

Jacobs
media strategies



public radio techsurvey 2024

9 Key Takeaways

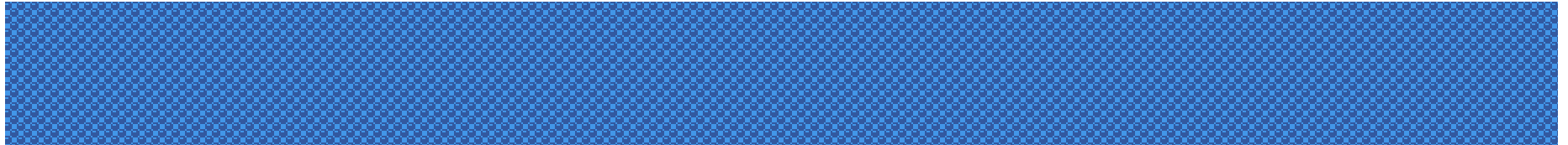


Methodology

- 62 U.S. Public Radio stations
- N = 22,208
- Interview dates: June 11-July 15, 2024
- 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 2024 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.

Format Key

PRTS 2024



AAA



Classical



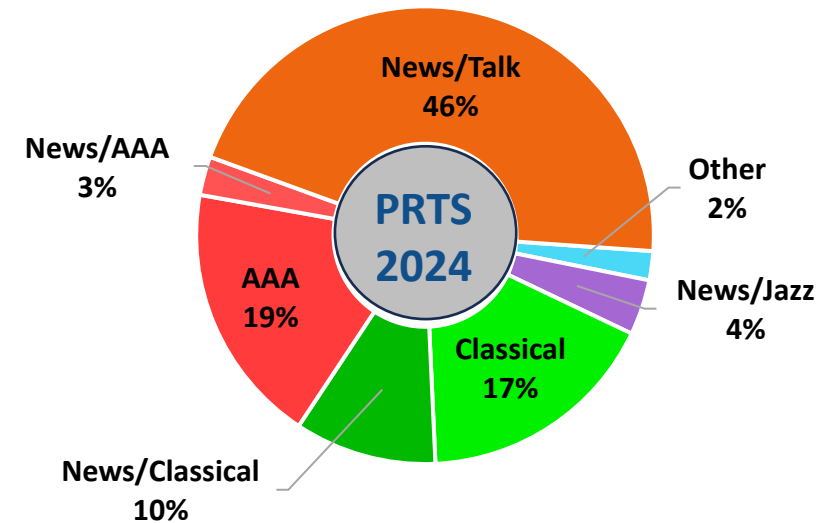
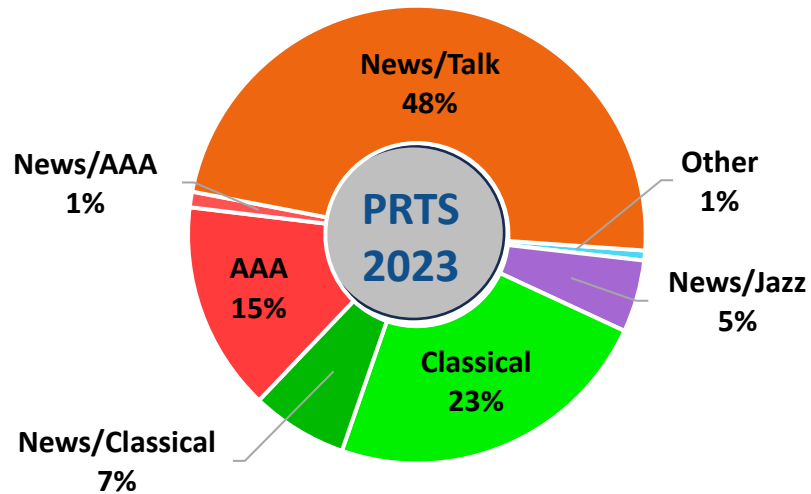
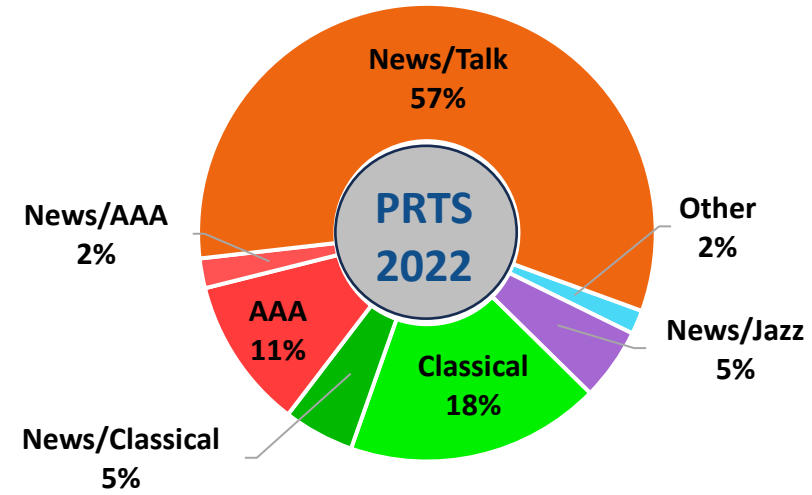
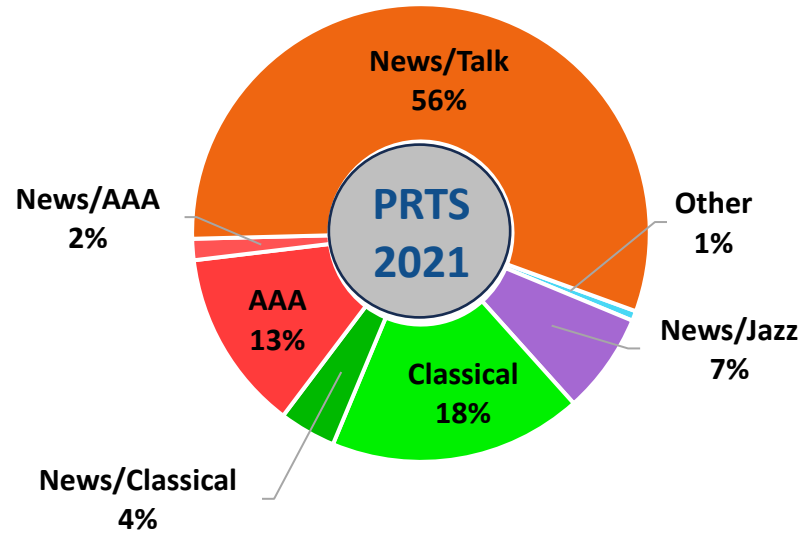
News/Talk



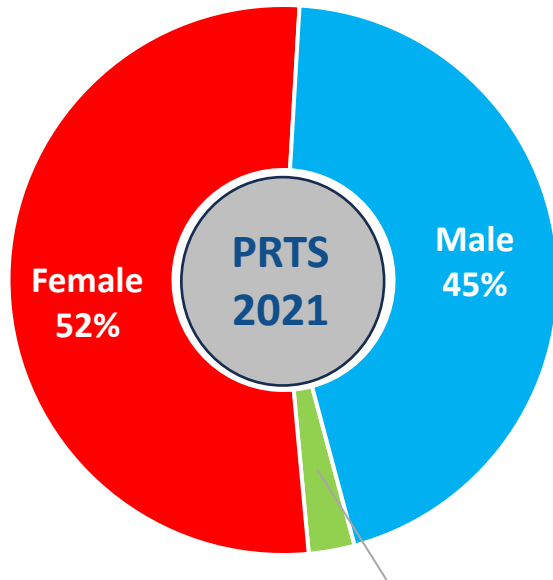


The public radio **techsurvey** **2024** Sample

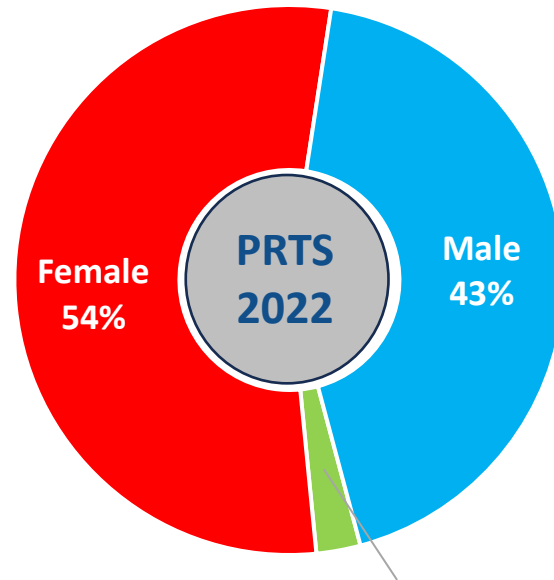
Format Composition



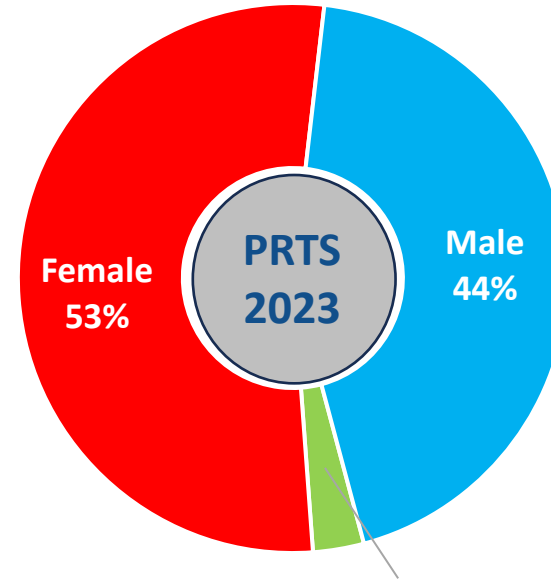
Women Dominate the Public Radio Core Sample



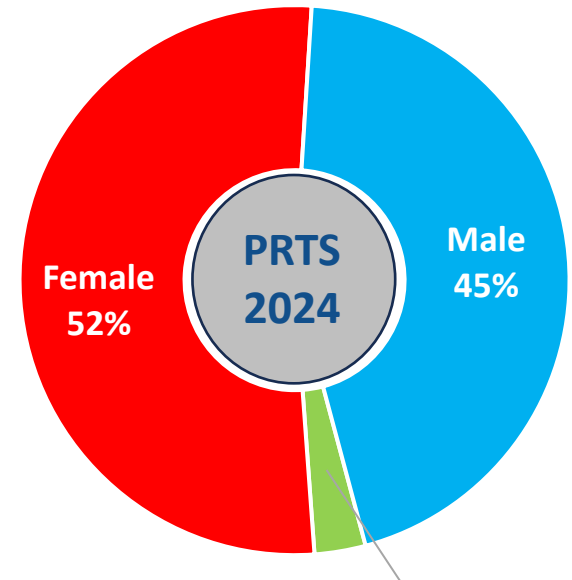
Non-Conforming/Prefer
Not to Say
3%



Non-Conforming/Prefer
Not to Say
3%



Non-Conforming/Prefer
Not to Say
3%

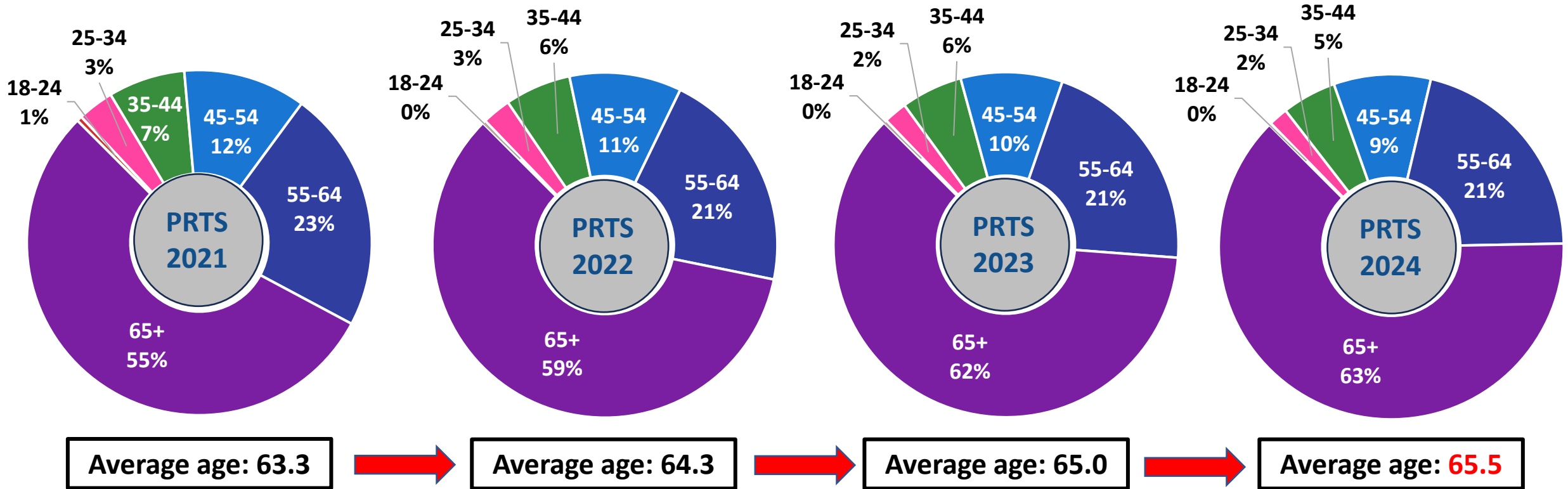


Non-Conforming/Prefer
Not to Say
3%

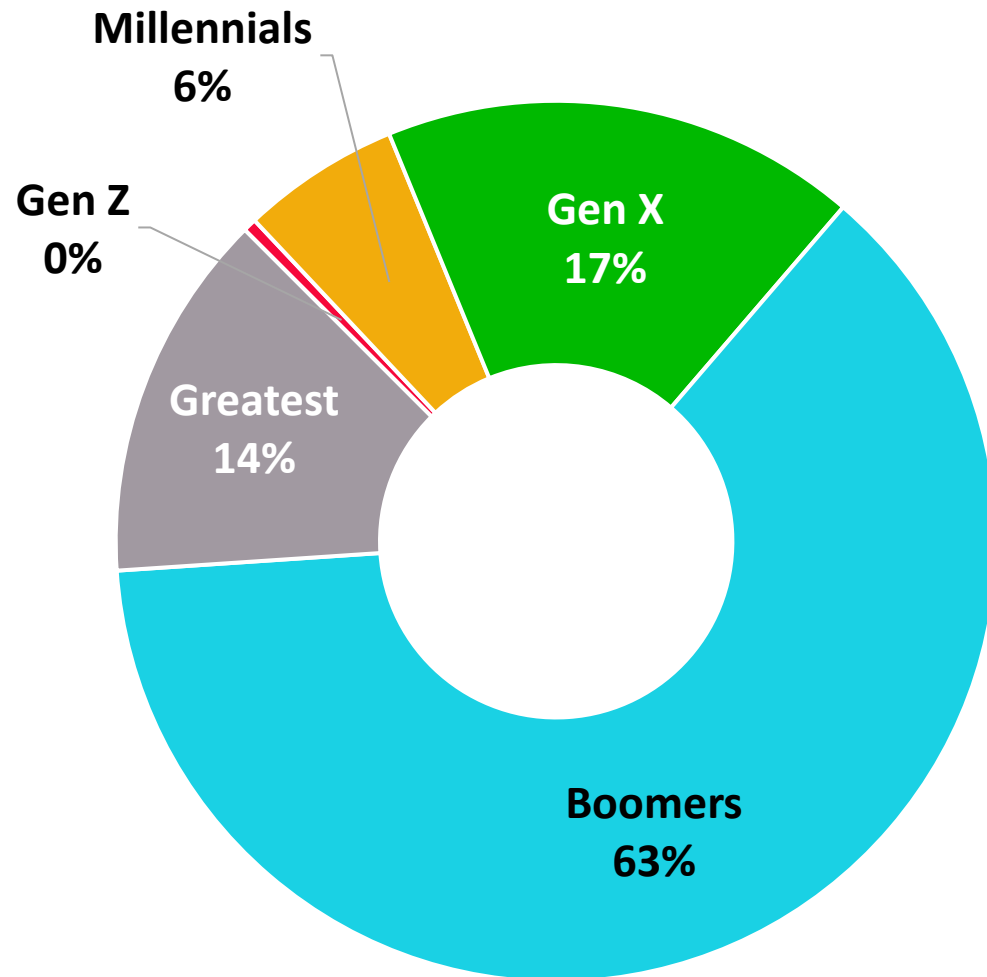


The aging process marches on in Public Radio (as it does in all of broadcast radio).

PRTS (and Public Radio) Continue to Age



Three of Every Four Public Radio Listeners Are Now 60 Years of Age – Or Older



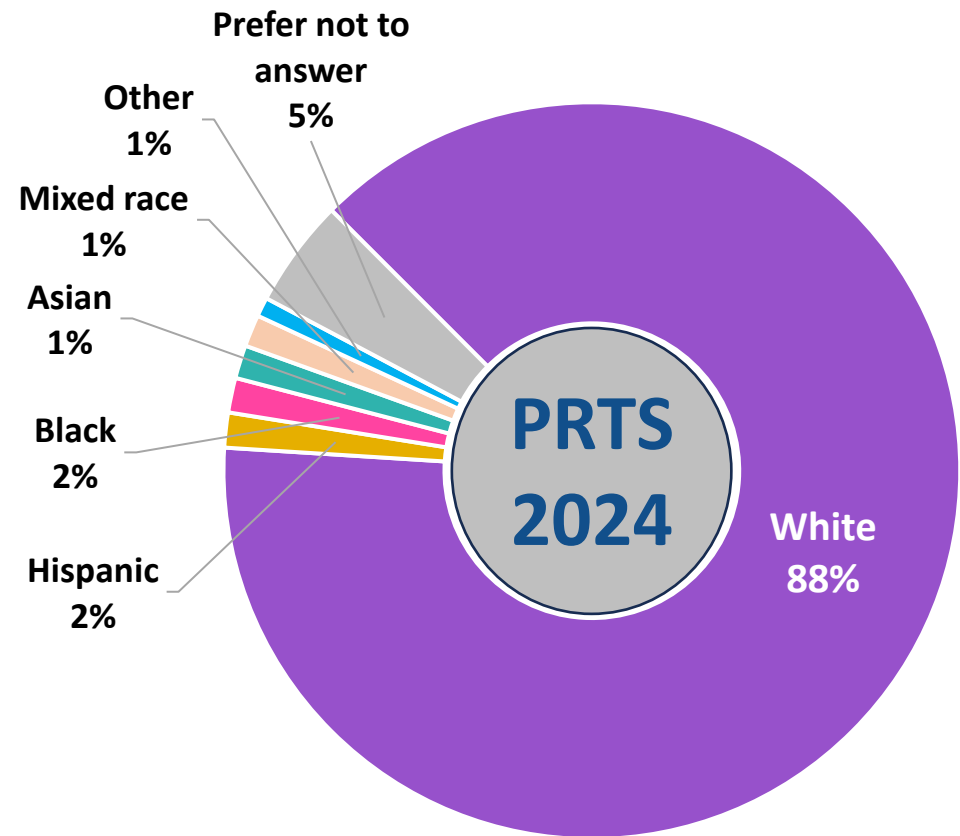
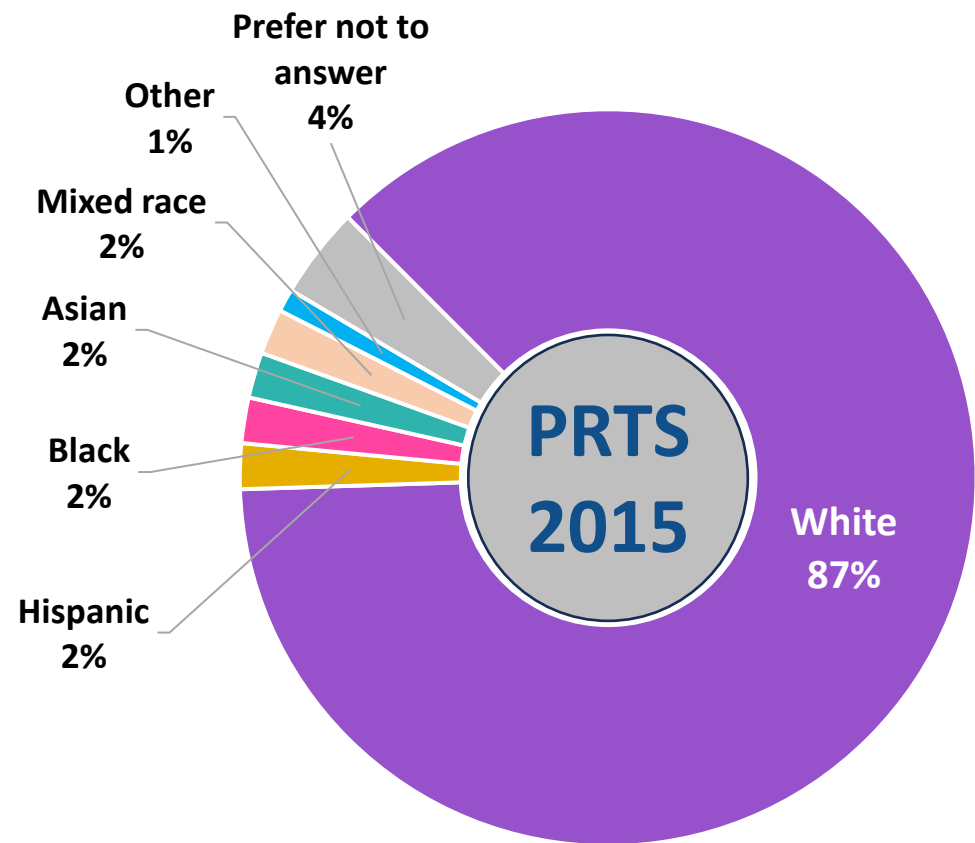
Millennials (born between 1981-1996)

Gen X (born between 1965-1980)

Baby Boomer (born between 1946-64)

Greatest Generation (born before 1946)

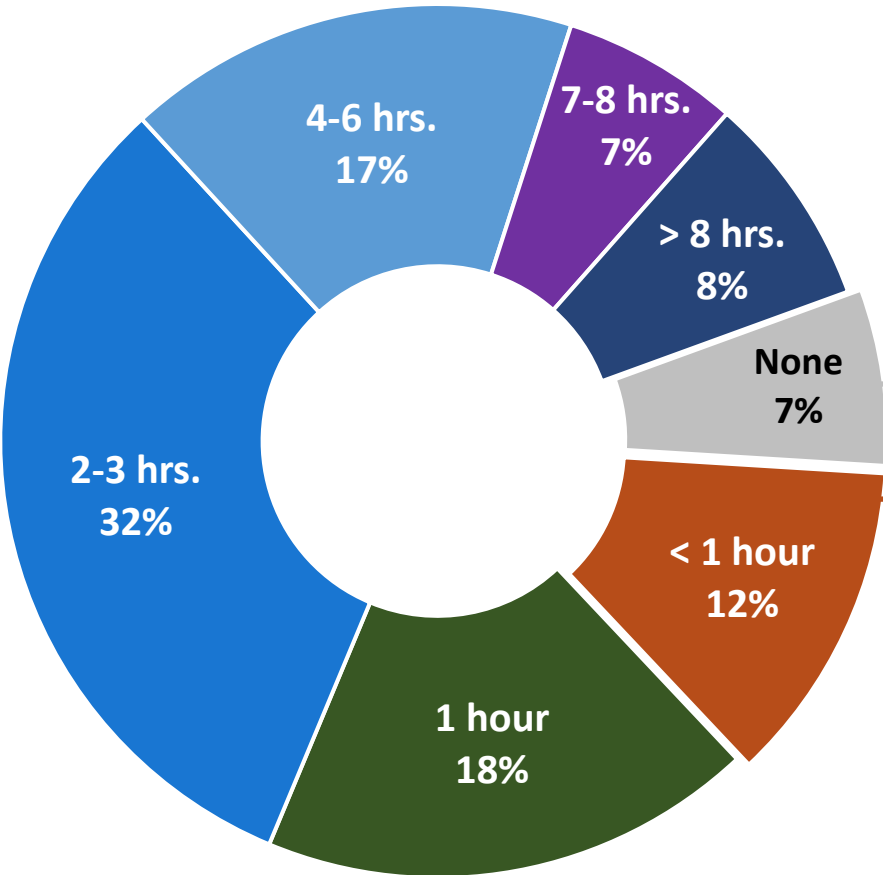
Public Radio's Core Audience Remains Overwhelmingly White



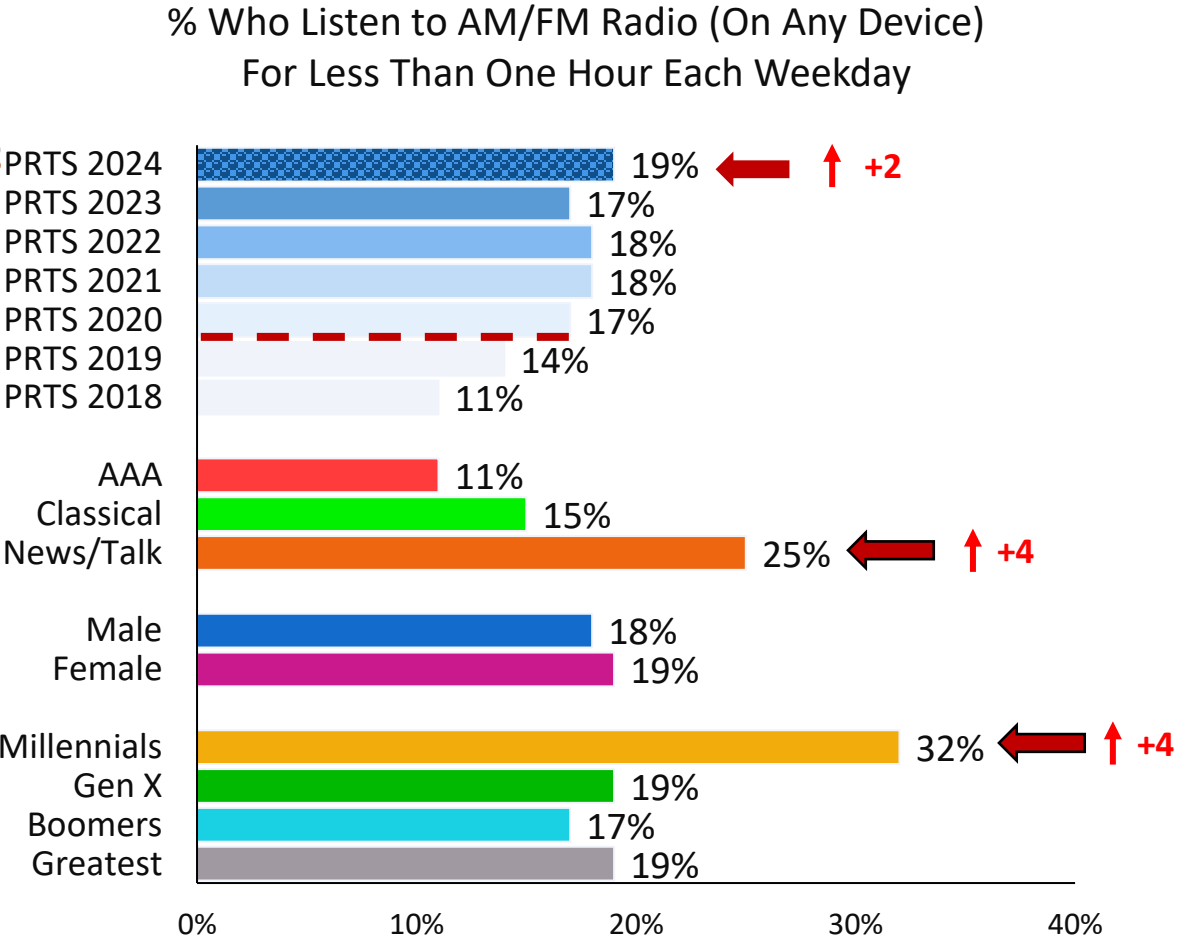


Radio listening is mostly stagnant and other vital signs continue downtrending, including Public Radio's core values.

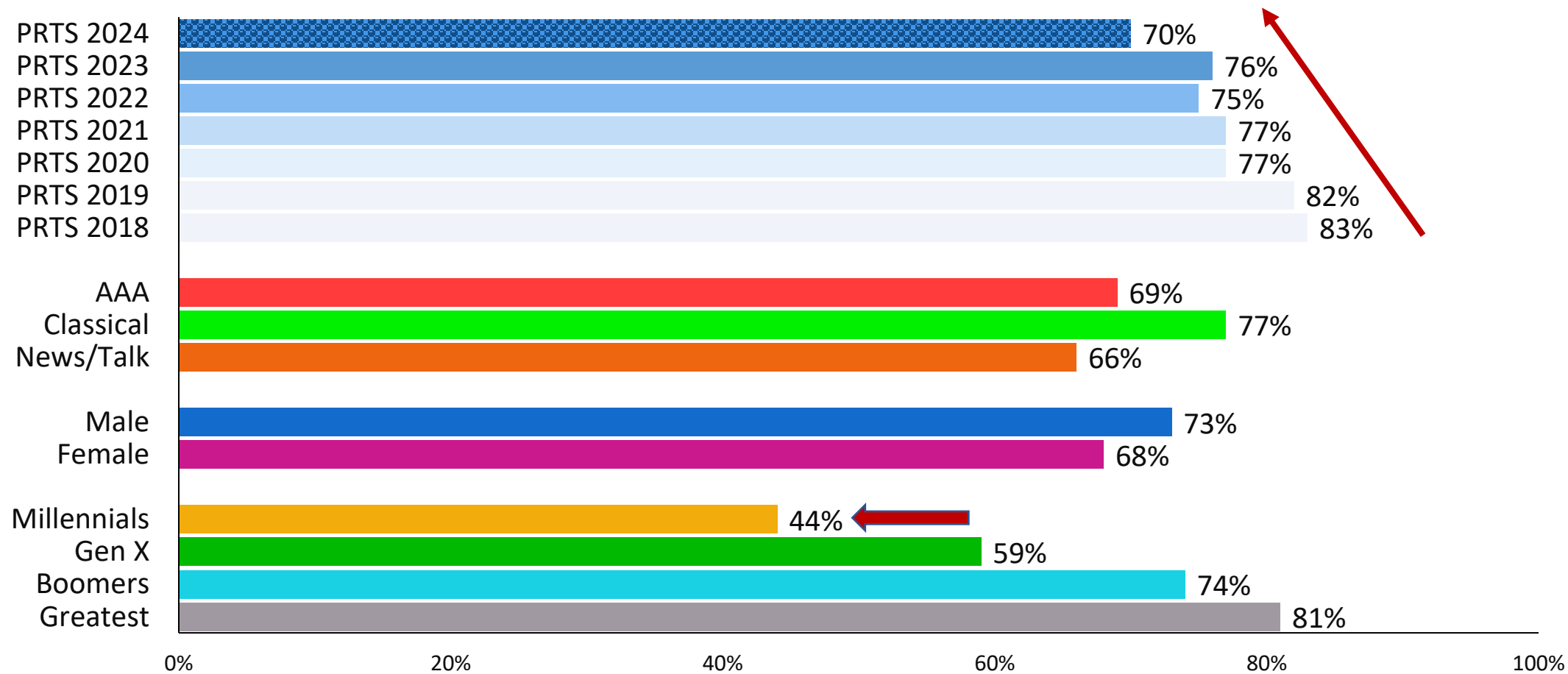
Nearly One-Fifth of Core Public Radio Fans Don't Tune In One Hour a Day, Especially News/Talk Listeners and Millennials



“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)?”

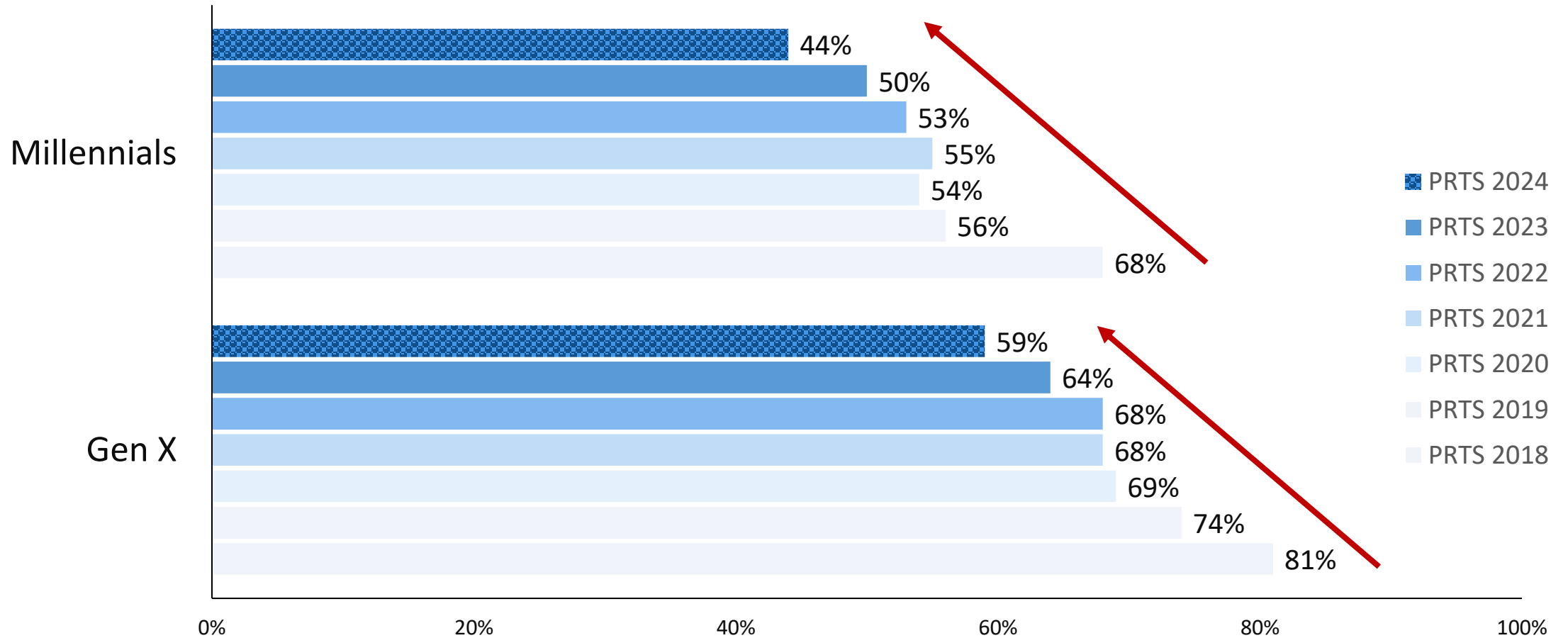


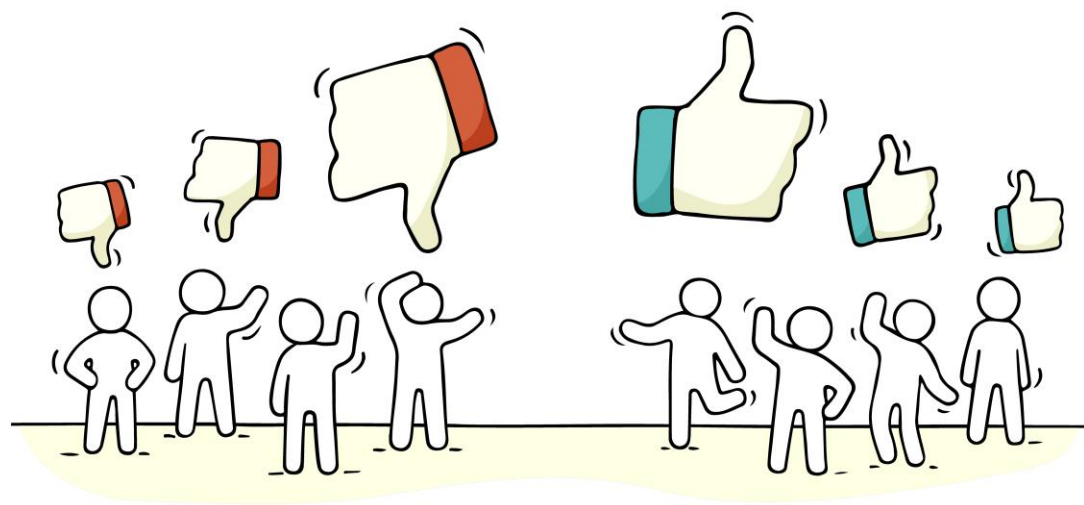
An All-Time Low: Only Seven in Ten Public Radio Fans Have a Regular Radio Where They Live, Especially Millennials



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

A Telling Trend: Less Than Half of Millennials and Only About Six in Ten Gen Xers Now Own a Working Radio at Home



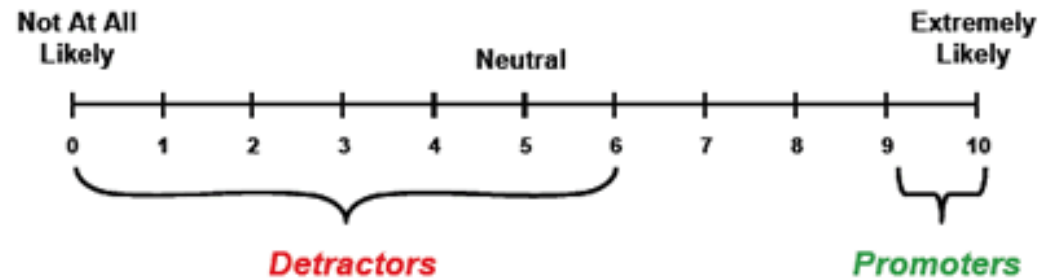


Where's the *buzz*? Public Radio's recommendation scores are underwhelming since COVID – especially for News/Talk stations.

NET PROMOTER

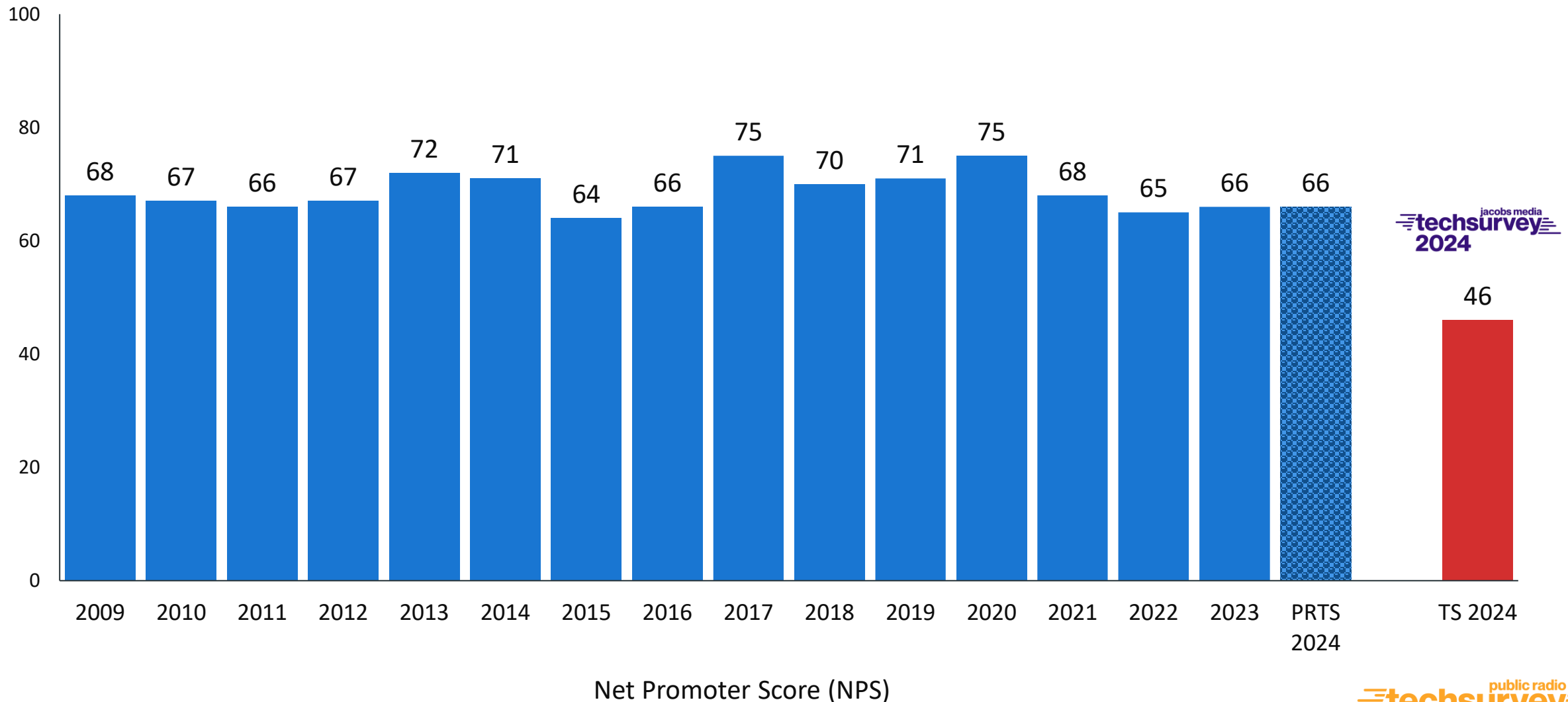


Likelihood To Recommend

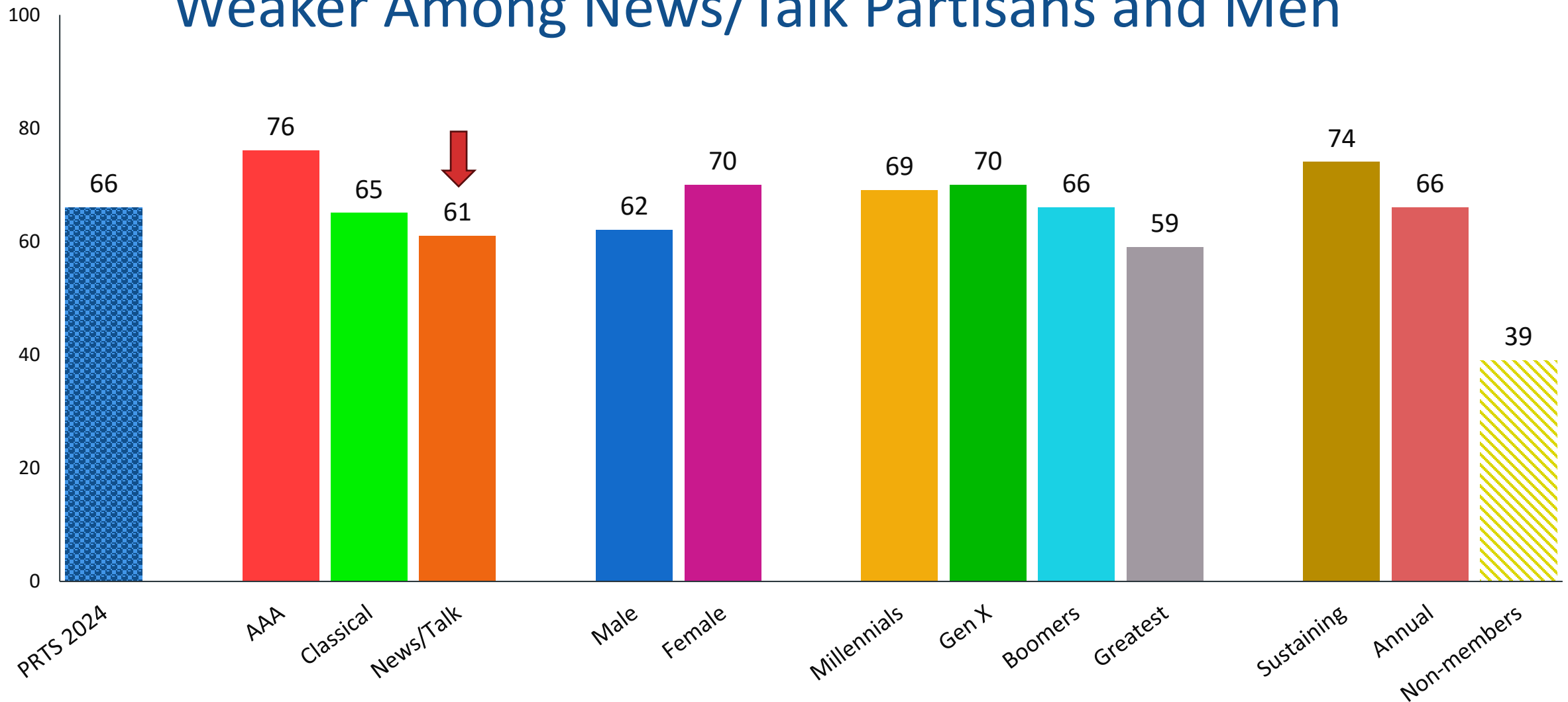


$$\% \text{ Promoters} - \% \text{ Detractors} = \text{Net Promoter Score}$$

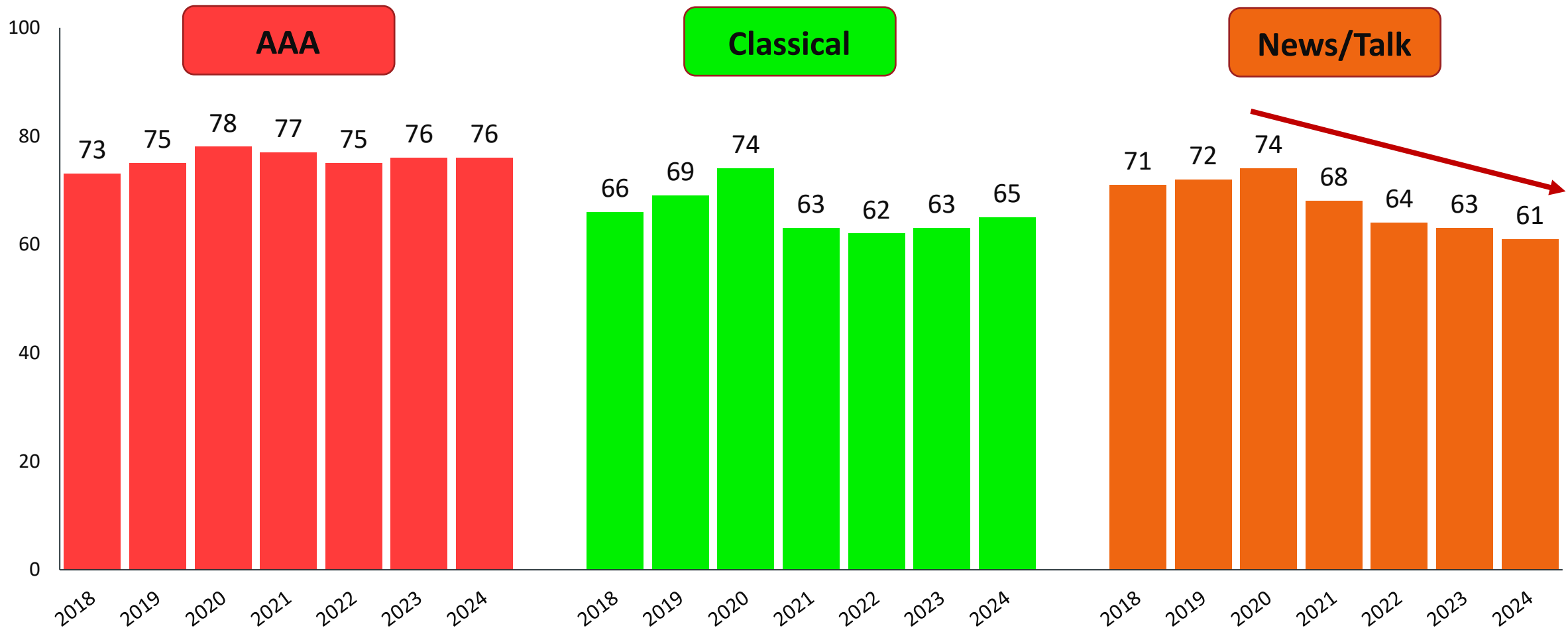
Public Radio's Net Promoter Scores Stabilize, But Still Remain Well Below Pre-COVID Highs

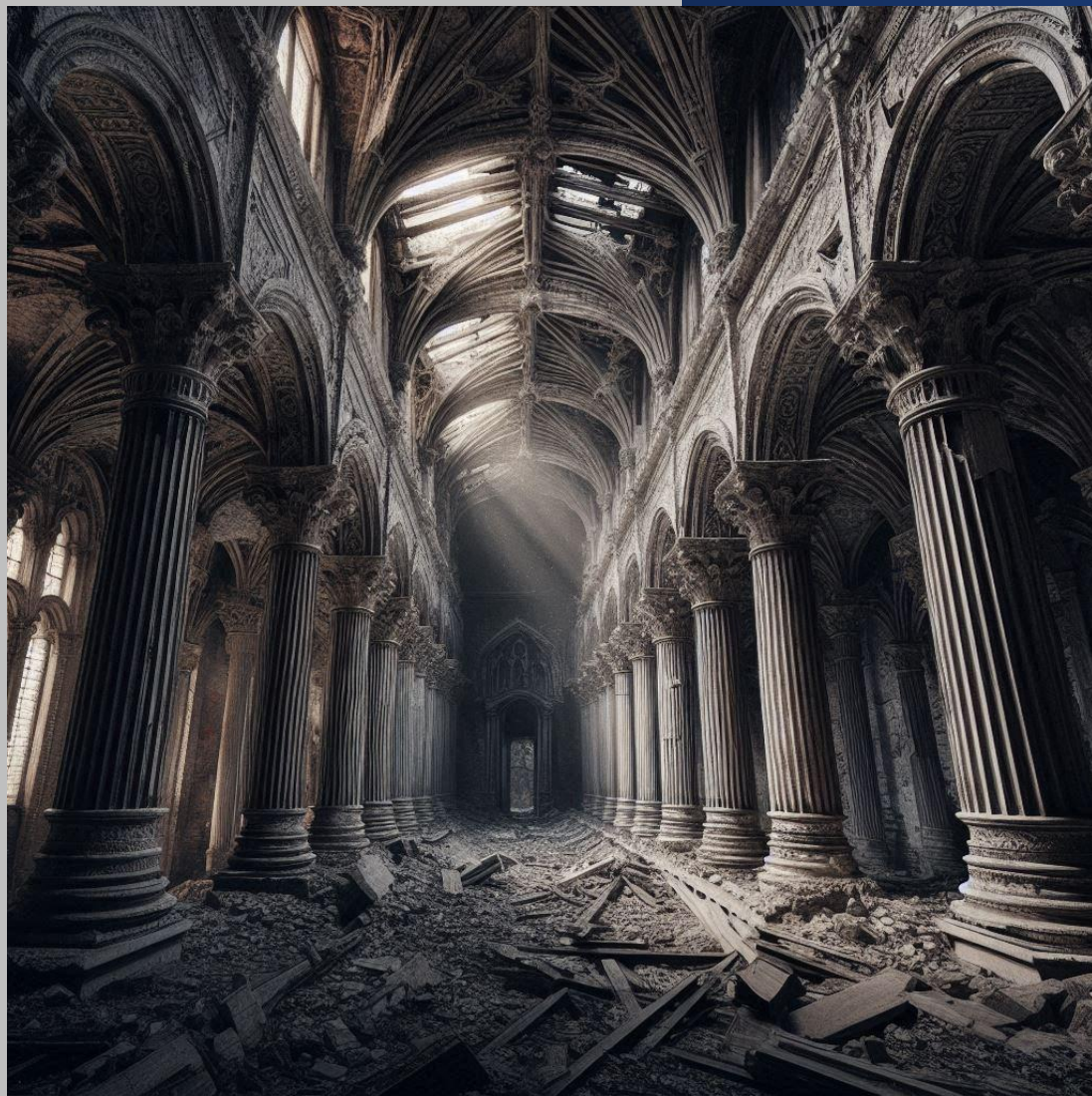


NPS Is Best Among Triple A Fans, Women, and Sustainers, Weaker Among News/Talk Partisans and Men



Triple A NPS Scores Are Solid, But News/Talk Continues to Trend Lower

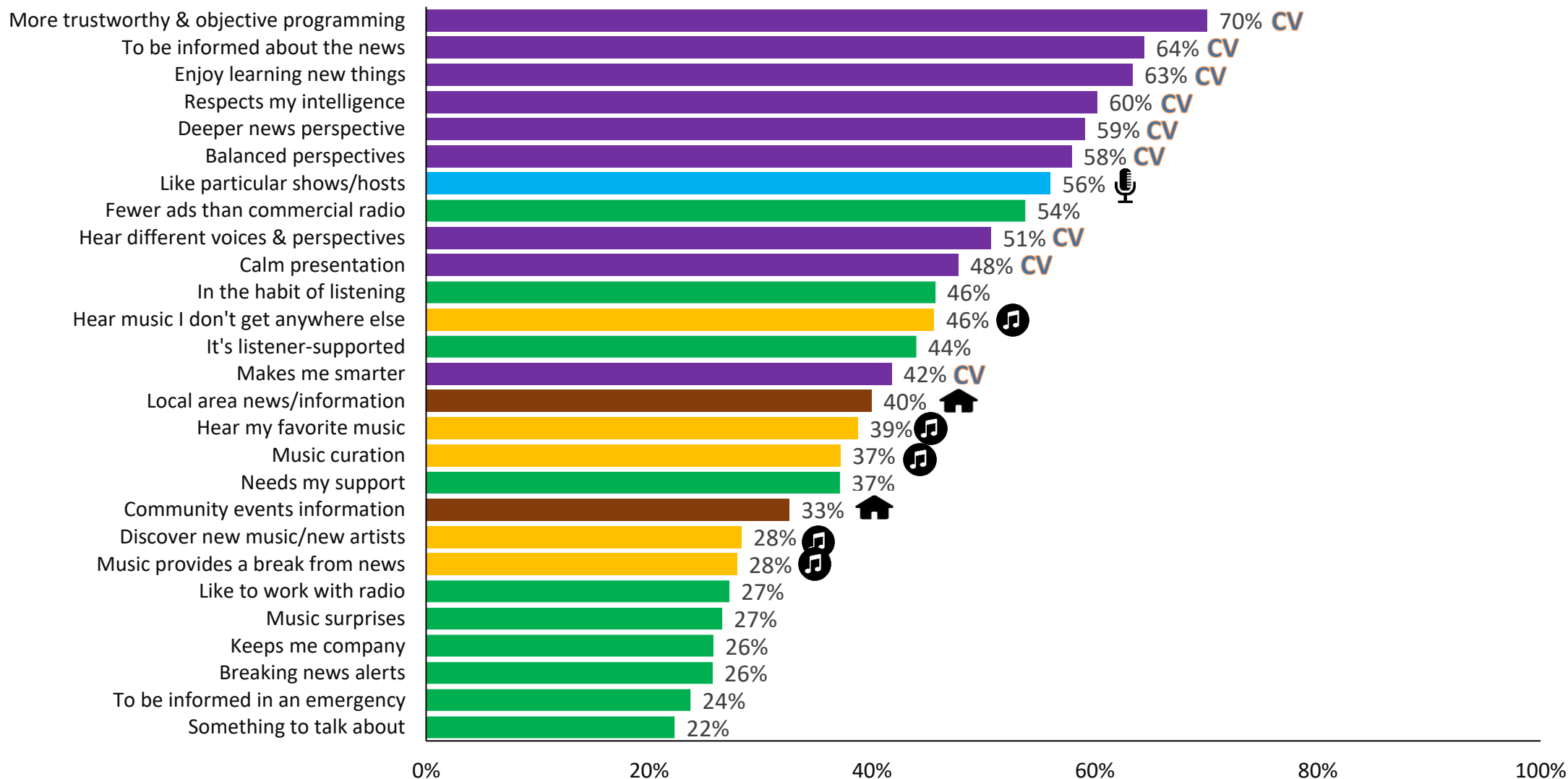




2

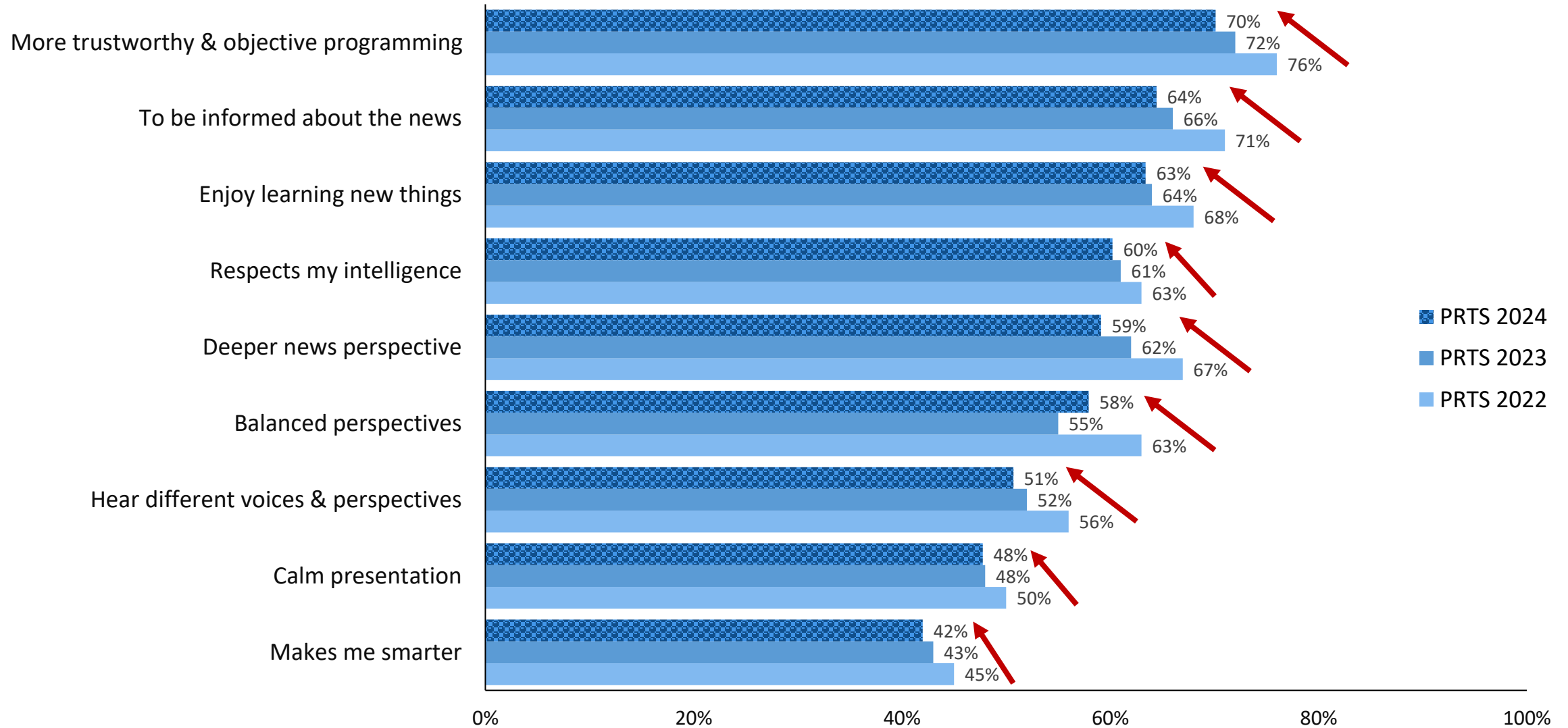
Public Radio's
historic “core
values” are
showing signs
of slippage.

Why Public Radio? The Core Values Still Lead the Way



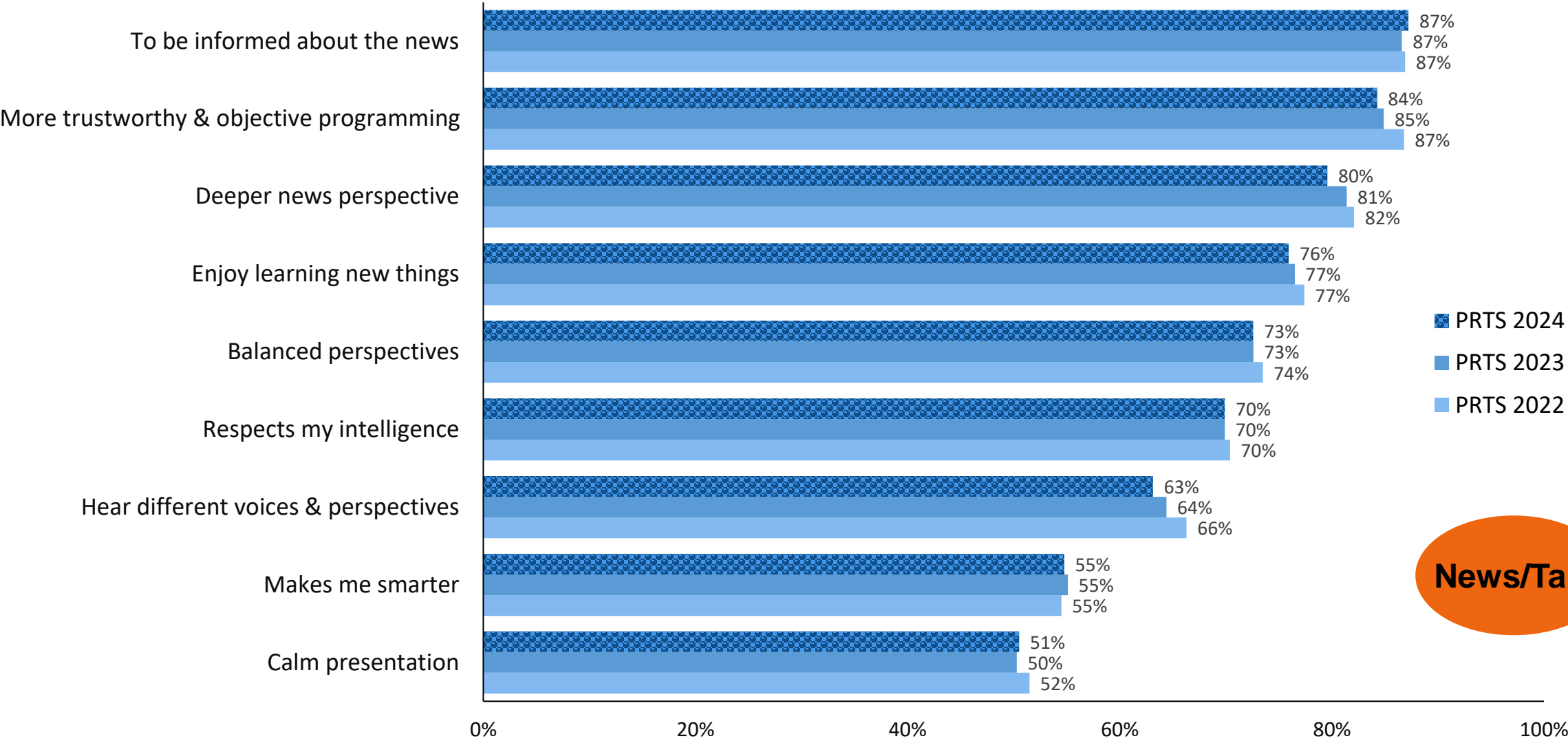
Among those who listen to AM/FM radio, % who say
this is a main reason they listen to Public Radio

But Public Radio's Core Values Appear to Be Slipping



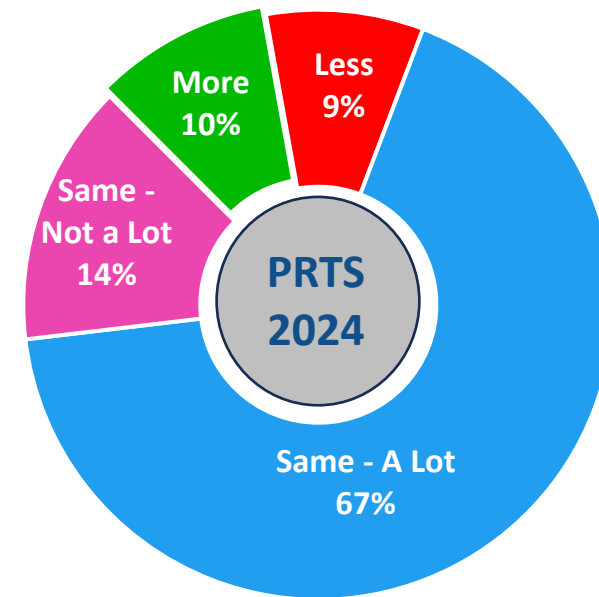
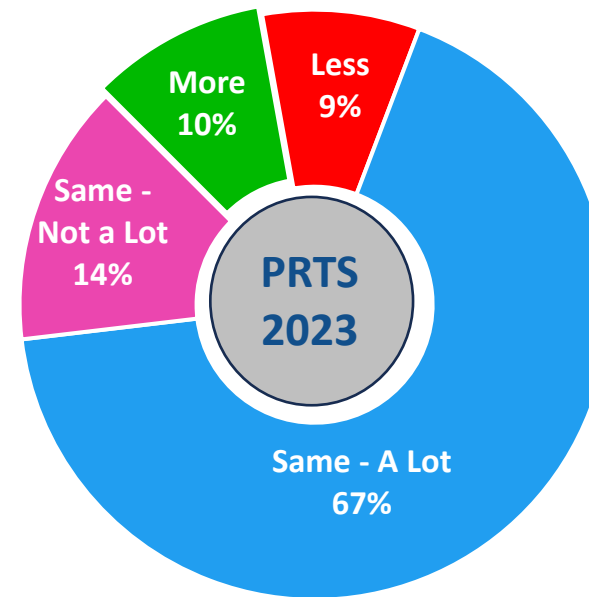
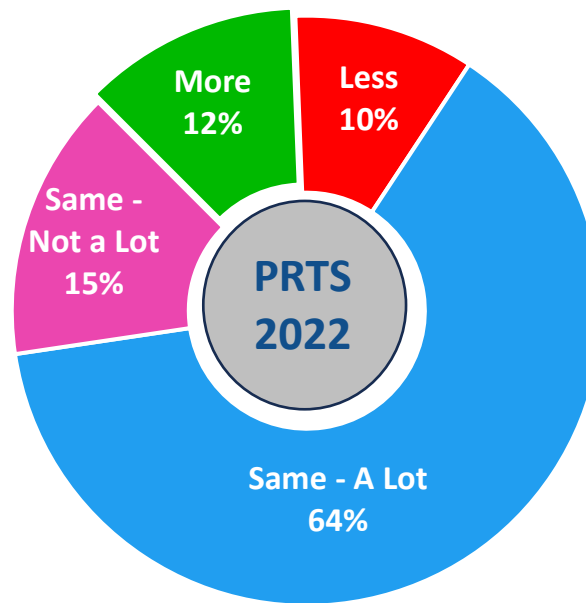
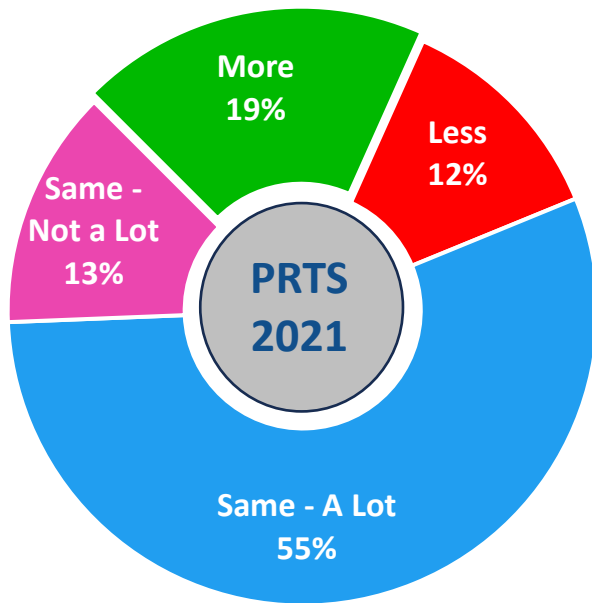
Among those who listen to AM/FM radio, % who say each core value is a main reason they listen to Public Radio

The Core Values Look Somewhat Better Among News/Talk Fans



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

Public Radio Listening Momentum Remains At a Low Point Since 2021

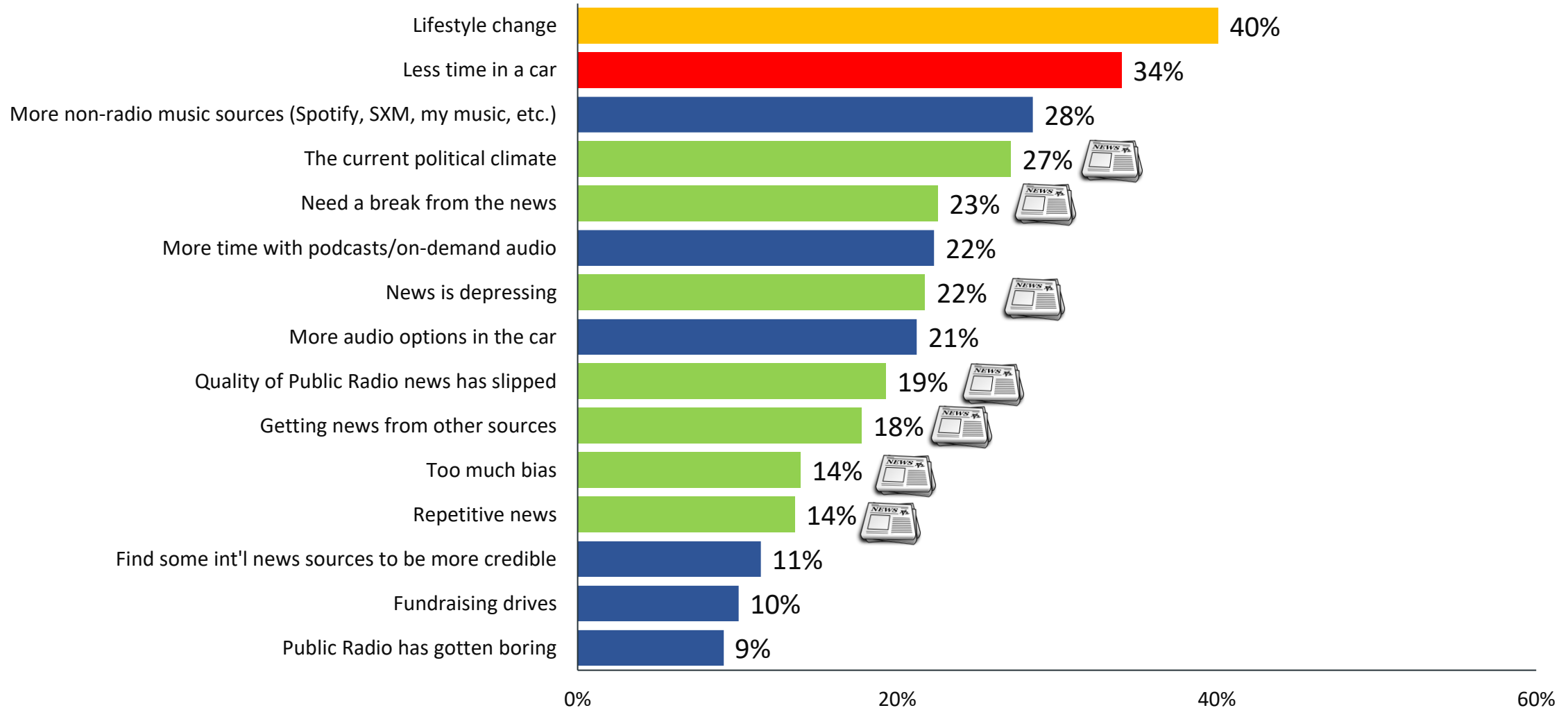


Among those who listen to AM/FM radio



Finally, we are seeing signs the disruptive effects of COVID are nearly behind us.

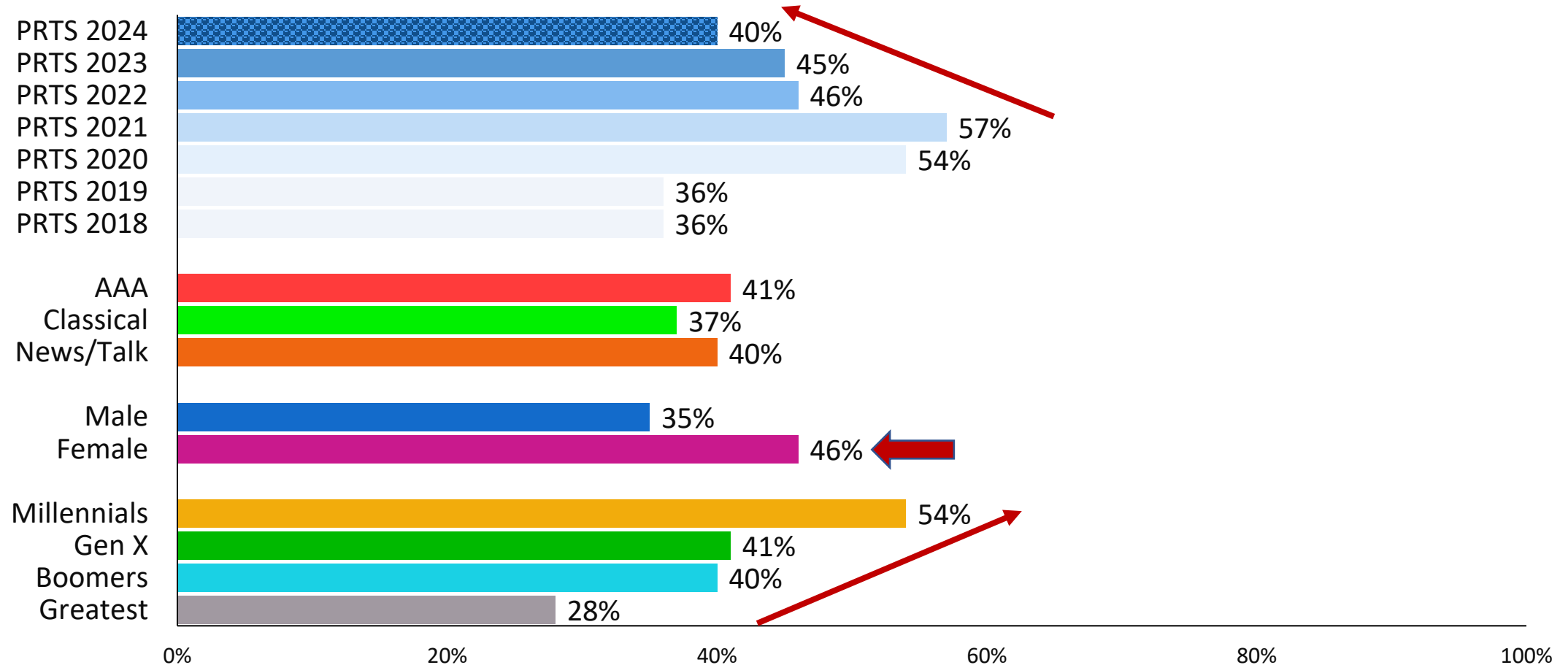
Why Less? Lifestyle and Less Time in the Car Are Most Erosive But the News Cycle Is a Factor, Too.



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

Only Four in Ten Cite “a Lifestyle Change” As a Main Reason to Listen to Public Radio Less – Lowest Since 2019

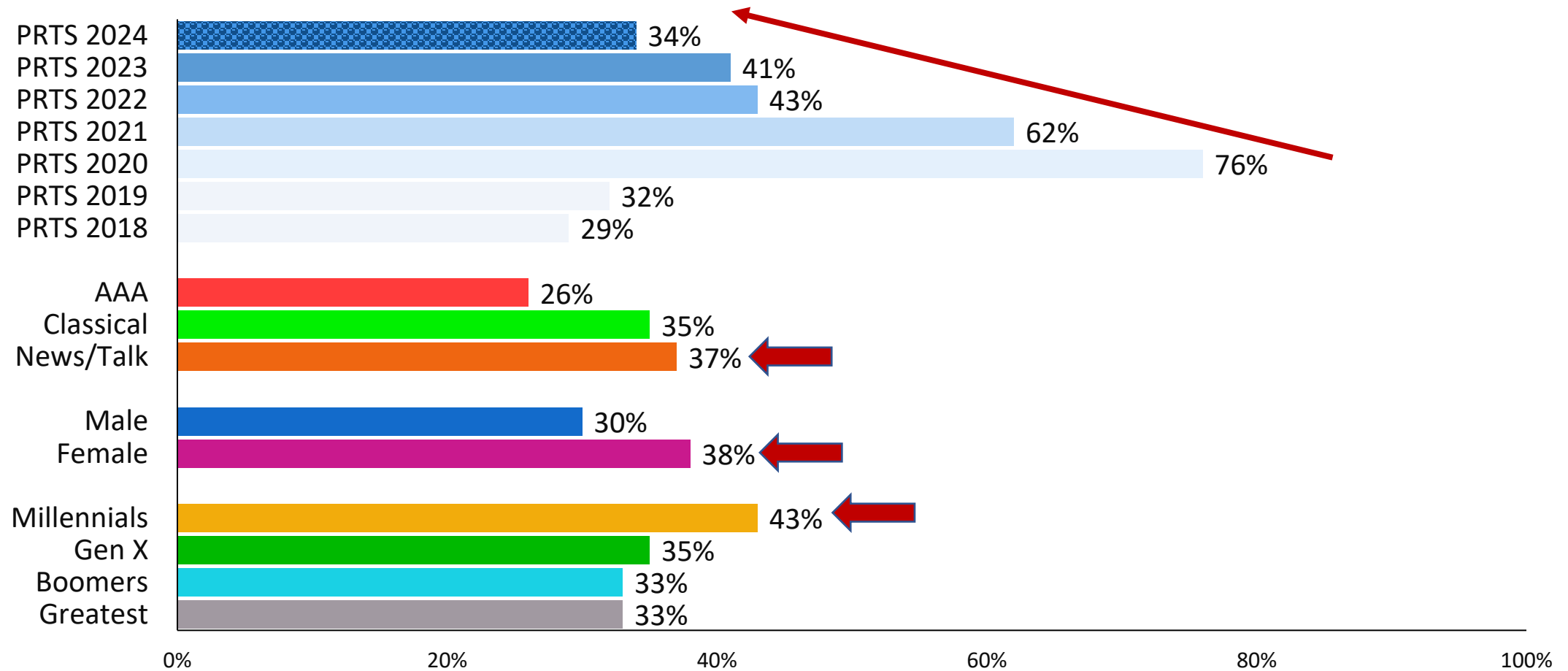
“A Lifestyle Change”



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

Only About One-Third Say a Main Reason For Listening Less Is Spending Less Time in a Car, Back to Pre-Pandemic Levels

“Spending Less Time in a Car”



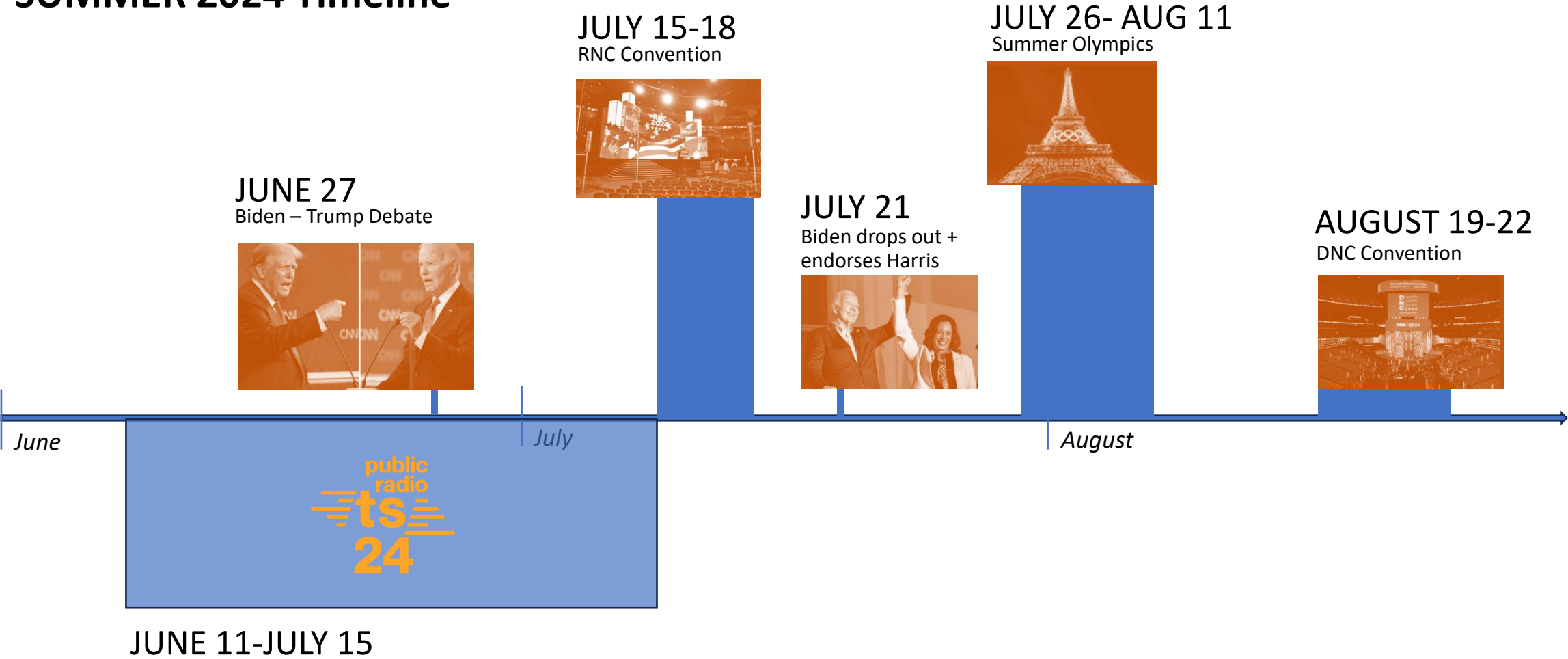
Among the 9% who say they are listening to Public Radio less in the past year,
% who say this is a main reason they listen less



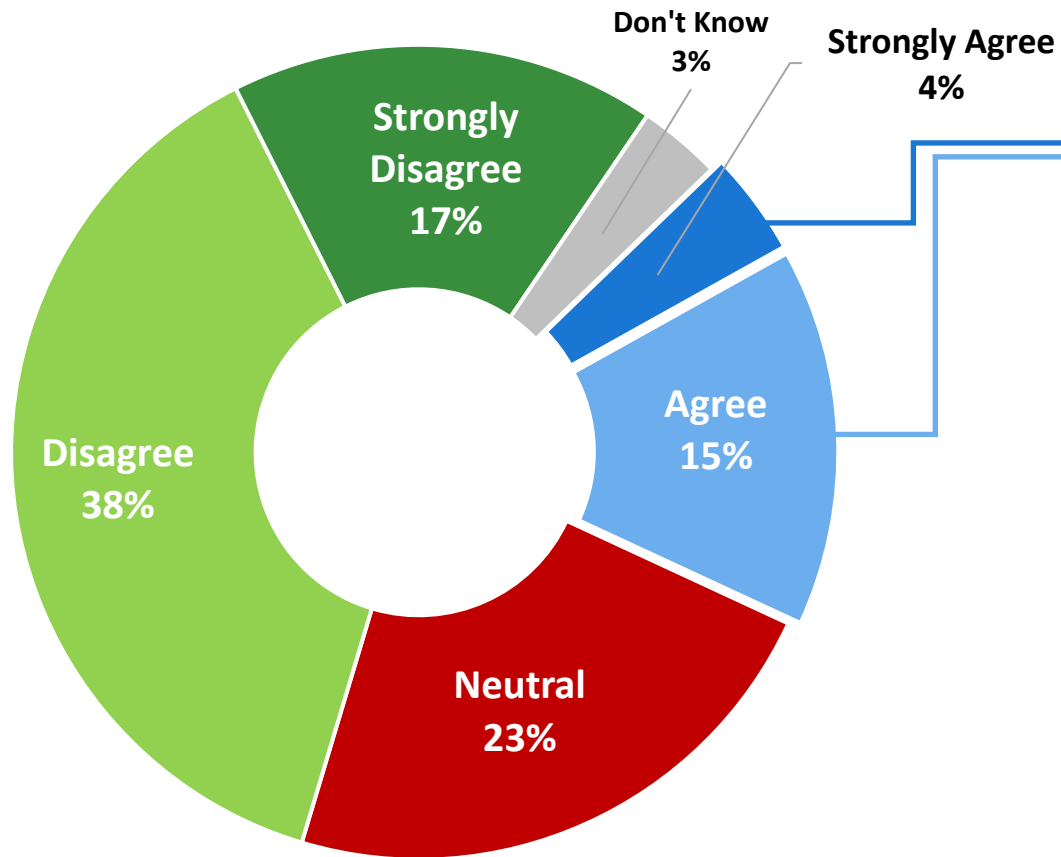
The news cycle is contributing to tune-out and the need to escape. But story repetition on Public Radio is a factor, too.



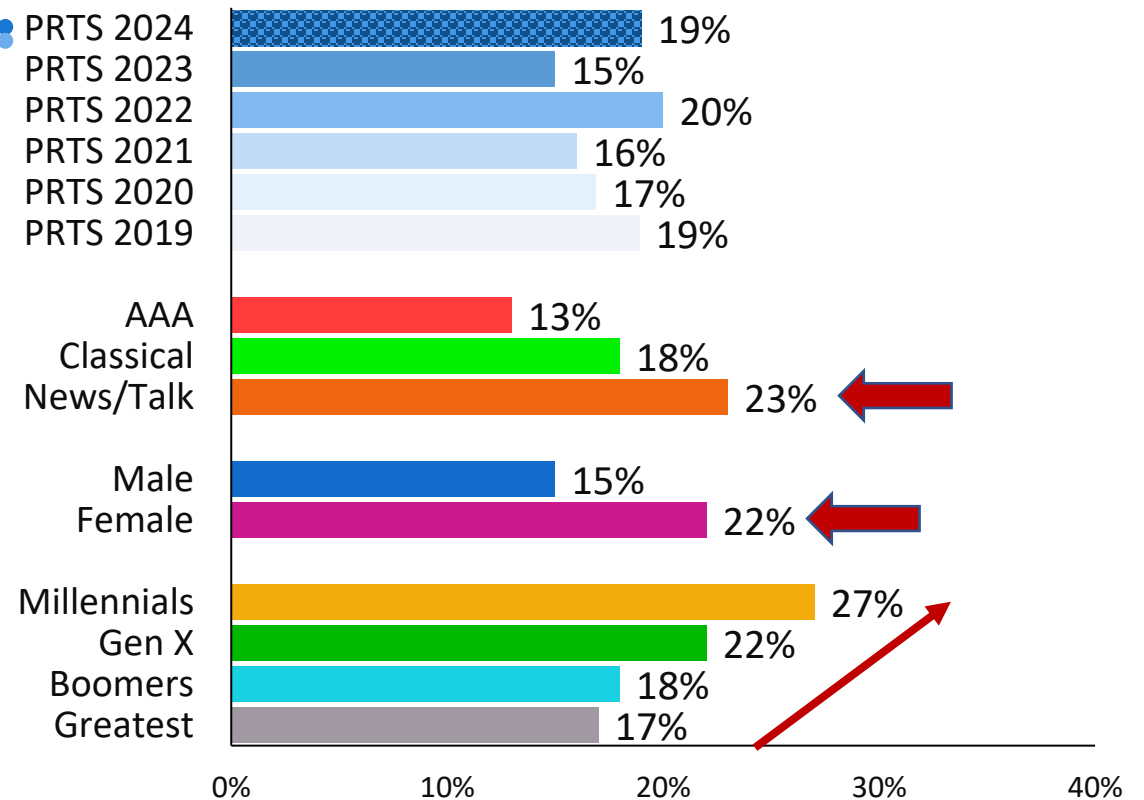
SUMMER 2024 Timeline



About One in Five Needs a Break From the News – Especially News/Talk Fans

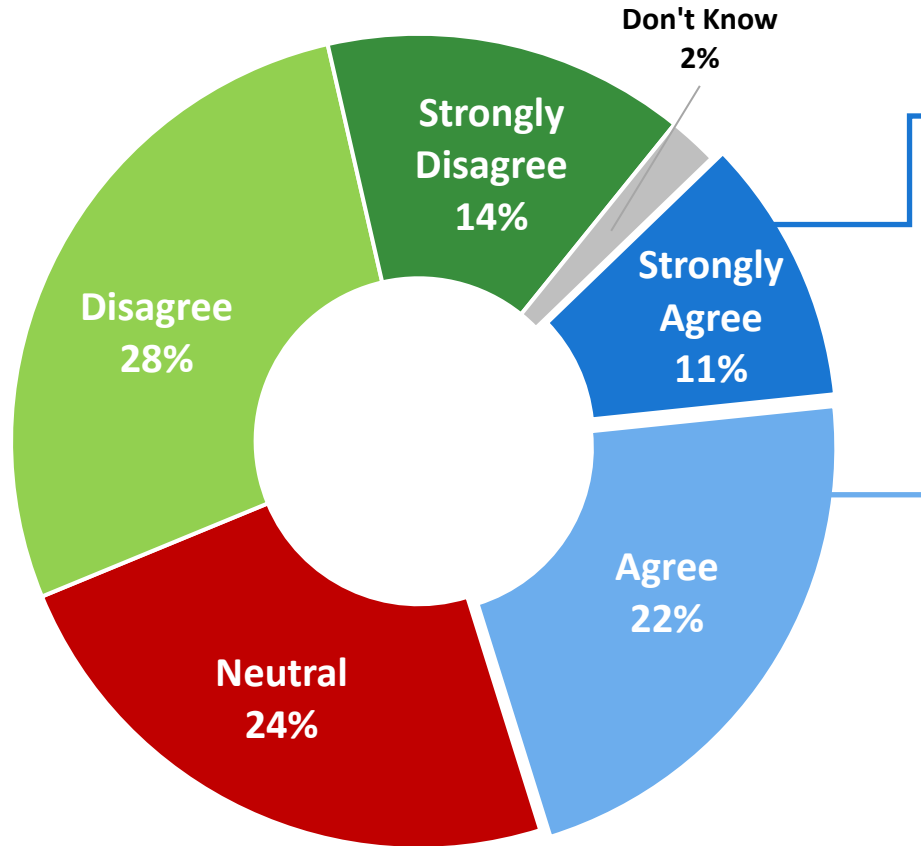


% Agreement (Strongly Agree + Agree)

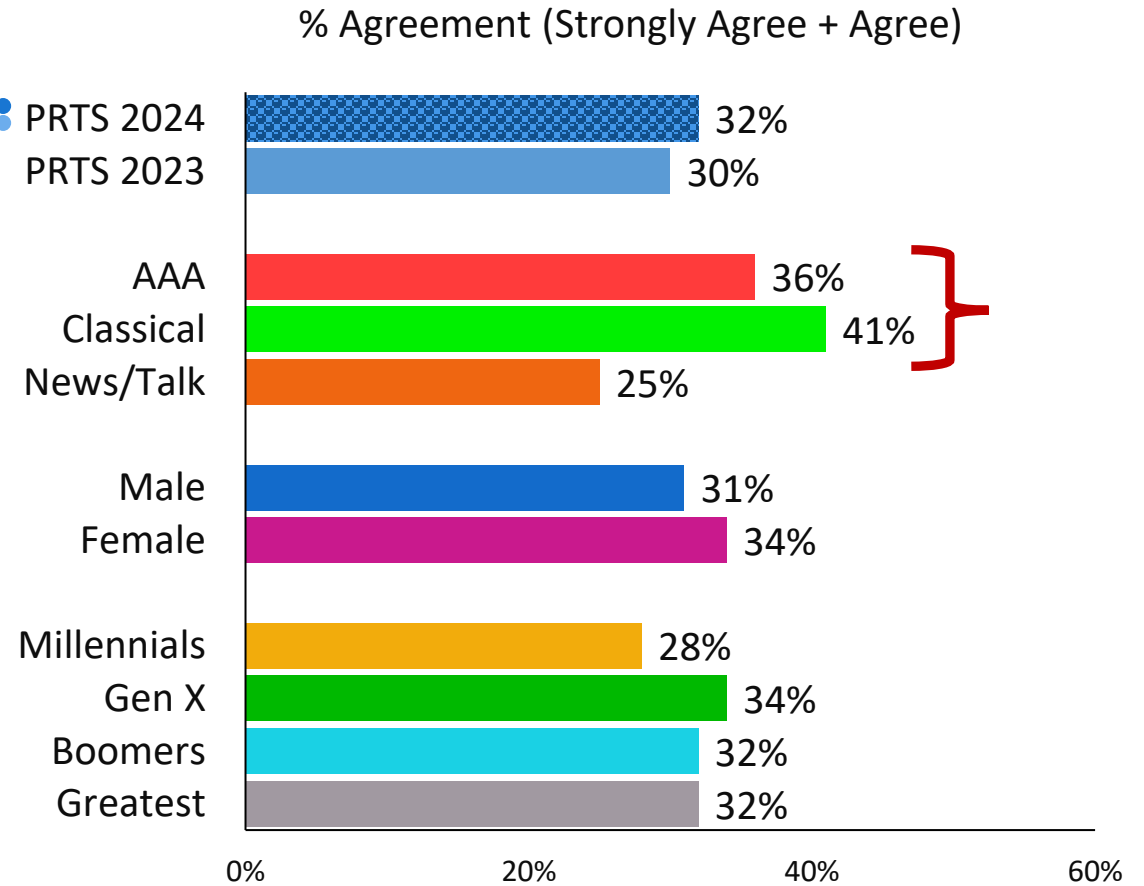


"I find myself spending less time with Public Radio because I increasingly need a break from the news"

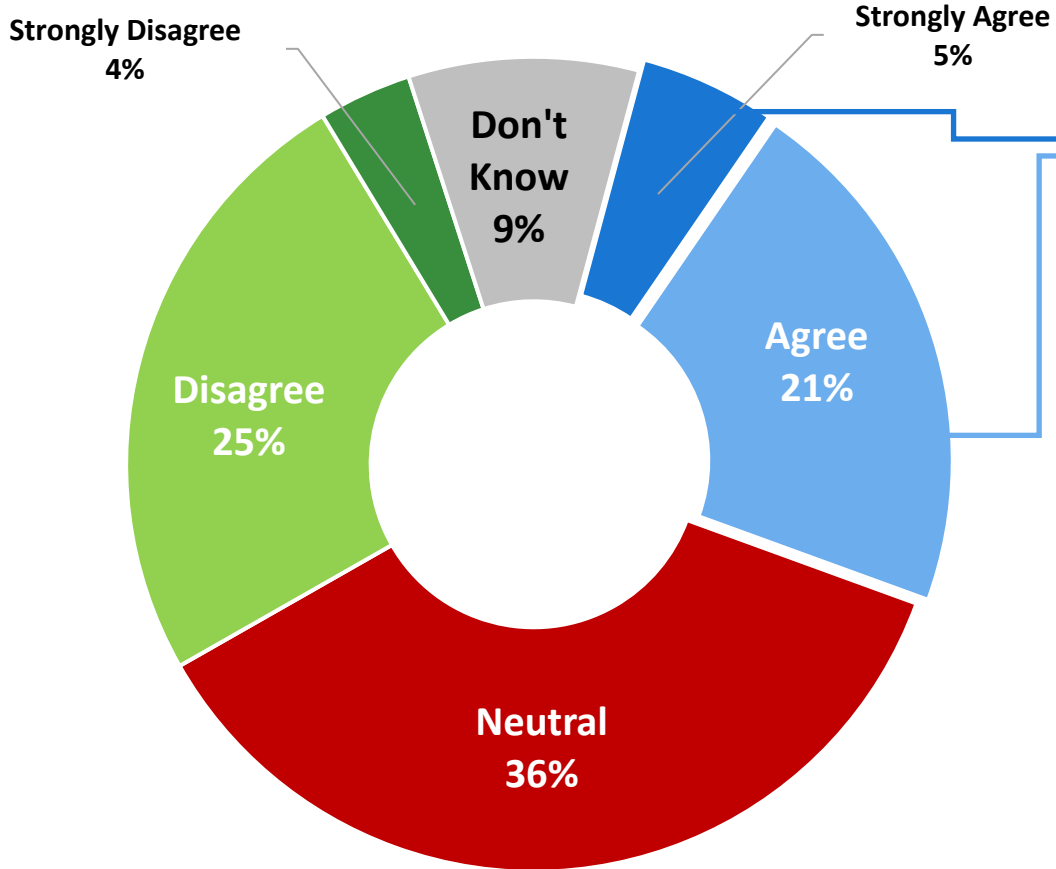
One in Three Are Tuning Into Music Stations More For a Break From the News



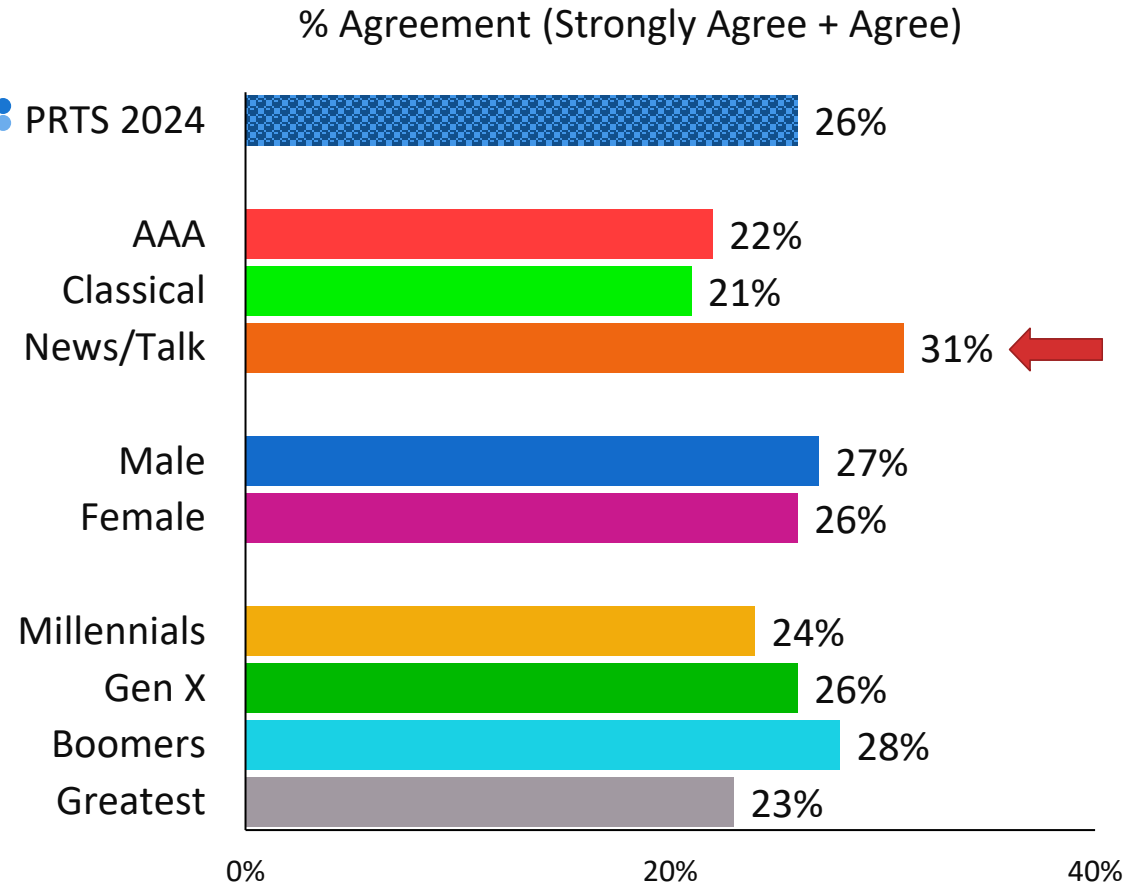
"I am tuning into music radio stations more often than in the past to take a break from the news"



One in Four Says Daily Story/Topic Repetition Is an Issue, Including Nearly One-Third of News/Talk Fans



"The same public radio news stories/topics repeat too often on the same day"





**Public Radio
enjoyed a
“Trump
Bump.” Will
there be a
“Kamala
Klimb?”**



There continues to be strong desire for local news.

IDEAS

A Billion-Dollar Bet on Local News

We're making a \$500 million investment. The other half is up to you.

By John Palfrey



Georgii Pinkhasov / Magnum

Scripps' Bid to Change Local News Moves Ahead, Despite Speedbumps

By Jon Lafayette (Broadcasting & Cable) published September 3, 2024

More reporters may make news better, but will it be good for business?

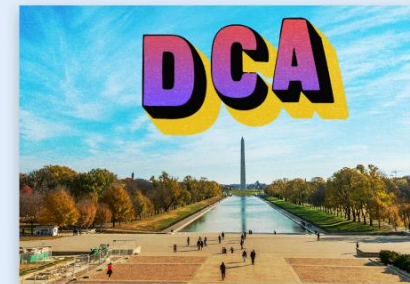
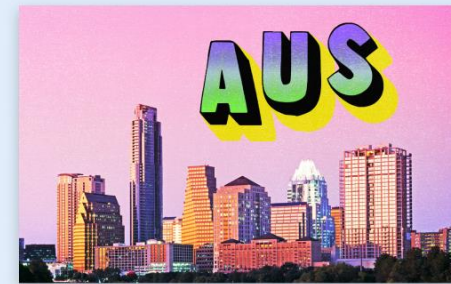


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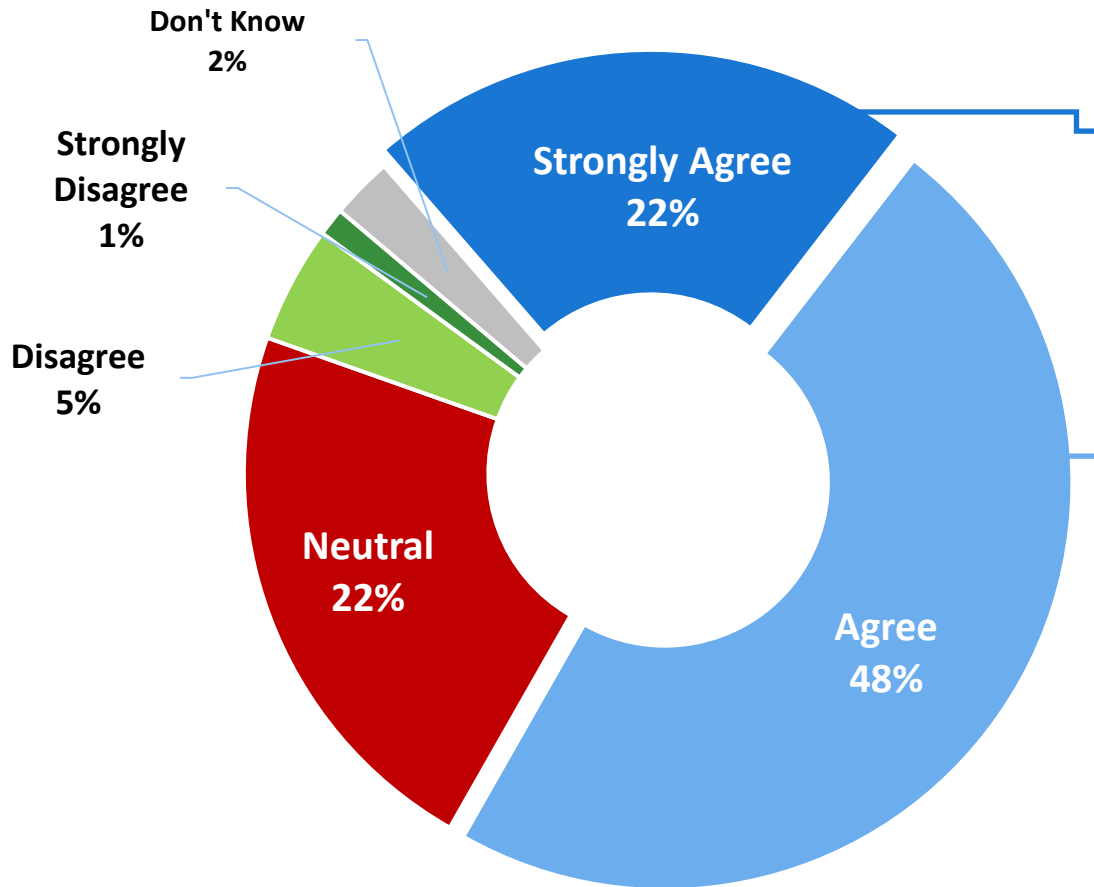


WTXL multimedia journalist Maya Sargent is embedded in a neighborhood in Northwest Tallahassee, Florida. (Image credit: WTXL)

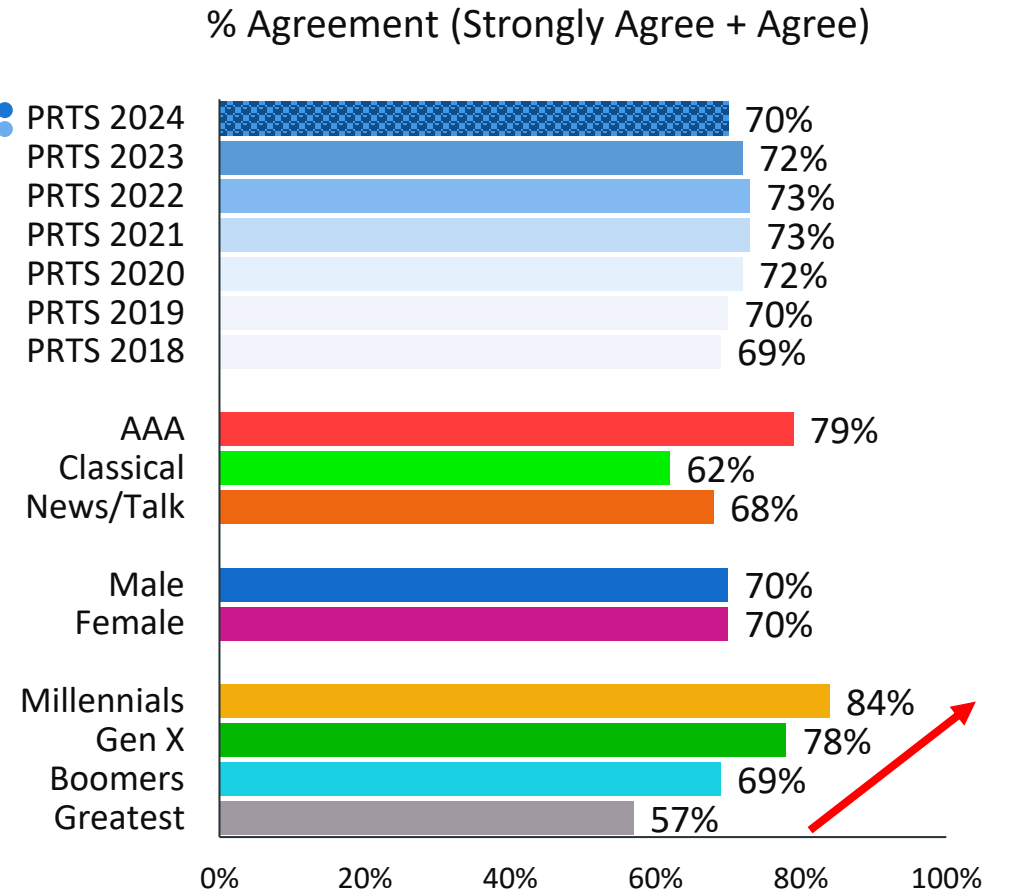
AXIOS LOCAL



A Solid Seven in Ten Respondents View “Local” As a Radio Advantage

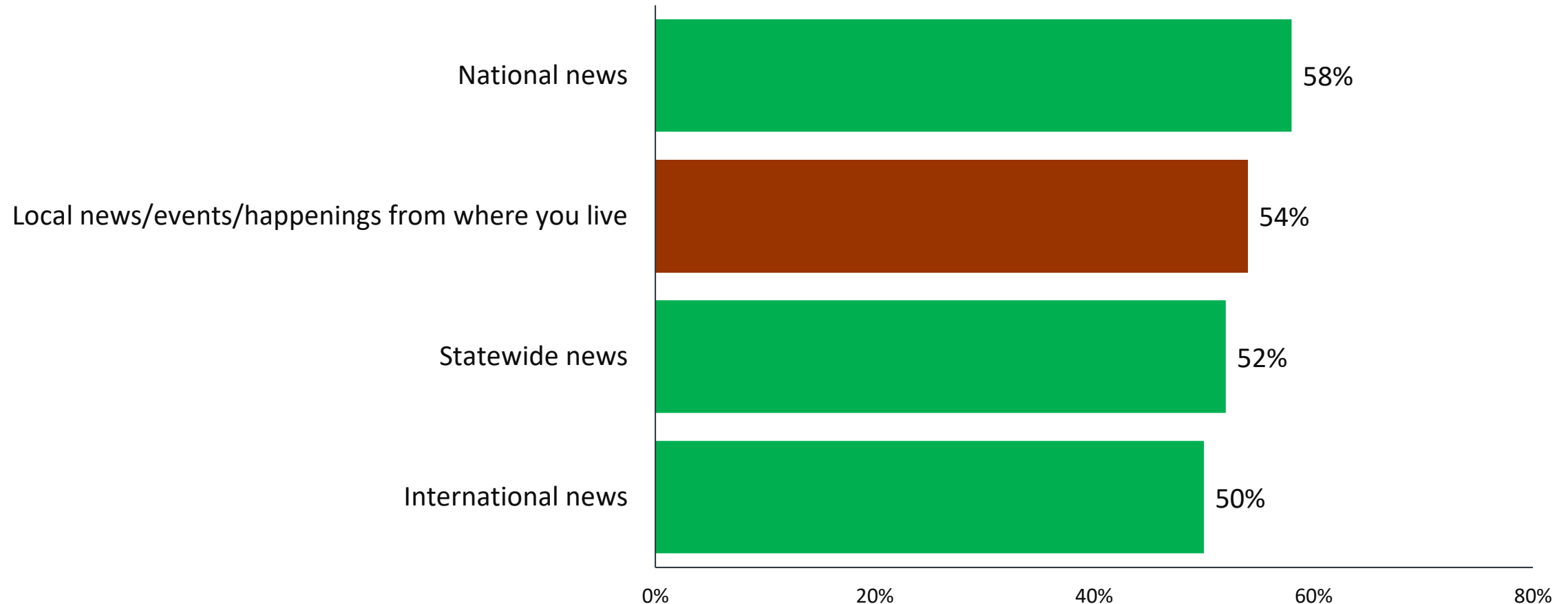


"One of radio's primary advantages is its local feel"

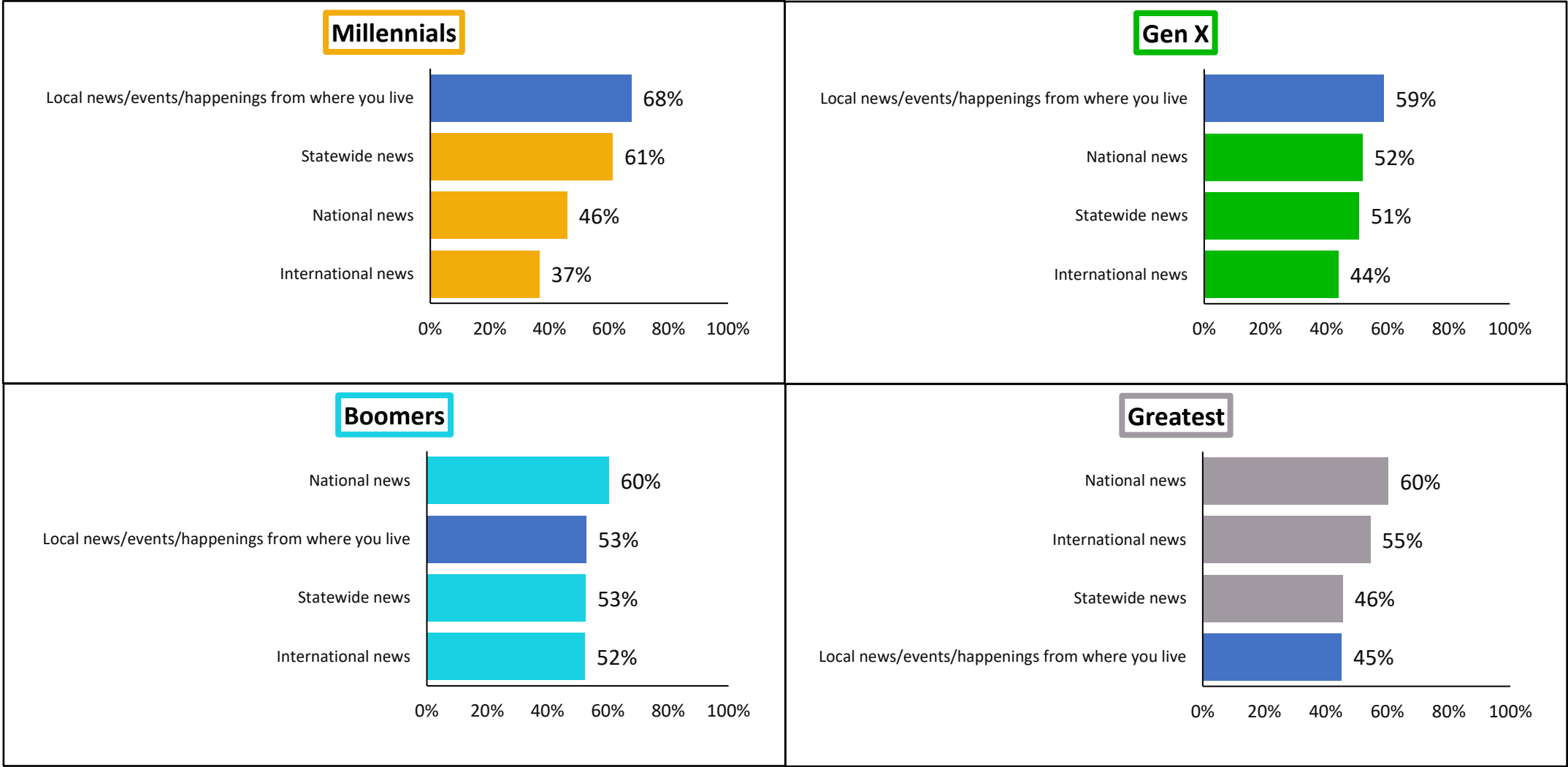


All News Types Are of Interest to a Majority of Respondents, While “Local News/Events” Is a Solid #2

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

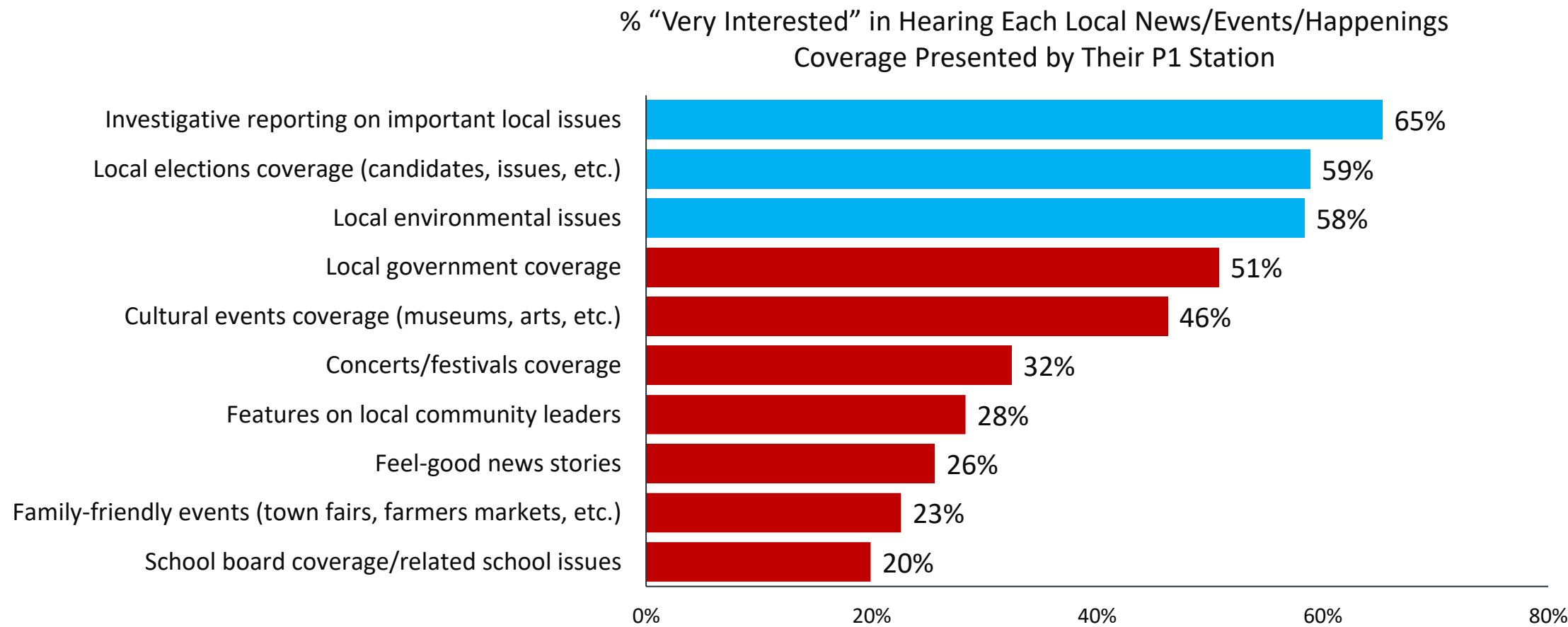


Local News/Events/Happenings Are of Most Interest to Millennials and Gen Xers



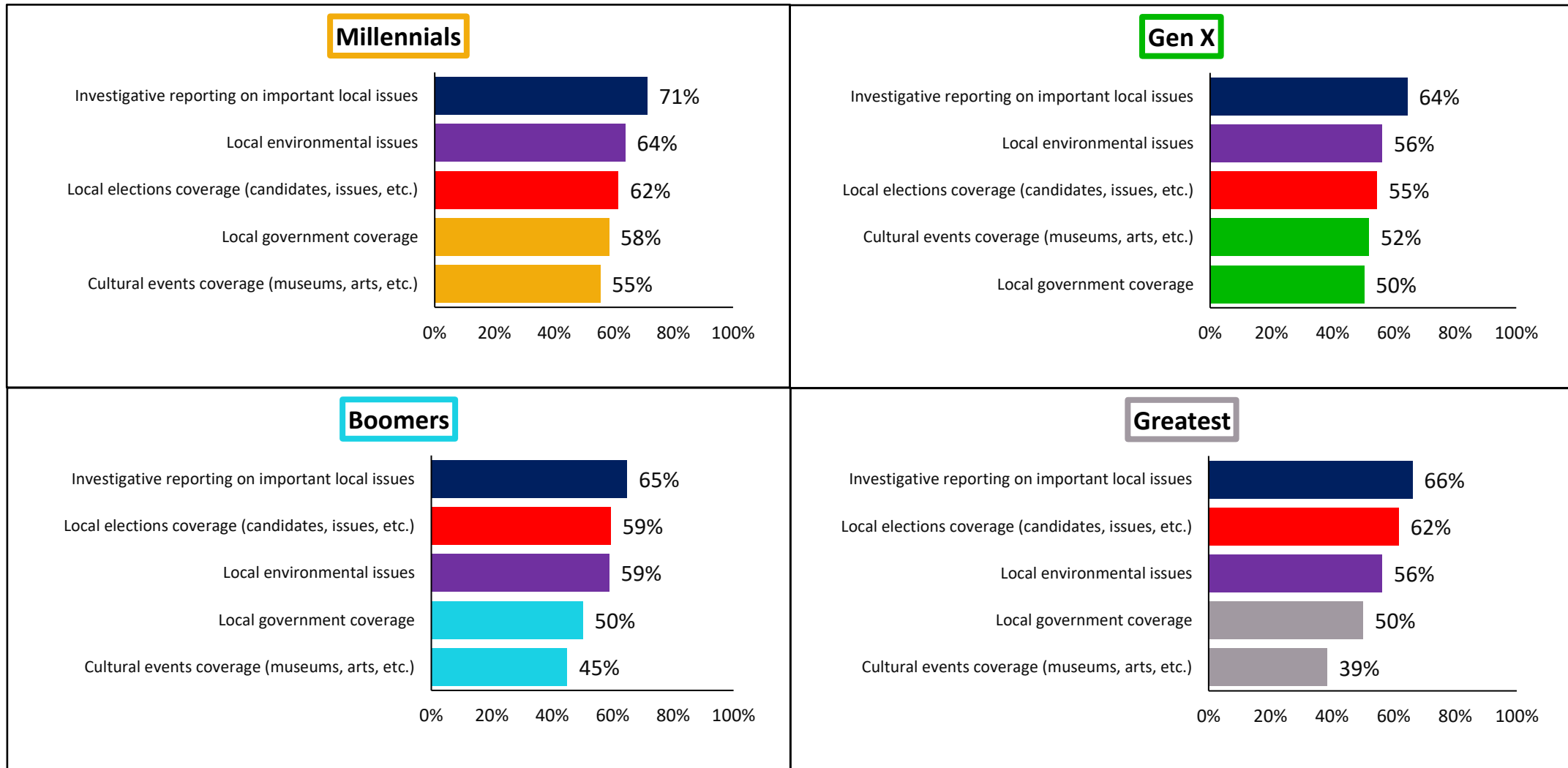
% "very interested" in hearing each news type presented by their P1 station

Investigative Reporting on Local Issues, Local Elections Coverage and Local Environmental Issues Are of Most Interest Among the Coverage Areas Tested



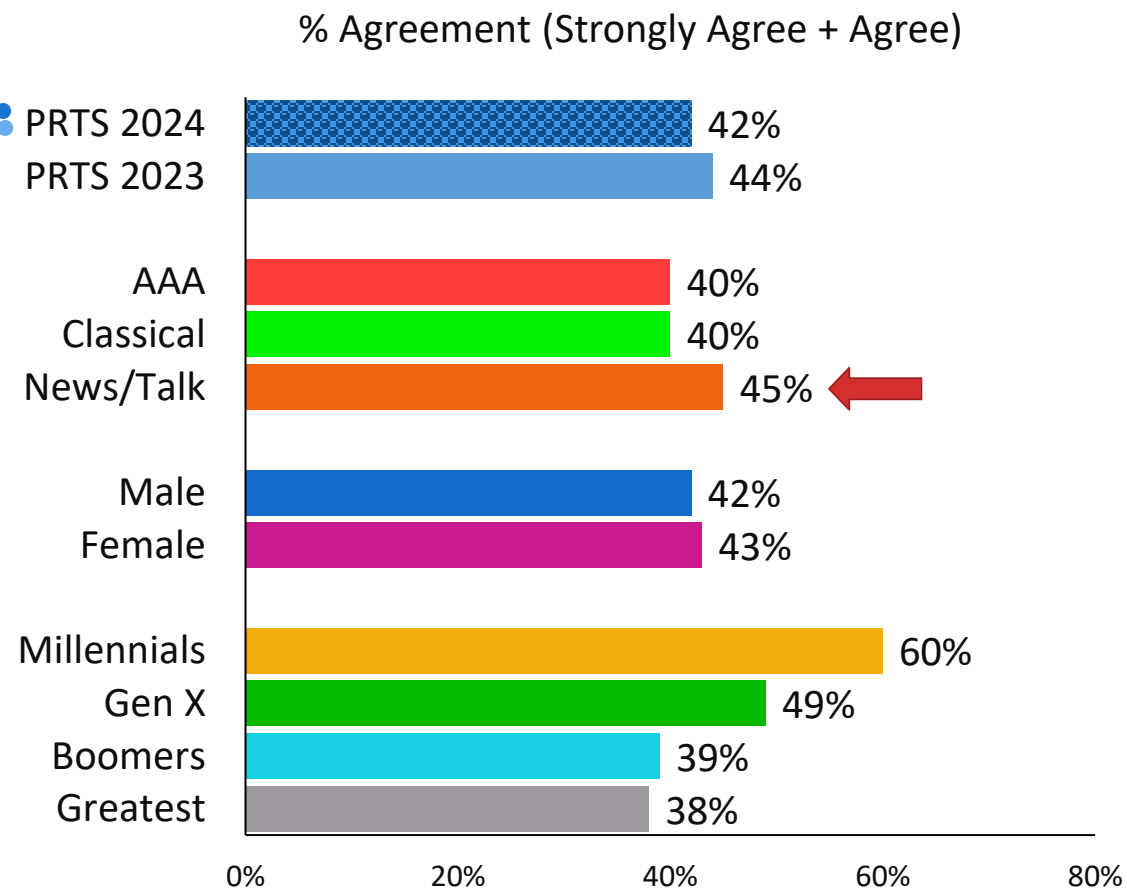
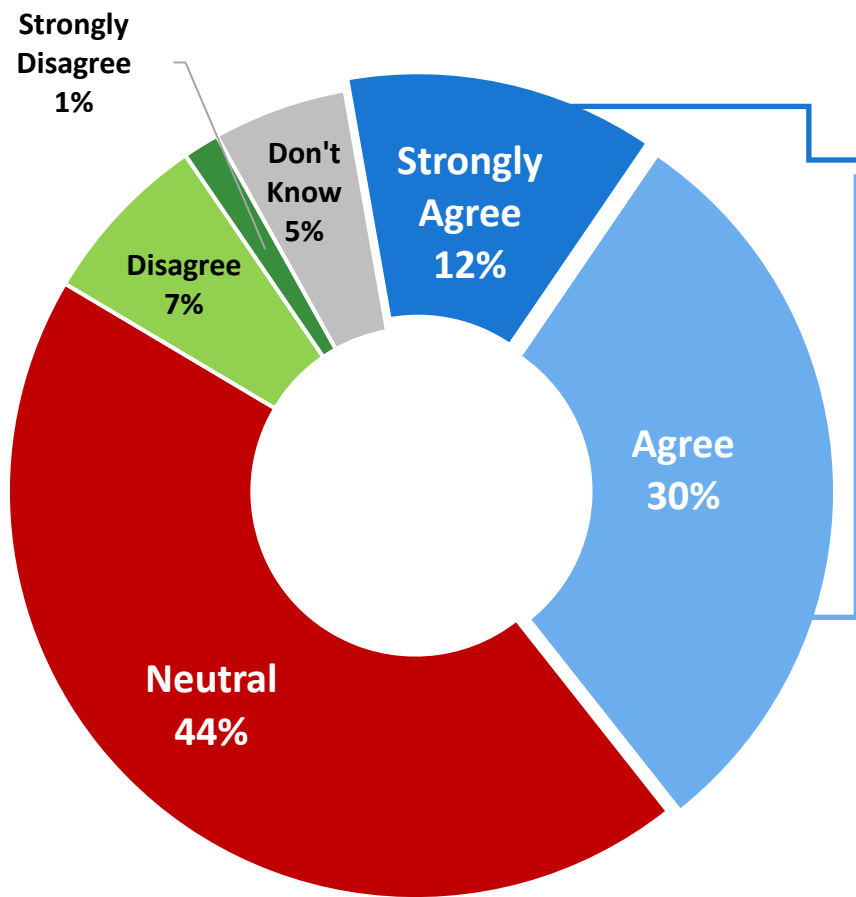
Among those very/somewhat interested in local news/events/happenings coverage presented by P1 station

Across Generations, Investigative Reporting on Local Issues Leads, Followed By the Local Environment and Local Election Coverage



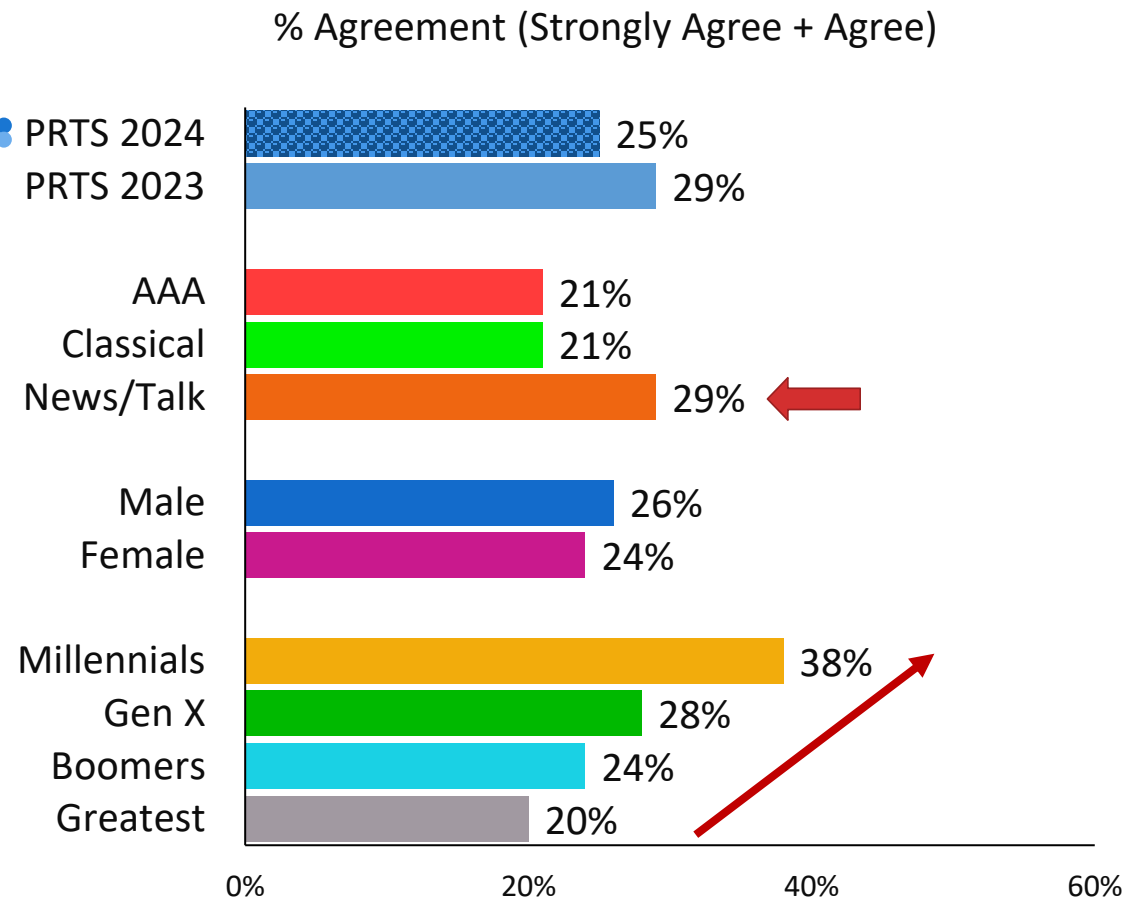
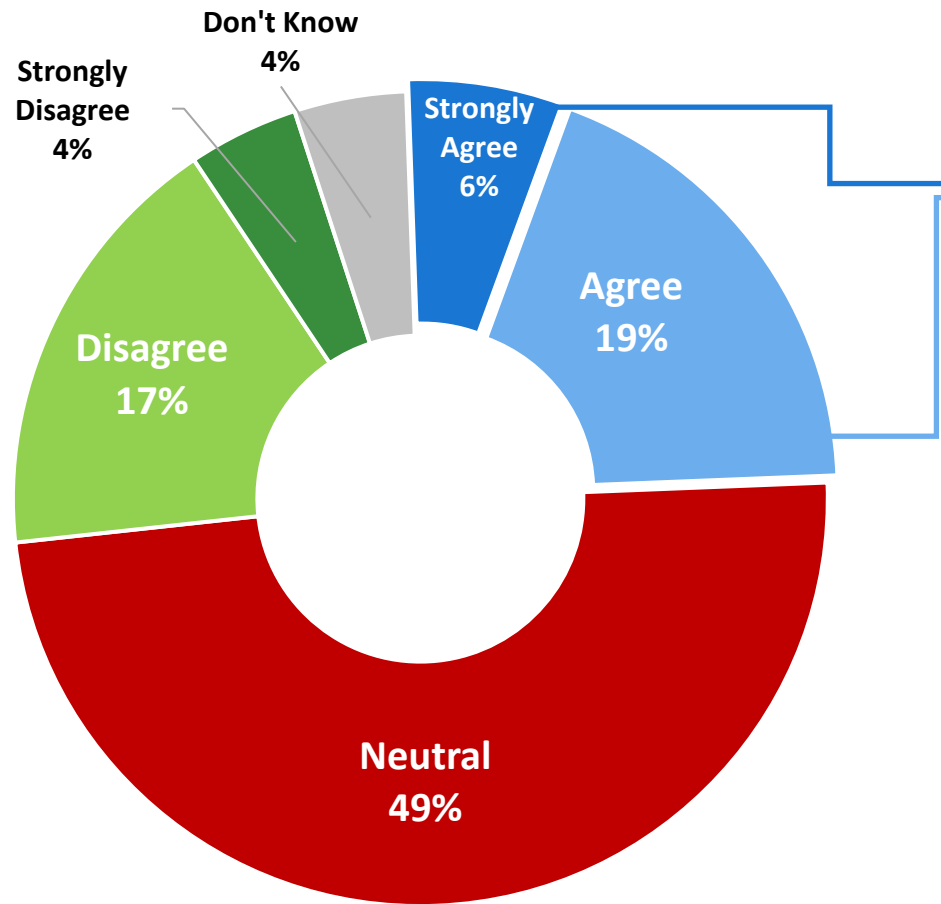
Among those interested (very + somewhat) in local news/events/happenings coverage presented by P1 station, % "very interested" in hearing each presented by their P1 station (top 5 items shown among those asked)

There Is Support For Greater Visibility in the Local Communities For Public Radio Stations, Especially for Core News/Talk Partisans



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

One in Four Wants More Locally-Produced Programming From Their Favorite Public Radio Station, Led By News/Talk Fans

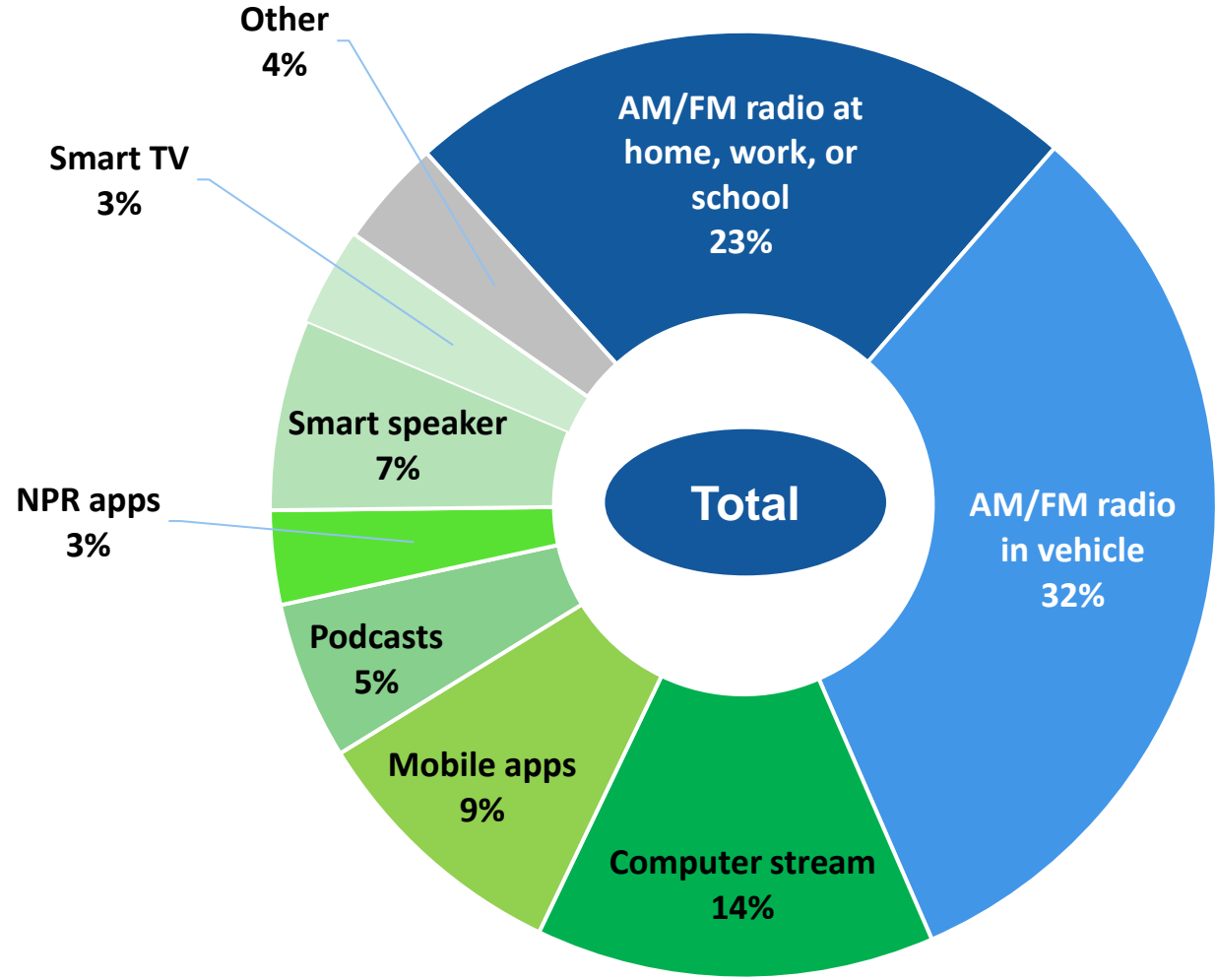


"I wish THE STATION THAT SENT ME THIS SURVEY was able to produce more locally originated programming content"



The digital
revolution
enjoys a
major bump
in PRTS 2024.

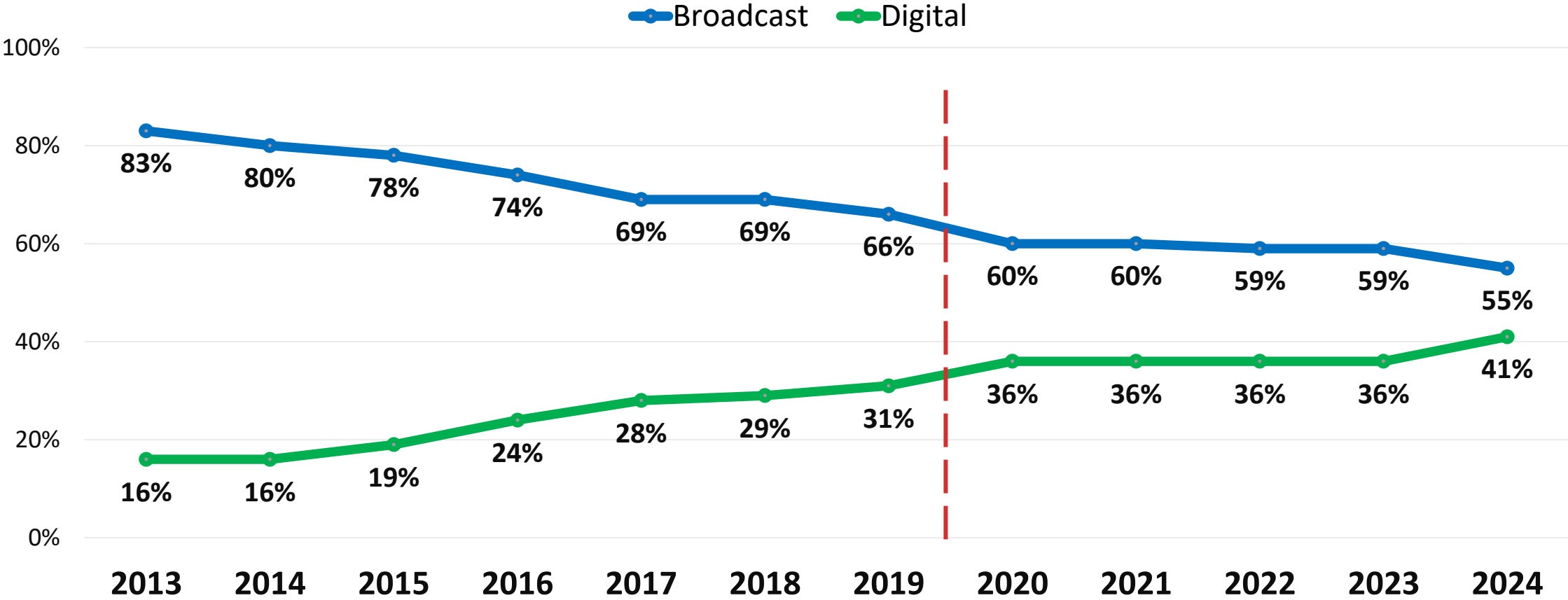
How Do Public Radio Fans Listen to Their Favorite Stations?



Broadcast – 55%
Digital – 41%

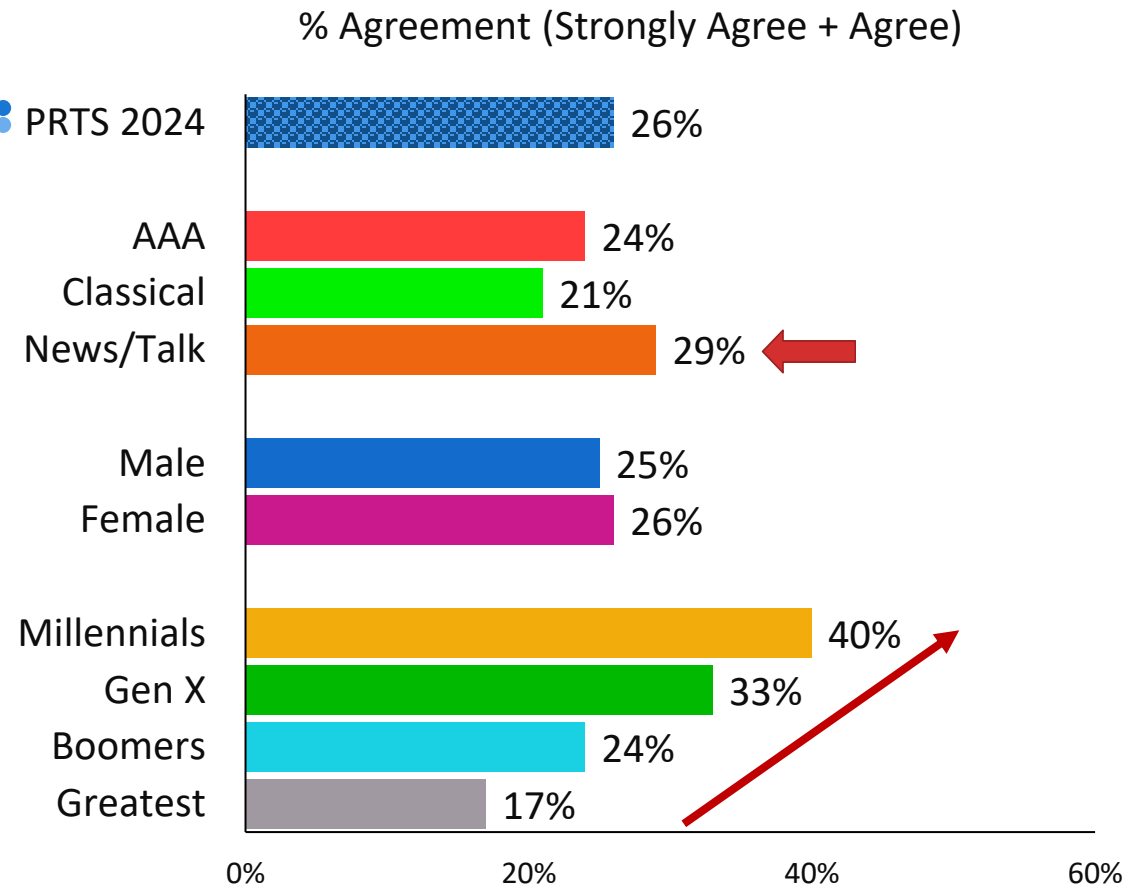
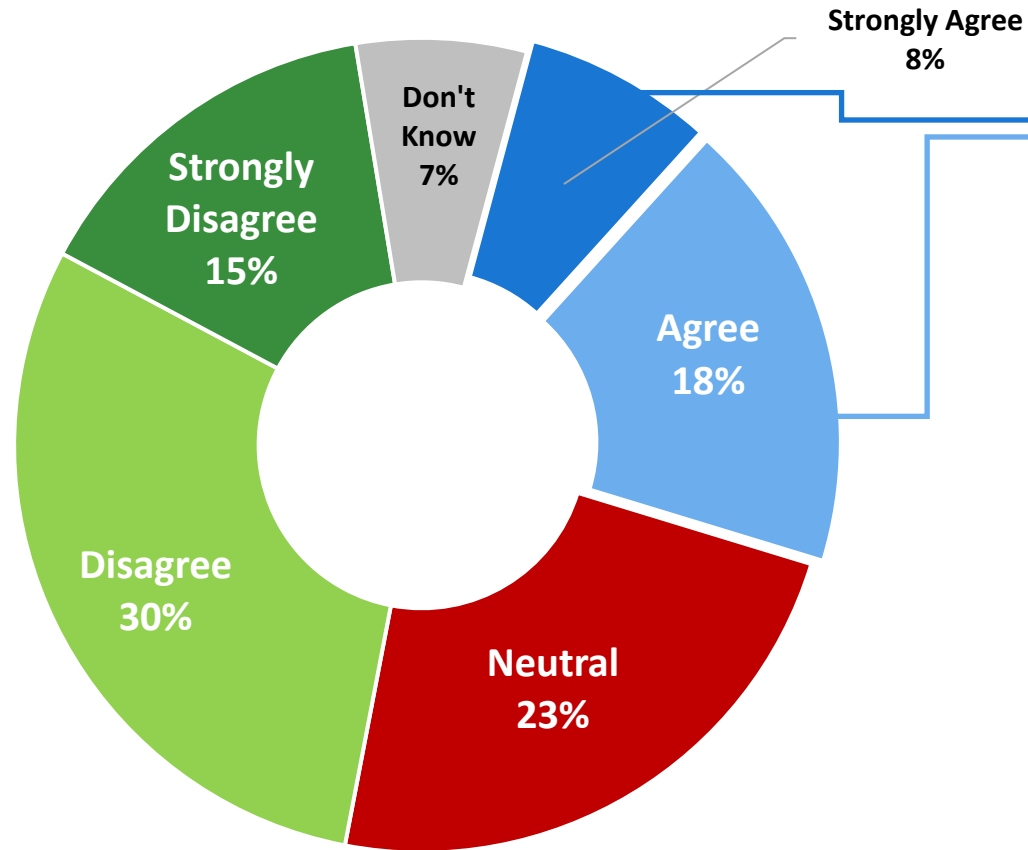
PRTS 2023
Broadcast – 59%
Digital – 36%

P1 Station Listening Platforms: Broadcast vs. Digital



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

One in Four Says They Now Time-Shift Their Public Radio Listening, Especially Core Fans of News/Talk Stations

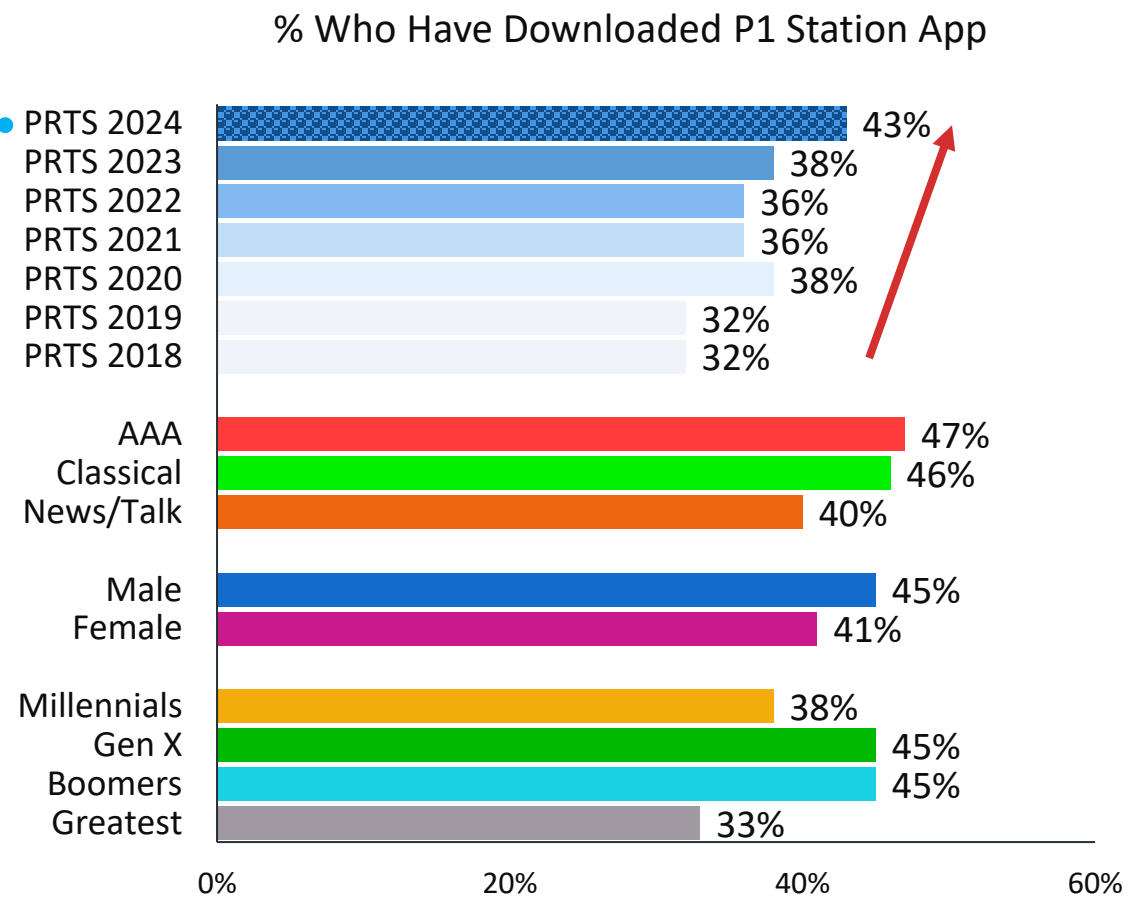
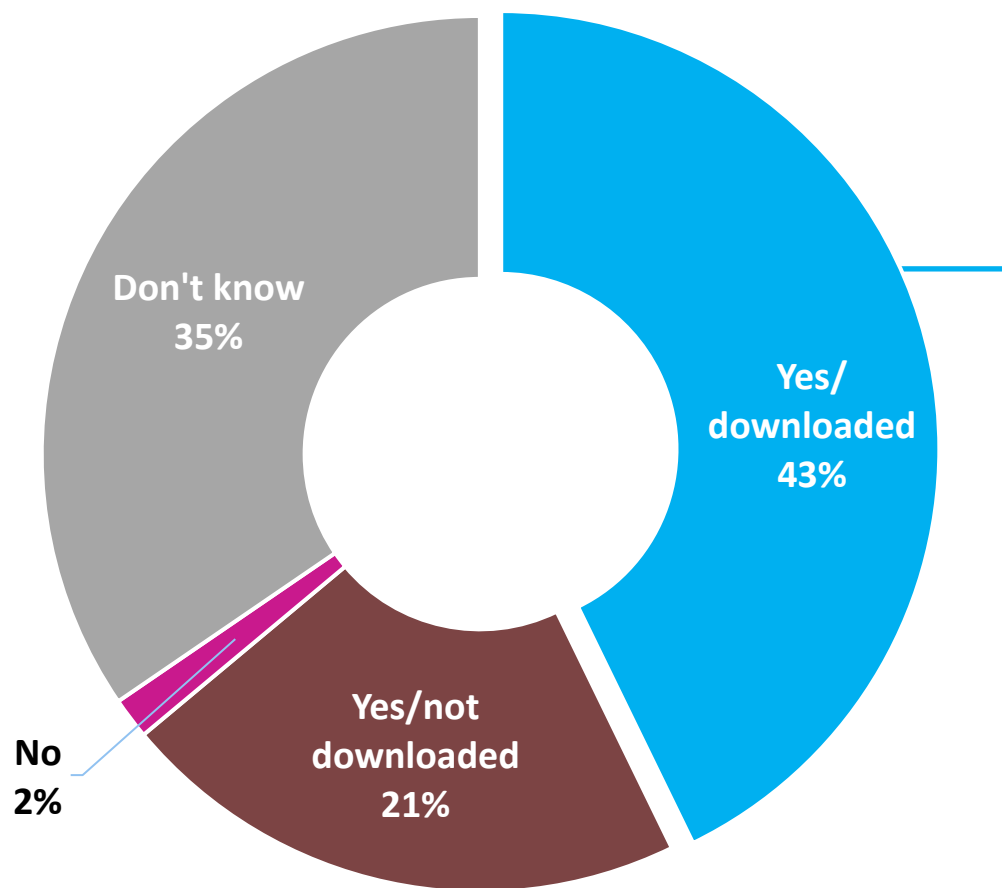


"I find myself time-shifting/listening to public radio programs/content on-demand so I can listen whenever it's convenient"

7

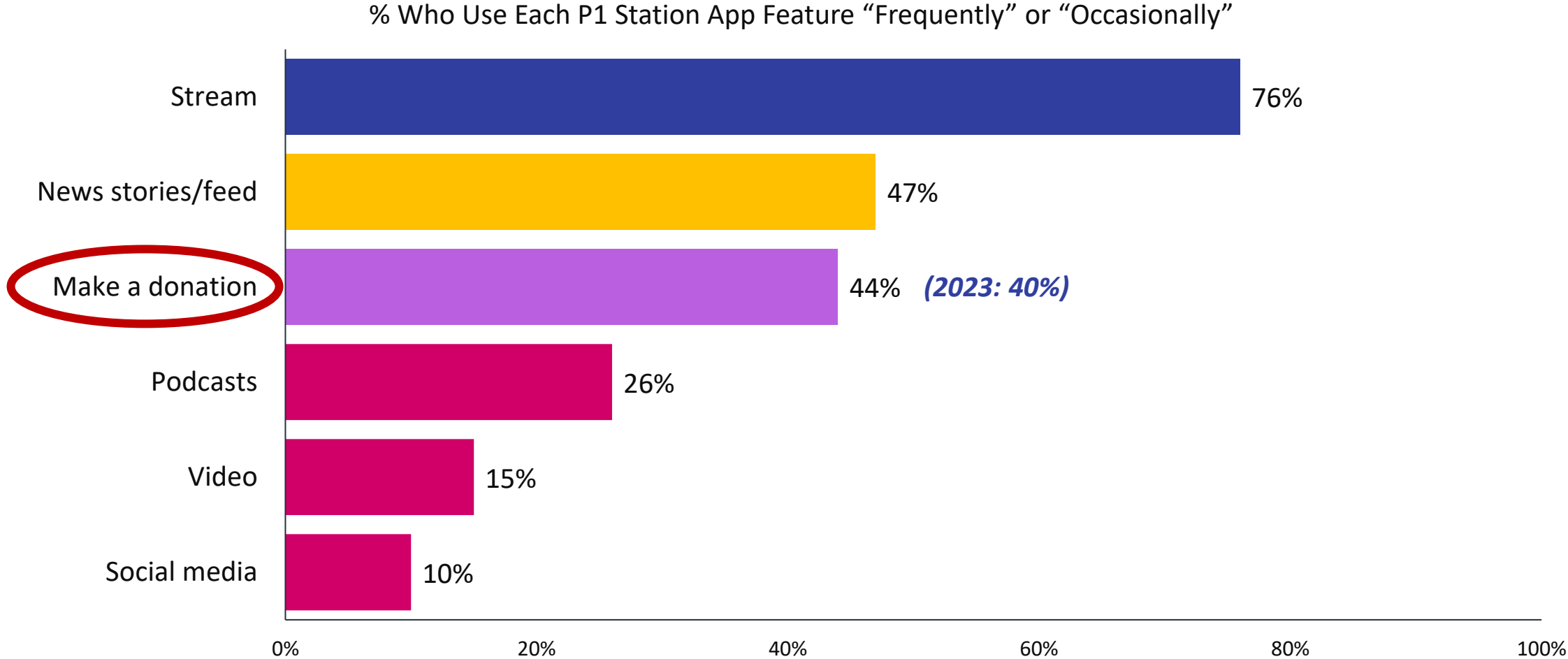
**Mobile
continues to
play a key role
in Public Radio
content
consumption.**

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



Among smartphone and/or tablet owners

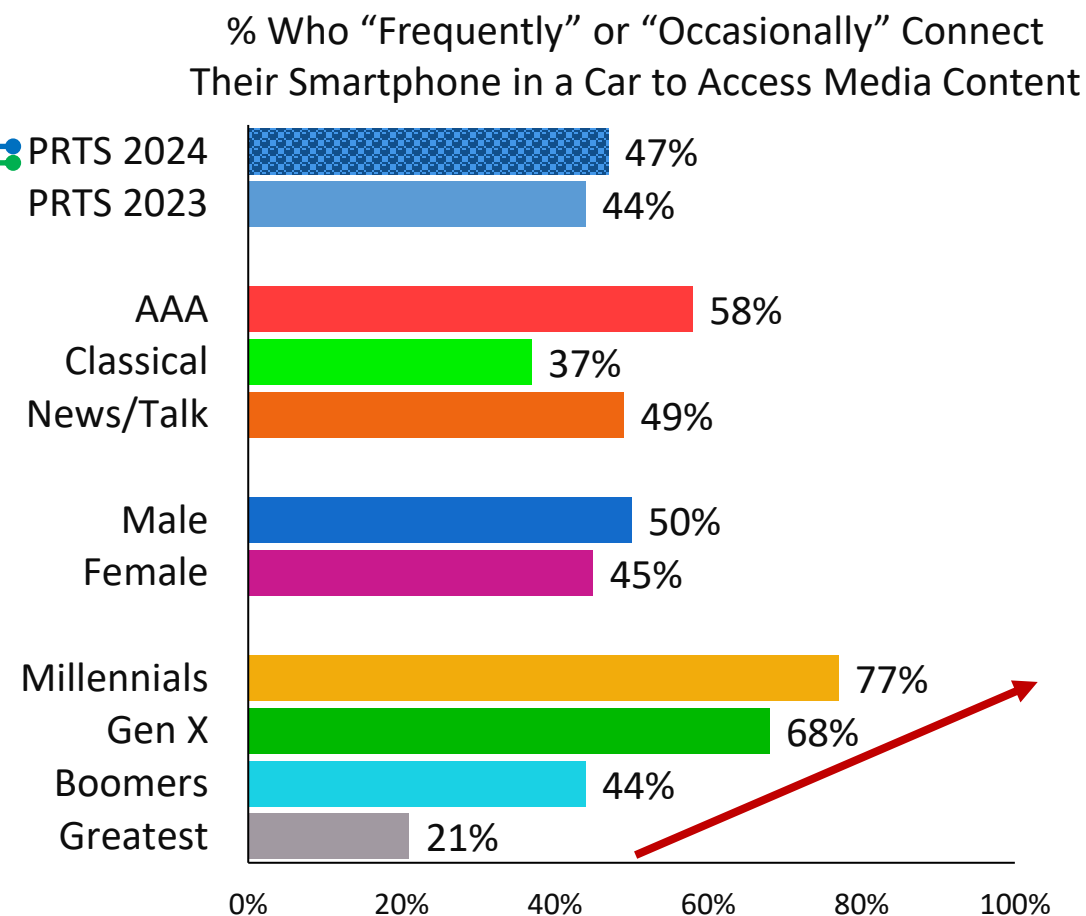
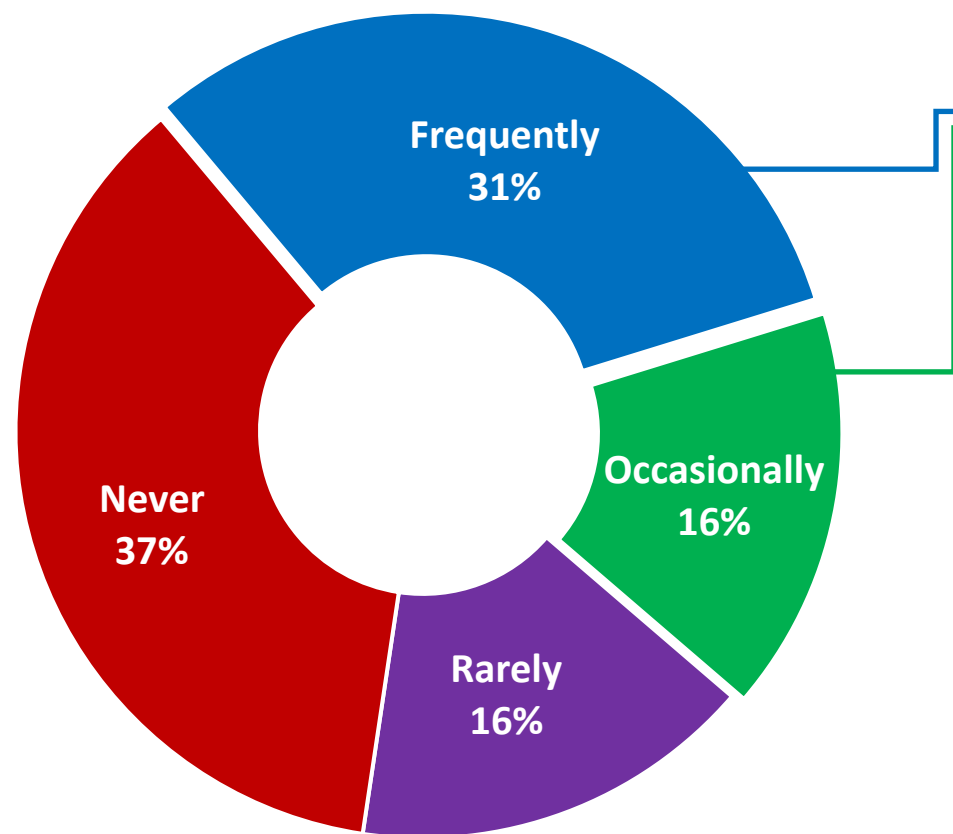
The Stream Is the Most Used Feature Among Those Who Have Their P1 Station's App, Followed By the News Feed and Donations



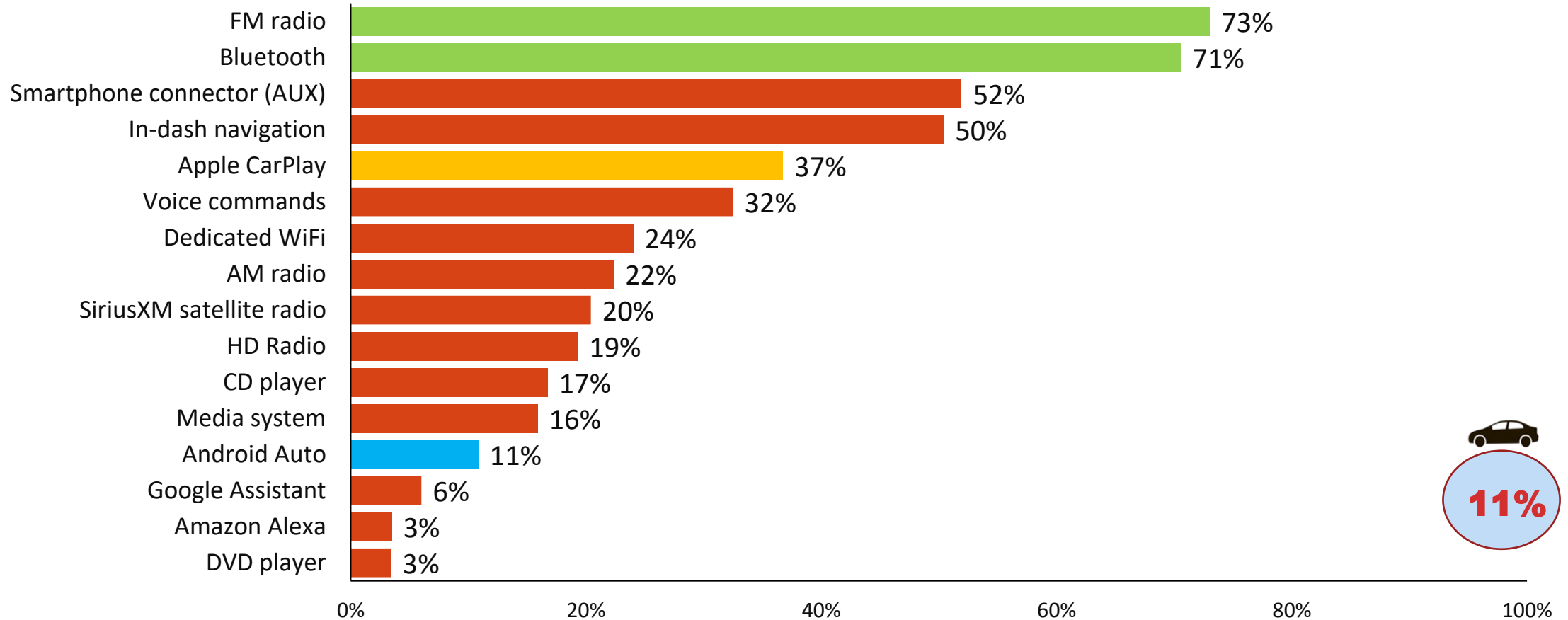


The more connected the car, the more broadcast radio's dominance in the car is challenged.

Almost Half Now Connect Their Smartphone to the Car at Least Occasionally to Access Media Content; Millennials and Gen Xers Connect Most

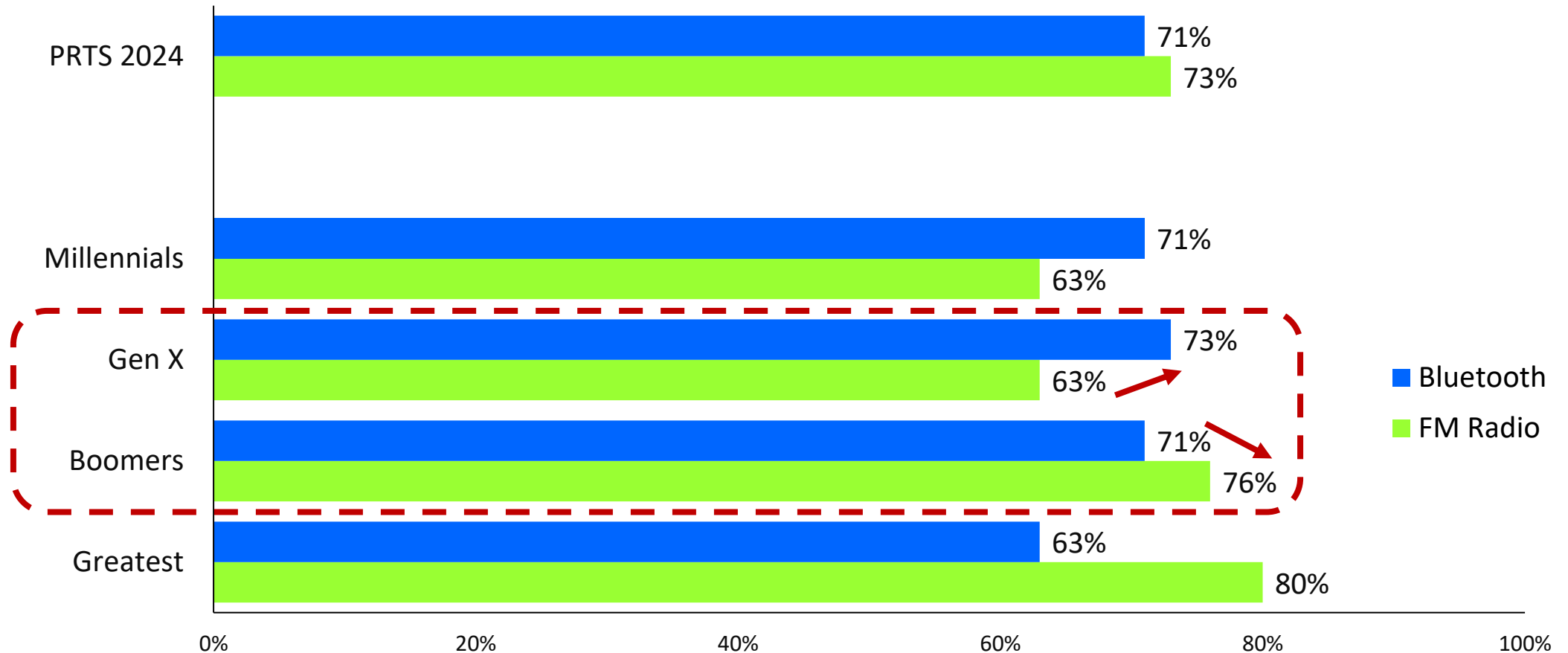


FM Radio and Bluetooth Remain as the Most Important Features Among New Car Buyers



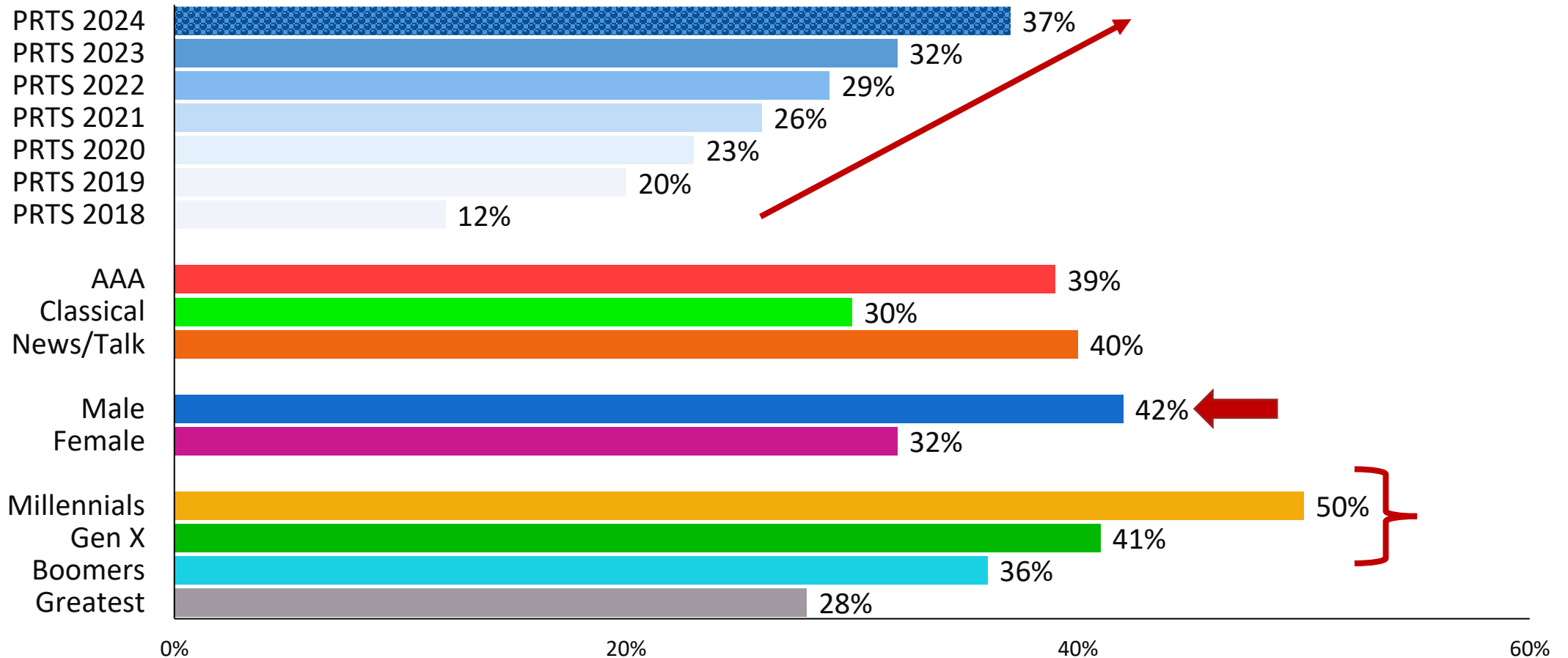
“Very Important” features among those planning on buying/leasing (or already bought) a new vehicle in 2024

Among New Car Buyers, Gen Xers Prioritize Bluetooth Over FM, While Boomers Are Desirous of the Opposite



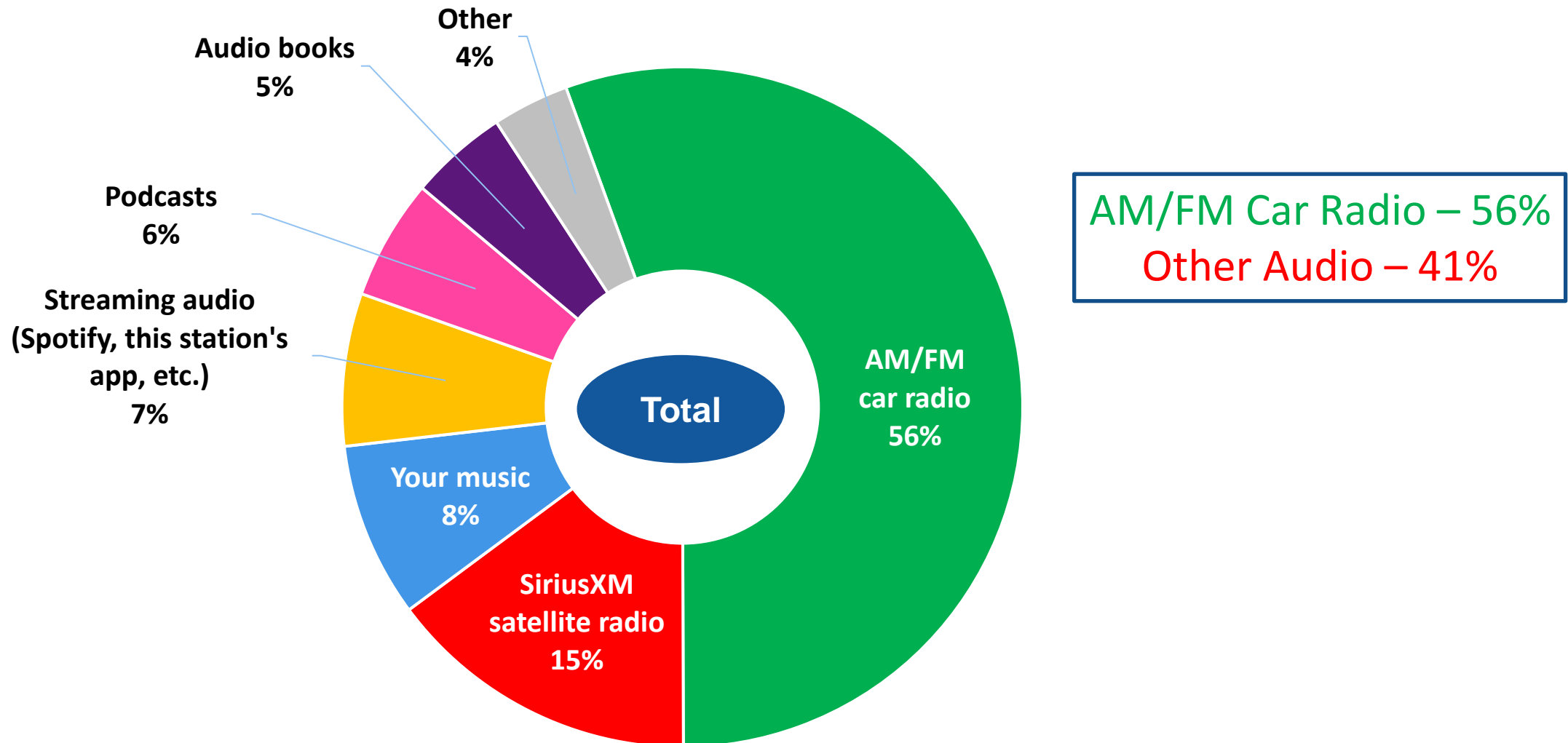
“Very Important” features among those planning on buying/leasing (or already bought) a new vehicle in 2024

Apple CarPlay Continues to Rise in Importance Among New Car Buyers, Driven By Men, and Gens Y and X

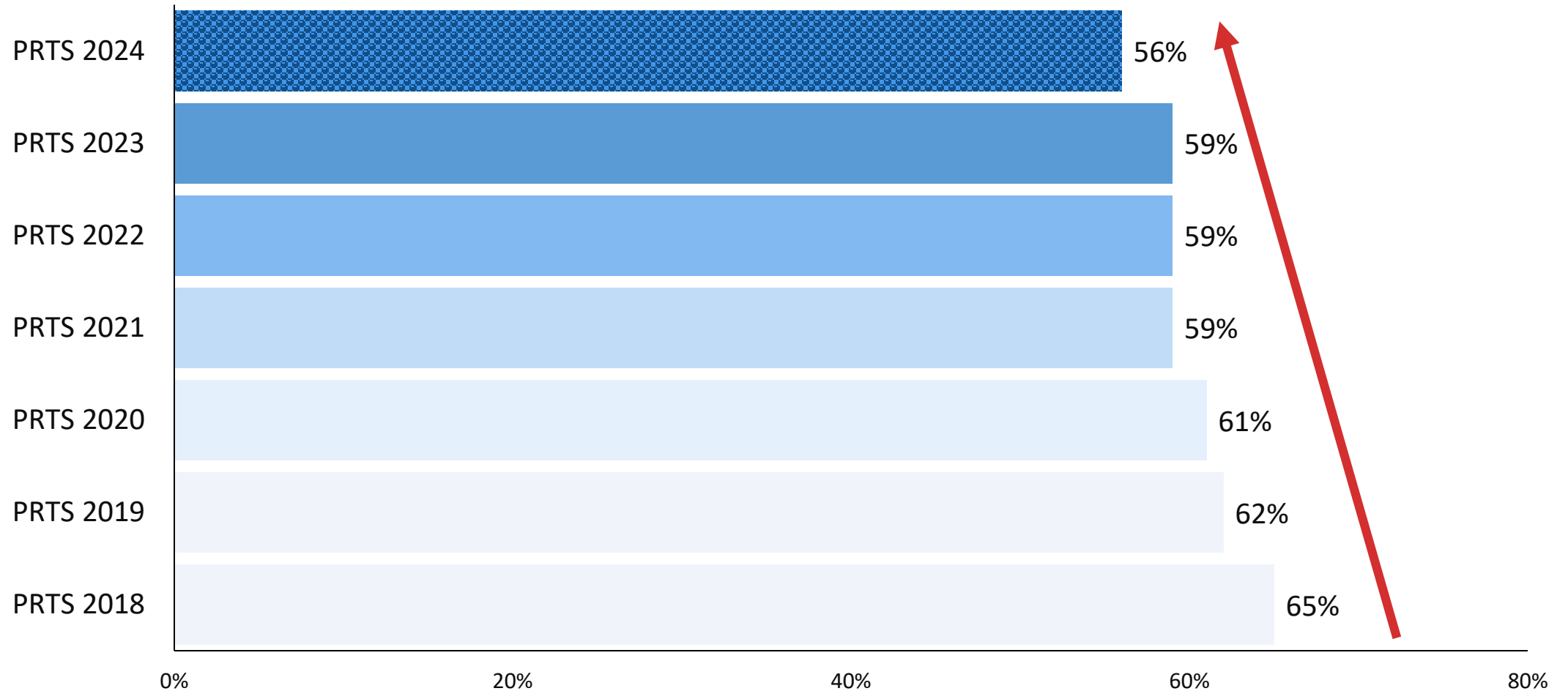


Among those planning on buying/leasing (or already bought) a new vehicle,
% saying Apple CarPlay is a “very important” feature

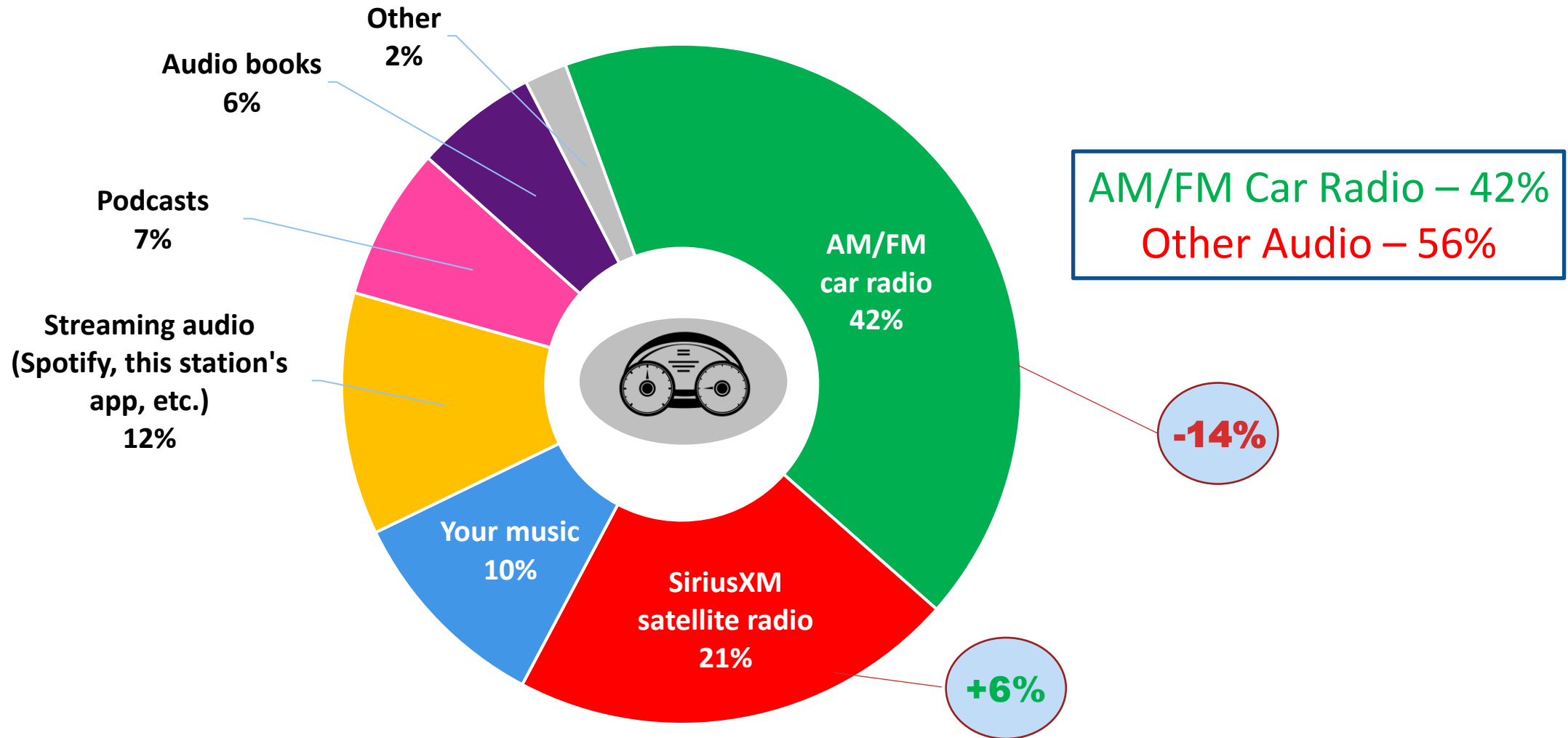
Broadcast Radio Continues Its In-Car Audio Dominance



In-Car AM/FM Radio Listening At Its Lowest Point Ever



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



Thinking About Your Radio Station As a Content Platform

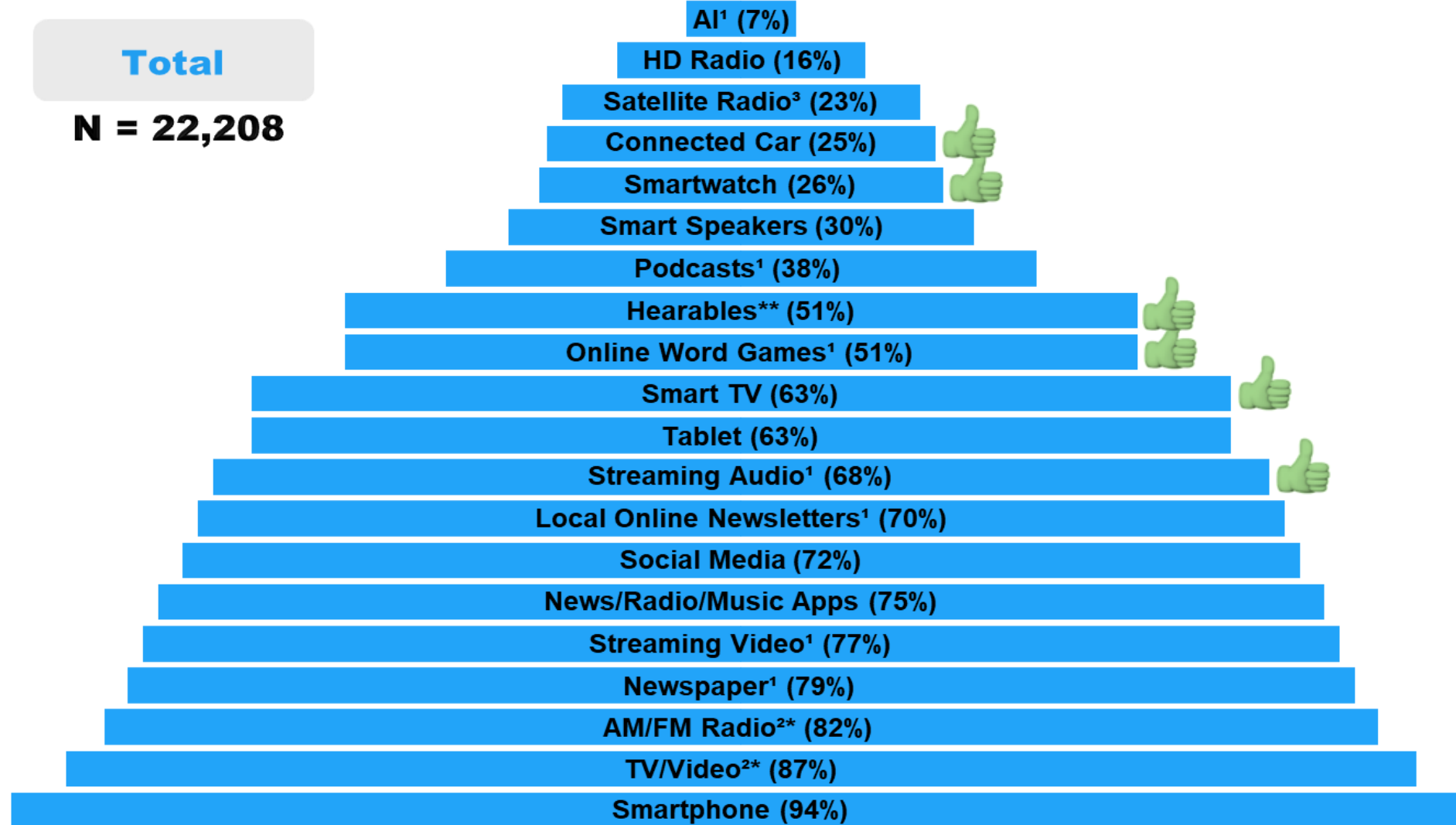




Media Pyramid 2024

Total

N = 22,208



Total
PRTS 2023

16%

23%

22%

21%

31%

39%

47%

47%

59%

64%

65%

69%

72%

74%

75%

80%

83%

86%

93%

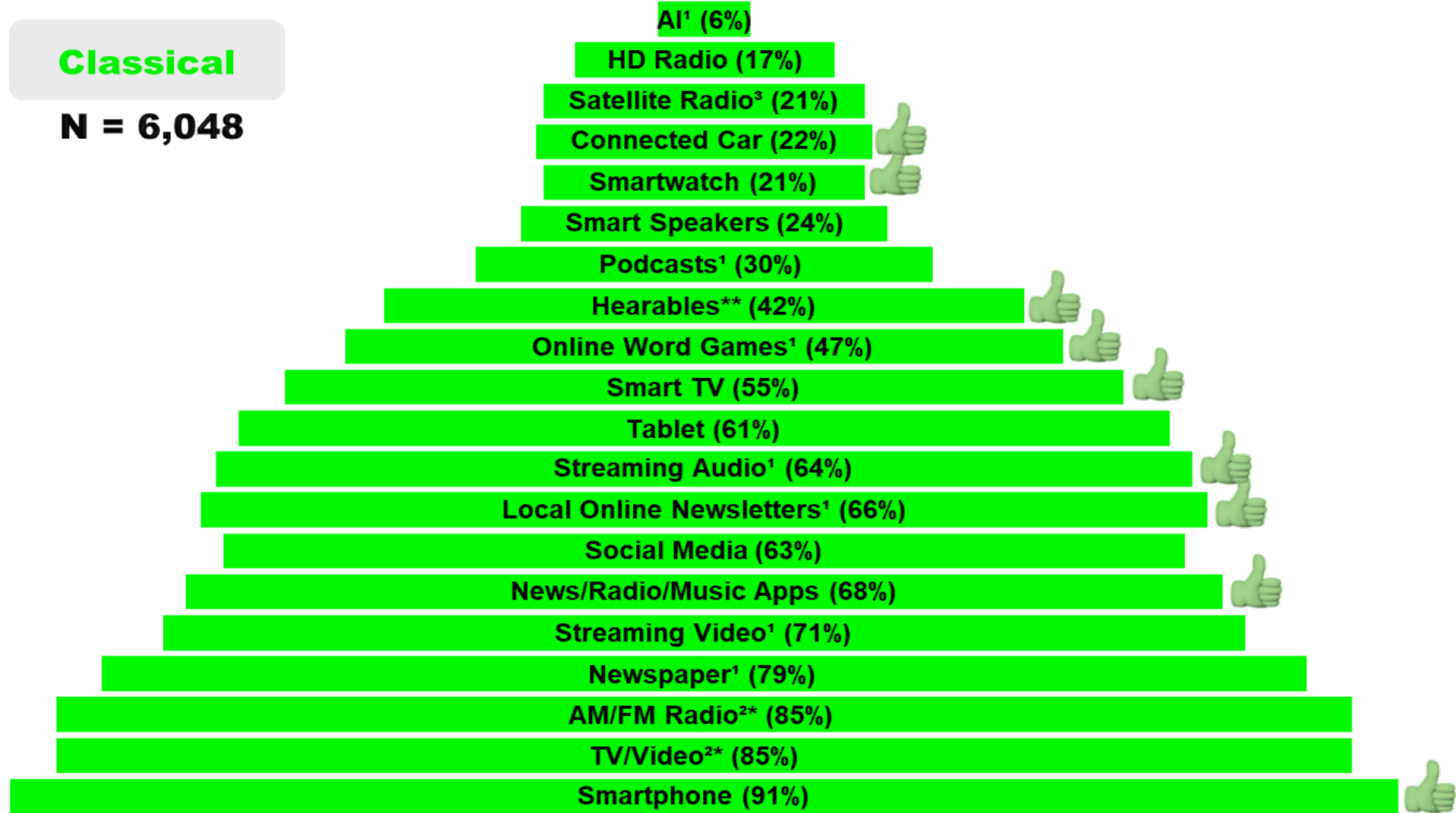
¹ Weekly or more ² 1+ hour per day ³ Paid & trial users *Any platform/device **Wireless headphones/earbuds



Media Pyramid 2024

Classical

N = 6,048



Classical
PRTS 2023

18%

20%

19%

15%

24%

28%

37%

41%

50%

60%

61%

63%

63%

65%

69%

80%

86%

83%

88%

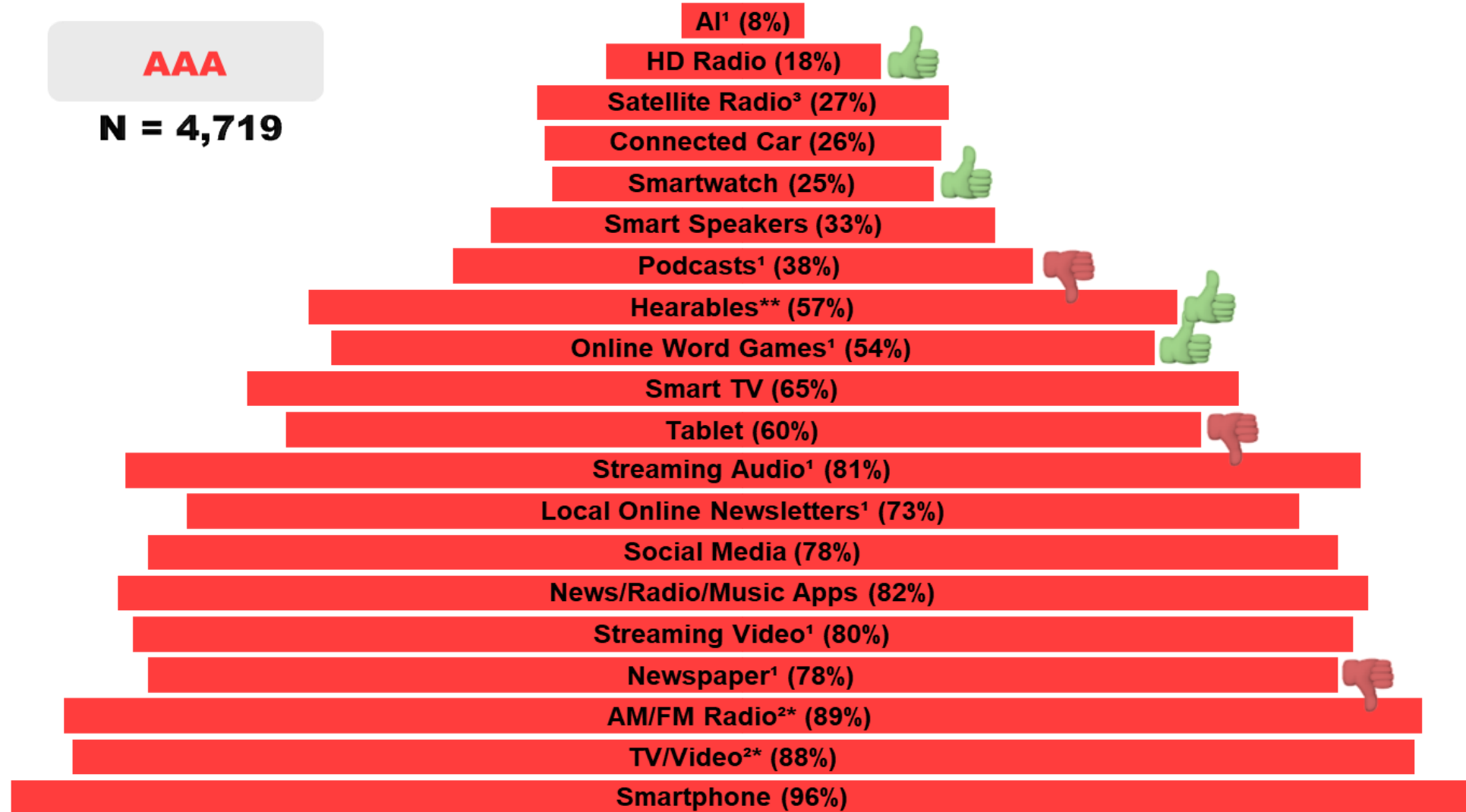
¹ Weekly or more ² 1+ hour per day ³ Paid & trial users *Any platform/device **Wireless headphones/earbuds



Media Pyramid 2024

AAA

N = 4,719



AAA
PRTS 2023

15%
28%
24%
20%
33%
42%
54%
49%
63%
63%
79%
72%
77%
83%
81%
81%
87%
87%
96%

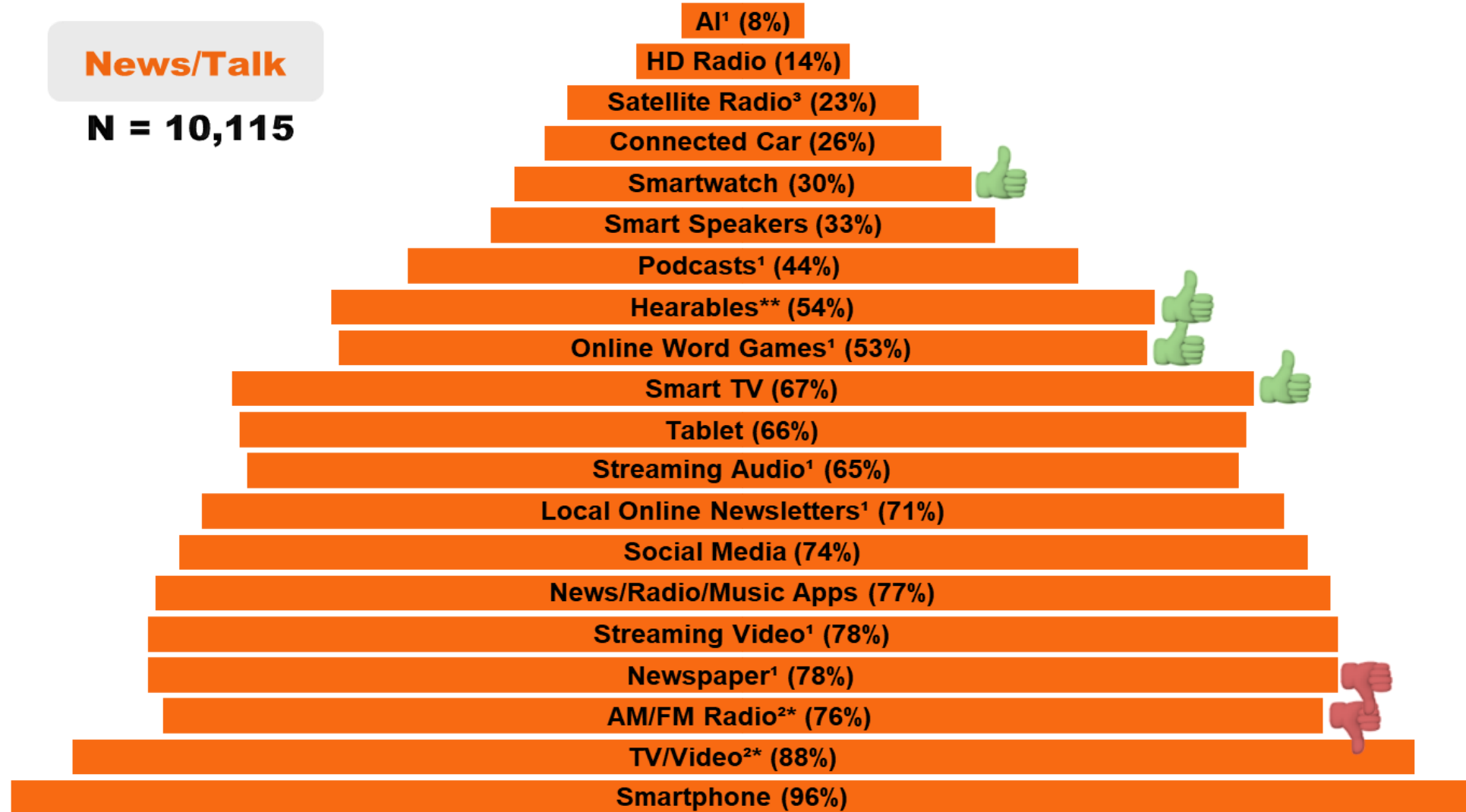
¹ Weekly or more ² 1+ hour per day ³ Paid & trial users *Any platform/device **Wireless headphones/earbuds



Media Pyramid 2024

News/Talk

N = 10,115



News/Talk
PRTS 2023

15%
23%
24%
24%
34%
44%
51%
50%
64%
67%
63%
72%
75%
77%
78%
81%
79%
88%
95%

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

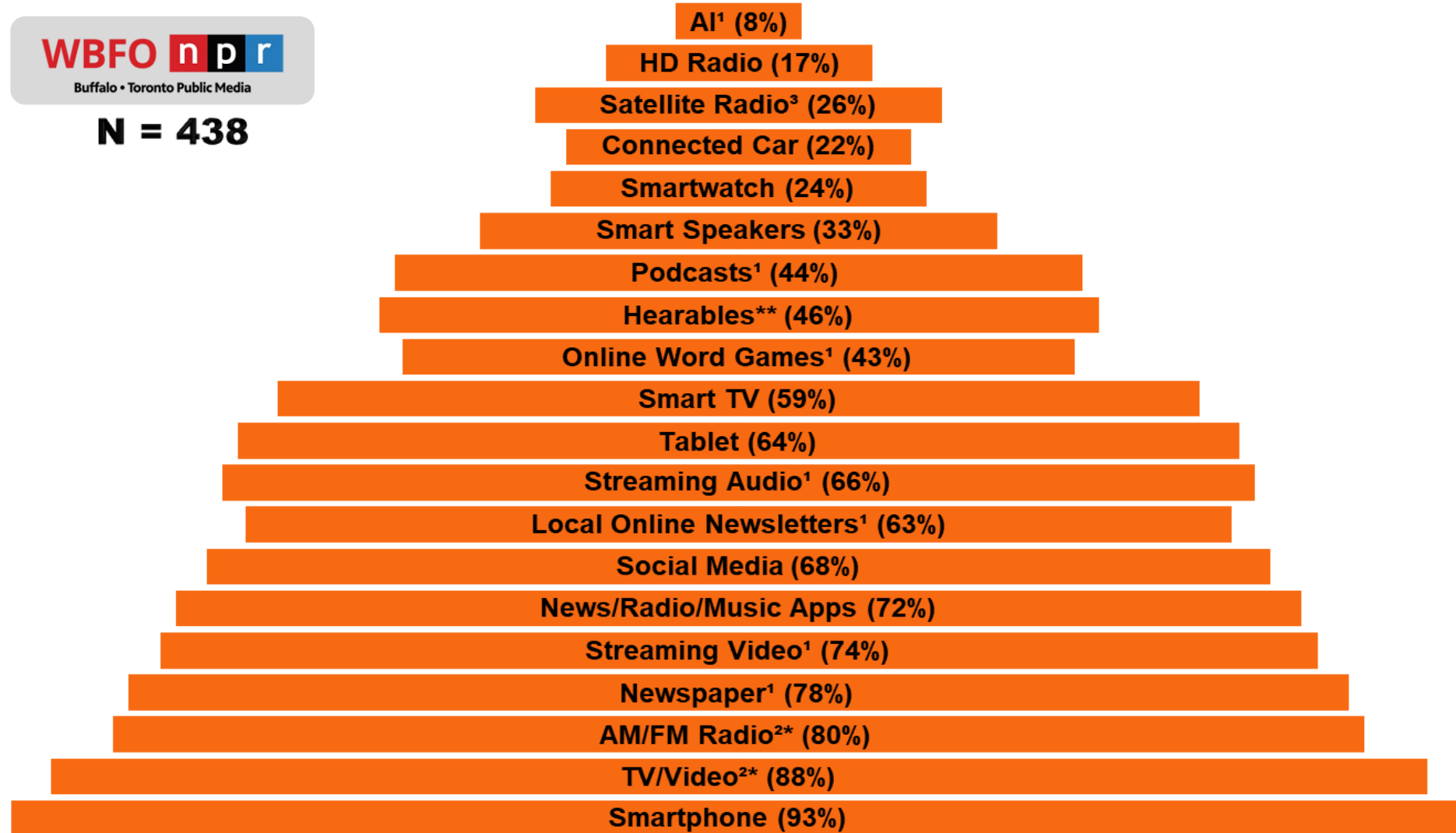


Media Pyramid 2024

WBFO n p r

Buffalo • Toronto Public Media

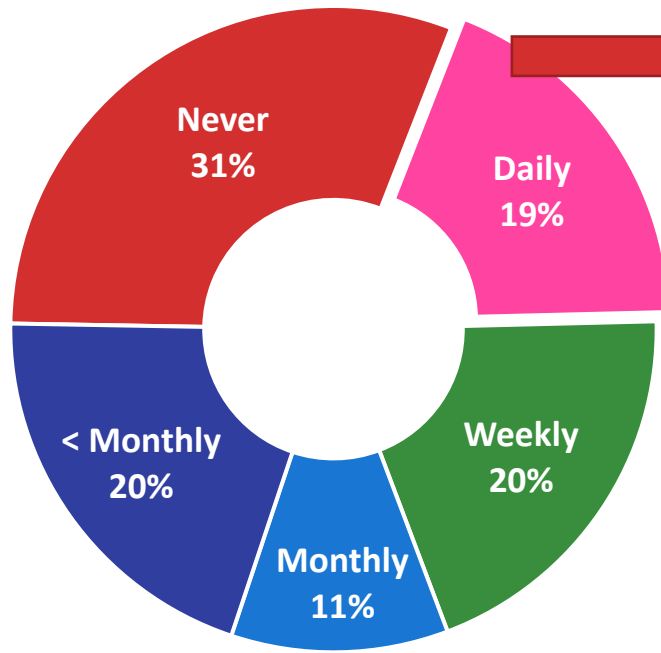
N = 438



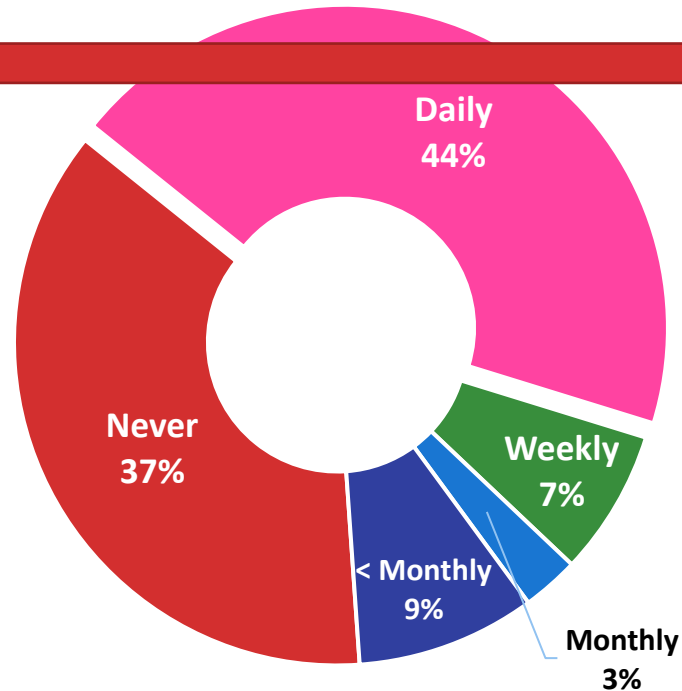
¹ Weekly or more ² 1+ hour per day ³ Paid & trial users *Any platform/device **Wireless headphones/earbuds

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

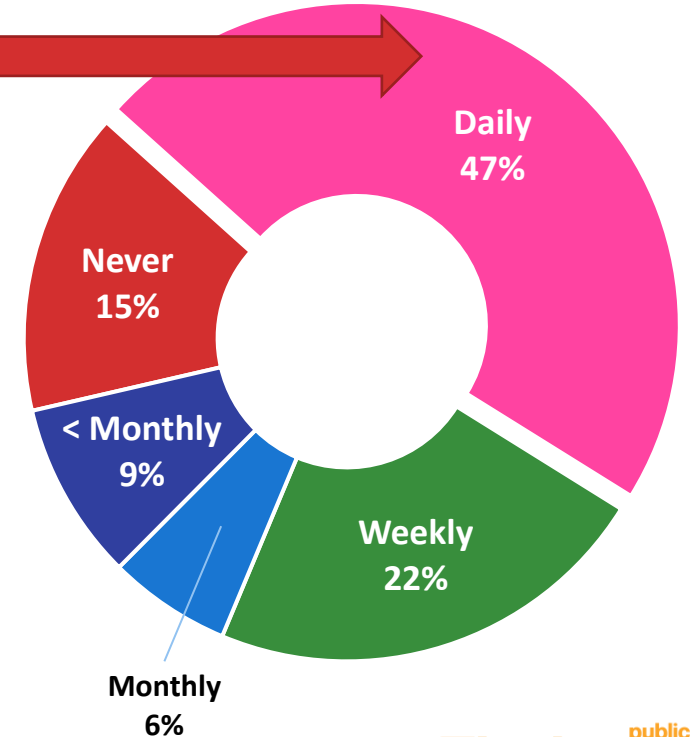
Listen to podcasts



Play online word games



Read local online newsletters

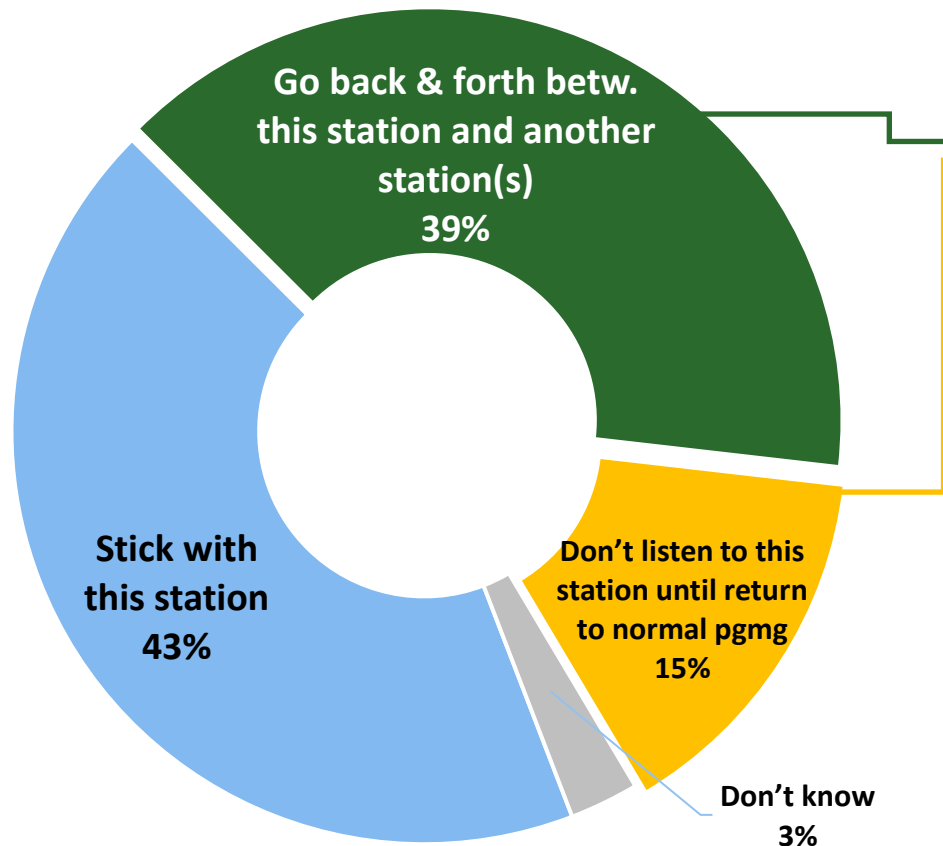


9

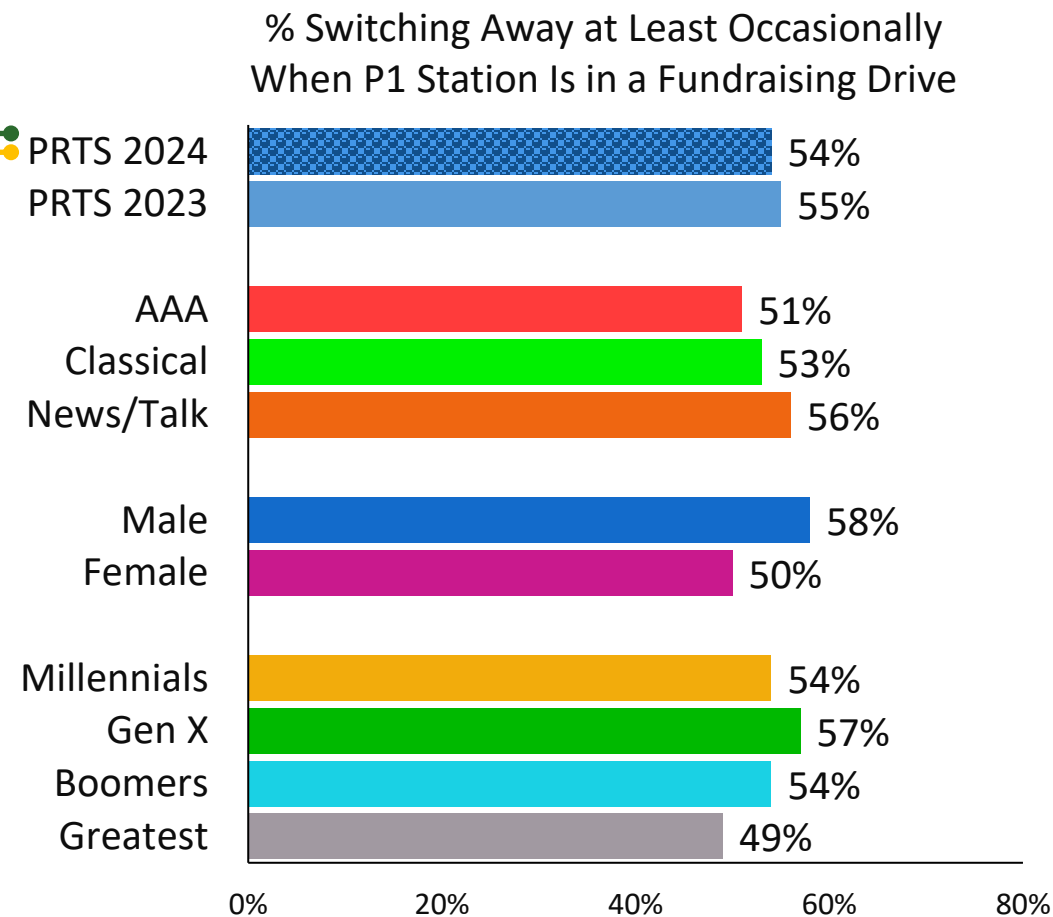


Public Radio's current fundraising model remains problematic, repelling core listeners. Is there an option?

Fundraising Drive Tune-out Is Across-the-Board, Impacting a Majority of Public Radio Core Fans

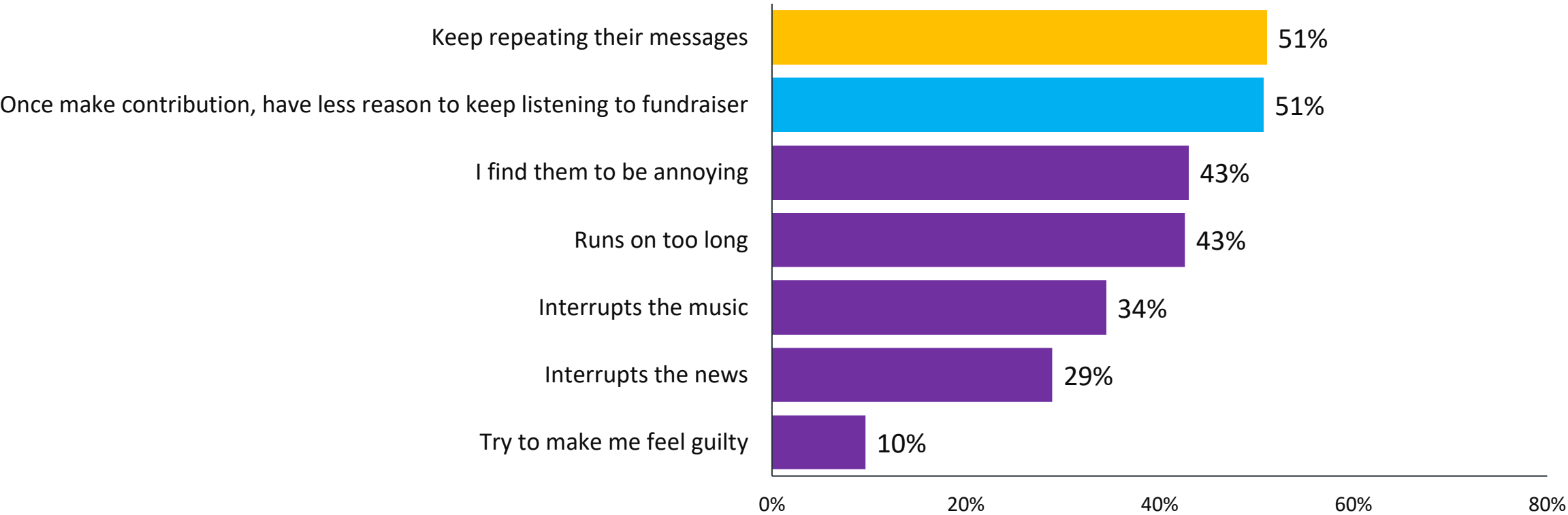


"When THE STATION THAT SENT YOU THIS SURVEY is in a fundraising drive, which of the following best describes how you listen?"



What Causes the Most Tune-Out? Repetitive Messaging and Having Already Contributed to Current Fundraiser

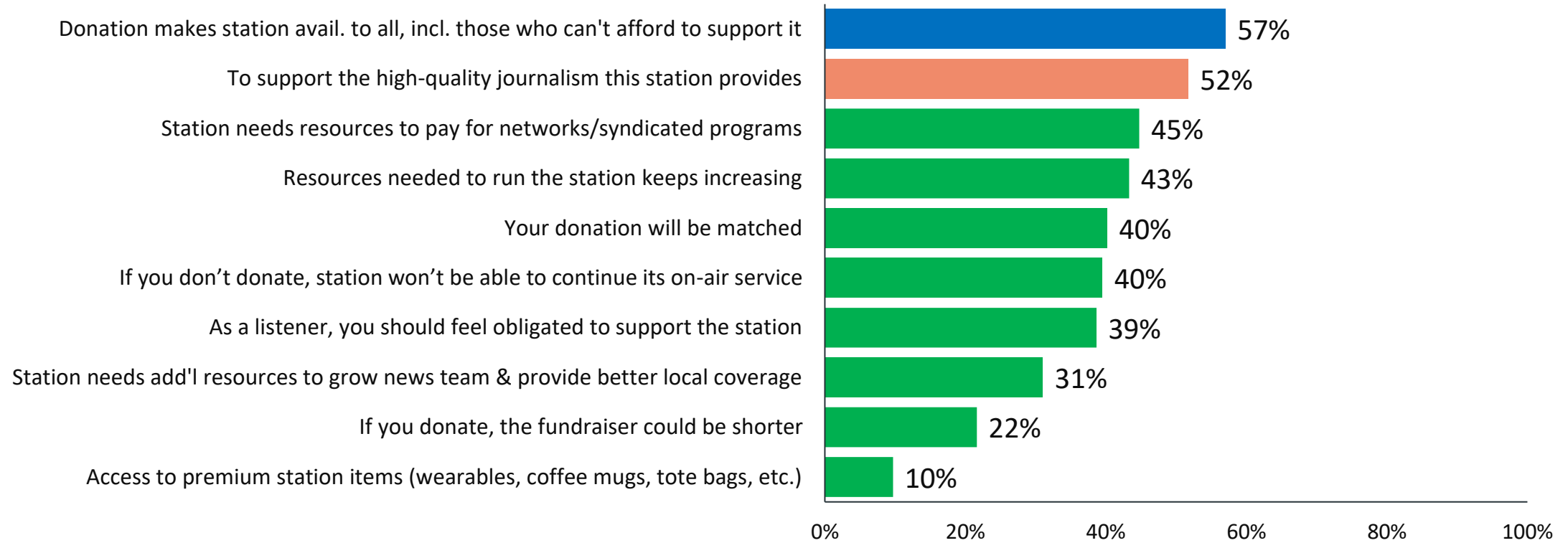
Among Those Who at Least Occasionally Switch Away From Their P1 Station When It Is in a Fundraising Drive, % Mentioning Each as Reason They Do So



Among a list of presented options (multiple responses accepted)

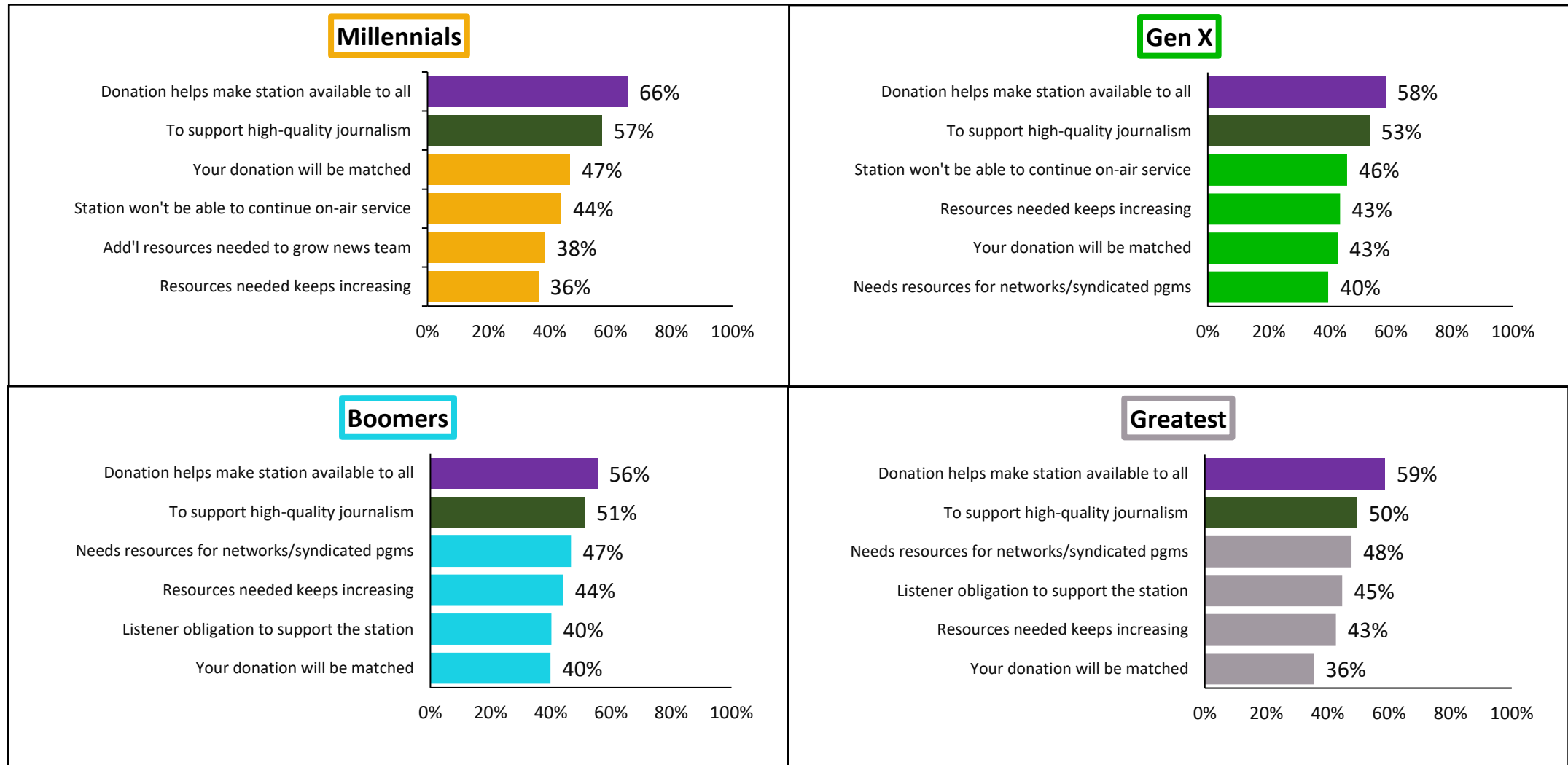
A Majority Point to Donations Making Public Radio Available to All *and* Supporting High Quality Journalism

“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

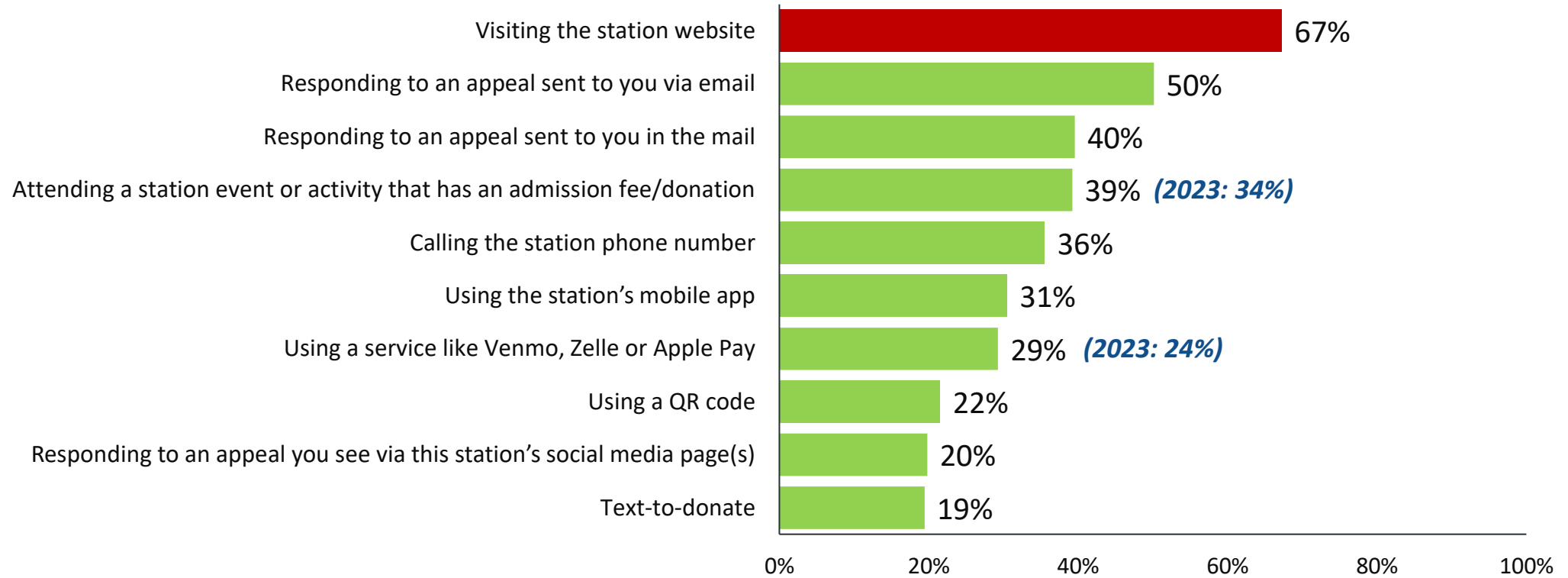
The Most Powerful Fundraising Appeals Across All Generations Are Donations Making Public Radio Available to All and Supporting Quality Journalism



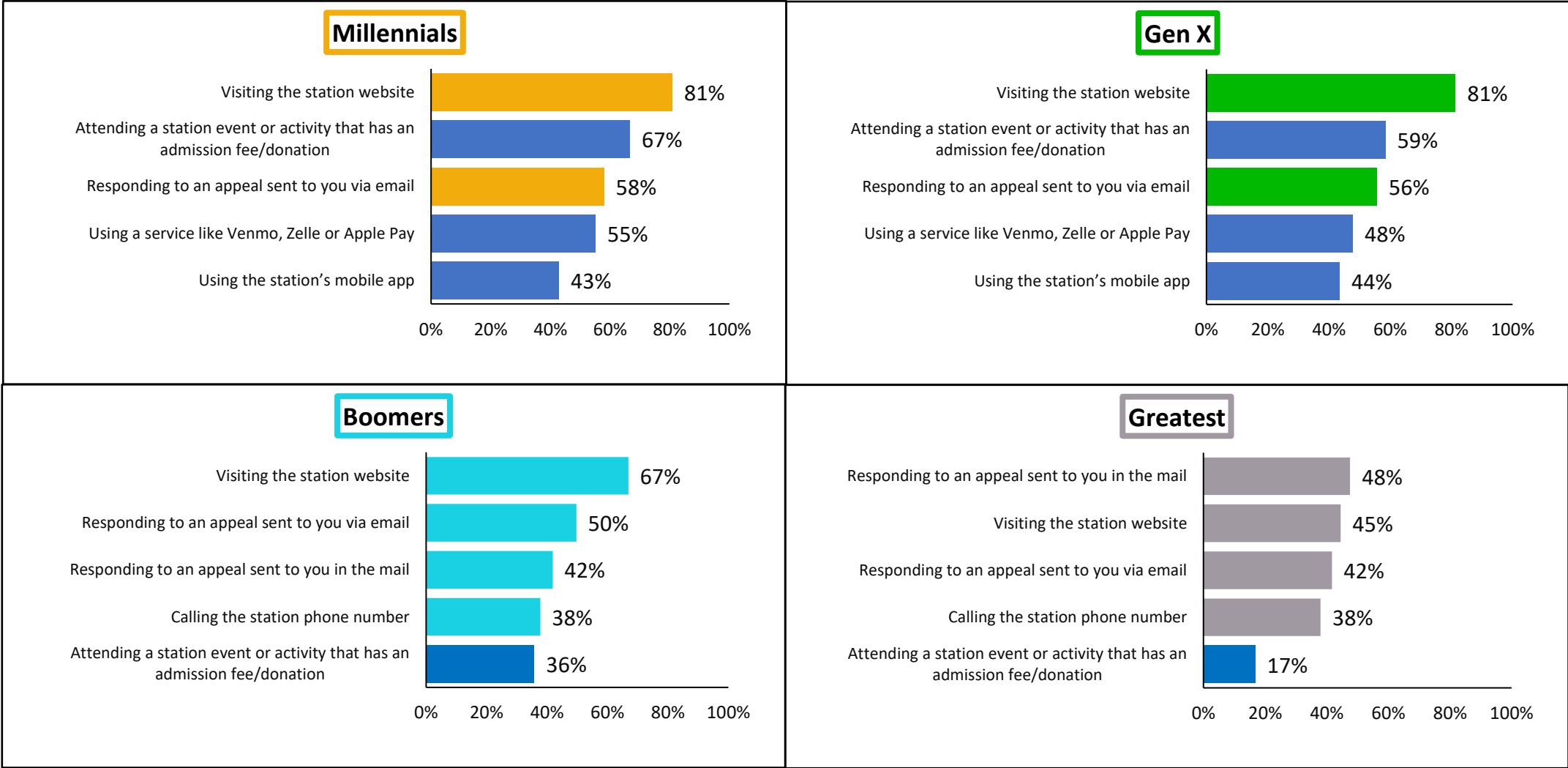
"Of the following list of appeals/offers THE STATION THAT SENT YOU THIS SURVEY might make during its fundraising efforts – which of these are most likely to impact your decision to make a financial contribution to the station?" (top 6 items mentioned among those asked – multiple responses accepted)

Visiting the Station Website Is the Top Donation Method, But Other Ways to Donate Vary By Demographic

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



Secondary Fundraising Avenues Such As Station Events and Digital Platforms (ex: Venmo) Are Growing Among Younger Listeners



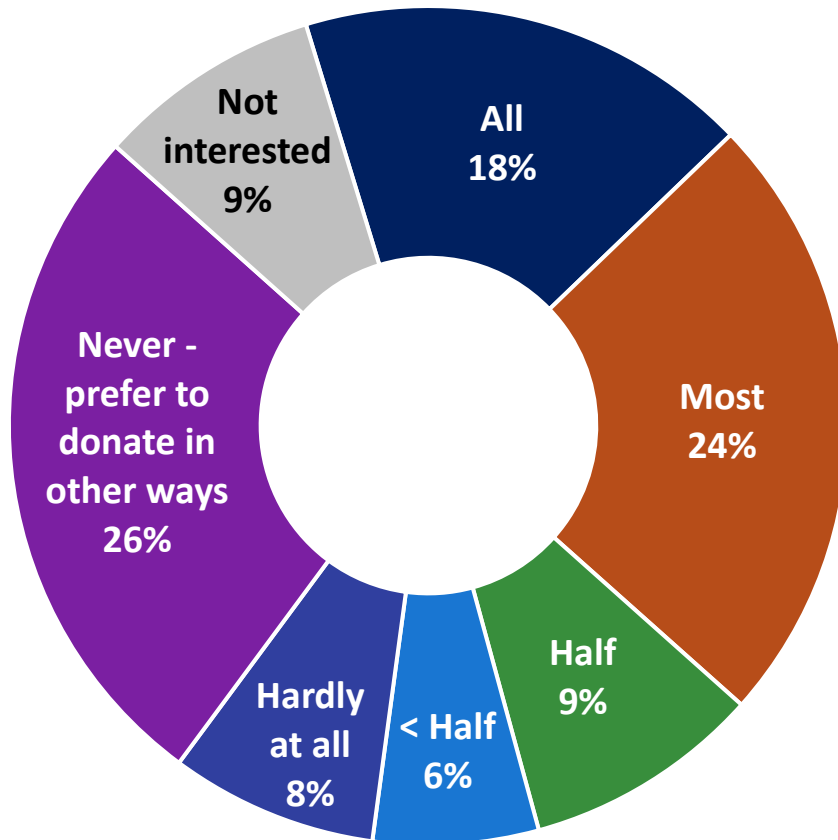
% interested (very + somewhat) in each method of donating to their P1 station
(top 5 donation methods shown among those asked)



Round-up
donation
programs are
“off-air”
fundraisers that
work.



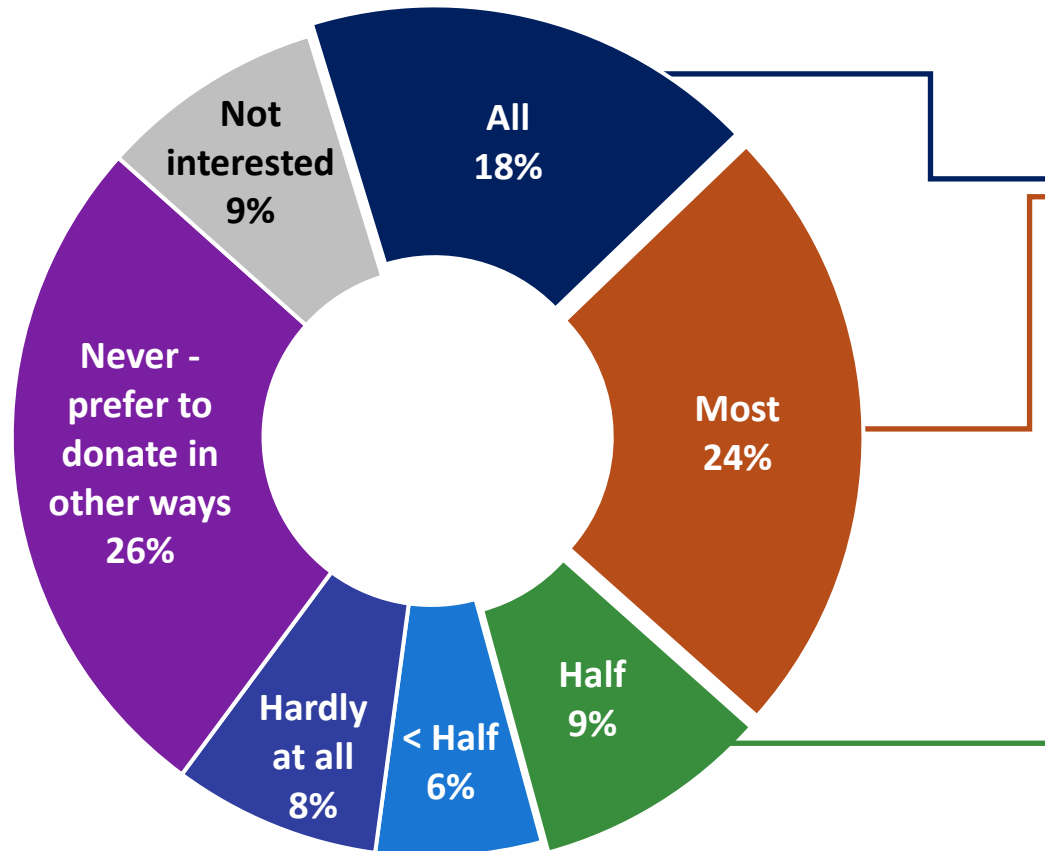
There Is a Sizeable Segment of the Public Radio Audience Who Say They Would Use the “Round Up” Store Donation Option Often



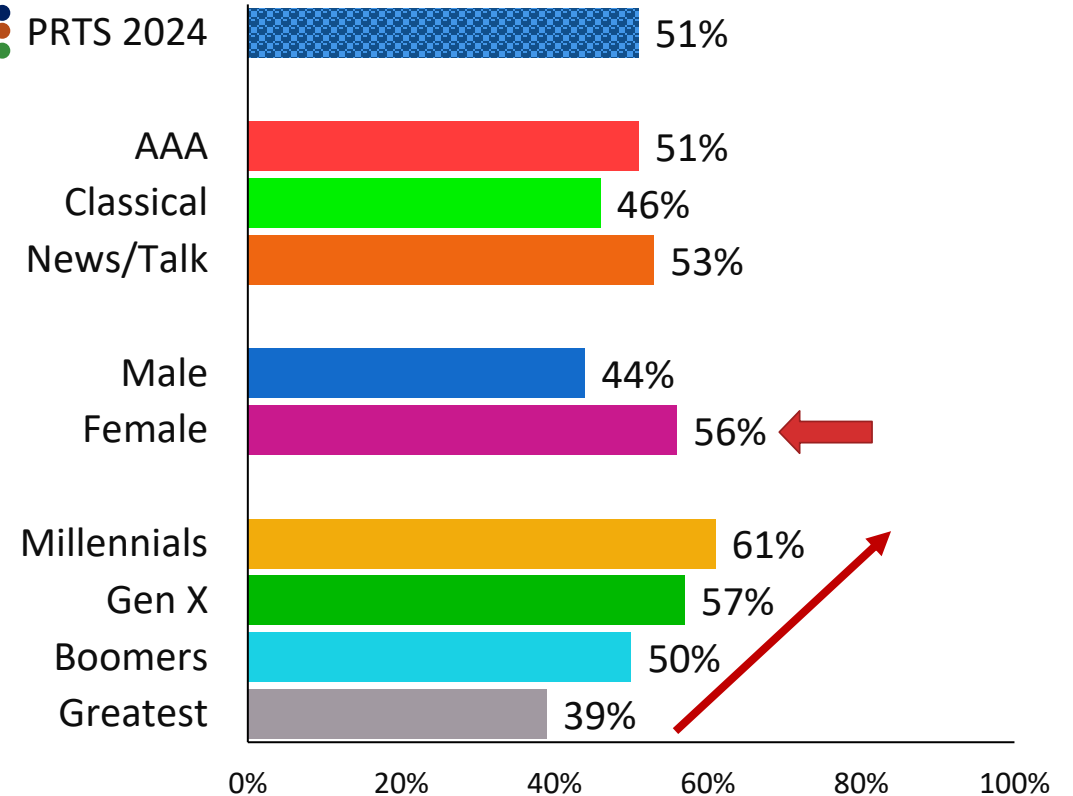
“Some non-profit organizations make donation arrangements with retail chain stores in their community (grocery stores, hardware stores, etc.) for shoppers to “round up” their purchase to the next dollar. For example, if the bill comes to \$3.25 it gets “rounded up” to the next dollar to \$4.00, with the 75¢ difference going to the non-profit.

If you were a customer at one of these stores, how often do you think you would “round up” your purchase to donate the difference to THE STATION THAT SENT YOU THIS SURVEY?”

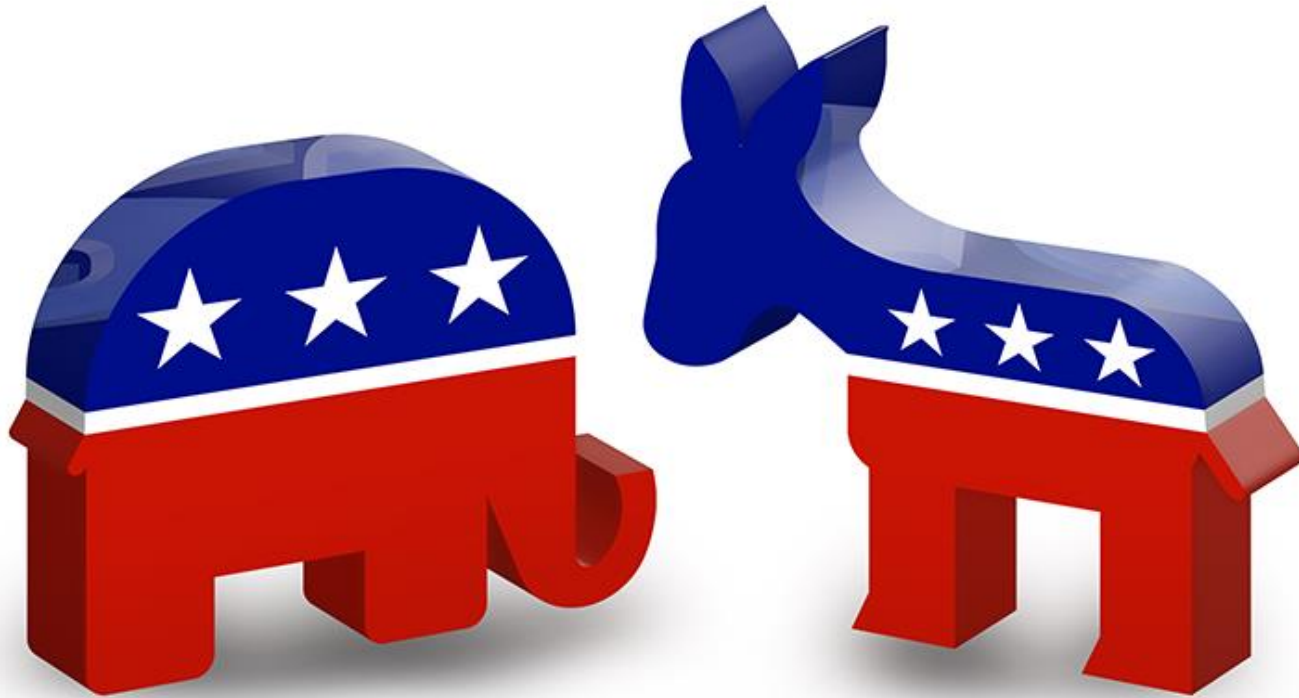
A Majority of Public Radio Fans Say They Would Use the “Round Up” Store Donation Option Half the Time or More



% Saying They Would Use the “Round Up” Donation Option “All,” “Most,” or “Half” the Time If Offered

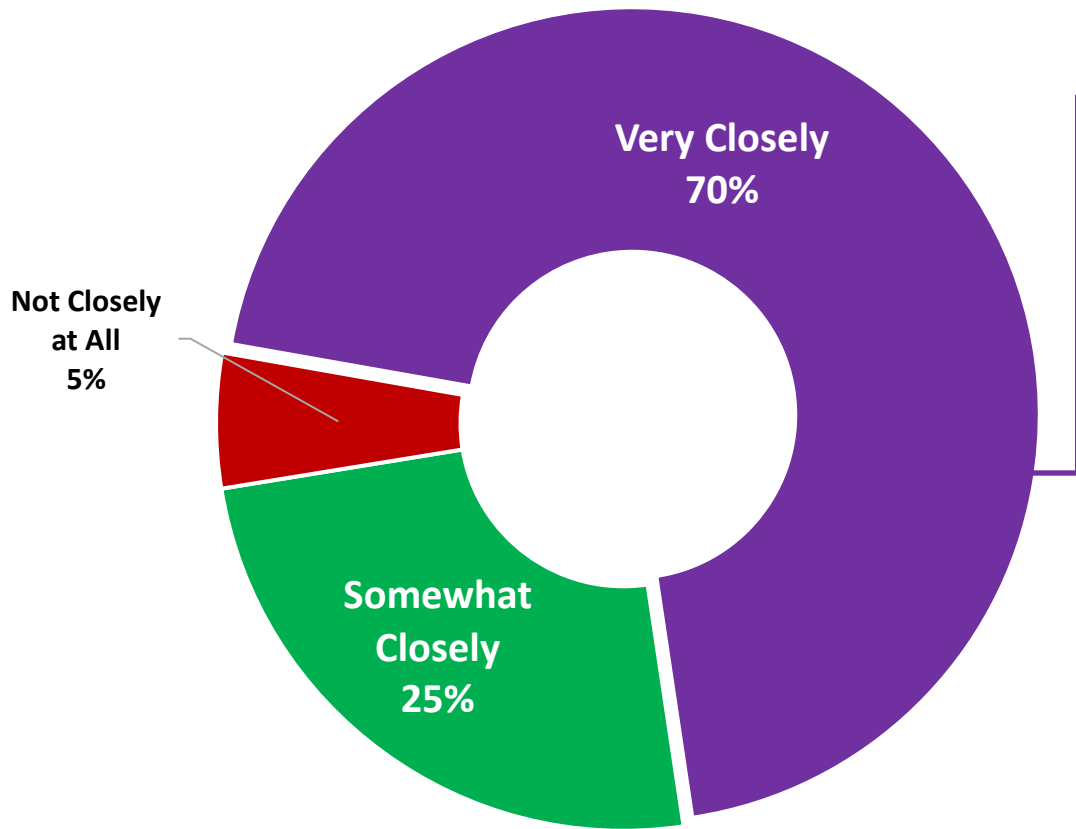


“If you were a customer at (a store offering a ‘round up’ donation option), how often do you think you would ‘round up’ your purchase to donate the difference to THE STATION THAT SENT YOU THIS SURVEY?”

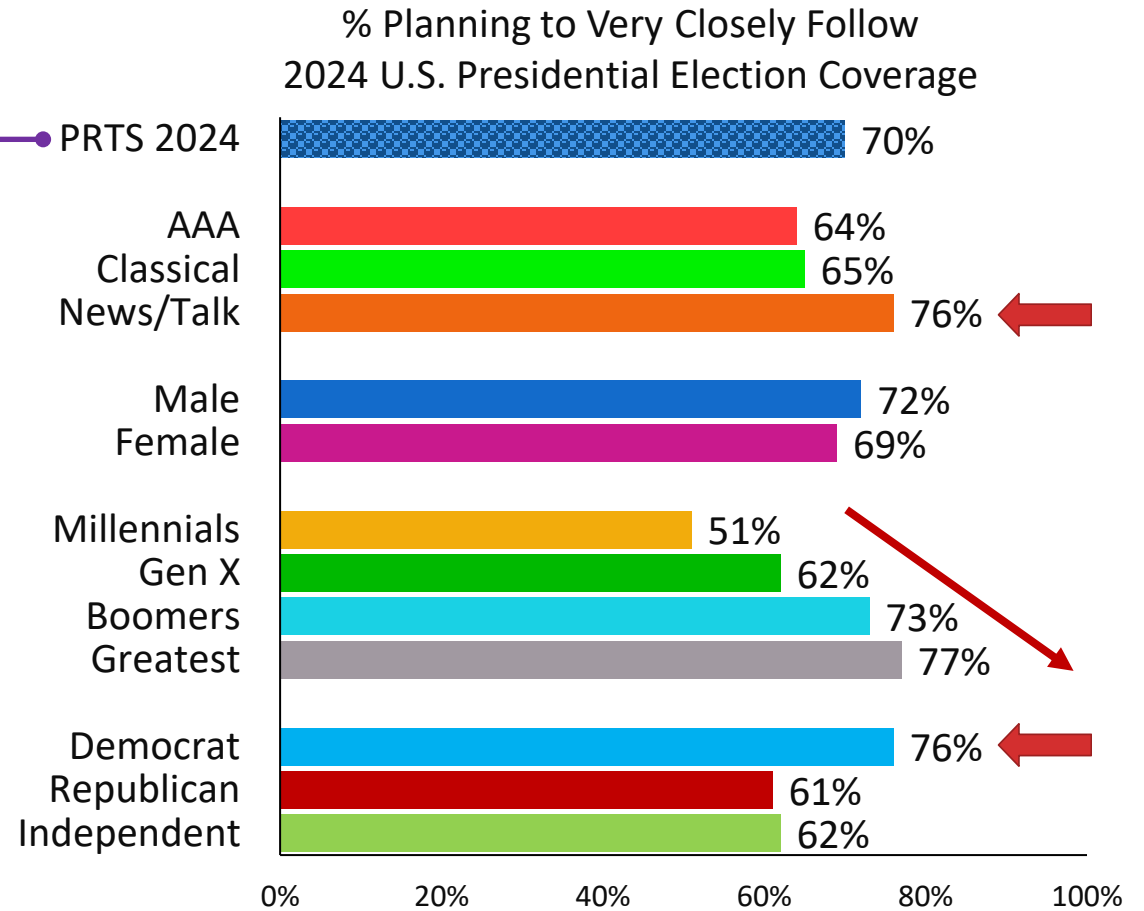


**Election 2024:
It's coming soon!**

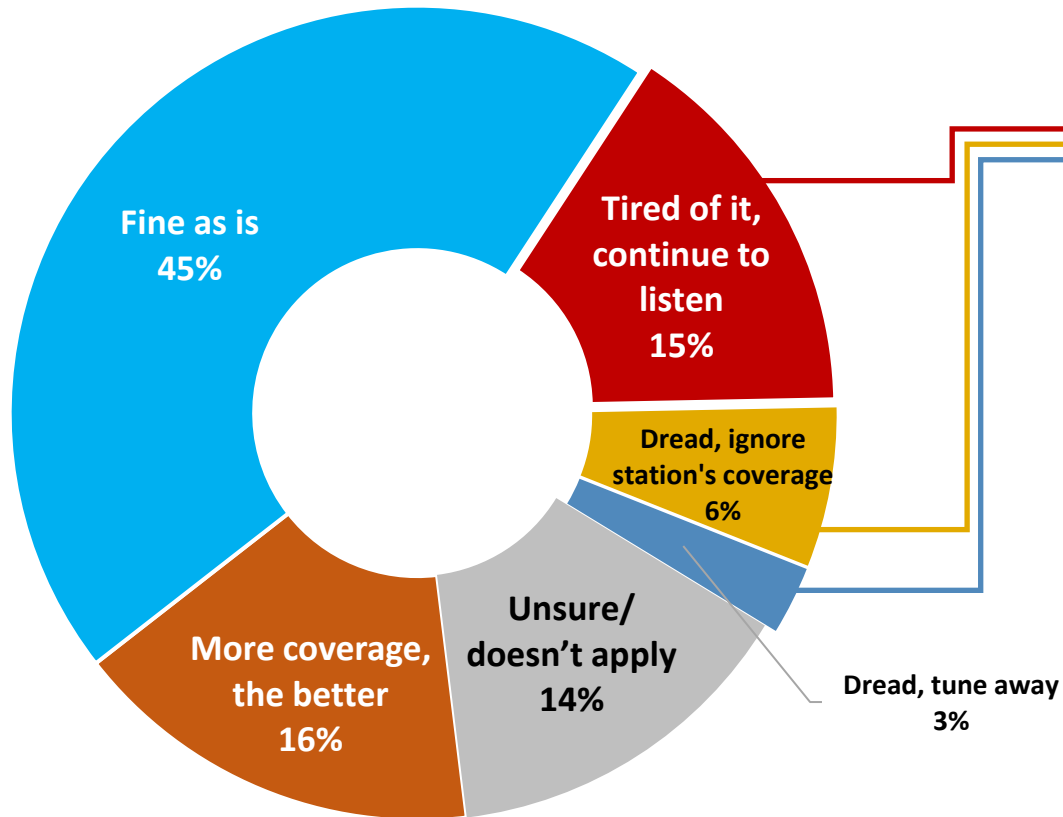
Seven in Ten Plan to Follow U.S. Presidential Election Coverage Very Closely, Especially Core Partisans of News/Talk Stations



"How closely do you plan on following the 2024 U.S. Presidential election coverage?"

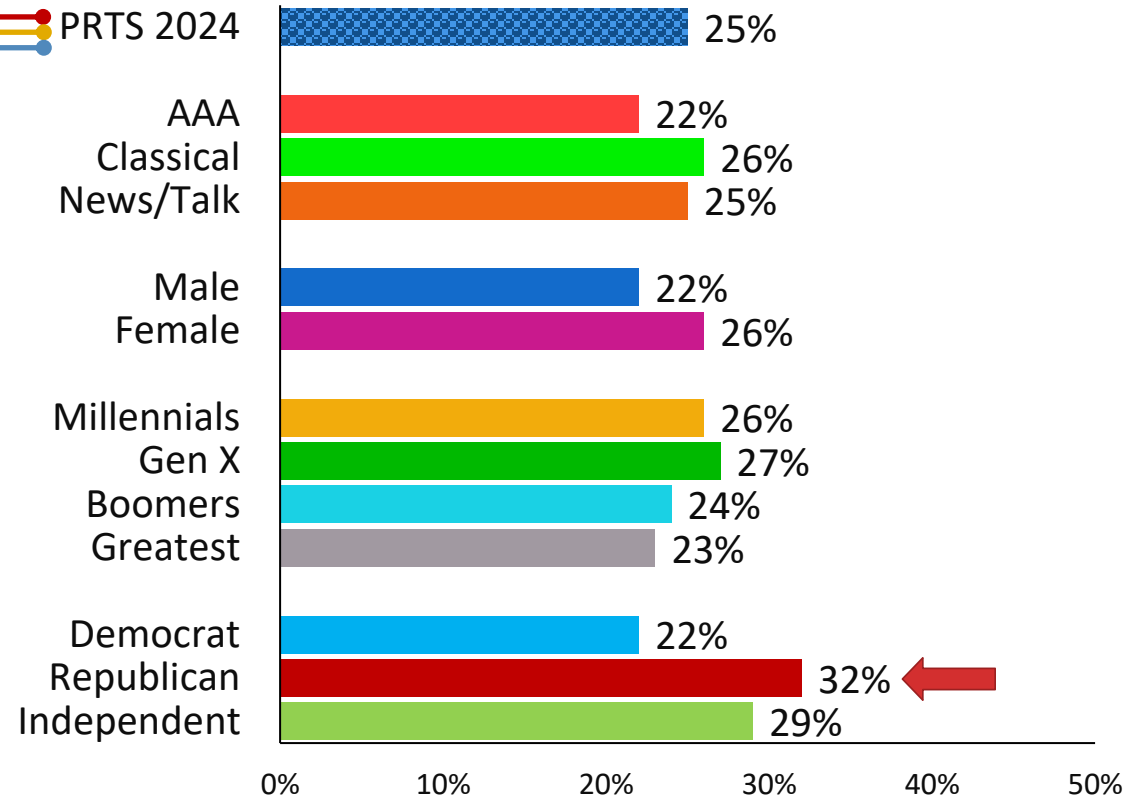


But One in Four Either Dread/Are Tired of Hearing Presidential Election Coverage on Their Favorite Public Radio Station

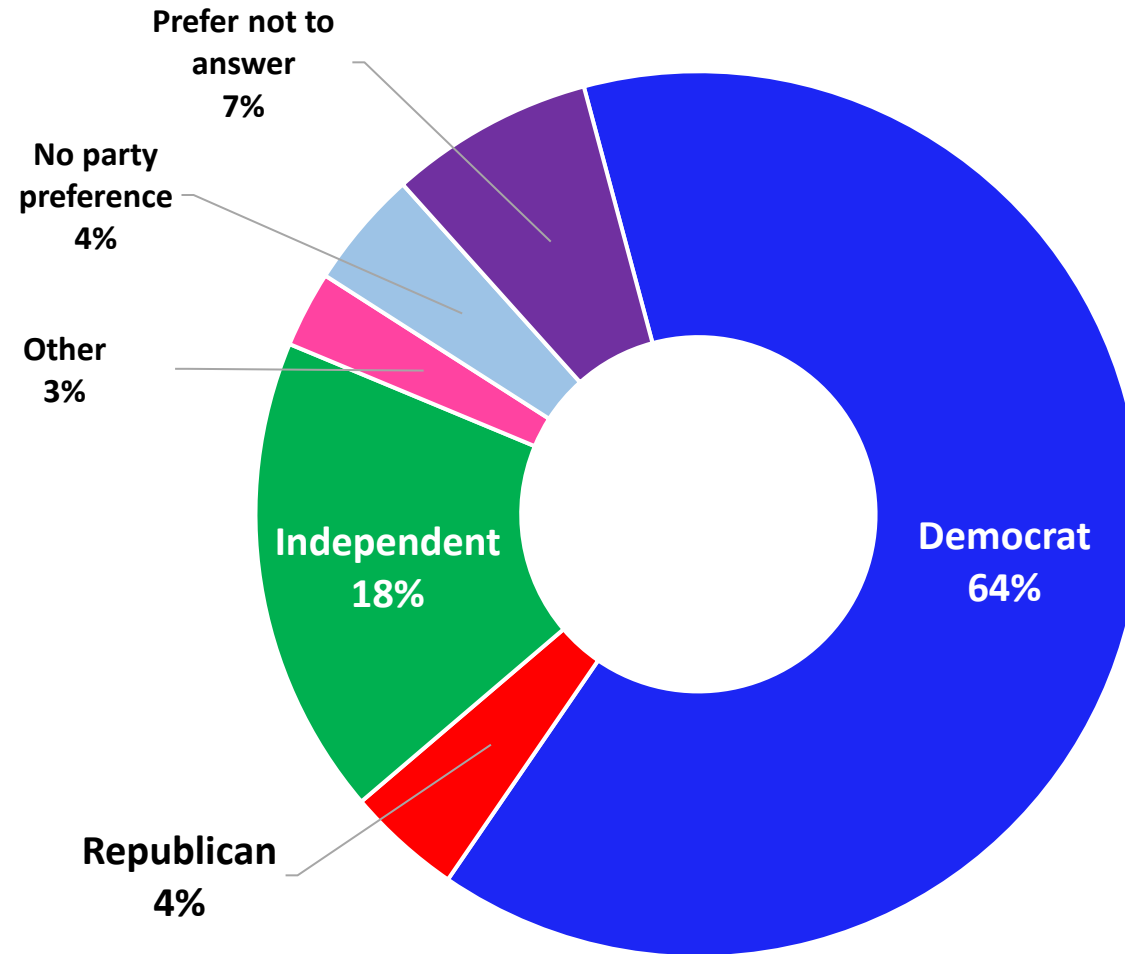


"Which best describes how you feel about how (P1 Public Radio Station) presents 2024 U.S. Presidential election coverage?"

% Who "Dread" or Are "Tired of" P1 Public Radio Station's U.S. Presidential Election Coverage



Political Party Preference





The case for a
“next adjacent”
strategy for
Public Radio.



The best
avenue?
Gen Xers (but it
won't be easy).

What is a “next adjacent” strategy?

- It’s an audience growth strategy designed for brands that have failed to adapt, instead continuing to super-serve its legacy audience.
- Rather than casting for a very different aspirational audience in order to survive and thrive, the “next adjacent” strategy targets an audience already aware of the brand and possibly using it.
- A logical “next adjacent” strategy for Public Radio is Gen Xers, many of whom already listen, but may not be as loyal or engaged.
- A research study – like PRTS – can be used to define the differences and similarities between the current audience – Boomers and beyond – and the “next adjacent” target – Xers.
- “Common threading” is a key strategic element, as is calculating the steps it would require to appeal to the “next adjacents” without turning off the core.



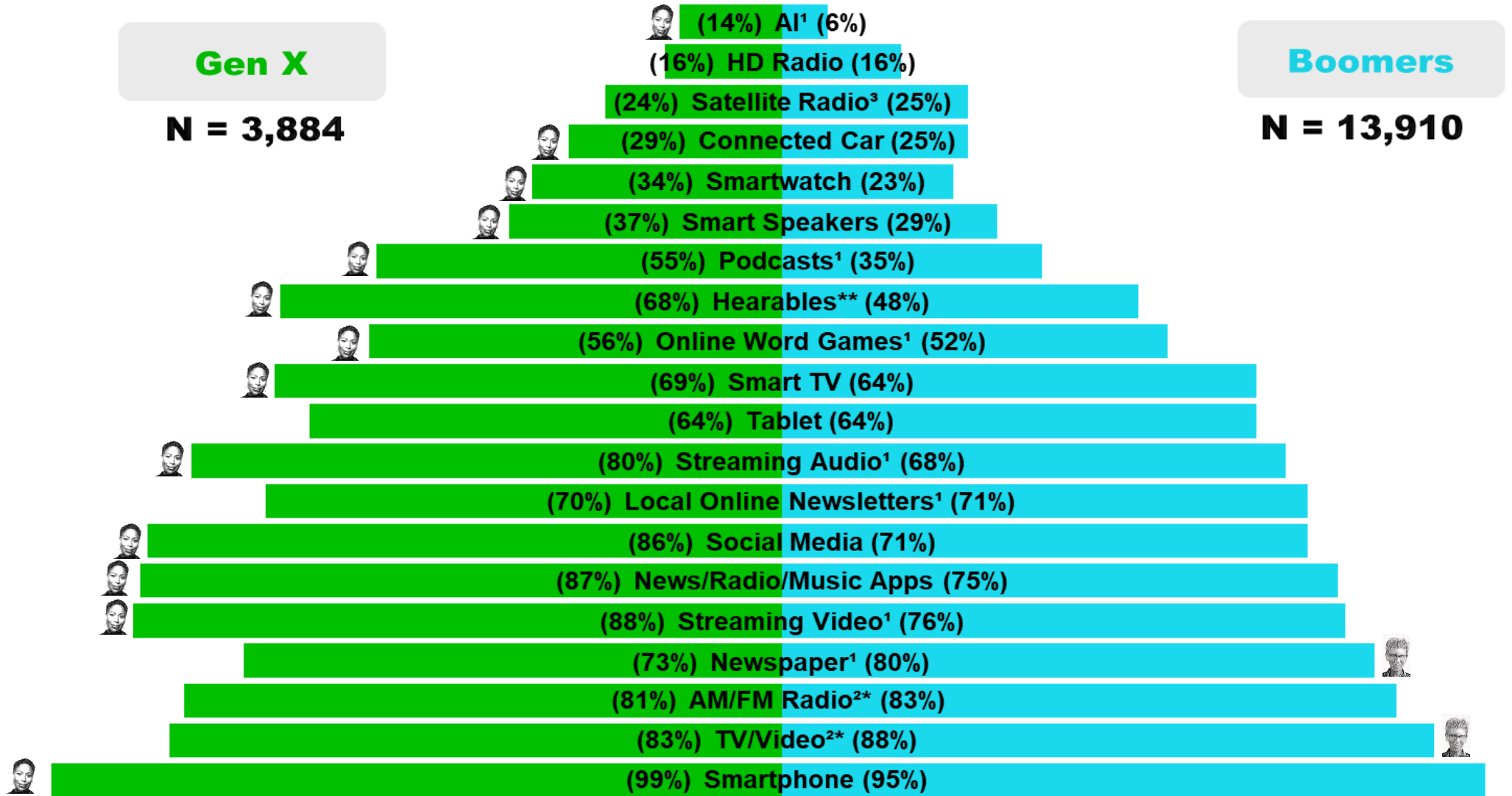
Media Pyramid 2024

Gen X

N = 3,884

Boomers

N = 13,910



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



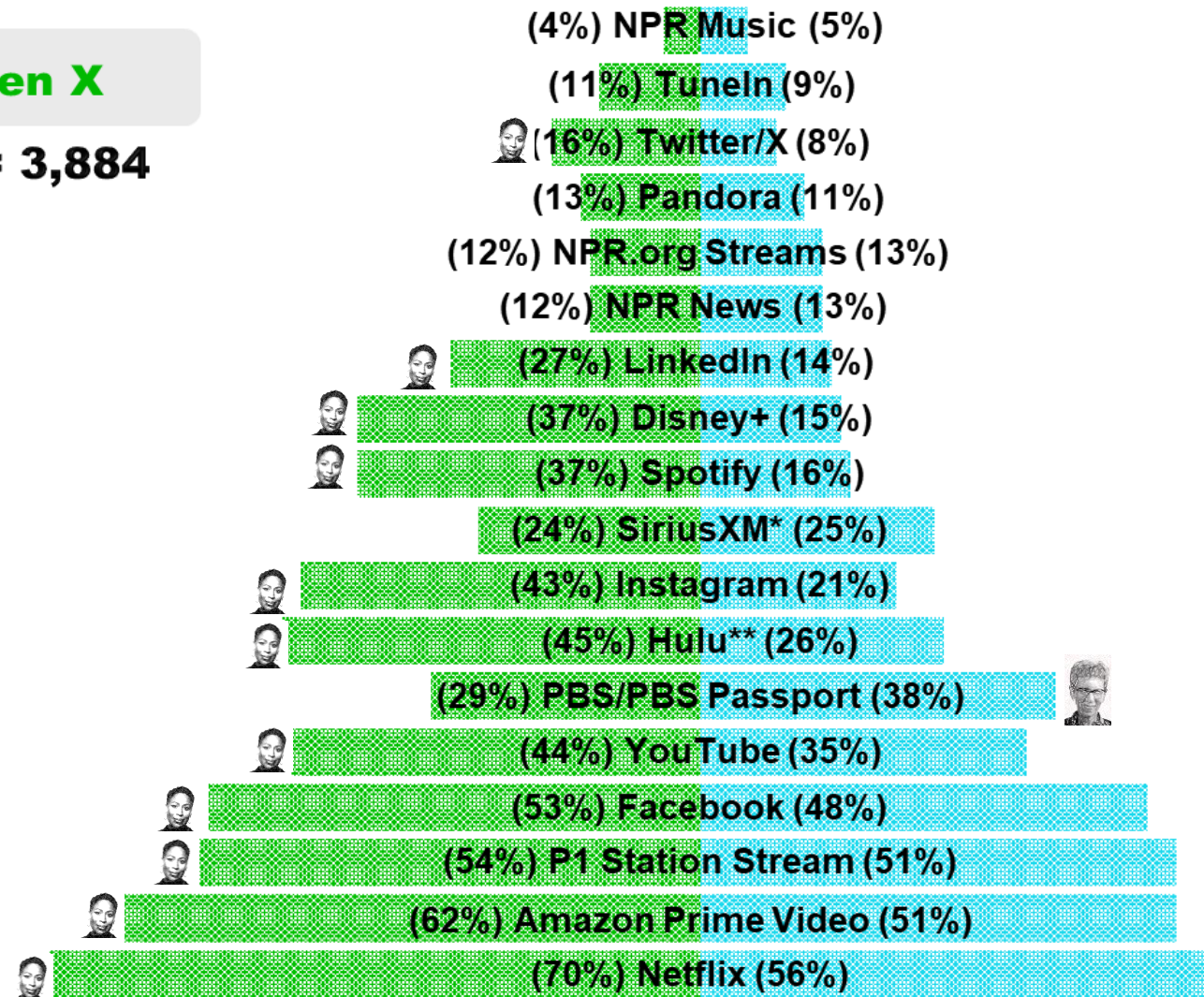
Brand Pyramid 2024

Gen X

N = 3,884

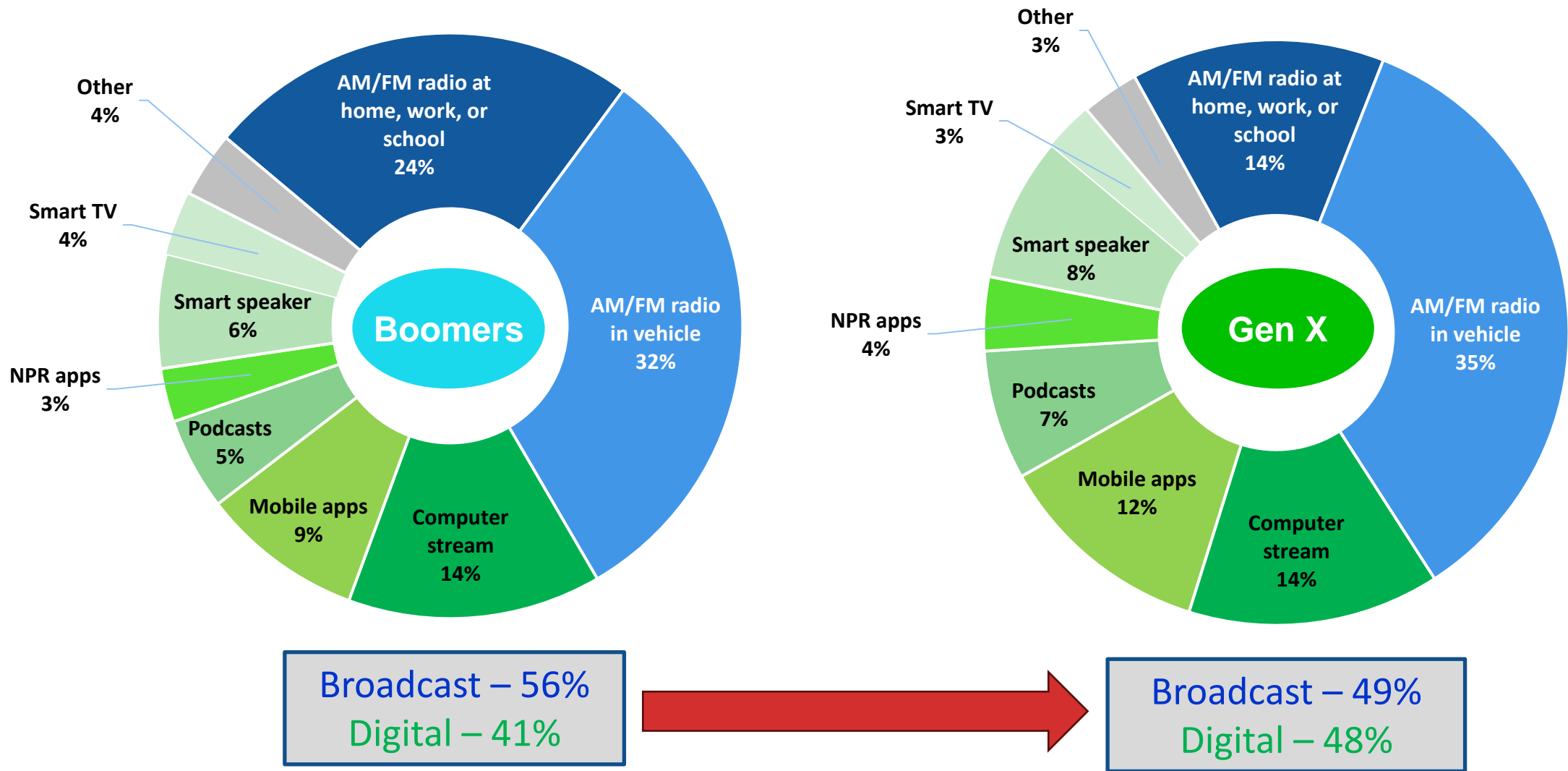
Boomers

N = 13,910

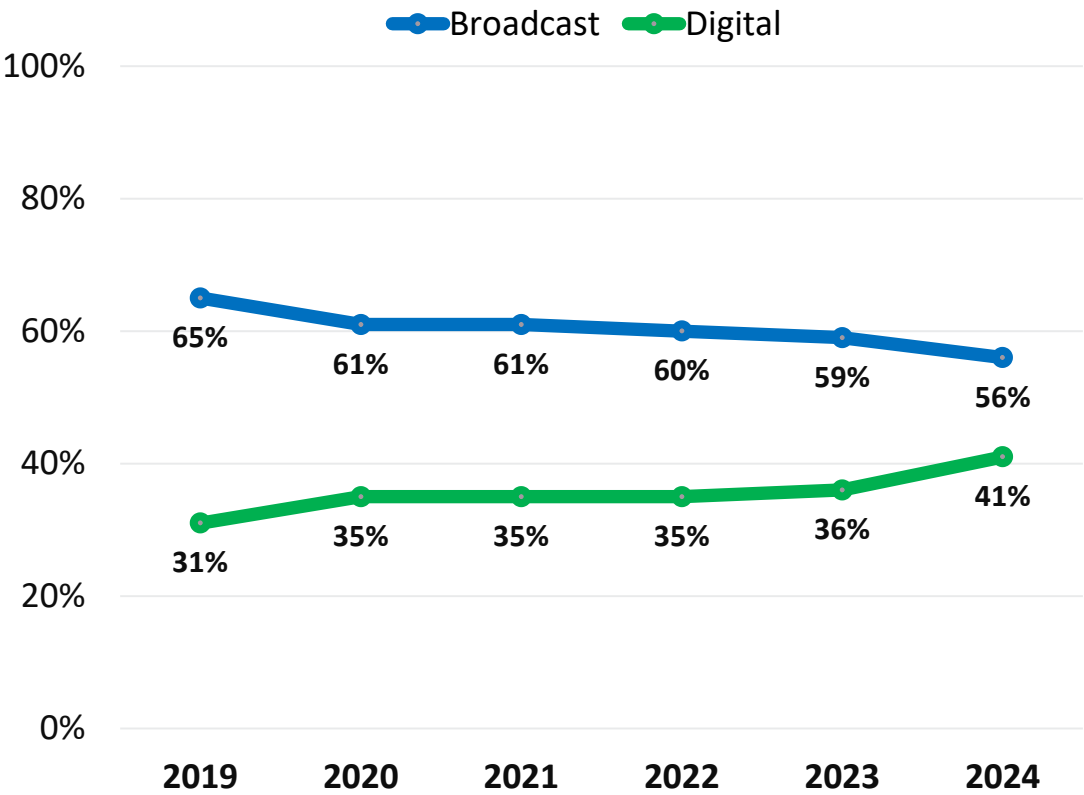


All weekly use except SiriusXM (*Paid & trial users) **Includes Live TV

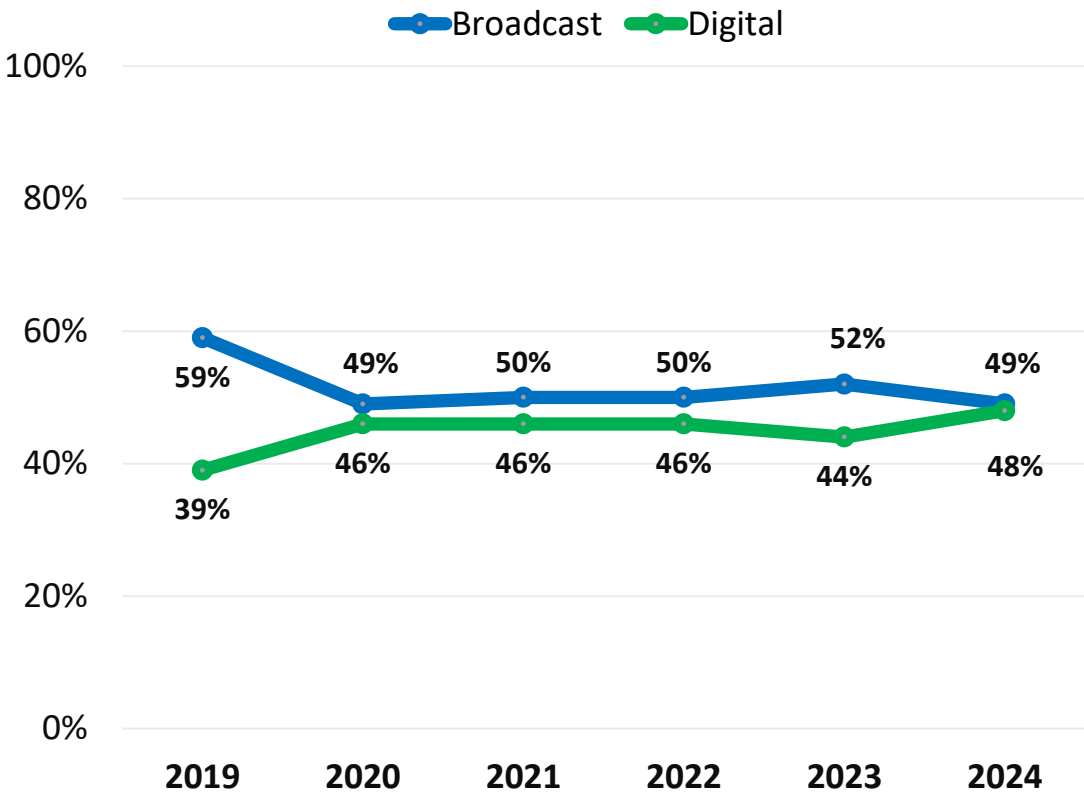
Among Gen Xers, Broadcast and Digital Usage Is Nearly Tied



Xers Are Embracing Digital and Boomers Aren't Far Behind



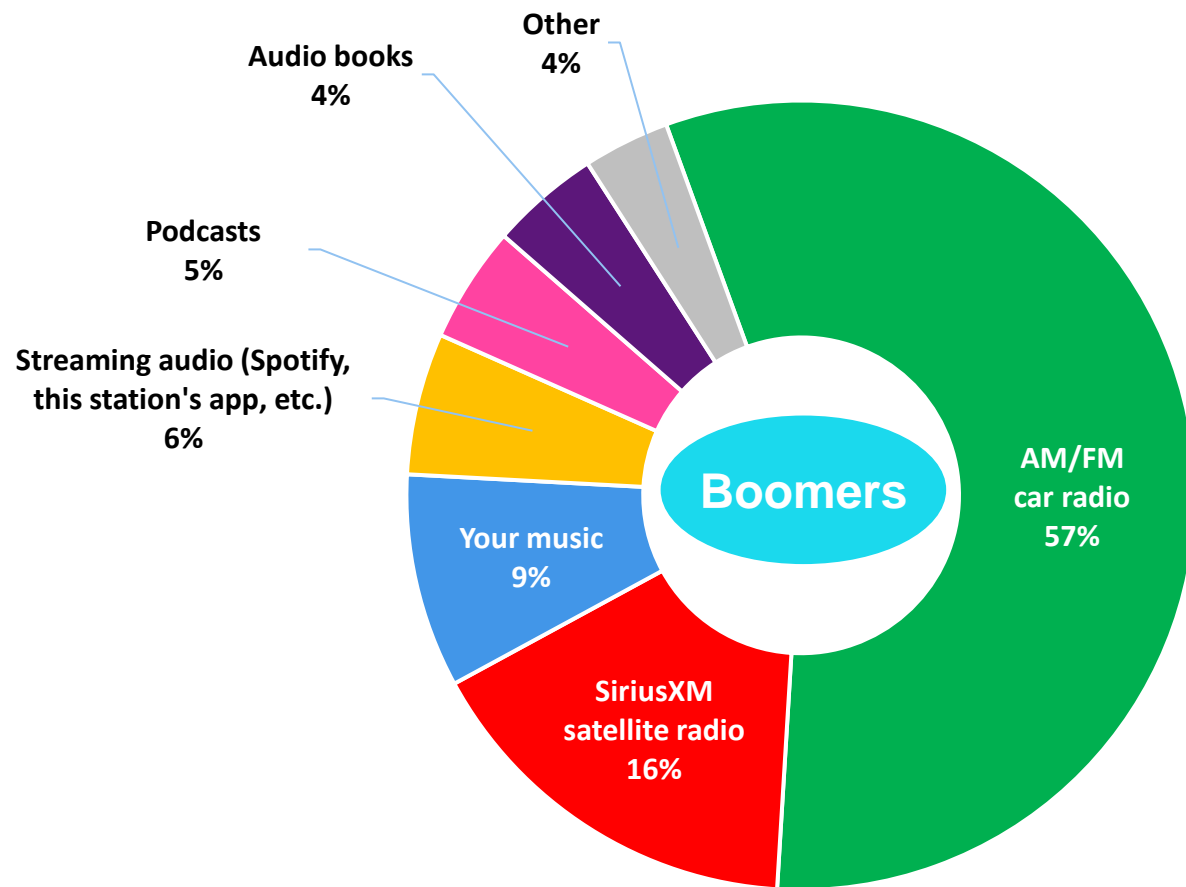
Boomers



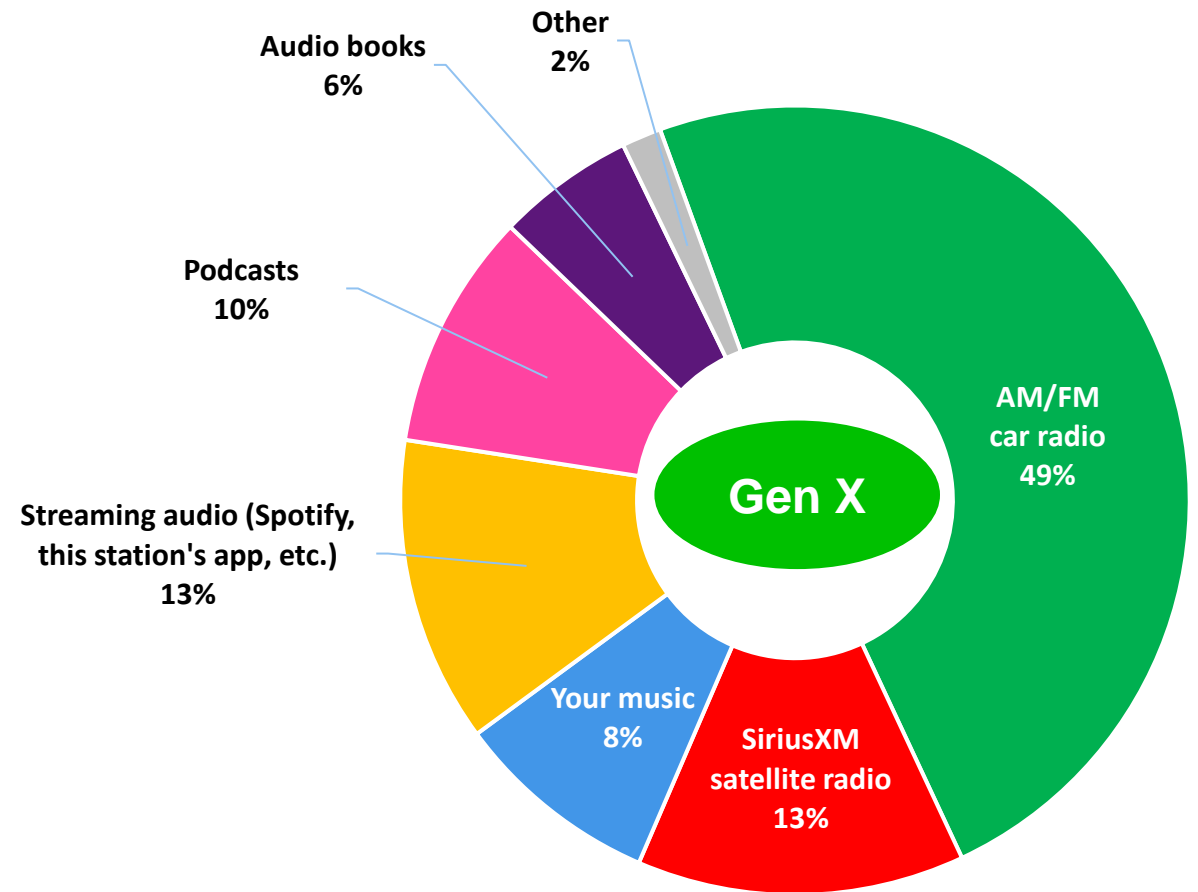
Gen X

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

In-Car Audio Usage: Boomers vs. Xers

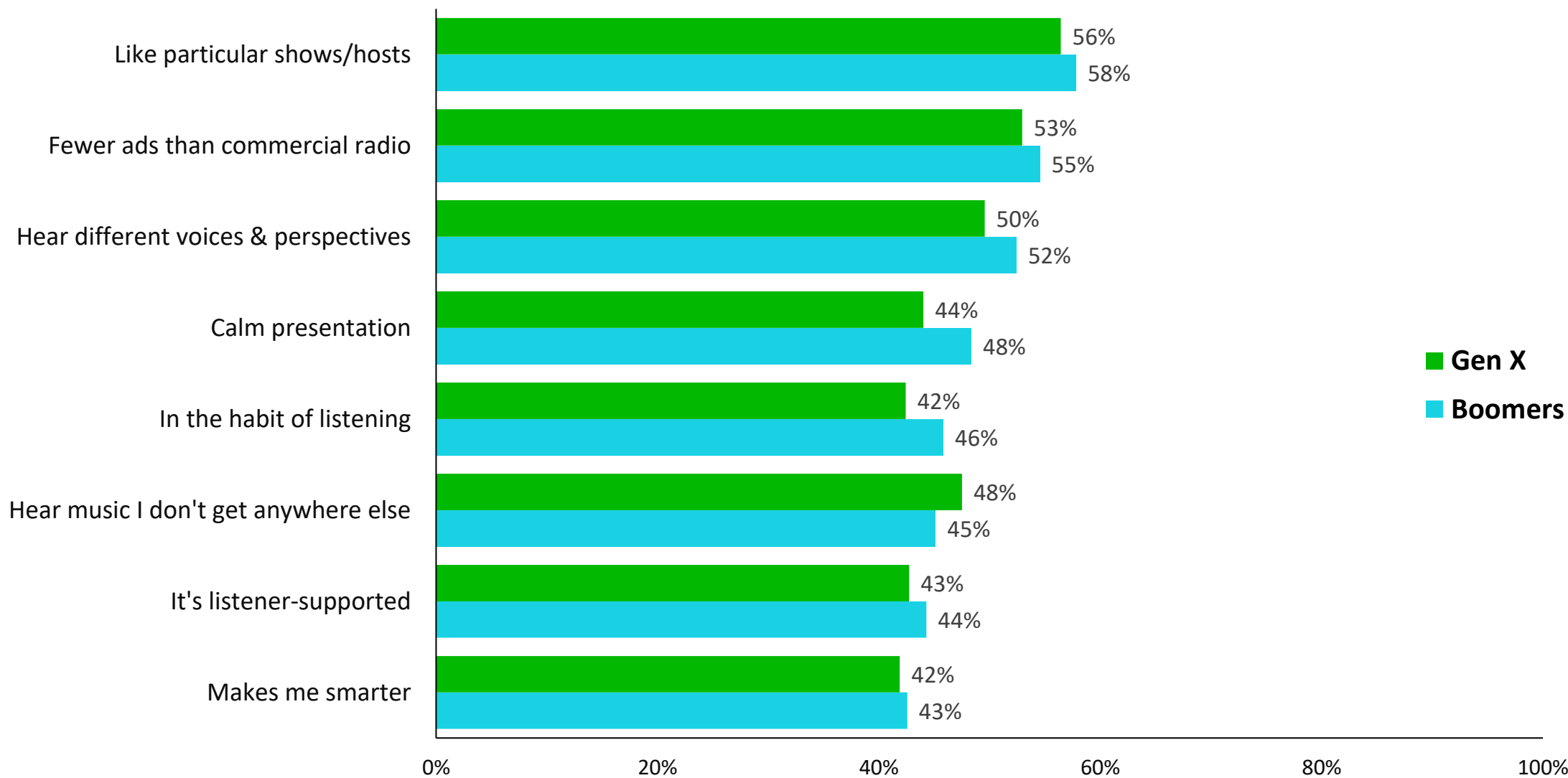


AM/FM Car Radio – 57%
Other Audio – 40%



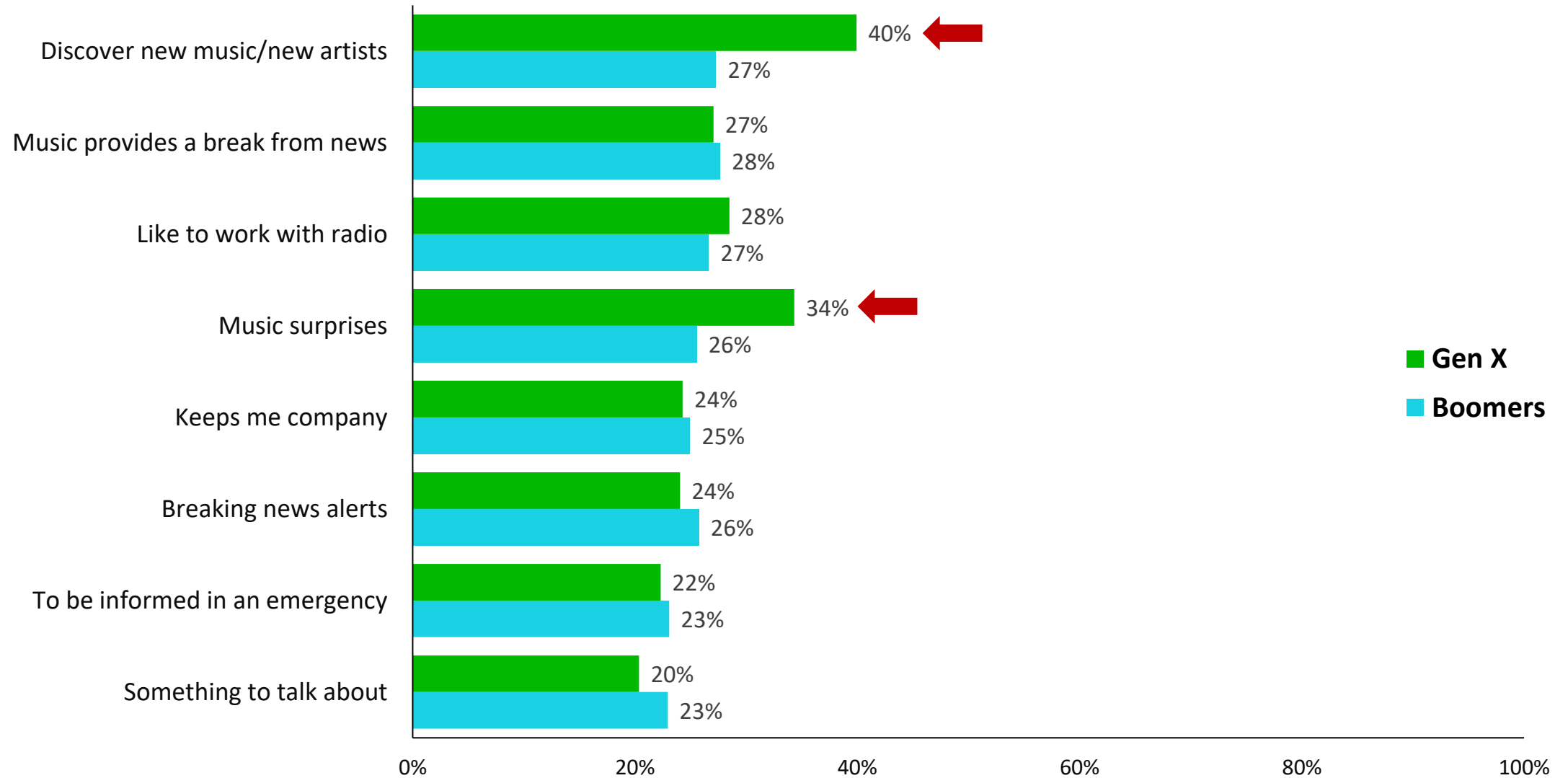
AM/FM Car Radio – 49%
Other Audio – 50%

Why Public Radio: Gen Xers vs. Boomers

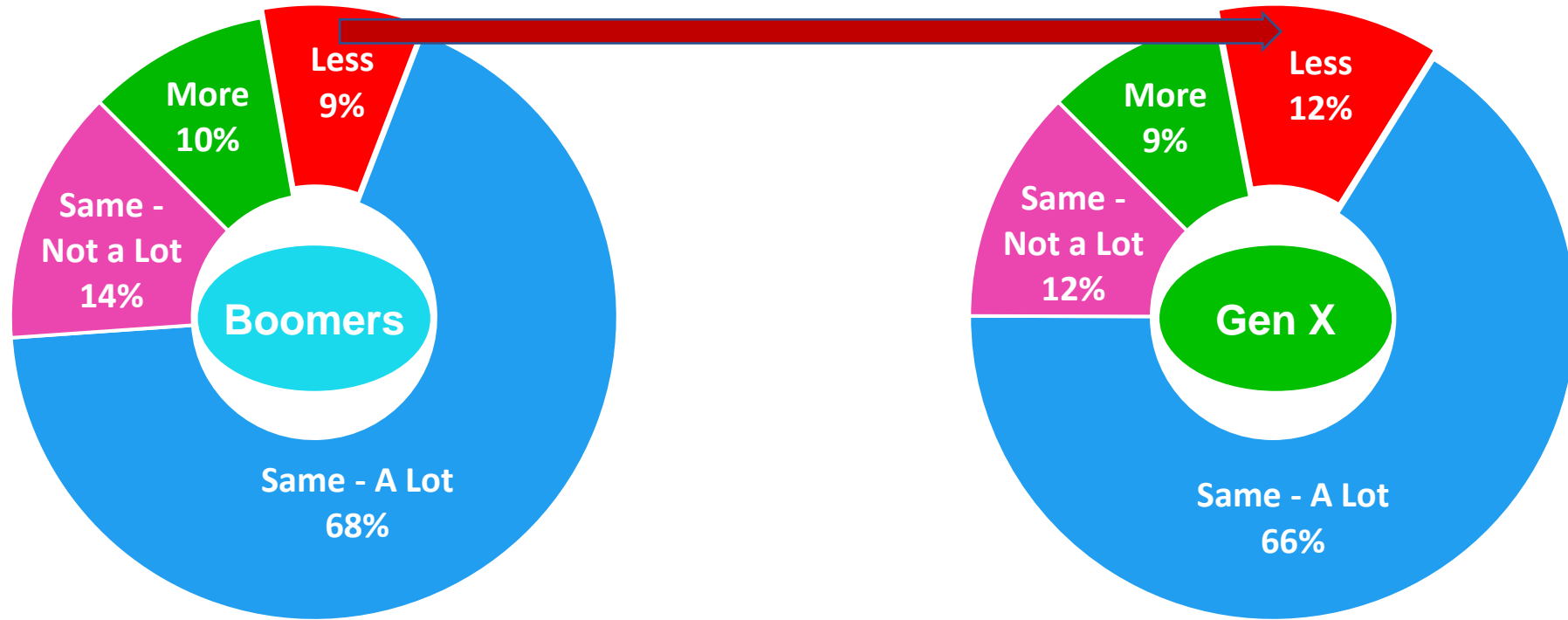


Among those who listen to AM/FM radio, % who say
this is a main reason they listen to Public Radio

Why Public Radio: Gen Xers vs. Boomers

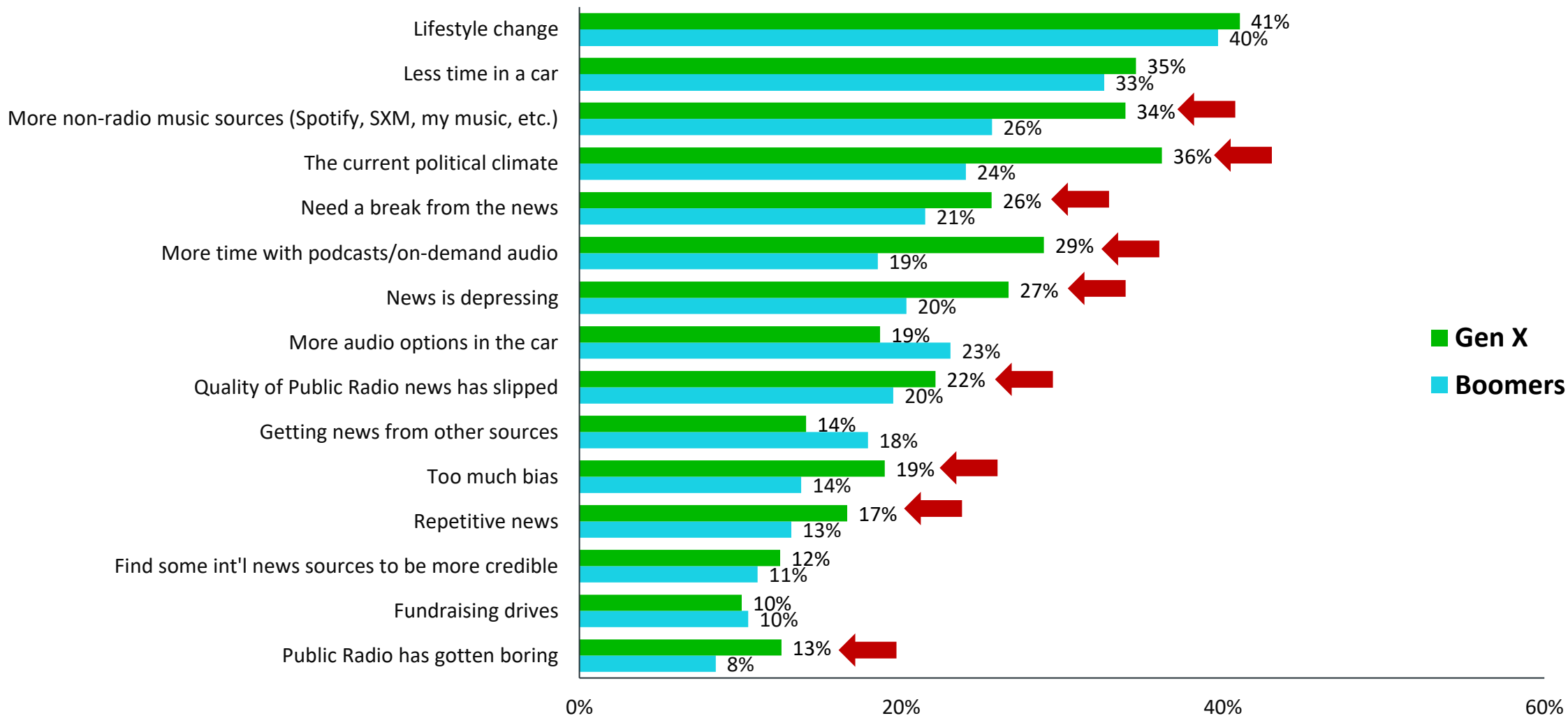


Public Radio Listening Momentum: Gen Xers vs. Boomers



Among those who listen to AM/FM radio

Boomers vs. Xers: 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



9 Key Takeaways

9 Key Takeaways

- 1) It's been a challenging year for Public Radio and the vital signs in PRTS 2024 reflect it.
- 2) Public Radio's vaunted "core values" are showing signs of wear.
- 3) The disruptive effects from COVID appear to be mostly behind us.
- 4) The news cycle is challenging even for so-called "news junkies," motivating some listeners to escape.
- 5) The desire for local news continues unabated.
- 6) The digital transformation enjoys an impressive boost in this year's study, including time-shifting content consumption.
- 7) Mobile continues its long march, becoming an even more important part of the way Public Radio fans use media.
- 8) The more connected the car, the more Public Radio drivers and passengers are discovering and using other audio choices.
- 9) Public Radio's fundraising model is under pressure, but there may be answers and options.



PROGRAMS/CONTENT

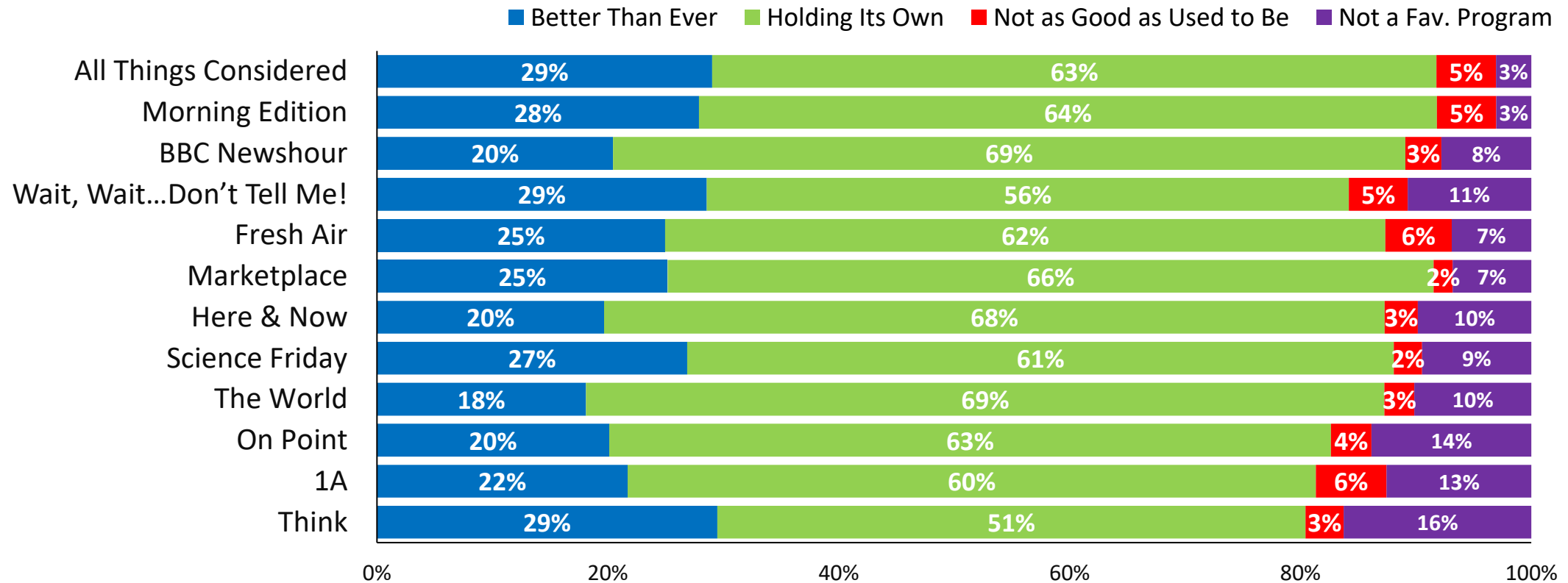
NPR updates newsmag strategy to address audience declines

By **Tyler Falk, Reporter** | September 27, 2024

Last week, NPR announced they are recalibrating their news magazines' targets to 40-to-64 year-olds.

Public Radio Programs: Momentum

% Describing Each Program As Sounding (...) These Days *(ranked by familiarity)*

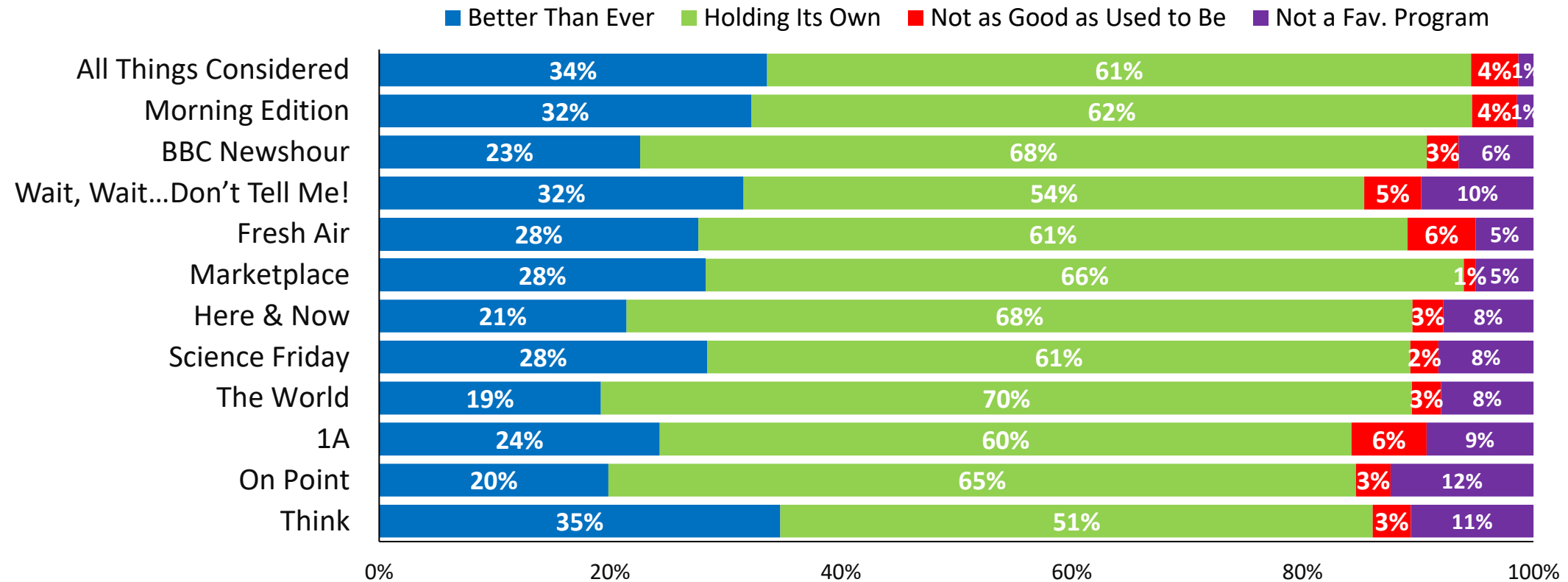


Base: familiar with each public radio program and gave a response

Public Radio Programs: Momentum

News/Talk

% Describing Each Program As Sounding (...) These Days *(ranked by familiarity)*



Base: familiar with each public radio program and gave a response

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