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The Fallacy Of Radio Station P1s

by **Fred Jacobs** · May 3, 2023



Radio professionals used to spend a lot of time discussing listener loyalty. What does it take to make a listener actually feel a connection, a sense of loyalty to a station?

In the BI years – before the Internet – the task wasn't so daunting. You just had to vanquish the other stations in your market, a winnable task in most



situations.

But thanks to the “long tail” of media competition, radio now competes with digital streaming platforms, podcasts, satellite radio, YouTube, gaming, and myriad other viable choices any audience member can make at the push of a button, the swipe of a screen, or by opening an app.

Today, loyalty is a more transient quality, seemingly out of reach for today's radio stations. And that brings to mind the old saw from inspirational speaker, Grant Fairly:

“If you want loyalty, get a dog.”

Still radio programmers persevere. Most have always been obsessed with P1s. If you don't work in radio, you may not know what the definition of a P1 is.



Actually, it's very simple, finite, and data-driven. Ratings companies define P1s as listeners who spend more time listening to a particular station. So, if you're someone's P1 station, it means they tuned in your station for more time than any of your competitors during a given time frame.

As you'd imagine, these listeners are gold, they're money, they're bank. They're gold – programmers covet them, track them, study them, and figure out ways to keep them happy. And they also strategize about how to find more. That's because the surest way to experience an “off” ratings book is to experience a decline in P1 listeners.

To that end, there are also P2s, P3s, P4s and beyond that describe the next rungs of your audience when it comes to using your station. Over the years, a commonly discussed goal has been to convert your P2s – those who listened to your station second in their radio hierarchy – into P1s.



On paper, it seems simple. If you can figure out what it would take to make your P2s happier, in theory, they could become loyal to your station brand. At least, that's the theory.



There have always been certain fallacies to the P1 argument. First (and maybe foremost), all P1s are not the same. A P1 can be someone who listens to your station 30 hours a week or just one hour. As long as it's a respondent's most-listened-to station, they're a P1. So, there's that.

But the other tricky part of the P1 conversation associating P1 with a loyal fan. It turns out someone can listen to your station more than any other in a given week, but not be especially connected or loyal to you. Sometimes, people are tuning in for a contest, your emergency weather coverage, or a one-off feature – and that time-spent listening contributes to their “P1-ness.” But none of that usage translates to loyalty.

At Jacobs Media, we've used the Net Promoter Score system to better profile loyalty. NPS is a score that measures WOM – or word-of-mouth – the degree to which your listeners recommend your station to others. By all measures, it's important. After all, you're not likely to sing the praises of a brand you don't believe in – especially to friends, family members, and co-workers.



% PROMOTERS - % DETRACTORS = NPS (NET PROMOTER SCORE)

And it's a high bar. You're not considered a "promoter" of a radio station unless you give it a "9" or "10." We use NPS as a tracking mechanism for all commercial, public, and Christian radio. It's been a fixture in our surveys since 2004 when the first of our national studies launched. We produce scores for every participating station. Looked at over time, programmers will tell you it's a good indicator of brand health. And it's a great sign of how a station is able to connect with its true fans.

That – and more – jumped at me recently in a recent story in Nieman Lab by Mark Coddington and Seth Lewis:


"Audience loyalty may not be what we think"

So, the good news is they're quoting a new research study to get at whether loyalty tracks with behaviors such as subscribing, sharing, and liking content from a media organization. Public radio managers often draw these types of comparisons.

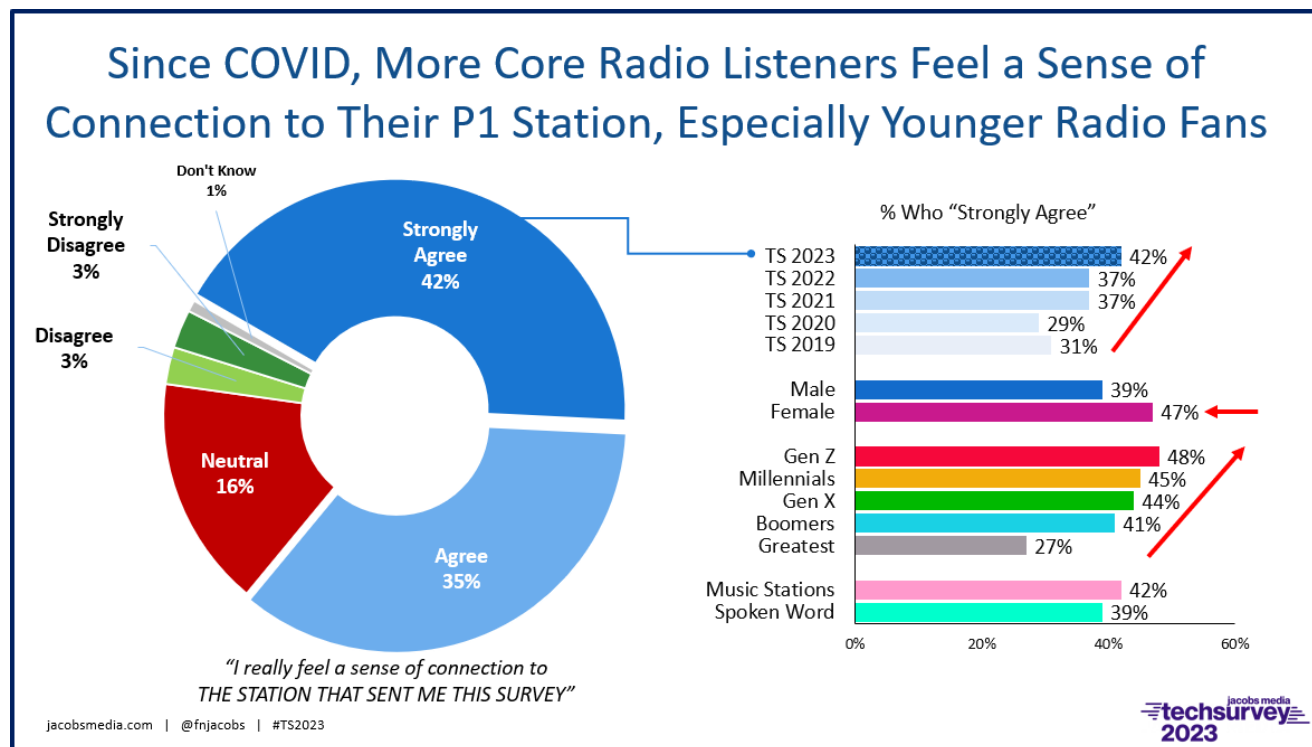
The less-than-optimal news is their study was conducted in Chile, using a multi-survey approach among just 35 "regular news users." So, the degree to which Chileans reflect American tastes is a variable, as is the small sample size.

The findings, however, are worthy of more thought and consideration. First, the research showed that loyalty doesn't necessarily correlate with regular use. One can listen to a station on most weekdays, but not feel a true connection to it, any more than you're loyal to a utility like the power or water companies. And that finding calls into question the validity of the P1 metric used as a measure of loyalty.

Instead, loyalty tends to be more about relationships with news media sources and *personalities* (italics are mine). In other words, having

emotional connections to news outlets and journalists seemed to be most meaningful in consumers who feel a sense of loyalty to them.

And that spurred me onto to relooking at this chart from the just-released Techsurvey 2023 – the one that measures and tracks a sense of connection to a radio station, whether it plays music or broadcasts spoken word content:



Given the core nature of Techsurvey samples, it's not surprising to see strong agreement with the statement:

"I really feel a sense of connection to the station that sent me this survey"

It's when you look at the 5-year trend (upper right) you see what's been going on before and after the pandemic. We are seeing a clear lift for radio stations in our survey – remember there are more than 400 participating in Techsurvey 2023. And the strength of that connection is felt among progressively younger radio listeners, as well as women.

COVID plays into this as well. The pandemic may have been global in scope, but it was most felt and experienced *locally*. Radio stations that provided accurate and relevant information during the worst days, weeks, and months of this ordeal may have had an advantage. But stations that

found a way to make its listeners have hope, while elevating their moods may have enjoyed an even greater edge. It is the only way to explain why a sense of connectedness to a radio station has steadily increased these past few years.

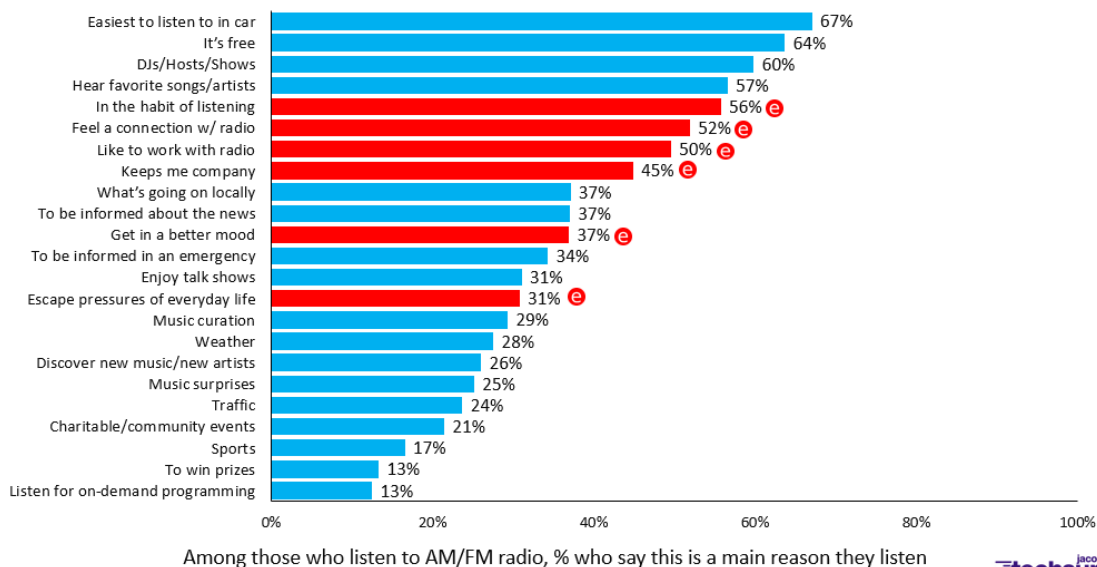
There's something here, and it suggests that while radio – capital R – may be struggling with bloated commercial breaks, predictability, and endless competitive choices – brands that have cultivated personalities and committed to taking a more local stance are in decidedly better shape today.

Many have palpable loyalty from audience members who feel an emotional bond with a radio station, a characteristic they most likely won't feel with Spotify and many of the other digital attractions fans can choose from.

What do those emotions look like? Rarely do you see them measured in station perceptual research. But we track them in our Techsurveys as part of our “Why radio?” series. The chart below highlights the emotional underpinnings of why fans listen to broadcast radio, denoted with those small red circle “e's.”



Why AM/FM Radio? The Emotional Connection



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techsurvey
jacobsmmedia
2023

Like emotional connections, it's complicated. But once we get beyond personalities, music, and the usual main reasons at the top of this chart, the emotions kick in – companionship, mood elevation, escape. The best radio stations deliver on these emotional benefits. They also create habits – the good kind – that make a radio station and/or a morning show a part of one's daily routine.

Whether you run, program, or rep a commercial, public, or Christian station, the study offers insights. And the authors of the article raise the question about how radio brands can “tap into the deep (and complex) feelings of their loyal audiences to develop mutually beneficial relationships.”

I dug into the study (you can also [here](#)) and ran across this noted moment with one of the respondents who described his relationship to a local radio station:

“Miguel, for example, recognized that although the radio station he listens to has made several mistakes in recent times, he has not stopped listening

to it because he 'knows them' and understands that 'these mistakes were not intentional.'"

So, the audience can be forgiving of a station they feel a sense of loyalty to – but there are limits, as the authors conclude:

"This sense of understanding, however, comes with boundaries that when broken are perceived as a betrayal, just like in real families."

This insight speaks to the somewhat fragile nature of relationships, whether they are interpersonal or between a radio station and a listener.

For station business models that rely on audience donations, this is a key point. For commercial stations, the equation is a bit trickier. Using research to better



understand how these emotional connections work is just the beginning.

The brands that will survive the digital apocalypse will not only deliver great personalities, a sense of place, and a great user experience, they will also deliver the emotional goods. It's not an easy task to put it all together, but that's also why few stations can truly be considered "great." When you think of the ones sitting at the top of the heap in their markets, chances are good they're doing all of the above, at a high level.

The cliché, "emotions are running high," fits this theme very well.

For most of these days, that very nicely sums it up.

Public radio stations can sign up right now for PRTS 2023. Details and registration [here](#).

To zero in on Techsurvey 2023 "greatest hits," register now for our free webinar, one week from today on May 10th at 2pm ET. Please click [here](#).

Author



Fred Jacobs

President & Founder at [Jacobs Media](#)

Fred Jacobs founded Jacobs Media in 1983, and quickly became known for the creation of the Classic Rock radio format.

Jacobs Media has consistently walked the walk in the digital space, providing insights and guidance through its well-read national Techsurveys.

In 2008, jacapps was launched - a mobile apps company that has designed and built more than 1,300 apps for both the Apple and Android platforms. In 2013, the DASH Conference was created - a mashup of radio and automotive, designed to foster better understanding of the "connected car" and its impact.

Along with providing the creative and intellectual direction for the company, Fred consults many of Jacobs Media's commercial and public radio clients, in addition to media brands looking to thrive in the rapidly changing tech environment.

Fred was inducted into the Radio Hall of Fame in 2018.



Comments



Bob Bellin says

May 3, 2023 at 12:54 PM

So....while radio's under 40 audience is shrinking, the one's who are still there feel more connected to it. Does that mean that if radio could just lure the under 40s back they'd feel more connected...or is it becoming less and less of a macro vehicle, but a more targeted one? What does that say about the best ways to advertise to its listeners.

This is really interesting research – my guess is that the radio industry will ignore it and get on with the next round of layoffs, but its worth further study. Also, what's more valuable to a radio station, an Active promoter who doesn't listen all that much, or an unmoved, not particularly loyal listener who racks up lots of quarter hours?

Reply



Fred Jacobs says

May 4, 2023 at 8:43 AM

Your first paragraph is the way I read it. Young people (who are still listening) are looking for something to be connected to, like the idea of someone else doing the curating, the surprise of not knowing what's next, etc. that said, the radio broadcasting industry in the US would have its work cut out for it, retrenching to go after young people. The fact there's little-to-no interest in it in the corporate offices tell you all you need to know about the likelihood of it happening.



[Reply](#)**David Manzi says**

May 4, 2023 at 7:21 PM

I think "DJs/Hosts/Shows" deserves one of those small red "e's." When DJs and hosts are doing their job, the emotional bond follows. Always did for me. The great ones I grew up on were never just entertainers, they were friends.

[Reply](#)**Fred Jacobs says**

May 6, 2023 at 9:44 AM

Good point. (I'm getting tired of the mic icon anyway.)

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