

Jacobs  
media strategies

PRPD  
Content Conference  
2023



public radio  
techsurvey  
2023

# Public Radio in the AI Era





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# Public Radio Playbook

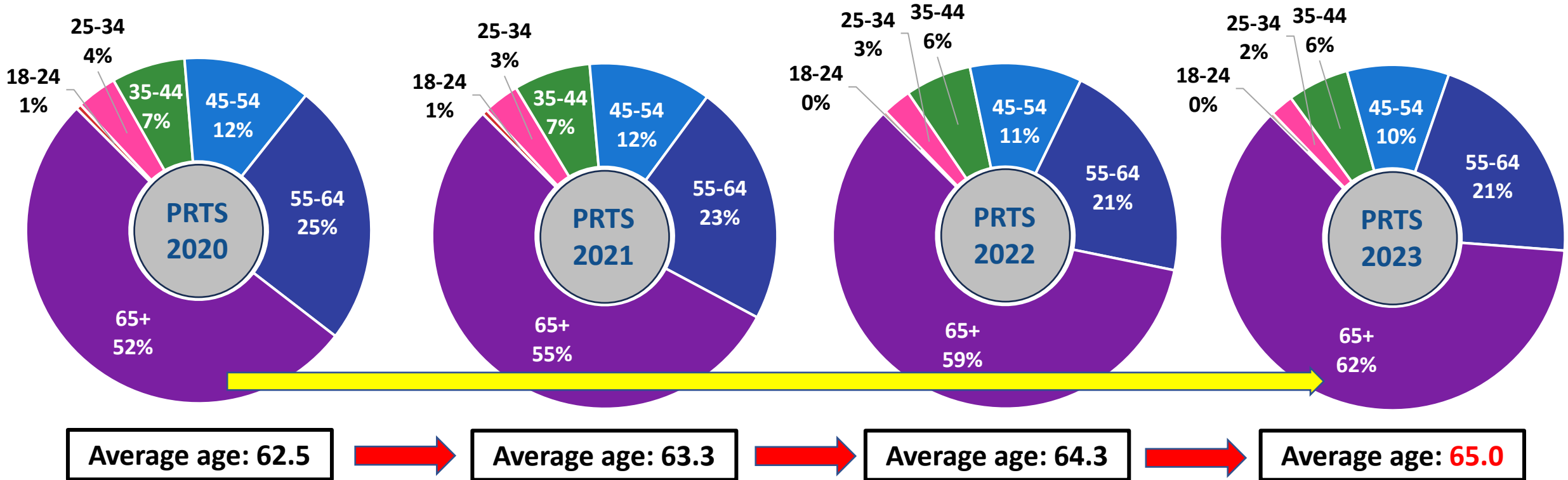
# Methodology

- 64 U.S. Public Radio stations
- N = 27,086
- Interview dates: June 6-July 9, 2023
- 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.

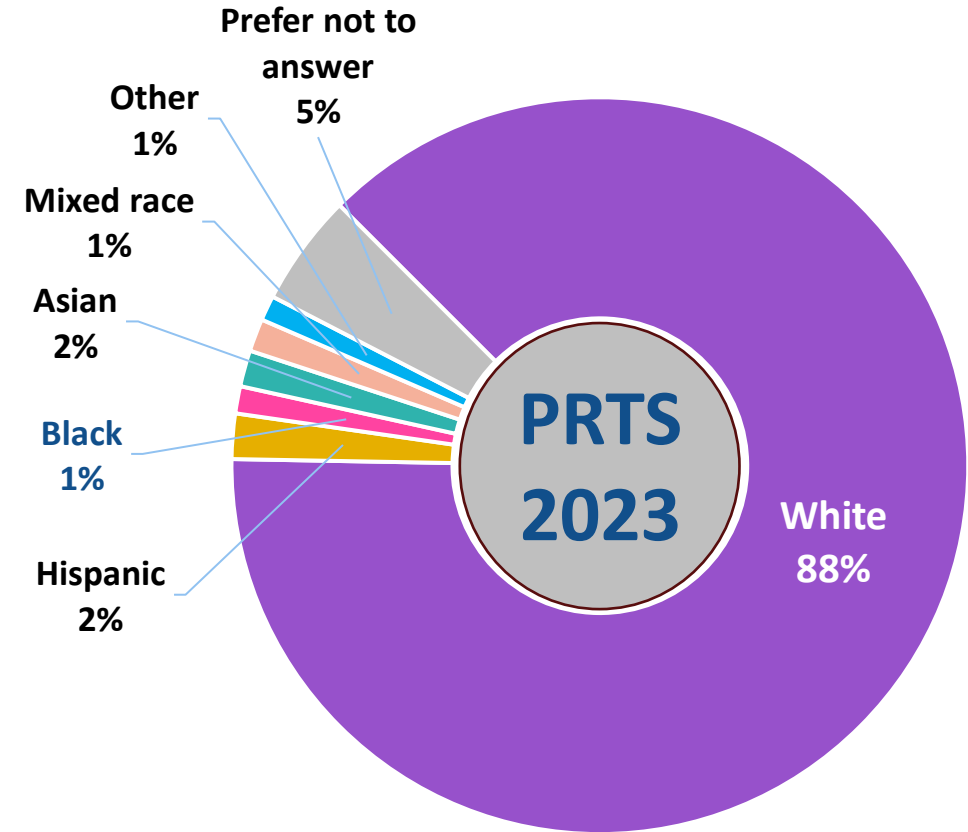
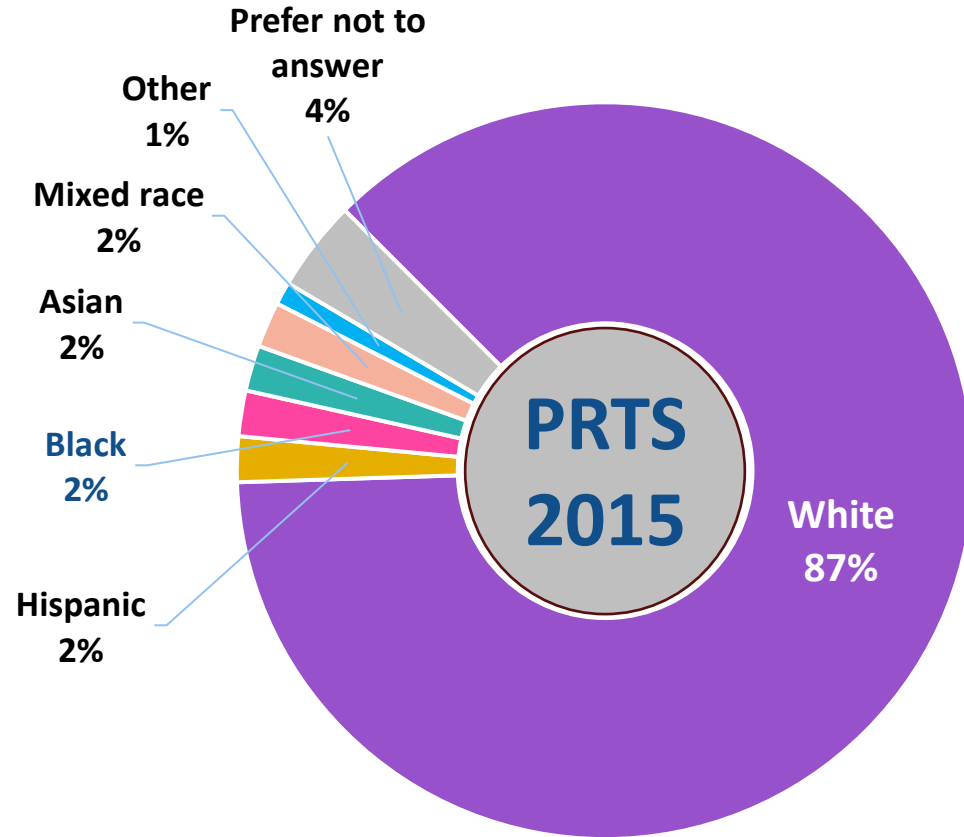


# The Sample (and the issue)

# PRTS (and Public Radio) Continue to Age



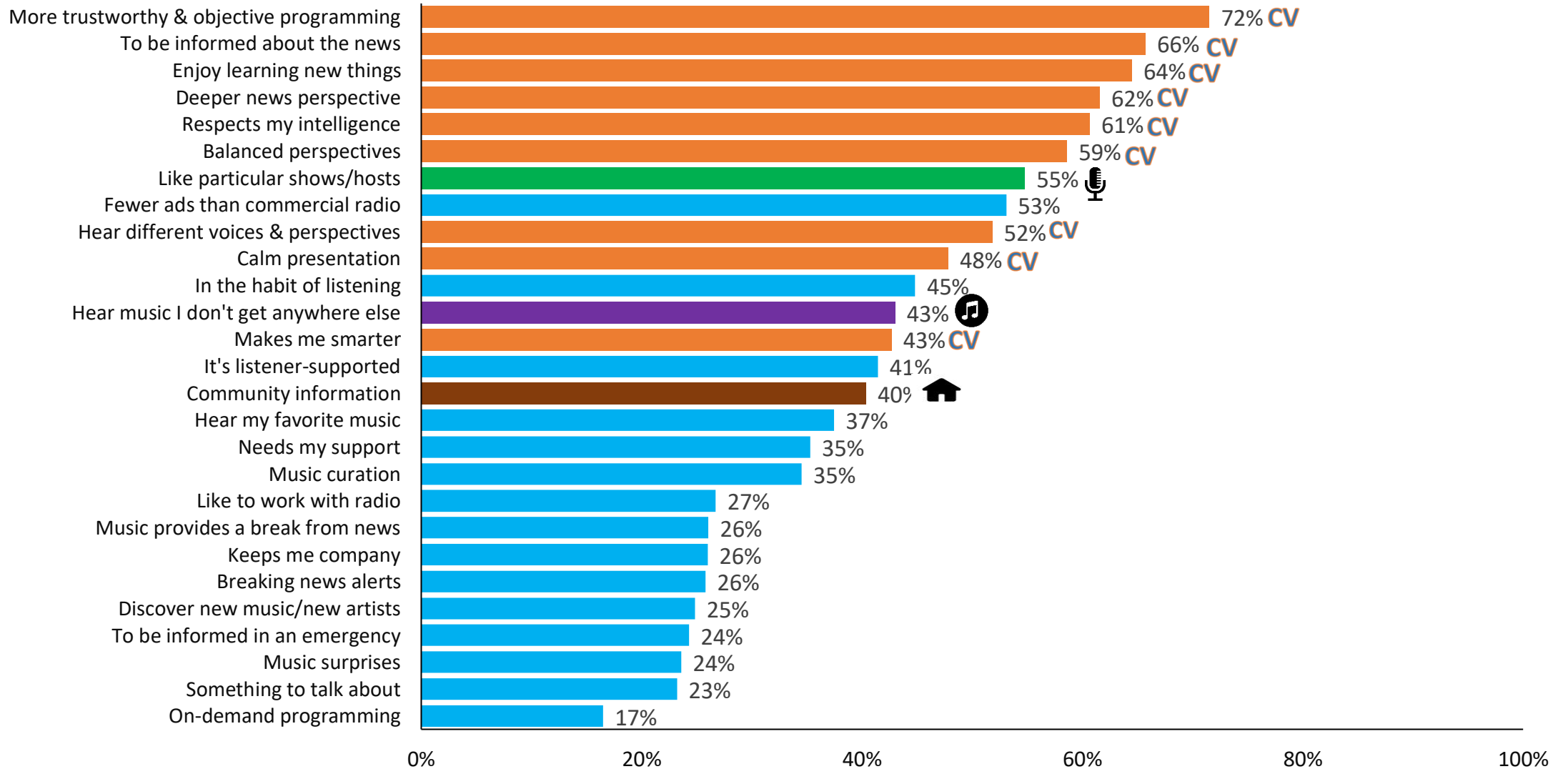
# Ethnicity





**The “vital signs” for Public Radio are down in several places, flat-lining in others. Lower Net Promoter Scores are lackluster, too.**

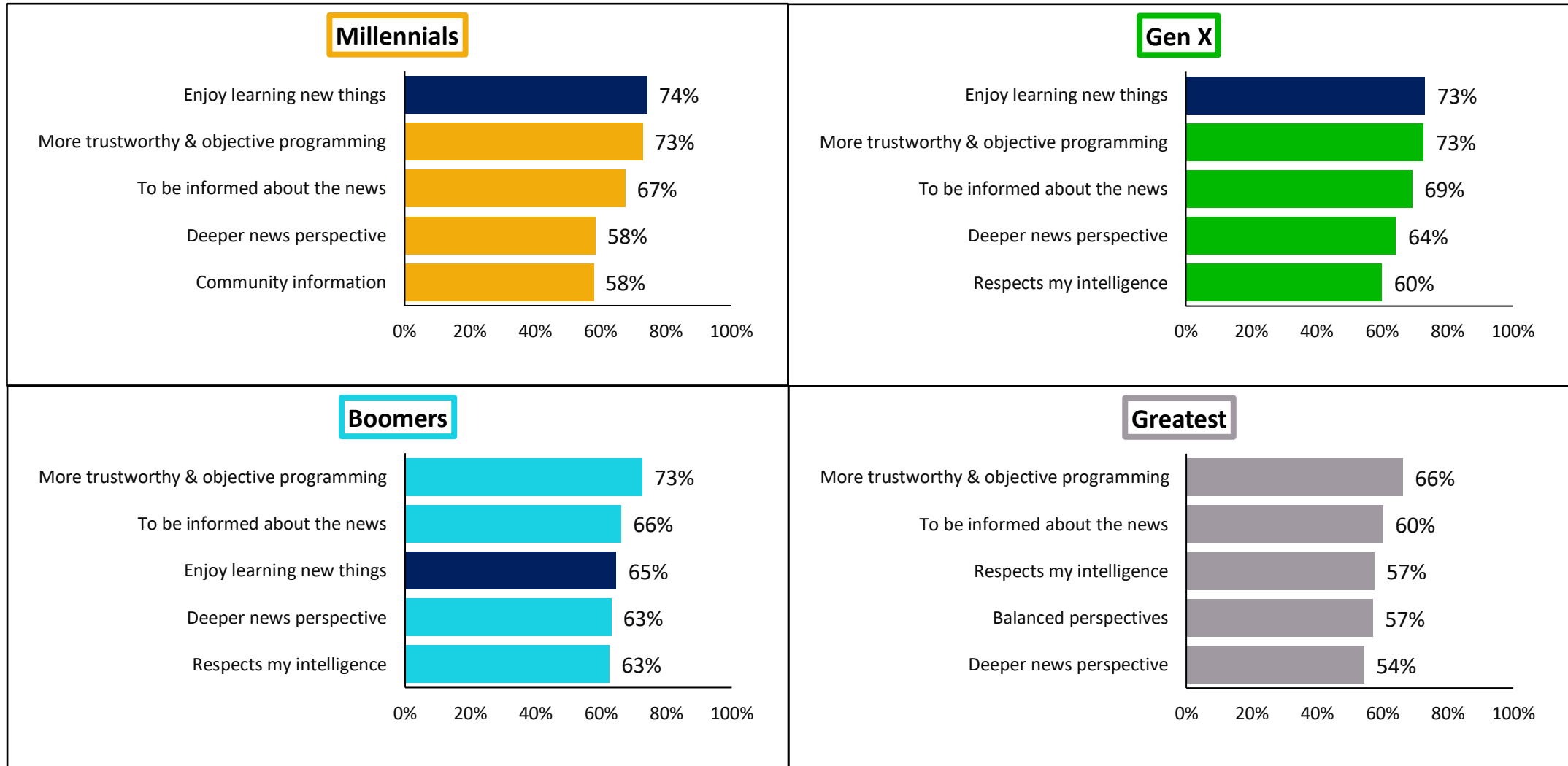
# Why Public Radio?



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

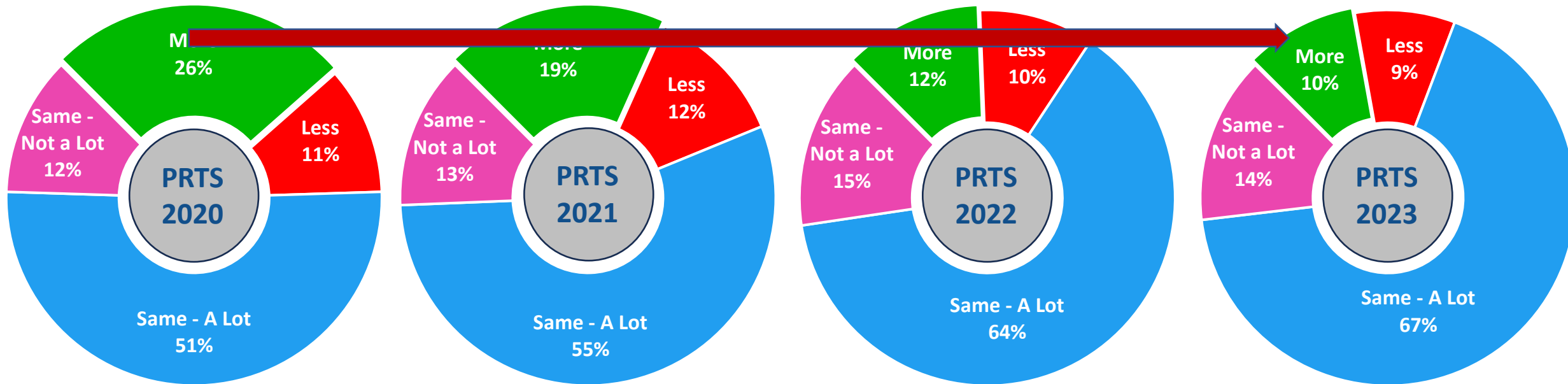


# Why Public Radio? Generations



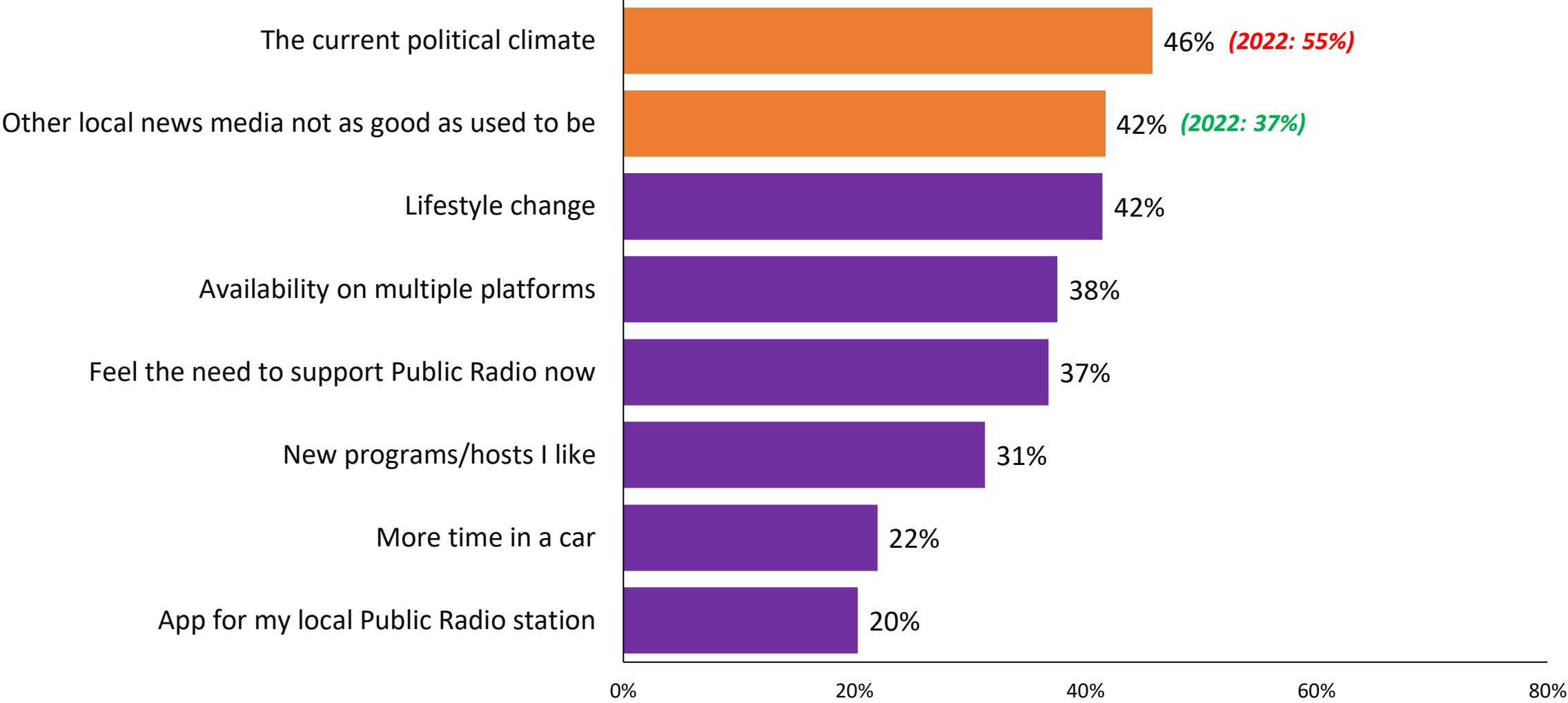
Among those who listen to AM/FM radio, % (by generation) who say this is a main reason they listen to Public Radio

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



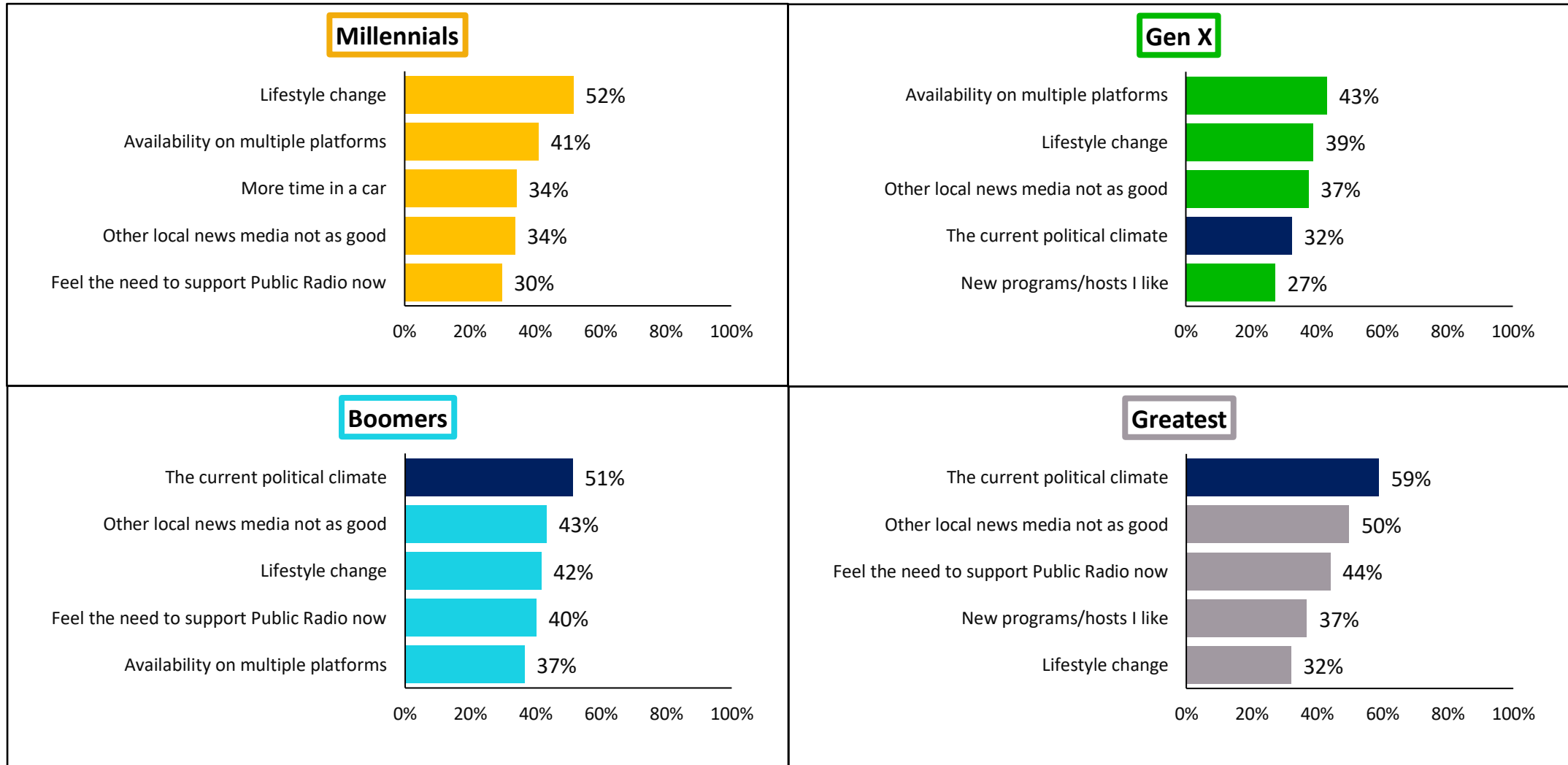
Among those who listen to AM/FM radio

# Main Reasons For Listening to Public Radio More



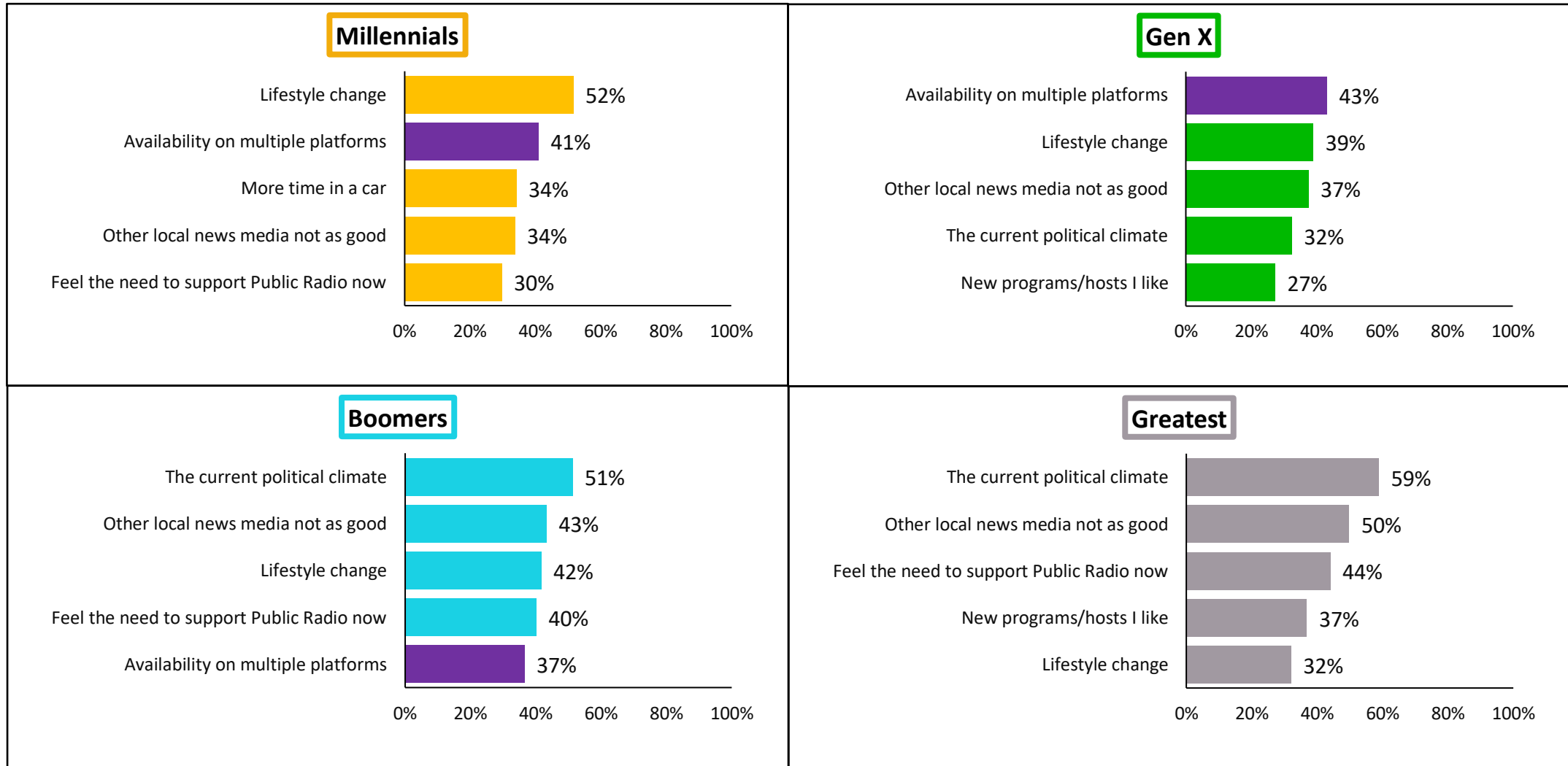
Among the 10% who say they are listening to Public Radio more in the past year, % who say this is a main reason they listen more

# Politics Is Driving Momentum For Older Generations



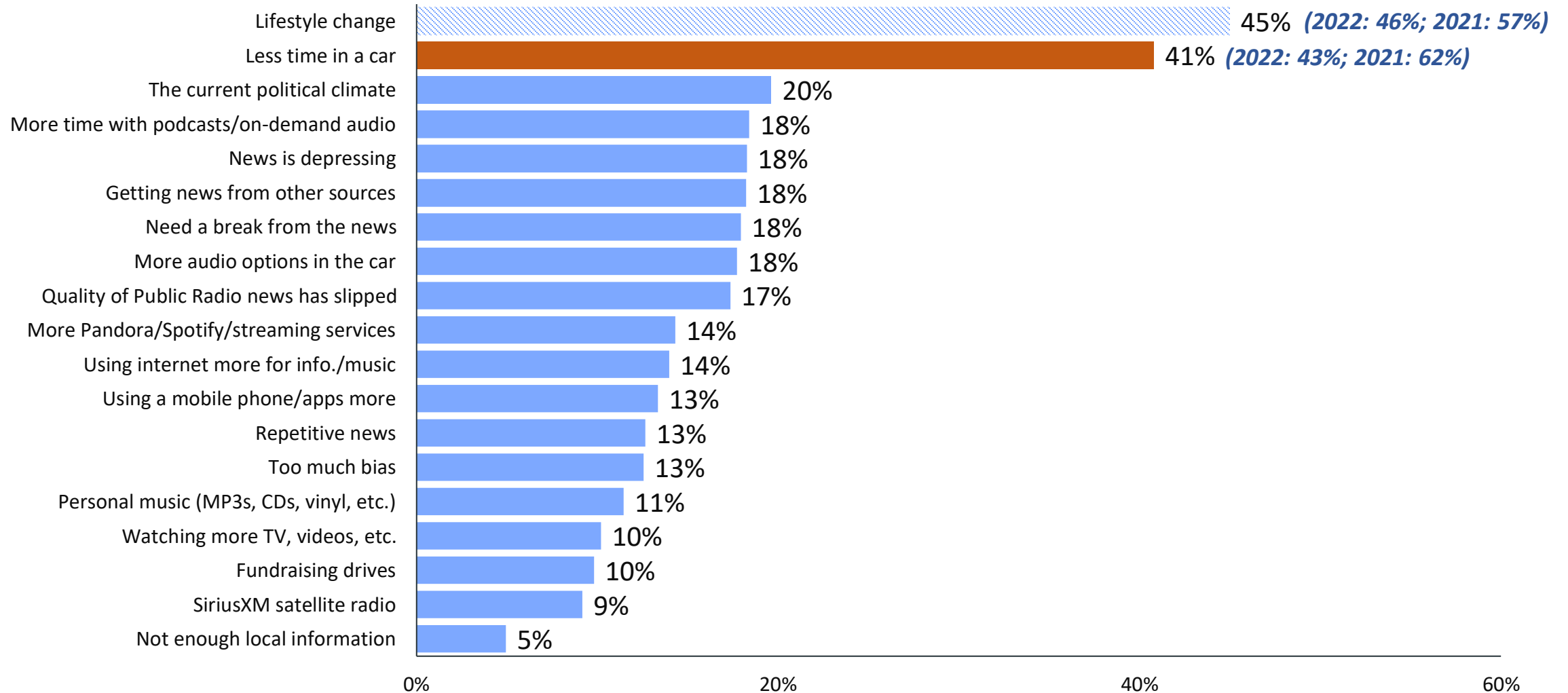
Among those who say they are listening to Public Radio more in the past year, % who say this is a main reason they listen more (Top 5 Reasons)

# Multi-Platform Delivery Resonates Most With Gens X and Y



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)

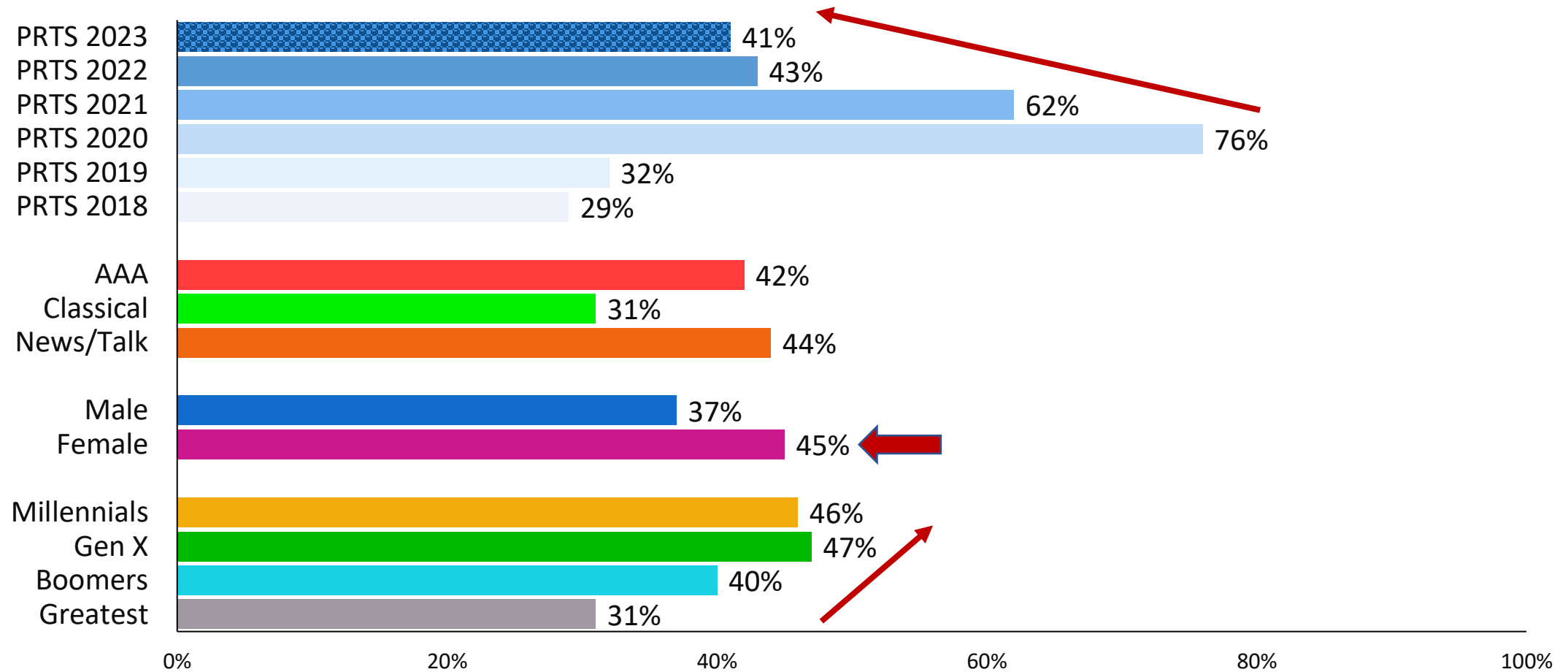
# Main Reasons For Listening to Public Radio Less



Among the 9% who say they are listening to Public Radio less in the past year,  
% who say this is a main reason they listen less

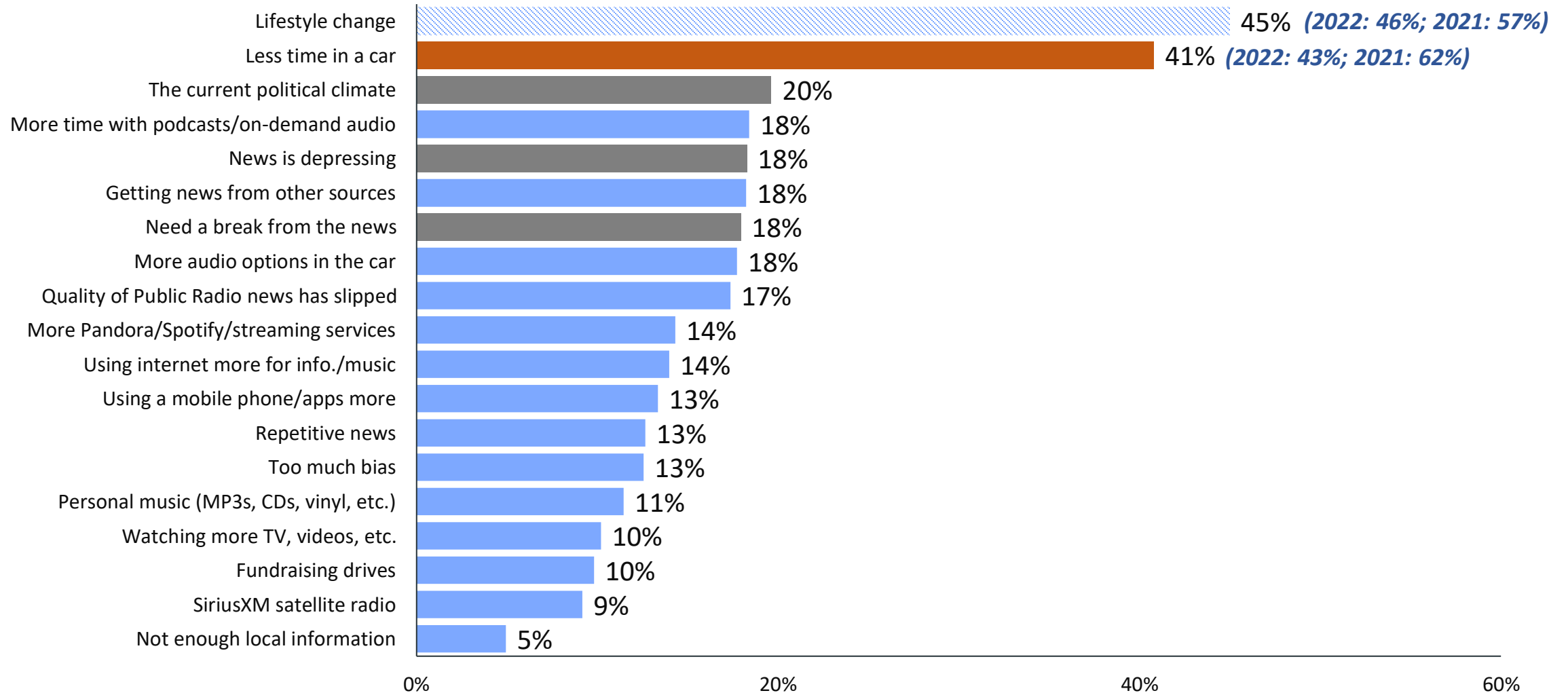
# Spending Less Time in a Car as a Reason to Listen Less Is *Not* Back to Pre-Pandemic Levels

*“Spending Less Time in a Car”*



Among the 9% who say they are listening to Public Radio less in the past year, % who say this is a main reason they listen less

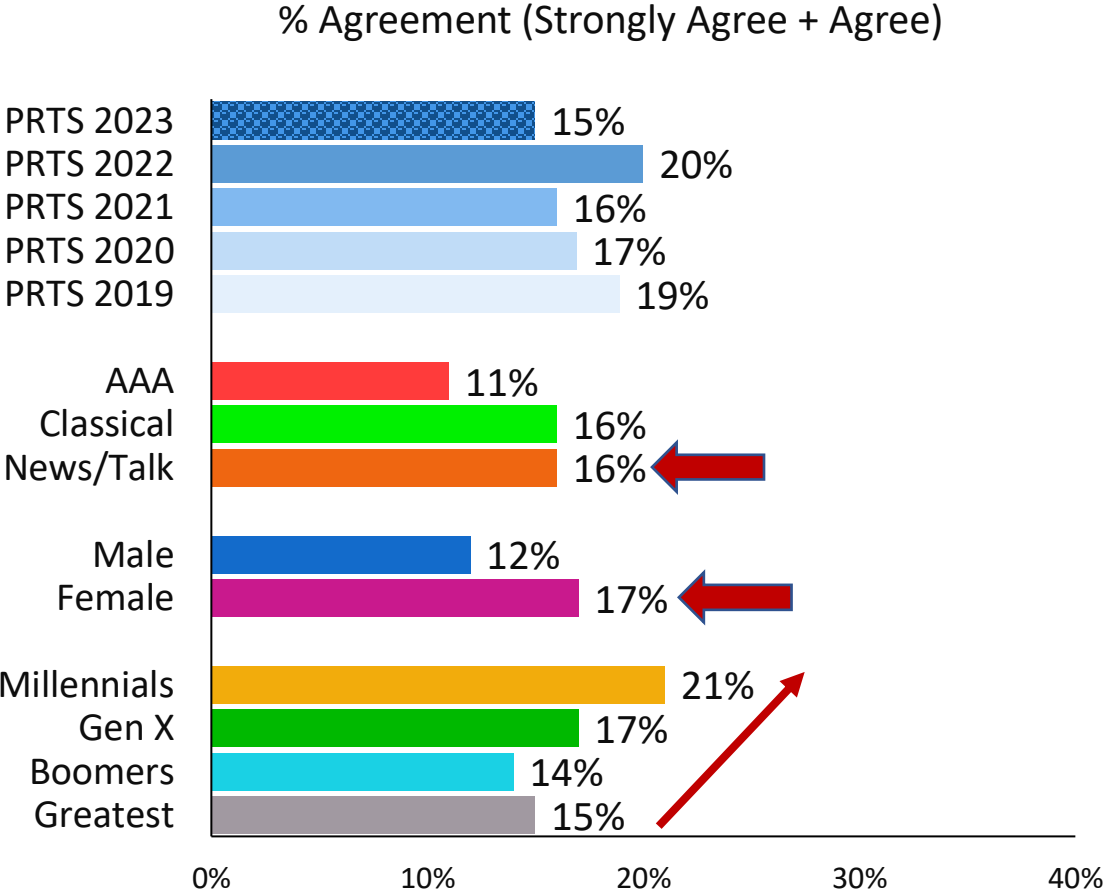
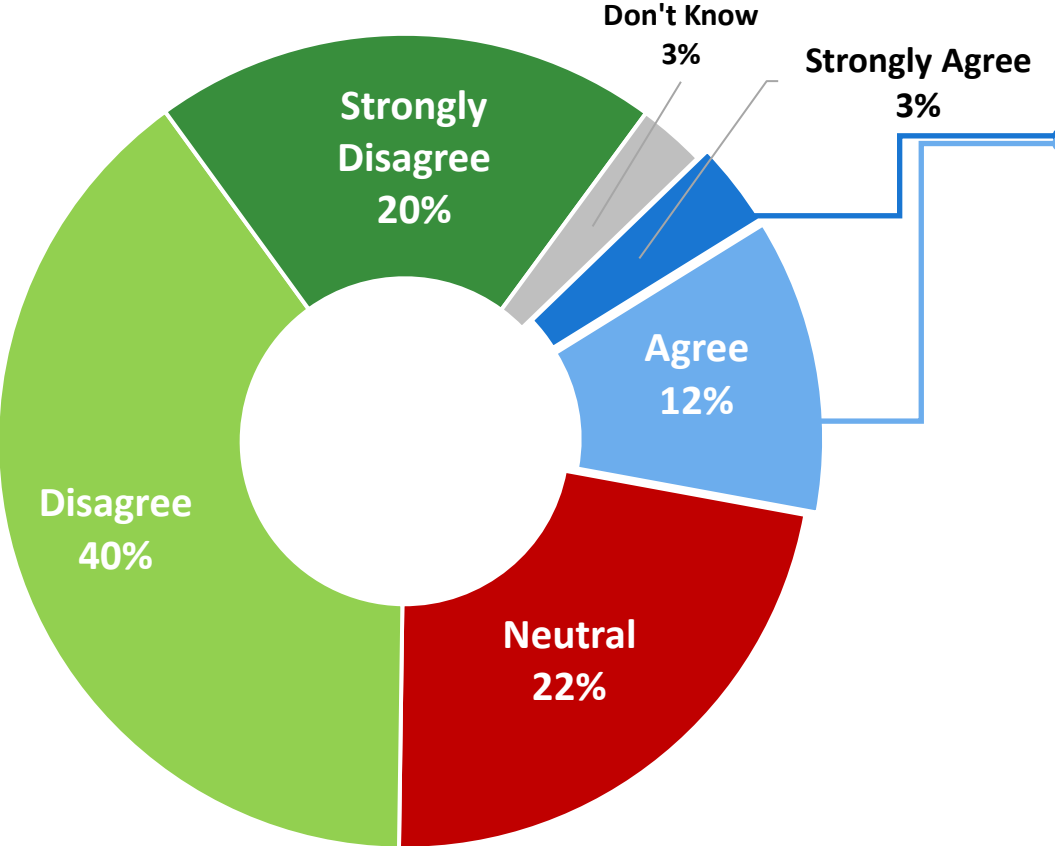
# Main Reasons For Listening to Public Radio Less



Among the 9% who say they are listening to Public Radio less in the past year,  
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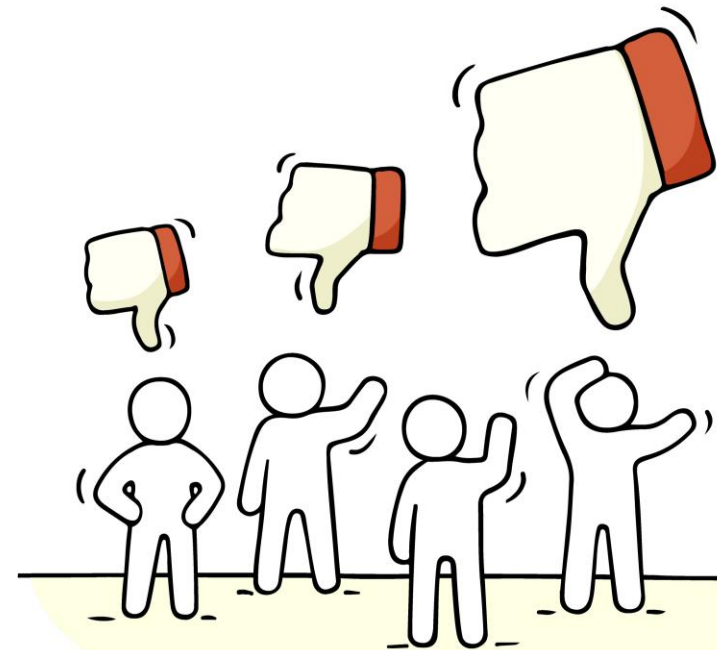


# Needing a Break From the News Peaked in the 2022 Election Year

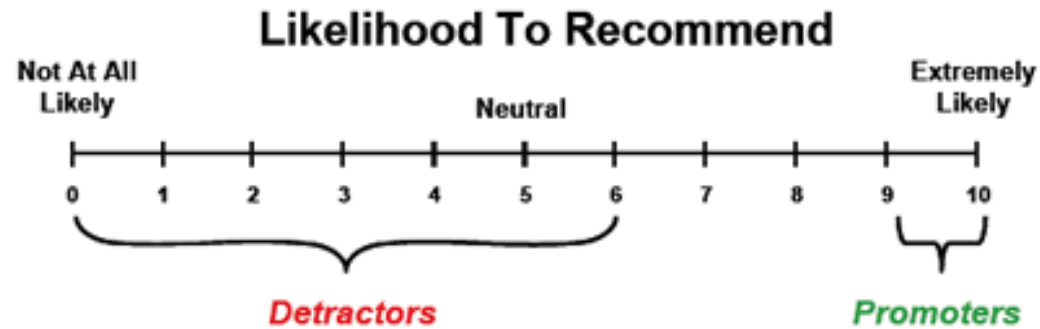


*"I find myself spending less time with Public Radio because I increasingly need a break from the news"*

**Lower NPS scores  
raise questions  
about Public  
Radio's "brand  
health."**

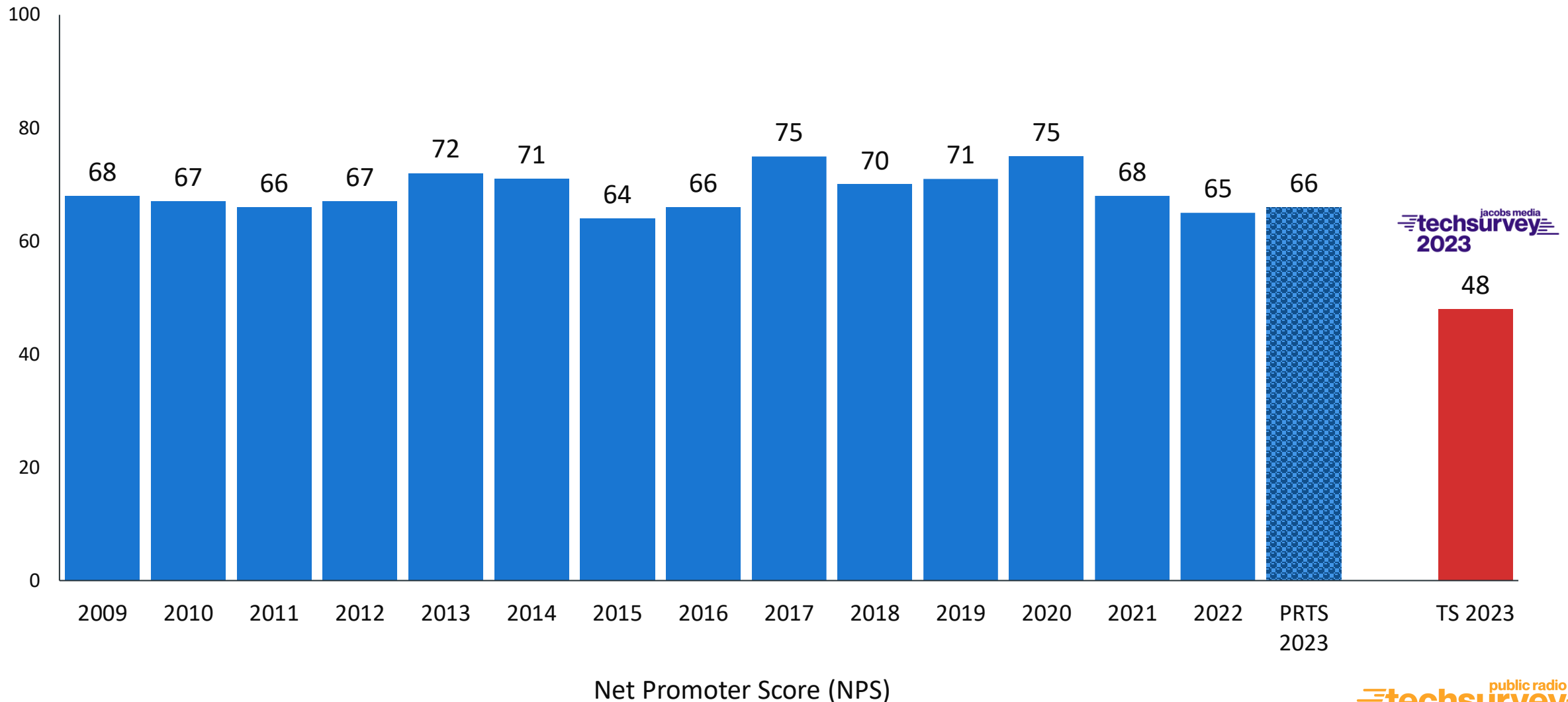


# NET PROMOTER

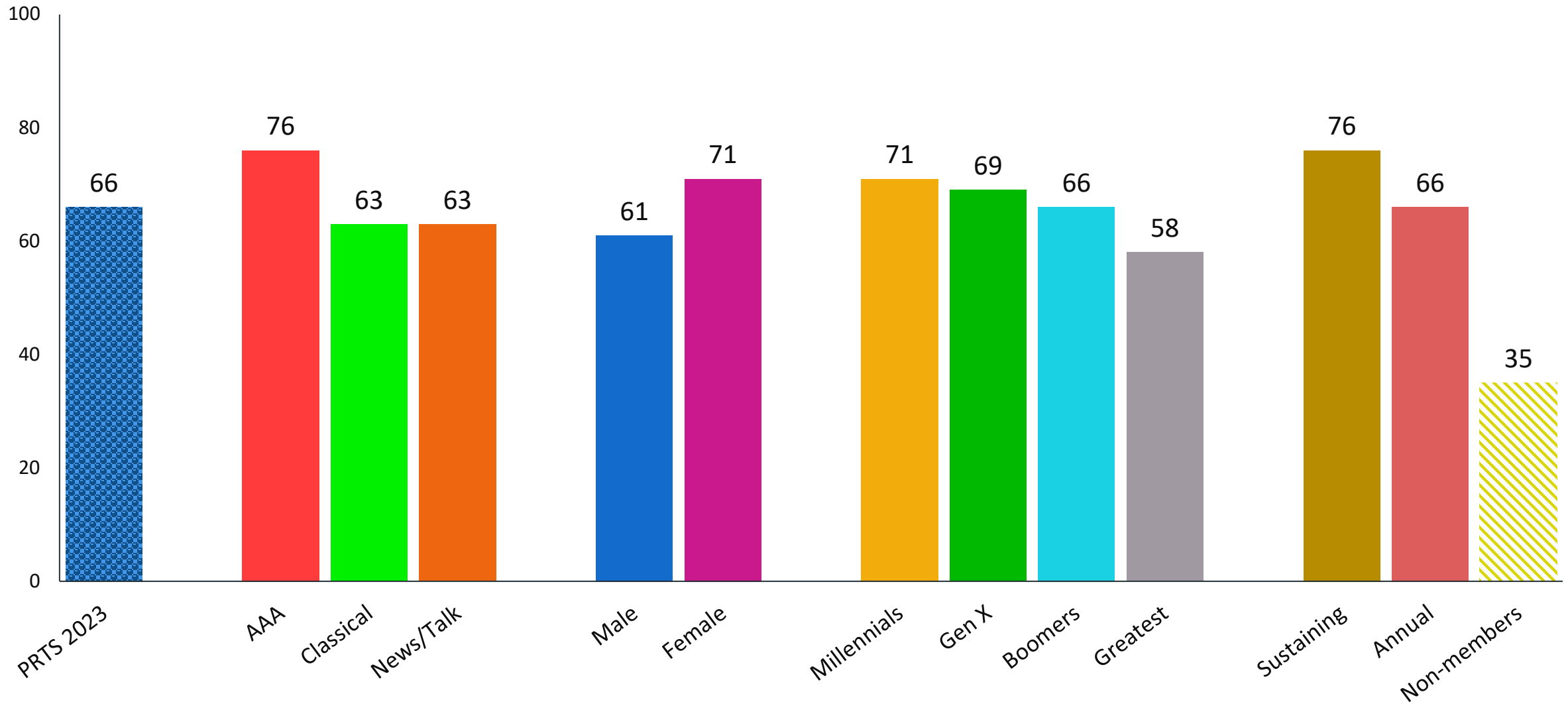


$$\% \text{ Promoters} - \% \text{ Detractors} = \text{Net Promoter Score}$$

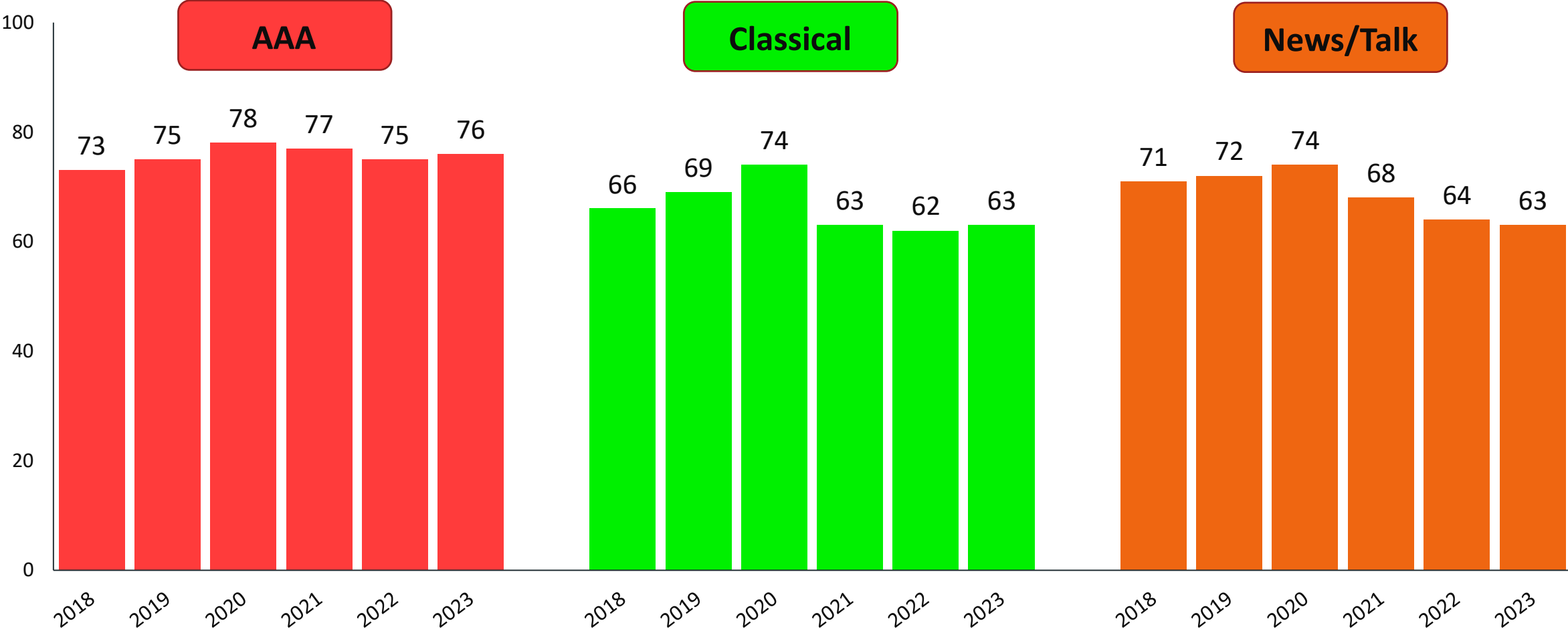
# Public Radio's Net Promoter Score Stabilizes, But Remains Well Below Recent Highs



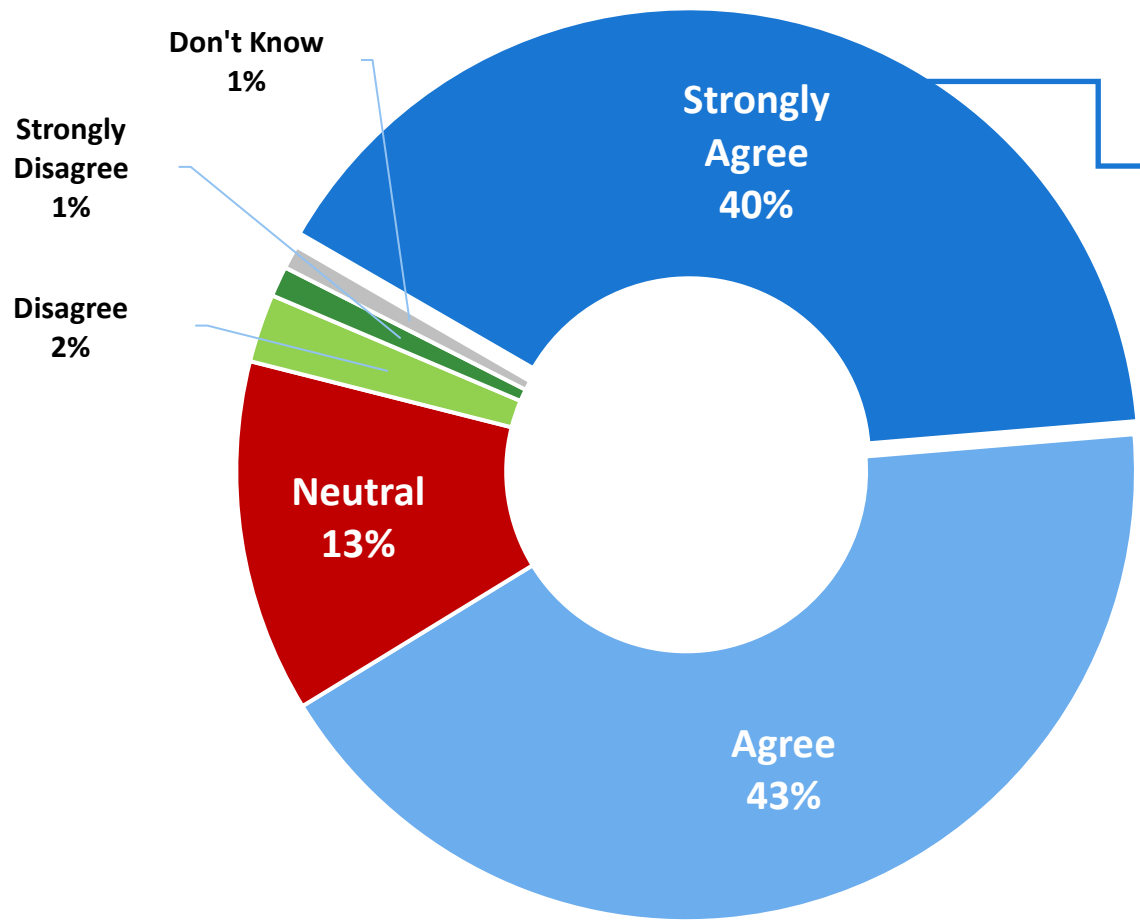
# NPS Is Strongest among Triple A Fans, Women, and Sustainers



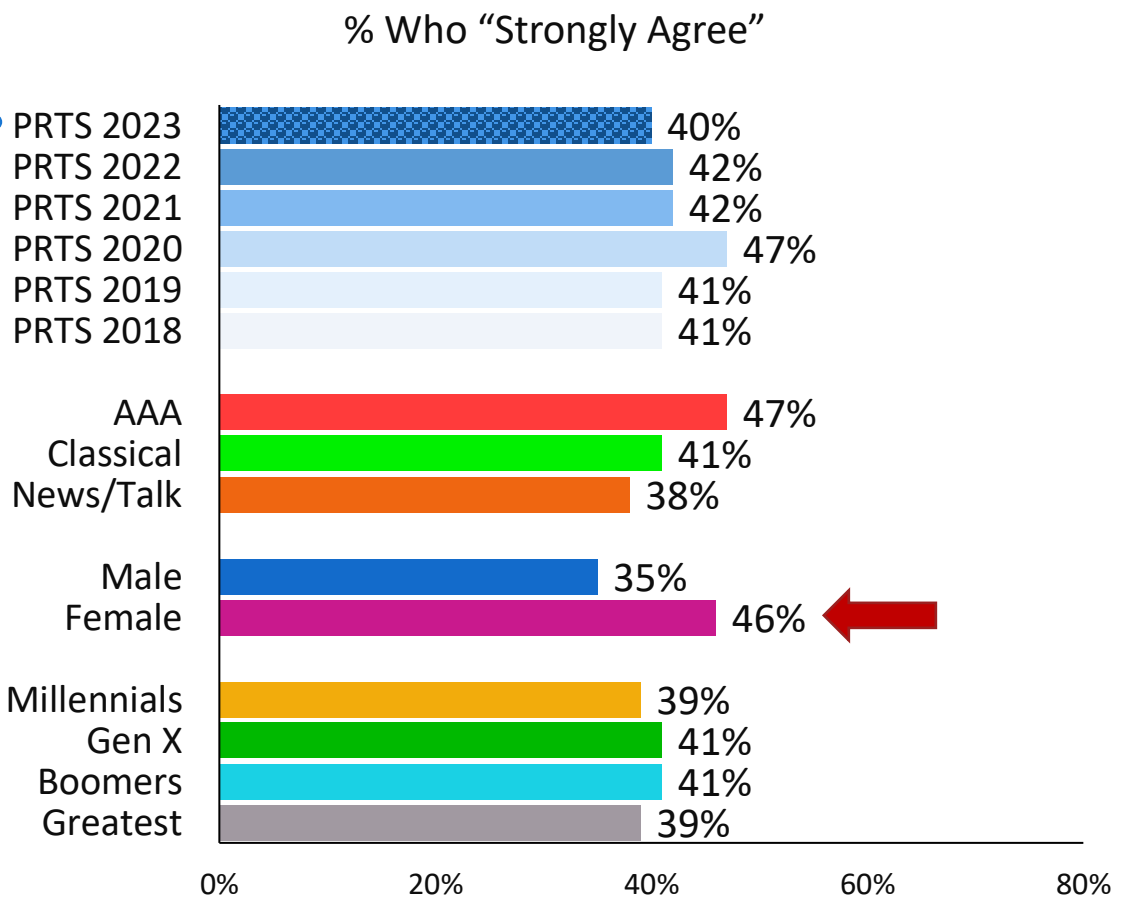
# Triple A NPS Scores Are Solid, While Classical and News/Talk Are “Off” Their Pre-Pandemic Highs



# A Sense of Connection Is Flagging, Best Among Women and AAA Fans



*"I really feel a sense of connection to THE STATION THAT SENT ME THIS SURVEY"*





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# Public Radio Playbook



# Understand Where The Audience Is and How to Reach Them

2. Meet people where they are via the channels and platforms they already use.

Traditional linear content—whether delivered via terrestrial radio or live stream—is necessary but insufficient to reach community members who increasingly use on-demand digital products and platforms to be informed, educated, engaged, and entertained. What has historically been called public “radio” needs to be thought of as a portfolio of products and services that are relevant to the local community and can be accessible wherever and whenever people look for content.



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Playbook**

# Understand Where The Audience Is and How to Reach Them

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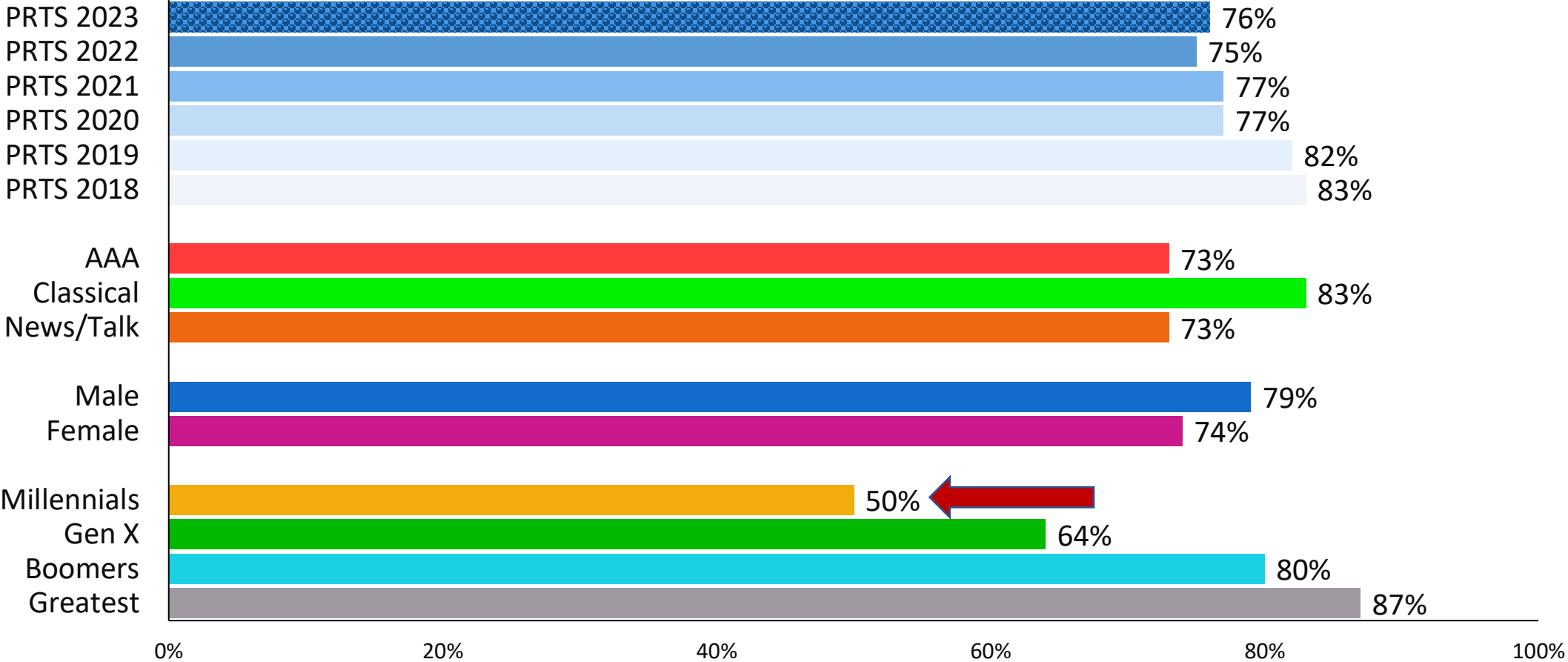
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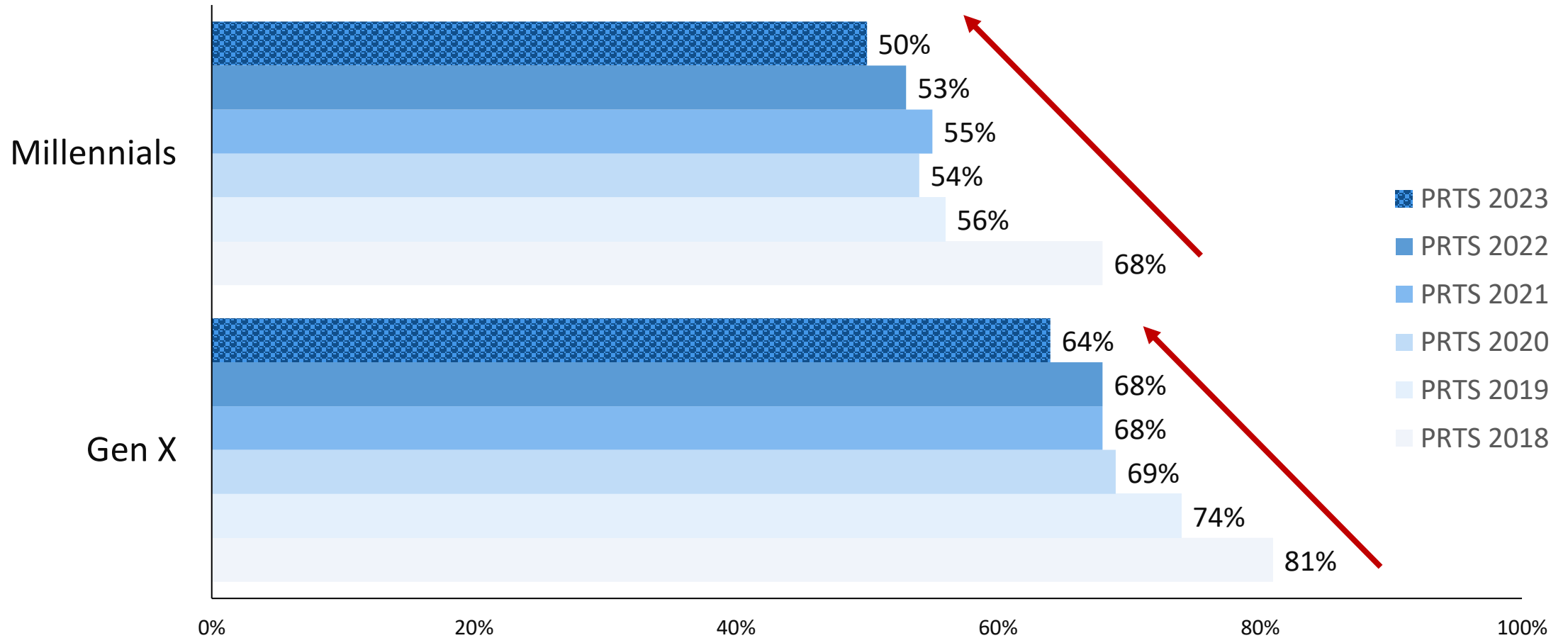
**Public Radio  
Playbook**

# Three in Four Have a Regular Radio Where They Live; Only Half of Millennials Now Own a Radio at Home



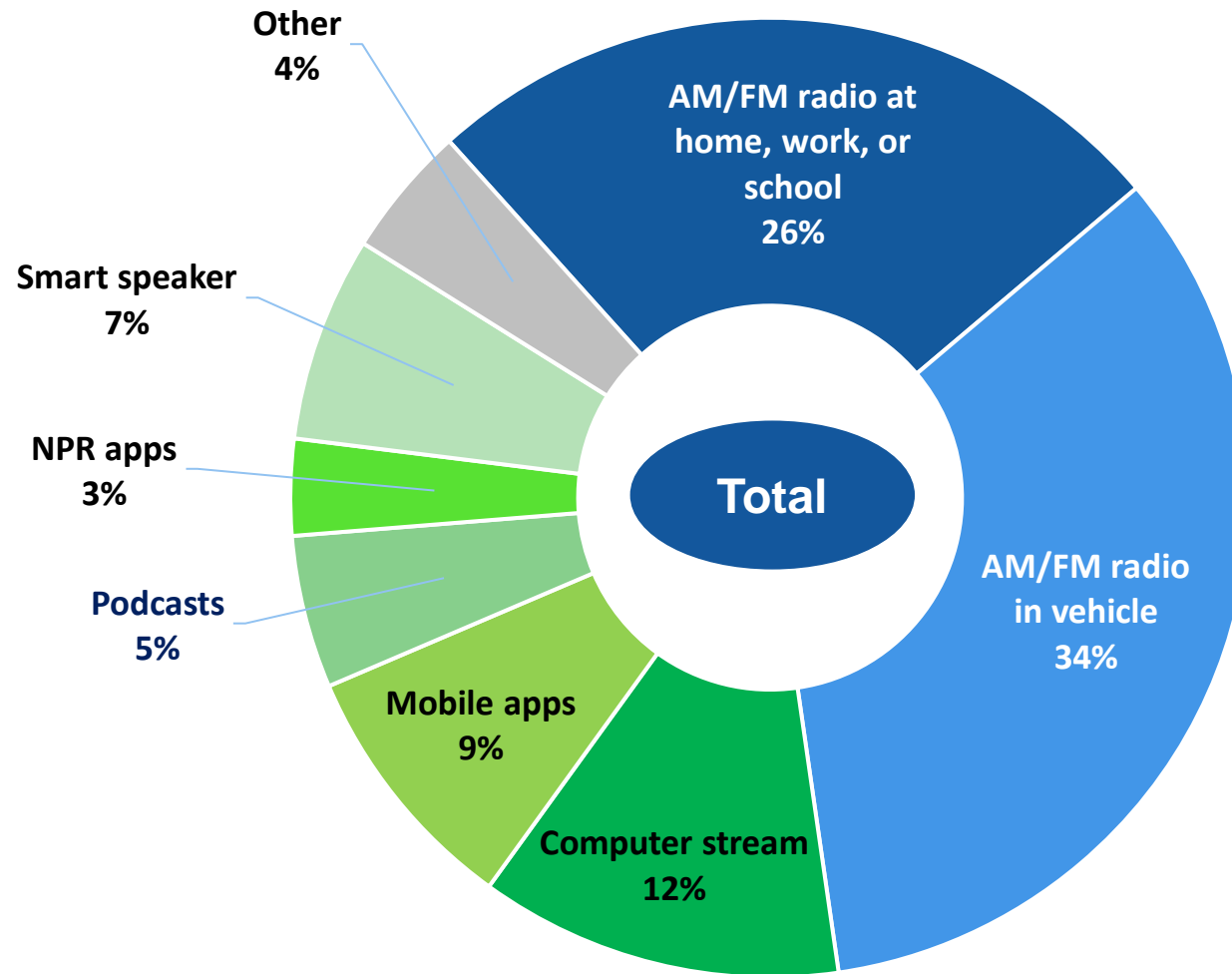
% with a regular radio in working condition where they live that they use

# Only Half of Millennials and Fewer Than Two In Three Gen Xers Now Own a Radio at Home



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

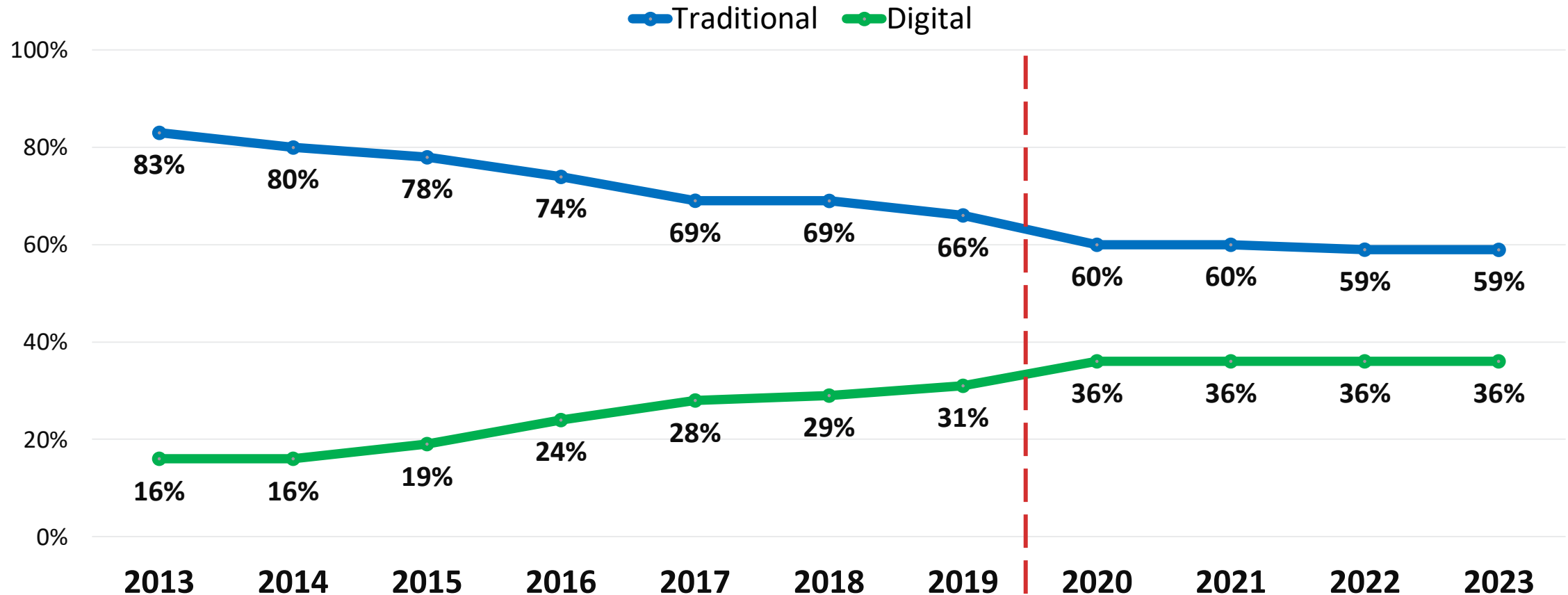
# How Do Public Radio Fans Listen to Their Favorite Stations?



Traditional – 59%  
Digital – 36%

PRTS 2022  
Traditional – 59%  
Digital – 36%

# P1 Station Listening Platforms: Traditional vs. Digital



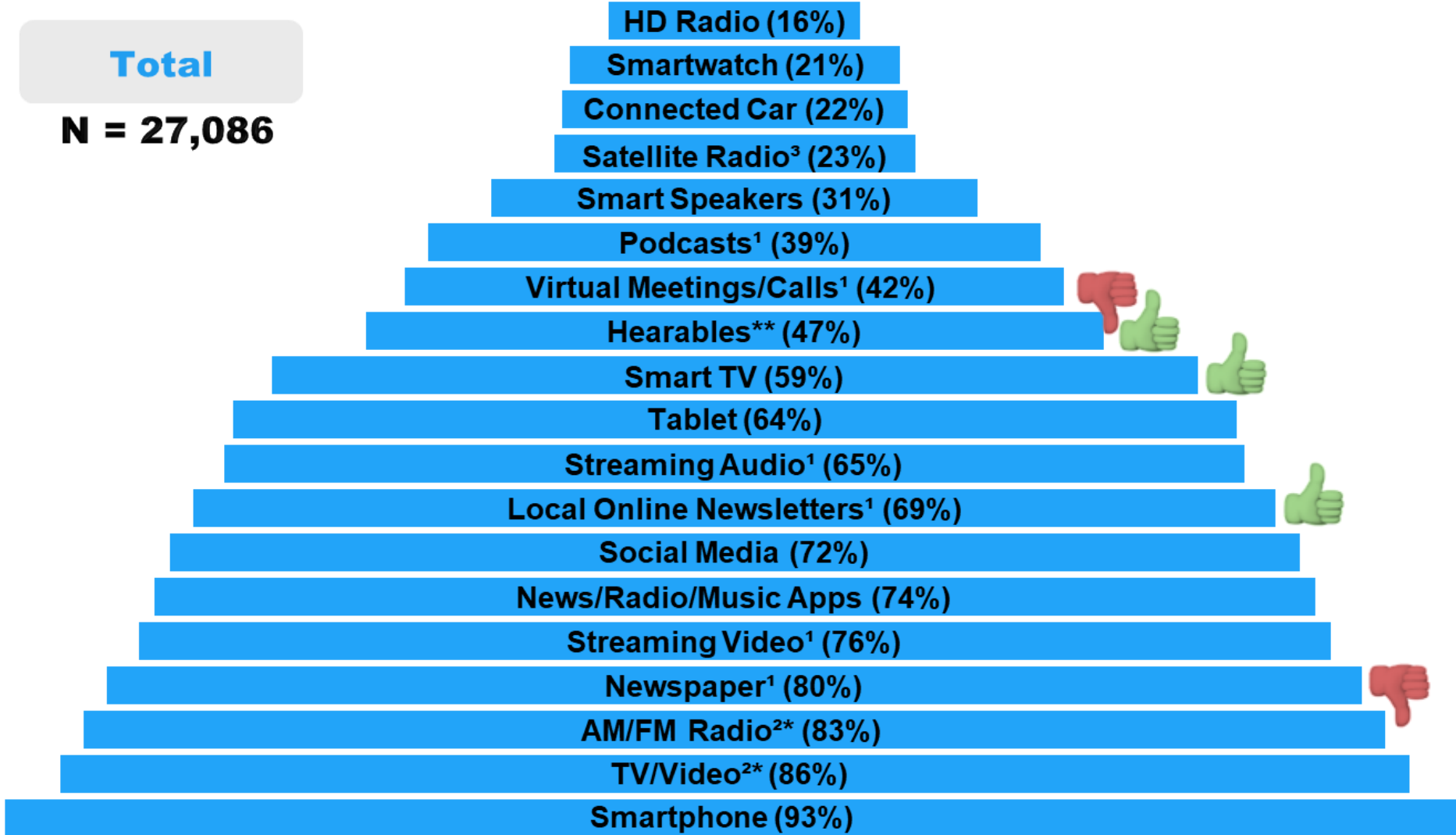
% of time spent with P1 station in a typical week via traditional platforms (an AM/FM radio at home/school/work or in a vehicle) vs. digital platforms (computer, mobile/NPR apps, podcasts, smart speaker)



# Media Pyramid 2023

**Total**

**N = 27,086**



Total PRTS 2022
14%
19%
21%
23%
29%
38%
47%
44%
56%
64%
65%
63%
72%
75%
76%
83%
82%
86%
93%

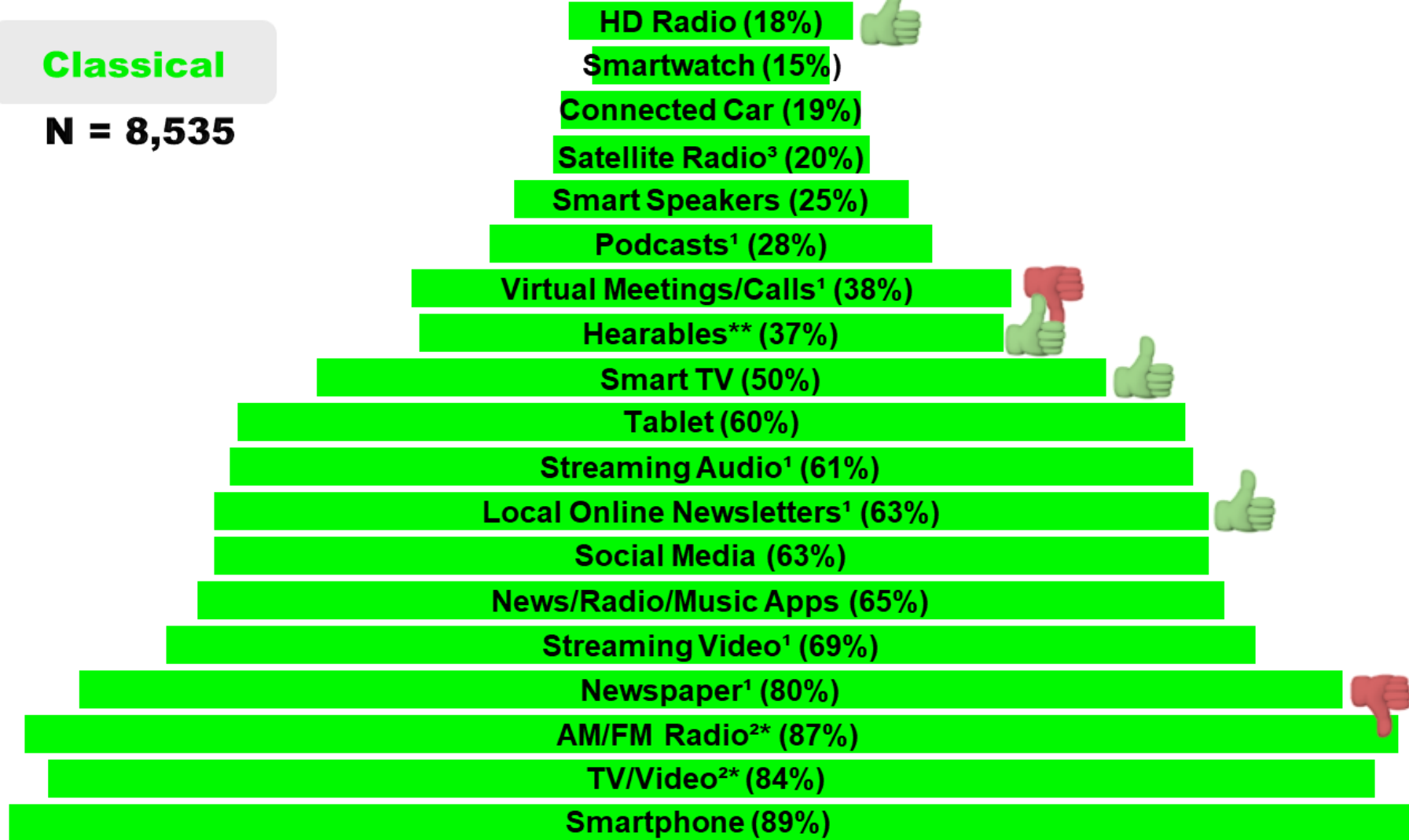
<sup>1</sup> Weekly or more <sup>2</sup> 1+ hour per day <sup>3</sup> Paid & trial users \*Any platform/device \*\*Wireless headphones/earbuds



# Media Pyramid 2023

**Classical**

**N = 8,535**



Classical  
PRTS 2022

15%

13%

17%

20%

23%

26%

42%

32%

45%

60%

63%

59%

61%

65%

69%

84%

87%

84%

87%

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

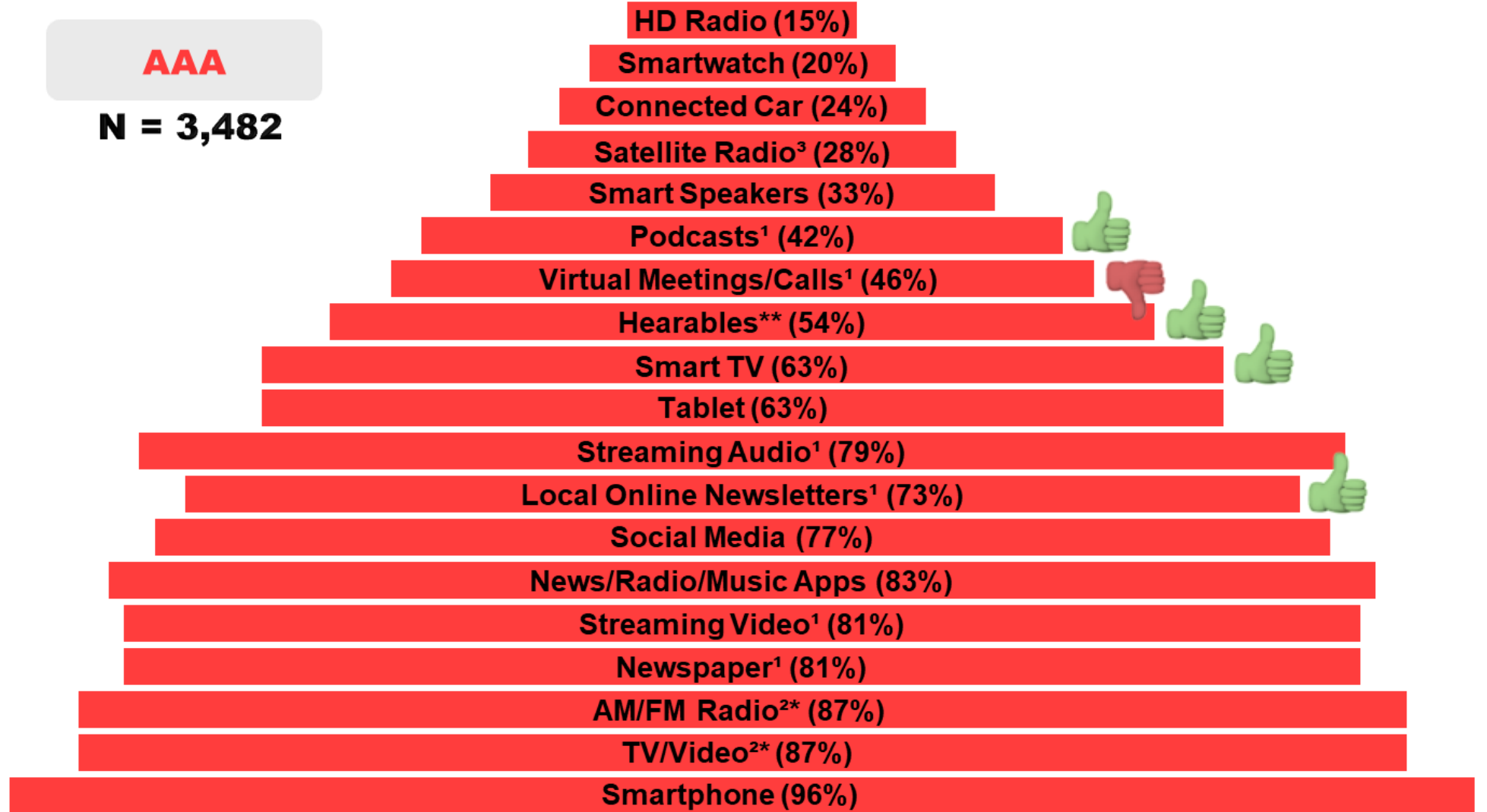




# Media Pyramid 2023

**AAA**

**N = 3,482**



**AAA  
PRTS 2022**

13%

18%

23%

28%

32%

37%

50%

50%

60%

63%

77%

65%

77%

82%

80%

83%

88%

87%

95%

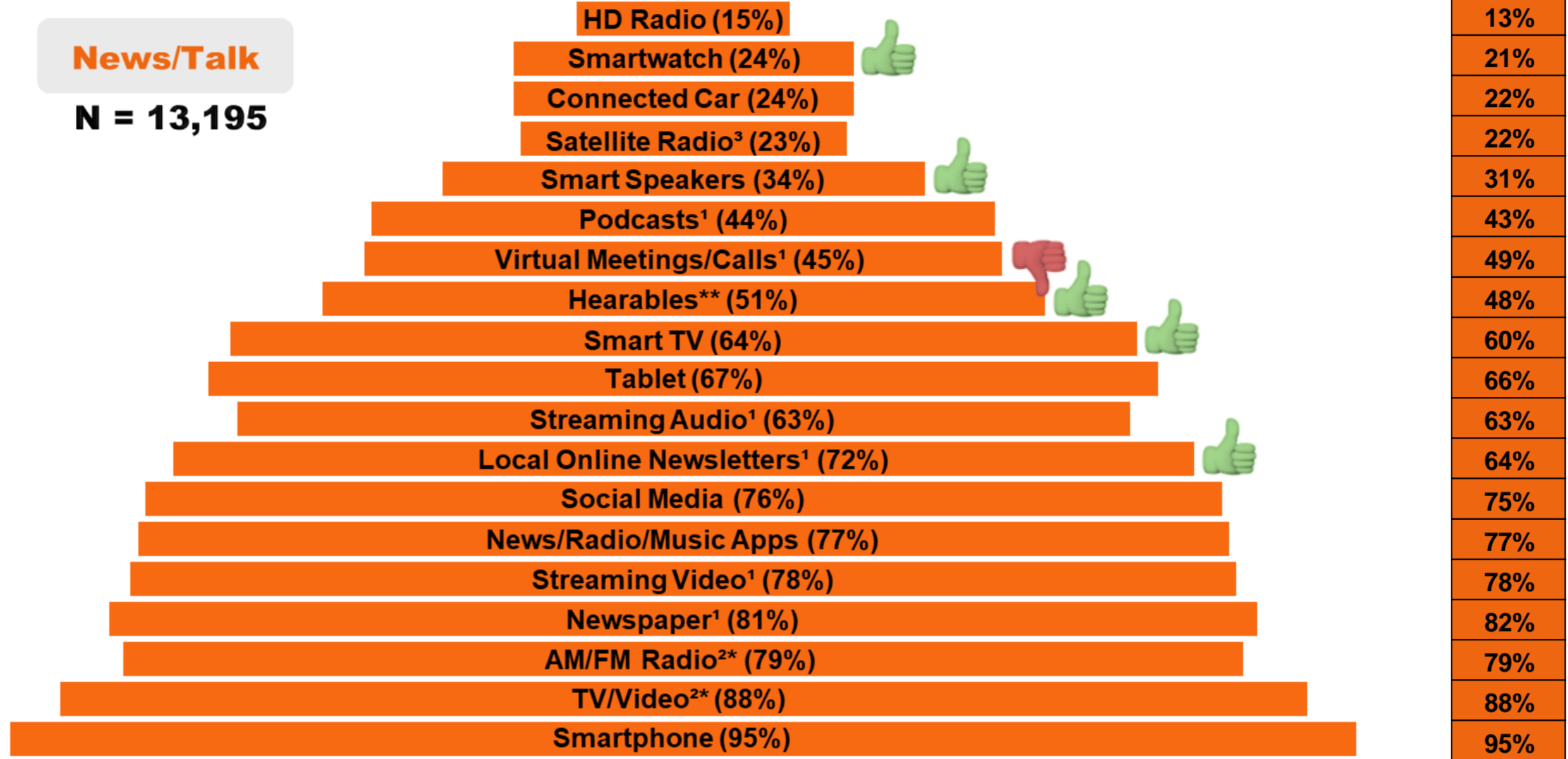
<sup>1</sup> Weekly or more <sup>2</sup> 1+ hour per day <sup>3</sup> Paid & trial users \*Any platform/device \*\*Wireless headphones/earbuds



# Media Pyramid 2023

## News/Talk

N = 13,195



### News/Talk PRTS 2022

13%
21%
22%
22%
31%
43%
49%
48%
60%
66%
63%
64%
75%
77%
78%
82%
79%
88%
95%

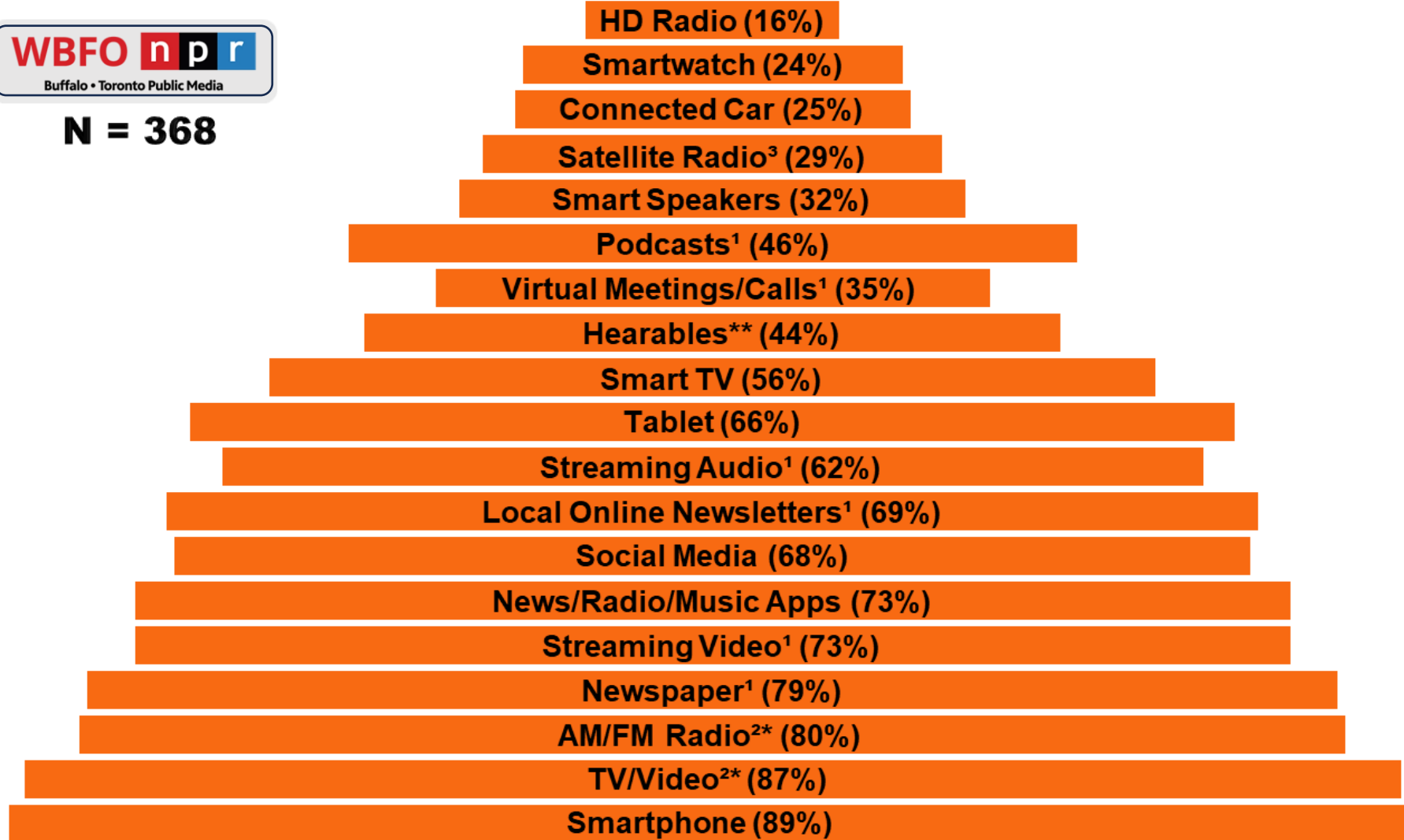
<sup>1</sup> Weekly or more <sup>2</sup> 1+ hour per day <sup>3</sup> Paid & trial users \*Any platform/device \*\*Wireless headphones/earbuds



# Media Pyramid 2023



**N = 368**



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

# A Community Focus Could Be Public Radio's Superpower

1. Embrace localism, listen to your community

In a media landscape where local journalism is in a state of crisis and where satellite radio, streaming services, and algorithmically programmed terrestrial radio are rapidly replacing local DJs, there is an important opening for local public media to complement nationally distributed content with original content that uniquely reflects and uniquely serves the communities from which it comes. In a legacy media landscape, where all broadcasters—not just public radio—are under pressure to achieve scale revenues and scale economies, public radio stands apart in that it is locally owned and operated, publicly supported, and has the power to generate measurable community impact. Far from being considered a competitive disadvantage or a reason to envy commercial “competitors,” being centered within the community is better thought of as public media’s unique superpower.

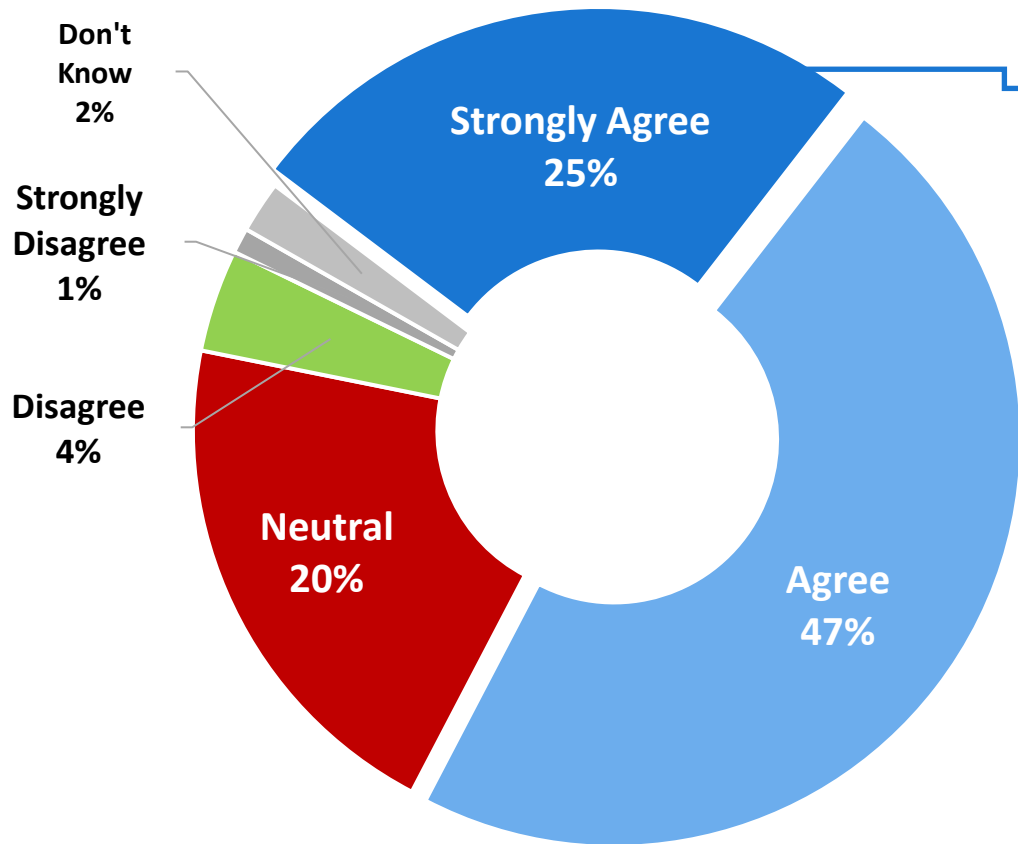


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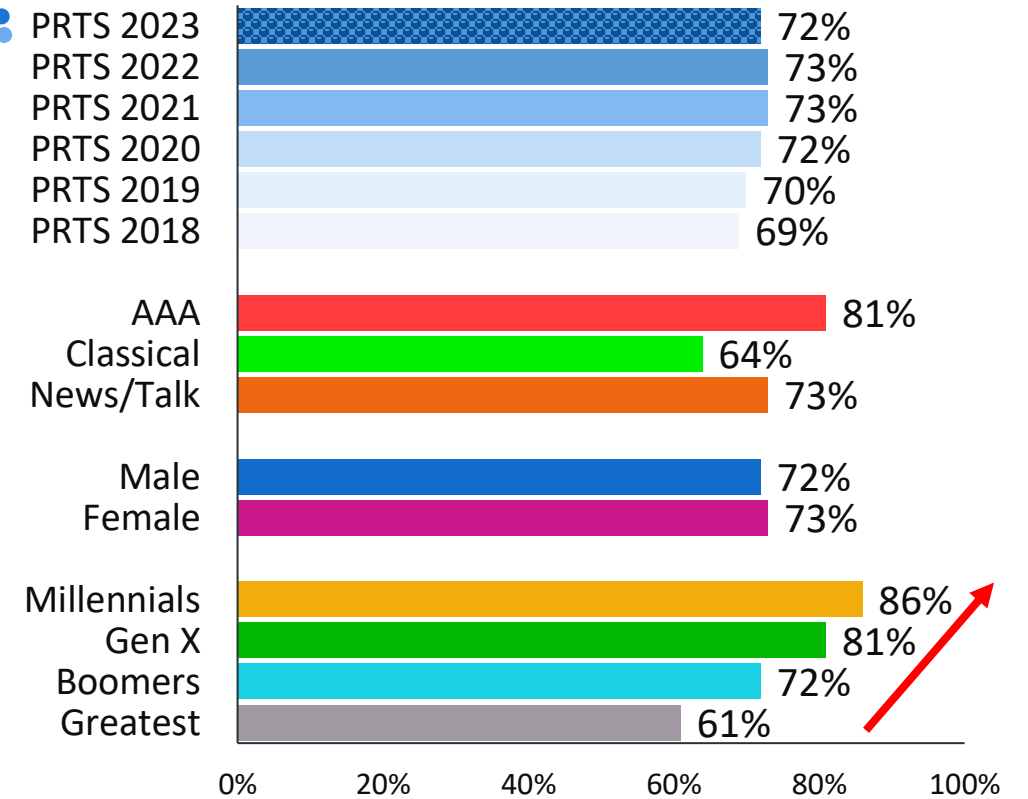
## Public Radio Playbook

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



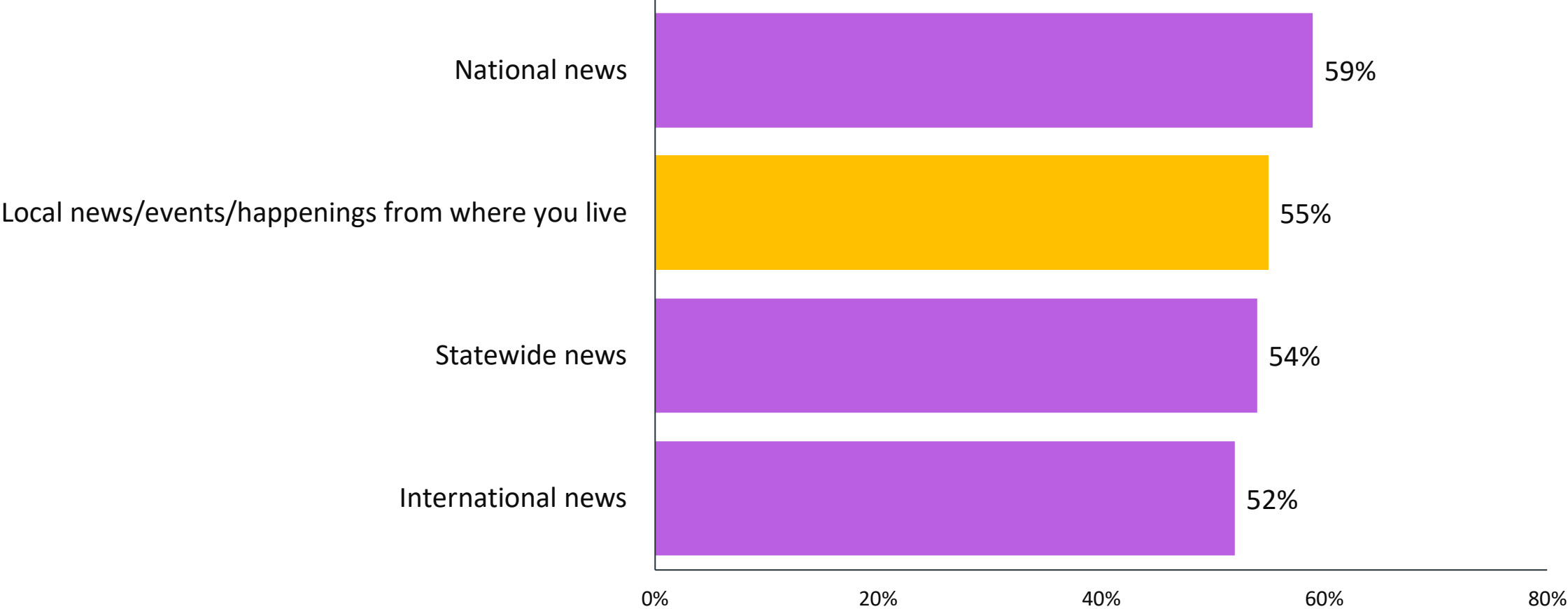
*"One of radio's primary advantages is its local feel"*

% Agreement (Strongly Agree + Agree)



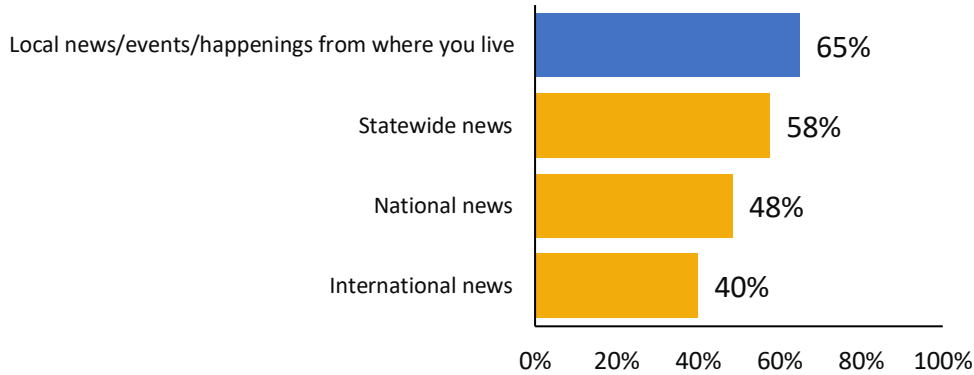
# All News Types Are of Interest But Local Is a Top Choice

% “Very Interested” in Hearing Each News Type Presented by Their P1 Station

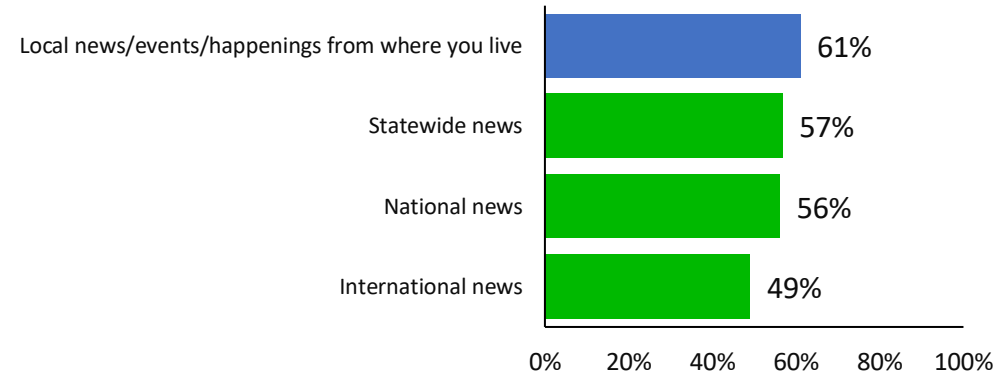


# Local News/Events/Happenings Are of Most Interest to Millennials and Gen Xers

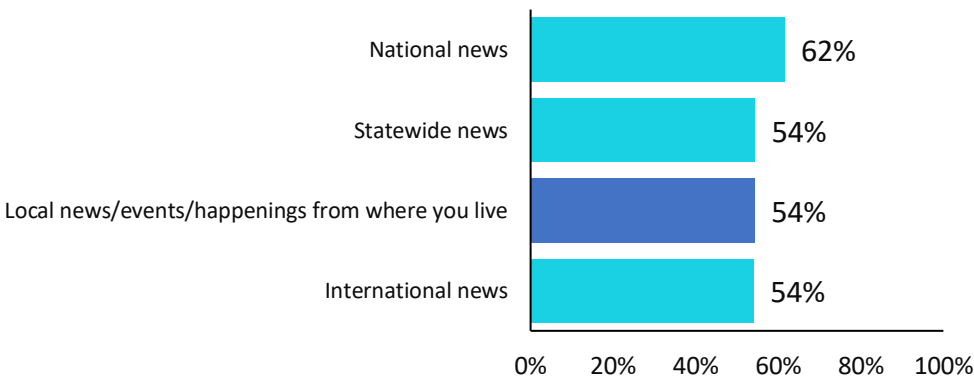
## Millennials



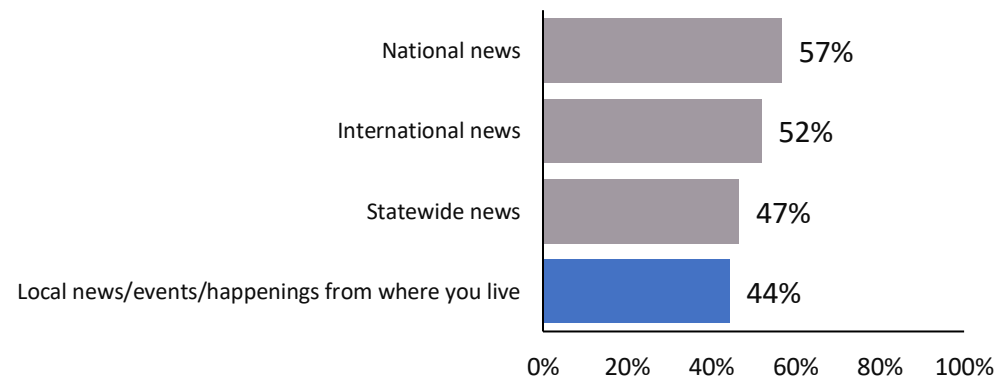
## Gen X



## Boomers



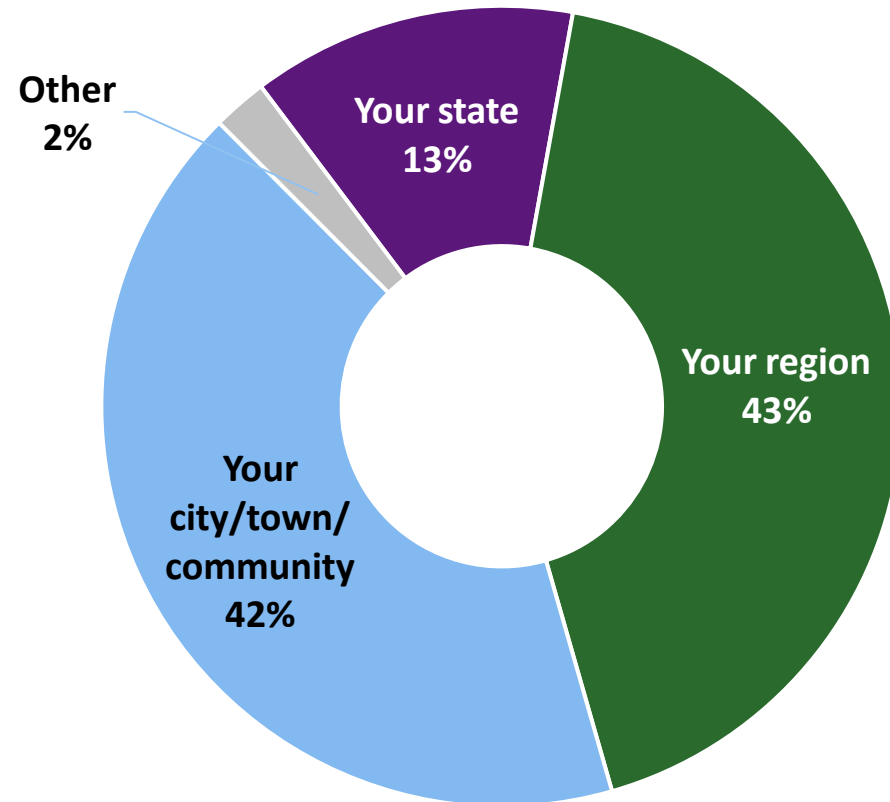
## Greatest



% "very interested" in hearing each news type presented by their P1 station

# Listeners' Region and City/Town/Community Are Perceived Equally as "Local"

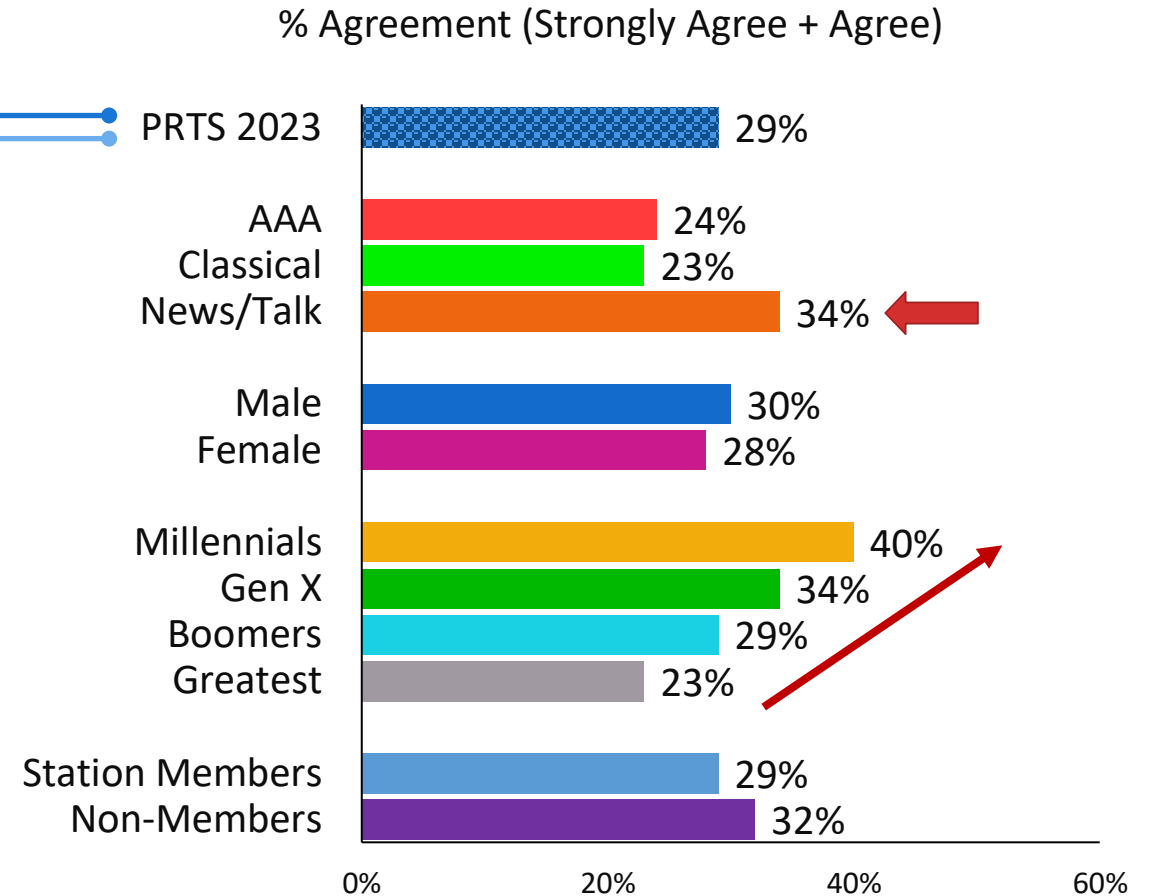
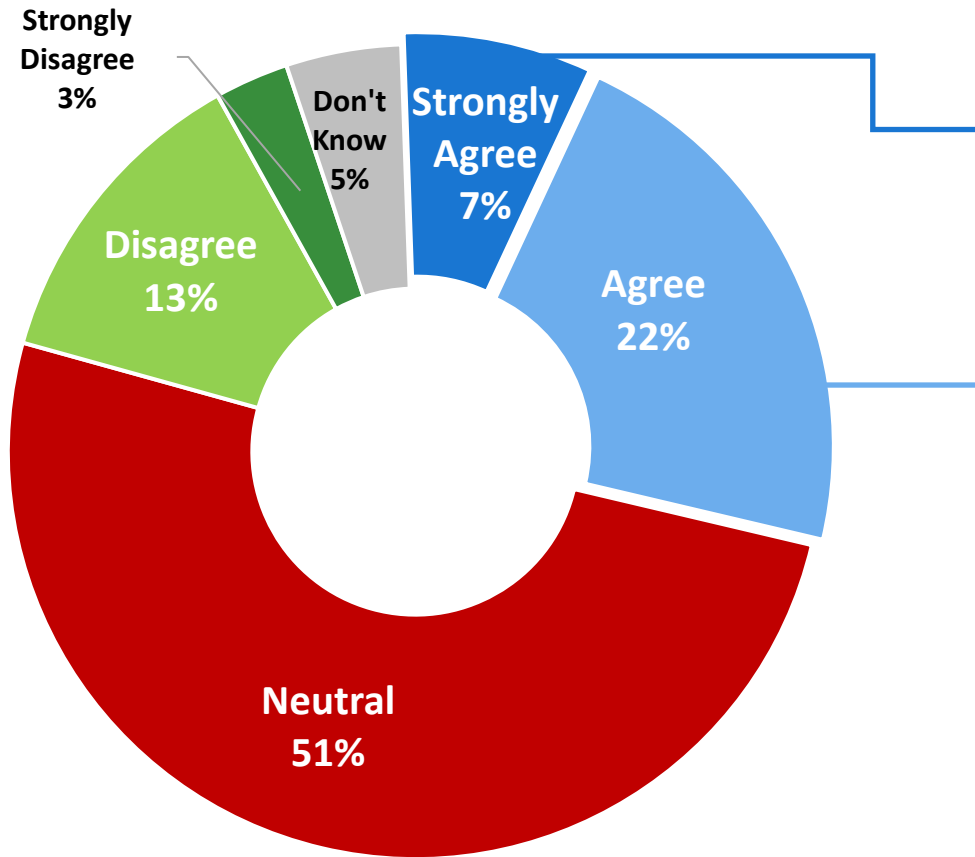
*"When you think of what it means to be 'local,' which of the following best defines 'local' to you?"*



Among those very/somewhat interested in local news/events/happenings coverage presented by P1 station



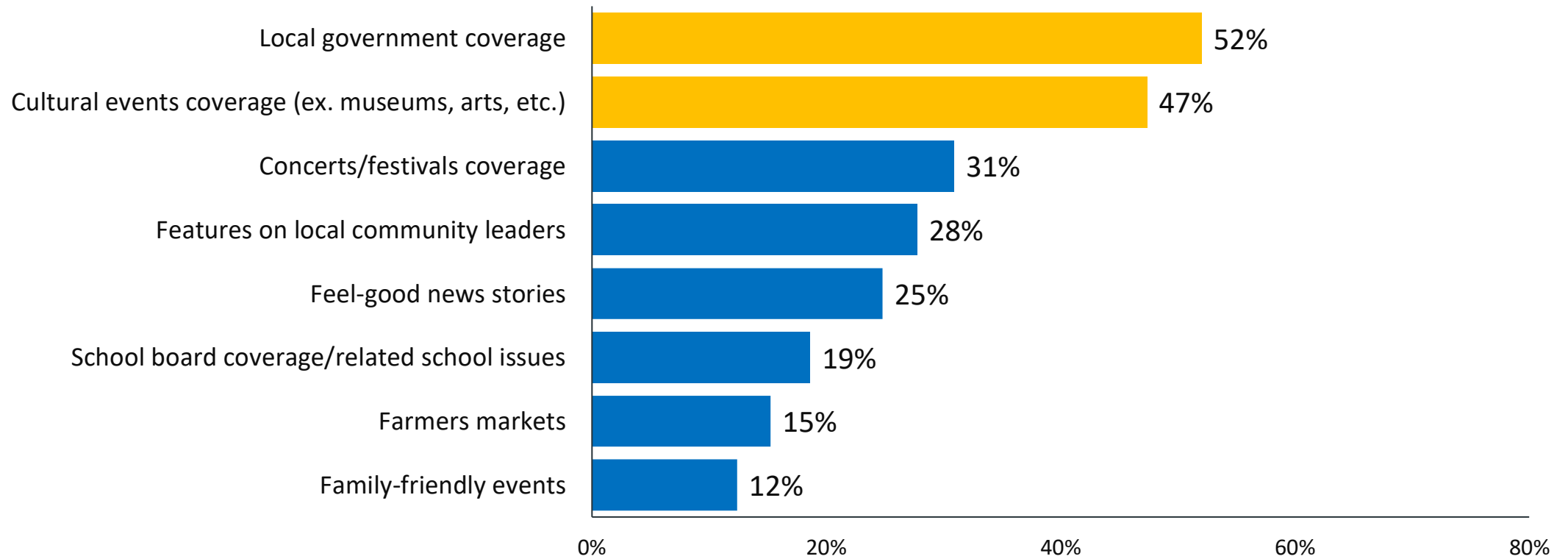
# Millennials and News/Talk Fans Are Most Interested in More Locally-Produced Programming From Their Favorite Public Radio Station



*"I wish THE STATION THAT SENT ME THIS SURVEY was able to produce more locally originated programming content"*

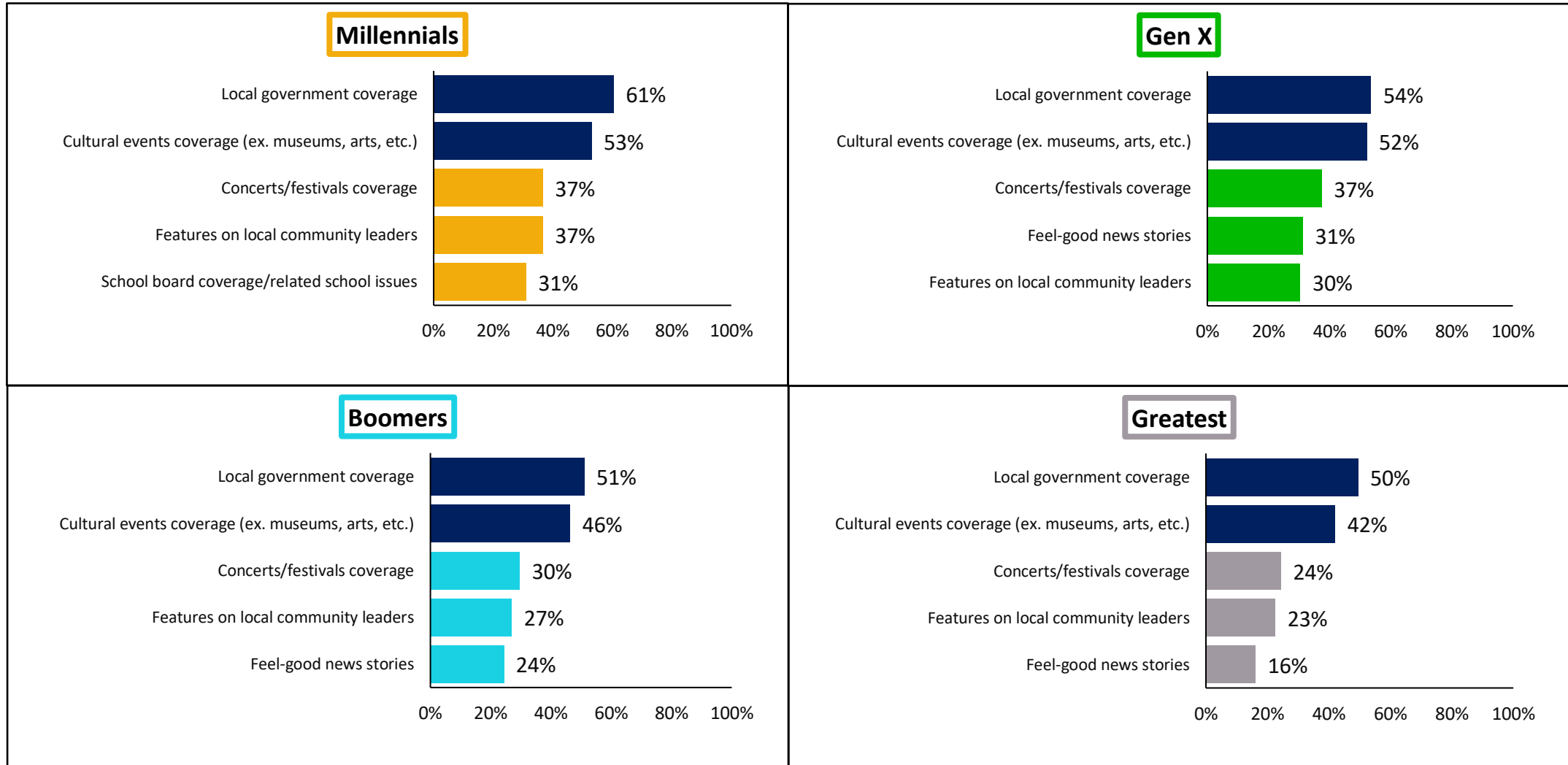
# Local Government and Cultural Events Are of Most Interest Among the Coverage Areas Tested

% “Very Interested” in Hearing Each Local News/Events/Happenings Coverage Presented by Their P1 Station



Among those very/somewhat interested in local news/events/happenings coverage presented by P1 station

# Generationally, It's a "Sweep" For Local Government Coverage With Cultural Events Finishing in a Solid Second Place Position



Among those interested (very + somewhat) in local news/events/happenings coverage presented by P1 station, % "very interested" in hearing each presented by their P1 station (top 5 items shown among those asked)

# Establish “Eye Contact” With the Audience



Whether in the form of live performances featuring local artists, moderated public discussions of important civic issues, or celebrating partnerships with other local organizations at beloved community festivals, public media needs to be literally, tangibly in the marketplace, not just virtually, digitally so.



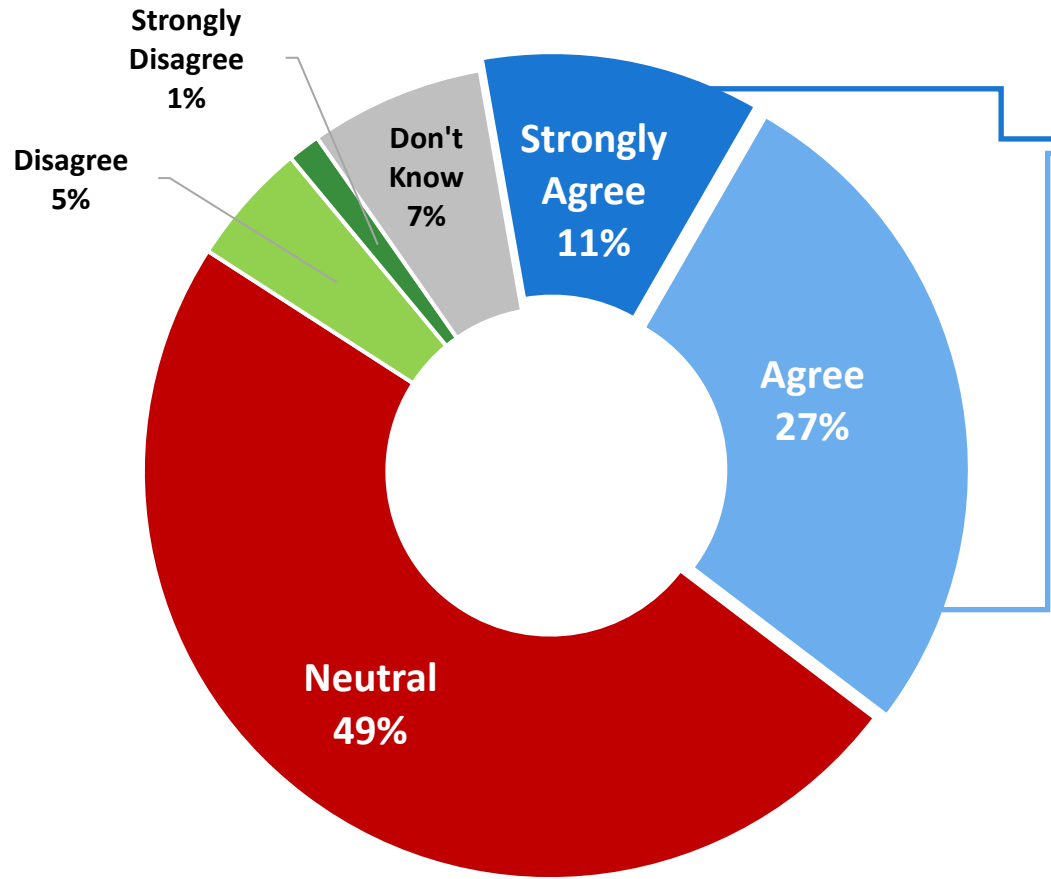
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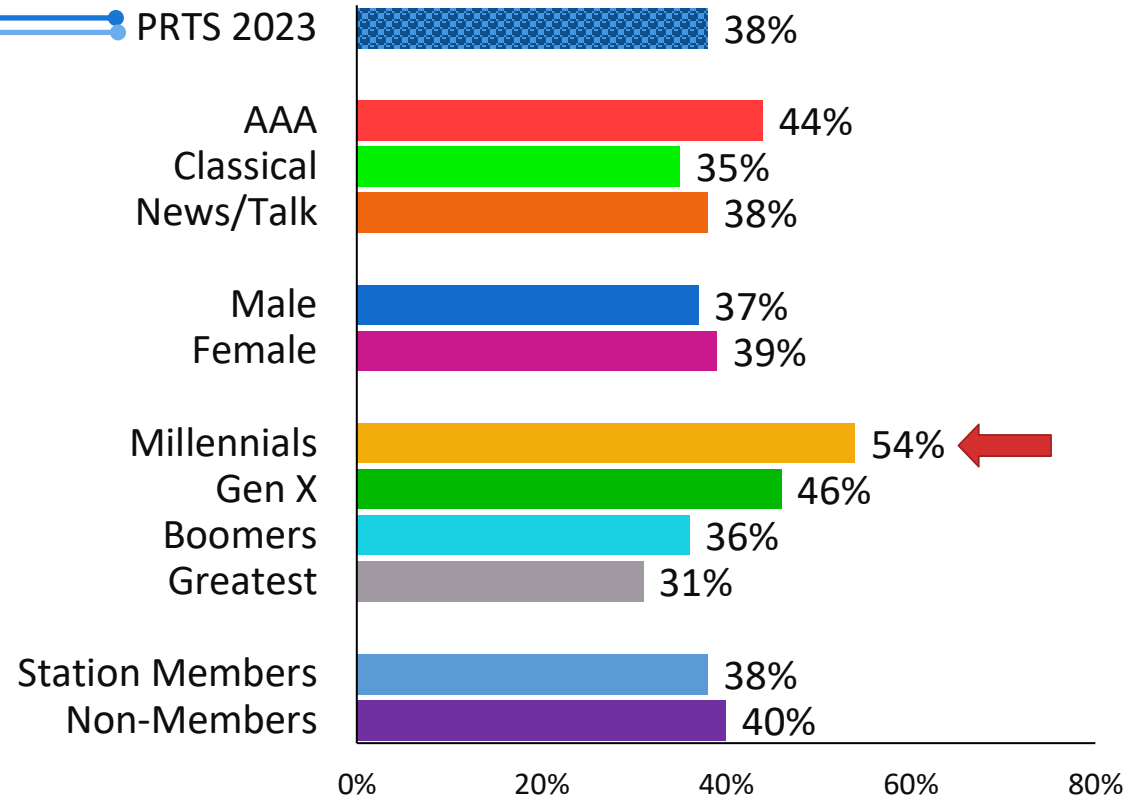


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# Core Fans Say They Would Like to See Their Public Radio Station at Festivals, Concerts and Events

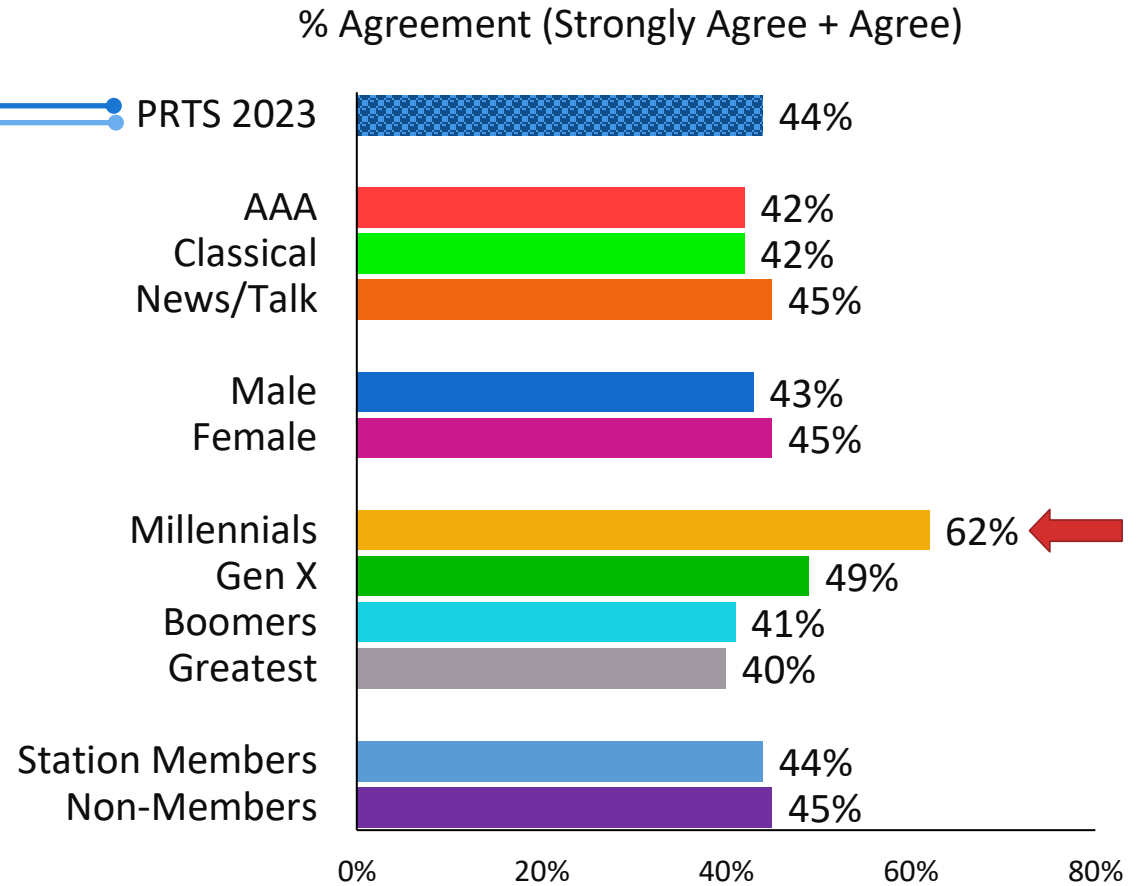
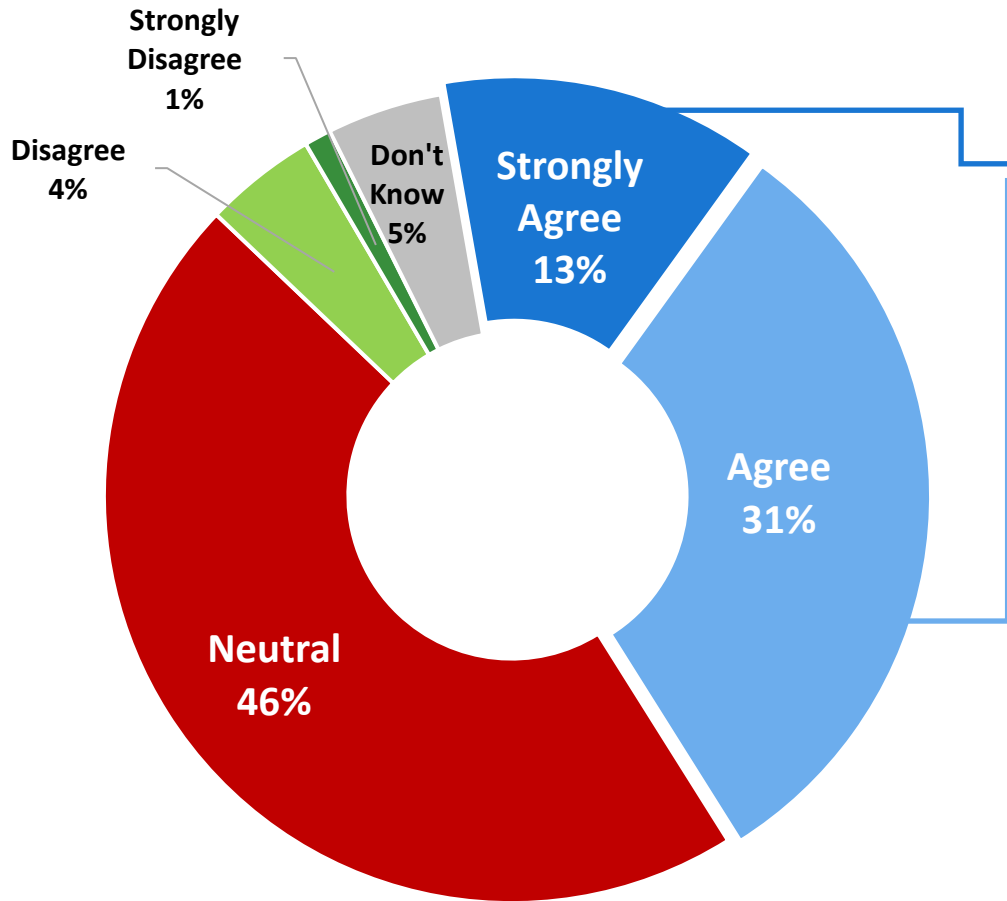


% Agreement (Strongly Agree + Agree)



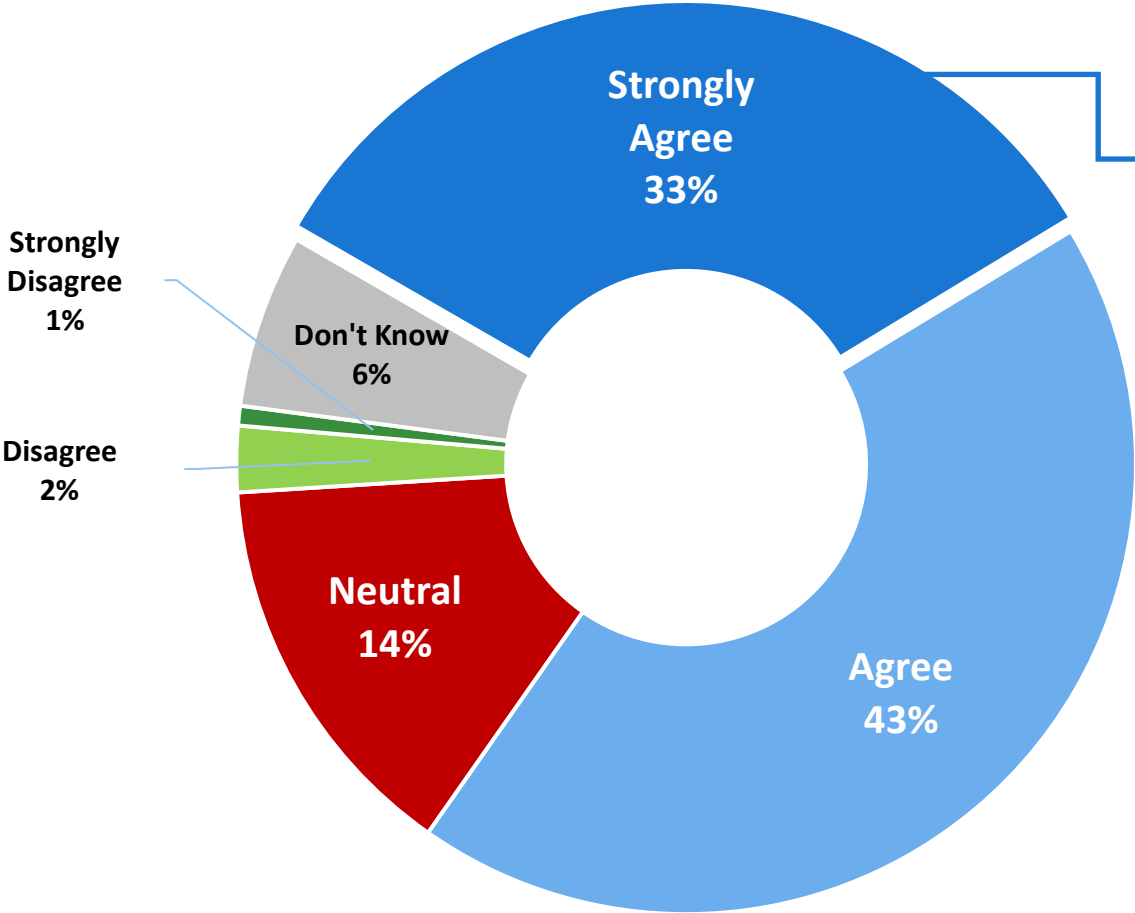
*"I would like to see THE STATION THAT SENT ME THIS SURVEY be more visible at local places like festivals, concerts, events, etc."*

# There Is Support For Greater Visibility in the Community For Public Radio Stations, Especially Among Millennials

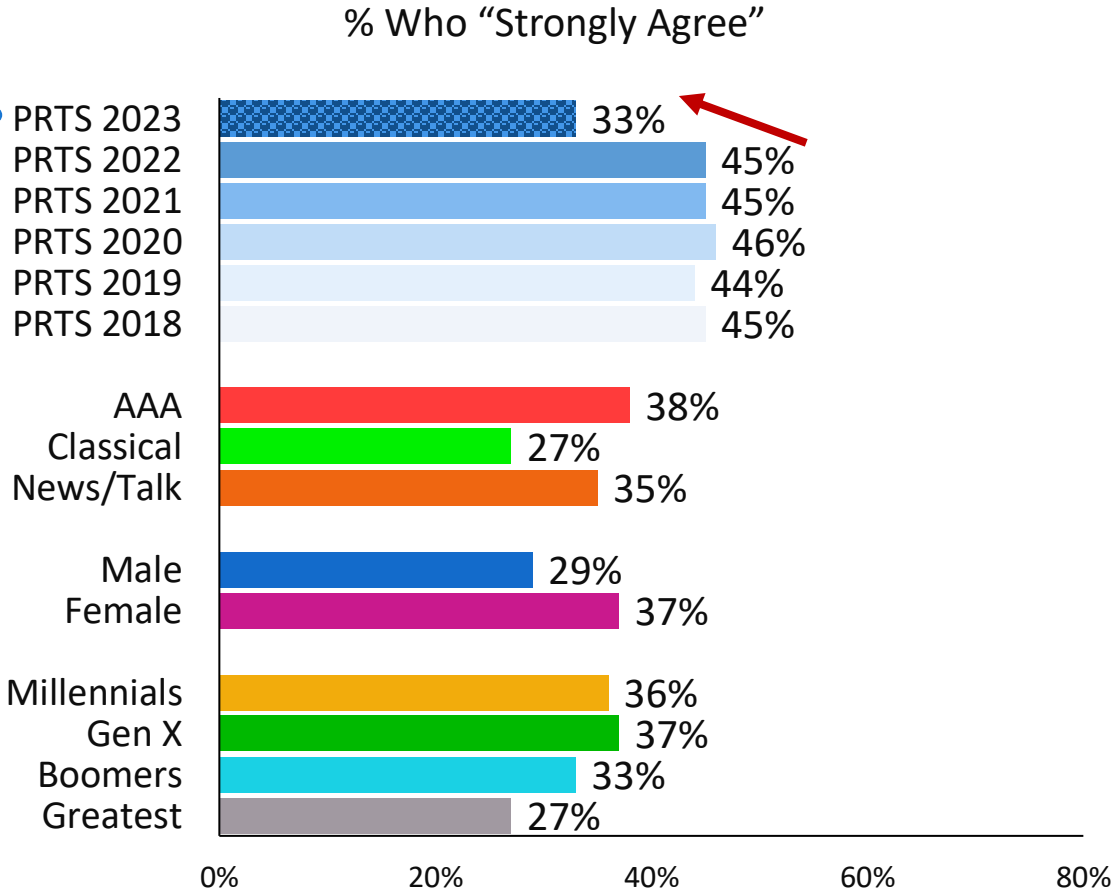


*"I would like to see THE STATION THAT SENT ME THIS SURVEY be more visible in my community"*

# The 2023 Survey Shows a Precipitous Drop For Strong Community Connection



*"THE STATION THAT SENT ME THIS SURVEY is well connected to the local community"*







# Focus Fundraising On Local Impact – Bettering the Community

Historically, public radio has adopted as its primary measures of success the (questionably estimated) ratings for its terrestrial broadcasts and the size of its fundraising haul. But in the current landscape, there is an opportunity to focus not just on audience size and dollars from on-air fundraising, but on impact in the community. Has the local public media organization helped quench the thirst of a local news desert? Has it given local artists a platform from which to be discovered? Has it helped folks on the margin of the community to tell their stories? Has it elevated the difficult discussions around justice or the climate? These, too, are measures of success. And industry research shows that there is a cohort of prospective donors out there ready to support these efforts, not just pay for access to Morning Edition.

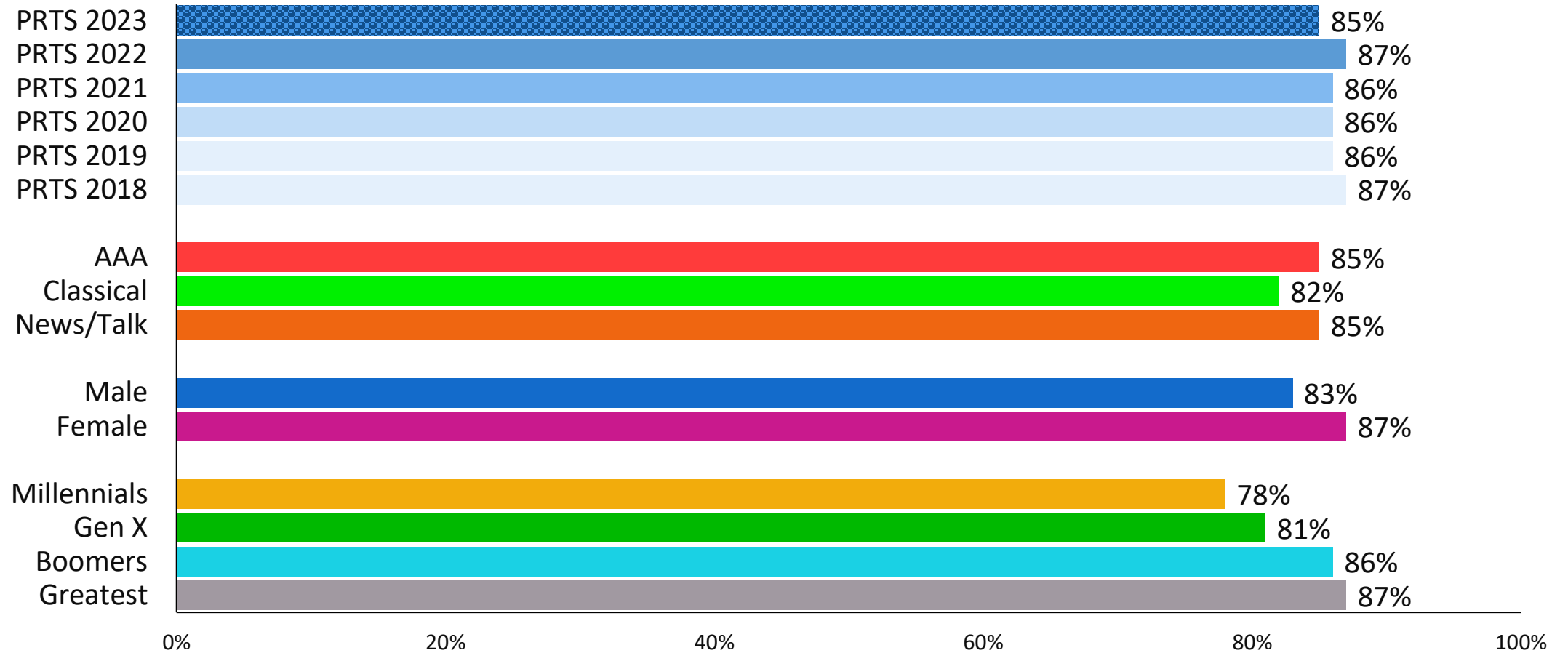


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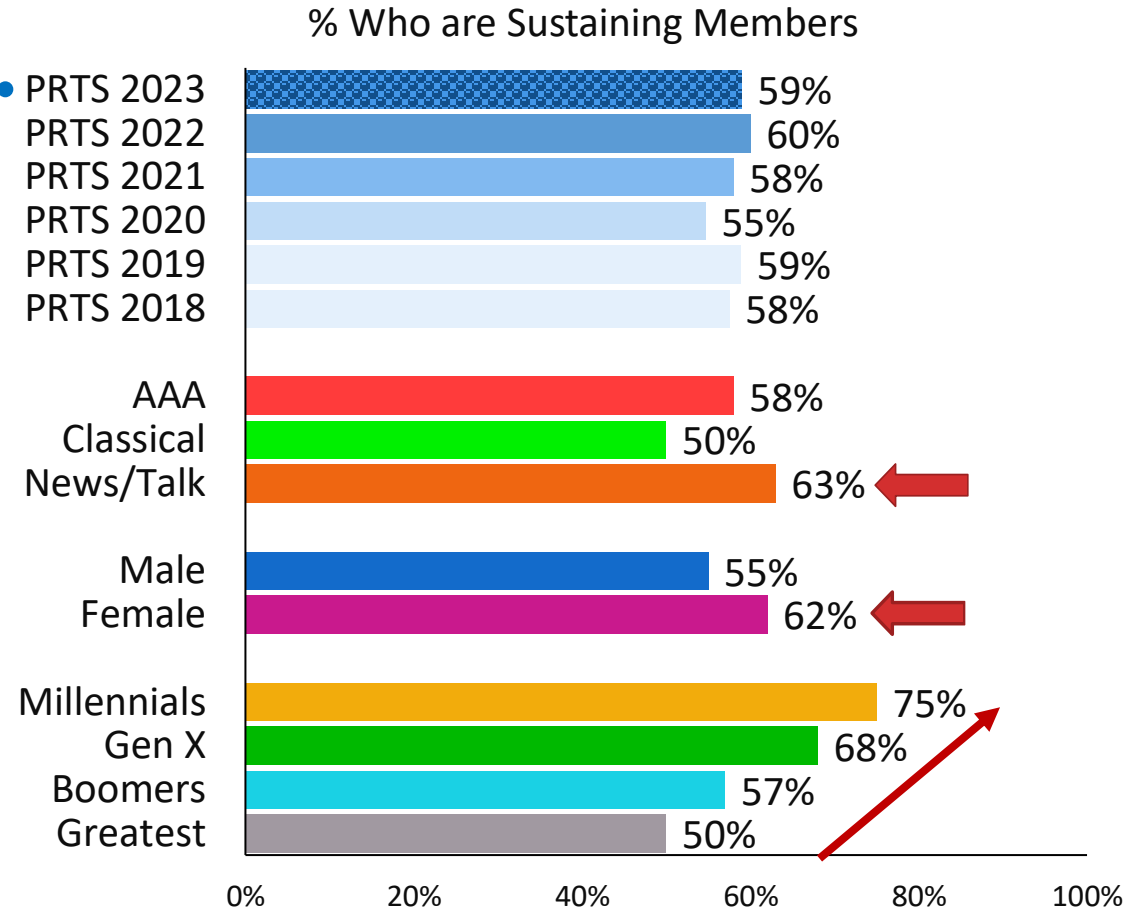
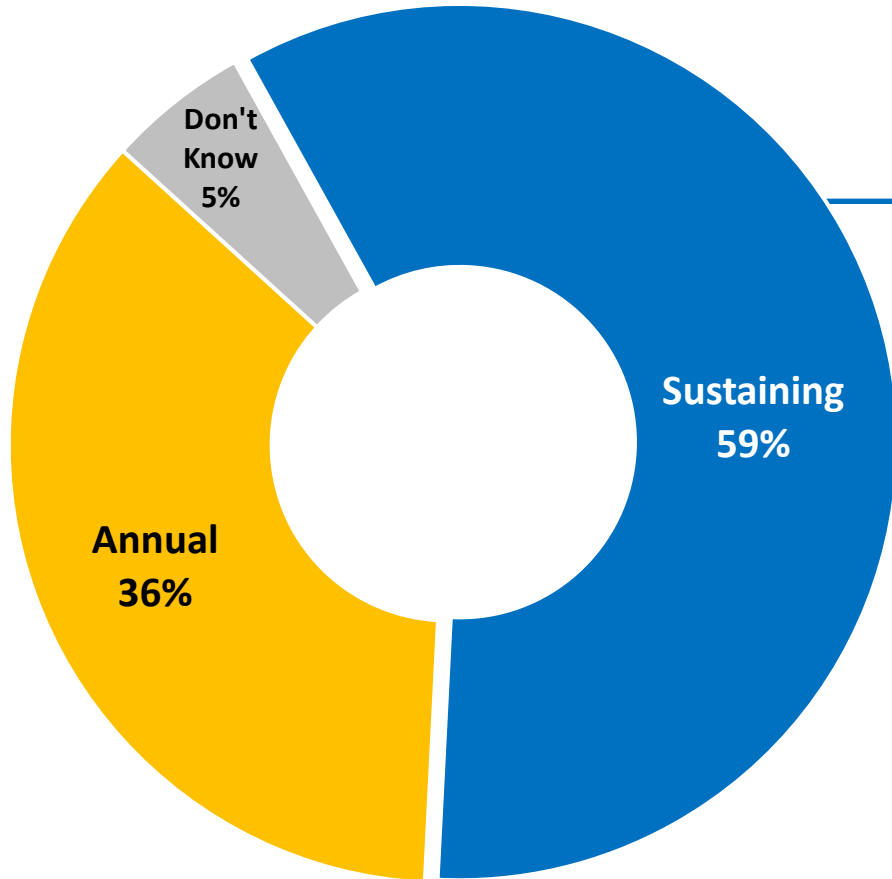
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# Station Membership Remains Mostly Consistent Across the Board



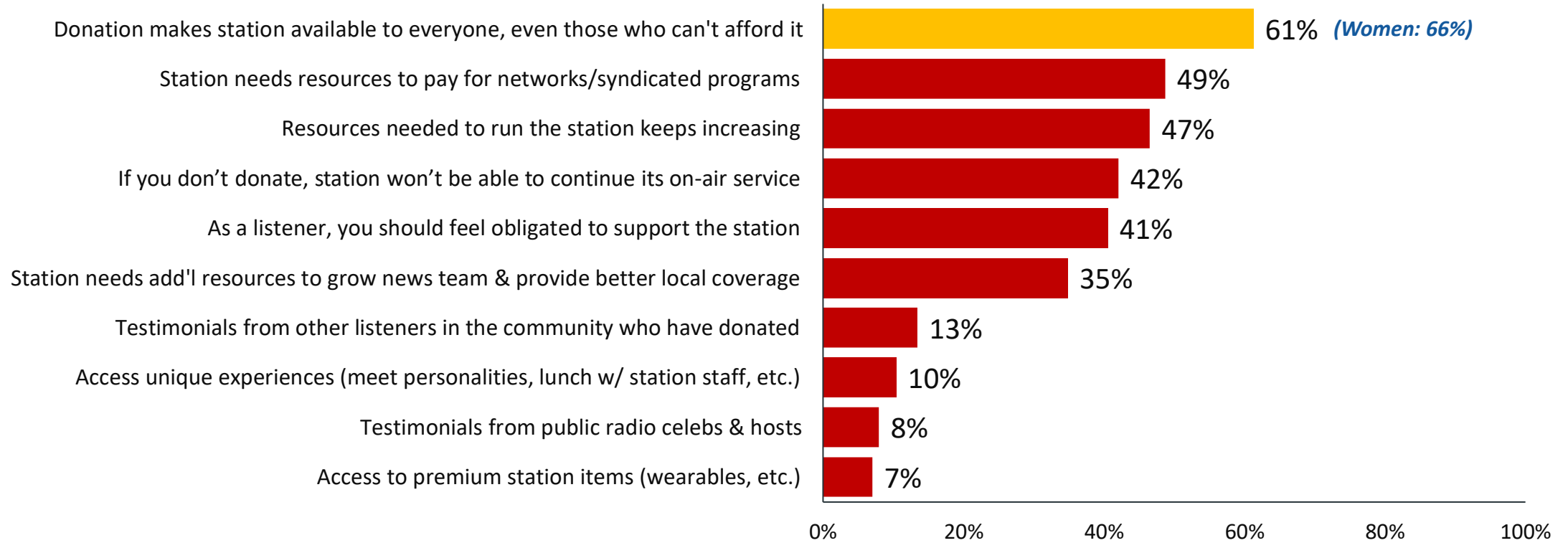
# Sustaining Membership Is Rock Solid, Strongest Among Millennials, Gen Xers, Females, and News/Talk Fans



Among Public Radio members

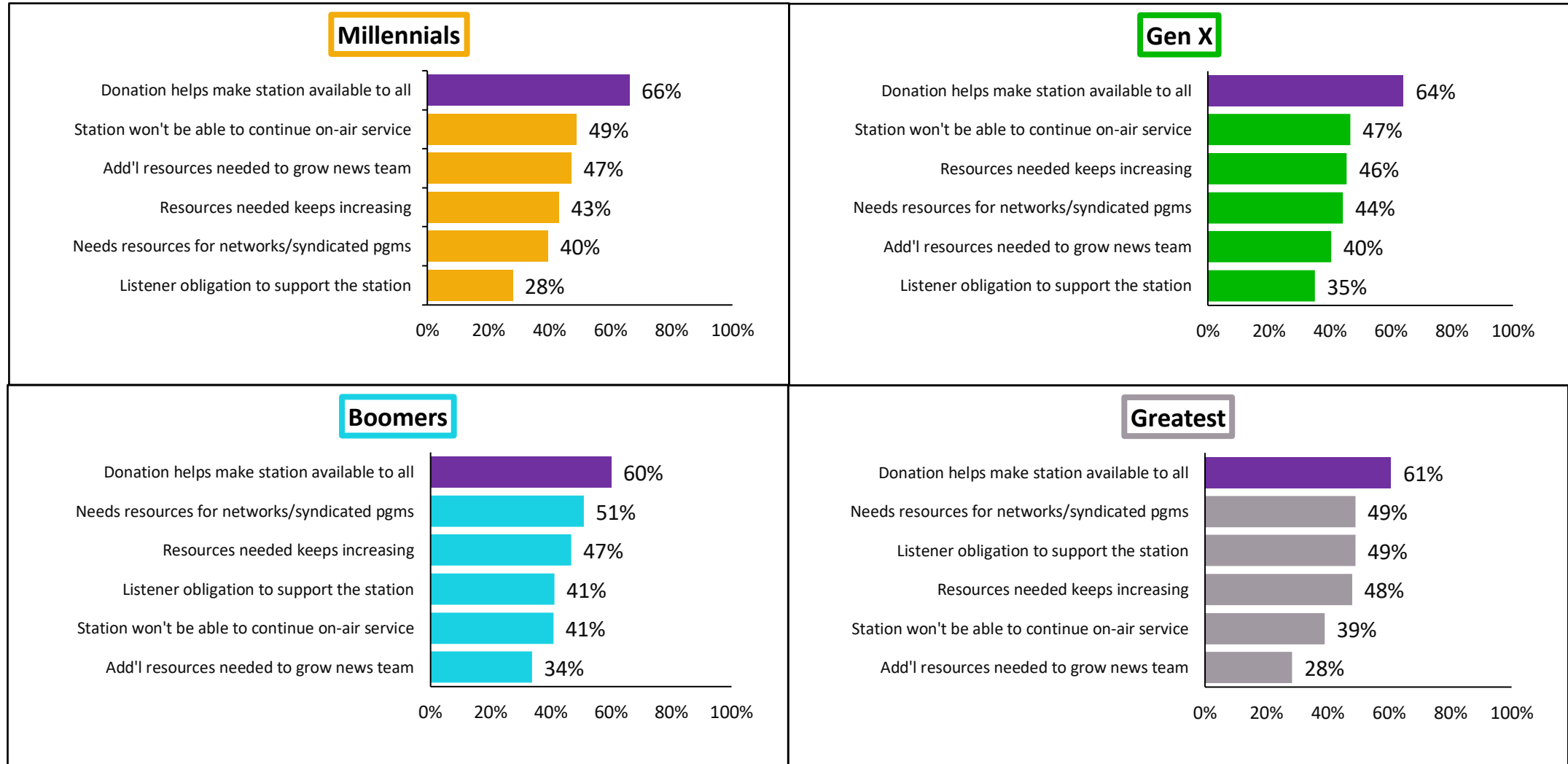
# The Top Appeal: Donations Make the Station Available to Everyone

*“Of the following list of appeals/offers THE STATION THAT SENT YOU THIS SURVEY might make during its fundraising efforts – which of these are most likely to impact your decision to make a financial contribution to the station?”*



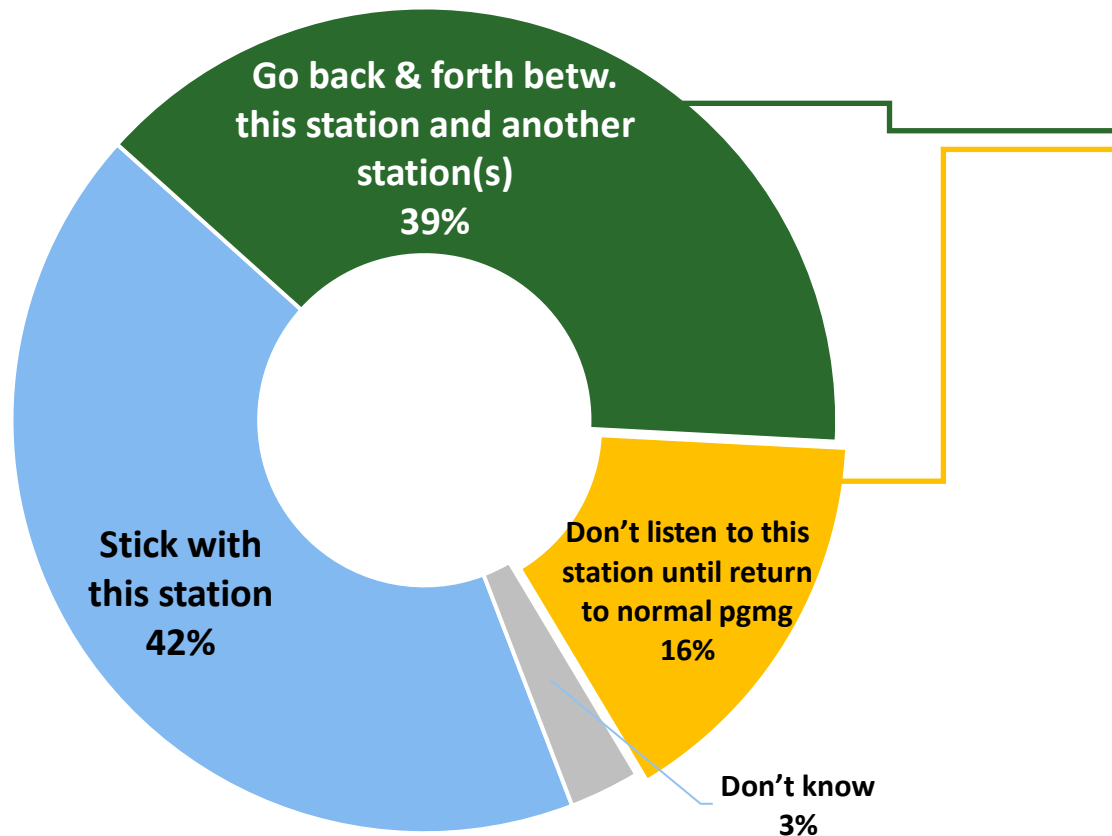
multiple responses accepted

# While Secondary Appeals Vary By Generation, the Most Impactful Is Donations Making the Station Available to All

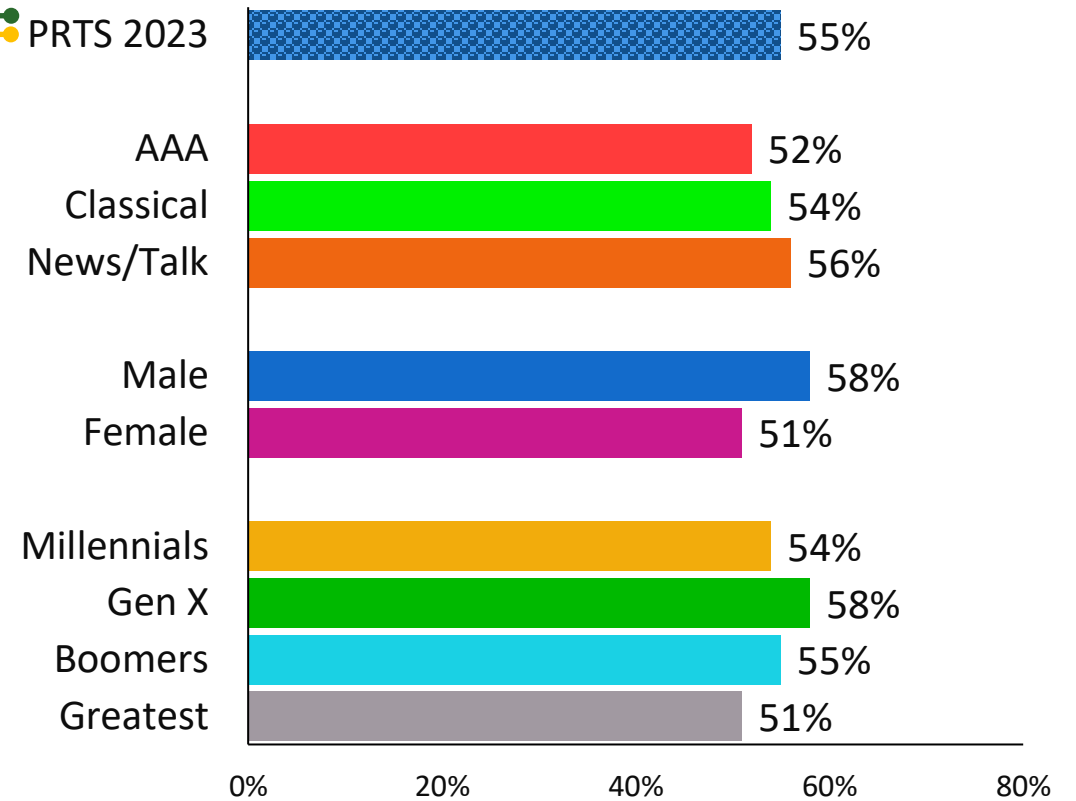


*“Of the following list of appeals/offers THE STATION THAT SENT YOU THIS SURVEY might make during its fundraising efforts – which of these are most likely to impact your decision to make a financial contribution to the station?” (top 6 items mentioned among those asked – multiple responses accepted)*

# Fund Drives Cause Tune-out Across-the-Board, Impacting a Majority of Public Radio Core Fans



% Switching Away at Least Occasionally When P1 Station Is in a Fundraising Drive

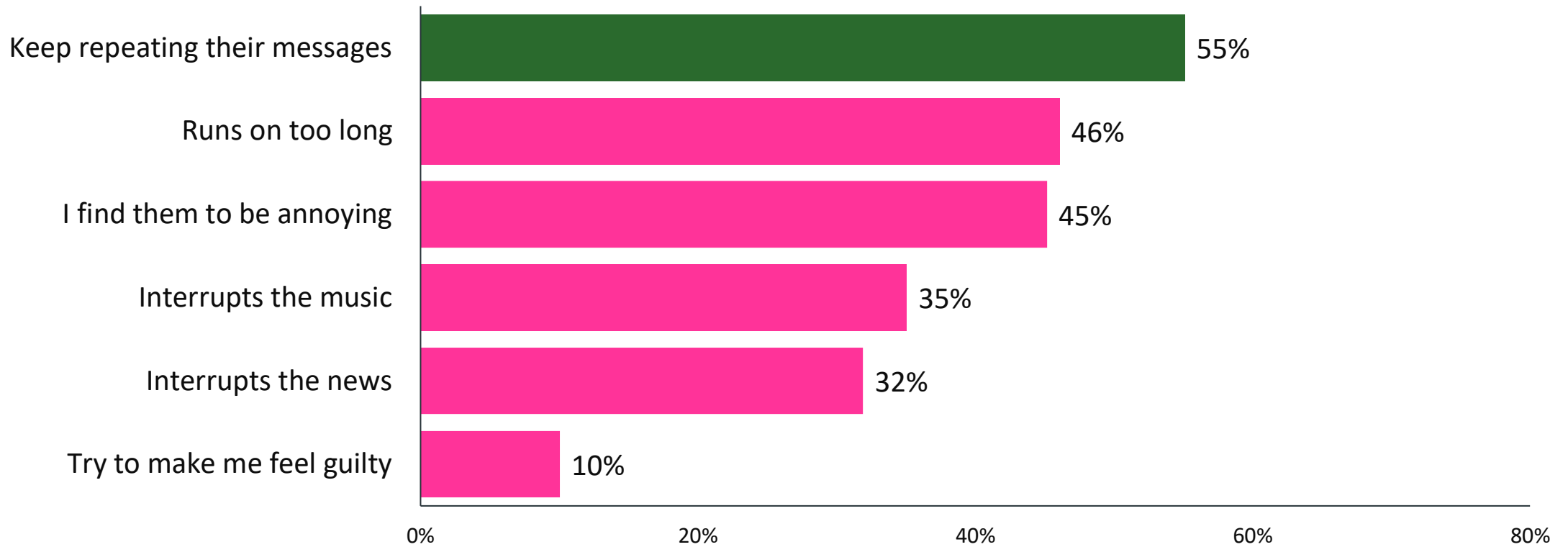


*“When THE STATION THAT SENT YOU THIS SURVEY is in a fundraising drive, which of the following best describes how you listen?”*

# What Causes the Most Tune-Out?

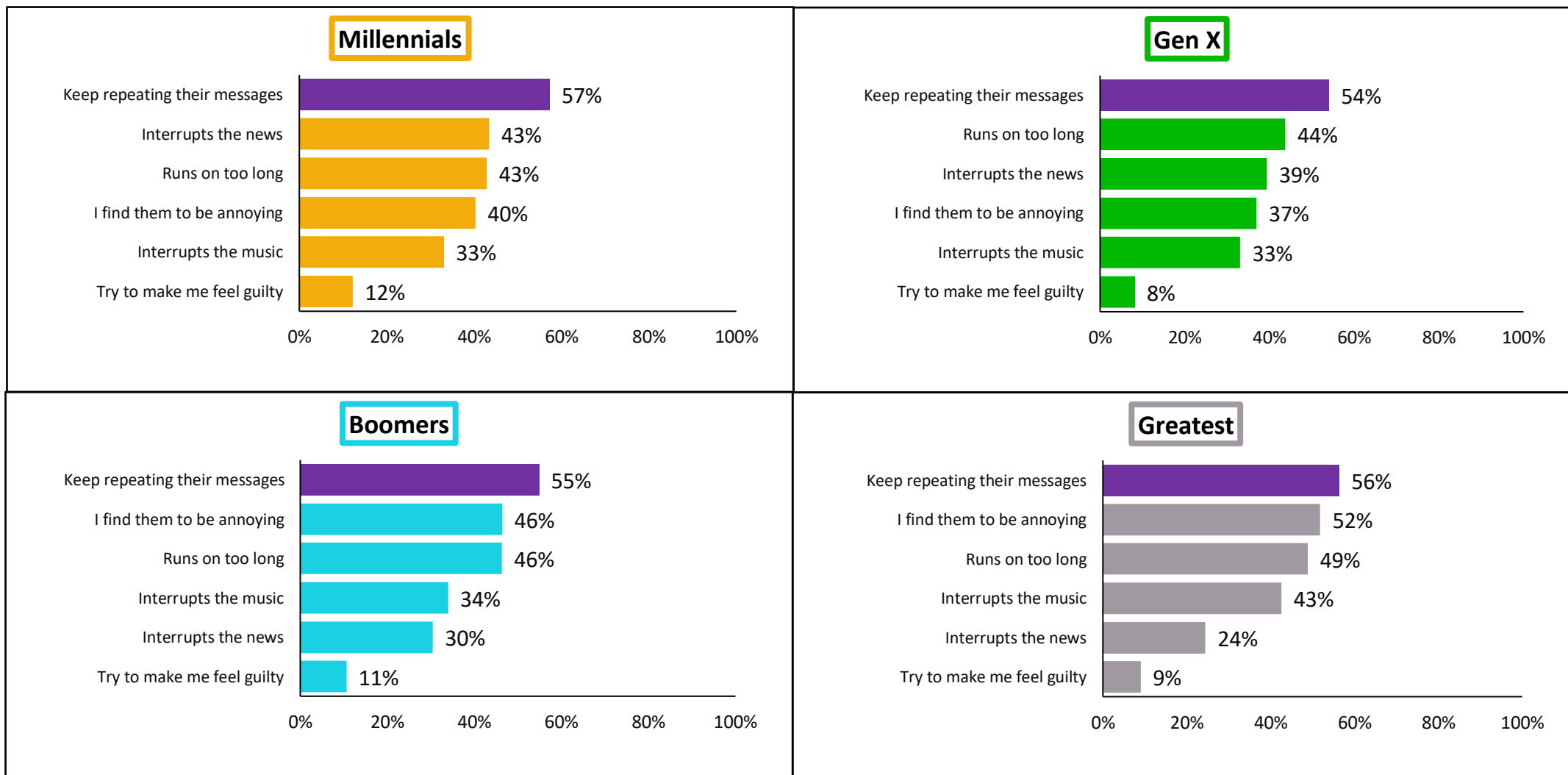
## Repetitive Messaging Is the Main Culprit

Among Those Who at Least Occasionally Switch Away From Their P1 Station When It Is in a Fundraising Drive, % Mentioning Each as Reason They Do So



Among a list of presented options (multiple responses accepted)

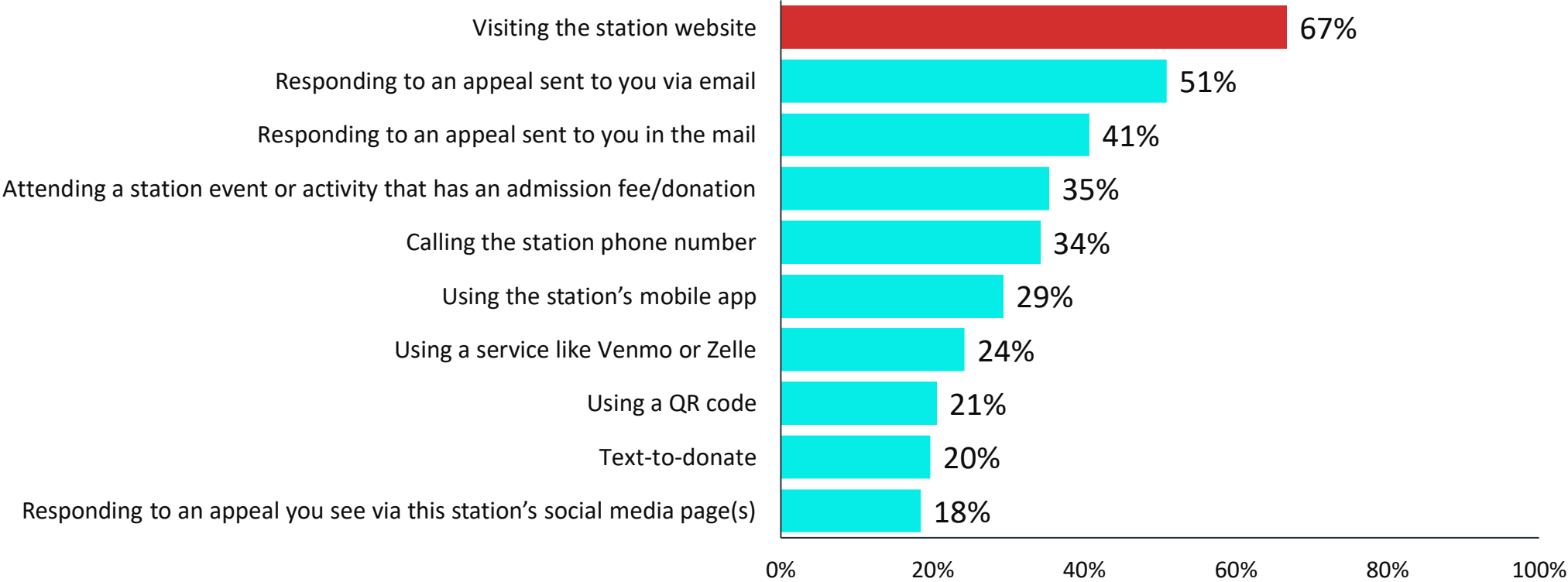
# Repetitive Appeals During Fund Drives Is the Top Reason to Switch Stations Across All Four Generational Groups





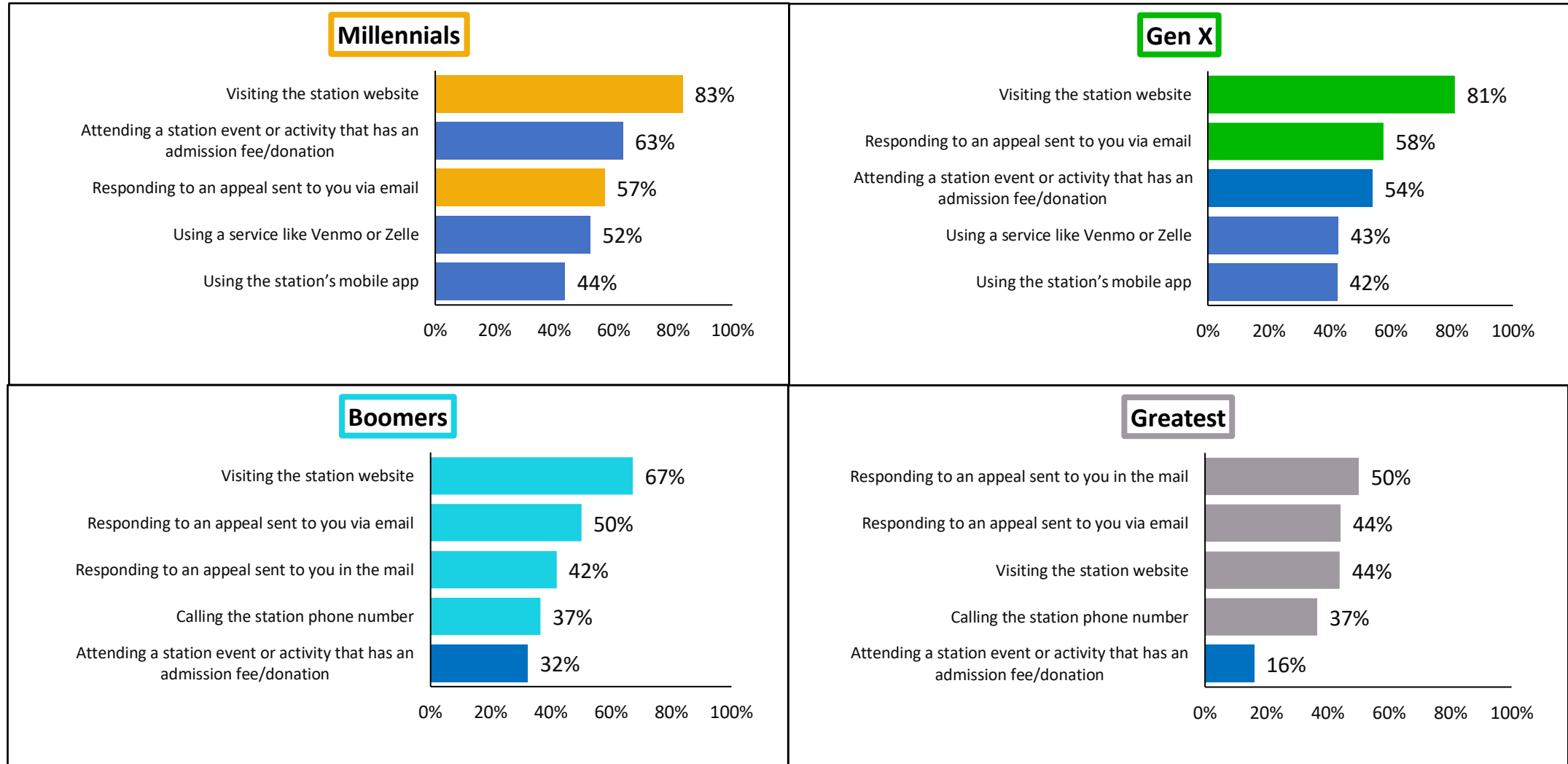
# Visiting the Station Website Is the Top Donation Method, But Secondary Payment Platforms Differ By Demographic

% Interested (Very + Somewhat) in Each Method of Donating to Their P1 Station



# Secondary Fundraising Avenues for Millennials and Xers?

## Station Events and Payment Services (ex: Venmo)



% interested (very + somewhat) in each method of donating to their P1 station  
(top 5 donation methods shown among those asked)

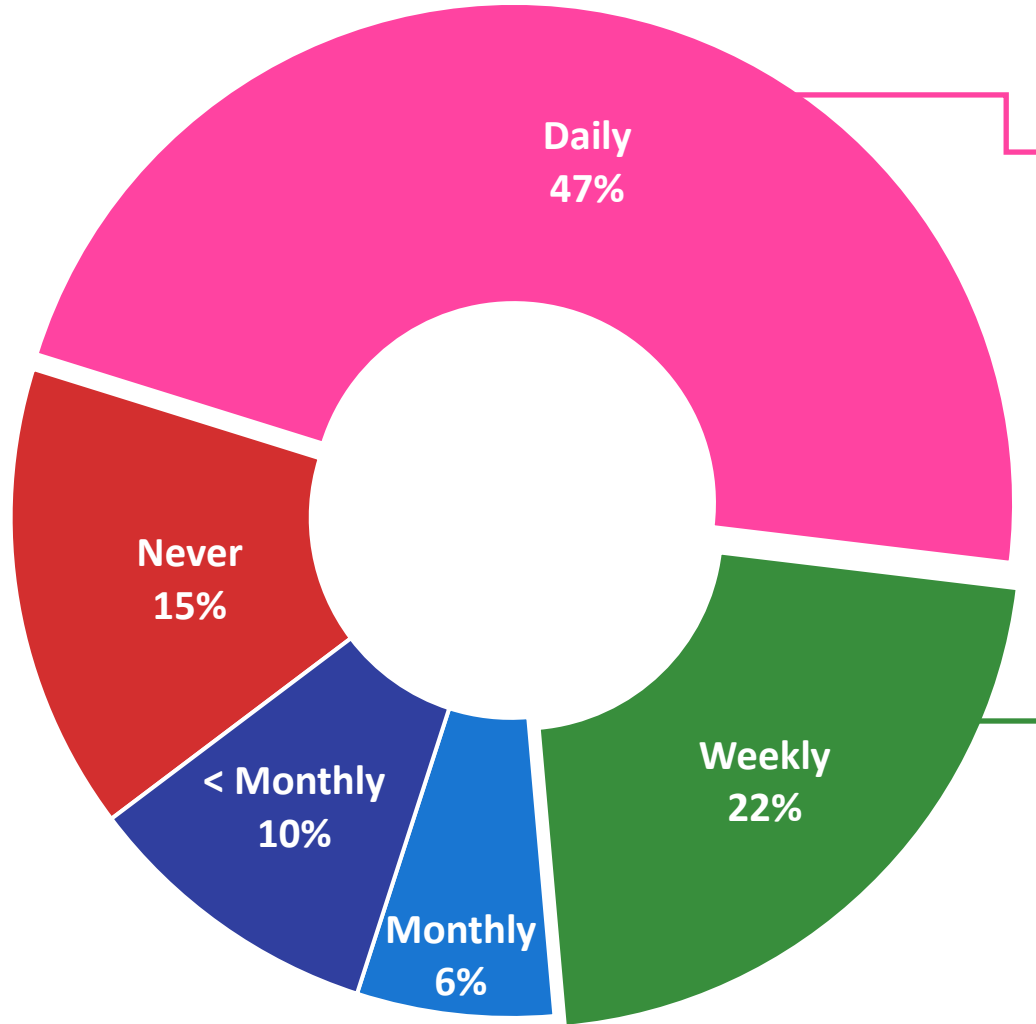
# Establish and Optimize the Newsletter Opportunity

And in a universe where direct-to-consumer marketing in the form of e-newsletters has proliferated, we also need to understand the value users hope to derive from newsletters and what sets successful ones apart. The focus here would be on understanding the gratifications users derive from these products and formats and where public media can stake its claim.

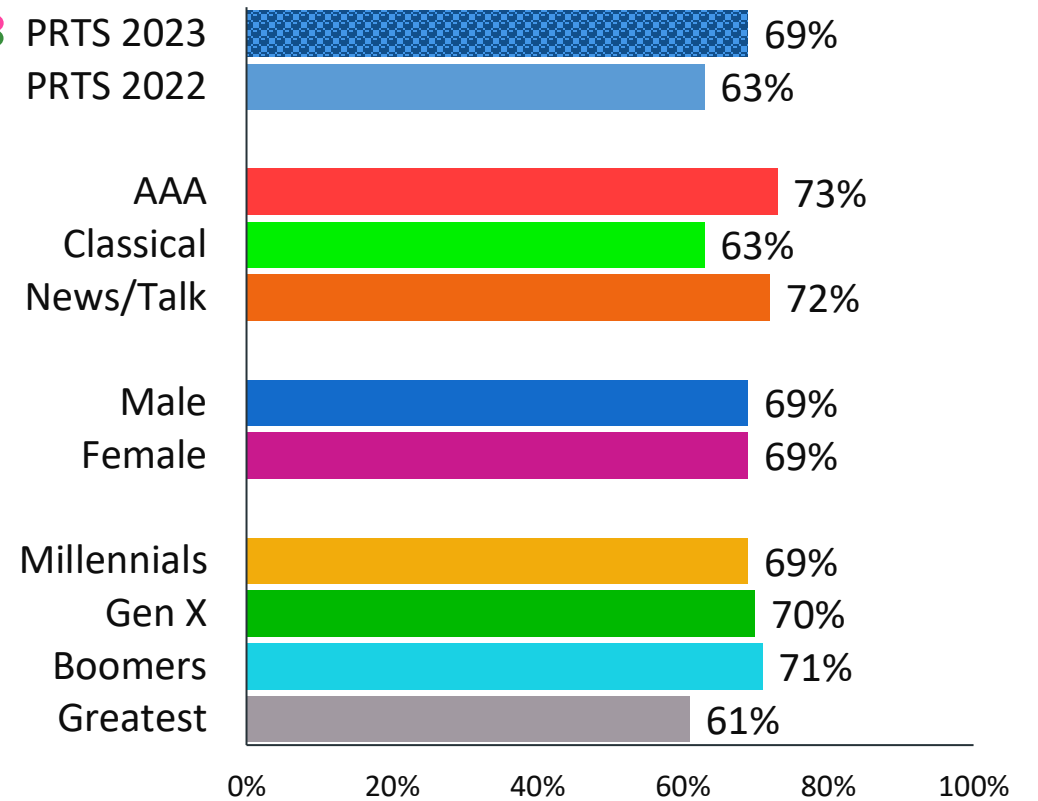


**Public Radio  
Playbook**

# Nearly Seven in Ten Read Online Newsletters Featuring Coverage of Their Local Areas/Regions Weekly or More

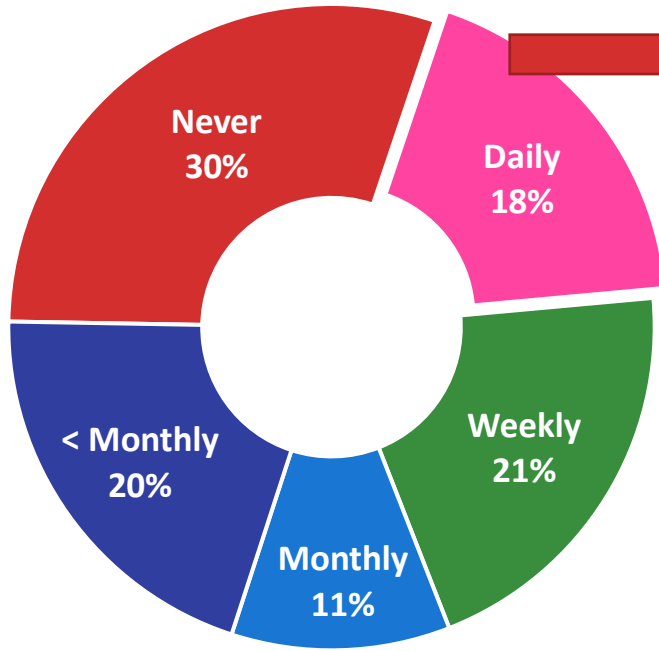


% Who Read Online Newsletters That Provide News on the Area/Region in Which They Live Weekly or More

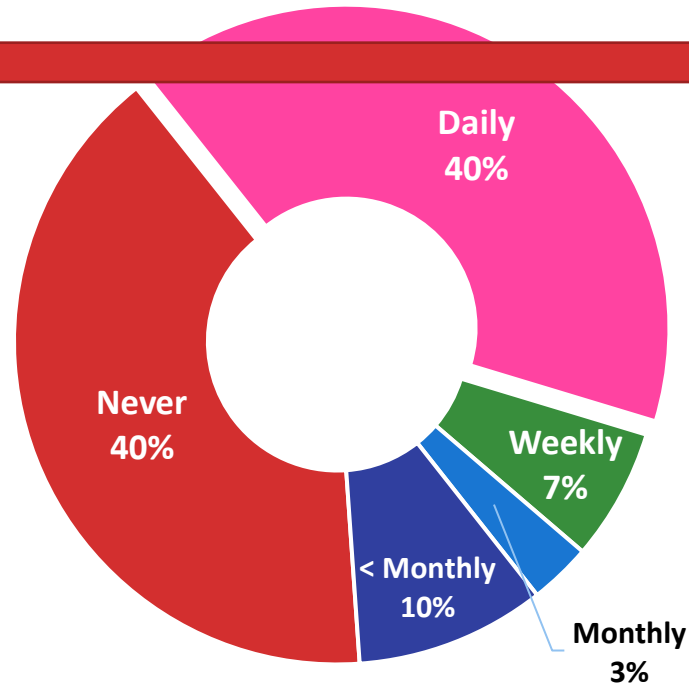


# Playing Online Word Games and Reading Local Newsletters Is More Habitual For Public Radio Fans Than Listening to Podcasts

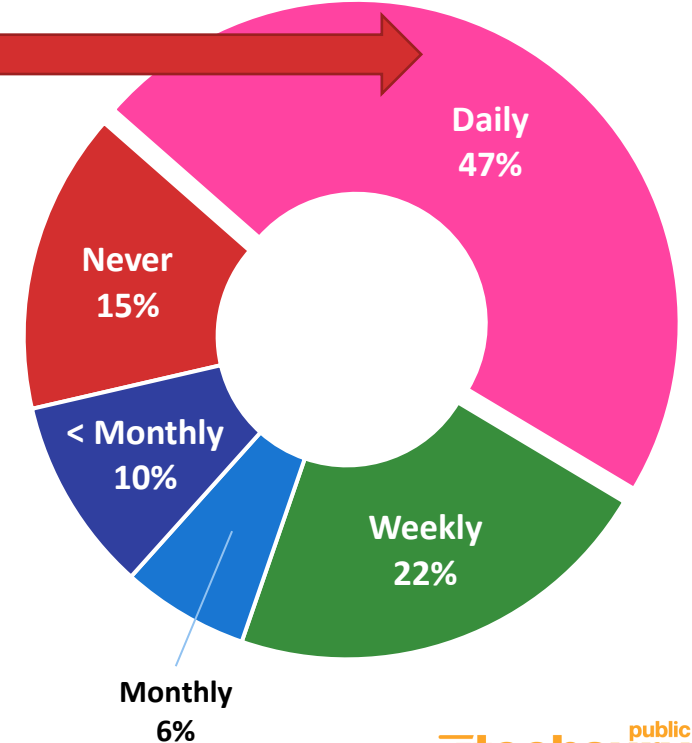
Listen to podcasts



Play online word games



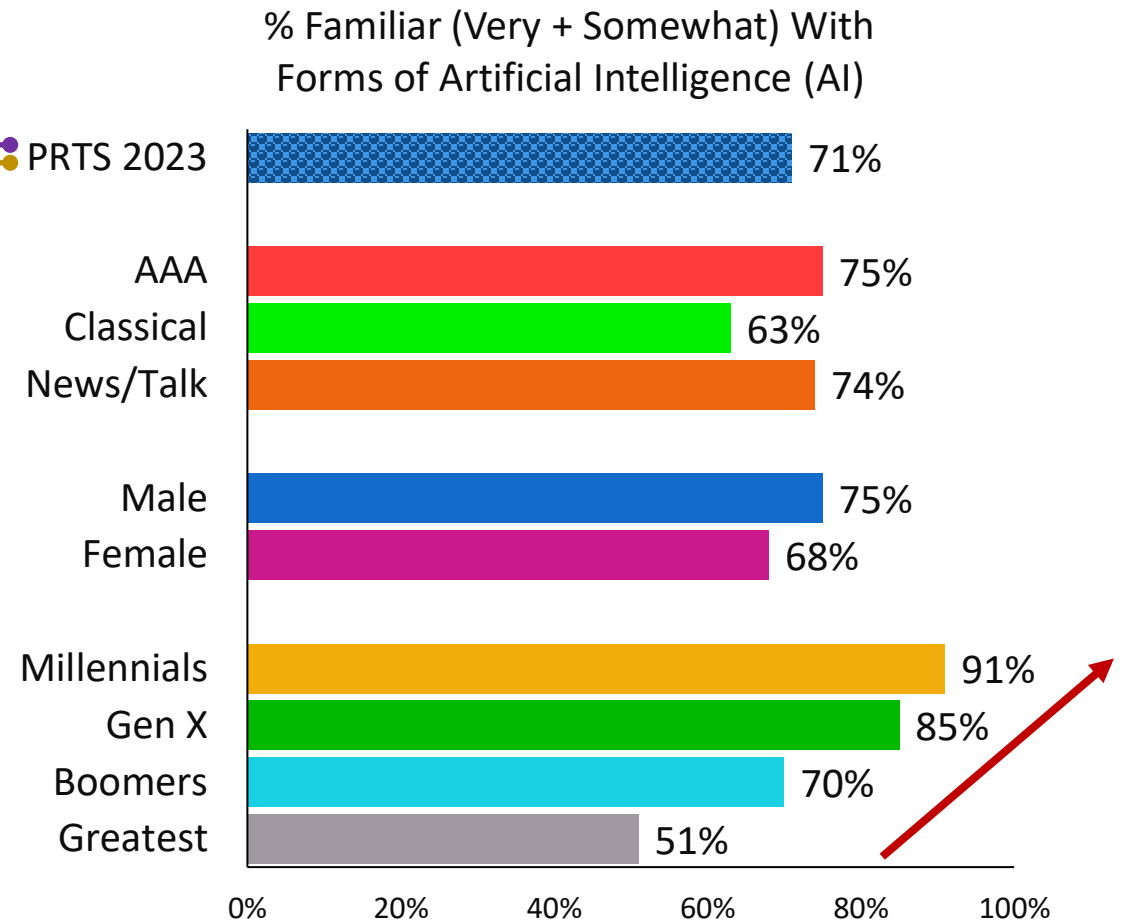
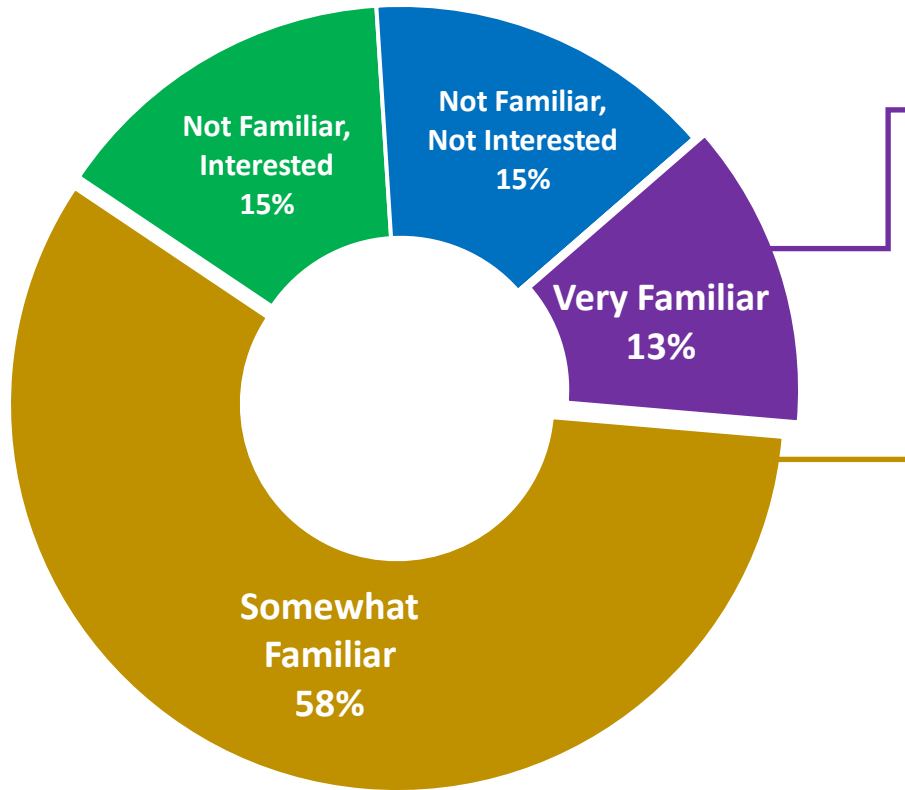
Read local online newsletters





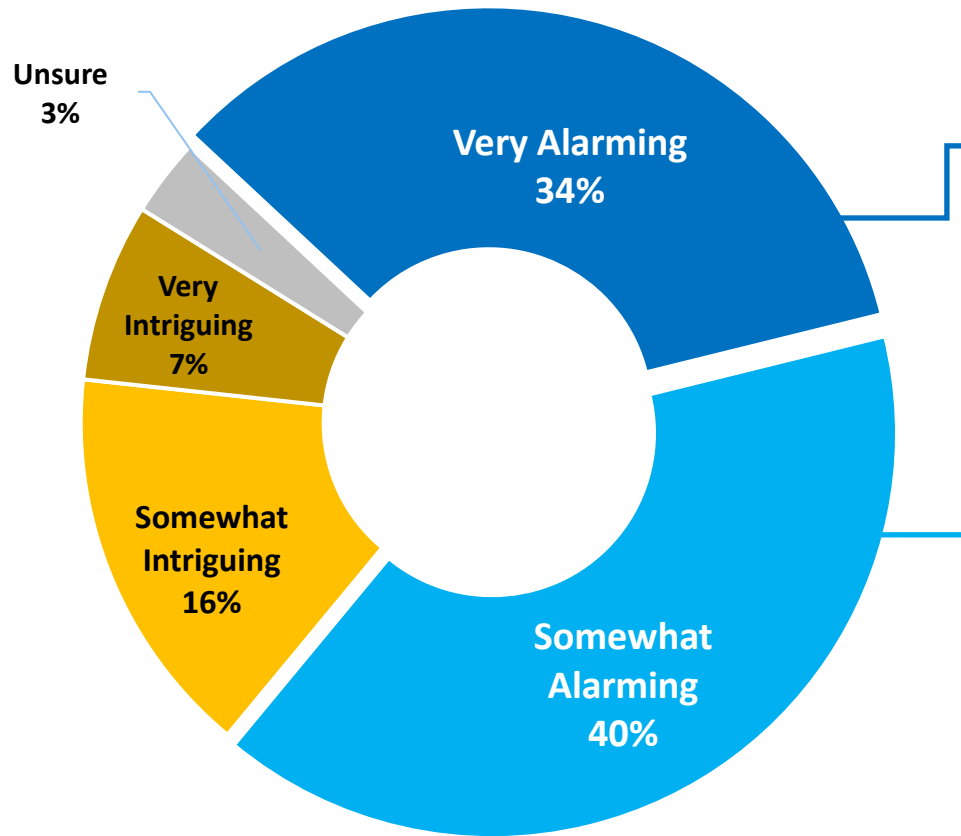
Public Radio core listeners are alarmed about AI technology, especially its potential impact on the election process.

# Seven in Ten Are at Least Somewhat Familiar With Artificial Intelligence, Especially Progressively Younger Listeners

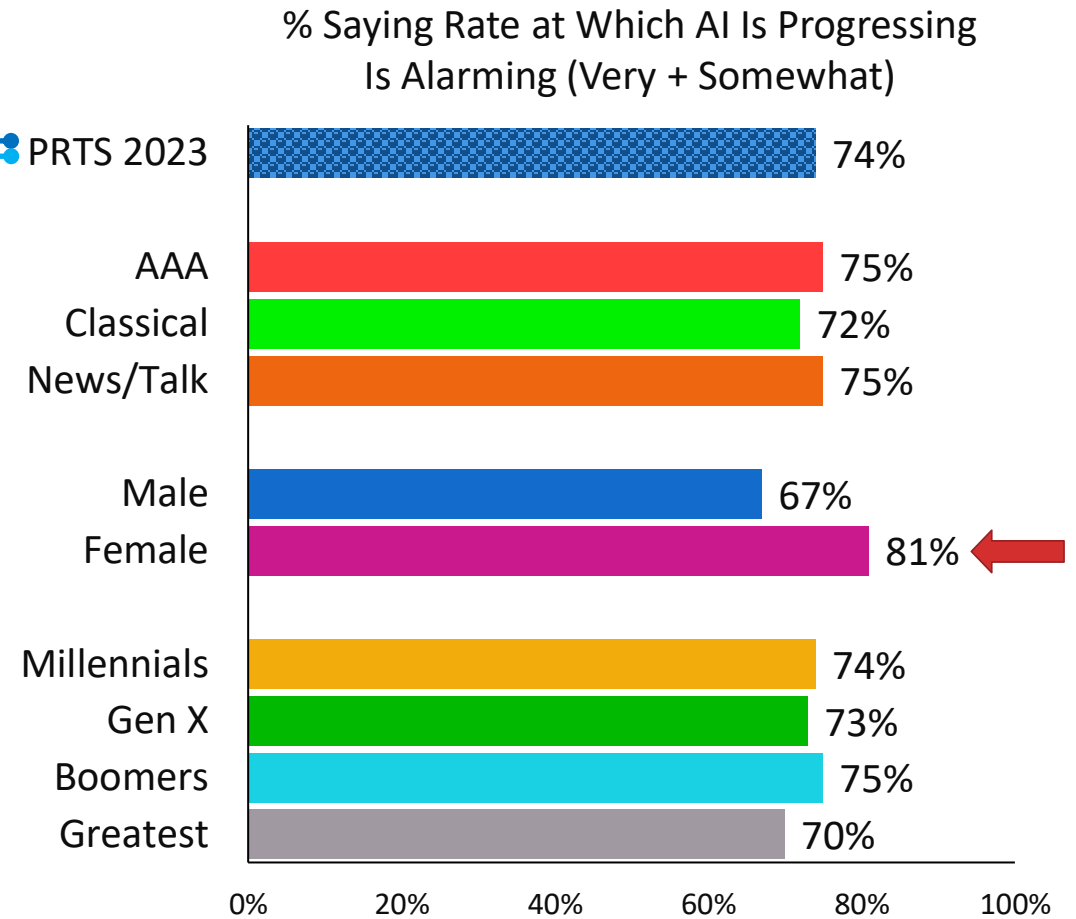


*“AI applications can be used in various forms, including creating realistic images, cloning voices, writing copy, and organizing content. In general, are you familiar with these (and/or other) forms of AI?”*

# There Is a High Level of Alarm Over AI's Rapid Growth, Especially Among Women

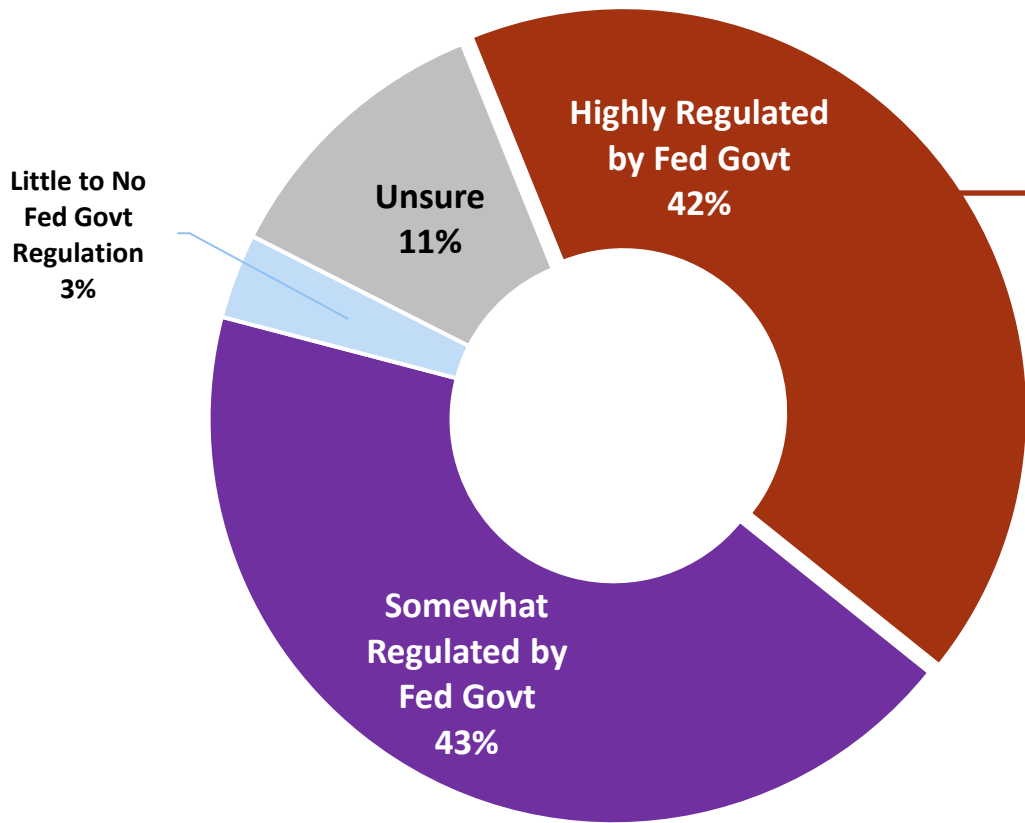


*"Based on what you know about 'AI,' which comes closest to your opinion?  
The rate at which AI is progressing is:"*

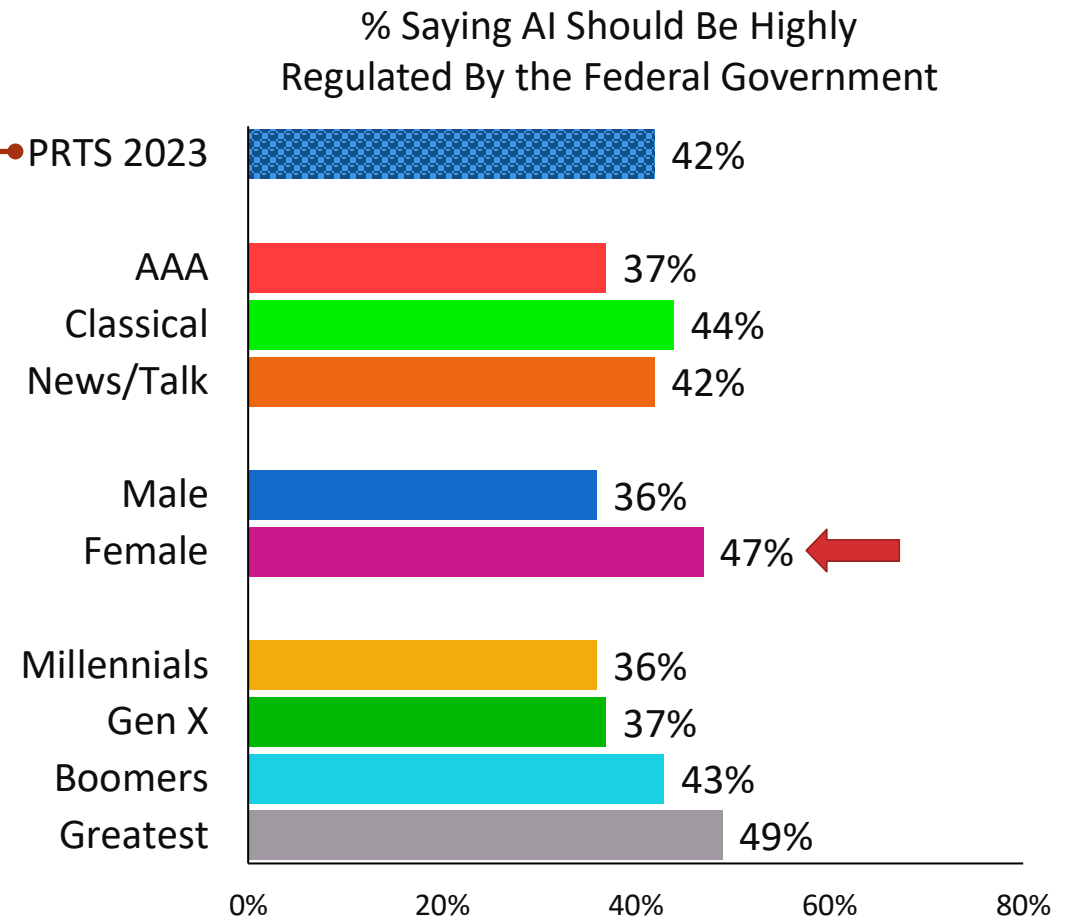




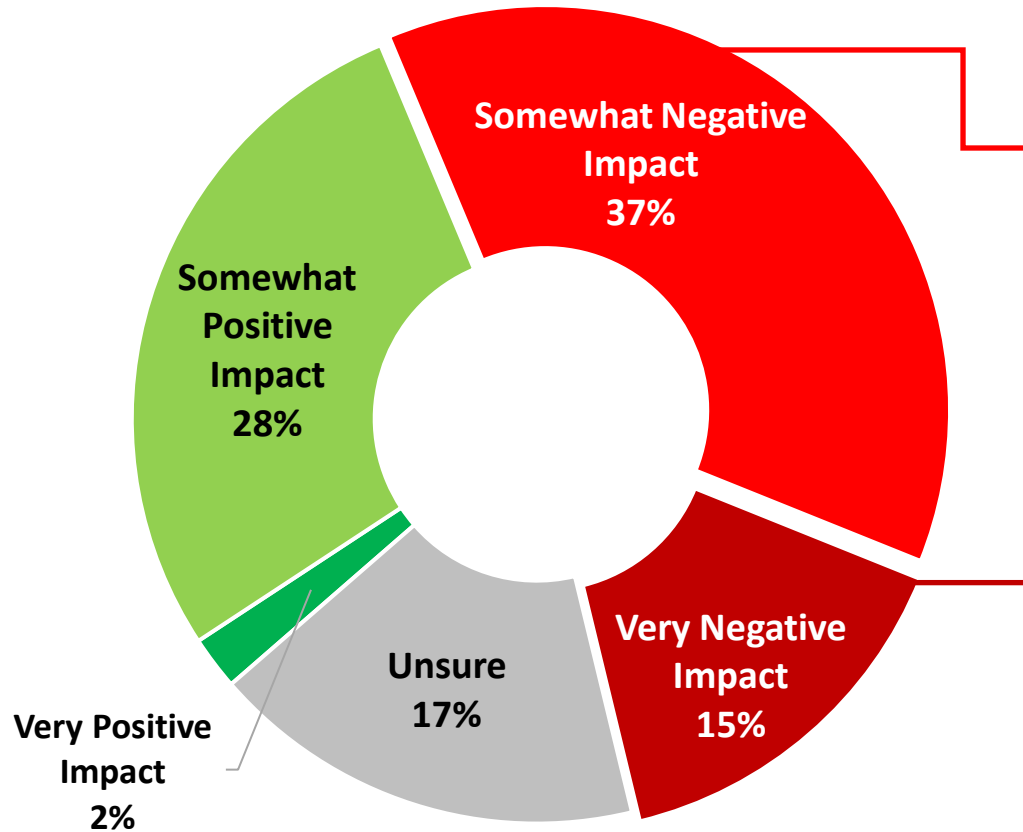
# Most Say the Federal Government Should Regulate AI; Four in Ten Say AI Desire Strong Government Safeguards



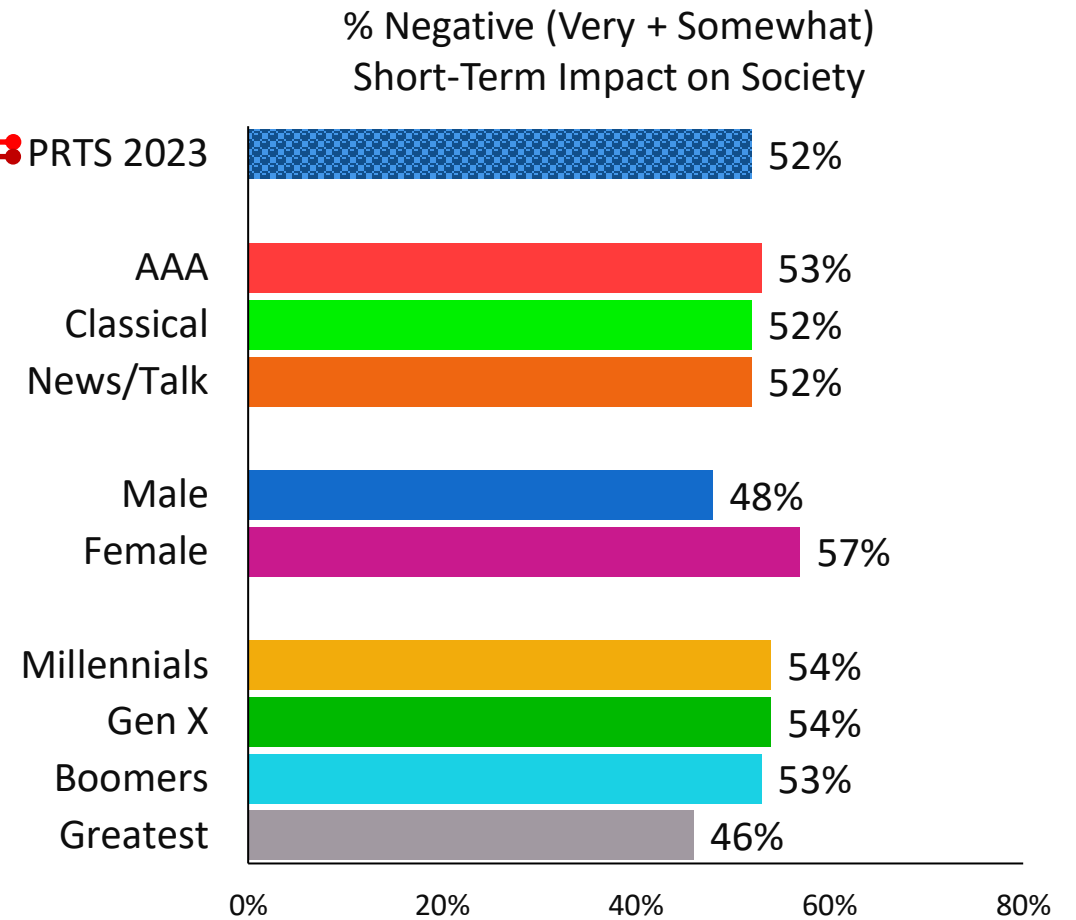
“Based on what you know about ‘AI,’ which comes closest to your opinion?  
AI should mostly be:”



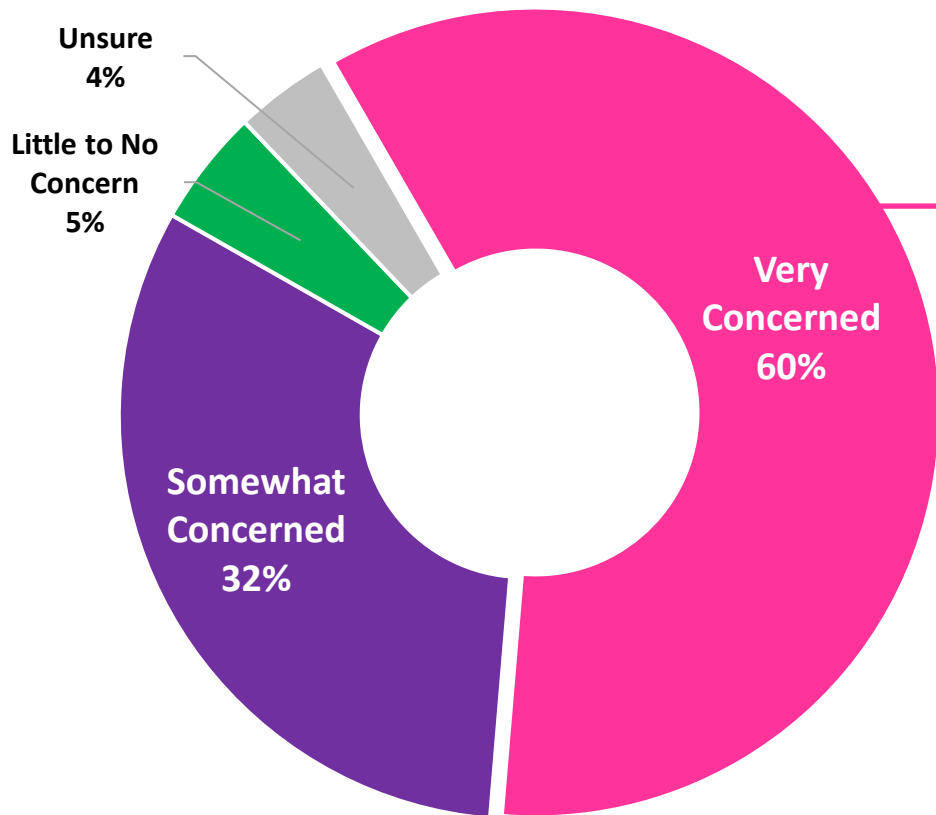
# A Majority Feel AI Will Have a Negative Short-Term Impact on Society



*"Which best represents your opinion about AI (and its impact on society)?  
In the short term (that is, within the next year or two),  
I expect AI will generally have a..."*

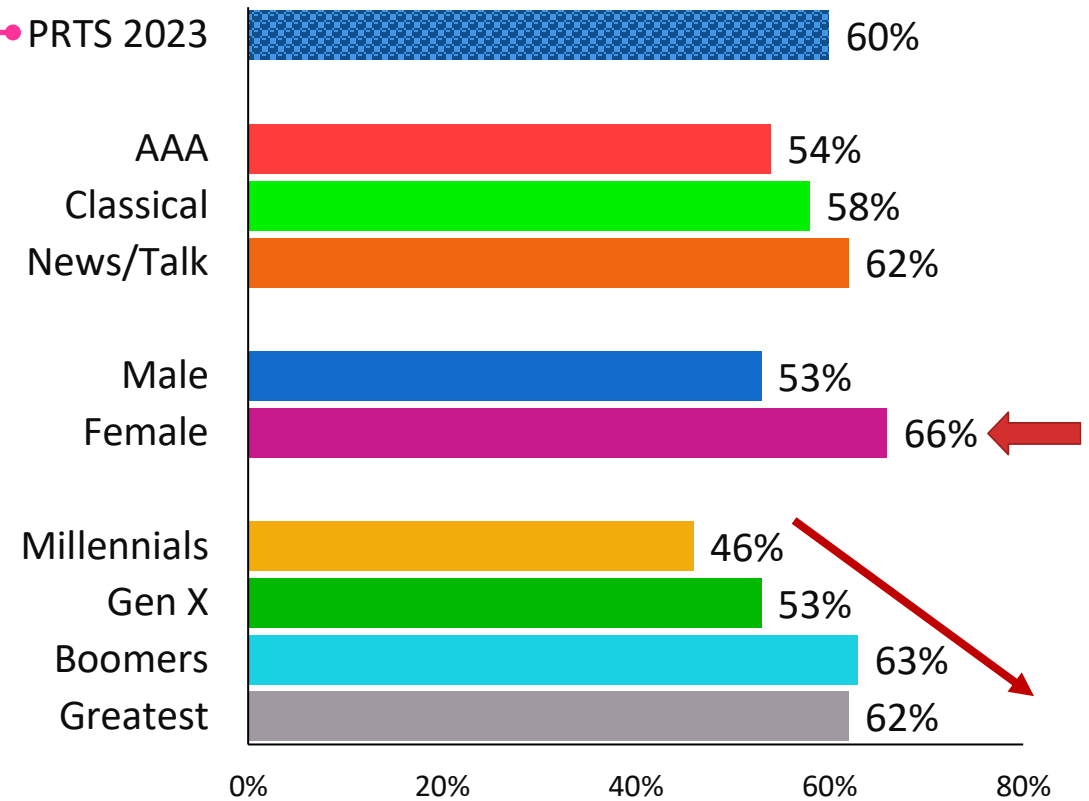


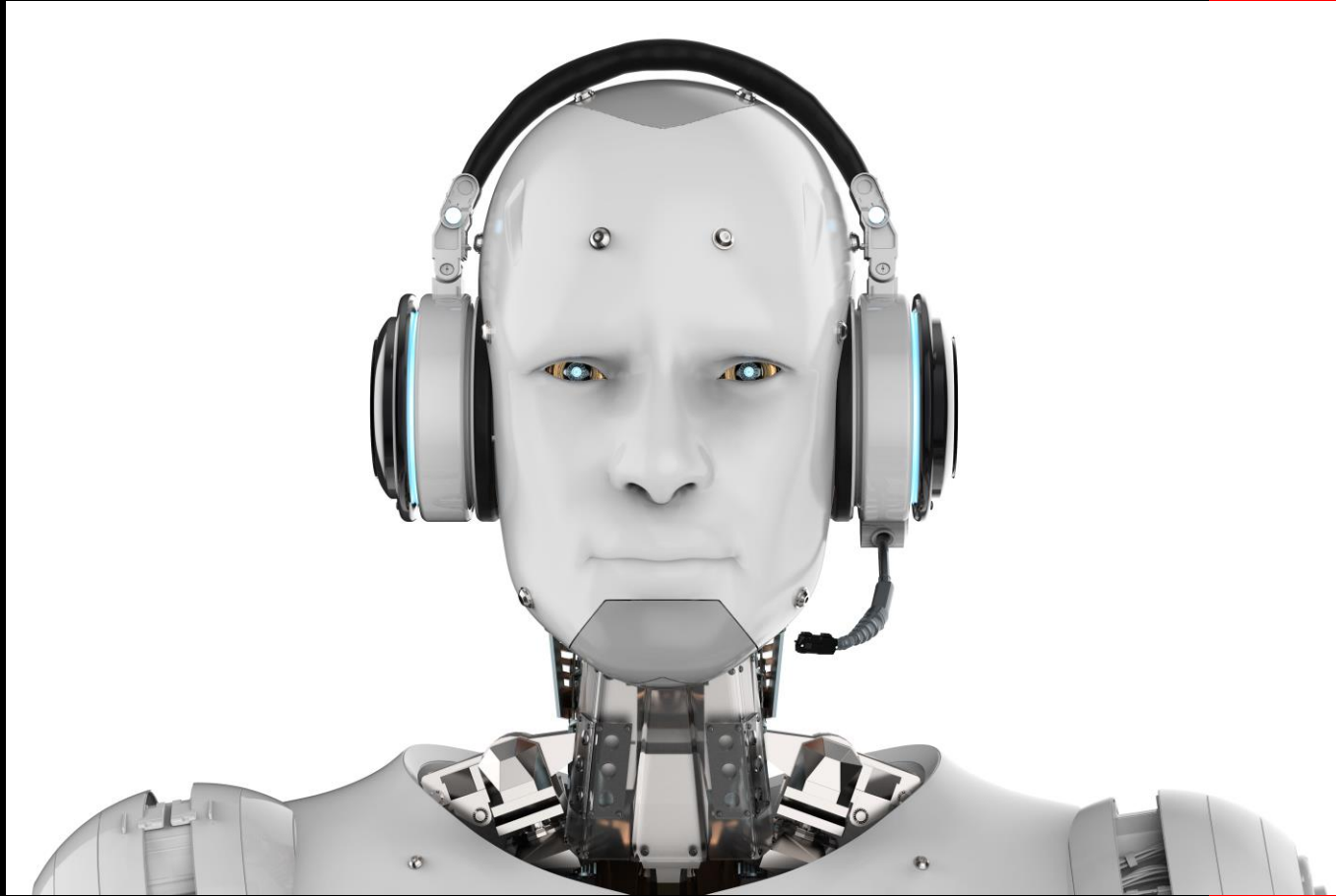
# Most Are Highly Concerned About AI's Potential to Influence 2024 Elections, Especially Women and Older Listeners



*"Which of the following best describes how you feel about AI and its potential to influence upcoming 2024 elections?"*

% Who Are Very Concerned With the Potential of AI to Influence 2024 Elections

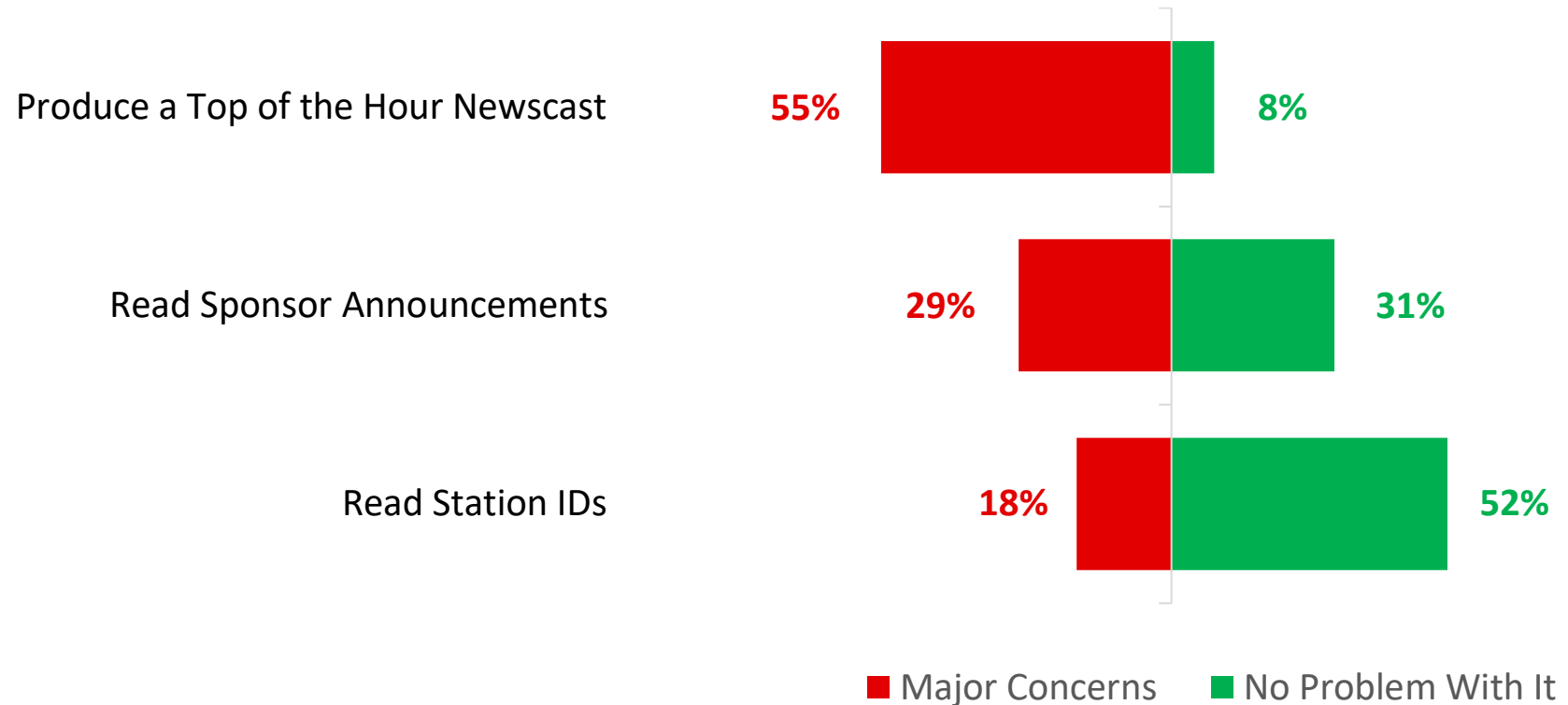




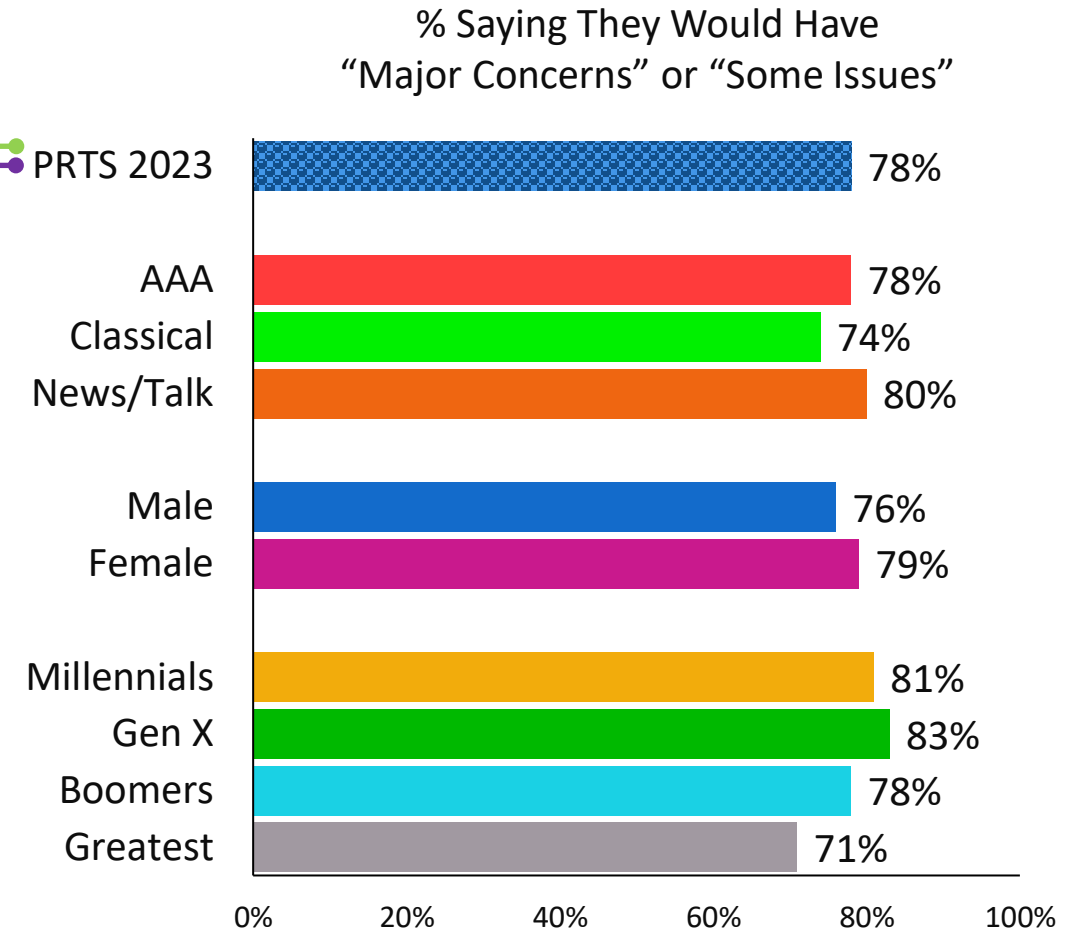
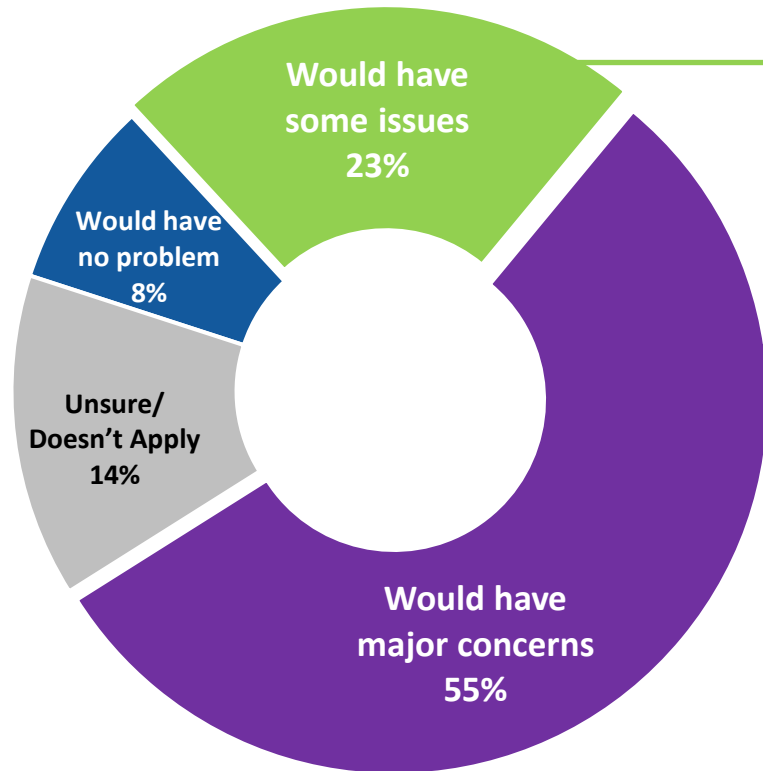
**How can AI  
technology be  
used at Public  
Radio stations  
(or can it)?**

# Of the Three Applications Tested, Using AI Technology to “Voice” Station IDs is the Most Acceptable to Public Radio Fans

*“One of the applications of AI technology is its ability to clone voices – that is, to make artificial voices sound human and/or to copy a familiar personality’s voice. Some stations are thinking about how they might use AI in the future. If a station you listen to used AI voice technology to **(item)**, which of the following best describes your opinion?”*



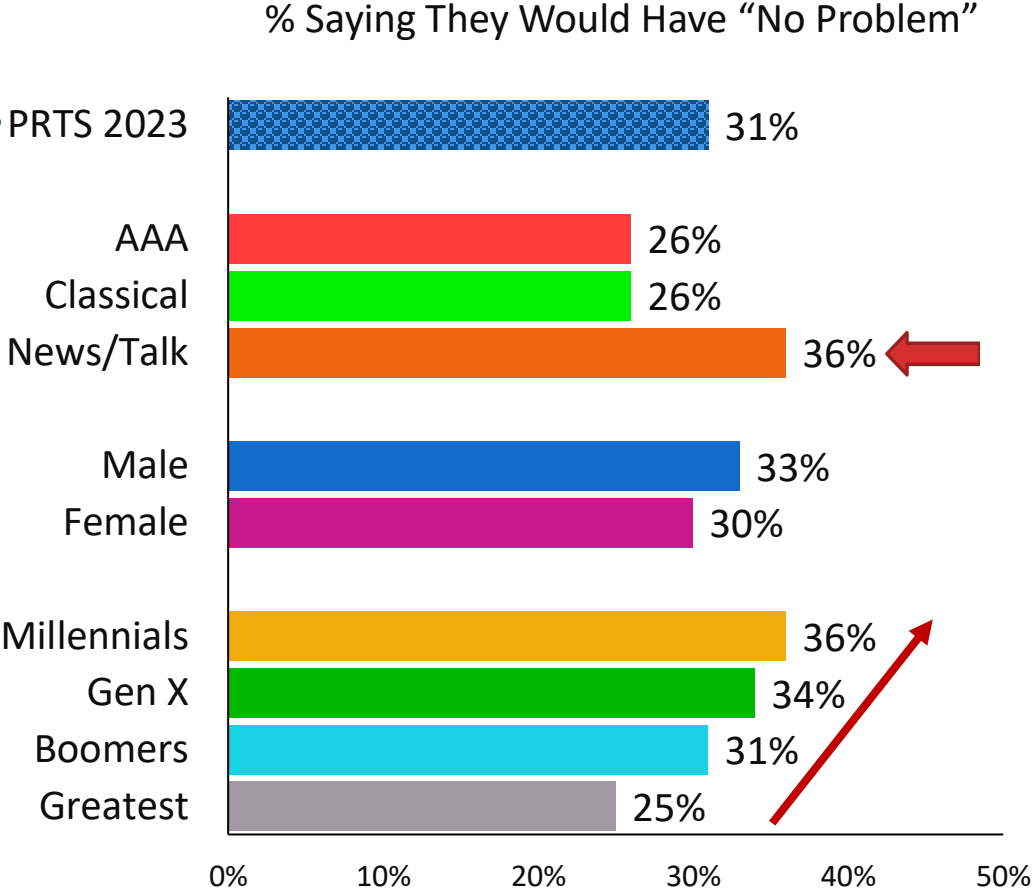
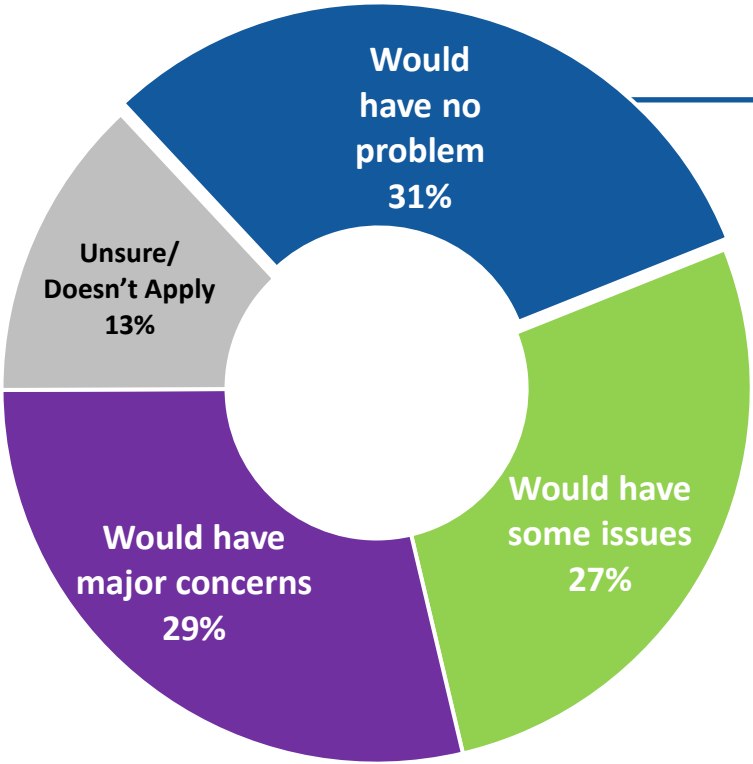
# A Solid Majority Express Major Concerns Over the Use of AI Voice Technology to Produce a Top of the Hour Newscast



*"One of the applications of AI technology is its ability to clone voices – that is, to make artificial voices sound human and/or to copy a familiar personality's voice."*

*Some stations are thinking about how they might use AI in the future. If a station you listen to used AI voice technology to produce a TOP OF THE HOUR NEWSCAST, which of the following best describes your opinion?"*

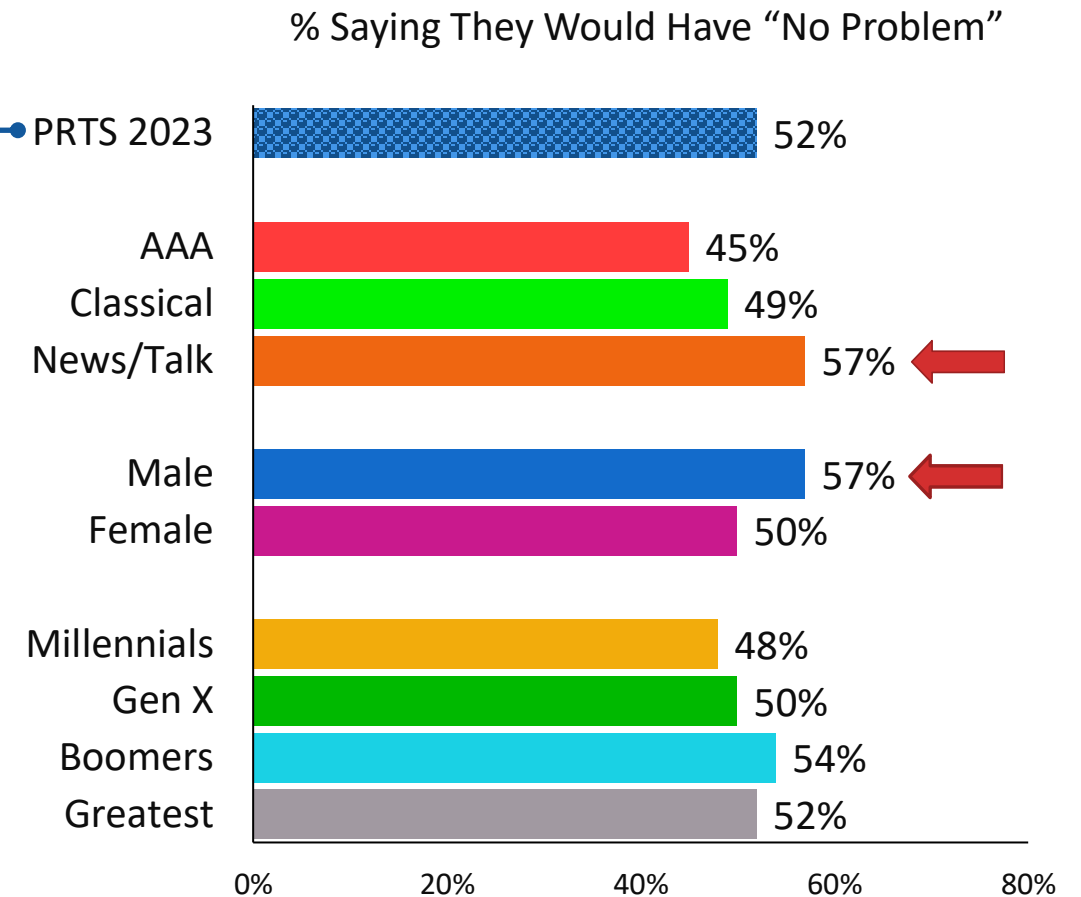
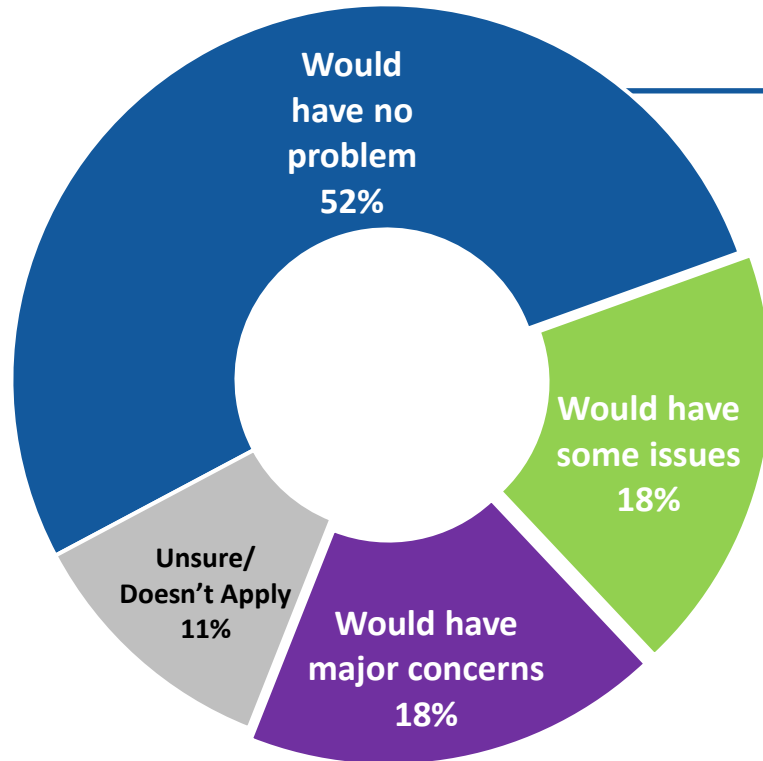
# Reactions Are Mixed About Using AI Voice to Read Sponsor Ads, But Younger Listeners and News/Talk Fans Are Most Open to It



*"One of the applications of AI technology is its ability to clone voices – that is, to make artificial voices sound human and/or to copy a familiar personality's voice."*

*Some stations are thinking about how they might use AI in the future. If a station you listen to used AI voice technology to READ SPONSOR ANNOUNCEMENTS, which of the following best describes your opinion?"*

# A Majority Have No Problem With Stations Using AI Voice Technology to Read Station IDs



*"One of the applications of AI technology is its ability to clone voices – that is, to make artificial voices sound human and/or to copy a familiar personality's voice."*

*Some stations are thinking about how they might use AI in the future. If a station you listen to used AI voice technology to READ STATION IDs (call letters/dial position), which of the following best describes your opinion?"*

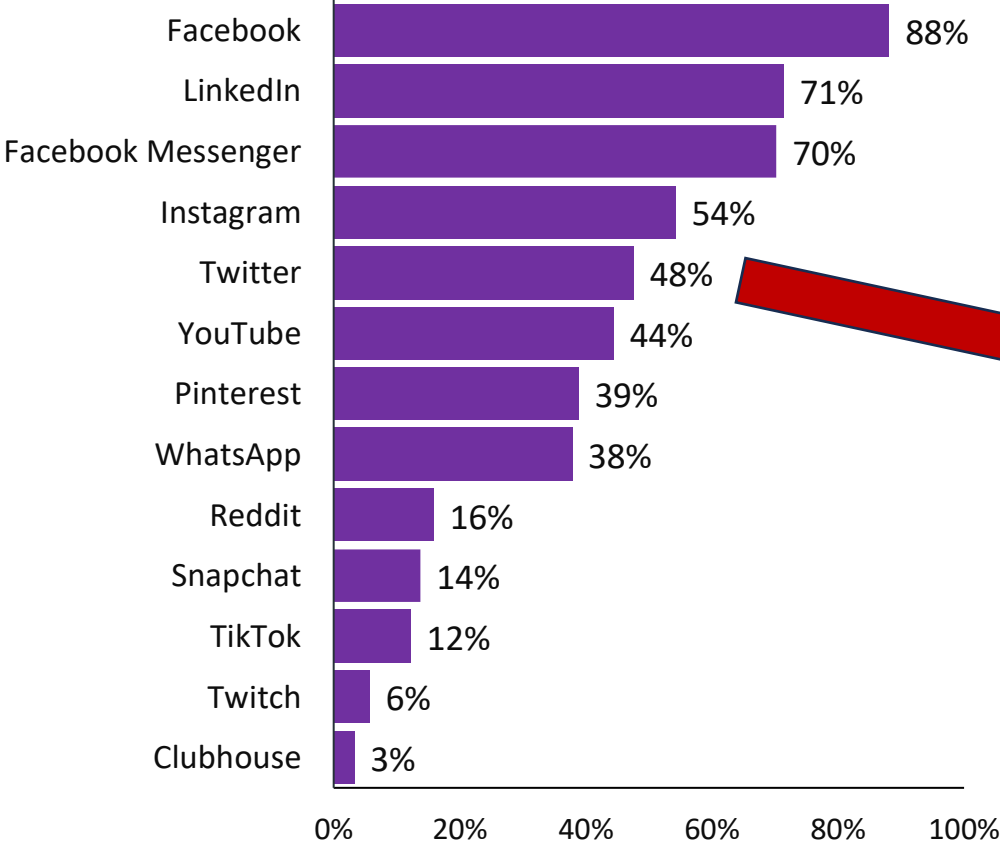




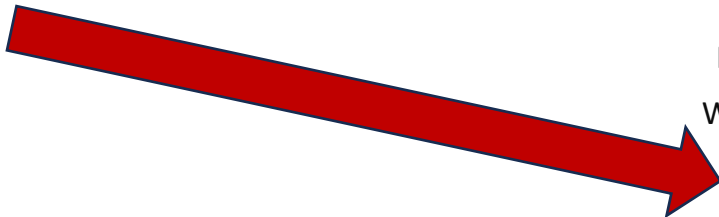
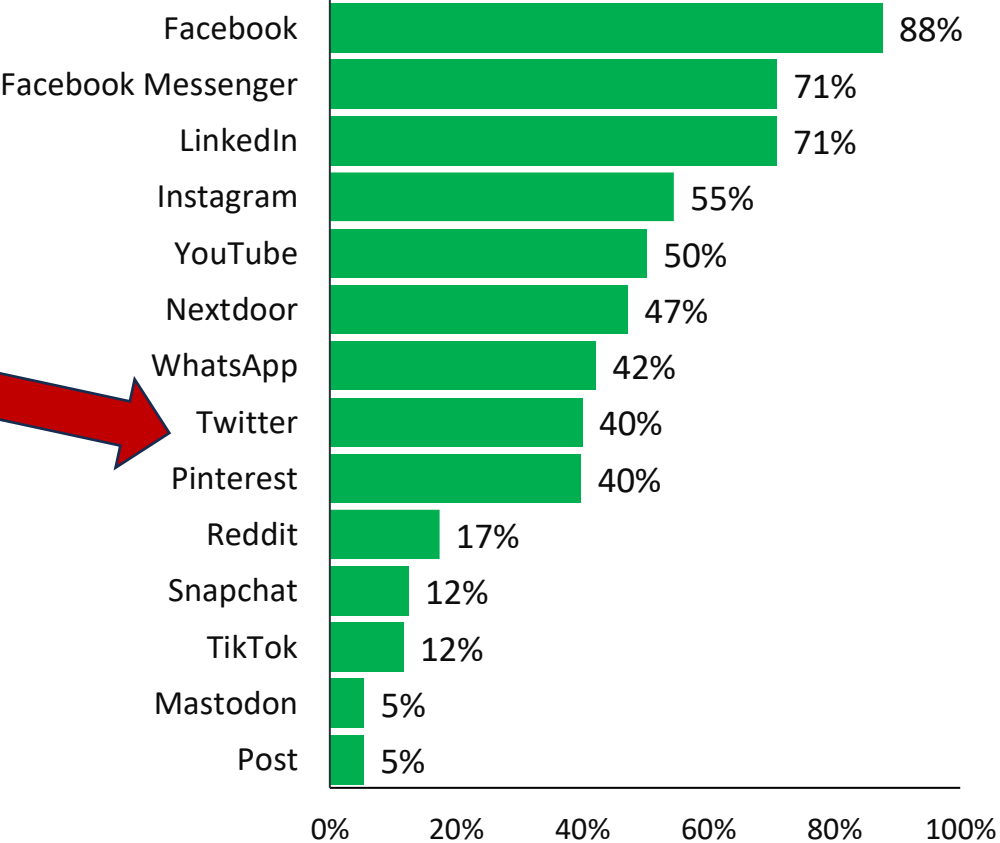
The new management regime under Elon Musk is creating much turbulence among Public Radio's Twitter (X) users.

# Most Social Platforms Are Stable. YouTube Is Showing Nice Gains While Twitter Is Experiencing Speed Bumps

PRTS 2022



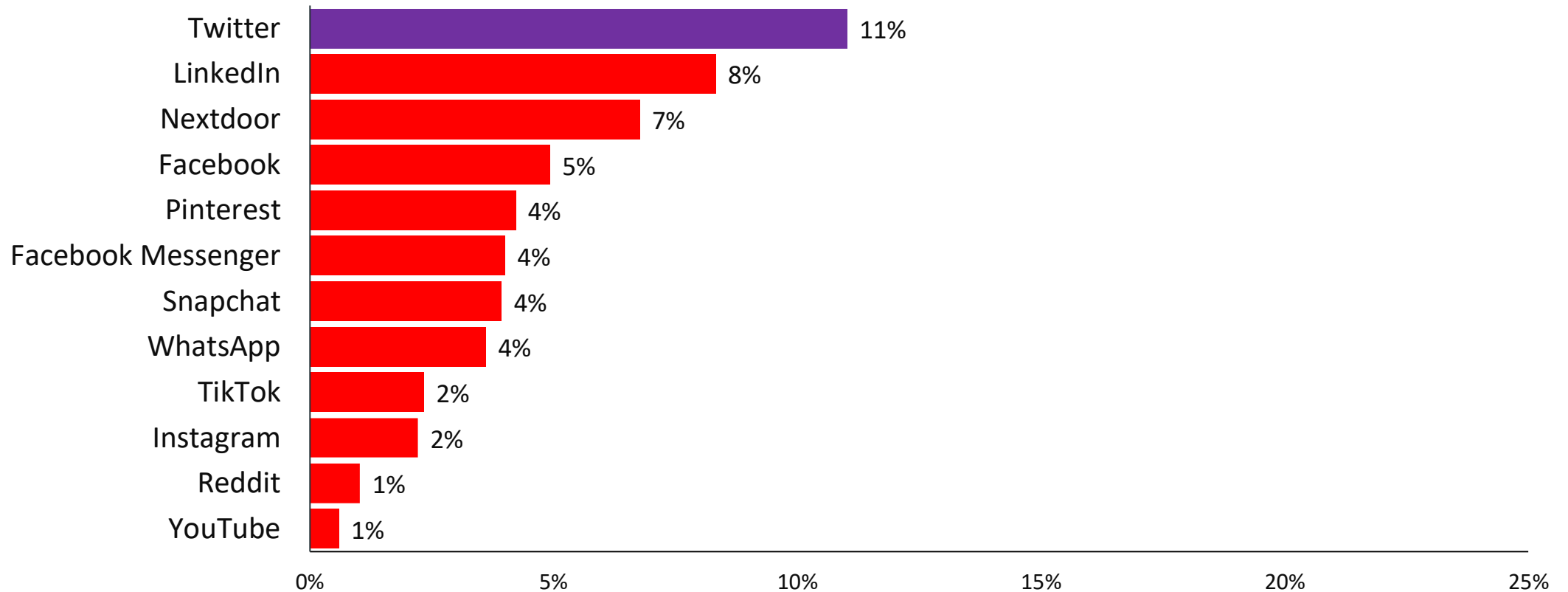
PRTS 2023



Among those with any social media profile, % who have a profile on (platform)

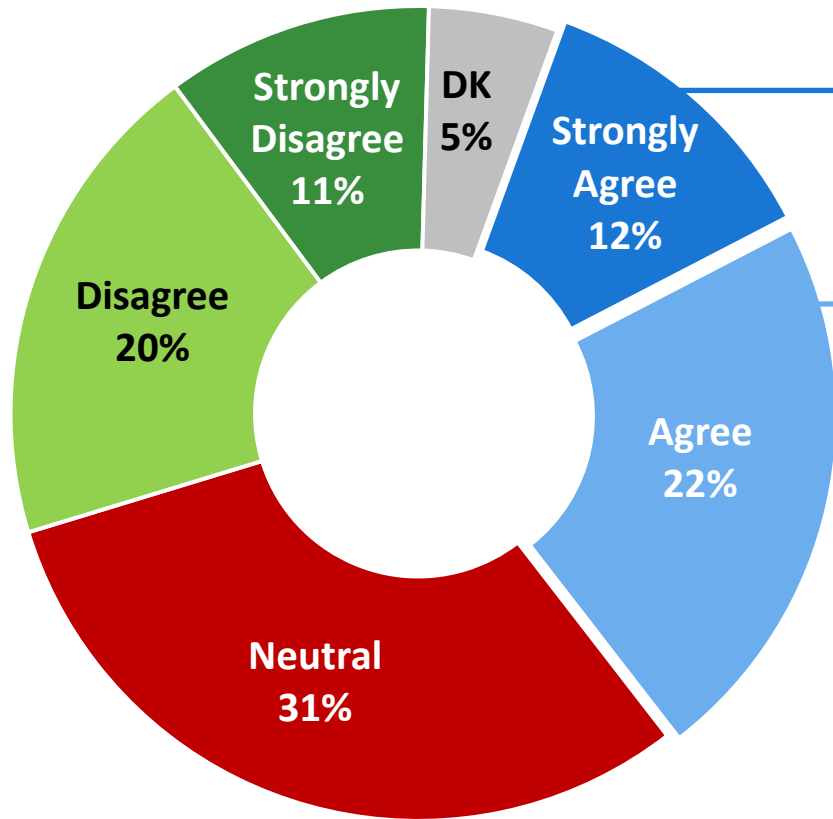
# More Social Media Users Have Left Twitter (X) Than Any Other Platform

% Who Used to Have a Profile on (Platform) But Have Deleted It



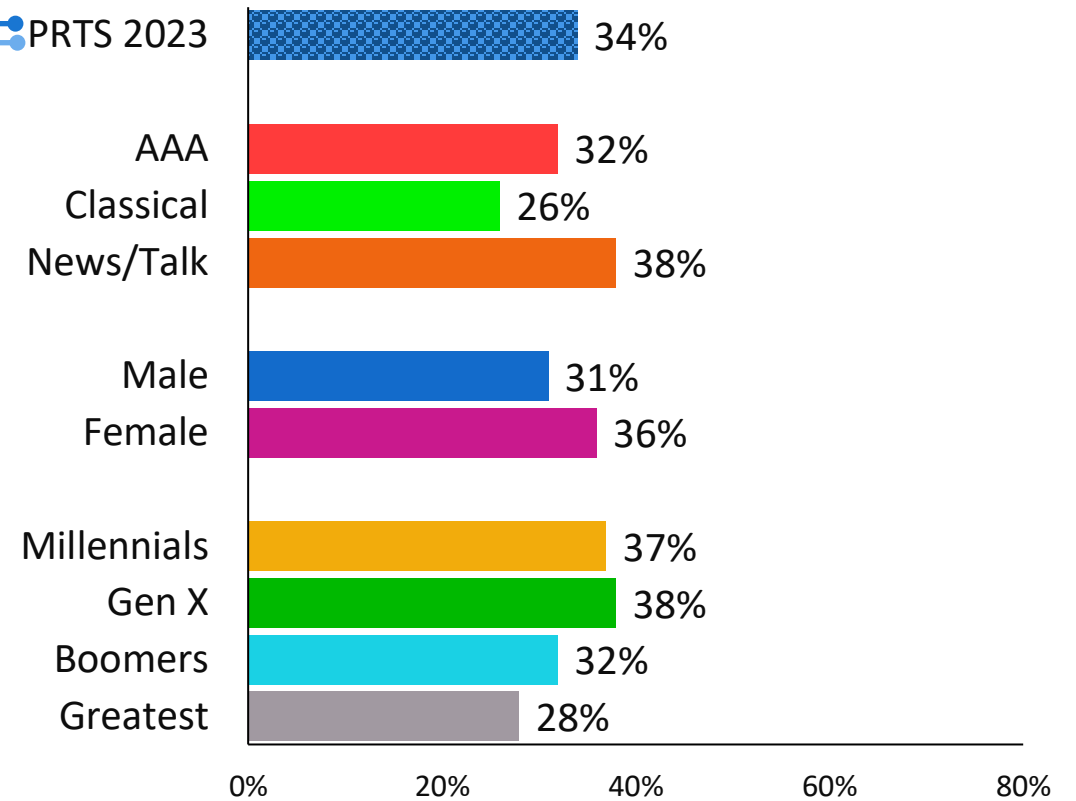
Among those with any social media profile

# One in Three Says They Are Strongly Considering Deleting Their Twitter Profile

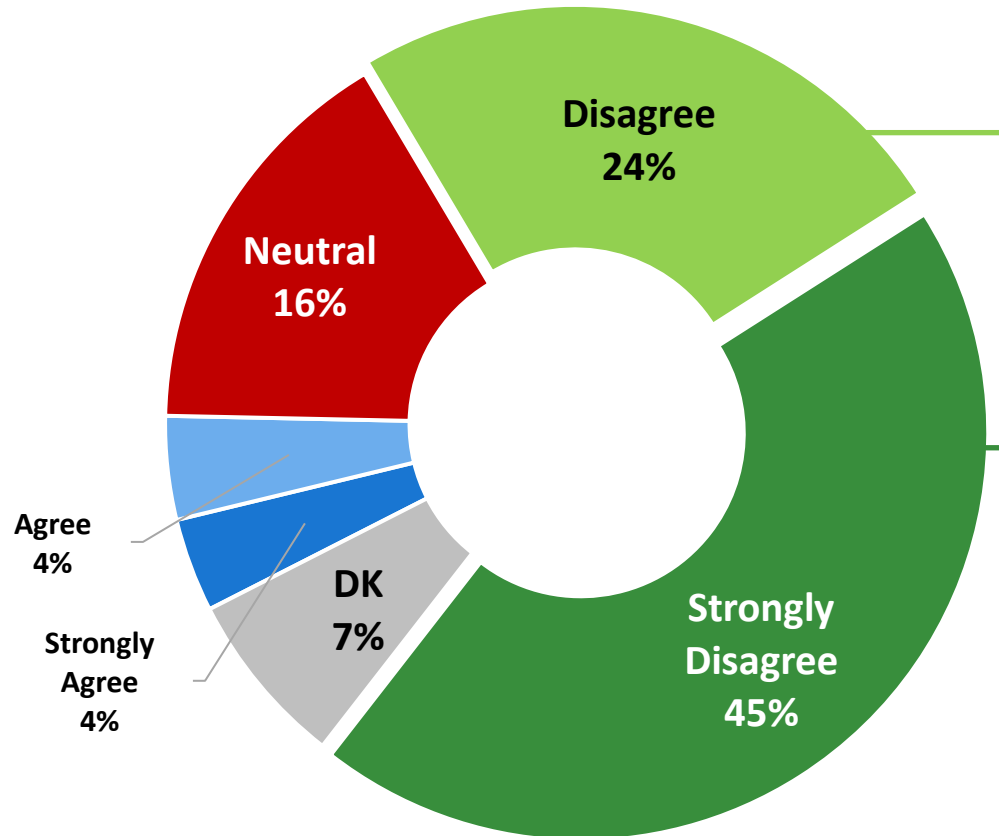


*"I'm strongly considering deleting my Twitter profile"*

% Agreement (Strongly Agree + Agree)

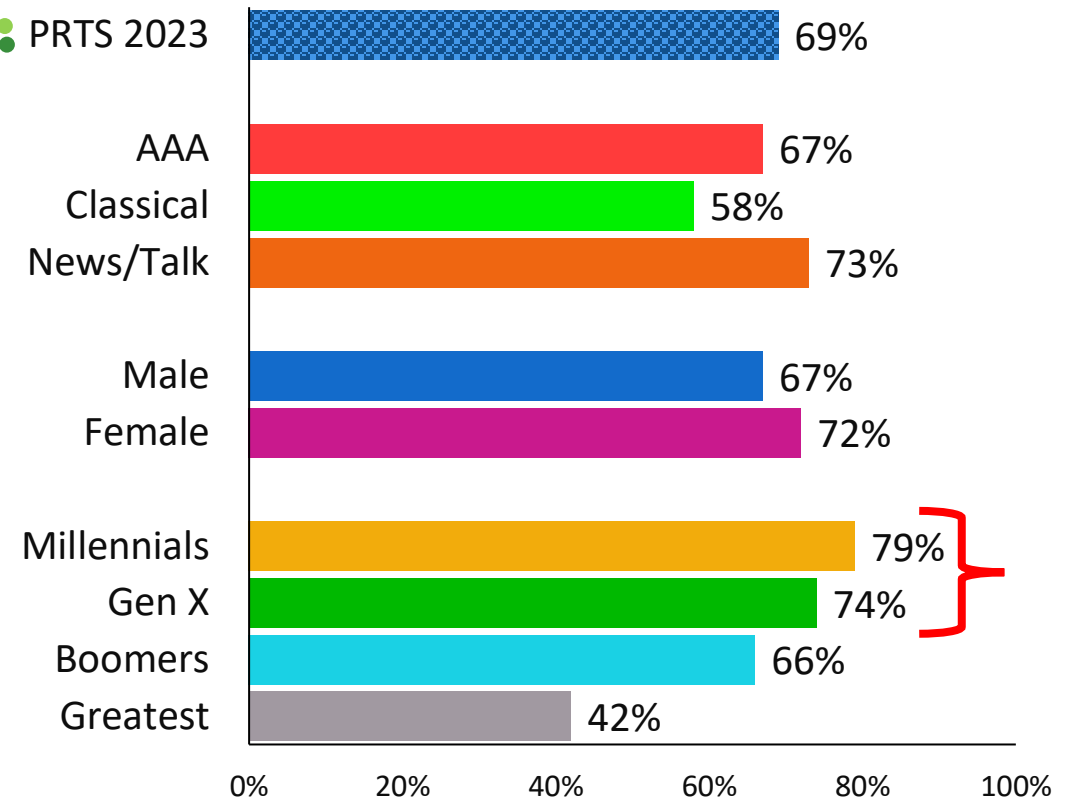


# Younger Generations Are the Most “Down” on Twitter

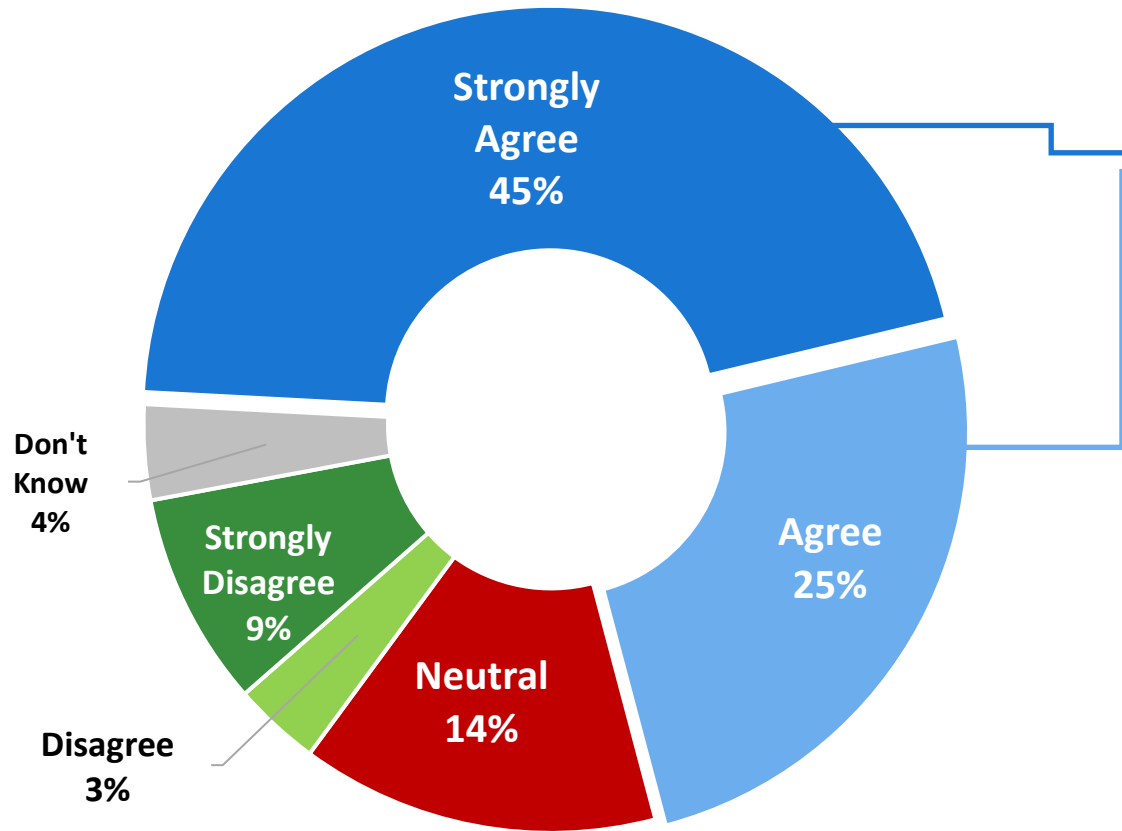


*“Twitter is as good now as it has ever been”*

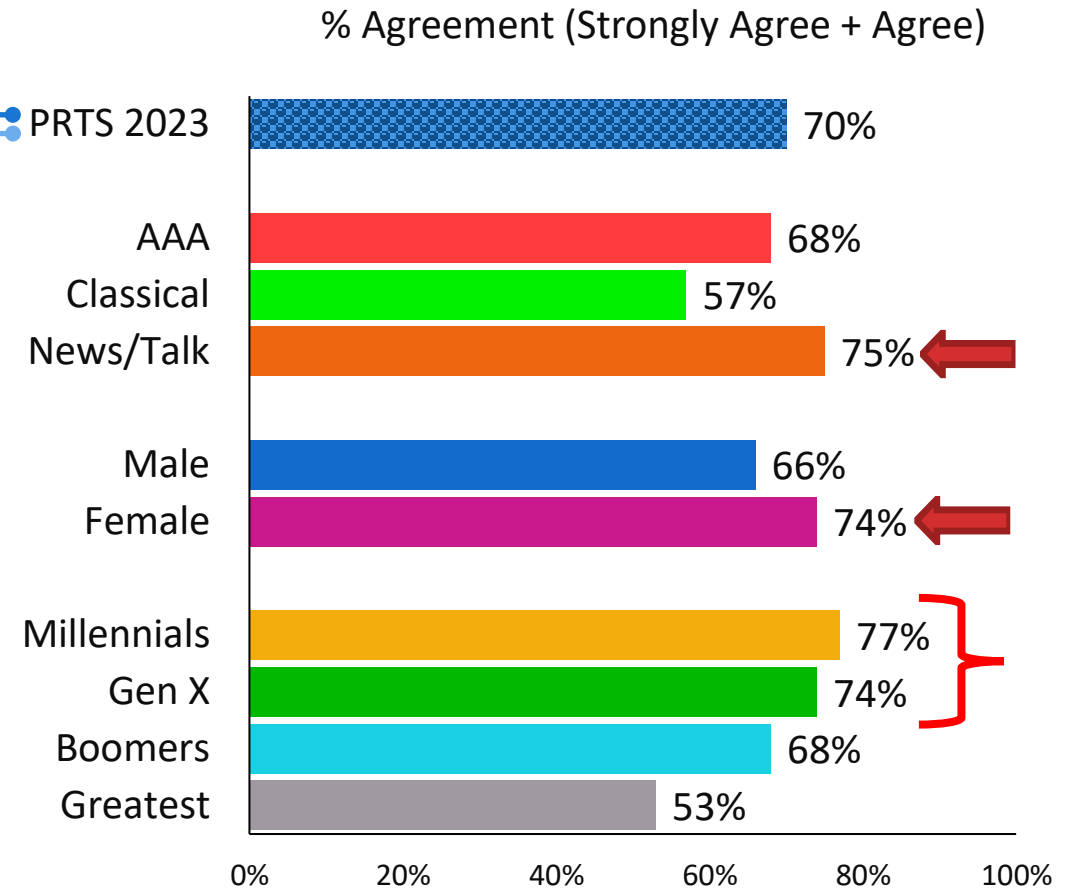
% Disagreement (Strongly Disagree + Disagree)



# Women, News/Talk Fans, and Younger Twitter Users Are Most Unhappy With Elon Musk's Ownership

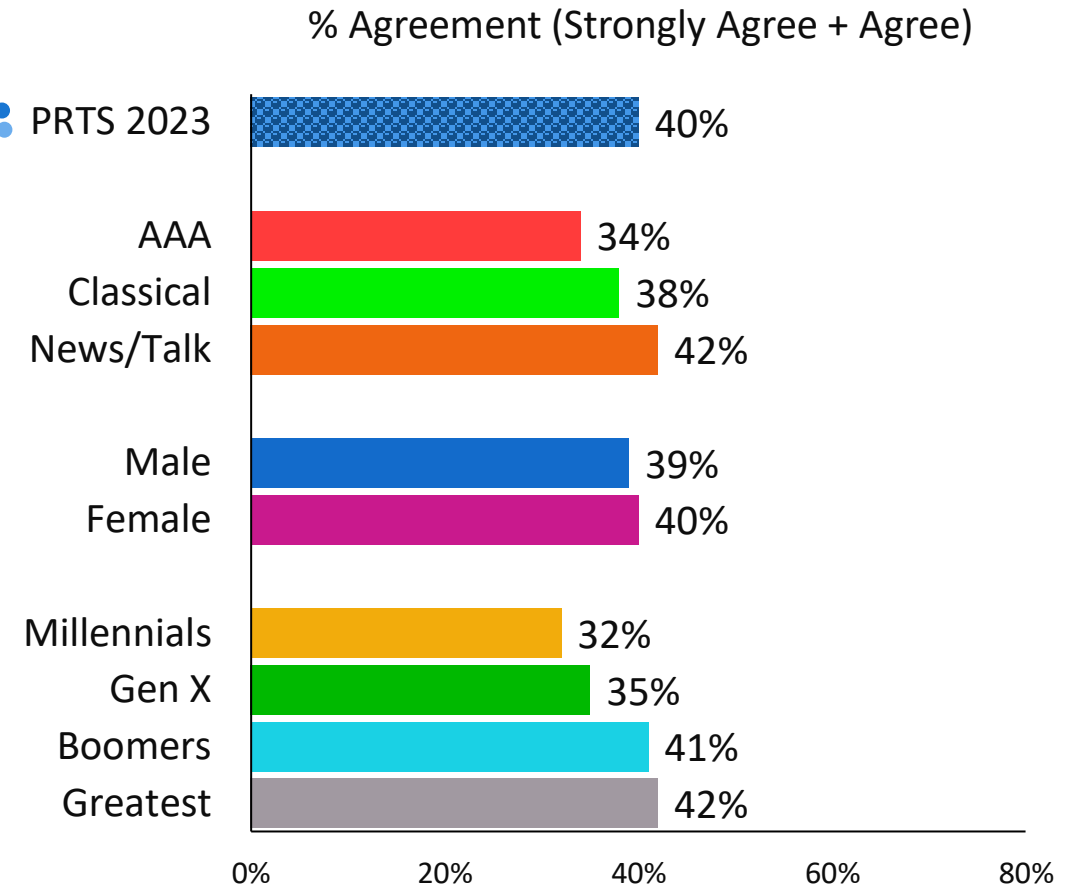
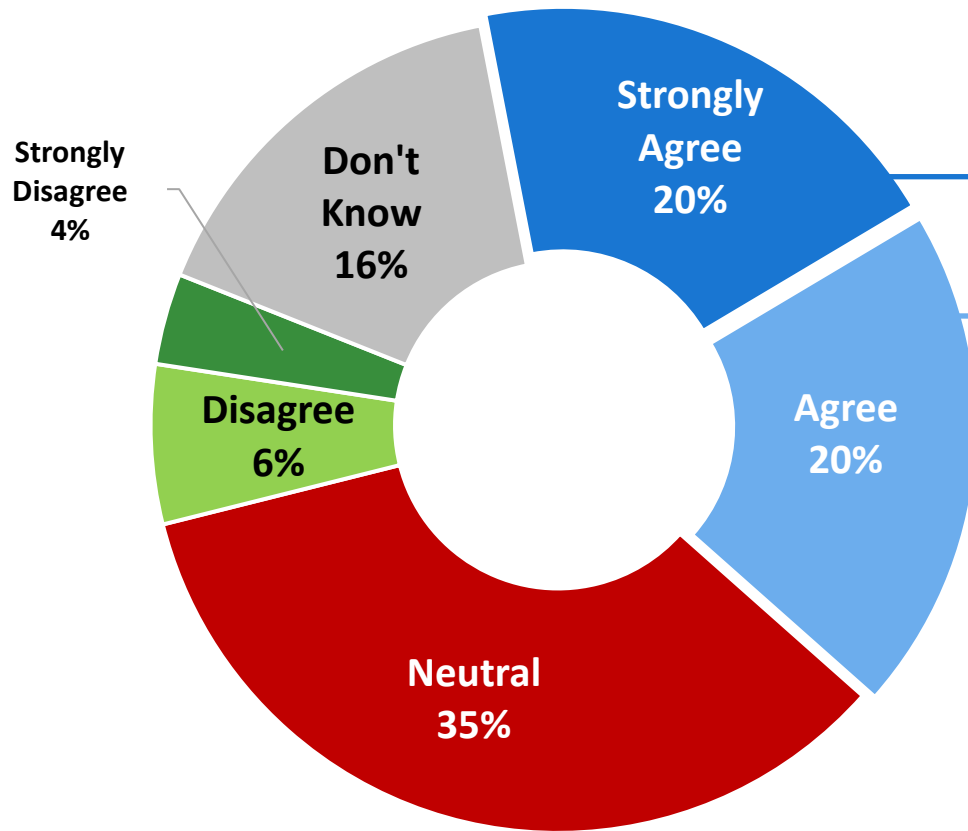


*"I'm unhappy with Twitter since Elon Musk bought the company"*



Among Twitter users

# There Is Support for Public Radio No Longer Being Active on Twitter Due to Recent Controversies



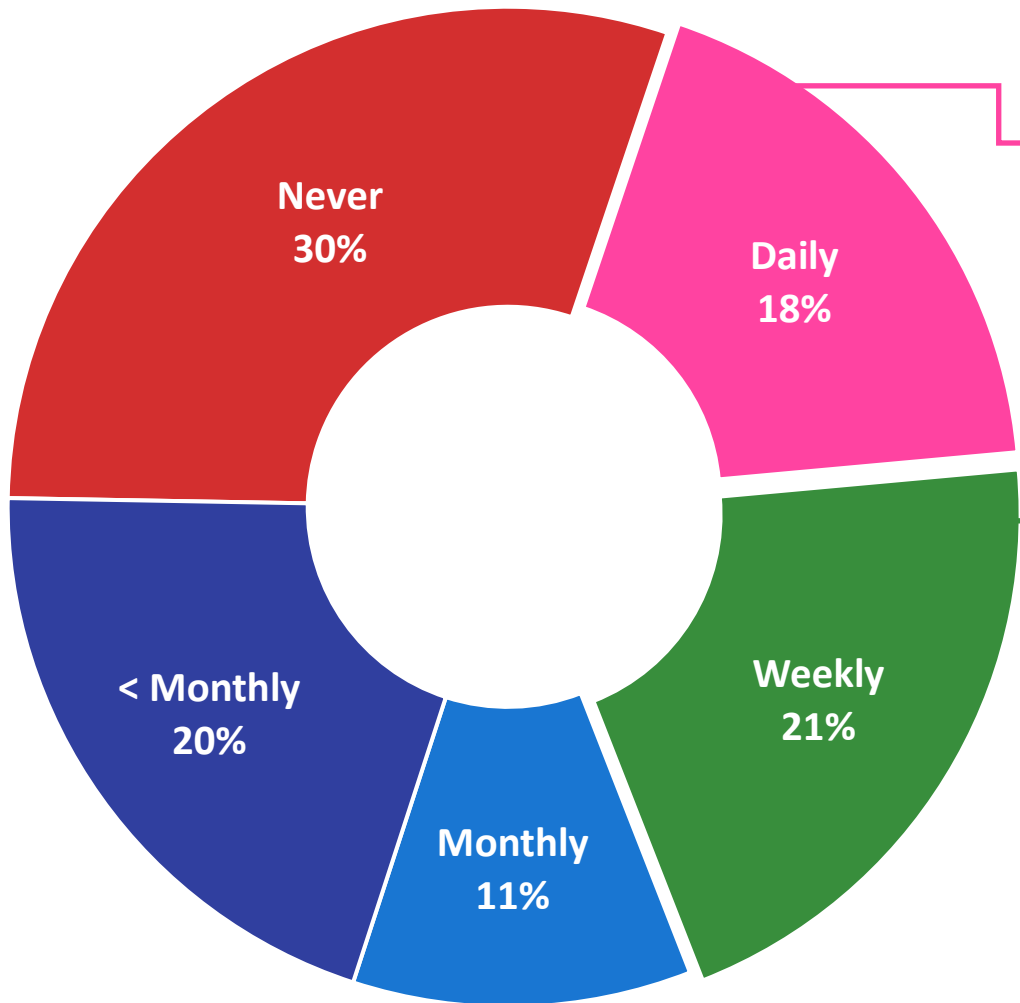
*“Given the recent controversy, I would prefer public radio stations and networks no longer be active on Twitter”*



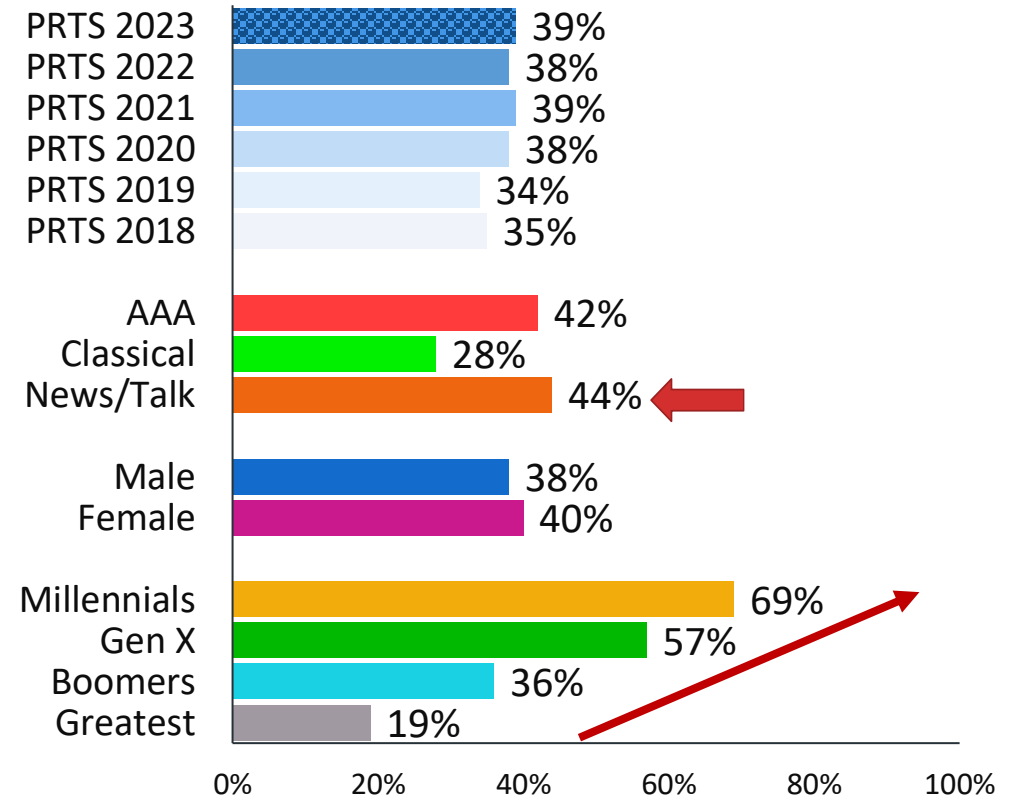
Among core  
Public Radio  
listeners,  
usage &  
momentum of  
podcasts IS  
slowing.



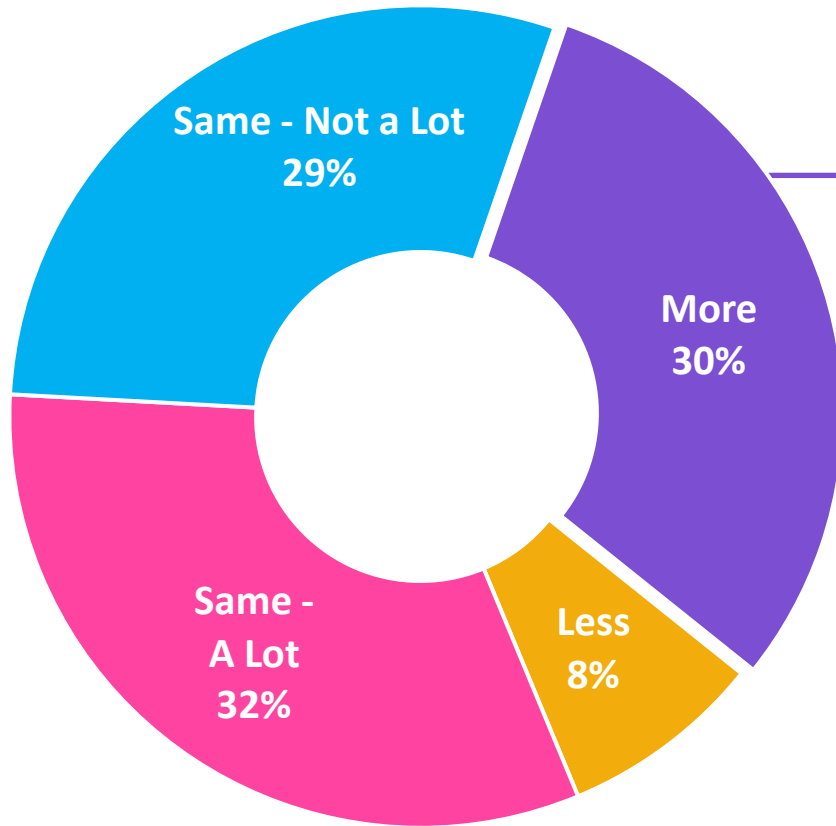
# Podcasts Reach About Four in Ten Weekly, and Is Most Popular Among Millennials, Gen Xers and News/Talk Fans



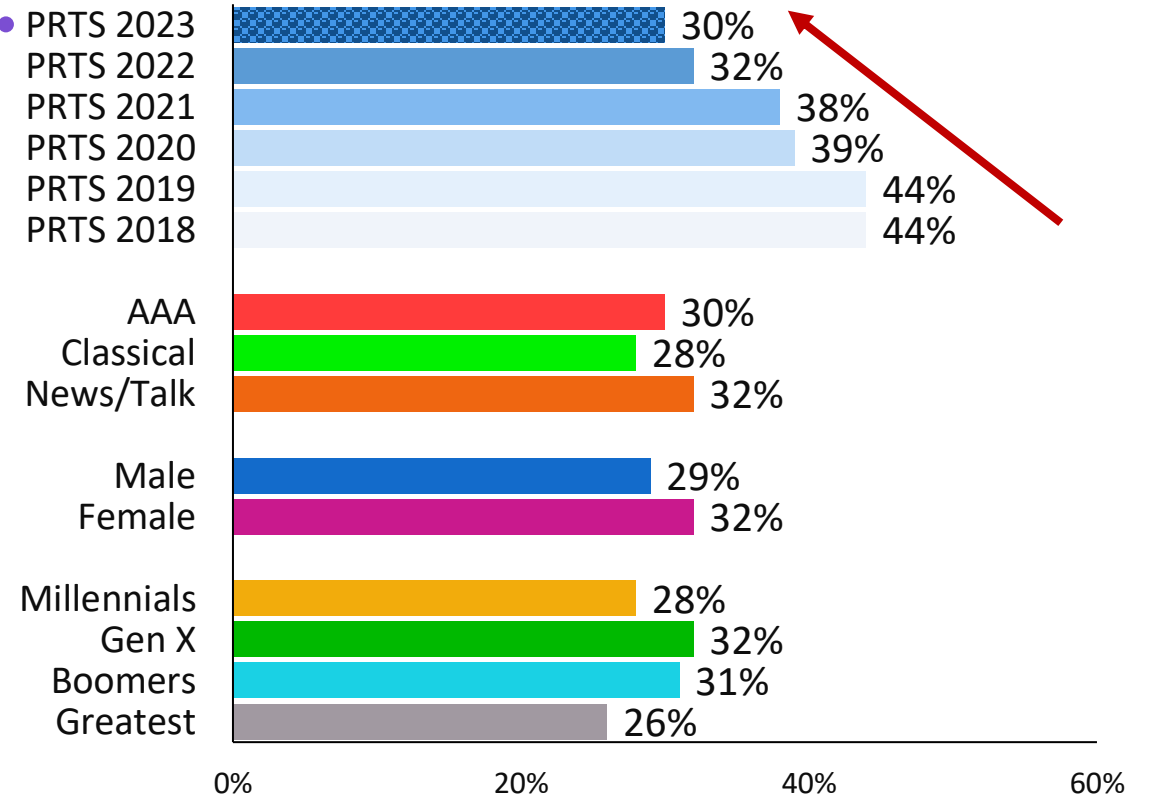
% Who Listen to Podcasts/On-Demand Audio Weekly or More



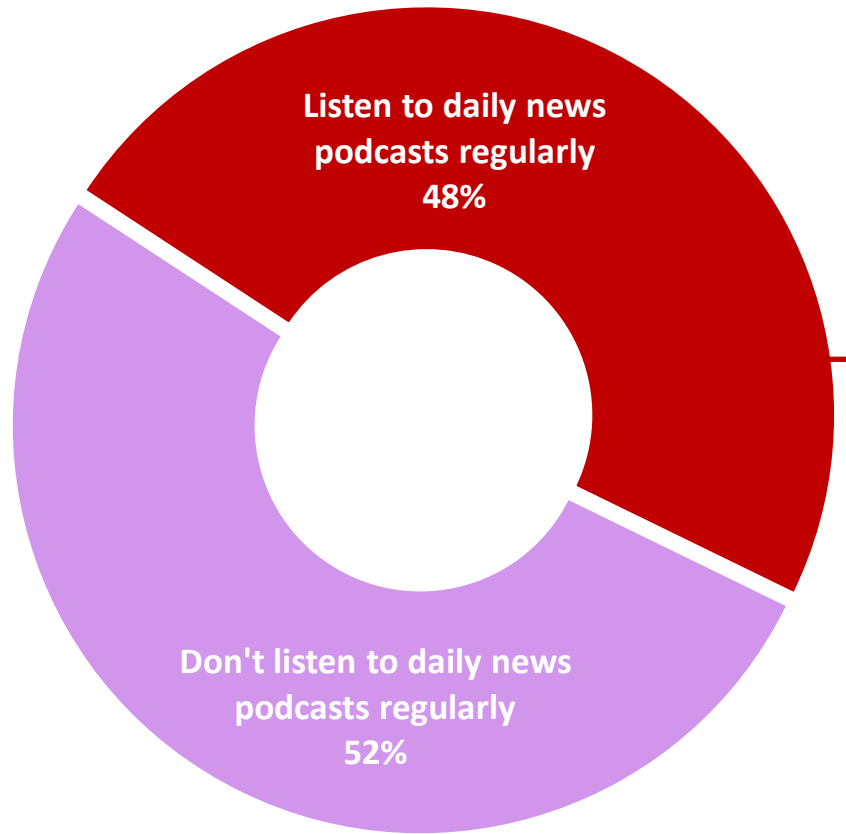
# Podcast Momentum Continues to Cool



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

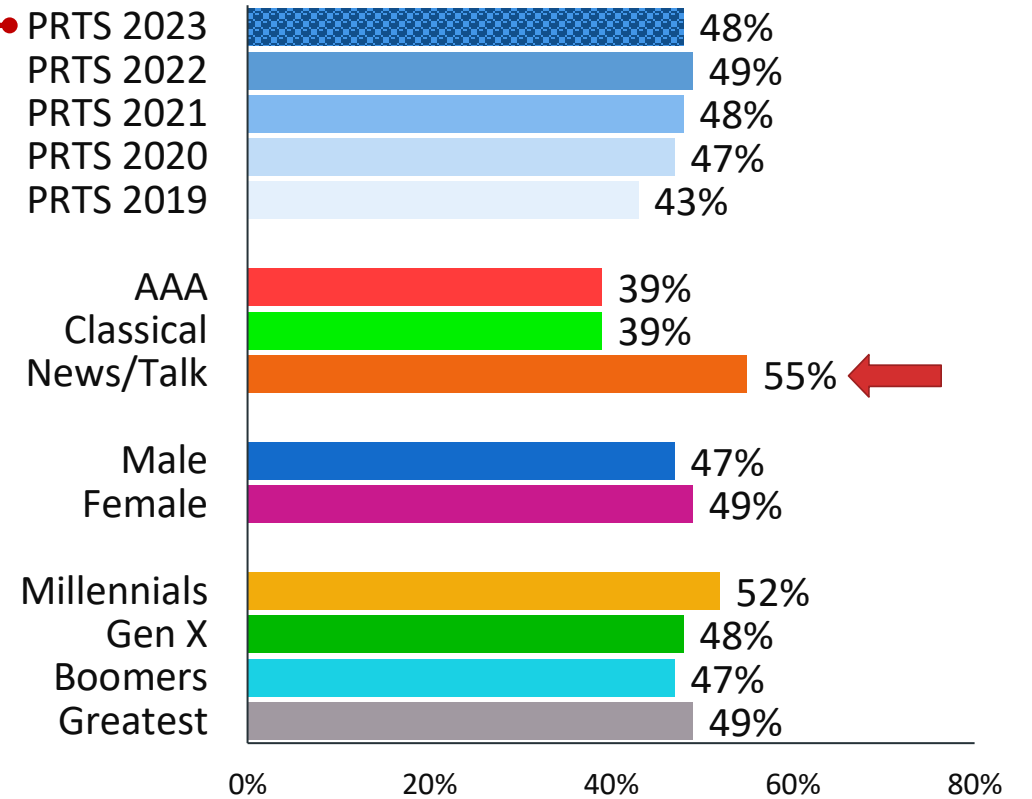


# News/Talk Listeners Are Especially Likely to Listen to Daily News Podcasts Weekly or More

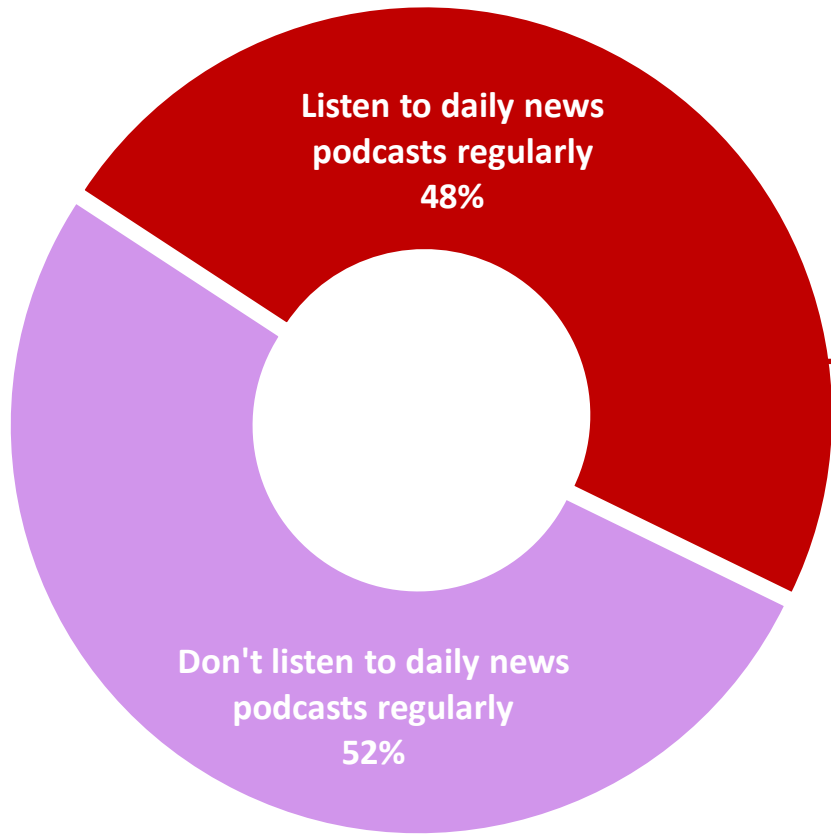


*“Which of the following daily news podcasts -- featuring news and headlines each morning -- do you listen to at least once per week or more often?”*

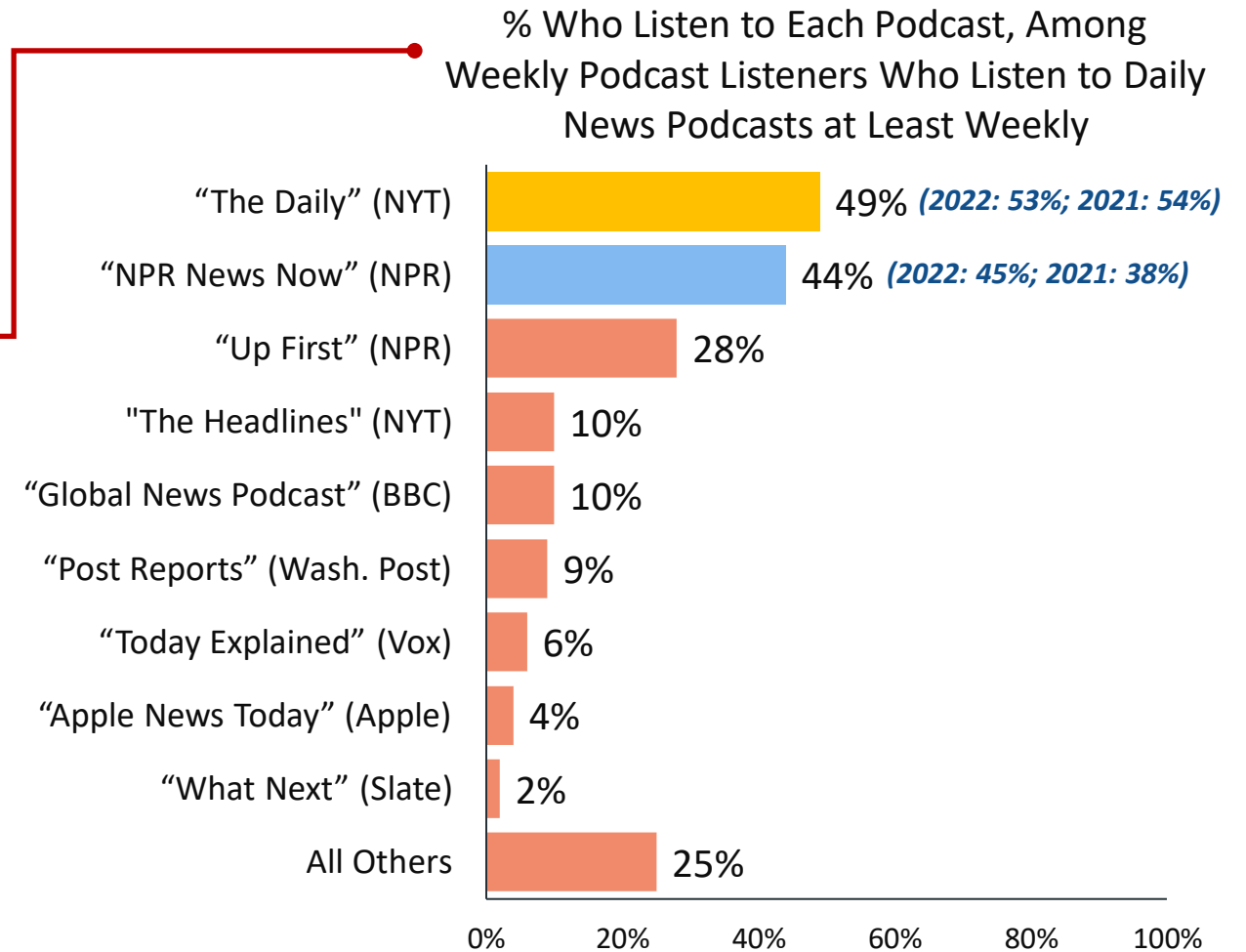
Among Weekly Podcast Listeners, % Who Listen to Daily News Podcasts at Least Weekly



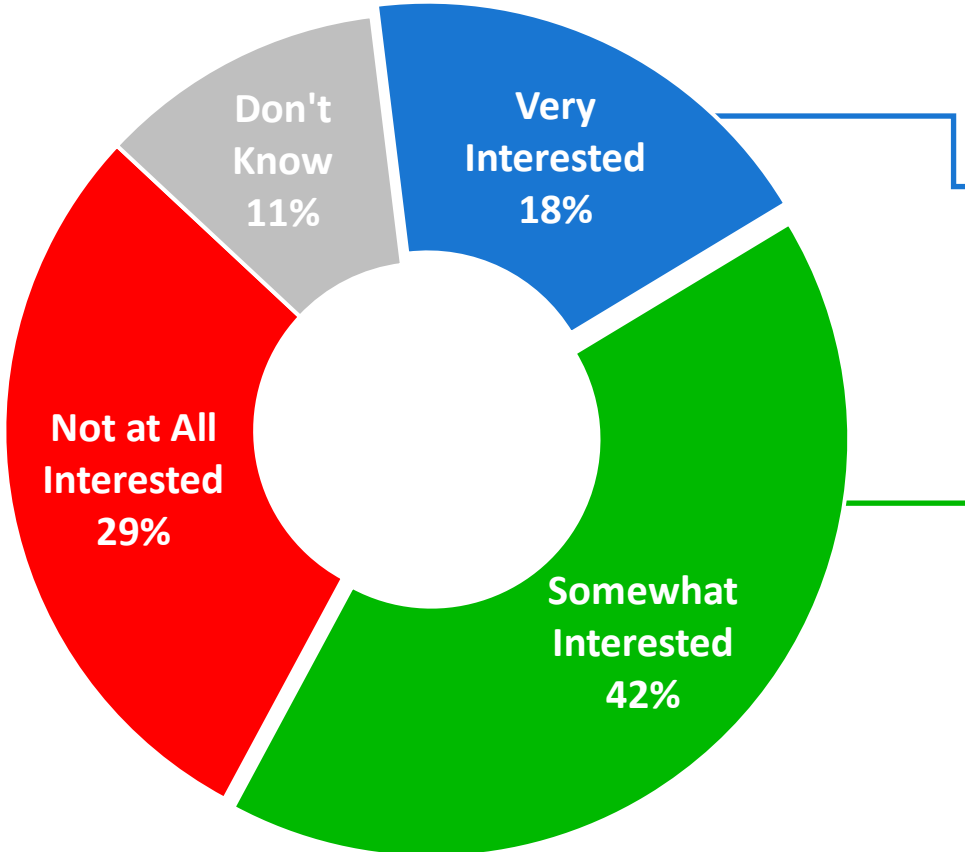
# Half of Daily News Podcast Users Listen to “The Daily” At Least Weekly, Though Its Lead Is Slipping



*“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?”*

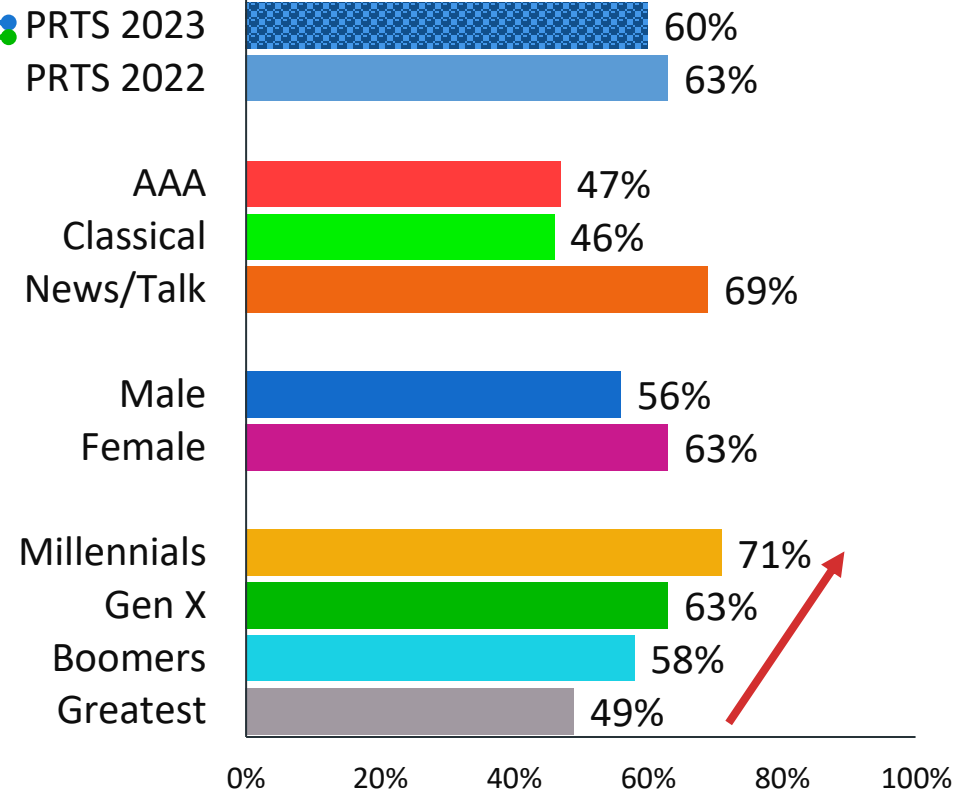


# Six in Ten Weekly Podcast Listeners Show at Least Some Interest in a Daily Morning Podcast From Their P1 Station



*“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 Weekly Podcast Listeners,  
% Interested (Very + Somewhat) in a Daily Morning Podcast From Their P1 Station Covering Local/Region News & Events



# Audience Research Beyond Demographics

**Learning Gap:** A national segmentation of American adults designed to identify which cohorts are most promising for public radio audience growth and what tactics could be leveraged to reach them and appeal to them.

**Research Solution:** Conversations around audience growth for public media tend to focus on two terms: capturing “younger” and “move diverse” listeners. These two points of focus are valuable in and of themselves for two reasons. First, listenership and membership for public radio has long skewed older and, as this population ages, it will be crucial to maintain the pipeline with younger listeners—either in capturing them now, or building relationships with them that might flower in the future. Second, the US population has continued to become more racially and ethnically diverse and, as a public service, the very mission of public radio is that its voice and content should reflect this increasingly diverse population.

At the same time, though, a *purely demographic* focus on age, race, and ethnicity assumes that these segments—“young” adults, or “BIPOC audiences”—think and act monolithically. If the goal of audience growth for public media is to engage with members of the general public who are not currently engaged with public radio, but have high potential to do so, the strategies to achieve this should focus instead on thinking about the population *psychographically*—in other words, looking for people who share the same values and interests, and whose values and interests align closely with public radio.



PRPD

GREATER  
PUBLIC

**Public Radio  
Playbook**



# White Paper

[jacobsmedia.com/audience-growth-research-strategy-for-public-radio/](https://jacobsmedia.com/audience-growth-research-strategy-for-public-radio/)

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