THE POWER OF RADIO

March 2020
Radio is a strong brand building medium, whilst also driving a great call-to-action.

It is a high reach medium that delivers long-lasting engagement and tangible results for advertisers.
95% of Australians listen to radio each week.
Almost 13.4 million Australians in the five metropolitan capital cities tune into radio each week.

Australians listen to over 16 hours of radio every week.

COMMERCIAL RADIO AUDIENCES AT AN ALL-TIME HIGH

Commercial radio’s audience has grown by 961,000 listeners (nearly 10%) in the last 5 years.

Source: GfK Radio Ratings, Sydney, Melbourne, Brisbane, Adelaide and Perth, Commercial stations (simulcast and DAB+), Cume (000), SI-8 2019, Mon-Sun 12mn-12mn, All People 10+
RADIO CONTINUES TO SHOW STRENGTH ACROSS ALL KEY DEMOS

### WEEKLY LISTENING BY DEMOGRAPHIC – Sydney, Melbourne, Brisbane, Adelaide and Perth

<table>
<thead>
<tr>
<th></th>
<th>People 10+</th>
<th>People 10-17</th>
<th>People 18-24</th>
<th>People 25-39</th>
<th>People 40-54</th>
<th>People 55-64</th>
<th>People 65+</th>
<th>Men 10+</th>
<th>Women 10+</th>
<th>Grocery Buyers</th>
<th>Homes w/ kids &lt;17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cume (000)</td>
<td>10,891</td>
<td>1,271</td>
<td>1,265</td>
<td>2,914</td>
<td>2,527</td>
<td>1,398</td>
<td>1,516</td>
<td>5,256</td>
<td>5,634</td>
<td>5,513</td>
<td>3,936</td>
</tr>
<tr>
<td>Cume %</td>
<td>77.3</td>
<td>86.8</td>
<td>77.4</td>
<td>77.3</td>
<td>79.8</td>
<td>78.4</td>
<td>66.5</td>
<td>75.6</td>
<td>78.9</td>
<td>77.1</td>
<td>82.9</td>
</tr>
</tbody>
</table>

Source: GfK Radio Ratings, Sydney, Melbourne, Brisbane, Adelaide and Perth, Commercial stations (simulcast and DAB+), SI-8 2019, Mon-Sun 12mn-12mn
Radio reaches more than 8 million listeners during all key day parts in Sydney, Melbourne, Brisbane, Adelaide and Perth.

- **10.5 million** metro listeners tune into **Breakfast Radio**
  - Mon-Fri 0530–0900

- **8.1 million** metro listeners tune into **Morning Radio**
  - Mon-Fri 0900–1200

- **8.9 million** metro listeners tune into **Afternoon Radio**
  - Mon-Fri 1200–1600

- **9.3 million** metro listeners tune into **Drive Radio**
  - Mon-Fri 1600–1900

Source: GfK Radio Ratings, Sydney, Melbourne, Brisbane, Adelaide and Perth, Total Radio Listeners, Cume (000), SI-8 2019, BMAD M-F, People 10+
LIVE AUSTRALIAN RADIO CONTINUES TO DOMINATE THE AUDIO LANDSCAPE IN AUSTRALIA

Australians spend an average of 3 hours 28 minutes listening to audio every day, with 2 hours 7 minutes spent listening to live Australian radio.
Live Australian commercial radio accounts for nearly three quarters of all listening on audio platforms that have advertising.

Source: GfK Australian Share of Audio® 2019 – Share of commercial listening (%), Mon-Sun 12mn-12mn, People 10+.

*Commercial Radio has been calculated by adjusting Live AU Radio to take into account the proportion of listening done to ABC stations.
LIVE AUSTRALIAN COMMERCIAL RADIO HAS NEARLY 10x THE SHARE OF THE FREE MUSIC STREAMING SERVICES COMBINED

Source: GfK Australian Share of Audio® 2019 – Share of commercial listening (%), Mon-Sun 12nn-12mn, People 10+
*Commercial Radio has been calculated by adjusting Live AU Radio to take into account the proportion of listening done to ABC stations
COMMERCIAL RADIO HAS THE HIGHEST SHARE AND REACH AMONG 10-17 YEAR OLDS

Share %

<table>
<thead>
<tr>
<th>Format</th>
<th>Share %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial radio*</td>
<td>43.9%</td>
</tr>
<tr>
<td>Free music streaming services</td>
<td>28.8%</td>
</tr>
<tr>
<td>Online music videos</td>
<td>14.7%</td>
</tr>
<tr>
<td>Podcasts</td>
<td>9.5%</td>
</tr>
<tr>
<td>TV music channels</td>
<td>3.2%</td>
</tr>
</tbody>
</table>

Daily reach %

<table>
<thead>
<tr>
<th>Format</th>
<th>Daily reach %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial radio*</td>
<td>45.8%</td>
</tr>
<tr>
<td>Free music streaming services</td>
<td>19.5%</td>
</tr>
<tr>
<td>Online music videos</td>
<td>14.0%</td>
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<tr>
<td>Podcasts</td>
<td>8.2%</td>
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<tr>
<td>TV music channels</td>
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Source: GfK Australian Share of Audio® 2019 – Share of commercial listening (%), Average time spent listening (h:mm), Daily Cume %, Mon-Sun 12mn-12mn
*Commercial Radio has been calculated by adjusting Live AU Radio to take into account the proportion of listening done to ABC stations
Commercial radio has the highest share and reach among 18-24 year olds.

Source: GfK Australian Share of Audio® 2019 – Share of commercial listening (%). Average time spent listening (h:mm), Daily Cume %, Mon-Sun 12mn-12mn

*Commercial Radio has been calculated by adjusting Live AU Radio to take into account the proportion of listening done to ABC stations
### Commercial Radio Has the Highest Share and Reach Among 25-39 Year Olds

<table>
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<tr>
<th></th>
<th>Share %</th>
<th>Daily Reach %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial radio*</td>
<td>63.7%</td>
<td></td>
</tr>
<tr>
<td>Podcasts</td>
<td>13.9%</td>
<td></td>
</tr>
<tr>
<td>Online music videos</td>
<td>10.8%</td>
<td></td>
</tr>
<tr>
<td>Free music streaming services</td>
<td>8.6%</td>
<td>3.0%</td>
</tr>
<tr>
<td>TV music channels</td>
<td>3.0%</td>
<td></td>
</tr>
<tr>
<td>Commercial radio*</td>
<td>47.8%</td>
<td></td>
</tr>
<tr>
<td>Podcasts</td>
<td>15.0%</td>
<td></td>
</tr>
<tr>
<td>Online music videos</td>
<td>11.7%</td>
<td></td>
</tr>
<tr>
<td>Free music streaming services</td>
<td>8.9%</td>
<td>3.3%</td>
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<tr>
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<td>3.3%</td>
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Source: GfK Australian Share of Audio® 2019 – Share of commercial listening (%). Average time spent listening (h:mm), Daily Cume %, Mon-Sun 12nn-12nn

*Commercial Radio has been calculated by adjusting Live AU Radio to take into account the proportion of listening done to ABC stations*
COMMERCIAL RADIO HAS THE HIGHEST SHARE AND REACH AMONG 40-54 YEAR OLDS

Source: GfK Australian Share of Audio® 2019 – Share of commercial listening (%). Average time spent listening (h:mm), Daily Cume %, Mon-Sun 12mn-12mn
*Commercial Radio has been calculated by adjusting Live AU Radio to take into account the proportion of listening done to ABC stations
## Commercial Radio Has the Highest Share and Reach Among 55-64 Year Olds

<table>
<thead>
<tr>
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<th>Share %</th>
<th>Daily reach %</th>
</tr>
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<tbody>
<tr>
<td>Commercial radio*</td>
<td>87.9%</td>
<td>66.6%</td>
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<td>4.1%</td>
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<td>Online music videos</td>
<td>3.5%</td>
<td>3.5%</td>
</tr>
<tr>
<td>Free music streaming services</td>
<td>2.5%</td>
<td>3.3%</td>
</tr>
<tr>
<td>TV music channels</td>
<td>2.1%</td>
<td>2.9%</td>
</tr>
</tbody>
</table>

Source: GfK Australian Share of Audio® 2019 – Share of commercial listening (%). Average time spent listening (h:mm). Daily Cume %, Mon-Sun 12mn-12mn.

*Commercial Radio has been calculated by adjusting Live AU Radio to take into account the proportion of listening done to ABC stations.*
COMMERCIAL RADIO HAS THE **HIGHEST SHARE AND REACH** AMONG OVER 65 YEAR OLDS

- **94.8%**
- **62.9%**

**Share %**
- Commercial radio*
- TV music channels
- Online music videos
- Podcasts
- Free music streaming services

**Daily reach %**
- Commercial radio*
- Online music videos
- Podcasts
- TV music channels
- Free music streaming services

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

Source: GfK Australian Share of Audio® 2019 – Share of commercial listening (%), Average time spent listening (h:mm), Daily Cume %, Mon-Sun 12mn-12mn
People are 6 times more likely to look for a specific brand online if they’ve heard it advertised on radio.
Radio increases ROI

Radio delivers an ROI of more than 20% when combined with TV or online.

- 23% Online + Radio
- 21% TV + Radio

Source: Colmar Brunton Media Spend ROI Study, 2015
RADIO IS STILL THE MOST PREFERRED IN-CAR AUDIO

Audio sources used in car in Australia – 2019

- AM/FM Radio: 85%
- CD Player: 38%
- Online Audio Streaming Services: 26%
- Owned Digital Music: 21%
- Podcasts: 12%

Base: Australian 18+ and has driven/ridden in car in last month – 87%
Source: The Infinite Dial Australia 2019, Edison Research
KEEP YOUR BRAND TOP-OF-MIND AMONGST CONSUMERS – ADD RADIO TO YOUR MARKETING MIX

4 out 5 people who intend to purchase the following products/services in the next 12 months listen to commercial radio:

- White goods: 82%
- Car: 81%
- Furniture: 81%
- Audio/Visual equipment: 80%
- Tablet/computer: 80%
- Finance/investment product: 79%

Source: GfK Radio Ratings, Sydney, Melbourne, Brisbane, Adelaide and Perth, Commercial stations (simulcast and DAB+), Cume %, SI-8 2019, Mon-Sun 12mn-12mn, All People 10+
Radio remains an important way to connect with audiences in summer.

Radio listening is strong over the summer months, providing advertisers with the opportunity to reach key audiences.

89% of radio listeners listen to radio as much or more in summer.

Almost 3 in 4 listeners agree that they are more likely to listen to media than watch it during the summer months, up from 2 in 3 in 2019.

74% of listeners agree that they would turn to radio for information in an emergency situation.

Source: GfK Radio Insights, Summer Listening, January 2020
NEW OPPORTUNITIES FOR ADVERTISERS

Radio has continually innovated to ensure it is active where audiences are most engaged.

[Diagram showing various options such as DAB+, Social, Apps, Websites, Voice, Podcasts, Events/Activations, AM/FM Radio, and integration with Alexa and Google, all under the Radio Alive logo.]
Radio is a cost-effective addition to any media plan.

Radio enables brands to build their share of voice, whilst also amplifying the impact of other channels.
WANT MORE INFORMATION?

Visit radioalive.com.au

Contact Briony McLean, Research & Insights Strategist, Commercial Radio Australia at briony.mclean@commercialradio.com.au