



Communications and media in Australia

Trends and developments
in viewing and listening 2020–21

June 2022

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Introduction

The Australian Communications and Media Authority's (ACMA's) purpose is to maximise the economic and social benefits of communications infrastructure, services and content for Australia. We do this by:

- > maintaining, enforcing and improving regulation to drive industry performance and protect consumers
- > managing public resources to enable industry to deliver existing and new services
- > understanding the changing media sector to inform decision-making.

The *Communications and media in Australia: Trends and developments in viewing and listening 2020–21* report provides an overview of the Australian broadcasting sector during the 2020–21 financial year. Drawing on a combination of industry data and primary consumer research, the report describes key developments in the provision, take-up and use of media infrastructure and services, and considers drivers and barriers that underpin and shape the adoption of technology. Key developments outside this period are also highlighted.

This report fulfills multiple legislative obligations under the *Australian Communications and Media Authority Act 2005*. These include requirements to:

- > report to and advise the minister in relation to the broadcast industry
- > make information available to the public about the broadcast sector
- > inform ourselves and advise the minister on technological advances and service trends in the broadcasting, internet and datacasting industries.

The release of the *Communications and media in Australia: Trends and developments in viewing and listening 2020–21* report was delayed until after the 2022 federal election.

ACMA's annual consumer surveys

This report references our annual consumer surveys collected from 2017 to 2021. The most recent survey was undertaken from 15 to 28 June 2021. During this period – shortly before the Delta variant would cause Australia's 'third wave' of coronavirus infections – most of Australia was free of COVID-19 cases and restrictions. The survey assessed viewing and listening activity in the 6 months between December 2020 and June 2021.

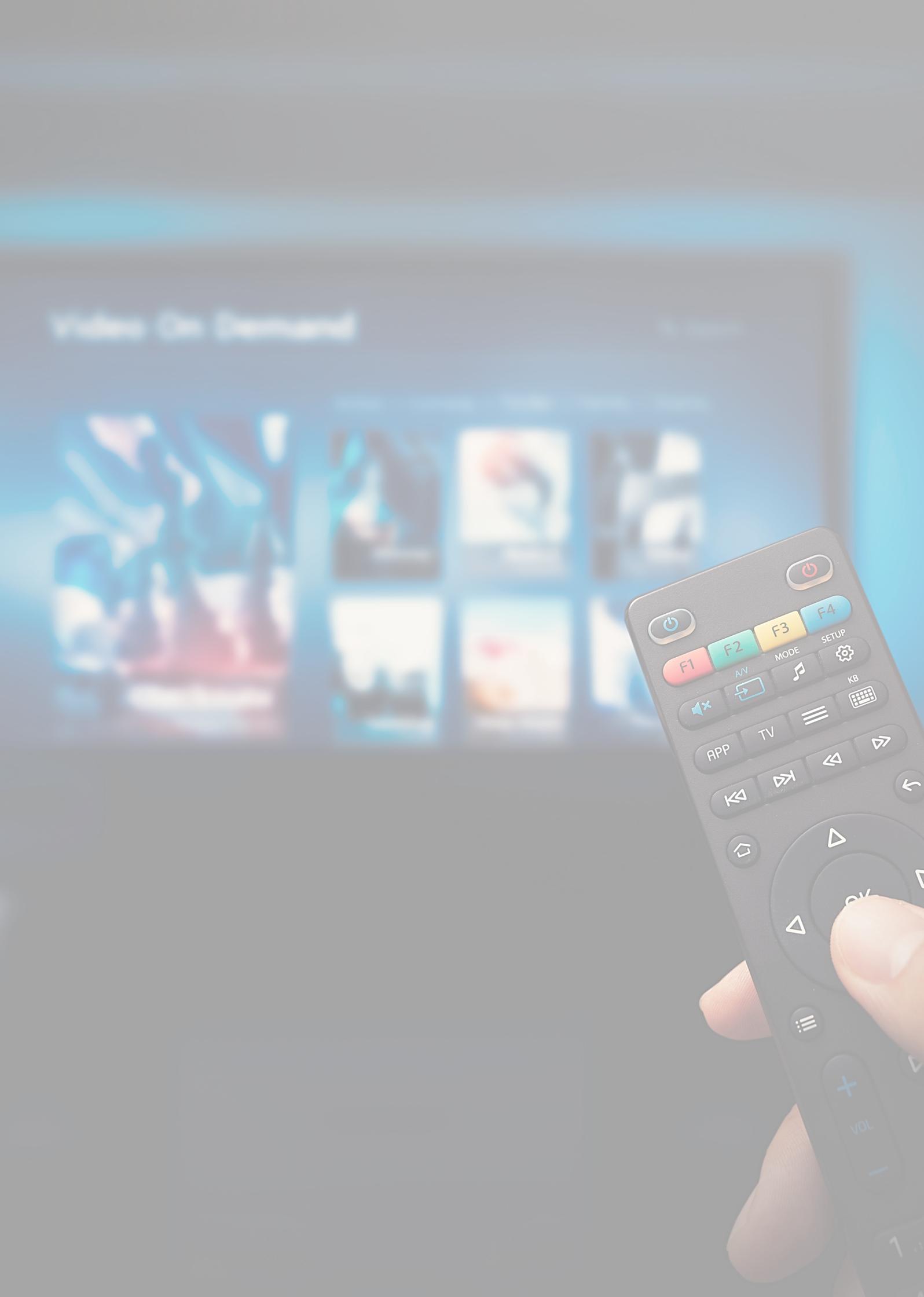
Notes regarding specific questions, survey design and sample sizes are under consumer survey graphs. Statistically significant changes are highlighted in figures using the below symbols:

- > ▲ ▼ Significantly different to prior year at the 95% confidence level.
- > ▲ ▼ Significantly different to 2 years prior at the 95% confidence level.

Annual consumer survey findings referenced in this report are also available in our [*Communications and media in Australia: How we watch and listen to content*](#) interactive report.

researchacma

Our research program makes an important contribution to the ACMA's work as an evidence-based regulator. It informs our strategic policy development, regulatory reviews and investigations, and helps us to support a media and communications environment that works for all Australians. The research from which this report is drawn forms part of the [ACMA research program](#).



Windows On Demand

12:00



Executive summary

Terrestrial broadcast media has long been a staple of Australian content consumption, providing a variety of sports, entertainment, and news programs. With the exception of pay TV, broadcast media is free to access for all Australians and includes free-to-air (FTA) broadcast television, AM and FM broadcast radio, and community television and radio broadcasting targeted at specific groups or locations.

However, as Australians have gained access to faster, easier and more reliable ways to get connected, digital online media has become increasingly popular as a medium for sport, news and entertainment. With the NBN providing more Australians with access to high-speed internet connections, the majority of the population is able to stream video and audio services, often at the touch of a button. Australians have also embraced smart devices, enabling them to access content whether on the go or in their lounge room. In June 2021, more Australians accessed online video content than FTA TV (in the previous 7 days), with the popularity of podcasts and music streaming also soaring.

The increased popularity of podcasts, music streaming and video on-demand content services has increased competition for viewers and listeners. Audience numbers for both FTA TV and radio broadcasting have largely been in slow decline for years, with some advertisers diverting their marketing budgets toward the online sector. The economic uncertainty caused by the COVID-19 pandemic further challenged broadcasters, impacting revenue from advertising and disrupting established media consumption patterns such as sports schedules and the daily commute.

These changes have resulted in shifting strategies for traditional broadcasters, with a focus on cost reductions and hybrid distribution models using digital distribution methods to complement their terrestrial broadcast services and increase their reach.

This report uses industry data and primary consumer research to outline the key trends and developments in viewing and listening, encompassing the traditional broadcast environment, the range of digital offerings, and the ongoing shifts in content consumption. It also considers the drivers that underpin and shape the adoption of services.

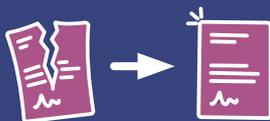
Viewing at a glance



More of us watched online subscription content than traditional free-to-air TV



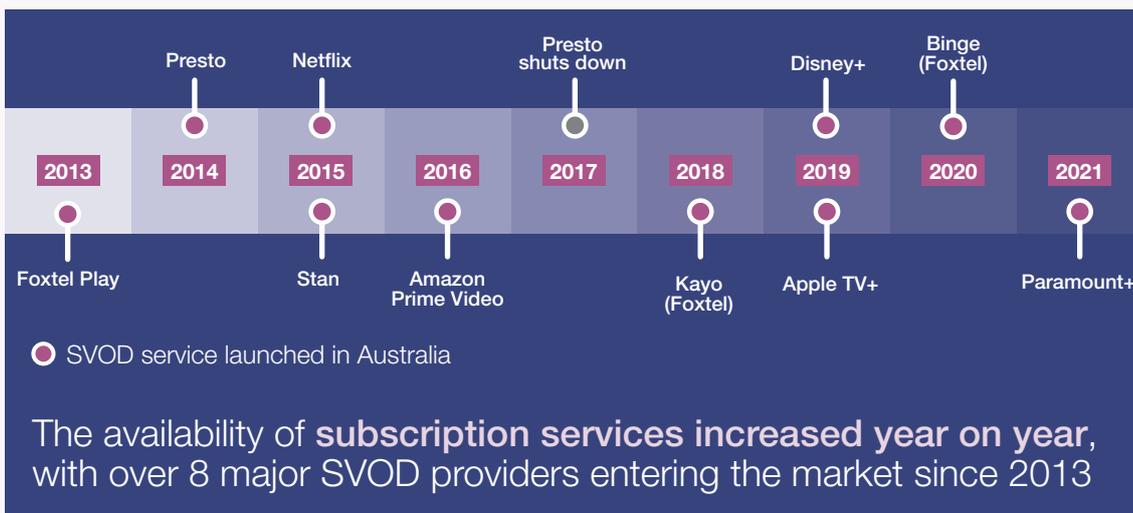
More of us used multiple online platforms to watch videos



27% have cancelled then re-joined a subscription video service (re-churning)



The average 'ideal' household budget for subscription video services was \$50 per month



Broadcasters are investing more in on-demand services to compete in the digital space



More of us used a smart TV to watch online video at home

Viewing

Australia continues to invest in and expand digital infrastructure. Ongoing infrastructure upgrades such as the completion of the NBN and the rollout of the latest 5G mobile networks, have seen internet speeds and reliability increase substantially over the past decade. This has allowed Australians improved access to on-demand video services and encouraged online content providers to enter the Australian market.

The COVID-19 pandemic has significantly accelerated the take-up of on-demand video platforms, particularly among those aged 45 and over, who have traditionally been slower to transition to new technology. Broadcasters have continued to develop hybrid business models using broadcast video-on-demand (BVOD) platforms commonly referred to as 'catch-up TV' services and, in some instances, either owning or partnering with subscription video-on-demand (SVOD) services.

New technologies, such as smart TVs, have also played a role by making it easier to access a variety of online services, including catch-up TV for FTA services and SVOD services such as Netflix.

The transition to online streaming

Free-to-air (FTA) broadcast television has long played an important role in informing and entertaining the Australian public and remains one of the most common ways to view audio-visual content. In June 2021, over half of Australian adults (54%) tuned in to FTA broadcast TV (live or recorded) in the previous week, with older people in particular remaining loyal FTA viewers (67% of those aged 45 and over).¹ Nonetheless, the last few years have been challenging for FTA broadcasters, with diminishing profitability and advertising revenue. Losses intensified through the onset of the COVID-19 pandemic in 2020 amid economic uncertainty.²

The rise of SVOD services, such as Netflix and other video platforms such as YouTube, has also weakened demand for FTA broadcast TV over recent years. The convenience of these services has been a driving factor of their popularity, combined with the large array of content on offer.³ The COVID-19 pandemic also accelerated the shift towards digital viewing, providing Australians with additional video content at a time when many were spending more time at home.

Common terms

Free-to-air (FTA) broadcasting

Broadcast television services where the signal is delivered without charge to the viewer. While traditionally accessed via a TV aerial, viewers can also access free-to-air through alternative sources, such as digital catch-up services and satellite TV.

Pay TV

Premium television services, such as Foxtel and Fetch TV. Traditionally provided through cable or satellite connections to users, newer pay TV services are more commonly provided over the internet for viewers.

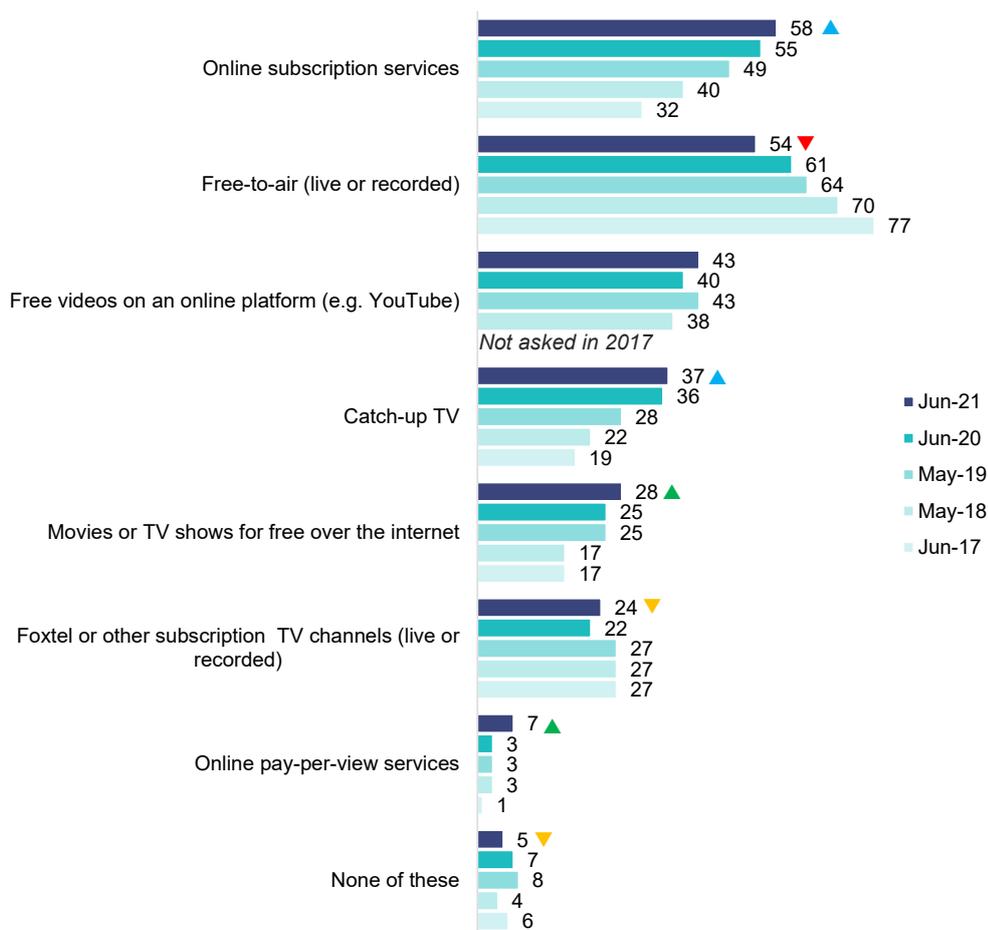
SVOD

Subscription video-on-demand. Refers to any online internet video services that charge a premium for unlimited on-demand content. Examples include Netflix, Stan, Disney+ and Amazon Prime Video.

BVOD

Broadcast video-on-demand. Refers to any online internet video services operated by free-to-air television broadcasters. Often referred to as 'catch-up TV' and includes both on-demand and live broadcast content. BVOD content is typically provided to the consumer free of charge, or in the case of commercial BVOD, with advertisements that must be watched in return for access to content.

Figure 1: Viewing behaviours (%)



▲ ▼ Significantly different to prior year at the 95% confidence level.

▲ ▼ Significantly different to 2 years prior at the 95% confidence level.

Note. Catch-up TV is a streaming service for free-to-air programs (e.g. ABC iView, 9Now or 7Plus).

Base: Australians aged 18 and over, 2017 (n=2,277), 2018 (n=2,106), 2019 (n=2,067), 2020 (n=2,009), 2021 (n=3,586).

See ACMA annual consumer survey questionnaire for full category names.

Source: ACMA annual consumer survey, QF4: Which of the following have you personally watched in the past 7 days at home or elsewhere?

The ACMA's annual consumer survey revealed that in June 2021, for the first time, Australians were more likely to have watched an online subscription service than live or recorded FTA TV in the previous 7 days. This shift toward online viewing is also evident in the growth of catch-up TV for FTA programs (Figure 1).

The rise of SVOD has also had a considerable impact on subscription broadcast television services or 'pay TV'. In recent years, the number of traditional pay TV subscribers has fallen, declining by over 700,000 since 2019.⁴

At June 2021, a quarter (24%) of Australian adults used a pay TV service such as Foxtel or Fetch TV in the previous 6 months, down from 27% in 2019 (Figure 1). As with FTA TV, the key driver of this drop has been the proliferation of SVOD services in Australia, which offer subscribers relatively easy access via their existing internet connection, without the need for additional hardware, and at a significantly lower price point.

In 2021, FTA broadcasters saw some recovery, with revenue growing by 9.6% from the previous year, to return to pre-pandemic levels (Figure 2). Key to this recovery was the resumption of regular sporting events, which attracted increased audiences and consequently, higher demand for advertising space.

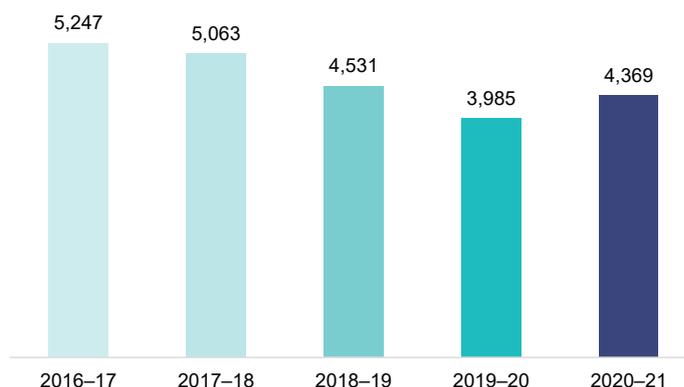
Broadcasters' response to the growth in SVOD

The largest threat to broadcast revenue has been the SVOD market, which has seen strong growth over the past several years. According to GlobalData, the Australian SVOD market grew nearly 50% in 2021, with total earnings exceeding \$2.4 billion* (Figure 3).

Increasing take-up of SVOD services has seen declines in FTA revenue from advertising, with marketing dollars shifting to digital channels. Nonetheless, FTA broadcasters still eclipse SVOD services for revenue, earning significantly more income than SVOD services.

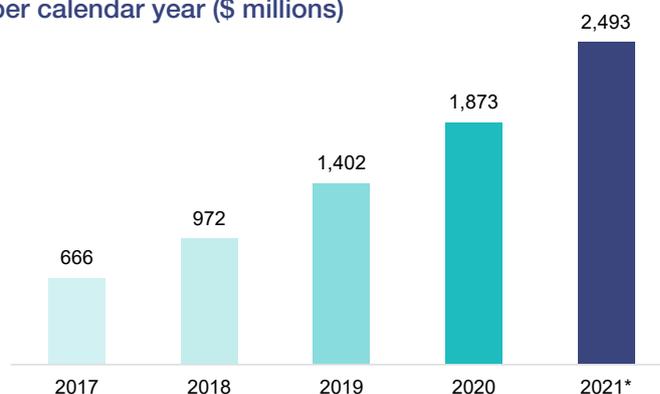
Broadcasters have responded to higher demand for on-demand content by providing access to catch-up TV, program back-catalogues and movies online through their own video on-demand (BVOD) services. Through a combination of simultaneously live-streaming content from their broadcasts, on-demand versions of previously broadcast content, and other content from their back catalogues, BVOD platforms have enabled broadcasters to compete in the digital space for both audience and advertising revenue.

Figure 2: Australian FTA broadcast revenue industry per financial year (\$ millions)



Note: Excludes BVOD and SVOD services.
Source: IBISWorld, J5621 Free-to-Air Television Broadcasting in Australia, June 2021.

Figure 3: Australian SVOD industry revenue per calendar year (\$ millions)



*Estimated revenue.
Source: GlobalData. Australia Subscription Video on Demand (SVOD) Forecast, 26 October 2021.

* This result may differ from other SVOD industry revenue estimates. Estimates can vary based on a variety of factors such as estimated number of paid subscribers, subscriber churn and distribution of basic vs premium packages for relevant SVOD services).

With a faster and more reliable broadband network and increased take-up of smart TVs, Australians have become increasingly comfortable using digital services, with more viewers streaming FTA content online. More Australian adults watched a catch-up TV streaming service for free-to-air programs in the previous week to June 2021 (37% up from 28% in 2019) than ever before. As shown in Figure 4, ABC iView was the most popular catch-up service, watched by almost 1 in 4 (23%) Australian adults, followed by SBS On Demand, watched by 1 in 6 (16%).

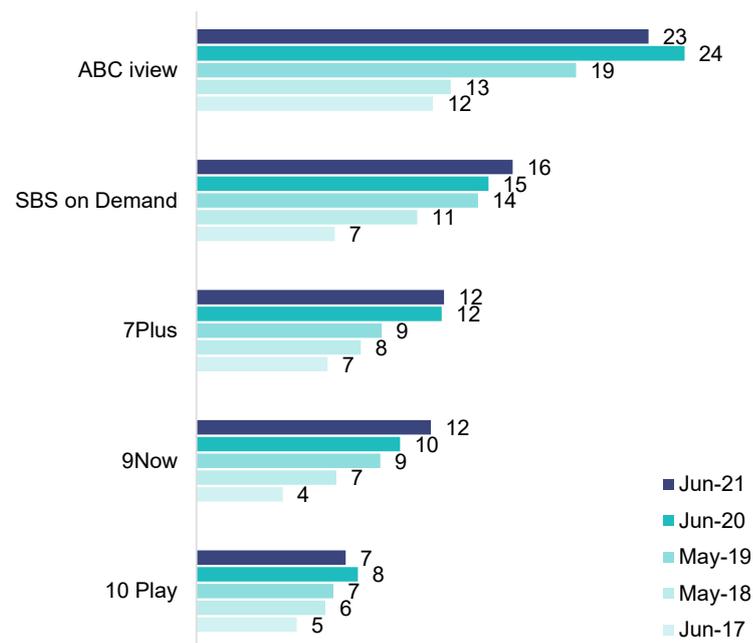
Although still a relatively small part of the total broadcast industry, earnings from BVOD have increased strongly, with a forecast annualised growth rate of 32.7% for 2019–25.⁵ In 2020, revenue from BVOD grew 38.8% on the prior year, reaching \$229 million.⁶

Visibility of BVOD viewing habits has also increased, with ratings data for BVOD programs now available to advertisers through OzTAM.⁷ Access to ratings data may boost advertising revenue for BVOD services further by giving more detailed information on the popularity of individual programs across BVOD services. Another advantage of BVOD services is the ability to curate ‘addressable’ advertising using data gathered from viewing habits. Channel 7⁸, Channel 9⁹ and Channel 10¹⁰ have all integrated systems that allow for addressable advertising on their BVOD services.

Broadcasters have also ventured into the SVOD market with some success. Nine Network’s Stan, first released in January 2015, earned over \$310 million in 2021, representing over 14% of total company revenue.¹¹ In 2021, Stan was the second largest SVOD provider in Australia, accounting for 14% of the total Australian SVOD market (Figure 5). Network Ten has also made inroads into the SVOD market through Paramount+, although it does not publicly disclose earnings associated with this service.

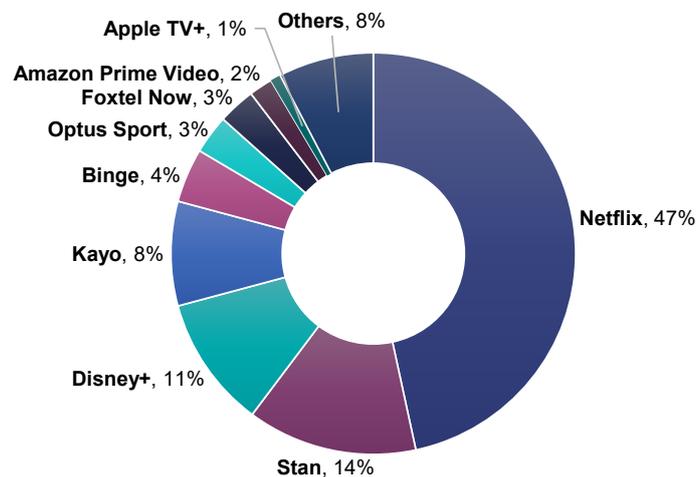
Seven West Media initially entered the SVOD market as part of a joint venture with Foxtel, when Presto was re-launched in January 2015. However, this service subsequently shut down in January 2017, with Seven West Media yet to create or partner with a new SVOD service, although the company has expressed interest in partnering with an external service if the opportunity arises.¹²

Figure 4: Catch-up TV services watched (%)



Note: Catch-up TV is a streaming service for free-to-air programs.
 Base: Australians aged 18 and over, 2017 (n=2,277), 2018 (n=2,106), 2019 (n=2,067), 2020 (n=2,009), 2021 (n=3,586).
 Source: ACMA annual consumer survey, F9: You said you watched catch-up TV for free-to-air programs in the past 7 days. Which channels have you watched using catch-up TV in the past 7 days?

Figure 5: Estimated Australian SVOD market share, by revenue, 2021



Note: ‘Other’ includes a range of smaller, niche SVOD services available in Australia, including HayU, Britbox, Kanopy, YouTube Premium, Acorn TV and many others. ‘Amazon Prime Video’ revenue is underrepresented due to its subscription also providing other non-SVOD services.
 Source: GlobalData. Australia Subscription Video on Demand (SVOD) Forecast, 26 October 2021.



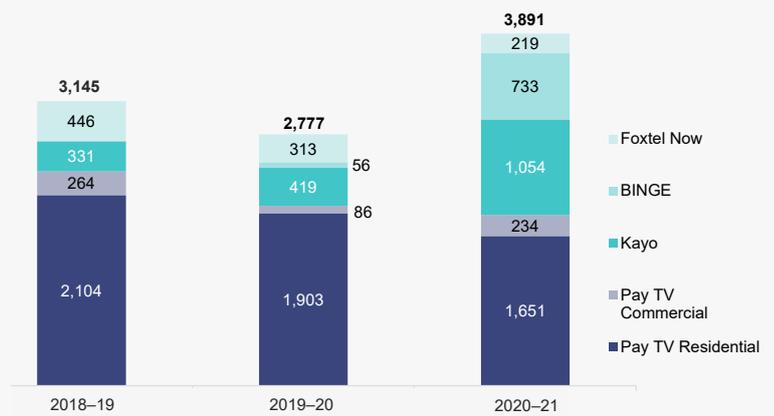
Spotlight: Foxtel's changing model

With the average SVOD subscription priced significantly lower than pay TV¹³, Foxtel was compelled to transform its business model to maintain its customer base and attract new subscribers.

While Foxtel has offered subscribers access to streaming content since 2013 through Foxtel Now (previously Foxtel Play)¹⁴, its shift into dedicated SVOD streaming channels has proven much more successful. The first of these new SVOD services was Kayo, a live sports streaming service, launched in November 2018.¹⁵ This was followed by Binge in May 2020¹⁶, and Flash, a news-based aggregation streaming service, in October 2021.¹⁷ By June 2021, Foxtel Now, Kayo and Binge had attracted over 2 million paid subscribers (Figure 6), eclipsing the total number of traditional residential and commercial Pay TV subscribers, and boosting Foxtel's total paid subscriber base to just under 3.9 million.¹⁸

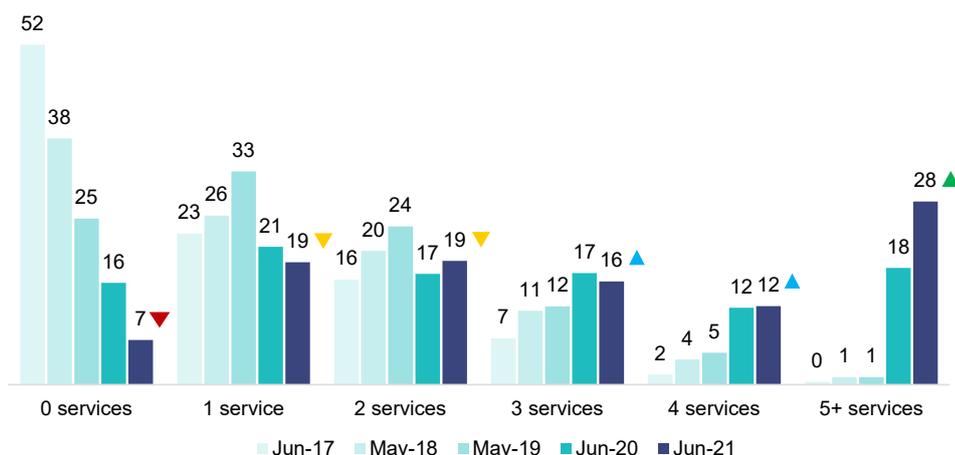
While the traditional-access pay TV services remain available for the time being, the shift toward SVOD-style services will continue to gather pace. The transition of the HFC network for use by the NBN means that cable TV will be phased out in Australia within a few years. By June 2023, Foxtel will only provide video content through satellite and subscription video-on-demand.¹⁹

Figure 6: Foxtel and subsidiaries paid subscribers, by platform (000s)



Note: Total paid subscribers shown above columns.
Source: NewsCorp 2021 Annual Report (Form 10-K) and 2019 Annual Report (Form 10-K).

Figure 7: Number of online platforms used to watch video content (%)



▲ ▼ Significantly different to prior year at the 95% confidence level.

▲ ▼ Significantly different to 2 years prior at the 95% confidence level.

Base: Australian adults 18 and over who accessed the internet in the past 6 months: 2017 (n=2,181), 2018 (n=2,014), 2019 (n=1,991), 2020 (n=1,984), 2021 (n=3,549). Note: Excludes 'Don't know' and 'Prefer not to say' responses.

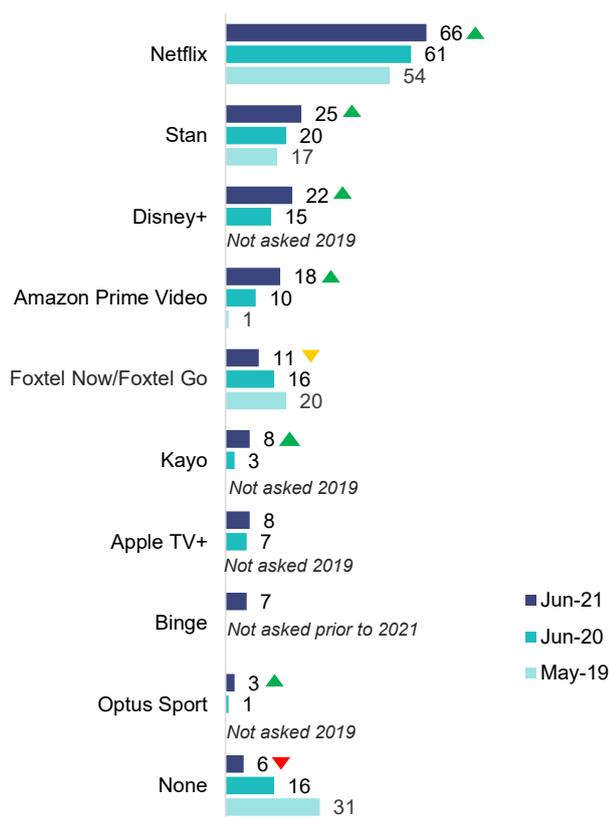
Source: ACMA annual consumer survey, QF7: Which of the following online services, if any, have you used to watch video content in the past 6 months?

Number of online video services used by Australians

Australians have been quick to take advantage of the influx of online video services into the market, with uptake of multiple services steadily increasing. We're now watching video content using a wide range of platforms, including subscription services such as Netflix and Binge, along with social media sites like Facebook and TikTok. More than a quarter of online adults (28%) watched 5 or more online services in the first half of 2021, up from just 1% in 2019 (Figure 7).

The reach of the 'big 4' SVOD services continues to climb. Nearly two-thirds (66%) of online video viewers in Australia reported watching Netflix in the previous 6 months to June 2021, with 1 in 4 (25%) watching Stan, and around 1 in 5 watching Disney+ (22%) or Amazon Prime Video (18%) (Figure 8).

Figure 8: Online subscription services used to watch video content (%)



▲ ▼ Significantly different to prior year at the 95% confidence level.

▲ ▼ Significantly different to 2 years prior at the 95% confidence level.

Note: Research does not include Paramount+, which launched in August 2021.

Base: Australians aged 18 and over, 2019 (n=2,067), 2020 (n=2,009), 2021 (n=3,586).

Source: ACMA annual consumer survey. F7: Which of the following online services, if any, have you used to watch video content in the past 6 months?



Spotlight: Too much of a good thing? Market saturation in SVOD

The number of SVOD services available to Australians has continued to increase over the years, and there are signs that the market is approaching saturation. The release of additional services has also thinned content of individual subscription services, reducing the inherent value of each service. Subscribing to every available SVOD service in Australia would cost in excess of \$100 per month, placing it beyond the budget of many. According to Deloitte, while the average Australian household is spending \$55 per month on entertainment subscriptions, their target spend on entertainment subscriptions is only \$50.²⁰

With more services available, consumers are becoming more selective with their choice of service by subscribing for a limited period to coincide with the availability of their favourite content, such as the football season or new

movie or series release. More than a quarter of Australians aged 14 and over (27%) reported 're-churning' (cancelling and re-joining a service).²¹ The ability for multiple users to access the same account has also caused a further saturation point. The increased number of services available has encouraged users to share cost, and potentially multiple services, between friends and family.

In this environment, traditional content owners (production studios) are now taking content back and launching their own SVOD services. The ensuing continued fragmentation of the market, at least in the short to intermediate term, is expected to drive new business models as SVOD providers seek to defray costs, find new and/or cheaper content and identify new revenue sources.²²

Smart technologies and the rise of SVOD

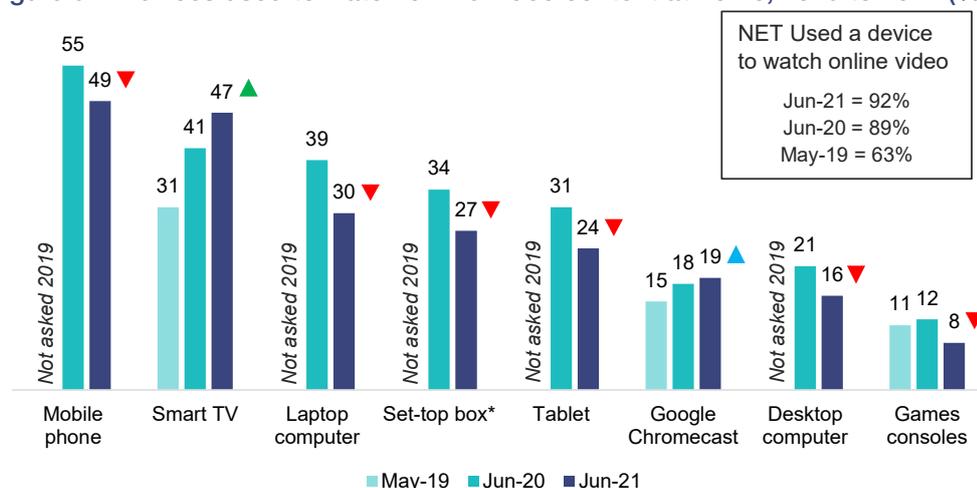
Increasing take-up of new technology has also facilitated the move towards online video content. Many Australians have embraced the functionality offered by smart TVs, with electronic program dashboards, onscreen apps and dedicated buttons on remote controls allowing easy access to online services over their broadband connection. As of June 2021, 7 in 10 (70%) Australian adults had a smart TV connected to the internet.²³

By contrast, while mobile phones remain the most popular way to watch online video content in Australia, use of mobiles for this purpose fell in the 12 months to June 2021 (49% in 2021, down from 55% in 2020) (Figure 9).

Fast fact: Audio and captioning

A 2019 US survey found that 92% of viewers watch videos on mobile phones without sound. Further, 80% of consumers are more likely to watch an entire video when captions are available.²⁴

Figure 9: Devices used to watch online video content at home, 2019 to 2021 (%)



▲ ▼ Significantly different to prior year at the 95% confidence level.

▲ ▼ Significantly different to 2 years prior at the 95% confidence level.

*'Set-top box' includes Apple TV, Foxtel box, Fetch TV box.

Base: Australians aged 18 and over, 2019 (n=2,067), 2020 (n=2,009), 2021 (n=3,586).

Source: ACMA annual consumer survey, QF1: Which of the following devices, if any, do you use to watch online video content such as TV shows, movies, sport or user-generated content, at home?

The surge in the take-up of smart TVs has been met with some concern from FTA broadcasters, who speculate that the layout of smart TV dashboards and remotes may be lowering the prominence of FTA content²⁵, and in turn, audience numbers. Content services, particularly SVOD and BVOD such as iView and Netflix, have been given front-and-centre access on some smart TV remotes, dashboards and menus. Free TV has suggested that as a result, FTA broadcasting services are increasingly difficult for audiences to find on smart TVs, and this will continue to be an issue as device manufacturers seek to monetise the prominence of services on their devices.²⁶

Content

Content production and licensing are important elements in the broadcast value chain. Broadcasters invest in a variety of content, including events such as sport and television programs ranging from comedy and drama to light entertainment.

There are notable disparities in expenditure on content between FTA broadcasters and international SVOD providers. FTA TV broadcasters spent around \$1.8 billion on broadcast content, including original productions, sports and licensed content in 2019–20.²⁷ In comparison, Netflix spent over US\$15 billion (A\$22 billion) on its global content collection in 2020.²⁸

Unlike SVOD broadcasters, FTA broadcasters are subject to Australian content regulations, which mean they are required to broadcast a minimum amount of Australian content on their services annually. In this context, broadcasters significantly outspend the major SVOD providers (Netflix, Stan, Amazon Prime Video and Disney+) on Australian content. In 2019–20, for instance, FTA broadcasters spent nearly \$1.5 billion on Australian content²⁹, while the major SVOD providers collectively spent just \$153 million in the same period.³⁰

The cost of producing Australian scripted content versus importing international content varies, however networks can often purchase high-quality international programming at a lower cost than would be required to produce an Australian-equivalent.³¹ Given the increasing availability of high-quality scripted content from SVOD providers, FTA broadcasters have increasingly shifted towards programs such as sports, news and reality TV to capture audience share.³²

Reality TV

The reality television genre can be described as non-scripted programs that depict actual, contemporary events, people or situations with a heavy emphasis on dramatic impact or entertainment value.

Over the past several years, reality TV has become a staple of television programming in Australia. Routinely topping entertainment television ratings, these programs attract sizeable numbers of viewers and generate strong advertising revenue for commercial networks. ACMA's 2021 report *Viewer response to reality television in Australia*³³ highlights that over three-quarters (76%) of Australians have watched some form of relationship-based reality television program at some stage.³⁴



Spotlight: The digital divide in media consumption

Despite an increase in the quantity of digital content available to consumers, there is a portion of the population without a fixed internet connection at home. While most Australians had a home internet connection in June 2021 (91%)³⁵, there remains nearly 1 in 10 Australians who may be unable to reliably stream digital content. Although the NBN has assisted in bridging this gap, viewer experience can vary significantly based on the quality of the connection.

One of the key features of radio and TV broadcasts is ease of access, unlike digital content, which may be attached to a subscription service. Broadcast content (excluding pay TV) is freely available to all Australians with access to either a radio or television aerial. Digital content, whether free or paid, incurs ongoing costs in the form of internet access, which is unavoidable. Broadcast content is vital in providing both news and entertainment to Australians who either cannot access reliable internet or cannot afford it.

Despite reality TV's popularity, there is public concern around the potential social harms associated with these programs. In 2021, the ACMA received an increase in the number of complaints surrounding Channel Nine's *Married at First Sight* (MAFS).³⁶ This prompted an investigation of 3 episodes that may not have complied with requirements under the Commercial Television Industry Code of Practice.³⁷ The investigation found no breach of the Code and the content fell within the respective classifications. However, the Code does not cover aspects such as perceived treatment of contestants, which was the focus of some viewer complaints.

Sports and major events

Sports and major events are a significant drawcard for both FTA and pay TV services. Significant sums of money are often spent on exclusive broadcast contracts for sport codes. For example, Nine Entertainment committed to a \$300 million contract for the 5-year broadcast rights to the Australian Open and associated lead-up tournaments between 2020–24. This was brought forward one year at an additional cost of \$48.5 million.³⁸

However, this was dwarfed by a 6-year broadcast deal made jointly by Seven West Media and Foxtel with Cricket Australia for exclusive rights to broadcast or stream all associated matches, with the 2 broadcasters collectively paying \$1.2 billion for the deal.³⁹ While Seven West Media holds the rights to FTA broadcast, Foxtel has created a 24/7 dedicated cricket channel available to its pay TV subscribers and via Kayo. From early 2022, Foxtel is also making selected sports content available to non-paying Kayo users under a 'freemium' arrangement aimed at increasing audience share.⁴⁰

Streaming services have also begun investing in sporting events, with nearly half of Australian content hours reported by the 'big 4' SVOD providers (Netflix, Amazon, Disney+ and Stan) in 2020–21 directed at sporting events.⁴¹ This figure excludes investments made by Foxtel's Kayo and Optus sports. However, unlike FTA broadcasters, SVOD providers are currently limited in their expansion into Australian sports coverage due to the 'anti-siphoning list scheme.'



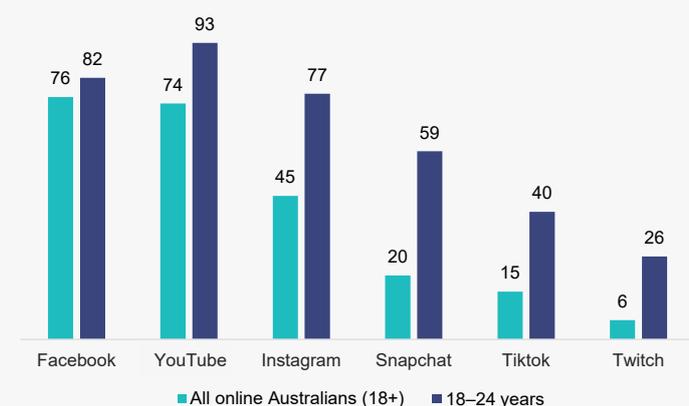
Spotlight: User-generated video content

The rise of digital platforms, particularly social media, has changed the way that Australians interact with media. Accessing and viewing social media, apps and websites is now common, with nearly all (96%) online Australians accessing social media in some form in June 2021.⁴² These platforms have enabled a surge in user-generated video content, with platforms such as YouTube, TikTok and to a lesser degree, more niche platforms such as Twitch providing a cheap and effective way for content creators to reach a wide array of audiences. This type of content can vary significantly, from posting pictures or comments on platforms such as Facebook or Instagram, to creating both short- and long-form video content for platforms such as TikTok and YouTube.

User-generated content is a significant rival for both traditional broadcast and SVOD services, with nearly three-quarters of online Australians (74%) watching YouTube in the 6 months to June 2021.

This was even higher among younger Australian adults, with over 9 in 10 (93%) of online Australians aged 18–24 watching YouTube in the 6 months to June 2021 (see Figure 10).

Figure 10: Social media websites used most often, by age, June 2021 (%)



Base: Australians aged 18 and over who used the internet in the past 6 months, All Australians: (n=3,549), 18–24 (n=151).

Source: ACMA annual consumer survey, E2. Which websites or apps have you used in the past 6 months for personal purposes? E3. And which social media website or app do you use most often?

Listening at a glance

In the previous 7 days
to June 2021:



77% of us listened to radio



64% of us
listened to
FM radio



25% of us
listened to
AM radio



14% of us
listened to
digital radio



10% of us
listened to radio
on the internet
or an app



91% of us
had a radio in our car



Only 52% of us
had a radio in our home

67% of us
streamed
music



63% listened
to Spotify, the
most used
service



We accessed over 540 million podcasts
in 2021

Listening

As with viewing, audiences are increasingly embracing online audio options. While most Australians continue to tune into radio, audio is an increasingly competitive market with podcasts and music streaming services attracting millions of weekly listeners. This, along with the uncertain economic environment associated with the COVID-19 pandemic, has resulted in declining revenue for radio broadcasters.

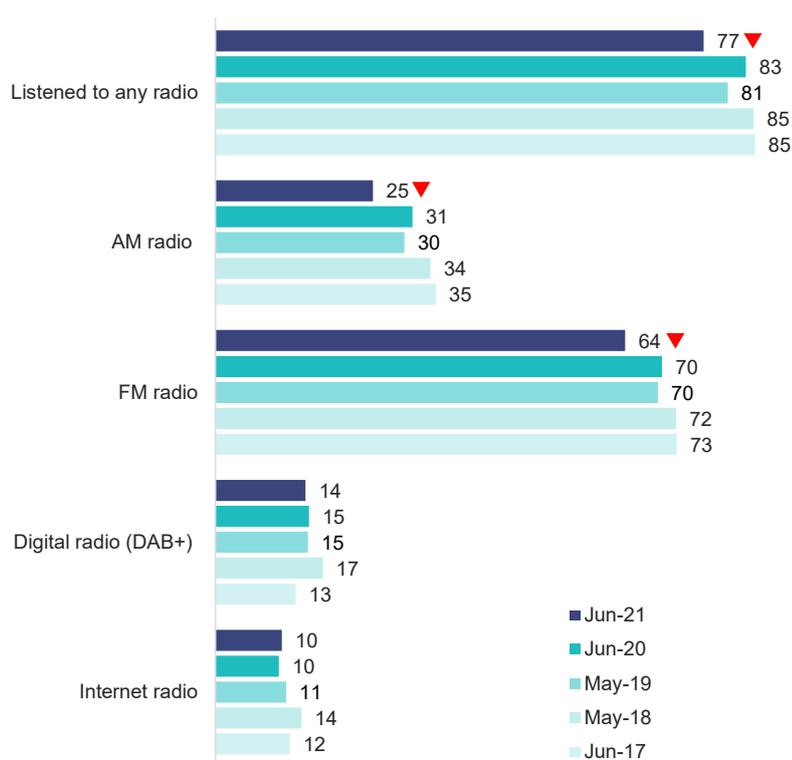
Many of Australia's commercial, public and community radio broadcasters have responded to this trend by providing web-based content, such as catch-up or on-demand archives of broadcasts and podcasts, in addition to their scheduled programming.

Radio remains a key service

Broadcast radio has been publicly available in Australia for almost 100 years.⁴³ Although the rise of TV and introduction of new audio and digital devices has reduced the popularity and role of broadcast radio in Australia, many Australians still tune in, and radio remains a dominant aspect of Australia's media landscape. In June 2021, over three-quarters of Australian adults (77%) reported that they had listened to radio in the previous 7 days, including almost 9 in 10 (88%) of those aged 45 and over.

Nonetheless, the number of Australians listening to broadcast radio is declining, albeit at a slower rate than FTA broadcast television. While listening to digital radio (DAB+) and online radio remains steady, AM and FM radio have both seen recent falls in listenership (Figure 11).

Figure 11: Radio listenership in the past 7 days, June 2021 (%)



▼ Significantly different to prior year at the 95% confidence level.

* DAB+ radio is available in metropolitan areas of Australia only, with the exception of Mandurah in Western Australia. Digital radio asked of capital city respondents only.

Base: Australians aged 18 and over, 2017 (n=2,277), 2018 (n=2,106), 2019 (n=2,067), 2020 (n=2,009), 2021 (n=3,586).

Source: ACMA annual consumer survey. QH3: Which of the following have you listened to in the past 7 days?



Spotlight: AM radio as an emergency information channel

During an emergency, the public has a vital need for up-to-date information to make informed safety decisions. AM radio broadcasts perform a crucial service in maintaining the flow of live information to affected communities, with state governments appointing official emergency broadcasters, typically ABC local radio, for this purpose.

While websites, social media, and targeted mobile apps and messages also form part of Australia's emergency warning system, AM radio's extensive coverage through its transmission networks has ensured it has continued to play a key role in disaster communications.

The Bushfire Royal Commission into the catastrophic 2019–20 bushfires found that in some areas during the main crisis period, ABC and community radio were the only ways to access timely information when digital services and telecommunications infrastructure failed.⁴⁴

Independent research commissioned by the ABC shows the national broadcaster plays an important role in the recovery of fire-affected communities, providing information to residents about available assistance.⁴⁵



Spotlight: Community radio in Australia

In addition to the well-known commercial and national radio broadcasters, Australia has a large community broadcasting sector, with over 450 licensed community radio stations operating on a not-for-profit basis. Each week, approximately 6 million Australians listen to community radio stations, many living in remote or culturally and linguistically diverse communities.

For many Australians, community radio is the only source of news and information available in their region, language or cultural group, and therefore provides a vital role in reaching diverse and isolated population groups.

Digital audio broadcasting (DAB+)

Radio content is made available on both analog and digital (DAB+) networks. FM radio remains the most popular form of broadcast radio, listened to by 64% of adults, followed by AM radio, at a quarter of listeners (25%) in the previous 7 days in June 2021 (Figure 11).⁴⁶ A relative newcomer to the radio network, DAB+ ownership is increasing in popularity, primarily driven by its installation as standard in many new cars. At June 2021, 37% of adult radio owners had a DAB+ digital radio in their car, up from 30% in 2019.⁴⁷

Launched in Australia in 2009, DAB+ operates in Australia at a higher frequency than AM or FM radio, with coverage available to 64% of the Australian population, mostly in capital cities.⁴⁸ The higher frequencies in which DAB+ operates allow for a greater variety of stations and work extremely well within coverage areas but, unlike AM/FM radio, quickly drop off at reception boundaries. DAB+ radio remains a complementary service to analog AM/FM radio, and due to Australia's size and the comparatively limited broadcasting range of digital transmitters, is unlikely to be rolled out nationwide.⁴⁹

For those within the coverage area, DAB+ offers a range of benefits, including enhanced sound quality, on-screen information and greater station choice. In 2021, 391 DAB+ services were available, with the majority of AM, FM and community radio stations simulcasting content over DAB+.⁵⁰ There were also dozens of DAB+-only stations offering listeners a range of content, including niche formats.⁵¹

Fast fact: Supermarket radio

Among the highest-rating DAB+-only stations in Australia is Coles Radio, with over 274,000 listeners across Australia's 5 largest cities in mid-2021.⁵² An instore radio station for Coles supermarkets, it plays music and promotions that change according to the time of day and demographic profile of its customers.⁵³

In the 7 days to June 2021, DAB+ was listened to by 14% of Australian adults and 19% of adults living in metropolitan areas.⁵⁴ DAB+ is quickly becoming a standard feature in new car sales. Over 4.4 million vehicles have been sold with factory-fitted DAB+ in the 10 years since 2011.⁵⁵ The ongoing replacement of non-digital receivers and the retirement of older cars with non-digital receivers will likely drive market share.

Narrowcasting in Australia

Narrowcasting radio services are a broadcasting category with a limited reception, targeted to special interest groups, at specific events or across specific locations. The narrowcast radio sector is an important part of broadcasting in Australia, with more than 2,000 low power open narrowcast licenses (LPONs) and 300 high power open narrowcast services (HPONs) in operation.⁵⁶

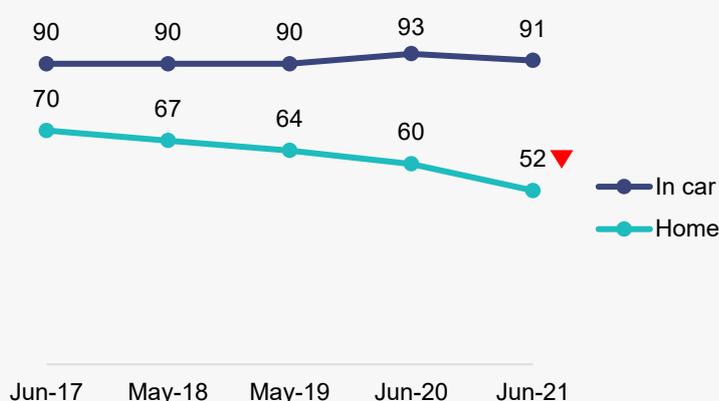


Spotlight: Car radios drive listenership

Car radios play an important role in driving radio listenership. In 2021, more than 9 in 10 Australian adults (91%) reported having a radio in their car (Figure 12). By contrast, home radio ownership has fallen, with just over half (52%) of Australians owning a radio at home in 2021, compared to 7 in 10 in 2017. Industry research indicates that broadcast radio dominated in-car entertainment in 2021, with 84% of adult drivers or passengers in a car in the last month having listened to AM/FM/DAB+ radio, more than double the rate of CD player or audio streaming services (both 39%).⁵⁷

Most (9 in 10) new car buyers in Australia believe broadcast radio should be standard in every vehicle.⁵⁸

Figure 12: Radio ownership in Australia, in car and at home (%)



▼ Significantly different to prior year at the 95% confidence level.

Base: Australians aged 18 and over, 2017 (n=2,277), 2018 (n=2,106), 2019 (n=2,067), 2020 (n=2,009), 2021 (n=3,536).

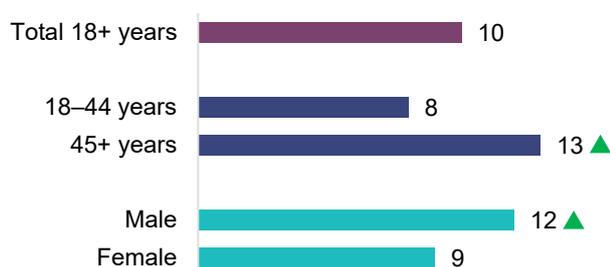
Source: ACMA annual consumer survey. QH1: Do you have a radio in your car? Do you have a radio at home?

Internet radio

Australians can now access hundreds of free live-streaming internet radio stations from Australia, many of which have content simulcast by traditional radio broadcasters.⁵⁹ While internet radio usage is still comparatively low in Australia, Commercial Radio Australia has recognised the growing shift toward multiplatform radio consumption with the launch of Radio360 in early 2022. A hybrid internet radio ratings system, Radio360 uses wearable devices (and initially, traditional paper diaries) to track terrestrial, DAB+ and internet radio ratings across Australia.⁶⁰

ACMA research indicates that in June 2021, 1 in 10 (10%) Australian adults listened to internet radio in the previous 7 days, a figure that has remained largely unchanged since 2017 (12%). Figure 13 shows that among those more likely to listen to internet radio were those aged 45 and over (13%), and those who identified as male (12%).

Figure 13: Listened to internet radio (%)



▲ Significantly different to the other sub-group at the 95% confidence level.

Base: Australians aged 18 and over (n=3,586), 18-44 years (n=1,118), 45 years and over (n=2,259), male (n=1,482), female (n=1,887).

Source: ACMA annual consumer survey. QH3: Which of the following have you listened to in the past 7 days?

The shift towards anytime access

While radio continues to attract large audiences, increasing numbers of Australians are seeing the appeal of anytime access to audio content through streaming services and podcasts. With rising consumer demand for such services, many of Australia's radio broadcasters are making content available online. This includes providing catch-up programming and podcasts on their own websites, along with other streaming services such as Spotify, YouTube Music and Apple Music.

Music streaming

The use of music streaming services is soaring across the globe, generating US\$13.4 billion worldwide in 2020 alone.⁶¹ Revenue from music streaming services in Australia is expected to exceed US\$610 million in 2022 and is forecast to grow 6.7% annually.⁶²

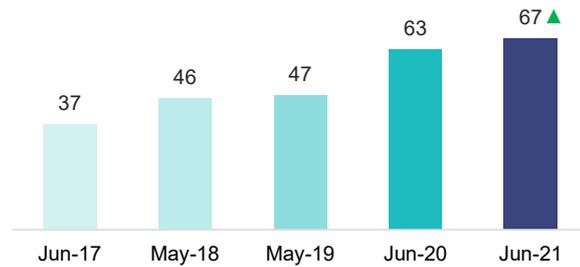
Fast fact: Music streaming

In the first half of 2021, music streaming accounted for 84% of all music industry revenue in the world's largest audio market, the United States.⁶³

In June 2021, two-thirds (67%) of Australian adults reported that they had listened to a music streaming service in the previous 7 days, a marked increase from 47% in 2019 (Figure 14).⁶⁴ While younger Australians (aged 18 to 44) lead the use of music streaming services (85%, compared to 51% for those aged 45 and over), use by older Australians (aged 45 and over) has more than tripled since 2017 (16%).

Spotify remains the leading digital music streaming service in Australia, used by 63% of adults who streamed music in the previous 7 days to June 21, up from 54% in 2017.⁶⁵ Listenership of Spotify dwarfs that of its competitors, with less than half the proportion streaming YouTube Music (30%) and Apple Music (12%) in June 2021.⁶⁶

Figure 14: Listened to streamed music content online (%)



▲ Significantly different to prior years at the 95% confidence level.

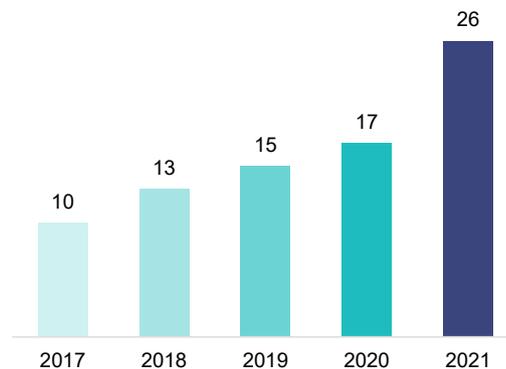
Base: Australians aged 18 and over, 2021 (n=3,586).

Source: ACMA annual consumer survey, QH3: Which of the following have you listened to in the past 7 days?

Podcasts

Since first emerging as a niche, low-cost form of audio entertainment in 2004, podcasts have taken off worldwide, with over 2 million shows online, and over 48 million episodes as of April 2021.⁶⁷ The take-up of podcasts has also accelerated rapidly in the past 5 years, with a quarter (26%) of Australians aged 12 years and over listening weekly, an increase from 1 in 10 (10%) in 2017 (Figure 15).⁶⁸ During 2021, 543 million podcasts were downloaded in Australia⁶⁹, across a wide range of genres including comedy, true crime and storytelling. ACMA consumer research revealed that adult podcast listeners were most likely to be aged 18 to 44 (23%) and were nearly twice as likely to have listened to at least one podcast in the previous week at June 2021, than those aged 45 and over (12%).

Figure 15: Weekly podcast listening among Australians aged 12 and over (%)



Source: Edison Research, The Infinite Dial 2021 Australia.

The podcast industry has seen considerable change in recent years. As listenership has grown, so has recognition of the commercial opportunities associated with podcasts, attracting larger players into the market. This has resulted in increasing consolidation within the sector, as individual podcasters are purchased by podcast companies – which themselves are subject to takeovers by podcast aggregators, such as Spotify.⁷⁰

Spotify continues to increase its catalogue of podcasts. The number of podcasts available on Spotify grew from 450,000 in 2019 to 1.5 million in 2020⁷¹, while its ‘Your Daily Drive’ service

coupled podcast clips with their listeners’ existing music library. In 2020, Spotify also launched the ‘music, meet podcasts’ campaign with the aim of re-positioning itself as an audio content provider as well as a music streaming service.

Growth in the take-up of podcasts has also seen broadcast radio invest in podcasting. Many broadcasters have moved into the podcasting space, including LiSTENR (Southern Cross Austereo), ARN/iHeart Podcast Network Australia, and Nova Entertainment, which now publish some of the most popular podcasts in Australia.

Spotlight: Which podcasts are Australians listening to?

According to industry research, in 2021 comedy was the most popular podcast genre in Australia with 118 million downloads, followed by news (92 million) and true crime (74 million). Casefile was the most listened to podcast, at 22.3 million downloads, followed by Stuff You Should Know (18.5 million) and Hamish and Andy (18.4 million) (see Table 1).⁷²

Table 1: Top podcasts in Australia during 2021

Ranking	Podcast	Downloads 2021 (millions)
1	Casefile	22.3
2	Stuff you should know	18.5
3	Hamish and Andy	18.4
4	The Kyle and Jackie O Show	16.7
5	Life Uncut	11.6

Source: Radio Alive, *Australian Podcast Ranker, 2021 Year in Review*.

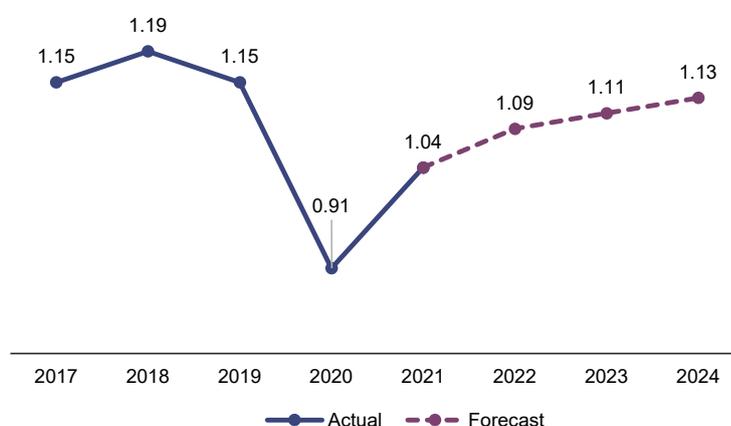
Financial impacts

The increasing popularity of apps and streaming services for audio content, together with the uncertain economic environment brought about by the COVID-19 pandemic, have resulted in a decline in radio broadcasting revenue in recent years. In the 12 months to June 2021, Australian broadcast radio industry revenue was \$1.36 billion, a 3.8% decline year on year.⁷³

Advertising industry data indicates that the cause of this decline was most likely 2-fold – a pandemic-induced drop in advertising spend in 2020, along with a longer-term shift of advertising dollars toward digital media.⁷⁴ This has largely been due to competition from podcasting and digital audio platforms, which have continued to significantly affect revenue and industry profit margins. Spotify is the only digital platform that provides a free advertising revenue-sponsored service, and so continues to be the single largest competitor of these platforms for live radio revenues. Data from Australia’s Standard Media Index indicates that the proportion of ad spend going to digital media grew by 3.2 percentage points from 2020.⁷⁵

However, the post-pandemic economic recovery is predicted to boost broadcast radio advertising earnings, with revenue forecast to exceed \$1.1 billion by 2024 (Figure 16).

Figure 16: Australian broadcast radio advertising revenue (\$ billions)



Source: S&P Capital IQ Pro, *Global advertising forecasts: Country ad spend, 23 December 2021*.

Glossary

addressable advertising

Addressable advertising is advertising designed for specific individuals or key markets, compared to standard advertising that targets the broader population.

BVOD: broadcast video on demand

Broadcast quality, long-form content that is consumed at the viewer's discretion after or before it airs or is released on broadcast television. BVOD content is offered on a broadcaster's content catch-up services across devices including smart TVs, set-top boxes, OTT devices, mobile apps, browsers and gaming consoles.

catch-up TV

Internet service typically provided on FTA and subscription broadcasters' websites that enables users to watch a recent episode of a TV program over the internet for a limited period. Examples include ABC iView, 10 Play or 7Plus for FTA programs.

DAB/DAB+ digital radio

A digital radio broadcasting standard. Like AM/FM radio, digital radio is broadcast free-to-air but uses a digital signal requiring a DAB+ digital radio-enabled device.

FTA TV: free-to-air television

Broadcast television services where the signal is delivered without charge to the viewer. Examples include channels 7, 9, 10, ABC, SBS, 9Go! and 7Mate.

linear TV

A traditional model of TV viewing delivered through cable, satellite or a TV antenna, where content is watched when it airs on its original channel at a specific time as scheduled by the broadcaster.

pay TV

Service providing access, for a fee, to television channels transmitted using cable, satellite or terrestrial microwave. In Australia, the primary pay TV provider is Foxtel.

podcast

Digital audio content files made available for download or streaming via the internet.

smart TV

A TV set that connects directly to the internet and doesn't need a computer, set-top box or games console to go online.

social media

A broad category of communications media that enables social interaction among groups of people, whether or not they are known to each other.

subscription TV

Service providing access, for a fee, to television channels transmitted using cable, satellite or terrestrial microwave. Examples include Fetch TV and Foxtel.

SVOD: subscription video on demand

An internet service that gives users unlimited access to a range of online video content at any time, for a flat monthly fee. Users can start and stop the program they are watching when they choose.

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