

BPR's Audio Uncovered - 2021

The Changing Face Of Global Audio Listenership in 2021 and Beyond



Broadcast Programming & Research

BPR - All Audio Perspective

The audio marketplace has changed rapidly over the past decade, with a massive expansion in platforms where listeners can spend their time. Where once traditional broadcast radio ruled the roost, digital and online radio, music streaming and podcasting have all seen significant growth in recent years and upended much of the conventional wisdom for Audio content creators.

However despite this expansion in offerings, there has been very little research publicly available digging deep into the wider Audio Landscape. This is why BPR, in conjunction with Ovation Research & Norstat, have launched its All Audio Study to help both our clients and the wider industry gain perspective on the current marketplace and what's driving the changes within.

With 4000 respondents across 8 international markets the All Audio Study is one of the most in-depth looks into the changing ways consumers are interacting with Audio. Diving deep into not just the audio audience's topline listening behaviors, but what's driving the interactions and overlaps between all these mediums.





Sample Analysis

4000 surveys were conducted from the 9-18th September 2021. The study was conducted with 18-54 Men & Women, demographically weighted to each market, who had listened to some form of audio in the past week.

As a global study, it featured 500 respondents from 8 different key international cities to give a wider perspective on the trends in audio listening across many western markets, with the results of all 8 market averaged as the total used in this report. Those cities are:

- London, United Kingdom
- Berlin, Germany
- Paris, France
- Prague, Czech Republic
- Moscow, Russia
- Stockholm, Sweden
- Madrid, Spain
- Sydney, Australia

Topline Insights

At a topline level the audio environment is incredibly robust, with strong, highly engaged audiences for Radio, Streaming & Podcasting. All three Audio Mediums co-existing with one another with a significant audience shared between all three – there are few loyalists exclusive to just one audio type within the audio space.

- **Radio remains the most listened to audio platform, despite the increased competition**

While Radio has seen some of its use shift from the traditional AM & FM bands to more listening Online and via Digital Frequencies, it continues to hold the largest share of listening across most markets surveyed. The strength of radio continues to be its ability to mix both personalities & music, helping to drive a more personal connection between radio & its audience.

- **Music Streaming's usage is also high, now almost matching Radio's reach**

Since its introduction Music Streaming has made significant gains, it now has almost the same level of market penetration as Radio with near identical levels of time spent as well. Despite this, Radio has remained resilient, Music Streaming not undercutting Radio in the way we may have expected when it was first introduced, the two exist as complementary services to one another.

- **Podcasts offer a new and well defined supplementary choice**

Only 29% of audio listeners have listened to a podcast in the past week, and time spent listening to podcasts is significantly lower compared to Radio or Music Streaming listening. Podcasts also have the lowest level of exclusive listeners, just 2% of the audio environment only listening to podcast – at present it looks to be a secondary audio choice in the current environment, something to supplement radio and music streaming listening as part of a consumer's wider audio diet.



Key Listening Statistic

Radio still most listened Audio across the world



BPR Research conducted with **4000 respondents** in London, Paris, Berlin, Stockholm, Madrid, Prague, Moscow & Sydney in September 2021

What do people listen to?

77% of Audio Consumers listened to radio in the past week, streaming is close behind **71%** listening.



Time Spent with Media

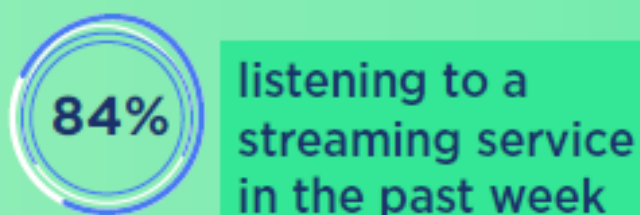
Radio & Streaming users spend **46 mins a day** listening to those services. Podcasting is lower, with those users spending **28 minutes per day** listening.



Age Group Differences

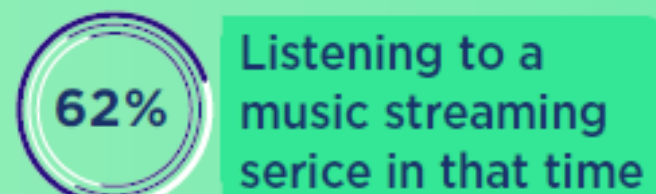
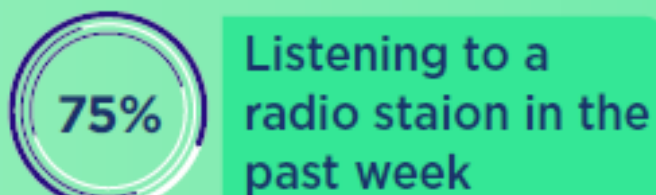
18-34

Music Streaming dominates



35-54

Radio is stronger



Streaming

Music Streaming is dominated by Spotify

66% Spotify

37% Youtube

23% Amazon



Two out of every three Spotify users have a paid subscription, while 1/3rd use the ad-supported platform.



Youtube Music however is more driven by ad-supported listeners, with 83% of those using the service not having a paid subscription

Podcast Content

Comedy, News & Politics Interview Podcasts are the most popular genres. However there is a clear demographic divide in age preferences.

AGE

18-34

Comedy dominates, with limited interest in the more serious genres

35-54

True Crime, Longform Documentary and News & Politics podcasts all have higher engagement levels

Future outlook for Radio listening

70% of listeners say they'll listen to about the same amount of radio in the next year, **20%** say they'll listen to radio more.

AGES
18-34

24%

will listen to more radio

15%

say they will listen less

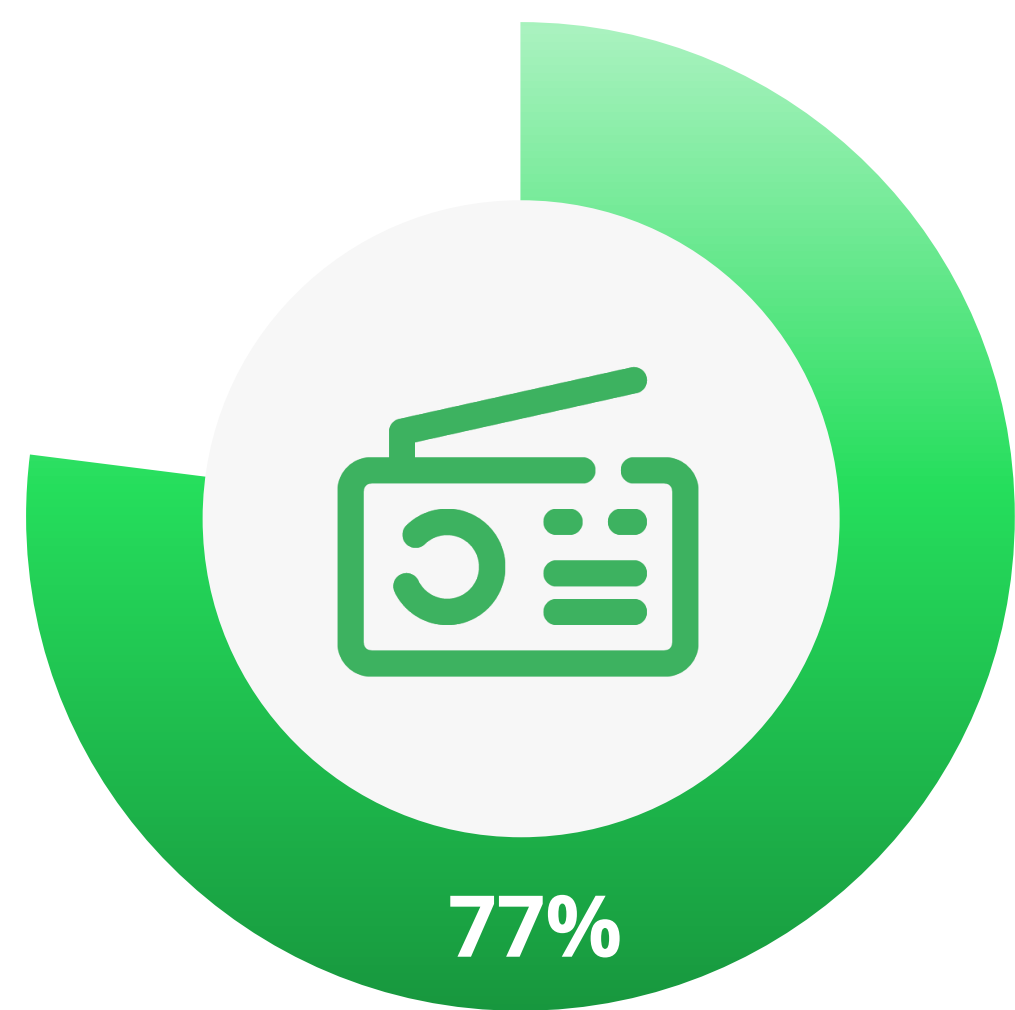
Why listeners come back to radio after using music streams or podcasts

40% say their main reason for returning to radio is the music mix. Even with the choice of Music streaming, radio's music images continue to be a key driver to bring listeners back to radio.



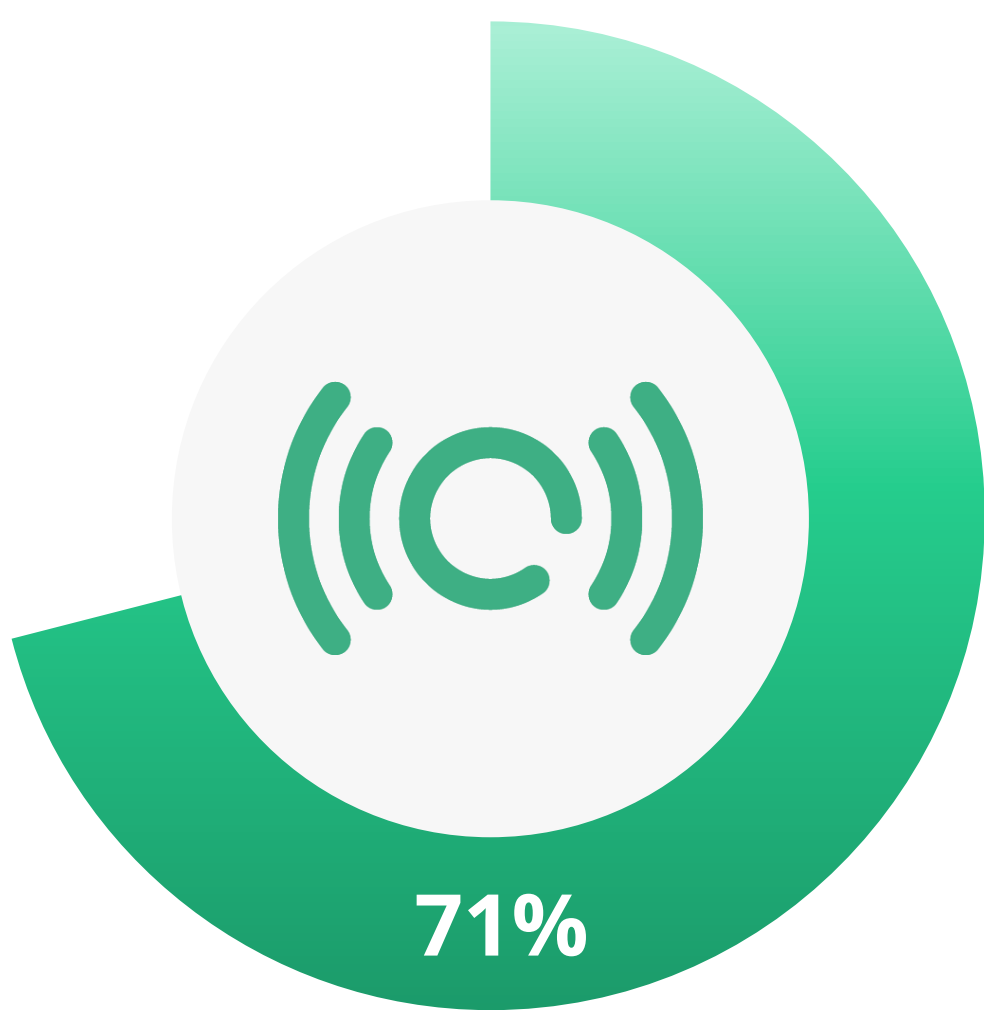
Radio Has The Largest Audience Of All Audio Listening, However Streamed Music Is Close Behind

Despite increased competition Radio, both traditional AM/FM, Digital & Online, remains the most listened to audio platform with 77% of audio listeners having tuned in in the past week. Music Streaming is a close second here, while podcasts maintain a smaller niche of the market – not yet in as wider use as the other audio platforms



Listened To Radio In The Past Week

Radio continuing to hold a dominate position in the Audio landscape despite the increased competition.



Streamed Music In The Past Week

Music Streaming is clearly a significant competitor for Radio, these services in very wide use and on the radar for Audio Listeners



Listened To Podcasts In The Past Week

Podcasts are currently more niche, not yet in wide usage by the market, however there's clearly a large untapped audience for the format here.

Source: In the past week, have you listened to any of the following (Please select as many as apply):
N: 4000

25-34 Men & Women n=1200

72% Listened To Radio 

82% Streamed Music 

33% Listened To Podcasts 

35-44 Men & Women n=1284

 **83%** Listened To Radio

 **69%** Streamed Music

 **30%** Listened To Podcasts

45-54 Men & Women n=1284

87% Listened To Radio 

56% Streamed Music 

24% Listened To Podcasts 

18-24 Men & Women n=501

 **58%** Listened To Radio

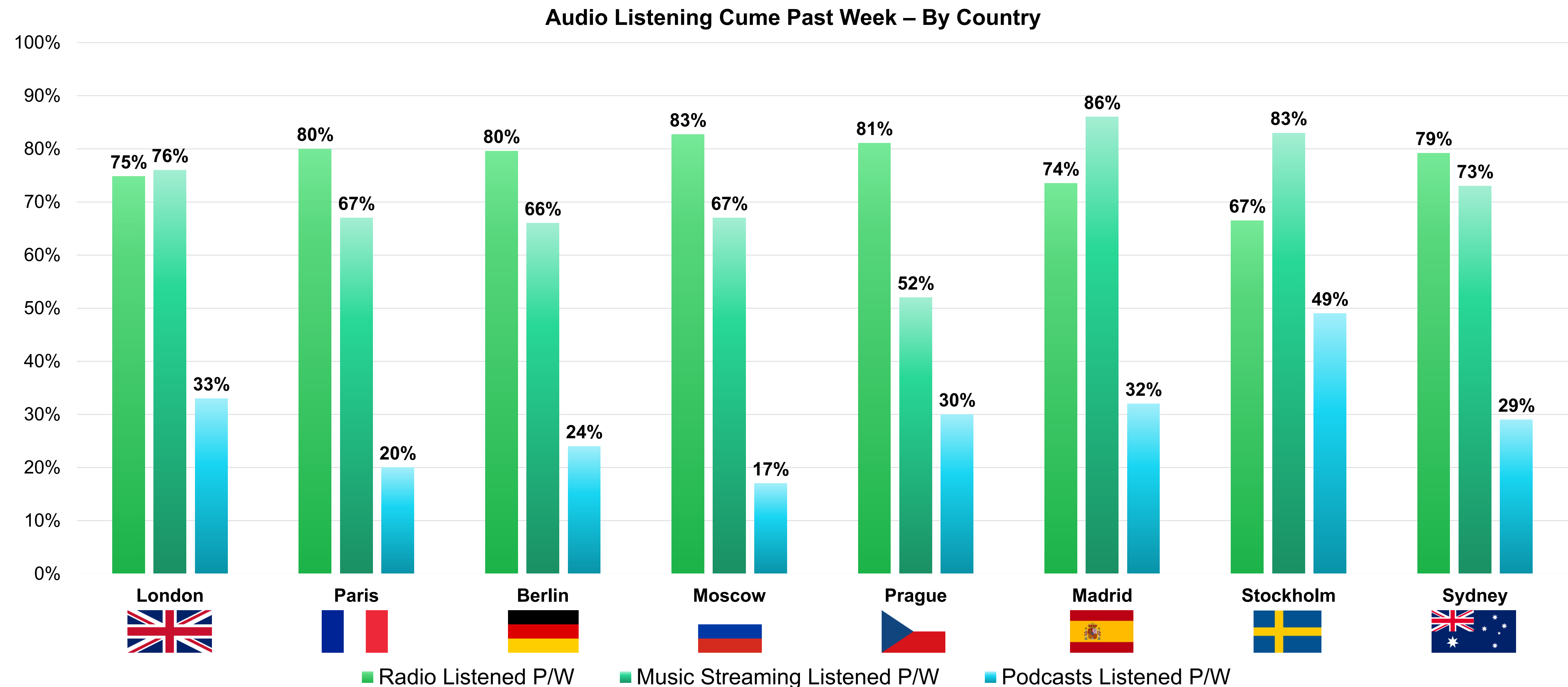
 **84%** Streamed Music

 **30%** Listened To Podcasts

**Age Groups:
Audio listening in the
past week**

In Nearly Every Market Radio The Most Listened To Audio Platform

Moscow & Prague have the highest results for radio and the lowest for music streaming, while Madrid & Stockholm are the most significant outliers here. Podcasting has relatively varied results across the markets researched, ranging anywhere from 17% in Moscow up to nearly 50% in Stockholm, it's a medium that clearly hasn't reached its full potential in many markets yet.

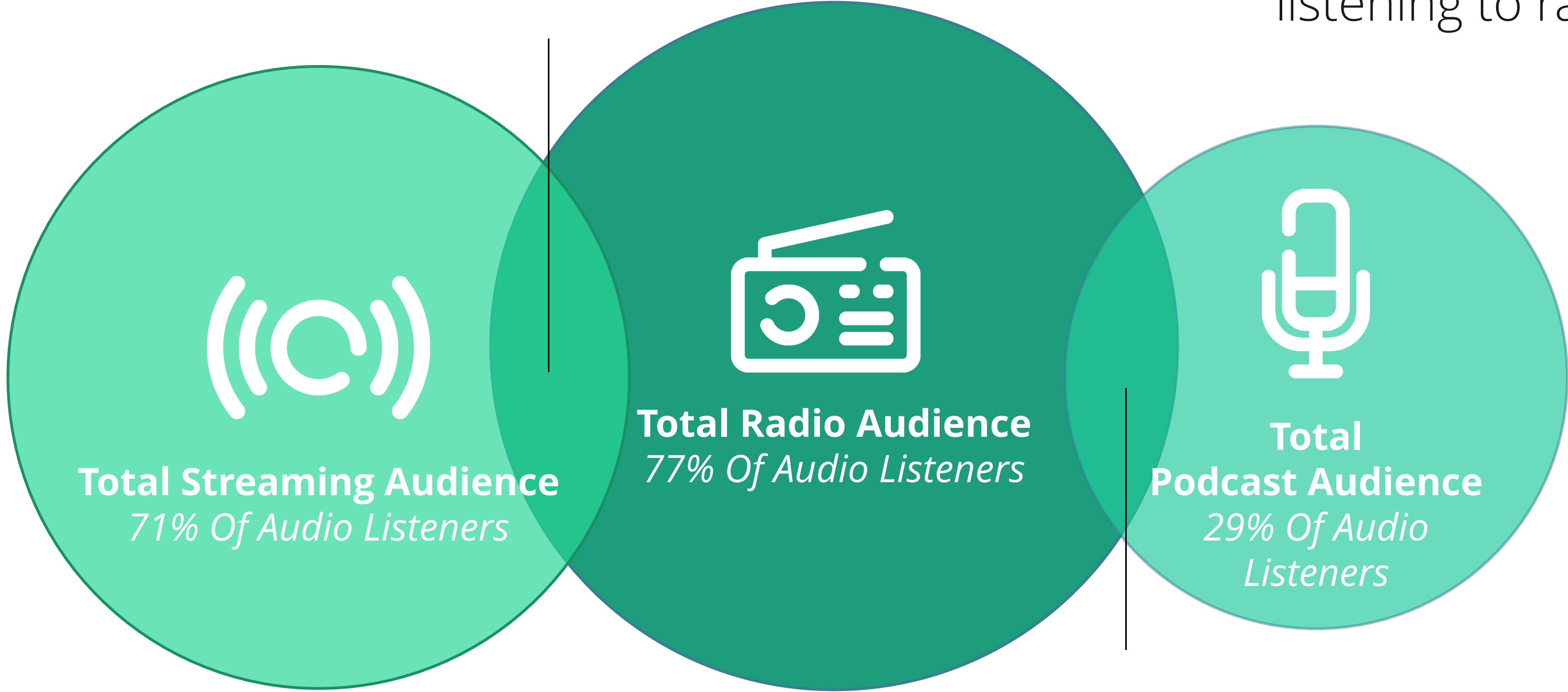


Source: In the past week, have you listened to any of the following (Please select as many as apply):
N: 4000

Radio, Music Streaming & Podcasting All Have A Significant Audience Overlap

- ▶ **65%** Of Radio Listeners also listened to Music Streaming In The Past Week.
- ▶ **70%** Of Music Streaming Listeners Also Listened To Radio

Radio & Streaming share a similar level of audience overlap, and while few radio listeners are using podcasts, a vast majority of podcast listeners are listening to radio.



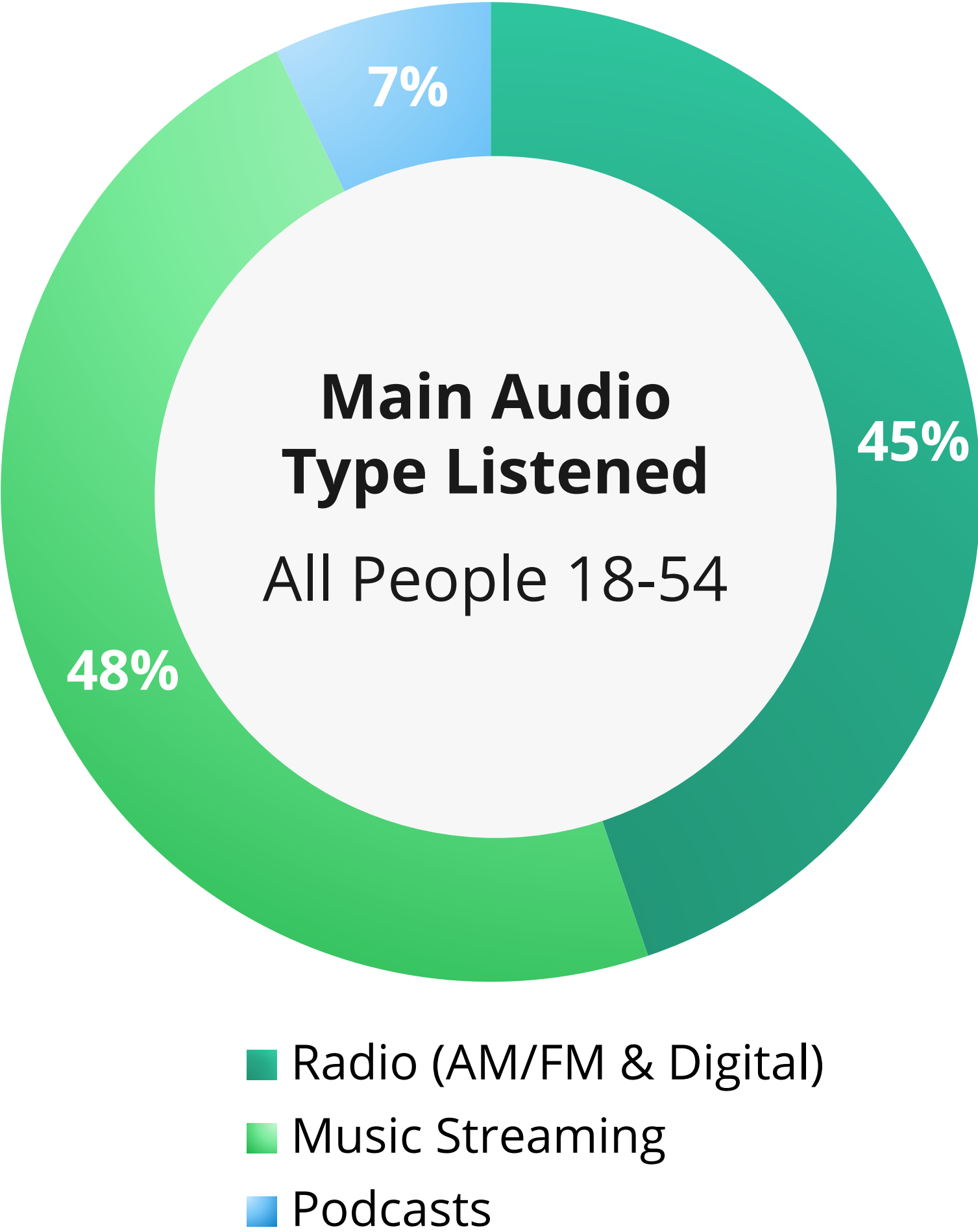
There are few listeners in the Audio environment listening to just one medium in any week, few platforms having an exclusive ownership of their listeners. However there is some unique audience for each:

- ▶ **31%** of Radio Listeners listen **only** to Radio, **24%** of the total audio audience are listening exclusively to Radio
- ▶ **21%** of the Music Streaming audience are exclusive to those platforms, with **15%** of the total audio environment exclusively listening to streaming
- ▶ Podcasts have the highest overlap and the lowest exclusive audience, just **5%** of podcast listeners are listening **only** to that platform, representing just **2%** of the total audio environment.

- ▶ **28%** Of Radio Listeners also listened to Podcasts In The Past Week.
- ▶ **74%** Of Podcast Listeners Also Listened To Radio

Source: In the past week, have you listened to any of the following (Please select as many as apply):
N: 4000

While Radio Has The Higher Cumulative Audience, More People View Streaming As Their Main Audio Type



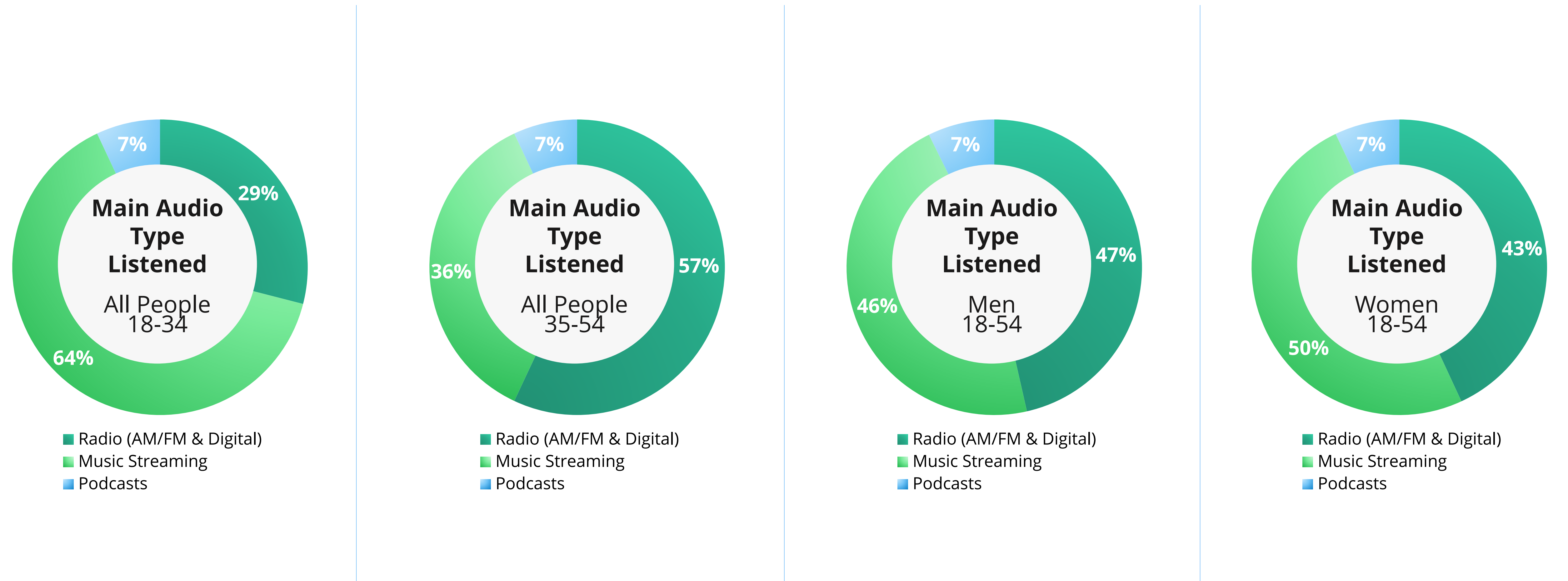
These results highlight the shifting allegiances within the audio space, Radio has the wider reach, but music streaming is the first choice for slightly more of the marketplace

The lower performance of podcasting is also worth highlighting here, with just 7% of respondents saying it's their main audio type. Podcasting is still seen as an ancillary medium even amongst its users, something to supplement their radio & streaming listening rather than being the main attraction in of itself.

- ▶ **58%** of radio listeners said Radio was their main source of Audio, with **37%** saying Music Streaming & **5%** Podcasts
- ▶ For Music Streaming listeners **26%** said Radio was their main source of Audio, with **68%** saying Music Streaming & **7%** Podcasts
- ▶ Just **25%** of Podcast listeners said that medium was their Main Audio type, with Radio at **26%** & Music Streaming at **50%** - again highlighting that podcasts are a supplemental choice for many of its listeners

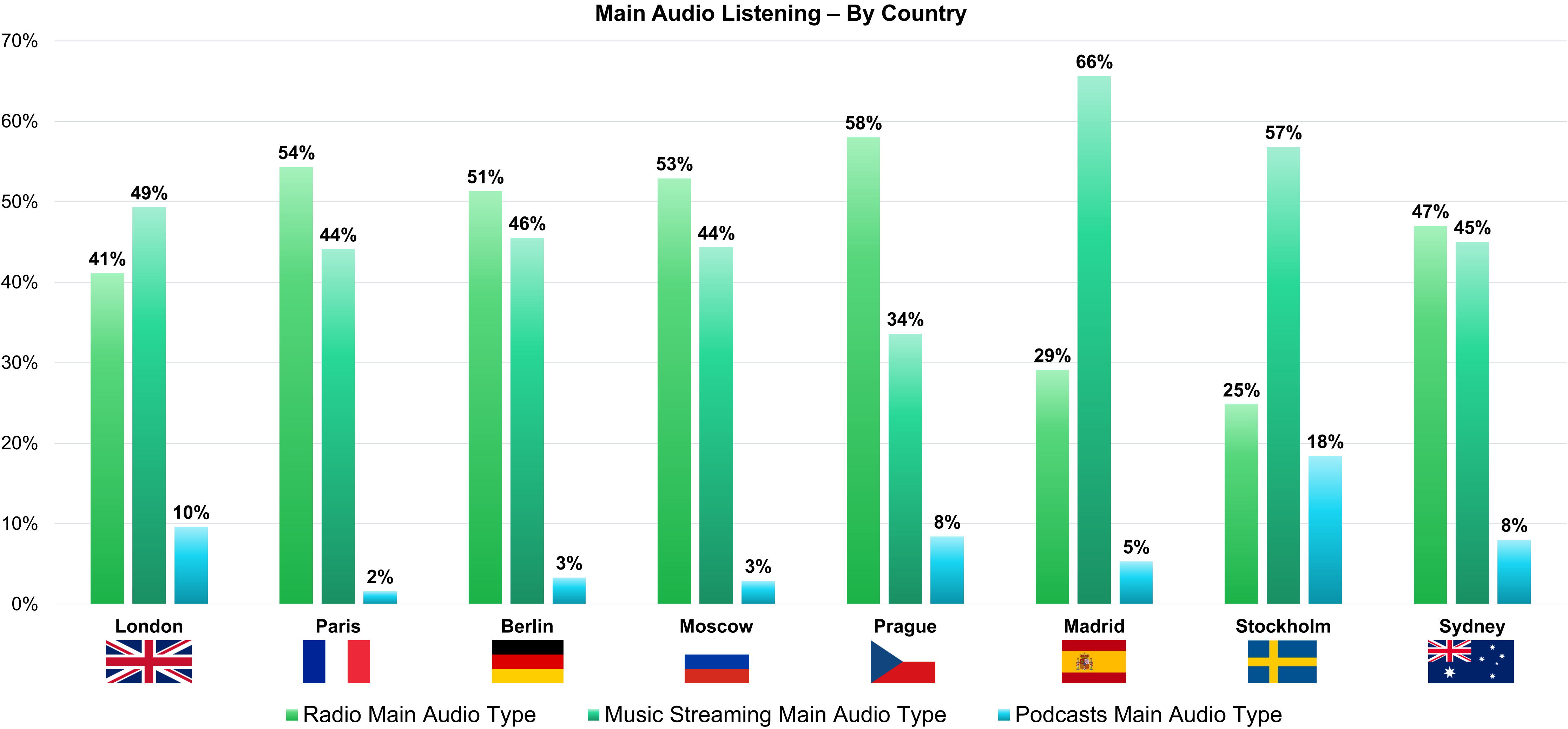
Streaming The Main Audio Type In The Younger Demos, While 35-54 Radio Is Dominant

We see an interesting divide between Men & Women as well, with Women much more likely to prefer streaming music while Men are slightly more in favor of radio. Podcasts see a consistent 7% across most demographics and breakdowns, across many different audience groups in this study Podcasting's support doesn't vary significantly.



Source: What would you say is the main type of Audio you listen too?
N: 4000

Radio Is The Main Audio Type Across Most European Cities, Stockholm & Madrid Are The Exception



Source: What would you say is the main type of Audio you listen too?
N: 4000

25% Of Audio Listeners Have Changed Their Main Type Of Audio Listened In The Past 3 Months



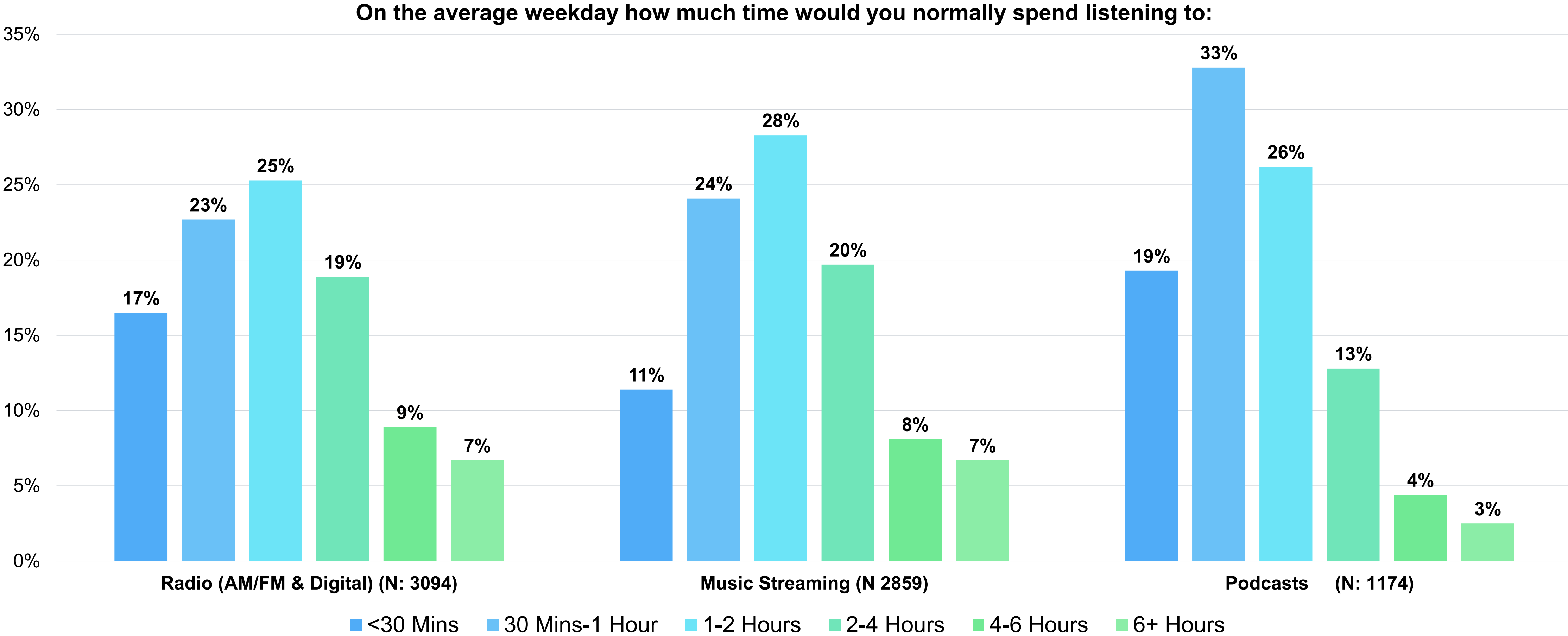
With $\frac{1}{4}$ Of Audio Listeners Switching Their Main Audio Format In The Past 3 Months, There's Clearly A High Level Of Fluidity In Audio Listening, And It Doesn't Just Favor The New Media Players.

It's in the younger demographics where we see with highest level of shifting allegiances, with **30% of those 18-24** switching their main audio type. For those 45-54 this falls to **21%**.

- ▶ There are slight variations between genders, with **27%** of Men & **23%** of women changing their main audio format in the past 3 months
- ▶ Paris (**7%**) & Prague (**18%**) are the markets with the lowest levels of change
- ▶ Stockholm continues to be the market with the most volatility, with **59%** of that city changing its main audio type over that period.

Radio & Streaming Users Spend Nearly Identical Amounts Of Time With Each Platform

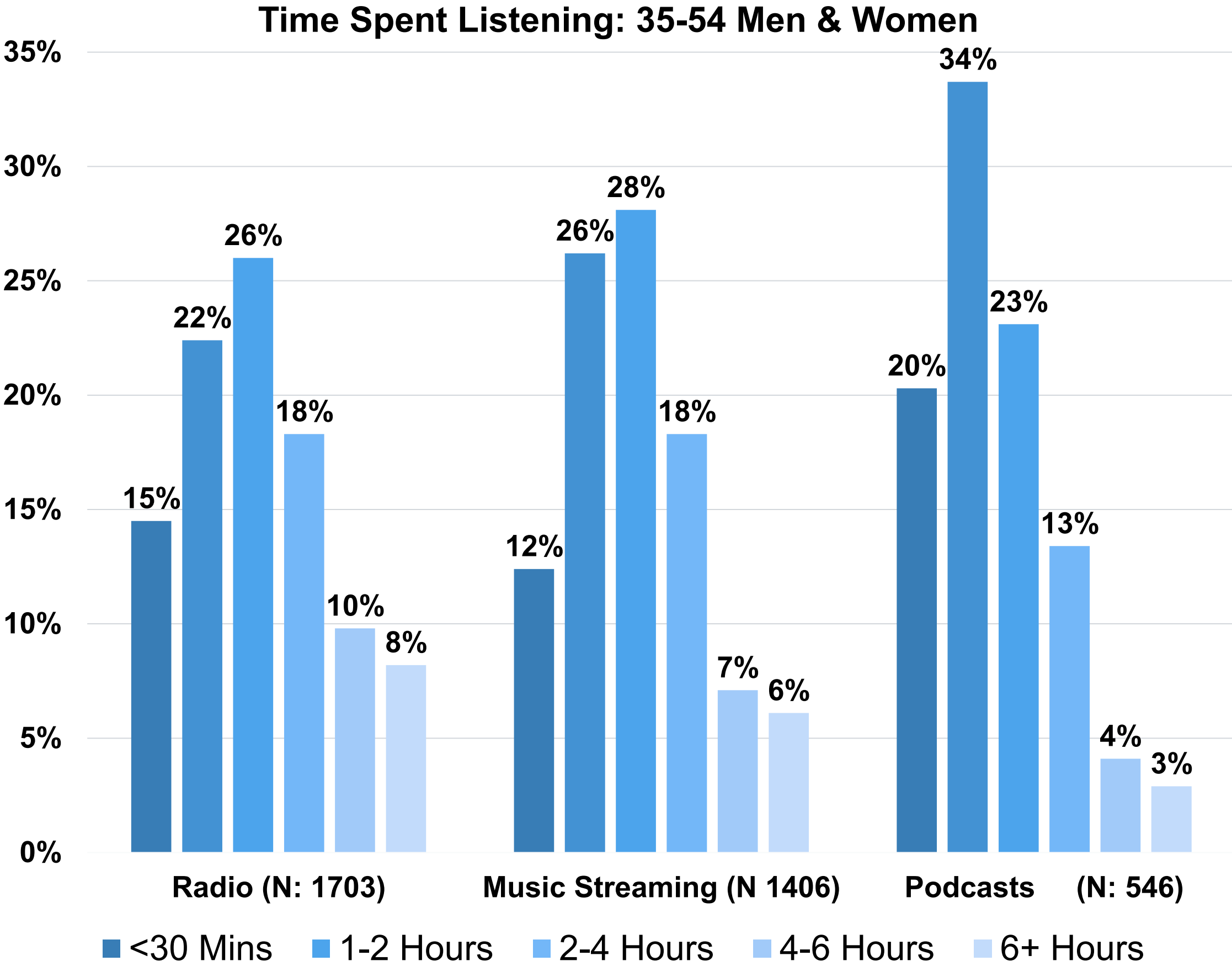
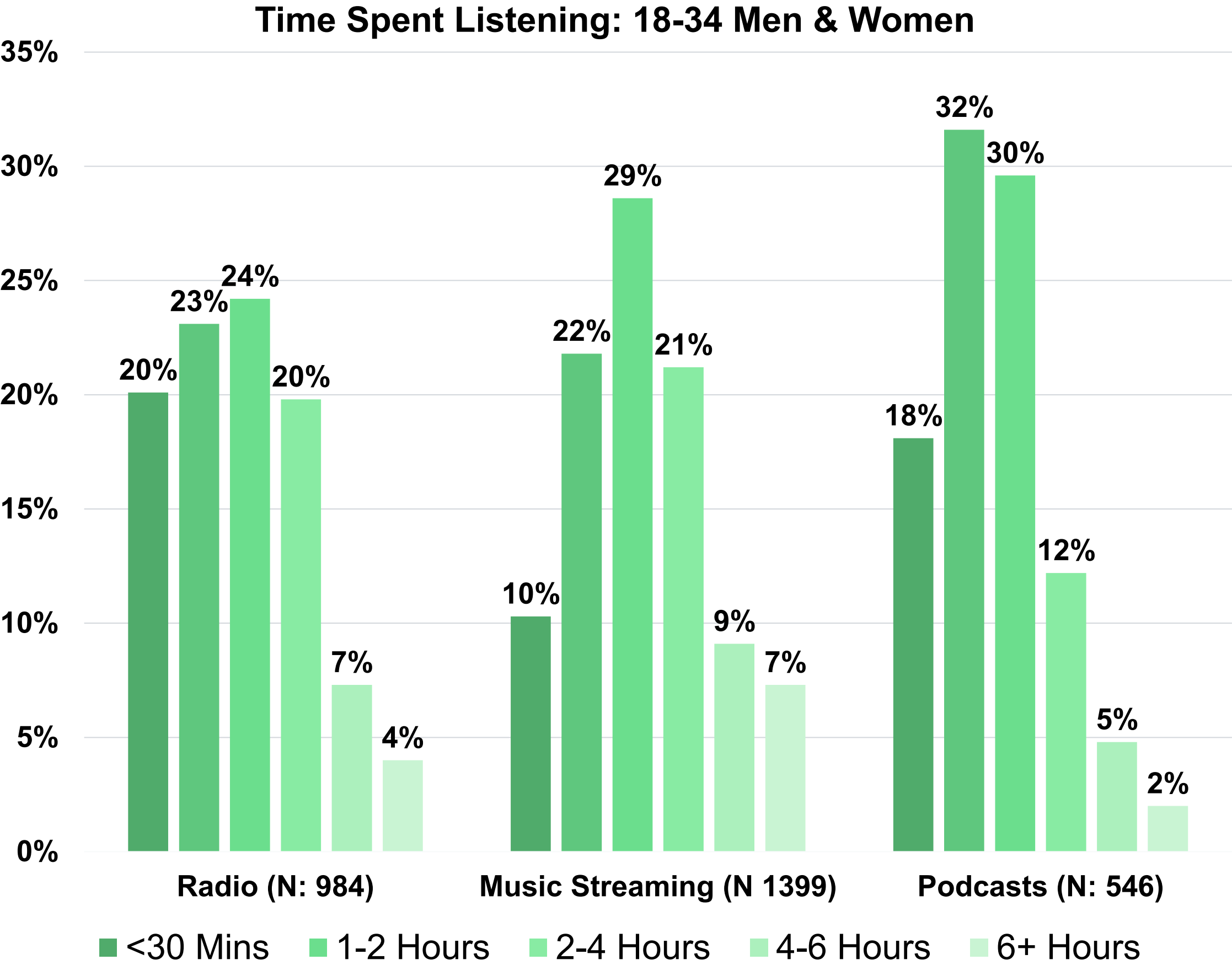
There's a close similarity in the TSL results for both Broadcast Radio & Music Streaming, the two seeing similar levels of engagement. Podcasts have a slightly lower TSL, few listening for more than an hour a day. Again podcasts do look to exists in a slightly secondary position with fewer overall listeners, and those listeners engaging for a shorter period of time.



Source: On the average weekday how much time would you normally spend listening to:
N: 3094, 2859, 1174

Younger Listeners Spend More Time Streaming Than Their Older Counterparts, Although The Difference Is Relatively Small

There's slightly lower engagement for radio with those aged 18-34, fewer listening for multiple hours a day compared to their older counterparts. Interestingly, the streaming results are almost identical here, there isn't a sharp divide between how younger and older listeners engage with those platforms.



Source: On the average weekday how much time would you normally spend listening to:
N: 4000

Radio Holds The Largest Share Of Listening, But Music Streaming Is Close Behind

Looking at the total share of listening and Radio remains the leading audio platform, however we again see Music Streaming close to even with Radio's results. 18-34 Music Streaming is in front, but Radio is close behind, while 35-54 Radio has a much stronger lead. Podcasting again sees relatively similar results across demographic groups – there is a committed audience for the audio format that isn't as bound to broad demographics in the way Radio or music streaming listening is.

Share Of Total Listening	Radio (AM/FM & Digital)	Music Streaming (Spotify, YouTube Music, Etc.)	Podcasts
Total	45%	42%	12%
18-34 Men & Women	43%	44%	13%
35-54 Men & Women	49%	38%	13%
18-54 Men	46%	41%	13%
18-54 Women	44%	44%	12%

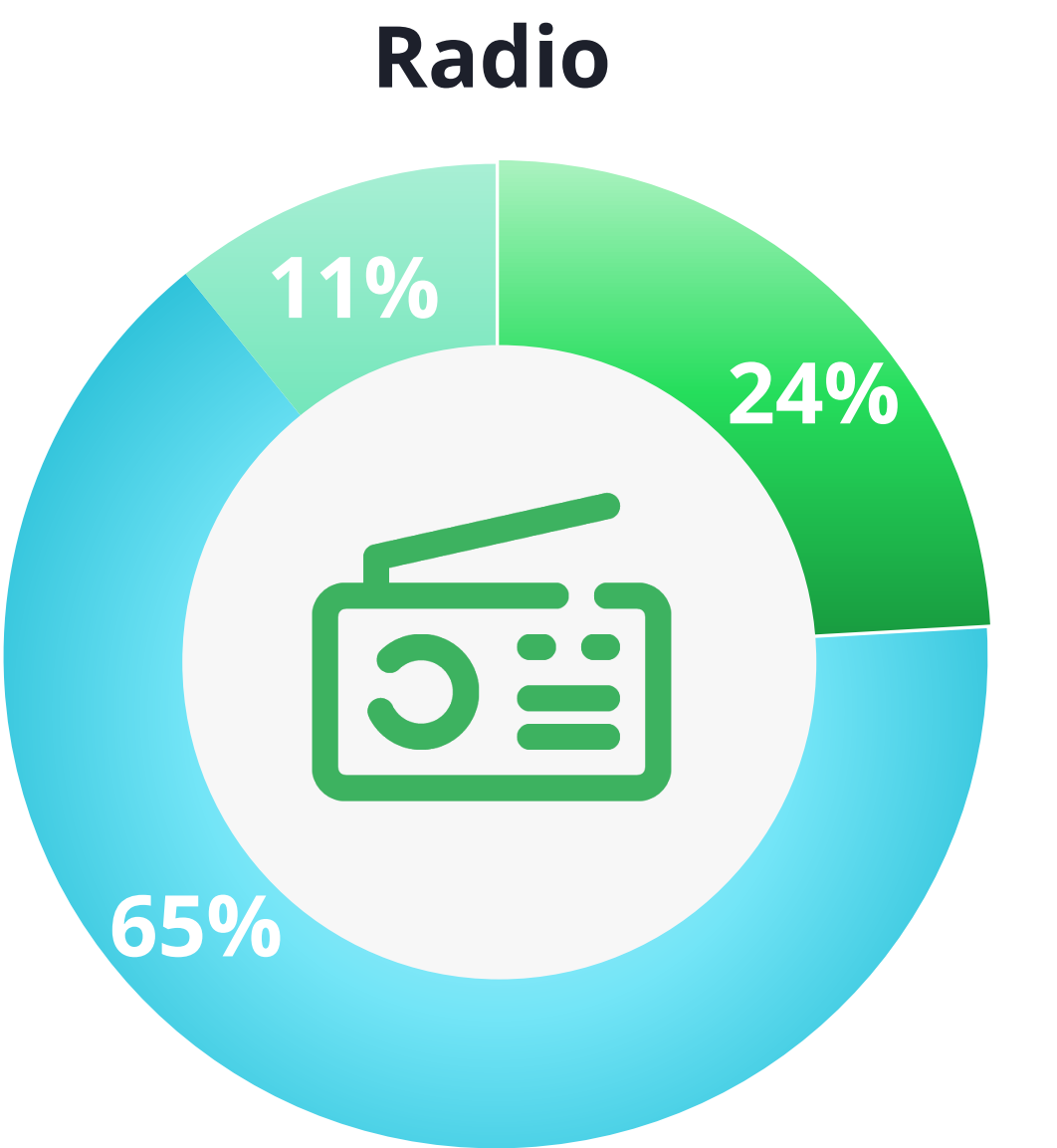
In Almost Every Market Radio Is Dominant, Stockholm & London The Only Cities Where Music Streaming Has Higher Share

Radio holds the largest share of listening across most markets survey, with music streaming in front only in London & Stockholm. Again we see weaker performance for Podcasts & Music Streaming across many of the central-European cities and in Moscow, while Radio overperforms the average in all these markets.

Share Of Total Listening	Radio (AM/FM & Digital)	Music Streaming (Spotify, YouTube Music, Etc.)	Podcasts
Sydney (N: 500)	43%	43%	14%
London (N: 500)	39%	46%	15%
Paris (N: 500)	47%	44%	9%
Berlin (N: 500)	50%	40%	10%
Moscow (N: 500)	52%	41%	7%
Prague (N: 500)	58%	32%	9%
Madrid (N: 500)	44%	41%	15%
Stockholm (N: 500)	31%	48%	21%

The Vast Majority Of Audio Consumers Are Planning On Listening More Next Year

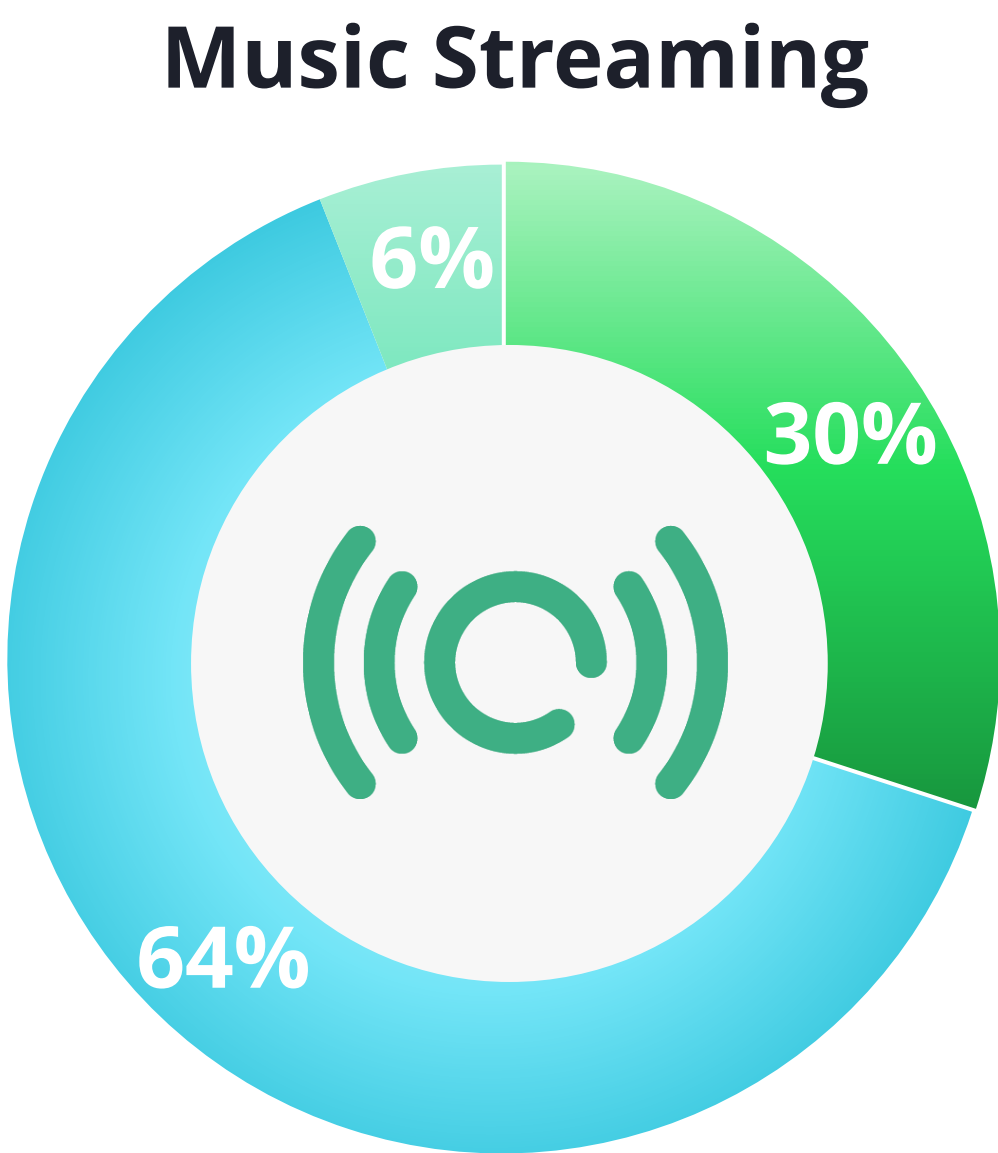
Will You Be Listening to More or Less of the Following Media in the Next Year:



■ Listen More ■ About The Same
■ Listen Less

More Or Less Radio In The Next Year

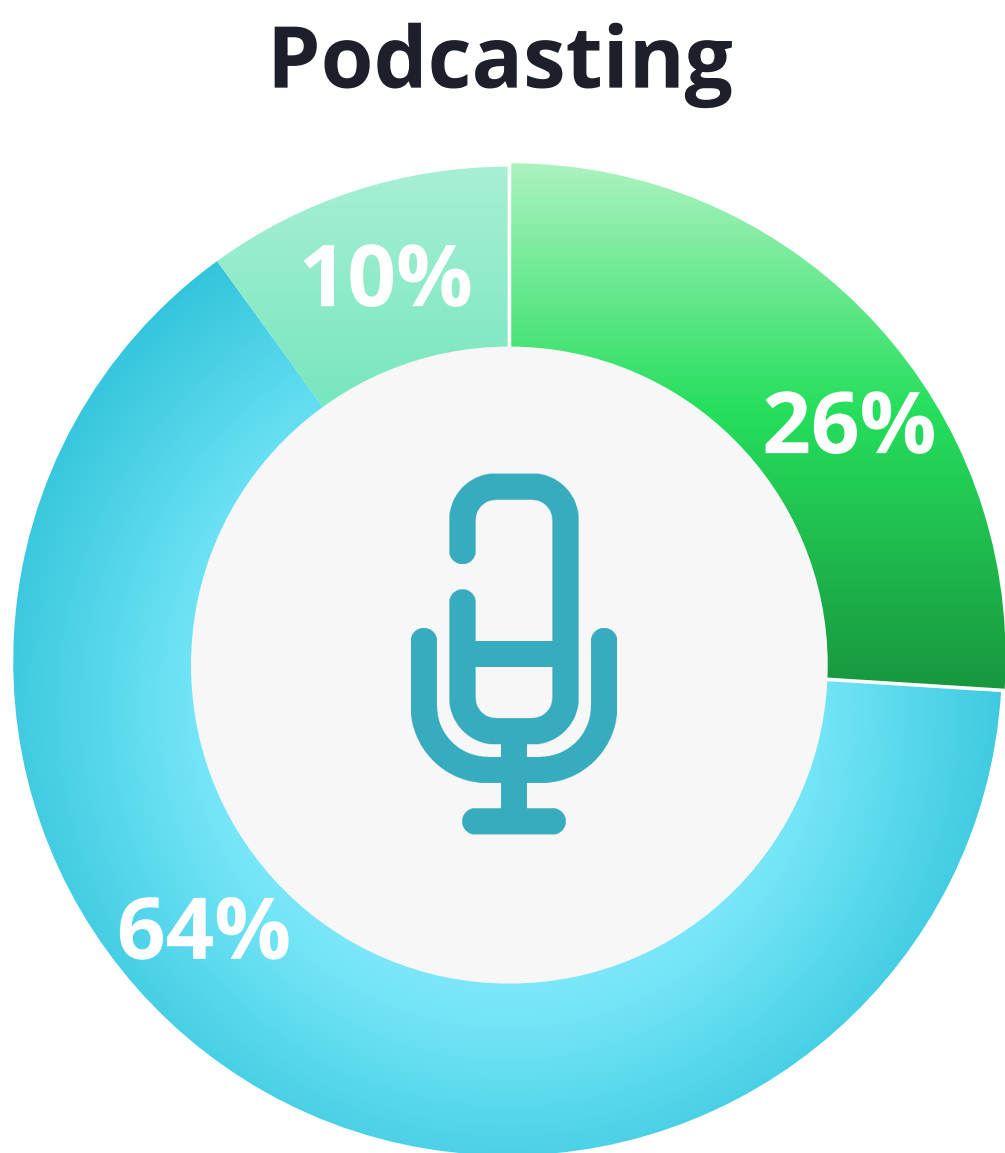
Despite the challenges for radio, respondents still feel they'll be listening more in the year ahead



■ Listen More ■ About The Same
■ Listen Less

More Or Less Streaming Music In The Next Year

Music Streaming is set to grow slightly ahead of the potential growth seen for radio, with few saying they'll be listening less



■ Listen More ■ About The Same
■ Listen Less

More Or Less Podcasts In The Next Year

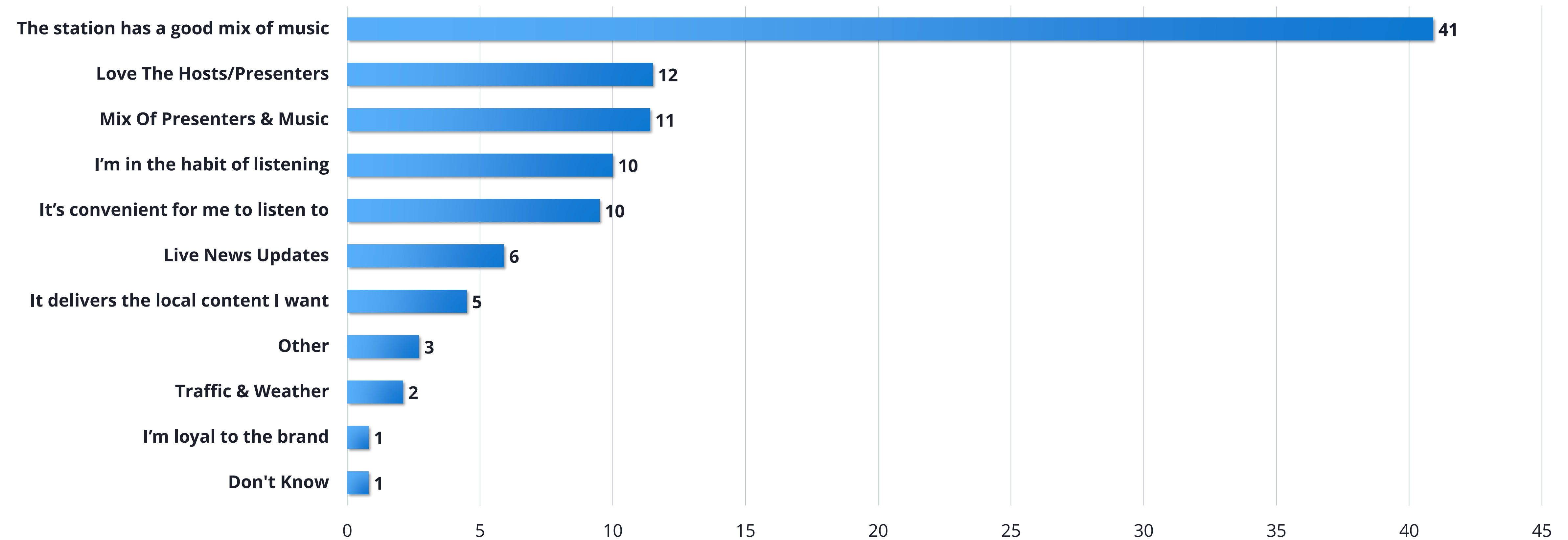
Podcasts see very similar results to Radio, while there are additional competitors for the share of listening we're not seeing many respondents discounting radio at the expense of the newer formats.

Source: Thinking ahead, do you feel you'll be listening to more, less or about the same amount of radio, music streaming & podcasts in the next year
N: 4000

Music Mix & Personalities Are The Main Drivers To Listen To Radio

Even in the music streaming era, Radio’s music mix remains one of the main reasons to listen to the platform for much of its audience. While Streaming is offering a similar product currently it hasn’t diluted the radio audience’s interest in the music on offer on the platform. The Hosts & Presenters also a top tier driver here, as is Radio’s ability to meld both music and personalities together – Radio’s strength continuing to be the versatility of the platform & it’s ease of use compared to streaming and podcasts.

What Is The Main Reason You Choose To Listen To Radio:



Source: Thinking about radio, what is the main reason you choose to listen:
N: 2687

Spotify Dominates The Music Streaming Space

Unsurprisingly, Spotify has the largest user base of any of the music streaming services, with none of its competitors coming close to matching it. YouTube, Amazon & Apple Music all have the next highest subscription rates, but it's clear Spotify is the leader within this space.

Streaming Service Usage	User Rate As % Of Total Market	User Rate As % Of Music Streaming Ecosystem
Spotify User	49%	70%
YouTube Music User	26%	37%
Amazon Music User	17%	24%
Apple Music User	14%	19%
Soundcloud User	9%	13%
Deezer User	6%	9%
Tidal User	5%	7%
Other Music Steamer User	3%	4%

Source: Which of the following music streaming services do you use:
N: 2859

Spotify Leads In Most Markets, London Has The Most Diverse Streaming Service Usage

With Stockholm being Spotify’s home market, its unsurprising to see just how high its userbase is in that city and how suppressed all other streamers are. Amazon & Apple Music look to be largely market by market driven services, their userbase varying wildly country to country.

	Spotify User	YouTube Music User	Amazon Music User	Apple Music User	Soundcloud User	Deezer User	Tidal User	Other Music Steamer User
Total	49%	26%	17%	14%	9%	6%	5%	3%
Sydney	56%	20%	14%	22%	10%	4%	5%	2%
London	61%	31%	24%	25%	18%	7%	5%	3%
Paris	34%	26%	12%	10%	5%	26%	4%	1%
Berlin	43%	25%	19%	14%	10%	7%	3%	3%
Moscow	14%	22%	46%	15%	8%	3%	23%	3%
Prague	36%	27%	1%	8%	4%	1%	1%	2%
Madrid	74%	42%	26%	13%	9%	4%	3%	2%
Stockholm	77%	17%	0%	3%	9%	0%	1%	2%

Source: Which of the following music streaming services do you use:
N: 2859

News, Interview & Comedy Podcasts The Genres With The Highest Audience Listenership

We also see all three genres the top choice for the Podcast audiences “Main” genre as well. Business, Tech & Fiction podcasts all having the lowest engagement rates, and while Sport podcasts are also low here, the high Main Podcast Genre result does suggest that there’s committed, passionate fan base for these types of shows.

Podcast Genre - Total Podcast Listeners	Main Podcast Genre %	Total Genre Audience %
Current News & Politics Podcasts	14%	44%
Interview Podcasts	11%	43%
Comedy Podcasts	15%	42%
Longform Documentary & Investigation Podcasts	10%	39%
Other Podcasts	9%	32%
Music Podcasts	8%	30%
History Podcasts	3%	27%
True Crime Podcasts	8%	26%
TV, Movies & Other Pop Culture Podcasts	5%	25%
Sports Podcasts	9%	24%
Business Podcasts	5%	24%
Technology Podcasts	3%	22%
Fiction/Narrative Podcasts	2%	16%

Source: Thinking about podcasts, which genre would you say you is the main type of show you listen to; Thinking about Podcasts, what other genre’s of shows do you listen too
N: 1174

Where Does This Leave Radio?

What this study highlights is that Radio remains a relatively robust medium despite the challenges facing it from the changing audio landscape. There are additional challenges and competitors in the current era, but Radio as a whole is performing strongly and the audio consumers remains highly engaged with the medium.

- **Radio's Strength Remains Its Ability To Build Relationship With Listeners**

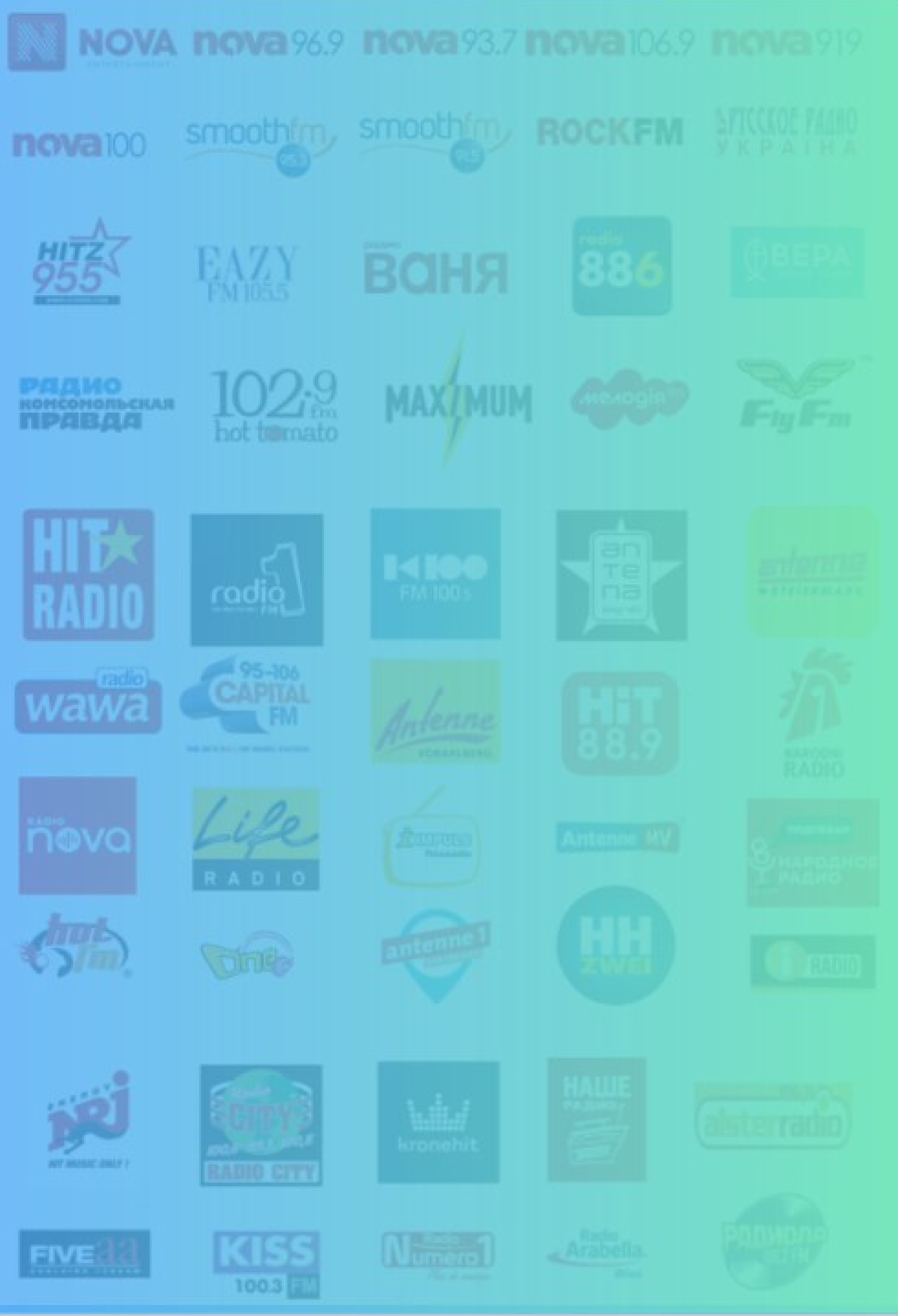
Despite the increased competition from new audio sources Radio has maintained its position as the leader in the audio space. What has helped drive Radio is its ability to create that connection with listeners through its brands, personalities, music & localism. Radio stations still remaining top of mind and having that connection with audio consumers as they continue offer a more personable, deeper relationship with their audience than music streaming can deliver.

- **Despite Streaming's Wide Reach, Radio Isn't Outmatched On The Music Front**

On paper, Music Streaming should be severely undercutting Radio's ability to make headway in the music space, offering audio consumers more choice often with limited advertising interruptions. Despite this 40% of respondents said a radio station's music mix was their main reason to listen to radio, Radio still clearly holding a position in audience's minds as a place to go for music listening in the new environment. This bodes well for Radio's future, the medium not as vulnerable as we might expect from music streaming and there is clearly still a sizeable music driven audience for Radio despite the alternatives on offer.

- **With Few Exclusive Listeners, The Podcast Audience Is Still Clearly Engaged With Radio**

74% of Podcast listeners are also listening to Radio, and while Podcasts as a medium is still relatively young there's a clear relationship between it and traditional broadcast radio. With Radio's long experience in creating audio content there are significant opportunities for Radio networks to own the Podcasting space going forwards – no other Podcast provider will have as direct a platform to reach potential podcast listeners with new shows, nor the same opportunity to grow the space in the years to come.



Who We Are

Broadcast Programming & Research is a market leader in data driven consultancy for broadcast networks across the globe. With over 35 years experience working with some of the world's biggest Radio & Television Networks few media research companies have the breadth of experience and understanding of the changing audience habits and how media companies can best equip themselves to face the challenges of a shifting media environment.

Contact Us

To find out more about BPR & the tailored research options we can create for your stations, please visit our [website](#), subscribe to the [BPR Newsletter](#), or get in touch with our consultants:

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