

Radio's 2020 Holiday Road Map

JACOBS MEDIA
COVID-19
SURVEY 3

Jacobs
media strategies

RAB RADIO
ADVERTISING
BUREAU

October 2020

Methodology

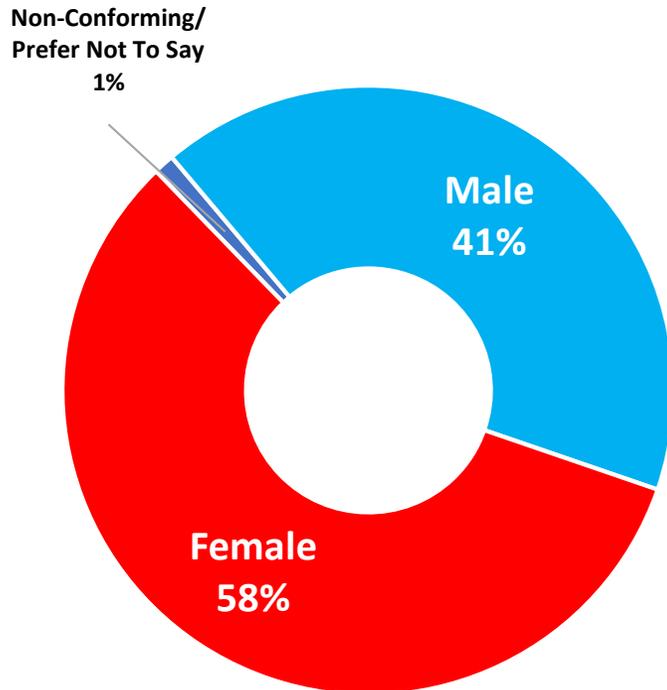
- **355** commercial radio stations in the United States and Canada
- **N = 27,049**
- Interview dates: September 29-October 1, 2020
 - Follow-up to CV1 Radio survey from April and CV2 Radio survey from May
- Most respondents are members of radio station databases. Some responses were gathered via station websites and/or social media pages.
- All responses were collected online and weighted by market population and ethnicity.
- This is a web survey and does not represent all commercial radio listeners or even each station's audience. It is not stratified to the U.S./Canadian population.



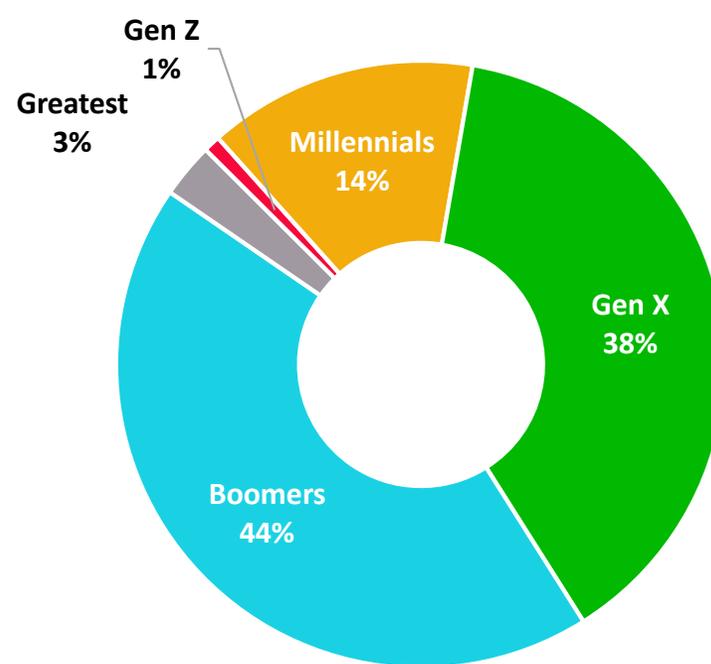
Meet the Respondents

Who Are the Respondents?

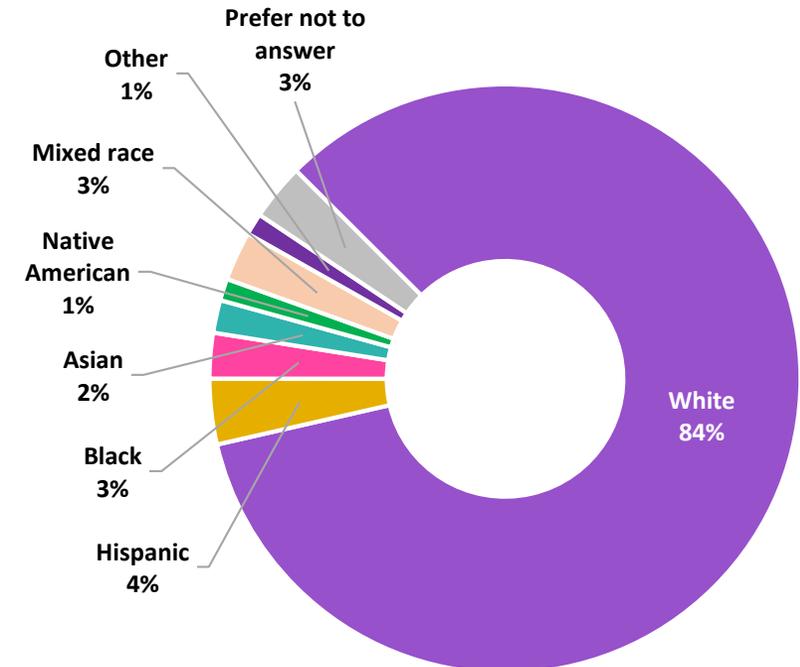
Gender



Generation



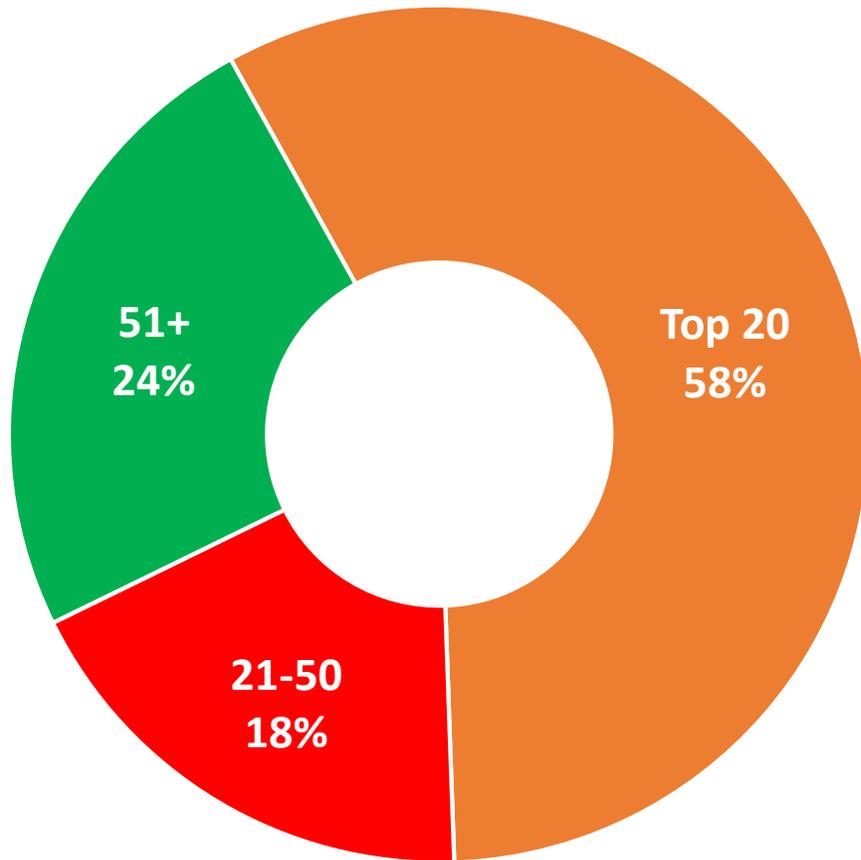
Race/Ethnicity



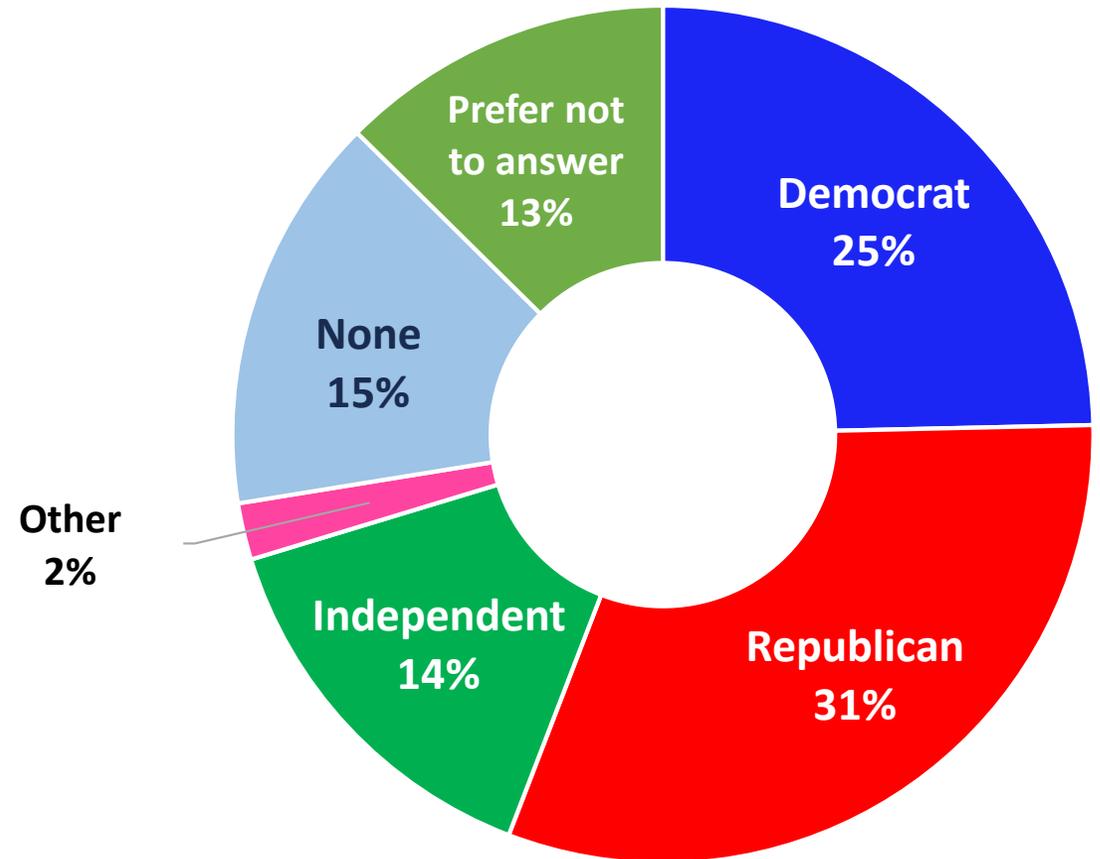
Gen Z (born after 1996)
Millennials (born between 1981-1996)
Gen X (born between 1965-1980)
Baby Boomer (born between 1946-64)
Greatest Generation (born before 1946)

Where They Live and How They Vote

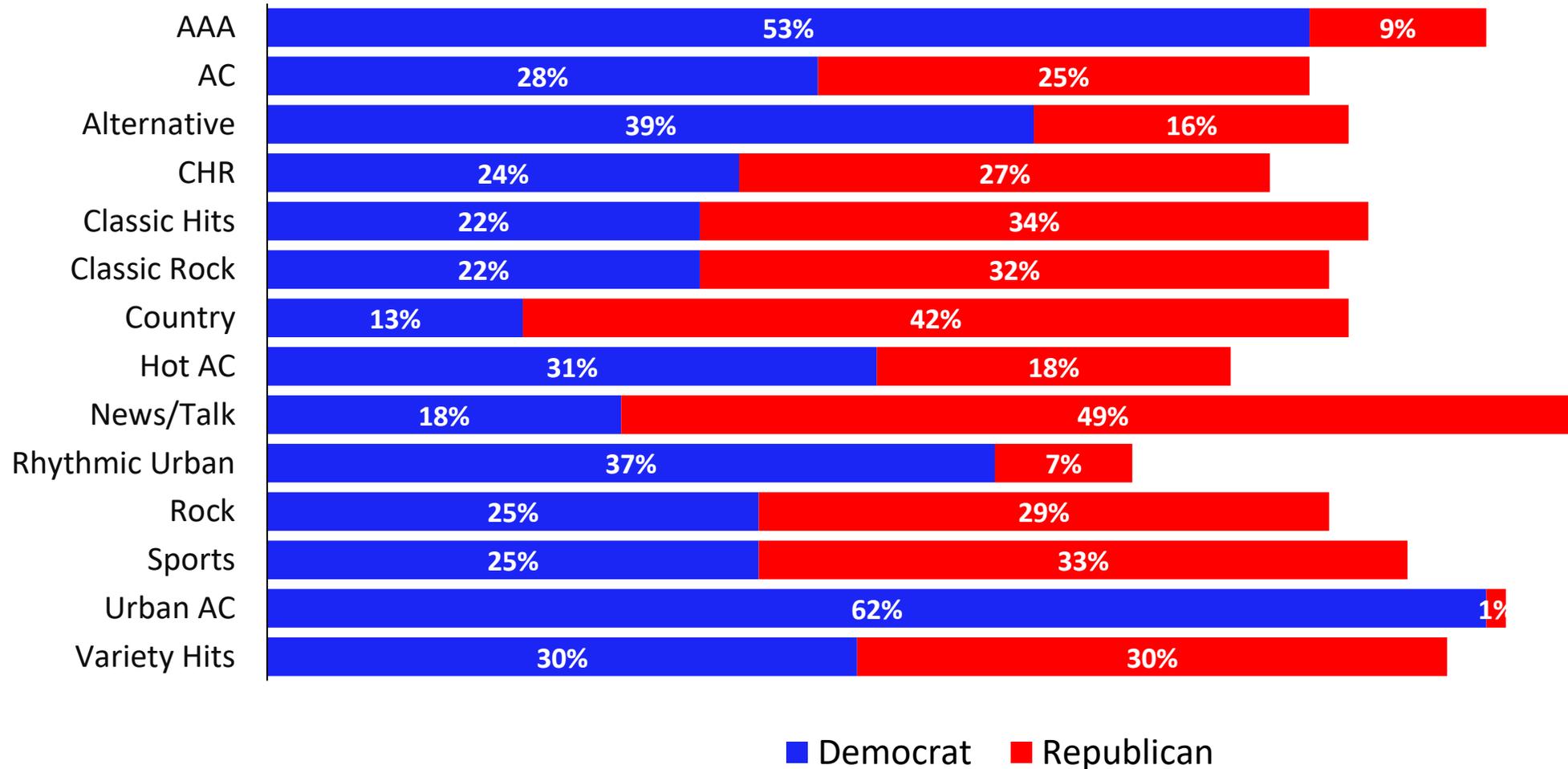
Market Size



Political Party Preference



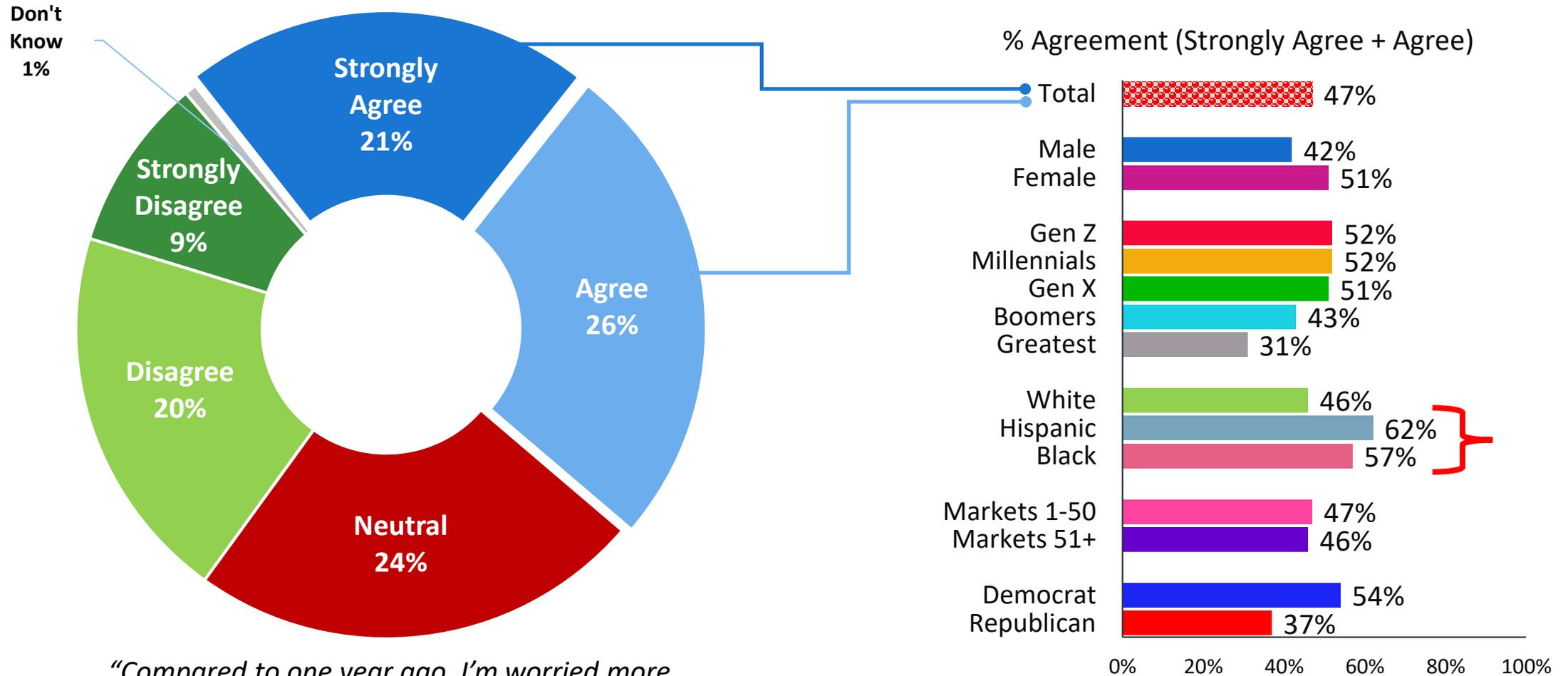
Political Party Preference By Radio Format*





The Economy & Financial Concerns

Nearly Half Say They Are More Worried Now About Their Household's Financial Situation Than One Year Ago

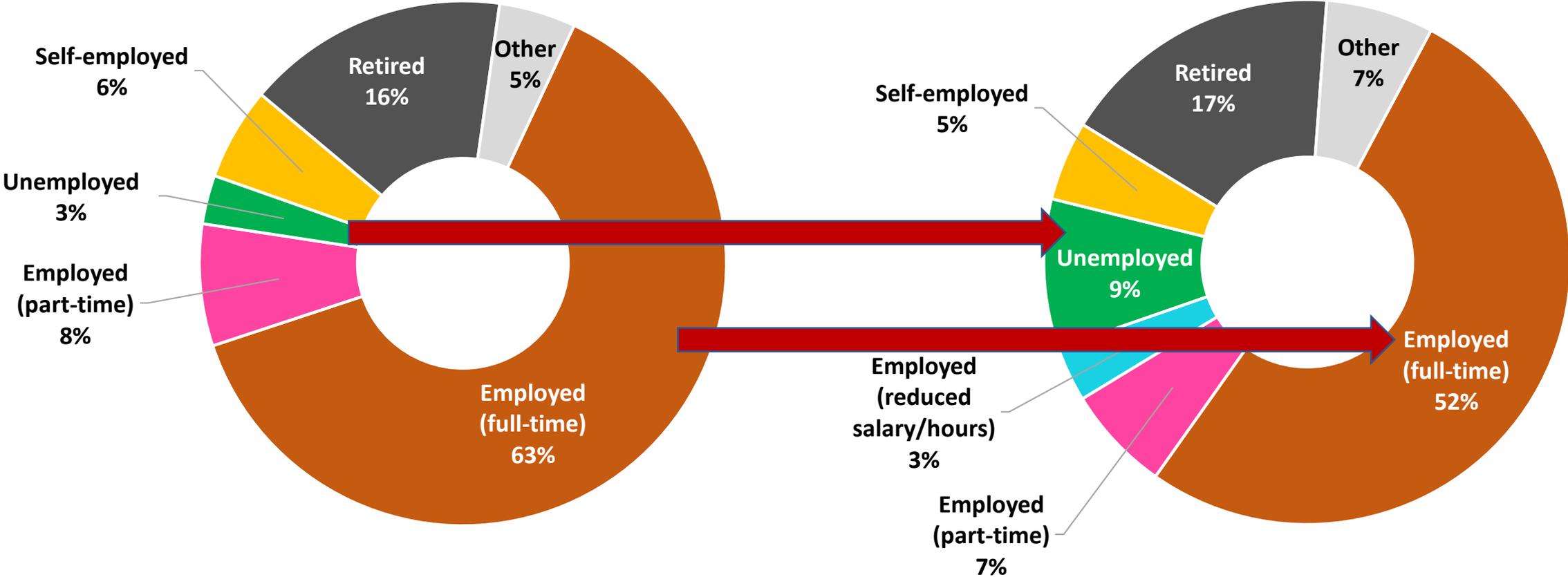


"Compared to one year ago, I'm worried more now about my household's financial situation"

Full-Time Employment Still Lagging Far Behind Pre-COVID Levels

BEFORE Coronavirus Outbreak

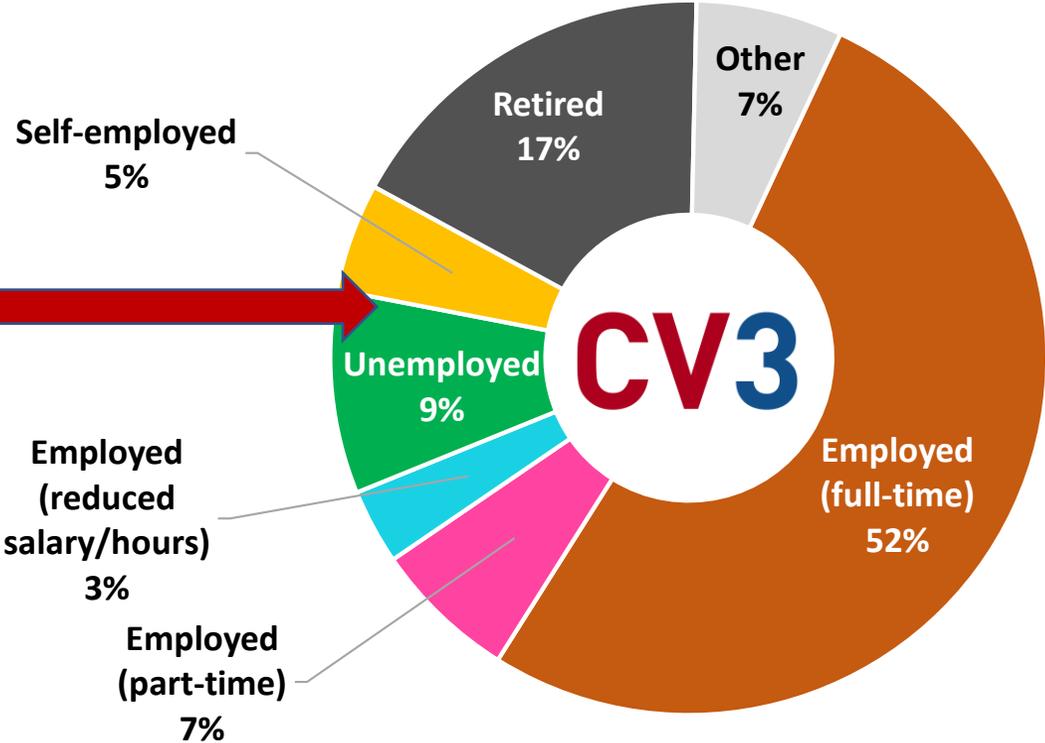
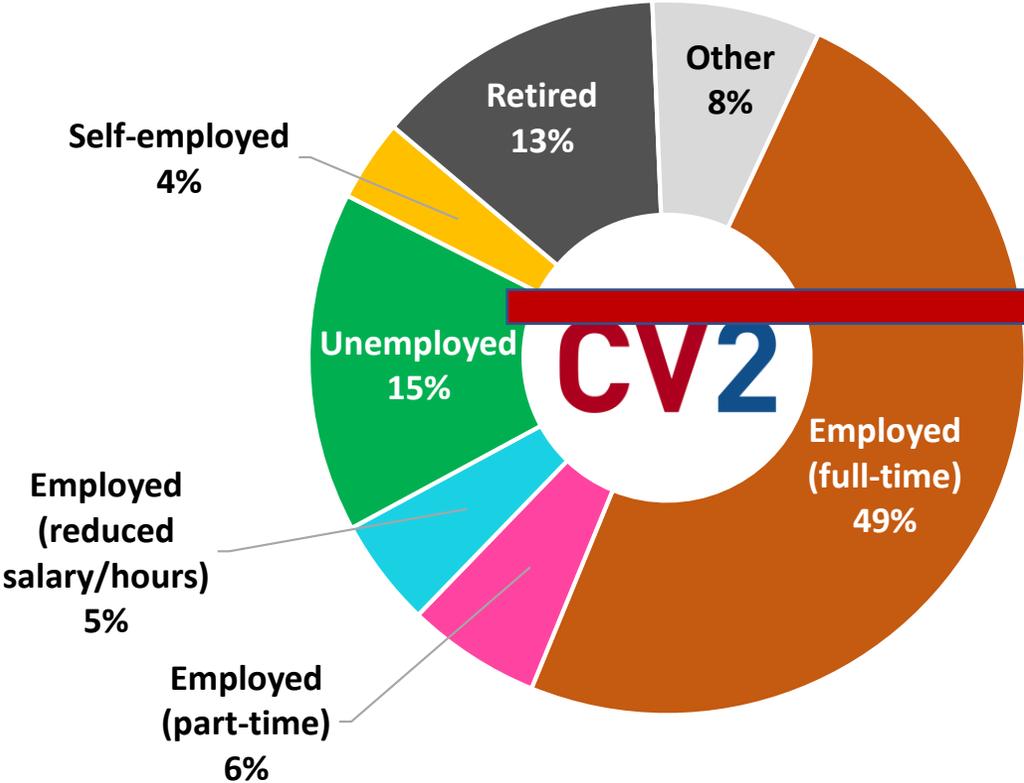
Current Employment Status



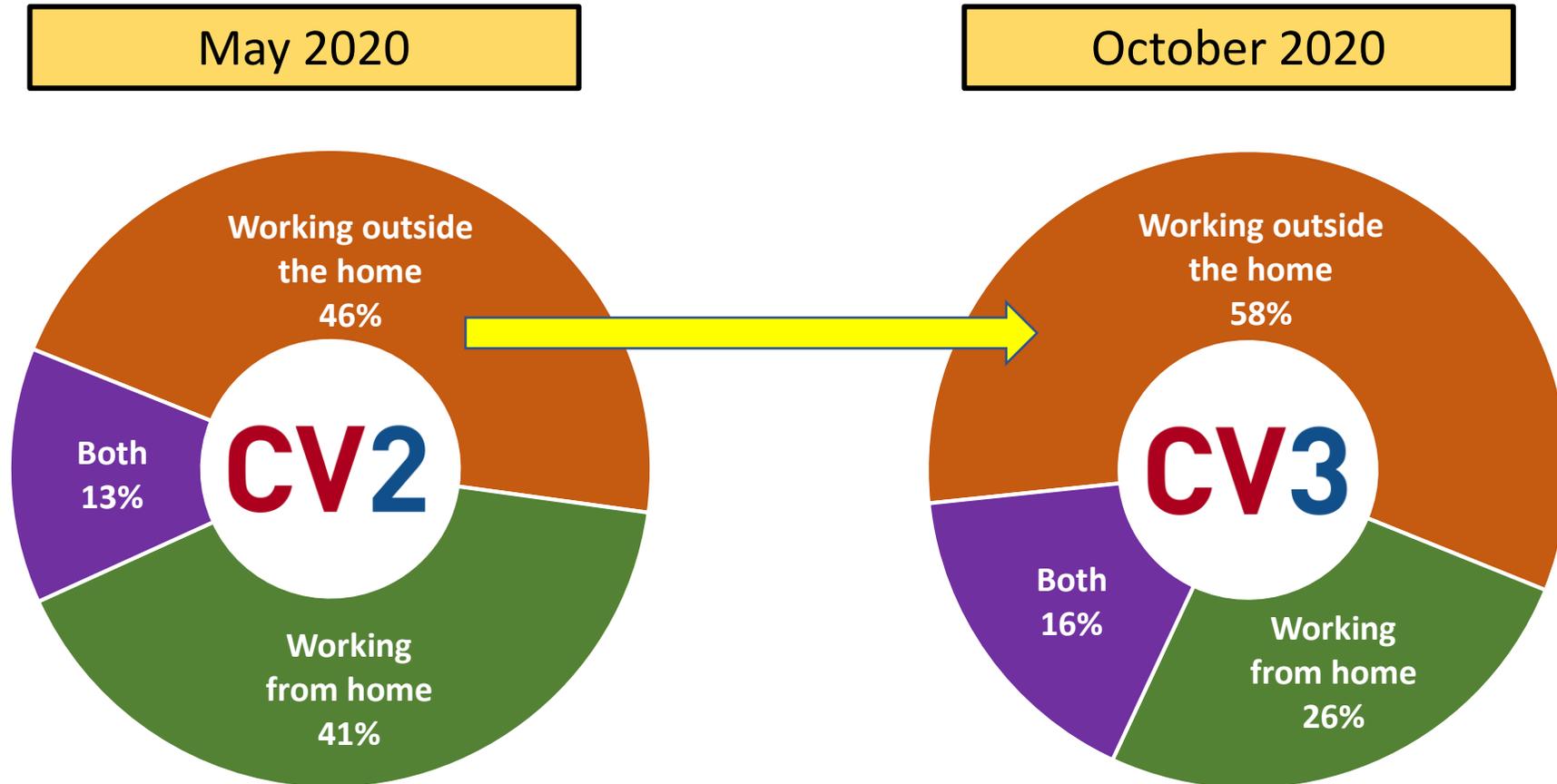
But Unemployment Numbers Have Improved Since May

May 2020

October 2020



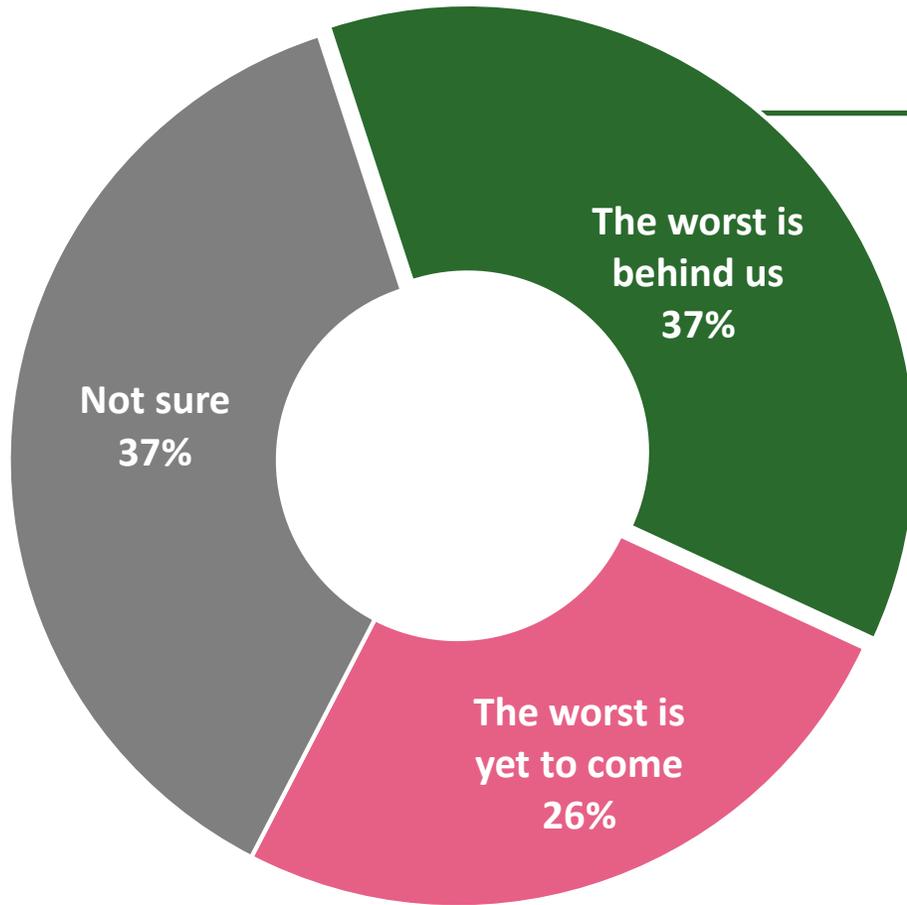
And Among Those Employed, Nearly Three in Four Are Now Working Outside the Home - Up From May





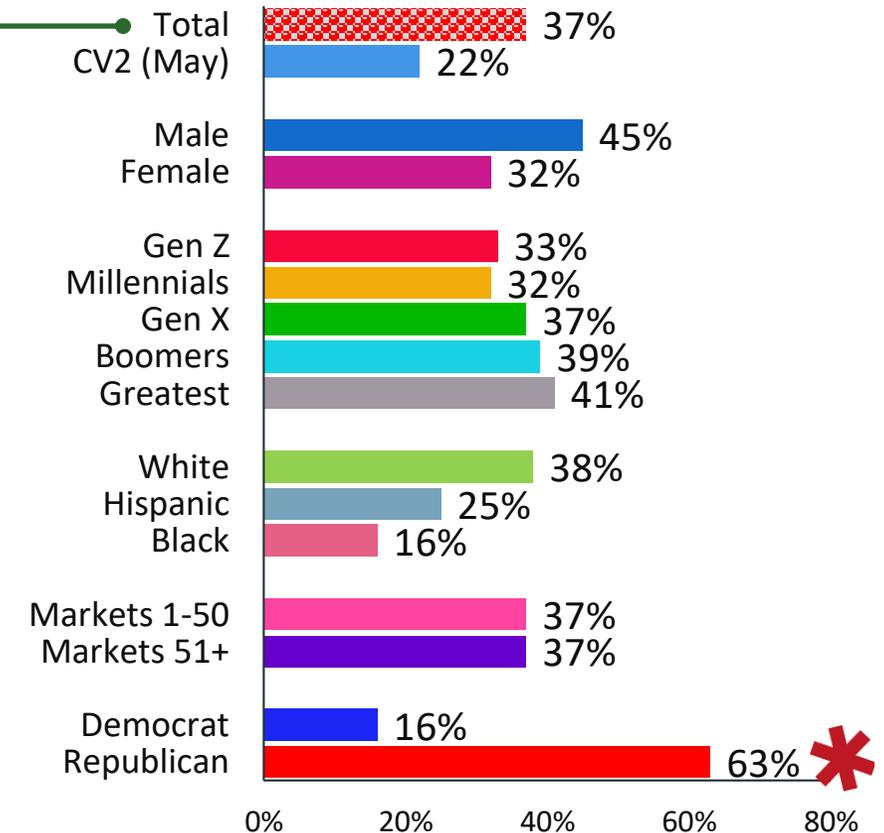
The Radio Audience's Mindset

Just Over One in Three Says the Worst of the Coronavirus Outbreak Is Behind Us

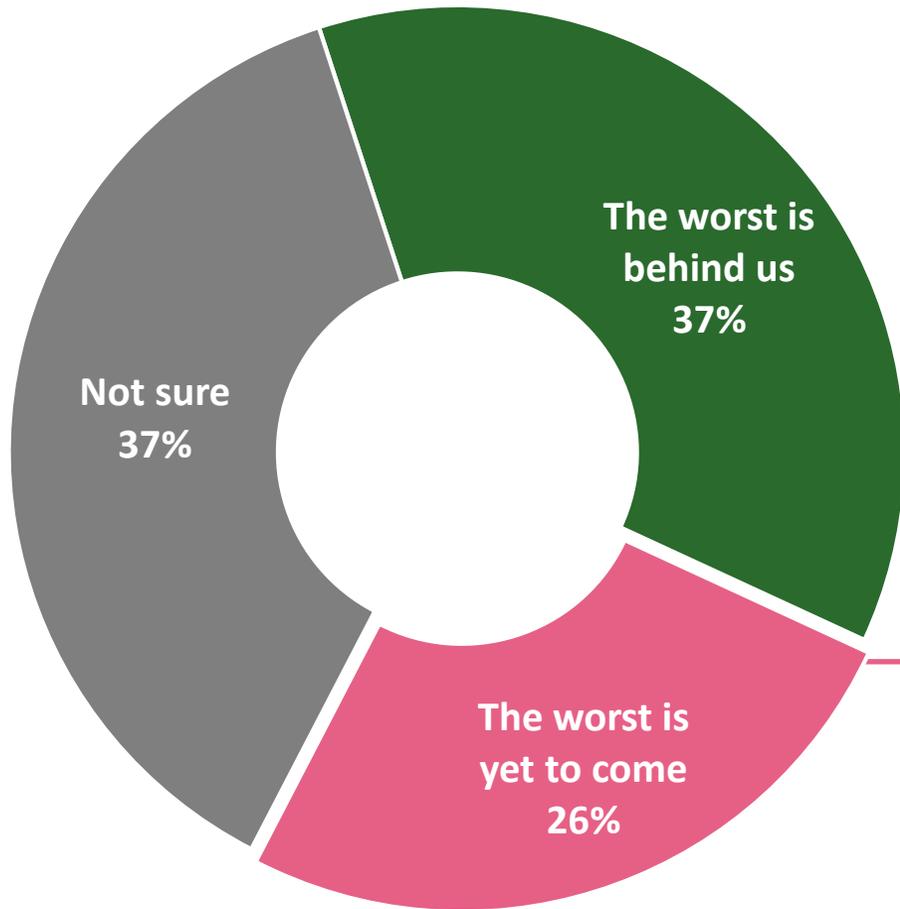


“Which of the following best describes how you feel about the coronavirus outbreak?”

% Who Say the Worst of the Coronavirus Outbreak Is Behind Us

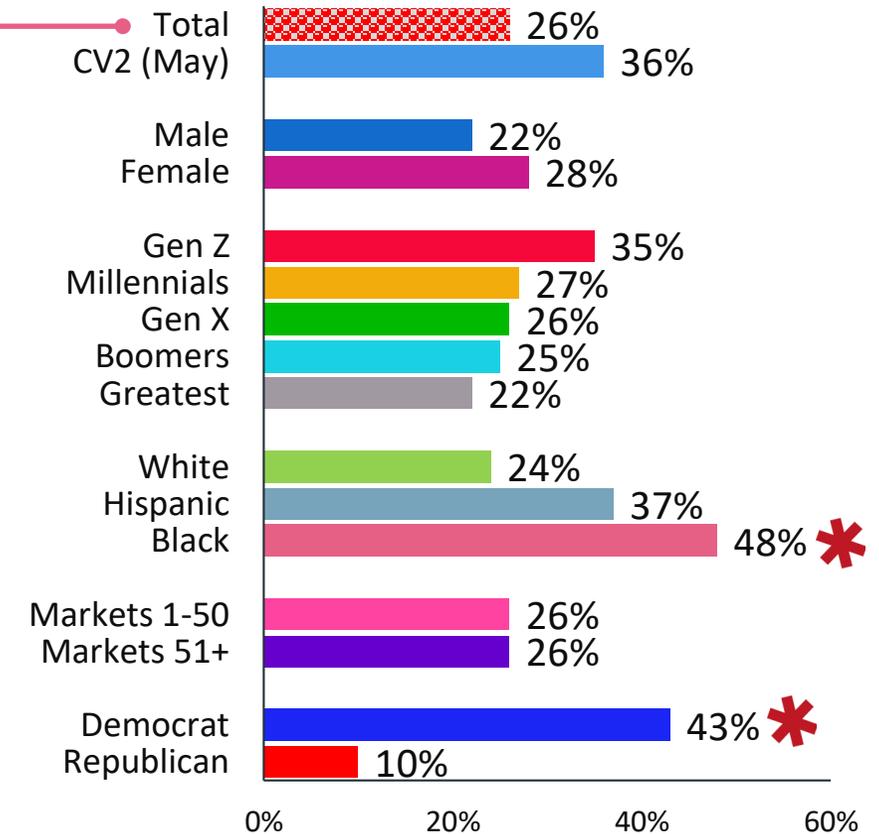


About One in Four Believes the Worst of COVID Is Yet to Come, Especially Blacks and Democrats

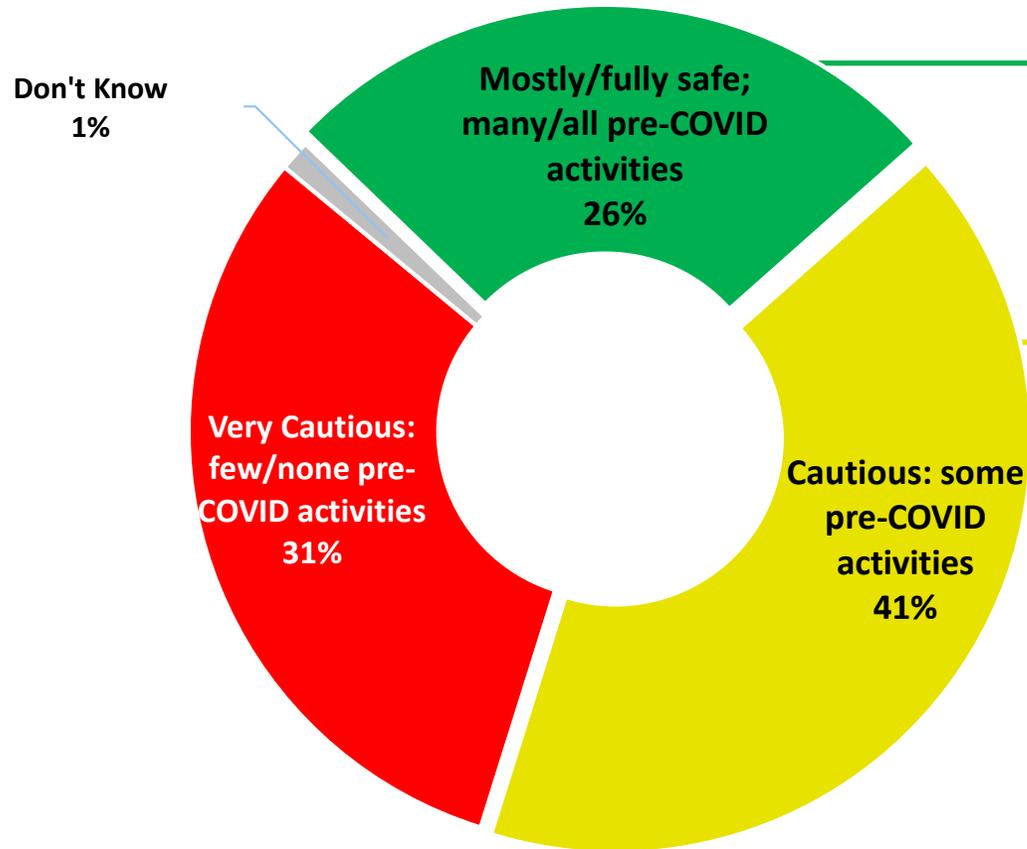


“Which of the following best describes how you feel about the coronavirus outbreak?”

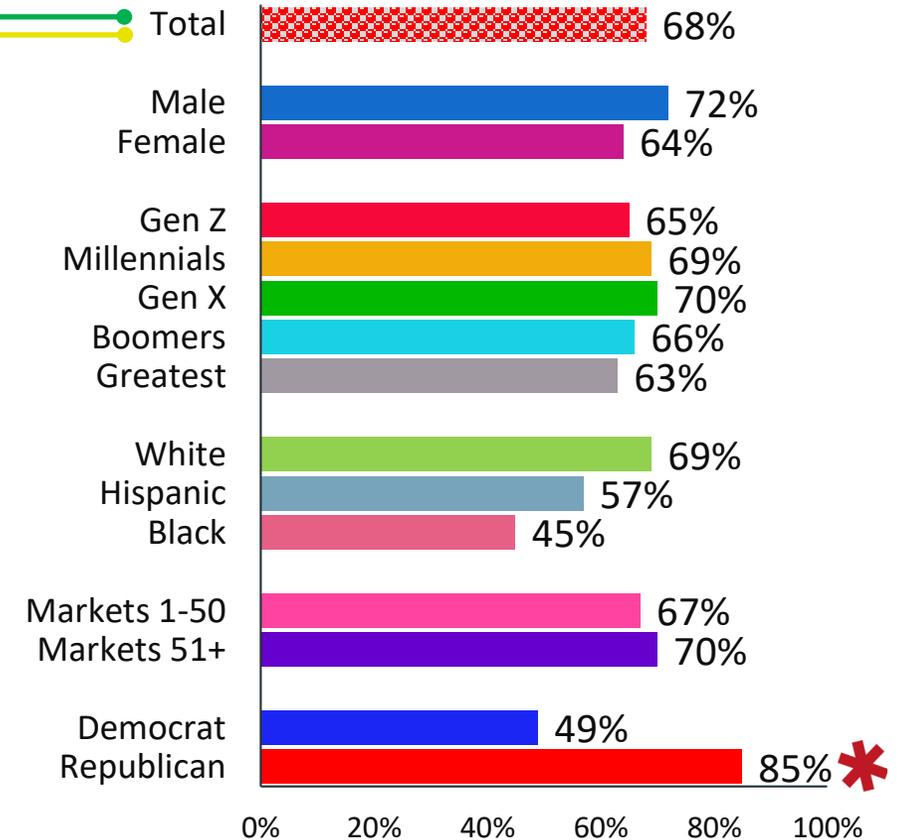
% Who Say the Worst of the Coronavirus Outbreak Is Yet to Come



Two in Three Are Engaging In at Least Some Pre-COVID Activities



% Who Are Doing All/Many/At Least Some Pre-COVID Activities



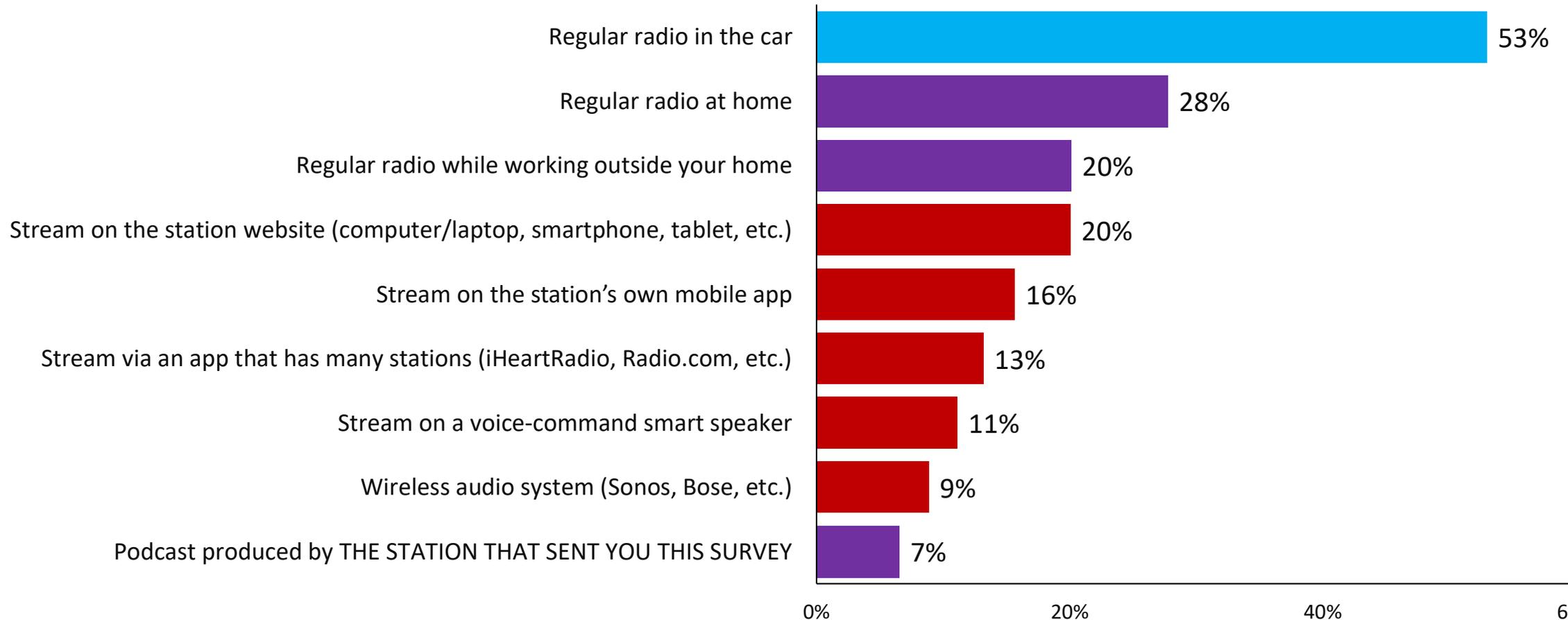
“Now that parts of the country have reopened or removed at least some COVID-19 restrictions, which of the following best describes you?”



Radio Listening & The Coronavirus

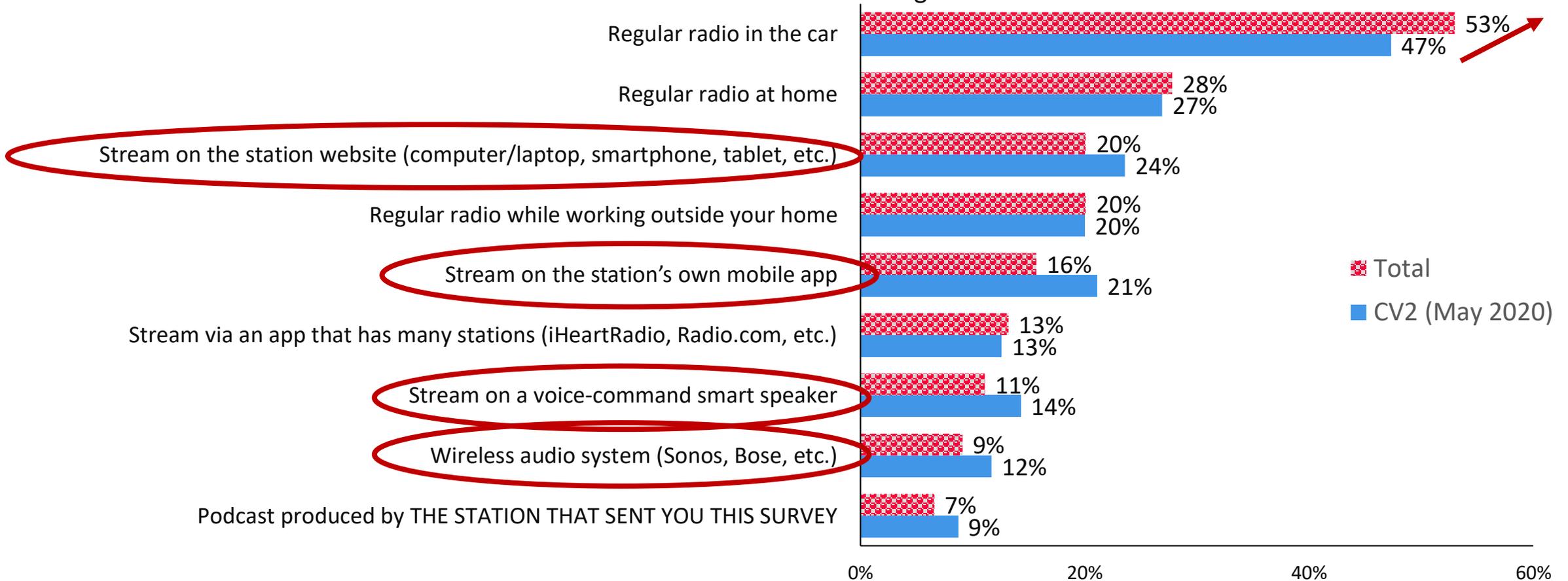
In-Car Listening Is Recovering While Streaming on Various Devices Remains Solid

Among Those Currently Listening to Their Home Station,
% Using Each Platform “A Lot” to Listen to the Station



Since May, In-Car Radio Listening Has Continued to Rebound; Streaming on Various Devices, While Strong, Trends Downward

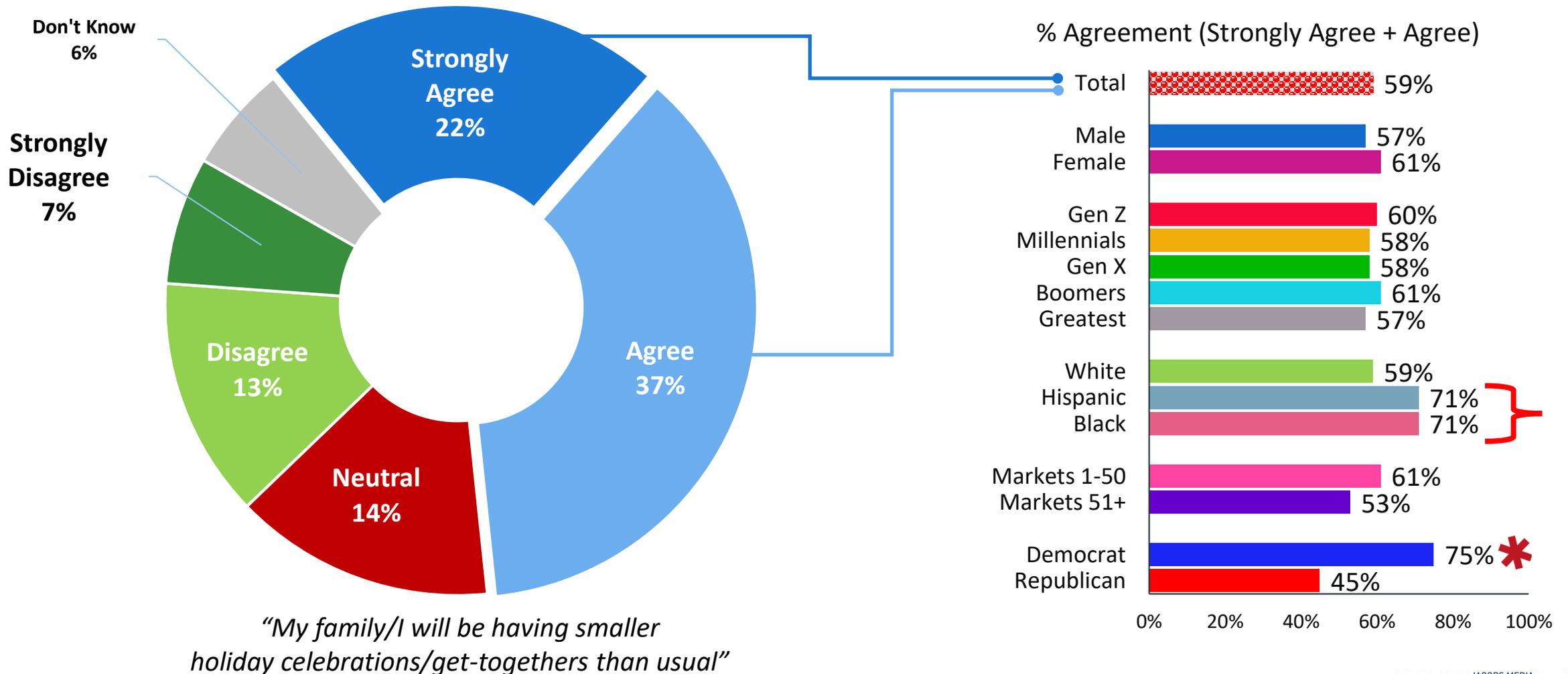
Among Those Currently Listening to Their Home Station,
% Using Each Platform "A Lot" to Listen to the Station



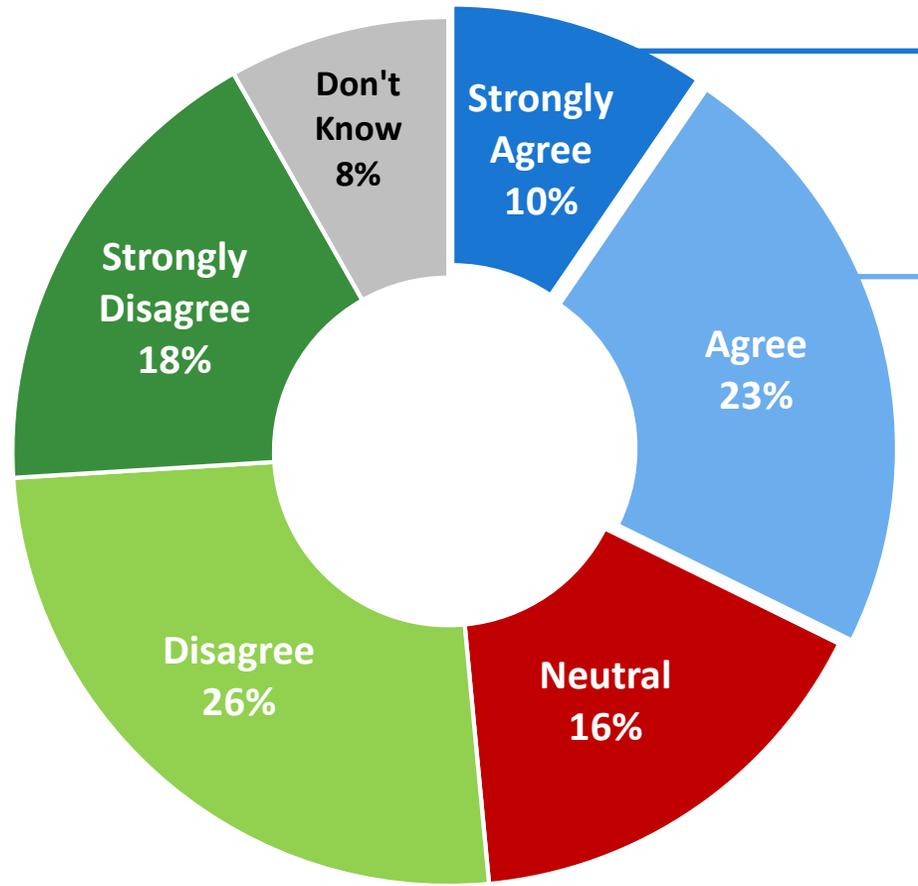


The 2020 Holiday Season

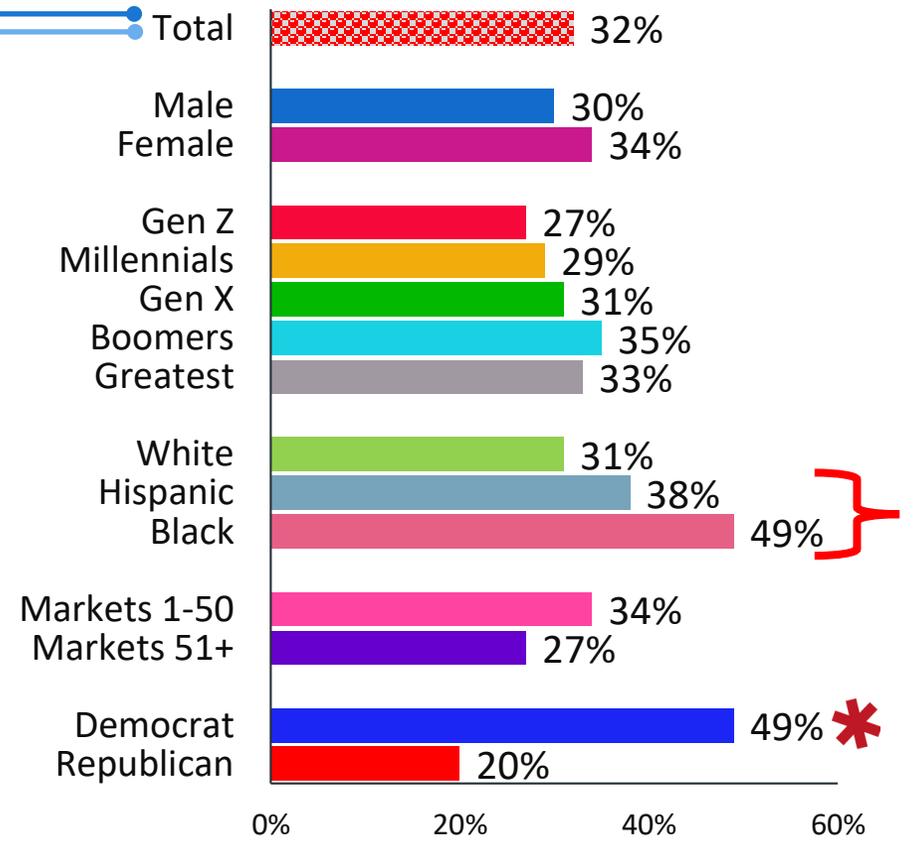
Many Are Planning on Smaller Holiday Gatherings This Season, Particularly Hispanics, Blacks, and Democrats



One-Third Expect Some Virtual Holiday Gatherings This Season, Particularly Blacks and Democrats

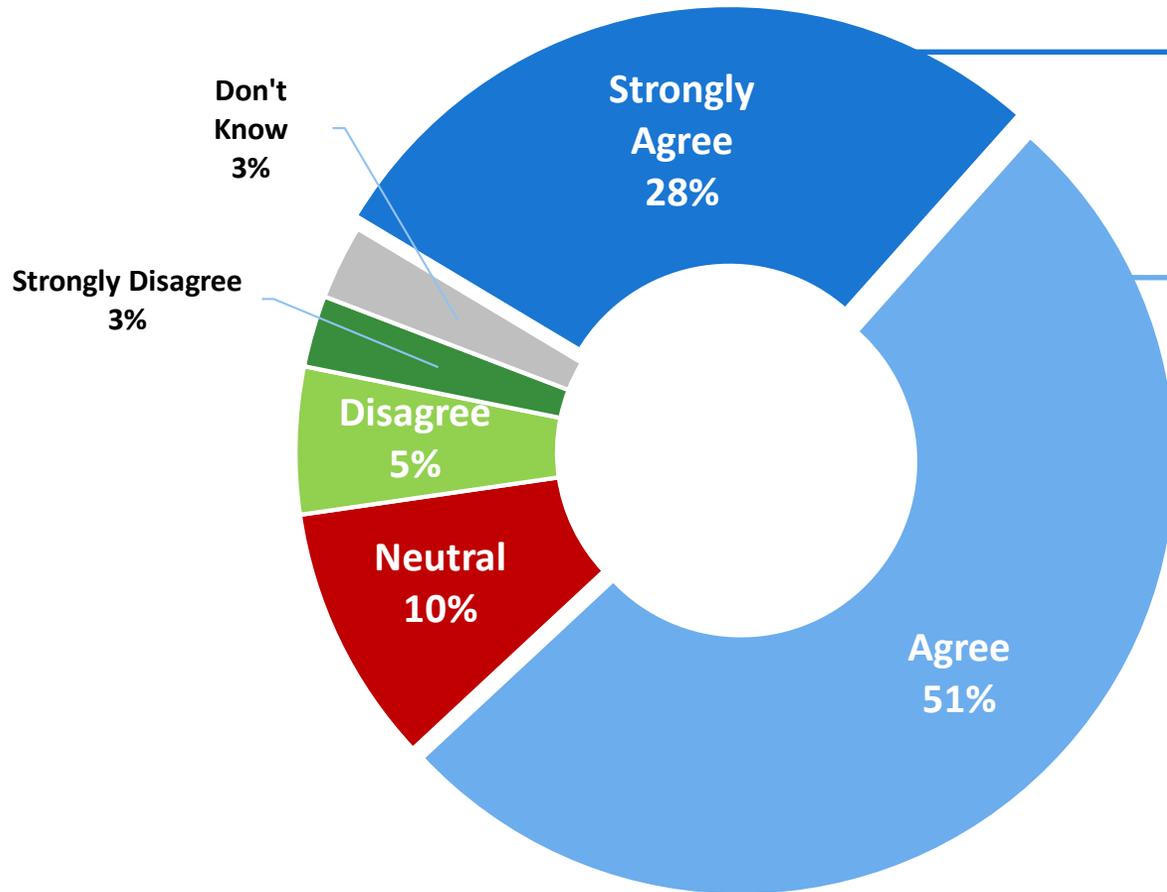


% Agreement (Strongly Agree + Agree)



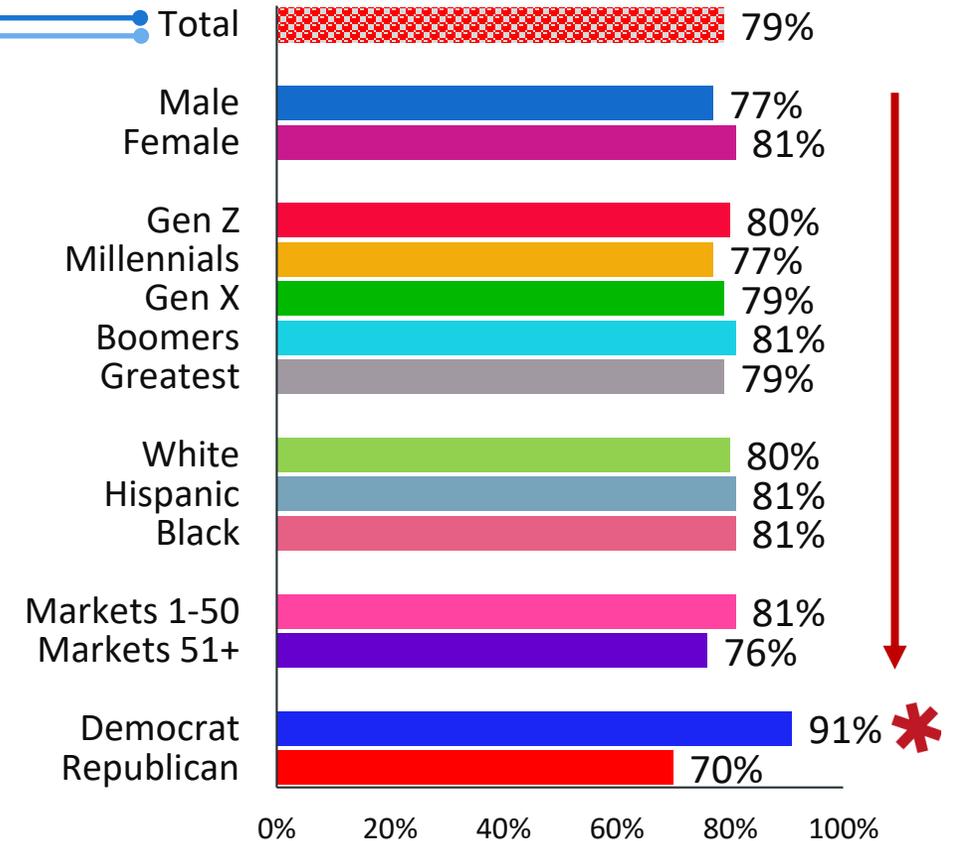
"I expect at least some/all of my/my family's holiday gathering this year will be virtual (Zoom, FaceTime, etc.) rather than in-person"

The Vast Majority Think Many Events Will Be Cancelled This Holiday Season

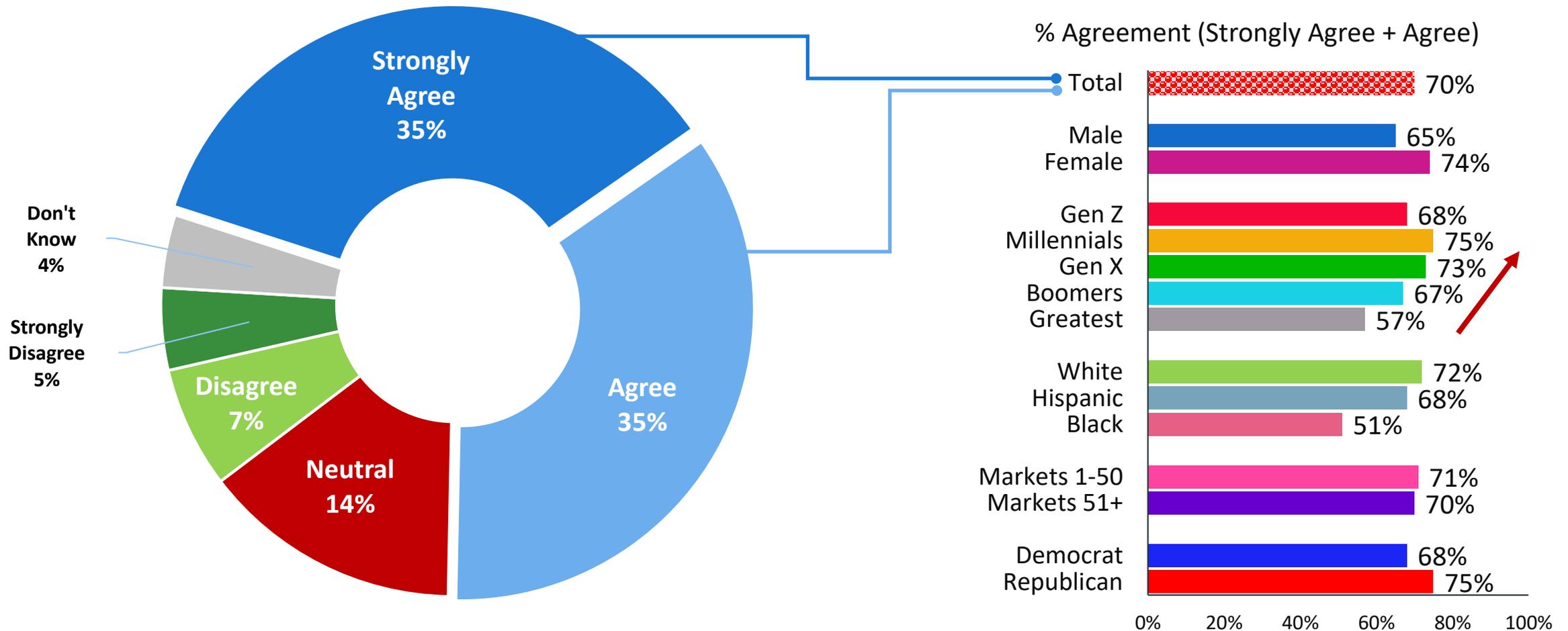


"Many of the usual events that take place during this holiday season will likely be cancelled"

% Agreement (Strongly Agree + Agree)

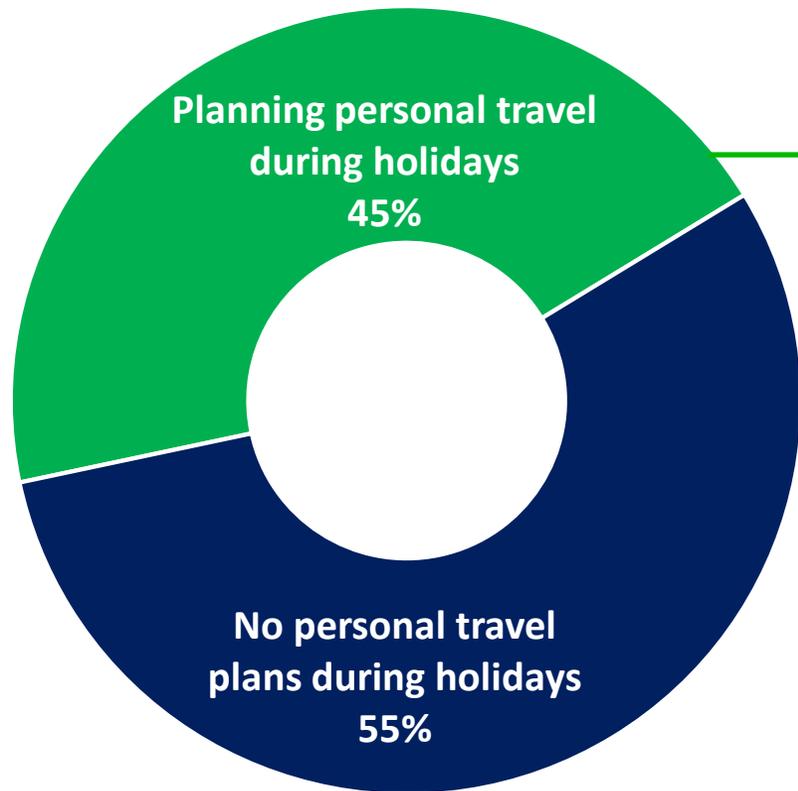


Many Say They Plan to Seasonally Decorate Their Homes This Holiday Season

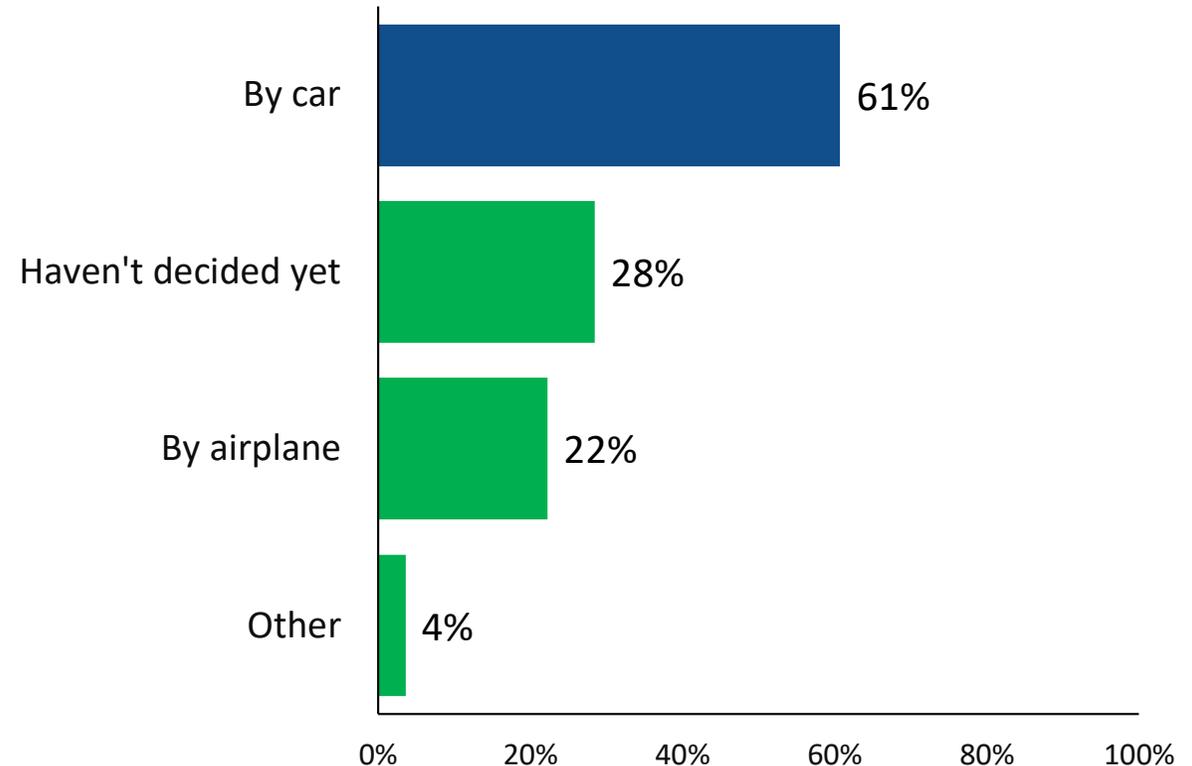


"I plan to seasonally decorate my home this holiday season"

Staying Close to Home: a Majority Plan No Personal Travel During the Holidays; Car Trips Are the Top Choice



Among Those Planning Personal Travel This Holiday Season, % Planning to Travel by Each Method of Transportation (multiple responses accepted)





Retail Stores, Health and Services

Facemask Requirements for Shoppers and Employees Are Most Important For In-Store Shopping

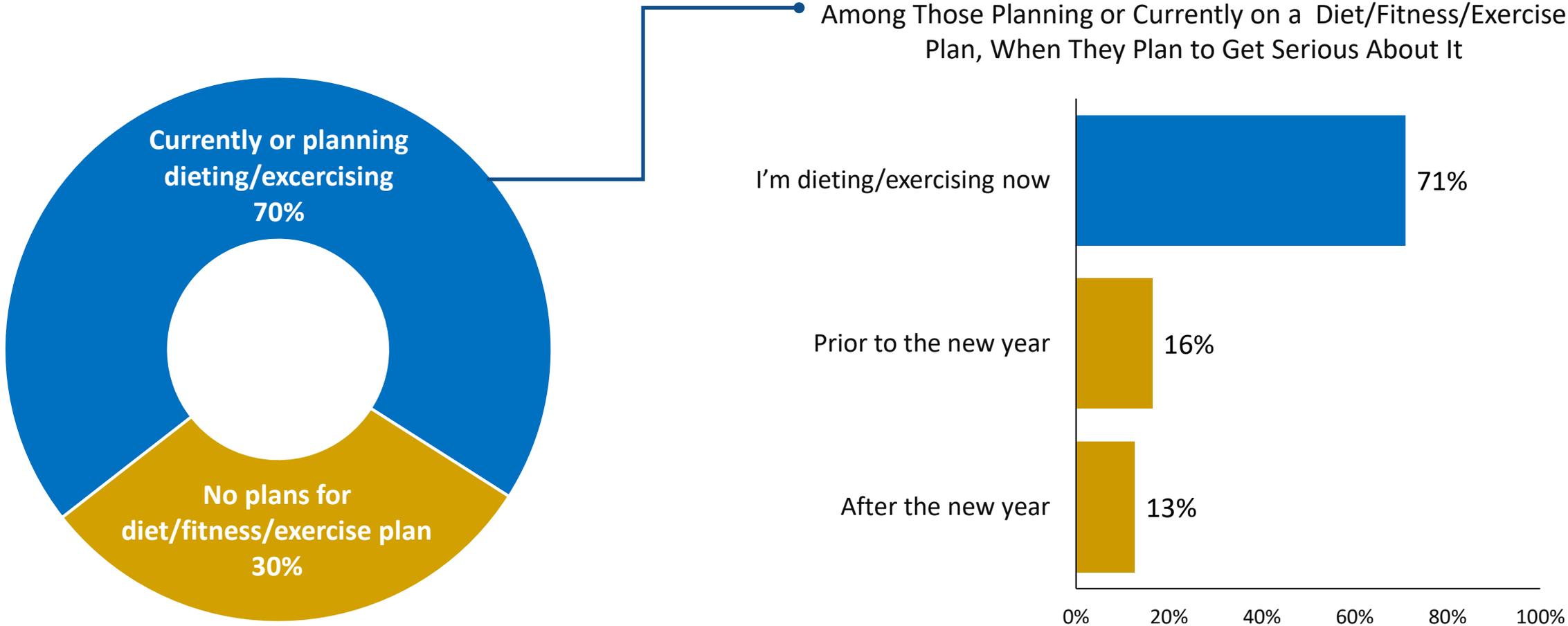
% Who Say Each Store Service/Rule Is "Very Important" to Their In-Person Shopping



More Women Than Men Find In-Store Safety Rules and Procedures to Be Very Important



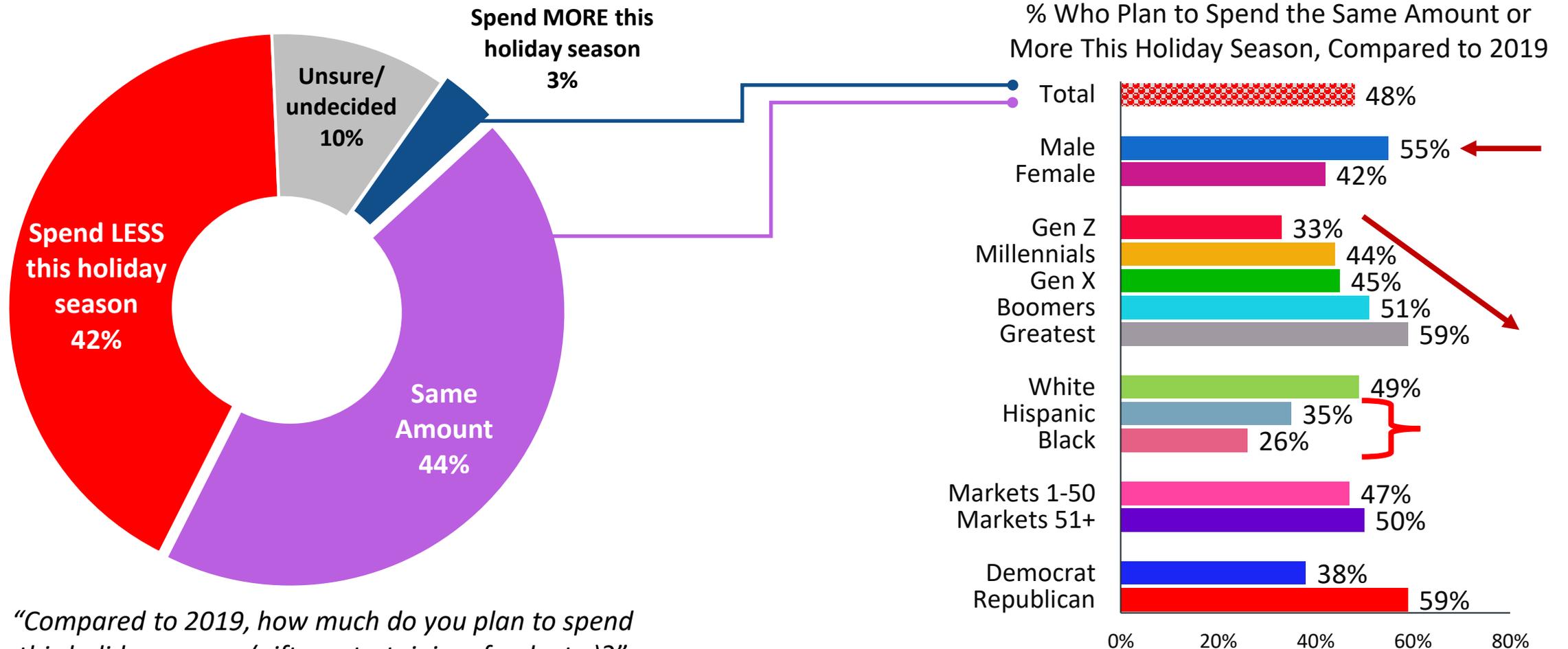
Seven in Ten Are Either Planning or Currently on a Diet/Fitness/Exercise Plan





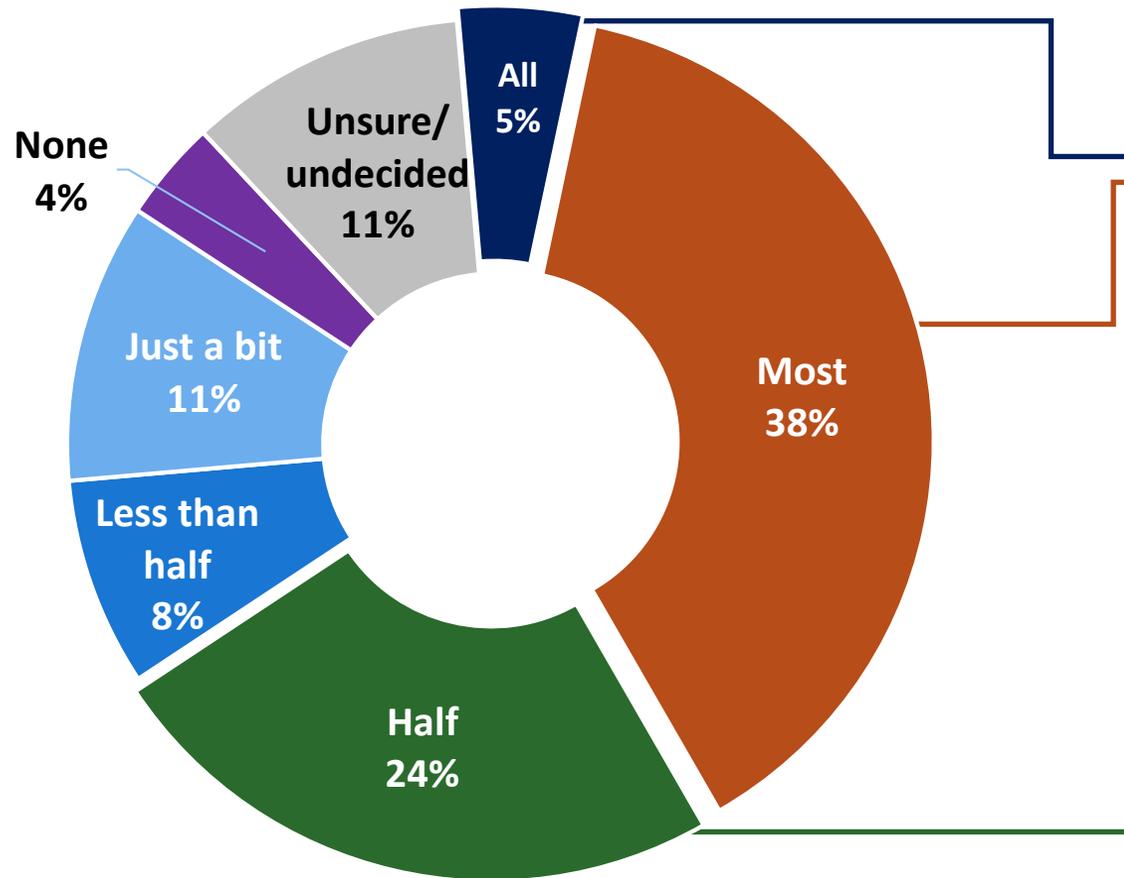
Holiday Shopping

Consistent Spenders This Holiday Season Look to Be Men, Progressively Older Respondents, and Republicans

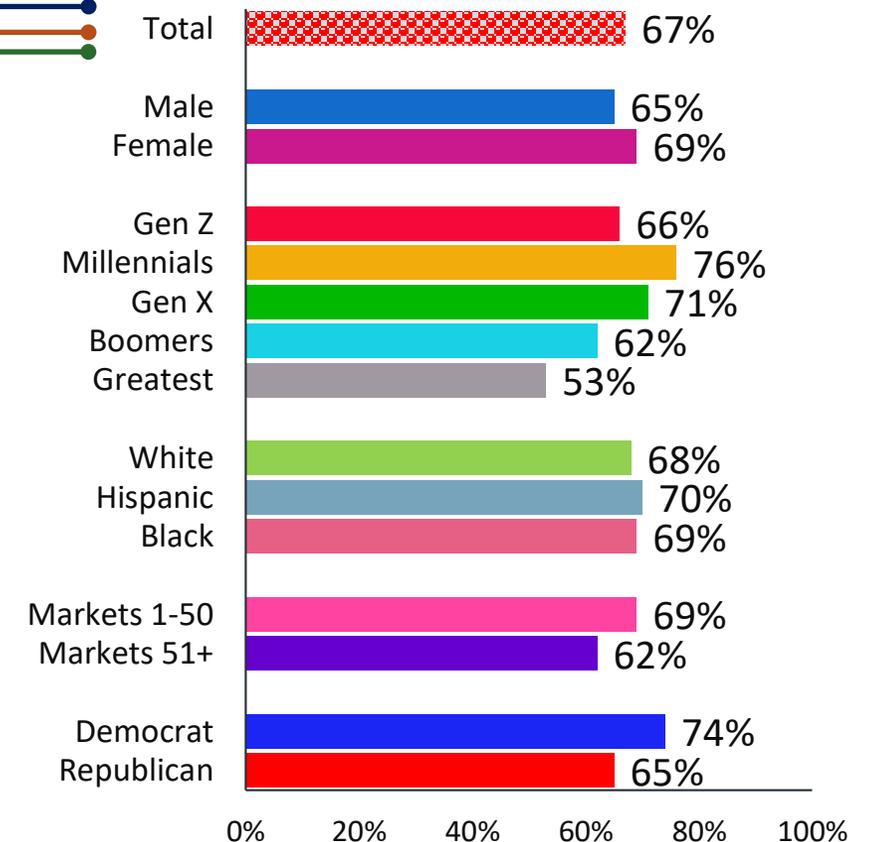


“Compared to 2019, how much do you plan to spend this holiday season (gifts, entertaining, food, etc.)?”

Two in Three Expect Say They'll Do at Least Half Their Holiday Shopping Online, Especially Millennials and Gen Xers



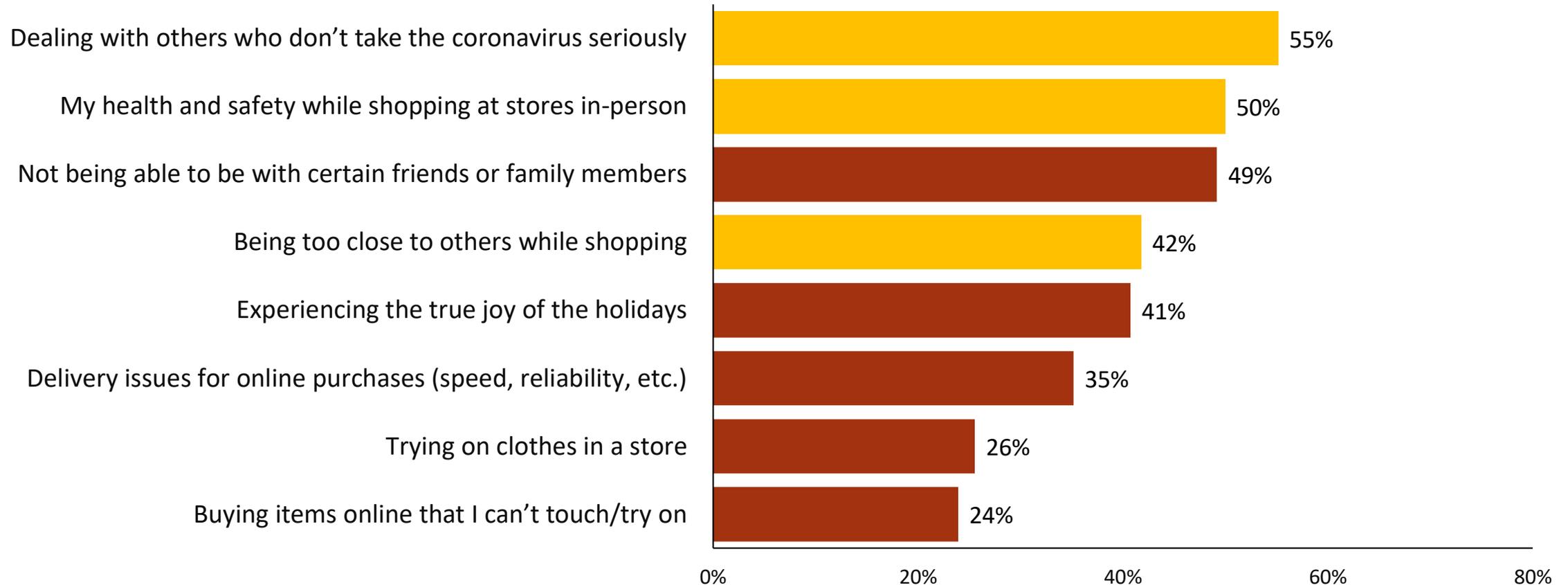
% Who Say at Least Half of Their Holiday Shopping This Year Will Be Done Online



“What portion of your total holiday shopping this year do you anticipate will be ONLINE (rather than in-person at stores)?”

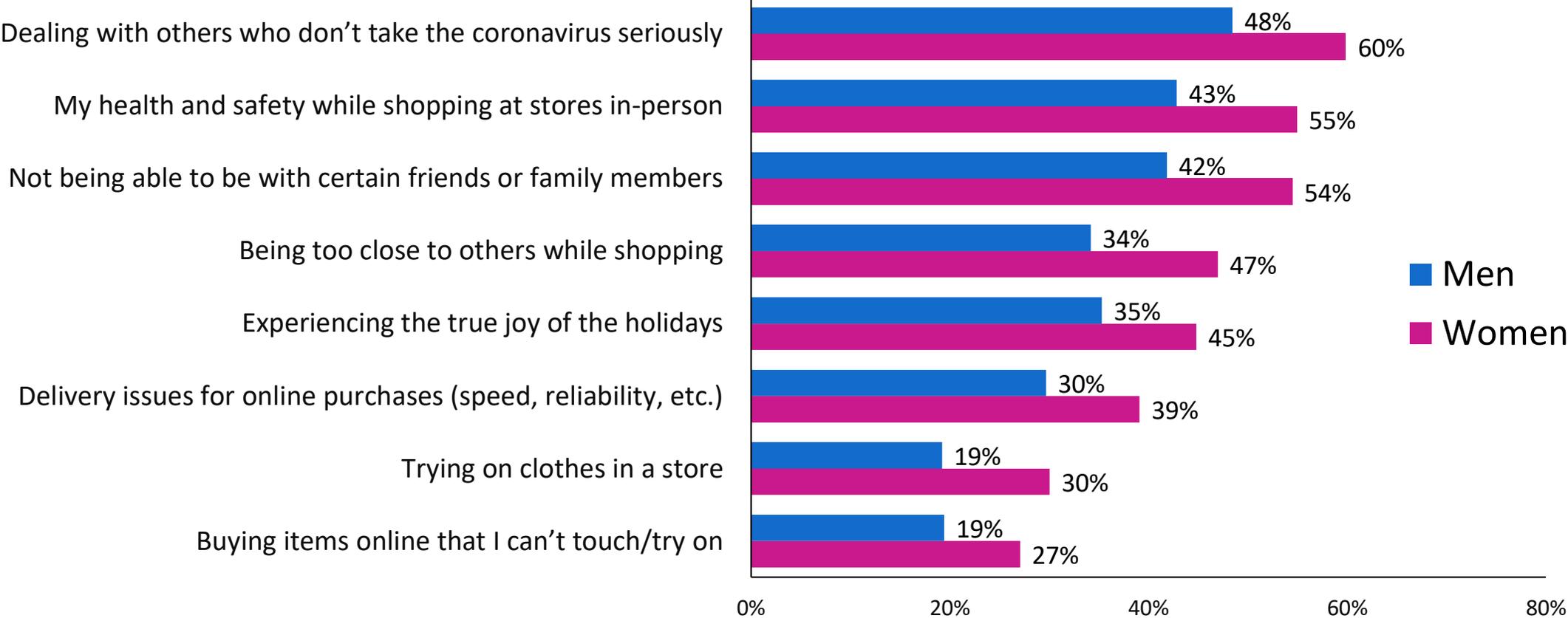
Health and Safety Issues Lead the List of Holiday Concerns

% Who Say Each Is a "Major Concern" This Holiday Season

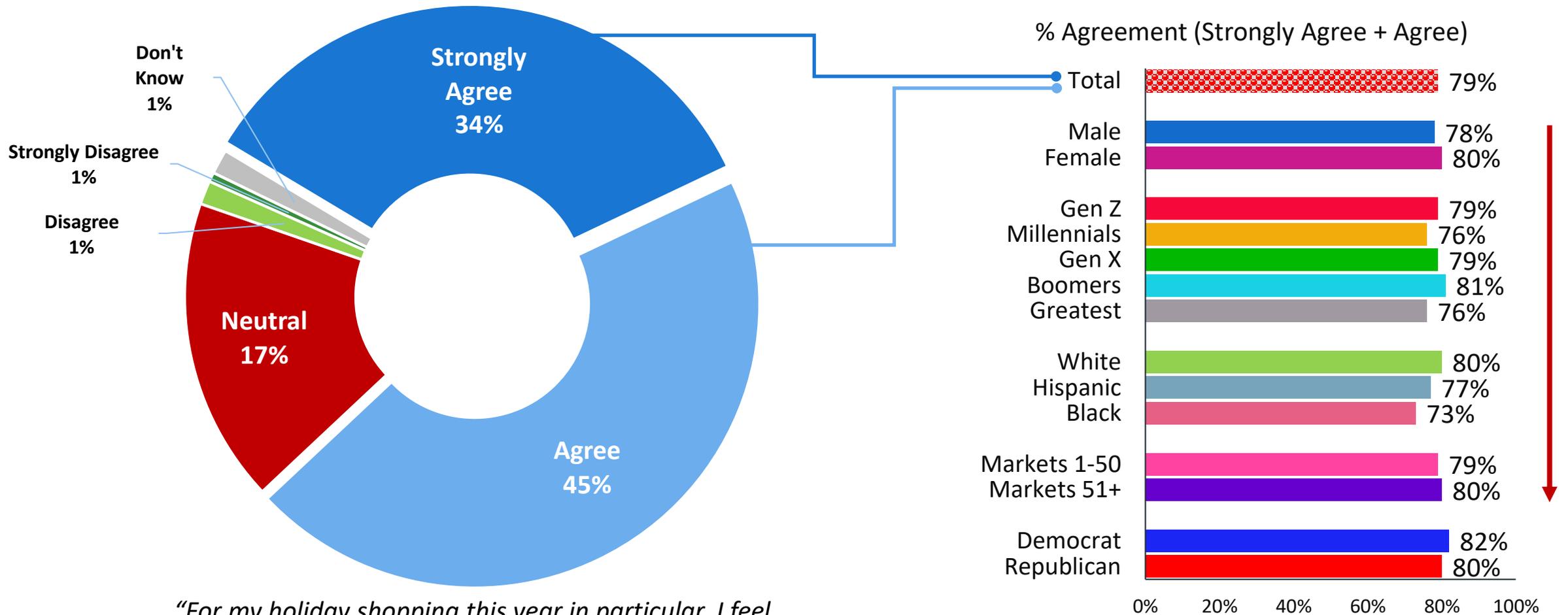


Women Are More Concerned Than Men About Everything

% Who Say Each Is a "Major Concern" This Holiday Season

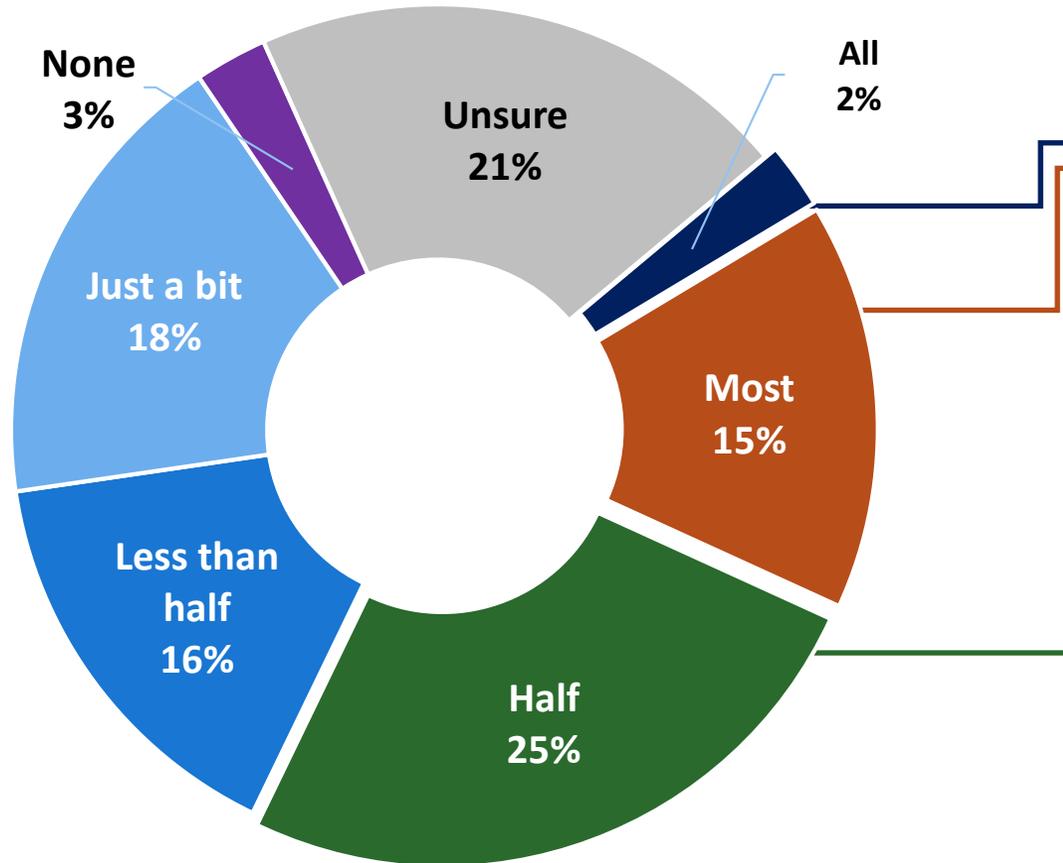


Most Plan to Support Local/Small Businesses This Holiday Season



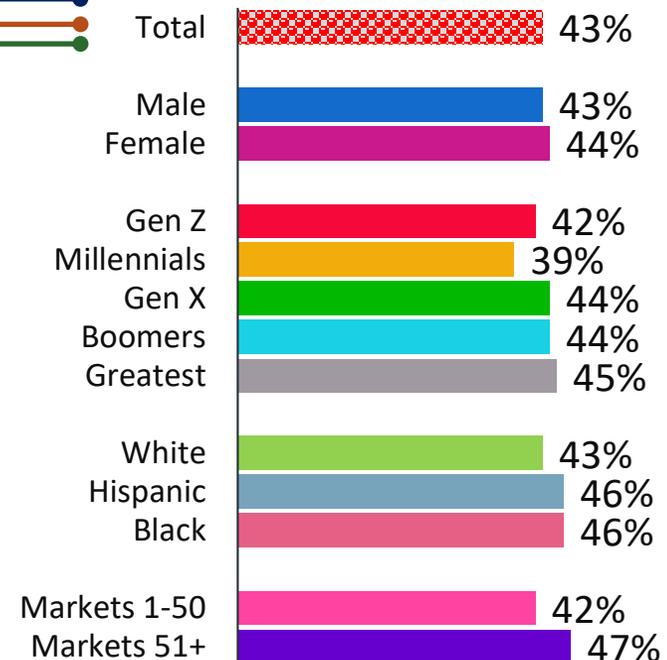
“For my holiday shopping this year in particular, I feel I should support local/small businesses in my area”

Those Influenced By Radio Ads and DJ Testimonials Are Especially Likely to Shop Locally This Holiday Season



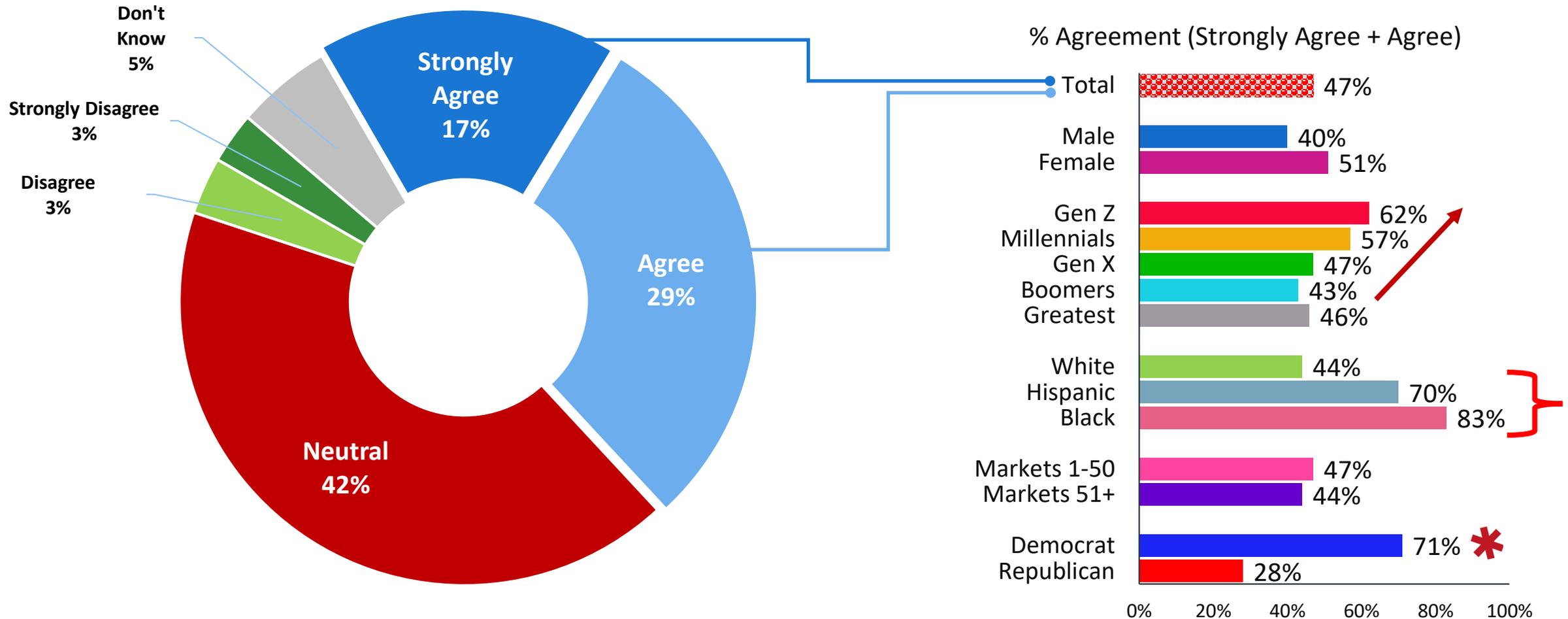
“What portion of your total holiday shopping (in-person and/or online) this year do you anticipate will be from locally-owned stores in your metropolitan area (rather than national chains)?”

% Who Say at Least Half of Their Holiday Shopping This Year (In-Person or Online) Will Be From Locally-Owned Area Stores



0% 20% 40% 60% 80%

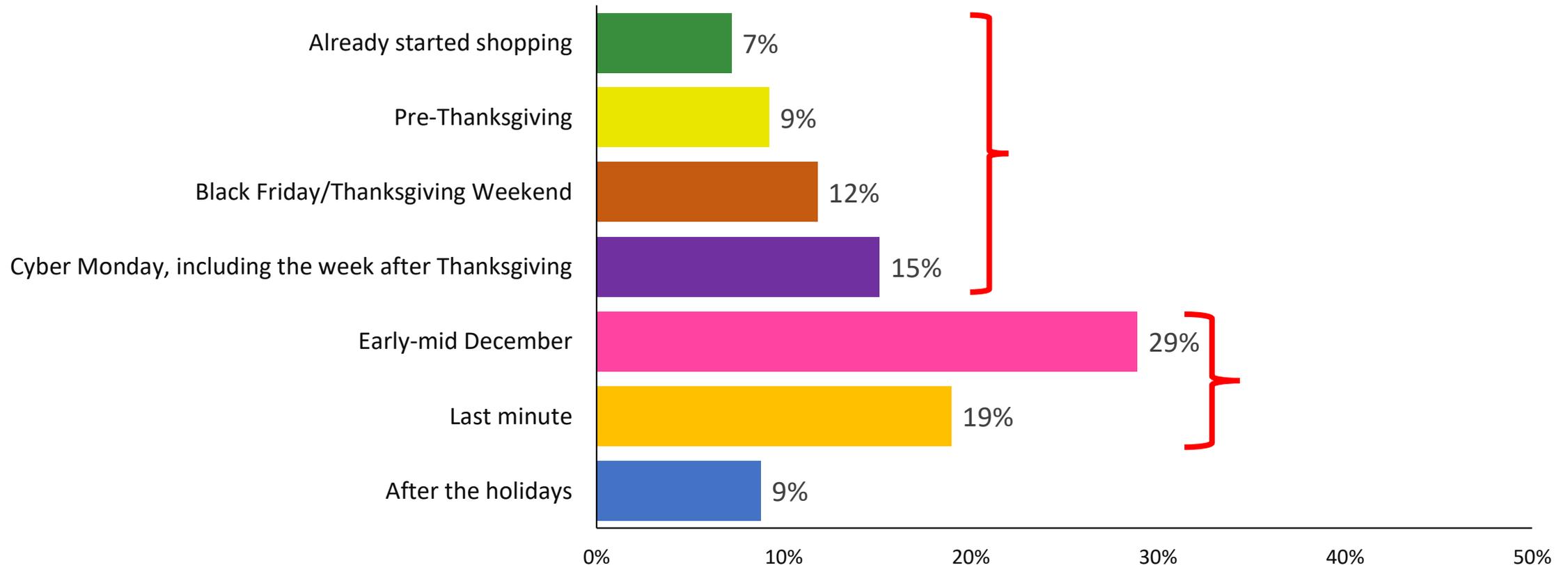
Almost Half Say They Plan to Support Minority-Owned Businesses, Particularly Women, Minorities, Dems, and Younger Generations



“(This holiday season) I plan to support minority-owned businesses”

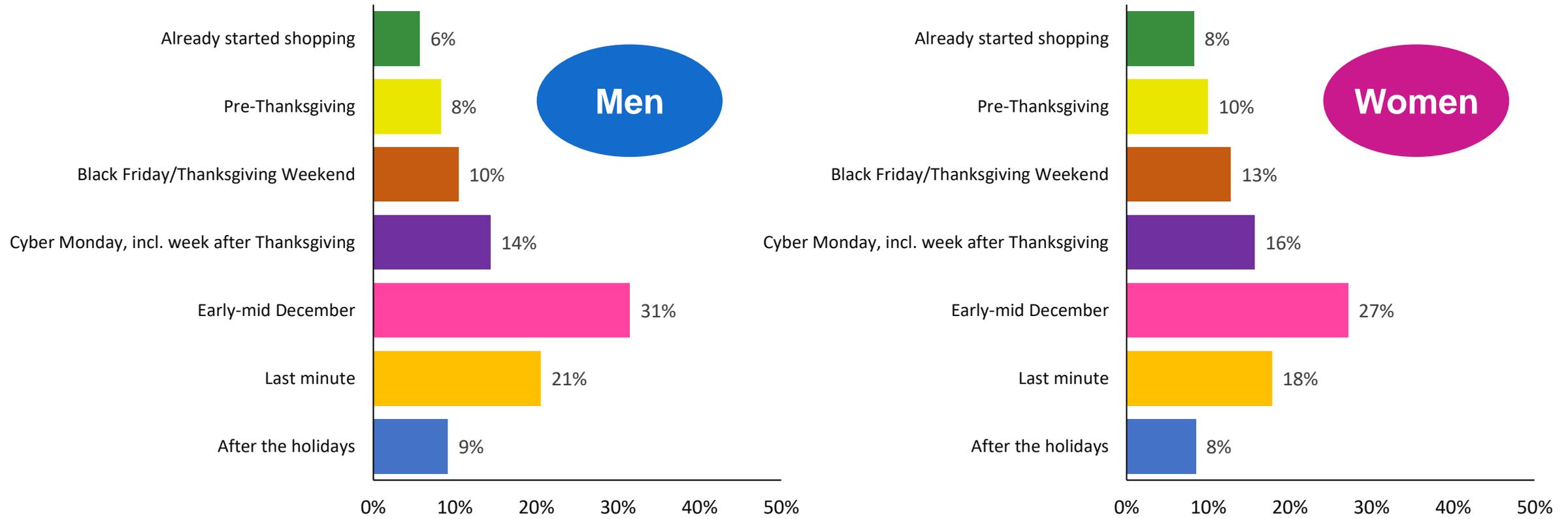
While Much Spending This Holiday Season Will Take Place in December, Many Will Start Shopping Earlier

% of Planned Total Spending This Holiday Season (In-Person/Online, for Self or Others) Expected To Happen During Each Time Period



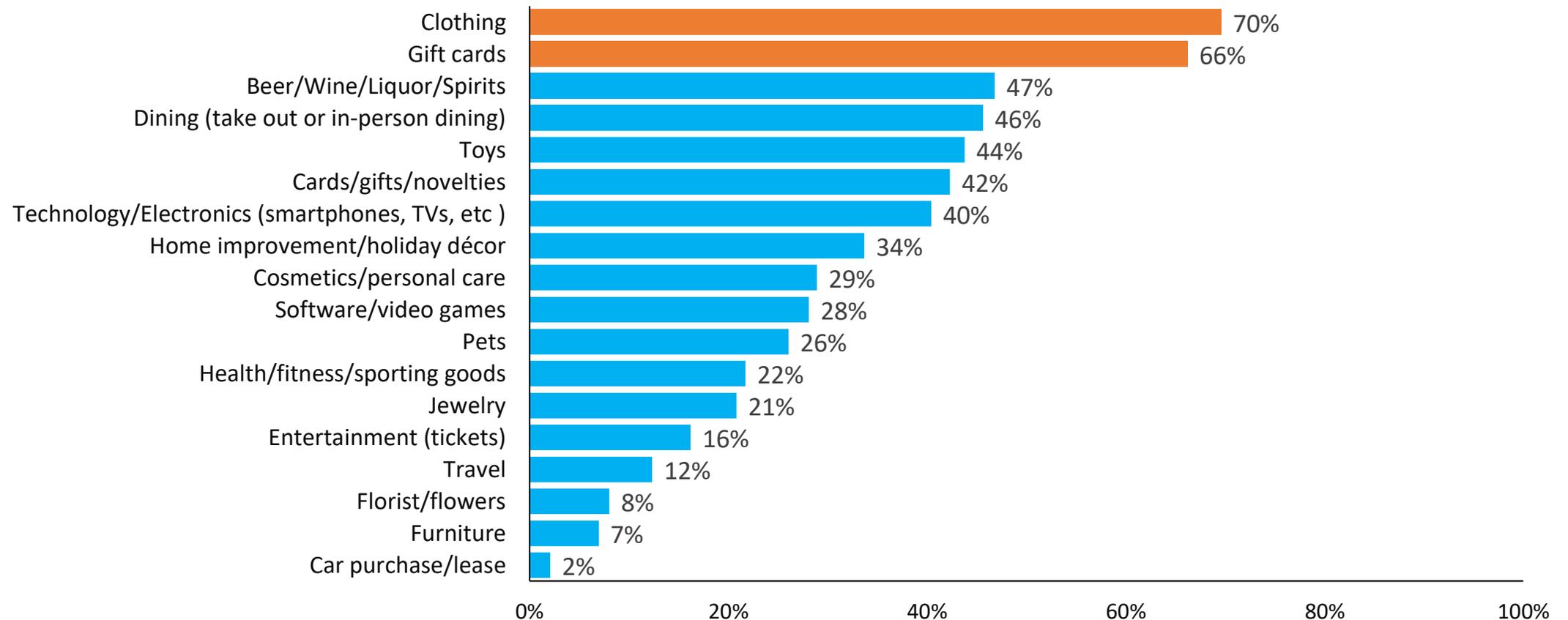
Men Are More Likely to Delay Their Holiday Shopping to December – or At the Last Minute

% of Planned Total Spending This Holiday Season (In-Person/Online, for Self or Others)
Expected To Happen During Each Time Period

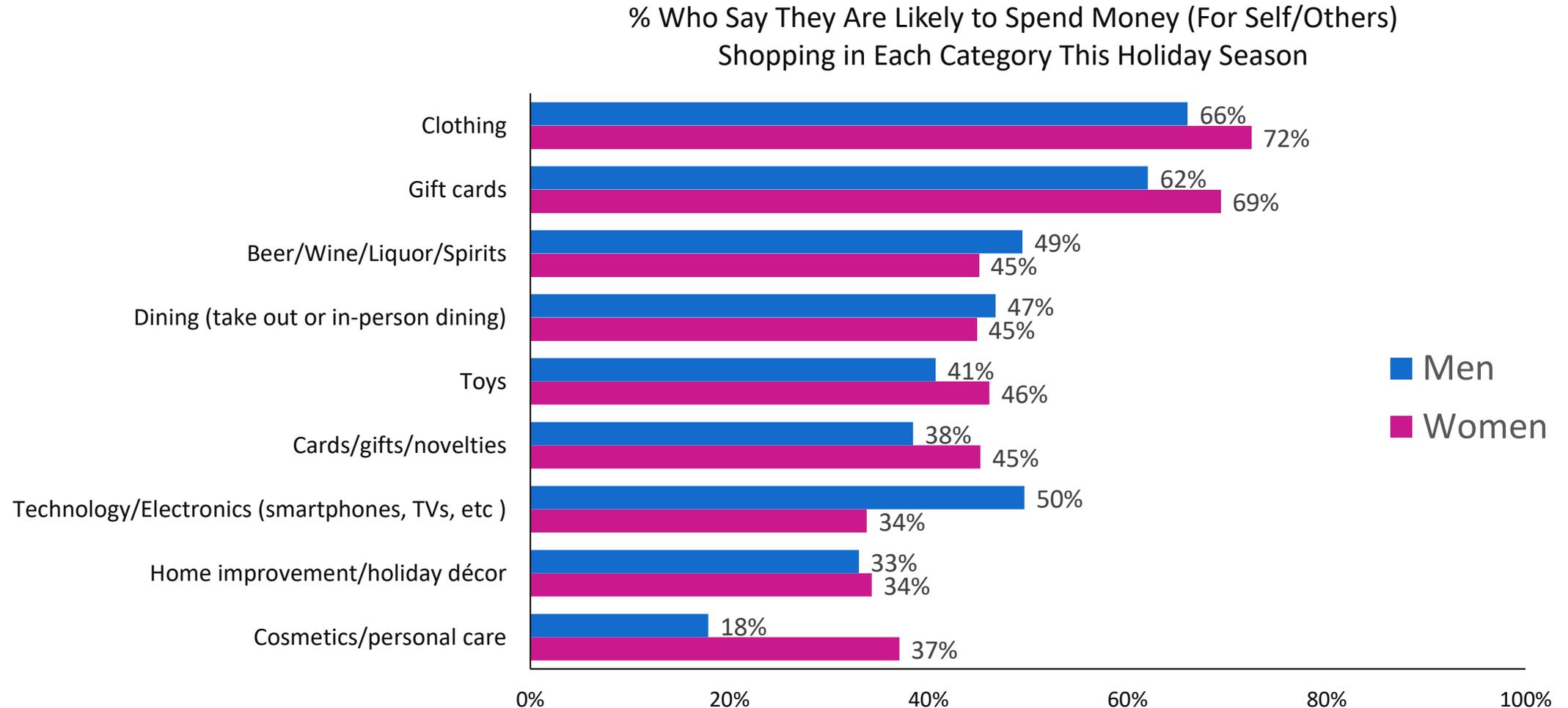


Clothing and Gift Cards Are the Two Biggest Holiday Spending Categories (of Those Tested)

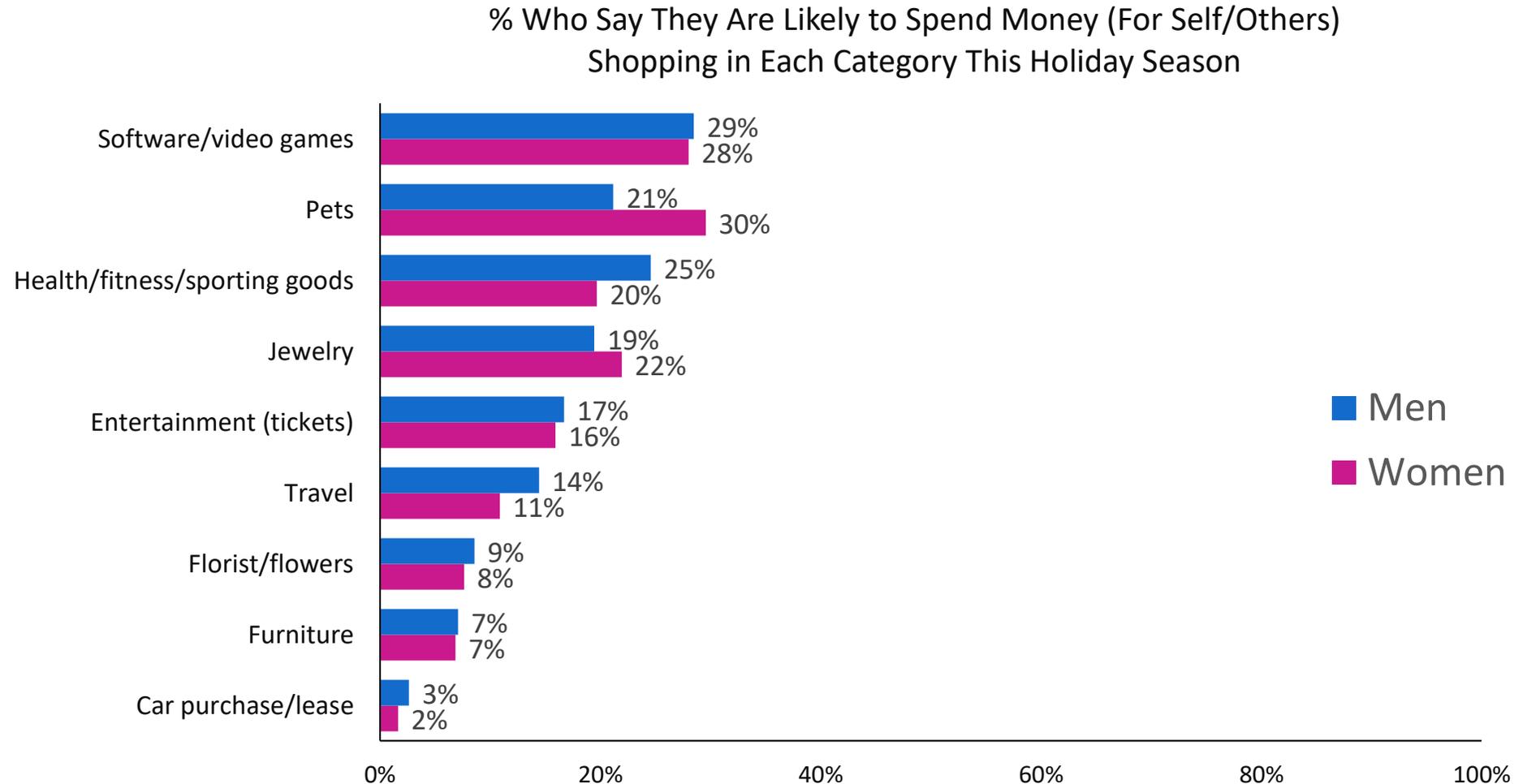
% Who Say They Are Likely to Spend Money (For Self/Others)
Shopping in Each Category This Holiday Season



Women Plan On Spending More On Clothing and Gift Cards, While Men Are Likely to Purchase Electronics

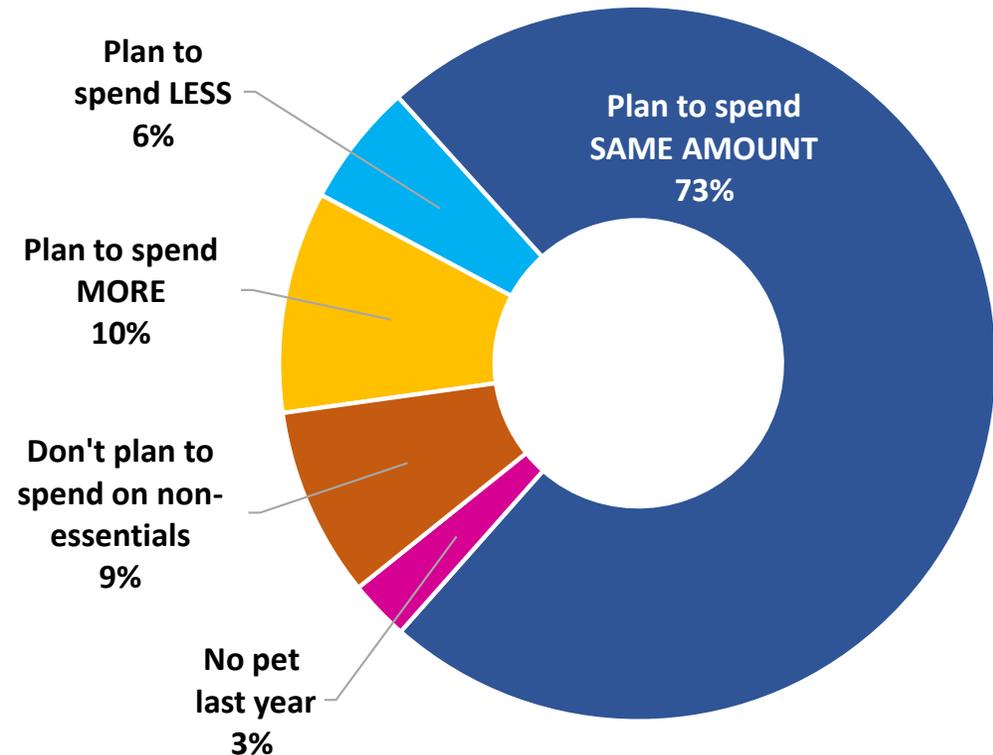
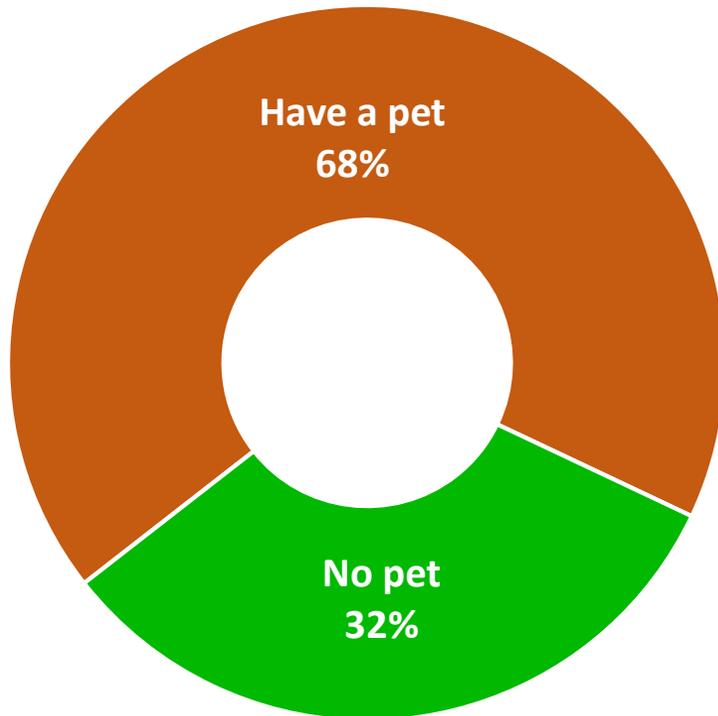


At Lower Levels, Women Plan to Spend More On Pet(s), While Men Say They'll Buy Health, Fitness, Sporting Goods



Two in Three Households Have a Pet; Most Expect to Spend the Same Amount on Them This Holiday Season

“Compared to one year ago, and other than spending on essentials like food and healthcare, which of the following best describes your anticipated spending on your pet(s) during this holiday season?”

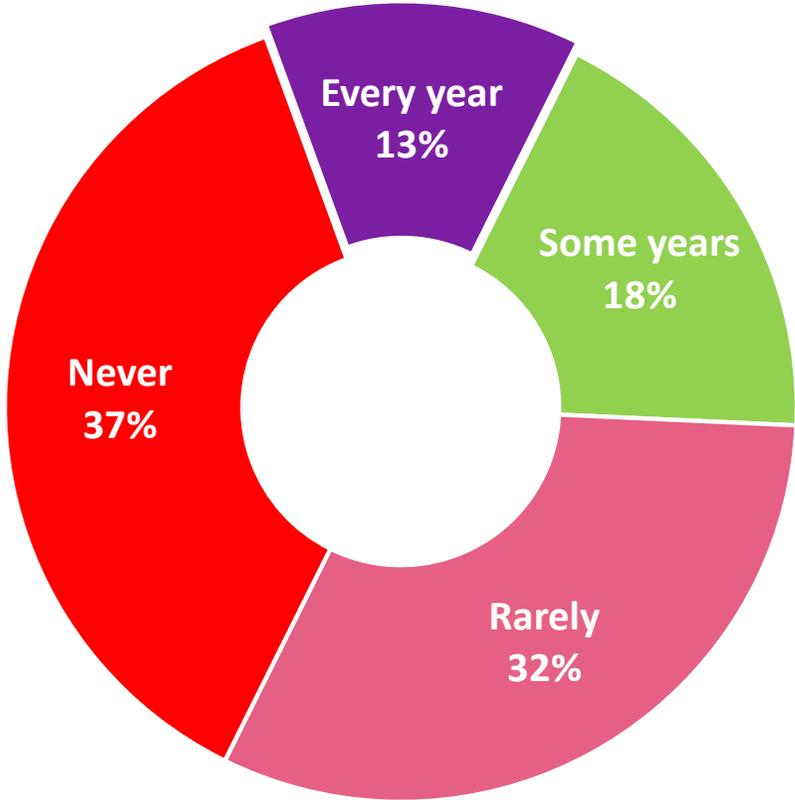


Among Pet Owners

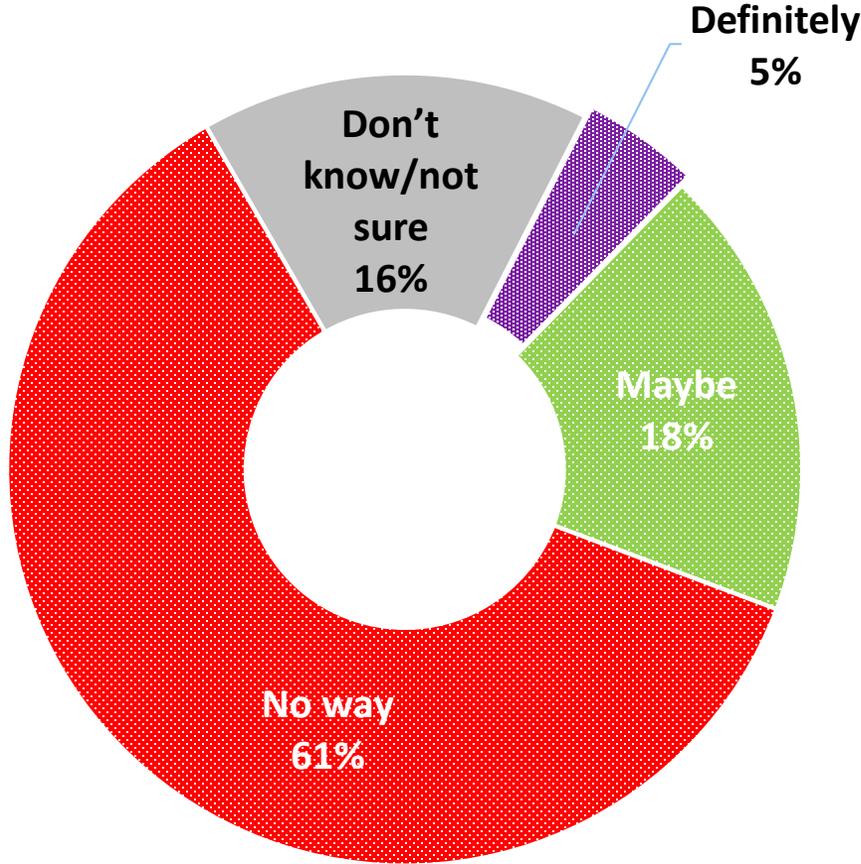


Black Friday & Cyber Monday Shopping

Fewer Currently Plan to Shop In Stores on Black Friday 2020 Than Normal

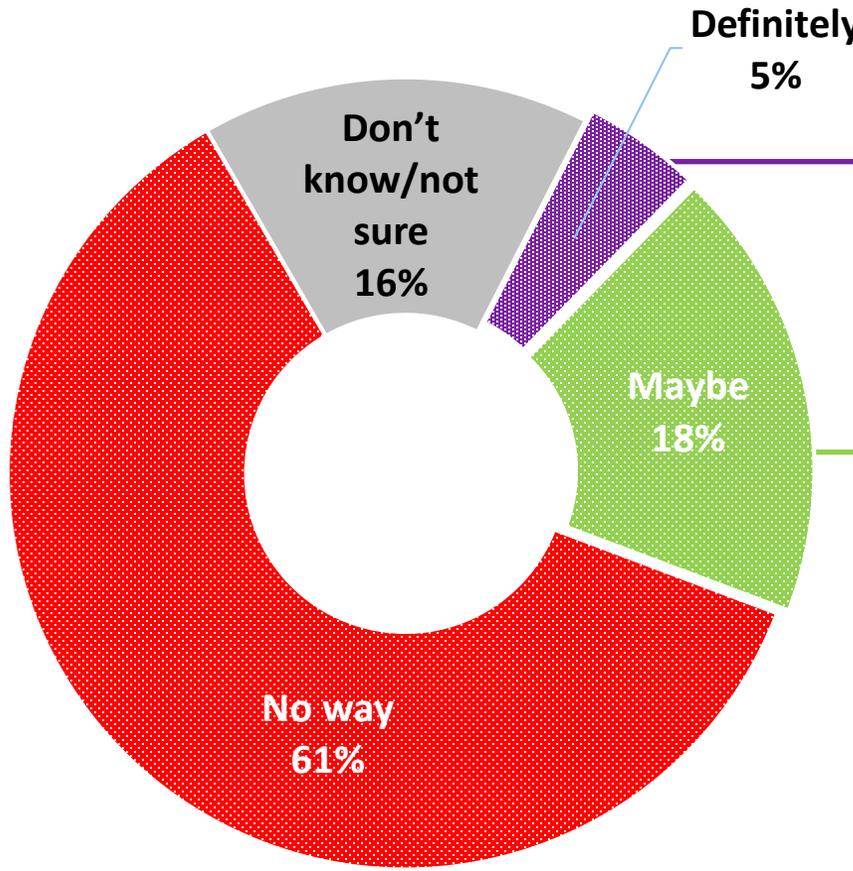


“How often do you normally shop IN-PERSON at stores on Black Friday?”



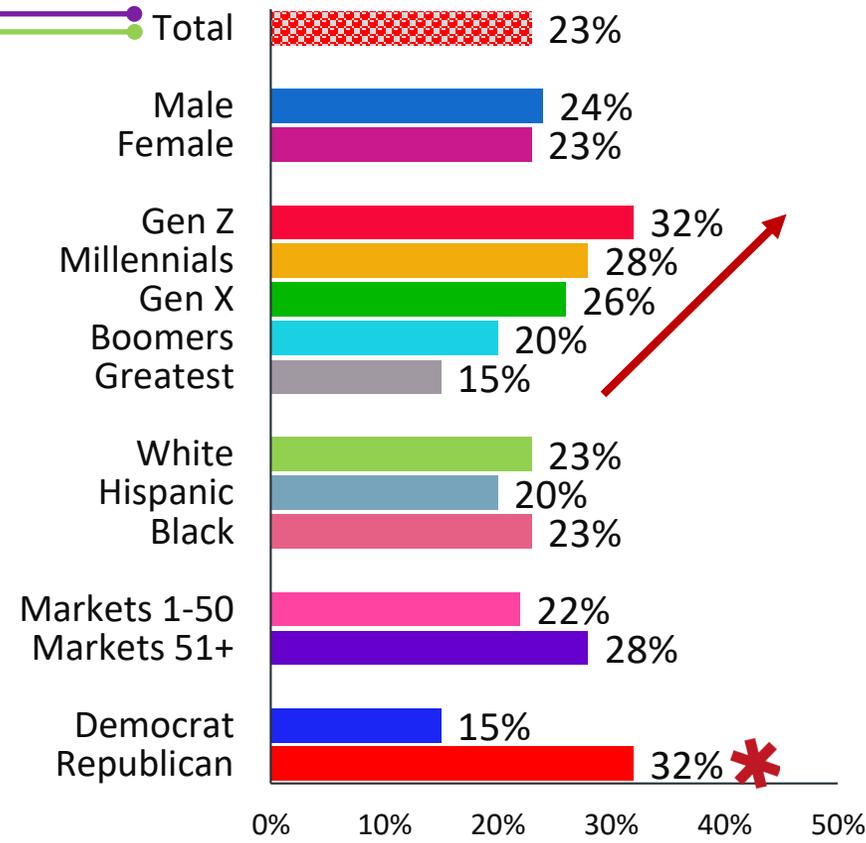
“Do you plan on shopping IN-PERSON at stores on Black Friday this year?”

About One in Four Says They'll Definitely/Might Shop In Stores on Black Friday, Led by Progressively Younger Generations

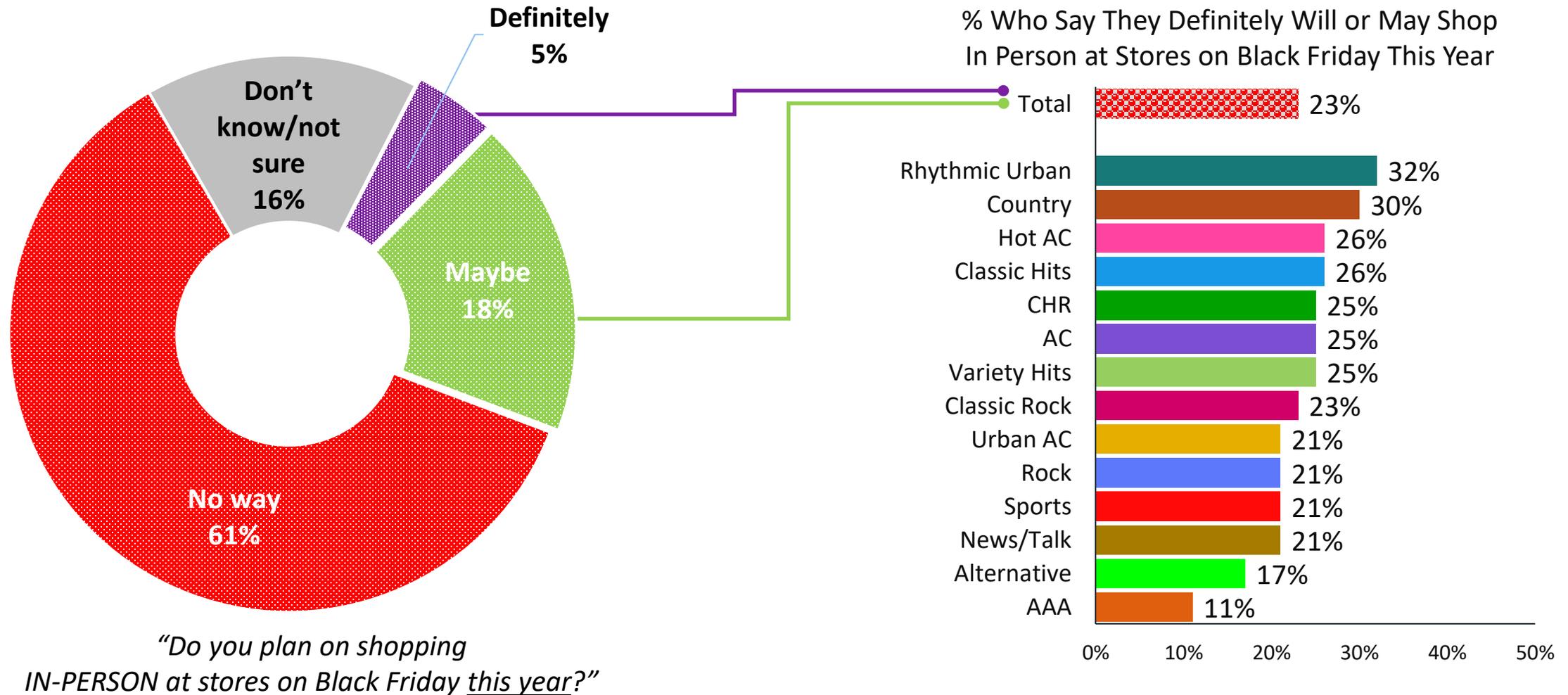


“Do you plan on shopping **IN-PERSON** at stores on Black Friday this year?”

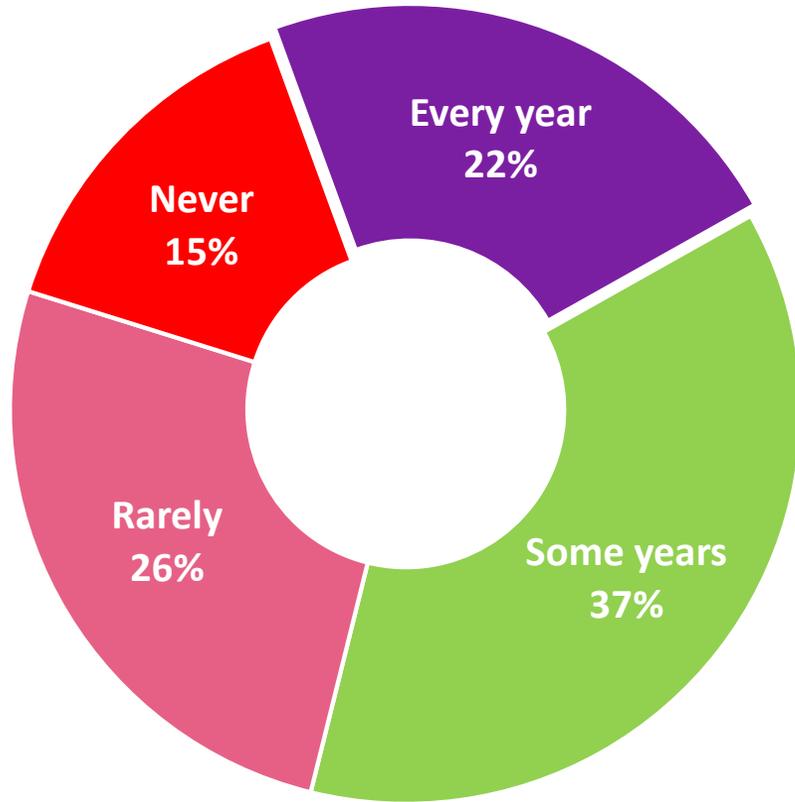
% Who Say They Definitely Will or May Shop In Person at Stores on Black Friday This Year



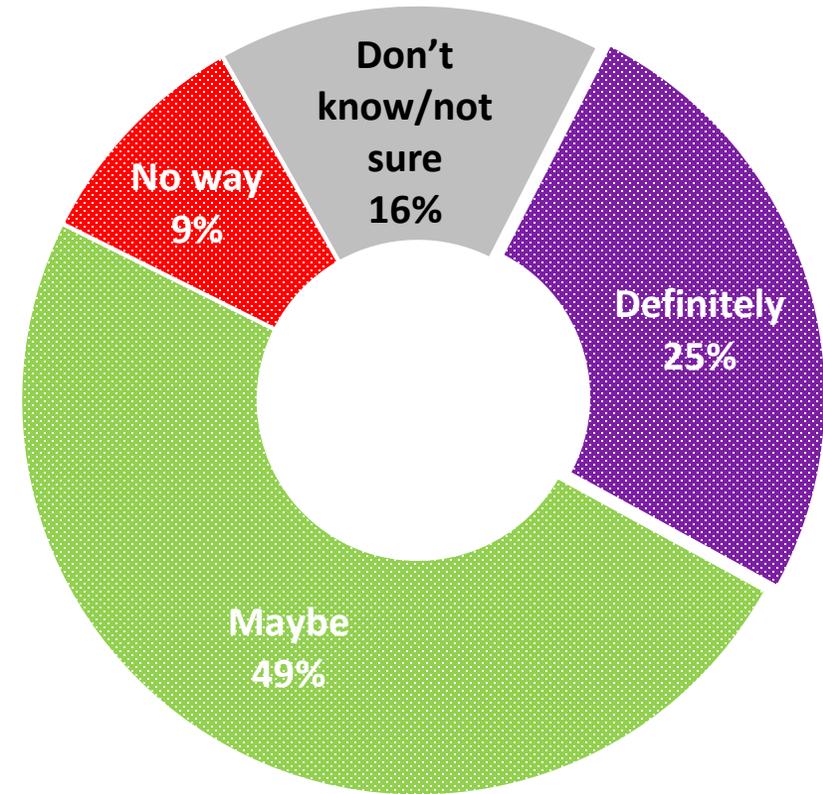
Rhythmic Urban and Country Fans Are Most Likely to Say They Definitely Will/Might Shop in Stores on Black Friday



One in Four Plans to Shop Online on Cyber Monday (and Later That Week), Similar to Past Years

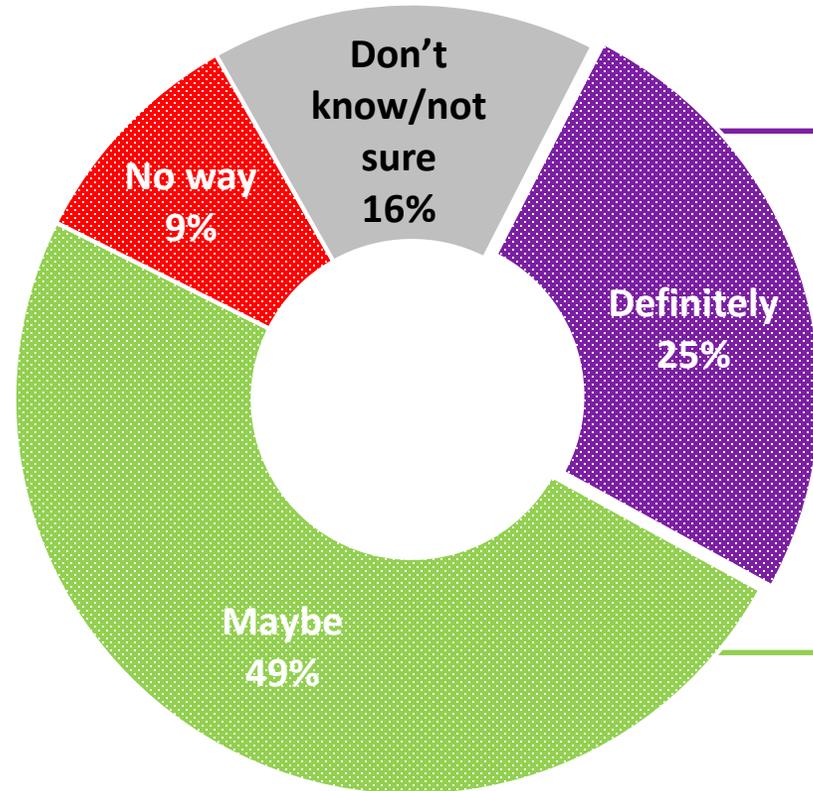


“How often do you normally shop ONLINE on Cyber Monday (the first Monday after Black Friday)?”



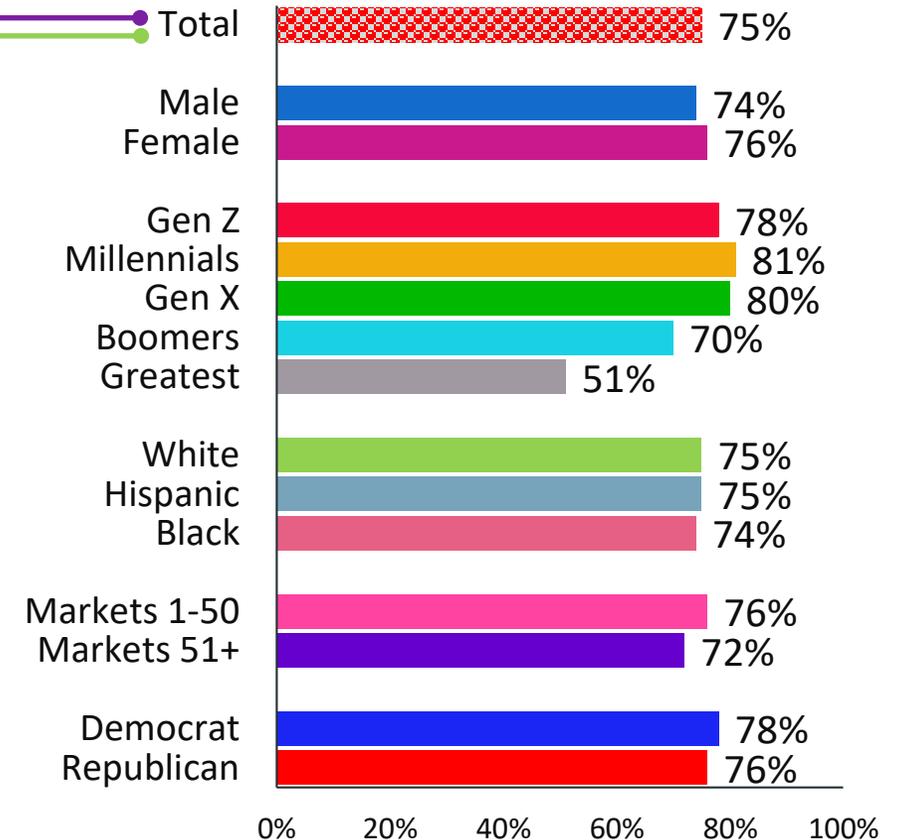
“Do you plan on shopping ONLINE on Cyber Monday (and later that week) this year?”

With the Exception of Those in the “Greatest Generation,” Most Say They’ll Shop Online This Cyber Monday



“Do you plan on shopping ONLINE on Cyber Monday (and later that week) this year?”

% Who Say They Definitely Will or May Shop Online on Cyber Monday This Year (or Later That Week)

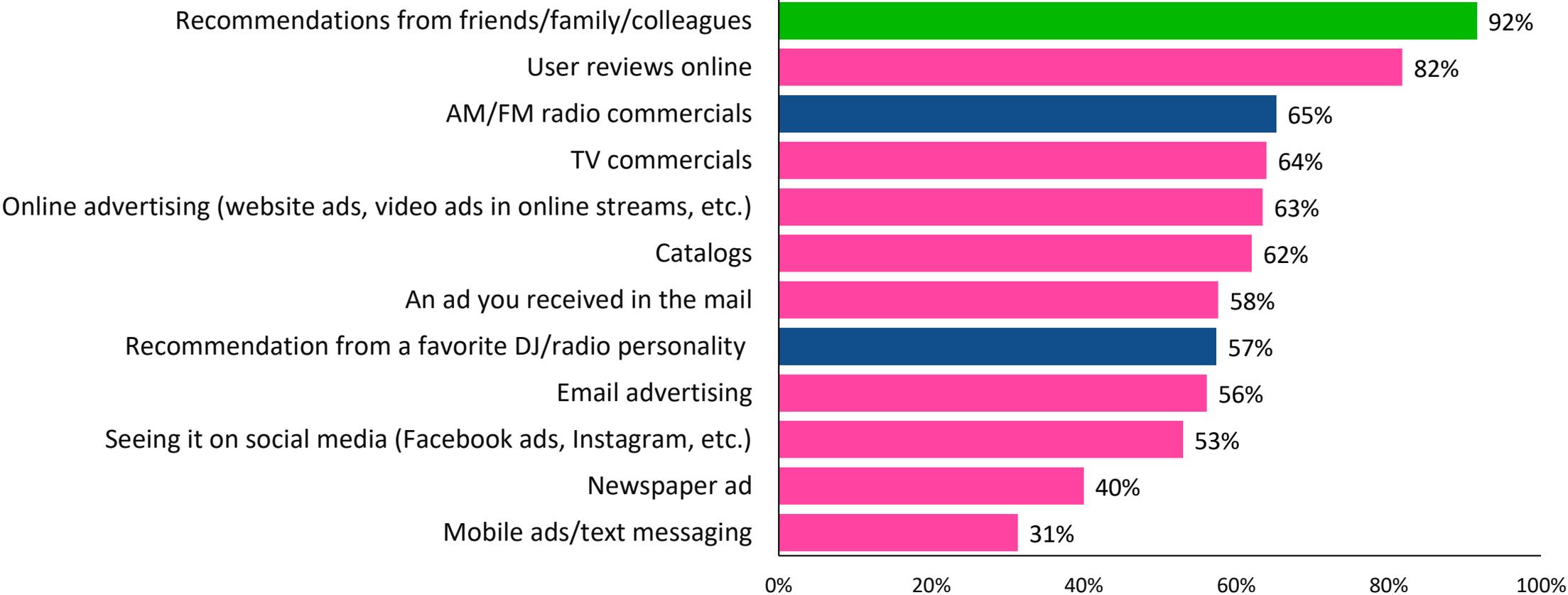




Influencing Holiday Purchases

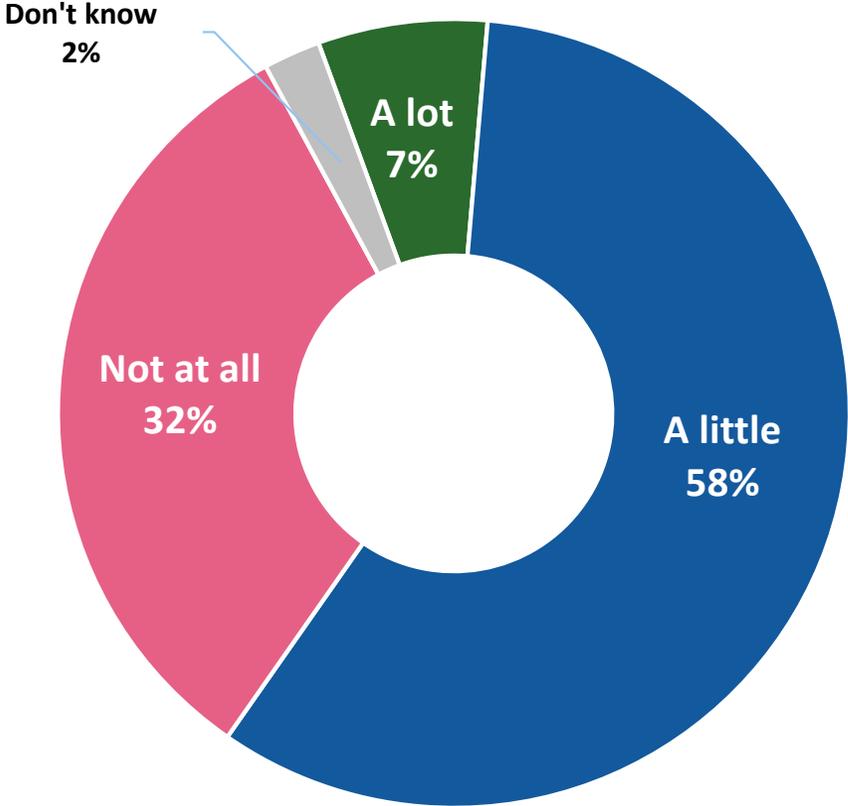
Friends/Family Recommendations and Online User Reviews Lead Influence on Purchase Decisions, With Radio Commercials Highest Among Next Tier

% Who Say Each Influences Their Purchase Decisions “A Lot” or “A Little”



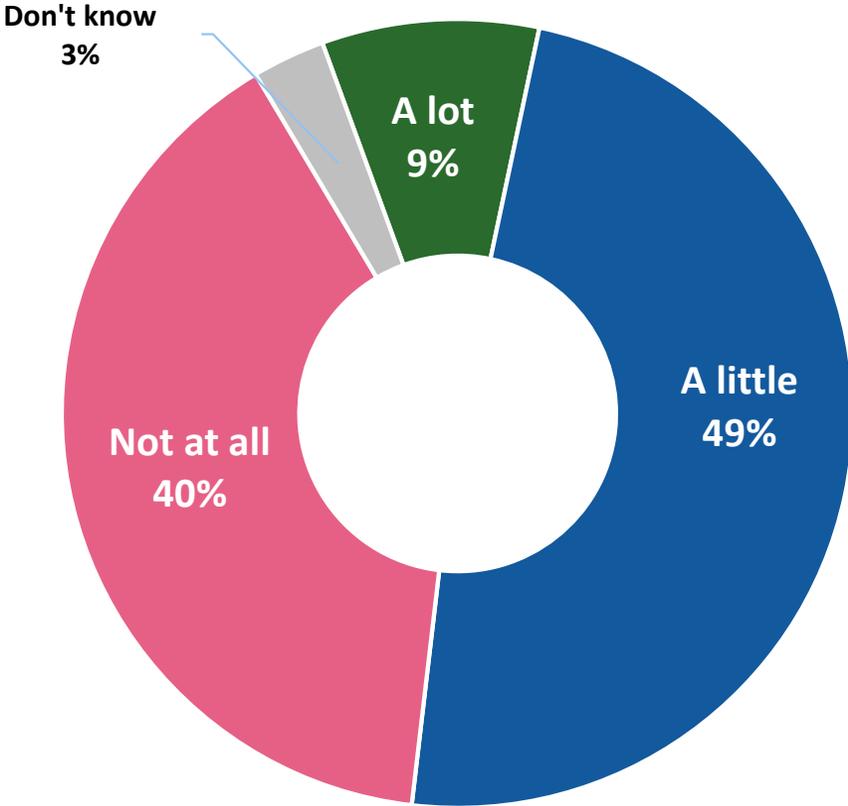
Radio's Influence on Purchase Decisions

Radio Commercials



“How much do...AM/FM radio commercials... typically influence your purchase decisions?”

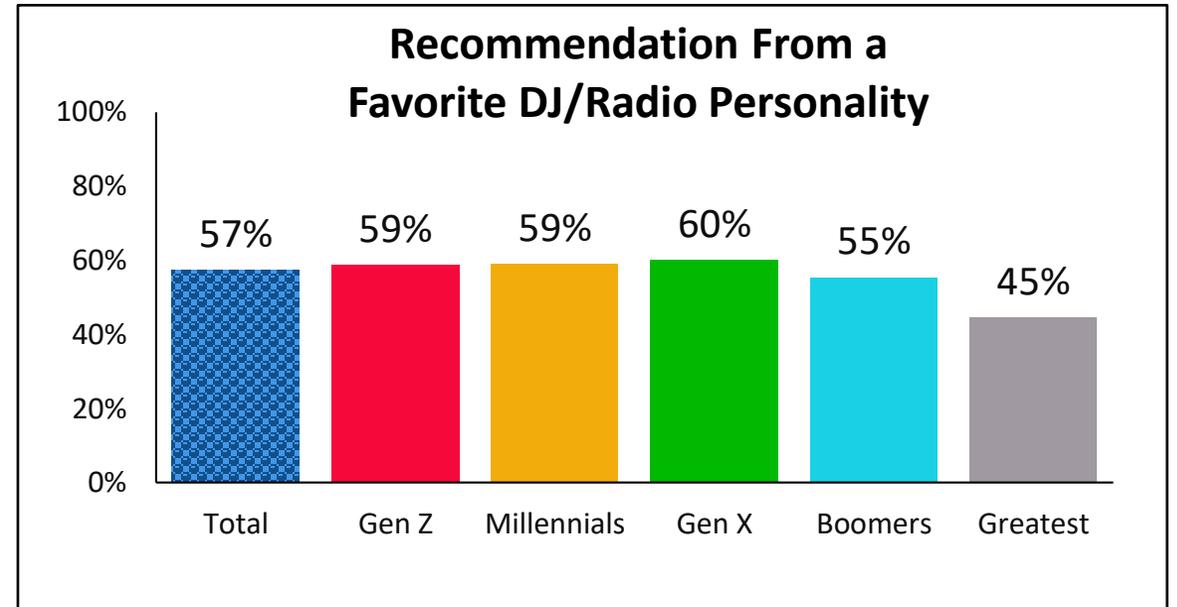
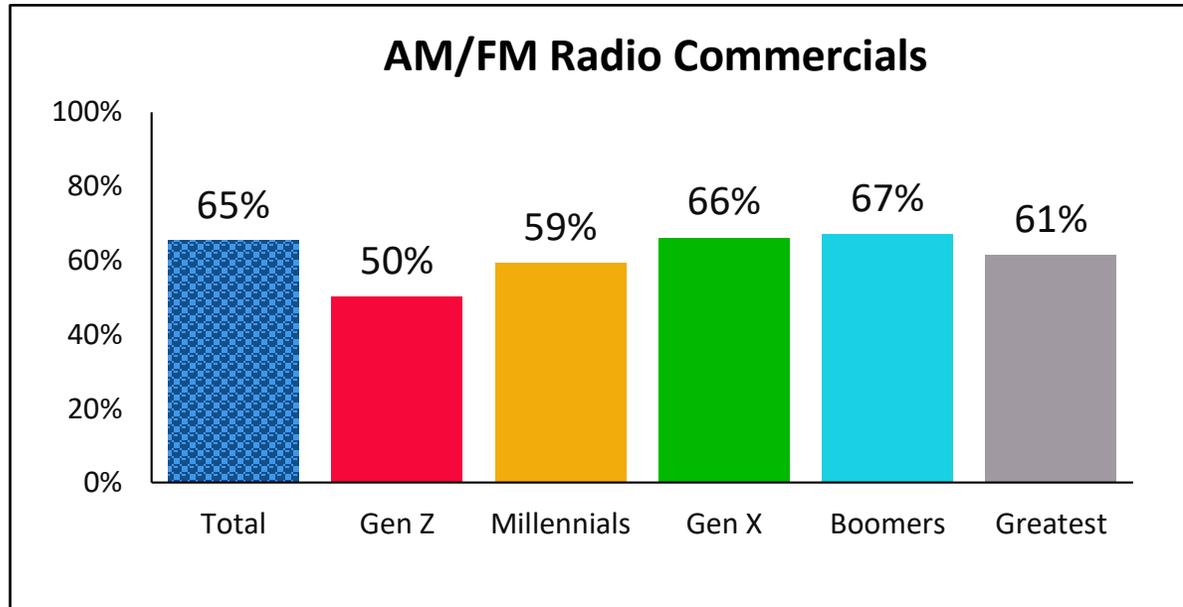
Personality Live Reads



“How much does...a recommendation from a favorite DJ/radio personality... typically influence your purchase decisions?”

Radio's Influence on Purchase Decisions

% By Generation Who Say Each Influences Their Purchase Decisions

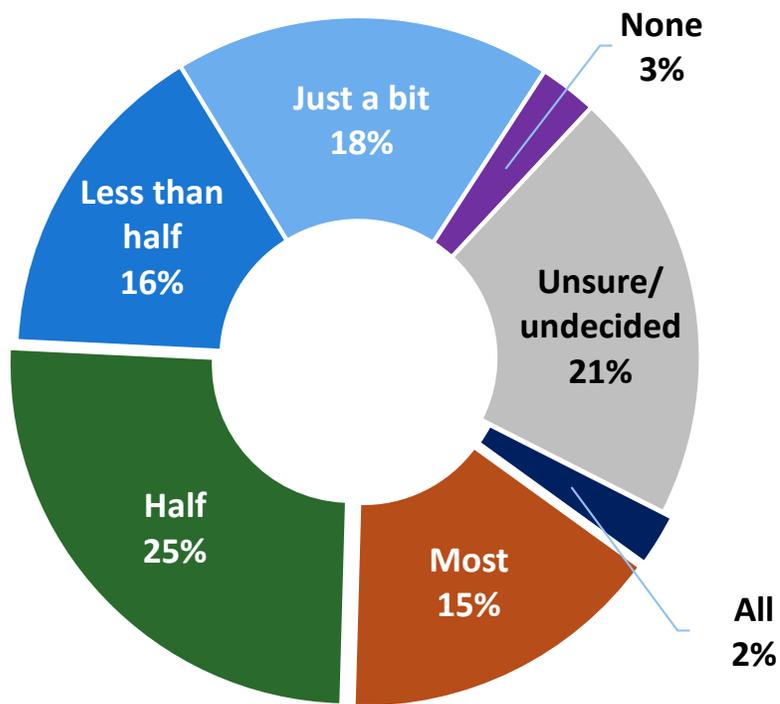


Among Those Who Say **AM/FM Radio Commercials** Typically Influence Their Purchase Decisions "A Lot" or "A Little"

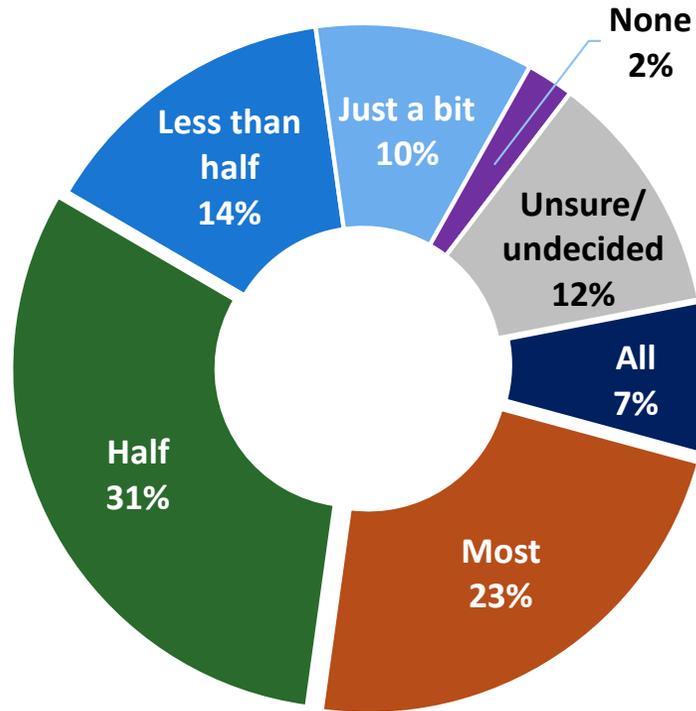
Among Those Who Say a **Recommendation from a DJ/Favorite Radio Personality** Typically Influences Their Purchase Decisions "A Lot" or "A Little"

Radio's Influence on the Decision On Shopping At Locally-Owned Stores

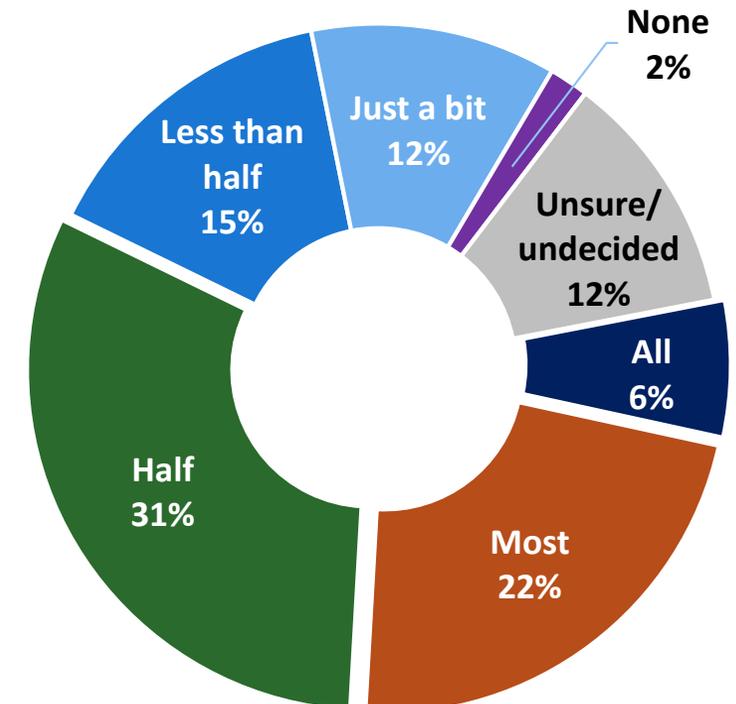
% of Expected Holiday Shopping This Year (In-Person or Online) That Will Be From Locally-Owned Area Stores



Among All Respondents



Among Those Who Say **AM/FM Radio Commercials** Typically Influence Their Purchase Decisions "A Lot" (7% of All Respondents)



Among Those Who Say **a Recommendation from a DJ/Favorite Radio Personality** Typically Influences Their Purchase Decisions "A Lot" (9% of All Respondents)



Takeaways & Action Steps

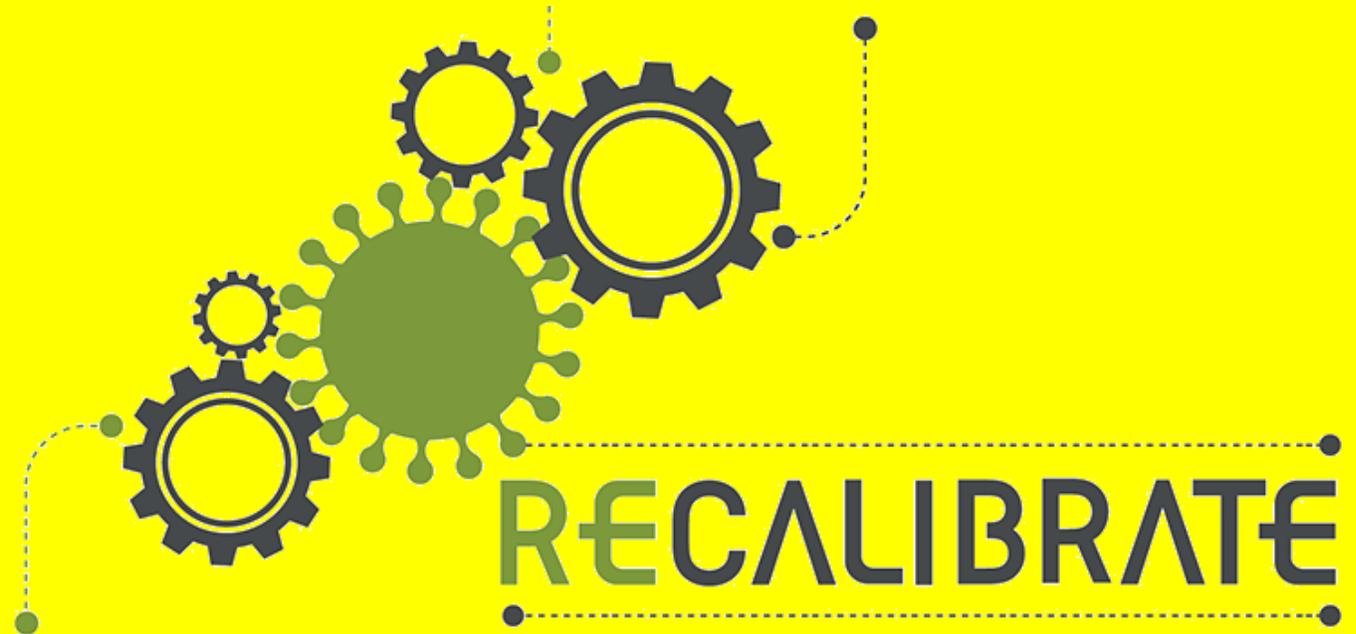
Takeaways

- 🎄 Fears about COVID & the economy are putting a damper on the holidays, including shopping & gatherings
- 🎄 Some are returning to work and spending more time in cars – a positive sign for radio
- 🎄 “Local” matters, and many intend to shop in town; radio ads & personality “reads” make a difference
- 🎄 Shopping is rapidly moving online, impacting shopping trends on Black Friday & Cyber Monday
- 🎄 The holiday shopping season is changing – pre-Thanksgiving becoming more important, signaling that businesses will need to get moving earlier than usual
- 🎄 There will be more pressure on media as spending levels are projected to go down this season
- 🎄 Women have greater concerns this holiday season, from health and safety to family welfare
- 🎄 In-store safety is key with broad support for face masks, social distancing, & other measures
- 🎄 Most are staying close to home, as travel is expected to be way off this year

Action Steps for Radio



Recalibrate Your Sales Strategy





Start Advertising Now



It's All About Safety



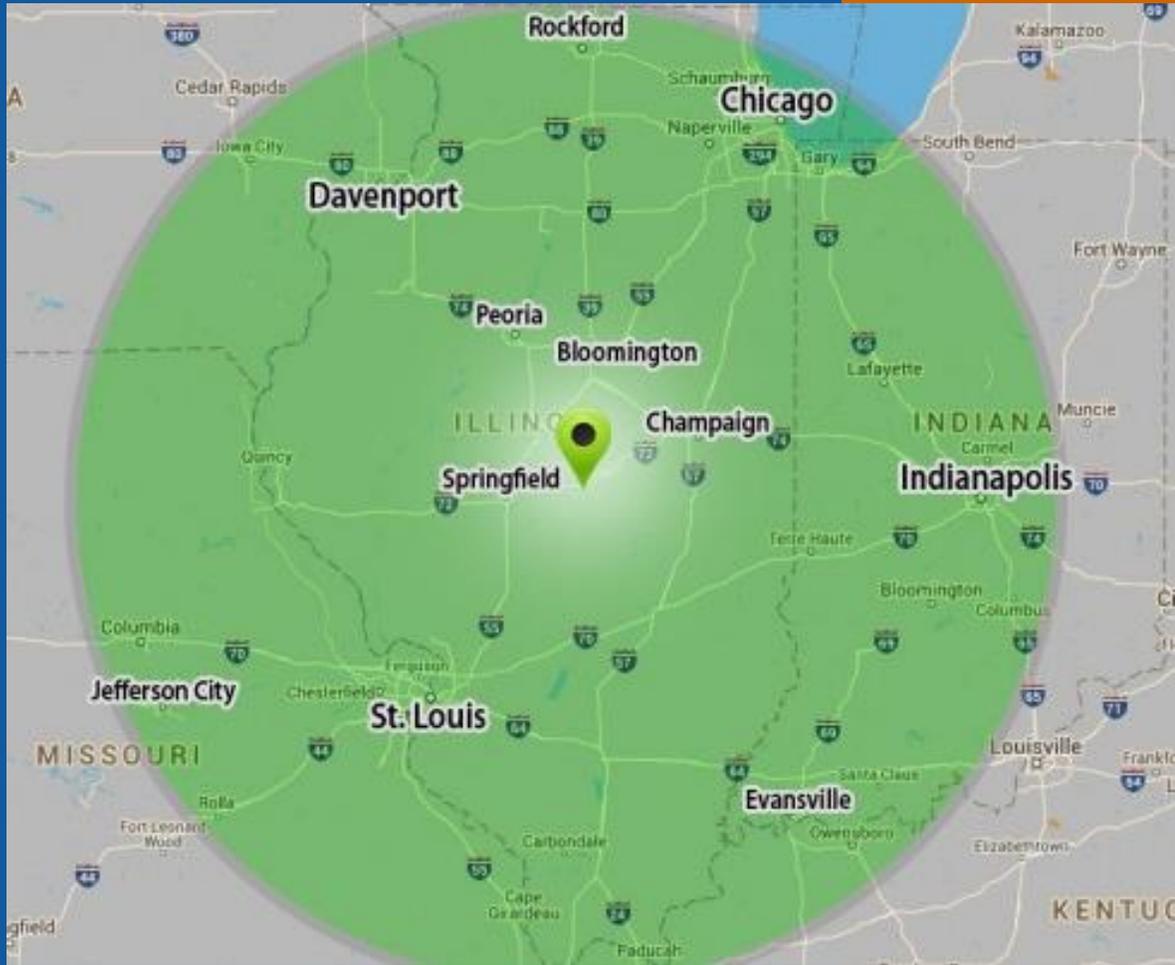
Promote COVID-19 Services



Market/Develop eCommerce Options



Champion Radio's Strengths



Target the Region



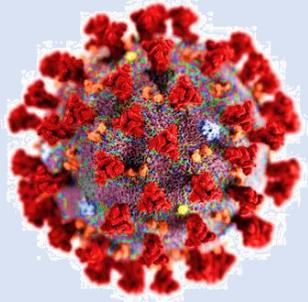
**Don't Forget
About the Pets**



Make It a
Happy Holiday

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- [@fnjacobs](#)
- [@jacobsmedia](#)
- www.jacobsmedia.com/blog



Radio's 2020 Holiday Road Map

JACOBS MEDIA
COVID-19
SURVEY 3

Jacobs
media strategies

RAB RADIO
ADVERTISING
BUREAU

October 2020