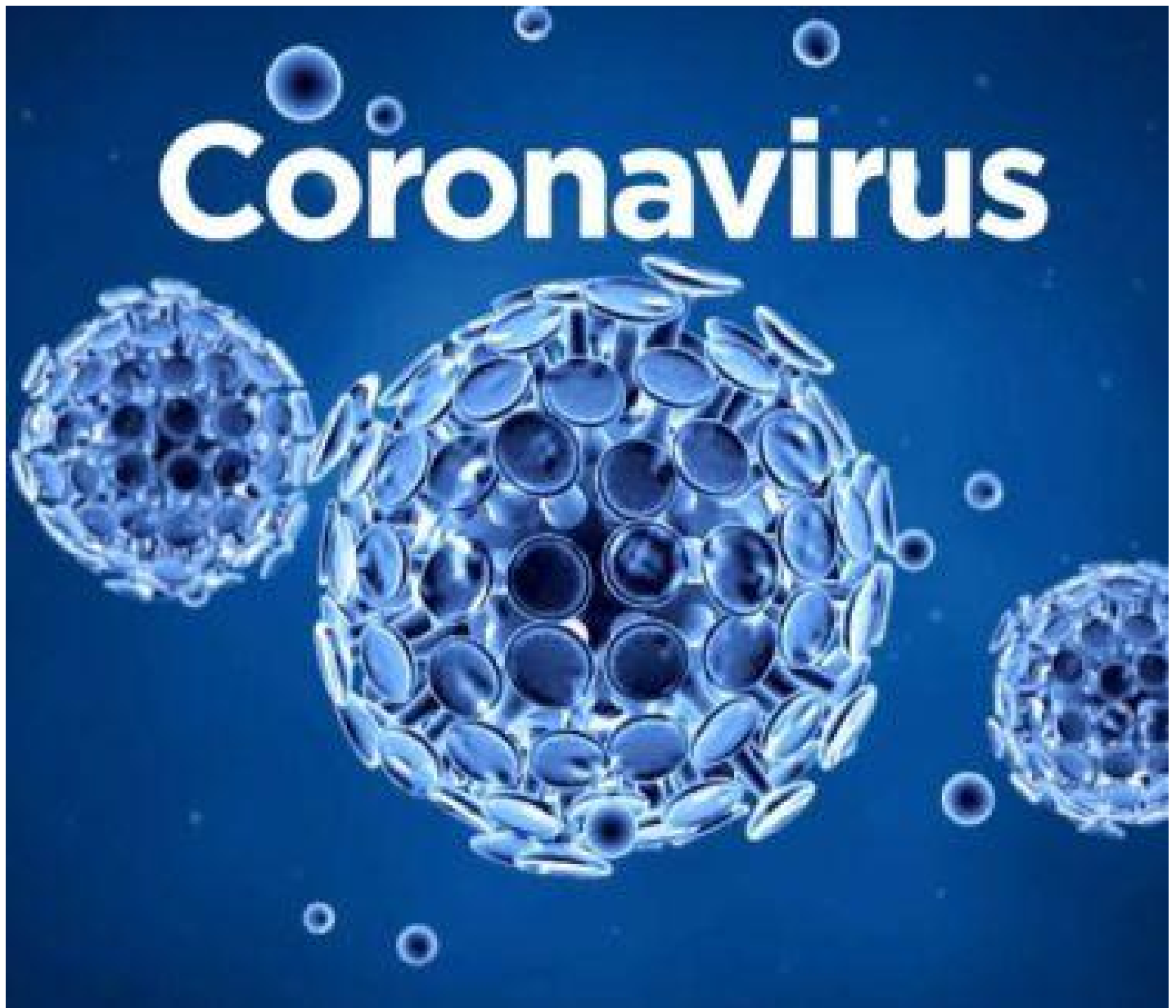


[http://www.insideradio.com/free/despite-pandemic-impact-radio-retained-90-of-its-aqh-audience-in-march/article\\_1fcb9a10-7efa-11ea-9267-1b019fa2570d.html](http://www.insideradio.com/free/despite-pandemic-impact-radio-retained-90-of-its-aqh-audience-in-march/article_1fcb9a10-7efa-11ea-9267-1b019fa2570d.html)

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# Despite Pandemic Impact, Radio Retained 90% Of Its AQH Audience In March.

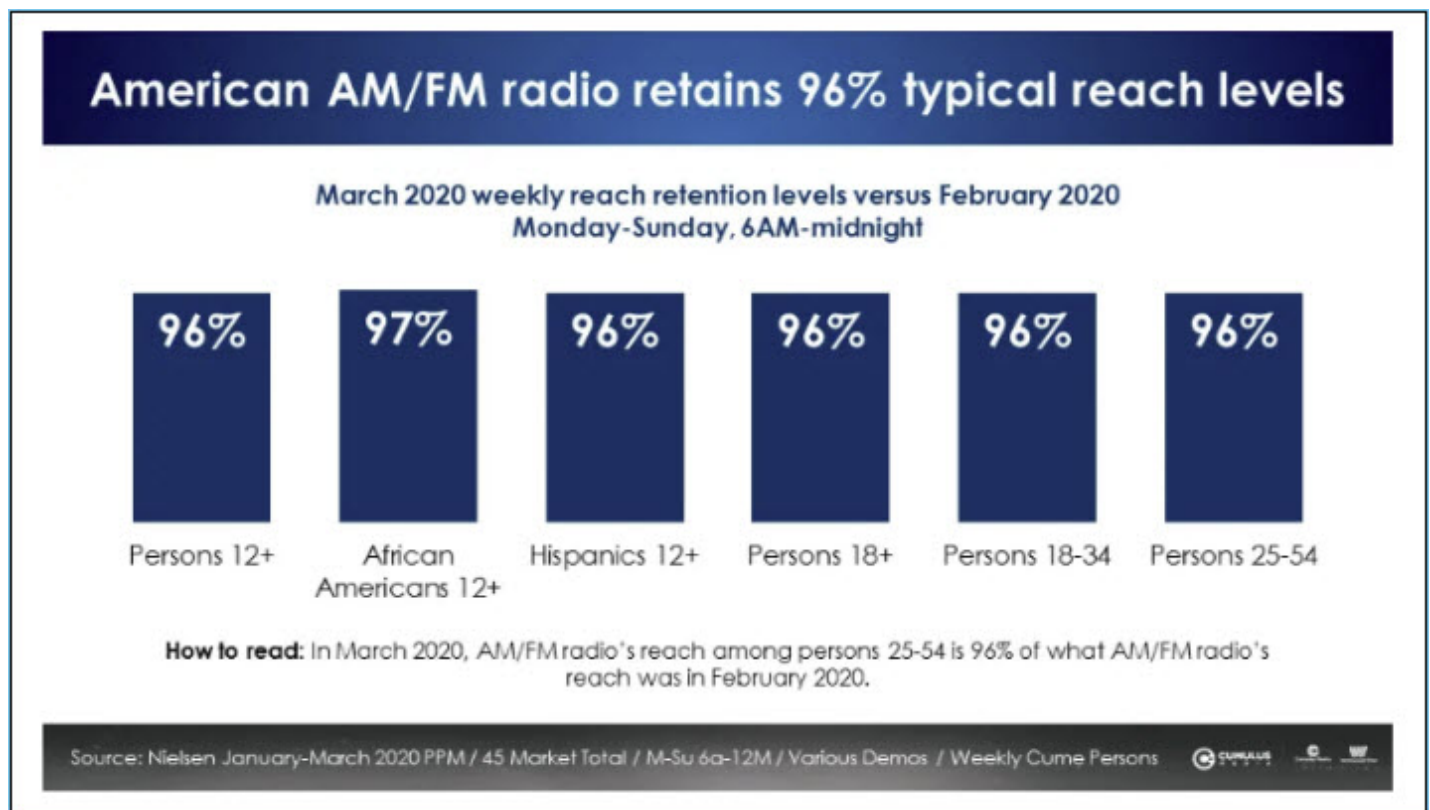
Apr 15, 2020



Ever since much of the country went into lockdown mode, the worry has been that radio listening would suffer from the COVID-19 pandemic. After all, radio is primarily an away-from-home medium. But new data from Nielsen's March survey, which begins releasing today, shows key listening metrics remained remarkably steady with radio retaining 90% of its AQH audience and 96% of its reach during the March survey.

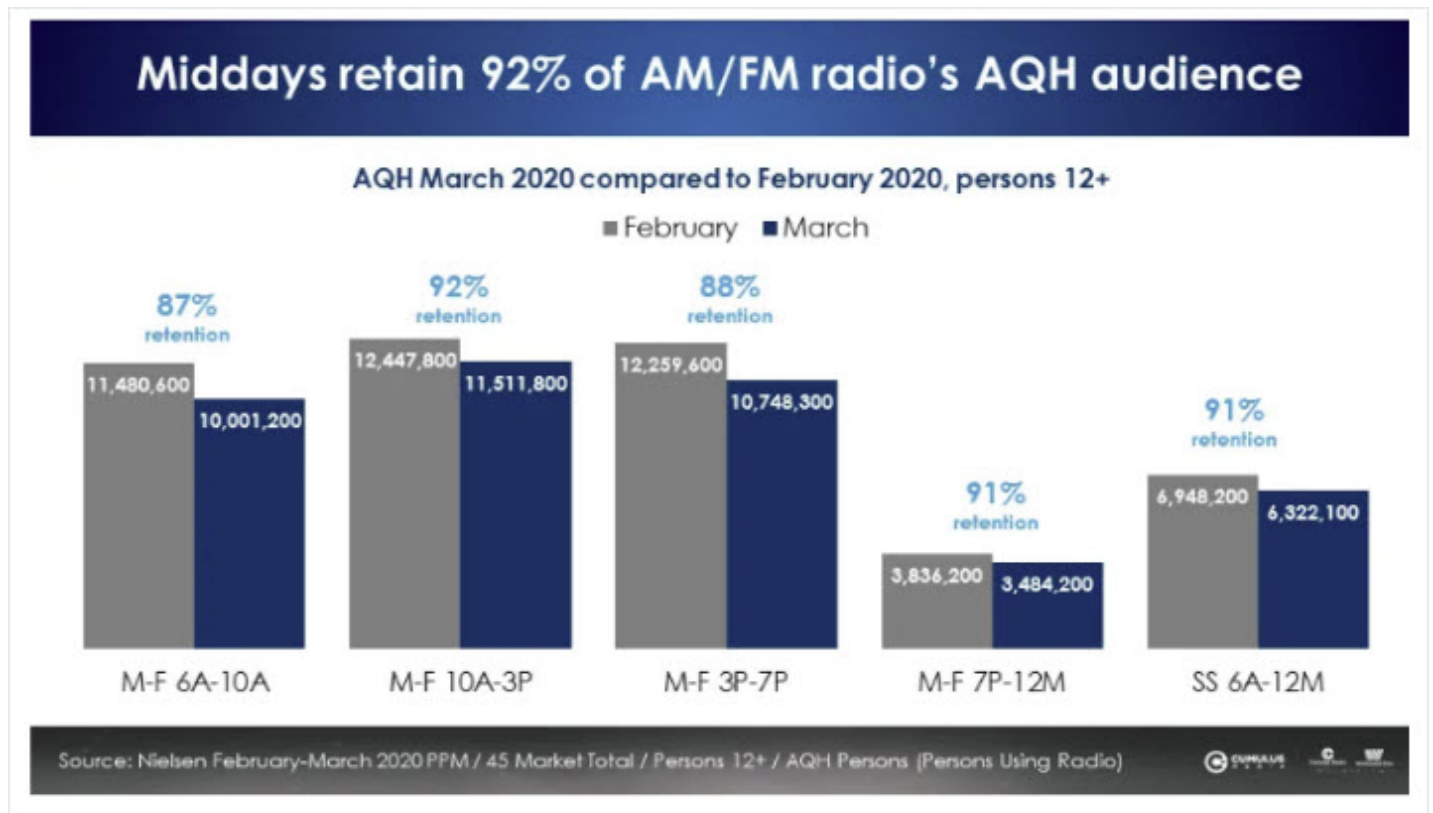
During a pair of webinars Tuesday afternoon with radio and ad agency clients, Nielsen reviewed key listening data points from the 45 PPM markets during the March survey. The numbers clearly show how the stay-at-home orders impacted listening behaviors in the back half of the survey, which covers Feb.27-March 25.

Here's the top takeaway: Comparing March total audience deliveries to February, AM/FM radio maintained nearly all of its audience. "Cume and average quarter-hour audience (AQH) retention was consistent across demographics, race, and ethnicities," Pierre Bouvard, Chief Insights Officer at Cumulus Media and Westwood One, writes in new post on the Everyone's Listening blog. AM/FM radio's reach in the March PPM survey was 96% of what its reach was in the February survey in all the major umbrella demos, including persons 12+, persons 18+, persons 18-34, persons 25-54 and Hispanics 12+. Radio retained 97% of its reach among African Americans 12+.



Looking at the Average Quarter Hour metric, the March PPM survey data shows radio's audience retention varied by daypart with middays (Mon.-Fri., 10am-3pm) performing the best. Radio retained 92% of its AQH audience in middays, followed by nights (Mon.-Fri., 7pm-midnight) at 91%, weekends (Sat.-Sun., 6am-midnight) at 91%. As expected, drive times showed more audience attrition, with mornings (Mon.-Fri., 6-10am) retaining 87% of its AQH and afternoons (Mon.-Fri., 3-7pm) holding onto 88%.

Radio's daypart performance during March lines up with the drastically different lifestyles exhibited by Americans hunkered down at home. "People get out of bed later if they are sheltering at home," Bouvard notes, citing Katz Television data showing a 19% drop in 5-7am TV viewing levels in April versus February for the early news daypart. "Getting up later also impacts AM/FM radio's morning drive," he adds.



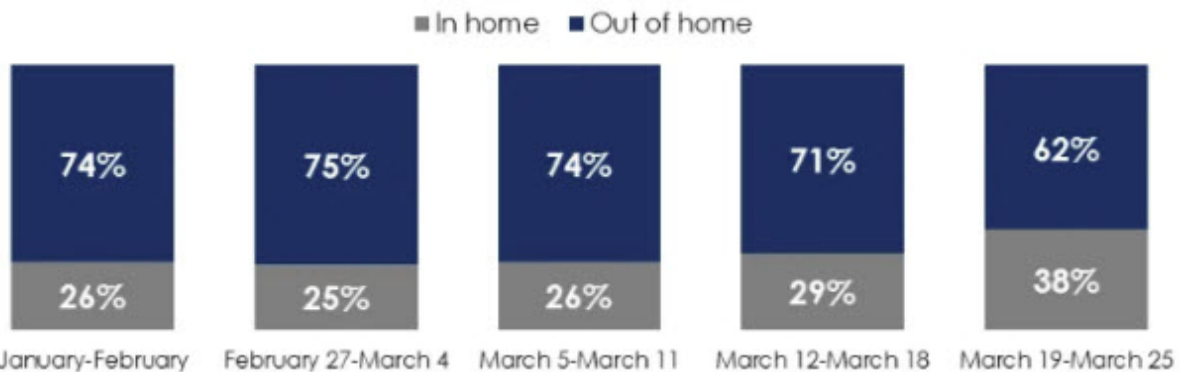
### Out Of Home Listening Remains Strong

In the most eye-opening finding from the new data, the majority of AM/FM radio time spent listening continued to occur out of home, despite lockdowns imposed across most of the country. In a typical month, 74% of persons 18+ listening during the Mon.-Fri., 6am-7pm daypart takes place out of home while 26% happens in-home. In March, 71% of AM/FM radio listening was out of home. Even in the last week of the March survey, the majority of all broadcast radio listening (62%) took place away from home. But in-home listening saw a sharp increase, rising from 26% during the January-February survey period to 38% in week four of the March survey (March 19-25). Still, March week four out-of-home levels were 1.63 times greater than in-home tuning.

The increase in at-home radio consumption is brought into sharper focus when examining time spent listening. During week one of the survey (Feb. 27-March 4), average TSL across all PPM markets for persons 18+ was 45 minutes. That rose slightly to 46 minutes in week two. But week three, reflecting the first days after world health officials declared a global pandemic, saw at-home TSL climb to 48 minutes. And by week four of the survey, Americans spent 58 minutes a day listening to radio in home, a +29% gain over week one.

## Listening shifts to home, but the majority of AM/FM radio time spent continues to occur out of home

Share of AM/FM radio use (AQH) by location, Monday-Friday, 6AM-7PM, persons 18+



**How to read:** March 19-March 25, 62% of all AM/FM radio listening among persons 18+ occurred away from home during Monday-Friday, 6AM-7PM. 38% occurred in the home.

Source: Nielsen March 2020 PPM / 45 Market Total / M-F 6a-7p / Persons 18+ / AQH Persons by Location



Nielsen also analyzed encoded streams of AM/FM radio stations and found that compared to early March, streaming jumped significantly in week three and week four of the March survey. Among persons 18+ during the Mon.-Fri., 6am-7pm daypart, online listening to AM/FM radio was 17% higher in week three (March 12-18) and 45% higher in week four (March 19-25) compared to week one (Feb 27.-March 4).

In another key finding that could help explain the continued strength of out-of-home listening, Nielsen found that essential workers and first responders devote more time to radio than the average listener. March AM/FM radio time spent listening levels for drivers were double the average, police were (1.4 times the average) and healthcare workers 1.2 times the average. While advertisers and agencies have been eager to see how the pandemic affected radio listening levels, the analysis delivers an important message for marketers. "Not all Americans are working from home just because agencies and advertisers are," Bouvard points out. In fact, a study conducted in late March by ad agency Hill Holiday found 37% of those in the workforce are working from home due to the coronavirus and 63% of American workers are still working outside the home.

Bouvard also cautions against generalizing the study results by market. Across Nielsen's 45 PPM markets, there were varying levels of audience retention. The data found a nine-point difference in AQH audience retention across all markets. San Diego, for example, had the greatest month-over-month difference in AQH listening, retaining 86% of its February audience. Minneapolis had the smallest difference, holding onto 95% of its February audience levels. "Interestingly, Seattle and New York City, two markets hit hard by the coronavirus, were mid-pack in the market AQH retention market rankings," said Bouvard.