



Phil Cook

Senior Research Director, CSA



Chris Schiavone

President, CSA



Sam Luz

Research Manager, CSA



Lindsay Kimball

The Current



Frank Dominguez

WDAV



RUN University

Using Music to Build Communities and Uplift Audiences



June 16, 2025



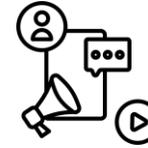
Fundraising

Fundable Ideas and Funding Strategy

Webinar: Monday, June 2
Workshop: Wednesday, June 4



Special Guest:
Margaret Hunt
Hunt Philanthropic



Marketing

Telling Our Story, Reaching People Where They're At

Webinar: Monday, June 9
Workshop: Wednesday, June 11



Special Guest:
Briana O'Higgins
Greater Public



Music

Using Music to Build Community and Uplift Audiences

Webinar: Monday, June 16
Workshop: Wednesday, June 18



Special Guests:
Frank Dominguez, WDAV
Lindsay Kimball, The Current
Tamberly Ferguson, WDAV
Matt Reilly, KUT



News

Content and Audience Development in the News Space

Webinar: Monday, June 23
Workshop: Wednesday, June 25

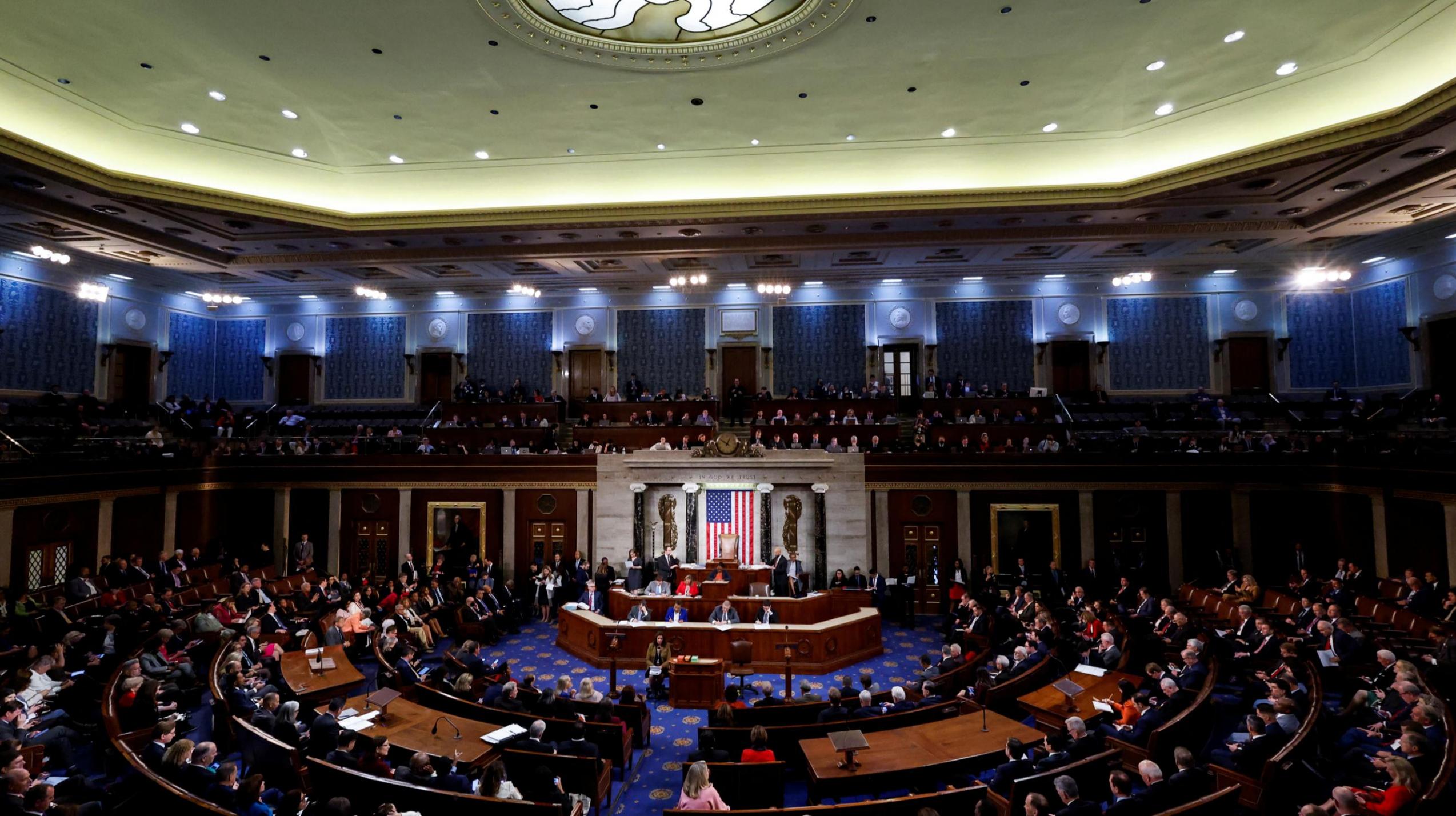


Special Guests:
Ashley Alvarado, TPR
Megan Garvey, LAist
Rachel Estabrook, CPR
Kevin Dale, CPR
David McGowan, WJCT

Our goals for today

A high-level review of findings from the research that are relevant to the work you do in programming, engagement, and audience development

Provide the data you can use to refine and guide the ways in which you use music to build community



Music-focused audience development themes from the RUN study

Music as a refuge

Delivering on the role people expect music to play in their lives

The dominance of streaming

Preferences for self-curation and algorithmically-driven discovery

The need for in-person connection through music

Local community events as an unmet need and differentiator

Own the local music scene

Promoting local artists and telling their stories

Expand your genre palette

Finding ways to crossover and blend genres people most enjoy

Music as a refuge



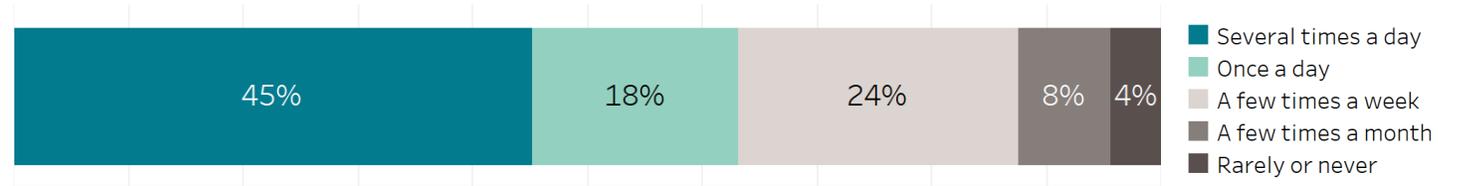
Frequency of consumption

Over 60% of Americans listen to music at least daily



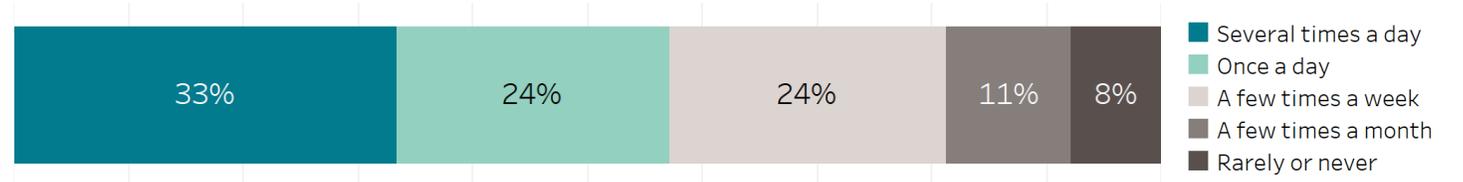
Frequency of listening to **music of any kind**

Question text: How often do you typically listen to music of any kind?



Frequency of watching, reading, listening to **news & current events**

Question text: How often do you typically watch, read, or listen to news and current events of any kind?



Frequency of consumption

Evidence that those who avoid news tend to be regular music listeners instead



Frequency of watching, reading, or listening to news and current events

Frequency of listening to music of any kind



How to Read: Each column represents a segment of news consumers based on their frequency of news consumption. The left-most column represents frequent news users ("several times a day"), and the right-most column represents non-news consumers ("rarely or never"). The percents listed vertically under each column represent the music listening frequencies for those news segments. For example, 50% of people who are non-news consumers listen to music "several times a day."



Attitudes on news and information

News avoidance is widespread

“The world has become so polarized that I don’t follow the news as much as I used to.

48%

Agree or strongly agree

22%

Neutral

30%

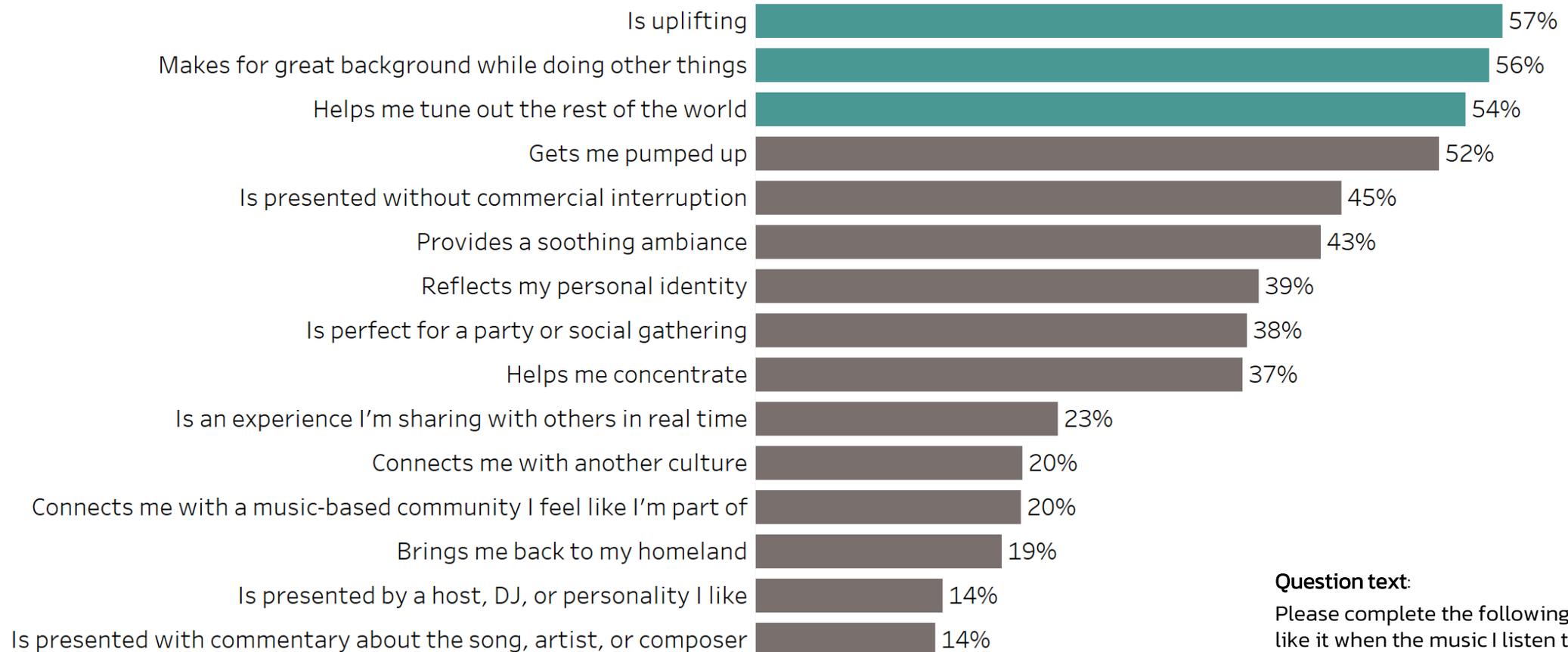
Disagree or strongly disagree

Segments from the general public that were even more likely to agree or strongly agree:

- **Gen-Zers** (54%) and **Millennials** (58%)
- **Hispanic / Latinos** (51%)
- **Rural** residents (54%)
- **Conservatives** (51%)



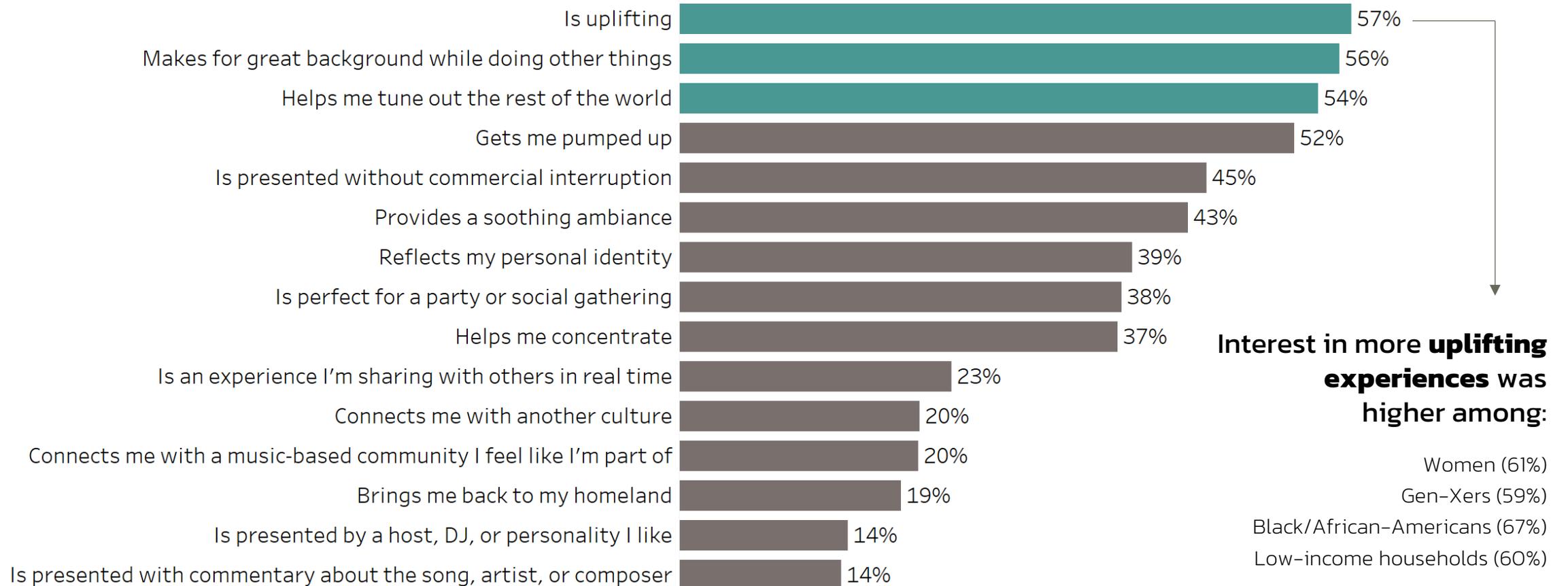
People are seeking music that is uplifting, a way to focus, and a soundtrack for their to-dos



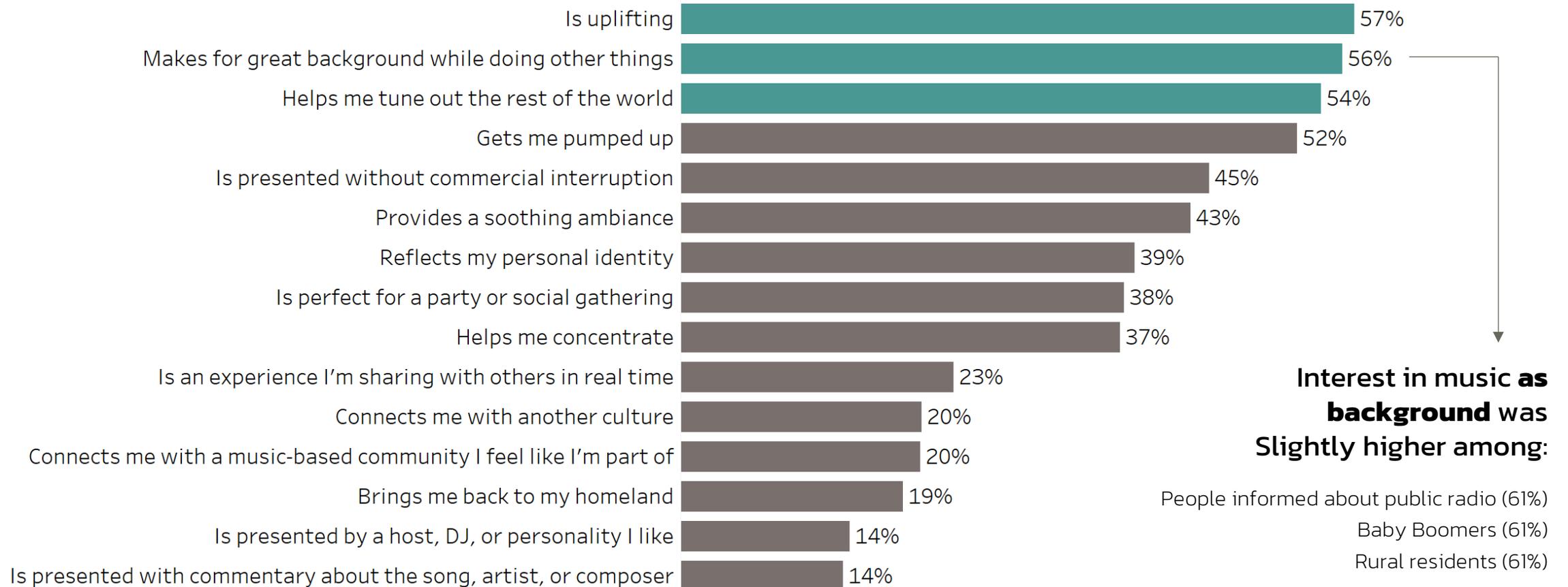
Question text:
Please complete the following sentence: "I like it when the music I listen to..."



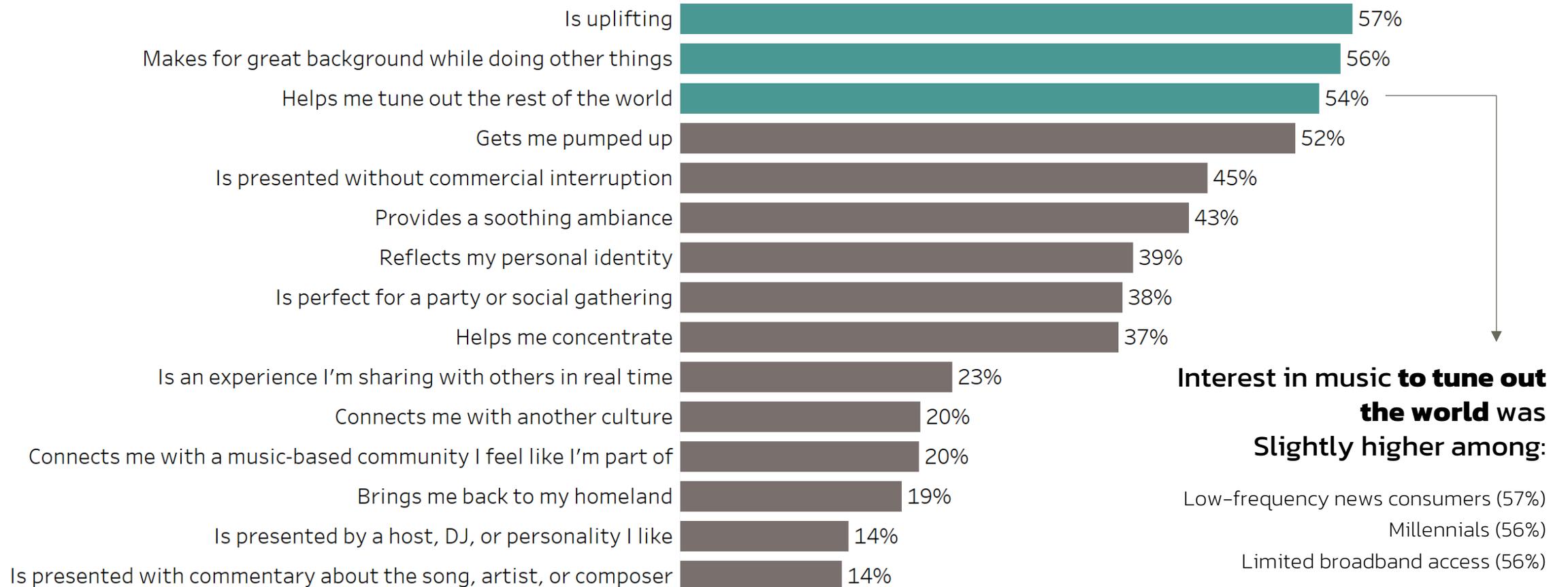
People are seeking music that is uplifting, a way to focus, and a soundtrack for their to-dos



People are seeking music that is uplifting, a way to focus, and a soundtrack for their to-dos



People are seeking music that is uplifting, a way to focus, and a soundtrack for their to-dos



“ It’s usually the background, I’ll have my headphones in when I’m getting ready or making dinner or going to the grocery store. **It’s sort of like a soundtrack**, not a distraction...I’m not usually fully focused on it.

Madeline, 33

General Public



“ If I’m working, it’s a background thing. When I used to work in a corporate environment, I would play music really loud **to tune everybody out**. And otherwise, I think it’s company.

Caroline, 52

Local Station Listener



“**I'm an anxious flyer**, and I have to fly a lot for work. So I'll listen to music at the airport just to, like, you know, **change my state** there. And it actually works really well. I'll put on something on YouTube. just [looking for something that will] go for five hours so I can fall asleep to it.

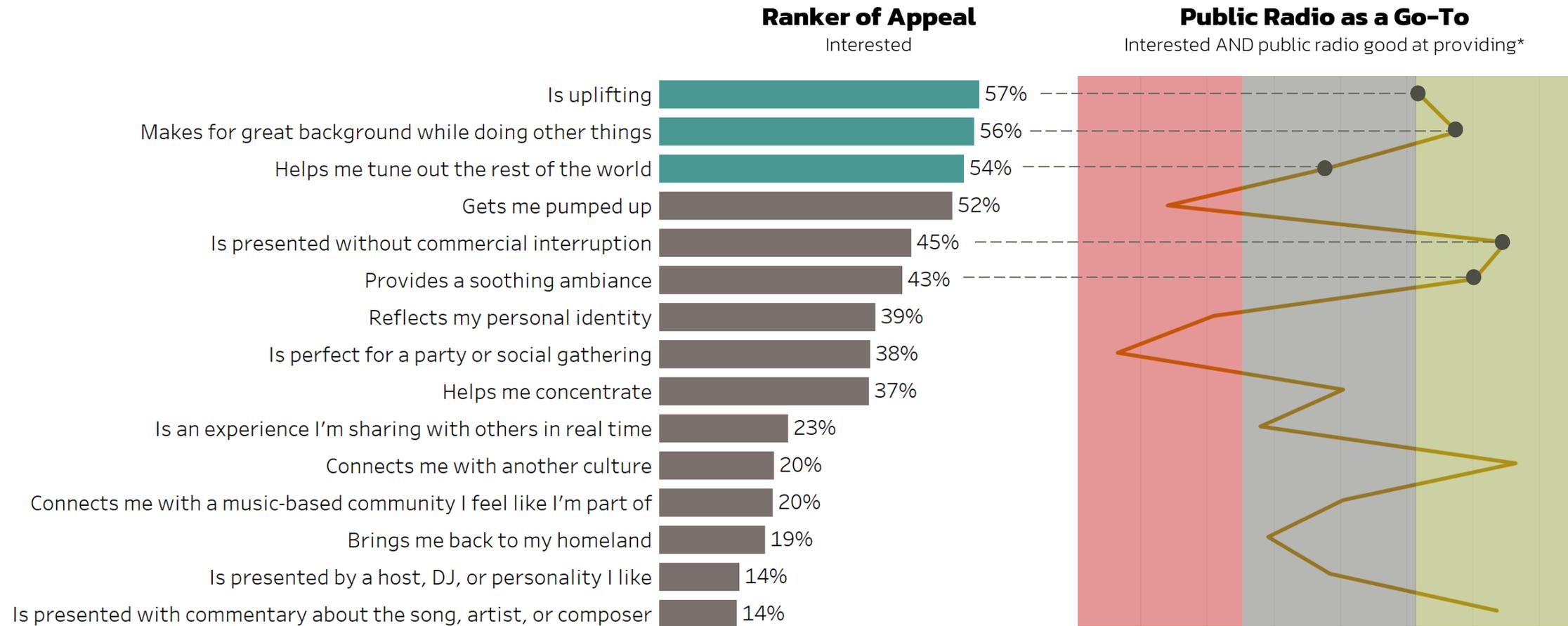
Ken, 54

General Public



Public radio a plausible go-to for uplift and a soundtrack to their lives

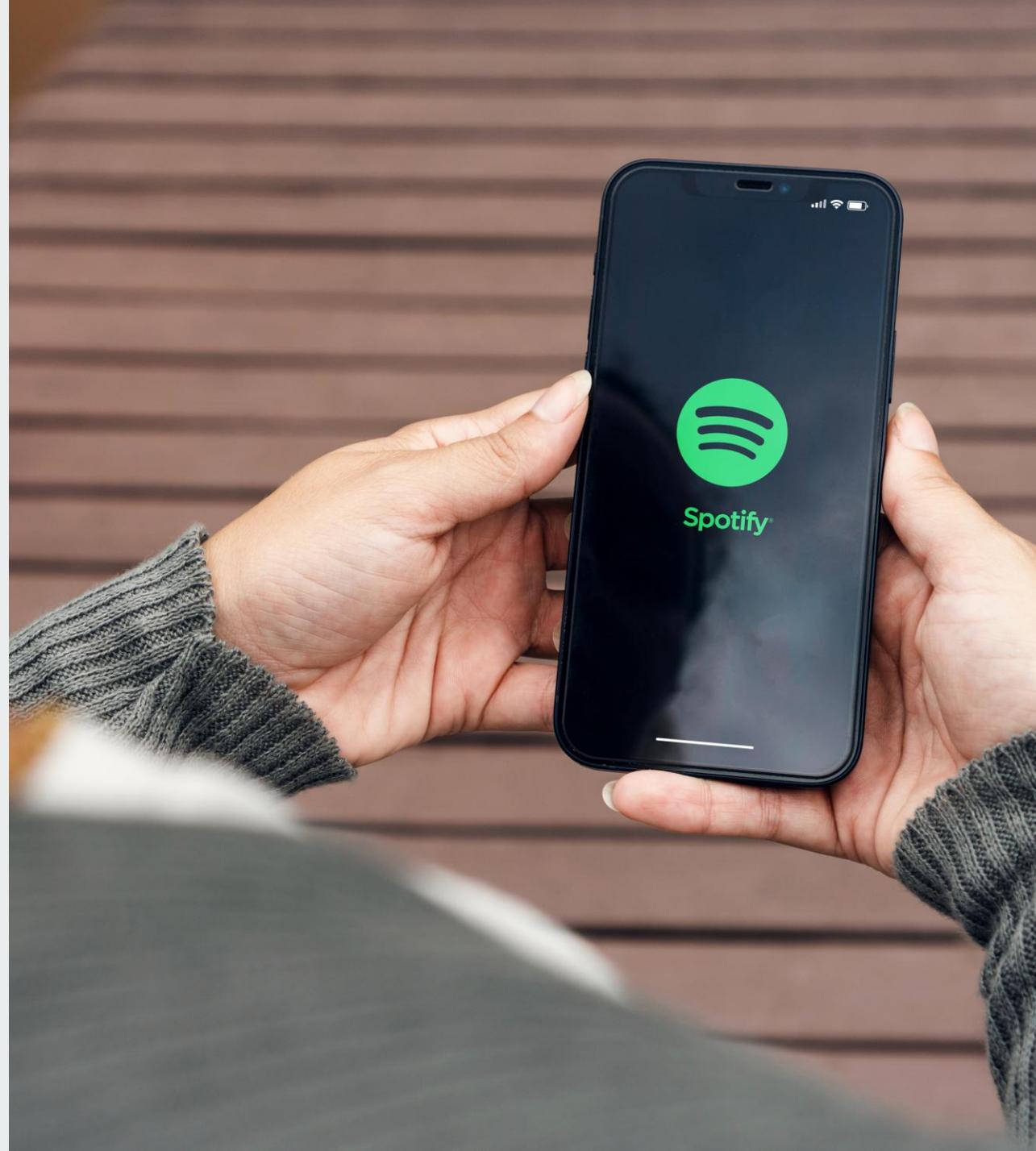
“Tuning out the rest of the world” not necessarily a strength



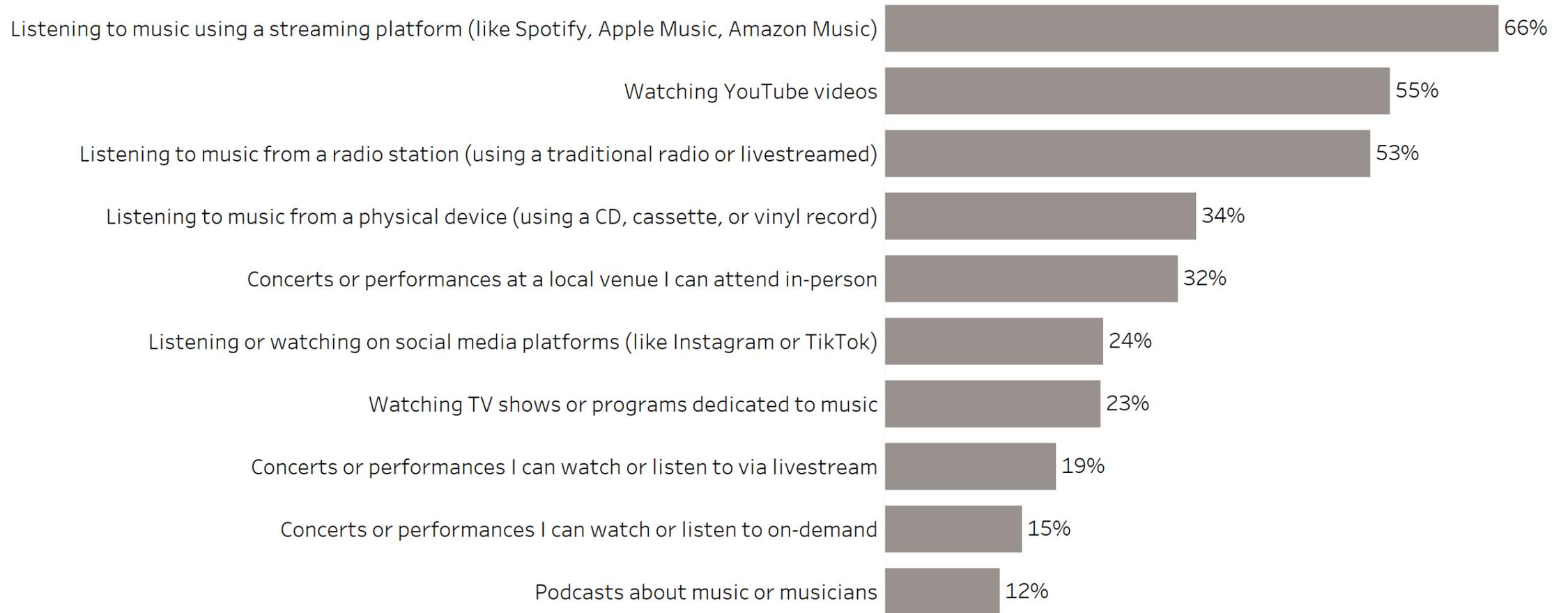
*Note: options only presented if selected as interested AND say there's not enough. Data filtered to include all respondents from the National sample and all local market general population samples identified as having "most" or "some" knowledge of public radio (n=7,456), based on open-text classification of responses to open-text question "What comes to mind when you hear 'public radio'".



The dominance of streaming



Preference for streaming platforms and YouTube stronger than for radio



Question text: How do you prefer to listen to music or music-related content? Select all that apply.



Methods for listening to music by generation

Radio usage for music correlates directly with age

	Gen Z	Millennial	Gen X	Baby Boomer
Listening to music using a streaming platform	79%	79%	68%	47%
Watching YouTube videos	56%	64%	59%	41%
Listening or watching on social media platforms	44%	34%	21%	7%
Listening to music from a radio station	29%	47%	58%	64%
Concerts or performances at a local venue I can attend in-person	27%	33%	32%	32%
Listening to music from a physical device	26%	30%	33%	41%
Watching TV shows or programs dedicated to music	17%	24%	23%	25%
Concerts or performances I can watch or listen to via livestream	15%	21%	20%	17%
Podcasts about music or musicians	13%	19%	13%	6%
Concerts or performances I can watch or listen to on-demand	10%	14%	16%	18%

Question text: How do you prefer to listen to music or music-related content? Select all that apply.



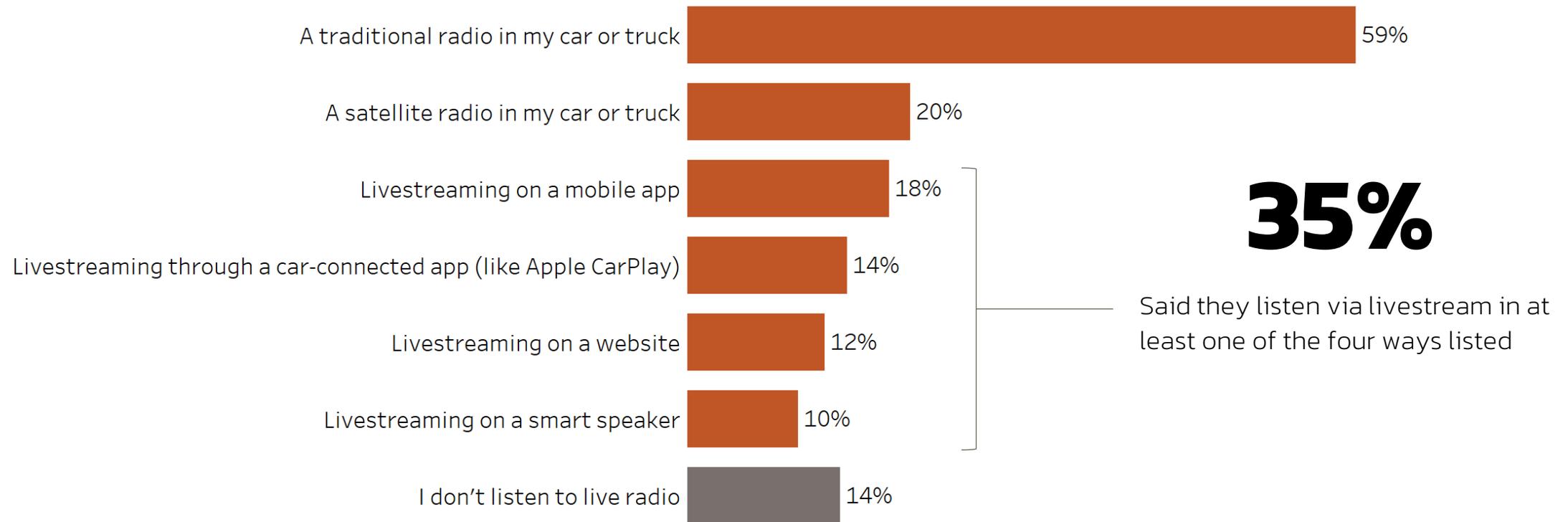
In Wisconsin, livestreaming contributes substantially to linear radio listening



Question text:

Radio stations are increasingly offering live streams on websites and apps. How do you most often listen to live radio?

Note: question only asked among respondents from the State of Wisconsin general public sample (n=506)



“ In the mornings, I tend to throw on **Apple Music** that has my name’s station, which is a daily playlist that refreshes every day. I’ve been using it for a couple months [after I switched from Spotify], so I feel like **the algorithm has tuned its taste** to what I find good.

Cyril, 24

General Public



“ Everyday when I drop my teen off at school, we listen to just the **Top 40 radio station**, we're big sing-along people. And then at the office, if I have a day when I'm doing a lot of typing or a lot of computer stuff, then I put on a **YouTube playlist**.

And then at home, when we are getting ready for dinner or when I'm doing laundry or anything, any kind of housework, we **ask Alexa** for a specific playlist...if my husband's cooking Italian, he puts on cheesy Italian restaurant music.

Isabel, 51

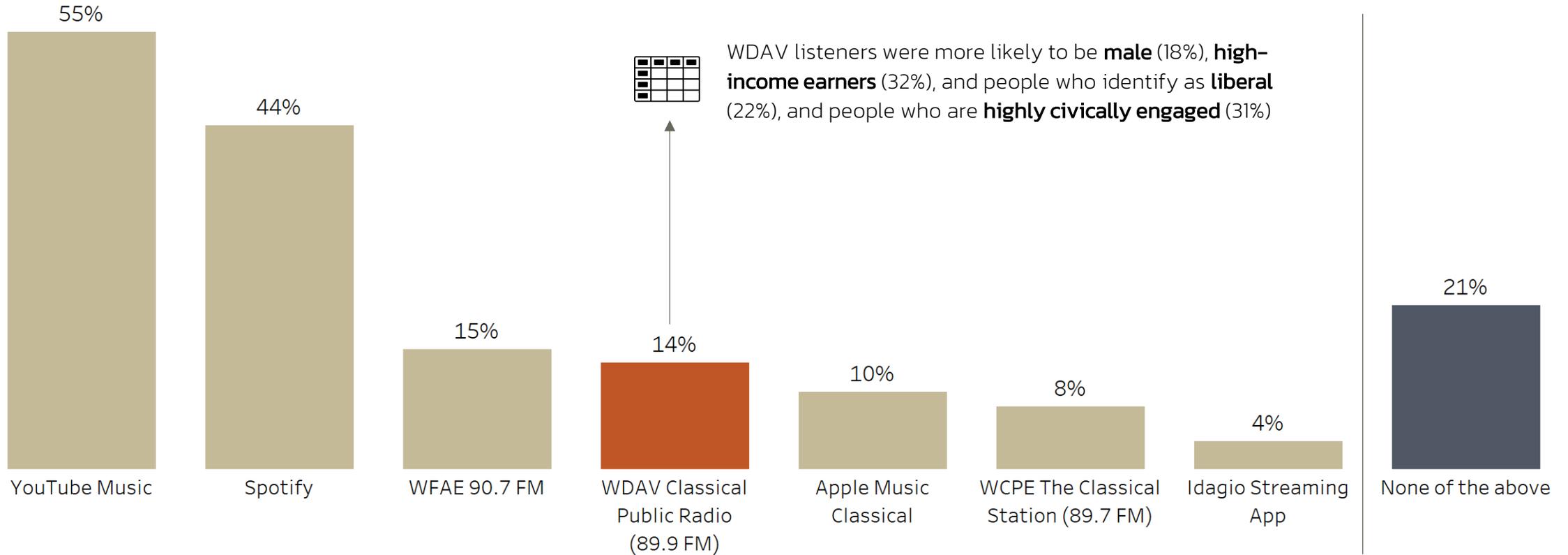
General Public



More evidence of YouTube's broad popularity for music

WDAV listeners have a distinct profile

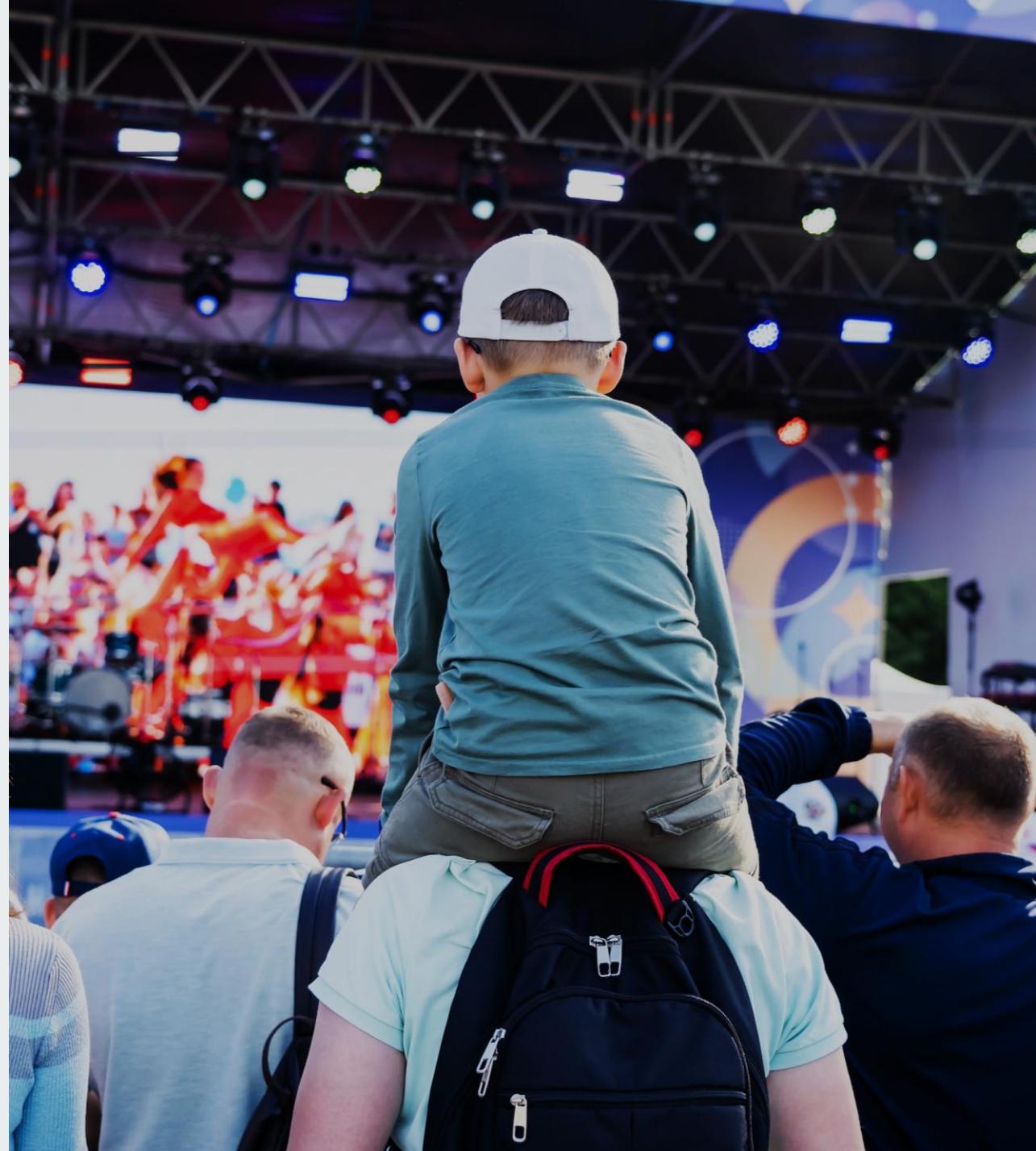
Custom Question

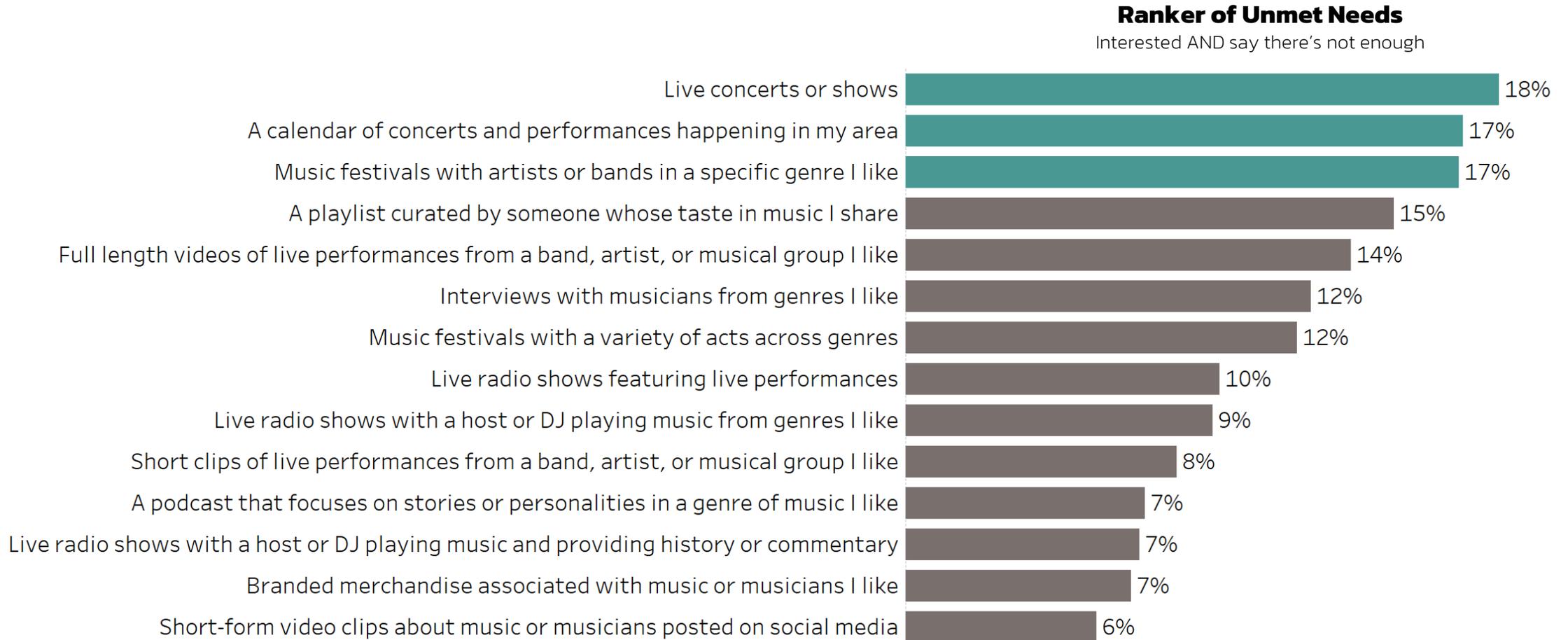
Question text: Below is a list of different sources or platforms for listening to music. Which of these have you used before?



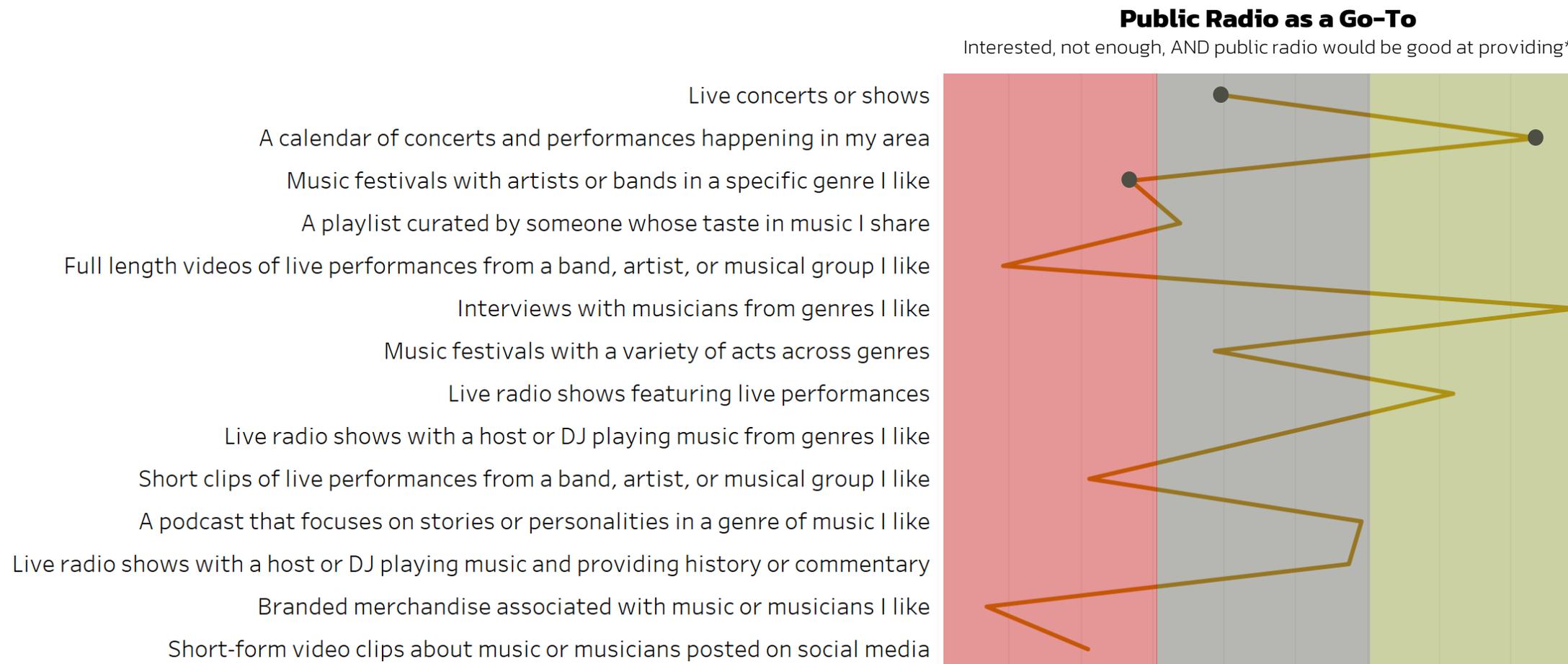
The need for in-person connection through music



The need for in-person connection is apparent in the music space, as live concerts & local calendars are the strongest unmet needs



Concert calendars already seen as a public radio strength—but not necessarily the case for live concerts



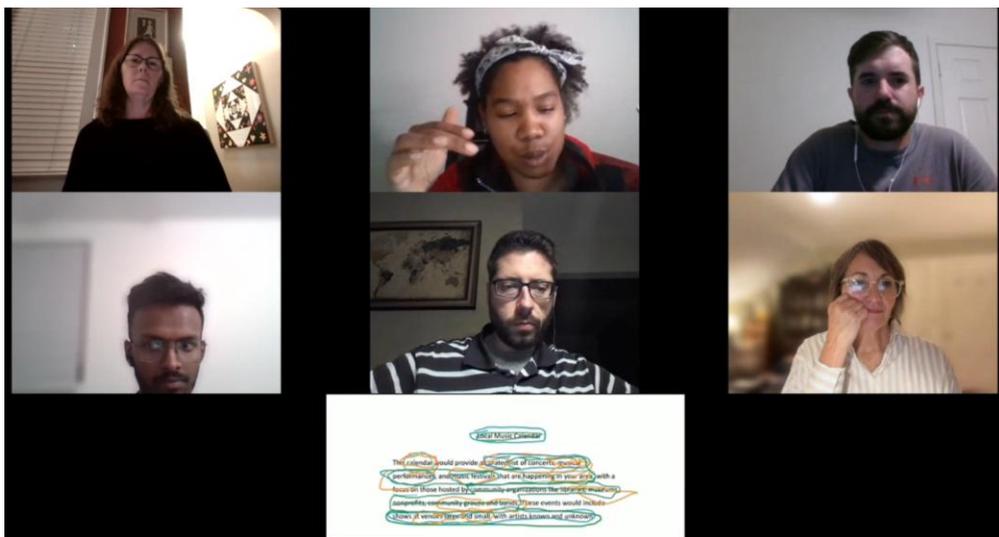
*Note: options only presented if selected as interested AND say there's not enough. Data filtered to include all respondents from the National sample and all local market general population samples identified as having "most" or "some" knowledge of public radio (n=7,456), based on open-text classification of responses to open-text question "What comes to mind when you hear 'public radio'".





Local Music Calendar

This calendar would provide a curated list of concerts, musical performances, festivals, and community events that are happening in your area, with a focus on those hosted by community organizations like libraries, museums, nonprofits, community groups and bands. These events would include shows at venues large and small, with artists known and unknown.



“

I like that its curated, I would probably be **more likely to pay attention to an event that was promoted by public radio**, I'd at least give it a shot.

Kip, 64, Local Station Listener

“

I think it would be good on email because...you might be at work on a Thursday or Friday, and you see it pop up and, like, oh, let's go do this this weekend. This person's coming. **But you're not even thinking about that if it doesn't come up on your email.**

Jenny, 44, General Public

“

For me, I think it's more like, **community cultivating**. I would say that, it just depends on the venue and what type of genre or bands or, you know, artists they're pushing through there. But, ultimately, I will always wanna see people around the community.

Gavin, 33, General Public

“

I actually like that idea of creating a calendar that's like a curated list of upcoming events, because [I get] so sucked up in the pop culture sometimes, **I have a hard time figuring out what artist is coming to my city**, or coming to a city near me. I think this would be actually be a really good idea.

Randal, 24, General Public





Great Music Lives Here®

Listener-Supported Music

☰ NAVIGATE

@ SIGN IN

∨ WAYS TO GIVE



DONATE NOW

The Gig List

CHECK OUT UPCOMING EVENTS

🔍 Search for upcoming events

JUN 16

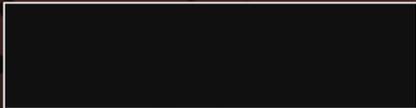


The Gig List for June 16: Roe Family Singers; Will Wood; Janis Siegel

Monday, June 16, 2025 · 12:00 PM

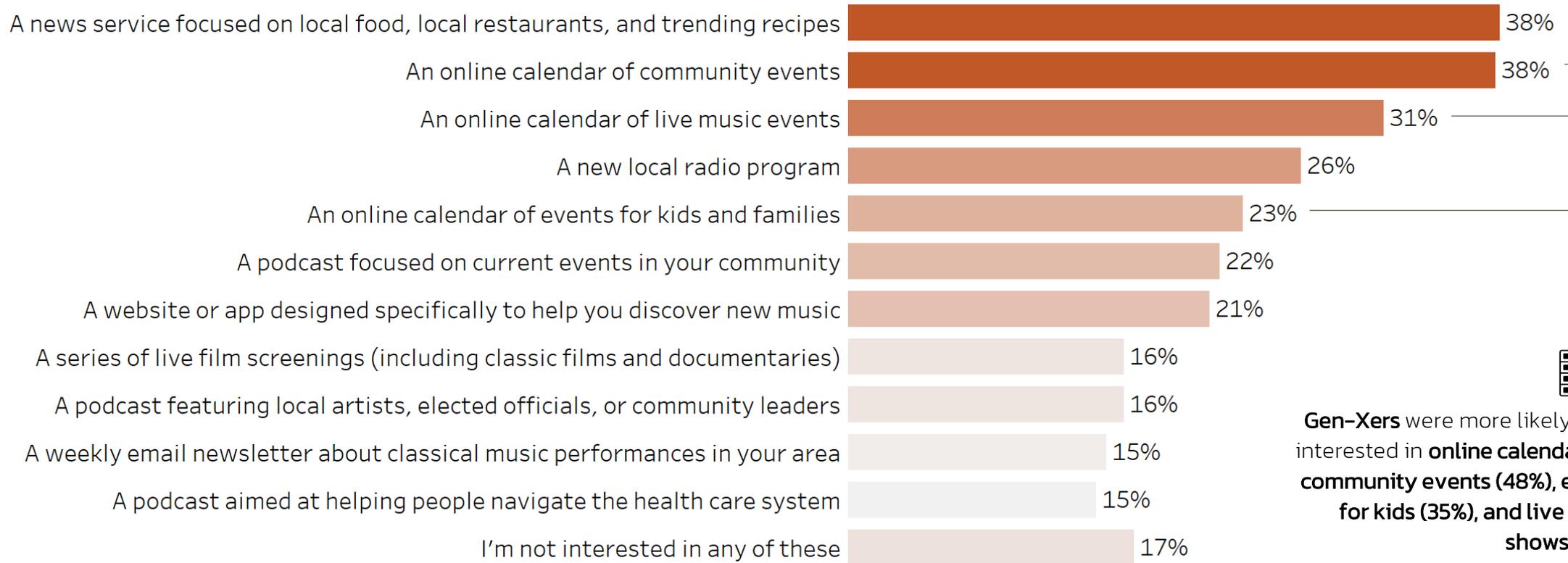
MORE INFORMATION

Upcoming Local Events



📅 FILTER EVENTS BY DATE

In Jacksonville, event calendars just as popular as coverage of the local food scene



Gen-Xers were more likely to be interested in **online calendars for community events (48%), events for kids (35%), and live music shows (38%)**

Question text: Below is a list of services or offerings that could be made available to you as a resident of the Jacksonville area and First Coast region. Which of the following would you be interested in? Select all that apply.



Insights beyond RUN

“Struggling Small Music Venues Battle Inflation for Affordable Prices”

BloomNews, November 23rd 2023

“Everything from basic supplies like beer and ice to essential insurance has become notably more expensive. Frank emphasized the limitations faced by these venues, lacking corporate safety nets and relying on limited resources.

The inflation-induced increase in overhead costs compounds the plight of these smaller venues. While larger establishments might absorb these hikes more quickly due to their scale and resources, **independent venues are facing a significant squeeze on their already tight margins.**”

Insights beyond RUN

'A death sentence for music': the battle for America's last Live Nation-free city

The Guardian, June 30th 2024

"Over the past several months, Live Nation has made significant inroads toward its first Portland conquest. It appears poised to operate a proposed 3,500-capacity venue, planned for a long-vacant site across the Willamette River from Portland's downtown.

'[It] would be a death sentence for the music scene,' says Colescott Rubin, a jazz bassist who got his start busking on streets and booking shows in Portland as a teen.

The arrival of Live Nation, he and others in the city's music scene fear, would send Portland the way of cities such as Austin and Boston, where independent venues have shuttered and local journalists and musicians have lamented the corporatization of scenes that once felt organic and unstoppable."

Interest in local live music is especially strong among specific populations

“
I’m always on the lookout for local concerts or live music in my area.

47%

Agree or strongly agree

25%

Neutral

28%

Disagree or strongly disagree

Segments from the general public that were even more likely to agree or strongly agree:

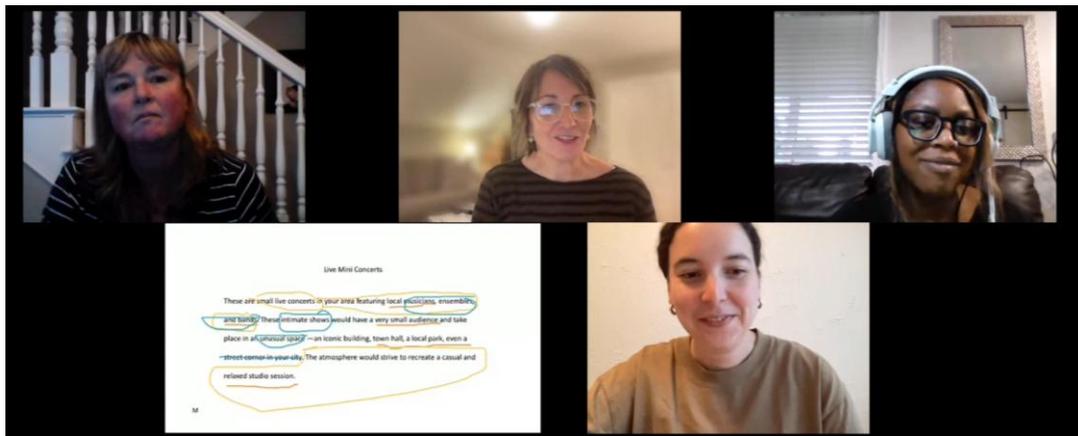
- **Parents of young kids** (59%)
- **Millennials** (57%)
- People **born and raised** in their state of residence (51%)





Live Mini Concerts

These are small live concerts in your area featuring local musicians, ensembles, and bands. These intimate shows would have a very small audience and take place in an unusual space —an iconic building, the town hall, a private garden, etc. —before an audience of fewer than 50 people. The atmosphere would strive to recreate a casual and relaxed studio session.



“

Let's say I was able to get a ticket to this, and its known to be a small intimate setting...I would use this as **a date night idea**, take my partner to spend an evening doing this

Cyril, 24, General Public

“

In my town, we have local bands play in a park by the water and it gets pretty popular...**it's really nice to see like, "wow our town has these great musicians"**...it'd be really cool to have more of that around the community

Kiana, 39, General Public

“

One of the reasons I like **Tiny Desks** so much is that I'm always very jealous of the people in the background.

Stu, 61, Local Station Listener

“

I'm geeked up about the unusual space...our city does that, three times a year when spaces that aren't normally open to the public have a kind of open doors day, and people flock. As long as the acoustics are good, it could be a real draw.

Connie, 58, Local Station Listener







**Own the local
music scene**





Radio seen as a good source for music discovery

“Local radio can be a valuable source for discovering new music or emerging artists.

62%

Agree or strongly agree

24%

Neutral

14%

Disagree or strongly disagree

Segments from the general public that were even more likely to agree or strongly agree:

- **Gen-Xers** (68%)
- **Black/African Americans** (66%)
- **Affluent households** (66%)
- **Urban residents** (65%)
- People able to **recall a local public radio station** top-of-mind (68%)



Some segment-based differences: **Genre interest**

“ I love learning new facts and stories about my favorite music or artists.

65%

Agree or strongly agree

23%

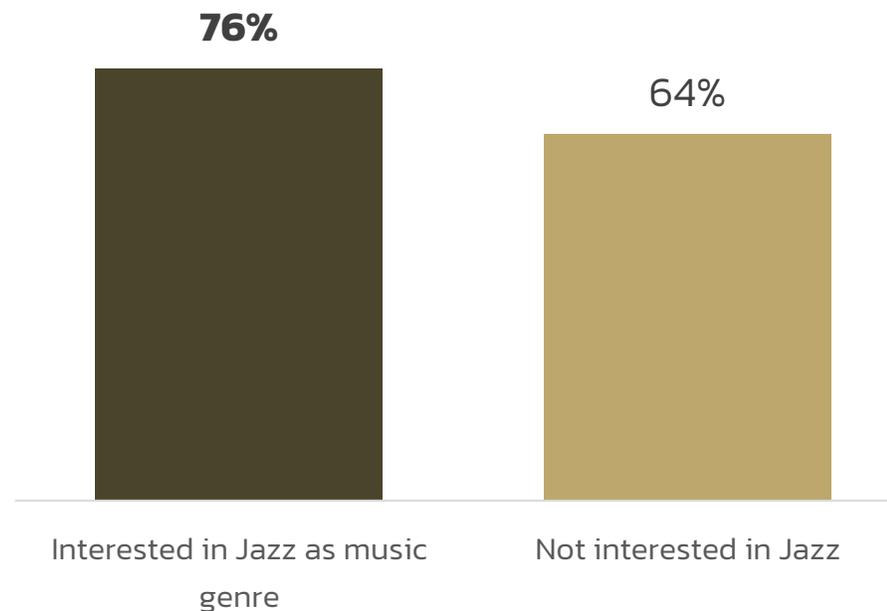
Neutral

12%

Disagree or strongly disagree

Top 2 agreement

% agree or strongly agree



Behind the Local Music

This documentary series would include stories and discussions that focus on the musical history of your town, city, or region. It could focus on genres that have roots in the area, the history of local venues, prominent figures in musical history, etc. A local host would present the topic and interview people from the community for a considered and thoughtful exploration of musical history.



“

I love documentaries...and coming from **Boston**, this we have such a mix of genre with rock and roll, you know, Aerosmith and R&B and New Kids On The Block...I would like to find out stuff possibly that I don't know.

Kari, 56, General Public

“

The most successful musician to come out of **Fayetteville**, I'd say is J Cole...he's like the most breakthrough artist to come from Fayetteville. So to see a documentary about other musicians that have been trying to reach that type of success as well, it'd be pretty interesting.

Randall, 24, General Public

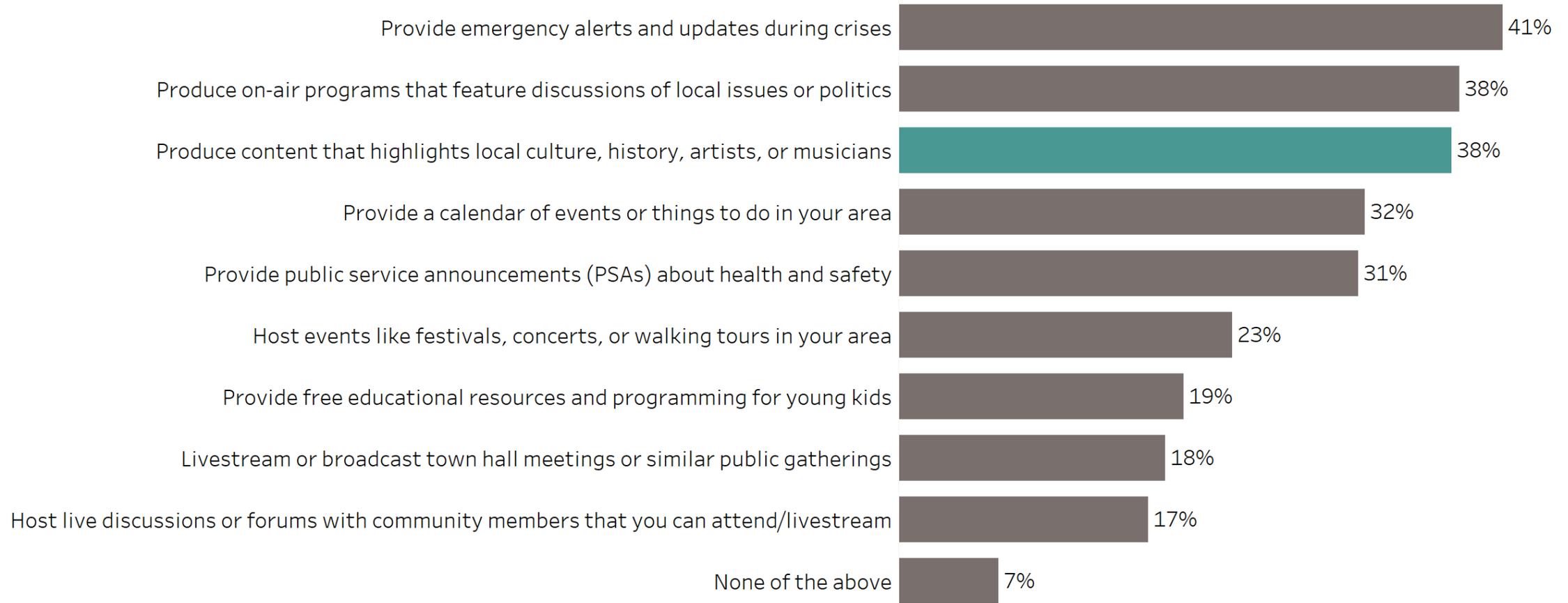
“

I live just outside **Kansas City**, and there's a lot of jazz around here. And it would be interesting to have a deeper connection or knowledge of exactly what kind of jazz started here and, the people who helped make it.

John, 49, Local Station Listener



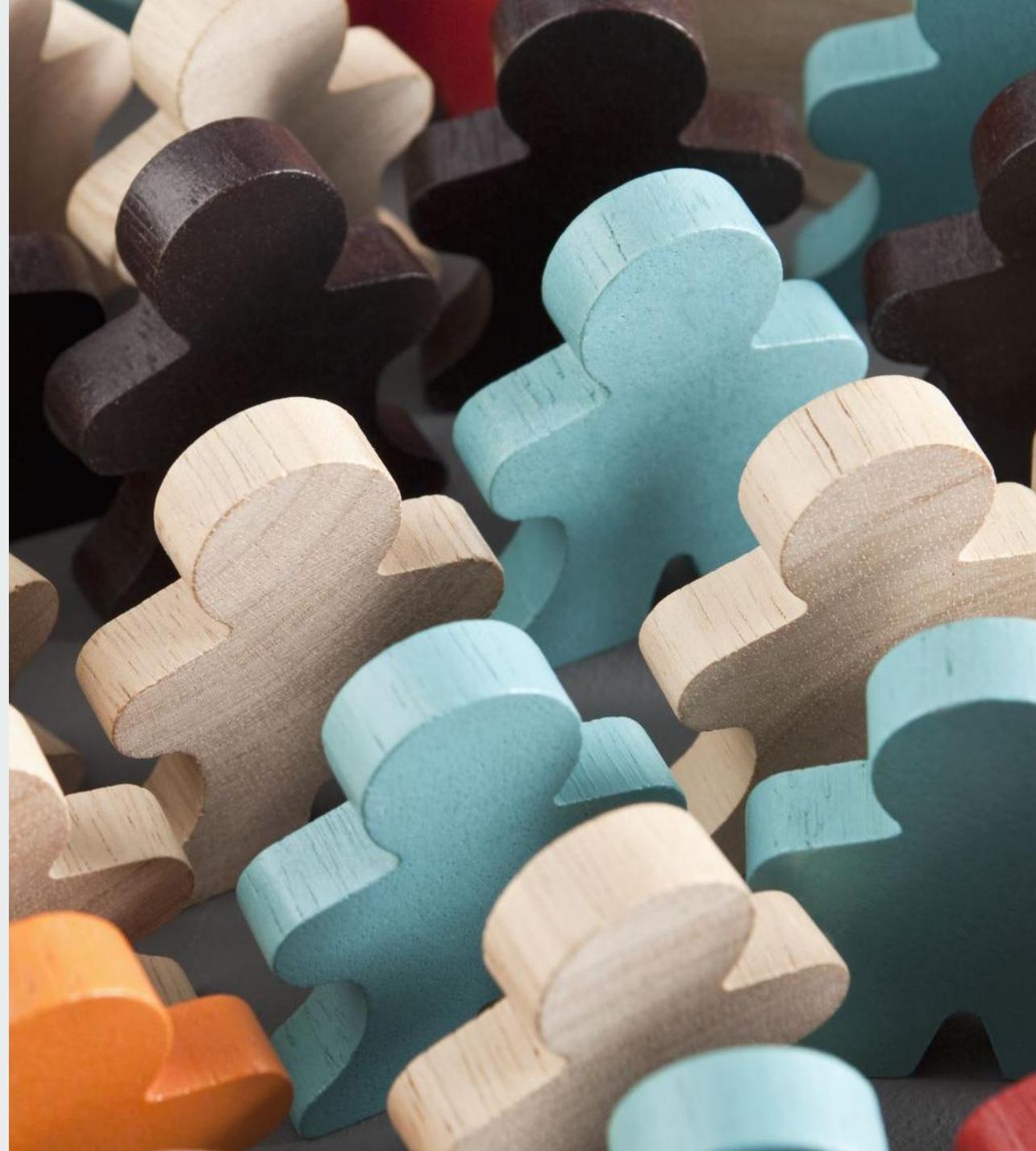
Those who know public radio value content that showcases local musicians



Note: Data filtered to include all respondents from the National sample identified as having "most" or "some" knowledge of public radio (n=3,151), based on open-text classification of responses to open-text question "What comes to mind when you hear 'public radio'".



**Expand your
genre palette**



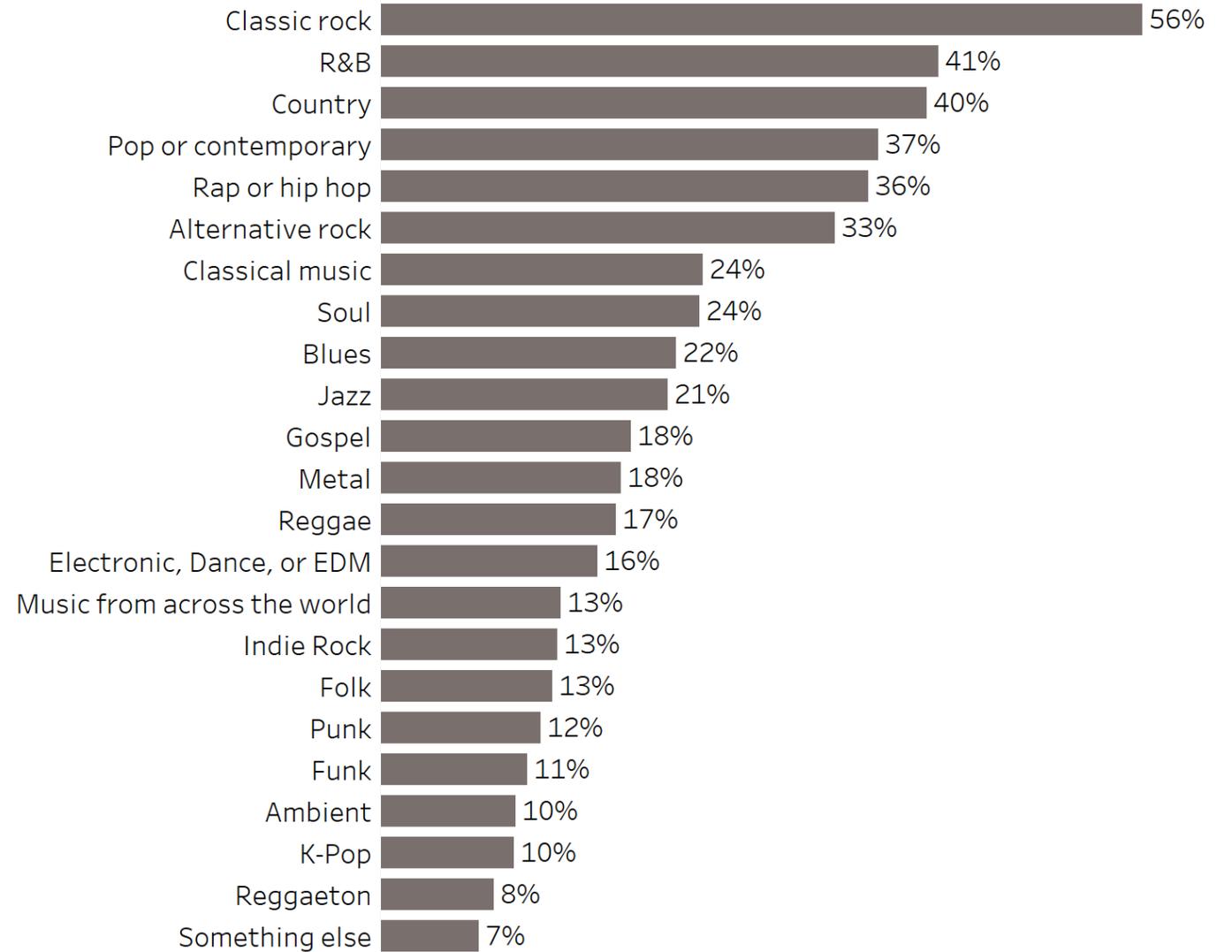
Music genres

Classic rock the most popular genre nationally

Question text

Below is a list of music genres. Which of these do you typically enjoy listening to? Select all that apply. Or if there's a genre you like that's not included in this list, please share below.

Note: Perceived availability was not asked as a follow-up to interest in music genres.



Music genres

In many but not all genres, there are clear generational differences

Question text

Below is a list of music genres. Which of these do you typically enjoy listening to? Select all that apply. Or if there's a genre you like that's not included in this list, please share below.

Note: Perceived availability was not asked as a follow-up to interest in music genres.

	Gen Z	Millennial	Gen X	Baby Boomer
Rap or hip hop	57%	56%	35%	8%
R&B	47%	51%	40%	29%
Pop or contemporary	41%	40%	38%	30%
Classic rock	39%	49%	62%	65%
Country	37%	43%	39%	40%
Alternative rock	37%	44%	38%	18%
Electronic, Dance, or EDM	23%	24%	15%	5%
Indie Rock	22%	17%	12%	6%
Metal	20%	21%	24%	8%
Soul	18%	23%	25%	25%
Classical music	18%	25%	22%	26%
Punk	16%	18%	11%	4%
Music from across the world	16%	17%	13%	10%
Blues	15%	22%	22%	24%
K-Pop	15%	15%	9%	3%
Jazz	14%	21%	20%	25%
Reggae	13%	22%	20%	12%
Gospel	13%	19%	20%	19%
Folk	12%	13%	10%	15%
Ambient	12%	14%	9%	6%
Reggaeton	12%	14%	8%	2%
Funk	11%	13%	12%	8%
Something else	5%	4%	7%	11%



Music genres

Musical tastes vary markedly by region

	National	Atlanta	Charlotte	Cleveland	Colorado	Jacksonville	Michigan	Milwaukee	Minnesota	Nebraska	New York City	OKC and Tulsa	Philadelphia	Pittsburgh	Central Virginia	St. Louis	Tampa Bay	Utah	Washington DC	Wisconsin
Classic rock	56%	49%	51%	63%	62%	53%	60%	54%	60%	63%	49%	59%	57%	63%	55%	59%	54%	63%	51%	62%
Country	40%	38%	44%	42%	42%	43%	42%	41%	44%	51%	31%	53%	32%	46%	39%	43%	39%	47%	33%	49%
Pop or contemporary	37%	30%	38%	44%	43%	29%	37%	36%	42%	39%	37%	39%	42%	36%	34%	41%	36%	43%	37%	39%
R&B	41%	46%	39%	40%	35%	43%	38%	36%	31%	27%	47%	34%	43%	41%	49%	34%	38%	27%	41%	27%
Alternative Rock	33%	28%	29%	34%	41%	27%	33%	32%	36%	33%	25%	33%	33%	34%	29%	31%	28%	44%	30%	34%
Rap or hip hop	36%	37%	36%	34%	33%	33%	33%	34%	26%	30%	38%	30%	35%	33%	42%	29%	29%	32%	37%	24%
Gospel	18%	31%	26%	20%	11%	26%	17%	17%	13%	15%	22%	23%	16%	13%	25%	18%	20%	14%	20%	15%
Classical music	24%	22%	18%	23%	24%	23%	22%	22%	19%	24%	30%	21%	21%	17%	22%	21%	25%	30%	29%	21%
Metal	18%	14%	15%	20%	18%	16%	22%	20%	17%	20%	11%	19%	17%	22%	17%	15%	15%	23%	15%	18%
Blues	22%	24%	17%	19%	22%	22%	20%	18%	21%	18%	24%	18%	17%	17%	17%	20%	21%	17%	18%	19%
Soul	24%	30%	23%	25%	18%	27%	19%	18%	14%	14%	31%	18%	24%	22%	31%	22%	22%	12%	26%	16%
Jazz	21%	26%	21%	23%	20%	26%	20%	19%	15%	17%	28%	16%	20%	19%	20%	19%	21%	16%	25%	15%
Folk	13%	13%	11%	13%	15%	12%	13%	15%	12%	15%	13%	13%	13%	12%	12%	12%	11%	21%	12%	18%
Electronic, Dance, or EDM	16%	14%	14%	14%	22%	16%	14%	15%	16%	15%	18%	13%	14%	11%	17%	11%	15%	17%	18%	11%
Indie Rock	13%	12%	9%	12%	19%	11%	11%	12%	12%	16%	11%	11%	11%	12%	13%	11%	11%	19%	14%	14%
Punk	12%	11%	9%	10%	12%	12%	11%	10%	10%	14%	9%	10%	12%	11%	10%	11%	8%	15%	9%	11%
Ambient	10%	10%	9%	9%	13%	11%	10%	10%	7%	9%	11%	10%	9%	6%	10%	7%	11%	13%	11%	9%
Reggae	17%	17%	16%	17%	15%	22%	12%	13%	11%	11%	28%	10%	19%	13%	20%	12%	18%	14%	21%	10%
Music from across the world	13%	14%	9%	10%	13%	14%	10%	11%	9%	13%	17%	10%	10%	10%	13%	10%	14%	15%	15%	10%
K-Pop	10%	9%	9%	7%	7%	8%	7%	8%	8%	8%	14%	10%	10%	10%	8%	8%	8%	11%	9%	5%
Funk	11%	12%	13%	12%	10%	11%	12%	10%	7%	10%	11%	9%	9%	10%	13%	10%	10%	10%	14%	9%
Reggaeton	8%	9%	8%	5%	7%	10%	4%	7%	5%	6%	13%	6%	9%	3%	7%	4%	10%	7%	11%	4%



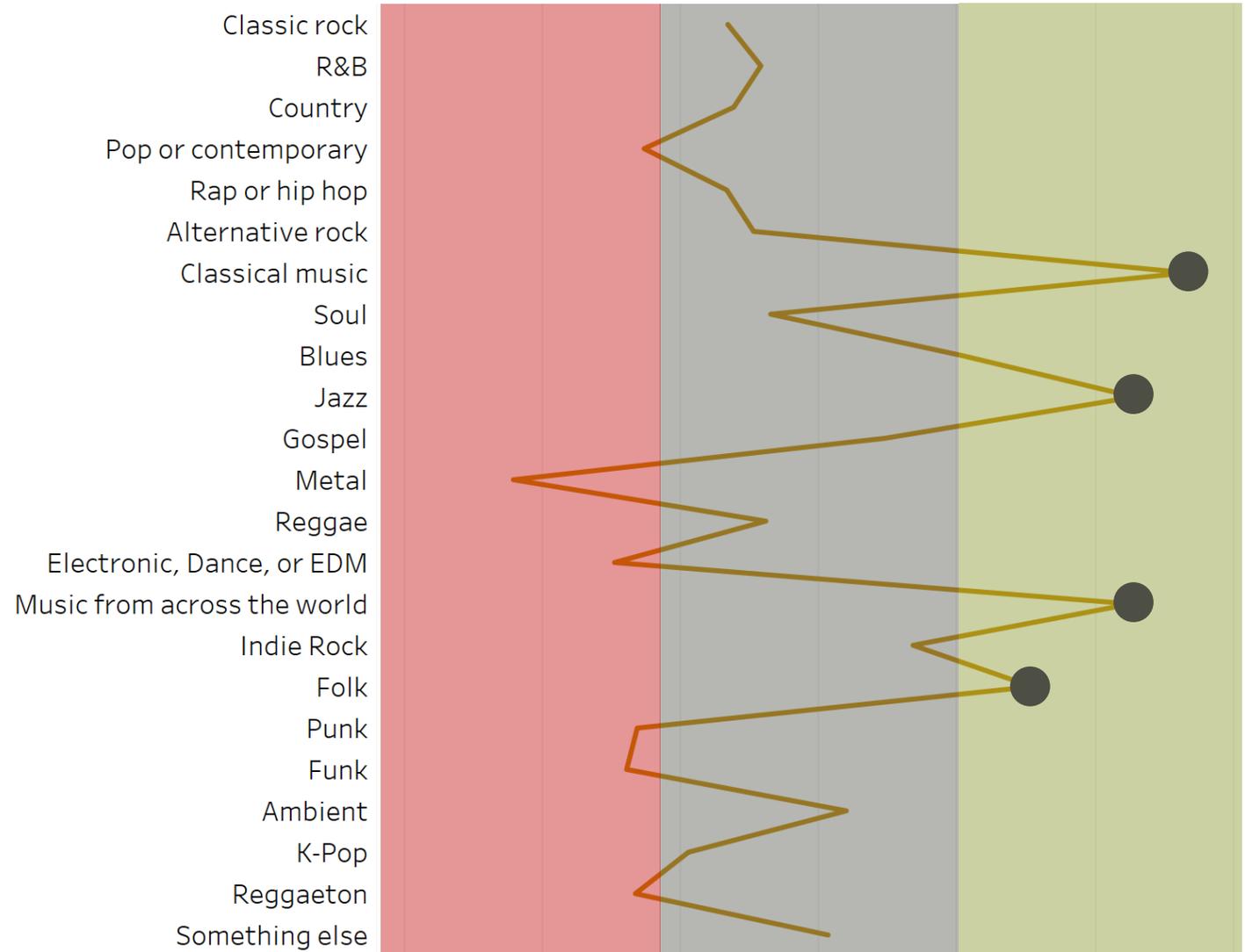
Music genres

Perceptions of public radio "fit" for the specific genres they're interested in

*Note: options only presented if selected as interested AND say there's not enough. Data filtered to include all respondents from the National sample and all local market general population samples identified as having "most" or "some" knowledge of public radio (n=7,456), based on open-text classification of responses to open-text question "What comes to mind when you hear 'public radio'".

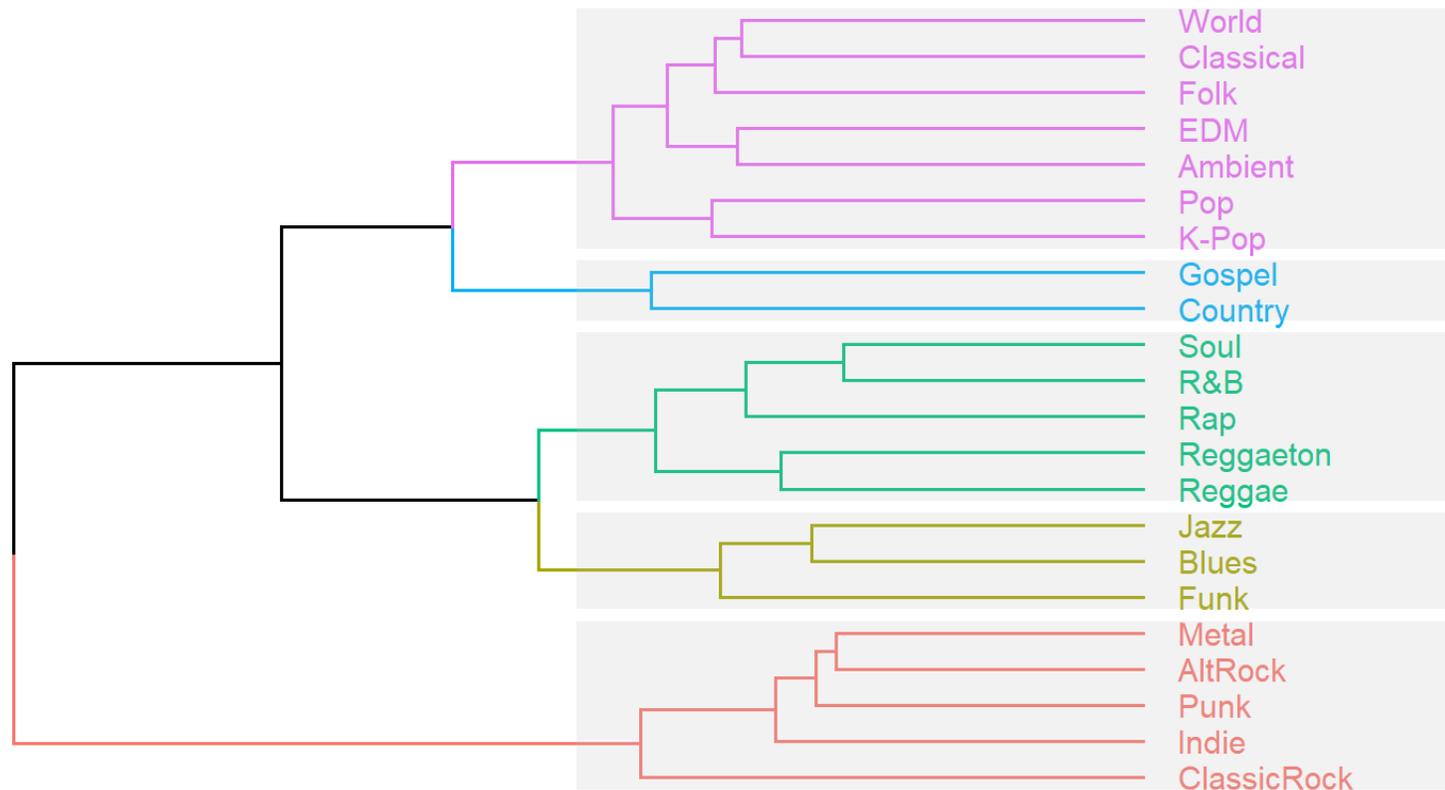
Public Radio as a Go-To

Interested, AND public radio would be good at providing*



Music genres

Clustered preferences reveal potential directions for expansion



Five clusters emerged from a hierarchical cluster analysis of the genre interest data, representing natural affinities and related interests in specific genres.

This can serve as a resource for considering which “tangential” genres you can begin incorporating into your content strategy, by nature of the likelihood that people who like one of these genres are also likely to enjoy the others.

How to Read: On average, people interested in **Jazz** are also *very likely* to listen to **Blues** and **Funk**. People who like **Classical** are *more likely* to enjoy **Folk** than **Indie**.

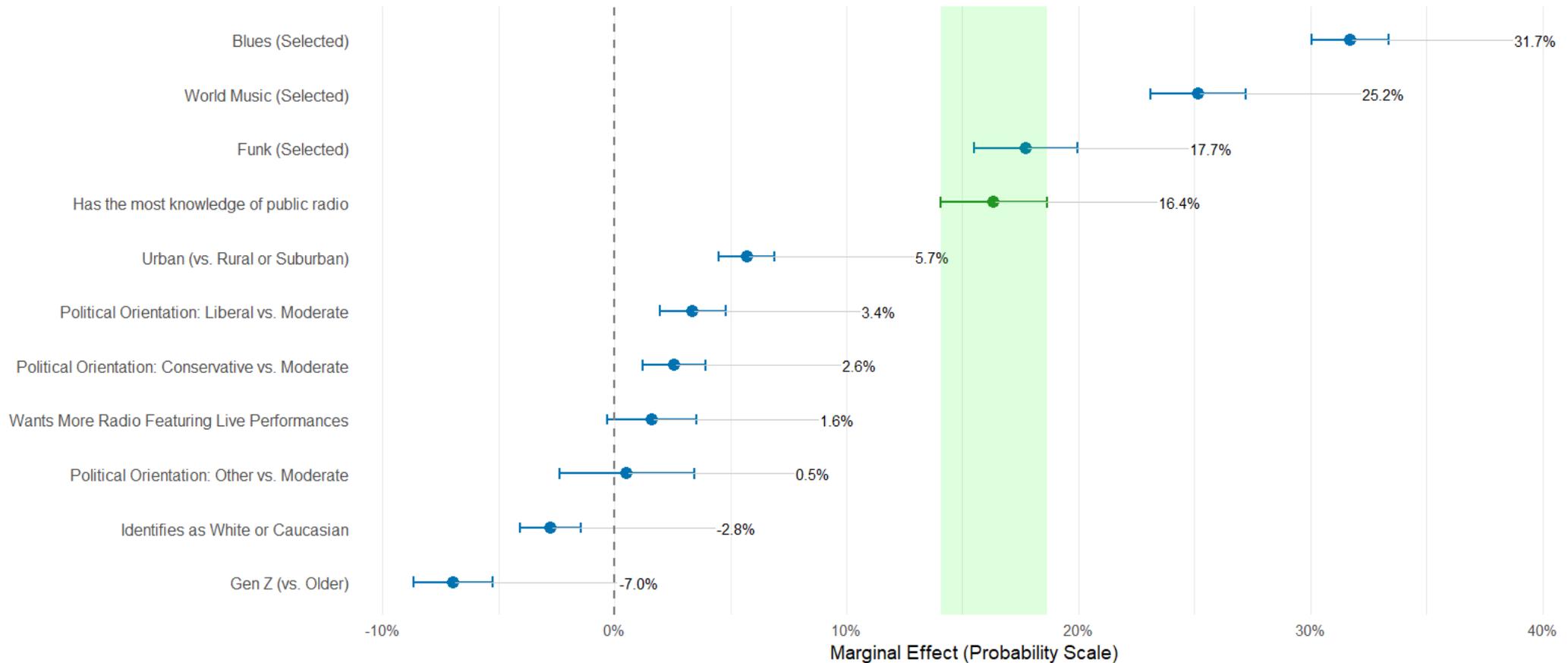
Vertical lines show where two genres (or clusters of genres) are grouped based on similarity in listener preference. Genres joined further to the right > are more likely to be enjoyed together, while those grouped further to the < left are less commonly preferred together.



Music genres

Jazz and Classical have specific genre “neighbors,” but don’t necessarily predict other audience attributes

Average Marginal Effects on Classical or Jazz Preference
Effect on predicted probability (with 95% CI)



Insights beyond RUN

How classical radio can rethink, experiment, and evolve to develop deeper relationships with listeners of color

Classical KING, WQXR, WRTI, KUCO, in partnership with Slover Linett, 2023



Three “new lenses” from the study:

1. People of **all races and ethnicities** listen to classical music.
2. Most people listen to classical as part of a **broader musical landscape**. Classical listeners have a wide range of genres in their ears.
3. There is **little agreement on what constitutes “classical music,”** and many people define that term narrowly.

Insights beyond RUN

How classical radio can rethink, experiment, and evolve to develop deeper relationships with listeners of color

Classical KING, WQXR, WRTI, KUCO, in partnership with Slover Linett, 2023



Five directions for change & innovation:

1. Bring classical music **to where people are**
2. Highlight classical music's **modern evolution** beyond its European origins
3. Highlight classical music's relevance by emphasizing its **contemporary** connections
4. Break **away from traditional radio format** to connect with younger and more diverse audiences
5. Align with people's habit of "**mood setting**"



One in five gravitate toward the concept of NoteWorthy, as an example of expanding people's experience of "Classical"



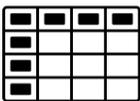
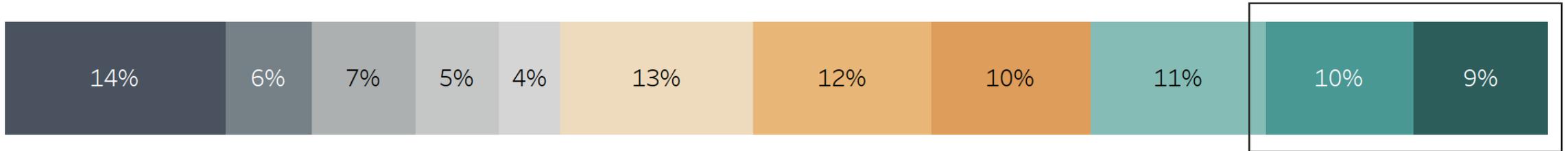
Question text:

NoteWorthy is a series of initiatives led by WDAV Classical Public Radio to spotlight classical music by women, composers of color, and under-represented groups in its programming.

Using the scale below, how interested are you in any kind of content or event focused on this?

1 – Not at all interested

10 – Very interested



This concept was especially appealing (Top 2 rating) among **classical music fans** (37%), **millennials** (28%), and **liberals** (28%)

Women (19%) and **Black/African-American** residents (20%) expressed a similar level of interest as the total population



Parting takeaways

- Leverage your role as a community organization to **own the local music scene**—tell stories, help people discover, and bring locals together at live shows
- Find ways to deliver your content on **non-owned digital platforms** to better align with people’s preferences for self-curation and algorithmically-driven recommendations
- Find opportunities to **expand your genre palette** with cross-over performances and programming
- **Adopt language** that mirrors the reasons why people most often listen to the music they love: as refuge from the world, and as background to their daily routines
- Overall, build an audience development strategy that’s conceived around **building communities**, not just audiences

Questions?



Access the RUN dashboard!

Inform your strategies
and investments with the
actual data

For access, contact

rundashboard@citysquareassociates.com

Coming Up Next



News

Content and Audience Development
in the News Space

Webinar: Monday, June 23

Workshop: Wednesday, June 25



Special Guests:

Ashley Alvarado, TPR

Megan Garvey, LAist

Rachel Estabrook, CPR

Kevin Dale, CPR

David McGowan, WJCT

ABOUT US

City Square Associates

402 Cambridge Street | Cambridge, MA 02141 | 617-441-7733

info@citysquareassociates.com

City Square Associates is a marketing research and strategic consulting practice that utilizes a variety of qualitative and quantitative research methodologies to obtain and apply consumer insight.

For twenty-five years we've partnered with a broad range of clients, including major media companies, renowned educational and cultural institutions, leaders in the medical and life sciences field, as well as non-profits and community-based organizations.

In all that we do, we endeavor to transform data into meaning and meaning into action



CITY SQUARE
ASSOCIATES
Data. Meaning. Action.