



BPR's Audio Uncovered

Part 2: Unlocking Radio's Future

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BPR's All Audio Perspective

The audio marketplace has changed rapidly over the past decade, where once consumers had limited options we've seen a massive expansion of what's on offer. Traditional broadcast radio is now facing increased competition in the Audio space as digital and online radio, music streaming and podcasting have all gained traction with consumers.

Despite this there has been little research into the wider Audio Landscape. This is why BPR has launched it's All Audio Study to bring greater insight into the new environment and highlight the changes in audience behavior.

The All Audio study interviewed 4000 respondents in 8 markets. This makes it one of the most in-depth studies conducted into the changing patterns of Audio use. Helping to give both traditional and new audio content makers a greater understanding of listeners changing habits and relationships with these mediums.



Sample Details

4000 interviews were conducted between the 9th and 18th September 2021.

The Sample consisted 18-54 Men & Women, demographically weighted to each market, who had listened to some form of audio in the past week.

Each market's sample included 500 respondents.

Key international cities were chosen to provide a wider perspective and a broader listener base. Those cities surveyed being:

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

Topline Insights

The audio marketplace has become increasingly diversified over the past decade, however radio maintains its leading position. Radio is the audio format with the widest reach and the highest number of listeners using it as their main audio source. While there is increased competition for listeners in the changed environment, Radio has performed incredibly well.

- **Radio is strongest among listeners aged 35+, but continues to have high reach in the younger demographics**

Radio is the audio format of choice with those aged 35-54, with the vast majority choosing it as their main audio option. While Radio reaches the majority of those aged 18-34, it's not the same priority for younger listeners. Radio is on their radar and part of their audio diet, but isn't the same leading force as it is with older listeners.

- **CHR, Adult Contemporary & News Talk are the strongest formats across all markets surveyed**

The presence of all three formats across the 8 cities we researched helped boost their profile, every market having at least 1 if not more CHR, AC & News Talk stations. The similarity of results in most markets also highlight that while there are local interests driving different audience behaviours in most cities, there is still common trends across global markets.

- **The Music Mix And Ease Of Use Are Radio's Biggest Drivers**

Music is what motivates radio listeners to tune into their favourite station. While Streamed Music offers its users more choice & control we're not seeing that impact Radio's ability to be a destination for its music mix. In fact, Radio's easily accessible & curated music provides a unique advantage compared to Spotify and other streamers.

- **Across Every Market, Listeners Are Planning To Listen To More Radio In The Next Year**

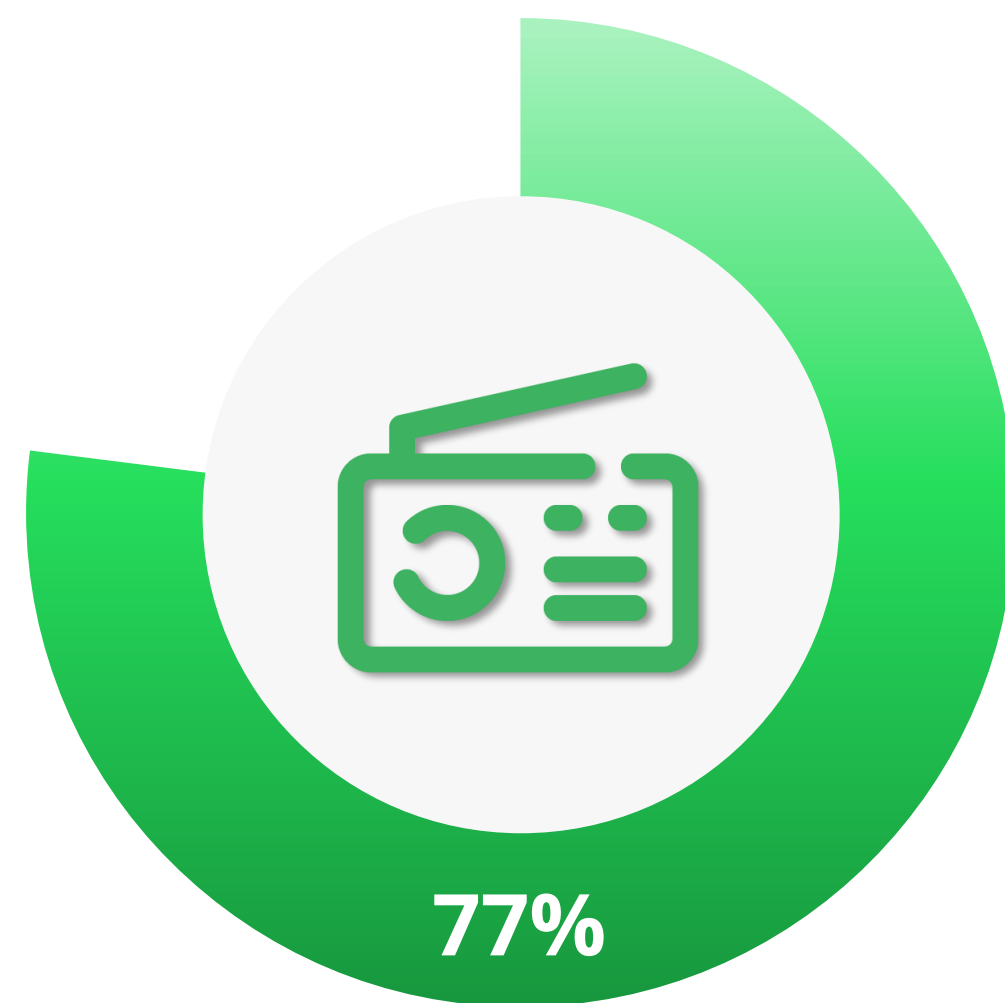
Even those aged 18-34, who we would consider to be more likely to move away from radio have a greater number planning to listen more than less in the next year. All these results are optimistic about Radio's future. While there is more competition for listener's time than ever, there's little suggestion across all this research that Radio risks being left behind.



Radio In-Depth

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

Radio (Both traditional AM/FM, Digital & Online) remains the most listened to audio platform with 77% having listened in the past week. Music Streaming is a close second here, while podcasts reach a smaller portion of the market – not yet as widely used as other audio platforms



Listen To Radio In The Past Week

Radio continues to hold a leading position in the Audio landscape despite the increased competition.



Streamed Music In The Past Week

Music Streaming is 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 not yet widely used however there is a large untapped audience for the medium.

Radio Has Wide Reach Across All Groups, But It's Strongest 35+

Radio is the most listened to Audio medium in the markets surveyed, reaching a majority of audio listeners across every demographic and listening group. However, there is a clear age divide. While the majority of those under 35 are listening to radio, few of them count it as their main source of audio listening. In the 35-54 age bracket Radio has a greater reach and a much higher number using it as their main source of listening. Radio is more of a priority with the older end of the market. With younger listeners, radio does not hold quite the same importance.

	Radio Main Source Of Audio Listening	Radio Listened Past Week	No Radio Listened
Total	45%	77%	23%
18-24 Men & Women	20%	58%	42%
25-34 Men & Women	34%	72%	28%
35-44 Men & Women	51%	83%	17%
45-54 Men & Women	62%	87%	13%
18-54 Men	47%	78%	22%
18-54 Women	43%	76%	24%
Music Streaming Listened Past Week	26%	70%	30%
Podcasts Listened Past Week	26%	74%	26%

Source: In the past week, have you listened to any of the following (Please select as many as apply); What would you say is the main type of Audio you listen to?
N: 4000

Prague & Moscow Are Radio's Strongest Markets, While Radio Usage In Stockholm & Madrid Is Lower Than The Average

Stockholm is Spotify's home market which does explain why that service, and music streaming generally, has an outsize impact compared with other cities surveyed. The strength of Radio in Paris, Berlin & Sydney highlights that radio can be the market leading audio source in developed audio environments. While there are more challengers to Radio than there were previously it's still the leader in Audio listening across most markets.

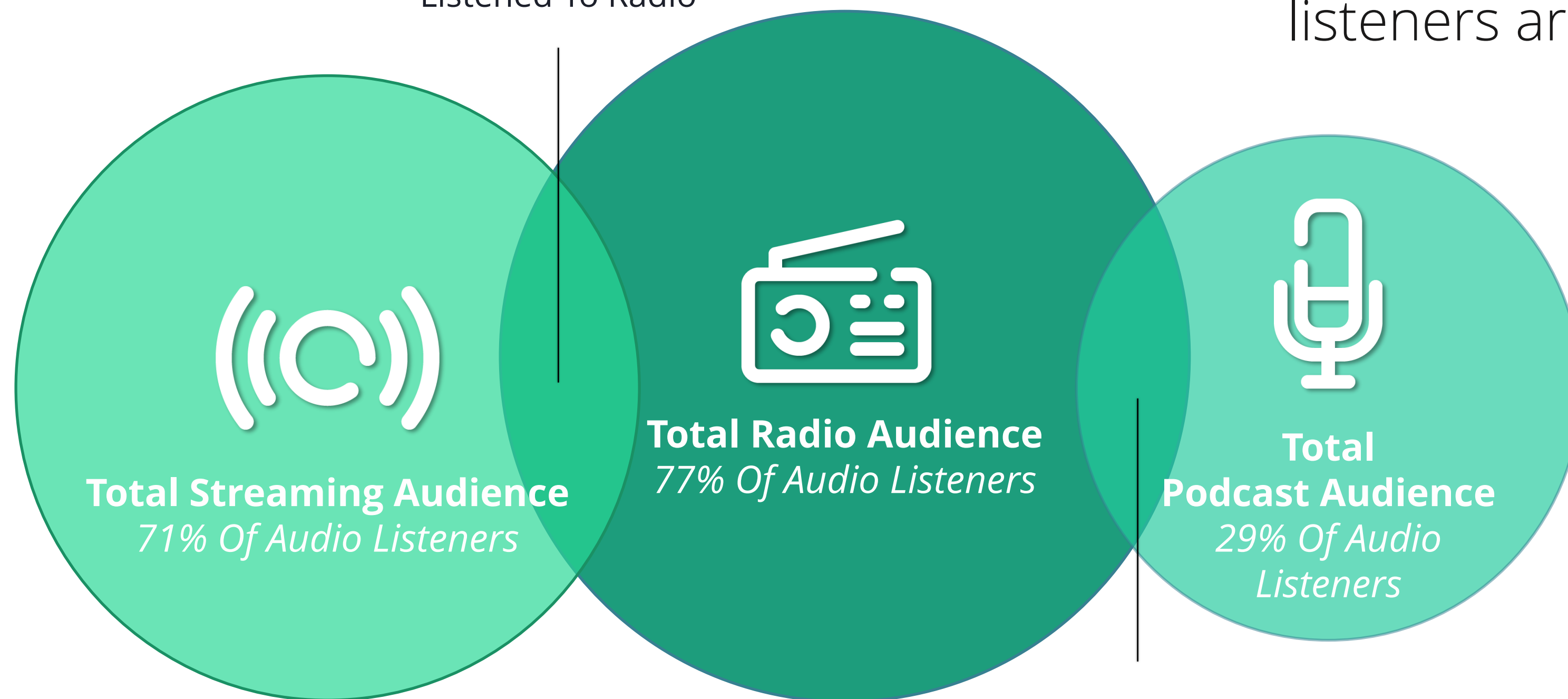
	Radio Main Source Of Audio Listening	Radio Listened Past Week	No Radio Listened
Total	45%	77%	23%
Sydney	47%	79%	21%
London	41%	76%	25%
Paris	54%	80%	20%
Berlin	51%	80%	20%
Moscow	53%	83%	17%
Prague	58%	81%	19%
Madrid	29%	74%	27%
Stockholm	25%	67%	34%

Source: In the past week, have you listened to any of the following (Please select as many as apply); What would you say is the main type of Audio you listen too?
N: 4000

Radio Holds The Highest Number Of Exclusive Listeners In The Audio Environment, With High Overlap With Streaming & Podcasts Listeners

- ▶ **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, while few radio listeners are using podcasts, a vast majority of podcast listeners are listening to radio.

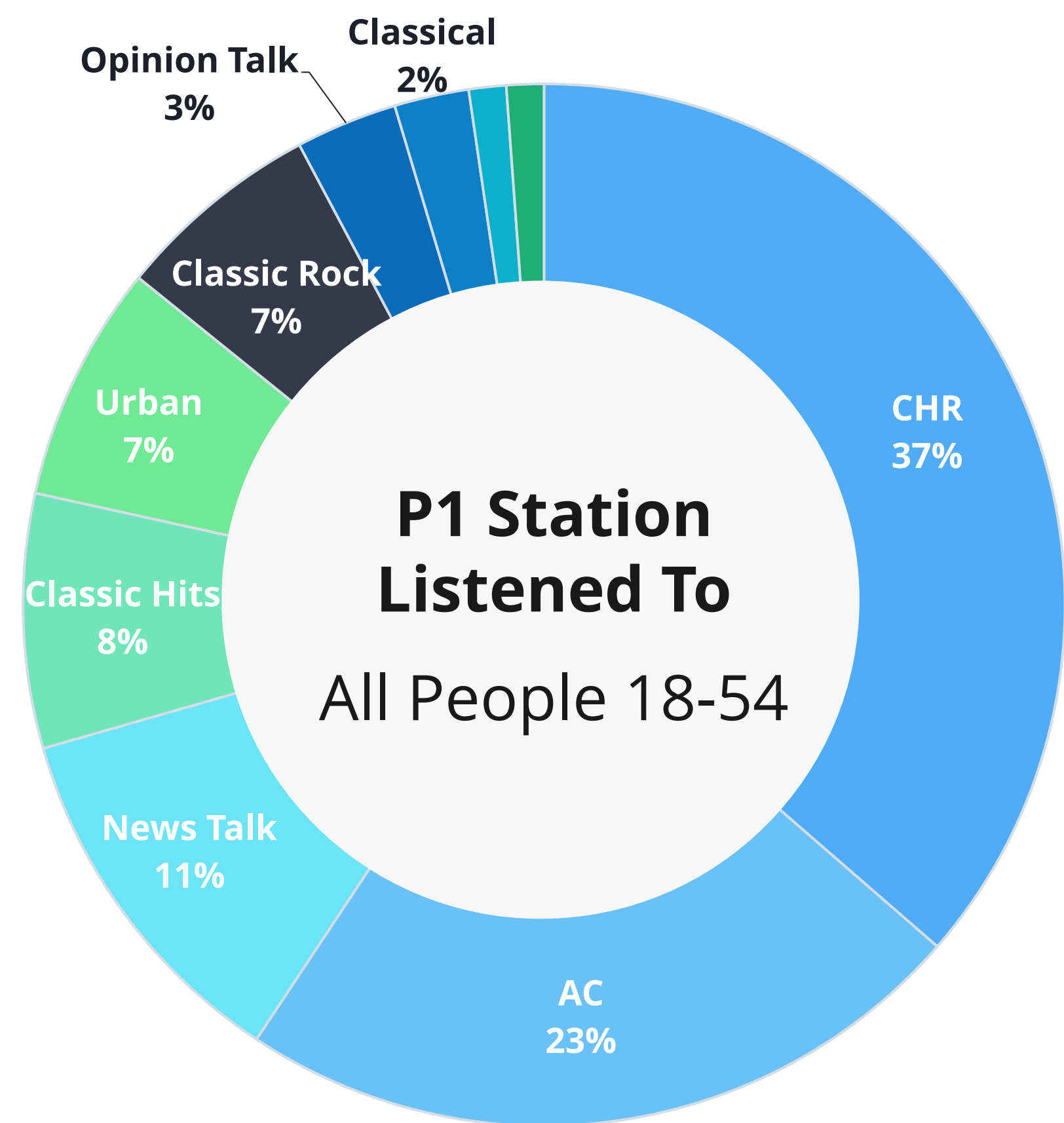


Radio has both the highest proportion of its listeners being exclusive to that platform, and highest number of exclusive audio listeners in total. While streaming is growing, all evidence continues to point to Radio as the dominant player in the Audio space.

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

- ▶ **31%** of Radio Listeners are exclusive to that medium, **24%** of the total audio environment exclusively listening 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.

CHR, Adult Contemporary & News Talk Are The Formats With The Highest Levels Of P1 Listening Across The Surveyed Markets



- CHR
- AC
- News Talk
- Classic Hits
- Urban
- Classic Rock
- Opinion Talk
- Classical Music
- Sports Talk
- Other

CHR's performance as a format comes down to both the strength of individual stations across most markets, & the universality of the format; every market surveyed has at least one or more CHR stations.

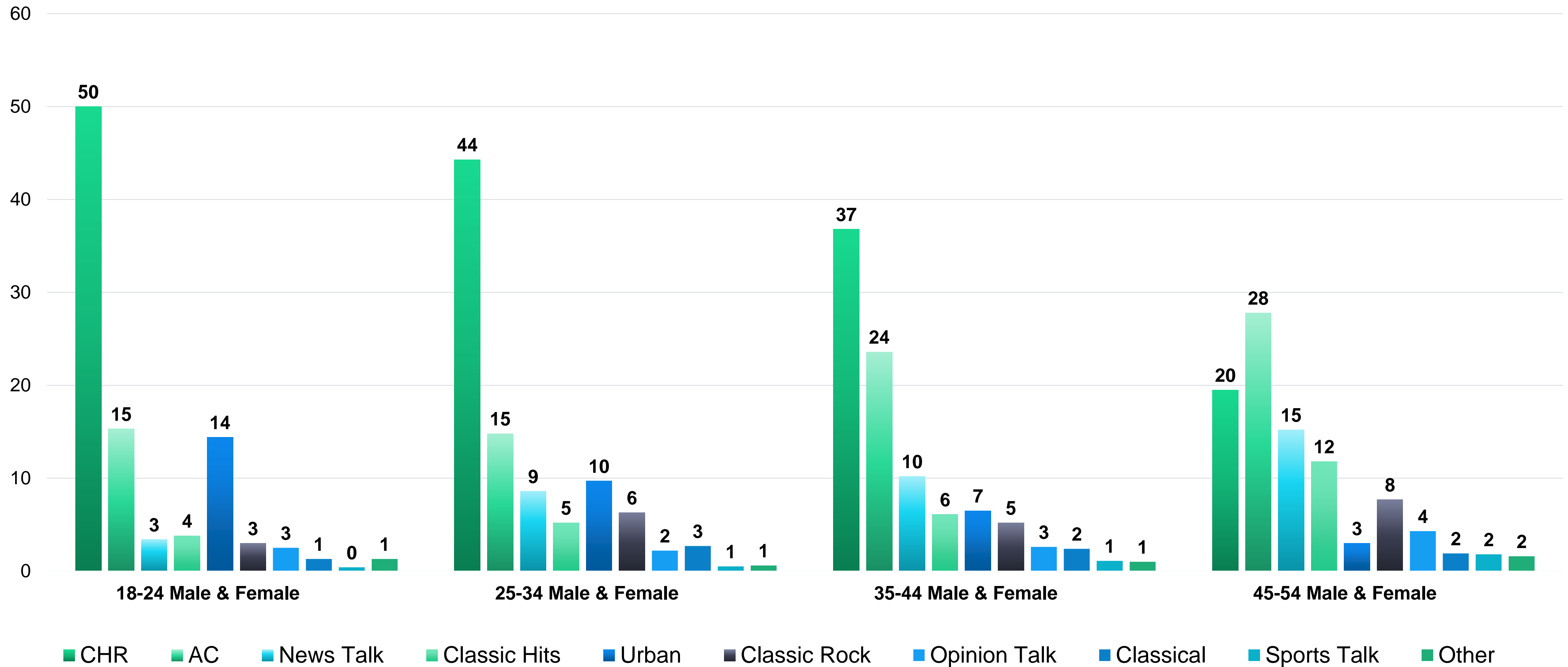
Adult Contemporary & News Talk also perform well at the all market level due to the prevalence of their formats. Of the 8 markets surveyed every city has stations in these formats which result in the higher P1 results seen here.

- ▶ Classic Hits, Urban, & Rock formats make up the 2nd tier here, almost every market surveyed having a station in those formats. However they rarely reach the same heights seen on those top tier formats.
- ▶ Opinion Talk, Classical Music & Sports Talk are more targeted formats, not as wide spread across the markets surveyed nor reaching particularly high P1 results. We note this survey only goes up to age 54, which likely limited the potential for the older targets formats.

Source: Thinking about Radio which station would you say you mainly listen to most: [Stations listed individually for each market but rolled up to broad formats here]: N: 2687

CHR Dominates Radio Listening In The Younger Demos, While AC & News Talk Shares Grow As Listeners Age

P1 Station – By Demographic



Source: Thinking about Radio which station would you say you mainly listen to most: [Stations listed individually for each market but rolled up to broad formats here]
N: 2687

CHR Has The Highest P1 Results Across Almost Every Market, While Moscow Has The Highest Results For Stations Outside Of These Broad Formats

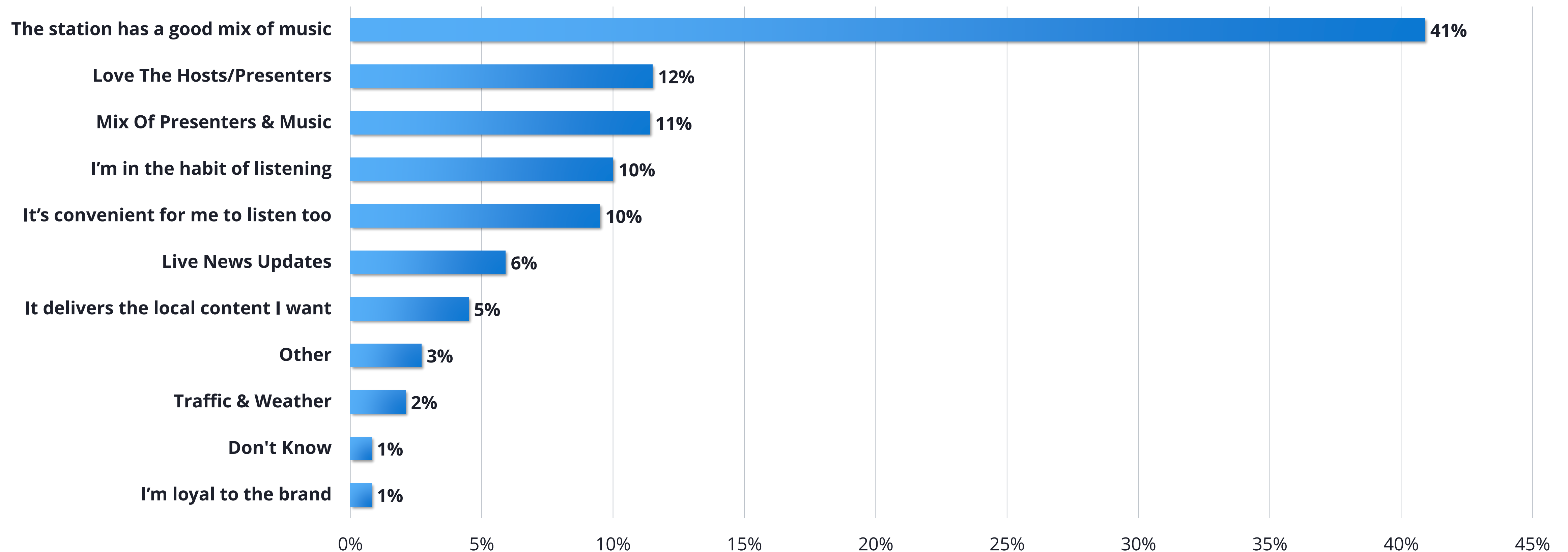
P1 Station Listened To	CHR	AC	News Talk	Classic Hits	Urban	Rock	Opinion Talk	Classical	Sports Talk	Other
Sydney	44	9	9	14	3	11	7	3	N/A	N/A
London	32	27	6	9	9	3	5	6	3	N/A
Paris	31	18	16	5	20	N/A	N/A	4	4	3
Berlin	40	33	2	10	6	5	N/A	3	N/A	2
Moscow	24	15	3	3	8	3	6	1	N/A	37
Madrid	44	18	11	5	5	8	7	1	1	N/A
Prague	25	32	18	11	3	8	N/A	N/A	N/A	4
Stockholm	40	24	21	1	N/A	13	N/A	1	N/A	N/A

Source: Thinking about Radio which station would you say you mainly listen to most: [Stations listed individually for each market but rolled up to broad formats here]
N: 2687

Music Mix & Personalities Are The Main Drivers For Radio

41% of audio listeners say a station's music mix is their main reason to listen to radio. This highlights that despite music streaming providing more choice and control around music, the majority of listeners are still mainly coming to radio for the music and that a strong music offering is key for most station's ongoing success. Presenters, and the combination of Presenters & Music are the next highest on this list, but these results confirm that Radio remains a music driven medium, at least in the eyes of the consumers.

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

Across All Age Groups, Music Mix & Presenters Dominates The Reasons To Listen To Radio

	Good Music Mix	Love The Hosts/ Presenters	Mix Of Presenters & Music	Habit	Convenience	Live News Updates	Local Content	Traffic & Weather	I'm loyal to the brand	Other	Don't Know
TOTAL	41%	12%	11%	10%	10%	6%	5%	2%	1%	3%	1%
18-24 Male & Female	45%	10%	11%	6%	13%	3%	7%	3%	0%	2%	1%
25-34 Male & Female	38%	13%	14%	10%	10%	6%	4%	2%	1%	3%	0%
35-44 Male & Female	42%	12%	10%	11%	8%	6%	5%	1%	1%	4%	1%
45-54 Male & Female	41%	10%	11%	10%	10%	7%	5%	3%	1%	2%	1%
Men	36%	12%	13%	10%	10%	7%	5%	2%	1%	3%	1%
Women	46%	11%	9%	10%	9%	5%	4%	2%	0%	2%	1%

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

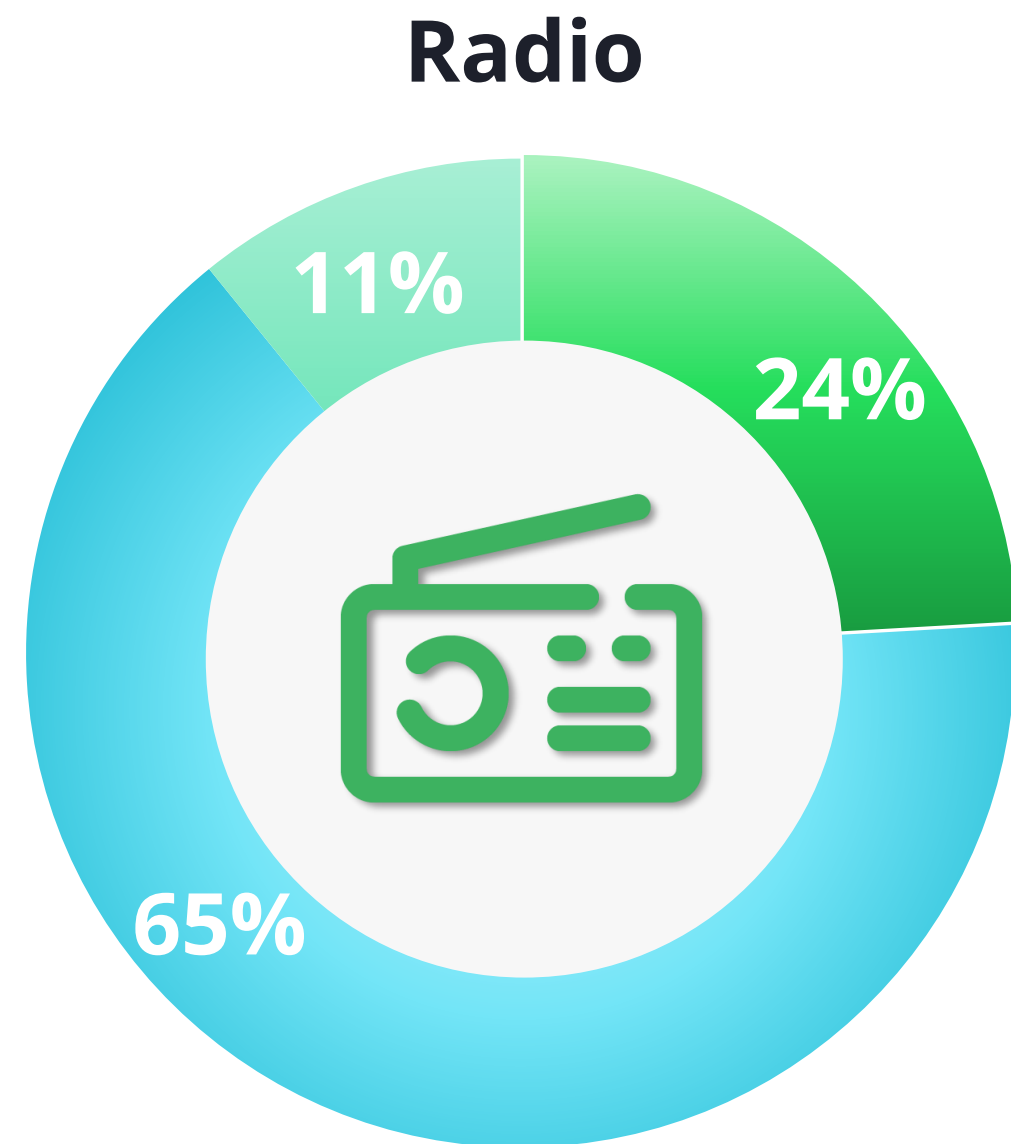
Presenters Are Stronger Drivers To Listen in Sydney & London, While The Music Mix Over Performs In Berlin & Madrid

	Good Music Mix	Love The Hosts/ Presenters	Mix Of Presenters & Music	Habit	Convenience	Live News Updates	Local Content	Traffic & Weather	I'm loyal to the brand	Other	Don't Know
Sydney	38%	17%	10%	7%	10%	5%	6%	2%	2%	1%	3%
London	37%	17%	13%	8%	10%	6%	6%	1%	0%	1%	2%
Paris	42%	15%	9%	13%	6%	8%	3%	1%	2%	1%	3%
Berlin	47%	5%	13%	6%	10%	7%	8%	2%	0%	1%	2%
Moscow	35%	9%	12%	13%	15%	4%	3%	5%	1%	2%	3%
Prague	38%	9%	18%	13%	10%	2%	2%	4%	1%	0%	4%
Madrid	50%	6%	9%	15%	6%	7%	6%	1%	0%	1%	1%
Stockholm	43%	15%	7%	4%	9%	10%	2%	3%	0%	1%	5%

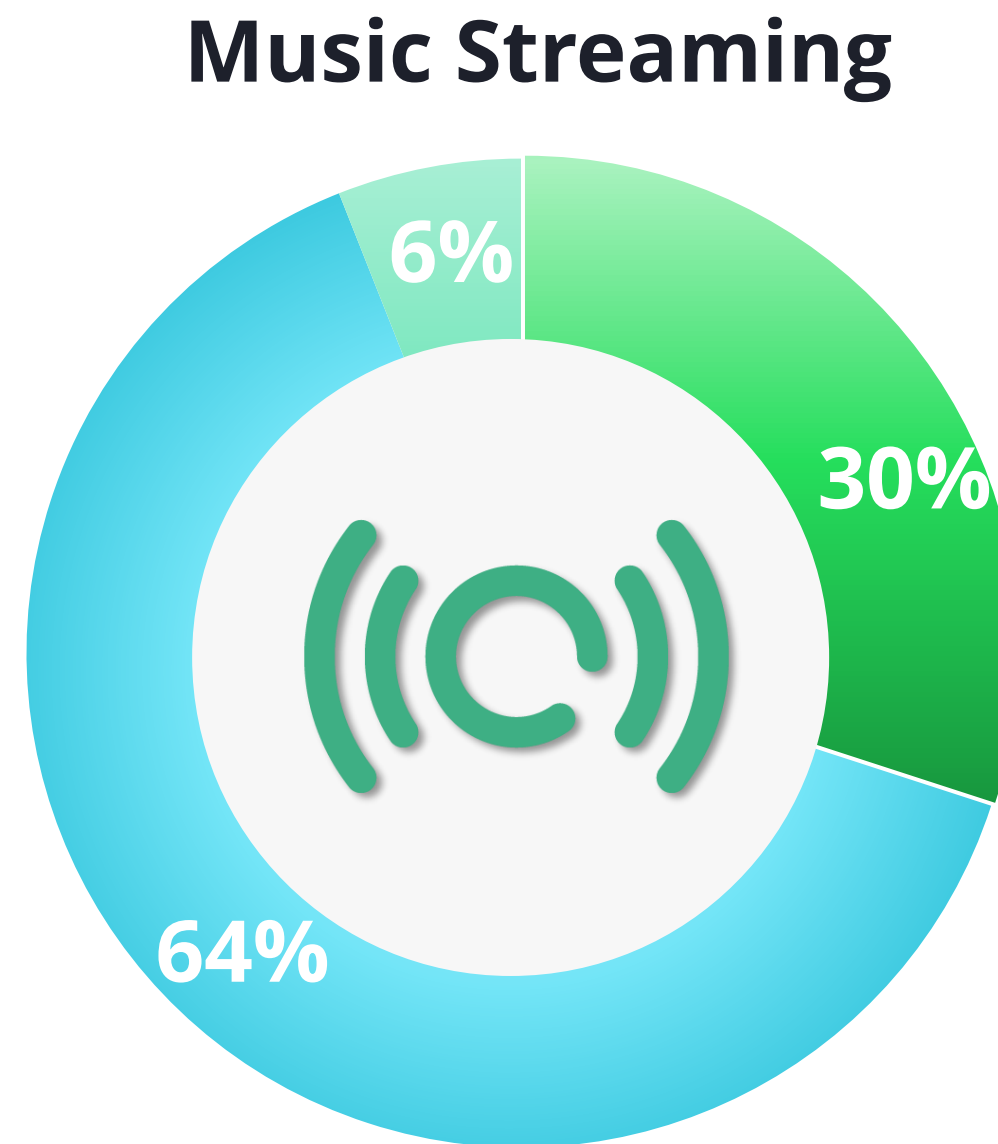
Source: Thinking about radio, what is the main reason you choose to listen:
N: 2687

Most Radio Listeners Plan On Listening To Radio At About The Same Level Or More Next Year, With Few Saying They'll Listen Less

Will You Be Listening to More or Less of Radio, Music Streaming & Podcasting in the Next Year:



■ Listen More ■ About The Same
■ Listen Less



■ Listen More ■ About The Same
■ Listen Less

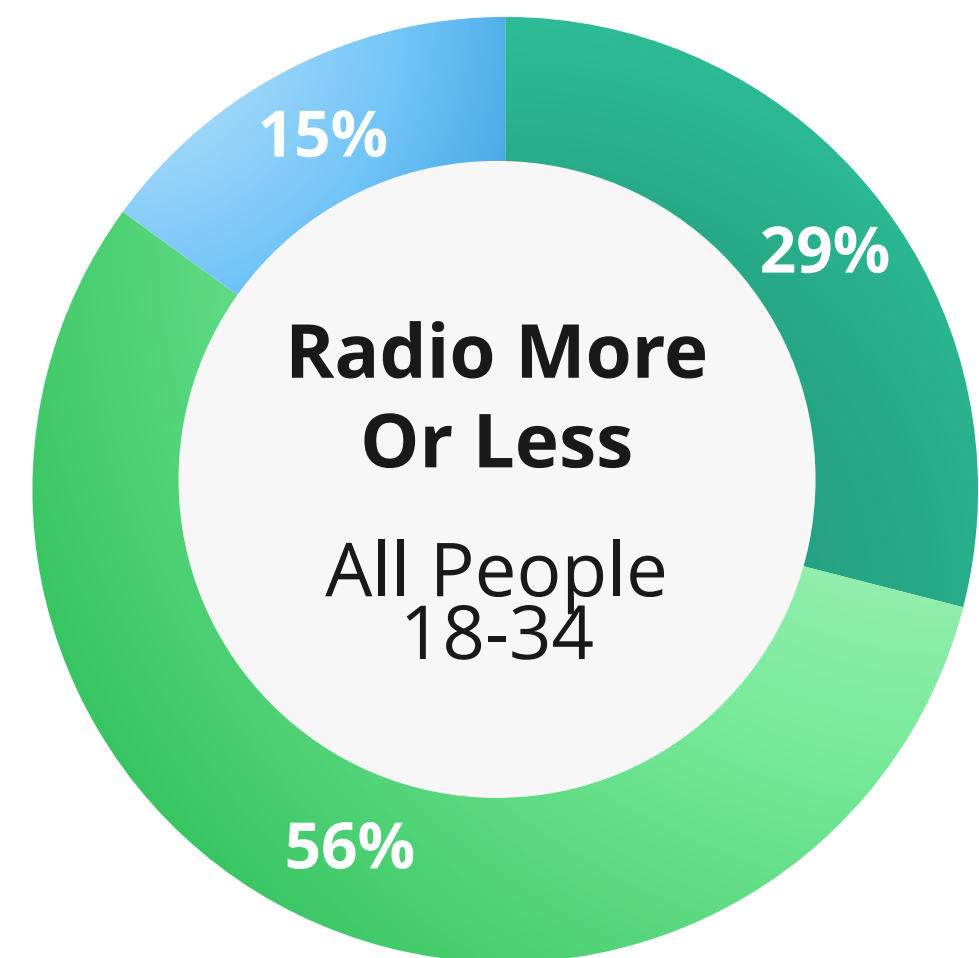


■ Listen More ■ About The Same
■ Listen Less

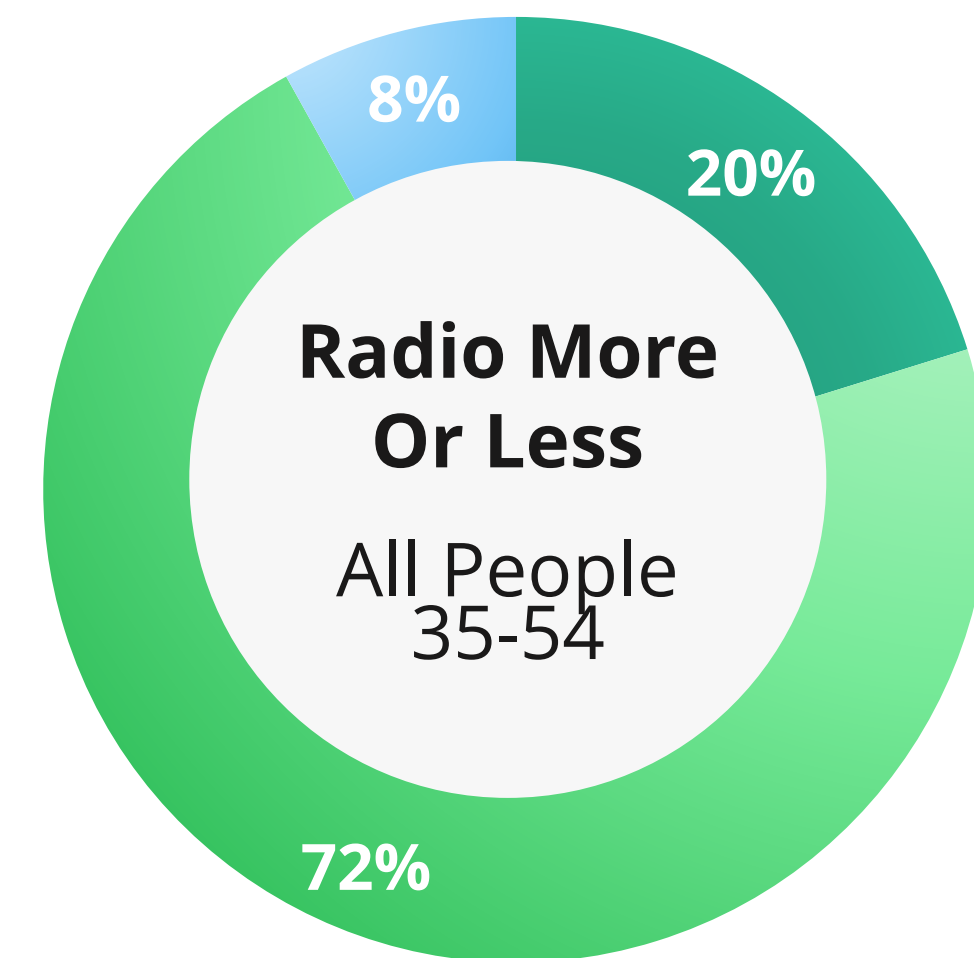
The results for Radio & Podcasting look nearly identical, highlighting that while there are new mediums entering into the audio space we're not seeing Radio becoming less important. It's a more competitive environment than it once was, but these results highlight the Radio audience remains committed to the medium, as long as there is compelling product on offer they'll continue to listen.

All Groups Plan To Be Listening To More Radio In The Next Year

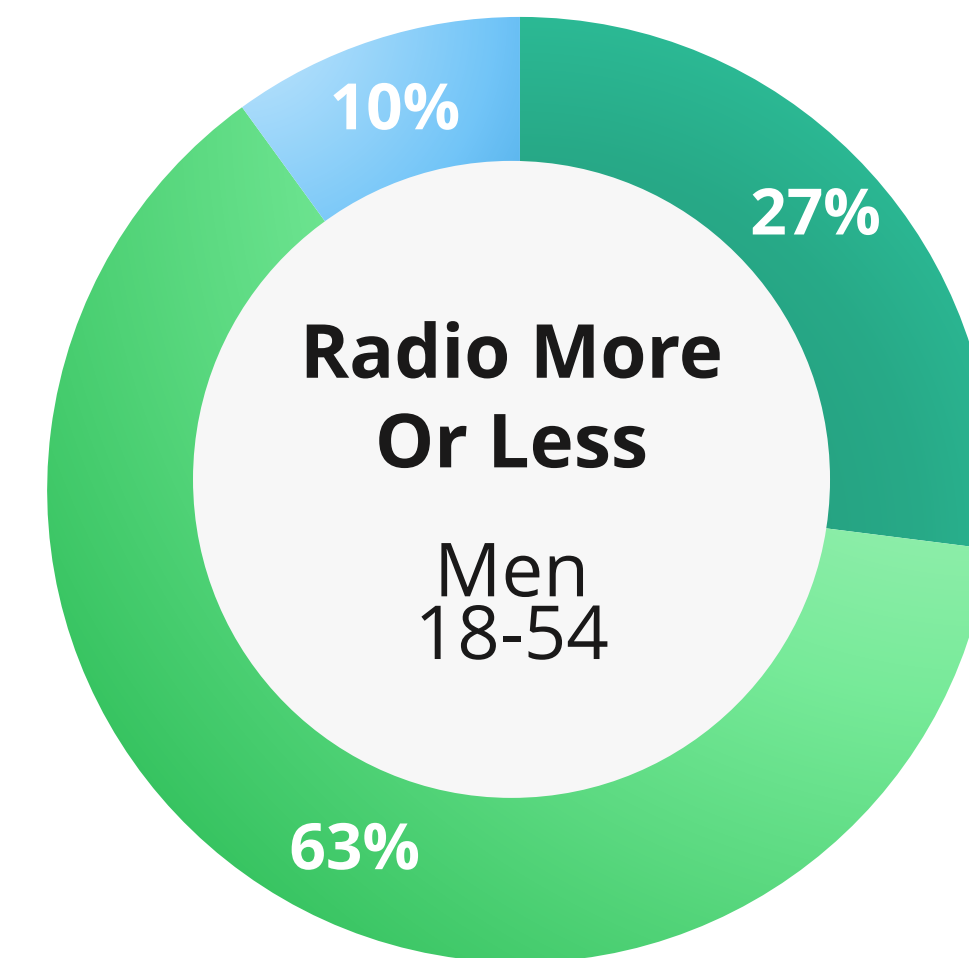
Will You Be Listening to More or Less Radio in the Next Year:



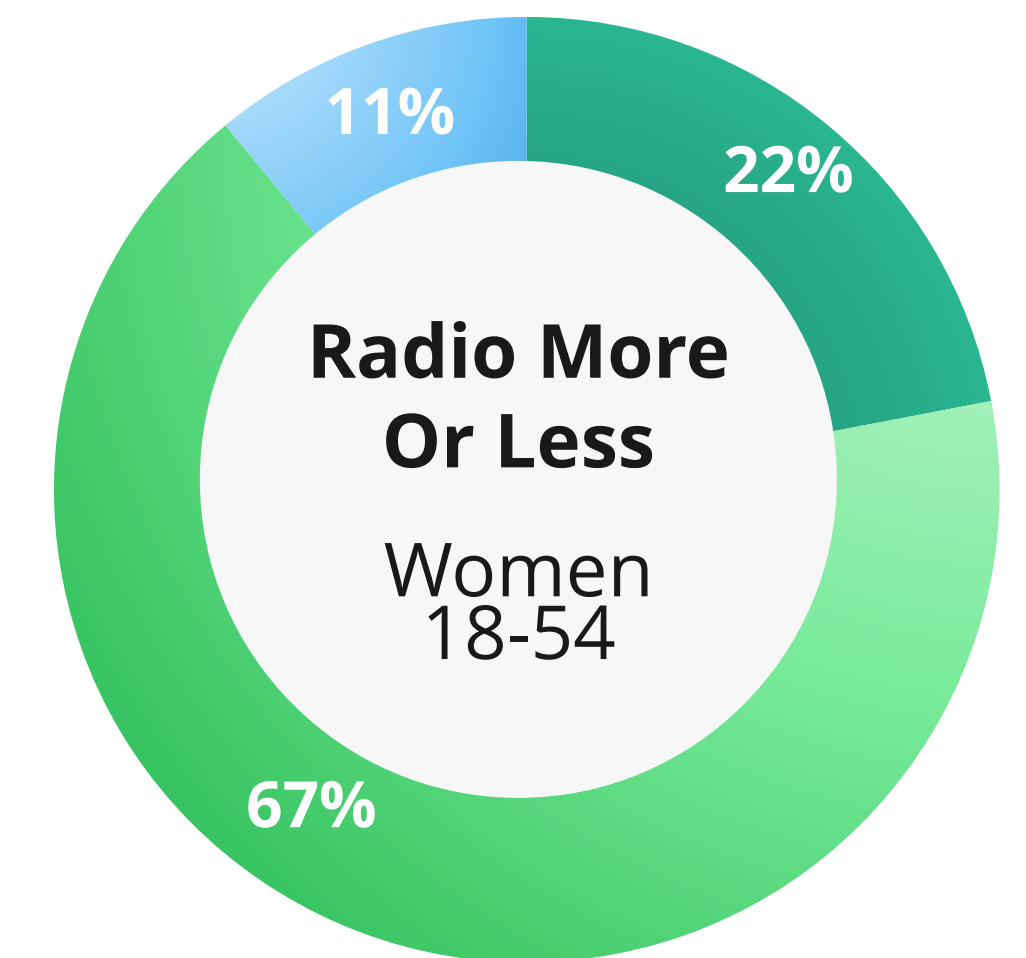
■ Listen More ■ About The Same
■ Listen Less



■ Listen More ■ About The Same
■ Listen Less



■ Listen More ■ About The Same
■ Listen Less

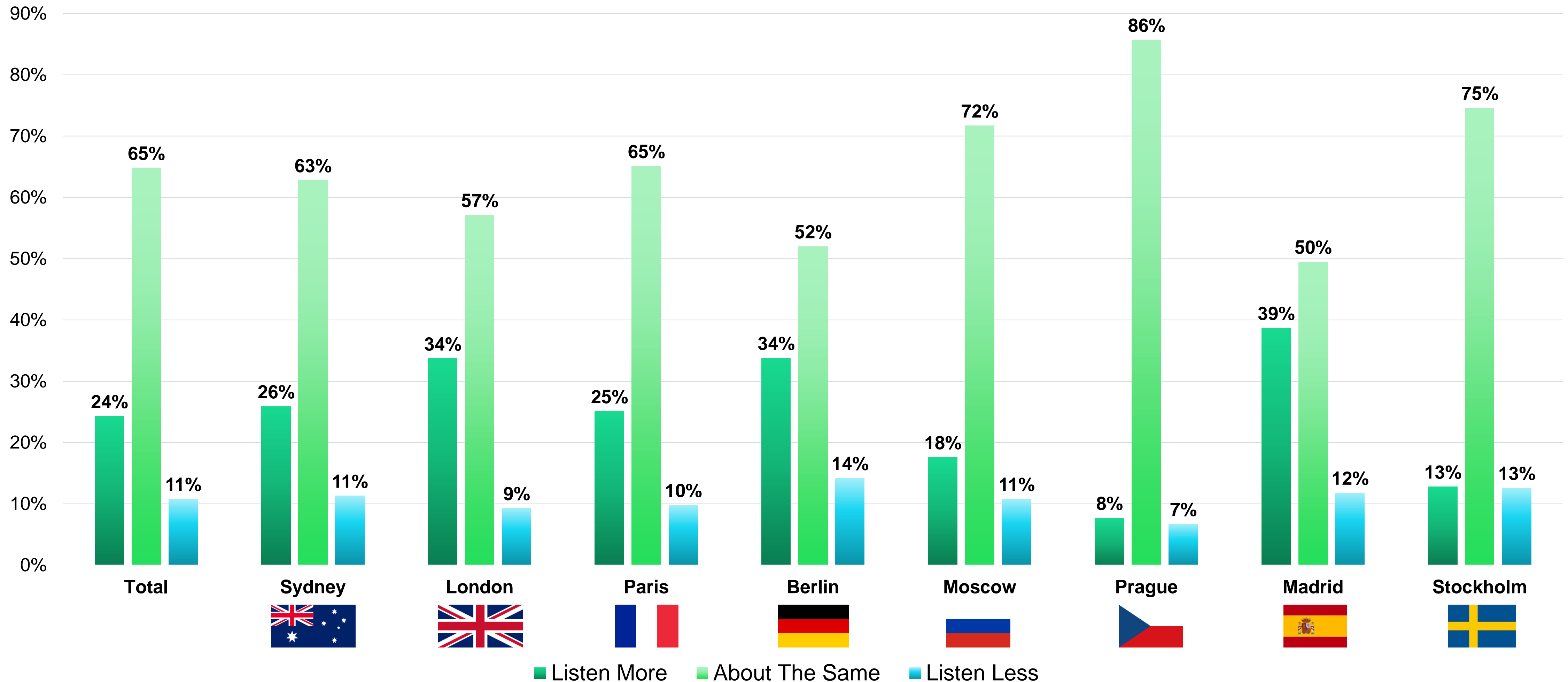


■ Listen More ■ About The Same
■ Listen Less

We see higher rates of both Listen More & Listen Less for Radio amongst those aged 18-34 compared to those 35-54, the listening habits in the younger end aren't as settled as they are with older respondents. With Listen More results nearly double Listen Less among 18-34 year olds, radio is still strong. Despite this group having high interest in other audio formats, Radio maintains a strong connection with younger listeners and the medium isn't fading in this demographic.

London, Berlin & Madrid Have The Highest 'Listen More' Results, While Stockholm is The Only Market Where 'Listen More' & 'Listen Less' Are Equalized

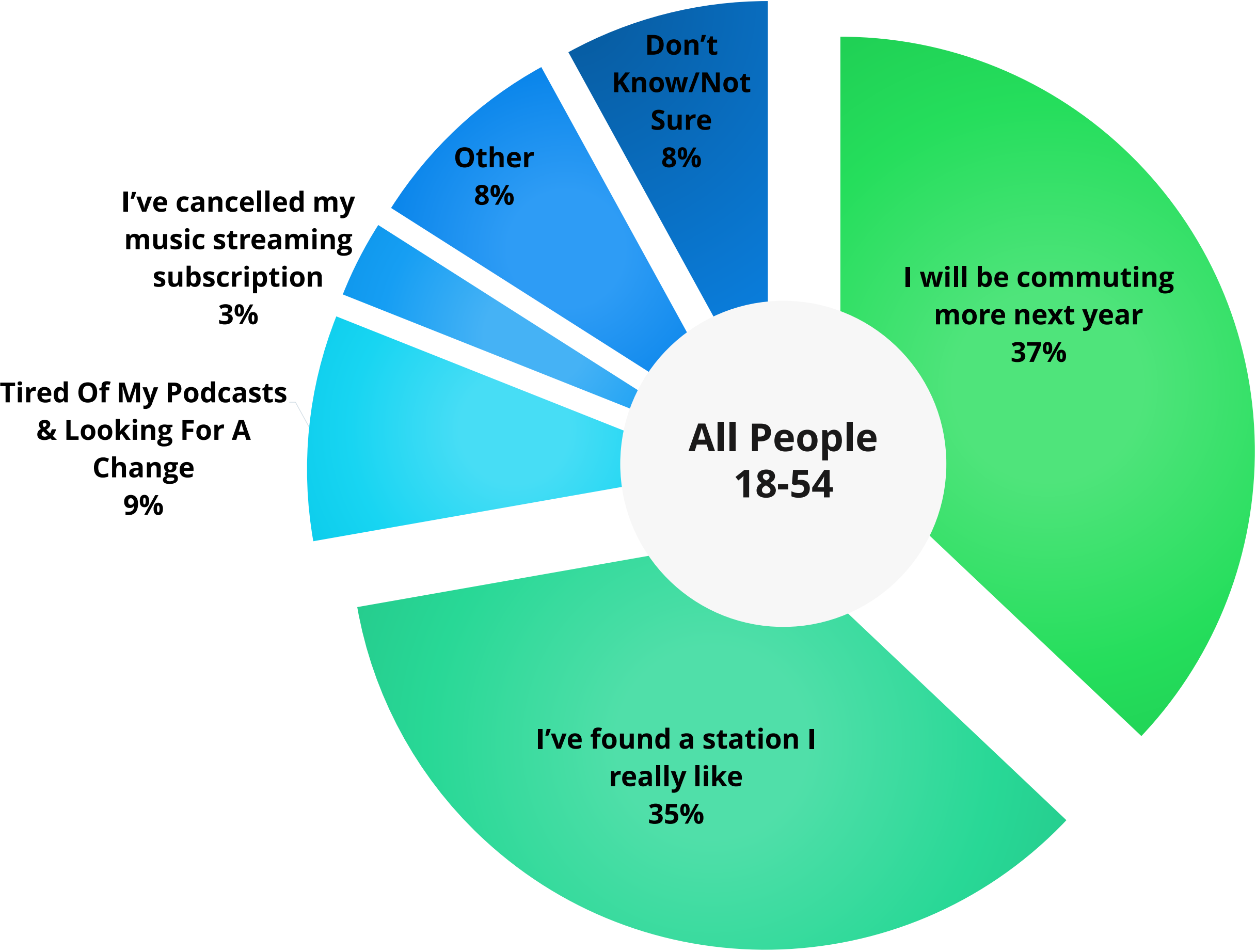
Radio Listening More or Less Next Year – By Country



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

Increased Commuting & Finding A New Station Are The Main Reasons To Be Listening More Next Year

Why Do You Feel You'll Be Listening To More Radio Over The Next Year



Few listeners feel they'll be listening more due to less time spent with either podcasting or music streaming.

The large percentage Listening More due to their time spent commuting may reflect audio listeners emerging from the post pandemic and lockdown lifestyle. Returning to their typical lifestyle potentially creating more opportunities for time spent with Radio compared to the past 2 years.

Source: Why do you feel you'll be listening to more radio over the next year: N: 977

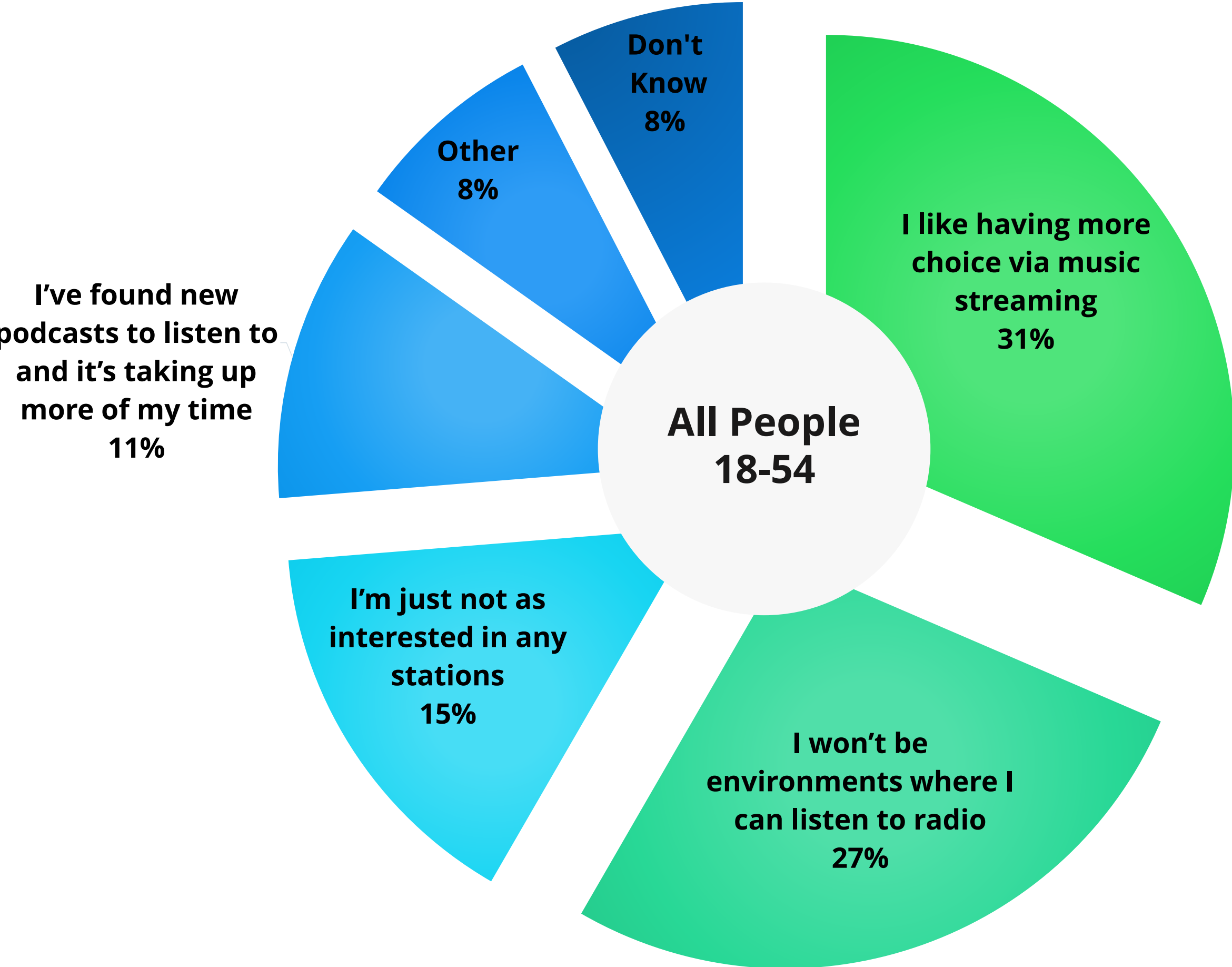
For Those Listening Less, Music Streaming And A Change Of Environment Are Driving The Shift In Behaviour

These results highlight that Music Streaming has a 'pull factor for some radio listeners, the choice and control on those services a reason to switch.

▶ With only 11% of those planning on listening less due to Podcasts it does highlight that medium isn't as pressing a threat to Radio. Across the wider All Audio study we've continued to see audio consumers using podcasts as a complimentary medium, its part of their media diet but rarely the priority.

▶ The high outcome for a change in environment also highlights that what is forcing some away from radio is partially outside of Radio's control. New technologies however do mean radio can be more accessible on more platforms than ever before – Radio must meet consumers where they are.

Why Do You Feel You'll Be Listening To Less Radio Over The Next Year

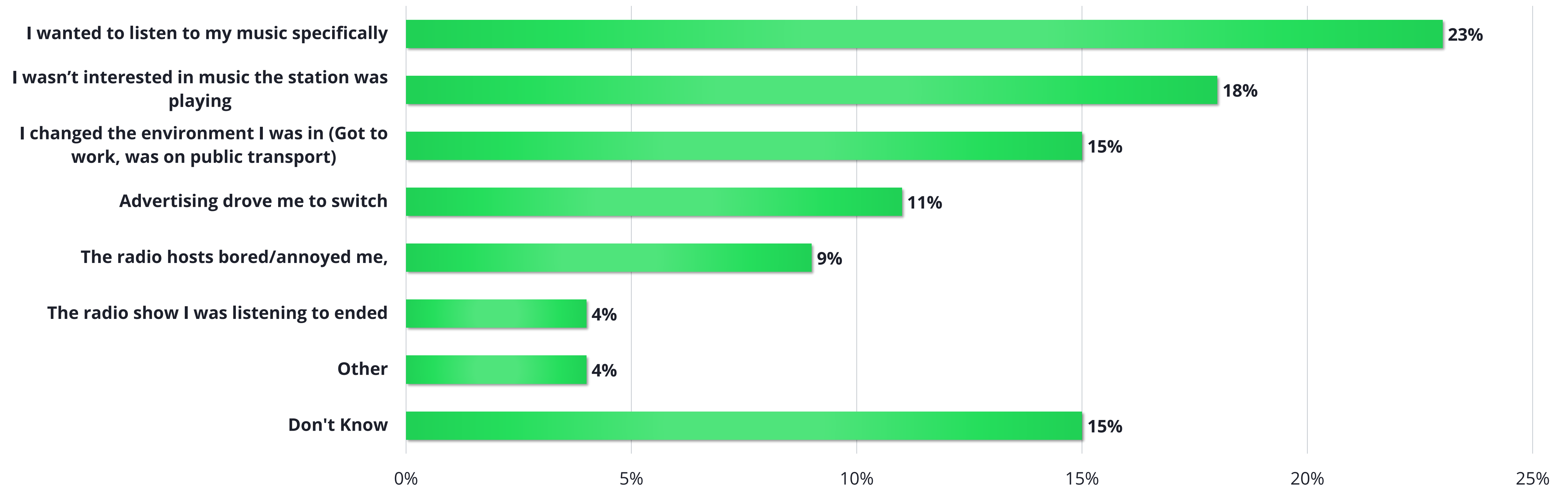


Source: Why do you feel you'll be listening to less radio over the next year: N: 428

The Reason Radio Listeners Switch To Music Streaming Are Complex, With No One Cause Driving That Change

Listeners seeking out their own music specifically was the leading reason to switch from radio to music streaming, with nearly a quarter of respondents saying that drove their choice, and a further 18% said they switched when the music on a station didn't satisfy them. Hosts, meanwhile, are much further down the list, music more so than anything else looking to be the key driver in the audio space. Advertising also fairly low on this list.

If you switch from radio to streaming music during the day, what is it that drives the switch:



Source: If you switch from radio to streaming music, what is it that drives the switch: :
N: 4000

Across Every Demographic We See Near Uniform Results, There Isn't Significant Divergence In What Drives Radio Listeners To Streaming

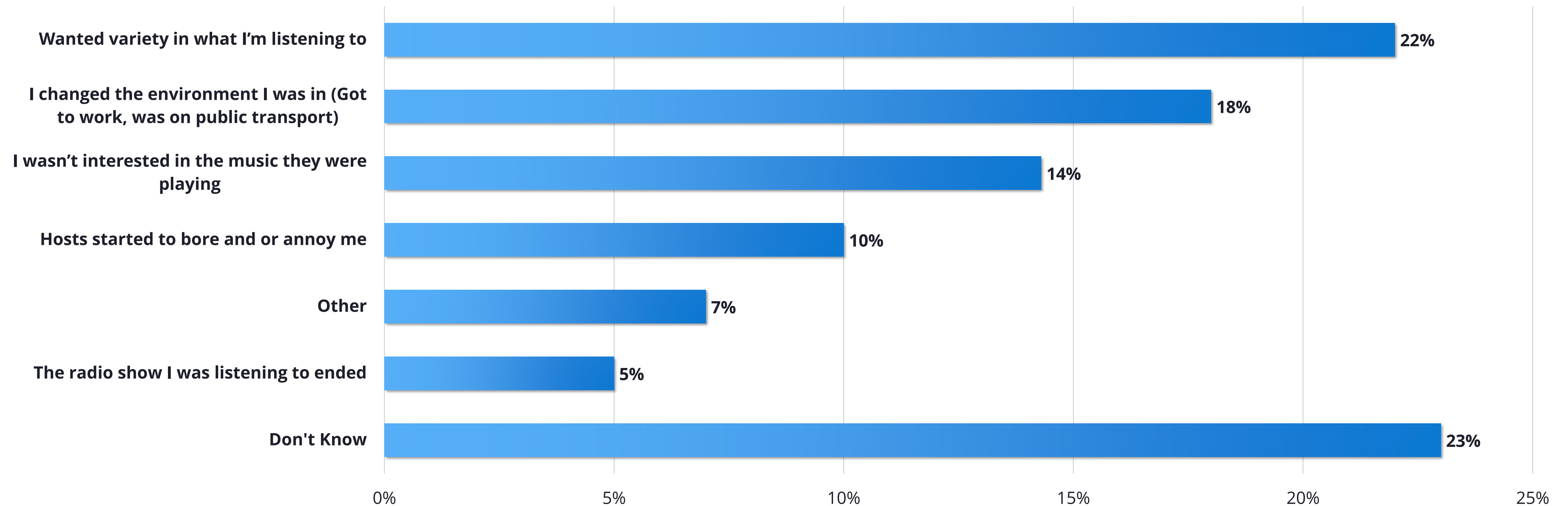
If you switch from radio to streaming music during the day, what is it that drives the switch:	I wanted to listen to my music specifically	I wasn't interested in music the station was playing	I changed the environment I was in	The radio hosts bored/annoyed me	Advertising drove me to switch	The radio show I was listening to ended	Other	Don't Know
TOTAL	23	18	15	9	11	4	4	15
18-24 Male & Female	23	21	18	10	13	2	4	9
25-34 Male & Female	23	20	16	10	13	3	2	12
35-44 Male & Female	24	19	15	10	10	4	4	16
45-54 Male & Female	24	15	14	7	11	4	7	19
Men	23	17	15	10	12	4	4	15
Women	23	20	16	8	11	3	4	14

Source: If you switch from radio to streaming music, what is it that drives the switch: :
N: 4000

The Reasons For Switching From Radio To Podcasts Are Similarly Complex

Radio listeners want variety in what they are listening to. A change in environment and being uninterested in the music mix are also among the top choices. The Don't Know result for this question is very high, meaning that for many audio listeners there isn't a clear, conscious reason that drives them to make the switch – the dynamics at work incredibly complex and many of those switching to podcasts aren't aware of their reasons for doing so.

If you switch from radio to podcasts during the day, what is it that drives the switch:



Source: If you switch from radio to Podcasts, what is it that drives the switch: :
N: 4000

18-34 Year Olds Have Much Lower Don't Know Results Than Those 35+

This corresponded in higher results for the change in environment, uninterested in the music mix & annoyed by host answers in the younger demographics. It does suggest that some of the younger listeners may be more aware of their behaviour and why their making the media choices that they are compared to those 35-54.

If you switch from radio to podcasts during the day, what is it that drives the switch	Wanted variety in what I'm listening to	I changed the environment I was in	I wasn't interested in the music they were playing	Hosts started to bore and or annoy me	The radio show I was listening to ended	Other	Don't Know
TOTAL	22	18	14	10	5	7	23
18-24 Male & Female	19	22	18	13	5	5	18
25-34 Male & Female	21	20	15	13	6	6	19
35-44 Male & Female	24	17	15	9	6	7	23
45-54 Male & Female	22	14	11	8	5	10	30
Men	21	16	14	12	7	7	24
Women	23	19	15	9	4	8	23

Source: If you switch from radio to Podcasts, what is it that drives the switch: :
N: 4000

Ease Of Listening And The Convenience Of Radio Is What Keeps Listeners Coming Back

When asked what brings them back to listening to radio after switching away earlier in the day **20%** of respondents said it was because radio was *'Easy To Listen To'*, while a further **20%** said it was due to the convenience of listening when commuting in their cars.

16% said they switch back due to liking the stations music mix, while just **10%** said it's the hosts specifically that bring them back. A further **8%** said it was habit. The ease of use of Radio is what's driving listeners back to the medium, but they wouldn't be sticking around if the product itself wasn't compelling.

Most encouragingly for radio is just **14%** of the medium's listeners say they don't switch back later in the day after shifting to another audio format. Despite increased competition for its audience ears Radio remains an incredibly sticky medium.

Where Does This Leave Radio?

Despite the audio environment being more competitive than at any time in the past these results highlight that Radio remains in a healthy position, the audience remains engaged and committed and there's little evidence to suggest **accelerating change (Not sure we can say that)**. However the study does make clear some of the key considerations for radio in this changing environment.

- **Music Remains King**

Radio is still seen by its listeners as a music driven medium. While Spotify and the other streamers do offer audio consumers more choice, Radio is still the easier to use platform and has strength in its ability to curate music for its listeners. The fact that we haven't seen Radio's music identity damaged despite competition from streaming highlights how important music remains is to the medium. It must be the focus for all music driven formats as it's still the main reason many choose to listen to radio.

- **Radio Has To Meet Listeners Where They Are**

One of the biggest reasons to switch away from radio across all the research was a change in environment, respondents listening to radio when they're commuting but switching away to another audio source once they arrive in their office. This highlights the need for radio to be as accessible as possible and to meet its consumers where they are. Whether that means having a strong, easy to use streaming interface, or making sure there's additional brand touch points available on Podcasting Apps and across Social Media. The key is being accessible and top of mind for potential listeners in every available platform.

- **Localism Remains A Strength For Radio**

With streaming offering strong competition to radio for music, Radio does need to focus on its unique selling points. While presenters and local news, traffic and weather weren't top reasons to listen to radio, they are still seen as important by those listening and in an increasingly globalized media environment Radio has the opportunity to become the 'local voice' in a way that none of its competitors can be.