

BPR Audio Uncovered - 2022

Global Audio Listenership in 2022



Broadcast Programming & Research

BPR - All Audio Perspective

Audio listening has changed dramatically over the past decade, with an expansion in platforms offering listeners new ways to spend their time. Where once traditional broadcast radio ruled, digital, online radio, music streaming and podcasting have all seen significant growth in recent years and changed much of the conventional wisdom that previously governed the priorities of Audio content creators.

Despite the expansion in new audio offerings, there has been very little research publicly available into the wider Audio Landscape. BPR, in conjunction with CINT, have conducted this **All Audio** Study to help bring some clarity and perspective on consumer use and content creators.

In all, 4500 respondents in 9 international markets participated making this **All Audio** Study one of the most in-depth looks into ways consumers interact with Audio. This study looks beyond topline listening behaviors to see what drives interactions and relationships between available audio choice.



Sample details

4500 surveys were conducted in the period **9th-18th September 2022**. The basis of the survey was males & females aged 18-54, demographically weighted to each market.

All respondents must have listened to some form of audio in the past week.

To build a global perspective, 500 respondents from 9 international cities were chosen, Trends in audio listening across these mainly Western European the US and Australia cities were analysed and compared, with the results of all 9 market averaged as the total basis in this report.

Respondent cities:

- London, United Kingdom
- Berlin, Germany
- Paris, France
- Prague, Czech Republic
- Stockholm, Sweden
- Madrid, Spain
- Sydney, Australia
- Los Angeles, USA
- New York, USA

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.

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

Radio continues to have the widest reach of any audio platform in the market, however its engagement with listeners is lower than other formats. Radio still well in the fight here, but it's becoming an increasingly competitive audio marketplace and we are seeing signs that Radio doesn't always dominate Music Streaming or Podcasting.

- **Music Streaming now has the highest share of time listened of all audio platforms**

Music Streaming reach remains behind radio, but where it excels is in strong TSL, its listeners spending more time with the platform than any other audio medium. We see vastly different results in Streaming's penetration across the markets, streaming is dominant in New York and LA, but has much lower uptake across many of the European cities

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

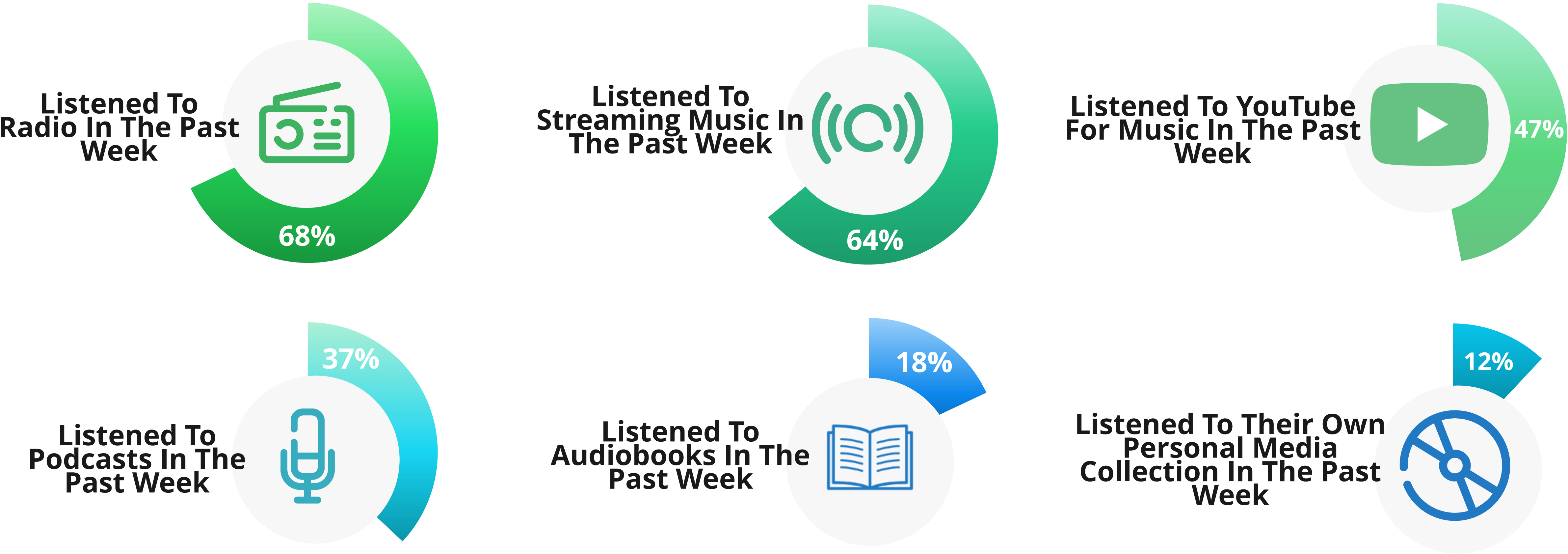
With 37% of those surveyed listening to podcasts, it remains more niche than either Streaming or Radio, although it is steadily growing. We continue see very few podcast listeners viewing it as their main audio medium, especially compared to Radio & Streaming listeners. Podcasts are still seen as something to supplement audio listening, rather than being the top choice in its own right.



Key Listening Results

Radio Attracts The Largest Audience, But Music Streaming Is Close Behind

Radio, including AM/FM, Digital & Online, remains the most listened to audio platform with **68%** of audio listeners having tuned in in the past week. Music Streaming is a close second here. Podcasts meanwhile continue to carve out their own niche, they are not used by a majority of the market but there is a clear audience for the this format.




Source: In the past week, have you listened to any of the following (Please select as many as apply):
N: 4500

25-34 Men & Women n=1414

63% Listened To Radio 

72% Streamed Music 

46% Listened To Podcasts 

49% Listened To YouTube For Music 

21% Listened To Audiobooks 

10% Listened To Their Owned Media 

35-44 Men & Women n=1399

74% Listened To Radio 

65% Streamed Music 

38% Listened To Podcasts 

48% Listened To YouTube For Music 

19% Listened To Audiobooks 

12% Listened To Their Owned Media 

18-24 Men & Women n=598

53% Listened To Radio 

69% Streamed Music 

37% Listened To Podcasts 

49% Listened To YouTube For Music 

15% Listened To Audiobooks 


8% Listened To Their Owned Media 

45-54 Men & Women n=1089

76% Listened To Radio 

53% Streamed Music 

28% Listened To Podcasts 

42% Listened To YouTube For Music 

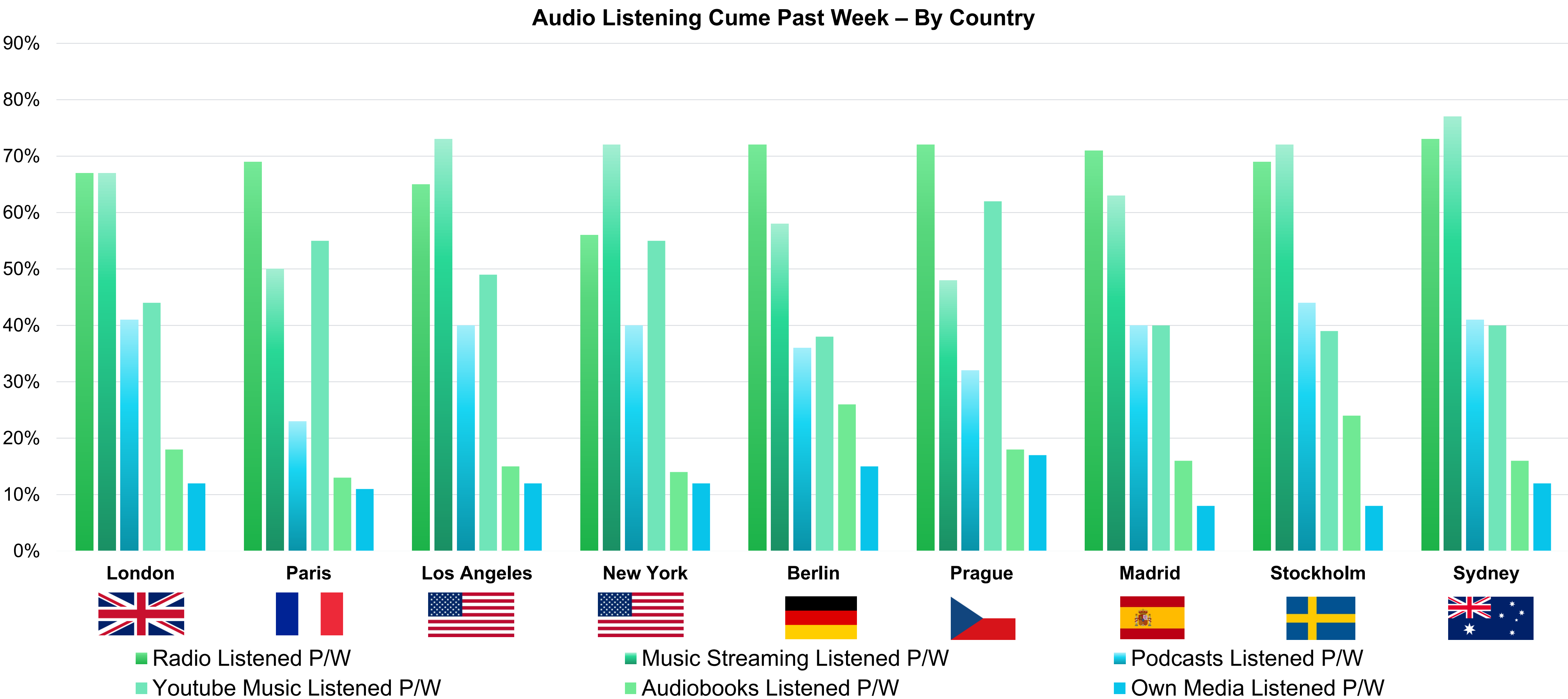
15% Listened To Audiobooks 

17% Listened To Their Owned Media 

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

Music Streaming Use Varies Across Markets

The use of music streaming services is ahead of radio in Sydney, Stockholm & the US, while lower in other cities, each market shows quite different levels of use. Podcast listening is also varied, with much higher use in the English speaking markets of London, Los Angeles, New York & Sydney. The language barrier potentially leading to less available product in the non-English speaking markets, and thus lower podcast uptake.



Source: In the past week, have you listened to any of the following (Please select as many as apply):
N: 4500

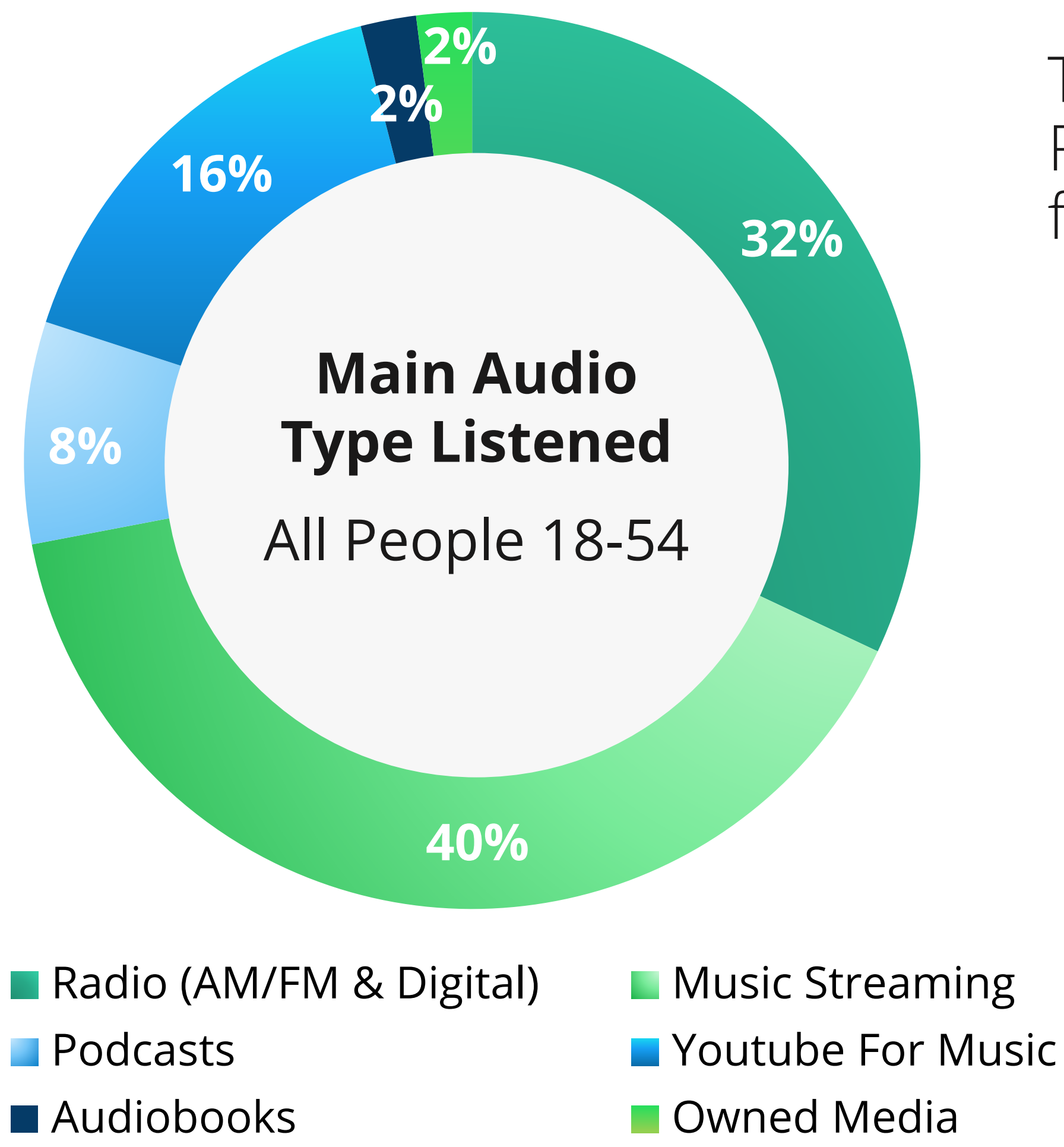
Radio Is Generally Most Listened but co-exists with Streaming and Podcast

Berlin, Madrid, Paris and Prague have the highest results for radio and the lowest for music streaming. Los Angeles, New York & Stockholm all have higher usage for music streaming than other cities tested. Sydney is the exception, having both the highest music streaming, Radio and podcast listening of any market. Sydney does highlight that all three audio mediums don't necessarily cancel one another out. Just because streaming is rising doesn't mean Radio's overall reach will be threatened.

In the past week, have you listened to any of the following (Please select as many as apply):	Any Radio	Music Streaming	Podcasts
Total	68%	64%	38%
London	67%	67%	41%
Paris	69%	50%	23%
Los Angeles	65%	73%	41%
New York	56%	72%	40%
Berlin	73%	58%	36%
Madrid	71%	63%	40%
Prague	72%	48%	32%
Stockholm	69%	72%	45%
Sydney	73%	77%	41%

Source: In the past week, have you listened to any of the following (Please select as many as apply):
N: 4500

Radio Has A Higher Total Audience, But More People See Streaming As Their Main Audio Type



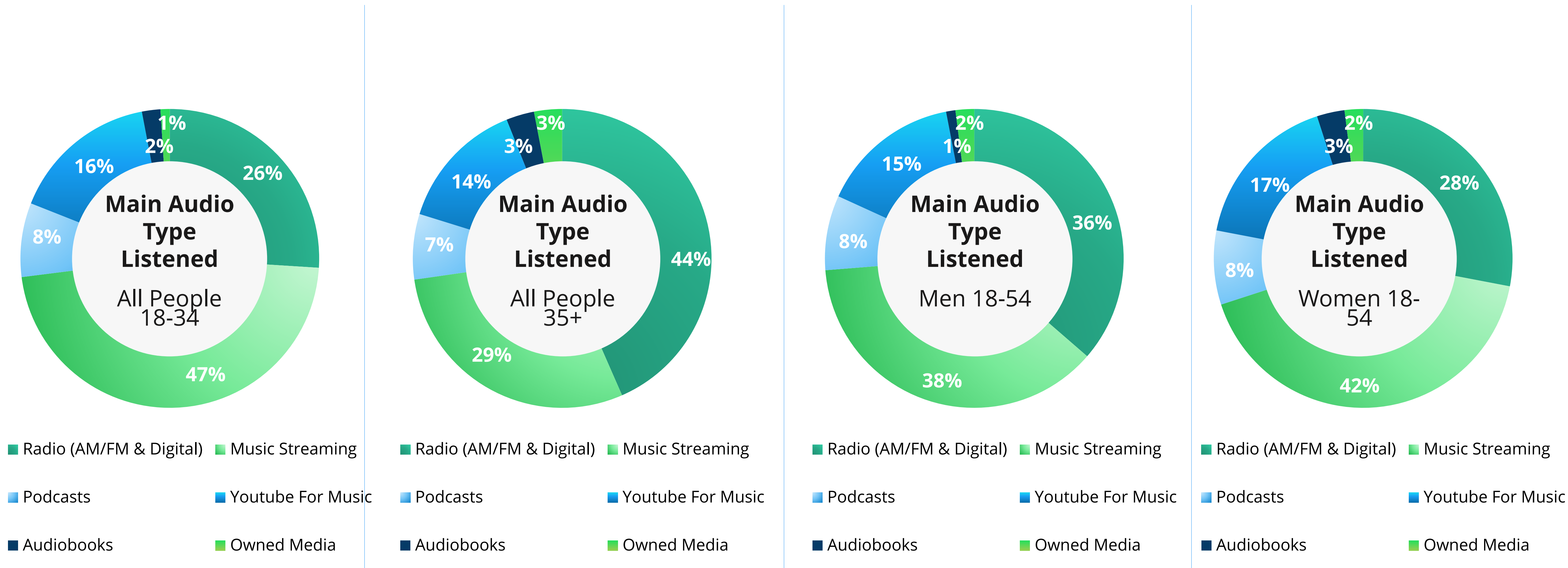
There are shifting allegiances within the audio choices, Radio has a broader reach, but music streaming is the first choice overall.

Only 8% name podcast as their main audio type. Podcasts are still seen as an ancillary medium even amongst it's users, something to supplement their radio & streaming listening rather than being the main attraction.

- ▶ **47%** of radio listeners said Radio was their main source of Audio, **34%** nominate Music Streaming, **12%** YouTube & **5%** for Podcast.
- ▶ 62% of Music Streaming listeners, **nominate** Streaming as their main audio source, **15%** named Radio, with **10%** YouTube & **7%** for Podcasts
- ▶ Only **21%** of Podcast users said that medium was their Main Audio type, **17%** name Radio with Music Streaming at **43%** & YouTube at **10%** again highlighting that podcasts are a supplemental choice for many of these listeners

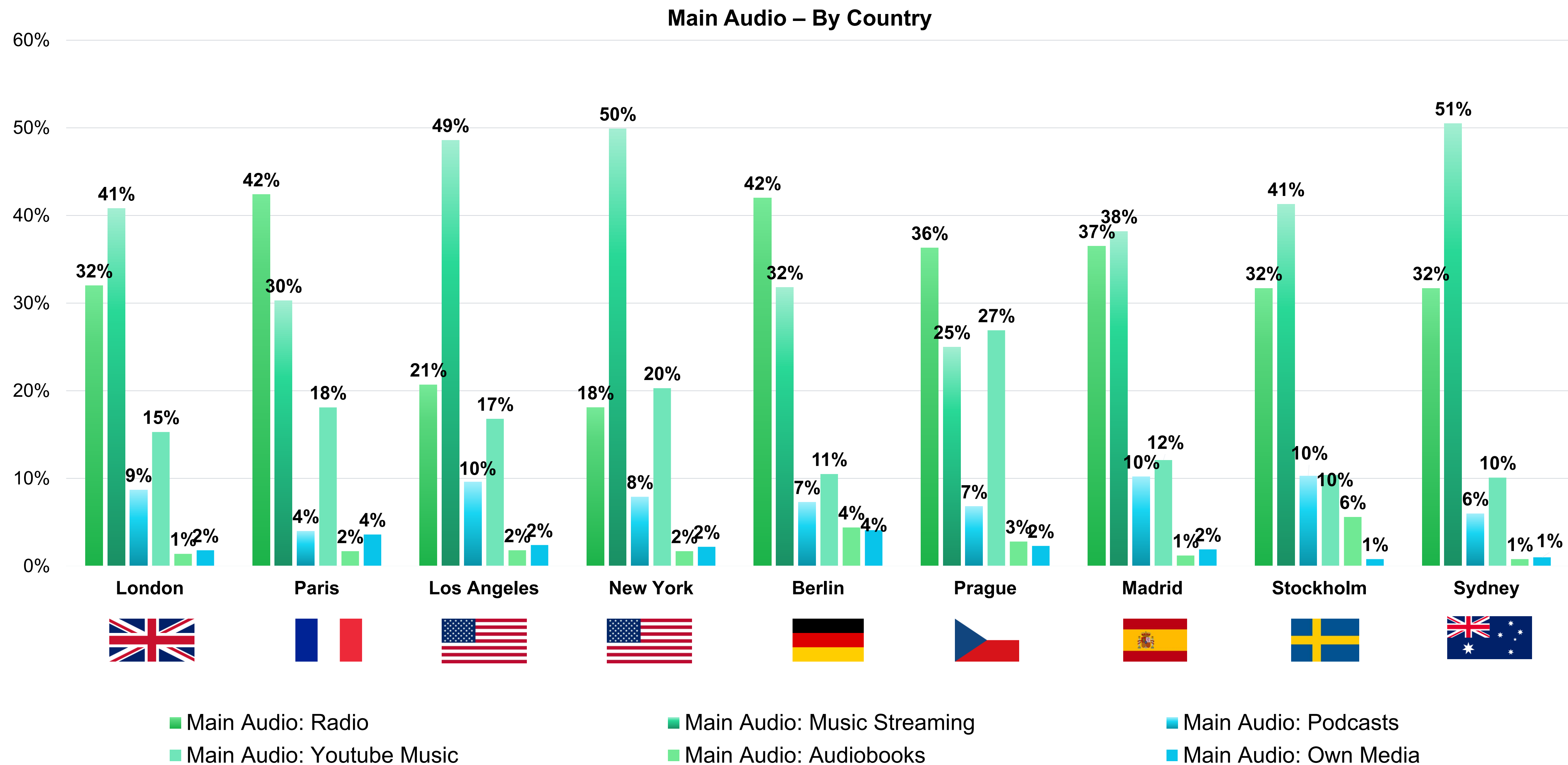
Younger Groups Prefer Streaming But Radio Dominates Above Age 35.

There is a division between Men & Women. Women are much more likely to choose streaming music while Men favor radio. Podcasting is more consistent attracting 8% across both genders and age groups.



Source: What would you say is the main type of Audio you listen too?
N: 4500

US and Australia choose Streaming As Their Main Audio Source - Radio Is Stronger In Europe



Source: What would you say is the main type of Audio you listen too?
N: 4500

25% Have Changed Their Preferred Audio Choice In The Past 3 Months



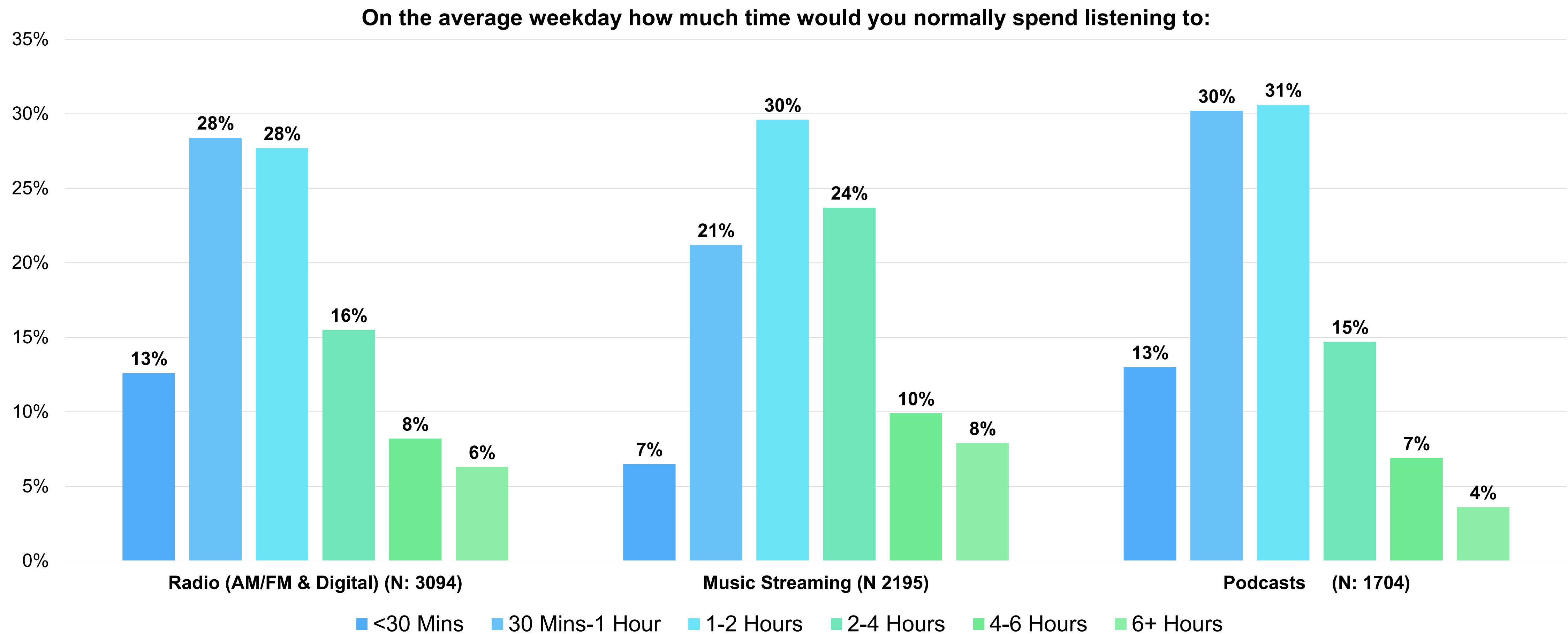
With One In Four Audio Listeners Switching Their Preferred Audio Format In The Past 3 Months, There is A High Level Of Fluidity In Audio Choice, And It Doesn't Just Favor New Media.

In the younger demographics there is the greatest level of shifting allegiances. **35% of 18-34 listeners have** switched their main audio type. Among 35-54 listeners this is only **18%**.

- ▶ Of those who changed, **34%** came from radio, **22%** from Music Streaming, **13%** from YouTube and **10%** from Podcasts
- ▶ Of the total (25%) changers, 42%, now prefer Radio, 30% Streaming, 14% YouTube & 9% Podcast
- ▶ Preference use and changes are not just a one-way movement with listening use and preferences ebbing and flowing based on current interest and motivations.

Radio & Podcast Users Spend Similar Time With Each Platform, Streaming Attracts Greater Time Overall

Music Streaming generates heavier usage among its listeners, compared to Radio & Podcasting. While Radio is still reaching more of the audio market, Streaming attracts higher time spent each week.



Source: On the average weekday how much time would you normally spend listening to:
N: 3094, 2159, 1704

Streaming Attracts The Largest Share of Listening Among The Younger listeners, Radio Dominates 35+ groups.

Time Spent using Music Streaming highlights the shifting tides of consumer behavior. Unsurprisingly, Streaming is much stronger in the younger end, while Radio dominates 35 and over. There are similar splits between Men and Women, radio is tied for overall share with Men, while among women Streaming attracts more time spent.

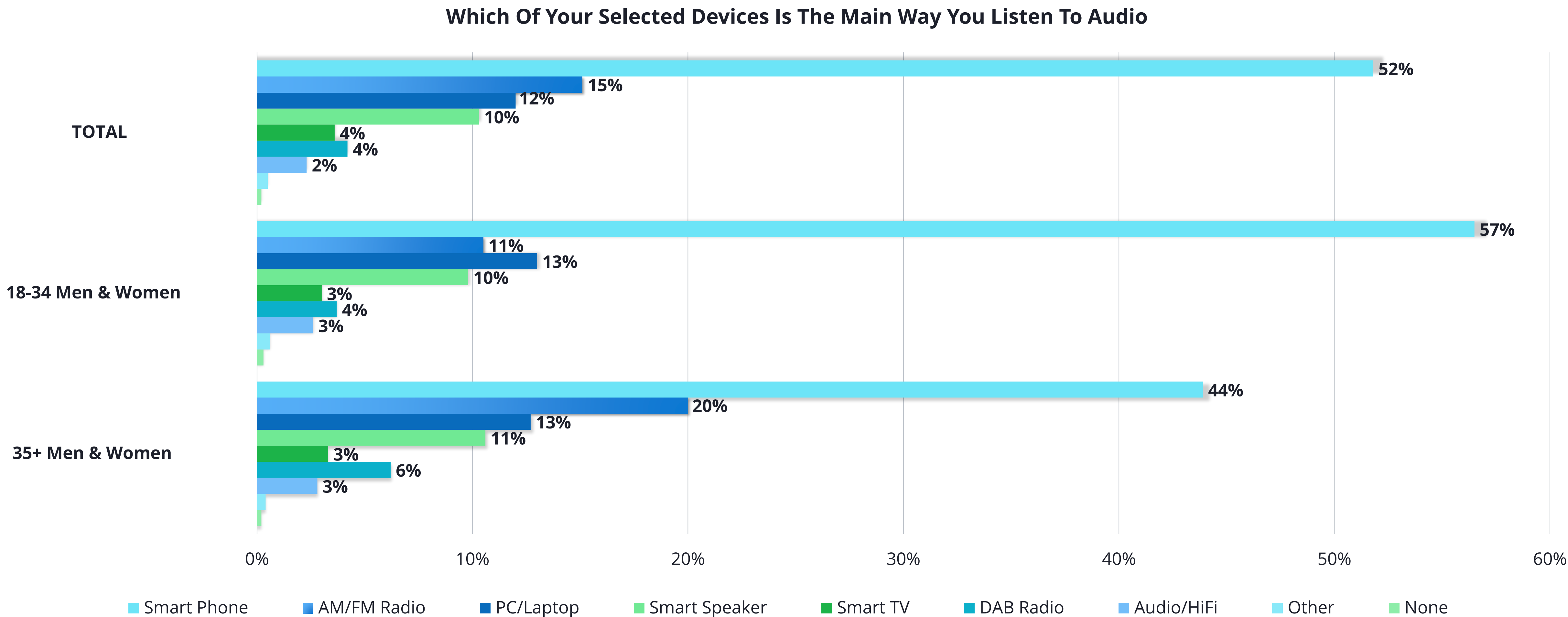
Share Of Total Listening	Radio (AM/FM & Digital)	Music Streaming (Spotify, YouTube Music, Etc.)	Podcasts
Total	38%	43%	19%
18-34 Men & Women	31%	48%	20%
35-54 Men & Women	50%	34%	16%
18-54 Men	40%	40%	20%
18-54 Women	36%	40%	25%

Streaming Has The Highest Share of Total Listening Across Most Markets

While Streaming is ahead, Radio is in a competitive position in most markets, either leading Music Streaming as it does in Paris, Berlin and Prague, or only a few points behind, as it is in Sydney, Madrid and Stockholm. The outliers here are two US markets, where Music Streaming has an especially dominant share of listening. Radio still have decent reach in the US, but not generating the same time spent that we see in other cities.

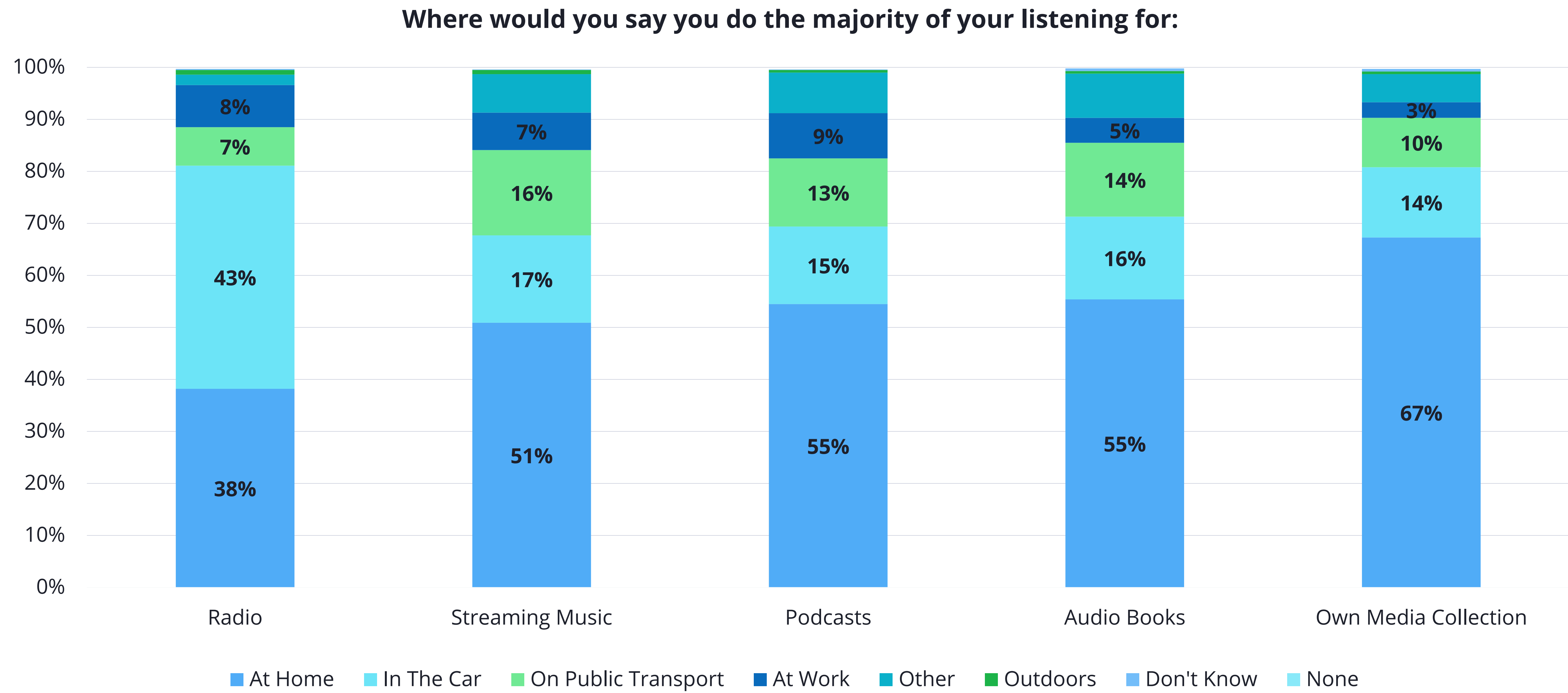
Share Of Total Listening	Radio (AM/FM & Digital)	Music Streaming (Spotify, YouTube Music, Etc.)	Podcasts
Sydney	41%	43%	16%
London	35%	45%	21%
Paris	47%	40%	13%
Berlin	43%	38%	19%
Prague	51%	34%	15%
Madrid	37%	43%	20%
Stockholm	38%	41%	21%
Los Angeles	28%	51%	21%
New York	27%	51%	21%

Most Listeners Now Consume Audio via Smartphone, Ahead Of Broadcast Radio, Computers And Smart Speakers.



Source: Which Of Your Selected Devices Is The Main Way You Listen To Audio:
N: 4500

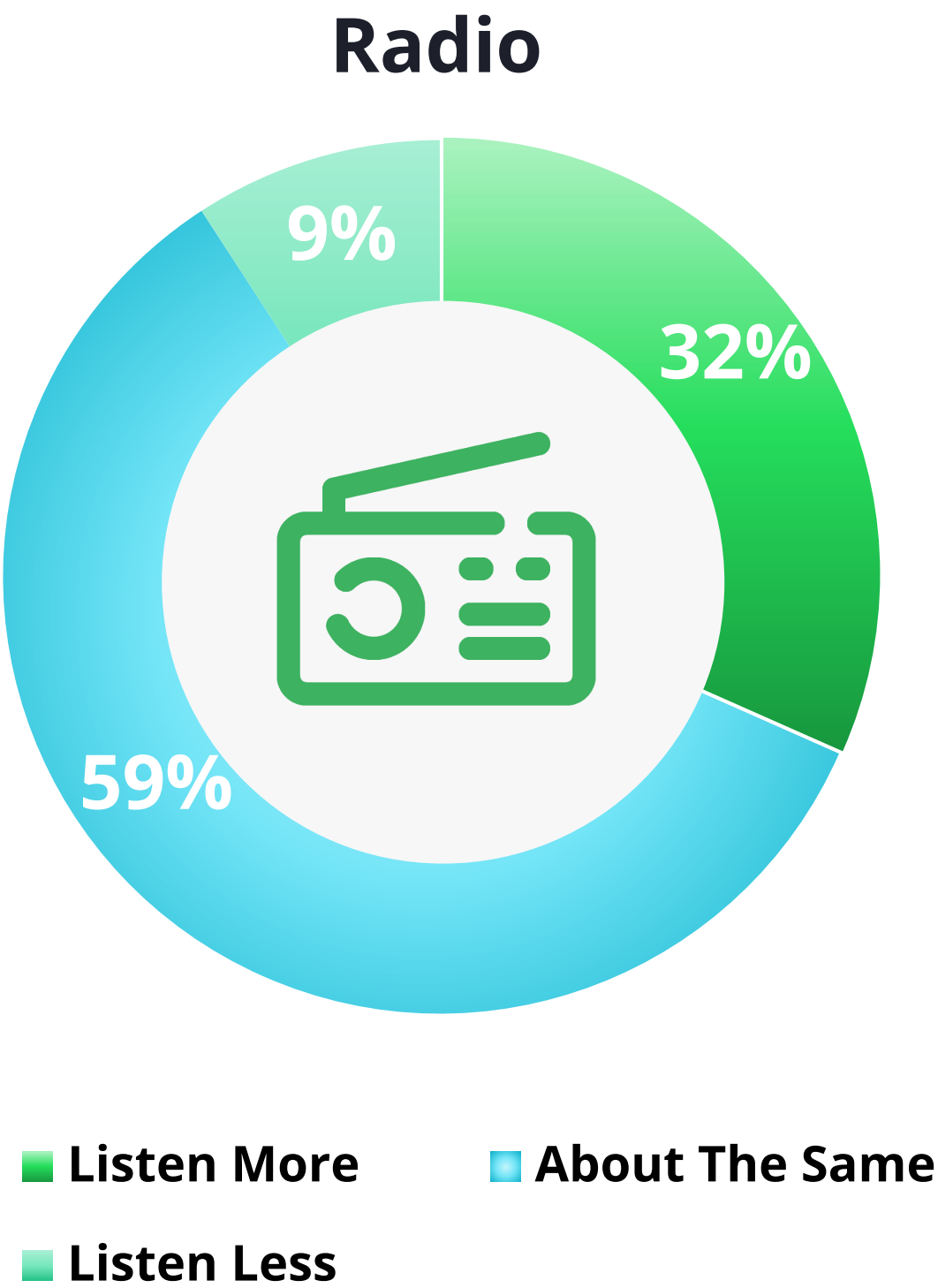
Streaming, Podcast And Other Audio Are Mostly Listened To At Home, While Radio Has Higher In Car Use



Source: Where would you say you do the majority of your listening for:
N: 4500

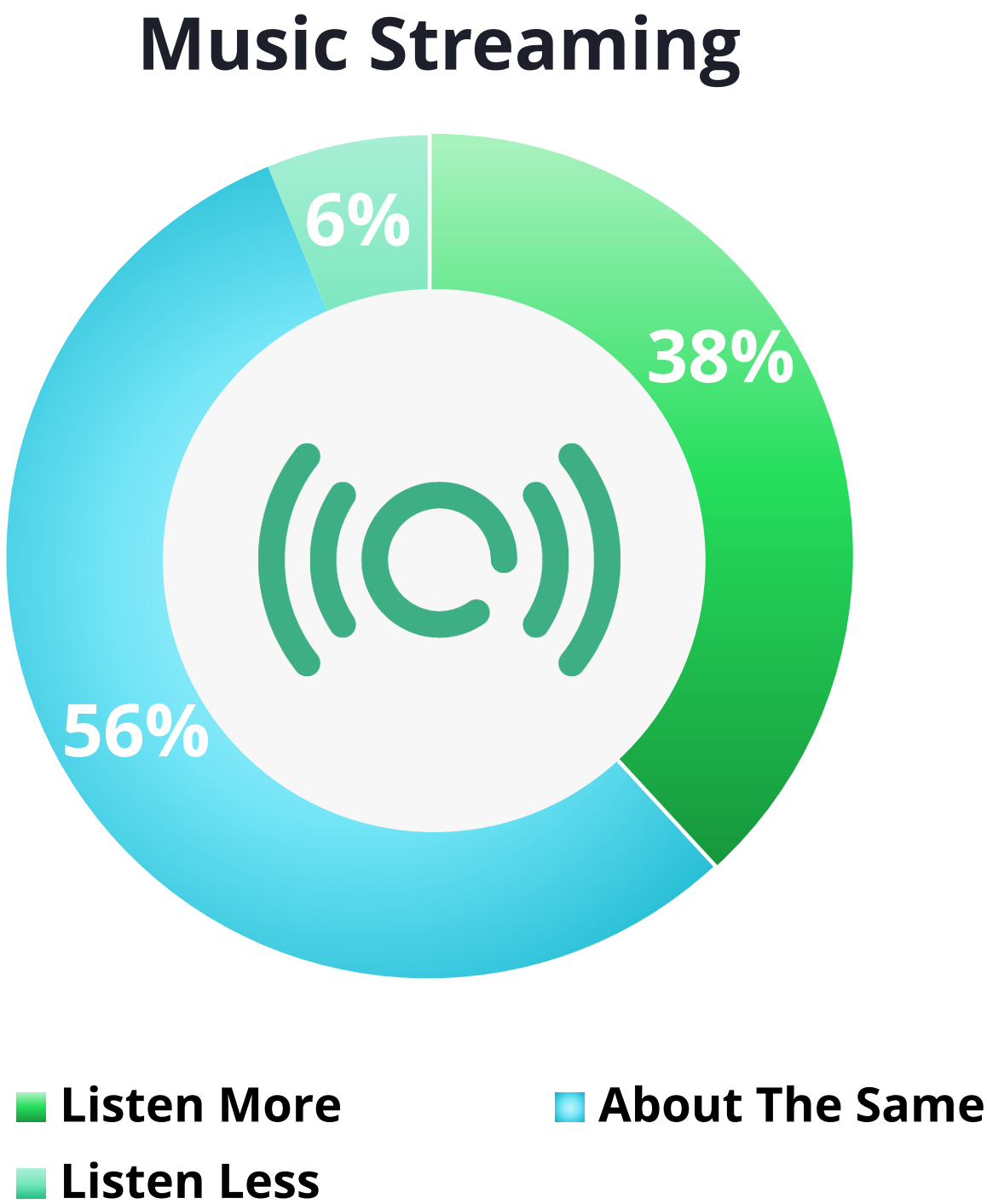
A Majority Of Audio Consumers Are Planning On Listening More Next Year

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



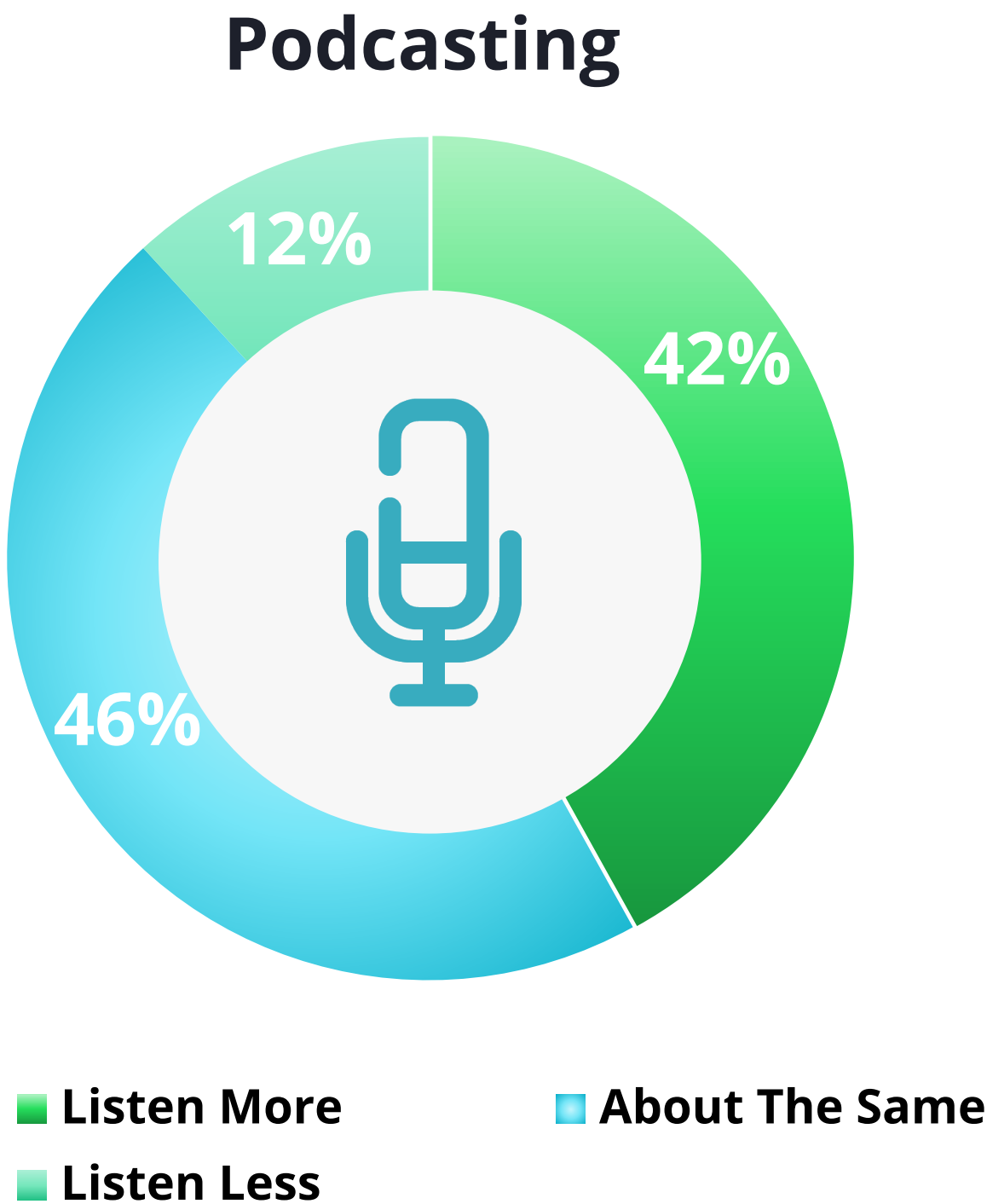
More Or Less Radio In The Next Year

One third of respondents feel they'll be listening more in the year ahead



More Or Less Streaming Music In The Next Year

Music Streaming also has potential for growth few saying they'll be listening less



More Or Less Podcasts In The Next Year

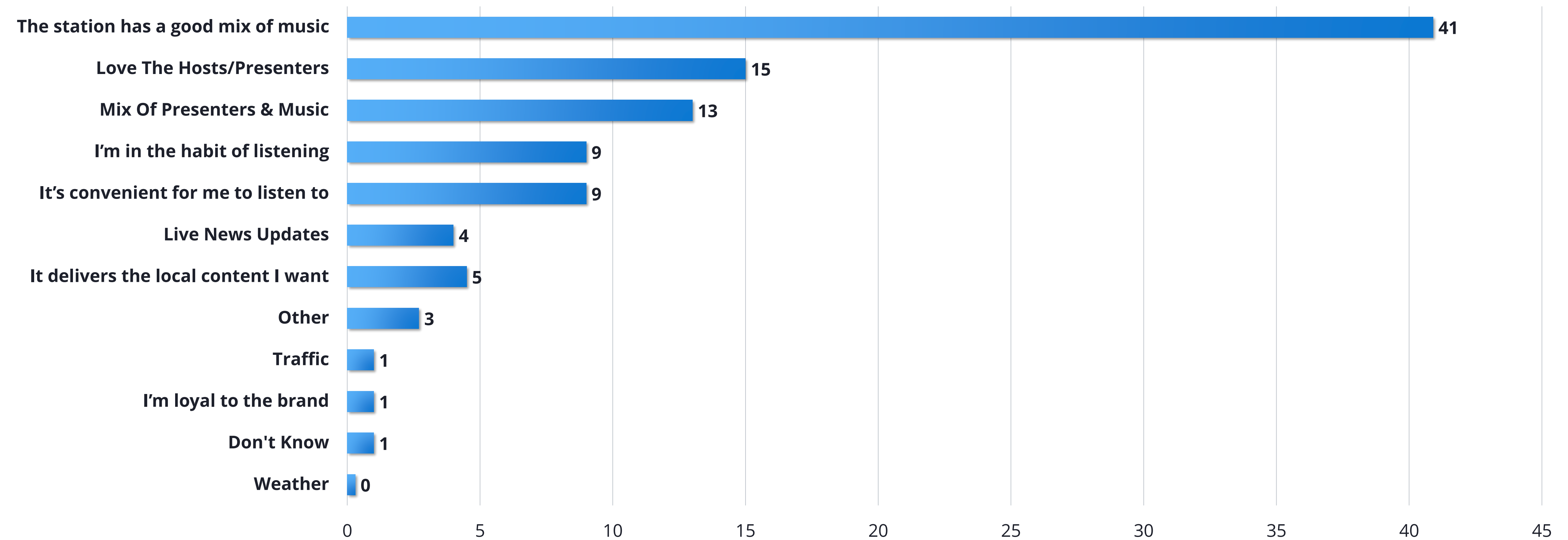
Podcasts have highest listen more and listen less results.

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: 4500

Music & Personalities Are The Main Drivers To Listen To Radio

Radio’s music mix remains one of the main reasons to listen for much of its audience. Although Streaming offers a similar product it has not diluted the radio’s appeal as a music provider. Hosts & Presenters are also a strong driver especially when connected with Radio’s ability to blend music and personality– Radio’s strength continues to be the versatility, together with 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: 3094

Spotify Dominates Music Streaming Choice

Spotify has the largest user base of all music streaming services, none of its competitors coming close to matching it. YouTube, Amazon & Apple Music have the next highest user number, but Spotify is still a clear leader.

Streaming Service Usage	User Rate As % Of Total Market	User Rate As % Of Music Streaming Ecosystem
Spotify User	48%	75%
YouTube Music User	25%	38%
Amazon Music User	16%	25%
Apple Music User	16%	25%
Soundcloud User	10%	16%
Deezer User	6%	9%
Tidal User	3%	5%
Other Music Steamer User	3%	5%

Source: Which of the following music streaming services do you use:
N: 4500

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

Stockholm is Spotify’s home market, so there is no surprise that it dominates in that city. Across most other markets we also see Spotify leading other music streaming providers. Amazon & Apple Music appear to be largely market by market dependent as their userbase varies significantly 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	48%	25%	16%	16%	10%	6%	3%	3%
Sydney	64%	32%	27%	10%	6%	4%	2%	2%
London	52%	28%	18%	20%	12%	7%	1%	4%
Paris	28%	17%	13%	8%	5%	16%	2%	2%
Berlin	35%	18%	26%	17%	10%	11%	6%	2%
Prague	40%	23%	1%	10%	6%	1%	1%	1%
Madrid	52%	20%	13%	18%	10%	4%	3%	1%
Stockholm	66%	18%	3%	7%	9%	1%	1%	1%
LA	52%	32%	20%	27%	16%	1%	5%	10%
New York	46%	35%	22%	27%	14%	2%	3%	9%

Source: Which of the following music streaming services do you use:
N: 4500

News, Interview & Comedy Podcasts Have The Highest Audience Listenership

Both News & Politics and Comedy podcasts have the highest Main podcast results as well, with both True Crime and Sports podcasts achieving similar results. The outcomes here highlighting there a fairly broad podcast audience currently, while News and Comedy are at the top of the pack, there’s a decent audience for most genres currently.

Podcast Genre - Total Podcast Listeners	Main Podcast Genre %	Total Genre Audience %
News & Politics	13%	47%
Comedy	15%	44%
Interview	9%	40%
Health & Self Improvement	7%	36%
Longform Documentary	8%	35%
Pop Culture	8%	33%
True Crime	11%	31%
Sports	10%	30%
Music	6%	28%
History	2%	24%
Technology	3%	22%
Business	4%	22%
Fiction	2%	16%
Other Genre	3%	4%

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

31% Of Podcast Listeners Have Subscribed To A Streaming Service To Access Exclusive Content

Almost one in three Podcast listeners have subscribed to access their favourite shows, there is a clear paid user base for the service.

Younger demographics are more willing to pay to access exclusive podcasts, with **36%** of the 18-34 Podcast Listeners subscribing to at least one service to listen to exclusive shows. Above 35, this number falls to **24%** of podcast listeners.

- ▶ Podcast Listeners in Berlin had the highest rate of subscription to shows at **49%**. LA (**35%**) and Sydney (**31%**) are the next highest, while Stockholm (**25%**) and Prague (**18%**) are among the lowest.
- ▶ **55%** of those subscribing to Podcasts use Spotify, **38%** Amazon, **31%** to Apple while Slate +, Wonderly & Stitcher all in the **15%-10%** range.



What are the Key Insights For Radio?

This study highlights Radio's competitiveness within an increasingly competitive environment. Despite additional Audio challengers and the increased use of Streaming, You Tube and Podcasts, Radio use remains exceptionally strong. Radio as a whole is performing strongly and audio consumers remains highly engaged with the medium.

- **Radio's Strength Is Its Ability To Build Relationships With Listeners**

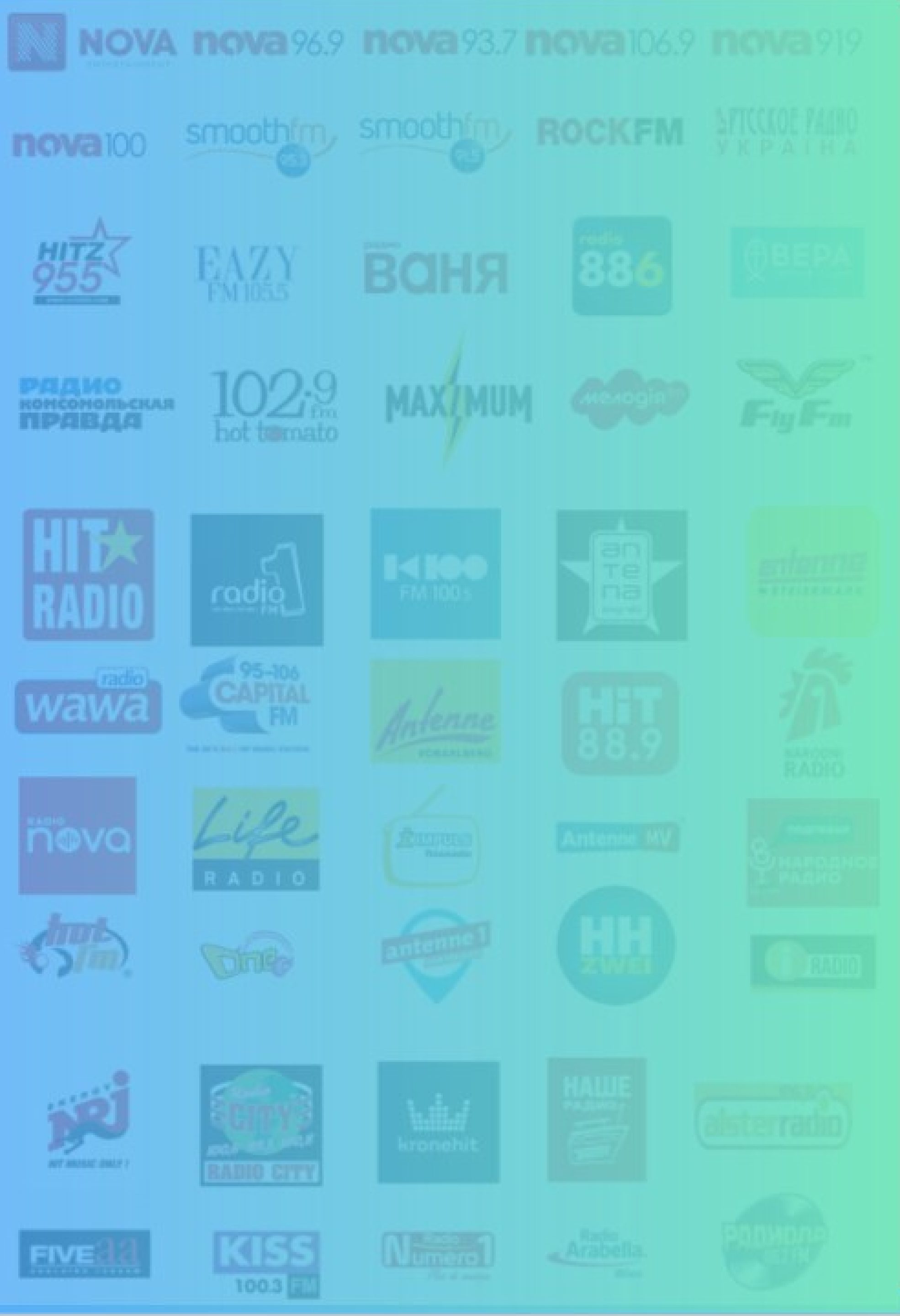
Despite increased competition from new audio sources Radio has maintained its position as the leader overall. Brands, personalities, music & localism all contribute to Radio's ongoing listenership, connecting with audio listeners in a more dynamic way than either Streaming or Podcast can. Radio enjoys a special connection with audio users with a more personal and deeper relationship with their listeners.

- **Despite Streaming's Reach, Radio Is still seen as a Dominant Music Provider**

It could be assumed that Music Streaming would undermine Radio's ability continue to be a music choice. While Streaming may seemingly offer more choice (with limited advertising). 40% of respondents said a radio station's music mix was their main reason to listen to radio. Radio still holds a position as a place for music listening. This result alone bodes well for Radio's future, competing well with music streaming and reaching broader audiences

- **Podcast Listeners are 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, 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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