No habit, no listening. Radio and generation Z: snapshot of the audience data and the business strategy to connect with it

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Abstract

This article describes the most comprehensive study of the relationship between Generation Z and radio carried out in Spain to date, broadening the focus beyond data known from previous research and offering a structural view of the market from the perspective of media economics. An in-depth analysis of data previously unused in academic research, as well as interviews with the managers of various private radio companies (*Ábside Media*, *Atresmedia Radio*, *Podium Podcast-Prisa Radio*, and *Grup Flaix*), reveals the gradual loss of contact of Generation Z with this medium and highlights the characteristics of the low radio consumption by this cohort in Spain. Among other conclusions, the study identifies some of the factors which may prove relevant to attract this generation to content produced by radio companies, since there is the conviction that there is still time to reverse this situation. Examples include the development of exclusive digital content, brand maximization and community building, content designed and produced by Generation Z for Generation Z, the combination of paid and free access, and media literacy as a transversal public–private factor. This is a need that the sector must address as a whole.

Keywords

Generation Z; Radio; Audience; Listening; Media economics; Media management; Contents; Programs; Genres; Programming; Consumption; Audio communication.

1. Introduction

Radio has been steadily losing audience levels in Spain since 2012 (from 61.9% to 55.5% in 2021, according to the *Estudio General de Medios* [*General Media Study*, *EGM*]). This decline has been especially steep among Generation Z. Furthermore, radio has seen 40% of its advertising investment disappear (from €648M to €382M in 15 years) and is the medium with the lowest advertising return on its digital inventory: just 3.3% of the investment it secured in 2021 came from this market, while for printed press –a sector whose adaptation to new media consumption habits was predicted to be difficult– the digital advertising revenue share has already reached 54.9% (*Arce Media*, 2021).

According to the *Digital News Report España* (2021), the number of people who obtain their news through radio is falling, especially in the 18–34 age bracket, where it barely reaches 14%. It is precisely here where the use of social networks (*Instagram*, *Twitter*, *TikTok*, and *Twitch*) to consume news reaches its maximum, up to 64%. Moreover, this shows no signs of changing in the near future, as the same report asserts that these young people feel far removed from the way they are depicted in traditional media (**Negredo**, 2021). Generation Zers mainly inform themselves through social networks, which are plagued with fake news (**Pérez-Escoda**; **Barón-Dulce**; **Rubio-Romero**, 2021*)*, although radio remains the most trustworthy medium (as repeatedly reflected by the Eurobarometer, most recently in its winter 2021/2022 edition). The same also occurs with university students, who would be expected to demonstrate a more critical and educated approach to media consumption (**Pérez-Escoda**; **Pedrero-Esteban**, 2021).

The drop in consumption is not homogeneous, as it varies among formats. Nor is its decline worldwide, as the medium has held out better in other countries in our cultural sphere. During the last 5-10 years, the loss of audience among the members of Generation Z in France and Spain has been 18% and 16%, respectively, while in cases such as Germany, the drop has amounted to just 9%. It bears noting that in both France and Germany, the market penetration for this cohort was greater than it was in Spain (**Mars**, 2021). However, the differences do not stop there: in Australia, penetration reached 87% in the 10-17 age cohort and 75% for ages 18-24, with constant growth over the last 5 years (**Cheick-Hussein**, 2021).

Various business initiatives being brought to term in both our country and the rest of Europe have suggested the relevance of the research topic proposed. Some examples include the *La Ràdio i els joves* seminars of the *Catalan Radio Association* (*ACR*), specific studies conducted by the *European Group of Television Advertising* (*EGTA*), reports from the *European Broadcasting Union* (*EBU*) or the British *Radiocentre*'s publication on Generation Z in Europe.

The existence of data on this generation's rising contact with spoken sound content may also prove instructive for radio companies. According to *Edison Research*, listening to spoken content in the United States has increased by 40% in the last 7 years. This growth is explained fundamentally by the greater consumption of podcasts among the youngest audiences: a growth of 116% in the case of Generation Z (*Edison Research*, 2021; 2022).

Scientific literature is starting to broaden the research perspective with results that address the gap between radio and young people: comparisons between distinct markets (**Espinosa-Mirabet**; **Ferrer-Roca**, 2021), the success story of *RAC 1*, a generalist with a high proportion of young listeners (**Espinosa-Mirabet**, **Gutiérrez**; **Martí-Martí**, 2021), the role and function of the public service (**Lowe**; **Maijanen**, 2019), radio consumer psychology applied to this generation (**Lissitsa**; **Tabor**, 2021), etc.

This paper aims to contribute knowledge on a seldom-researched medium (**Piñeiro-Otero**, 2017; **Repiso**; **Torres-Salinas**; **Delgado-López-Cózar**, 2011) and to do so from a perspective atypical in Spain, discussing the relationship between radio and Generation Z through the lens of media economics. This trend has historically been seen as a polar opposite to the political economy of communications (also known as the critical approach), ignoring that the two have evolved side by side, the fruit of one another's mutual influence (not exempt from reprimands) and that of other trends (i.e. the evolutionary or institutional approach) (**Cunningham**; **Flew**; **Swift**, 2015; **Bonet**, 2017). As some of this perspective's main representatives asserted in their day, media economics does not, strictly speaking, exist; rather, there is a compilation of theories taken from economics and management and applied to the functioning of media (**Picard**, 2006; **Albarran**, 2012). Not in vain have the multiple editions of one of the most representative works combined media economics and management into the same field of study: *Handbook of Media Management and Economics* (**Albarran**; **Chan-Olmsted**; **Wirth**, 2006; **Albarran**; **Mierzejewska**; **Jung**, 2018).

Despite its unique attributes, radio as an industry (especially commercial private radio) operates on the basis of a more or less consensual system, of which audience measurement represents a fundamental pillar.

> "Thus, economics is concerned with *what* is produced, the technology and organization of *how* it is produced, and *for whom* it is produced." (**Owers**; **Carveth**; **Alexander**, 2004, p. 5)

Facing a dual market, radio operates by offering content to its listeners and selling access to these listeners to advertisers in search of their ideal target (**Albarran**, 2004). Radio companies create a product but

> "participate in two separate good and service markets… and performance in each market affects performance in the other." (**Cunningham**; **Flew**; **Swift**, 2015, p. 18)

The present article addresses what audience studies have been demonstrating for some time: the "for whom" is in decline and, with it, the access being offered to advertisers. The system is teetering and radio operators must confront it.

The small number of academic papers on radio published in recent decades, at least in Europe, have prioritised approaches drawn from gender theory or cultural studies, and fewer authors have applied the critical approach and, still fewer, media economics. This paper, from the point of view of those responsible for taking the decisions which steer their companies, will make it possible to analyse causes, decisive factors and possible actions with the goal of transferring knowledge to the business world, as the same concern is demonstrably on the rise in the university realm and the radio industry alike. Nonetheless, academia produces knowledge which does not always reach companies.

Thus, the present paper aims to go beyond the data known until now and, after describing the relationship between Generation Z and radio, will offer a structural vision of the market by applying analytical tools from the perspective of media economics: why this market's offering fails to attract the audience in question and if this is to any extent reversible.

The paper responds to the following questions:

P1. How does Generation Z in Spain listen to radio?
 P1b. When, where and what genres does it consume?

P2. How do companies analyse the relationship between Gen Zers and radio?
 P2b. What structural factors do these companies believe can be addressed in order to attract this generation to their audio content?

The first two questions will be answered with a thorough analysis of data from the *EGM* (never before used for this academic research purpose in Spain) and questions P2 and P2b through four semistructured in-depth interviews with multiple professionals from the realm of private radio company management. The paper examines only the three major private radio operators in Spain. Their turnover volume and revenue model, based almost exclusively on advertising, raises more questions for these operators in the face of the aforementioned fracturing of the dual system.

2. Theoretical framework

2.1. Radio and Generation Z in Spain

The convenience of dividing the population into generational segments, and of attributing common values, ideas, beliefs and attitudes to these segments based on the fact that they share similar experiences and have lived through similar social contexts and political and economic events, has already been demonstrated. This segmentation process proves particularly useful when it comes to studying radio consumption behaviour (**Lissitsa**; **Laor**, 2021).

The values, preferences and habits of cultural consumption transcend borders in our field of study: in a seminar on radio and Generation Z organised by *ACR* (2021), the speakers agreed that this cohort of digital natives lives permanently connected, through their smartphones, to social networks or content in which video plays an essential role; what they consume is associated with their values; they are used to consuming this content whenever they want; they create their own audiovisual products; they are interactive and it is difficult to capture their attention. Thus, to their ears, all content proposals are equal and it is here where the radio operators' doubts begin on how to access this generation: go where they consume?; a specific application?; co-branding through an aggregator that dilutes one's own brand? (**Fernández-Quijada**; **Mars**; **Pedrero-Esteban**, 2021).

Add to this centrality of mobile consumption the fact that Gen Zers use messaging as a community-building tool. Part of their media consumption comes from these networks, not only for entertainment but also for news content. They fail to question the algorithm because it saves effort, and they ignore programming lineups except when these lineups adapt to their own activities (hence the consumption during car trips). The period of contact tends to be brief, and the content, with few technical complications, is accessed instantaneously (**Mars**, 2021). Not in vain does Albarran highlight researchers' interest in studying intensive mobile phone use through the prism of economic concepts like the allocation of time and money and elaborate on it when describing future research areas for the discipline of media economics:

> "This heavenly-driven technology era will drive much of the interest of researchers in this current era of media economic research." (**Albarran**, 2019, p. 10)

The previous quantitative and qualitative-quantitative research carried out in Spain points to radio's loss of contact with this generation in all cases and offers elements which merit some reflection but have yet to take hold in the industry, despite this industry's concern. The speed at which developments occur should make us prudent about formulating long-term affirmations, because consumption phenomena of this generation which seemed resistant over time have changed in very few years. The fact that portable devices have indeed replaced radio, contrary to the predictions of **Perona-Páez**, **Barbeito-Veloso** and **Fajula-Payet** (2014), serves as an example. This paper will also make it possible to go one step beyond the conclusions obtained until now on radio consumption and Gen Z (for example, the general data

> In other countries representing equivalent markets, Gen Z audience has grown to 87%

on consumption of the medium from **López-Vidales** and **Gómez-Rubio**, 2014). It will also broaden, from the quantitative field, the contribution of **López-Vidales** and **Gómez-Rubio** (2021) on the consumptions of Gen Zers compared with Millennials' and where the drop in radio's penetration among these two cohorts can be noted. With access to *AIMC*'s full reports, we will therefore be able to delve deeper into what specific products young listeners are attracted to, when they consume them and how.

Pedrero-Esteban, **Pérez-Maíllo** and **Sánchez-Serrano** (2019) describe the challenges the radio sector must confront in the face of the disaffection of "digital natives": radio companies lack audience data on children under 14 (the cut-off age for the *EGM*); without this data, companies whose main source of revenue is advertising lack access to the brands which target this population segment; therefore, the radio industry has ceased to produce specific content for children's audiences. Paradoxically, this absence of product impedes these generations' present and future contact with the medium given that cultural consumptions are habit forming (**Hoskins**; **McFadyen**; **Finn**, 2004, p. 73). The future viability of these companies is jeopardised as they watch the generational turnover of their audience progressively shrink.

No less pressing is the challenge of digital distribution and the competition posed to radio by the growth of podcasting platforms, as noted by **Terol-Bolinches**, **Pedrero-Esteban** and **Pérez-Alaejos** (2021).

Radio companies have stopped investing in programming geared toward children and preadolescents because the *EGM* does not include them in its universe. To young people aged 14 years and older, radio content is becoming less and less attractive. Internet has put more inviting alternatives within their reach even when it comes to listening to music, a referential sphere of contact with the medium for this generation until just a few years ago. Radio no longer leads the expansion of the audio offer where *Spotify*, GAFAMs, etc. have entered with force.

The diagnosis, as consistent as it may well have been, has not been accompanied by actions to reverse it:

> "Affinity-based content could constitute a formula for attraction, but it is music radio which has the interesting challenge of seducing users in an ecosystem where music is consumed in a direct, personalised and instantaneous way, in real time and through on-demand music services (*Spotify*, *Apple Music*, *Deezer*, etc.) or audiovisually (*YouTube*)." (**Moreno-Cazalla**, 2018, pp. 477-478)

All these contributions support the initial affirmation: Generation Z views radio as something foreign.

2.2. Media economics

Despite its importance for the proper interpretation of the media ecosystem, the contribution of economics to the field has been smaller than it should have. The theoretical perspective known as media economics offers a structural view of the data obtained on the relationship between Gen Z and the medium, relating supply and demand. Economic efficiency is both the aim of and the explanation for the behaviour of industry, business and consumers, a fact clearly demonstrated by this school of thought (**Cunningham**; **Flew**; **Swift**, 2015). The constants it describes for the structure of the market and the theory on the firms' behaviour serve as a basis: the concepts of maximising profits, applying incremental analysis, managing uncertainty and risk (amplified in the media) or the possible causes in the change in demand (**Hoskins**, **McFadyen** and **Finn**, 2004).

With regard to its environment, **Doyle** (2013) takes the construction of radio as a consumer product of eminently local production to the extreme: the digital disruption destabilises radio while simultaneously generating new opportunities for it in this dual market: content for listeners and access to listeners for advertisers. There exists, therefore, a correlation between product, audience and revenues (**Hoskins**; **McFadyen**; **Finn**, 2004) which imperatively drives the media to secure advertising investment, subjecting radio to the stringency of the advertising industry's models and structures of decision and the criteria guiding its investment (**Doyle**, 2013).

The nonexistence of audience data on minors under 14 years old in Spain makes it unfeasible for advertisers to invest in programming tailored to this age group. The initiatives launched from the business sphere (*Onda Mini*, for example) had to be abandoned. Meanwhile, the correlation between potential audience volume and demographics has entailed an increase in investment aimed at the broadest populational cohorts (the lucrative baby boom market) and the consequent abandoning of sparser cohorts with less purchasing power (**McClung**; **Pompper**; **Kinnally**, 2007, p. 104).

The comparison with other markets illustrates the importance of the specific offering from the public sector for the child audience and Generation Z. Beyond the controversies surrounding its competitiveness or complementarity, beyond the cost-benefit analysis in business terms, the introduction of variables associated with the values of a public service mission is what explains the allocation of governmental resources (**Hoskins**; **McFadyen**; **Finn**, 2004) which have spearheaded a remarkable variety of radio or audio formats specifically for child and youth audiences in these countries (Australia and Great Britain as a paradigm). For instance, the *European Broadcasting Union* (*EBU*), an association of public service media organisations, views connecting with young audiences as one of the means by which these organisations add value to society (*EBU*, 2021).

> Contrary to what might be assumed due to the rise of the podcast, this format still has little weight as a listening platform for Generation Z

We thus arrive at another pillar of this paper: media as an experience good.

> "Experience goods contain attributes that in the main can only be evaluated by the consumer after purchase through experience with the good." (**Hoskins**; **McFadyen**; **Finn**, 2004, p. 76)

Thus, any product hoping to connect with Gen Z will have to keep in mind which attributes this media product must contain depending on its perceptions of utility in order to be, at the very least, tried. Hence the importance of both media literacy (these generations' gateway to the medium and vice versa) as well as tailored content, produced in the public or private sphere.

When research has focused on demand rather than supply (**McClung**; **Pompper**; **Kinnally**, 2007), it has managed to illustrate the psychological process (perception of attributes and choice) through which new media are adopted. One medium does not necessarily replace the next: they may complement each other according to how their usefulness and value are perceived. Thus, any efforts made by the radio medium to attract Gen Z are not necessarily condemned to failure.

Our theoretical circle closes with another perspective, that of media management and its interdependence with media economics, already mentioned at the start of this article, which helps explain the conservative nature of the decisions that maintain the current status quo of the offering, how this uncertainty is ultimately paralysing, and how risk is measured in economic terms. There is no guarantee of success when establishing business strategies because it is impossible to keep all external variables under control. This factor of uncertainty is then multiplied in the media industry. The importance of this particular aspect is well illustrated by the call to generate more research into how media firms react to uncertainty and risk (**Picard**, 2018, p. 116).

For **Doyle** (2013), the components of the virtuous circle in the management of media products are high investments combined with long periods of time to consolidate the offer. However, in many cases, either the period of time or the amount to invest exceeds what is possible in the annual budgets. Growths in audience and advertising revenue in the media occur slowly (except in the case of radio stars when they switch stations). Thus, any incremental analysis applied to the audience obtained from an investment in such an uncertain context would explain the absence of audio content tailored to these population segments produced by private or public radio companies (**Hoskins**; **McFadyen**; **Finn**, 2004).

This combination of factors also explains these companies' renunciation of the search for adjacent opportunities (**Küng**, 2017) to multiply their offering toward other markets and products (an area into which expansion toward this target group would fall). Furthermore, in the case of private corporations, the financial analyses allow no discretionary margin. Prudence wins out over risk, despite this being a winner-takes-all industry: successful initiatives reap a disproportional part of the reward (**Hesmondhalgh**, 2019).

Bonet and **Sellas** (2019) provide an example of paralysing uncertainty and delayed decision-making on investments when they refer to radio companies' doubts about the distributor in the new audio market (in the context of the battle between broadcast and broadband). This behaviour is not limited to the leaders of private companies. It also happens in public companies, as demonstrated by **Lowe** and **Maijanen** (2019, p. 6): attracting young audiences is inherent to these companies' public service mission. However, this requires innovation, and organisations –even public organisations– generally prefer to exploit already established products with familiar procedures and ways of thinking. Successful, long-lived businesses are risk-averse.

3. Methodology

This paper will respond to the questions posed through a combination of quantitative and qualitative analysis: on the one hand, exploiting the data from the *EGM Radio* reports and, on the other, conducting in-depth semistructured interviews with experts in management of the sector.

The quantitative analysis is based on the data obtained by *AIMC* for the *EGM* reports, which amounts to 78,000 interviews in a sample of people over age 14. From this sample, 7,491 people between the ages of 14 and 24 were interviewed –a sample size proportional to this age cohort's share of the total population–, with a similarly proportional spread by community, province and household size.

The authors of this paper were given access to the non-public (only for associates) content of the aforementioned reports, never before used to examine the specific consumption of Generation Z. The most recent articles on Generation Z in Spain (**Espinosa-Mirabet**; **Ferrer-Roca**, 2021; **Barrios-Rubio**; **Gutiérrez-García**, 2021; **Espinar-Ruiz**; **González-Díaz**; **Martínez-Gras**, 2020; **Soengas-Pérez**; **López-Cepeda**; **García**, 2019; **Catalina-García**; **López-de-Ayala**; **Martín-Nieto**, 2017; **López-Vidales**; **Gómez-Rubio**, 2021) are based on limited sample sizes in terms of geography and profile (basically among university students). *AIMC*, meanwhile, guarantees the representativeness of its results with respect to the universe as a whole, as the intended users of this data need reliable information in order to make strategic decisions on advertising investments or programming.

> There is a common opinion that music, while keeping its presence, is not going to be the main appealing offer to attract young people to radio

Table 1. Previous studies

Authors	Sample size	Segmentation
Espinosa-Mirabet; **Ferrer-Roca**, 2021	200	Strudents from 2 universities
Barrios-Rubio; **Gutiérrez-García**, 2021	160	Strudents from 2 universities
Espinar-Ruiz; **González-Díaz**; **Martínez-Gras**, 2020	168	Strudents from 1 university
Soengas-Pérez; **López-Cepeda**; **Sixto-García**, 2019	100	Strudents from 5 universities
Catalina-García; **López-de-Ayala**; **Martín-Nieto**, 2017	214	Strudents from 1 university
López-Vidales; **Gómez-Rubio**, 2021	1,908	Sociodemographic variables

This paper offers, firstly, a brief diachronic view of consumption minutes and penetration to situate this generation's loss of contact with the radio medium and, secondly, a more thorough synchronic analysis with data from rolling year 2021. For the initial balance, the years 2009, 2012 and 2021 are taken as temporal references. The individuals who make up Generation Z began to reach the age of 14 (lower limit for the *EGM* sample) in 2009. The table also shows data from 2012, as this year represents the historical peak of penetration of the radio medium (61.9%), which had not been reached since 1982 and has not occurred again.

Conclusions on recent consumption are drawn using data from the third wave of 2021 and the corresponding rolling year, the closest to the date this paper was finished. In this case, the analysis rests with the weekly accumulated audience data. The data is used to determine results for the following quantitative variables: a) emission wavelength or platform, b) place of listening, c) type of radio (musical and generalist) and d) timetable of consumption. Both absolute and percentage-based data is provided whenever doing so is relevant to frame its representativeness.

For both thematic and generalist programming formats, *AIMC* offers Gen Z data in two segments (ages 14-19 and 20-24). The aggregated data for the full cohort (ages 14-24) has been requested from the source, *AIMC*. As for analysing the private generalist formats, the hourly audience data makes it possible to extrapolate which programmes, and therefore which genres, attract this generation to conventional radio. In this case, the authors of this paper have only considered hours with a Gen Z listening percentage equal to or greater than the station's total average and with a significant absolute number of listeners with respect to its total audience (excluding figures which are high percentage-wise but irrelevant in absolute terms). The hours with more absolute audience typically reflect the same average listening percentage for Gen Z (between 2.2% and 2.4%). Thus, being a high number of listeners it has not been considered significant for the purpose of this article, given that it is non-specific consumption.

For the much-more-numerous music formats, we have only included national stations whose Gen Z audience listening percentage surpassed an average of 7.1% (to take only the stations most attractive to this target group into account) and, equally, with relevant absolute figures in comparison to the total audience share. Initially, the stations taken into account include *MegaStar*, *Flaix*, *Los 40 Urban*, *Flaixbac*, *Hit FM*, *Los 40* and *Europa FM*. Two products from the Catalan group *Flaix* (*Flaix FM* and *Flaixbac*) have also been included due to their importance both in absolute terms (number of listeners superior to national stations despite not having the same coverage) and relative terms (with two products with the highest penetration rate in this generation since 2013, occupying 2 of the top 3 positions in the ranking of Catalonia).

The analysis of this data makes it possible to illustrate the radio consumption patterns of Generation Z in Spain. This part of the research was facilitated by the collaboration of Virginia Vides, assistant director of Marketing and Content at *Atresmedia*, and José Andrés Gabardo, technical director at *AIMC*, who offered their support in the process of analysing and using the *EGM* data.

Meanwhile, the qualitative section of analysis was derived from the results of in-depth interviews with leading professionals in the sector. They were given semistructured questionnaires which contemplated new questions based on the interview subjects' responses and some specific questions in relation to their positions. The questions were grouped into thematic blocks and addressed the subjects' opinions on Gen Z's disengagement with radio, possible strategies for attracting this generation (content, distribution, etc.), the importance of creating brand and community, business models and risk as a management factor. The interviews were transcribed and, later, the responses were grouped into each block. These are the 4 interview subjects, executives in charge of content and marketing at the three main private corporations in Spain:

- José María Moix, director of Programmes and Marketing at *Atresmedia Radio*;
- Lourdes Moreno-Cazalla, executive head of Production, Distribution and Audiences at *Podium Podcast-Prisa Radio*;
- Javier Llano, musical stations director at *COPE-Ábside Media*.
- Carles Cuní, president of *Grup Flaix*, as an example of a success story.

After completing the interviews –performed simultaneously with an advanced phase of quantitative analysis– the responses were grouped into the different blocks which structured the questionnaires. The most relevant contributions are gathered in a summary box which may be consulted in the results section.

Records of *AIMC*'s permission to publish *EGM* data, as well as of the interview subjects' informed consent, are available.

4. Results

4.1. Data analysis

4.1.1. Slow but constant fall in recent years

To put Generation Z's radio consumption in context, here follows a brief summary of the state of the question for the audience as a whole between 2012 and 2021. The data from *AIMC* reveals an evident drop in radio penetration and listening minutes in Spain. If we examine the historical series from 2012 (the last year when radio surpassed a penetration rate of 61.9%), the loss of listeners is 7.3%; it falls across all cohorts and amounts to a loss of 19.3% in the cohort at the centre of this paper. The average listening time has lost 22 minutes from the 114 it reached in 2012. Thematic radio fares worse than generalist radio, both in consumption (it has lost 15 minutes as opposed to 4) and penetration (it has lost 5.7 percentage points against the 1.9 of generalist radio).

The rate of consumption by wavelength type indicates that MF (modulated frequency) continues to be the most common form of contact with the medium (46.9% of the audience) but has dropped from 52.4% in 2009 and 56.9% in 2012. This loss has not been compensated by online radio listening. Linear or podcast listening reached 7.8% in 2021, having only advanced 5.7 points in 9 years. Since 2018, *AIMC* has separated its data on podcasts and streaming, but both forms of listening have grown extremely slowly and hardly contributed to radio's total listenership, although **Vides** (2021) believes podcast consumption may in reality be higher (taking as a reference, for example, the *IAB* data) because, online, pre-recorded consumption is not differentiated from live consumption, and an evolution in data integration would be needed to reconcile these results. Nonetheless, online consumption has indeed risen in comparison to MF.

Finally, the data on listening location reflects the major role home listening plays for the general population, with 54.9% of the share in 2021. Since 2009, domestic consumption has remained the most stable, and listening in the car is what has grown most (to 23.4%) in detriment to listening at the workplace (from 26.1% in 2009 to 19% in 2021).

4.1.2. Evolution of radio consumption in Generation Z

Having briefly described some of the data on radio consumption in Spain, let us now examine Generation Z's differential behaviour, from both the diachronic and synchronic point of view.

Between 2009 and 2021, the 14-24 age cohort has fallen by 140,000 inhabitants, but the loss for radio has been much worse, as this figure has been multiplied by 4.5, which represents a loss of 614,000 listeners. Music radio has also fallen by 10 percentage points within this period (when this cohort had amounted to the bulk of its listenership), while in the case of generalist radio it has held steady (while not amounting to more than 11% of its total listenership).

Table 2. Radio penetration in Spain in 2009 and 2021

		2009	2021
14 to 24 years old	Listeners (in thousands)	2,970	2,356
	Percentage of listeners over the total population in the age range	54.5%	44.6%
Total population	Listeners (in thousands)	21,836	22,364
	Percentage of listeners over the total population	55.3%	54.6%

Source: *AIMC-EGM* from February to November 2009 and 2021.

The contrast is much greater with the penetration of 2012, given that this cohort's audience share was 2% higher than the average and reached 63.9%. In 2021, the average loss for the population as a whole was 7.3%, but in this cohort the fall was 44.6% (19.3% less).

A similar difference appears in the average consumption time, which between 2009 and 2021 fell by 14.6% for the whole of the universe considered while for Generation Z the loss was almost 50%.

Table 3. Average daily radio consumption time in minutes

	2009	2021
Total population	107.7 min	92.1 min
14 to 24 years old	97.1 min	48.8 min

Source: *AIMC-EGM* from February to November 2009 and 2021

In terms of listening throughout the day, prime time in generalist formats has been brought forward and there has been a change in consumption at night, where the peak which once coincided with this generation's contact with night-time sports programmes has disappeared. Additionally, for music radio's curve of contact throughout the day, prime time has moved back a few hours from 1 pm, ending much earlier due to this generation's routines.

4.1.3. Radio consumption by Generation Z in 2021

As for the type of programmes Gen Z comes into contact with, music radio is observed to be chosen three times as often as generalist radio is. Nonetheless, the figures in question represent barely a third of this cohort's population. Furthermore, if we take the data as it originally appears in the *EGM* report (in two age ranges, 14-19 and 20-24), the numbers are lower in the first group, which would indicate a worse prognostic for the coming years as in the absence of contact, future consumption is unlikely.

Table 4. Radio listening by Generation Z by programming type in 2021

	Population (in thousands)	Radio listening	Generalist	Musical
Total population	40,948	54.6%	28.3%	29.1%
14 to 19 years old	2,923	42.9%	12.6%	31.1%
20 to 24 years old	2,364	46.5%	13.5%	33.9%
14 to 24 years old	5,287	44.5%	13.0%	32.4%

Source: *AIMC-EGM* from February to November 2009 and 2021

MF radio continues to serve as the most common form of contact with the medium for this cohort, without diverging much from what is observed for the rest of the universe. Here, as well, the online listening datum indicates this generation's estrangement from radio, as streaming has failed to grow as significantly as might have been expected from a generation of digital natives and only listening via podcast slightly surpasses the total audience average.

Table 5. Radio audience by listening platform

	Population (in thousands)	Radio listening	Radio MW	Radio MF	Radio Internet	Internet streaming	Internet podcast	Radio DTT
Total population	40,948	54.6%	1.4%	46.9%	7.8%	5.9%	2.3%	1.7%
14 to 19 years old	2,923	42.9%	0.3%	36.0%	6.6%	4.2%	2.5%	1.3%
20 to 24 years old	2,364	46.5%	0.3%	39.3%	7.9%	4.8%	3.5%	1.3%
14 to 24 years old	5,287	44.5%	0.3%	37.5%	7.2%	4.5%	2.9%	1.3%

Source: *AIMC-EGM* from February to November 2009 and 2021

Una de las diferencias en los hábitos de esta generación respecto del promedio de la audiencia la encontramos en el lugar de escucha. Para esta cohorte el coche es el primer lugar de contacto con la radio y supera en 10% el dato de la audiencia total. Y solo un tercio del consumo declarado se produce en casa.

Table 6. Audience by place of listening in 2021

		Total population (in thousands)	14 to 24 years old
	Population	40,948	5,287
Home	Total listeners	12,440	868
	%	55.6%	33.4%
Car	Total listeners	10,058	1,452
	%	45.0%	55.8%
Office	Total listeners	2,250	153
	%	10.1%	5.9%
Other places	Total listeners	899	129
	%	4.0%	5.0%

Source: *AIMC-EGM* from February to November 2009 and 2021

4.1.4. Consumption of music formats

The order of the table reflects the greater contribution of listeners from this cohort to each station, regardless of the absolute number of listeners and always above the average percentage. As for consumption throughout the day, the figures showing higher penetration coincide with the respective stations' moments of more audience and follow the daily routines of this segment of the listenership, with two peaks, one in the morning after 8 am –but which ends before generalist radio's peak, after 10 am– and a long peak between 8 and 11 pm.

Table 7. Generation Z as a percentage of total population, of total radio audience, and of total music radio listeners, by channel (2021)

	Population	Radio	Music radio	*MegaStar FM*	*Flaix*	*Flaixbac*	*Los 40 Urban*	*Hit FM*	*Los 40*	*Europa FM*
14 to 24 years old	6.5%	5.2%	7.1%	14.8%	13.9%	12.4%	12.1%	10.1%	10.2%	8.3%

Source: *AIMC-EGM* from February to November 2009 and 2021

4.1.5. Consumption of generalist radio

The contribution of Generation Z to generalist radio is very low and there are barely any differences between the three main private Spanish stations.

Table 8. Generation Z as a percentage of total population, total radio audience, and total general radio

	Population	Radio	General radio	*SER*	*COPE*	*Onda Cero*
14 to 24 years old	6.5%	5.2%	2.8%	2.4%	2.4%	2.2%

Source: *AIMC-EGM* from February to November 2009 and 2021

This generation's audience curve in generalist radio hits a single pronounced peak coinciding with the prime-time hours of the audience as a whole (around 8 am). However, the peak which once coincided with nighttime sports talk show broadcasts has dropped significantly, although it continues to represent one of Gen Z's few moments of contact with these stations, with absolute figures much lower than those of a few years ago.

Table 9. Time slots with the highest generation Z audience share.

Time slot	Program	Broadcaster	Genre	Listeners 14 to 24 years old	
				n	%
Monday to Friday					
8:00 to 9:00 h	*Hoy por hoy*	*SER*	Informative section in magazine	60,000	4.6%
23:00 to 23:30 h	*El partidazo de COPE*	*COPE*	Sports	32,000	8.9%
8:00 to 9:00 h	*Más de uno*	*Onda Cero*	Informative section in magazine	38,000	5.4%
14:00 to 15:00 h	*14 horas*	*RNE*	News	12,000	7.2%
Saturday					
7:00 to 7:30 h	*Matinal en la SER*	*SER*	News	33,300	6.6%
18:00 to 19:00 h	*Carrusel deportivo*	*SER*	Sports (retransmission)	55,000	13.9%
19:00 to 20:00 h	*Carrusel deportivo*	*SER*	Sports (retransmission)	37,000	13.2%
0:00 to 1:00 h	*El larguero*	*SER*	Sports	38,000	8.6%
16:00 to 17:00 h	*Tiempo de juego*	*COPE*	Sports (retransmission)	35,000	11.0%
23:00 to 0:00 h	*Tiempo de juego*	*COPE*	Sports (retransmission)	29,000	6.3%
21:00 to 22:00 h	*Radioestadio*	*Onda Cero*	Sports (retransmission)	32,000	34.8%
Sunday					
14:00 to 15:00 h	*Hora 14 fin de semana*	*SER*	News	42,000	14.4%
0.00 to 1.00 h	*Tiempo de juego*	*COPE*	Sports (retransmission)	48,000	8.1%

Note: The percentages expresses the weight of Gen Z listeners in the total radio audience at that hour.
Source: *AIMC-EGM* from February to November 2009 and 2021

Consumption corresponds mainly to sports-related content and, for the station *SER* alone, news content as well.

When these figures are intersected with the place of listening, it appears that on weekdays, in-car consumption of the news content analysed is 10% higher than the audience average. On the other hand, the mainly at-home consumption on weekends corresponds to sports content.

4.2. Interview analysis

According to this data, 7.1% of Generation Zers tune in to music radio, 2.8% tune in to generalist radio, and a universe of zero connection with the radiophonic system is observed.

The following table displays the opinions expressed by the interviewed radio content directors on this distance between radio and Generation Z.

Table 10. Opinions of those interviewed about the distance between radio and generation Z

	Javier Llano (*Ábside Media*)	**José-María Moix (*Atresmedia Radio*)**	**Lourdes Moreno-Cazalla (*Podium Podcast, Prisa-Radio*)**	**Carles Cuní (*Grup Flaix*)**
Reasons for the lack of connection between radio and younger generations	The radio conglomerates have simply put their stake in segments with more potential audience, which are also where more profits can be earned: they have stopped serving the youngest listeners, leading to a steady rise in the average age of music audiences. Radio is an inherited medium and the chain has been broken. Media education and radio ought to be included in curriculum designs, as a mainstream element of competence on par with reading, writing, teamwork, etc.	The low birth rate is inverting the pyramid. This implies the reduction of this target group year after year, and it is occurring at an accelerated rate.	Technology is causing this generation's options to increase and even determine the form of consumption.	Listening to the radio is an acquired habit. The challenge for the sector as a whole is to make young people perceive that listening to the radio is useful to them.

	Javier Llano (*Ábside Media*)	**José-María Moix (*Atresmedia Radio*)**	**Lourdes Moreno-Cazalla (*Podium Podcast, Prisa-Radio*)**	**Carles Cuní (*Grup Flaix*)**
The importance of brand and community creation	A youth brand with an impact has yet to be created. Companies know what its characteristics should be and the market is there, but no one dares to take the step. It will have to be multi-platform.	Radio companies have failed to keep pace with online platforms. Their brands have lost value, they represent what's old, what's traditional. Alternatives must be sought where online platforms cannot compete.	It is very important to generate communities, and these are created around a passion. It could be sports, music, niche information... Both *SER* and *COPE* have been testing it out in podcast form.	The brand has brought *Flaix* an indisputable notoriety and capacity to generate community, but with modifications in the product, on pace with the changes in musical tastes.
Programming strategy: who	The one who gets through the most is someone who, from their own generation, sends out the message with empathy, because they know their peers' concerns. It has an aspirational and identity component at the same time.	Peer recommendation is the best guarantee of new contacts for the product: from their generation for their generation.		The best prescriber is someone from their own generation. The risk of distancing exists if the design of the programming strategy is left exclusively in the hands of adults.
Programming strategy: what	Digitalisation is on programmers' side: now they can know what attracts this generation, because consumption can be measured in real time. The value of voice is making a comeback, for this age range and all others.	Companies have the obligation to try to programme for this generation and to do so with differentiation (with respect to a playlist or any other spoken product from the platforms). The risk of not doing so implies the disappearance of the radio medium.	Radio is the industry which must provide the audio content that could interest Generation Z. That's why it's so important to know their habits, as well, and to go to the platforms they consume.	*Flaix* aims to provide a response to the interests it detects in the public at which it is aimed. To do so, it uses all the tools available to find out what they want to hear, going where they are. In musical programming, most stations use the callout method. This means they take few risks. *Flaix* continues to pursue the new strategies they believe will work, accepting the uncertainty this entails.
News		It does not have relevant appeal. Today, the consumption of news for this generation is social and not personal, moments of shared listening where it is the adult who decides.	A segment of this generation selects news content on the radio which the digital realm does not provide, and they give it more credibility.	News broadcasts are only programmed in the morning. They are brief bulletins based on the editorial criteria of service and proximity.
Sports	Sports could be an opportunity to attract the youngest listeners, especially in contrast with television. Radio has proven unable to attract youtubers, who have grown professionally outside a medium which should have been the natural platform for their development.	The live content consumed during sports broadcasts is what explains the concentration of Gen Z listeners on weekends.	They are an excellent way to create community around a passion. But their audience retention potential is much higher online.	*Flaix* only broadcasts Barça and initially as a marketing tool. The loyalty of sponsors and qualitative data such as participation will be the measure of its continuity. It also represents a challenge: to earn the trust of the juvenile audience by offering alternative sports content from that of conventional stations.
Content for children and preadolescents	It would have to be a digital product starting at the age they begin to use mobile phones. It could be a function of the public service, although this wouldn't seem to be the moment. This content is related to the importance of media education.	There is no radio for the child audience because it is not aspirational (for either parents or children) and because the audience measuring system leaves out minors under 14 years, unlike the audience meter in television. This makes it difficult to capitalise on it commercially.	Children are growing up very fast and the more they are infantilised to attract their media consumption, the farther away they drift. The term "children's" should be replaced with "family." Adults accompany children, but the child is the protagonist.	The sector has not asked itself which content would be appropriate to attract this generation. If they fail to acquire the habit of listening to the radio as children, they are unlikely to acquire it as adolescents and much less likely as adults. It is a problem faced by all companies in the sector.

	Javier Llano (*Ábside Media*)	José-María Moix (*Atresmedia Radio*)	Lourdes Moreno-Cazalla (*Podium Podcast, Prisa-Radio*)	Carles Cuní (*Grup Flaix*)
Relationship with online platforms	Stations must take a step forward in the creation of their own online environments, filled with information, music, enter-tainment... They have to get ahead of a trend soon to dominate: pay-per-listen.	Relinquishing control is a mistake. Radio companies will have to defend their product as a sector. Alliances with platforms in the short term may serve as a means to reach all au-diences, but in the medium and long term it is the true competitor, even above the other radio stations.	*Prisa* has been reaching agreements with platforms as a premium provider. The radio industry will have to foster these alliances as producers.	
Podcasting	It is an opportunity for the medium which must quickly be exploited. Radio companies must produce exclusive content for this generation, content which ends up setting trends and getting recommended, not segre-gated from an earlier radio broadcast. The power of voice stands out as an element of attrac-tion to the content of radio companies, transcending the medium itself.	It is a magnificent opportu-nity to provide continuity to the consumption of one's own brand in a digital environment.	Radio companies can at-tract this generation, giving them the content which interests them. The podcast makes it possible to go into depth, creating communi-ties in the most convenient format to consume.	Waiting for the big radio operators to point the way to profitability
Business model	Radio stations are already generating content the audience would pay for. The current ad-based fun-ding model requires reach and large audiences and should be supplemented by payment-based models distributed in the radio companies' own environ-ments. He warns that, if this fails to occur, the sector will not survive.	The model of free access for the user in exchange for advertising will have to be replaced by the subscrip-tion-based model, because there is not enough business. The industry must be capable of combining both routes of revenue. Payment can be achieved thanks to the sum of a multitude of minorities.	There has to be free con-tent for this generation, but the model is only sustaina-ble with a combination of payment methods. Quality digital production is expensive and must be brought into relief, for plat-forms and aggregators and for the audience. The two business models should complement each other: reach (the job of radio com-panies as we know them now) and niche profitabi-lity, which can be arrived at through more specific high-quality content, for example through podcasts.	Internet presence has not yet been successfully mo-netised: it is still just a locus of expense.
Risk	The financial crisis has not made it easy to make decisions which would entail spending resources on an innovative activity, in a sector already in itself little prone to risk. The combination of all these factors is the "perfect storm."	*Europa FM* could consider projects of segmented, ver-ticalised contents, or lists based on distinct targets and musical groups, but the mere attempt is paired with certain costs with no clear return.		Taking risks has been the only possible way to stand out. For this reason he accepts that one of his two products on the market is permanently in the trial phase, exploring new territories.

6. Discussion

In light of the audience data expounded in point 4, this section analyses the companies' interpretation of the youngest generation's disengagement with radio, the possible tasks to complete to reverse this situation and the difficulties it could entail.

There exists an initial, purely demographic reason already mentioned by **Moix** (2021): populational decline is inverting the pyramid, which entails the shrinking of this target audience over the years and rapidly. If to this we add the fact that radio groups have placed their bets, as **Llano** (2021) sustains, on the segments with more potential audience –which moreover are also those with more profitability–, the result is that the youngest listeners have ceased to be served.

The second reason is the empowerment of adolescents and young people, underscored by all interview subjects. It is a power amplified by the intensive use of mobile devices which leads younger listeners to take control of the selection even in the car and even if they are not the ones driving.

The third reason is the rise in consumption based on the opportunity and accessibility of online platforms, which especially affects the musical lineup as mobile phones allow these platforms to satisfy the principle of immediate consumption against the linear offering of the radiophonic product. Playlists beat radio formats.

https://institucional.absidemedia.com/

In any case, it seems clear that the youngest generations' lack of habit will be difficult or impossible to reverse. This habit used to be constructed, until now, in the family's daily routines, through the adults' own prescription in the family setting.

The essentialness of brand is another point of agreement among the interview subjects, who remark on the importance of the strength of a brand, with recognisable attributes, to attract and subsequently retain audience. Once contact and consumption have occurred, the product offered must be sufficiently able to generate engagement to convert the users/listeners into members of a community. The problem is that for the members of the generation in question, there has been a loss of the brand attributes that would make radio content attractive to them.

Chan-Olmstead, **Wang** and **Hwang** (2022) express a similar view when they conclude how important it is for radio to build brand in the digital world and achieve engagement through new technologies (2022). Although their paper refers to the Millennial Generation, this affirmation is perfectly extendible to Generation Z given its characterisation as a cohort. Likewise, Arrese, Medina and Sánchez-Tabernero stress the importance, for companies, of audience engagement mechanisms and brand management as a guarantee of survival. The authors conclude by citing the following research topics to include in the future agenda of media economics:

> "The analysis of how to manage time as an economic resource in a context of exponential growth of contents and platforms for consumption. (...) The analysis of how media organizations will use qualitative and quantitative knowledge to integrate audiences into their production process through brand management strategies that create strengthened brand relationships. (...) From media management and media economics perspectives, more research is needed to understand the full ramifications of engagement for content production and commercialization." (**Arrese**; **Medina**; **Sánchez-Tabernero**, 2019, p. 72)

One reason behind the success of Australian youth radio formats is in effect community identification and belonging, which radio has helped build with its brands and spoken content (**Espinosa-Miravet**; **Ferrer-Roca**, 2021).

In spite of all networks sharing this reasoning, none of them seem capable of making a decisive move to put a halt to the alienation of this age segment. The process proves especially difficult in an environment where the proliferation of the digital offering –and, sometimes, the networks' own nonexclusive distribution– dilutes this identification. Doubts exist about the relationship which ought to be established between a radio company and platforms or aggregators, whether for broadcasting or consumption.

The debate is not limited to the Spanish context alone: it is an international issue and proposed in the same terms. Is it better for radio to create its own digital access? If aggregators favour a radio company's distribution but simultaneously dilute its brand, which is preferable, gaining distribution or reinforcing brand identity? Should free content be given to third parties? What happens to the user data which radio provides these third parties? The balance for operators is not clear (**Fernández-Quijada**, 2021), although it is for some authors like Chan-Olmstead, Wang and Hwang:

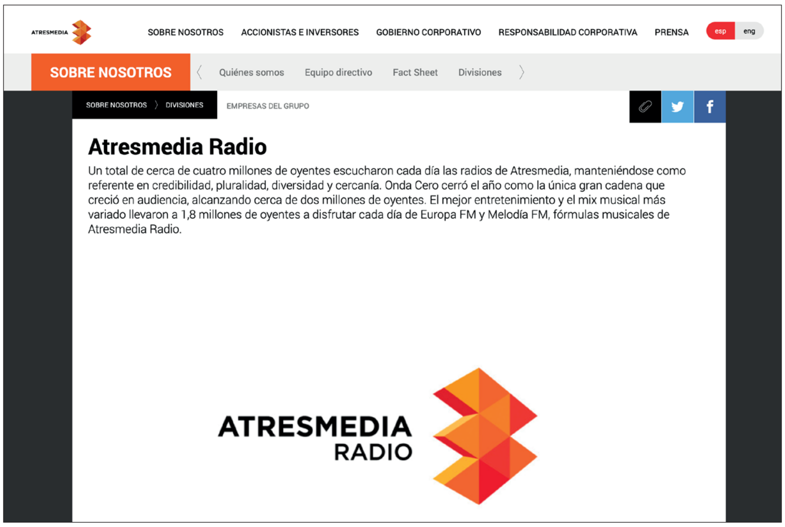
> "In essence, besides their particular relationship with radio stations, third-party content aggregators might dilute audience's connection to radio stations when the users become more loyal to the aggregators than the stations." (**Chan-Olmstead**; **Wang**; **Hwang**, 2022, p. 264)

In this context, the radio industry was accustomed to the commercial relationship with its broadcasting and signal transport provider consisting only in the fee paid out to this provider for the service. It was sometimes even the radio company itself which owned the entire value chain, including broadcasting, all the way to contact via MW or MF with its audience. This model is quite different from digital distribution, where the provider also hopes to generate added value for its own benefit through the distribution of the sound owned exclusively, until now, by the radio

> Generation Z mainly listens to music radio and sports (from generalist-based stations)

company, either through data mining or directly from the advertising revenue generated through the platform.

All interview subjects agreed that online listening is on the increase and represents the only way to reach this generation. The comparative study on radio consumption between Australian and Spanish youth demonstrates that for this generation, apps are the most commonly used vehicle for listening to the content produced by radio companies. In Spain, the most powerful recommendation is the one which arrives through social networks like Instagram or *YouTube* (**Espinosa-Miravet** and **Ferrer-Roca**, 2021).



https://www.atresmediacorporacion.com/sobre-nosotros/divisiones/uniprex_2010021658a2e46e0cf2f719cbf3b666.html

In digital sound consumption, the podcast is emerging as the possibility with the most widespread appeal and which provides the most significant distinguishing traits (ahead of streaming and apps). In spite of the current low volume –in absolute terms as previously observed–, the podcast is overwhelmingly perceived as an opportunity to persuade Generation Z to consume audio produced by radio companies. **Gabardo** (2022) sees it in relation to the consumption habits of other audiovisual products through mobile phones: what matters is not the live consumption of content, but rather the power to consume it when and where they feel like it, upon recommendation. In the same vein, Küng cites podcasts as an example of the rise in consumption of content produced by radio companies, in contrast to the drop in live consumption:

> "And while consumption has increased in some cases –on-demand catch-up TV services increase overall audience numbers, as do podcasts of radio shows– overall, first-showing mass-market audiences seldom have the dimension they had a decade ago." (**Küng**, 2017, p. 37)

It seems, then, that private radio companies have been late to realise that the maxim "analogue dollars/digital dimes", which might have made sense at the start of the 2000s, no longer reigns. This paradigm shift makes much more sense when we analyse the consumption profile of Generation Z and the paradox represented by the radio companies' abandonment of this generation in terms of tailored content. In "Why Radio Doesn't Care About Gen Z (But Why It Should)", Jacobs emphasises the error it represents for these companies not to pay attention to Generation Z like the advertising industry does:

> "The advertisers of the world are working hard not to miss the moment. Gen Z is a prime topic of conversation each and every day as marketers vie to understand this influential cohort of consumers." (**Jacobs**, 2022)

In the absence of sufficient experience accumulated on this cohort, a consensus emerges among the interview subjects on the gratuity of the sound content to offer, in combination with payment for the digital consumption of new products, not broadcast over the air and with enough attributes of quality and community. For this case, some amount of time will have to pass because the habit of paying to hear radio content –unlike the content of digital platforms– does not yet exist.

Finally, there also appears the formula of a commercial relationship from origin for the development of new custom-built online products, creating brands and products for other ages alongside exclusive commercial sponsorships, if this offering is not taken on by the public service as part of its social purpose.

Content, and its management, deserves a special mention. For **Cuní** (2021), content proposals come from professionals close in age to the audience pursued. It may seem obvious, but it does not always happen like this and this is why he identifies it as one of the reasons behind his brands' success and the permanent differentiation of their sound. **Espinosa-Mirabet** and **Ferrer-Roca** (2021) refer to it in a similar way, including a creative sound environment, far from the conventions of standard radio, as one of the factors which attract young Australians. In the battle between content (plentiful) and convenience (rare), it is important to offer meaningful proposals to attract listeners to radio content, according to **Fernández-Quijada** (2021). The author adds that what transmits authenticity works.

There is a common opinion that music, while never going away, is not the content which will serve to attract young people to the radio companies' sound offering. In terms of spoken content, there is agreement with the conclusions of studies in similar markets where this contact already exists: young people prefer topics spoken through experimental formats or lenses (*EBU*, 2021 for markets in our European setting and **Espinosa-Mirabet** and **Ferrer-Roca**, 2021 for the Australian market).

> There is agreement that the lack of listening habits of the youngest generations will be difficult to reverse

The anthropological research successfully conducted by *Flaix*'s musical stations for the selection of themes would be applicable to the discovery of interests for spoken content: listening to what the audience wants to hear, seeking it out where it is. We can in fact affirm, in light of the previous conclusions, and in agreement with the interpretations of the interview subjects, that Gen Z's contact with generalist radio to consume news ought to be considered involuntary or social listening (due to the timetables and place of listening, the car). In contrast, sports and specifically weekend sports broadcasts are Gen Z's moment of maximum connection with generalist radio. This is due, according to the interview subjects, to the fact that identification with a team fulfils the conditions of emotional engagement and community building which must form part of the foundation of any long-lasting relationship between the medium and its audience.


Inicio › Sin categoría › PRISA Radio se alía con GeoQ para conocer mejor su audiencia

PRISA Radio se alía con GeoQ para conocer mejor su audiencia

Por La Redacción - 17 octubre, 2018

https://lapublicidad.net/prisa-radio-se-alia-con-geoq-para-conocer-mejor-su-audiencia/

Apart from broadcasts, the interview subjects expressly cite the programme *El partidazo de COPE* as an example of the effort made by the medium to attract younger audiences and experiment with formal renovation and digital dissemination, a programming window progressively abandoned by the youth audience that follows football. For **Vides** (2021), the data on consumption by this cohort and the audience peak which used to occur after 11:30 pm, for example in the year 2006, is explained by the independent sports programmes broadcast on generalist radio at that hour. Thus, sports attracted this age range as it consisted in content offered live and exclusively over the radio. In 2021, sports content has spread to the digital realm in linear consumption and to all forms of audiovisual content as downloads, which explains why for this generation of digital natives, in their opinion, radio has lost importance as a provider even of content which does interest them, and the networks themselves are trying to broaden their sports offering via social media (*YouTube*, *Twitch*, etc.).

Radio consumption can be habit forming and given that it represents a cultural experience good, contact with the medium is indispensable. However, without specific content this is not possible. It has been demonstrated that the offering of child and youth content and media education are among the reasons for a high level of radio consumption in Generation Z, as illustrated by **Espinosa-Mirabet** and **Ferrer-Roca** (2021) for the case of Australia. In contrast, in the opinion of the interview subjects, radio for a child or preadolescent audience in Spain does not seem to get very far if it is not either at the initiative of public media or thanks to the funding at source from commercial brands (such as *Vodafone*'s exclusive sponsorship of one *Media Capital* station in Portugal). The subjects agree, once again, that these formats will have to be digital.

> The free-based business model will have to be replaced by the subscription model for the platforms because there is not enough business in the advertising of the content aggregators alone

Grupo Prisa is launching some initiatives in this area, such as *Dial Mini* or the family content of *Los 40 Classic* (for parents with their children) but treating it as form of experimentation, not yet understood as a firm business model.

Among the cited threats lies the exploration of attractive content for these generations spearheaded by voice assistants: *Alexa* in the United Kingdom (*Echo Dot Kids)* is experimenting with content for children to make them acquire the habit of asking for and listening to audio entertainment (**Pedrero-Esteban**, 2021).

Finally, uncertainty about the result of applying resources to experimentation to attract these audience segments causes private radio companies, despite the shared diagnosis, to refrain from investing or to do so timidly. In contrast, large sound distribution companies like *Spotify* base their business precisely on enormous investments at a loss in the launch phases, a strategy radio companies cannot afford.

7. Conclusions

The purpose of this article is to describe the radio consumption among Generation Z, report the diagnosis made of this consumption by the content managers of the main commercial private radio corporations in Spain and suggest proposals to make this generation tune in, if no longer to the radio, at least to the sound products of radio companies.

The data provided illustrates the distancing of Generation Z from the radio medium, with lower consumption in the 14-19 age cohort, a fact which bodes poorly unless measures to reverse it are taken. This loss of contact occurs with both music-themed and generalist radio. In the first case, the generation's listening behaviours coincide with its daily routines, in which even the abandonment of nighttime consumption can be noted. As for generalist radio, sports broadcasts amount to the highest number of listeners from Generation Z. A portion of this listening is loaned, social, but voluntary listening points to one of the methods for attracting this audience: identification with a community.

https://www.flaix.com

The application of the theoretical framework along with the interviews makes it possible to identify the possible causes of this loss of contact. The objective fact of the change in the populational pyramid, which thins among the younger age cohorts, is no excuse for the nonexistence of offers created by radio companies to reach children and preteens. For these ages, furthermore, the growing consumption of multimedia content, easily and quickly via mobile phone starting at ever younger ages, has empowered them as no previous generation has been empowered before, which –added to the multiplication of digital offers– has distanced them from the consumption of the medium.

The traditional prescription of the family setting towards radio consumption has been altered completely, and this chain of habit transmission will have to find other formulas for achieving contact with the medium, or at least with sound products produced by radio companies.

The situation is worsened by the nonexistence of radio products tailored to child (or family) and preteen audiences (as does, on the contrary, occur in countries with very high radio consumption by this generation). Top it off with a context of recurring economic crises, where managers' aversion to risk prevents them from exploring adjacent opportunities based on this target. We find ourselves, therefore, before what **Llano** (2021) has called the "perfect storm" for the disengagement of this generation.

Given that there is agreement on the irreversibility of all these conditioning factors, and aligned with the desire manifested from the start to transfer knowledge to the sector, the next step was to attempt to determine where these companies should head in the future.

What factors could be relevant to attract this generation to the content produced by radio companies? The quantitative and qualitative data presented throughout this paper make it possible to pinpoint some of these factors, such as the need to introduce a line of exclusively digital production, in which paid and free content are combined, into radio's value chain. This digital production is inherently linked to maximising the brand and creating a community around it. The traditional radio company must create its own environments to give it more control over its content, its audience and, obviously, the associated data. This does not mean it can't take advantage of other platforms, provided these platforms serve to support the company's promotion. Another highly relevant factor is the need for well-designed content produced by Gen Z for Gen Z, allowing this cohort to create its own references. Finally, media literacy is essential as a crosscutting public-private factor that ought to originate in family listening, requiring the production of sound content tailored to this type of group consumption.

Media literacy has always been a goal for the academic and teaching community, but it also must adapt to the new times, in which this media literacy refers more (although not exclusively) to new media, social networks and the digital and virtual realm than to the linearity which defined the mono-media environment. The fact is recognised by authors such as Pérez-Escoda, Pedrero-Esteban, Rubio-Romero and Jiménez-Narros, who point precisely to the need to rethink media literacy from a holistic and crosscutting point of view:

> "Rethinking media literacy should be thought of as a global solution that involves governments, media stakeholders, and education leaders at schools and universities." (**Pérez-Escoda**; **Pedrero-Esteban**; **Rubio-Romero**; **Jiménez-Narros**, 2021, p. 136)

As Pluskota affirms, radio should consider the profile and needs of new generations

> "to be part of a broader Media Listening Experience (MLE) comprised of streaming, podcast, and satellite listening options." (**Pluskota**, 2015, p. 325)

The key, according to the author, resides in radio redefining itself not only as a medium but also as a technology. As already mentioned in the theoretical framework section, radio is an "experience good" and media literacy is an excellent opportunity to gain contact with the medium.

Finally, another generally expressed conviction is that there is still time to make the contact between the youngest consumers and the sound products of radio companies viable; it is a need which must be confronted by the sector as a whole, and doing so through digital channels or platforms is a required condition but is not enough, if the content is not produced with this cohort expressly in mind.

Importantly, this paper does not offer a qualitative study of user motivation. The decision to focus on the content perspective and on the detailed analysis of audience data was made in the paper's design phase. The relationship between radio and Generation Z, from the audience perspective, could be the subject of future analyses.

This paper opens the door to two other new fronts. Firstly, the data provided by *AIMC* could be exploited more deeply for an academic approach to the sector's challenges, from the *EGM* itself analysed through this lens to the analysis of the data provided by the *AIMC* report *Marcas*, which is based on 10,000 interviews and compares the population's exposure to media forms with its lifestyles and attitudes toward consumption, the media forms themselves and society.

Secondly, the theoretical framework of media economics and media management, in addition to the postulates of foresight, could be applied to the private radio broadcasting sector in Spain and used to gain more insight in the direction the conclusions of the present paper point toward.

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