

THE INFINITE DIAL[®] 2024

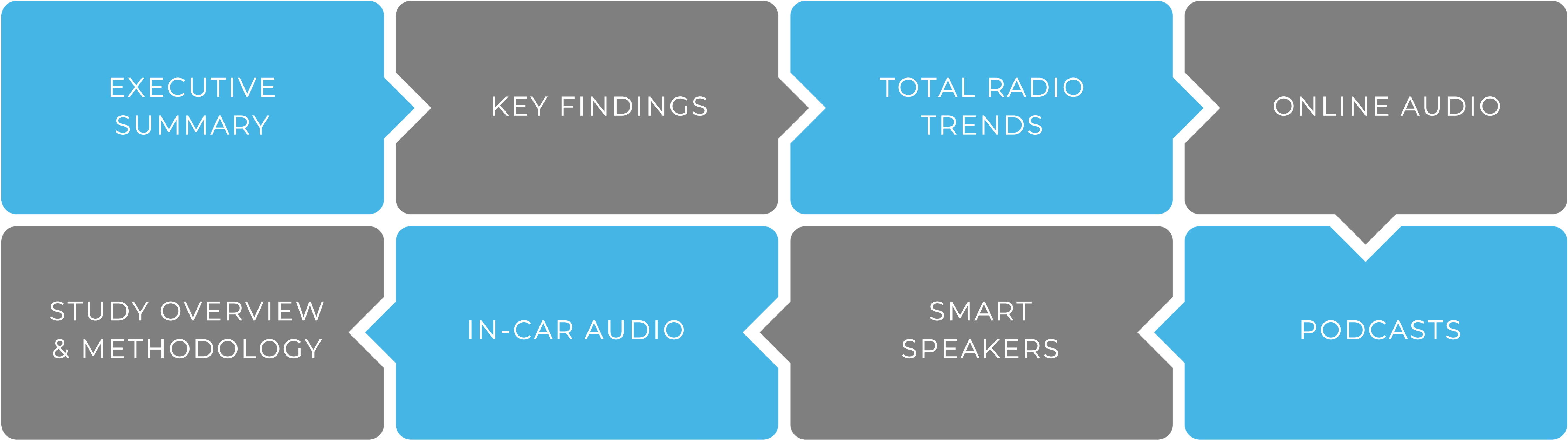
Australia



#InfiniteDial

THE INFINITE DIAL © 2024 EDISON RESEARCH

Presentation Outline



Executive Summary // TL;DR

The Infinite Dial Australia 2024 study by Edison Research confirms that Australian audio consumption remain strong, with radio significantly outperforming the US market. The study reveals continuous growth in online and digital audio platforms, indicating a dynamic and evolving audio landscape.

- Radio reaches 81% of the population; 27% higher than the US.
- Five times more Australians listen to radio than ad-supported Spotify.
- Online streaming among 25-54-year-olds has doubled in three years.
- Podcast listenership increased by 20% in two years, leading globally.
- Radio is the top in-car content choice, with a 76% higher listening rate than other sources.
- Streaming radio listening in cars rose by 75% in two years.
- Smart speaker ownership doubled in four years, now matching the US.

#InfiniteDial

KEY FINDINGS

Radio's Resilience

94%

Listen to Total Audio

81%

Listen to Total Radio (Broadcast + Streaming)

77%

Watch live free-to-air TV

77%

Use streaming video services

52%

Watch on-demand free-to-air TV

39%

Ad-supported music streaming

% CONSUMING MEDIUM IN LAST WEEK
BASE: AUSTRALIAN POPULATION 12+



Ad-Supported Audio: Challenges and Opportunities

Only **33%** of Spotify
listeners can be reached
by audio ads within
Spotify's music service

81%

Total Radio

5X MORE AUSTRALIANS ARE LISTENING TO
RADIO THAN AD-SUPPORTED SPOTIFY.

16%

Ad-supported
Spotify

4
Million

27%

Online/
Live-streamed
Radio

6
Million

18
Million

% LISTENED TO AUDIO SOURCE IN THE LAST WEEK
Base: Australian Population 12+

Surge in Weekly Online Radio Listening Among Adults 25-54



% LISTENED TO AM/FM/DAB+ RADIO ONLINE IN THE LAST WEEK
Base: Australian Population 25-54

Oh, my Pod!



Driving Tunes: The Top Audio Sources in Cars

88%

Total Radio

Music Streaming*

50%

Podcasts

37%

CDs 30%

Downloaded Music

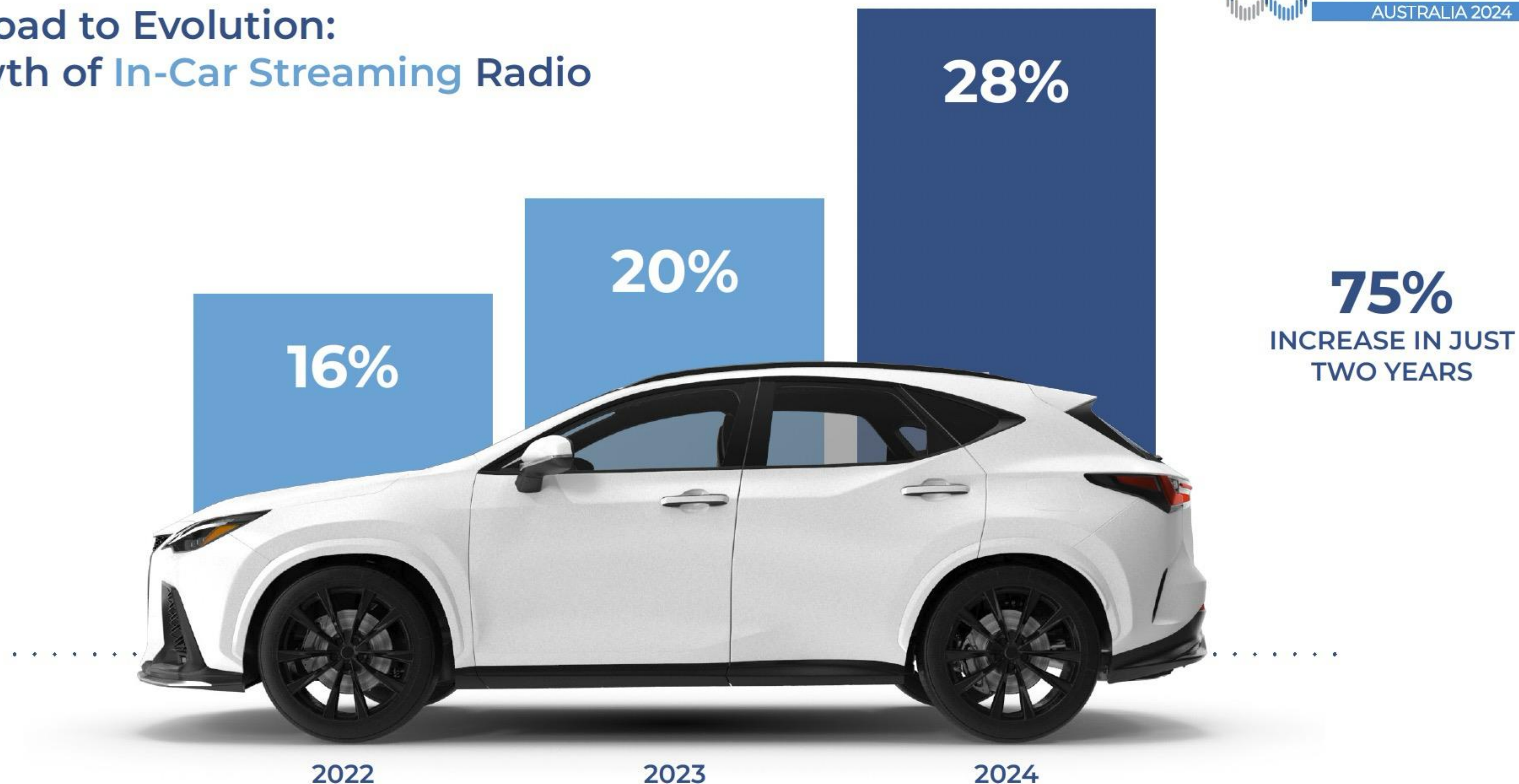
18%

% USING AUDIO SOURCE IN CAR

BASE: AUSTRALIANS AGE 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 84%

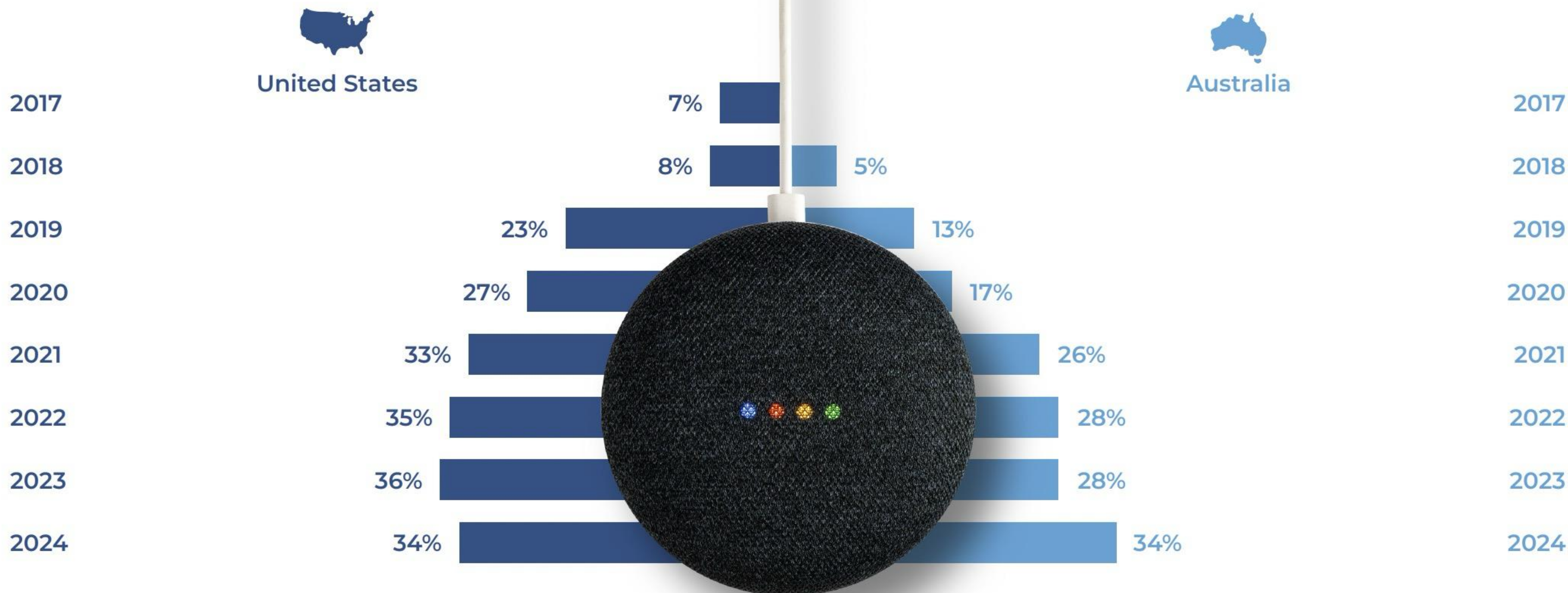
*such as Spotify, YouTube Music, or Apple Music

On the Road to Evolution: The Growth of In-Car Streaming Radio



% LISTENING TO STREAMING RADIO IN CAR
BASE: AUSTRALIAN AGE 18+, DRIVEN/RIDDEN IN CAR IN LAST MONTH,
AND LISTEN TO ANY AUDIO IN THE CAR; 82%

Rising Trend: The Growth of Smart Speaker Ownership



% OWNING A SMART SPEAKER
BASE: POPULATIONS 12+

TOTAL RADIO TRENDS

Radio's Resilience

94%

Listen to Total Audio

81%

Listen to Total Radio (Broadcast + Streaming)

77%

Watch live free-to-air TV

77%

Use streaming video services

52%

Watch on-demand
free-to-air TV

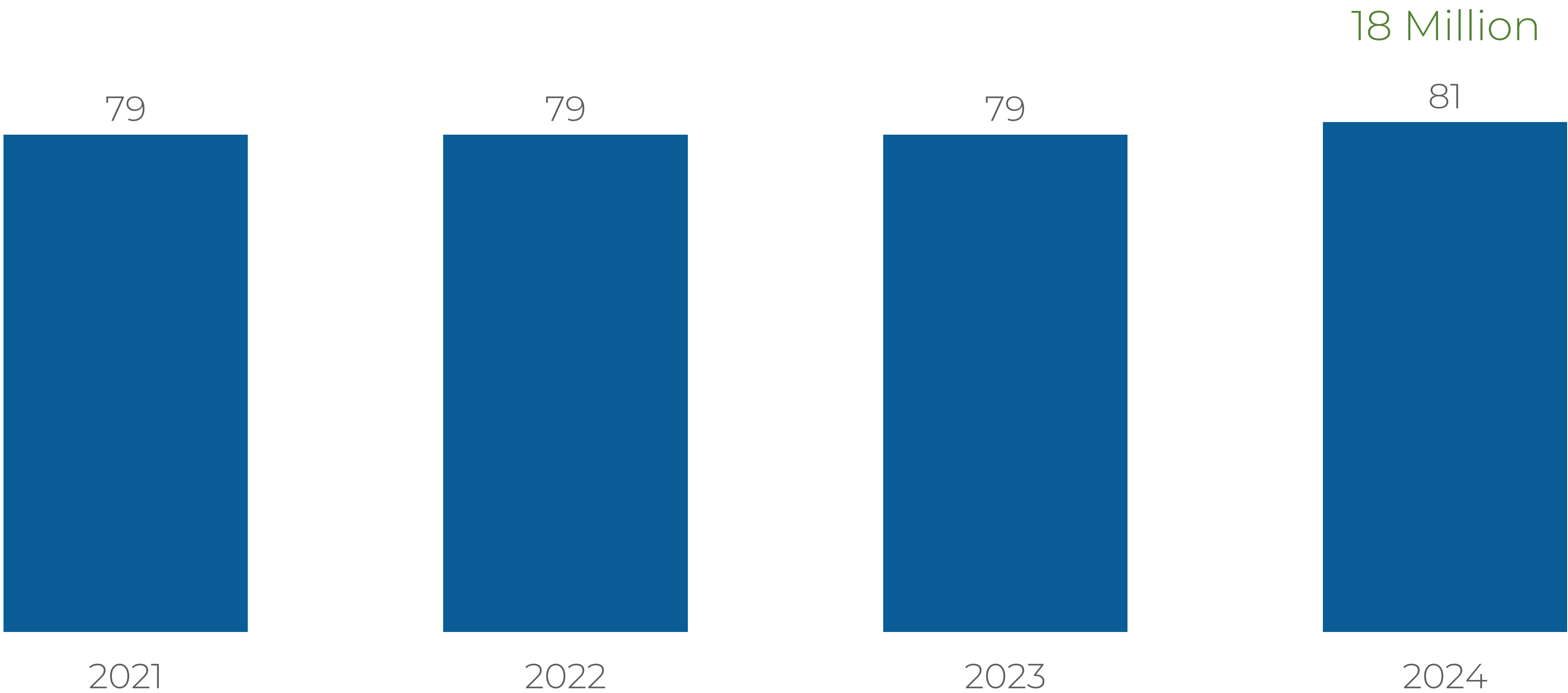
39%

Ad-supported
music streaming

% CONSUMING MEDIUM IN LAST WEEK
BASE: AUSTRALIAN POPULATION 12+

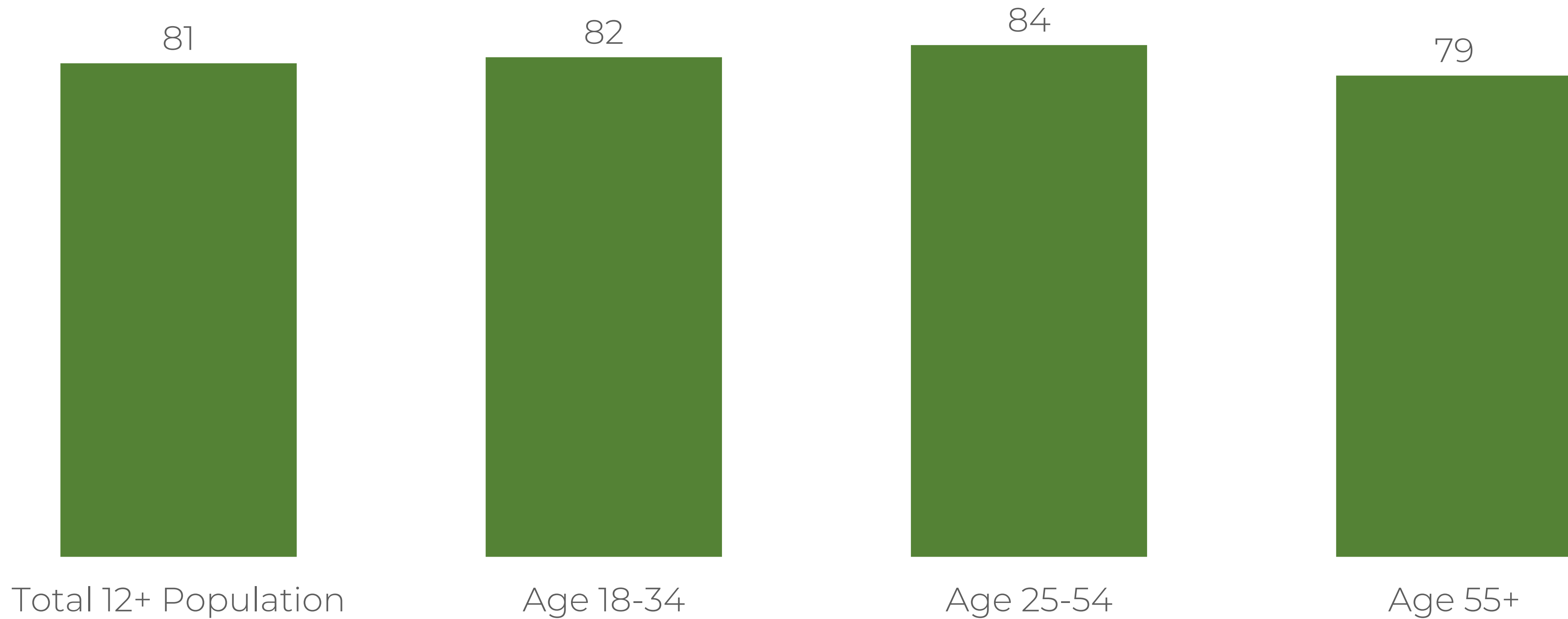


Radio's Resilience



% LISTENED TO AM/FM/DAB+ RADIO ON-AIR OR ONLINE IN THE LAST WEEK
BASE: AUSTRALIAN POPULATION 12+

Radio's Broad Appeal



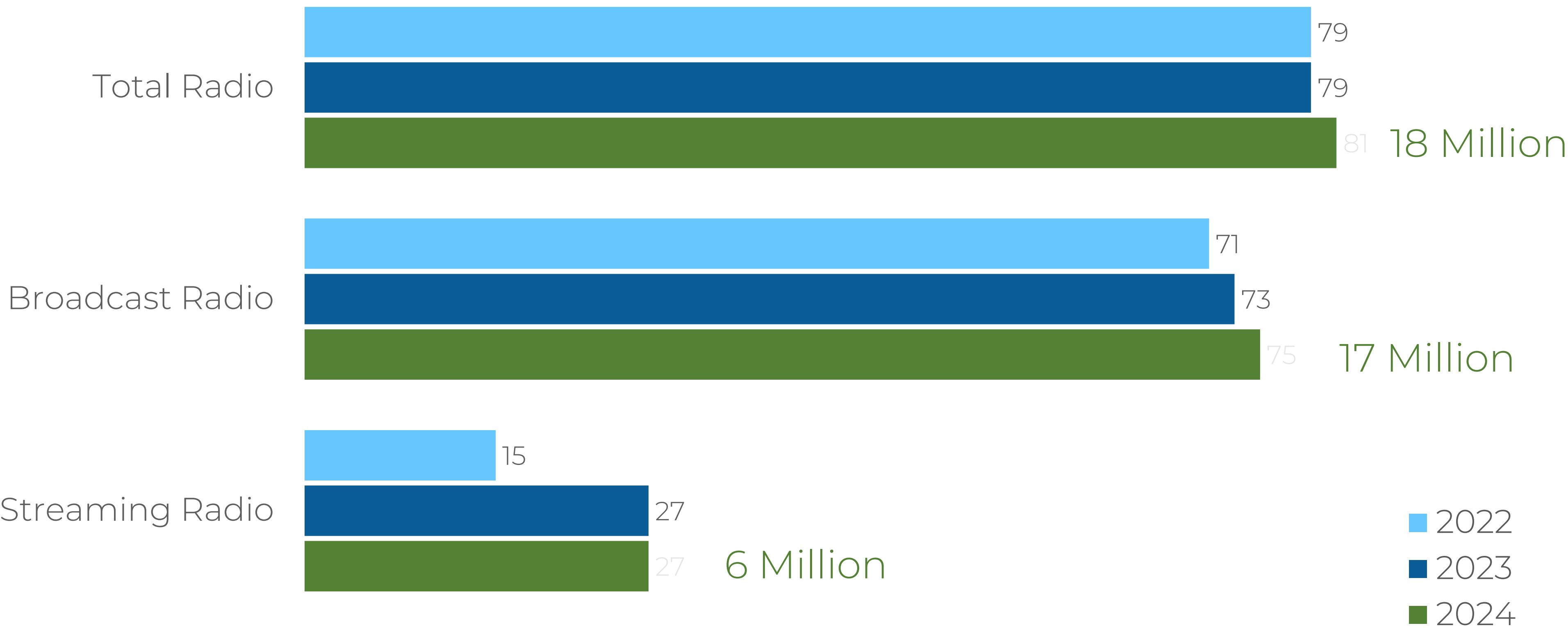
% LISTENED TO AM/FM/DAB+ RADIO ON-AIR OR ONLINE IN THE LAST WEEK
BASE: AUSTRALIAN POPULATION 12+

On Top Down Under Australian Radio reaches 27% more of the population than the US



% LISTENED TO AM/FM/DAB+ RADIO ON-AIR OR ONLINE IN THE LAST WEEK
BASE: POPULATIONS 12+

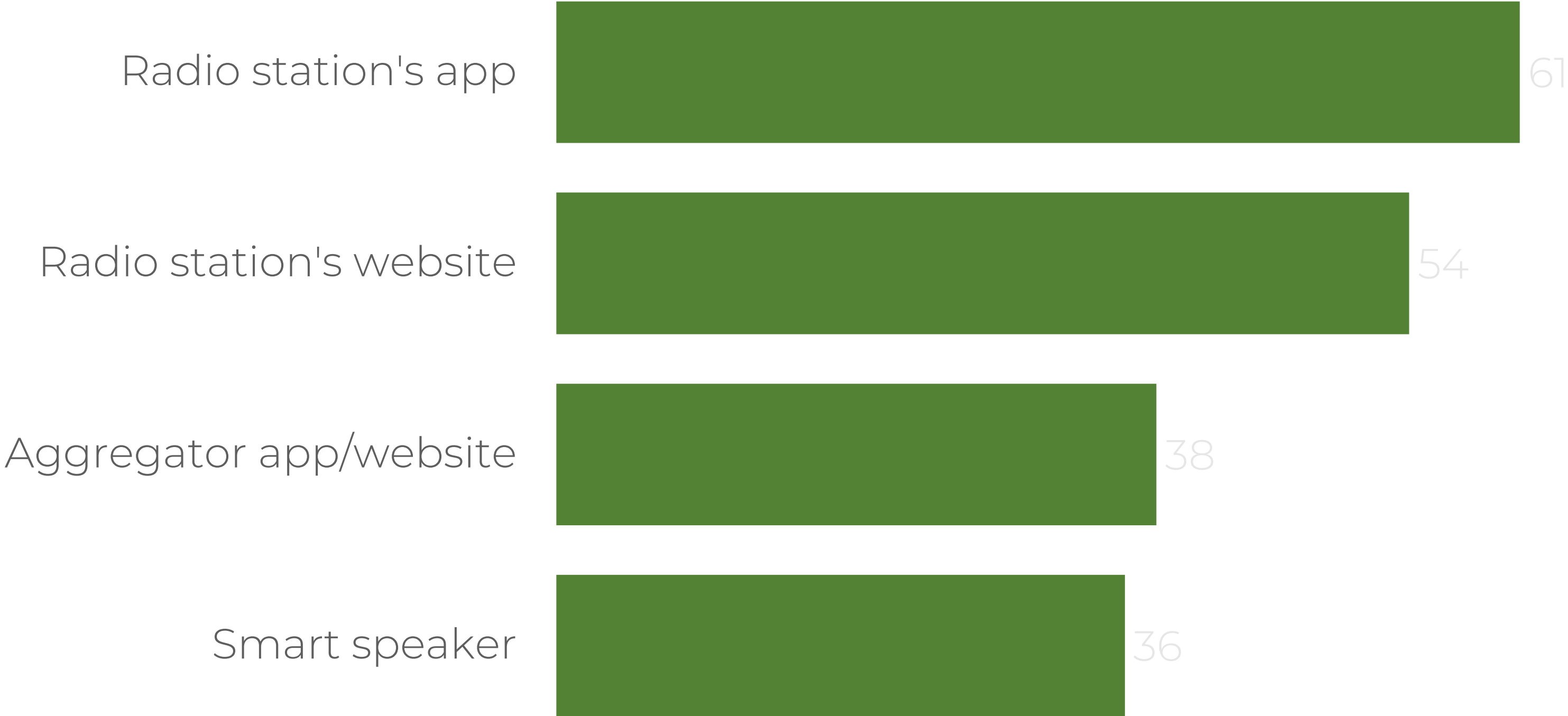
BROADCAST RADIO RESILIENT AS ONLINE GROWS



% LISTENED TO AM/FM/DAB+ RADIO ON-AIR OR ONLINE IN THE LAST WEEK, BY SOURCE
BASE: POPULATIONS 12+

I Have a Stream....

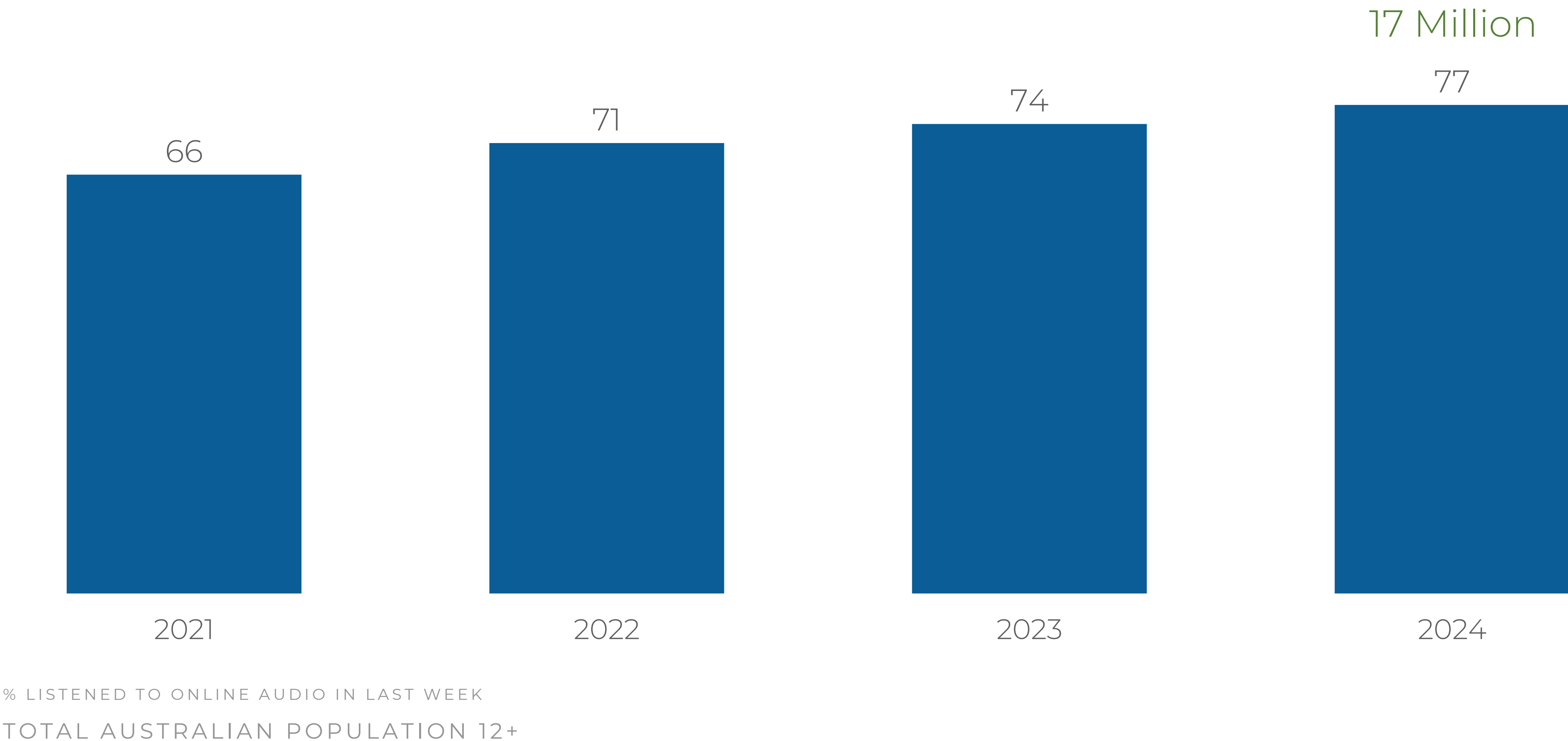
Radio Apps and Websites the most common way to listen online



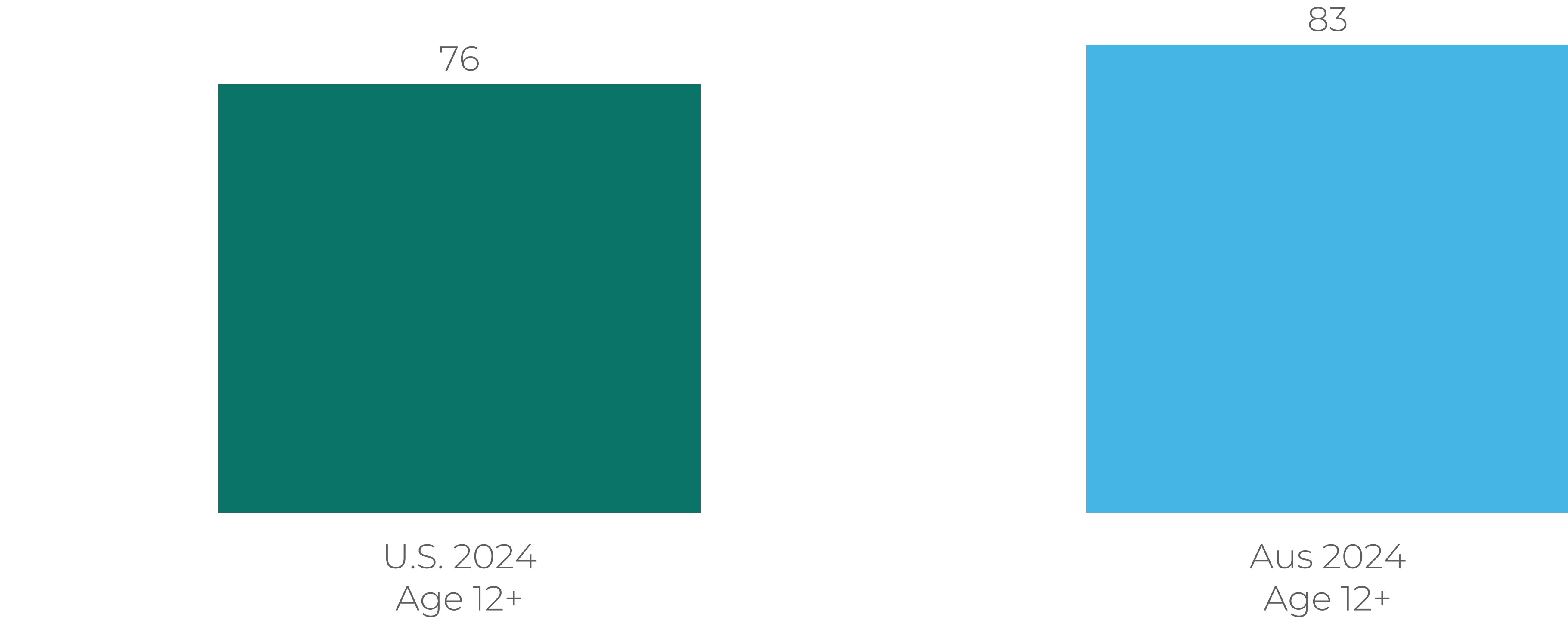
% USING SOURCE TO LISTEN TO AM/FM/DAB+ RADIO
BASE: AUSTRALIAN AGE 12+ AND LISTEN TO ONLINE AM/FM/DAB+ RADIO IN THE LAST WEEK; 27%

Online Audio

Online Audio listening on the increase



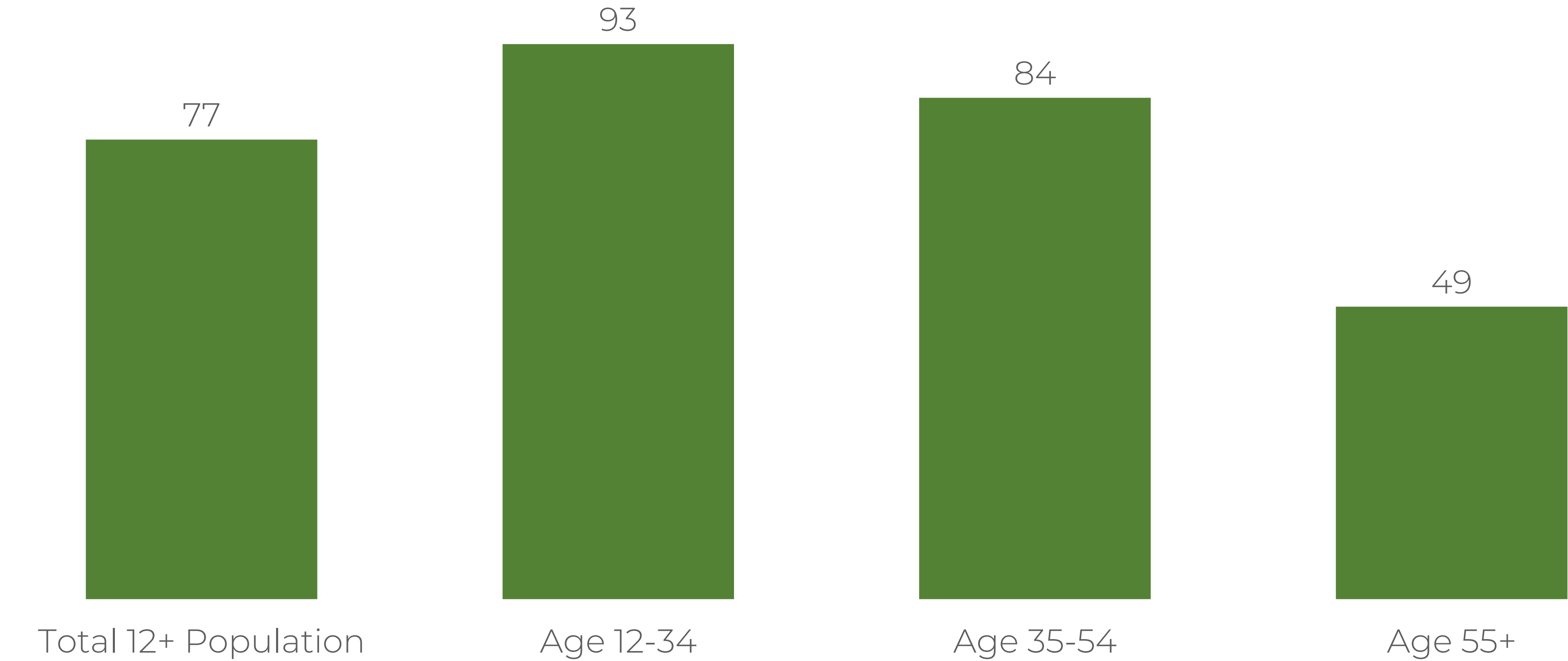
Australia is ahead of the US by 9% in online listening



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

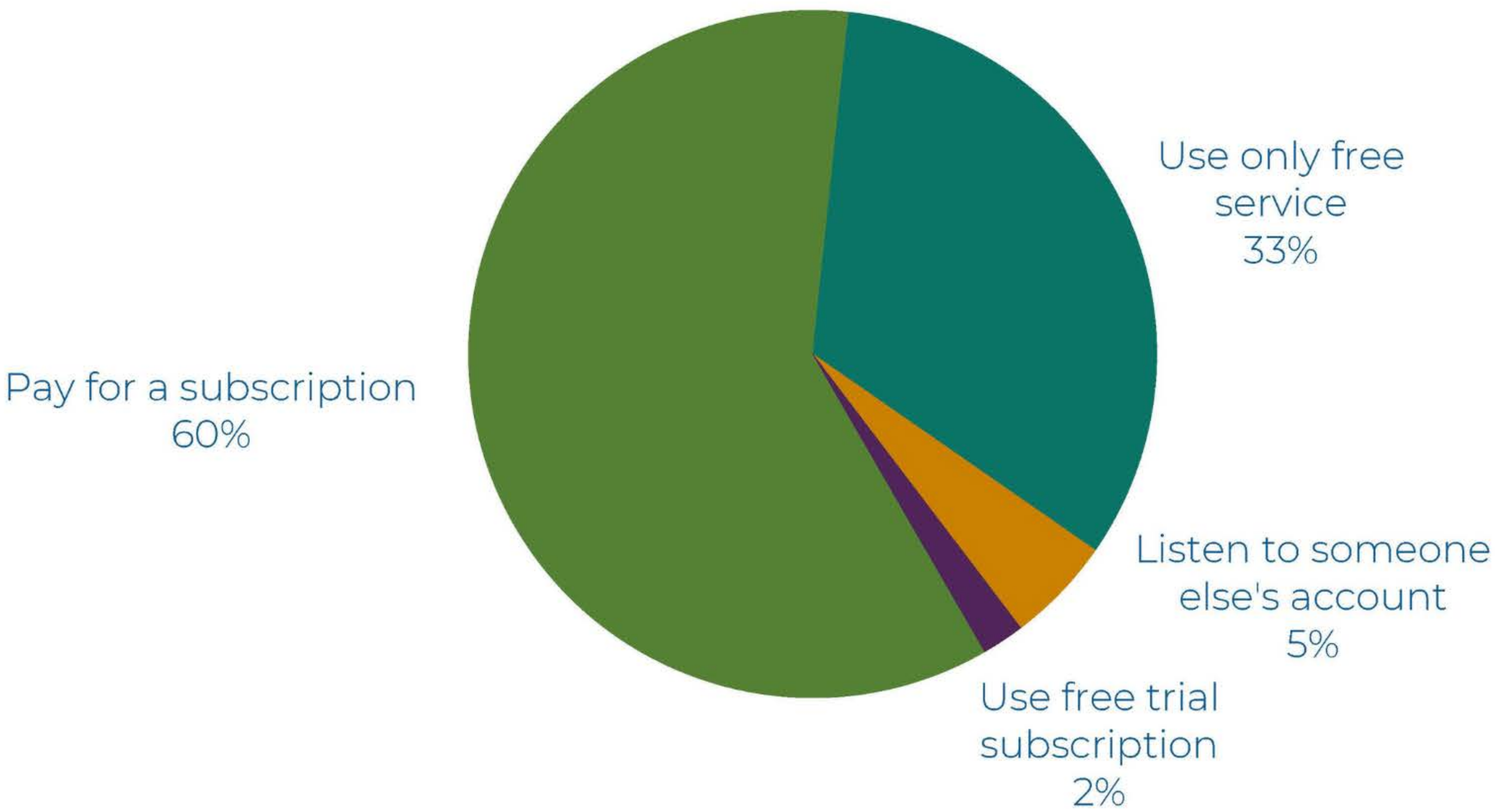
TOTAL AUSTRALIAN POPULATION 12+
% LISTENED TO ONLINE AUDIO IN LAST MONTH

Weekly Online Audio Listening



% LISTENED TO ONLINE AUDIO IN LAST WEEK
TOTAL AUSTRALIAN POPULATION 12+

Free vs. Paid Subscriptions to Spotify



Only a third of Spotify listeners can be reached by audio ads within Spotify's music service

BASE: AUSTRALIANS AGE 12+ AND LISTENED TO SPOTIFY IN LAST WEEK; 50%

Ad-Supported Audio: Challenges and Opportunities

Only **33%** of Spotify
listeners can be reached
by audio ads within
Spotify's music service

81%

Total Radio

5X MORE AUSTRALIANS ARE LISTENING TO
RADIO THAN AD-SUPPORTED SPOTIFY.

16%

Ad-supported
Spotify

4
Million

27%

Online/
Live-streamed
Radio

6
Million

18
Million

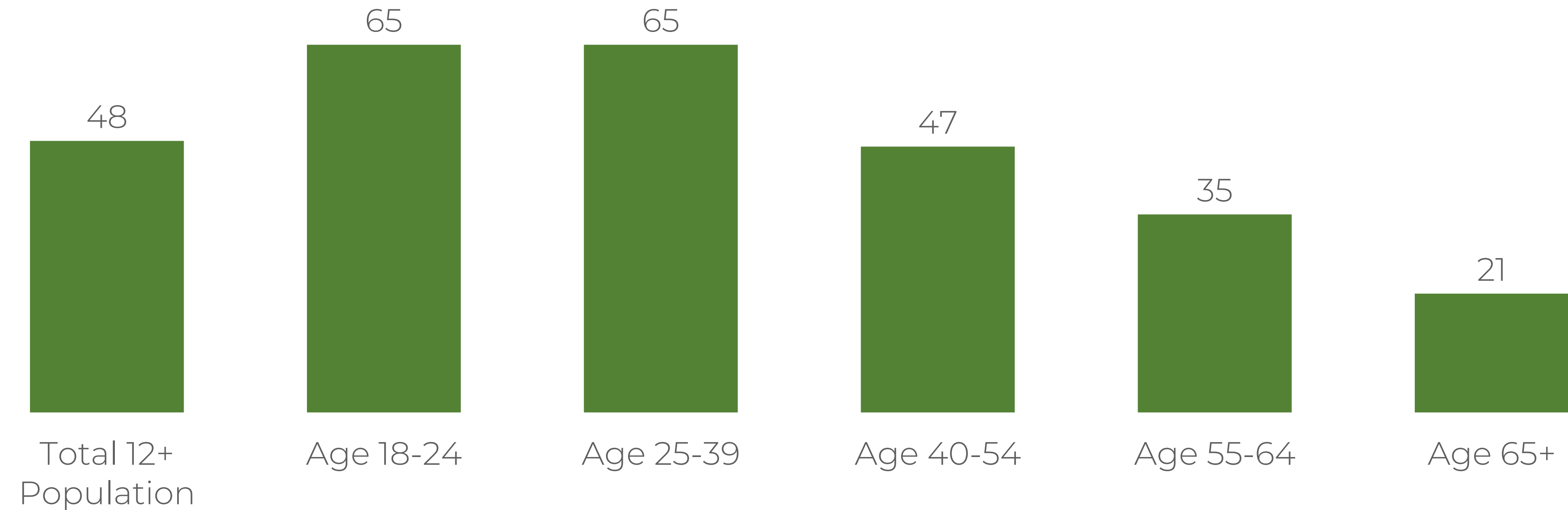
% LISTENED TO AUDIO SOURCE IN THE LAST WEEK
Base: Australian Population 12+

Podcasting

Oh, my Pod!

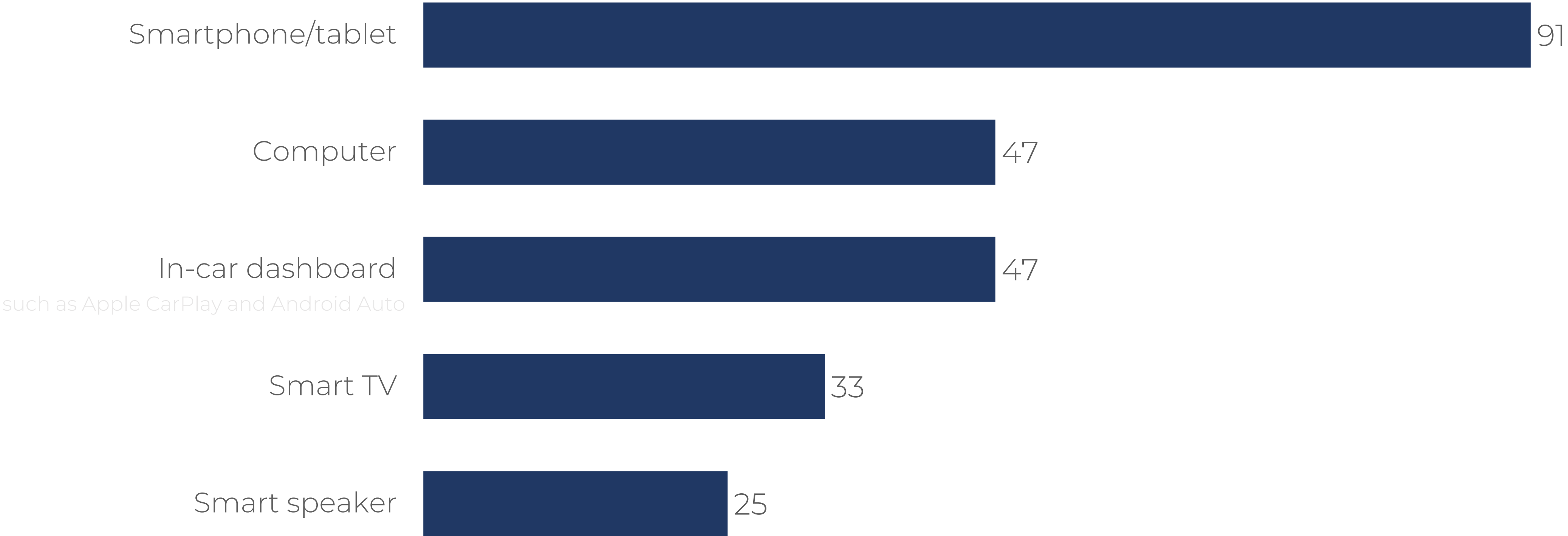


Podcasting Appeals to All Ages



% LISTENED TO A PODCAST IN LAST MONTH
TOTAL AUSTRALIAN POPULATION 12+

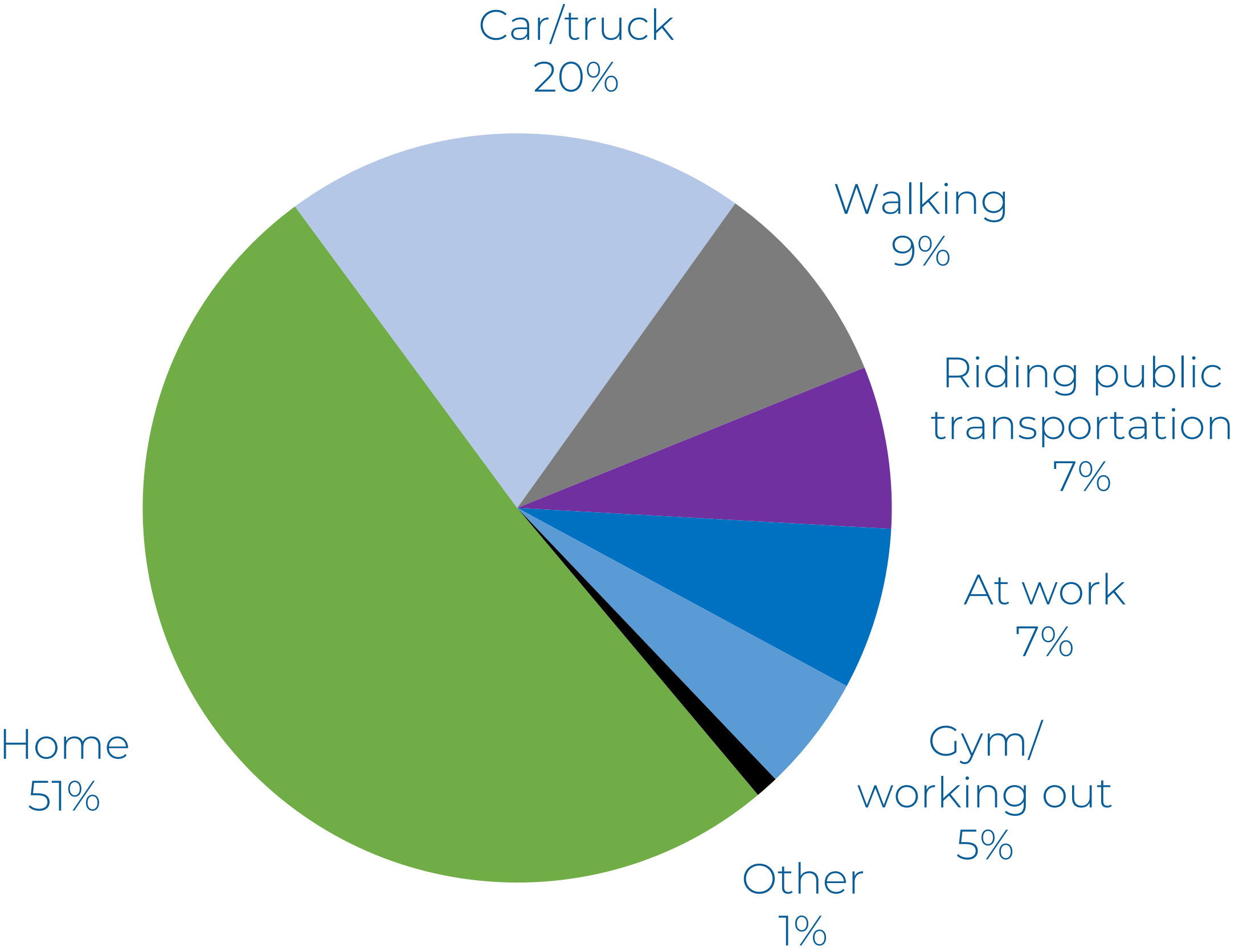
Podcasts: Audio on demand for busy consumers



% LISTENED TO A PODCAST IN LOCATION

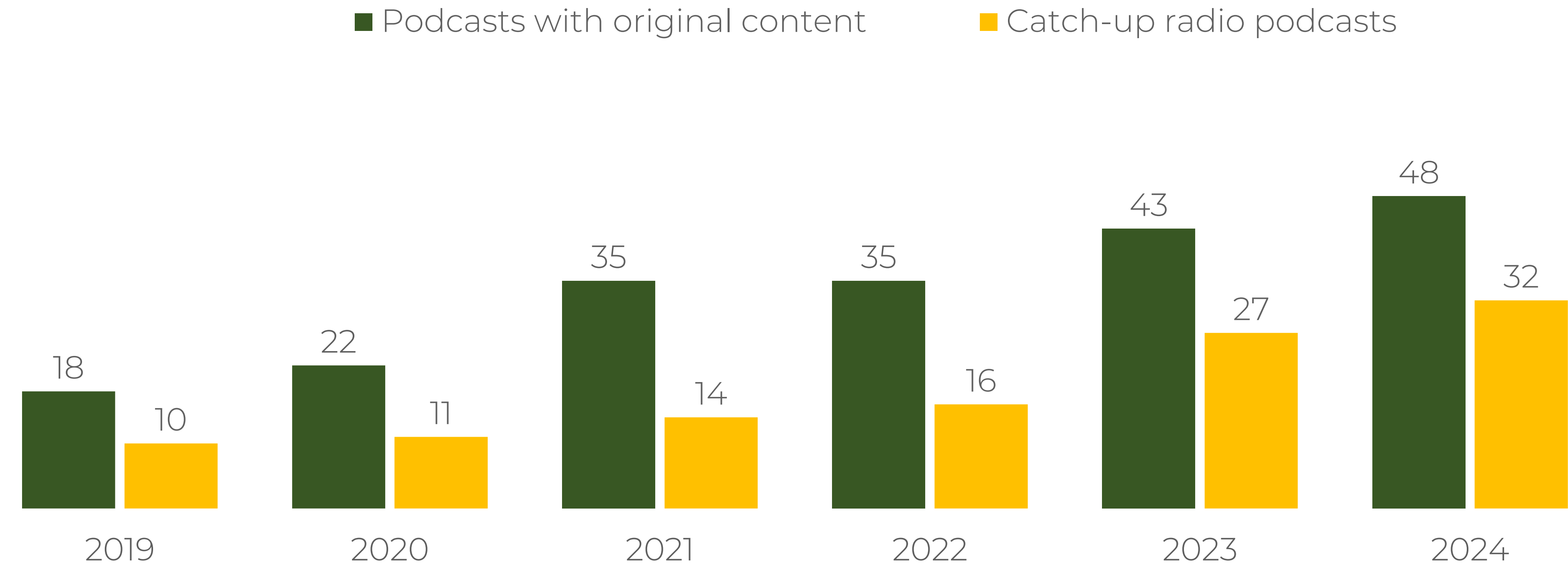
BASE: AUSTRALIANS AGE 12+ AND LISTENED TO PODCAST IN LAST MONTH; 48%

Podcasts: Where it suits listeners



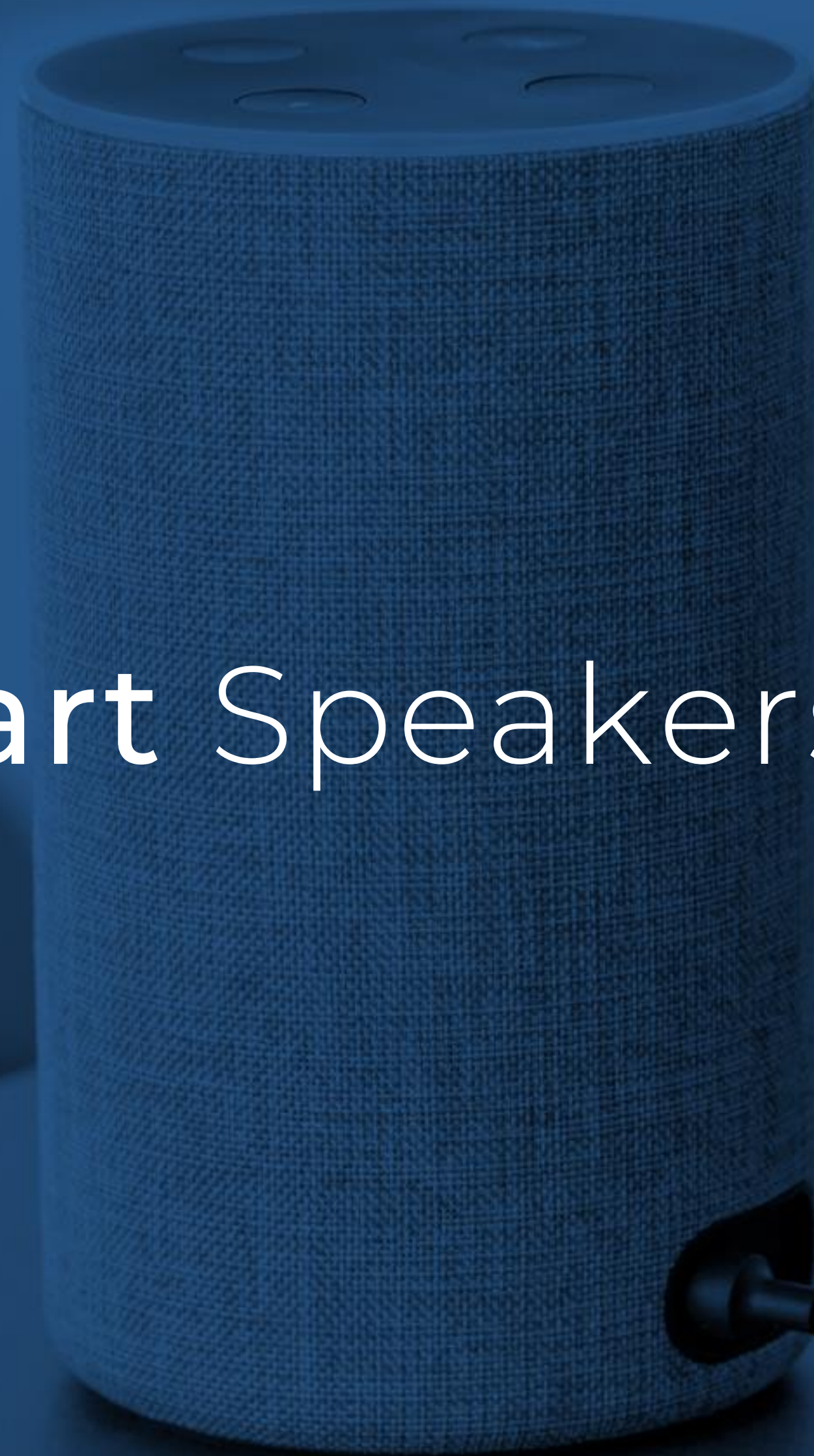
BASE: AUSTRALIANS AGE 12+ AND LISTENED TO PODCAST IN LAST MONTH; 48%

Pod Squad: Original Content + Catch-Up Radio on the rise

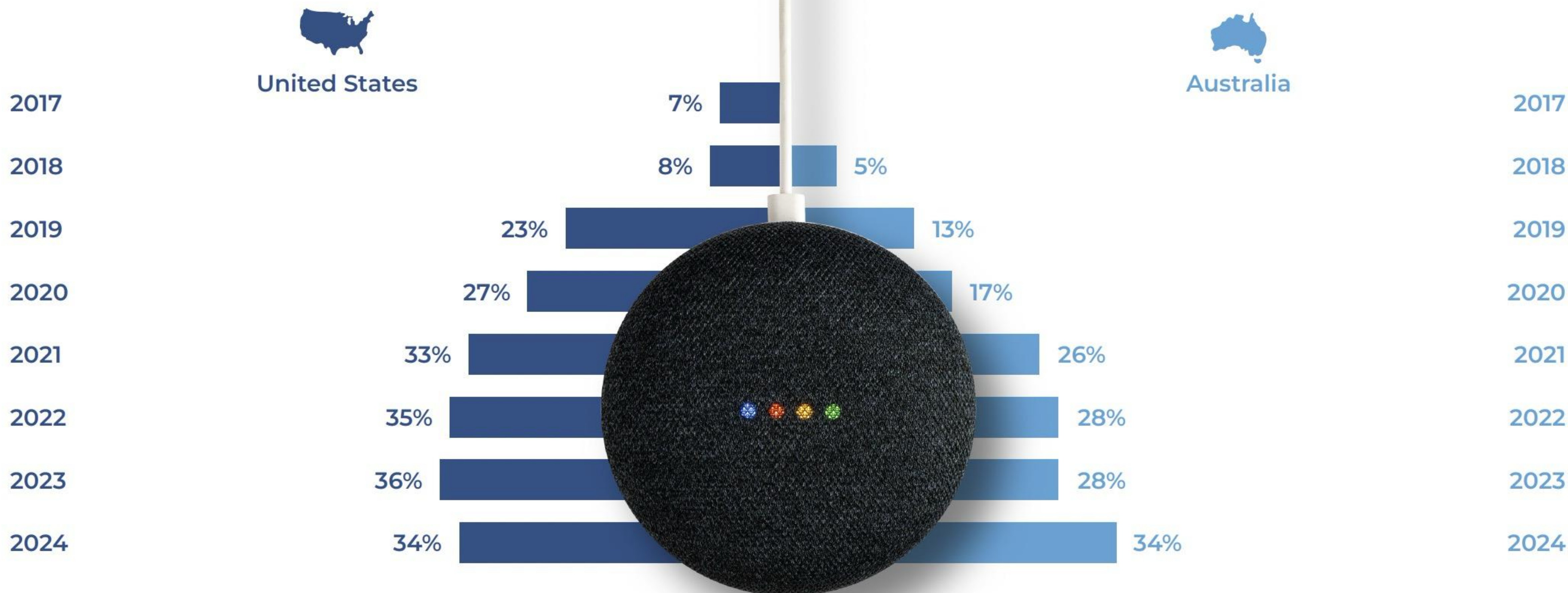


% LISTENED TO TYPE OF PODCAST AT LEAST ONCE A MONTH
TOTAL AUSTRALIAN POPULATION 12+

Smart Speakers

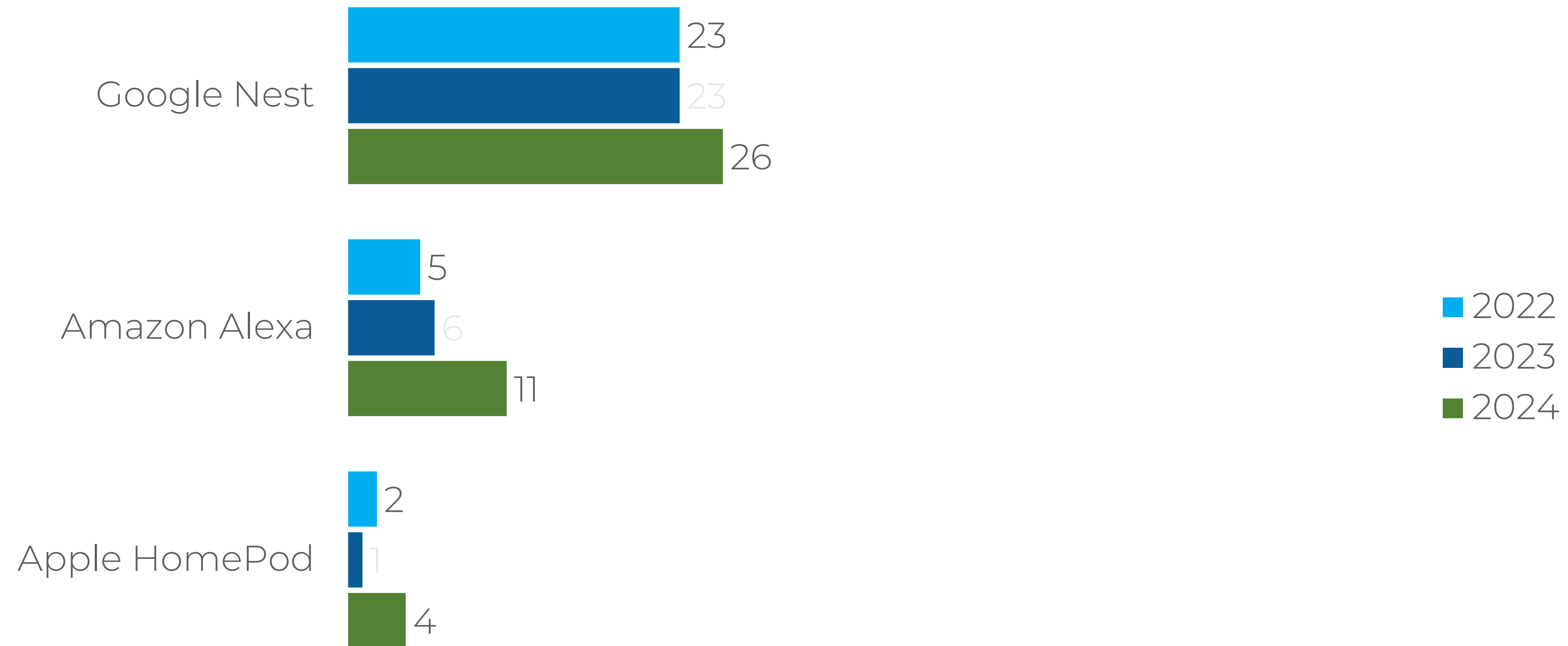


Rising Trend: The Growth of Smart Speaker Ownership



% OWNING A SMART SPEAKER
BASE: POPULATIONS 12+

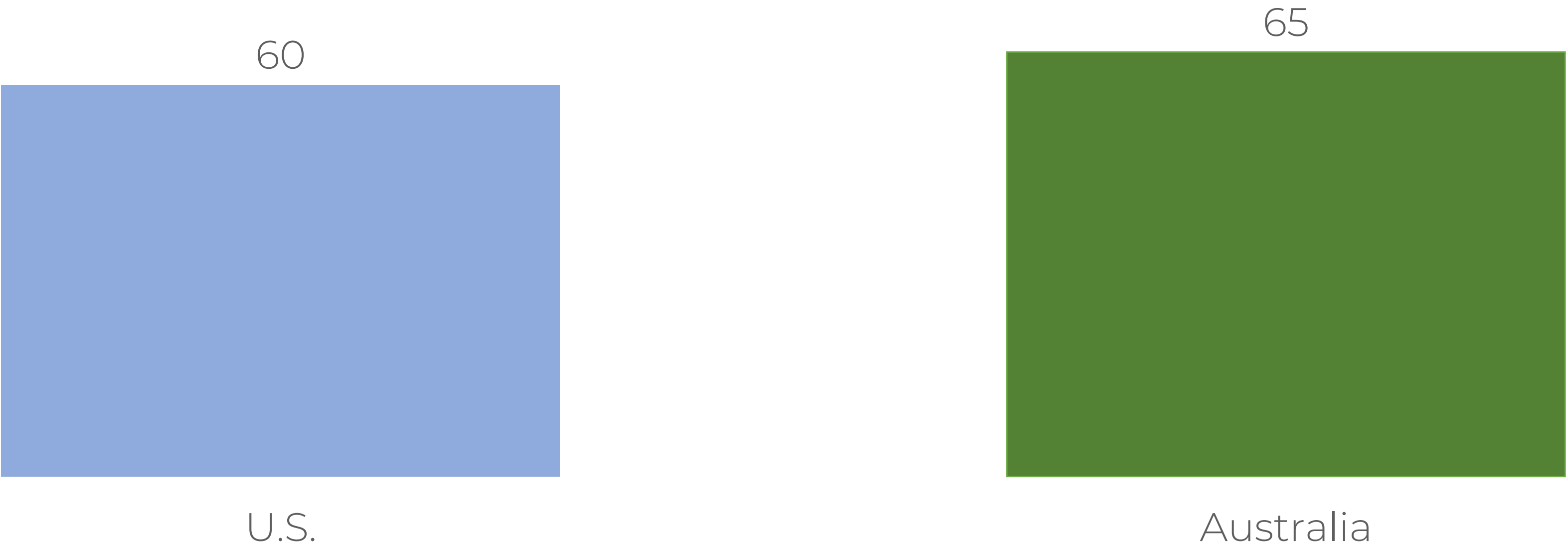
Smart Speaker Ownership



% OWNING SMART SPEAKER BRAND

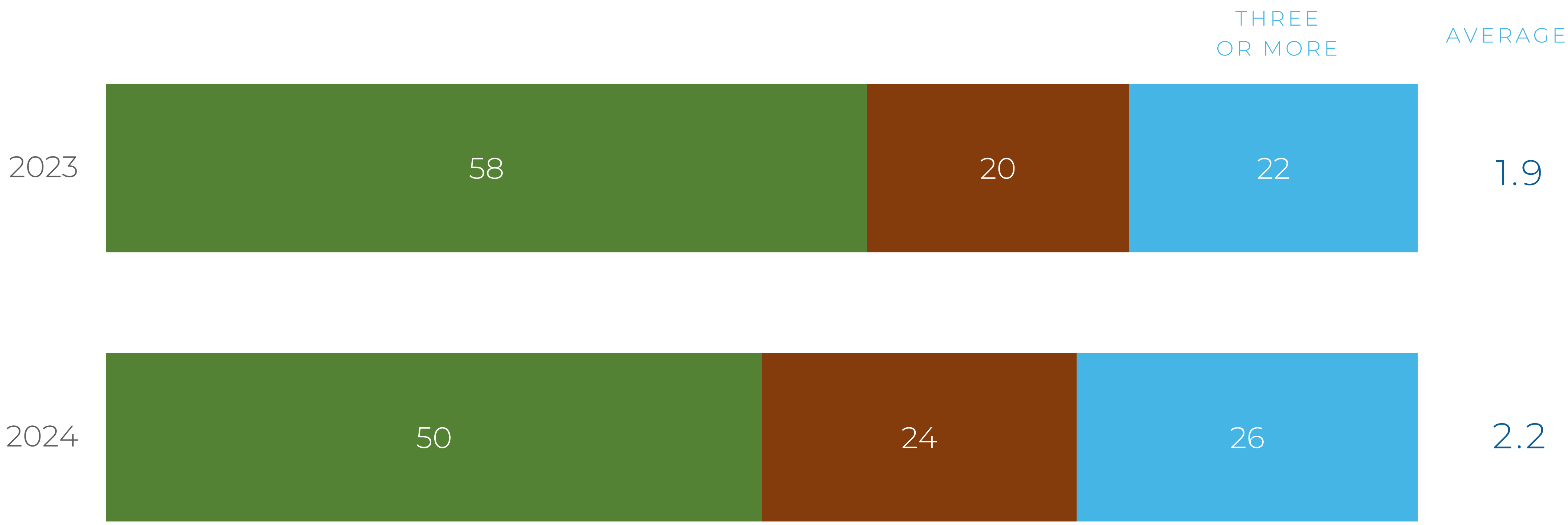
TOTAL AUSTRALIAN POPULATION 12+

Smart Speaker Listening



% LISTENED TO SMART SPEAKER IN LAST MONTH
BASE: SMART SPEAKER OWNERS AGE 12+

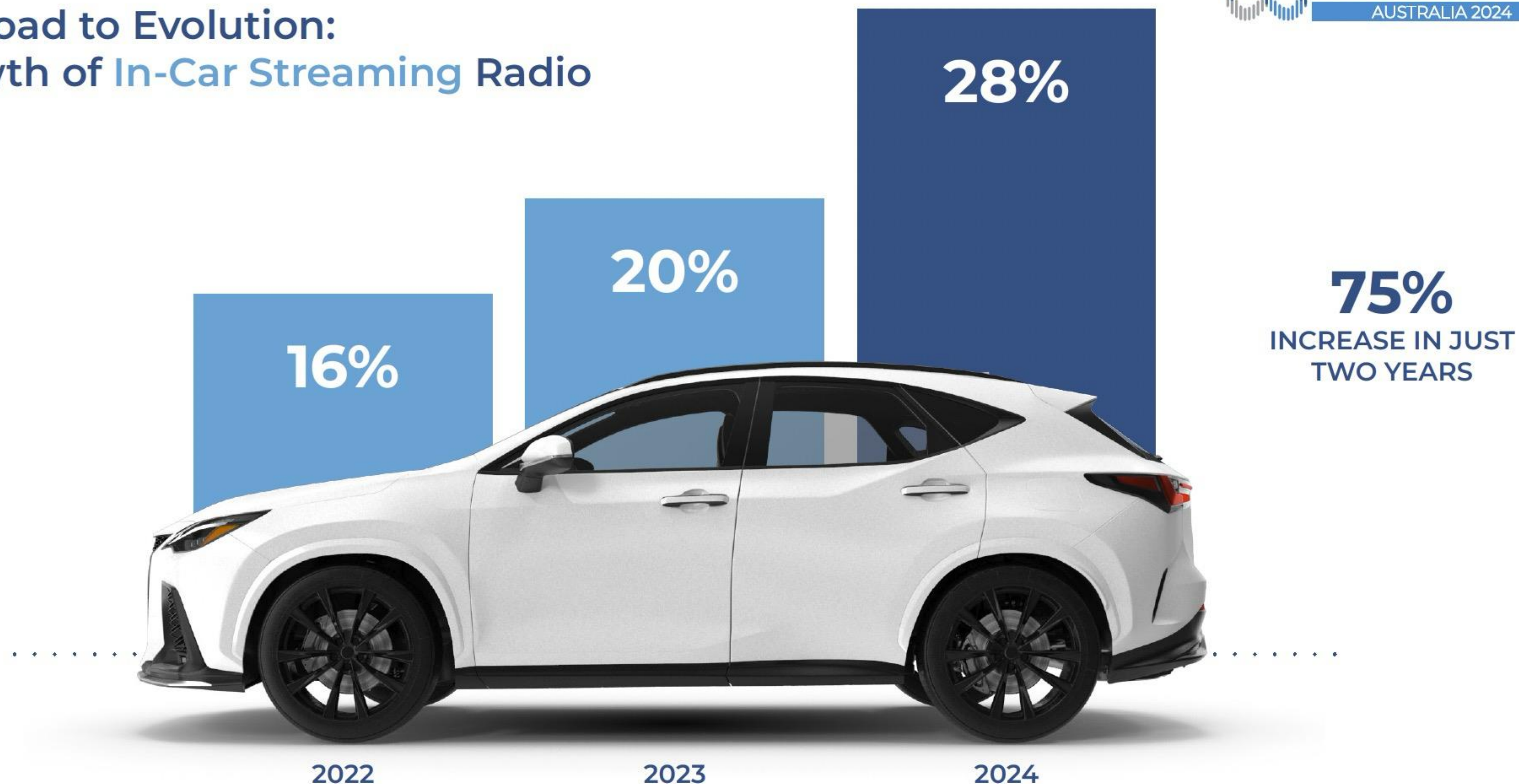
Number of Smart Speakers in Australian Homes



BASE: AUSTRALIANS AGE 12+ WHO OWN A SMART SPEAKER

In-Car Audio

On the Road to Evolution: The Growth of In-Car Streaming Radio



% LISTENING TO STREAMING RADIO IN CAR
BASE: AUSTRALIAN AGE 18+, DRIVEN/RIDDEN IN CAR IN LAST MONTH,
AND LISTEN TO ANY AUDIO IN THE CAR; 82%

Driving Tunes: The Top Audio Sources in Cars

88%

Total Radio

Music Streaming*

50%

Podcasts

37%

CD

30%

Downloaded Music

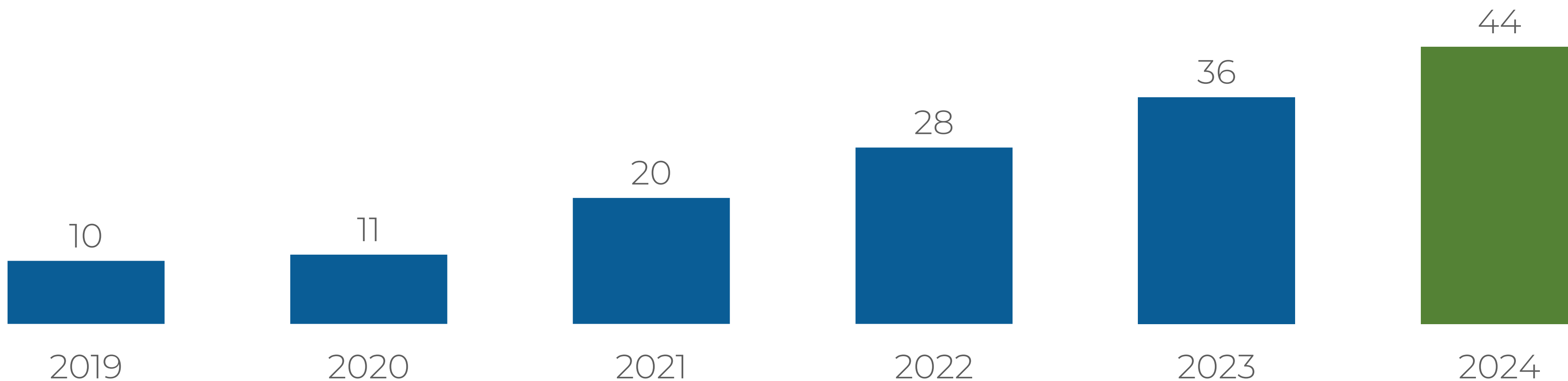
18%

% USING AUDIO SOURCE IN CAR

BASE: AUSTRALIANS AGE 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 84%

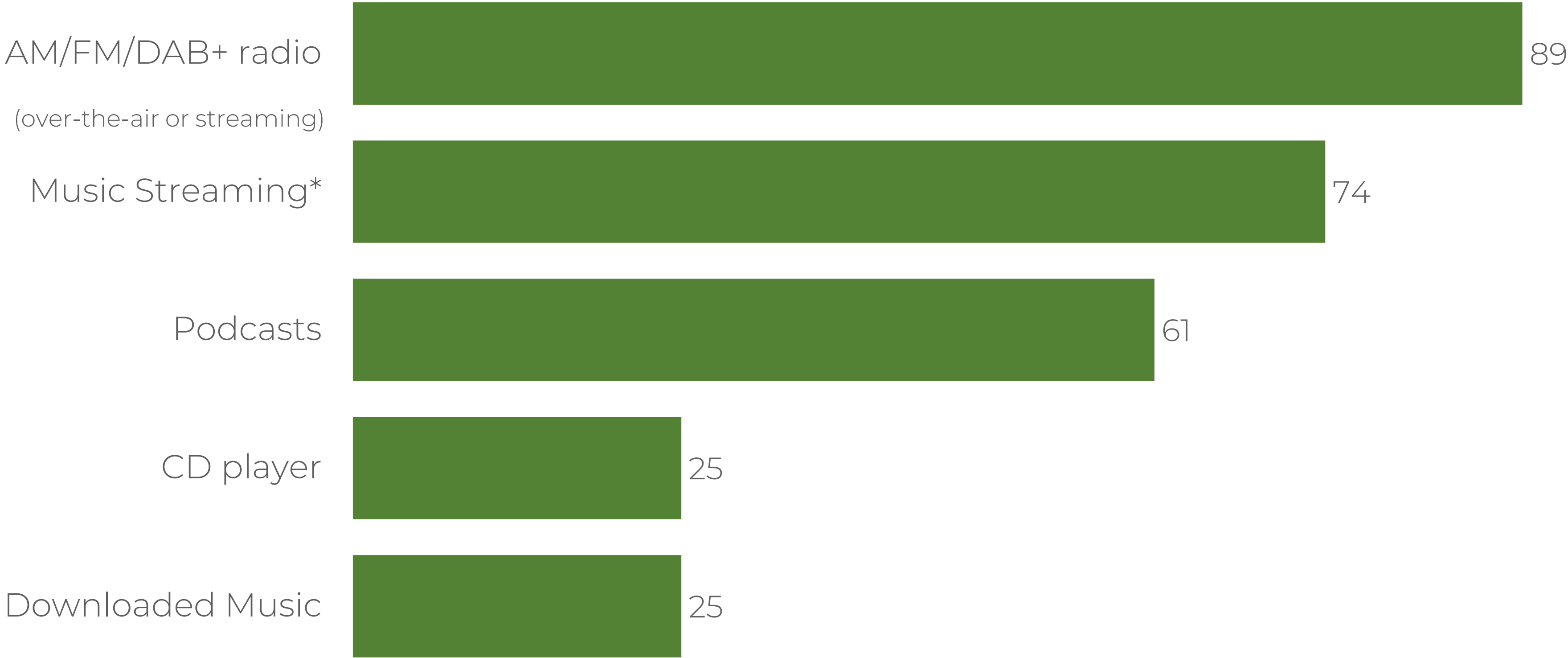
*such as Spotify, YouTube music, or Apple music

The connected Car is on the rise



BASE: AUSTRALIAN AGE 18+, DRIVEN/RIDDEN IN CAR IN LAST MONTH; 87 %
% HAVE APPLE CARPLAY OR ANDROID AUTO IN PRIMARY VEHICLE

Radio dominates in the connected Car



*SUCH AS SPOTIFY, YOUTUBE MUSIC, OR APPLE MUSIC

BASE: AUSTRALIAN AGE 18+, HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; AND USE CARPLAY/ANDROID AUTO IN CAR 37%

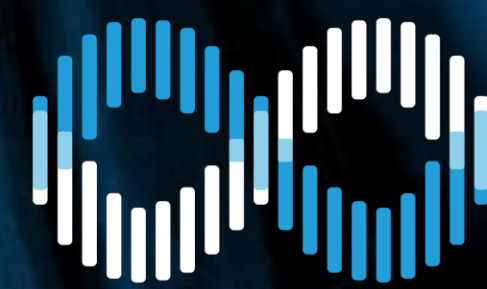
Study Overview

- Infinite Dial Australia explores the overall penetration of audio in Australia, including AM/FM, DAB+, or digital online sources. In addition, this report measures Australians' usage of the latest online platforms and technologies
- 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
- This is the eighth annual Infinite Dial Australia report since its debut in 2017
- This study is designed to allow for direct comparisons among Australia, New Zealand, and the U.S.

#InfiniteDial

Study Methodology

- In the first quarter of 2024, Edison Research conducted a national survey of 1,719 respondents in Australia aged 12 and older
 - 1,421 interviews conducted online
 - 298 interviews conducted via telephone
- Data weighted to national 12+ population figures



THE INFINITE DIAL[®] 2024

Australia



#InfiniteDial

THE INFINITE DIAL © 2024 EDISON RESEARCH