
HOW RADIO ENDURES THROUGH COVID-19

WHAT HAPPENS TO RADIO WHEN PEOPLE ARE NO LONGER IN THEIR CARS?

HOW HAVE RADIO LISTENER SPENDING HABITS SHIFTED DURING “SHELTER IN PLACE”?

WHAT WILL THE REBOUND LOOK LIKE?

"I AM STILL FINDING WAYS TO LISTEN TO RADIO, EVEN THOUGH I AM NOT COMMUTING OR WORKING OUTSIDE THE HOME"

44% of Adults 18+ agree with this statement

(Source: Nielsen custom survey March 20-22 A18+, n-1000 – R.A.B Presentation 4.6.20 *People Tune in During Difficult times*)

- CONSUMERS ARE SPENDING A SIGNIFICANT AMOUNT OF TIME LISTENING TO RADIO DIGITALLY. SHARE BY PLATFORM INCLUDES: (SOURCE: TRITON AM/FM STREAMING TRENDS, APRIL 2020)
 - 46%, MOBILE APP
 - 31%, DESKTOP/LAPTOP/OTHER
 - 23%, SMART SPEAKER
- IN-HOME LISTENING IS ON THE RISE. AS AMERICANS SPEND MORE TIME AT HOME, AM/FM RADIO TIME SPENT IS STEADILY INCREASING MONDAY-FRIDAY, 6AM-7PM. DURING THE LAST WEEK OF MARCH, AMERICANS SPENT **58 MINUTES A DAY** LISTENING TO RADIO AT HOME, COMPARED TO 45 MINUTES A DAY IN THE FIRST WEEK OF MARCH, **29% GAIN**. (SOURCE: NIELSEN MARCH 2020 PPM/45 MARKET TOTAL/M-F 6AM-7PM/PERSONS 18+/DAILY TSL BY LOCATION IN MINUTES)
- AM/FM RADIO BROADCAST STREAMS ARE EXPERIENCING A SIGNIFICANT JUMP IN LISTENING. **145 INDEX** WEEK OF MARCH 19 VS. WEEK ONE OF MARCH (WEEK OF FEB. 27). (SOURCE: NIELSEN UNEMBEDDED PPM MARKETS (45)/PERSONS 18+/MON-FRI 6A-7P/PRE-TLR ENCODED STREAMS)

RADIO MATTERS, REGARDLESS OF WORK STATUS



86% of those still
going to work
outside of the home
are listening the
same or more



79% of those
working from
home are listening
the same or more



75% of those at
home, no longer
working a regular
job, are listening the
same or more

"CONSUMER MINDSETS HAVE SHIFTED. WHAT WAS ONCE IMPORTANT TO CONSUMERS, MAY HAVE CHANGED."

(RAB: business unusual – 10 reasons to advertise during difficult times.
<https://www.Rab.Com/secure/unusual/pdf/10reasonstoadvertiseportrait.Pdf>)

- IN THE FIRST WEEK OF SIGNIFICANT BUSINESS CLOSURES AND SELF-QUARANTINES, ADVERTISING GENERATED OVERALL **WEB TRAFFIC INCREASE OF 20%+**. (SOURCE: ANALYTICOWL, COMPARISON OF THE PERIOD OF MARCH 2-8 TO THE PERIOD OF FEBRUARY 24 - MARCH 1)
- RADIO DRIVES RESULTS. ADVERTISERS IN SOME OF RADIO'S TOP CATEGORIES EXPERIENCED SIGNIFICANT INCREASES IN WEB TRAFFIC FROM PRIOR AND MORE IMPORTANTLY, NEW VISITORS. (SOURCE: ANALYTIC OWL, MARCH-APRIL 2020)
 - PEST CONTROL ADVERTISERS ACHIEVED A 60% LIFT IN WEB TRAFFIC MARCH 30-APRIL 19, AS COMPARED TO MARCH 9-29.
 - BEVERAGES ACHIEVED A 43% SURGE IN NEW WEBSITE VISITS.
 - FURNITURE STORES EXPERIENCED AN INCREASE OF 25% IN WEB TRAFFIC.
 - RESTAURANTS ACHIEVED A WEBSITE TRAFFIC LIFT OF 13%
 - PET SUPPLY RETAILERS HAD AN OVERALL LIFT OF 17%.
- DAILY RADIO LISTENERS ARE SHOPPING MORE THAN THE GENERAL POPULATION. (SOURCE: CUSTOM NIELSEN ONLINE SURVEY CONDUCTED MARCH 20-22)
 - SHOPPING FOR GROCERIES, 72% (+3% MORE THAN ADULTS 18+)
 - GAS FOR THE CAR, 53% (+6% MORE THAN ADULTS 18+)
 - TAKE-OUT FOOD FROM A LOCAL RESTAURANT, 43% (+3% MORE THAN ADULTS 18+)
 - SHOPPING FROM PHARMACY/DRUG STORE, 41% (+2% MORE THAN ADULTS 18+)
 - SHOPPING FOR ALCOHOLIC BEVERAGES, 21% (+4% MORE THAN ADULTS 18+)
 - SHOPPING FOR HOME IMPROVEMENT GOODS, 15% (+3% MORE THAN ADULTS 18+)

85% OF U.S. CONSUMERS FEEL THAT THE WAY BRANDS BEHAVE DURING THE COVID-19 WILL IMPACT WHETHER OR NOT THEY WILL DO BUSINESS WITH THOSE COMPANIES IN THE FUTURE.

(Source: gfk coronavirus pulse, May 2020)

- 88% OF CONSUMERS MOST VALUE COST-SAVING PROMOTIONS FROM BRANDS, AND MORE THAN 82% SAID THEY VALUE BRANDS OFFERING DISCOUNTS, DEALS, FREEBIES AND COST-SAVING PROMOTIONS WHILE ENDURING THE STAY-AT-HOME ECONOMY. (SOURCE: INFLUENCE CENTRAL, APRIL 2020)
 - 58% OF CONSUMERS SAID THEY ARE IMPRESSED BY BRANDS THAT ARE PROVIDING NECESSARY SERVICES.
 - 55% SAID THEY VALUE BRANDS THAT HAVE MADE CHANGES TO HELP CONSUMERS, INCLUDING HELPING LOCAL COMMUNITIES.
- SHOPPERS ARE ACUTELY AWARE OF THE IMPACTS THE PANDEMIC IS HAVING ON THEIR LOCAL COMMUNITY, AND ARE LOOKING TO GIVE BACK WHERE POSSIBLE, WITH HALF (49%) OF CONSUMERS INDICATING THEY HAVE MADE A PURCHASE SPECIFICALLY TO SUPPORT A LOCAL SMALL BUSINESS DURING THE PANDEMIC. (SOURCE: NATIONAL RETAIL FEDERATION (NRF) APRIL 15 CONSUMER POLL)

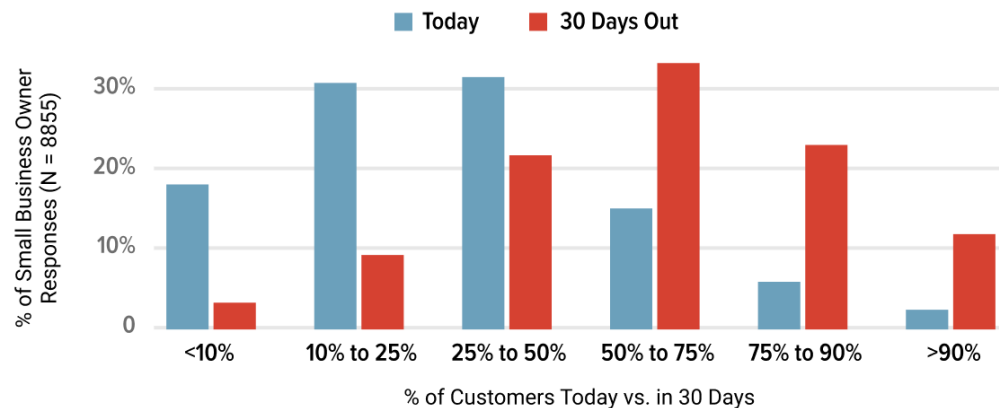
“IF YOU WANT YOUR BUSINESS TO SURVIVE AFTER THE DOWNTURN, YOU MUST ADVERTISE. ANALYSES OF BUSINESSES AND COMPANIES THAT DID NOT ADVERTISE DURING PREVIOUS RECESSIONS REVEALED THAT THEY EXPERIENCED SIGNIFICANT LOSSES POST RECESSION.”

(R.A.B: Business Unusual - 10 reasons to advertise during difficult times)

- 85% OF U.S. CONSUMERS FEEL THAT THE WAY BRANDS BEHAVE DURING THE COVID-19 WILL IMPACT WHETHER OR NOT THEY WILL DO BUSINESS WITH THOSE COMPANIES IN THE FUTURE. (SOURCE: GFK CORONAVIRUS PULSE, MAY 2020)
 - 55% SAID THEY VALUE BRANDS THAT HAVE MADE CHANGES TO HELP CONSUMERS, INCLUDING HELPING LOCAL COMMUNITIES.
 - OVERALL, 42% OF RESPONDENTS BELIEVE THAT THE WAY THEY SHOP WILL FUNDAMENTALLY CHANGE AS A RESULT OF THE COVID-19 OUTBREAK. (SOURCE: EY FUTURE CONSUMER INDEX)
 - 34% OF CONSUMERS INDICATE THAT THEY WOULD PAY MORE FOR LOCAL PRODUCTS
 - 25% WOULD PAY MORE FOR TRUSTED BRANDS
 - 23% WOULD PAY MORE FOR ETHICAL PRODUCTS
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“...GREAT NEWS. SIMPLY PUT: 77% OF BUSINESS OWNERS TODAY SAY THAT THEY’RE AT LESS THAN HALF OF THEIR CUSTOMERS. IN 30 DAYS, THIS SHIFTS DRAMATICALLY THE OTHER WAY: 67% BELIEVE THEY’LL HAVE MORE THAN HALF THEIR CUSTOMERS BACK IN JUNE, AND HALF OF THOSE BELIEVE THEY’LL BE BACK TO THREE-QUARTERS OF THEIR CUSTOMERS.”

What Percent of Customers Will Return in 30 Days?



* Survey conducted in May, 2020

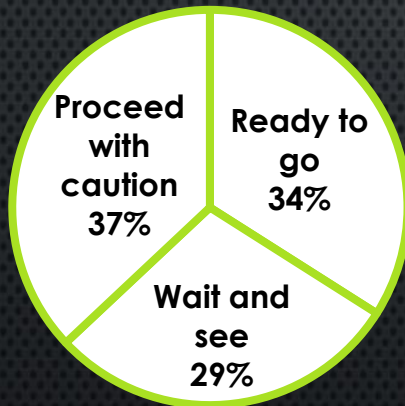
Brought to you by  Alignable . The Small Business Referral Network.

(Was May the Turning Point? Optimism Returns With Reopening - [Eric Groves](#) from [Alignable](#) June 3, 2020.)

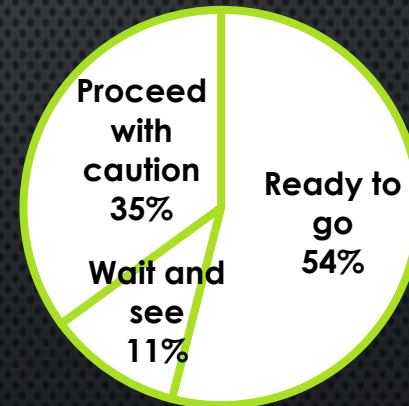
THE REBOUND IS NEAR...

“OVER HALF ARE NOW “READY TO GO” AND FEEL THAT LIFE IS BECOMING MORE NORMAL”

4/30-5/2



5/27-5/29



(Source: Custom Nielsen study conducted 4/30 –5/2 and 5/27 –5/29, via an online survey, based on a weighted sample of 1000, P18+)

PEOPLE WHO ARE READY TO GO ARE HEAVY RADIO LISTENERS

Index vs. Total / heavy listening to AM/FM radio in typical day



(Source: Custom Nielsen study conducted 5/27 –5/29, via an online survey, based on a weighted sample of 1000, P18+)

Those that are Heavy Radio Listeners, are about 10% More Likely to be “Ready to Go”.

SIGNIFICANT GAINS IN CONSUMER SENTIMENT ABOUT EMERGING FROM COVID CRISIS

	4/30-5/2	5/27-5/29
Stores that were closed have started to open again	40%	76%
People are starting to resume more normal activities	44%	74%
I'll resume some normal activities in the next month	63%	72%
My city/town is starting to emerge out of the crisis	42%	71%
It is safer than it was a month ago	38%	50%
I'll resume most normal activities in the next month	42%	48%
In public, things feel more normal than before crisis	25%	42%
I am becoming less concerned about virus risks	34%	40%

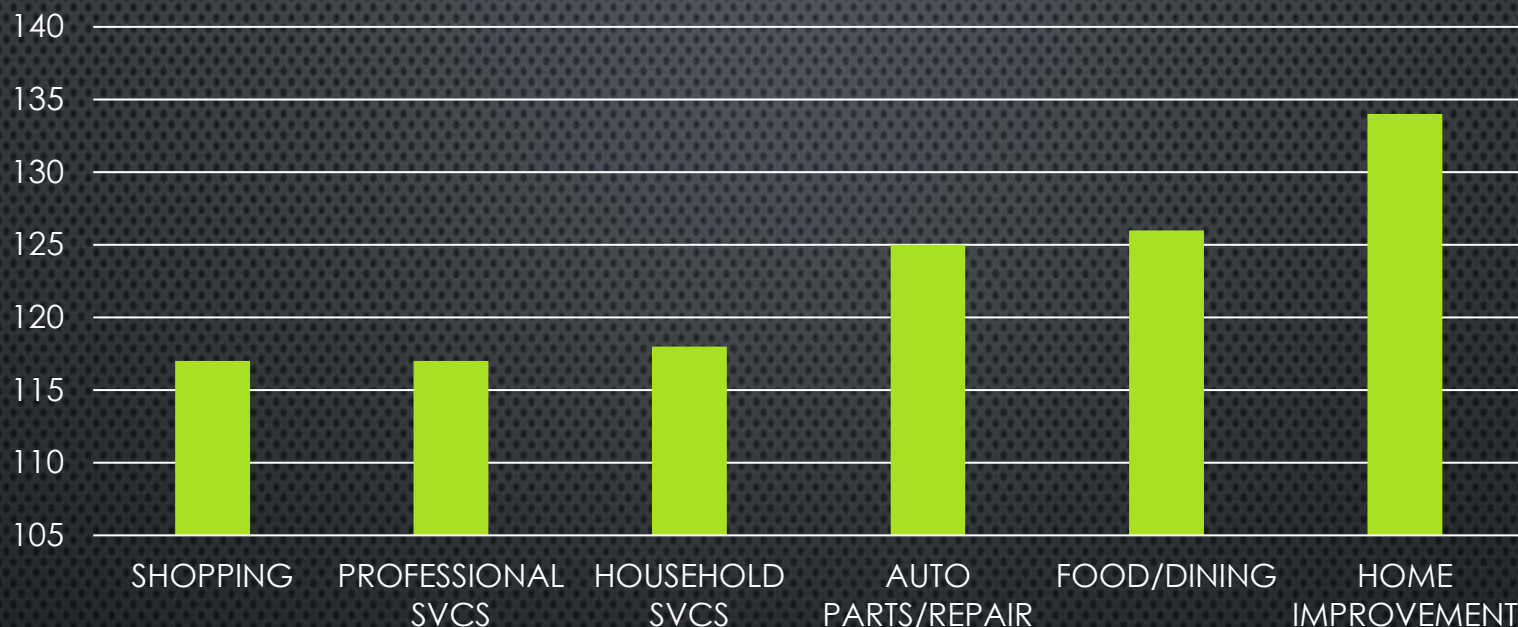
(Source: Custom Nielsen study conducted 4/30 –5/2 and 5/27 –5/29, via an online survey, based on a weighted sample of 1000, P18+)

RADIO IS RIGHT FOR VIRTUALLY ANY CATEGORY OF BUSINESS.

- BASED ON THE NIELSEN DATA ABOVE, CATEGORIES WHERE RADIO LISTENERS ARE LIKELY TO SPEND WITHIN TWO WEEKS OF COVID-19-RELATED RESTRICTIONS BEING RELIEVED INCLUDE: (SOURCE: CUSTOM NIELSEN STUDY, APRIL 30-MAY 2, ONLINE SURVEY, A18+)
 - RESTAURANTS
 - CLOTHING STORES/DEPARTMENT STORES
 - SALONS
 - COFFEE SHOPS/CAFES
 - HOME IMPROVEMENT
 - AUTOMOTIVE AFTERCARE/REPAIR
- MAJOR PURCHASES ARE ON THE HORIZON FOR CONSUMERS OVER THE NEXT 2 YEARS. BRANDS IN THE MAJOR PURCHASE CATEGORY (E.G. APPLIANCES, AUTOMOBILES, REAL ESTATE, ETC.) SHOULD BEGIN ADVERTISING NOW AS CONSUMERS BEGIN TO RESEARCH THEIR OPTIONS TO BUY. (SOURCE: CUSTOM NIELSEN STUDY, APRIL 30-MAY 2, ONLINE SURVEY, A18+)
 - REAL ESTATE
 - AUTOMOTIVE
 - TRAVEL
 - HEALTH/FITNESS

PEOPLE WHO ARE "READY TO GO" ARE READY TO SPEND

Index vs. Total / plan to spend within A month following easing of COVID 19 restrictions



People who are Ready to Go radio listeners are **25% More Likely** to spend on **Auto Parts/Repair**. They are **26% More Likely** to spend on **Food/Dining** and **34% More Likely** to spend on **Home Improvement** projects.

Heavy Radio Listeners are **122% More Likely** to spend more money within 2 months after restrictions are eased, on **Plumbing/HVAC**.

(Source: Custom Nielsen study conducted 5/27 –5/29, via an online survey, based on a weighted sample of 1000, P18+)

HIGHLIGHTS/SUMMARY

- RADIO'S PRIMARY LISTENER BASE HAS SHIFTED TO "OTHER WAYS TO LISTEN"; KEEPING NUMBERS STEADY THROUGH THE CRISIS
- CONSUMER HABITS HAVE CHANGES AND THEIR CONFIDENCE IN LOCAL BRANDS HAS RISEN, IN ADDITION TO A HIGH AWARENESS OF HOW MUCH MONEY THEY ARE SPENDING.
- HEAVY RADIO LISTENERS WILL REBOUND THE LOCAL ECONOMIES WITH THEIR MAJOR PURCHASES IN THE COMING MONTHS AND YEARS.

