

An Audience Growth Strategy for Public Media

September 2023

While the past few decades have been successful ones for public radio organizations and stations, significant evolutionary forces are conspiring to create headwinds that need to be confronted to ensure future success. This great run by public radio has been driven by a commitment to its core mission, unique and compelling content, and outstanding journalism. In concert with local affiliates, NPR, PBS, APM, the BBC, and independent producers have collaborated on stellar programming and seamless distribution. An impressive, loyal audience has been nurtured, accounting for consistent listening, as well as generous financial support.

At the station level, success has been spottier, particularly in the areas of local news and audience diversity. Some public radio organizations have excelled, stepping up with strong local programming. In many other markets, stations produce very little of their own programming focused on their communities, relying instead on network and syndicated content. And even when stations produce homegrown programming, it typically caters to core public radio consumers, rather than attempting to serve new and more diverse constituencies.

A challenge that public radio has historically faced is the identification of new audience streams, as well as developing ways in which to market and attract them, with the goal of ultimately converting them into listeners...and members. Too often, public radio organizations have grown insular, programming to the “usual suspects.”

We are bullish on the future of public radio, but only if the system expands its focus on audience and content development. Overall, public radio brands are strong, and many are market leaders. At a time when competitive media are facing significant headwinds, public radio is well positioned to meet the challenges it will encounter in an admittedly uncertain future.

But how to architect new programming initiatives that cater to new audiences, yet remain congruent with public radio’s core mission? Where is the road map that informs affiliate stations about their best courses of action for building new and diverse listening communities without harming the “mothership?”

This summer, SRG, PRPD, and Greater Public collaborated to publish the “Public Radio Playbook,” recommendations based on an aggregation of existing research and analysis to help the public radio system identify its strengths along with its shortcomings and opportunities. The “Meta-Analysis,” put together by City Square Associates, culls key findings across more than two dozen research studies, seeking common threads and consistent findings. The “Playbook” is a clarion call for local public radio stations to

conduct their own proprietary, in-market research that can identify in-market gaps and opportunities.

As their findings make clear, there are a number of “critical knowledge gaps” hampering most stations’ abilities to architect smart, strategic plans. As a result, public radio growth is hindered, including content creation, sponsorship and donations.

Jacobs Media conducted local market surveys utilized in the analysis, so the report’s results came as no surprise to us. We concur that without an investment in a “next adjacent” and/or “audience aspirational” initiative and creating a corresponding development strategy, the road ahead is likely to be an arduous one. Simply serving the same audience with the same familiar content is not a growth strategy and has the potential to create significant instability for public radio if not properly addressed.

As the “Playbook” report states, “A purely demographic focus on age, race, and ethnicity assumes that these segments – ‘young’ adults or BIPOC audiences – think and act monolithically. If the goal of audience growth for public radio is to engage with members of the general public who are not currently engaged with public radio, but have the high potential to do so, the strategies to achieve this should focus instead on thinking about the population *psychographically* – in other words, looking for people who share the same values and interests, and whose values and interests align closely with public radio.”

Our work on these issues began over a year ago, and we applaud the report’s findings and recommendations because they lay out a cogent, studious approach. That is the essential focus and approach of the research initiative we have developed and begun to field test.

It is painfully obvious neither broadcast radio nor television is growing, especially as it concerns traditional (terrestrial) usage and linear program schedules. The creation of digital content, new media assets, and innovative content platforms is essential to expanding and diversifying the audience. Nevertheless, identifying the optimal strategies to pursue and who to target has proved challenging for many public radio organizations as they balance their legacy brand offerings while attempting to map out a viable broadcast and digital plan moving forward.

The problem is too many have been guided by their intuitions and aspirations, rather than utilizing audience research to identify pathways, needs, and opportunities.

The Goal of The Project

The purpose of this project is to answer these questions:

1. How can public radio stations accurately identify their next generation of listeners, and what are the best avenues in which to appeal and engage with them?

2. Who are these consumers, how do they inform and entertain themselves, and on which platforms are they most comfortable?
3. What are the common demographic and psychographic threads that bring potential new and diverse audiences into the same brand with public radio’s existing core constituency?

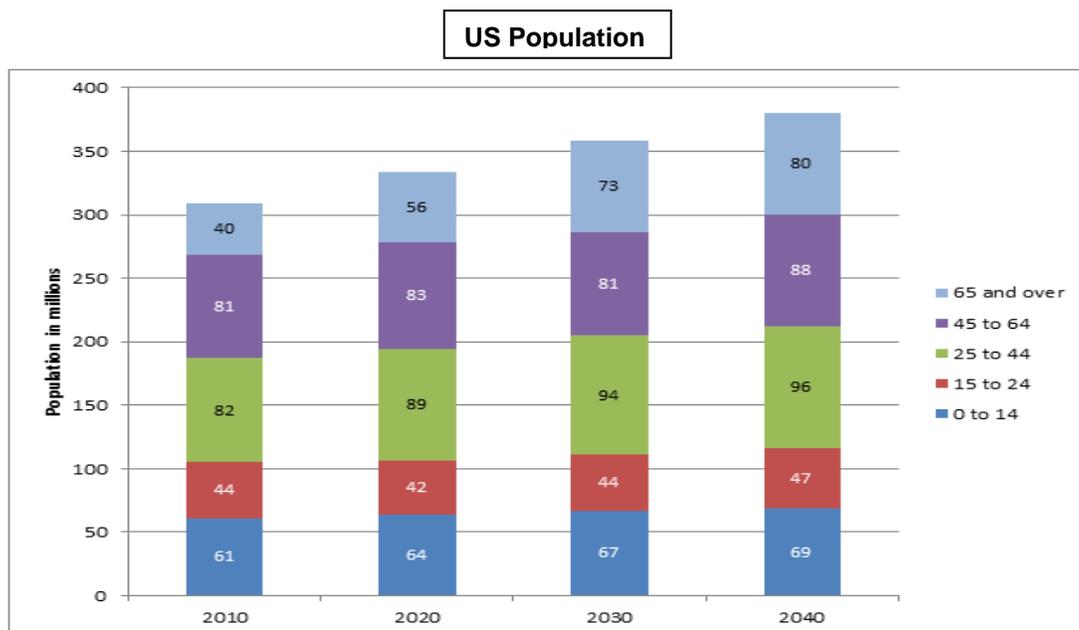
Our plan is to take this challenge head-on by creating a tested, custom solution that can be implemented at any public radio organization. This “adjacent opportunity research” has been crafted to lean into these challenges and opportunities.

The Current State of Public Media

By many accounts, public radio is healthy. It has a sizable, passionate, and loyal audience, many of whom consistently donate to their local stations. Public radio provides high quality news programs from NPR, PBS, the BBC, APM, PRX, and independent producers. Moreover, in many local markets, the competition from newspapers, commercial radio, and television has declined, in some cases significantly, creating a hole to be filled. While some local public radio stations have developed strong programming, many shows are aging and/or don’t comprise as much of the program schedule as they could.

Looking ahead, there are several significant megatrends that, if not addressed, could lead to declining audience, funding, and relevance for public radio stations. These include:

Demographics – The current audience of most public radio stations is comprised of an overwhelming majority of white Baby Boomers. This has been the makeup of the core audience for decades, generally serving public radio well.

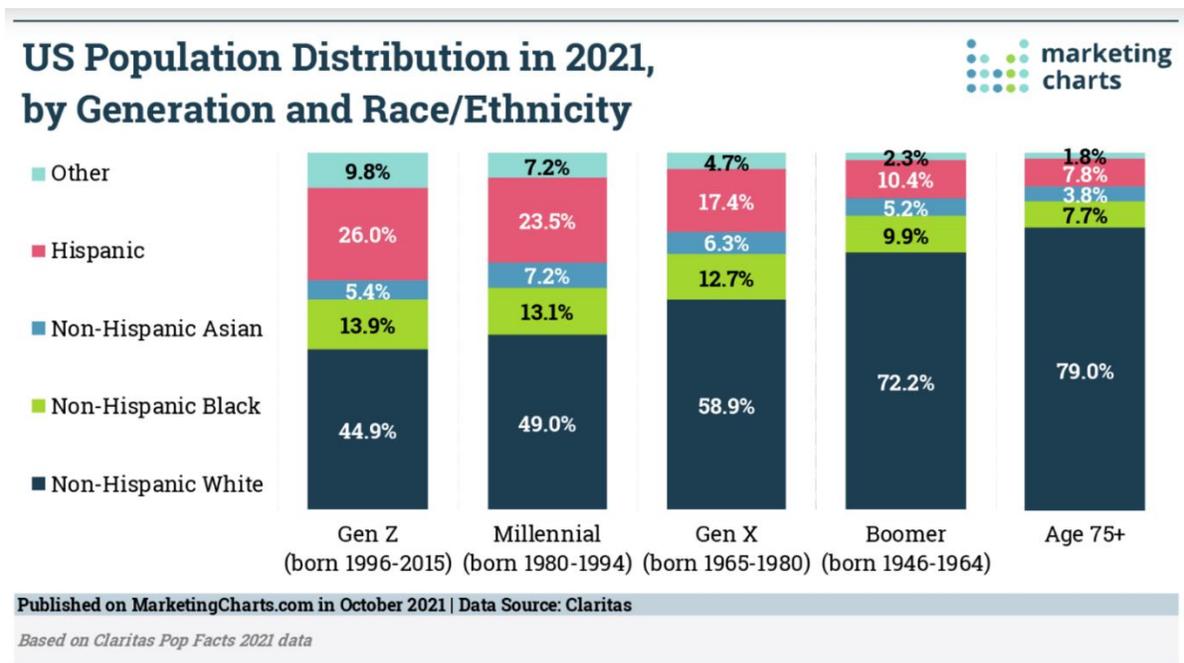


When Baby Boomers were the dominant generation in America, this was a sound strategy. However, today, the majority demographic of the country is comprised of Millennials and Gen Zs, and their percentage of the population will continue to grow as time marches on.

Concurrently, Gen X should not be ignored. While smaller than its younger cohorts, Gen X represents the potential “next adjacent” audience for many public radio outlets and should be included in future-focused research initiatives. While smaller in size, Xers are very much a part of the “adjacent opportunity research” discussed in this white paper.

Diversity – As the country’s population makeup shifts younger, it is also becoming more diverse. While 72% of Baby Boomers are white, only half (49%) of Millennials and just four in ten (42%) Gen Zs are as well.

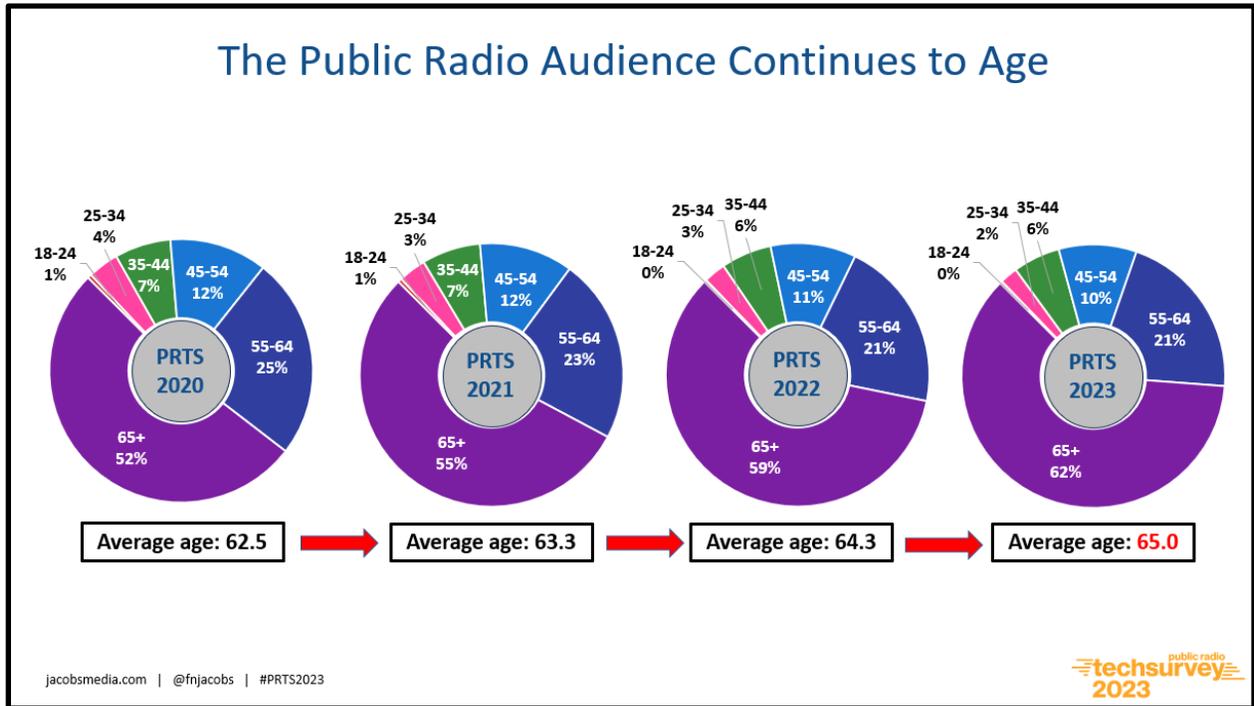
While many public radio stations acknowledge the imperative to diversify – in staffing, leadership, content creation, and audiences targeted – this task has proved to be not a simple one. Stations struggle with the reality of maintaining their appeal to the current aging audience (who comprise the majority of donors) while attracting younger, more diverse audiences.



Also, many stations don’t know where to look or identify potential new audiences or what content appeals to them. That is a key focus of this initiative.

Radio – The broadcast industry needs to accept the fact traditional listening and viewership are not growing, particularly among younger, more diverse groups. This is

particularly true in public radio – we’ve seen the age of listeners increase each year without a significant influx of a younger audience.



Non-radio listeners have numerous options available to them – Spotify, Apple Music, SiriusXM, podcasts, video, social media, and more. Video streaming fans enjoy a wide array of options from which to choose, ranging from YouTube to Netflix to Disney+. Consumers are in control – not only of the content they access, but on their preferred devices and consumption periods. Linear program schedules common to over-the-air stations are not in alignment with new media consumption habits.

As public radio stations attempt to expand their appeal and service to their local communities, developing a deeper understanding of who to target, with what content, in what forms, and on which platforms needs to be researched and investigated. The “Playbook” is clear on this, and it cannot be accomplished in a meaningful way without a strategic road map.

Otherwise, public radio stations are wasting their valuable financial and human resources, while not making meaningful progress to serve their communities. Others will simply remain hamstrung, unable to make intelligent decisions without informed data.

Digital Media – Today, Nielsen’s listening and viewing measurements constitute merely one piece of the puzzle, and are not the sole metric stations can rely on in order to determine impact, reach, and results. To successfully appeal to new audiences, public

radio stations must understand how today's non-listeners and non-viewers access information and music and on which devices and platforms they favor.

Digital media provides a unique opportunity for broadcasters to effectively serve multiple audiences. Over the air, providing the same quality content to the existing audience may be a sound strategy. Broadcast radio and television will remain the core business for years to come. But a focus on traditional media can no longer be considered a growth strategy. Digital media provides the ability for stations to create different content on new distribution outlets targeted at new and diverse audiences – that is still based on the core values of the mother brand.

Journalism – The style and substance of the quality journalism produced by public radio stations have been extraordinarily successful in reaching traditional radio audiences. Public radio's core values resonate today, and the broad and often eclectic story selection fits together to provide a high quality, unique experience.

However, content that is appealing to non-public radio listeners is an unknown. What are the optimal topics and treatments, the desired "voices," the ways in which stories are woven together that resonate and engage? How can today's public radio stations desiring diversity of content reach underserved and next-adjacent audiences while retaining their quality of journalism -- while successfully presenting it in different forms for new audiences?

These challenges are addressed by our new initiative.

Our Solution For Public Radio

The "Playbook" released by SRG, PRPD, and Greater Public cautions "a *purely demographic* focus on age, race, and ethnicity assumes that these segments – 'young' adults, or BIPOC audience – think and act monolithically. If the goal of audience growth for public radio is to engage with members of the general public who are not currently engaged with public radio, but have potential to do so, the strategies to achieve this should focus instead on thinking about the population *psychographically* – in other words, looking for people who share the same values, and interest, and whose values and interests align closely with public media."

The research approach we've adopted and tested during the past year does just that. By stepping away from traditional research methodologies, we take a psychographic view of the overall market landscape. The goal is to identify the "next adjacent audience" opportunities for public radio organizations in their local or regional coverage area(s). These are groups of consumers who share common interests and values with the potential to enjoy and engage with new content and streams created by public media organizations – whether this content ends up on the radio, television, digital platforms, or elsewhere.

The “Playbook” notes “a survey-based national segmentation study of Americans would be able to cluster the U.S. general population into psychographic groups, illuminate which are most promising for public radio’s audience growth and what tactics could be leveraged to reach them and appeal to them.”

We appreciate the idea of a national segmentation study benchmarking these audience types, but we are especially excited to apply this thinking locally. We are well aware that while public radio listeners share many of the same basic values, audience members in Maine, San Diego, Oklahoma City, and Chicago will present key regional differences that must be identified and understood in order to optimize content creation.

As a result of the guidance in the “Playbook,” combined with the work we have already done in this space, we propose the following three-step process:

1. An in-depth survey of a station’s existing donors – the core audience.
2. A parallel survey among a representative sample of the population from the market (or region).
3. Utilizing our proprietary process based upon advanced multivariate analysis, we develop “personas” – profiles that represent groups of people with similar attributes and profiles in each of the above cohorts, threading characteristics common – as well as uncommon – to each.

This process makes it possible for public radio organizations to connect the dots between their traditional offerings and new audiences. Along with the new frontiers of both content and consumer groups, it should be noted our approach is not based on identifying a specific generation or demographic – the research maps out the entire local landscape and allows specific potential audience groups to emerge, regardless of who they are, based not just on age, ethnicity, or other demographic factors, but on key psychographic drivers that better identify who these people are and what motivates them.

Our approach will also inform a better understanding of how music genres fit into lifestyle categories. Music is but one attribute that defines personas, but for public radio, it may provide an important conduit to understanding audience tastes and sensibilities.

As of now, public radio’s music programmers rely heavily on collaboration with their peers to identify and connect with communities of fans. Our research is designed to bring some much-needed science to the art and craft of music programming.

Our surveys are highly detailed, covering a broad range of topics, including current media usage, lifestyle variables, content preferences, existing attitudes and behaviors, and much more in order to provide a robust, well-rounded perspective of values, media habits, interests, and needs. These locally-focused surveys offer clear direction for how local public radio organizations can map out their next adjacent audience strategies.

The result is a comprehensive mapping of groups of people from the local market using personas that enable public radio organizations to accurately identify, pinpoint, and prioritize groups with the highest likelihood of becoming engaged with current – and future – content. This process eliminates much of the guesswork and random targeting, making it a significantly more meaningful, reliable, and impactful process for both satisfying current audiences as well as reaching out to and connecting with new ones.

The process will also identify similar attributes for diverse audiences, providing a road map to determine their needs and how to best appeal to them.

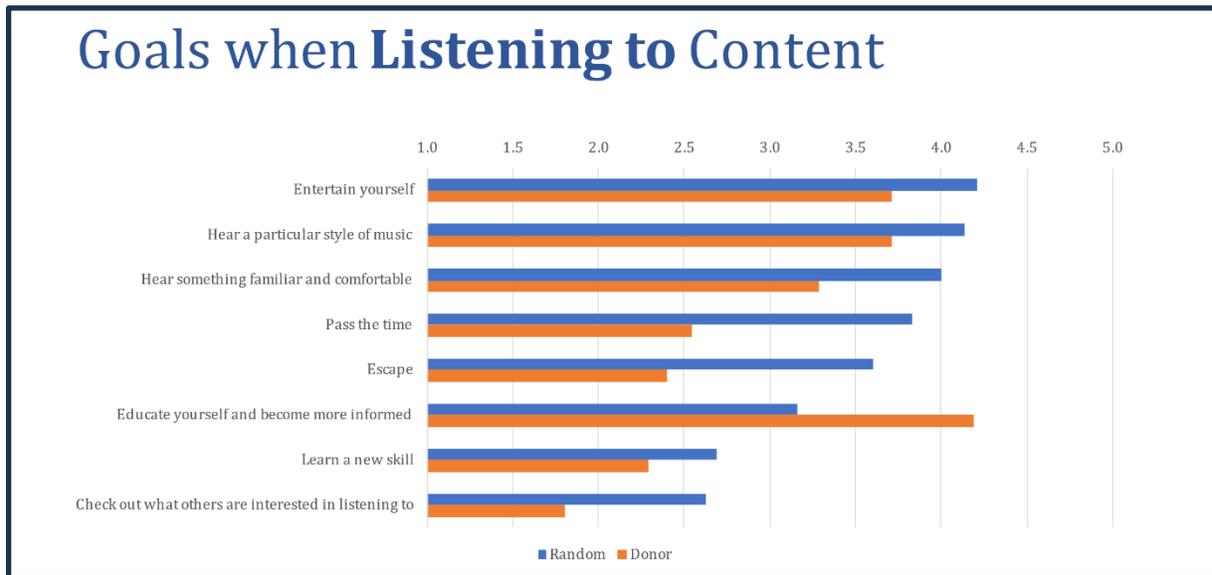
Our Work For Maine Public

In 2022, we implemented a project for Maine Public designed to identify next adjacent audiences from across the state. The project was funded by a grant from the Google News Initiative as part of the GNI Innovation Challenge – <https://newsinitiative.withgoogle.com/innovation-challenges/>. Five primary personas emerged, as seen below (the number and nature of these personas will vary by market and project, so this should be considered one example only):

5 Primary Personas				
				
Newsies	Learners	Experiencers	Entertainers	Sporties
<i>"I Need to Stay In Touch With What's Happening in the World"</i>	<i>"Teach Me Something New"</i>	<i>"What's Hot? What's New? I'm Curious!"</i>	<i>"Give Me What Most People Like"</i>	<i>"What Time's the Game?"</i>

A detailed analysis is provided for each persona, and cross-analyzed with the existing audience as part of identifying those most likely to listen to the station. In the example below, the orange lines represent current donors. The blue line represents the overall market.

While standard demographics are part of each persona, their rich characteristics and traits are key ingredients in stations' understanding of current and aspirational audiences, while crafting content and distribution strategies that match their needs and desires.



The result and impact of the work is best summarized by Rob Holt, digital director of Maine Public:

*One of the key pillars of [Maine Public's current strategic plan](#) is [The Audience of Tomorrow](#). We want to serve the underserved and increase our 18-24 audience size & engagement. I've known Jacobs Media and their work for over 20 years, and they were my first call. Their work with the public radio Techsurvey is invaluable to us. But that study covers our existing audiences, and to meet our strategic goals, we also need to know who is NOT a part of our current audiences. **How can we find these new audiences and meet them where they are?** And once we find them, how can we measure success?*

Working in partnership with Jacobs Media and Mark Ramsey Media, we performed an audience segmentation study -- dividing the new audiences into several (approximately 5) segments using personae to embody the groups we want to reach. We focused on a survey of random people in the entire state of Maine. We also sent out the survey to our current, loyal audiences. In addition to the comprehensive segmentation study, the study included deep comparisons to our current audience. We can now clearly see our entire audience picture -- who is in the audience, and who is not. We're using this data when evaluating new and existing content creation -- deliberately targeting one or more segments. Then we measure the success of

those efforts, and we have the data to help us better reach our new and existing audiences. This is incredibly useful and actionable data.

Since reviewing the findings, Maine Public has begun a rigorous process to implement and track the study's impact and resultant actions taken. We will be sharing this information in future communications.

Our study's goals matches the SRG, PRPD, and Greater Public's call – to close the learning gap by conducting actionable research that addresses public radio's current and future needs for growth and sustainability.

Project Leadership

This research initiative is the product of a partnership between Jacobs Media and Mark Ramsey Media. The two companies have been at the vanguard of forward-leaning audience research for media organizations, as well as the creation and identification of new audiences, formats, and smart digital initiatives.

Jacobs Media has provided research and consulting services for public radio for over two decades, including NPR, APM/BBC, and leading stations including WNYC, KQED, KPCC, Michigan Radio, and many others. Our breakthrough ethnographic research work – “*The Millennial Project*,” produced in conjunction with PRPD and fifteen stakeholder stations – provided the formative insights into this (then) emerging audience and how it compared and contrasted with the current public radio audience.

Mark Ramsey has also been at the nexus of research as well as innovative content creation. He is an acknowledged innovator and research analyst as well as an award-nominated podcaster.

Ramsey has provided strategic research for most of the major commercial broadcasters and does more of this work for non-commercial Christian media companies than any other company in the business. Media clients have included Apple, EA Sports, iHeartMedia, Audacy, and more. Non-commercial clients have included EMF (the owners of K-LOVE), Hope Media Group, and many more. Ramsey has a long history of work in the public radio space, including projects for shows like *Marketplace* and others. He has been a popular public speaker at PRPD and PMDMC.

His podcast projects included the award-nominated INSIDE series for Wondery, the full-cast dramatic series AFTERSHOCK (featuring David Harbour) for iHeartMedia, *Dark Sanctum* for Wondery+, and FADE IN: QUENTIN TARANTINO & PULP FICTION for Los Angeles Public radio legend KCRW.

Ramsey and Jacobs Media are teaming up to provide stations not only with research insights, but also with their expertise at analysis and implementation of the research. These projects will do more than deliver a report – both Jacobs and Ramsey's work will

address content creation. With each project, a 90-day post-research consultation period will be provided, designed to help public radio organizations interpret and implement the key findings from the research.

Public radio stations cannot wait for the next generation of listeners to find them. The boldest and most aspirational DEI goals become precarious without strong data at the foundation. This local research approach, and the vision of Jacobs Media and Mark Ramsey Media, will provide the roadmap for public radio stations to move ahead with confidence and success.

We look forward to speaking with you about this approach and how it can be implemented at your station.