

What Does The Public Think About Public Radio?

2017

WHAT WE DID

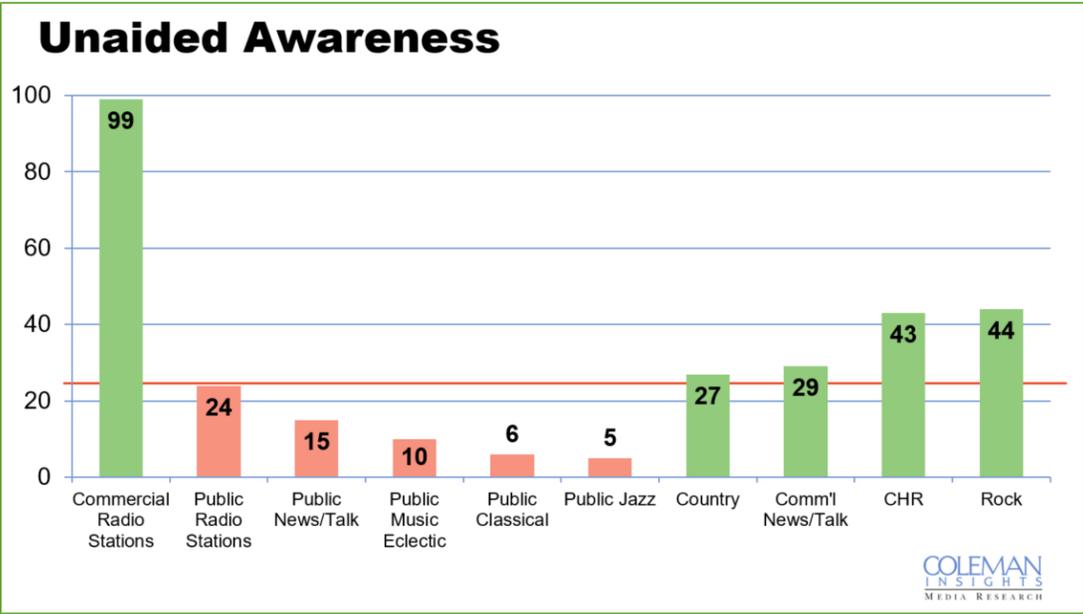
In the fall of 2016, Coleman Insights and the Public Radio Program Directors Association set out to investigate radio listeners' perceptions of Public Radio. We wanted to know what listeners think about Public Radio stations—if they think about them at all. To deepen our understanding, Coleman Insights conducted an online survey in which we interviewed 1000 randomly-selected radio listeners between the ages of 25 and 64 in 20 markets with a variety of Public Radio formats. We required that everyone in our sample listened to at least one hour of radio in the previous week, and we balanced the sample to reflect the listening population by age, gender, and ethnicity.

Within this report, we refer to all ad-supported radio stations as “Commercial” and all listener-supported stations as “Public,” regardless of specific format (i.e., Public News/Talk, Public Classical). These results focus mainly on a broad view of the “Public” radio category and its standing in the overall marketplace, with some detail on the performance of individual Public Radio formats.

LISTENERS DON'T KNOW YOU ARE OUT THERE

The most striking finding in this study is the low level of awareness of Public Radio as a category. Fewer than one in four radio users can call to mind any Public Radio station. Specifically, Unaided Awareness for Public Radio stations is only 24%, while 99% of listeners can recall a Commercial Radio station. Even if we treat Public Radio as a single radio “format,” awareness levels pale in comparison to popular Commercial formats such as Rock and CHR. The Rock format enjoys 44% overall awareness, for example, and CHR a very similar 43%—substantially greater awareness than all Public Radio stations as a group.

Awareness of individual Public Radio formats is even lower than the 24% awareness of the category as a whole. All Public News Talk stations, for example, are only familiar to 15% of radio listeners between the ages of 25 and 64. Public stations with an Eclectic music format are only familiar to 10% of listeners.



Low awareness for Public Radio stations is relatively consistent across age groups, so it is not a matter of older people recognizing Public Radio more than younger, or vice versa. Men are somewhat more likely than Women (30% vs. 20%) to be aware of a Public Radio station.

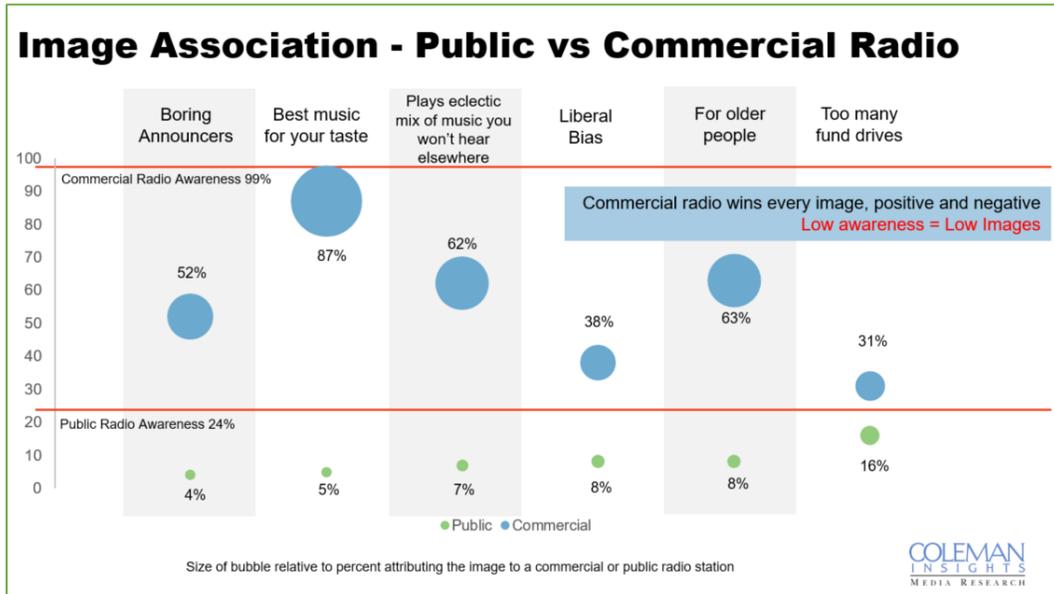
Such low levels of awareness will make it very difficult for Public Radio to develop strong brands in the marketplace, regardless of the quality of its programming. That is certainly not to say that consumers are not using Public Radio's product—or Public Radio does not have some very satisfied listeners—but there is not enough general awareness of the product to firmly establish mass market brands.

IMAGE IS EVERYTHING—MAKE SURE YOU HAVE ONE

In our experience, the most successful radio stations have established strong images or impressions in the minds of listeners. Successful stations become well known for a simple, clear concept that the listener can easily call to mind when thinking about the radio station. What we have learned is that if listeners do not have a basic idea of what a station delivers or represents, they will not remember to tune in when they have the opportunity to listen. This is why developing strong station images is so critical, and the core of our investigation.

On an encouraging note, Public Radio does not suffer from any overt negative images. In particular, Public Radio is not seen as boring, old, or biased. Only 4% of listeners associate Public Radio with “hosts and announcers that are boring to listen to,” and only 8% associate it with “geared towards people older than you” or “with an overly liberal bias.” To put this in perspective, we usually identify an image as significant when it is held by more than 20% of listeners. None of these negative images come close to a significant level for Public Radio, which of course is not surprising given our earlier findings about Public Radio’s low level of Unaided Awareness.

Cumulatively, it is Commercial Radio whose negative images are stronger. Indeed, 52% of listeners perceive that Commercial Radio has boring announcers, 38% of listeners see Commercial Radio as having an overly liberal bias and 63% of all listeners think Commercial Radio is geared toward older people. It should be noted that there are many more Commercial Radio stations than Public Radio stations, which may explain why Commercial Radio sees high numbers for these negative images, but ultimately, Public Radio does not suffer from them.



However, Public Radio doesn't have many significant positive images either. This tells us that Public Radio is not a deeply branded category. As a category, we see that Public Radio does have two significant images: "the Public Radio station" and "the listener-supported station." These images do not rise to the level of "dominant," meaning that in the overall marketplace, Public Radio does not have a stronghold on these images. (We recognize an image as "dominant" when it is greater than 40%). We will further discuss these two images in the next section, where we will go deeper into the challenges presented by them.

Beyond Public Radio's two leading images, there are no others that might add brand depth. In particular, only 14% of listeners associate Public Radio with "in-depth coverage of national and international news," an image that one might expect to be central to listeners' perception of Public Radio. Similarly, only 10% perceive Public Radio as "really connected to your local community," another presumed point of strength of the category.

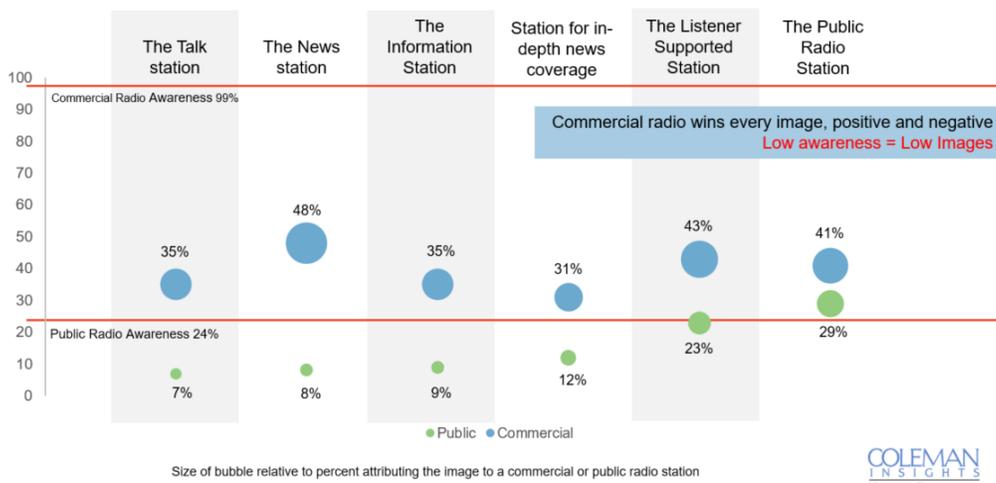
These findings underscore Public Radio's major obstacle: Overall, listeners have very little significant impressions or images of Public Radio stations' brands.

PUBLIC RADIO DOES NOT HAVE A STRONGHOLD ON ITS CORE CONCEPTS: "PUBLIC RADIO" AND "LISTENER-SUPPORTED RADIO"

As mentioned in the previous section, Public Radio does enjoy two significant images; what stands out, however, is that these two images are not dominant and that Commercial Radio overshadows Public Radio in these images. Public Radio’s image for “the Public Radio station” is 29%, while its image for “the listener-supported station” is 23%. As discussed earlier, an image of 20% or more is considered significant in the market and an image held by 40% or more of listeners is a dominant one—so large and strong that it will be difficult for any competitor to take that image from a station or category. So while Public Radio enjoys significant images for “the Public Radio station” and “the listener-supported station,” we would expect these images to be dominant for Public Radio, yet they fall short.

Even more striking is that Commercial Radio *does* have dominant images these two attributes. Remarkably, 41% of listeners associate “the Public Radio station” with a Commercial station, and 43% do the same for “the listener-supported station.”

Image Association - Public vs Commercial Radio



Images are not very strong among Public Radio Cume and P1 listeners either. Typically, a format captures much stronger images among its Cume and P1 listeners. Users and fans naturally develop stronger impressions of stations. While this is generally true among Public Radio stations, the category's images are not as strong as comparable base images of other formats. Where a typical format usually obtains images for its base concept of 60% among Cume, and 70% among P1s, Public Radio falls short of these benchmarks. Specifically, among its Cume listeners, Public Radio only has a 53% image for "the Public Radio station." That percentage only rises to 61% among Public Radio P1 listeners. In contrast, Country radio has an image for "the Country station" of 84% among Cume and 90% among P1 listeners. Similarly, Classic Rock has an image for "the Classic Rock station" reaching 70% among Cume and 74% among its P1 audience. Thus, even among users and fans, Public Radio has not developed a dominant image for its base position.

Moreover, images for Public Radio music formats are equally weak. Neither Public Jazz nor Public Classical stations have strong images for their base music positions. When we asked people to identify the "Classical music station," 24% named the Public Classical station in their market. Compare this to Classic Rock, which holds a 45% image for its base position, and Country, which holds a 55% image for its base position.

The same lack of association holds true for Public Jazz stations. In markets that have a Public Jazz station, only 18% of people call to mind a Public Radio station when asked to identify "the Jazz station".

KEY TAKEAWAYS

Public Radio is hampered by multiple obstacles. First, it lacks the requisite awareness for listeners to form deep impressions or images of the category. Second, there appears to be confusion in the marketplace regarding what stations are indeed “Public” and what stations are considered “listener-supported” as we see these two concepts more strongly associated with Commercial Radio than Public. Third, the category does not have any other images that rise to the level of significance.

LET PEOPLE KNOW YOU ARE HERE

Public Radio needs to generate greater awareness. This will require advertising and marketing. We understand this involves investments of finances and time, but advertising is the best way to get people to know you better—awareness will not happen organically, at least not at levels that will help Public Radio stations develop strong brands.

Because we see a lack of understanding of what a Public Radio station is and does, we recommend implementing focused campaigns, directed towards people who do not regularly listen to Public Radio stations. Each Public Radio market has its own unique audiences and challenges, so it is important to create campaigns that serve those markets individually.

To be effective, Public Radio stations need very clear language that tells people what they are—this will directly help build the images that are so important to creating a strong brand. The language stations use in their advertising should carry over onto the air and enforce those images among listeners.

TELL THEM WHO YOU ARE

On air, stations need language that tells listeners who and what they are. One of the ways that Commercial stations generate awareness is in the language that calls out their base music positions. In their taglines and messaging, they clearly identify who they are—think, “The Rock Station” or “Today’s Best Variety.”

Public Radio stations are not going far enough or being explicit enough when they identify themselves to their audiences. Public Classical stations should own the word “classical” and Public Jazz stations should own “jazz.” Even News and Talk stations would benefit from clearly telling their audiences what they program, as they face competition from Commercial News and Talk stations in their markets. “Public radio” does not specify the station’s format, so potential listeners will not know why they should tune into a public station. Clear, concise language is crucial when building your message—and therefore your awareness, which will lead to building your images.

BE CLEAR ABOUT WHAT “PUBLIC RADIO” MEANS

While we have seen that Public Radio lacks images overall, the images for which low numbers are particularly alarming are “the Public Radio station” and “the listener-supported station.” These are two of Public Radio’s core elements and the images that should set them apart from Commercial radio, but Public Radio is not getting credit for them. That listeners are more likely to associate these phrases with Commercial stations points to confusion—people do not know what these terms mean. There are two ways to do this: first, better describe Public Radio in your messaging, or second, find new words to explain to people what it means when a station is “Public” or “listener-supported”.

By using clear and explicit language on-air and in marketing messages, you can help listeners understand what it means to be a Public, listener-supported station.

DO YOUR RESEARCH

The key to better understanding your radio station is to uncover what your listeners and potential listeners really think of you. Perceptual research can help you get there. While we presented some general insights in this report, an individualized study can help you fully understand your station's brand and how to guide its success. Research can also find solutions to refine the language you need to develop your images and grow your awareness.

In order to truly learn what America thinks of Public Radio, the key is ultimately to look outside of Public Radio and understand the words real listeners are using to describe Public Radio and the type of programming they might find on it.

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