

# AUDIO IN CARS

European Broadcasting Union – Media Intelligence Service

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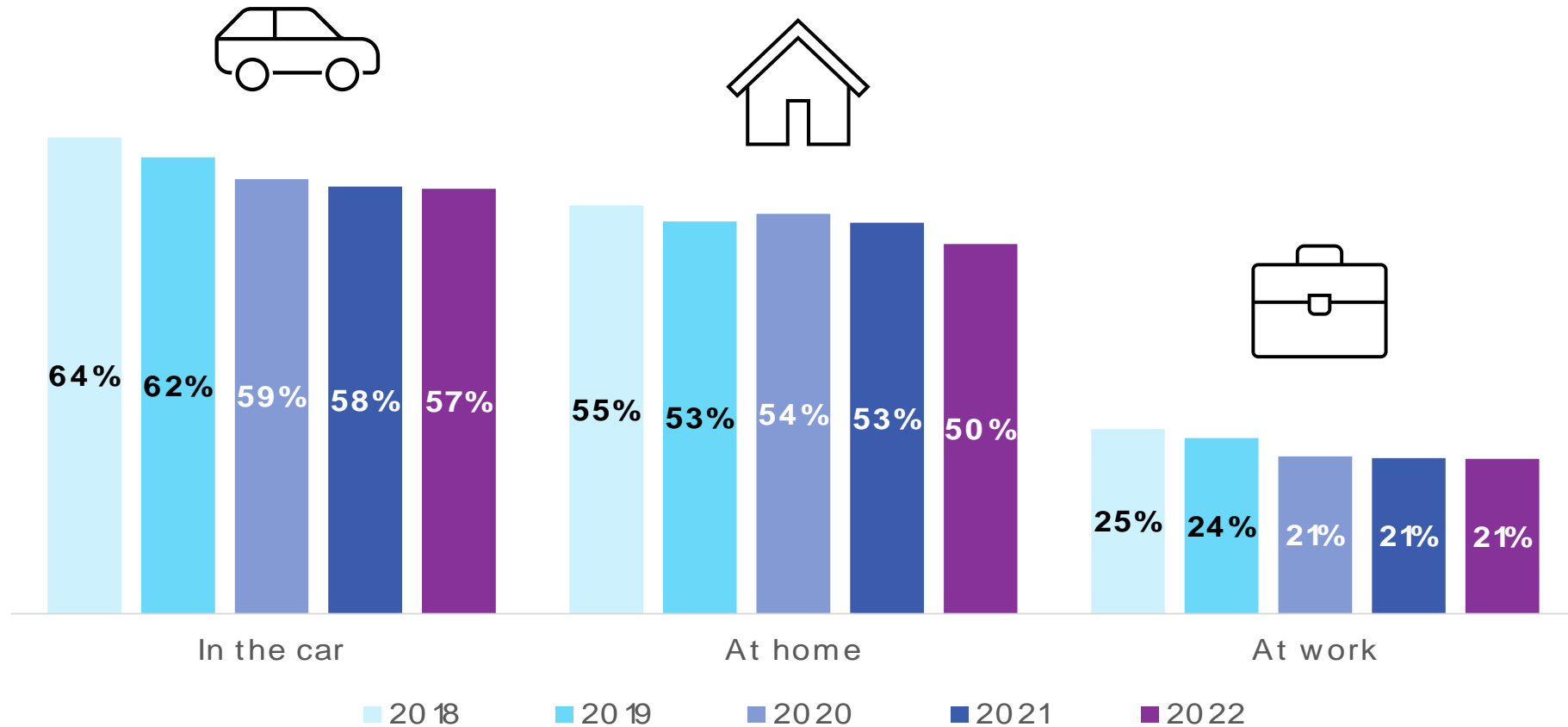




# In-car radio listening

# RADIO REACHES MORE PEOPLE IN THE CAR THAN AT HOME

Radio reach by location  
Averaged across 11 European markets, in Reach %, 2018 – 2022



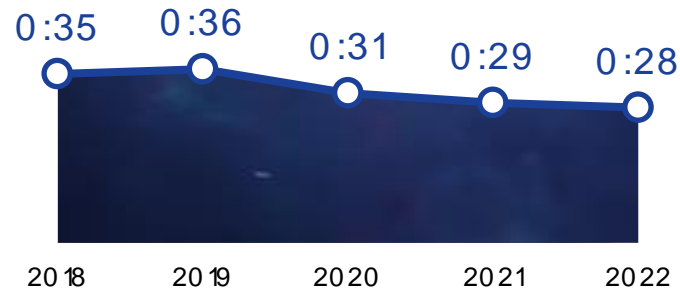
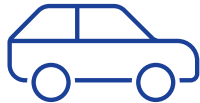
Notes: Reach definitions vary among countries. Markets included – reach definition: Belgium Flemish – weekly reach, Estonia – weekly, France – weekly, Germany – daily, Italy – daily, Lithuania – weekly, Netherlands – daily, Poland – daily, Portugal – daily, Spain – daily and United Kingdom – weekly  
Average of 11 EBU markets. Evolution provided on the same scope.

Sources: EBU MIS based on Members' data  
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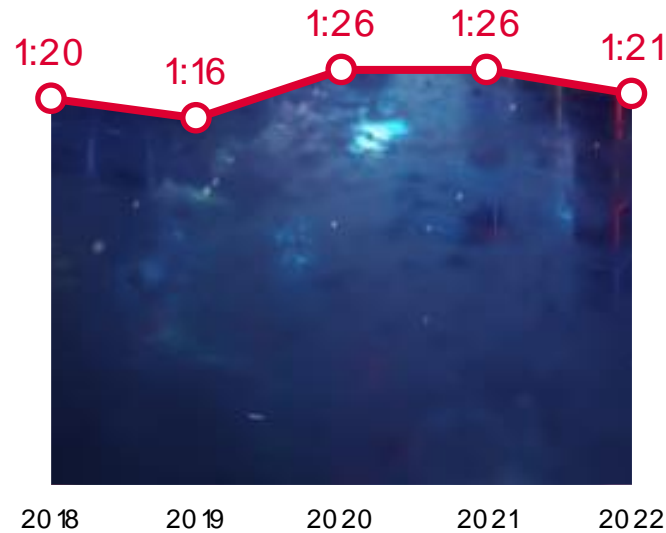
# ON AVERAGE IN 2022, PEOPLE LISTENED TO 28 MINUTES OF RADIO EVERY DAY IN THE CAR

Daily radio listening time by location  
Averaged across 7 European markets, in hours and minutes (h:mm), 2018 - 2022

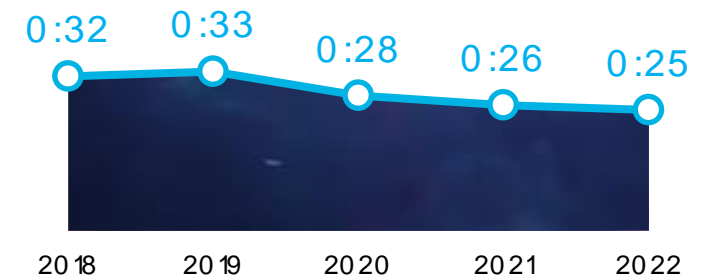
## In the car



## At home



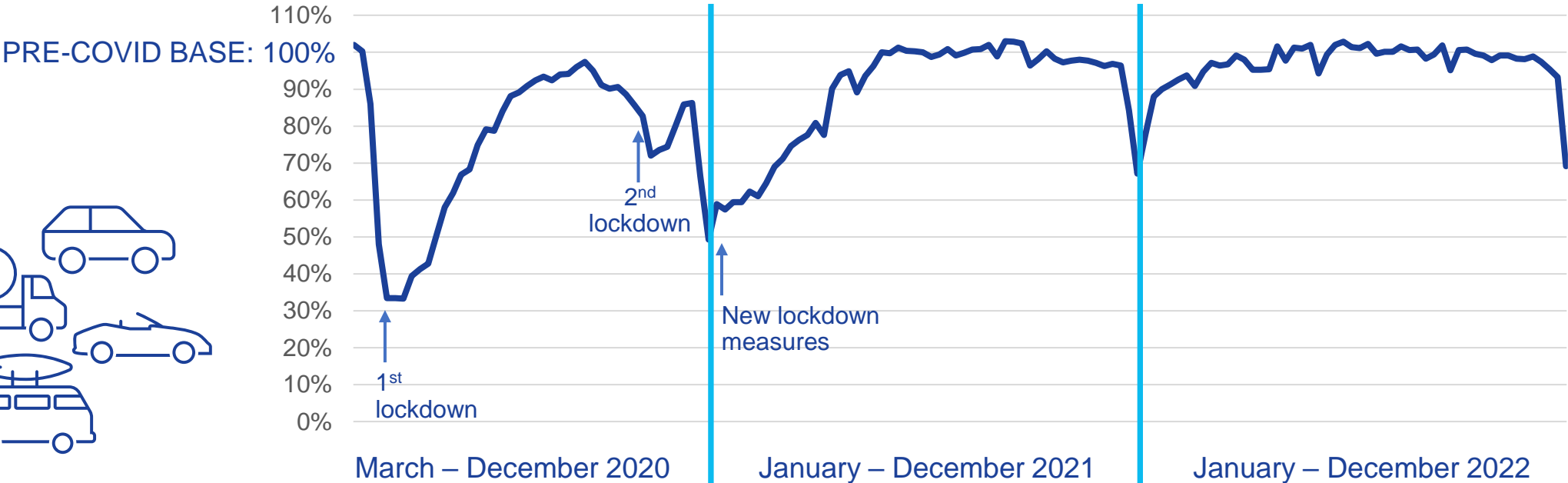
## At work



Notes: Average of 7 EBU markets. Evolution provided on the same scope.  
Markets included: Belgium Flemish, Estonia, Finland, France, Netherlands, Spain and United Kingdom  
Sources: EBU MIS based on Members' data  
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# IN-CAR RADIO LISTENING DECLINE CAN ONLY PARTIALLY BE EXPLAINED BY THE DECREASE IN CAR USAGE

Daily usage of motor vehicles in Great Britain  
 Index – Base 100% in Week 1 of February 2020  
 Evolution: March 2020 - December 2022



Average per studied period:

72%

85%

93%

Notes: Percentage of the equivalent day in the first week of February 2020. 100% would mean that traffic is the same as the equivalent day in the first week of February 2020

Source: Road Traffic Estimates in Great Britain. Department for Transport – Government of the United Kingdom

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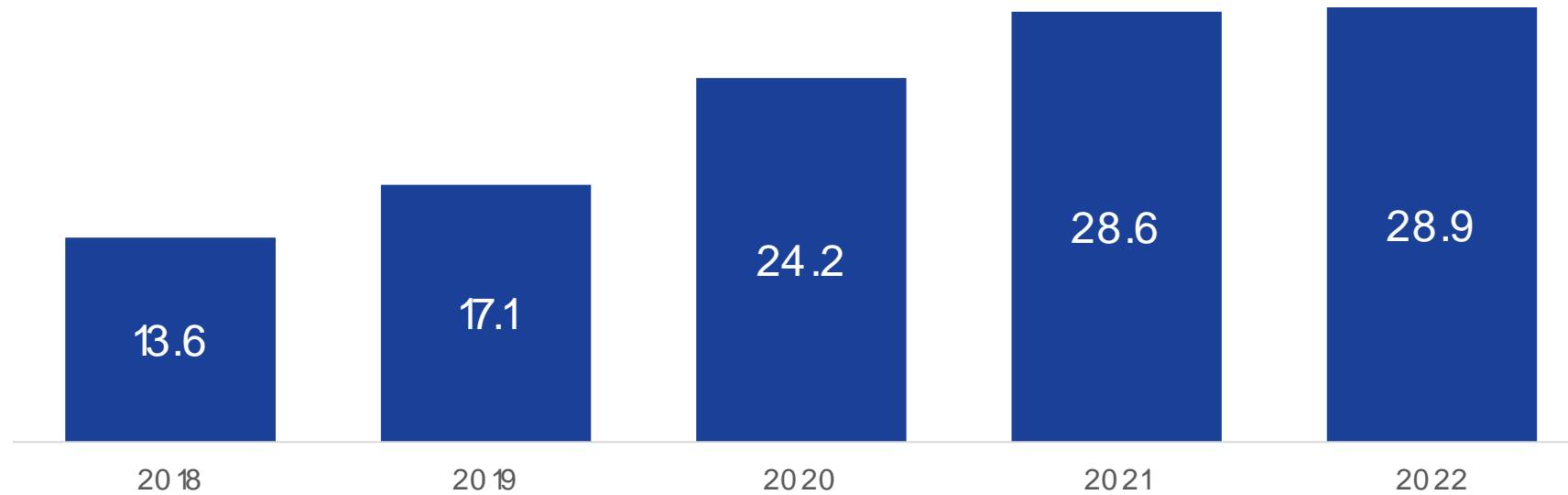


# **In-car online audio listening**

# IN GERMANY, THE NUMBER OF IN-CAR ONLINE-AUDIO USERS HAS MORE THAN DOUBLED IN 5 YEARS



In-car online-audio users  
individuals 14+, Germany, 2018-2022

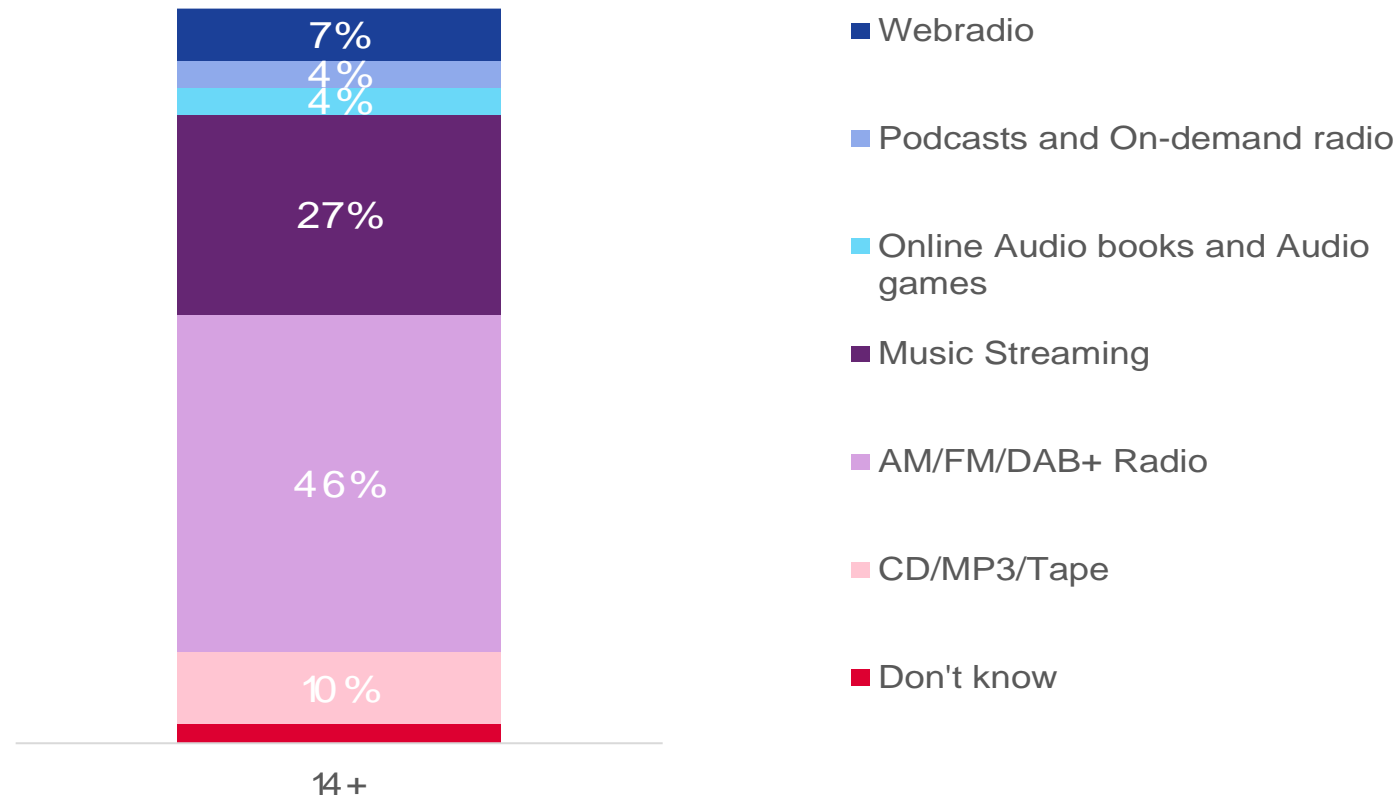


In million of in-car  
online audio users

# EVEN AMONG IN-CAR ONLINE AUDIO USERS, RADIO DOMINATES, BUT MUSIC STREAMING IS ALSO IMPORTANT



Most used content in the car  
Among in-car online audio users, Germany, 2021



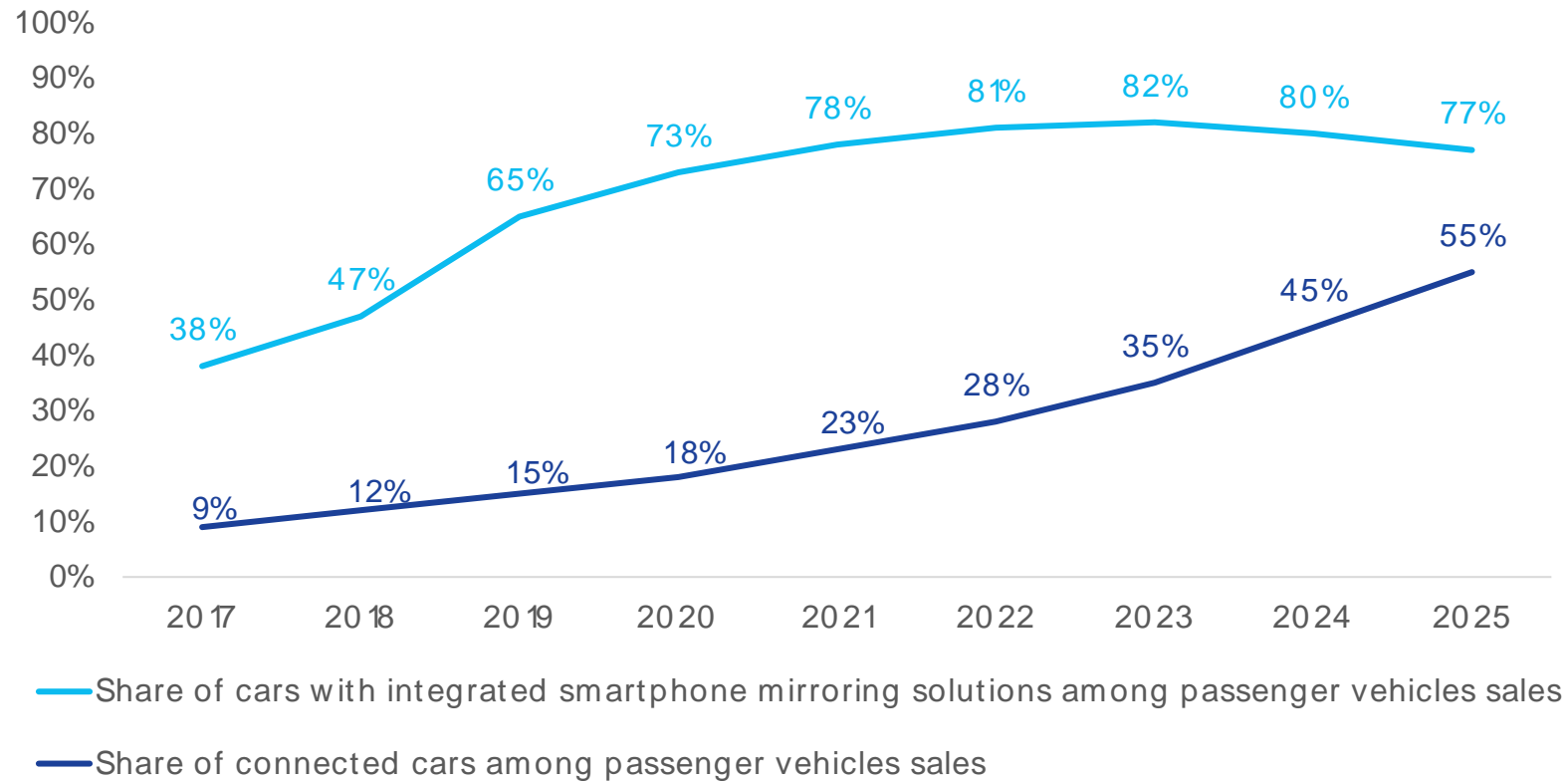




# Connectivity in the car

# MIRRORING SOLUTIONS ARE STANDARD IN MOST SOLD CARS

Historical and projection data about the share of new vehicle sales with:  
- smartphone mirroring solutions  
- in-built 4G or 5G enabled for Infotainment purposes.  
In %, UK, 2020



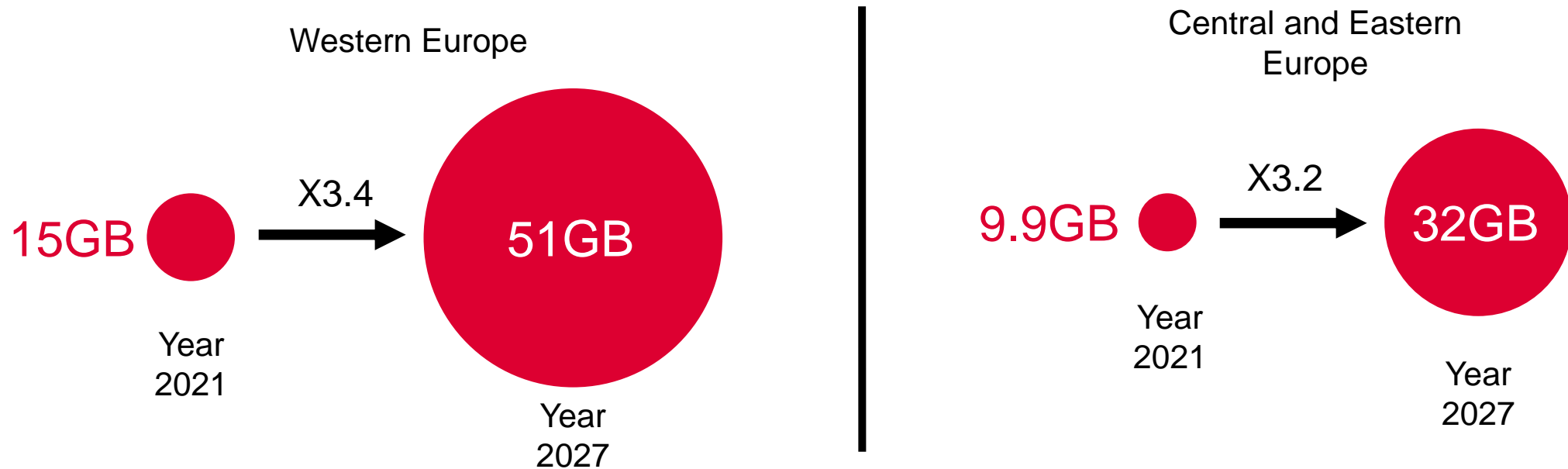
Notes: Cars with smartphone mirroring solutions = Cars which allow users to access mirroring solutions (such as CarPlay and Android Auto) via Bluetooth or cable and using their mobile data connection

Sources: EBU MIS based on Futuresource consulting "Trends in Audio and Radio Consumption in the UK" February 2020

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# IN EUROPE, MOBILE DATA TRAFFIC PER SMARTPHONE IS EXPECTED TO TRIPLE BY 2027

Mobile data traffic per smartphone per month  
In Gigabyte, per region, 2021 and 2027 forecast



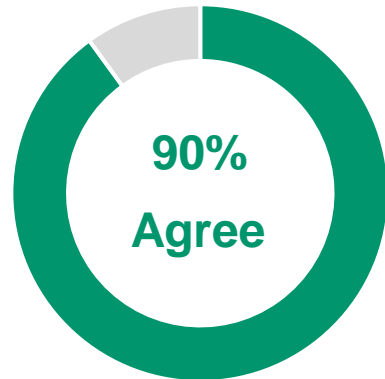


# What people want in the car

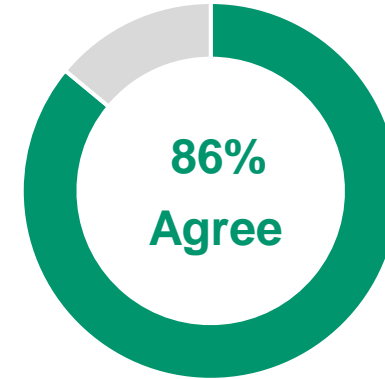
# IN-CAR RADIO LISTENERS ARE ATTACHED TO THEIR LISTENING HABITS

Average % “strongly” or “somewhat” agree

“Radio should be standard in every car/vehicle”



“It is easier to listen to radio in a car/vehicle than to listen to other types of audio sources”



Notes: “How much do you agree with the following statements about listening to traditional “over-the-air” radio in a car/vehicle?”

Among in-car radio listeners 18+, Australia, France, Germany, Italy, UK, US, September 2021

Base: Typically listen to radio in a car/vehicle. Averaged across 6 markets: each country has weight of 1

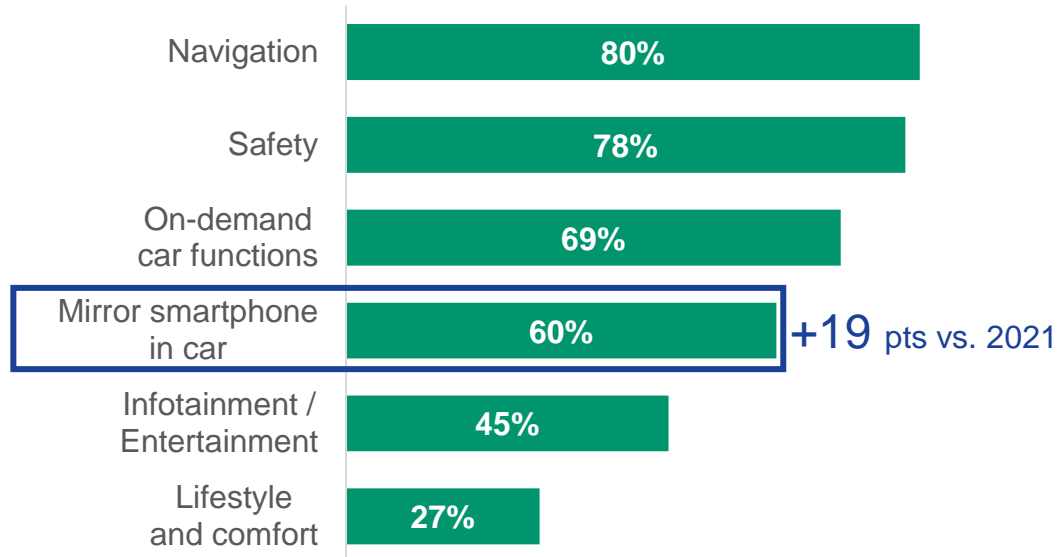
Sources: EBU MIS based on 2021 Car Buyers Survey commissioned by World DAB, in partnership with Radioplayer, conducted by Edison Research

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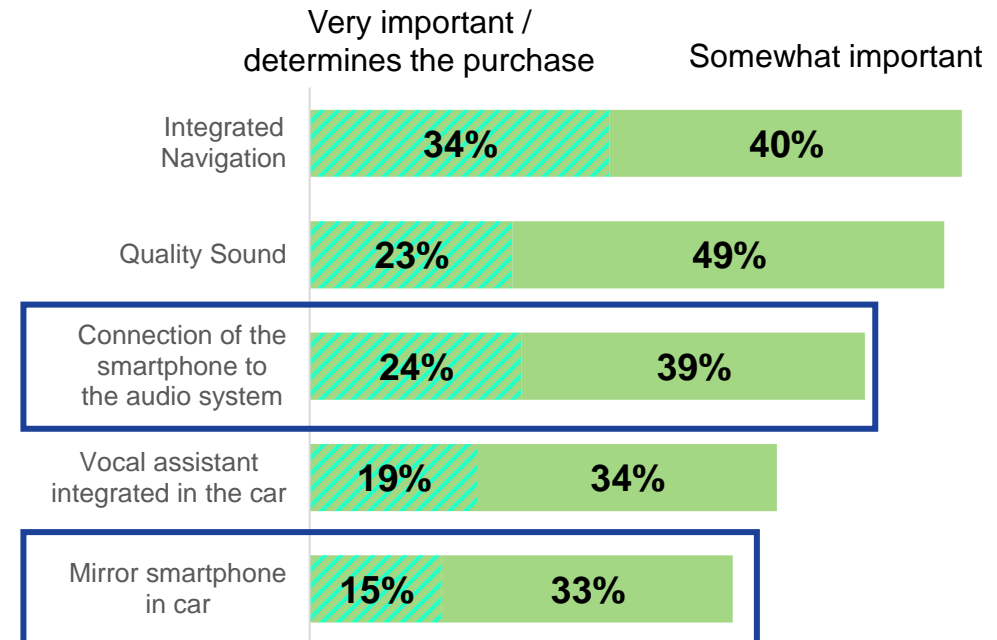
# MIRRORING SOLUTIONS ARE WIDELY CONSIDERED AS AN IMPORTANT FEATURE



“Which connected service categories are particularly important to you?”,  
Among individuals 18+, % of yes, Germany, 2023



Importance of each feature, among respondents who intend to buy a vehicle within 5 years, France, 2021



Notes: Base: 2000 French drivers aged 18+

Sources: EBU MIS based on “Digital Auto Report 2021” PwCAutofacts Strategy& and BVA quantitative study for Radio France

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# KEY TAKEAWAYS



Audience behaviours are changing:

- The car is key for radio. The consumption is still massive but listening time has slightly decreased.
- In-car online audio listening gains ground. It is mainly driven by music streaming.



Connectivity in the car is becoming easier:

- Mobile data limit will no longer be a barrier to accessing online audio content.
- in-built 4G or 5G is expected to become standard in new vehicle sales.



People want radio and choice:

- Audiences are attached to the radio for its unique experience and its ease of use.
- The ability to connect the smartphone to the car is widely wanted for accessing music streaming, podcast, catch-up radio and web radio.

# MEDIA INTELLIGENCE SERVICE

Providing reliable market data, trustworthy  
analysis and relevant arguments

Thank you!

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