



 THE INFINITE DIAL® 2019

The Infinite Dial® Germany

#InfiniteDial

Study Overview

- ▶ The Infinite Dial is the longest-running survey of digital media consumer behavior in America
- ▶ The Infinite Dial Germany 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
- ▶ The premier Infinite Dial Germany report explores the penetration of online digital audio and social media in Germany, as well as the online platforms and technologies that Germans are using
- ▶ This study is designed to allow for direct comparisons between the German and U.S. markets

Study Methodology

- ▶ In the July of 2019, Edison Research conducted a national telephone survey of 1,000 Germans aged 16 and older
- ▶ Data weighted to national 16+ population figures

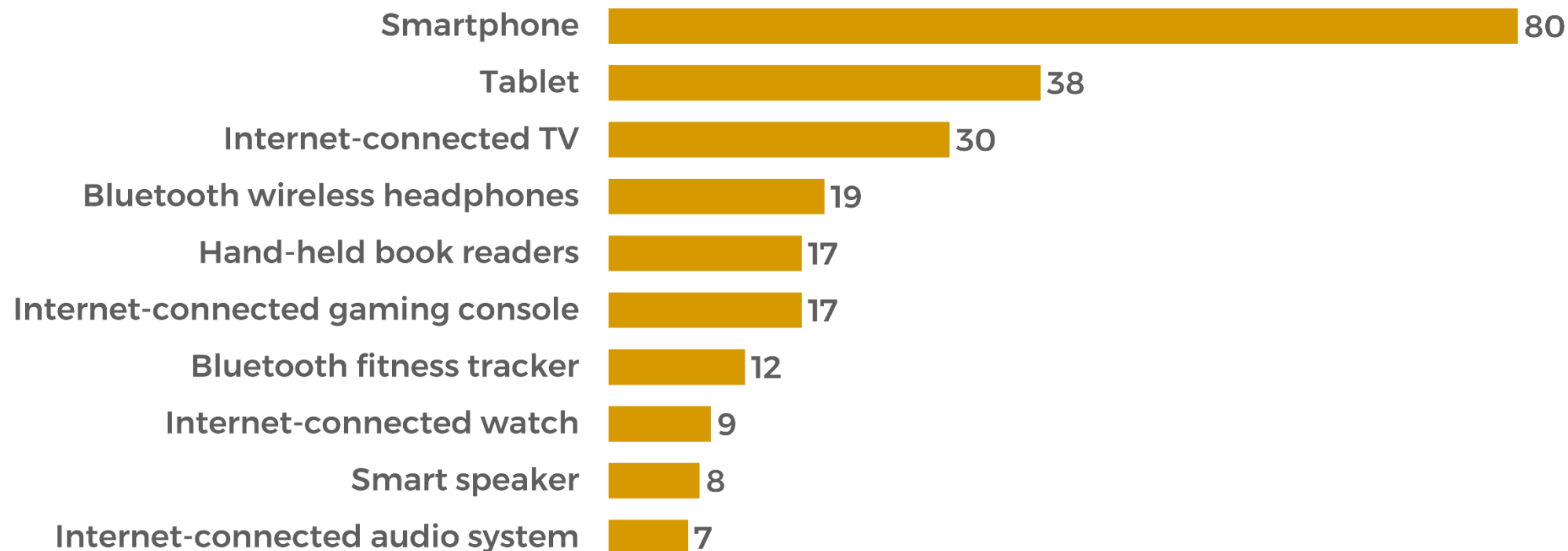
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Devices & Technologies

Device Ownership in Germany

TOTAL GERMAN POPULATION 16+

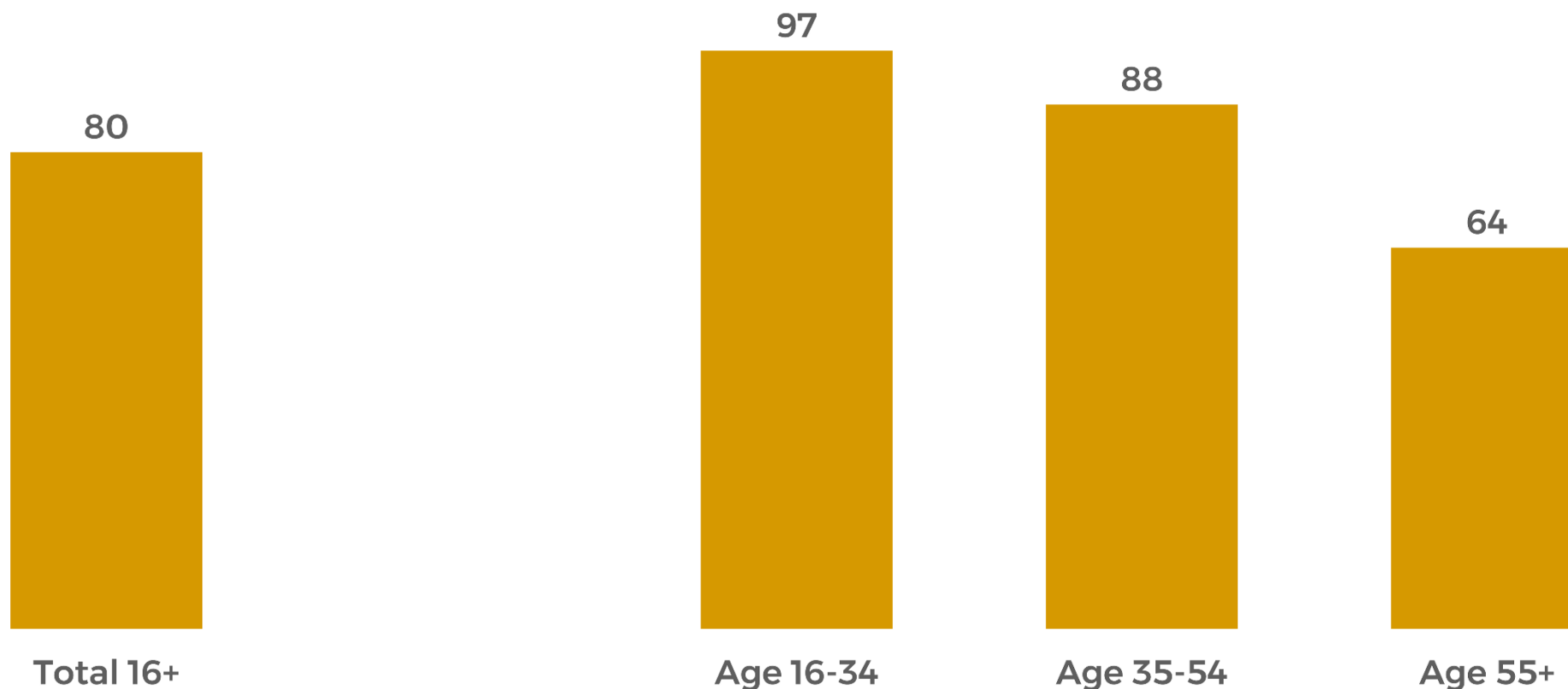
% OWNING DEVICE



Smartphone Ownership in Germany

TOTAL GERMAN POPULATION 16+

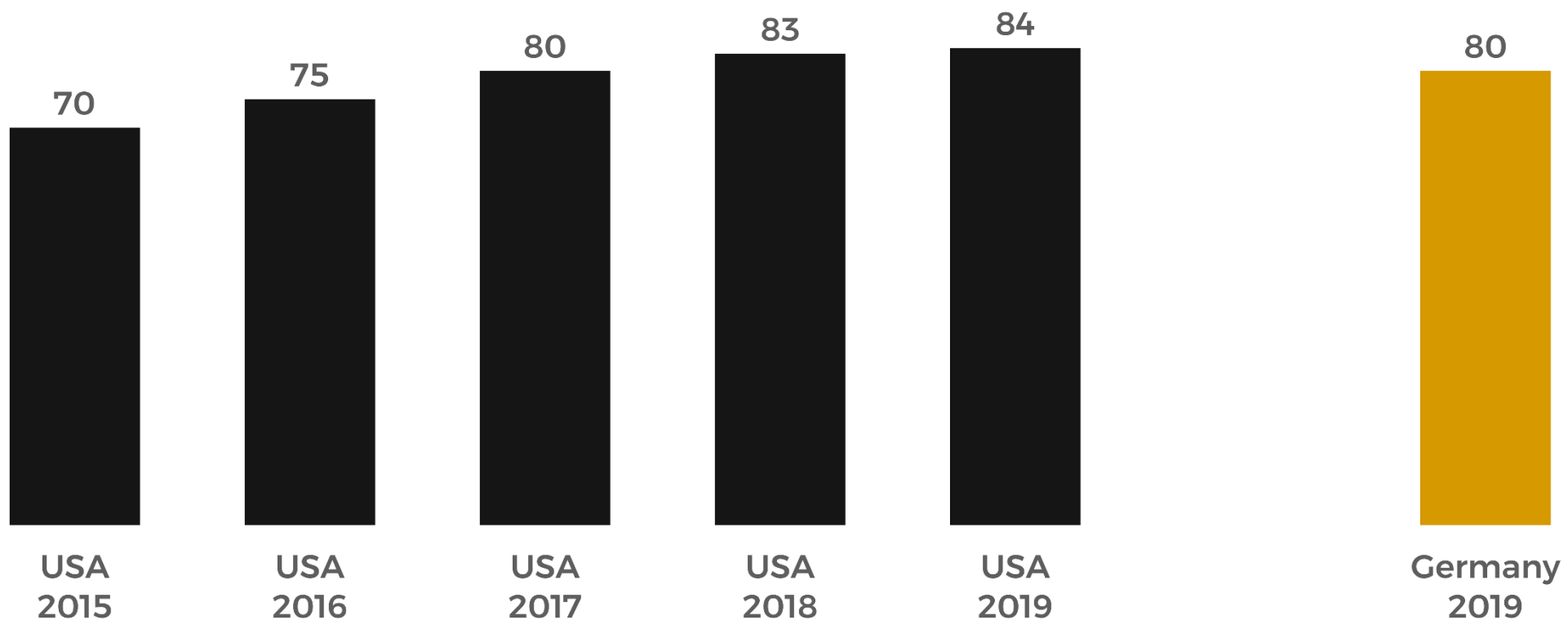
% OWNING A SMARTPHONE



Smartphone Ownership

TOTAL POPULATION 16+

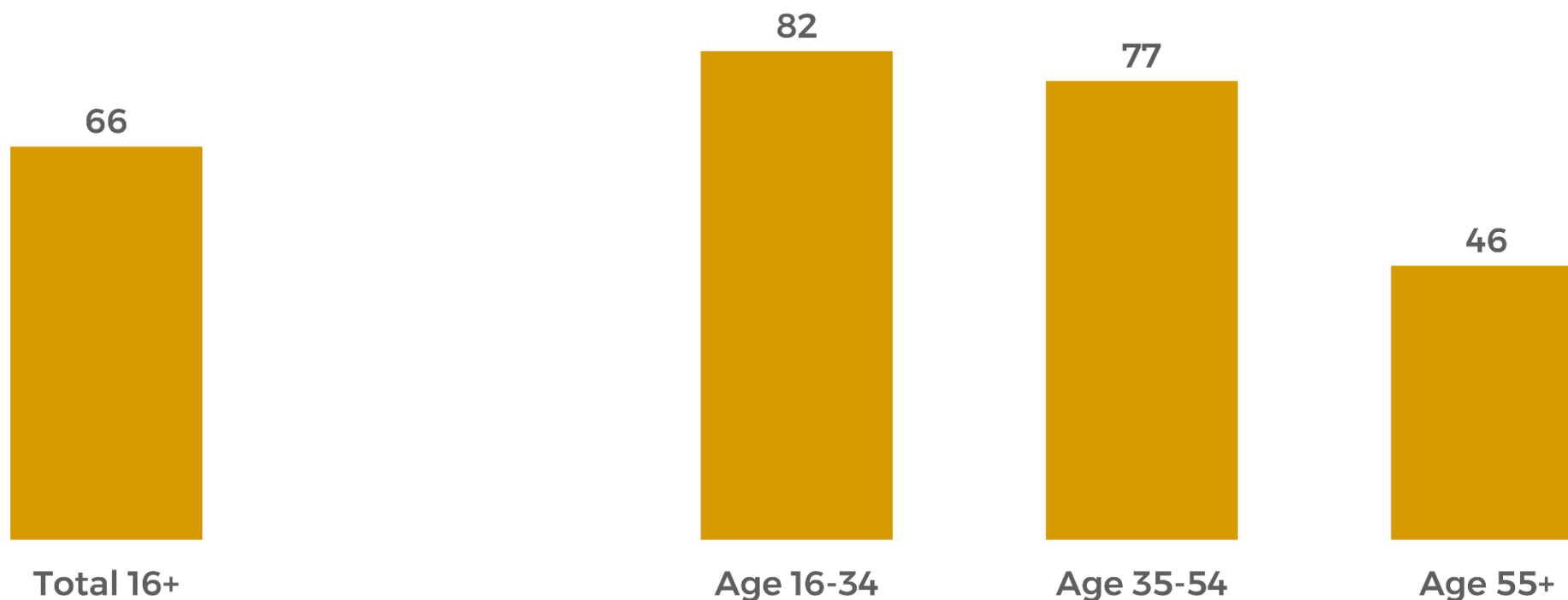
% OWNING A SMARTPHONE



Smart Speaker Awareness in Germany

TOTAL GERMAN POPULATION 16+

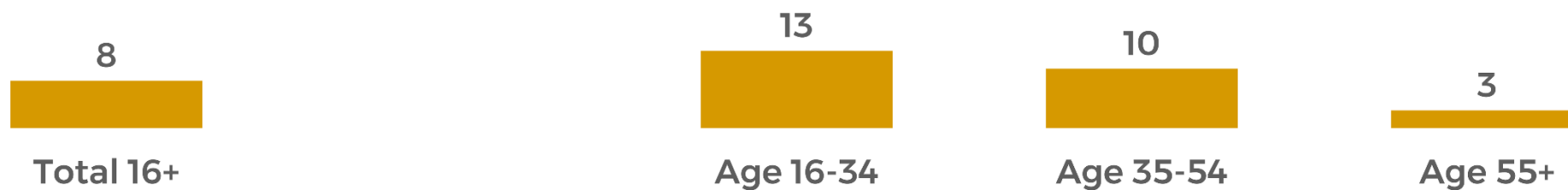
% AWARE OF ANY SMART SPEAKER BRAND



Smart Speaker Ownership in Germany

TOTAL GERMAN POPULATION 16+

% OWNING A SMART SPEAKER



Smart Speaker Ownership

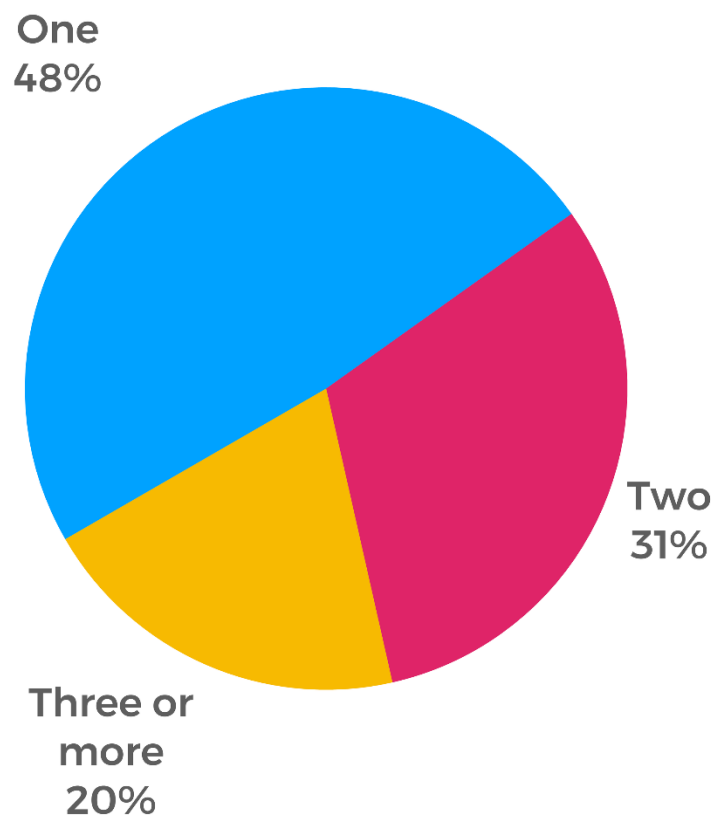
TOTAL POPULATION 16+

% OWNING A SMART SPEAKER



Number of Smart Speakers in German Households

BASE: AGE 16+ AND OWN A SMART SPEAKER



Smart speaker owners in Germany own an average of

1.8 smart speakers

Usage of Voice-Operated Personal Assistant on Devices

TOTAL GERMAN POPULATION 16+

% CURRENTLY EVER USE A VOICE-OPERATED PERSONAL ASSISTANT ON DEVICE

Use at least one voice-operated personal assistant on device 20

Smartphone 14

Tablet 6

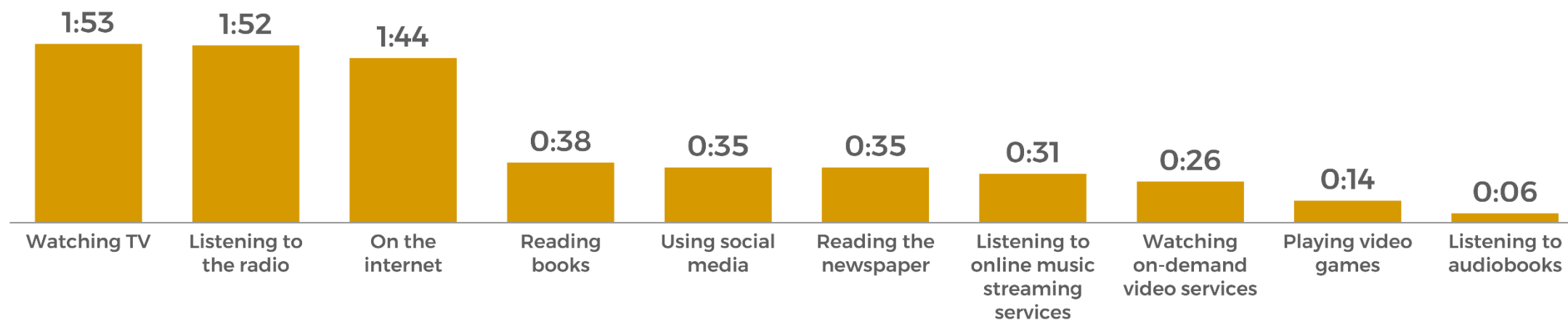
Computer/Laptop 6

Smart speaker 5

Average Time Spent with Media in Past 24 Hours in Germany

TOTAL GERMAN POPULATION 16+ INCLUDING USERS AND NON-USERS TO EACH MEDIUM

HOURS:MINUTES



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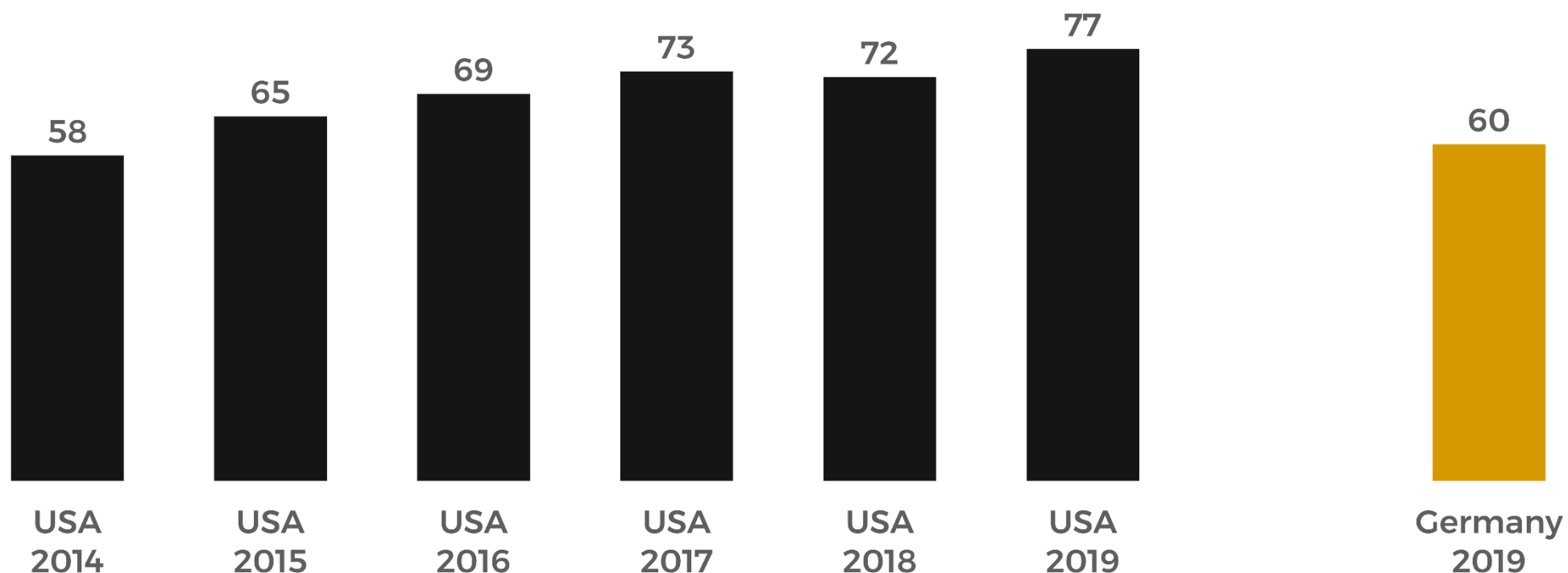
Online Audio

Monthly Online Audio Listening

TOTAL POPULATION 16+

% LISTENING TO ONLINE AUDIO IN LAST MONTH

ONLINE AUDIO = LISTENING TO RADIO STATIONS ONLINE, LISTENING TO STREAMED AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET, AND/OR LISTENING TO YOUTUBE FOR MUSIC OR MUSIC VIDEOS

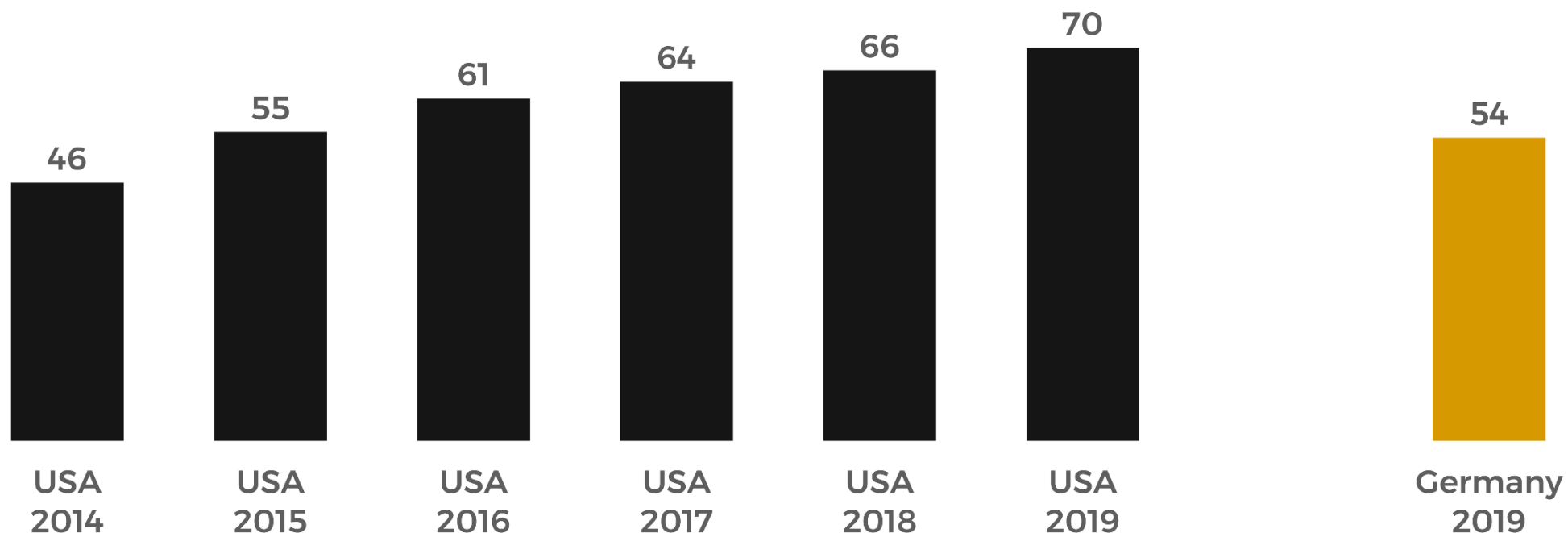


Weekly Online Audio Listening

TOTAL POPULATION 16+

% LISTENING TO ONLINE AUDIO IN LAST WEEK

ONLINE AUDIO = LISTENING TO RADIO STATIONS ONLINE, LISTENING TO STREAMED AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET, AND/OR LISTENING TO YOUTUBE FOR MUSIC OR MUSIC VIDEOS



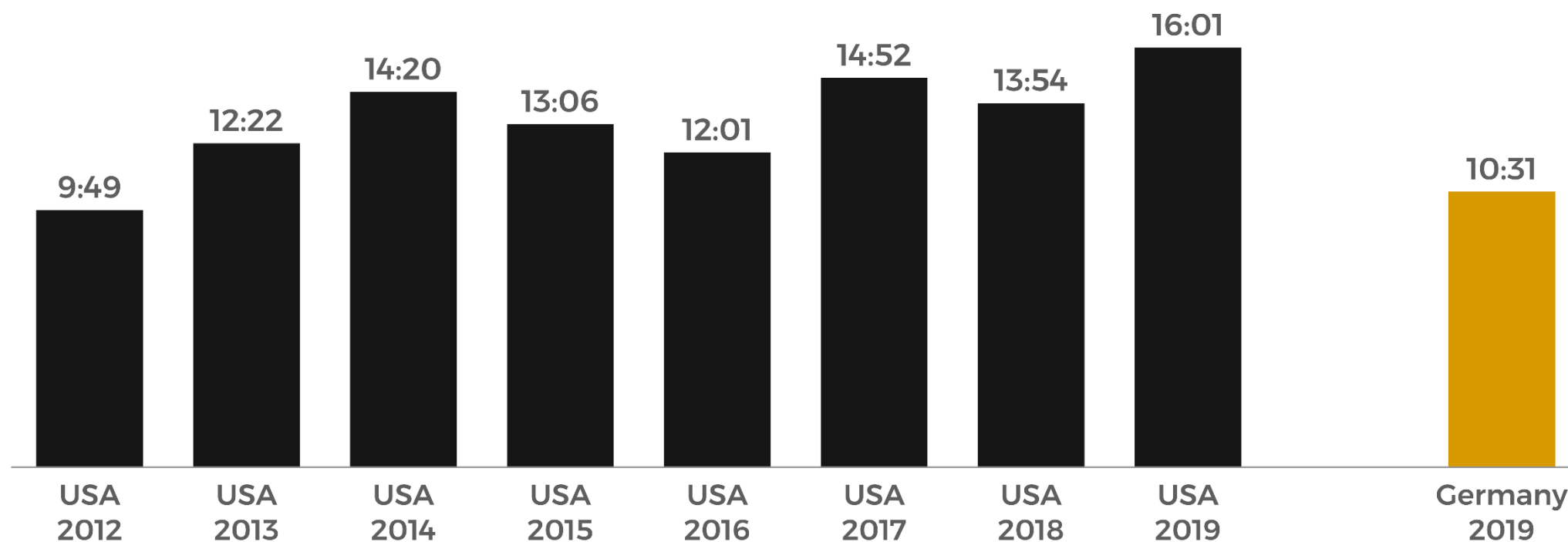
Average Time Spent Listening to Online Audio

BASE: AGE 16+ AND LISTENED TO ONLINE AUDIO IN LAST WEEK

HOURS:MINUTES IN LAST WEEK

AMONG USERS OF ONLINE AUDIO

ONLINE AUDIO = LISTENING TO RADIO STATIONS ONLINE, LISTENING TO STREAMED AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET, AND/OR LISTENING TO YOUTUBE FOR MUSIC OR MUSIC VIDEOS



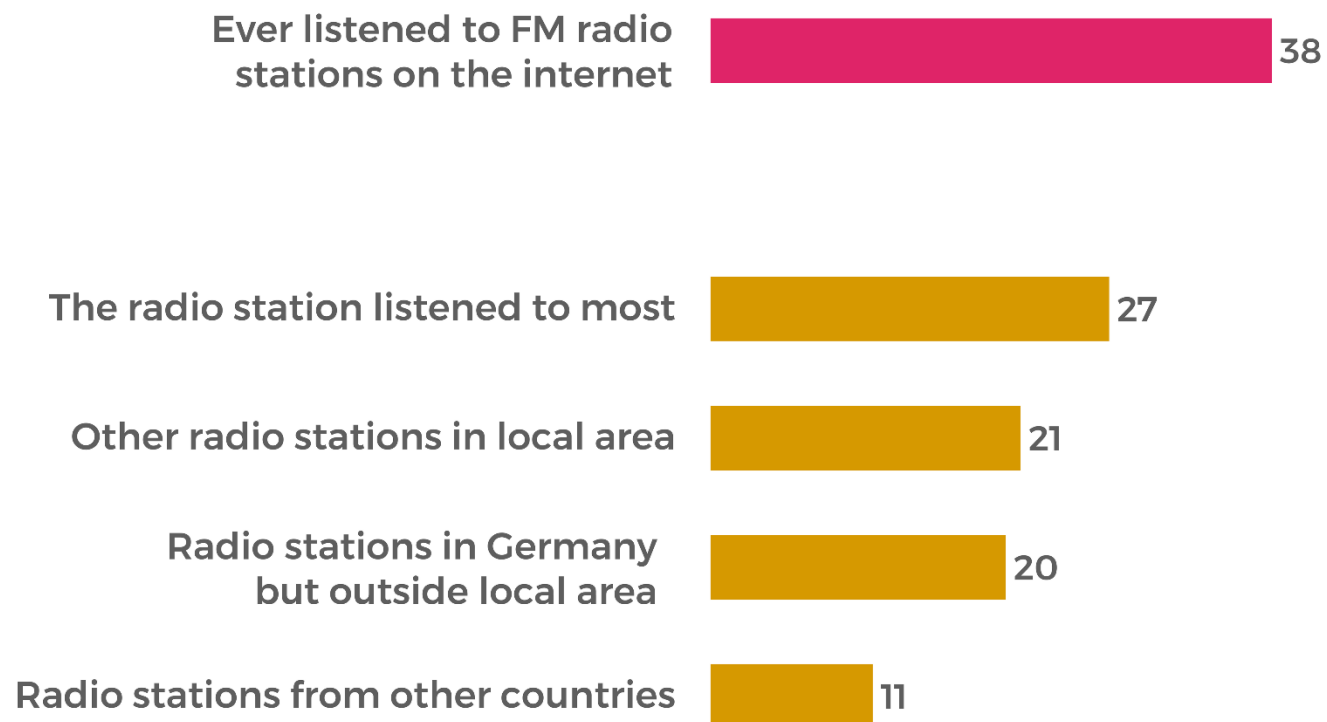
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FM Radio Streaming

Types of Radio Listening through the Internet in Germany

TOTAL GERMAN POPULATION 16+

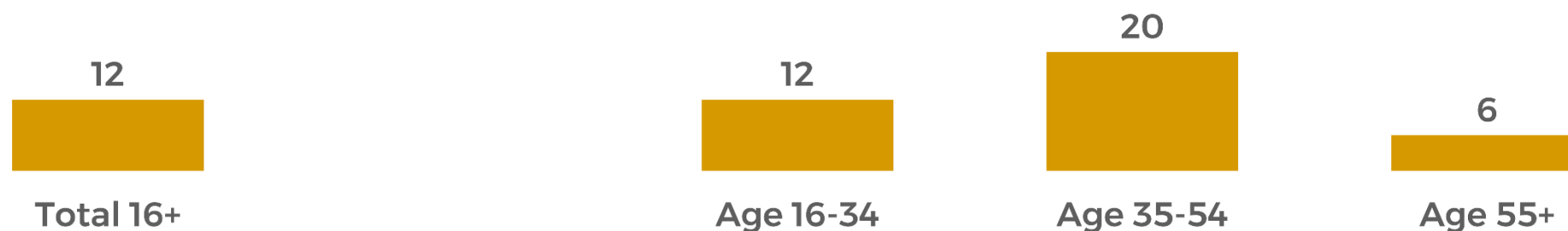
% EVER LISTENED



Listening to Streaming Radio in the Last Week in Germany

TOTAL GERMAN POPULATION 16+

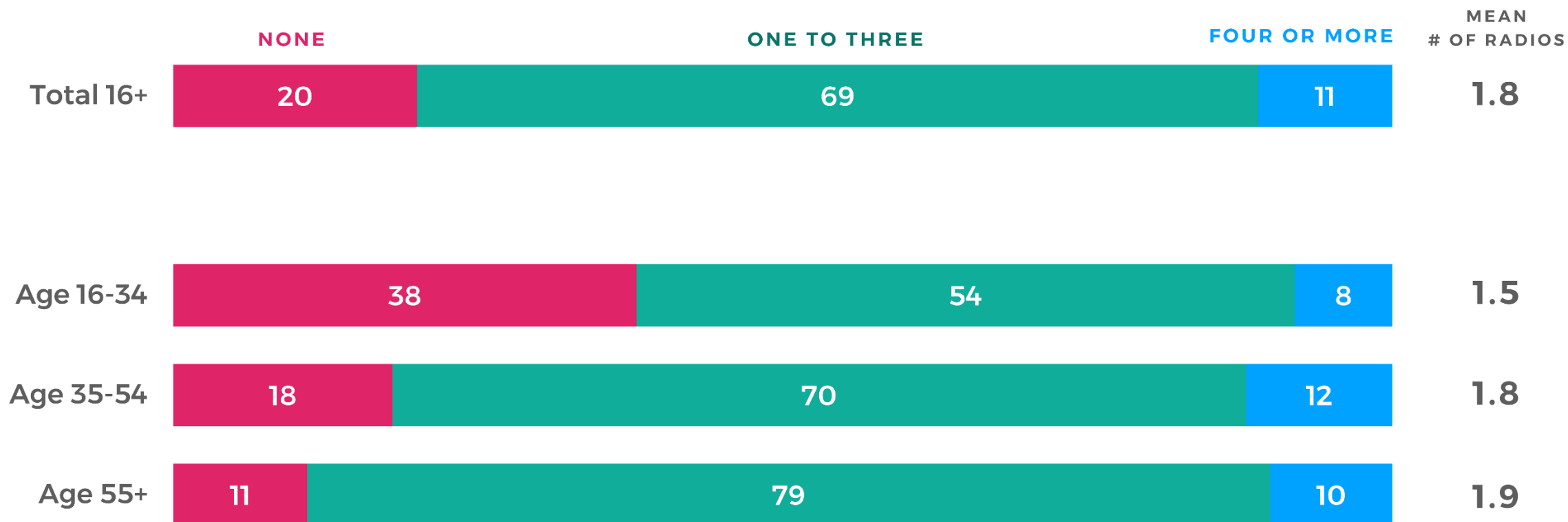
% LISTENED TO RADIO CONTENT OVER THE INTERNET IN THE LAST WEEK



Number of Radios in German Households

TOTAL GERMAN POPULATION 16+

% OWNING NUMBER OF RADIOS



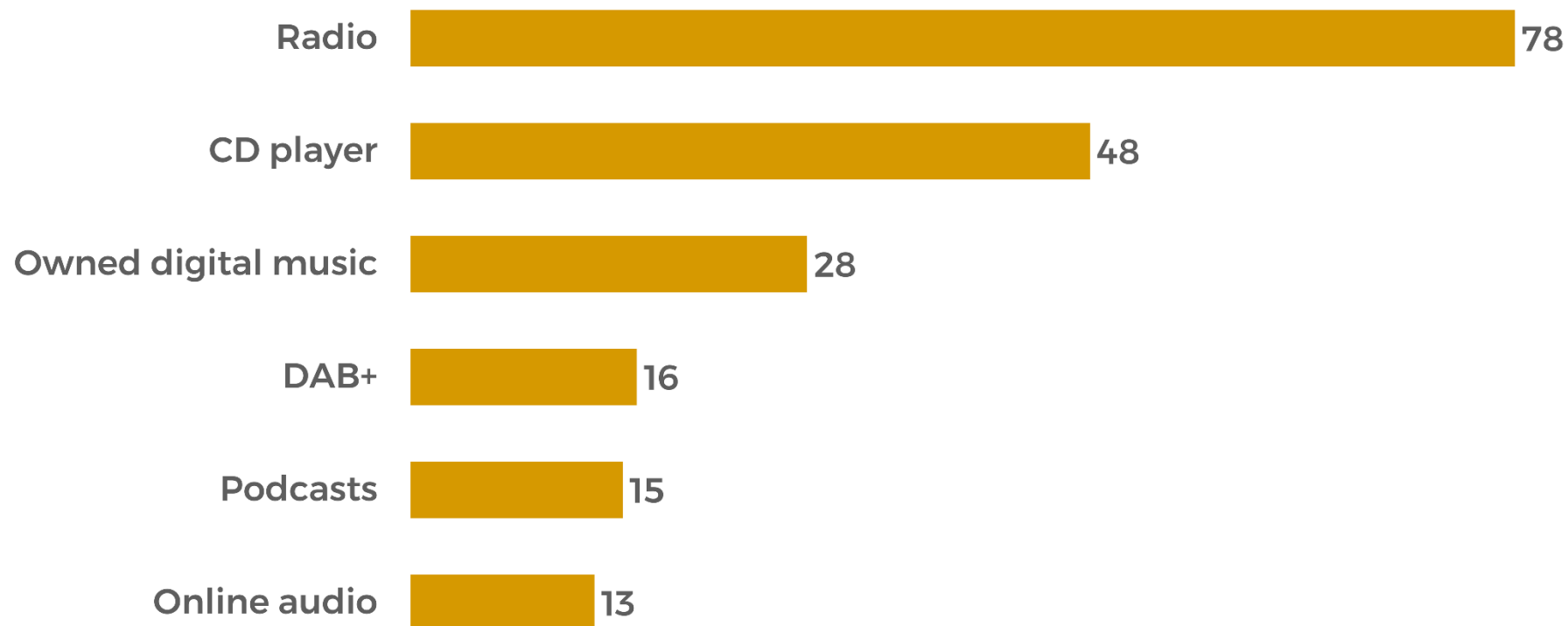
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In-Car Media

Audio Sources Used in Car in Germany

BASE: AGE 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 89%

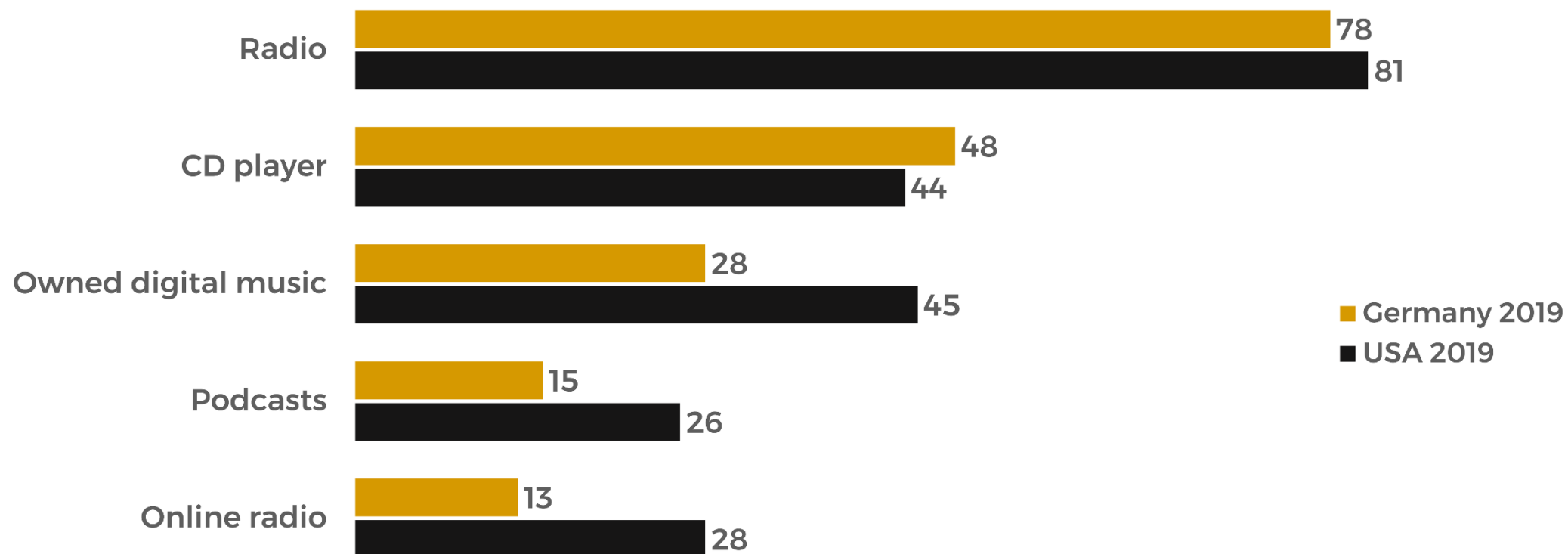
% USING AUDIO SOURCE IN CAR



Audio Sources Used in Car

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

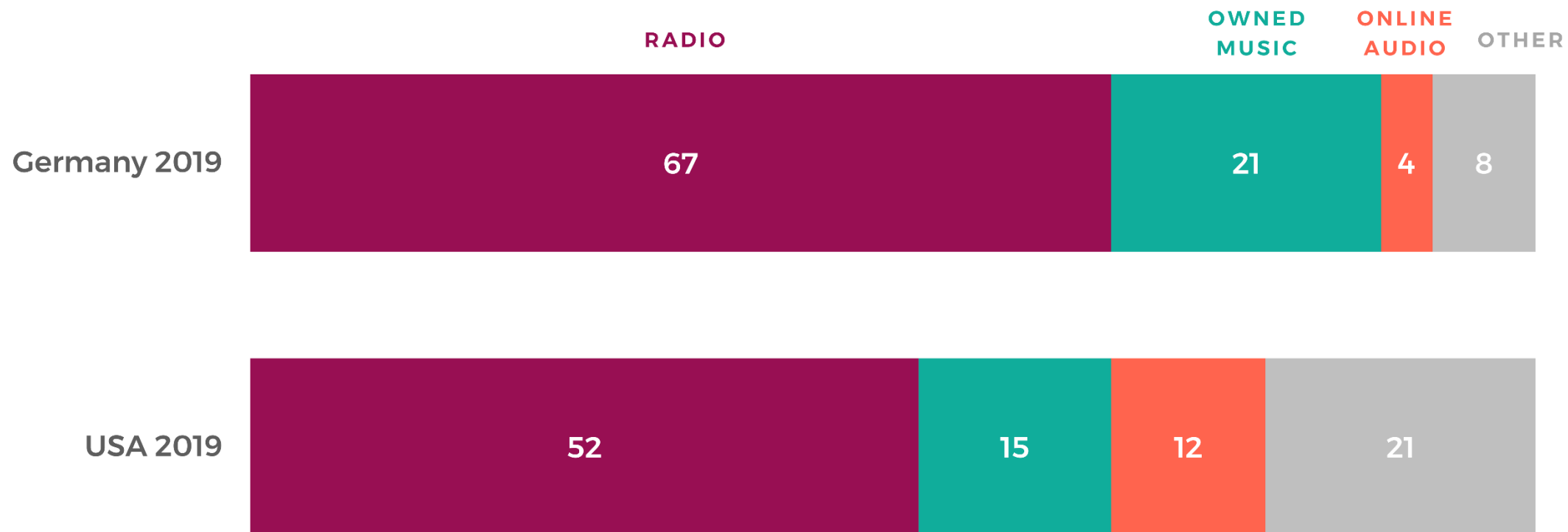
% USING AUDIO SOURCE IN CAR



Audio Source Used Most Often in Car in Germany

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

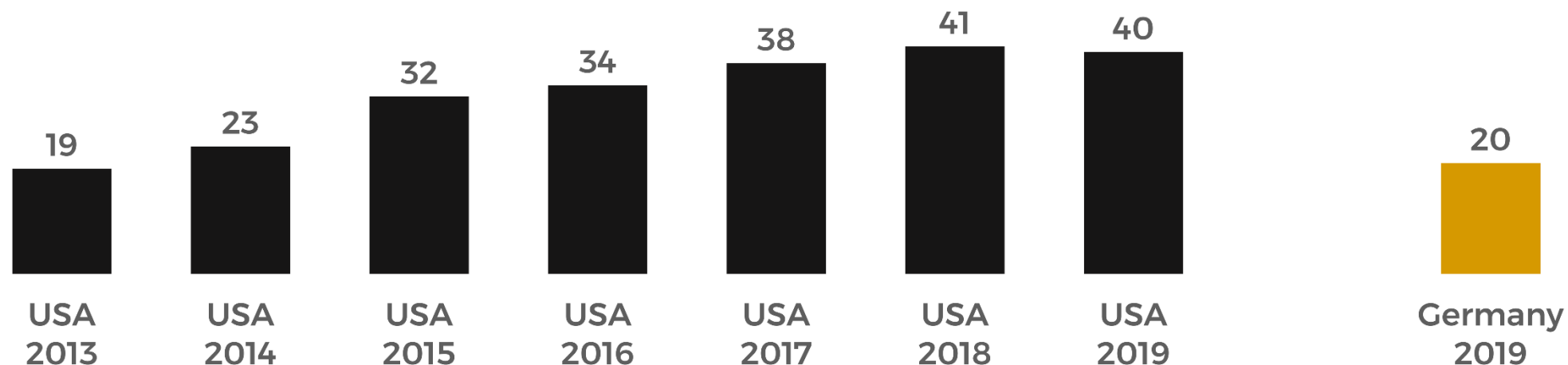
% USING AUDIO SOURCE MOST OFTEN IN CAR



Online Audio Listening in Car Through a Mobile Phone

TOTAL POPULATION 16+

% EVER LISTENED TO ONLINE AUDIO IN A CAR THROUGH A MOBILE PHONE





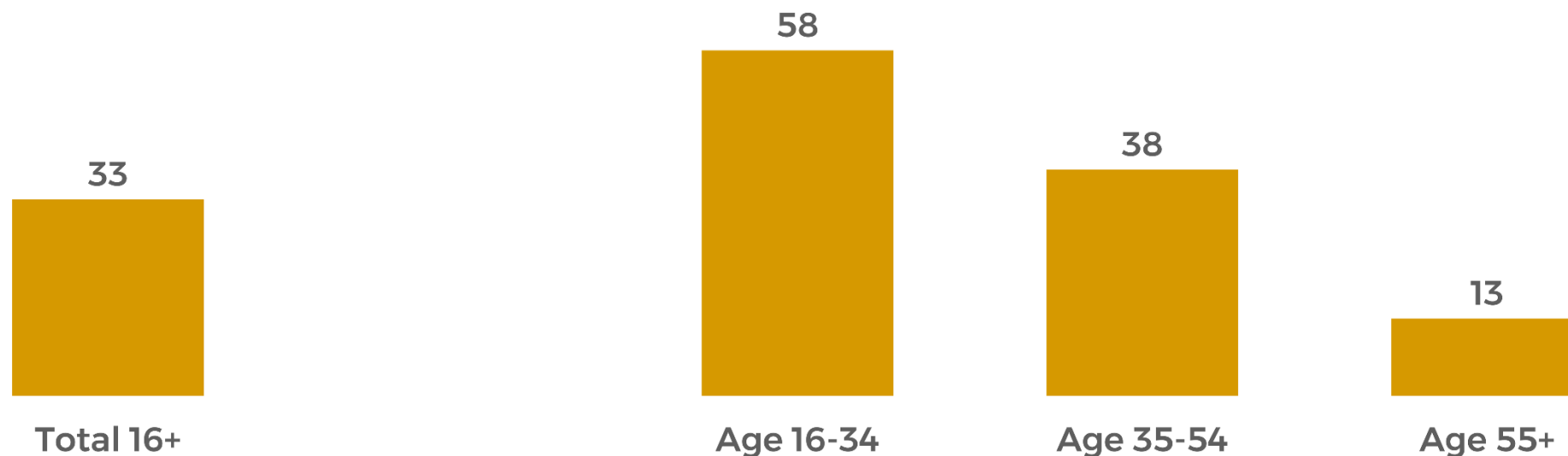
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Podcasting

Podcast Listening in Germany

TOTAL GERMAN POPULATION 16+

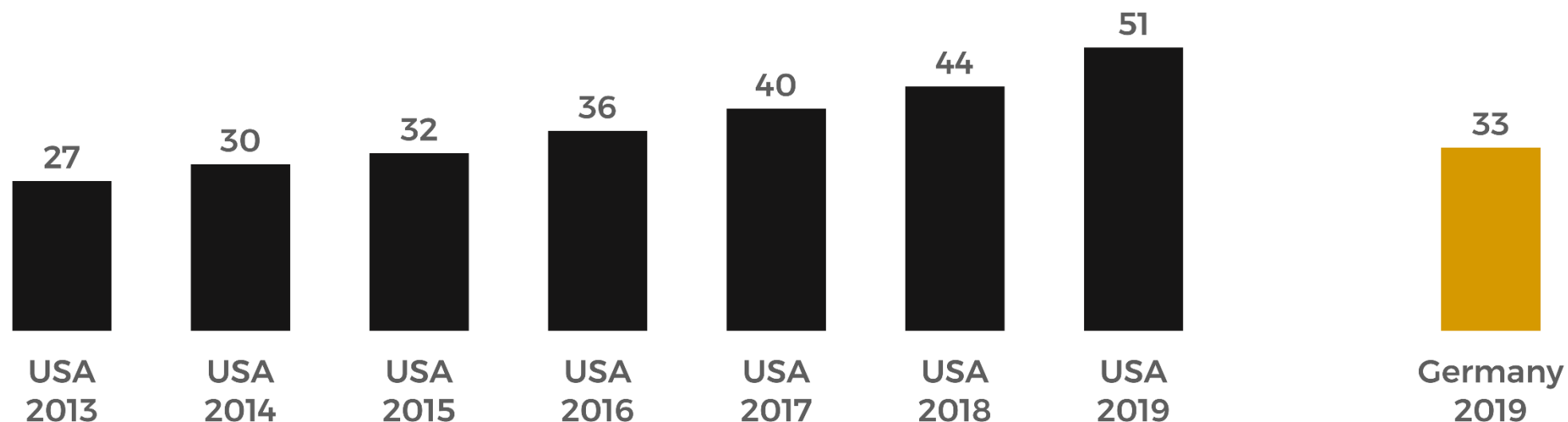
% EVER LISTENED TO A PODCAST



Podcast Listening

TOTAL POPULATION 16+

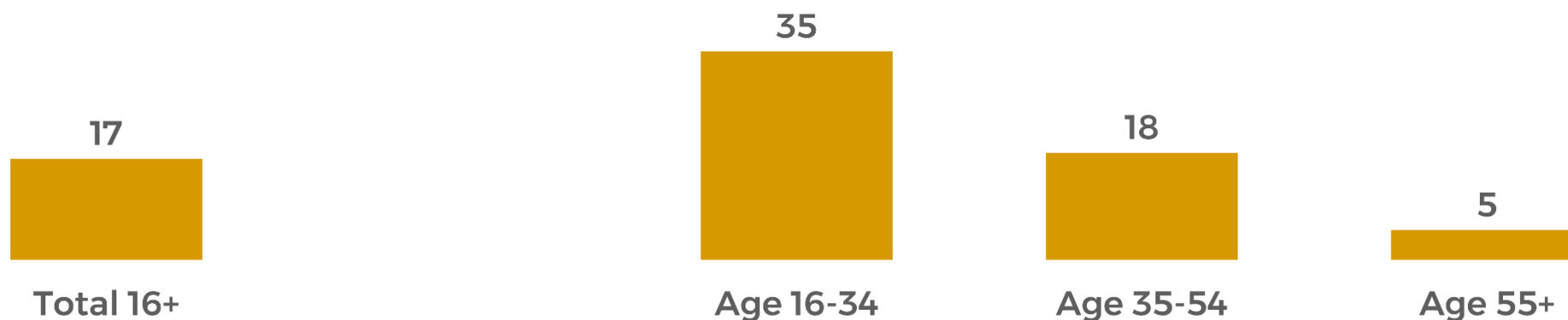
% EVER LISTENED TO A PODCAST



Monthly Podcast Listening in Germany

TOTAL GERMAN POPULATION 16+

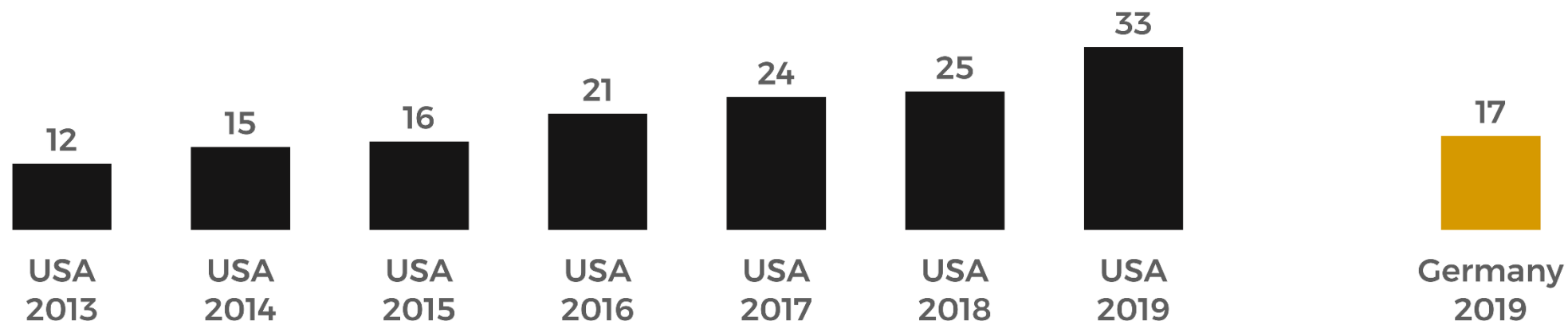
% LISTENED TO A PODCAST IN LAST MONTH



Monthly Podcast Listening

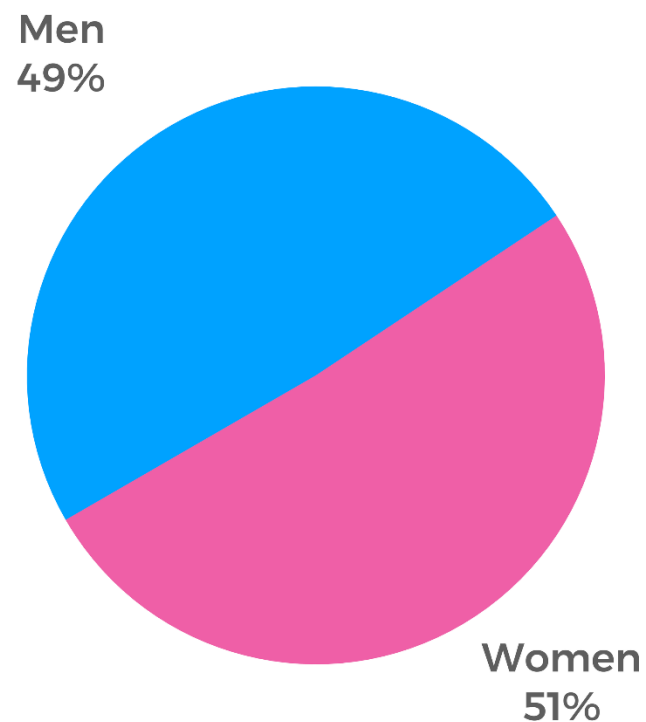
TOTAL POPULATION 16+

% LISTENED TO A PODCAST IN LAST MONTH

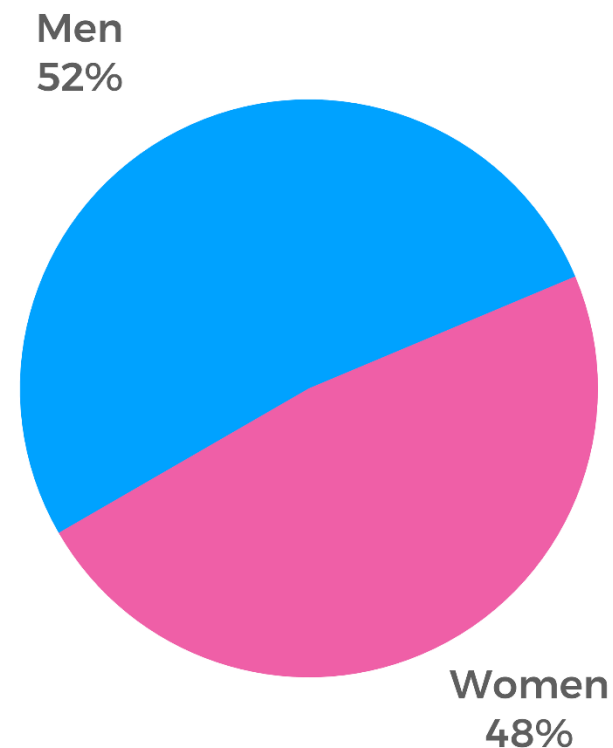


Composition of Monthly Podcast Listeners

GERMAN POPULATION 16+

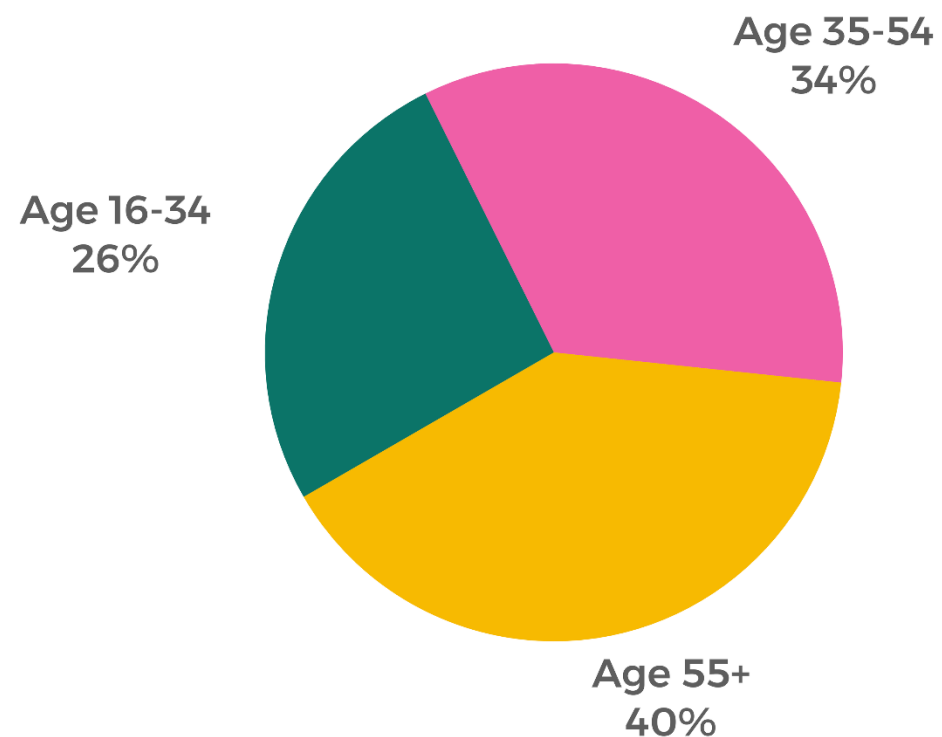


MONTHLY PODCAST CONSUMERS 16+

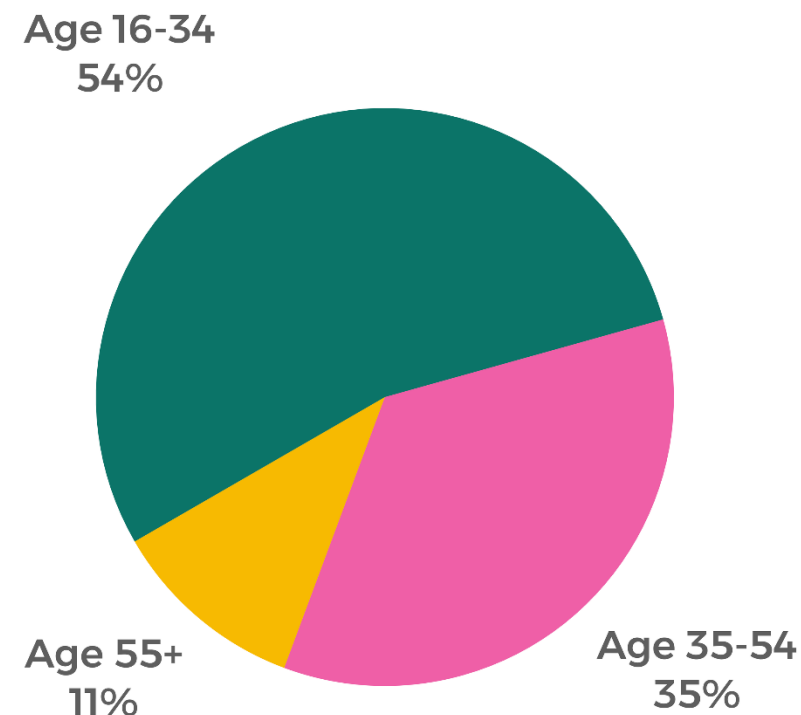


Composition of Monthly Podcast Listeners

GERMAN POPULATION 16+



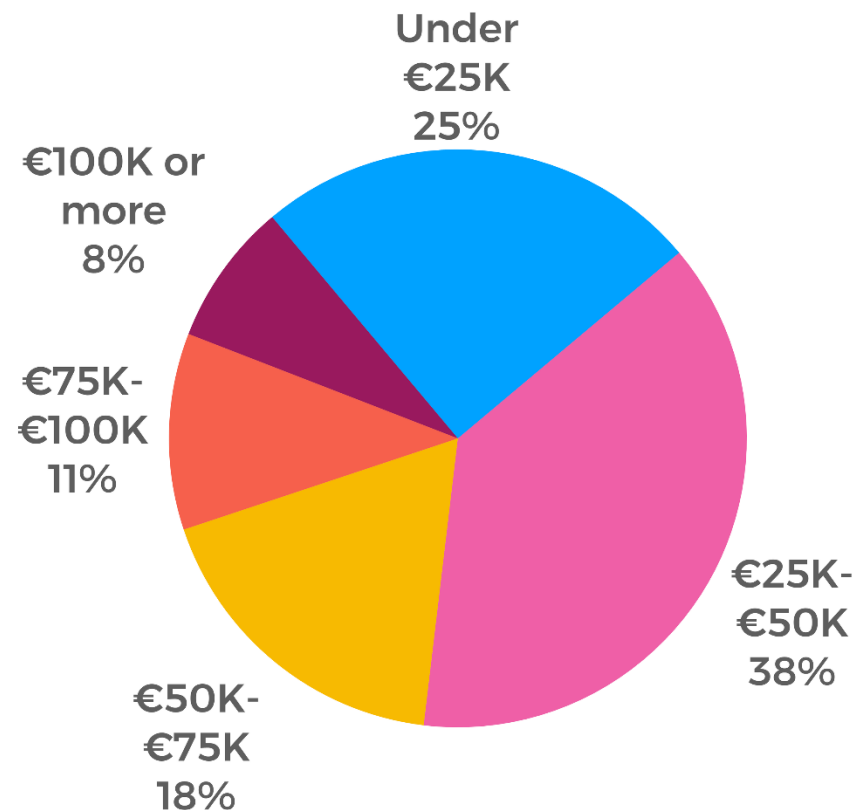
MONTHLY PODCAST CONSUMERS 16+



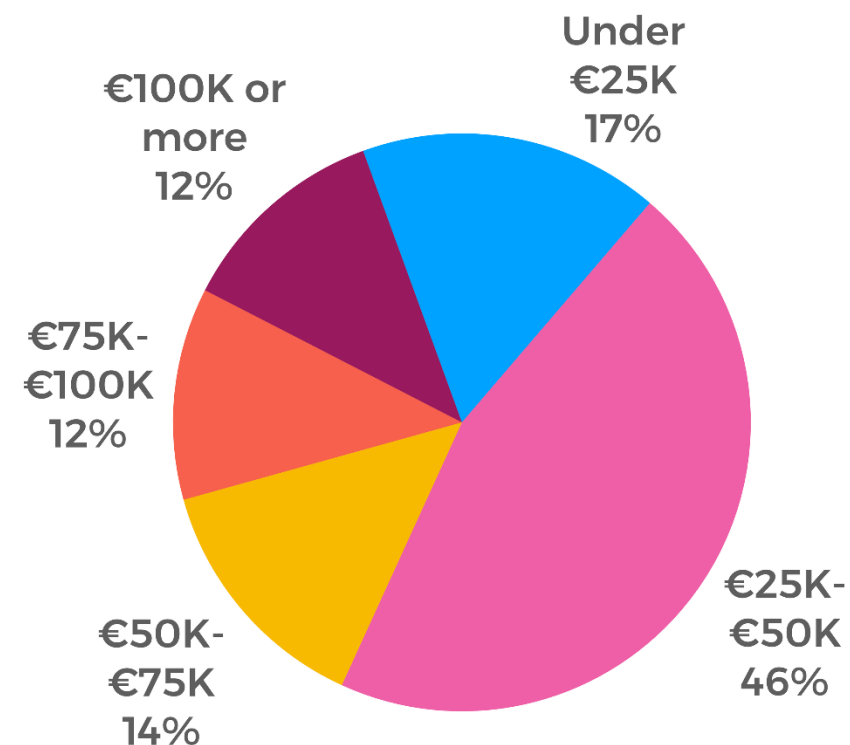
Composition of Monthly Podcast Listeners

ANNUAL HOUSEHOLD INCOME

GERMAN POPULATION 16+



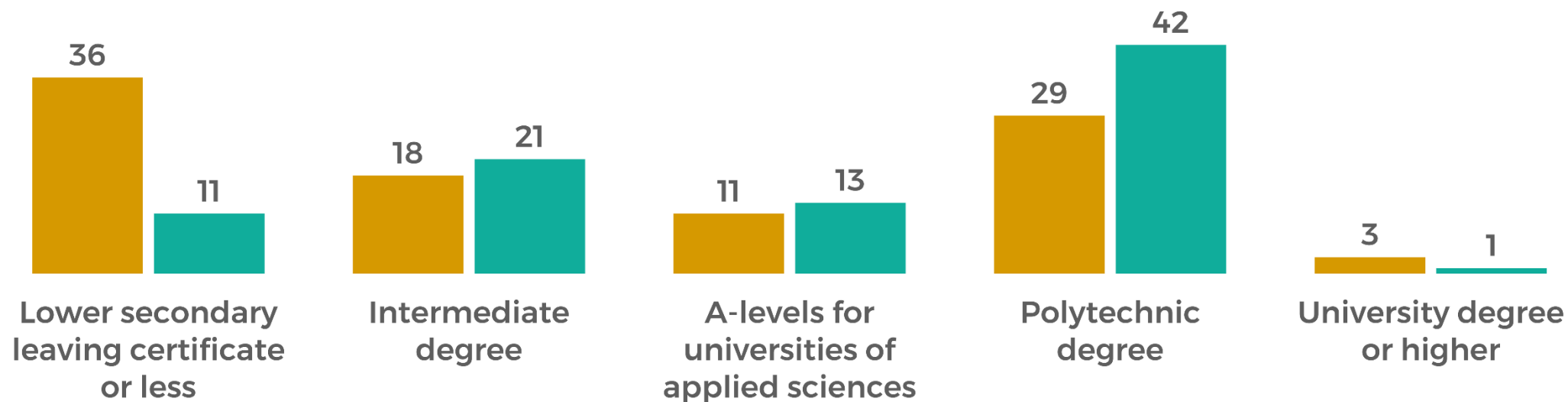
MONTHLY PODCAST CONSUMERS 16+



Composition of Monthly Podcast Listeners

EDUCATIONAL ATTAINMENT

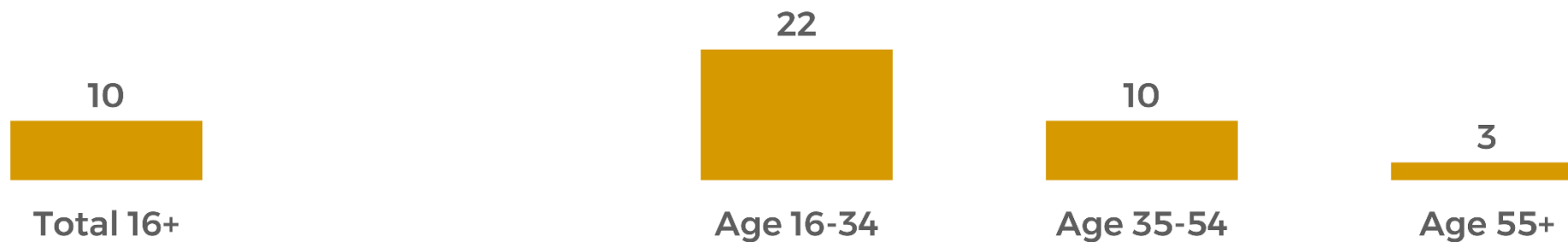
■ German Population 18+ ■ Monthly Podcast Consumers 18+



Weekly Podcast Listening in Germany

TOTAL GERMAN POPULATION 16+

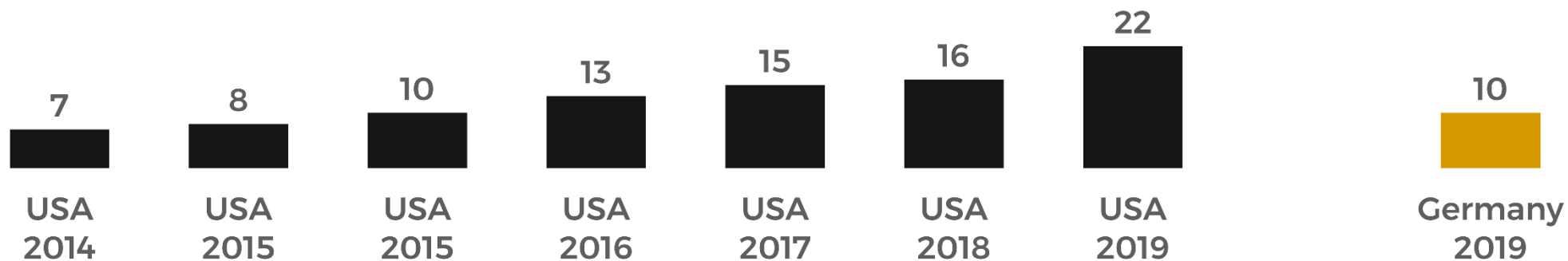
% LISTENED TO A PODCAST IN LAST WEEK



Weekly Podcast Listening

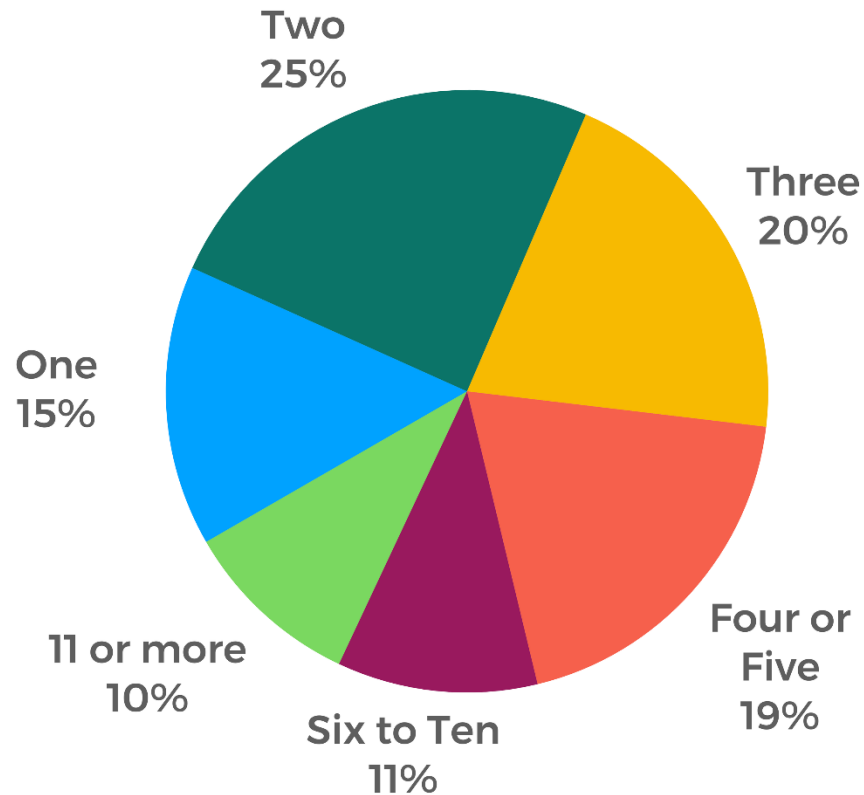
TOTAL POPULATION 16+

% LISTENED TO A PODCAST IN LAST WEEK



Number of Podcasts Listened to in Last Week in Germany

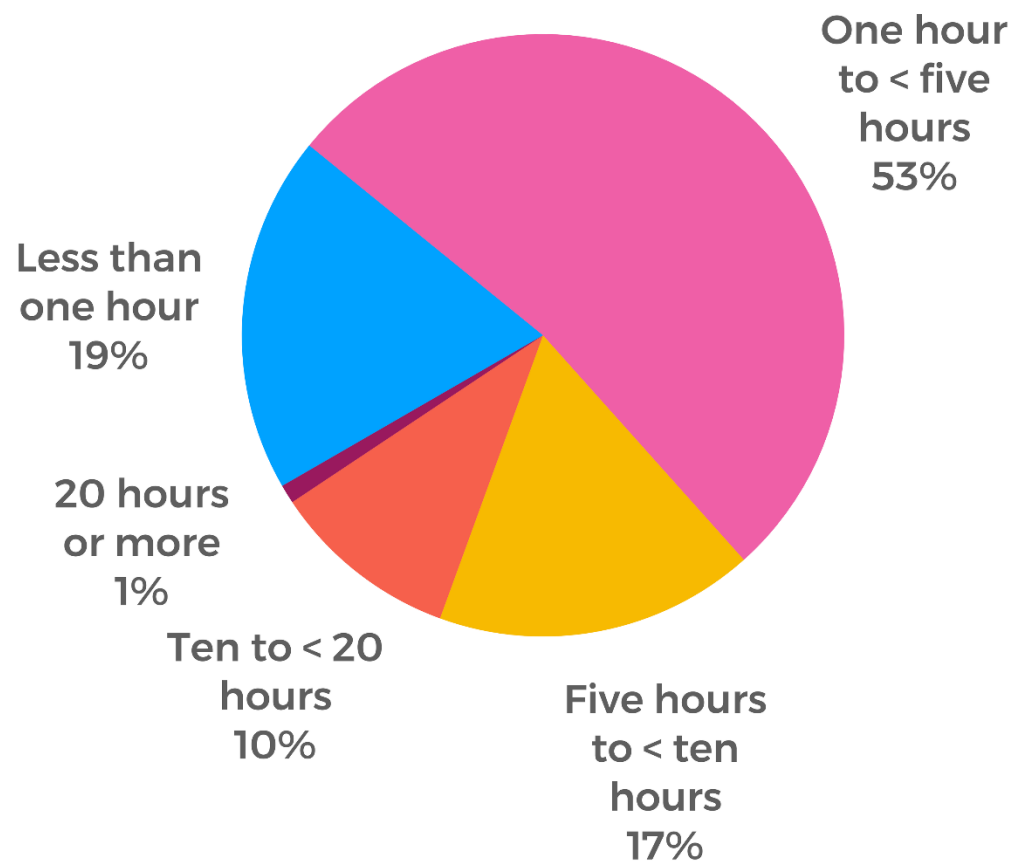
BASE: AGE 16+ AND LISTENED TO PODCAST IN LAST WEEK



German weekly podcast listeners averaged
five podcasts
 in the last week

Time Spent Listening to Podcasts in Last Week in Germany

BASE: AGE 16+ AND LISTENED TO PODCAST IN LAST WEEK

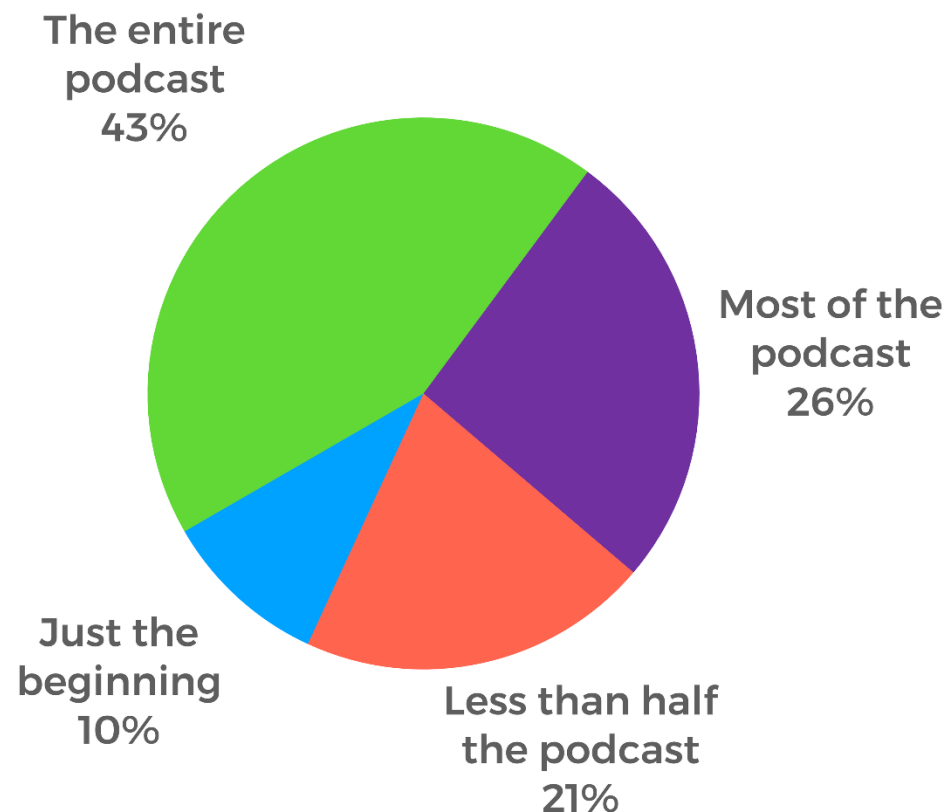


German weekly podcast listeners averaged
3 hours 49 minutes
 of listening in the last week

Amount of Podcast Episode Typically Listened to in Germany

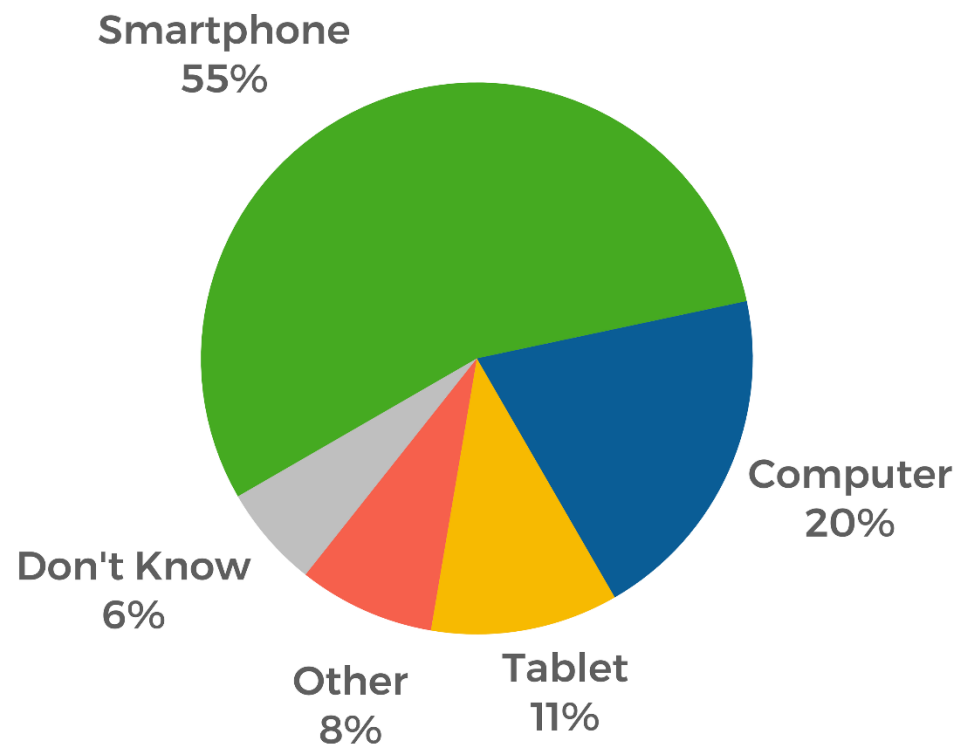
BASE: AGE 16+ AND EVER LISTENED TO A PODCAST

"Think about the podcast episodes you listen to. Do you typically listen to...?"



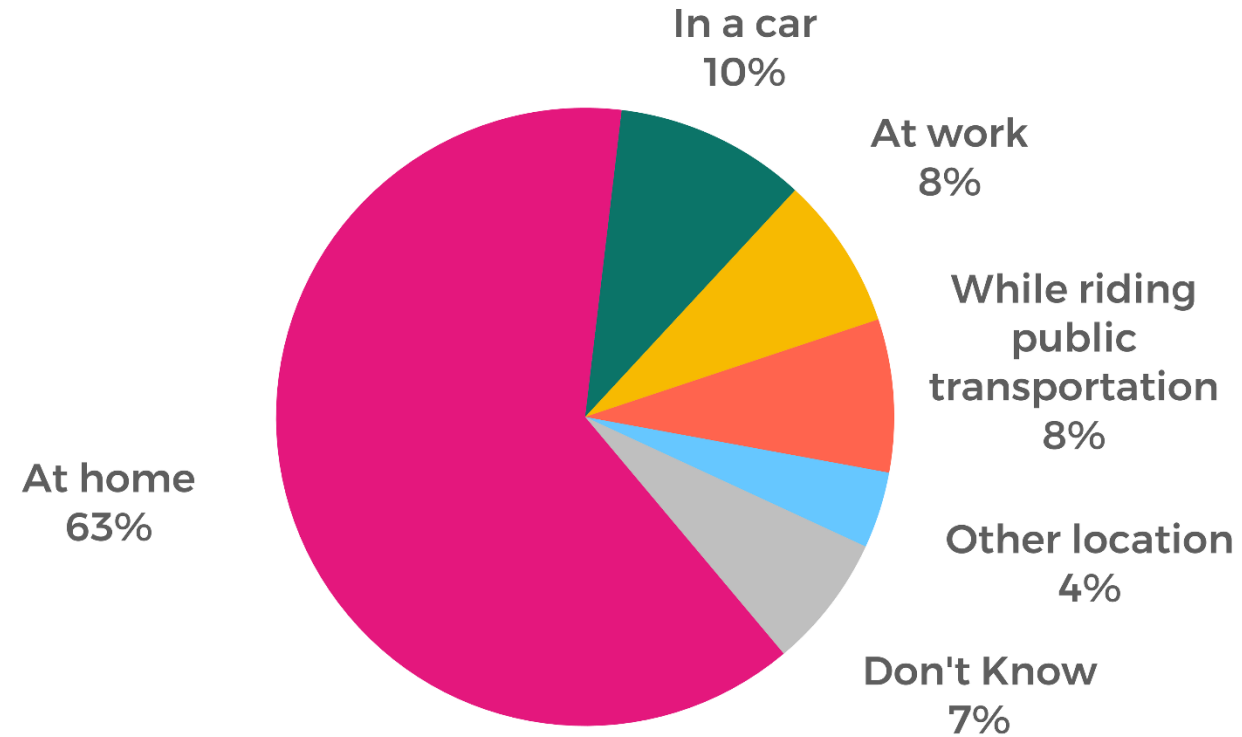
Device Used Most Often to Listen to Podcasts in Germany

BASE: AGE 16+ AND EVER LISTENED TO A PODCAST



Location Where Podcasts are Listened to Most Often in Germany

BASE: AGE 16+ AND EVER LISTENED TO A PODCAST



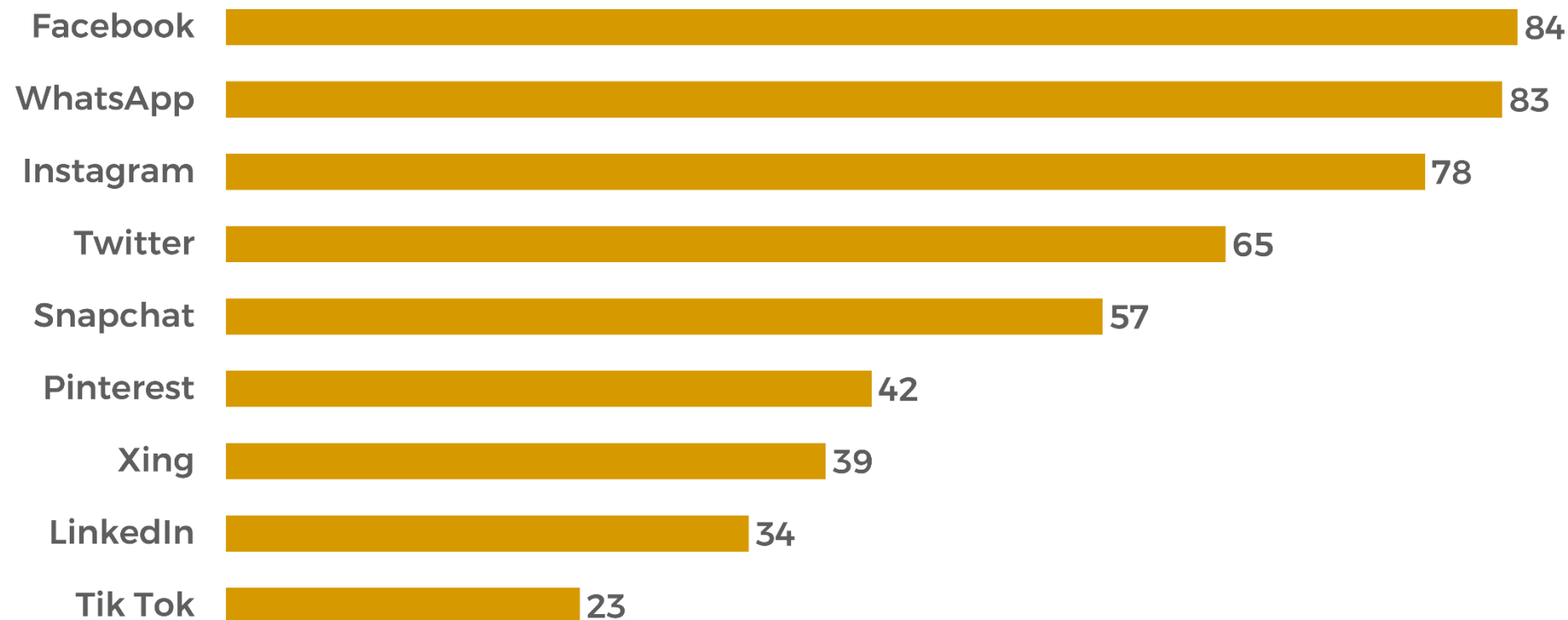
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Social Media

Social Media Brand Awareness in Germany

TOTAL GERMAN POPULATION 16+

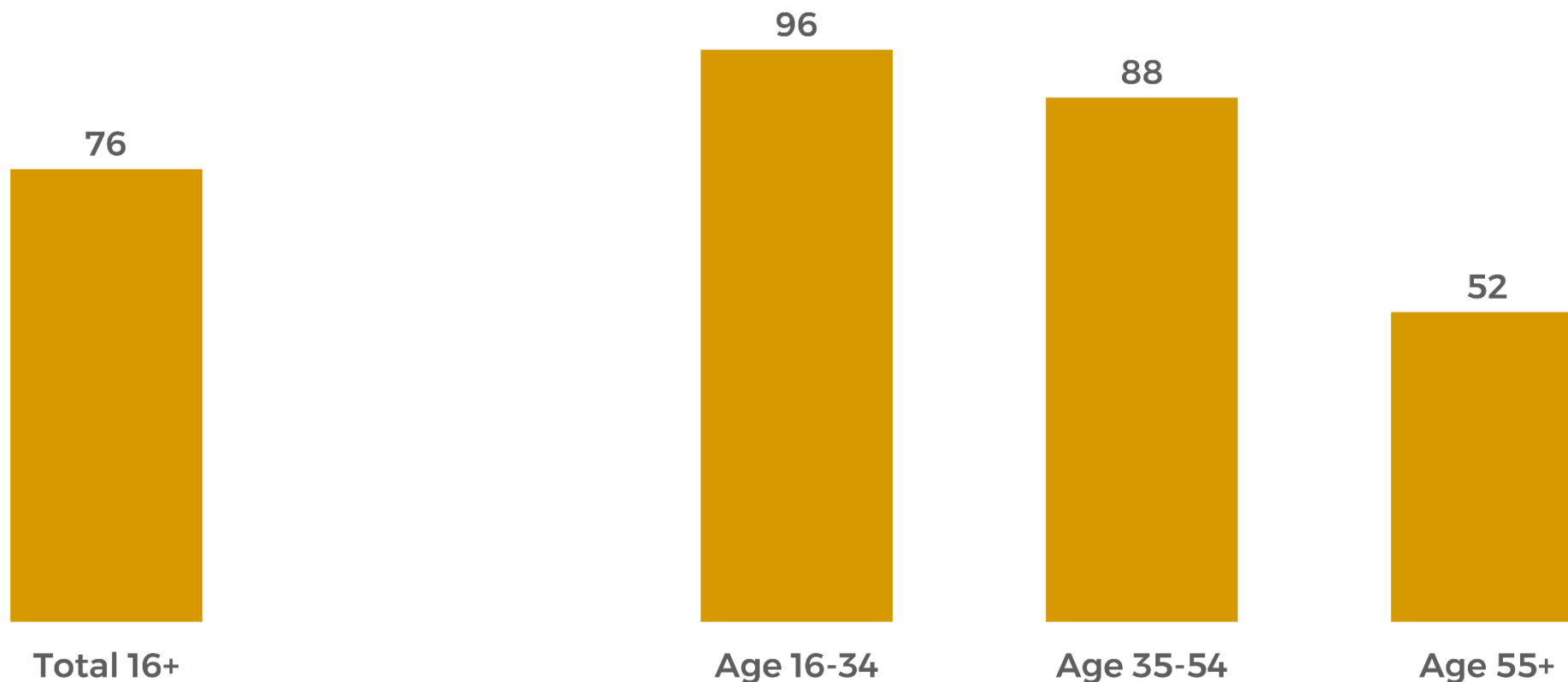
% AWARE OF SOCIAL MEDIA BRAND



Social Media Usage in Germany

TOTAL GERMAN POPULATION 16+

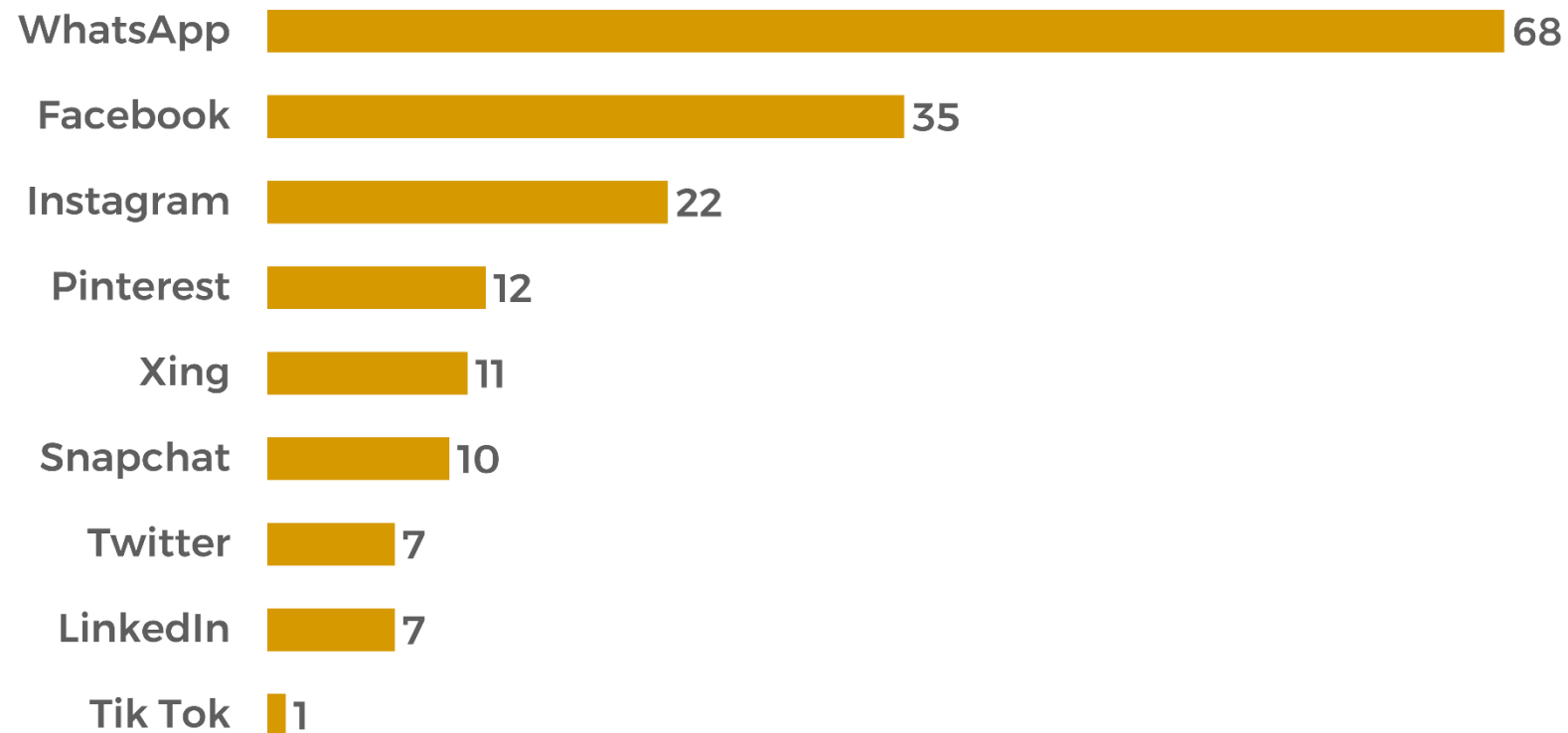
% USING SOCIAL MEDIA



Social Media Brand Usage in Germany

TOTAL GERMAN POPULATION 16+

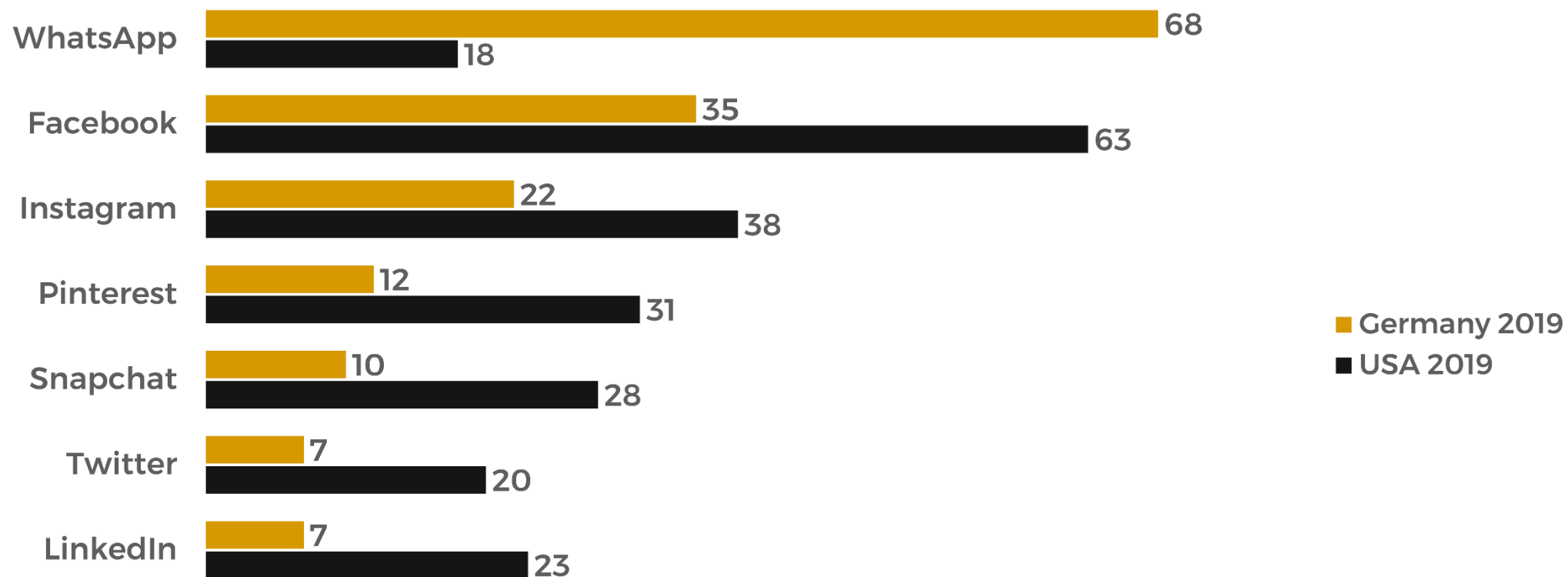
% CURRENTLY EVER USE SOCIAL MEDIA BRAND



Social Media Brand Usage

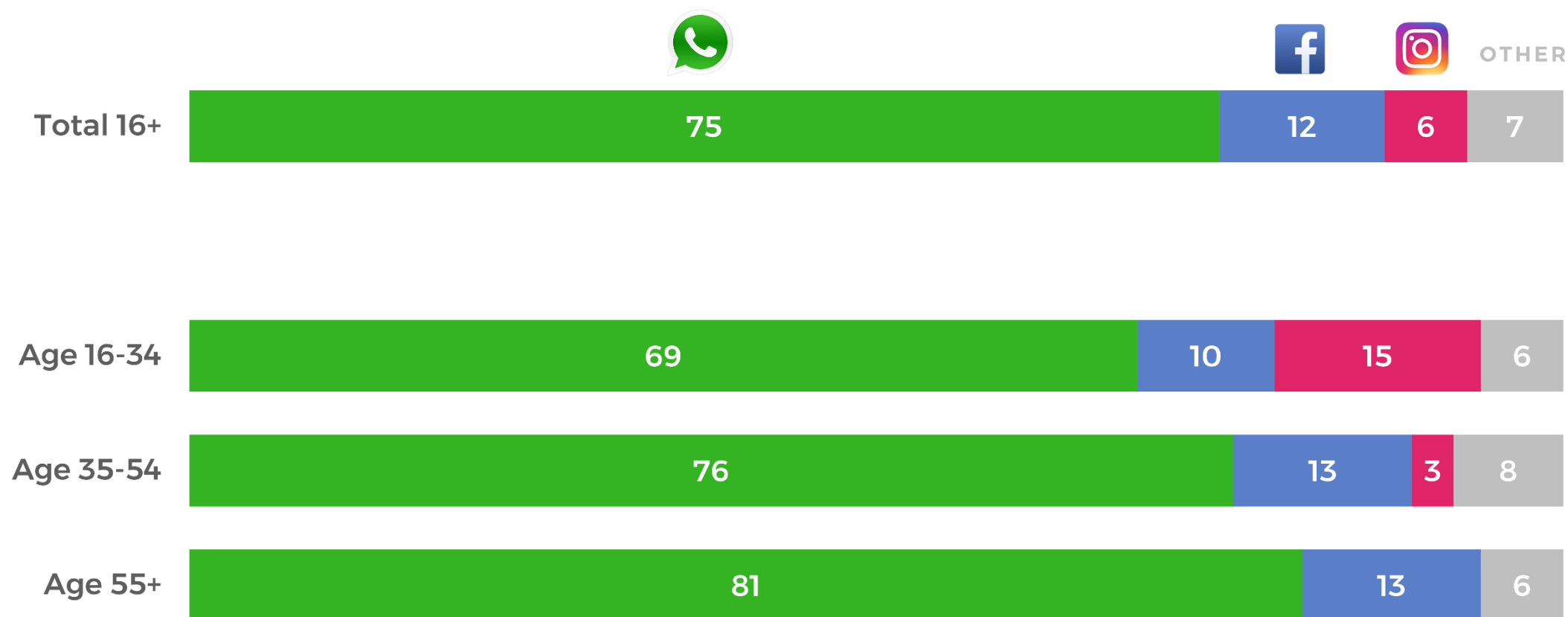
TOTAL POPULATION 16+

% CURRENTLY EVER USE SOCIAL MEDIA BRAND



Social Media Brand Used Most Often in Germany

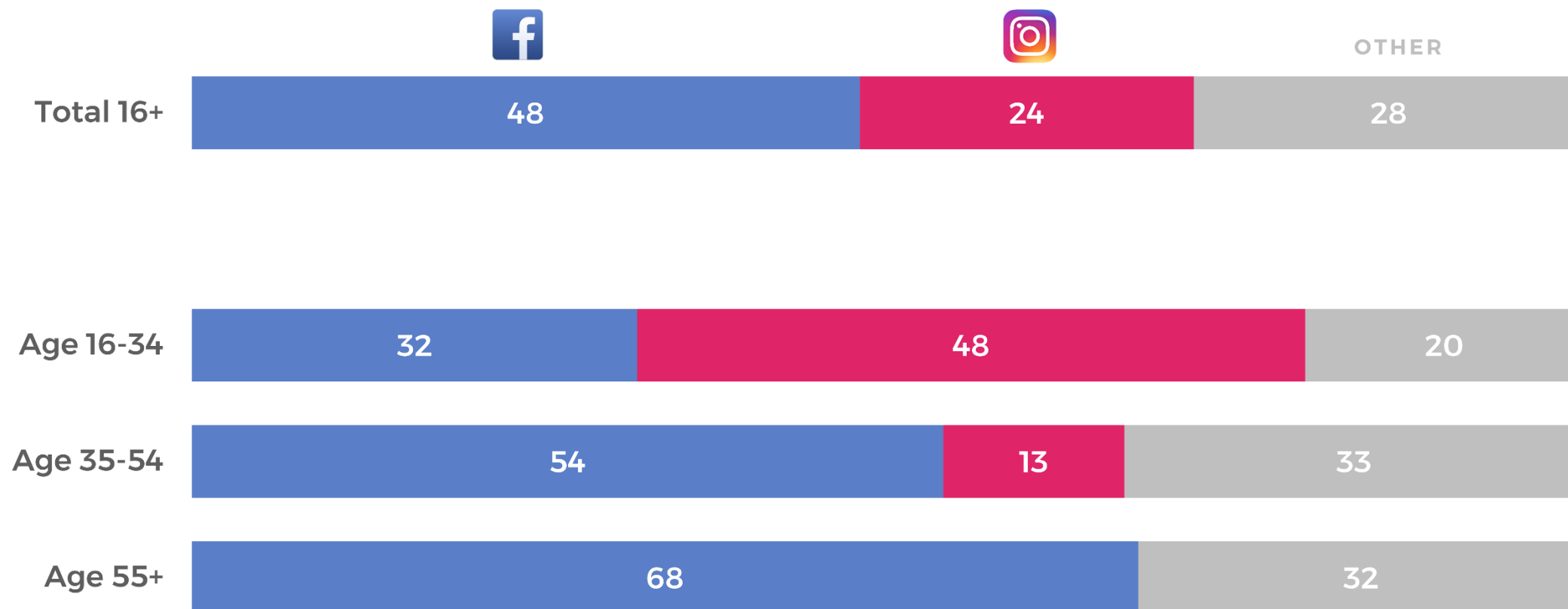
BASE: AGE 16+ AND USE SOCIAL MEDIA



Social Media Brand Used Most Often in Germany

EXCLUDING WHATSAPP

BASE: AGE 16+ AND USE SOCIAL MEDIA



Observations

- Radio usage continues at a high level in Germany, in cars and in general

Observations

- The audio space is extremely dynamic with many new forms of audio being used on many devices

Observations

- The German digital audio market lags about four years behind the USA on most measures

Observations

- More than one-third of 16-34 year olds in Germany are now listening to podcasts every month
- The podcast audience is young, well-educated, and has a higher than average income

Observations

- With digital audio likely to follow a similar path in Germany as has been seen in the USA, there are many opportunities for players in the space to guide that transition

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