

Public Radio's Pathway Through the Pandemic

JACOBS MEDIA
COVID-19
SURVEY 2

Jacobs
media strategies

PRPD 

Public Radio
May 2020

Methodology

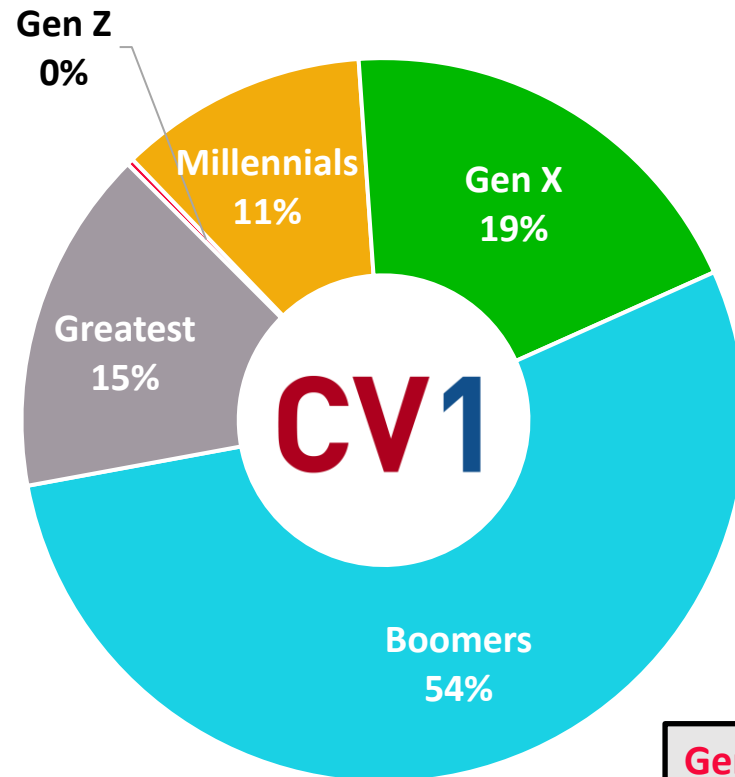
- 47 public radio stations in the United States
 - Separate Commercial Radio and Christian Music Radio surveys also fielded concurrently
- N = 15,345
- Interview dates: May 12 – May 14, 2020 – a “snapshot” of this point in time
 - Follow-up to CV1 public radio survey conducted March 31 – April 2, 2020
- News/Talk 27, Classical 10, AAA 7, Other/Jazz 3
- Most respondents are members of radio station databases. 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.



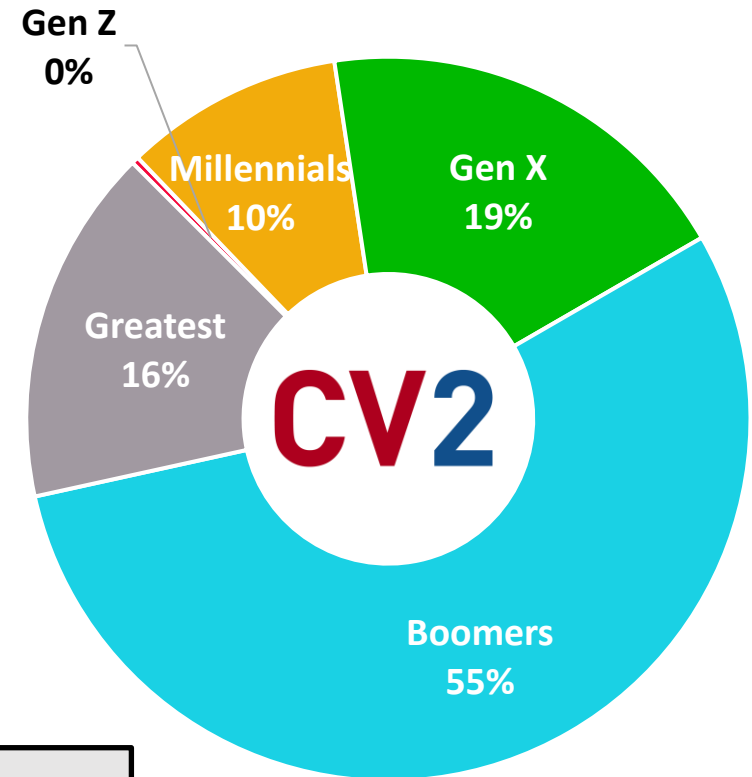
Who They Are

Who Participated? Generations

April 2020



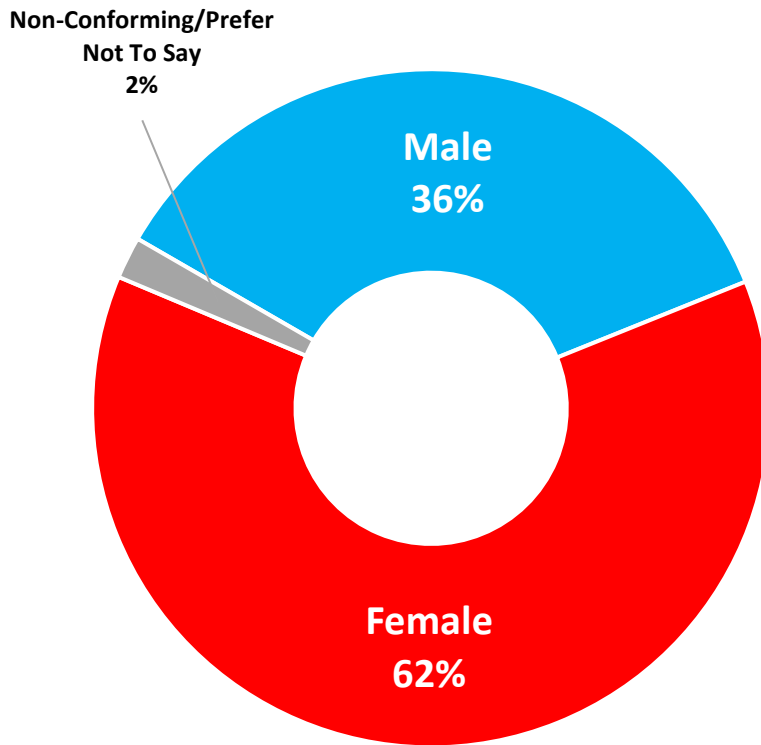
May 2020



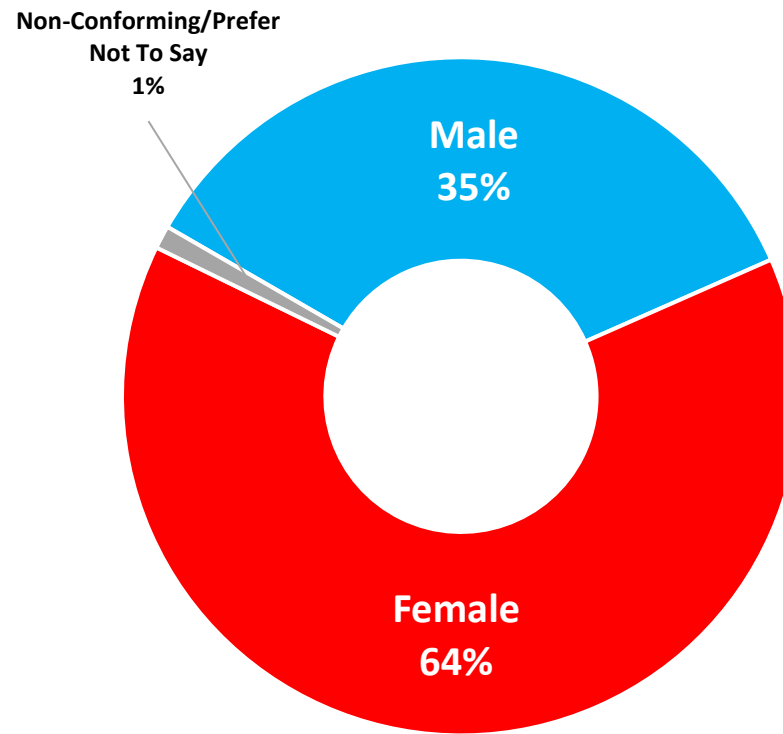
Gen Z (born after 1996)
Millennials (born between 1981-1996)
Gen X (born between 1965-1980)
Baby Boomer (born between 1946-64)
Greatest Generation (born before 1946)

Who Participated? Gender

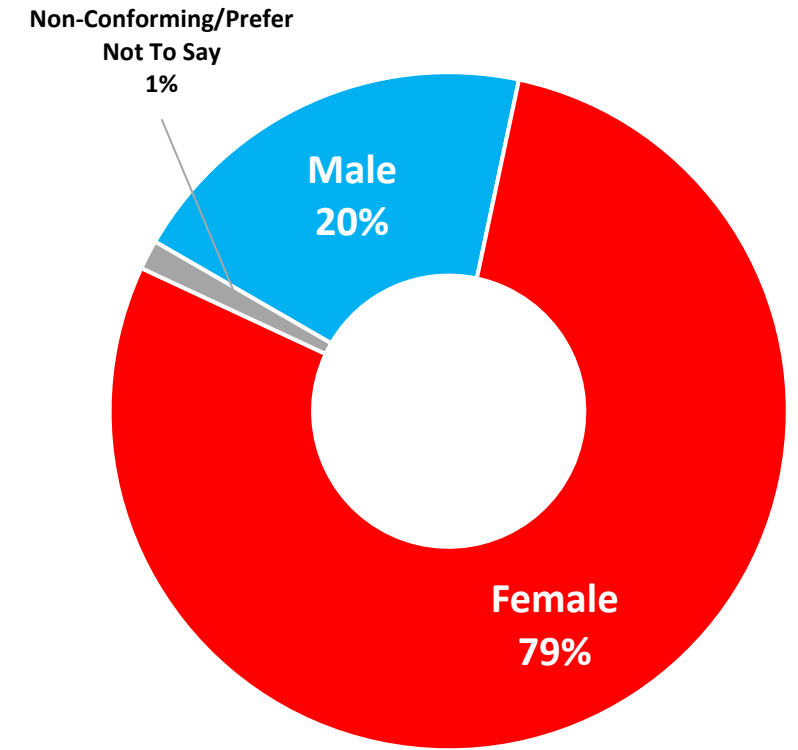
Public Radio



Commercial Radio

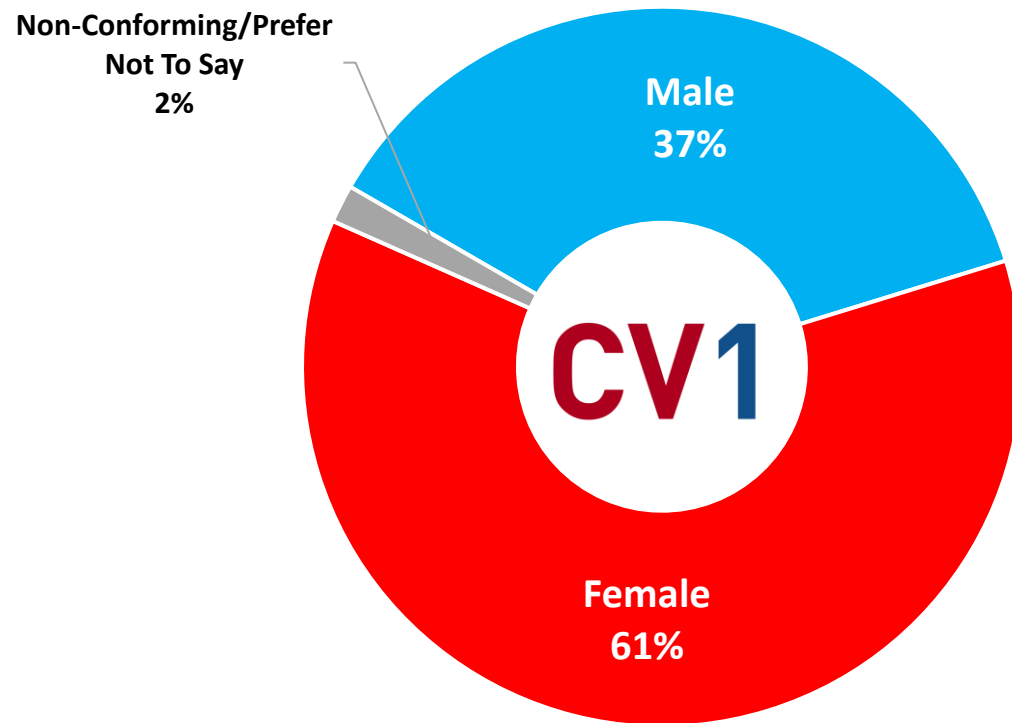


Christian Music Radio

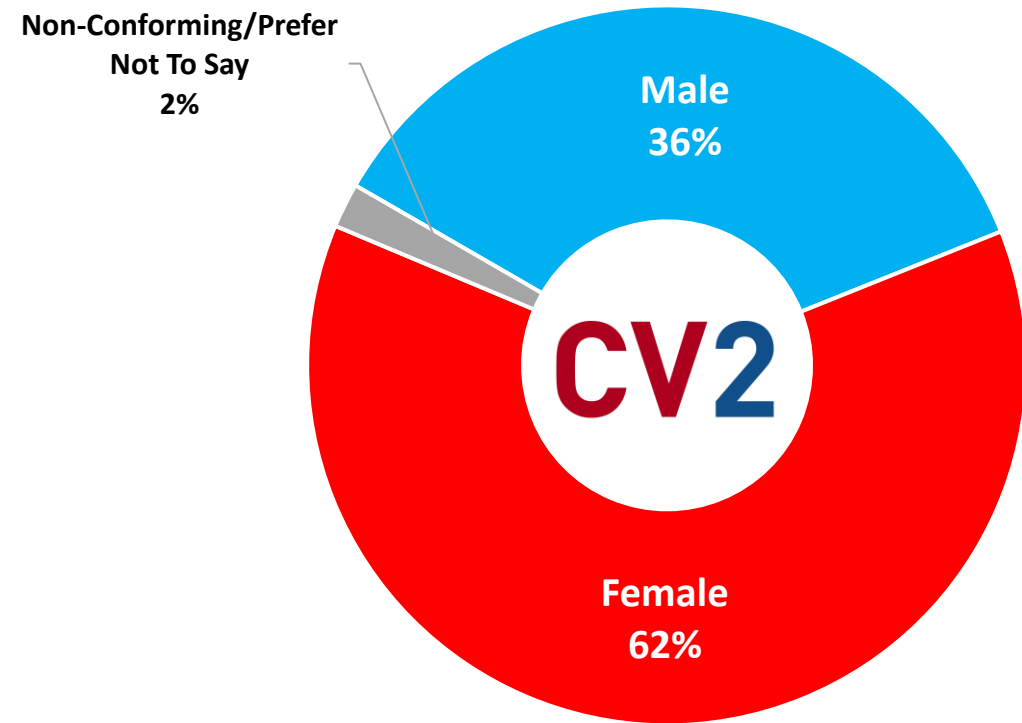


Who Participated? Gender

April 2020

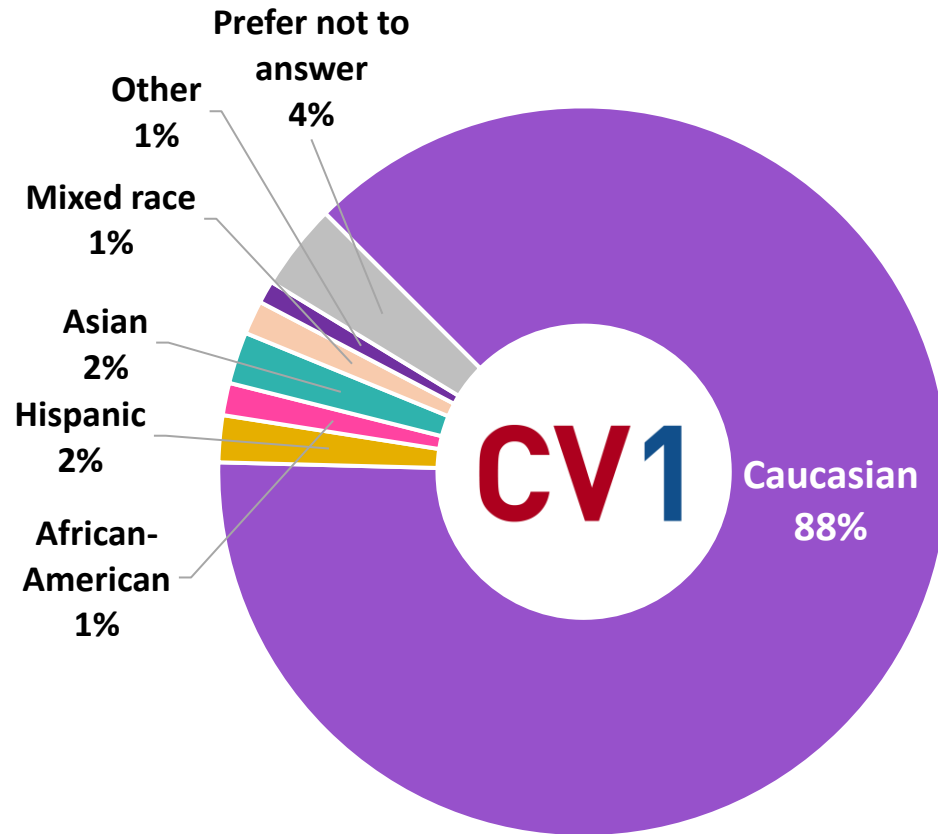


May 2020

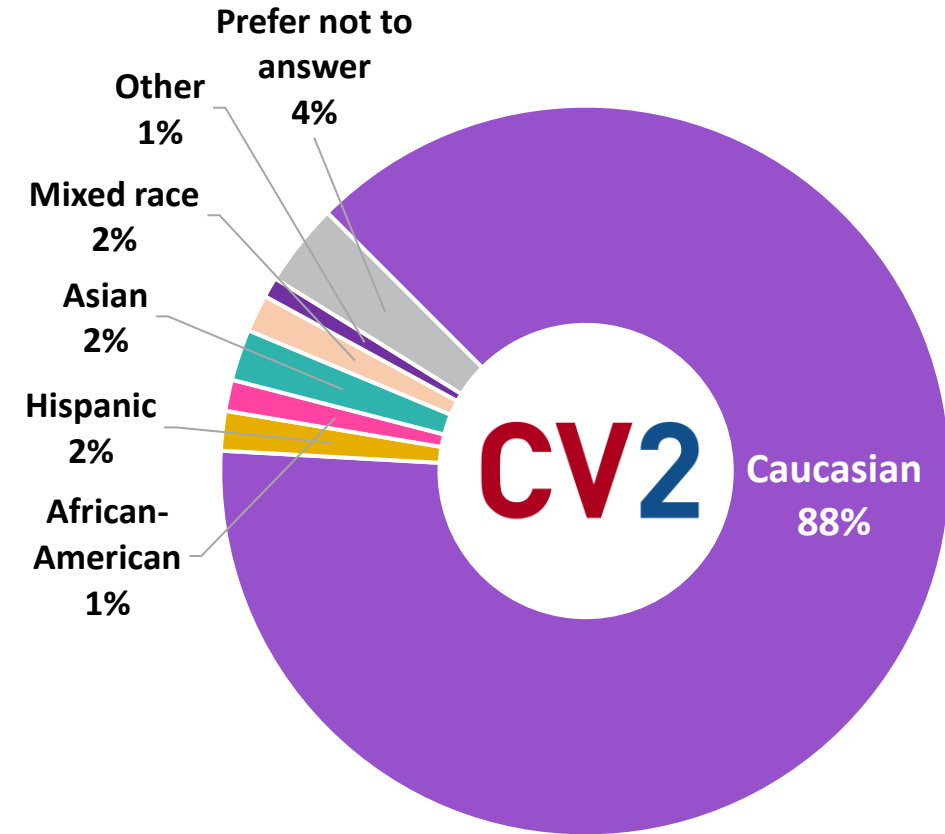


Who Participated? Ethnicity

April 2020

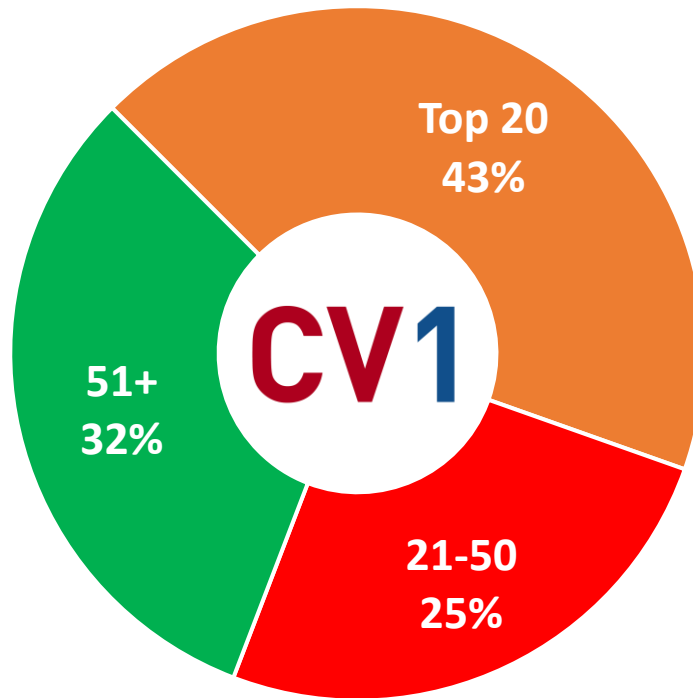


May 2020

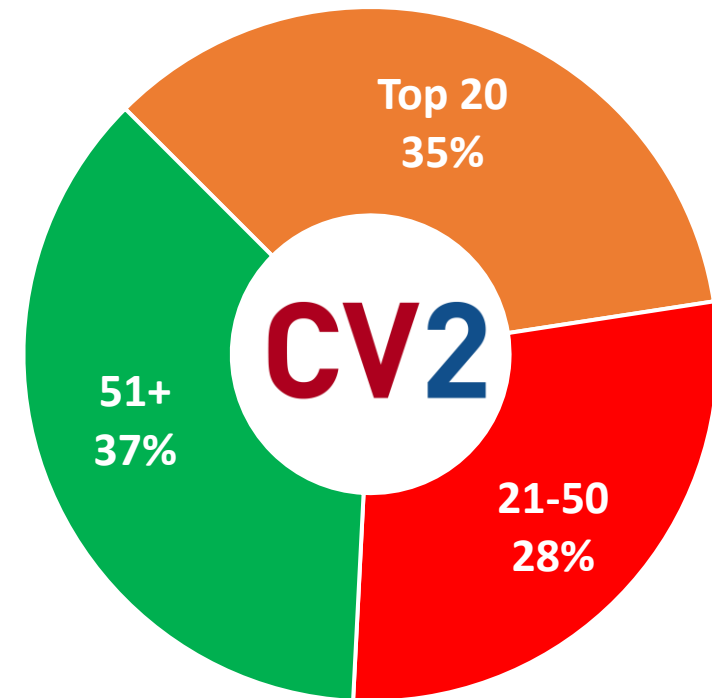


Where Do Respondents Live? Market Size

April 2020

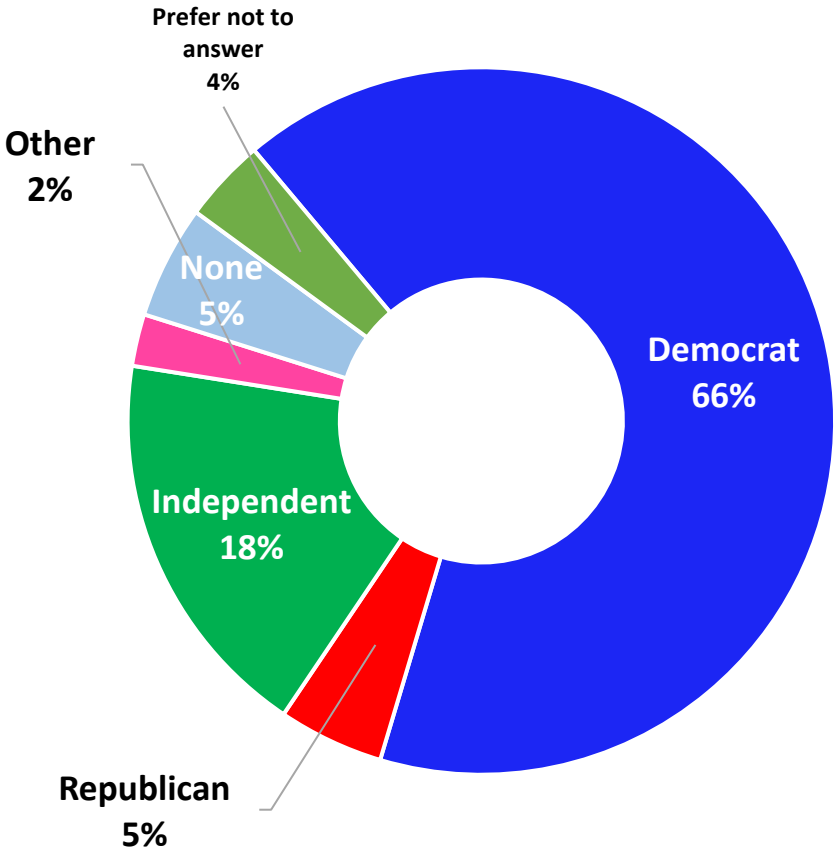


May 2020

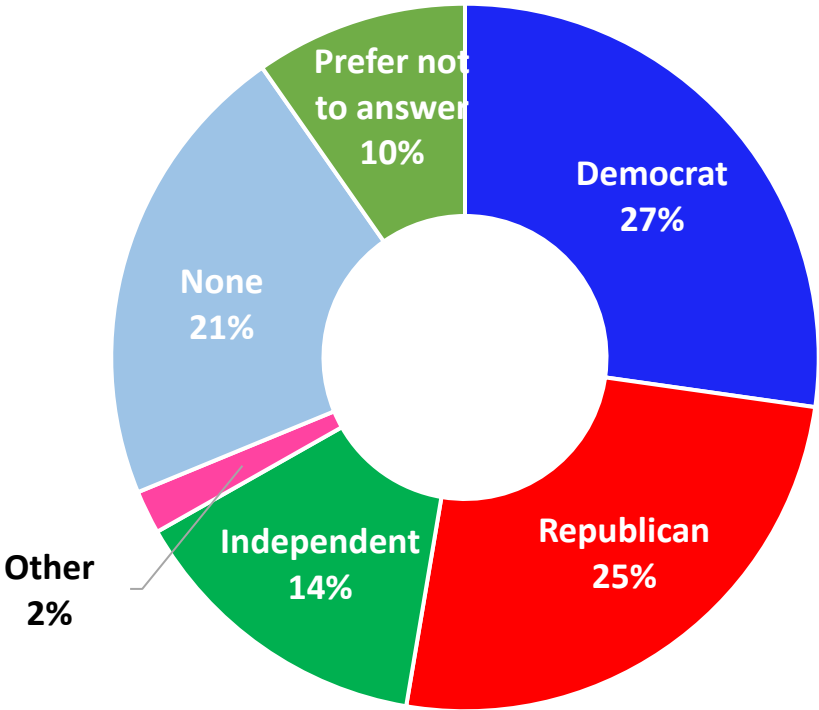


Who Participated? Political Party Preference

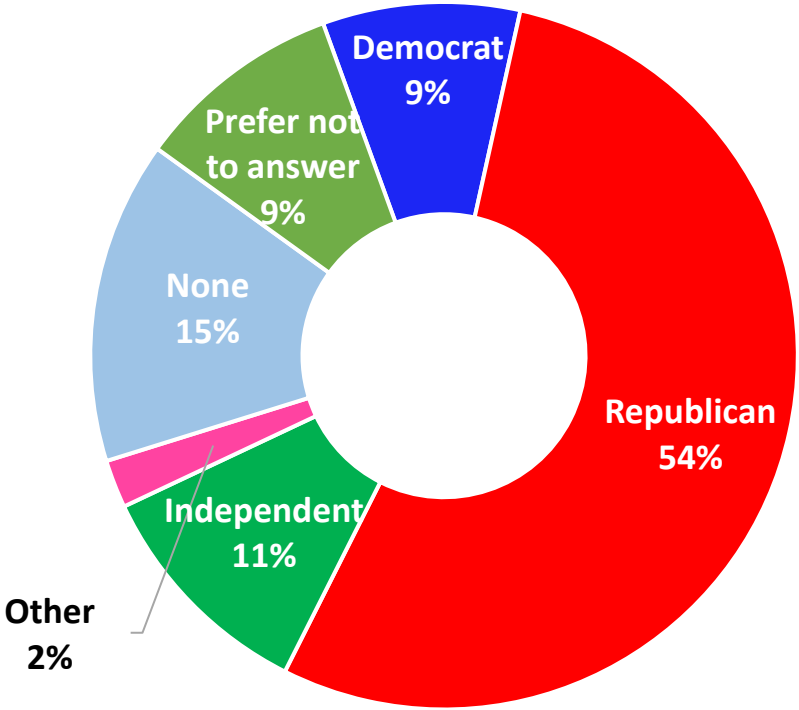
Public Radio



Commercial Radio



Christian Music Radio



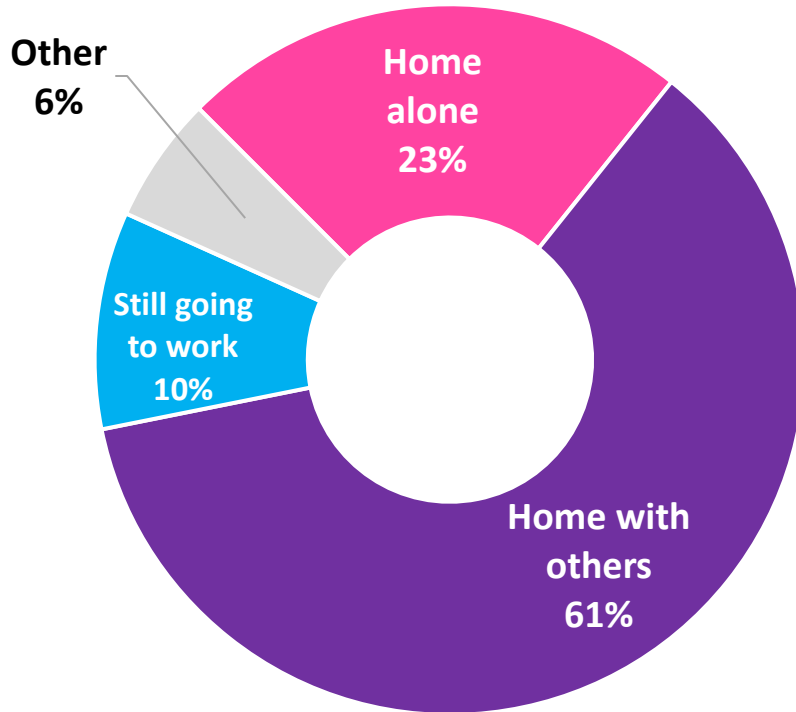
Among U.S. respondents



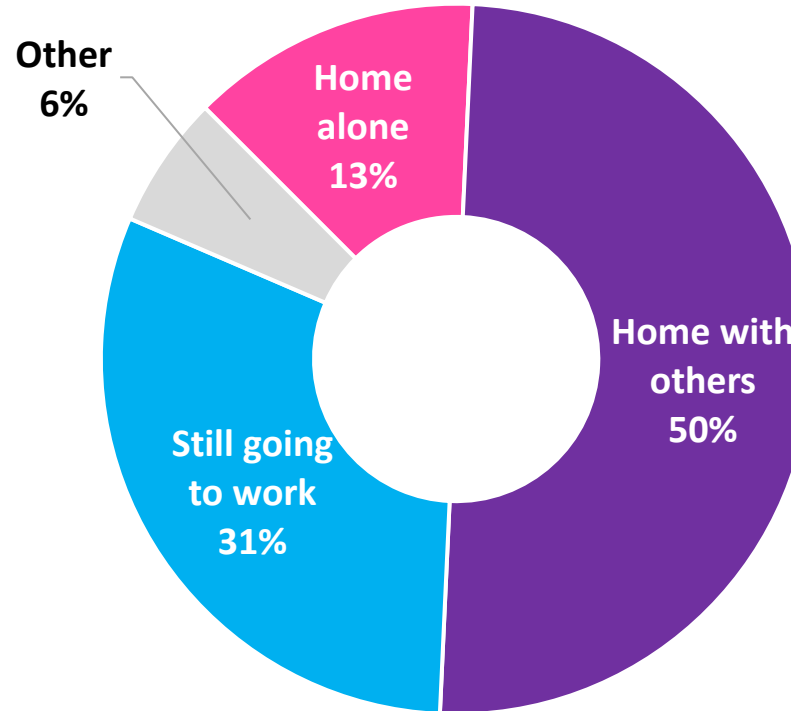
Where They Are

More Than Eight in Ten Public Radio Listeners Are At Home

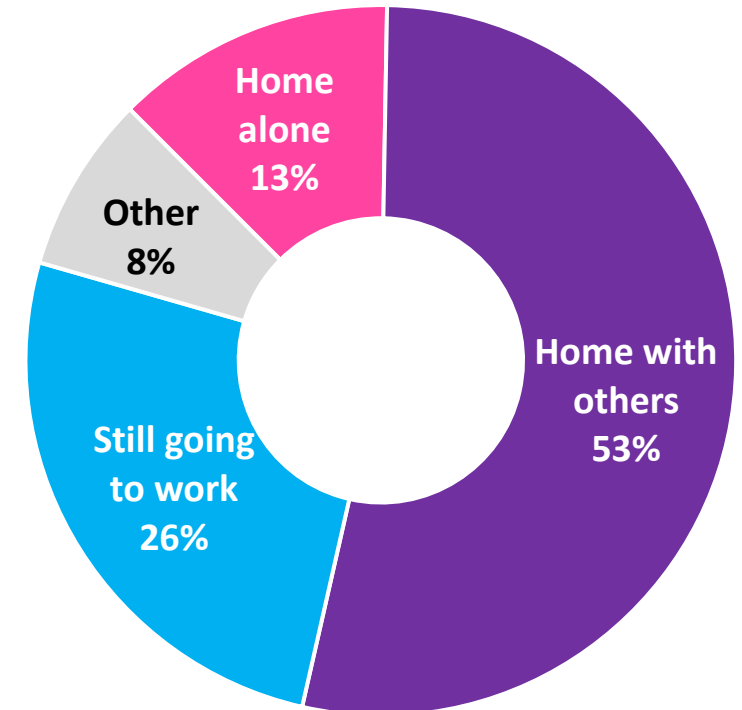
Public Radio



Commercial Radio

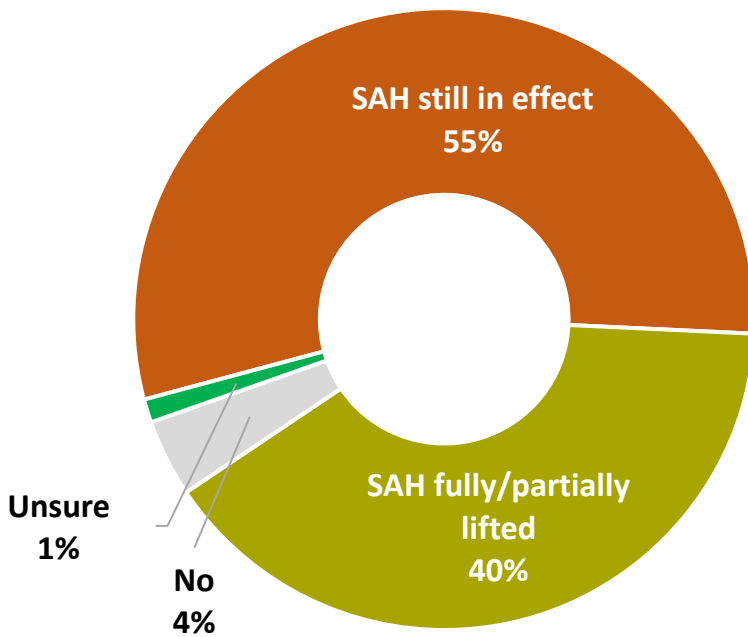


Christian Music Radio

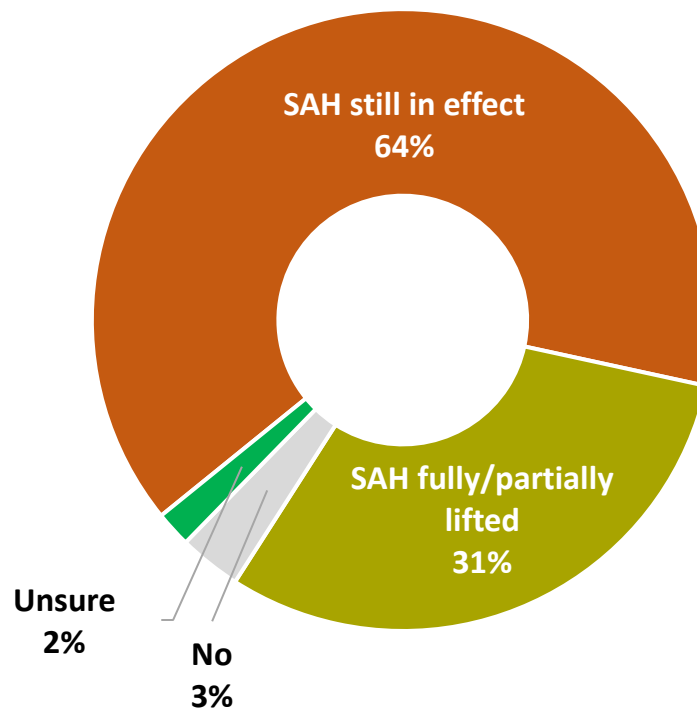


Four in Ten Public Radio Listeners Live in a State/City With a Fully/Partially Lifted “Stay at Home” Order

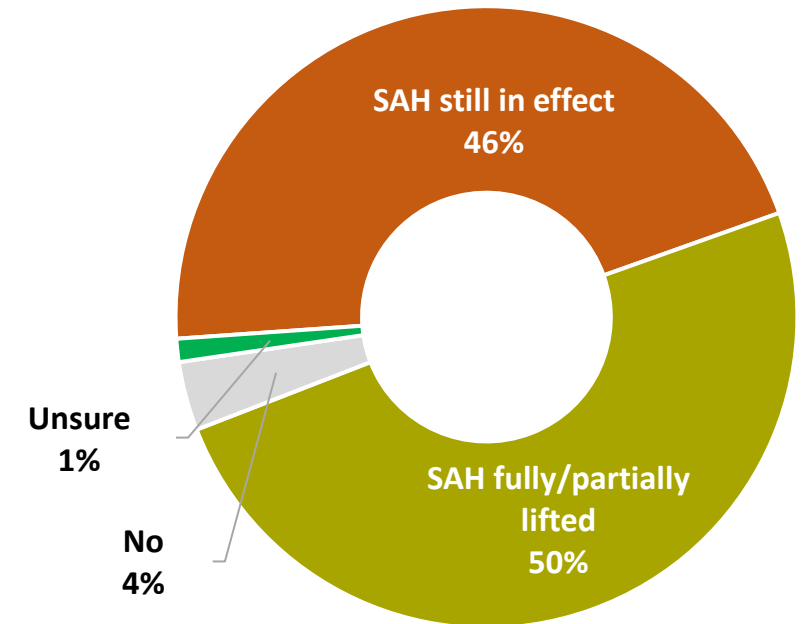
Public Radio



Commercial Radio



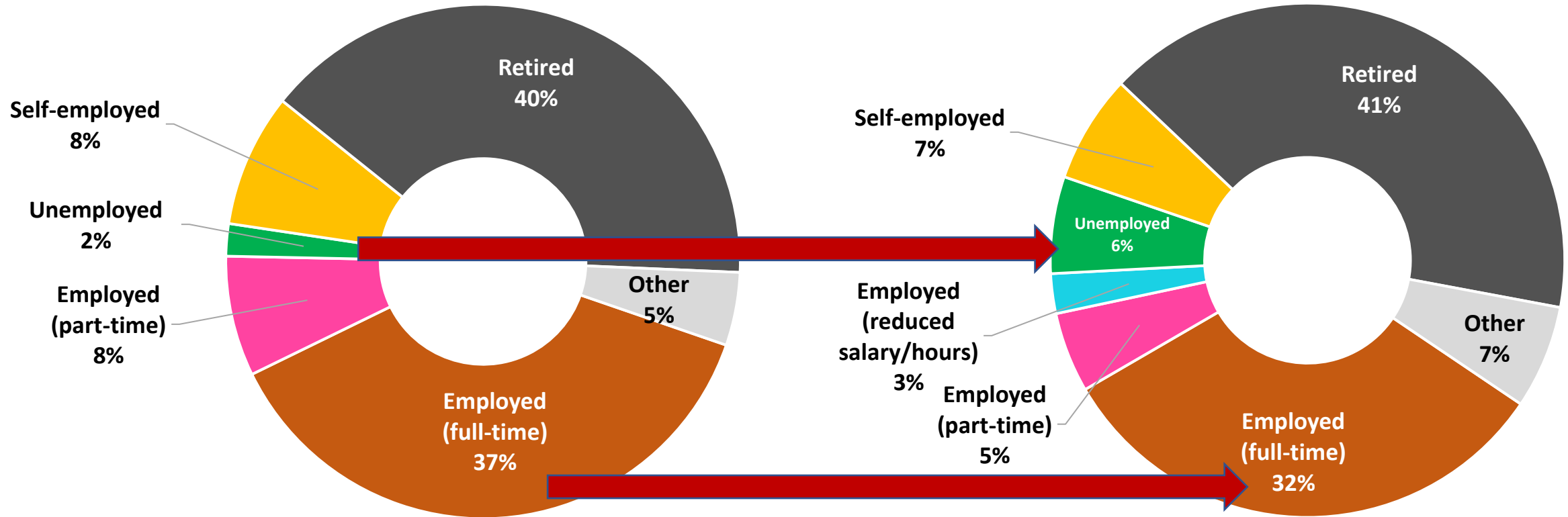
Christian Music Radio



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

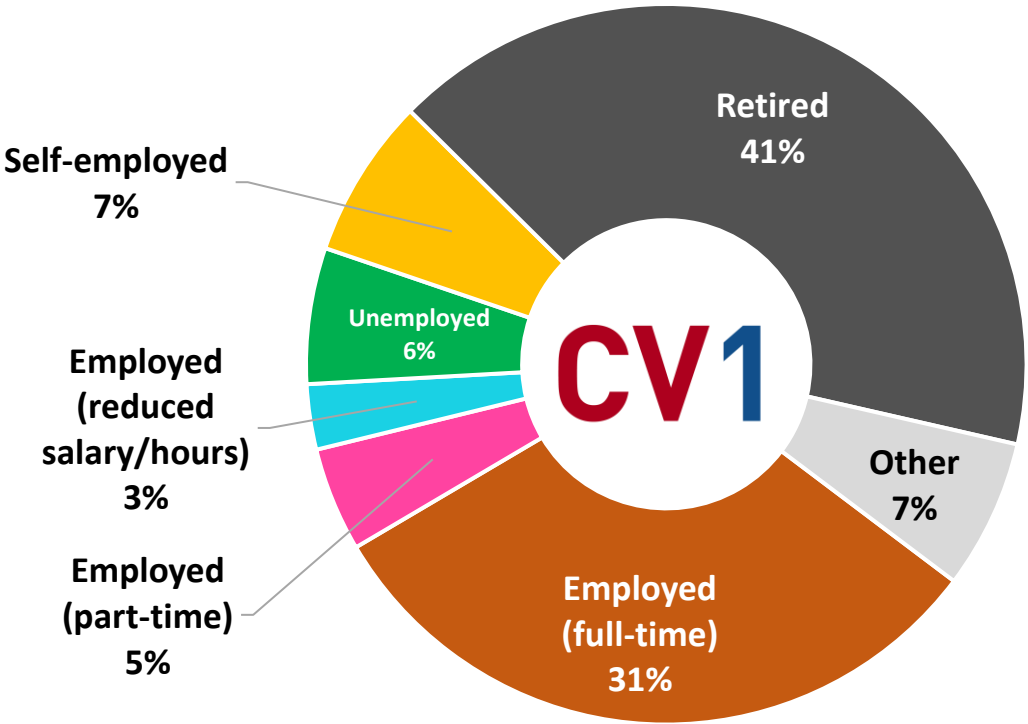
BEFORE Coronavirus Outbreak

Current Employment Status

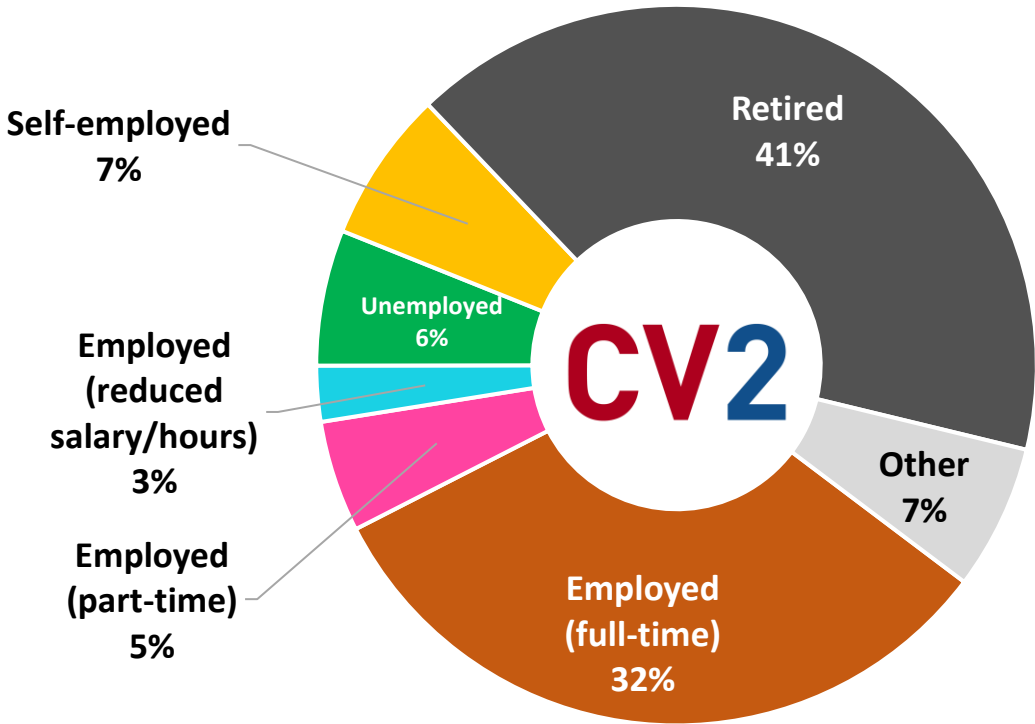


The Most Severe Job Losses Occurred Weeks Ago

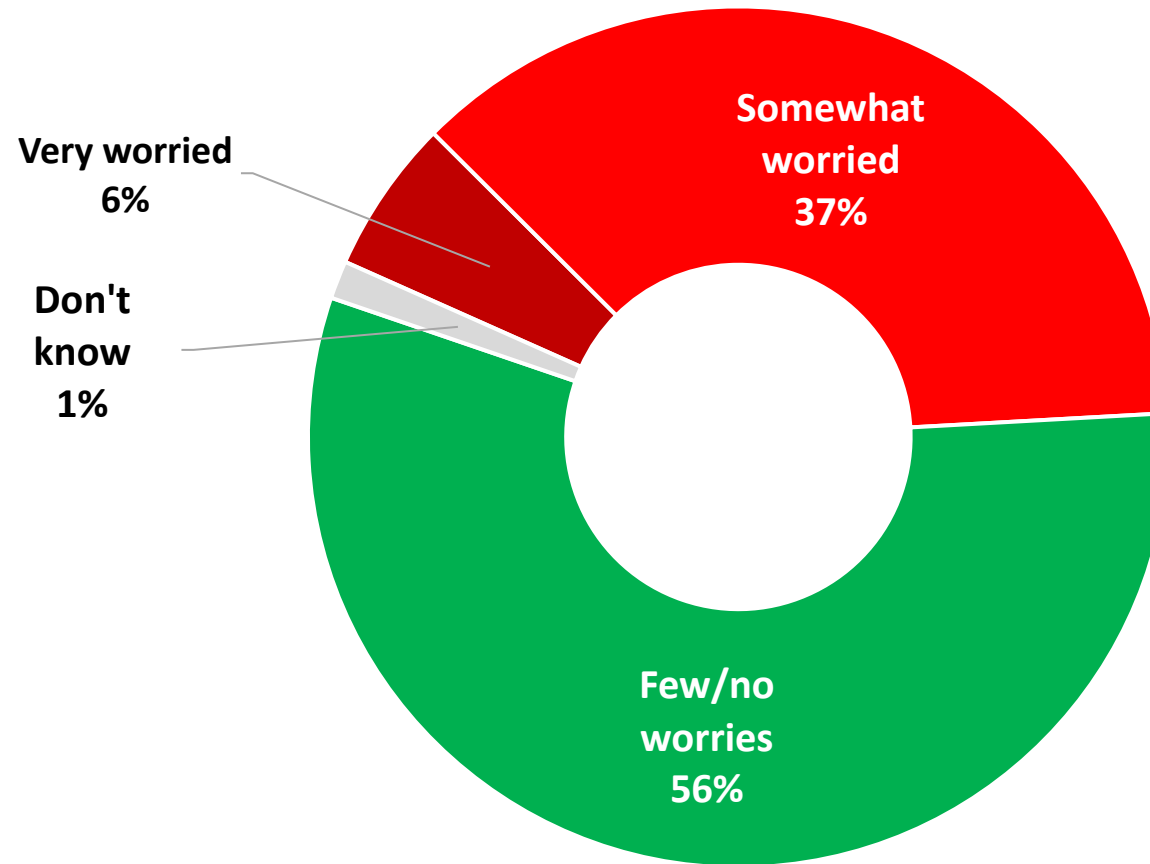
April 2020



May 2020



Among the Employed, More Than Four in Ten Are Worried About Their Job Security

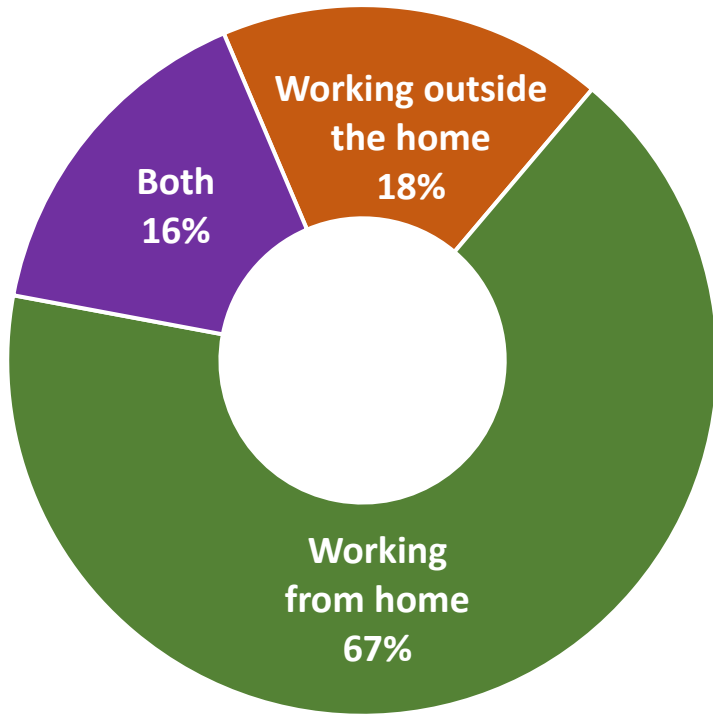




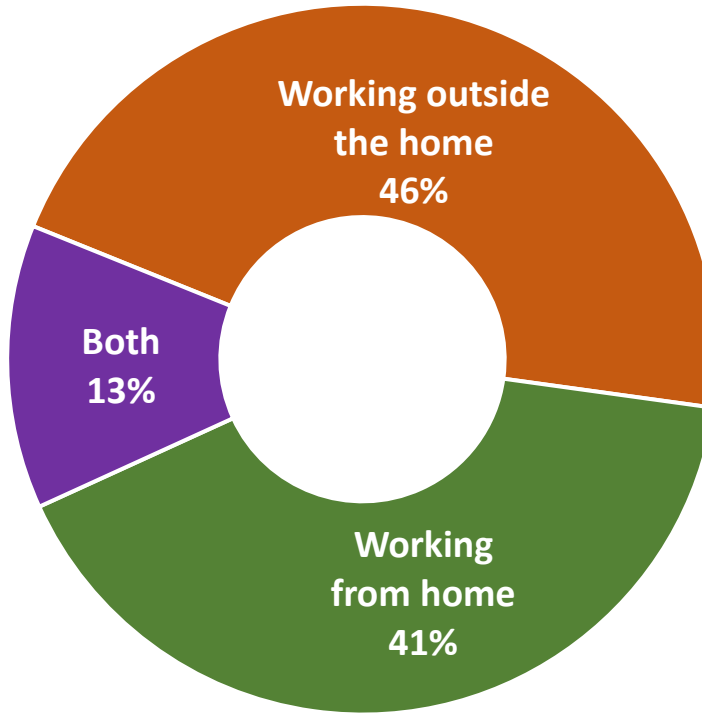
WFH

Among Employed Public Radio Listeners, Most Are Working From Home

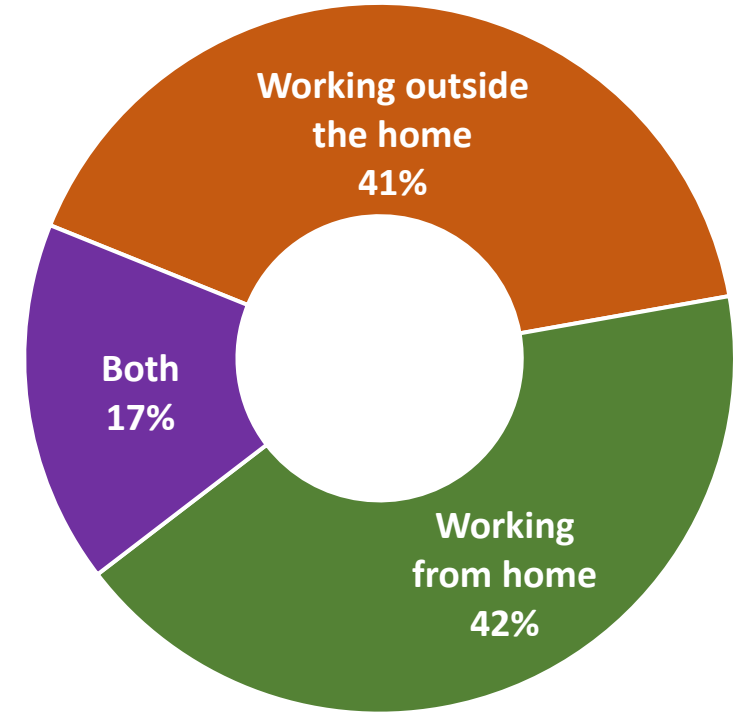
Public Radio



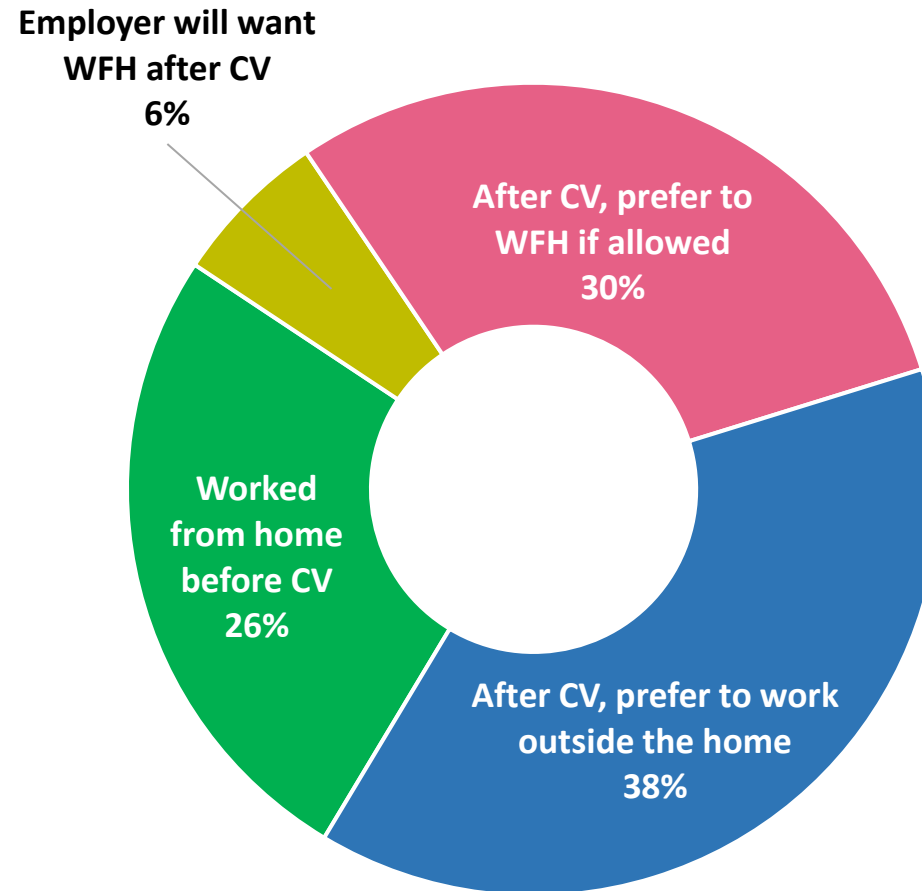
Commercial Radio



Christian Music Radio



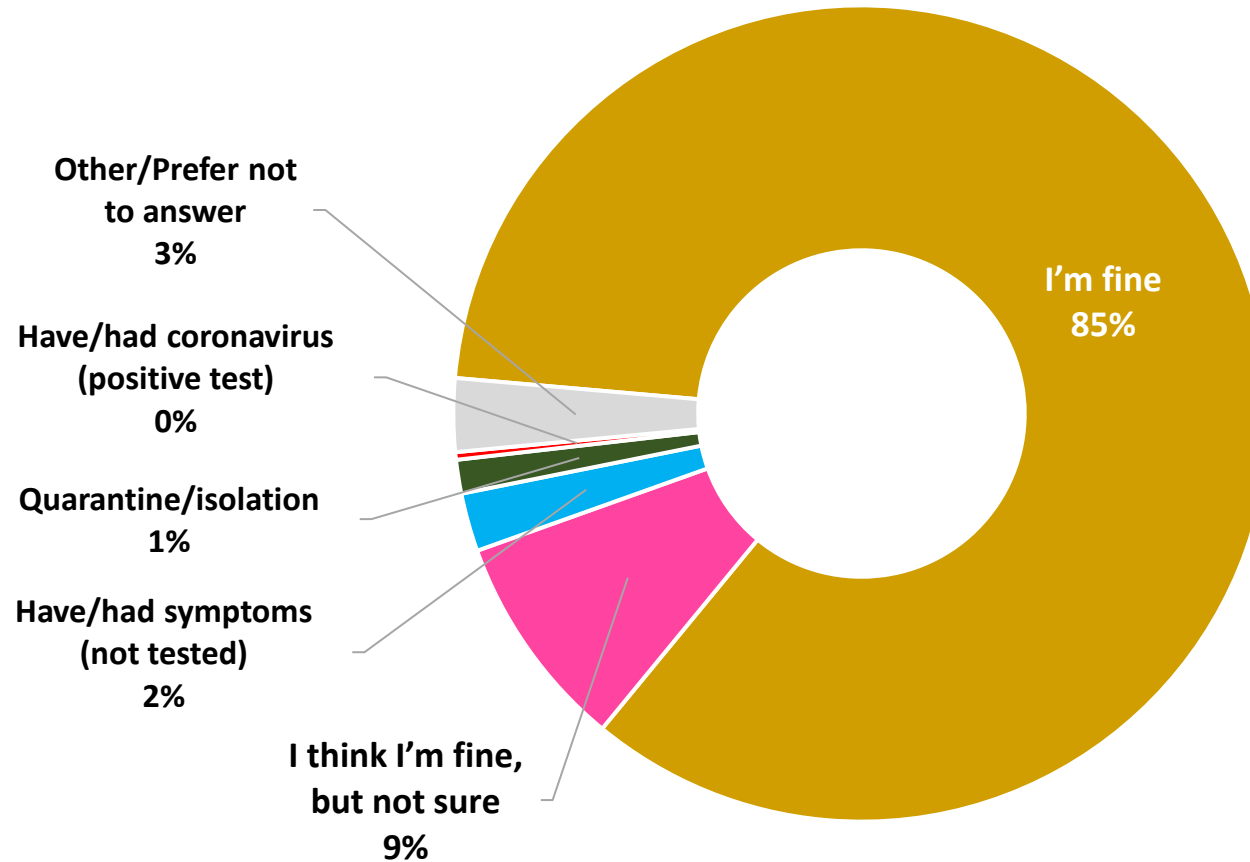
Among Those Employed/Working From Home, Most Will Likely WFH Post-COVID-19





The Public Radio Audience's Mindset

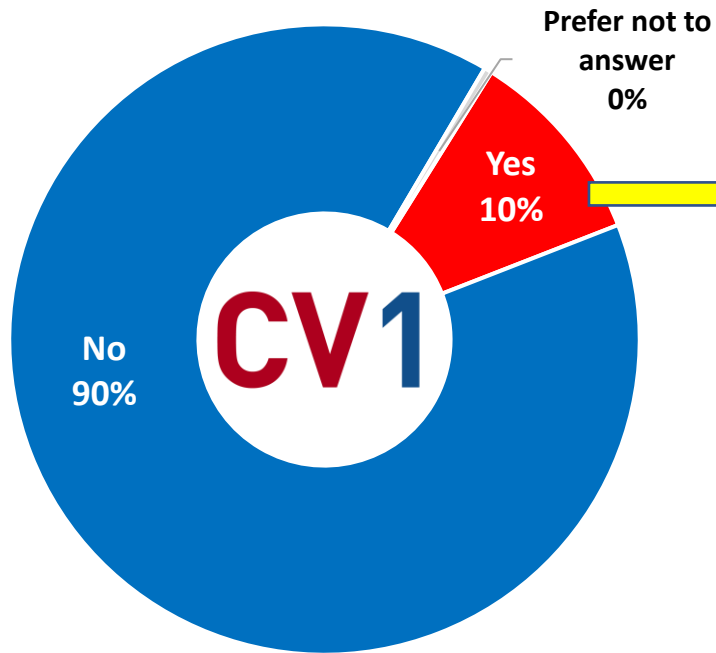
Most Are Feeling Good, But More Than One in Ten Has Had a Positive Test, Symptoms, or Just Aren't So Sure



"What is your current state of health?"

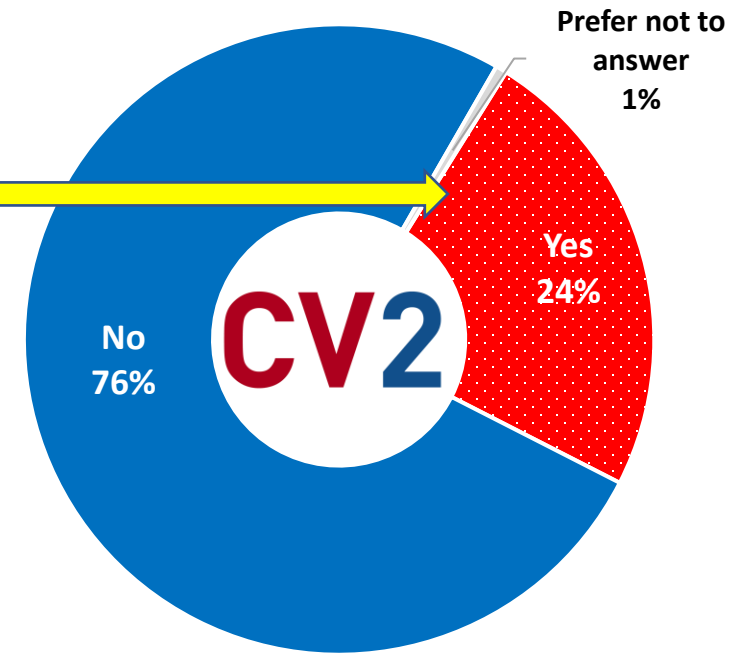
About One in Four Knows Someone Who's Tested Positive or Likely Had COVID-19 – More Than 2X As Much As 6 Weeks Ago

April 2020



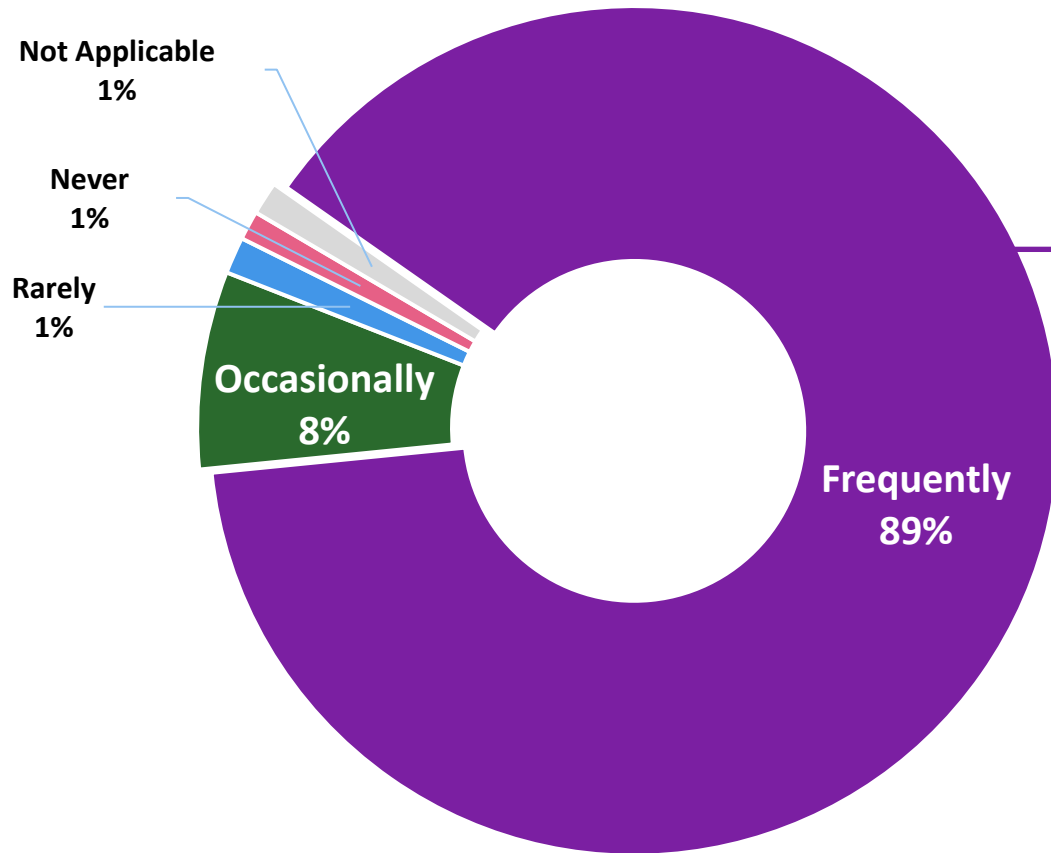
“Do you have any family members, friends or co-workers who have tested positive for coronavirus?”

May 2020

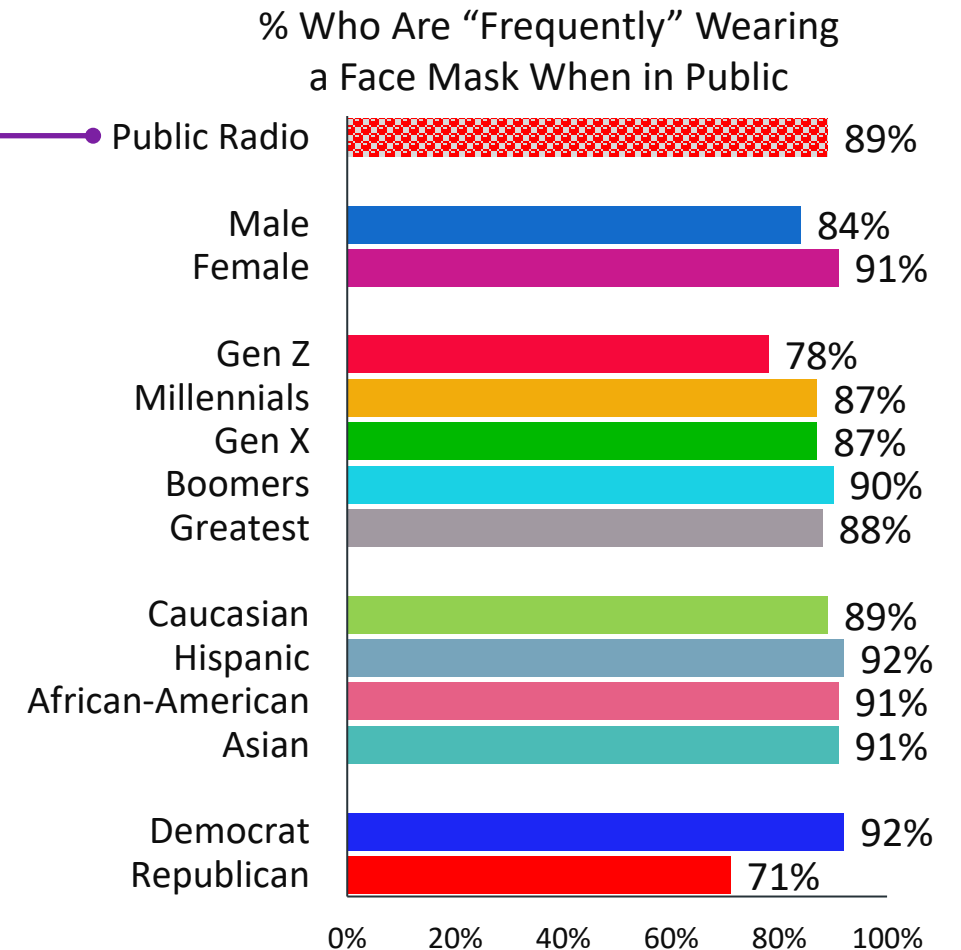


“Do you have any family members, friends or co-workers who have tested positive for coronavirus or are likely to have had coronavirus even though they were not tested?”

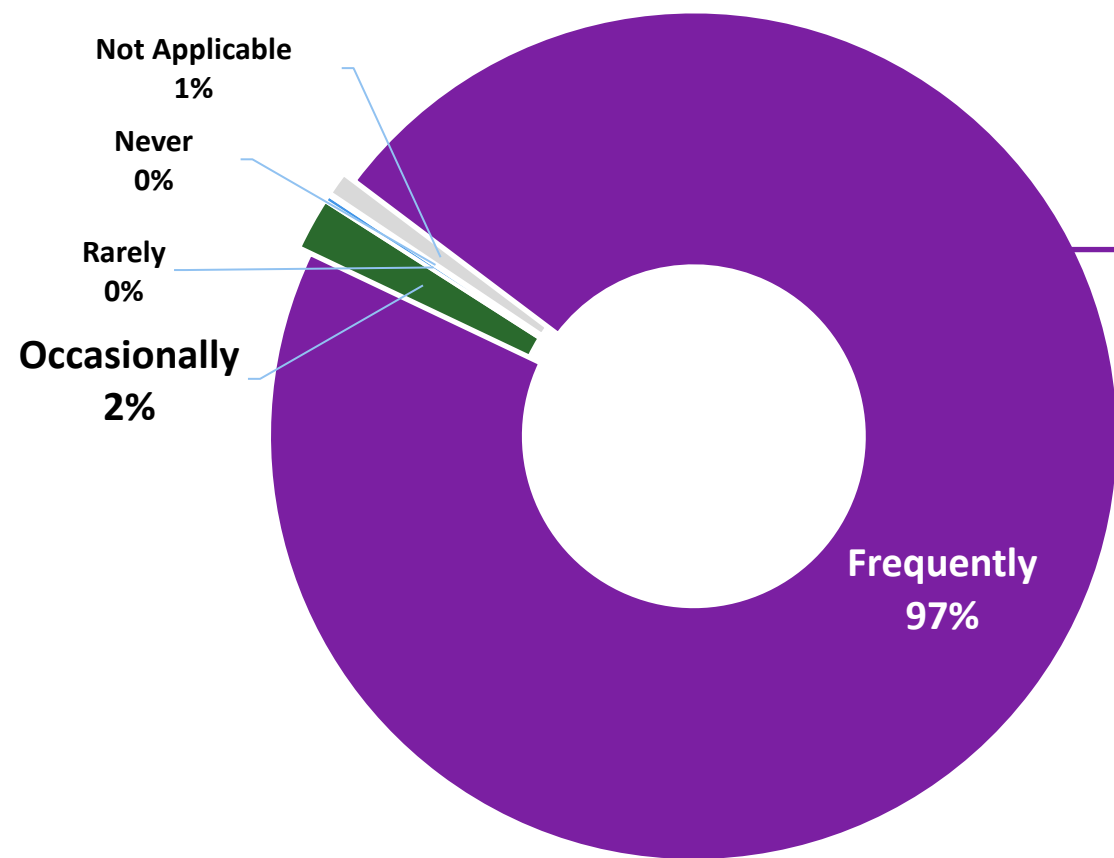
Most Say They Frequently Wear a Face Mask When in Public



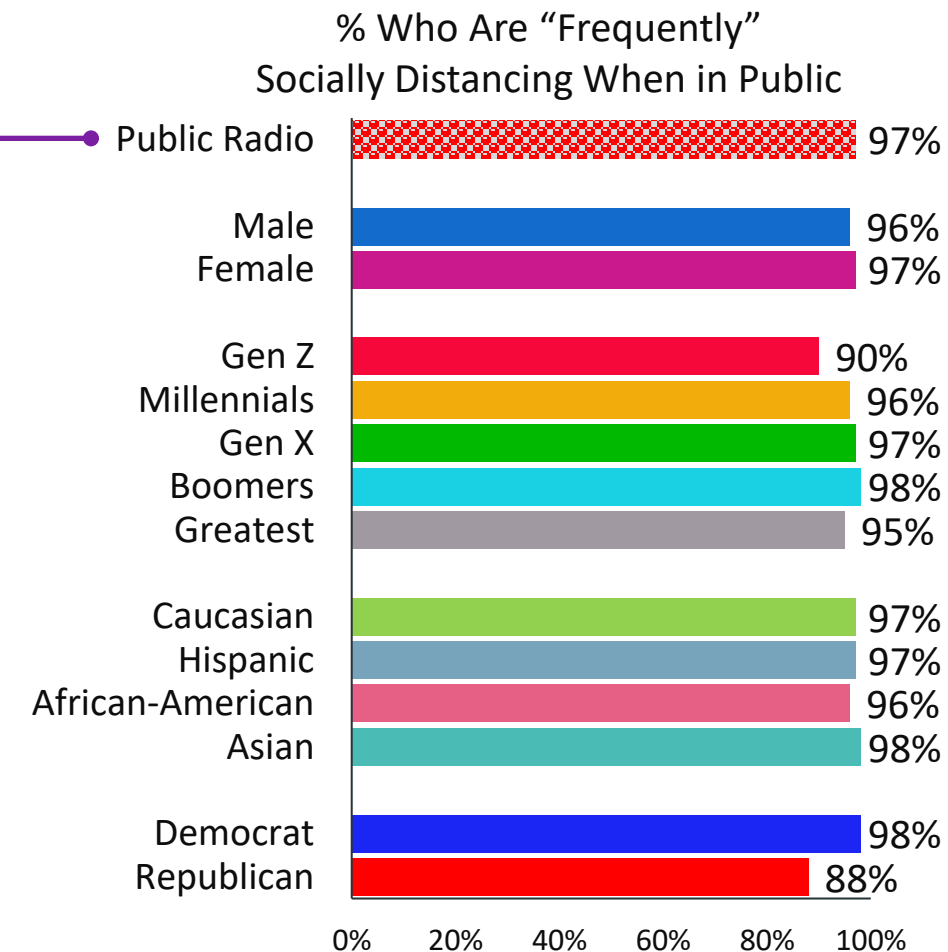
"At this time, how often are you personally wearing a face mask when in public?"



Nearly All Are Frequently Socially Distancing When in Public

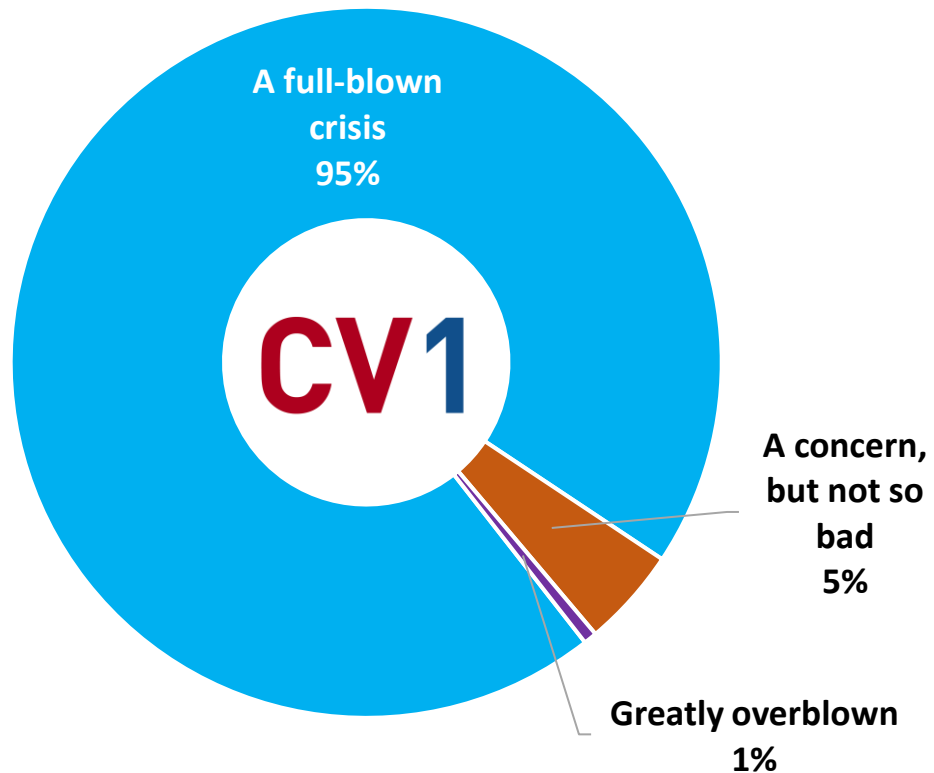


“At this time, how often are you personally maintaining social distancing guidelines when in public?”

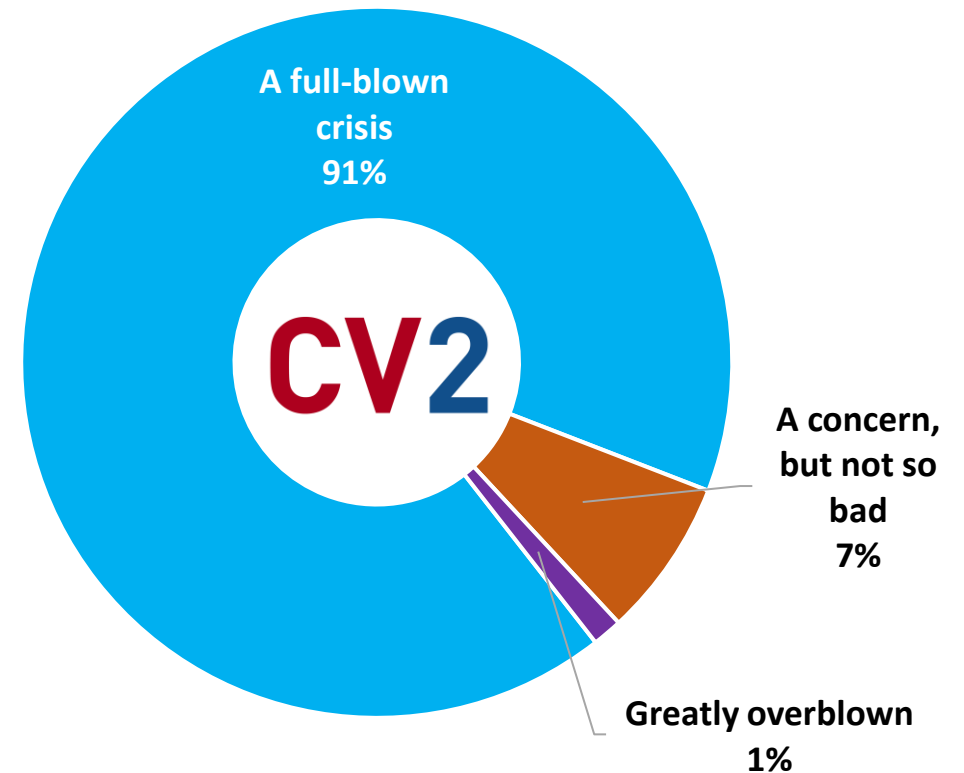


The Coronavirus Outbreak Is Still Seen as a Full-Blown Crisis

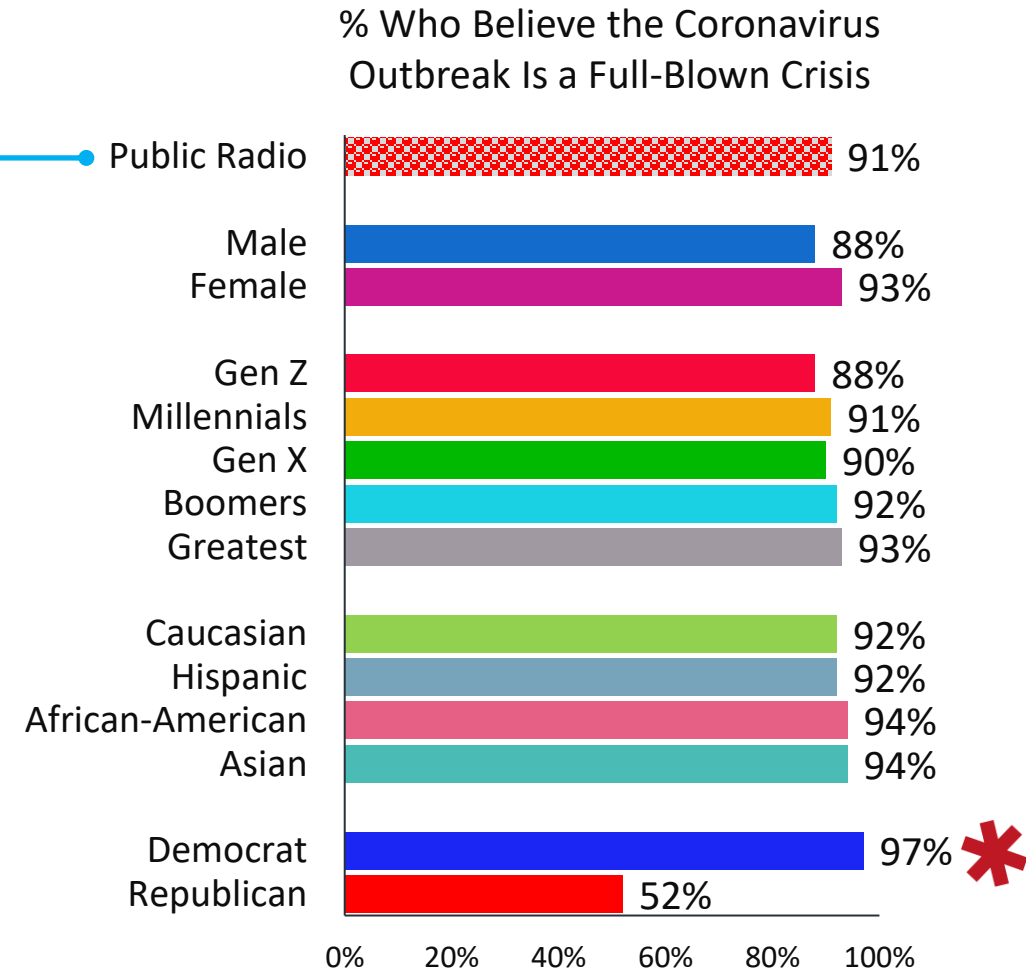
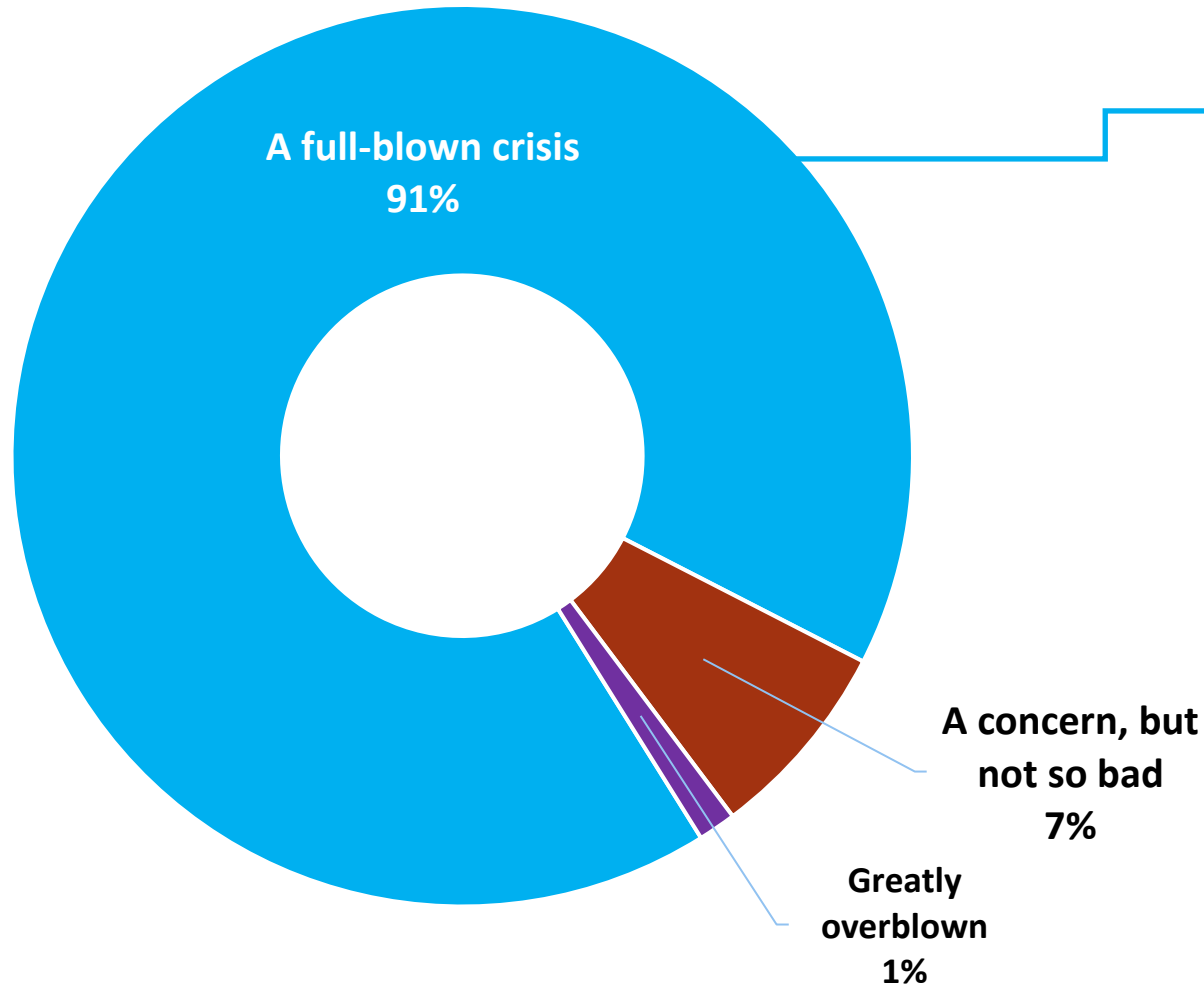
April 2020



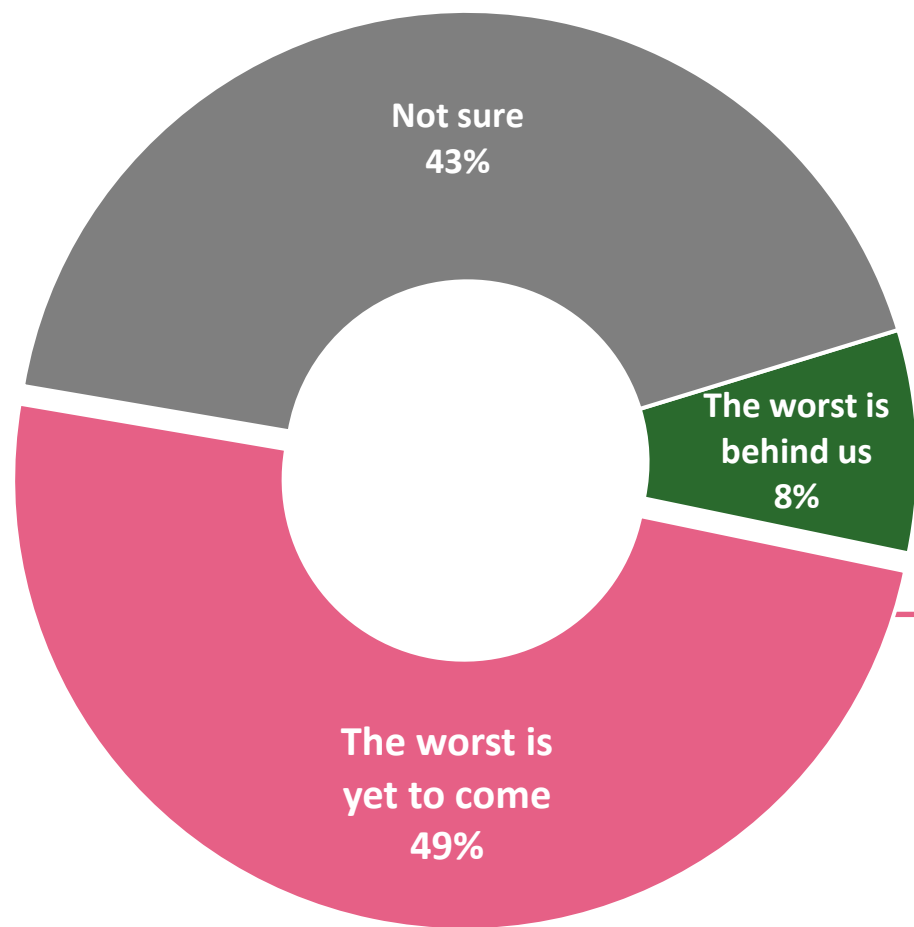
May 2020



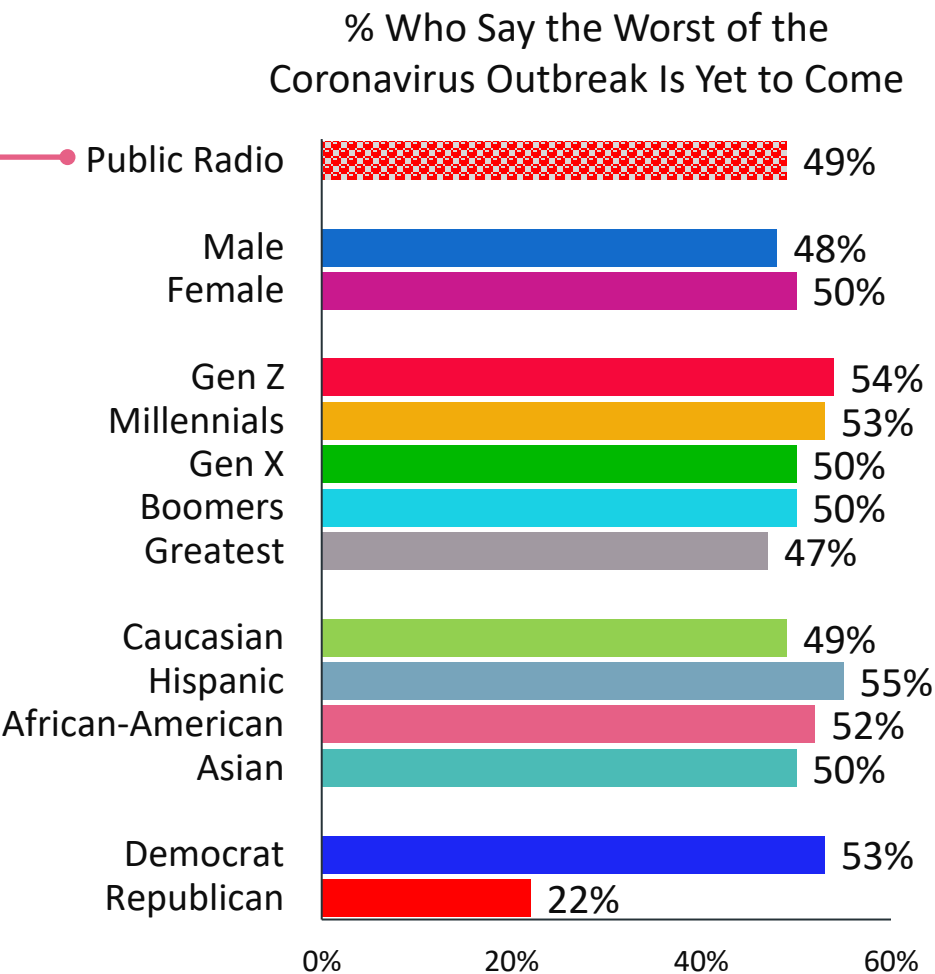
Public Radio Listeners Nearly Universally Say the Coronavirus Outbreak Is a Full-Blown Crisis



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



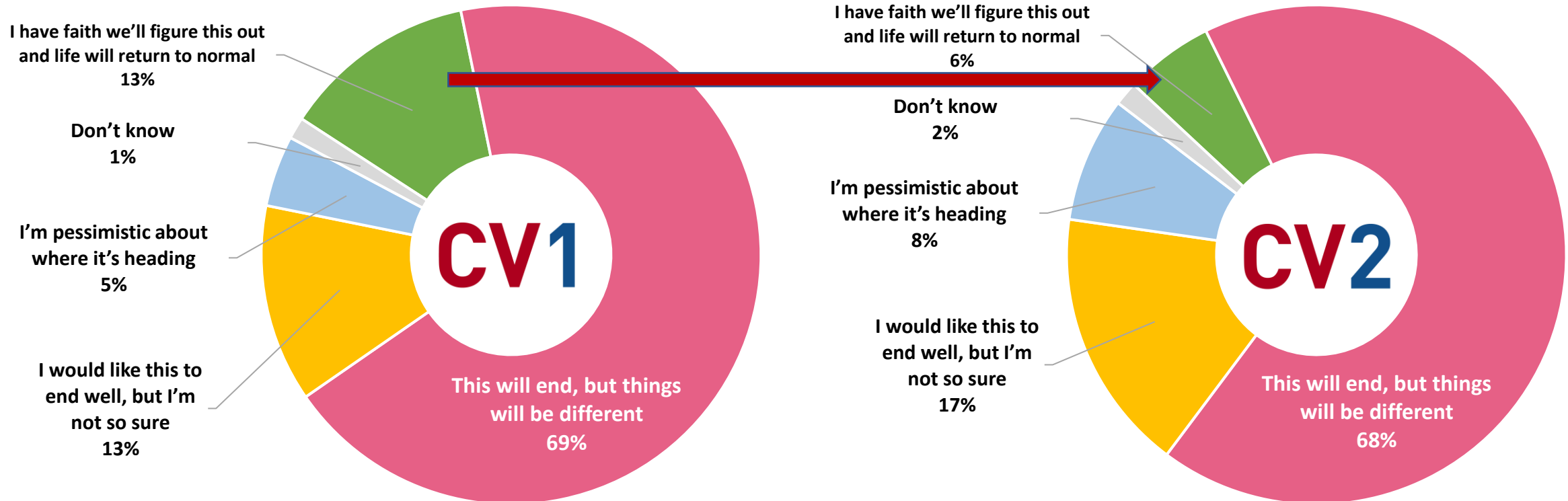
“Which of the following best describes how you feel about the coronavirus outbreak?”



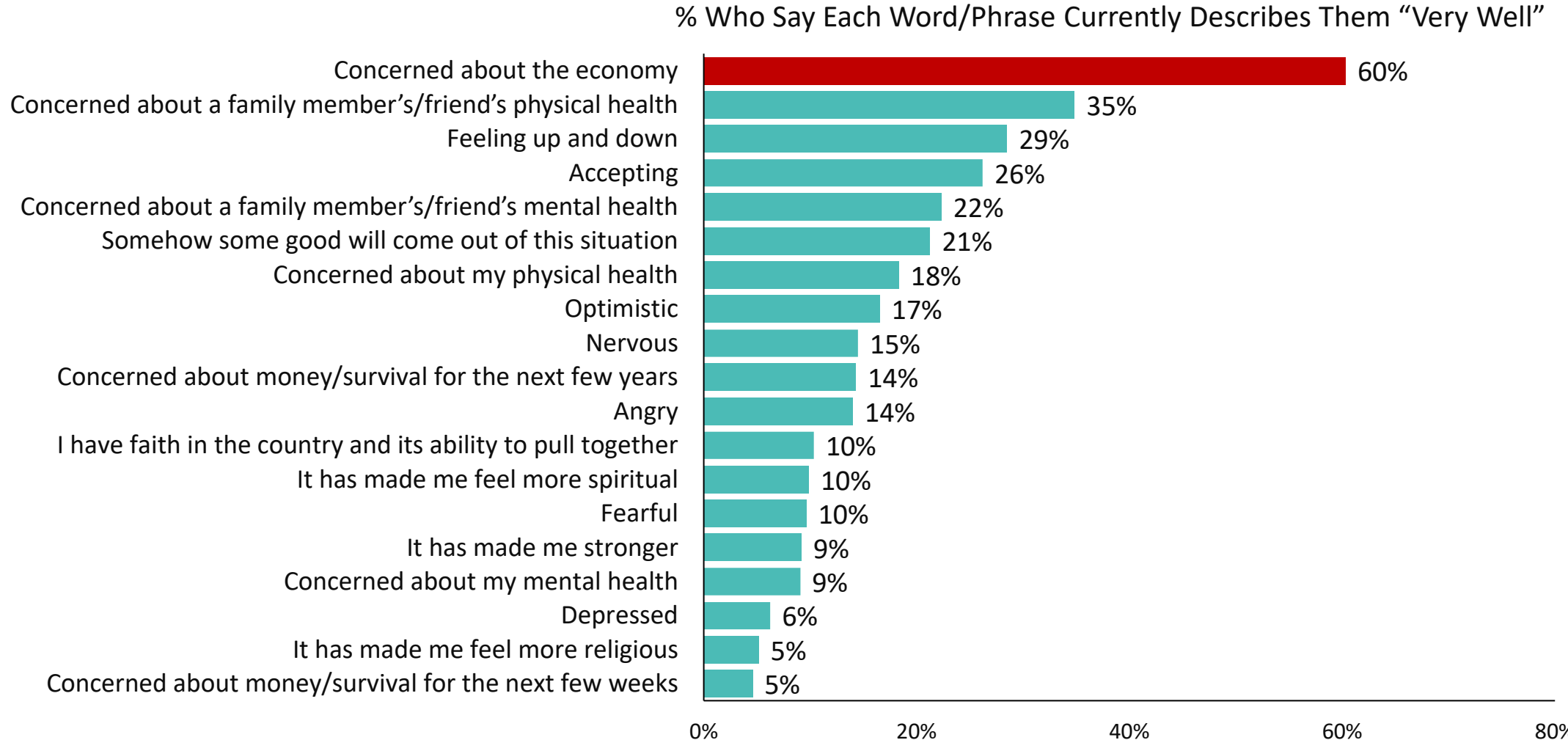
A Majority Still Say Things Will Be “Different” When the COVID-19 Crisis Ends, While Fewer See a Return to “Normal”

April 2020

May 2020

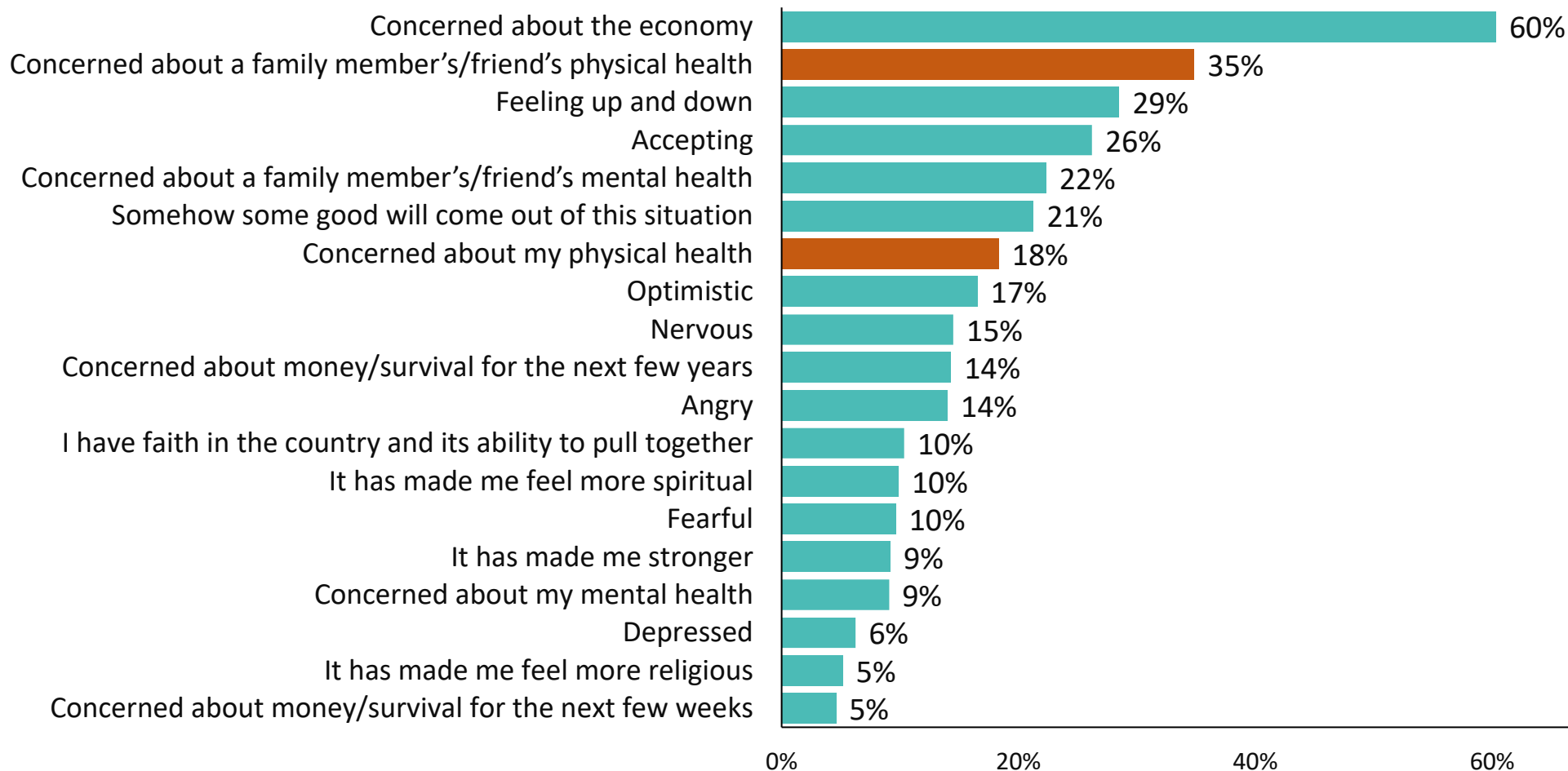


Similar to Last Month, the Economy Tops the List of Concerns



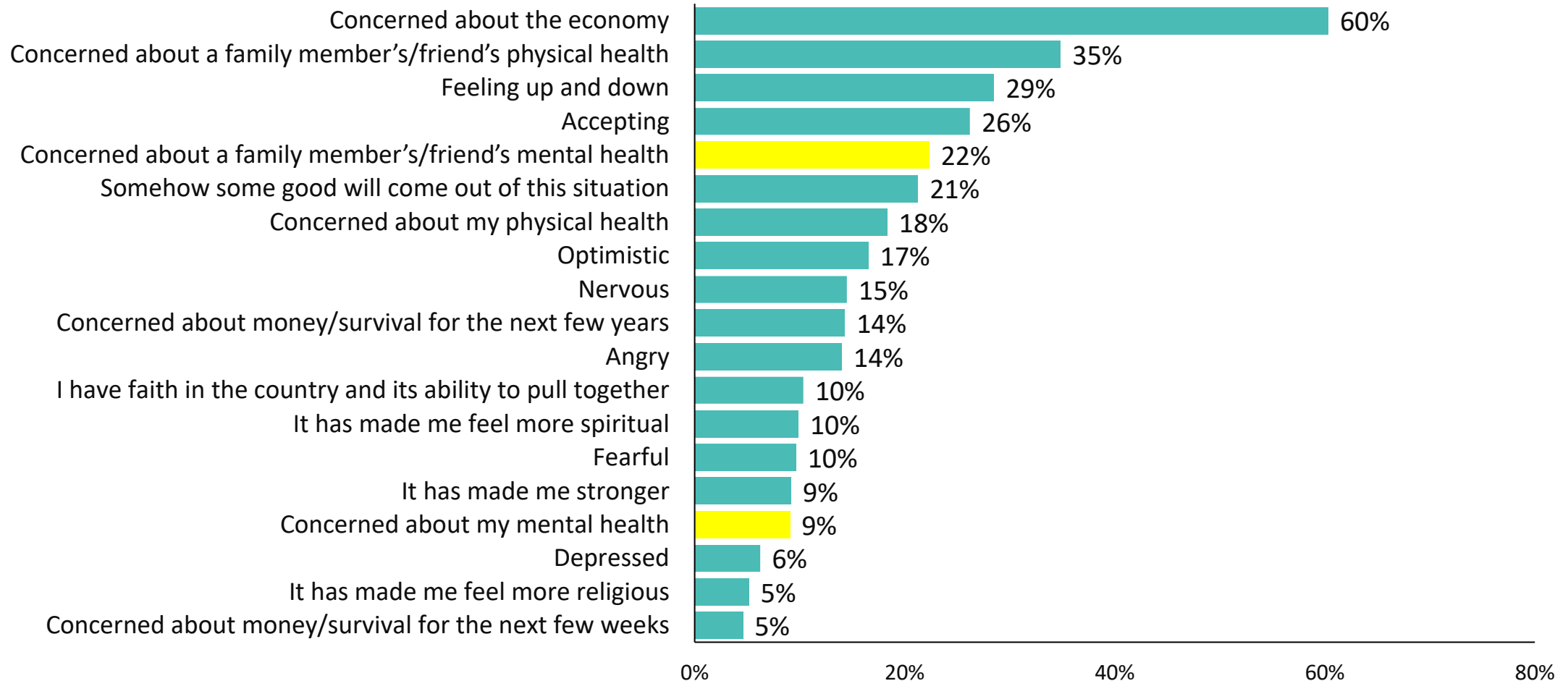
Nearly Twice as Many Respondents Are Concerned About Someone Else's Physical Health Over Their Own

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



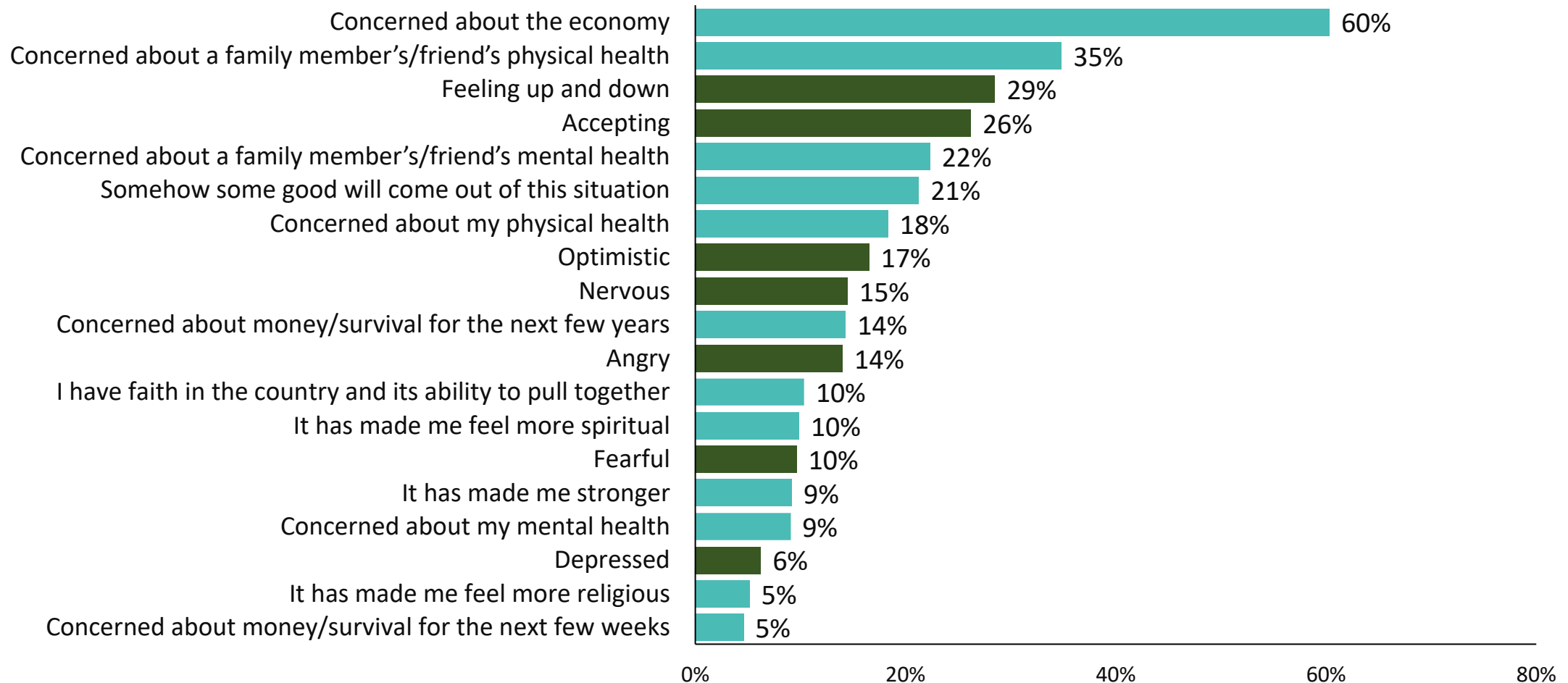
And More Than Twice as Many Are Concerned About Someone Else's Mental Health, Compared to Their Own

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



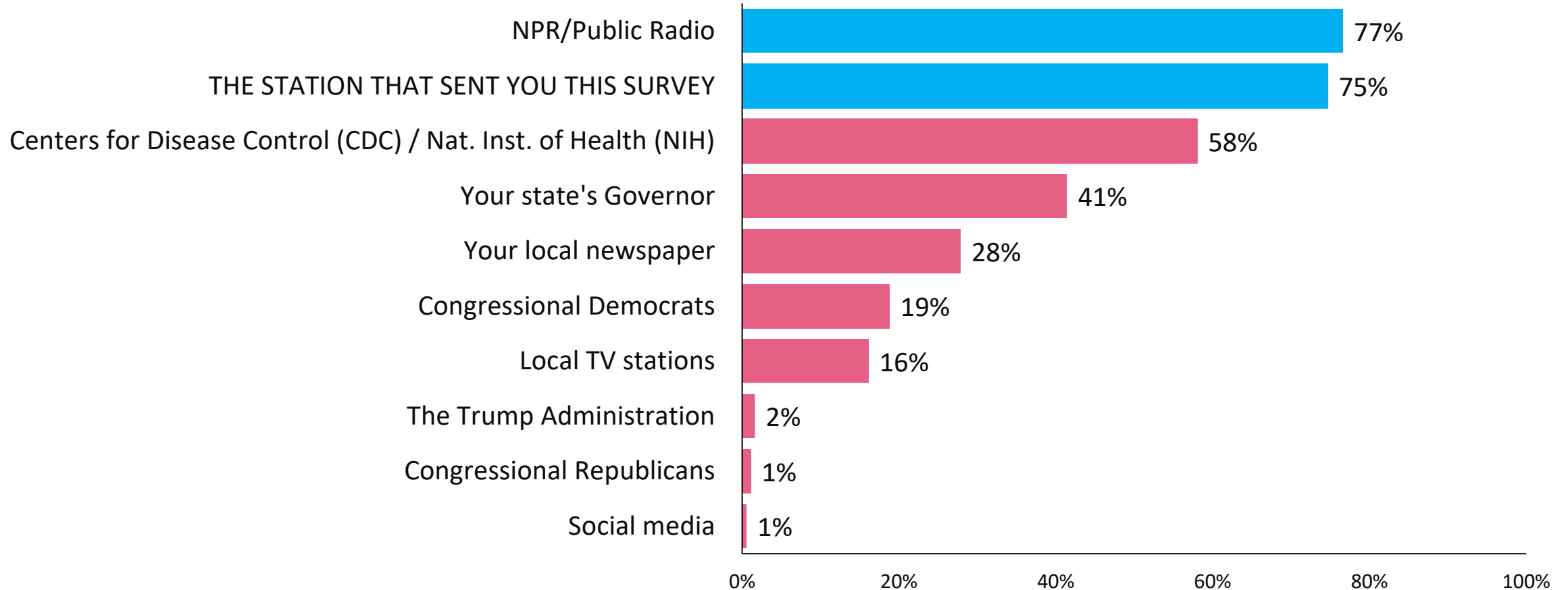
Respondents Are Less Apt to Feel Fearful or Depressed; More Likely To Feel “Up and Down” and “Accepting”

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

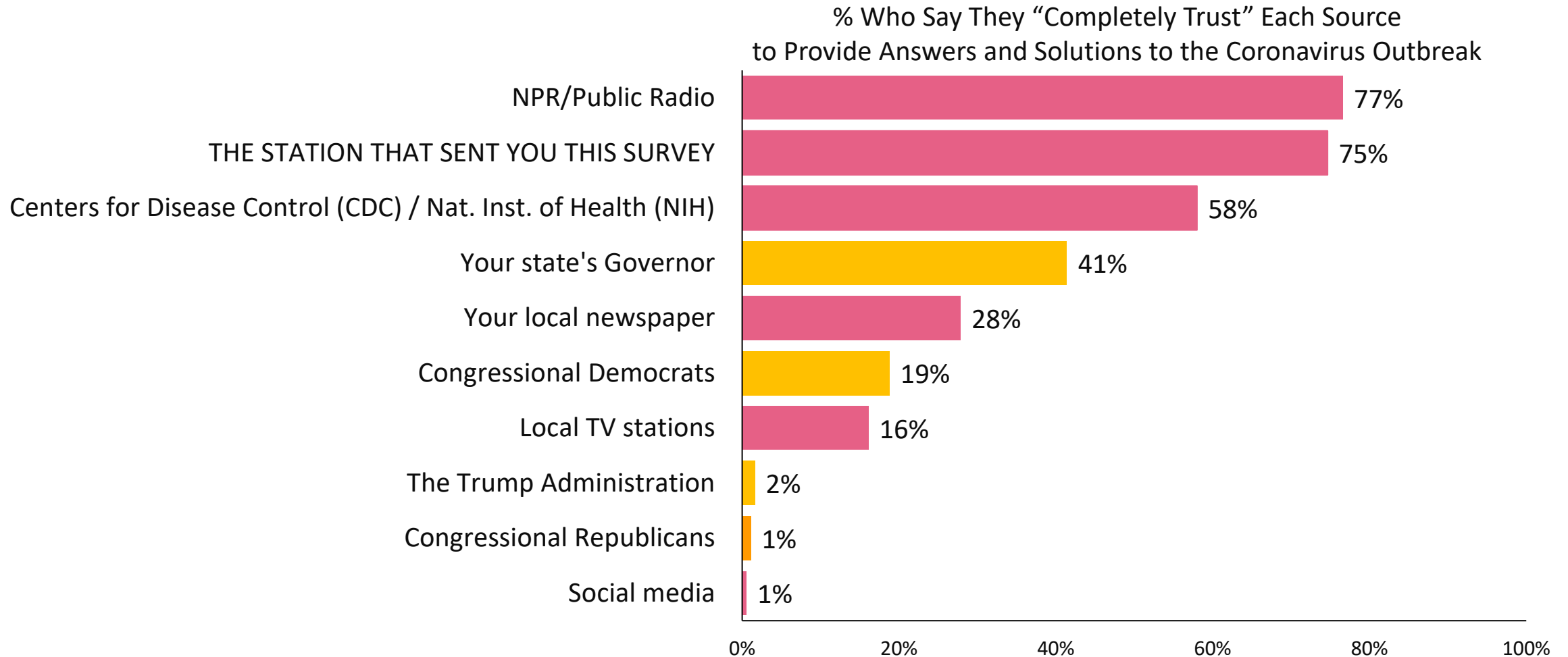


Similar to CV1, the Most Trust Goes to NPR, Listeners' Home Stations, Followed By the CDC/NIH

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

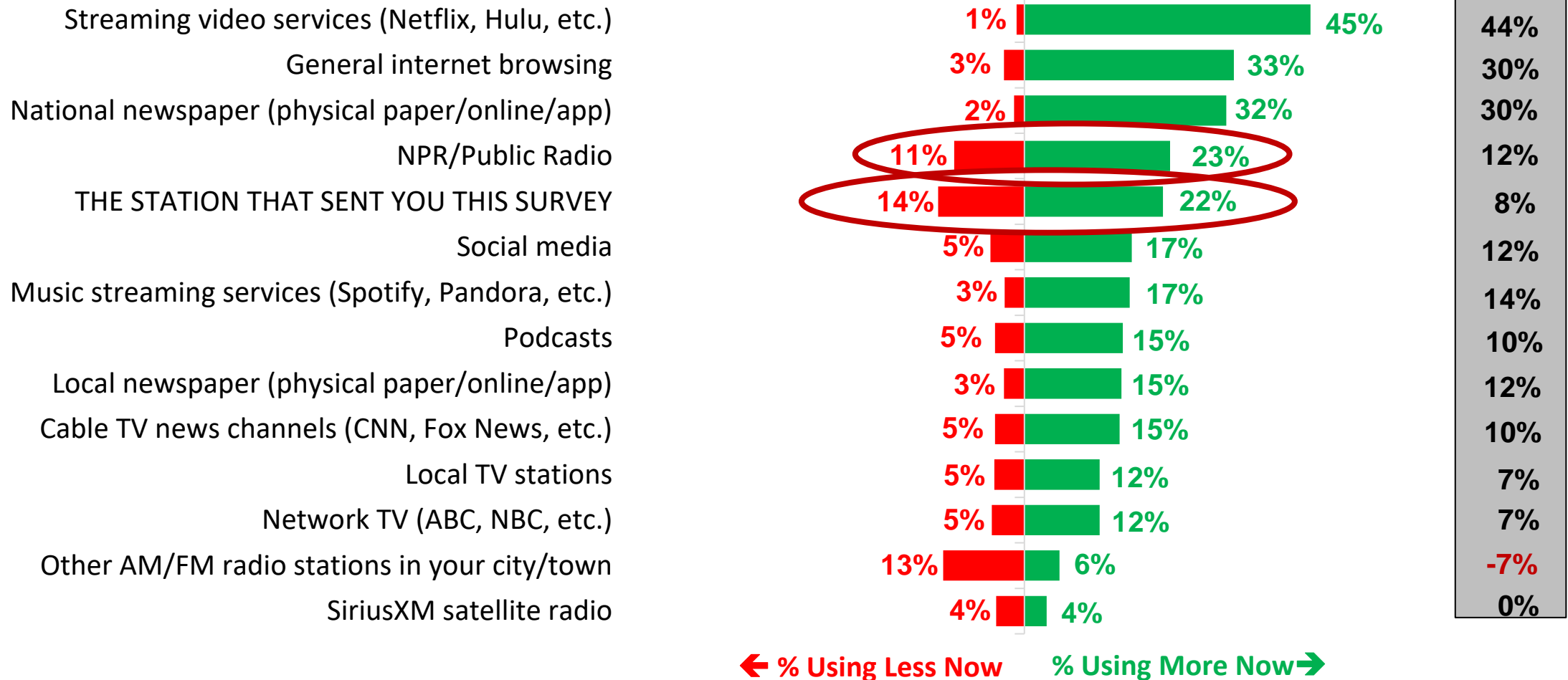


Among Political Officials, State Governors Are Most Trusted

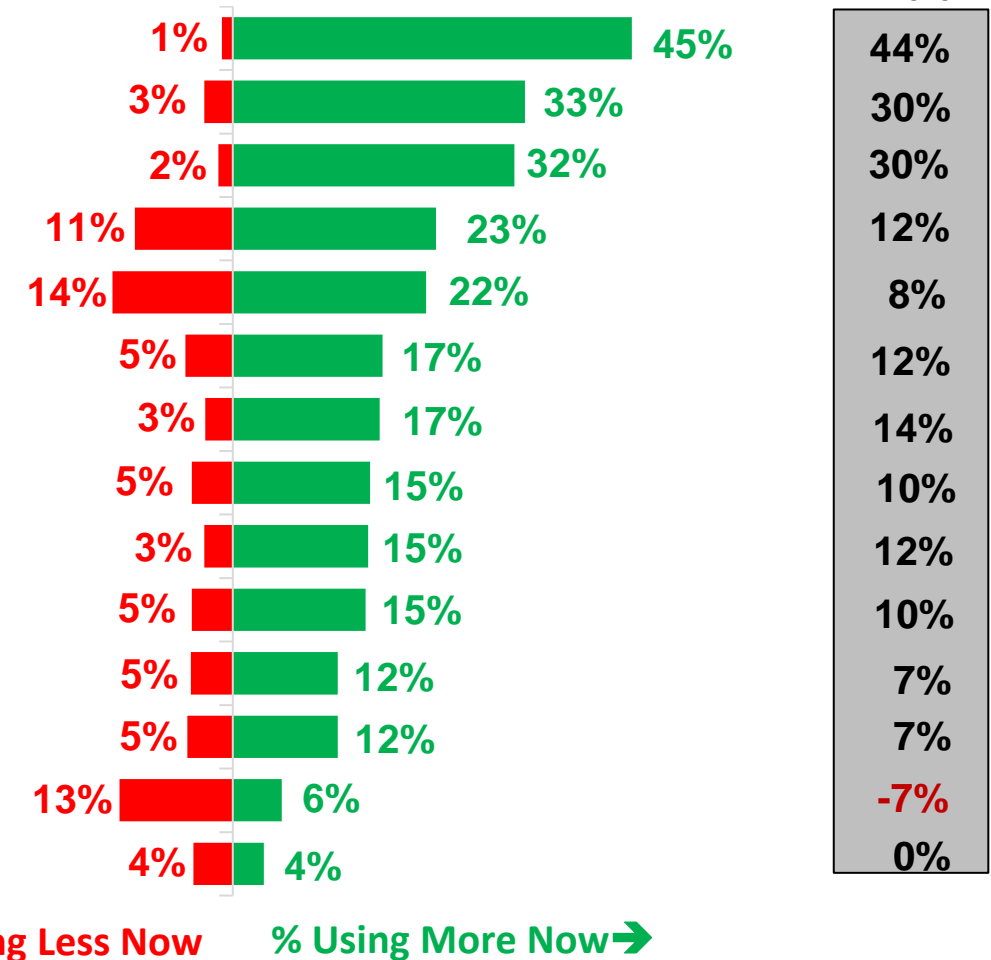
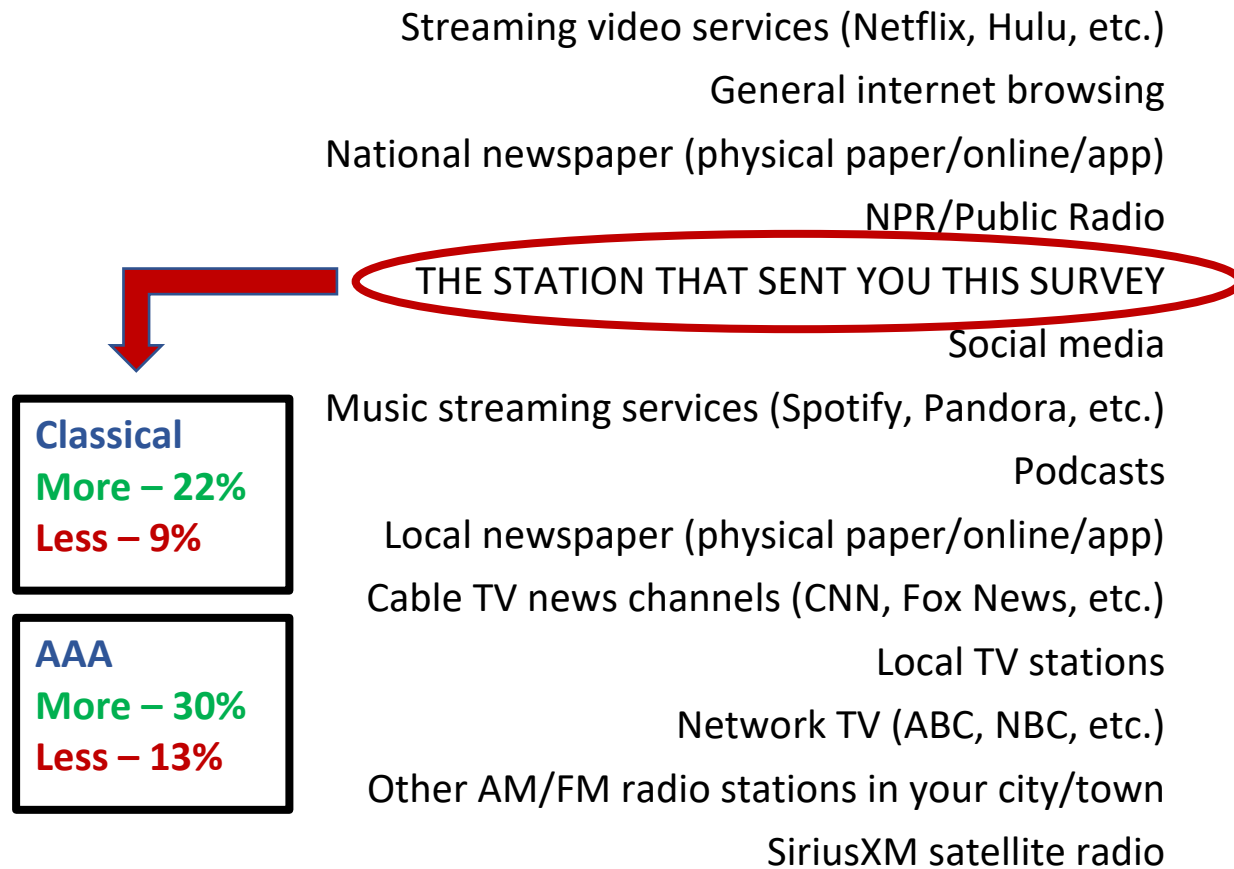




Since COVID-19, Home Station Listening Is Solid; Streaming Video, Web Browsing and Newspapers Are All Strong

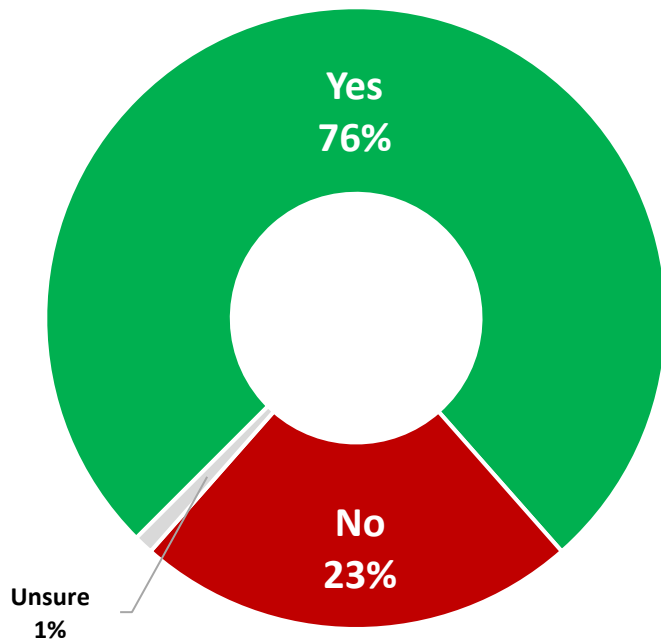


Of the Public Radio Formats, Classical and AAA Appear To Be Getting Impressive “Lift” From the COVID-19 Crisis

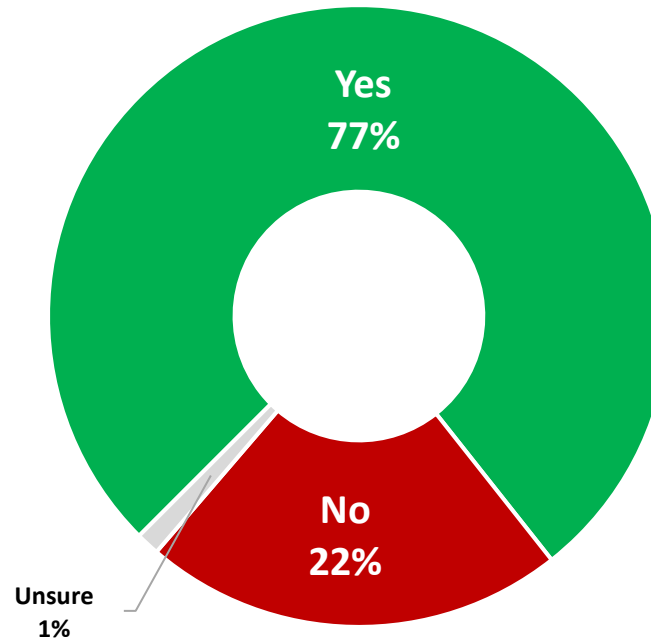


More Than One-Fifth Do NOT Have a Working Radio in Their Homes That They Use

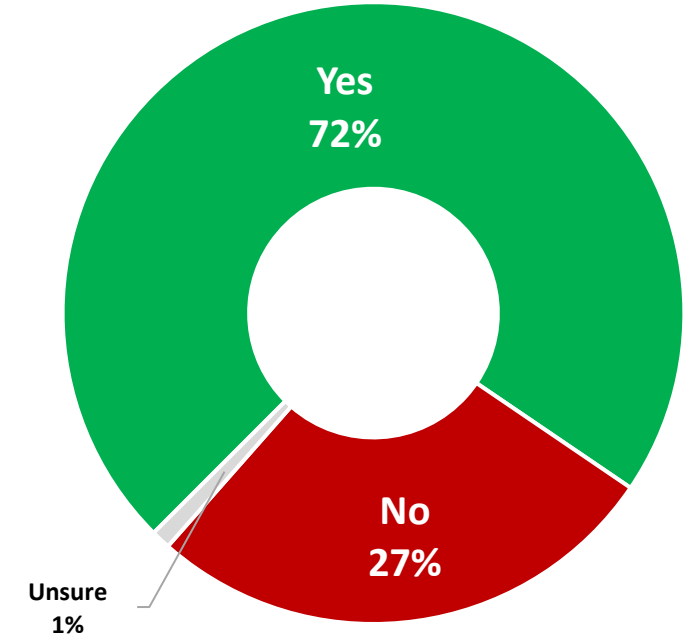
Public Radio



Commercial Radio



Christian Music Radio

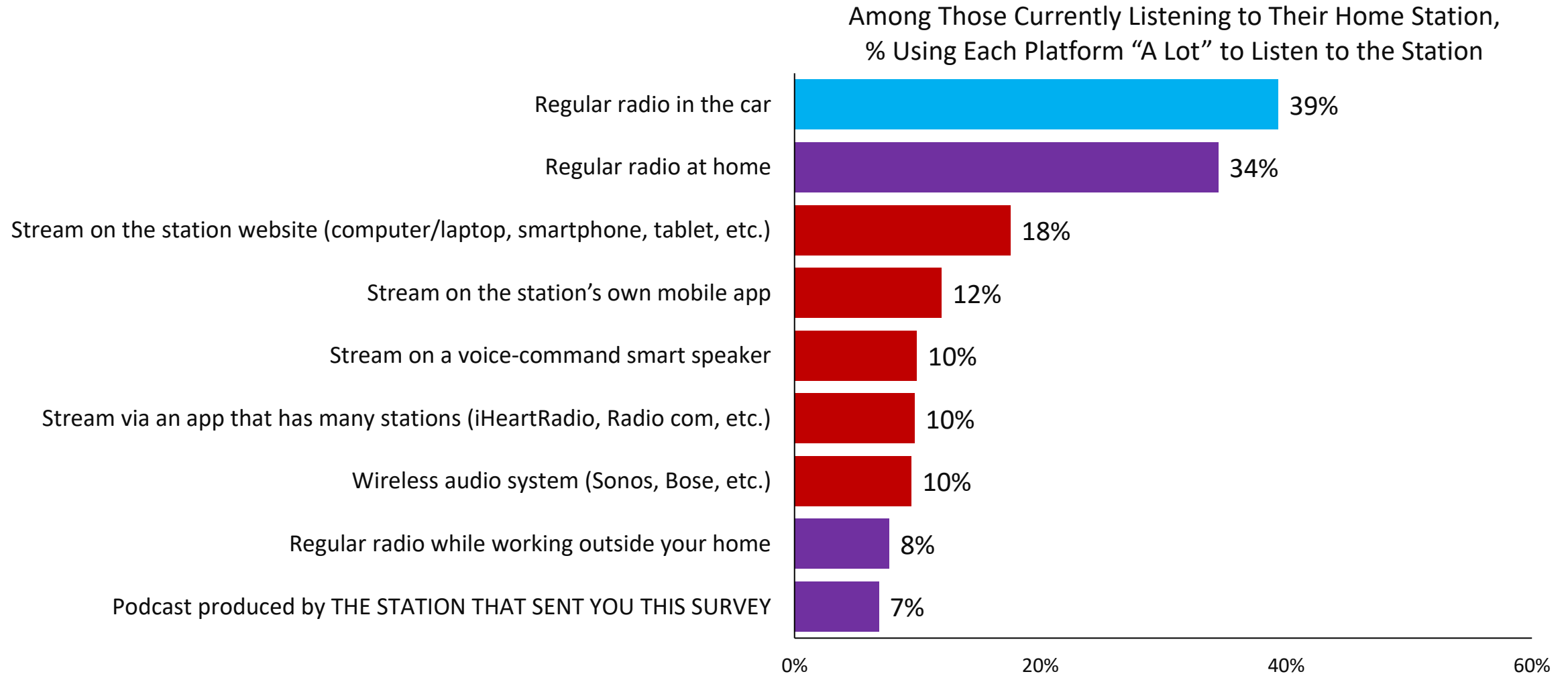


"In your home, do you have a working radio that you use?"



Public Radio Listening & the Coronavirus

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



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

Don't know/haven't listened

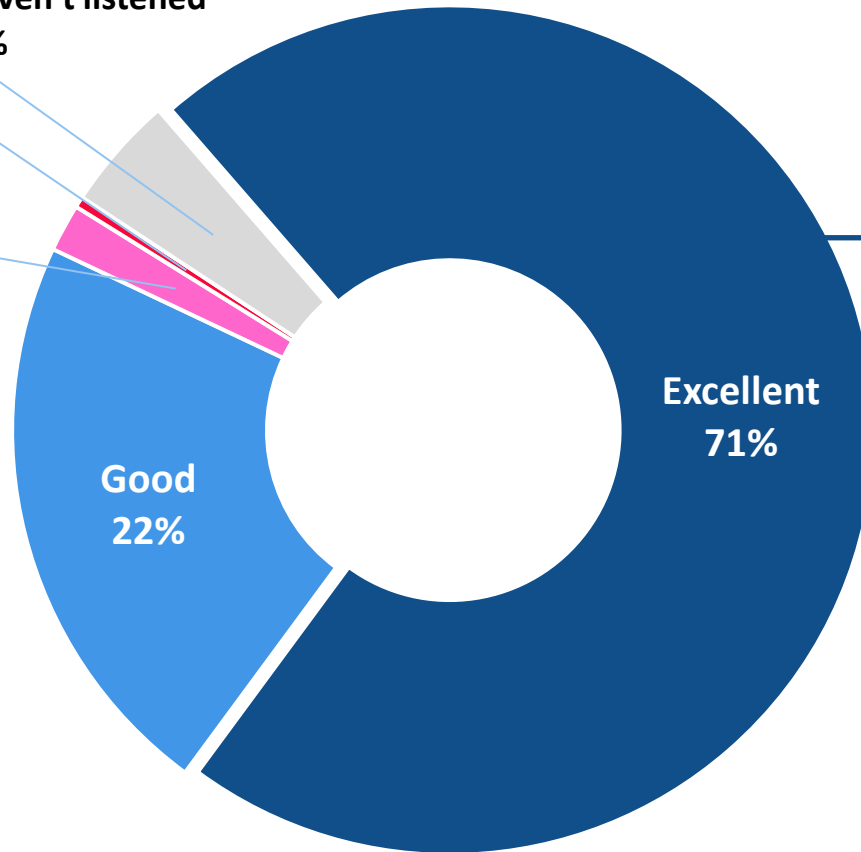
4%

Poor

0%

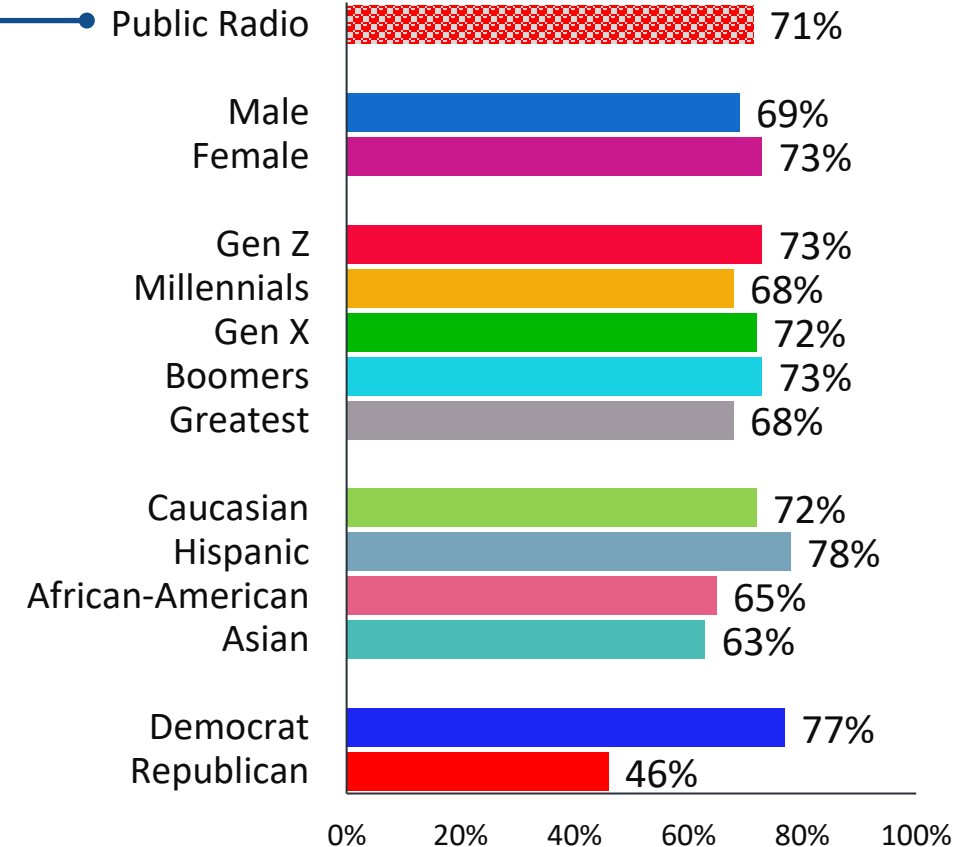
Fair

2%



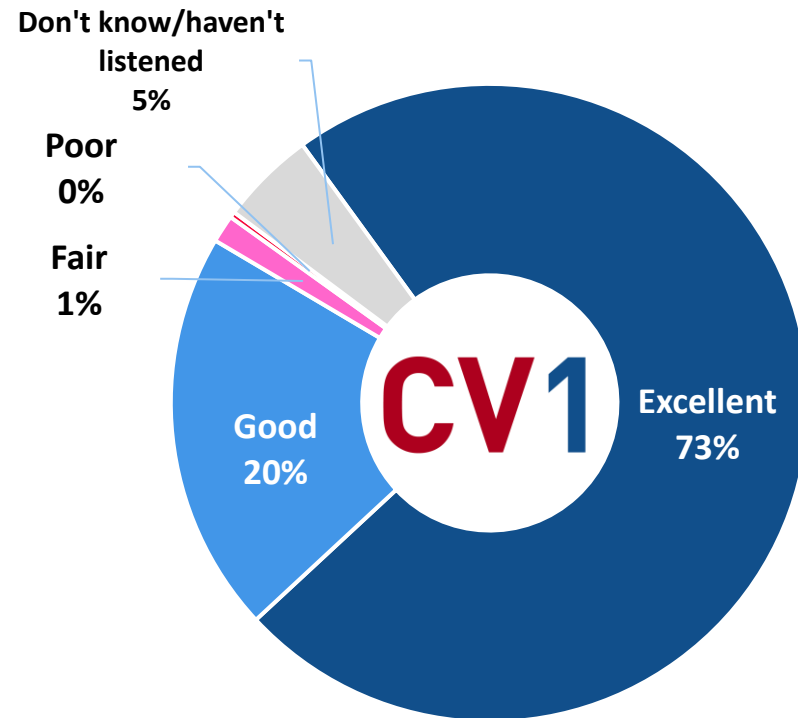
“Think about your listening to THE STATION THAT SENT YOU THIS SURVEY. How would you rate the station SINCE the start of the coronavirus outbreak?”

% Who Rate Their Home Station as “Excellent”

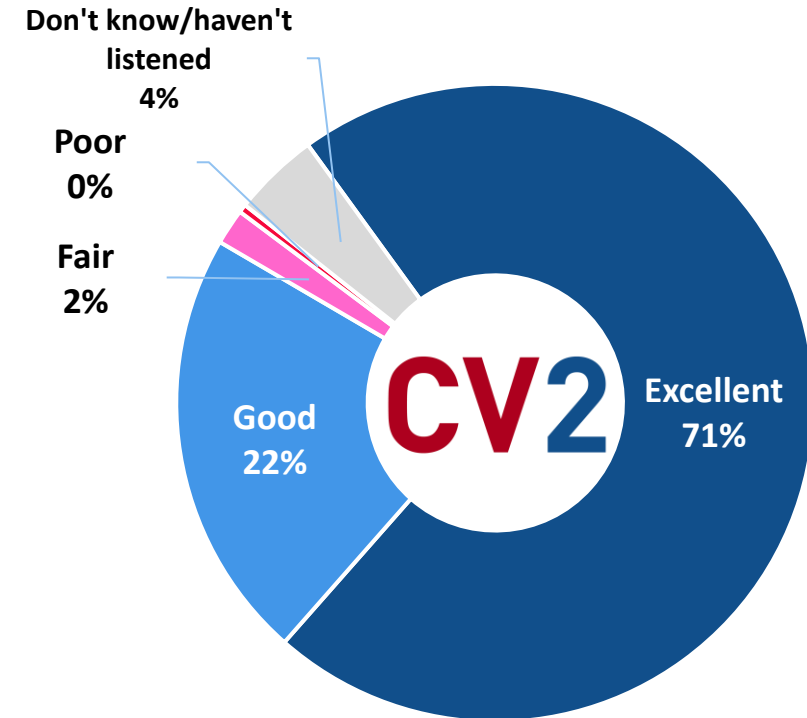


Seven in Ten Rate Their Home Station “Excellent” Since the Coronavirus Outbreak

April 2020

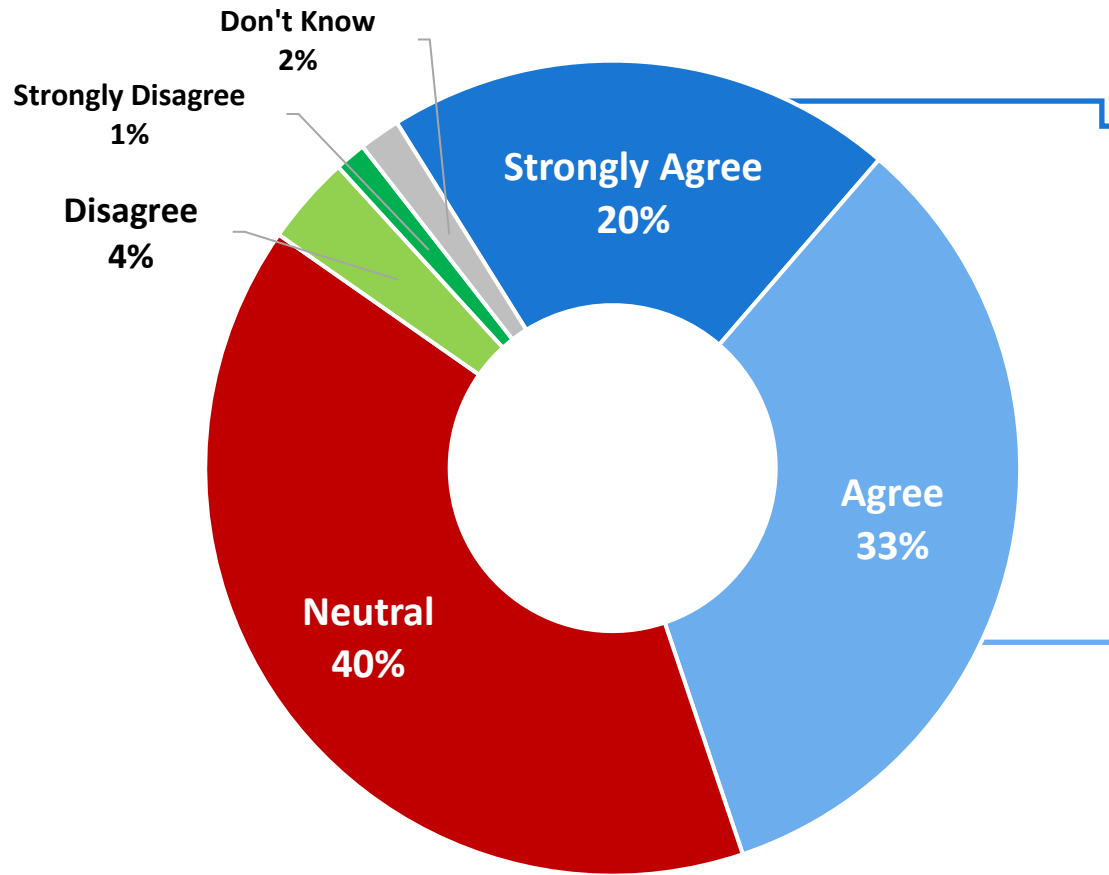


May 2020

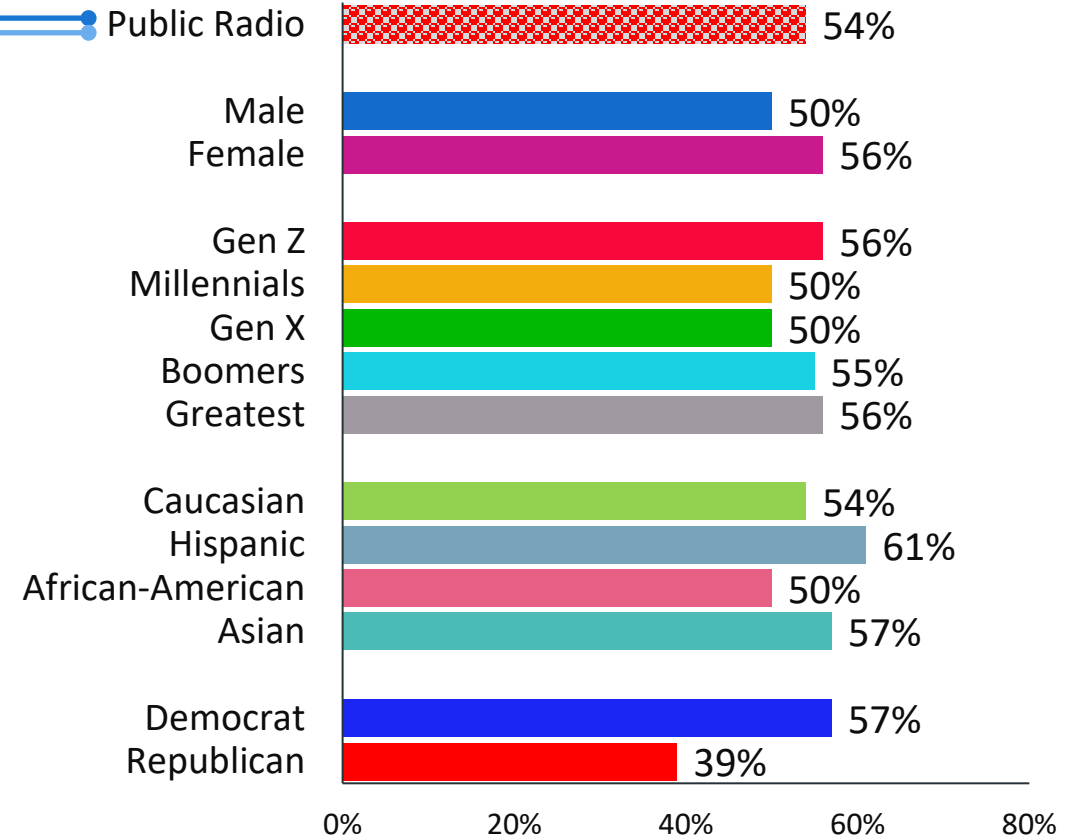


*“Think about your listening to THE STATION THAT SENT YOU THIS SURVEY.
How would you rate the station SINCE the start of the coronavirus outbreak?”*

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



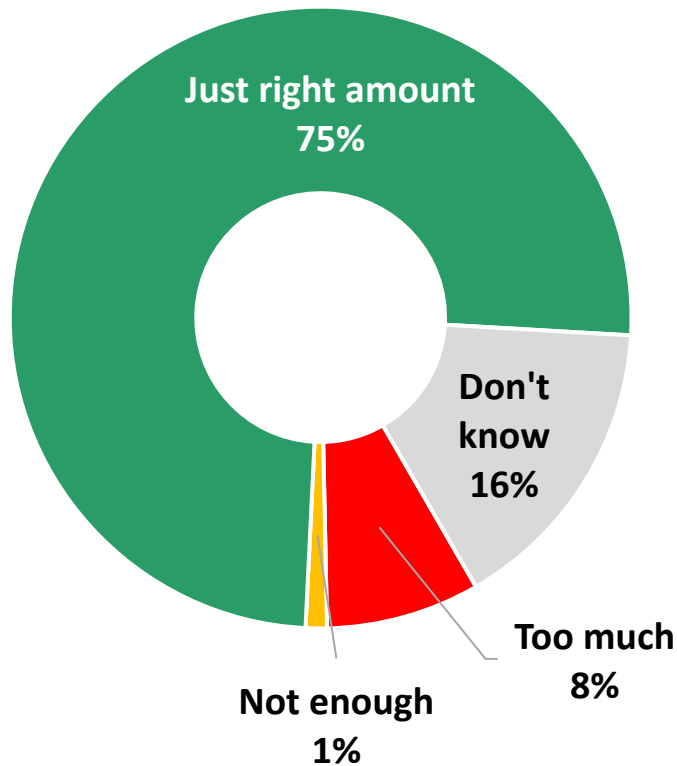
% Agreement (Strongly Agree + Agree)



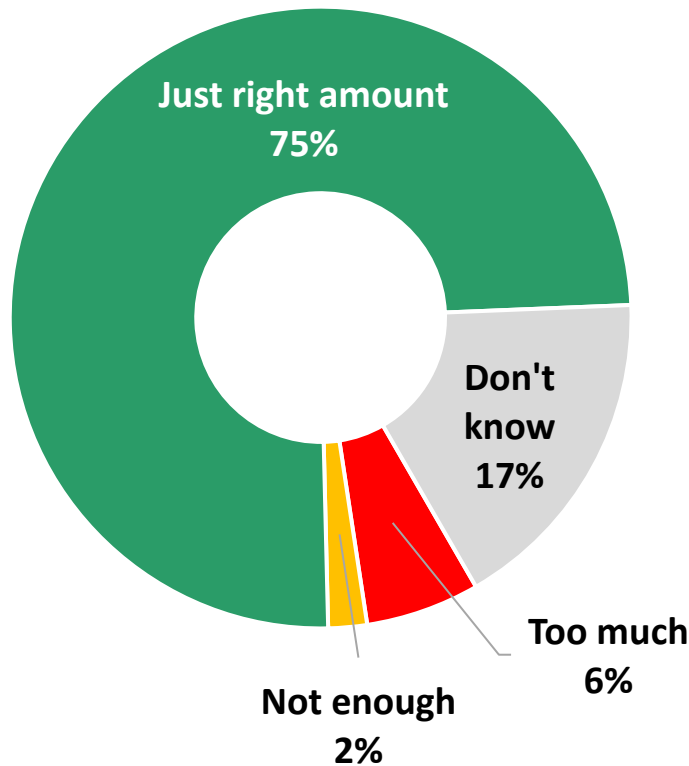
"Since the start of the coronavirus outbreak, I feel a stronger sense of connection with THE STATION THAT SENT ME THIS SURVEY"

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

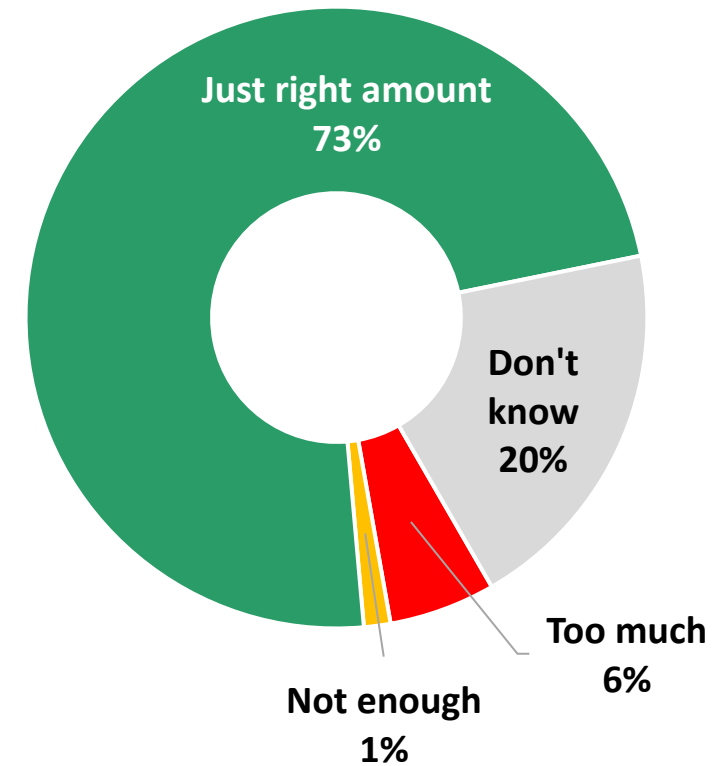
Public Radio



Commercial Radio



Christian Music Radio



Humor Is the Top Priority For Public Radio Listeners, Followed By Programming Distractions From COVID-19 and Supporting Local Workers



Programs that provide a distraction from the coronavirus situation

Support local workers (first responders, grocery store workers, etc.)

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

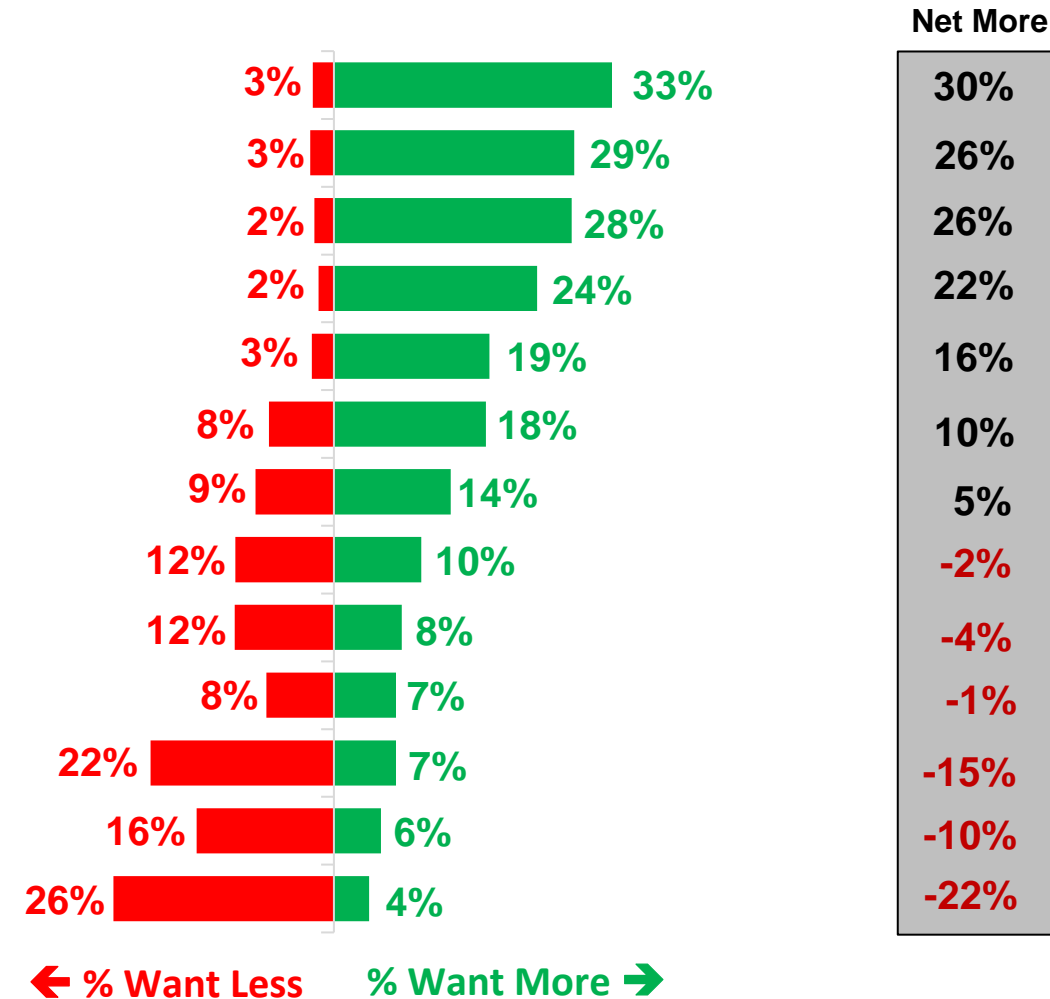
Programming for the family (geared toward parents, kids, etc.)

News updates about coronavirus

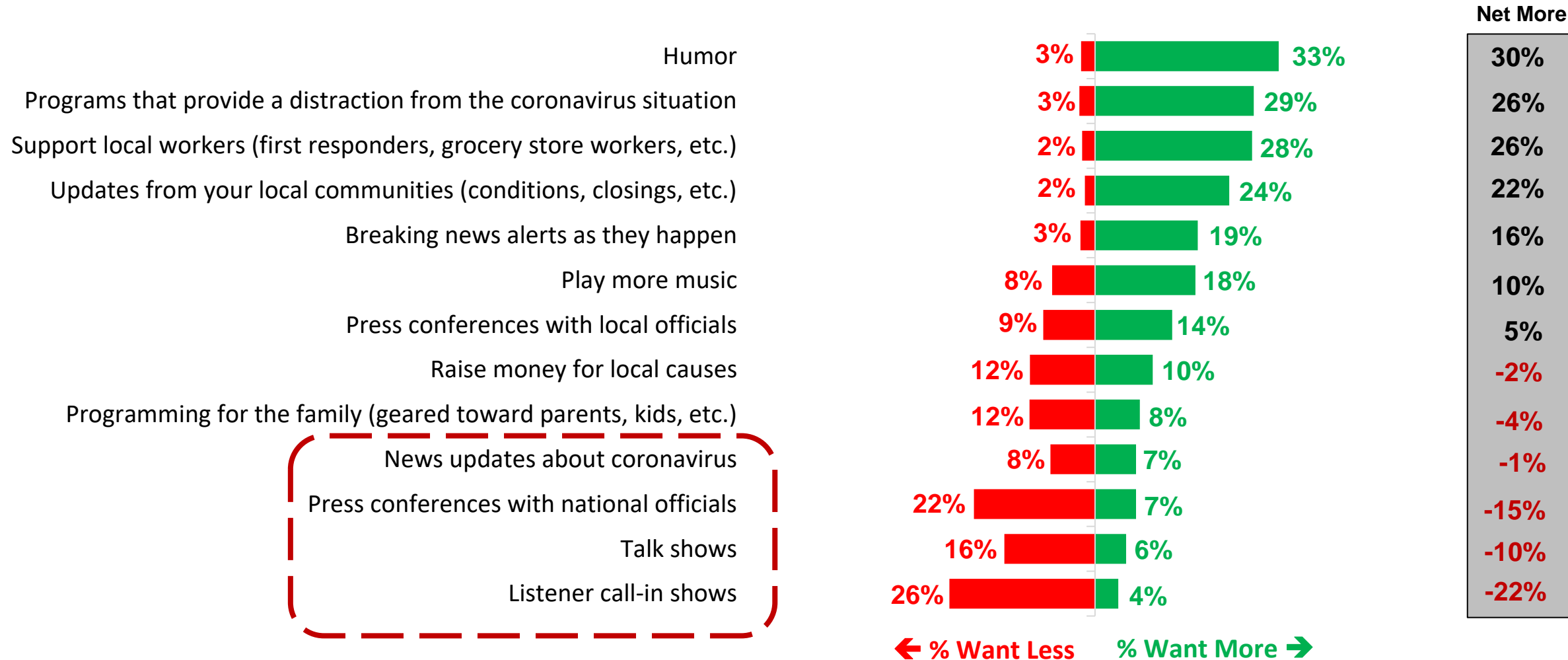
Press conferences with national officials

Talk shows

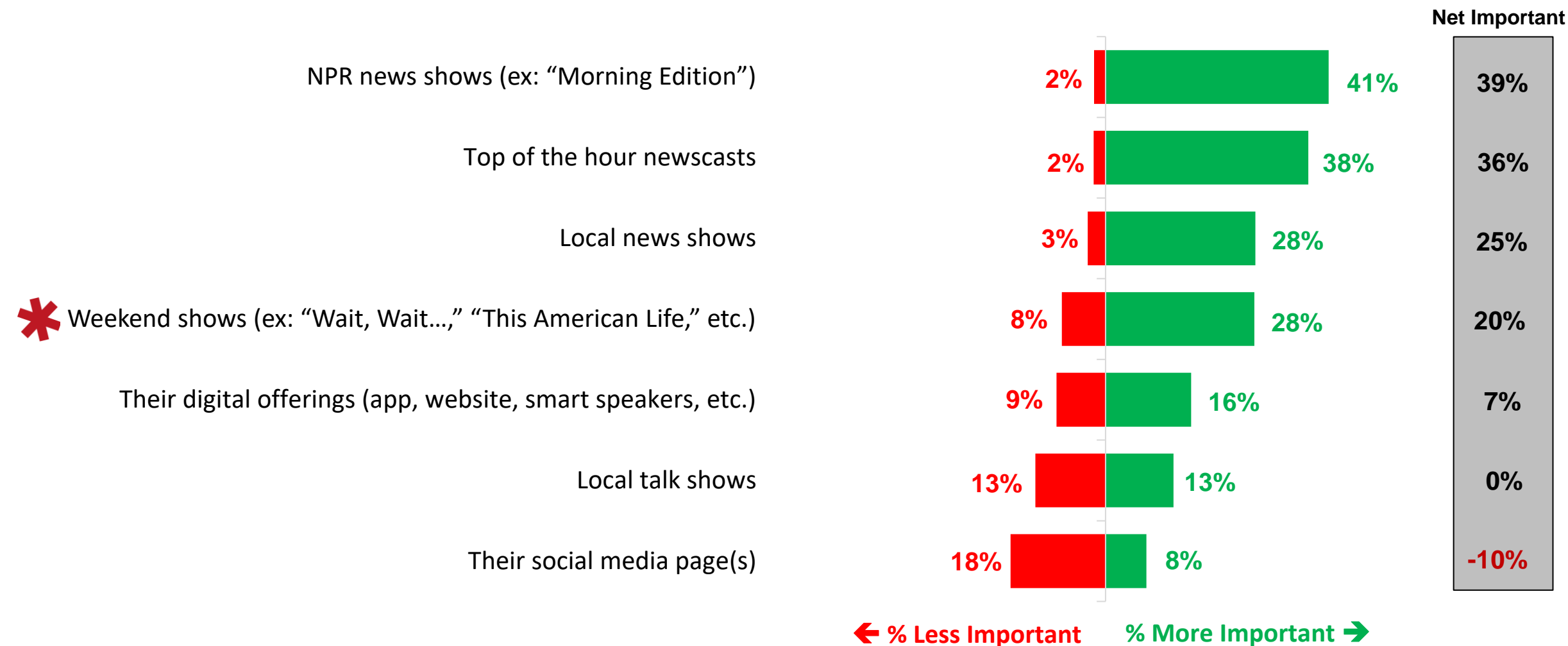
Listener call-in shows



And Deeper News Dives, Talk Shows, and Listener Call-Ins Are Least Desirable



NPR News, TOH Newscasts, And Local Shows Are Most Important Now, Followed By Closely By “Lighter” Weekend Programs

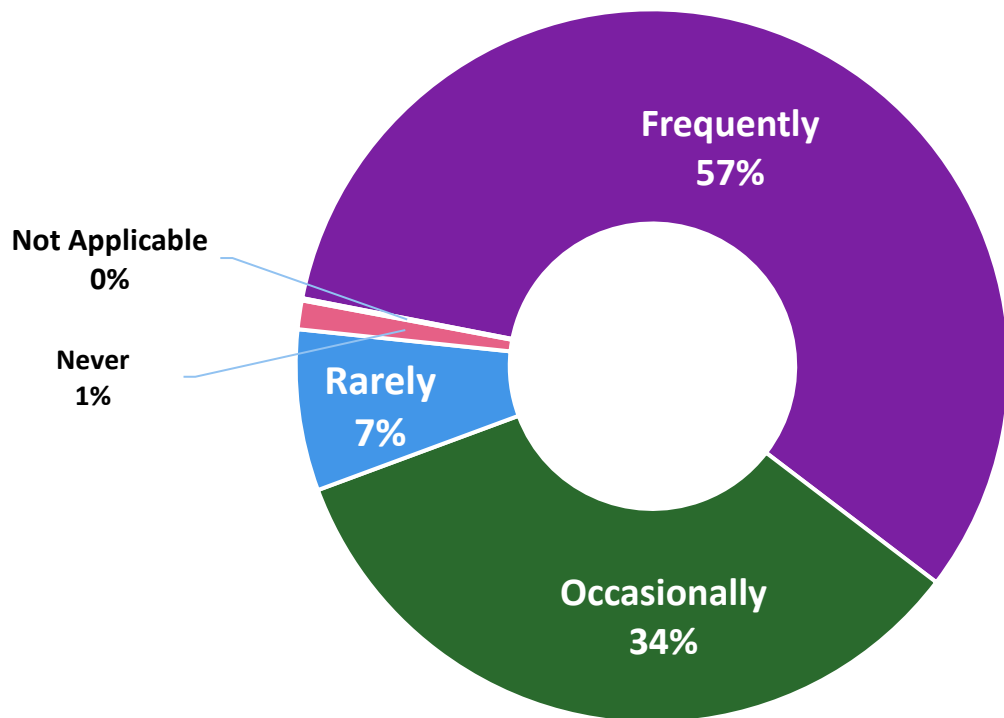




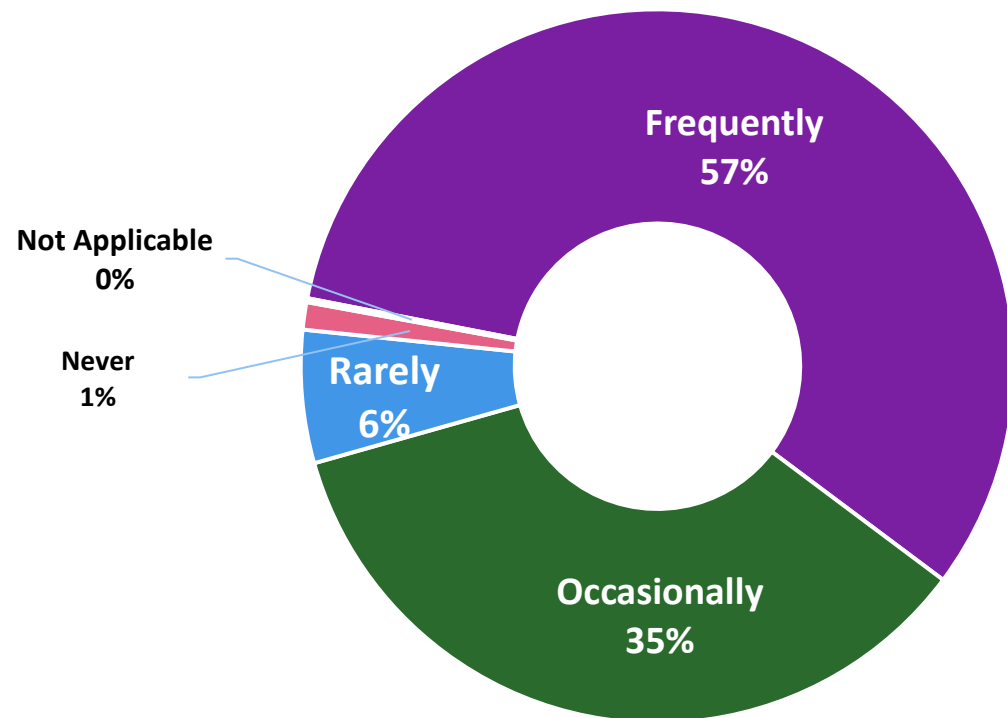
COVID-19 News Coverage

More Than Half Seek Both National and Local COVID-19 News Equally

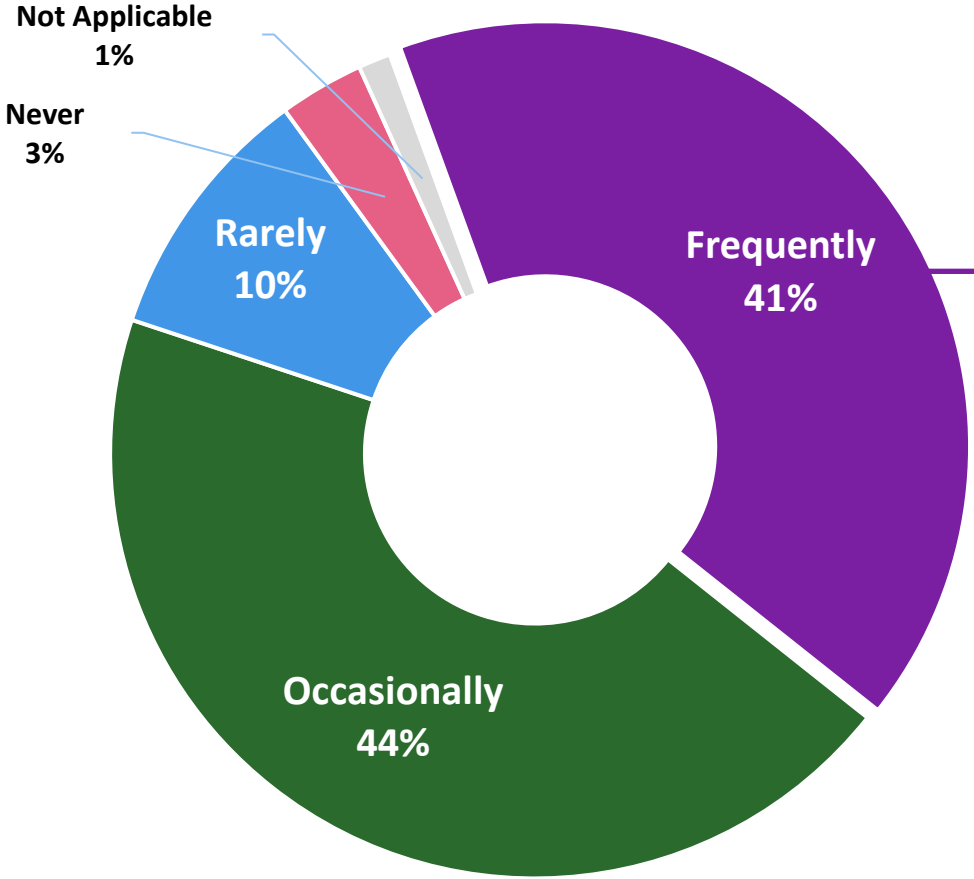
Those Seeking National COVID-19 News Coverage



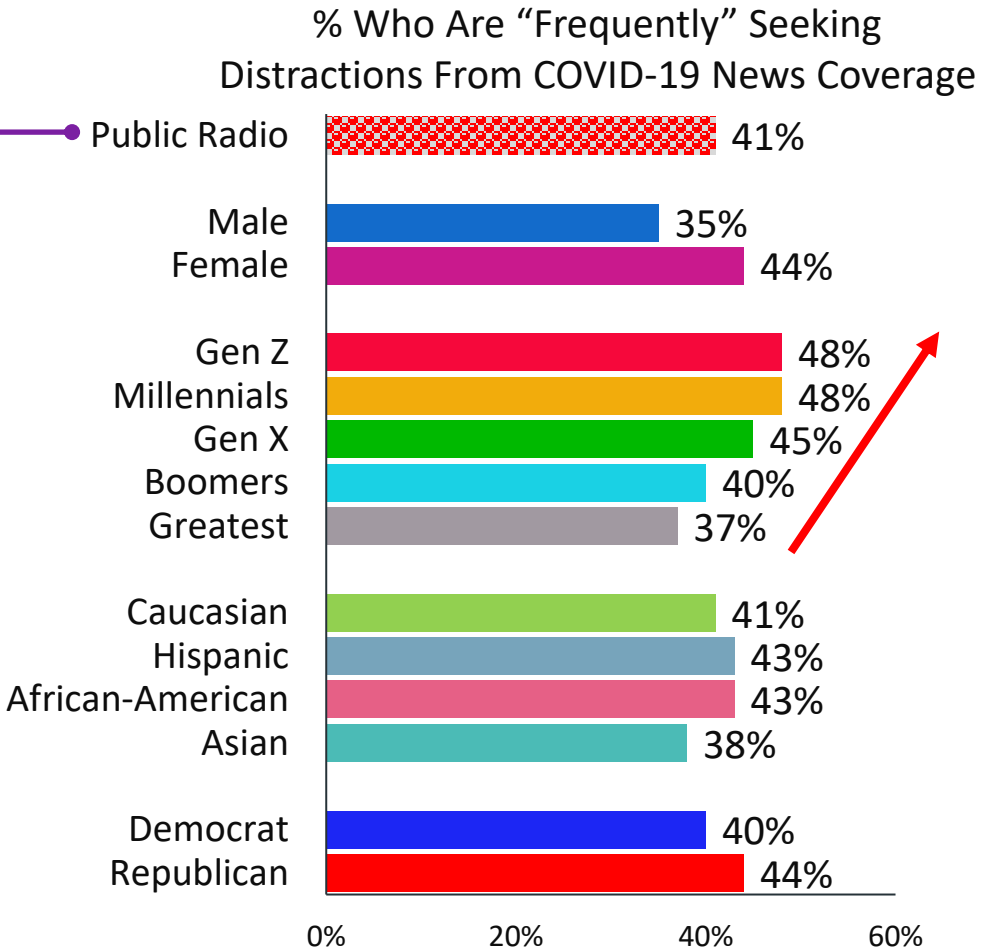
Those Seeking Local COVID-19 News Coverage



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

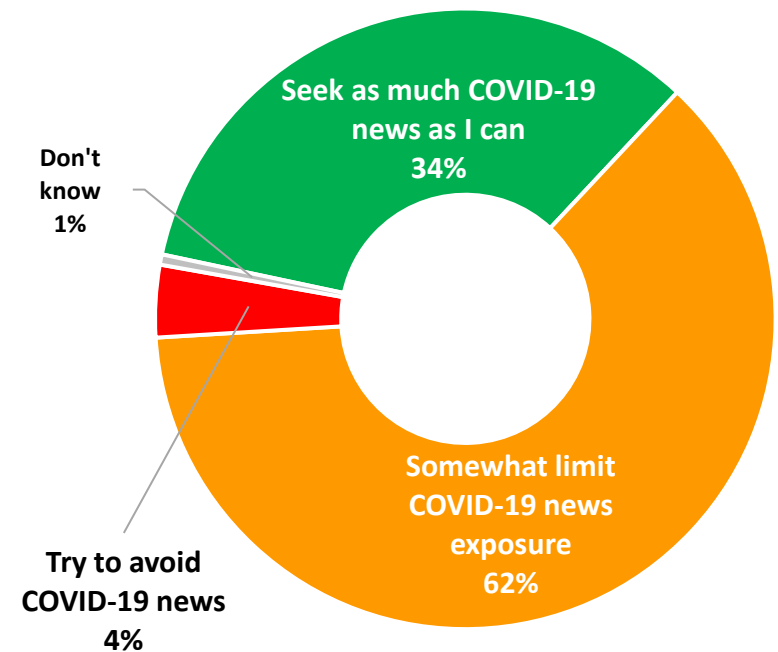


"At this time, how often are you personally seeking distractions from COVID-19 news coverage?"

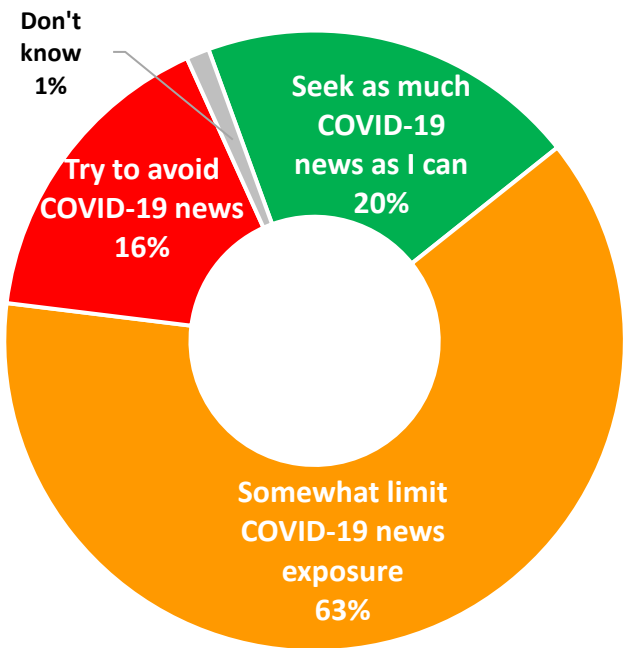


Most Try to at Least Somewhat Limit Their COVID-19 News Exposure

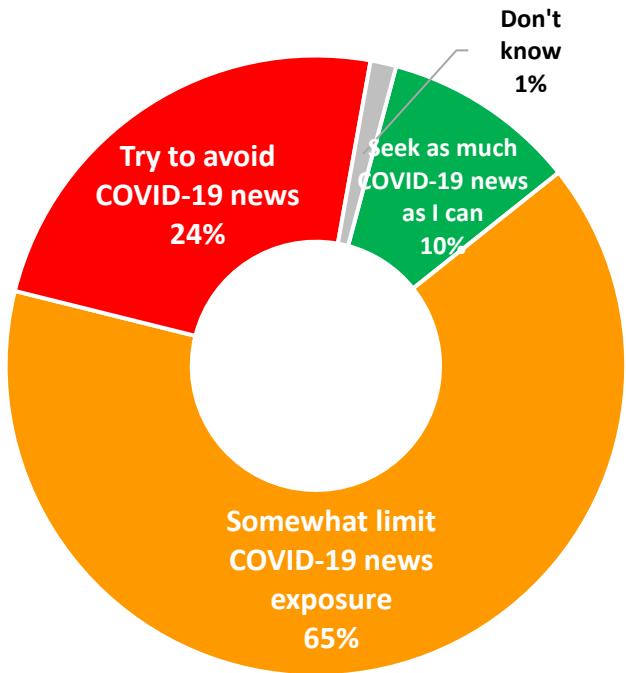
Public Radio



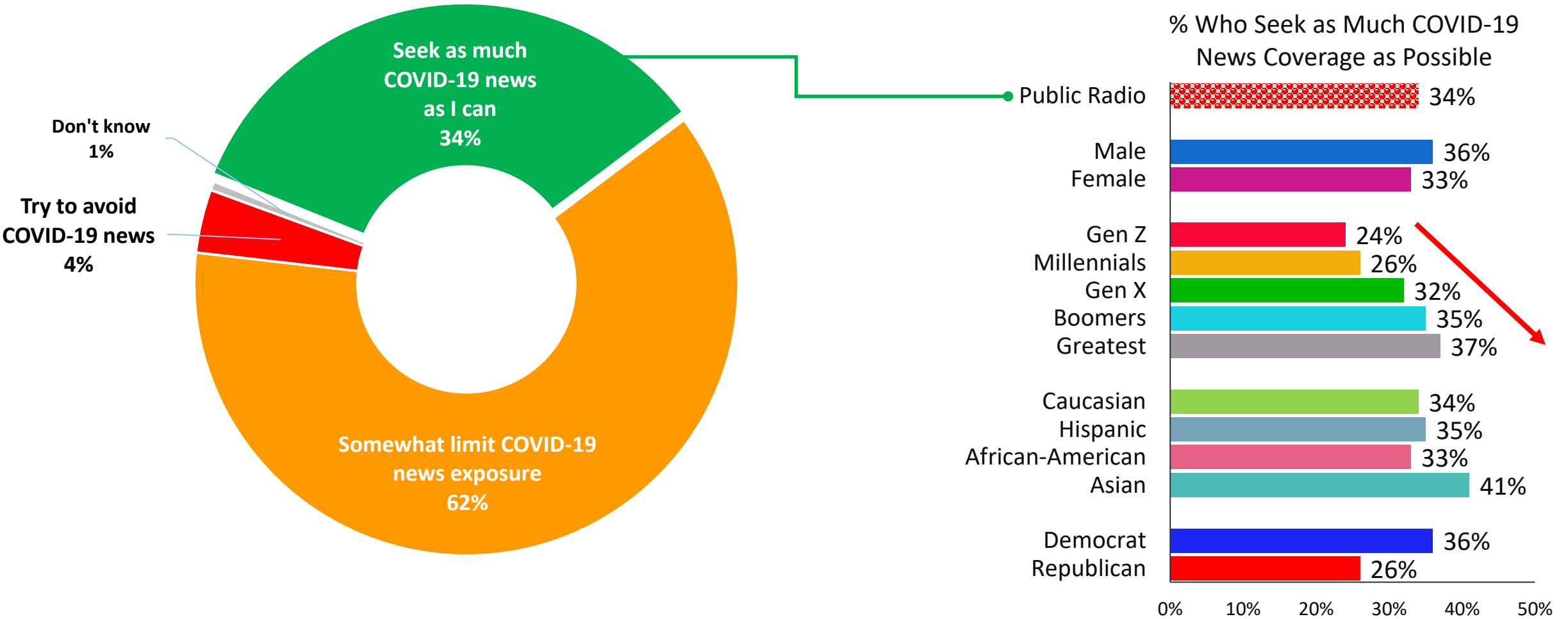
Commercial Radio



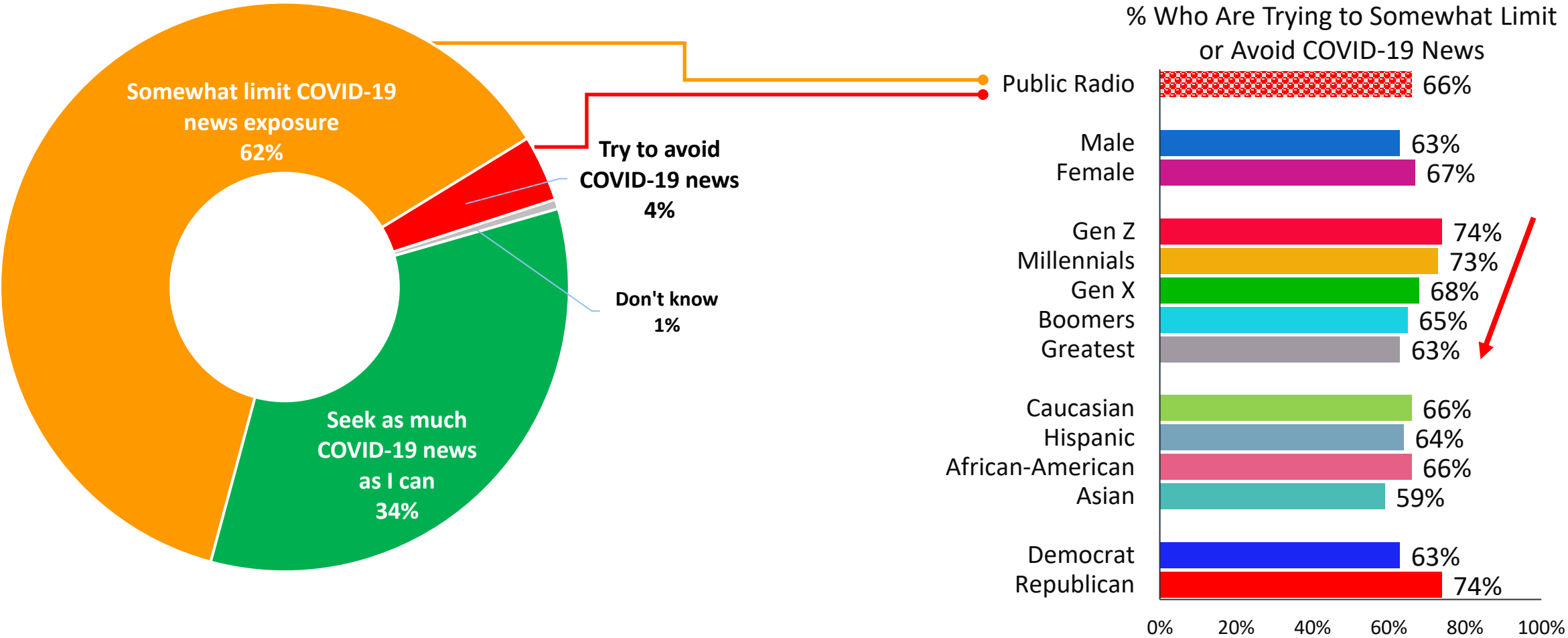
Christian Music Radio



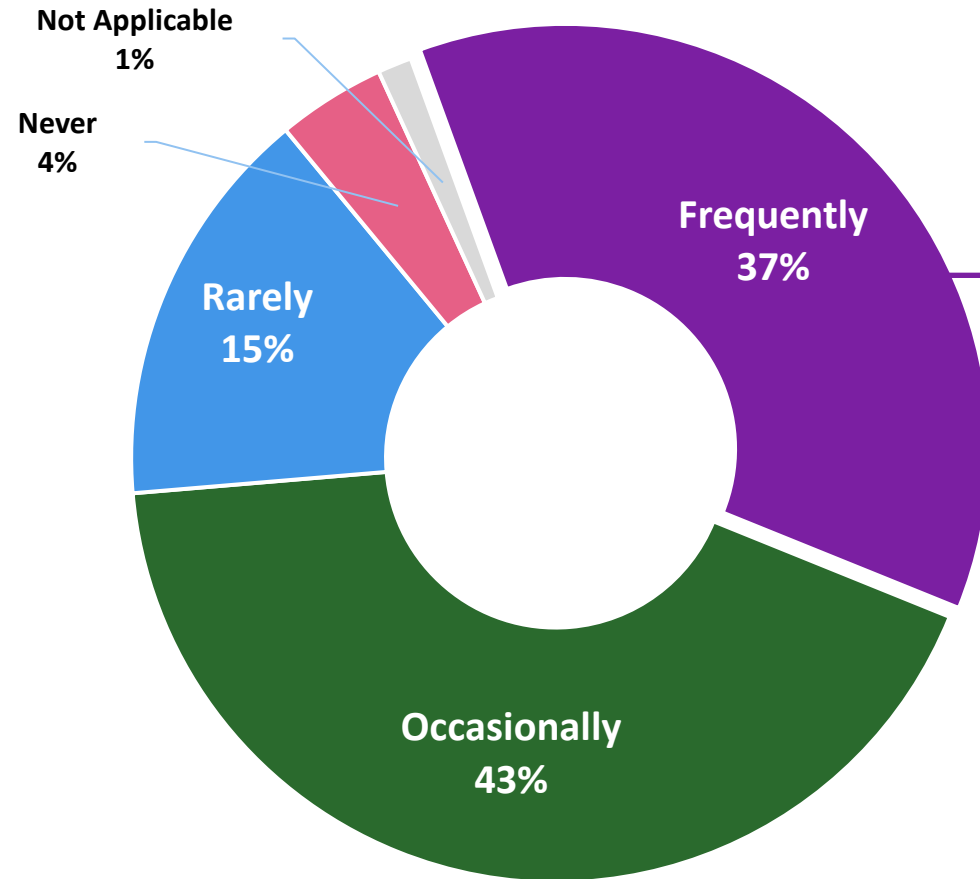
One in Three Seeks as Much COVID-19 News as Possible



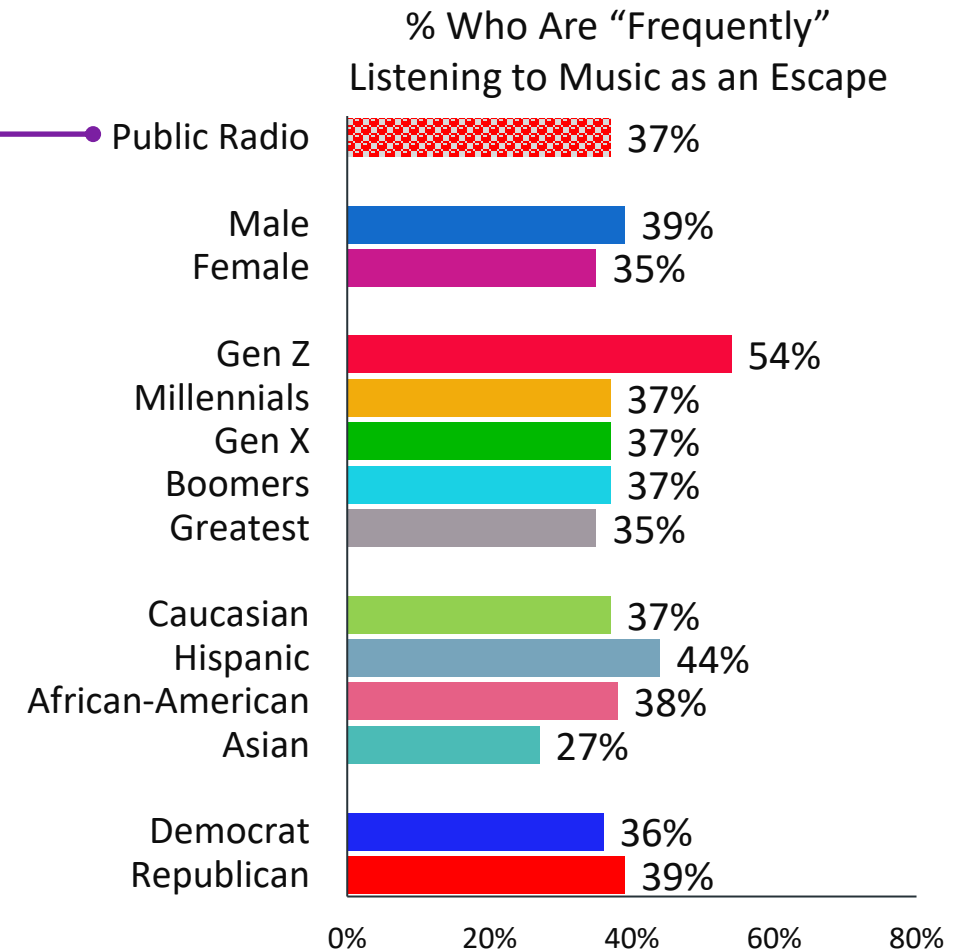
Two in Three Are Trying to Limit or Avoid COVID-19 News



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



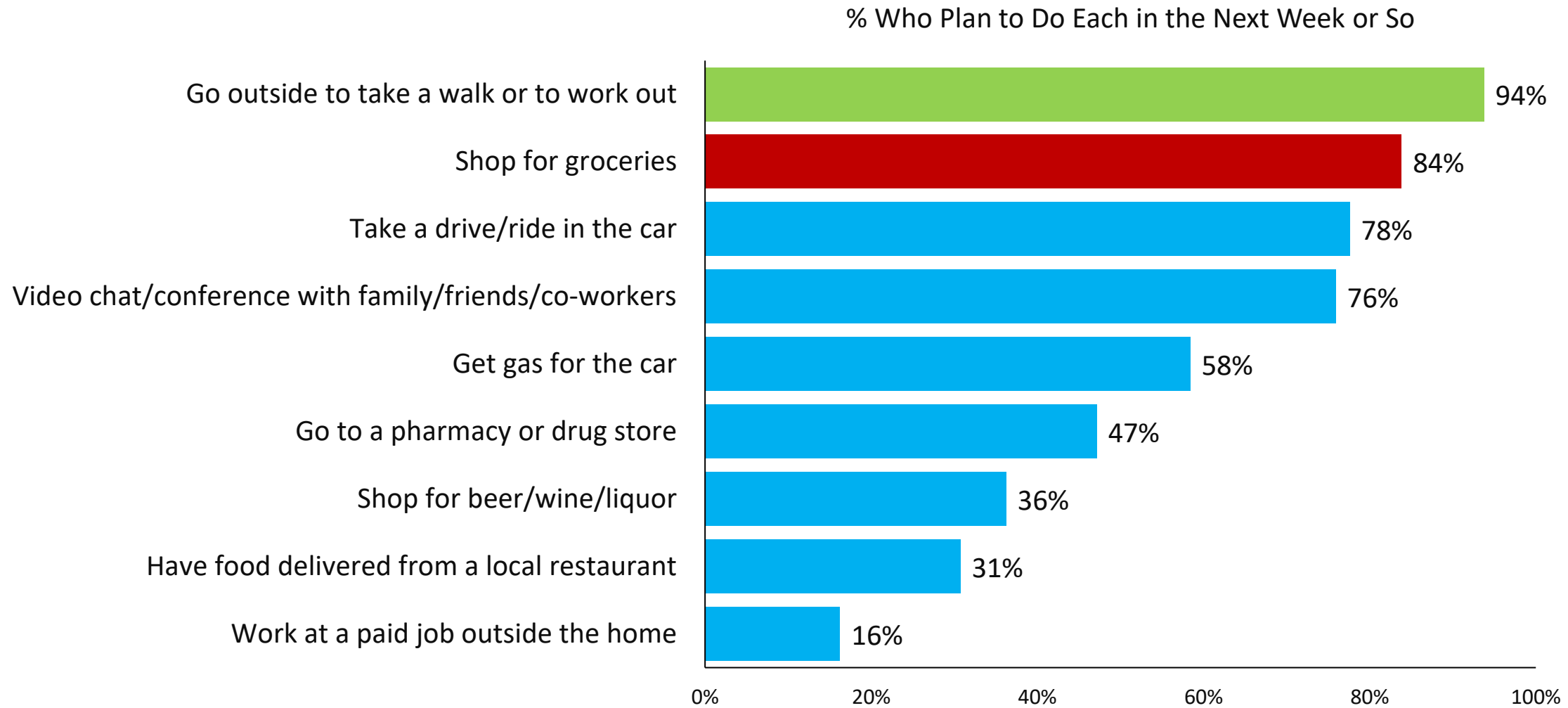
"At this time, how often are you personally listening to music as an escape?"





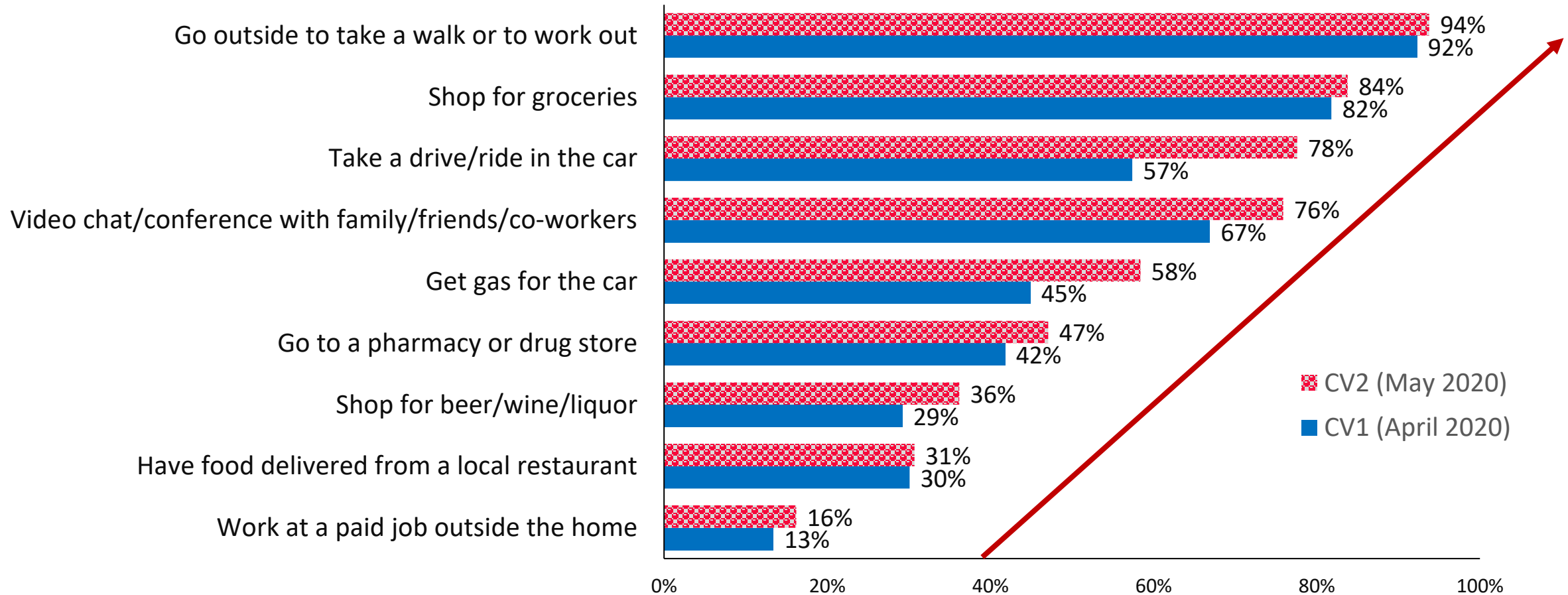
Consumer Buying & Shopping Behavior

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



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

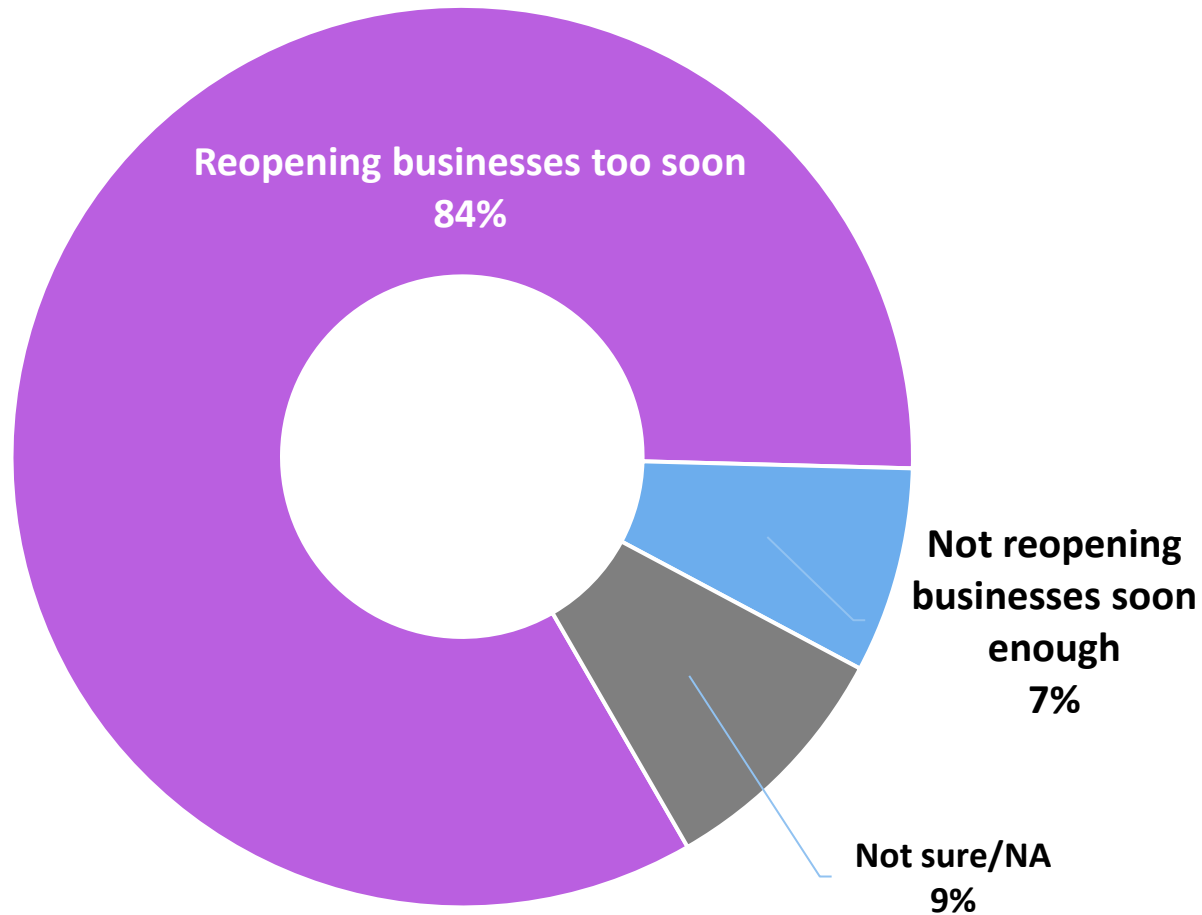
% Who Plan to Do Each in the Next Week or So





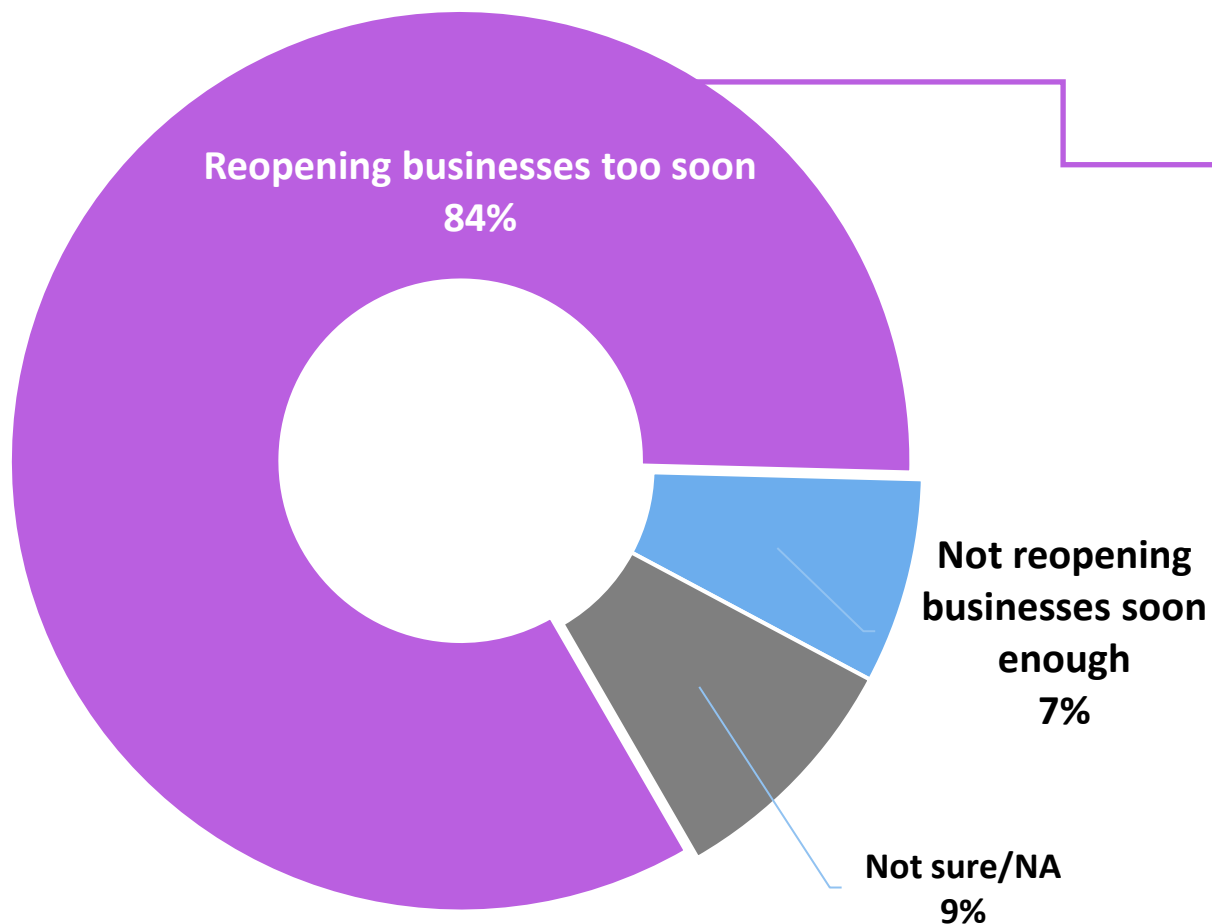
Interest in Activities vs. Risk

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

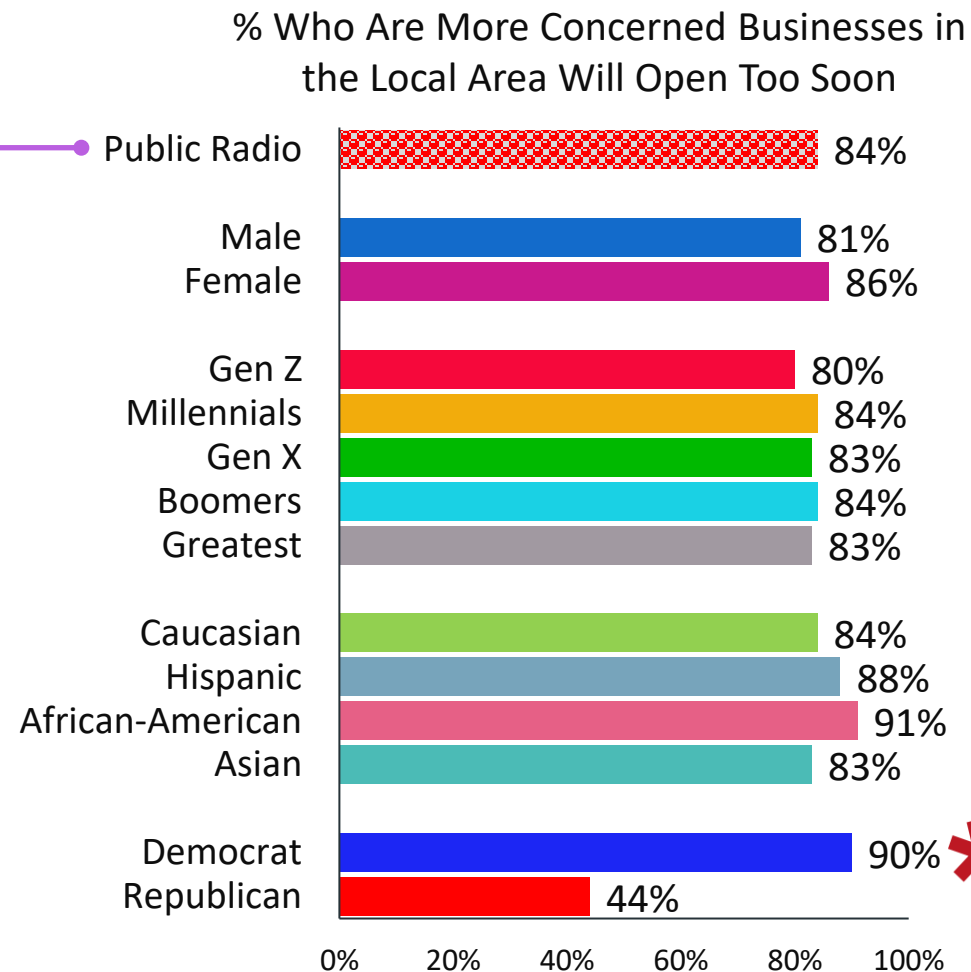


"Which of the following is a bigger concern to you in your local area?"

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

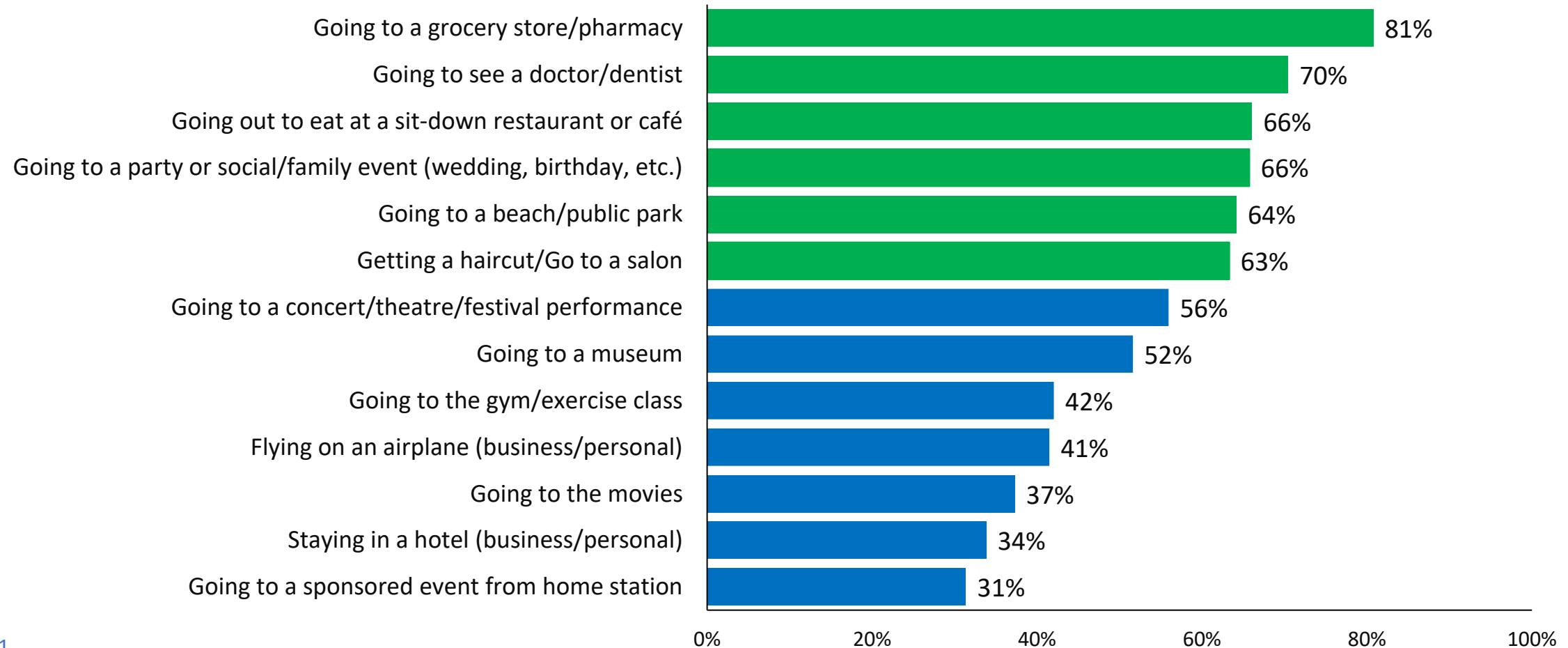


"Which of the following is a bigger concern to you in your local area?"

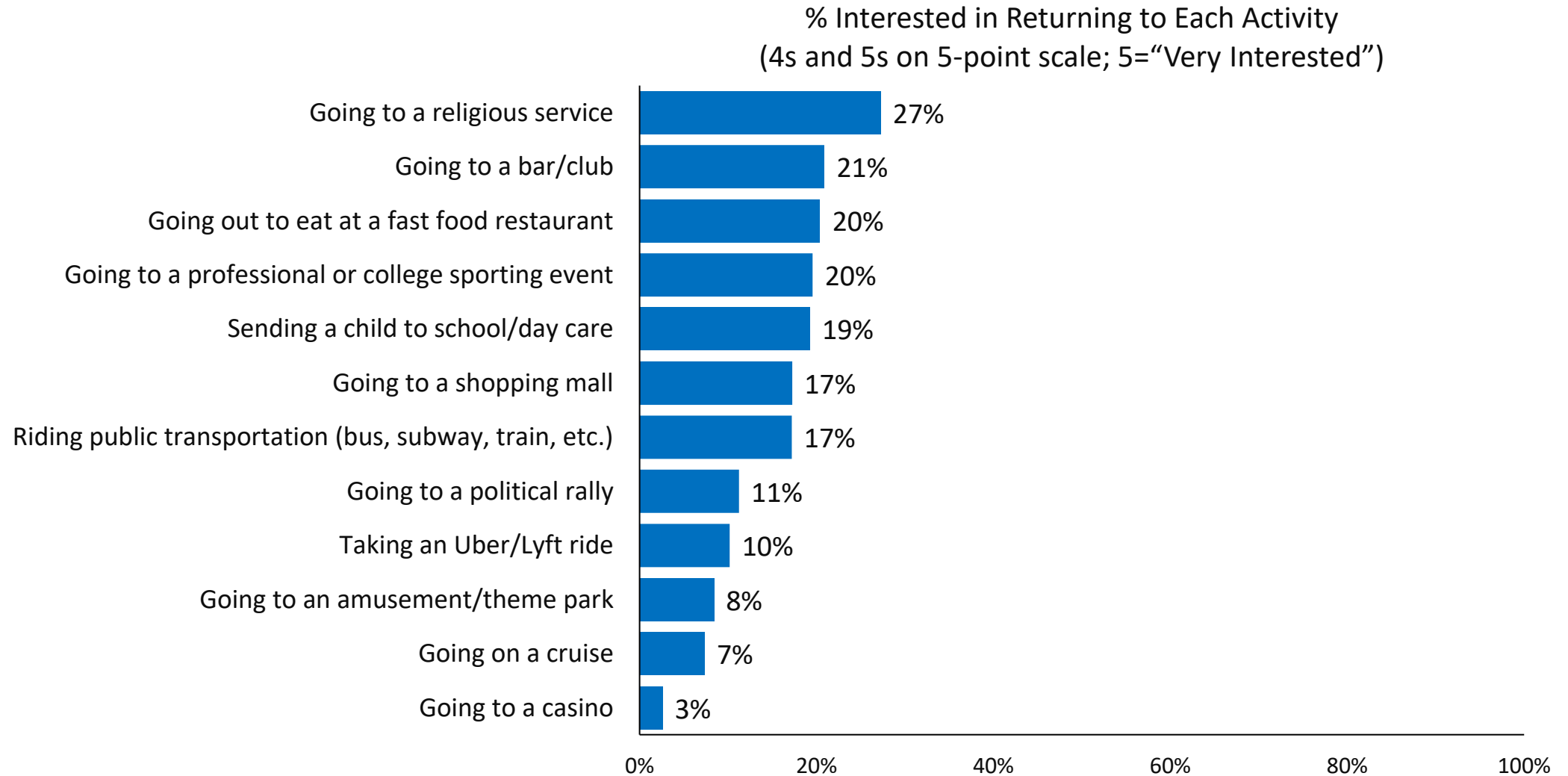


Grocery Shopping and Visiting a Doctor/Dentist Are the Activities With Highest Interest in Resuming

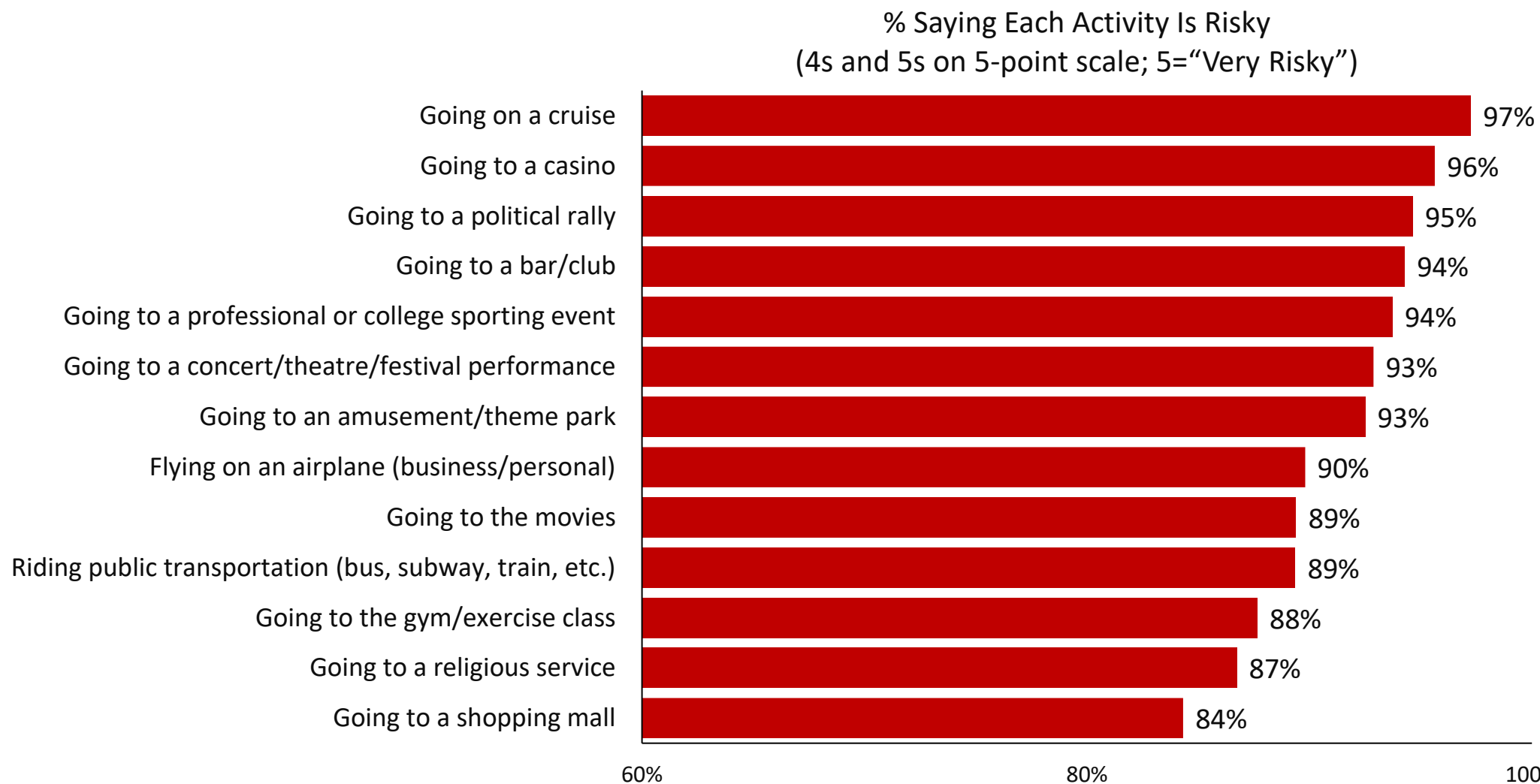
% Interested in Returning to Each Activity
(4s and 5s on 5-point scale; 5="Very Interested")



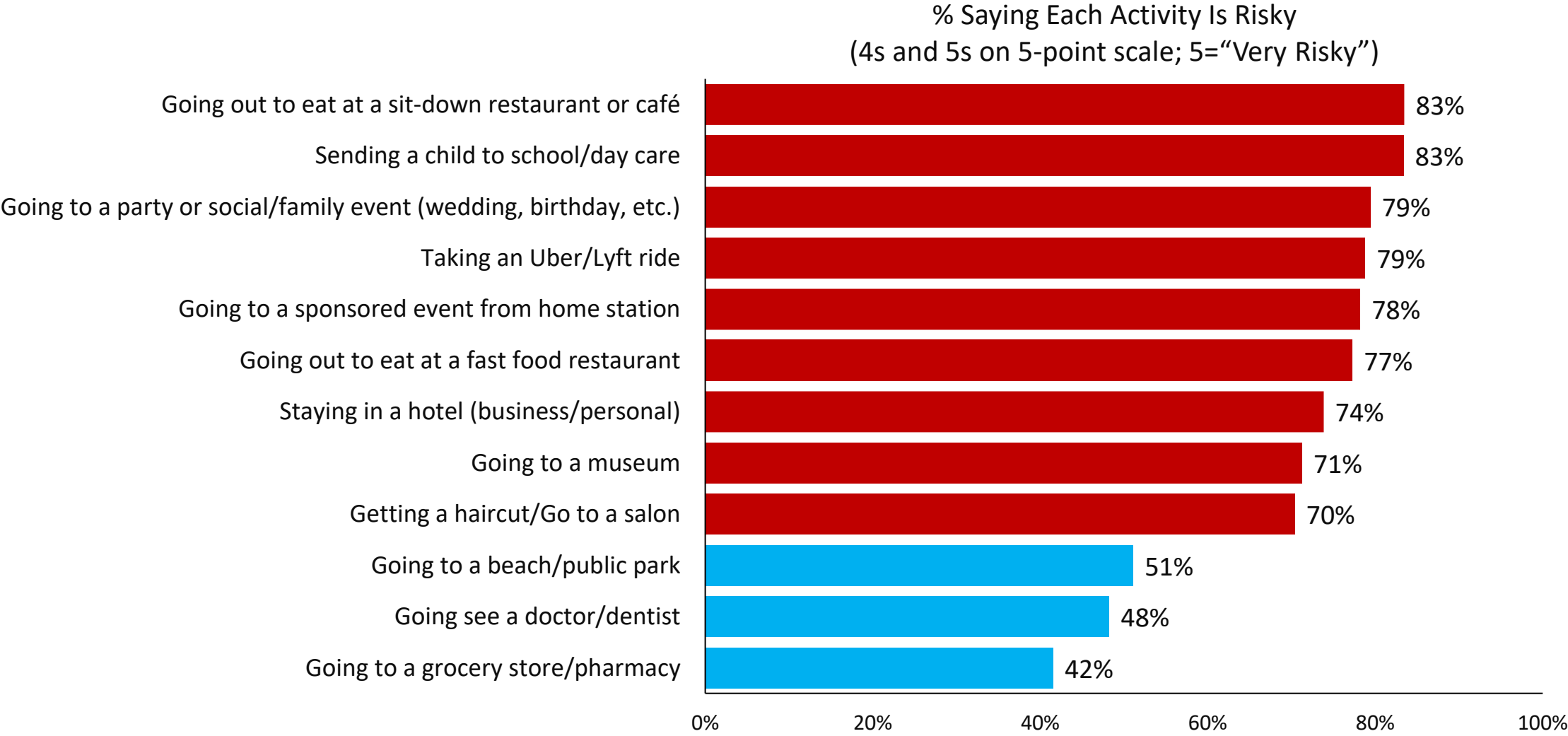
Casinos, Cruises, and Amusement/Theme Parks Are Currently of Least Interest to Public Radio Listeners



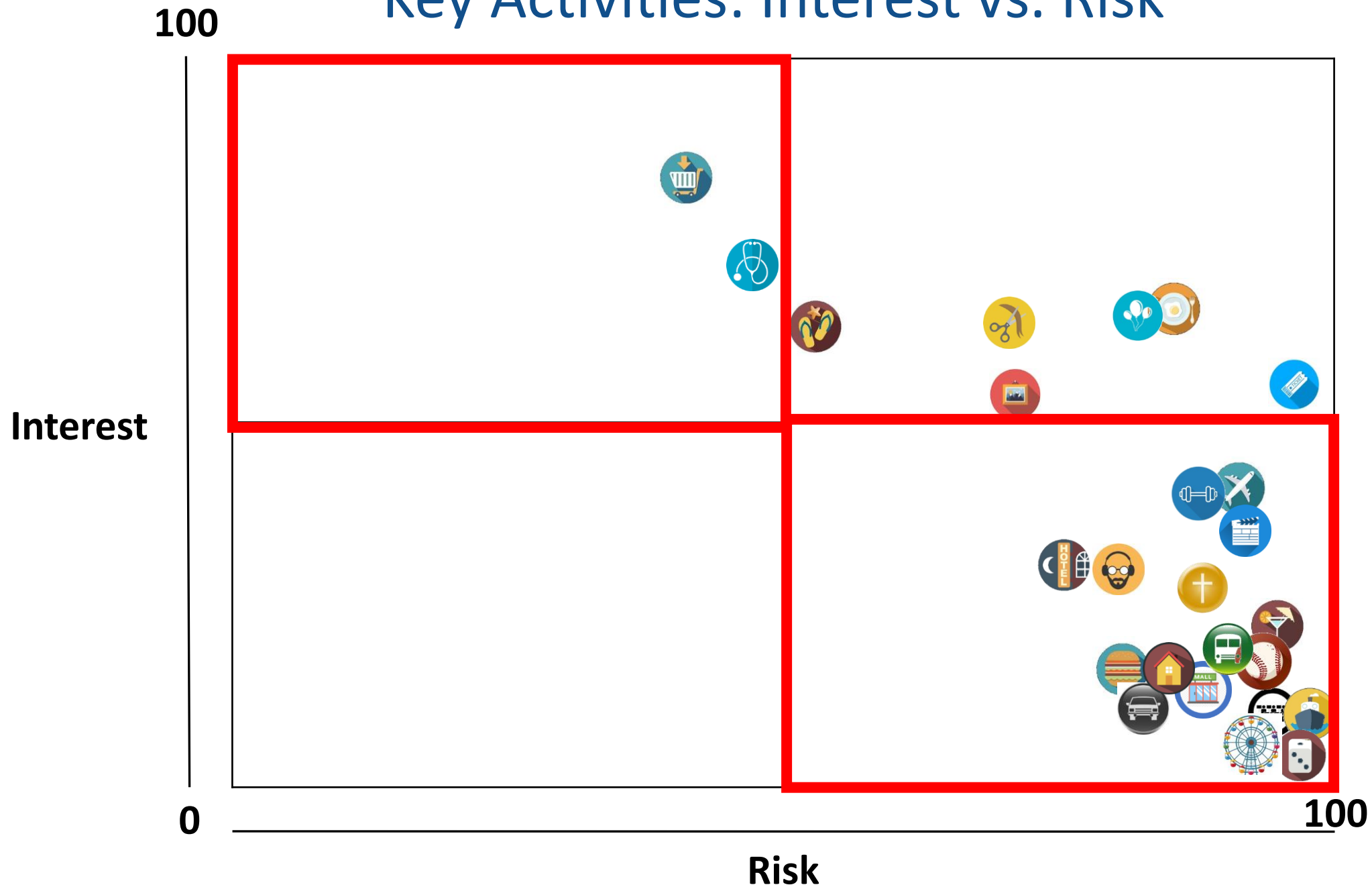
Many Activities Are Currently Seen as Very or Somewhat Risky by Nearly All Respondents



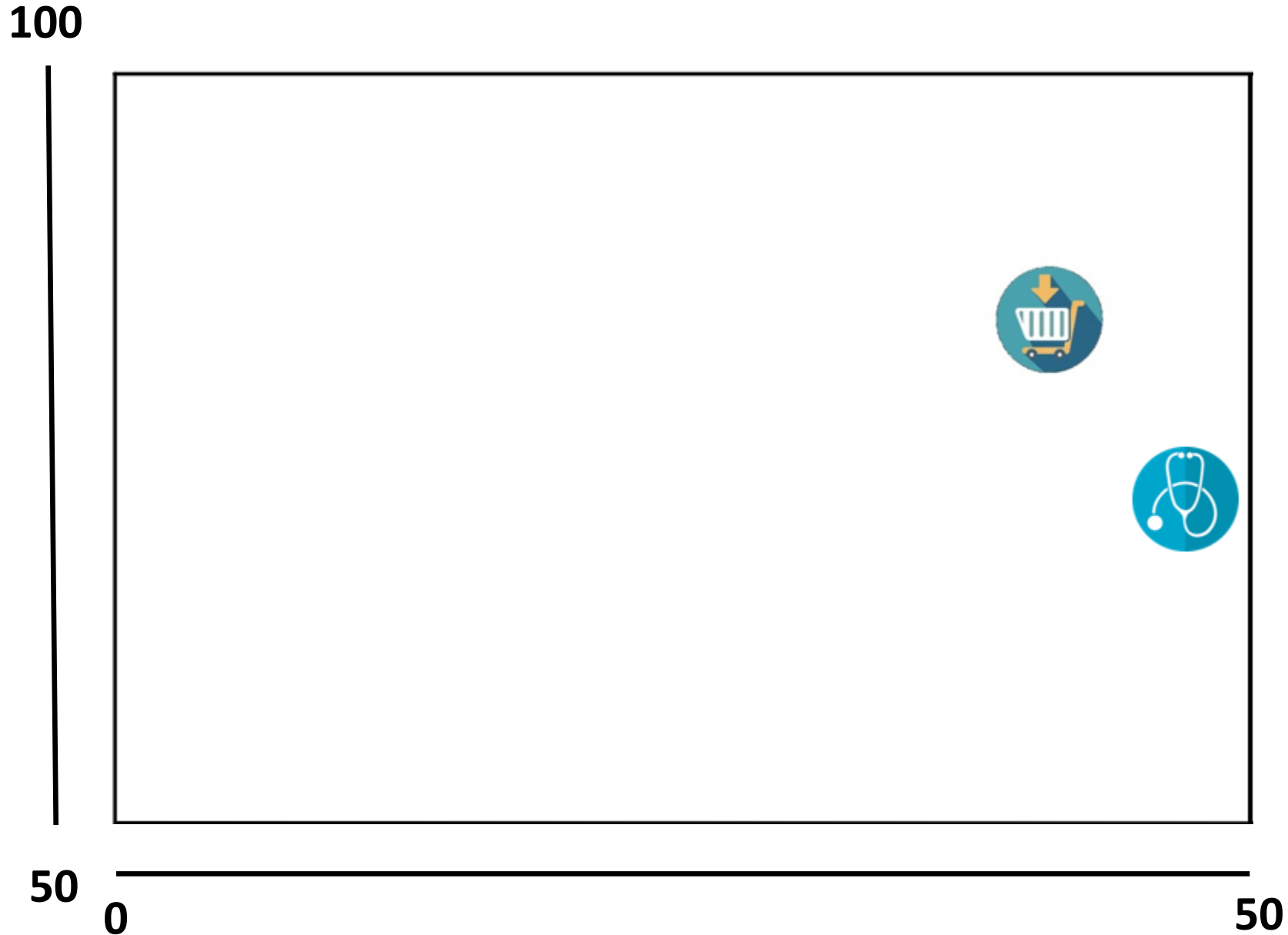
The “Least Risky” Activities: Going to a Grocery Store/Pharmacy, Visiting a Doctor/Dentist, and Going to a Beach or Park



Key Activities: Interest vs. Risk

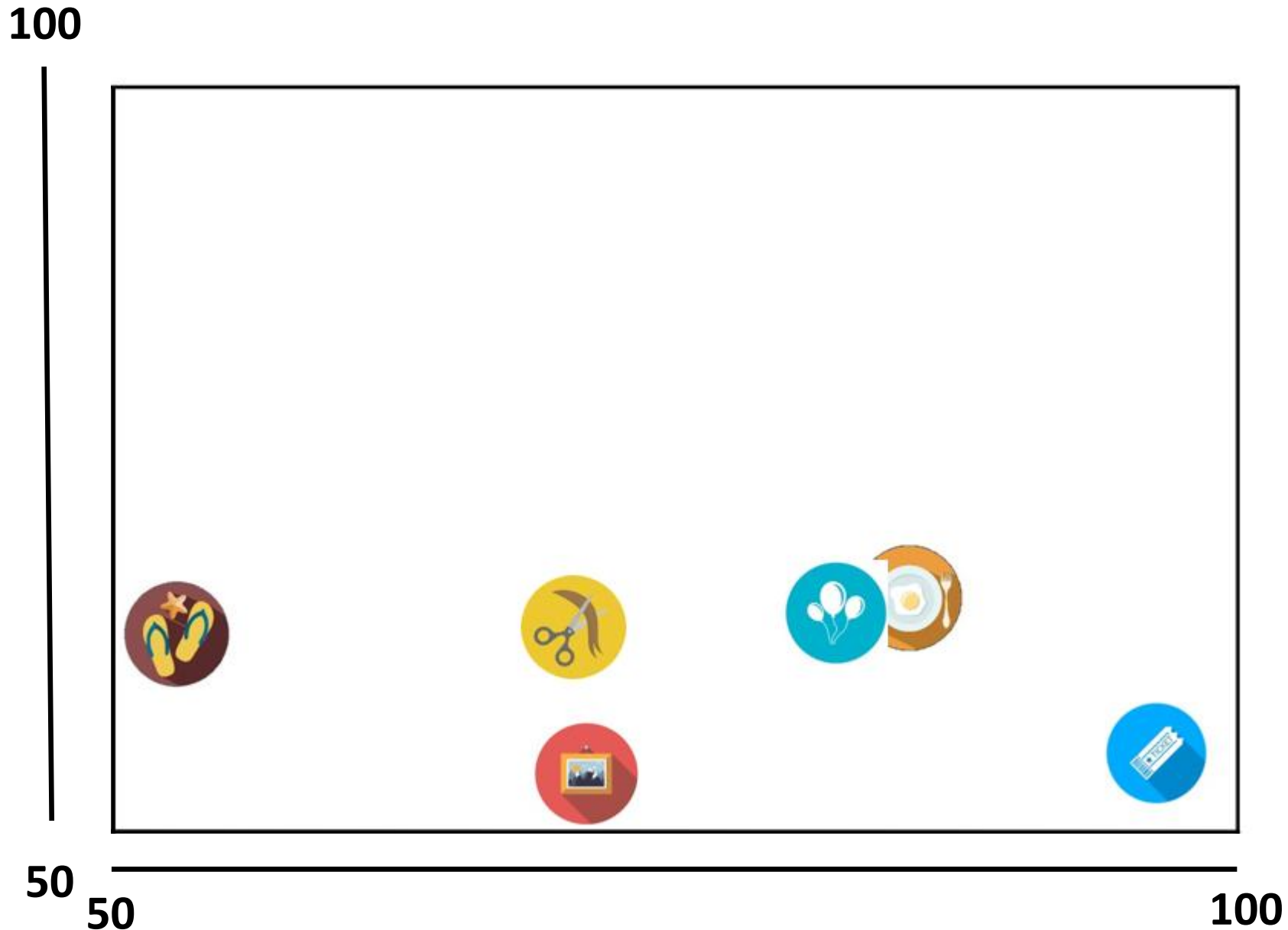


Key Activities: High Interest/Low Risk



Grocery/Pharmacy	
Doctor/Dentist	

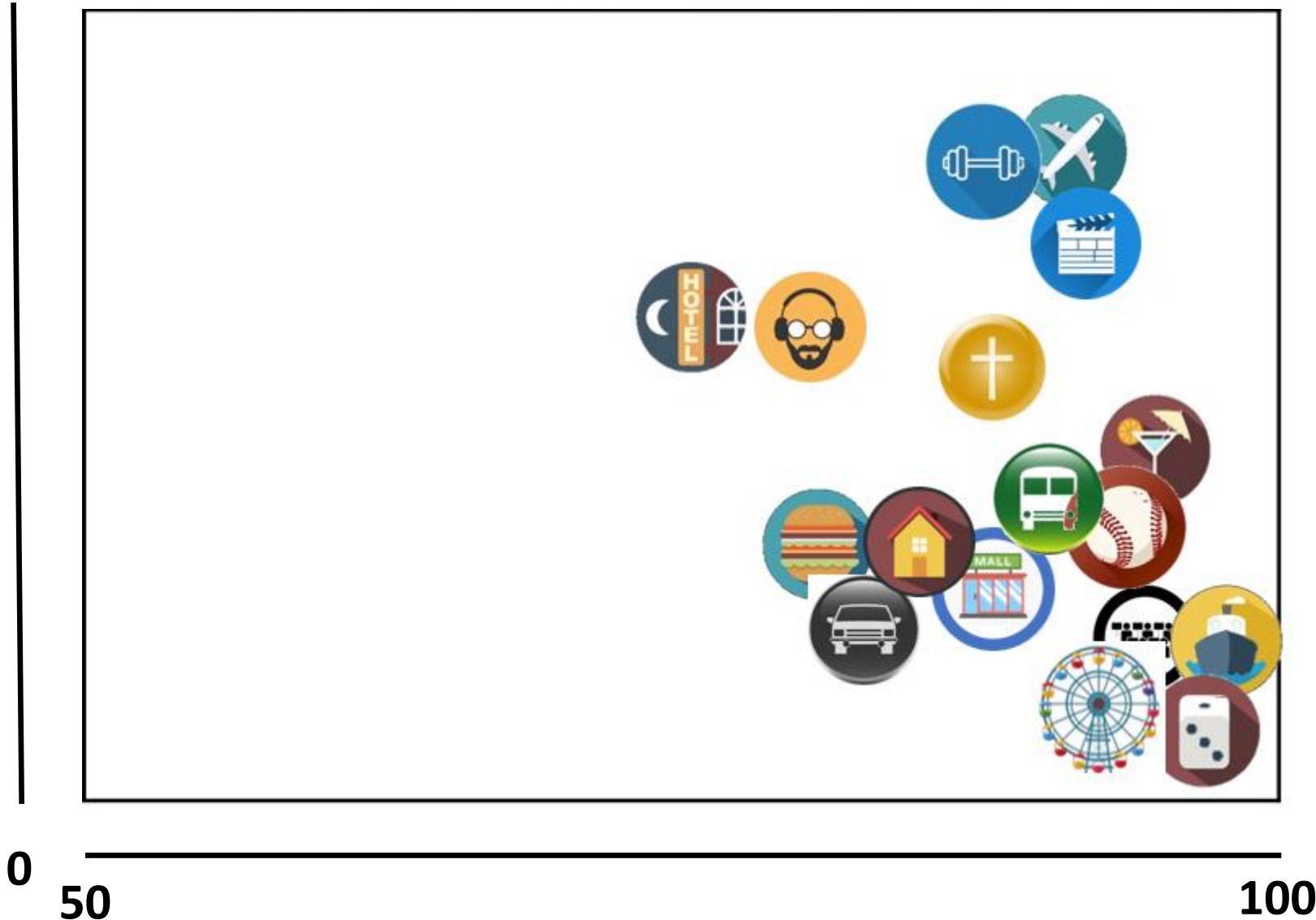
Key Activities: High Interest/High Risk




















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

Key Activities: Low Interest/High Risk

50



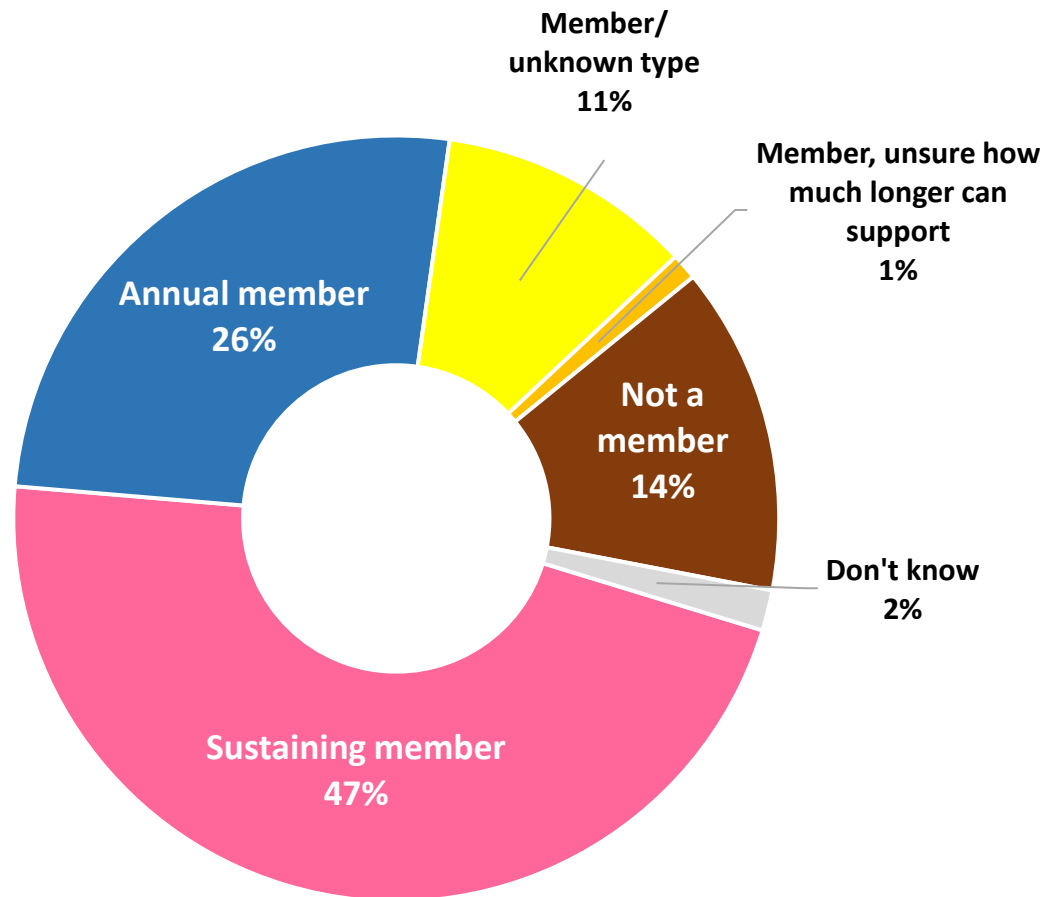
Fast food	
Stay At hotel	
Radio station event	
Religious service	
Uber/Lyft	
Gym/Exercise class	
Movie	
Mall	
School/Daycare	
Amusement park	
Casino	
Public transportation	
Bar	
Sports event	
Airplane travel	
Cruise	
Political rally	



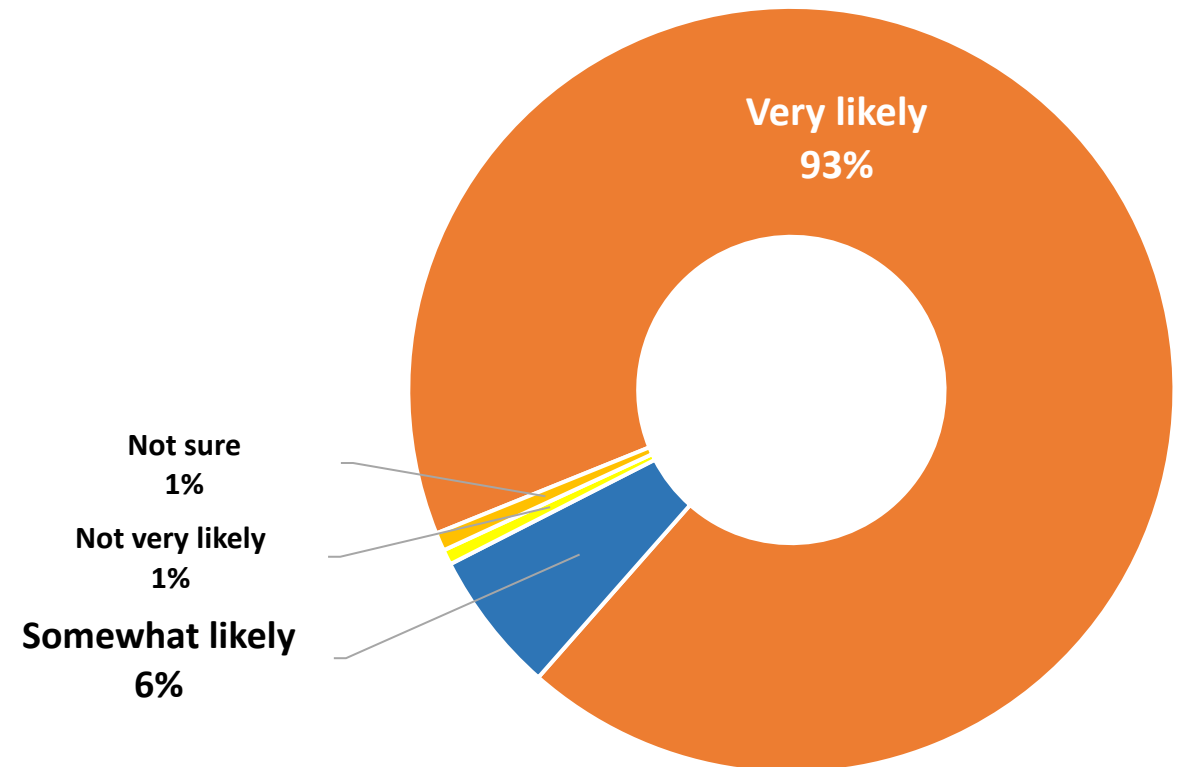
Membership and Fundraising

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

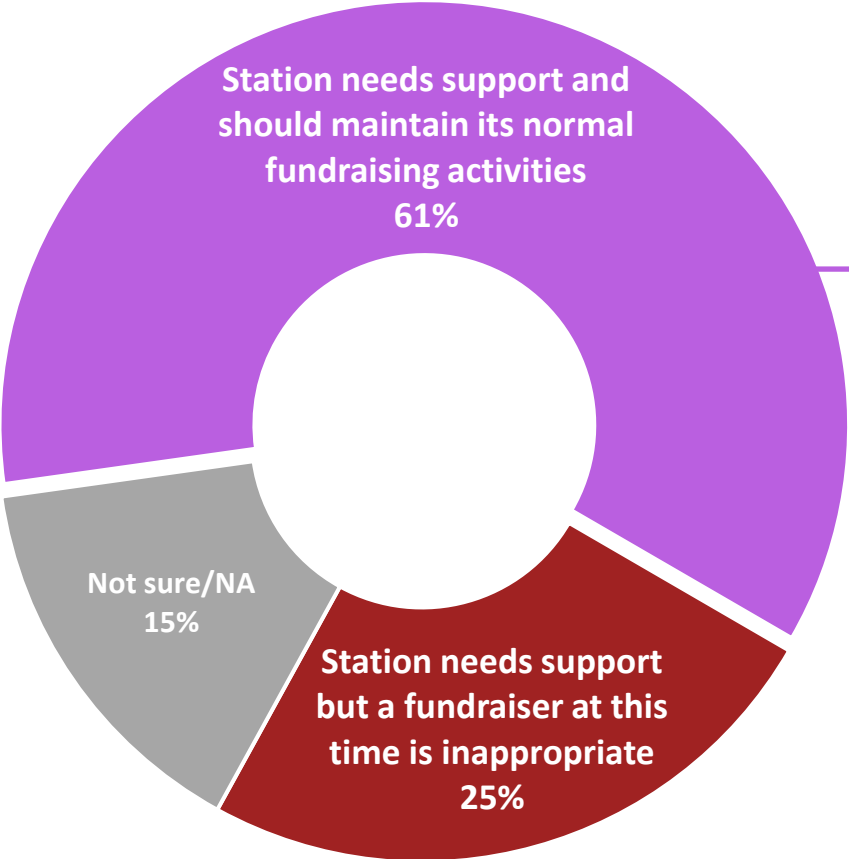
Station Membership



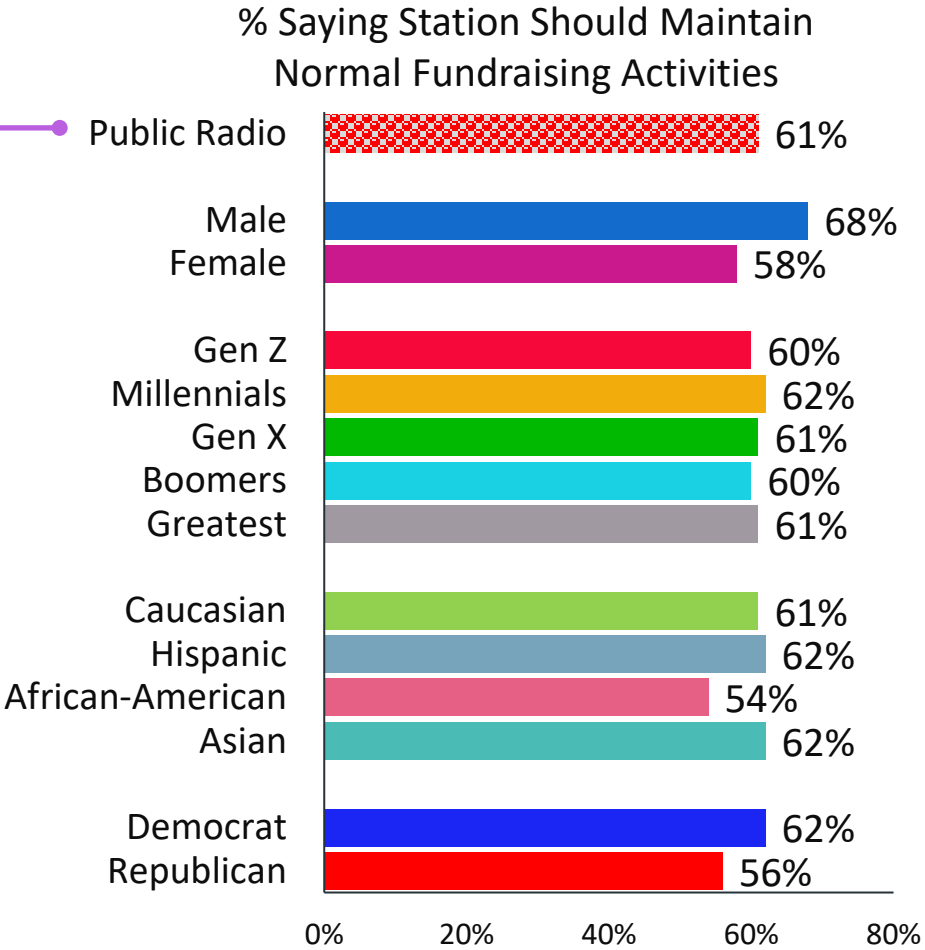
Likelihood to Remain a Member Through End of 2020? (Among Current Members)



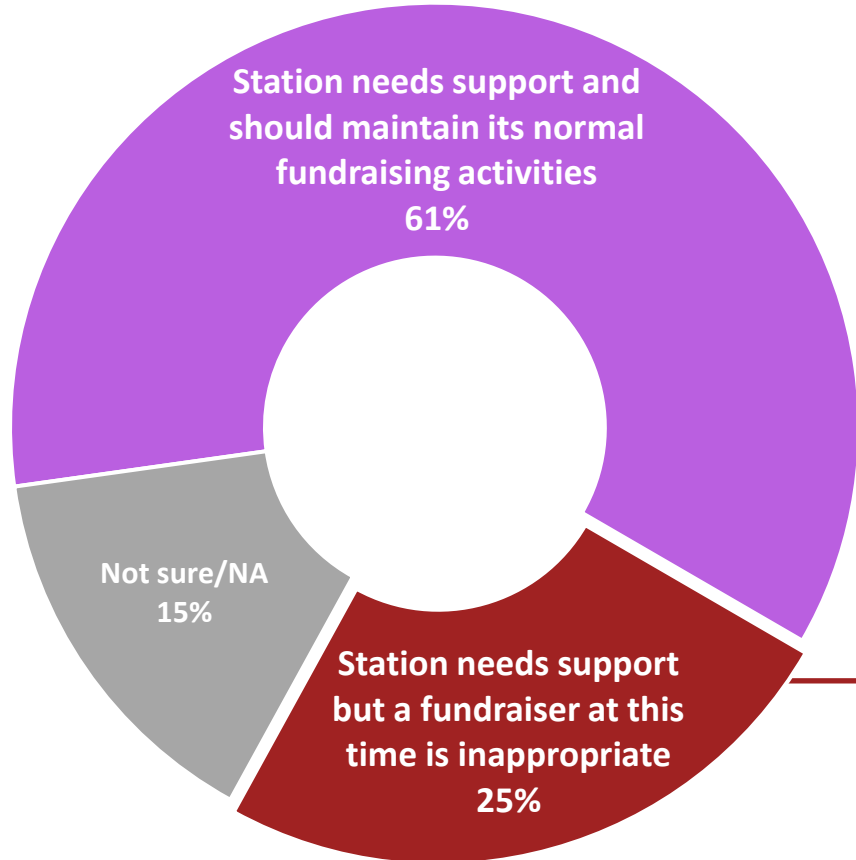
Most Agree Normal Fundraising Can and Should Continue at This Time



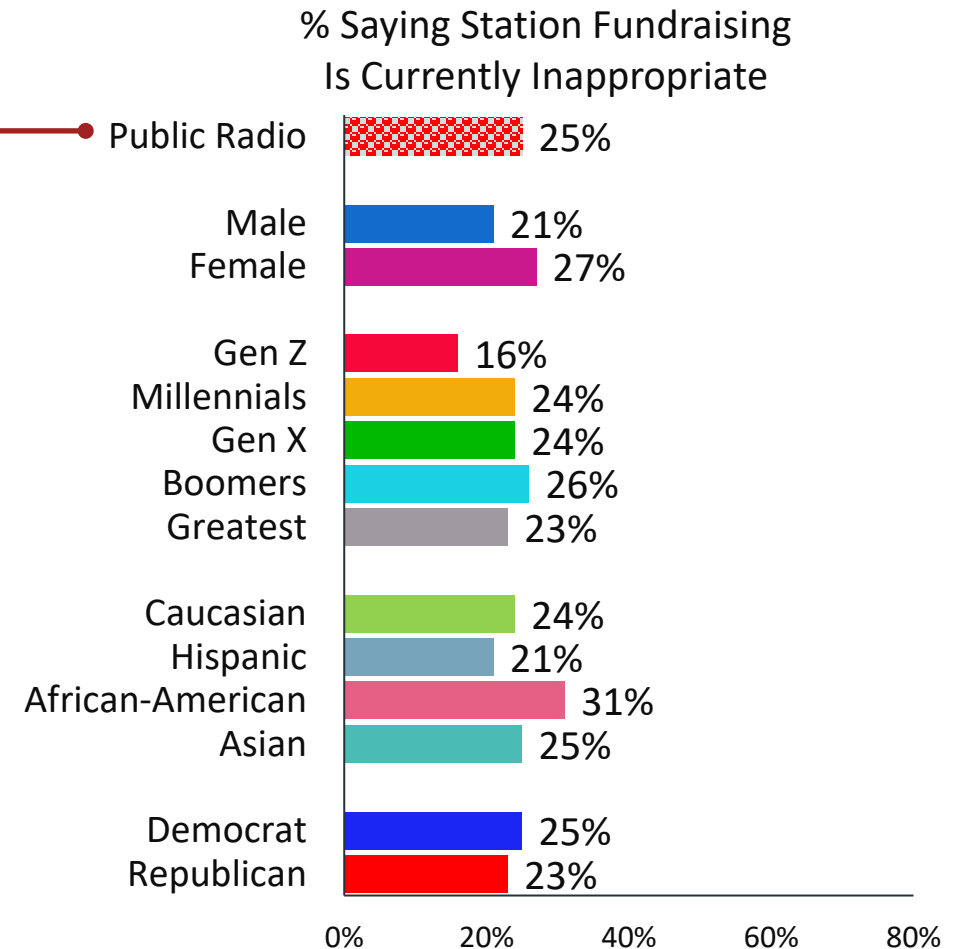
“Which of these statements best describes how THE STATION THAT SENT YOU THIS SURVEY should raise funds during the coronavirus outbreak?”



However, One in Four Say Fundraising Is Currently Inappropriate



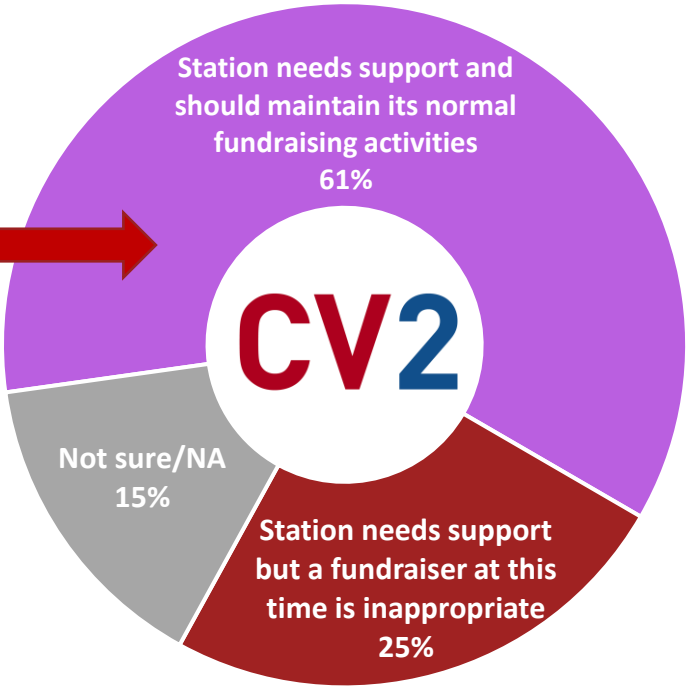
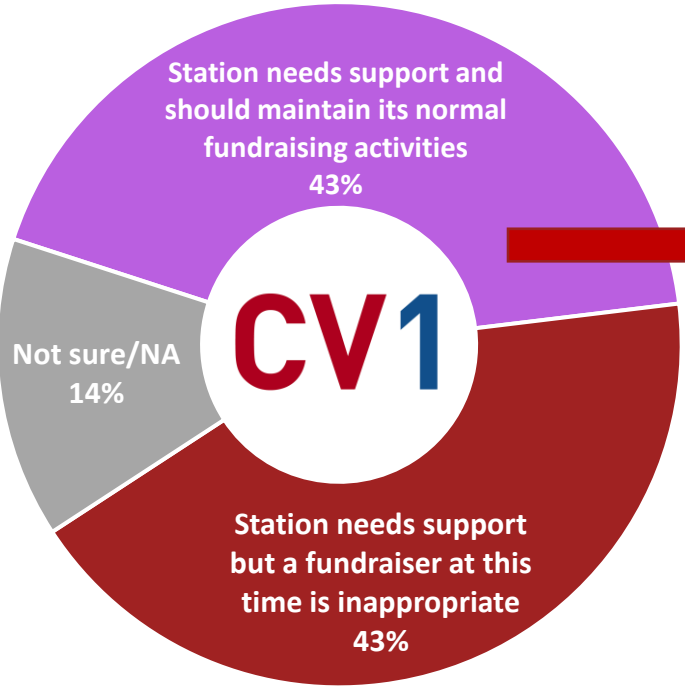
"Which of these statements best describes how THE STATION THAT SENT YOU THIS SURVEY should raise funds during the coronavirus outbreak?"



Fundraising Is Given a “Green Light” Now

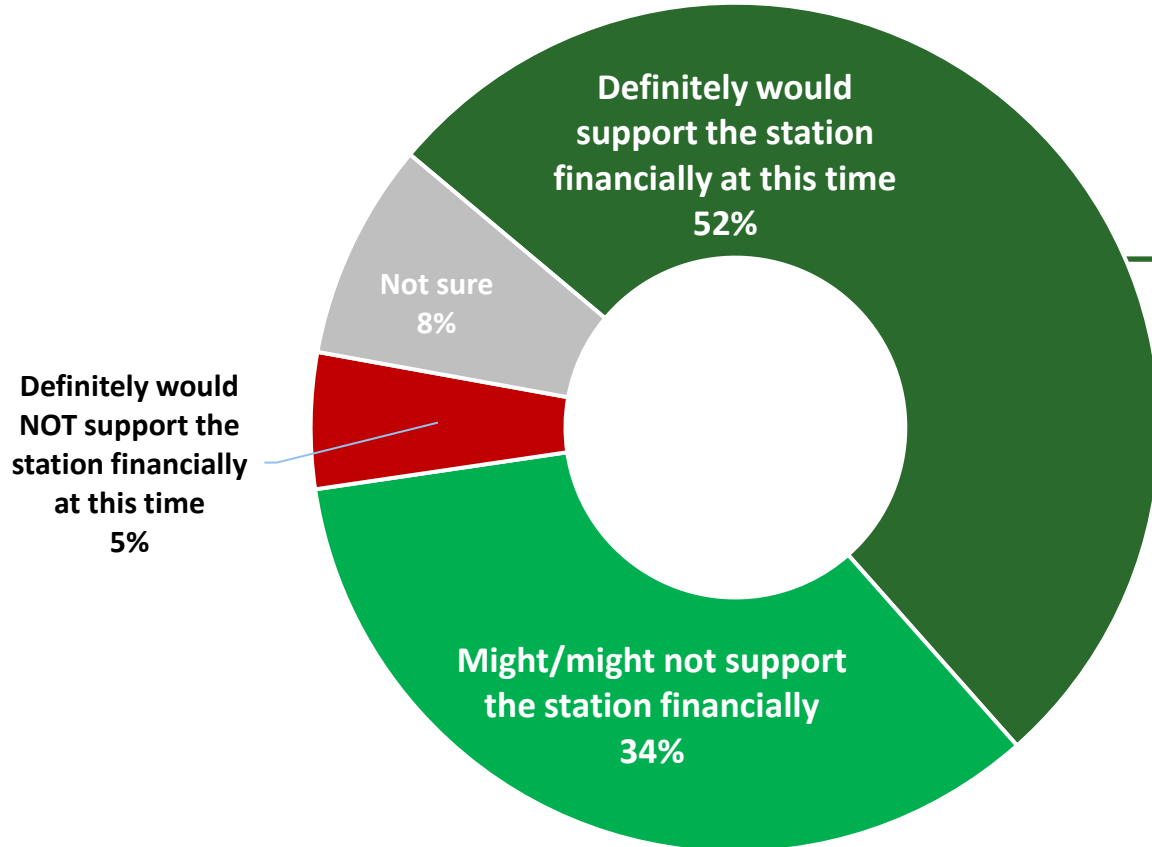
April 2020

May 2020

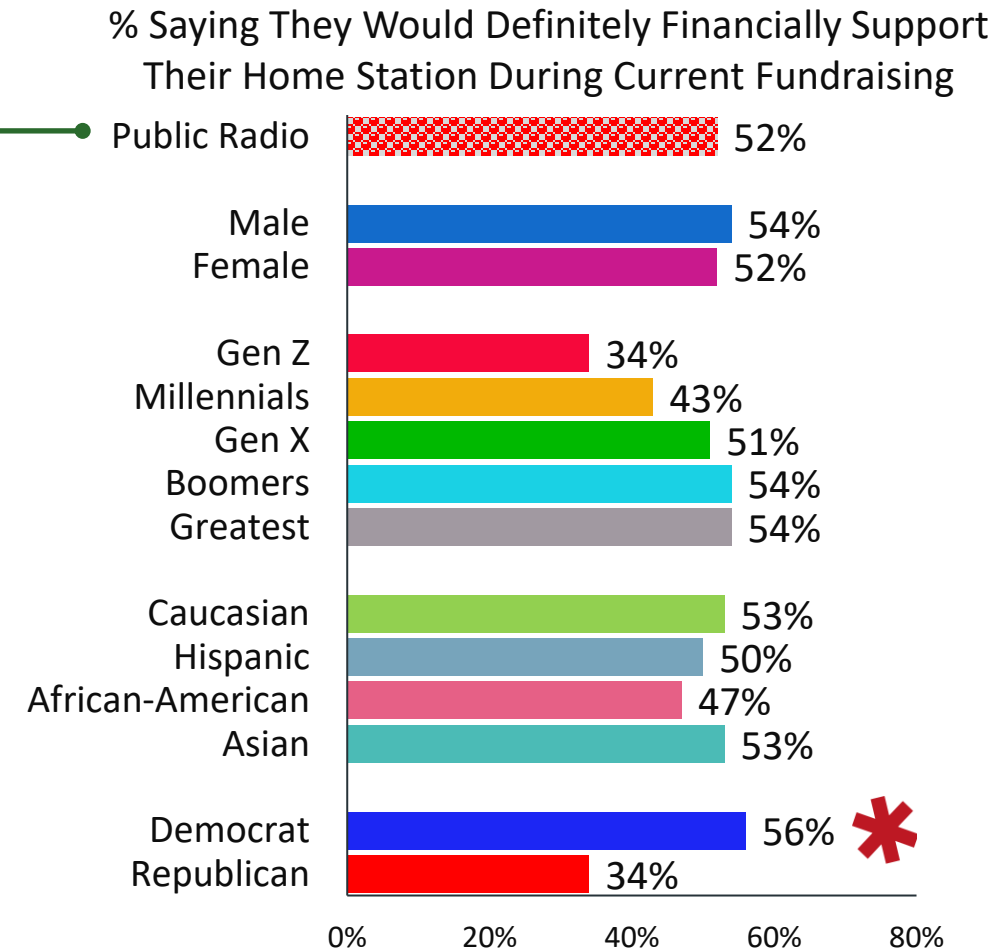


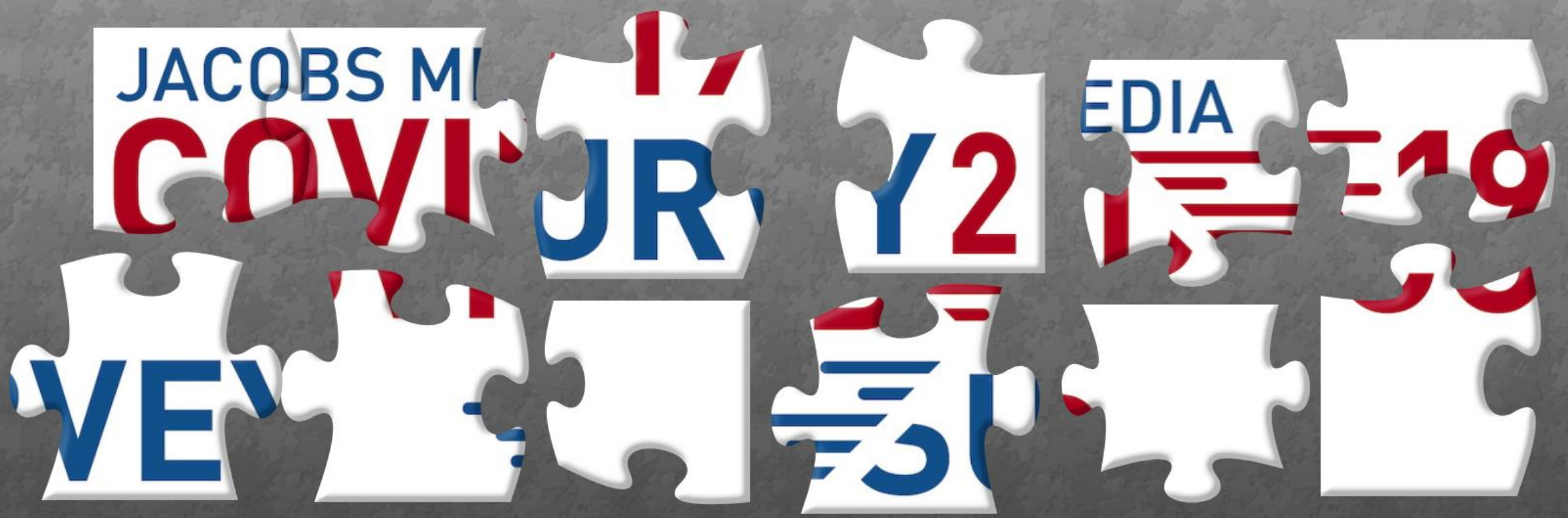
“Which of these statements best describes how THE STATION THAT SENT YOU THIS SURVEY should raise funds during the coronavirus outbreak?”

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



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





Takeaways & Action Steps

Key Findings

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

Key Findings

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

The background is a solid teal color. It is populated with numerous stylized, 3D-rendered microorganisms. These include several spherical viruses with prominent, thick, club-shaped spikes on their surfaces, resembling coronaviruses. There are also smaller, more complex structures that look like bacteria or other types of viruses. The microorganisms are scattered across the frame, with some appearing in sharp focus and others blurred, creating a sense of depth. The overall aesthetic is scientific and modern.

So Now What?

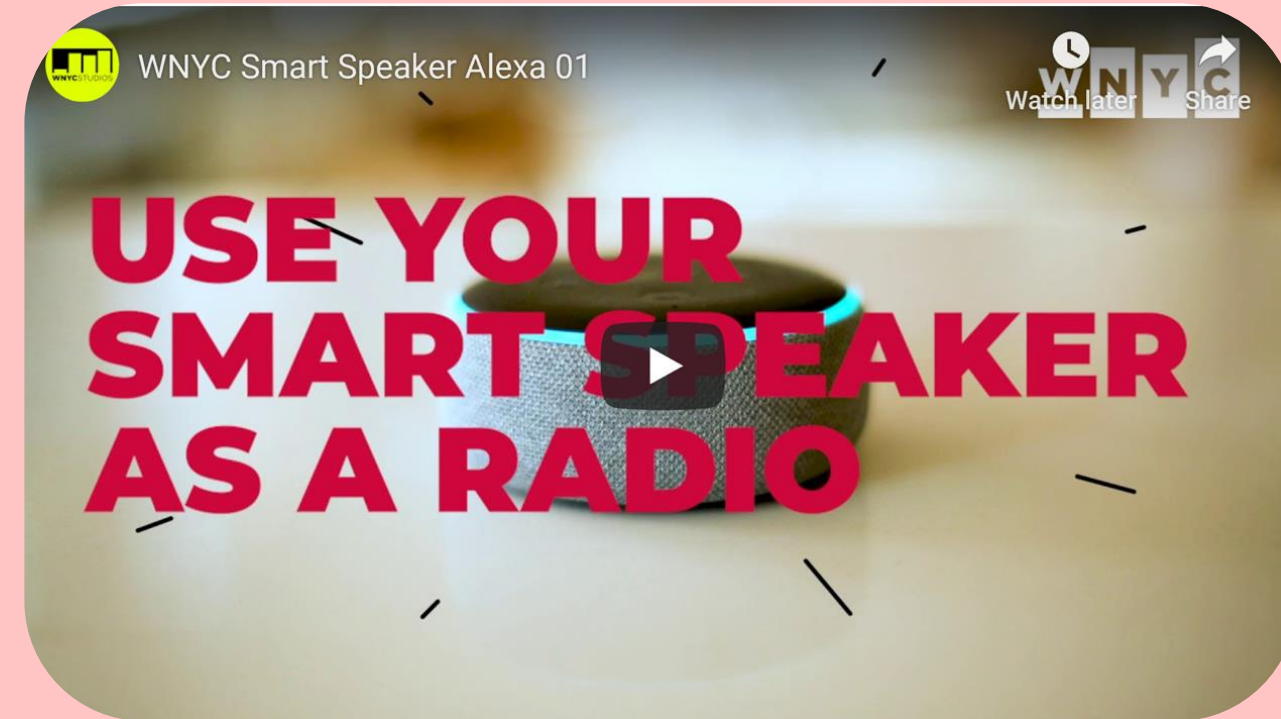
THIS is the “new normal” - Focus on WFH Messaging



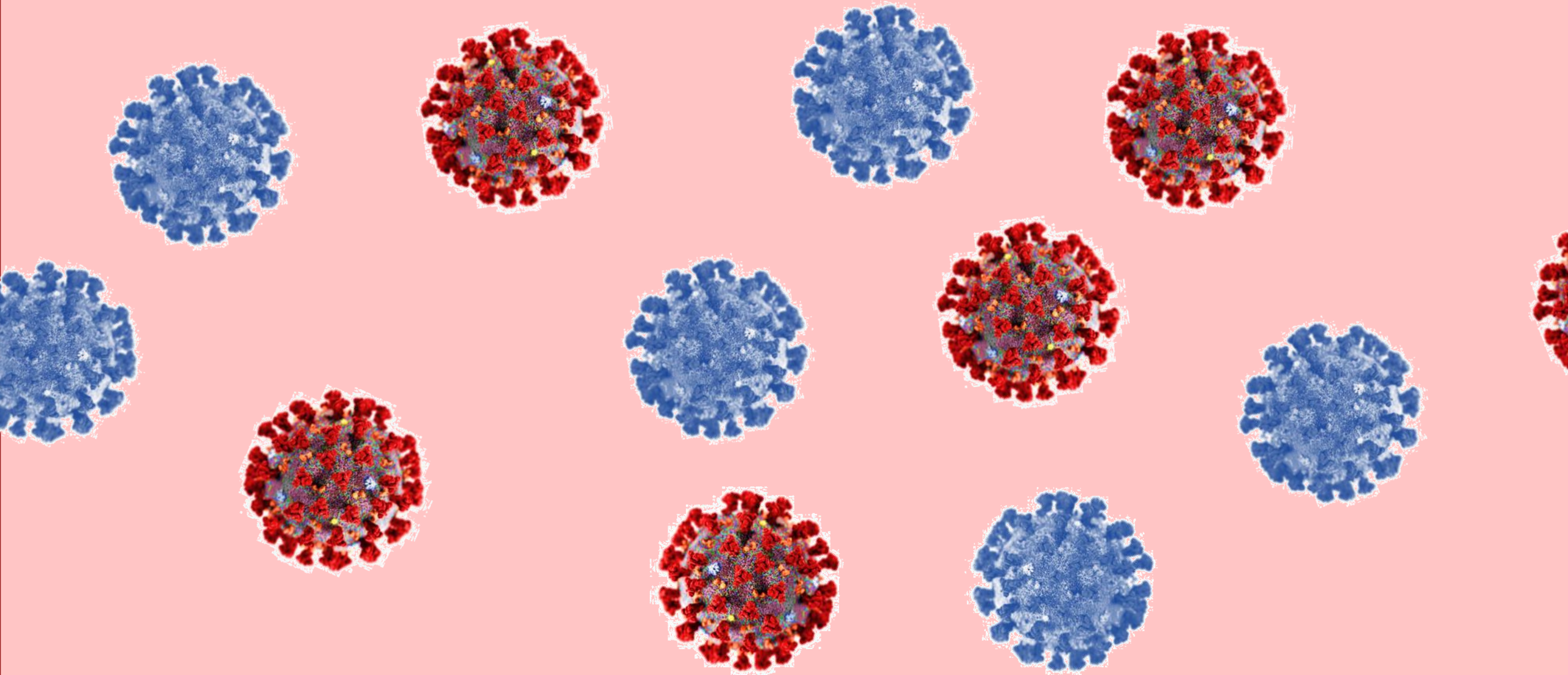
WFH May Likely Change Your Station



Consistently Promote Your Streaming Channels/Gadgets



The Political Divide May Intensify – If That's Possible



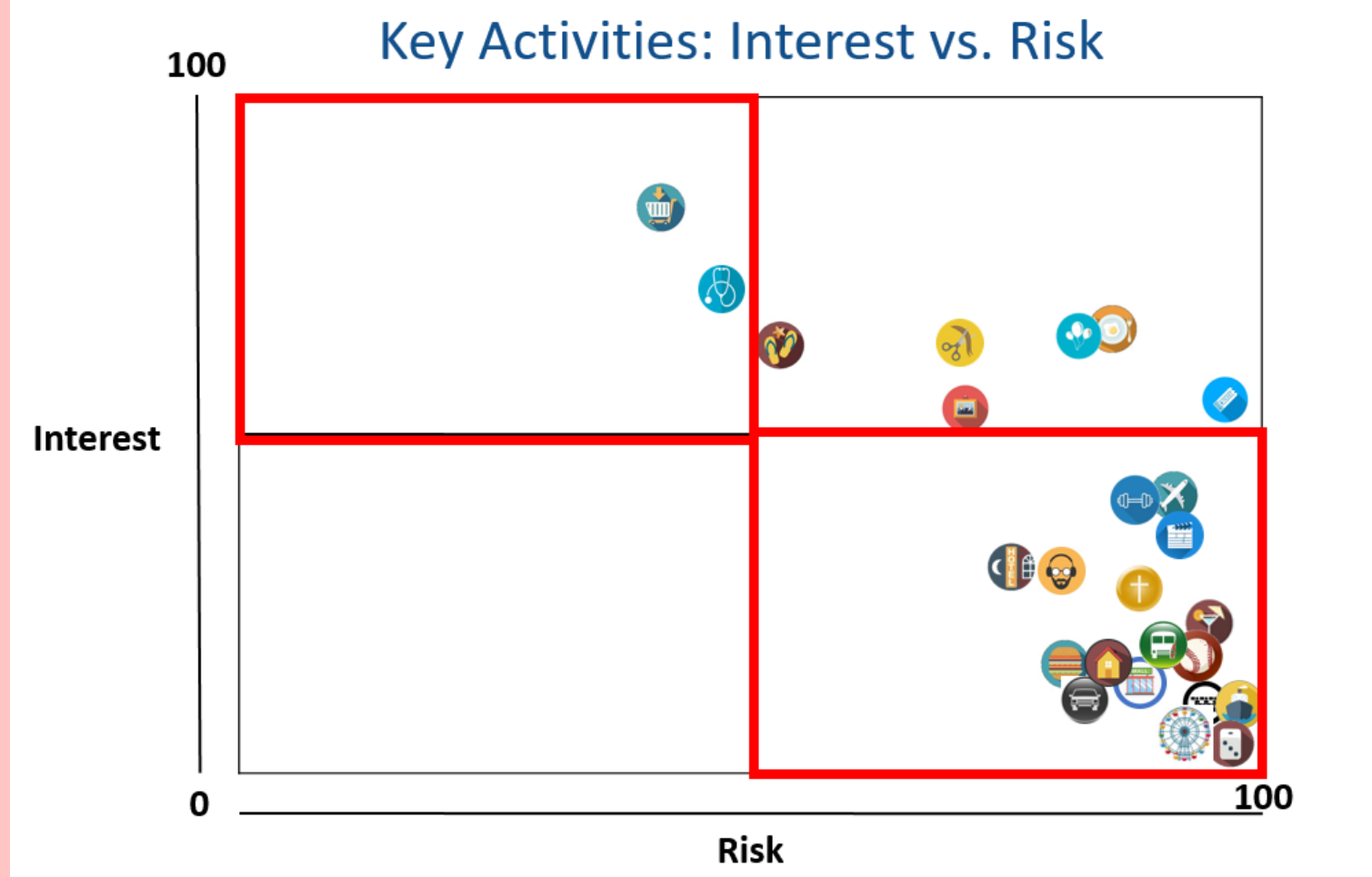
Stay In Your Lane (Especially If You're A Music Station)



Humor And Distraction Are More Desirable Now



Development Can Help Sponsors – Let the Grid Be Your Guide



COVID-19 Themed Podcasts



Keep Up The Good Work!



KQED
15 hrs · 🌐

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

CARTOONING-IN-PLACE
A learn-to-cartoon tutorial series!
... with KQED's own Pulitzer Prize-winning political cartoonist, Mark Fiore.

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Keep Up The Good Work!

#QUARANTINE
HAIKUS



WBEZ

17 hrs · 🌐

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



1.

You write a message to your grad



2.

WBEZ makes a card and posts it to Instagram

3.

Your grad receives a notification!



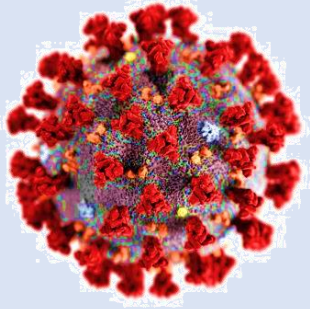
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Insta-Grad-Gram: Let WBEZ Help You Send A Virtual Card To Your 2020 Graduate

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Public Radio's Pathway Through the Pandemic

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May 2020