







Public Radio
April 2020

Methodology

- 46 public radio stations in the United States
 - Separate Commercial and Christian Music Radio surveys also fielded concurrently
- NPR included a sample from their listener panel
- N 17,444
 - NPR = 1,029
- News/Talk 28, AAA 8, Classical 7, Other/Jazz 3
- Interview dates: March 31 April 2, 2020 a "snapshot" of this point in time
- Most respondents are members of radio station databases. Some responses were gathered via station websites and/or social media pages.
- This is an unweighted sample.
- This is a web survey and does not represent all public radio listeners or even each station's audience. It is not stratified to the U.S. population.





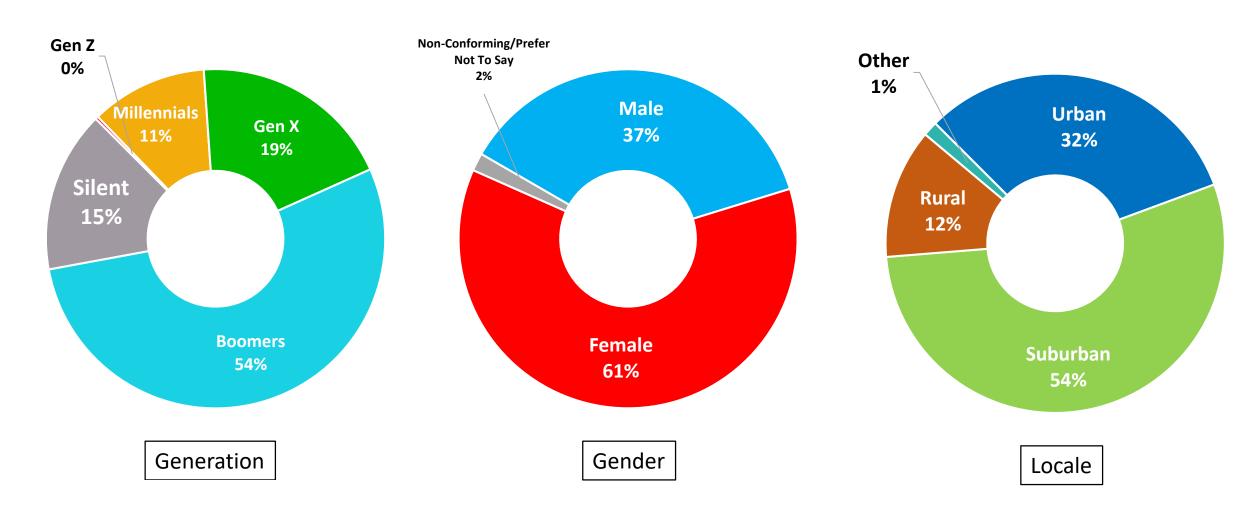


The Sample





Who Participated?









The Radio
Audience's
Mindset During
COVID-19



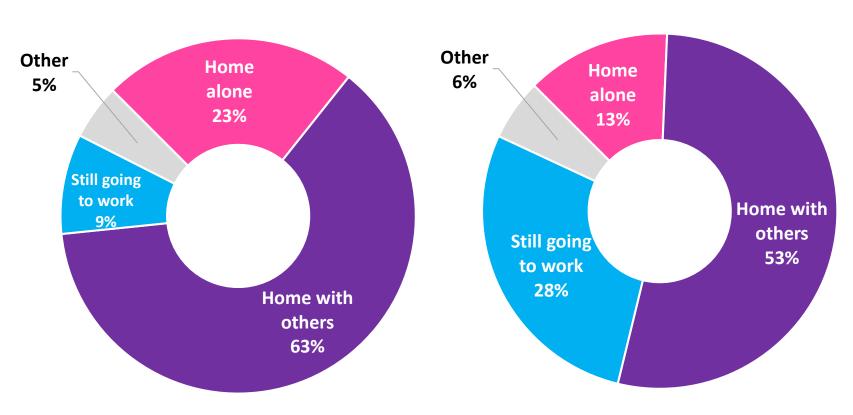


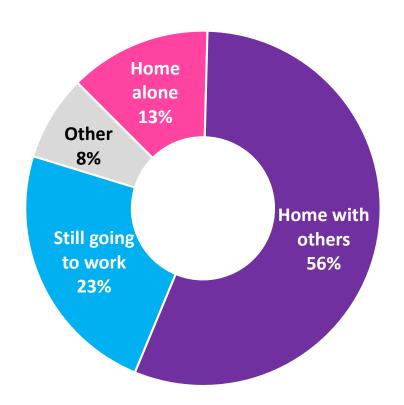
More Than Eight in Ten Public Radio Listeners Are At Home

Public Radio

Commercial Radio

Christian Music Radio







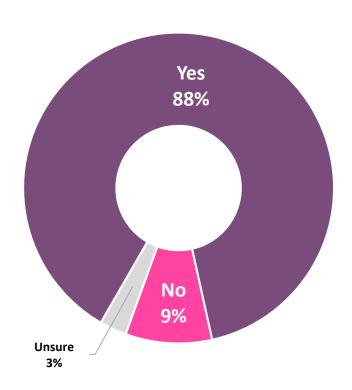


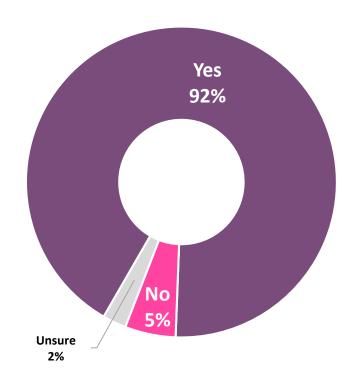
Nearly Nine in Ten Live in a "Stay At Home" State/City

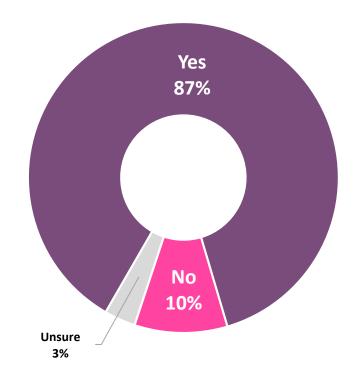
Public Radio

Commercial Radio

Christian Music Radio







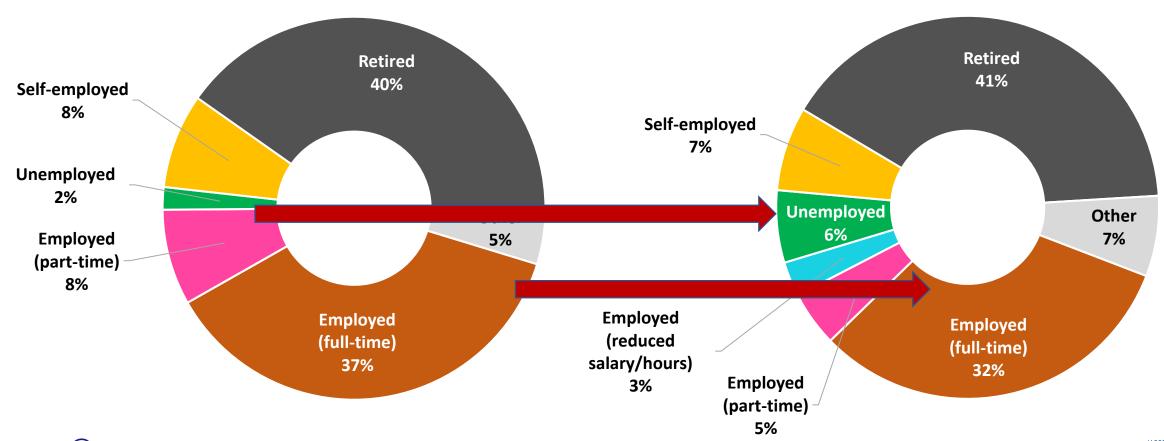




Many Have Lost Their Jobs Since COVID-19 Began, But Many Were Retired To Begin With

BEFORE COVID-19 Outbreak

Current Employment Status



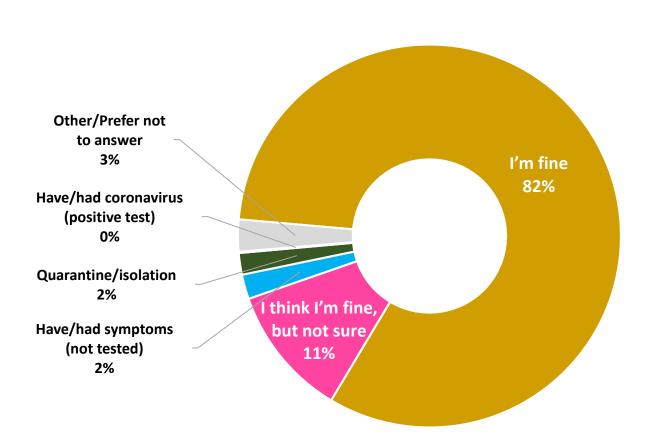


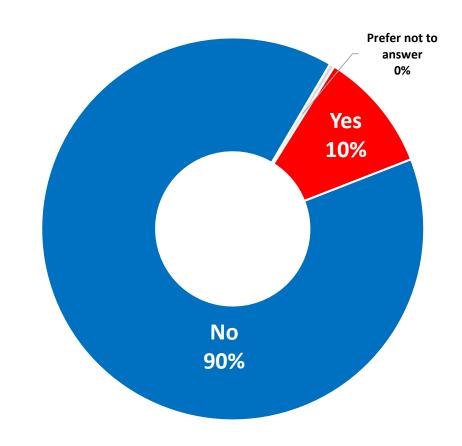


Most Are Feeling Good, But One in Ten Knows Someone Who's Tested Positive For COVID-19

Your Current State of Health

Friends/Family/Co-Workers
Who Tested Positive for COVID-19?

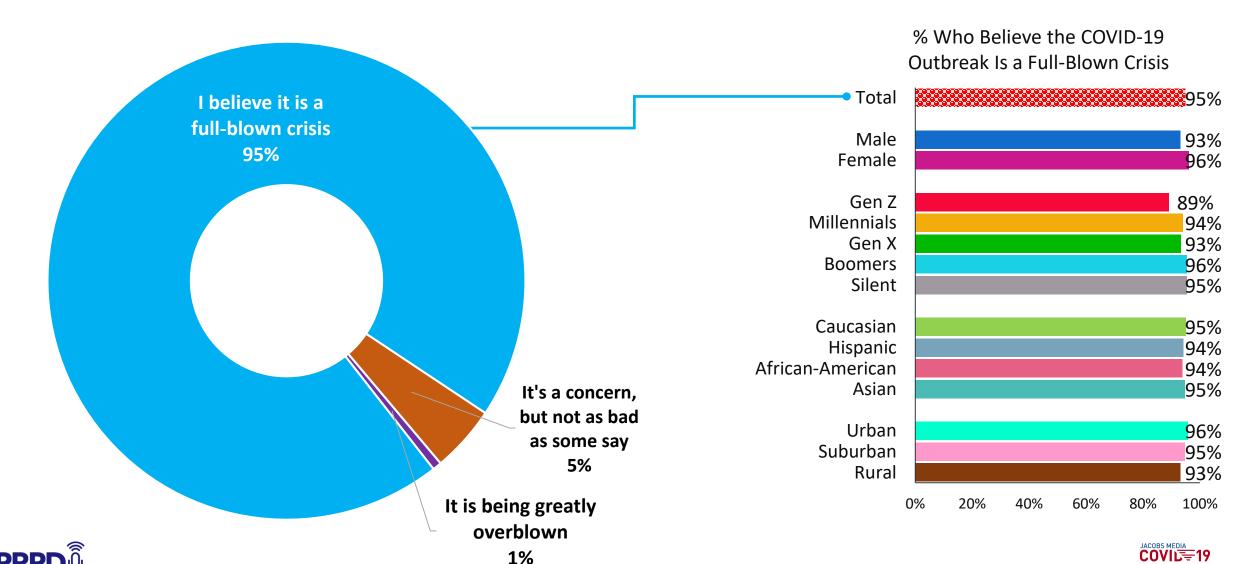






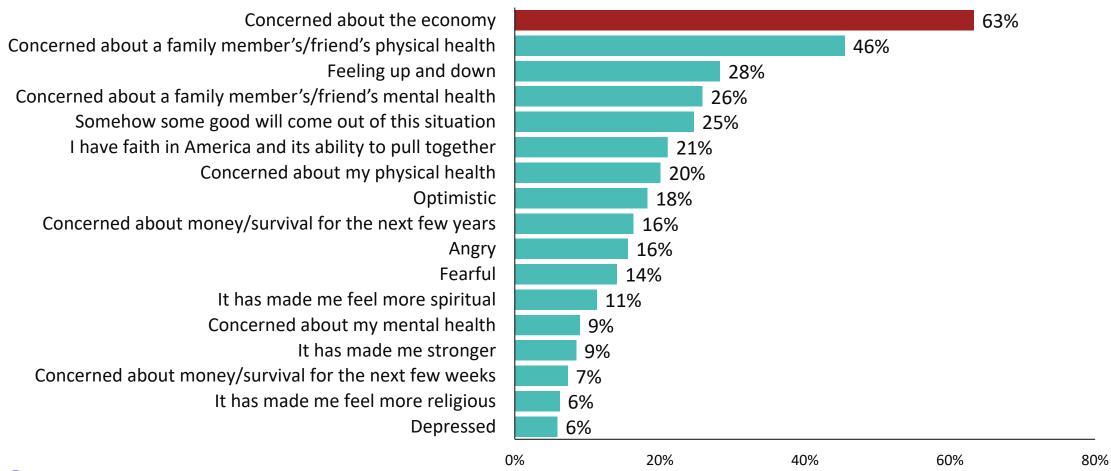


Public Radio Listeners Nearly Universally Say the COVID-19 Outbreak Is a Full-Blown Crisis



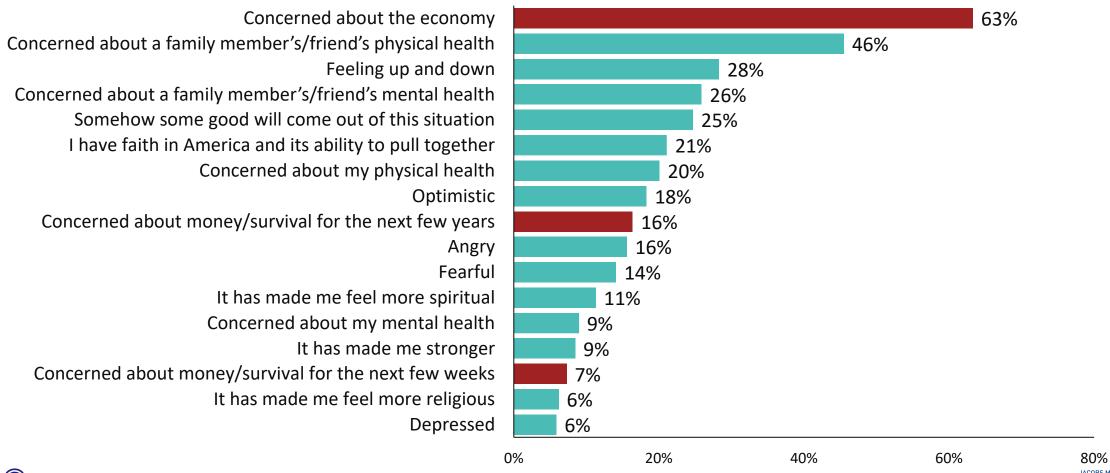
3URVEY

The Economy Tops the List of Concerns





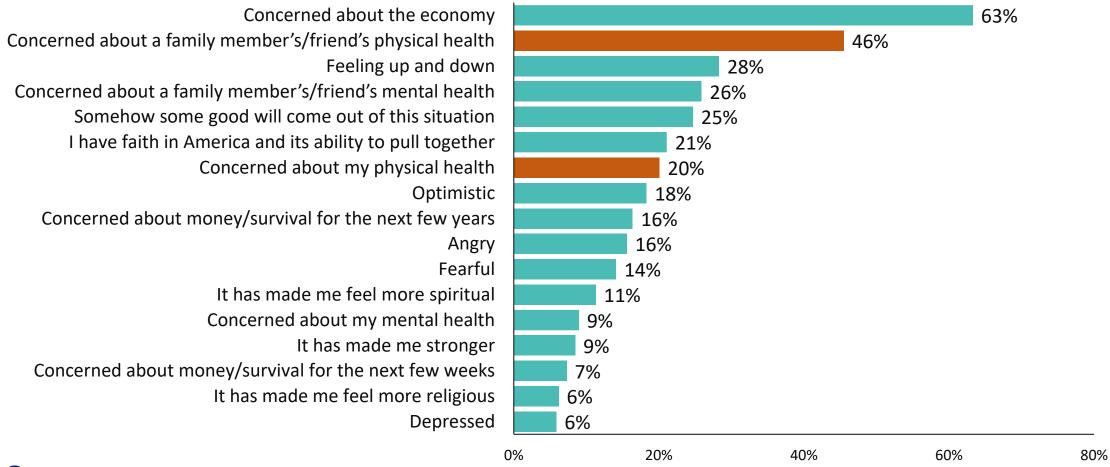
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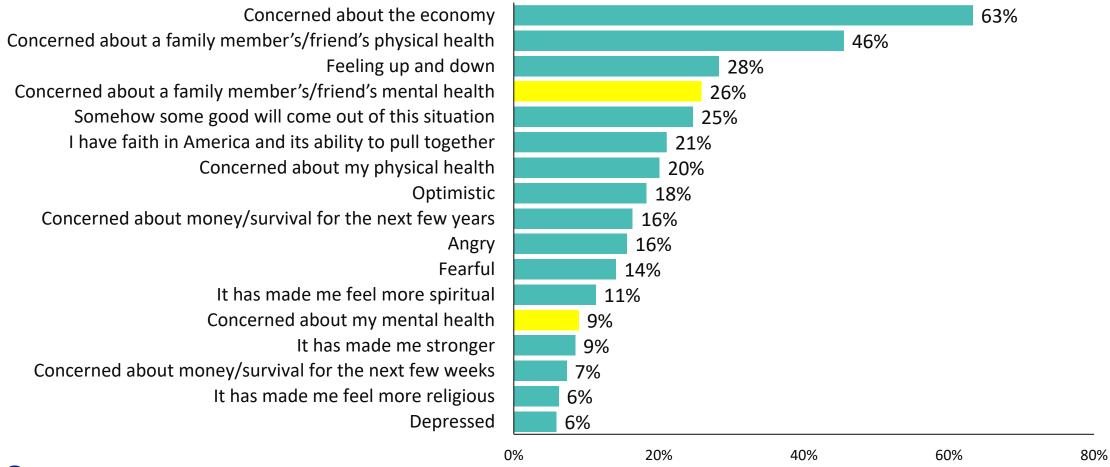
More Than Twice as Many Respondents Are Concerned About Someone Else's Physical Health Over Their Own







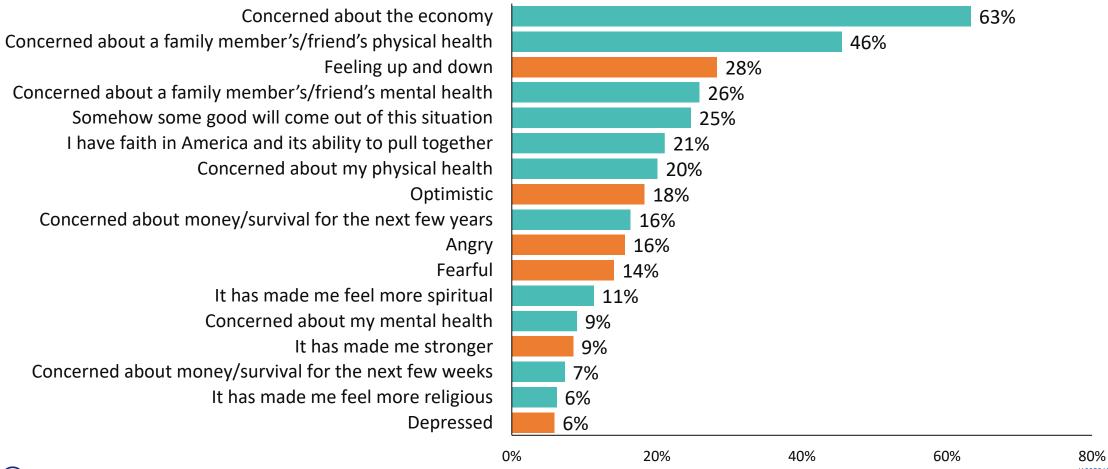
And More Than Twice as Many Are Concerned About Someone Else's Mental Health, Compared to Their Own







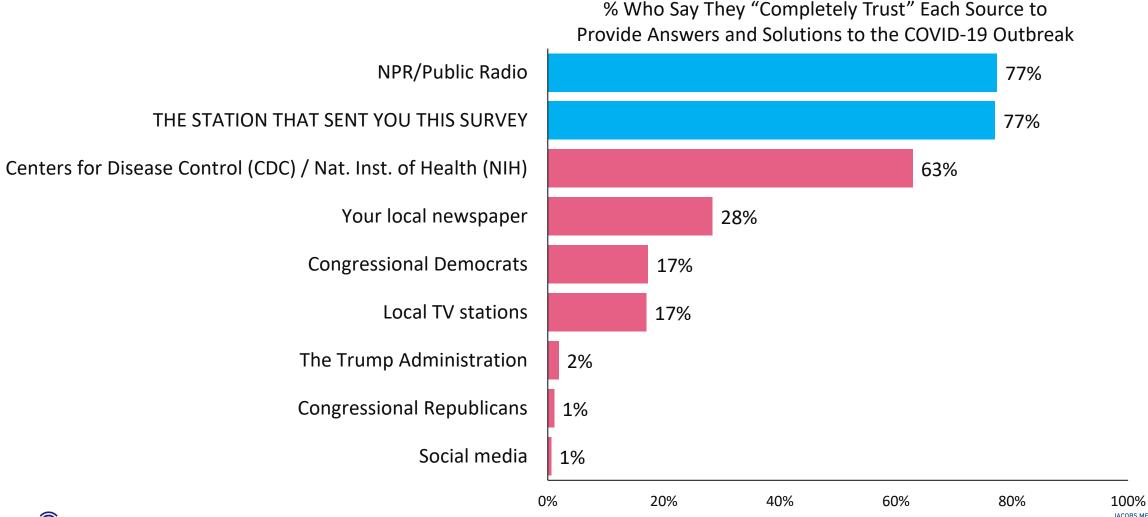
The Leading COVID-19 Emotion? They Are Feeling Up & Down





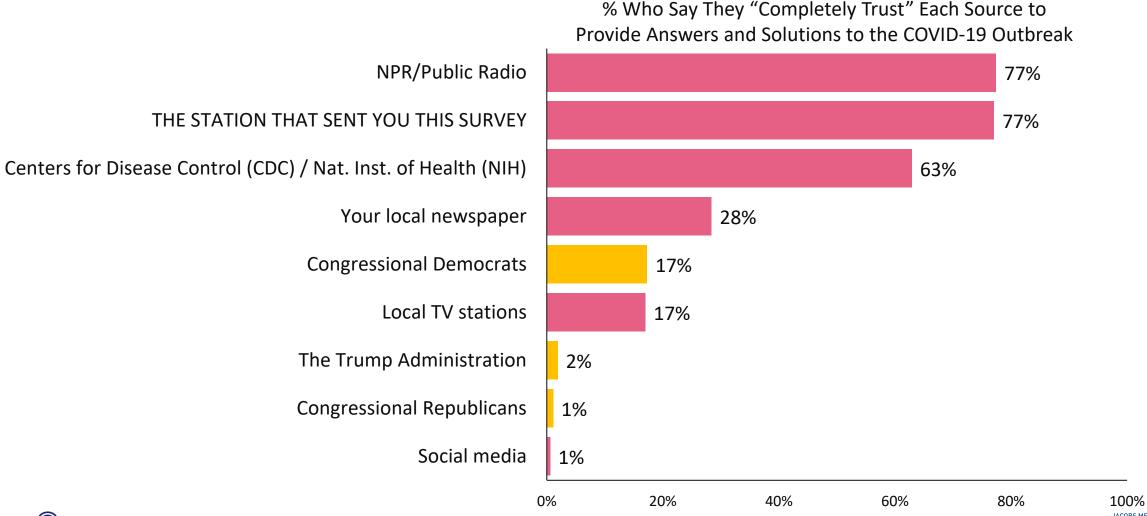


The Most Trust Is Given to NPR & Listeners' Home Stations





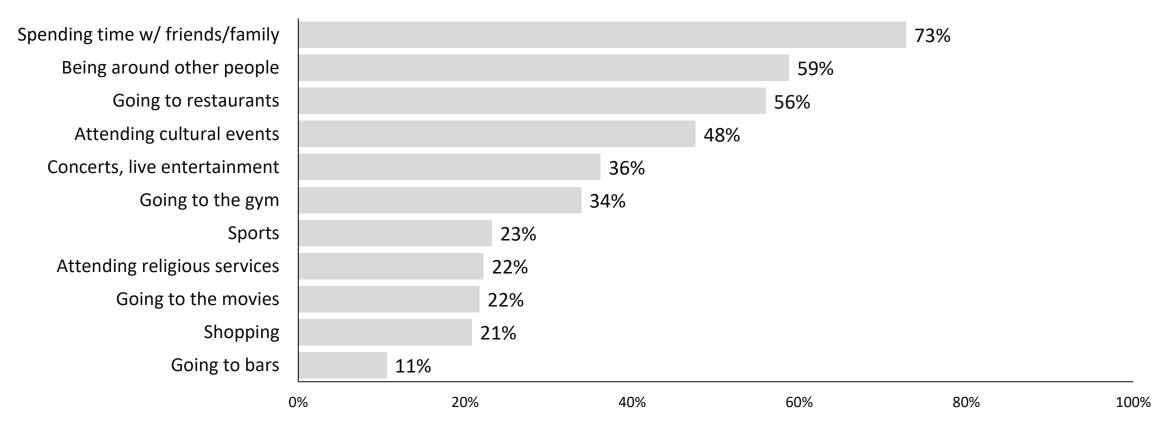
There Are Low Trust Levels For All Politicians, But Democrats Have An Edge Over Republicans and President Trump





Most Miss Spending Time With Friends/Family, Being Around Other People, and Going to Restaurants

Public Radio

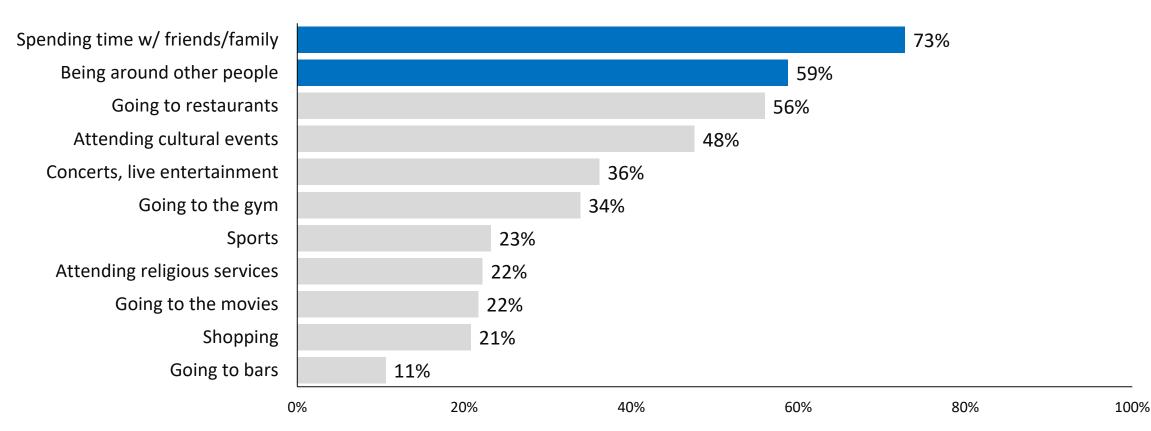






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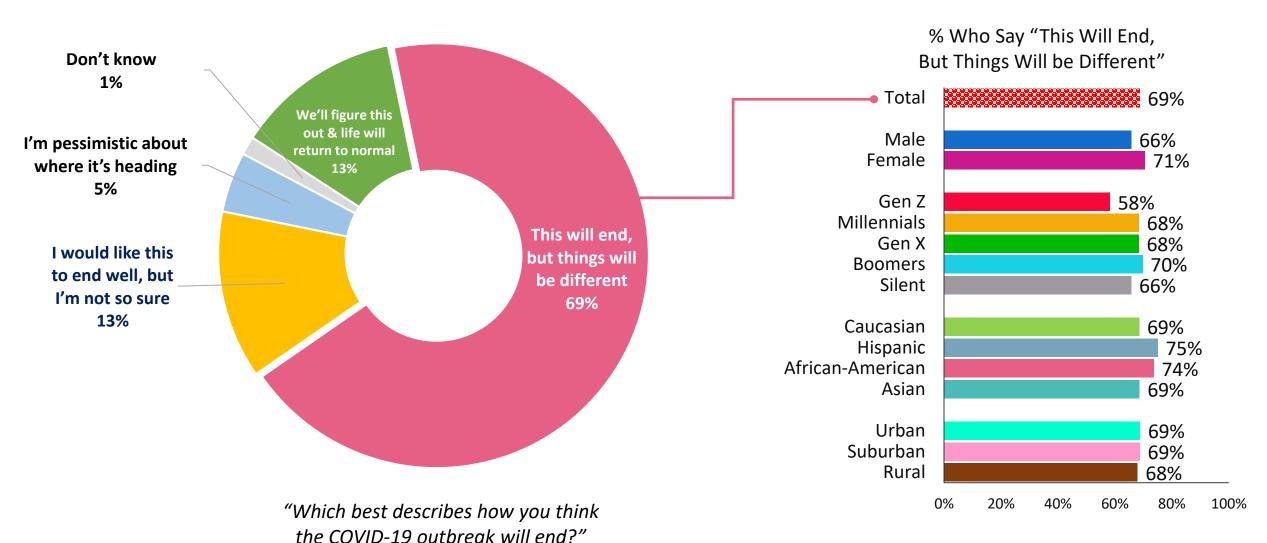








A Majority Feel Things Will Be "Different" When the COVID-19 Crisis Ends









Changes in Media Usage Since COVID-19

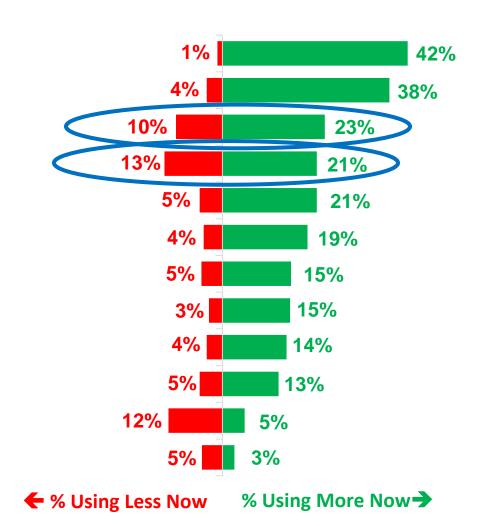


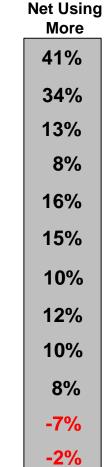


Since COVID-19, Public Radio Listening Is Very Strong

Streaming video services (Netflix, Hulu, etc.) General internet browsing NPR/Public Radio THE STATION THAT SENT YOU THIS SURVEY Social media Cable TV news channels (CNN, Fox News, etc.) Network TV (ABC, NBC, etc.) Local newspaper (physical paper/website) Music streaming services (Spotify, Pandora, etc.) **Podcasts** Other AM/FM radio stations in your city/town

SiriusXM satellite radio

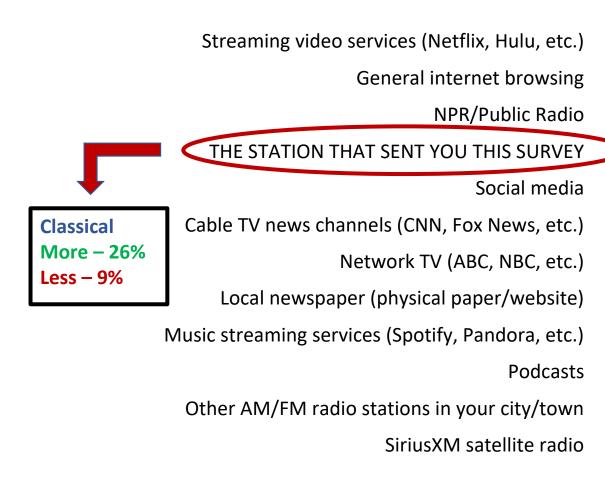


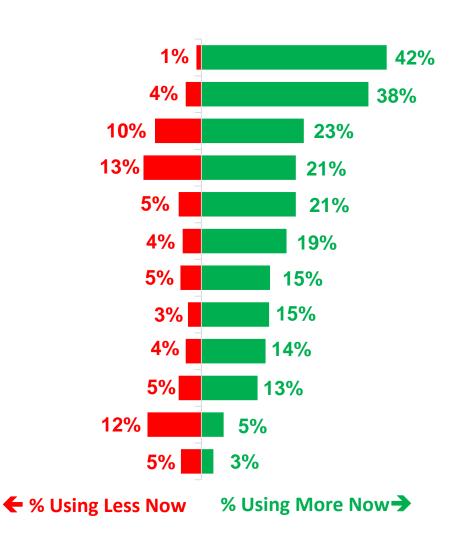






Classical Radio Is Experiencing The Biggest Gains









Net Using More

41%

34%

13%

8%

16%

15%

10%

12%

10%

8%

-7%

-2%



Public Radio And COVID-19



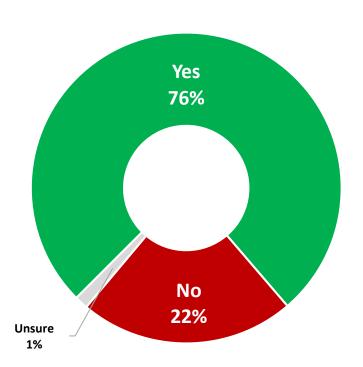


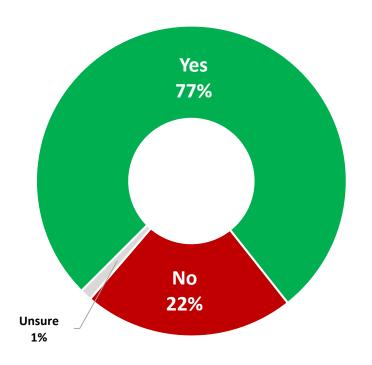
More Than One-Fifth Do NOT Have a Working Radio in Their Homes That They Use

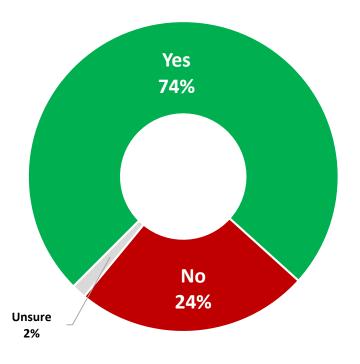


Commercial Radio

Christian Music Radio





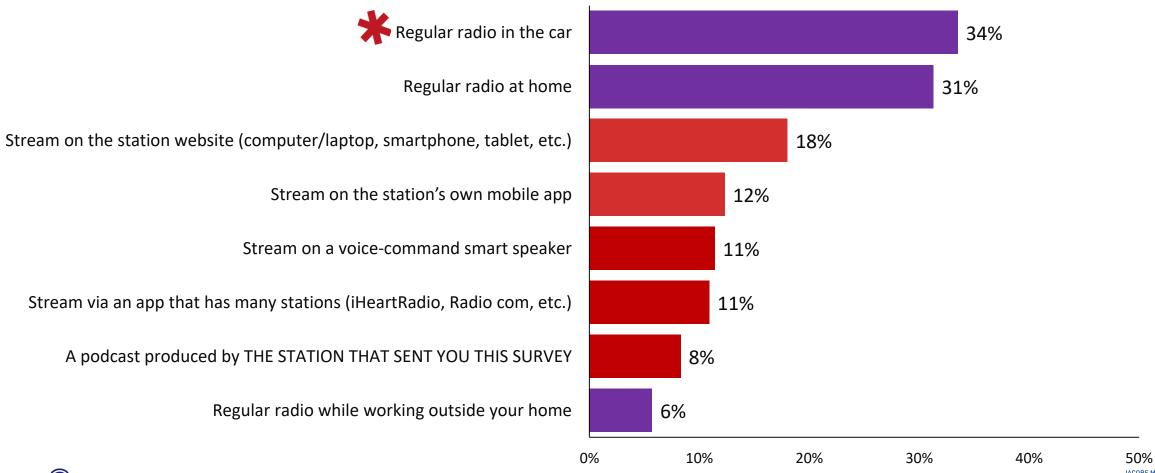






In-Car Listening Leads, But Far Less Than "Normal," While Streaming on Various Devices Is Solid

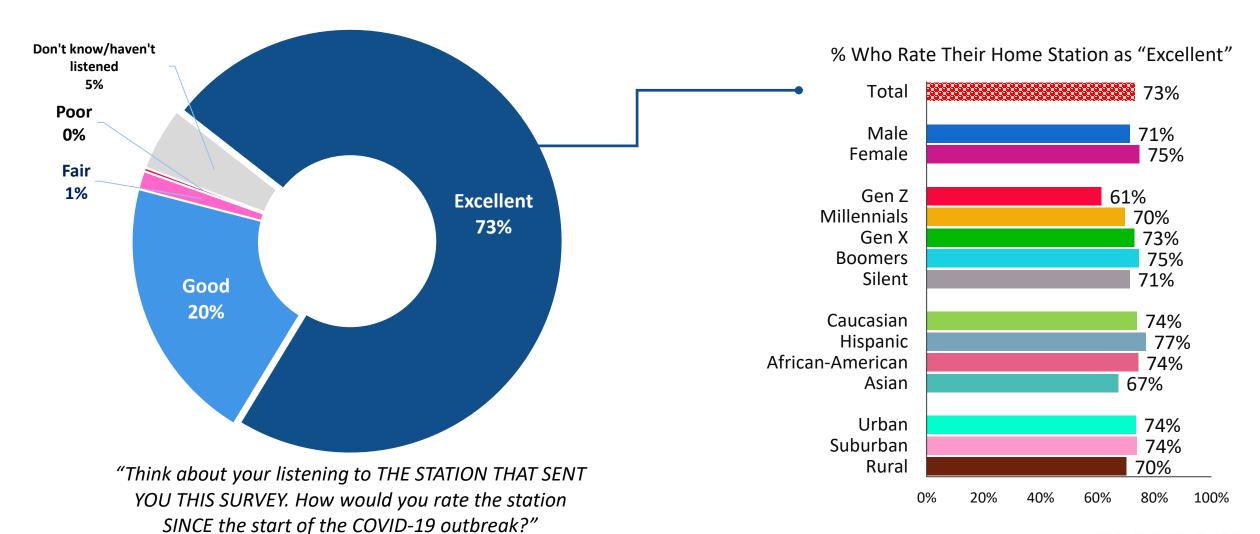
Among Those Currently Listening to Their Home Station, % Using Each Platform "A Lot" to Listen to the Station







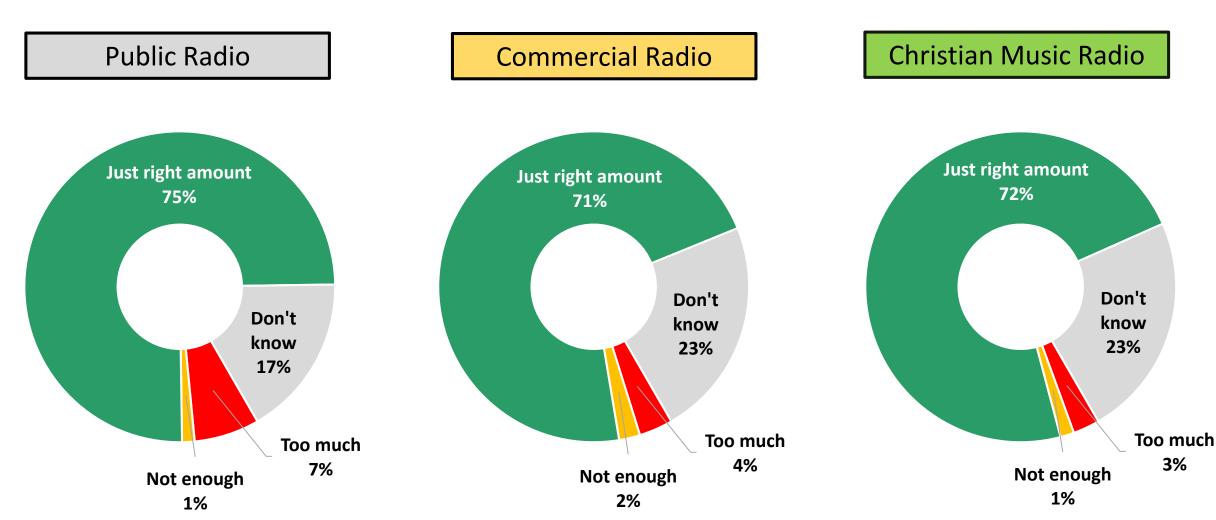
Nearly Three in Four Rate Their Home Station "Excellent" Since the COVID-19 Outbreak







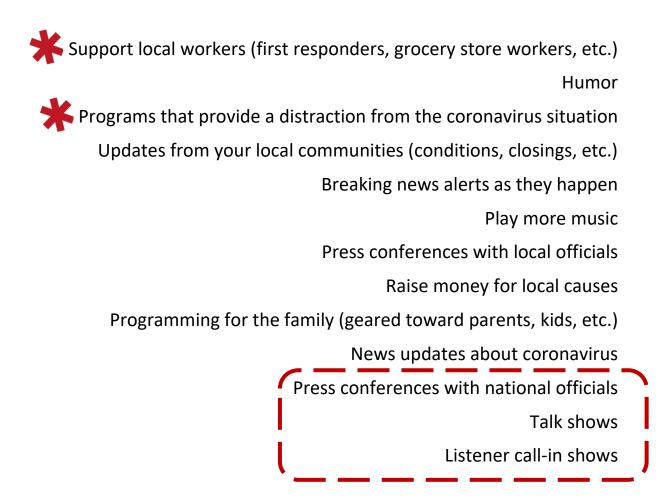
Three in Four Feel Their Home Station Is Paying the Right Amount of Attention to COVID-19

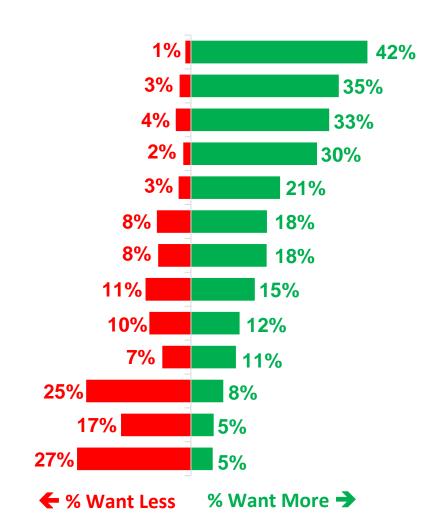


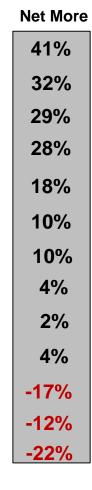




Supporting Local Workers Is the Top Priority For Public Radio Listeners, Followed By Humor, Programming Distractions & Local Updates



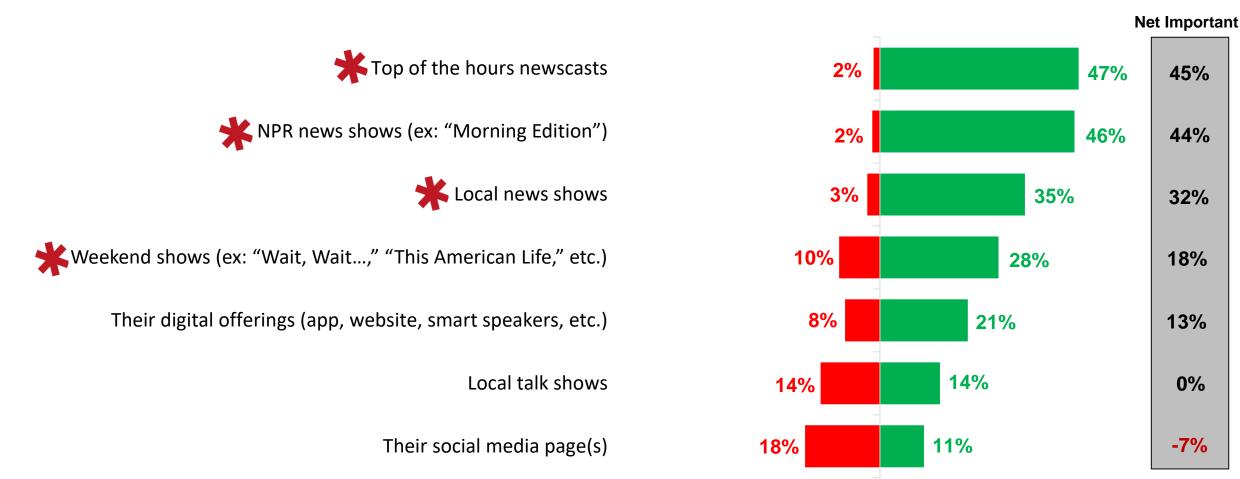








Top of the Hour Newscasts More Important Now, Followed By NPR News, Local News, And Lighter Weekend Programming







% More Important →

4 % Less Important



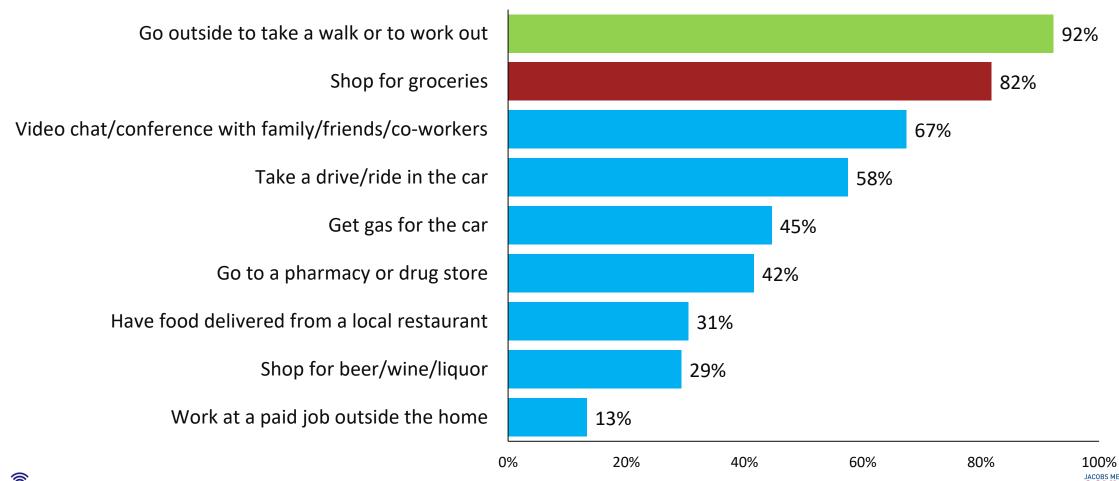
Consumer Buying & Shopping Behavior





In the Coming Week, Nearly All Plan to Get Outside For a Walk/Workout, While More Than Eight in Ten Plan to Grocery Shop

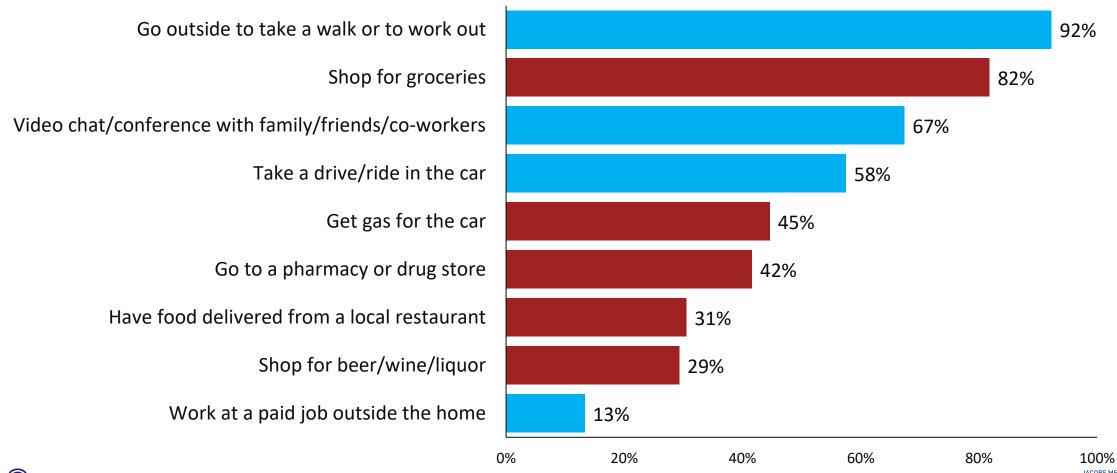
% Who Plan to Do Each in the Next Week or So





In the Coming Week, Many Will Be Shopping At Grocery Stores, Pharmacies, or Gassing Up the Car

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

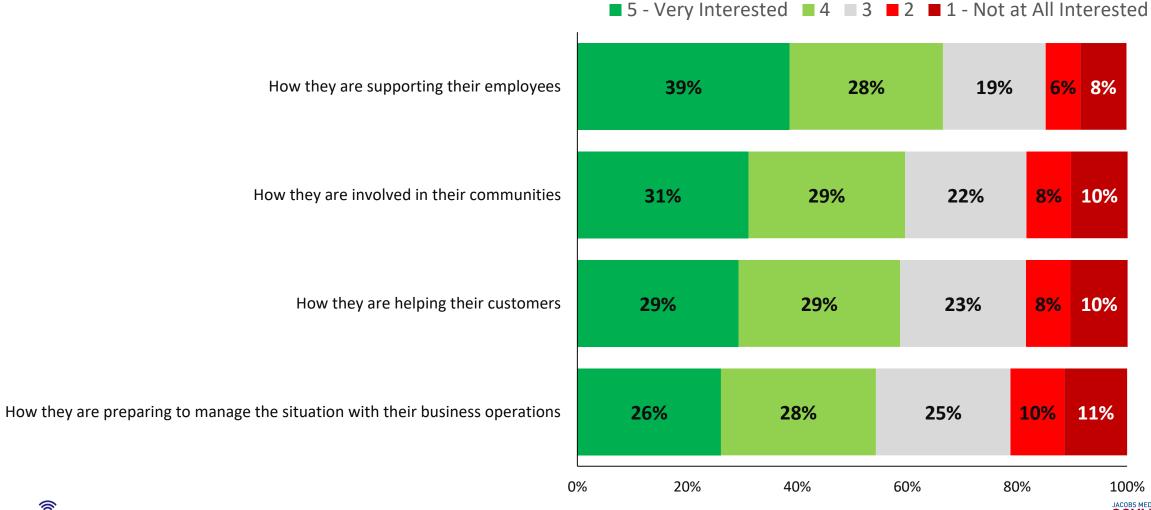








The Strongest Interest is in Hearing Sponsors Support Their Employees, Community Involvement & Customers





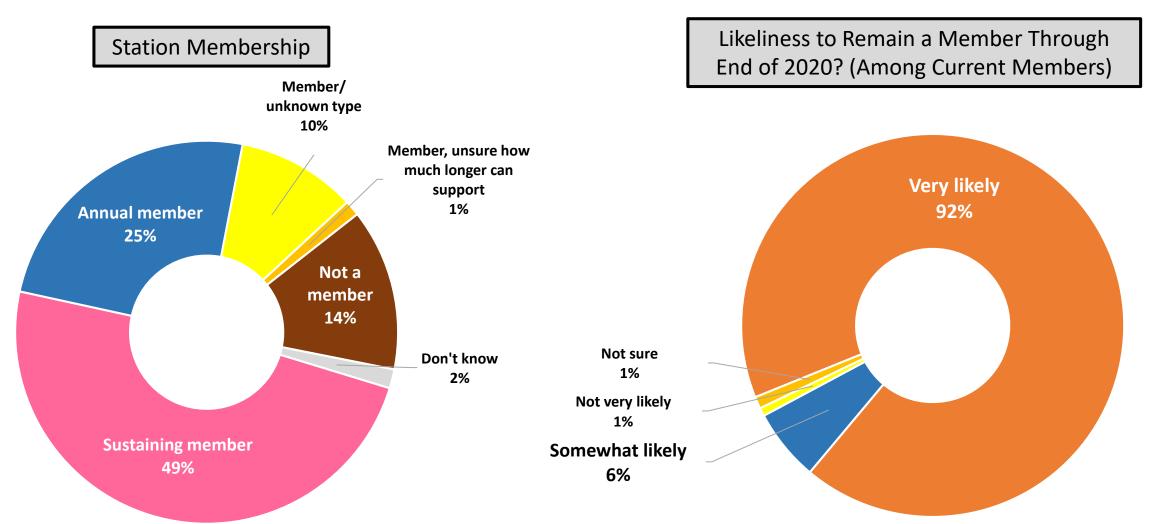


Membership and Fundraising





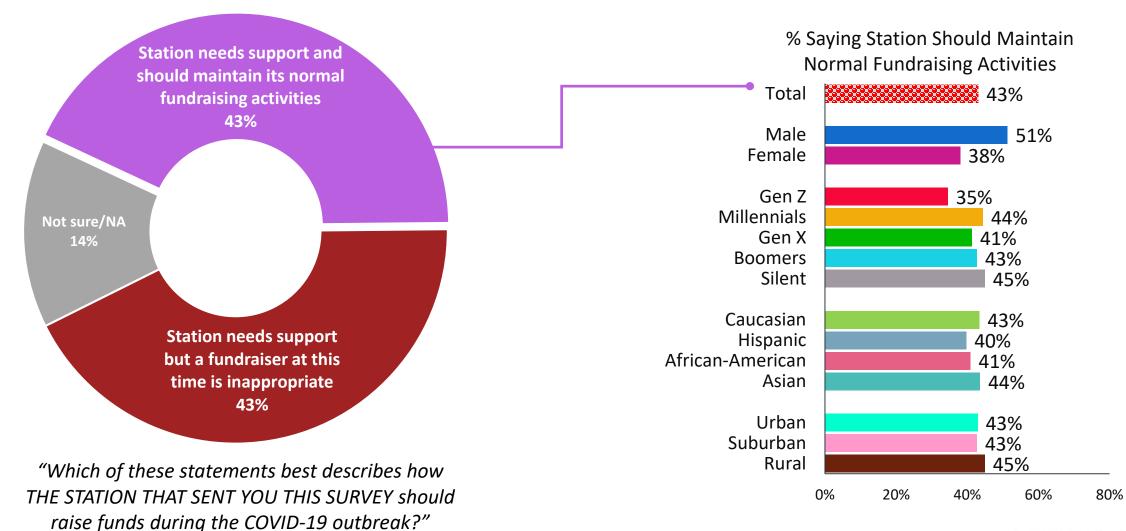
Most Are Sustaining Members, and Plan to Remain Members Through 2020







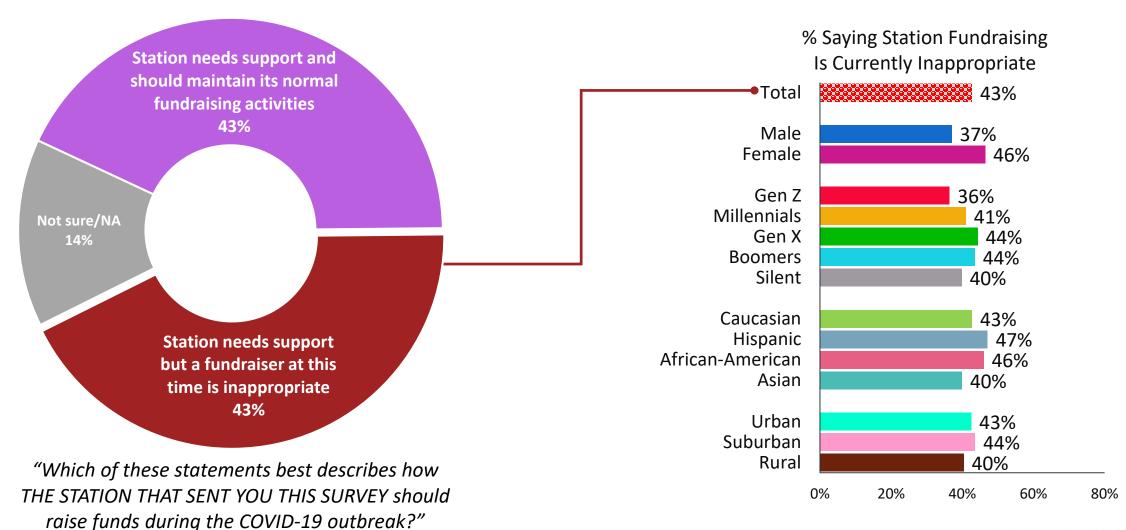
Equal Split on the Issue of Fundraising During COVID-19; A Majority of Men Feel Fundraising Should Continue







Equal Split on the Issue of Fundraising During COVID-19; Women Are More Apt to Say Fundraising Is Inappropriate









Takeaways





Key Findings

- Many audience members are out of their comfort zones physically & mentally
 - Many are in odd locations, situations
 - But many were retired to begin with, so there's less worry about jobs, money issues
 - More than anything else, they're feeling "up & down"
 - Not ideal for a "habit medium" like radio
- This is a full-blown crisis, it will end, but things will be different
- Many are more concerned about the physical/emotional welfare of a friend or family member than themselves
- "It's the economy, stupid," but not as acutely painful as commercial radio
- They are less depressed, angry, and afraid and more apt to be feeling "up & down"
- They mostly miss interactions with others

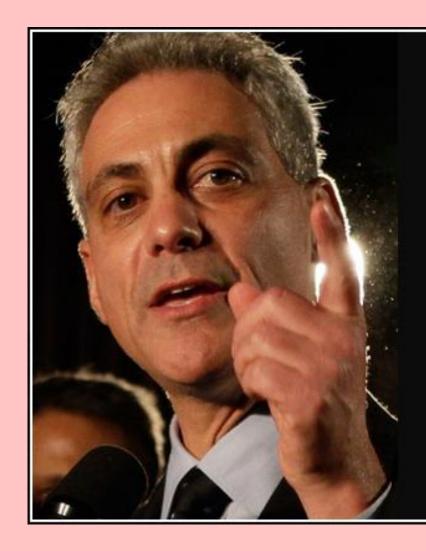




Key Findings

- They don't trust politicians, but they do trust NPR & their local public radio station
- Public radio stations earn "excellent" scores & kudos for having the right balance
- They are consuming lots of video, but public radio looks very solid, despite disappearing radios at home
- They're not interested in deep COVID-19 coverage, and many want to be distracted.
- Classical looks to have momentum; they also value "lighter" weekend shows
- Millennials are likelier to listen to radio on computers, phones, smart speakers
- They're most interested in how sponsors are supporting employees/communities
- Despite the pandemic, they are exercising & spending money on groceries, etc.
- There's a split about the appropriateness of fundraising in this environment "stakeholders" will need to check their station's local data





You never let a serious crisis go to waste. And what I mean by that: it's an opportunity to do things you think you could not do before.

— Rahm Emanuel —

AZ QUOTES





Any Brand Can Emerge In a Crisis







Re-Examine Your Model









Re-Examine Your Messaging







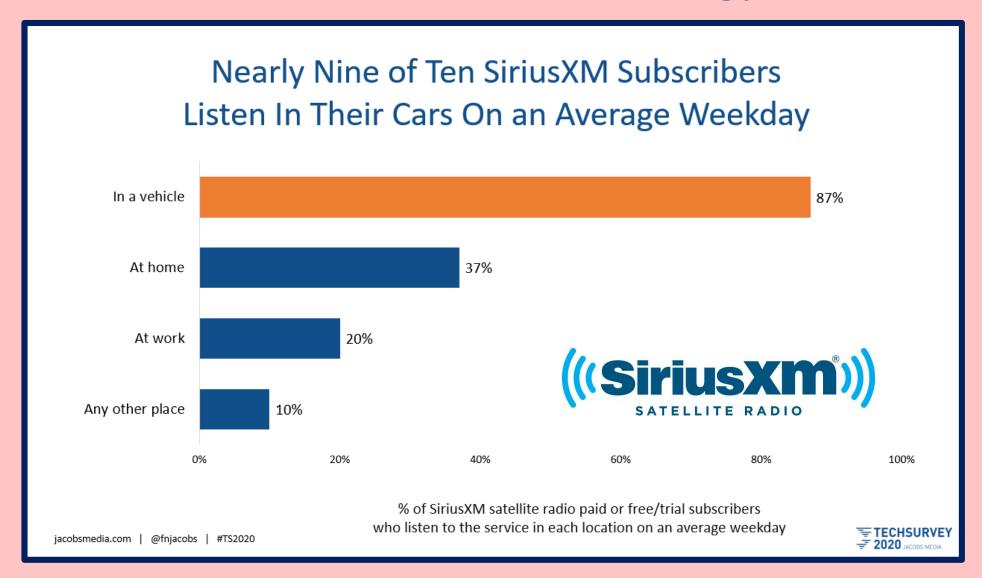
Shop for cars 100% online from the safety and co with touchless delivery to keep our customers and

CUBS CANCELLED
WHITE SOX CANCELLED
BLACKHAWKS CANCELLED
BULLS CANCELLED
MARCH MADNESS CANCELLED
NOT CANCELLED





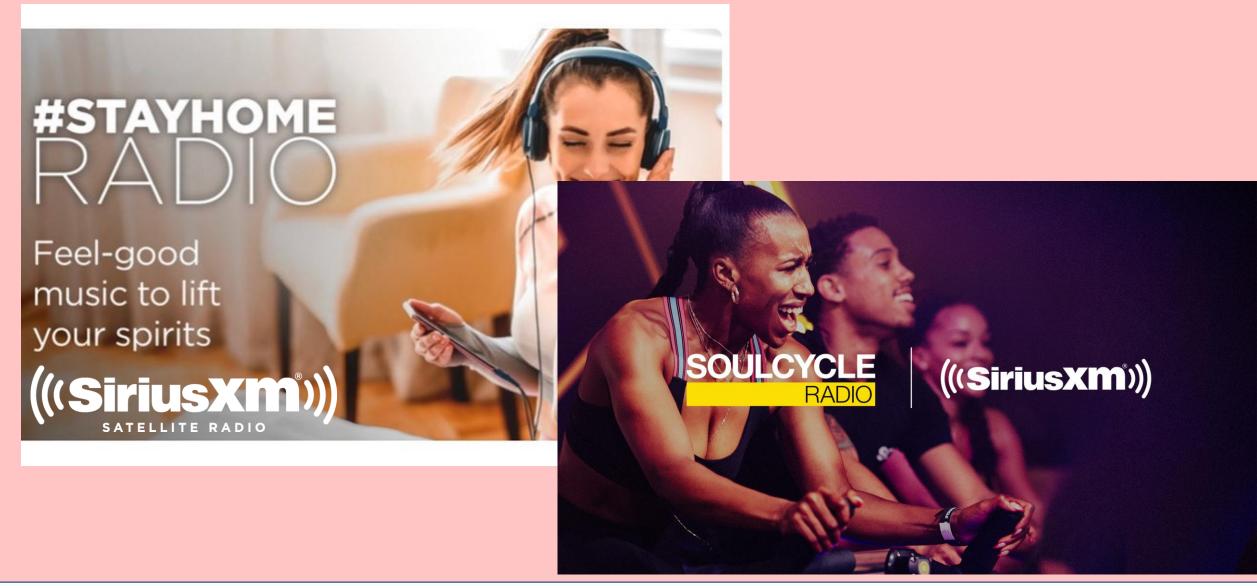
Shift Your Location Strategy







Shift Your Location Strategy







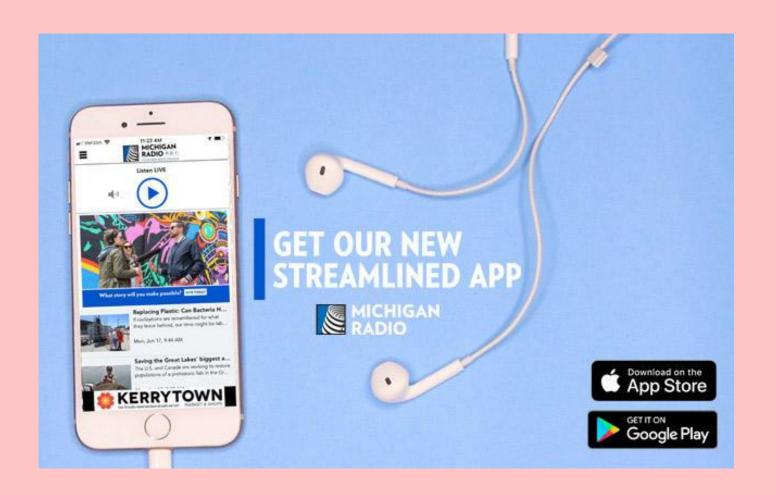
Promote Your Streaming Channels/Gadgets

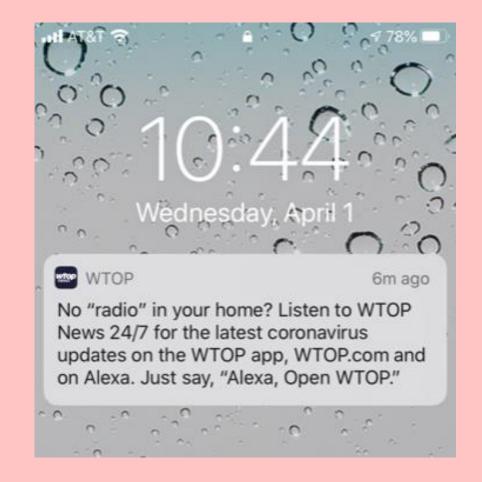






Promote Your Streaming Channels/Gadgets









Promote Your Streaming Channels/Gadgets









Stay At Home = A Fashion Statement?



Good morning. 3:48am in the basement studio, and here we go.



3:53 AM · Mar 23, 2020 · Twitter for iPhone

98 Retweets 6.3K Likes







"Stay At Home" = The New Intimacy







"Stay At Home" = The New Intimacy

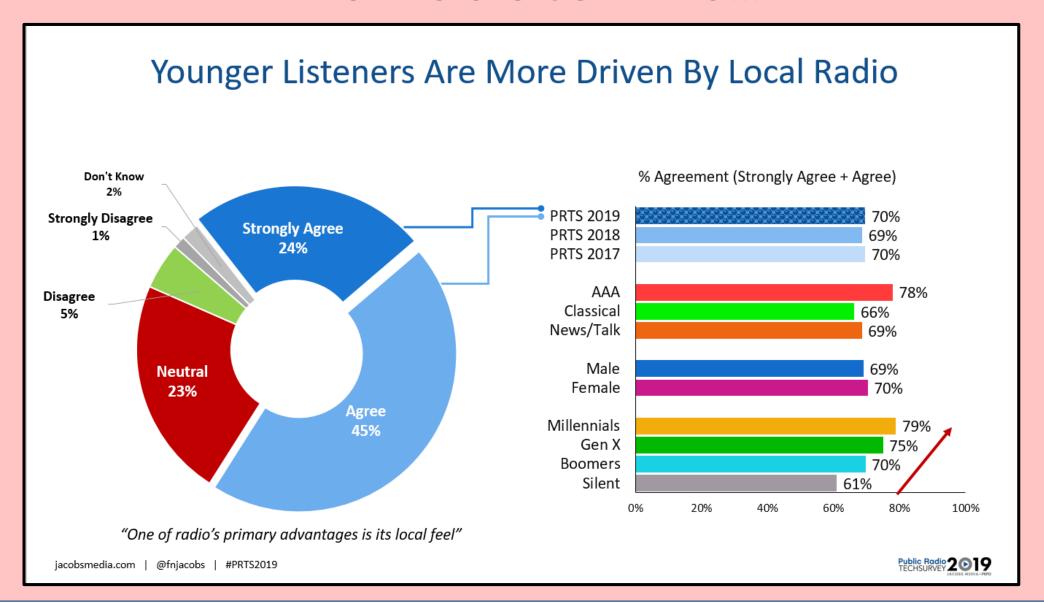
Checking In With... Steve Earle







Even Before COVID-19...







Support Your Local "Essential Workers"







Celebrate Local



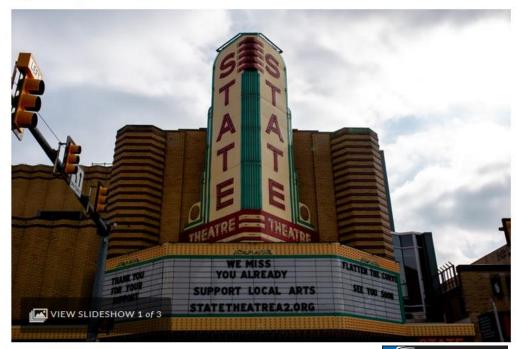
Michiganders at home: Show or tell us something good

By MICHIGAN RADIO NEWSROOM . 21 HOURS AGO









The State Theatre in Ann Arbor, MI

KATIE RAYMOND / MICHIGAN RADIO







Support Local Businesses











Support Local Businesses

Musician's Resource Guide



Hart Van Danburg/CPR

Brent Cowles live in Dime Deriver's Studio 101 with Indie 102.3's Alisha Sweeney on Friday Nov. 9 2019.

Whether you're just getting started in the music industry or already a full-time musician, Indie 102.3 is connecting you with everything you need to know about how to make music in Colorado.

Resources during the time of coronavirus

Colorado Business Committee for the Arts



COVIL 19 -3URVEY2



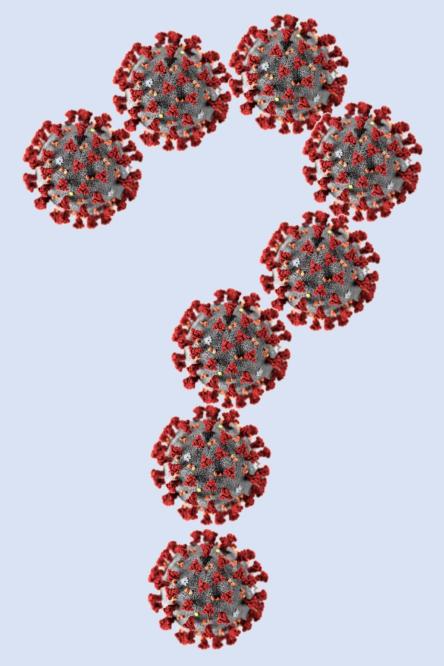


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