

# Public Radio's Pathway Through the Pandemic

JACOBS MEDIA  
**COVID-19**  
**SURVEY 2**

**Jacobs**  
media strategies

**PRPD** 

**Public Radio**  
May 2020

# Methodology

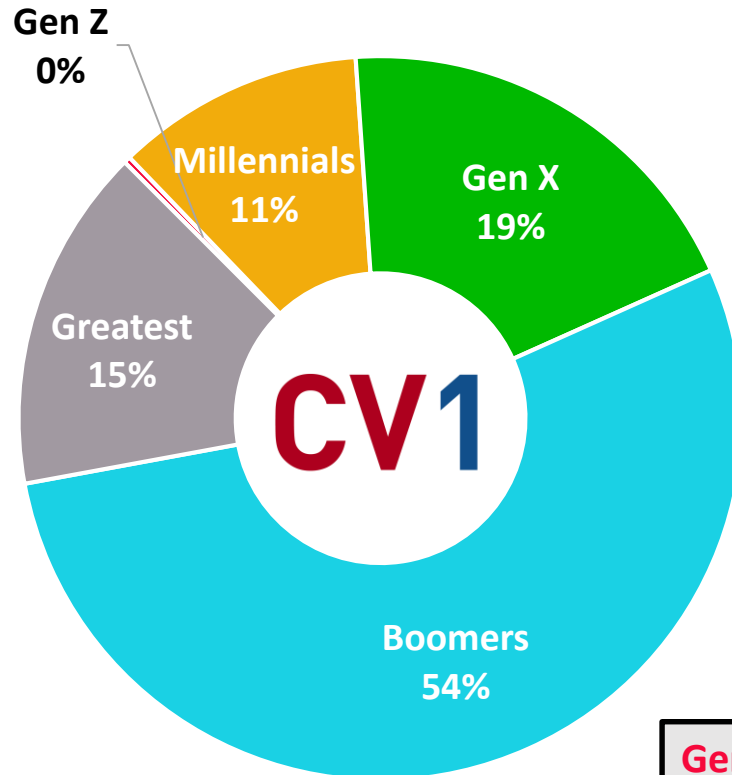
- 47 public radio stations in the United States
  - Separate Commercial Radio and Christian Music Radio surveys also fielded concurrently
- N = 15,345
- Interview dates: May 12 – May 14, 2020 – a “snapshot” of this point in time
  - Follow-up to CV1 public radio survey conducted March 31 – April 2, 2020
- News/Talk 27, Classical 10, AAA 7, Other/Jazz 3
- Most respondents are members of radio station databases. This is a web survey and does not represent all public radio listeners or even each station’s audience.



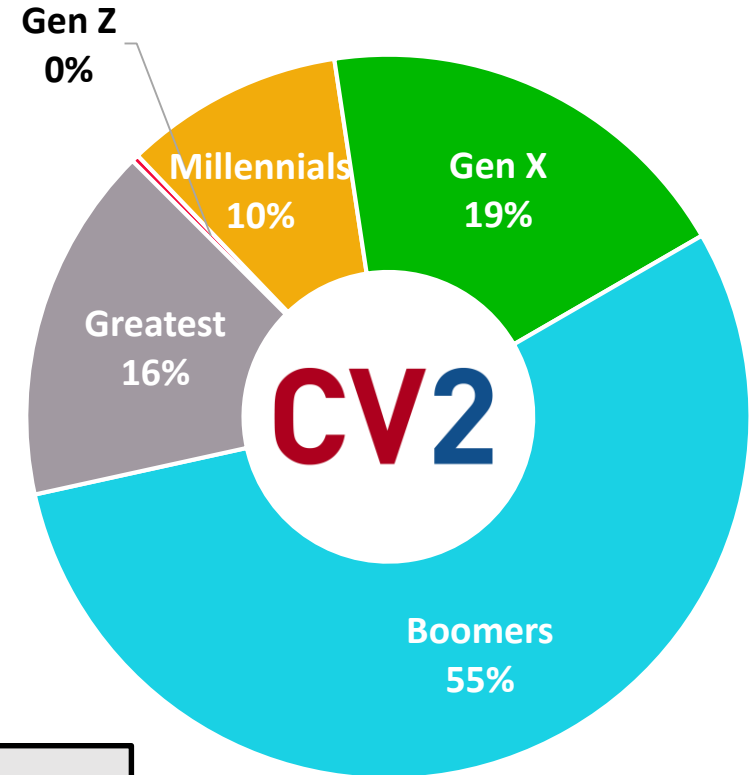
# Who They Are

# Who Participated? Generations

April 2020



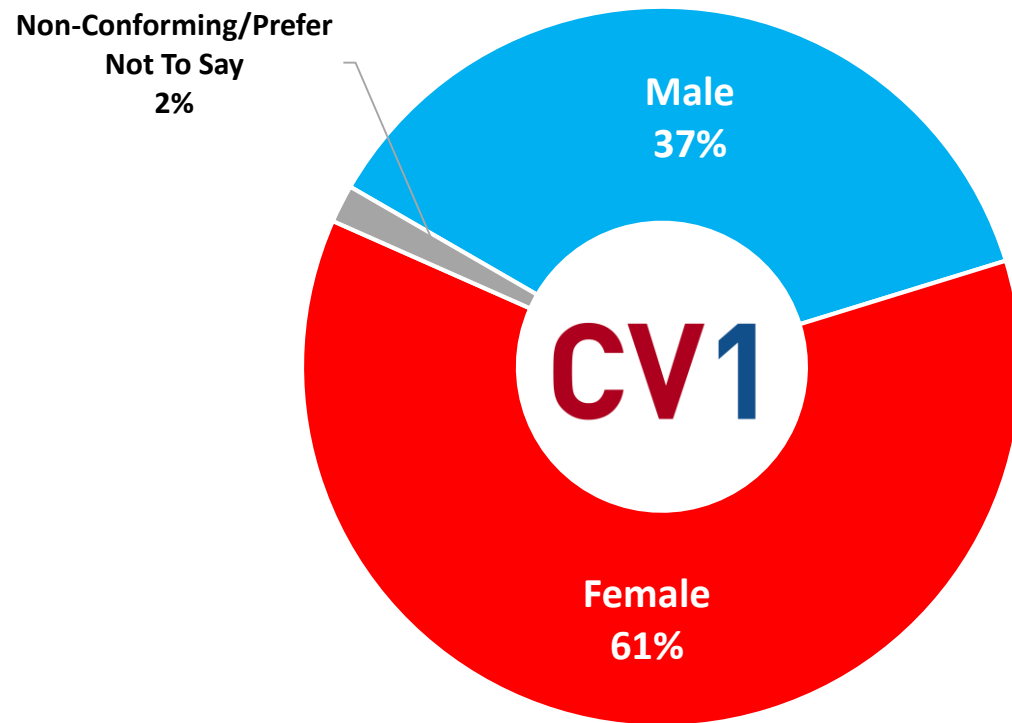
May 2020



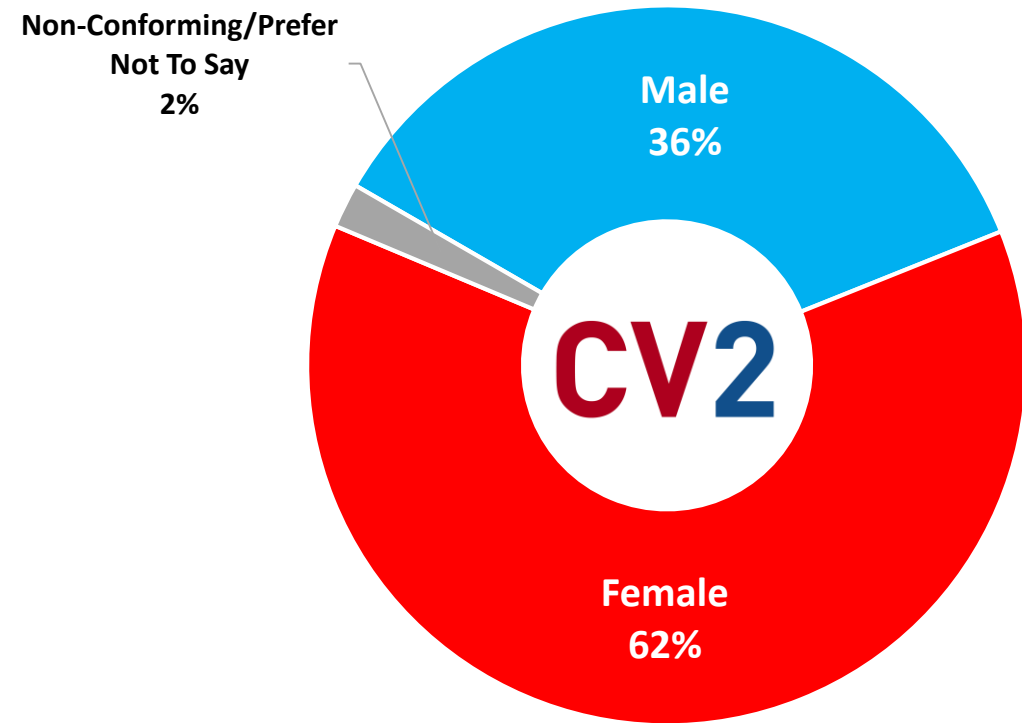
**Gen Z (born after 1996)**  
**Millennials (born between 1981-1996)**  
**Gen X (born between 1965-1980)**  
**Baby Boomer (born between 1946-64)**  
**Greatest Generation (born before 1946)**

# Who Participated? Gender

April 2020

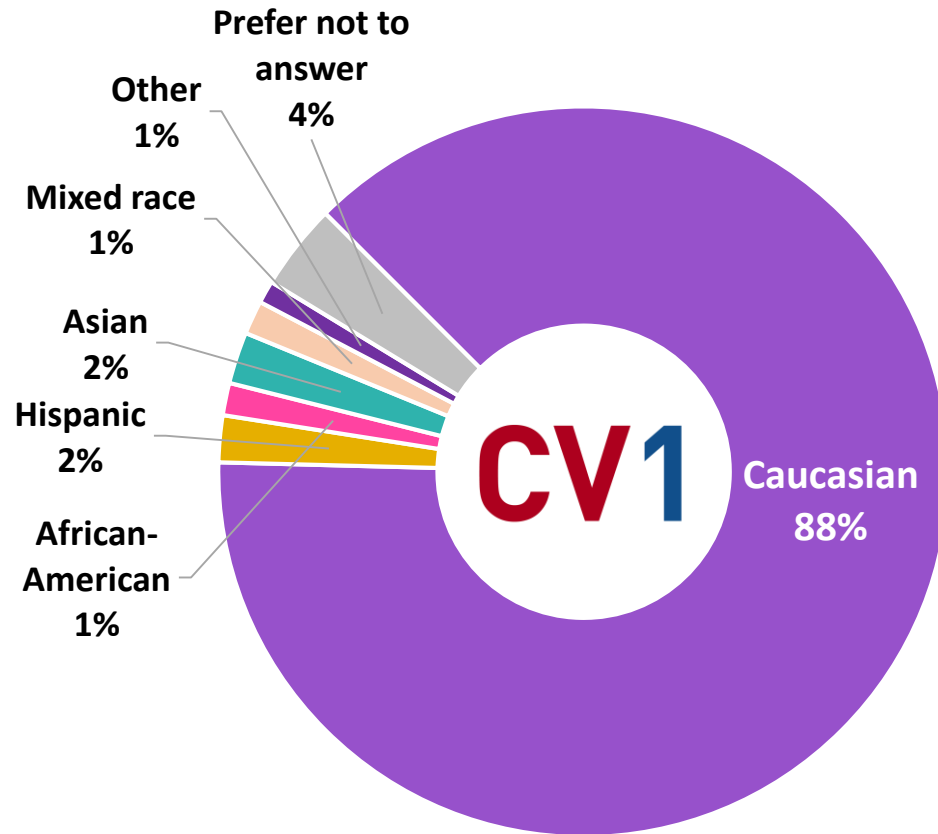


May 2020

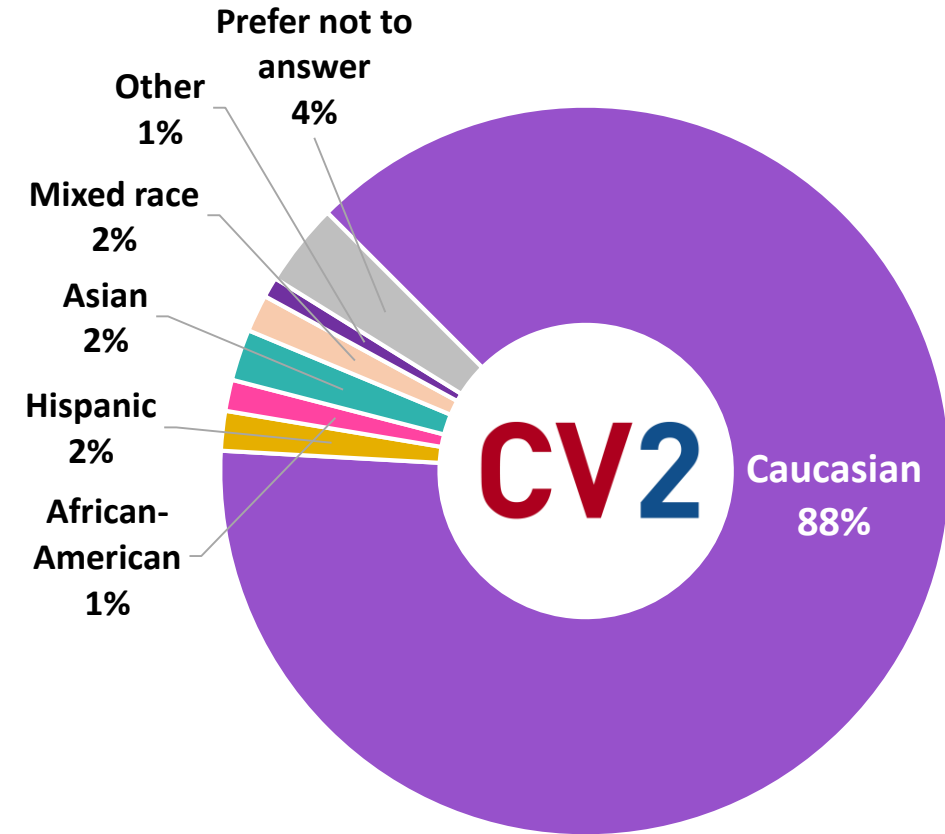


# Who Participated? Ethnicity

April 2020

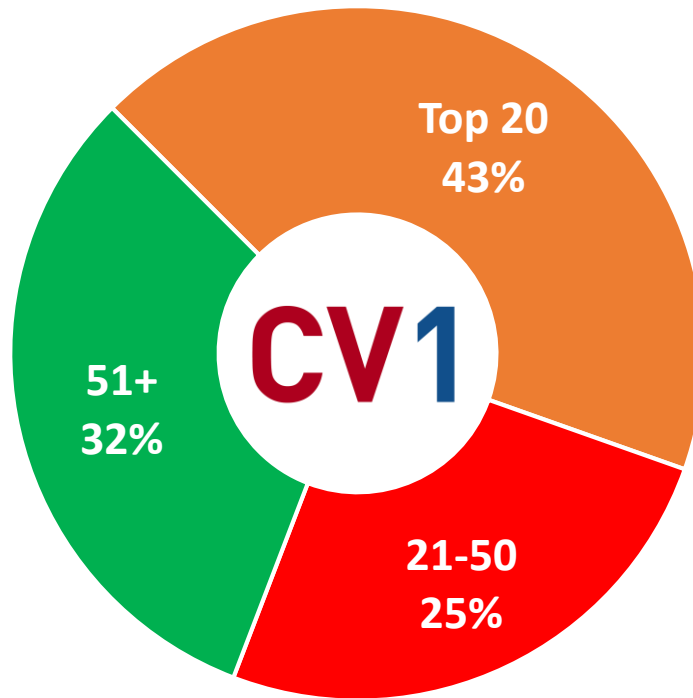


May 2020

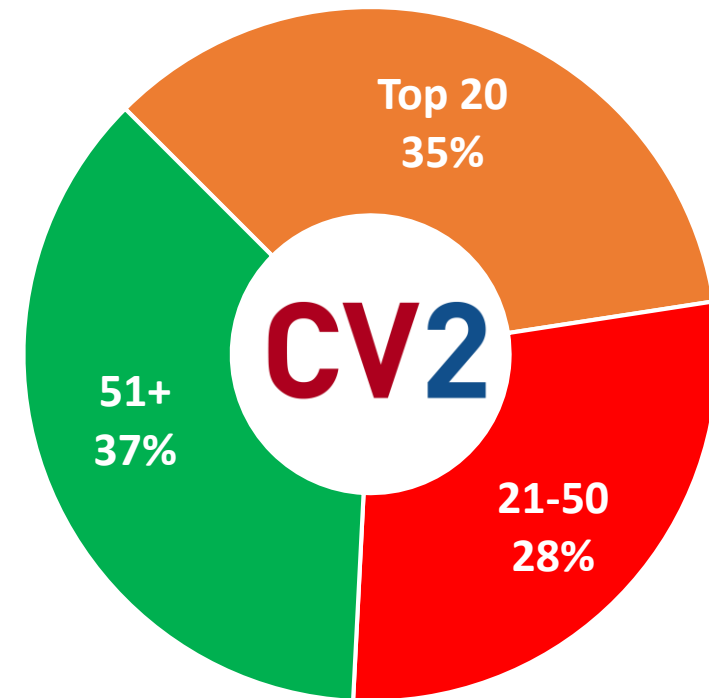


# Where Do Respondents Live? Market Size

April 2020

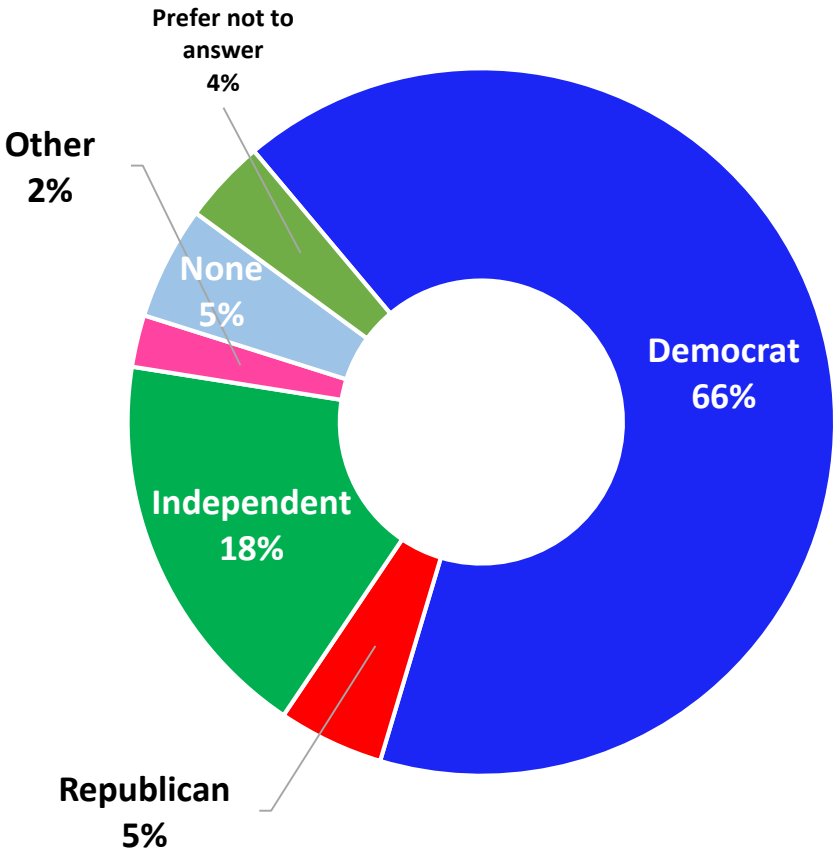


May 2020

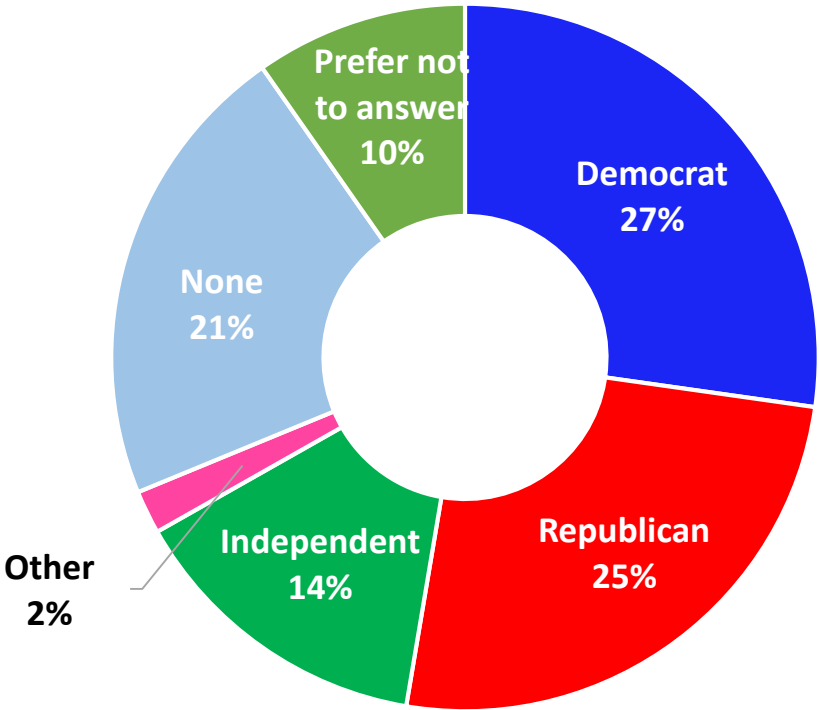


# Who Participated? Political Party Preference

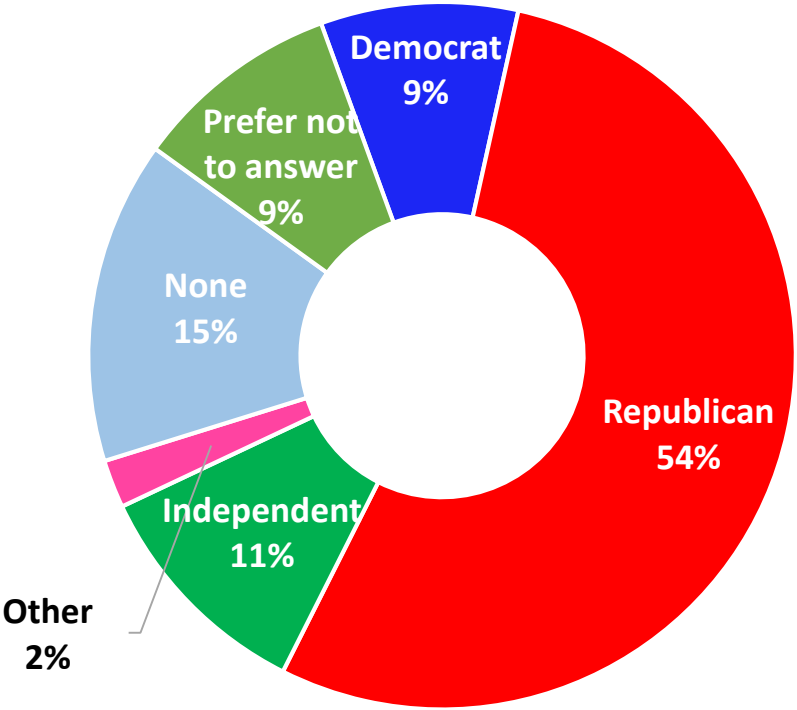
Public Radio



Commercial Radio



Christian Music Radio



Among U.S. respondents



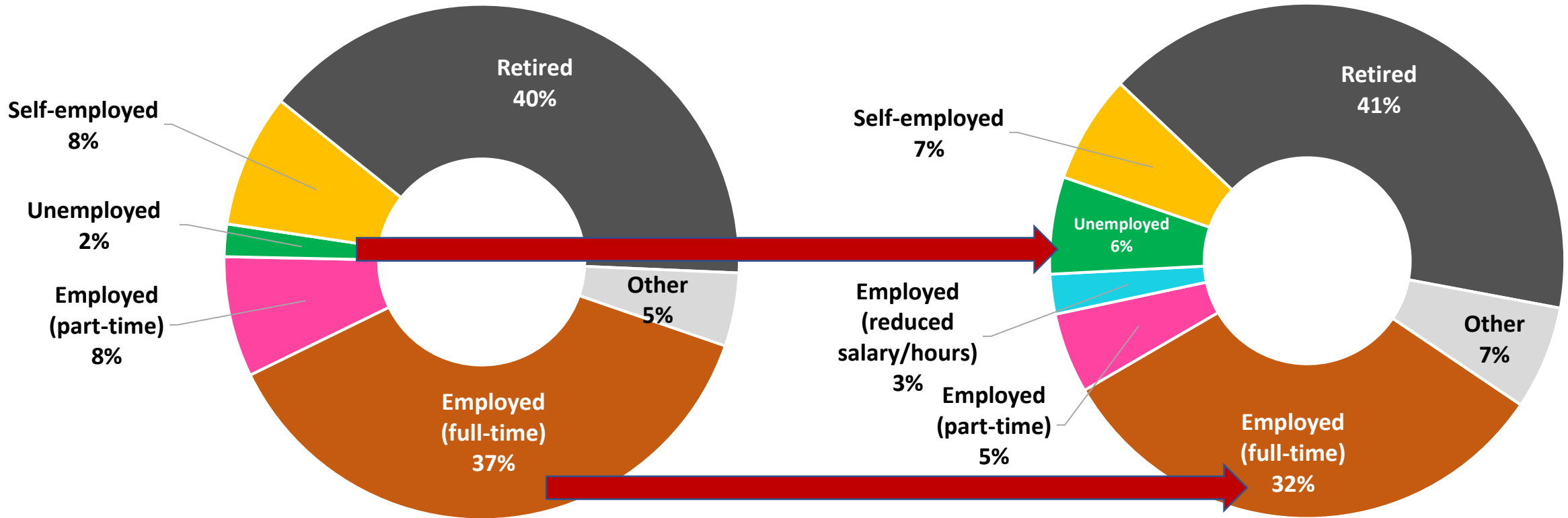


# Where They Are

# Consistent With U.S. Reports, Many Have Lost Their Jobs Since COVID-19 Began, But Many Were Retired To Begin With

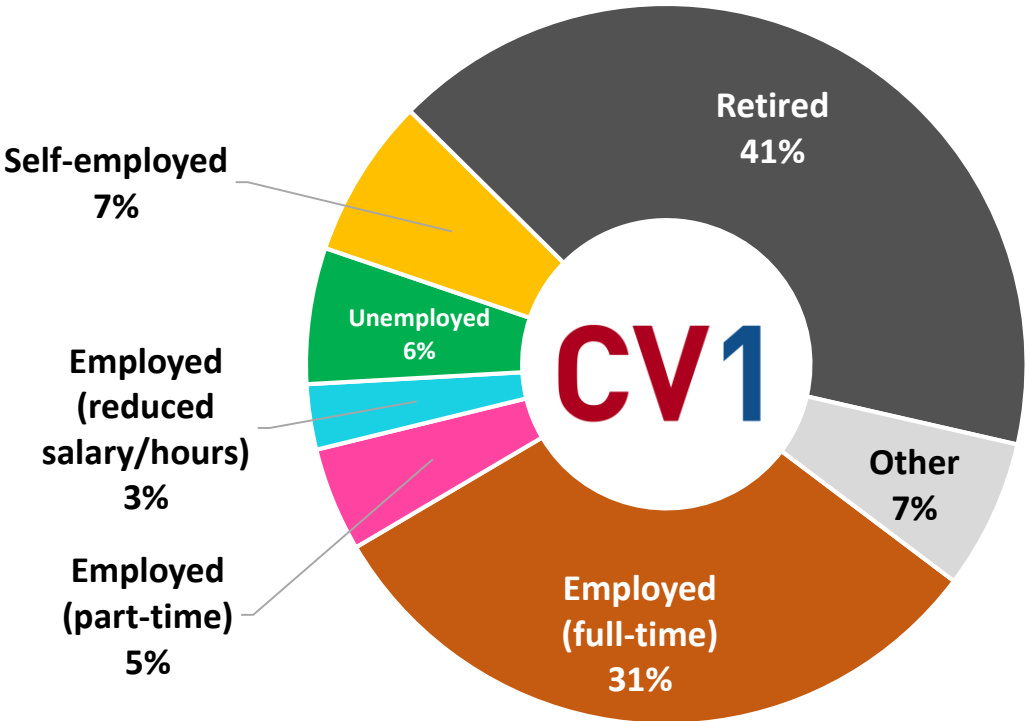
BEFORE Coronavirus Outbreak

Current Employment Status

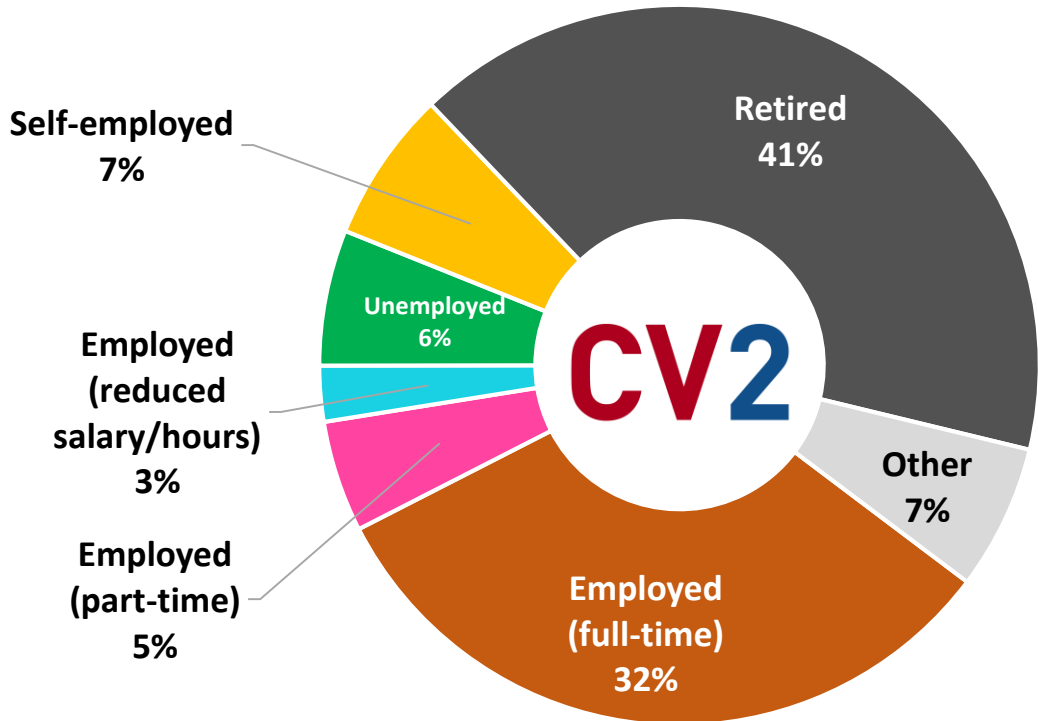


# The Most Severe Job Losses Occurred Weeks Ago

April 2020



May 2020



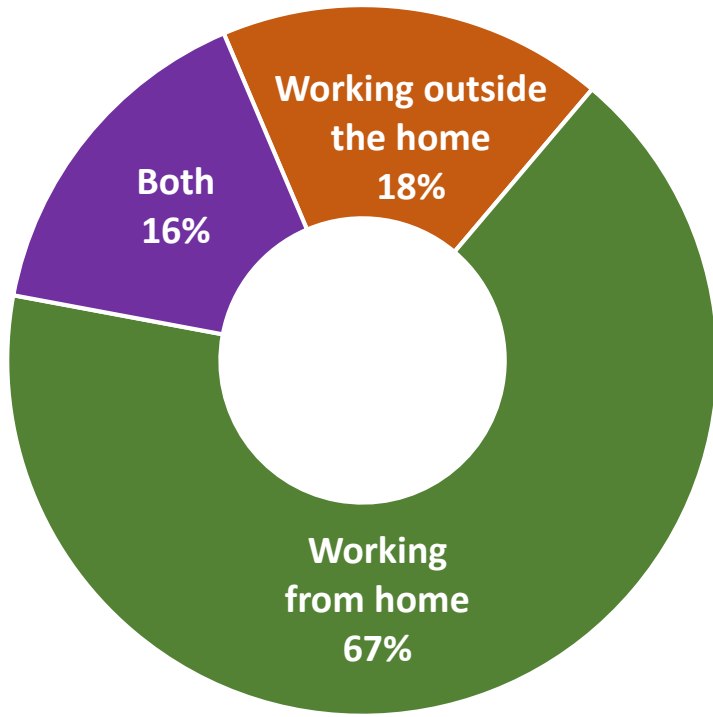


# WFH

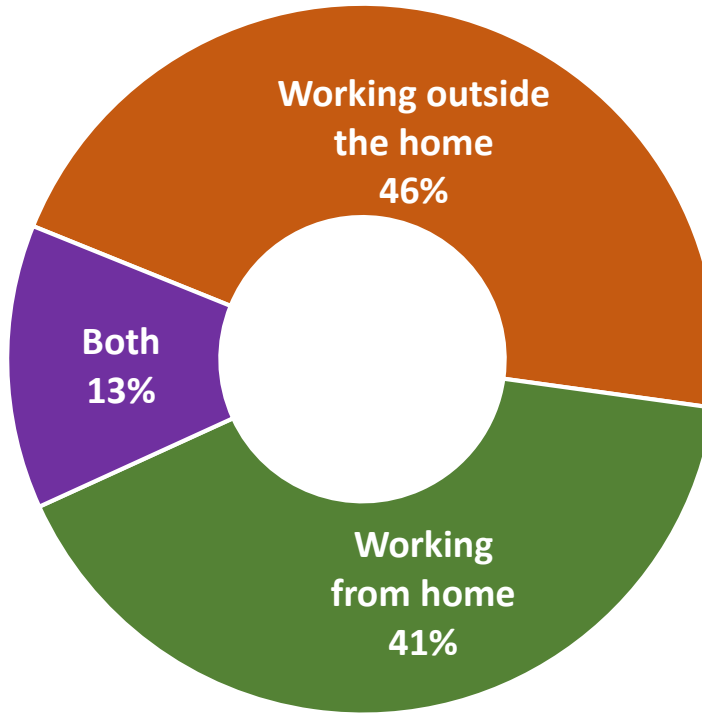


# Among Employed Public Radio Listeners, Most Are Working From Home

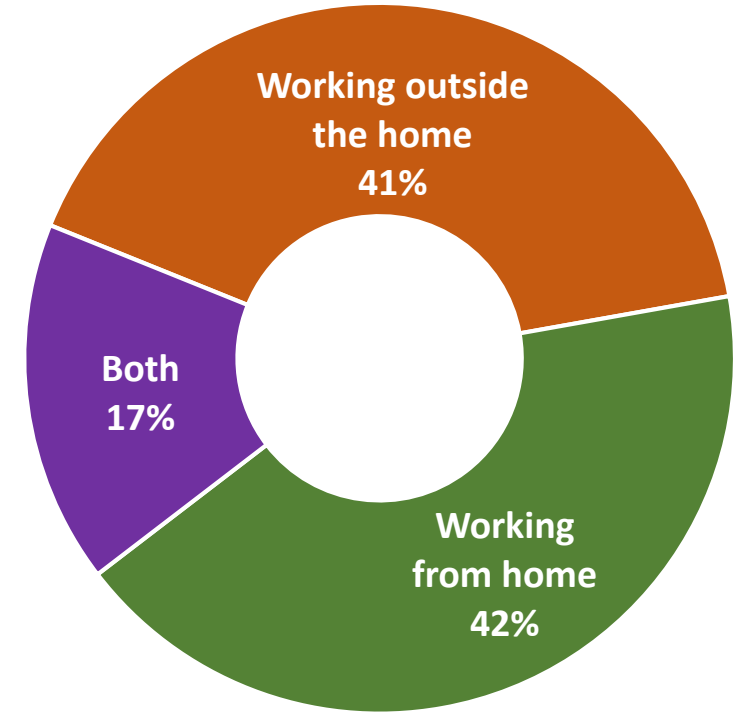
Public Radio



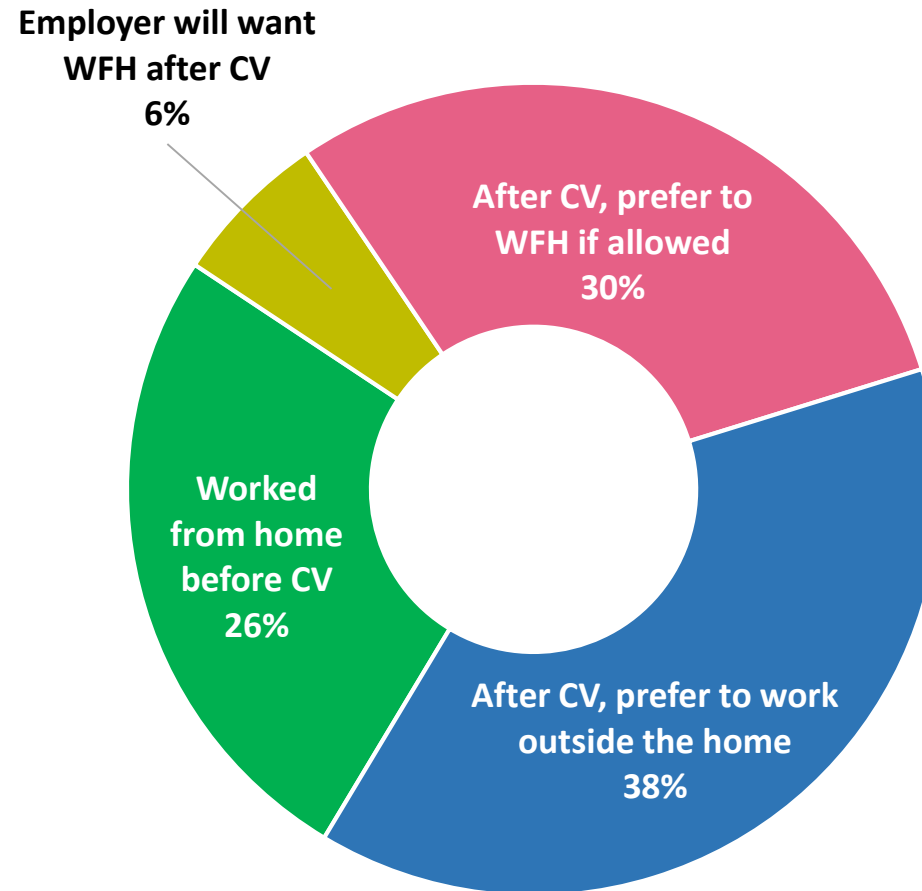
Commercial Radio



Christian Music Radio



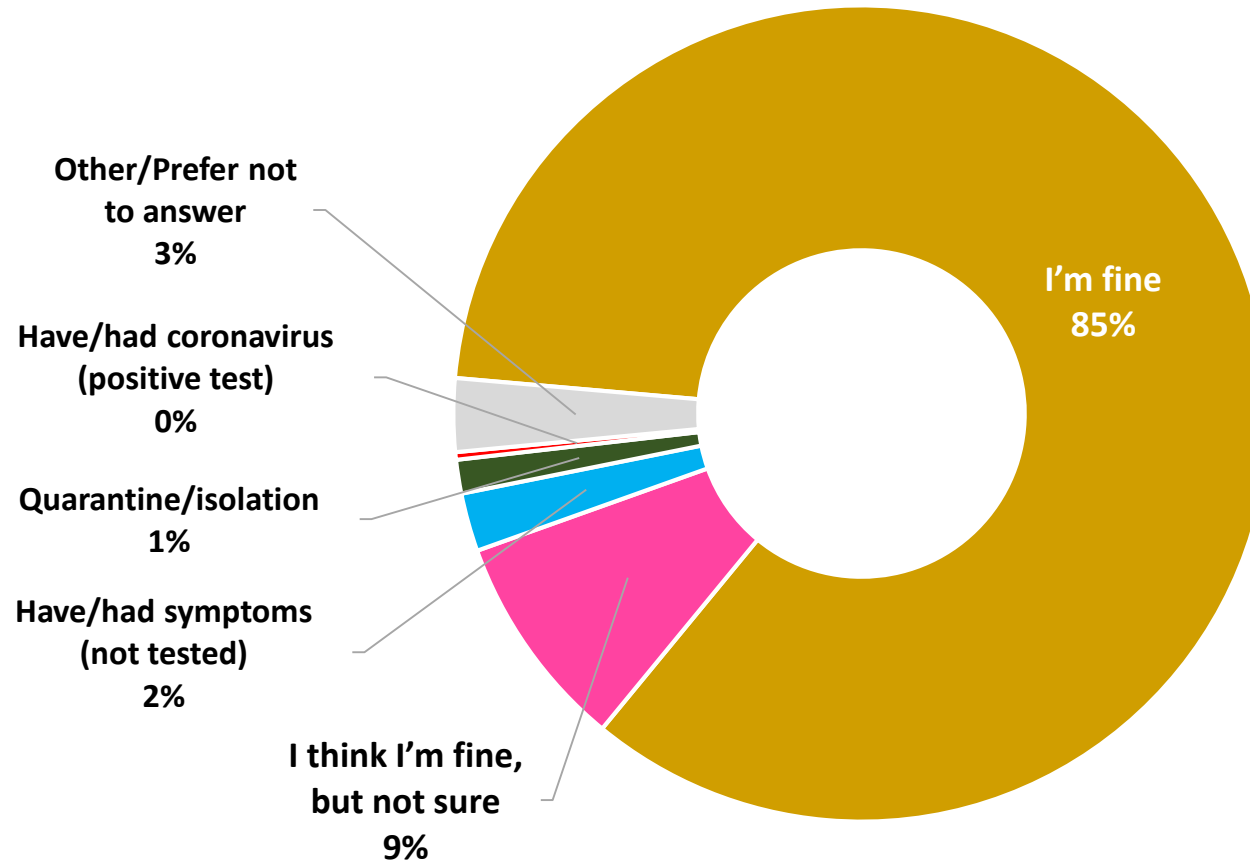
# Among Those Employed/Working From Home, Many Will Likely WFH Post-COVID-19





# The Public Radio Audience's Mindset

# Most Are Feeling Good, But More Than One in Ten Has Had a Positive Test, Symptoms, or Just Aren't So Sure

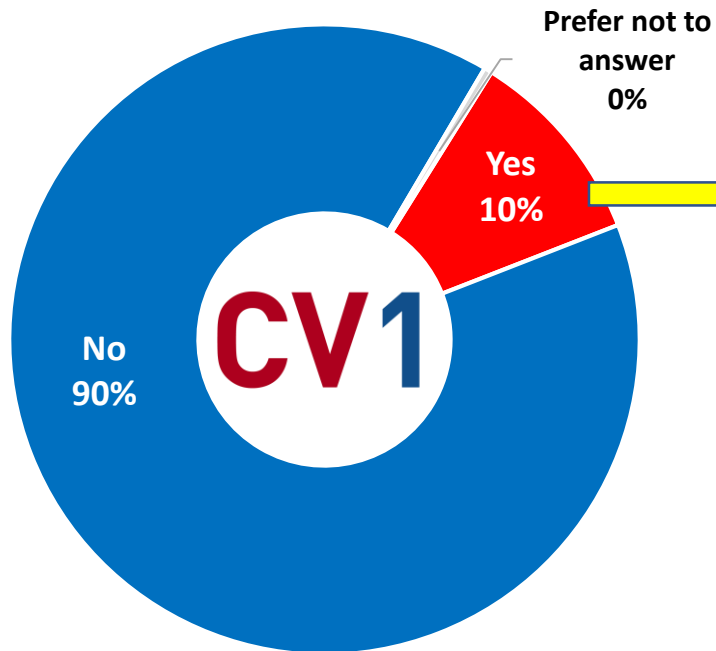


*"What is your current state of health?"*



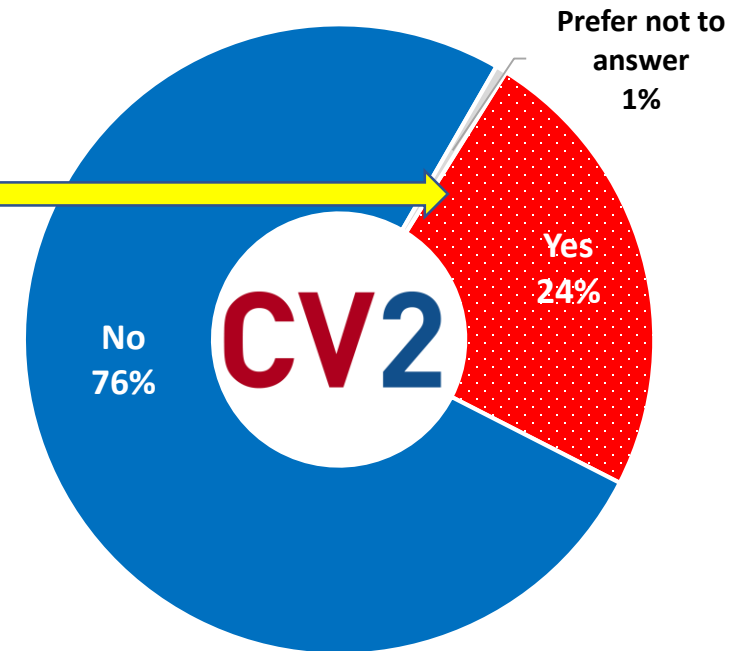
# About One in Four Knows Someone Who's Tested Positive or Likely Had COVID-19 – More Than 2X As Much As 6 Weeks Ago

April 2020



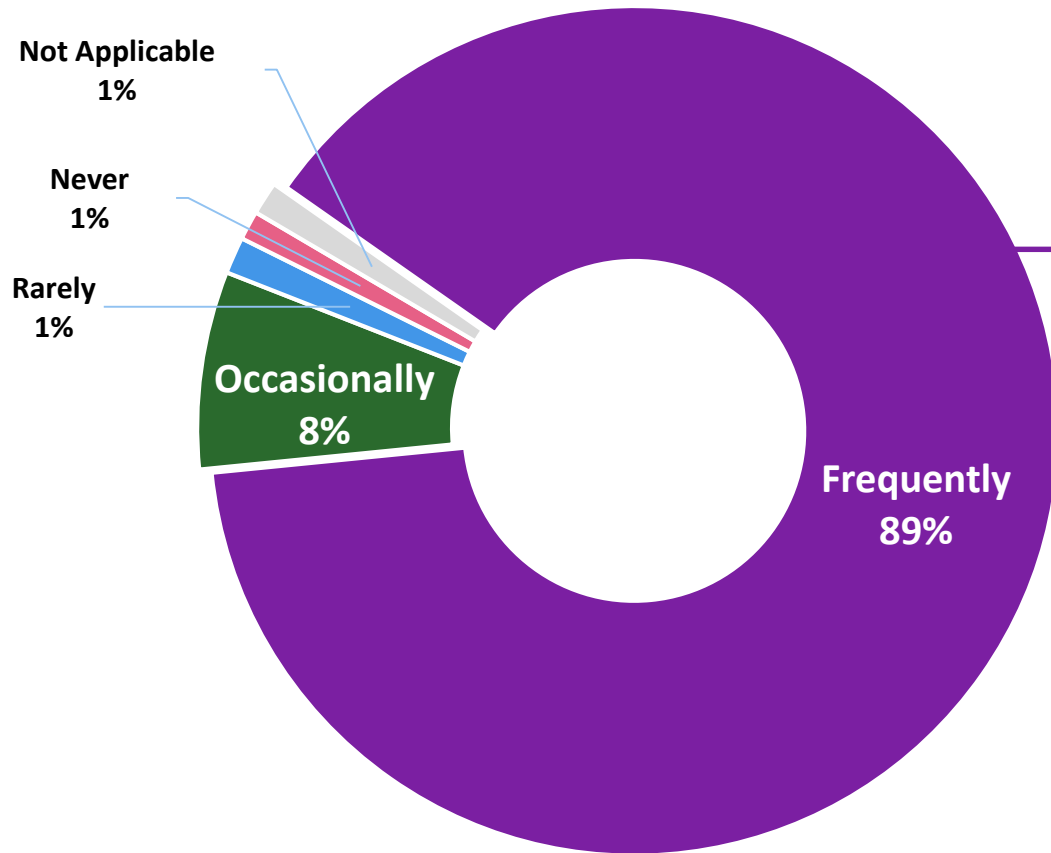
*"Do you have any family members, friends or co-workers who have tested positive for coronavirus?"*

May 2020

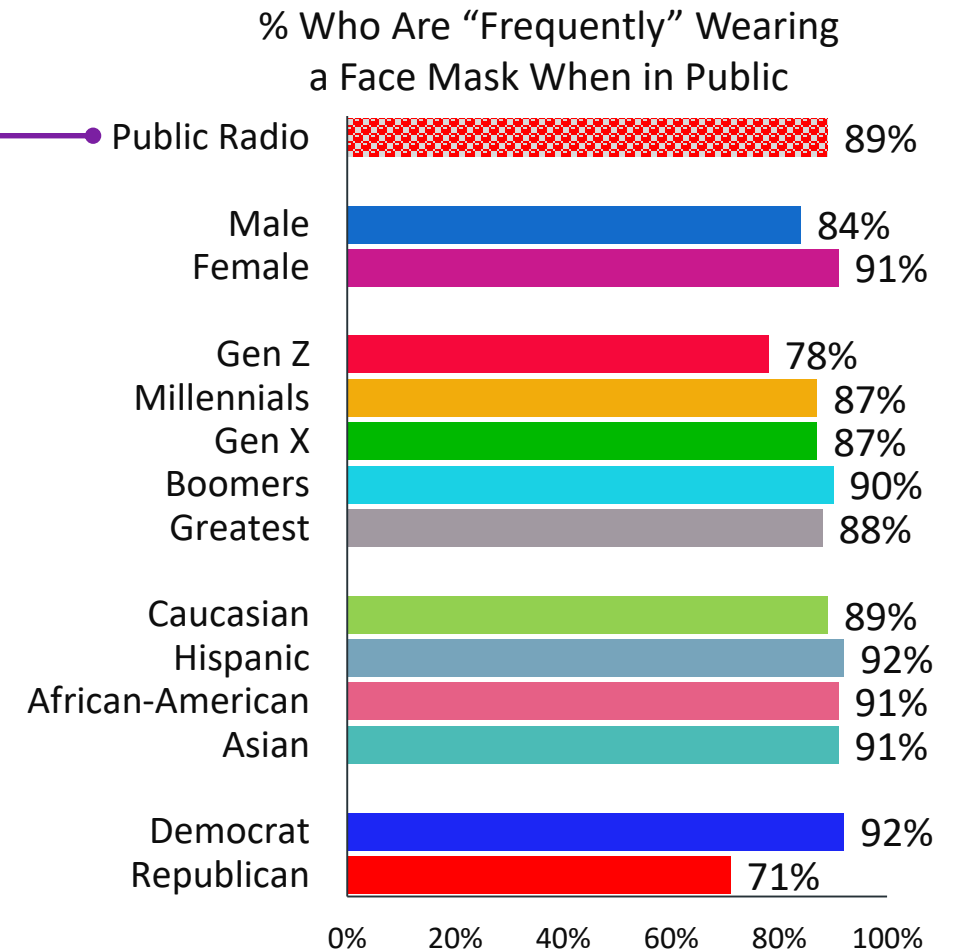


*"Do you have any family members, friends or co-workers who have tested positive for coronavirus or are likely to have had coronavirus even though they were not tested?"*

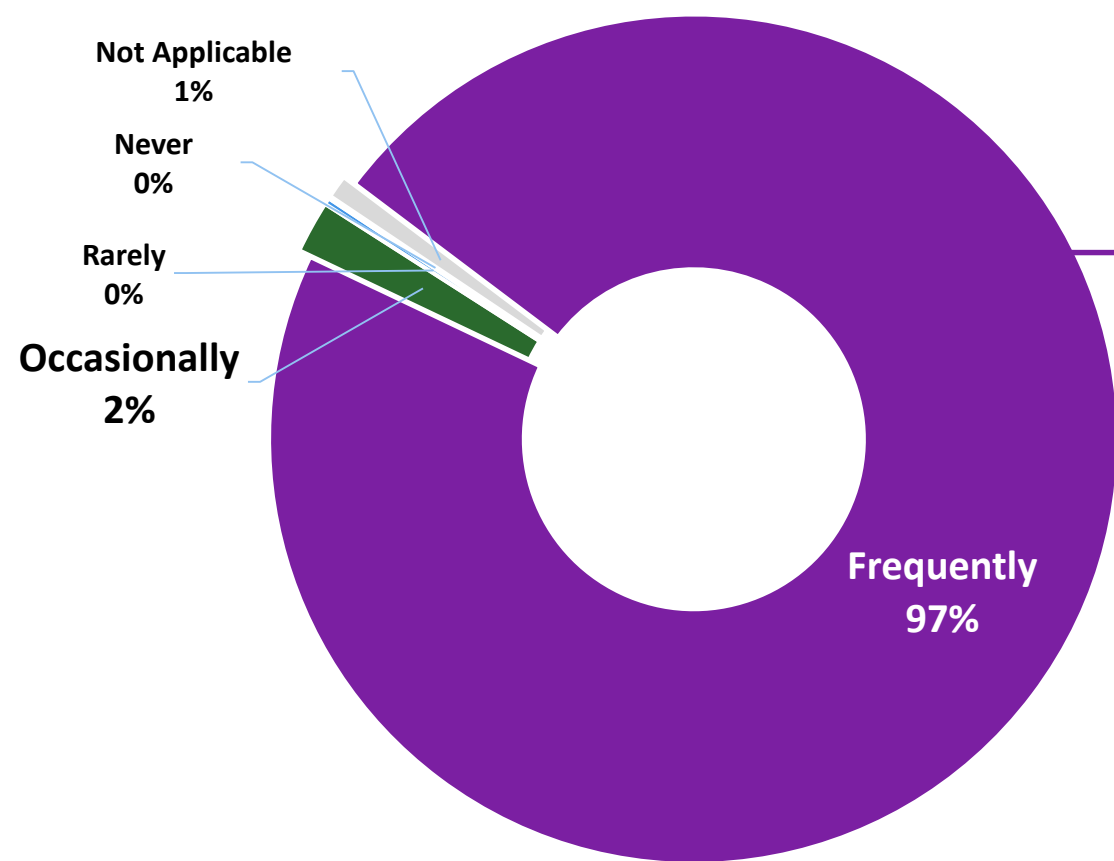
# Most Say They Frequently Wear a Face Mask When in Public



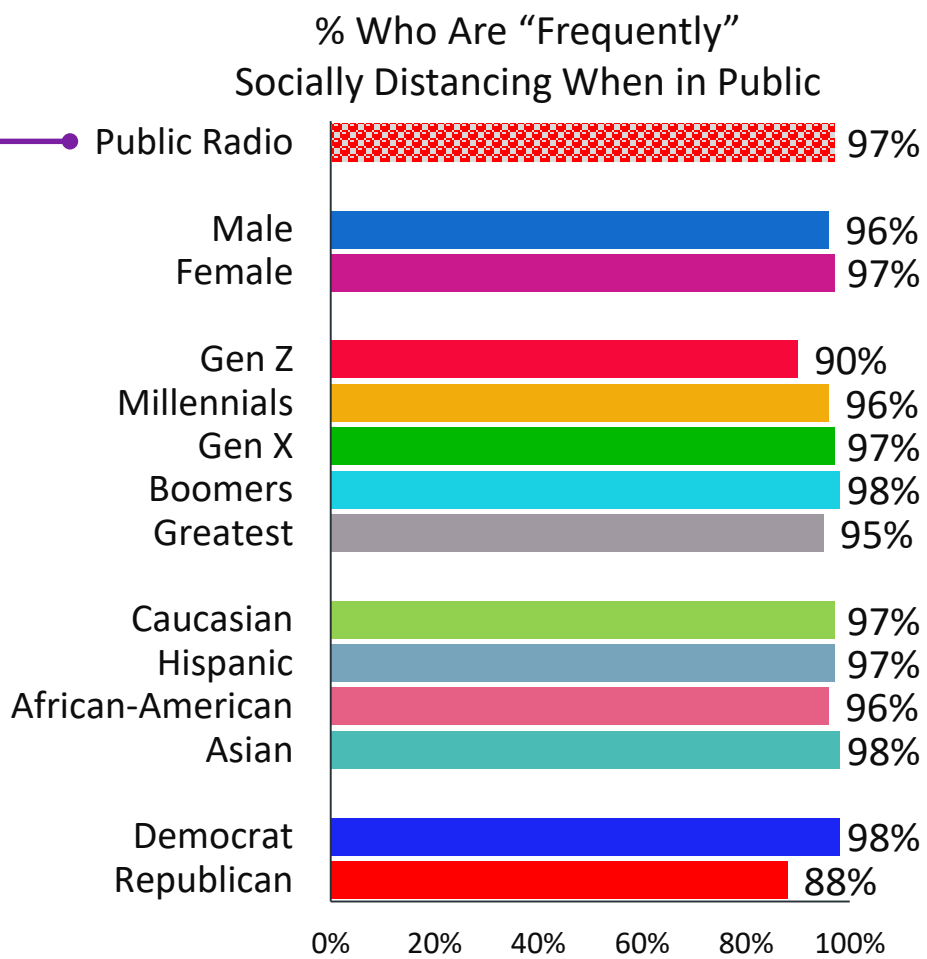
*"At this time, how often are you personally wearing a face mask when in public?"*



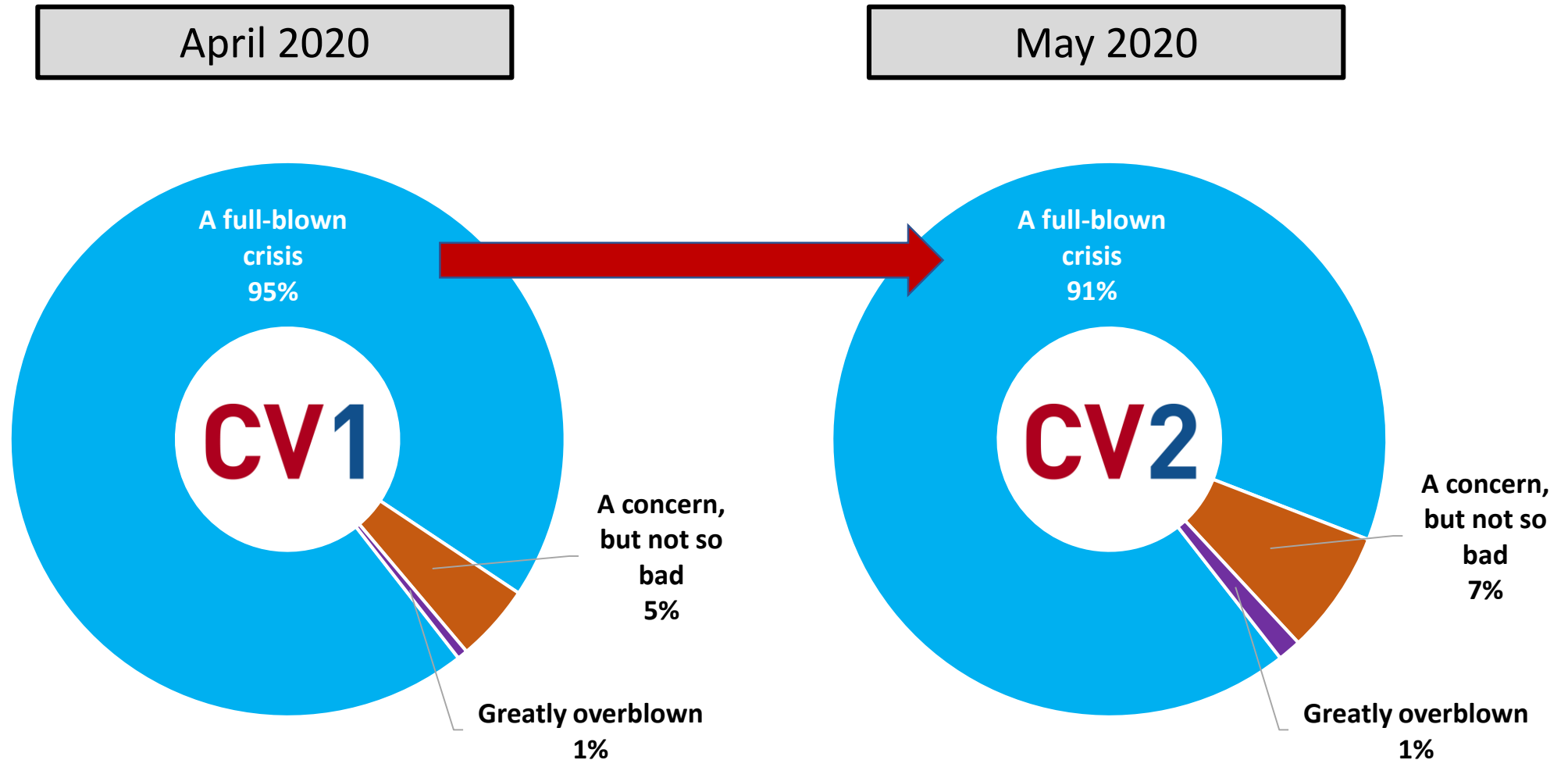
# Nearly All Are Frequently Socially Distancing When in Public



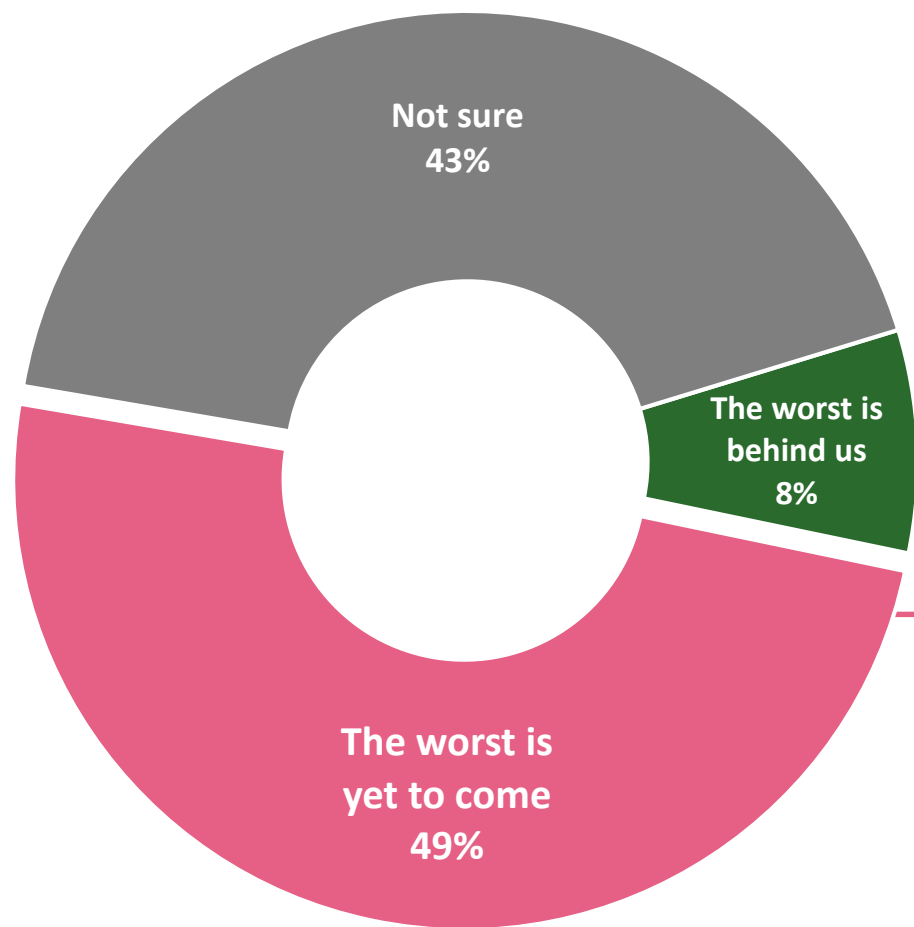
*“At this time, how often are you personally maintaining social distancing guidelines when in public?”*



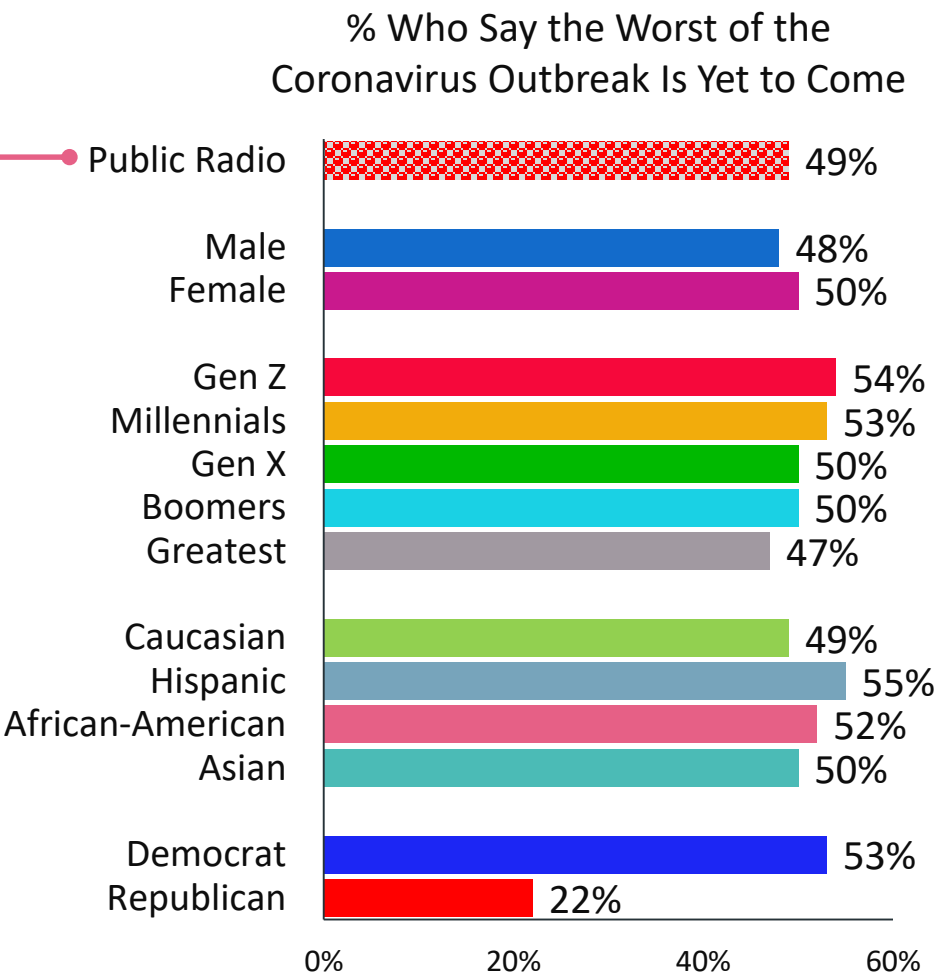
# The Coronavirus Outbreak Is Still Seen as a Full-Blown Crisis



# Half Say the Worst of the Coronavirus Outbreak Is Yet to Come



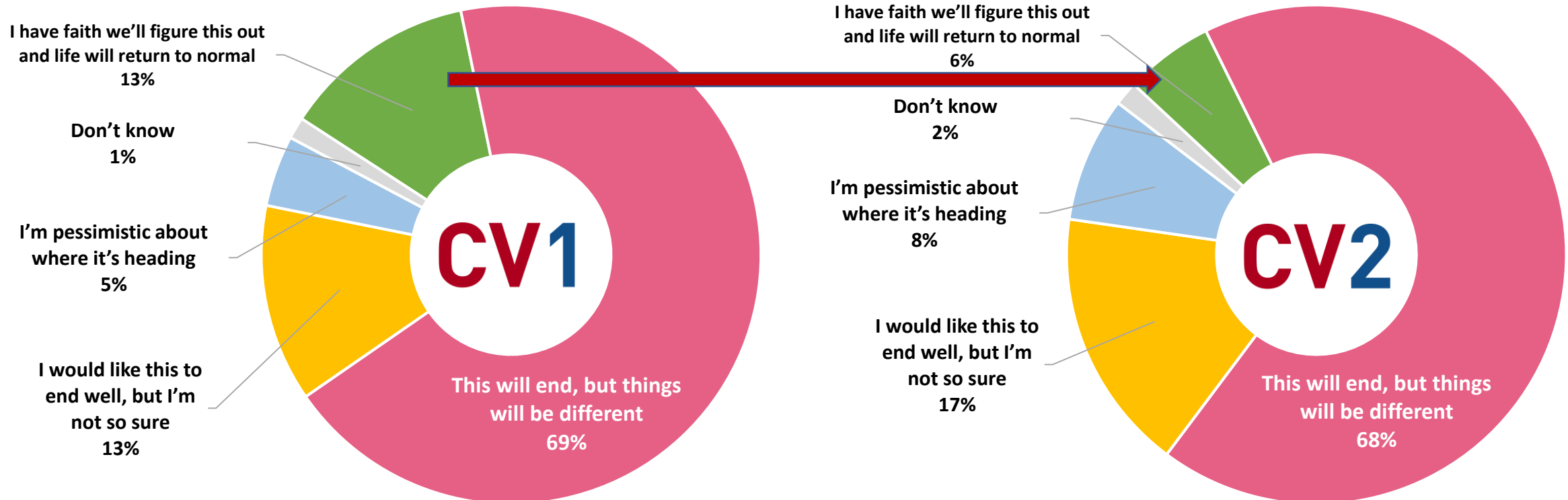
*“Which of the following best describes how you feel about the coronavirus outbreak?”*



# A Majority Still Say Things Will Be “Different” When the COVID-19 Crisis Ends, While Fewer See a Return to “Normal”

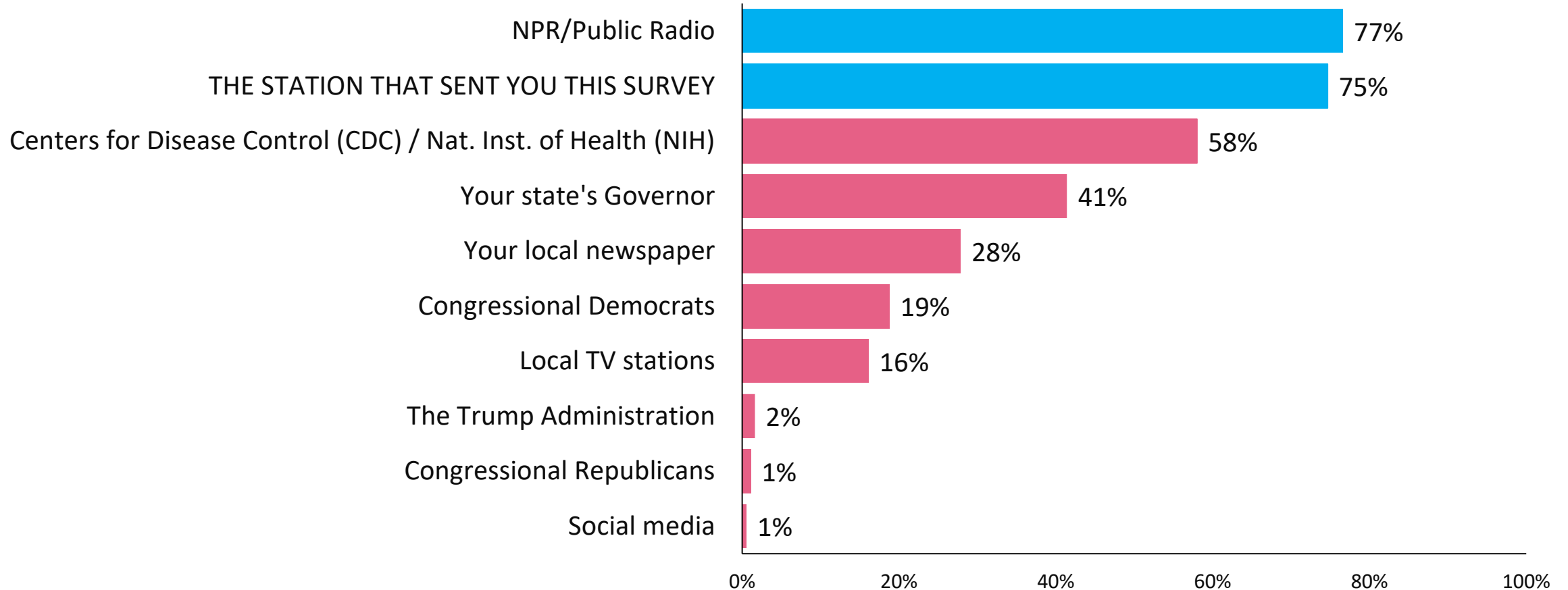
April 2020

May 2020

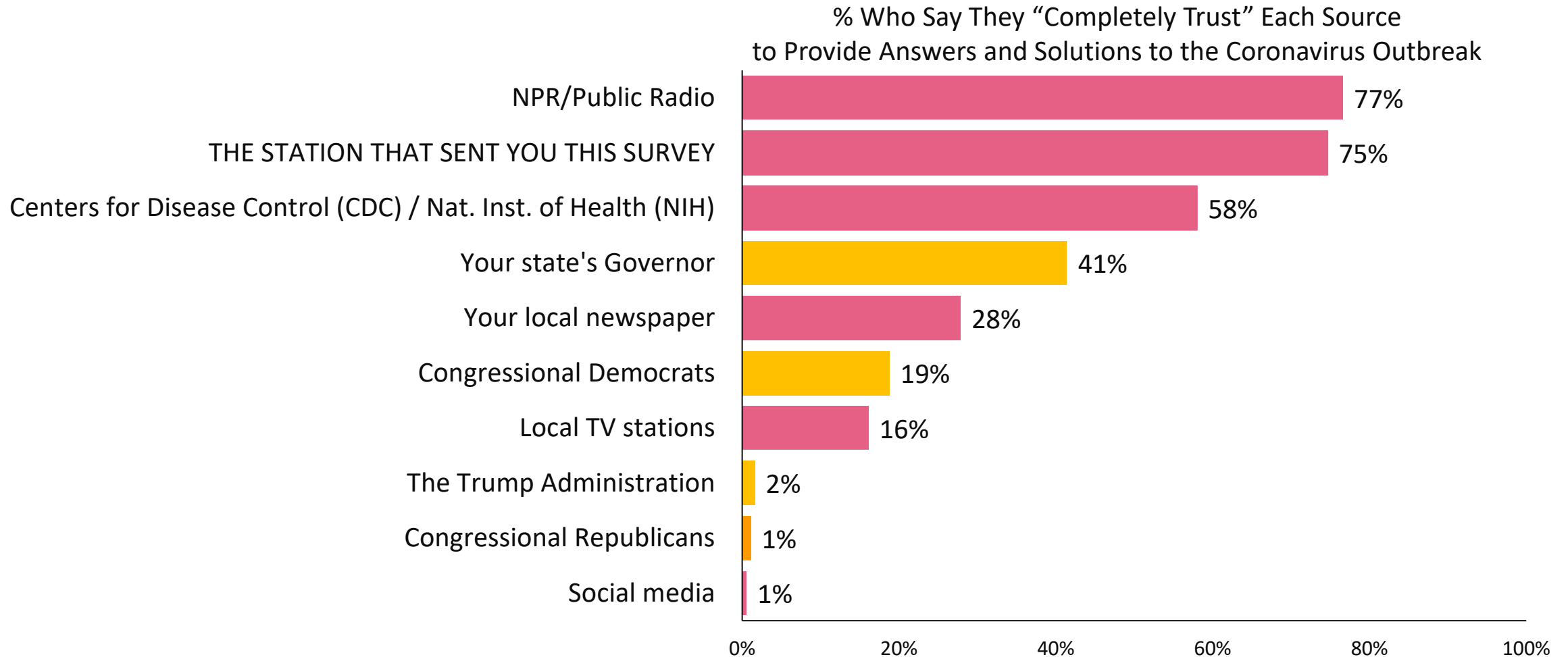


# Similar to CV1, the Most Trust Goes to NPR, Listeners' Home Stations, Followed By the CDC/NIH

% Who Say They "Completely Trust" Each Source  
to Provide Answers and Solutions to the Coronavirus Outbreak



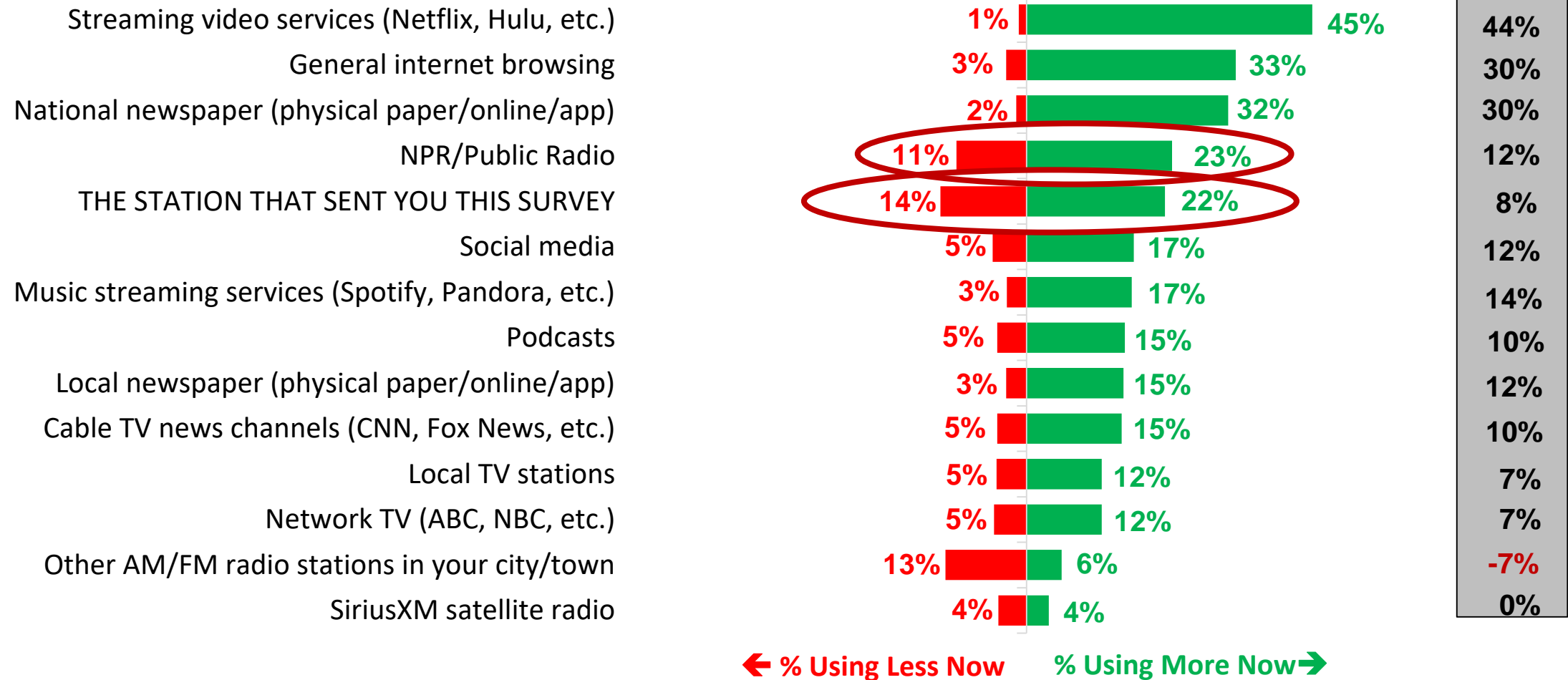
# Among Political Officials, State Governors Are Most Trusted



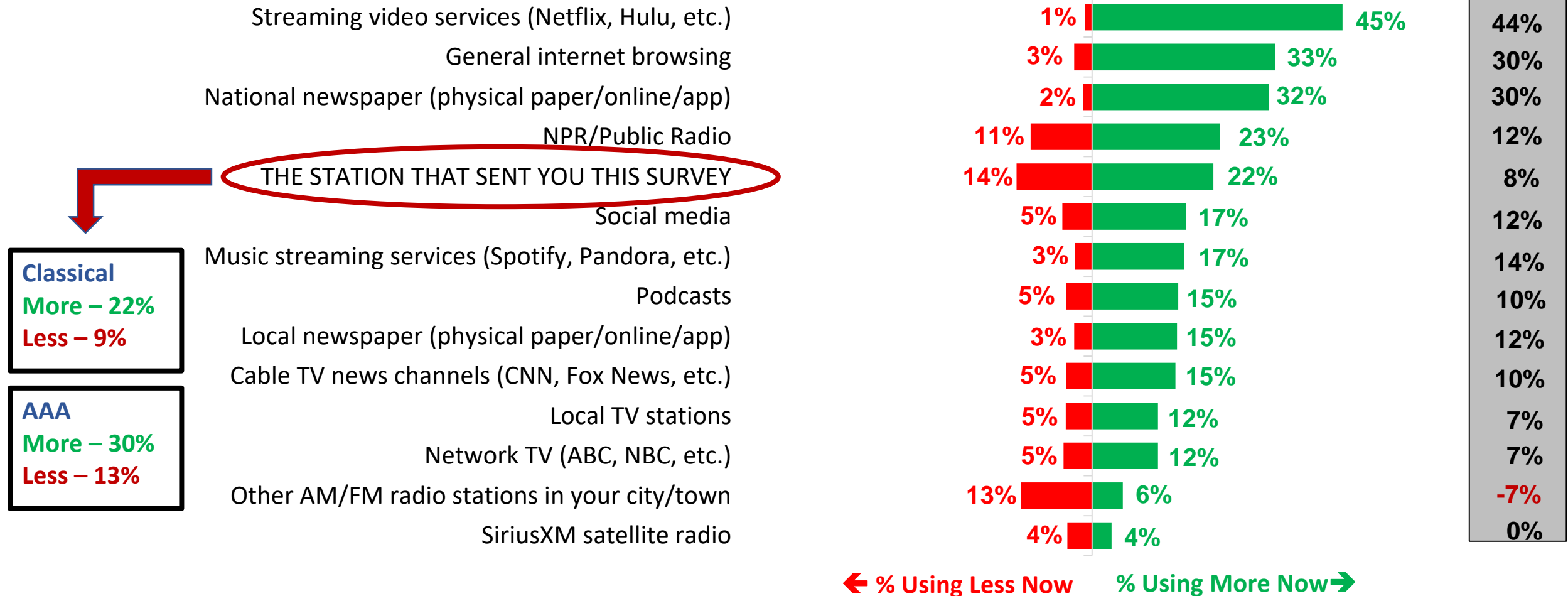




# Since COVID-19, Home Station Listening Is Solid; Streaming Video, Web Browsing and Newspapers Are All Strong

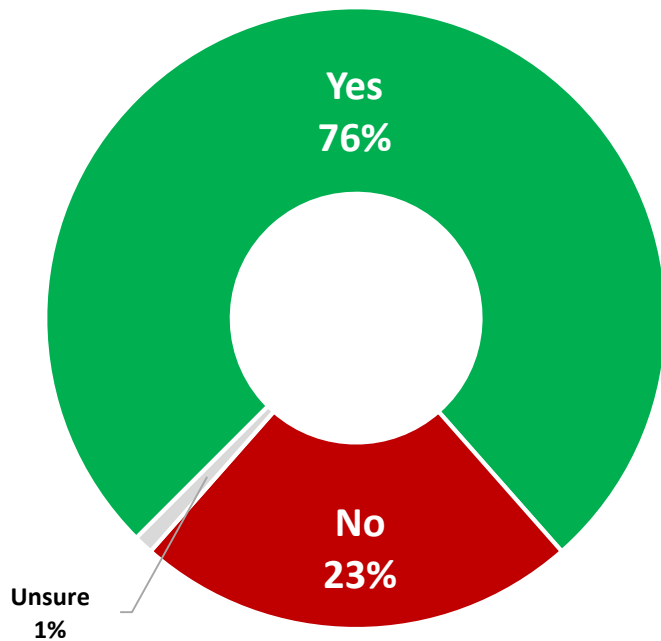


# Of the Public Radio Formats, Classical and AAA Appear To Be Getting Impressive “Lift” From the COVID-19 Crisis

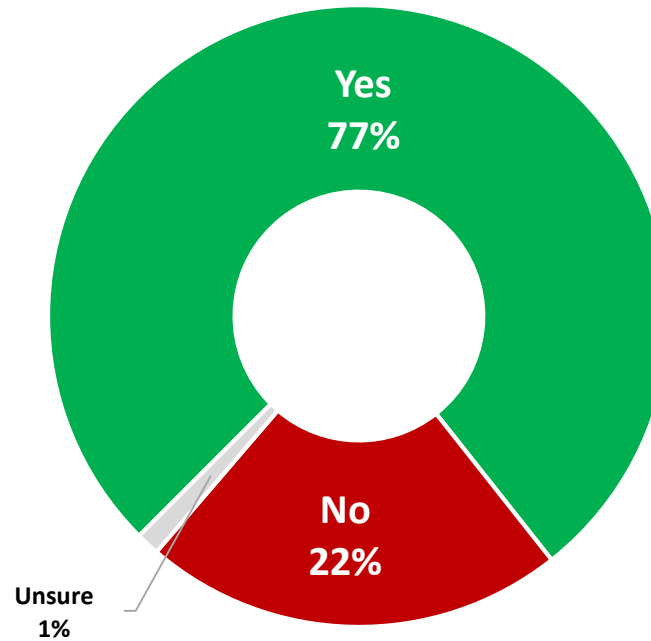


# More Than One-Fifth Do NOT Have a Working Radio in Their Homes That They Use

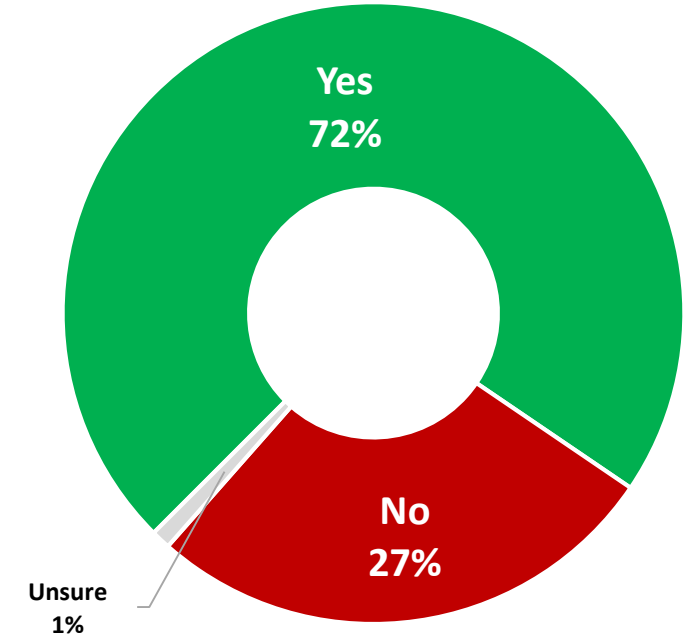
Public Radio



Commercial Radio



Christian Music Radio

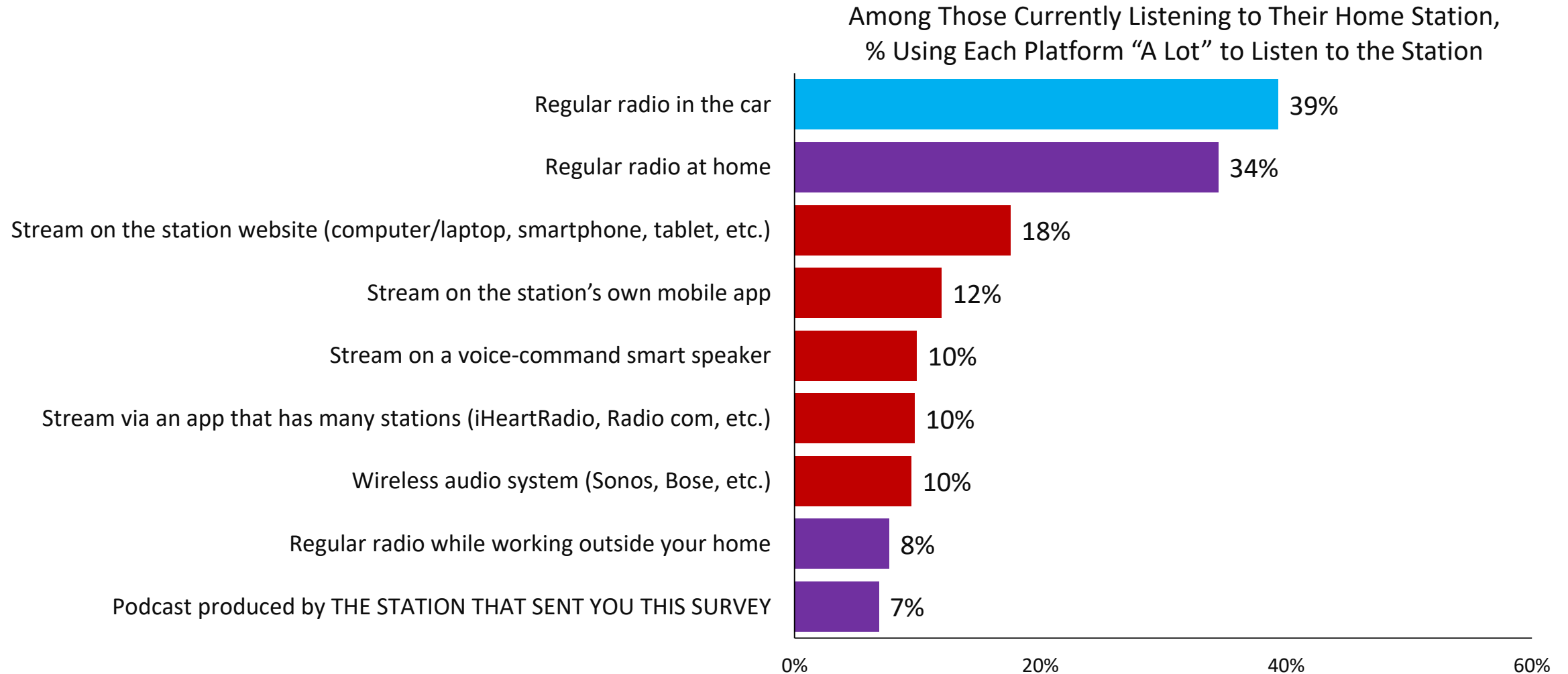


*"In your home, do you have a working radio that you use?"*



# Public Radio Listening & the Coronavirus

# In-Car Listening Leads (Just Like “Normal”) While Streaming on Various Devices Looks Solid





# Seven in Ten Rate Their Home Station “Excellent” Since the Coronavirus Outbreak

Don't know/haven't listened

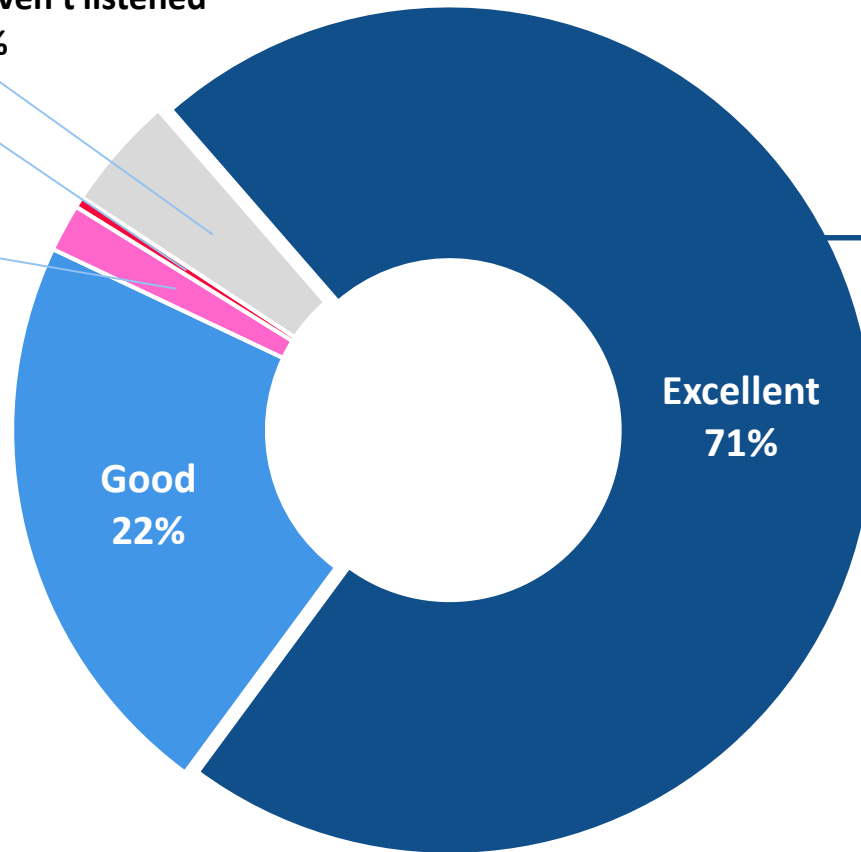
4%

Poor

0%

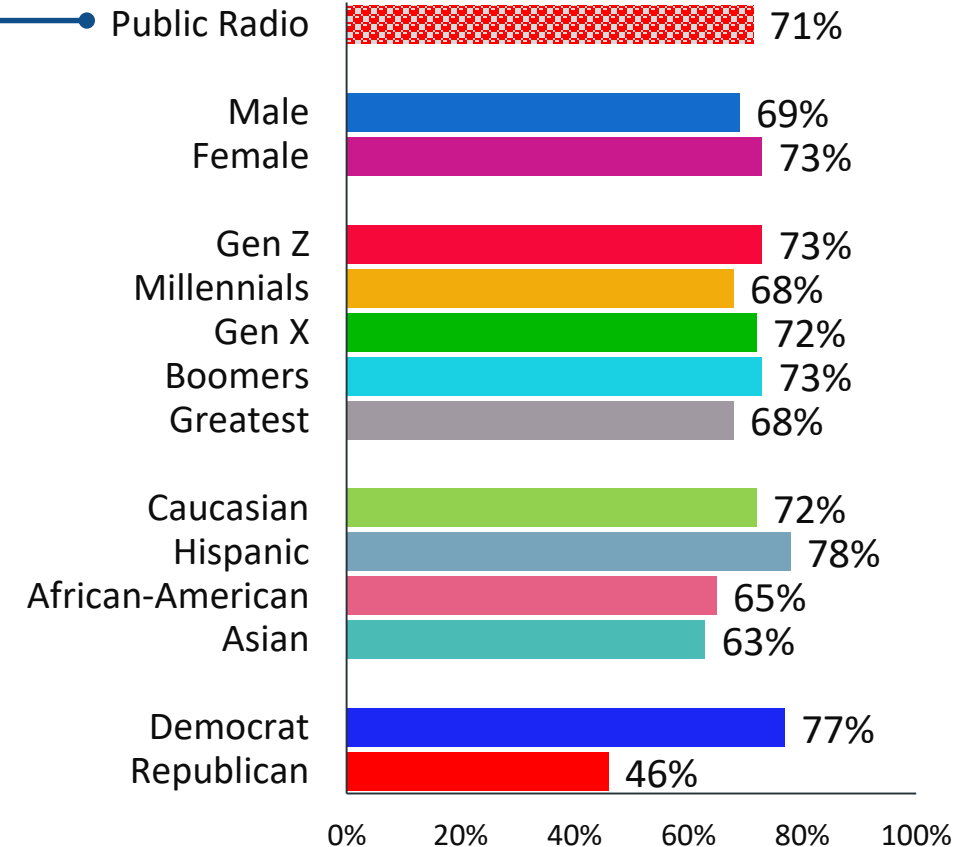
Fair

2%

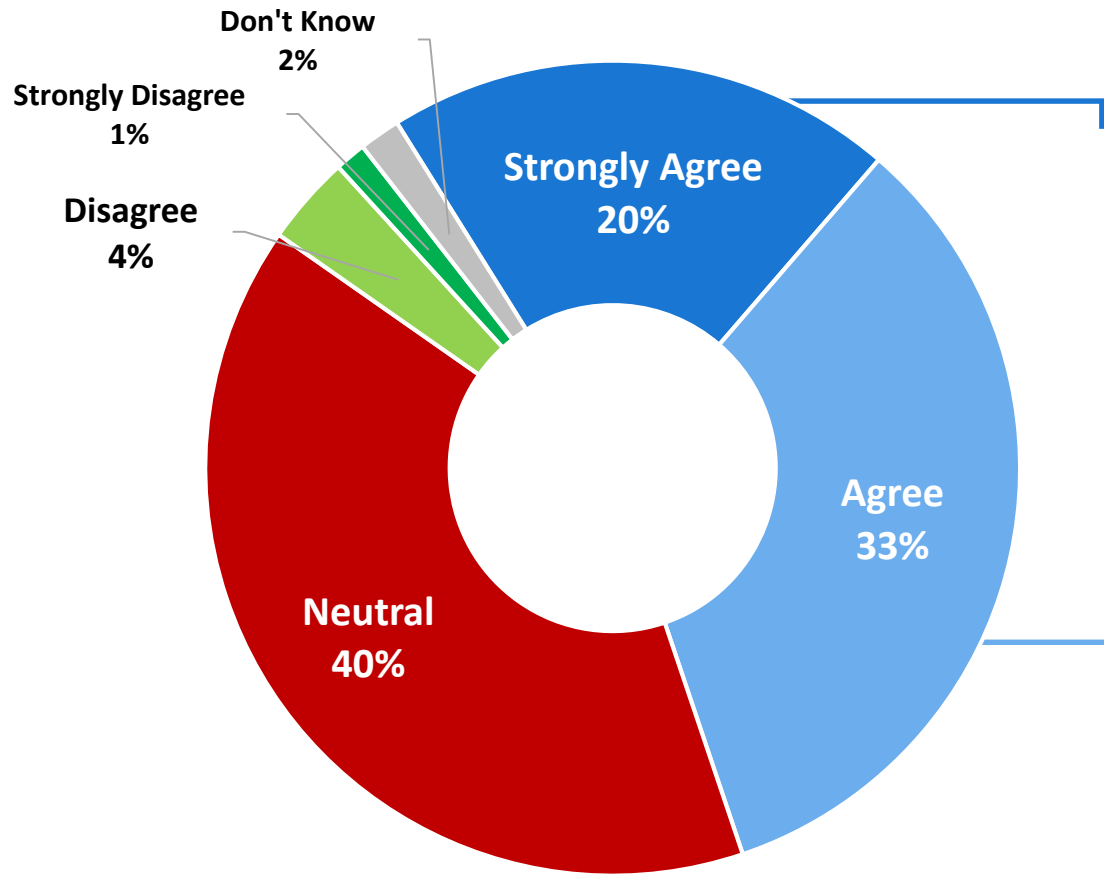


*“Think about your listening to THE STATION THAT SENT YOU THIS SURVEY. How would you rate the station SINCE the start of the coronavirus outbreak?”*

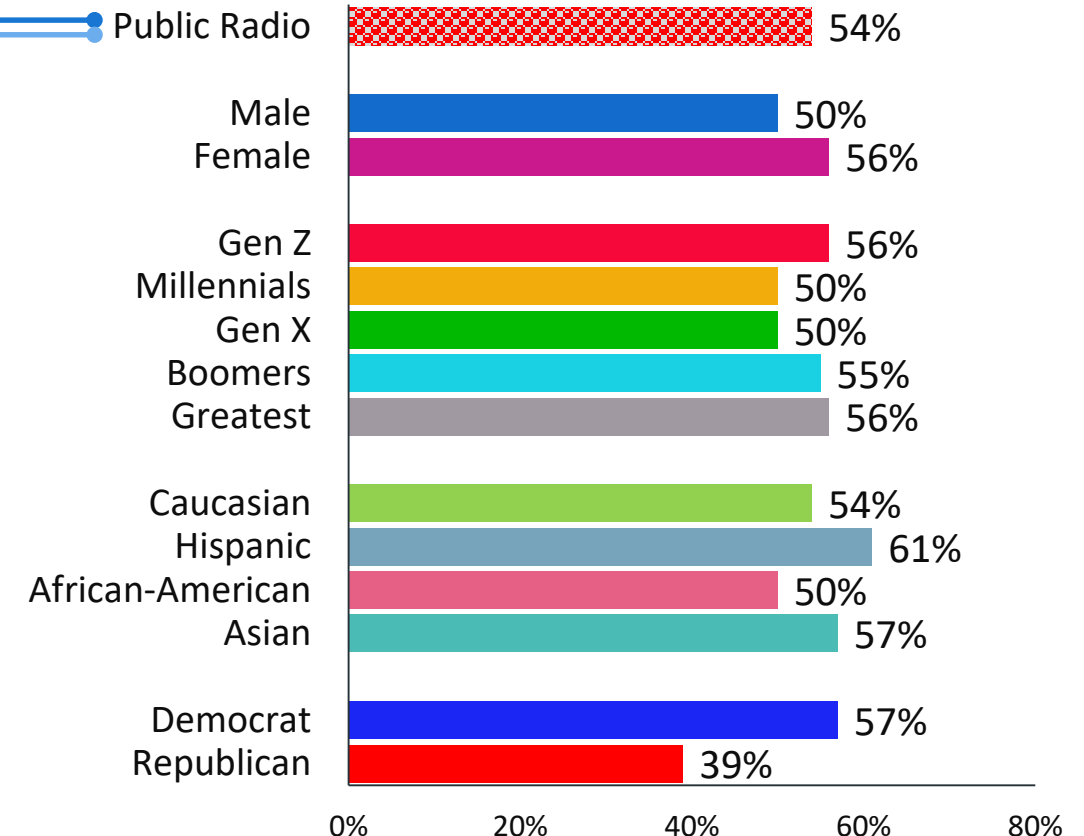
% Who Rate Their Home Station as “Excellent”



# More Than Half Say They Feel a Stronger Connection to Their Favorite Public Station Since the Start of COVID-19



% Agreement (Strongly Agree + Agree)

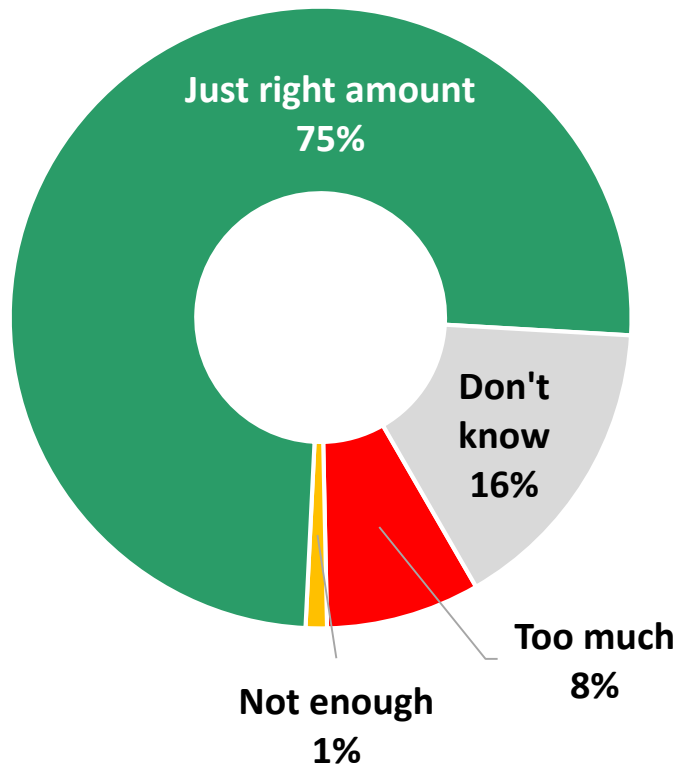


*"Since the start of the coronavirus outbreak, I feel a stronger sense of connection with THE STATION THAT SENT ME THIS SURVEY"*

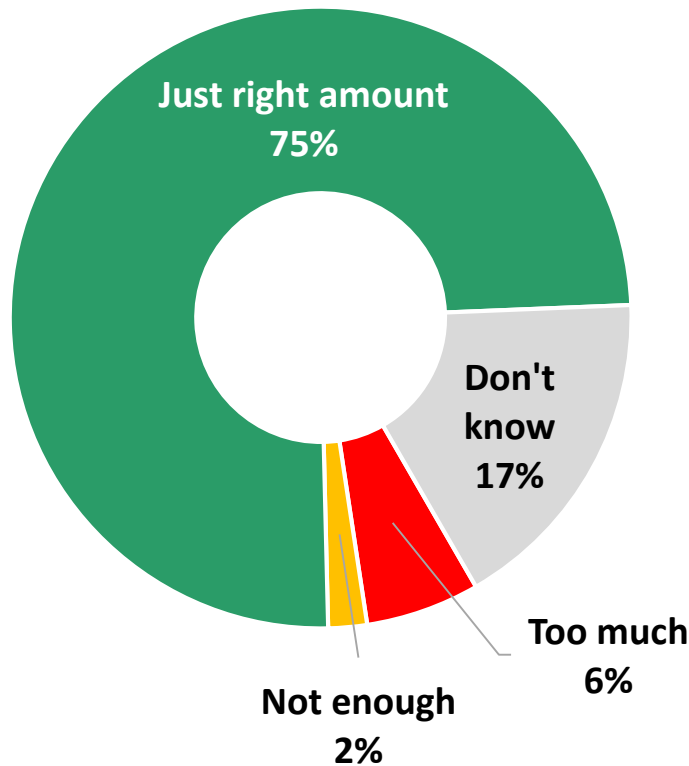


# Three in Four Feel Their Home Public Radio Station Is Paying the Right Amount of Attention to COVID-19

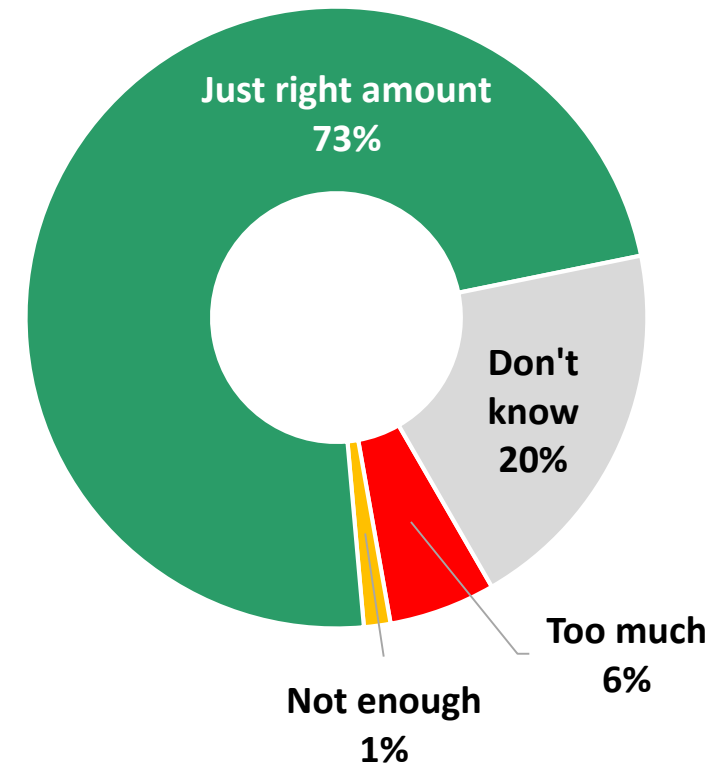
Public Radio



Commercial Radio



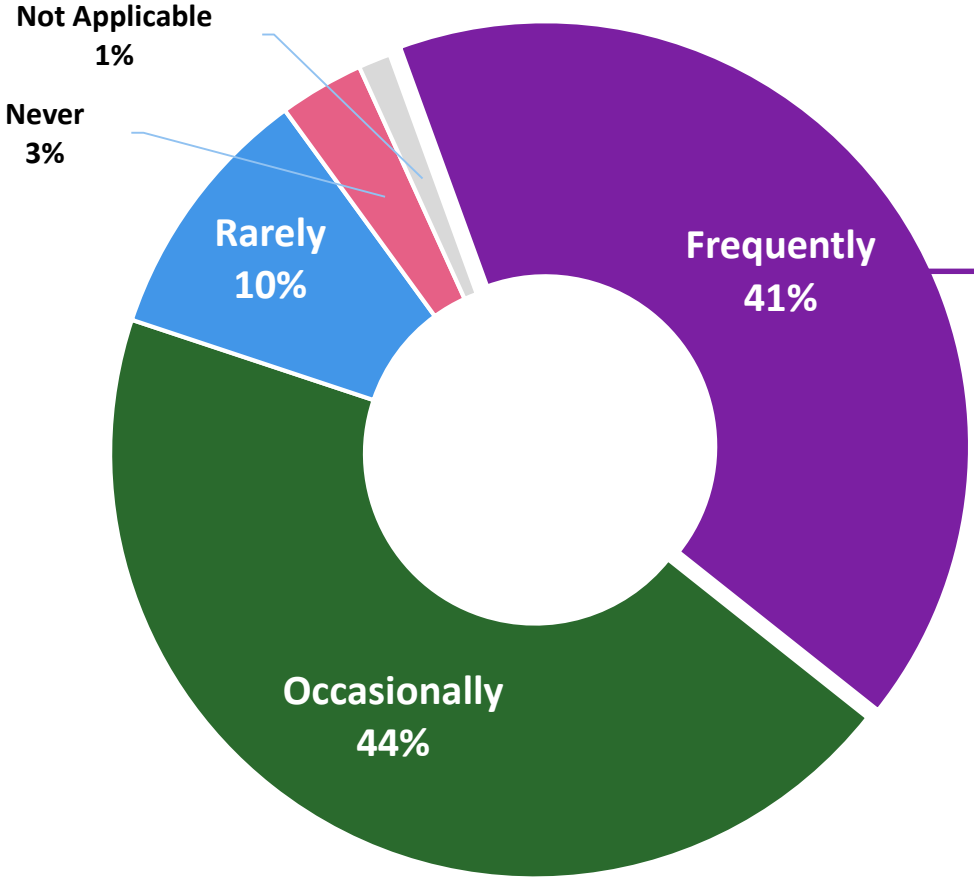
Christian Music Radio



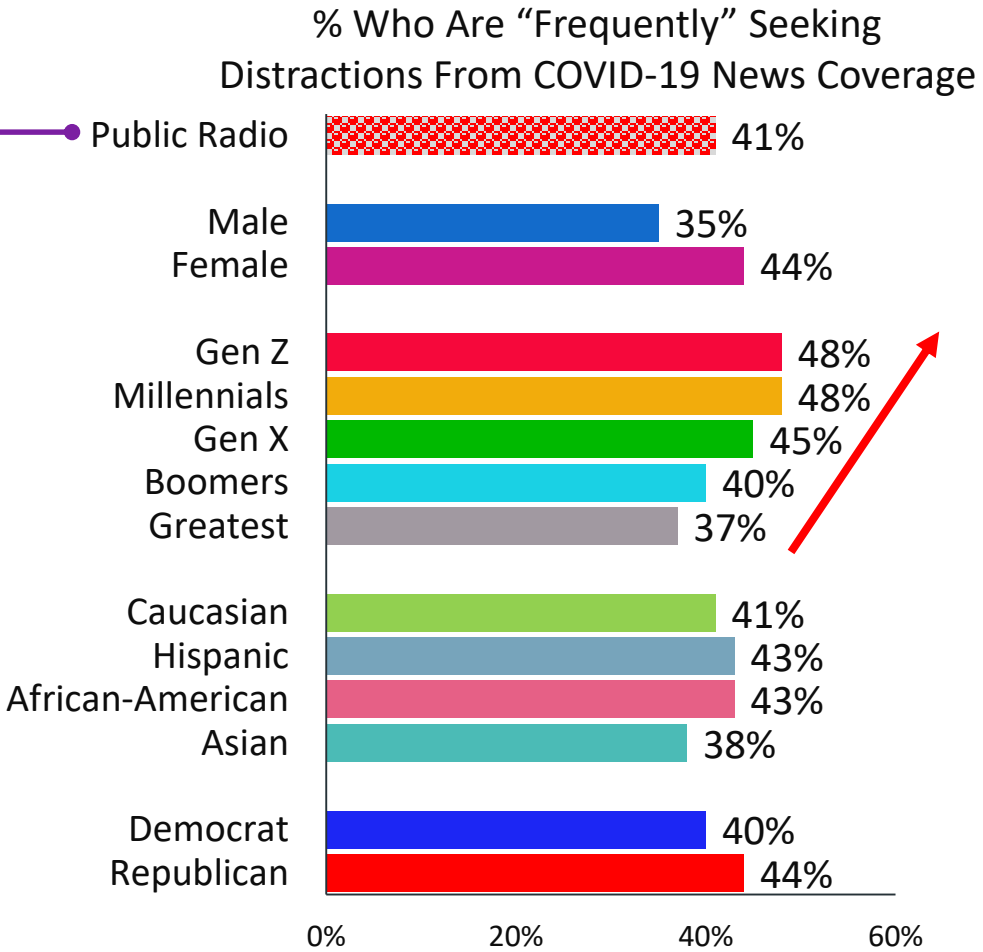


# COVID-19 News Coverage

# About Four in Ten Say They Are Frequently Seeking Distractions From COVID-19 News

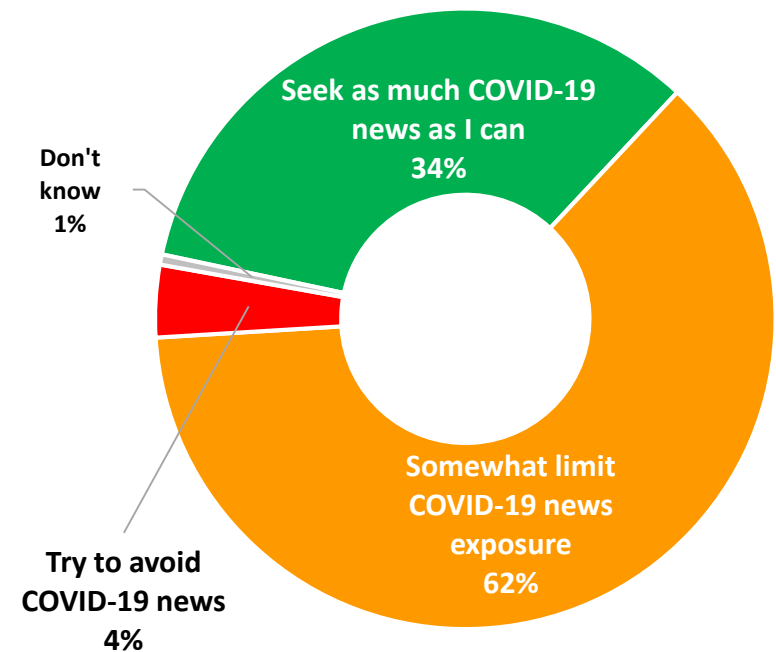


*"At this time, how often are you personally seeking distractions from COVID-19 news coverage?"*

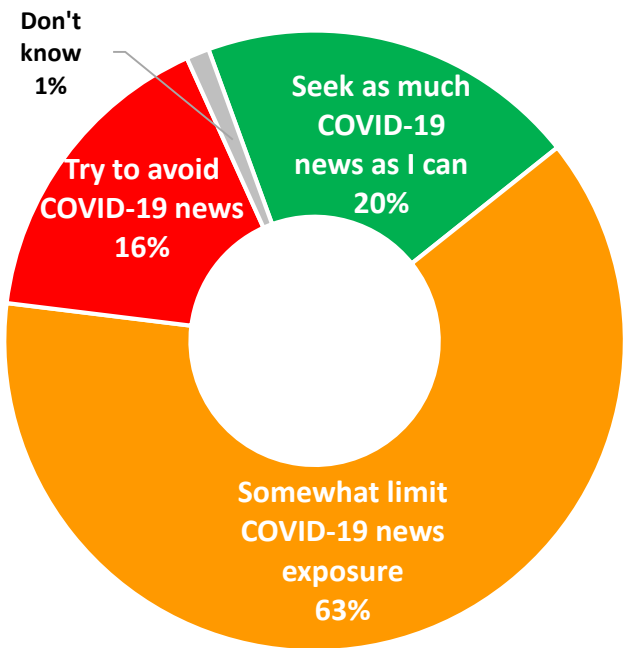


# Most Try to at Least Somewhat Limit Their COVID-19 News Exposure

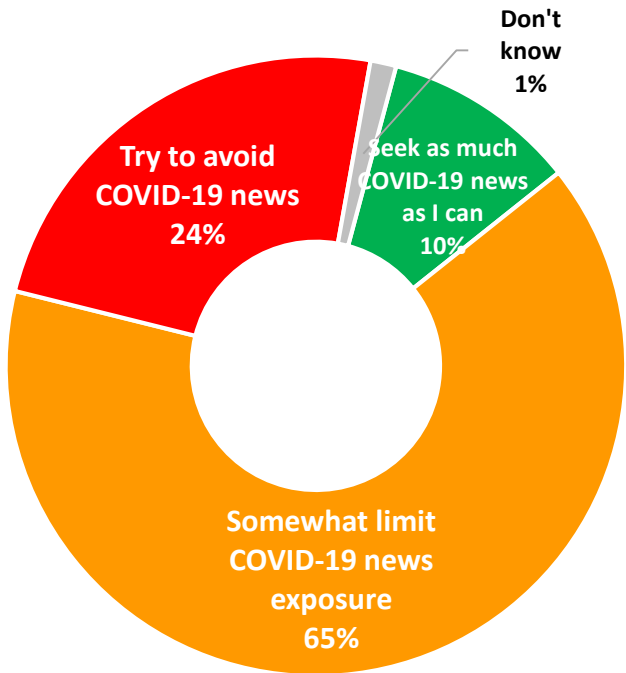
Public Radio



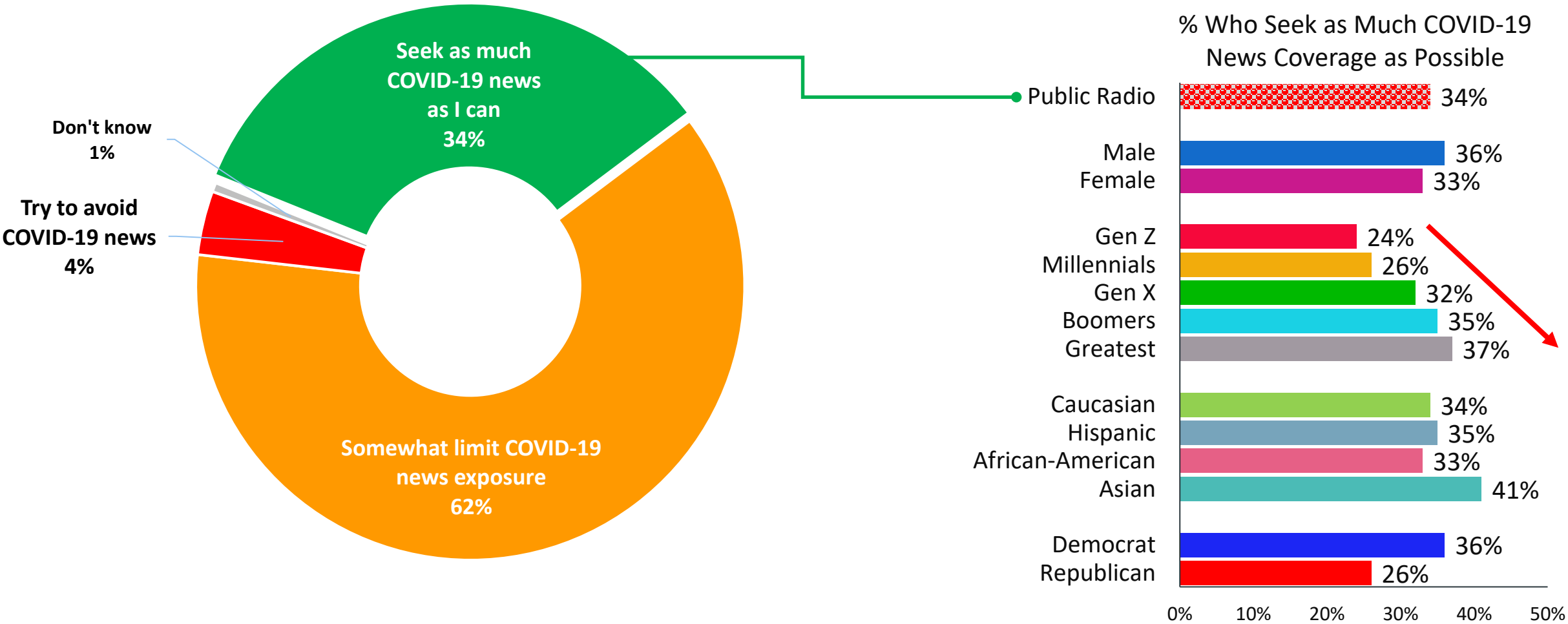
Commercial Radio



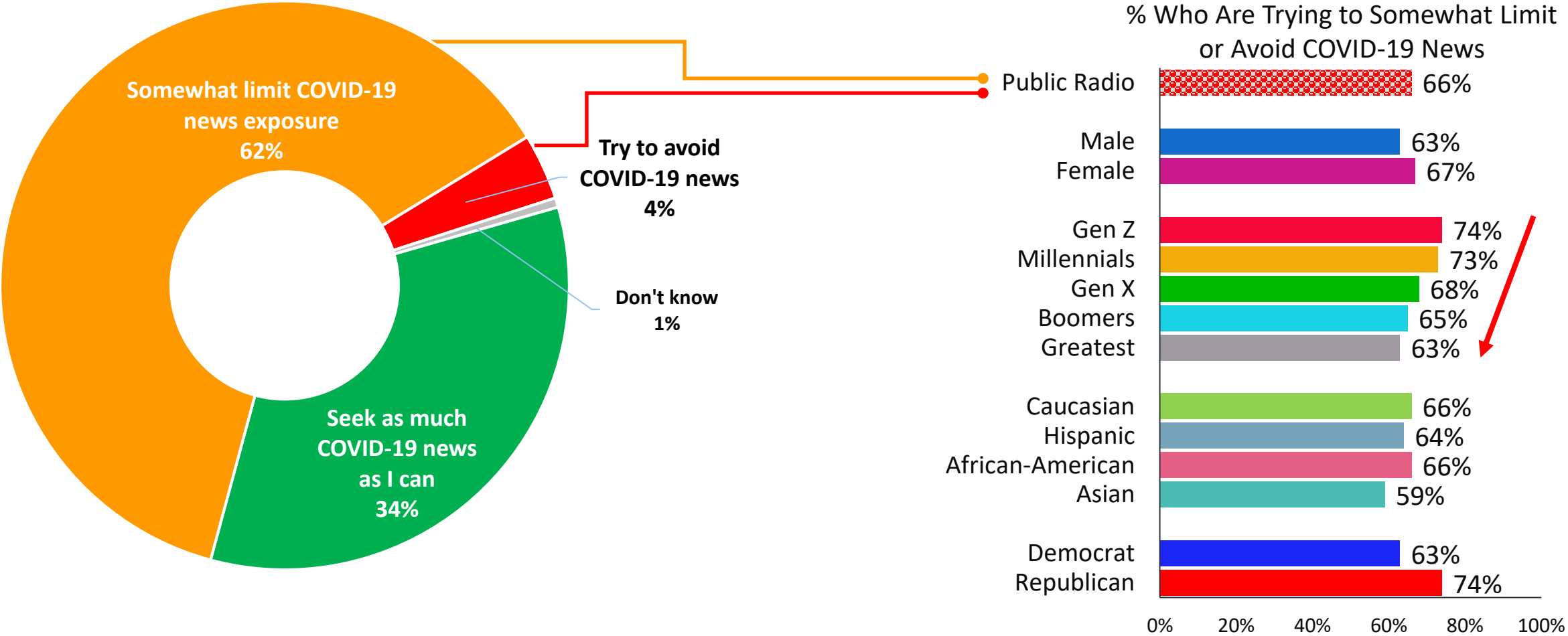
Christian Music Radio



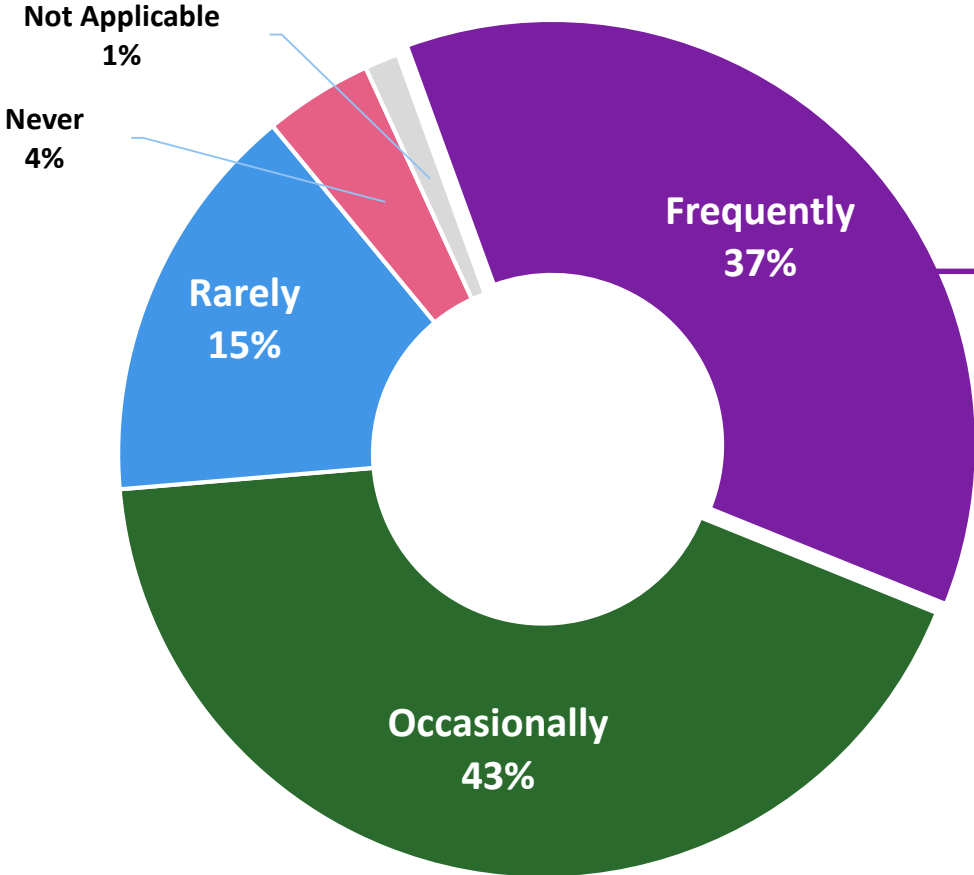
# One in Three Seeks as Much COVID-19 News as Possible



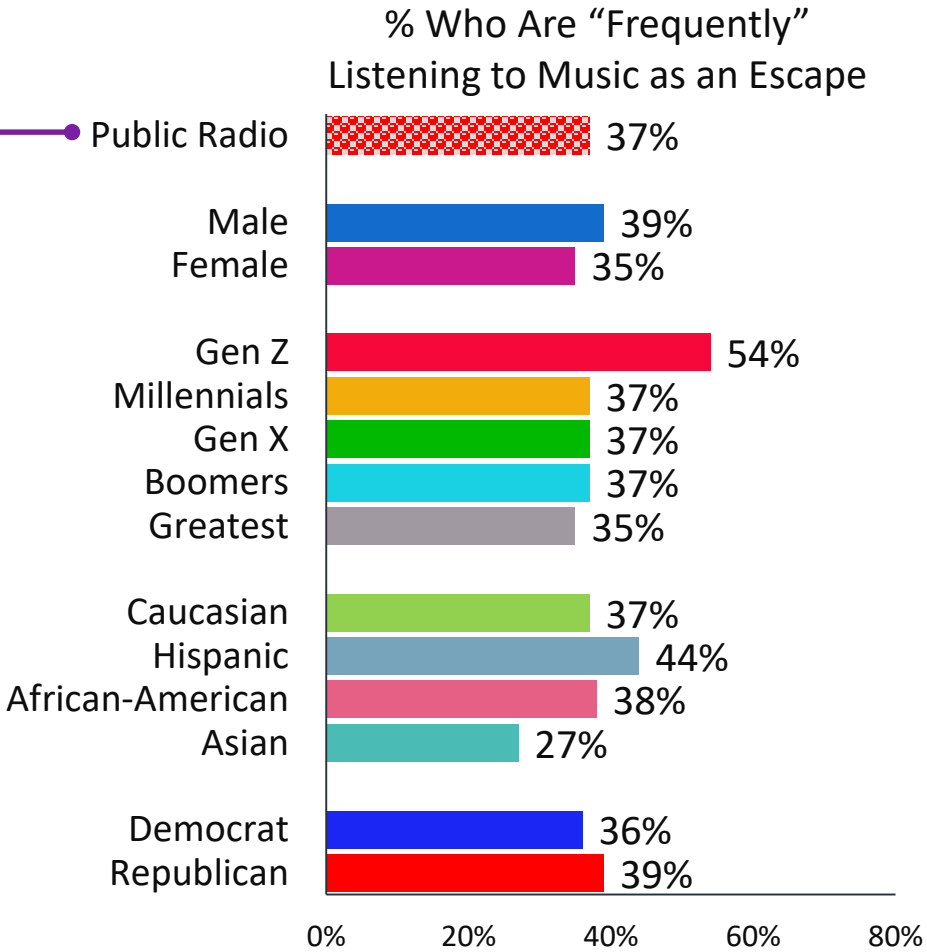
# Two in Three Are Trying to Limit or Avoid COVID-19 News



# More Than One in Three Is Frequently Listening to Music as an Escape



*"At this time, how often are you personally listening to music as an escape?"*



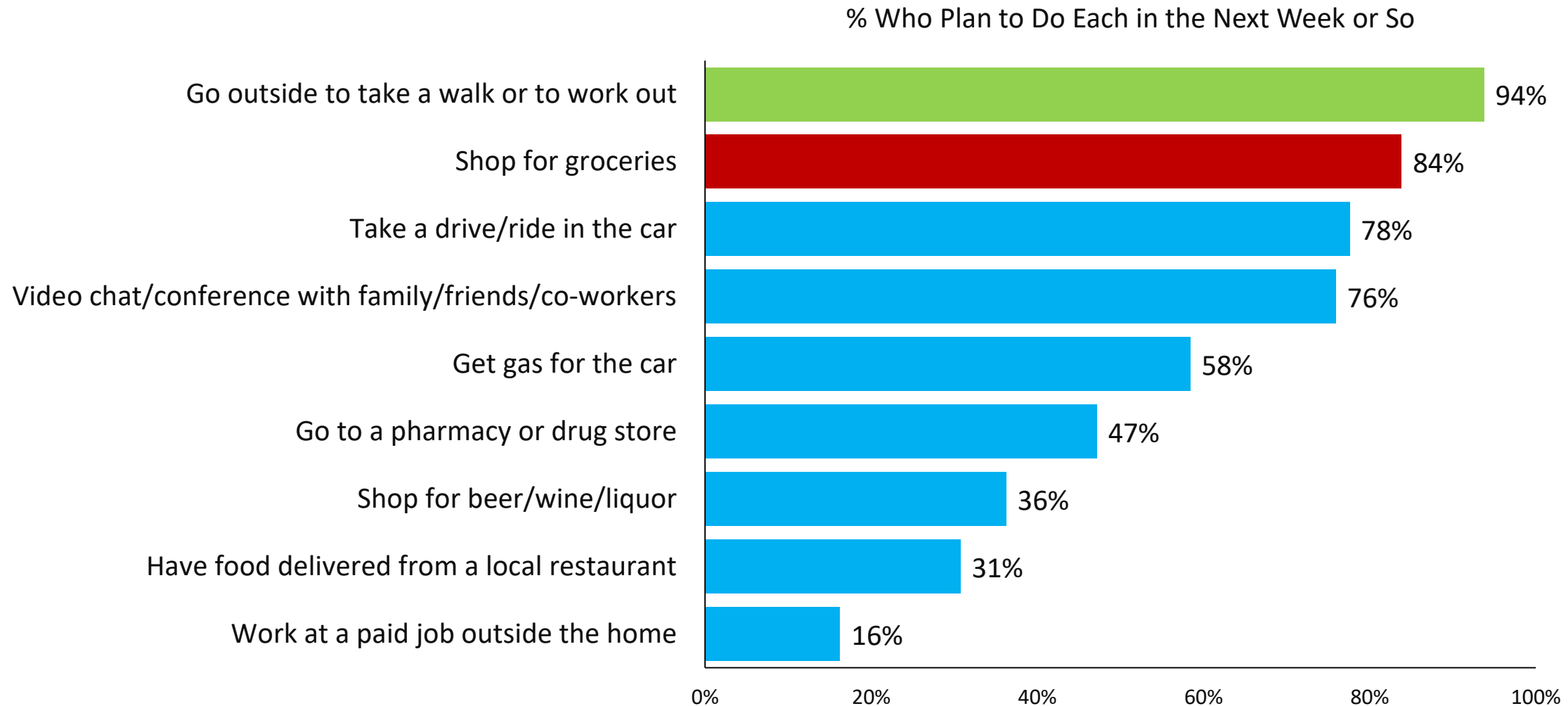




# Consumer Buying & Shopping Behavior

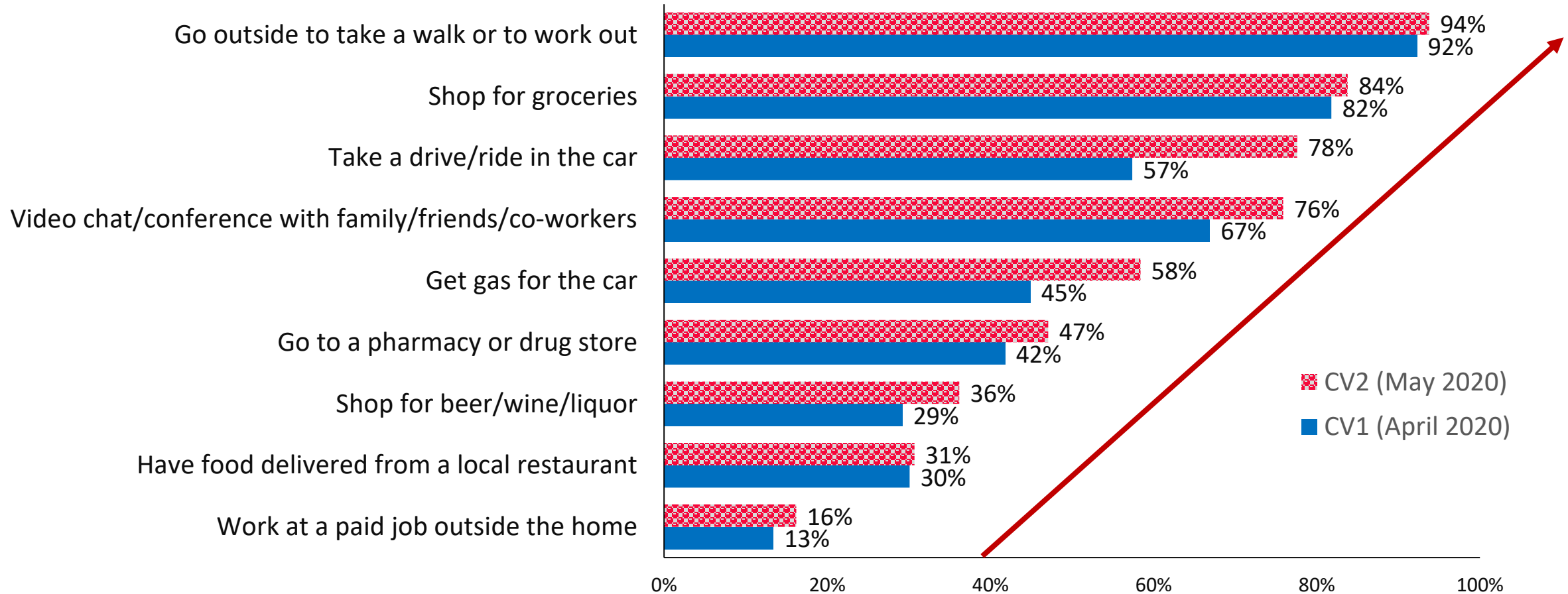


# In the Coming Week, Most Plan to Walk/Workout, Go Grocery Shopping, Take a Car Drive/Ride and Video Chat



# Compared to Six Weeks Ago, There Is More Planned Participation in the Coming Week For All Activities

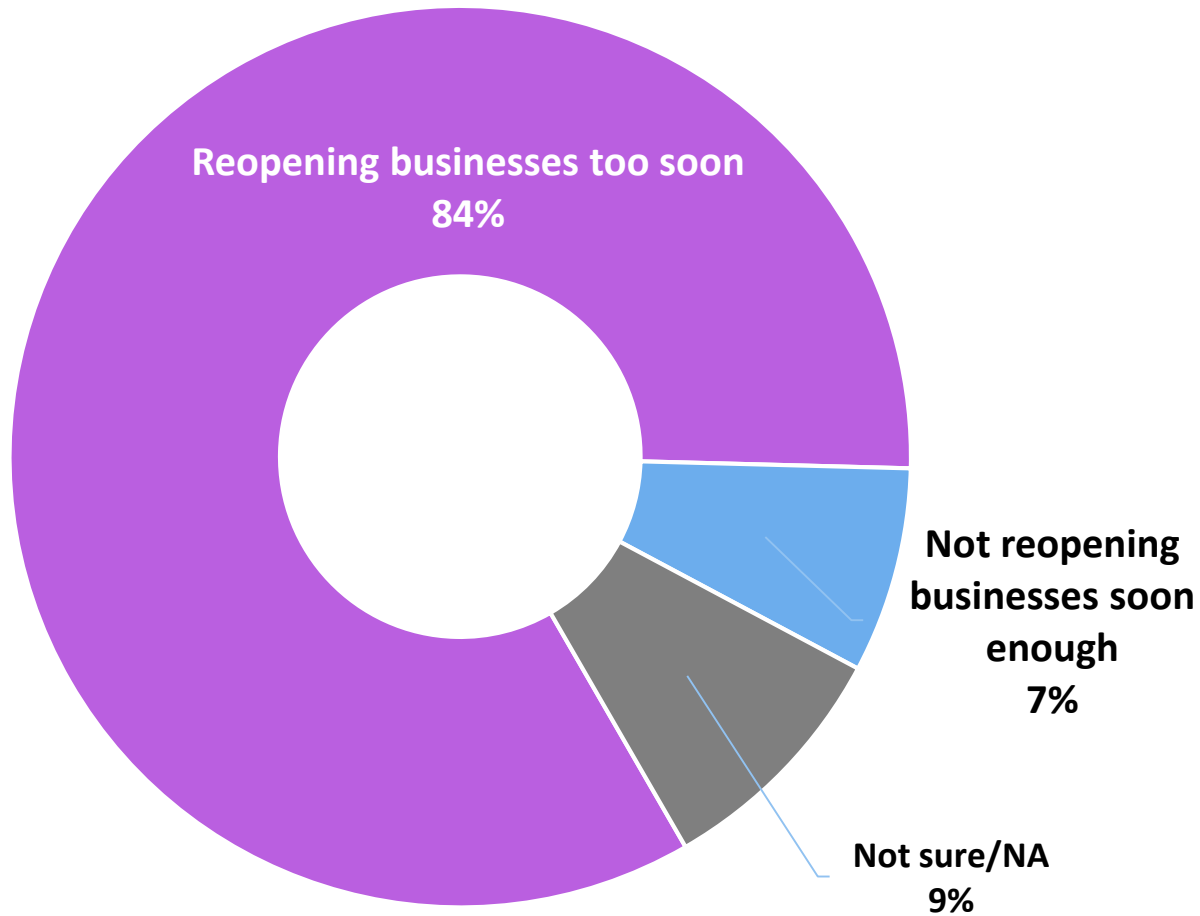
% Who Plan to Do Each in the Next Week or So





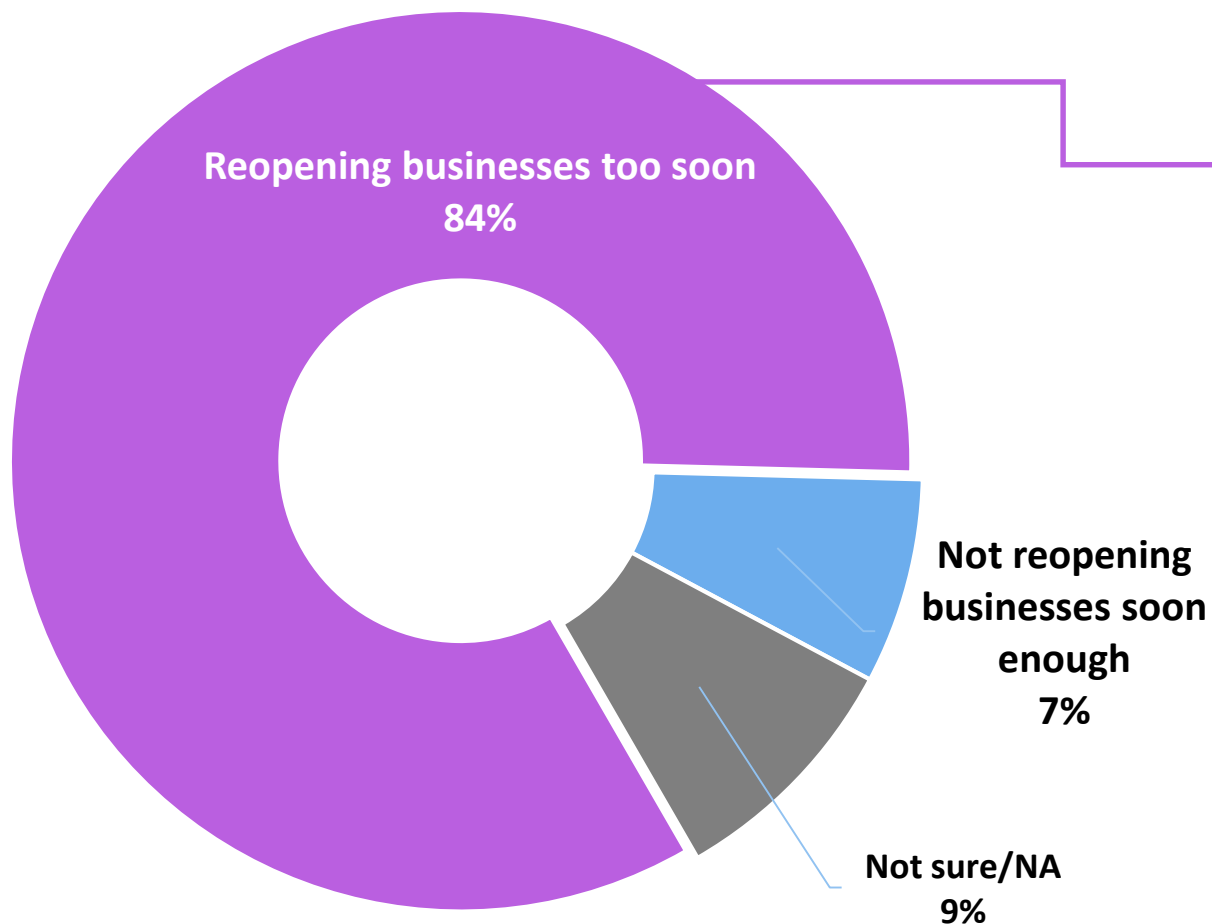
# Interest in Activities vs. Risk

# The Vast Majority Are Concerned About Opening Businesses Too Soon Rather Than Not Soon Enough

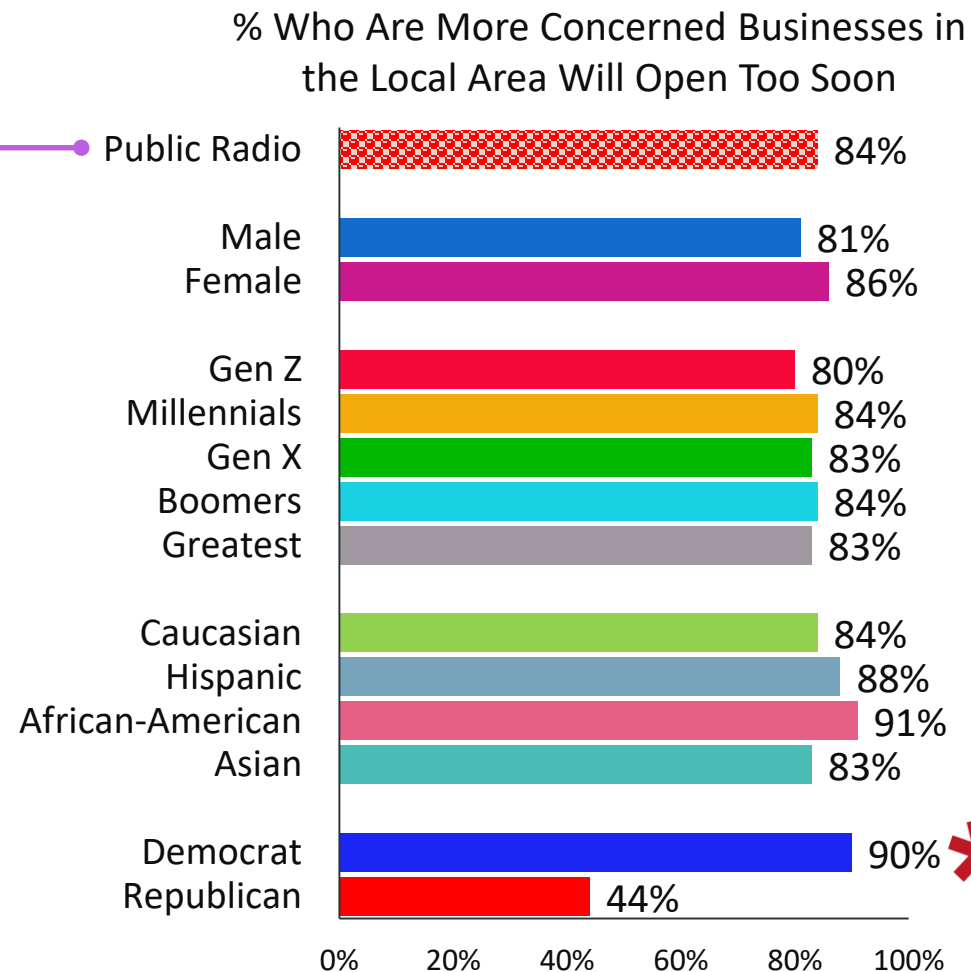


*"Which of the following is a bigger concern to you in your local area?"*

# The Vast Majority Are Concerned About Opening Businesses Too Soon Rather Than Not Soon Enough

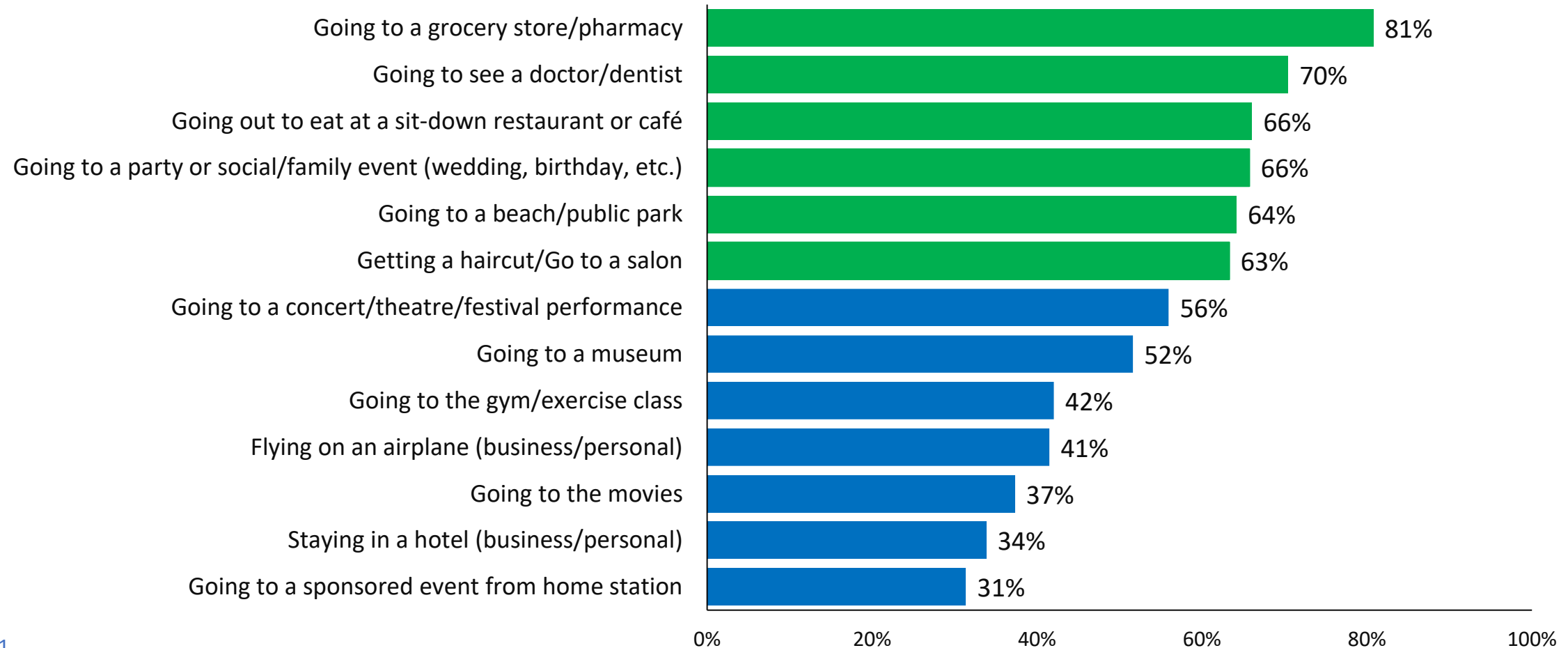


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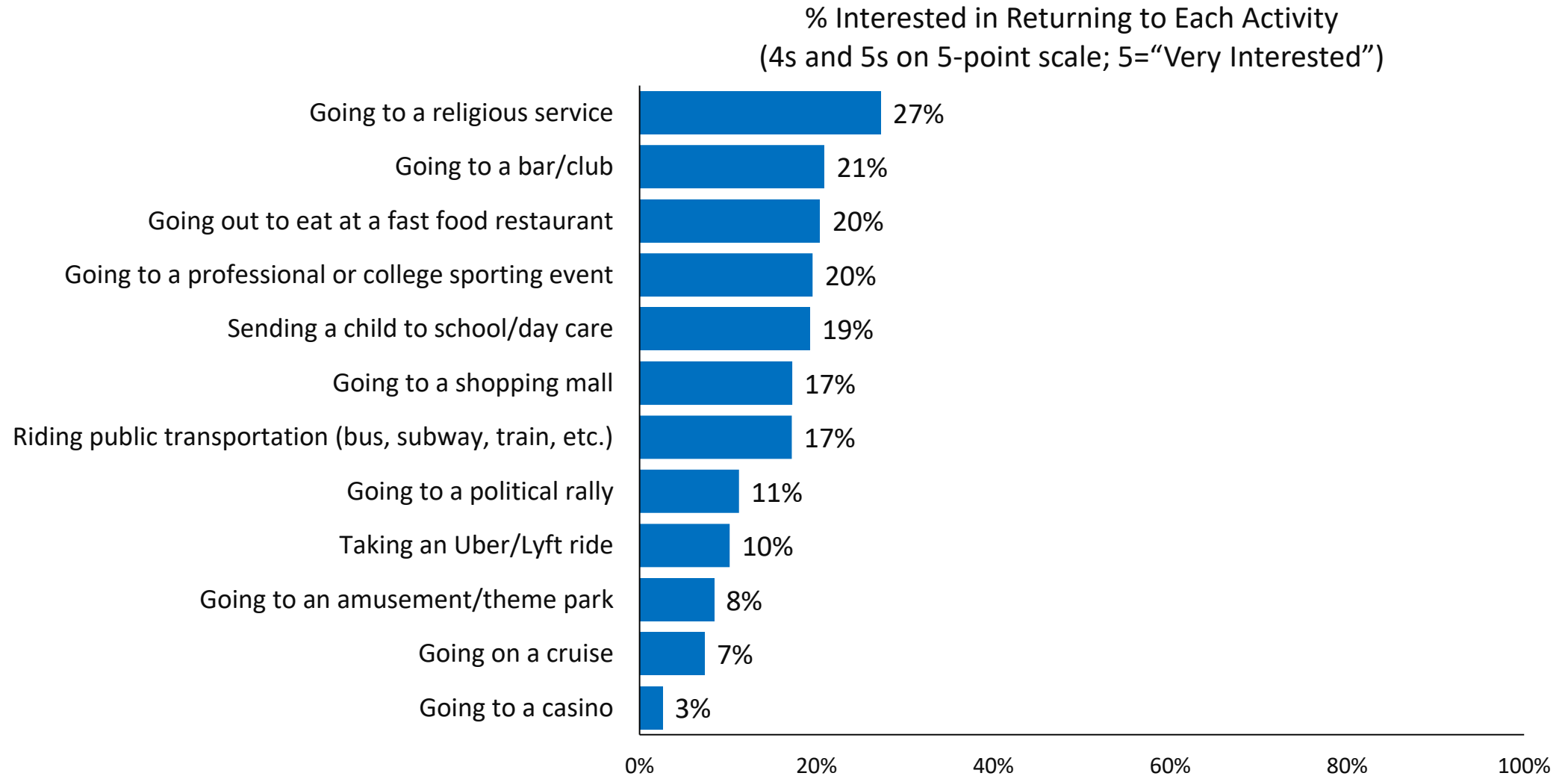


# Grocery Shopping and Visiting a Doctor/Dentist Are the Activities With Highest Interest in Resuming

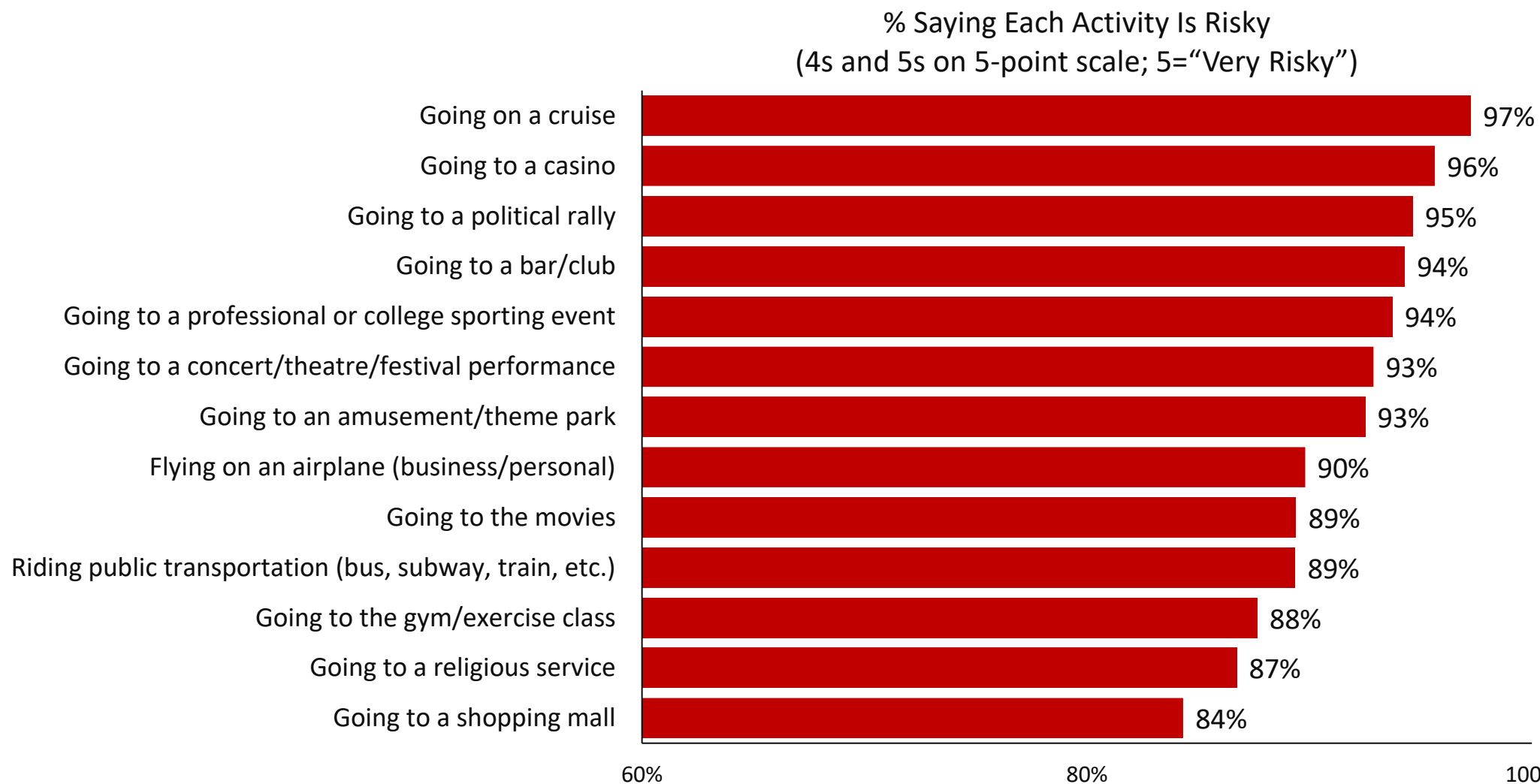
% Interested in Returning to Each Activity  
(4s and 5s on 5-point scale; 5="Very Interested")



# Casinos, Cruises, and Amusement/Theme Parks Are Currently of Least Interest to Public Radio Listeners

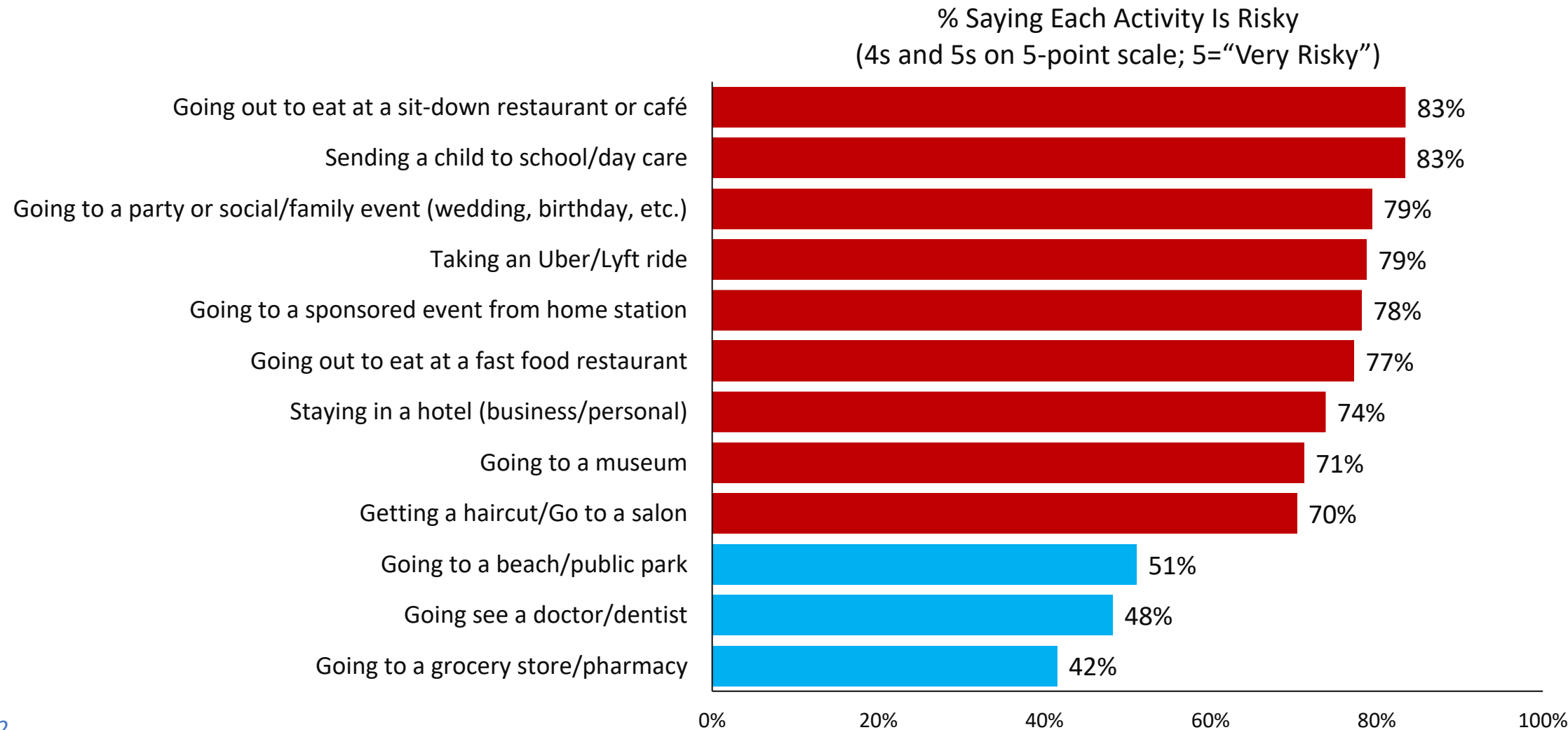


# Many Activities Are Currently Seen as Very or Somewhat Risky by Nearly All Respondents

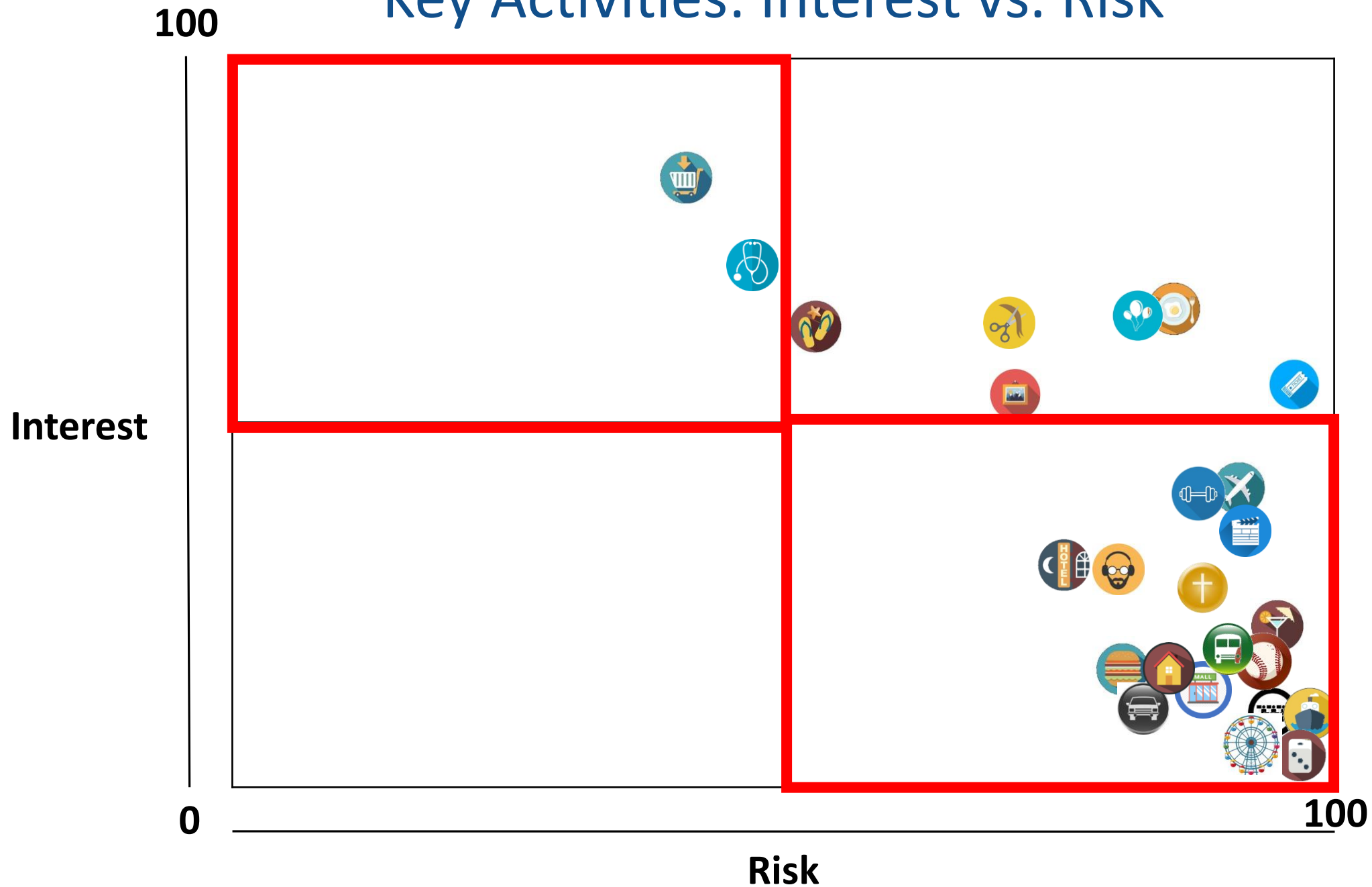




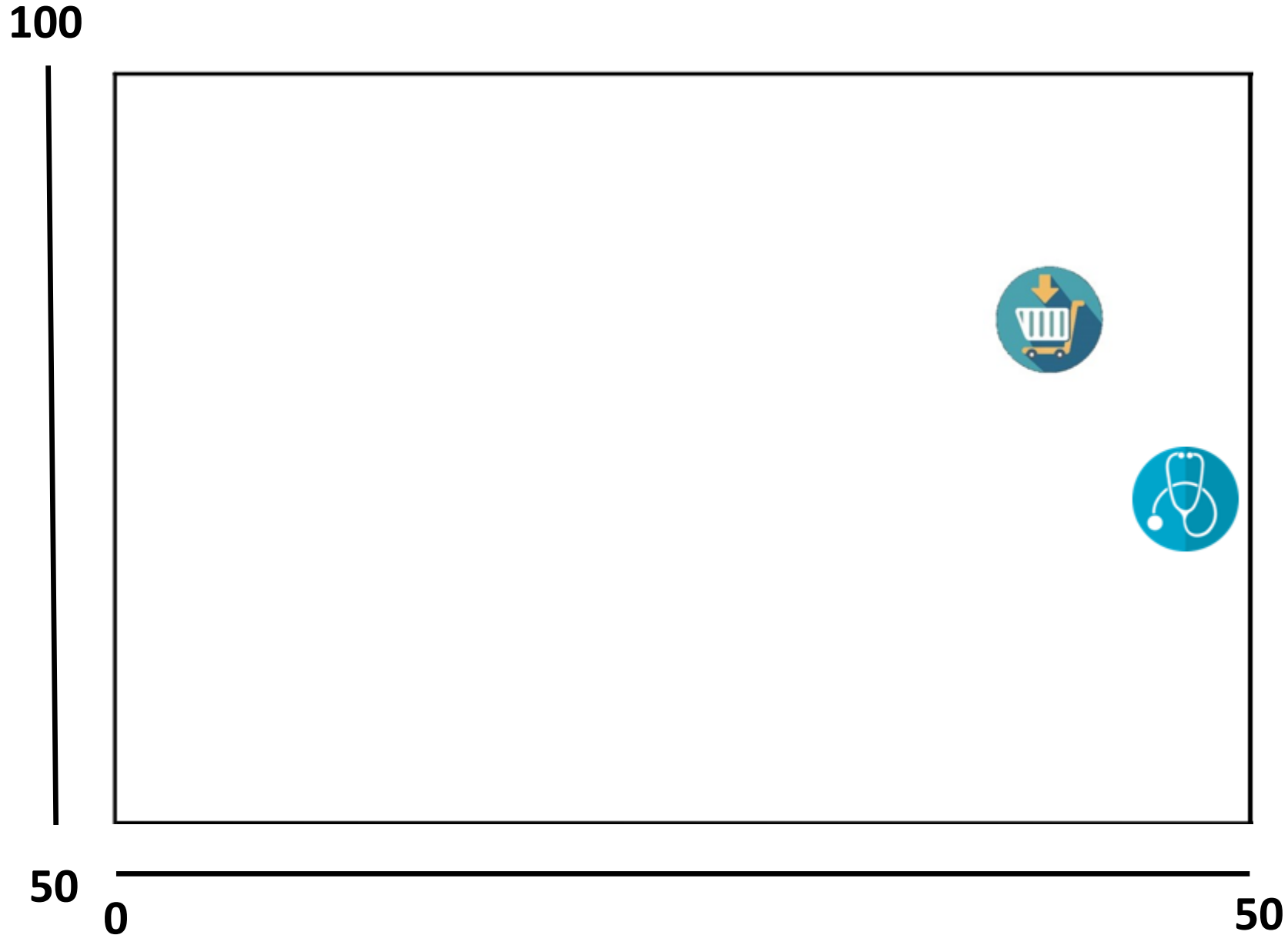
# The “Least Risky” Activities: Going to a Grocery Store/Pharmacy, Visiting a Doctor/Dentist, and Going to a Beach or Park



# Key Activities: Interest vs. Risk

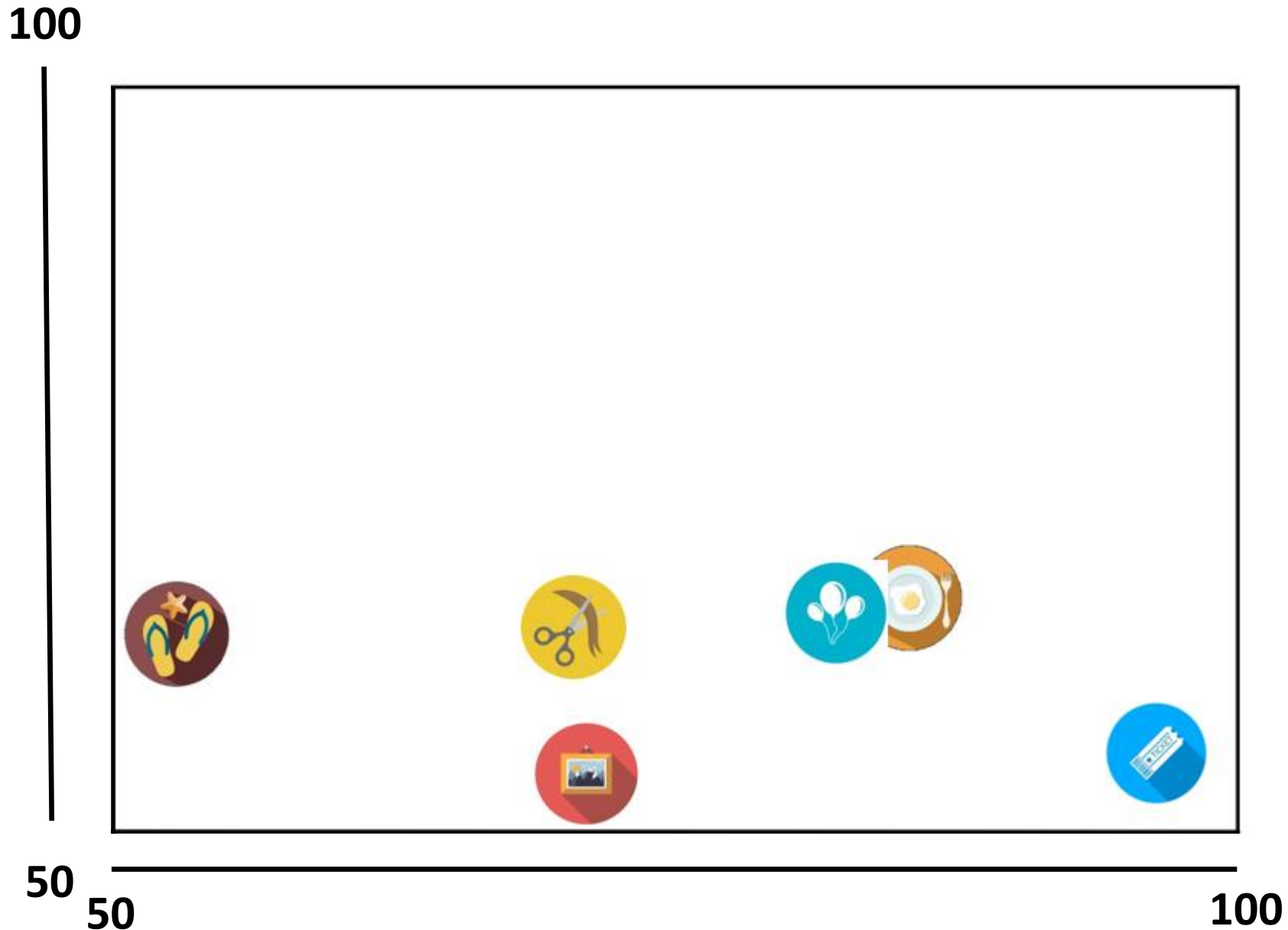


# Key Activities: High Interest/Low Risk



Grocery/Pharmacy	
Doctor/Dentist	

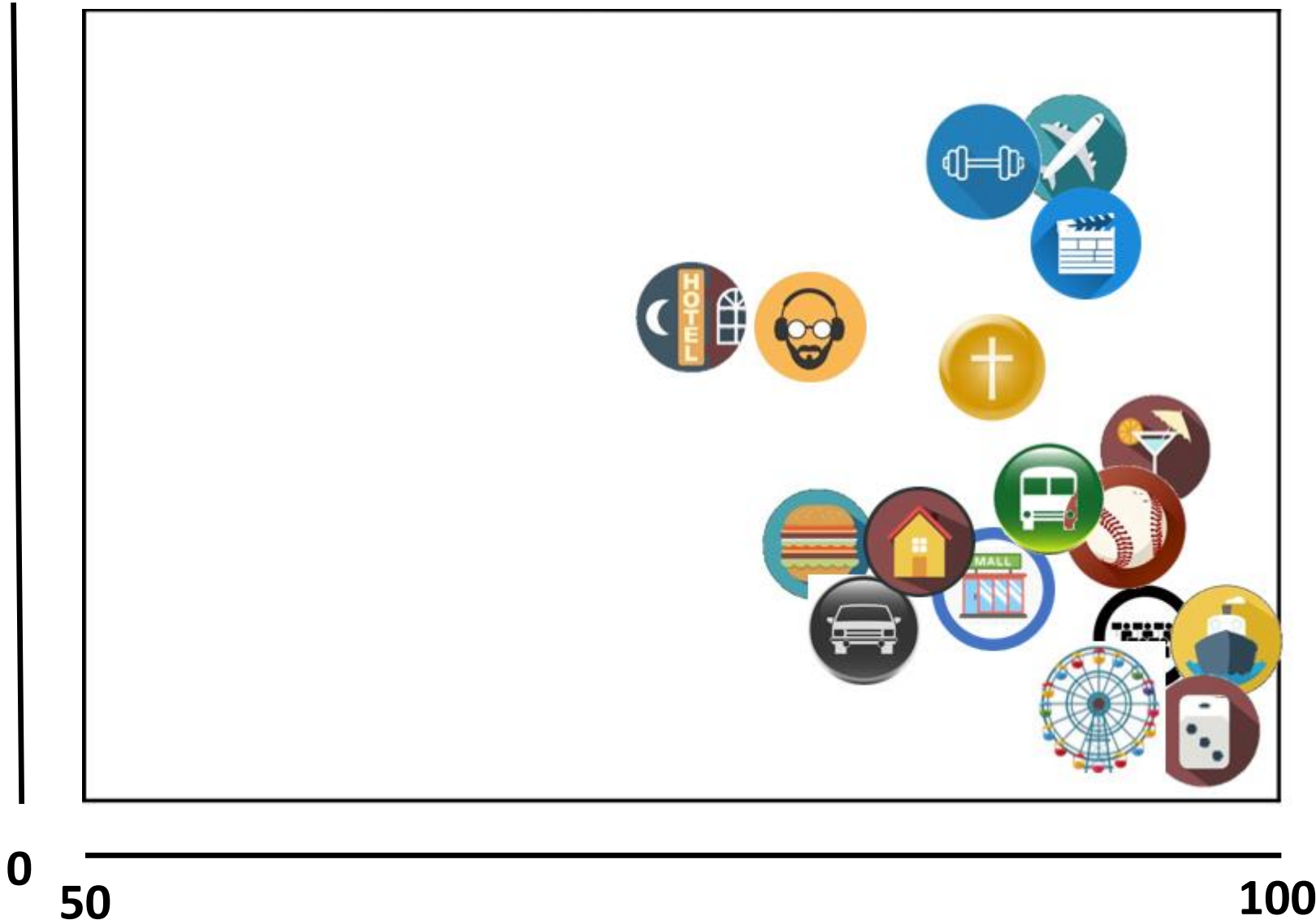
# Key Activities: High Interest/High Risk




















Party/Family event	
Sit-Down restaurant	
Beach/Public park	
Concert/Theater	
Haircut/Salon	
Museum	

# Key Activities: Low Interest/High Risk

50



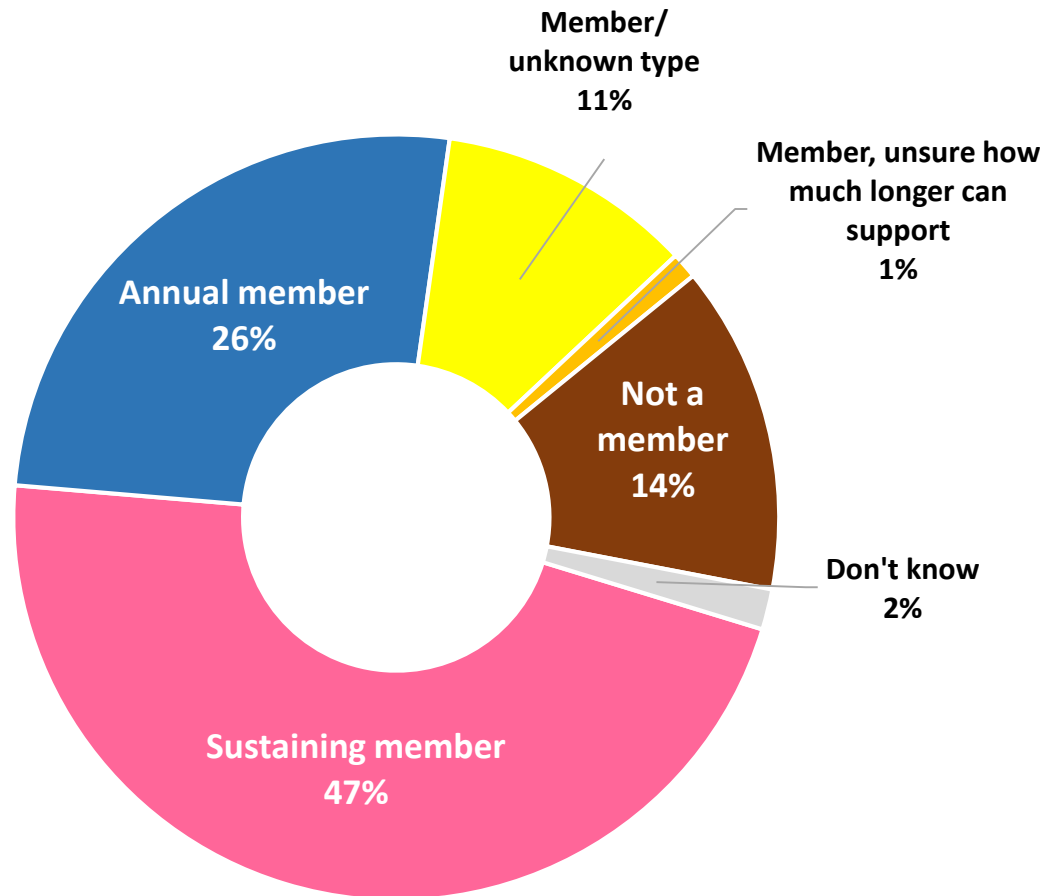
Fast food	
Stay At hotel	
Radio station event	
Religious service	
Uber/Lyft	
Gym/Exercise class	
Movie	
Mall	
School/Daycare	
Amusement park	
Casino	
Public transportation	
Bar	
Sports event	
Airplane travel	
Cruise	
Political rally	



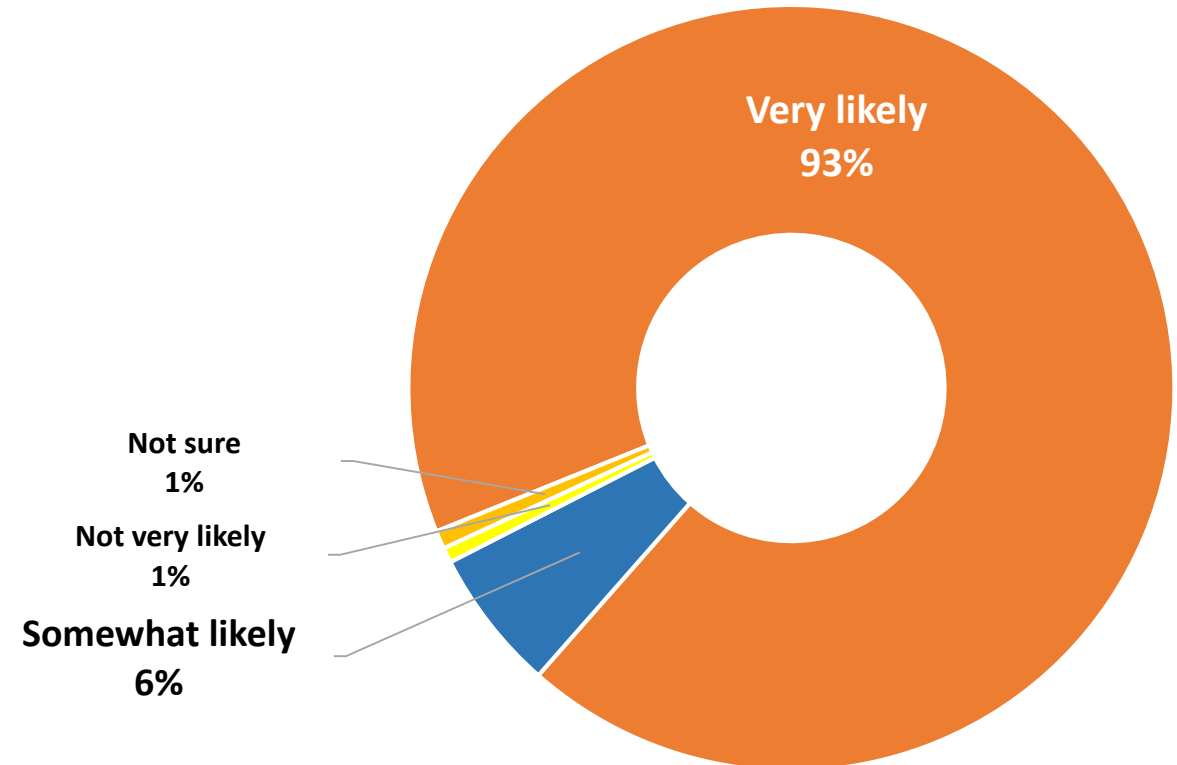
# Membership and Fundraising

# Most Are Sustaining Members, and Plan to Retain Membership Through 2020

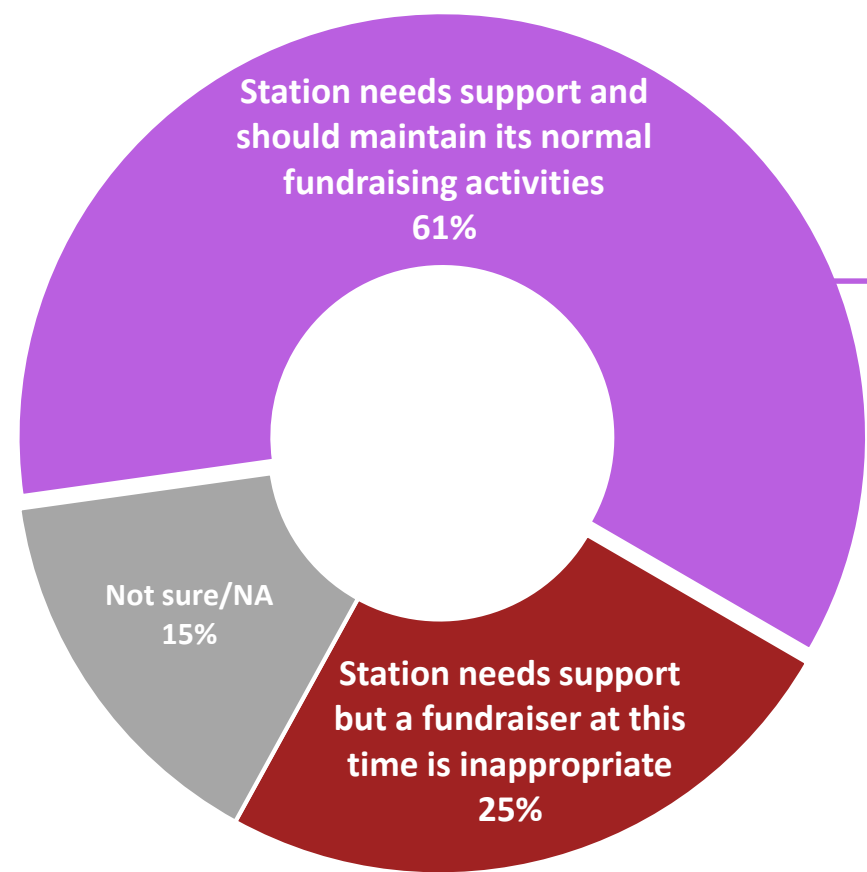
Station Membership



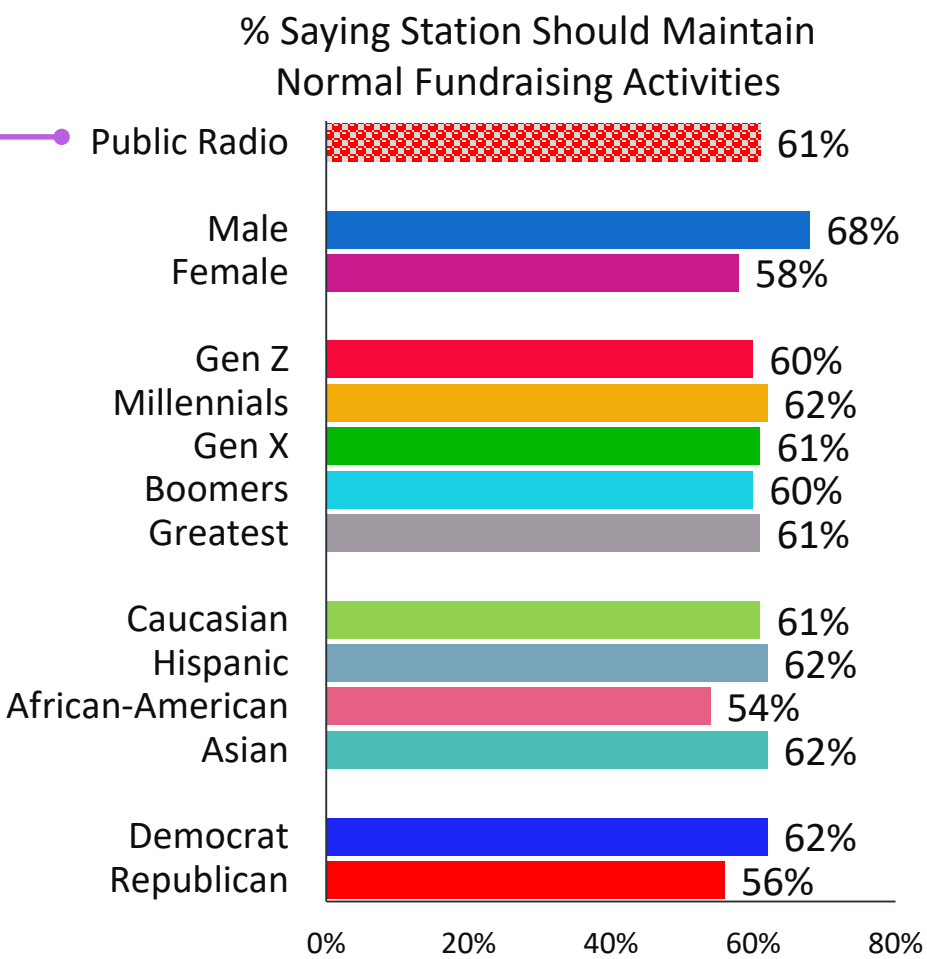
Likelihood to Remain a Member Through End of 2020? (Among Current Members)



# Most Agree Normal Fundraising Can and Should Continue at This Time

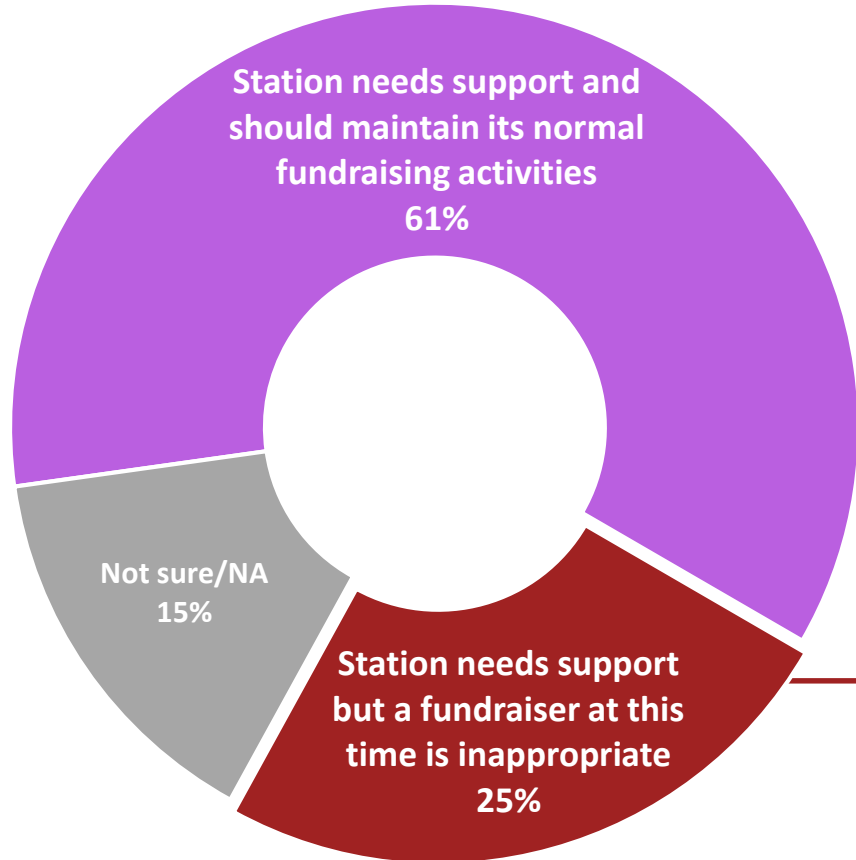


*“Which of these statements best describes how THE STATION THAT SENT YOU THIS SURVEY should raise funds during the coronavirus outbreak?”*

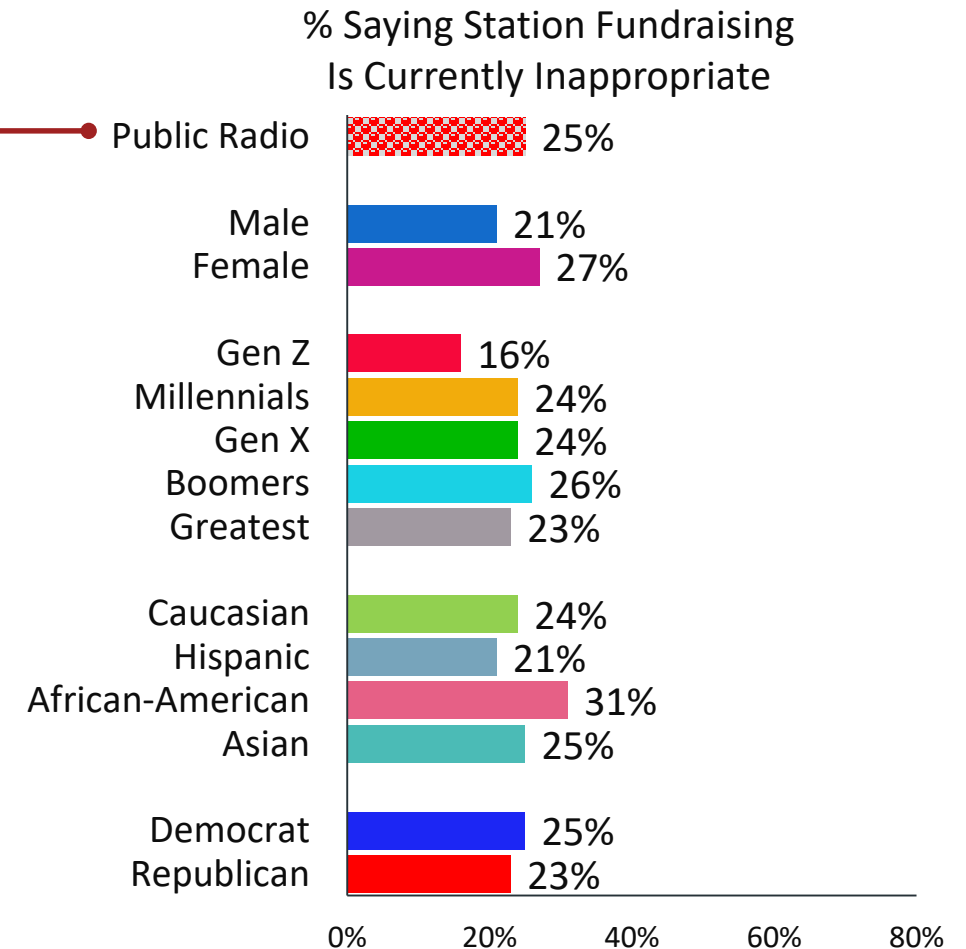




# However, One in Four Say Fundraising Is Currently Inappropriate



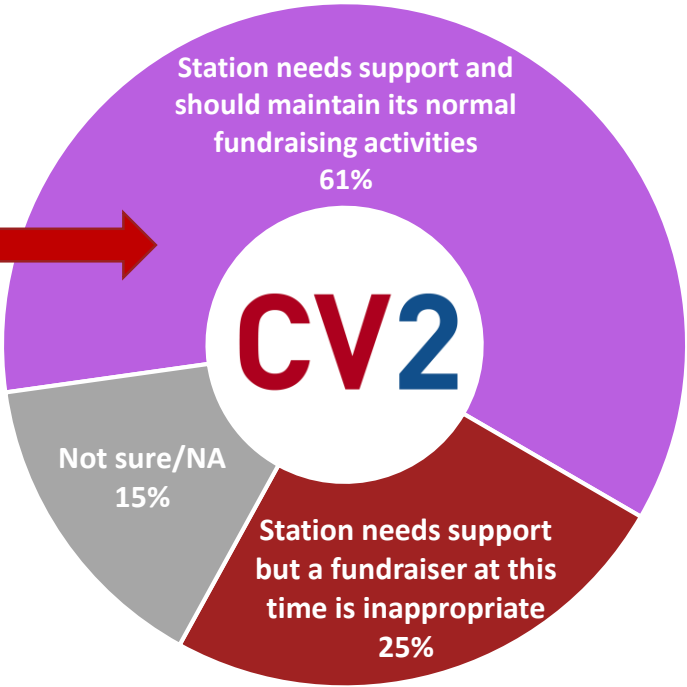
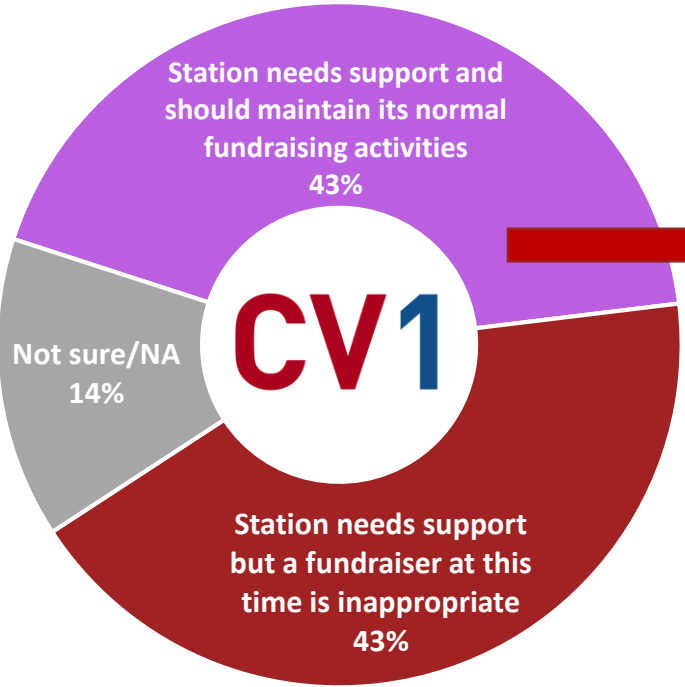
*"Which of these statements best describes how  
THE STATION THAT SENT YOU THIS SURVEY should  
raise funds during the coronavirus outbreak?"*



# Fundraising Is Given a “Green Light” Now

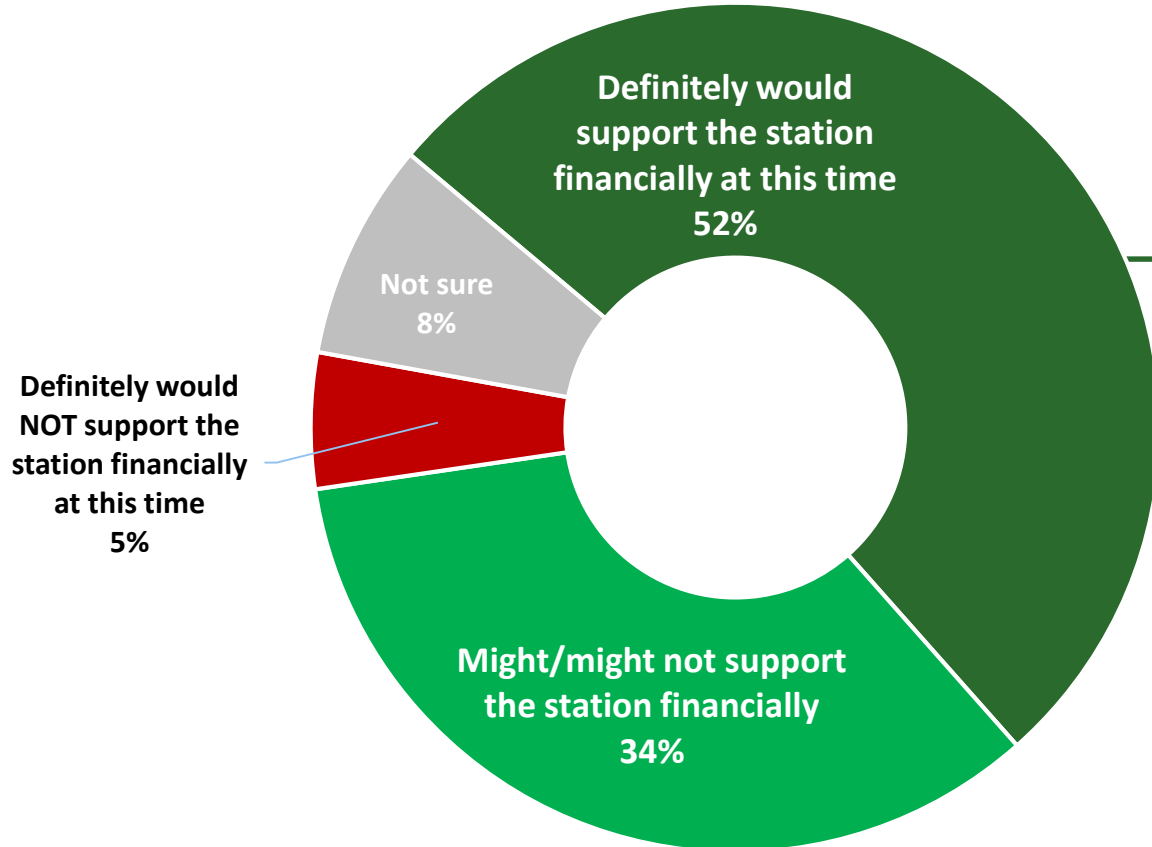
April 2020

May 2020

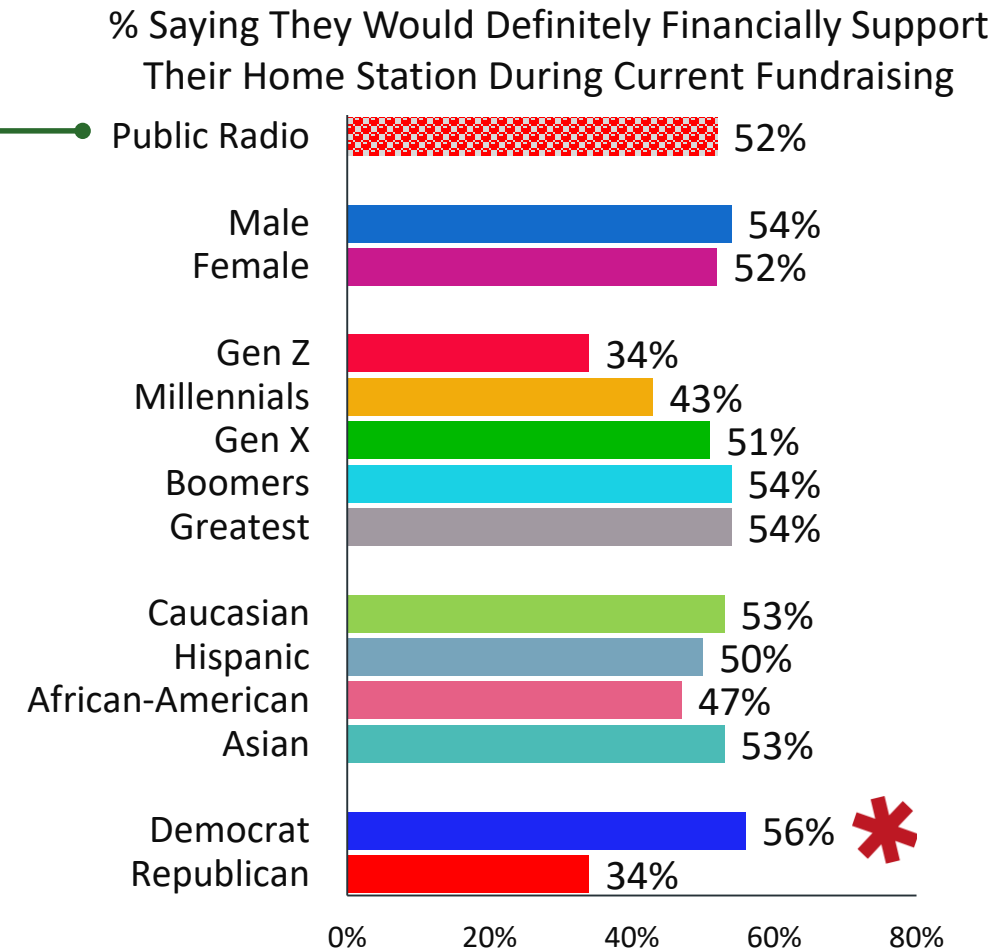


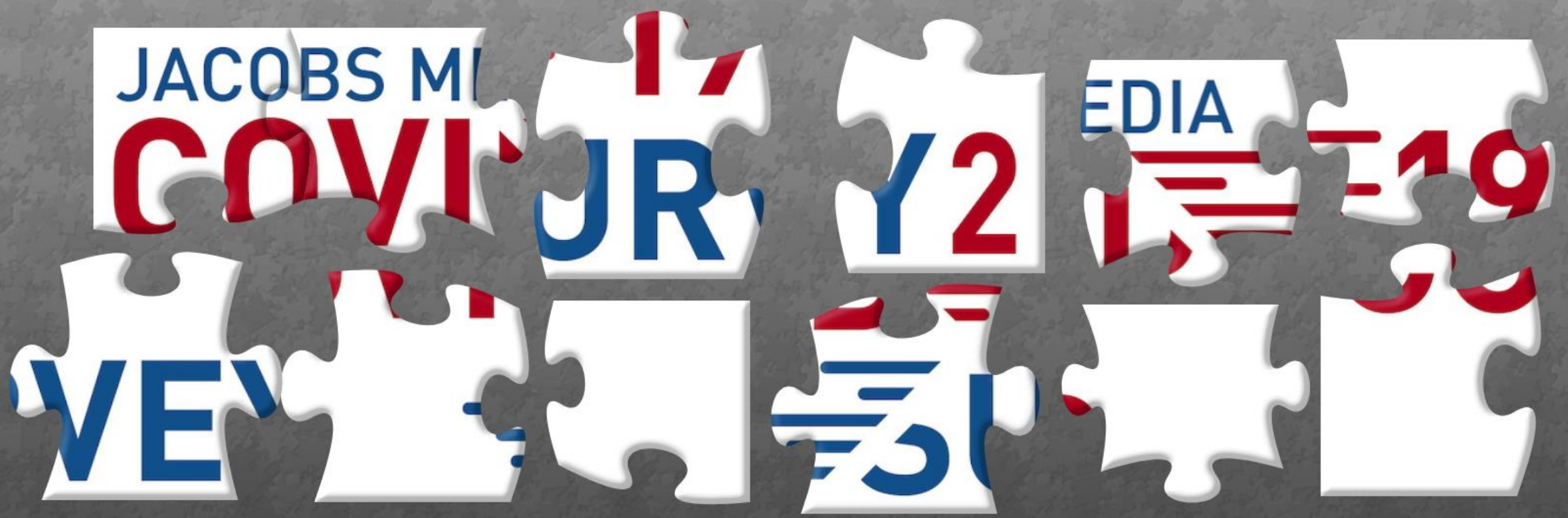
*“Which of these statements best describes how THE STATION THAT SENT YOU THIS SURVEY should raise funds during the coronavirus outbreak?”*

# Half Say They Would Definitely Support Their Home Public Radio Station's Fundraising Efforts at This Time



*"Given some of the economic pressures in the current environment, THE STATION THAT SENT YOU THIS SURVEY may still feel the need to fundraise at this time. Which of the following best describes your likely response?"*





# Takeaways & Action Steps

# Key Findings

- Consumers are beginning to cope & accept COVID-19
- It continues to be perceived as a full-blown crisis, and now twice as many know someone who's tested positive for the virus
- COVID-19 is now highly politicized, even in public radio where Dems dominate
- Most are still at home, but they're beginning to move around, drive, shop
- WFH is a huge issue for public radio today & looks to be a game-changer moving forward
- It's *still* the economy, stupid – the top concern again
- Public radio looks healthy in this study, including music stations
- Streaming on various devices looks solid
- Many are seeking distractions from COVID-19 news coverage

# Key Findings

- When it comes to trust, governors rise to the top of the political heap
- Most are concerned that businesses will open too soon
- A solid majority are resigned to a “new normal” post-COVID-19; many believe the worst is yet to come
- Nearly everyone is “social distancing,” and most wear face masks frequently
- Few activities are considered “not risky;” the safest are shopping at a grocery/pharmacy and visiting a doctor/dentist
- Once again, favorite public radio stations earn “excellent” scores & credit for covering COVID-19 with the right balance
- Many feel a stronger connection to stations since COVID-19
- It’s safe to be fundraising again – a shift from April’s survey



The background is a solid teal color. It is populated with numerous stylized, semi-transparent illustrations of various microorganisms. These include spherical viruses with prominent surface spikes (resembling coronaviruses), smaller spherical particles, and elongated, rod-shaped bacteria. The illustrations are scattered across the frame, with some appearing larger and more detailed than others, creating a sense of depth and a microscopic environment.

# So Now What?



# THIS is the “new normal” - Focus on WFH Messaging

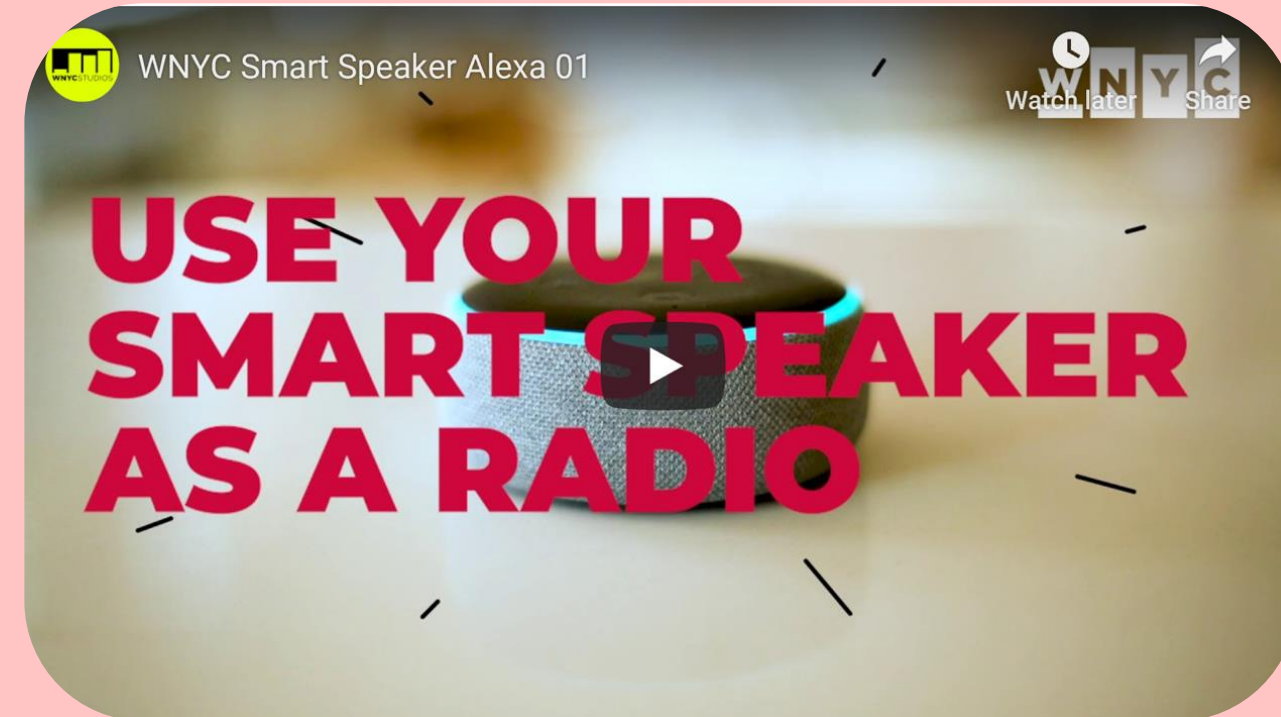


# WFH May Likely Change Your Station





# Consistently Promote Your Streaming Channels/Gadgets





# Stay In Your Lane (Especially If You're A Music Station)

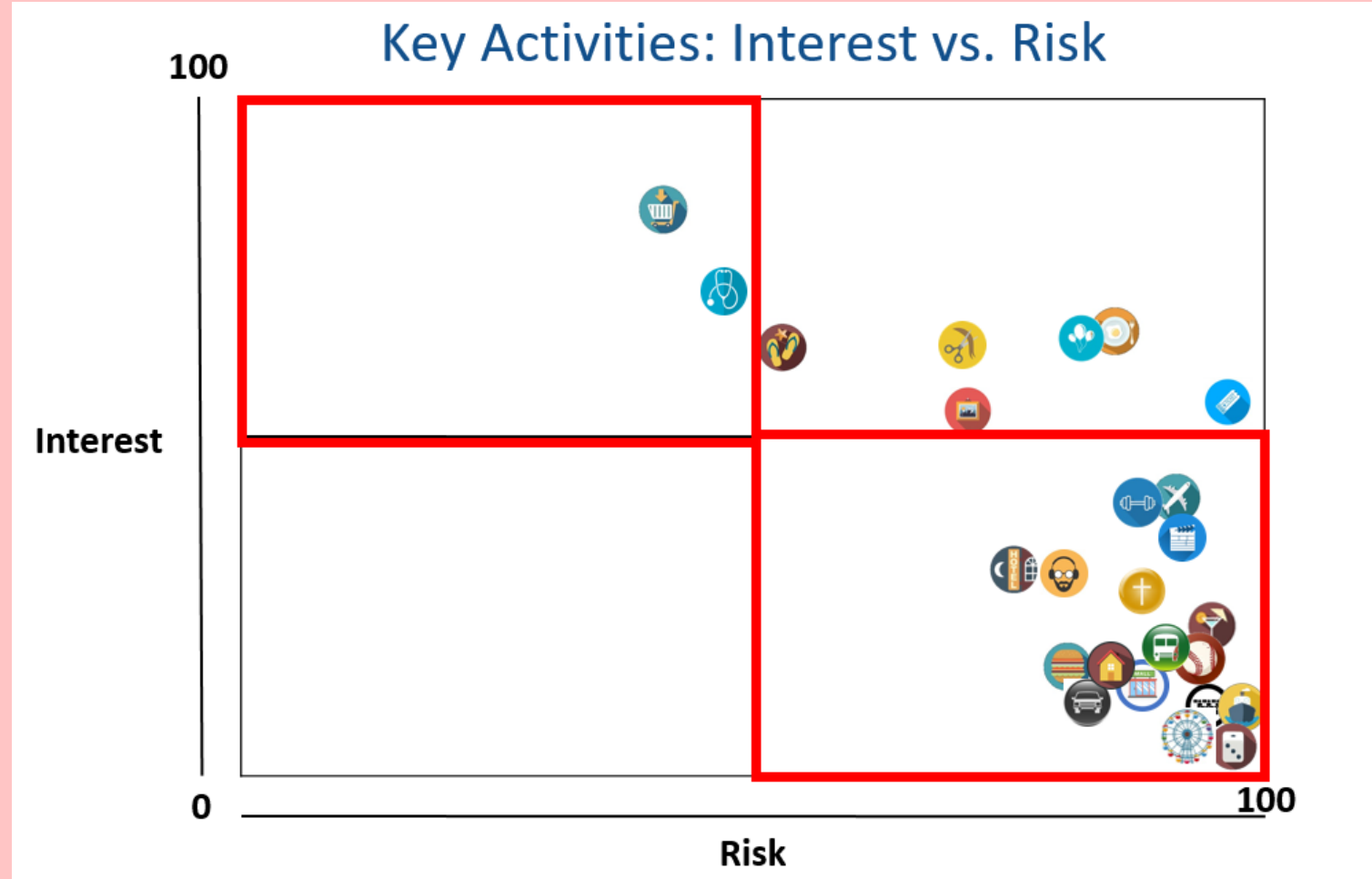




# Humor And Distraction Are More Desirable Now



# Development Can Help Sponsors – Let the Grid Be Your Guide





# COVID-19 Themed Podcasts





# Keep Up The Good Work!



**KQED**  
15 hrs · 🌐

👤 We hope this sea creature drawing tutorial gets your seal of approval. Join Mark Fiore Animated Political Cartoons for his latest episode of Cartooning-in-Place here: <https://bit.ly/36f4nP0>

**CARTOONING-IN-PLACE**  
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# Keep Up The Good Work!

#QUARANTINE  
HAIKUS



WBEZ

17 hrs · 🌐

Looking for a way to say con-GRAD-ulations in the age of COVID-19? We've got just the thing. 💖 🎓



1.

You write a message to your grad



2.

WBEZ makes a card and posts it to Instagram

3.

Your grad receives a notification!



i

WBEZ.ORG

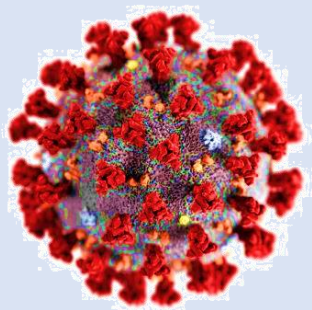
Insta-Grad-Gram: Let WBEZ Help You Send A Virtual Card To Your 2020 Graduate

Coming in June



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# Public Radio's Pathway Through the Pandemic

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