

EBU

OPERATING EUROVISION AND EURORADIO

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AUDIENCE TRENDS

RADIO 2023

PUBLIC VERSION

MEDIA INTELLIGENCE SERVICE

JULY 2023

ABOUT THIS REPORT

This report aims to provide an overview of the evolution of radio audience consumption between 2017 and 2022, based on official currency data from national Radio Audience Measurement (RAM) systems across the EBU Member countries.

In this report, radio audience trends are benchmarked across countries using common metrics of time spent, reach and market share.

The full radio market is presented using time spent listening and weekly reach data.

The performance of Public Service Media radio services is presented using weekly reach and daily market share data.

All data points are provided for all European Citizens (individuals) and European Youth, as younger audiences are an important but often difficult group for Public Service Media to reach. This report aims to show both the similarities and differences of youth media consumption behaviour from the overall population.

In addition, the profile of total Radio listeners and Public Service Media (PSM) Radio listeners has been included for the first time.

RELATED REPORTS

To provide a holistic picture of media consumption trends, alongside this Radio audience report the Media Intelligence Service also publishes:

AUDIENCE TRENDS: TELEVISION



This complementary report covers Television audience trends for the same period 2017-2022. Based on national Television Audience Measurement (TAM) currency data. Tracking viewing time and Television reach for the markets, and Reach of PSM Television services and their market share.

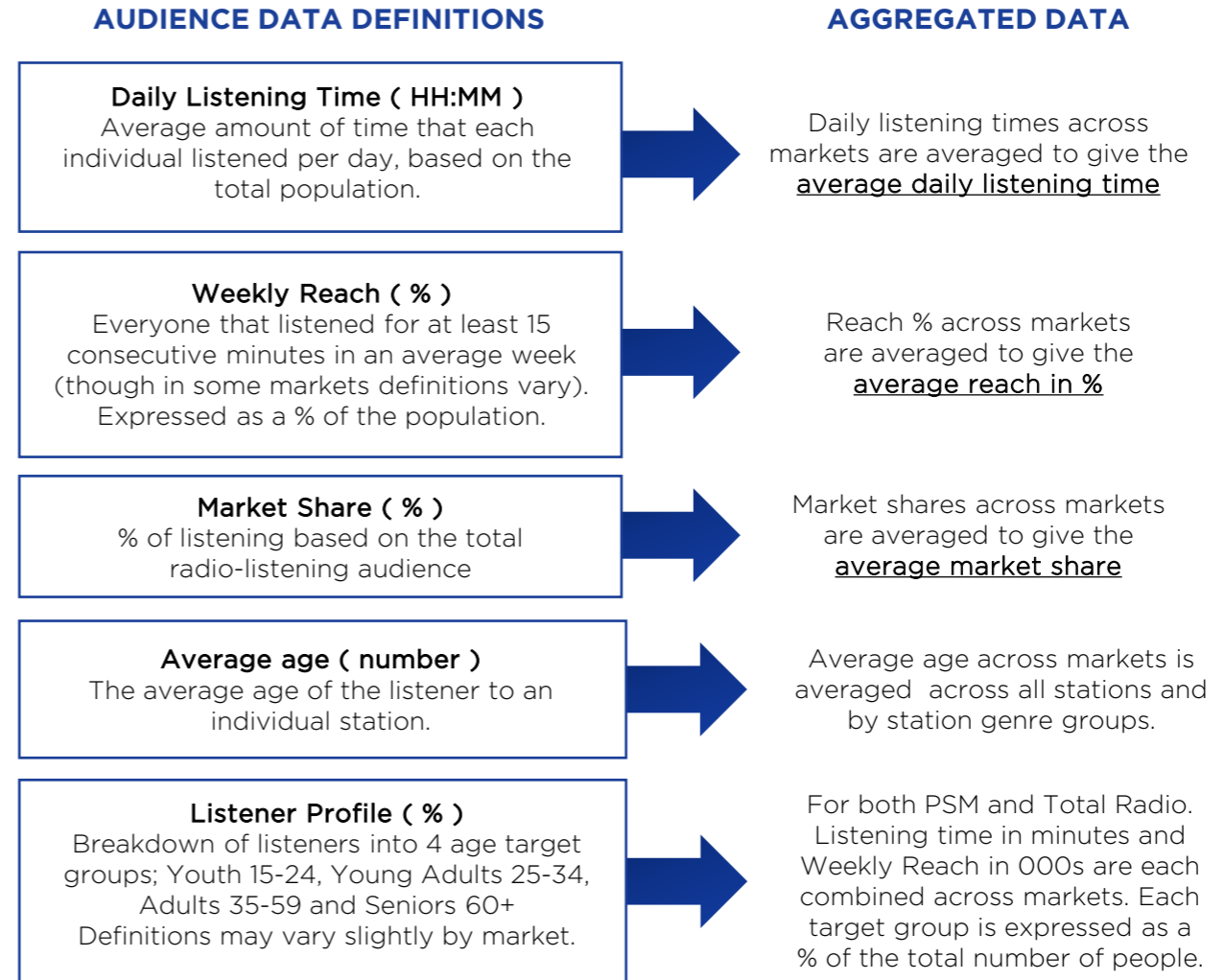
DIGITAL MEDIA CONSUMPTION TRENDS



This report explores media-related behaviour beyond traditional TV viewing and radio listening, providing a complete picture of changing and emerging media consumption behaviour.

METHODOLOGY

- This report is based on national Radio Audience Measurement (RAM) data, provided by EBU Members through the Media Intelligence Survey and the GEAR network.
- Year on year evolutions for each market are only reported for those with comparable figures. All those with methodological differences have been excluded.
- Aggregated evolutions are based on markets with complete historical series.
- Public Service Media (PSM) weekly reach and PSM market shares refer to EBU PSM organizations and when available non-EBU PSM.
- Youth age group refers to 15- to 24- year olds, though some market definitions vary slightly.



KEY FINDINGS - RADIO AUDIENCE TRENDS

EUROPEAN CITIZENS



EUROPEAN YOUTH



DAILY RADIO LISTENING TIME IN STEADY DECLINE

Listening time stood at 2h 13m in 2022, down 15 minutes on 5 years ago and 4 minutes on 2021. A decrease in listening time from last year was observed in 20 of the 27 studied markets.

Among youth, listening time stood at 1h 14m, down 22 minutes on 5 years ago and 3 minutes on previous year. In 2022, there were 12 markets with an average daily listening time of under one hour, 4 more markets than last year.

EUROPEAN CITIZENS



EUROPEAN YOUTH



WEEKLY RADIO REACH REMAINS MASSIVE BUT DECREASED AMONG YOUTH

The vast majority of people are still reached by radio every week. The weekly reach stood at 83.6% in 2022, down 2 percentage points on 5 years ago and 0.1 percentage points on 2021.

Among youth, the decline was stronger; weekly reach stood at 74.6% in 2022, down 6.3 percentage points on 5 years ago and 0.9 points on previous year. There were 18 markets in 2022 with an average weekly reach below 80%, compared to just 11 markets 5 years ago.

KEY FINDINGS – PSM RADIO AUDIENCE TRENDS

EUROPEAN CITIZENS



EUROPEAN YOUTH

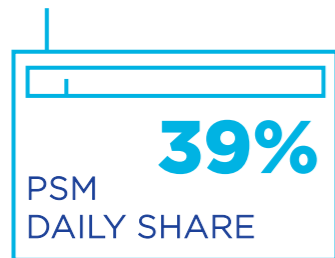


PSM WEEKLY RADIO REACH CONTINUES STEADY DECLINE

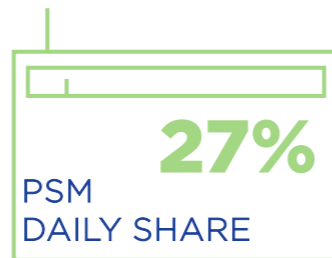
The decline of PSM weekly reach appears slightly more severe than the decline for all radio. PSM weekly reach stood at 43.4% in 2022, down 3 percentage points on 5 years ago and 0.5 percentage points on 2021. A decrease in PSM weekly radio reach from last year was observed in 22 of the 30 studied markets.

The decline was similar among youth. The PSM weekly reach stood at 29.5% in 2022, losing 4.1 percentage points on 5 years ago and 0.6 points on 2021.

EUROPEAN CITIZENS



EUROPEAN YOUTH



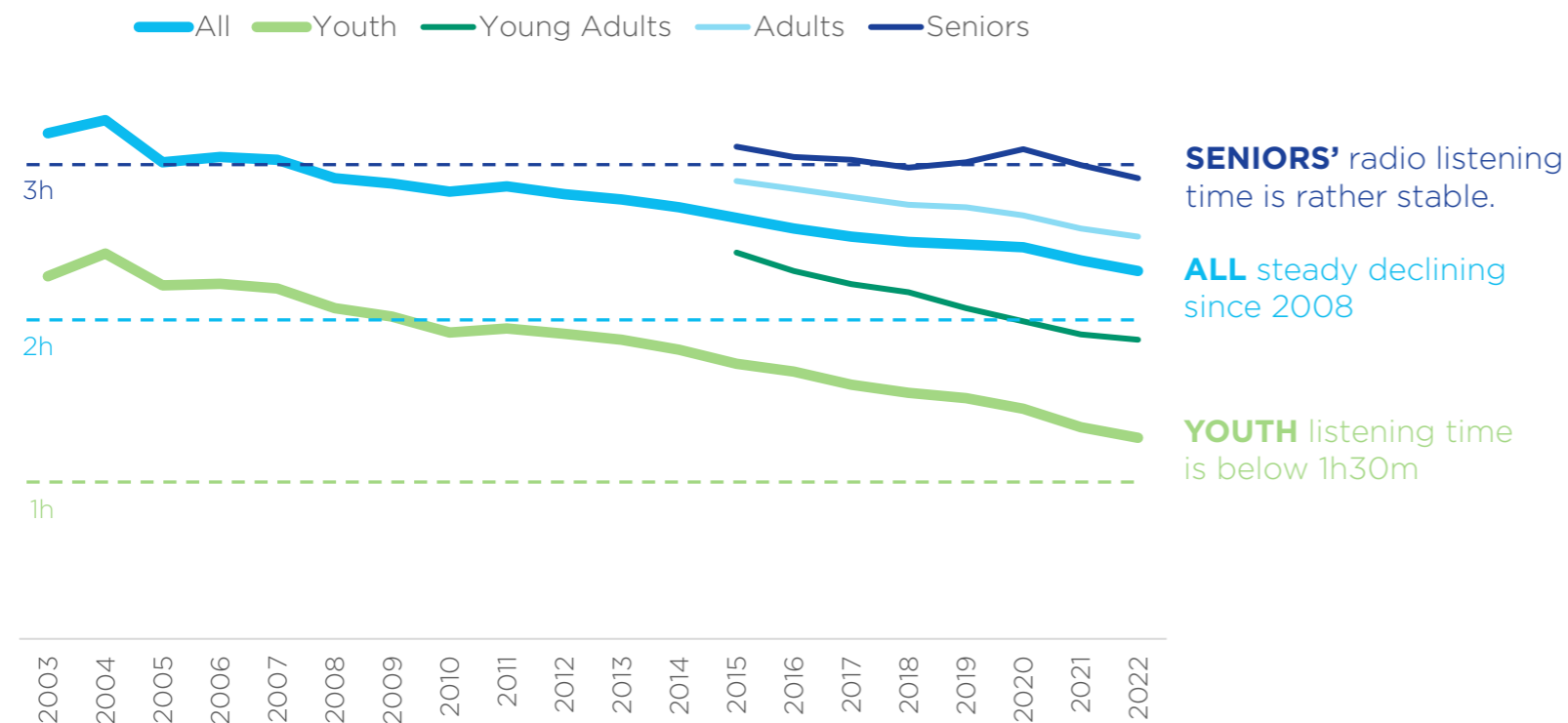
PSM DAILY MARKET SHARE REMAINS STRONG AND GAINS GROUND AMONG YOUTH

While the radio market in general is shrinking, the PSM market share remains stable over the long term for all citizens. PSM daily market share stood at 39.3% in 2022, down 0.9 percentage points on 5 years ago and 0.5 percentage points on 2021.

Amongst youth, PSM daily market share remained at its highest level on record in 2022 with 27%. It is up 1 percentage points on 5 years ago and 0.1 points on 2021. There were 9 markets in 2022 with an average daily market share over 40%.

OVERALL RADIO LISTENING TIME IS STEADILY DECLINING THE DECREASE IS SHARPER AMONG YOUNGER LISTENERS

EBU AREA DAILY AVERAGE RADIO LISTENING TIME EVOLUTION BY TARGET GROUP



European citizens lost close to 1 hour of radio listening since 2003. The decrease started in 2008, when the daily consumption was still around 3h. Since then, the curve follows a steady declining trend reaching its lowest point in 2022. More recent data, covering the years since 2015, allow us to compare the listening time across the different age groups.

In the past two years, seniors have seen their radio listening time decrease significantly. Between 2015 and 2020 decline in radio listening time was mainly observed among adults, young adults and youth, while seniors' consumption was rather stable. However, seniors' listening time has decreased in the past two years and reached its lowest level on record in 2022 with 2h 54m per day.

Radio consumption continues to fall among youth. Their daily listening time was almost halved since the early 2000s. Moreover, the recent figures show no sign of stabilization, as youth is the age group with the sharpest decrease in relative value since 2015: -27%.

Comparable radio listening time data for All individuals and youth available for 20 years, all target group data available since 2015. Age definitions: Youth 15-24, Young Adults 25-34, Adults 35-59, Seniors 60+. Definitions may vary slightly by country. Source: EBU based on Members' data. Note: trend based on 19 EBU Area markets.

RADIO LISTENING TIME IS IN STEADY DECLINE

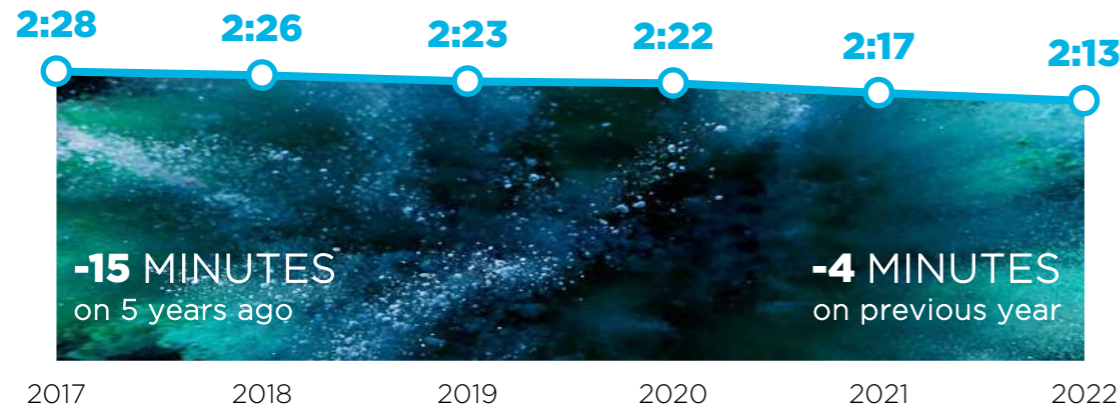
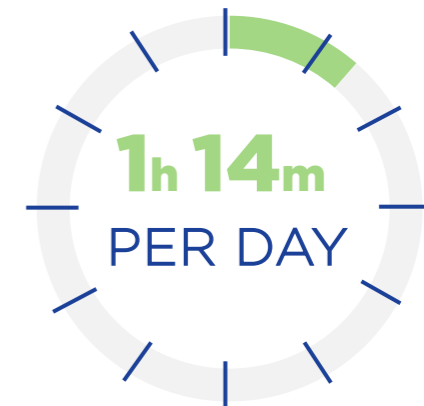
**IN 2022
EUROPEAN CITIZENS
LISTENED**

on average



**IN 2022
EUROPEAN YOUTH
LISTENED**

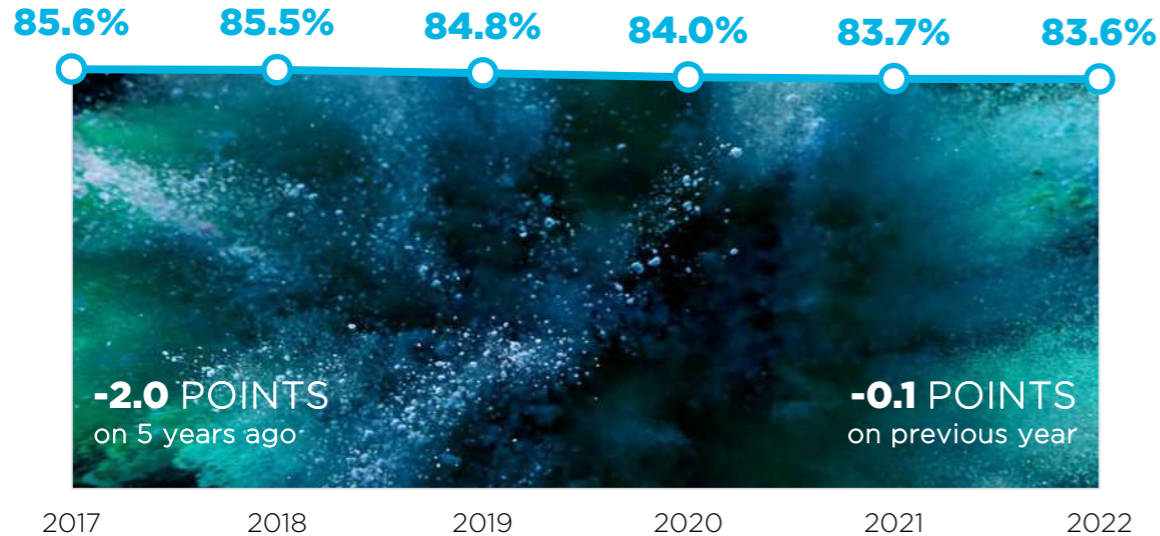
on average



RADIO WEEKLY REACH REMAINS MASSIVE BUT DECREASED AMONG YOUTH

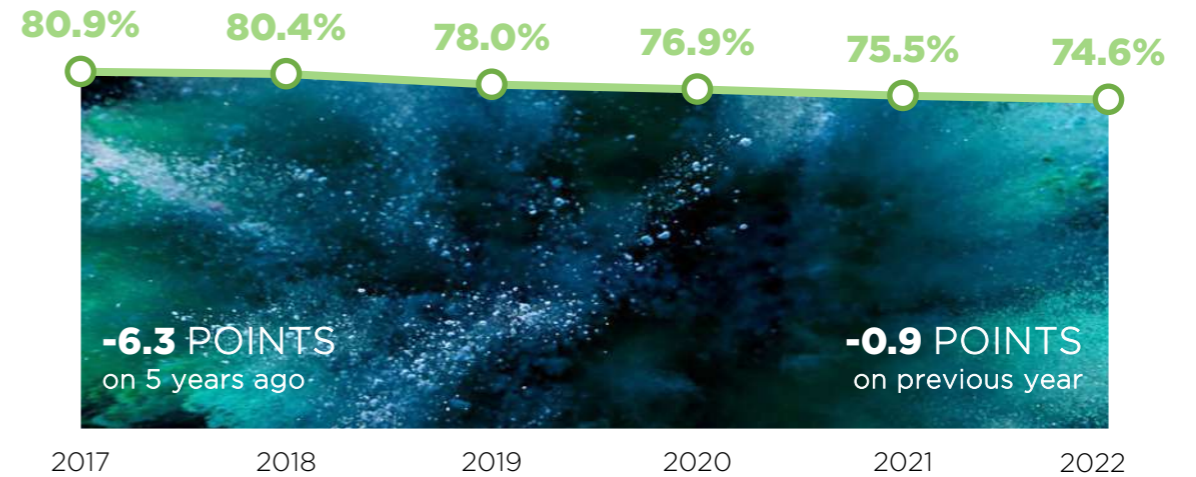
**IN 2022
EUROPEAN CITIZENS
REACHED**

by radio



**IN 2022
EUROPEAN YOUTH
REACHED**

by radio



PSM RADIO WEEKLY REACH CONTINUES STEADY DECLINE

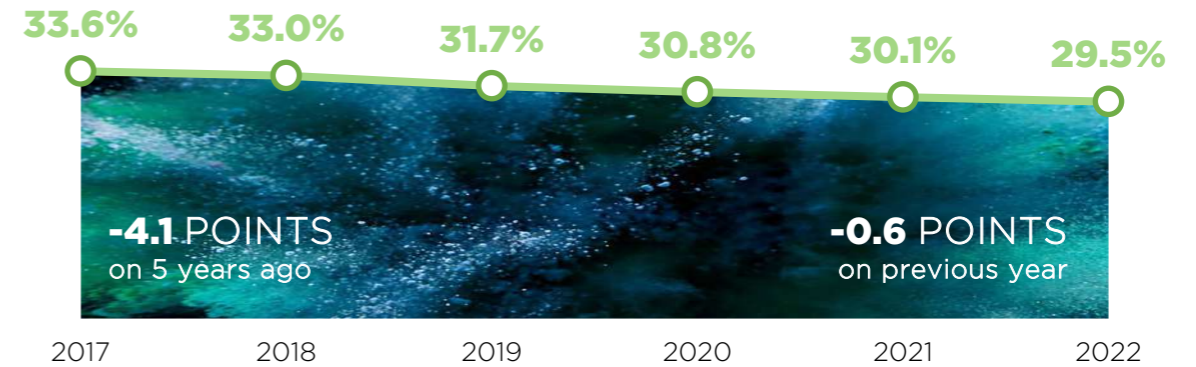
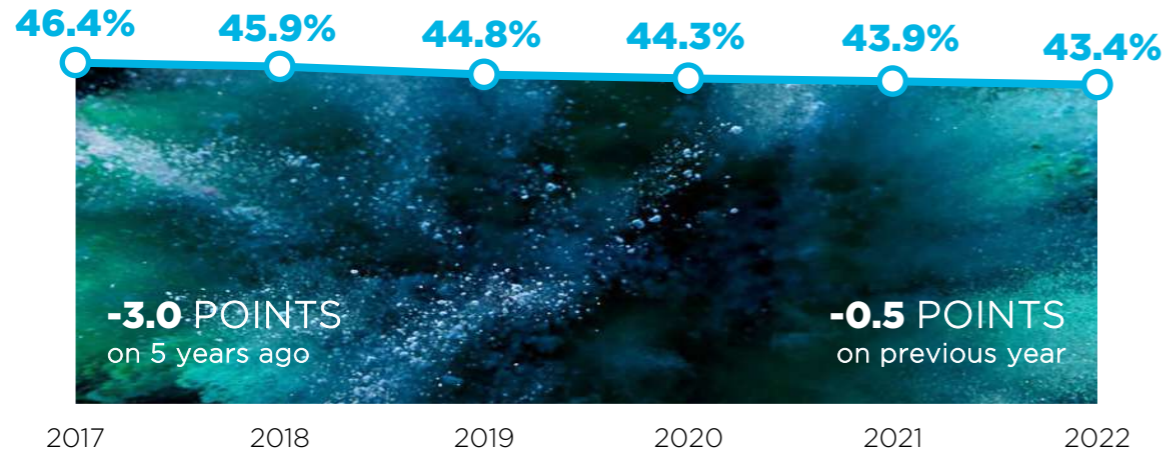
**IN 2022
EUROPEAN CITIZENS
REACHED**

by PSM radio



**IN 2022
EUROPEAN YOUTH
REACHED**

by PSM radio



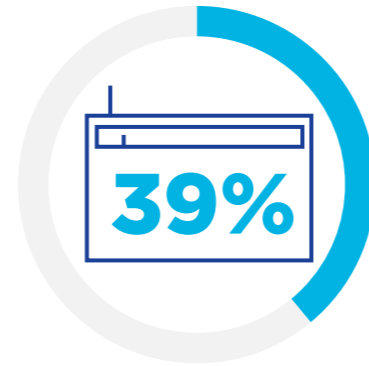
Weekly reach based on 15+ minutes consecutive listening (reach definitions can vary among countries).

Source: EBU based on Members' data. Youth 15- to 24- year olds. Note: average based on 28 EBU markets (27 EBU markets for youth)

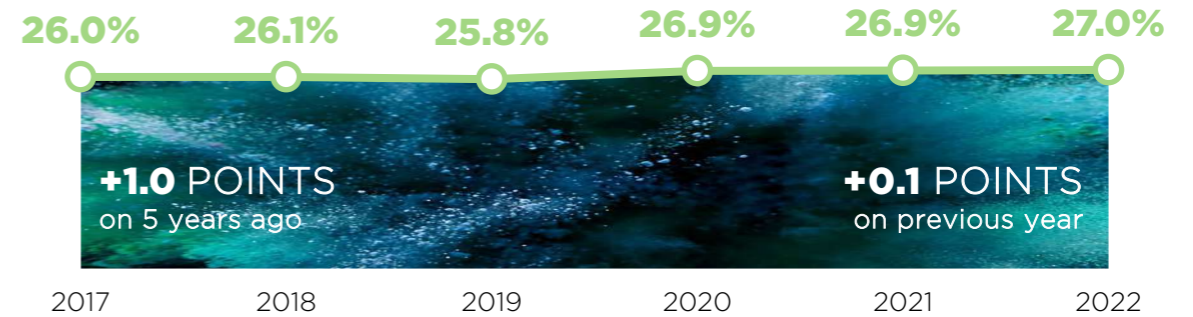
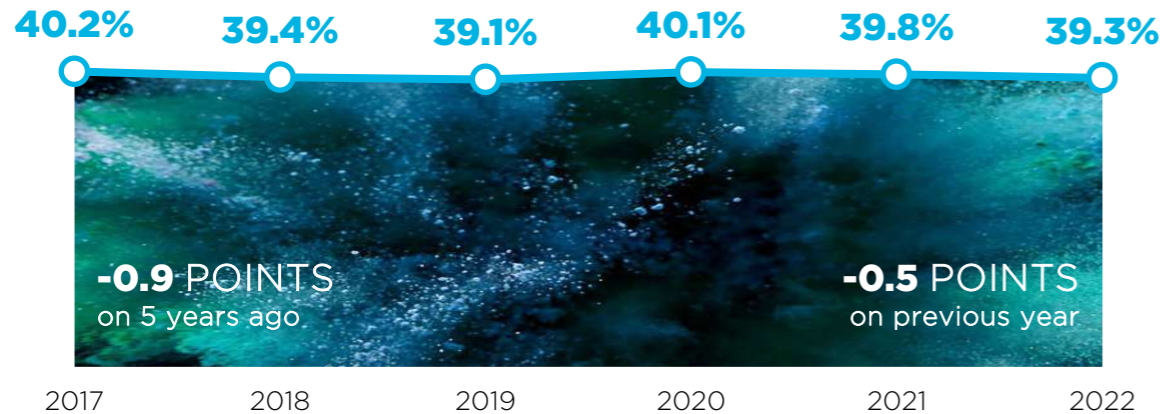
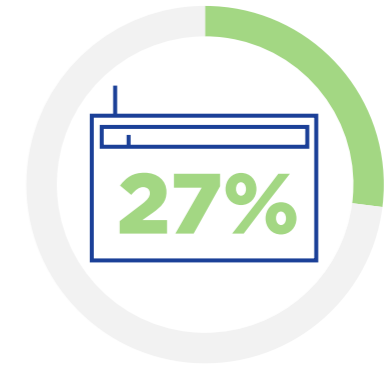
EBU Media Intelligence Service - Audience Trends: Radio 2023

PSM RADIO DAILY MARKET SHARE REMAINS STRONG AND GAINS GROUND AMONG YOUTH

Average PSM radio
MARKET SHARE
IN 2022
 among
EUROPEAN CITIZENS



Average PSM radio
MARKET SHARE
IN 2022
 among
EUROPEAN YOUTH



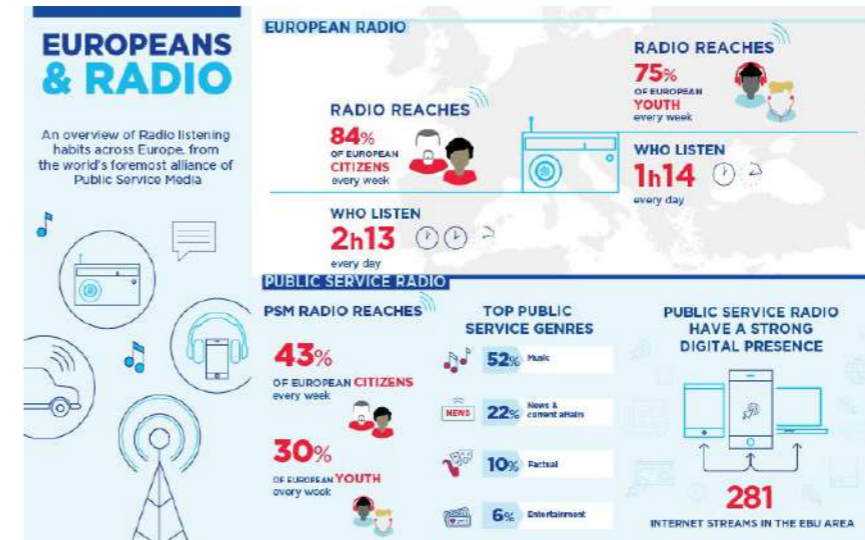
WHAT SHOULD I READ NEXT?



[AUDIENCE TRENDS: TELEVISION 2023](#)

If you liked this report why not take a look at the Audience Trends Television 2023 report. This report presents daily viewing time, weekly reach and PSM market share for all individuals and youth from 2022 and offers data over a 5-year range.

[Download full report here](#)



[EUROPEANS & RADIO INFOGRAPHIC](#)

This infographic is a collection of interesting key facts about Europeans & radio. Take a look.

[Download infographic here](#)

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MEDIA INTELLIGENCE SERVICE

This report is published by the European Broadcasting Union's Media Intelligence Service (MIS).

MIS provides Member broadcasting organizations with the latest market data, research and analysis needed to plan their future strategies and stay ahead of the game.

Our experts cover a broad range of topics, including TV and radio trends, new media developments, market structure and concentration, funding and public policy issues.

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