Radio’s 2020 Holiday Road Map

October 2020

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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:
- Male: 41%
- Female: 58%
- Non-Conforming/Prefer Not To Say: 1%

Generation:
- Gen Z (born after 1996): 1%
- Millennials (born between 1981-1996): 14%
- Gen X (born between 1965-1980): 38%
- Baby Boomers (born between 1946-64): 44%
- Greatest Generation (born before 1946): 3%

Race/Ethnicity:
- White: 84%
- Hispanic: 4%
- Black: 3%
- Asian: 2%
- Native American: 1%
- Mixed race: 3%
- Other: 1%
- Prefer not to answer: 3%
Where They Live and How They Vote

**Market Size**
- Top 20: 58%
- 21-50: 18%
- 51+: 24%

**Political Party Preference**
- Republican: 31%
- Democrat: 25%
- Independent: 14%
- None: 15%
- Prefer not to answer: 13%
- Other: 2%
Political Party Preference By Radio Format*

*Excluding independents, other choices, no preference, no answer
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**
- Employed (full-time): 63%
- Employed (part-time): 8%
- Unemployed: 3%
- Self-employed: 6%
- Retired: 16%
- Other: 5%

**Current Employment Status**
- Employed (full-time): 52%
- Employed (reduced salary/hours): 3%
- Employed (part-time): 7%
- Unemployed: 9%
- Self-employed: 5%
- Retired: 17%
- Other: 7%
But Unemployment Numbers Have Improved Since May

Current Employment Status at Time of Survey

May 2020
- Employed (full-time): 49%
- Employed (part-time): 6%
- Employed (reduced salary/hours): 5%
- Unemployed: 15%
- Self-employed: 4%
- Retired: 13%
- Other: 8%

October 2020
- Employed (full-time): 52%
- Employed (part-time): 7%
- Employed (reduced salary/hours): 3%
- Unemployed: 9%
- Self-employed: 5%
- Retired: 17%
- Other: 7%
And Among Those Employed, Nearly Three in Four Are Now Working **Outside** the Home - Up From May

**Among those currently employed**
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

- Total: 37%
- CV2 (May): 22%
- Male: 45%
- Female: 32%
- Gen Z: 33%
- Millennials: 32%
- Gen X: 37%
- Boomers: 39%
- Greatest: 41%
- White: 38%
- Hispanic: 25%
- Black: 16%
- Markets 1-50: 37%
- Markets 51+: 37%
- Democrat: 63%
- Republican: 16%
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?”

<table>
<thead>
<tr>
<th>Perception</th>
<th>Total</th>
<th>CV2 (May)</th>
</tr>
</thead>
<tbody>
<tr>
<td>The worst is behind us</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not sure</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The worst is yet to come</td>
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</tr>
</tbody>
</table>

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

- **Total**: 26% (36%)
- **CV2 (May)**: 26%
- **Male**: 22% (28%)
- **Female**: 28%
- **Gen Z**: 27% (35%)
- **Millennials**: 27%
- **Gen X**: 26%
- **Boomers**: 25%
- **Greatest**: 22%
- **White**: 24% (37%)
- **Hispanic**: 27%
- **Black**: 48% (48%)
- **Markets 1-50**: 26%
- **Markets 51+**: 26%
- **Democrat**: 43% (48%)
- **Republican**: 10% (10%)
“Now that parts of the country have reopened or removed at least some COVID-19 restrictions, which of the following best describes you?”

- Mostly/fully safe; many/all pre-COVID activities (26%)
- Cautious: some pre-COVID activities (41%)
- Very Cautious: few/none pre-COVID activities (31%)
- Don't Know (1%)

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

- Total: 68%
- Male: 72%
- Female: 64%
- Gen Z: 65%
- Millennials: 69%
- Gen X: 70%
- Boomers: 66%
- Greatest: 63%
- White: 69%
- Hispanic: 57%
- Black: 45%
- Markets 1-50: 67%
- Markets 51+: 70%
- Democrat: 49%
- Republican: 85%
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

- Regular radio in the car: 53%
- Regular radio at home: 28%
- Regular radio while working outside your home: 20%
- Stream on the station website (computer/laptop, smartphone, tablet, etc.): 20%
- Stream on the station’s own mobile app: 16%
- Stream via an app that has many stations (iHeartRadio, Radio.com, etc.): 13%
- Stream on a voice-command smart speaker: 11%
- Wireless audio system (Sonos, Bose, etc.): 9%
- Podcast produced by THE STATION THAT SENT YOU THIS SURVEY: 7%
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

- Regular radio in the car: 47% (Total), 53% (CV2)
- Regular radio at home: 28% (Total), 27% (CV2)
- Stream on the station’s own mobile app: 16% (Total), 21% (CV2)
- Stream via an app that has many stations (iHeartRadio, Radio.com, etc.): 13% (Total), 13% (CV2)
- Stream on a voice-command smart speaker: 11% (Total), 14% (CV2)
- Wireless audio system (Sonos, Bose, etc.): 9% (Total), 12% (CV2)
- Stream on the station website (computer/laptop, smartphone, tablet, etc.): 20% (Total), 24% (CV2)
- Regular radio while working outside your home: 20% (Total), 20% (CV2)
- Regular radio at home: 20% (Total), 20% (CV2)
- Podcast produced by THE STATION THAT SENT YOU THIS SURVEY: 7% (Total), 9% (CV2)

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

Podcast produced by THE STATION THAT SENT YOU THIS SURVEY
The 2020 Holiday Season
Many Are Planning on Smaller Holiday Gatherings This Season, Particularly Hispanics, Blacks, and Democrats

“My family/I will be having smaller holiday celebrations/get-togethers than usual”
One-Third Expect Some Virtual Holiday Gatherings This Season, Particularly Blacks and Democrats

“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”
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)

- By car: 61%
- Haven't decided yet: 28%
- By airplane: 22%
- Other: 4%

Planning personal travel during holidays: 45%
No personal travel plans during holidays: 55%
Retail Stores, Health and Services
Facemask Requirements for Shoppers and Employees Are Most Important For In-Store Shopping

- Requires facemasks for all shoppers and employees: 55%
- Hand sanitizer at the door and/or throughout the store: 43%
- Social distancing guidelines are well-marked throughout the store: 41%
- Offers online shopping: 37%
- Limits the number of people allowed in the store: 33%
- Option for curbside pickup: 22%
- Home delivery: 21%
- You must first make an appointment to shop in the store: 3%
More Women Than Men Find In-Store Safety Rules and Procedures to Be Very Important

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

- Requires facemasks for all shoppers and employees: 60% (Men), 48% (Women)
- Hand sanitizer at the door and/or throughout the store: 50% (Men), 50% (Women)
- Social distancing guidelines are well-marked throughout the store: 46% (Men), 34% (Women)
- Offers online shopping: 42% (Men), 30% (Women)
- Limits the number of people allowed in the store: 39% (Men), 24% (Women)
- Option for curbside pickup: 26% (Men), 16% (Women)
- Home delivery: 24% (Men), 16% (Women)
- You must first make an appointment to shop in the store: 4% (Men), 2% (Women)
Seven in Ten Are Either Planning or Currently on a Diet/Fitness/Exercise Plan

Among Those Planning or Currently on a Diet/Fitness/Exercise Plan, When They Plan to Get Serious About It

- I’m dieting/exercising now: 71%
- Prior to the new year: 16%
- After the new year: 13%

Currently or planning dieting/exercising: 70%
No plans for diet/fitness/exercise plan: 30%
Holiday Shopping
“Compared to 2019, how much do you plan to spend this holiday season (gifts, entertaining, food, etc.)?”

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

% Who Plan to Spend the Same Amount or More This Holiday Season, Compared to 2019

- Total: 48%
- Male: 55%
- Female: 42%
- Gen Z: 33%
- Millennials: 44%
- Gen X: 45%
- Boomers: 51%
- Greatest: 59%
- White: 35%
- Hispanic: 26%
- Black: 49%
- Markets 1-50: 47%
- Markets 51+: 50%
- Democrat: 38%
- Republican: 59%

Spend MORE this holiday season: 3%
Spend LESS this holiday season: 42%
Same Amount: 44%
Unsure/undecided: 10%
Two in Three Expect Say They’ll Do at Least Half Their Holiday Shopping Online, Especially Millennials and Gen Xers

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

- None: 4%
- Unsure/undecided: 11%
- Just a bit: 11%
- Less than half: 8%
- Half: 24%
- Most: 38%
- All: 5%

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

- Total: 67%
- Male: 65%
- Female: 69%
- Gen Z: 66%
- Millennials: 76%
- Gen X: 71%
- Boomers: 62%
- Greatest: 53%
- White: 68%
- Hispanic: 70%
- Black: 69%
- Markets 1-50: 69%
- Markets 51+: 62%
- Democrat: 74%
- Republican: 65%
Health and Safety Issues Lead the List of Holiday Concerns

% Who Say Each Is a “Major Concern” This Holiday Season

- Dealing with others who don’t take the coronavirus seriously: 55%
- My health and safety while shopping at stores in-person: 50%
- Not being able to be with certain friends or family members: 49%
- Being too close to others while shopping: 42%
- Experiencing the true joy of the holidays: 41%
- Delivery issues for online purchases (speed, reliability, etc.): 35%
- Trying on clothes in a store: 26%
- Buying items online that I can’t touch/try on: 24%

Health and Safety Issues lead the list of holiday concerns.
Women Are More Concerned Than Men About Everything

% Who Say Each Is a “Major Concern” This Holiday Season

- Dealing with others who don’t take the coronavirus seriously: 48% (Men), 60% (Women)
- My health and safety while shopping at stores in-person: 43% (Men), 55% (Women)
- Not being able to be with certain friends or family members: 42% (Men), 54% (Women)
- Being too close to others while shopping: 34% (Men), 47% (Women)
- Experiencing the true joy of the holidays: 35% (Men), 45% (Women)
- Delivery issues for online purchases (speed, reliability, etc.): 30% (Men), 39% (Women)
- Trying on clothes in a store: 19% (Men), 30% (Women)
- Buying items online that I can’t touch/try on: 19% (Men), 27% (Women)

Men
Women

Women Are More Concerned Than Men About Everything

- Everything
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)?”
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

- After the holidays: 9%
- Last minute: 19%
- Early-mid December: 29%
- Black Friday/Thanksgiving Weekend: 12%
- Pre-Thanksgiving: 9%
- Already started shopping: 7%

While much spending this holiday season will take place in December, many will start shopping earlier.
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

<table>
<thead>
<tr>
<th>Time Period</th>
<th>Men</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>Already started shopping</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>Pre-Thanksgiving</td>
<td>8%</td>
<td>10%</td>
</tr>
<tr>
<td>Black Friday/Thanksgiving Weekend</td>
<td>10%</td>
<td>13%</td>
</tr>
<tr>
<td>Cyber Monday, incl. week after Thanksgiving</td>
<td>14%</td>
<td>16%</td>
</tr>
<tr>
<td>Early-mid December</td>
<td>31%</td>
<td>27%</td>
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<tr>
<td>Last minute</td>
<td>21%</td>
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</tr>
<tr>
<td>After the holidays</td>
<td>9%</td>
<td>8%</td>
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</tbody>
</table>
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

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

- **Clothing**: Women (66%) > Men (72%)
- **Gift cards**: Women (62%) > Men (69%)
- **Beer/Wine/Liquor/Spirits**: Women (45%) > Men (49%)
- **Dining (take out or in-person dining)**: Women (47%) > Men (45%)
- **Toys**: Women (41%) > Men (45%)
- **Cards/gifts/novelties**: Women (38%) > Men (46%)
- **Technology/Electronics (smartphones, TVs, etc )**: Women (34%) > Men (50%)
- **Home improvement/holiday décor**: Women (33%) = Men (34%)
- **Cosmetics/personal care**: Women (37%) > Men (18%)
At Lower Levels, Women Plan to Spend More On Pet(s), While Men Say They’ll Buy Health, Fitness, Sporting Goods

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

- **Software/video games**: 29% (Men), 28% (Women)
- **Pets**: 21% (Men), 30% (Women)
- **Health/fitness/sporting goods**: 25% (Men), 20% (Women)
- **Jewelry**: 19% (Men), 22% (Women)
- **Entertainment (tickets)**: 17% (Men), 16% (Women)
- **Travel**: 14% (Men), 11% (Women)
- **Florist/flowers**: 9% (Men), 8% (Women)
- **Furniture**: 7% (Men), 7% (Women)
- **Car purchase/lease**: 3% (Men), 2% (Women)
“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:

- Plan to spend SAME AMOUNT: 73%
- Plan to spend MORE: 10%
- Plan to spend LESS: 6%
- Don't plan to spend on non-essentials: 9%
- No pet last year: 3%
- No pet: 32%
- Have a pet: 68%
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?”

Never 37%
Rarely 32%
Some years 18%
Every year 13%

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

No way 61%
Don’t know/not sure 16%
Maybe 18%
Definitely 5%
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

- Total: 23%
- Male: 24%
- Female: 23%
- Gen Z: 32%
- Millennials: 28%
- Gen X: 26%
- Boomers: 20%
- Greatest: 15%
- White: 23%
- Hispanic: 20%
- Black: 23%
- Markets 1-50: 22%
- Markets 51+: 28%
- Democrat: 15%
- Republican: 32%
Rhythmic Urban and Country Fans Are Most Likely to Say They Definitely Will/Might Shop in Stores on Black Friday

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

- Every year: 22%
- Some years: 37%
- Rarely: 26%
- Never: 15%

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

- Definitely: 25%
- Maybe: 49%
- Don’t know/not sure: 16%
- No way: 9%
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)

- Total: 75%
- Male: 74%
- Female: 76%
- Gen Z: 78%
- Millennials: 81%
- Gen X: 80%
- Boomers: 70%
- Greatest: 51%
- White: 75%
- Hispanic: 75%
- Black: 74%
- Markets 1-50: 76%
- Markets 51+: 72%
- Democrat: 78%
- Republican: 76%

> Don’t know/not sure 16%
> Definitely 25%
> Maybe 49%
> No way 9%
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”

- Recommendations from friends/family/colleagues: 92%
- User reviews online: 82%
- AM/FM radio commercials: 65%
- TV commercials: 64%
- Online advertising (website ads, video ads in online streams, etc.): 63%
- Catalogs: 62%
- An ad you received in the mail: 58%
- Recommendation from a favorite DJ/radio personality: 57%
- Email advertising: 56%
- Seeing it on social media (Facebook ads, Instagram, etc.): 53%
- Newspaper ad: 40%
- Mobile ads/text messaging: 31%
Radio’s Influence on Purchase Decisions

**Radio Commercials**

- **A lot** 7%
- **A little** 58%
- **Not at all** 32%
- **Don't know** 2%

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

**Personality Live Reads**

- **A lot** 9%
- **A little** 49%
- **Not at all** 40%
- **Don't know** 3%

“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

AM/FM Radio Commercials

<table>
<thead>
<tr>
<th>Generation</th>
<th>Total</th>
<th>Gen Z</th>
<th>Millennials</th>
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</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>65%</td>
<td>50%</td>
<td>59%</td>
<td>66%</td>
<td>67%</td>
<td>61%</td>
</tr>
</tbody>
</table>

Recommendation From a Favorite DJ/Radio Personality

<table>
<thead>
<tr>
<th>Generation</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>57%</td>
<td>59%</td>
<td>59%</td>
<td>60%</td>
<td>55%</td>
<td>45%</td>
</tr>
</tbody>
</table>

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

- Least than half: 16%
- Half: 25%
- Most: 15%
- All: 2%
- Unsure/undecided: 21%
- None: 3%

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

- Least than half: 14%
- Half: 31%
- Most: 23%
- All: 7%
- Unsure/undecided: 12%
- None: 2%

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

- Least than half: 15%
- Half: 31%
- Most: 22%
- All: 6%
- Unsure/undecided: 12%
- None: 2%
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
Contact Us

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