





Radio: A Love Story


Commissioned by:





In Partnership with:



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2021 Car Buyers Survey

Online interviews conducted in Australia, France, Germany, Italy, UK, U.S. in September 2021

(1000+ respondents per Country) Adults age 18+ who purchased/leased a vehicle within the last three years or plan to purchase/lease within the next year qualified.

Interviews conducted 1 September – 21 September, 2021

Online interviews conducted in France, Germany, and UK in May 2023 (2422+ total respondents)

Adults age 18+ who purchased/leased a vehicle within the last three years or plan to purchase/lease within the next year qualified. Each country's data were weighted to reflect the gender and age of its population.

Thirty-six in-car interviews with radio listeners in France, Germany and the UK.

Adults who purchased/leased a vehicle within the last three years qualified for the study. There was an even number of budget, mid-range and luxury car owners.



Dashboard Dialogue: Car owners on radio accessibility






U.S. National Online Survey

National U.S. Survey

- N=1,168 online interviews of persons age 13+
- Conducted in June 2023
- Weighted to The Infinite Dial, a nationally representative study

Share of Ear U.S.

- 4000+ respondents, conducted Q2 2023 - Q1 2024
- National sample ages 13 and older
- Online and offline
 - Tracked since 2014
- Offered in English and Spanish





Radio: A Love Story

Best believe I'm still bejeweled.
When I walk in the room
I can still make the whole place shimmer

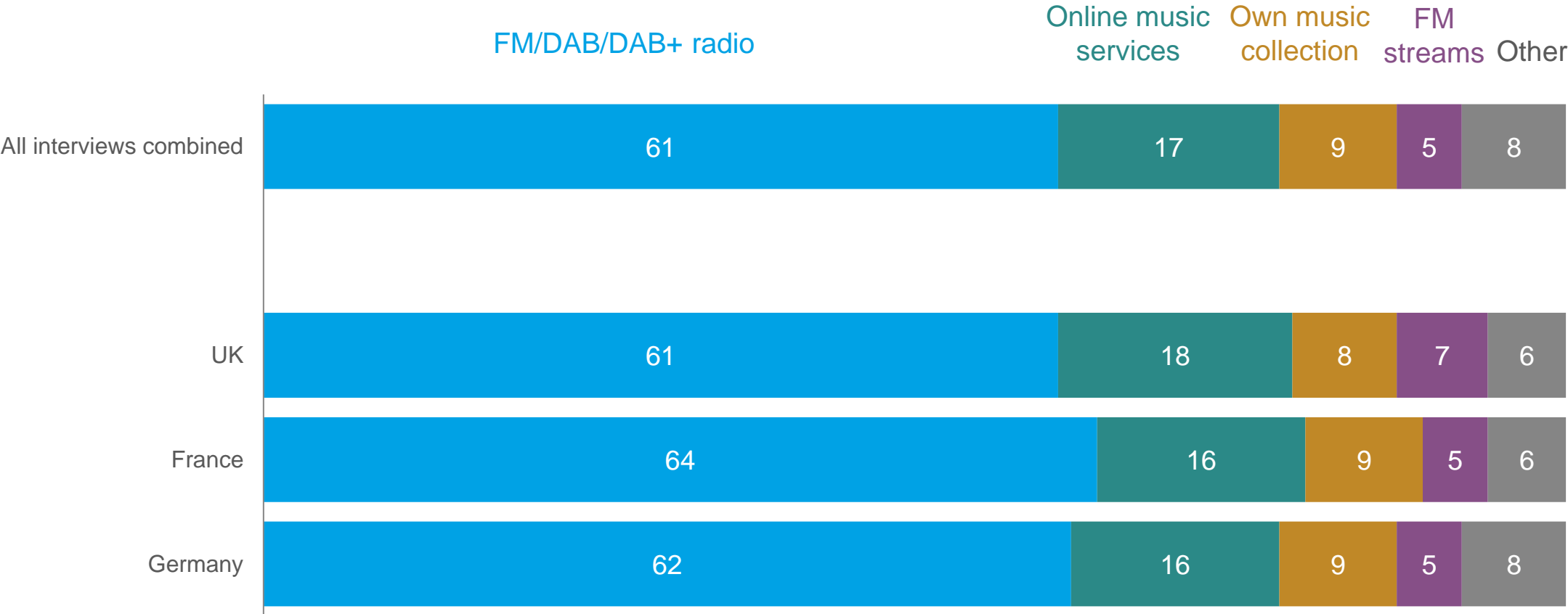
-Taylor Swift



KEY TAKEAWAY #1:

Radio is the most listened to audio platform in the car

Which do you typically listen to most often in a car/vehicle?



Base: Typically spend any time in a car/vehicle

Source: Dashboard Dialogue Study 2023: Online survey of recent/prospective car buyers in UK, France, and Germany

UK, France & Germany:

86%

of recent/prospective car buyers
listened to FM or DAB/DAB+ radio
in a car/vehicle in the last week

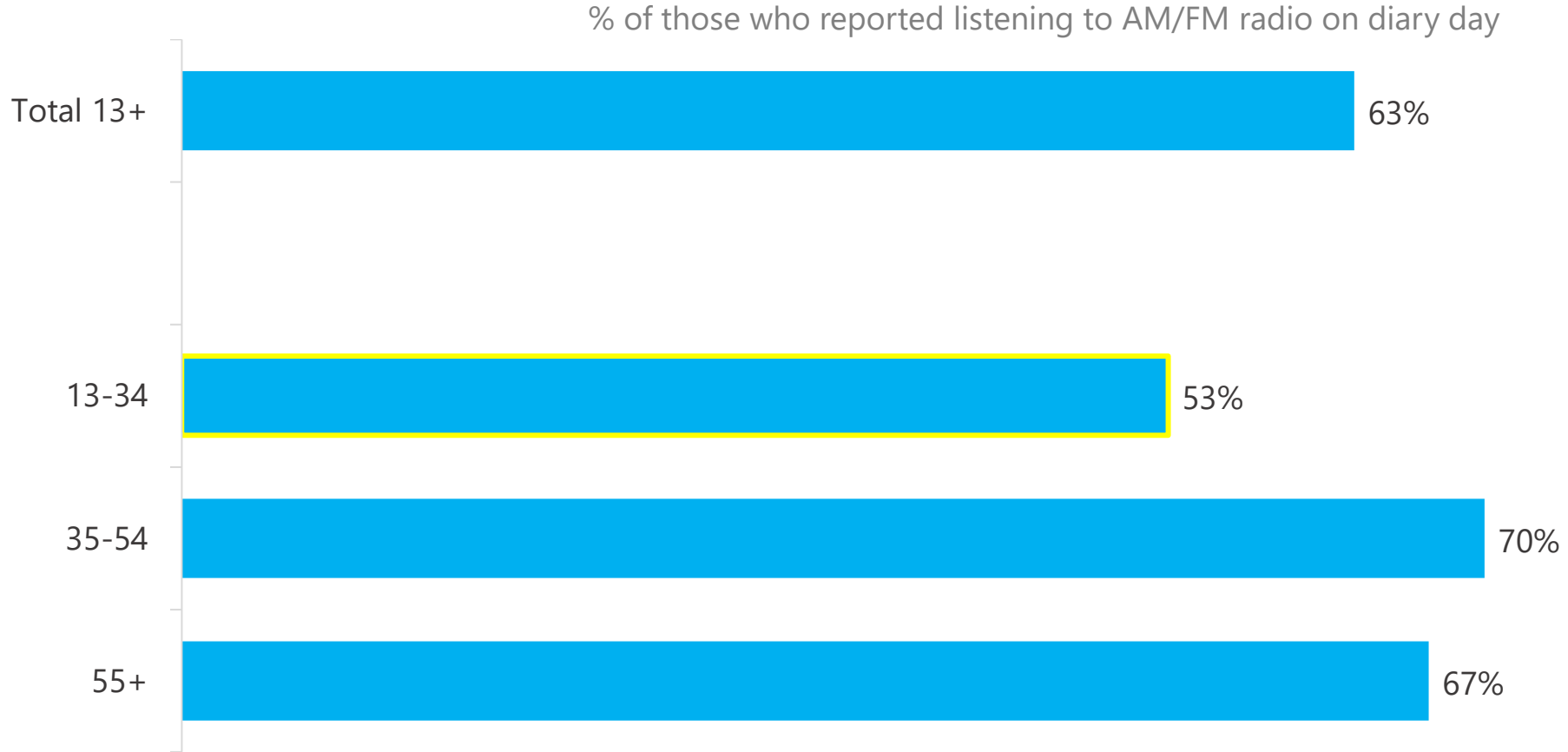
71% listened to FM radio (#1 in reach)

45% listened to DAB/DAB+ radio (tied for #2 in reach)

Source: Dashboard Dialogue Study 2023: Online survey of recent/prospective car buyers in the UK, France, and Germany

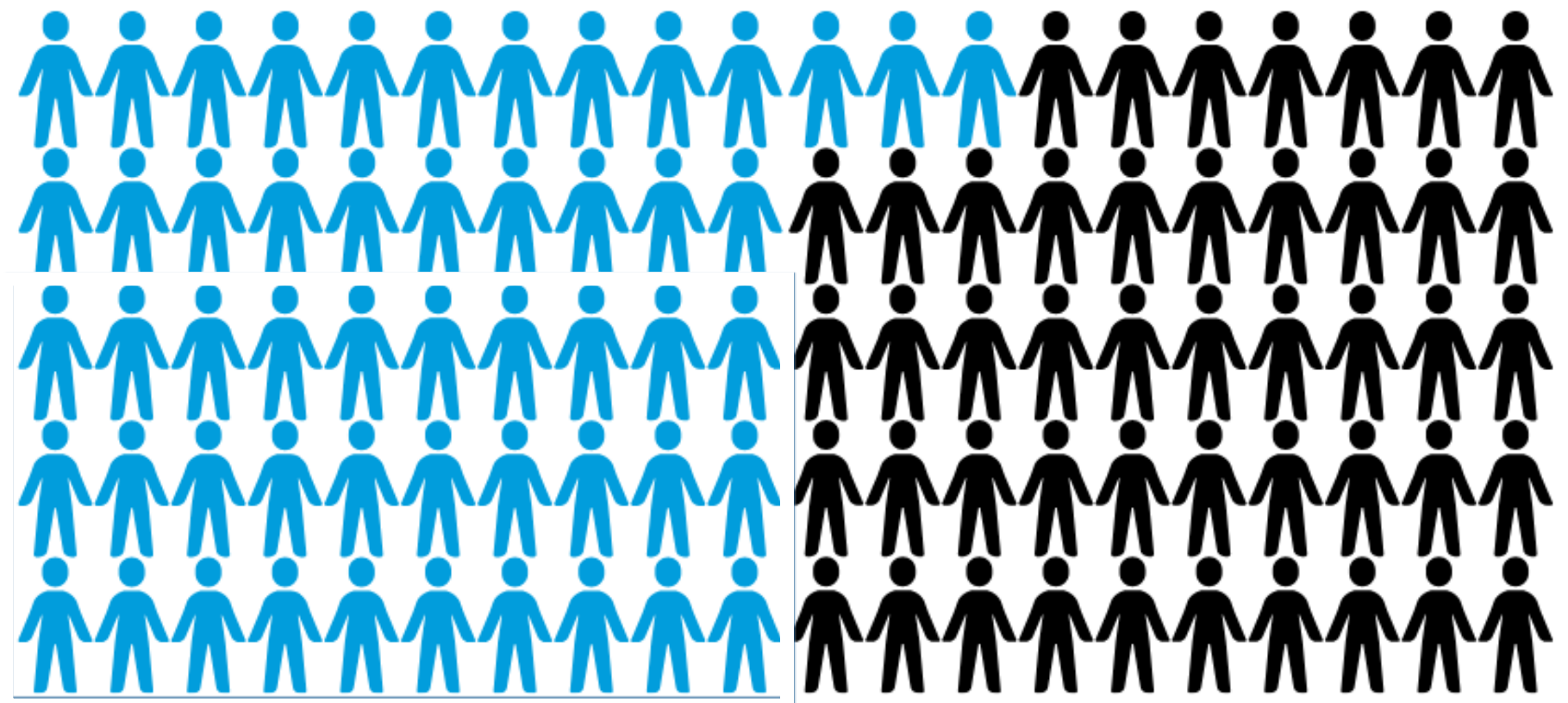
Daily Reach of AM/FM Radio (OTA and Radio Streams)

U.S. Population 13+



Young Adult Listeners in the U.S. Are Reached by Radio

53% of 13-34 year olds listen to radio each day



Among the 13-34s who listen to radio,
56% listen **only** in the car

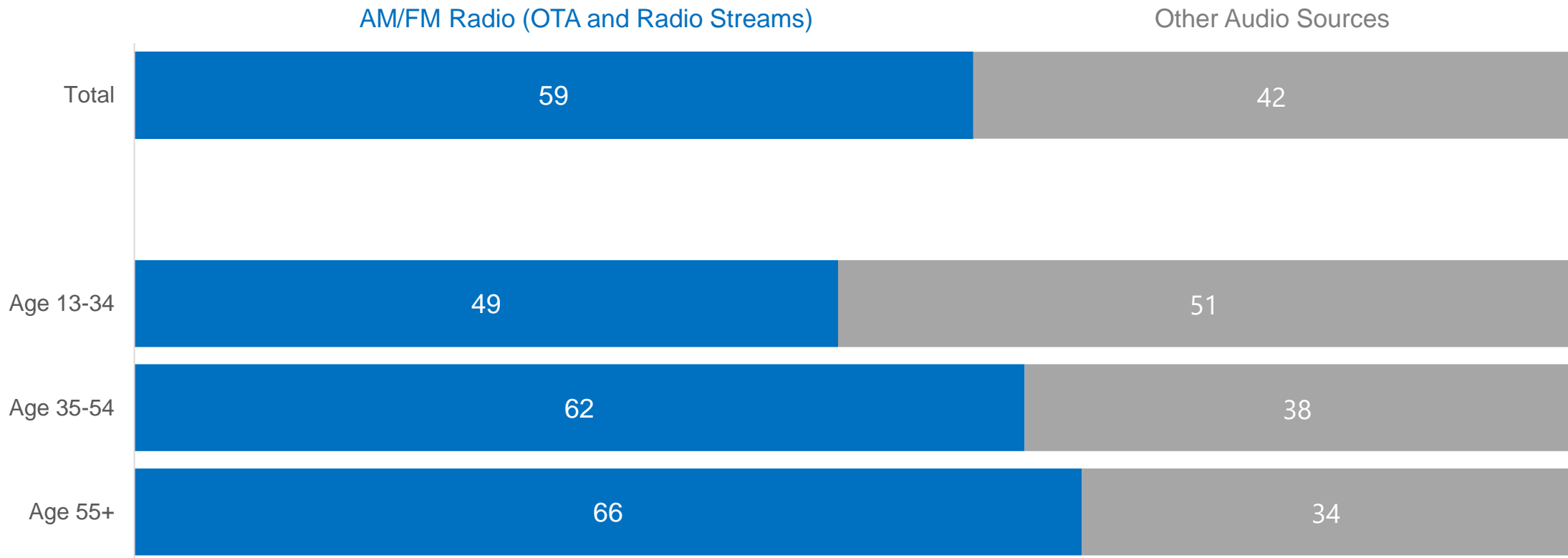


KEY TAKEAWAY #1:

Radio is the most listened to audio platform in the car

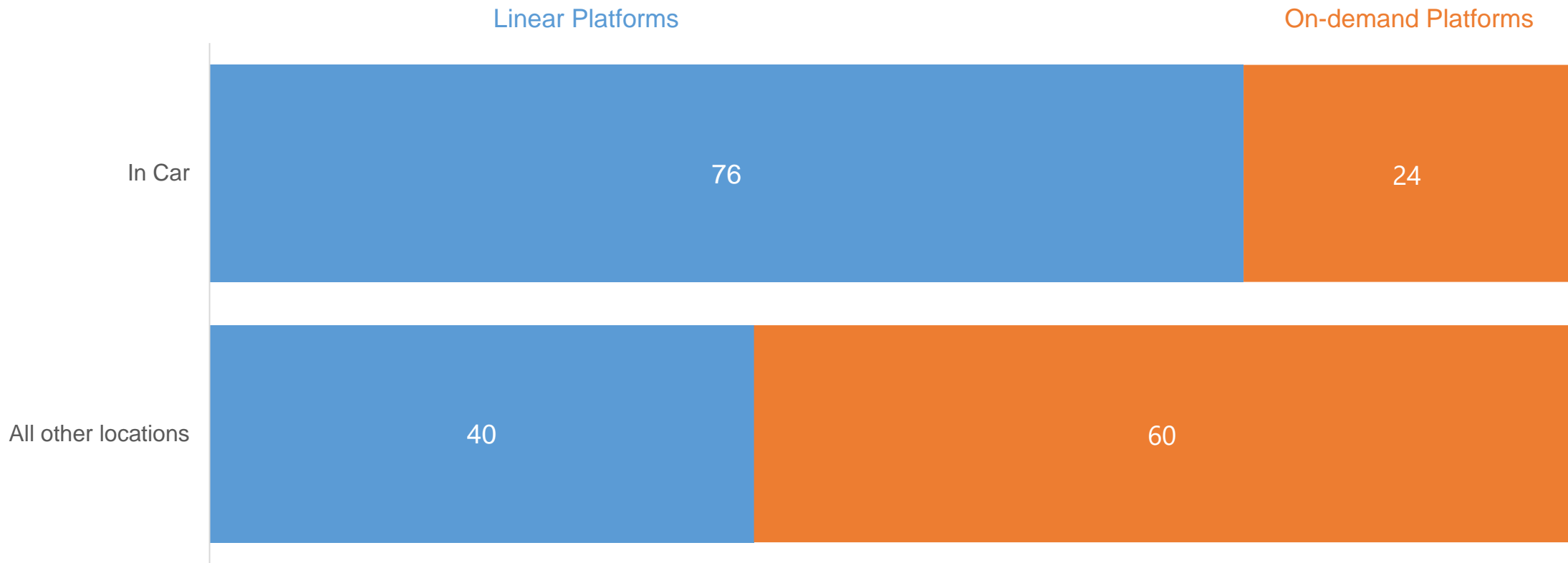
Share of Audio Listening Time in a Car/Truck by Platform

U.S. Population 13+



Share of All Audio Listening

U.S. Population 13+



Linear platforms include: OTA radio, radio streams, radio services, etc.
On-demand platforms include: podcasts, owned music, paid streaming services, etc.

Share of Audio Listening Time in a Car/Truck by vehicle model year

U.S. Population 13+

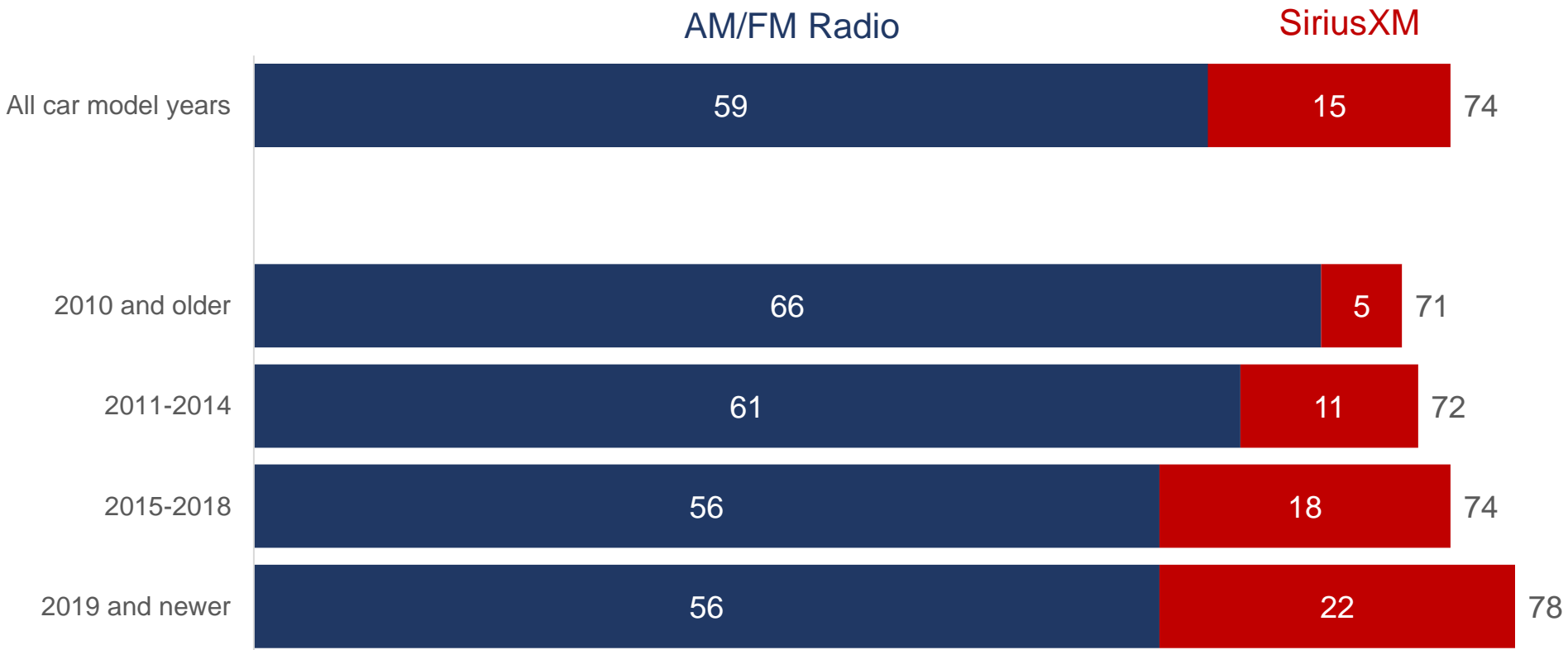
AM/FM Radio includes over the air and radio streams



Share of Audio Listening Time in a Car/Truck by vehicle model year

U.S. Population 13+

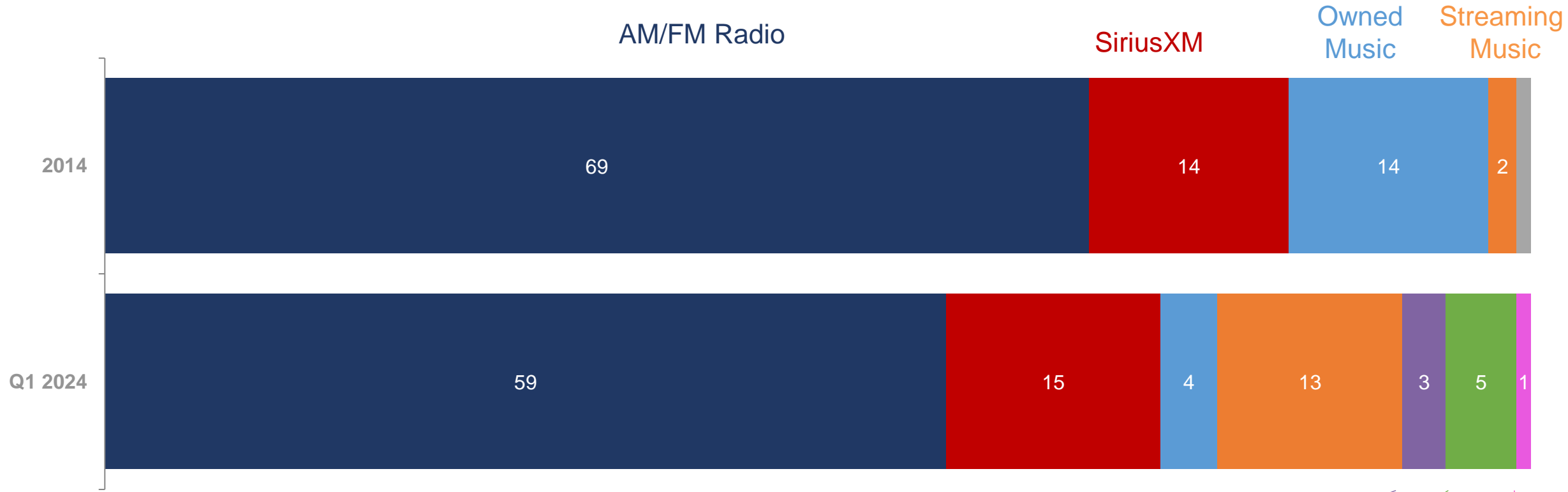
AM/FM Radio includes over the air and radio streams



Share of Audio Listening Time in a Car/Truck

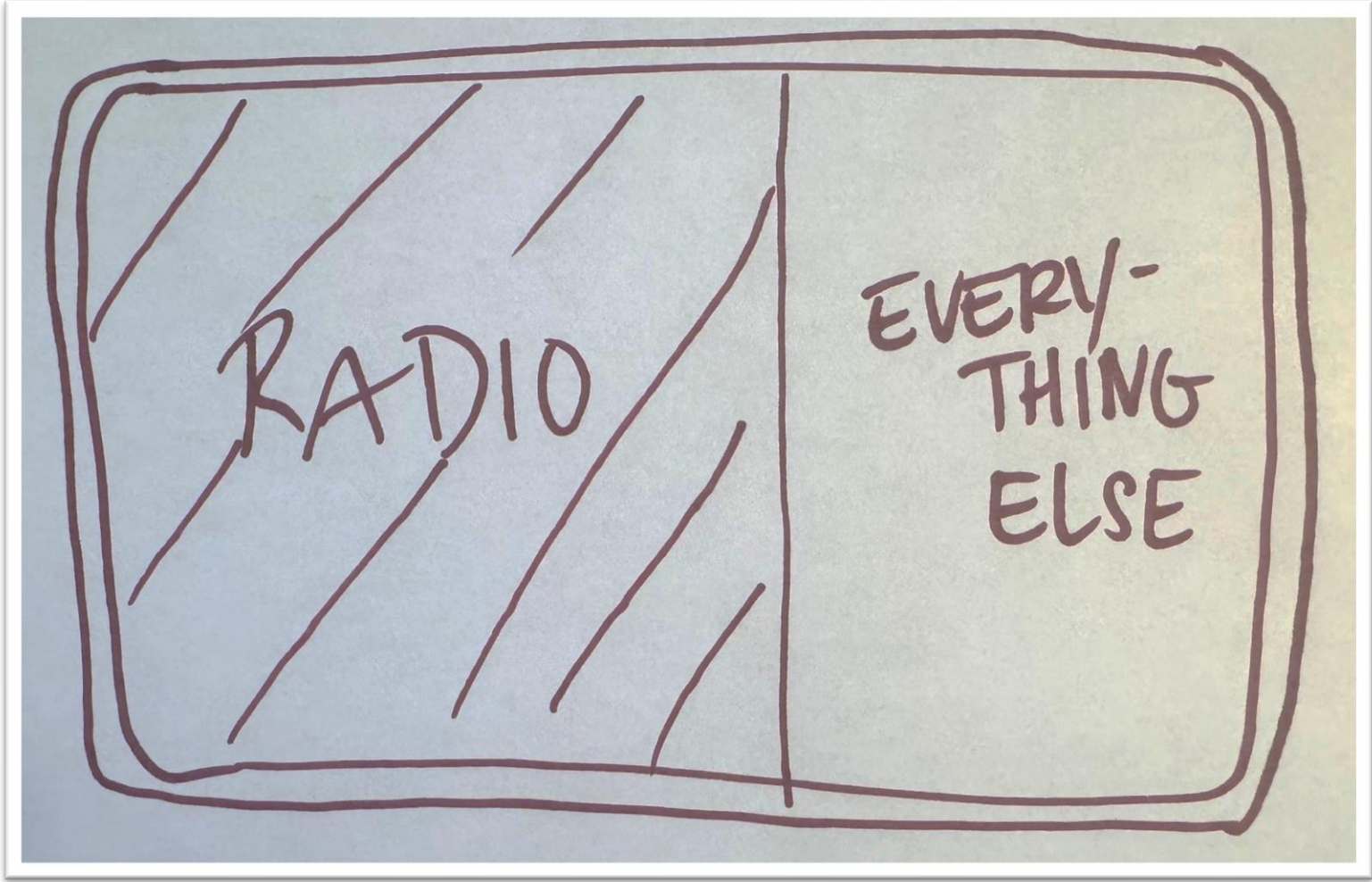
U.S. Population 13+

AM/FM Radio includes over the air and radio streams
 Streaming Music includes services such as Amazon Music, Apple Music, Pandora, Spotify, YouTube Music, and others
 YouTube for music and music videos only; does not include use of YouTube Music app



YouTube Podcasts Audiobooks

Research-backed* dashboard design:



*not really



KEY TAKEAWAY #2:

Radio is an essential part of
the in-car experience

Among recent/prospective car buyers in the UK, France, and Germany:

80% agree **“It is easier to listen to radio in the vehicle than other types of audio”**

Source: Dashboard Dialogue Study 2023: Online survey of recent/prospective car buyers in the UK, France and Germany

Those in the U.S. who have driven/ridden in car in last month and ever listen to “over-the-air” AM/FM radio in the car:

72% say a reason for listening to radio is **“it is easier to listen to radio in the vehicle than other types of audio”**

69% among those 13-34

Source: Edison Research Survey 2023; N=1,168 online interviews of persons age 13+

How much do you agree with the following statement...?

“Radio should be standard in every car”

% agreeing in...

Australia

90%

France

90%

Germany

91%

Italy

93%

UK

89%

U.S.

89%

Base: Current and prospective buyers who typically listen to radio in a car/vehicle

Source: 2021 Car Buyers Survey: Online survey of recent/prospective car buyers



Importance of FM or DAB/DAB+ radio in car/vehicle:

Among car buyers in the UK, France, and Germany:

91%

of recent and prospective car buyers said it was important that their recent/next vehicle has FM or DAB/DAB+ radio

82%

of prospective car buyers would be “much less” or “somewhat less” likely to purchase their next vehicle if it did not have a radio

43% saying “much less likely”

Source: Dashboard Dialogue Study 2023: Online survey of recent/prospective car buyers in the UK, France and Germany



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It's a love story, baby just say, "yes."

-Taylor Swift



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Megan Lazovick
mlazovick@edisonresearch.com