





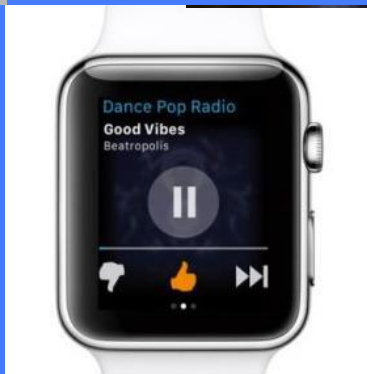




# Key trends in the international audio landscape



# Audio is ubiquitous and its consumption is growing

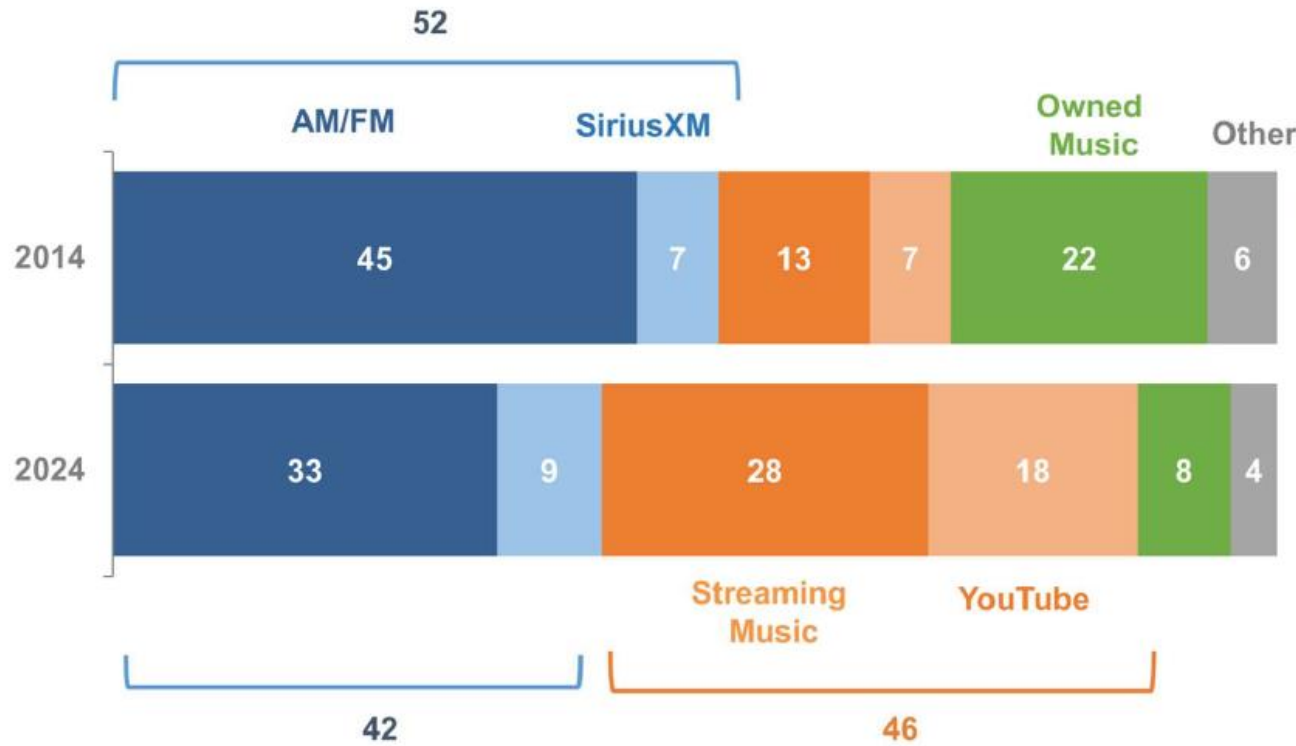
	<b>More Content</b>		<b>More Players</b>		<b>Higher Coverage</b>	
<b>More Devices</b>		<b>More Formats</b>		<b>Enhanced Quality</b>		<b>Live &amp; On-demand</b>

# Streaming is on the rise



## Share of Music Listening Time by Platform

U.S. Population 13+

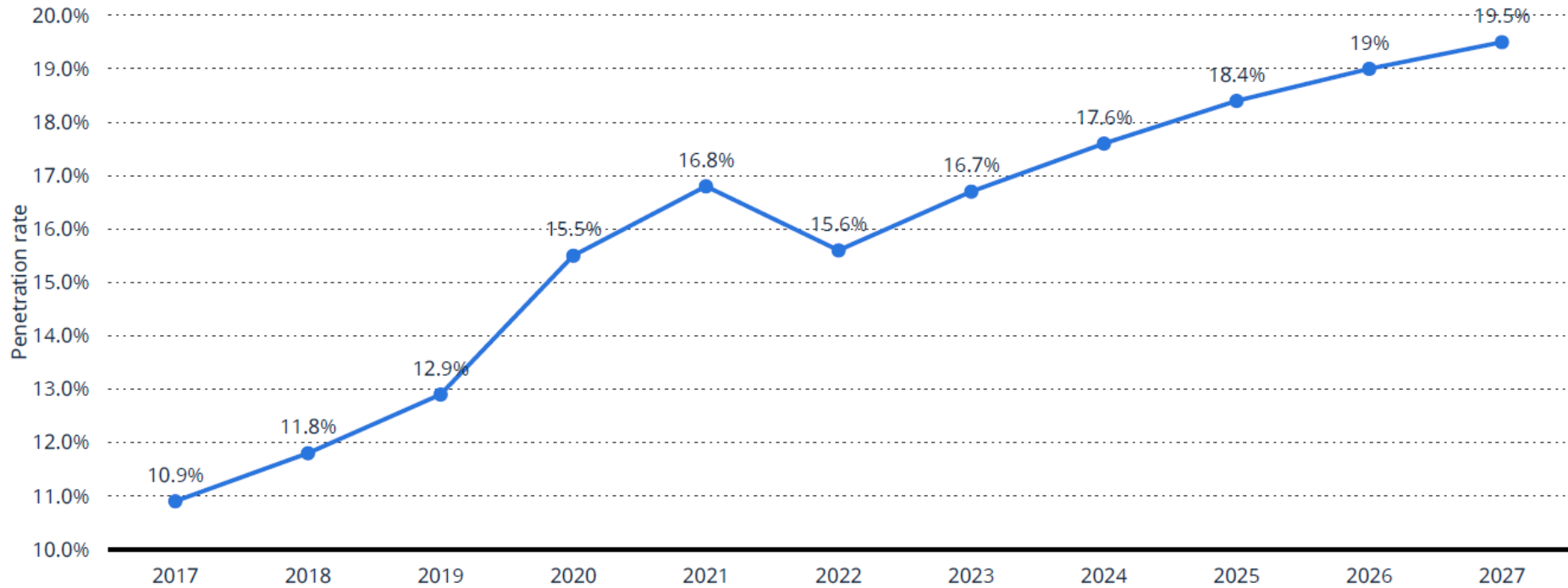


Source: Edison Share of Ear 2024

# Streaming is on the rise



## Penetration of music streaming in Europe



7 | Description: According to a study from August 2023 on music streaming in Europe, the music penetration rate has been steadily increasing over the last years and is predicted to continue its growth. The slight dip from 2021 to 2022 might be explained by considering the change in consumption during the Covid-19 pandemic in comparison to the changed circumstances a year later. [Read more](#)  
Note(s): Europe; 2017 to 2023  
Source(s): Statista Digital Market Insights

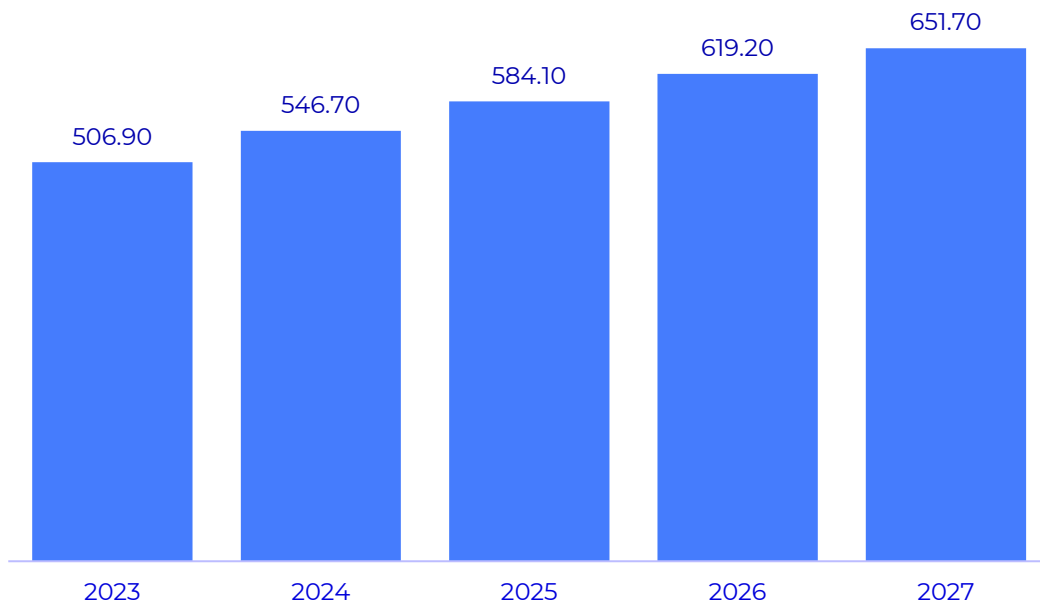


Source: Statista Digital Market Insights

# Podcast listeners are increasing

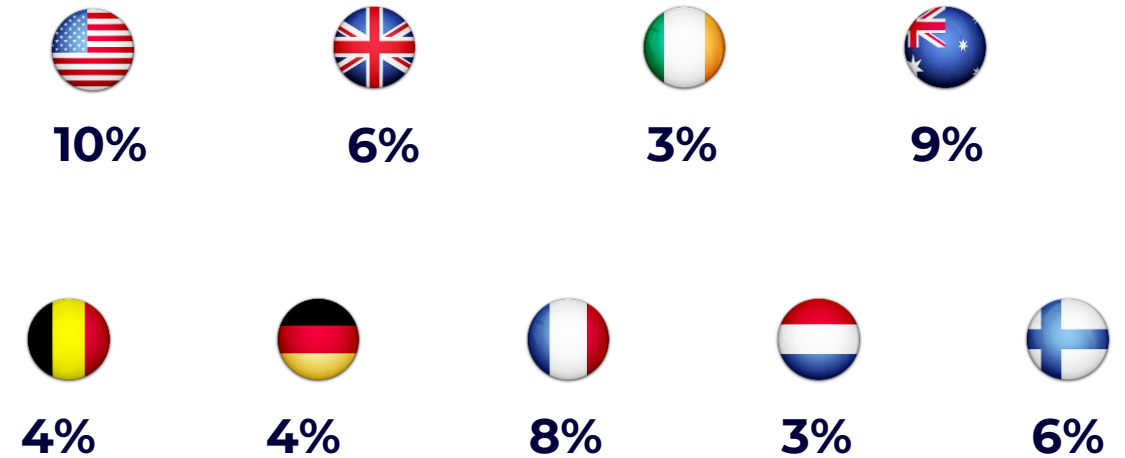
But it's audience share is still low in Europe

Number of podcast listeners worldwide (millions)



Source: eMarketer© Statista 2025

Podcast's share of listening



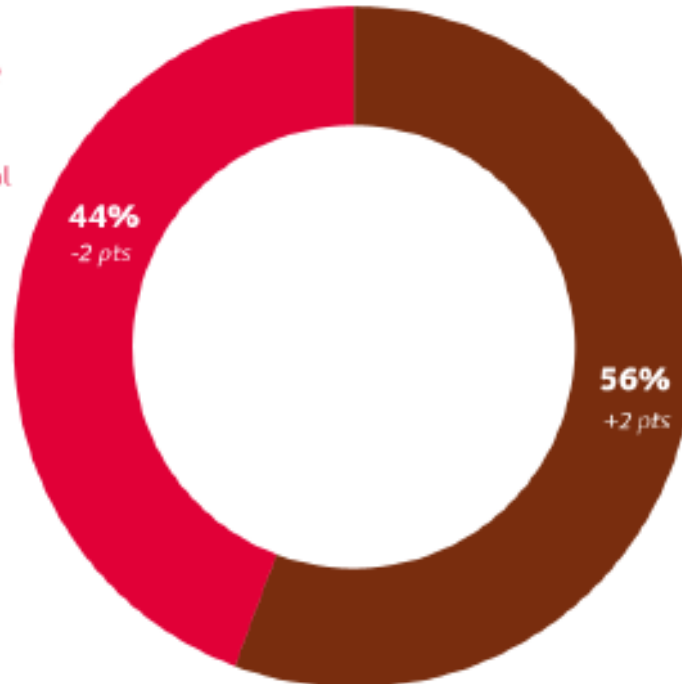
Source: egta

# Digital audio consumption continues to grow

Share of time spent on each offer over a day in France



**Audio offline**  
Live radio offline  
Owned music  
Audio books - non digital



**Audio digital**  
Live radio on digital devices  
Radio podcasts (replay and original)  
Original podcasts (excluding radio)  
Audio books - digital  
Streaming music  
Streaming music video (background music)

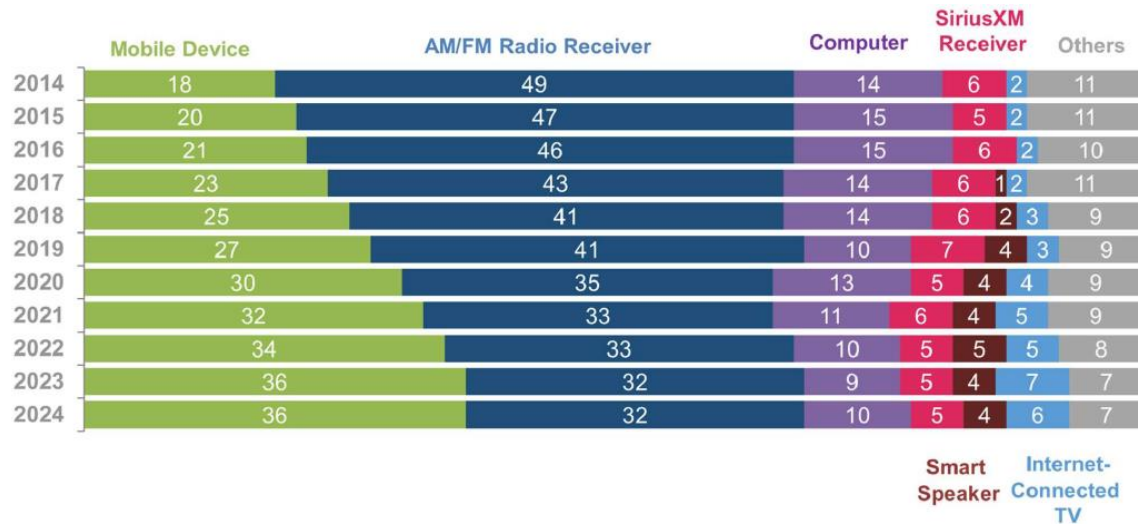
Source: [France](#): Mediametrie Global Audio 2024 – total 15-80 yo

# Audio is migrating to digital devices

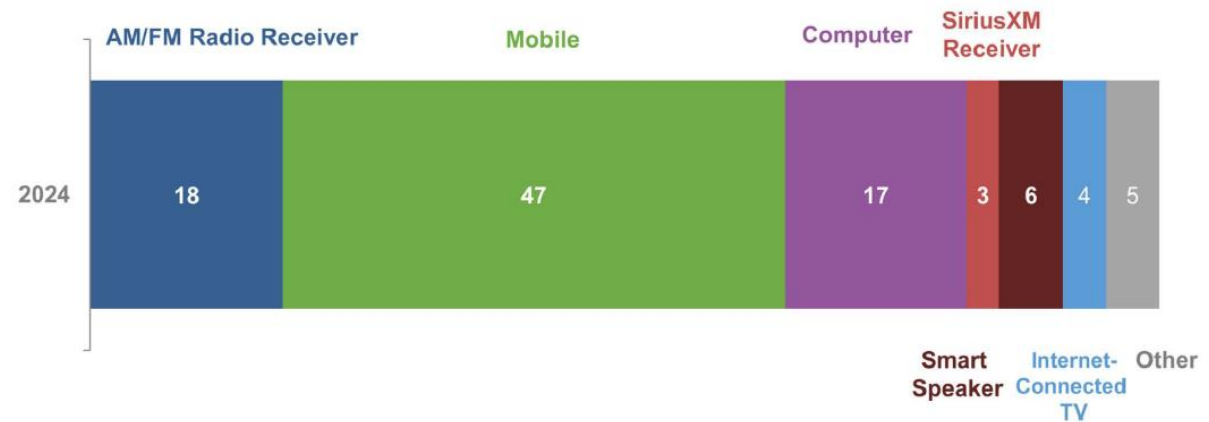
Americans spend more time with audio through a mobile device than a traditional radio receiver



Audio listening time by device – tot 13+



Audio listening time by device – GenZ (13-22 yo)

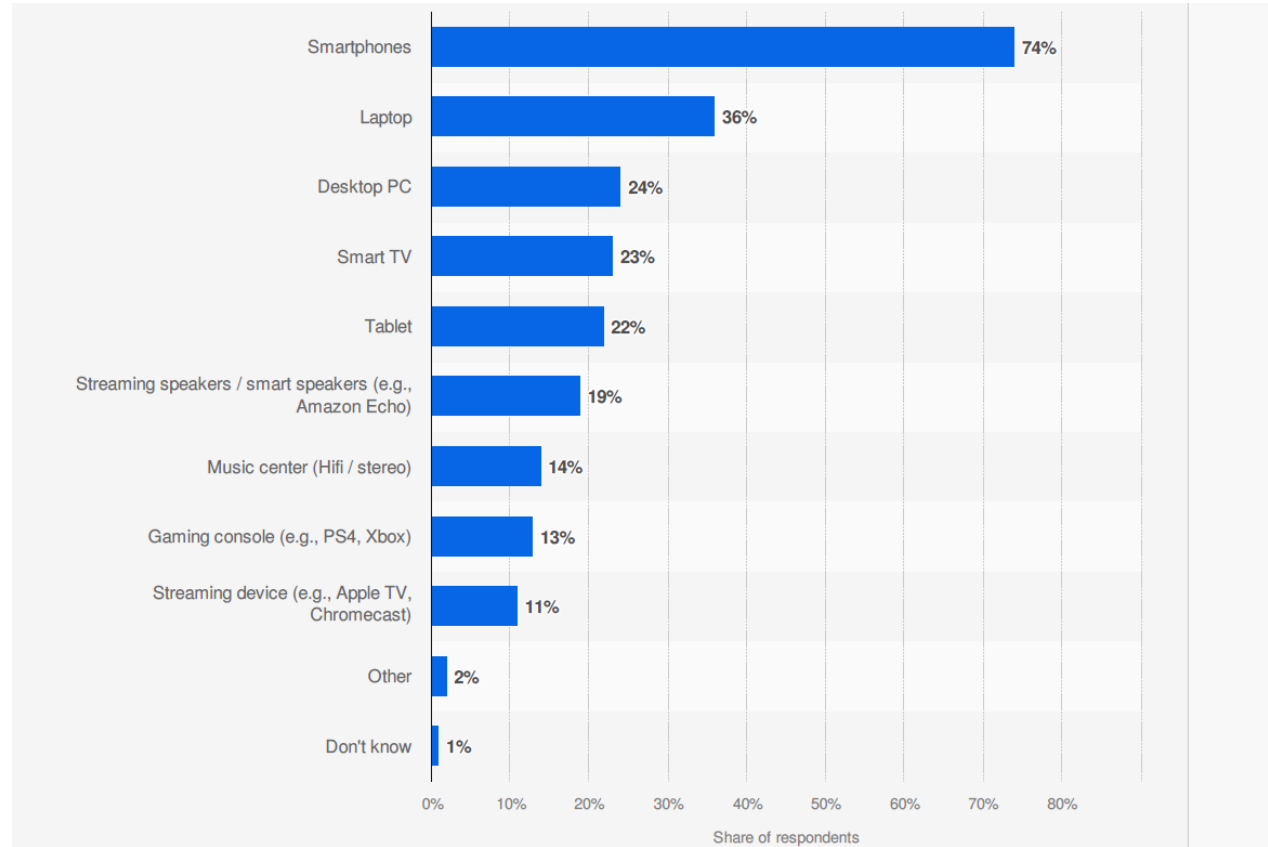


Source: [US: Edison Share of Ear](#)

# Smartphones: the heart of digital audio consumption



Share of digital audio usage by device in France



Source: Statista Consumer Insights – 2024





# Radio in a booming audio landscape



# Radio is everywhere and more than ever the most mobile mass medium

Multiple  
devices



Multiplatform



Live  
and  
on-demand



Hands-free  
and  
eyes-free



Accompanies  
listeners  
throughout  
the day



On-the-go



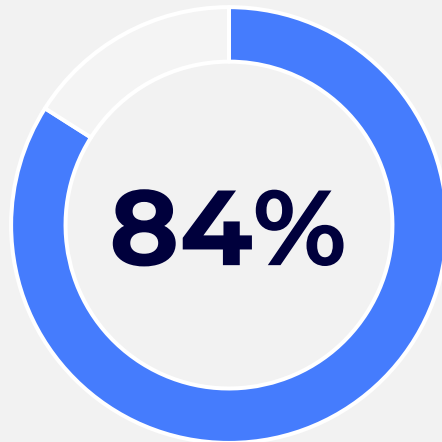
# Radio has an unmatched reach

Radio reaches more than 8 in 10 European citizens every week

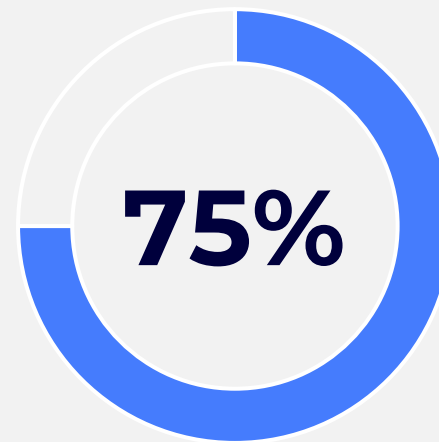


% of population listening to radio every week

European Citizens



European Youth (15-24 yo)

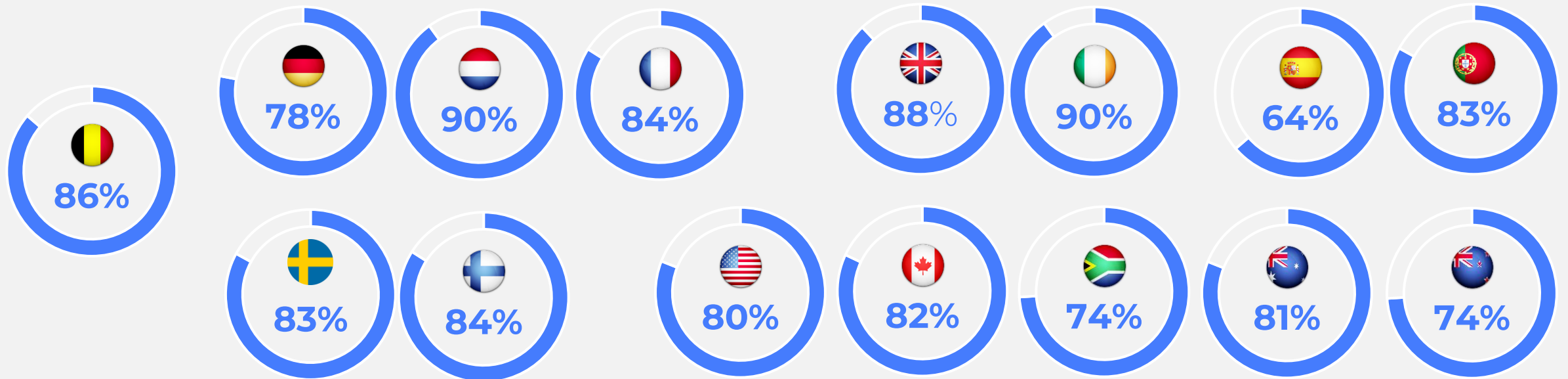


Sources: EBU, 29 markets, 2022 – weekly reach based on 15+ minutes consecutive (reach definitions can vary among countries)

# Radio has an unmatched reach

Across the globe, Radio allows brands to reach millions of potential consumers

% of population listening to radio every week



Sources: : DE: ARD/ZDF-Medienstudie 2024, pop. 14+ | UK: RajarMidas 2024 | IE: Ipsos JNLR 2024 2 Audio Module April 24 – June '24, pop. 15+ | NL: NMO December 2024, pop. 13+ | FR: EAR Insights, Sept-Oct24, pop. 13+ | BE : CIM RAM sept23-aug24, pop. 13+ | ES: EGM 3rd wave 2024 | PT: Markttest Bareme Radio, Jan-Dec 2024, pop. 15+ | FI: National Radio Survey, Finnpanel, Jan-Nov 2024, pop. 9+ | US: Nielsen Radar 162 2024, pop. 12+ | CA: Numeris PPM Total Meter CTRL, Fall 2024, pop. 18+ | ZA: BRC RAM data for Jan 22 - Dec 23, pop. 15+ | AU: The Infinite Dial 2024, total pop. 12+ | NZ: The Infinite Dial 2023, total pop. 16+

# Radio has an unmatched reach

AM/FM radio is America's number one mass reach media



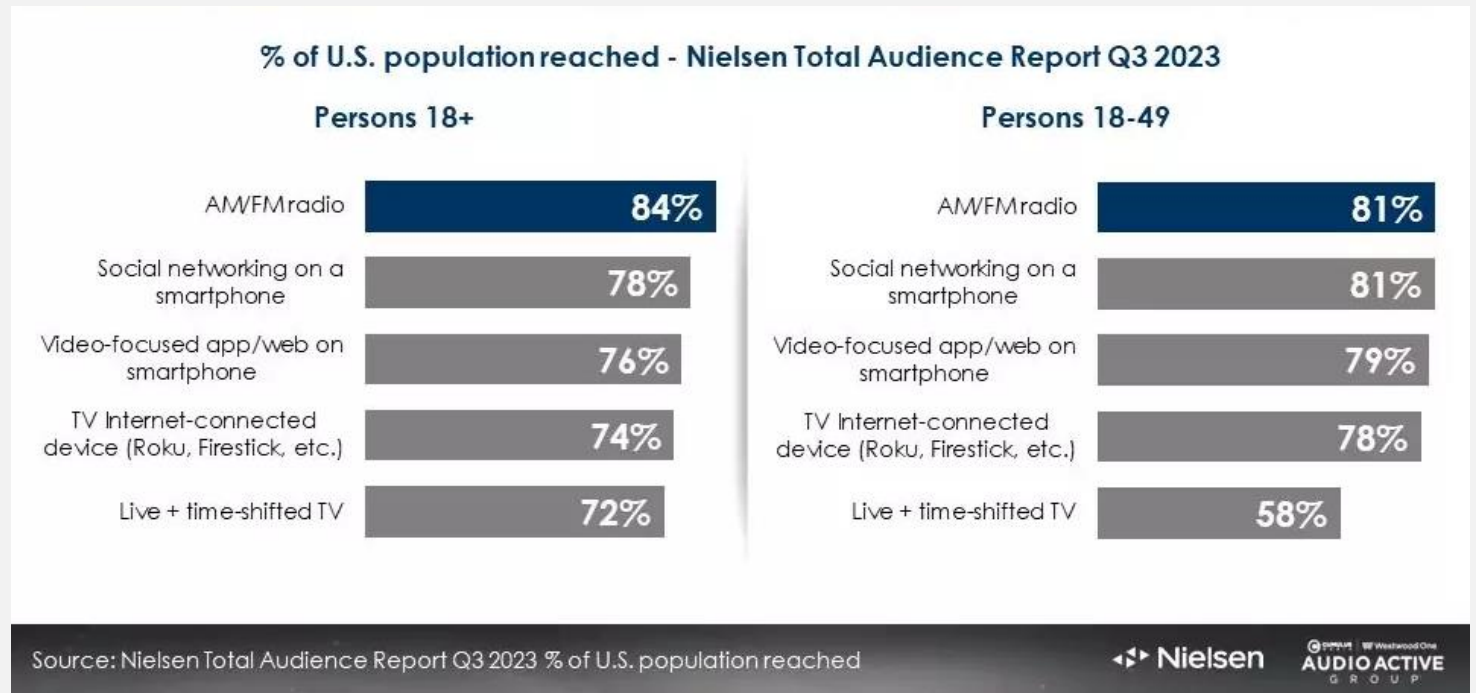
Home > News > Headlines > Nielsen: Radio Is America's Number One Mass Reach Medium

News Headlines

## Nielsen: Radio Is America's Number One Mass Reach Medium

By Cameron Coats - March 5, 2024

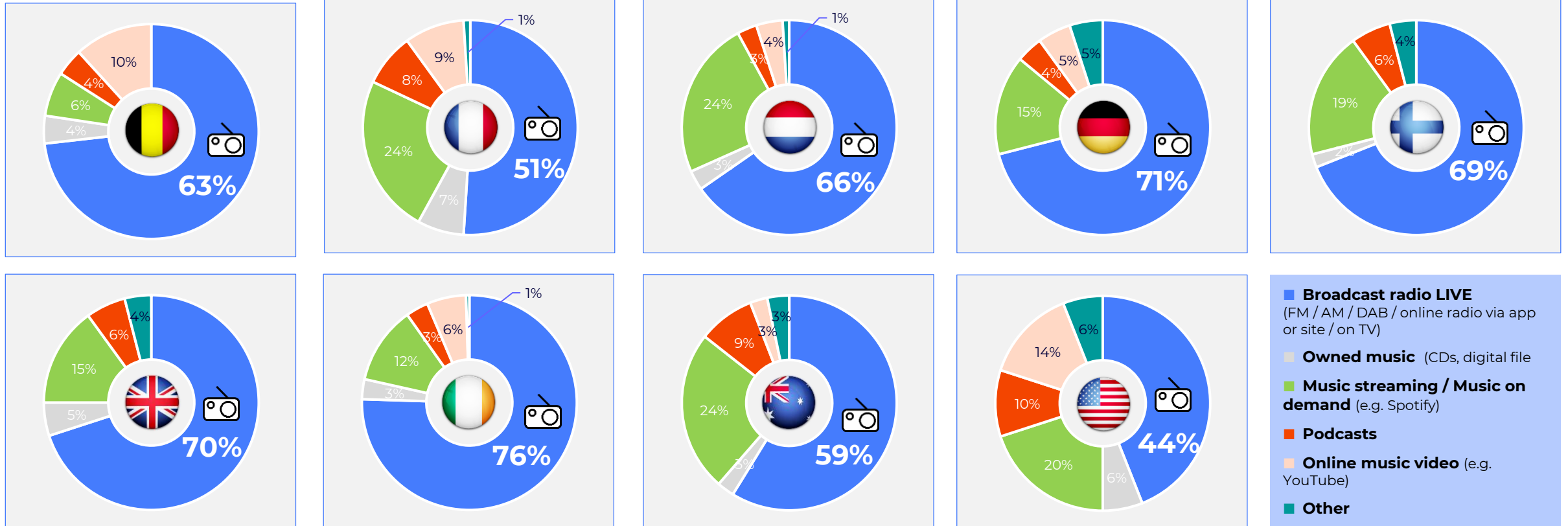
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Sources: : Nielsen Total Audienc Report 2023

# Radio dominates the audio consumption

Radio captures the largest share of listening time across platforms

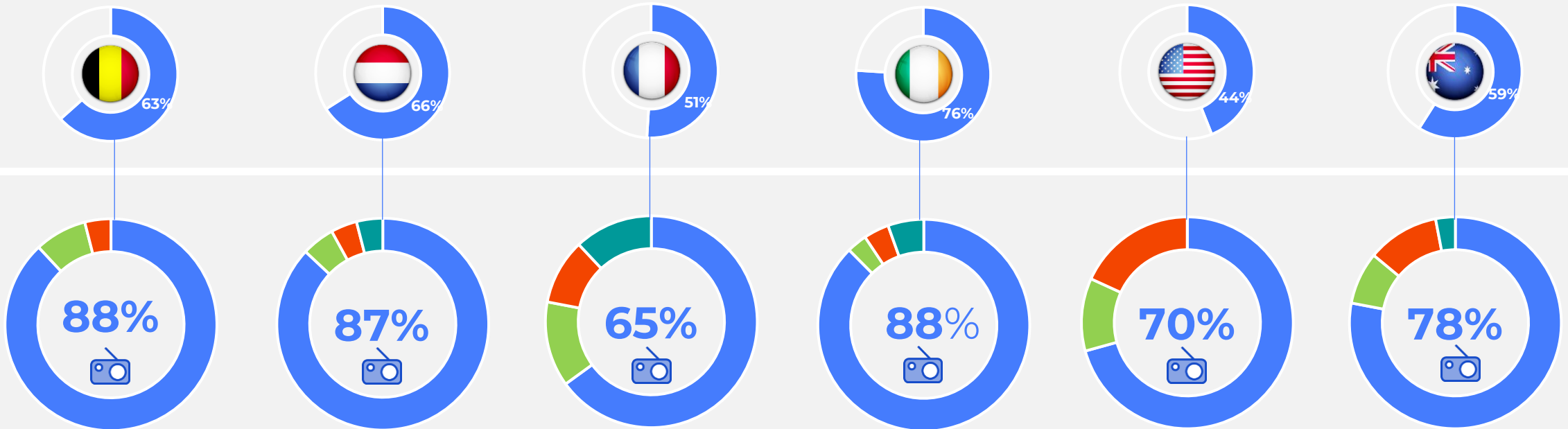


- **Broadcast radio LIVE**  
(FM / AM / DAB / online radio via app or site / on TV)
- **Owned music** (CDs, digital file)
- **Music streaming / Music on demand** (e.g. Spotify)
- **Podcasts**
- **Online music video** (e.g. YouTube)
- **Other**

Sources: IE: Ipsos JNLR 2024 2 Audio Module (April 24 – June '24), pop. 15+ | AU: GFK Share of Audio 2022, Metro, pop. 10+ | BE: CIM Audio Time 2025, pop. 12+ | NL: NMO December 2024, pop. 13+ | DE: Medienstudie 2024, pop. 14+ | UK: RajarMidas 2024 | FI: National Radio Survey, Finnpanel, Jan-Nov 2024, population 9+ | FR: Mediametrie Global Audio 2024, pop. 15-80 y.o. | US: Edison Share of Ear 2024, pop. 13+ |

# Radio is the biggest part of the ad-supported audio landscape and is the only format that offers scale for brands to reach their consumers within the audio landscape

Daily share of time spent with RADIO within total audio listening

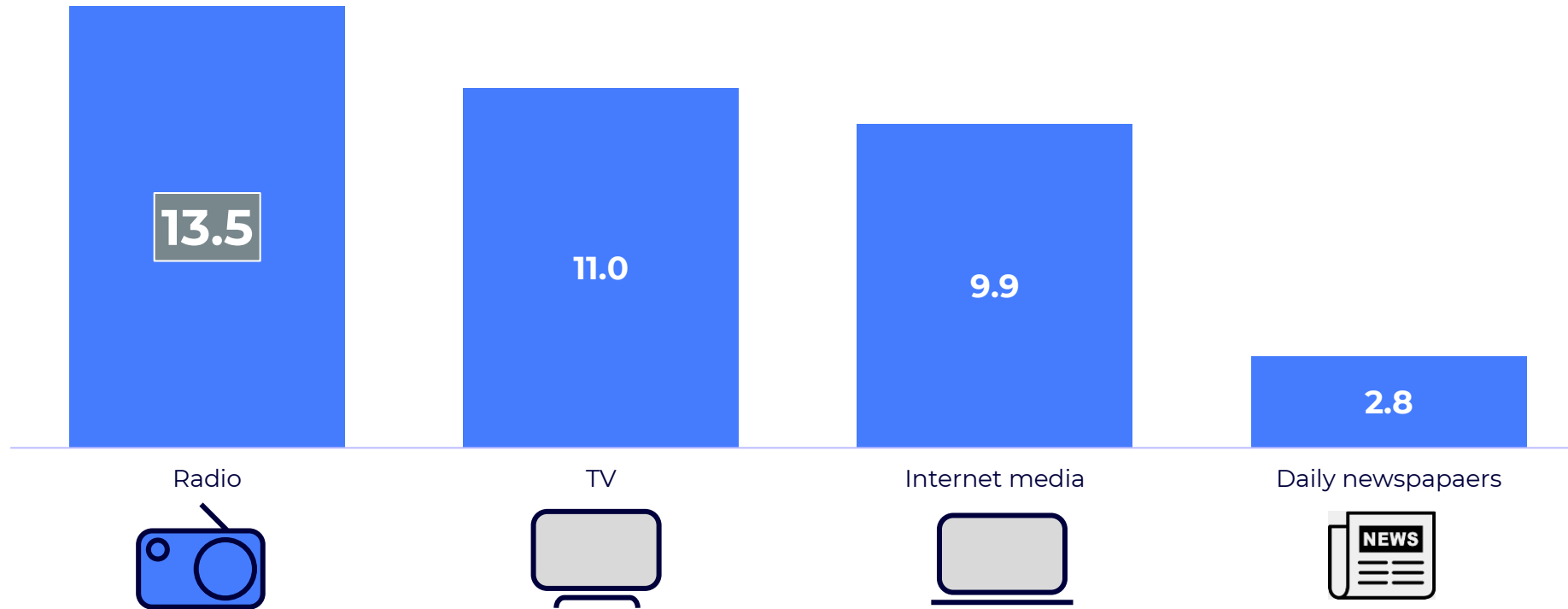


Daily share of time spent with LIVE RADIO within ad-supported audio listening

■ Broadcast radio LIVE (FM / AM / DAB / online radio via app or site / on TV)
 ■ Music streaming / Music on demand (e.g. Spotify)
 ■ Podcasts
 ■ Other

# Radio dominates the media consumption

Average media usage in Germany (years)\*



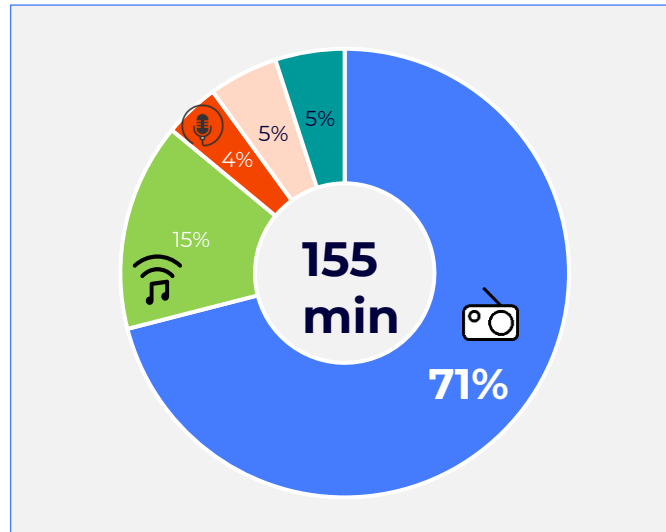
Sources: Germany: \*70 yrs of age with media use, minus 8h of sleep. Source: ma 2022 Audio II for radio total (incl. commercial-free programs) and TV, daily listening time Mon-Sun in minutes; Newspaper: ZMG Newspaper Qualities 2019/2022, 14; Online: ARD/ZDF online study Media Internet usage yesterday 2021, Mon-Sat, 14+.



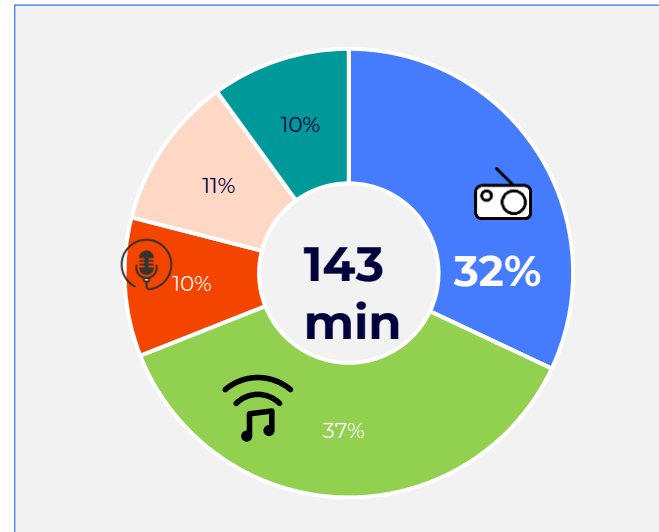
# Young people still listen to radio but prefer streaming music



Total 14+



Total 14-29 yo



Sources: DE: Medienstudie 2024 | US: Edison Share of Ear 2024

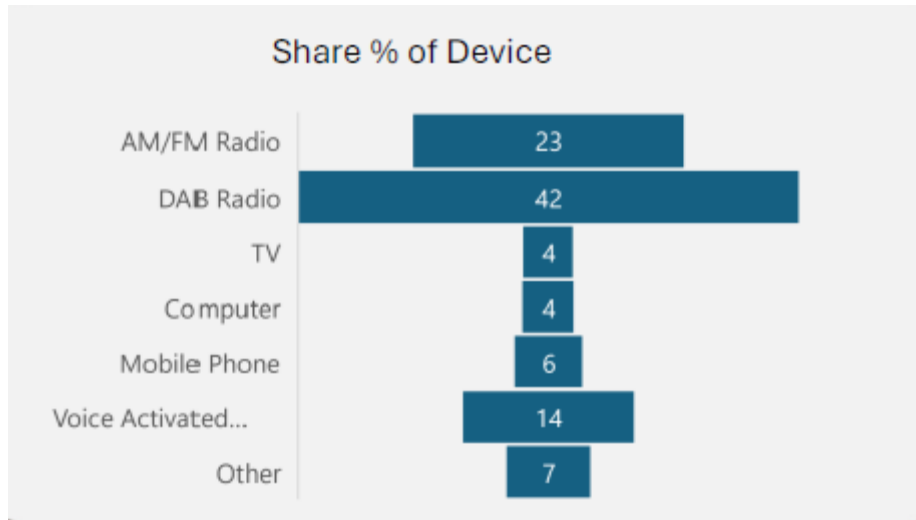
# Radio is growing its digital footprint



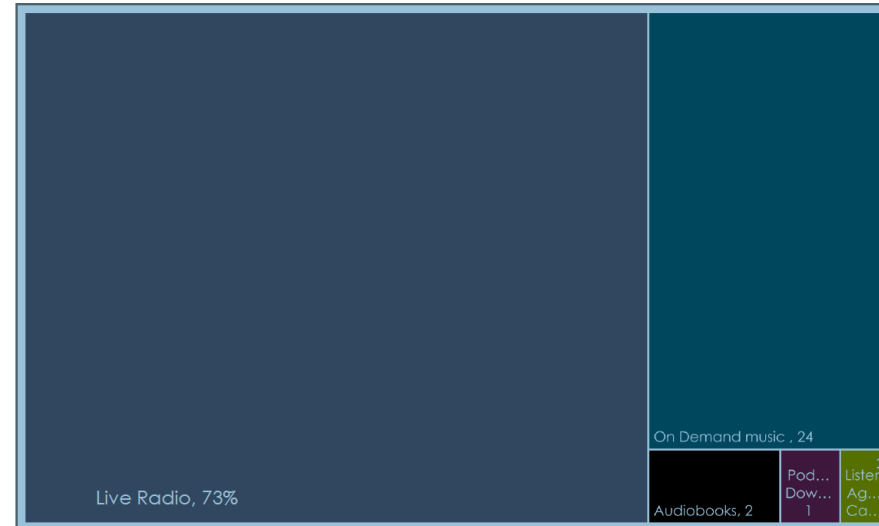
## 73% of listening is digital

People are listening to more radio in new ways. Better access to DAB, easier listening on phones and the rise in smart speakers all mean listening to radio has never been easier.

Source: RAJAR



SMART SPEAKER (VOICE ACTIVATED) - SHARE %



Sources: |UK: RajarMidas 2024

# Radio: the audio leader



**Dominating  
audio consumption and  
ad-supported listening**



**Digital**




**Unmatched reach**



**Most mobile**



# International trade body of multiplatform TV and audio businesses

A decorative graphic on the left side of the slide, consisting of a white outline of a stylized 'e' or a similar shape.

**180+**  
members

**45+**  
markets

**2000+**  
network of senior  
executives