Drive a “Connected Car!”

Think mobile!

Mind the (generation) gap!

Engage!

Create shareable content!

Extend your brand via on-demand!

Think visual!

It’s all about Apple!

Don’t be alarmed!

Guard against “creeping commercialism”

Learn your audience’s social footprint!

Move FAST!

What 161,991 People Have Made Perfectly Clear About Public Radio

#PRPD @fnjacobs
Methodology

- 54 public radio stations
- N = 26,017
- Interview dates: May 12-June 9, 2014
- 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 using their Fall ’13 metro 12+ cume audiences.
- This is a web survey and does not represent all public radio listeners or each station’s total audience.
1. Move With The Audience
Smartwatch

Total

- Not interested at all: 59%
- Somewhat interested: 27%
- Don't know: 9%
- Very interested: 6%

Very + Somewhat interested

- TOT: 33%
- AAA: 36%
- CLS: 28%
- NEWS: 34%
- MALE: 34%
- FEMALE: 32%
- Y: 45%
- X: 41%
- BOOMERS: 33%
- SILENT: 23%
2. Respect the generations
Generations

- **Silent**: 21% (≤1946)
- **Boomers**: 52% (1946-64)
- **Gen X**: 12% (1965-74)
- **Gen Y**: 12% (1975-92)
Station Listening Platforms

- Radio (home/work/school): 38%
- Radio (in vehicle): 43%
- Computer stream: 9%
- App/tablet: 3%
- App/smartphone: 3%
- Podcast/On demand: 2%
- Other: 3%

Traditional: 81%
Digital: 16%
Station Listening Platforms

- Radio (in vehicle) 52%
- Radio (home/work/school) 17%
- Computer stream 11%
- App/smartphone 2%
- App/tablet 7%
- Podcast/On demand 9%
- Other 2%

Traditional 70%
Digital 28%
Station Listening Platforms

WNYC

- Radio (home/work/school) 44%
- Radio (in vehicle) 27%
- Computer stream 10%
- App/smartphone 5%
- App/tablet 3%
- Podcast/On demand 9%
- Other 3%

Traditional 70%
Digital 27%
3. Learn Your Audience’s Social Footprint
Social Networking Profiles

Generations

- **Gen Y**: 96%
- **Gen X**: 90%
- **Boomers**: 77%
- **Silent**: 56%

1. 34%
2. 60%
3. 64%
4. 70%
5. 73%
6. 75%
Top Social Media Sites

Only among those with a profile on each platform
Social Media Daily Use

Only among those with a profile on each platform

- Vine (0%)
- Snapchat (1%)
- Foursquare (1%)
- MySpace (0%)
- Tumblr (2%)
- Instagram (6%)
- Pinterest (3%)
- Twitter (12%)
- Google+ (4%)
- LinkedIn (7%)

- Facebook (54%)
Social Media Sites

Top Sites

- Vine: 10%
- Snapchat: 9%
- Foursquare: 11%
- MySpace: 15%
- Tumblr: 16%
- Instagram: 30%
- Pinterest: 36%
- Twitter: 53%
- Google+: 55%
- Linkedin: 77%
- Facebook: 92%

Daily Use

- Vine: 0%
- Snapchat: 2%
- Foursquare: 1%
- MySpace: 0%
- Tumblr: 2%
- Instagram: 9%
- Pinterest: 4%
- Twitter: 15%
- Google+: 4%
- Linkedin: 9%
- Facebook: 61%

Left: Among those with a social media profile
Right: Among those with a profile on each platform
WXPN’s Social Media Sites

**Top Sites**

- **Vine**: 8%
- **Snapchat**: 8%
- **Foursquare**: 9%
- **MySpace**: 15%
- **Tumblr**: 13%
- **Instagram**: 29%
- **Pinterest**: 29%
- **Twitter**: 52%
- **Google+**: 51%
- **LinkedIn**: 76%
- **Facebook**: 89%

**Daily Use**

- **Vine**: 1%
- **Snapchat**: 1%
- **Foursquare**: 1%
- **MySpace**: 0%
- **Tumblr**: 1%
- **Instagram**: 11%
- **Pinterest**: 3%
- **Twitter**: 20%
- **Google+**: 3%
- **LinkedIn**: 10%
- **Facebook**: 61%

Left: Among those with a social media profile
Right: Among those with a profile on each platform
Social Media Sites

Top Sites

- Vine: 5%
- Snapchat: 5%
- Foursquare: 6%
- MySpace: 9%
- Tumblr: 11%
- Instagram: 16%
- Pinterest: 25%
- Twitter: 39%
- Google+: 45%
- LinkedIn: 74%
- Facebook: 90%

Daily Use

- Vine: 0%
- Snapchat: 1%
- Foursquare: 1%
- MySpace: 0%
- Tumblr: 2%
- Instagram: 3%
- Pinterest: 2%
- Twitter: 8%
- Google+: 5%
- LinkedIn: 7%
- Facebook: 49%

Left: Among those with a social media profile
Right: Among those with a profile on each platform
Social Media Sites

Top Sites

- Vine: 6%
- Snapchat: 7%
- Foursquare: 8%
- MySpace: 11%
- Tumblr: 14%
- Instagram: 24%
- Pinterest: 35%
- Twitter: 53%
- Google+: 54%
- LinkedIn: 79%
- Facebook: 92%

Daily Use

- Vine: 0%
- Snapchat: 1%
- Foursquare: 1%
- MySpace: 0%
- Tumblr: 2%
- Instagram: 6%
- Pinterest: 3%
- Twitter: 12%
- Google+: 4%
- LinkedIn: 7%
- Facebook: 53%

Left: Among those with a social media profile
Right: Among those with a profile on each platform
Main Reasons For Enjoying Each Platform Among those with a profile on each platform

- Interact with celebs/newsmakers
- Prizes
- Keep up with sports
- "Like"/follow brands/companies
- "Like"/follow people of interest
- Keep up with music
- Funny/quirky content
- Make comments/re-Tweet
- Keep up with news/info
- Discover interesting things
- Share thoughts
- Share content
- Share things of interest
- Connect with friends/family
4. Understand How Your Audience Wakes Up
“Another Way” is overwhelmingly: “I just wake up/wake up naturally” Among those who own a cell phone.
Waking Up – A Generational Story

Among those who own a cell phone

- Clock Radio Combo:
  - Gen Y: 43%
  - Gen X: 45%
  - Boomers: 36%
  - Silent: 26%

- Phone Combo:
  - Gen Y: 62%
  - Gen X: 37%
  - Boomers: 20%
  - Silent: 10%
5. Buy/lease/rent/test drive a “Connected Car”
Heavy In-Car Radio Listening

![Bar chart showing radio listening percentages by generation]

Generations:
- Generation Y: 56%
- Generation X: 50%
- Boomers: 37%
- Silent: 26%

Slight wording change in PRTS6
Connect Mobile Phone/Mp3 In The Car

58% TOT

73% GEN

69% CELL

59% Boomers

46% Silent
Connected Car

Generations

- **Gen Y**: 12%
- **Gen X**: 15%
- **Boomers**: 17%
- **Silent**: 17%
Impact Of Connected Car

Among those with an in-car entertainment system:

- **NEws**: 22%
- **CLS**: 21%
- **AAA**: 27%
- **Less 23%**
- **Same - not a lot 16%**
- **Same - a lot 56%**
- **More 5%**

Generations:

- **BOOMERS**: 23%
- **SILENT**: 14%
- **GEN Y**: 30%
- **GEN X**: 34%

[jacob's public radio techsurvey logo]
Platforms Used More

Among those with an in-car entertainment system

- SiriusXM: 49%
- Personal music library: 44%
- Apps (smartphone): 25%
- Books on tape: 15%
- Apps (built-in): 13%
- CD player: 7%
“Very Important” features among the 8% of respondents planning on buying/leasing a new vehicle in 2014
6. Be wary of “creeping commercialization”
Why Public Radio?

Main Reasons

- Being surprised by music (16%)
- Discover new music (20%)
- It keeps me company (23%)
- Something to talk about (26%)
- Like to work with radio (26%)
- Just in the habit (31%)
- Music I don’t get anywhere else (37%)
- It needs my support (38%)
- Presentation is calm (50%)
- Makes me smarter (56%)
- Fewer ads (62%)
- A balance of perspectives (64%)
- Shows & hosts (64%)
- Respect my intelligence (73%)
- Enjoy learning new things (76%)
- Deeper news perspective (78%)
- More credible programming (80%)
“Public radio is the most objective news source available on the radio.”
“I have an inherent trust that public radio news efforts are not influenced by advertisers and businesses that sponsor their programming.”
Fear Of “Creeping Commercialization”

“I get concerned about creeping commercialization in public radio.”

- **Total**
  - Agree 37%
  - Strongly Agree 15%
  - Disagree 16%
  - Strongly Disagree 4%
  - Neutral 26%

**Agree + Strongly Agree**
- TOT: 53%
- AAA: 53%
- CLS: 50%
- NEWS: 53%
- MALE: 56%
- FEMALE: 50%
- YOUTH: 45%
- BOOMERS: 49%
- SILENT: 55%
7. Focus on content that’s easily shareable
KCRW 89.9

WE'RE NOT JUST ON THE AIR
WE'RE IN THE AIR

MUSIC | NEWS | CULTURE | MPR
Net Promoter

Likelihood To Recommend

% Promoters - % Detractors = Net Promoter Score
Net Promoter Score

43%
“Everybody in the audience has an audience.”
Frequent Sharing

“How often do you share, click ‘like,’ or re-tweet things you see on any websites, Facebook or Twitter?”
8. Foster Audience Engagement
Frequent Interaction With Public Radio

- Email: 20%
- Computer stream: 15%
- Mobile apps: 15%
- Mobile stream: 15%
- Podcasts: 15%
- Website: 10%
- Facebook: 10%
- HD Radio: 10%
- Twitter: 10%
- Videos: 10%
- Blogs: 10%
- Events: 10%
- Texting: 10%

Frequent responses only
Frequent Interaction With Public Radio

- Email
- Computer stream
- Mobile apps
- Mobile stream
- Podcasts

Frequent responses only
9. Local matters
Why AM/FM Radio?

1. News/WX/ TX (73%)
2. Shows & hosts (60%)
3. Local info (51%)
4. Talk shows (38%)
5. Hear favorite songs (35%)
6. Just in the habit (31%)
7. Keep me company (28%)
8. Emergency info (24%)
9. Discover new music (22%)
10. Being surprised by music (17%)
11. Get in a better mood (13%)
12. Escape pressures of life (10%)
13. Station charitable events (9%)

Main Reasons

- News/WX/TX (73%)
- Shows & hosts (60%)
- Local info (51%)
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- Discover new music (22%)
- Being surprised by music (17%)
- Get in a better mood (13%)
- Escape pressures of life (10%)
- Station charitable events (9%)
“One of radio’s primary advantages is its local feel.”
10. Extend your brand

[Image]
“I find myself listening to more public radio programming on-demand.”
Podcasting/On-Demand Audio

Among those who have downloaded podcasts/on-demand programming in the past month.
11. Get visual
Weekly Video Streaming

Top Platforms

- YouTube: 71%
- Facebook: 67%
- Netflix: 43%
- Your Station: 25%
- NBC: 24%

Among smartphone & tablet owners
12. Think mobile first
“I am addicted to my mobile phone.”

Among those with a cell phone
Smartphone Ownership

Among total responses

- TOT: 71%
- MALE: 71%
- FEMALE: 72%
- Y: 91%
- X: 87%
- BOOMERS: 73%
- SILENT: 50%
- MEMBERS: 72%
- NON-MEMBERS: 66%
- AAA: 78%
- CLS: 60%
- NEWS: 73%
Weekly Texting

Generations

Among total respondents
Different response set in PRTS6

- Generation Y: 97%
- Generation X: 92%
- Boomers: 75%
- Silent: 42%
Among smartphone & tablet owners who download apps
Top Radio Apps

Among smartphone & tablet owners who download apps

N = 1,259
13. It’s An Apple World
Among those who own a smartphone
Multiple responses permitted
Tablet Ownership

Among those who own a tablet – multiple responses

- iPad 66%
- Kindle Fire 15%
- iPad Mini 13%
- Android 12%
- Nook 6%
- Other 4%
- Google Nexus 4%
- Microsoft 3%
A Baker’s Dozen Takeaways

1. Move (quickly) with the audience
2. Mind the (generation) gap
3. Learn your audience’s social footprint
4. Understand how your listeners wake up
5. Buy/lease/rent/test drive a connected car
6. Guard against “creeping commercialization”
7. Focus on content that’s shareable
8. Foster audience engagement
9. Local matters
10. Extend your brand
11. Get visual
12. Think mobile first
13. It’s an Apple world
What 161,991 People Have Made Perfectly Clear About Public Radio

- Drive a “Connected Car!”
- Think mobile!
- Mind the (generation) gap!
- Don’t be alarmed!
- Engage!
- Create shareable content!
- Extend your brand via on-demand!
- Think visual!
- It’s all about Apple!
- Guard against “creeping commercialism”
- Local matters!
- Learn your audience’s social footprint!
- Move FAST!

#PRPD @fnjacobs