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# Study: In-Car Audio Choices Vary Considerably Among Individual Auto Brands.

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Do Chevy drivers have different audio preferences than the owners of German luxury vehicles do? A new analysis of Edison Research Share Of Ear data, which breaks out in-vehicle audio listening by individual auto brands, offers some answers.

Cutting right to the chase, AM/FM radio by far leads in share of all audio listening among the major auto brands. But the numbers vary from one car brand to another.

Combining both ad-supported and ad-free listening in the car, AM/FM radio's Share Of Ear is highest in Chevrolet (67%) and Honda (65%). It is lowest in BMW (41%) and Audi (41%). In between are Toyota (61%), Ford and Subaru (58% each), Nissan and Kia (55% each), Jeep (53%), and Hyundai (54%).

In the car: AM/FM radio leads share of all audio listening among major auto parent companies						
In the car (primary car driven) share of all (ad-supported and ad-free) audio time spent						
	Parent companies					
	General Motors	Honda Motor Co.	Hyundai Motor Group	Stellantis	Toyota Motor Industries	Mercedes-Benz Group
AM/FM radio	66%	65%	59%	53%	60%	61%
Ad-free SiriusXM	11%	11%	14%	16%	8%	17%
Owned music	5%	6%	2%	8%	5%	6%
Podcasts	5%	5%	3%	5%	4%	1%
Music videos on YouTube	4%	1%	2%	3%	6%	3%
Ad-supported SiriusXM	3%	2%	3%	4%	2%	4%
Ad-free Spotify	2%	5%	5%	2%	2%	4%
Ad-supported Pandora	2%	1%	3%	2%	1%	4%
Apple music	1%	1%	3%	3%	2%	0%
Amazon music	1%	1%	0.3%	0.4%	1%	0%
Audiobooks	1%	2%	2%	0.4%	2%	0%
Ad-supported Spotify	0.4%	0.3%	1%	1%	1%	0%
Other streaming audio	0.2%	1%	1%	1%	6%	1%
Ad-free Pandora	0.1%	0%	2%	2%	0.2%	0%
Other	0%	0.1%	0%	0%	0%	0%

Source: Edison Research, "Share of Ear," Q2 2022-Q1 2023, Mercedes-Benz: 2 year average 2021-2023. Persons 18+; SiriusXM: Ad-Supported: Spoken Word, Ad-Free: Music. Q: What is the model year and brand of your PRIMARY car or truck - that is, the one vehicle you spend the most time driving or riding as a passenger?

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Bolstering Fred Jacobs' long held position that satellite radio is broadcasters' biggest competition in the car, SiriusXM comes in second place almost across the board, although its share is dwarfed by that of AM/FM.

Combining SiriusXM's ad-free music channels with its ad-supported talk offerings nets a 12 share among Chevy drivers, 13% for Honda, 16% for Hyundai, 10% for Toyota, 19% for Ford, 17% for Nissan and 17% for BMW. The auto brands with the highest level of satellite radio consumption are Jeep (23%), Kia and Subaru (22% apiece), and Audi (20%).

"It's not surprising. If you can afford such a beautiful car, you are more likely than not to want to plunk down some extra money for that satellite radio subscription," Cumulus Media Chief Insights Officer Pierre Bouvard says in a post on the company's blog.

For automakers, the study – conducted by the Audio Active Group of Cumulus Media and Westwood One – answers the questions: “What do drivers of my vehicles listen to in the car?” And “How do the audio habits of drivers of my brands differ from the U.S. overall?”

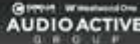
The in-car audio habits of high-end vehicle owners differ from those of more modestly priced vehicles. Among BMW owners, 18% of in-vehicle audio consumption is spent listening to music videos on YouTube. Audi drivers spend 11% of their in-car audio time with their owned music and 10% with podcasts. Still, AM/FM radio has a dominant 73% share of ad-supported audio among drivers of German luxury brands.

Examining listening among all drivers to all forms of audio in the car, 59% of all minutes spent with audio in the car go to AM/FM radio. A distant number two at 12% are the ad-free music channels of SiriusXM.

The shares for AM/FM radio listening rise to 85% when narrowing the focus to include just-ad supported audio and excluding such outlets as SiriusXM’s ad-free channels and subscription-based offerings from streamers like Spotify, Pandora, Apple and Amazon.

In the car: AM/FM radio leads share of ad-supported audio listening among major auto parent companies						
In the car (primary car driven) share of ad-supported audio time spent						
	Parent companies					
	General Motors	Honda Motor Co.	Hyundai Motor Group	Stellantis	Toyota Motor Industries	Mercedes-Benz Group
AM/FM radio	87%	89%	86%	83%	88%	87%
Podcasts	7%	6%	5%	8%	6%	2%
Ad-supported SiriusXM	3%	3%	5%	6%	3%	5%
Ad-supported Pandora	2%	1%	4%	2%	2%	6%
Ad-supported Spotify	1%	0.4%	1%	1%	2%	0%

Source: Edison Research, “Share of Ear,” Q2 2022-Q1 2023, Mercedes-Benz: 2 year average 2021-2023. Persons 18+; SiriusXM: Ad-Supported: Spoken Word, Ad-Free: Music. Q: What is the model year and brand of your PRIMARY car or truck – that is, the one vehicle you spend the most time driving or riding as a passenger?

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Among Ford drivers, for example, AM/FM radio has an 87% share, distantly followed by podcasts (7%) and ad-supported SiriusXM (the spoken word channels which accept ads) at 5%. Ad-supported Pandora and Spotify only have a one share each.

“If Ford wanted to run ads targeting their owners and prospective customers in their vehicles, AM/FM radio would seem to be a good choice with an 87% share among Ford drivers,” Bouvard says in the blog post.

He elaborates further on the findings in a 10-minute video. "If we look at all of the brands, you can see a very consistent story for in-car, ad-supported share among all these different brands. AM/FM is in the mid- to-upper 80s Share Of Ear, very dominant with the exception of some of the German luxury brands. And number two, pretty consistently in the mid-single or mid upper digits is podcasting."

Bouvard sees two purposes for automakers in the new Edison data for individual auto brands. "First, it helps product design and operations teams at auto manufacturers understand the massive use of AM/FM radio among their customers," he says. "For the brand marketing teams, it shows how AM/FM radio is such a powerful marketing platform to reach American drivers to build auto brands."

Edison Research surveys 4,000 Americans annually to measure daily reach and time spent for all forms of audio. Since the inception of the "Share of Ear" study in 2014, Edison has asked, "What is the model year and brand of your primary car or truck – that is, the one vehicle you spend the most time driving or riding as a passenger?"