



Public Radio

Meta-Analysis

A Curation of Insights and Best Practices Concerning the
Landscape of Public Radio

July 2023

Prepared by City Square Associates as part of the 2023
Public Radio Meta-Analysis project, in partnership with
SRG, Greater Public, and PRPD



Table of Contents

Foreword	2
Introduction	3
Theme I: Strengthening Our Service to the Community	6
1. News and Talk	6
2. Music	11
Theme II: Tone and Format	14
1. News and Talk	14
2. Music	17
Theme III: Financial Sustainability	20
1. News and Talk	20
2. Music	23
Case Studies	25
Bibliography	29

Foreword

Before we present this comprehensive meta-analysis, we must first acknowledge that this research undertaking would not have been possible without the invaluable support and contribution from numerous public radio stations and research companies who generously shared their insights and data with us. Your generosity in sharing your knowledge with us has enriched our understanding of the industry and has directly impacted both the robustness and credibility of this descriptive report.

This meta-analysis project epitomizes the spirit of collaboration and serves as proof of the great benefits that come when knowledge and data are shared openly among friendly parties with aligned interests. We are honored to have had the opportunity to incorporate your findings into our analysis, and hope the findings of this project promote larger conversations and lead to more collaborative efforts moving forward.

We are honored to have received the opportunity to build on such a robust foundation built on the combined efforts of experienced researchers and industry stakeholders. We hope that the findings in this report serve as a catalyst for positive change in the public radio industry generally, and that this spirit of collectivism paves the way for more combined efforts in the future.


Introduction

Public radio has long served as an important source of media consumption for a significant segment of America’s population. A tradition passed down through the generations, public radio has kept us informed, delighted, educated, and entertained. However, as changes in technology and culture continue to reshape how people consume media, public radio stations face a broad range of challenges and opportunities in adapting to the evolving needs and preferences of their audiences.

A number of research studies have been commissioned between 2019 and 2023 on behalf of public radio organizations in an effort to collect data on how audiences find content, how they think about public radio, and how public radio content fits into their media diet—all in an effort to better navigate changes in the media landscape. In collaboration with the Station Resource Group (SRG), Greater Public, and PRPD, this report is an effort to analyze and aggregate the findings from such studies into a single and, hopefully, widely applicable resource. By synthesizing the existing body of knowledge generated through these disparate and often locally-focused studies, our objective is to paint a comprehensive *national* picture of public radio that would offer guidance on how to future-proof it in the face of an ever-changing market and identify knowledge gaps where more learning may be needed.

In this report, we summarize how these studies explore the multifaceted aspects of today’s public radio industry—highlighting key trends around content, tone, platform distribution, and considerations for financial sustainability. Having reviewed the data from these studies, thematically categorized their conclusions, and spotlighted unique case studies, we aim to equip decision-makers and interested parties with information to form actionable strategies that will shape the trajectory of the public radio industry and ensure its continued relevance in communities across the nation.

While this report elevates a number of discrete themes and takeaways from these studies, something broader and more implicit emerges. Namely, for public radio to both survive and thrive in the near future, there will need to be a shift in mindset from a newsroom-driven or producer-



For public radio to both survive and thrive in the near future, there will need to be a shift in mindset from a newsroom-driven or producer-driven approach, to one that focuses on serving the community as a whole.

driven approach to one that focuses on *servicing the community as a whole*. This mindset will have significant implications for all kinds of strategic work—content development, marketing, branding, fundraising—and, in an increasingly uncertain future, represents a promising path forward.

Methodology

This report presents the findings from a meta-analysis conducted by City Square Associates. The analysis was based on a review of 26 reports based on studies commissioned by public radio organizations—sometimes individually, other times in collaboration with other organizations. These studies were curated by SRG, Greater Public, and PRPD as a collection of research that addressed a wide range of topics and strategic areas. CSA reviewed and analyzed the reports with the objective of uncovering themes, learnings, and takeaways that were relatively consistent (i.e., they were observed or described in two or more studies). Curated on the basis of awareness, it is possible that other research studies exist that explore similar topics covered in this report, or further address the knowledge gaps that we've identified. If so, it is our hope that those studies will be surfaced in conversations about this analysis and can be shared more widely. Because the methodologies varied so widely, and since many of the studies were qualitative, the results from the various studies are not, strictly speaking, commensurable. But there was sufficient symmetry among the various studies, both in aspiration and findings, to draw some conclusions.

This document is a **descriptive report** that identifies consistent strengths, weaknesses, opportunities, threats, risks, and mitigations present throughout the different studies. In addition, we have separately prepared a **prescriptive playbook** that focuses on how the findings from these reports may translate into specific strategic directions or actions, designed to help public media organizations think about how they can best augment existing services, expand potential content offerings, and ultimately broaden the size and profile of their audience. Integrated within the prescriptive playbook, City Square has detailed specific recommendations for future research designed to fill the knowledge gaps uncovered in this analysis.



The present report is organized into three thematic sections: the first focuses on how public radio stations can most effectively improve the ways in which they **serve local communities** and a broad range of audiences. The second section elevates findings around **tone and format**, while the third section focuses more specifically on **financial sustainability**. Within each section, we discuss and summarize key takeaways that were observed across two or more studies in our catalog. Each section is also divided into insights relevant to “News and Talk,” and insights relevant to “Music”—understanding the unique landscape and realities of public radio organizations operating in each space. At the end of each section, we also provide a concise wrap-up of our own observations having reviewed the catalog of studies—under the heading of “Analytic Considerations”—namely, speaking to open-ended conclusions or learning gaps that appear to exist in the collective knowledge of public radio.

Toward the end of this descriptive report, we showcase two case studies that address broader themes that were uncovered in a unique way in those particular studies. The report concludes with a bibliography of the reports and studies reviewed for this meta-analysis. Of the 26 reports reviewed, 17 are cited in this report, while the remaining 10 are listed in the bibliography as related studies that provided useful background or corroboration even if not directly cited.

Theme I:

Strengthening our Service to the Community

Findings around News and Talk

Summary of themes

- Brand awareness among younger audiences is often consistent with that of older audiences. However, for younger audiences, the perception exists that public radio is not made for them.
- Public radio tends not to be relied upon as a go-to source for news among younger and more diverse audiences.
- Audiences crave content that is local and relevant to their lives, and public radio is uniquely positioned to address these needs.

Public radio faces direct competition in the news and talk space from an increasing array of viable alternatives across brands and platforms. The world of audio now features options ranging from established legacy media brands to influencers and independent producers, distributing live or on-demand content across new apps and services, and packaging them in newly consumable ways. In response to this new competitive landscape, the research from this analysis reveals a clear pattern about audio consumption: habits and perceptions across all demographics have shifted accordingly, leaving public radio at a possible disadvantage when it comes to maintaining, let alone growing their audience.

A study conducted by Corona Insights on behalf of Community Radio for Northern Colorado and KUNC showed that brand awareness among younger listeners (aged 35 and under) is similar to the general population. At the same time, they tend to feel that public radio is not produced for *them*.¹ In a series of focus groups conducted with a diverse sample of participants living in CRNC 's market, African-American and Hispanic participants who liked listening to audio content—but were not current CRNC listeners—reported that they were generally familiar with NPR, and even referenced having heard KUNC's radio call sign before. However, most participants

Among younger listeners... a clear perception exists that public radio is not produced for them.

¹ Residents of CRNC Key Geography: Attitudes Towards State & Local Media, 2022

expected NPR and KUNC’s content to cater to an older audience, seem low-budget, lack production value, and focus on politics.²

While this younger and diverse audience (aged 35 and under) indeed showed an interest in news content, public radio was not their preferred source for state and local news content. To keep tabs on breaking news, participants instead describe doing so primarily through television (both local and national stations and social media); if they wanted additional information regarding current events, they would turn to Google or YouTube.³ This trend was consistent throughout the general population as well. In an earlier 2022 survey of residents living in CRNC’s market, results showed that only 31% of residents said they use radio stations (over the air, online, or through an app) to stay up to date with the news at least weekly.⁴ Alternatively, 92% of residents aged 18–44 (and close to 50% of residents aged 45+) stated they used a smartphone to consume information daily.⁵ 60% of all residents use TV, and 51% of residents use social media to stay up to date on news.⁶ Indeed, radio ranked 6th as a source for state and local news (16%) behind TV (48%), friends and family (40%), newspapers and magazines (39%), social media (29%), and online sources that were not social media (28%).⁷ This points to the reality that radio in general cannot be assumed to be a default source for news and current events for many Americans.

Although this seems to paint a grim picture of the future of public radio, the available data also show cause for optimism. Uniquely positioned in local communities throughout the United States, the general audience’s interest in content that is both local and relevant to their daily lives provides public radio with not only a distinct competitive advantage in the current market but a clear path forward in the future.

This preference for localism was consistent throughout the research reviewed in this analysis. For example, in a 2022 survey of New England Residents by SmithGeiger

The general audience’s interest in content that is both local and relevant to their daily lives provides public radio with not only a distinct competitive advantage in the current market, but a clear path forward in the future.

² *Young Residents of Color in Northern Colorado: Listening Habits, Desires, and Perceptions of Radio, 2022*

³ *Young Residents of Color in Northern Colorado: Listening Habits, Desires, and Perceptions of Radio, 2022*

⁴ *Residents of CRNC Key Geography: Attitudes Towards State & Local Media, 2022*

⁵ *Residents of CRNC Key Geography: Attitudes Towards State & Local Media, 2022*

⁶ *Residents of CRNC Key Geography: Attitudes Towards State & Local Media, 2022*

⁷ *Residents of CRNC Key Geography: Attitudes Towards State & Local Media, 2022*

LLC for New England News Collaborative, 80% of respondents agreed with the statement, "I'm a New Englander and I'm interested in news from throughout the region."⁸ While alternative sources for local news are prevalent, the reports suggest that authenticity and solutions-orientated journalism can be key differentiators in a crowded market, with 68% of respondents in the New England survey stating that they would pay more attention to a local news source if it was committed to providing the facts and actively exploring solutions to problems.⁹

In Colorado, daily radio listeners were more likely to say that they supported news outlets financially because they covered topics/issues that they cared about.¹⁰ In addition to expressing a desire for solutions-focused journalism, respondents in New England reported that "information on how local government institutions are supposed to work," "entrepreneurship and personal finance," and "investigations that hold the powerful to account" were much harder to find, while national news, current affairs from around the world, and sports were easier to find.¹¹ Participants in a Kansas City Focus Group for station KCUR showed high interest in stories that made them feel more connected to their community but were less interested in stories from areas that were significantly further away.¹² All of this points to the power of local relevance in how public radio can expand its share of people's media diets, offering a strategic path for strengthening and expanding its audience.

Analytic Considerations

While the existing research suggests an interest in news stories that are local and relevant to people's lives, there was less of a focus on investigating the chasm between these audiences' stated preference for local news content and the low rates at which audiences *actually turn to* public radio as a source for this content. What is holding them back? When CRNC residents were asked to name their top three sources for how they typically get news about their state or community, "Radio (generic)" was ranked 15th behind sources like a "specific newspaper" (#1), "TV (generic)" (#4), "Facebook" (#6), "online/internet" (#8), "Google" (#13), and "phone/mobile apps" (#14). Notably in these open-ended responses, no

⁸ *New England News Collaborative: Audience Needs and Behaviors Research, 2022*

⁹ *New England News Collaborative: Audience Needs and Behaviors Research, 2022*

¹⁰ *Residents of CRNC Key Geography: Attitudes Towards State & Local Media, 2022*

¹¹ *New England News Collaborative: Audience Needs and Behaviors Research, 2022*

¹² *KCUR Research Takeaways, 2023*

respondents from CRNC’s market called out KUNC by name. This raises the question that if audiences are indeed interested in local news, and public radio stations are editorially well-positioned to address these needs, then why is public radio not mentioned as a top source for these types of content?¹³

Additionally, if audiences are truly satisfied with alternatives to public radio, what unmet needs—if any—exist that public radio *is* well-positioned and well-structured to address? More research is needed to specifically examine the local news consumption habits of those who are non-rejecters of public radio. Why do such individuals find these competing sources appealing, how do they discover local news content, and what specific pain points do they experience while attempting to use public radio to satisfy those same content interests?

Another trend observed in reviewing these studies is a tendency to typecast current listeners and their listening habits as “traditional.” While this notion may be comfortable for decision-makers operating in the public media space, whose platforms are often charged with being antiquated and obsolete, we believe this to be a critical oversimplification.

Looking closely at the data in Wisconsin Public Media’s 2022 survey on “The State of Public Radio in Post-Pandemic America,” the true modernity (in terms of preferences) of today’s public radio audience comes into sharp focus. Asking public radio fans how they listen to their favorite stations, 59% stated traditional means such as AM/FM radio at home, work or school, or in a vehicle, with 36% stating that they accessed these stations via digital means like mobile apps or laptop/desktop streams.

While this statistic could be read as supporting the common belief that audiences for public radio are traditional by nature, upon reexamination, it is noteworthy that over a third of these radio “fans” *still* stated that they accessed this “traditional” content through digital means. This suggests that even core segments may be migrating to digital platforms at a higher-than-expected rate, and questions remain about what a true inventory of these



Existing research shows that digital transformation is being adopted by all age cohorts, even among segments labeled as “traditional”



¹³ Residents of CRNC Key Geography: Attitudes Towards State & Local Media, 2022

audiences' "traditional" versus "digital" content consumption habits would actually look like.¹⁴

The fact remains that the challenges presented while trying to acquire new audiences are the same challenges public radio will face while trying to future-proof its existing audience. While stakeholders in public radio have long worried about the challenges presented by "tech-savvy" younger audiences, the existing research shows that digital transformation is being adopted by all age cohorts, even among segments labeled as "traditional." By working to address issues illuminated by the rise of digital transformation generally, available data suggest that public radio will inevitably also solve issues related to converting younger audiences. Potential solutions can be approached holistically with the knowledge that the challenges of one segment are not so different from the other.

¹⁴ *The State of Public radio in Post-Pandemic America*, 2022

Findings around Music

Summary of themes

- Younger listeners prefer stations that allow them to discover new artists, and they tend to avoid stations if they feel they replay songs too often.
- Authenticity is very important to younger audiences, and public radio may be rejected as a source for music if it's perceived to be too "mainstream."

The disruptions to the music industry brought about by streaming over the past decade cannot be overstated. Changes in technology and the proliferation of new sources for content have corresponded to changes in people's habits for listening to music. Notably, streaming apps such as Spotify and Apple Music offer listeners uninterrupted listening experiences, while serving subscribers algorithmic recommendations that allow listeners to passively discover new artists and genres. While the situation can be viewed as dire, existing research provides some reasons for optimism, and highlights areas of much-needed improvement. Audience growth for public radio in the music space will rely on its ability to appeal to expanded communities of listeners by proving and communicating its unique utility in the age of the streaming giants.

There is value and opportunity for public radio in helping listeners discover new music and offering variety. A 2022 KUTX study of the Triple-A "Life Group"¹⁵ (understood to refer to an affinity-based segment of the population) found that 90% of Life Group members believe that it is very or somewhat important that the radio stations they listen to help them discover new music.¹⁶ 74% stated that it is very or somewhat important that the radio stations they listen to offer different types of music, with 71% believing that it is very or somewhat important that these stations play music from local

There is value and opportunity for public radio in helping listeners discover new music and offering variety.

¹⁵ In order to qualify for the Lifegroup, respondents Rated one or more of the two KUTX Blends (KUTX As Is and/or KUTX Newer Leaning) a "7" or higher and said that they would listen Regularly or Occasionally to a station playing that blend of music, and/or Said they listen to KUTX Regularly or Occasionally in a typical week

¹⁶ Paragon: *KUTX Triple a Lifegroup + Member Study, 2022a*

artists. A different Life Group study¹⁷ funded by Indie 102.3 found that music quantity, variety and discovery are important features to both the Life Group and Members, with good music, new music, no commercials and variety being key value propositions.¹⁸

The studies also highlighted the importance of focusing on quality and “owning your space.” The Indie 102.3 report found that members believed that the station had been getting worse lately, with members citing that the station had become “too corporate and mainstream” along with other subjective complaints about there being, in their opinion, too much repetition, too much talking, and what they considered to be bad music choices.¹⁹

The research also suggests that capitalizing on general awareness may have a positive impact on audience growth. In the world of classical music, a 2020 Nashville Public radio survey showed that although station WFCL owned the association with the Classical Music Blend among both the total 18–54 market and member population in Nashville, of the 71% of who were familiar with the station, only 15% listened regularly.²⁰ While some of the gap between awareness and usage is a function of the niche nature of the classical genre, there is surely an opportunity to close the gap at least somewhat. Effective strategies for audience growth in classical radio are covered in greater detail later in this report, in the second of our two case studies.

Analytic Considerations

In general, as far as existing research goes, the role music plays in the future of public media has received less attention than news and talk. While many of the reports included statistics on existing listener preferences, none of the reports reviewed in this analysis were focused exclusively on public radio’s value proposition in a disrupted music market that includes giants like Spotify and Apple Music.

Future research should center on what unmet needs exist within the music listening community, what can possibly be addressed by public radio—and for those listeners who

¹⁷ Indie Target Audience Life Group is defined as a respondent who rated one of more of the three music blends (Indie, Triple A, Alternative) a “7” or higher and said that they would listen regularly or occasionally to a station playing that blend of music and/or reported that they listened Regularly or Occasionally to Indie 102.3 in a typical week.

¹⁸ Paragon: *Indie 102.3 Market + Lifegroup + Member Study, 2020*

¹⁹ Paragon: *Indie 102.3 Market + Lifegroup + Member Study, 2020*

²⁰ Paragon: *Nashville Public radio Market + Lifegroup + Member Study, 2020*

continue to listen to music on public radio—what is unique about the offering that keeps them showing up with so many popular options available to them?

Future research studies should focus not just on terrestrial radio, but should be designed to test the appeal of expanded digital offerings as well. This should involve gauging general public awareness of existing local offerings, as well as general awareness and perceptions of national success stories like KEXP's live performance offerings on YouTube or NPR's *Tiny Desk Concerts*. Offerings with broad appeal may be duplicated to resonate with local markets.

Theme II:

Tone and Format

Findings around News and Talk

Summary of themes

- Across demographics, many listeners find that public radio is boring and lacks energy.
- Listeners are migrating to other news and talk formats like podcasts, which allow them to dig deeper into a broader range of topics.
- On-demand content resonates with audiences, as it allows listeners to access their favorite content at their own convenience.

As outlined earlier, audiences have an appetite for local news coverage that is relevant to their communities and lives, but public radio is not currently positioned as the go-to source for local news and content for most. In many cases, this trend is due to the widespread idea that public radio is built for a different time. The audience needs for news, talk, and information are more readily addressed through different platforms that offer similar value in a more entertaining and digestible way.

For younger listeners, the problems with public radio can be summarized in one phrase: “very boring.”

Participants in a KCUR focus group communicated the impression that KCUR/NPR is “dry and boring,” and that in order to listen to public radio, they had to be in the “right mood”.²¹ While younger audiences focused on the entertainment value (or lack thereof) of public radio, existing reports show that older audiences were more

concerned with a public radio tone they associated with a perceived liberal agenda. Even among avid listeners in the older group of the KCUR focus groups (a segment firmly in public radio’s target audience), the perception existed that the tone of KCUR/NPR was that of “left-leaning bias.”²²

In Sacramento, a CapRadio/KXJZ survey of Local News Life Group members showed that in their target market, CapRadio had very low rates of unaided use and news source

For younger listeners, the problems with public radio can be summarized in one phrase, “very boring.”

²¹ KCUR Research Takeaways, 2023

²² KCUR Research Takeaways, 2023

preference.²³ Additionally, the survey found that 39% of CapRadio users in the Local News Life Group still preferred to get their news from non-traditional sources such as news aggregators or social media, as opposed to radio.²⁴ When surveyed, former users of CapRadio agreed that the station needed “more energy,” was overtly “monotone,” and could be viewed as “too liberal.” 61% of residents also wanted to see the station report more on facts instead of what they perceived as taking positions on the issues.²⁵

As the desirability of public radio as a source of news continues to dwindle amongst younger audiences and the general population, even among dedicated fans of public radio, the adoption of digital methods of consumption seems to be accelerating. In a 2022 Jacobs Media survey conducted for Wisconsin Public Media, 36% of fans of the station stated that they access their favorite radio stations digitally through mobile apps, computer streams, smart speakers, and podcasts.²⁶

Even among dedicated fans of public media, adoption of digital platforms seems to be accelerating.

In regards to listening behaviors post-pandemic, moderators from a Michigan Radio study noticed a definitive uptick in podcast listening among participants across the board, attributing this trend to reasons such as:²⁷

- Listeners have more time available to listen
- The ability podcasts provide to dig deeper into a topic with long-form content, something some complain NPR programs do not provide
- More control over content/flexibility and the ability to “time-shift” programs
- Escapism from negative news like COVID and politics, with increased listening to genres like true crime and other escapist topics
- The ability to listen to audio at home (versus in their work environment)
- Podcast listening fits better into lifestyle activities such as walking, working out

Throughout the studies reviewed, this theme of increased podcast listening remained consistent. While audiences are still very much interested in news and talk content, alternative formats like podcasts, and platforms like social media and YouTube, have

²³ Paragon: *CapRadio News Lifegroup + Member Study*, 2022

²⁴ Paragon: *CapRadio News Lifegroup + Member Study*, 2022

²⁵ Paragon: *CapRadio News Lifegroup + Member Study*, 2022

²⁶ *The State of Public radio in Post-Pandemic America*, 2022

²⁷ *Michigan Radio Focus Group Report*, 2021KXJZ

reshaped audience expectations. Public radio—once in a strong position in a landscape that previously had few alternatives for news and talk audio content—is no longer the primary or preferred option.

Analytic Considerations

The tone of public radio is the “elephant in the room” of the existing research. While the reports were detailed in outlining a number of possible reasons why listeners may have shifted away from public radio to competing platforms, only KCUR’s “Research Takeaways” report calls this common perception out boldly by making it their number one focus group takeaway.²⁸ While “pulling punches” may be a harsh way of describing these omissions, existing research seems designed to tip-toe around this uncomfortable truth: There exists a common belief in the general public that public radio is boring.²⁹

To unpack this belief further, and in order to build strategies that would work to reshape these perceptions, additional brand perception research would be useful. It will be vital to understand if these beliefs are unique to certain audience segments, or are consistent across the board for both listeners and non-listeners. Furthermore, among respondents that view public radio as boring, it is important to answer the question: What types of content and what formats do they view as *not* ‘boring’? Additional qualitative research with these segments would be useful in not only adding further texture to this sentiment but testing specific content and messaging designed to redefine the tone of public radio.

In regards to format, very little is known about the drivers of audiences’ preferred formats. Is convenience the key factor? Do people still like live audio content? Or are people listening more on demand? What is the perceived value of live content, and what role does it play in an individual’s overall audio media diet? How can public radio re-position to offer content in formats that more readily reflect the needs and preferences of listeners? Additional research would help shed light on all of these questions.

²⁸ *KCUR Research Takeaways, 2023*

²⁹ *KCUR Research Takeaways, 2023*

Findings around Music

Summary of themes

- In music, variety and a finger on the pulse of the local music scene are key differentiating factors for Public Radio.
- A cross-platform approach will likely be successful if content is local and relevant to listener's lives.

The increased threat from streaming platforms like Spotify and Apple Music, as well as video platforms like YouTube (used as a source for both video and podcast content), is relevant not just to considerations around content strategy highlighted in the first section but is also clearly relevant to what listeners look for by way of tone and experience. While knowledge gaps do exist concerning specific ways that public radio can improve the format, tone, and availability (or findability) of their music, the existing research does provide subtle clues to how this can be achieved.

Quality, variety, and a local live presence are all crucial. A 2020 Indie 102.3 study showed that audiences value stations that are subjectively perceived as playing the best music—particularly local music—are involved in the local music scene, have live and local DJs, and air interviews and live studio performances.³⁰

Audiences dislike stations that repeat songs too often, are perceived to play “bad music,” and talk too much.

Quality, variety, and a local live presence are all crucial.

While a cross-platform approach to music distribution is needed (in order to maintain relevance), a 2022 survey of KUTX members and listeners exposed some common pain points for stations that have already implemented these cross-platform strategies. The research found that although a diverse range of alternative streaming options was available, most KUTX listeners continued to access the station on terrestrial FM radio, with 94% of members and 87% of those in the Life Group stating that they did so.³¹ Across the board, streaming resulted in dramatically different usage among station members (those who donated to KUTX) compared to listeners (regular listeners of KUTX programming).³²

- 42% of members streamed KUTX on their phone compared to 25% of listeners

³⁰ Paragon: *Indie 102.3 Market + Lifegroup + Member Study, 2020*

³¹ Paragon: *KUTX Triple a Lifegroup + Member Study, 2022*

³² Paragon: *KUTX Triple A Lifegroup + Member Study, 2022*

- 42% of members streamed through a computer, compared to 15% of listeners
- 30% of members streamed through a smart speaker, compared to 18% of listeners, and 25% of members streamed on the KUTX app, compared to only 8% of listeners.³³

These numbers indicate that while members who may be “in the know” are more likely to stream stations using alternative methods, more marketing effort may be needed to increase awareness and usage among both listeners and the general public.

The existing reports suggest that promoting local content through digital channels can lead to opportunities for increased engagement. For KUTX, 50% of members reported visiting the KUTX website at least once a month.³⁴ Their reported reasoning for visiting the website lends credibility to the value of a community-centered approach outlined earlier in this report: 38% visited the website to read stories about

the Austin music scene, while a similar percentage visited to listen and stream KUTX live. In addition, 25% visited to learn more about programs and hosts, 21% to access playlists, and 15% to view video sessions. These findings suggest that online platforms can play an effective role in creating a digital sense of place for listeners and creators in local communities. If done correctly, digital platforms can serve to not only augment public radio’s existing service and content offerings but can serve as a destination for audiences themselves. Included in an integrated strategy, these platforms offer public radio additional listener touchpoints in a broadened funnel, and increased opportunities for membership conversion.

Promoting local content through digital platforms can lead to opportunity for increased engagement.

Analytic Considerations

Consistent with knowledge gaps in the news and talk space, more work is needed to understand how the tone and format of public radio’s music offerings are perceived by today’s listeners and to test specific strategies to improve participation and engagement. For instance, while the current body of research delivers a clear mandate to begin “thinking local,” research on existing solutions for local music is needed to identify best practices in order to position public radio correctly in these local markets. How can public

³³ Paragon: *KUTX Triple A Lifegroup + Member Study*, 2022

³⁴ Paragon: *KUTX Triple A Lifegroup + Member Study*, 2022

radio authentically tap into or amplify local bands or musicians? What is the best way to capture local live performances and package them for audiences, either live or on-demand?

Additionally, due to the immense importance audiences place on stations playing “good music” and avoiding “bad music,” knowledge is needed to ensure the playlists of local stations accurately reflect the distinct preferences of their audiences. What exactly is the appropriate ratio of music to dialogue? Can these issues be solved by creating unique opportunities to involve the audience in programming choices?

While national research is needed in other areas, when it comes to augmenting music programming and services on public radio, this is a subject in which more local market-focused studies would add value, as a way to build an accurate understanding of these local geographies from a broader range of communities. In other words, is Nashville different from Boston, Minneapolis, or Portland?

While existing research focuses heavily on the preferences of *existing* listeners, it will be important to unpack the music listening preferences of those who don’t often or ever listen to public radio for music. A re-segmentation of music audiences generally—including listeners and non-listeners—would help stations understand pain points with streaming competitors, and position themselves appropriately in a way that is both consistent with their existing brands, and responsive to those unmet needs.

Theme III:

Financial Sustainability

Findings around News and Talk

Summary of themes

- Radio listeners are more likely to financially support content that is relevant to their lives.
- Accordingly, improving brand awareness in local communities can foster membership growth if content is properly aligned with audience expectations.
- Stations must work creatively to find alternative means of funding beyond traditional fund drives.

A community-centered approach is not only essential to the development of prospective audiences but plays a key role in the future financial sustainability of the public radio industry as a whole. While radio listeners are more likely to financially support content that is relevant to their lives, it is brand awareness in local communities that can provide a sustained competitive advantage and membership growth, if content is indeed properly aligned with the audience's expectations.

Brand awareness in local communities can provide a sustained competitive advantage and membership growth.

In 2021 focus groups conducted for WHYY, researchers found that community conversations are an avenue for boosting awareness, engagement, and trust. The focus groups uncovered how cultivating on-air talent was key to cultivating audiences, as participants indicated a desire to see on-air talent out and about at community events.³⁵ This suggests that local community engagement by on-air talent can be key to getting new listeners to become aware of the station, interested in the programming, and ultimately into the membership funnel, therefore making it a valuable component to any financial strategy moving forward.

³⁵ WHYY Audience Development and Strategy Focus Group Research Report – Executive Summary, 2021

While participants showed little interest in new revenue models like subscriptions or tip-jars, they indicated that they would show more interest in becoming members if they knew that membership came with benefits like food and activity/event discounts (including discounts for family and kids' activities and events.)³⁶ This finding—in combination with a 2021 KERA-FM survey—supports the assertion that membership and fundraising generally must be reimagined to promote growth and appeal to aspirational audiences. The KERA-FM survey showed that a large group of KERA-FM users were “solid prospects” that would be open to membership. However, even among those users that “realize that the station relies on contributions to operate” two-thirds were *not* current members.³⁷

The survey also found traditional fund drives to be lacking in effectiveness. Nearly two-thirds of KERA-FM users in the Local News Life Group agreed that they often change the station during these fund drives.³⁸ With many lapsed members naming personal financial concerns as the reason why their membership is not current, the study suggests as solutions the possibility of personalized outreach, smaller donation options, and “non-traditional fundraisers” to appeal to younger users.³⁹ The study suggests separate fundraising-focused member surveys might help identify what these effective “non-traditional fundraisers” could possibly consist of.⁴⁰

Membership and fundraising generally must be reimagined to promote growth and appeal to aspirational audiences.

Analytic Considerations

Given the need to migrate from a producer-driven distributor of content to a community-centered organization with close ties to their local constituents, it would be worthwhile to further explore the relevance and appeal of specific alternatives to fundraising, and how the concept of “membership” could be reimagined to include people new to public radio. While it is clear that audiences crave content and services that resonate with their daily

³⁶ *WHYY Audience Development and Strategy Focus Group Research Report – Executive Summary, 2021*

³⁷ Paragon: *KERA News Lifegroup Study, 2021*

³⁸ Paragon: *KERA News Lifegroup Study, 2021*

³⁹ Paragon: *KERA News Lifegroup Study, 2021*

⁴⁰ Paragon: *KERA News Lifegroup Study, 2021*

lives, pricing studies can be used to judge willingness to pay for public radio's existing offerings, and to answer questions such as: what exactly are these audiences willing to pay for when it comes to audio-based news content? And: exactly what price are they willing to pay for public radio specifically?

As listeners continue to migrate to digital formats, questions remain on how best to reach these audiences, what messaging and marketing tools resonate with audiences on digital platforms, and if these new tactics can provide a sustainable financial model as the relevance and effectiveness of traditional fundraising continue to wane. Current trends suggest that the future financial sustainability of public radio will rely on its ability to communicate value to its local communities, aligning their offerings with the unmet needs of current and potential new listeners, and working creatively to find ways to monetize beyond the pledge drive.

While institutions in public media are increasingly defining their perceived direct competitors as the streaming giants and other digital platforms, pigeonholing themselves into the role of just "content producers" can have negative consequences moving forward. Public media's true superpower is not that they produce and distribute superior content; it is that they are community-based organizations, capable of demonstrating impact that goes beyond just the content they produce.

To this end, existing research does little to enlighten the value that public radio adds beyond the content they produce and distribute. Membership is defined as individuals who can contribute financially and holds in little esteem those who have high engagement with and/or affinity for public radio brands. Existing segmentation prioritizes monetary giving and ignores not only the value of community impact, but the value highly-engaged individuals can provide stations through promotion and organic word of mouth. The opportunity exists to conduct research designed to uncover not just unmet needs in content consumption, but to unveil areas of need in local communities that public radio is well positioned to address.

Findings around Music

Summary of themes

- Different giving options are needed that are outside of typical fund drives.
- Audiences are unaware of key value propositions.

Membership considerations in the music space greatly mirror those from news and talk. Potential members are turned off by traditional means of fundraising, and existing members increasingly request additional benefits that connect them more deeply with their local music scenes.

A 2020 survey for KXT found that a large percentage of KXT listeners are not current members, with very few of these listeners having ever contributed.⁴¹ The survey also found that at the time, the nation's economic climate may have hindered the station's ability to retain current members and gain new members, declaring that looking towards the future, continued over-reliance on fund drives will turn off audiences and limit membership potential.⁴²

The research suggests that with existing fundraising models, radio stations are currently converting only a small percentage of interested audiences—especially younger listeners. An Indie 102.3 survey found that while close to 60% of the Indie Life Group was aged 18–34, their current member audience was much older than the Life Group, with only 10% of members being under the age of 30.⁴³

Additionally, audiences seem to be unaware of key value propositions for what public radio offers in the music space, and why listeners should contribute. Despite widespread resistance to commercials, a KUTX survey showed that among those who were familiar with the station, 43% were unaware that the station was non-commercial (and by extension, listener supported.)⁴⁴ 85% of the members of the Triple-A Life Group were not

Potential members are turned off from traditional means of fundraising, and existing members increasingly request additional benefits that connect them deeper to their local music scenes.

⁴¹ Paragon: *KXT Market + Lifegroup + Member Study, 2020*

⁴² Paragon: *KXT Market + Lifegroup + Member Study, 2020*

⁴³ Paragon: *Indie 102.3 Market + Lifegroup + Member Study, 2020*

⁴⁴ Paragon: *KUTX Triple a Lifegroup + Member Study, 2022*

current members.⁴⁵ When asked why they are not current members of KUTX, the top answers were:

- Not currently being in a position to make a contribution or can't afford it
- Not using the station as much as in the past
- Unhappy with current programming
- Unaware that public radio stations need contributions
- Didn't know how to donate

Creativity, therefore, is needed to develop a fundraising structure that goes beyond transactional giving and acknowledges the value that public radio provides to local communities besides being just a content distributor.

Analytic Considerations

Topics around the relevance of current membership models for music in public radio have gone largely untouched in the existing research. The statistics and anecdotes found in the studies reviewed for this analysis seem to only tangentially touch on the subject and don't always result in clear conclusions specific to the question of how public radio organizations can become more financially sustainable.

Notably, the studies focused heavily on the listening preferences of current members rather than non-listeners in the general public.⁴⁶ Accordingly, there are questions left unanswered about what would motivate non-listeners to give to their local public radio music station. What is their willingness to pay? What would they pay for? What new offerings or value propositions would move the needle to contribution? What modes of giving would be most convenient or amenable? And in what ways are non-listeners different in these regards compared to current members?

Additionally, as with news and talk, more knowledge is needed to understand what ways public radio can add value to local music scenes. While learnings from national surveys for news and talk may be easier to disseminate and implement locally, in music, a diverse range of audience interests and varied competitive sets make locally-focused research critical moving forward.

⁴⁵ Paragon: *KUTX Triple a Lifegroup + Member Study, 2022*

⁴⁶ Paragon: *KXT Market + Lifegroup + Member Study, 2020*

Case Studies

Below, we summarize the key findings from two specific studies reviewed for this analysis. These particular studies are highlighted as an opportunity to showcase instances in which public radio stations were able to take action on what they had learned about their audiences and apply solutions to address their challenges. These case studies also uniquely highlight successful strategies for reaching younger and more racially or ethnically diverse listeners.



Boots on the Ground and Investment in Social Marketing

Louisville Public Media (Louisville, KY)

During a first round of focus group sessions, the team at Louisville Public Media (LPM) received a clear and resounding mandate: Members of Louisville’s Black community desired content that was compassionate, uplifting, accurate, and problem-solving, offered by reporters that were from their community and were invested in their community. Awareness of LPM, National Public Radio, and WFPL in the Black community of Louisville lagged behind that of the general population, with many members of the community left feeling wary of stories from reporters who were not connected to or from their community. Content consumption habits were also at odds with the types of content LPM usually produced, with community members favoring the type of live visual news that they could access on their phones through the use of social media—particularly Facebook and Instagram.

With the goal of incorporating this feedback from focus group participants into new content produced for and with the Black community of Louisville, Louisville Public Media staff and contractors set out to create content in both new and current formats—both video and audio reporting—allocating parts of their marketing budget to boost engagement among their target demographic by distributing on social platforms “where they are already showing up.”

As a part of this endeavor, LPM hired content producer and videographer Ty Lancaster, who during his short contract with LPM produced 10 video prototypes that were shown to a second round of focus groups. His videos ranged in topic from local restaurant openings to highlighting the work of community-based non-profit organizations. LPM leveraged both Facebook and Instagram stories and reels to test where they would get the most traction and used GNI marketing funds to boost video posts to their target audience. On

average LPM spent less than \$200 per video, but the videos resulted in an average reach of 36,000 views per video with an average of more than 12,000 through plays per video, for an average cost of around \$0.56 per impression.

Capitalizing on these learnings, from July to November 2021, LPM promoted a wide variety of LPM content including WFPL reporting to their target audience of Black Louisvillians, in an effort to increase brand awareness, engagement, and reach. Stories were selected especially if they directly impacted the Black community from specific neighborhoods being targeted, as well as stories that received interest in the focus groups. As a result, they generated an average reach of 7,000 individuals and 700 engagements per post.

In conjunction with this new social media strategy, LPM also partnered with local organizations to host in-person events. They partnered with 1A's Remaking America to host an event in West Louisville that focused on spotlighting the voices of high school students, encouraging them to share their voices and promote change on their own terms. LPM encouraged newsroom staff to attend these events in the community, and overall, LPM leadership worked with reporters to set accountability measures for newsroom staff to regularly attend events and interview sources in the West End. The success of this experiment underscores the reality that simple investments in a community-centered strategy can add value to an organization that goes far beyond serving simply as content producers. With boots on the ground in local communities across the United States, Public radio stations are well positioned to not only create content that resonates within their local communities but to participate and promote the types of change our communities need.

Public radio stations are well positioned to not only create content that resonates within their local communities but to participate and promote the types of change our communities need.



Taking Another Listen: Making Classical Music More Welcoming

Classical KING, WQXR, WRTI, KUCO (Seattle, NYC, Oklahoma City)

In an effort to learn more about the relationship that Black, Indigenous, and People of Color have with classical music, Classical KING teamed up with WQXR, WRTI, KUCO, and research firm Slover Linett to conduct a study around how classical radio may need to rethink, experiment, and evolve in order to develop deeper relationships with listeners of color. While past studies supported the belief that people who listen to classical music radio and who attend live classical music performances were disproportionately White (consistent with the genre's European origins), the KING study showed that race and ethnicity are not key factors in determining who listens to classical music.

In fact, the KING study indicates that across racial and ethnic groups, people listen to classical music at relatively similar rates. Overall, the study found that self-reported race and ethnicity explain less than 4% of the variance in classical music listening. While classical music had historically been marketed to a narrow audience, data from the study showed that the genre, in fact, had a much broader appeal. The majority of respondents in the study, regardless of racial or ethnic identification, had neutral or positive opinions of classical music. While most existing research had focused on audience consumption and attendance related solely to the classical genre, the KING study showed that most people listened to classical music as a part of a broader musical landscape, meaning that those who do listen to classical music are interested in a wide range of genres as well.

The study found that self-reported race and ethnicity explain less than 4% of the variance in classical music listening.

Additionally, the KING study found that while programming and performance of classical music have focused on a very narrow definition of the genre, among the general public, there is little agreement on what actually constitutes "classical music." Traditional definitions of the genre centered around the work of famous European composers, such as Beethoven or Mozart. However, this understanding omits the modern understanding of classical music that can include categories like instrumental music composed in recent years, or modern remixes of music written by composers of the past. Therefore, the perception of classical music may be broader than the narrow range of music that classical stations may be playing.

The study outlined five potential directions for change. The first direction centers around bringing classical music to where people are. This urges stakeholders to think beyond programming and extend creatively into other platforms and settings such as live performances. While the study acknowledges that this process may involve shedding some cherished ideas in the field and defining a new, multi-mode identity and presence, this approach would represent a data-informed strategy designed to reach younger BIPOC audiences.

The second direction involves highlighting classical music's modern evolution beyond its narrow European origins, combatting the widespread perception that classical music is stuck in the past. In service of providing audiences with greater representation, this approach suggests promoting a more contemporary and historically-accurate picture of classical music that would highlight the past and present contributions to the art form by people from a wide range of backgrounds and geographies.

The third and fourth directions involve highlighting classical music's relevance by emphasizing its contemporary connections, with the fourth direction suggesting that breaking away from traditional classical radio hosts can help the genre connect to the energy and passion of younger and more diverse audiences. This suggestion is well-aligned with the fifth and final direction that emphasizes the importance of classical radio embracing a mood. A key finding of the KING research was that listeners often select their music from a "menu of moods." Since classical music is often composed in a way to evoke particular emotions, classical music lends itself well to this trend of "mood setting." By broadening narrow definitions of genres, the KING research suggests that public radio can appeal to broader audiences.

Bibliography

Works Cited

Corona Insights. 2022a. "Young Residents of Color in Northern Colorado: Listening Habits, Desires, and Perceptions of Radio."

Corona Insights. 2022b. "Residents of CRNC Key Geography: Attitudes Toward State & Local Media."

Jacobs Media. 2021b. "Michigan Radio Focus Group Report."

Jacobs Media. 2022. "The State of Public Radio in Post-Pandemic America."

Louisville Public Media. 2023. "Amplifying Marginalized Voices; to Build a Better Louisville."

Magid. 2023. "KCUR Research Takeaways."

Paragon, 2020b. "Nashville Public Radio Market + Lifegroup + Member Study."

Paragon, . 2021b. "KERA News Lifegroup Study."

Paragon, 2019. " Colorado Public Radio Local News Lifegroup Study."

Paragon, 2020. "Indie 102.3 Market + Lifegroup + Member Study."

Paragon, 2020c. "KXT Market + Lifegroup + Member Study."

Paragon, 2022. " KUTX Triple A Lifegroup + Member Study."

Paragon,. 2020a. "Nashville Public Radio Market + Lifegroup + Member Study; Executive Summary."

Paragon,. 2022b. "CapRadio News Lifegroup + Member Study."

Research Narrative, Inc. 2021. "WHYY Audience Development and Strategy Focus Group Research Report – Executive Summary."

Slover Linett Audience Research. 2023. "Taking Another Listen: Audience research with people of color to help make classical music radio more welcoming."

Smith Geiger Group. 2022. "New England News Collaborative: Audience Needs and Behaviors Research."

Other Related Studies

"Long & Short of it." 2020. "IdeaStream: Segmentation Summary."

Egg Strategy. 2022. "Vermont PBS/ VPR; Segmentation: Prioritizing Vermont Audiences."

Jacobs Media. 2021a. "Listener Survey Key Research Findings."

Maine Public through the Google News Initiative n.d. "Transformational Audience Research and Engagement: A Measurement Tool for Public Broadcasting."

Paragon, 2021a. "KUT News Lifegroup Study."

Paragon, 2021c. "KERA, KUT, Houston Public Media News Lifegroup Study Market Comparison."

Paragon, 2022a. "Iowa Public Radio News Lifegroup + Member Study."

Paragon. n.d. "KUHF Opportunities & Threats."

Resonate. 2023. "Rocky Mountain PBS Resonate Analysis."

City Square Associates, Inc.

402 Cambridge St.
Cambridge MA, 02141
citysquareassociates.com



CITY SQUARE

A S S O C I A T E S

Data. Meaning. Action.