Media Disruption: Leveraging the Value of NPR Listener Profiles

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Background

As part of NPR’s 50-year legacy in the radio space, this first-of-its-kind report was commissioned with two key objectives in mind:

• to better understand today’s radio landscape; and
• to provide the sponsorship community with valuable insights into the attitudes and behaviors of radio listeners
RADIO: LIVE ON AIR AND EVERYWHERE
Radio has the biggest share of listening time, commanding 41% of audio listening of U.S. adults\(^1\)

63% of Americans listen to AM/FM radio each day\(^1\)

89% of Americans listen to AM/FM radio each week\(^2\)

Sources: 1. Edison Research Share of Ear © 2020 Q4, U.S. adults 18+ YouTube for music and music videos only. AM/FM Radio includes over the air and radio streams. Streaming Audio includes pure plays such as Pandora, Spotify, etc. 2. Nielsen, Q2 2020
There are six kinds of radio listeners across a spectrum of engagement.

- The more engaged group is more open to advertising.
- Most people believe ads are a fair trade for their listening time.
- NPR listeners are very open to its sponsorship messages.

Summary of Key Findings
Survey Methodology

- 1,500 online interviews
- Adults ages 18+
- Interviews conducted 1/13 – 1/21, 2021
- All respondents reported listening to AM/FM radio (traditional or streamed) in the last week
- Data weighted to match the sex, age, and ethnicity of AM/FM radio weekly listeners from the Edison Research and Triton Digital Infinite Dial 2020 report
Why do you choose radio?
Listener Segments
<table>
<thead>
<tr>
<th>Index</th>
<th>Radio Listeners</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>129</td>
<td>9% of radio listeners</td>
<td><strong>Radio Heads</strong>: Use radio for everything</td>
</tr>
<tr>
<td>11</td>
<td>16% radio listeners</td>
<td><strong>Connection Seekers</strong>: Use radio for connection</td>
</tr>
<tr>
<td>2</td>
<td>18% radio listeners</td>
<td><strong>Infomaniacs</strong>: Radio listening is driven by news</td>
</tr>
<tr>
<td>108</td>
<td>27% of radio listeners</td>
<td><strong>Rhythm Rockers</strong>: Radio listening is driven by music</td>
</tr>
<tr>
<td>100</td>
<td>17% of radio listeners</td>
<td><strong>Laid-back Listeners</strong>: Listen to radio in the background</td>
</tr>
<tr>
<td>94</td>
<td>13% radio listeners</td>
<td><strong>Habitualists</strong>: Listen to radio when it’s the only option available</td>
</tr>
</tbody>
</table>

How to read: In this index, the average time spent listening among all weekly radio listeners is represented as 100. An index number of 102 means a 2% more time listening than the average of all listeners and an index number of 98 means a 2% less time listening.
Listener Segments: Most Time Spent Listening

Radio Heads
Use AM/FM radio for everything – music, news, personalities/talk, and sports.
- All-around audiophiles
- Spend the most time with audio
- Listen beyond the AM/FM dial
- Advertiser-friendly

Connection Seekers
Listen to the radio for companionship
- Prefer spoken word
- Listen at home
- Hug the average
- Advertiser-friendly

Source: Radio: Live On Air and Everywhere from NPR and Edison Research
Listener Segments: Content-motivated

- **Rhythm Rockers**
  Radio listening is driven primarily by music
  - Youngest segment
  - Heavily female
  - Streamers
  - Radio-driven

- **Infomaniacs**
  Radio listening is driven by news
  - Morning listeners
  - Prefer spoken word
  - Highly educated; skew male
  - Open to advertisements

Source: Radio: Live On Air and Everywhere from NPR and Edison Research
Listener Segments: Least Engaged

**Laid-back Listeners**
Listen to the radio when they want something in the background
- Radio-centric
- Prefer music
- Prefer AM/FM over-the-air
- More than half listen to ads

**Habitualists**
Listen to the radio when it’s the only option available
- Audio ambivalent
- Prefer music
- Value radio
- More than half listen to ads

Source: Radio: Live On Air and Everywhere from NPR and Edison Research
Weekly AM/FM radio listeners vs. NPR listeners

Source: Radio: Live On Air and Everywhere from NPR and Edison Research
Listener Segments
Radio Advertising
The heaviest users of radio are also the most open to its advertising messages

% who typically listen to sponsorships or advertisements while listening to AM/FM radio:

- **Radio Heads**: 72%
- **Connection Seekers**: 70%
- **Infomaniacs**: 65%
- **Rhythm Rockers**: 64%
- **Laid-back Listeners**: 59%
- **Habitualists**: 58%

*Typically listen* = answered “sometimes”, “hardly ever”, or never” to “How frequently do you try to avoid sponsorships or advertisements while watching or listening to radio?”

Base: Exposed to ad on radio in the last week
Source: Radio: Live On Air and Everywhere from NPR and Edison Research
AM/FM radio listeners are more engaged with ads on radio than ads on TV or social media

% who typically listen to or watch sponsorships or advertisements while engaging with each platform:

- NPR: 67%
- Podcasts: 65%
- AM/FM Radio: 64%
- Online audio services: 62%
- Streaming television/online clips: 58%
- Live or recorded television: 56%
- Social media: 51%

“Typically listen or watch” = answered “sometimes”, “hardly ever”, or never” to “How frequently do you try to avoid sponsorships or advertisements while watching or listening to… [each medium]?”

Base: Exposed to ad on [medium] in the last week
Source: Radio: Live On Air and Everywhere from NPR and Edison Research
Agree/Disagree: Listening to/watching ads is a fair trade for the free content you get on [platform]

% agreeing

- AM/FM Radio: 47%
- TV/Streaming video: 36%
- NPR: 51%

Base: Used platform in the last week
Source: Radio: Live On Air and Everywhere from NPR and Edison Research
Agree/Disagree: You learn about local businesses from advertising on [platform]

% agreeing

- AM/FM Radio: 47%
- TV/Streaming video: 31%
- NPR: 45%

Base: Used platform in the last week
Source: Radio: Live On Air and Everywhere from NPR and Edison Research
As a result of hearing an advertisement on [platform], have you ever….?

- Considered a new company, product, or service
- Gathered more information about a company, product, or service
- Purchased a product or service
- Recommended a product, company, or service to others

Source: Radio: Live On Air and Everywhere from NPR and Edison Research
**Agree/Disagree:**

<table>
<thead>
<tr>
<th>Platform</th>
<th>% Agreeing</th>
</tr>
</thead>
<tbody>
<tr>
<td>AM/FM Radio</td>
<td>29</td>
</tr>
<tr>
<td>TV/Streaming video</td>
<td>25</td>
</tr>
<tr>
<td>NPR</td>
<td>46</td>
</tr>
</tbody>
</table>

**Source:** Radio: Live On Air and Everywhere from NPR and Edison Research

- Your opinion of a company is more positive when you hear it mentioned on [platform].
- You are more likely to trust a company that you hear advertised on [platform].
How do you respond to radio advertising?
Monique, 27
Infomaniac
NPR Radio Sponsorship Impact
Percent lift for NPR radio listeners vs. non-listeners

+23% Brand awareness

+71% Reported website visits

+13% Interest in learning more about sponsor brands

Source: Lightspeed Research, NPR Sponsorship Studies 2018-2021
Radio remains an important part of the media landscape – especially for the most engaged segments of listeners.

These more engaged segments are particularly open to advertising and believe it’s a fair trade for their listening time.

The NPR radio audience over indexes for the more engaged radio segments, is more likely to take action from brand messages, and more likely to think better of brands that they hear on public radio.

3 Key Takeaways
Report Release

• Findings presented in webinar on April 15 by NPM’s Lamar Johnson and Edison’s Megan Lazovick

• Videos and full report available for download on the National Public Media website
  – 682 webinar registrations
  – 860+ report downloads to date

download at: npr.org/radioiseverywhere
Report Promotion Strategy

Pre-Webinar
- Webinar promotion via NPM & Edison social media accounts
- Email marketing save-the-date
- Media advisory distribution

Post-Webinar
- Press release distribution
- Report promotion via email marketing from NPM & Edison
- Social promotion
- Sponsored content
Further Promotion To Drive Sales Leads

• To promote exclusive, custom research report + generate qualified sponsorship leads for NPM

• Chose LinkedIn as preferred platform for efficient audience targeting which resulted in:
  • 470k impressions
  • 10.99% lead form completion rate 22% higher than LinkedIn’s benchmark
  • 143 lead form completions
On The Road

• Engage current clients and agencies with exclusive virtual “lunch & learn” presentation
• Invitations sent by sales to key contacts & prospects
• Meetings scheduled with key media agencies:
  – Carat (Chevrolet)
  – The Richards Group (various clients)
Thank you!

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