

Radio's Pathway Through the Pandemic

JACOBS MEDIA
COVID-19
SURVEY 2

Jacobs
media strategies

**Commercial
Radio**

May 2020

Methodology

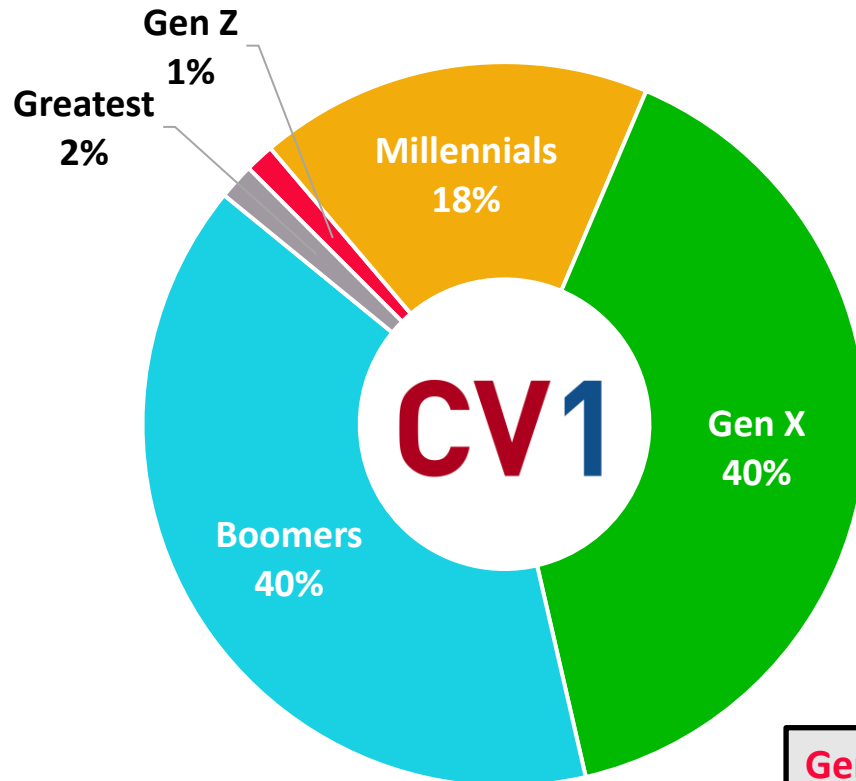
- 98 commercial radio stations in the United States and Canada
 - Separate Public Radio and Christian Music Radio surveys also fielded concurrently
- N = 16,004
- Interview dates: May 12-14, 2020 – a “snapshot” of this point in time
 - Follow-up to CV1 Radio survey conducted March 31-April 2, 2020
- Most respondents are members of radio station databases. Some responses were gathered via station websites and/or social media pages.
- This is an unweighted sample.
- 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.



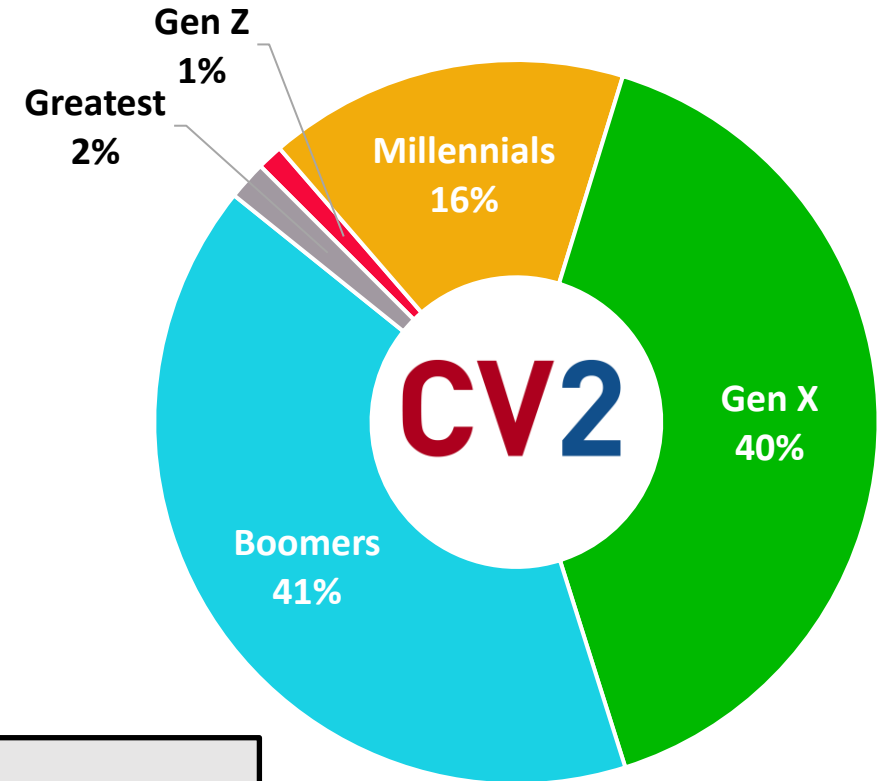
Who They Are

Who Participated? Generations

April 2020



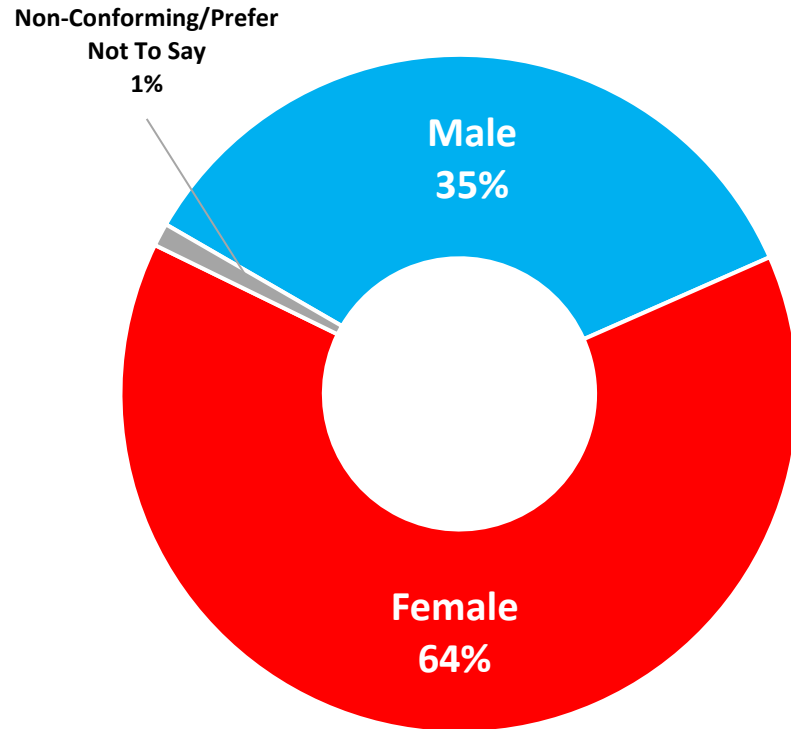
May 2020



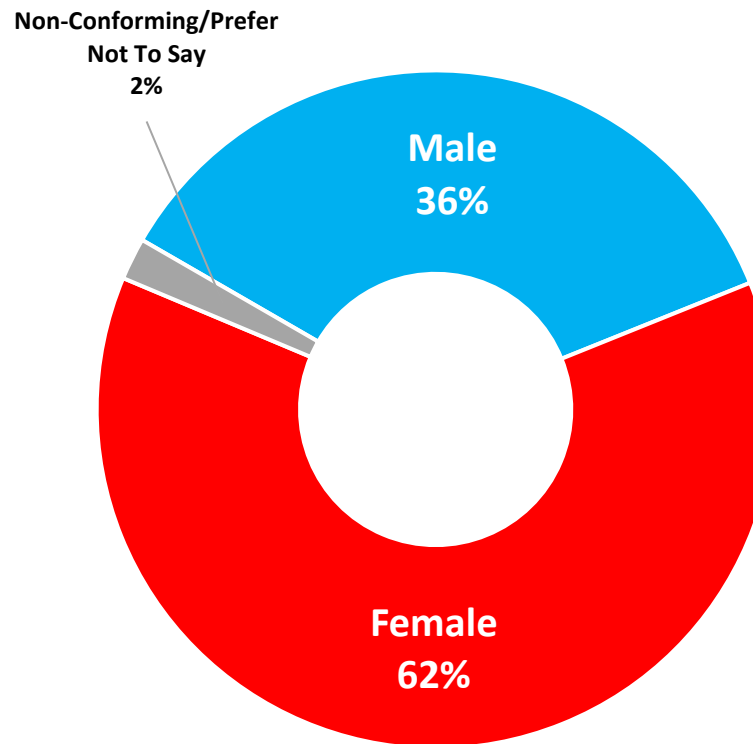
Gen Z (born after 1996)
Millennials (born between 1981-1996)
Gen X (born between 1965-1980)
Baby Boomer (born between 1946-64)
Greatest Generation (born before 1946)

Who Participated? Gender

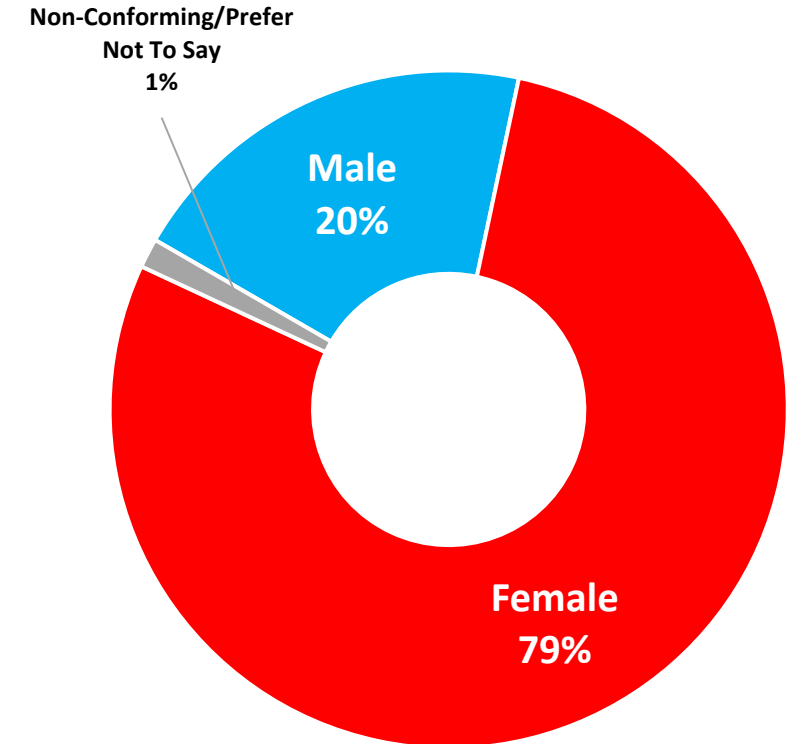
Commercial Radio



Public Radio

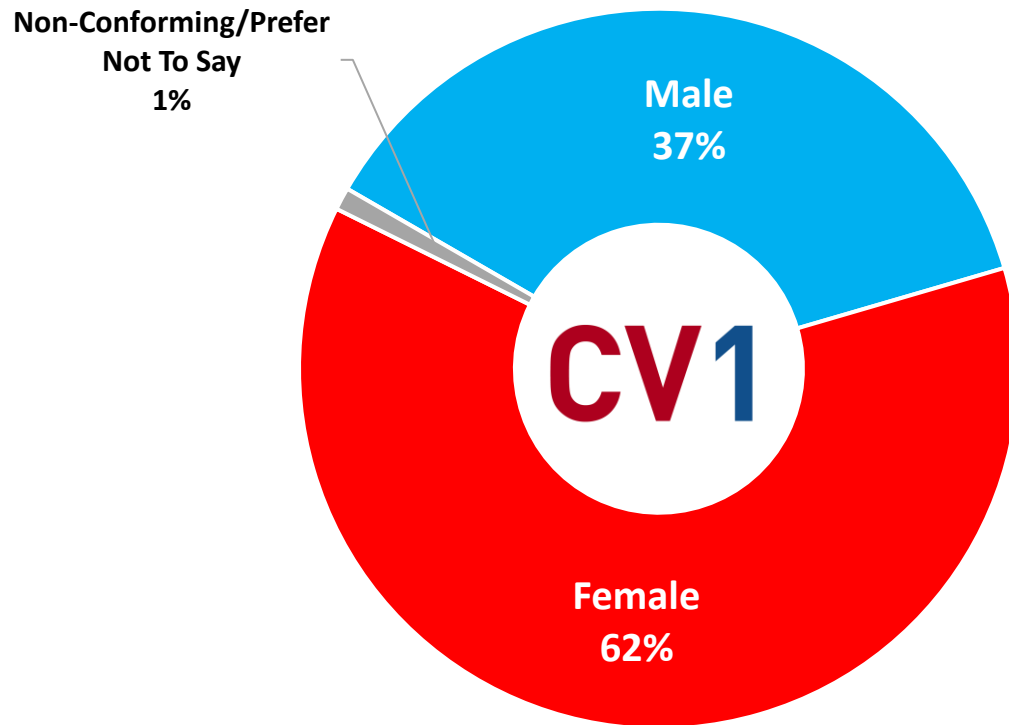


Christian Music Radio

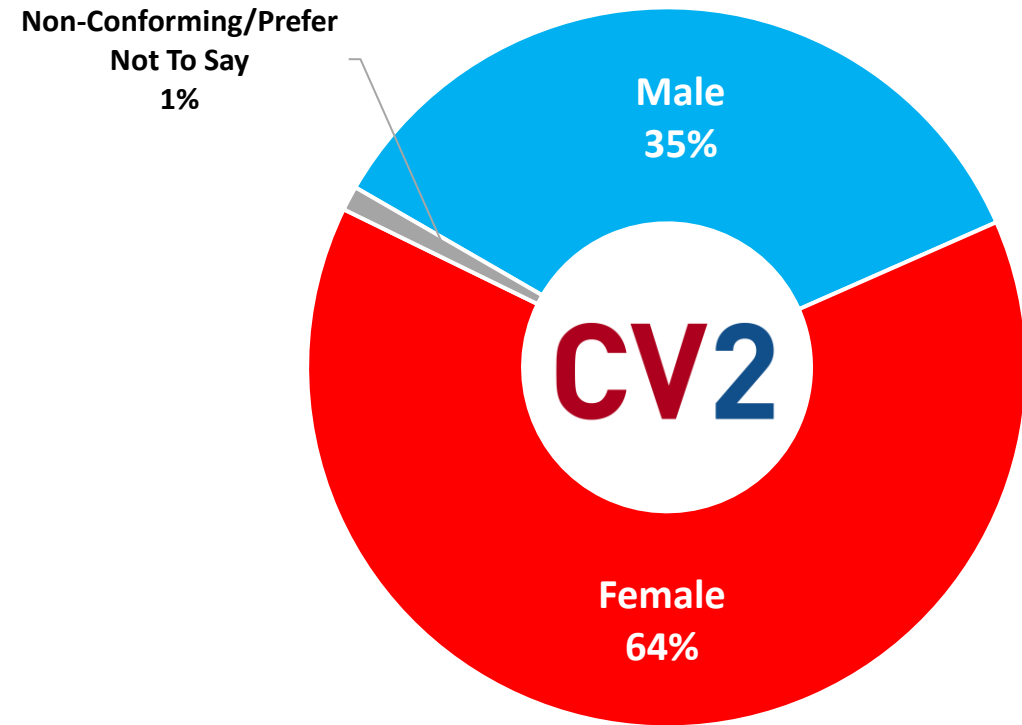


Who Participated? Gender

April 2020

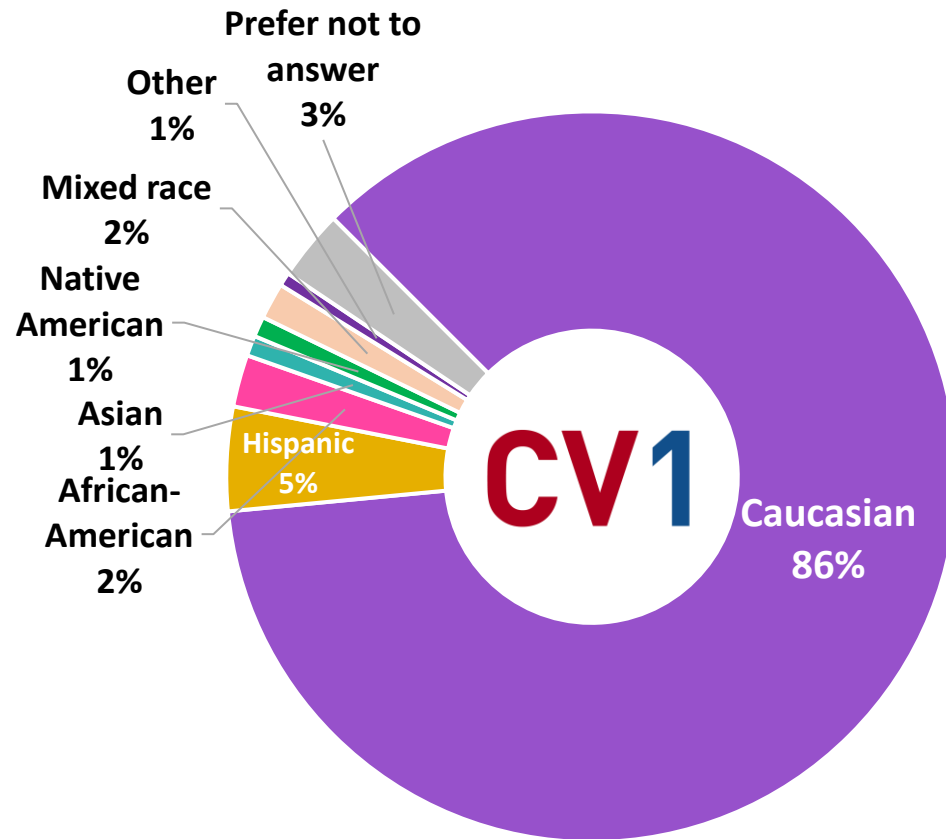


May 2020

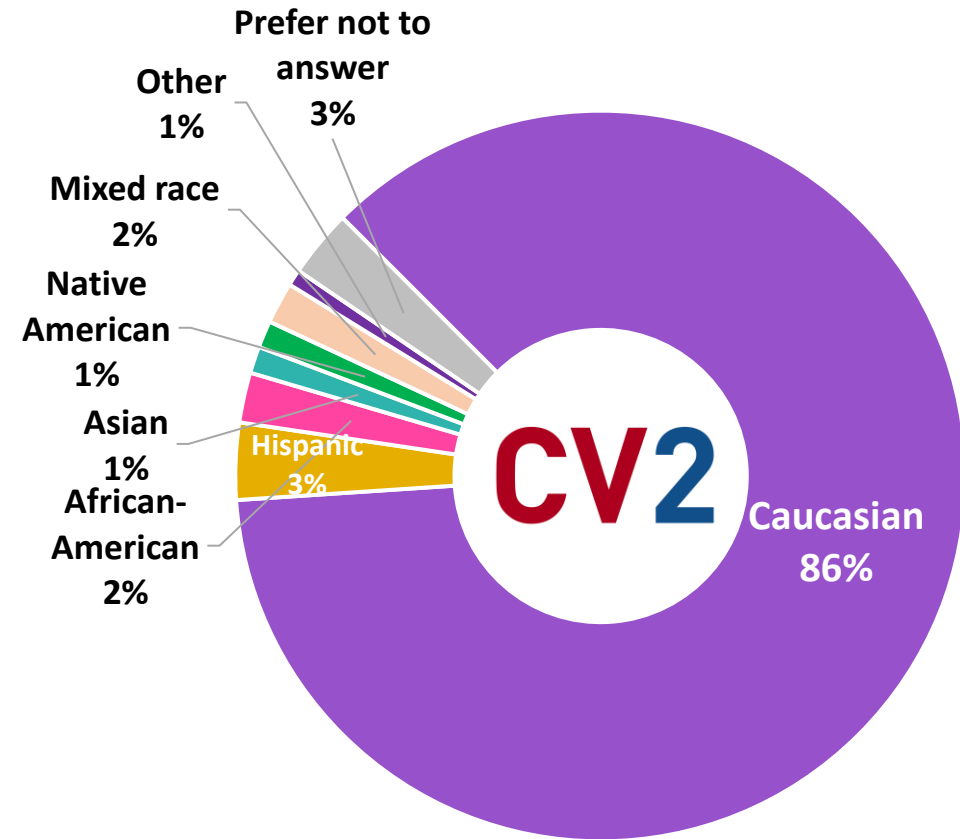


Who Participated? Ethnicity

April 2020

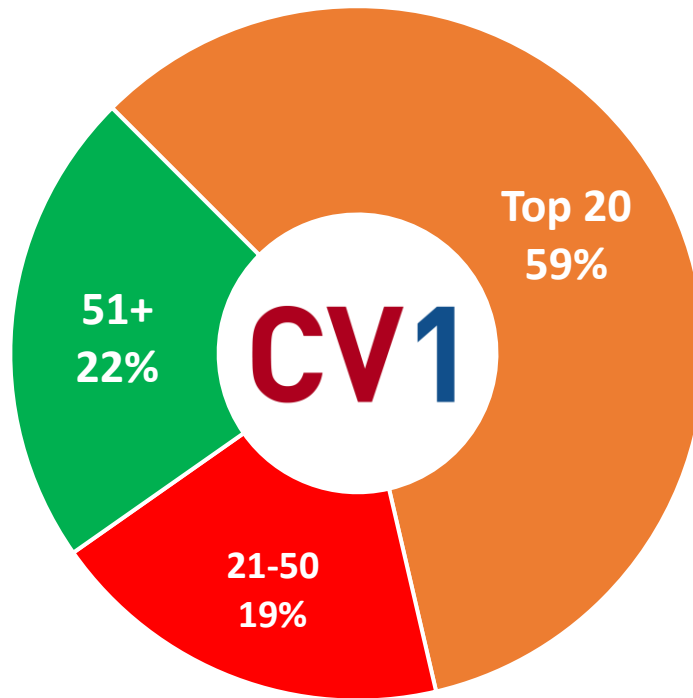


May 2020

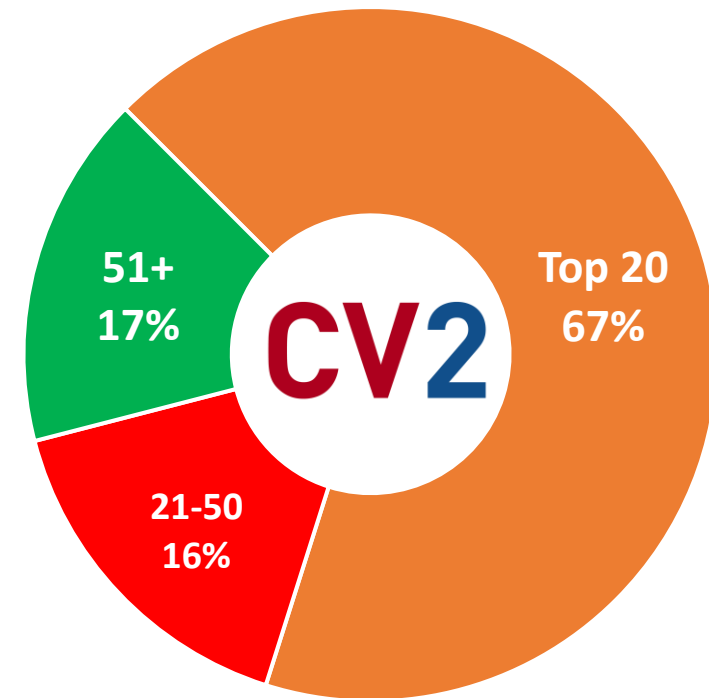


Where Do Respondents Live? Market Size

April 2020

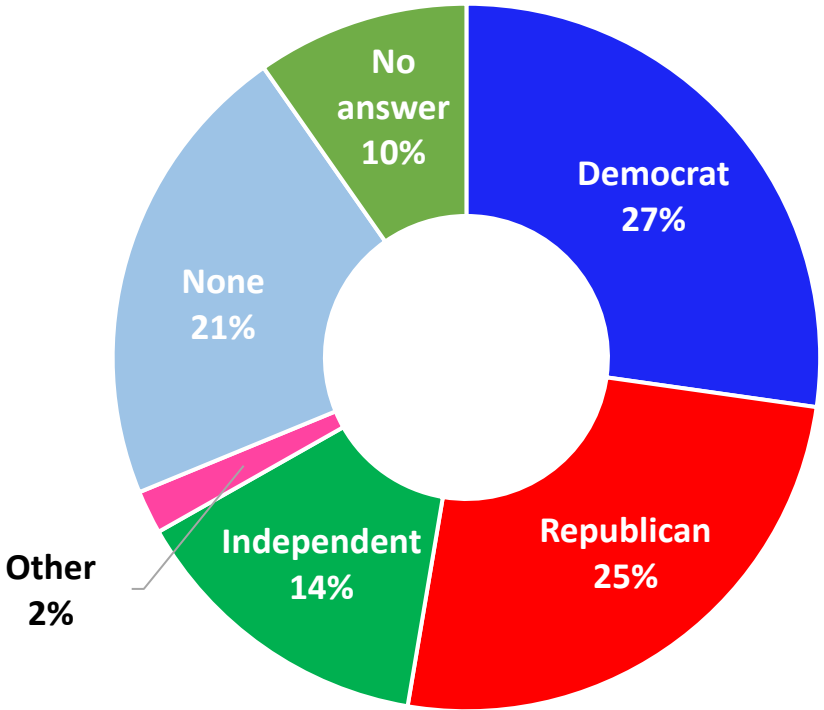


May 2020

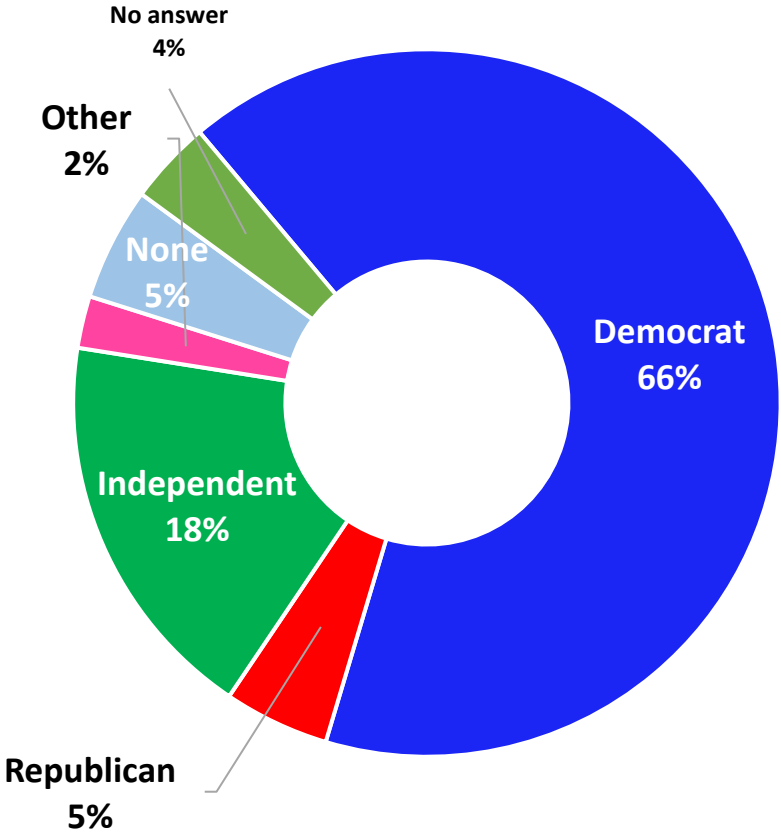


Who Participated? Political Party Preference

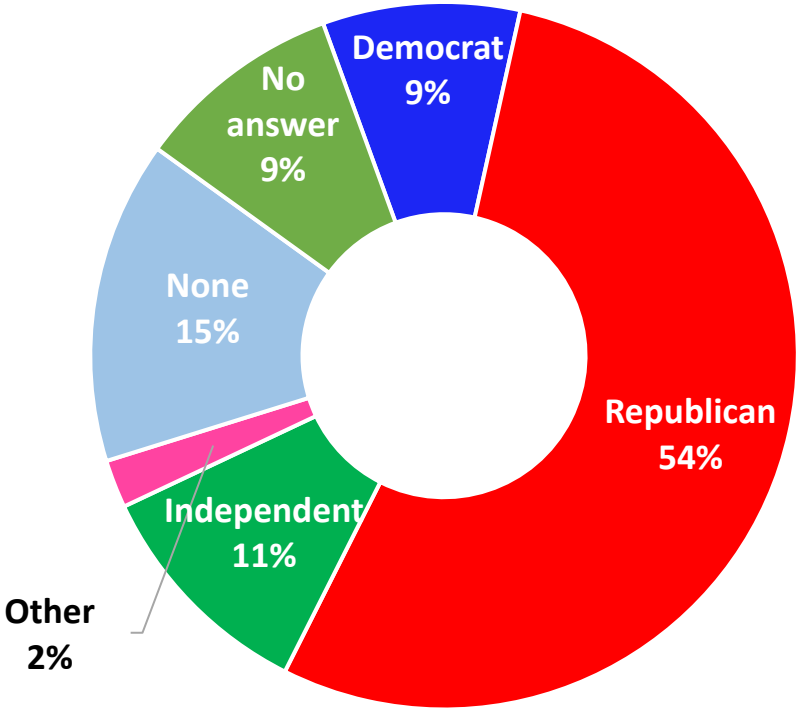
Commercial Radio



Public Radio



Christian Music Radio



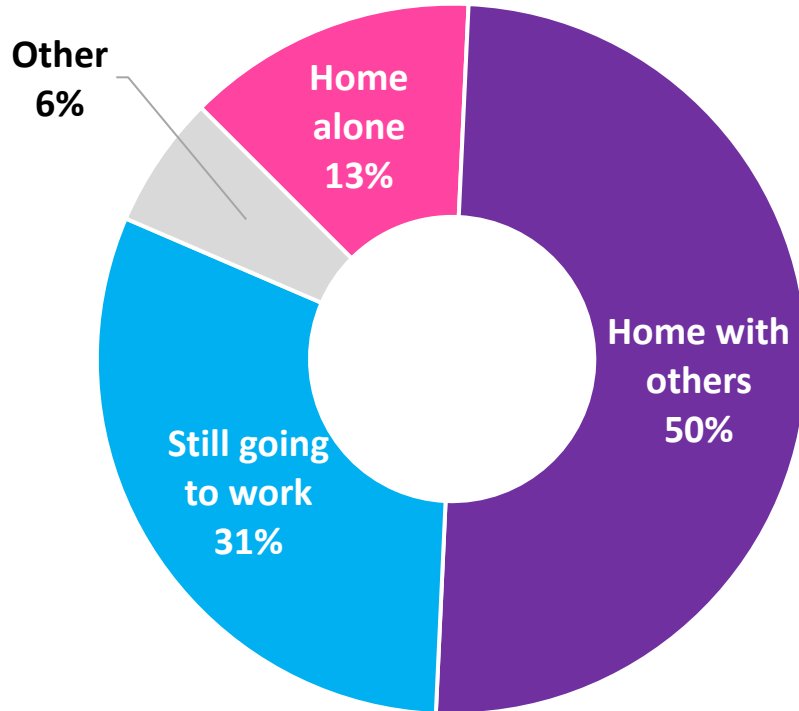
Among U.S. respondents



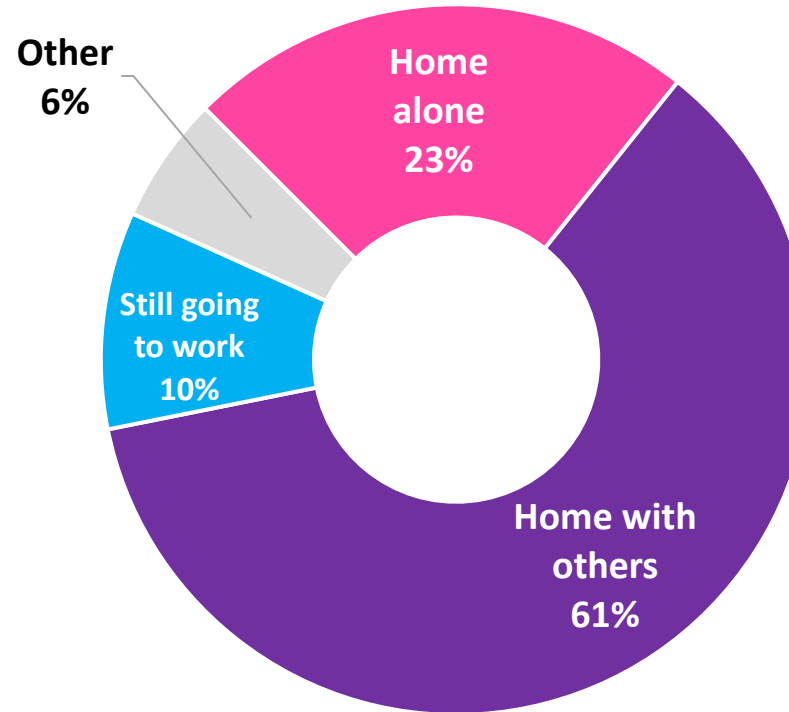
Where They Are

Nearly Two-Thirds of Commercial Radio Listeners Are At Home

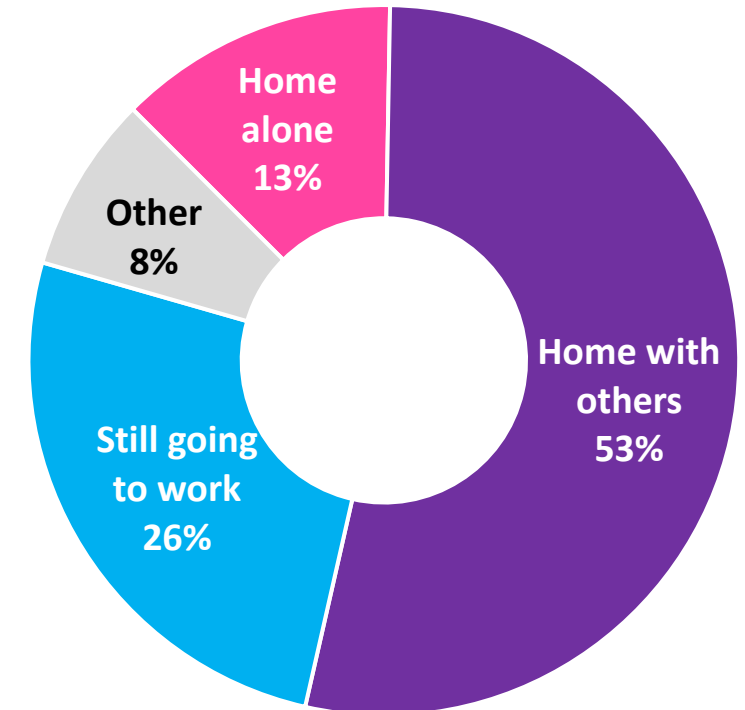
Commercial Radio



Public Radio

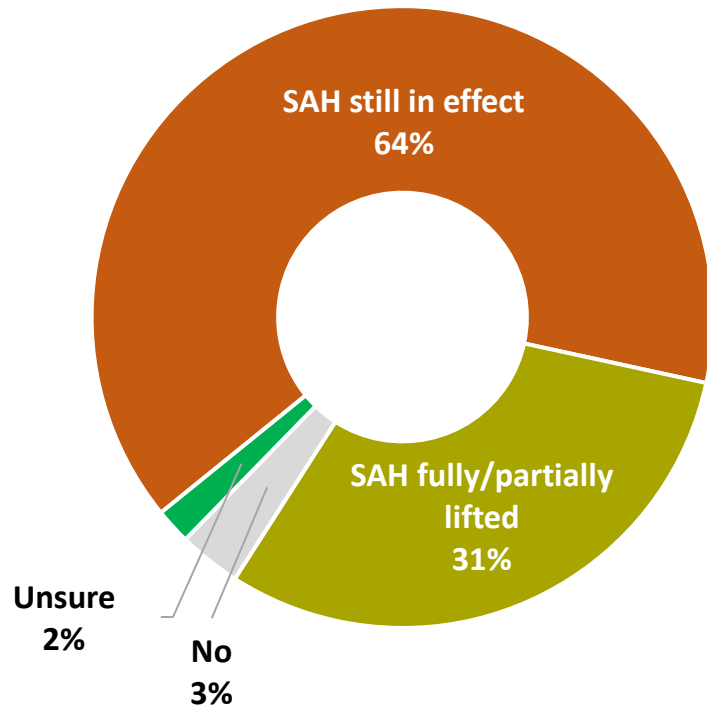


Christian Music Radio

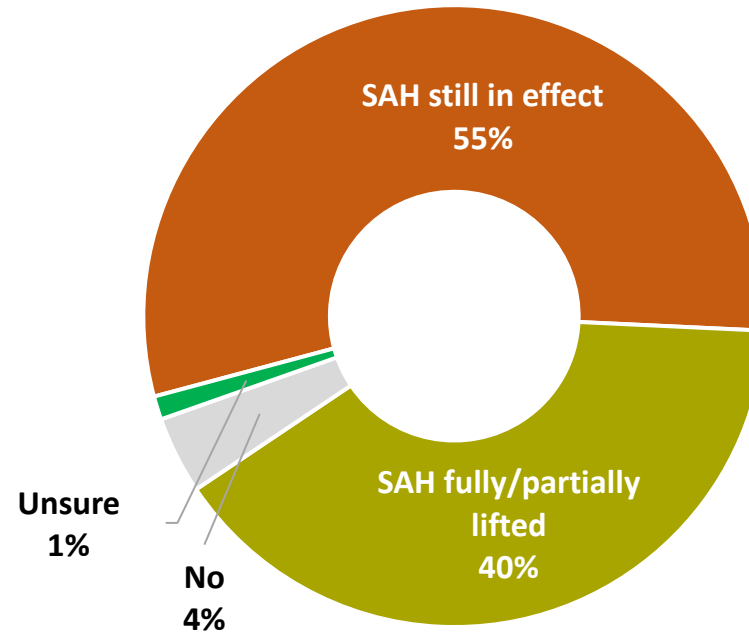


Almost One-Third of Commercial Radio Listeners Live in a State/City With a Fully/Partially Lifted “Stay at Home” Order

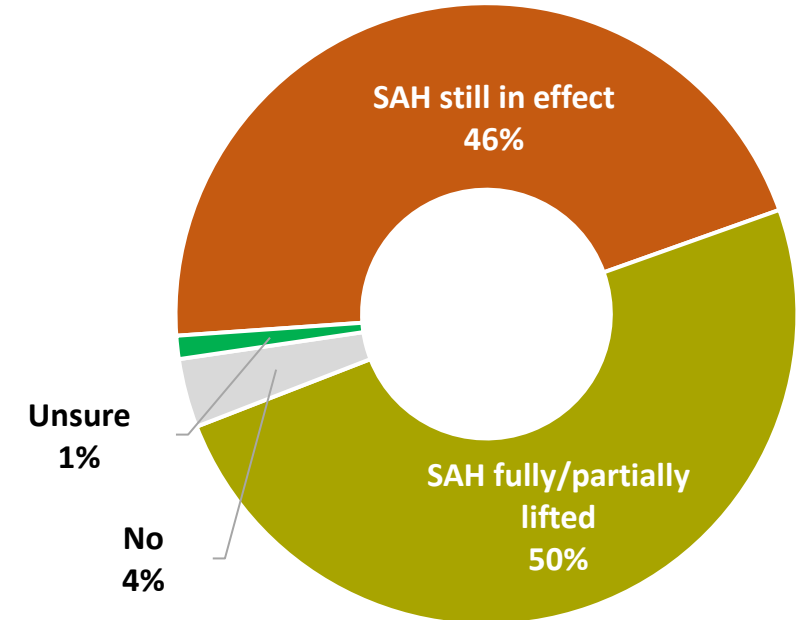
Commercial Radio



Public Radio



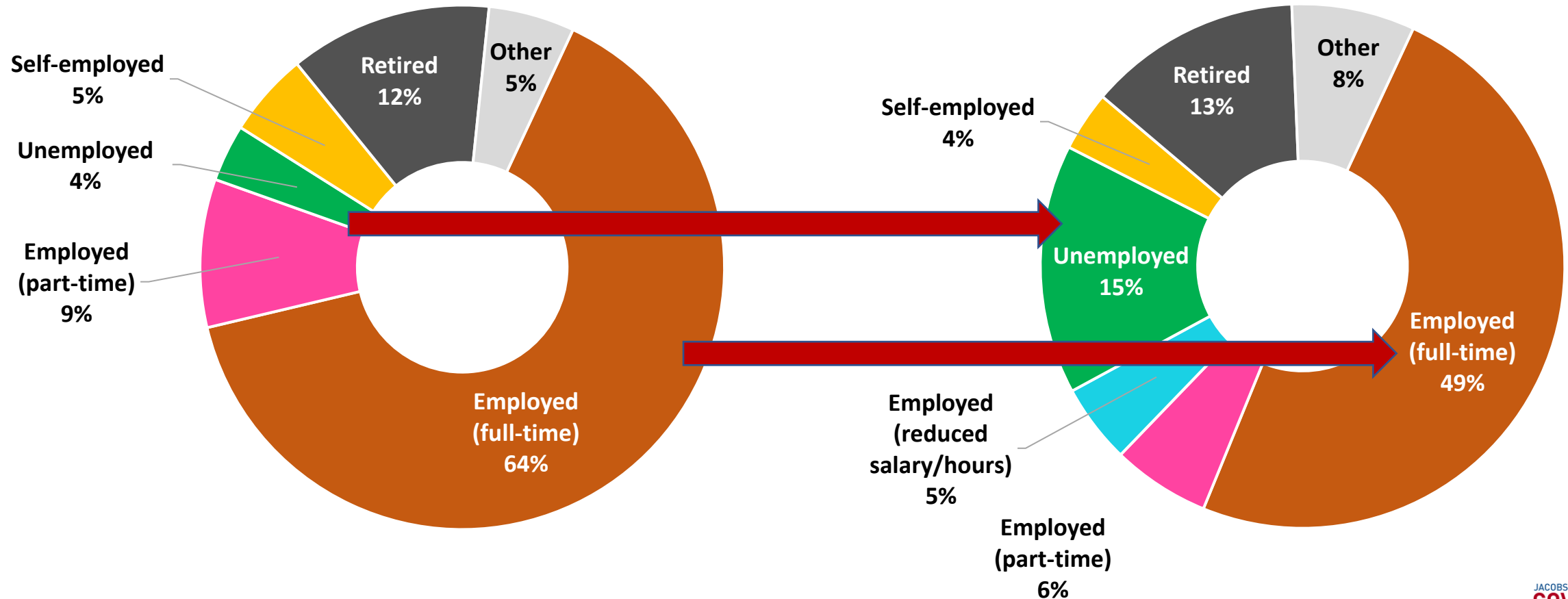
Christian Music Radio



Consistent With U.S. Reports, Many Have Lost Their Jobs Since COVID-19 Began

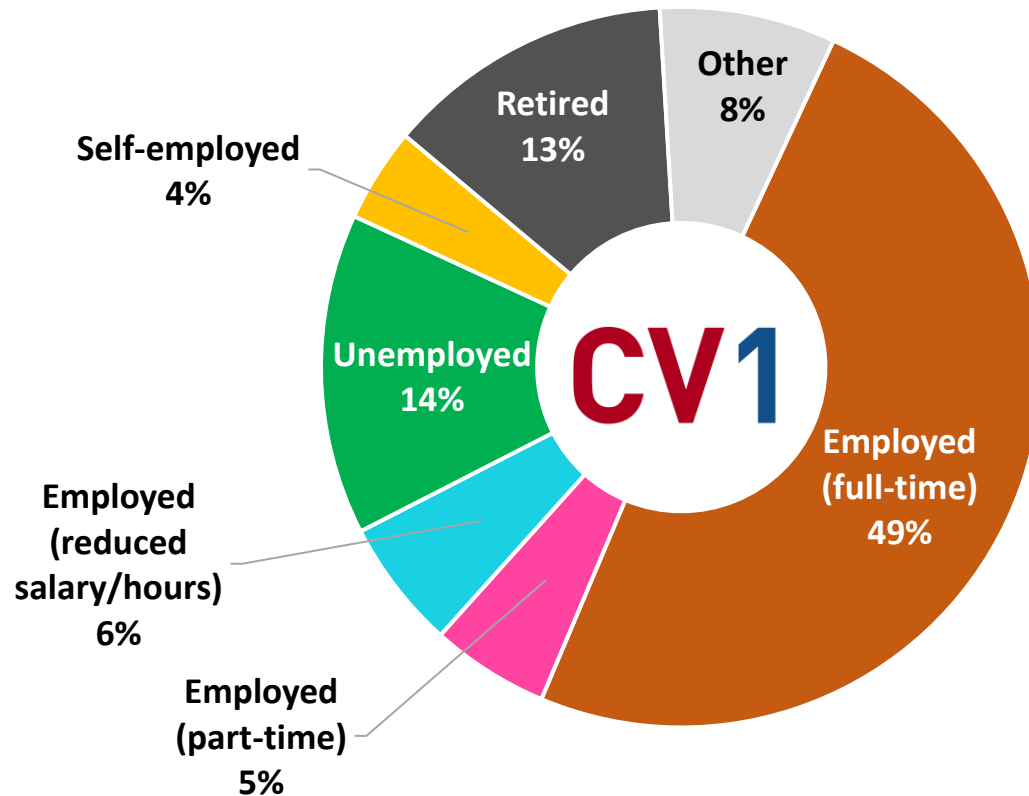
BEFORE Coronavirus Outbreak

Current Employment Status

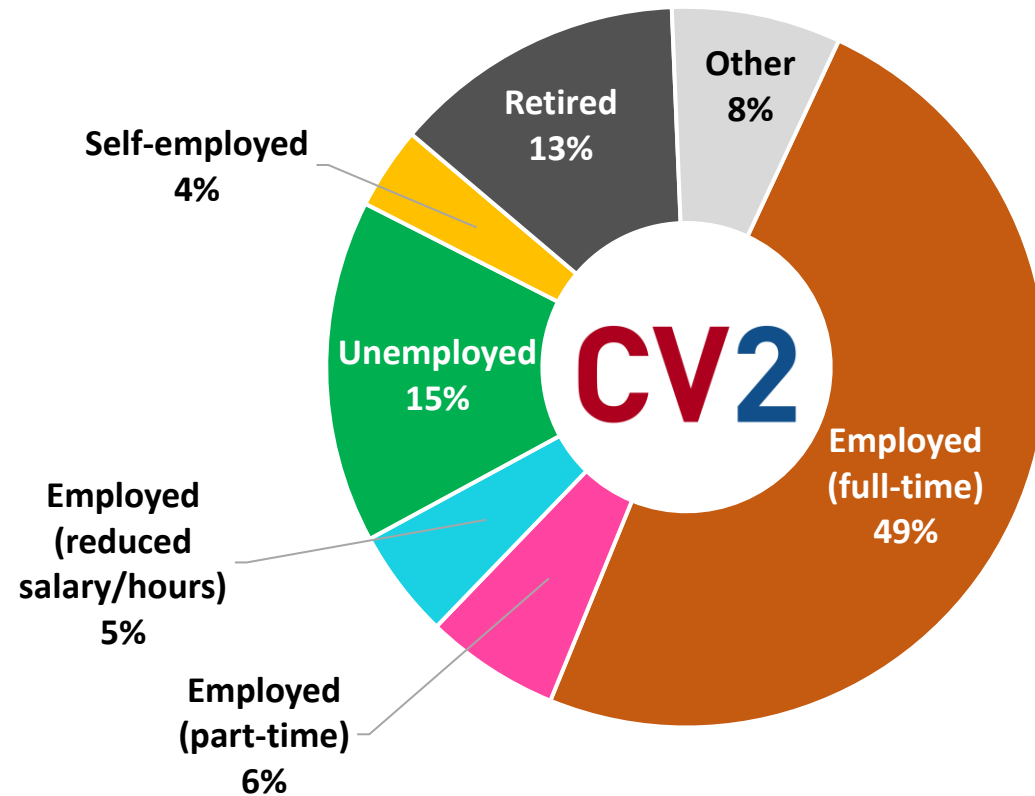


But Most Job Losses Occurred Weeks Ago

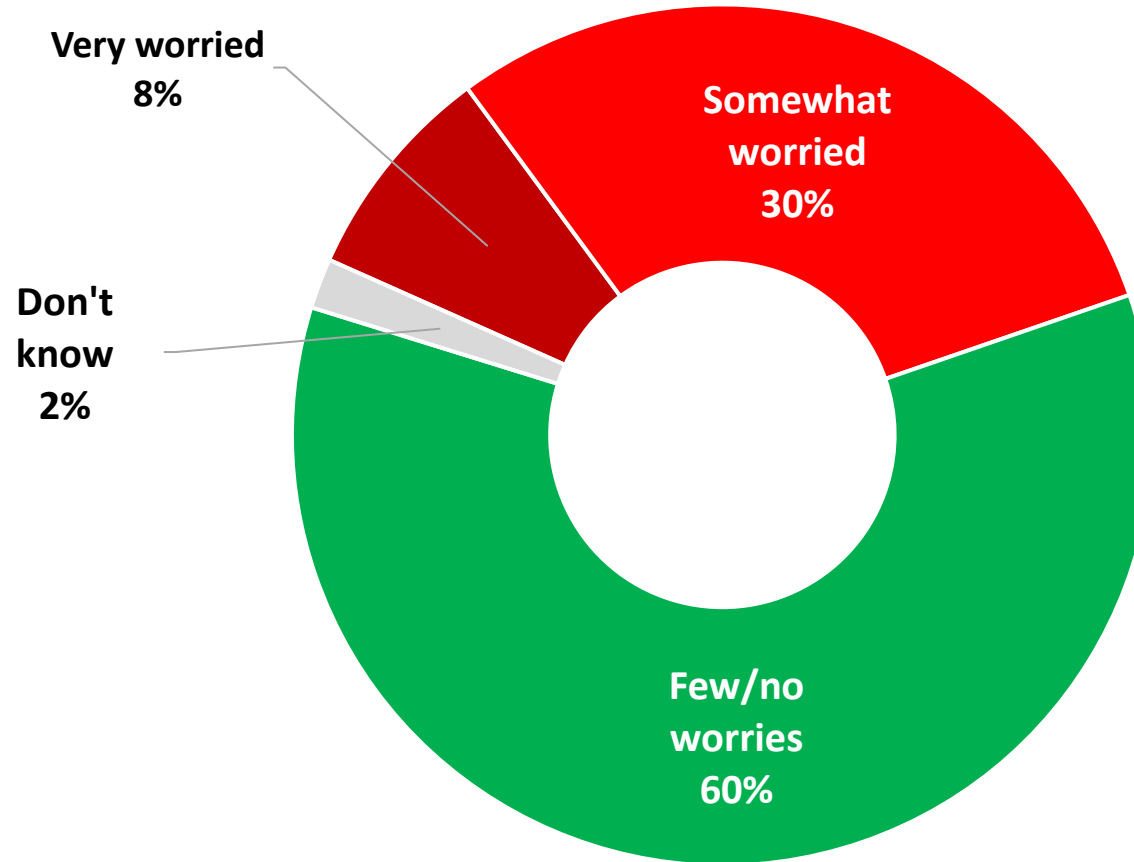
April 2020



May 2020



Among the Employed, Nearly Four in Ten Are Worried About Their Job Security

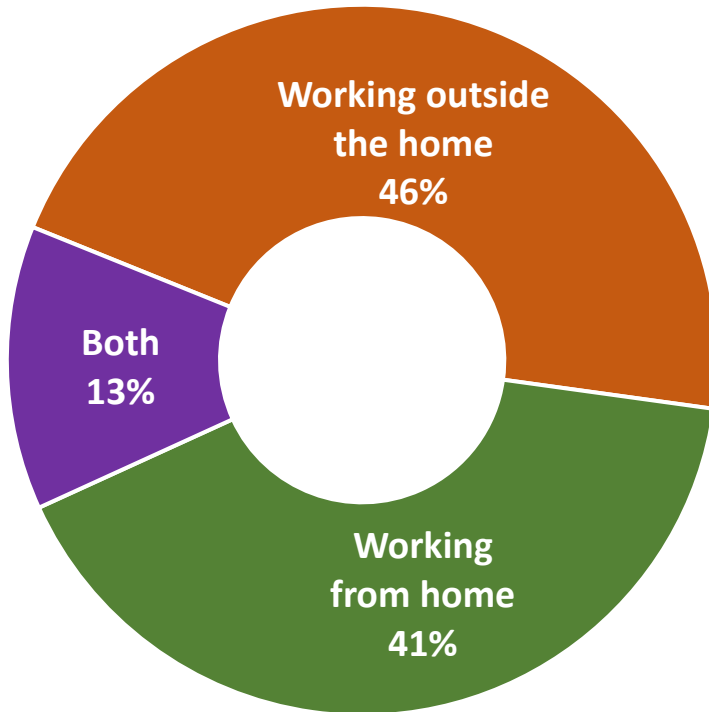




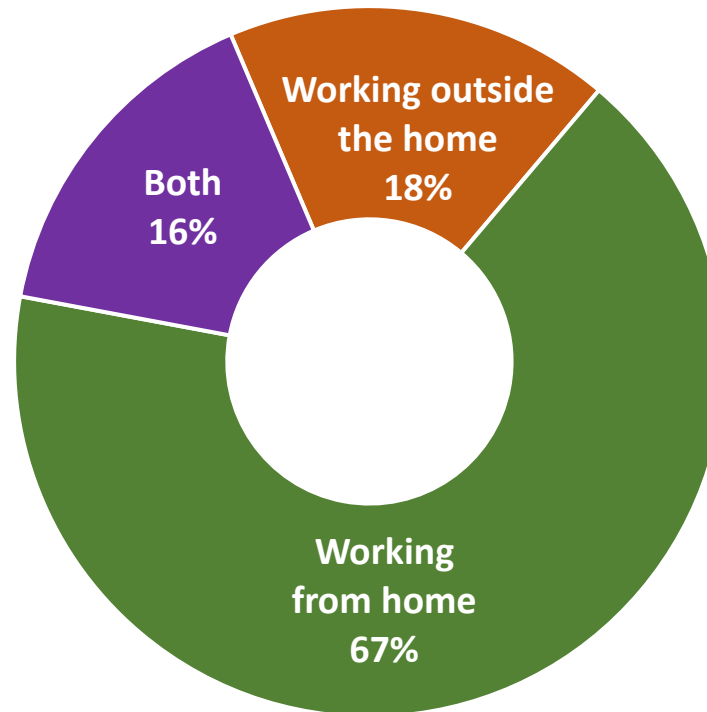
WFH

Among Employed Commercial Radio Listeners, A Majority Are Doing Some Work From Home

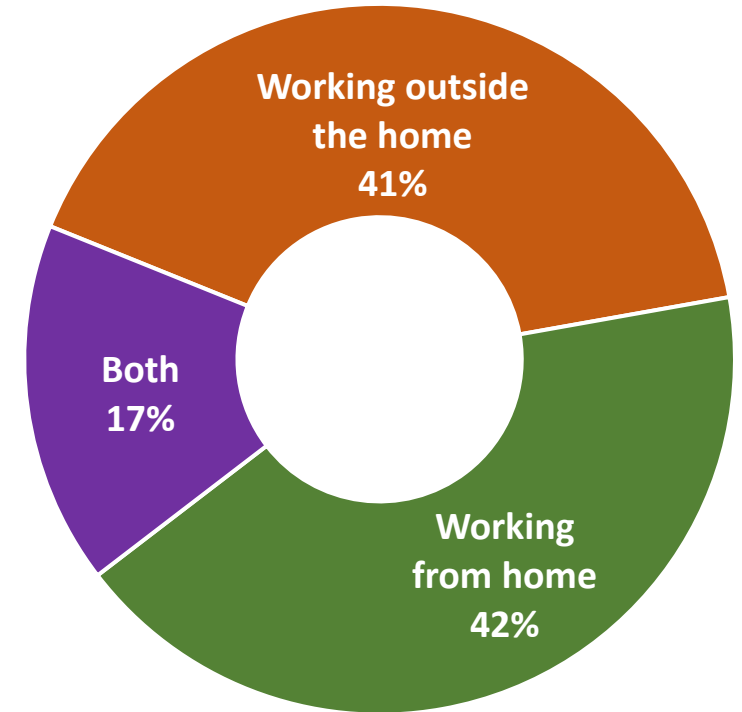
Commercial Radio



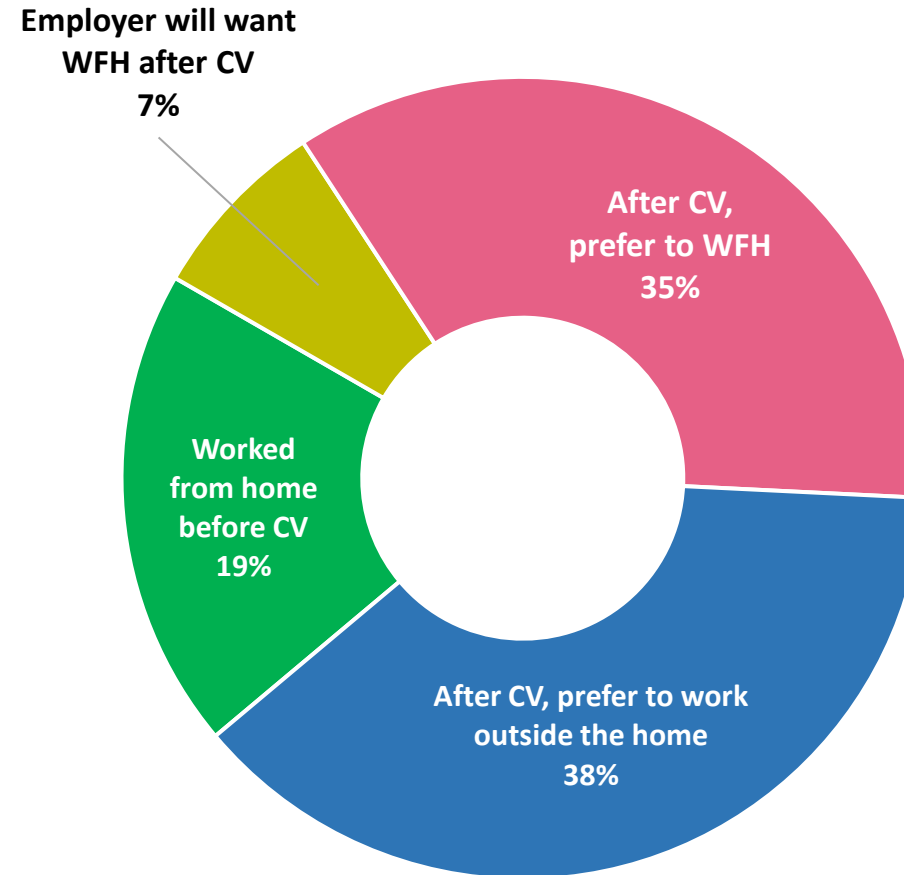
Public Radio



Christian Music Radio



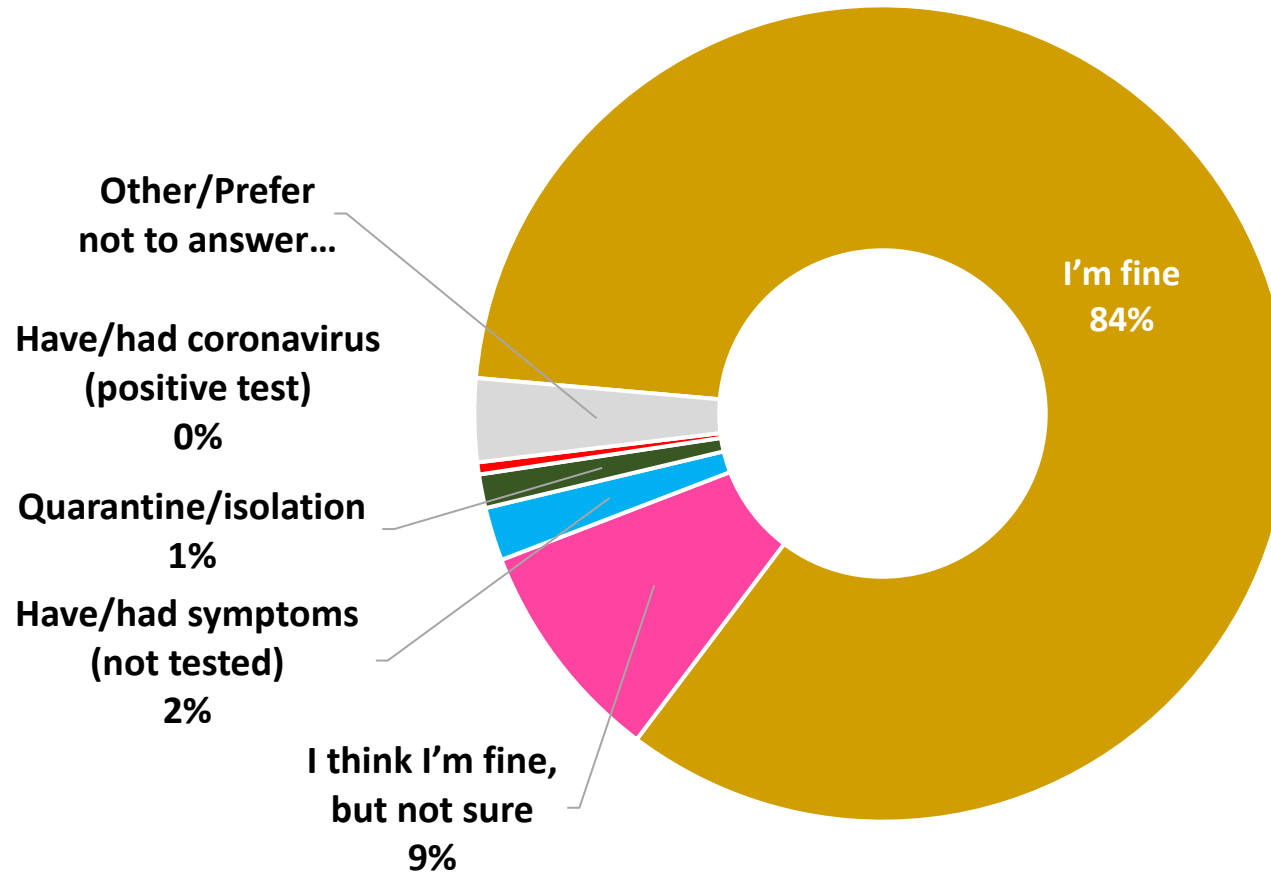
Among Those Employed Working From Home, Most Will Likely WFH Post-COVID-19





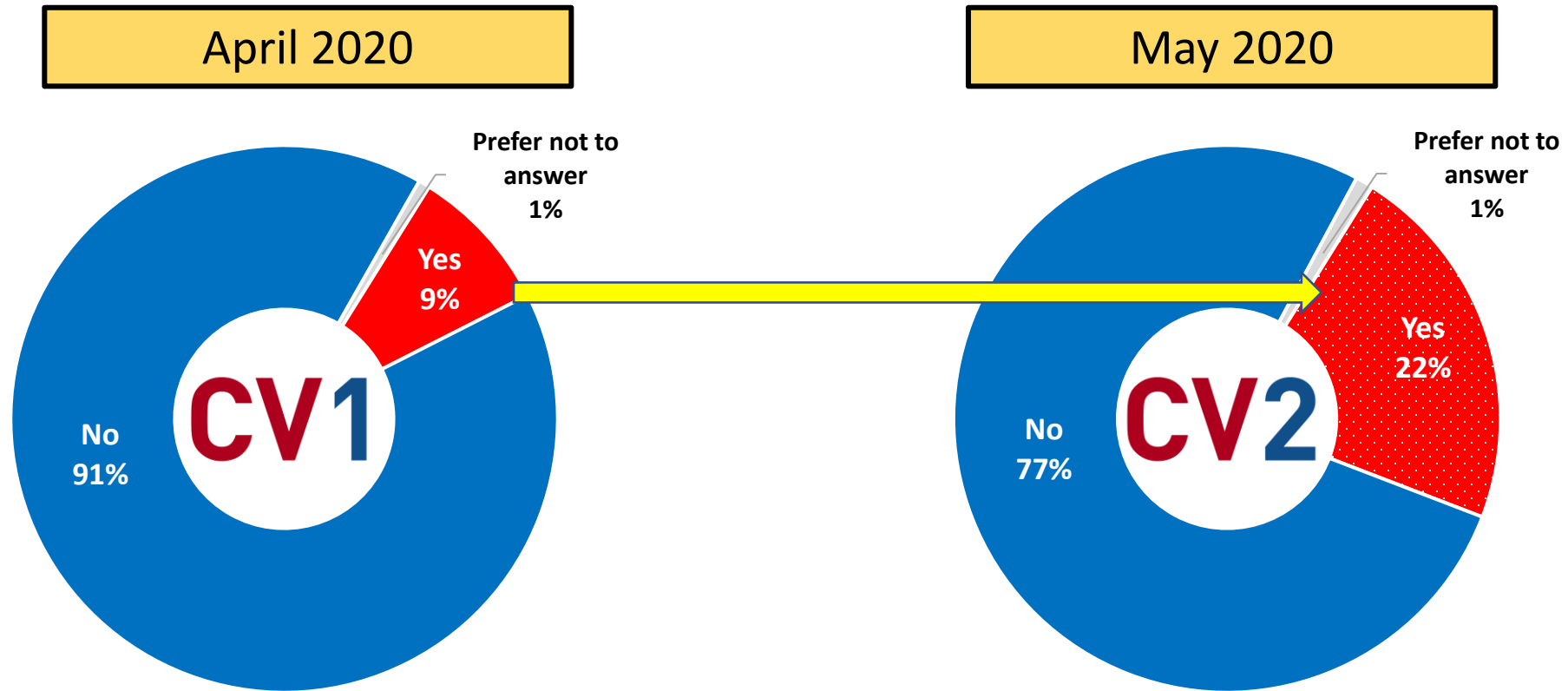
The Commercial Radio Audience's Mindset

Most Are Feeling Good, But More Than One in Ten Has Had a Positive Test, Symptoms or Just Aren't Sure



"What is your current state of health?"

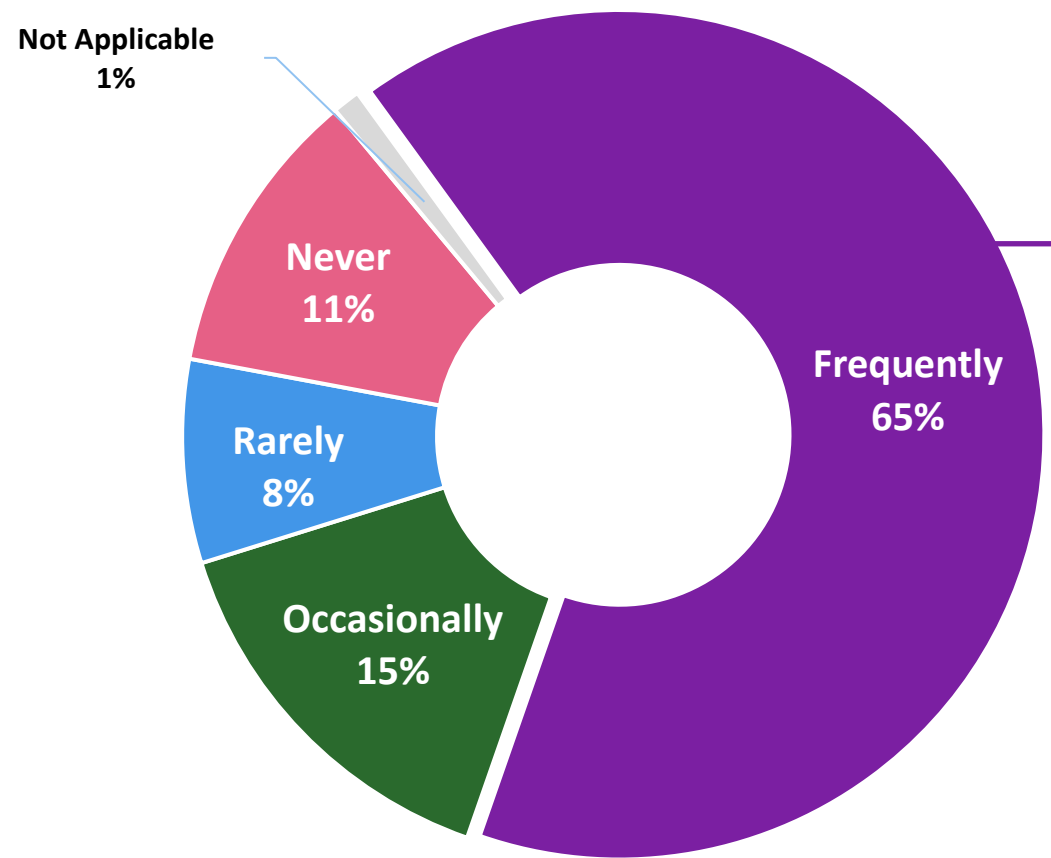
More Than One in Five Knows Someone Who's Tested Positive or Otherwise Very Likely Have/Had COVID-19



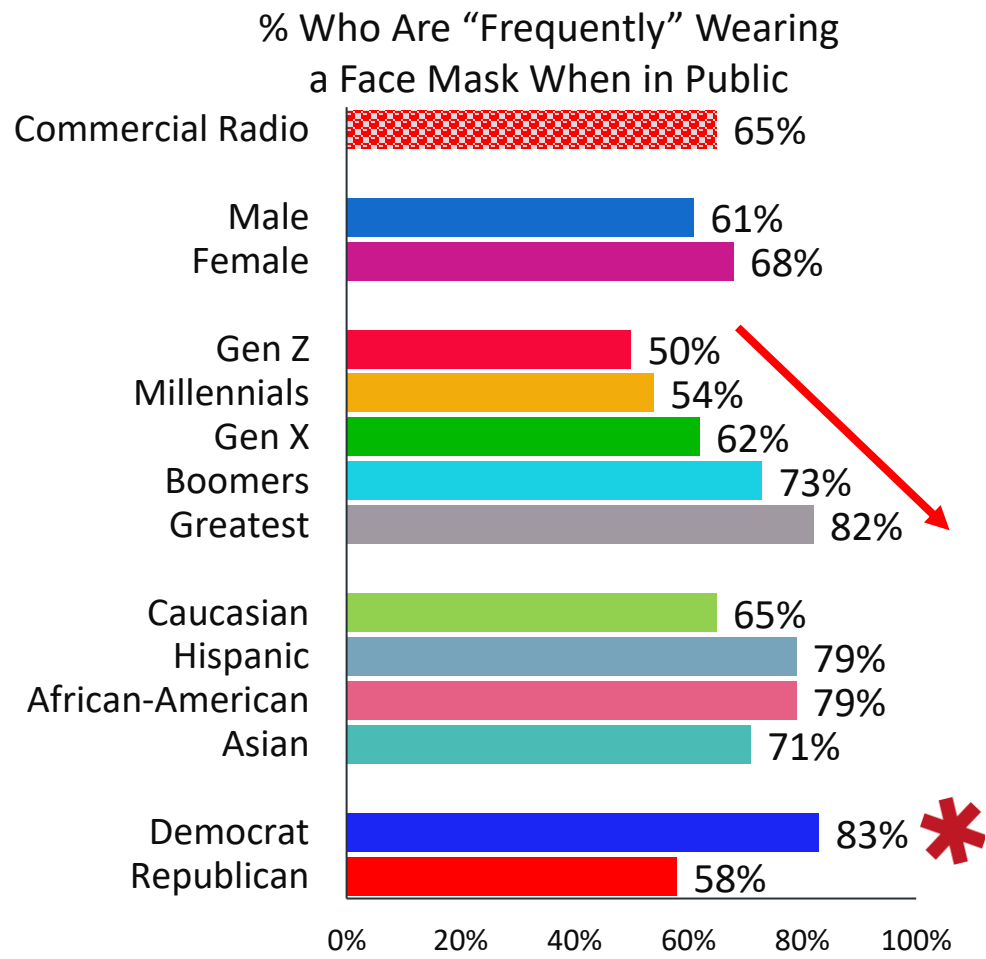
“Do you have any family members, friends or co-workers who have tested positive for coronavirus?”

“Do you have any family members, friends or co-workers who have tested positive for coronavirus or are likely to have had coronavirus even though they were not tested?”

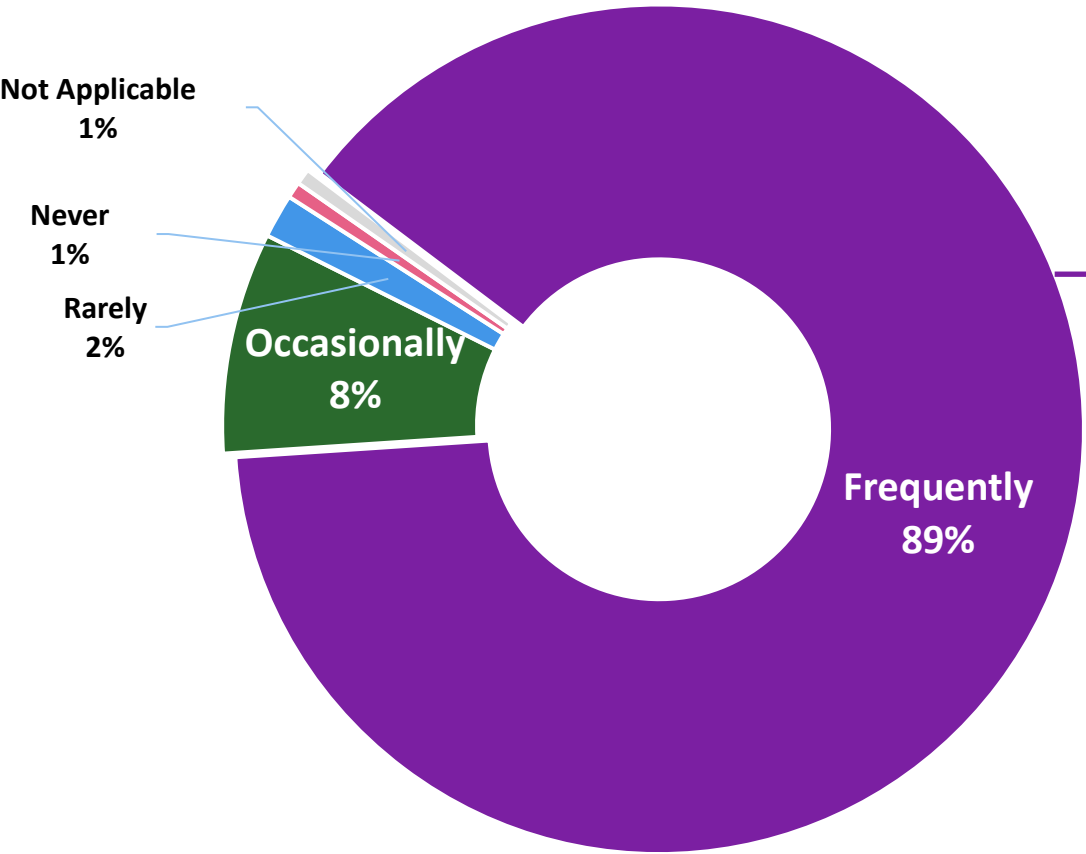
Two in Three Say They Frequently Wear a Face Mask in Public, Led By Progressively Older Generations and Democrats



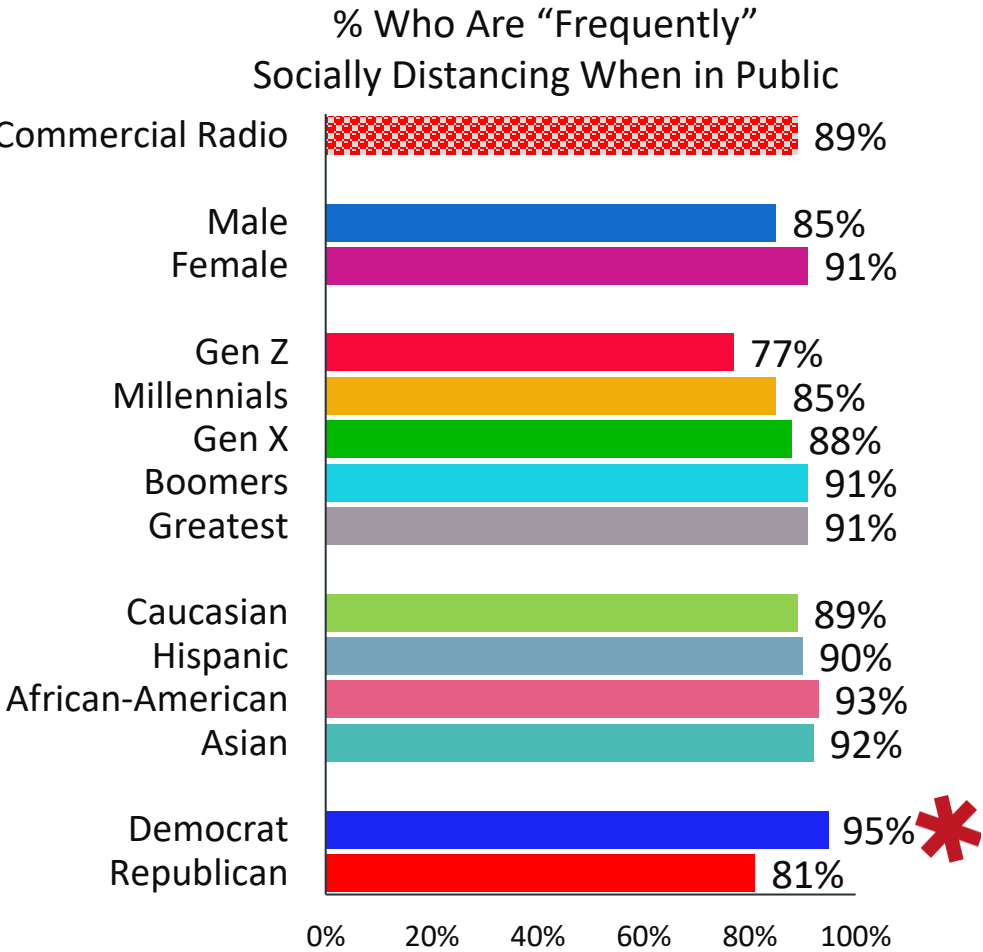
“At this time, how often are you personally wearing a face mask when in public?”



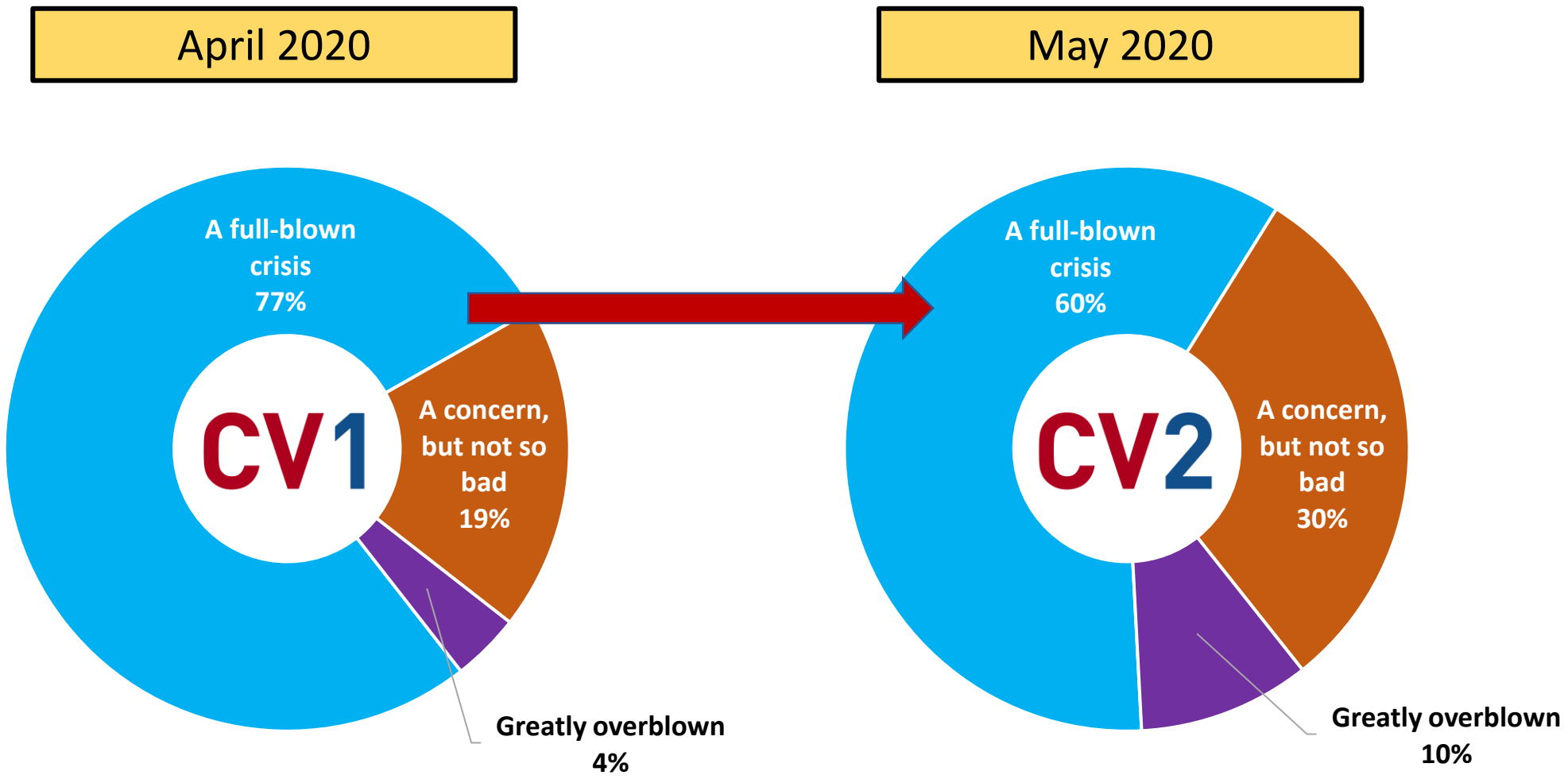
Most Say They Frequently Social Distance in Public



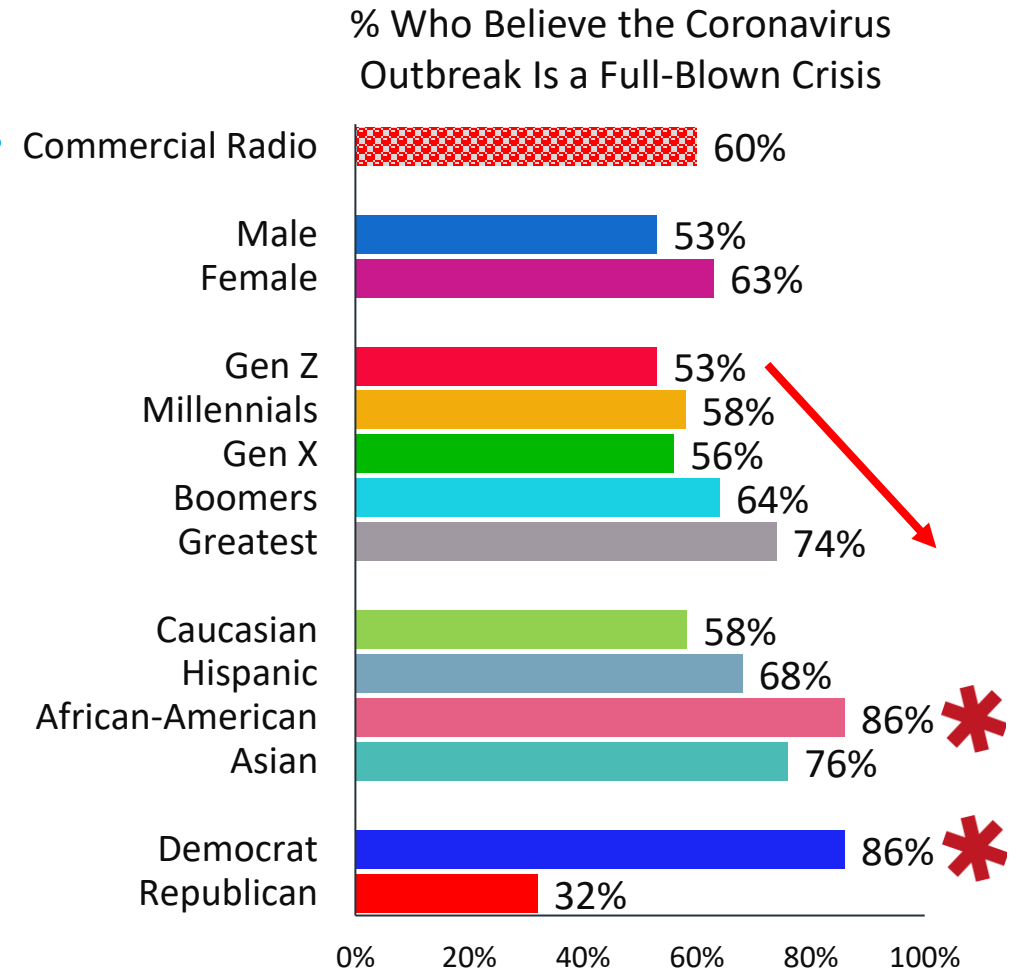
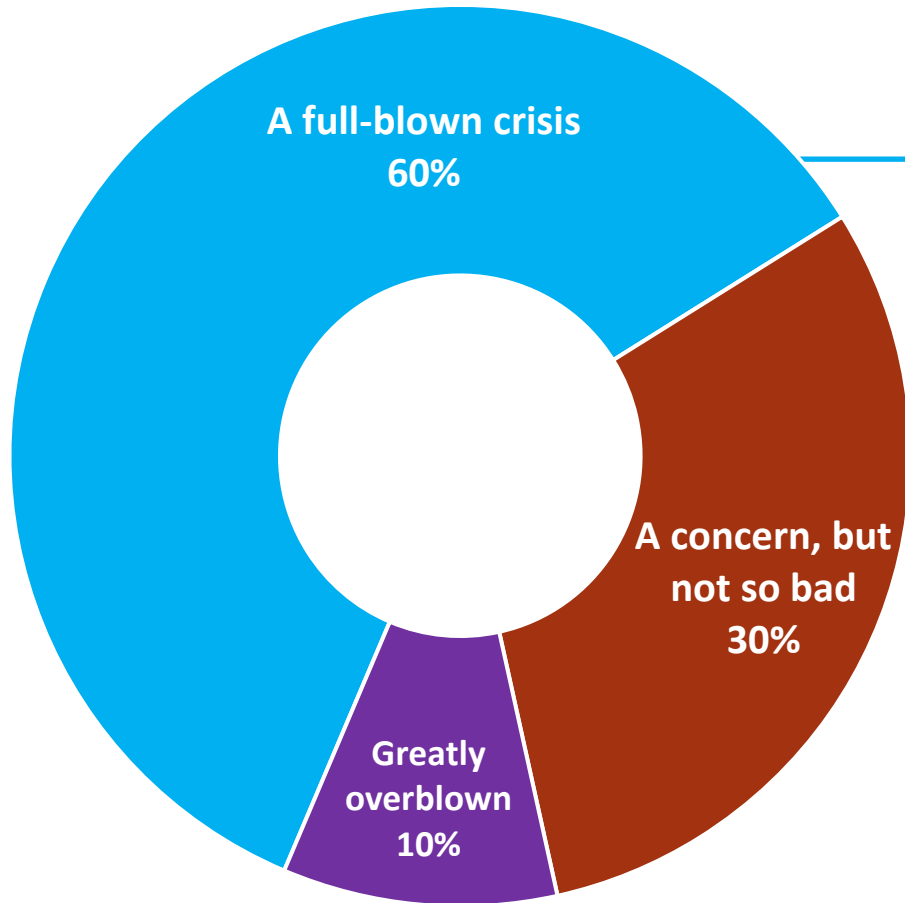
“At this time, how often are you personally maintaining social distancing guidelines when in public?”



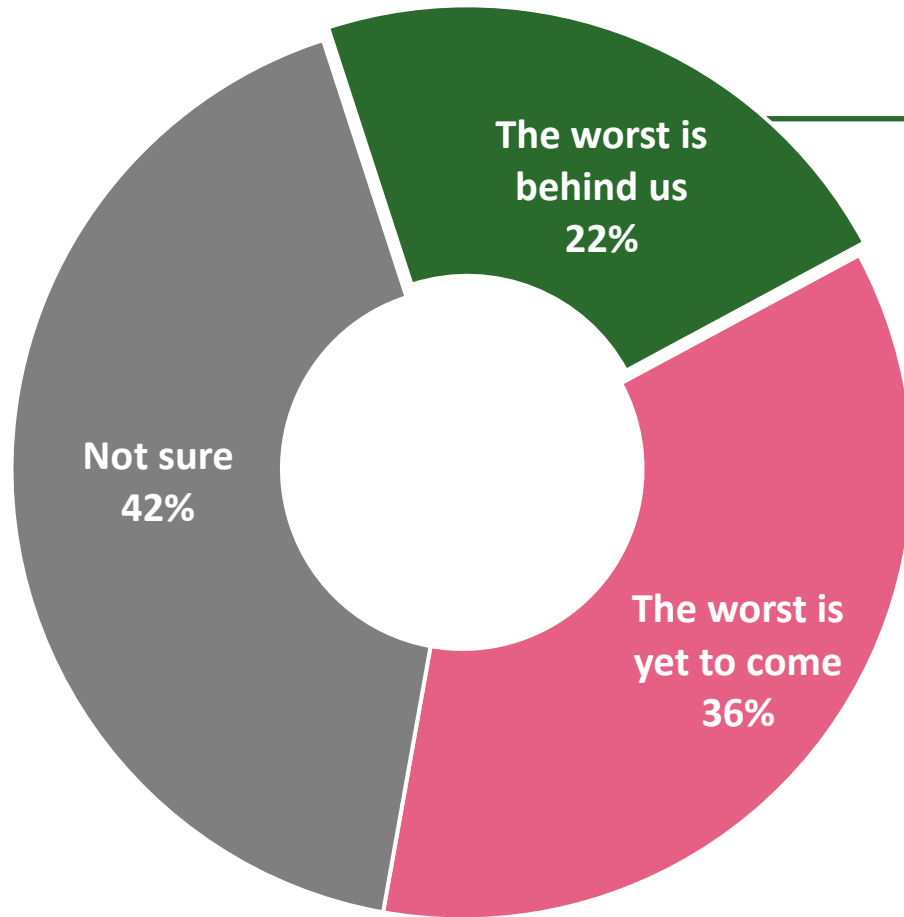
While Most Still Feel the Coronavirus Outbreak Is a Full-Blown Crisis, More Now Say It's Overblown or Not So Bad



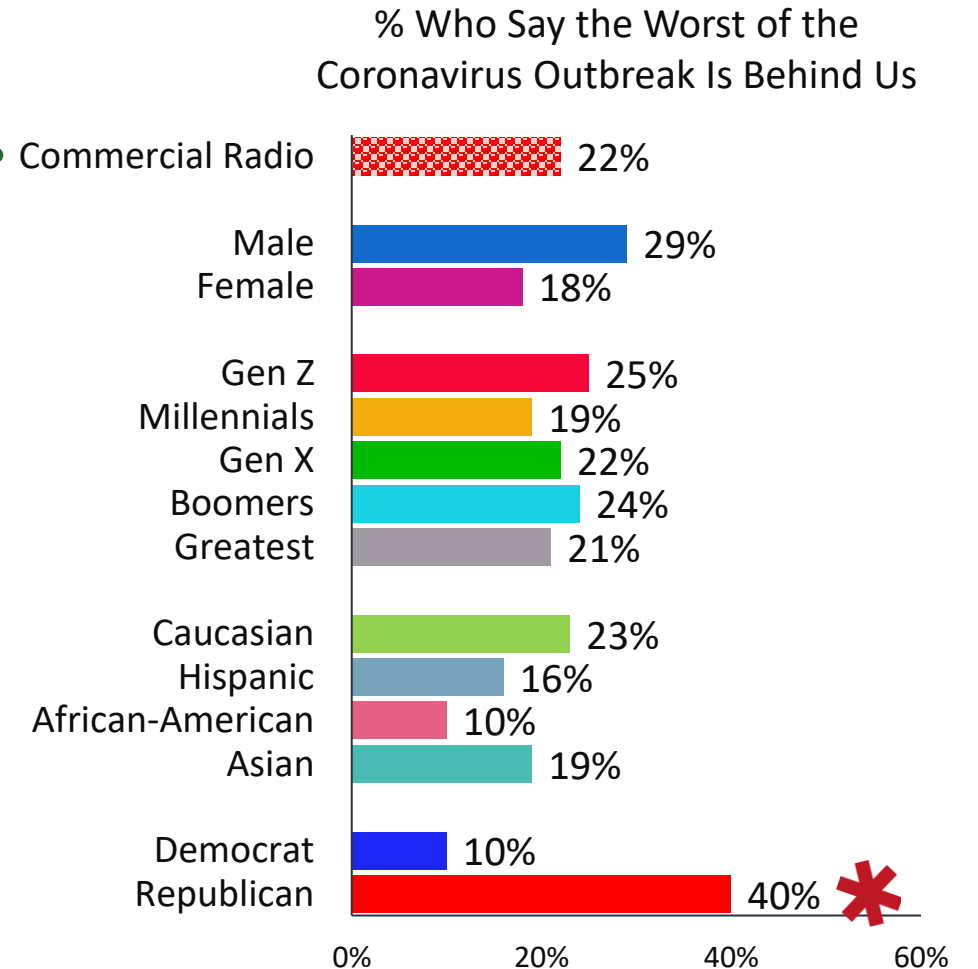
Six in Ten Say the Coronavirus Outbreak Is a Full-Blown Crisis, With a Deep Political Divide



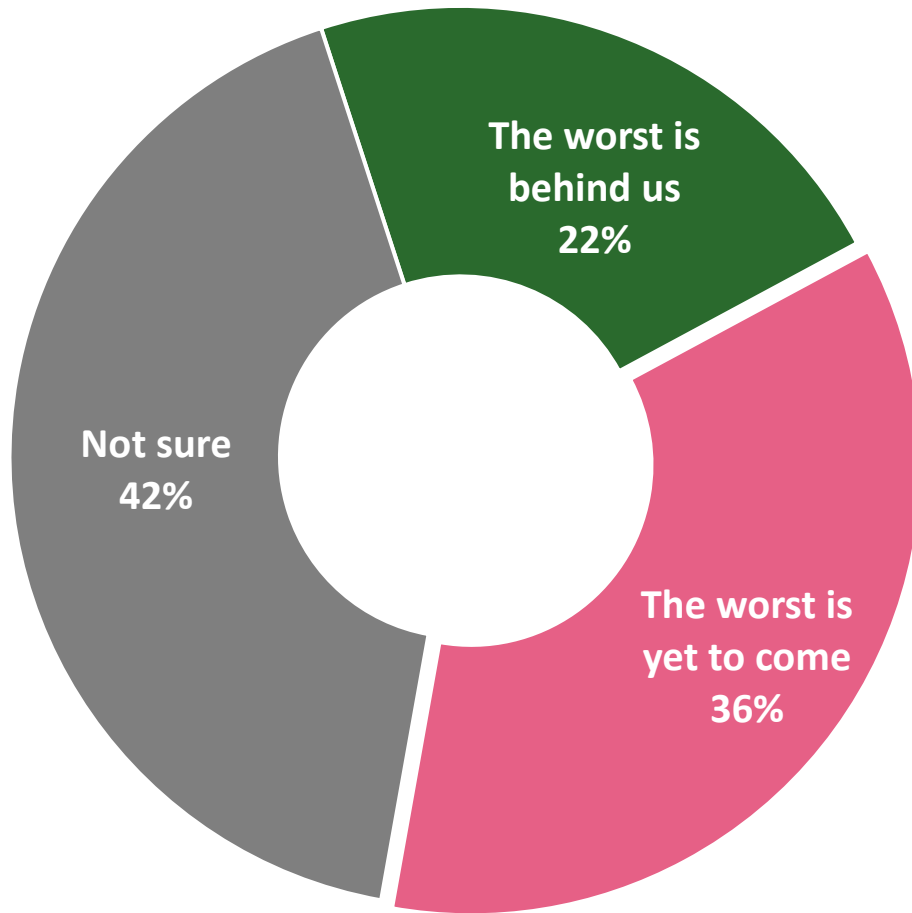
Fewer Than One in Four Say the Worst of the Coronavirus Outbreak Is Behind Us



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

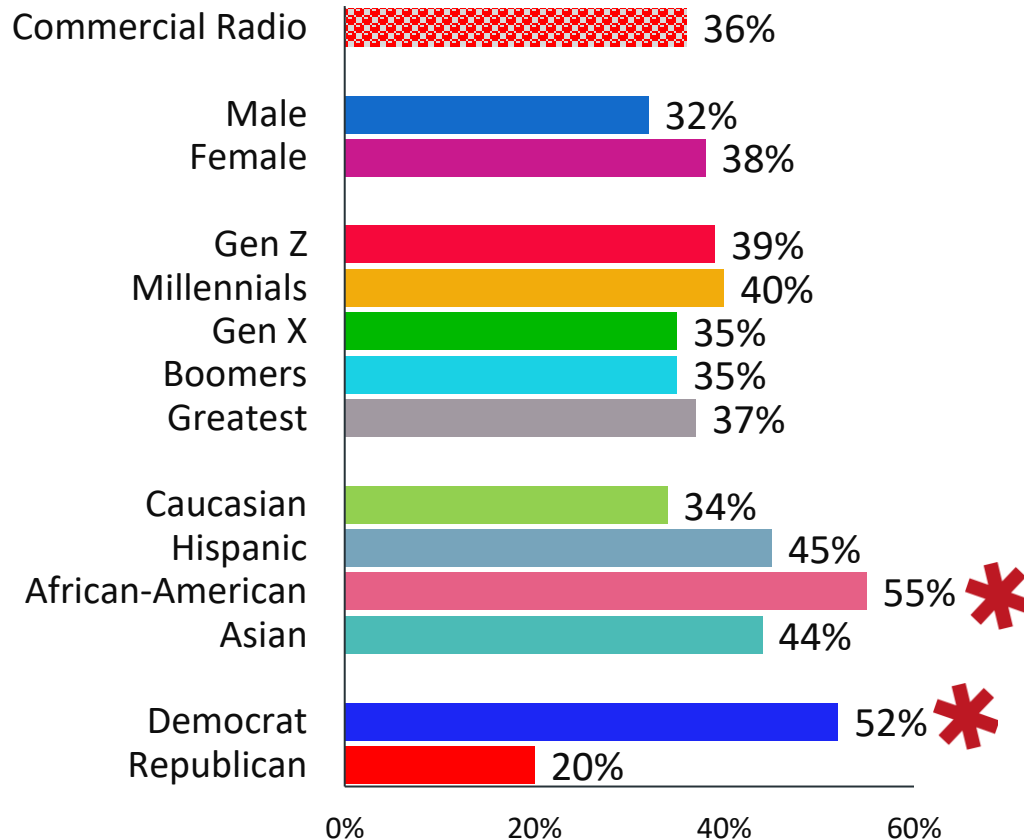


More Than One-Third Say the Worst of the COVID-19 Outbreak Is Yet to Come

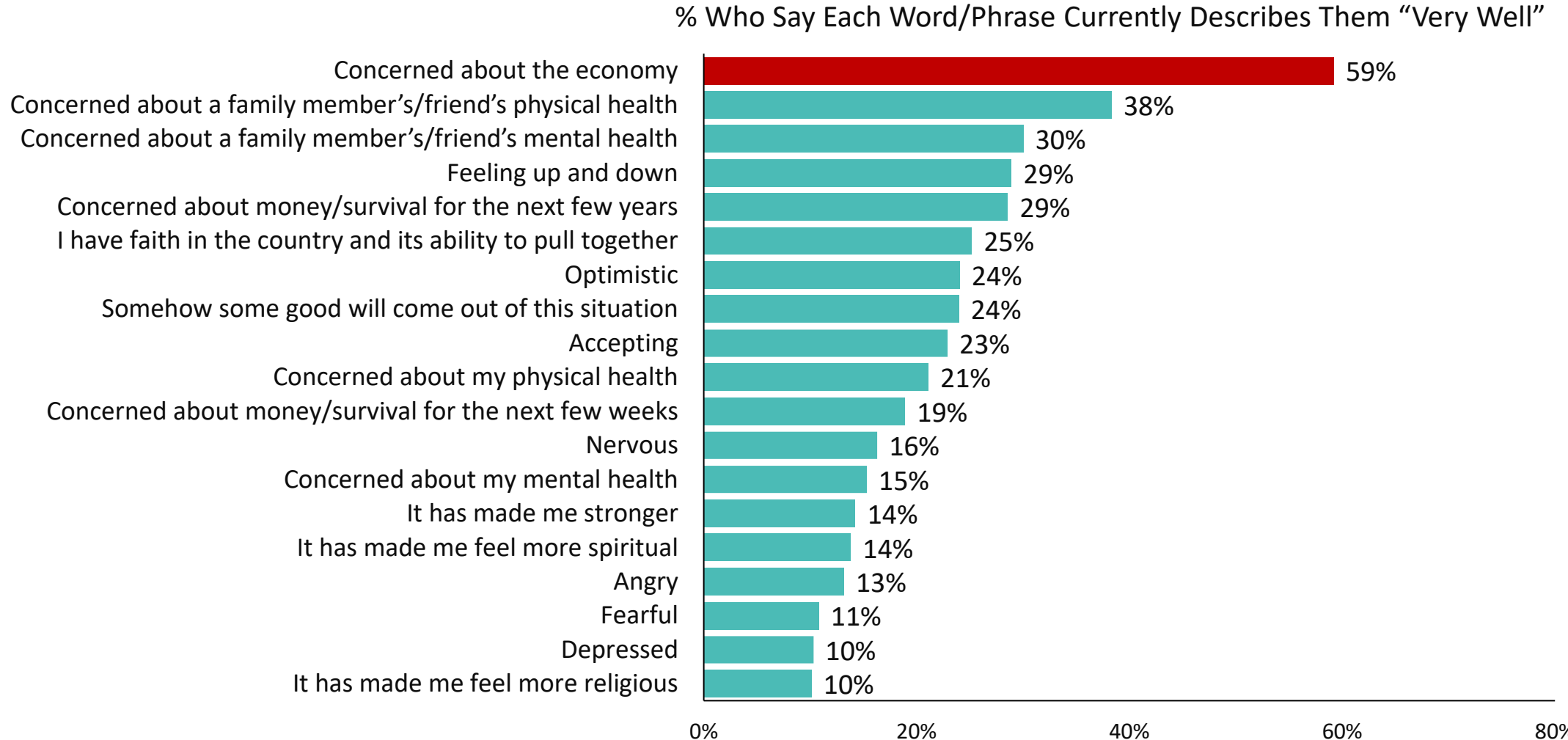


"Which of the following best describes how you feel about the coronavirus outbreak?"

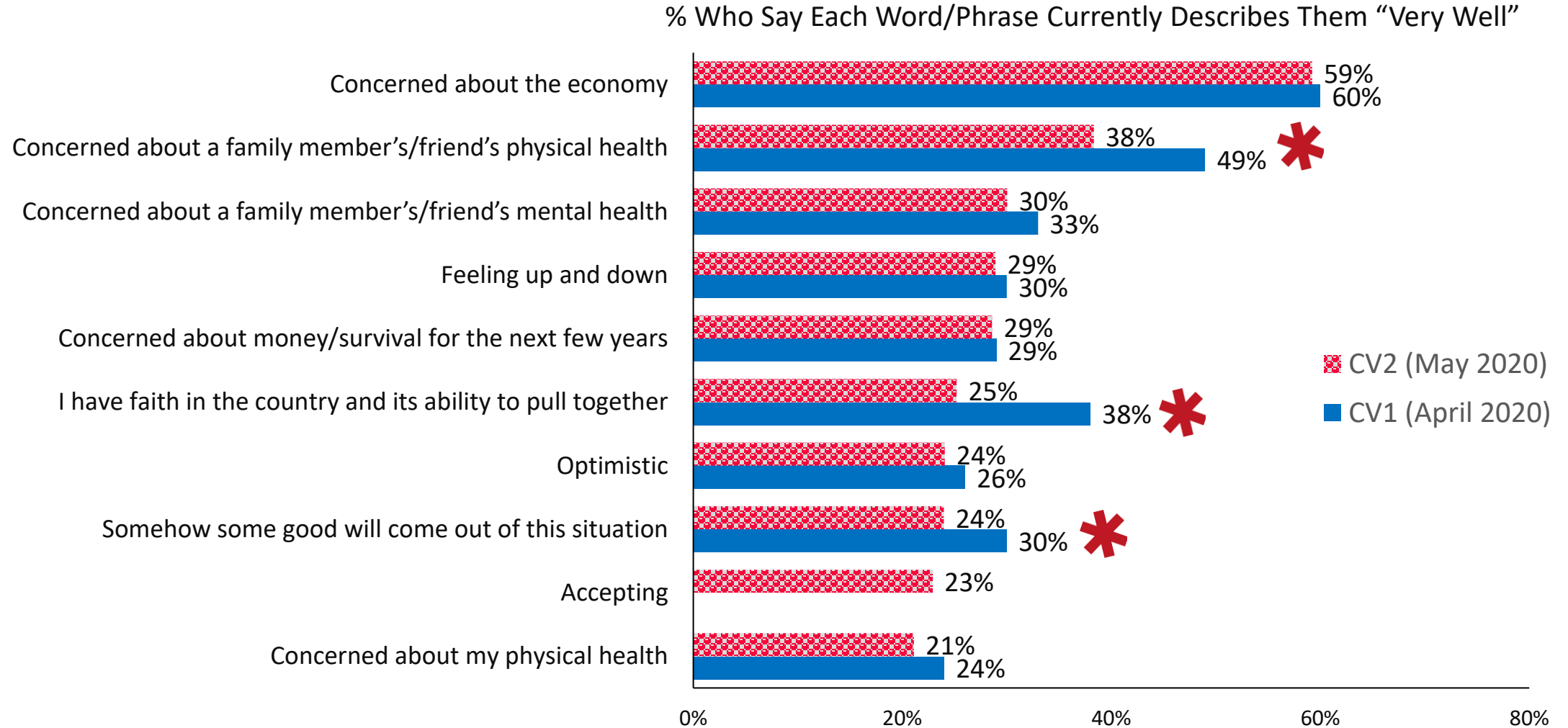
% Who Say the Worst of the Coronavirus Outbreak Is Yet to Come



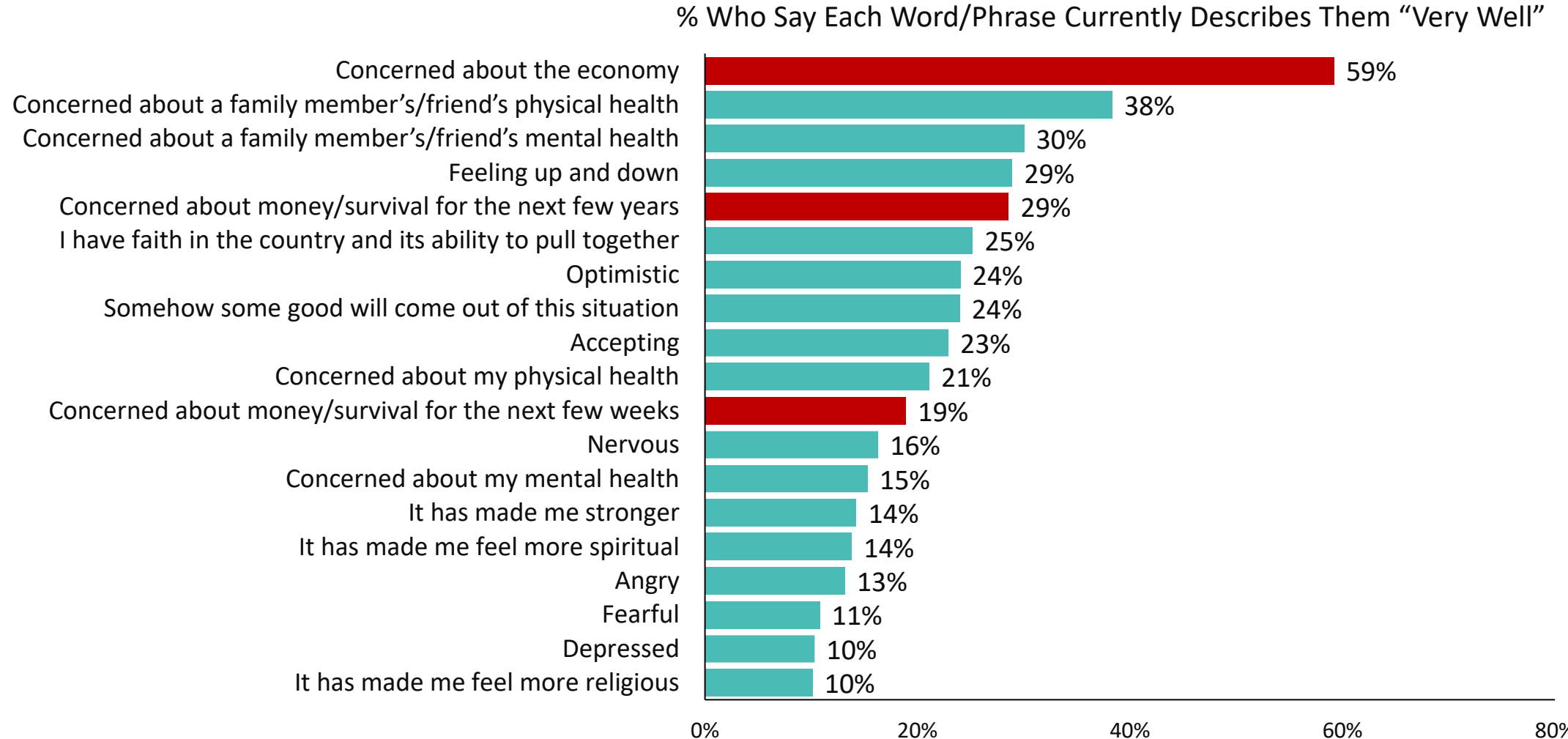
Similar to Last Month, the Economy Tops the List of Concerns



Six Weeks Later, There Is Less Concern for Family/Friends' Physical Health and Slightly Less Optimism

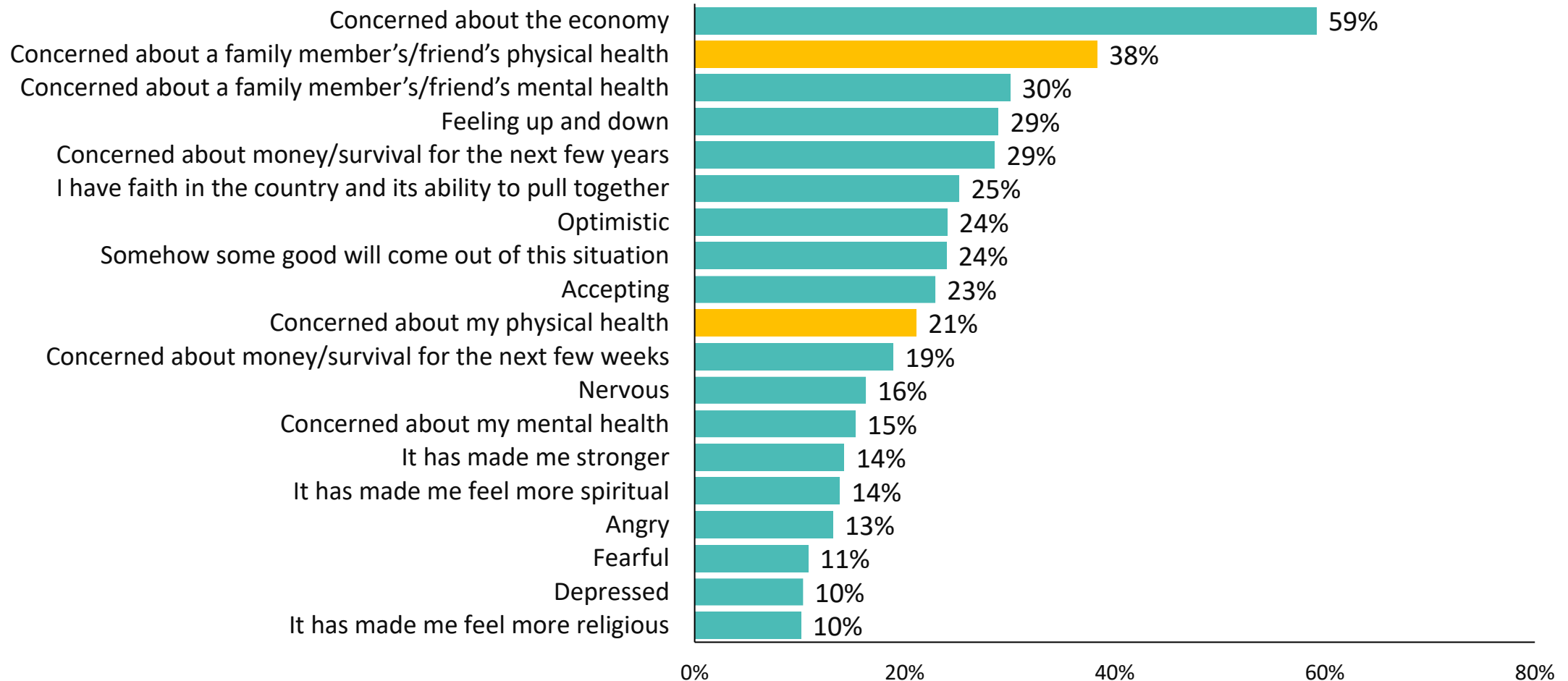


The Economy Is the #1 Concern, And Nearly Three in Ten Fret About Financial Issues Over the Next Few Years



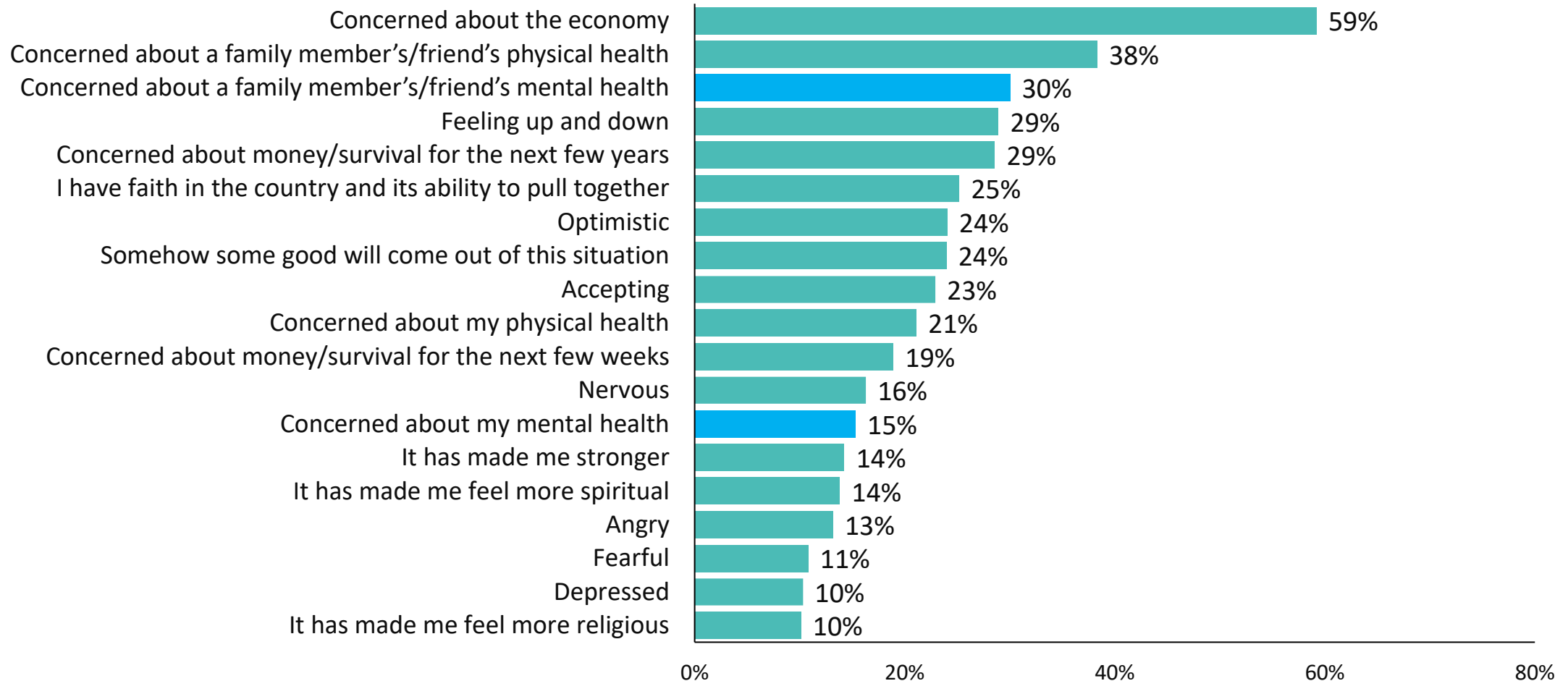
Nearly Twice As Many Are Concerned About the Physical Health of Others Rather Than Themselves

% Who Say Each Word/Phrase Currently Describes Them "Very Well"



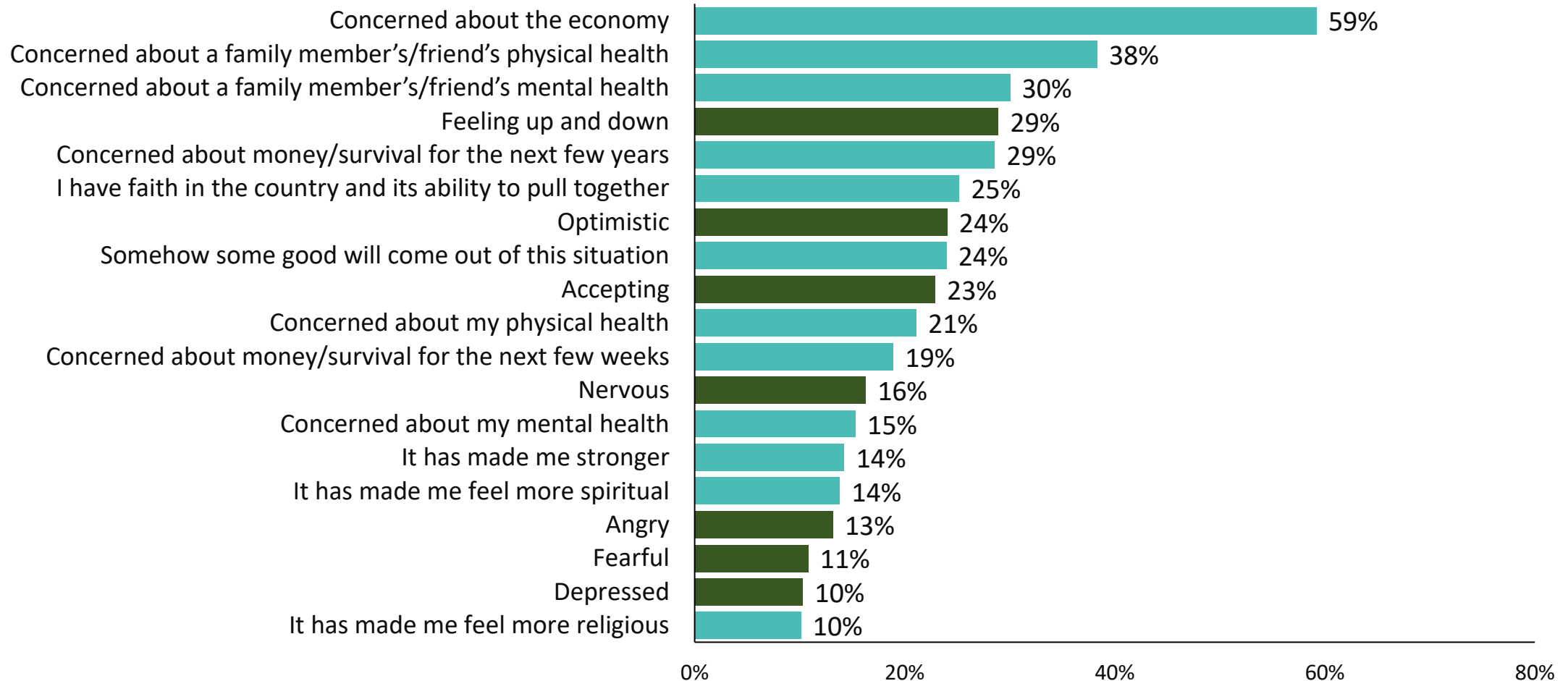
Twice As Many Respondents Are Worried About the Mental Health of Others, Rather Than Themselves

% Who Say Each Word/Phrase Currently Describes Them “Very Well”



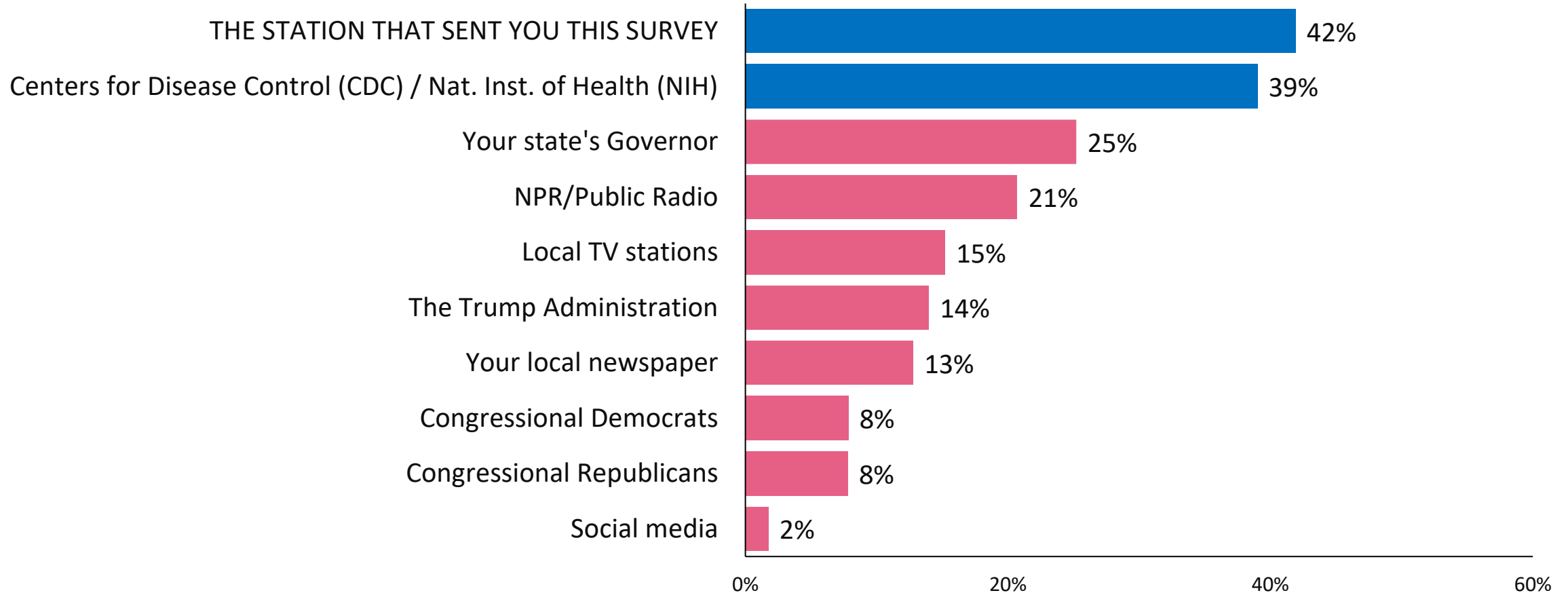
Respondents Are Less Apt to Feel Angry, Fearful, or Depressed, And More Apt To Feel “Up and Down”

% Who Say Each Word/Phrase Currently Describes Them “Very Well”

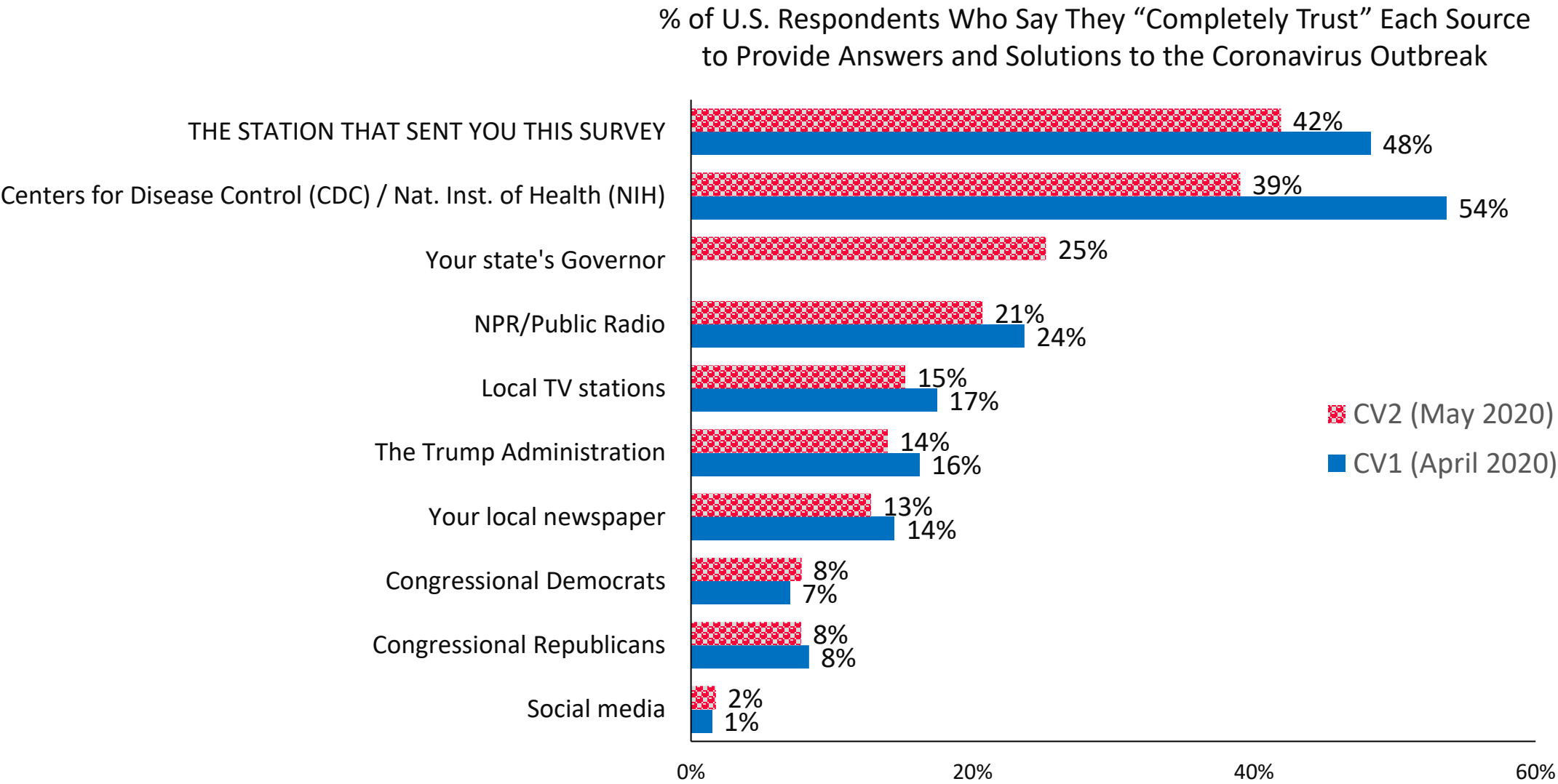


The Most Trust Is Given to Listeners' Home Stations, Followed By The CDC/NIH (#1 in April)

% of U.S. Respondents Who Say They "Completely Trust" Each Source to Provide Answers and Solutions to the Coronavirus Outbreak

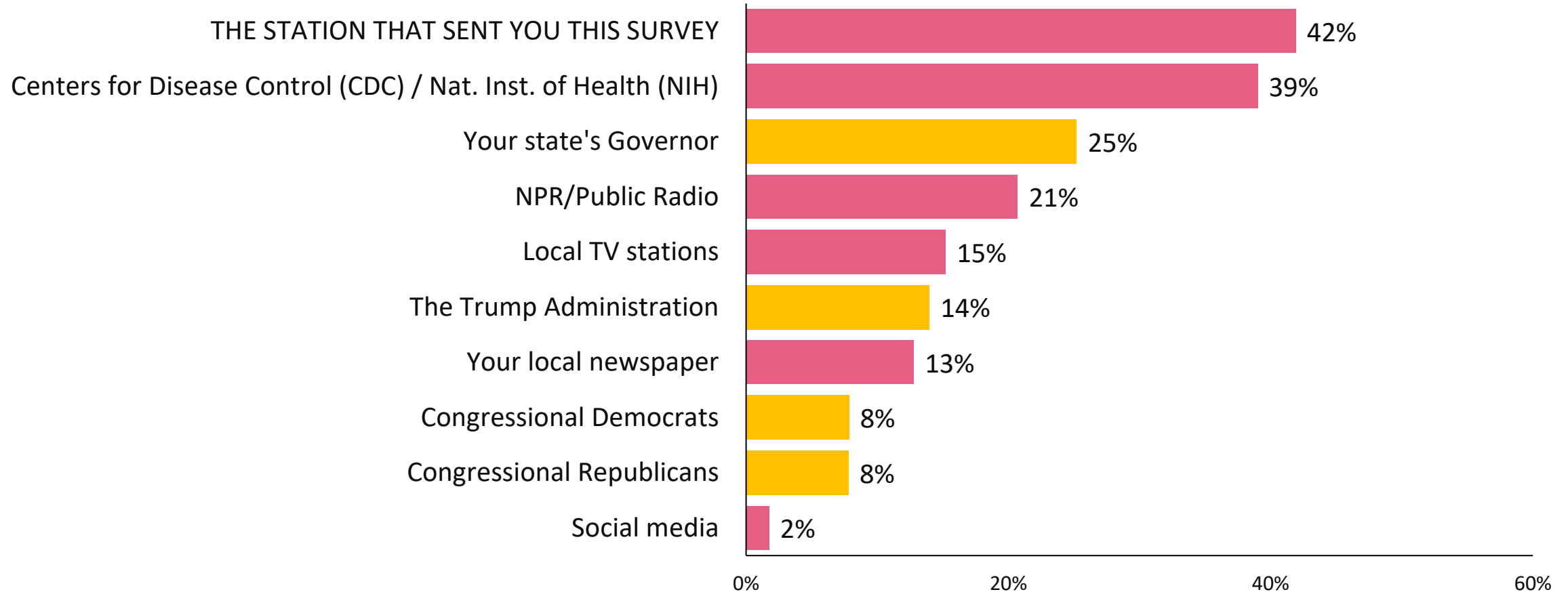


Six Weeks Later, Trust Levels Are Down Nearly Across the Board



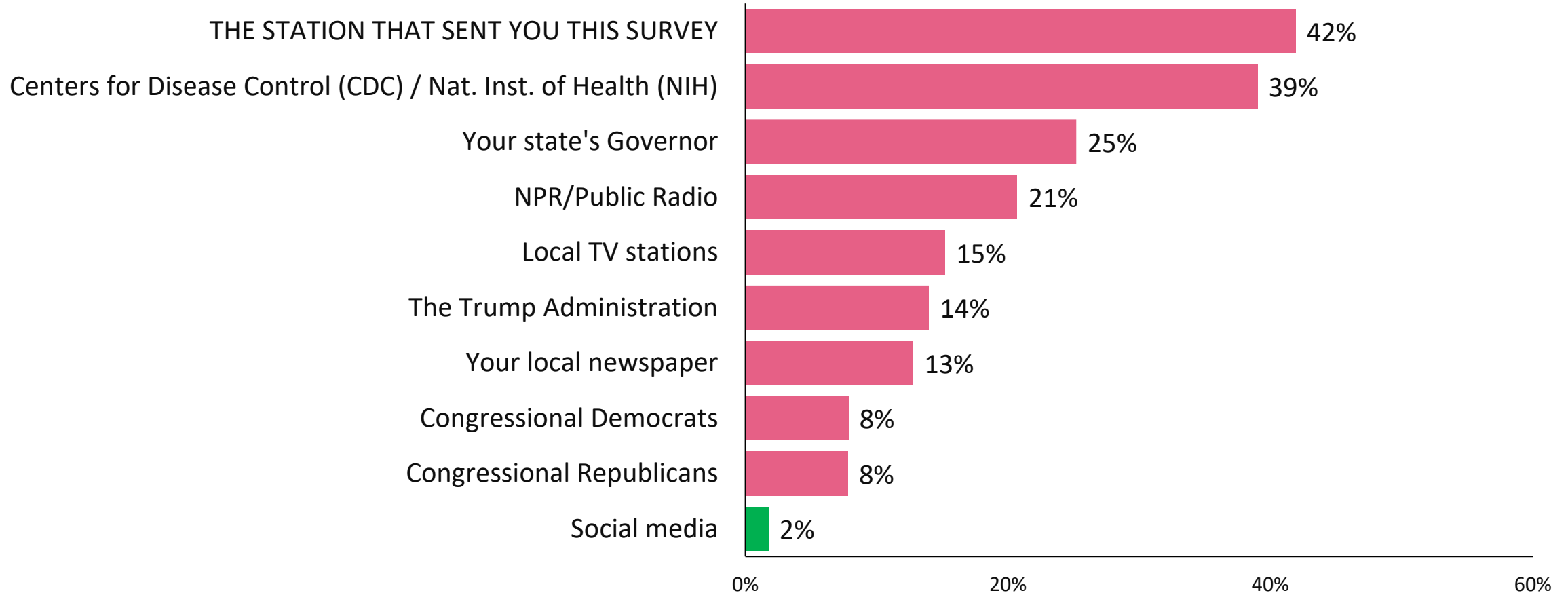
Among Political Officials, State Governors Are Most Trusted

% of U.S. Respondents Who Say They “Completely Trust” Each Source to Provide Answers and Solutions to the Coronavirus Outbreak



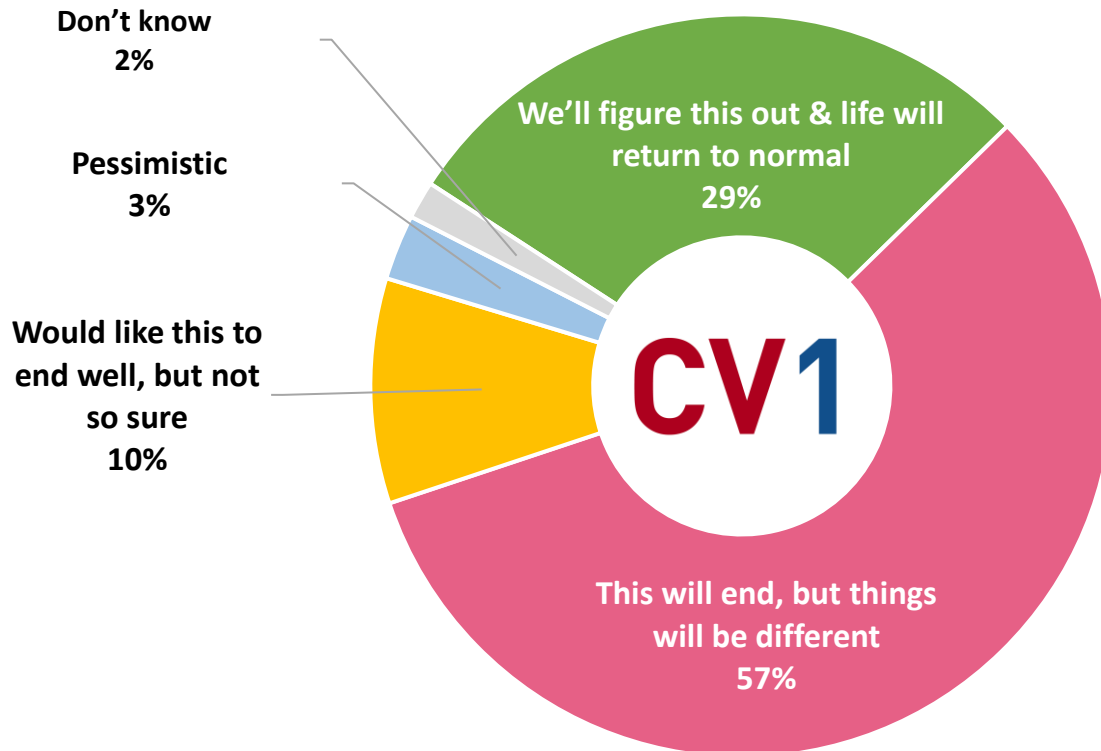
They May Use Social Media a Lot, But Do Not Trust It

% of U.S. Respondents Who Say They “Completely Trust” Each Source to Provide Answers and Solutions to the Coronavirus Outbreak

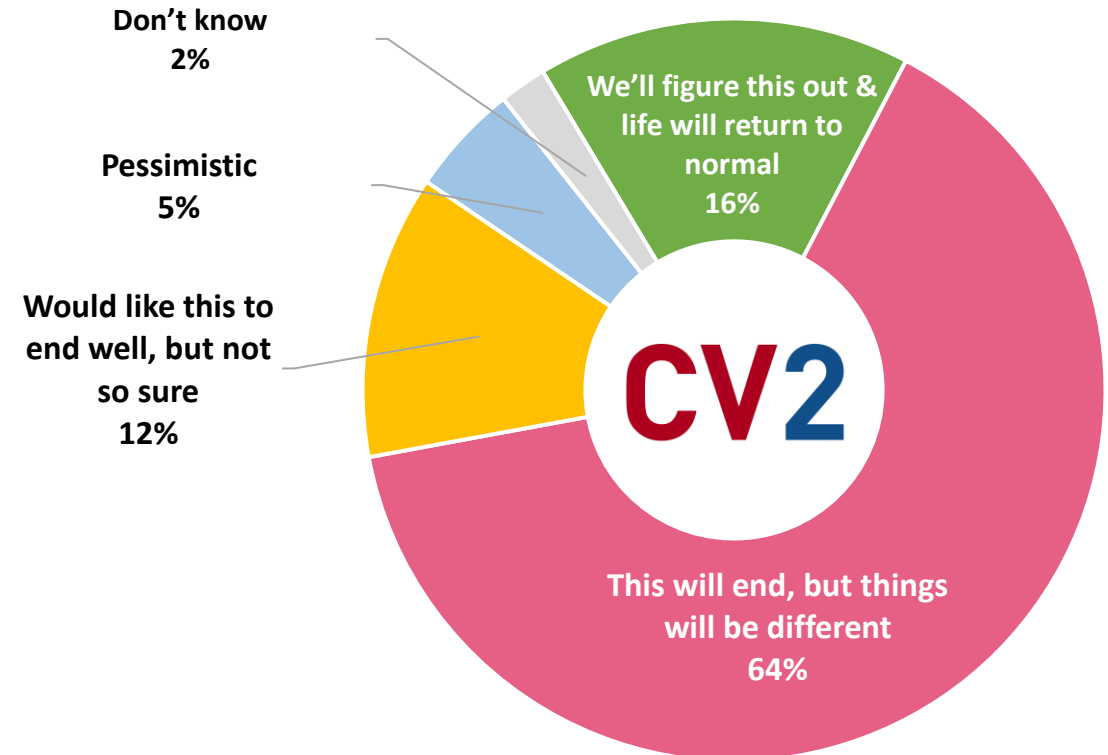


A Stronger Majority Feel Things Will Be “Different” When the COVID-19 Crisis Ends, With Fewer Seeing a Return to Normal

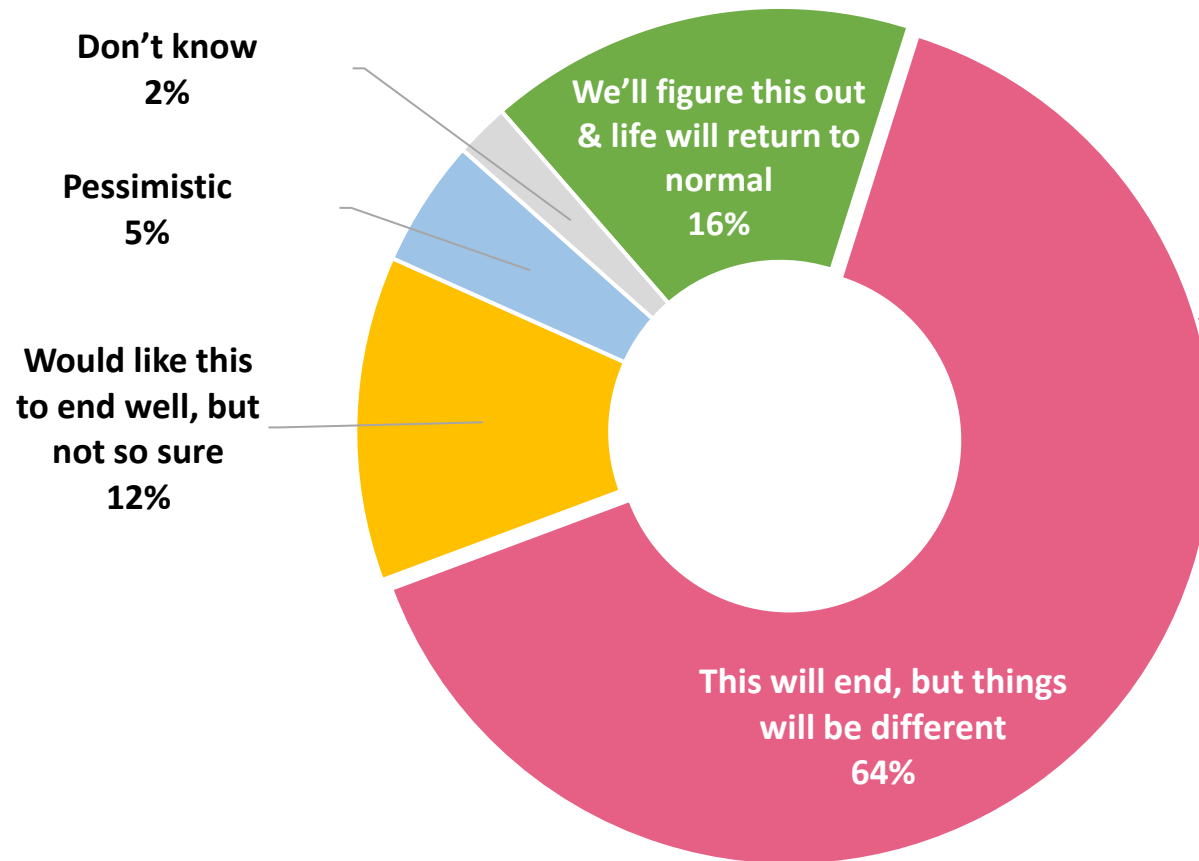
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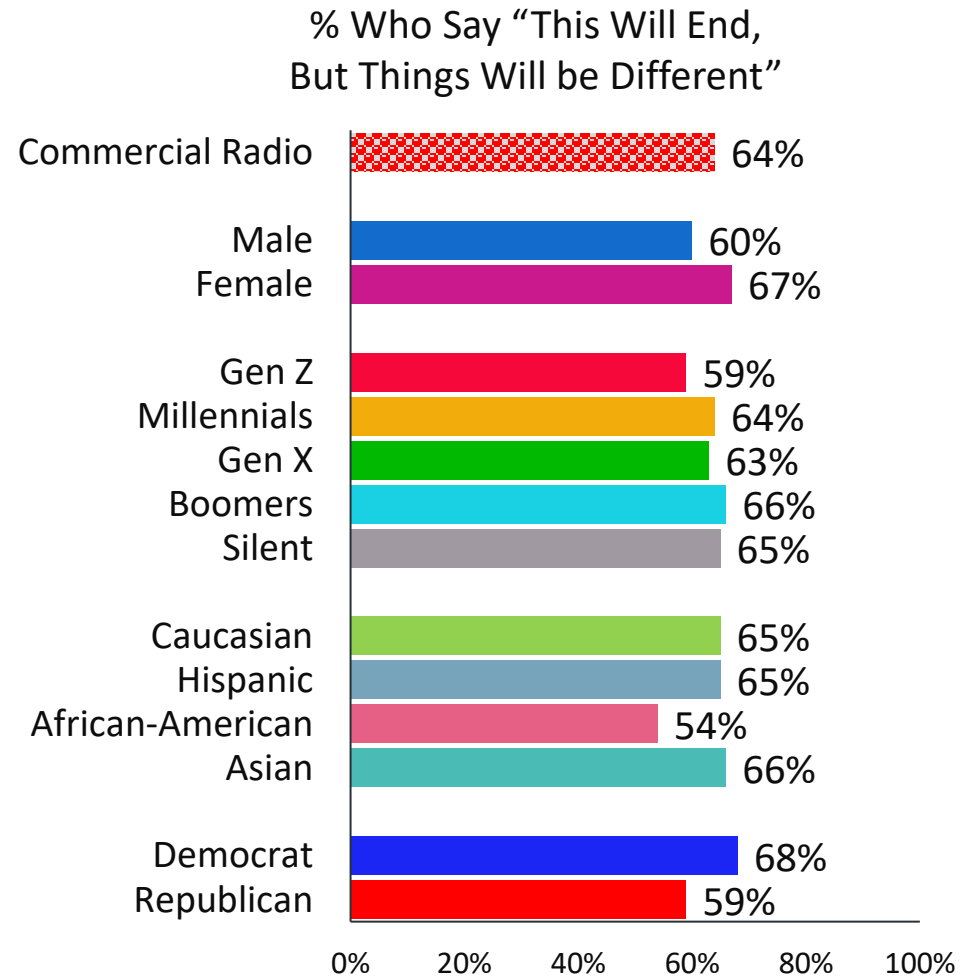
May 2020

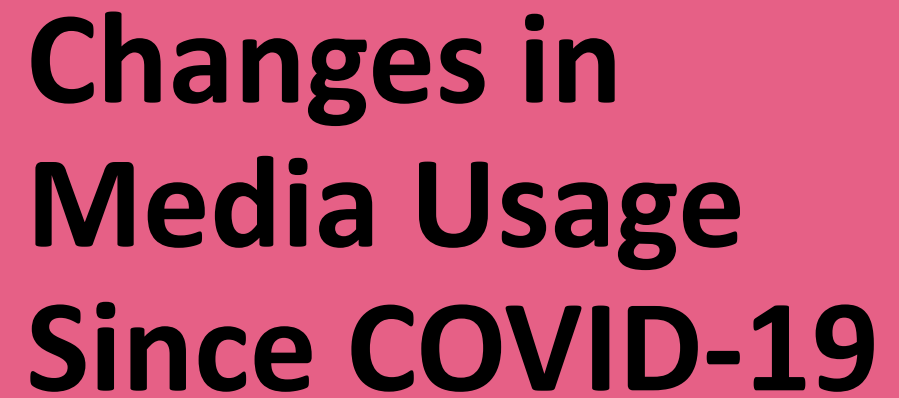


Nearly Two in Three Feel Things Will Be “Different” When the Coronavirus Crisis Ends

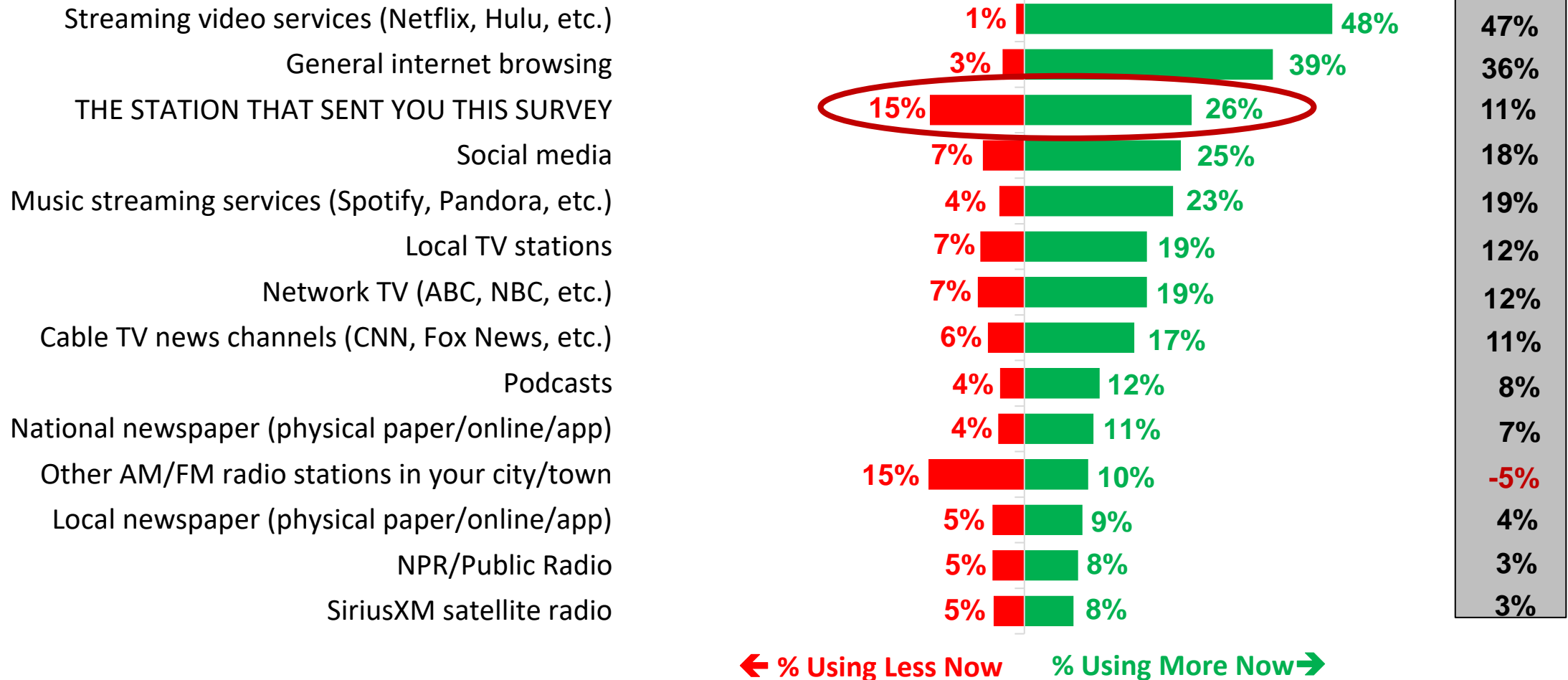


"Which best describes how you think the coronavirus outbreak will end?"

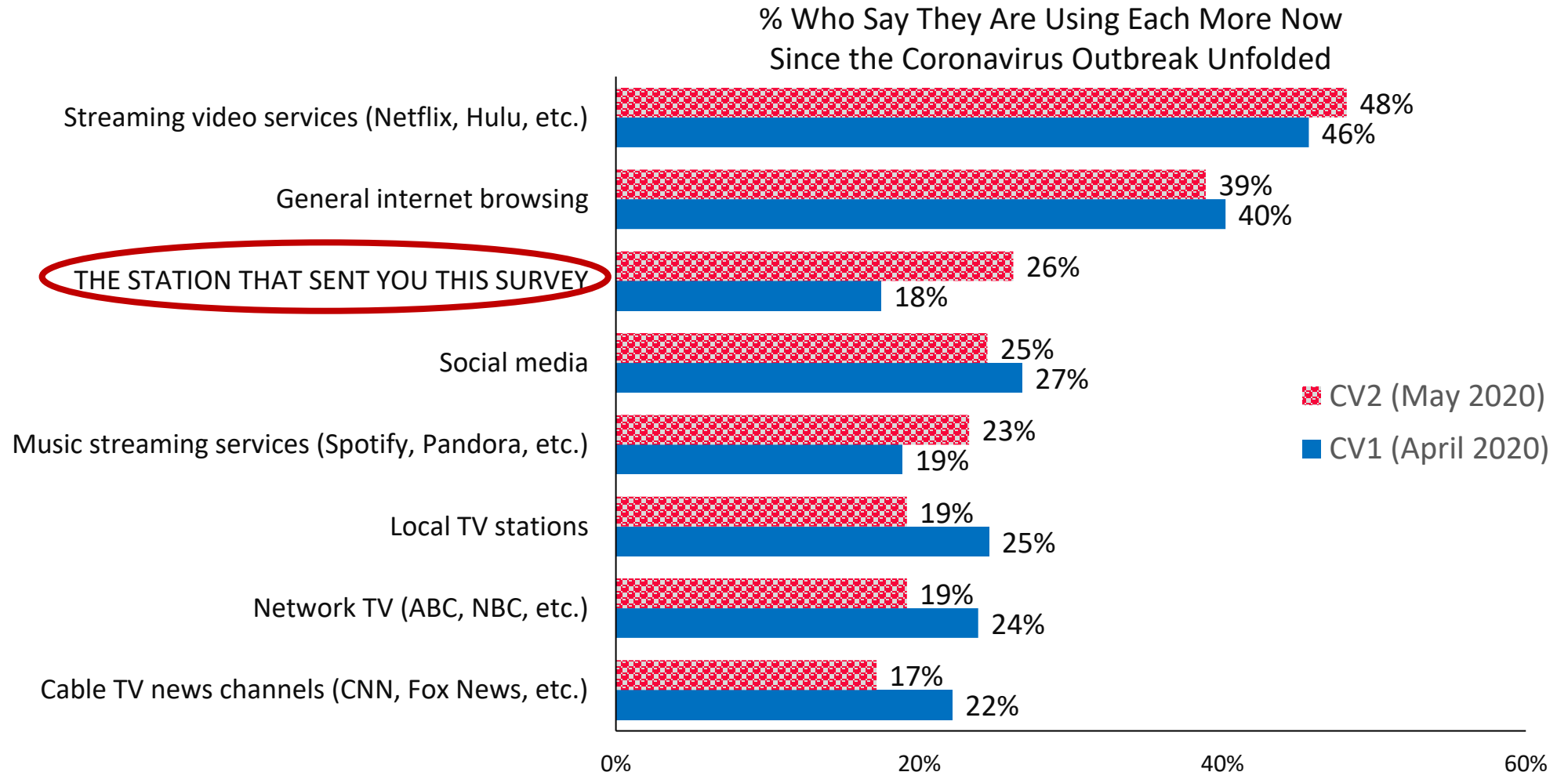




Since COVID-19, Home Station Listening Is Up; Streaming Video and Internet Usage Show Solid Increases



Six Weeks Later, Audio Shows the Largest Usage Increases, With Most TV (Beyond Netflix) Declining

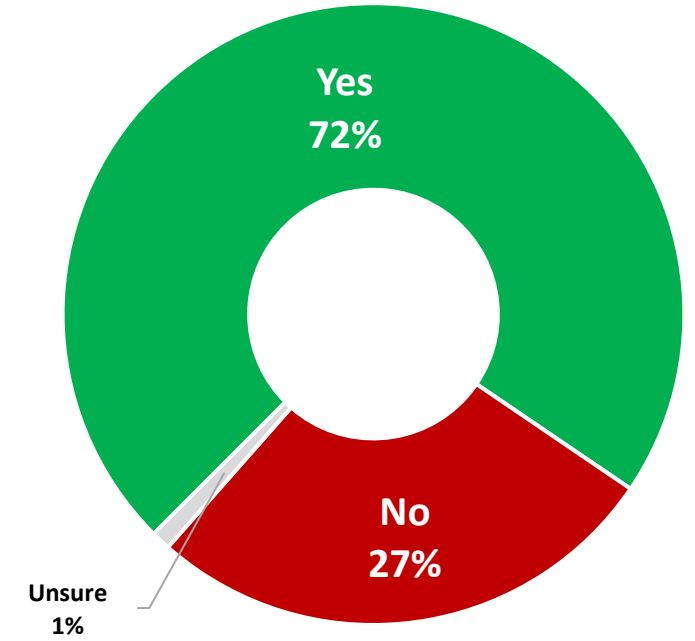
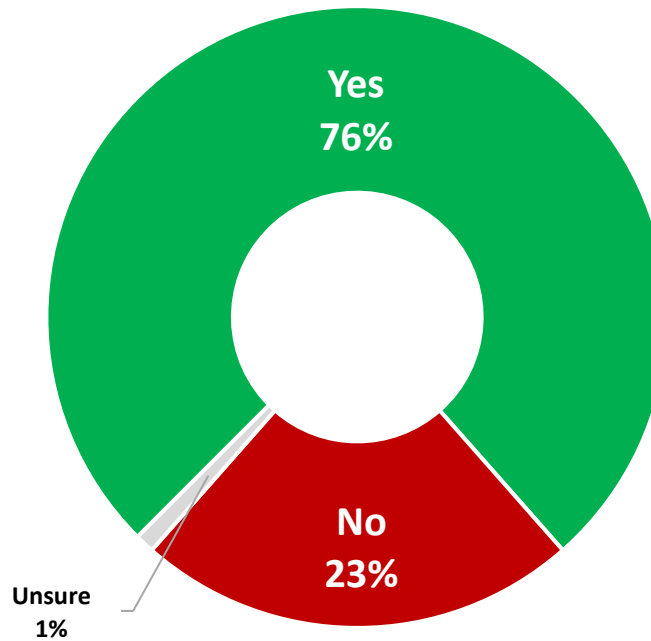
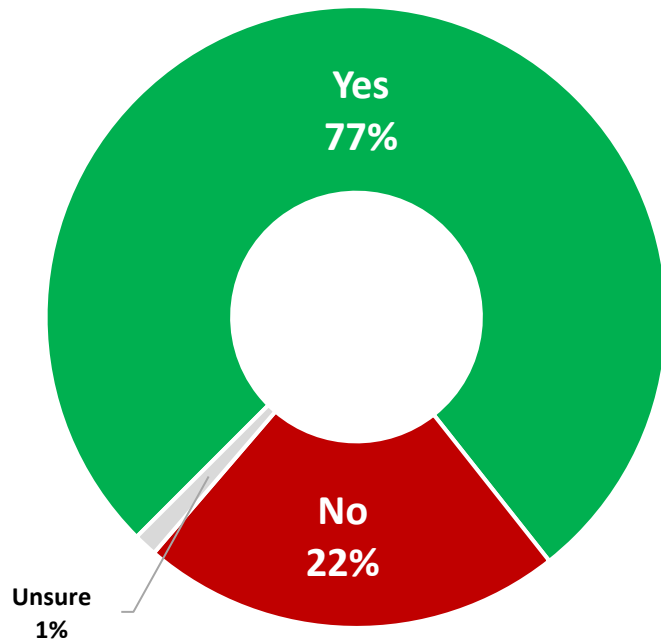


More Than One-Fifth Do NOT Have a Working Radio in Their Homes That They Use

Commercial Radio

Public Radio

Christian Music Radio

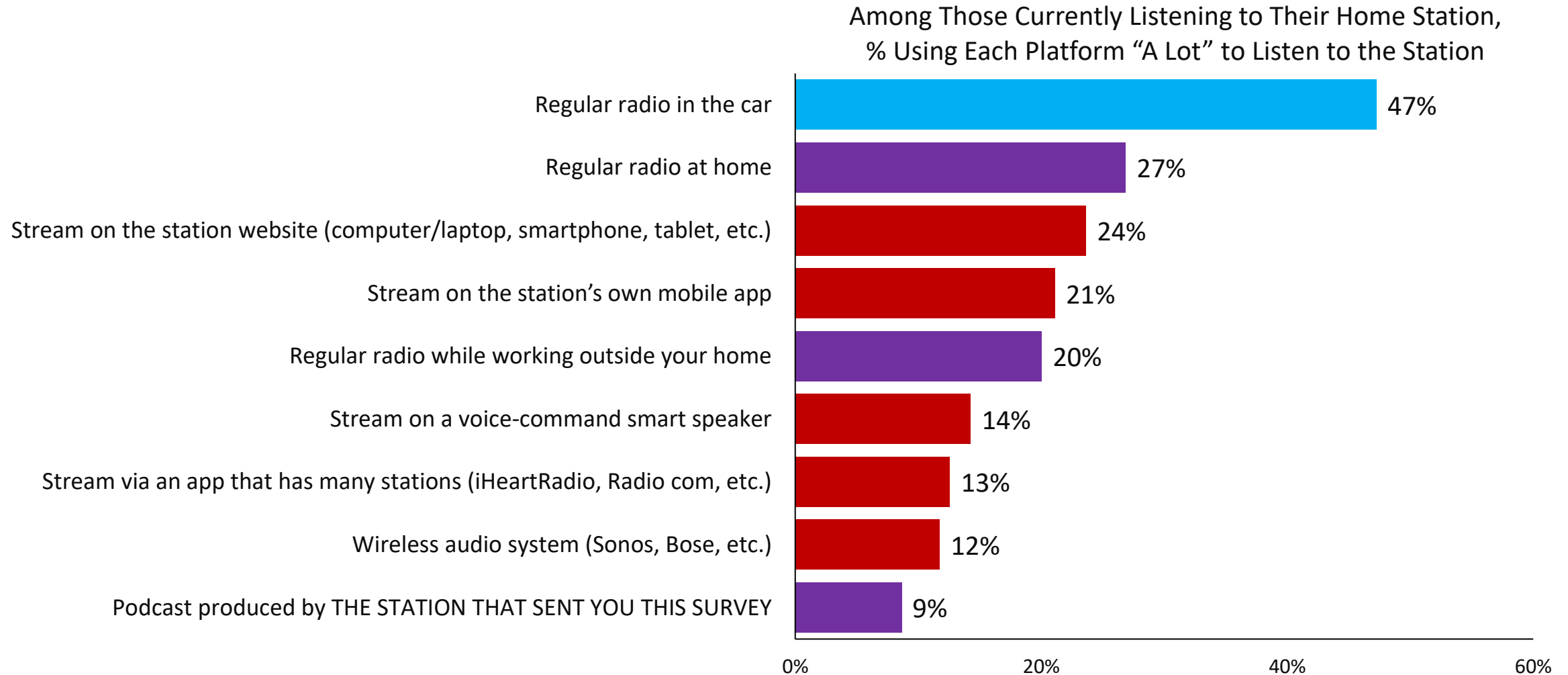


"In your home, do you have a working radio that you use?"



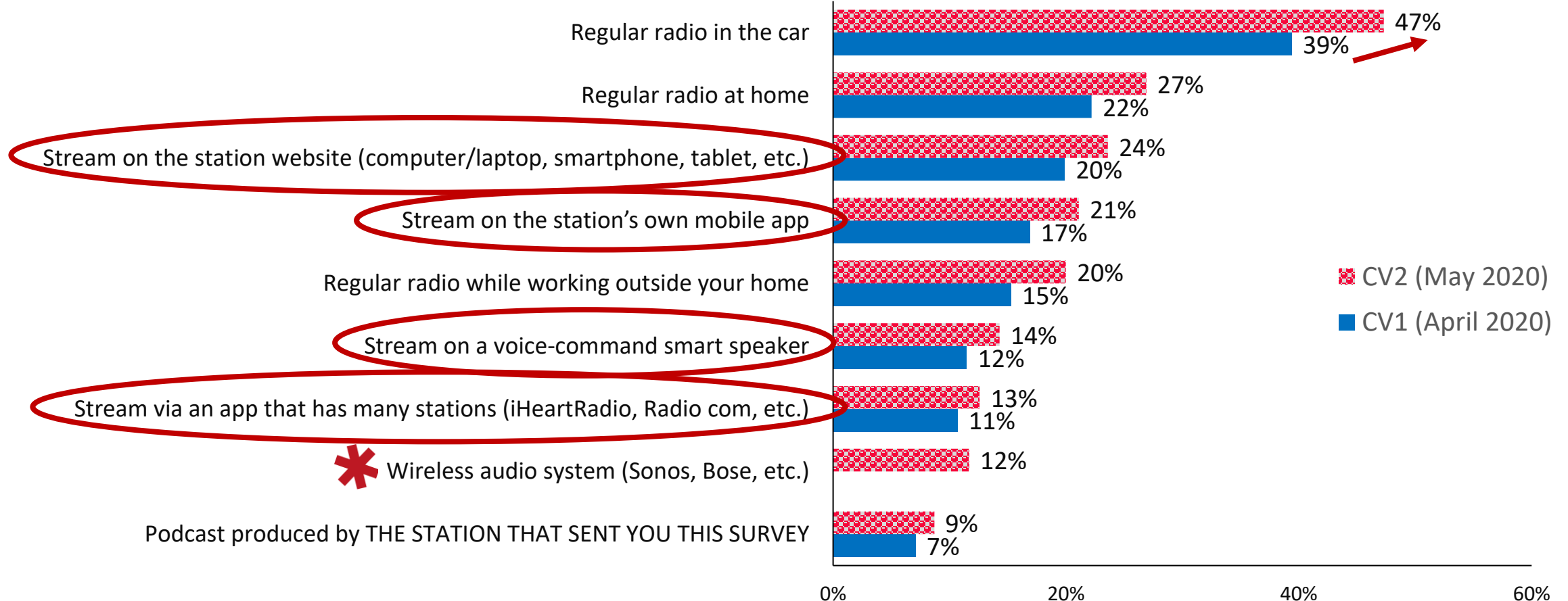
Radio Listening & The Coronavirus

In-Car Listening Leads (Just Like “Normal”) While Streaming on Various Devices Looks Solid



In Six Weeks, Radio Listening Across Platforms Has Begun to Rebound; Streaming on Various Devices Continues to Take Hold

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



Six in Ten Give Their Home Station “Excellent” Ratings Since the Coronavirus Outbreak

Don't know/haven't listened

4%

Poor
1%

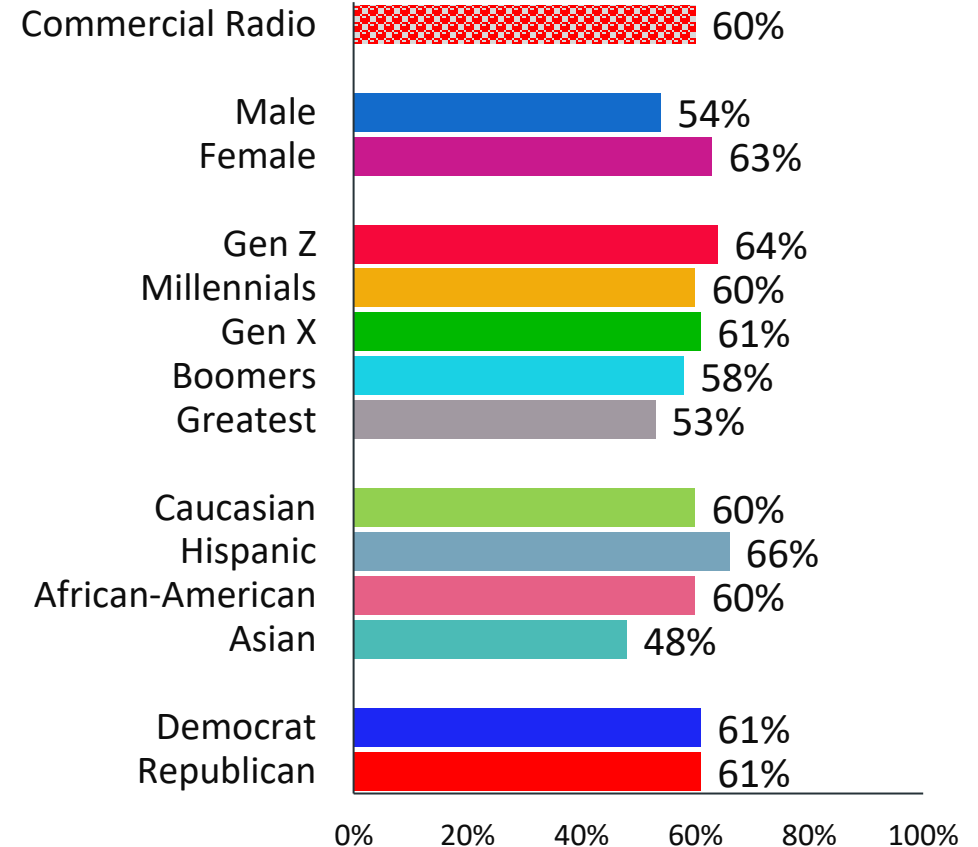
Fair
5%

Good
31%

Excellent
60%

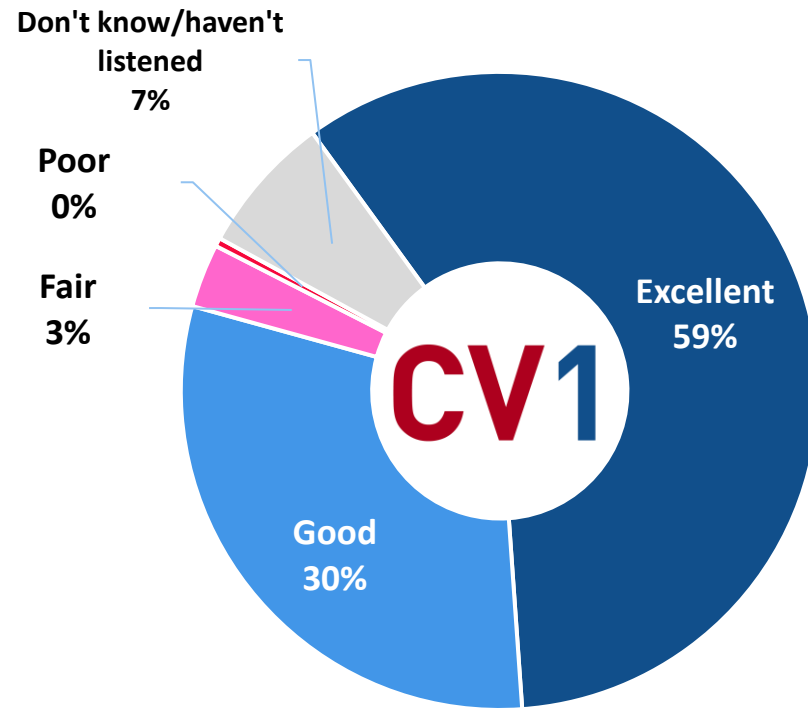
“Think about your listening to THE STATION THAT SENT YOU THIS SURVEY. How would you rate the station SINCE the start of the coronavirus outbreak?”

% Who Rate Their Home Station as “Excellent”

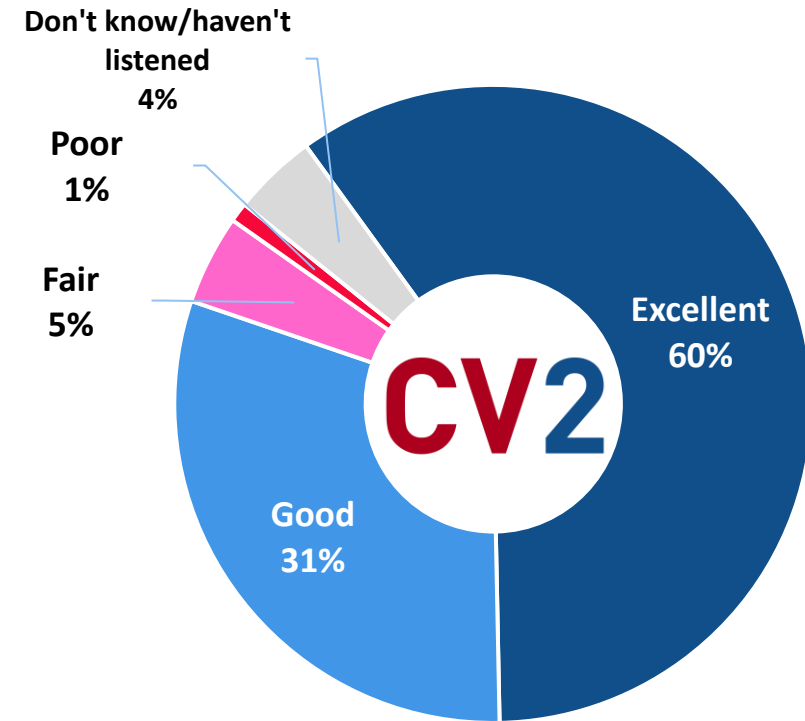


Six in Ten Rate Their Home Station “Excellent” Since the Coronavirus Outbreak

April 2020

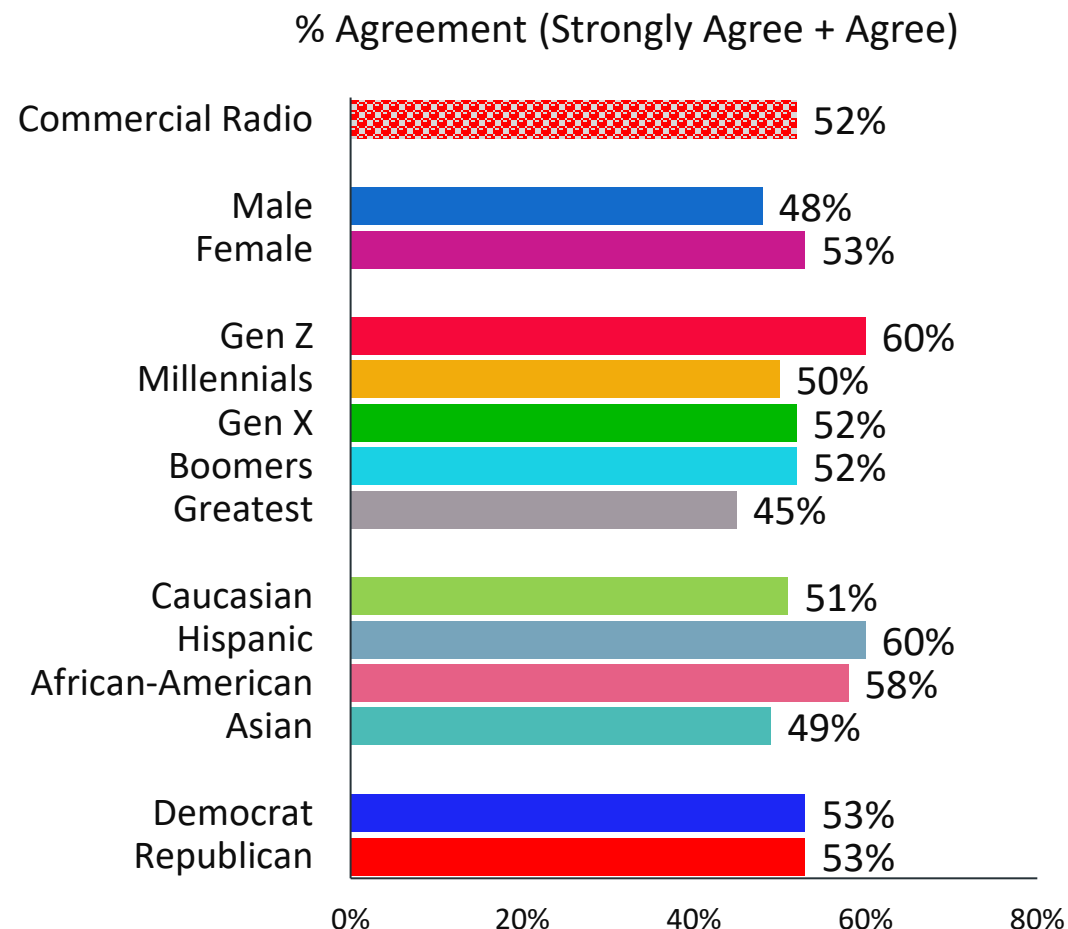
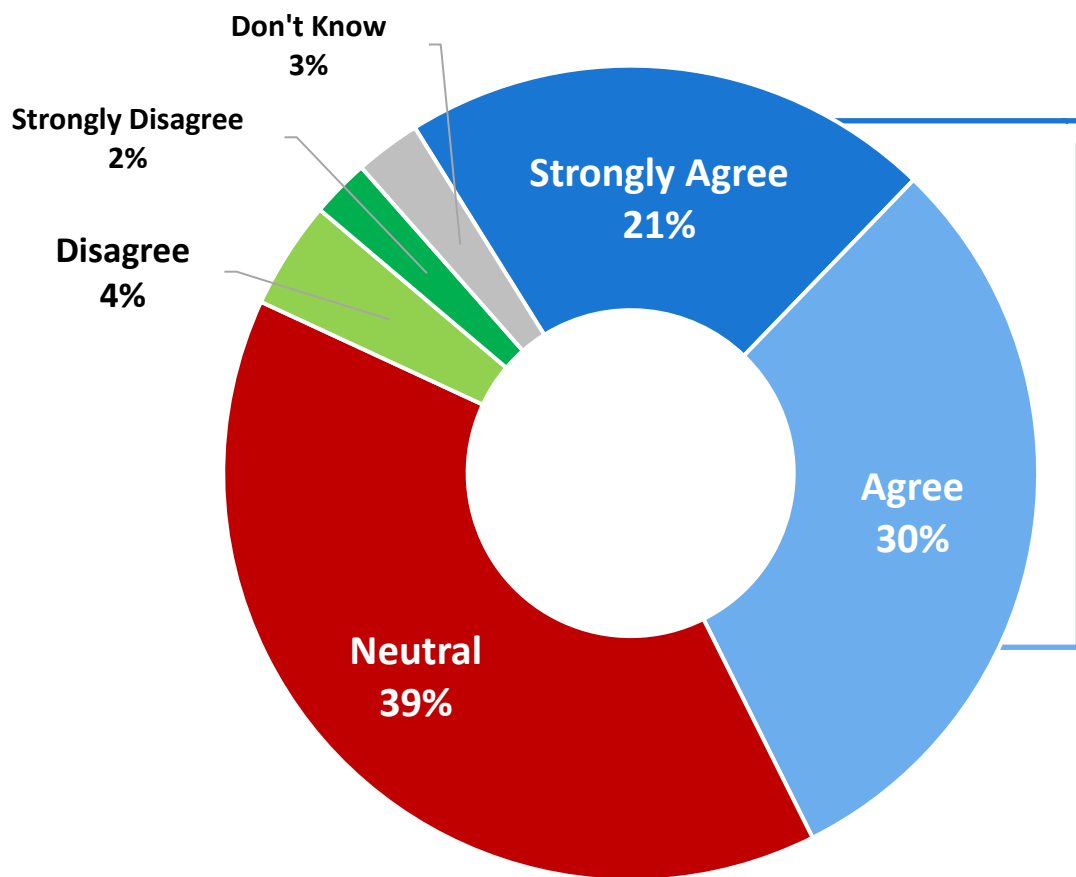


May 2020



*“Think about your listening to THE STATION THAT SENT YOU THIS SURVEY.
How would you rate the station SINCE the start of the coronavirus outbreak?”*

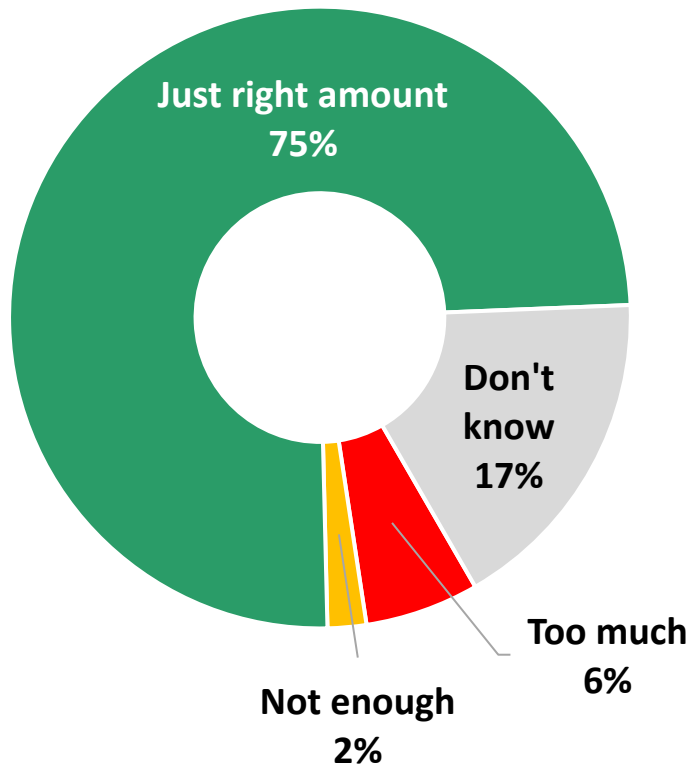
Half Say They Feel a Stronger Connection to Their Favorite Station Since the Start of the Pandemic



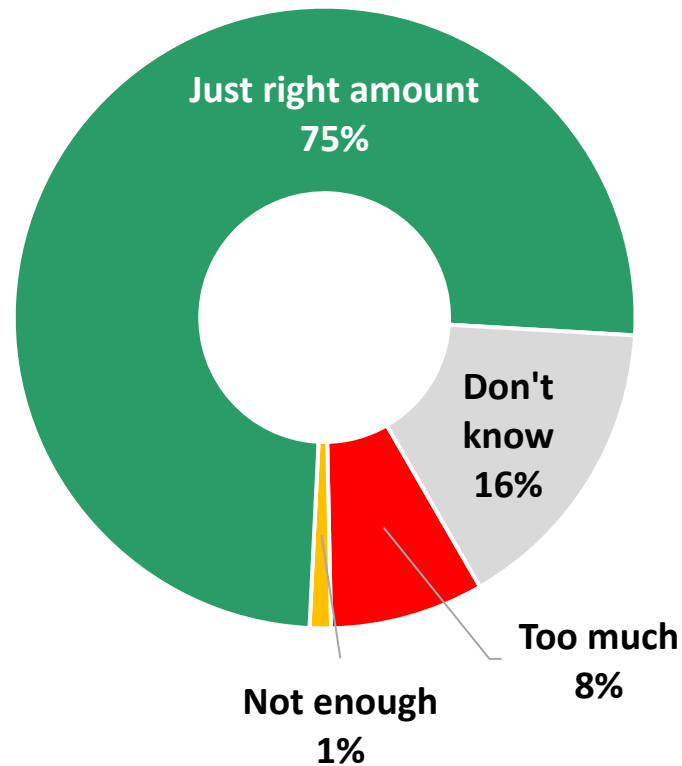
"Since the start of the coronavirus outbreak, I feel a stronger sense of connection with THE STATION THAT SENT ME THIS SURVEY"

Three in Four Feel Their Home Station Is Paying the Right Amount of Attention to COVID-19

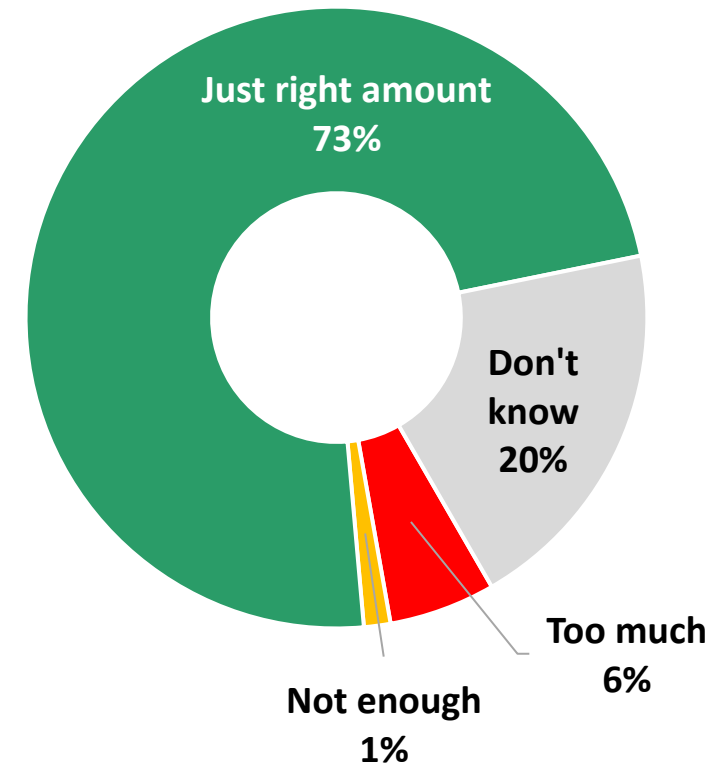
Commercial Radio



Public Radio

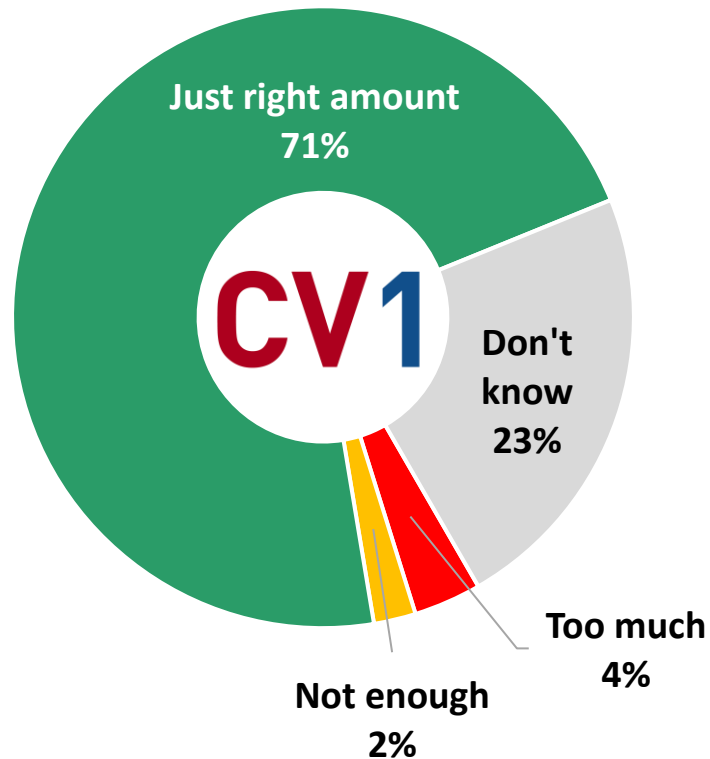


Christian Music Radio

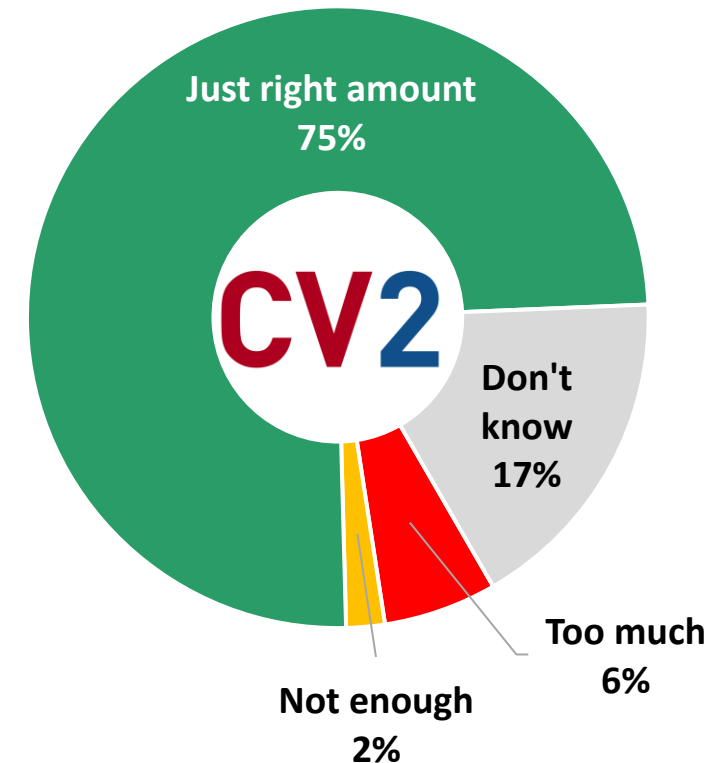


Three in Four Feel Their Home Station Is Paying the Right Amount of Attention to COVID-19

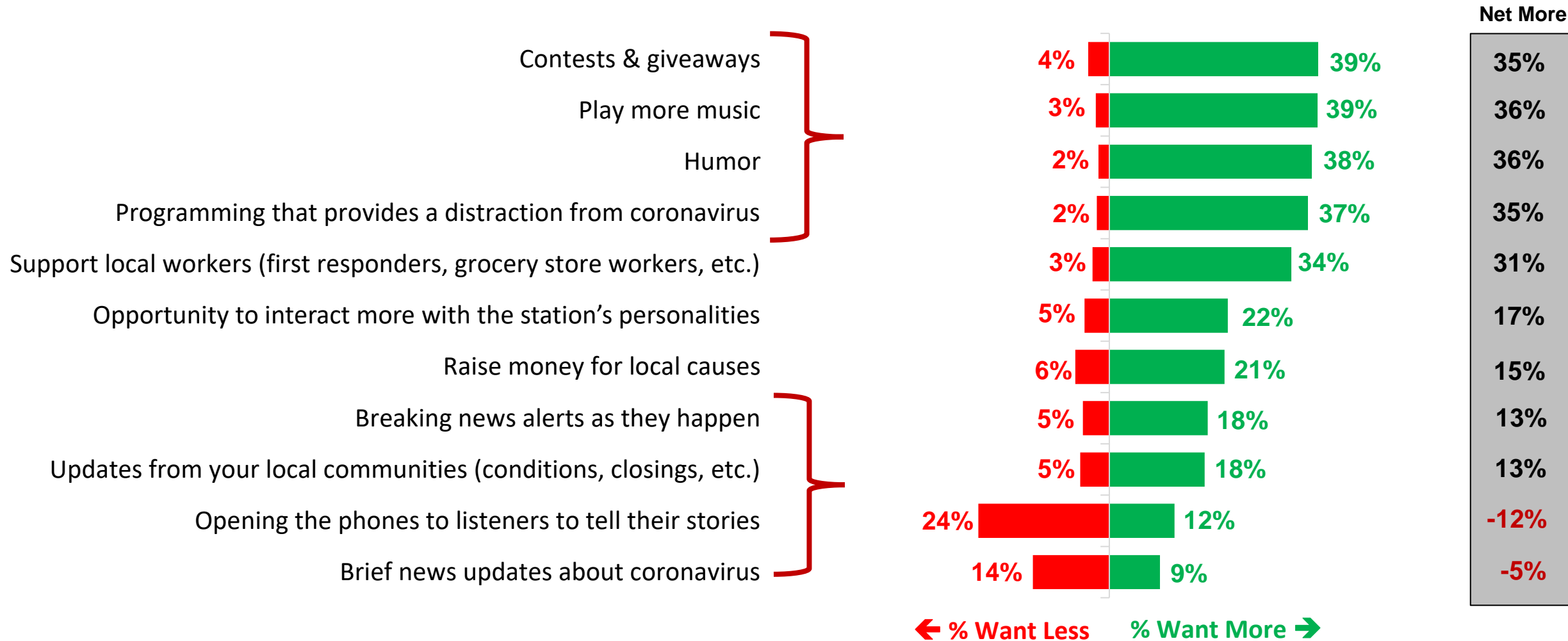
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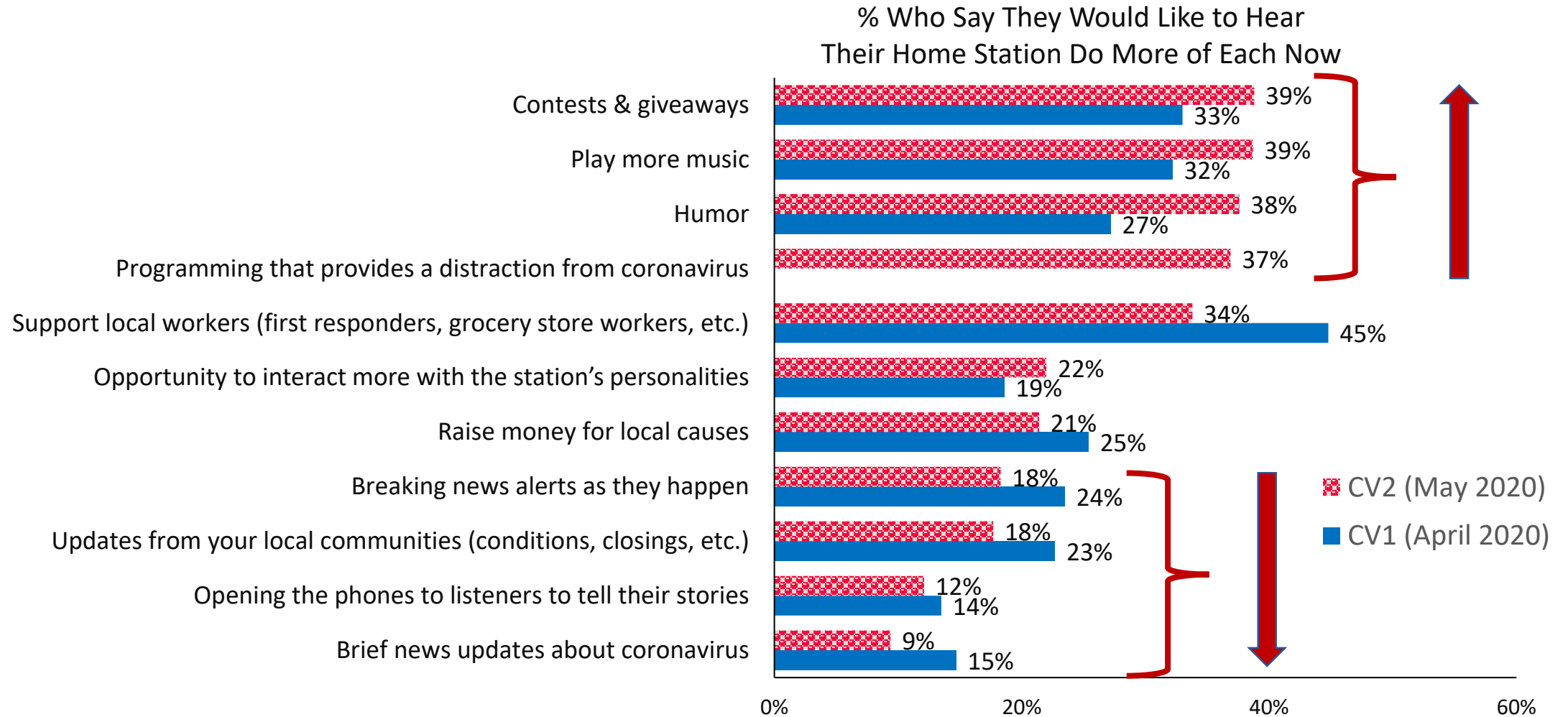


Music, Humor, and Contesting, and Programming Distractions Lead Radio's Top Priorities Now



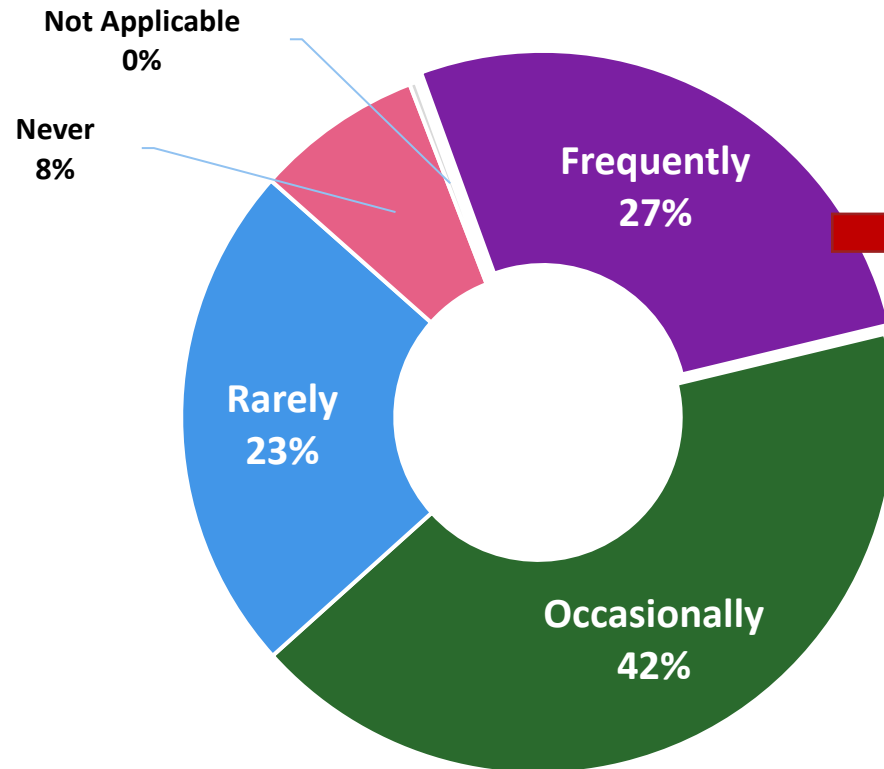
"Think about THE STATION THAT SENT YOU THIS SURVEY and what you'd like to hear from them as the coronavirus outbreak has unfolded. Would you like this station to do MORE, LESS, or about the SAME AMOUNT of:"

“Normal” Radio Activities Are Now More Desirable Than COVID-19 Information and Features

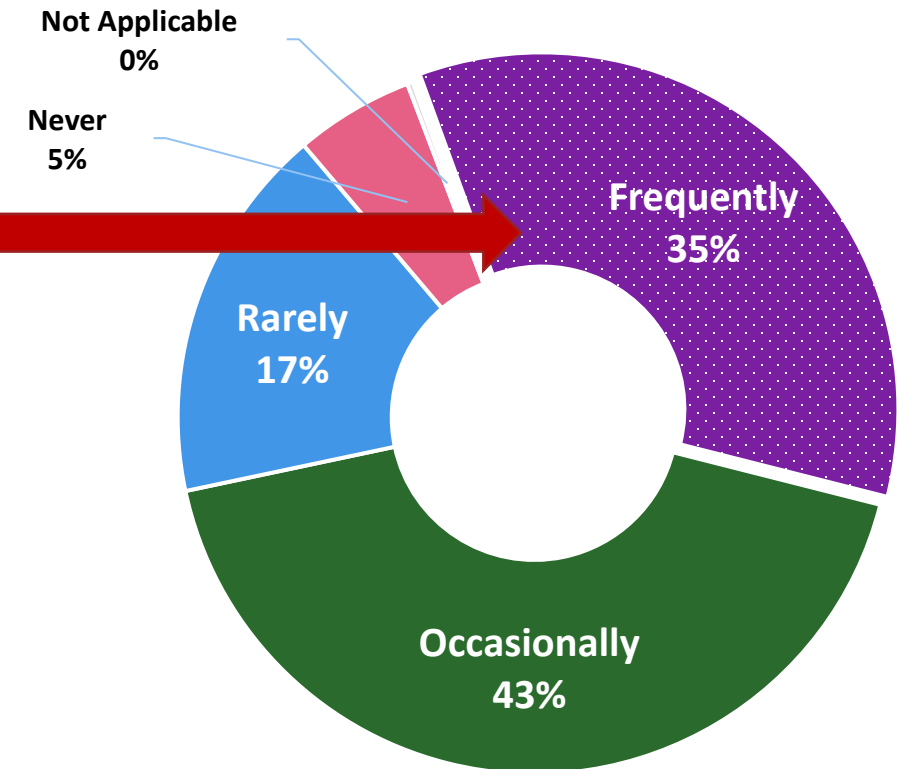


There Is More Frequent Interest in Local News Coverage on the Pandemic Than National News

Those Seeking National COVID-19 News Coverage



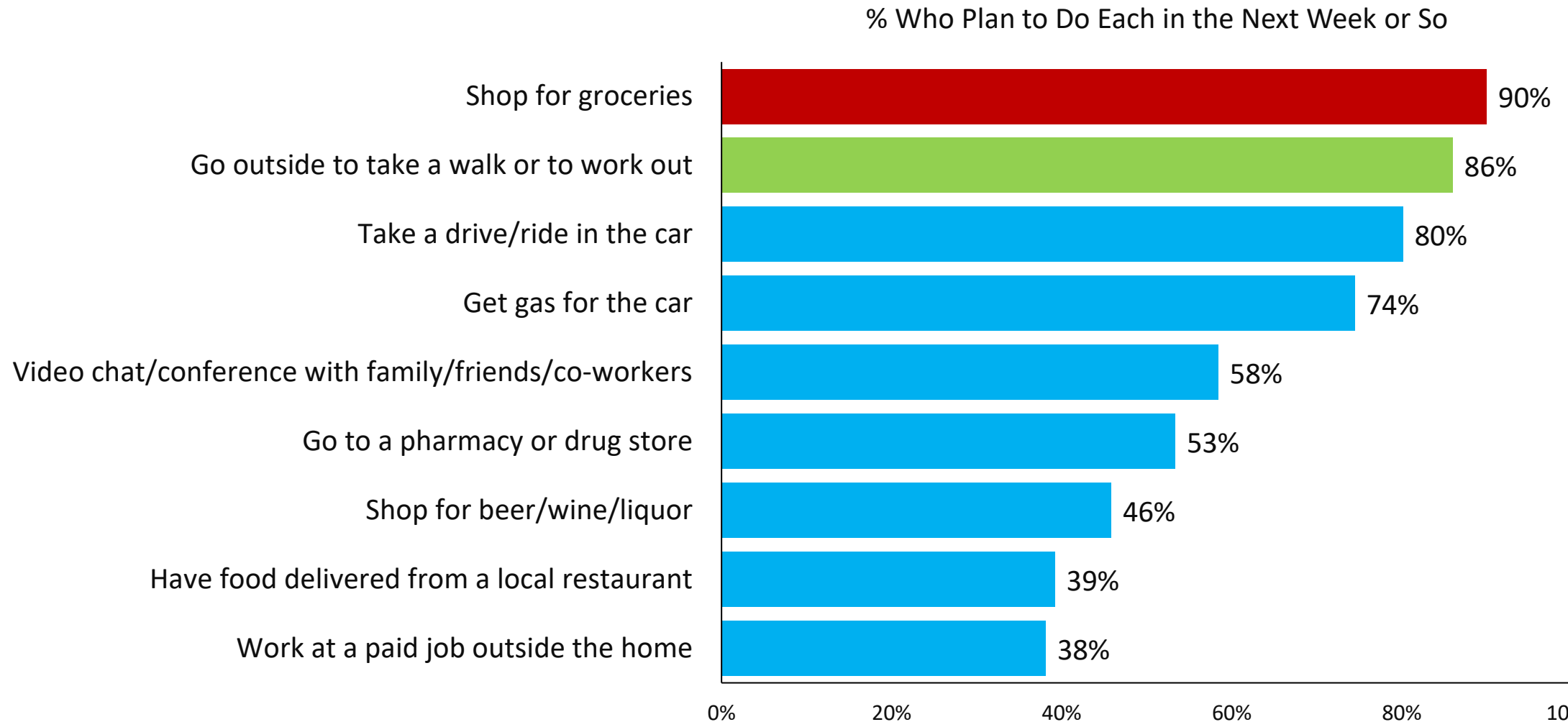
Those Seeking Local COVID-19 News Coverage



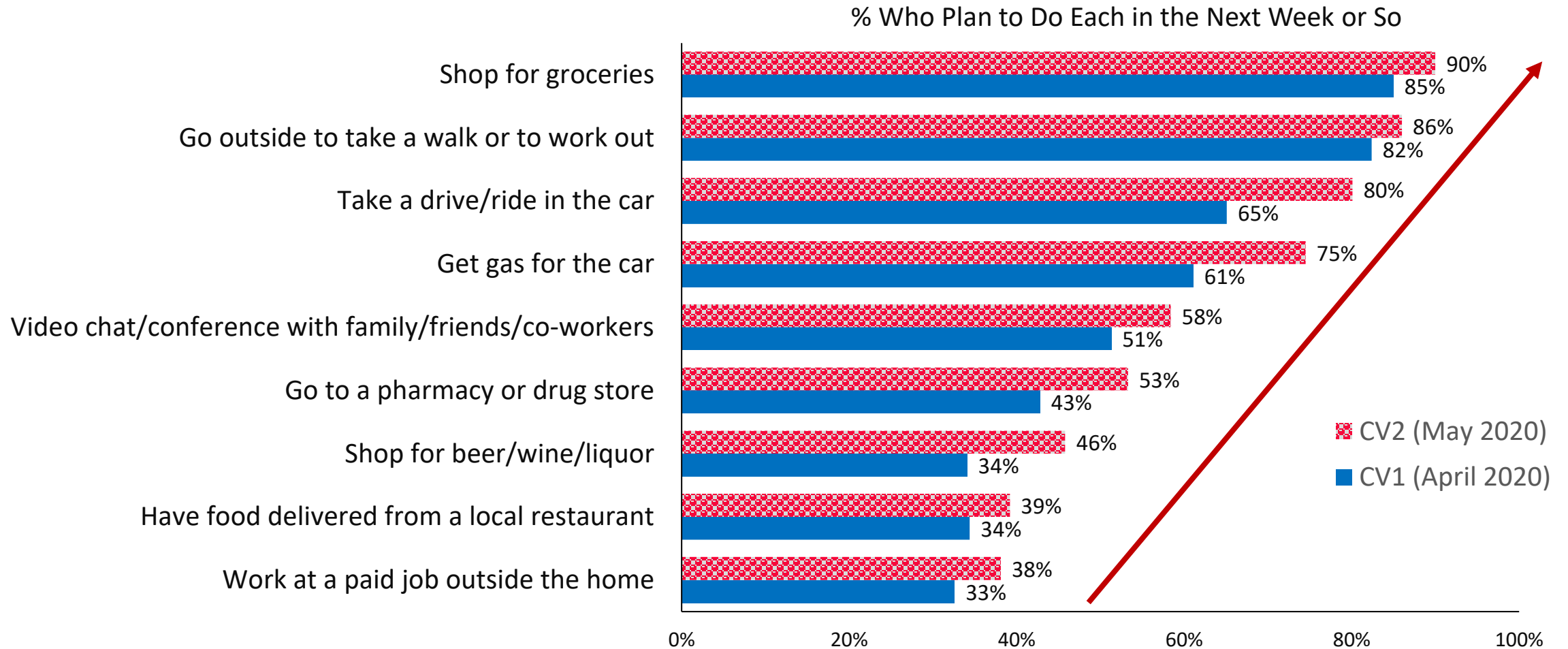


Consumer Buying & Shopping Behavior

In the Coming Week, Most Plan to Grocery Shop, Walk/Workout, and Take a Drive/Ride in the Car



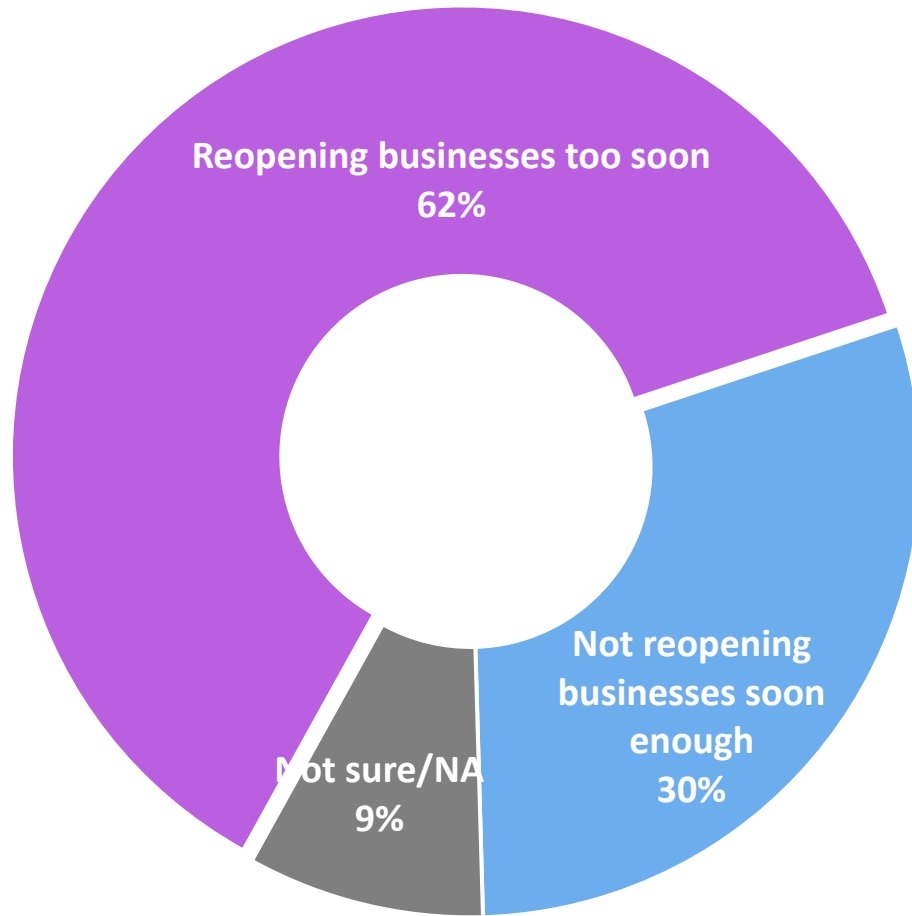
Compared to Six Weeks Ago, There Is More Planned Participation in the Coming Week For All Activities





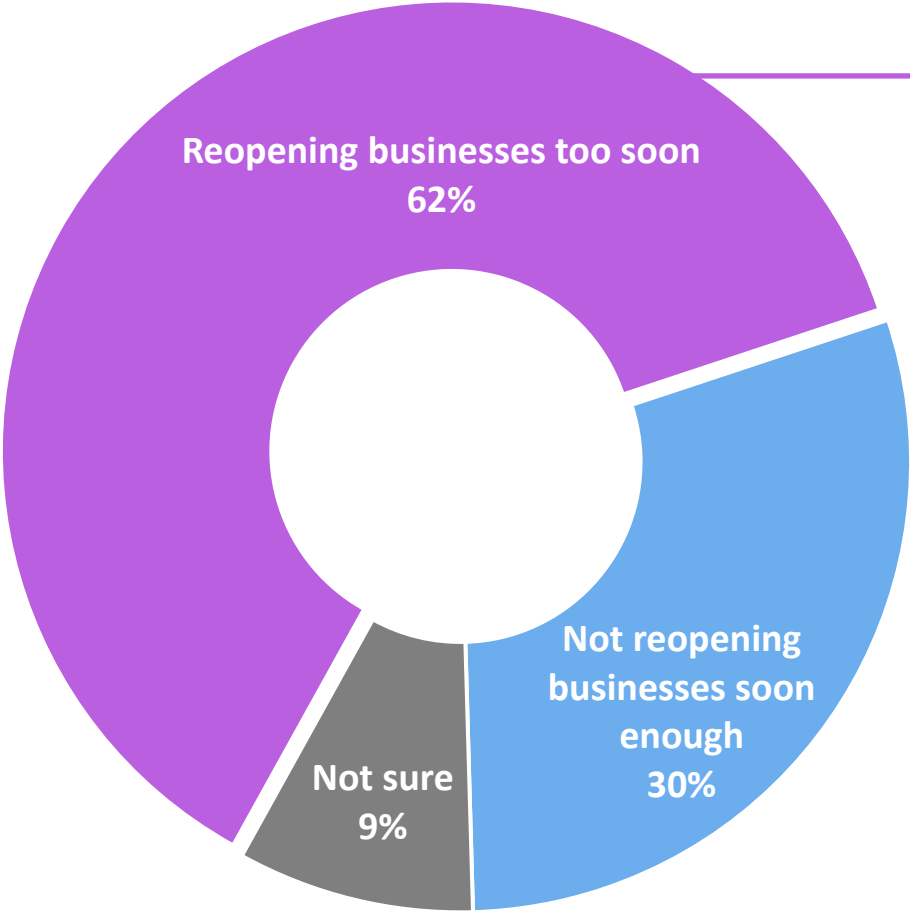
Interest in Activities vs. Risk

More Than Twice As Many Are Concerned About Opening Businesses Too Soon Rather Than Not Soon Enough

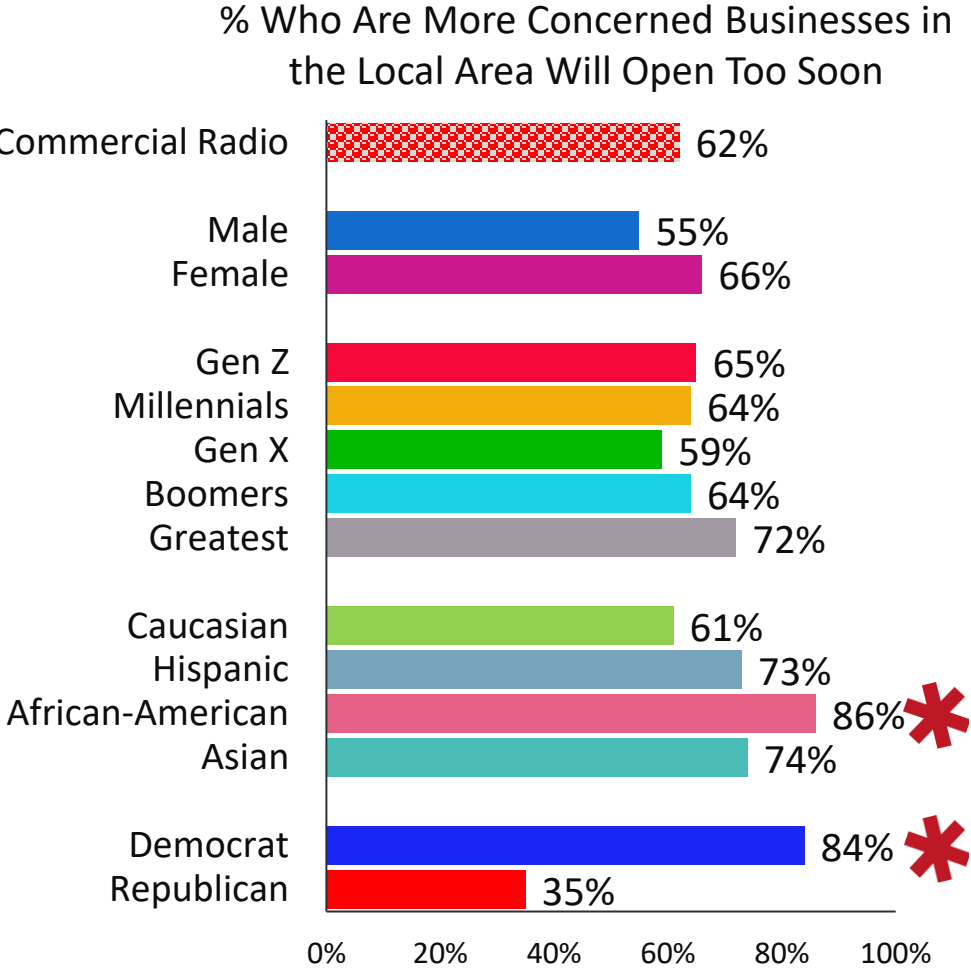


“Which of the following is a bigger concern to you in your local area?”

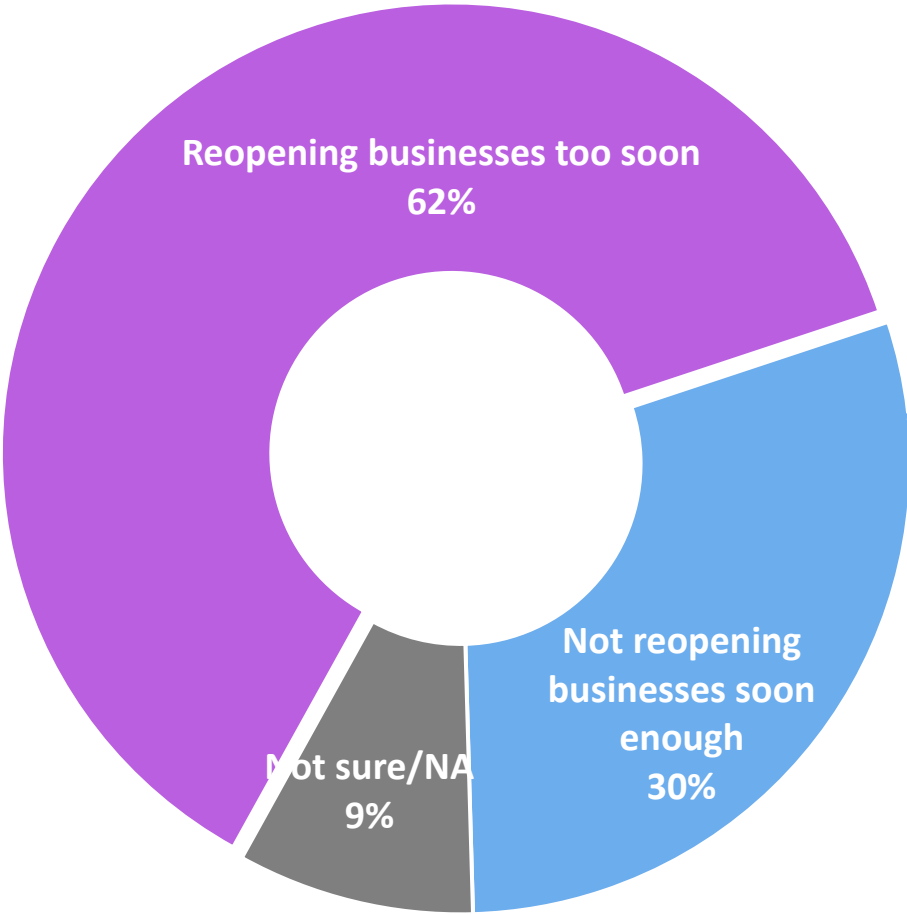
African-Americans and Democrats Are More Likely to Be Concerned About Opening Businesses Too Soon



"Which of the following is a bigger concern to you in your local area?"

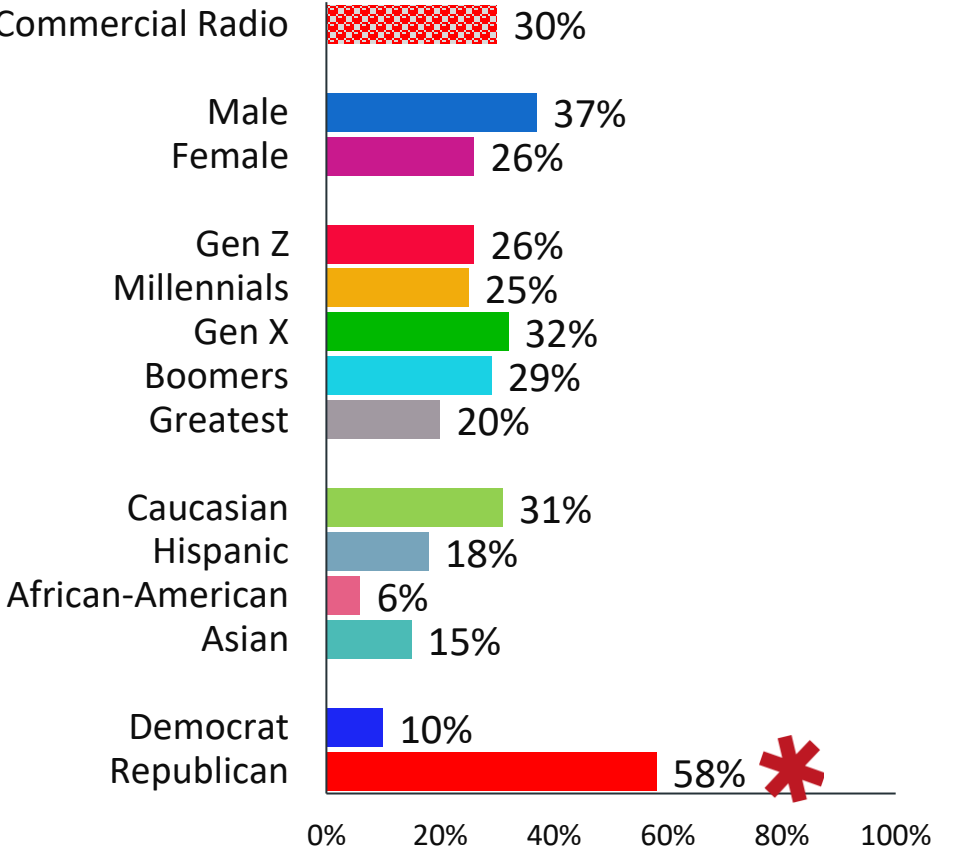


Republicans Are Nearly Twice As Likely To Be Concerned About Businesses Not Opening Soon Enough



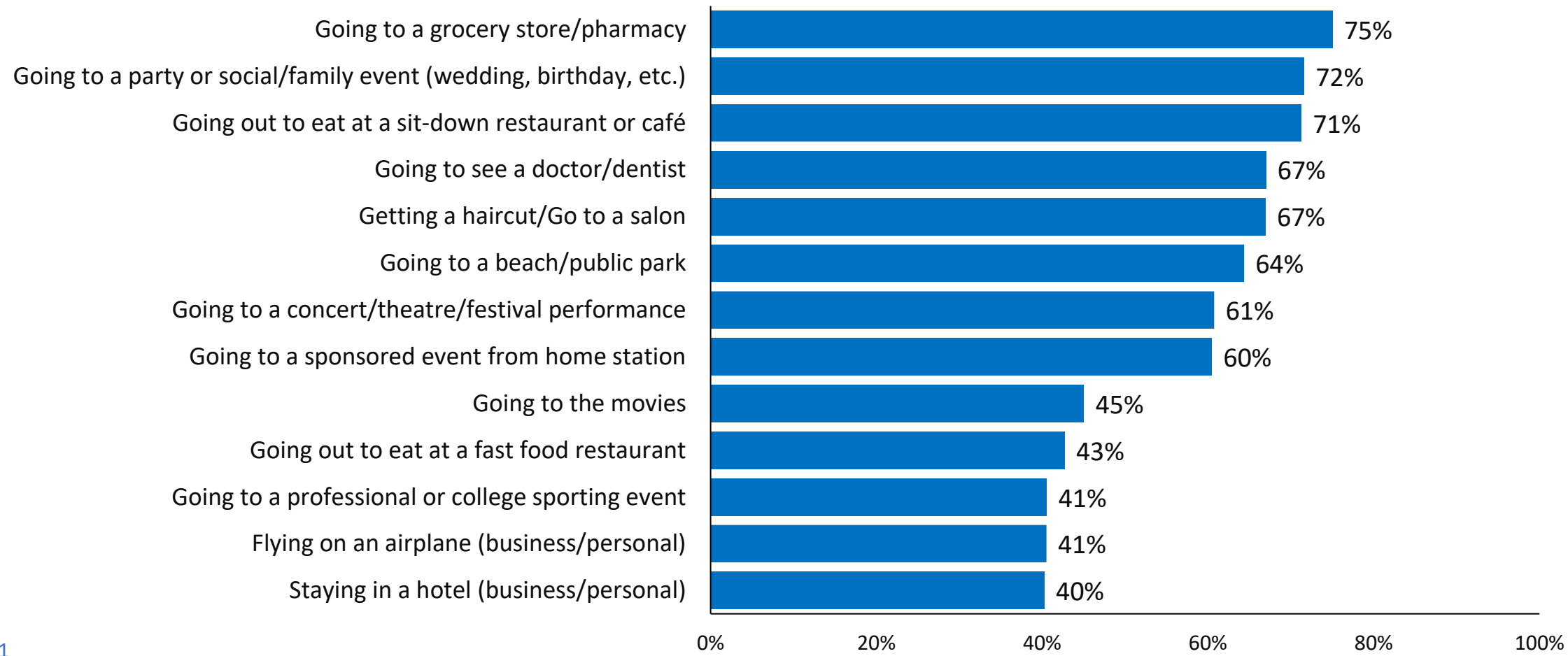
“Which of the following is a bigger concern to you in your local area?”

% Who Are More Concerned Businesses in the Local Area Will Not Open Soon Enough

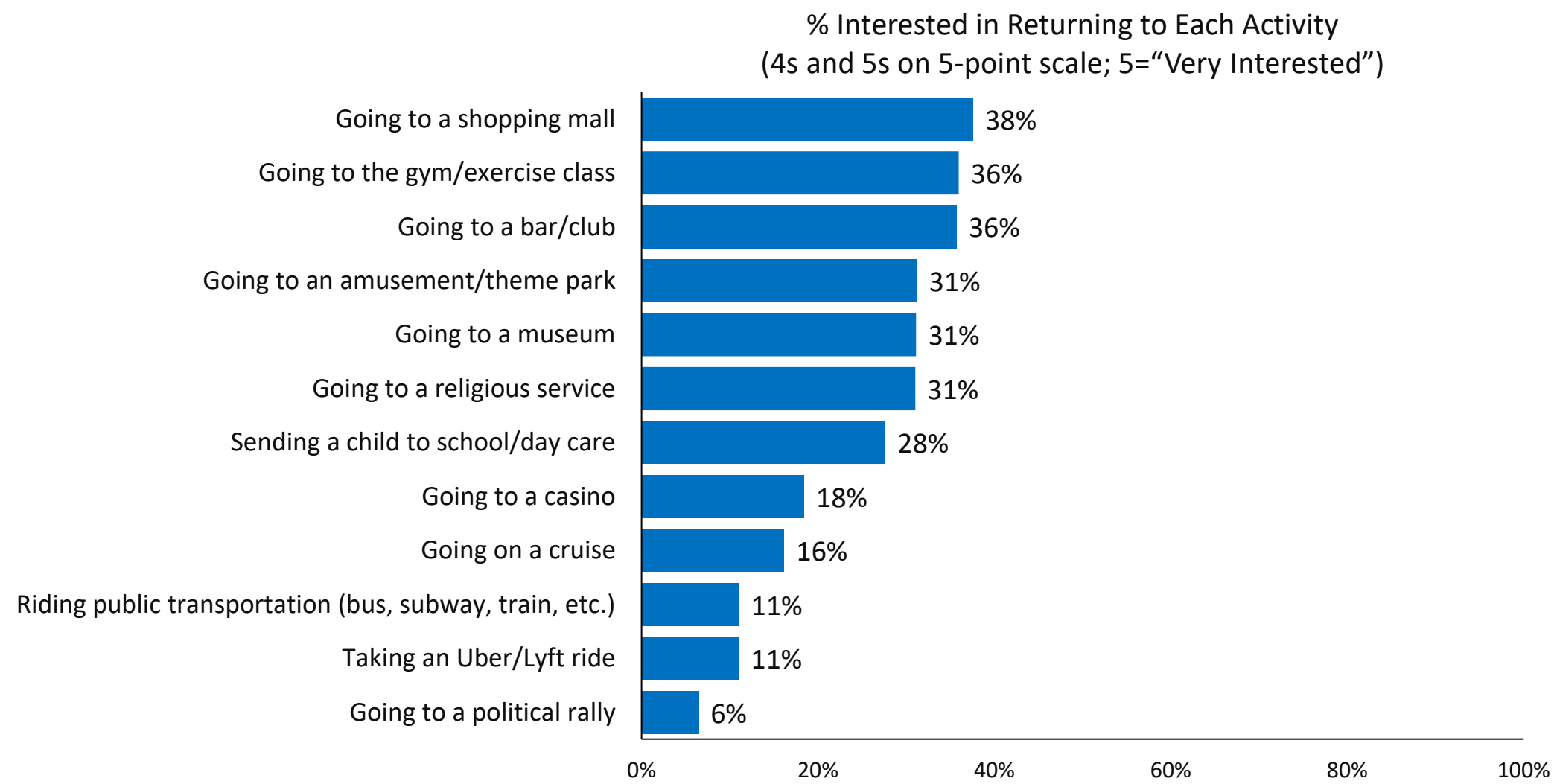


Grocery Shopping, Attending Parties/Social Events and Eating at a Restaurant Are Activities With Highest Interest in Resuming

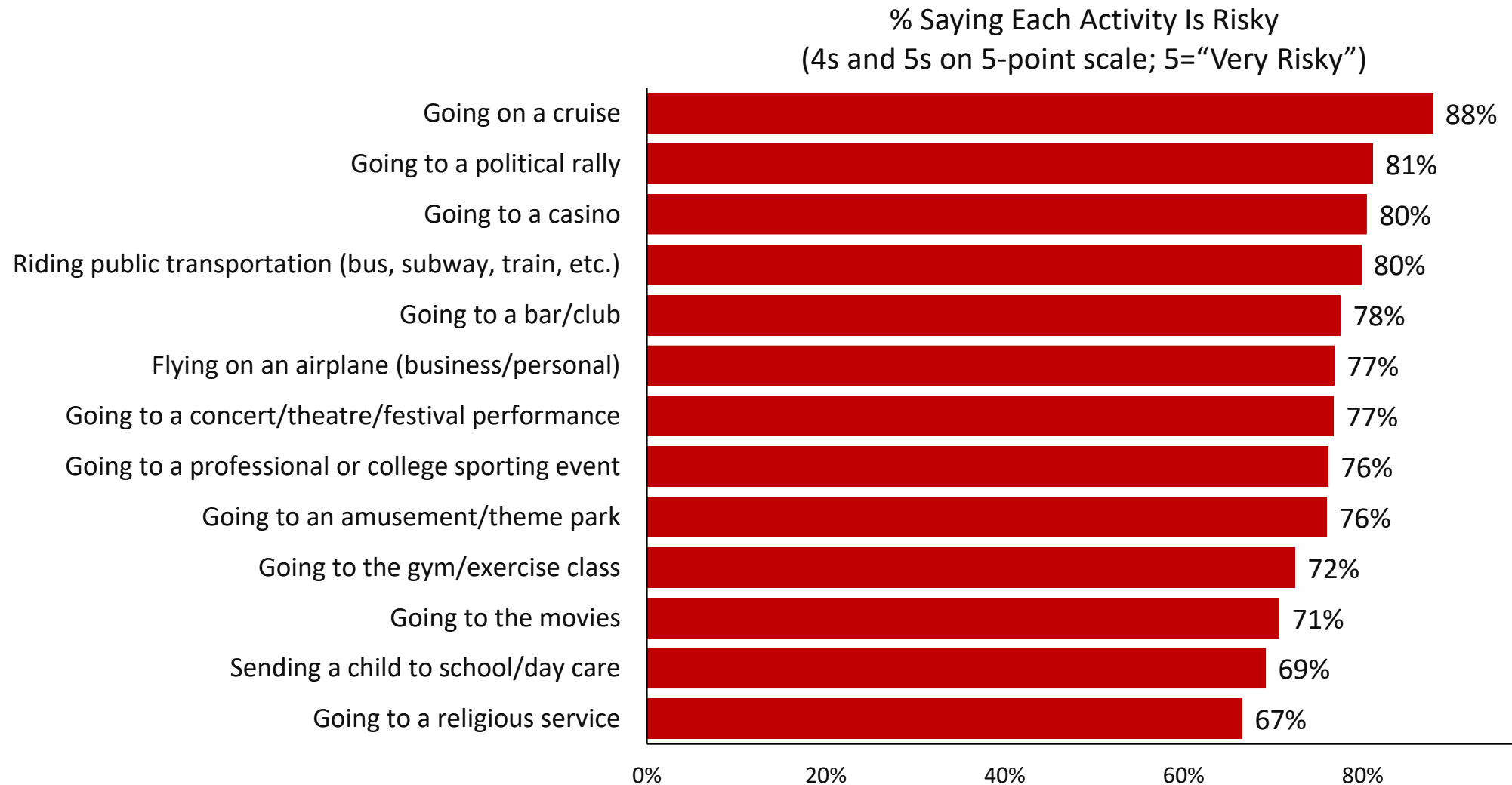
% Interested in Returning to Each Activity
(4s and 5s on 5-point scale; 5=“Very Interested”)



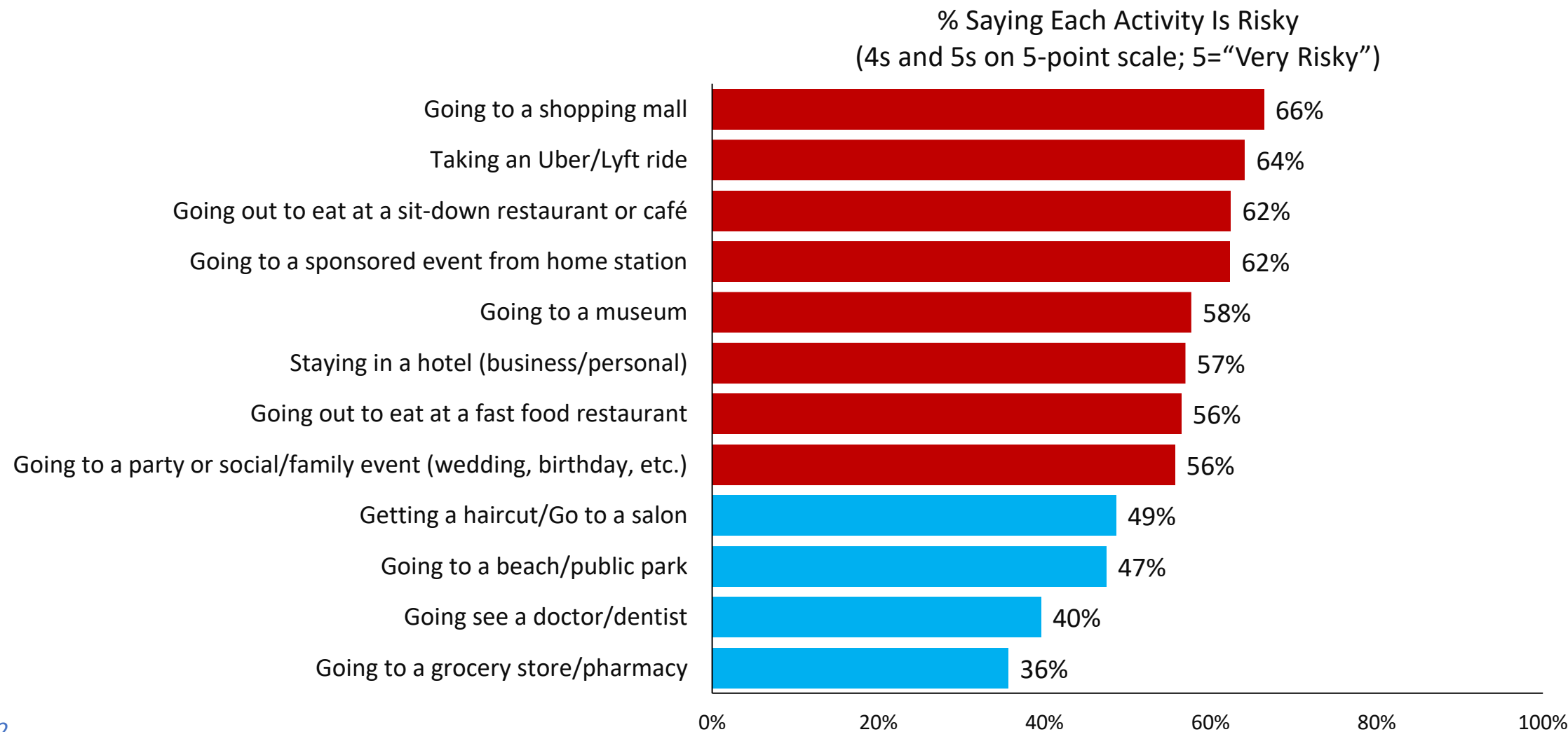
Grocery Shopping, Attending Parties/Social Events and Eating at a Restaurant Are Activities With Highest Interest in Resuming



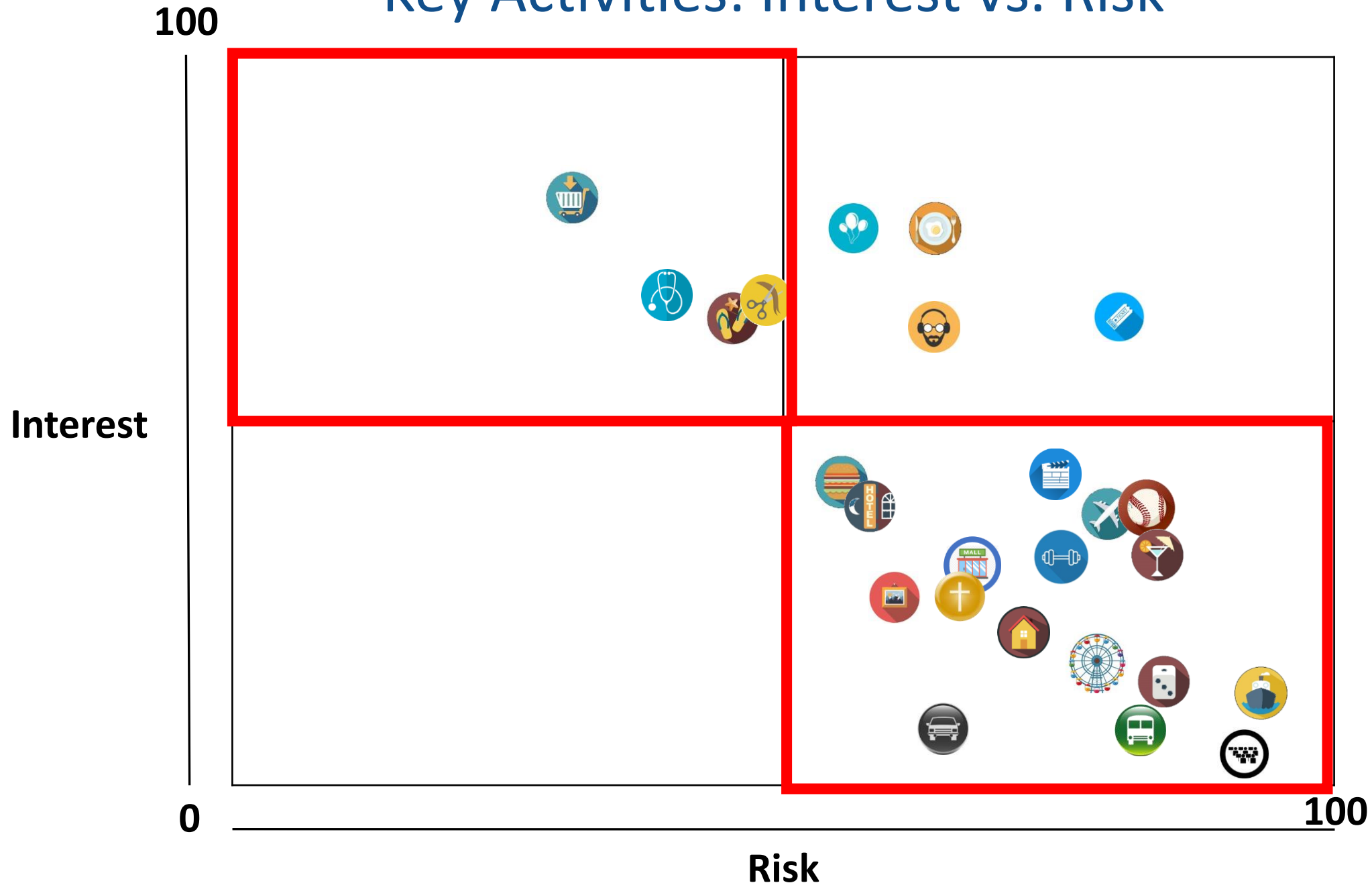
Many Activities Are Seen as Highly Risky By a Majority



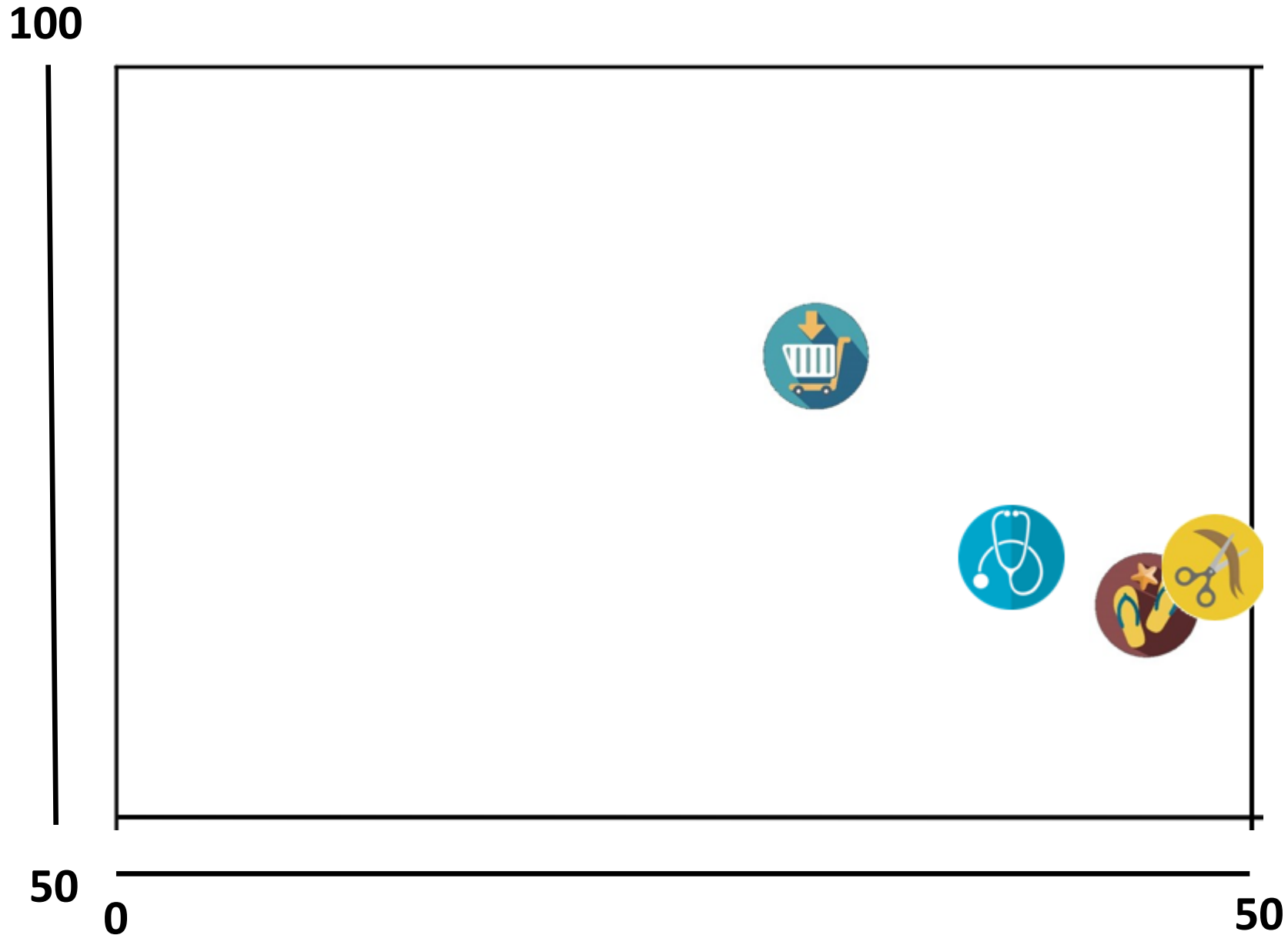
The “Least Risky” Activities: Going to a Grocery Store/Pharmacy, the Doctor/Dentist, Beach/Park, or Hair Salon







Key Activities: Interest vs. Risk

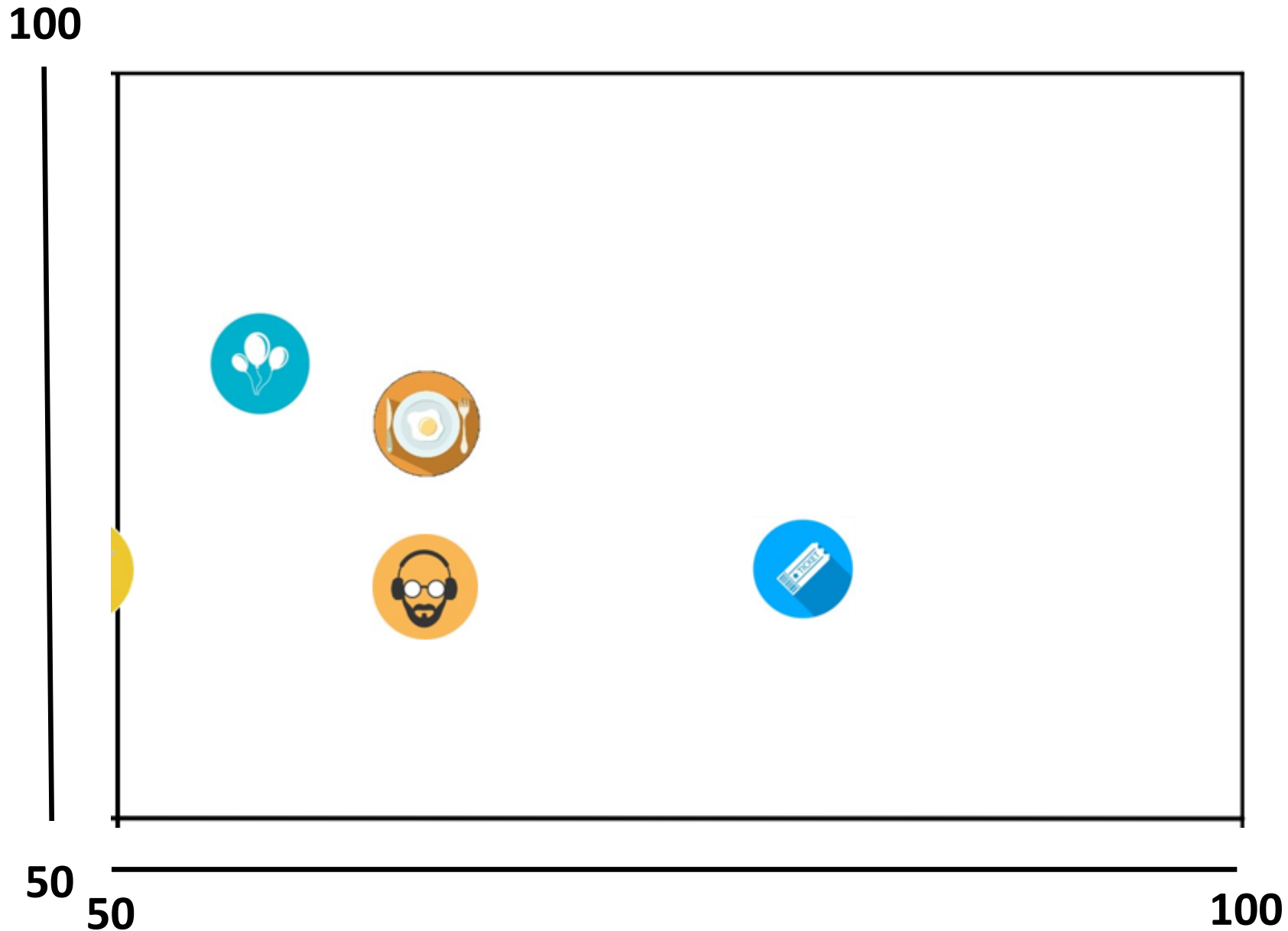





Key Activities: High Interest/Low Risk



Grocery/Pharmacy	
Doctor/Dentist	
Beach/Public park	
Haircut/Salon	

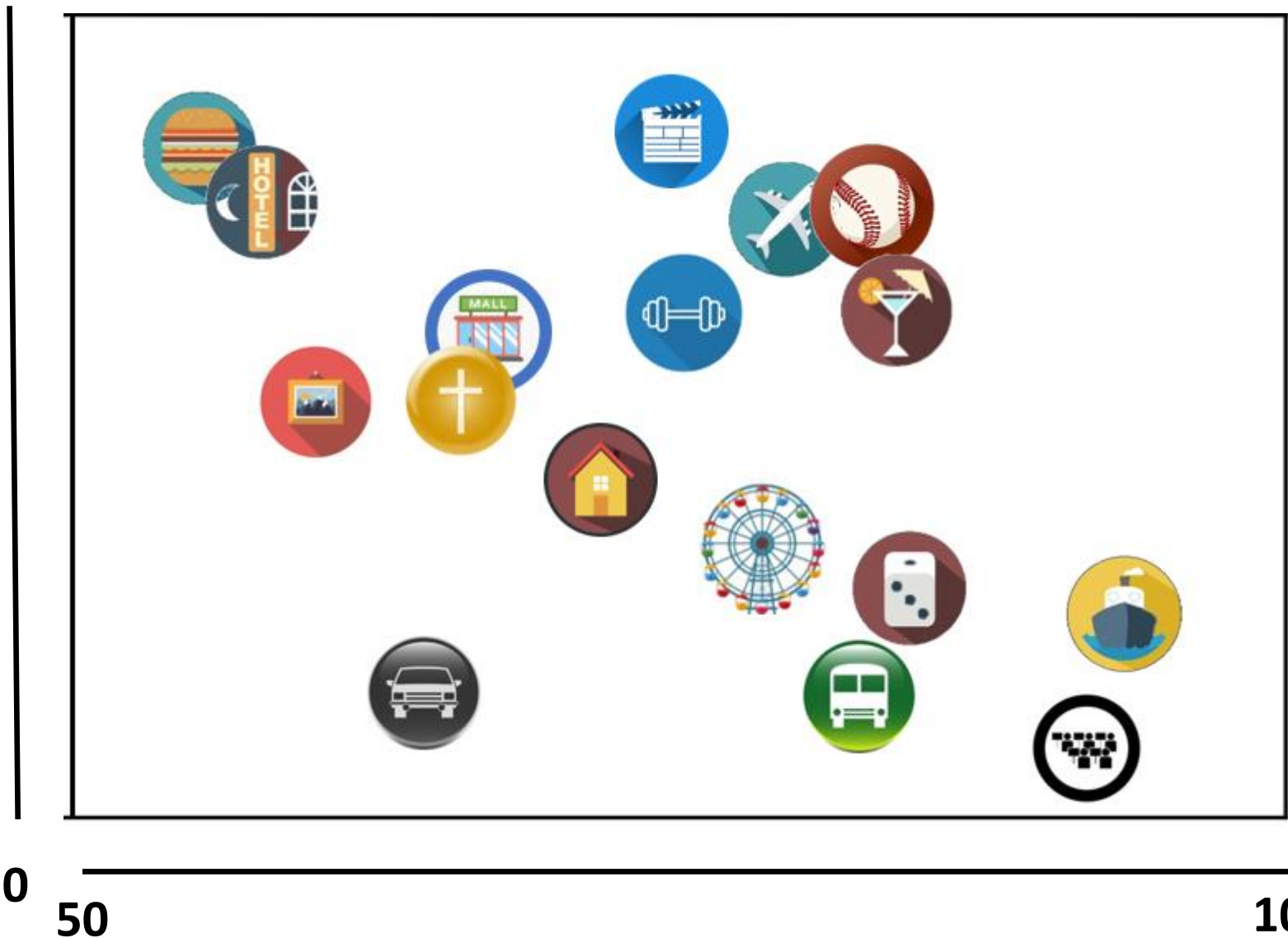
Key Activities: High Interest/High Risk




















Party/Family event	
Sit-Down restaurant	
Radio station event	
Concert/Theater	

Key Activities: Low Interest/High Risk

50

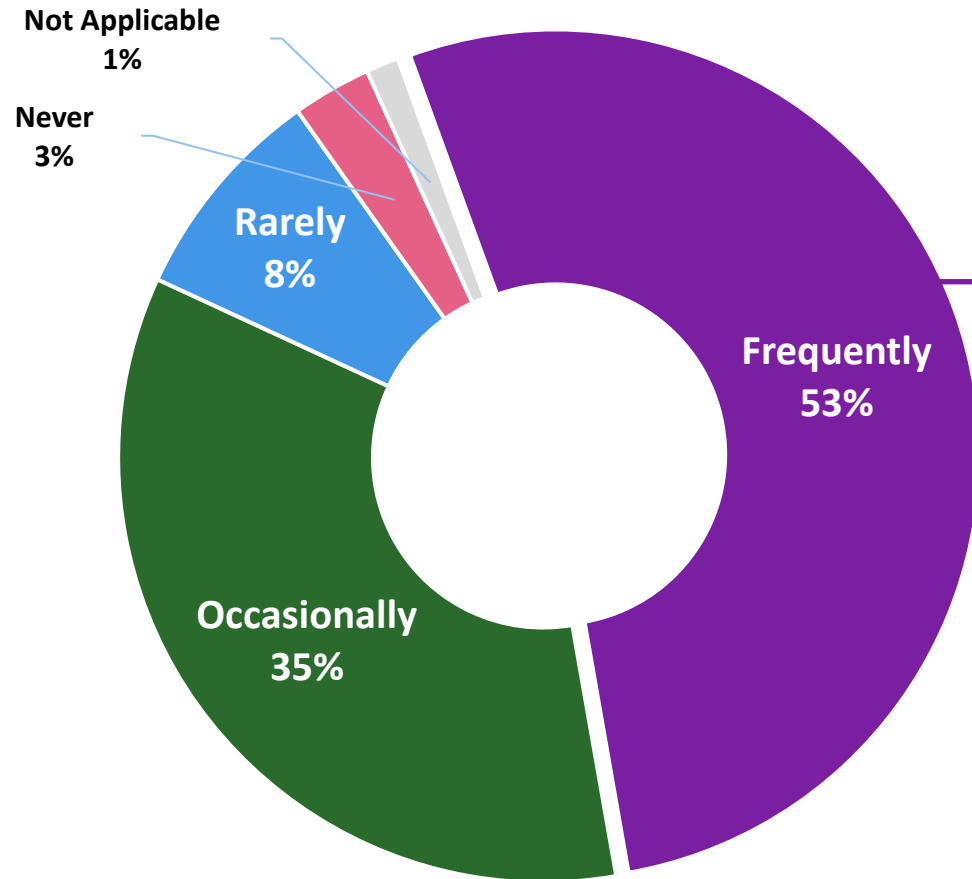


Fast food	
Stay at hotel	
Museum	
Religious service	
Uber/Lyft	
Gym/Exercise class	
Movies	
Mall	
School/Daycare	
Amusement park	
Casino	
Public transportation	
Bar	
Sports event	
Fly	
Cruise	
Political rally	

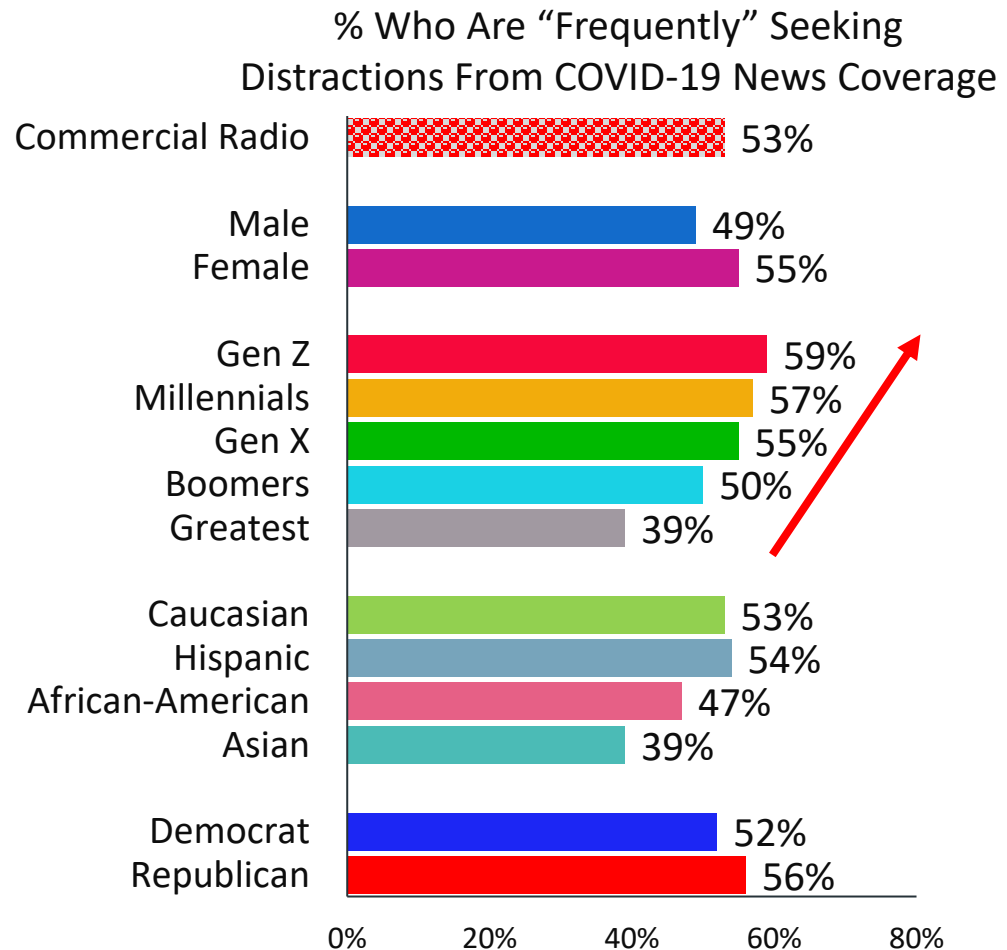


COVID-19 News Coverage

More Than Half Say They Are Frequently Seeking Distractions From COVID-19 News

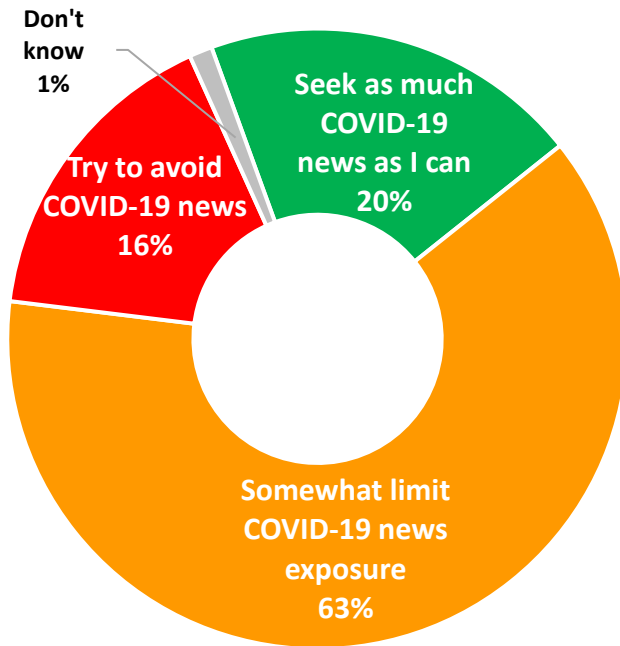


"At this time, how often are you personally seeking distractions from COVID-19 news coverage?"

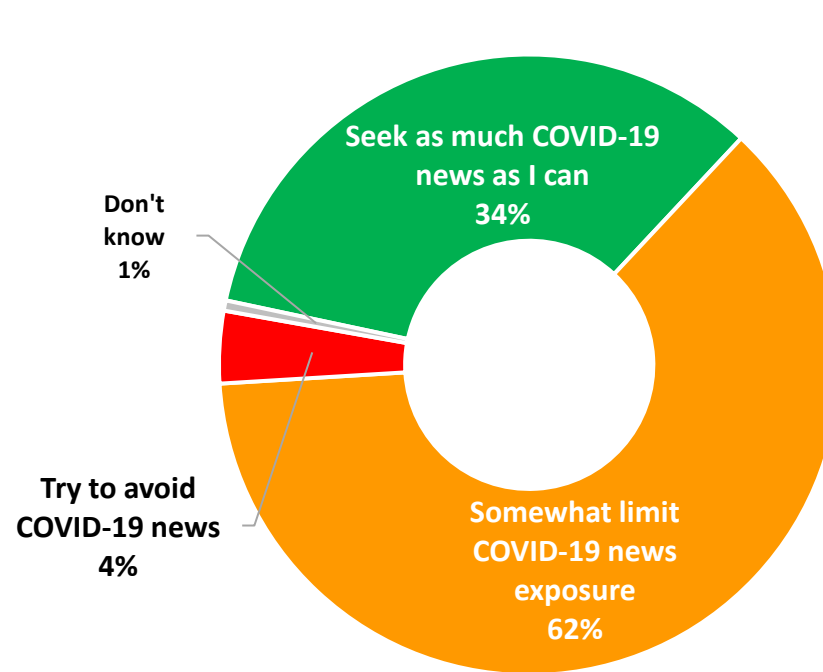


Nearly Eight in Ten Commercial Radio Listeners Try to at Least Somewhat Limit Their COVID-19 News Exposure

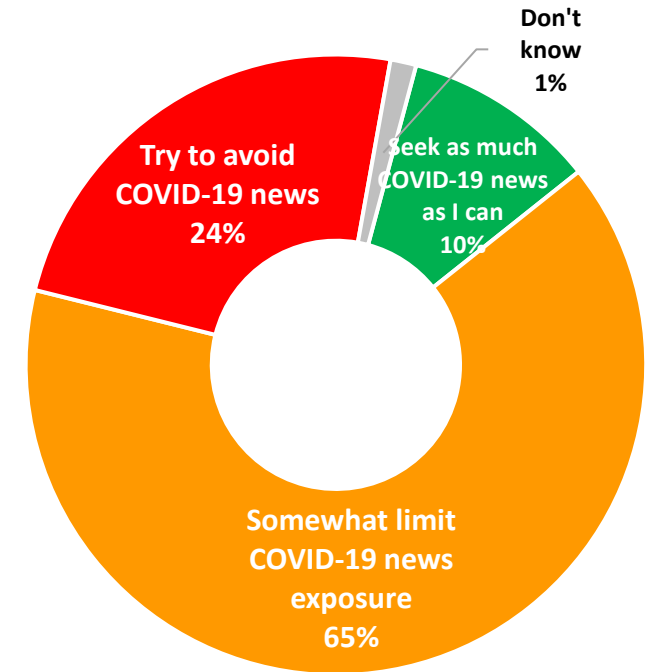
Commercial Radio



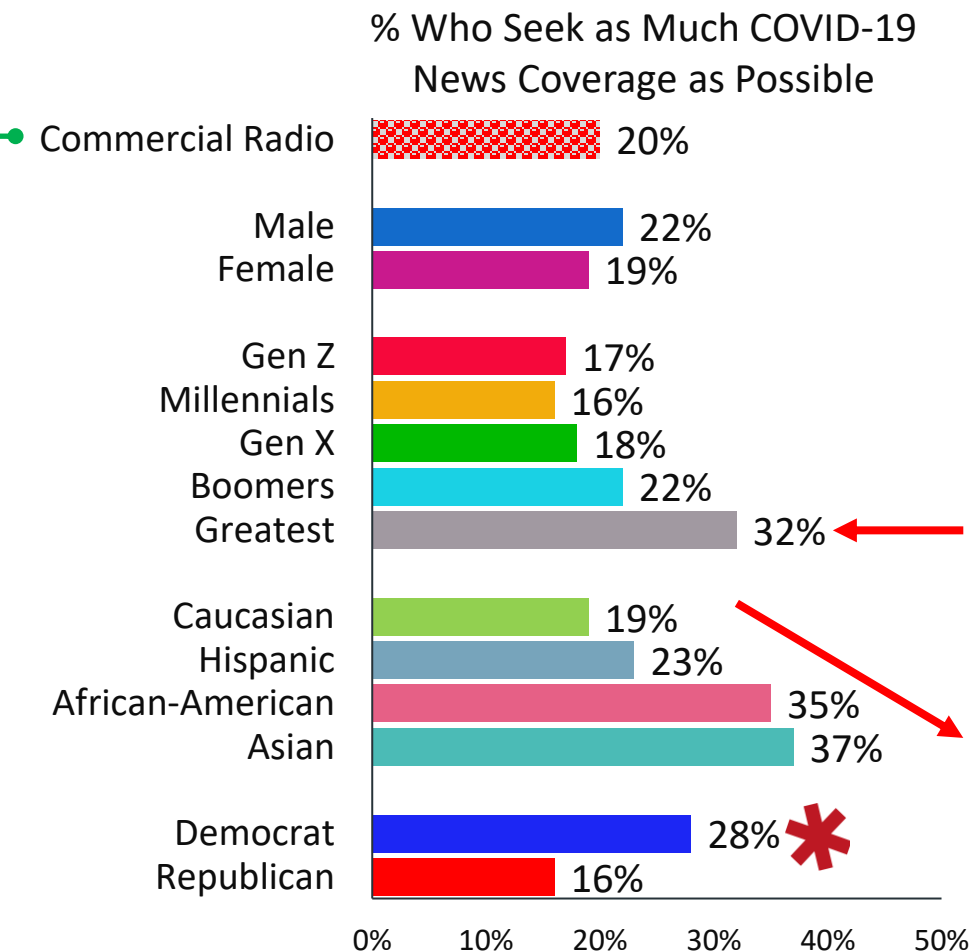
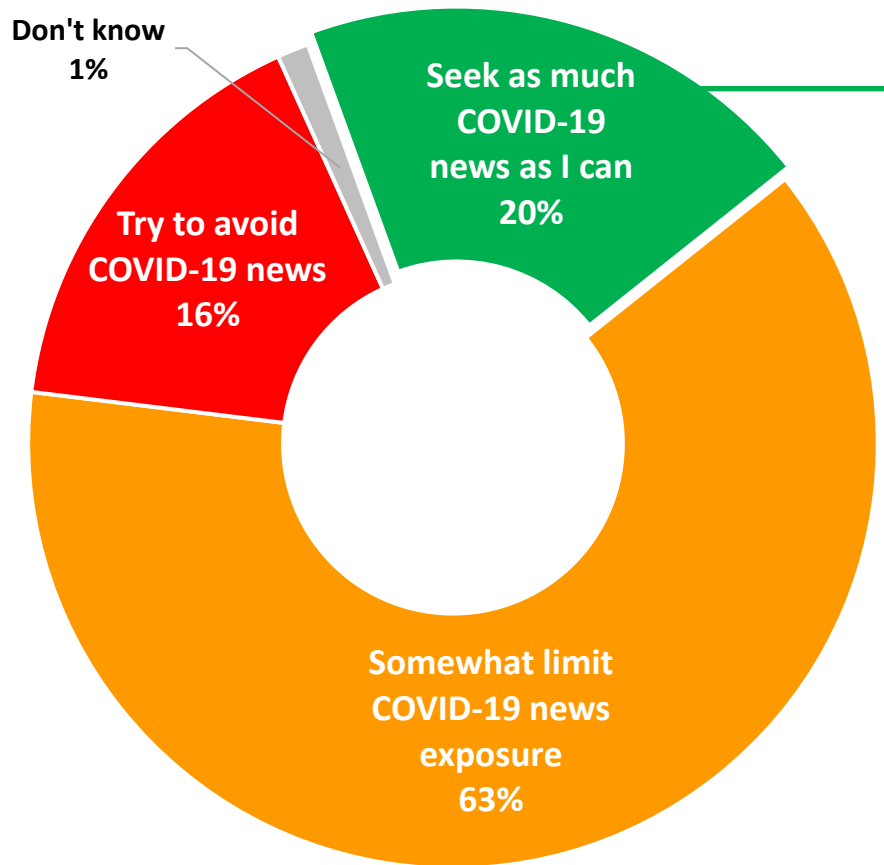
Public Radio



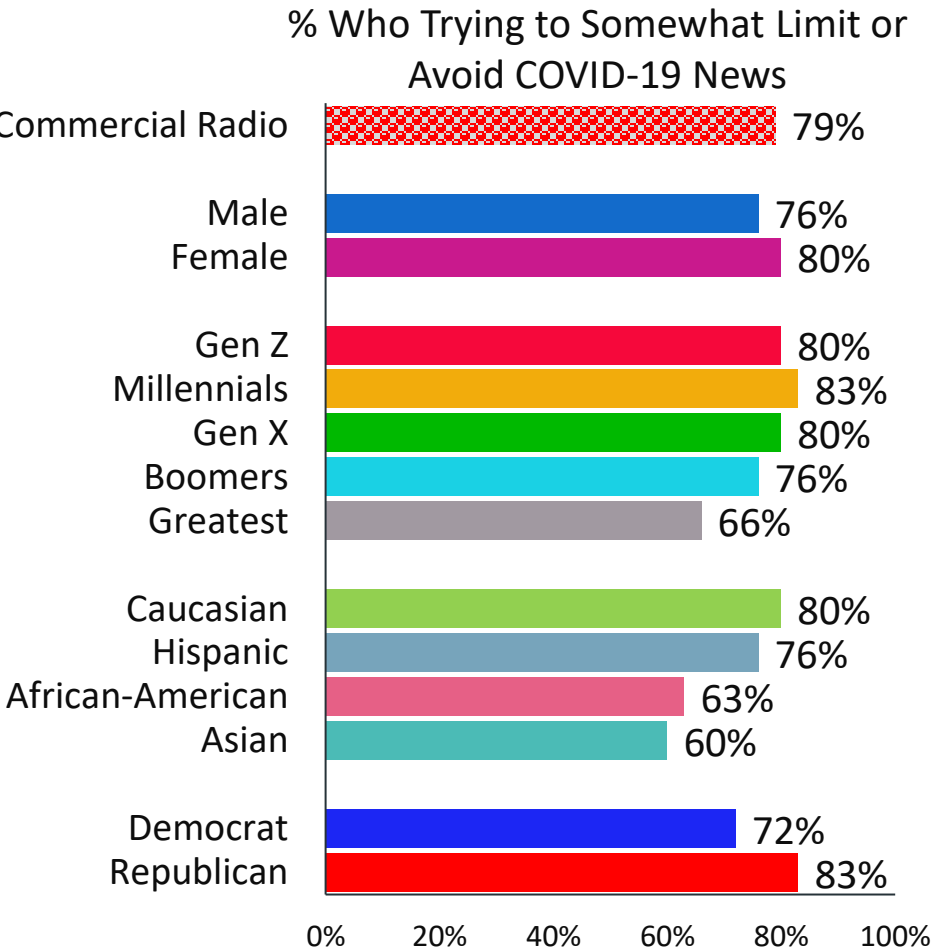
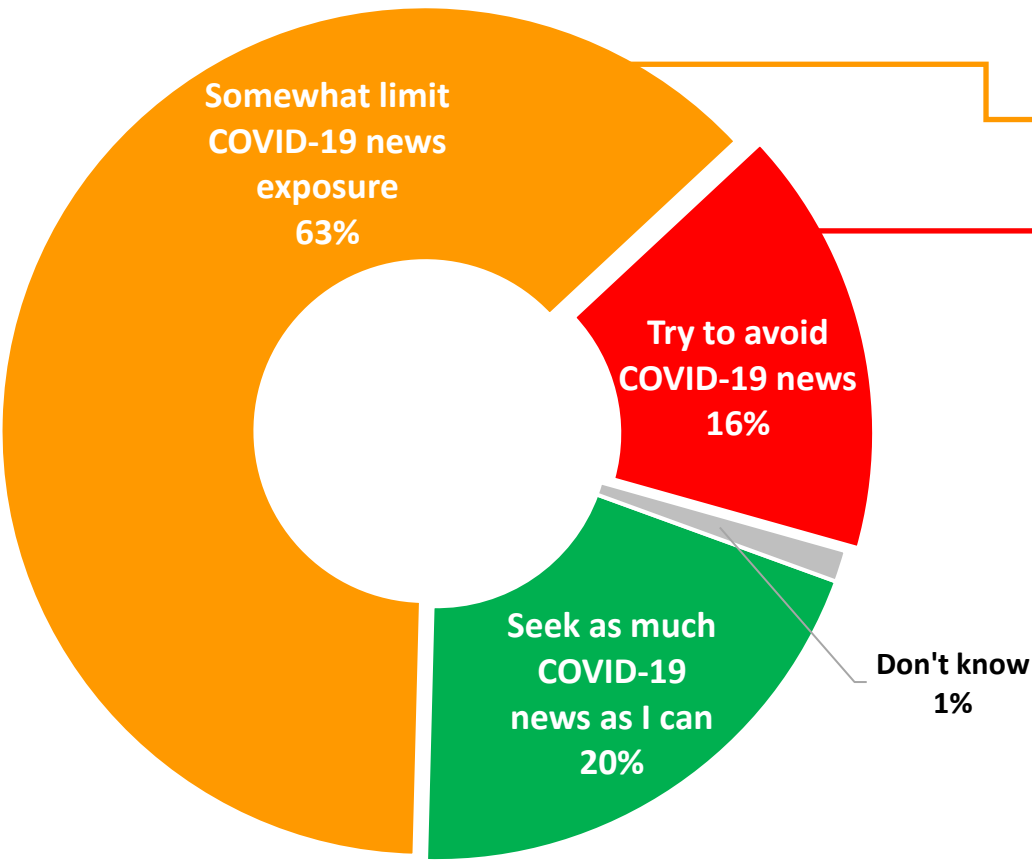
Christian Music Radio



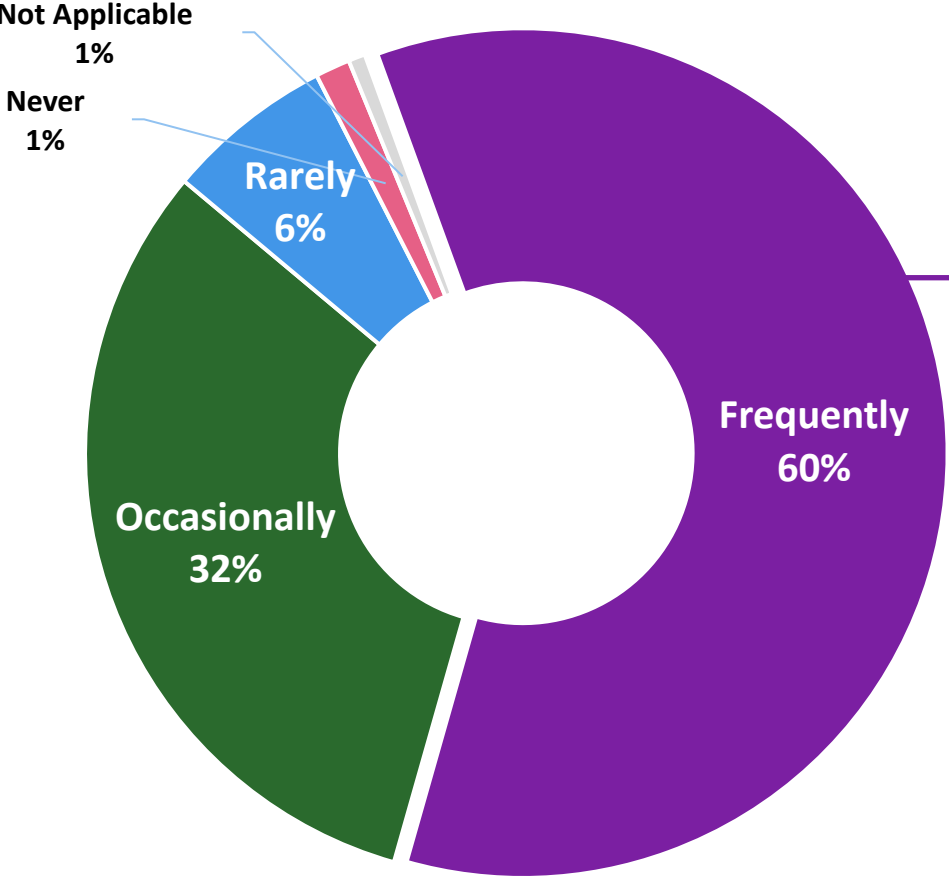
Only One-Fifth Are Seeking as Much COVID-19 News as Possible



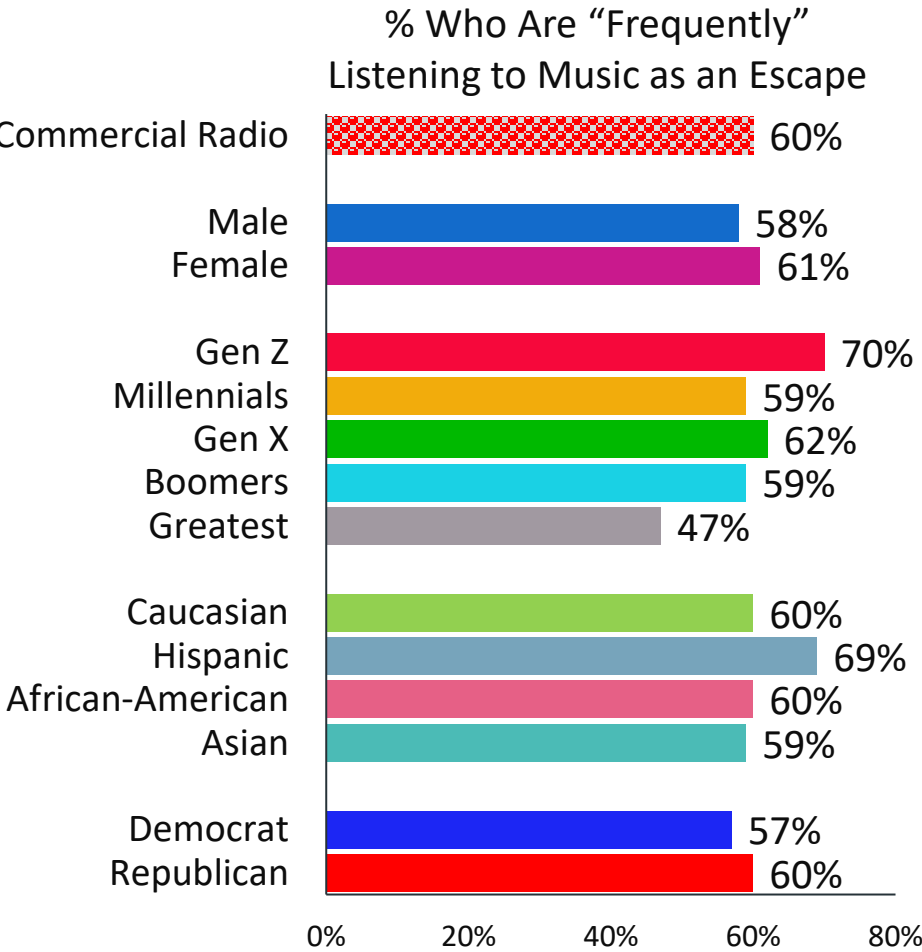
Four in Five Are Trying to Limit or Avoid COVID-19 News

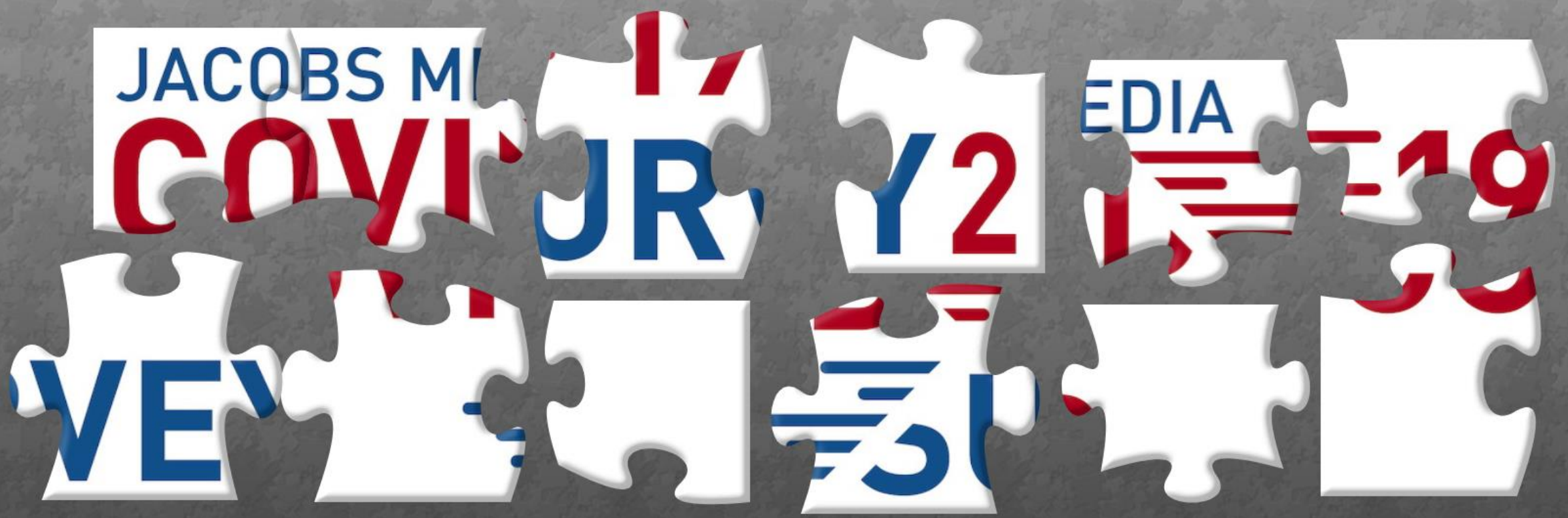


Many Say They Frequently Listen to Music as an Escape



"At this time, how often are you personally listening to music as an escape?"





Takeaways & Action Steps

Key Findings

- Consumers are beginning to cope & accept COVID-19
- It is not perceived to be as big a crisis as it was six weeks ago, but twice as many now know someone who's tested positive for the virus
- COVID-19 has become highly politicized – Dems & Reps are often miles apart
- Many are still at home, but they're beginning to move around, drive, shop
- WFH is an issue today for radio & looks to be a game-changer moving forward
- It's *still* the economy, stupid – the top concern again
- Radio looks healthier in this study – streaming is up across the board
- Trust is down everywhere, but state governors rise to the top of the political heap
- Most are concerned that businesses will open too soon

Key Findings

- An even greater majority are resigned to a “new normal” post-COVID-19; more say the worst is yet to come – especially Democrats & African-Americans
- The vast majority say they often “social distance,” a majority wear face masks
- Few activities are considered “not risky;” The safest are grocery/pharmacy shopping, seeing a doctor/dentist, and going to the beach or a public park
- Once again, favorite radio stations earn “excellent” scores & credit for covering COVID-19 with the right balance; most feel a stronger connection to stations
- Many want distractions (contests, music, humor) over information from radio
- Radio should support first responders/essential workers – just not as much



So Now What?

Strategize WFH Language & Tactics



WFH May Likely Change Your Station



Promote Your Stream & Key Devices – It's Working

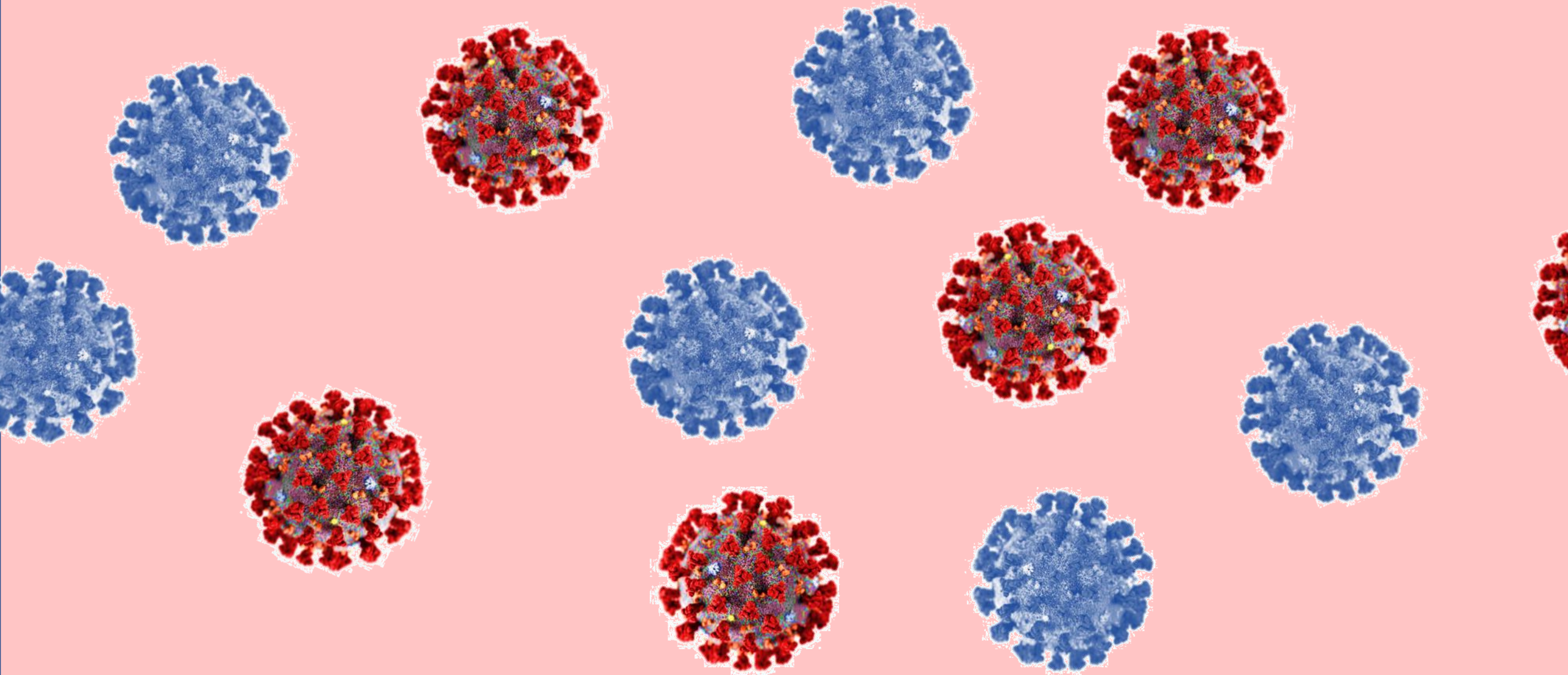


TAP THAT APP

GO MOBILE. DOWNLOAD NOW!



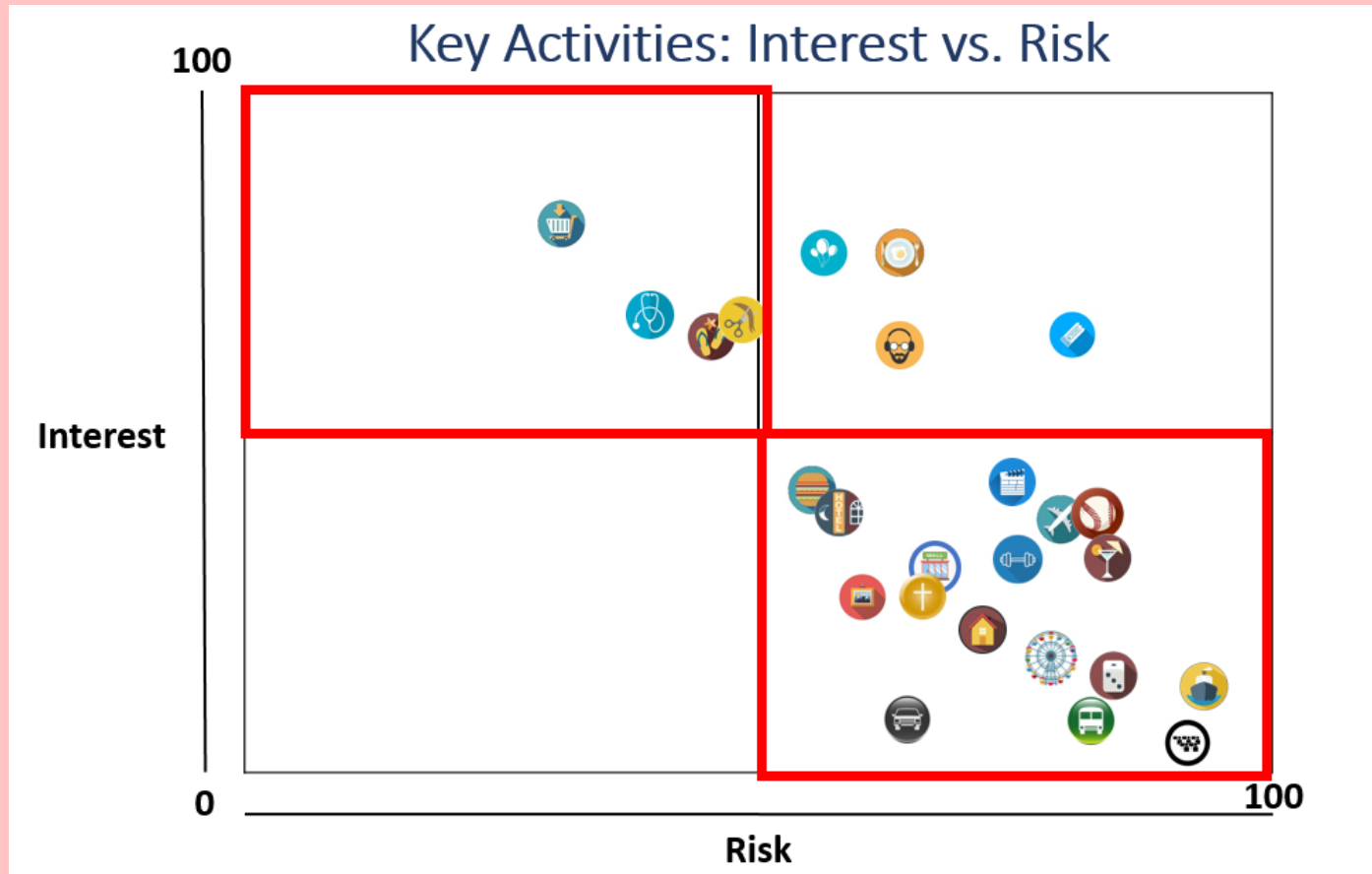
Watch Your Politics



Stay In Your Lane (But We're Still in the Middle of a Pandemic)



Sales Can Help Advertisers – Let the Grid Be Your Guide



Keep Up The Good Work!

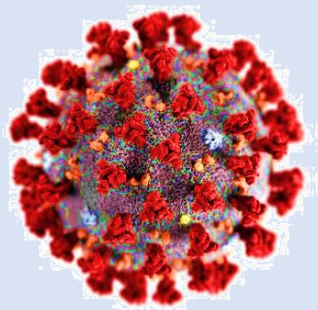


Keep Up The Good Work!



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Radio's Pathway Through the Pandemic

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May 2020