March

In March 2020, the World Health Organisation declared COVID-19 a worldwide pandemic. On Monday March 23rd, the UK announced an official lockdown, we were asked to stay home, and not to go outside unless for exercise or essential supplies. The schools closed; we were asked only to travel if we were key workers. For many, the only relief from lockdown was clapping for the NHS and carers on Thursday evenings. The Prime Minister, his Health Secretary and the Chief Medical Adviser all tested positive for the virus.

NHS

April

By mid-April, the lockdown was extended by a further three weeks. We spent Easter weekend still at home, social distancing, shielding and self-isolating. The Prime Minister was moved into intensive care. Captain Tom Moore completed 100 laps of his garden, raising over £30 million for the NHS as he approached his 100th birthday.

May

May saw us through two bank holiday weekends, the first falling on Friday May 8th - the 75th anniversary of VE Day. The Government announced a phased approach to easing the lockdown measures as new cases of COVID begin to plateau. “Stay at home” changed to “Stay Alert” and we were allowed to travel anywhere in England. We could even meet outdoors with another household. After 10 weeks, the Clap for Carers came to an end.

June

June brought nice weather and a sense of returning to normality for some. Further restrictions were lifted, we could meet more people from outside our households. The Premier League returned, albeit in empty stadia with artificial crowd noise. Non-essential shops opened; schools welcomed back pupils from certain age groups. An announcement that the hospitality sector would return with limitations from July 4th saw a surge of holiday bookings. A semblance of normality was finally in evidence.

With Face-to-Face recruitment being suspended at the end of March, RAJAR introduced a Tracking Panel to evaluate radio listening during what chronologically is known as Q2 2020. The panel comprised over 1,000 RAJAR recontacts from Q1 2020, all using the same diary version that they originally completed (online or mobile). The participants were asked to keep a diary for one week each month.

The market overview that follows is based on the first three waves of the Tracking Panel, comparing listening through April, May and June with pre-lockdown Q1. In addition, we have used some data from our BBC and Commercial Stakeholders from their own independent case studies during lockdown and these are sourced accordingly.

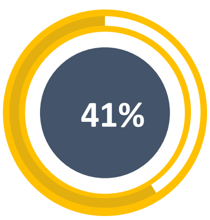
Mid March - Lockdown begins

Lockdown saw increased listening to radio, especially during the lead up to the government announcement, and immediately after when public anxiety was at its highest levels. Listening in home, and online especially, saw an increase due to the majority of the population being confined and unable to travel. The increase in listening is mirrored across the tracking surveys by Global (1) , Bauer (2), BBC (3) and RAJAR's own Tracking panel.

From the BBC Compass Data (2) we understand there was an increase in listening in both Reach and Hours during the time Covid-19 was confirmed as a Global Pandemic. Reach increased by 1% and Hours grew by 11% (compared to Q1 2020, adults 16+) during the week commencing March 16th.

According to government data (4), by the end of March only 36% of the normal number of vehicles were on the road and only 5% of the normal London Tube users.

Speech and News stations were being favoured in pre-lockdown and early lockdown with listeners wanting information around the crisis. According to the Global tracker (1), listeners were feeling more scared, less resilient and more unsure during this period, hence the increased need for additional news/information.



41% of participants claimed to 'feel scared' due to the virus via Global Radio's tracker (1) around the same time.

Early April – Radio During Lockdown

In the first wave of the RAJAR Tracking Panel we saw an 8% increase in 'Average Hours Per Listener' against All Adults 15+ in comparison against the panel members' original Q1 2020 data. Average listening session length for All Adults 15+ was 1 hour and 42 minutes, up from 1hour 14 minutes , an increase of 39%. Longer listening sessions are indicative of people being in fewer locations and not being on the move.

As we were all spending more time at home, naturally in-home listening was rising while listening at work or in the car declined. With no school runs or commuting to work, we saw that listeners were not rising as early and starting their newfound morning routines slightly later. The breakfast peak moved accordingly from 8am to 10am. Listening at the weekend saw similar morning peaks, with listeners tuning in a little later than usual and weekend listening hours increased by 11% compared to Q1 2020.

During lockdown we saw almost 88% of listening hours were happening at home, 7% at work and only 5% in a motor vehicle. This coincides with the government reported decline in traffic by this point in the lockdown.

Reach levels overall remained healthy, compared to pre-lockdown. At Home increased by 11%, while listening in a vehicle fell by 49% and at work/elsewhere was down by 64% compared to these locations in Q1 2020.

Late April – Mid May

Another three weeks of lockdown was announced in mid-April and we saw listening habits start to change slightly from the initial 'Stay Home' advice. Listeners started moving away from more news centric stations and opting for music stations. People were now tuning in to more stations with over four million claiming that they had tuned into a station they had never listened to before.

With more time to listen, people were enjoying having background noise or radio as accompaniment in the home. Almost a third of participants claimed to be listening to more radio than previously and among this group, people were listening to 20% more hours in an average week. The listeners who were now enjoying more radio than before the Coronavirus crisis tuned in for 6.3 days in an average week compared to 5.8 before the pandemic.

From the small proportion of listeners (23%) that claimed to be listening to radio less in lockdown, the majority claimed that this was because their daily routine was now different.

The online server stats from Bauer (2) and Global (5))show how online radio consumption continued to grow at this time.

As per the previous wave, the midweek morning peak remained later than it was before we were advised to stay at home. Weekend listening in May saw a 2% increase in Reach compared to the April wave. Both Bauer online stats, Global Online Stats and BBC Compass showed an uplift in listening over the May Bank Holiday. Friday May 8th saw VE Day celebrations with many radio brands commemorating the 75th anniversary with specialist programming. Absolute Radio added the 1940's to their Decades family and the special occasion was marked throughout the BBC Network, with BBC Radio 2 dedicating every show.

End of May – Easing of Lockdown

In mid-May, as the Government advice changed to 'stay alert and return to work if you can', we saw the traffic returning to the road; albeit around half of what it would normally be. Public transport use began to increase and it followed that where people were listening was beginning to shift. The share of listening hours at home decreased to 86% from 88% in April. Reciprocally, listening at work and in the car began to rise, to 8% and 6% respectively.

The number and length of listening sessions was still higher than before lockdown. Almost a third of those asked claimed to be listening to more radio than before and gave the reasons that they 'still have more time' and to 'provide them with background noise at home' as the main reasons for this. Those individuals that listened to more radio through this extended lockdown period were listening to 4% more in an average week. On the flipside, of those listening to less radio now in the easing of lockdown, more than three quarter said this is because their listening habits had now changed.

The RAJAR tracking data showed us almost half of those who listen to more radio chose to listen to middle of the road/easy listening music stations. This corresponds with Global's tracking survey that indicated listeners were less scared than before and more resilient. Over five million listeners claimed to tune into a new station they have discovered whilst in lockdown. This relates to respondents now choosing more stations in their repertoire (10.4 v 8.8)

Other Listening

Not only did we ask the participants about their radio listening habits and how they have changed during lockdown, but we asked them about Podcasting and On Demand Music services too. Over half of those asked said that their use of On Demand Music services such as Spotify, Apple and Amazon Music had remained the same as before the Pandemic.

Around two thirds of Podcasters claimed their podcast listening was the same as before, and those who claimed to be listening to more Podcasts in lockdown said it was because they had more time to do so.

June – Further easing of Lockdown

Moving toward the easing of lockdown, the morning peak is still slightly later than usual but seems to peak for a longer period. Listening on the weekend has remained higher than the beginning of the year just like the survey waves before. Additionally, as some of us are back to work, online and DTV hours are decreasing and traditional radio sets increasing – most likely due to the increase in car journeys. The share of hours in-home declines to 80%, while listening at work and in-car both increase to 10%. With 76% of the usual volume of traffic returning to the roads by mid-June, in-car listening increased by a third, compared to May.

We asked the participants their thoughts on whether radio was rising to the challenge of informing and entertaining listeners through this difficult period. There was an overwhelming amount of positivity in the comments, from people feeling their mental health benefitted to finding radio as the most trustworthy source of news regarding the crisis. Radio has proved itself to be a highly resilient medium throughout the Coronavirus crisis. Despite radical change and disruption to lifestyles and routines, it has remained as relevant and essential as ever, even seeing growth in audiences and repertoires, with evidence of many people discovering or rediscovering the most durable of broadcast formats.

Index	Q1 2020	April V Q1	May V Q1	June V Q1
Reach	100	98	98	98
Av Hours Per Listener	100	108	110	108

In conclusion, we understand that radio listening increased quickly in the immediate weeks of lockdown in March. Over the Tracking Survey weeks we saw 'All Radio' reach decline marginally in comparison to Q1 2020 (compared with Tracker participants Q1 2020 RAJAR diary data), most likely due to the reduction of listening in the car and at work. However, listening hours remained high throughout. Most notably, listening Online has continued to thrive through March to June due to most of us still being at home.

RAJAR Tracker Panel

Sample Size	1071
Wave 1	30-Mar to 05-Apr
Wave 2	27-Apr to 03-May
Wave 3	01-Jun to 07-Jun

Other Sources

1. Global Corona Tracker – (a nationally representative survey of 1000 radio listeners in each wave across UK)
2. Bauer online stats
3. BBC Compass
4. Department for Transport statistics
5. Global online stats

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