

What we know about radio and audio audiences

Source: WARC Best Practice, August 2024

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Explores the current reading and thinking on the topic of radio/audio audiences, a group that has undergone significant change as technological advances have broadened access points.

Audio and radio audiences have changed significantly over recent years as technological developments have opened up new access points for consumers, such as podcasts, digital radio and streaming via different digital platforms.

Live radio remains the leading audio format that still delivers considerable reach including among younger audiences, despite increased competition for 'Share of Ear'. Radio has maintained its relevance by embracing new technologies and becoming a purveyor of audio content, so is evolving to respond to consumers' changing needs in terms of both content and how it is accessed.

Streaming is rapidly increasing in popularity and has changed the entire audio landscape. Including music streaming sites on a schedule alongside radio can add incremental reach by engaging with wider audiences. This suggests that broadcast radio plays a complementary role in the digital audio sector.

Accurately measuring the changing face of audio and radio audiences is a major challenge, and positive steps are being taken to address this. There have been a number of different innovative techniques developed to measure audio audiences, but there is a lack of consistency in their approach.

Definitions

Broadcast radio: Radio shows broadcast over an AM/FM dial.

Internet radio: A radio service streamed via the internet.

DAB radio: Digital audio broadcasting (DAB) is audio broadcasting whereby analogue audio is converted into digital radio technology for broadcasting on AM or FM frequency ranges.

Digital audio: Includes audio in a number of different forms such as streaming radio, streaming music and

streaming podcasts.

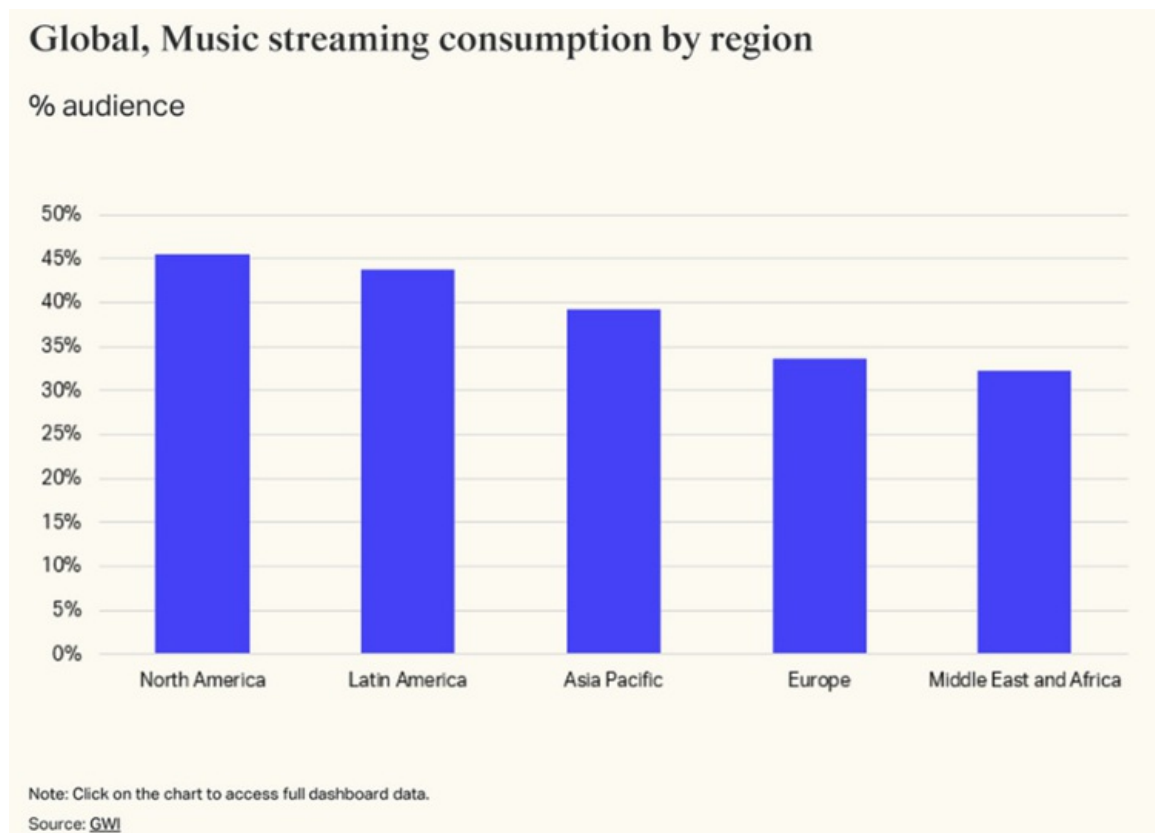
Podcasts: Podcasts are downloadable digital audio files, generally released in a series of episodes that make up a show or collection.

Key insights

1. Music streaming platforms are an underused means of engaging hard-to-reach audiences

While SVOD services have felt the pinch as consumers cut back on subscriptions, music streaming services have held up comparatively well. However, with only about a quarter of brands using music streaming services as a medium in their campaigns, there is an imbalance between share of ad investment in music streaming and share of consumption, **especially amongst younger audiences**. **US-based Gen Z consumers** spend on average nearly as much time each day listening to music streaming platforms (three hours and 7 minutes) as they do on all forms of social media (three hours and 10 minutes), according to GWI data – but many more brands invest in advertising on social media compared to music streaming services.

The level of music streaming consumption varies across global regions. Consumers in North America are most likely to stream music, according to GWI. However, that listening is fragmented across platforms. Spotify (with a share of 31.0%) is the most popular amongst US listeners, followed by Pandora (23.4%), Amazon Prime Music (13.7%) and Apple Music (11.4%).



In the US, audio streaming platforms are winning share of ad spend from local radio stations, with marketers

attracted by the potential for addressability in audio media, particularly in categories **like automotive** with specific audience objectives. Brands are exploring how best to combine audio media's tried-and-tested brand-building credentials with data-driven, programmatic advertising techniques. Spotify believes **greater personalisation** is key to success.

Read more in: [*The Big Picture: Music streaming*](#)

2. AI is enabling targeting of 'untargetable' smart speaker audiences

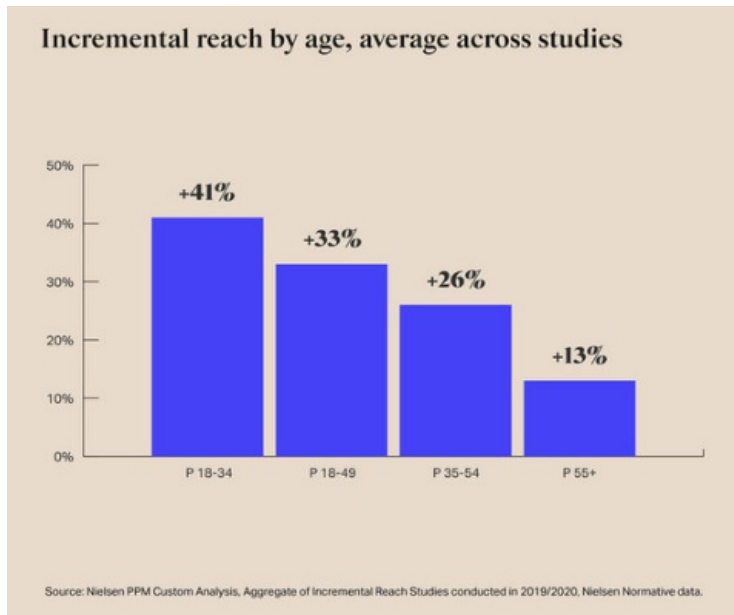
Radio is the most popular use for smart speakers and their share of radio listening is growing. However, these streams have sat behind the walled gardens of the tech giants who own them and have not been able to provide the digital identifiers that marketers need to know who is engaging with their ad campaigns. Media company Global has trained AI to read clues about audiences and filter unidentified listeners into targetable, "look-a-like" behavioural segments. Its models can analyse audio consumption from identifiable users – the streaming services that listeners subscribe to, articles they have read, videos they have watched, and other listening behaviours - and look for similar habits in their unidentifiable counterparts. Across Global's DAX digital advertising exchange, the targetable audience now available to advertisers has increased by a factor of ten since the adoption of this technology (which is also privacy-compliant), with an observed increase in audience engagement.

Read more in: [*How making smart speaker targeting smarter created an opportunity for brands*](#)

3. Radio can still deliver reach, even among younger audiences

Brands may underestimate the value of radio in achieving reach. While radio audiences are not necessarily growing, unlike TV, they have recovered from the pandemic and have remained far more stable. Even amongst younger cohorts, GWI data show that broadcast radio reach globally has barely changed from the two-thirds mark over the last five years. American 18-49-year-olds now spend more time listening to radio than watching traditional linear TV, according to Nielsen. It also seems that **Millennials** are adopting older generations' audio behaviours, listening to increasing quantities of radio. This suggests situational benefits to radio listening, such as in the context of car ownership.

Other Nielsen analysis shows that broadcast radio drives incremental reach across all demographics. The inclusion of broadcast radio within a campaign can boost reach by between 13% and 41%, depending on the demographic, without any increase in advertising spend. Radio can deliver this incremental reach at the local, regional or national levels.



Brand owners like **Procter & Gamble** have spotted an opportunity to use radio to replace reach lost from TV. The company has posted a 43% increase in broadcast radio advertising spend – most of which went to local radio, where multicultural audiences are incidentally strong.

Read more in: [The Big Picture: Radio 2024](#), [The Big Picture: Radio](#) and [P&G looks to radio to replace TV reach](#)

4. Radio consumption among high earners has dropped post-pandemic

The overall picture for radio media consumption remains healthy. For example, [in the UK](#), commercial radio listening has a weekly reach of 89% of the adult population. However, according to data from GWI, listening amongst wealthier audiences globally has declined from one hour and 14 average daily minutes prior to the pandemic, to less than an hour per day in 2023. This may in part be a result of affluent office workers [commuting less](#) often in the week, while data also show that wealthier consumers are also increasingly drawn to podcasts.

Read more in: [The Big Picture: Radio](#)

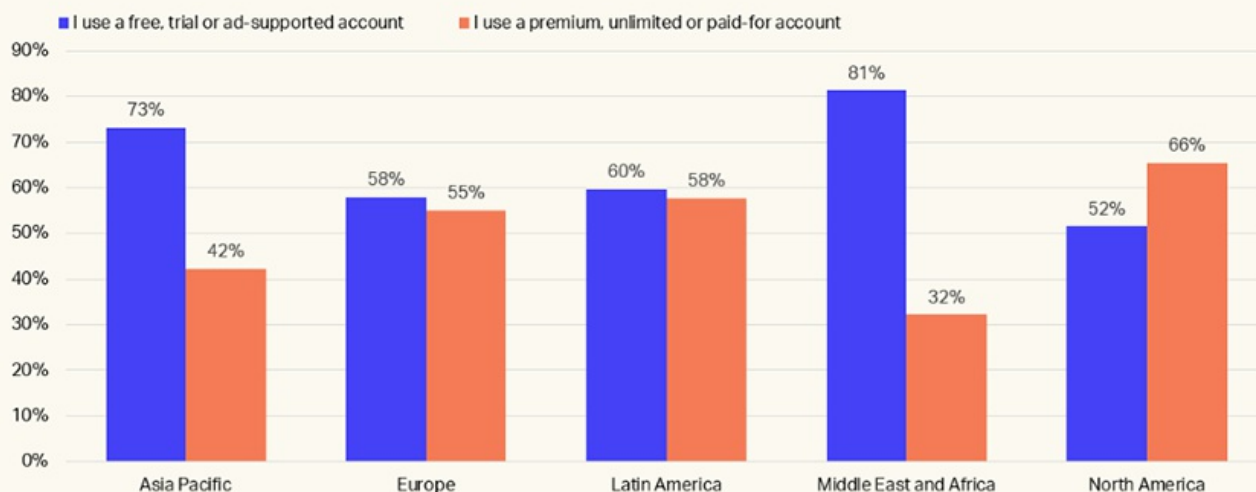
5. YouTube has a growing audio audience, as the line between audio and video podcasting blurs

Over half of global music listeners use a free or ad-supported music account. Those in Asia Pacific, Middle East and Africa are more likely to use free or ad-supported music services while North America has more users with at least one premium paid account, according to [GWI data](#).

Global, Types of music streaming service accounts used

WARC Media

%, music streaming service users who have used each type of account in the past month



Note: Data from Q4 2021 – Q3 2022. The survey question asked: "For each of these services, could you tell us which type of account you use?". 'I use a free, ad-supported account' refers to people who said they have used Amazon Music Unlimited, Amazon Prime Music, Apple Music, Deezer, SoundCloud, and Spotify in the last month, and then followed it up saying they used a free, ad-supported account to access that service. 'I use a premium, unlimited, paid-for account' refers to people who said they have used one of the same services, and then followed it up saying they used a premium, unlimited, paid-for account to access that service.

SOURCE: GWI

Spotify reached 626 million monthly active users globally in Q2 2024, of which 393 million were Ad-Supported monthly active users. However, in 2022, according to Activate Consulting, **YouTube became the most popular platform** for both music and podcast listening in the US with a 39% share of listeners, ahead of Spotify at 37% and Amazon Music at 30%. Its study also found that 81% of US listeners aged 18+ listen to both podcasts and music on the same device.

A US survey by research firm Morning Consult found that **YouTube was the preferred platform for listening to podcasts** – YouTube came out top at 33% with Spotify at 24% and Apple Podcasts at 12%. Morning Consult also found that 46% of active US podcast listeners prefer to watch podcasts as they listen, compared with 42% who just listen. The reason for this preference is that 51% of listeners enjoyed the physical expressions and reactions of the hosts and guests, while 50% said it helps them to focus. While this data is only for the US, other sources suggest that around 83% of global YouTube users go to the platform for music so it could become a key podcasting platform in other countries as well.

Read more in: [*More than half of global music listeners use a free or ad-supported music account, YouTube becomes the most popular platform for both music and podcast listening and YouTube is a major podcast platform, and video is key*](#)

6. Audio streaming enhances listeners' daily lives

A study conducted by Spotify and Mindshare identified six key identity mindsets linked to people's audio streaming behaviour, which advertisers can use to engage with empathy and create a stronger connection between brands and their target audiences:

- **Self-expression** – Streaming music gives people a sense of belonging and podcast listening reflects identity. 58% of people agreed that the podcasts they listen to say a lot about who they are, although nearly half of respondents (47%) said that people would be surprised to know what podcasts they listen to.

- *Connection* – Streaming music gives people a way to connect with others, with 40% saying that playlists allow them to do this. Podcasts are also a way to connect, as 55% agreed that sharing podcasts is a way to start conversations and socialise with others.
- *Moods and emotions* – Music streaming provides instant gratification and triggers the nostalgic emotions inherent to people's identity, with 65% of people having different playlists for different moods.
- *Pushing cultural boundaries* – 68% of people listen to podcasts to get different points of view on a specific topic, and 61% agreed that podcasts help them to develop a deeper understanding of different cultures.
- *Activity/movement-based moments* – 75% of people said that podcasts allow them to enjoy content while they are on the go or doing other things.
- *Discovery* - streaming platforms are the way to discover new and relevant music, with 70% saying that they are always able to find great content to listen to.

Further research conducted by Spotify with psychophysiological measurement company MindProber found that digital audio is:

- *An all-day, everyday ritual* for listeners that they integrate into every part of their lives, especially during 'screenless moments' when they cannot or prefer not to engage with visual media.
- *A mood booster* whatever the time or circumstance of listening and music choice. In fact, many listeners tuned in with the goal of changing their mood.
- *A reflection of real life* as music choices correlate with physical environments and are very specific to physical activities.
- *Not spoiled by advertising* as listener engagement stays high during ads which are accepted, remembered and can prompt further brand engagement.

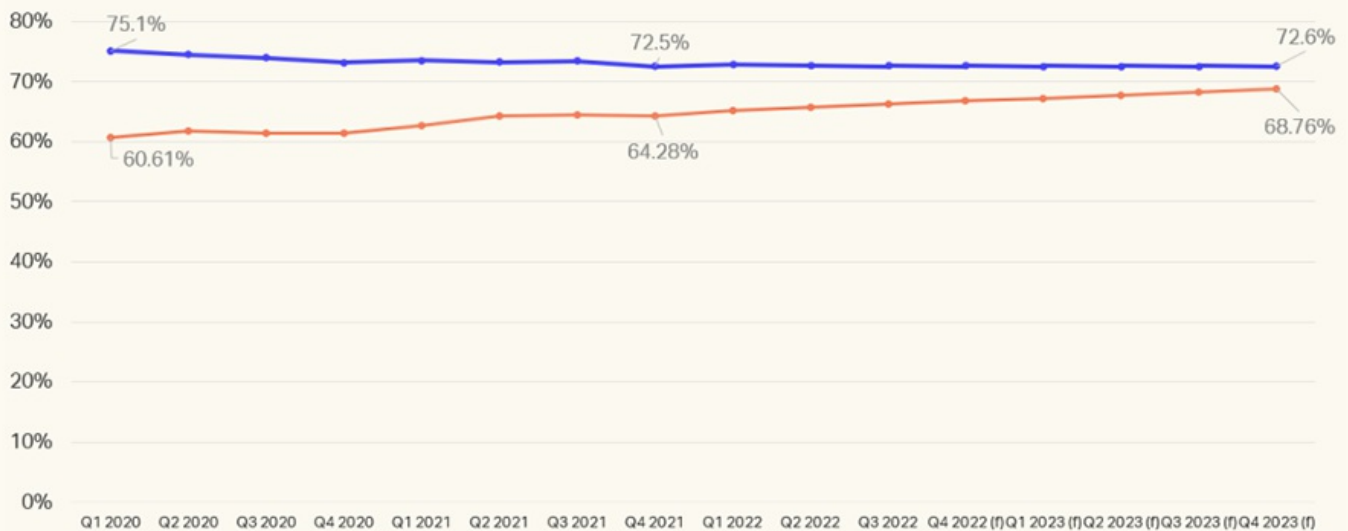
Read more in: [Audio streaming unlocks people's identity and brings communities together](#) and [Sonic Science 2.0: How audio affects listeners physically](#)

7. Podcast audiences are growing, especially among younger, affluent, ethnic minority demographics

[Ever-larger audiences are reached via podcasts](#), with an 8% increase in reach over 2020-22. In 2023, 69% of online users will be reached via this channel, closing the gap with broadcast radio.

Global, Broadcast radio and podcast reach

%, online population



Note: Data are based on quarterly surveys from GWI. Periods denoted with (f) are WARC forecasts.

Source: WARC Media, [GWI](#)

In the US, one-half (49%) of the podcast audience is a **light listener**, only listening one to three times a month, according to research from Nielsen. However, **over one-quarter (28%) of the population listens to podcasts weekly**, equal to an estimated 80 million Americans, according to the latest data from Edison Research and Triton Digital. This figure has almost doubled since 2017. Furthermore, **podcast audiences are now more diverse than the wider US population**, according to data from Nielsen. Quicker podcast growth among diverse audiences means Hispanic, Black, Asian American and 'other' listeners collectively account for 41% of podcast listeners – compared to just 34% of all adults.

Podcasts can engage with audiences on a mass scale with shows that have vast audiences – for example, **millions listen to 'The Daily' from The New York Times**. Research from the Reuters Institute shows how daily news podcasts are key to news brands attracting younger audiences. The COVID-19 pandemic has boosted podcast audiences, with 13% of US and UK consumers claiming to have started listening to podcasts or consuming them more, and **61% of those consumers saying they plan to continue with the habit**. This growth is skewed towards men, higher incomes and Millennials. **Gen Z** is also more likely to consume podcasts, though growth varies by region with Latin America in the lead. **UK Gen Zs** in particular are using Spotify podcasts to educate themselves: the education category surged 61% over the last year and, in the first half of 2023 alone, Gen Zs in the UK generated 250 million podcast streams. Half of those users reported that podcasts “get them closer to the zeitgeist of culture than any other form of media,” while 76% of UK Gen Zs use podcasts to learn about topics “they wish they’d learned about in school”. Importantly, **Spotify data** shows Gen Z trust ads more on streaming platforms than social media.

The podcast audience is not only growing globally but so is the **amount of time spent listening to the**

medium. WARC forecasts that the **daily average time spent on podcasts will reach 54 minutes** in 2023. An Edison 'Share of the Ear' report found that the average listener consumes seven podcast episodes a week, which is also increasing over time. And according to the **2018 Infinite Dial Report**, the average podcast listener finishes 80% of a podcast episode (which averages nearly 39 minutes, according to podcast.co).

While podcasting was once a very male-dominated medium, it is **increasingly popular among women** – a 2022 report found that listenership is up 67% versus 2017 with more than one in three US adult women having listened to a podcast in the last month and an estimated 47 million women listening monthly. The report also highlighted that female podcast listeners are more likely to be younger, employed, mothers, well-educated, and have higher household incomes. Another study revealed that women appreciate how podcasts can enhance their everyday routine. Additionally, women like to share and promote podcasts among their networks of friends and family, and to engage with their favourite shows via social media platforms. However, women feel that there is still a lack of female representation – especially people of colour - in podcast production and would like to see more female perspectives and voices within the medium. Importantly, as listeners are very receptive to brand messages, particularly in shows created by women, there is opportunity for brands to drive affinity by supporting female creators.

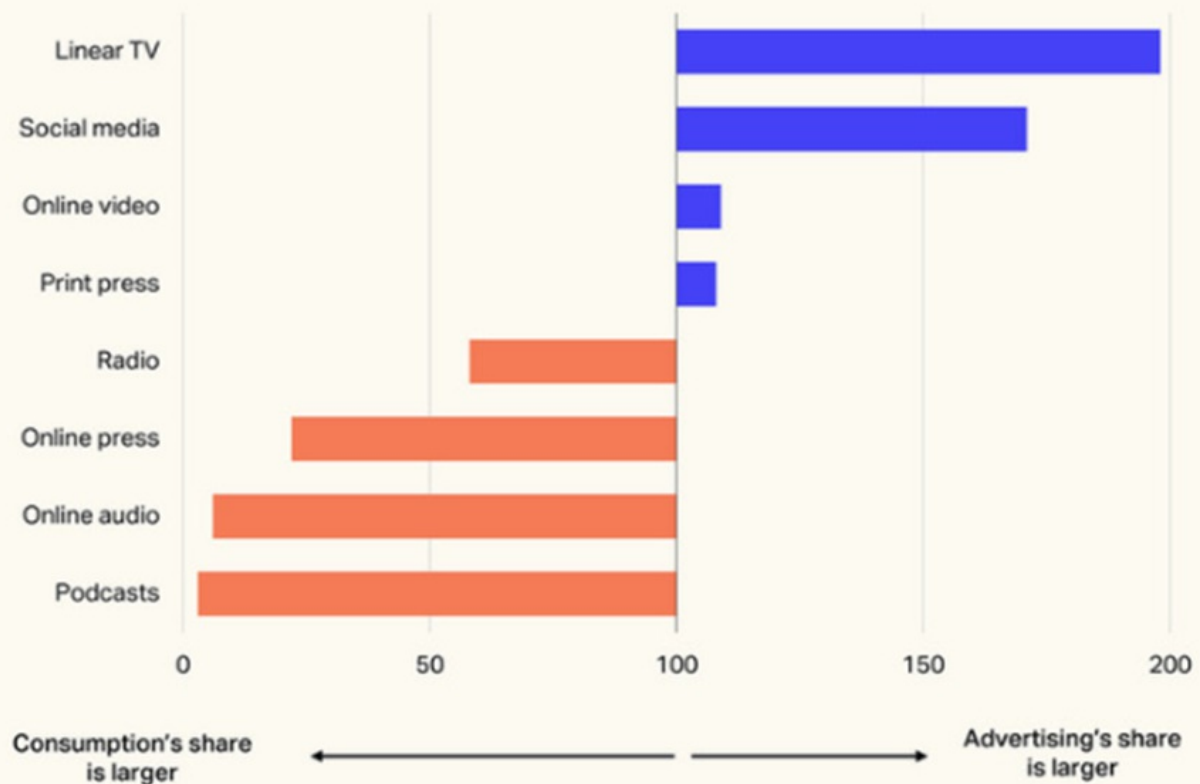
*Read more in: **The Big Picture: Podcasts, Understanding women podcast listeners and how the medium can be leveraged to broaden reach and deepen engagement, Daily news podcasts build younger, more loyal audiences** and **An underestimated opportunity: Why brands should take the podcasting plunge***

8. Radio and audio spending does not match audience consumption

With digital creating new distribution points, and emerging formats like podcasts growing fast, radio and audio's share of consumption is rising by the year (31% in 2021), but advertising dollars have yet to follow. Share of advertising spend would need to increase at least threefold to match share of consumption, with **online audio and podcasts having the biggest investment gap**. Podcasts are forecast to attract \$1.52 billion in advertising spend worldwide in 2022, but this figure would need to be closer to \$41.56 billion in order to match daily consumption. Radio ad spend is almost half the rate of consumption. In absolute terms, advertisers would need to spend \$46.9bn on broadcast radio to match consumption levels, considerably below forecasts. Radio and audio's **share of consumption is higher than its share of adspend across all demographics**. Relative to listeners overall, the gap is particularly marked amongst men, 16–34-year-olds, Black and Latinx consumers and high-income groups.

Global, The Investment Gap, 2021(f)

Index for advertising/consumption gap



SOURCE: WARC Data, GWI

WARC Data

Read more in: [Global Ad Trends: The Investment Gap](#) and [The investment gap: Understanding the value of audio](#)

9. Radio audience ratings largely reflect real advertising exposure

Radio delivers an audience reach of over 90%. However, many advertisers believed historically that radio ratings may overestimate real advertising exposure, estimating as much as one-third of the audience switch stations during radio-advertising breaks. A Canadian study conducted by the Ehrenberg Bass Institute used portable people-meter data ratings to measure loss of audience during advertising. It discovered that “mechanical avoidance” – audience members taking actions like switching to another station or turning off the radio rather than listening to ads – was generally low at an average of 3% across the day. This rate is about one-tenth of current estimates, but was higher for music versus talk stations, out-of-home versus in-home listening, and early versus late dayparts.

Read more in: [A new benchmark for mechanical avoidance of radio advertising: Why radio advertising is a sound investment](#)

10. Radio audiences are receptive to advertising, whether paying attention or not

If something is not looked at, then it cannot be seen. However, if something is not listened to, it will still be heard as hearing is passive, involuntary and effortless – this allows ads to work their way into consumer consciousness and trigger changes in behaviour even when people are not paying attention to them. For example, Radiocentre's 'Building Shelf Awareness' research study found that having been passively exposed to radio ads when driving to the supermarket, respondents were 11% more likely to notice the advertised brands on-shelf and 30% more likely to buy them.

Also, radio's editorial context boosts audio advertising processing according to Radiocentre's '[Emotional Multiplier](#)' study. This identified that radio's mood-boosting editorial effect extends into the ad break, enhancing engagement with advertising by 30% compared to when heard preceded by silence.

Read more in: [Listen up: Why attention is an unhelpful measure for audio communication](#) and [Building shelf awareness: Quantifying radio's last-minute influence for FMCG brands](#)

11. Brands are re-discovering radio, especially for targeting and salience

The benefits of long-established media such as TV, radio and print are often undervalued compared with digital. The 2018 [Re-evaluating media](#) report from Ebiquity and Radiocentre showed that this was particularly the case for radio. While TV was the best-performing medium, radio came second. Radio was rated as the top medium for targeting the right people at the right time and at the right place. Along with TV, radio also offered the best ROI, a return which has been growing steadily.

A follow-up study in 2020 in the wake of the pandemic – titled [Re-Evaluating Media for Recovery](#) – confirmed that radio remains the second most valuable medium after TV. It also found that perceptions of radio are catching up with reality for certain attributes (eg targeting the right people in the right place at the right time; building brand salience) meaning that radio's overall perception ranking has improved from sixth to third. These improved perceptions appear to be influencing spending intentions with a net figure of 19% of advertisers planning to invest more in the medium in 2021 – the highest shift for any traditional medium.

Read more in: [Re-evaluating media](#) and [Re-evaluating media for recovery](#)

12. Voice-activated devices are increasing audio listening

The main entertainment function for UK users of devices such as Amazon Echo or Google Home is listening to audio. Over three-quarters (77%) listen to the radio every day, 60% and 50% to Amazon Prime Music and Spotify respectively, and 42% to podcasts. And because of hands-free control, users are increasing time spent listening to both live radio and streamed audio as an accompaniment to other tasks. In this context, advertising is best accepted within radio versus other forms of audio, with one-third of the audience receptive to being able to ask the device for more information after hearing an ad. Research in the US from NPR, the public radio broadcaster, and Edison Research also shows that smart speakers are the first or second most used option for radio listening.

Research from DAX, the digital audio exchange, showed that 84% of UK advertisers and agencies said that digital audio would play a greater role in their media plans. Voice-activated devices are set to broaden their reach, according to [data](#) from technology company Qualcomm, as consumers use them for a broader range of

purposes and as, fuelled by additional purchases, devices spread from the most common location – the living room – to other locations inside and outside the home.

Read more in: [Smart speakers moving beyond the living room and basic tasks](#), [How smart speakers are changing consumer behavior](#), [How Amazon Echo is changing the marketing environment](#) and [How digital audio, voice are reviving radio](#)

13. Audio and OOH are combining to engage active audiences

Audio and OOH media are both consumed by active people when out-and-about. Combining both channels enables brands to be part of a variety of moments and create greater impact. UK-based media group Global is evolving DAX, its programmatic ad platform launched in 2014 to target digital audio audiences, to incorporate selling digital OOH sites. Brands are able to buy audiences based on data from Route, the UK OOH media measurement body. The move provides opportunities in the area of geo-targeted, location-based advertising, dovetailing audio and OOH targeting to increase the likelihood of a consumer hearing an audio ad and seeing a relevant DOOH ad within close proximity. For example, energy firm E.ON carried out a national 48-sheet OOH campaign, and used location data to geo-target audio ads to reach more people throughout the day. When a listener entered a geo-fenced zone, DAX served an audio ad corresponding to the poster site. As a result, E.ON saw four times more smart meter sign-ups than average site traffic and a 26% increase in consideration.

Read more in: [Media owner profile: Global sets out its plans to combine audio and OOH media](#)

More on this topic

WARC topic page: [Radio & audio](#)

WARC topic page: [Audience measurement](#)

WARC case studies: [Radio- and audio-led case studies](#)

WARC Best Practice: [What we know about podcasts in marketing](#)

WARC Best Practice: [What we know about radio and audio effectiveness](#)

WARC Media: [The Big Picture: Online audio](#)

Further reading

[Radio moves online and increases listening hours](#)

[Audio is a new entertainment destination for Indian consumers](#)

[Audio advertising: State of the nation 2023](#)

[A third of UK consumers watch music videos daily](#)

[How Audible Australia transformed the book club experience with Twitch](#)

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Marketing with a focus on audio

The future of audio advertising: How to tackle ad avoidance

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