

The Infinite Dial 2019 Australia

#InfiniteDial

Study Overview

- ▶ The Infinite Dial is the longest-running survey of digital media consumer behaviour in America
- ▶ The Infinite Dial Australia 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
- ▶ Infinite Dial Australia, now in its third year, explores the penetration of online digital audio and social media in Australia, as well as the online platforms and technologies that Australians are using
- ▶ This study is designed to allow for direct comparisons between the Australian and U.S. markets

Study Methodology

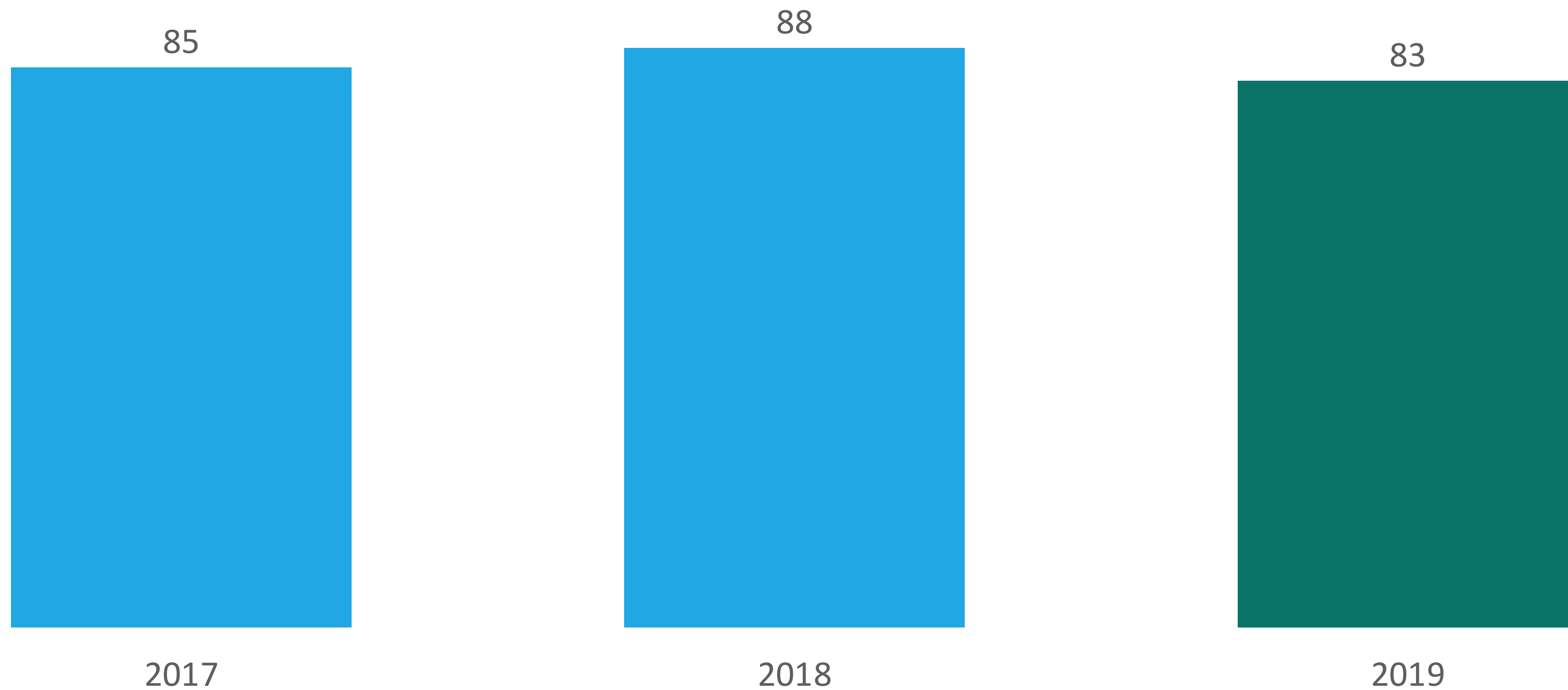
- ▶ In the first quarter of 2019, Edison Research conducted a national telephone survey of 1,021 people aged 12 and older
- ▶ Data weighted to national 12+ population figures

Radio & Radio Simulcast

Listening to AM/FM/DAB+ Radio in the Last Week

TOTAL AUSTRALIAN POPULATION 12+

% LISTENING TO AM/FM/DAB+ RADIO IN THE LAST WEEK

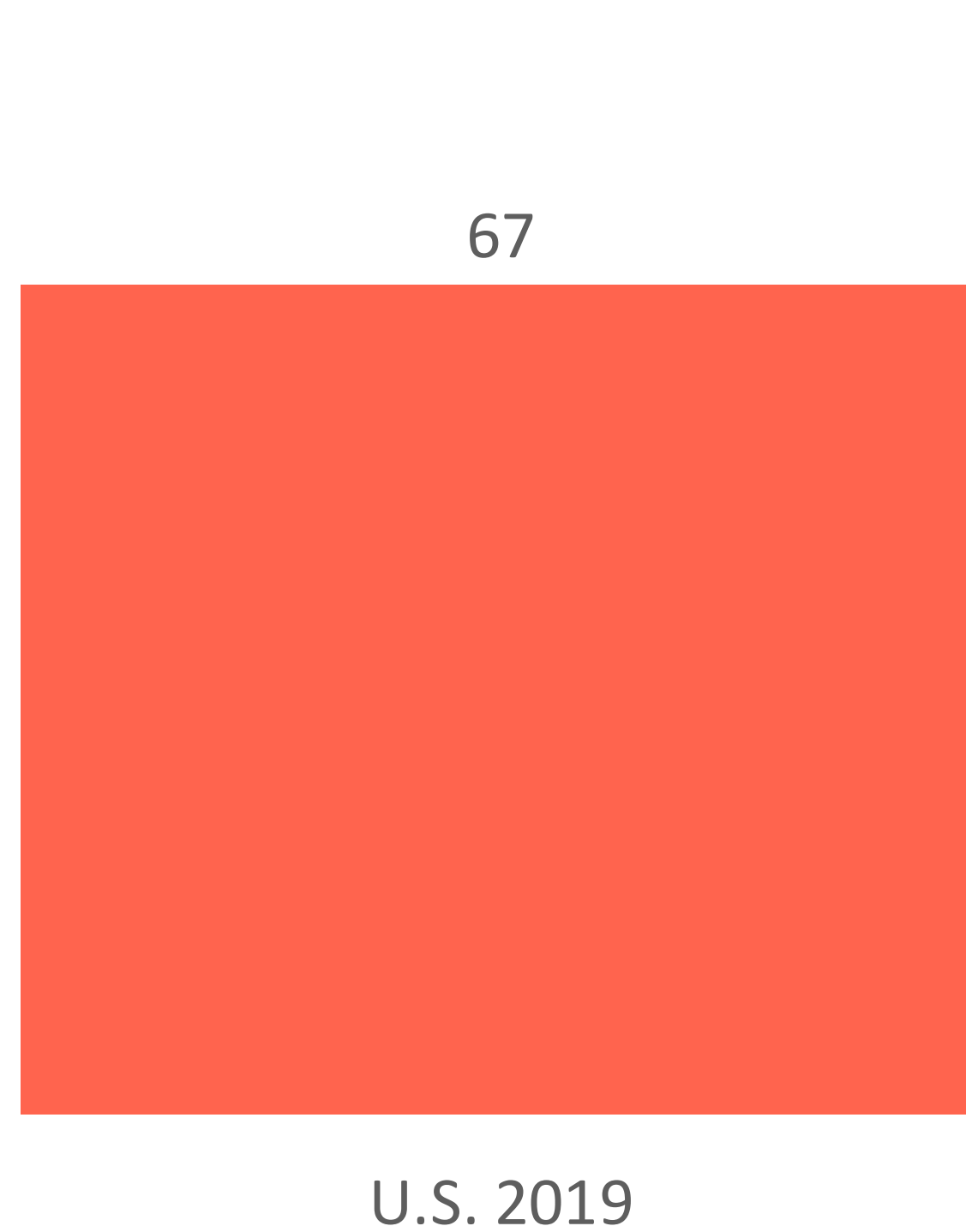


AM/FM RADIO INCLUDES BOTH OVER-THE-AIR AND ONLINE; 2017 FIGURES DO NOT INCLUDE DAB+ LISTENING

Listening to AM/FM Radio in the Last Week

TOTAL POPULATION 12+

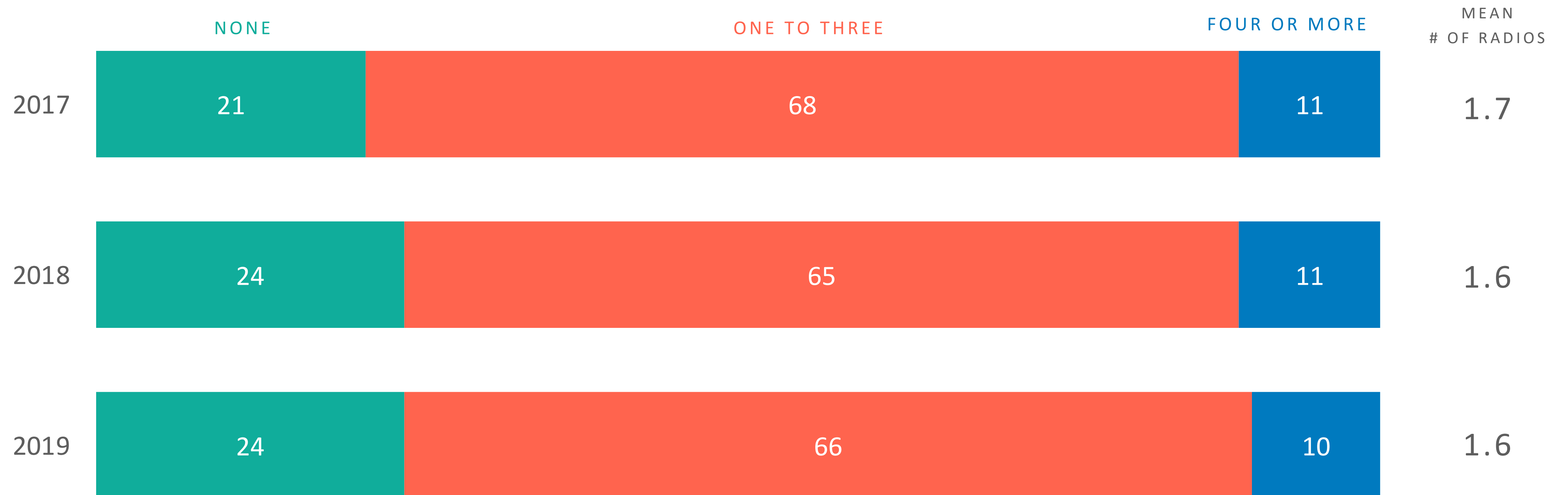
% LISTENING TO AM/FM RADIO IN THE LAST WEEK



AM/FM RADIO INCLUDES BOTH OVER-THE-AIR AND ONLINE

Number of AM/FM/DAB+ Radios in Household

TOTAL AUSTRALIAN POPULATION 12+



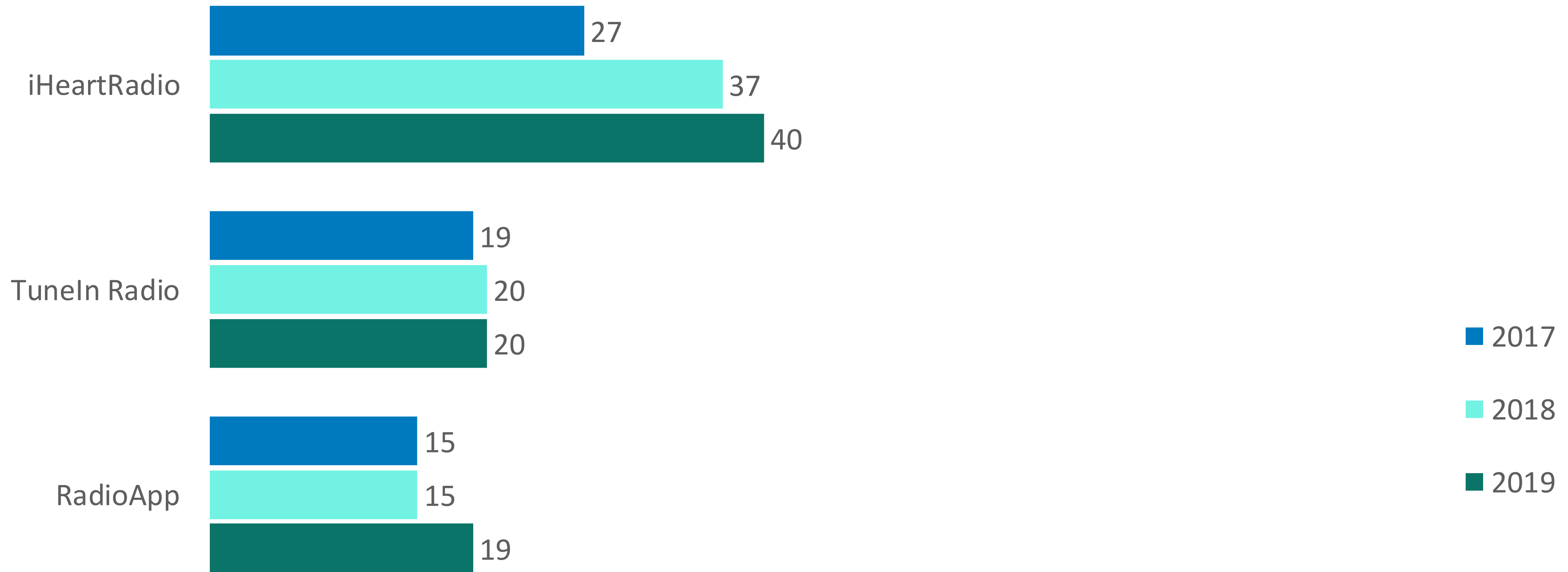
2017 FIGURES DO NOT INCLUDE DAB+ RADIOS

Audio Aggregators

Audio Aggregator Brand Awareness

TOTAL AUSTRALIAN POPULATION 12+

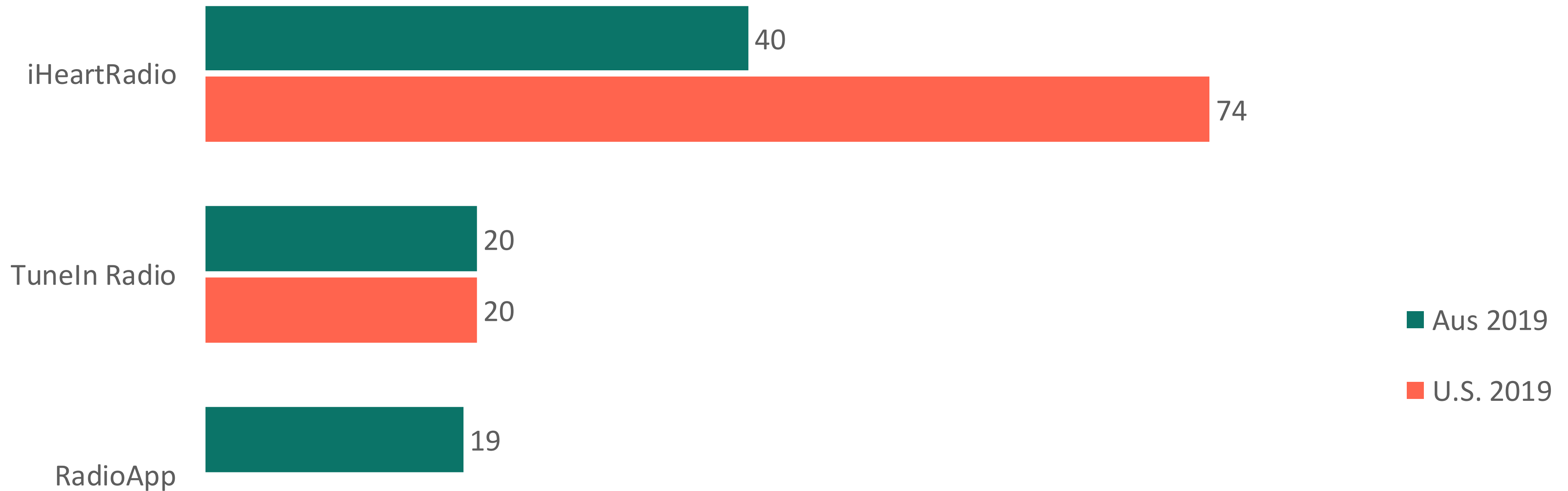
% AWARE OF AUDIO AGGREGATOR BRAND



Audio Aggregator Brand Awareness

TOTAL POPULATION 12+

% AWARE OF AUDIO AGGREGATOR BRAND



Listened to Audio Aggregators in Last Month

TOTAL AUSTRALIAN POPULATION 12+

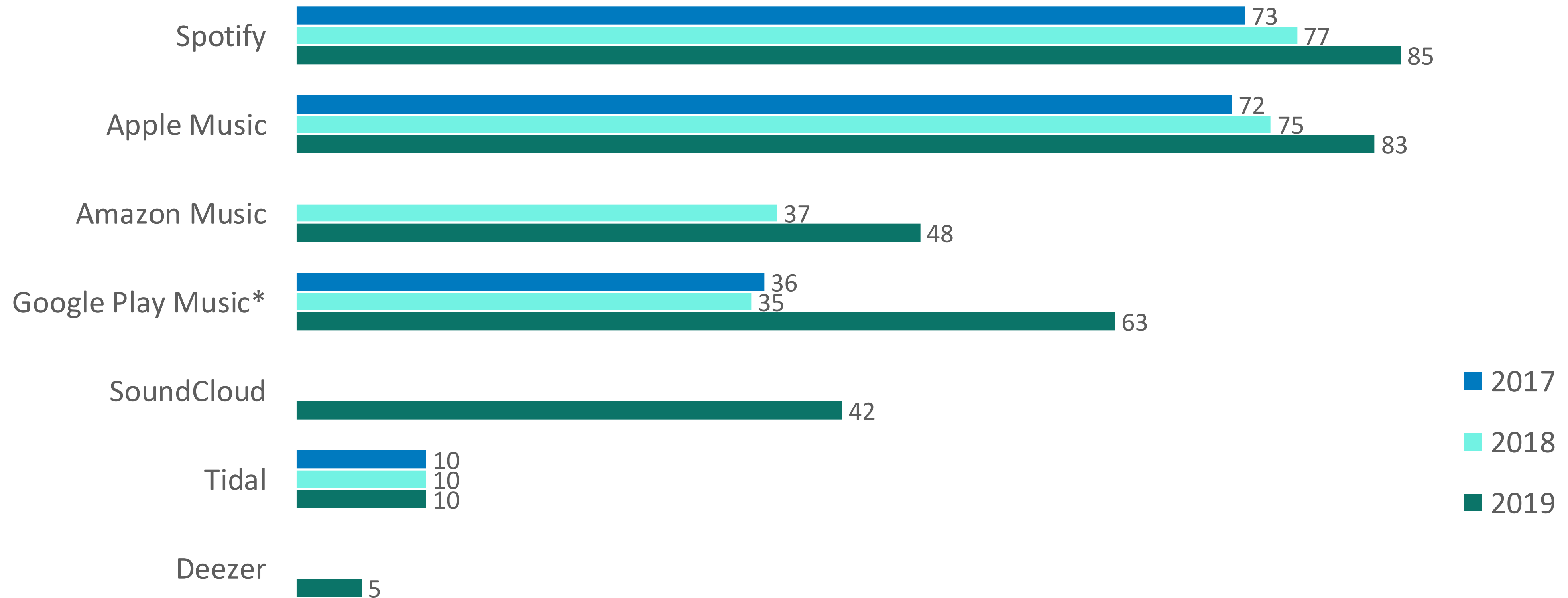


Online Audio Streaming Services

Awareness of Online Audio Streaming Services

TOTAL AUSTRALIAN POPULATION 12+

% AWARE OF ONLINE AUDIO STREAMING SERVICE

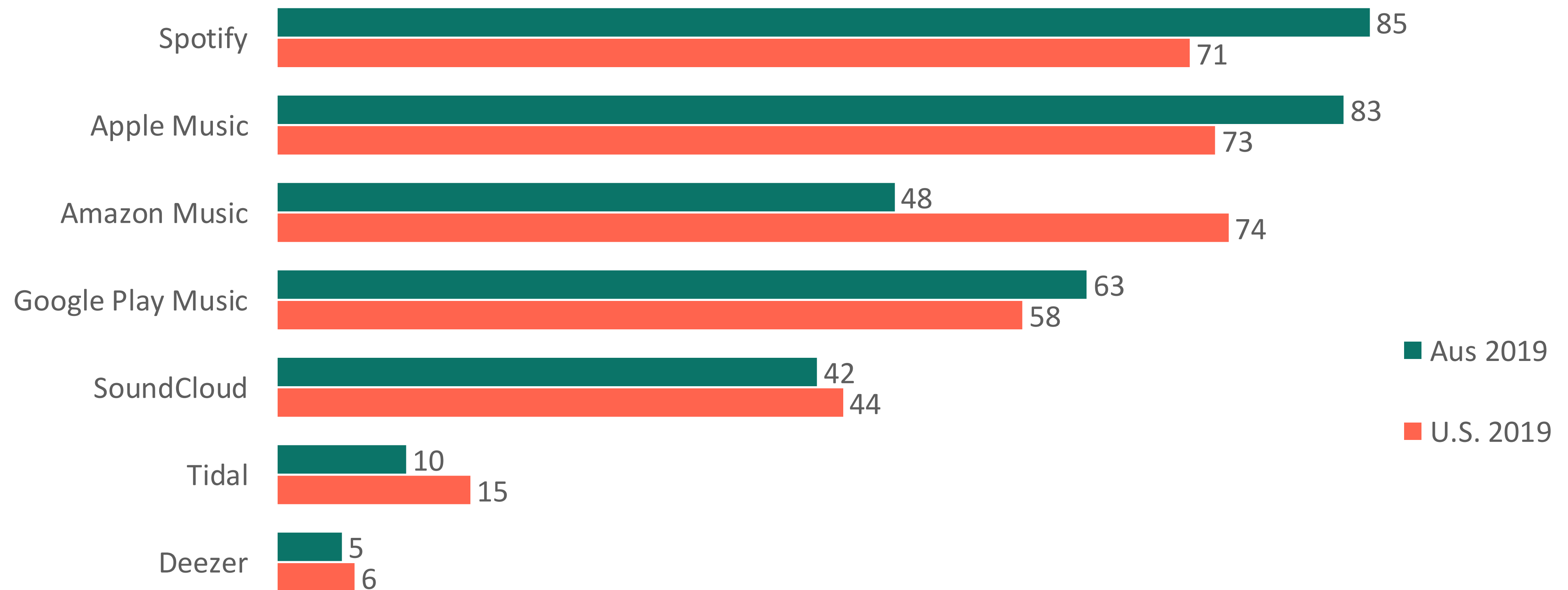


*2017-2018: GOOGLE PLAY ALL ACCESS

Awareness of Online Audio Streaming Services

TOTAL POPULATION 12+

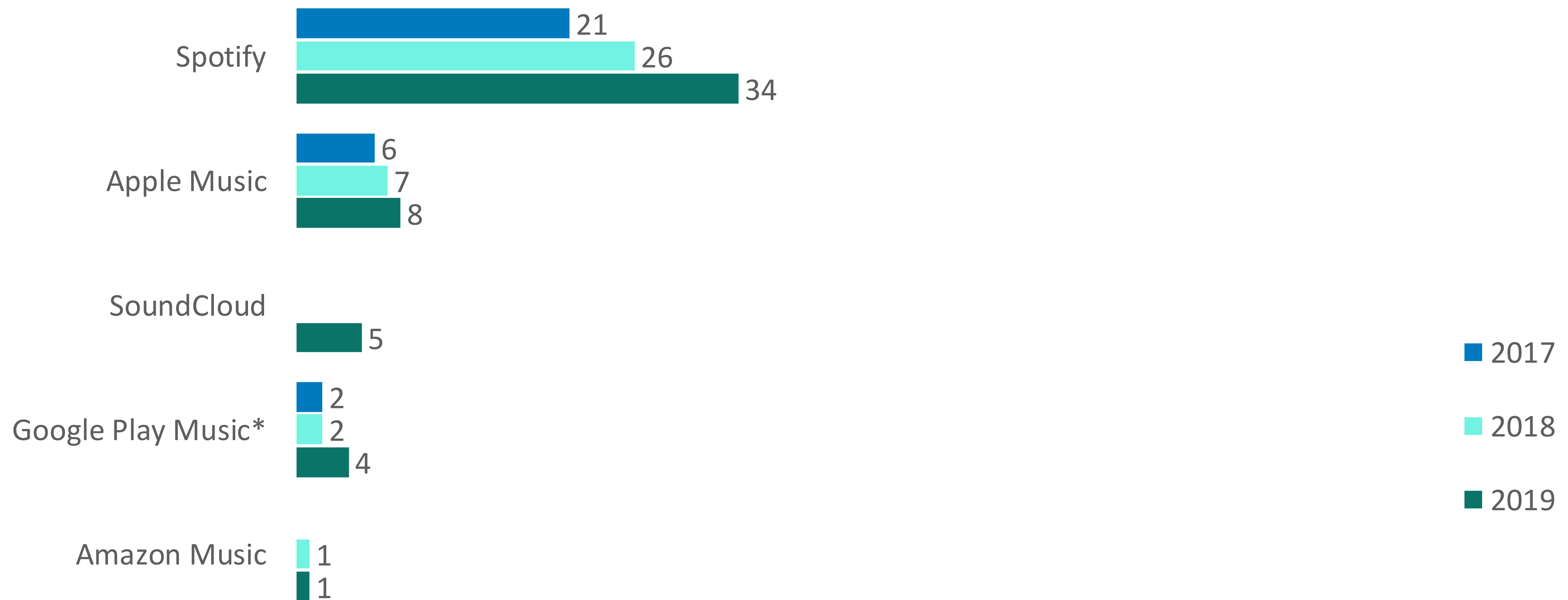
% AWARE OF ONLINE AUDIO STREAMING SERVICE



Weekly Listening to Online Audio Streaming Services

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO ONLINE AUDIO STREAMING SERVICE IN LAST WEEK

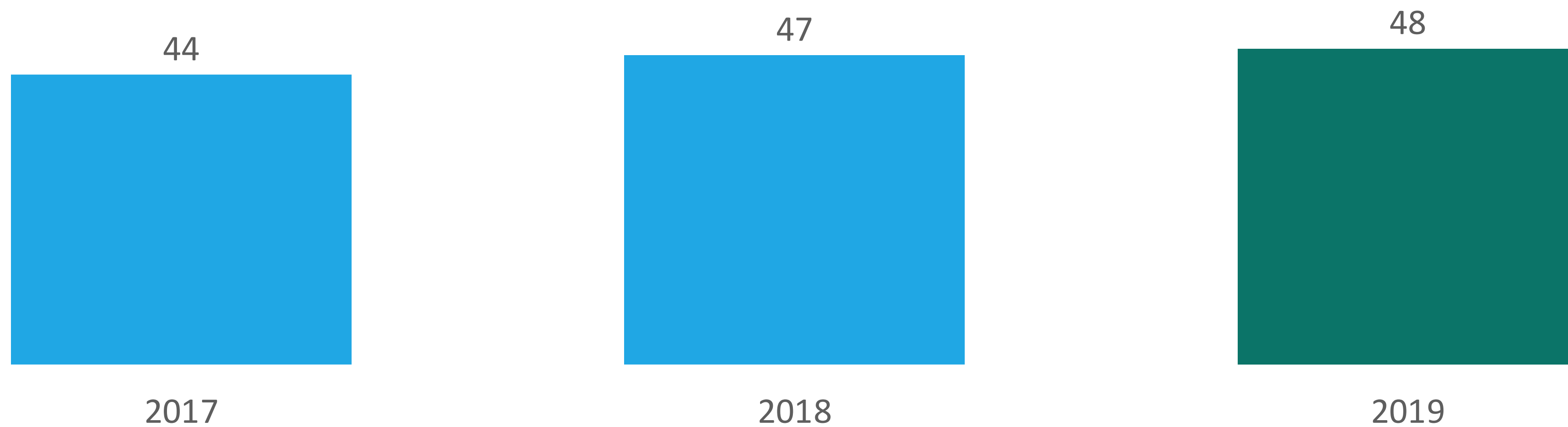


*2017-2018: GOOGLE PLAY ALL ACCESS

Weekly YouTube Music Usage

TOTAL AUSTRALIAN POPULATION 12+

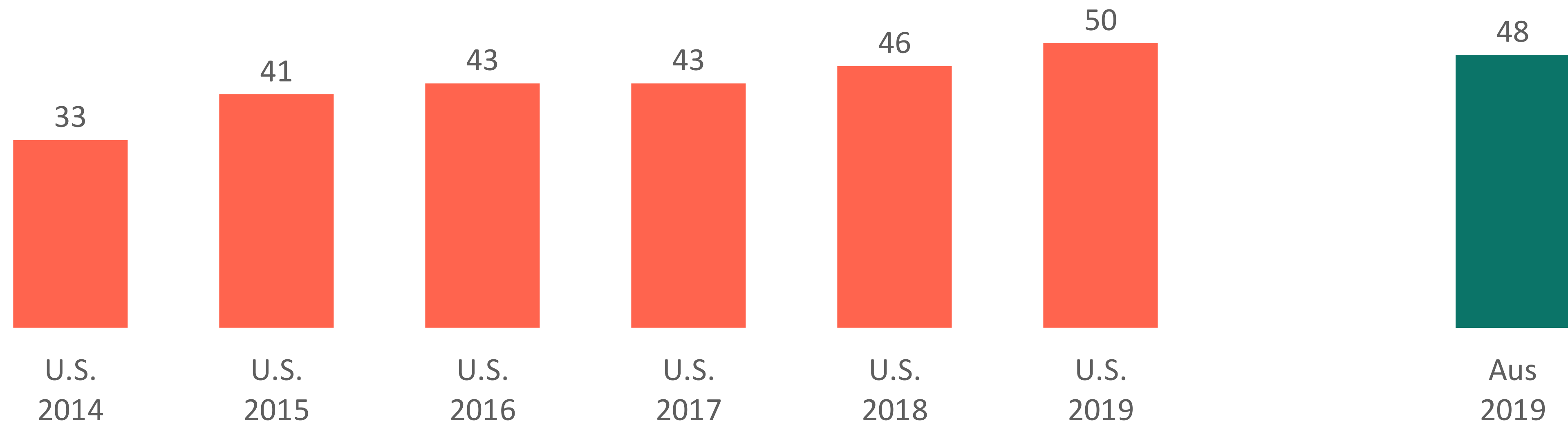
% USED YOUTUBE FOR MUSIC OR MUSIC VIDEOS IN LAST WEEK



Weekly YouTube Music Usage

TOTAL POPULATION 12+

% USED YOUTUBE FOR MUSIC OR MUSIC VIDEOS IN LAST WEEK

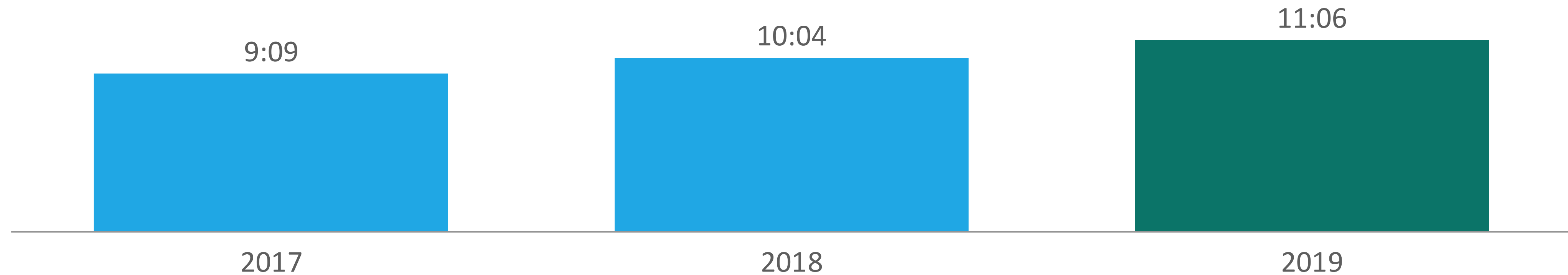


Average Time Spent Listening to Online Audio

BASE: AUSTRALIAN 12+ WEEKLY ONLINE AUDIO LISTENERS

HOURS:MINUTES IN LAST WEEK

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

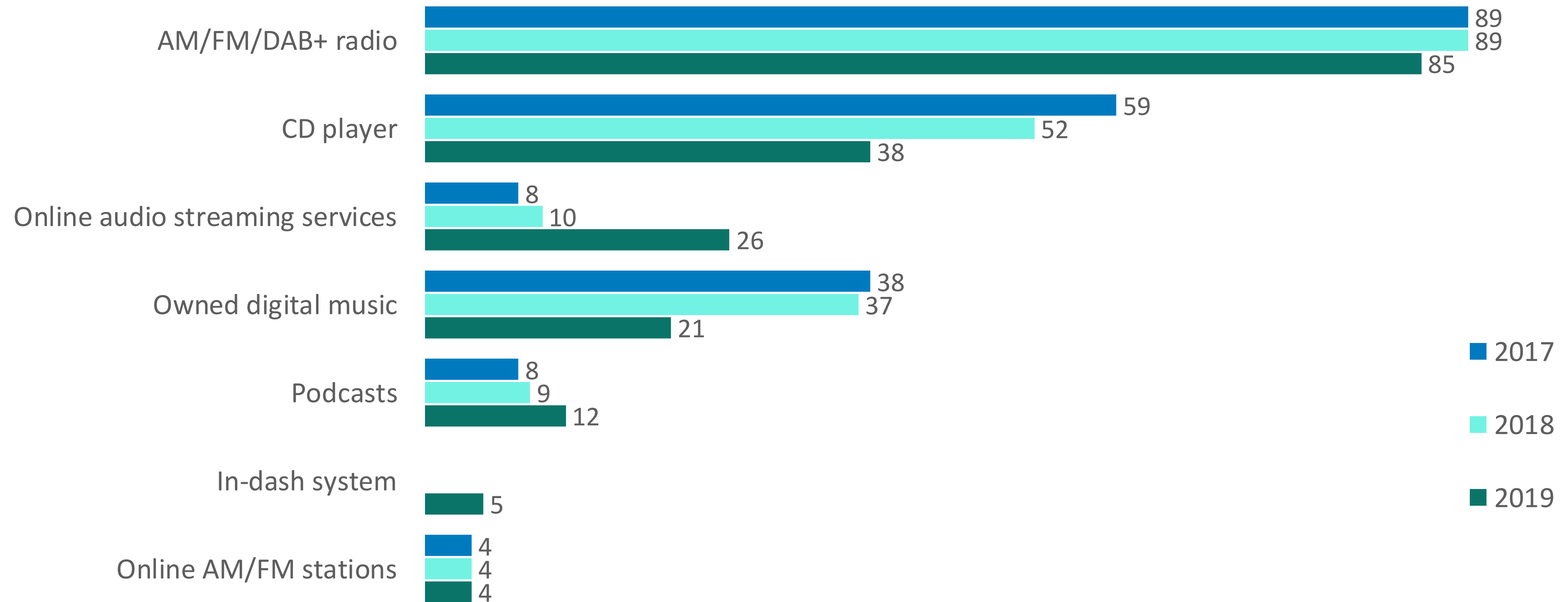


In-Car Media

Audio Sources Used in Car

BASE: AUSTRALIAN 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 87%

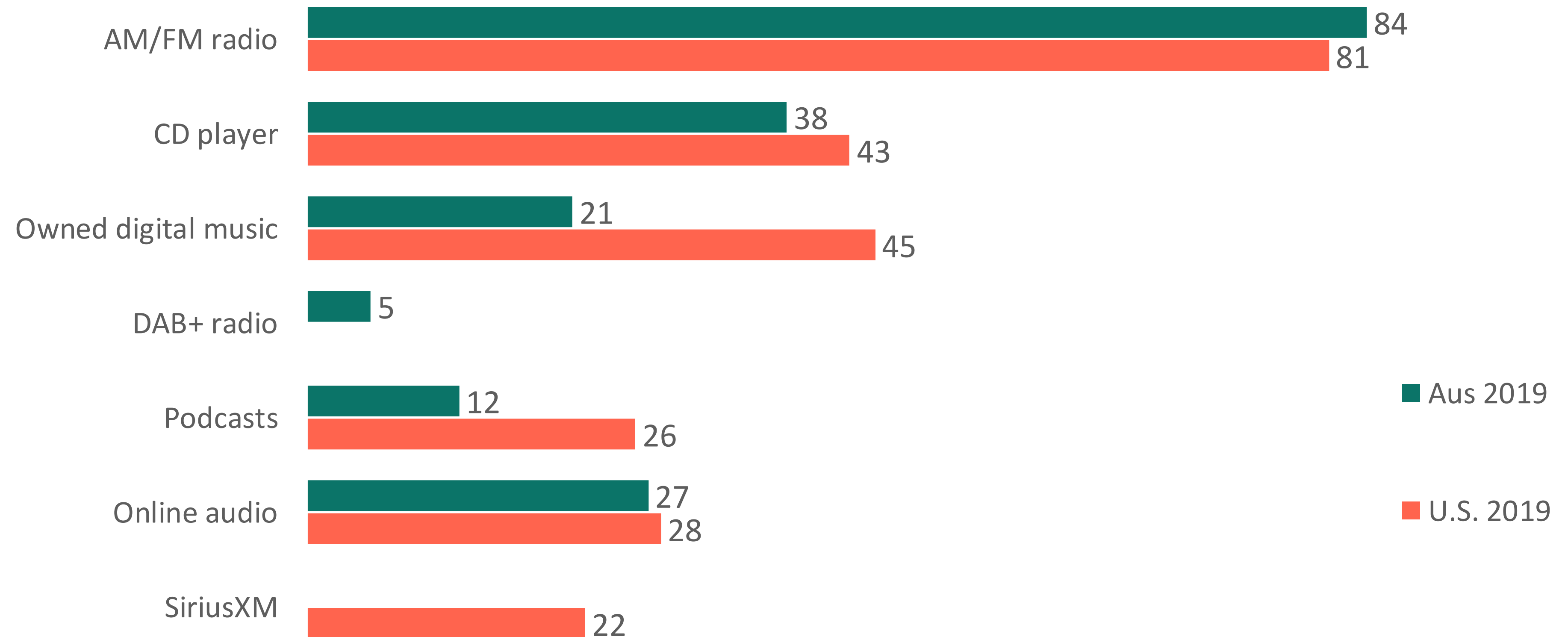
% USING AUDIO SOURCE IN CAR



Audio Sources Used in Car

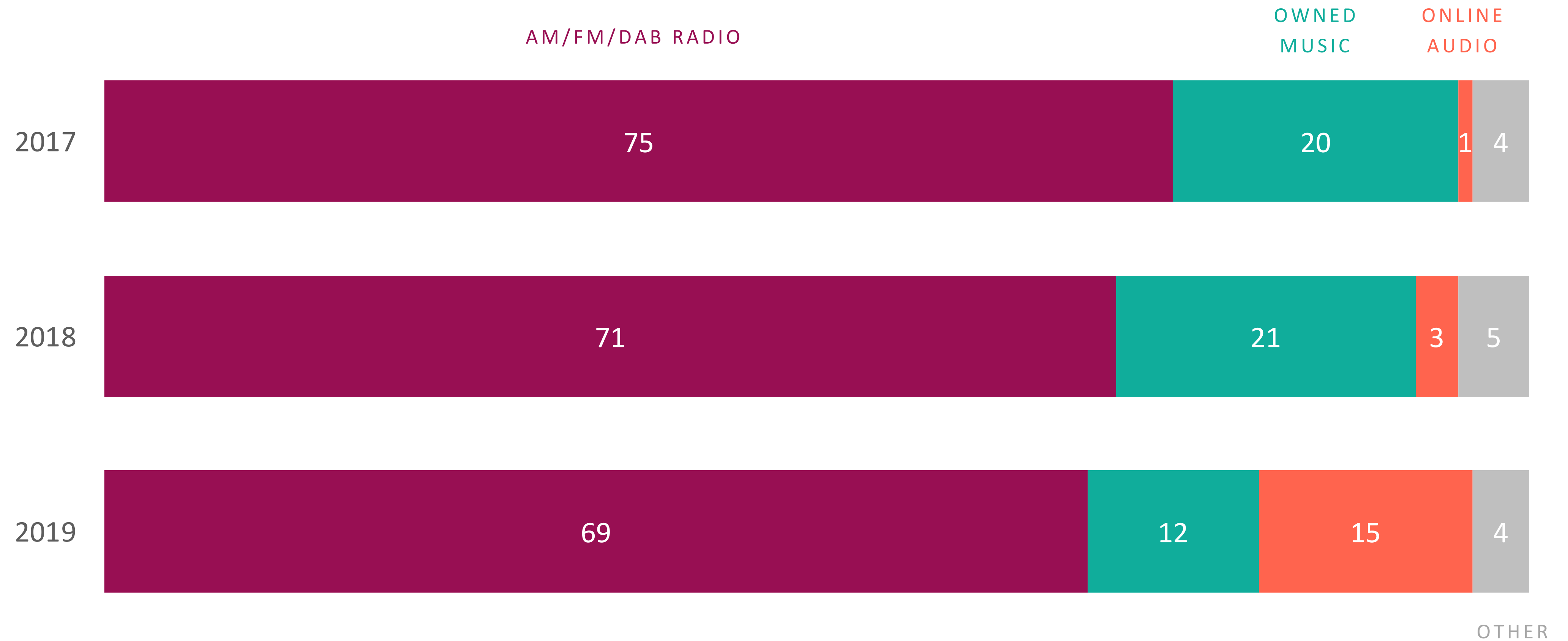
BASE: AGE 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH

% USING AUDIO SOURCE IN CAR



Audio Source Used Most Often in Car

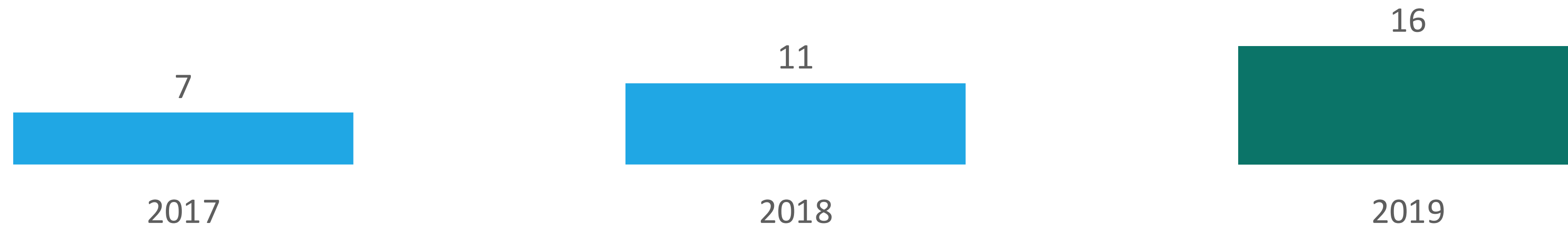
BASE: AUSTRALIAN 18+, DRIVEN/RIDDEN IN CAR IN LAST MONTH, AND USE ANY AUDIO SOURCE IN CAR



In-Dash Information and Entertainment Systems

BASE: AUSTRALIAN 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 87%

% OWNING IN-DASH INFORMATION AND ENTERTAINMENT SYSTEM IN CAR

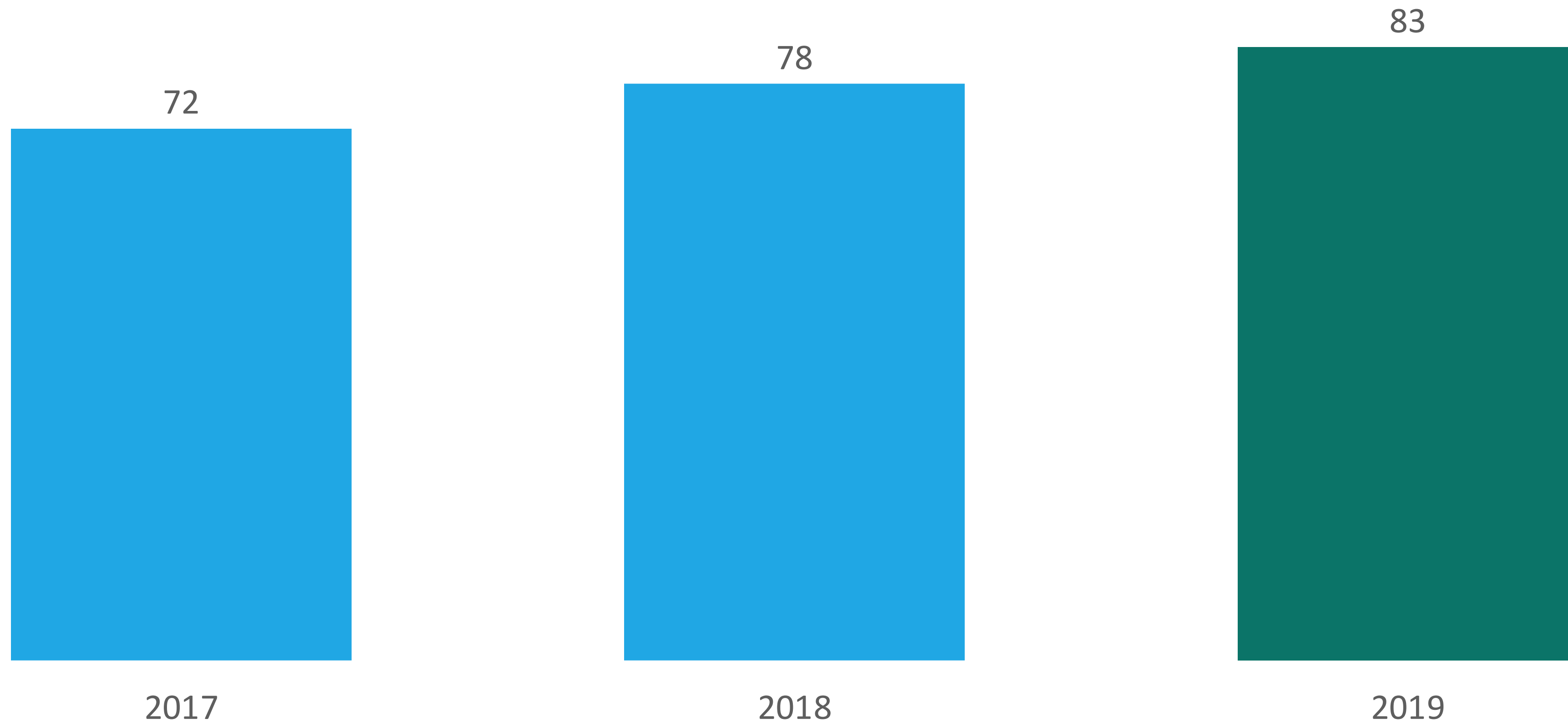


Podcasting

Podcasting Awareness

TOTAL AUSTRALIAN POPULATION 12+

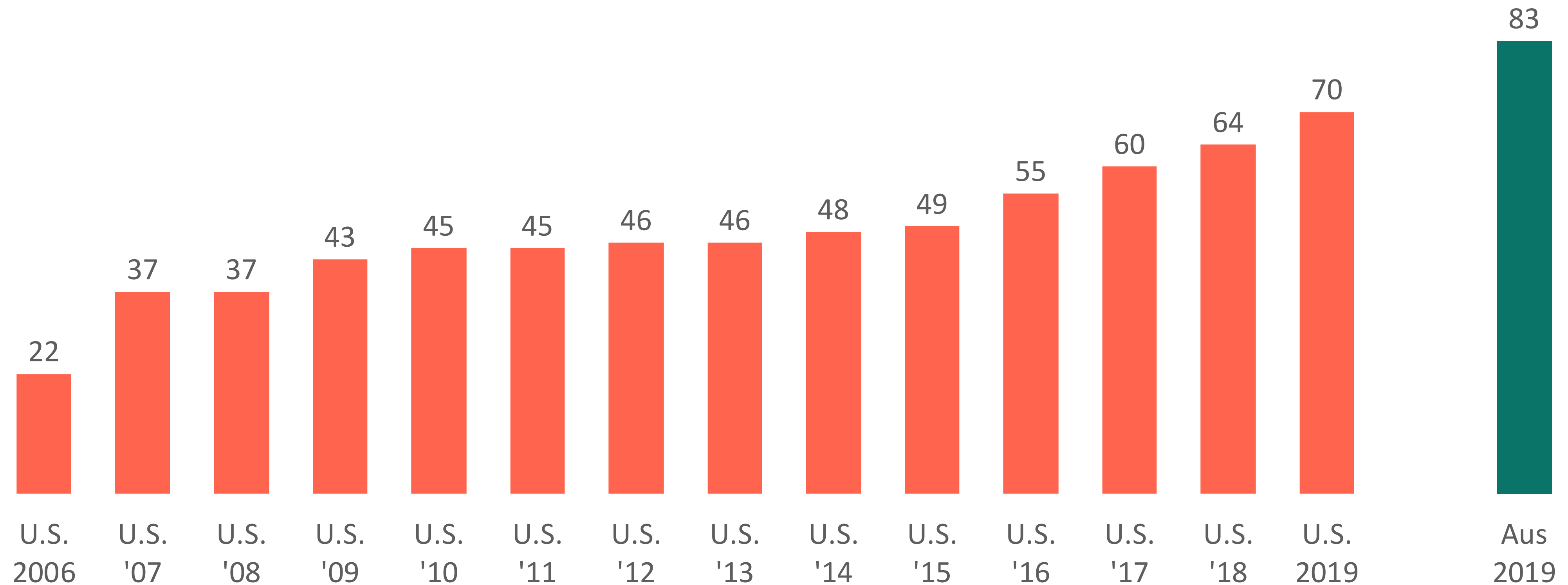
% AWARE OF PODCASTING



Podcasting Awareness

TOTAL POPULATION 12+

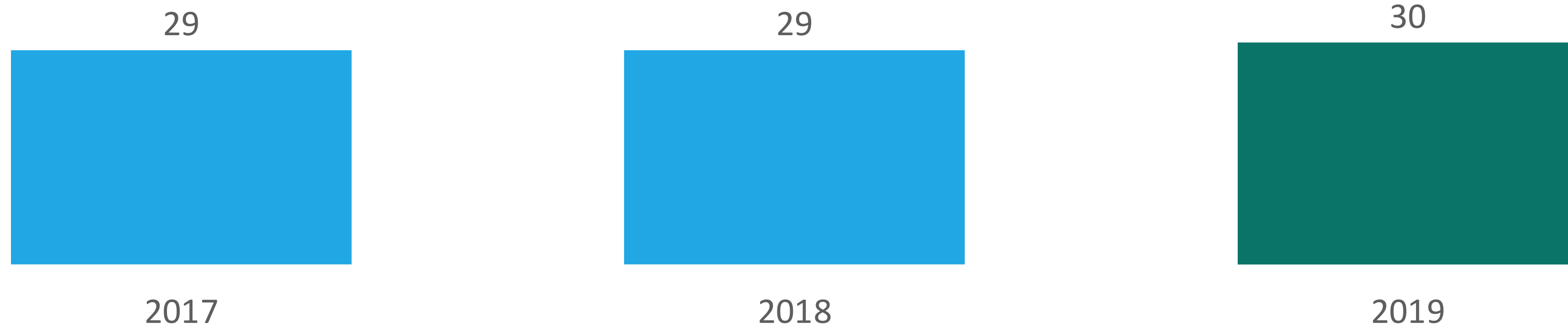
% AWARE OF PODCASTING



Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+

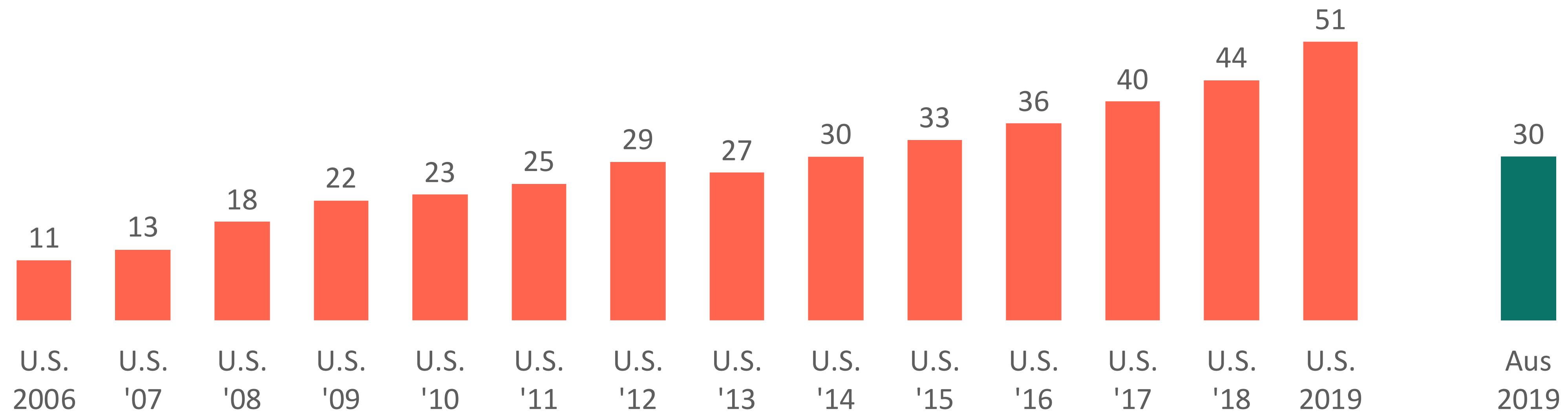
% EVER LISTENED TO A PODCAST



Podcast Listening

TOTAL POPULATION 12+

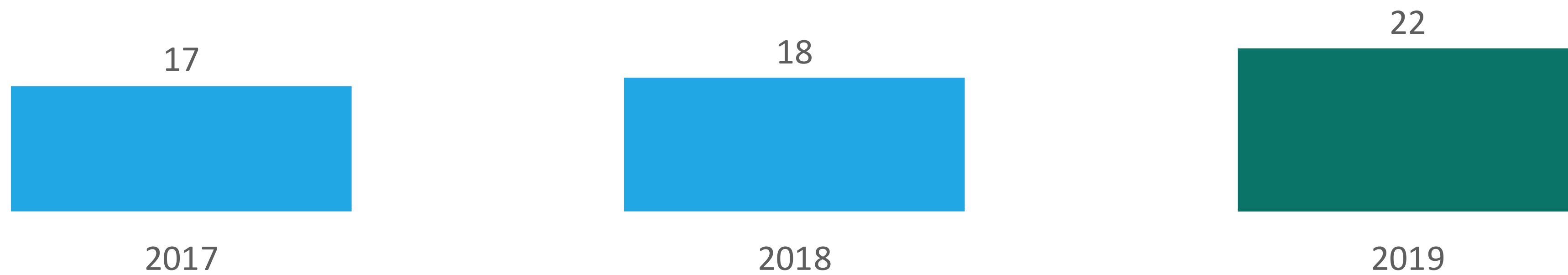
% EVER LISTENED TO A PODCAST



Monthly Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+

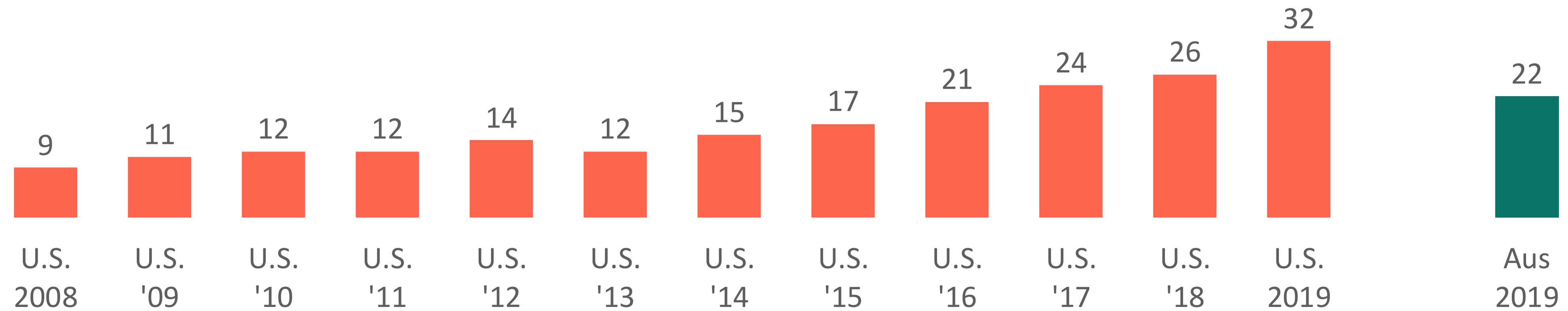
% LISTENED TO A PODCAST IN LAST MONTH



Monthly Podcast Listening

TOTAL POPULATION 12+

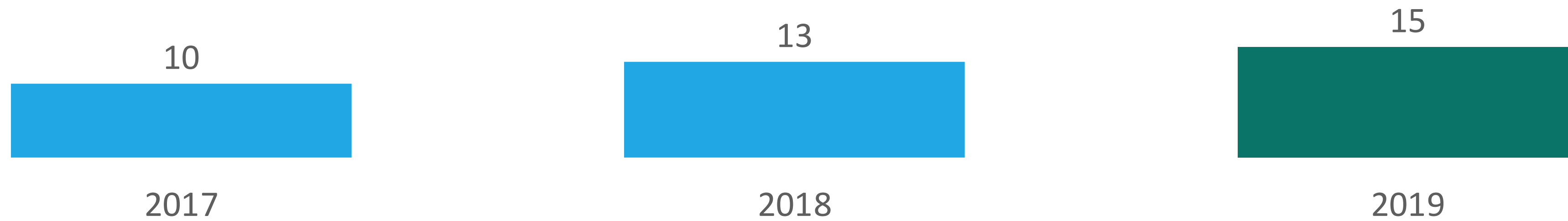
% LISTENED TO A PODCAST IN LAST MONTH



Weekly Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+

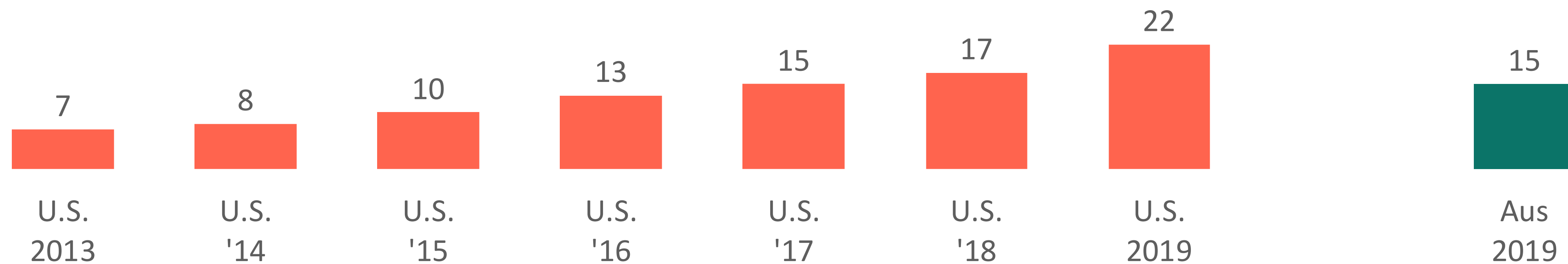
% LISTENED TO A PODCAST IN LAST WEEK



Weekly Podcast Listening

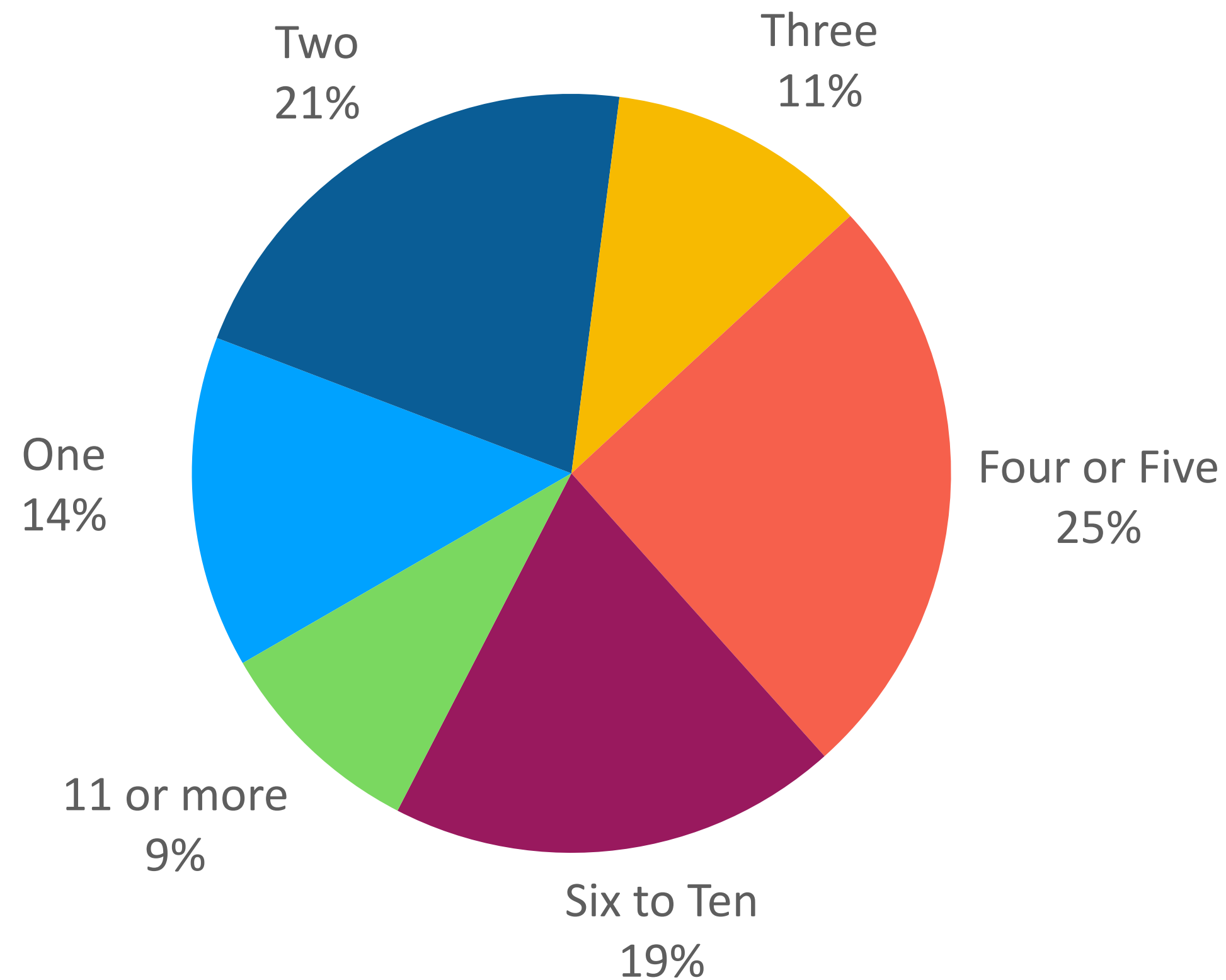
TOTAL POPULATION 12+

% LISTENED TO A PODCAST IN LAST WEEK



Number of Podcasts Listened to in Last Week

BASE: AUSTRALIAN 12+ AND LISTENED TO PODCAST IN LAST WEEK; 15%



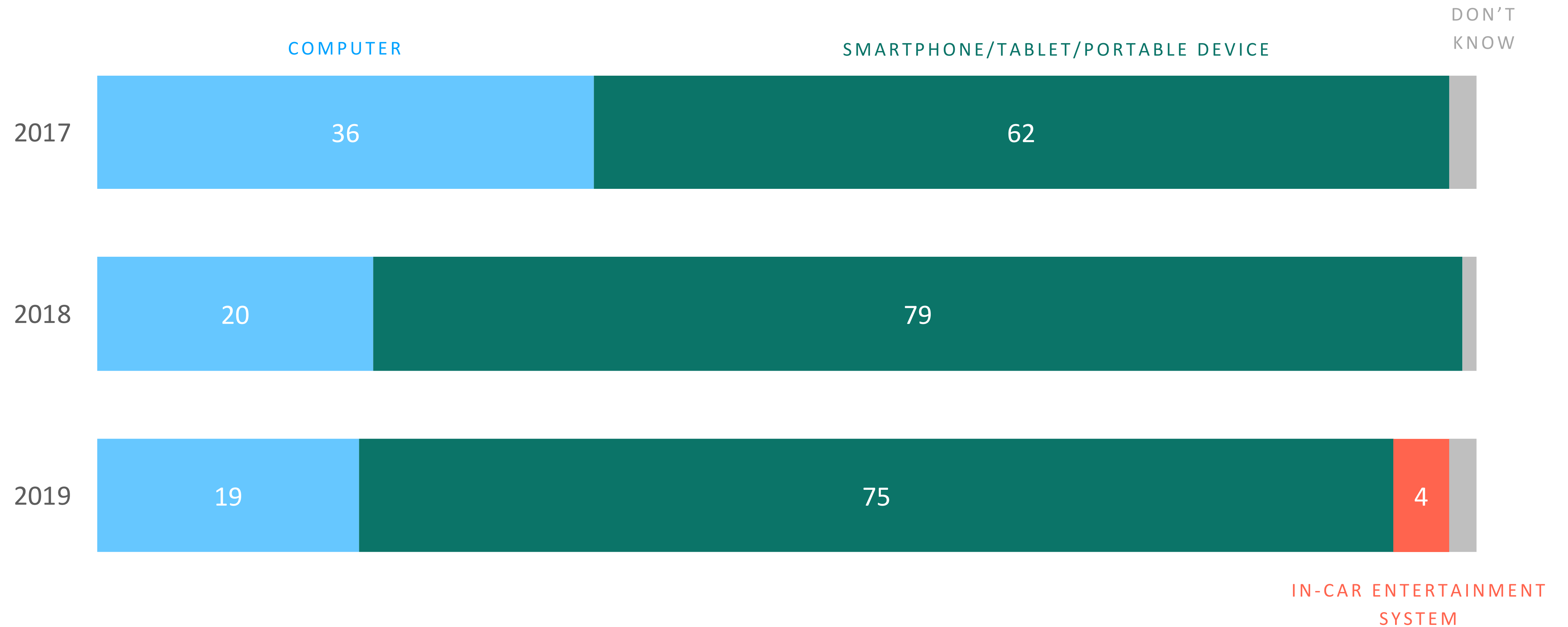
Australian weekly podcast listeners averaged

Six podcasts

in the last week

Device Used Most Often to Listen to Podcasts

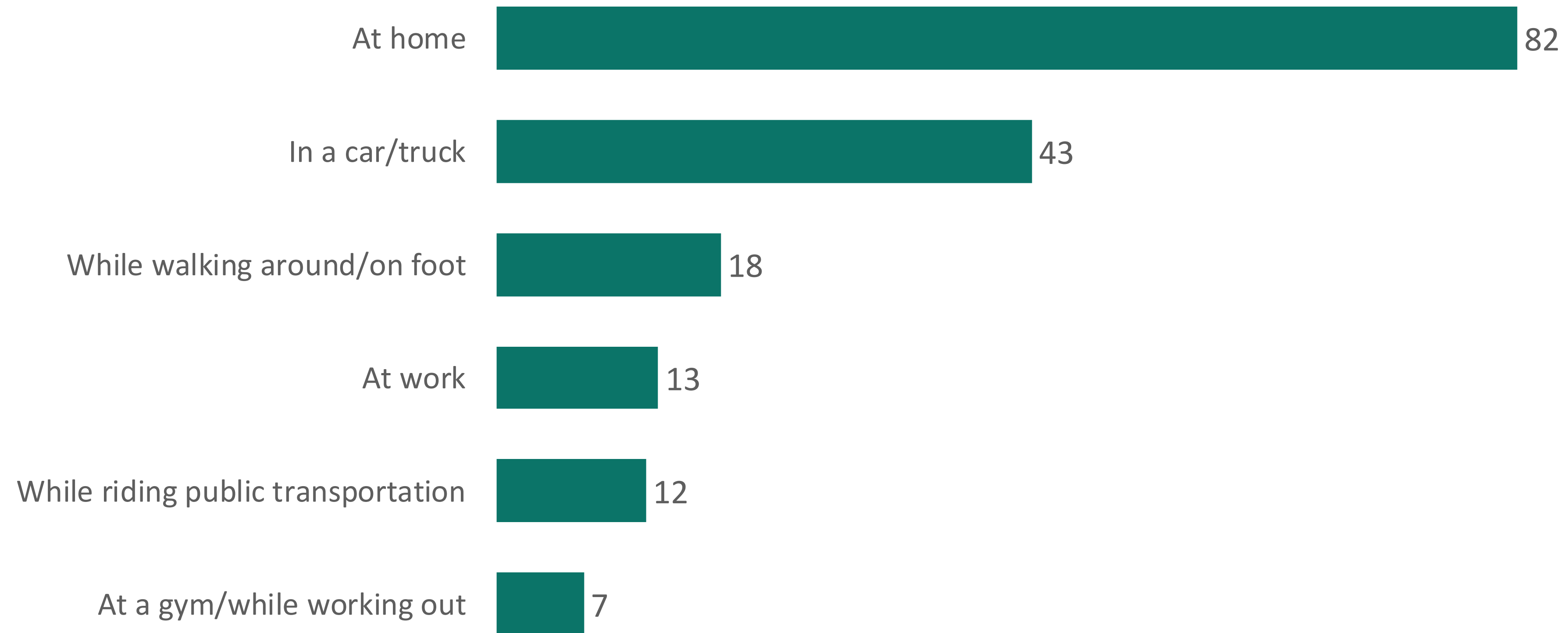
BASE: AUSTRALIAN 12+ AND EVER LISTENED TO A PODCAST; 30%



Podcast Listening Locations

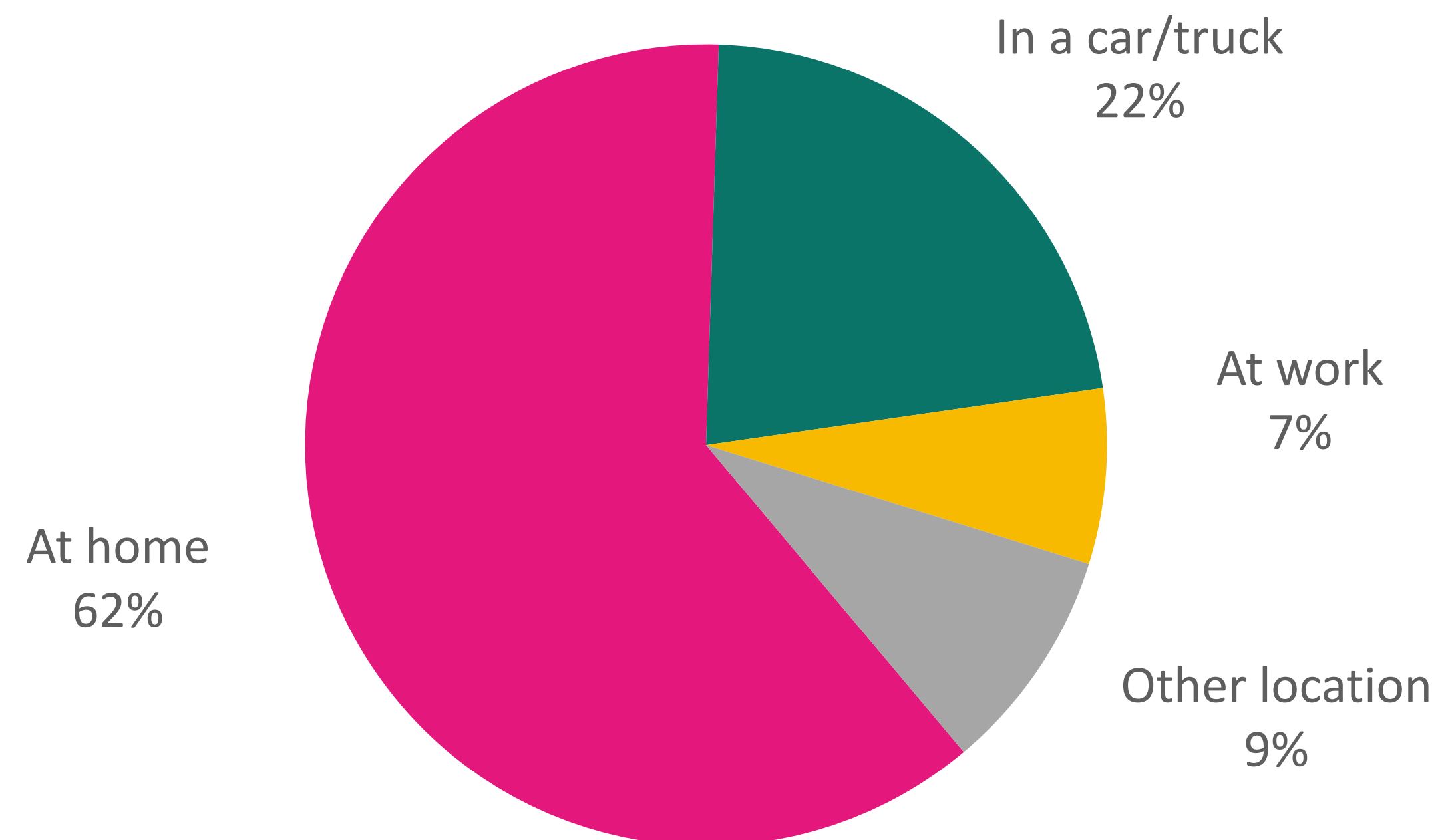
BASE: AUSTRALIAN 12+ AND EVER LISTENED TO A PODCAST; 30%

% LISTENED TO A PODCAST IN LOCATION



Location Where Podcasts are Listened to Most Often

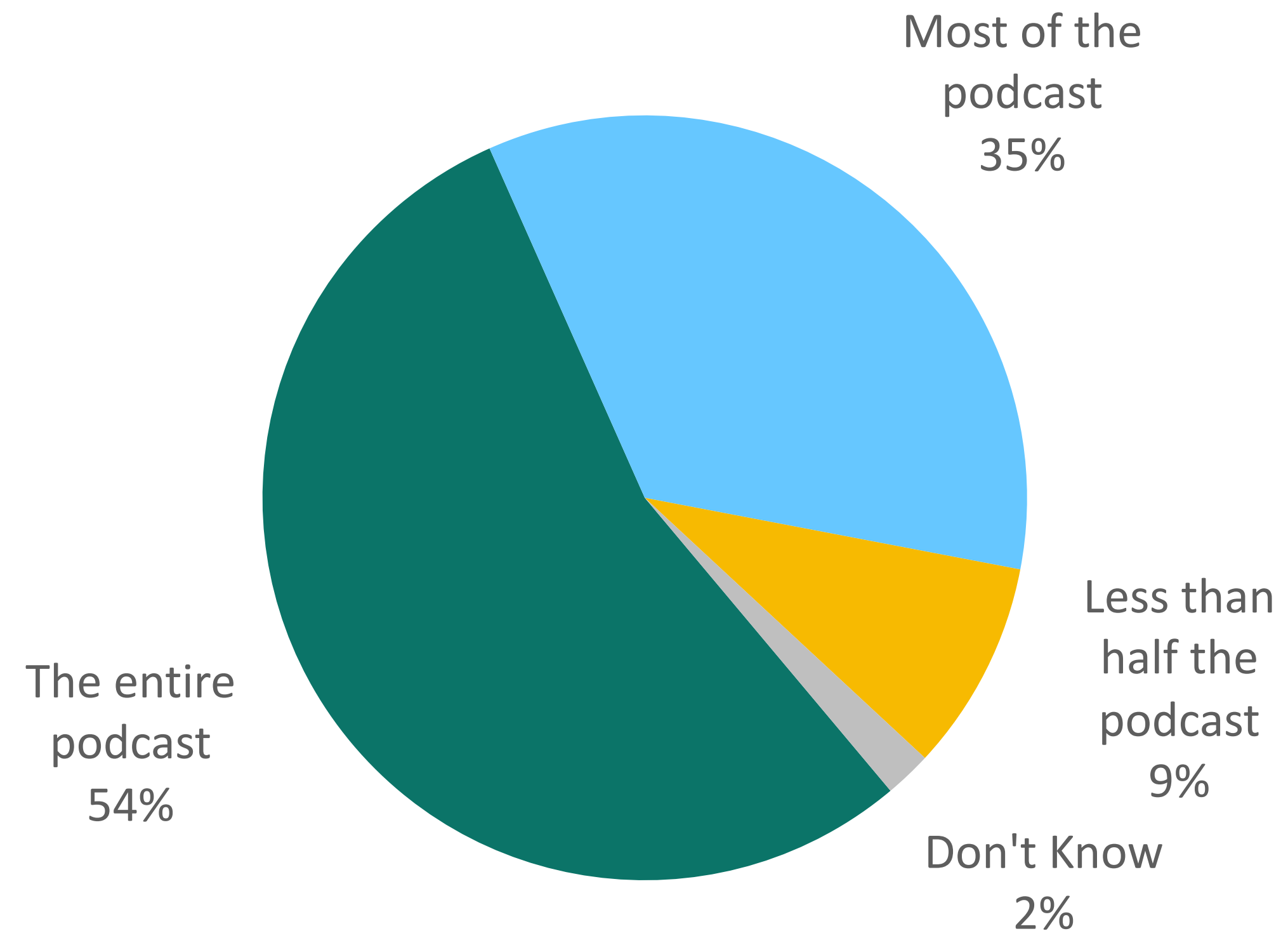
BASE: AUSTRALIAN 12+ AND EVER LISTENED TO A PODCAST; 30%



Amount of Podcast Episode Listened to

BASE: AUSTRALIAN 12+ AND EVER LISTENED TO A PODCAST; 30%

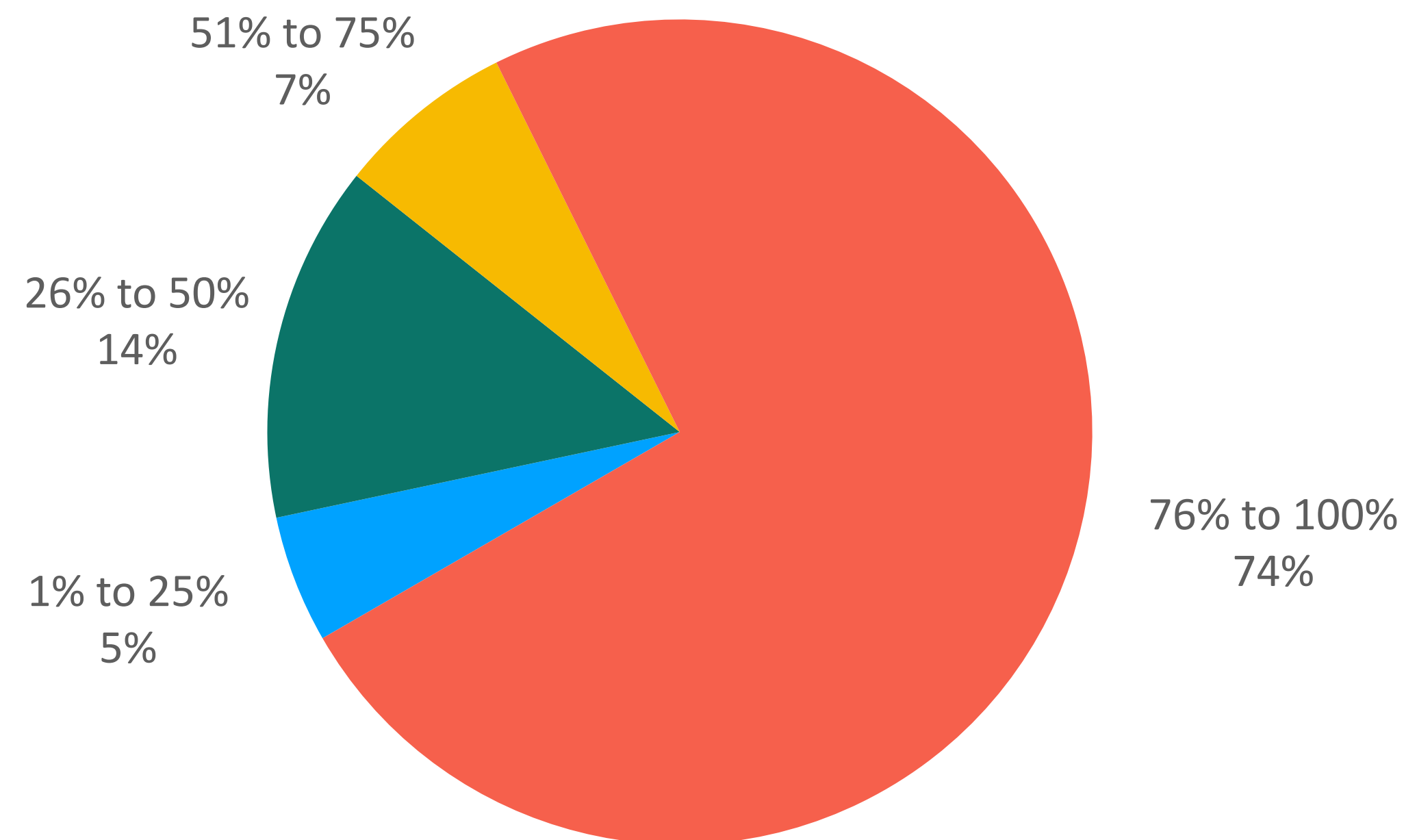
“Think about the audio podcast episodes you listen to. Do you typically listen to...?”



Percent of Podcasts Downloaded and Listened to

BASE: AUSTRALIAN 12+ AND EVER DOWNLOAD PODCASTS TO LISTEN LATER; 15%

“What percent of all the podcasts you download, out of 100 percent, would you say you typically listen to?”

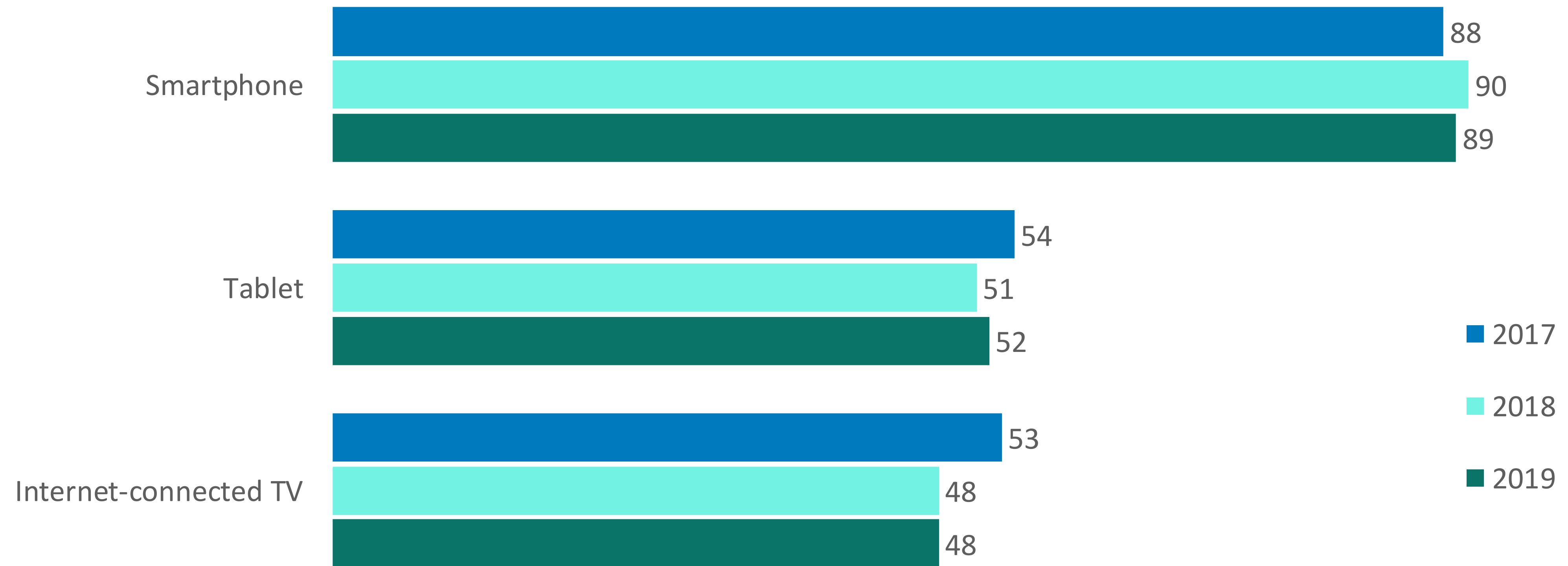


Devices & Technologies

Device Ownership

TOTAL AUSTRALIAN POPULATION 12+

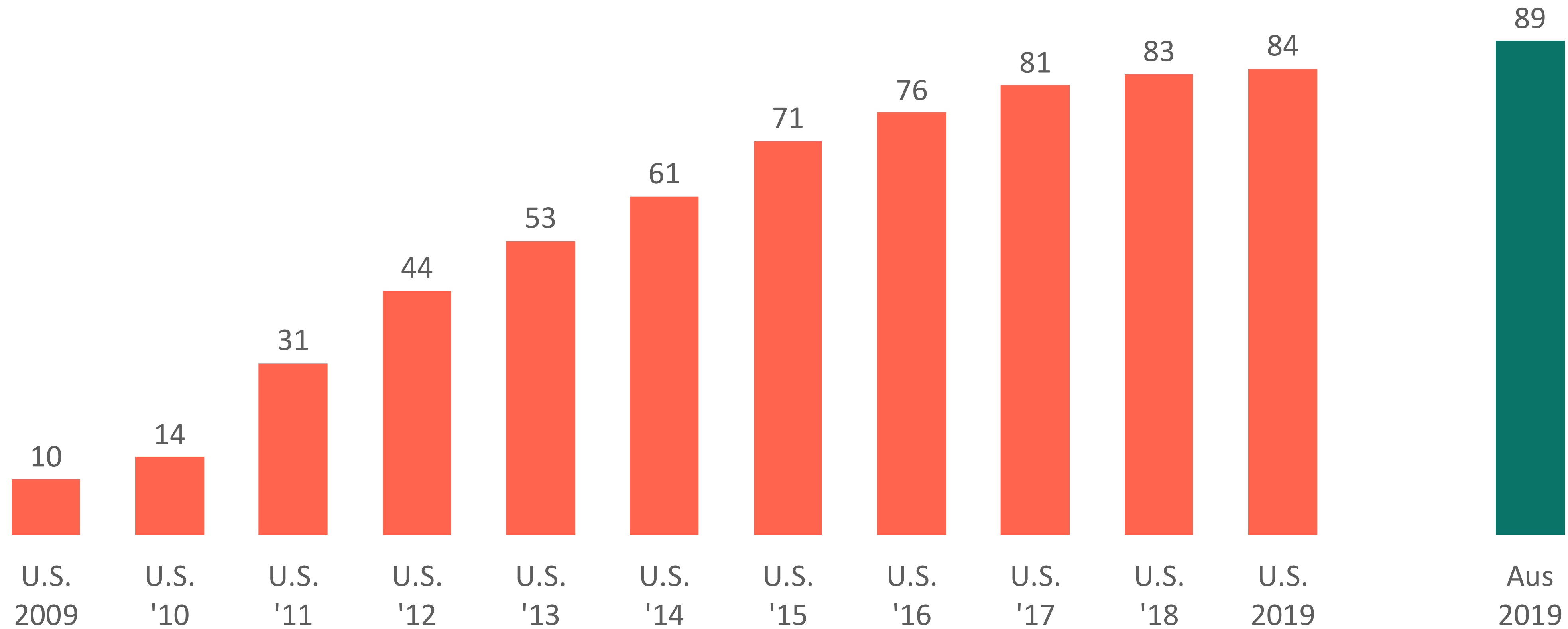
% OWNING DEVICE



Smartphone Ownership

TOTAL POPULATION 12+

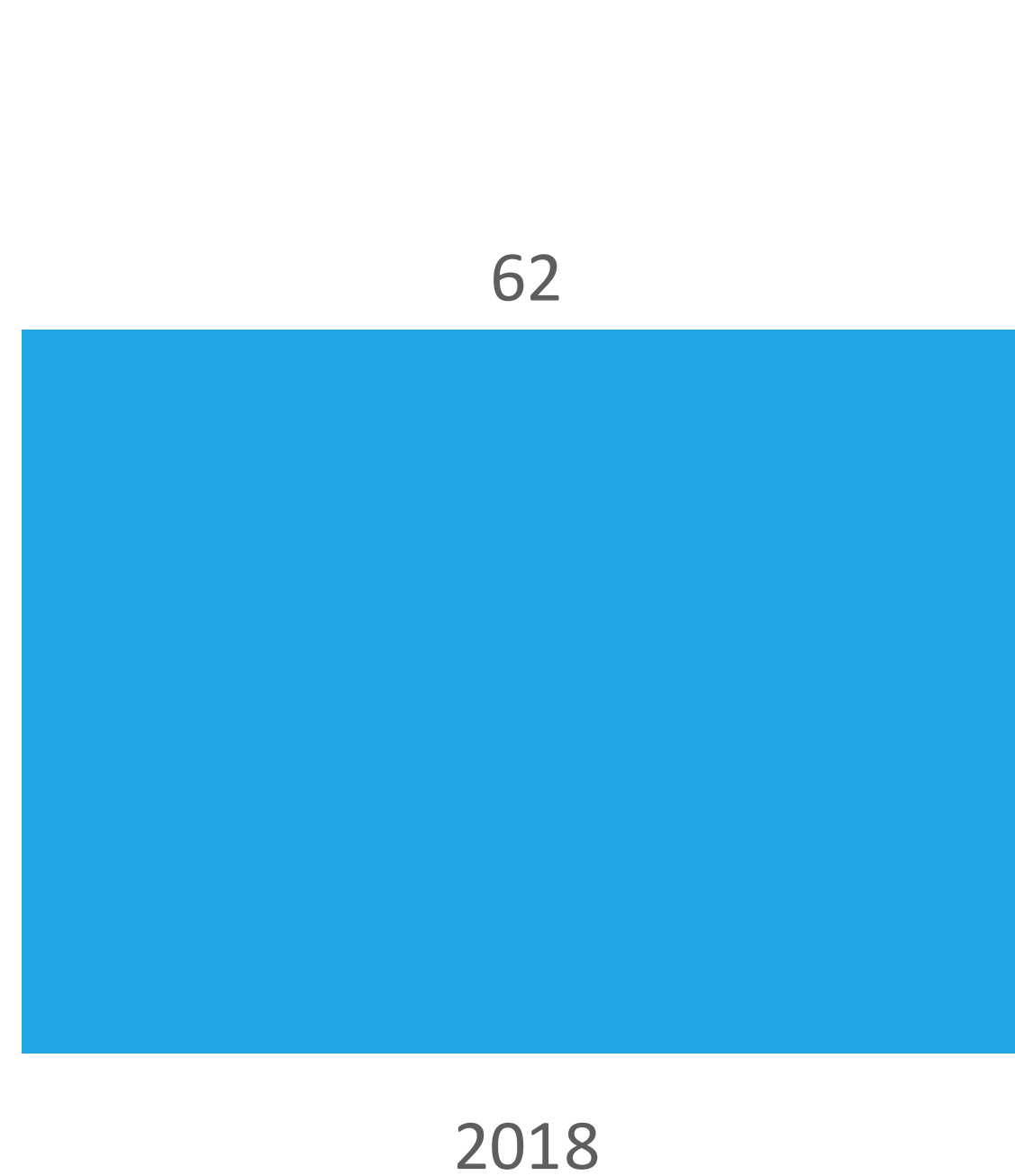
% OWNING A SMARTPHONE



Smart Speaker Awareness

TOTAL AUSTRALIAN POPULATION 12+

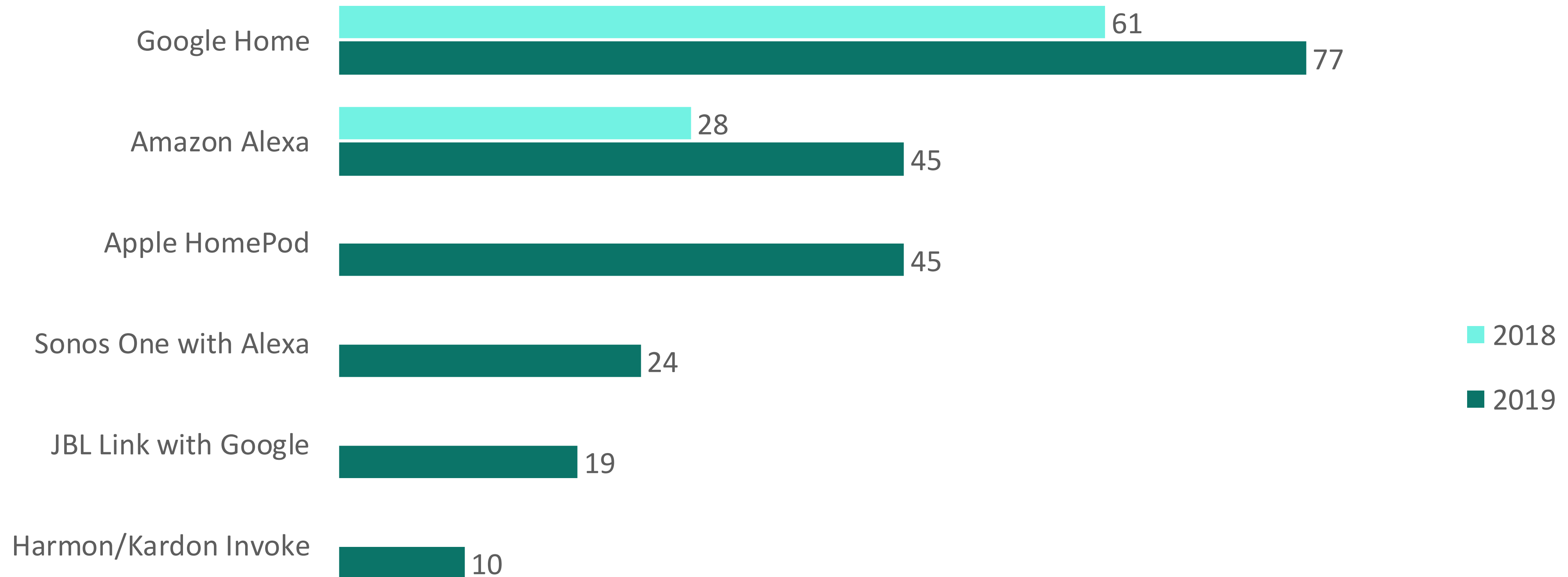
% AWARE OF ANY SMART SPEAKER BRAND



Smart Speaker Awareness

TOTAL AUSTRALIAN POPULATION 12+

% AWARE OF SMART SPEAKER BRAND

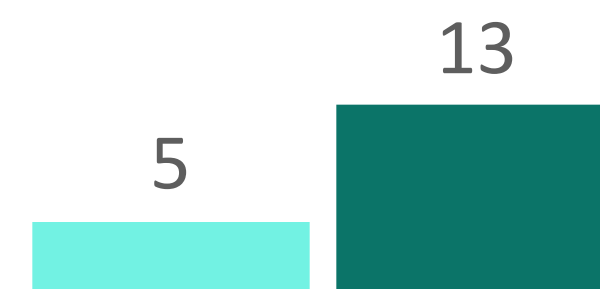


Smart Speaker Ownership

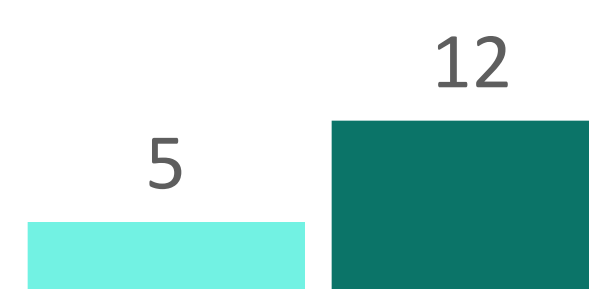
TOTAL AUSTRALIAN POPULATION 12+

% OWNING A SMART SPEAKER

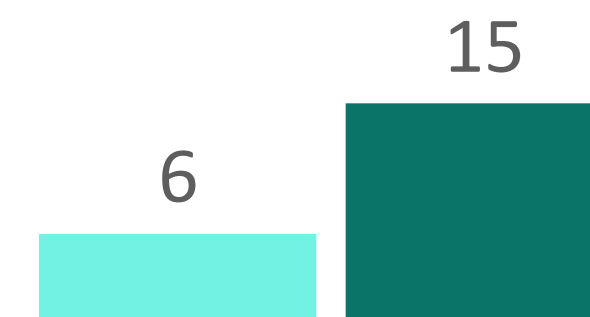
■ 2018 ■ 2019



Total 12+



Age 12-24



Age 25-54

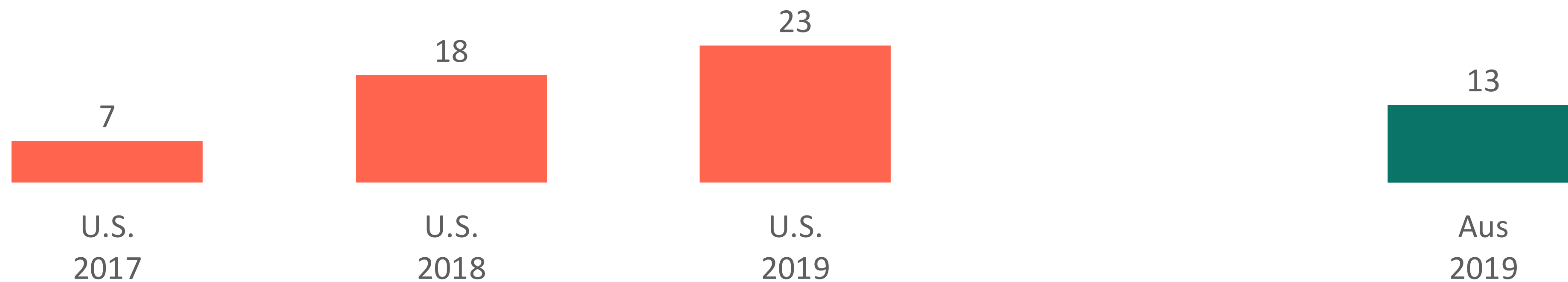


Age 55+

Smart Speaker Ownership

TOTAL POPULATION 12+

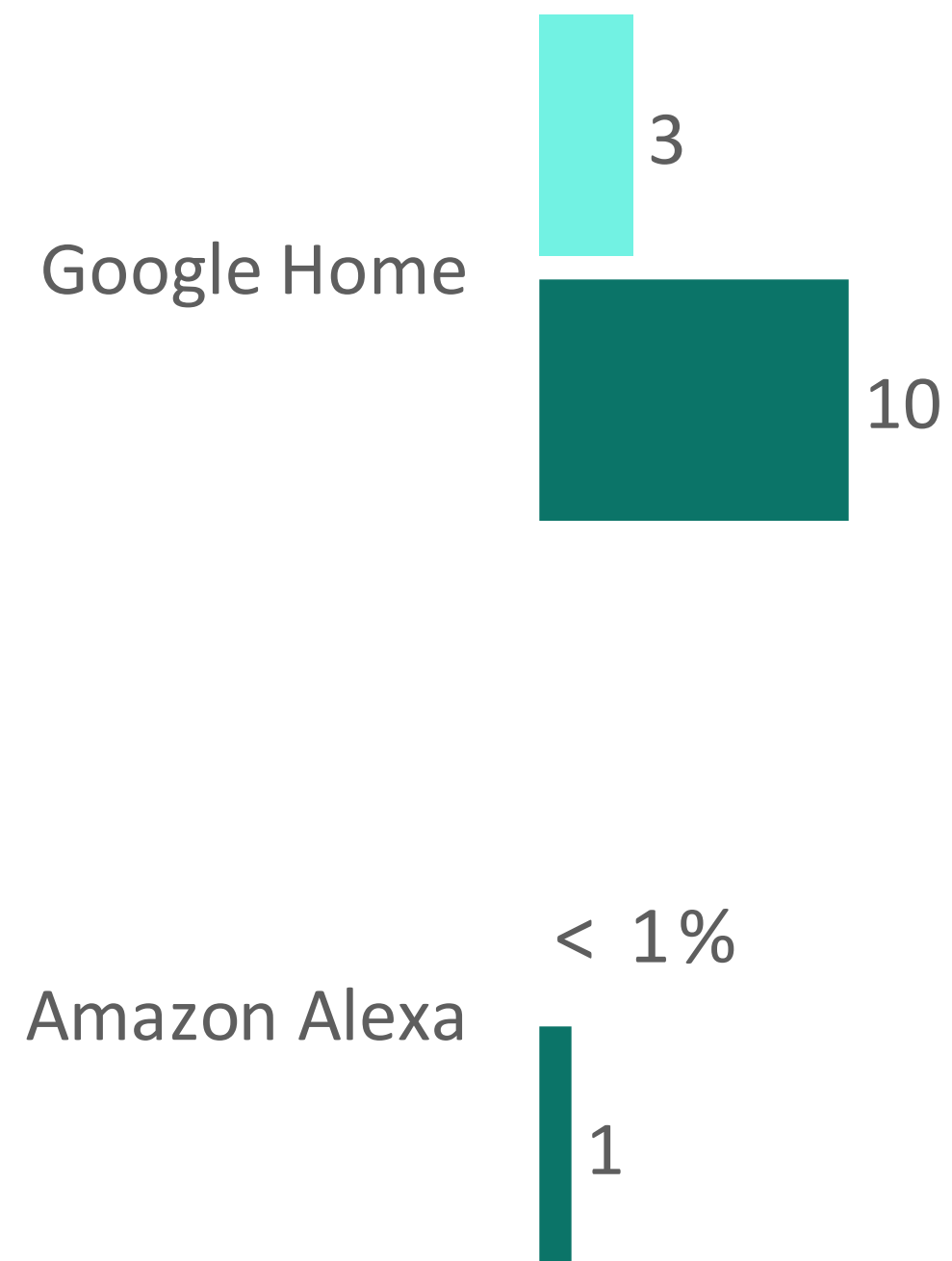
% OWNING A SMART SPEAKER



Smart Speaker Ownership

TOTAL AUSTRALIAN POPULATION 12+

% OWNING SMART SPEAKER BRAND

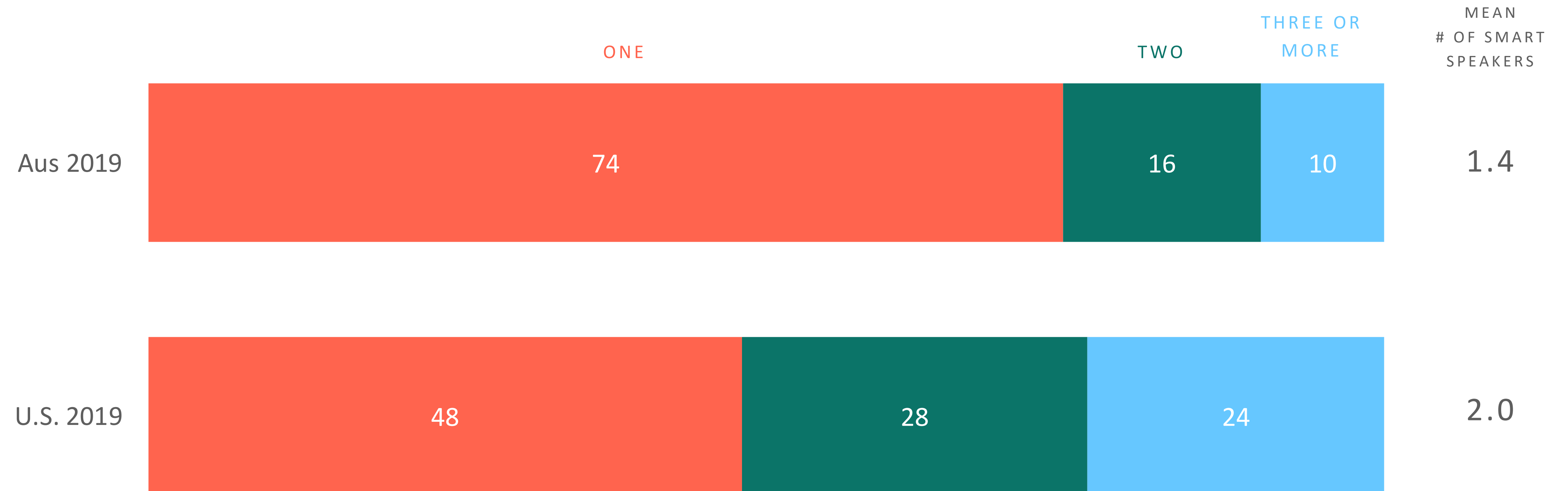


2018

2019

Number of Smart Speakers in Household

BASE: AGE 12+ SMART SPEAKER OWNERS



Observations

- The audio space is extremely dynamic today, creating opportunities and threats for all players

Observations

- The audio space is extremely dynamic today, creating opportunities and threats for all players
- Three of the “FAANG” companies are now actively working in Audio and Facebook is widely rumoured to be planning its entry

Observations

- AM/FM/DAB Radio remains strong and performs much more strongly than in America

Observations

- AM/FM/DAB Radio remains strong and performs much more strongly than in America
- Podcasting continues to grow but lags in comparison to trends from the USA

Observations

- AM/FM/DAB Radio remains strong and performs much more strongly than in America
- Podcasting continues to grow but lags in comparison to trends from the USA
- Smart speakers represent an exciting new pathway for audio consumption

 THE INFINITE DIAL® 2019

The Infinite Dial 2019 Australia

#InfiniteDial



#InfiniteDial