

# At The Crossroads



Jacobs

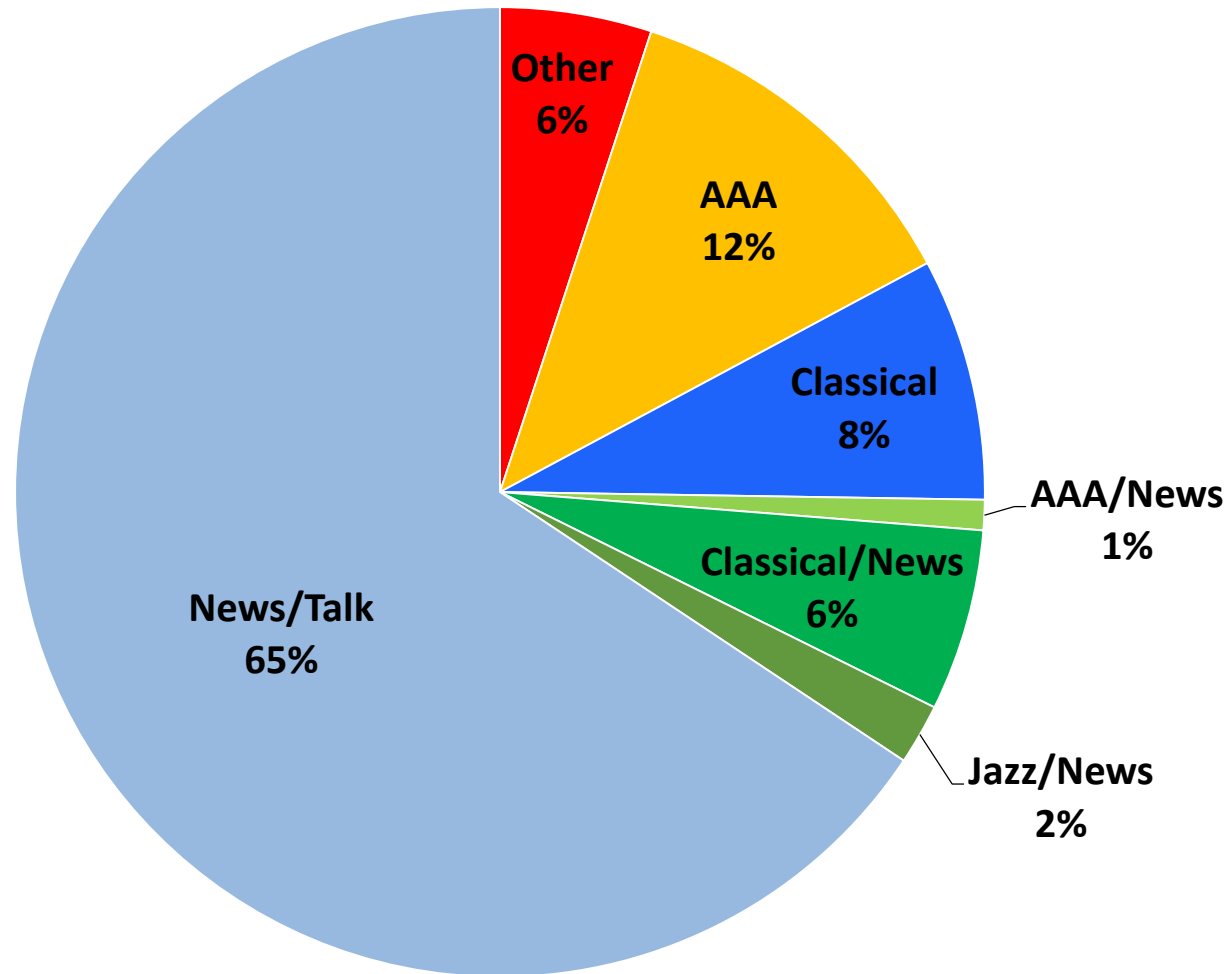
nuvoodoo 



# Methodology

- 54 public radio stations
- N = **19,730**
- Interview dates: June 15-July 20, 2015
- Most respondents are members of station email databases. Some responses were gathered via the station's website or social networking pages.
- All responses were collected online and weighted by market size.
- This is a web survey and does not represent all public radio listeners or each station's total audience.

# Format Composition

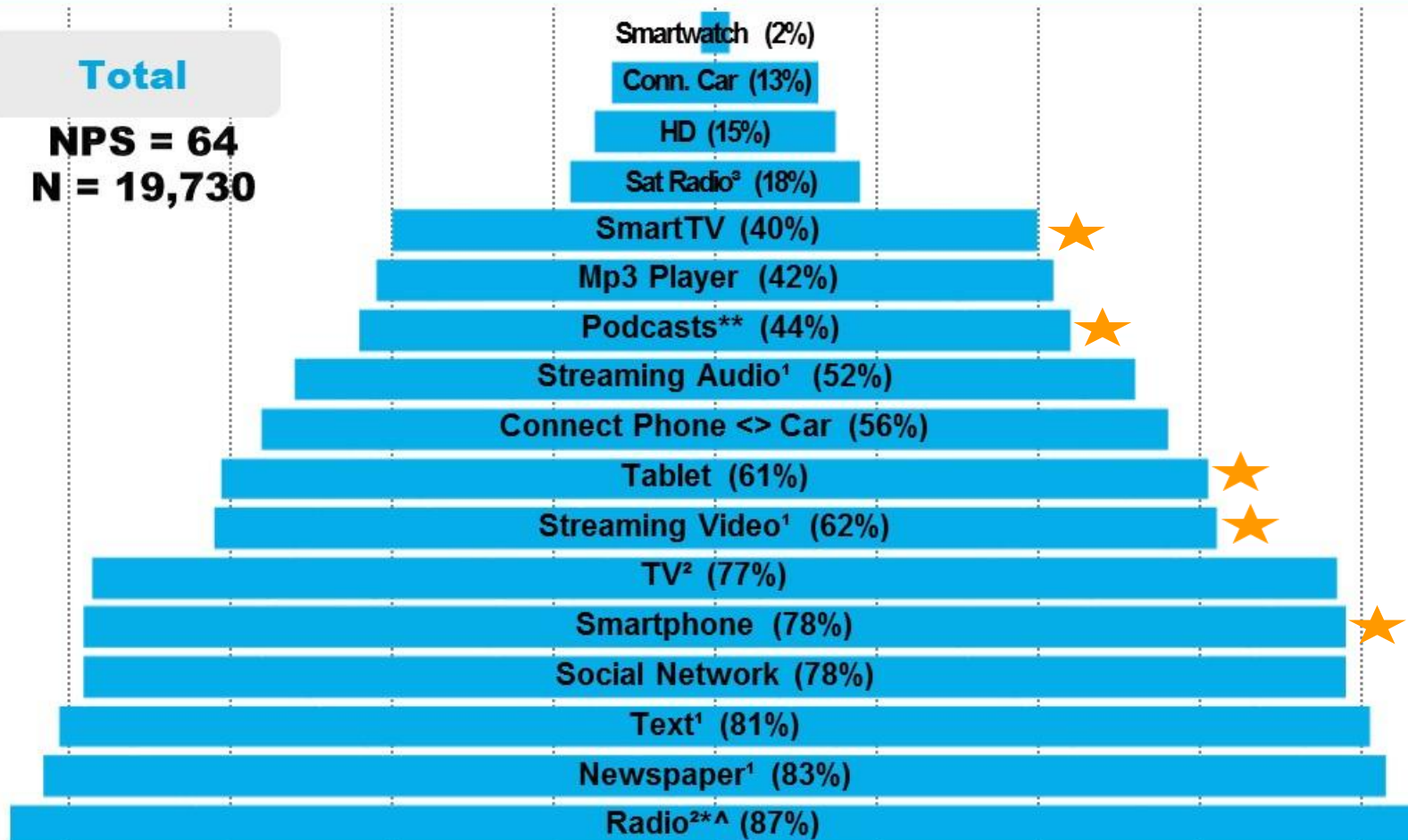




# Media Usage Pyramid 2015

**Total**

**NPS = 64**  
**N = 19,730**

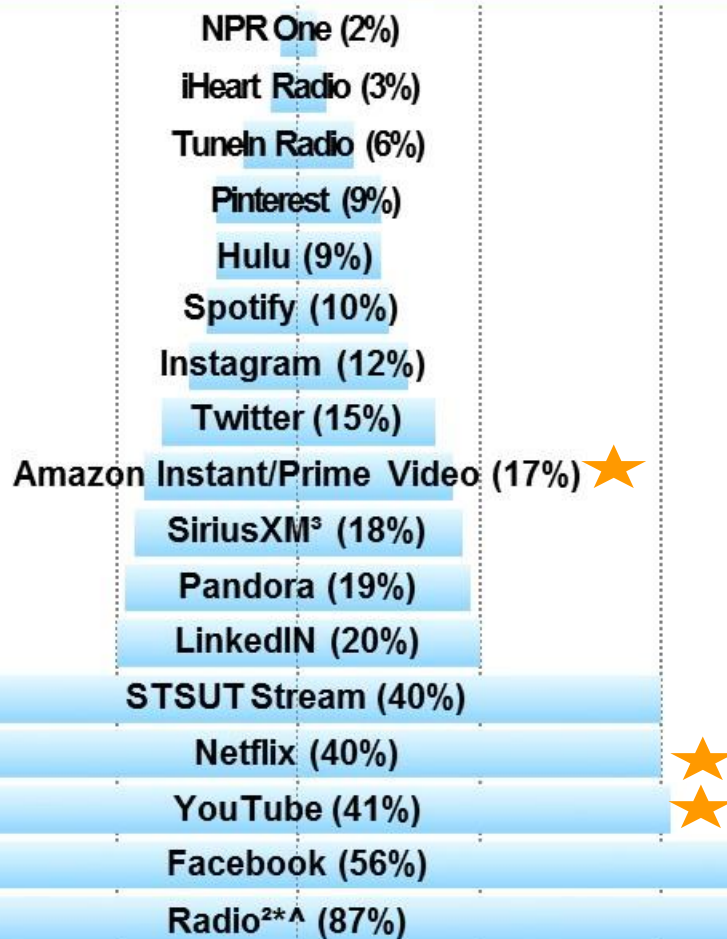


<sup>1</sup> Weekly or more <sup>2</sup> 1+ hour per day <sup>3</sup> Paid & trial users \* Any platform/device \*\* Monthly ^ Wording change

**Note: The stars represent areas of continued growth year to year. In the case of Smart TV, this is its first appearance.**

# Brand Platform Pyramid 2015

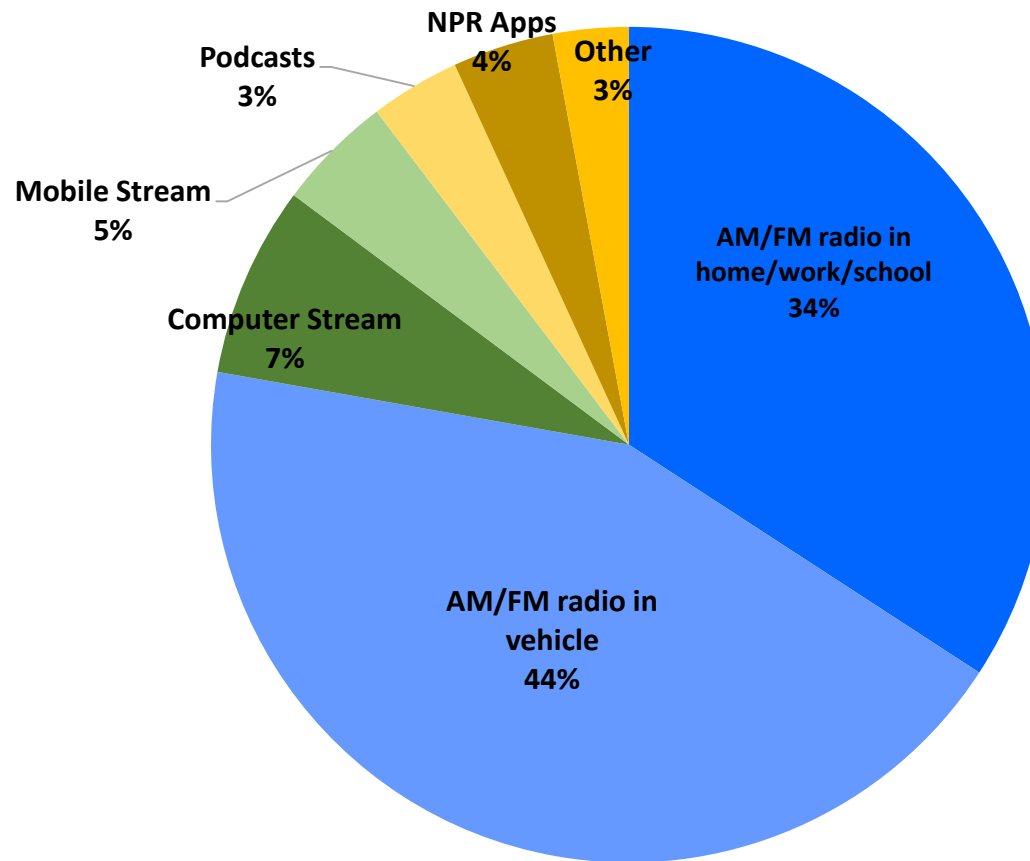
Total



All based on weekly use unless otherwise noted 1+ hour per day<sup>2</sup> Paid & trial users<sup>3</sup> Any Platform/Device\* Wording Change<sup>^</sup>

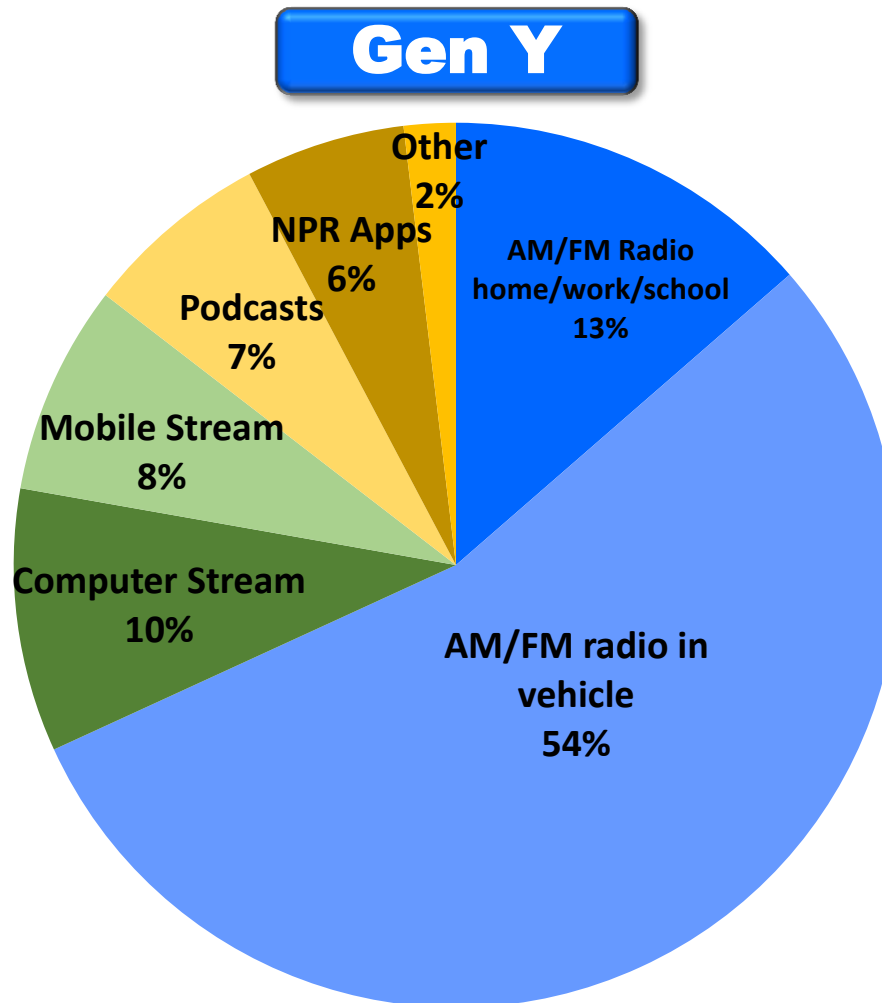
**Note: Weekly video streaming (gold stars) is higher than audio streaming channels like Pandora, Spotify & TuneIn Radio.**

# Public radio continues to make the digital transition. About one-fifth of weekly usage is on digital sources.



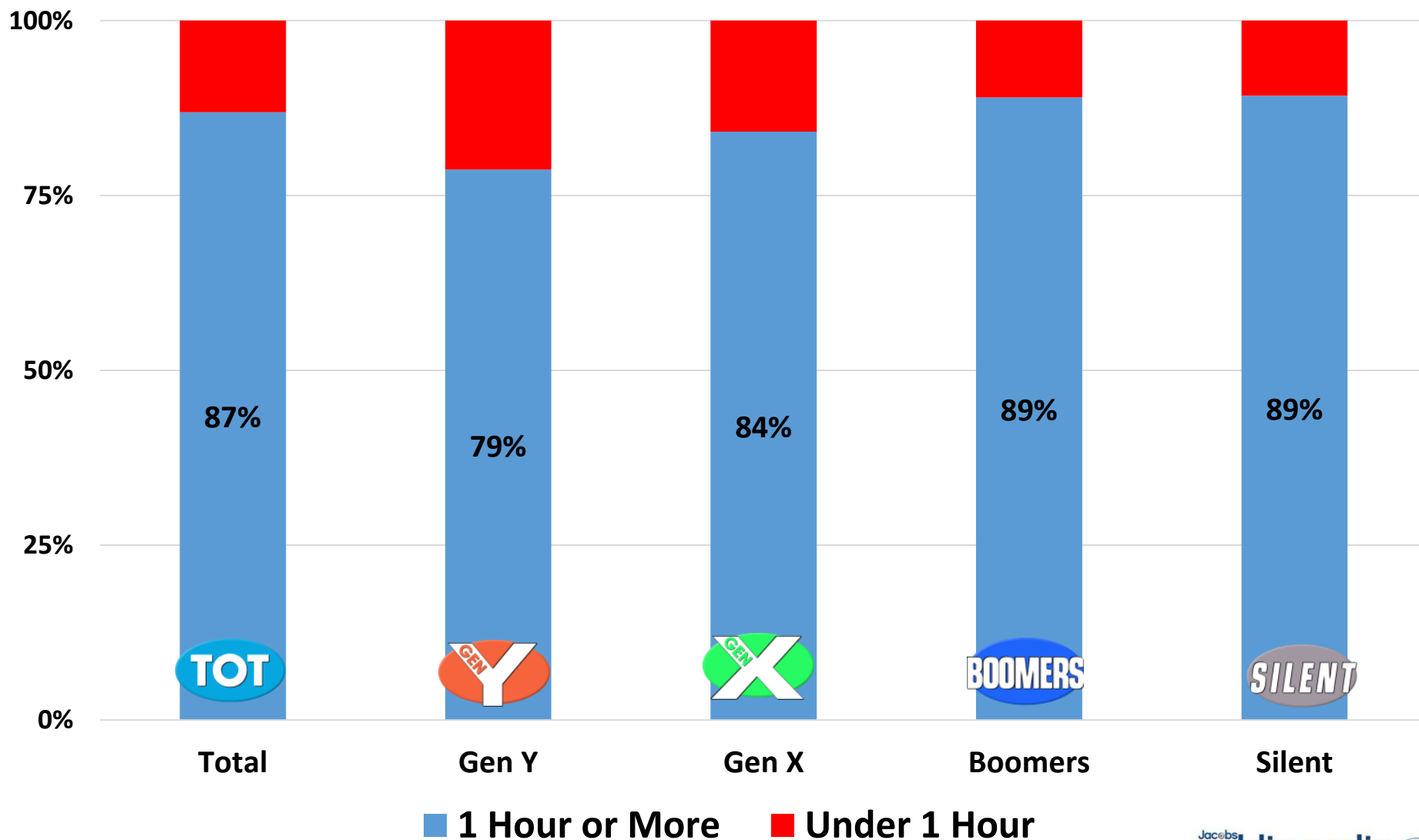
**Traditional: 78%**  
**Digital: 19%**

# Among public radio's Millennials, 30% of consumption occurs via digital channels and platforms.

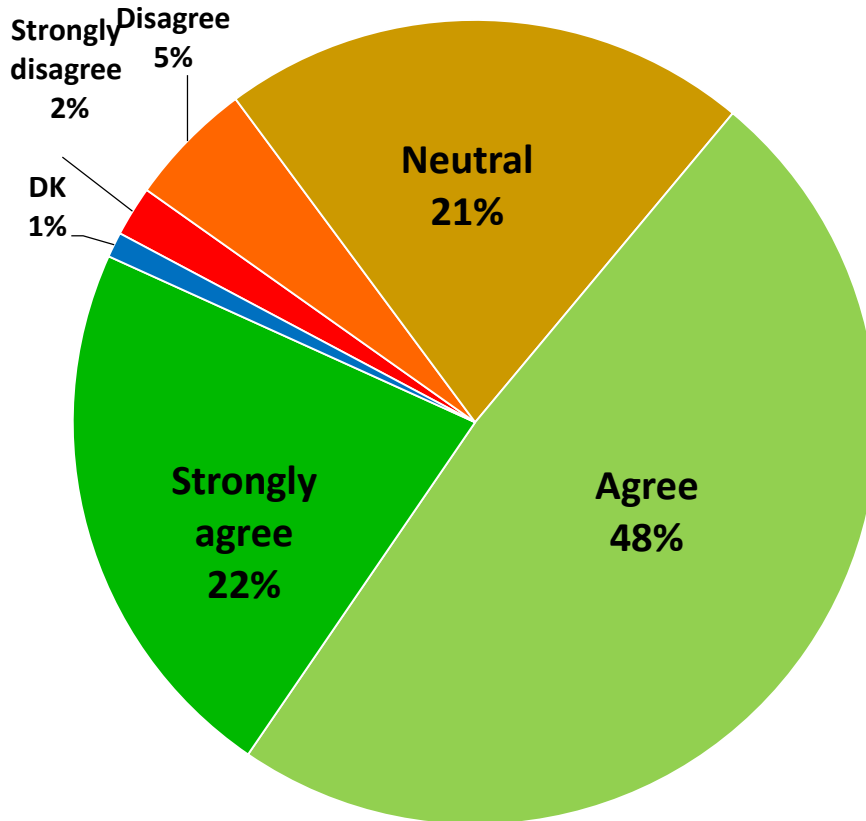


**Traditional: 67%**  
**Digital: 30%**

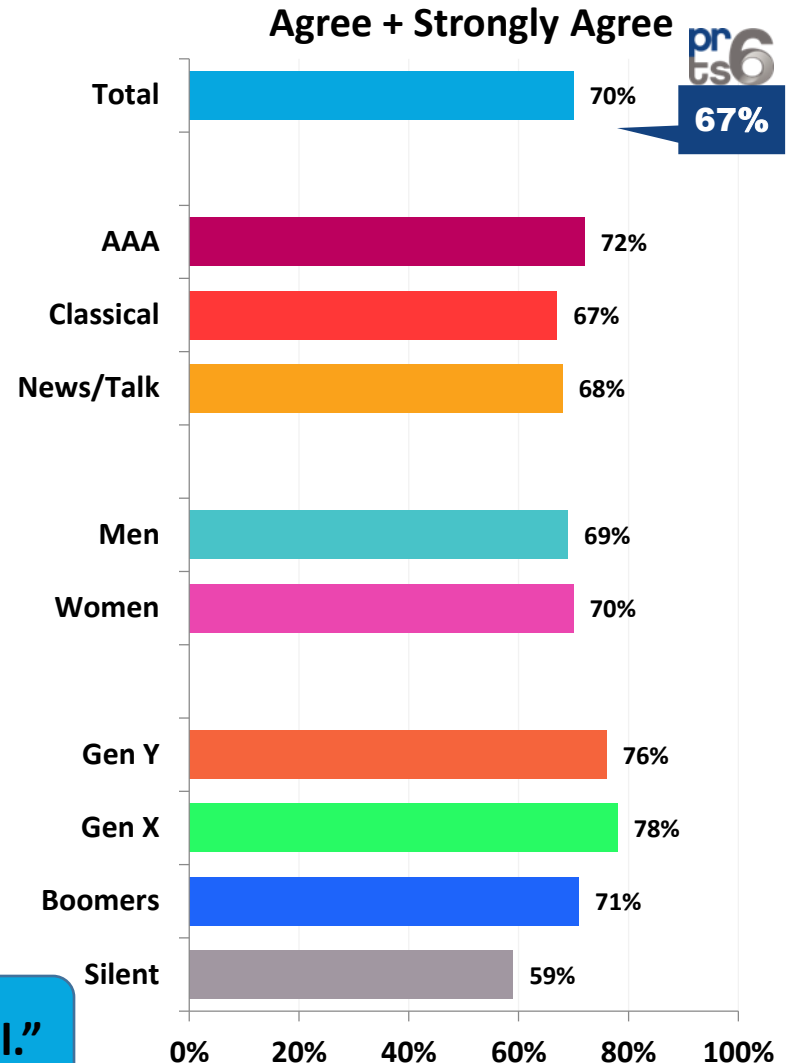
# Listenership to 1 hour of radio a day is solid across the board, with the exception of lower levels among Gen Y.



# Local matters. More than two-thirds say a key radio advantage is its local orientation.

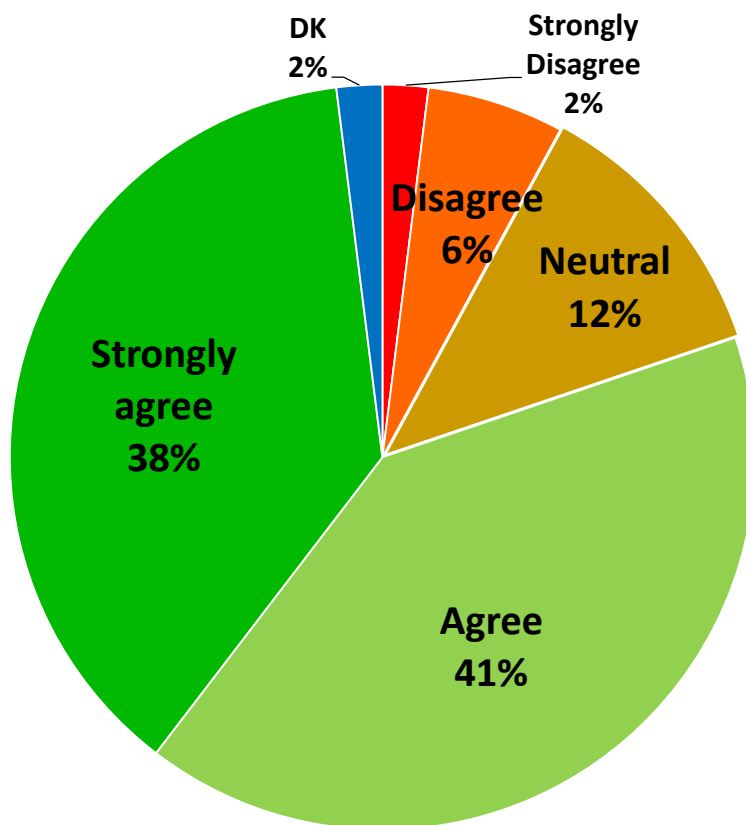


**"One of radio's primary advantages is its local feel."**

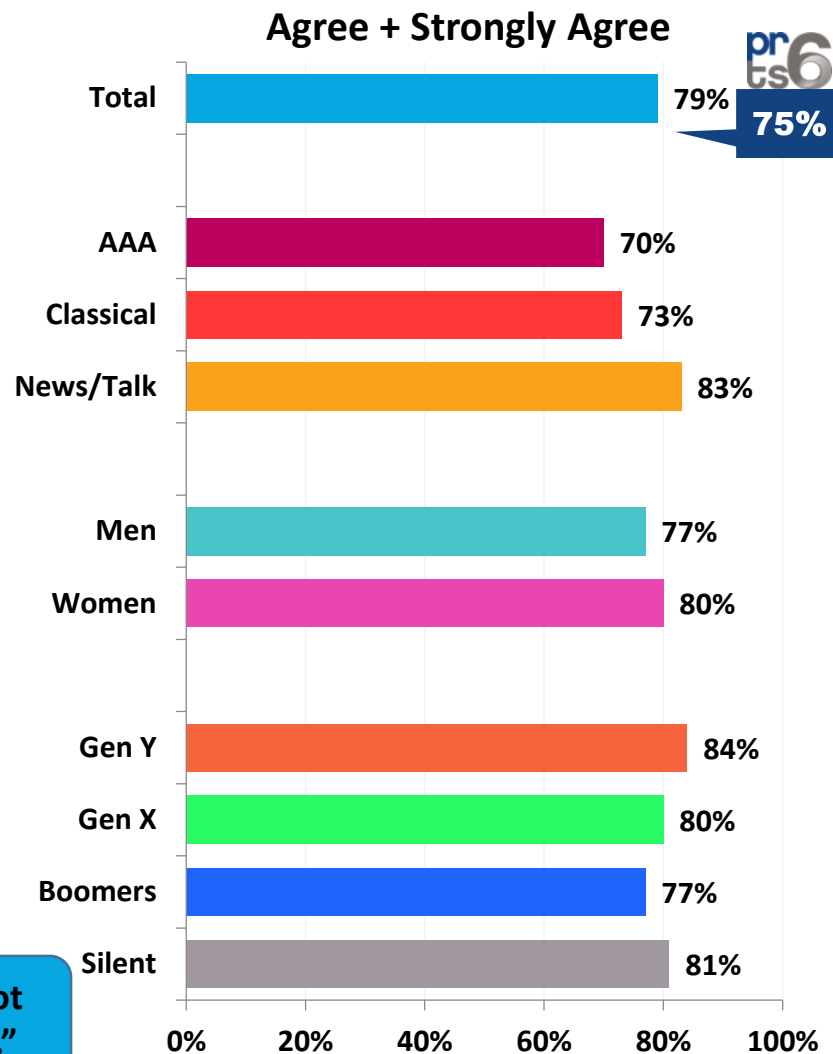


# At the core of public radio news efforts is trust.

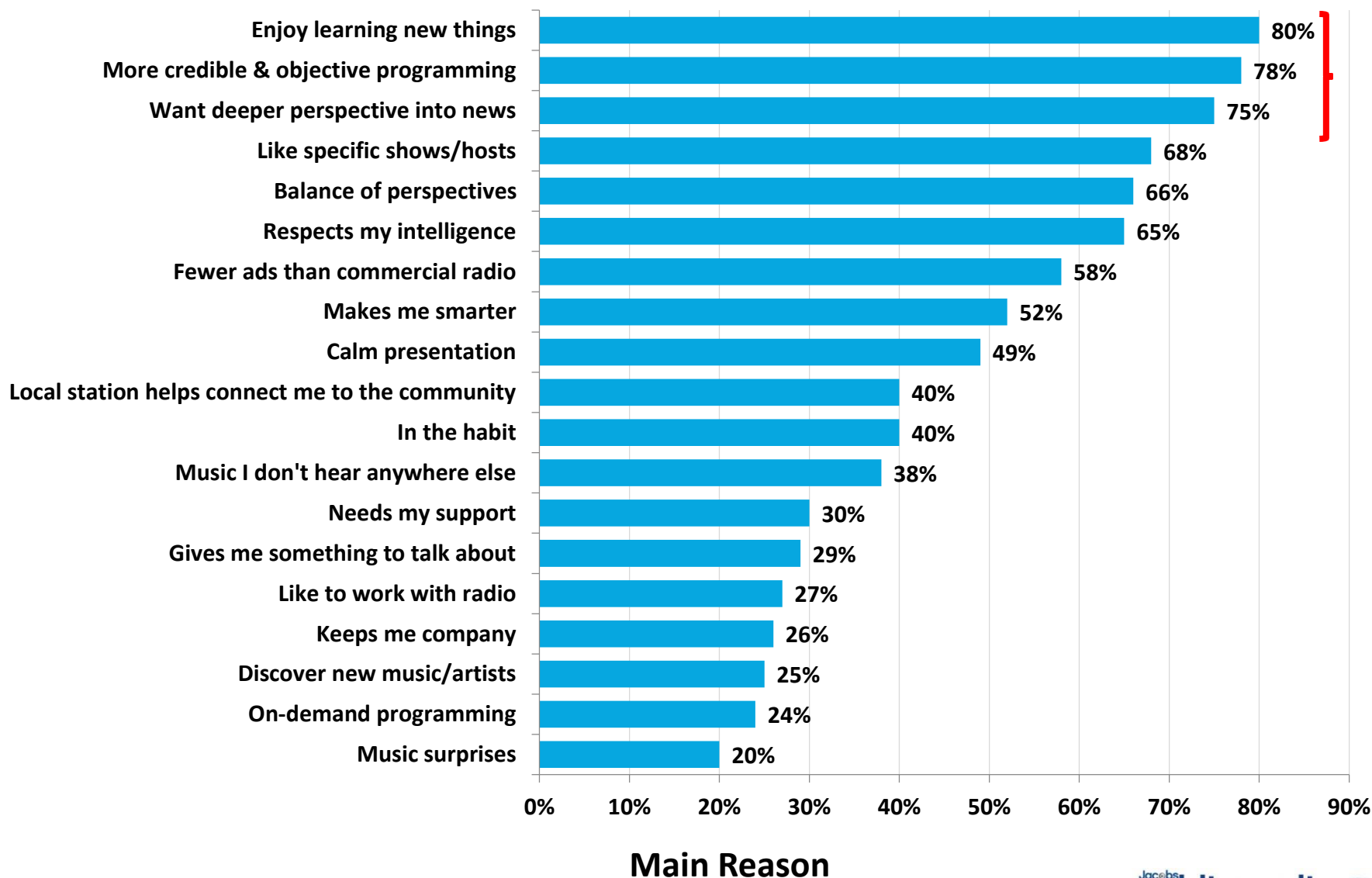
## Nearly 8 in 10 PRTS7 respondents agree the news is not influenced by sponsors or advertisers.



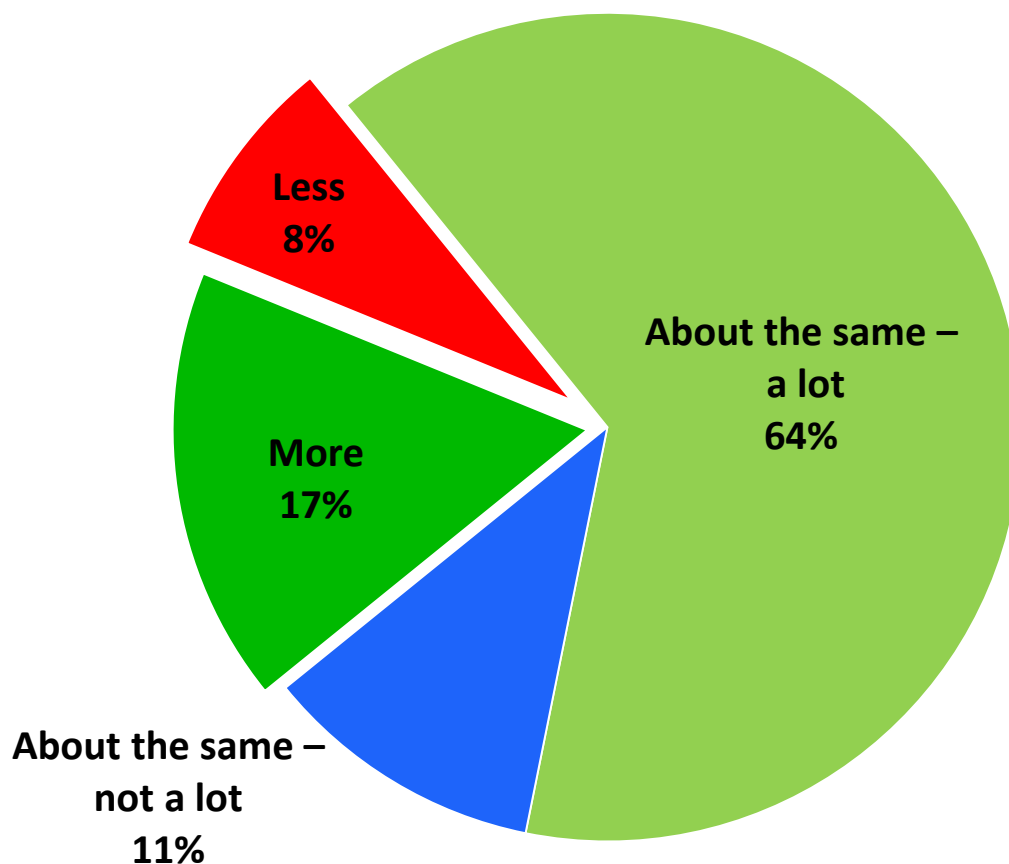
"I have an inherent trust that public radio news efforts are not influenced by advertisers and businesses that sponsor them."



# Why public radio? Learning, credibility, objectivity, & a deeper perspective into news top the list.



# Public radio has momentum. By a 2:1 margin, 17% say they've listened to more public radio in the past year.

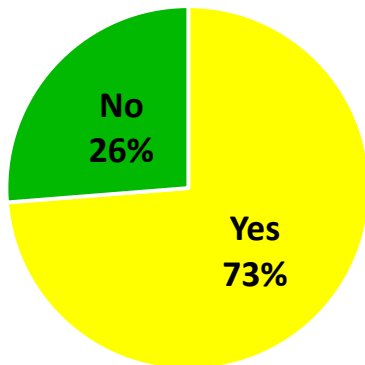


Past year on any device

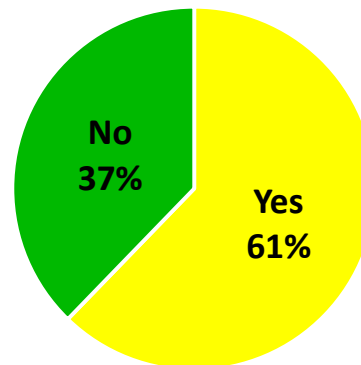
# Public radio's sustaining members tend to be younger.

## Three-fourths of Millennial members are sustainers.

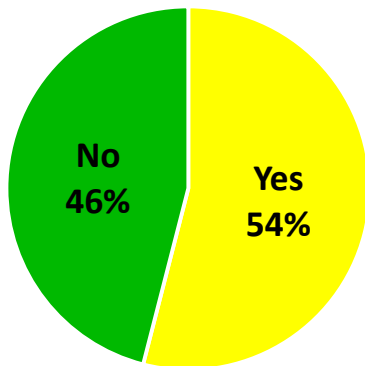
Gen Y



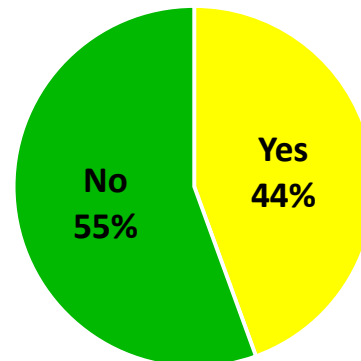
Gen X



Boomers

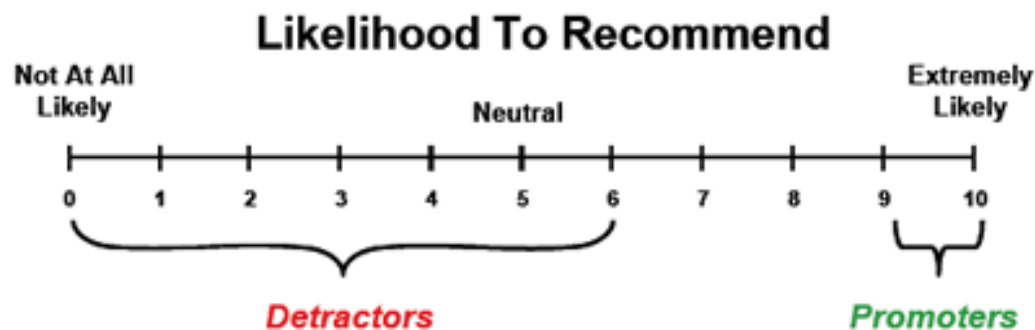


Silent



Among members

# NET PROMOTER



% Promoters

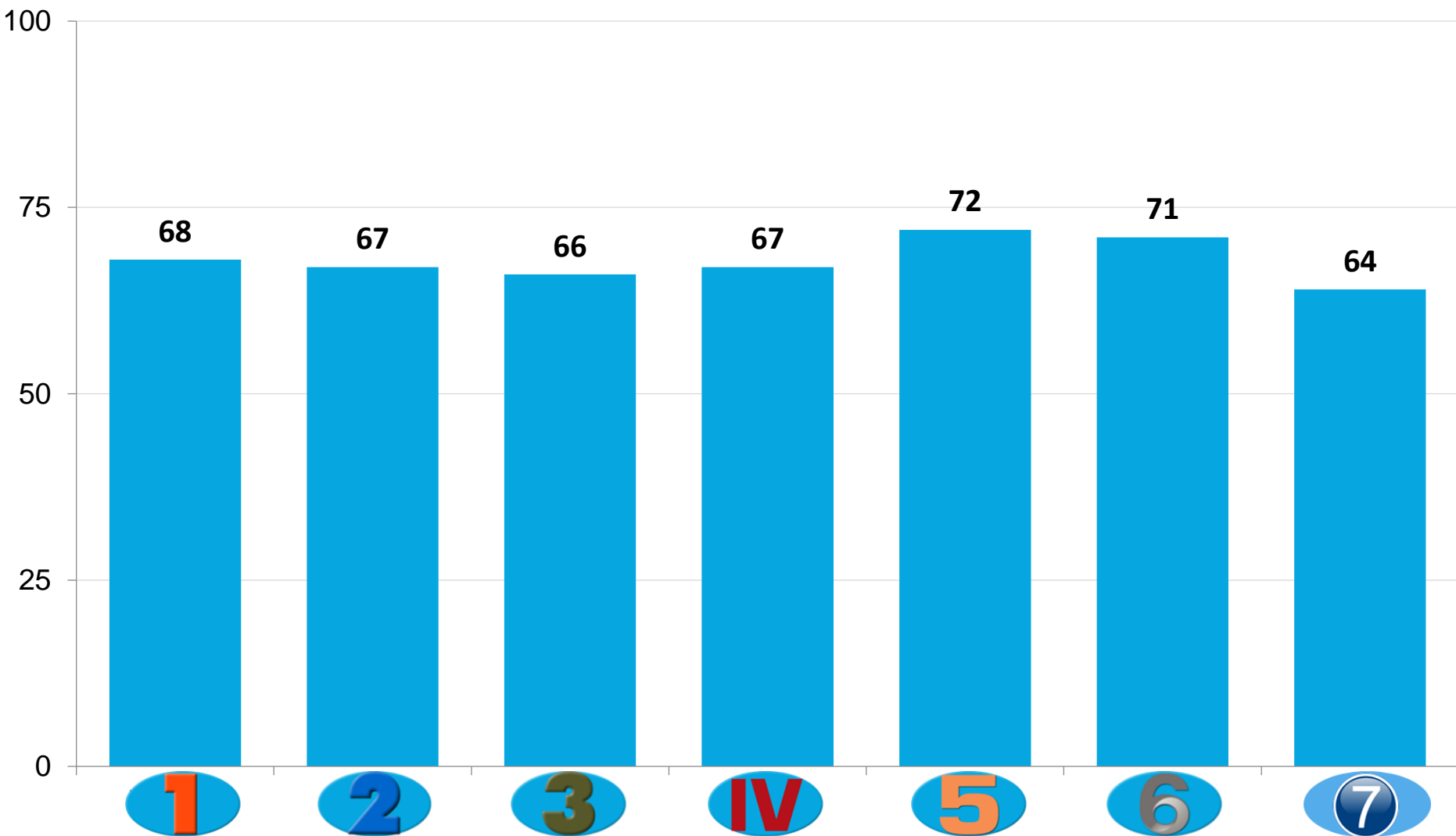
—

% Detractors

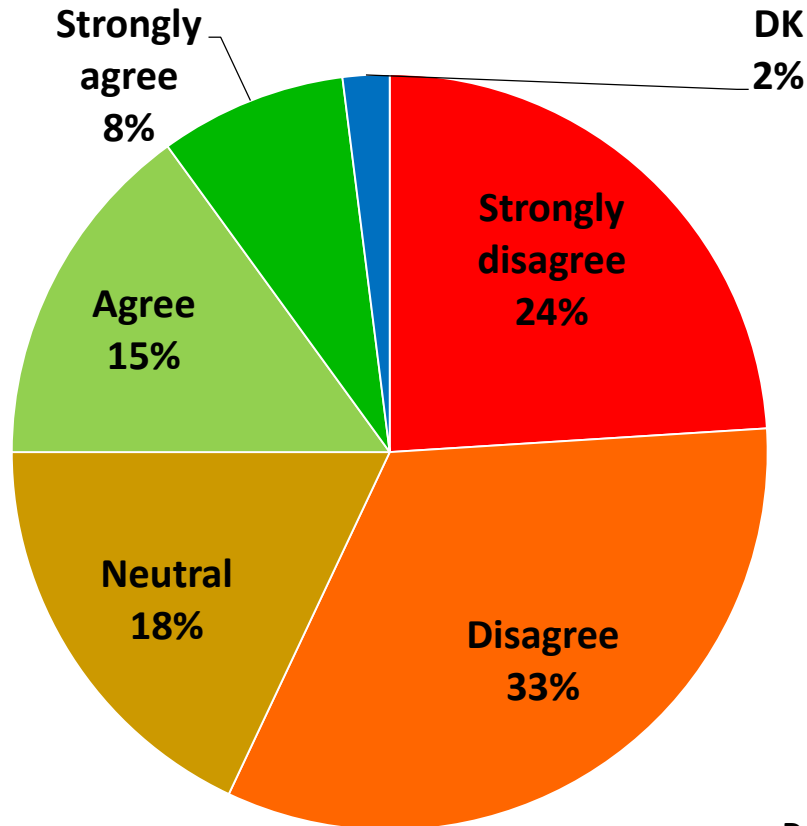
=

Net Promoter Score

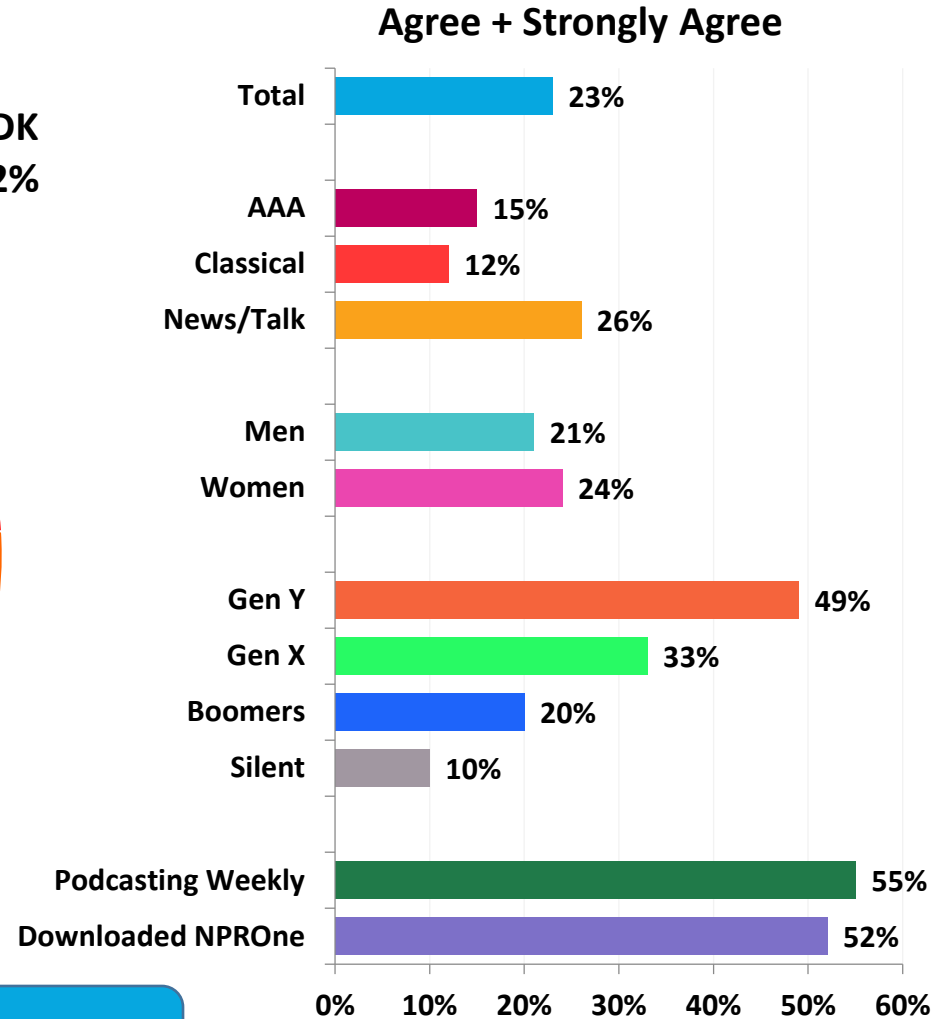
## When it comes to recommendation, public radio's scores remain stellar, although lower than in the past.



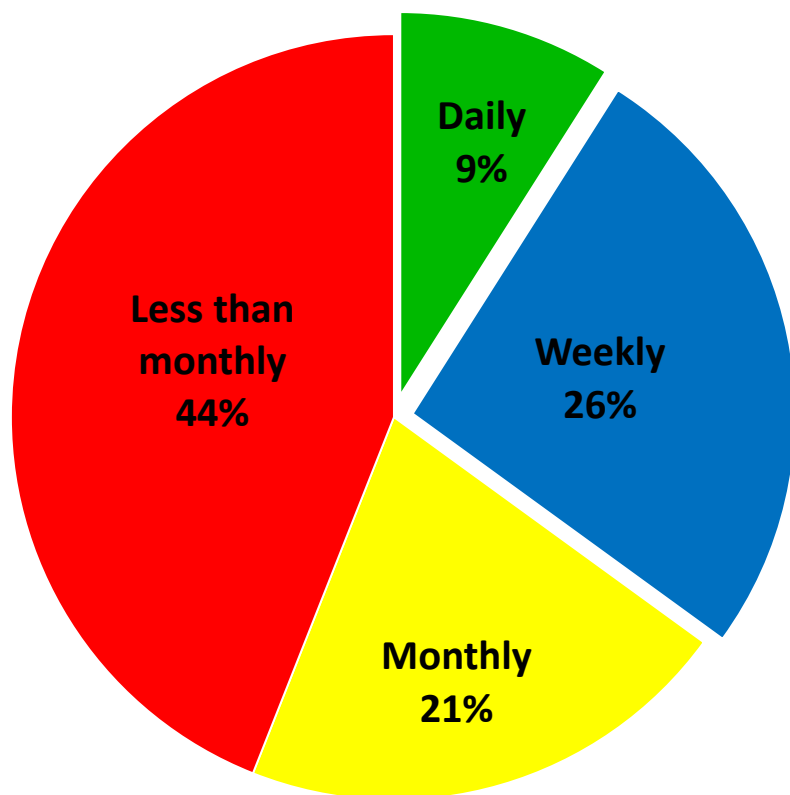
# Nearly one-fourth of public radio listeners say they're listening to more content on-demand – especially Gen Y.



**"I find myself listening to more public radio on-demand."**

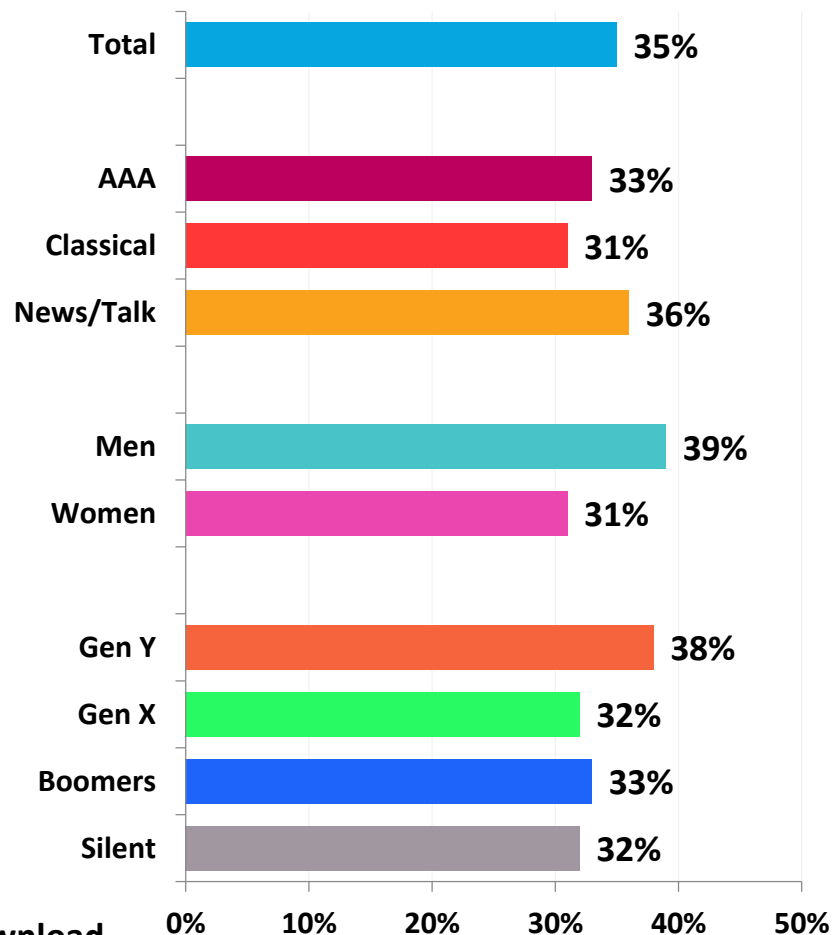


# Among those who have downloaded the NPR One app, more than a third use it weekly or more often.

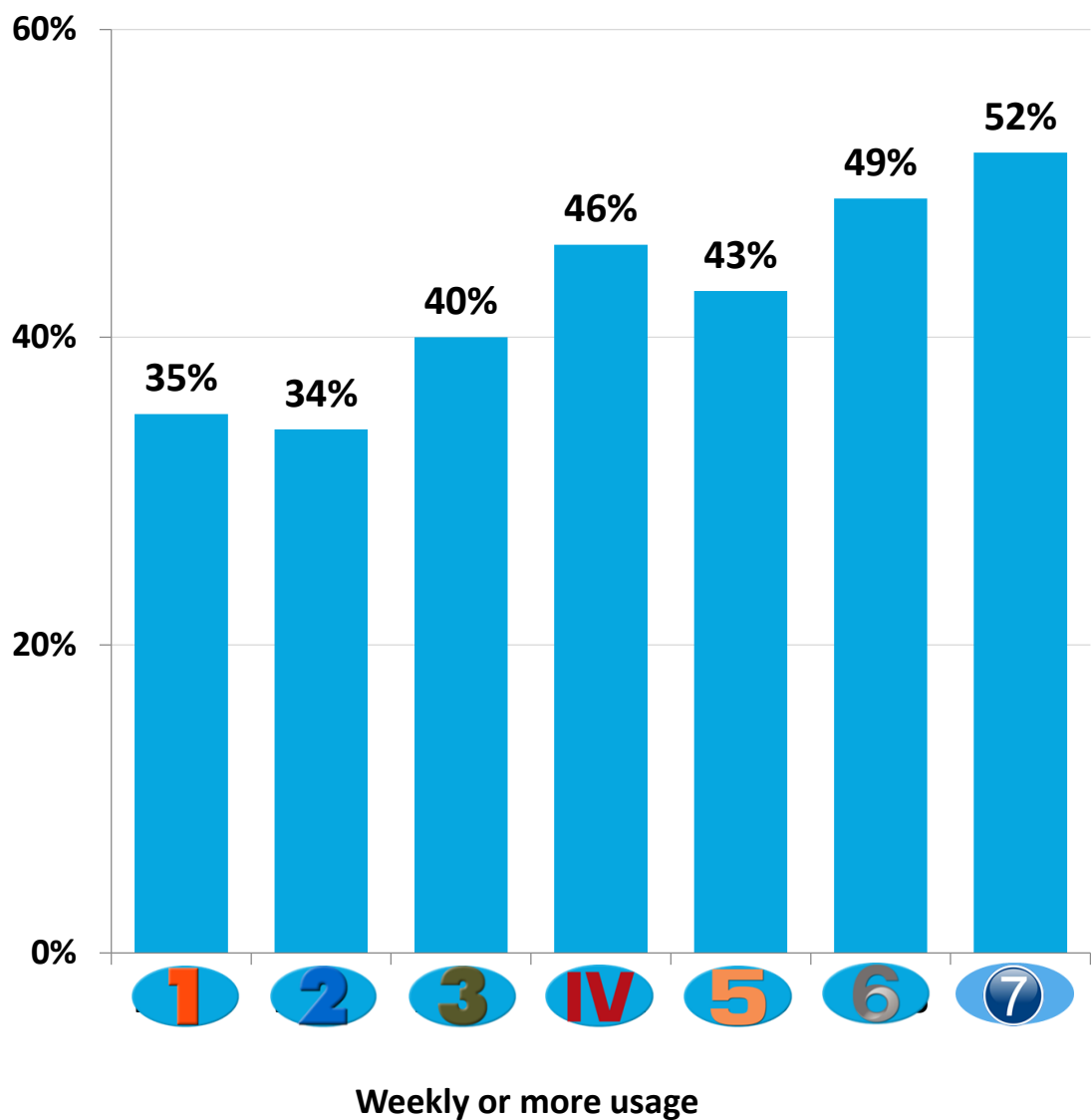


Among those with smartphones/tablets who download radio/music apps, 8% have downloaded the NPR One app.

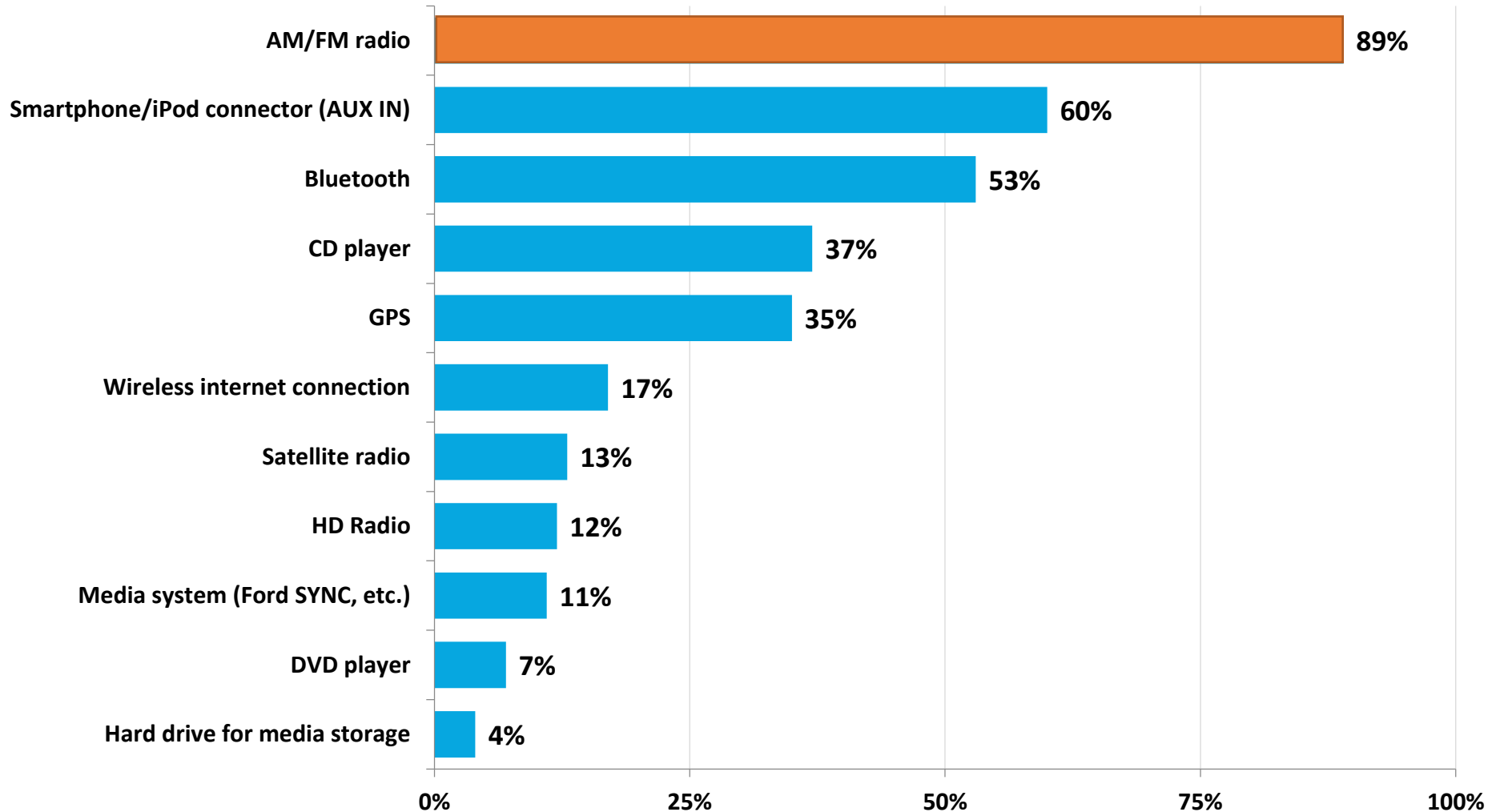
## At least weekly



**Weekly streaming continues it steady growth. Now more than half the sample streams audio weekly or more.**

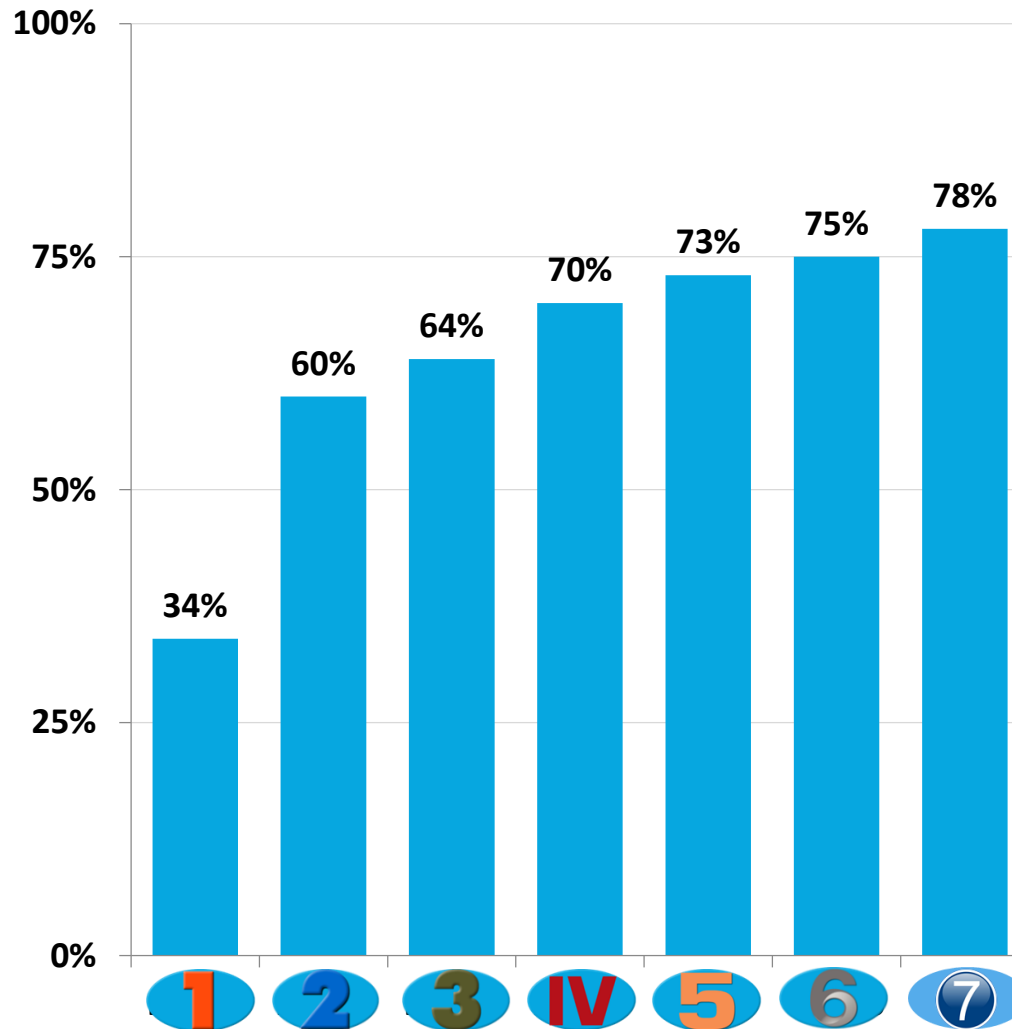


# Of those in the market for a new car in the next year, 9 in 10 say an AM/FM radio is very important.

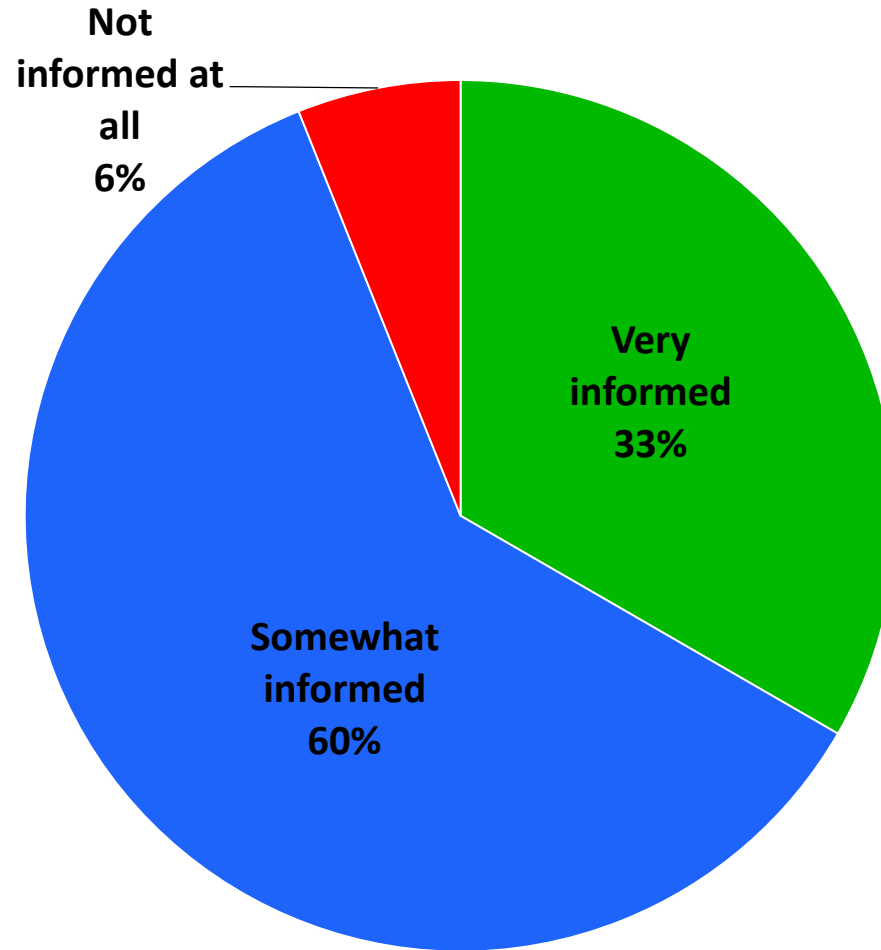


“Very Important” features among the 10% of respondents planning  
on buying/leasing a new vehicle in next 12 months

# Nearly 8 in 10 public radio listeners now has a social media profile.



**By 4pm, 9 in 10 public radio listeners say they are very/somewhat informed about the day's news stories.**



# At The Crossroads



Jacobs

nuvoodoo 

