



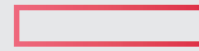
Executive Summary of Findings

March 4, 2025





**GREATER
PUBLIC**



Dear Public Media Colleagues,

Greater Public, the Public Media Content Collective (PMCC), and Station Resource Group worked together with City Square Associates to produce 2023's Meta-Analysis of audience research projects that had been conducted at more than two dozen local public media organizations during the preceding several years. The Meta-Analysis findings were compelling:

- Where news and public affairs is concerned, audiences expressed a clear desire for the kinds of programming and experiences that local public media creates; however, they did not view public radio news programming as “made for them.”
- Where music programming is concerned, “authenticity” is particularly important to younger audiences, and public radio stations are often viewed as “too mainstream.”

The Meta-Analysis also provided a “prescriptive playbook” to help local stations respond to these and other findings with a range of specific suggestions to improve their local content, engagement, and experiences.

Still, the Meta-Analysis raised as many questions as it answered. What's more, it has been more than a decade since there had been anything approaching systematic national research into local public radio audiences. So, in 2024, Greater Public, PMCC, and SRG decided to identify opportunities for local public media organizations to better serve their communities by researching the unmet needs of those communities. And let's be clear: our shared aspiration was that RUN—Researching Unmet Needs—would be a big research project with significant and actionable findings for local public radio and public television.

Throughout last year, our partners at City Square Associates turned RUN into one of the largest audience research projects in public broadcasting history, interviewing more than 30,000 people across the country. And RUN's findings are both significant and actionable. We believe these findings go beyond audience research, per se, to providing a foundation for public media to chart a successful path forward to better serve our communities and our country in the 21st Century's multi-platform, multi-product media ecosystem.

We hope you find RUN's results as exciting and invigorating as we do, and we look forward to discussing and acting upon these findings with you in the months and years to come.

Sincerely,
Joyce MacDonald, Greater Public
Abby Goldstein, PMCC
Bill Davis, SRG



Introduction

Launched in Spring 2024, the Researching Unmet Needs (RUN) study was conducted to identify gaps in community needs that public media organizations are uniquely positioned to address. This comprehensive research effort—a partnership between SRG, Greater Public, and PMCC—utilized a combination of national surveys and focus groups to uncover insights about public media's role in audience engagement and community service.¹ This study is one of the largest of its kind in public media history, encompassing responses from approximately 30,000 individuals from across the country. The findings reveal significant audience needs in both news and music domains, with an emphasis on local storytelling, trust in news, live event engagement, and a desire for uplifting content.

This executive summary is designed to report the findings at a high level. It will be followed by a series of live presentations and working sessions scheduled to take place between March and September, culminating with the national meetings of Greater Public (July 7-10), PMCC (August 25-28) and SRG (September 7-10). *The ultimate objective of this undertaking is to drive conversations, inspire innovation, and inform decision-making about the future of public media and its unique role in serving local communities.*

The key findings are organized under five key themes.

1. There's a powerful craving for community and live local connection.

People want to know their local areas better and to connect with other members of their community, not only virtually but live and in-person. This appetite manifests itself both in the priority they assign to learning more about “things happening in my city, town, or neighborhood” and their enthusiasm for things like local event calendars and live local musical experiences that are small and intimate.

In the news and information vertical, more respondents expressed an interest in local content than in any other of 17 content areas, and most of those who gravitate toward local content don't think there's enough of it available. (Figure 1) By comparison, while interest in news and information about “politics and government” is also strong, the proportion of those who want more is very small.² Local stories are the top unmet information need in each of the 19 local markets over-samples and among Americans of all political orientations from very conservative to very liberal. “Things happening in my city, town, or neighborhood” is a content area prioritized especially among women, GenXers and Boomers, as well as people who live in rural areas. Related to this finding is the fact that more than half of respondents agreed to the sentiment “Supporting local journalism is an important way to help preserve democracy.”

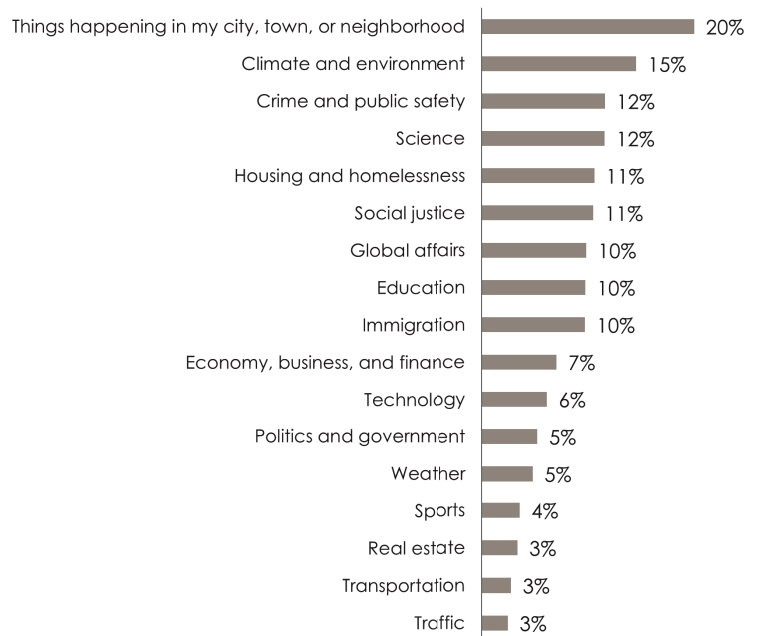


Figure 1 - % of US adults interested in each subject area and say there's not enough available.

Localism also emerged strongly in the music vertical. Among the most popular of 14 different music formats tested were “live concerts or shows.” A majority those interested in them say there aren't enough. People in the focus groups elaborated on the theme, telling us that they're looking for live events in intimate local settings, ways of connecting with others in their community in-person, and opportunities to get acquainted with local artists. Also popular among the music offerings tested was “a calendar of concerts and performances happening in my area,” and those who say they're interested also overwhelmingly report that they're in short supply. Here again, the focus groups were illuminating, as participants talked about how much



they'd like to have a reliable source for this kind of local information—a calendar that's well-curated, easy to navigate, easy to filter and customize. From the point of view of increasing community service, it's noteworthy that the unmet need for this kind of calendar was particularly felt among members of the public who aren't well informed about public radio—an opportunity perhaps to reach community members not currently reached.

It is also worth noting that, location was a major factor in the relative appeal of different genres. Jazz, for example, is nearly twice as popular in the New York City DMA than it is in the state of Utah. Country is much more popular in Nebraska and Oklahoma than in the Washington DC/Hagerstown DMA. As one of the few remaining locally owned and operated media entities in many of the markets they serve, public radio stations are uniquely positioned to program specifically for their own local communities, something that people seem to value in the otherwise homogenous world of commercial media.

2, There's trust vacuum and a certain skepticism of authority.

In the news and information space, people are reporting a shortage of content that is “carefully researched” and “something that I can trust.” They wish there were more “in-depth stories brought to light through investigative reporting.”

Nearly three quarters of US adults say they're “concerned about the accuracy and reliability of the news I come across these days,” and this concern about the trustworthiness of the news and information that's out there in the universe is especially strong among men, Boomers, people who live in urban communities, those who identify as politically conservative, and those who are civically engaged. This is probably because the vast majority assign a very high level of importance to these two attributes of news and information content: “It's something I can trust” and “It's carefully researched.” These same respondents overwhelmingly say there's not enough of this kind of content out there for them. (Figure 2) The interest in the appetite for more trustworthy storytelling, was a little bit higher among those who describe themselves as “somewhat liberal,” but it was also a little higher among those who are “somewhat conservative.” Connected with this finding is the fact that “in-depth stories brought to light through investigative reporting” is the most popular of ten different kinds of news. The majority of those who gravitate toward in-depth stories say there's not enough of this kind of content out there for them either.

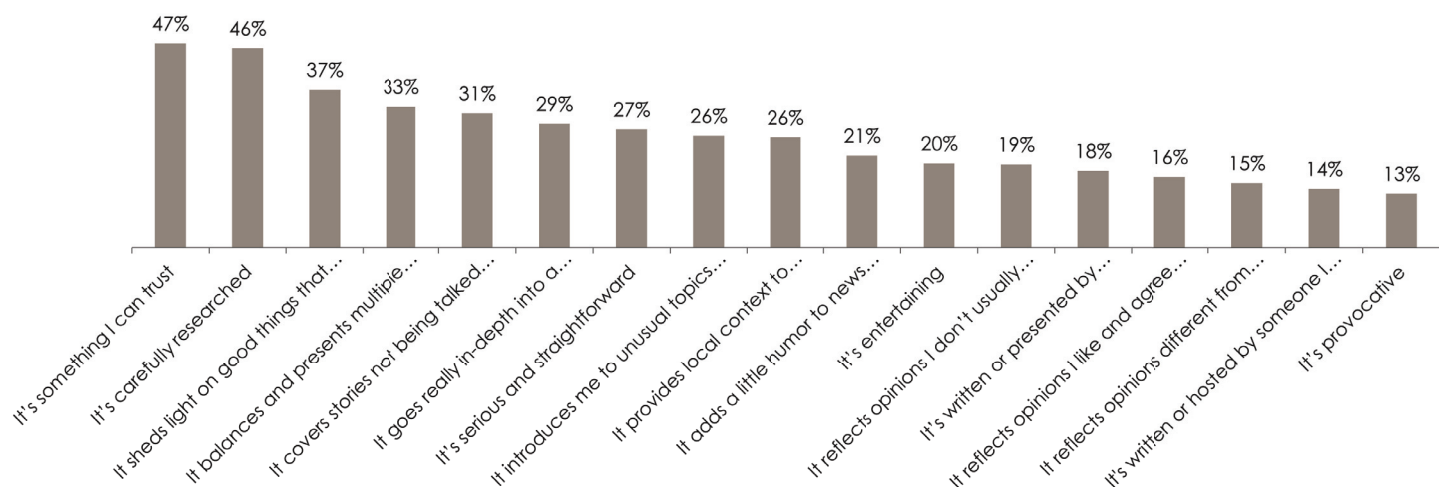


Figure 2 - % of US adults who want the news and information they consume to have each characteristic and wish there were more.



Even in the music space, participants in the focus groups conveyed that they are wary of “curated” playlists that come from unknown or unfamiliar sources, and want to be able to select what they want from a broad array of options. And in an algorithmically-driven music ecosystem, a playlist curated by someone they know, whose taste in music they share, is of interest to many. This is an example of another need that the market, left to its own commercial dynamics, is not currently meeting.

3. People are looking to be uplifted

When asked what they hope to get from the news and information content they consume, people most often gravitate toward that which “makes me feel hopeful” or that which “helps me become a better person.” The majority of those who typically look for this kind of content say there’s not enough of it. (Figure 3) Daily users of public radio especially identified content “that makes me feel hopeful” as an unmet need, but it was a need expressed across behavioral and demographic segments. This is entirely consistent with the finding that a majority of Americans assign a high degree of importance to whether the news “sheds light on good things that are happening in the world”—another characteristic of the news and information most consider to be in short supply.

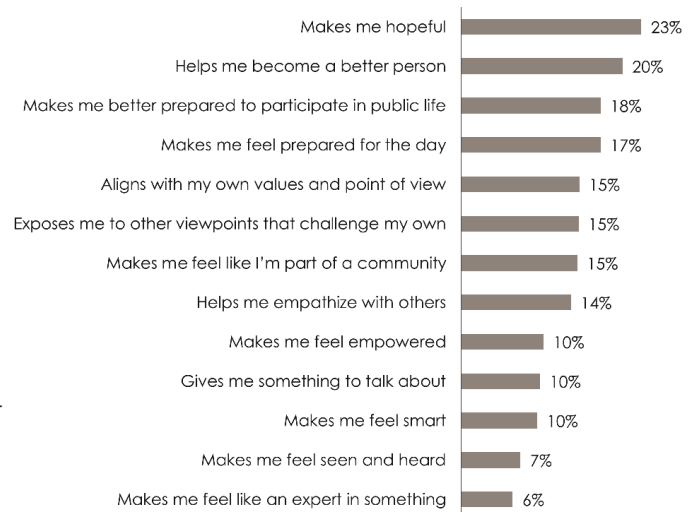


Figure 3 - % of US adults looking for the news and information they consume to provide this benefit and wish there were more.

Evidently the desire to be uplifted is also the main driver of music listening. Among 15 possible “jobs” that they’re looking for music to do in their lives, being uplifted is at the very top of the list, especially among African-Americans. “Tuning out the rest of the world” is also a top-tier gratification—a finding that aligns with what a 2024 study by the APM Research Lab described as the nation’s “angry mood”³ and themes we heard in the RUN focus groups. The findings clearly underline the potential value of public media’s music services at a time when many people feel burdened by an overwhelming sense of political polarization and anxiety about mental health, climate change, and the cost of living.

4. Public radio is not widely recognized, understood, or engaged with.

The research demonstrates conclusively that the term “public radio” itself means little for a majority of Americans, many of whom seem to assume that the phrase is simply a generic reference to the free audio they can tune into while driving or with any AM/FM radio tuner. Fewer than one in ten were able to identify their local public radio stations specifically or accurately, even after the concept of “public radio” was explained to them in the survey. The evidence from other parts of the survey suggests that the relatively low unaided awareness is a function of a very crowded media environment, where use of radio in general—not just public radio—is near the bottom of the list in self-reported usage of various media platforms.

In one of the few open text questions of the entire survey, respondents were asked what comes to mind when they think of “public radio.” There were many references to things like “classic rock” or “radio sweepstakes” along with references to things like “contributions from listeners” and “local NPR station.” Utilizing a language model well-suited for text classification,⁴ just over a quarter of respondents can be classified as “informed,” with the rest designated as uninformed or indeterminate. These same open-text responses were also subjected to sentiment analysis, and nearly three quarters turned out to be neutral or purely descriptive, with the remaining ones nearly twice as likely to be positive as to be negative.



It should be noted that most of the survey was conducted blind, meaning that respondents were unaware the research was being conducted on behalf of public media. But toward the end of the questionnaire respondents were provided with a brief definition of public radio and asked whether they knew the names of any local public radio stations. 9% offered a local public radio station reference (e.g., call sign, organization name, or station frequency) determined to be valid for their specific zip code. Another 3% offered a generic reference to NPR. The remaining 88% either offered an invalid station reference or said they couldn't recall. Those who provided a valid station response tended to skew older, white, more affluent, and college educated, underlining the opportunity that exists for local public radio to reach other parts of their communities by addressing the unmet needs identified in the research.

But the research suggests that attempting to reach these parts of the community through the use of traditional radio alone is not feasible. In the news and information space, Millennials and Gen Zers are much more likely to be using "short videos on social media" and YouTube videos "to get the news and current events information [they're] most interested in." And even among Boomers and Gen Xers, "TV news programs" are a much more popular source for news and information than "radio news programs." In the music space "listening to music using a streaming platform is the top method for listening to music in all generational cohorts, except for Boomers. Although more than half of Boomers and Gen Xers say they're "listening to music from a radio station," only 42% of Millennials and 19% of Gen Zers are relying on the radio for music. The latter, for example, are much more likely to be using YouTube for music. The evidence strongly suggests that a cross-platform, multi-platform approach, together with live local events, are necessary to adequately meet community needs.

5. Public media is nonetheless well-positioned to deliver on unmet needs and specific community services.

Most of the unmet needs uncovered in news and music are also things public media is well-positioned to provide. People also found value in specific community services that extend somewhat beyond the unmet needs uncovered by the research.

"Things happening in my city, town, or neighborhood" is clearly in the top tier of unmet needs that respondents in the RUN study believe public media is well-equipped to address. Topics like the climate and environment, social justice, and housing/homelessness are also perceived to be the public media wheelhouse, even though they are not as broadly popular as local stories are. Similarly, respondents in the study overwhelmingly see public media as a good potential source for news that's "carefully researched" or "something I can trust"—unmet needs that surfaced prominently in the RUN study.

Musically speaking, respondents who identified "a calendar of concerts and performances in my area" as an unmet need seem to think this is the kind of thing that that public radio would be able to do well, though fewer seem to picture public radio as the actual producer of the live concerts or shows. People who are looking to be uplifted by the music they listen are also a little less likely to identify public radio as a good source for this than it is for music that's "presented without commercial interruption" or "presented with commentary about the song, artist, or composer." Evidently, many Americans think of what public radio typically provides as pretty serious in tone.

The survey also measured the perceived value of the services that public media organizations typically provide beyond the presentation of news and music. (Figure 4) Providing "emergency alerts and updates during crises" ranked first among nine possible services, and respondents in rural zip codes especially valued this capability. Emergency alerts and updates also over-indexed in North Carolina, Nebraska, Central Virginia, Oklahoma and Utah—most likely because the proportion of rural residents in those communities is higher than it is in other parts of the country.



Providing “a calendar of events or things to do in your area” ranked second, and producing “content that highlights local culture, history, artists, and musicians” ranked third and fourth respectively. Especially in urban communities, this latter service seemed to be of value, reinforcing the first main finding of the research, namely the craving that people have for local content and local connections. This was particularly salient in markets like Washington, DC, Minnesota, Jacksonville, Colorado, New York City, and Philadelphia. Clearly, public media’s strength is its localism: an ability to provide service and build communities in different regions of the country, regardless of political orientation, irrespective of cultural, ethnic or racial identity.

	Rural	Less Urban	Urban
Provide emergency alerts and updates during crises (like severe weather or active shooter situations)	46%	44%	39%
Provide a calendar of events or things to do in your area	35%	35%	32%
Provide public service announcements (PSAs) about health and safety	30%	33%	29%
Produce content that highlights local culture, history, artists, or musicians	28%	30%	33%
Host events like festivals, concerts, or walking tours in your area	26%	26%	27%
Produce on-air programs that feature discussions of local issues or politics	25%	28%	30%
Provide free educational resources and programming for young kids	20%	19%	20%
Livestream or broadcast town hall meetings or similar public gatherings	17%	16%	20%
Host live discussions or forums with community members that you can attend in-person or livestream	14%	15%	20%

Figure 4 - % of US adults who consider each service potentially provided by a local public radio station to be of particular value, cross-tabulated by urban-rural designation of respondent zip code.

Finally, those who were aware (on an unaided basis) of their local station had slightly different priorities for public radio than those who were not. For example, they valued “programs that feature discussions of local issues and politics” and “content that highlights local culture, history, artists, and musicians” more than those who weren’t able to accurately name their local public radio station. This underlines one of the important challenges and opportunities for public media generally: continuing to serve well the audiences that have already been reached whilst extending the service of public radio to those in the community whose experience of it is currently limited. Focusing sharply on the needs the research has uncovered—needs that many Americans believe the marketplace is not currently addressing—seems a promising place to begin.

Next Steps

In partnership with SRG, Greater Public, and PMCC, City Square Associates will shortly unveil a dashboard analytics tool that will enable both local and national content producers to identify and develop programs, products, and experiences that directly respond to the unmet needs of specific communities. This can be a powerful tool for public media to be more relevant in the civic, cultural, and artistic lives of their service communities by simultaneously extending their reach to new audiences while better serving their existing audiences. Expanding audiences and increasing relevance should also create opportunities for local public media to increase revenue from membership, major giving, philanthropy, and corporate support. This, in turn, would provide valuable operating and investment capital as public broadcasters make the transition from local terrestrial radio and television stations to multi-platform community media institutions.

This research will also help inform public media investments in developing new products and experiences on emerging digital platforms. *If public broadcasters are to fully realize the promise of their public service mission, they will need to create and provide the right content and experiences on the right products and platforms at the right time all the time.* The RUN initiative will be invaluable for insights into creating the right content and experiences, but more limited in its insights into identifying optimal distribution products and platforms. For that, we believe subsequent research into the ethnography of media consumption that is informed by the RUN findings will be a critical next step to ensure public broadcasting’s ability to thrive in a multi-platform, multi-product environment.

Endnotes

1 The research was conducted in two distinct but related phases. The first phase of work took place between June and October, when City Square Associates fielded a survey to a national sample of 10,002 adults 18+ geographically and demographically representative of the U.S. population. The same survey, with a limited number of custom questions, was also conducted in 19 distinct local markets, with samples of 500-1,000 (depending on local market size), adding another 12,584 responses to the total data set. In addition, the survey was conducted among constituents (members, email subscribers, event attendees) from 10 of these 19 markets, yielding another 8,517 responses. The second phase of work consisted of 20 focus groups with both members of the general public and local public radio station listeners during the month of October. These groups were organized to explore more deeply some of the findings from the quantitative phase of work. A total of 92 US adults from across the country participated in 20 professionally moderated sessions that were conducted online. This executive summary is based primarily on the learning from the national survey sample, interpreted in light of the focus groups.

2 Questions designed to identify unmet needs were answered by respondents in two steps. First they were presented a list of options and asked to select those of personal interest. Then, only for the ones they had selected, they were asked whether there was too much, just the right amount, or not enough currently available. Figures 1-3 show the percentage of US adults who both expressed an interest in *and* say there's not enough of each.

3 Craig Helmstetter and Eric Plutzer, "Mood of the Nation: Angry," April 23, 2024, <https://www.apmresearchlab.org/motn/what-makes-americans-angry-proud>

4 To automate the classification of open-ended responses about public radio as "informed," "indeterminate," or "uninformed," we fine-tuned an existing language model known for effective text classification ("google-bert/bert-base-uncased"). The initial training used a random subset of 3,000 responses, each independently labeled by four human raters with one of the three categories. Majority vote decided the final classification for each statement. We followed an iterative fine-tuning approach that allowed us to optimize the model's performance up to an effective limit.



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