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.
Who Participated?

Generation:
- Gen Z: 0%
- Millennials: 11%
- Gen X: 19%
- Boomers: 54%
- Silent: 15%

Gender:
- Male: 37%
- Female: 61%
- Non-Conforming/Prefer Not To Say: 2%

Locale:
- Urban: 32%
- Suburban: 54%
- Rural: 12%
- Other: 1%
The Radio Audience’s Mindset During COVID-19
More Than Eight in Ten Public Radio Listeners Are At Home

Public Radio

- Home alone: 23%
- Home with others: 63%
- Other: 5%
- Still going to work: 9%

Commercial Radio

- Home alone: 13%
- Home with others: 53%
- Still going to work: 28%
- Other: 6%

Christian Music Radio

- Home alone: 13%
- Home with others: 56%
- Still going to work: 23%
- Other: 8%
Nearly Nine in Ten Live in a “Stay At Home” State/City

- **Public Radio**
  - Yes: 88%
  - No: 9%
  - Unsure: 3%

- **Commercial Radio**
  - Yes: 92%
  - No: 5%
  - Unsure: 2%

- **Christian Music Radio**
  - Yes: 87%
  - No: 10%
  - Unsure: 3%
Many Have Lost Their Jobs Since COVID-19 Began, But Many Were Retired To Begin With

**BEFORE COVID-19 Outbreak**

- Employed (full-time) 37%
- Employed (part-time) 8%
- Unemployed 2%
- Self-employed 8%
- Retired 40%
- Other 7%

**Current Employment Status**

- Employed (full-time) 32%
- Employed (part-time) 5%
- Employed (reduced salary/hours) 3%
- Self-employed 7%
- Unemployed 6%
- Retired 41%
- Other 7%
Most Are Feeling Good, But One in Ten Knows Someone Who’s Tested Positive For COVID-19

**Your Current State of Health**

- I’m fine: 82%
- I think I’m fine, but not sure: 11%
- Have/had symptoms (not tested): 2%
- Quarantine/isolation: 2%
- Other/Prefer not to answer: 3%

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

- Yes: 10%
- No: 90%
- Prefer not to answer: 0%
Public Radio Listeners Nearly Universally Say the COVID-19 Outbreak Is a Full-Blown Crisis

I believe it is a full-blown crisis 95%
It's a concern, but not as bad as some say 5%
It is being greatly overblown 1%

% Who Believe the COVID-19 Outbreak Is a Full-Blown Crisis

- Total: 95%
- Male: 93%
- Female: 96%
- Gen Z: 89%
- Millennials: 94%
- Gen X: 93%
- Boomers: 96%
- Silent: 95%
- Caucasian: 95%
- Hispanic: 94%
- African-American: 94%
- Asian: 95%
- Urban: 96%
- Suburban: 95%
- Rural: 93%
The Economy Tops the List of Concerns

% Who Say Each Word/Phrase Currently Describes Them “Very Well”

- Concerned about the economy: 63%
- Concerned about a family member’s/friend’s physical health: 46%
- Feeling up and down: 28%
- Concerned about a family member’s/friend’s mental health: 26%
- Somehow some good will come out of this situation: 25%
- I have faith in America and its ability to pull together: 21%
- Concerned about my physical health: 20%
- Optimistic: 18%
- Concerned about money/survival for the next few years: 16%
- Angry: 16%
- Fearful: 14%
- It has made me feel more spiritual: 11%
- Concerned about my mental health: 9%
- It has made me stronger: 9%
- Concerned about money/survival for the next few weeks: 7%
- It has made me feel more religious: 6%
- Depressed: 6%
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% Who Say Each Word/Phrase Currently Describes Them “Very Well”

- Concerned about the economy: 63%
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- It has made me feel more religious: 6%
- Depressed: 6%
More Than Twice as Many Respondents Are Concerned About Someone Else’s Physical Health Over Their Own

- Concerned about the economy: 63%
- Concerned about a family member’s/friend’s physical health: 46%
- Feeling up and down: 28%
- Concerned about a family member’s/friend’s mental health: 26%
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- Concerned about my mental health: 9%
- It has made me stronger: 9%
- Concerned about money/survival for the next few weeks: 7%
- It has made me feel more religious: 6%
- Depressed: 6%
And More Than Twice as Many Are Concerned About Someone Else’s Mental Health, Compared to Their Own

% Who Say Each Word/Phrase Currently Describes Them “Very Well”

- Concerned about the economy: 63%
- Concerned about a family member’s/friend’s physical health: 46%
- Feeling up and down: 28%
- Concerned about a family member’s/friend’s mental health: 26%
- Somehow some good will come out of this situation: 25%
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- Concerned about my physical health: 20%
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- Concerned about my mental health: 9%
- It has made me stronger: 9%
- Concerned about money/survival for the next few weeks: 7%
- It has made me feel more religious: 6%
- Depressed: 6%
The Leading COVID-19 Emotion? They Are Feeling Up & Down

% Who Say Each Word/Phrase Currently Describes Them “Very Well”

- Concerned about the economy: 63%
- Concerned about a family member’s/friend’s physical health: 46%
- Feeling up and down: 28%
- Concerned about a family member’s/friend’s mental health: 26%
- Somehow some good will come out of this situation: 25%
- I have faith in America and its ability to pull together: 21%
- Concerned about my physical health: 20%
- Optimistic: 18%
- Concerned about money/survival for the next few years: 16%
- Angry: 16%
- Fearful: 14%
- It has made me feel more spiritual: 11%
- Concerned about my mental health: 9%
- It has made me stronger: 9%
- Concerned about money/survival for the next few weeks: 7%
- It has made me feel more religious: 6%
- Depressed: 6%
The Most Trust Is Given to NPR & Listeners’ Home Stations

% Who Say They “Completely Trust” Each Source to Provide Answers and Solutions to the COVID-19 Outbreak

- NPR/Public Radio: 77%
- The Station That Sent You This Survey: 77%
- Centers for Disease Control (CDC) / Nat. Inst. of Health (NIH): 63%
- Your local newspaper: 28%
- Congressional Democrats: 17%
- Local TV stations: 17%
- The Trump Administration: 2%
- Congressional Republicans: 1%
- Social media: 1%
There Are Low Trust Levels For All Politicians, But Democrats Have An Edge Over Republicans and President Trump

% Who Say They “Completely Trust” Each Source to Provide Answers and Solutions to the COVID-19 Outbreak

- NPR/Public Radio: 77%
- THE STATION THAT SENT YOU THIS SURVEY: 77%
- Centers for Disease Control (CDC) / Nat. Inst. of Health (NIH): 63%
- Your local newspaper: 28%
- Congressional Democrats: 17%
- Local TV stations: 17%
- The Trump Administration: 2%
- Congressional Republicans: 1%
- Social media: 1%
Most Miss Spending Time With Friends/Family, Being Around Other People, and Going to Restaurants

“How much, if at all, do you miss the following activities due to the COVID-19 outbreak?”

- Spending time w/ friends/family: 73%
- Being around other people: 59%
- Going to restaurants: 56%
- Attending cultural events: 48%
- Concerts, live entertainment: 36%
- Going to the gym: 34%
- Sports: 23%
- Attending religious services: 22%
- Going to the movies: 22%
- Shopping: 21%
- Going to bars: 11%
Most Miss Spending Time With Friends/Family, Being Around Other People, and Going to Restaurants

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- Spending time w/ friends/family: 73%
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- Going to restaurants: 56%
- Attending cultural events: 48%
- Concerts, live entertainment: 36%
- Going to the gym: 34%
- Sports: 23%
- Attending religious services: 22%
- Going to the movies: 22%
- Shopping: 21%
- Going to bars: 11%

Public Radio
A Majority Feel Things Will Be “Different” When the COVID-19 Crisis Ends

“What best describes how you think the COVID-19 outbreak will end?”

- 69%: This will end, but things will be different
- 13%: We’ll figure this out & life will return to normal
- 1%: Don’t know
- 5%: I’m pessimistic about where it’s heading
- 13%: I would like this to end well, but I’m not so sure

% Who Say “This Will End, But Things Will be Different”

- Total: 69%
- Male: 66%
- Female: 71%
- Gen Z: 58%
- Millennials: 68%
- Gen X: 68%
- Boomers: 70%
- Silent: 66%
- Caucasian: 69%
- Hispanic: 75%
- African-American: 74%
- Asian: 69%
- Urban: 69%
- Suburban: 69%
- Rural: 68%
Changes in Media Usage Since COVID-19
Since COVID-19, Public Radio Listening Is Very Strong

As the COVID-19 outbreak has unfolded, how has your use of the following media changed, if at all?

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

% Using Less Now  % Using More Now

Streaming video services: 4% 42%
General internet browsing: 4% 38%
NPR/Public Radio: 10% 23%
THE STATION THAT SENT YOU THIS SURVEY: 13% 21%
Social media: 5% 21%
Cable TV news channels: 4% 19%
Network TV: 5% 15%
Local newspaper: 3% 15%
Music streaming services: 4% 14%
Podcasts: 5% 13%
Other AM/FM radio stations: 12% 5%
SiriusXM satellite radio: 5% 3%
Classical Radio Is Experiencing The Biggest Gains

Streaming video services (Netflix, Hulu, etc.)
General internet browsing
NPR/Public Radio
Podcasts
Music streaming services (Spotify, Pandora, etc.)
Network TV (ABC, NBC, etc.)
Cable TV news channels (CNN, Fox News, etc.)
Local newspaper (physical paper/website)
Social media
As the COVID-19 outbreak has unfolded, how has your use of the following media changed, if at all?

Classical
More – 26%
Less – 9%

Streaming video services (Netflix, Hulu, etc.)
General internet browsing
NPR/Public Radio
Podcasts
Music streaming services (Spotify, Pandora, etc.)
Network TV (ABC, NBC, etc.)
Cable TV news channels (CNN, Fox News, etc.)
Local newspaper (physical paper/website)
Social media

Classical
More – 26%
Less – 9%

Net Using
More
41%
34%
13%
8%
16%
15%
10%
8%
-7%
-2%

% Using Less Now
42%
38%
23%
21%
21%
19%
15%
15%
38%
12%
10%
8%
-7%
-2%

% Using More Now
1%
4%
10%
13%
5%
10%
13%
15%
12%
15%
5%
5%
13%
5%
3%
Public Radio
And
COVID-19
More Than One-Fifth Do NOT Have a Working Radio in Their Homes That They Use

Public Radio

- Yes: 76%
- No: 22%
- Unsure: 1%

Commercial Radio

- Yes: 77%
- No: 22%
- Unsure: 1%

Christian Music Radio

- Yes: 74%
- No: 24%
- Unsure: 2%

“In your home, do you have a working radio that you use?”
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

- Regular radio in the car: 34%
- Regular radio at home: 31%
- Stream on the station website (computer/laptop, smartphone, tablet, etc.): 18%
- Stream on the station’s own mobile app: 12%
- Stream on a voice-command smart speaker: 11%
- Stream via an app that has many stations (iHeartRadio, Radio com, etc.): 11%
- A podcast produced by THE STATION THAT SENT YOU THIS SURVEY: 8%
- Regular radio while working outside your home: 6%
Nearly Three in Four Rate Their Home Station “Excellent” Since the COVID-19 Outbreak

“Think about your listening to THE STATION THAT SENT YOU THIS SURVEY. How would you rate the station SINCE the start of the COVID-19 outbreak?”

% Who Rate Their Home Station as “Excellent”

- Total: 73%
- Male: 71%
- Female: 75%
- Gen Z: 61%
- Millennials: 70%
- Gen X: 73%
- Boomers: 75%
- Silent: 71%
- Caucasian: 74%
- Hispanic: 77%
- African-American: 74%
- Asian: 67%
- Urban: 74%
- Suburban: 74%
- Rural: 70%
Three in Four Feel Their Home Station Is Paying the Right Amount of Attention to COVID-19

“As the COVID-19 outbreak has unfolded, how much attention do you feel THE STATION THAT SENT YOU THIS SURVEY is paying to the situation?”

Public Radio
- Just right amount: 75%
- Not enough: 1%
- Too much: 7%
- Don’t know: 17%

Commercial Radio
- Just right amount: 71%
- Not enough: 2%
- Too much: 4%
- Don’t know: 23%

Christian Music Radio
- Just right amount: 72%
- Not enough: 1%
- Too much: 3%
- Don’t know: 23%
Supporting Local Workers Is the Top Priority For Public Radio Listeners, Followed By Humor, Programming Distractions & Local Updates

- Support local workers (first responders, grocery store workers, etc.)
- Programs that provide a distraction from the coronavirus situation
- Updates from your local communities (conditions, closings, etc.)
- Breaking news alerts as they happen
- Play more music
- Press conferences with local officials
- Raise money for local causes
- Programming for the family (geared toward parents, kids, etc.)
- News updates about coronavirus

Net More

- Support local workers: 42%
- Humor: 35%
- Programs that provide a distraction: 33%
- Updates from local communities: 30%
- Breaking news alerts: 21%
- Play more music: 18%
- Press conferences with local officials: 15%
- Raise money for local causes: 12%
- Programming for the family: 11%
- News updates about coronavirus: 8%

% Want Less

- Support local workers: 1%
- Humor: 3%
- Programs that provide a distraction: 4%
- Updates from local communities: 2%
- Breaking news alerts: 3%
- Play more music: 8%
- Press conferences with local officials: 11%
- Raise money for local causes: 10%
- Programming for the family: 10%
- News updates about coronavirus: 25%

“Think about THE STATION THAT SENT YOU THIS SURVEY and what you’d like to hear from them as the COVID-19 outbreak has unfolded. Would you like this station to do MORE, LESS, or about the SAME AMOUNT of:”
Top of the Hour Newscasts More Important Now, Followed By NPR News, Local News, And Lighter Weekend Programming

- **Top of the hours newscasts**
  - Net Important: 47%
  - % More Important: 45%
  - % Less Important: 2%

- **NPR news shows (ex: “Morning Edition”)**
  - Net Important: 46%
  - % More Important: 44%
  - % Less Important: 2%

- **Local news shows**
  - Net Important: 35%
  - % More Important: 32%
  - % Less Important: 3%

- **Weekend shows (ex: “Wait, Wait…,” “This American Life,” etc.)**
  - Net Important: 28%
  - % More Important: 18%
  - % Less Important: 10%

- **Their digital offerings (app, website, smart speakers, etc.)**
  - Net Important: 21%
  - % More Important: 13%
  - % Less Important: 8%

- **Local talk shows**
  - Net Important: 14%
  - % More Important: 14%
  - % Less Important: 18%

- **Their social media page(s)**
  - Net Important: 11%
  - % More Important: 18%
  - % Less Important: 11%

“During this time of the COVID-19 outbreak, from THE STATION THAT SENT YOU THIS SURVEY how important is/are (item)?”
In the Coming Week, Nearly All Plan to Get Outside For a Walk/Workout, While More Than Eight in Ten Plan to Grocery Shop

- Go outside to take a walk or to work out: 92%
- Shop for groceries: 82%
- Video chat/conference with family/friends/co-workers: 67%
- Take a drive/ride in the car: 58%
- Get gas for the car: 45%
- Go to a pharmacy or drug store: 42%
- Have food delivered from a local restaurant: 31%
- Shop for beer/wine/liquor: 29%
- Work at a paid job outside the home: 13%
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

- Go outside to take a walk or to work out: 92%
- Shop for groceries: 82%
- Video chat/conference with family/friends/co-workers: 67%
- Take a drive/ride in the car: 58%
- Get gas for the car: 45%
- Go to a pharmacy or drug store: 42%
- Have food delivered from a local restaurant: 31%
- Shop for beer/wine/liquor: 29%
- Work at a paid job outside the home: 13%
PUBLIC RADIO SPONSORS
The Strongest Interest is in Hearing Sponsors Support Their Employees, Community Involvement & Customers

During the COVID-19 outbreak, how interested are you in hearing from public radio sponsor brands about...

- How they are supporting their employees: 39% Very Interested, 28% Interested, 19% Neutral, 6% Slightly Uninterested, 8% Uninterested
- How they are involved in their communities: 31% Very Interested, 29% Interested, 22% Neutral, 8% Slightly Uninterested, 10% Uninterested
- How they are helping their customers: 29% Very Interested, 29% Interested, 23% Neutral, 8% Slightly Uninterested, 10% Uninterested
- How they are preparing to manage the situation with their business operations: 26% Very Interested, 28% Interested, 25% Neutral, 10% Slightly Uninterested, 11% Uninterested

“During the COVID-19 outbreak, how interested are you in hearing from public radio sponsor brands about...?”
Membership and Fundraising
Most Are Sustaining Members, and Plan to Remain Members Through 2020

<table>
<thead>
<tr>
<th>Membership Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sustaining member</td>
<td>49%</td>
</tr>
<tr>
<td>Annual member</td>
<td>25%</td>
</tr>
<tr>
<td>Not a member</td>
<td>14%</td>
</tr>
<tr>
<td>Not certain</td>
<td>10%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>2%</td>
</tr>
</tbody>
</table>

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

- Very likely: 92%
- Somewhat likely: 6%
- Not very likely: 1%
- Not sure: 1%
- Don’t know: 2%

Diagram showing membership types and likelihood to remain a member.
“Which of these statements best describes how THE STATION THAT SENT YOU THIS SURVEY should raise funds during the COVID-19 outbreak?”

- Station needs support and should maintain its normal fundraising activities: 43%
- Station needs support but a fundraiser at this time is inappropriate: 43%
- Not sure/NA: 14%

% Saying Station Should Maintain Normal Fundraising Activities

- Total: 43%
- Male: 51%
- Female: 38%
- Gen Z: 35%
- Millennials: 44%
- Gen X: 41%
- Boomers: 43%
- Silent: 45%
- Caucasian: 43%
- Hispanic: 40%
- African-American: 41%
- Asian: 44%
- Urban: 43%
- Suburban: 43%
- Rural: 45%
Equal Split on the Issue of Fundraising During COVID-19; Women Are More Apt to Say Fundraising Is Inappropriate

“Which of these statements best describes how THE STATION THAT SENT YOU THIS SURVEY should raise funds during the COVID-19 outbreak?”

- Station needs support and should maintain its normal fundraising activities: 43%
- Station needs support but a fundraiser at this time is inappropriate: 43%
- Not sure/NA: 14%

% Saying Station Fundraising Is Currently Inappropriate

- Total: 43%
- Male: 37%, Female: 46%
- Gen Z: 36%, Millennials: 41%, Gen X: 44%, Boomers: 44%, Silent: 40%
- Caucasian: 43%, Hispanic: 47%, African-American: 46%, Asian: 40%
- Urban: 43%, Suburban: 44%, Rural: 40%
Takeaways
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 —
Any Brand Can Emerge In a Crisis
Re-Examine Your Model
Re-Examine Your Messaging

THE SAFER WAY TO BUY OR TRADE A CAR

CUBS CANCELLED
WHITE SOX CANCELLED
BLACKHAWKS CANCELLED
BULLS CANCELLED
MARCH MADNESS CANCELLED

NOT CANCELLED
Shift Your Location Strategy

Nearly Nine of Ten SiriusXM Subscribers Listen In Their Cars On an Average Weekday

- In a vehicle: 87%
- At home: 37%
- At work: 20%
- Any other place: 10%

% of SiriusXM satellite radio paid or free/trial subscribers who listen to the service in each location on an average weekday.
Shift Your Location Strategy

#STAYHOME RADIO

Feel-good music to lift your spirits

SIRIUSXM SATCHELITE RADIO

SOULCYCLE RADIO

SIRIUSXM
Promote Your Streaming Channels/Gadgets
Promote Your Streaming Channels/Gadgets
Promote Your Streaming Channels/Gadgets

npr.org/smart

Stay connected at home.

Ask your smart speaker to “Play NPR”
Stay At Home = A Fashion Statement?

Good morning. 3:48am in the basement studio, and here we go.
“Stay At Home” = The New Intimacy
“Stay At Home” = The New Intimacy
Even Before COVID-19...

Younger Listeners Are More Driven By Local Radio

“One of radio’s primary advantages is its local feel”

jacobsmedia.com | @fnjacobis | PRTS2019
Support Your Local “Essential Workers”
Celebrate Local

PHOTOS: Life In Austin During The Coronavirus Pandemic

Michiganders at home: Show or tell us something good

By MICHIGAN RADIO NEWSROOM - 21 HOURS AGO

Share Tweet Email

The State Theatre in Ann Arbor, MI
KATE RAYMOND / MICHIGAN RADIO
Support Local Businesses
Support Local Businesses
Contact Us

• www.jacobsmedia.com
• www.jacapps.com
• fred@jacobsmedia.com
• @fnjacobs
• @jacobsmedia
• www.jacobsmedia.com/blog