

Share of Audio – FAQ's

Methodology

Q: How many people were recruited?

A: 1,123 (1,000) Australians 10+ across the 5 Metro capital cities.

Q: How did they complete the survey?

A: The respondents were asked to complete a listening diary which required them to outline what audio they listened to for every 15 minutes within a 24 hour day, over the course of 7 days. 80% of respondents were given paper diaries, while 20% filled out e-diaries online.

Q: Has this research been done anywhere else?

A: The Share of Audio study was inspired by research commissioned by Edison Research in the US, which has been tracking audio listening trends in the US since 2014.

Q: How were people recruited?

A: Those chosen to complete the diary were individuals who had previously filled out a radio ratings diary for a metro radio survey. Both radio listeners and non-listeners were recontacted to participate in the survey. Recruitment was done in line with the ABS population figures, and respondents were chosen using random selection methodology.

Q: Is this sample representative of the population?

A: Respondents were recruited to be representative of the population. Sample weights are calculated using age, gender and region population benchmarks (as determined by ABS figures).

Q: When was the study done?

A: The survey was done during August and September 2016 (21st August – 3rd September).

Q: How were certain types of audio classified?

A: Respondents were given a range of options including

- **Australian Radio** all live radio listening to any Australian radio station, including live radio listening via station websites, apps, television sets and digital radio (DAB+) receivers.
- **Non Australian Radio** all listening to non Australian radio stations and/or to any customised listening/playlists using these radio apps.
- **Pandora:** all listening to the personalised internet radio service.
- **Spotify:** all listening to the music, podcast and video streaming service.
- **Apple Music:** all listening to streaming music via the Apple Music app.
- **Online Music Videos:** all listening to music videos/playlists via the web e.g. YouTube, Vevo, Dailymotion etc.
- **TV Music Channels:** all listening via television stations that play music or music videos.
- **Podcasts:** digital audio files that can be downloaded to a computer or media player.
- **Your Own Music:** downloads, CDs etc.
- **Other Audio:** all listening to any other types of audio (examples included audio books, live concerts)

It's important to note that GfK recontacted respondents who listed 'other audio' to further clarify their answer, and correctly categorise the audio chosen.

Q: How do you determine if somebody is a "listener"?

A: When completing a diary, respondents select what audio they listened to, as well as the source, for every quarter hour, in a 24 hour period, over 7 days. Conversely, if a respondent stated they didn't listen, those results were used to reflect behaviours of non-listeners

Q: Will this study be done again?

A: Yes. It is important to understand the audio landscape at any point in time, but just as important to gain an understanding of trends. The *Share of Audio* research is the independent authoritative data source on share of Audio in Australia and will be conducted annually.

Q: You only mention Spotify, Pandora and Apple music. What about Tidal, SoundCloud, RDIO etc?

A: Spotify, Pandora and Apple Music were found to be the most popular steaming services. Individuals were given the opportunity to include other streaming services in 'Other Audio', however no other streaming services were recorded in the diaries.

Q: How is TSL calculated?

A: Within each respondents diary every 15 minute interval where there was listening to a particular audio type was added together for the 24 hour period. Taking into account that listening was measured over a 7 day period, the average audio listening was calculated to give a daily figure.

It's important to note the TSL figure is based on an average of all Australians 10+ rather than listeners of specific audio types.

Q: How is share calculated?

A: Share is calculated by looking at the average audience for an audio type, expressed as a percentage of all people listening to audio, and it takes into account both the reach and time spent listening of each audio type. It shows how much of the total listening is tuned to a particular audio type (i.e., all audio type shares add up to 100%).

Q: How is reach calculated?

A: Reach is calculated by adding together the total number of different respondents who listened to an audio type for at least one 15 minute interval across the listening period. Taking into account that listening was measured over a 7 day period, the reach is averaged to give a daily figure.

Q: How do I source this study?

A: GfK Australian Share of Audio Study - 2016

Results

Q: XY AND Z streaming service released figures stating that their average time listening was much higher than what you've published. Why is there such a difference?

A: - The share of audio study looks at the average time listening by all Australians aged 10+. This figure includes those that don't listen to any audio. Other studies showing longer time spent listening figures are likely to be reporting the average amount of time a listener spends listening to a particular audio source.

For example, when using the GfK Radio Ratings, TSL figures the numbers represent the length of time 2UE listeners spend listening to 2UE, not the length of time all Australians spend listening to 2UE. The TSL would be read as, on average each day, 2UE listeners listen to 2UE for 2h and 54 minutes. (Daily TSL for 2UE, People 10+ Sydney, Metro Survey 6, 2016)

Q: Why do streaming services refer to themselves as "radio" i.e Pandora radio, Spotify radio?

A: Given the success of radio as a medium, streaming services have tried to position themselves as radio, by referring to themselves as "internet radio".

Music streaming services such as Pandora, Spotify and Apple music deliver audio content to their audiences via streaming. These services are not radio, as free to air live broadcast radio is transmitted via AM/FM/DAB+ frequencies.

Commercial radio pays a % of gross revenue in licence fees, have Australian music quota requirements, advertising restrictions, compliance and reporting obligations and essential emergency services broadcast obligations. Streaming services do not and are not radio stations.