



Jacobs Media's 8th Annual Public Radio Techsurvey

Executive Summary – August 2016

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

The sample: 69 public radio stations in the U.S. delivered 29,406 respondents, mostly via membership/email databases.

Survey dates: May 11-June 13, 2016

Among the extensive findings, the following are designated as key highlights:

1. **The lay of the land.** Across the entire sample, the mobile revolution kicks into an even higher gear. More than eight in ten (83%) respondents now own a smartphone; nearly two-thirds (64%) carry a tablet. Overall radio listening is up a tick. Nearly nine in ten (88%) listen to broadcast radio one hour a day or more often. Public radio listening momentum is in-synch with last year's PRTS7 study. In the new study survey, nearly one-fifth (18%) say they're listening to more public radio in the past year, while only 7% indicate listening less. Those who tune in more because of the election as well as weekly NPR One app users are especially likely to have increased their overall public radio listening over the past twelve months.
2. **The core values are intact.** For the total sample more than half say key drivers supporting public radio listenership include learning new things, credible and objective programming, a deeper news perspective, respect for the listener's intelligence, and a balanced perspective.

3. **The election is driving listening.** Overall, one-fifth agree/agree strongly with the notion the Presidential race has led to an increase in public radio listening, especially fans of the News/Talk format, as well as Millennials.
4. **The shift to digital.** In PRTS8, nearly one-fourth of public radio consumption (24%) occurs on digital platforms (streaming, podcasts, etc.) – up from last year’s level of 19%.
5. **TV on-demand is a big trend.** There is a correlation between video on-demand and podcasting that emerges from the PRTS8 spreadsheet. Overall, half the sample now owns a “smart” or connected TV. And four in ten (40%) say that all or most of their television viewing is on-demand. Of these more than half (56%) say they “binge watch” favorite programs. Those who listen to podcasts monthly are most likely to also be video on-demand heavies, as well as binge watchers, demonstrating a connection between audio and video on-demand media consumption.
6. **Podcasting continues to be robust.** Four in ten (41%) listen to podcasts or on-demand audio at least monthly, especially younger generations of listeners, as well as News/Talk partisans. Podcasting momentum is highest among Millennials. Regularly podcasting listeners enjoy listening to radio shows that previously aired, as well as podcasts that are news/current events/politics related. Other topics mentioned by at least one-fifth of these podcast regulars include science, fine arts and culture, comedy, and TV/film/pop culture.
7. **Millennials are different.** Gen Y public radio listeners are deep into podcasts, mobile phone usage, and social media connections. Nearly eight in ten regularly watch TV on Netflix (78%), while half enjoy sharing photos on Instagram (51%). More so than older generations, they are more likely to access news from digital sources rather than radio. They are also less likely to own a radio where they live. Millennials are most likely to interact with their favorite public radio station via podcasts and mobile apps. And half (49%) admit being addicted to their mobile phones. To drive that home, three-fourths (75%) wake up with their mobile phone, rather than a traditional clock radio.
8. **Socially speaking.** More than three-fourths (77%) of this public radio sample engage in social media. Of them, nine in ten (90%) are on Facebook, a majority of whom log on at least daily.
9. **Sustainers outnumber annual givers.** In PRTS8, eight in ten (83%) respondents are station members, and half (50%) are sustaining members, especially women, fans of the News/Talk stations, and Millennials.
10. **NPR One is progressing.** Of smartphone/tablet owners who download radio and/or music-centric apps, one in ten (11%) has accessed NPR One, especially Millennials. Of these, four in ten (37%) use the app weekly or more frequently. Eight in ten (82%) give the app “excellent” or “good” ratings. By more than a 2:1 margin, NPR One monthly users say they’ve been listening more to public radio broadcast stations – 17% to 7%.

- 11. The car is the thing.** Two-thirds (66%) of PRTS8 respondents who spend time in a vehicle are able to connect a mobile phone in their car. Overall, 15% own a “connected car” – up from PRTS7’s 13%. Of these, nearly seven in ten (69%) “love” or “like” these dashboard systems. And by a 3:1 margin, “connected car” owners say they’ve been listening to less AM/FM radio – 28% to 8%. Satellite radio has emerged as the biggest beneficiary.
- 12. The next car.** Overall, 16% of the sample plans to buy or lease a new vehicle this year (or had already purchased one in 2016). These prospective new car owners say the most important feature is AM/FM radio (88%), followed by Bluetooth and a smartphone connector (both with 62%).
- 13. Sharing and recommending.** Online sharing continues to rise. One-third say they share content they see online (email, social media, website, etc.) on a frequent basis, especially women. And public radio’s Net Promoter recommendation scores continue to be solid and consistent throughout the eight years PRTS studies have been conducted. Women and Millennials are especially likely to recommend their favorite public radio stations to others.

Key Trends:

- Public radio’s health is strong, but more and more consumption is moving to digital platforms.
- The election represents a growth opportunity for public radio, especially among News/Talk devotees.
- Millennials represent a huge challenge but also a major opportunity. They are strong digital users and are especially predisposed to on-demand content. And they’re the most positive about public radio programming, strongly supporting public radio core values like learning.
- Podcasting remains a solid growth opportunity, closely connected to the explosion in video on-demand consumption. Not surprisingly, Millennials are the biggest users.
- Mobile shows no signs of slowing down. Smartphones, in particular, are the pathway to reaching and connecting with Millennials.
- As is the case for all of broadcast radio, the car represents the top radio listening location, but “connected cars” provide options that are used often at broadcast radio’s expense.
- Sharing and recommendation scores are exceptional, providing public radio content creators with a strong opportunity to expand its boundaries and attract new users.