

Millennial Research Project

Summary Report

July 2017

Project Overview

In July 2016, the Public Radio Program Directors Association selected Jacobs Media to create and execute a study on the behaviors and attitudes of the Millennial generation towards public radio. While there is an abundance of statistical research data about Millennials, it was determined that in order to truly understand this large and complex generation, a more qualitative approach was required.

The MRP was designed as a two-phase initiative:

One-On-One Interviews (August 25-September 15). Jacobs Media conducted a series of 25 one-on-one videotaped interviews among Millennials. A total of 16 Millennial public radio listeners were selected from the databases of five public radio stations, and 9 non-public radio listeners were recruited by an independent research company in these same five markets with the home public radio station in parentheses:

1. St. Louis (KWMU)
2. Phoenix (KJZZ)
3. Austin (KUT)
4. New York City (WNYC)
5. Ann Arbor (WUOM)

The interviews lasted approximately 40 minutes and were exploratory in nature. The goal of this phase was to cover a great deal of ground about media and information habits designed to help inform the scope of the ethnographic phase of the project.

Of the 25, 13 were females and 12 were males. Additionally, 4 were Latinos and 2 were African-American.

Ethnography (November 3 – February 10). Jacobs Media conducted a series of 12 ethnographic encounters among Millennials recruited from the Facebook pages of 4 public radio stations:

1. Chicago (WBEZ)
2. Los Angeles (KPCC)
3. Grand Rapids/Detroit (WUOM)
4. Charlotte (WFAE)

These videotaped encounters began each morning at the respondent's home soon after they awakened. Our observational team spent an entire day with each respondent, which included commuting, time spent at work, walking their dogs, eating meals, and other routine activities. Our day ended with an on-camera interview that included a pre-set questionnaire as well as additional questions about observed behaviors and actions.

By recruiting via Facebook rather than membership databases, we were able to access respondents who were average public radio consumers. There were few restrictions on the recruiting. Respondents were required to designate the aforementioned public radio station as their preferred outlets for news and information. There were no restrictions on device ownership or usage.

The result of this phase was a diverse mix of respondents in age, ethnicity, and lifestyle. Of the 12 ethnographic respondents, two were Latino and two were African-American. We achieved a 50:50 split with males and females.

Goals

There were three primary goals of the Millennial Research Project:

1. Develop knowledge and insight into the attitudes, awareness, and expectations of the Millennial generation regarding public radio, the news media in general, and media and content distribution.
2. Provide public radio stations with the insights to help develop a system-wide Millennial strategy.
3. Build foundational knowledge about Millennials' attitudes about public radio to be utilized in future phases of this project.

Key Findings

Based on the 12 ethnographic interviews, here are the main takeaways from this phase of the MRP:

There is no “Millennial” archetype. Stereotypes about “Millennials” – a group that is generalized as lazy, ambivalent, and addicted to technology – often don’t apply to these respondents. Most are just getting started in their careers, and are already working in real jobs, ranging from furniture design to teaching to social work.

They aren’t technology nerds. While they are all clearly comfortable with many modern gadgets, they tend to use the technology they need and treat it like electricity. They use the devices they need to achieve their media and information goals.

They are also clearly engaged in the world around them, consuming a great deal of news and information. These respondents tend to be very conversant about the critical issues of the day. If the stereotype of Millennials is “slackers,” that description didn’t apply to the participants in this project.

We interviewed the different shades of Millennials: college students in their late teens as well as moms in their thirties. There are multiple differences in their approach, outlook, and even the amount of time available to consume media. Therefore, looking at this generation monolithically provides a limited view because Millennials are a large, diverse group of people with varying media and technology habits.

There are strong feelings and high expectations for public radio. Despite the fact all respondents are public radio listeners, there are strong feelings – both positive and cautionary – that are in the process of taking shape in a rapidly moving political and journalistic environment.

Participants hold public radio in the highest regard and commonly compare it favorably with the most credible news outlets. These attitudes have been amplified since the election, as most feel the quality of journalism provided by public radio has become even more essential.

Public radio’s approach is appreciated, and once again defying the stereotype. There is little taste for changing or energizing the calm, measured non-sensational style. In fact, these MRP respondents value and describe public radio using much the same language as previous generations, commonly using phrases like “it’s a connection to the world,” “it’s not sensational, it’s civil,” it provides “lifelong learning,” and is “the least partisan way of staying informed about things that matter.”

While general attitudes and opinions about public radio are overwhelmingly positive, there are also complaints public radio sometimes “pull its punches” by not asking tougher questions and demanding greater accountability of interviewees and guests.

These feelings have intensified since the election, especially when a public radio host is interviewing a politician or guest affiliated with the new administration. While many are listening to more public radio since the election to stay on top of the daily occurrences, others are drifting to other media and programs like *Democracy Now*, generally thought to be much more aggressive uncovering important topics and holding guests to account.

Smartphones are the center of their digital and media universe. iPhones and Android devices have become a permanent fixture in their lives, and are the primary conduit for accessing audio, video, social media, podcasts, and other content. The smartphone is the one device that is always with them and fits what they require from the media they consume – portability, accessibility, and control over the content they choose to access.

While respondents appreciate public radio content, reliance on an AM/FM radio to access programs is situational – primarily, in the car. The smartphone has emerged as the primary device used to listen to public radio content, and there is no reason to believe this trend won't continue in the future.

Participants tend to have downloaded several media apps on their phones, including news organizations (*New York Times*, *Washington Post*, *The Economist*, *The Atlantic*), public radio (NPR, local public radio stations, and individual programs such as *This American Life*), as well as podcast apps.

While several have an app for their local public radio station, awareness of these applications tends to be low while details are spotty. Several are unaware whether their hometown public radio station has an app available, while others who have downloaded the app tend to only use the stream function, displaying little knowledge of other app functionality and features.

Several respondents use the NPR News app and appreciate the ability to switch stations as well as access the news summary feature. On the other hand, awareness of NPR One tends to be low, and some of those who have sampled the app have experienced issues with its functionality.

The traditional definition of “radio” does not apply. As smartphones have surged as a media hub, use of actual AM/FM radios has declined. Only two of the dozen ethnographic respondents own a “real radio” in their homes (both were clock radios in the bedroom). Instead, real-time “radio” listening often takes place via a mobile device or secondarily, via a stream on a laptop or desktop computer. These respondents consider listening to the stream as synonymous with listening to radio.

As mentioned, observed listening to actual broadcast radio took place only in their cars, usually during the workday commute or while running errands. But even in the car,

listening to live radio was shared in some instances with pre-downloaded podcasts, Spotify, and other content.

Beyond listening to *Morning Edition*, there appears to be little listening to public radio content in real time. We observed a significant amount of on-demand listening to public radio programs via streams, websites, podcasts, and NPR's News Brief to hear headlines. This calls into question the value of live radio's historic structure of creating a program schedule and setting listening appointments for this generation.

News access tends to decline during the day. Despite the wide variety of markets and individuals we encountered, there is a fairly clear pattern of news access patterns throughout the day. Most wake up and check their phones for news headlines and social media, and some listen to *Morning Edition* while getting ready for work on their laptop or smartphone. While driving to work, it was common to observe listening to *Morning Edition* on their car radios.

However, when work began, news consumption decreased as they got involved in the workday. It was not uncommon to observe several hours where a respondent didn't access any news information while focusing on their jobs. Others would occasionally check headlines on their phone, or upon receiving a push notification, access a story of interest. However, it was much more common for them to listen to Spotify or other music sources while working due to the necessity to concentrate on the tasks at hand.

During lunch, many would check their smartphones for news, but most spent more time on social media. It appears this is a period of escape and relaxation while getting away from the stress of the workday. Only one respondent actually listened to public radio on their smartphone while eating lunch.

While driving to lunch or on the way home from work, most MRP ethnography respondents listened to music to decompress or to a podcast on their smartphone. There was very little listening to AM/FM radio at the end of the workday.

Many access information in "bite-sized" amounts. We observed several respondents use services like the NPR News Brief and The Skimm at various times of the day in order to catch up with the news of the day. Push messaging is also a preferred way to stay in touch with events, empowering them to access the content they are interested in, while disregarding everything else.

Podcasts are very appealing content options. When visiting their homes, it was clear they live in a media world they often are able to control. Most have Netflix, Hulu, or other services that cost significantly less than cable television but allow them to watch customized television at the time and place of their choosing. Similarly, smartphone apps allow them to listen to podcasts and on-demand audio programs. So, it's not a surprise podcasting represents a sizable opportunity for public radio with these Millennials.

Podcasts – especially those from public radio providers and stations – represent many of the qualities they highly value. These programs provide more than just control over content – respondents appreciate topic coverage in greater depth, presented in a more natural style than what’s typically heard during routine public radio programming. Several also enjoy hearing a more aggressive approach to events and topics, while exposing diverse voices less frequently heard on many on-air radio programs.

Social media is a gateway to news discovery. While most MRP ethnography respondents weren’t observed using social media continuously, it occupies a key part of most of their daily routines. Many use social media as a source for news discovery. Several say they have identified “like-minded” people as trusted sources for important information, along with organizations and brands they deem credible.

On the other hand, there is growing concern about the ways in which social media is used to spread falsehoods and inaccurate information. Many say they have run searches on stories from an unknown source in order to verify them prior to clicking a link, reading it, sharing it with others, or believing it.

Despite these concerns, social media – especially Facebook – remains a primary source of news discovery.

Public radio stations that make local connections are valued. In each market visited, the news/talk program produced by the local station was mentioned for providing important information, including politics and issues that affect them close to home. These programs are appreciated for their insight into local issues and their dedication to following major local stories over time, such as the HB2 story in Charlotte or the Flint Water Crisis in Michigan.

While everyone follows national and international news, there’s a sense this information is available from a large number of sources. It’s often the local content that stands out, largely because of public radio’s edge over local television stations and newspapers, often regarded as in decline and/or focused on more salacious “if it bleeds, it leads” news coverage, rather than focusing on important issues affecting the community.

Some suggest their local public radio station could provide more information about local events and businesses, ranging from concerts, the arts, and restaurants. There is also a desire to engage more directly with their local public radio station at events, providing more listener interactivity.

Attitudes about diversity in public radio are diverse. There are split opinions about whether public radio is doing an adequate job of providing a wide range of opinions and voices with its programming. In general, Caucasians tend to be satisfied with what’s being aired, and feel public radio provides them with diverse perspectives. Several

define diversity on a more surface level, often giving public radio credit for featuring female and gay hosts, while covering topics like Somalia.

Other Caucasians, however, feel public radio could do better in its diversity efforts. And several of our African-American and Latino respondents contend public radio falls short. While better than other media, there is a sense that people of color are missing from the “power” positions on public radio programs. As a result, their voices aren’t being heard often enough. There are also complaints of too few hosts who represent their own points-of-view, based on the lack of alternative topics, and the omission of questions they’d like to hear guests address.

As a result, a few say they’re gravitating away from public radio, filling the gap with podcasts that feature people of color. There are even complaints that public radio podcasts targeting African-Americans and Latinos are geared toward their Caucasian audience and aren’t authentic enough. As a result, some are adding non-Public radio podcasts to their menu.

They say they aren’t abandoning public radio because they affirm its overall importance. But for some, public radio needs to be more diverse in order to satisfy their needs.

They are willing to pay for what they consume. Four of the 12 ethnographic respondents are currently members of their local public radio stations. Several of the others say they would like to be members, but their current economic situation is prohibitive at this time. The concept of paying for content they value, however, is well-accepted.

Sustaining membership is by far the most appealing approach to membership. Paying in small, monthly increments fits their lifestyle and a few equate it to Netflix or other parallel financial arrangements they have. It also works because of its simplicity.