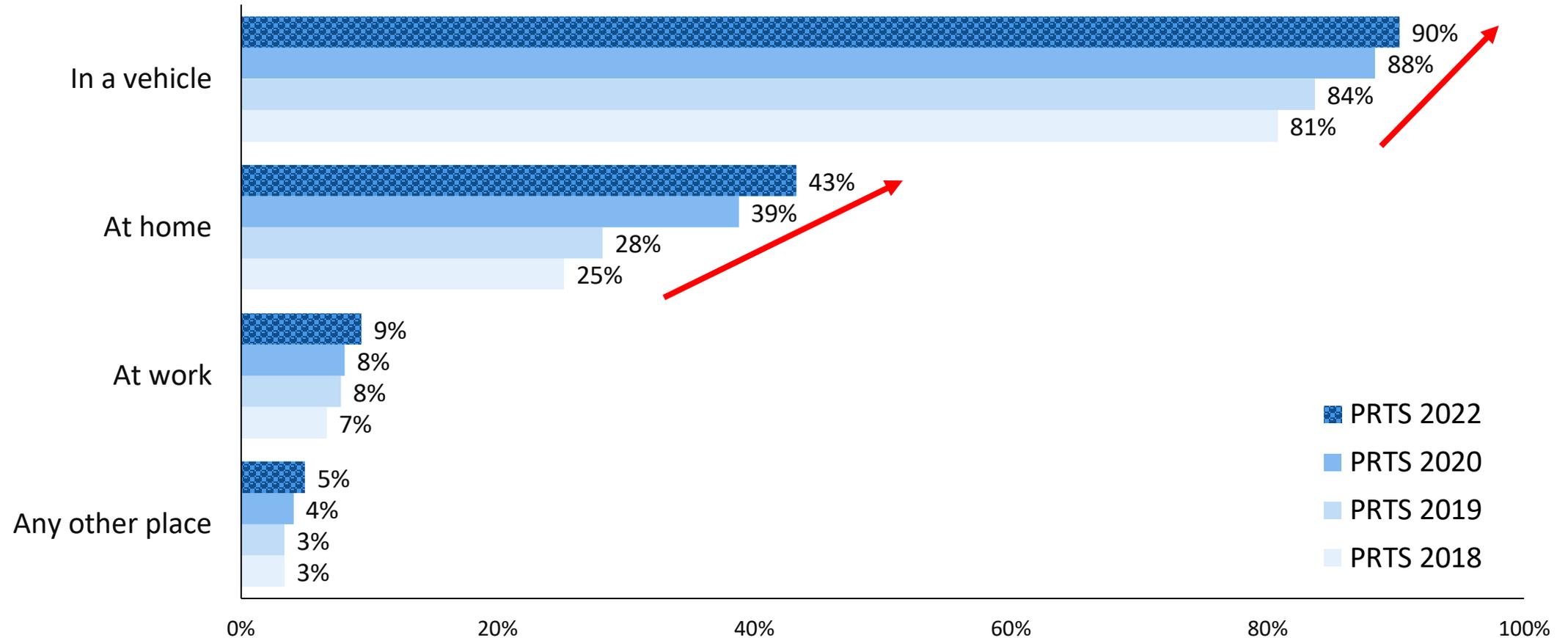
Just Under One in Four Has a SiriusXM Subscription, Especially Men, Triple A Fans, and Baby Boomers



% Who Have a SiriusXM Satellite Radio Paid/Free Trial Subscription

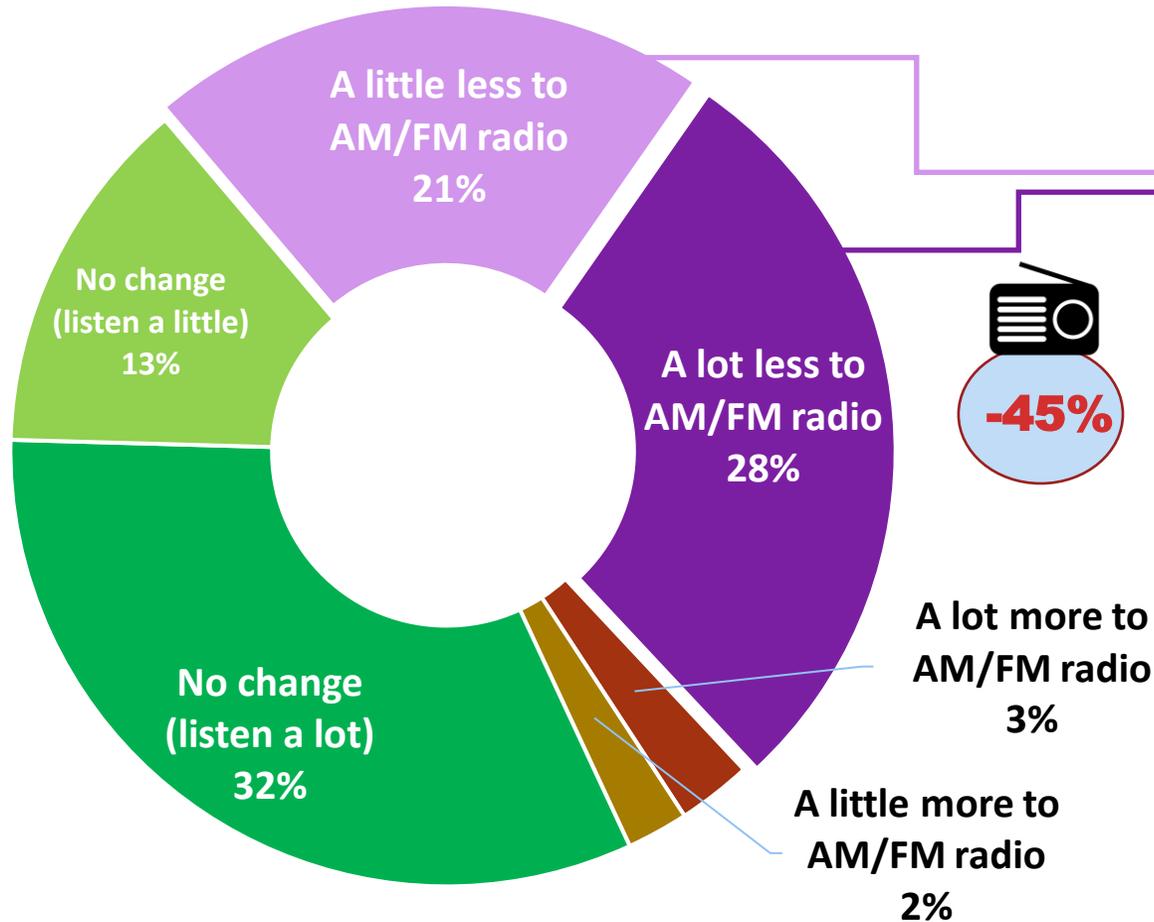


The Majority of SXM Subscribers Listen In Cars, But At-Home Usage Is Becoming More Prevalent

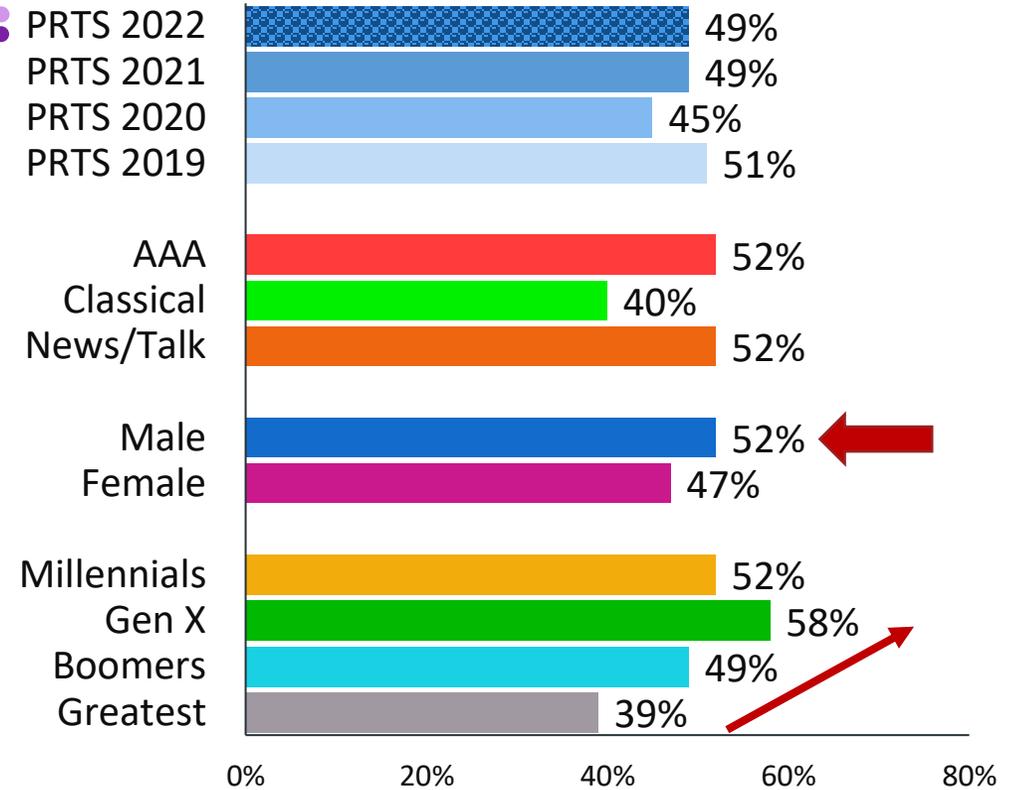


% of SiriusXM satellite radio paid or free/trial subscribers who listen to the service in each location on an average weekday

About Half of SiriusXM Subscribers Report Spending Less Time Listening to AM/FM Radio Since Getting Satellite Radio



% of SiriusXM Paid/Trial Subscribers Spending Less Time (A Lot + A Little) With AM/FM Radio Since Getting Satellite Radio

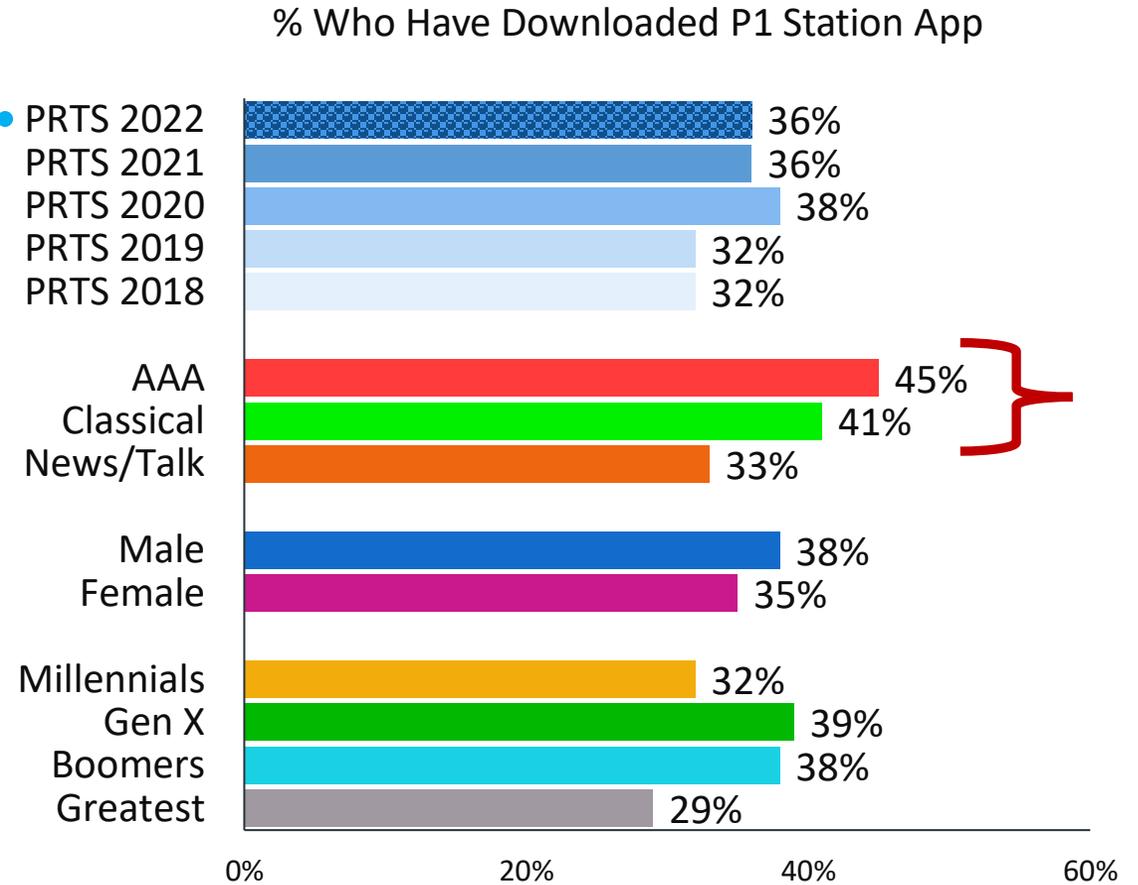
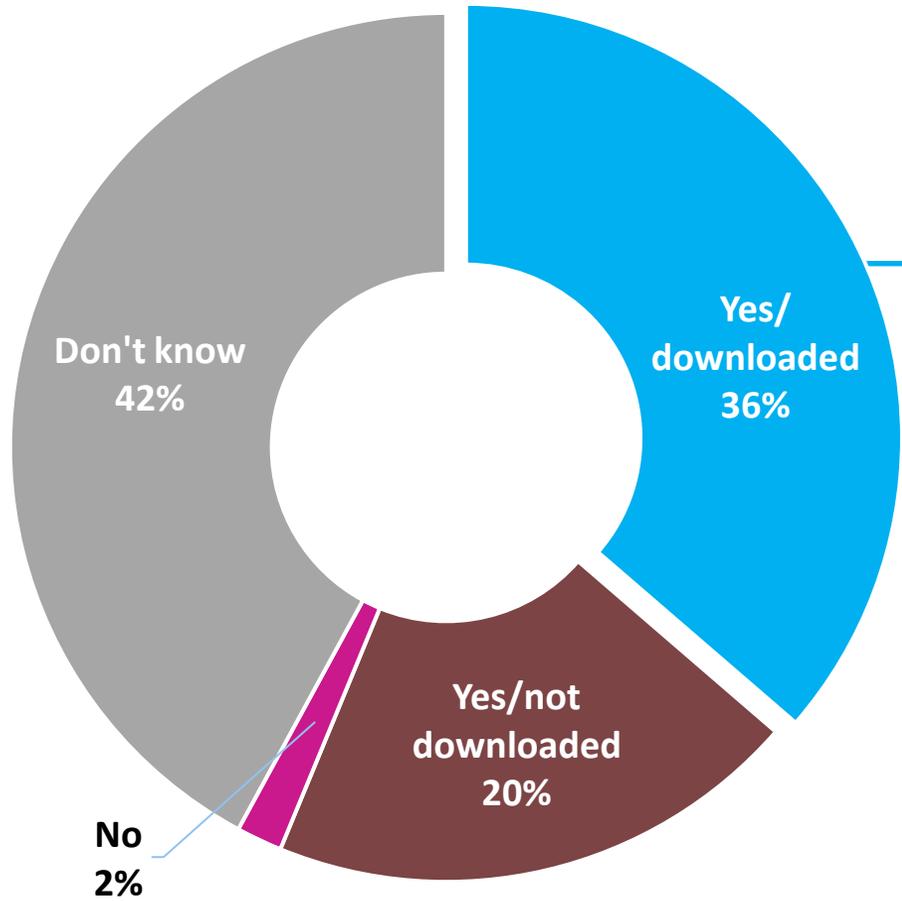


“How has your listening to AM/FM radio stations changed overall since you’ve had access to SiriusXM?”



**Mobile
continues to
play a key
role in Public
Radio content
consumption.**

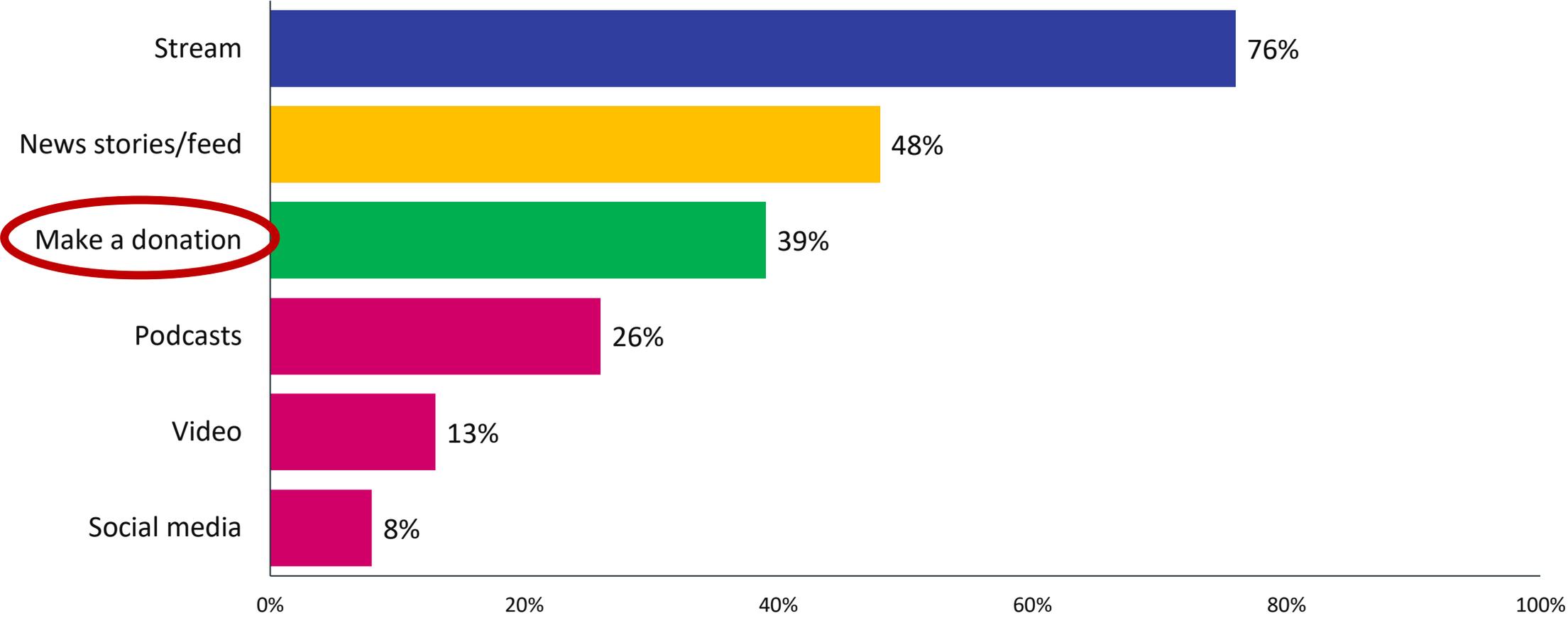
More Than One in Three Mobile Device Owners Has Downloaded Their P1 Station's App, Highest Among Music Fans



Among smartphone and/or tablet owners

The Stream Is the Most Used Feature Among Those Who Have Downloaded their P1 Station's App; Half Use the News Feed

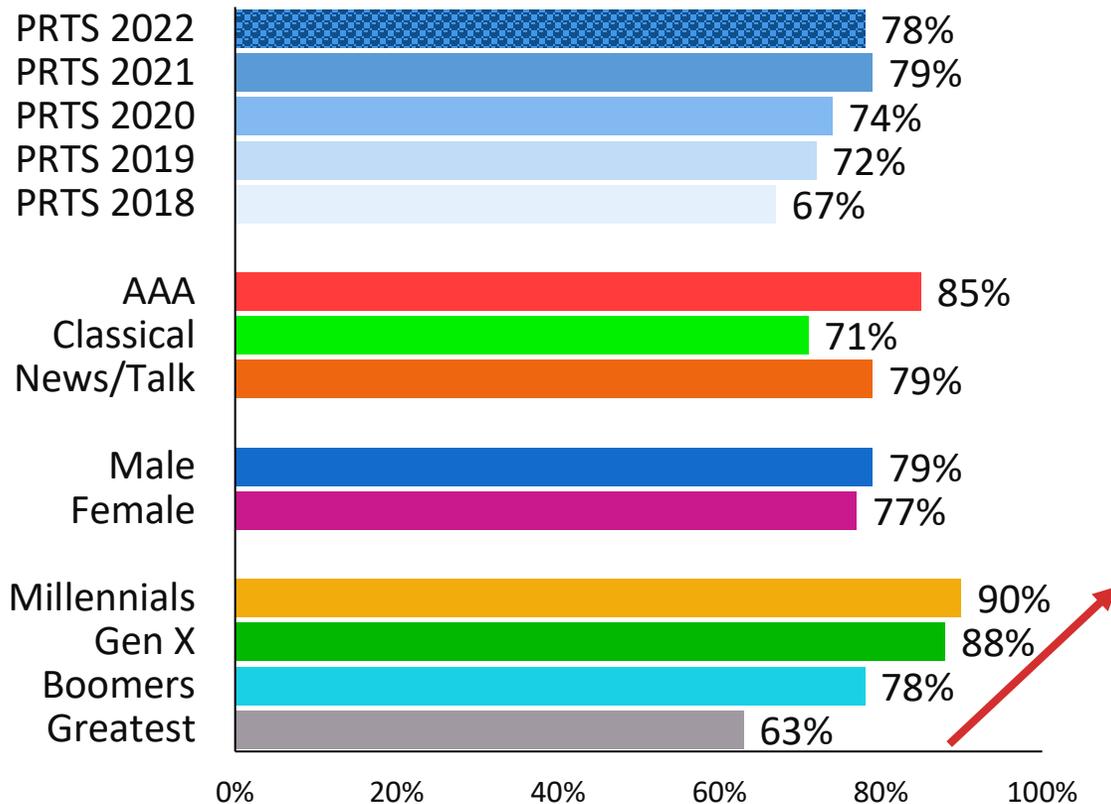
% Who Use Each P1 Station App Feature "Frequently" or "Occasionally"



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

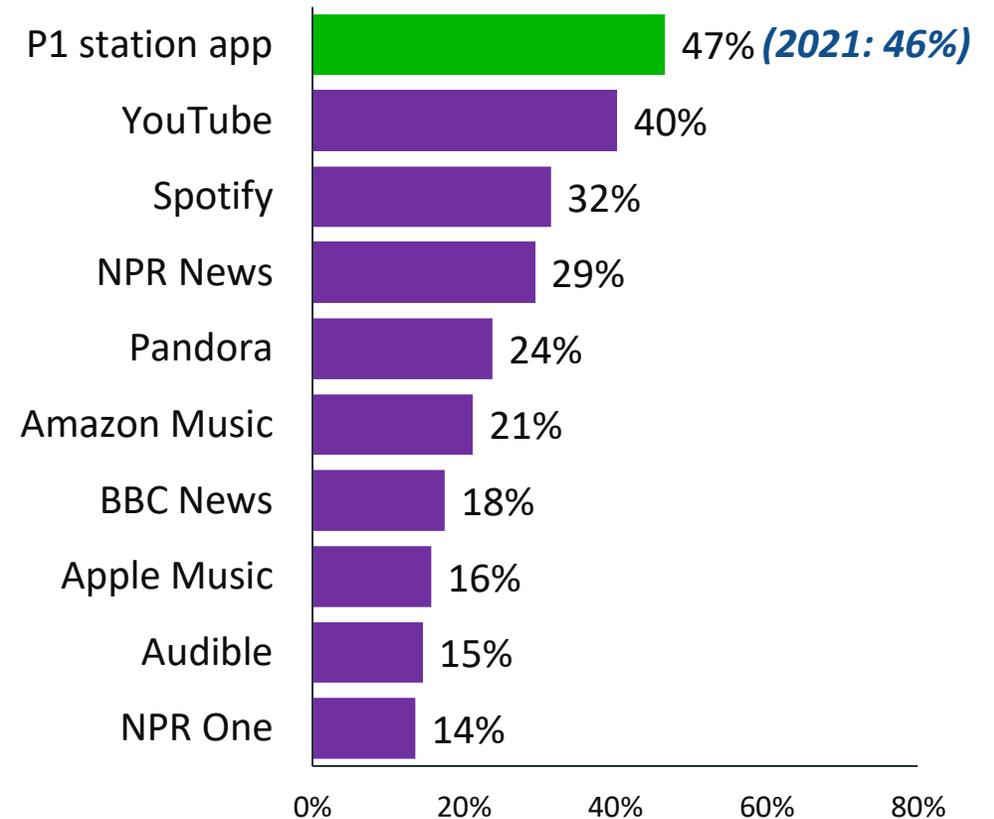
About Four in Five Have Downloaded a News/Radio/Music App on Their Mobile Device; the P1 Station App Is Most Downloaded

% 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

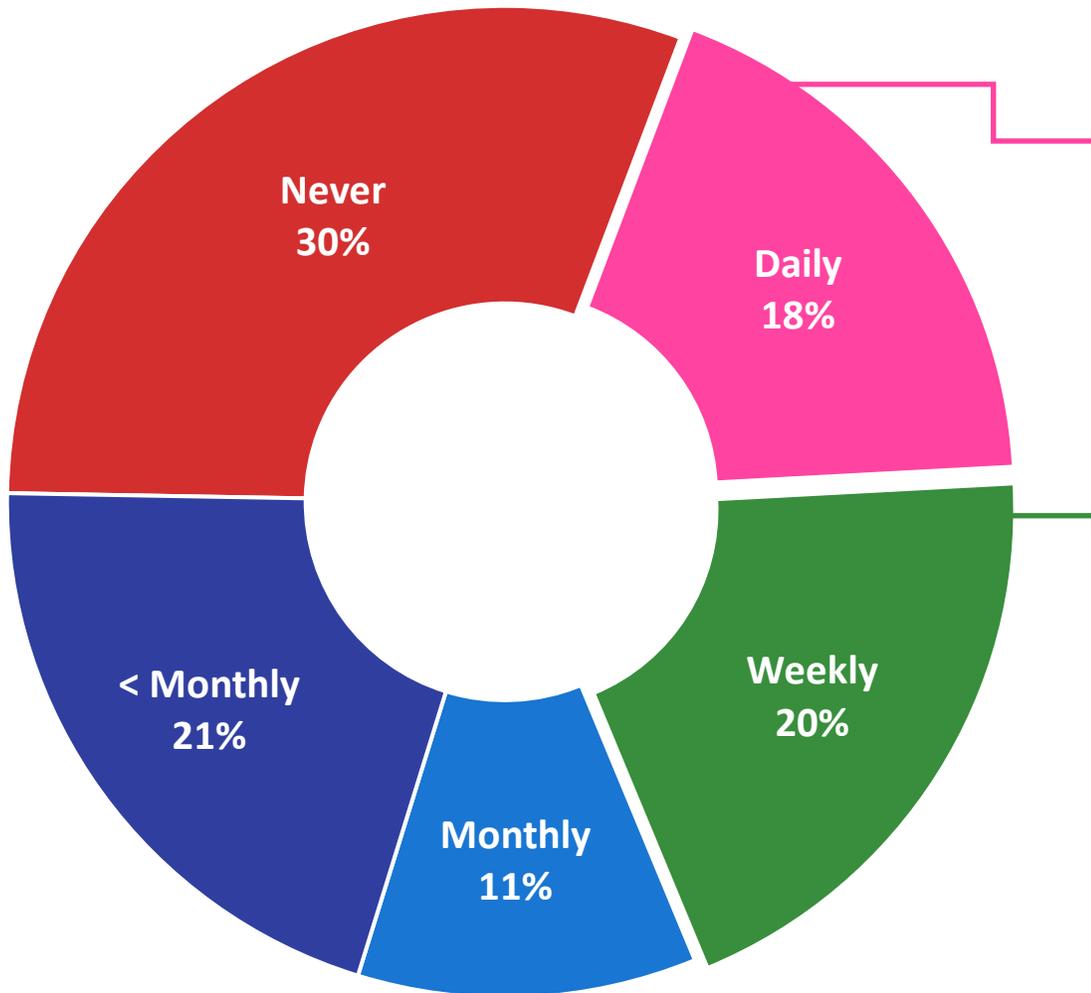


Among those who have downloaded a news/radio/music app
(Top 10 apps downloaded shown)

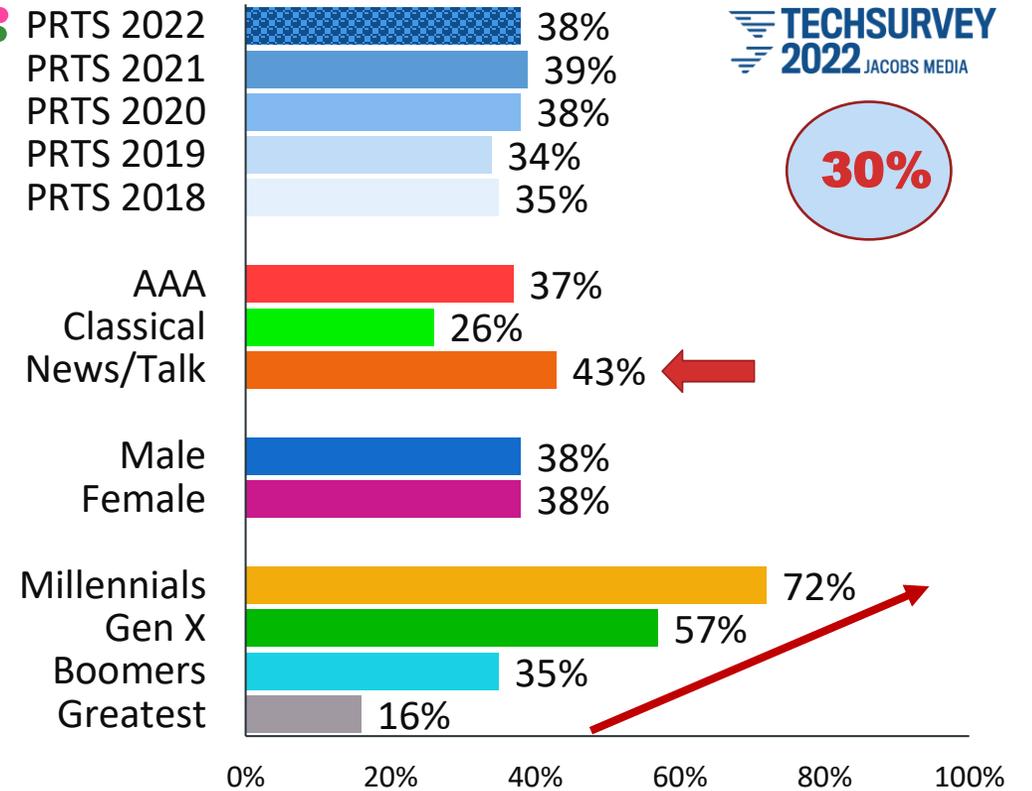


Among core
Public Radio
listeners,
usage &
momentum of
podcasts
appears to be
slowing.

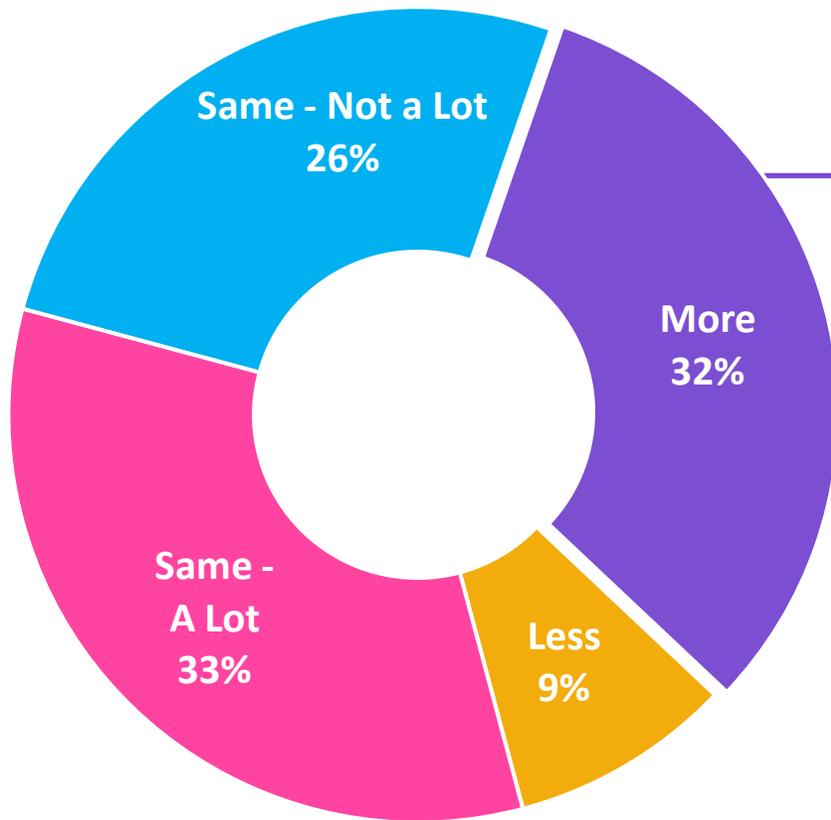
Podcasts Reach Nearly Four in Ten Weekly, Especially Among Gen Xers, Millennials and News/Talk Fans



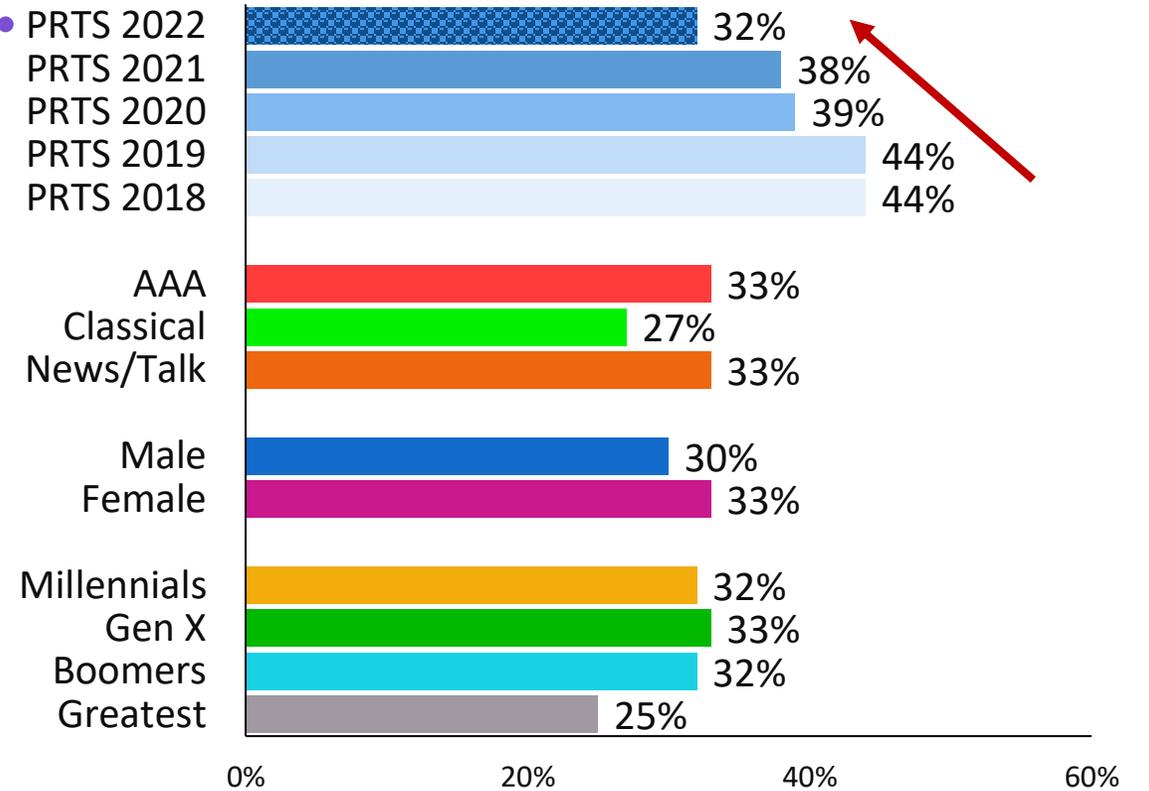
% Who Listen to Podcasts/On-Demand Audio Weekly or More



Podcast Momentum Has Cooled Considerably During the Past 5 Years

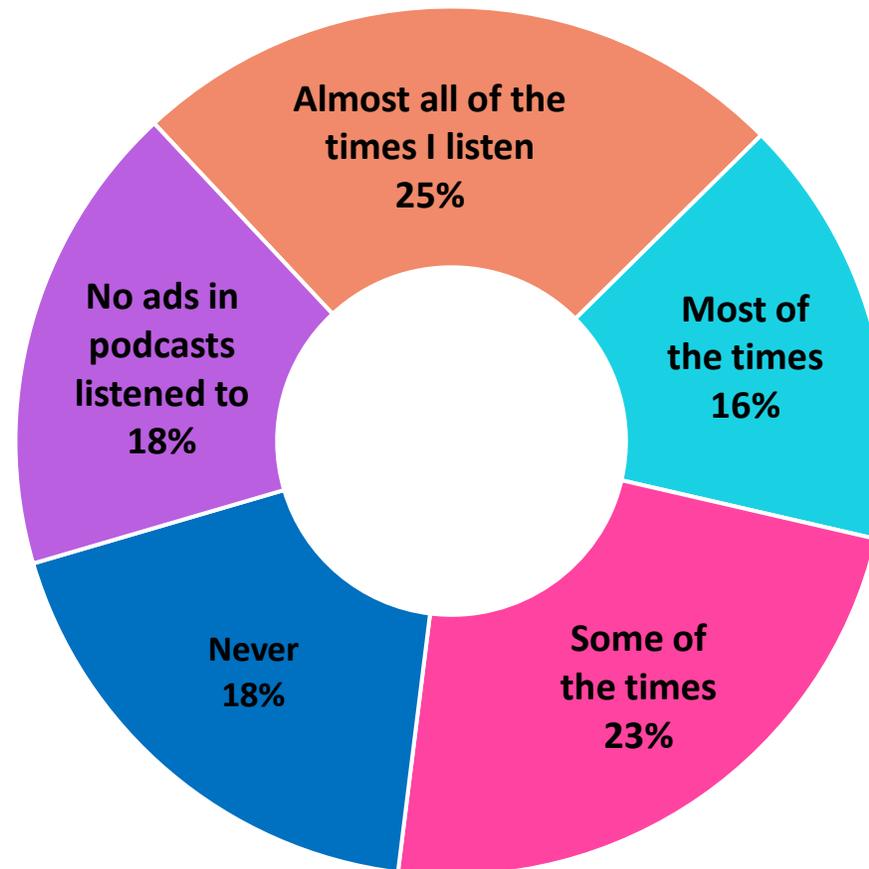


% of Weekly Podcast Listeners Who Say They Are Listening to Podcasts/On-Demand Audio More in the Past Year

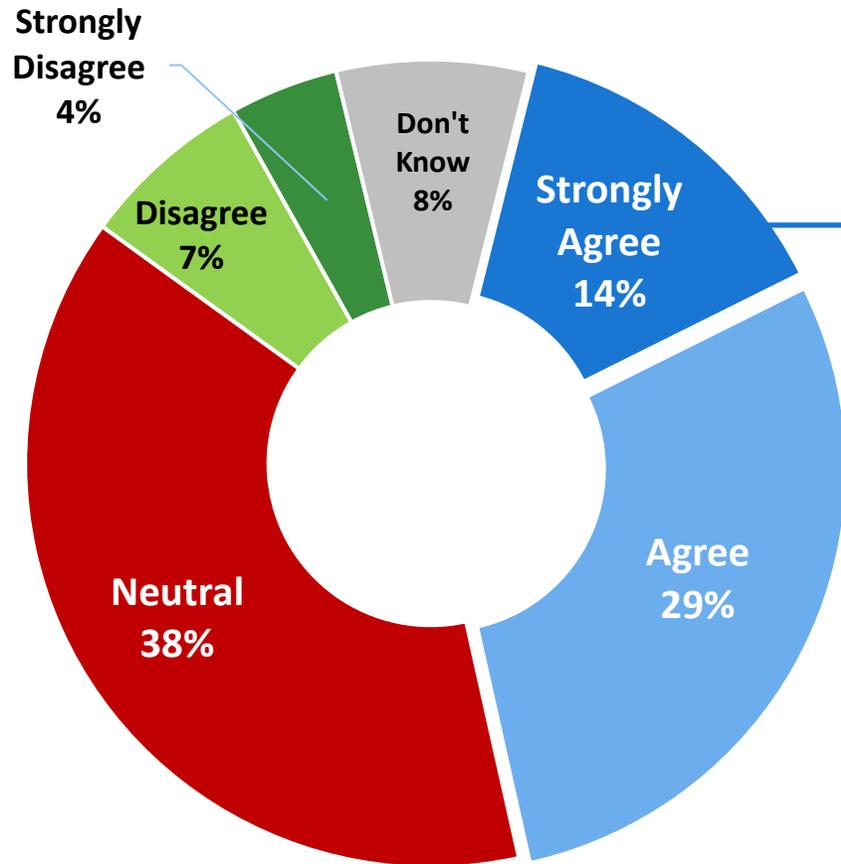


One in Four Weekly Podcast Listeners Skip Ads Almost All of the Time; About One in Five Never Skips Ads

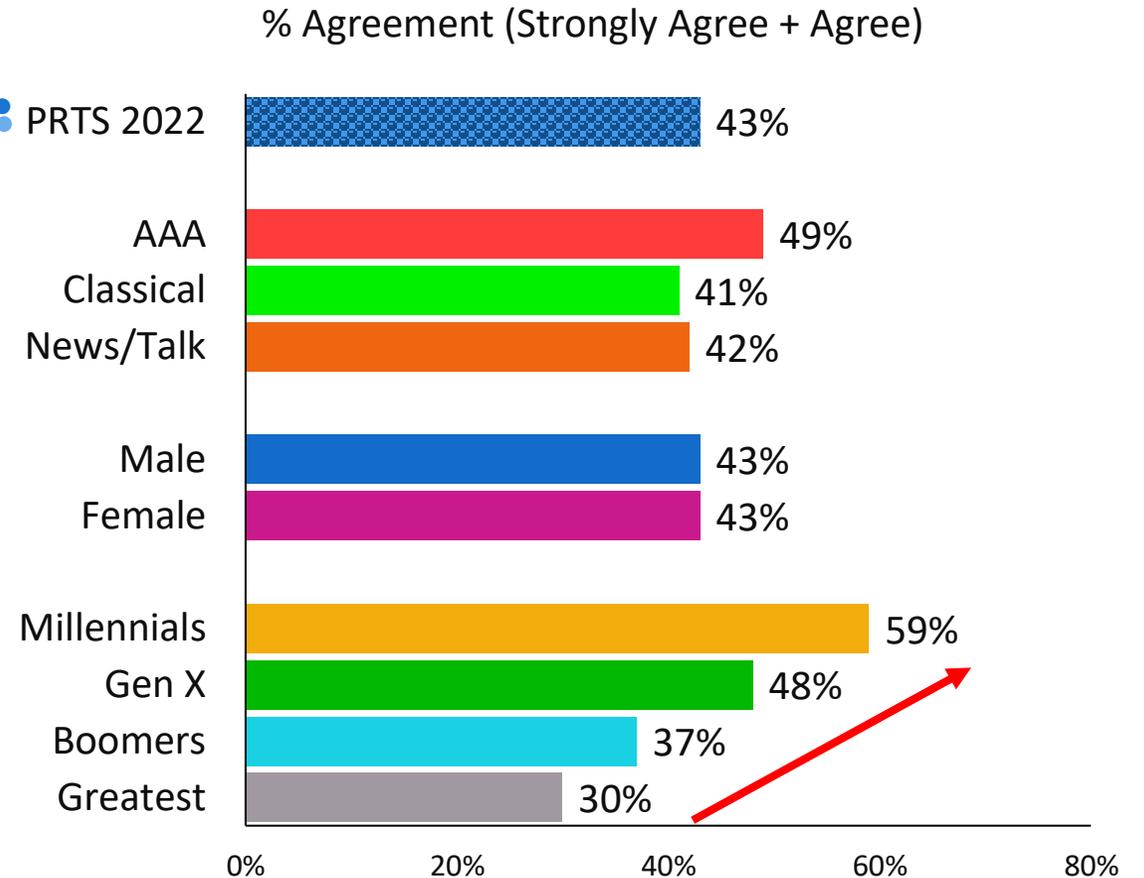
“How often do you skip through ads you hear in the podcasts you regularly listen to?”



Ads Read by Podcast Hosts Are Preferred to Produced Spots, Particularly Among Younger Generations

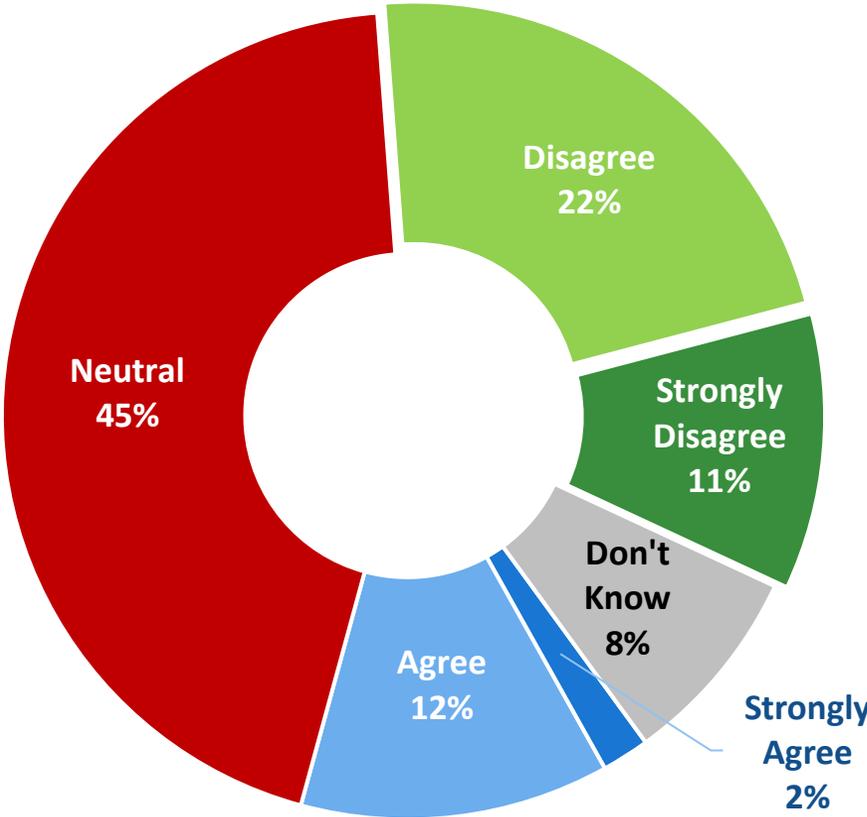


"I prefer to hear ads read by podcast hosts rather than produced ads"



Among weekly podcast listeners who hear ads in podcasts they regularly listen to

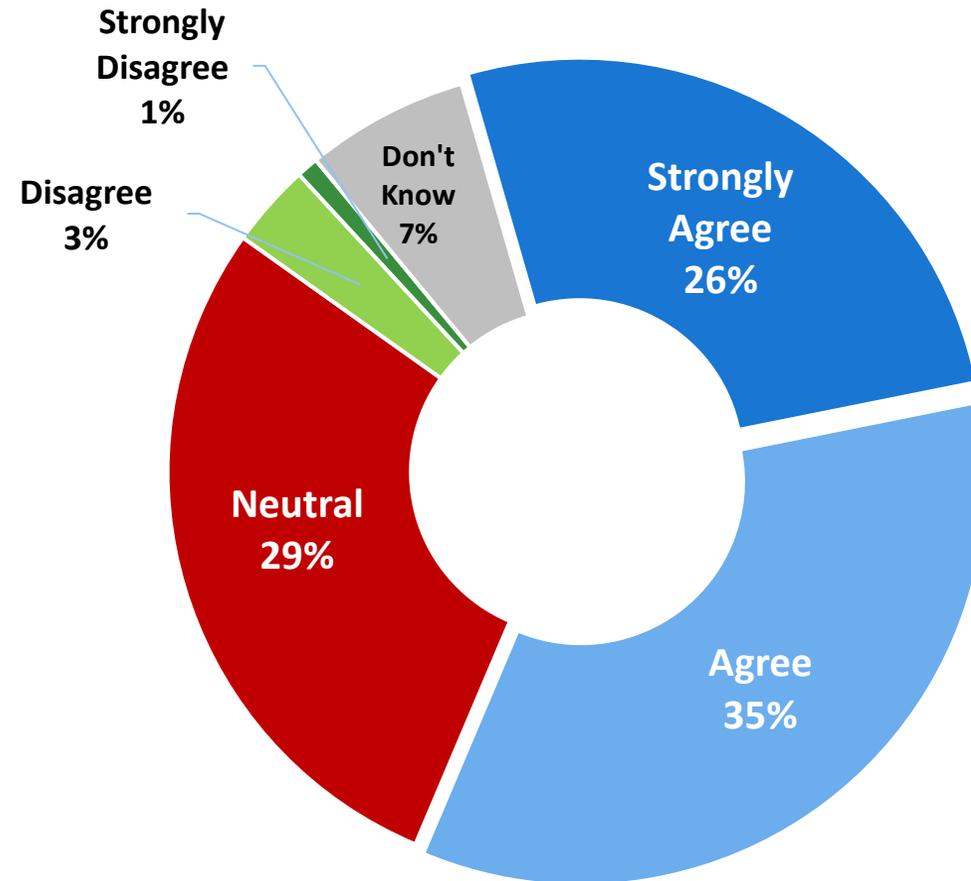
Podcast Ads Are Generally Seen as No More Credible Than Those Heard on Radio



"I find ads in podcasts to be more credible than those I hear on radio stations"

Among weekly podcast listeners who hear ads in podcasts they regularly listen to

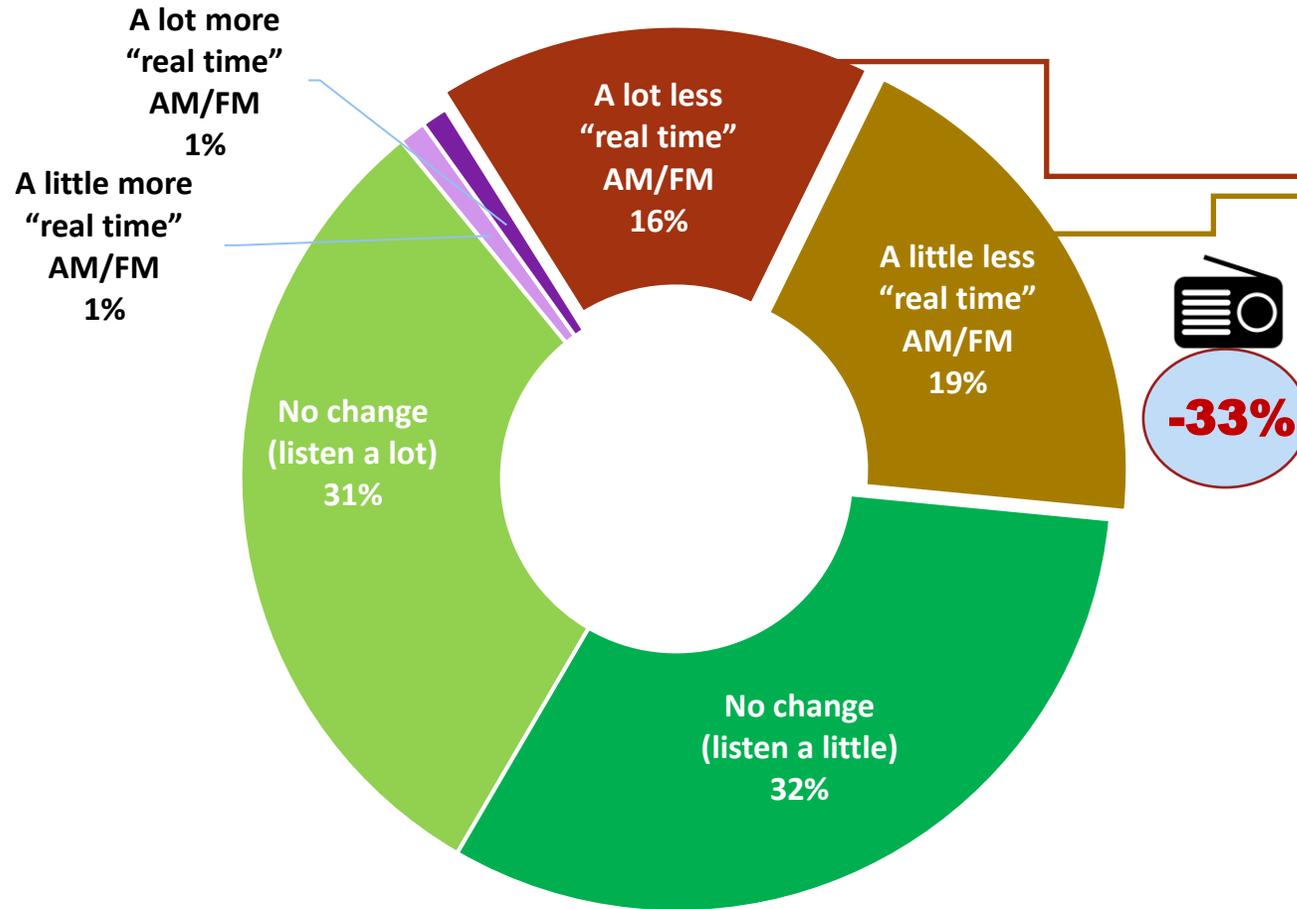
Weekly Podcast Listeners Express Fatigue With Hearing Some of the Same Podcasts Ads



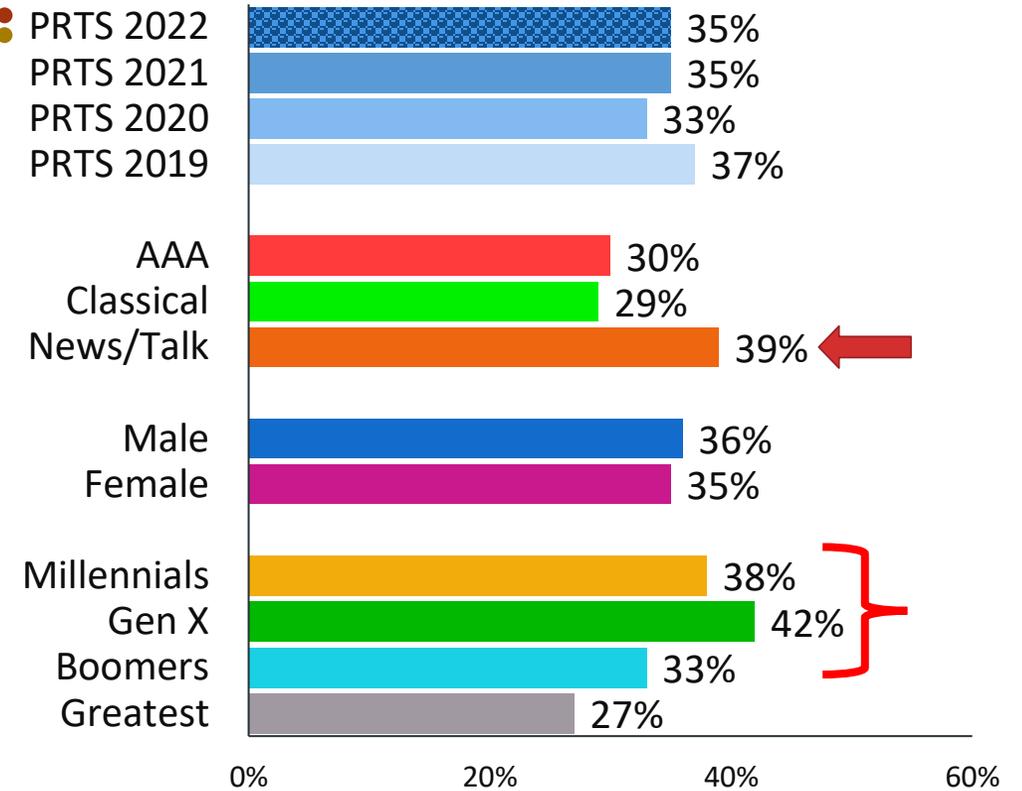
“I am getting tired of hearing the same ads in the podcasts I listen to”

Among weekly podcast listeners who hear ads in podcasts they regularly listen to

More Than One-Third of Weekly Podcast Users Spend Less Time With Radio, Especially News/Talk P1s



% of Weekly Podcast Listeners Spending Less Time (A Lot + A Little) With "Real Time" AM/FM Radio

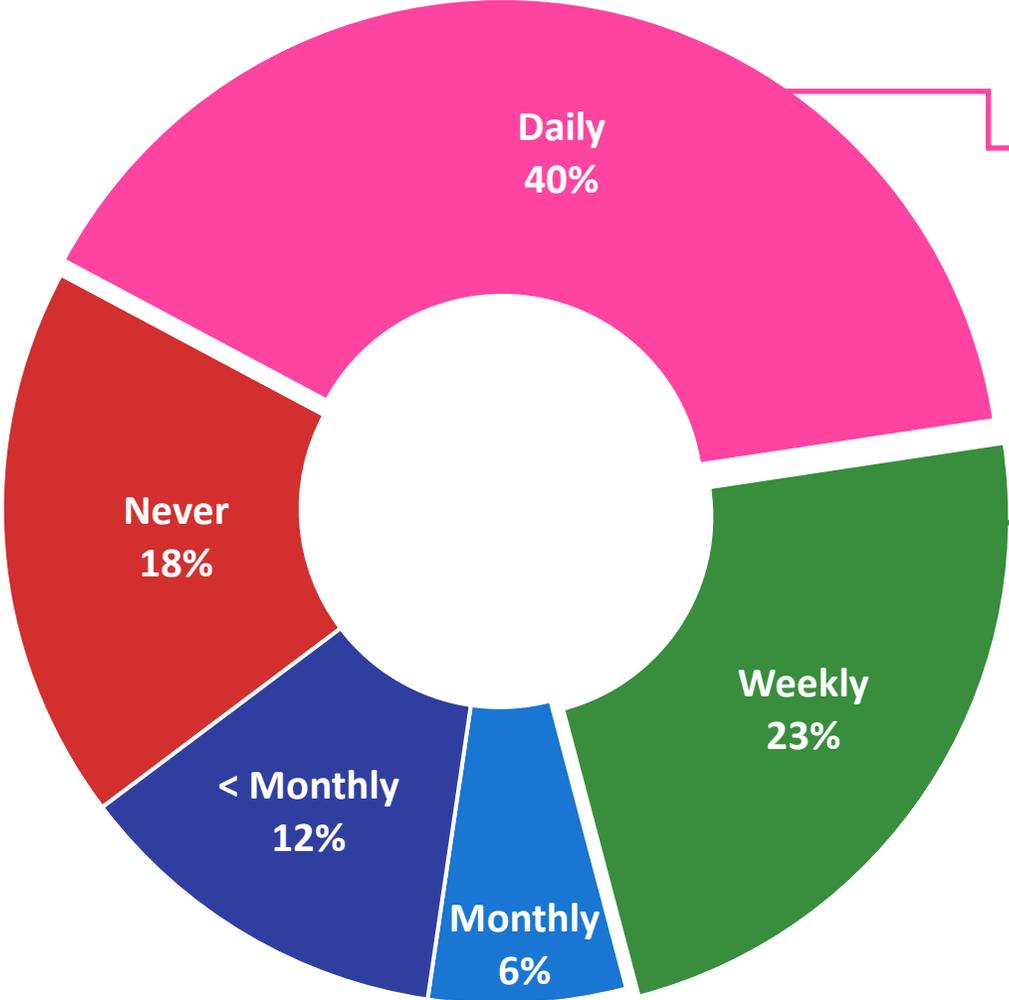


"As a result of listening to podcasts, how has it impacted your 'real time' AM/FM radio listening?"

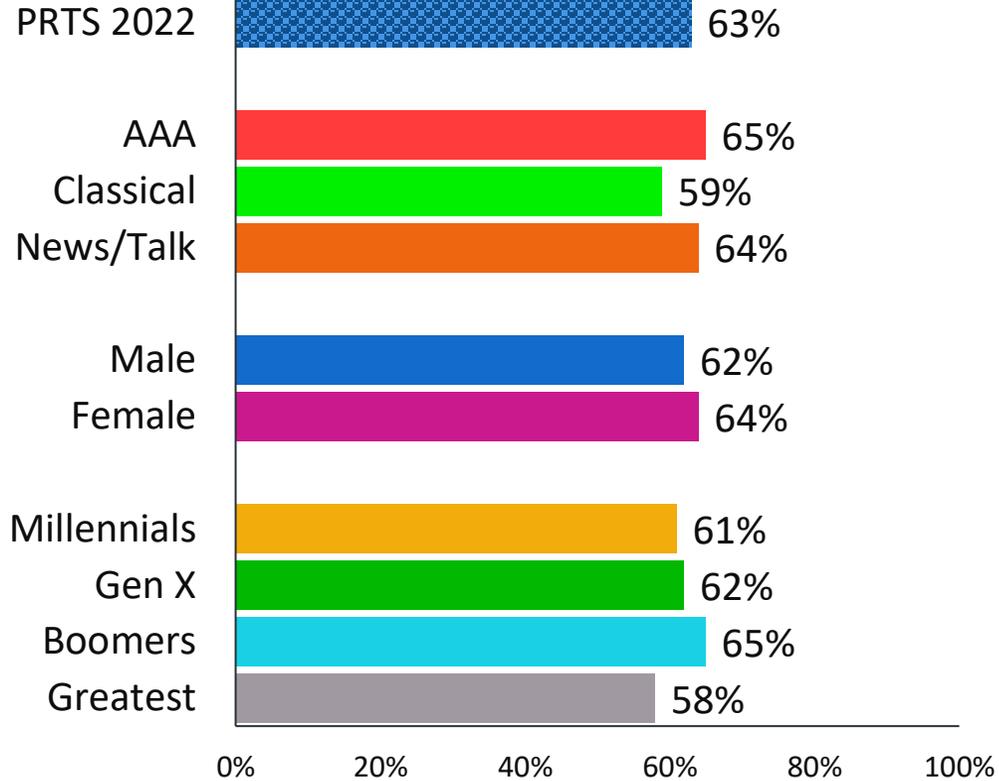


**Daily news
podcasts and local
online newsletters
are gaining in
popularity among
Public Radio fans.**

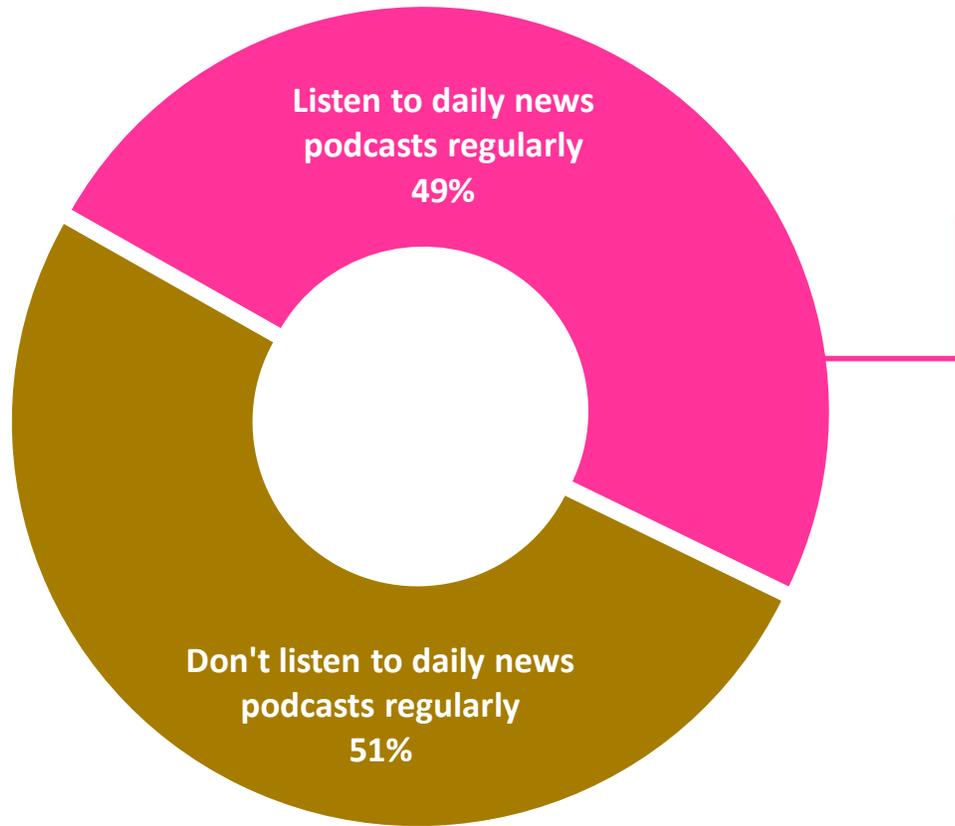
Nearly Two in Three Read Online Newsletters Featuring Coverage of Their Local Areas/Regions Weekly or More



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

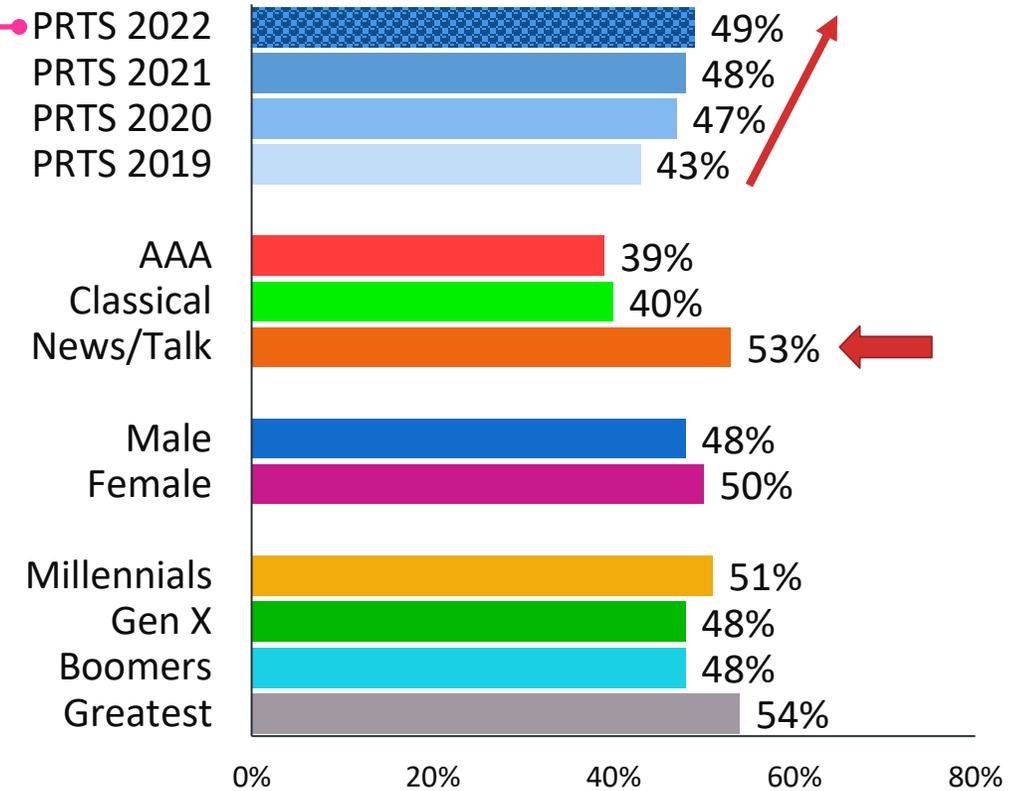


News/Talk Listeners Are Especially Likely to Access Daily News Podcasts Weekly or More

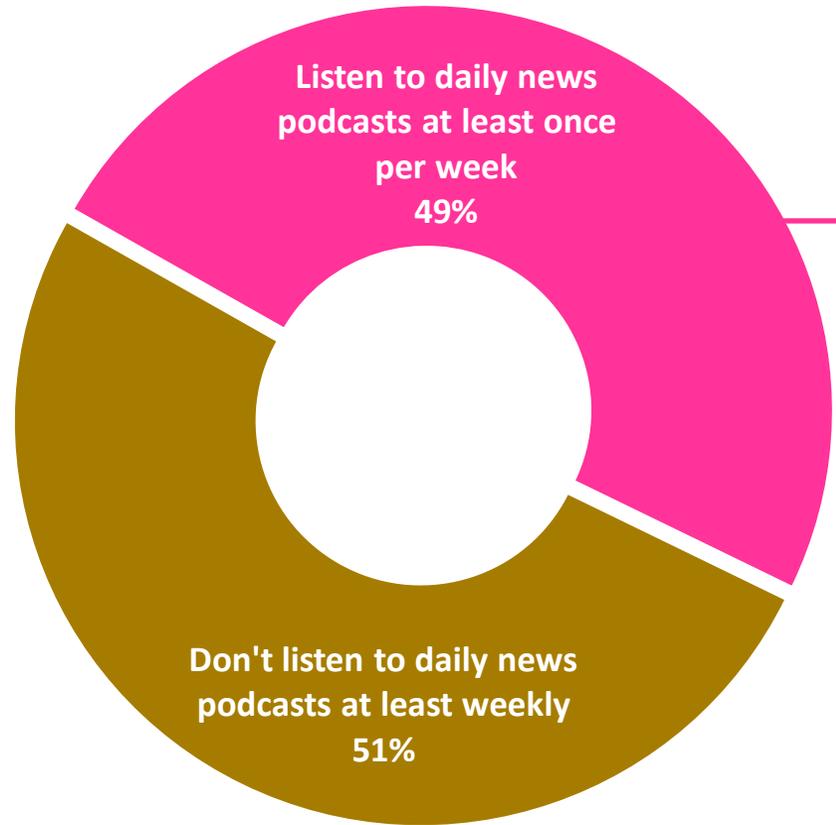


“Which of the following daily news podcasts -- featuring news and headlines each morning -- do you listen to at least once per week or more often?”

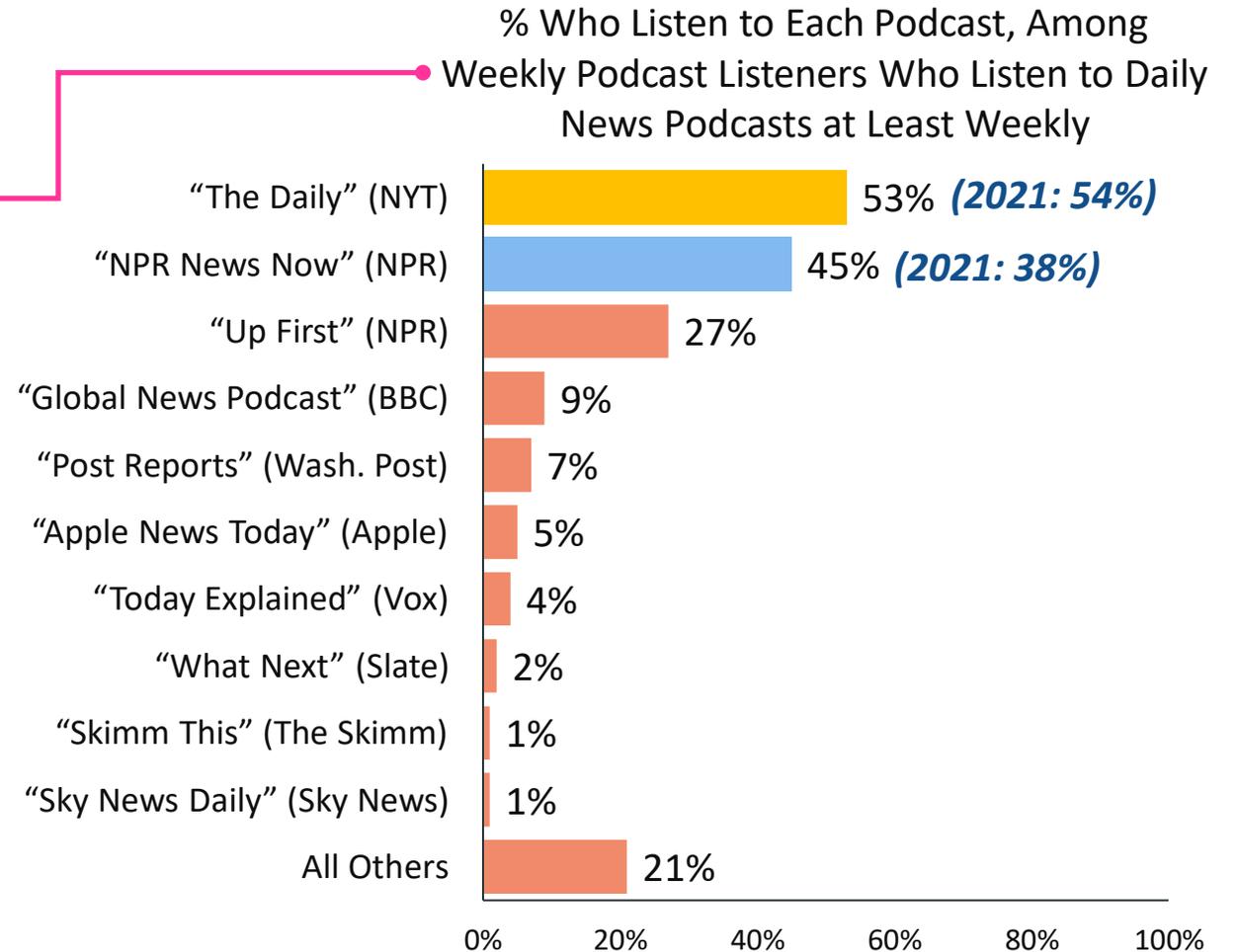
Among Weekly Podcast Listeners, % Who Listen to Daily News Podcasts at Least Weekly



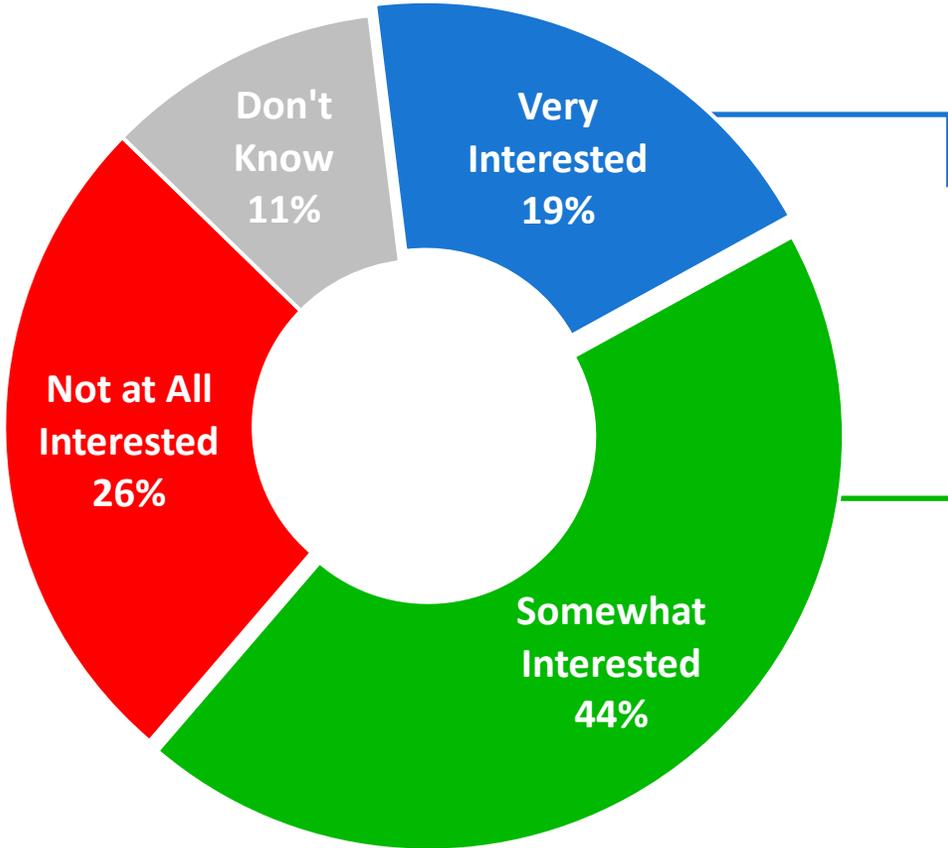
A Majority of Daily News Podcast Users Listen to “The Daily” At Least Weekly, With “NPR News Now” Closing the Gap



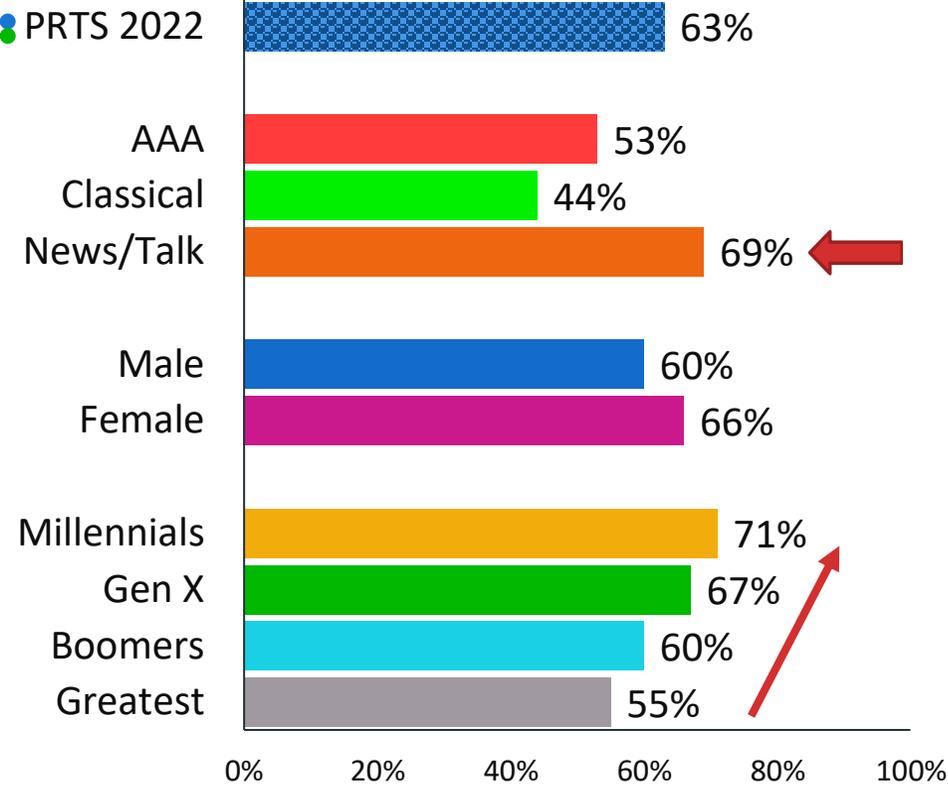
“Which of the following daily news podcasts -- featuring news and headlines each morning – do you listen to at least once per week or more often?”



Nearly Two in Three Weekly Podcast Listeners Show Interest in a Daily Morning Podcast From Their P1 Station



% Very or Somewhat Interested in a Daily Morning Podcast From Their P1 Station Covering Local/Region News & Events

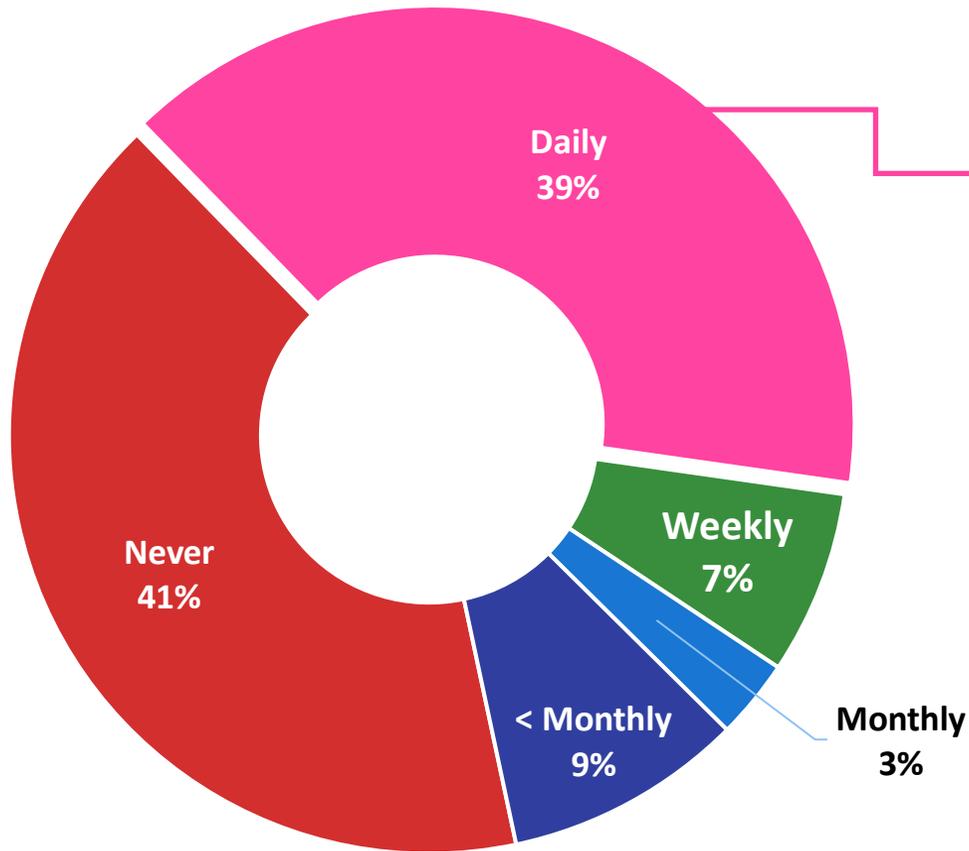


“How interested would you be in a daily morning podcast produced by THE STATION THAT SENT YOU THIS SURVEY covering local/regional news and events?”

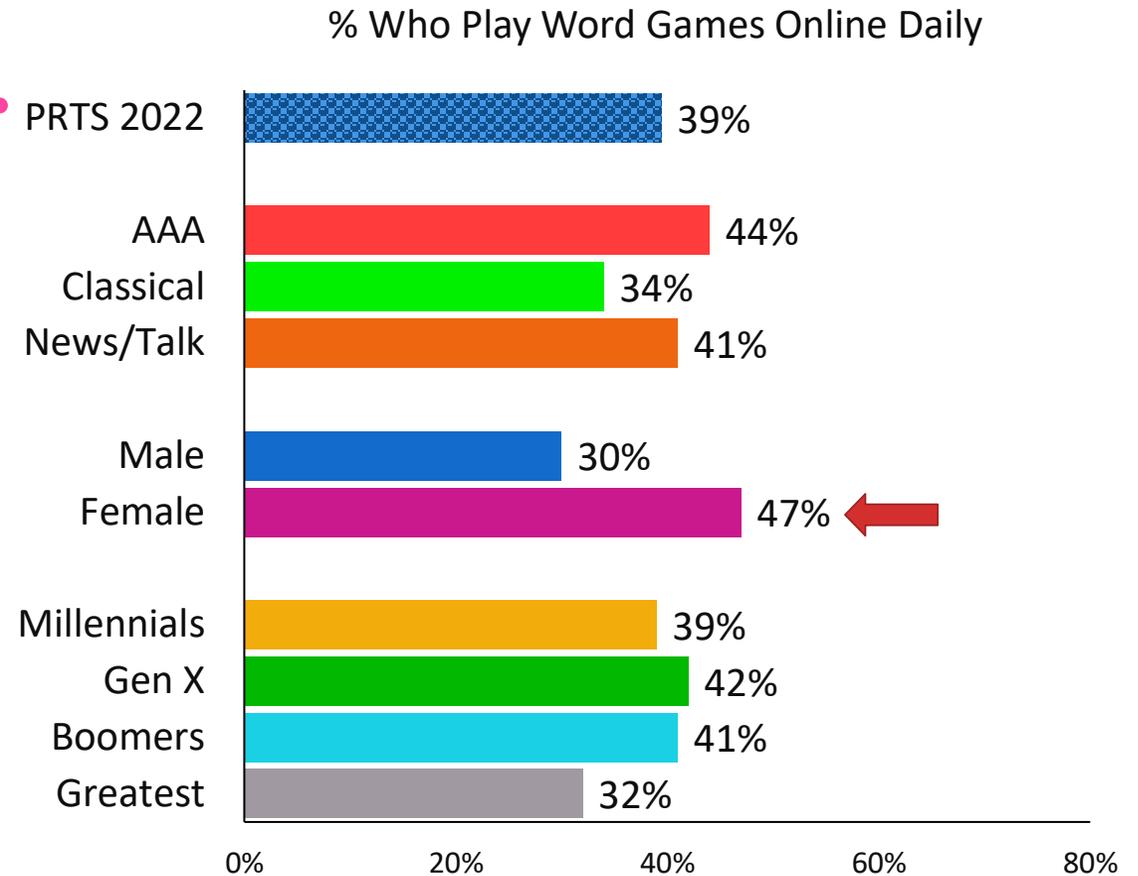


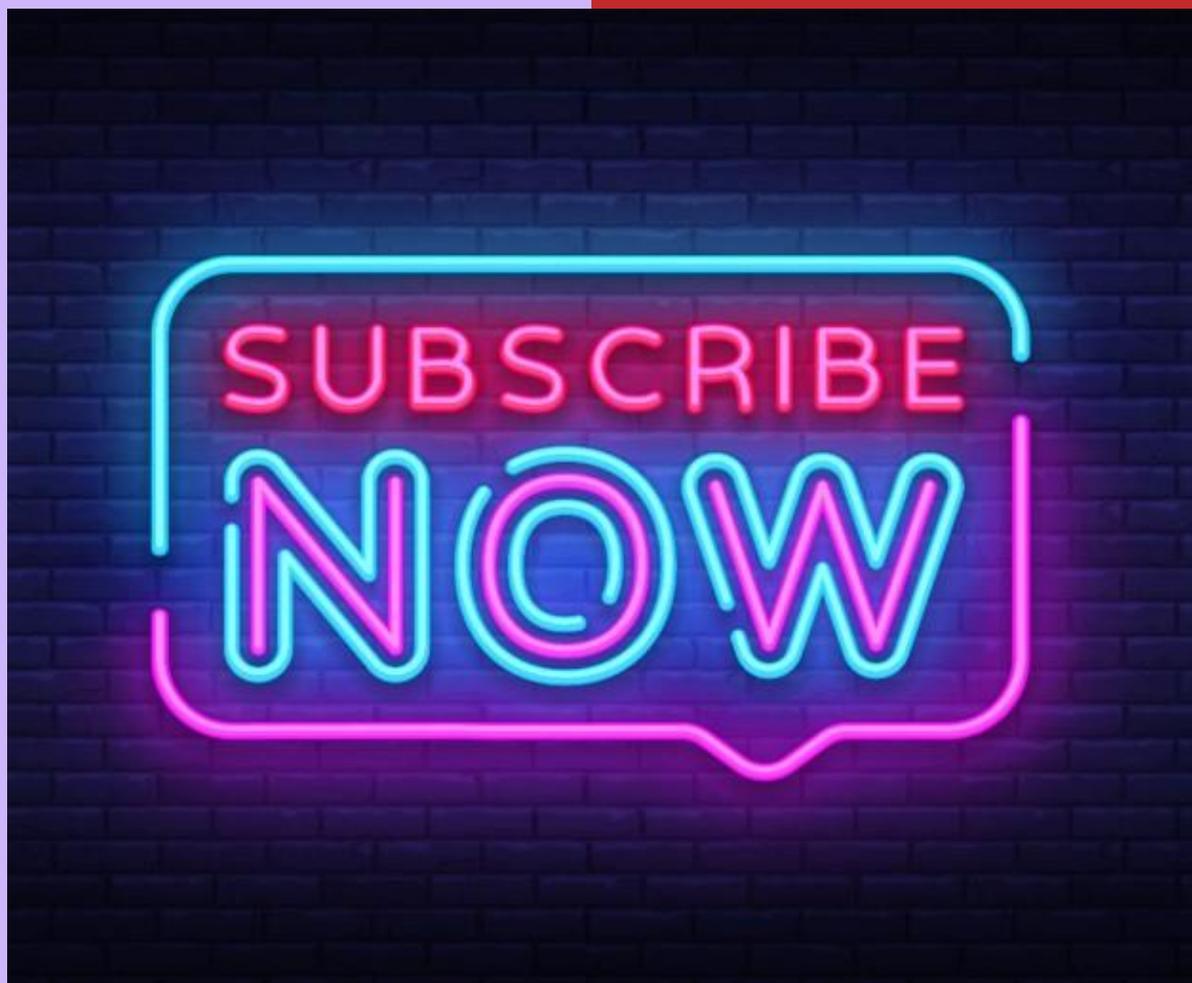
Among the core
Public Radio
audience, online
word games are
hugely popular.

Nearly Four in Ten Play Online Word Games Every Day, Especially Women



“How often do you play word games online (i.e. Wordle, Spelling Bee, online crossword puzzles, etc.)?”

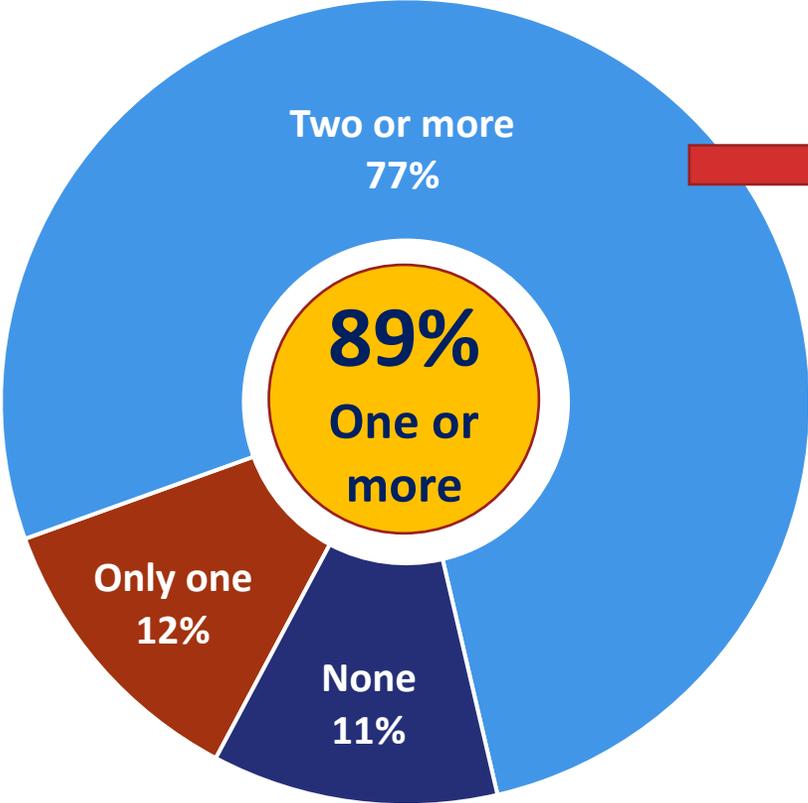




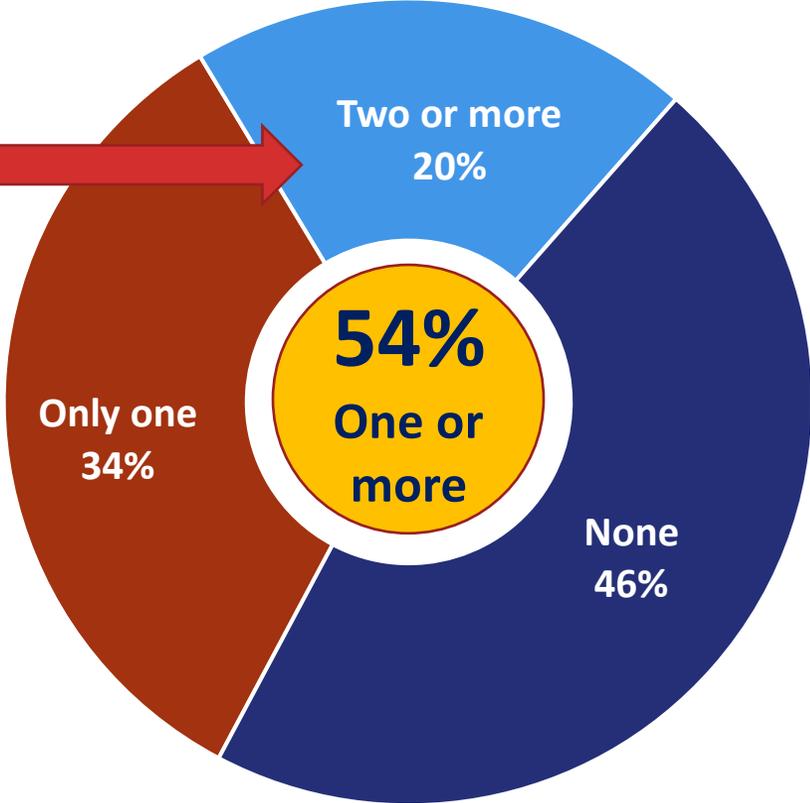
The subscription economy is growing strong as Public Radio fans continue to pay for audio and video content.

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

Paid **VIDEO** Streaming Subscriptions



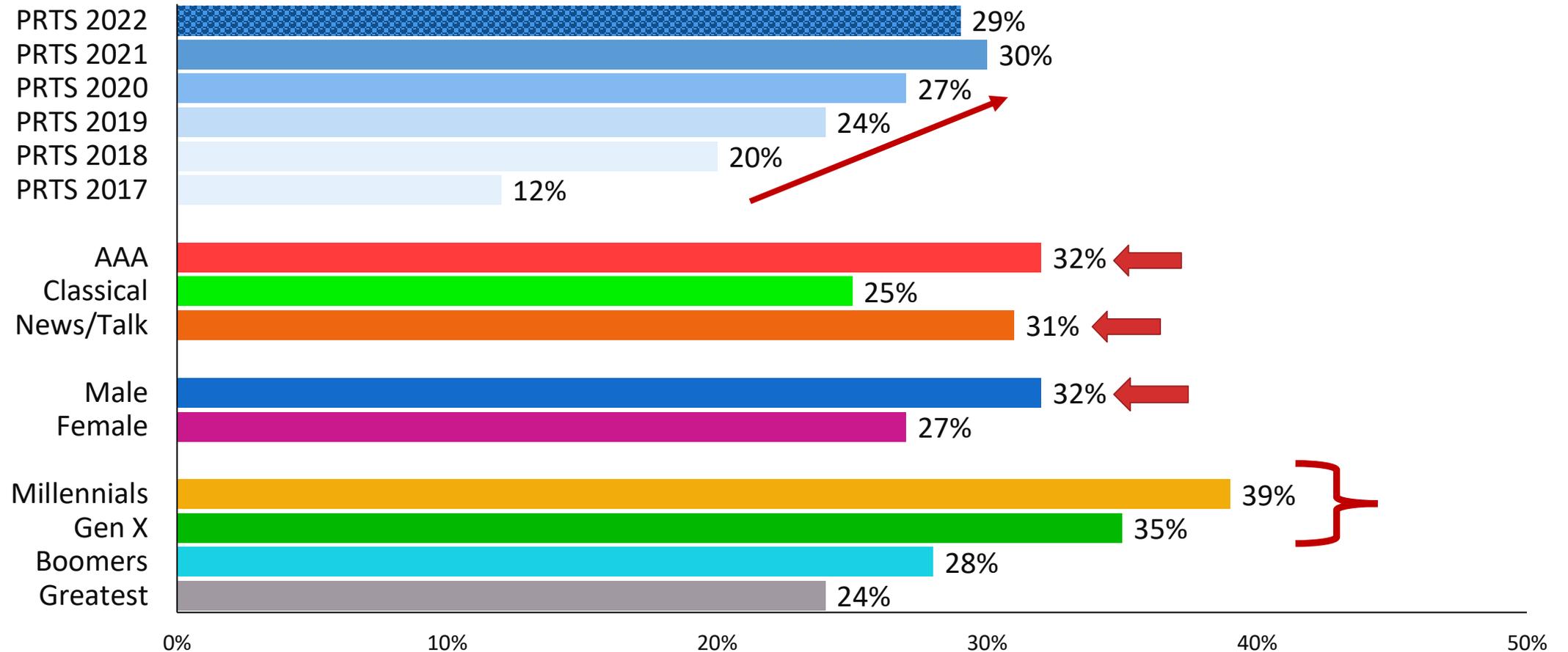
Paid **AUDIO** Streaming Subscriptions





**Smart speaker growth has flatlined,
but current owners keep buying more
of them.**

Smart Speaker Growth Has Stalled



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

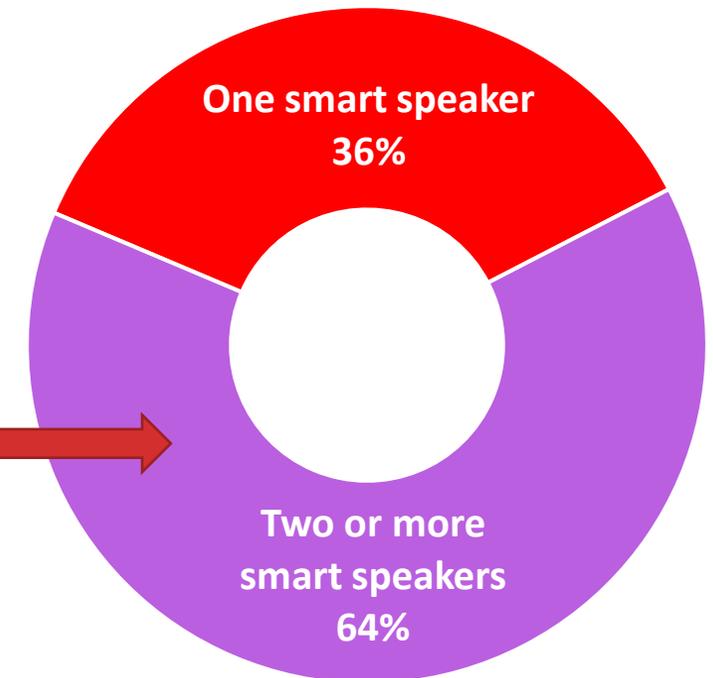
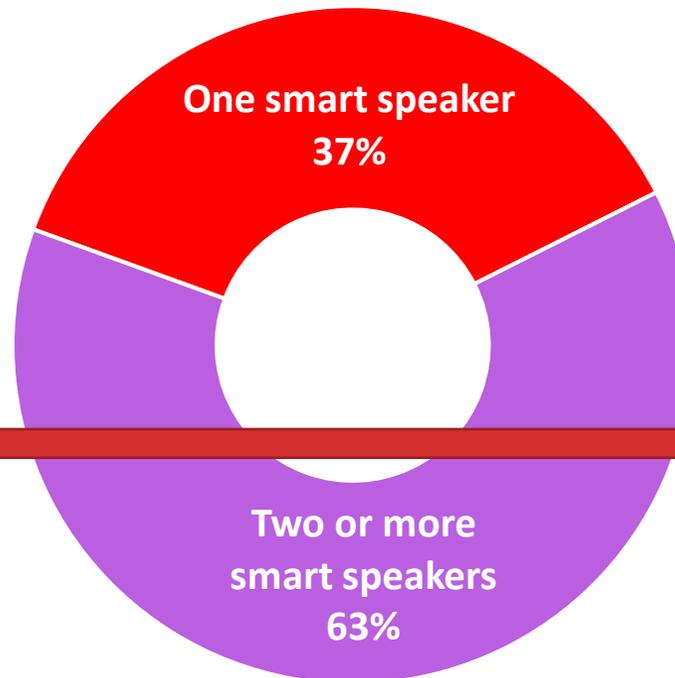
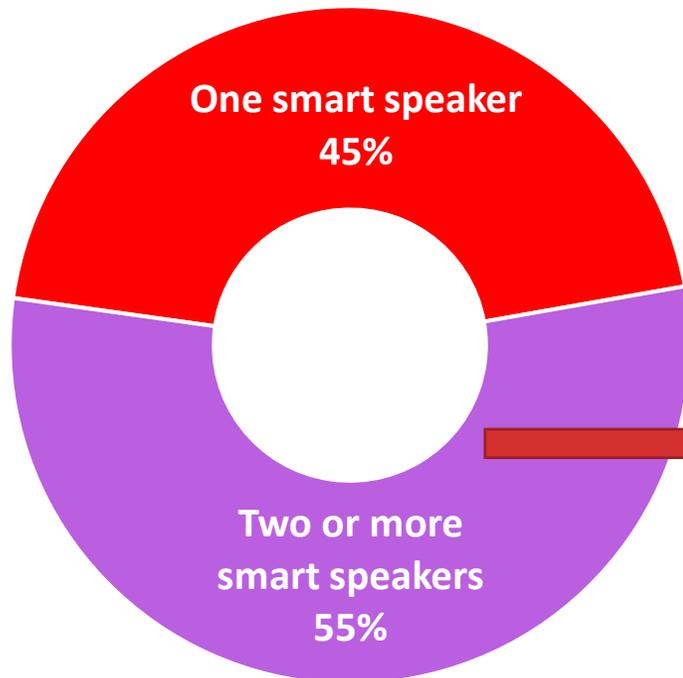
Nearly Two in Three Smart Speaker Owners Now Have Two or More of These Voice-Controlled Devices

% of Smart Speaker Owners Who Own...

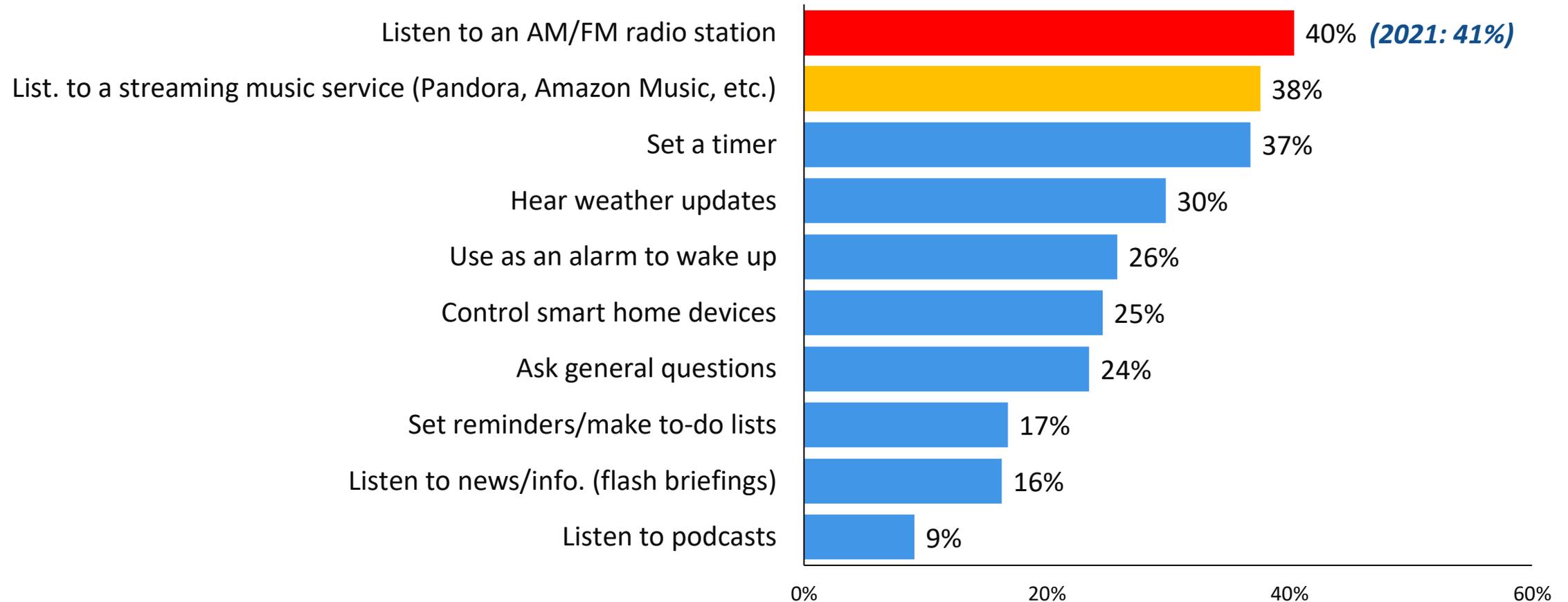
PRTS 2020

PRTS 2021

PRTS 2022

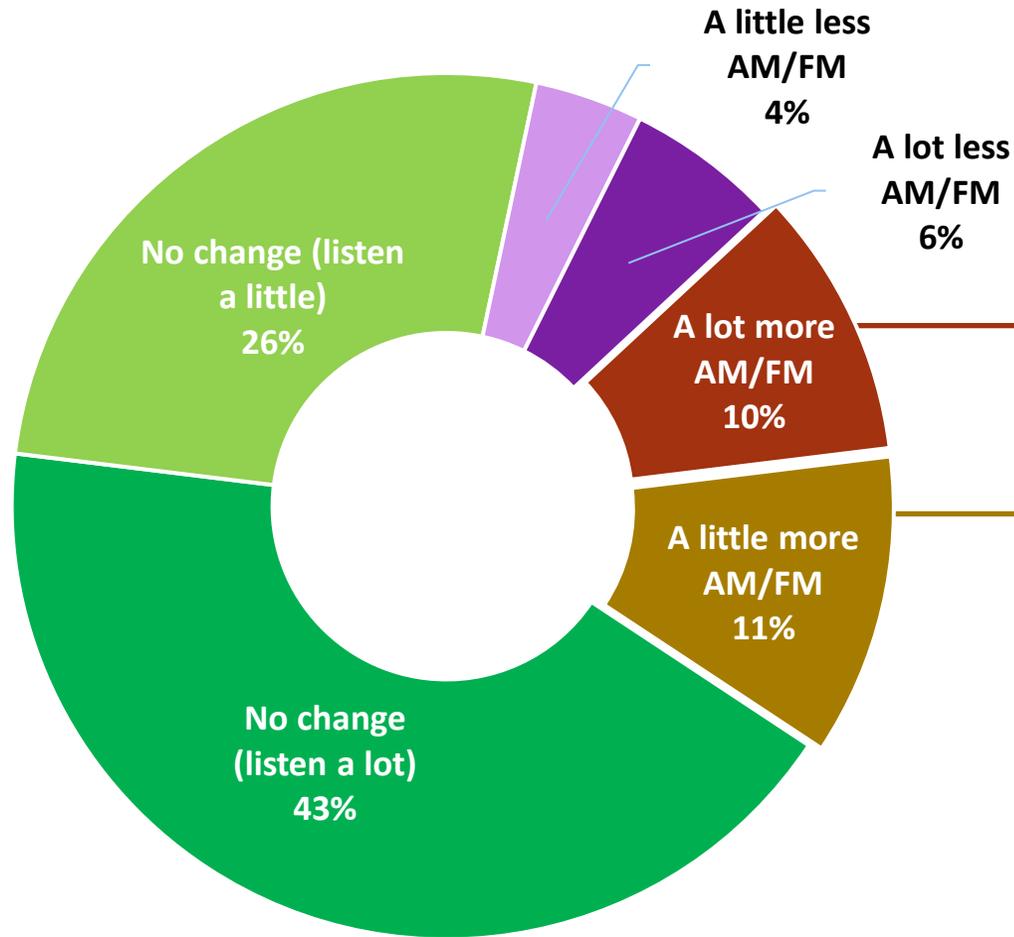


Listening to AM/FM Radio Stations Is the Top “Use Case” for Smart Speakers, a Huge Opportunity for Public Radio

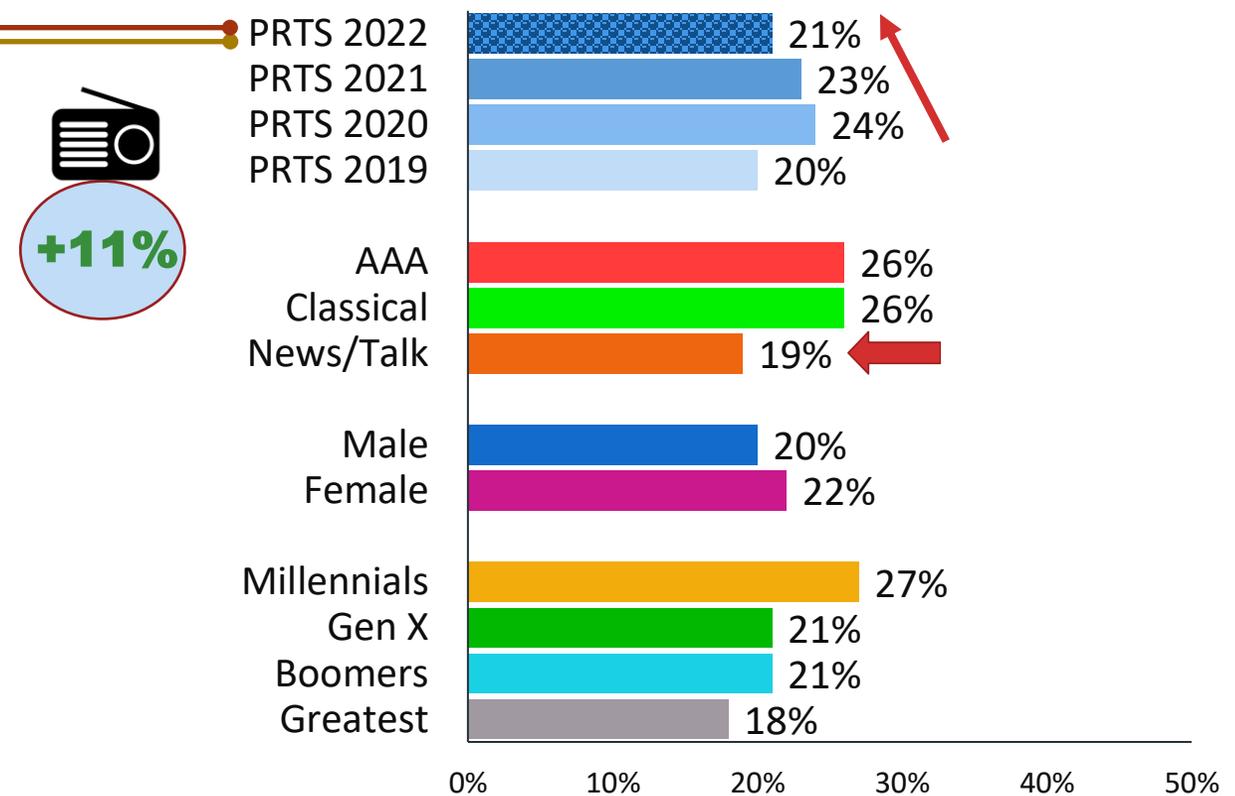


% of smart speaker owners who “frequently” use their device(s)
in each way (most mentioned uses; 9% or more)

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



% of Smart Speaker Owners Spending More Time (A Lot + A Little) With AM/FM Radio Since Getting the Device

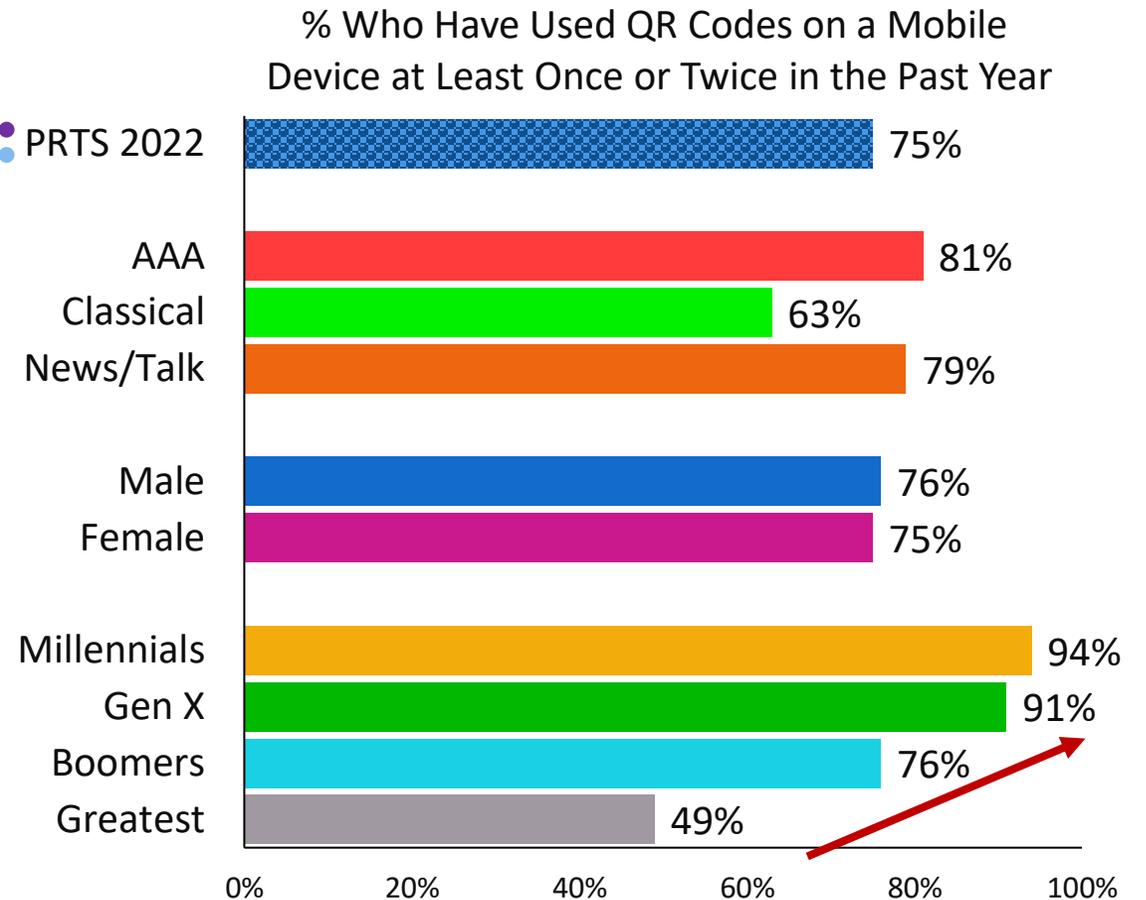
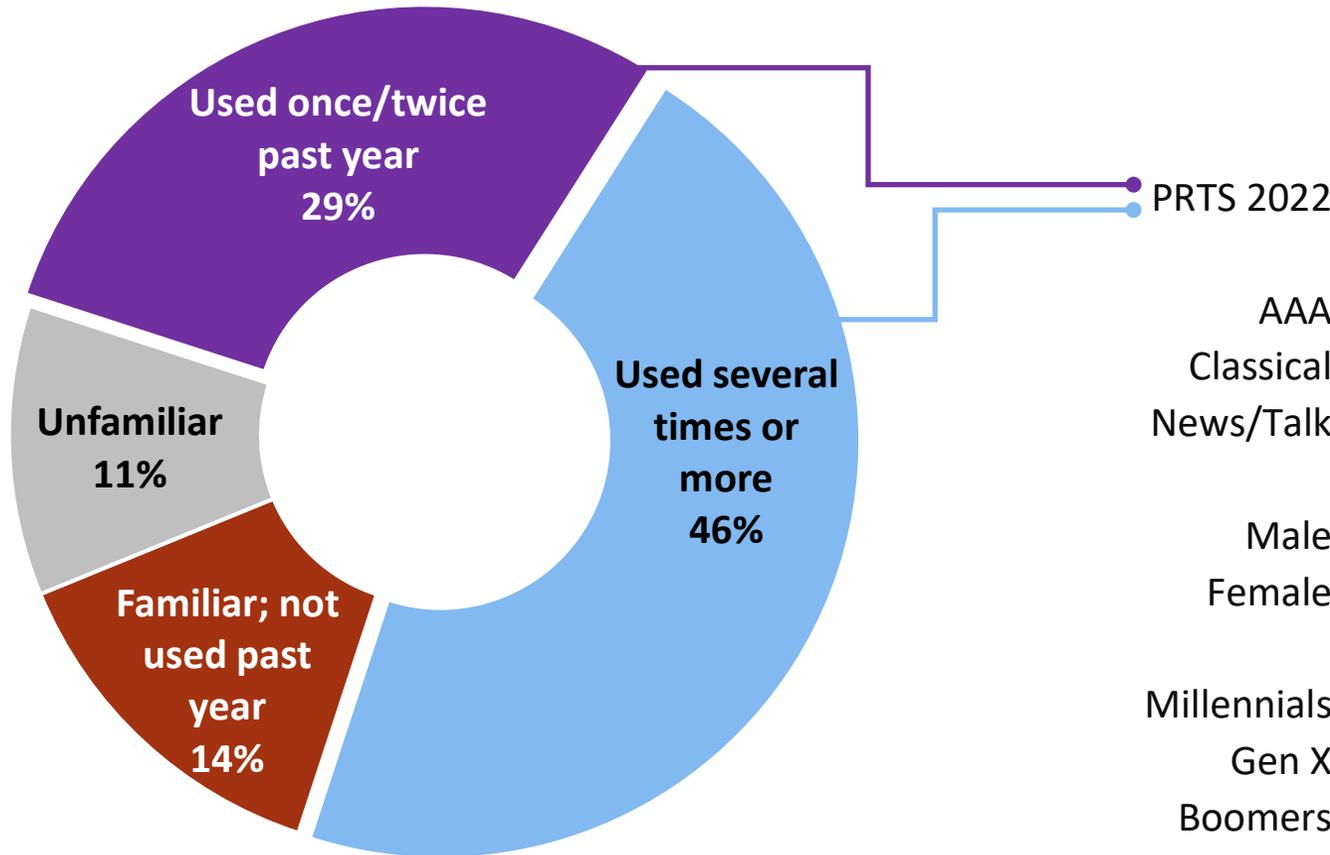


“How has your listening to AM/FM radio stations changed overall since you got a smart speaker?”



**The vast majority
use QR codes –
an avenue for
Public Radio
content and
donations?**

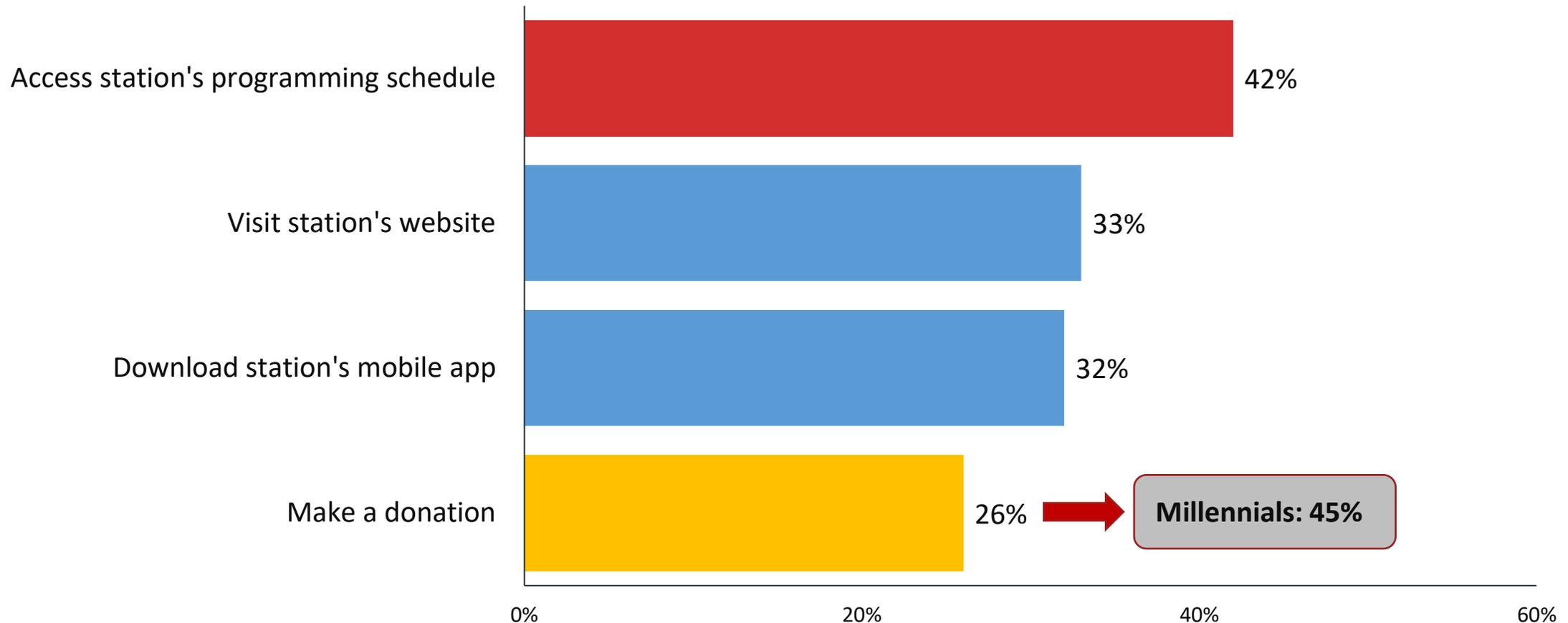
Three in Four Use QR Codes on a Mobile Device, Particularly Younger Generations



"In the past year, have you used a QR code on a mobile device?"

One in Four Is Interested in Using QR Codes to Donate to Their Favorite Public Radio Station – Especially Millennials

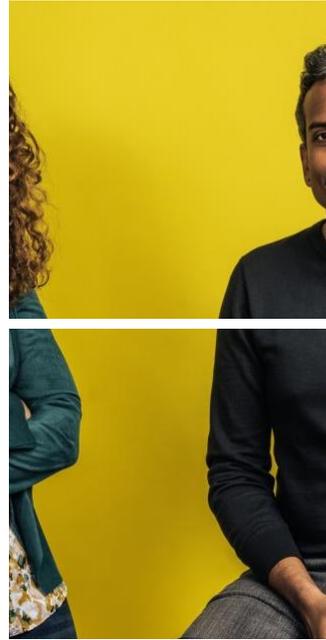
% “Very” or “Somewhat” Interested in Using QR Codes From P1 Station to:



Among those who have used QR codes at least once or twice in the past year

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PUBLIC RADIO
TECHSURVEY
2022 JACOBS MEDIA

The State of Public Radio in Post-Pandemic America

