

## OFCOM

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SURVEY NAME: OFCOM AUDIO SURVEY 2024

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METHODOLOGY: ONLINE & CATI OMNIBUS

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SURVEY LENGTH: 22 QUESTIONS/ 44 UNITS (WITHOUT CODING)

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SAMPLE N= 2,000 UK 16+ SAMPLE, BOOST IN NI & WALES TO 150

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CATI SAMPLE: N=1000 UK

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We are conducting research on behalf of the UK's communications regulator Ofcom, who are looking to understand use of and attitudes towards different types of radio and audio services.

### **Section 1 – Audio platforms/radio sources**

2 UNITS ONLINE

**ASK ALL (ONLINE & CATI)**

**Q1. How often, if at all, do you listen to any of the following?**

#### **GRID ROWS – RANDOMISE ORDER**

- a) A radio station that plays music (e.g. BBC Radio 2, Heart, Classic FM) *(LOCK WITH CODE B)*
- b) A radio station that is mainly speech-based (e.g. BBC Radio 4, LBC, talkSPORT)
- c) Your personal music you have stored on a digital device (e.g. on a smartphone, mp3 player)
- d) An online music service (e.g. Spotify, Amazon Music)
- e) Your personal music collection on CD, vinyl record or cassette tapes
- f) A podcast
- g) An audiobook (digital/online and physical)
- h) TV music video channels for background listening (e.g. 4Music/That's 60s) *(LOCK WITH CODE I)*
- i) Music video websites or apps for background listening (e.g. YouTube)
- j) Social audio services (e.g. Clubhouse)
- k) Other type of audio content (e.g. Time to Walk by Apple Fitness+, guided audio meditation) *(CODE TO APPEAR LAST)*

#### **GRID COLUMNS – SINGLE CODE**

- 1. Several times a day
- 2. About once a day
- 3. Several times a week
- 4. About once a week
- 5. Several times a month
- 6. About once a month
- 7. Less often
- 8. Never

3 UNITS

**ASK ALL CODES 1-6 CHOSEN AT Q1 (AT LEAST MONTHLY)**

**Q1a. And why do you say you listen to the following?**

## GRID ROWS – ALL AUDIO CONTENT CODED 1-6 AT Q1

## GRID COLUMNS – MULTI CODE – RANDOMISE ORDER

1. For background listening
2. For company
3. To relax
4. To pass the time
5. For practical advice
6. To discover new music
7. For entertainment
8. Habit
9. To give me something to talk about
10. To learn something new
11. To make me feel better
12. To catch-up on news
13. Someone else chooses
14. Other reason

1 UNIT

**ASK ALL [BACK FILTER ANYONE WHO LISTS A RADIO STATION HERE BUT DID NOT CODE 'A RADIO STATION' IN Q1]**

**Q2. Which, if any, of these radio stations have you listened to in the last 7 days?**

## MULTICODE

1. BBC Radio 1
2. BBC Radio 2
3. BBC Radio 3
4. BBC Radio 4
5. BBC Radio 5 live
6. BBC 6 Music
7. BBC Asian Network
8. BBC Radio 1Xtra
9. BBC Radio 4 Extra
10. BBC Radio 5 live sports extra
11. BBC World Service
12. BBC radio for your nation / region (e.g. BBC Radio Scotland, BBC Radio Newcastle)
13. talkRADIO
14. talkSPORT/talkSPORT 2
15. Classic FM
16. Any Absolute Radio station
17. Any Capital radio station
18. Any Heart radio station
19. Any Smooth Radio station
20. Any Kiss radio station
21. Any Magic radio station
22. Any Hits radio station
23. Any Greatest Hits radio station
24. Virgin Radio
25. Any LBC radio station
26. Any other commercial radio station
27. Other (please specify)
28. Have not listened to the radio in last 7 days

## Section 2 – Devices used for radio

3 UNITS

### ASK ALL RADIO LISTENERS IN Q2

**Q3. In which of the following ways do you tend to listen to the radio?**

### GRID ROWS [SHOW STATIONS LISTENED TO IN Q2]

### GRID COLUMNS [MULTICODE]

- A. FM/AM radio in the house/office
- B. FM/AM radio in the car/van/lorry
- C. DAB digital radio in the house
- D. DAB digital radio in the car/van/lorry
- E. TV set via a channel
- F. TV set via an app
- G. Smart speaker (e.g. Google home hub, Amazon Alexa)
- H. Internet radio set (radio set that connects to your home Wi-Fi) LOCKED WITH G
- I. Website or app using a smartphone, tablet or laptop/computer
- J. Apps built into a car's 'infotainment system' using the car's own internet access (not by connecting via a mobile phone)
- K. Other (please specify)

1 UNT

### ASK ALL DAB LISTENERS (CODES C AND/OR D IN Q3)

**Q3A. Is the DAB digital radio you listen to at home and/or in your car DAB+ enabled?**

*DAB+ is a newer form of DAB radio. DAB+ radio sets are able to receive more radio stations than DAB radio sets – up to 60 additional stations depending on where you live.*

### SINGLE CODE

- 1. Yes
- 2. No
- 3. Don't know

1 UNIT

### ASK ALL EXCEPT SMART SPEAKER RADIO USERS (G IN Q3)

**Q5. Do you personally use a smart speaker?**

- 1. Yes
- 2. No

1 UNIT

### ASK ALL SMART SPEAKER RADIO USERS (G IN Q3)

**Q4. Have you ever asked your smart speaker to play a particular radio station or radio programme, but it has then started playing a different radio station or something you weren't expecting?**

- 1. Yes
- 2. No
- 3. Don't know

1 UNIT

**ASK ALL USING SMART SPEAKER (G IN Q3 OR YES IN Q5)**

**Q6. If you have ever asked your smart speaker to give a news update, how aware are you of the news source (e.g. BBC, The Times, Sky News)?**

1. Always aware
2. Sometimes aware
3. Never aware
4. I have never used my smart speaker for news
5. Don't know

1 UNIT

**ASK ALL USING SMART SPEAKER (G IN Q3 OR YES IN Q5) EXCEPT THOSE WHO DO NOT USE IT FOR NEWS (CODE 4) IN Q6**

**Q7. Have you/ has someone in your household changed the default settings in your smart speaker to select a preferred provider for your news updates?**

1. **Yes**, I/we have changed the default settings in my smart speaker
2. **No**, I/we have not changed the default settings but I was aware I could do that
3. **No**, I/we have not changed the default settings, I was not aware I could do that
4. Don't know

1 UNIT

**ASK ALL USING SMART SPEAKER (G IN Q3 OR YES IN Q5)**

**Q8. Have you/ has someone in your household changed the default settings in your smart speaker to select a preferred provider for your music?**

1. **Yes**, I/we have changed the default settings in my smart speaker
2. **No**, I/we have not changed the default settings but I was aware I could do that
3. **No**, I/we have not changed the default settings, I was not aware I could do that
4. **No**, I/we do not use a smart speaker for music
5. Don't know

**Section 3 – Audio services used**

**For all those responding codes 1-6 (at least monthly) at Q1 (all except E personal music collection)**

1 UNIT

**ASK ALL ANSWERING Q1 A OR B AND Q3 F-J (ONLINE RADIO LISTENERS) DO NOT ROTATE**

**9a. Thinking specifically about listening to radio, which of these ways do you listen (using websites or apps):**

1. BBC Sounds
2. Apple Music
3. Globalplayer
4. Website or app for Heart, Capital, Classic FM, Smooth, LBC, Radio X radio stations
5. Rayo / Planetradio.co.uk (for radio stations including Magic, Kiss, Greatest Hits, Hits, Absolute, Scala, Planet Rock)
6. Specific apps for Magic, Kiss, Greatest Hits, Hits, Absolute, Scala, Planet Rock
7. Other non-BBC radio website or app (e.g. talkSPORT, Virgin, Times Radio, local commercial radio, community radio)
8. YouTube
9. Spotify Premium (paid for, with no ads)
10. Spotify Premium (on a free trial, with no ads)

11. Spotify (free service, includes advertising)
12. Amazon Music Free (ad-supported, no subscription needed)
13. Amazon Music Prime
14. Amazon Music Unlimited
15. Radioplayer
16. TuneIn (free service with advertising)
17. TuneIn (paid for version)
18. Deezer
19. Other (please specify)
20. Don't know

## 2 UNITS

### ASK ALL THOSE ANSWERING Q9A

**Q9b. And how often do you use these for listening to radio?**

### [SHOW CODES SELECTED AT Q9A ONLY AND PIPE THROUGH OTHER CODE]

1. BBC Sounds
2. Apple Music
3. Globalplayer
4. Website or app for Heart, Capital, Classic FM, Smooth, LBC, Radio X radio stations
5. Rayo / Planetradio.co.uk (for radio stations including Magic, Kiss, Greatest Hits, Hits, Absolute, Scala, Planet Rock)
6. Specific apps for Magic, Kiss, Greatest Hits, Hits, Absolute, Scala, Planet Rock
7. Other non-BBC radio website or app (e.g. talkSPORT, Virgin, Times Radio, local commercial radio, community radio)
8. YouTube
9. Spotify Premium (paid for, with no ads)
10. Spotify Premium (on a free trial, with no ads)
11. Spotify (free service, includes advertising)
12. Amazon Music Free (ad-supported, no subscription needed)
13. Amazon Music Prime
14. Amazon Music Unlimited
15. Radioplayer
16. TuneIn (free service with advertising)
17. TuneIn (paid for version)
18. Deezer
19. Other (please specify)

### GRID COLUMNS – SINGLE CODE

- A. Several times a day
- B. About once a day
- C. Several times a week
- D. About once a week
- E. Several times a month
- F. About once a month
- G. Less often

## 1 UNIT

### ASK ALL ANSWERING Q1 D. DO NOT ROTATE

**Q9c. Thinking specifically about listening to online music (not including radio), which of these ways do you listen (using websites or apps):**

1. BBC Sounds
2. Apple Music

3. Globalplayer
4. Rayo / planetradio.co.uk
5. YouTube Premium / YouTube Music (subscription service)
6. YouTube / YouTube Music (free service)
7. Spotify Premium (paid for, with no ads)
8. Spotify Premium (on a free trial, with no ads)
9. Spotify (free service, includes advertising)
10. Amazon Music Free (ad-supported, no subscription needed)
11. Amazon Music Prime
12. Amazon Music Unlimited
13. Radioplayer
14. TuneIn (free service with advertising)
15. TuneIn (paid for version)
16. SoundCloud
17. Deezer
18. Tidal
19. Other (please specify)

## 2 UNIT

### ASK ALL THOSE ANSWERING Q9C

**Q9d. And how often do you use each of these platforms to listen to online music?**

**[SHOW CODES SELECTED AT Q9C ONLY AND PIPE THROUGH OTHER CODE]**

1. BBC Sounds
2. Apple Music
3. Globalplayer
4. Rayo / planetradio.co.uk
5. YouTube Premium / YouTube Music (subscription service)
6. YouTube / YouTube Music (free service)
7. Spotify Premium (paid for, with no ads)
8. Spotify Premium (on a free trial, with no ads)
9. Spotify (free service, includes advertising)
10. Amazon Music Free (ad-supported, no subscription needed)
11. Amazon Music Prime
12. Amazon Music Unlimited
13. Radioplayer
14. TuneIn (free service with advertising)
15. TuneIn (paid for version)
16. SoundCloud
17. Deezer
18. Tidal
19. Other (please specify)

### GRID COLUMNS – SINGLE CODE

- A. Several times a day
- B. About once a day
- C. Several times a week
- D. About once a week
- E. Several times a month
- F. About once a month
- G. Less often

## 1 UNIT

**ASK ALL ANSWERING Q1 F. DO NOT ROTATE**

**9e. Thinking specifically about listening to podcasts, which of these ways do you listen (using websites or apps):**

1. BBC Sounds
2. Apple podcasts / iTunes
3. Globalplayer
4. Rayo / planetradio.co.uk
5. Other non-BBC **radio** website or app
6. YouTube Premium / YouTube Music (subscription service)
7. YouTube / YouTube Music (free service)
8. Google podcasts
9. Spotify Premium (paid for, with no ads)
10. Spotify Premium (on a free trial, with no ads)
11. Spotify (free service, includes advertising)
12. Amazon Music Free (ad-supported, no subscription needed)
13. Amazon Music Prime
14. Amazon Music Unlimited
15. Audible
16. Radioplayer
17. TuneIn (free service with advertising)
18. TuneIn (paid for version)
19. SoundCloud
20. Deezer
21. Tidal
22. Pocket Casts
23. BeyondPod
24. DoggCatcher
25. Stitcher
26. Podcast Addict
27. Overcast
28. Castbox
29. Podbean
30. Player FM
31. Newspaper or magazine site/app (e.g. The Guardian, The Times, The Spectator)
32. Website or app of the podcast itself (please specify) e.g. serialpodcast.org, thisamericanlife.org, woodenovercoats.com
33. Other (please specify)

## 2 UNITS

**ASK ALL THOSE ANSWERING Q9E**

**Q9F. And how often would you say you use each of these platforms to listen to podcasts?**

**[SHOW CODES SELECTED AT Q9E ONLY AND PIPE THROUGH OTHER CODE]**

1. BBC Sounds
2. Apple podcasts / iTunes
3. Globalplayer
4. Rayo / planetradio.co.ukOther non-BBC radio website or app
5. YouTube Premium / YouTube Music (subscription service)
6. YouTube / YouTube Music (free service)
7. Google podcasts
8. Spotify Premium (paid for, with no ads)
9. Spotify Premium (on a free trial, with no ads)
10. Spotify (free service, includes advertising)
11. Amazon Music Free (ad-supported, no subscription needed)

12. Amazon Music Prime
13. Amazon Music Unlimited
14. Audible
15. Radioplayer
16. TuneIn (free service with advertising)
17. TuneIn (paid for version)
18. SoundCloud
19. Deezer
20. Tidal
21. Pocket Casts
22. BeyondPod
23. DoggCatcher
24. Stitcher
25. Podcast Addict
26. Overcast
27. Castbox
28. Podbean
29. Player FM
30. Newspaper or magazine site/app (e.g. The Guardian, The Times, The Spectator)
31. Website or app of the podcast itself (please specify) e.g. serialpodcast.org, thisamericanlife.org, woodenovercoats.com
32. Other (please specify)

## GRID COLUMNS – SINGLE CODE

- A. Several times a day
- B. About once a day
- C. Several times a week
- D. About once a week
- E. Several times a month
- F. About once a month
- G. Less often

## 1 UNIT

### ASK ALL ANSWERING Q1 G

9g. Thinking specifically about listening to audiobooks, which of these ways do you listen:

1. BBC Sounds
2. Apple Books
3. Audible
4. Libby
5. YouTube
6. Google Play Books
7. Kobo
8. Nook
9. Librivox
10. Audiobooks.com
11. Scribd
12. Spotify Premium (paid for, with no ads)
13. Spotify Premium (on a free trial, with no ads)
14. Spotify (free service, includes advertising)
15. Amazon Kindle
16. Audio book on CD / cassette / vinyl
17. Other (please specify)

## 2 UNITS

## ASK ALL THOSE ANSWERING Q9G

**Q9h. And how often do you use each of these platforms when listening to audiobooks?**

**[SHOW CODES SELECTED AT Q9G ONLY AND PIPE THROUGH OTHER CODE]**

1. BBC Sounds (website or app)
2. Apple Books
3. Audible
4. Libby
5. YouTube
6. Google Play Books
7. Kobo
8. Nook
9. Librivox
10. Audiobooks.com
11. Scribd
12. Spotify Premium (paid for, with no ads)
13. Spotify Premium (on a free trial, with no ads)
14. Spotify (free service, includes advertising)
15. Amazon Kindle
16. Audio book on CD / cassette / vinyl
17. Other (please specify)

## GRID COLUMNS – SINGLE CODE

- A. Several times a day
- B. About once a day
- C. Several times a week
- D. About once a week
- E. Several times a month
- F. About once a month
- G. Less often

1 UNIT

## ASK ALL ANSWERING Q1 I

**9i. Thinking specifically about using music video websites or apps for background listening (e.g.**

**YouTube) which of these ways do you listen:**

1. Apple Music
2. BBC Sounds on YouTube
3. YouTube Premium / YouTube Music (subscription service) (not including BBC Sounds on YouTube)
4. YouTube / YouTube Music (free service) (not including BBC Sounds on YouTube)
5. Amazon Music Unlimited
6. Amazon Music Prime
7. Amazon Music Free (ad-supported, no subscription needed)
8. SoundCloud
9. Deezer
10. Tidal
11. Other (please specify)

1 UNIT

## ASK ALL THOSE ANSWERING Q9I

**Q9j. And how often would you say you use each of these?**

**[SHOW CODES SELECTED AT Q9I ONLY AND PIPE THROUGH OTHER CODE]**

1. Apple Music
2. BBC Sounds on YouTube
3. YouTube Premium / YouTube Music (subscription service) (not including BBC Sounds on YouTube)

4. YouTube / YouTube Music (free service) (not including BBC Sounds on YouTube)
5. Amazon Music Unlimited
6. Amazon Music Prime
7. Amazon Music Free (ad-supported, no subscription needed)
8. SoundCloud
9. Deezer
10. Tidal
11. Other (please specify)

### GRID COLUMNS – SINGLE CODE

- A. Several times a day
- B. About once a day
- C. Several times a week
- D. About once a week
- E. Several times a month
- F. About once a month
- G. Less often

1 UNIT

### ASK ALL USING A SERVICE IN Q9 A-J

**Q10. And how long have you been using [SERVICE]?**

**SHOW ALL SERVICES USED, MAXIMUM OF 5, RANDOMLY SELECTED, DO NOT ASK ABOUT BBC SOUNDS**

### SINGLE CODE

1. Less than a month
2. 1-6 months
3. 6 months – 1 year
4. Over a year
5. Can't remember

### Section 4 – BBC Sounds

1 UNIT

### ASK ALL WHO DO NOT SELECT BBC SOUNDS IN Q9

**Q11. You said you haven't used BBC Sounds, have you ever heard of it before today?**

### SINGLE CODE

1. Yes
2. No
3. Don't know/not sure

1 UNIT

### ASK ALL AWARE OF BBC SOUNDS BUT DON'T USE IT IN Q11

**Q12. Which of these best describes why you don't listen to BBC Sounds?**

### MULTICODE – RANDOMISE ORDER

1. I don't think it is a service that is relevant to me/has something for me
2. I don't listen to BBC radio
3. I am not interested in the content
4. I already use/prefer other online audio streaming services
5. I access BBC audio content on other services (e.g. Spotify)
6. I access BBC audio content in other ways (e.g. a radio set)
7. I don't want to have to sign in

8. I don't know what it offers
9. It is difficult to use
10. Other (please specify)

1 UNIT

**ASK ALL USING BBC SOUNDS IN Q9**

**Q13. And how long have you been using BBC Sounds?**

**SINGLE CODE**

1. Less than a month
2. 1-6 months
3. 6 months – 1 year
4. Over a year
5. Can't remember

1 UNIT

**ASK ALL USING BBC SOUNDS IN Q9. ASK AS GRID QUESTION**

**Q14. As a result of using BBC Sounds, would you say you are listening to more, less or about the same amount of each of the following types of BBC audio than before you started using BBC Sounds?**

**ROWS**

- A. Live radio
- B. Catch-up radio
- C. Podcasts
- D. Online music playlists/mixes
- E. Audiobooks

**COLUMNS**

1. I am listening to more
2. I am listening to less
3. I am listening about the same
4. Don't know

1 UNIT

**ASK ALL USING BBC SOUNDS IN Q9**

**Q15. Has your use of other audio services that provide different types of audio changed since you started using BBC Sounds or has it stayed the same?**

**GRID ROWS**

1. Online radio (not on BBC Sounds)
2. Catch-up radio programmes (not on BBC Sounds)
3. Podcasts (not on BBC Sounds)
4. Music mixes/playlists (not on BBC Sounds)
5. Audiobooks (not on BBC Sounds)

**COLUMN**

- A. I use other audio services providing this type of content more
- B. I use other audio services providing this type of content less
- C. I use other audio services providing this type of content about the same
- D. Don't know

## Section 5 – Importance and rating of services

### 2 UNITS

#### ASK ALL

**Q17. Thinking about the services which offer different types of online audio (e.g. radio, music, podcasts etc), how important, if at all, are the following?**

#### GRID ROWS – RANDOMISE ORDER

1. Range of content
2. Being able to access different types of audio (radio, music playlists and podcasts) in one place
3. Content from a range of different providers
4. Ease of use
5. Ease of navigation
6. Exclusive content only available through that platform
7. Personalisation options – it gets to know my tastes
8. Cost of the service
9. The service being free from adverts
10. The ethics and morals of the service provider
11. Ability to share playlists
12. My friends/family use the same service
13. I can interact with friends/family on the service
14. Ability to use the service easily on a range of devices
15. Ability to use parental controls

#### GRID COLUMNS – SINGLE CODE

- A. Very important
- B. Quite important
- C. Neither important nor unimportant
- D. Quite unimportant
- E. Not important at all

### 2 UNITS

**ASK ALL SELECTING SERVICE IN Q9. ASK FOR UP TO 5 TYPES. IF SELECTED MORE THAN 5, PRIORITISE BBC SOUNDS. PIPE THROUGH PLATFORMS SELECTED FROM Q9 (ONLINE AUDIO)**

**Q18. You said you use [SERVICE]. How good or bad, are they on each of the following?**

#### GRID ROWS – RANDOMISE ORDER

1. Range of content
2. Being able to access different types of audio (radio, music playlists and podcasts) in one place
3. Content from a range of different providers
4. Ease of use
5. Ease of navigation
6. Exclusive content only available through that platform
7. Personalisation options – it gets to know my tastes
8. Cost of the service
9. Amount of adverts
10. Ethics/morals
11. Ability to share playlists
12. Interaction with friends/family
13. Ability to use the service easily on a range of devices
14. Discoverability of new music

#### GRID COLUMNS – SINGLE CODE

- A. Very good
- B. Quite good
- C. Neither good nor poor
- D. Quite poor
- E. Very poor

## 2 UNITS

**ASK ALL SELECTING SERVICE IN Q9. ASK FOR UP TO 5 TYPES. IF SELECTED MORE THAN 5, PRIORITISE BBC SOUNDS. PIPE THROUGH PLATFORMS SELECTED FROM Q2 (RADIO) AND Q9 (ONLINE AUDIO)**

**Q19. On a scale of 1 to 10, where 1 means extremely dissatisfied and 10 means extremely satisfied, overall, how satisfied or dissatisfied are you with your experience of using these audio services?**

## Section 6 – How people decide what to listen to

1 UNIT /(3 UNITS IF CODING NEEDED)

**ASK ALL LISTENING TO RADIO AND EITHER ONLINE MUSIC STREAMING OR PODCASTS  
OPEN-ENDED**

**Q20. When you choose to listen to radio, what is the main reason you decide to listen to this and not online music streaming/podcasts?**

1 UNIT /(3 UNITS IF CODING NEEDED)

**ASK ALL LISTENING TO RADIO AND ONLINE MUSIC STREAMING  
OPEN-ENDED**

**Q21. When you choose to listen to online music streaming, what is the main reason you decide to listen to this and not radio?**

1 UNIT /(3 UNITS IF CODING NEEDED)

**ASK ALL LISTENING TO RADIO AND PODCASTS  
OPEN-ENDED**

**Q22. When you choose to listen to podcasts, what is the main reason you decide to listen to this and not radio?**