



# GfK Australian Share of Audio<sup>®</sup> 2022



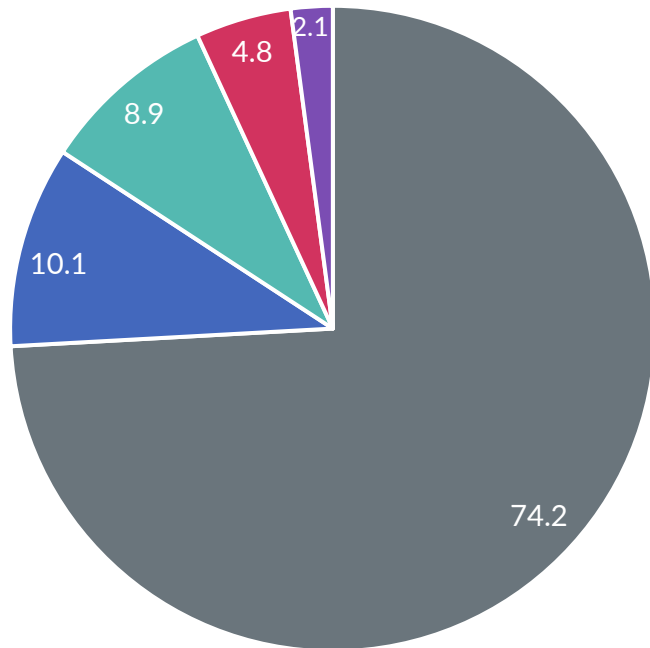
# Share of Audio Pie Charts

Total Market & Commercial

Commercial Radio dominates commercial listening with over 74% of the consumption 10+. Commercial radio dominates the key buying demographic of ppl 25-54 with over 64% for 25-54. Podcasting is growing but is already the 2<sup>nd</sup> largest commercial listening segment in both

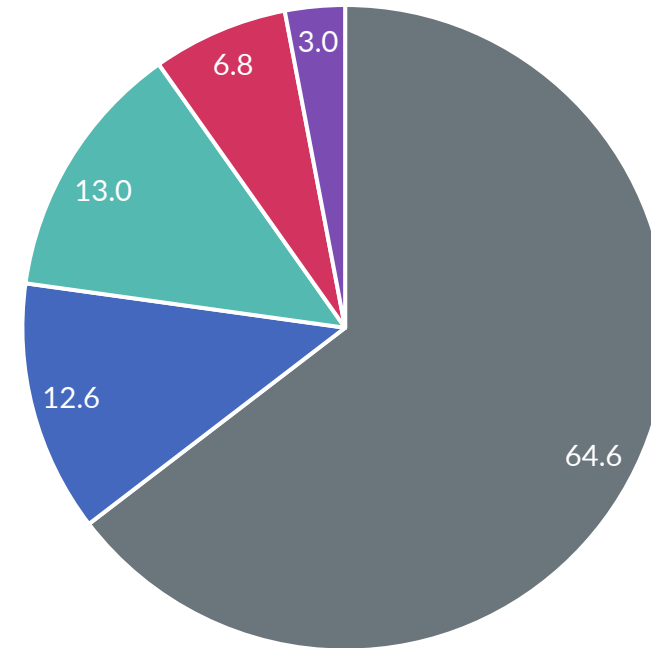
People 10+

Commercial Only\*



People 25-54

Commercial Only\*



- Commercial radio
- Free Music streaming
- Free Podcasts
- Online music videos
- TV music channels

- Commercial radio
- Free Music streaming
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- Online music videos
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GfK Australian Share of Audio 2022, Metro, P10+, share of listening (%), Mon-Sun 12mn-12mn

# Linear and Streaming Shares have been calculated by adjusting live AU radio to reflect the proportion of listening done via internet capable devices vs AM/FM and DAB+ Radios in the currency data (S6 2022)

\*Commercial radio has been calculated by adjusting live AU radio take into account the proportion of listening done to ABC stations in the currency data (S6 2022).

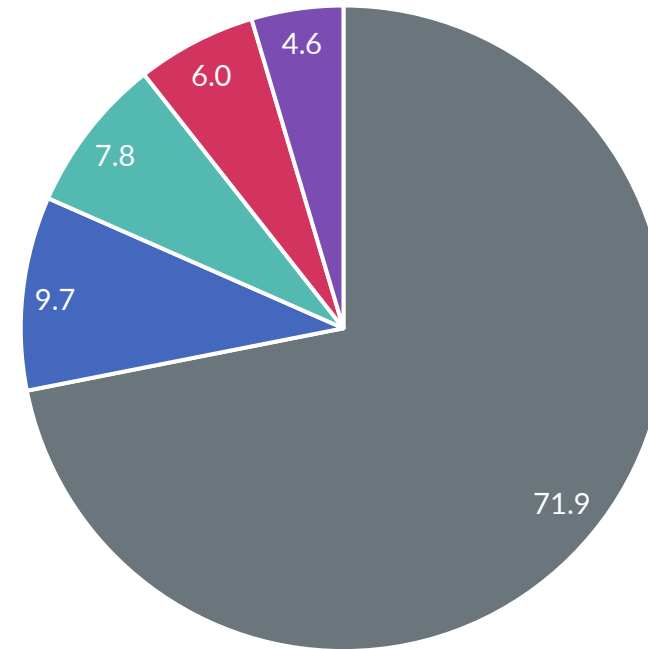
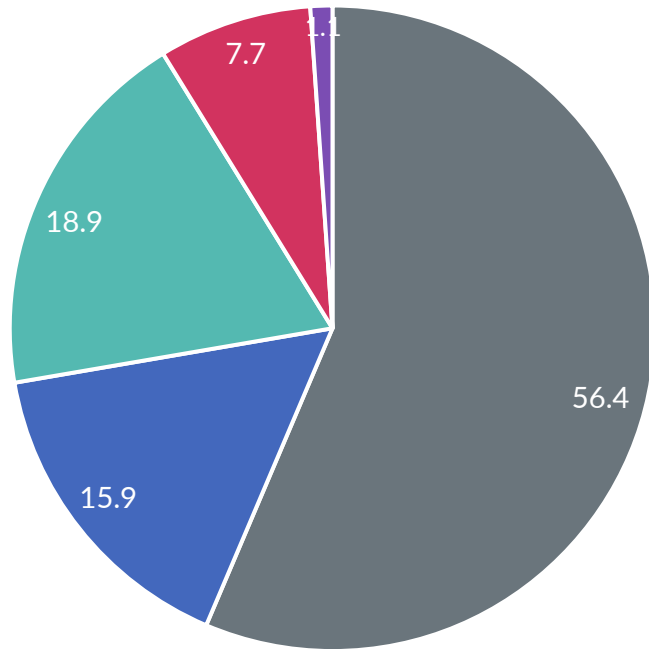
*In all key demographics, Commercial radio has a dominant lead in share of listening. In the younger demographics, free podcasting continues to grow and accounts for the 2<sup>nd</sup> largest listening segment.*

People 25-39

People 40-54

Commercial Only\*

Commercial Only\*



- Commercial radio
- Free Music streaming
- Free Podcasts
- Online music videos
- TV music channels

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GfK Australian Share of Audio 2022, Metro, share of listening (%), Mon-Sun 12mn-12mn

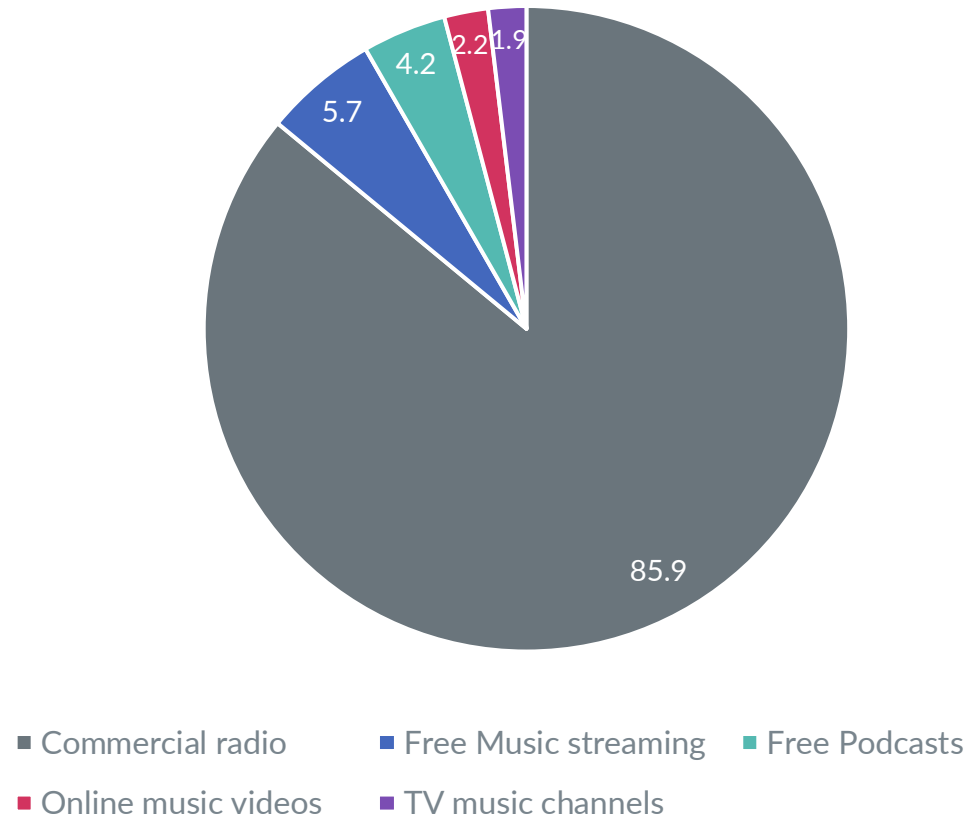
\*Commercial radio has been calculated by adjusting live AU radio take into account the proportion of listening done to ABC stations.

Commercial radio remains a very dominant factor in older demographics who still maintain more traditional listening behaviors and with no other commercial audio holding any great share of listening.



People 55-64

Commercial Only\*



# Share of Audio

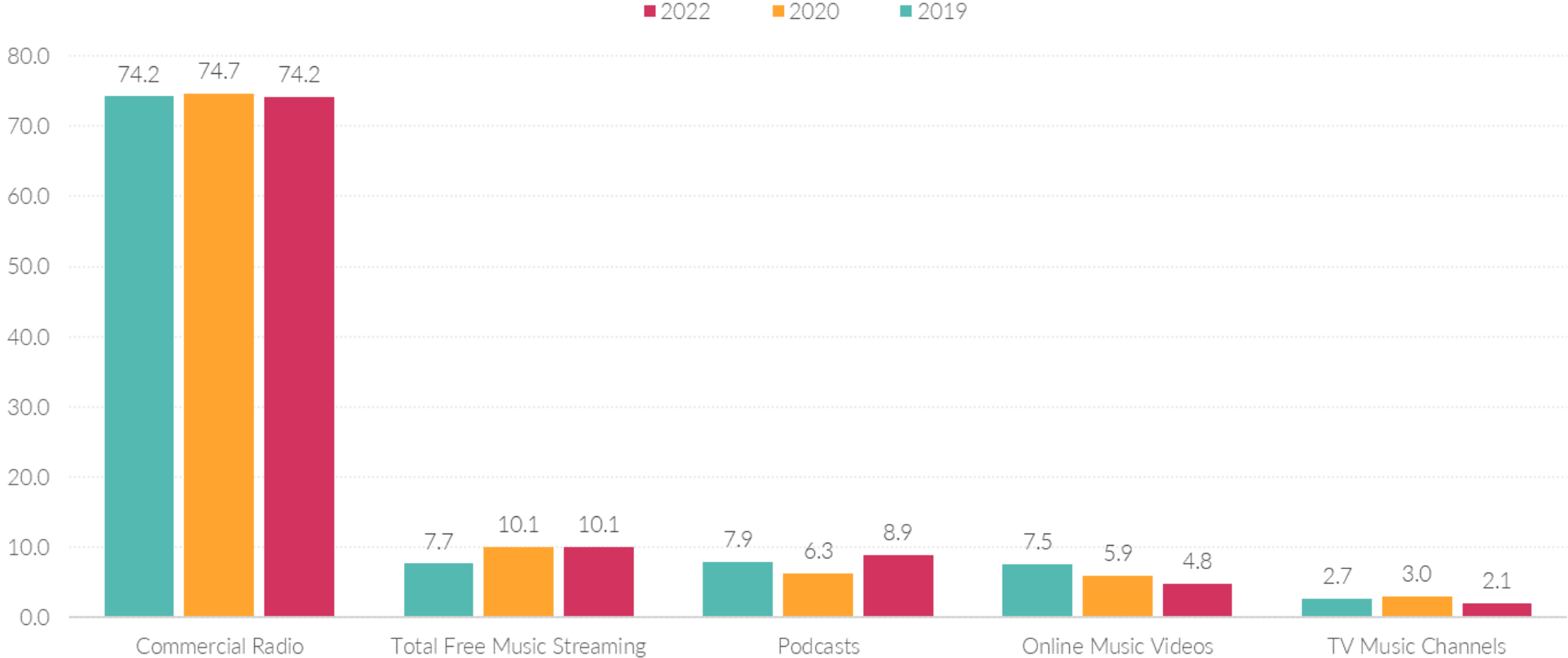
## HISTORICAL TRENDS

Commercial radio remains steady and consistent, even through the Covid challenges, with over 74% of all listening 10+. Free Music Streaming has flattened and online Music Videos is declining.



### Metro Only, P10+

SHARE OF AUDIO - Commercial Radio (All Ppl 10+)

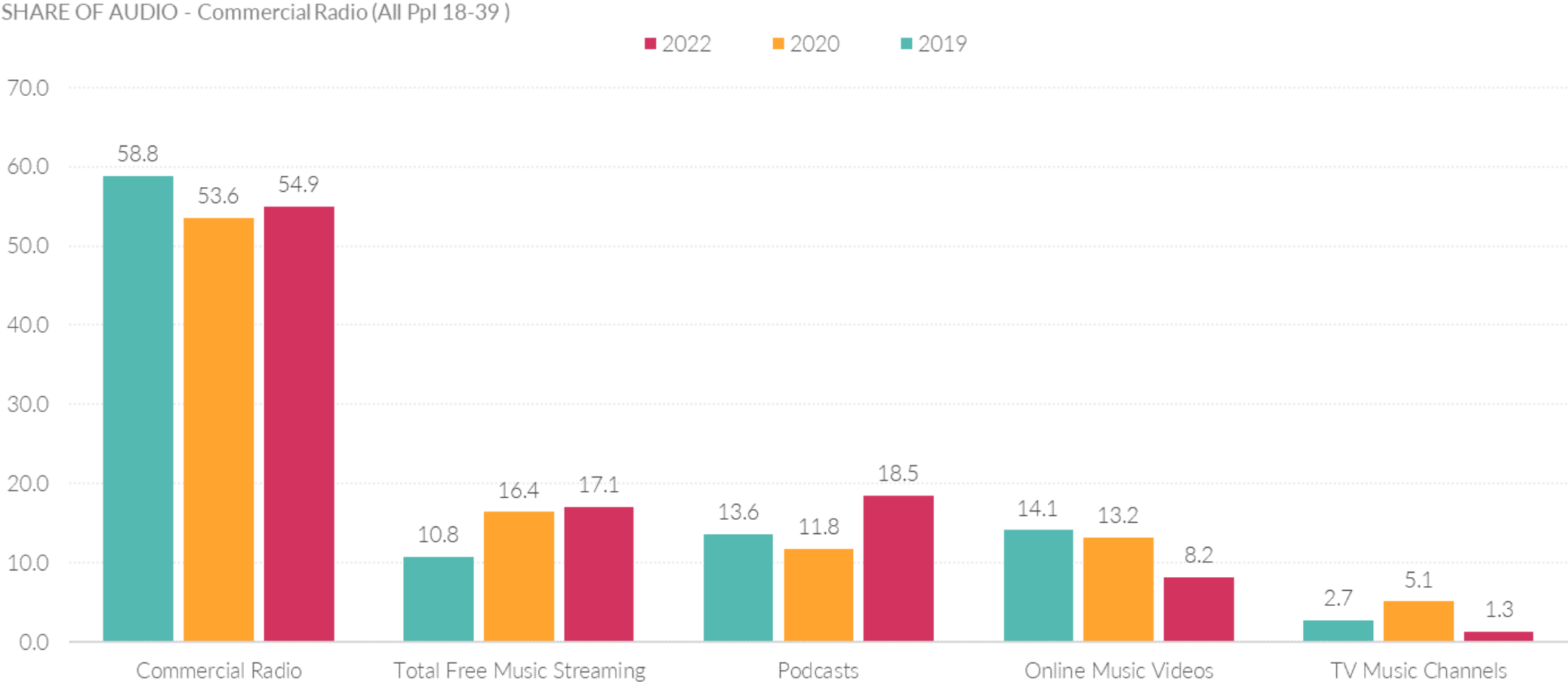


GfK Australian Share of Audio 2022, P10+, Share of commercial listening (%), Metro, Mon-Sun 12mn-12mn. \*Commercial radio has been calculated by adjusting live AU radio take into account the proportion of listening done to ABC stations.

*In the younger demographics, commercial radio still holds over half of all listening with over 3 times more than Free music streaming. Podcasting accounts for the 2<sup>nd</sup> largest segment of commercial audio listening in the 18-39's and is sitting above Free Music Streaming*



Metro Only, P18-39



GfK Australian Share of Audio 2022, P18-39, Share of commercial listening (%), Metro, Mon-Sun 12mn-12mn. \*Commercial radio has been calculated by adjusting live AU radio take into account the proportion of listening done to ABC stations.

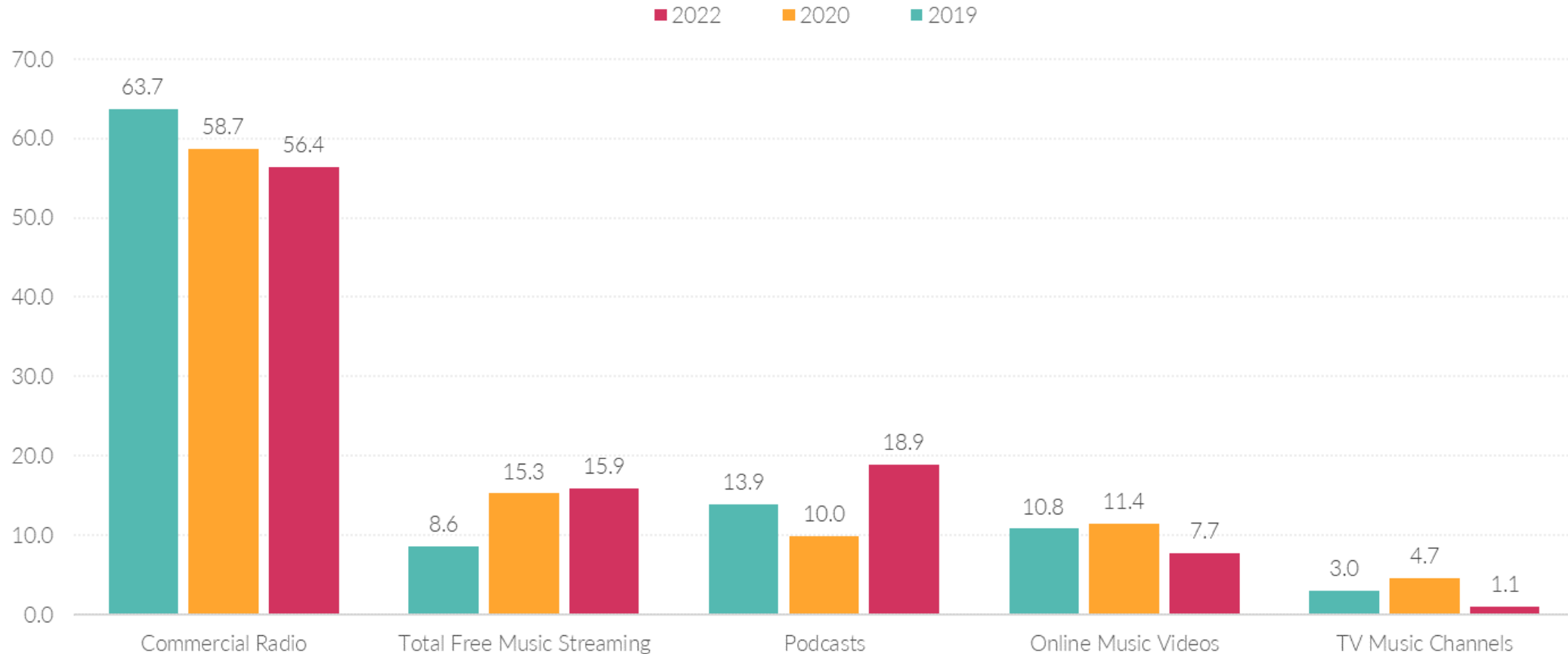


*In the key 25-39 demographic commercial radio holds over 56% of all listening, over 3 times more listening than Free Music Streaming. Podcasting is the 2<sup>nd</sup> strongest segment growing rapidly with listening almost doubling in 2022*



## Metro Only, P25-39

SHARE OF AUDIO - Commercial Radio (All Ppl 25-39)



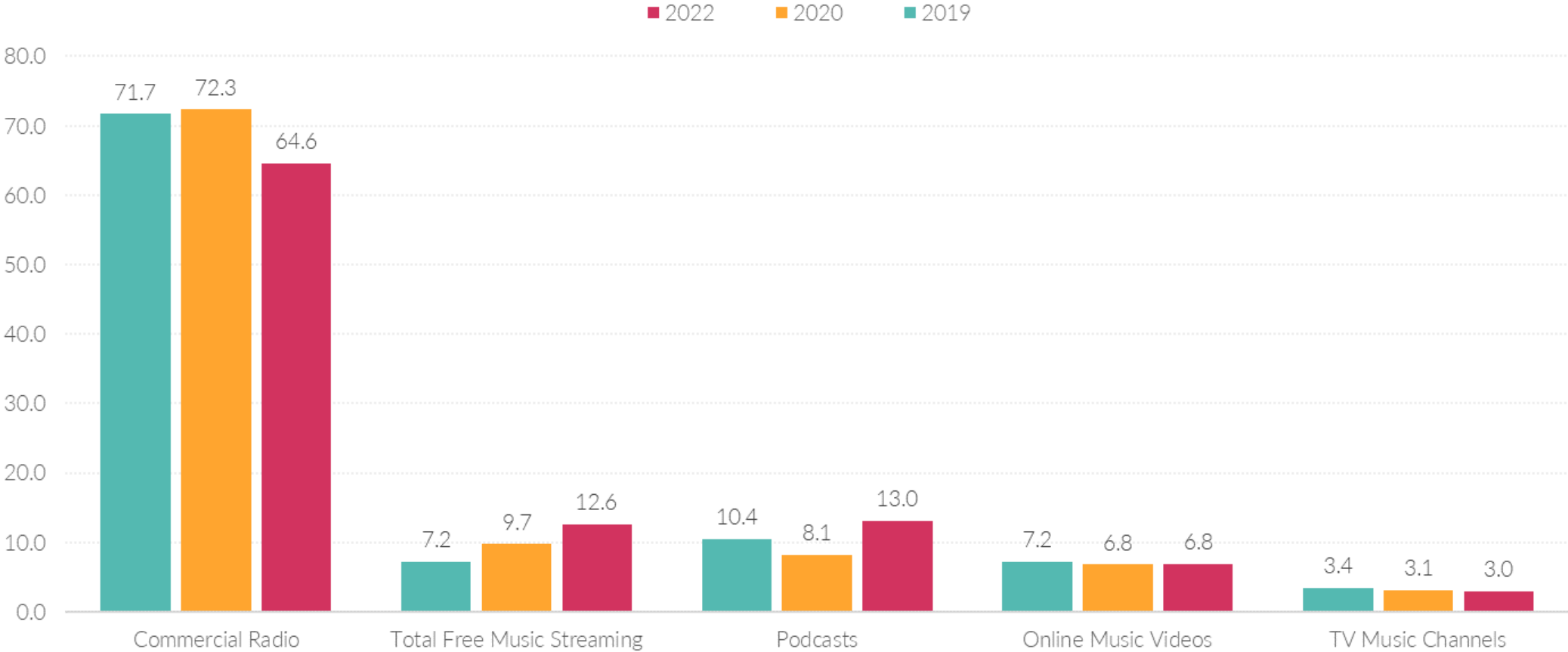
GfK Australian Share of Audio 2022, P25-39, Share of commercial listening (%), Metro, Mon-Sun 12mn-12mn. \*Commercial radio has been calculated by adjusting live AU radio take into account the proportion of listening done to ABC stations.

*In the key 25-54 demographic, Commercial Radio has over 64% of all listening, more than 5 times more than Free Music Streaming. Podcasting is the 2<sup>nd</sup> largest listening segment and has seen strong growth in 2022*



### Metro Only, P25-54

SHARE OF AUDIO - Commercial Radio (All Ppl 25-54)



GfK Australian Share of Audio 2022, P25-54, Share of commercial listening (%), Metro, Mon-Sun 12mn-12mn. \*Commercial radio has been calculated by adjusting live AU radio take into account the proportion of listening done to ABC stations.

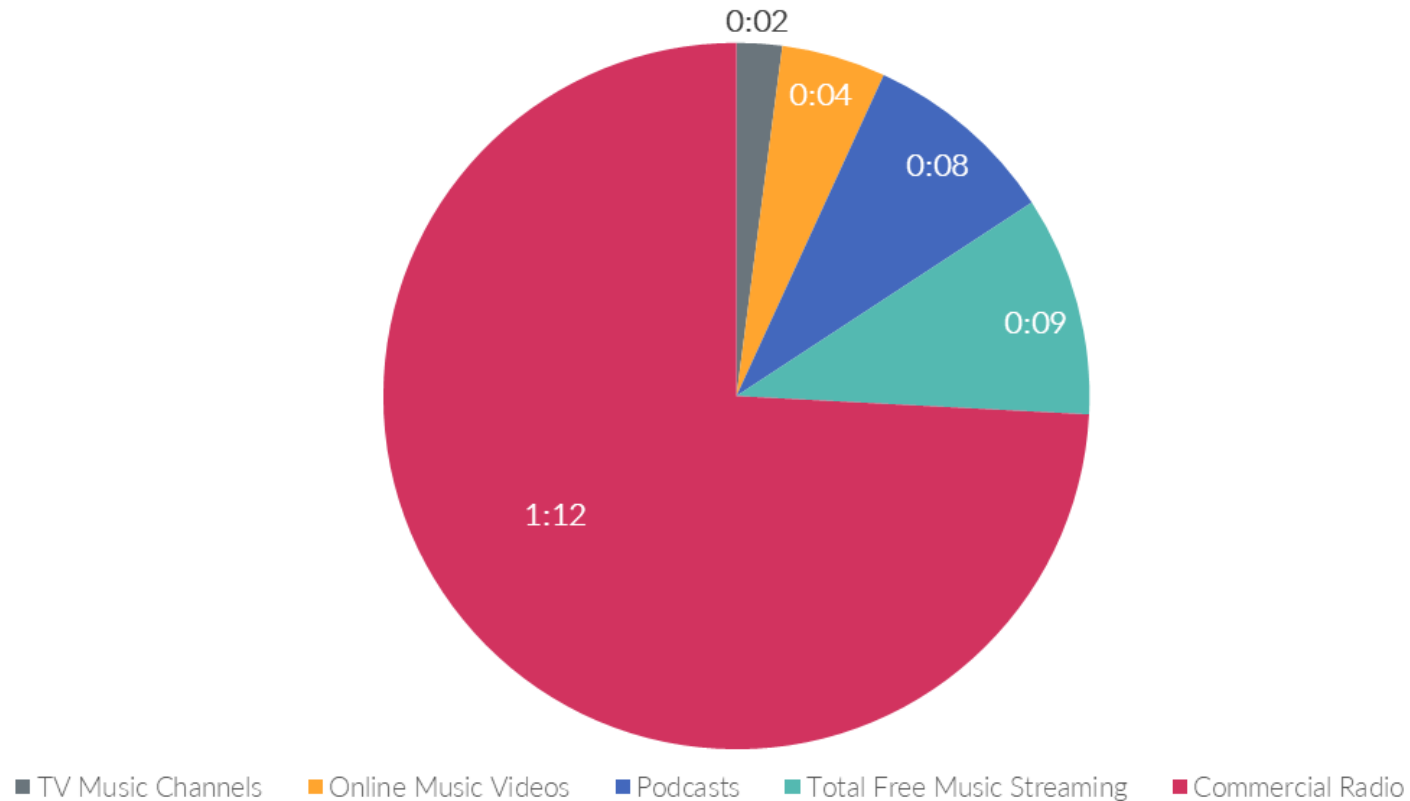
# Daily TSL TRENDS

*Commercial Radio Daily Time Spent Listening dominates 10+ audio listening with 1 hour and 12 minutes each day, well ahead of free music streaming which has just 9 minutes per day.*



Metro only, P10+

DAILY TIME SPENT LISTENING - Commercial Radio (All Ppl 10+)



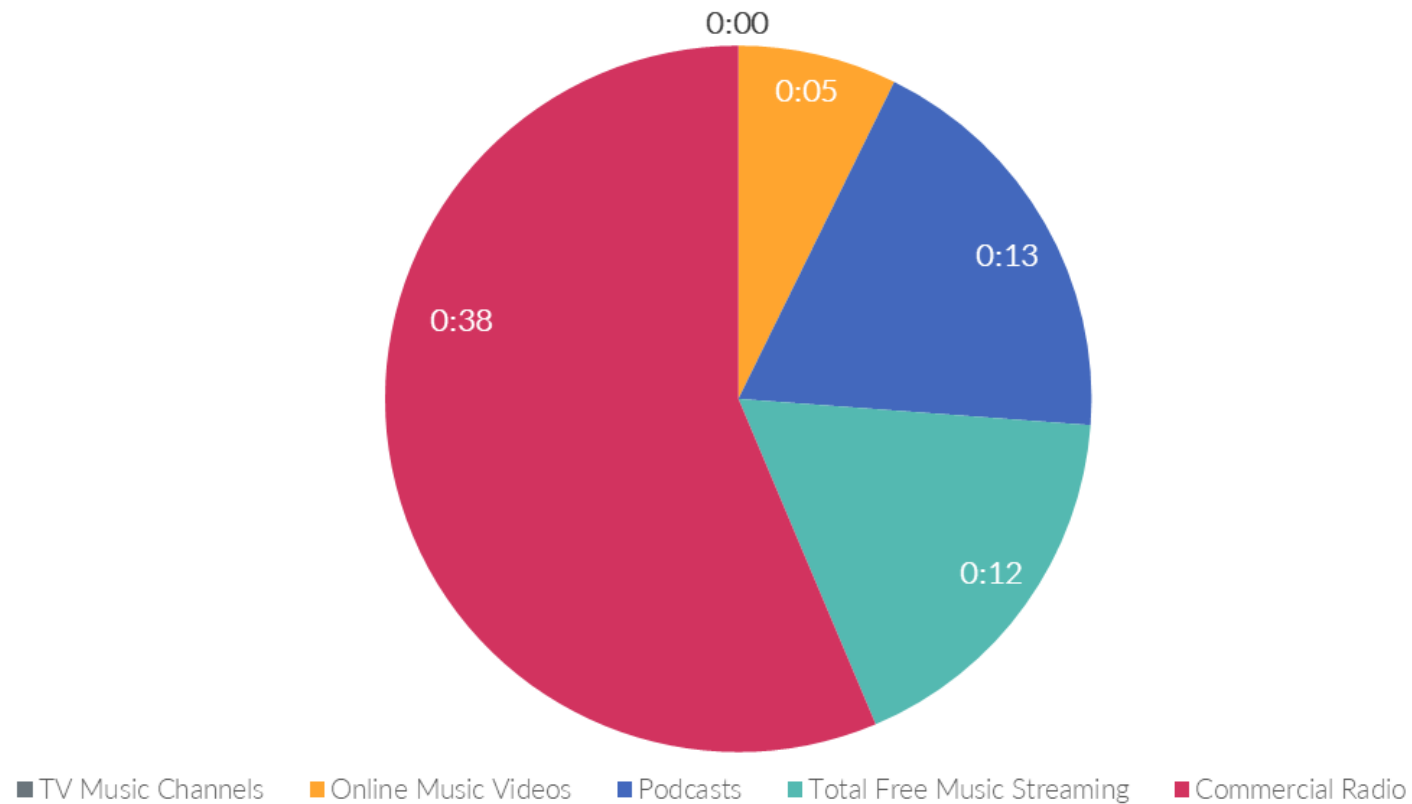
GfK Australian Share of Audio 2022, P10+, Share of commercial listening (%), Metro, Mon-Sun 12mn-12mn. \*Commercial radio has been calculated by adjusting live AU radio take into account the proportion of listening done to ABC stations.

*Commercial Radio Daily Time Spent Listening is still dominant in the younger 18-39 demographic with 38 mins per day over 3 times more than free music streaming on 12 mins per day.*



Metro only, P18-39

DAILY TIME SPENT LISTENING - Commercial Radio (All Ppl 18-39)

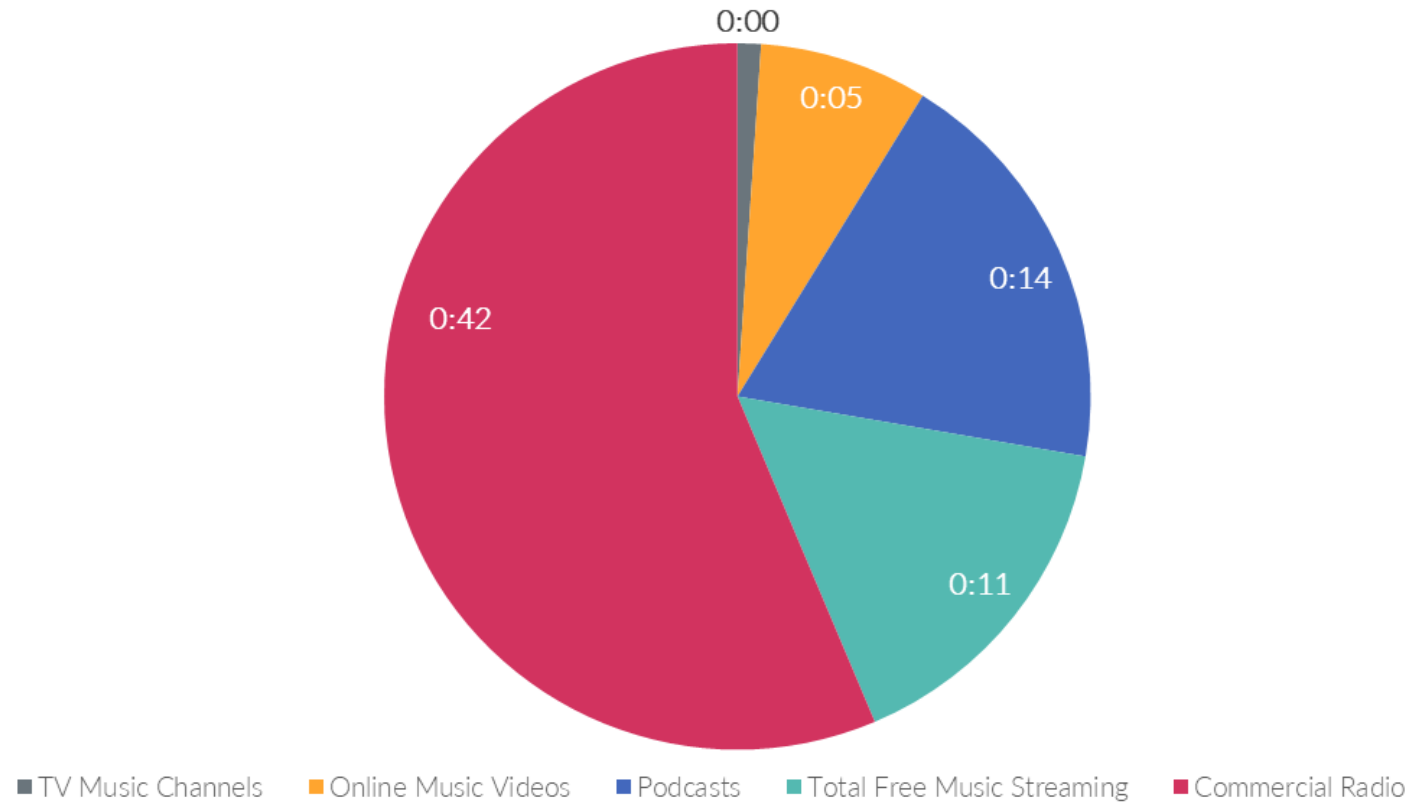


*In the key 25-39 demographic Commercial Radio has 42 mins of listening Daily, nearly 4 times more than free music streaming on 11 mins. Podcasting with 14 mins is the 2<sup>nd</sup> most listened to segment.*



## Metro only, P25-39

DAILY TIME SPENT LISTENING - Commercial Radio (All Ppl 25-39)



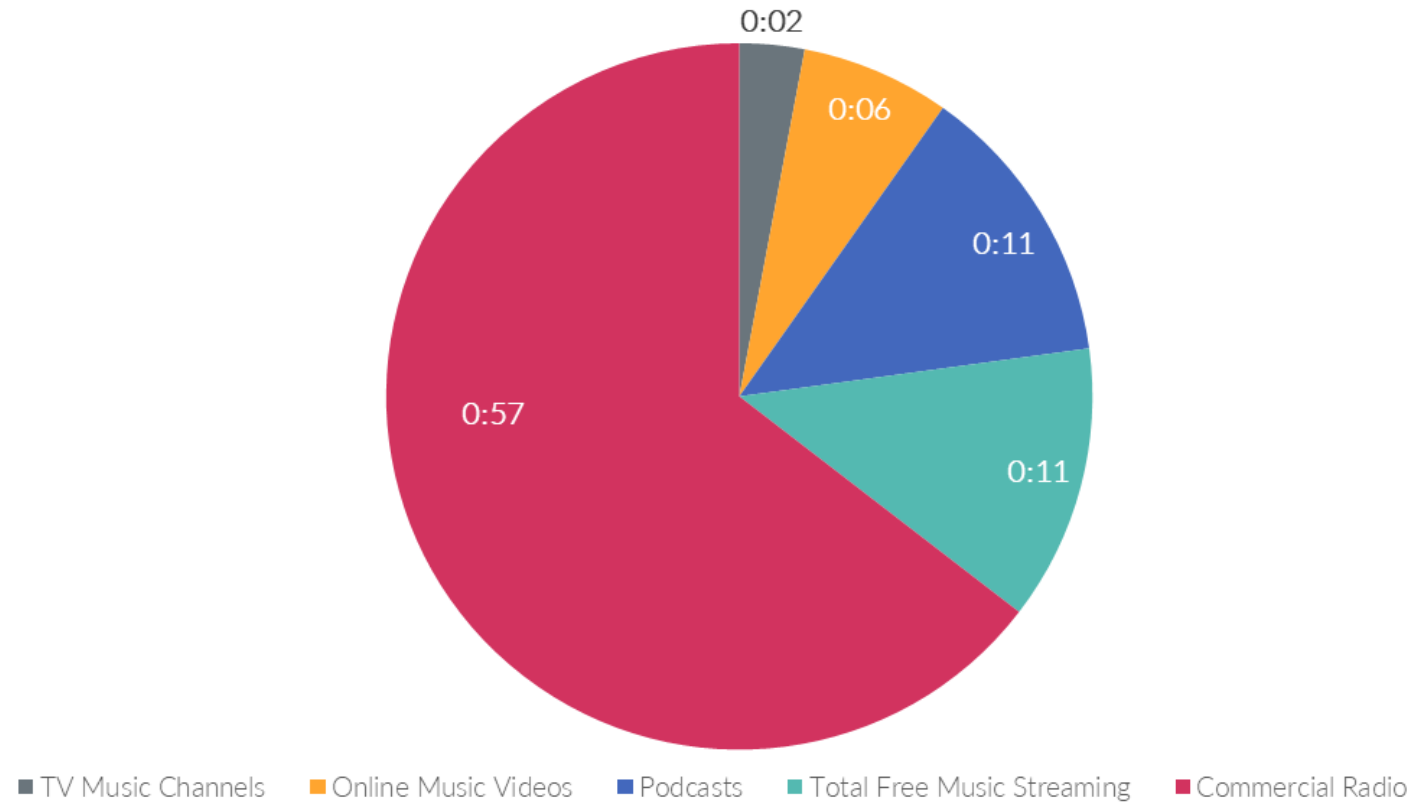
GfK Australian Share of Audio 2022, P25-39, Share of commercial listening (%), Metro, Mon-Sun 12mn-12mn. \*Commercial radio has been calculated by adjusting live AU radio take into account the proportion of listening done to ABC stations.

*In the key 25-54 demographic, Commercial Radio has a strong lead in Daily Time Spent listening with 57 mins over 5 times more than free music streaming.*



## Metro only, P25-54

DAILY TIME SPENT LISTENING - Commercial Radio (All Ppl 25-54)



GfK Australian Share of Audio 2022, P25-54, Share of commercial listening (%), Metro, Mon-Sun 12mn-12mn. \*Commercial radio has been calculated by adjusting live AU radio take into account the proportion of listening done to ABC stations.

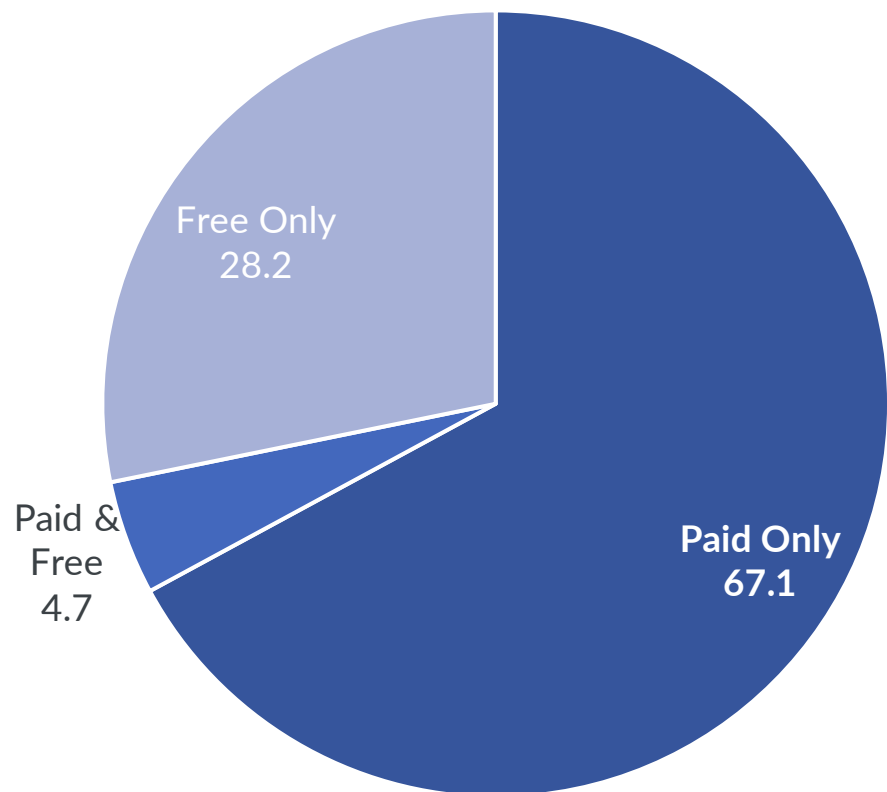
# MUSIC STREAMING



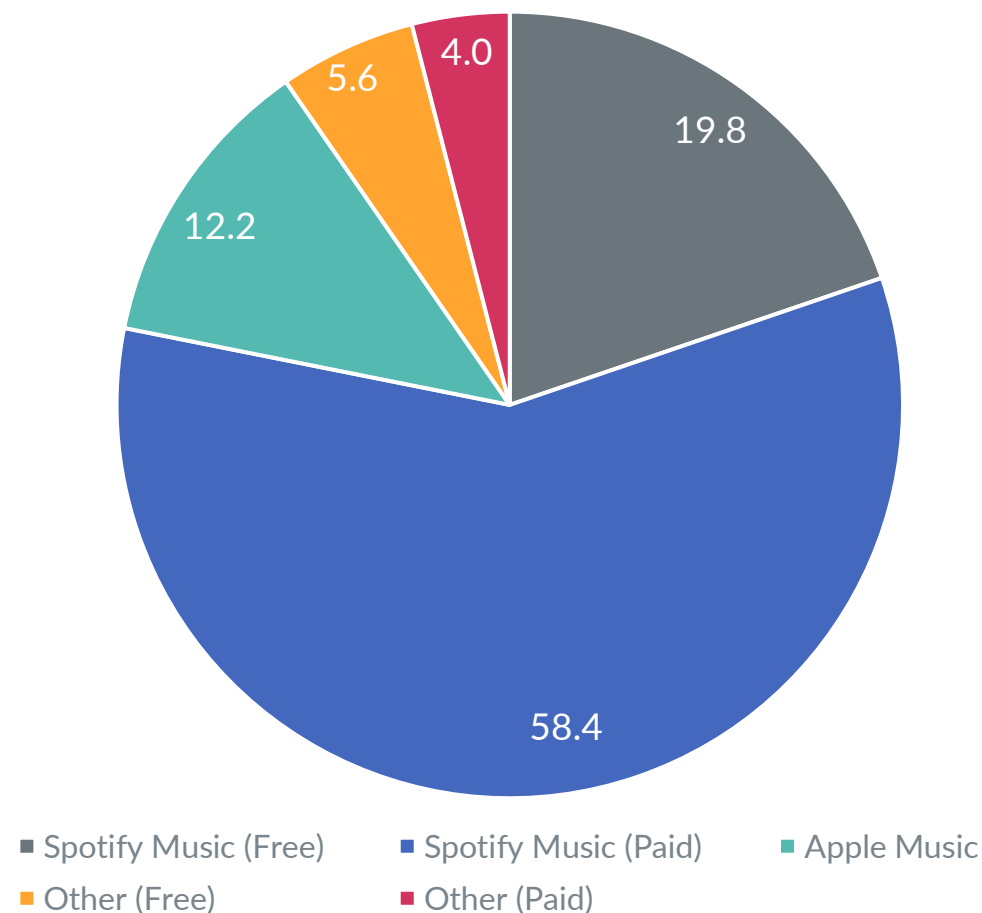
Music Streaming for People 10+ is dominated by paid subscribers. Only around one third music streamers listen to the commercially available free music option.



Share of music streaming listeners %



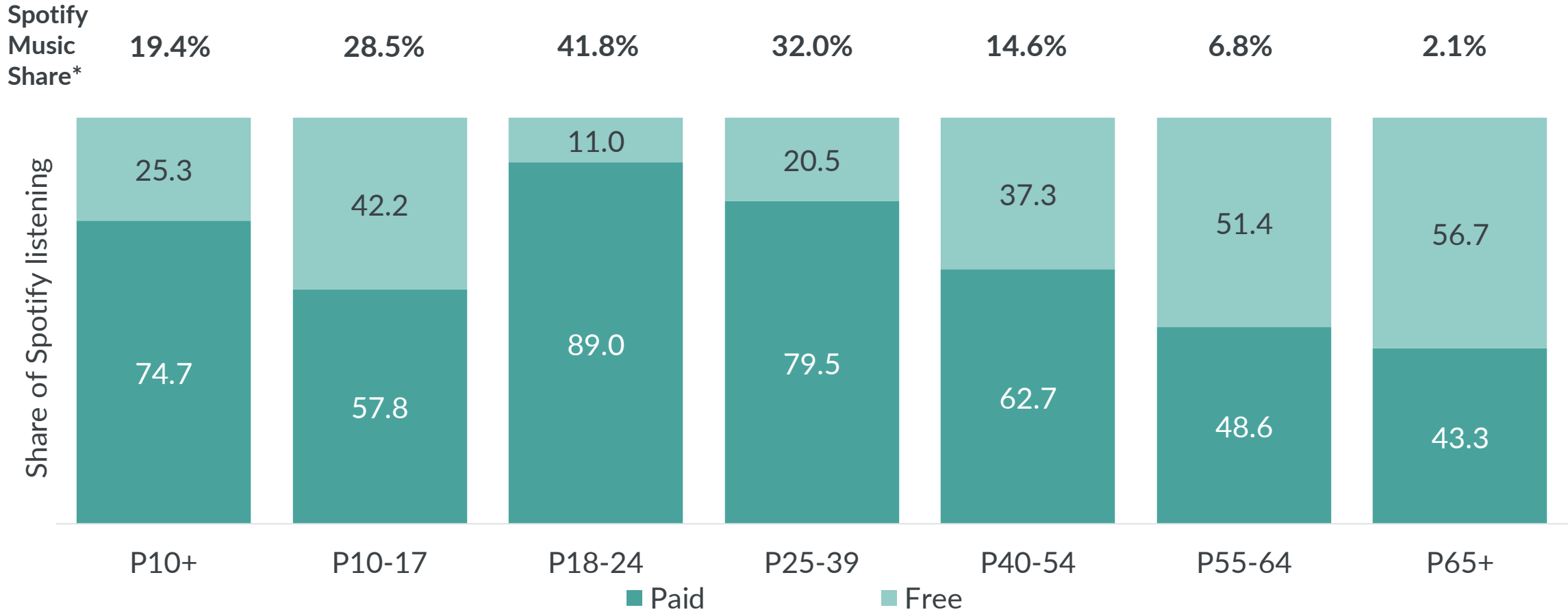
Share of music streaming listening %



Spotify music streaming is strongest for demographics Under 40 and the majority of these listeners are paid subscribers and not commercially available listeners.



Paid vs. free by age



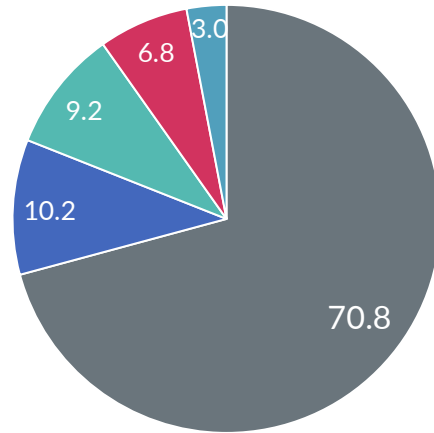
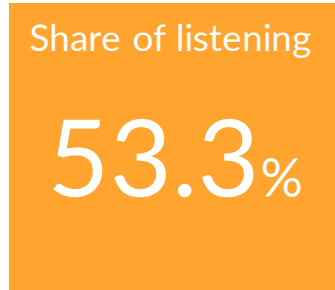
# PLACE OF LISTENING

Commercial Radio is the dominant form of listening to audio for People 10+ across the day and in the key places of listening. At Home listening accounts for over 53% of all audio listening, and Commercial radio has over 70% of that listening.

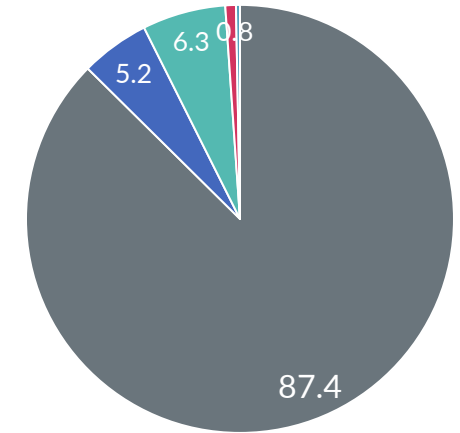
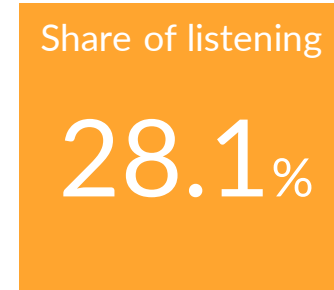
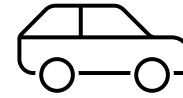


P10+

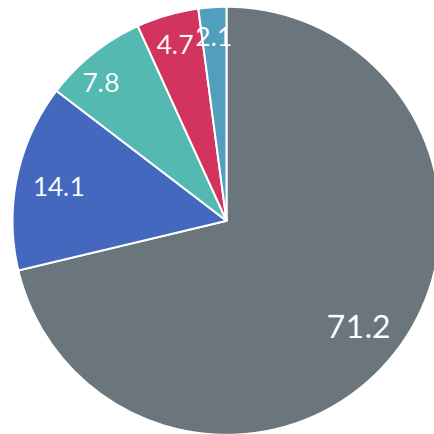
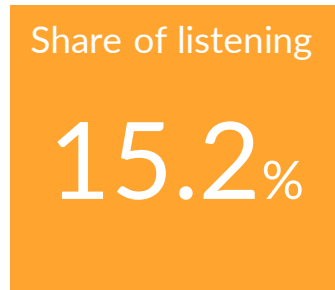
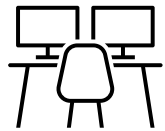
## Home



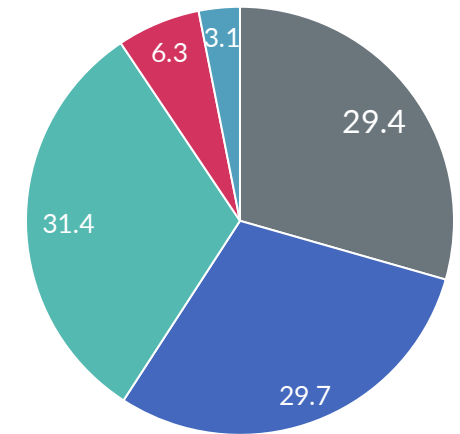
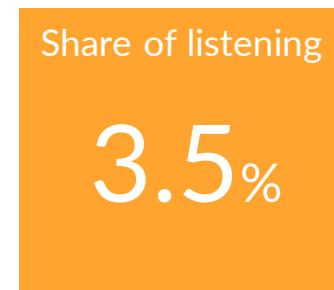
## Car



## Work



## Elsewhere



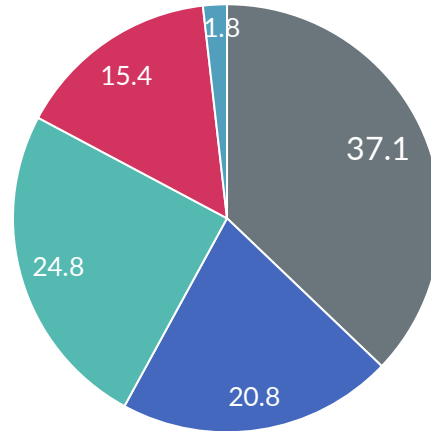
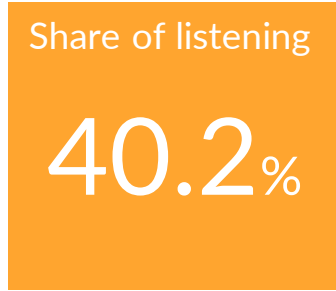
GfK Australian Share of Audio 2022, P10+, Share of commercial listening (%), Metro, Mon-Sun 12mn-12mn. \*Commercial radio has been calculated by adjusting live AU radio take into account the proportion of listening done to ABC stations.

For the younger 18-39 demographic At Home is still accounts for the largest share of audio listening across the day with Commercial radio the most listened to commercial medium. In Car listening is dominated by Commercial radio with over 90% of commercial listening.

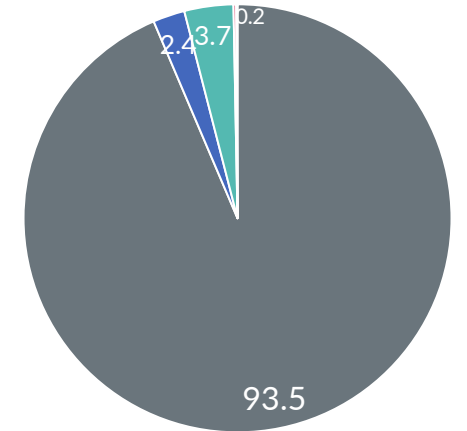
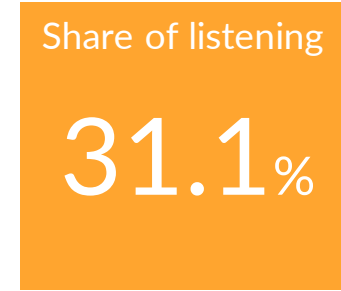
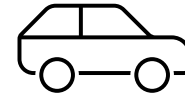


P18-39

## Home

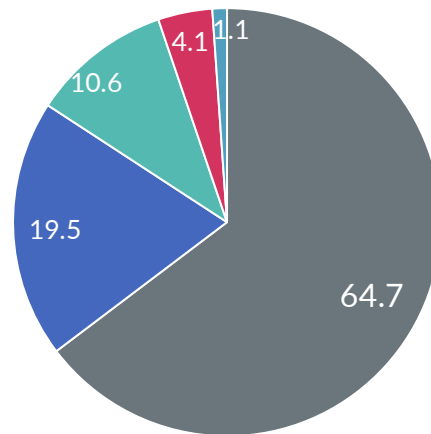
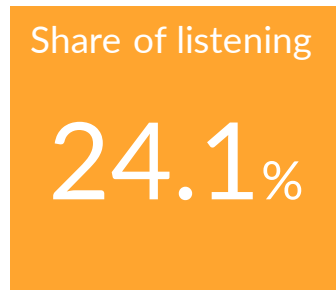
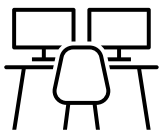


## Car

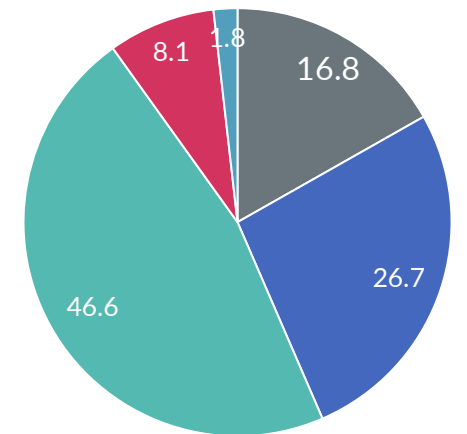
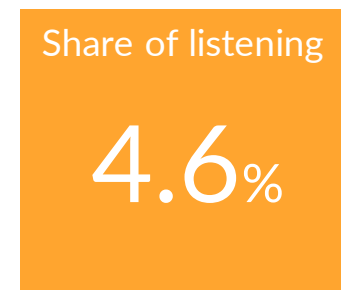


■ Commercial radio\* ■ Free music streaming ■ Free Podcasts ■ Online music videos ■ TV music channels

## Work



## Elsewhere

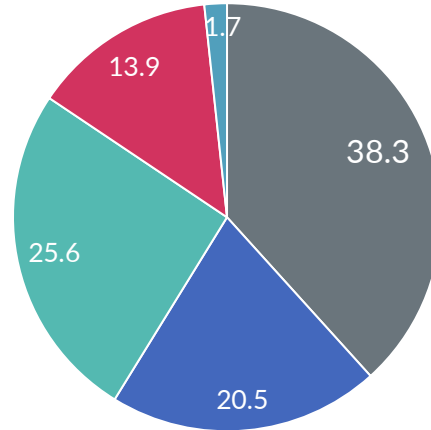
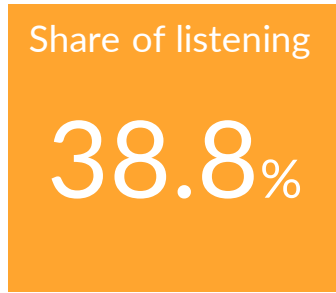


People 25-39 listen to most audio At Home where Commercial radio accounts for the largest share of commercial listening. In Car audio listening is strongly the domain of Commercial Radio with nearly 80% of that environment.

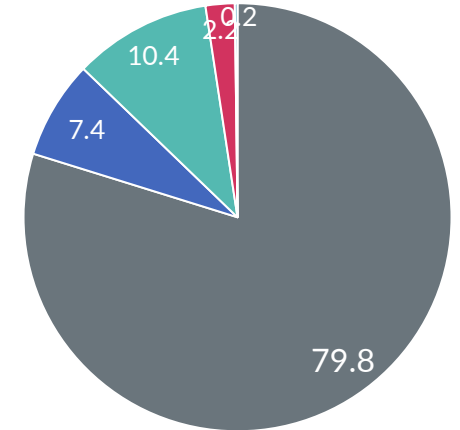
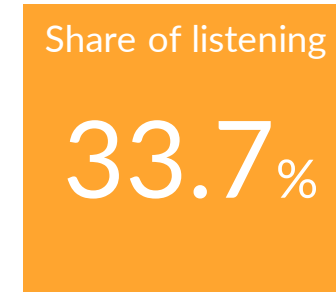
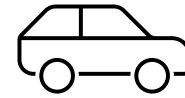


P25-39

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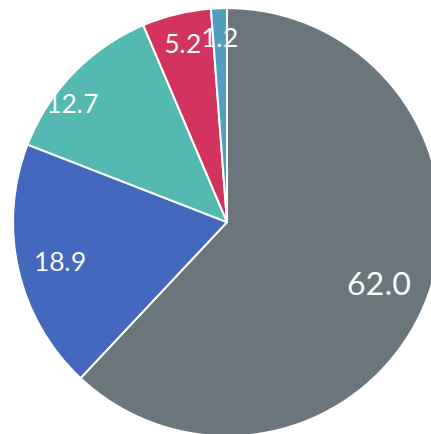
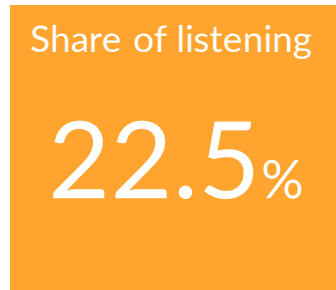
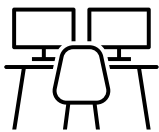


## Car

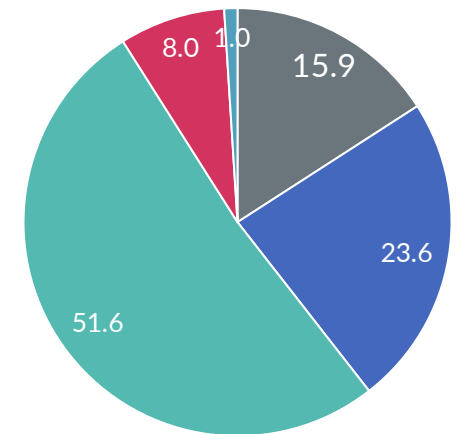
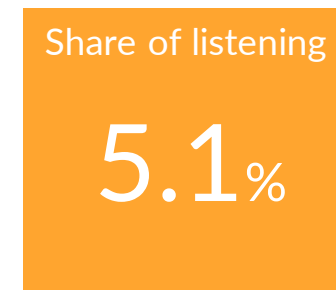


■ Commercial radio\* ■ Free music streaming ■ Free Podcasts ■ Online music videos ■ TV music channels

## Work



## Elsewhere

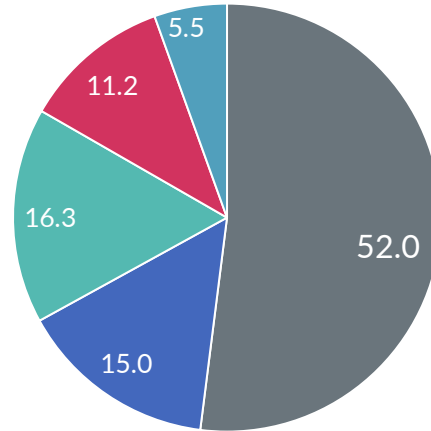
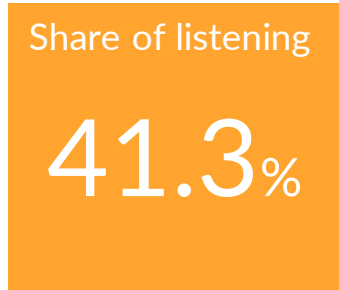


The key 25-54 demographic listens to commercial radio mostly At Home with over 41% and In Car with over 31%. Commercial radio has a dominant lead in listening in both.

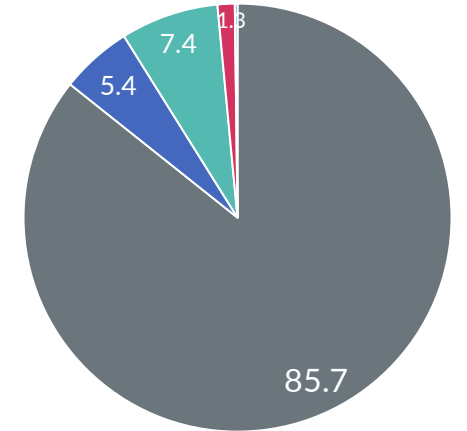
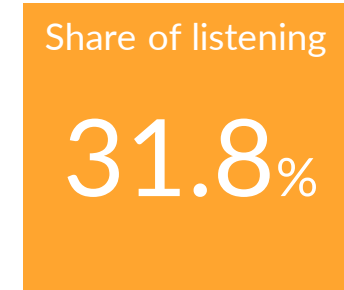
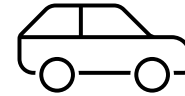


P25-54

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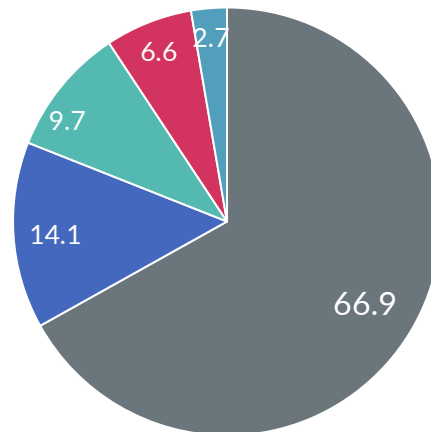
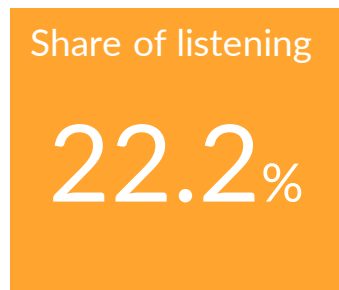
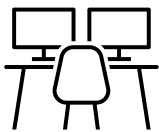


## Car

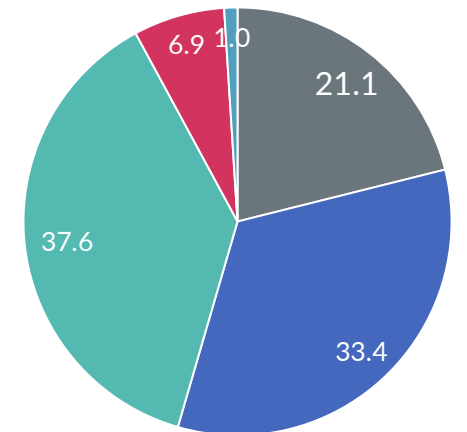
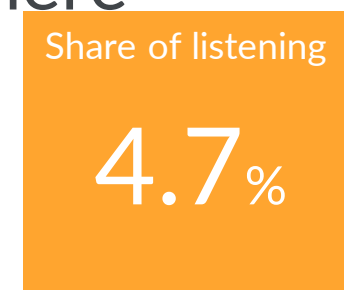


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## Work



## Elsewhere



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# AUDIO by SESSIONS



Commercial Radio listening for People 10+ dominates across the day, but particularly so in the Breakfast & Morning time when listening to Commercial radio accounts for over 80% of all listening.



### Radio dominates commercial listening across the day

