

 THE INFINITE DIAL® 2021

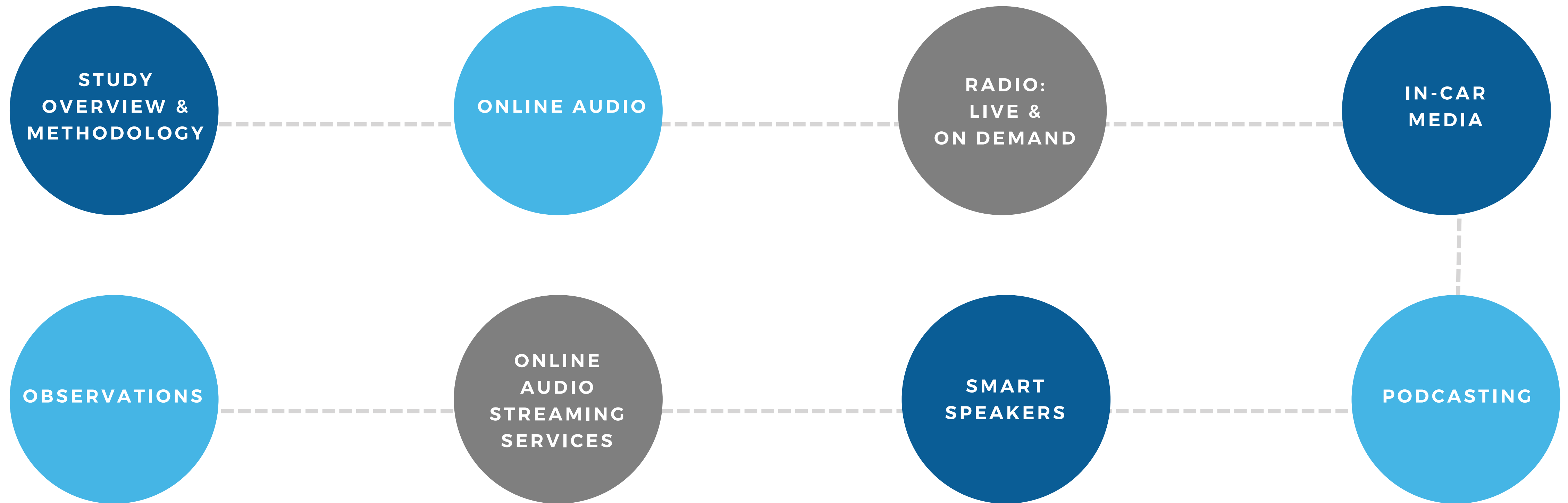
The Infinite Dial 2021 Australia

#InfiniteDial



#InfiniteDial

Presentation Outline

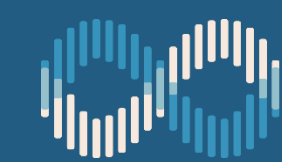


Study Overview

- ▶ Infinite Dial Australia explores the penetration of online digital audio in Australia, as well as the online platforms and technologies that Australians are using
- ▶ 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
- ▶ This is the fifth annual Infinite Dial Australia report
- ▶ This study is designed to allow for direct comparisons between the Australian and U.S. markets

Study Methodology

- ▶ In the first quarter of 2021, Edison Research conducted a national telephone survey of 1,001 Australians age 10+
- ▶ For comparison to U.S. Infinite Dial, this presentation shows data among those age 12+
- ▶ Data weighted to national 12+ population figures

 THE INFINITE DIAL® 2021

Online Audio



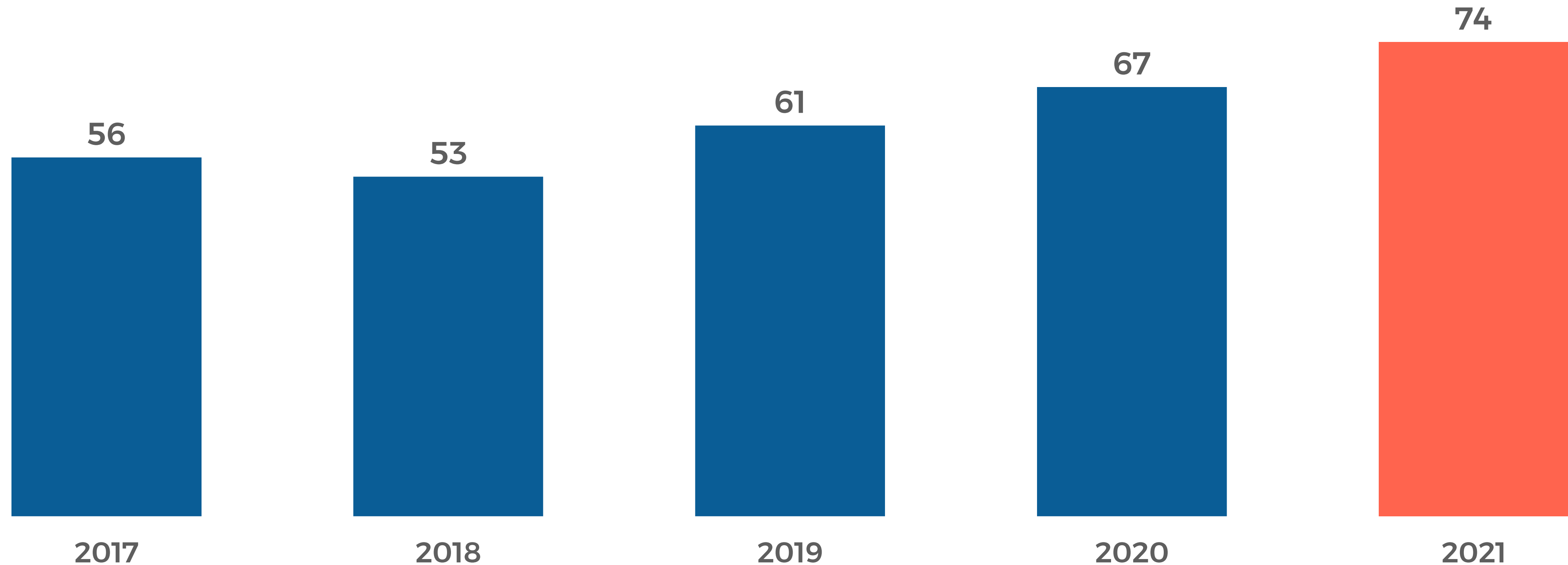
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Monthly Online Audio Listening

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO ONLINE AUDIO IN LAST MONTH

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

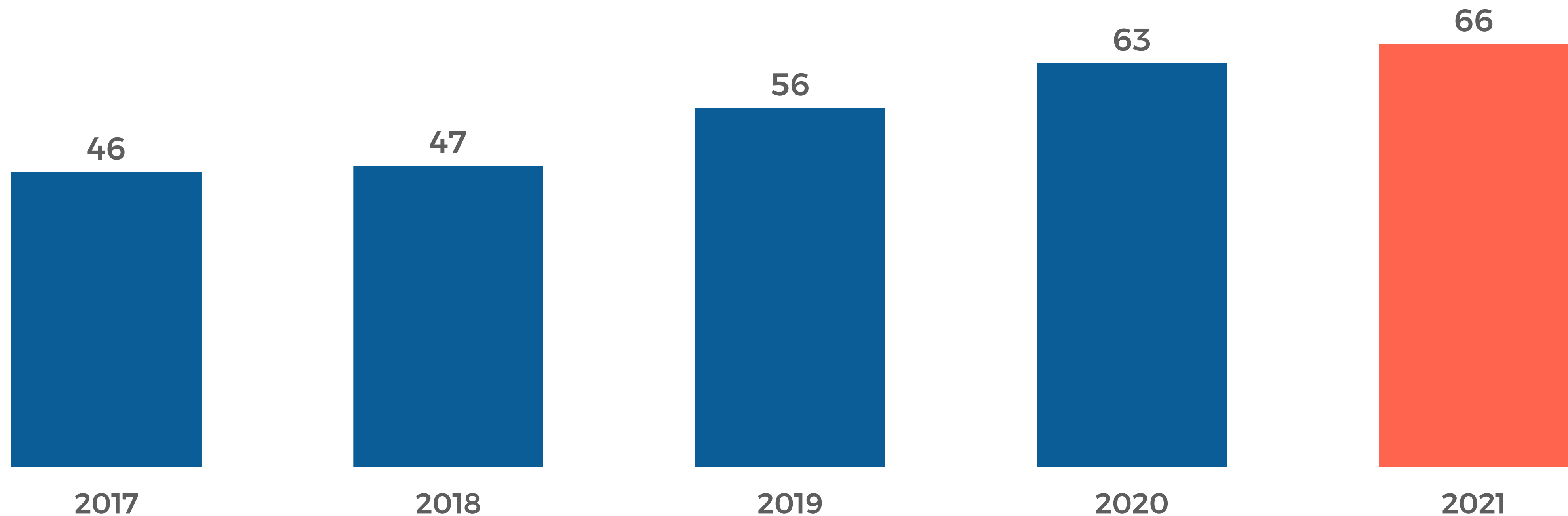


Weekly Online Audio Listening

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO ONLINE AUDIO IN LAST WEEK

ONLINE AUDIO = LISTENING TO AM/FM/DAB+ RADIO STATIONS ONLINE
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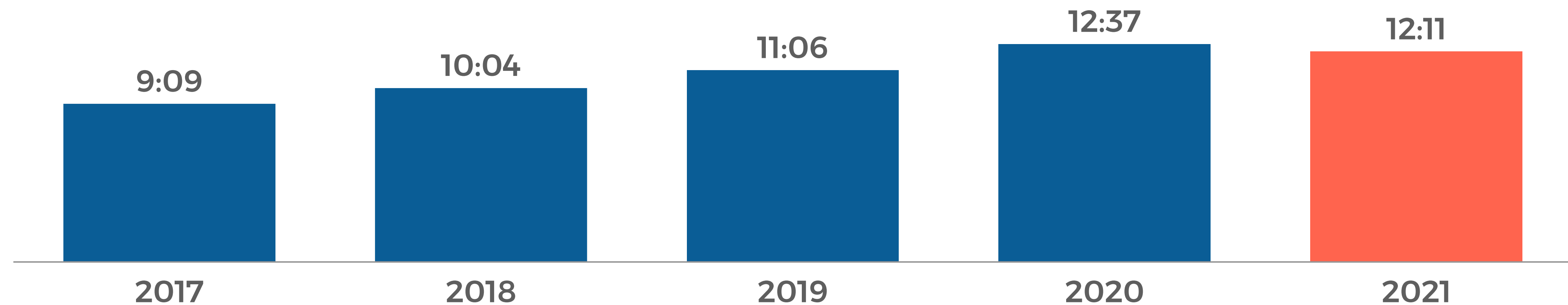


Average Time Spent Listening to Online Audio

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 AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET
INCLUDING PODCASTS AND STREAMING SERVICES

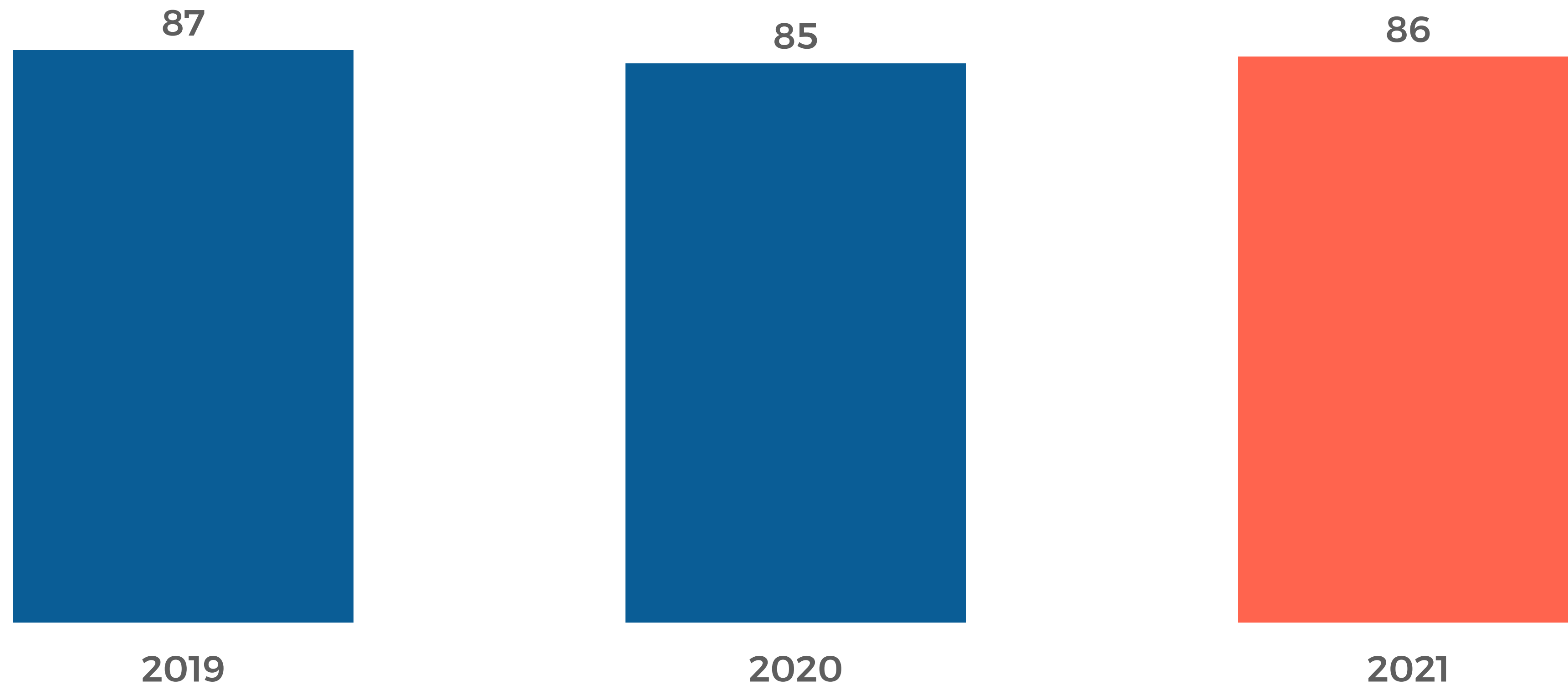


Radio: Live & On Demand

Listening to Radio Content in Last Month – Live & On Demand

TOTAL AUSTRALIAN POPULATION 12+

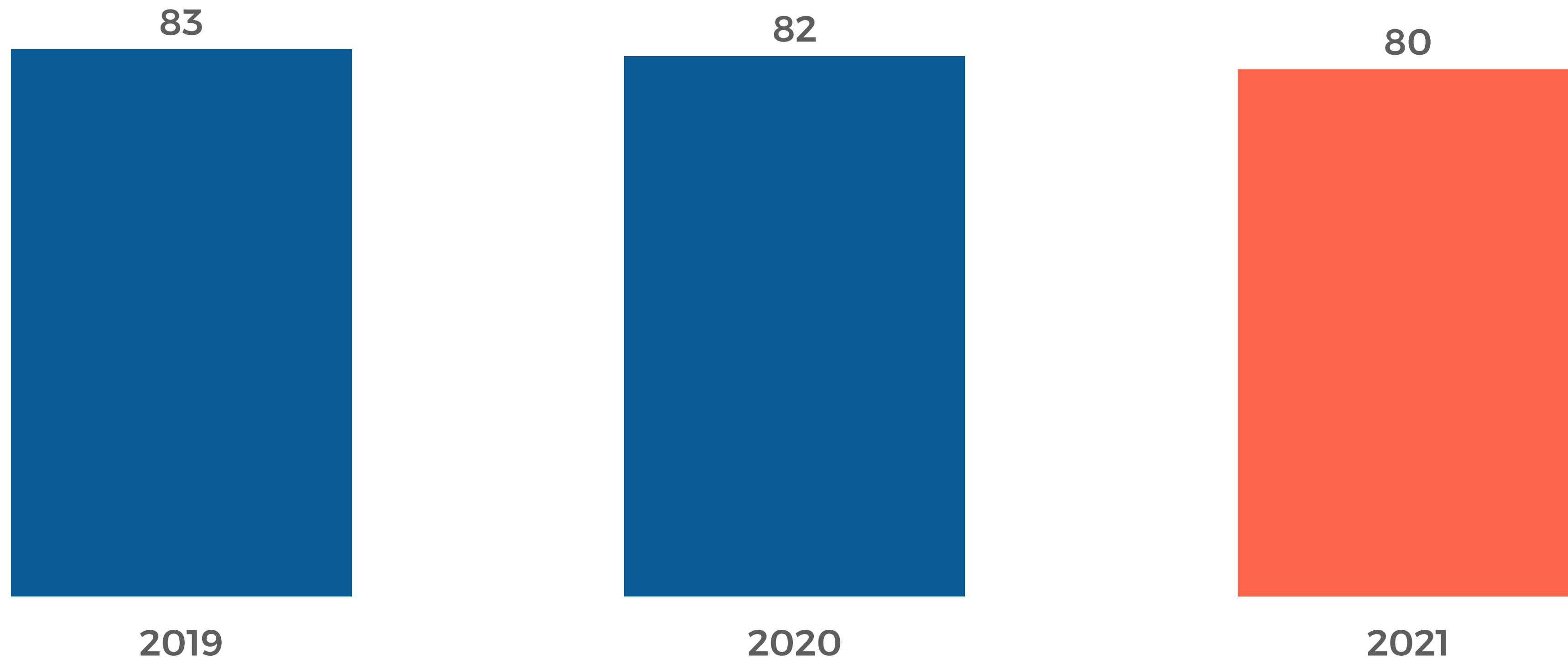
% LISTENED TO OVER-THE-AIR OR ONLINE AM/FM/DAB+ RADIO FOR AT LEAST 15 MINUTES IN LAST MONTH OR CATCH-UP PODCASTS AT LEAST ONCE A MONTH



Listening to Radio Content in Last Week – Live & On Demand

TOTAL AUSTRALIAN POPULATION 12+

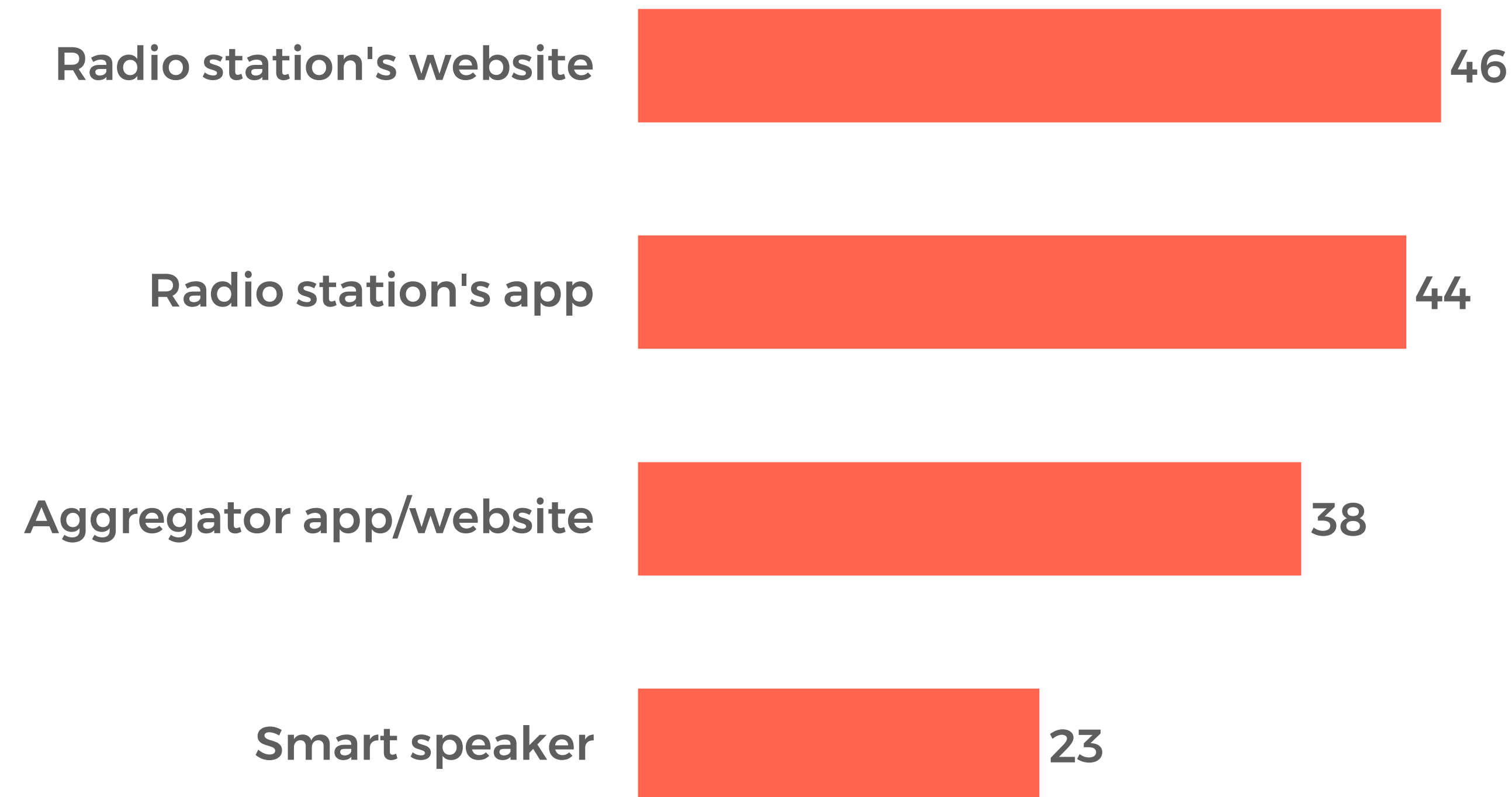
% LISTENED TO OVER-THE-AIR OR ONLINE AM/FM/DAB+ RADIO FOR AT LEAST 15 MINUTES IN LAST WEEK OR CATCH-UP PODCASTS AT LEAST ONCE A WEEK



Sources Used to Listen to Online AM/FM/DAB+ Radio

AUSTRALIAN AGE 12+ AND LISTENED TO AM, FM, OR DAB+ RADIO STATIONS THROUGH THE INTERNET

% USING SOURCE TO LISTEN TO AM/FM/DAB+ RADIO



 THE INFINITE DIAL® 2021

In-Car Media

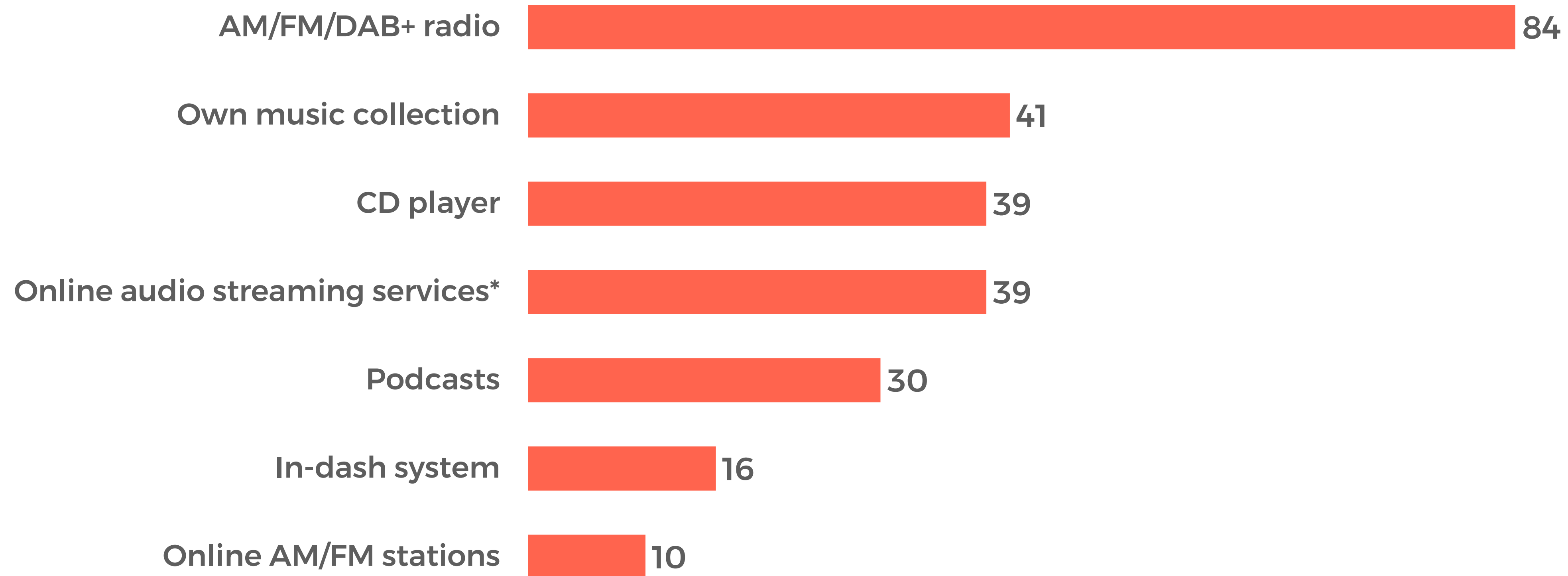


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Audio Sources Used in Car

BASE: AUSTRALIAN AGE 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 88%

% USING AUDIO SOURCE IN CAR

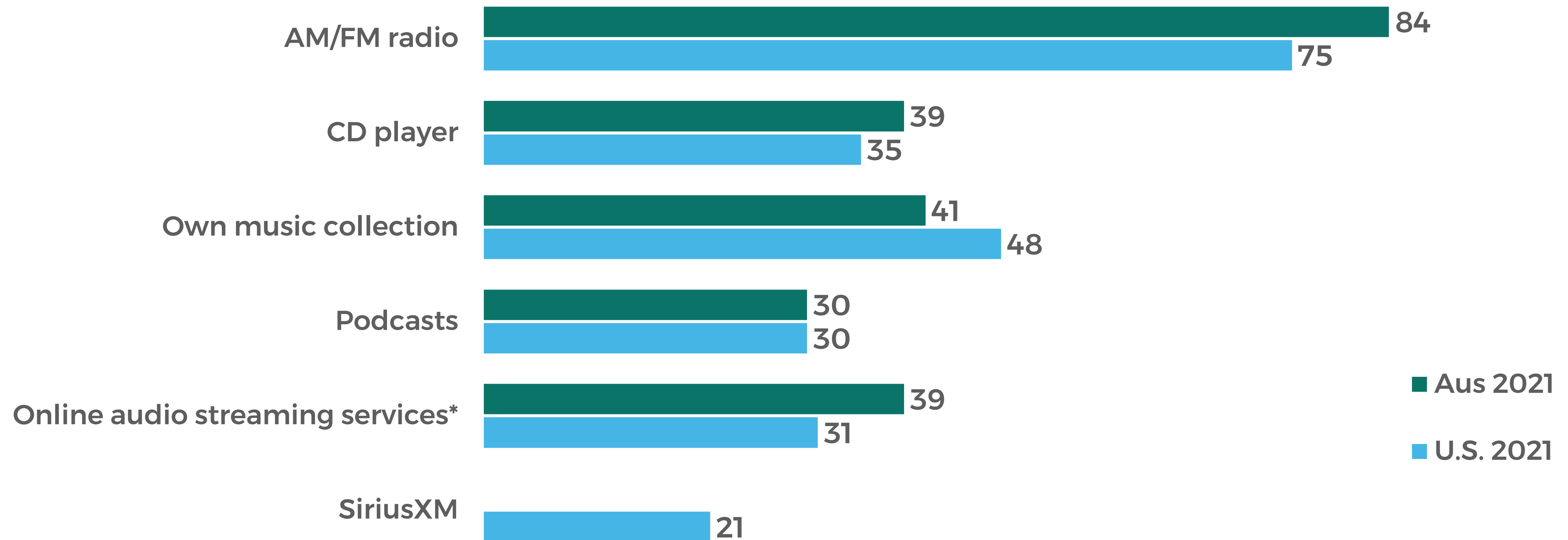


**SUCH AS SPOTIFY, YOUTUBE, OR APPLE MUSIC*

Audio Sources Used in Car

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

% USING AUDIO SOURCE IN CAR

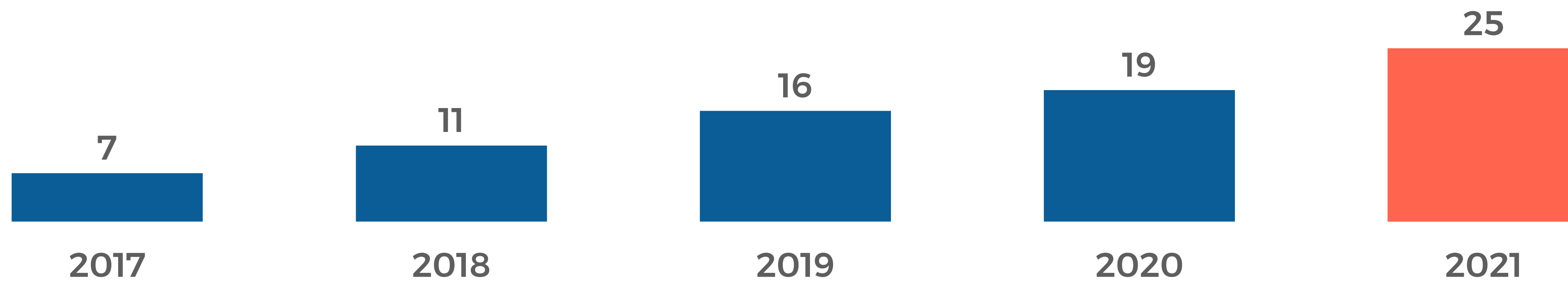


*SUCH AS SPOTIFY, YOUTUBE, OR APPLE MUSIC

In-Dash Systems that can Receive Info/Entertainment over the Internet

BASE: AUSTRALIAN AGE 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 88%

% OWNING IN-DASH SYSTEM THAT RECEIVES INFORMATION/ENTERTAINMENT OVER THE INTERNET

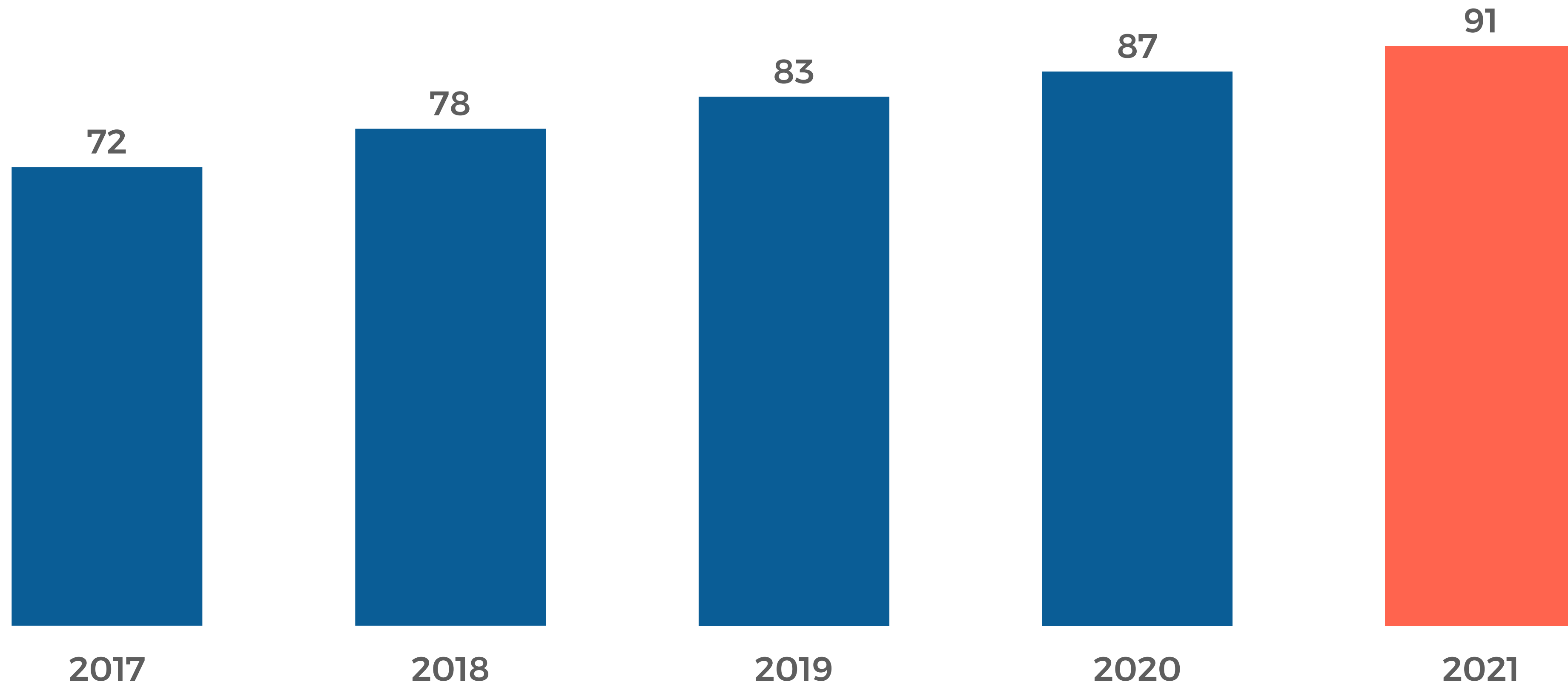


Podcasting

Podcasting Awareness

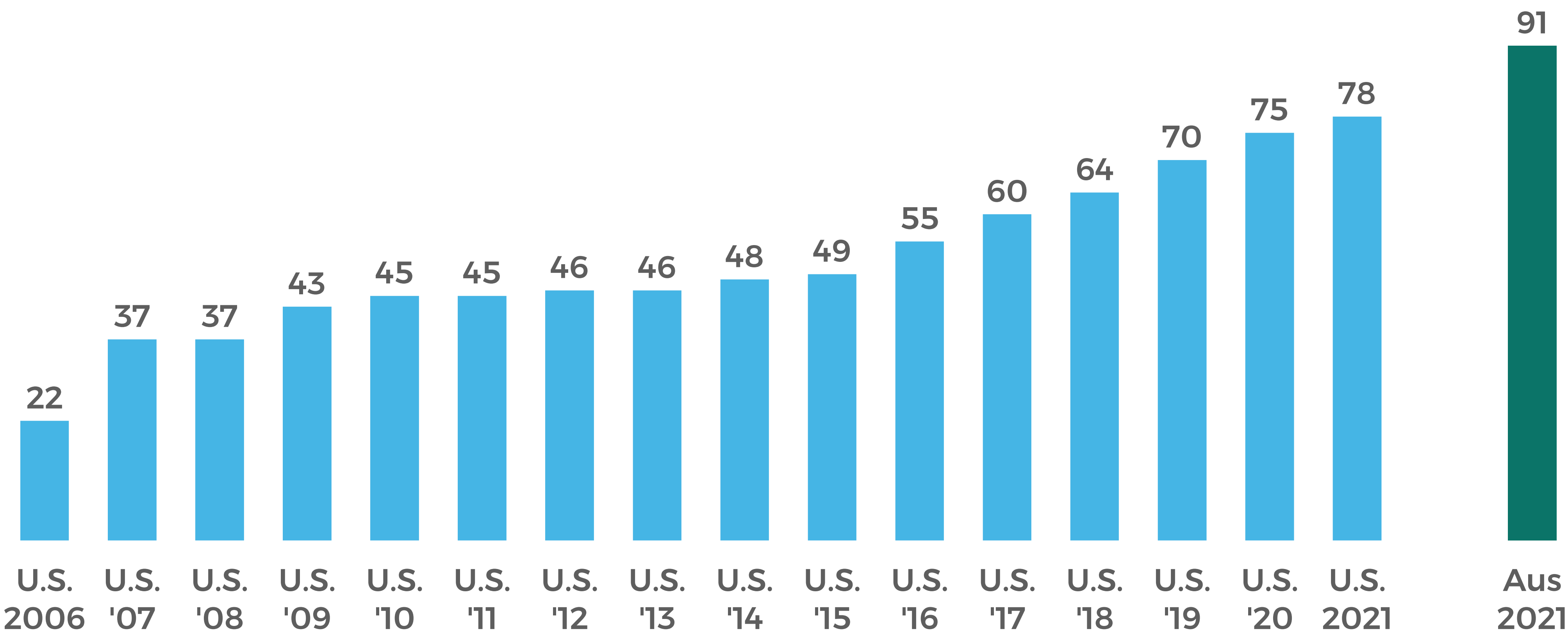
TOTAL AUSTRALIAN POPULATION 12+

% AWARE OF PODCASTING



Podcasting Awareness

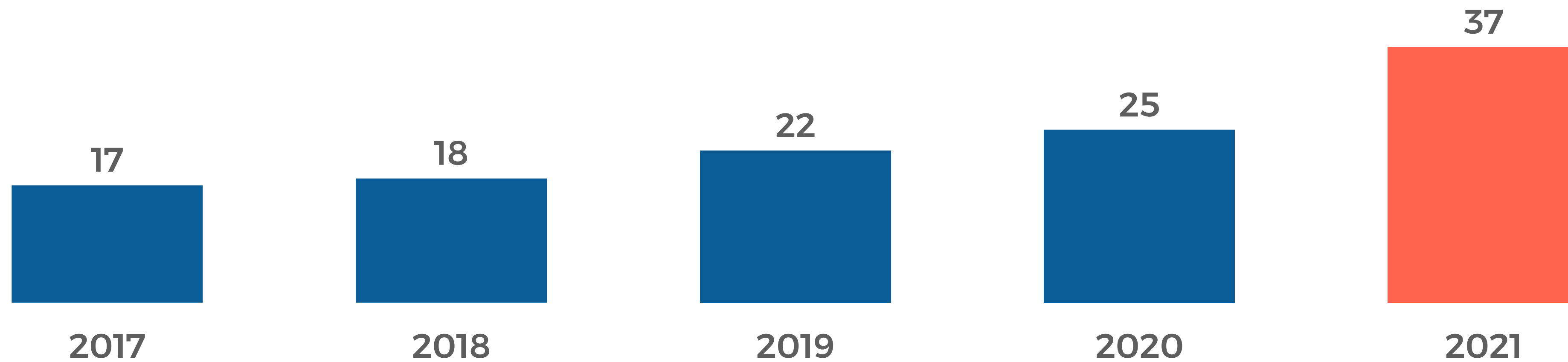
POPULATIONS 12+
% AWARE OF PODCASTING



Monthly Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+

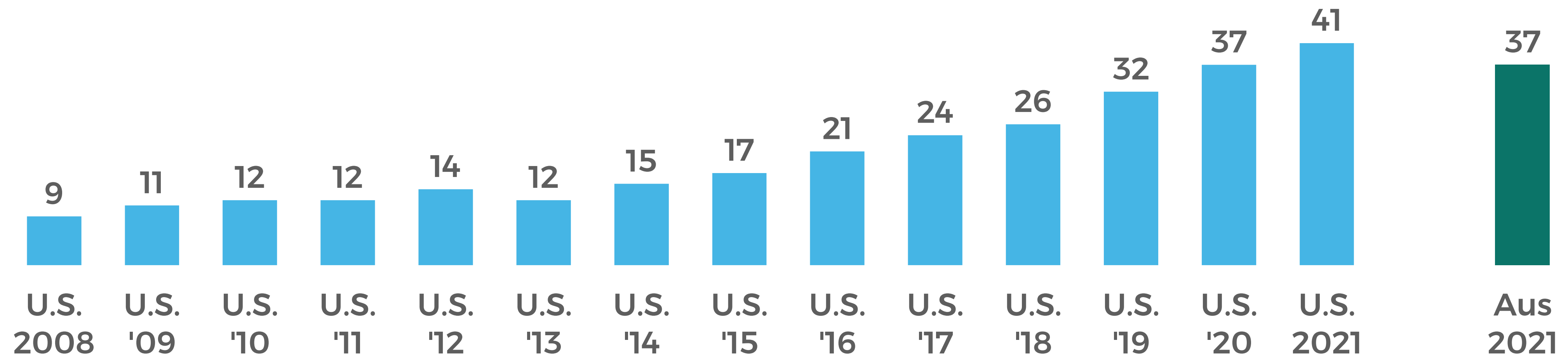
% LISTENED TO A PODCAST IN LAST MONTH



Monthly Podcast Listening

POPULATIONS 12+

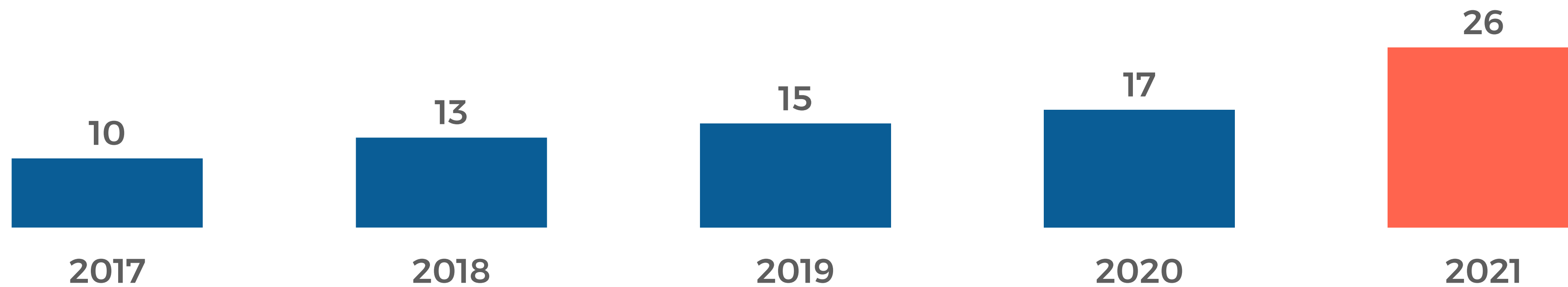
% LISTENED TO A PODCAST IN LAST MONTH



Weekly Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+

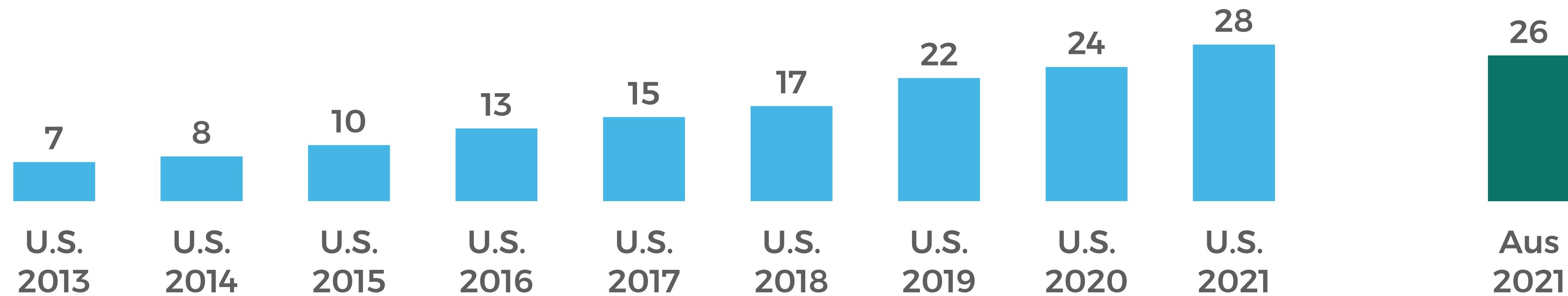
% LISTENED TO A PODCAST IN LAST WEEK



Weekly Podcast Listening

POPULATIONS 12+

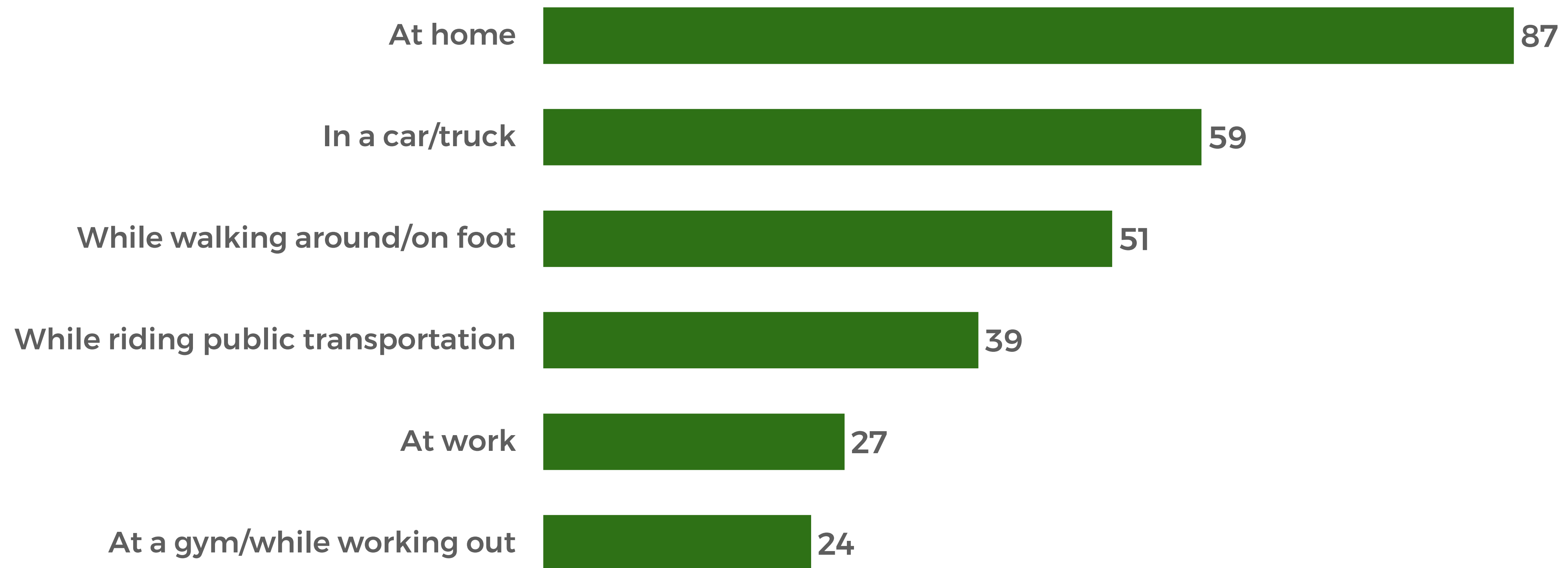
% LISTENED TO A PODCAST IN LAST WEEK



Podcast Listening Locations

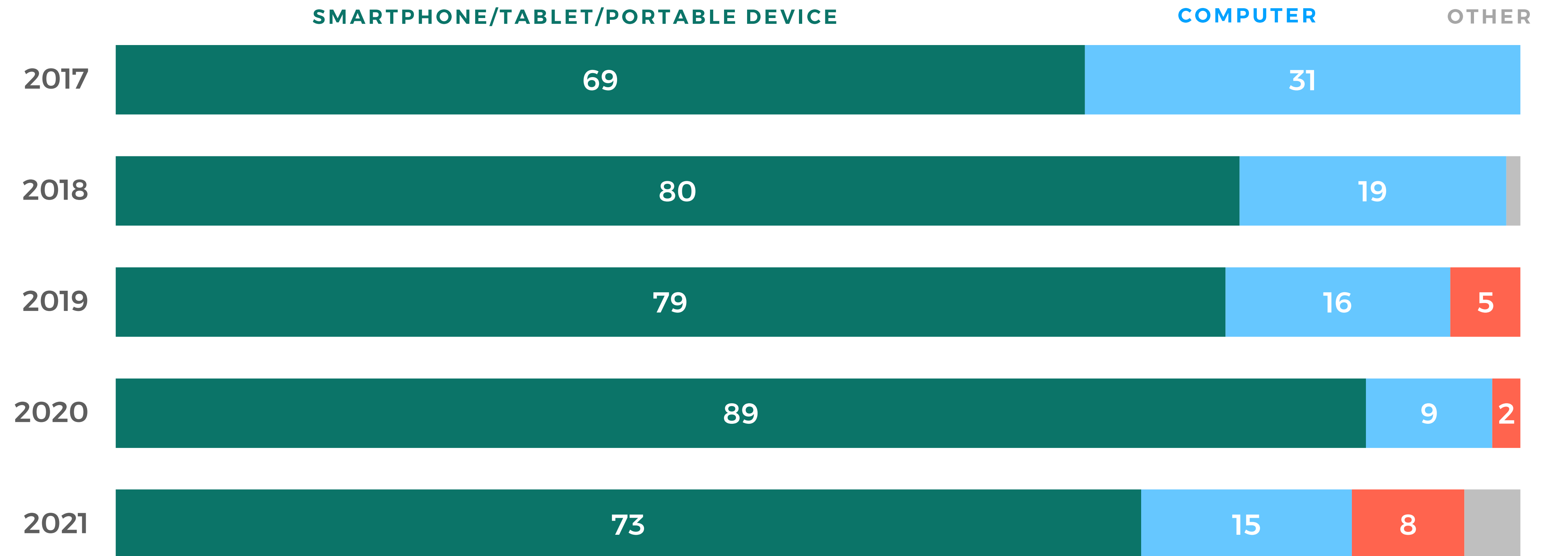
BASE: AUSTRALIAN 12+ AND LISTENED TO PODCAST IN LAST MONTH; 37%

% LISTENED TO A PODCAST IN LOCATION



Device Used Most Often to Listen to Podcasts

BASE: AUSTRALIAN 12+ AND LISTENED TO PODCAST IN LAST MONTH; 37%

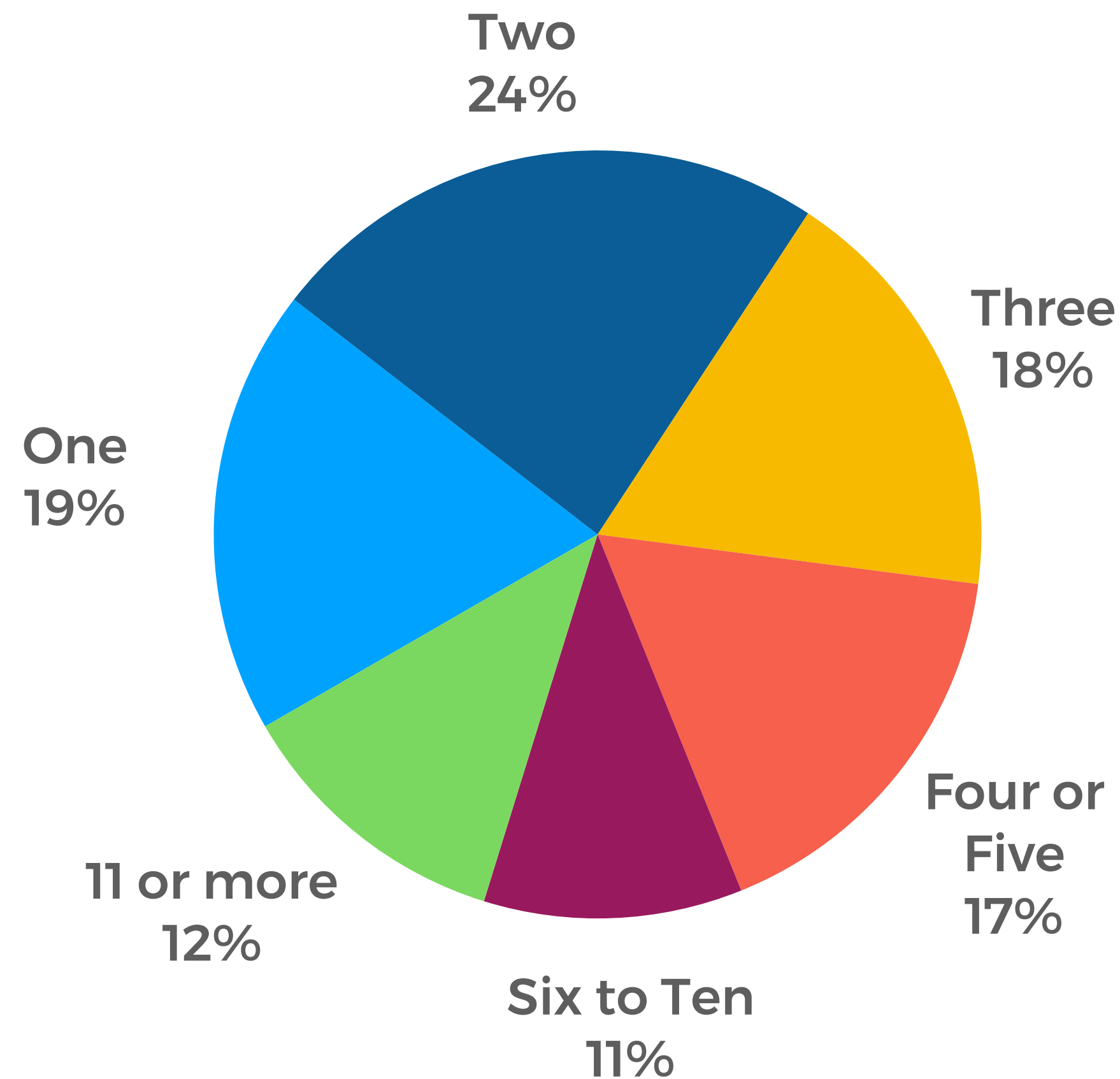


IN-CAR
ENTERTAINMENT
SYSTEM

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Number of Podcasts Listened to in Last Week

BASE: AUSTRALIAN 12+ AND LISTENED TO PODCAST IN LAST WEEK; 26%



Australian weekly podcast listeners averaged
five podcasts
in the last week

Smart Speakers

Smart Speaker Ownership

TOTAL AUSTRALIAN POPULATION 12+

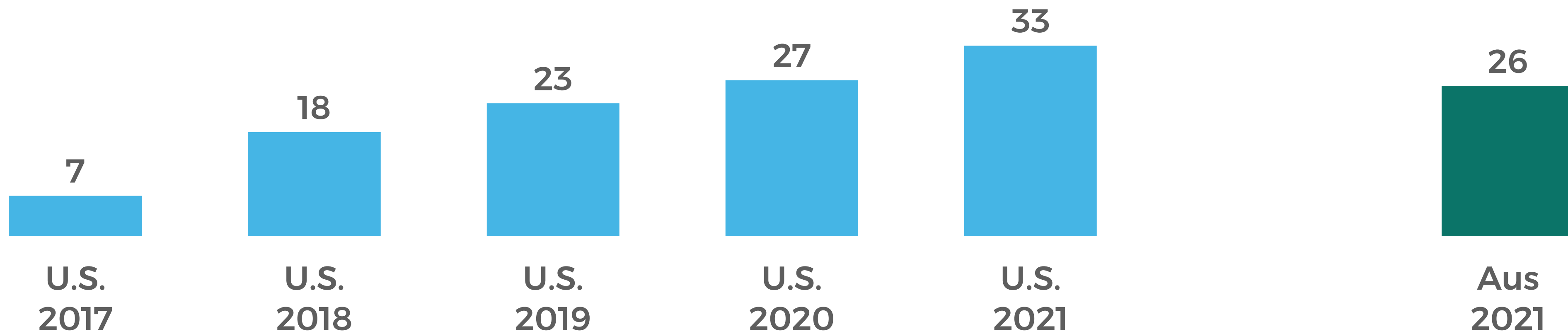
% OWNING A SMART SPEAKER



Smart Speaker Ownership

POPULATIONS 12+

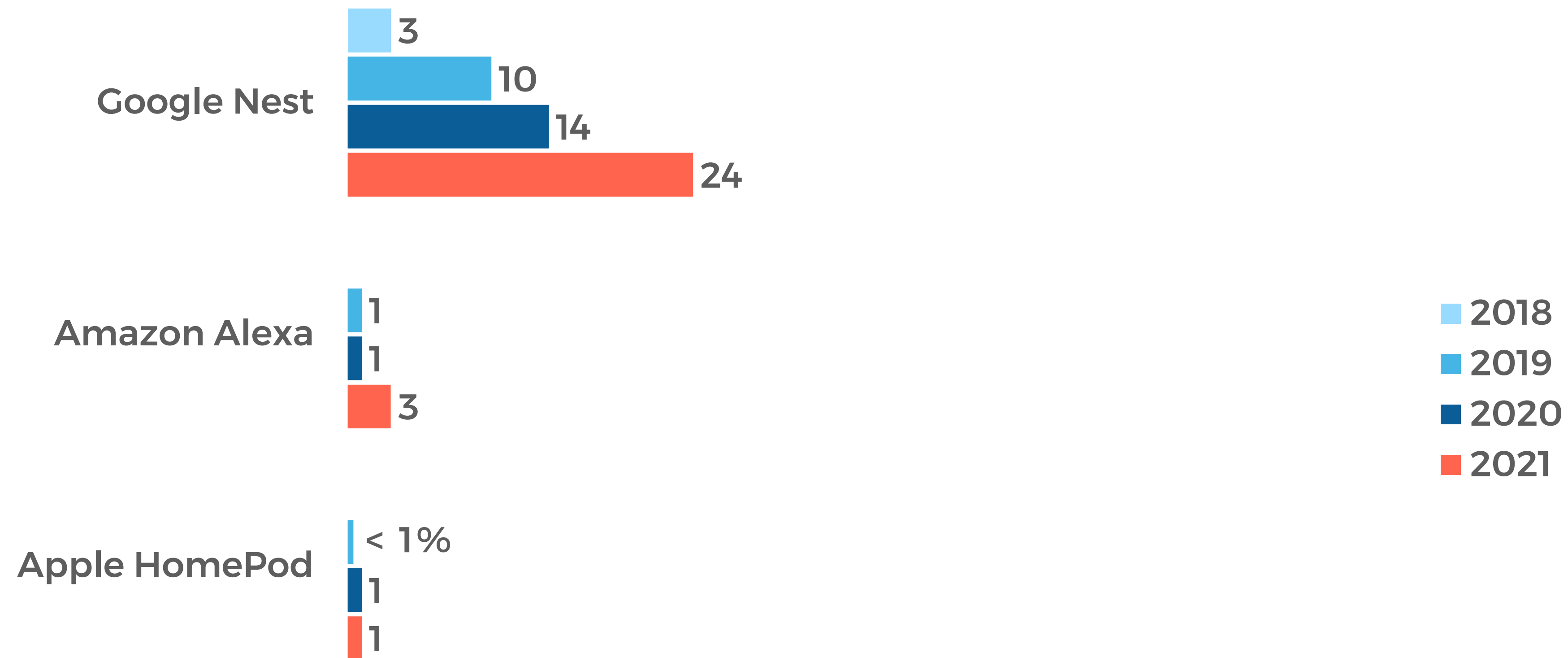
% OWNING A SMART SPEAKER



Smart Speaker Ownership

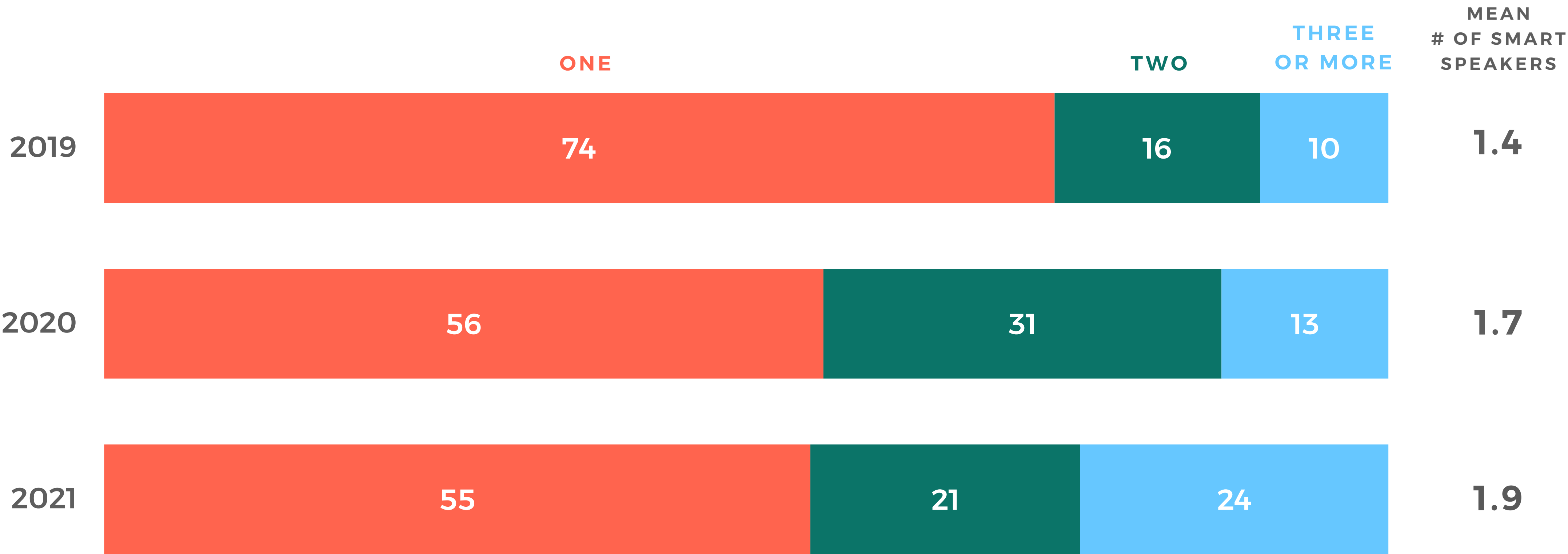
TOTAL AUSTRALIAN POPULATION 12+

% OWNING SMART SPEAKER BRAND



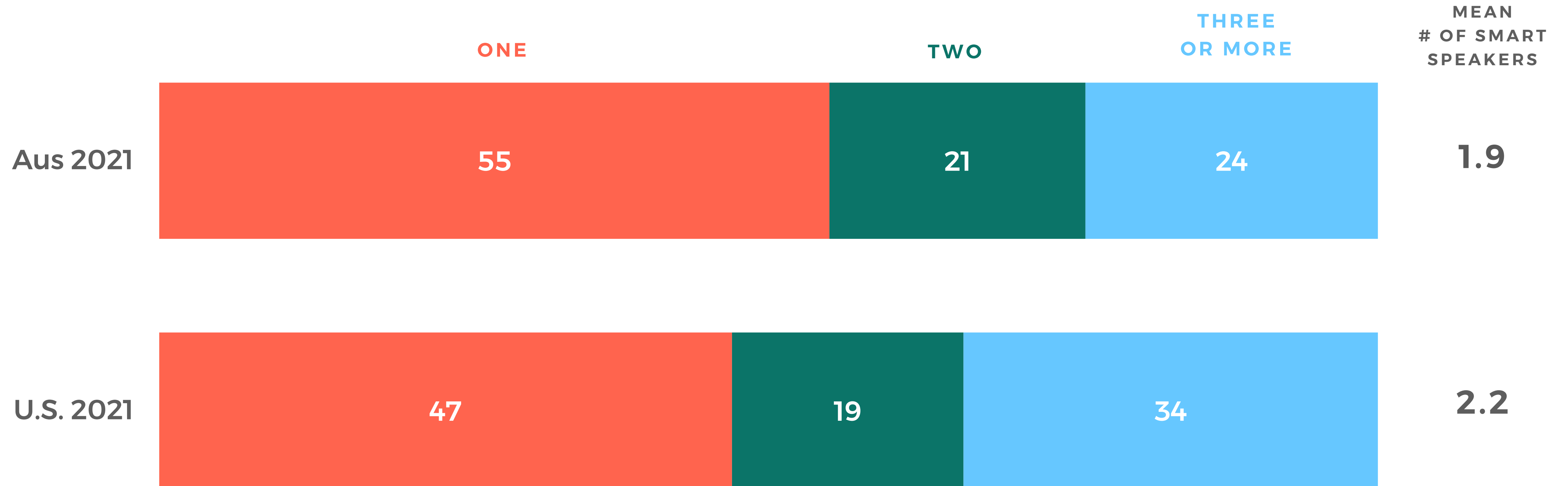
Number of Smart Speakers in Household

BASE: AUSTRALIAN 12+ WHO OWN A SMART SPEAKER



Number of Smart Speakers in Household

BASE: AGE 12+ WHO OWN A SMART SPEAKER

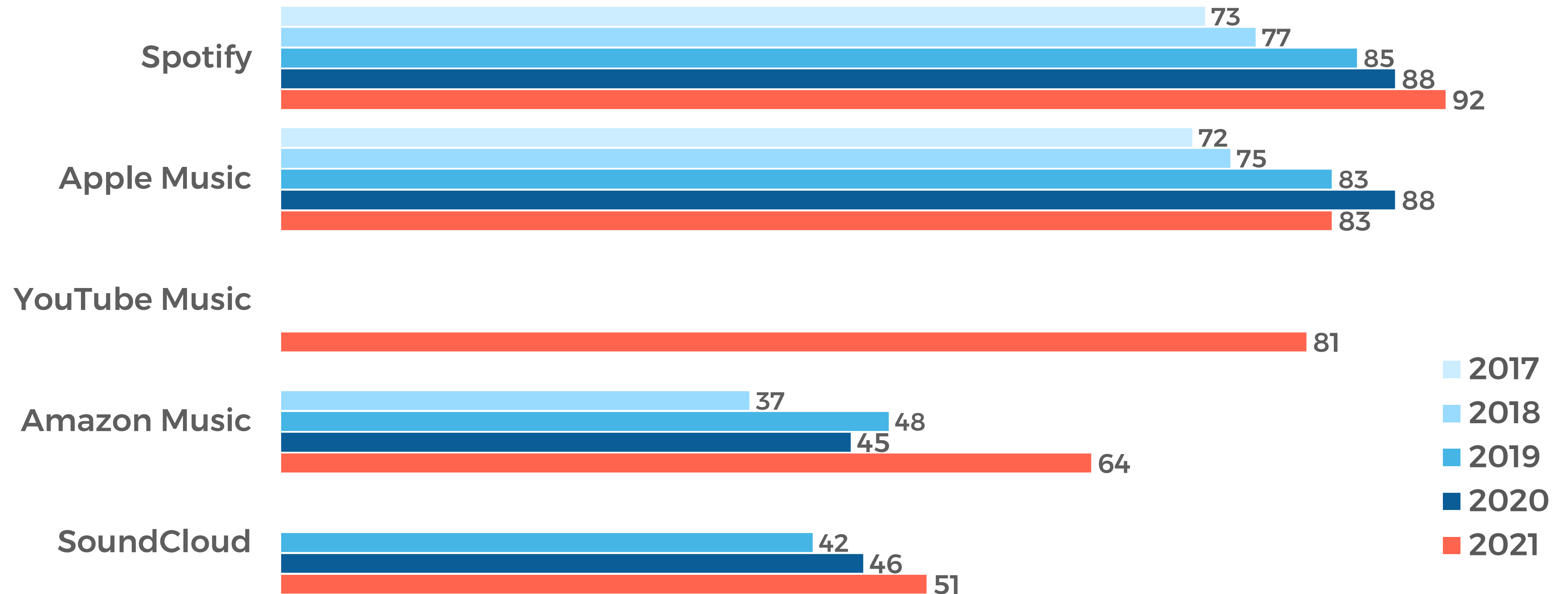


Online Audio Streaming Services

Awareness of Online Audio Streaming Services

TOTAL AUSTRALIAN POPULATION 12+

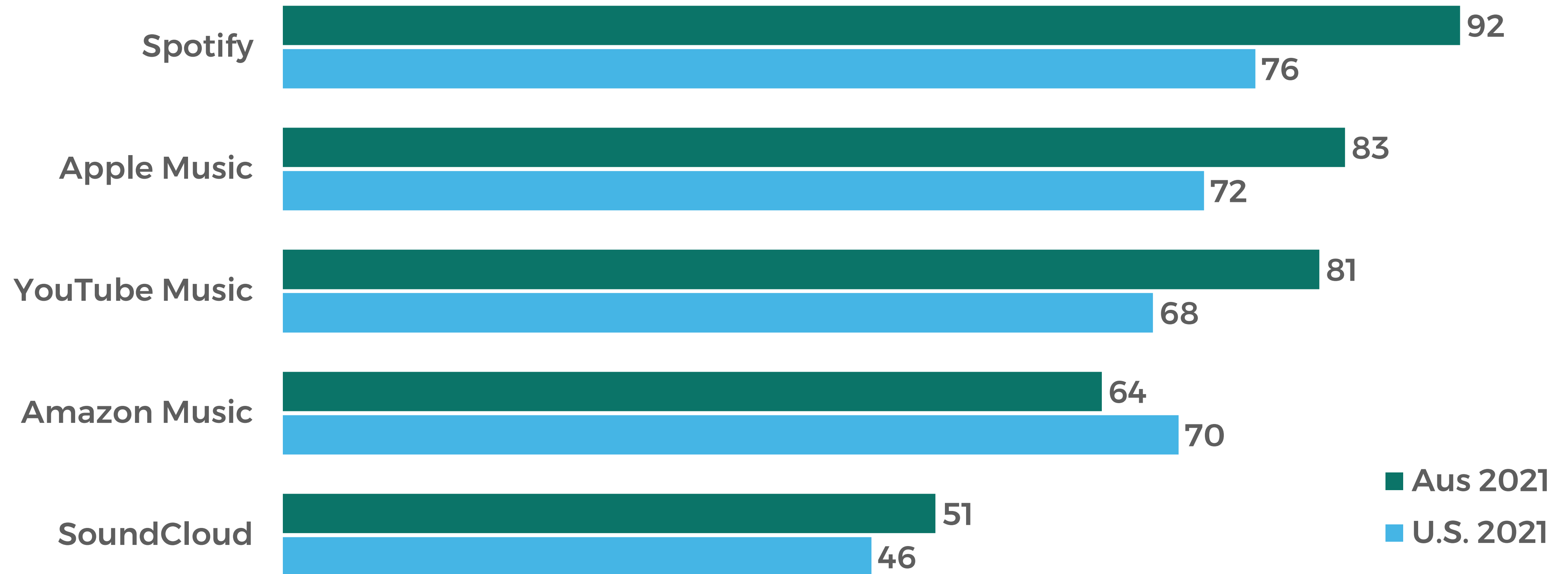
% AWARE OF ONLINE AUDIO STREAMING SERVICE



Awareness of Online Audio Streaming Services

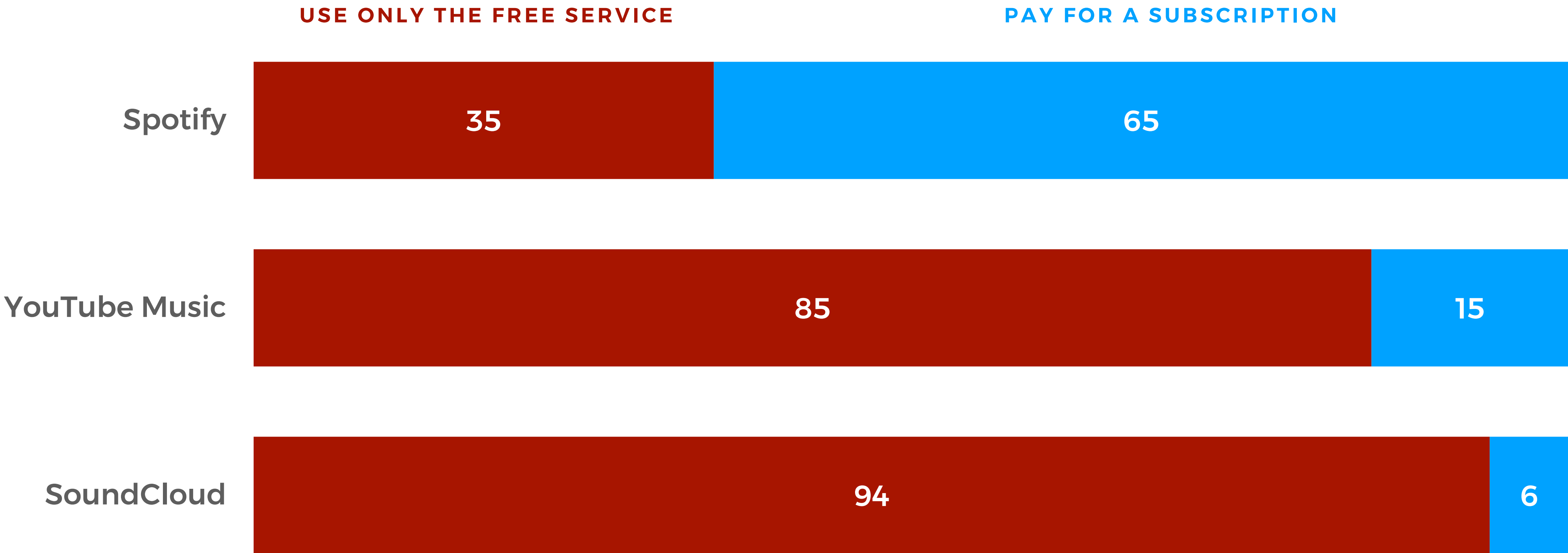
POPULATIONS 12+

% AWARE OF ONLINE AUDIO STREAMING SERVICE



Free vs. Paid Subscriptions to Online Audio Streaming Services

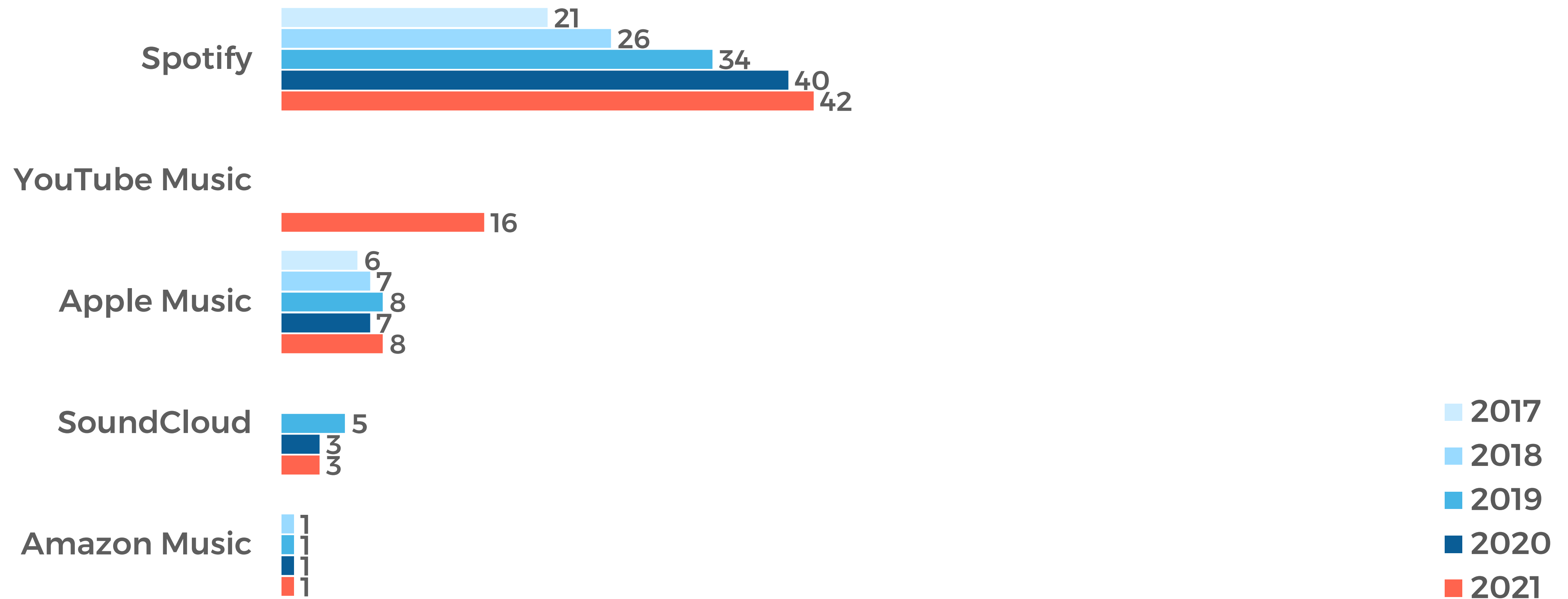
BASE: AUSTRALIAN 12+ AND LISTENED TO ONLINE AUDIO STREAMING SERVICE IN LAST MONTH



Weekly Listening to Online Audio Streaming Services

TOTAL AUSTRALIAN POPULATION 12+

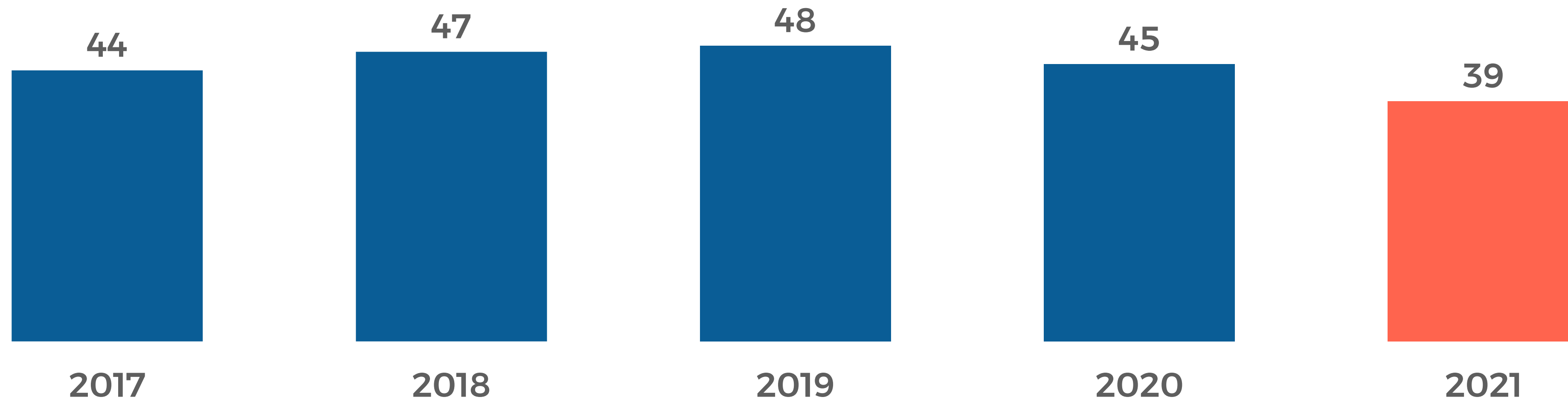
% LISTENED TO ONLINE AUDIO STREAMING SERVICE IN LAST WEEK



Weekly Usage of YouTube for Music or Music Video

TOTAL AUSTRALIAN POPULATION 12+

% USED YOUTUBE FOR MUSIC OR MUSIC VIDEOS IN LAST WEEK



Observations

- Despite the disruptions of 2020, or more likely on account of the disruptions, digital audio options grew at a significant pace

Observations

- Podcasts make a big leap forward in Australia, now just mere months behind the figures we see in the USA and Canada

Observations

- Smart Speakers also have a big year, likely propelled at least in part by people staying in their homes more
- Coming soon – the Smart Audio Report Australia

Observations

- Despite the advancements in digital usage and the disruptions of the last year, broadcast radio and its content continues to serve enormous numbers of Australians each week and month

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