

# GfK AUSTRALIAN SHARE OF AUDIO<sup>®</sup> 2018

Deb Hishon, Media Measurement Director. GfK

# Audio types captured in the diary



Source: GfK Share of Audio 2018, P10+

\*Both free and paid service  
^Both free and paid services e.g. YouTube Music, TIDAL, Deezer, Google Play Music, Amazon Music, Soundcloud, etc.

## How is Other Audio defined?

The majority of Other Audio has been clarified with the respondent

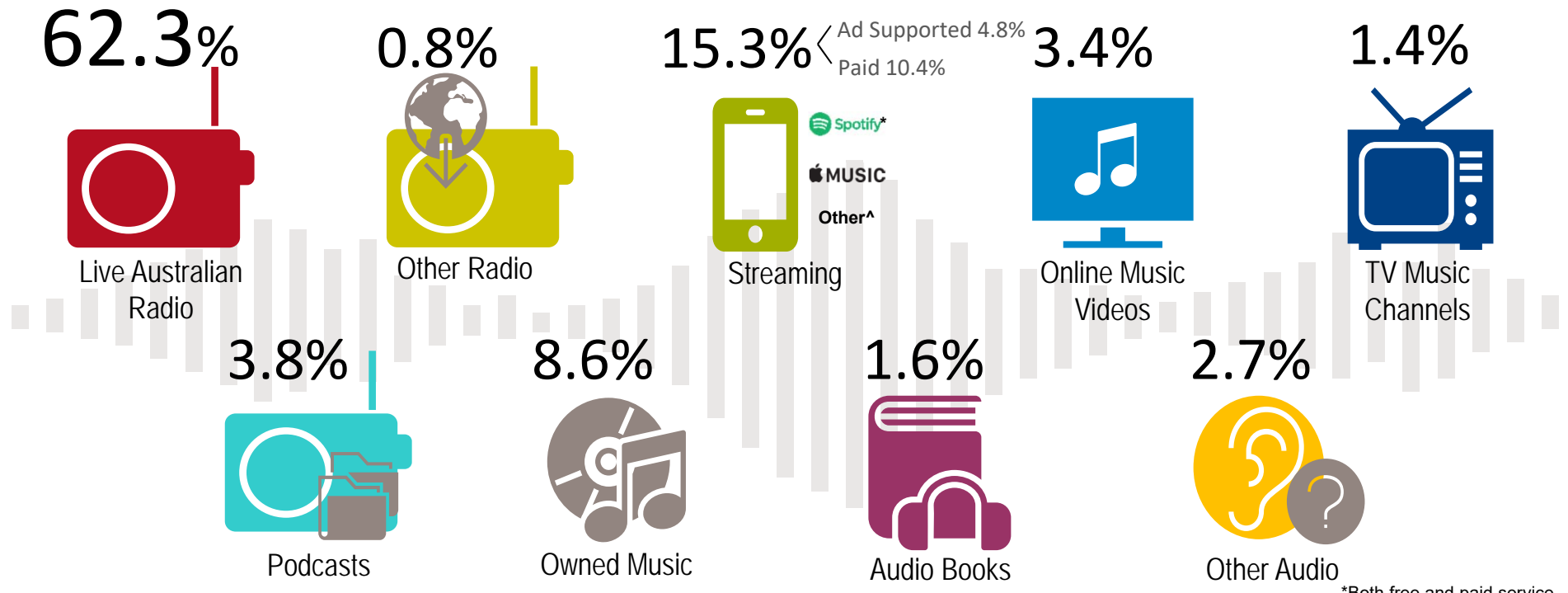
### Included

- ✓ Music playing at various locations (gym, shopping centres, place of work, restaurant)
- ✓ DJ, pub music and parties
- ✓ Live concerts

### Removed:

- ✗ Television / movie / video viewing
- ✗ Gaming
- ✗ Band, choir and music practice
- ✗ Music lessons / playing an instrument

# Share of Audio

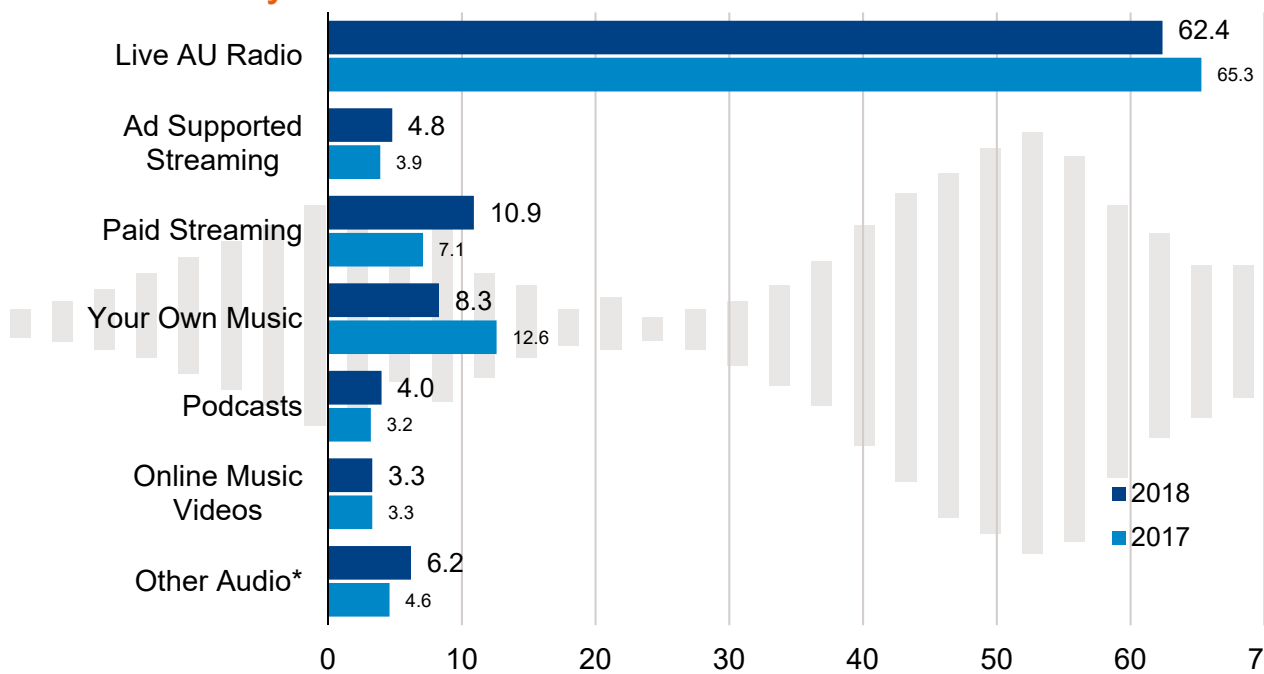
\*Both free and paid service

Source: GfK Share of Audio 2018, P10+, Share of listening (%), Mon-Sun 12mn-12mn

# Share of Audio



## Metro Only



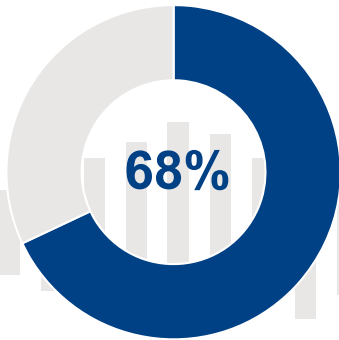
### Radio remains the dominant audio platform

- The growth in streaming has primarily come from owned music
- Podcasts and Audio Books also experienced growth in 2018

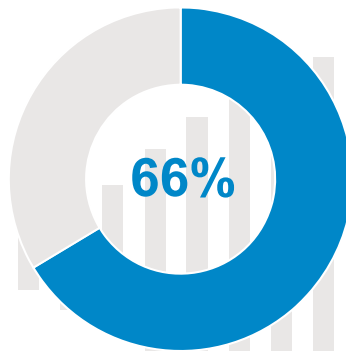
Source: GfK Share of Audio, SMBAP, P10+, Share of listening (%), Mon-Sun 12mn-12mn

\* Other Audio includes audio books, TV music channels & non-AU radio

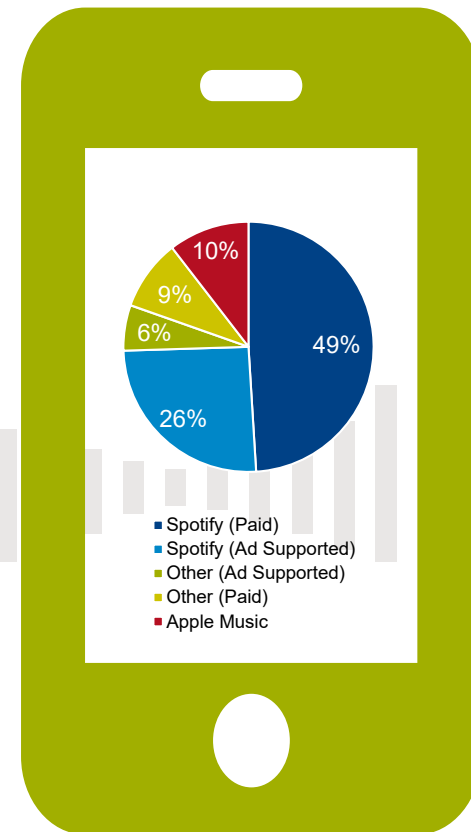
# Share of listening by streaming service



of streaming listening is paid



of Spotify listening is paid

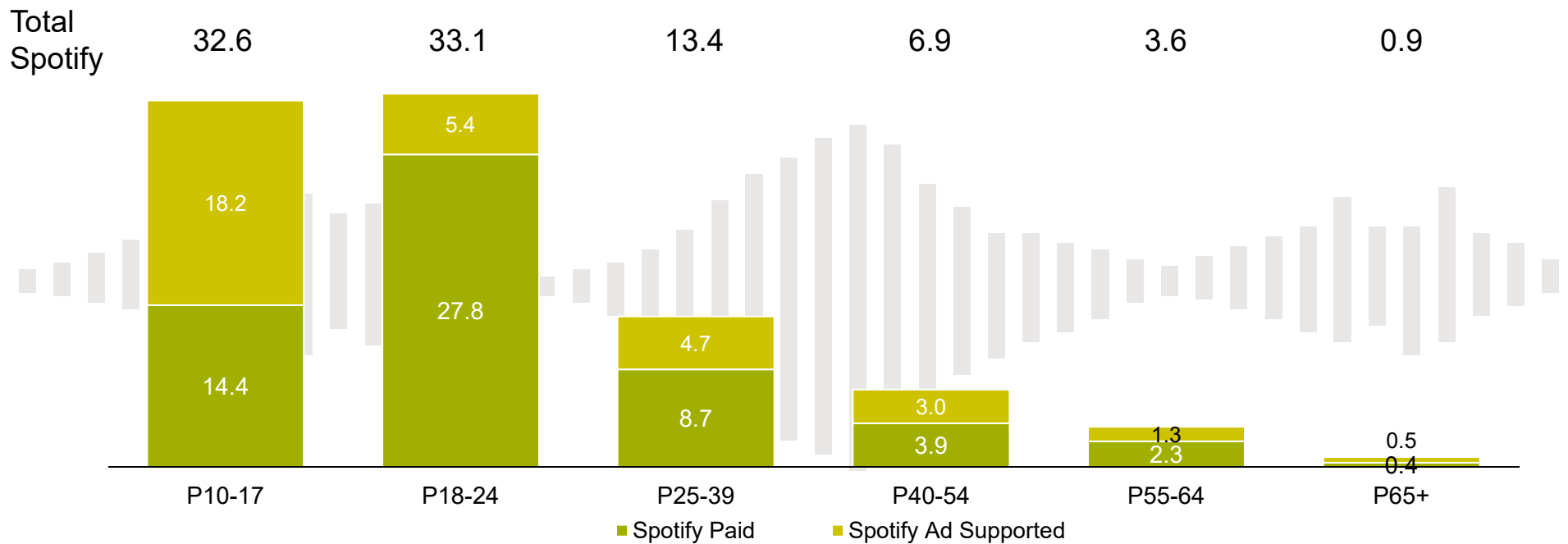


Source: GfK Share of Audio 2018, P10+, Share of listening (%), Mon-Sun 12mn-12mn

# Spotify Streaming Share of listening Paid vs. Ad Supported by age

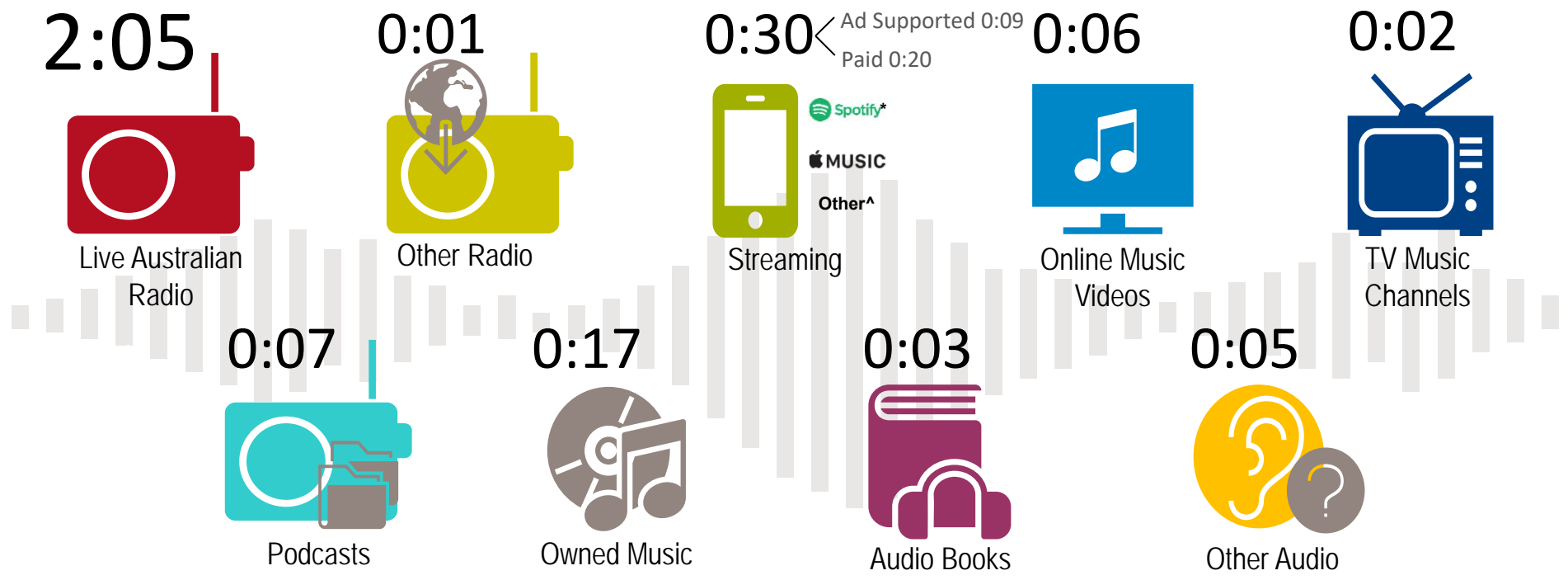


84% of Spotify streaming listening by P18-24 is paid



Source: GfK Share of Audio 2018, P10+, Share of listening (%), Mon-Sun 12mn-12mn

Daily Time Spent

\*Both free and paid service

^Both free and paid services e.g. YouTube Music, TIDAL, Deezer, Google Play Music, Amazon Music, Soundcloud, etc.

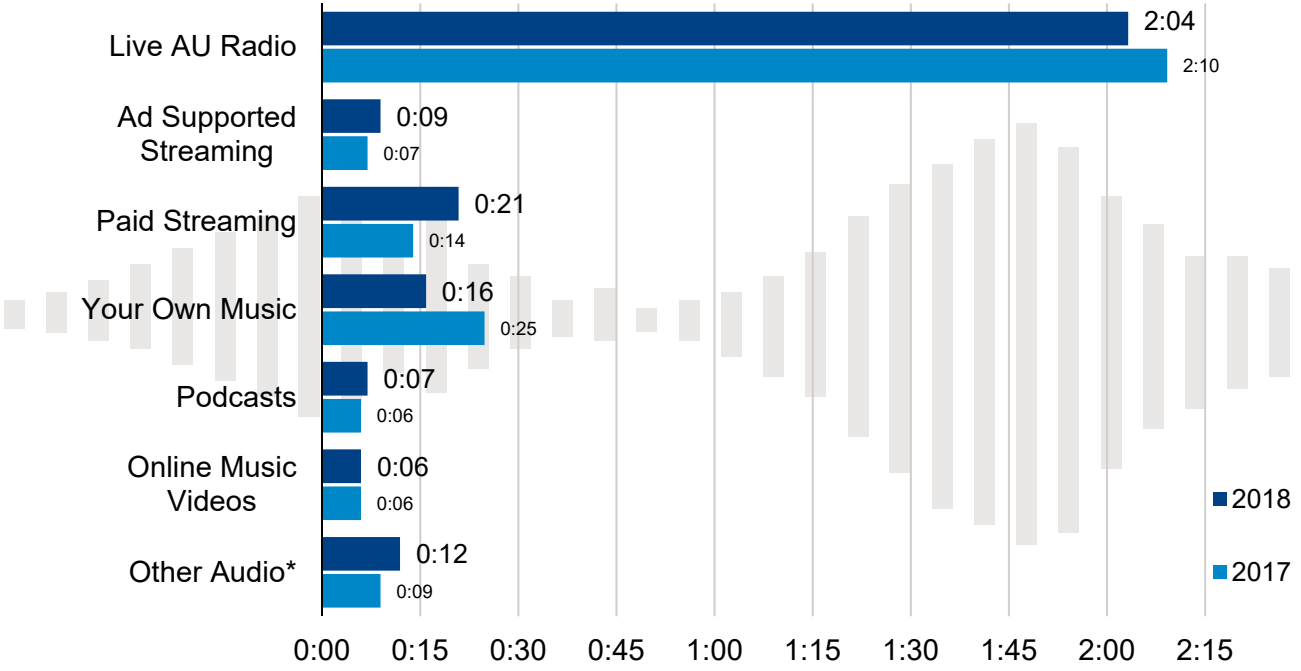
Source: GfK Share of Audio 2018, P10+, Average time spent listening (hh:mm), Mon-Sun 12mn-12mn



# Daily Time Spent



## Metro Only



**Live Australian Radio continues to dominate**

- Growth in time spent listening to streaming has mostly come from owned music

Source: GfK Share of Audio 2018, P10+, Average time spent listening (hh:mm), Mon-Sun 12mn-12mn

\* Other Audio includes audio books, TV music channels & non-AU radio

# Daily Reach



66.4%



Live Australian Radio

1.4%



Other Radio

21.3%

Ad Supported 8.2%  
Paid 13.9%



Spotify\*  
Apple MUSIC  
Other^

Streaming

6.7%



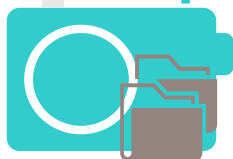
Online Music Videos

2.9%



TV Music Channels

6.8%



Podcasts

14.8%



Owned Music

2.9%



Audio Books

3.4%



Other Audio

\*Both free and paid service

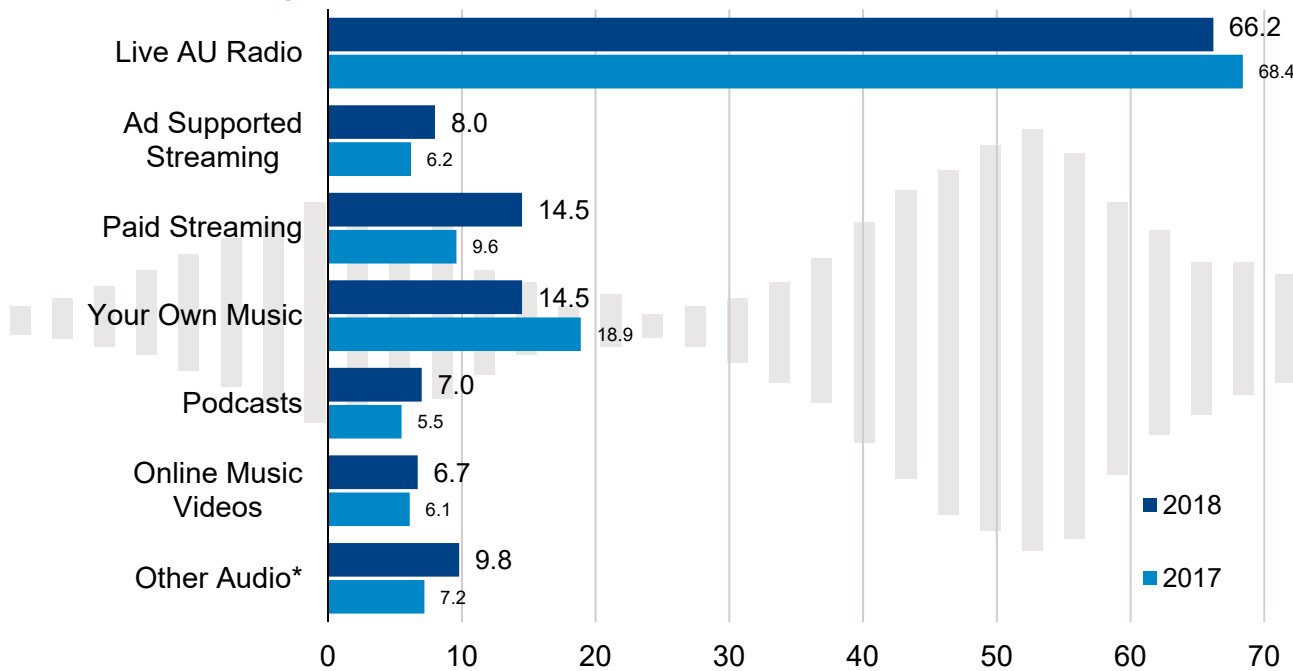
^Both free and paid services e.g. YouTube Music, TIDAL, Deezer, Google Play Music, Amazon Music, Soundcloud, etc.

Source: GfK Share of Audio 2018, P10+, Average time spent listening (hh:mm), Mon-Sun 12mn-12mn

# Daily Reach



## Metro Only



### Radio remains the widest reaching audio platform

- The growth in streaming has primarily come from owned music
- Podcasts, Online Music Videos and Audio Books also experienced growth in 2018

Source: GfK Share of Audio, SMBAP, P10+, Daily Cume (%), Mon-Sun 12mn-12mn

\* Other Audio includes audio books, TV music channels & non-AU radio

Daily Reach % by streaming service



Nearly two thirds of streaming listeners use paid services

		Daily Reach %
Spotify®	Total	<b>15.8%</b>
	Paid	9.5%
	Ad Supported	6.6%
<b>Apple MUSIC</b>		<b>2.9%</b>
Other Music Streaming^	Total	<b>3.7%</b>
	Paid	1.9%
	Ad Supported	1.8%

Source: GfK Share of Audio 2018, P10+, Daily Cume (%), Mon-Sun 12mn-12mn

^e.g. YouTube Music, TIDAL, Deezer, Google Play Music, Amazon Music, Soundcloud, etc



 COMMERCIAL RADIO  
AUSTRALIA

 GfK

Share of Audio  
in a Commercial  
Environment

## Establishing the Commercial environment



Removing audio sources such as owned music, paid streaming, non-AU radio, audio books and other audio provides a picture of the commercially competitive landscape.

Commercial Radio figures have been calculated using Radio Ratings figures from the equivalent survey period, with results calculated at a 10+ level, as well as by age group.

Commercial environment includes:

- ✓ Commercial Radio\*
- ✓ Ad Supported Streaming
- ✓ Podcasts
- ✓ Online Music Videos
- ✓ TV Music Channels

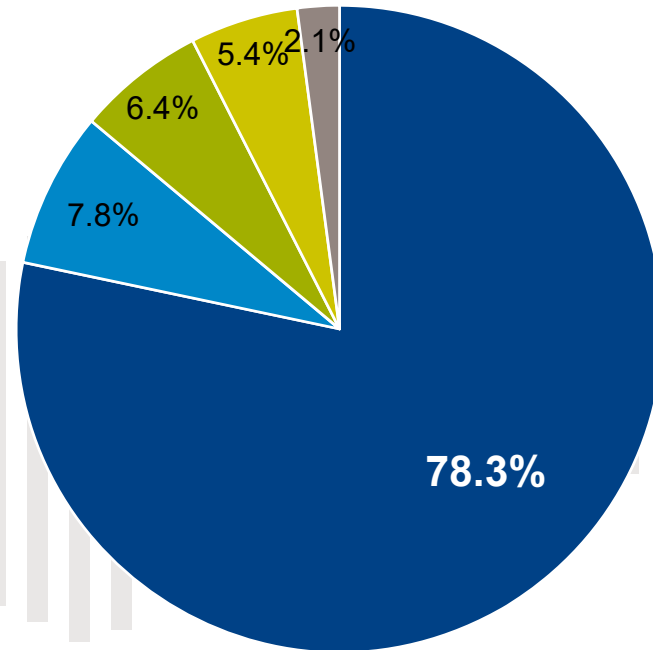
Source: GfK Share of Audio 2018, P10+

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

# The Commercial Environment



People 10+  
Share of  
Commercial  
Audio



- Commercial Radio\*
- Ad Supported Streaming
- Podcasts
- Online Music Videos
- TV Music Channels

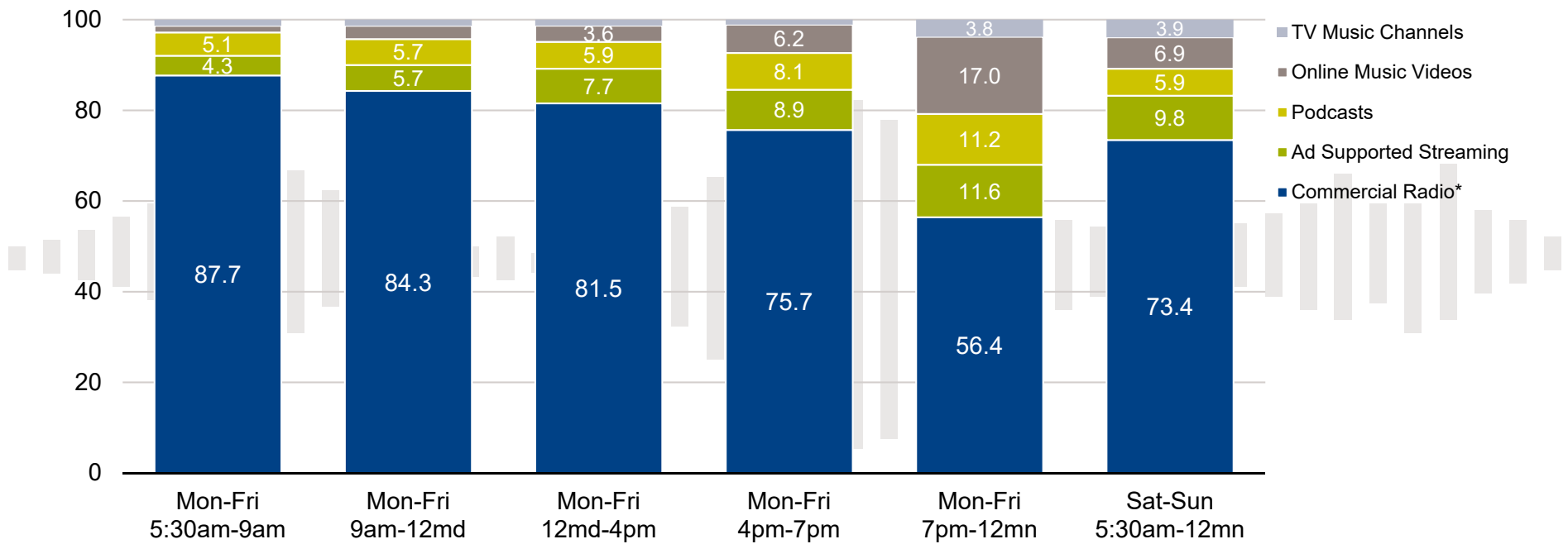
Source: GfK Share of Audio 2018, P10+

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

# When are people listening to commercial audio?



Commercial Radio is the dominant audio platform across each daypart

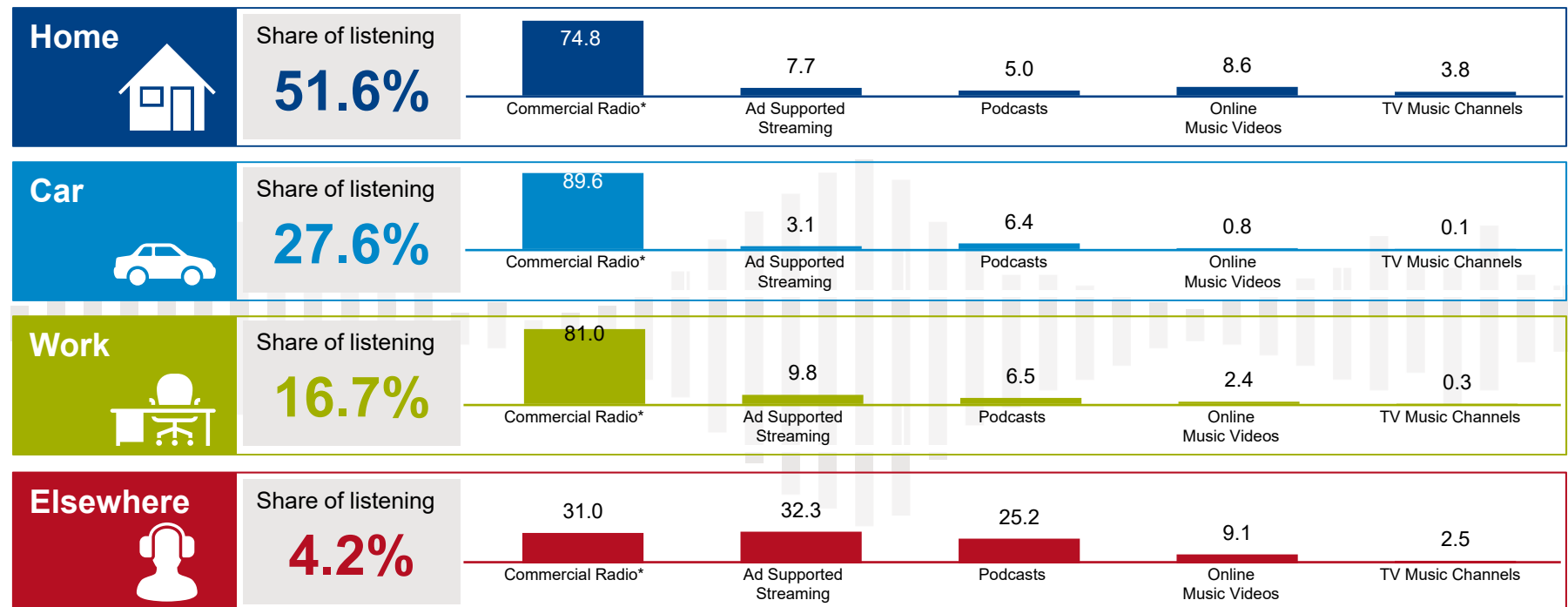


Source: GfK Share of Audio 2018, SMBAP, P10+, Share of commercial listening (%)  
 \*Commercial Radio has been calculated by adjusting Live AU Radio take into account the proportion of listening done to ABC stations.



# Where are people listening to commercial audio?

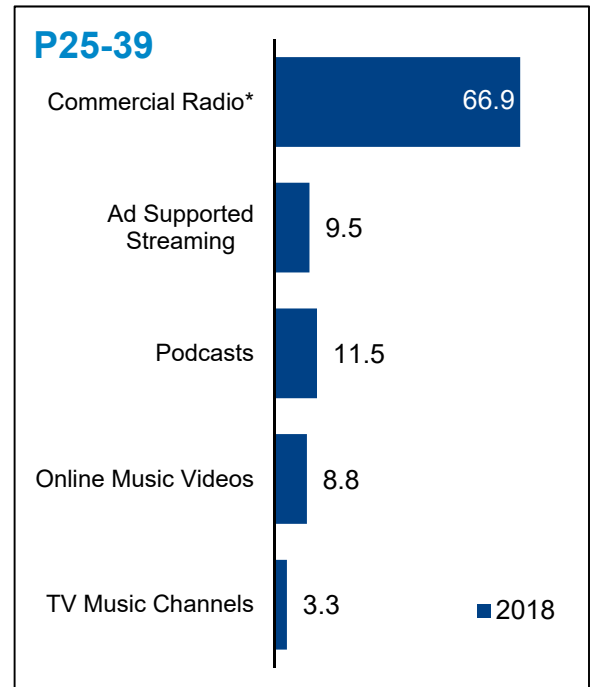
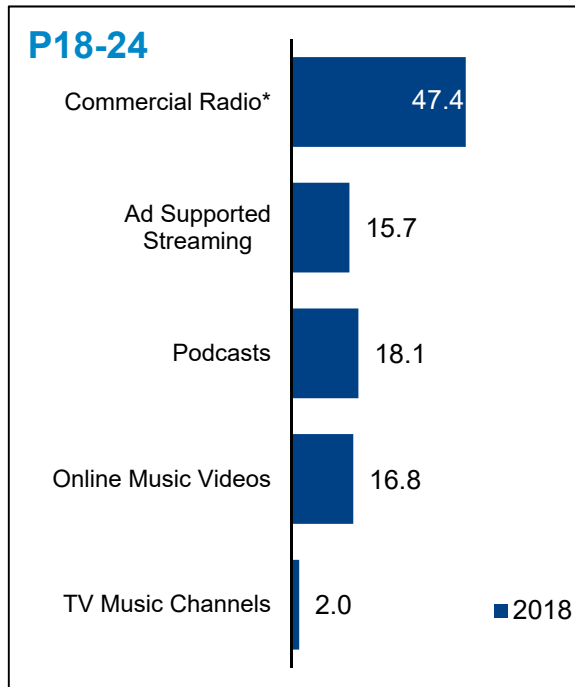
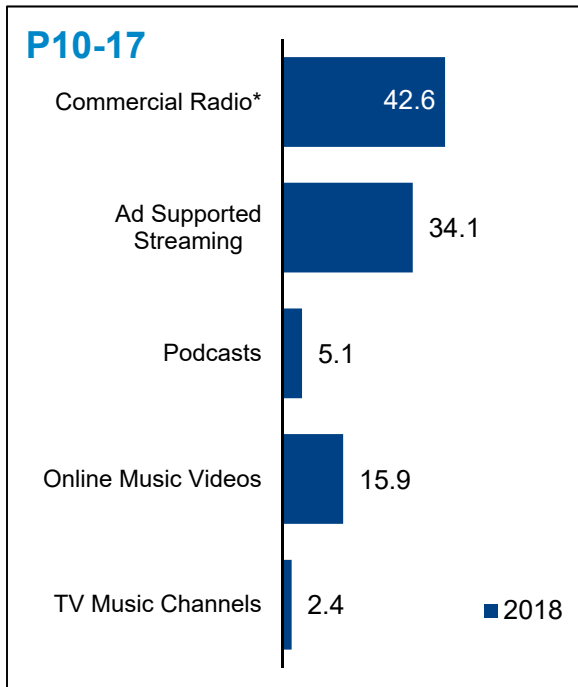
The majority of commercial audio listening is at home



Source: GfK Share of Audio 2018, SMBAP, P10+, Share of Commercial Listening, Mon-Sun 12mn-12mn

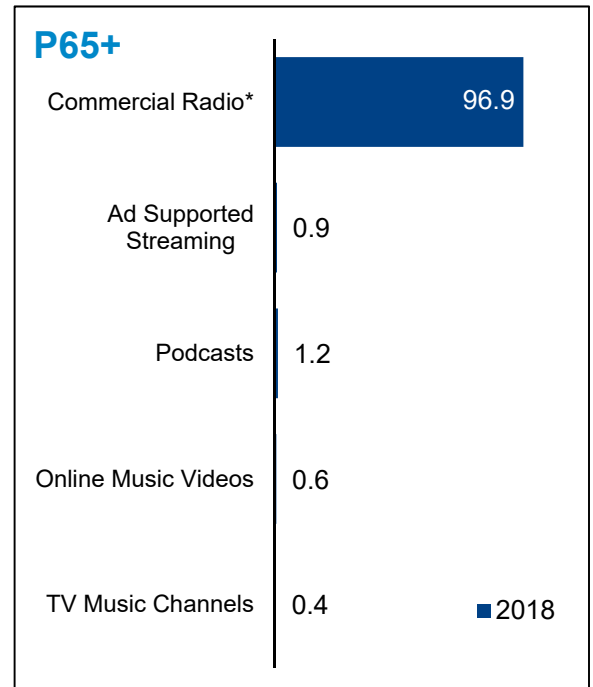
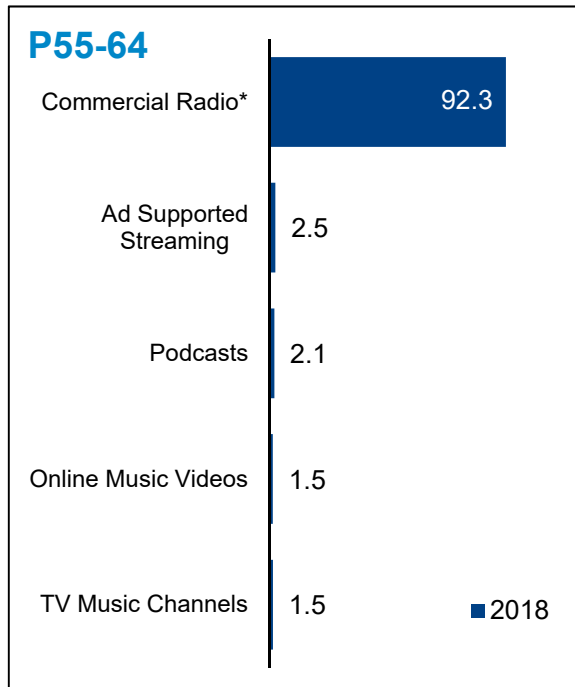
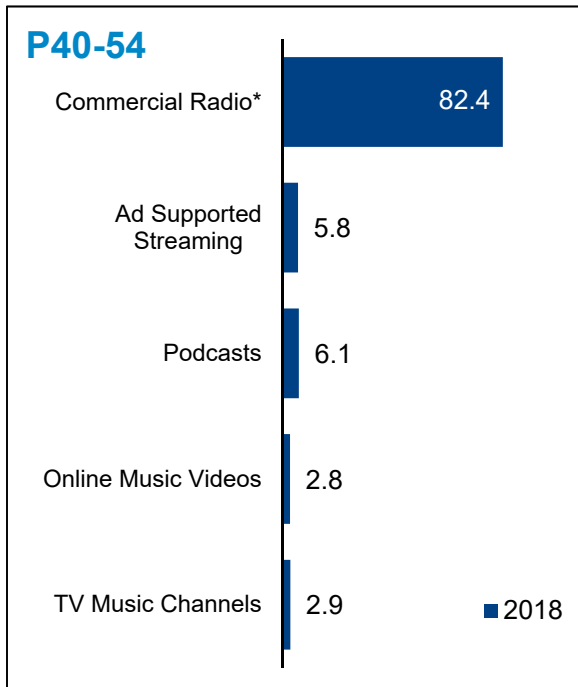
\* Other Audio includes audio books, TV music channels & non-AU radio

# Commercial Share of Audio: P10-39

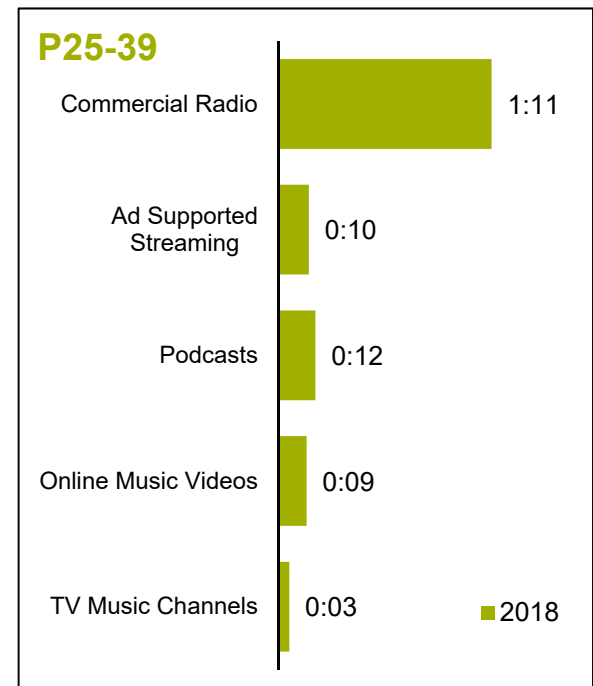
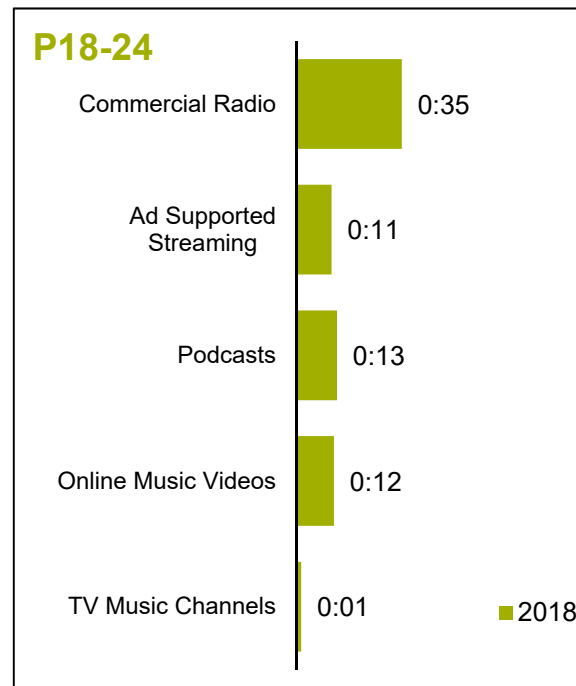
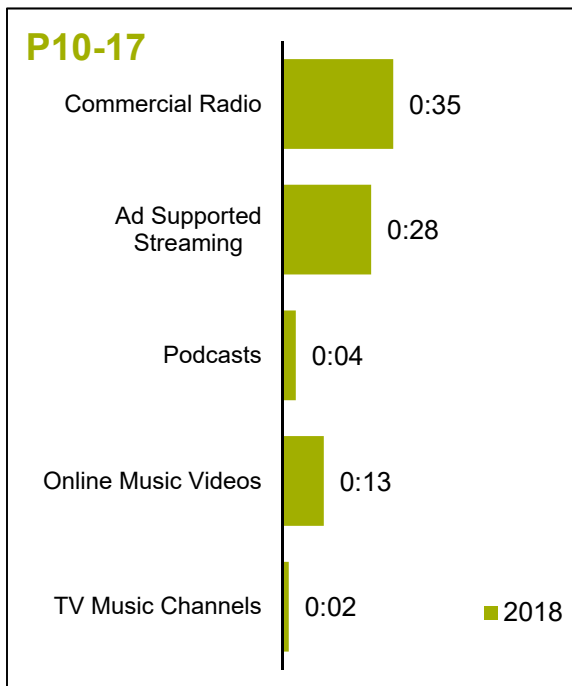
Source: GfK Share of Audio, SMBAP, Share of listening (%), Mon-Sun 12mn-12mn  
 \*Commercial Radio has been calculated by adjusting Live AU Radio take into account the proportion of listening done to ABC stations.

# Commercial Share of Audio: P40+

Source: GfK Share of Audio, SMBAP, 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.

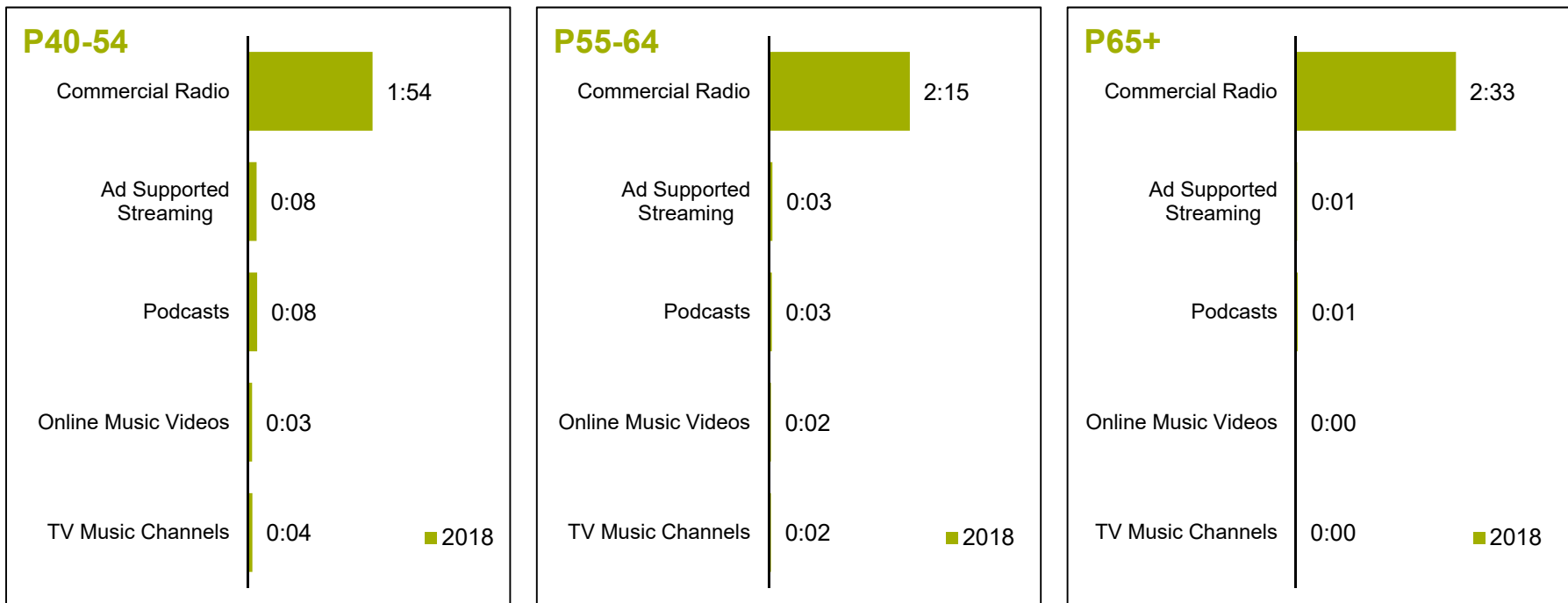
Commercial  
Daily Time  
Spent:  
P10-39



Source: GfK Share of Audio, SMBAP, 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.

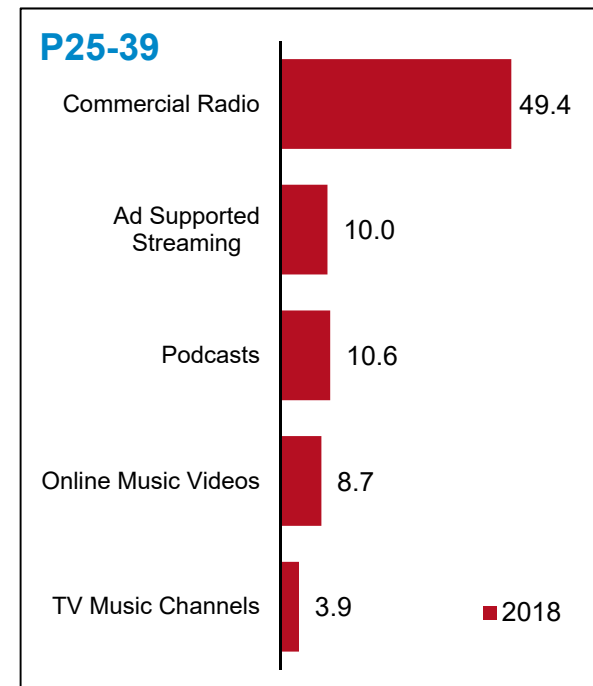
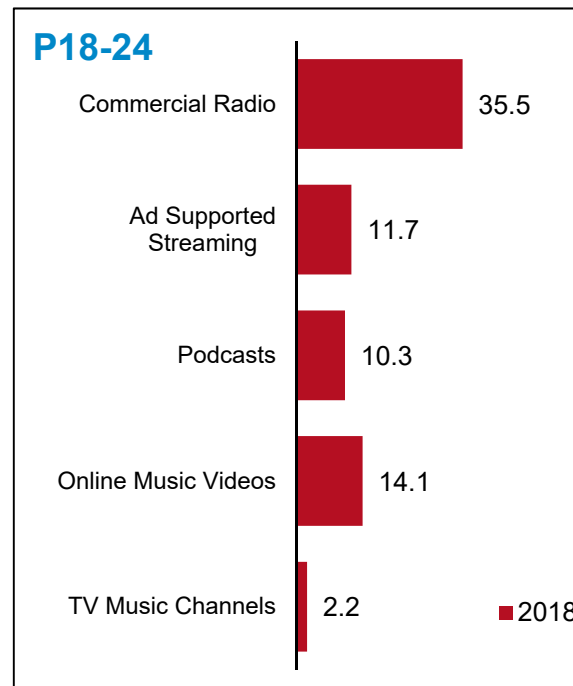
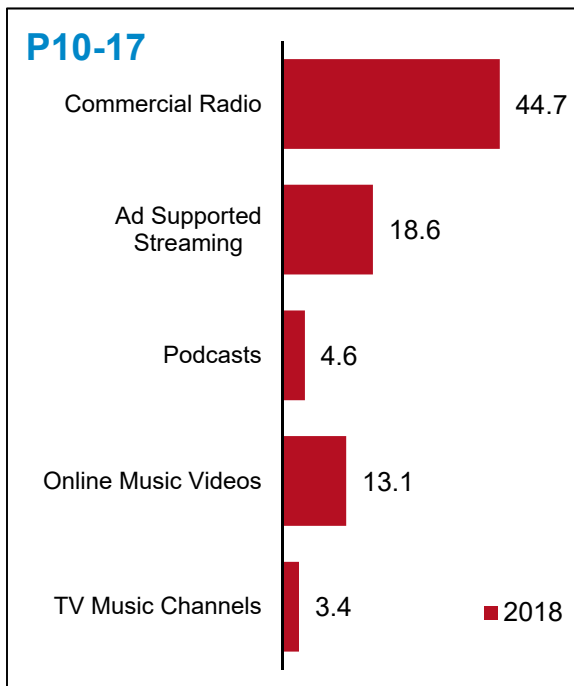
Commercial  
Daily Time  
Spent:  
P40+



Source: GfK Share of Audio, SMBAP, 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.

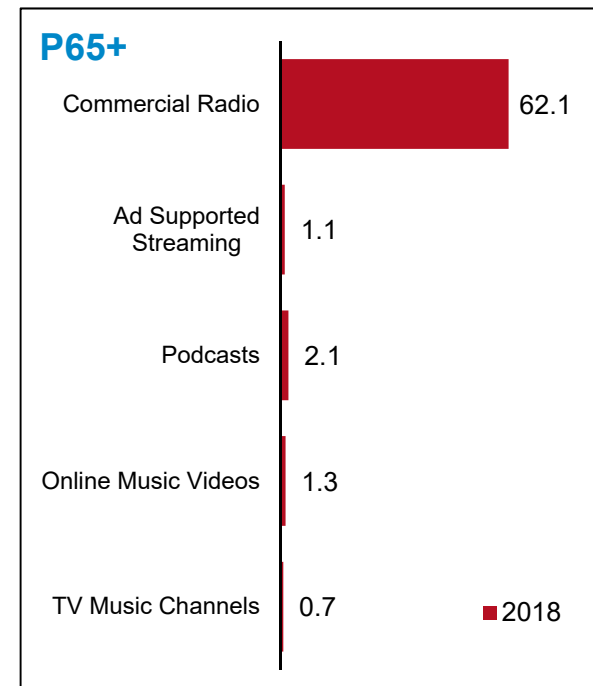
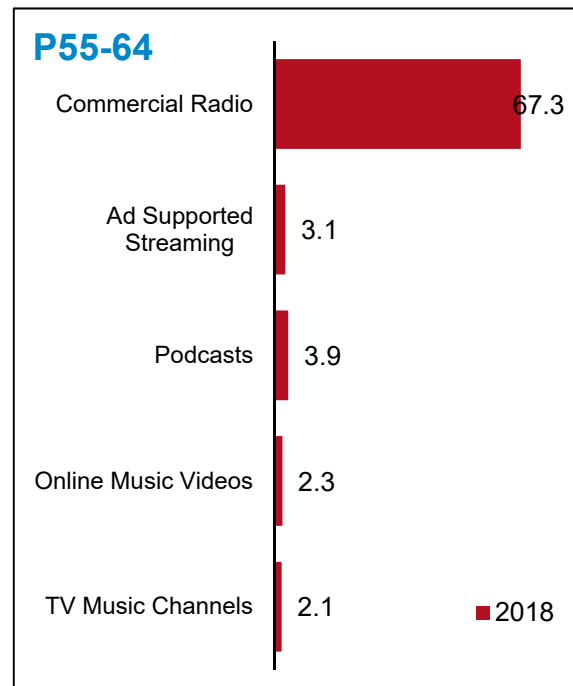
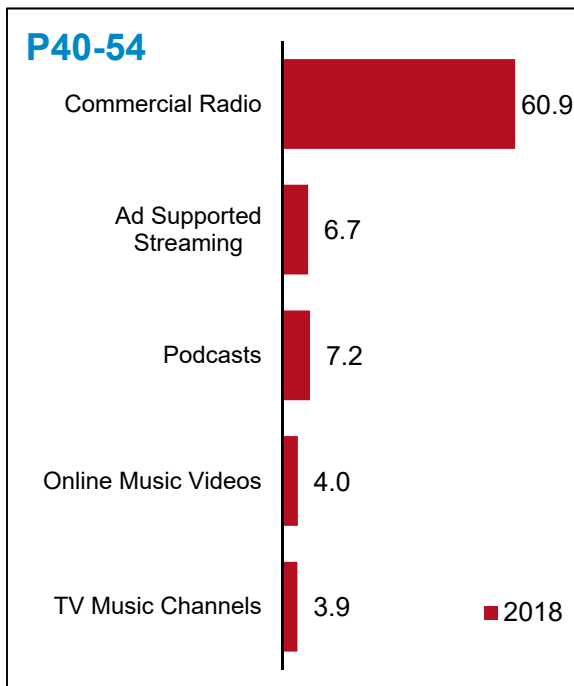
# Commercial Daily Reach: P10-39



Source: GfK Share of Audio, SMBAP, 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  
Daily Reach:  
P40+



Source: GfK Share of Audio, SMBAP, 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.

## Last sound bites...



Australian Radio accounts for over 60% of all audio listening



Australian Radio is the #1 audio platform consumed by the under 40s



Australians spend twice as long listening to Live AU Radio than ALL other platforms combined



60% of Spotify listeners are using the paid service and cannot be reached by ads

Commercial radio is the dominant audio platform across all dayparts

Live Commercial AU Radio #1 audio platform

10-17

18-24

25-39

40+

Over two thirds of streaming listening is to a paid subscription

78.3%





Questions?

Growth from Knowledge