

# Making the Case for Public Radio Music:

## How to Advocate for Your Station



# noncomMUSIC Alliance

- Launched in 2018
- Started with **70+** stations – now **150+** members
- *Why form the Alliance? What role can it play in Washington?*
- Filling the void →
  - directly representing and communicating the public service role of noncommercial public radio music stations in communities across the U.S.



# CPB Funding Requests

## Fiscal Year (FY) 2024 Public Radio Funding Requests:

- \$575 million for CPB in FY2026 (Two-Year Advance Funding)
- \$60 million for Interconnection
- \$56 million for Public Safety Infrastructure (NGWS)

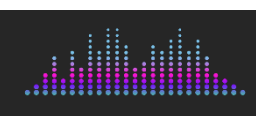
## Status of requests:

- House proposed eliminating two-year advance funding and interconnection
- Senate approved level funding
- House and Senate supported NGWS funding at different levels



# Why CPB Funding Matters for Music

- Payment of music licensing fees across the public media system
- Community Service Grants (CSGs)
- The interconnection system – the nationwide distribution system (PRSS) that supports distribution of content and emergency alerting
- The Next Generation Warning System grants program



# You have an amazing story. Tell it!

- Introduce the basic facts of your station
  - Staff, format, impact, funding model, how you plan to celebrate Public Radio Music Day
- Think Local: Highlight your story, artists, and community service
- Explain that your mission depends upon public support
- Make a direct ask
  - Ask the Member to support CPB funding, in order to support public radio music
  - If in the House, ask the Member to cosponsor H. Res. 689, the Public Radio Music Day resolution
  - Considering inviting the Member to visit your station
- ***If you are limited in making a direct ask, explain the impact of what a loss of funding would mean for your station***



# How Your Hill Meeting Will Go

- Arrive 5 min early to the front office
- Expect your meeting to last about 20 minutes
- Introduce yourself and your station – 5 min
- Close your introduction by making the ask – support CPB Funding and co-sponsor resolution (if a House meeting)
  - “I’m here today to ask you to support...”
- Ask the Member or staffer for questions or feedback
- Watch the clock and follow the staffer’s lead
- Leave the fact sheets with the staffer
- Get a business card so that you can write a thank you note



# Keep the Engagement Going

- Build congressional outreach into your programming or events schedule for year-round outreach
  - Once a quarter cadence
- Invite local leaders and legislators to events
- Identify the right station staff to lead this work
- Engage community partners and third-party validators



# Questions?





**PUBLIC  
MEDIA  
CO.**

# **Mapping the Reach of Public Media Music**

October 16, 2023

# TODAY'S SESSION

Review maps developed and consider these three questions:

1. Are the assumptions around what counts as a music station and format qualifications the right ones?
2. Who else should be included and where can we most efficiently get that info?
3. To what end? Why is this worthwhile?

Then determine **NEXT STEPS**

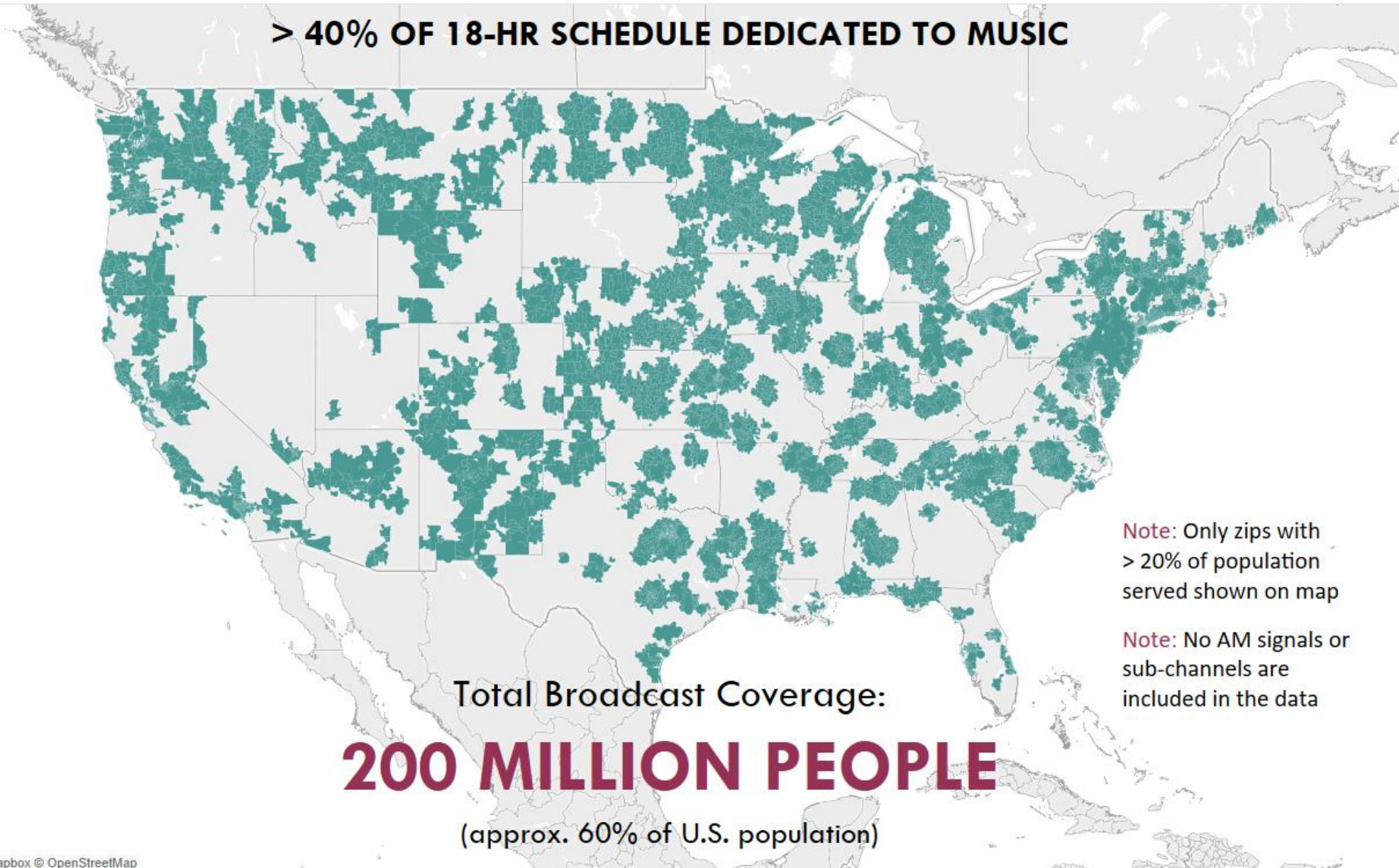
# CREATING THE MAPS

Developing the maps and population coverage numbers required some assumptions and omissions:

- 1. Music station = at least 40% of 18-hour schedule dedicated to music**  
(For AAA, classical, and jazz maps, at least 33% of 18-hour schedule had to be dedicated to that specific format)
- 2. Schedule/format info based on NPR data and so only NPR members are included in maps** (with a few exceptions)
- 3. Only CPB-qualified stations included**
- 4. No sub-channels and no AM signals included**
- 5. Population based on broadcast signal coverage. Only zips with > 20% of population served are shown on maps**

# PUBLIC RADIO MUSIC STATIONS FM COVERAGE MAP

> 40% OF 18-HR SCHEDULE DEDICATED TO MUSIC



**Note:** Only zips with  
> 20% of population  
served shown on map

**Note:** No AM signals or  
sub-channels are  
included in the data

Total Broadcast Coverage:

**200 MILLION PEOPLE**

(approx. 60% of U.S. population)



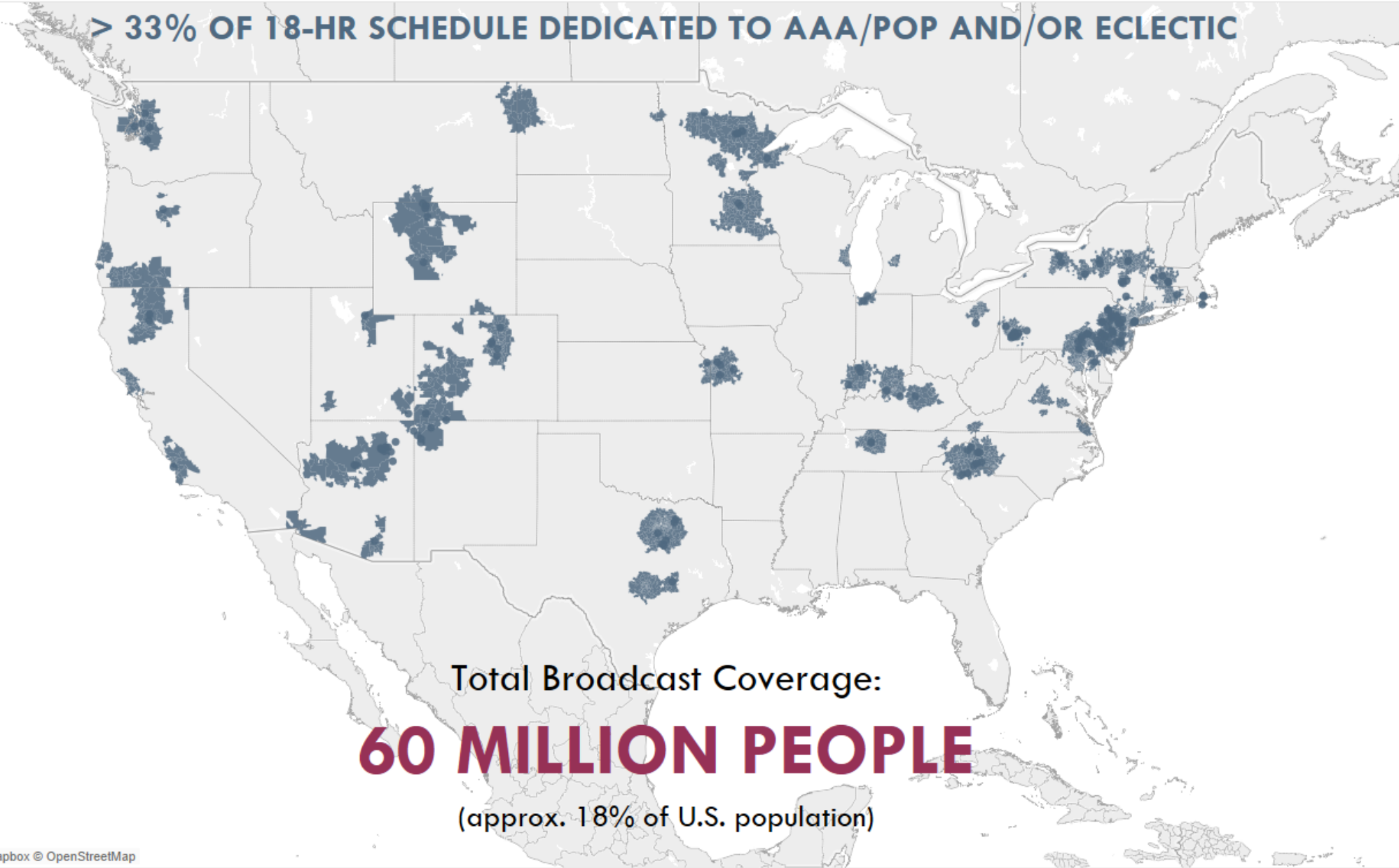
# CLASSICAL STATIONS FM COVERAGE MAP

> 33% OF 18-HR SCHEDULE DEDICATED TO CLASSICAL

Total Broadcast Coverage:  
**141 MILLION PEOPLE**  
(approx. 42% of U.S. population)

# AAA & ECLECTIC STATIONS FM COVERAGE MAP

> 33% OF 18-HR SCHEDULE DEDICATED TO AAA/POP AND/OR ECLECTIC

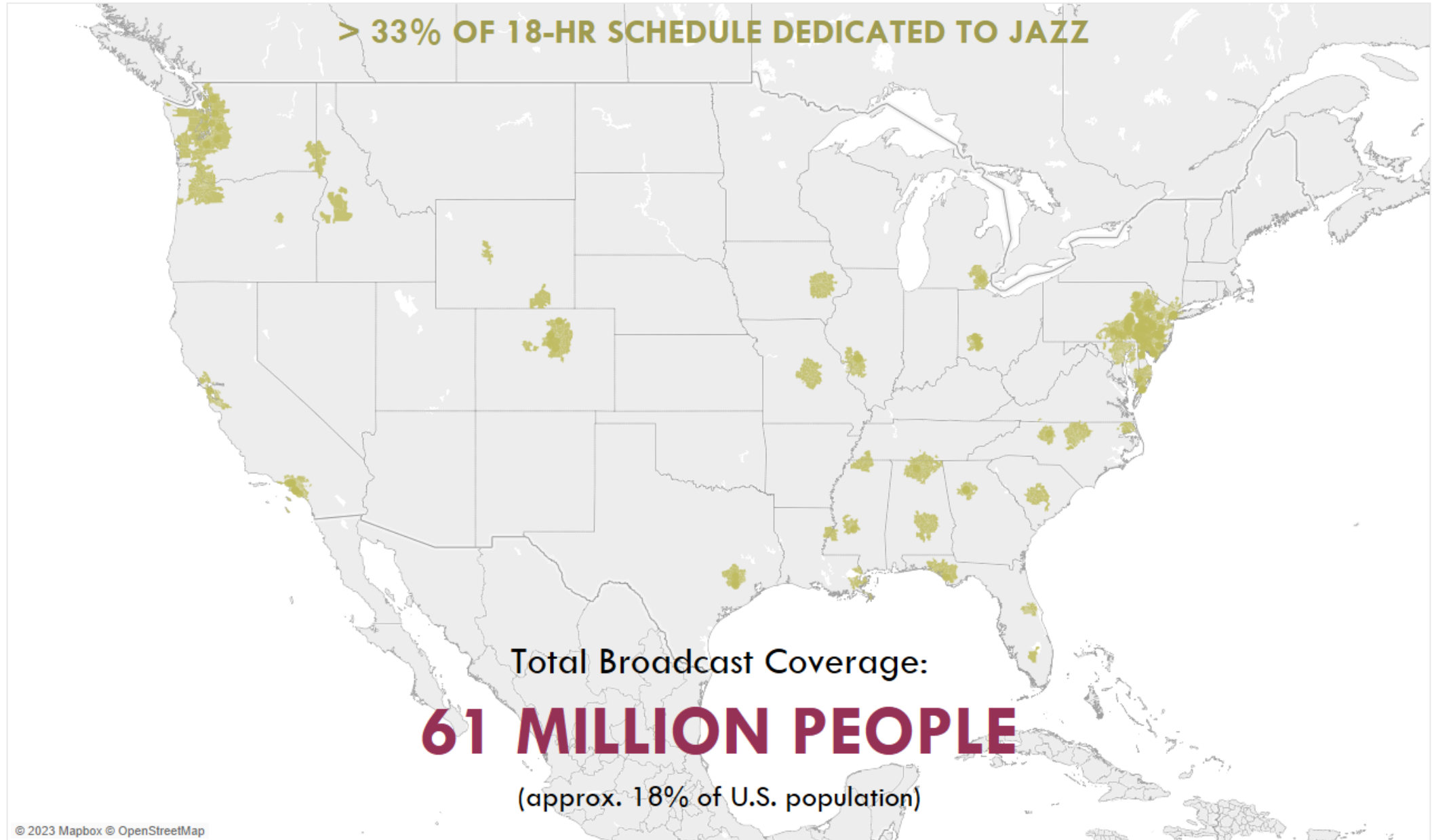


Total Broadcast Coverage:

**60 MILLION PEOPLE**

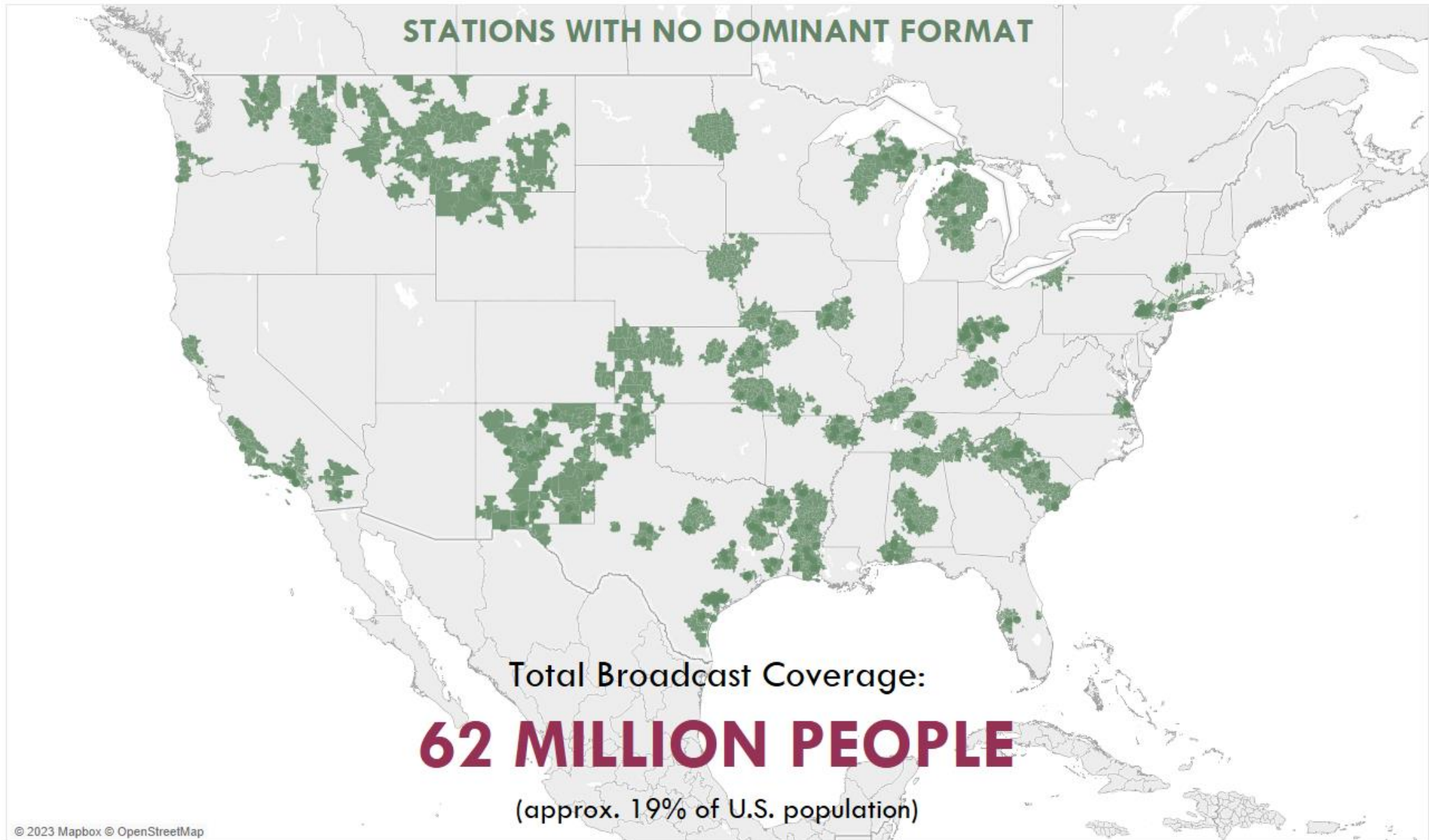
(approx. 18% of U.S. population)

# JAZZ STATIONS FM COVERAGE MAP



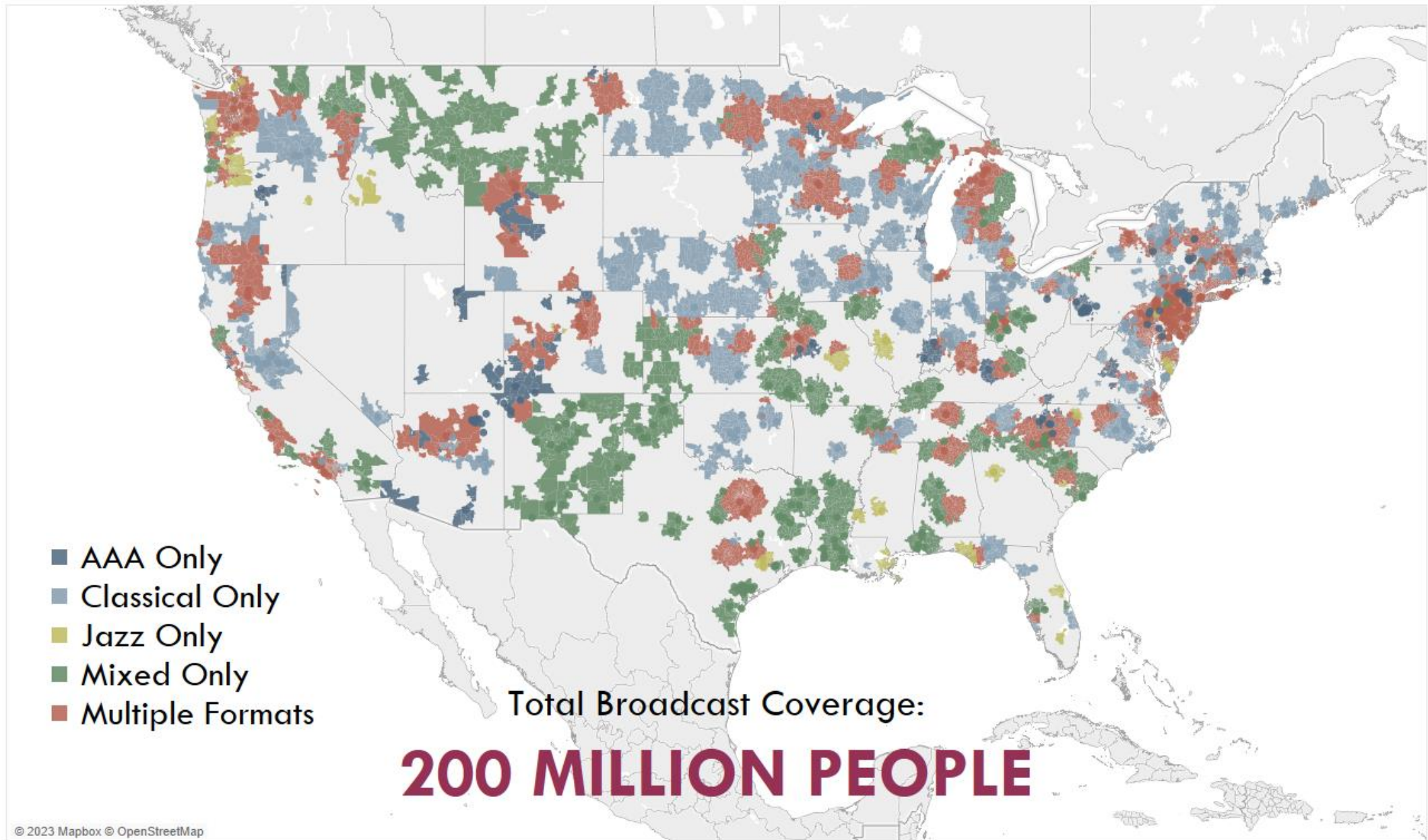


# MIXED FORMAT STATIONS FM COVERAGE MAP

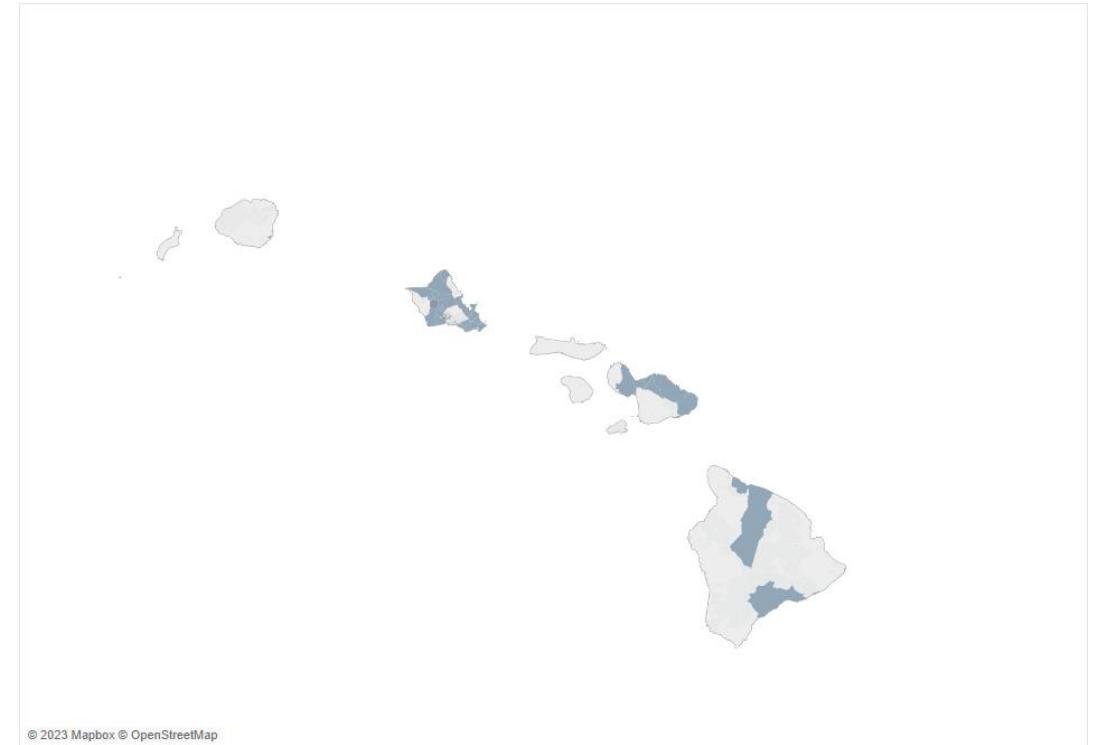
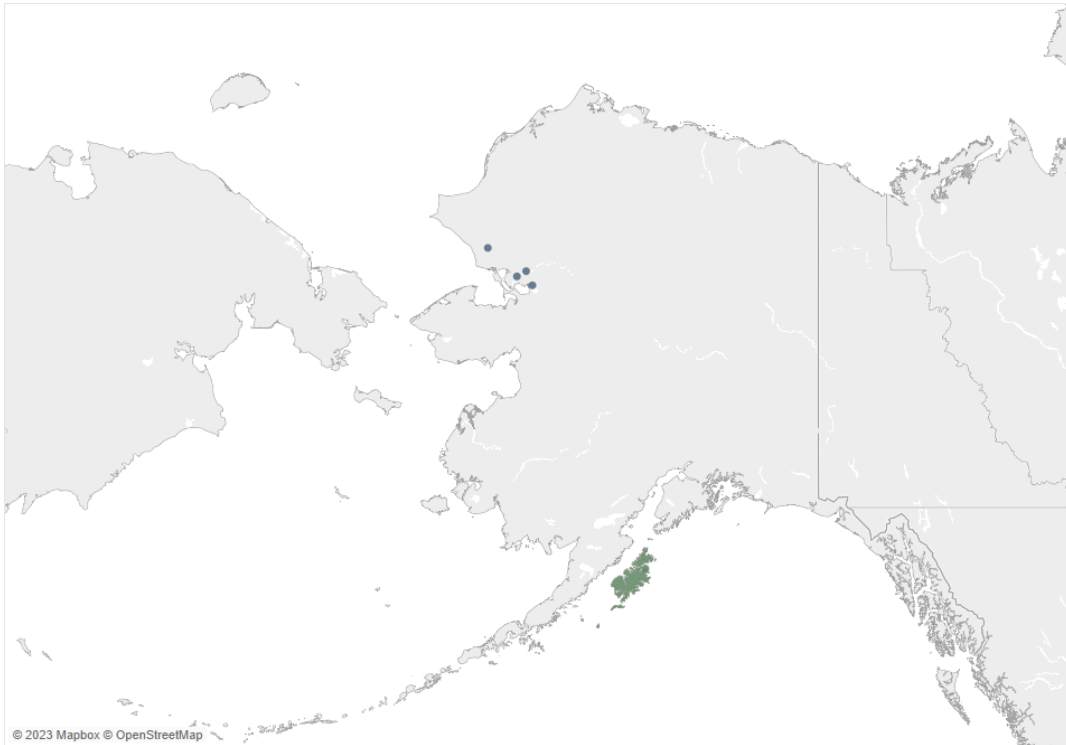




# PUBLIC RADIO MUSIC STATIONS FM COVERAGE MAP



# PUBLIC RADIO MUSIC STATIONS FM COVERAGE MAP



# POTENTIAL NEXT STEPS

If valuable, the maps could be expanded/improved. Potential updates include:

- 1. Including non-NPR member stations** (there are many CPB-qualified stations that aren't primarily news and part of NPR)
- 2. Editing the data based on specific insights** (e.g., editing format info based on input from station leader)



# **PUBLIC RADIO META-ANALYSIS**

Abby Goldstein – President, PRPD

Joyce MacDonald – CEO, Greater Public





# ABOUT THE STUDY

SRG, Greater Public and PRPD worked together to compile more than two dozen local studies from across the country. City Square Associates performed a meta-analysis

Music specific studies include:

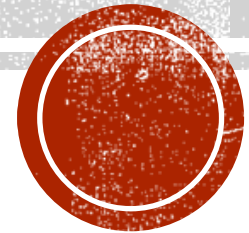
Slover Linett Audience Research, 2023 "Taking Another Listen", commissioned by KING Seattle, WRTI Philadelphia, WQXR New York and KUCC Oklahoma City

Nashville Public Radio Market + Lifegroup + Member Study

KUTX Austin Triple A Lifegroup + Member Study

KXT Dallas Market + Lifegroup + Member Study

Indie 102.3 Denver Market + Lifegroup + Member Study



# KEY FINDINGS FOR MUSIC STATIONS

- Local connection is a key differentiator in a crowded music marketplace
- Strong cross-platform strategies are needed to serve new audiences.
- Distributing locally focused content through digital platforms can lead to opportunity for increased engagement.



# KEY FINDINGS FOR MUSIC STATIONS

- Transactional approach is not working for younger listeners – different giving options are needed
- Audiences have many choices for music, so what is the value proposition for someone to support you?
- Philanthropically-motivated givers in current audiences have not been effectively reached





- Understanding potential audiences who aren't already engaged with you.
- Digital audience needs and preferences for music-based content
- What are the unmet needs of the music consumer? The local music ecosystem?
- New methods of support for new audiences

# RESEARCH GAPS





# WHAT CAN YOU DO TODAY?

- Consider doing your own local research to learn about potential audiences you aren't reaching.
- Prioritize mid-level and major-giving to tap your current, loyal, passionate audience for support



# WHAT CAN YOU DO TODAY?

- Get out and start building bridges and partnerships in the community. Find out where your organization fits into the local music and arts ecosystem.
- Think BIG and take some risks – playing it safe is no longer an option. How about a live broadcast from somewhere unexpected?

# THANK YOU

Abby Goldstein – [agoldstein@prpd.org](mailto:agoldstein@prpd.org)

Joyce MacDonald – [jmacdonald@greaterpublic.org](mailto:jmacdonald@greaterpublic.org)



# Public radio music audience trends & context

Lori Kaplan, October 2023





Media context



National broadcast trends by music genre



Demographics by station format



Digital music consumption

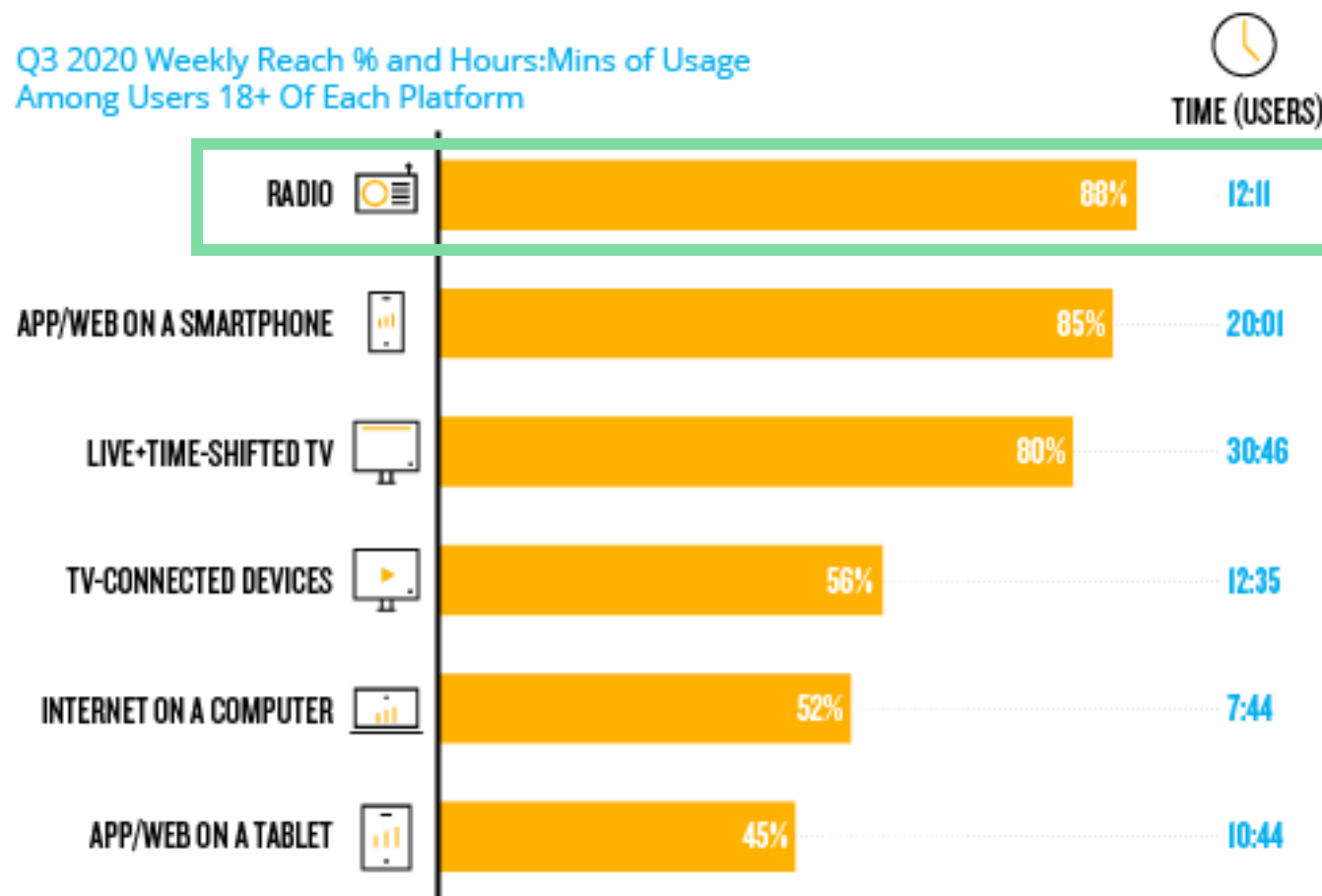




*Noncommercial music  
stations outperform  
broadcast competition - -  
while digital platforms  
change how consumers  
listen to music*

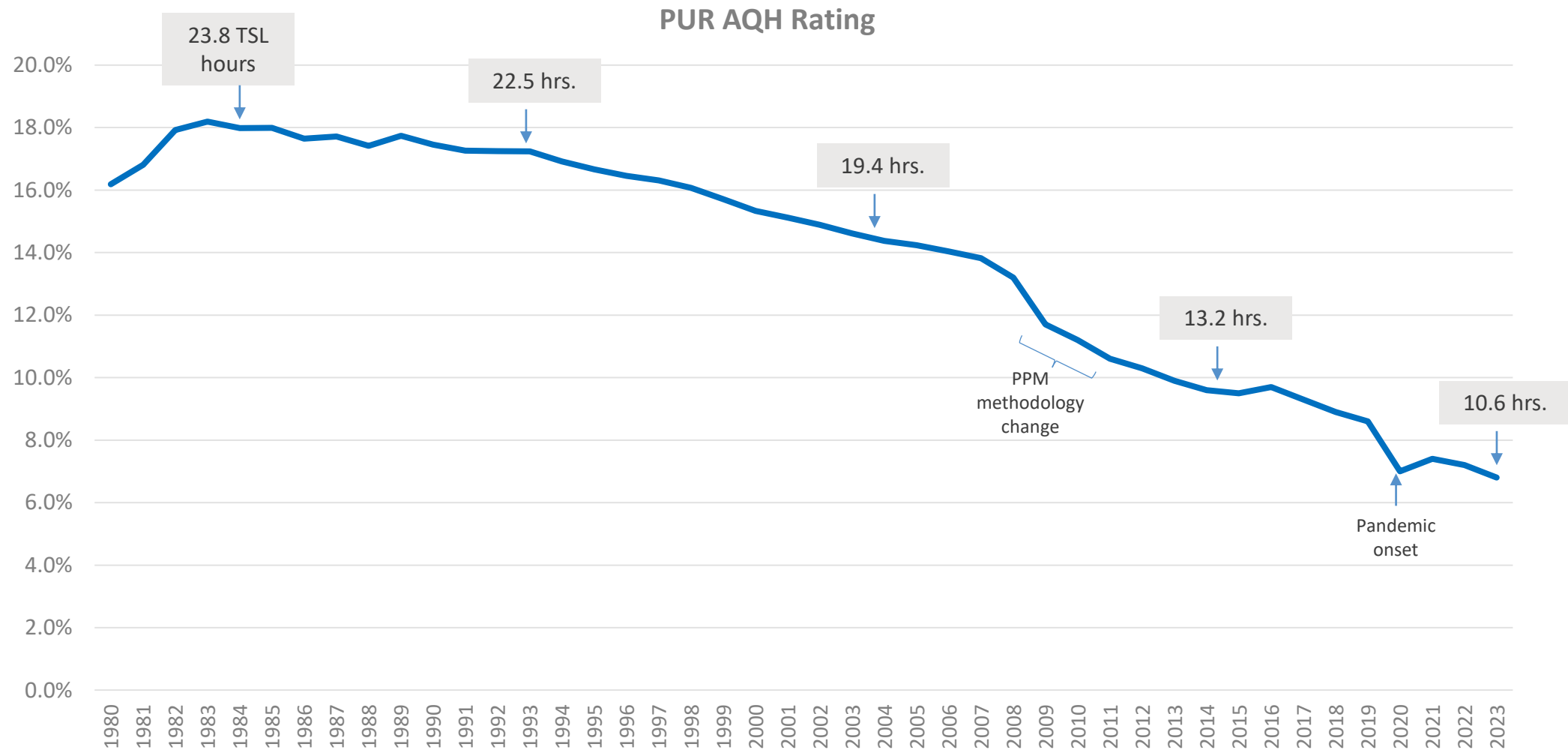
# Media context

# Radio continues to dominate weekly reach across media





# But . . . time spent listening to radio has declined since the early 80s apex



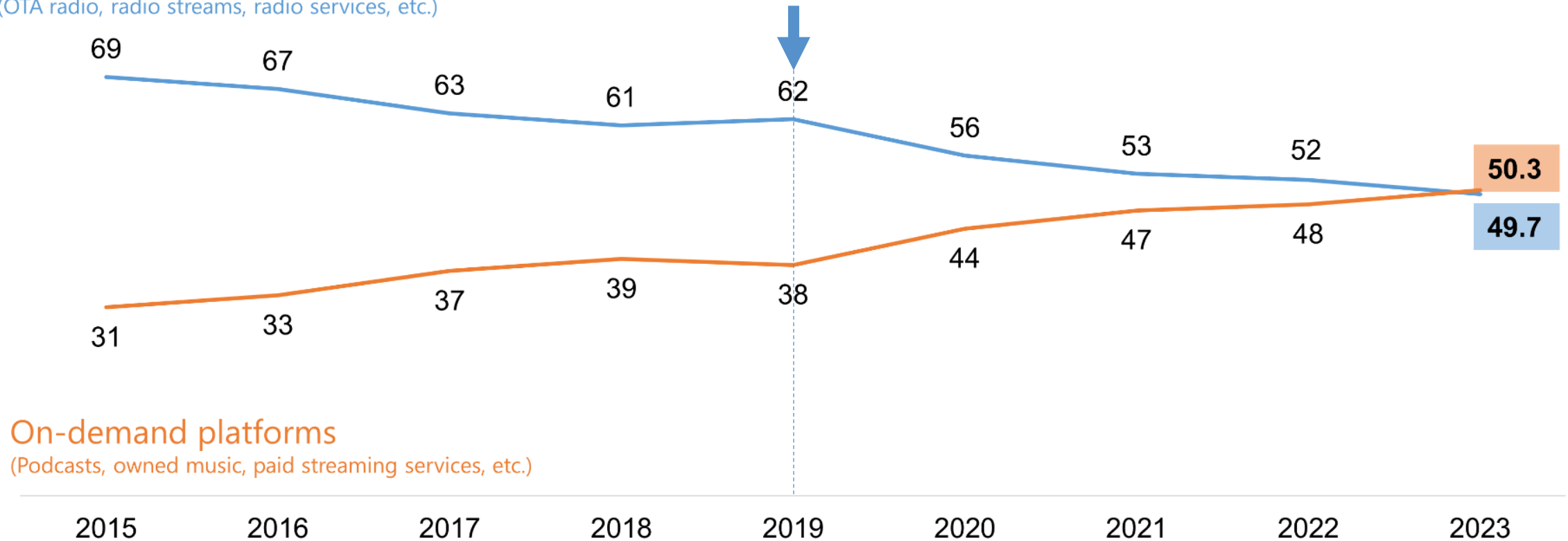
# And Americans are now spending more time with on-demand audio platforms than linear

## Share of all audio listening

### Linear platforms

(OTA radio, radio streams, radio services, etc.)

Inflection point for  
NPR content

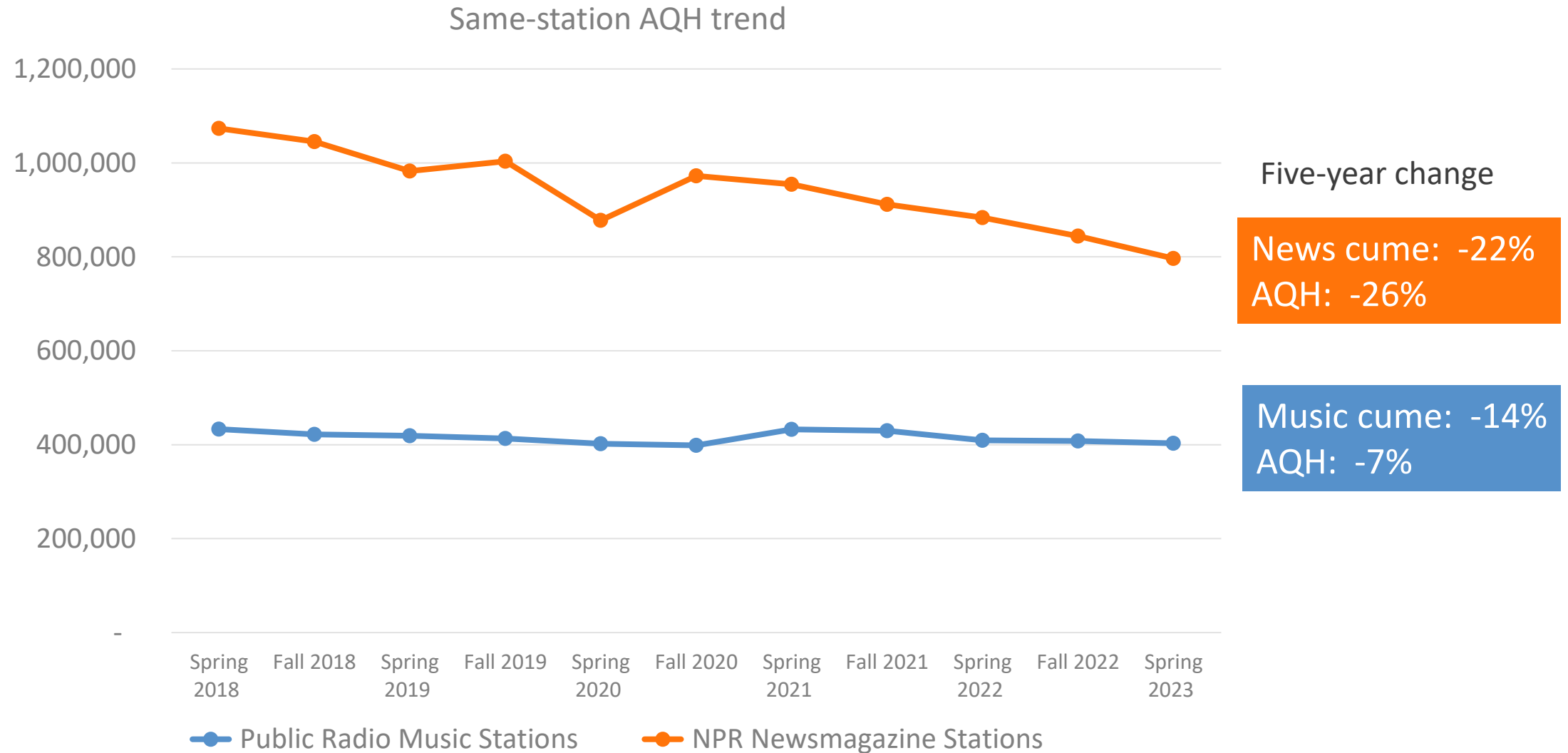


### On-demand platforms

(Podcasts, owned music, paid streaming services, etc.)

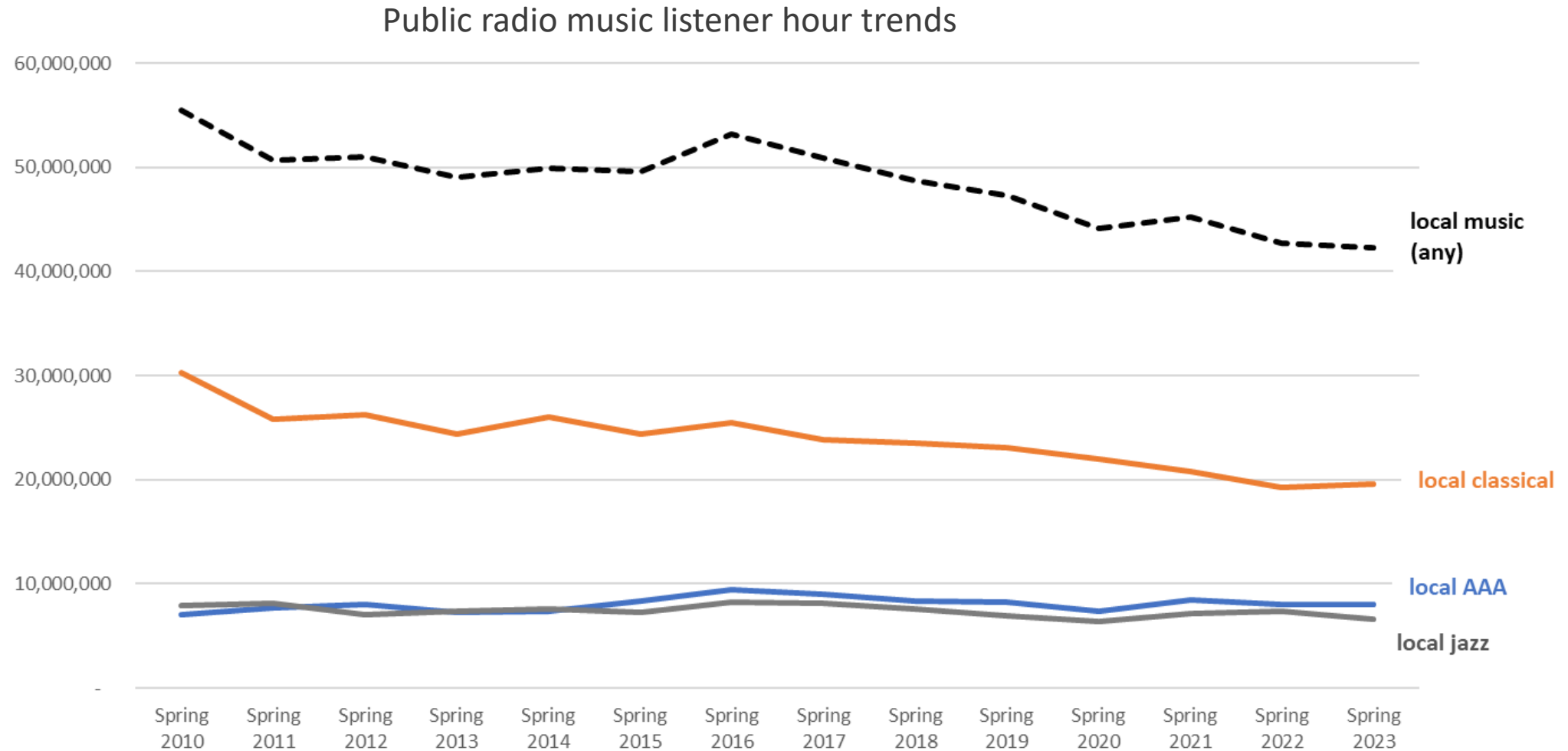
# Broadcast audience trends by genre

# Public radio music-format stations demonstrate more resilience than newsmagazine stations



Source: ©The Nielsen Company. Nielsen Audio Nationwide via Act 1 Systems, Spring, Women 12+ /Persons 12+, based on cume

# Most public radio music format types on (any station format) have lost listener hours



# AAA music gained listener hours over the past decade

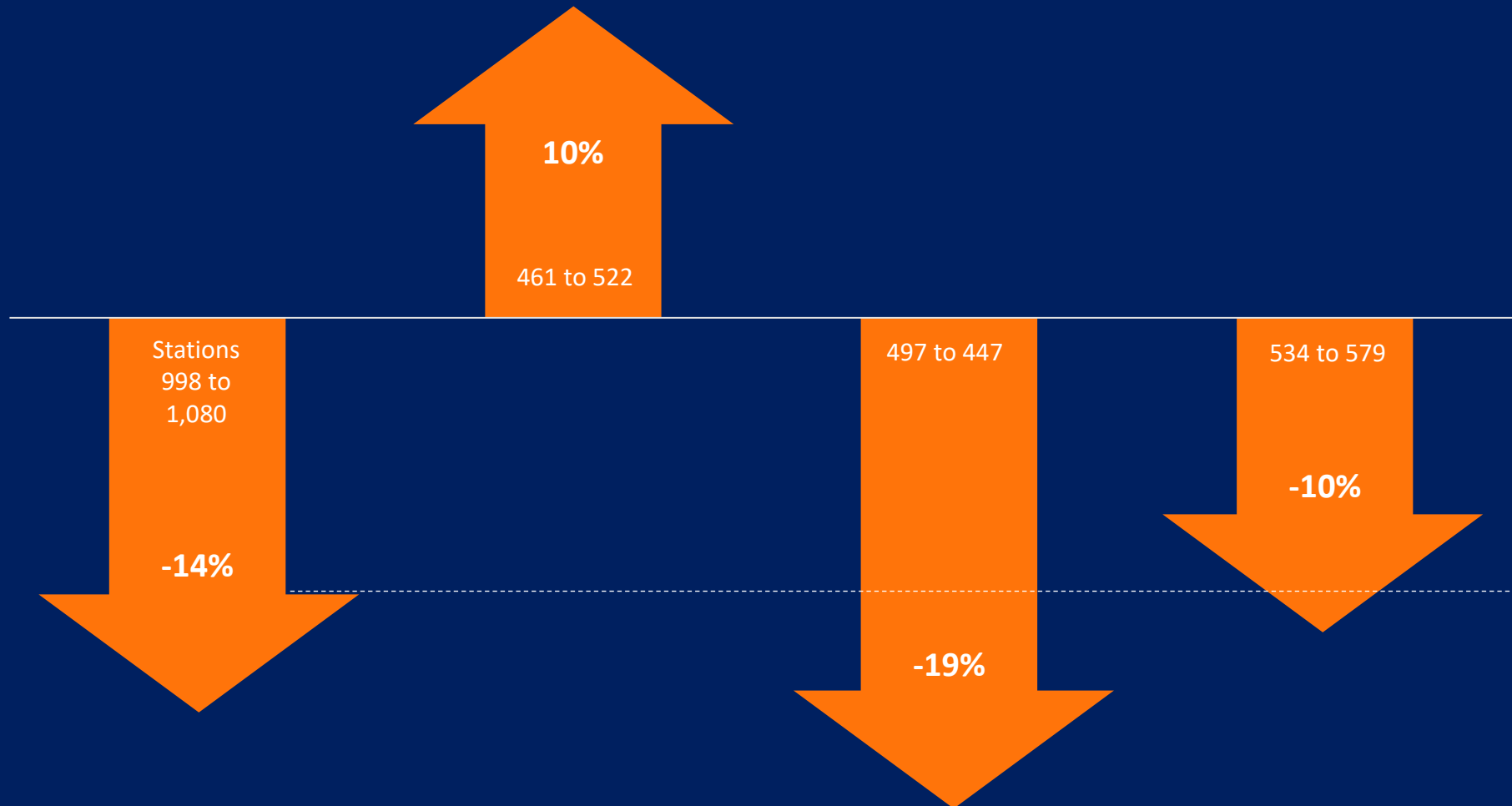
Public radio:

Any music

AAA

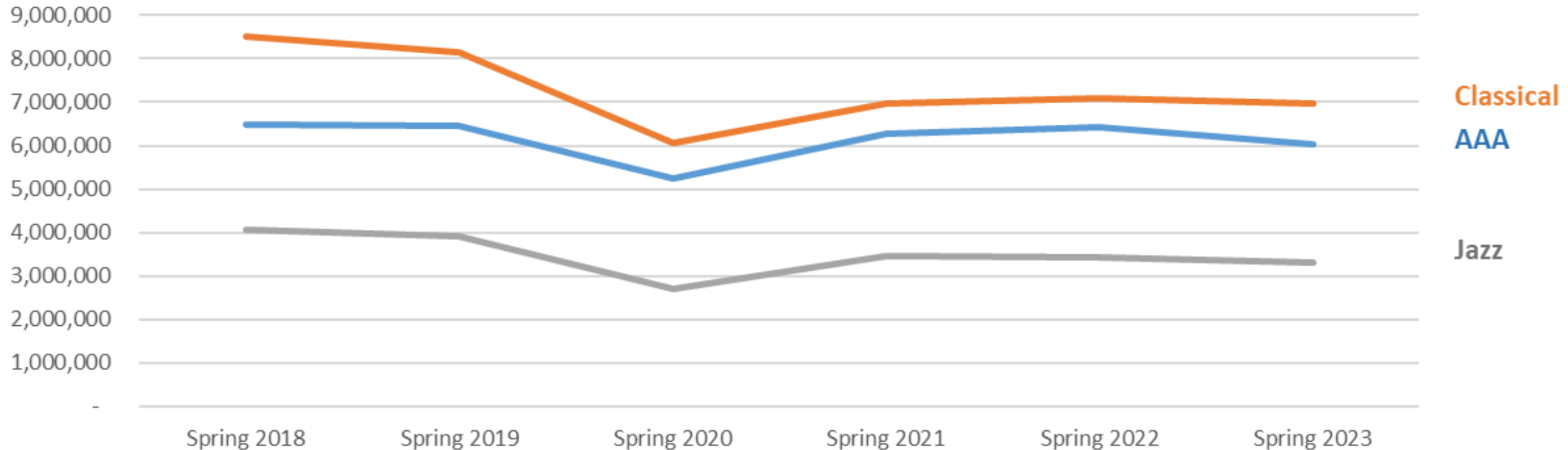
Classical

Jazz



# Among CPB + NPR Member stations, music-format station cumes have declined over the past five years

Station 18-hour format weekly cume trends



# Five-year cume loss across music-formatted stations is more pronounced among classical and jazz stations

Public radio:

AAA

Classical

Jazz

Stations  
283 to 308

267 to 259

67 to 69

-7%

-18%

-19%

PUMM -6%

**Commercial  
Stations**

-23%

120 to 114

-50%

16 to 12

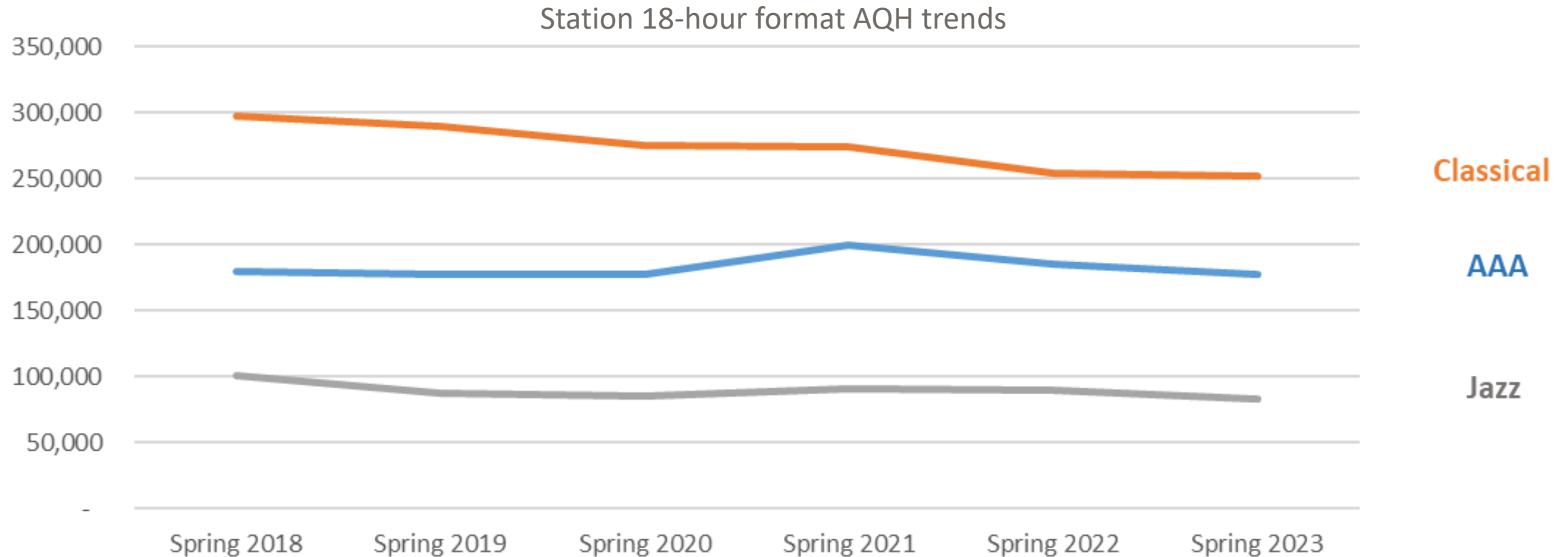
-84%

24 to 19

Source: Audigraphics based on Nielsen/Arbitron Nationwide, persons 12+



# Music format station AQH trends show AAA holding nearly steady while classical and jazz stations see declines akin to cume



# 5-year year AAA AQH most resilient

Public radio:

AAA

Classical

Jazz

-1%  
Stations  
283 to 308

267 to 259

67 to 69

-15%

-17%

PUMM -21%

*Commercial  
Stations*

-14%  
120 to 114

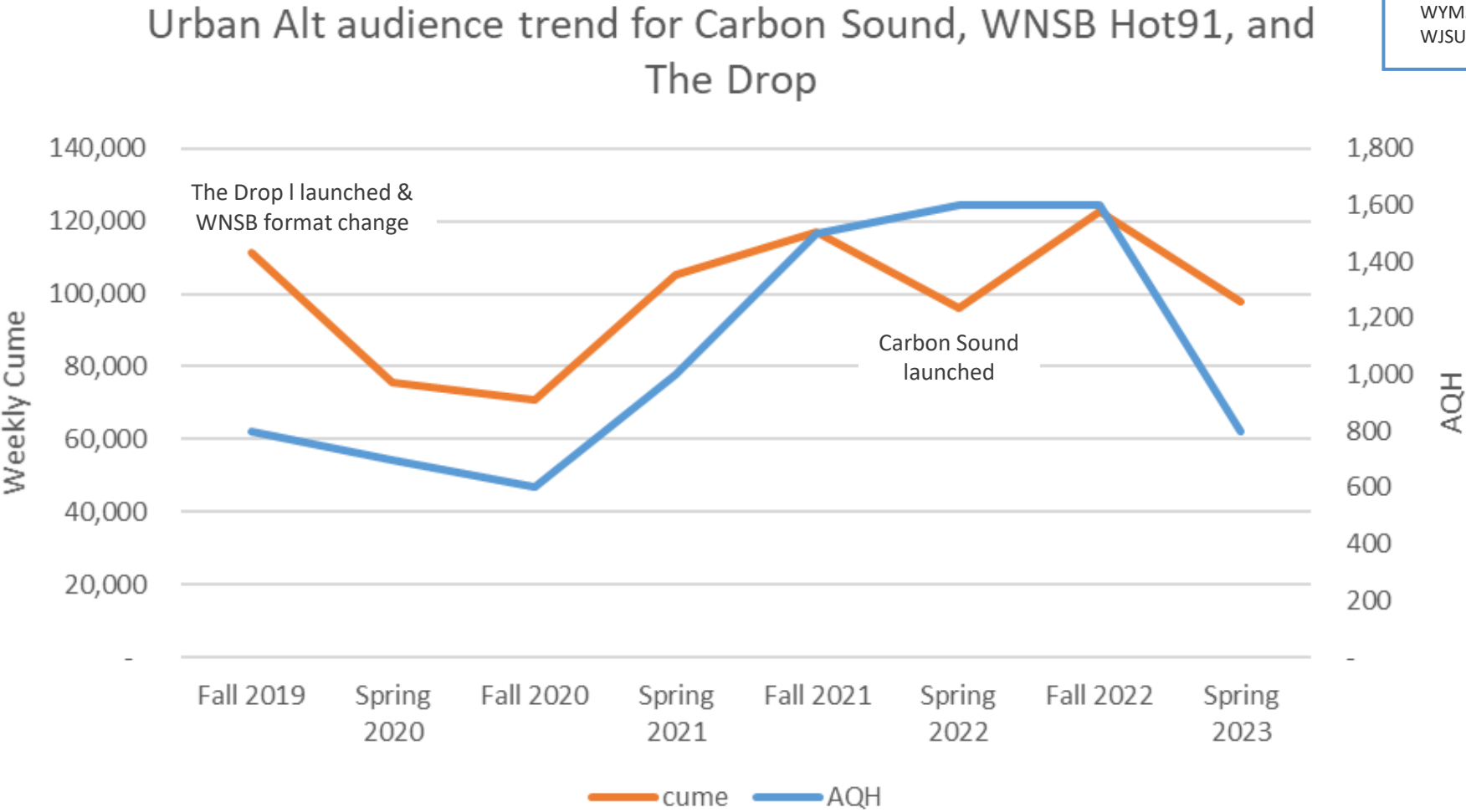
-54%  
16 to 12

-72%  
24 to 19

Source: Audigraphics based on Nielsen/Arbitron Nationwide,  
persons 12+

# Urban Alt: a limited peek

# Urban Alt: limited data, HD channels tend to attract smaller audiences



No data for these stations in Nielsen  
KTSU-FM HD2 ([The Vibe](#))  
WYMS-FM HD2 WYMS-FM Radio Milwaukee ([HYFIN](#))  
WJSU-FM HD2 ([The SIPP FM](#))

Pub radio cume: -12%

Commercial Urban Adult Contemporary: -19%

Pub radio AQH: 0%

Commercial Urban Adult Contemporary: -25%

# Demographics

# Gender: music categories trend toward listener gender parity



% women

AAA

46%

Classical

49%

Jazz

48%

Urban Alt

56%



# Education: slight increases in education over past 5 years



% College  
educated

AAA

**52%**

Up from 48%  
in 2018

Classical

**63%**

Up from 57%

Jazz

**47%**

Up from 45%

Urban Alt

**19%**

# Income: increased over the past five years



% Income  
\$75K+

AAA

55%

Up from 47%  
in 2018

Classical

56%

Up from 48%

Jazz

50%

Up from 43%

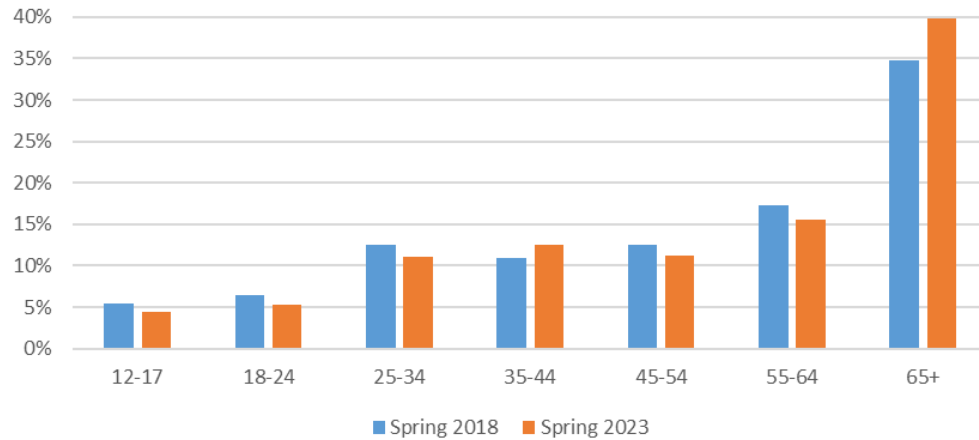
Urban Alt

38%

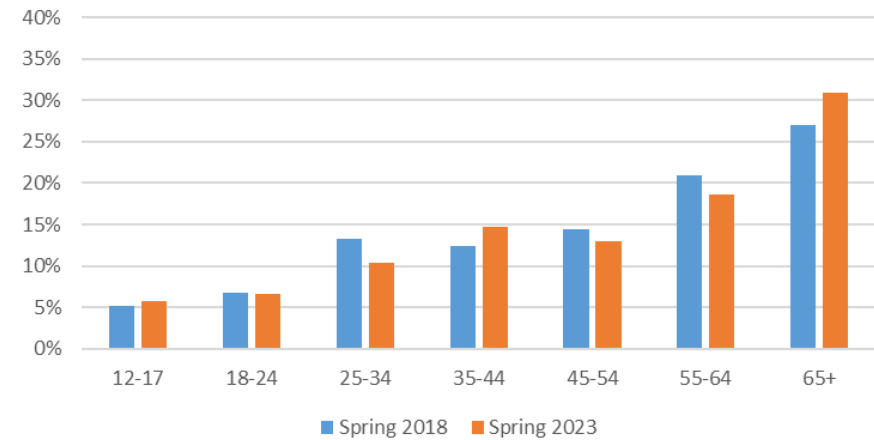


# Age: weekly audience across legacy music categories is increasing among 65+

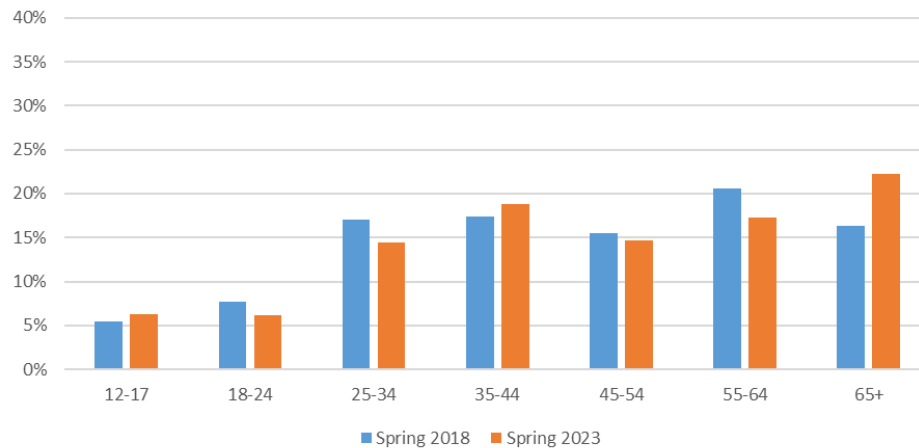
Classical age categories

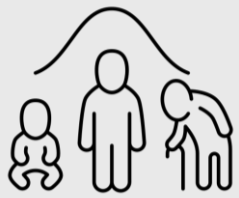


Jazz age categories



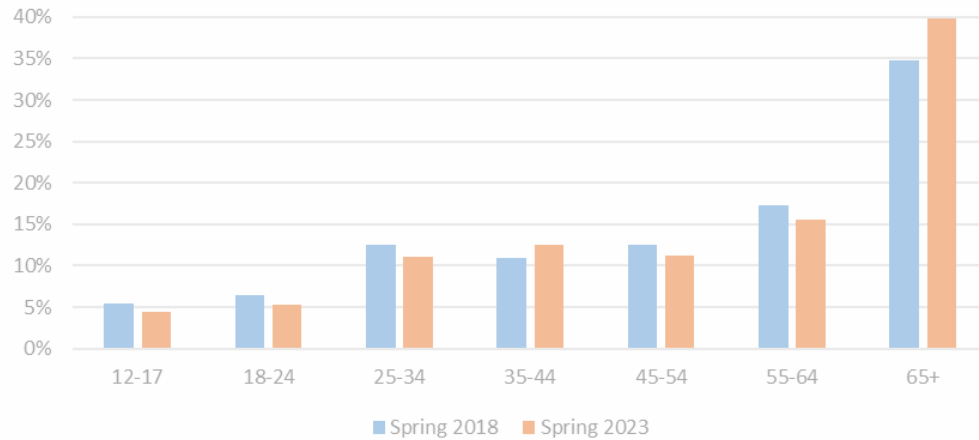
AAA age categories



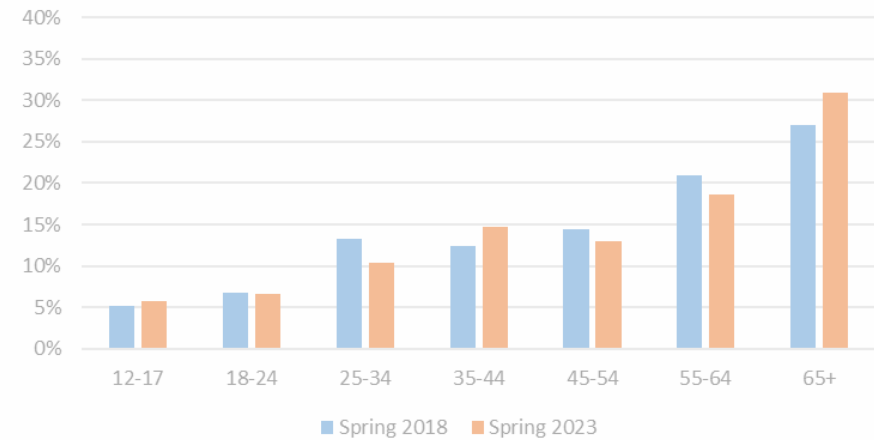


# Unique generational audience curve among Urban Alt

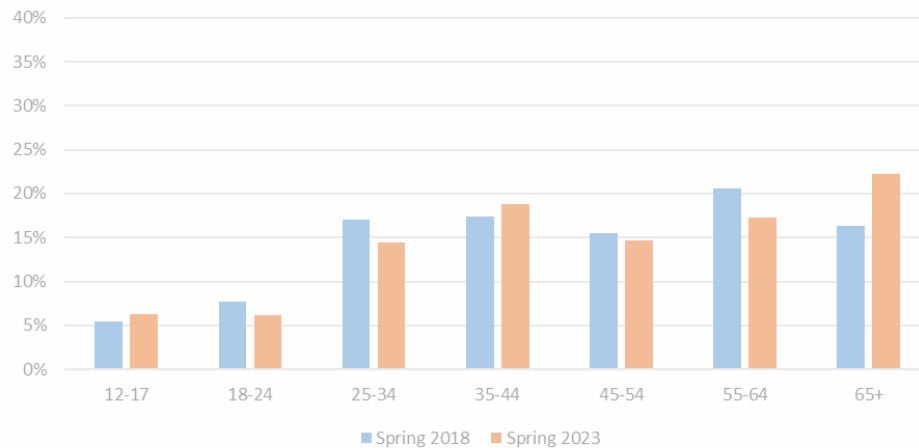
Classical age categories



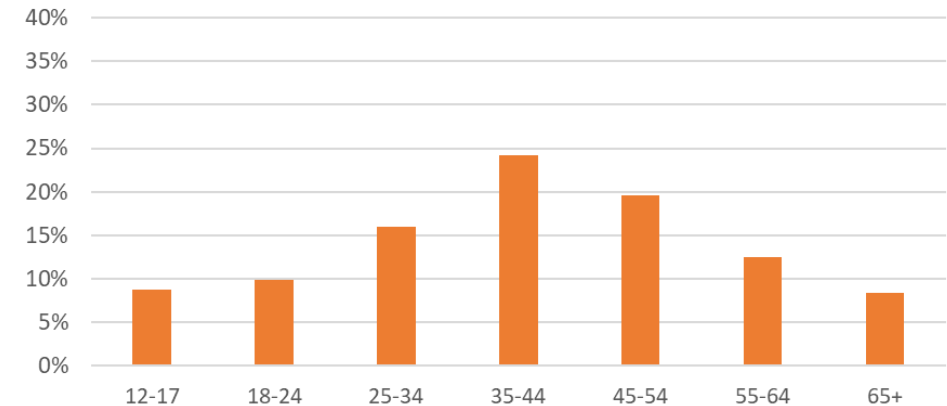
Jazz age categories



AAA age categories



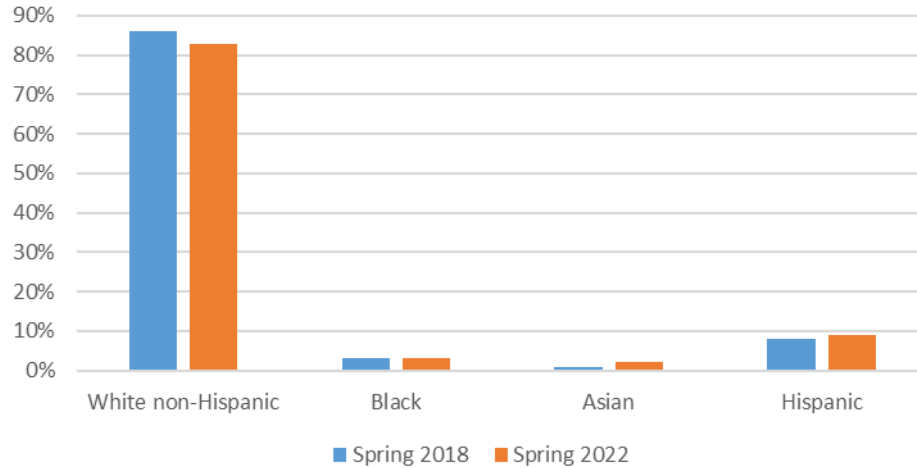
Urban Alt age categories



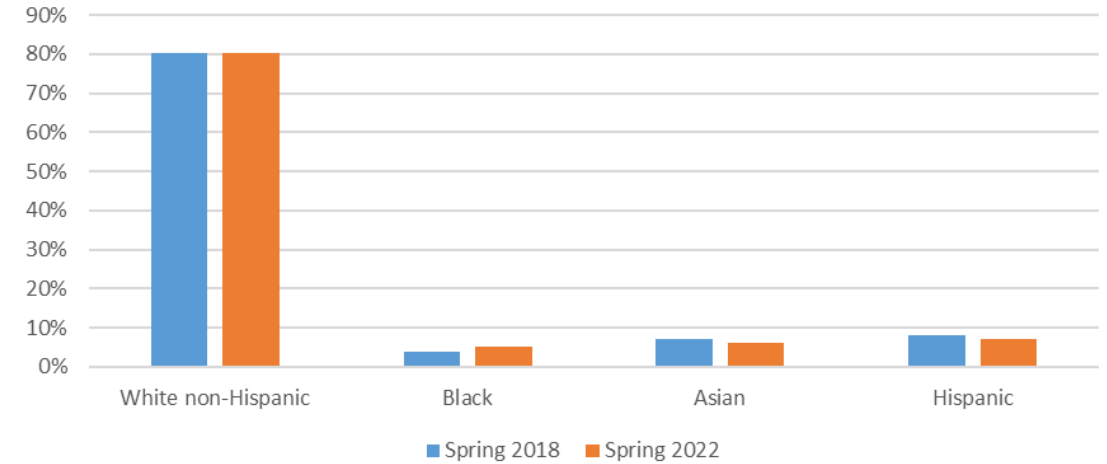


# Race & ethnicity: little movement over time. Jazz overwhelmingly more diverse than AAA and classical

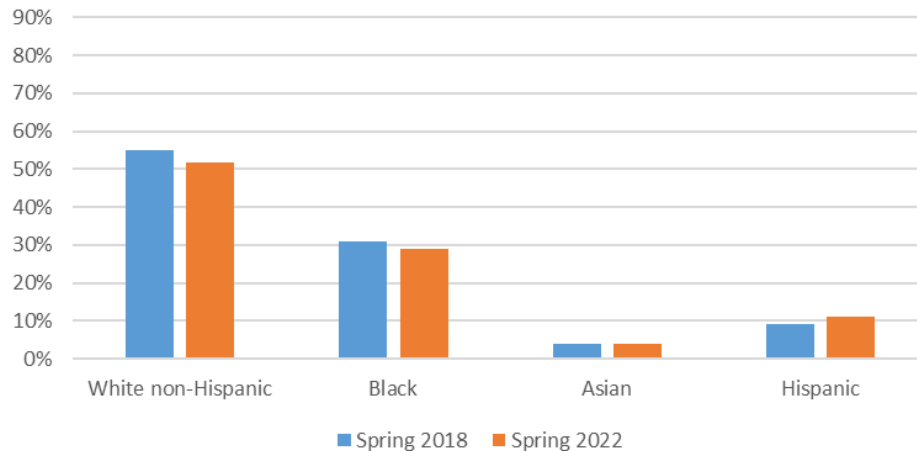
AAA audience race and ethnicity composition



Classical audience race and ethnicity composition



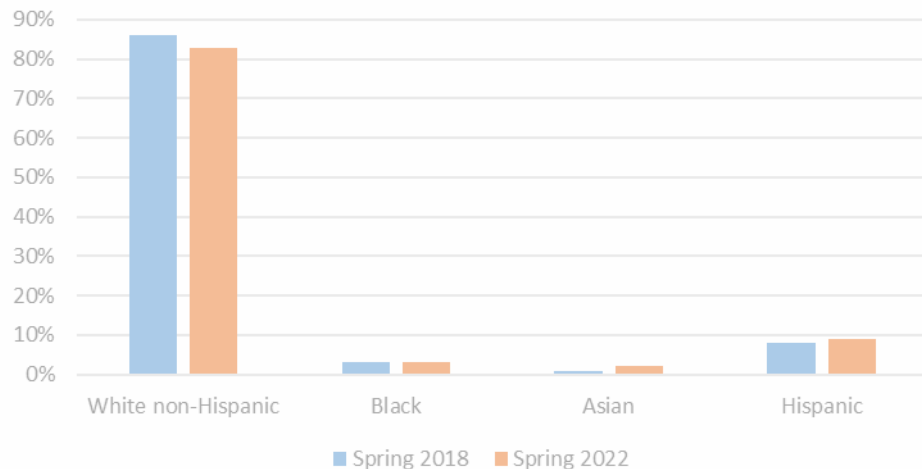
Jazz audience race and ethnicity composition



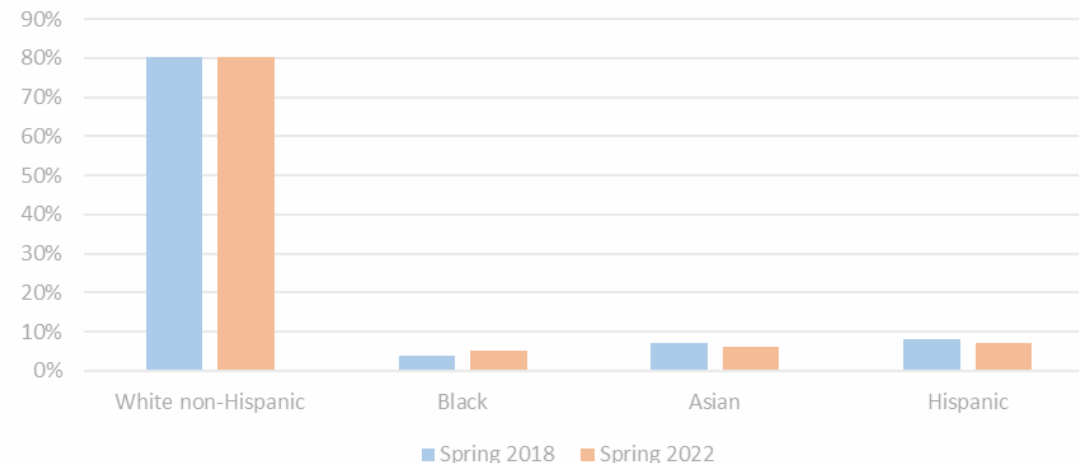


# Urban Alt super serves Black communities

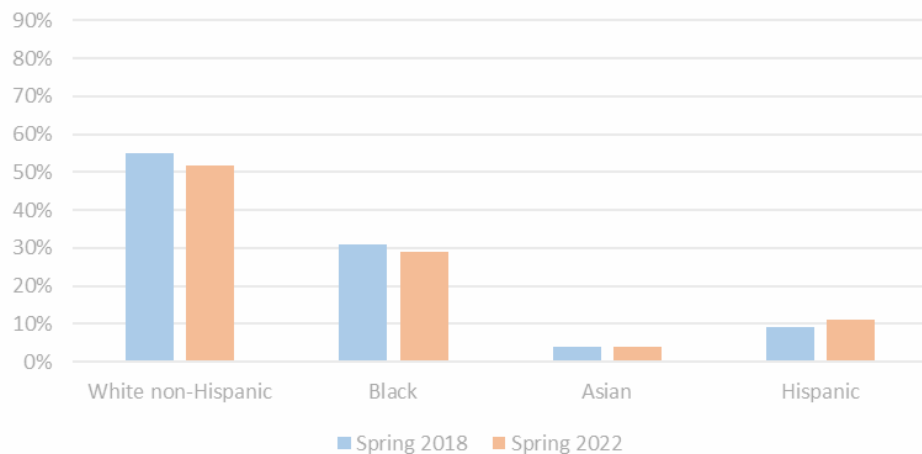
AAA audience race and ethnicity composition



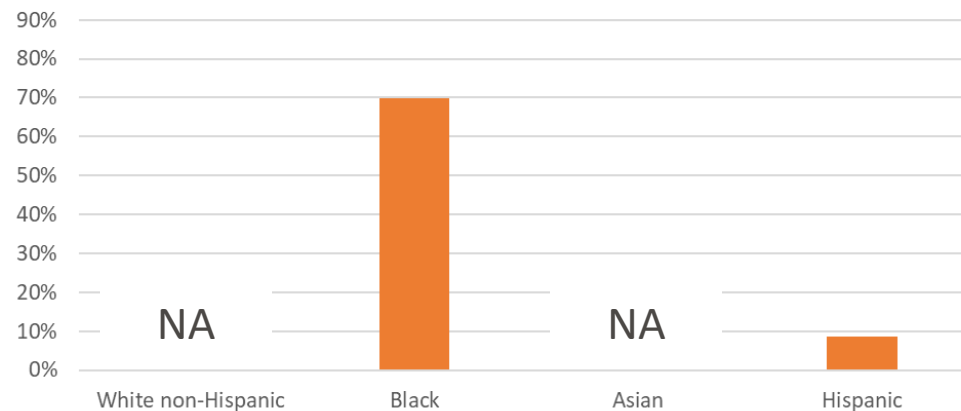
Classical audience race and ethnicity composition



Jazz audience race and ethnicity composition



Urban Alt audience race and ethnicity composition



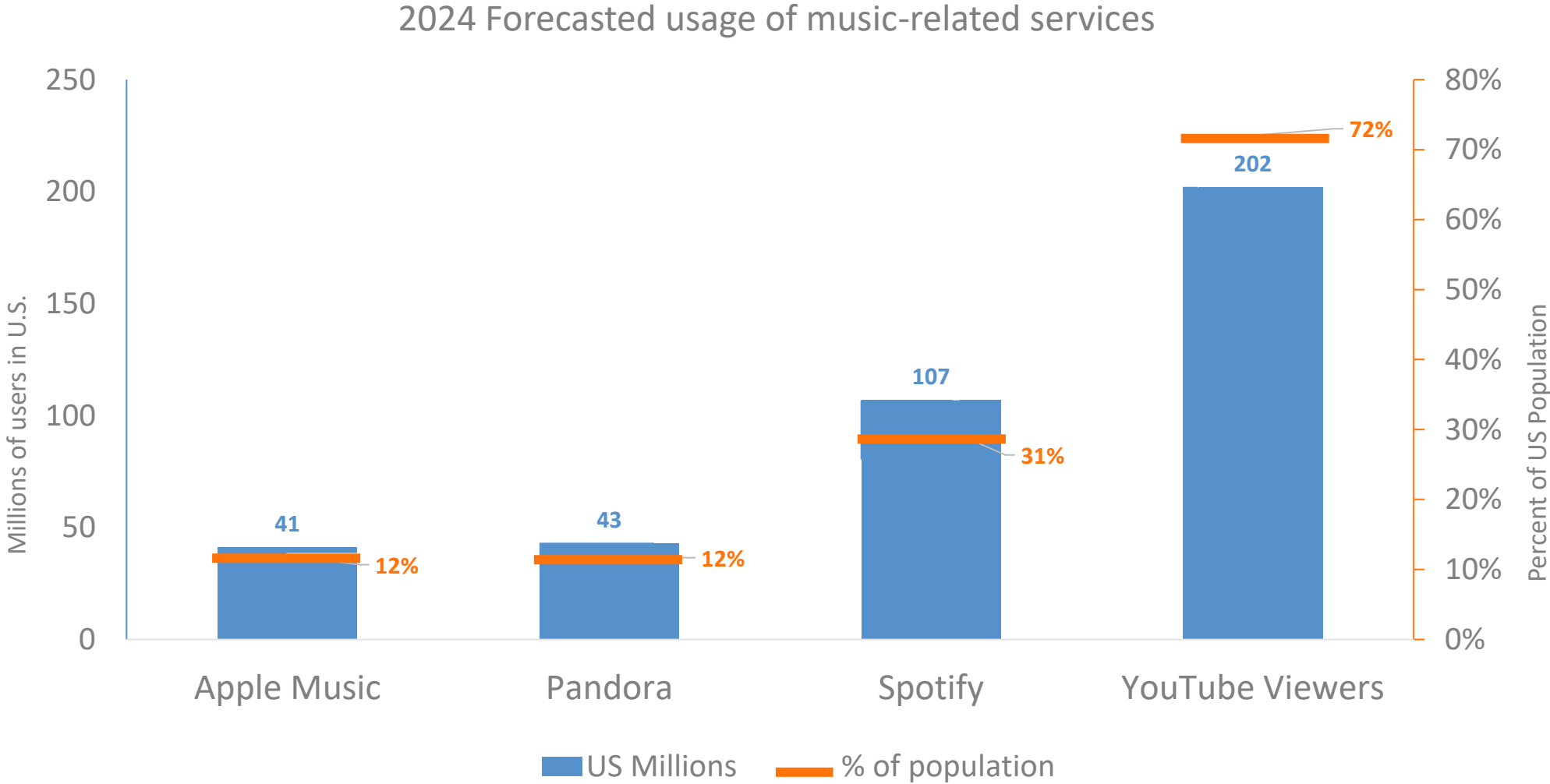


# Digital music consumption

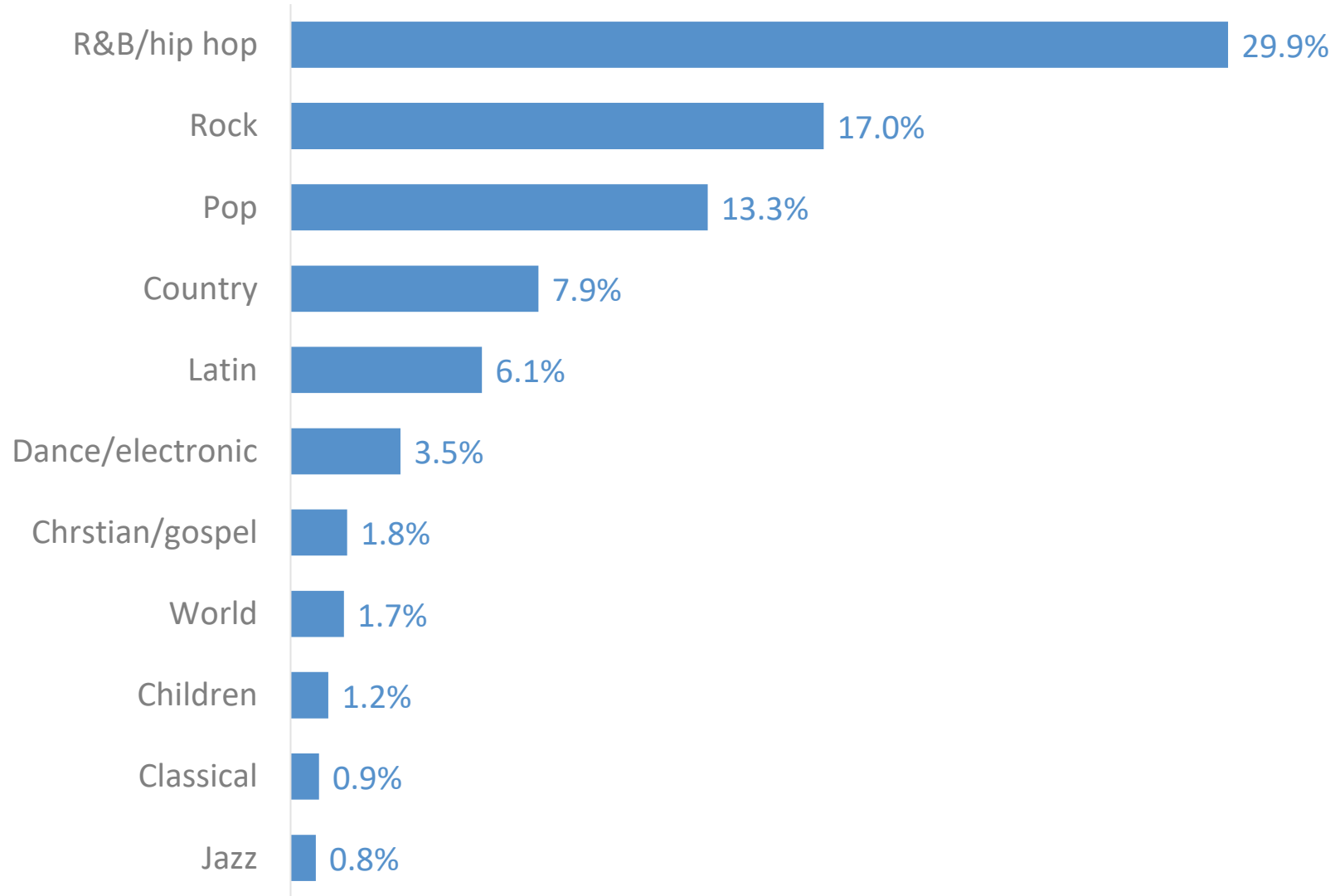
# 10%

of linear listening to public radio stations is streamed content  
90% is broadcast

# On-demand & streaming services vie for listeners' attention

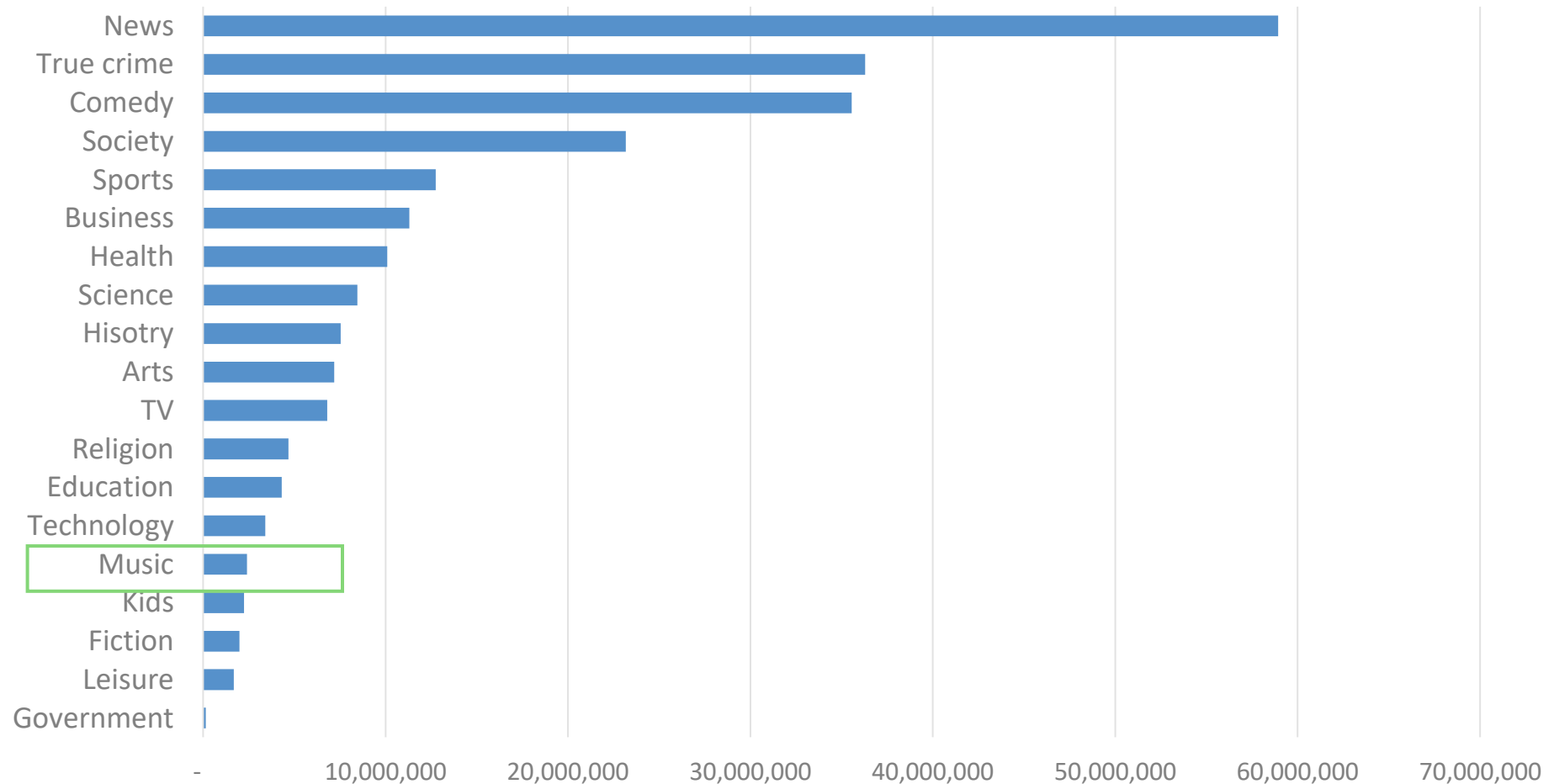


# R&B, Rock and Pop dominate streamed music consumption in the U.S.



# That said, music as a genre is not yet topping the podcast charts and is complicated by music rights

Monthly listener size of podcasts measured by Podtrac in each genre



## **NonComm Music outperforms broadcast benchmarks**

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- Stronger than commercial music
- Outperforms AQH PUMM
- Weathering news-fatigue storm
- AAA faring best among “legacy” music



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## **Urban Alt: attracting younger Black audiences**

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- Format focusing works to attract specific audiences
- That said, many stations /streams not found in Nielsen data

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## **Clear digital strategy needed among stiff competition**

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- On-demand, curated and visual music experience blanket the landscape
- Burgeoning social music may further change expectations
- No breakaway music podcast “hits”

# Q & A

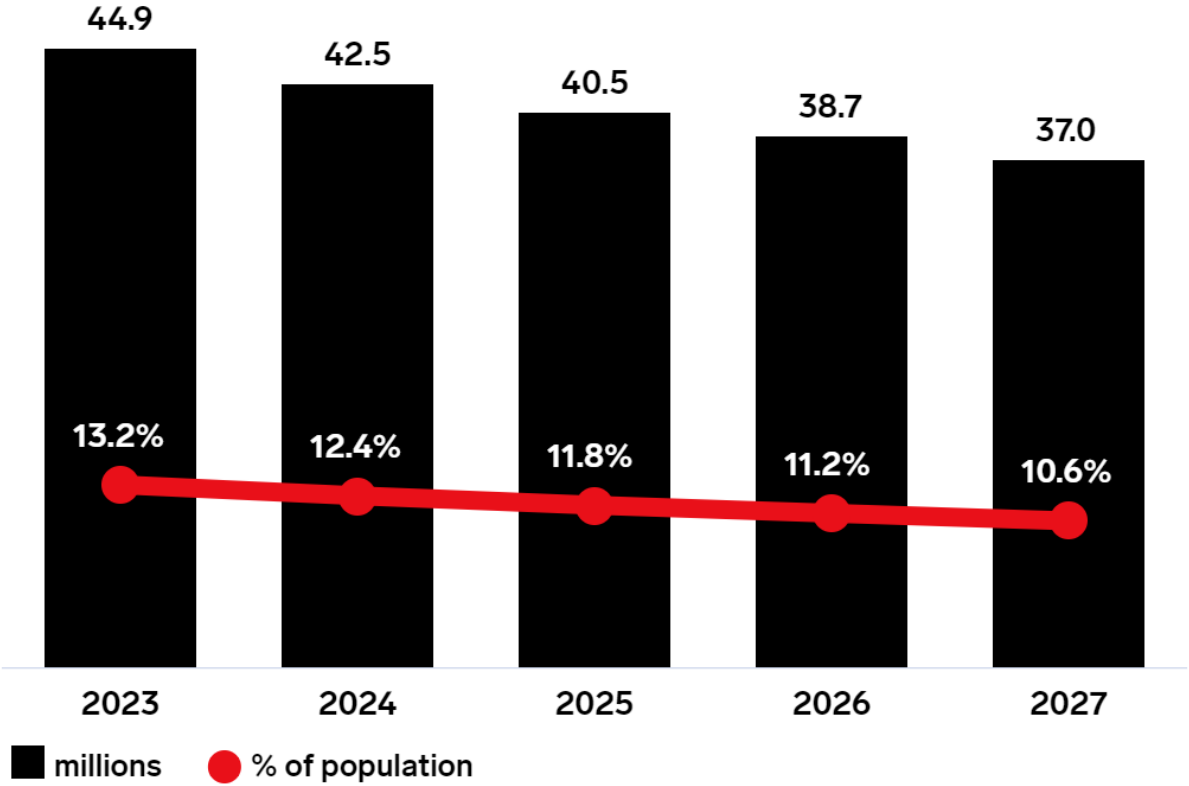
# Appendix

# Music podcasts span genres and styles of delivery

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**Pandora Listeners**

*US, 2023-2027*



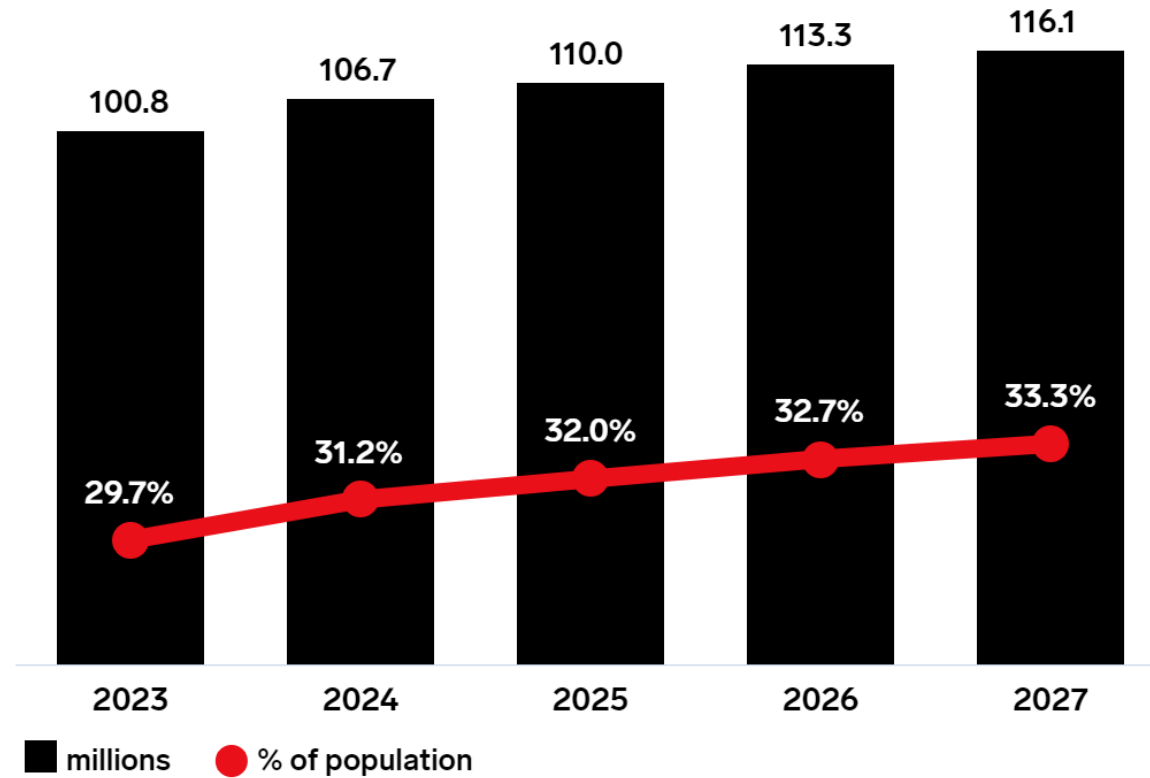
Note: internet users of any age who listen to Pandora on any device at least once per month

Source: Insider Intelligence | eMarketer, August 2023



## Spotify Listeners

US, 2023-2027

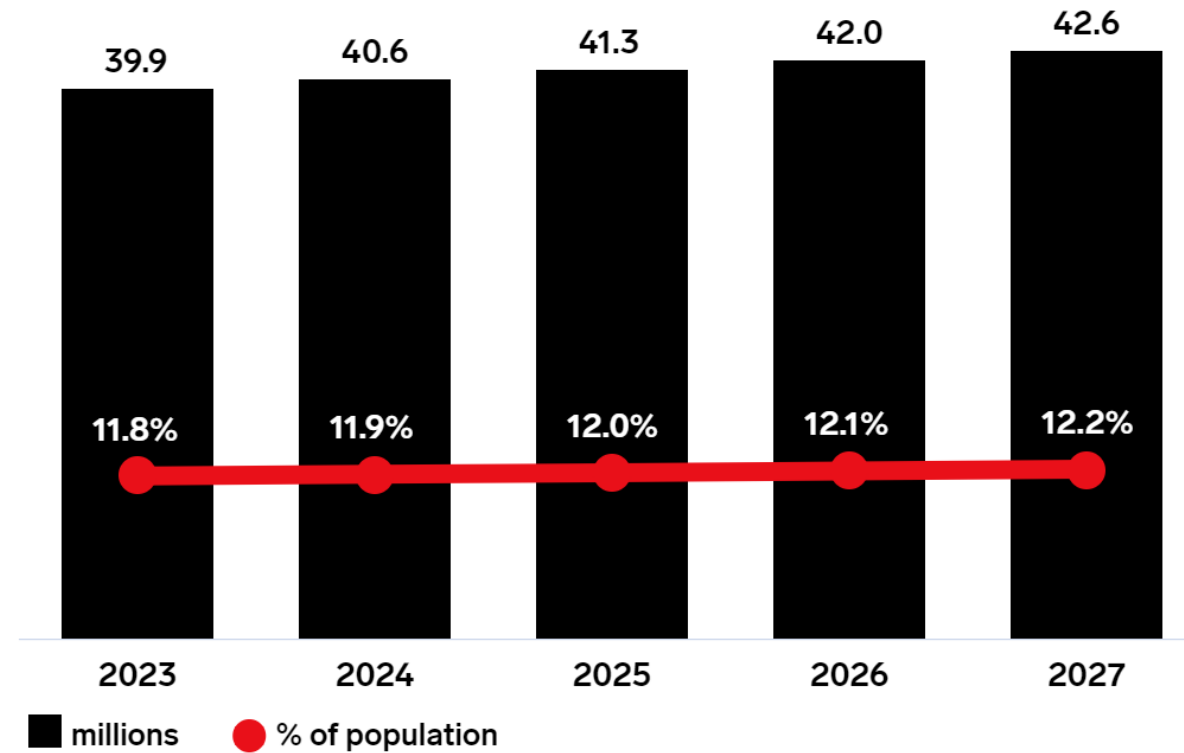


Note: internet users of any age who listen to Spotify on any device at least once per month

Source: Insider Intelligence | eMarketer, August 2023

## Apple Music Listeners

US, 2023-2027

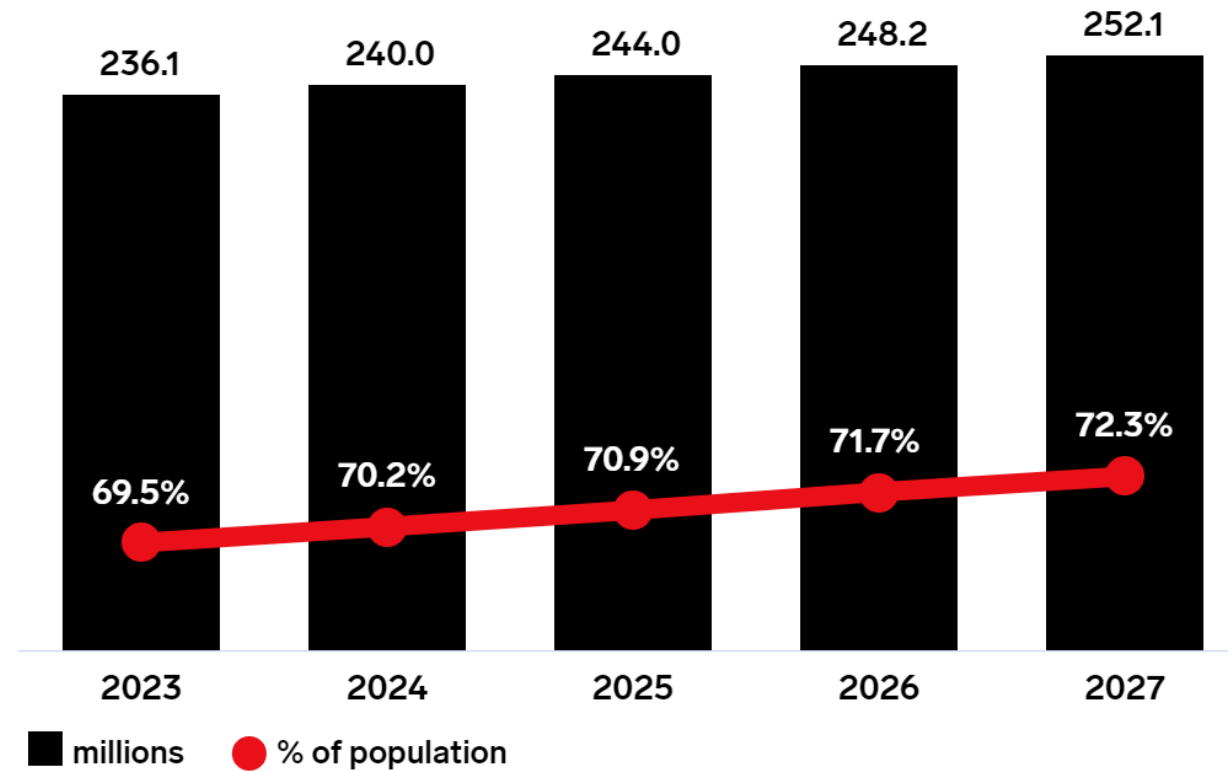


Note: internet users of any age who listen to Apple Music on any device at least once per month

Source: Insider Intelligence | eMarketer, August 2023

## YouTube Viewers

US, 2023-2027



Note: individuals of any age who watch YouTube via app or website at least once per month

Source: Insider Intelligence | eMarketer, February 2023