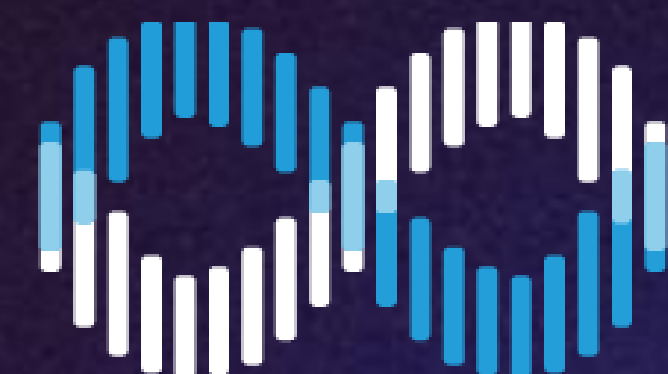




THE INFINITE DIAL[®] NZ 2025



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MEDIA AND
ENTERTAINMENT

RBA RADIO BROADCASTERS ASSOCIATION

Study Overview

- The Infinite Dial is the longest-running survey of digital media consumer behavior in America
- The Infinite Dial New Zealand report mirrors the Infinite Dial U.S. reports, which have been undertaken annually since 1998 by Edison Research, and cover a wide range of online digital media topics
- This is the third Infinite Dial New Zealand report since 2022 that explores the penetration of online digital audio in New Zealand, as well as the online platforms and technologies used
- This study is designed to allow for direct comparisons between New Zealand, U.S., and UK

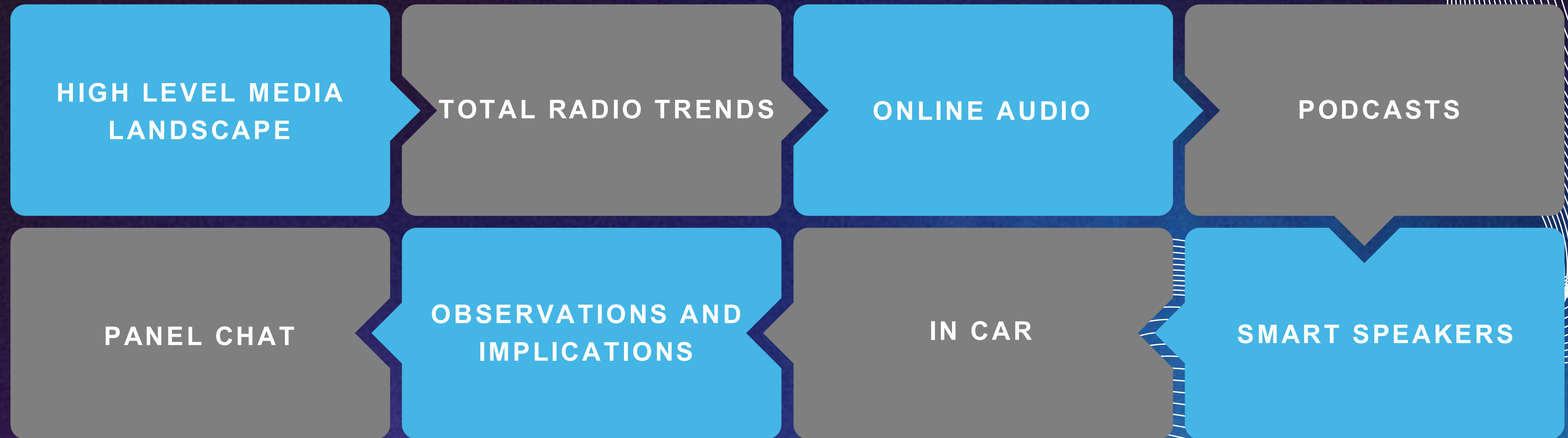


Study Methodology

- In March 2025, Edison Research conducted a national survey of 1,007 people aged 16 and older
 - N=295 telephone surveys
 - N=712 online surveys
- Data weighted to national 16+ population figures



Today's Agenda



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Total Audio Landscape



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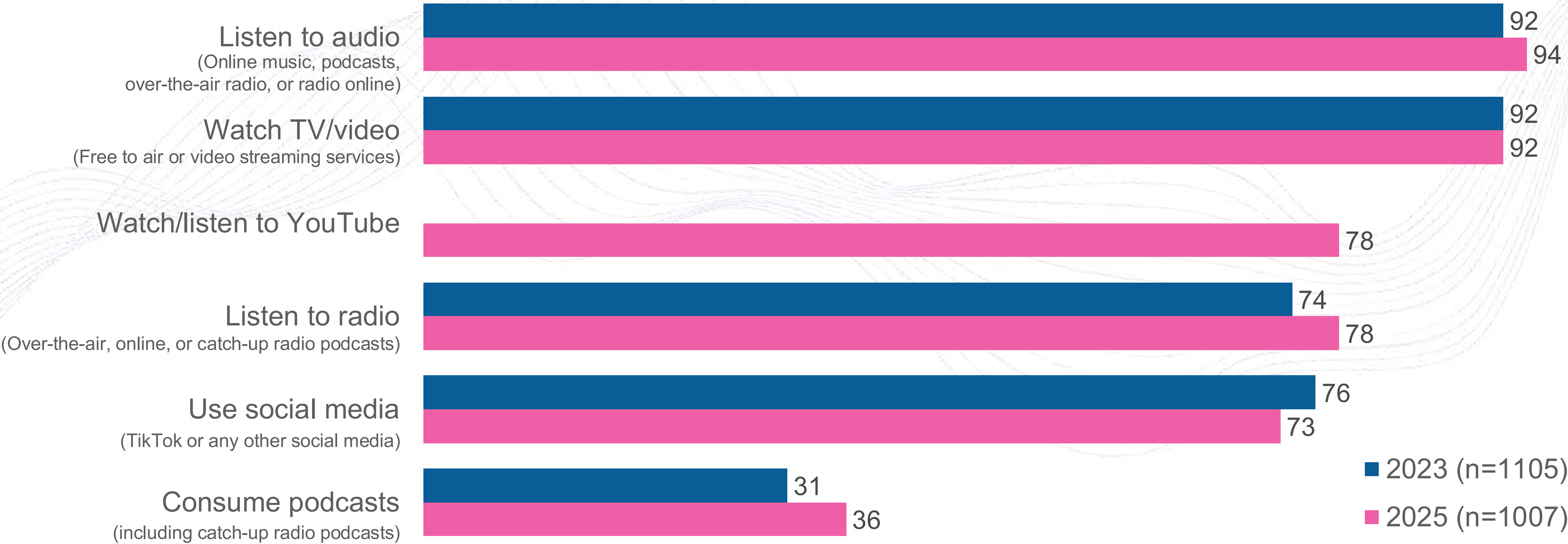
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In 2025, Audio now leads consumption for Kiwis

Weekly Media Consumption

TOTAL NEW ZEALAND POPULATION 16+

% DOING ACTIVITY IN THE LAST WEEK

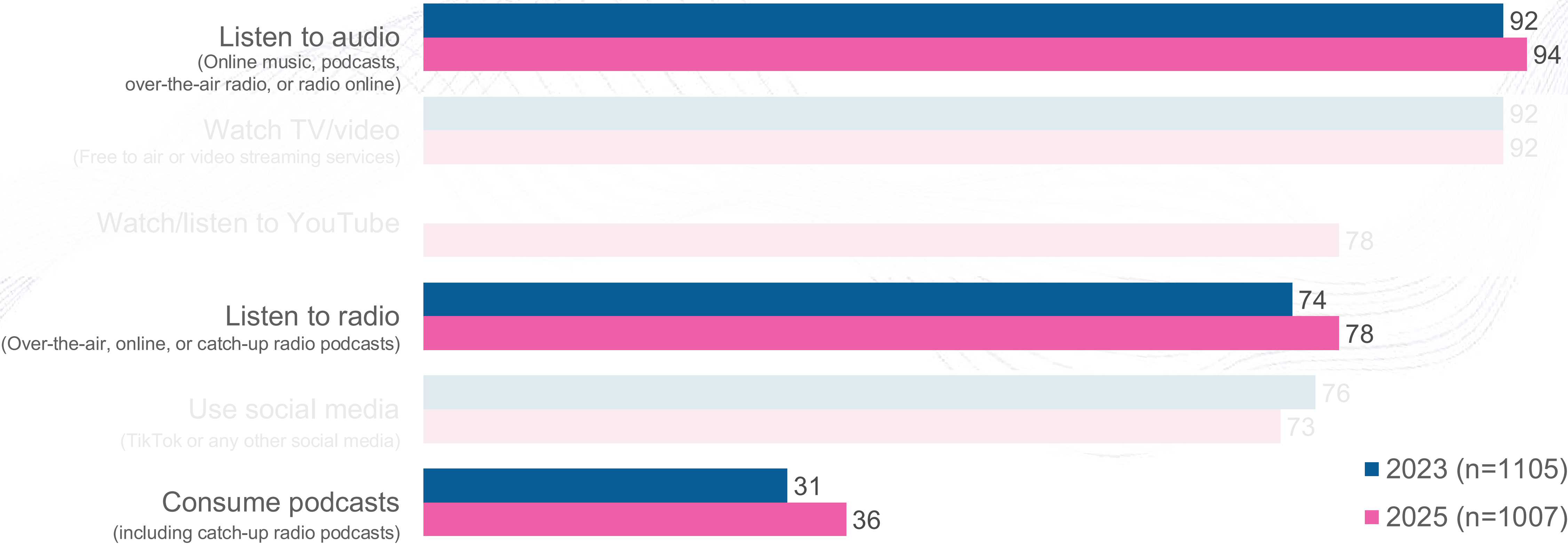


Driven by Radio's resilience and burgeoning podcast consumption

Weekly Media Consumption

TOTAL NEW ZEALAND POPULATION 16+

% DOING ACTIVITY IN THE LAST WEEK

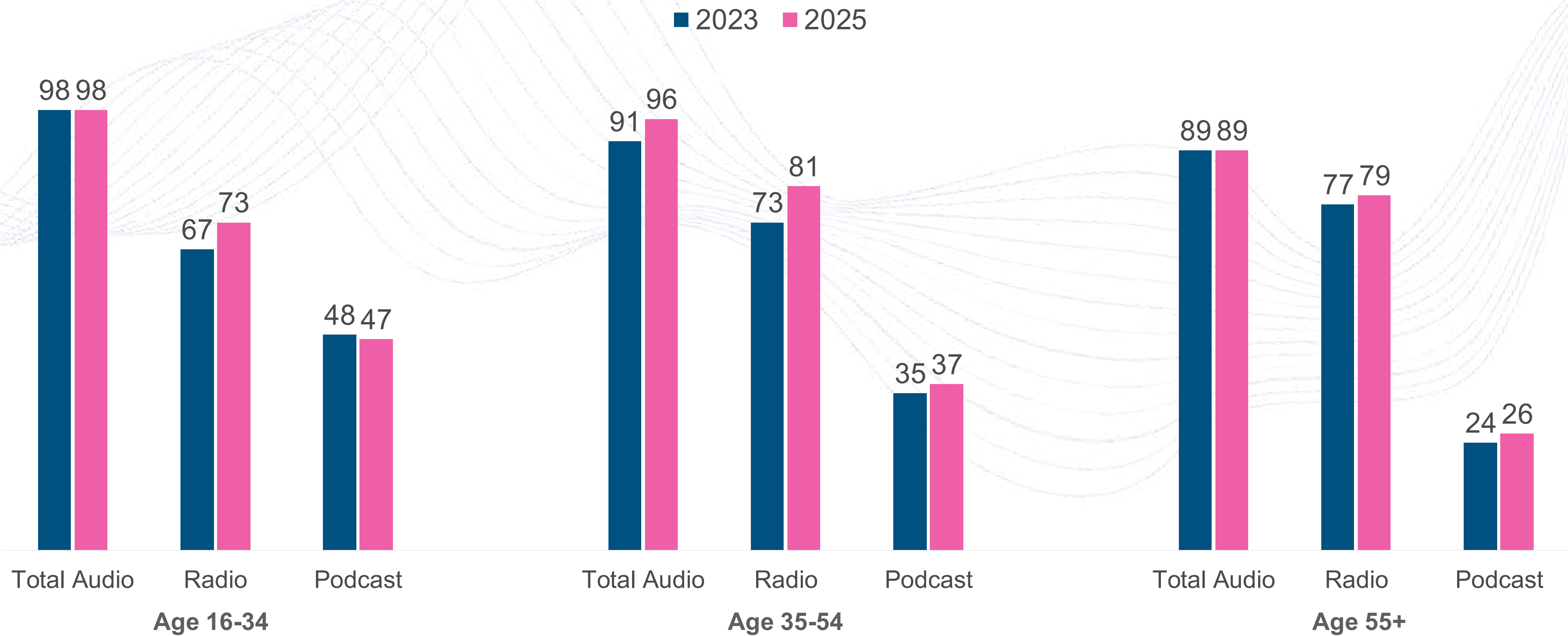


Growth in consumption driven by 35-54

Weekly Media Consumption

TOTAL NEW ZEALAND POPULATION 16+

% DOING ACTIVITY IN THE LAST WEEK



Total Radio Trends

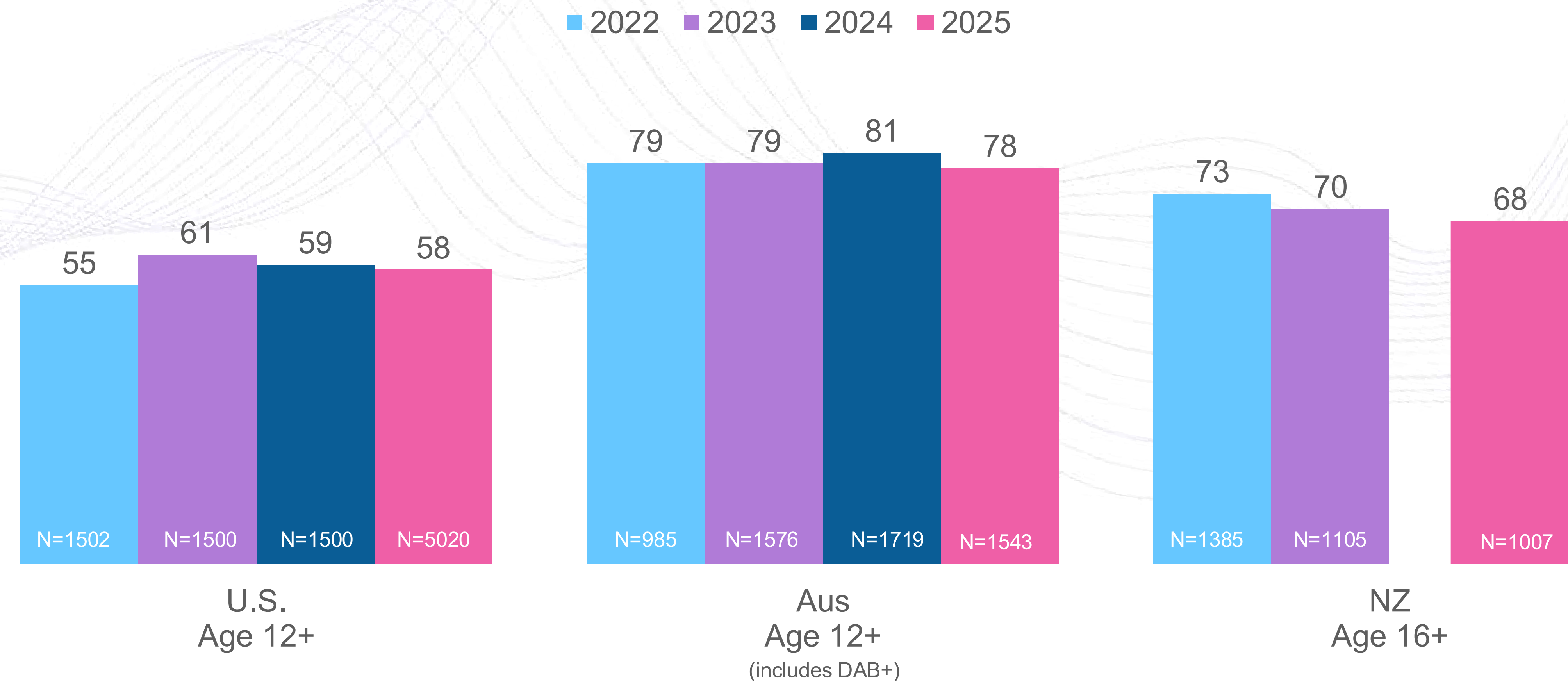


The majority of the population are listening to Live Radio

Listening to AM/FM Radio in the last week

TOTAL POPULATIONS

% LISTENED TO RADIO IN LAST WEEK
RADIO INCLUDES AM/FM RADIO, BOTH OVER-THE-AIR AND ONLINE

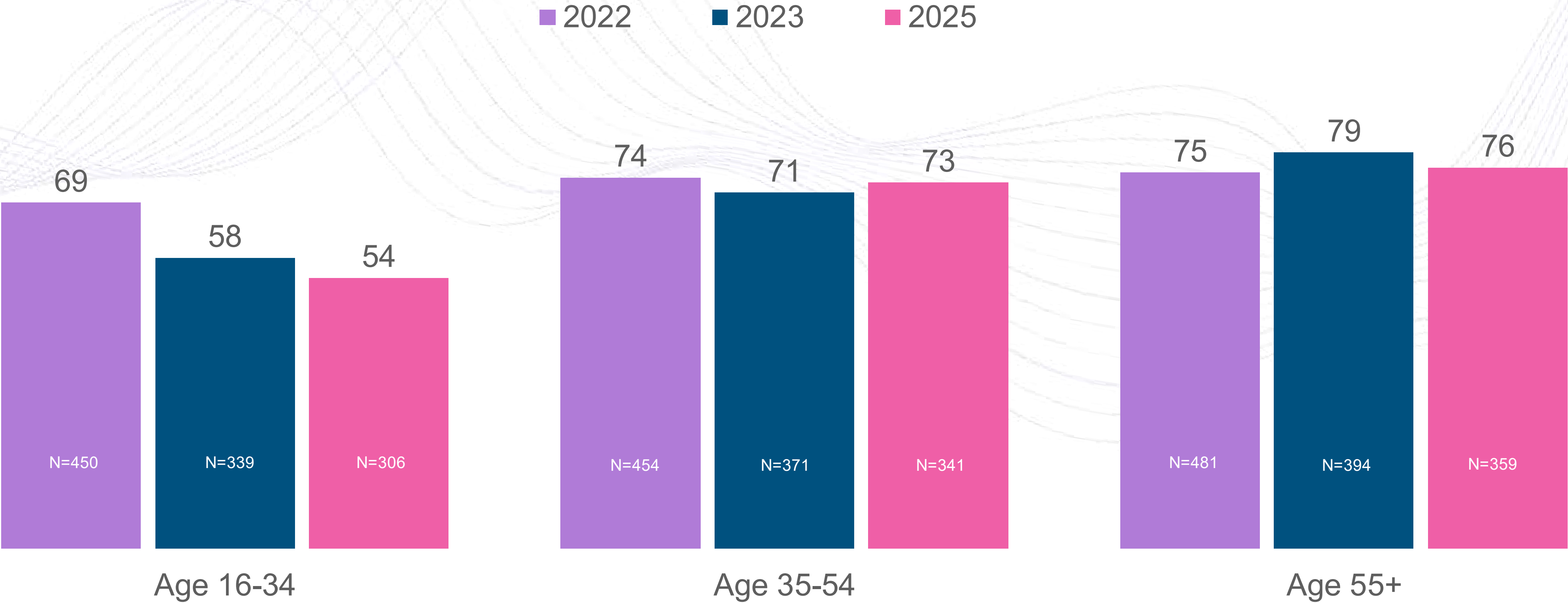


Improvement for Radio among those over 35

Listening to AM/FM Radio in the last week

TOTAL NEW ZEALAND POPULATION 16+

% LISTENED TO RADIO IN LAST WEEK
RADIO INCLUDES AM/FM RADIO, BOTH OVER-THE-AIR AND ONLINE

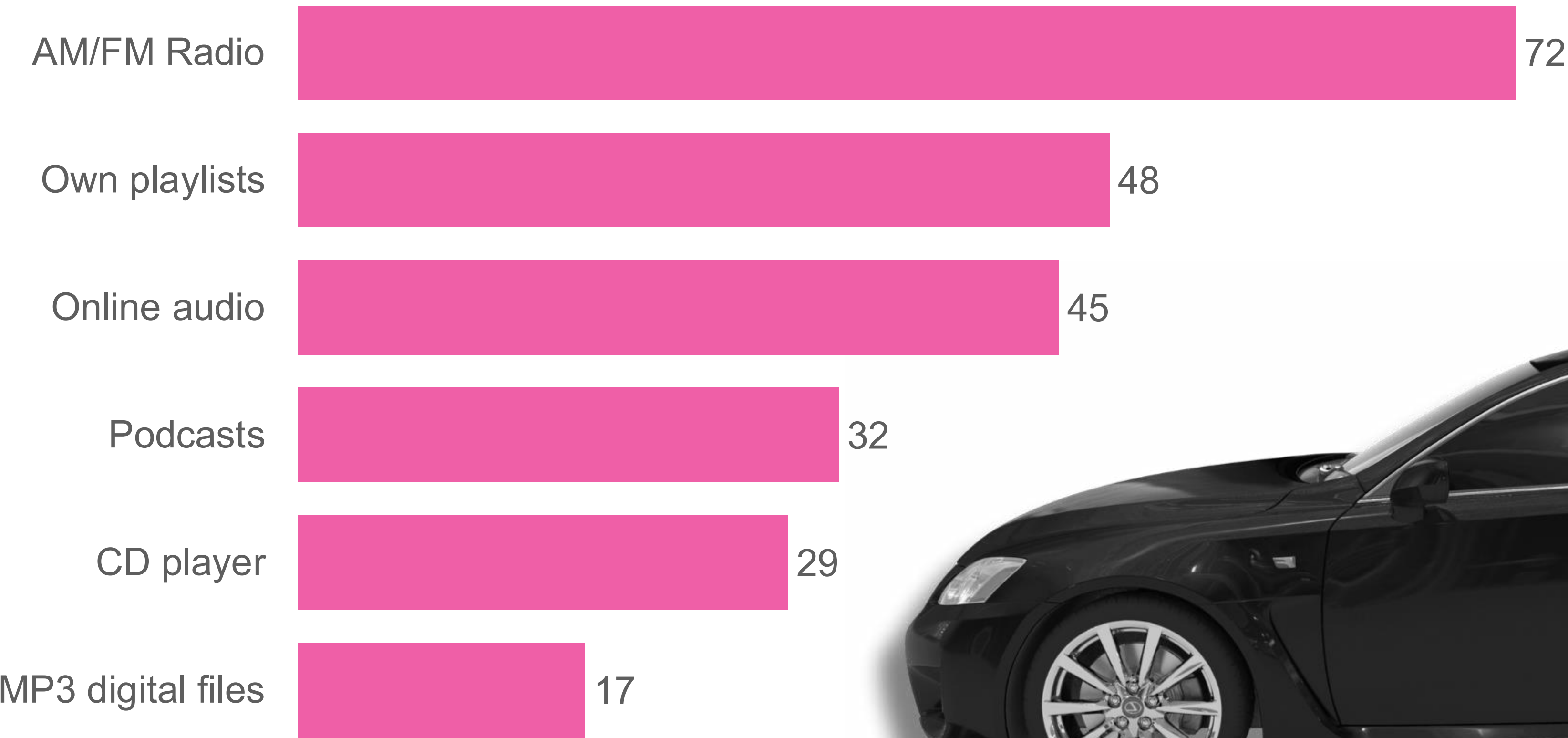


Live Radio is the dominant channel in car

Audio Sources Currently Used in Car

BASE: NEW ZEALAND AGE 16+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; N=914

% USING AUDIO SOURCE IN CAR

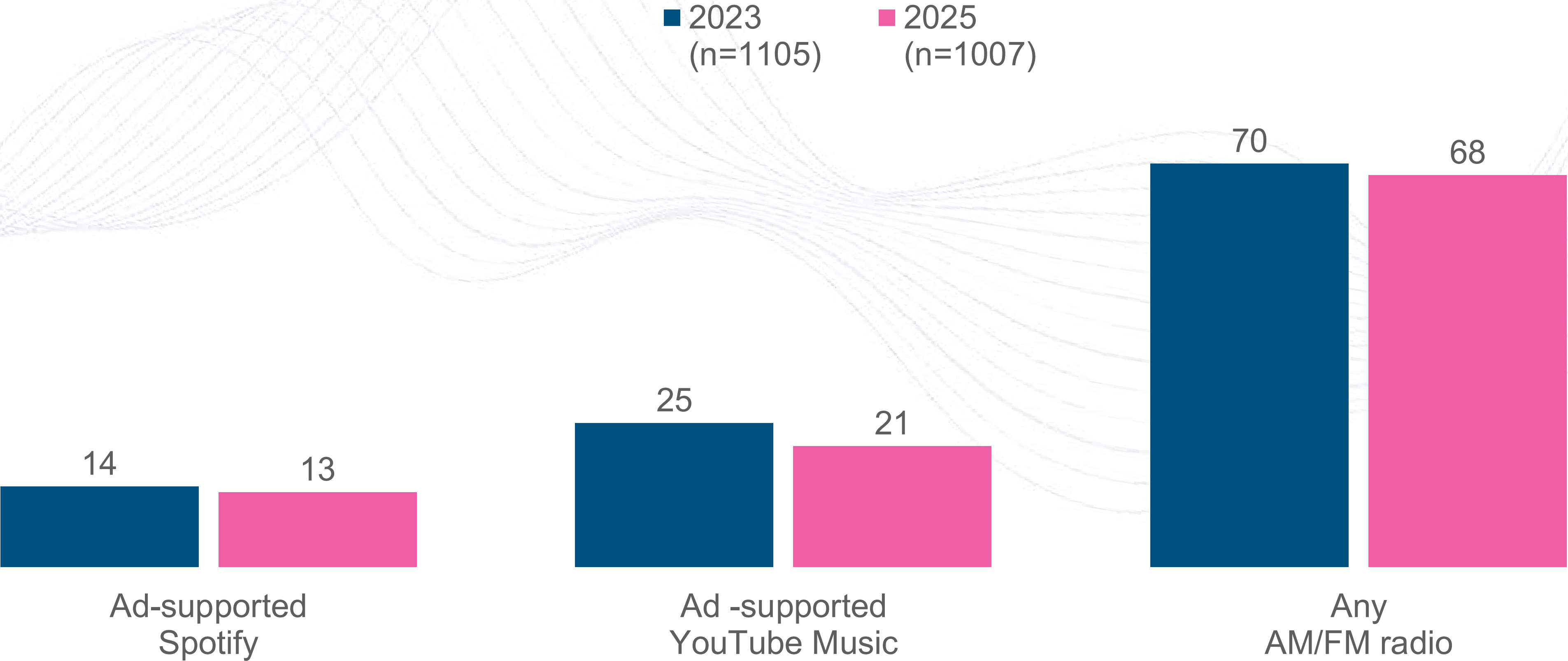


Live Radio is also the dominant, scaled ad supported audio channel

Weekly Listening to Ad-Supported Audio

TOTAL NEW ZEALAND POPULATION 16+

% LISTENED TO AUDIO SOURCE IN LAST WEEK



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Online Audio



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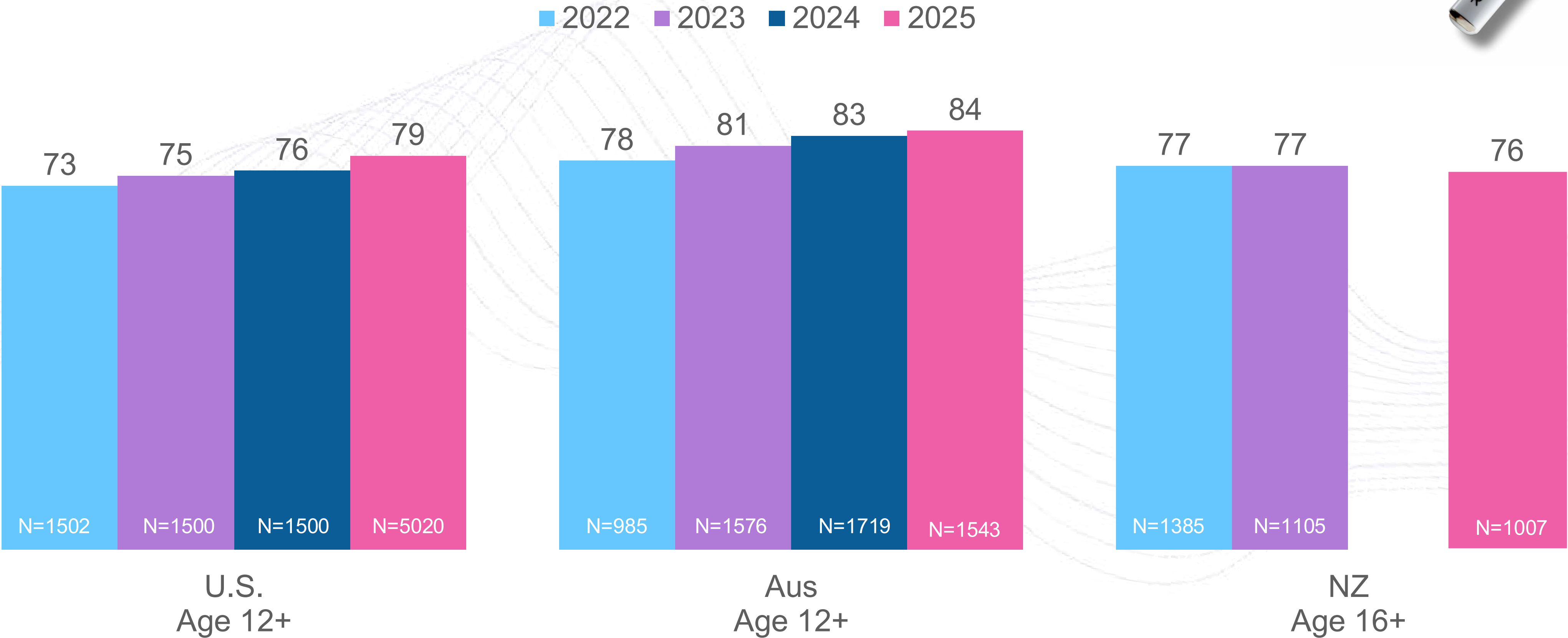
Online Audio very stable, suggesting at a threshold

Monthly Online Audio Listening

TOTAL POPULATIONS

% LISTENED TO ONLINE AUDIO IN LAST MONTH

ONLINE AUDIO = LISTENING TO AM/FM/DAB RADIO STATIONS ONLINE AND/OR LISTENING TO STREAMED AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET



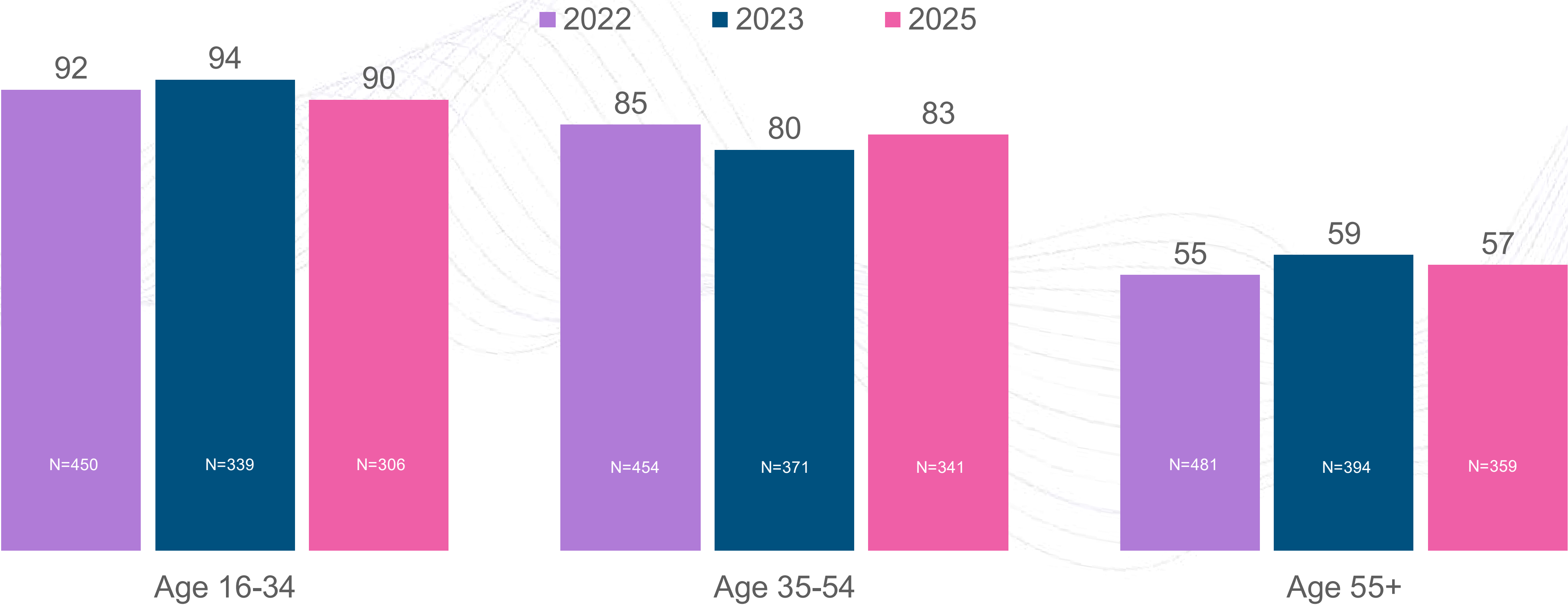
Slight shifts only; audience delivery is maintained across the ages

Monthly Online Audio Listening

TOTAL NEW ZEALAND POPULATION 16+

% LISTENED TO ONLINE AUDIO IN LAST MONTH

ONLINE AUDIO = LISTENING TO AM/FM RADIO STATIONS ONLINE AND/OR LISTENING TO STREAMED AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET

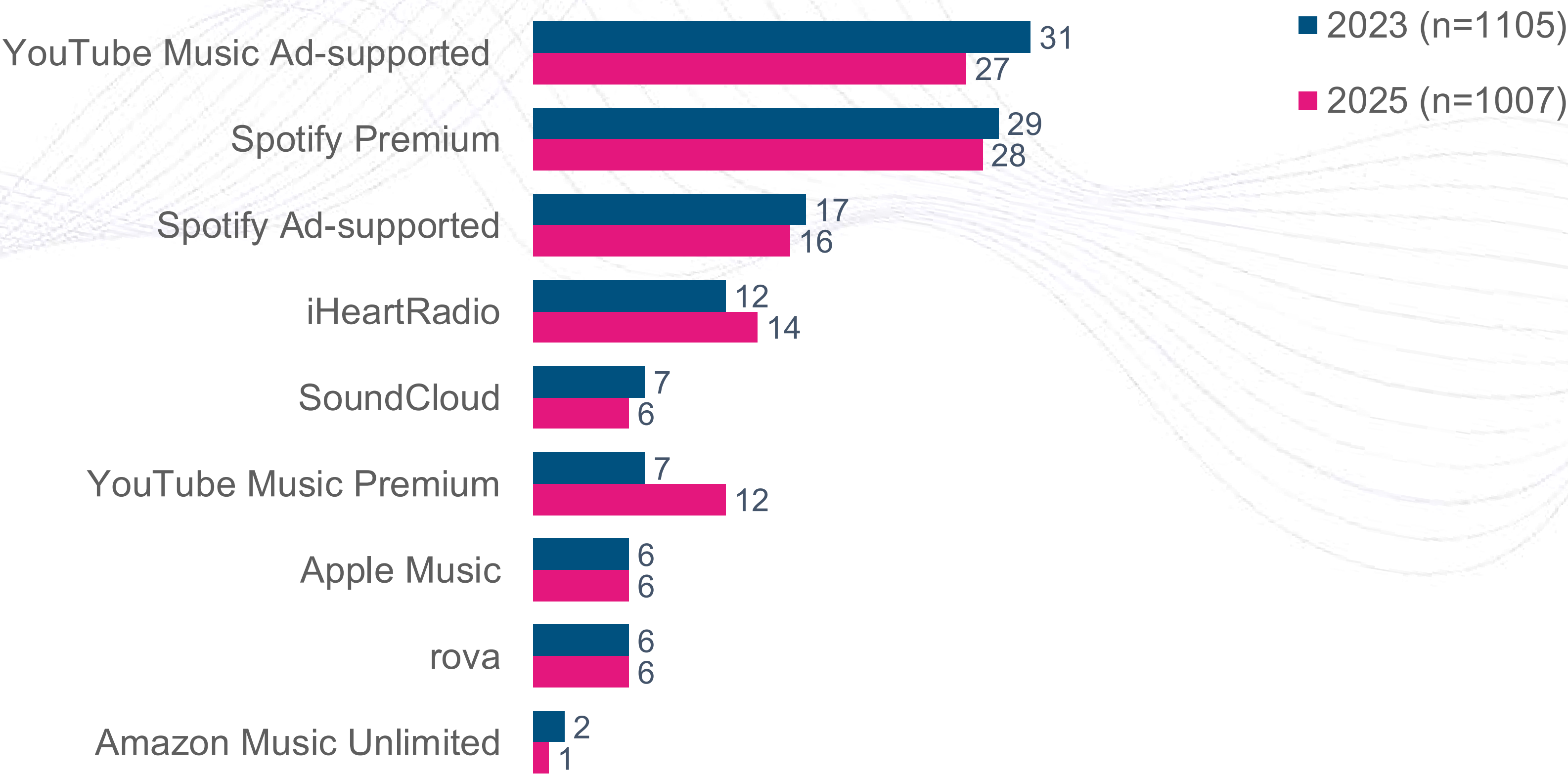


General decline across the global ad-supported platforms

Online Audio Platforms Listened to in Last Month

TOTAL NEW ZEALAND POPULATION 16+

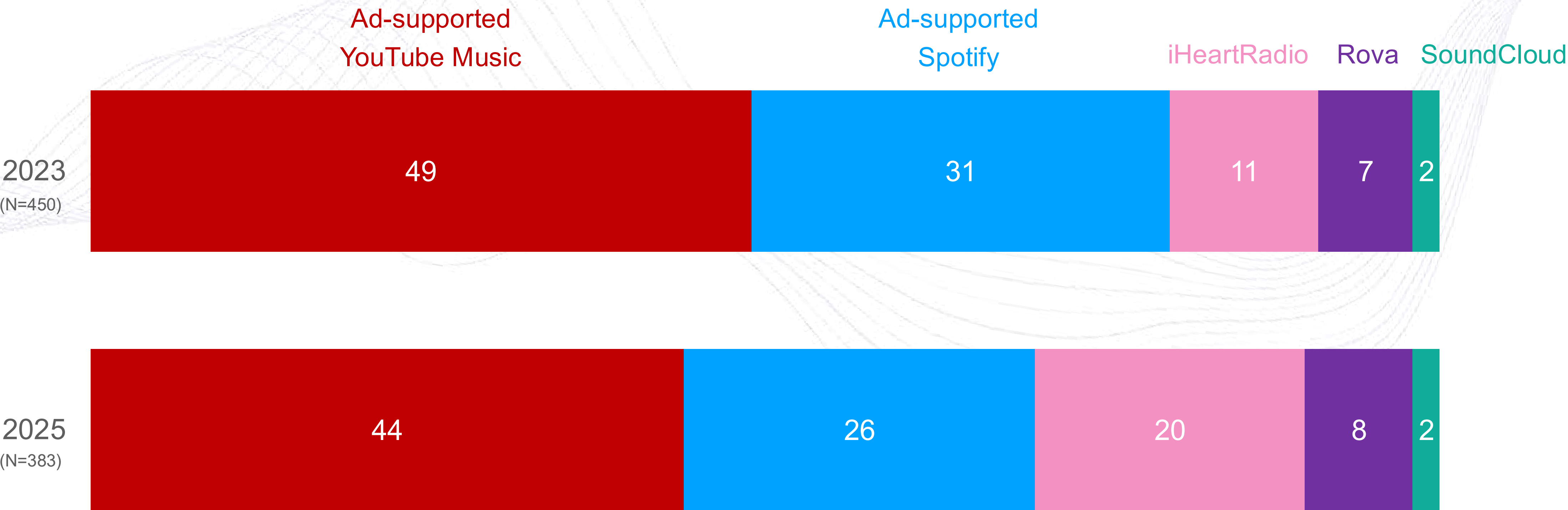
% LISTENED TO ONLINE AUDIO BRAND IN LAST MONTH



Significant growth in NZ platforms used most often

Ad-Supported Audio Platform Used Most Often

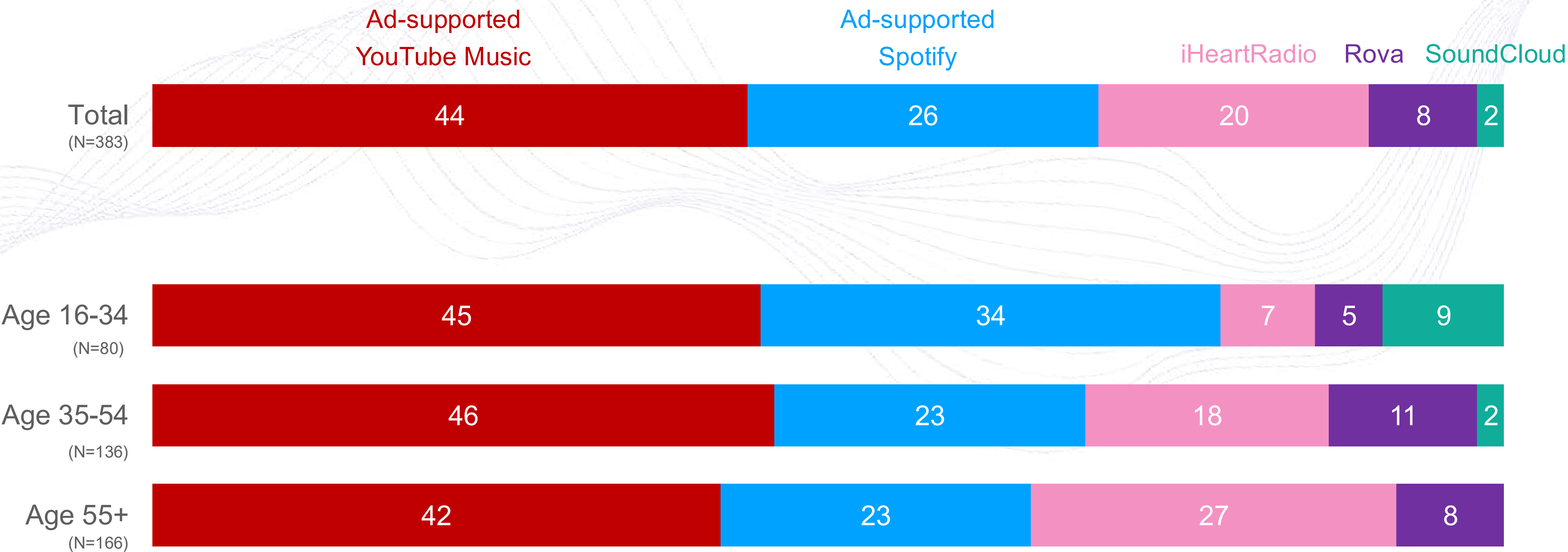
BASE: NEW ZEALAND POPULATION 16+ AND USE AD-SUPPORTED ONLINE AUDIO MOST OFTEN



NZ platforms show strength in key commercial audiences

Ad-Supported Audio Platform Used Most Often

BASE: NEW ZEALAND POPULATION 16+ AND USE AD-SUPPORTED ONLINE AUDIO MOST OFTEN



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Podcasting



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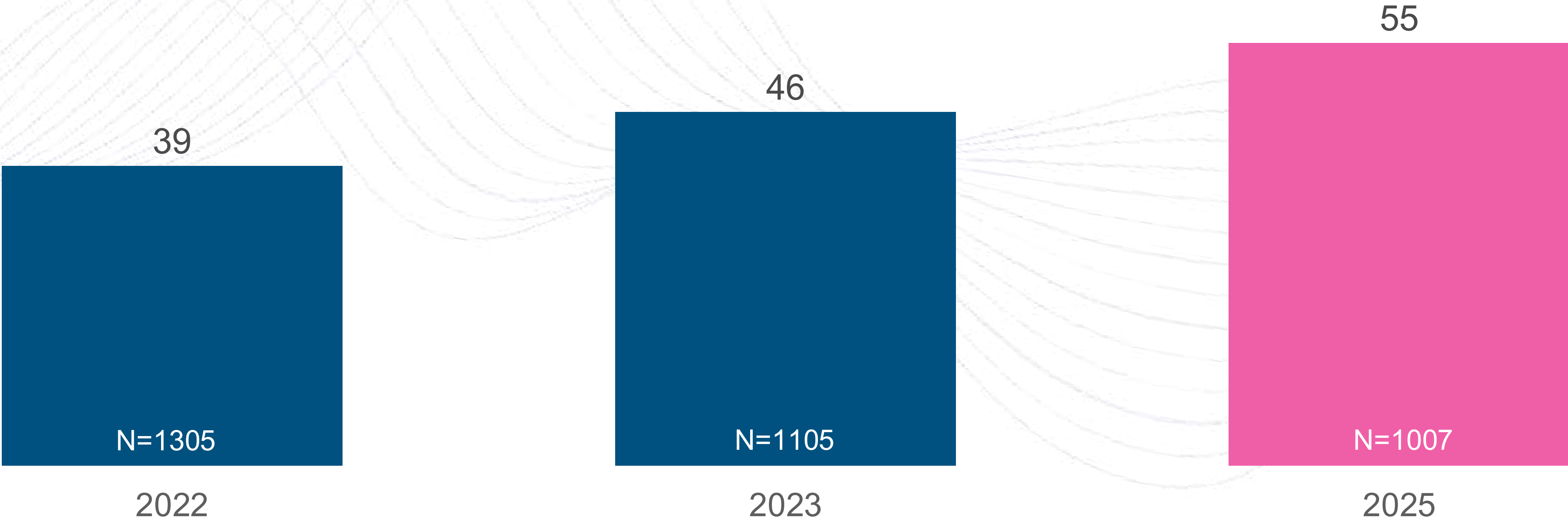
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Podcast continuing to appeal, with 20% growth in listening

Monthly Podcast Consumption

TOTAL NEW ZEALAND POPULATION 16+

% LISTENED TO OR WATCHED A PODCAST IN LAST MONTH

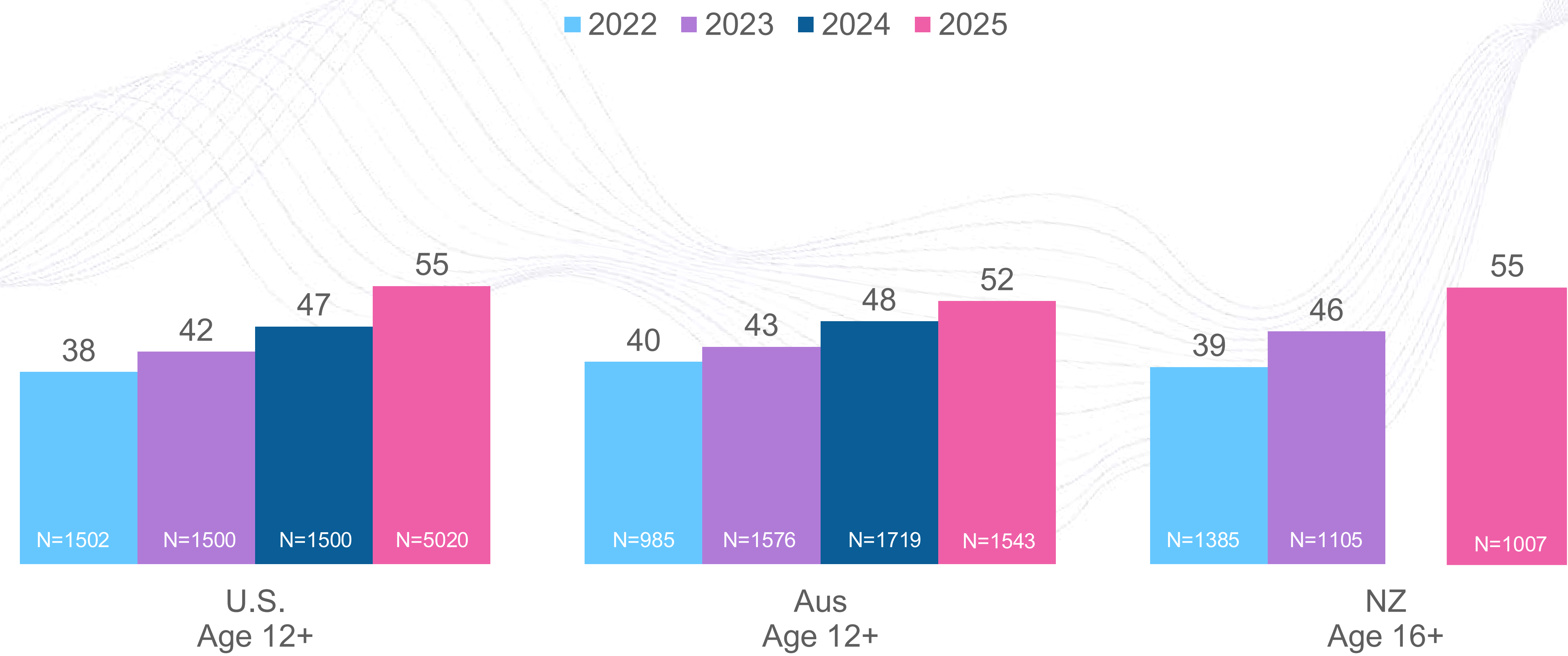


With NZ maintaining world-leading listening levels

Monthly Podcast Consumption

TOTAL POPULATIONS

% LISTENED TO OR WATCHED A PODCAST IN LAST MONTH

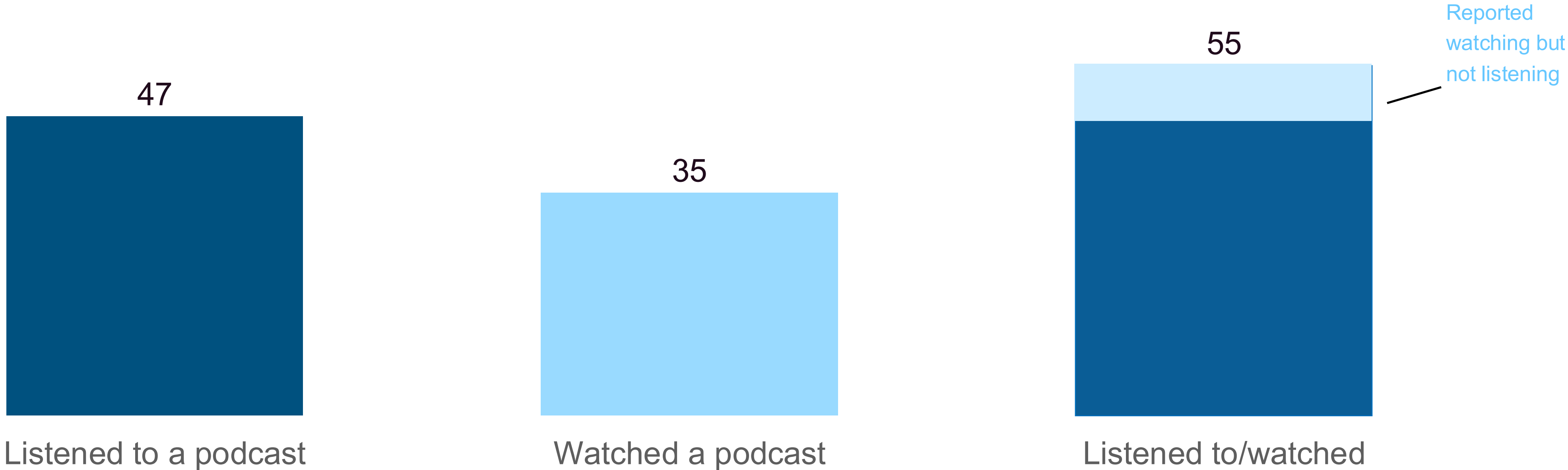


Podcast becoming a multi-channel format

Monthly Podcast Consumption

TOTAL NEW ZEALAND POPULATION 16+

% LISTENED TO OR WATCHED A PODCAST IN LAST MONTH

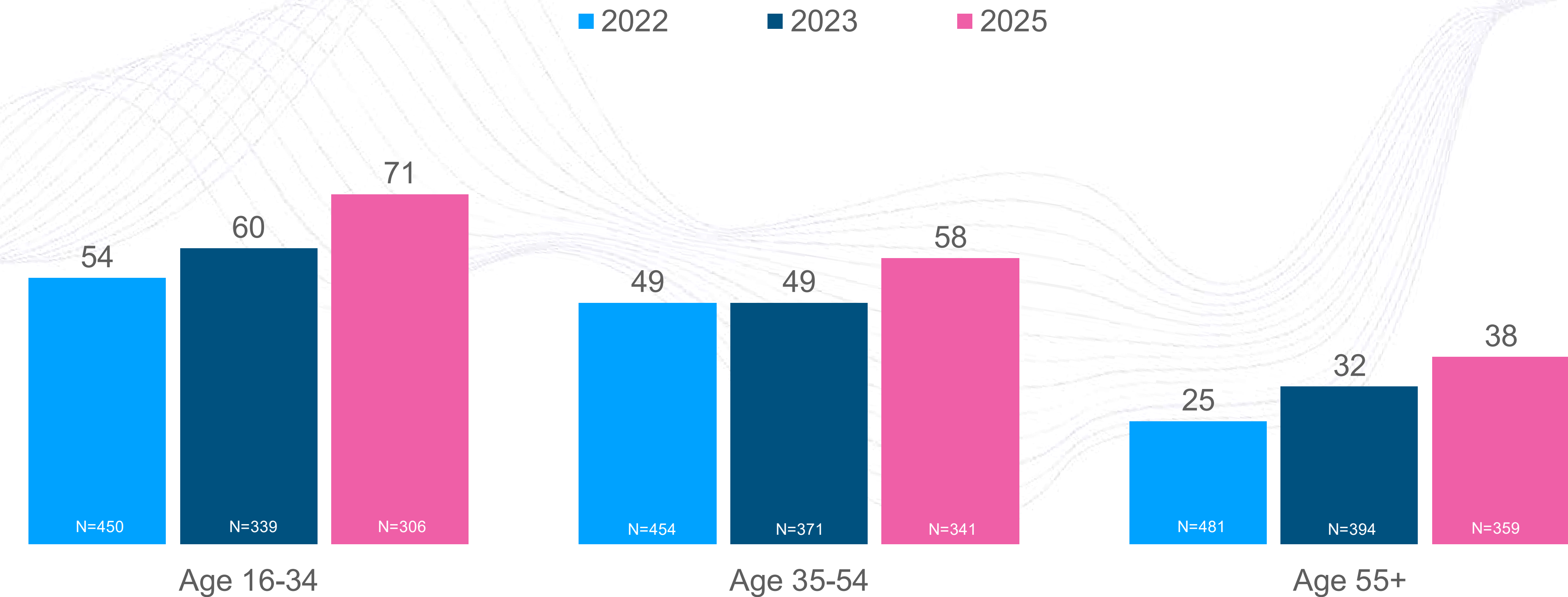


Podcast appeal is increasing across all age groups

Monthly Podcast Consumption

TOTAL NEW ZEALAND POPULATION 16+

% LISTENED TO OR WATCHED A PODCAST IN LAST MONTH



2025 includes listening to or watching podcasts



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Smart Speakers



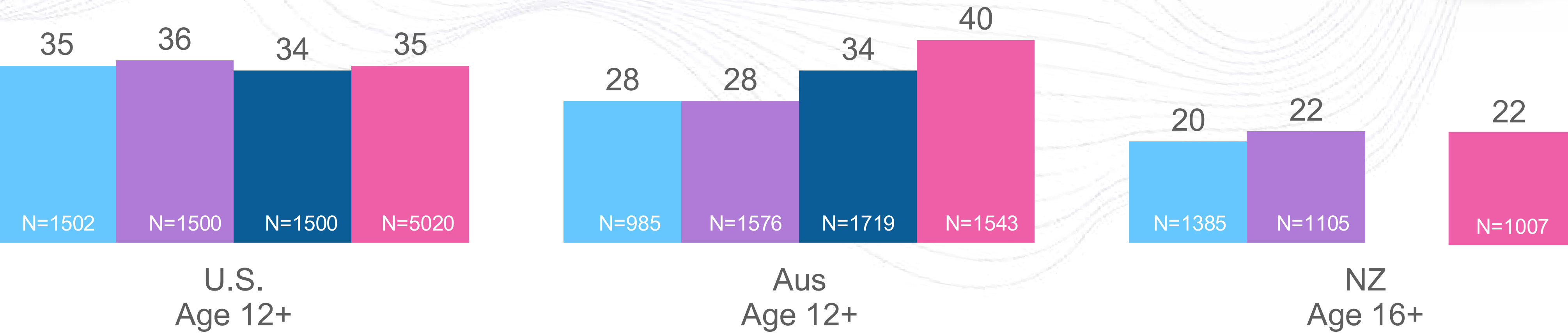
NZ appears to have plateaued below global adoption

Smart Speaker Ownership

TOTAL POPULATIONS

% OWNING SMART SPEAKER

2022 2023 2024 2025

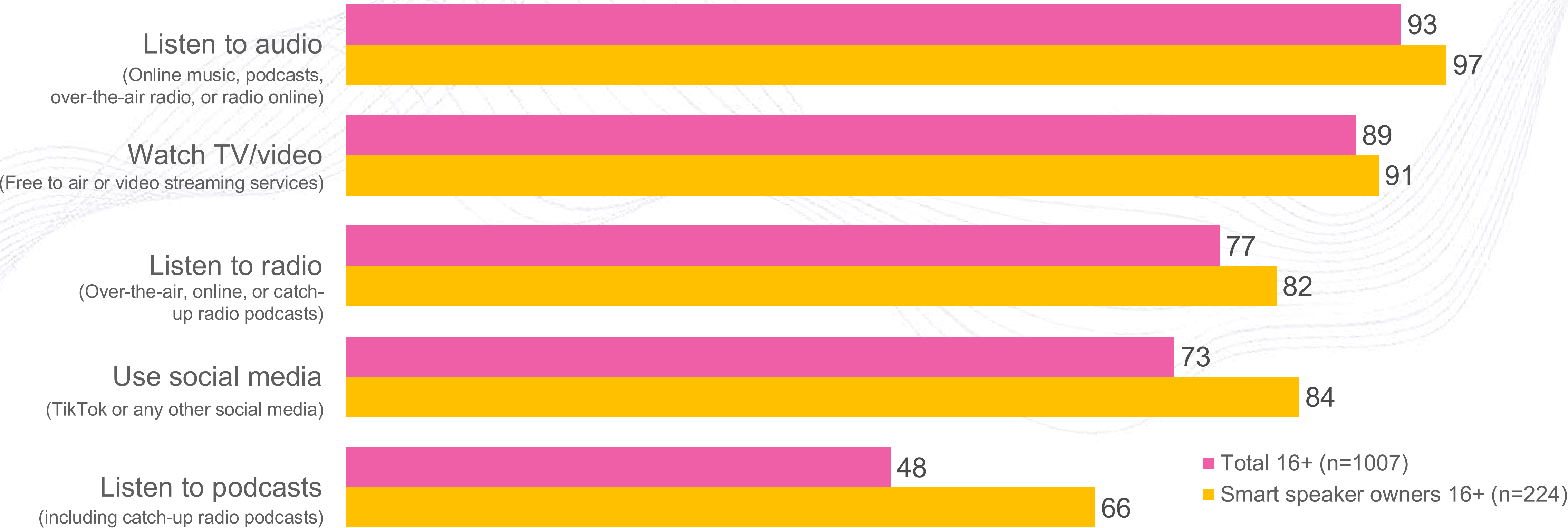


Smart speaker owners consume more audio

Weekly Media Consumption

TOTAL NEW ZEALAND POPULATION 16+

% DOING ACTIVITY IN THE LAST WEEK



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In-Car Media



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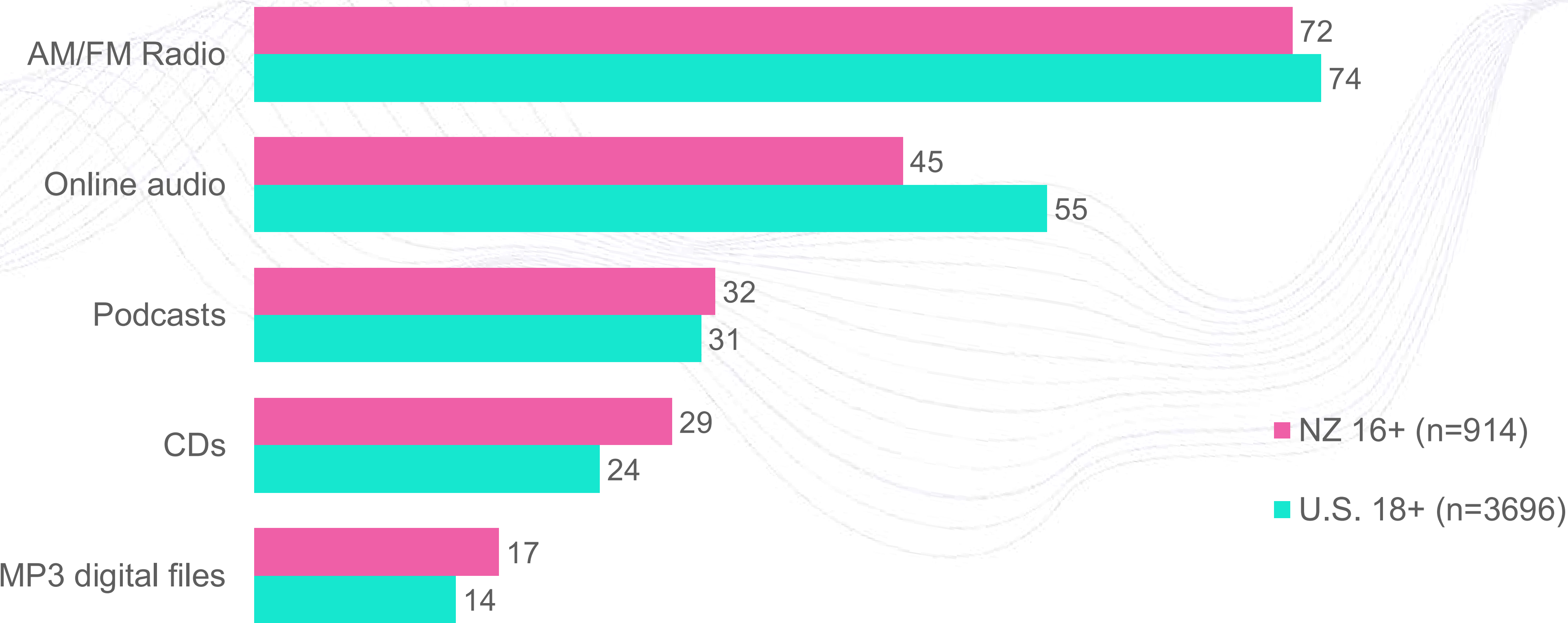
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In NZ in-car radio more dominant than in the US

Audio Sources Currently Used in Car

BASE: HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH

% USING AUDIO SOURCE IN CAR

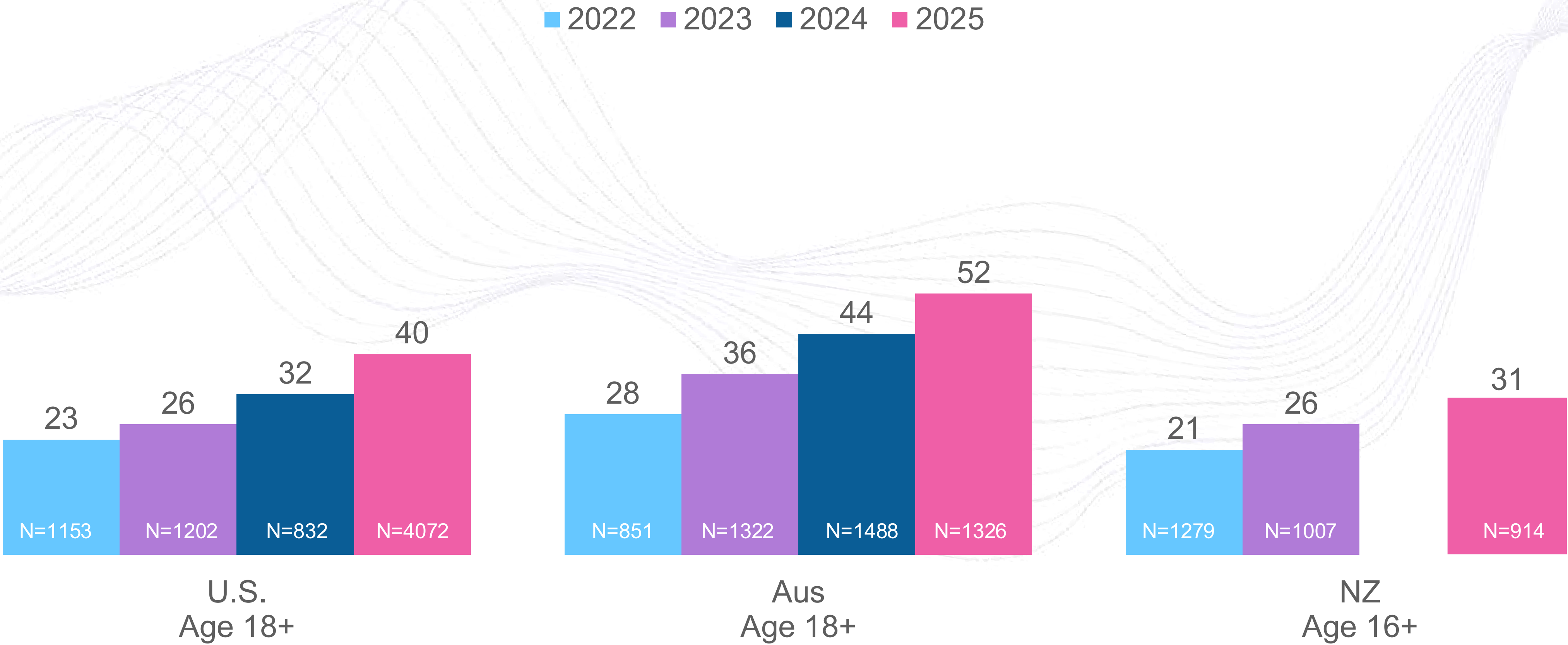


Despite growth we remain behind other comparable markets

Have Apple CarPlay or Android Auto in Primary Vehicle

BASE: HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH

% WITH APPLE CARPLAY OR ANDROID AUTO IN PRIMARY VEHICLE

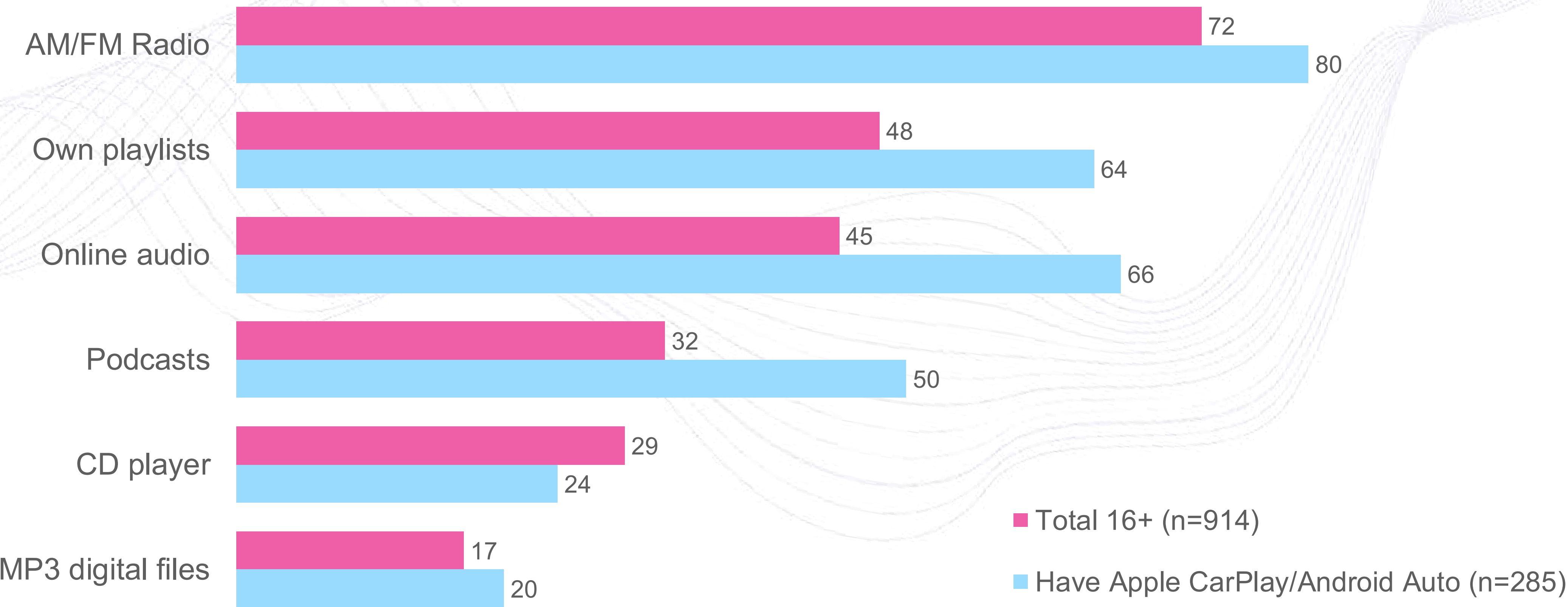


In-car technology driving overall audio consumption usage

Audio Sources Used in Car among those who have Apple CarPlay or Android Auto

BASE: NEW ZEALAND AGE 16+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 91%

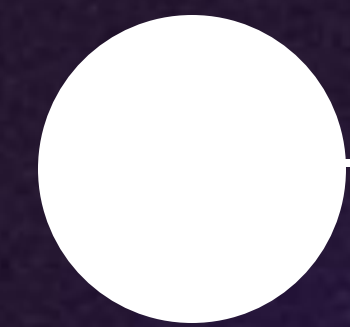
% USING AUDIO SOURCE IN CAR



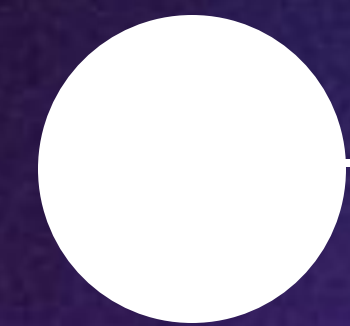
In Conclusion



Observations



94% of NZ consuming audio weekly demonstrates the strength of connection Live Radio and Podcast has with listeners

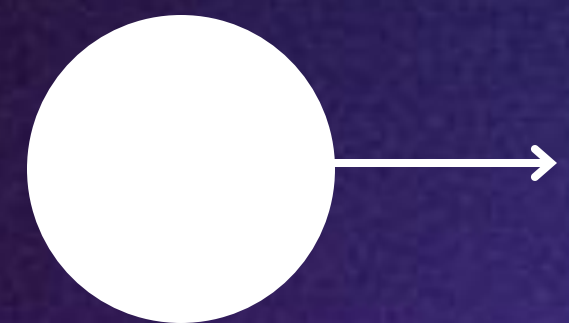


There are myriad opportunities to leverage this connection to the advantage of advertisers

Observations



Live radio continues to demonstrate its resilience (both here and globally), remaining dominant in car and providing scaled audience on a daily basis



Radio for reach

Observations

- → The challenge of reaching commercial audience on 'global platforms' is only growing
- → Strengthening local platforms, with local content should be a bigger part of your audio channel mix

Observations

- → Podcast growth continues unabated, with 55% of all NZ and 71% of under 35's listening monthly
- → With Podcast consumption becoming increasingly multi-format it is creating new opportunities for advertisers

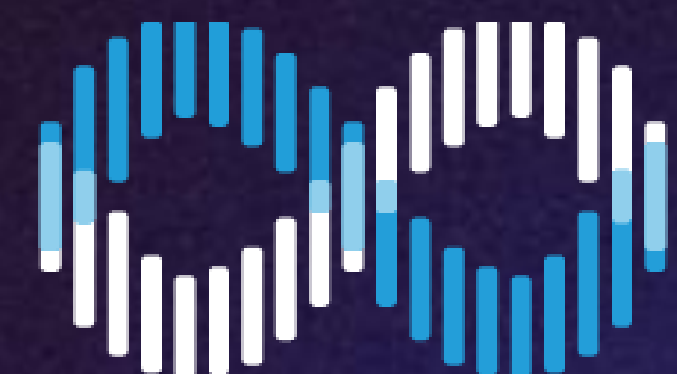
Observations

- → The growth of podcast and online audio is not coming at the expense of our resilient live radio audiences
- → Plan audio holistically and leverage the different listener experiences

Observations

● → In totality audio provides access to highly engaged audiences of any age

● → Adopt an Audio first planning mentality



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