

 THE INFINITE DIAL® 2020

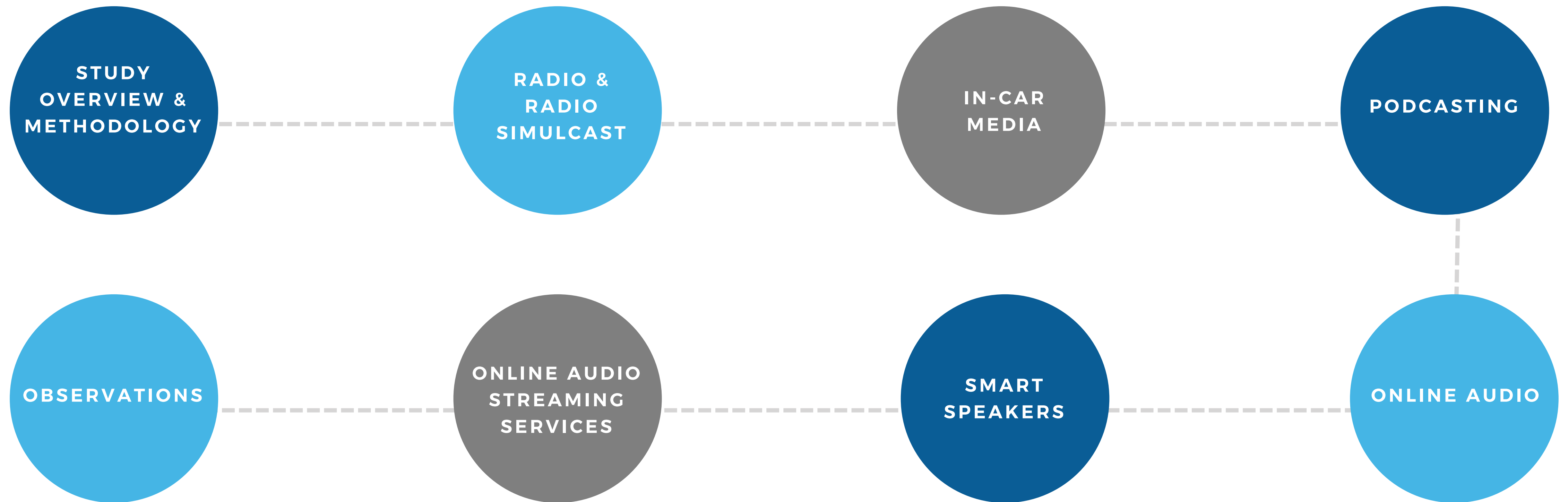
The Infinite Dial 2020 Australia

#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 fourth 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 2020, prior to the COVID-19 pandemic, Edison Research conducted a national telephone survey of 1,014 Australians age 12 and older
- ▶ Data weighted to national 12+ population figures



Radio & Radio Simulcast

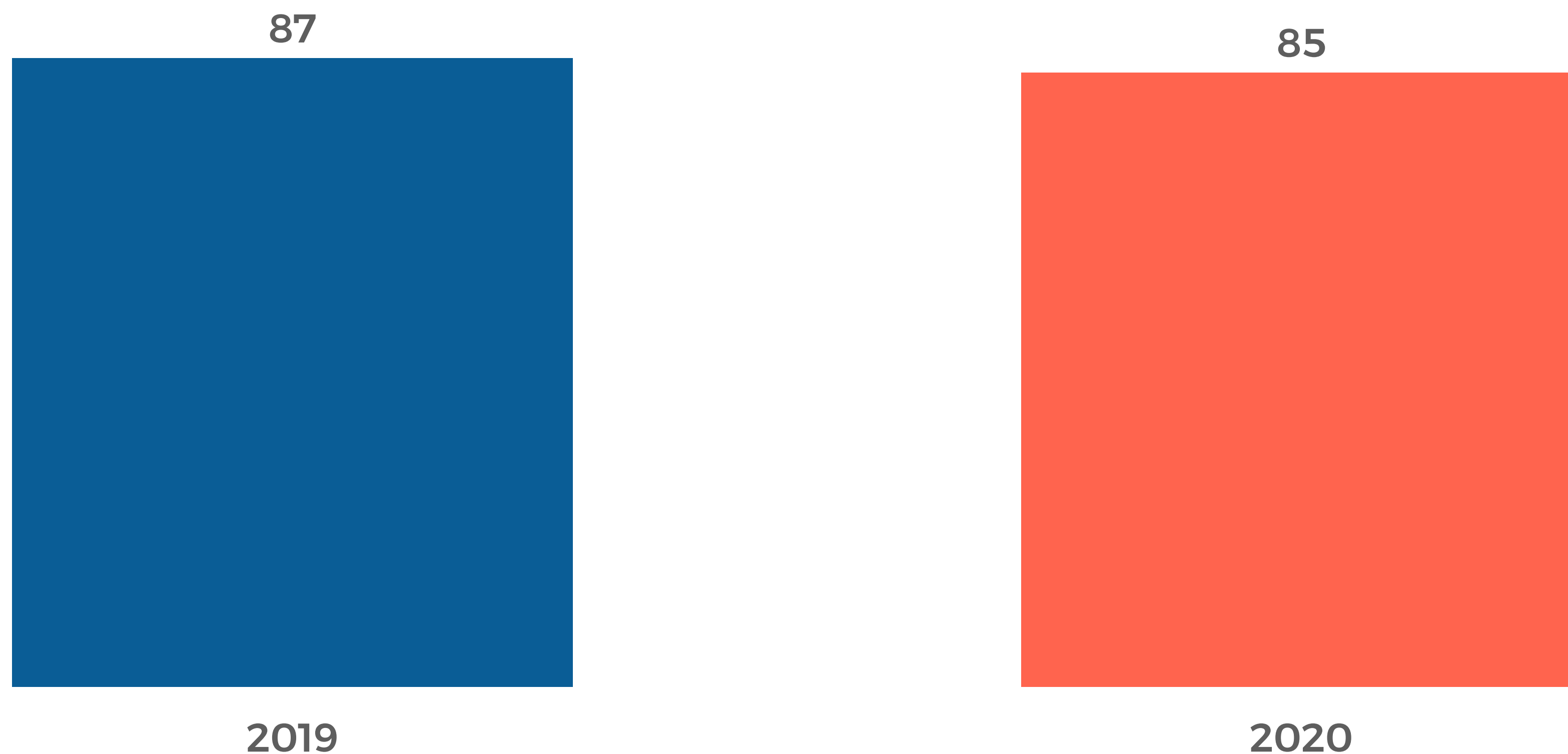


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Listening to Radio Content: Live Radio or Catch-up Podcasts in the Last Month

TOTAL AUSTRALIAN POPULATION 12+

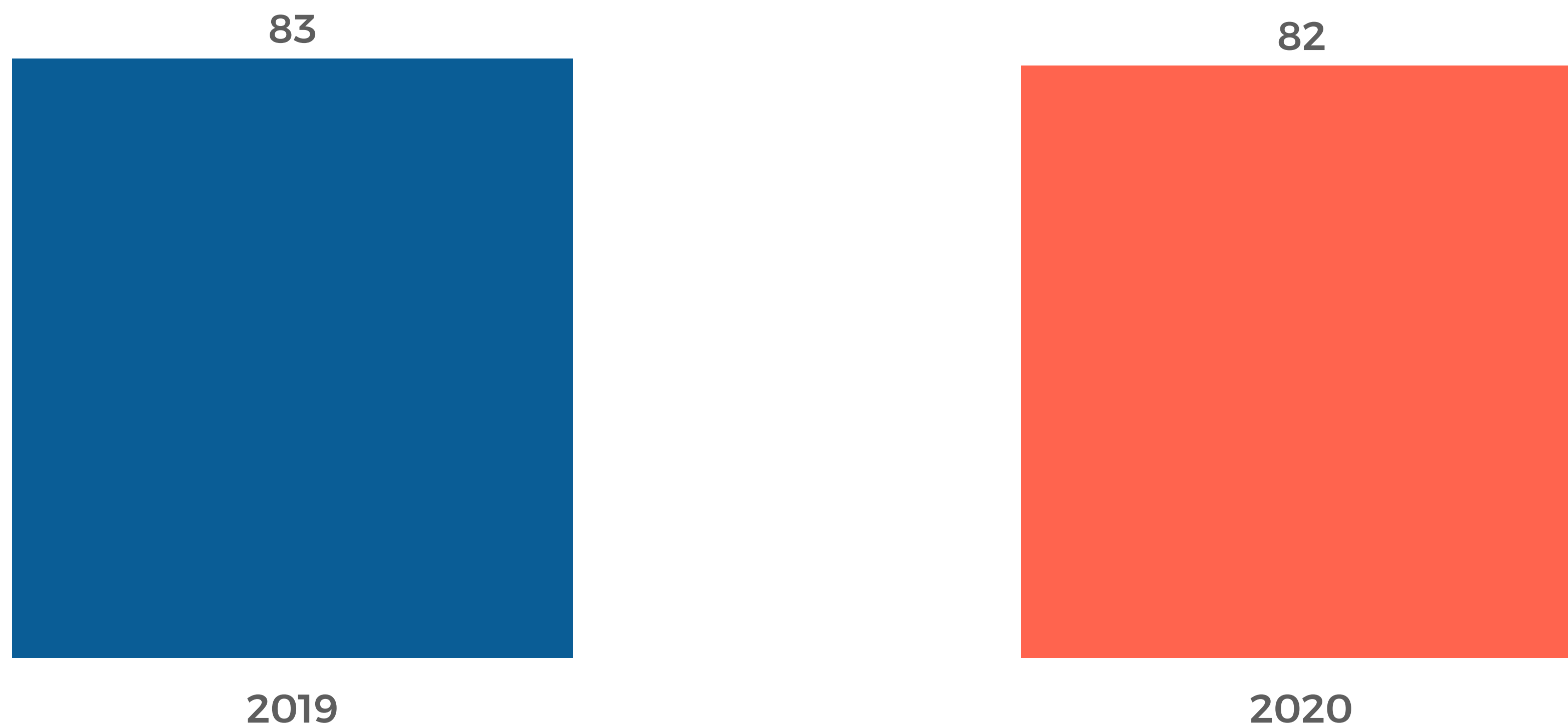
% LISTENED TO OVER-THE-AIR OR ONLINE AM/FM/DAB+ RADIO FOR AT LEAST 15 MINUTES IN LAST MONTH OR CATCH-UP PODCASTS AT LEAST ONCE A MONTH



Listening to Radio Content: Live Radio or Catch-up Podcasts in the Last Week

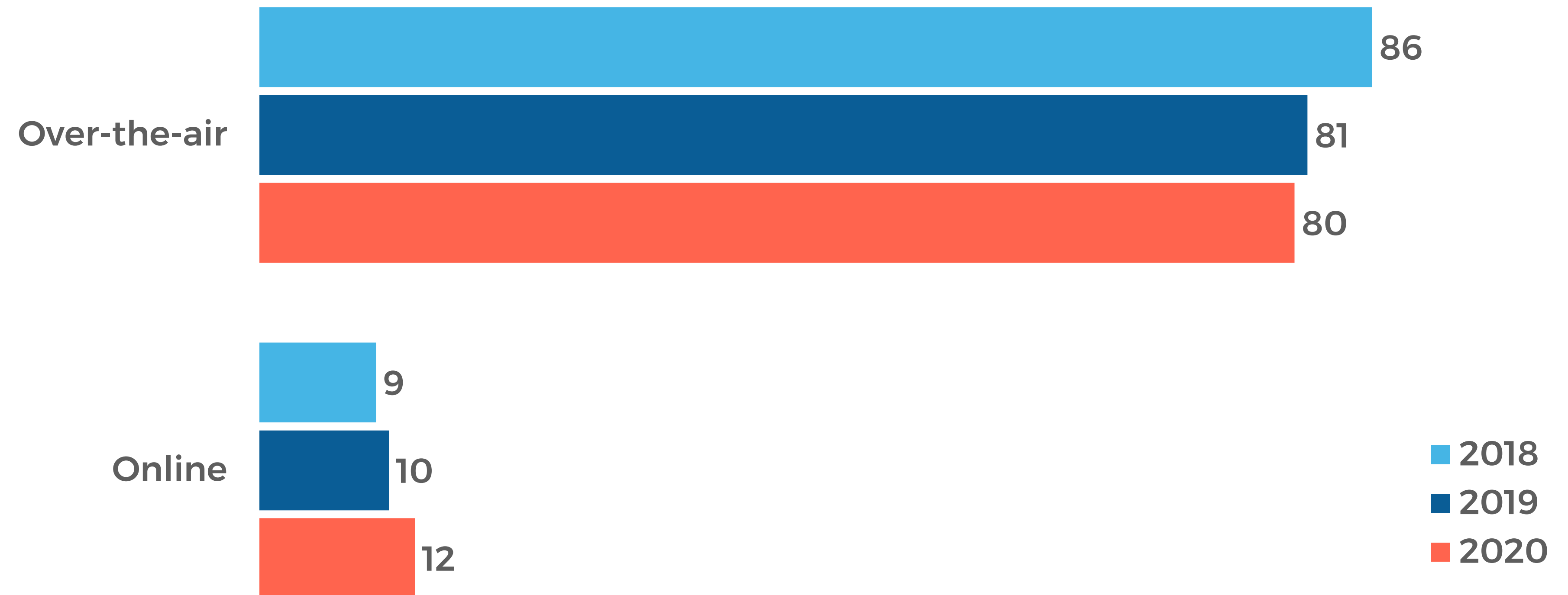
TOTAL AUSTRALIAN POPULATION 12+

% 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



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

TOTAL AUSTRALIAN POPULATION 12+

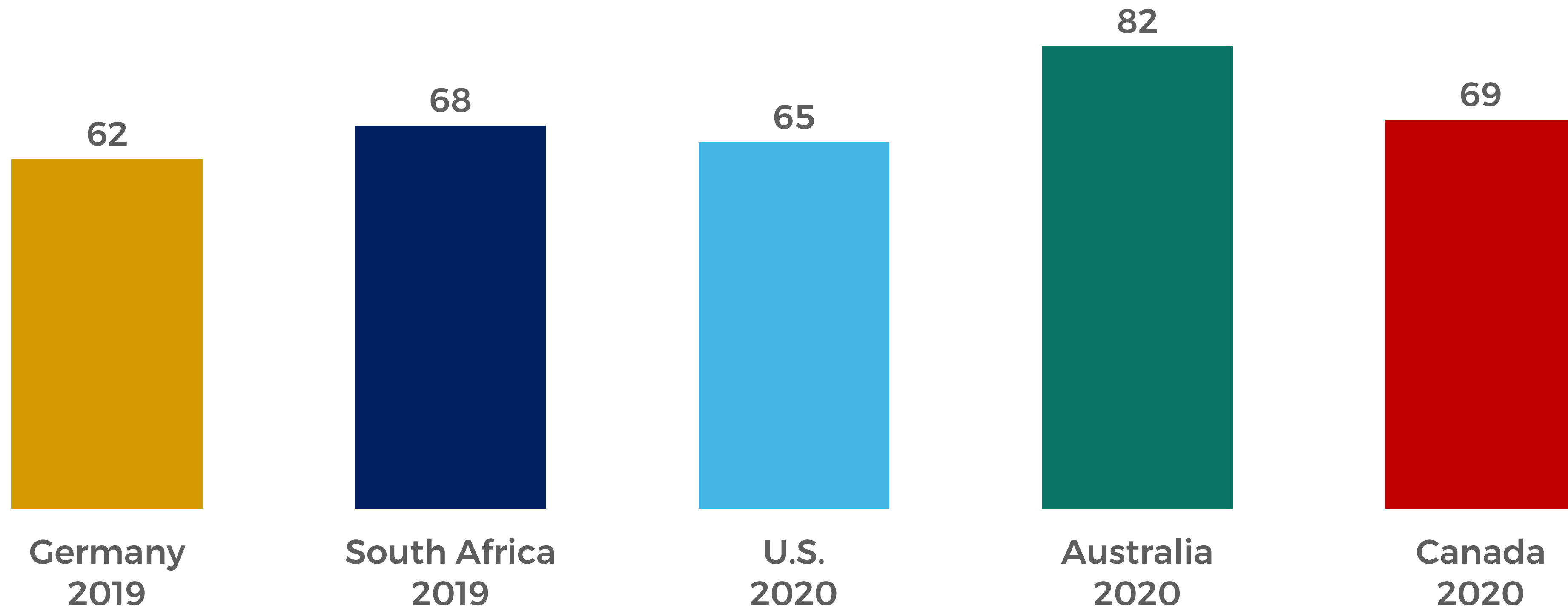


Listening to AM/FM Radio in the Last Week

GERMANY, SOUTH AFRICA MAJOR METRO COMMERCIAL, U.S., AUSTRALIA, AND CANADA POPULATIONS AGE 18+

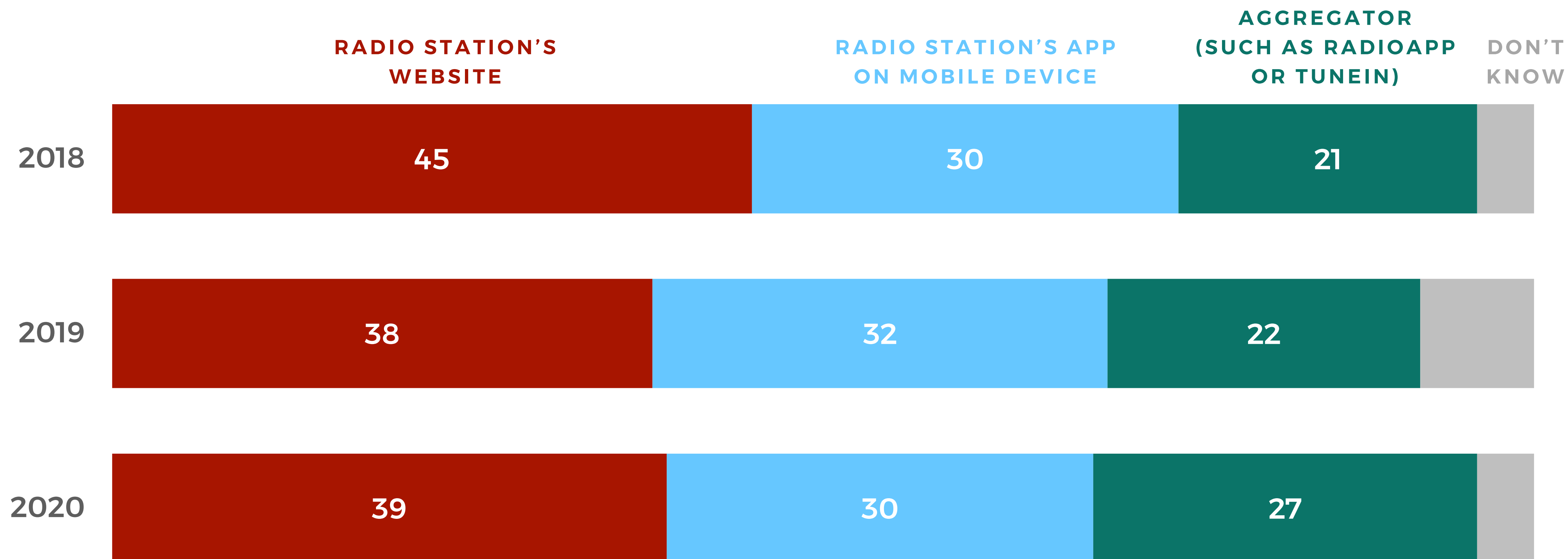
% LISTENING TO AM/FM RADIO IN LAST WEEK

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



Source Used Most Often to Listen to Online AM/FM/DAB+ Radio

BASE: AUSTRALIAN POPULATION 12+ WHO LISTENED TO ONLINE AM/FM/DAB+ RADIO IN LAST MONTH



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In-Car Media

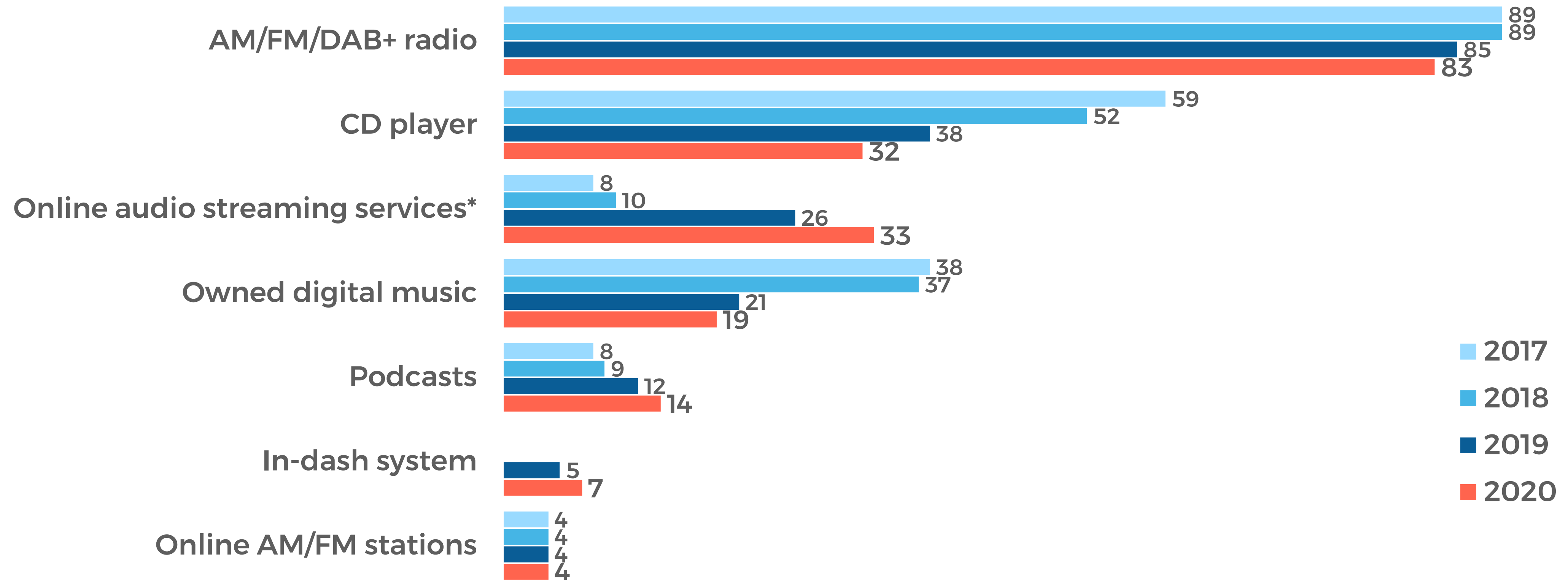


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Audio Sources Used in Car

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

% USING AUDIO SOURCE IN CAR



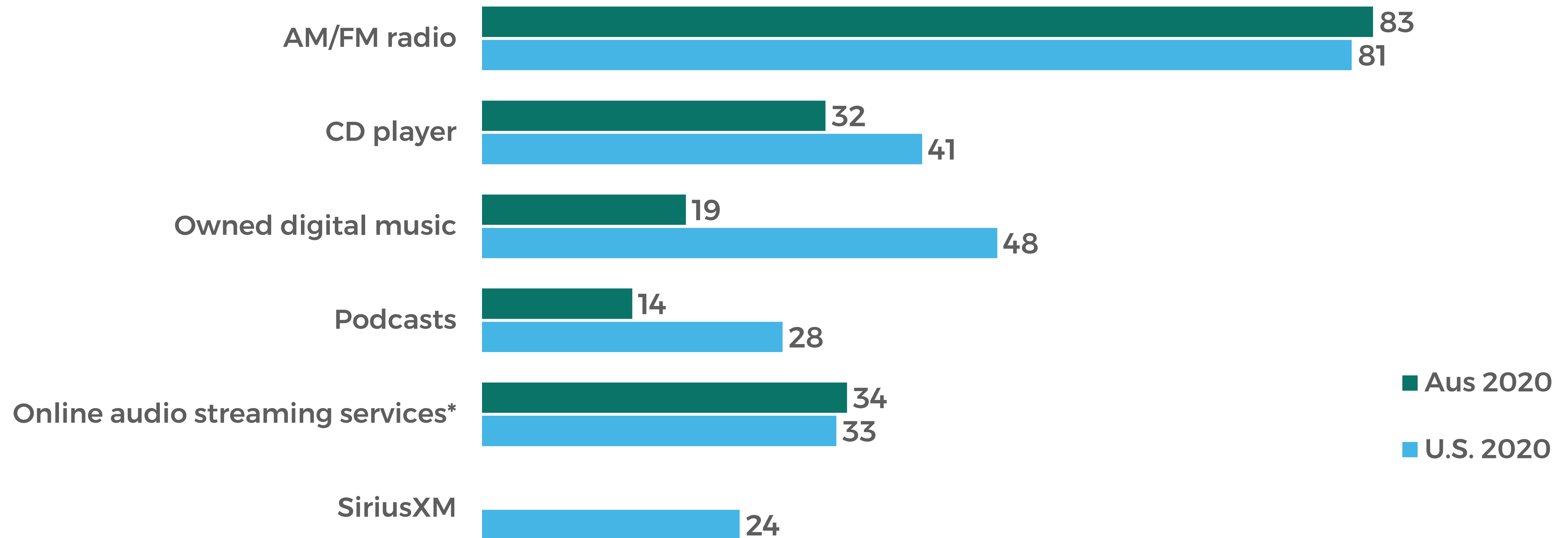
2017
2018
2019
2020

*SUCH AS SPOTIFY, YOUTUBE, OR APPLE MUSIC

Audio Sources Used in Car

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

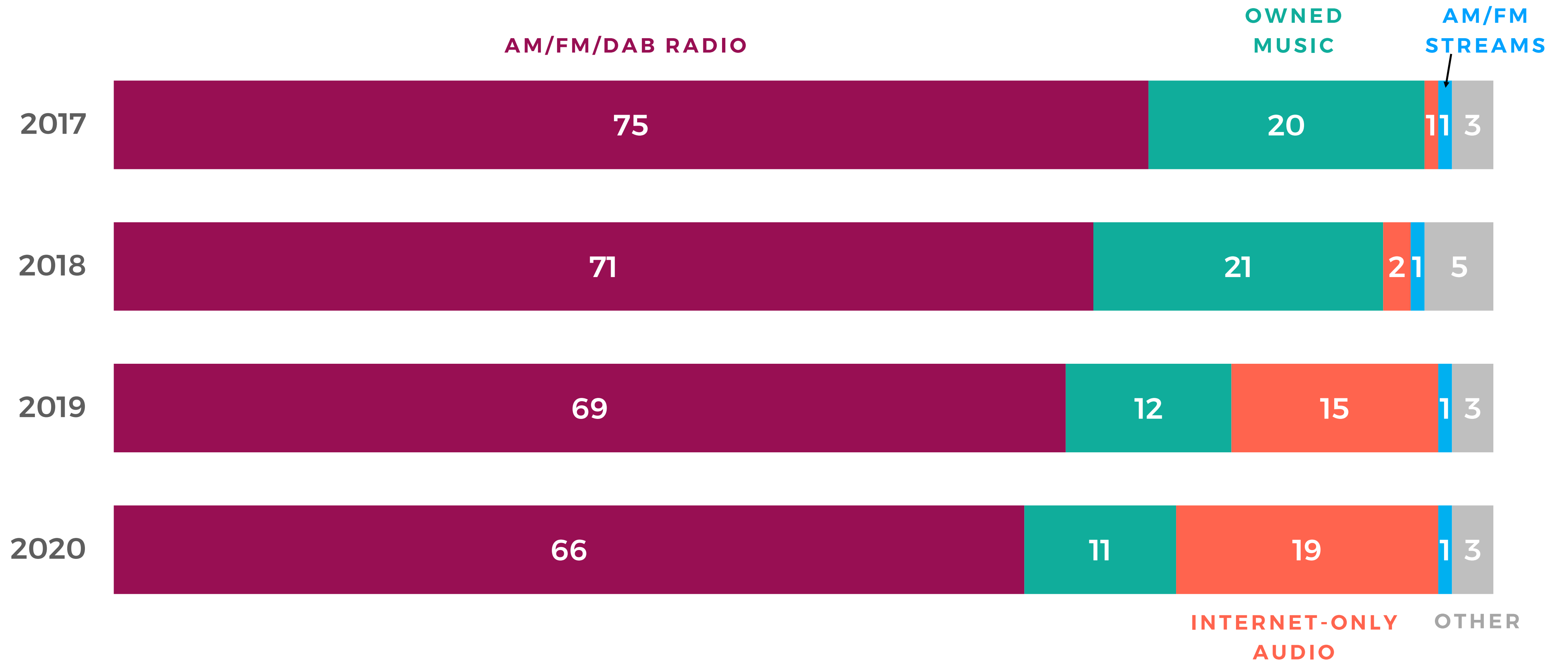
% USING AUDIO SOURCE IN CAR



*SUCH AS SPOTIFY, YOUTUBE, OR APPLE MUSIC

Audio Source Used Most Often in Car

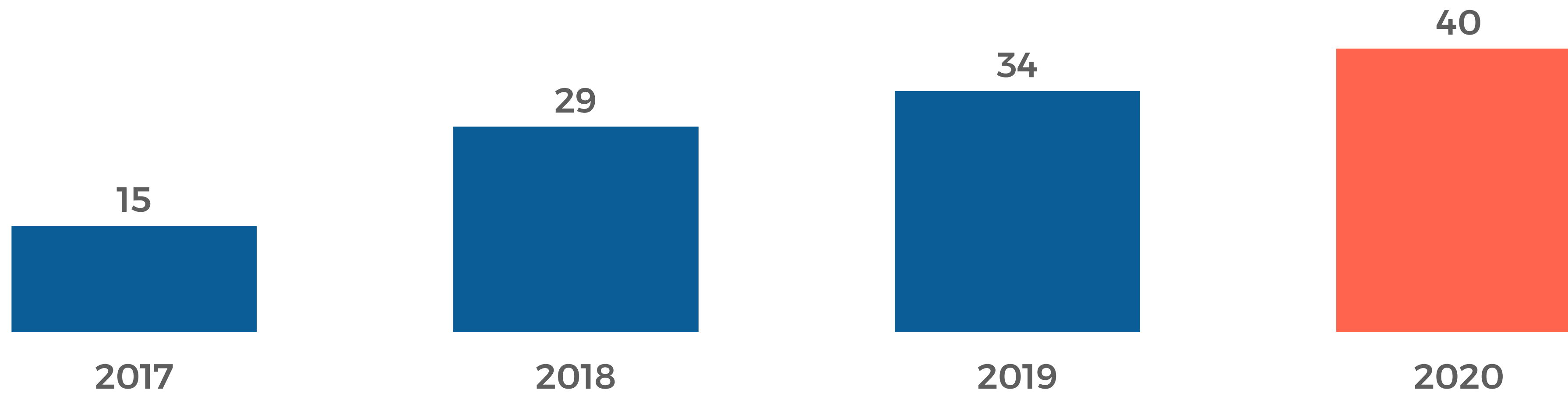
BASE: AUSTRALIAN 18+, HAVE DRIVEN/RIDDEN IN CAR IN LAST MONTH, AND USE ANY AUDIO SOURCE IN CAR



Online Audio Listening in Car Through a Cell Phone

TOTAL AUSTRALIAN POPULATION 12+

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



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Podcasting

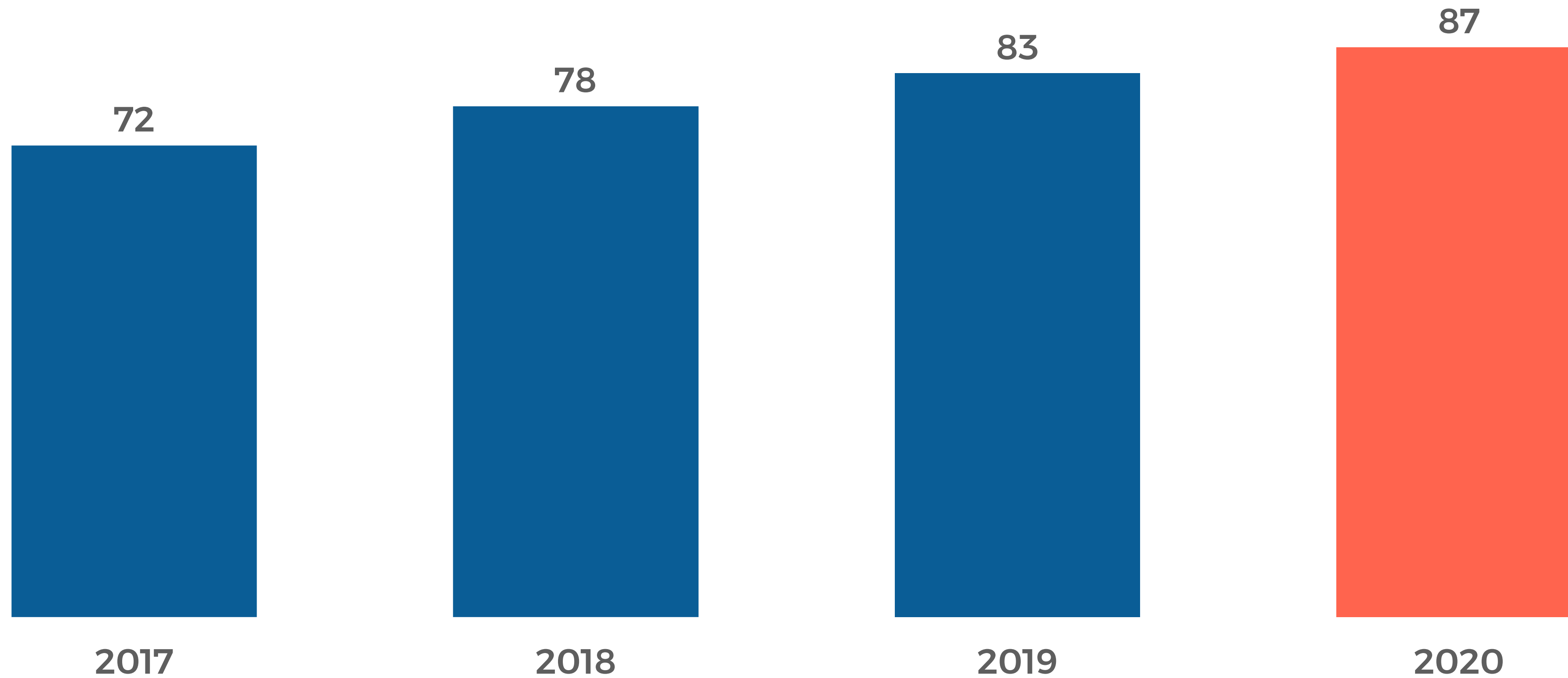


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Podcasting Awareness

TOTAL AUSTRALIAN POPULATION 12+

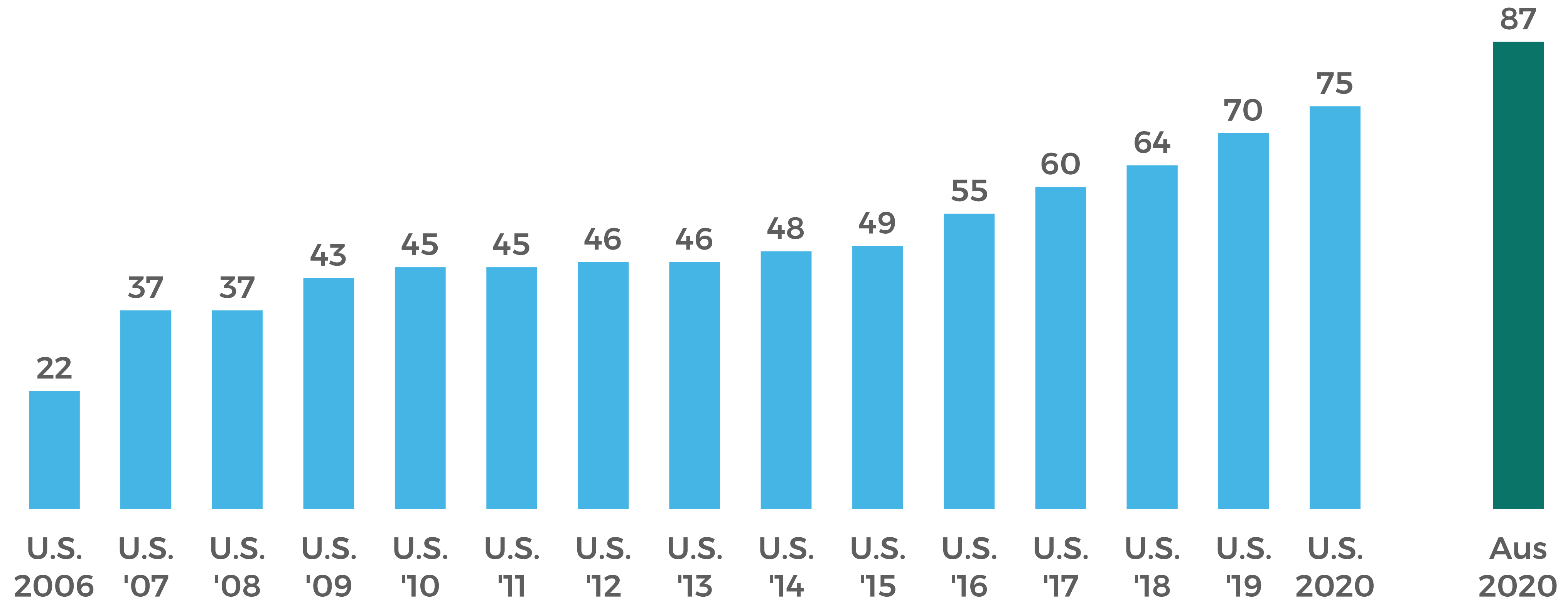
% AWARE OF THE TERM "PODCASTING"



Podcasting Awareness

POPULATIONS 12+

% AWARE OF THE TERM "PODCASTING"



Monthly Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+

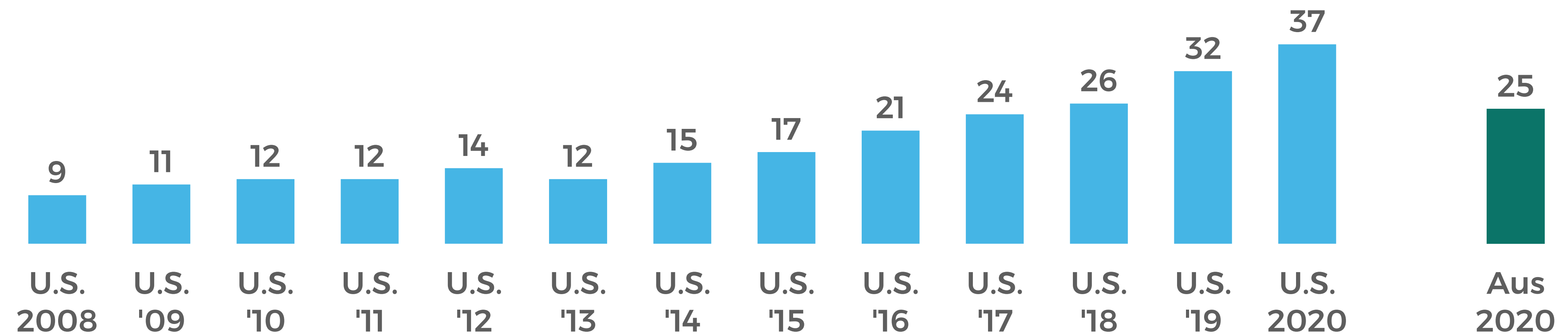
% LISTENED TO A PODCAST IN LAST MONTH



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+

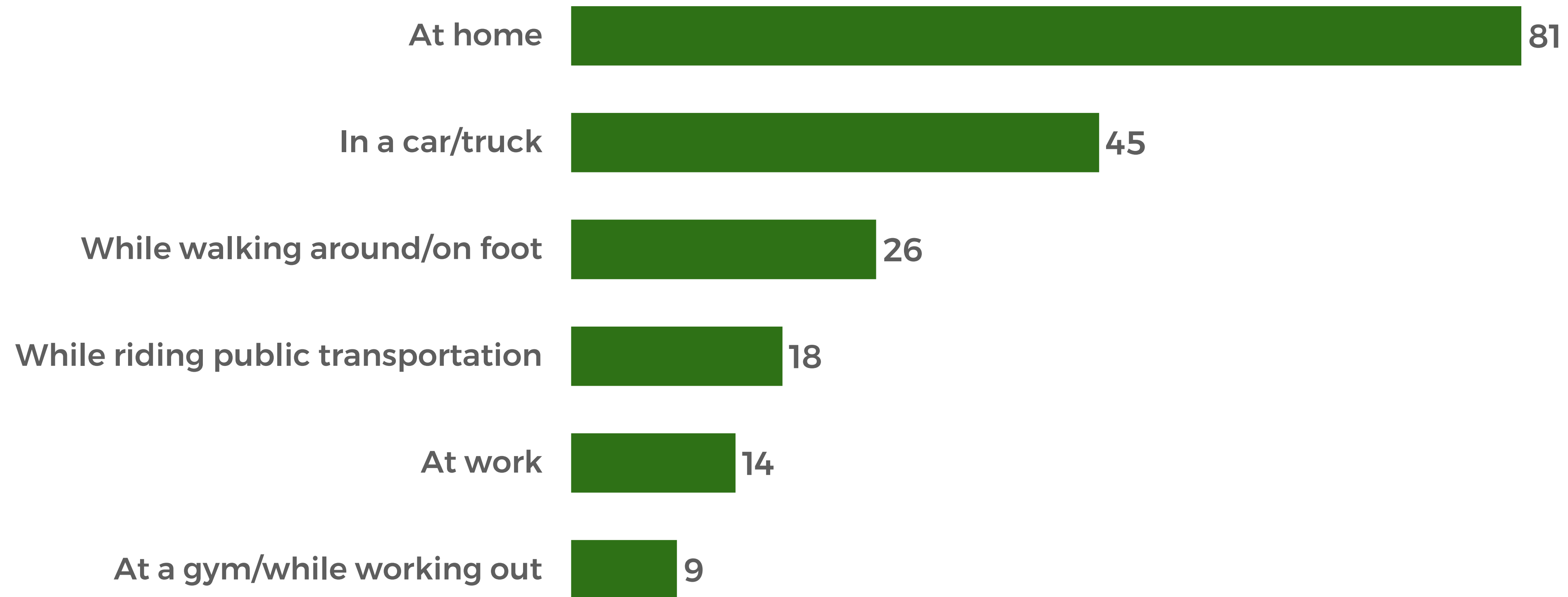
% LISTENED TO A PODCAST IN LAST WEEK



Podcast Listening Locations

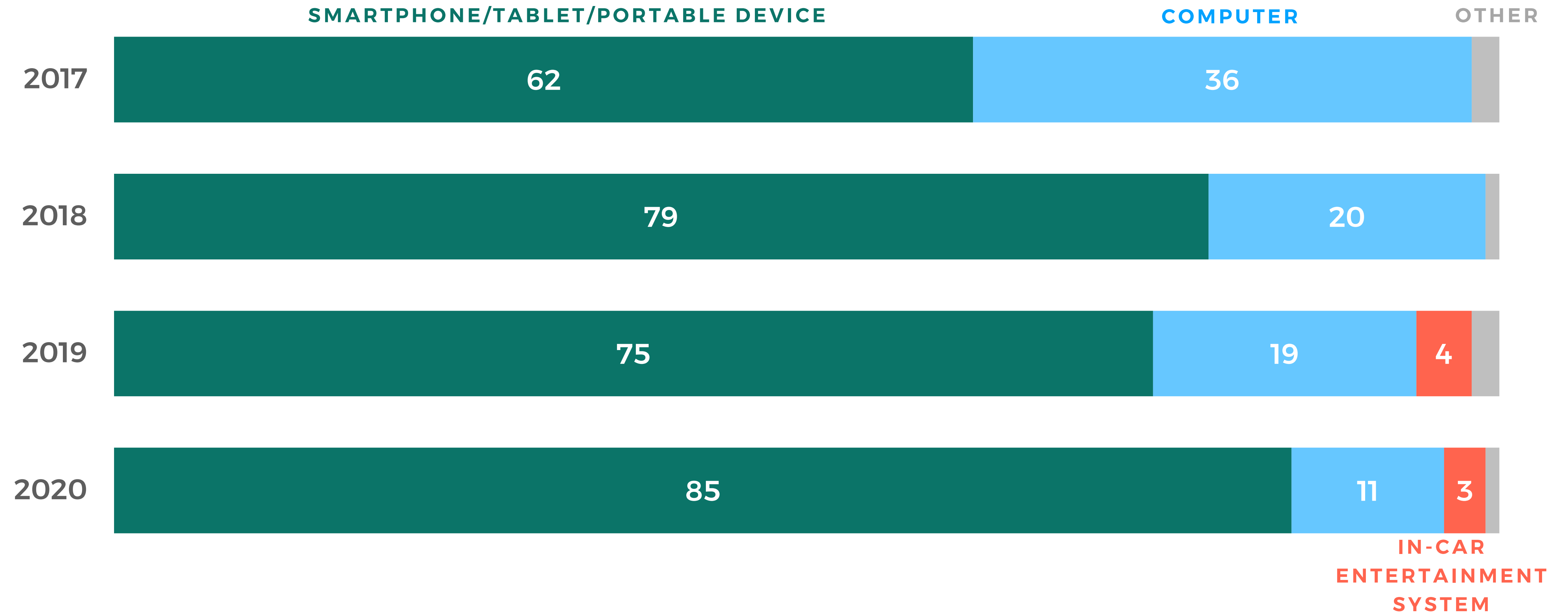
BASE: AUSTRALIAN 12+ AND EVER LISTENED TO A PODCAST; 32%

% LISTENED TO A PODCAST IN LOCATION



Device Used Most Often to Listen to Podcasts

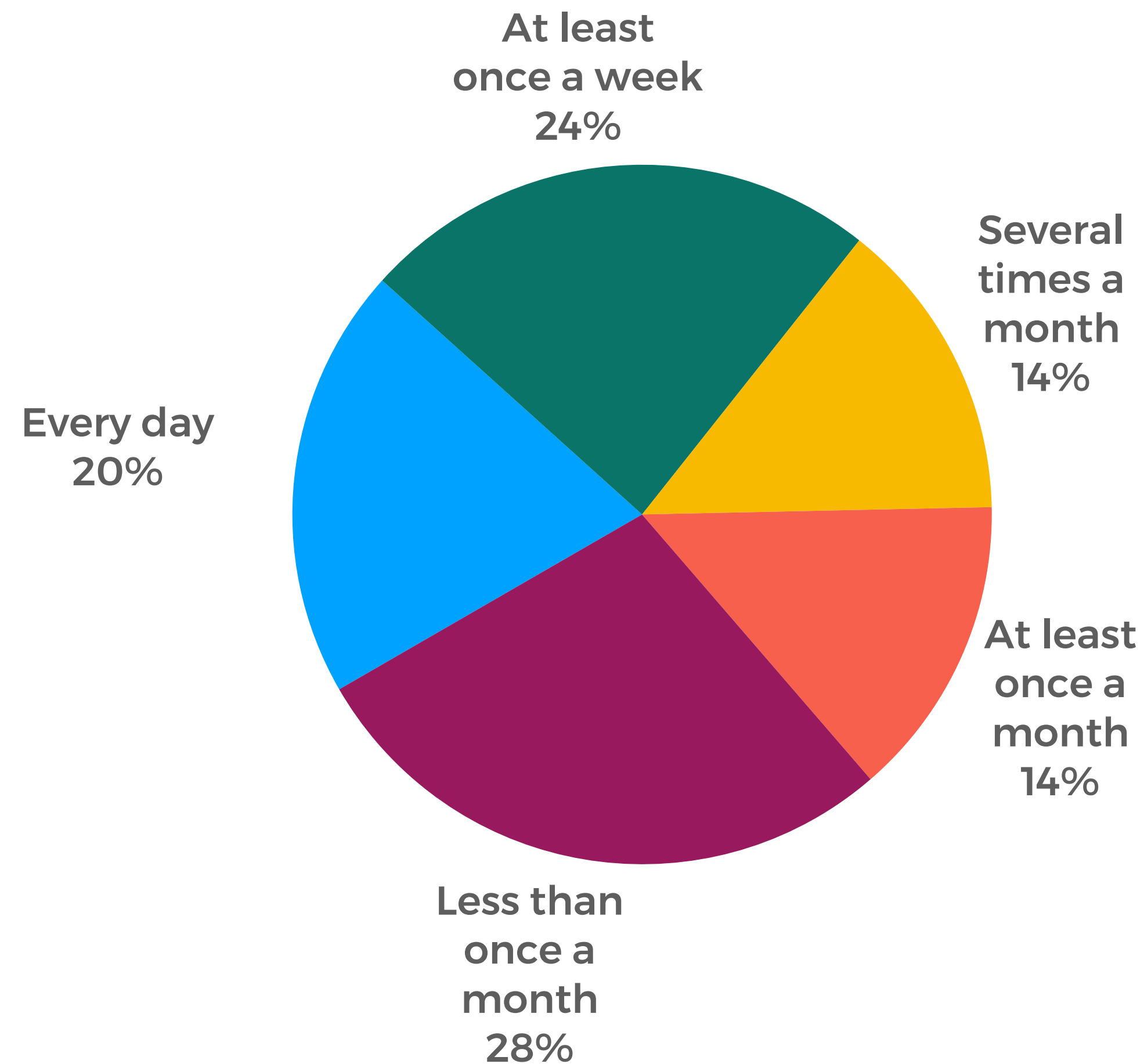
BASE: AUSTRALIAN 12+ AND EVER LISTENED TO A PODCAST; 32%



Frequency of Listening to Podcasts

BASE: AUSTRALIAN 12+ AND EVER LISTENED TO A PODCAST; 32%

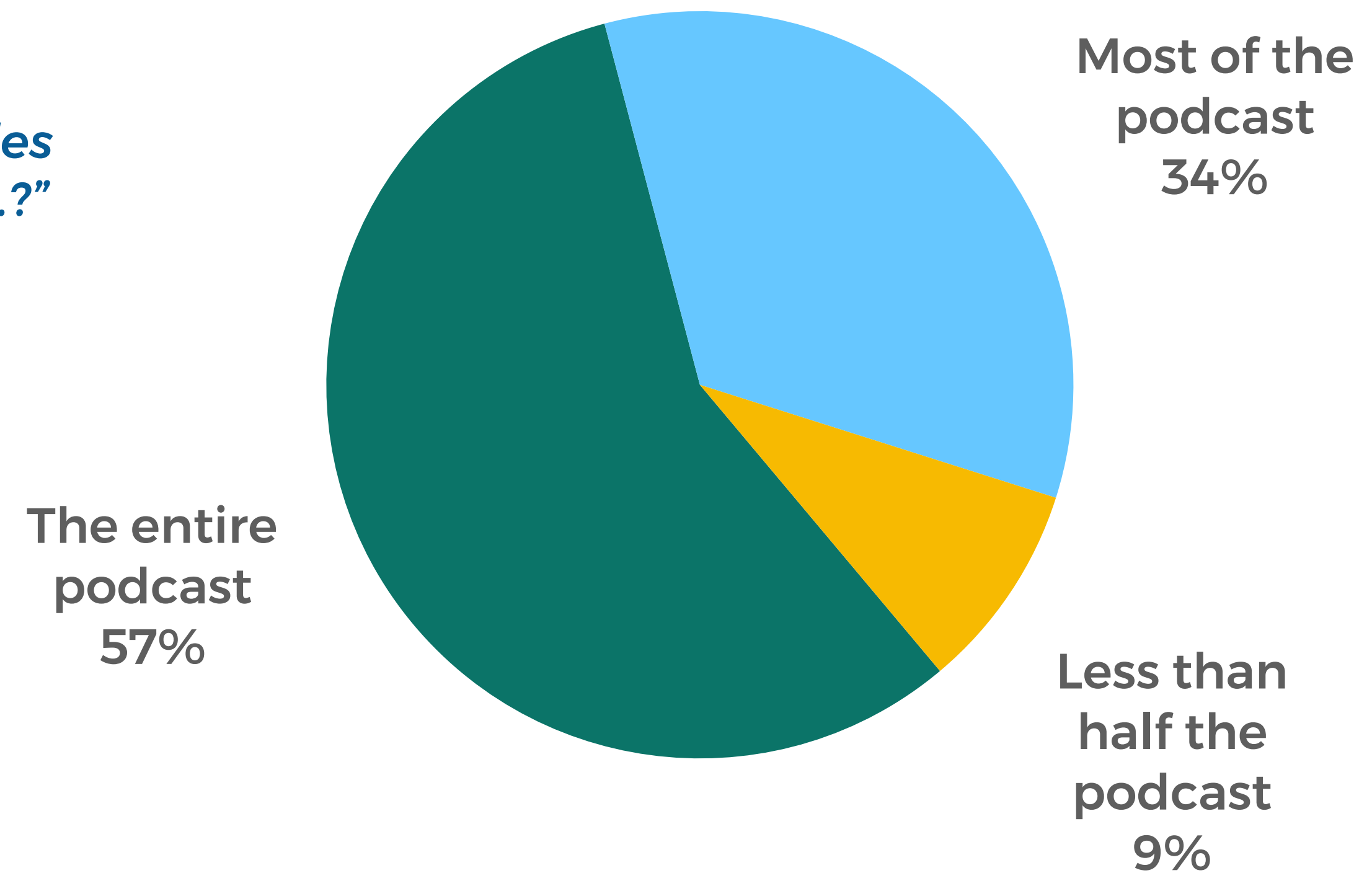
“How often would you say you listen to podcasts?”



Amount of Podcast Episode Listened to

BASE: AUSTRALIAN 12+ AND EVER LISTENED TO A PODCAST; 32%

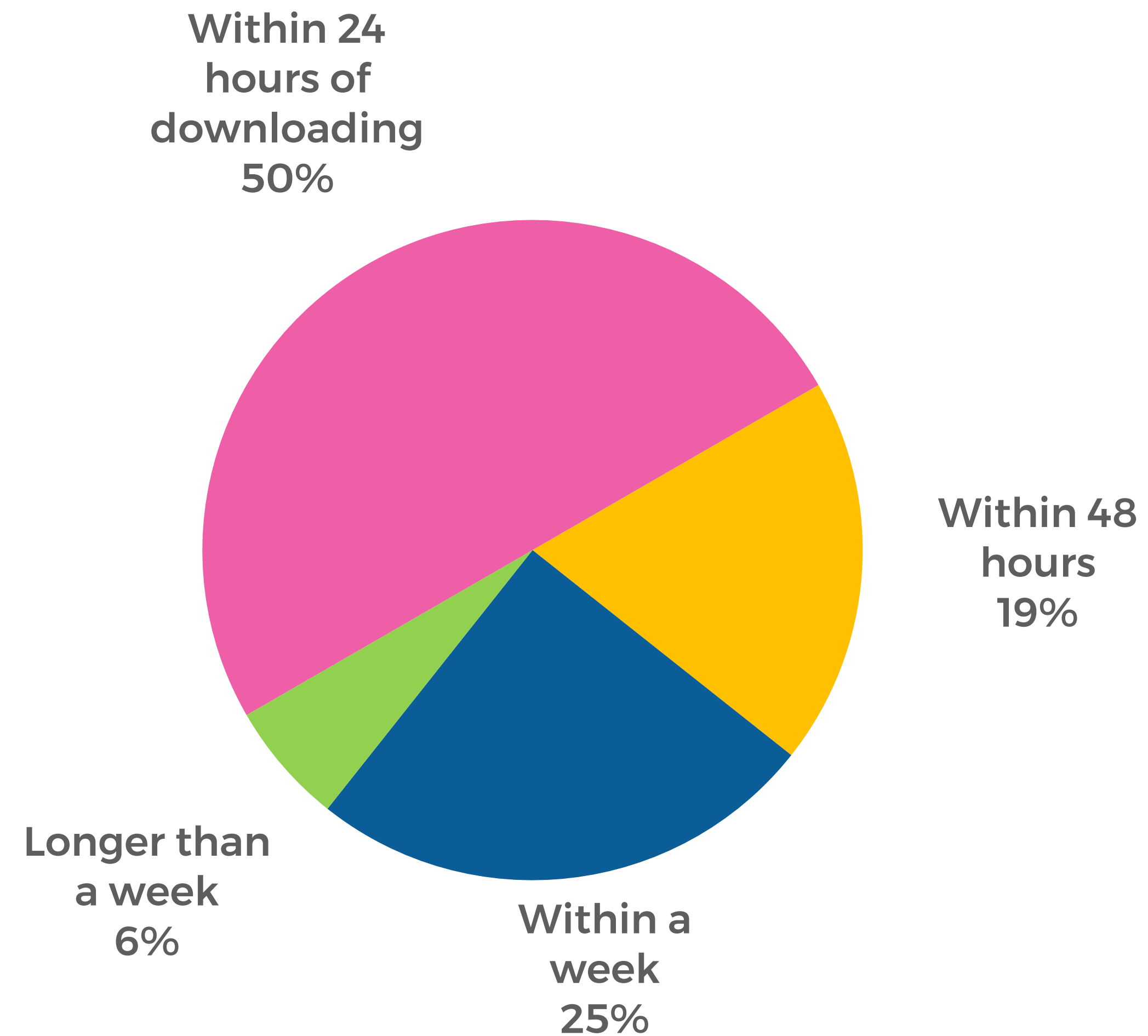
“Think about the audio podcast episodes you listen to. Do you typically listen to...?”



Podcasts Downloaded and Listened to Later

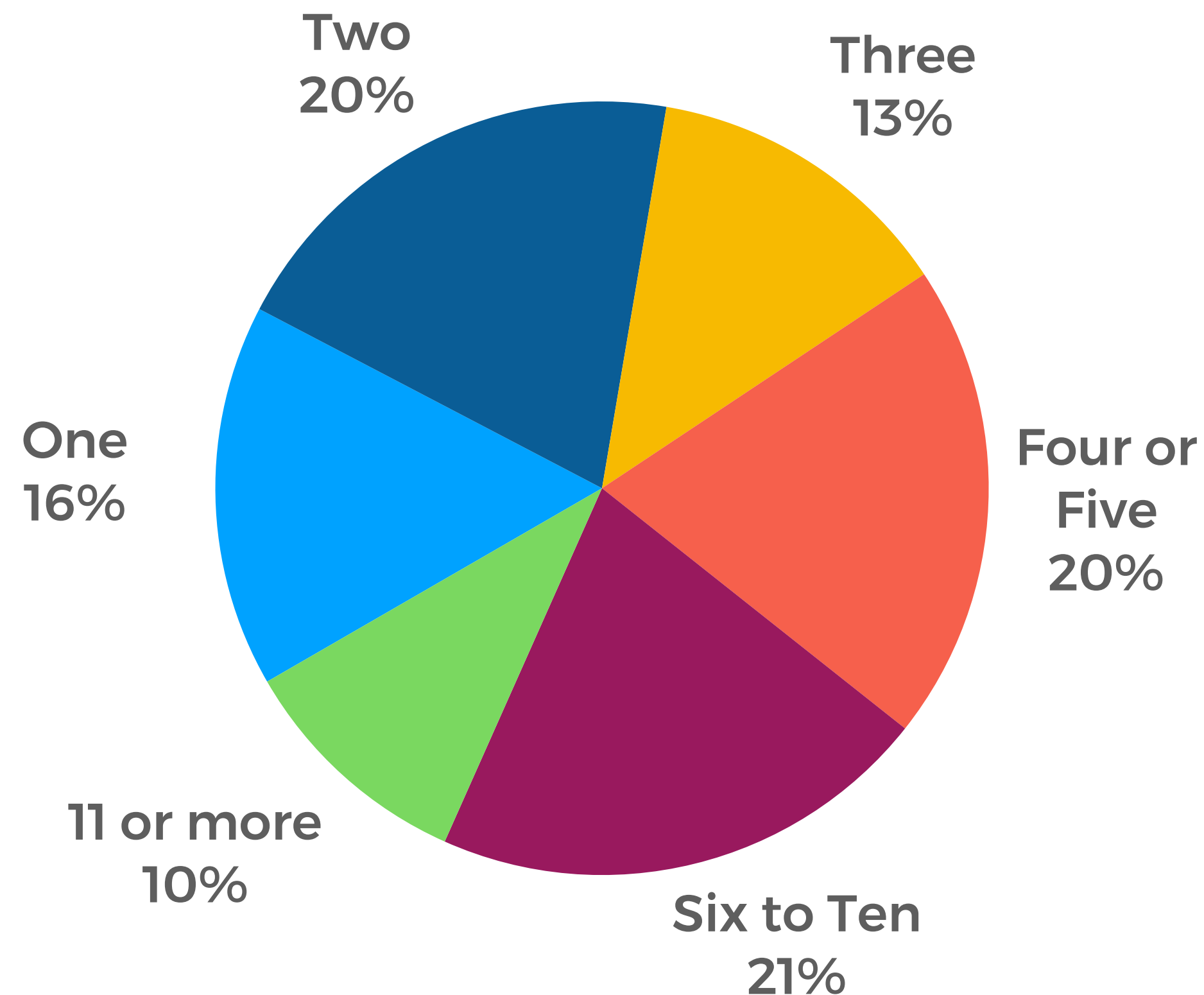
BASE: AUSTRALIAN 12+ AND EVER DOWNLOAD PODCASTS TO LISTEN LATER; 16%

“When did you listen to the last podcast you downloaded and listened to at a later time?”



Number of Podcasts Listened to in Last Week

BASE: AUSTRALIAN 12+ AND LISTENED TO PODCAST IN LAST WEEK; 17%



Australian weekly podcast listeners averaged
Six podcasts
in the last week



Online Audio



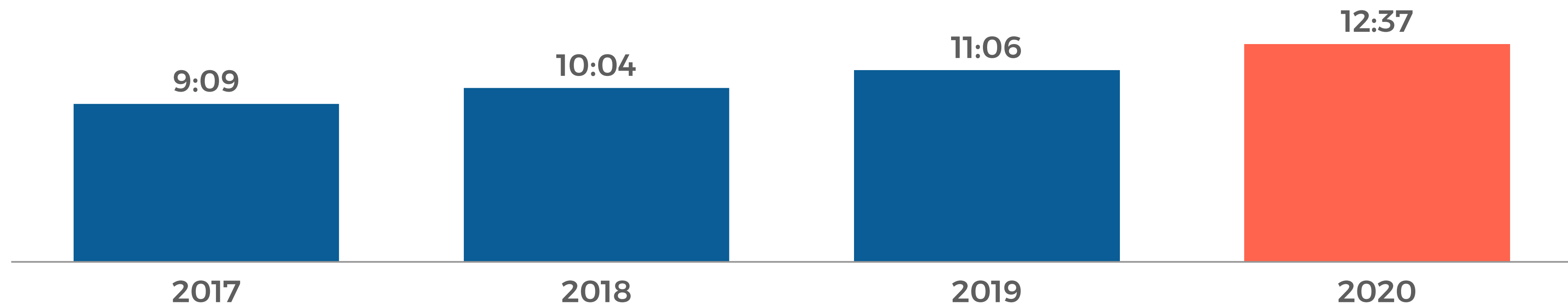
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Average Time Spent Listening to Online Audio

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 STREAMED AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET

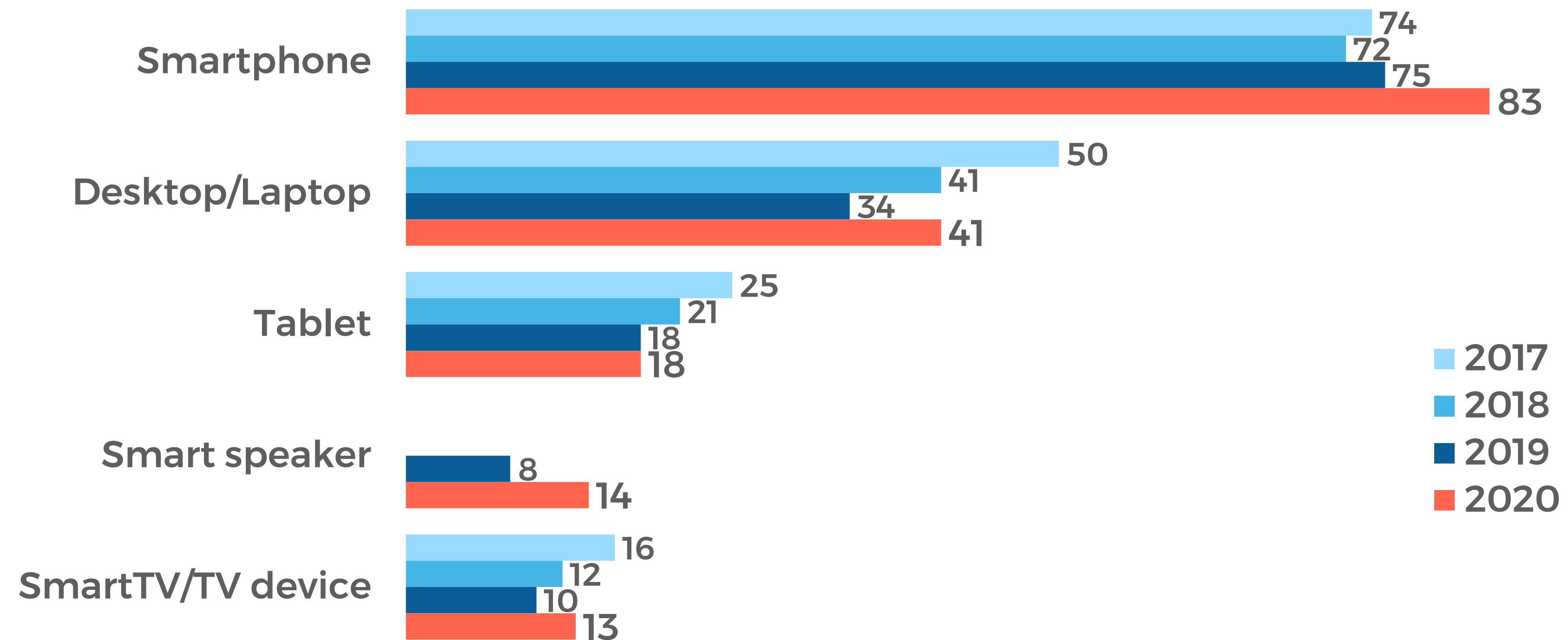


Devices Used to Listen to Online Audio

BASE: AUSTRALIAN 12+ WHO EVER LISTENED TO ONLINE AUDIO

% CURRENTLY EVER LISTEN TO ONLINE AUDIO THROUGH DEVICE

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





Smart Speakers

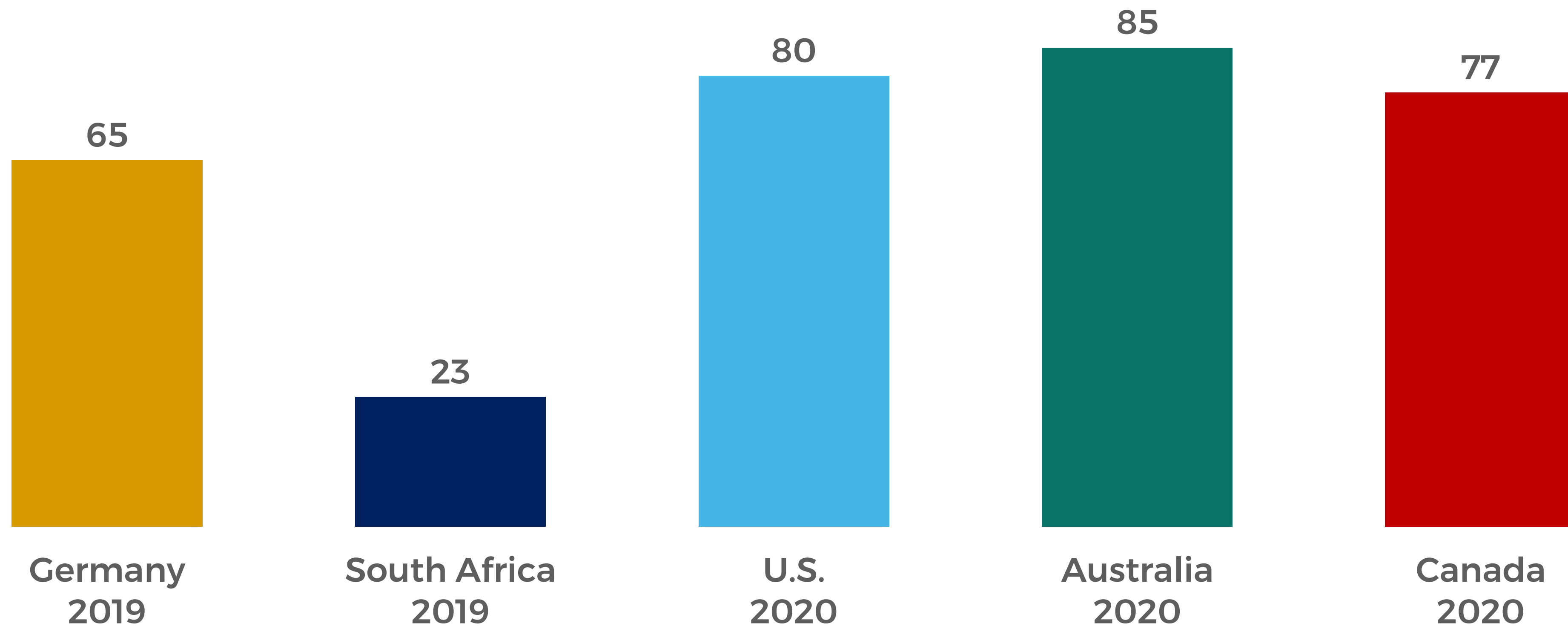


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Smart Speaker Awareness

GERMANY, SOUTH AFRICA MAJOR METRO COMMERCIAL, U.S., AUSTRALIA, AND CANADA POPULATIONS AGE 18+

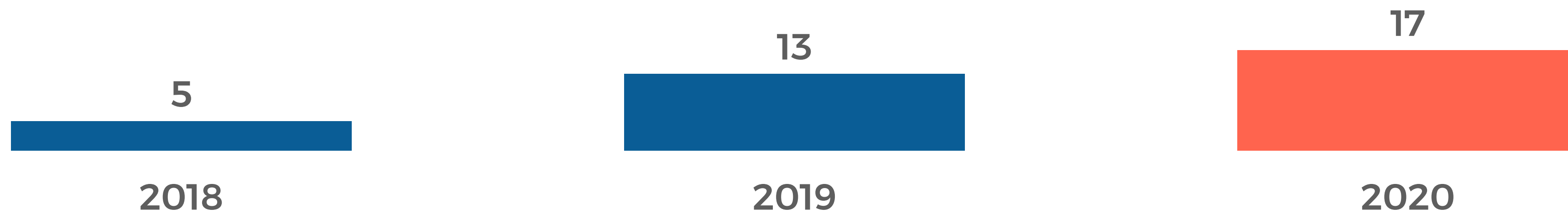
% AWARE OF ANY SMART SPEAKER BRAND



Smart Speaker Ownership

TOTAL AUSTRALIAN POPULATION 12+

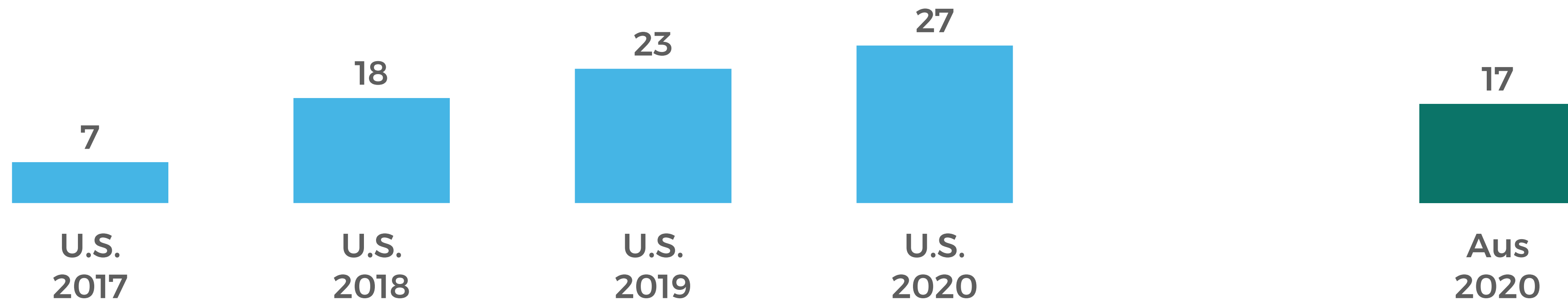
% OWNING A SMART SPEAKER BRAND



Smart Speaker Ownership

POPULATIONS 12+

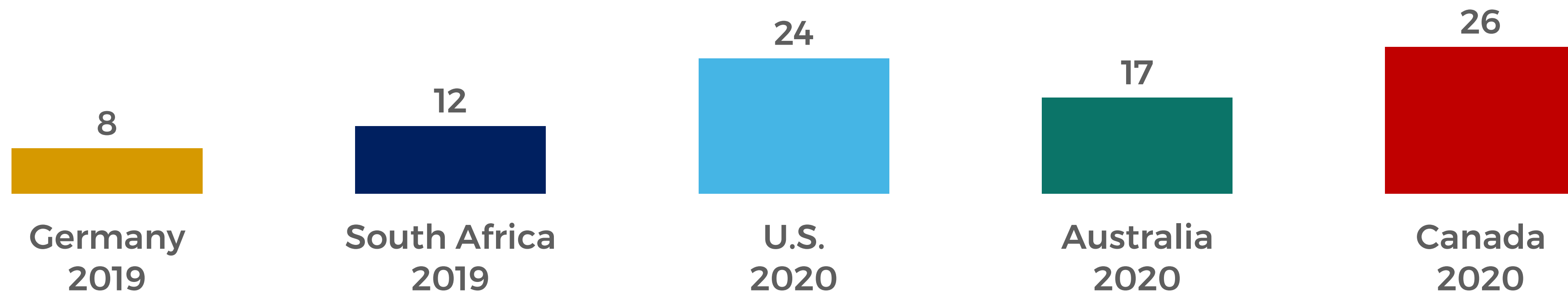
% OWNING A SMART SPEAKER



Smart Speaker Ownership

GERMANY, SOUTH AFRICA MAJOR METRO COMMERCIAL, U.S., AUSTRALIA, AND CANADA POPULATIONS AGE 18+

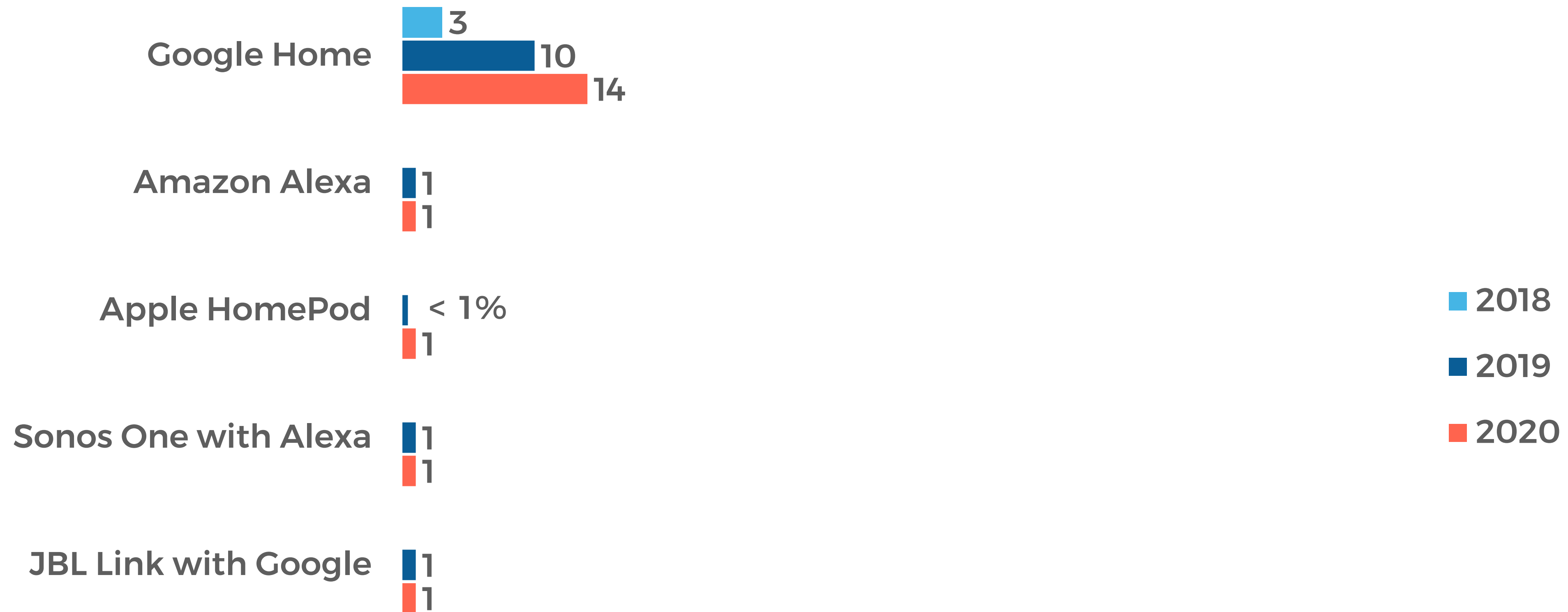
% OWN ANY SMART SPEAKER BRAND



Smart Speaker Ownership

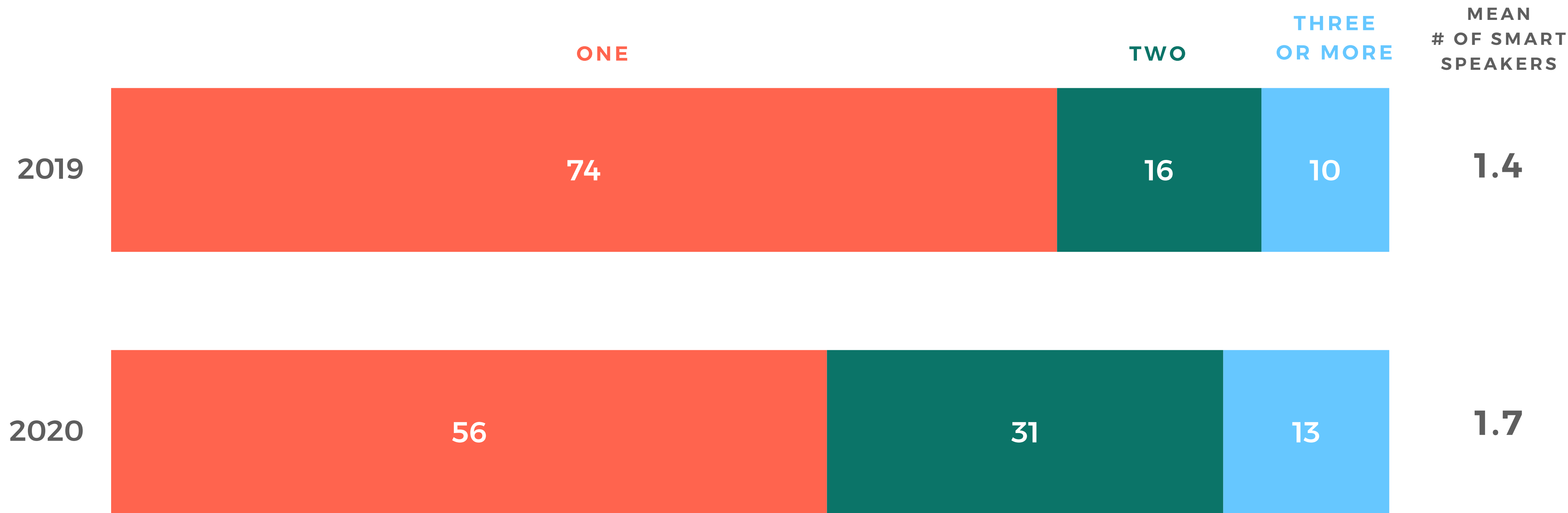
TOTAL AUSTRALIAN POPULATION 12+

% OWNING SMART SPEAKER BRAND



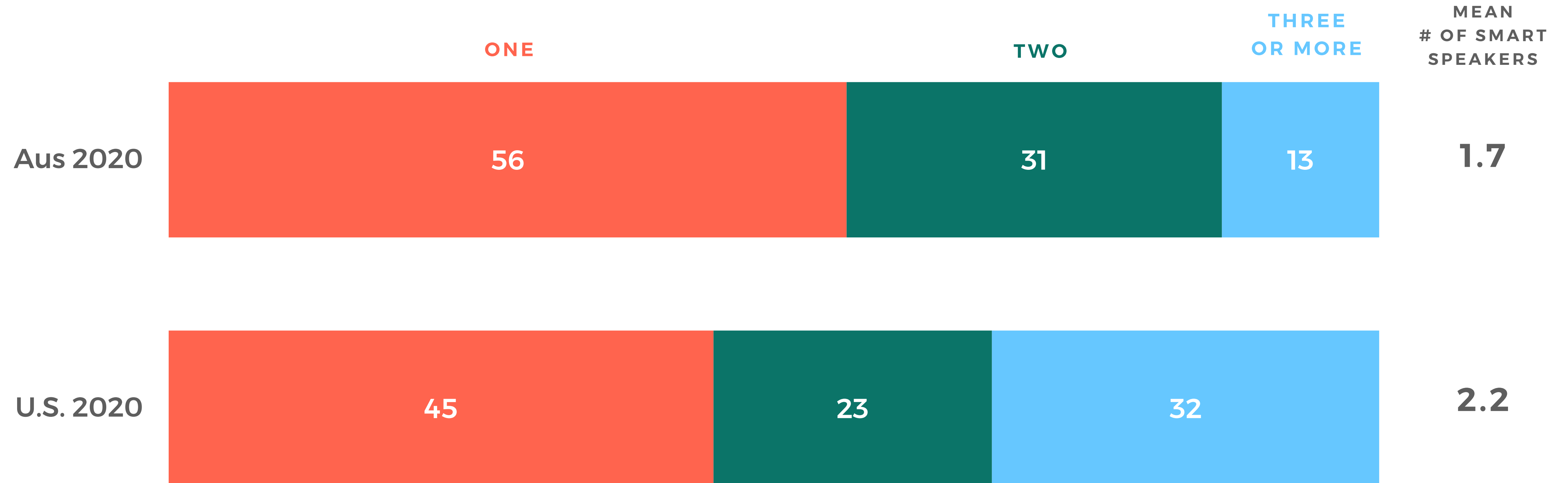
Number of Smart Speakers in Household

BASE: AUSTRALIAN AGE 12+ SMART SPEAKER OWNERS



Number of Smart Speakers in Household

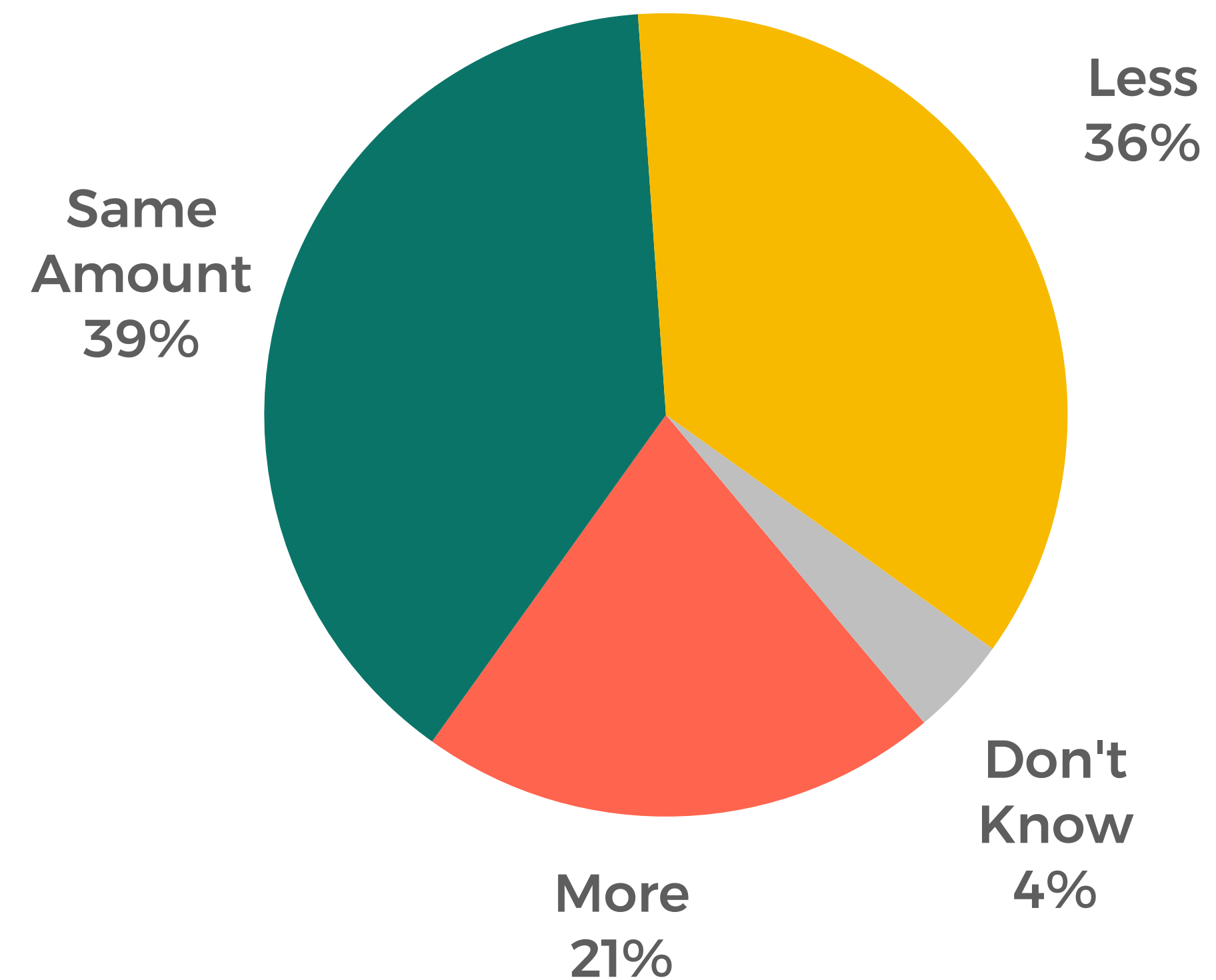
BASE: AGE 12+ SMART SPEAKER OWNERS



Usage of Smart Speaker Compared to First Month

BASE: AUSTRALIAN 12+ SMART SPEAKER OWNERS

“Compared to the first month you had your smart speaker, would you say you are now using your smart speaker more, less, or the same amount?”

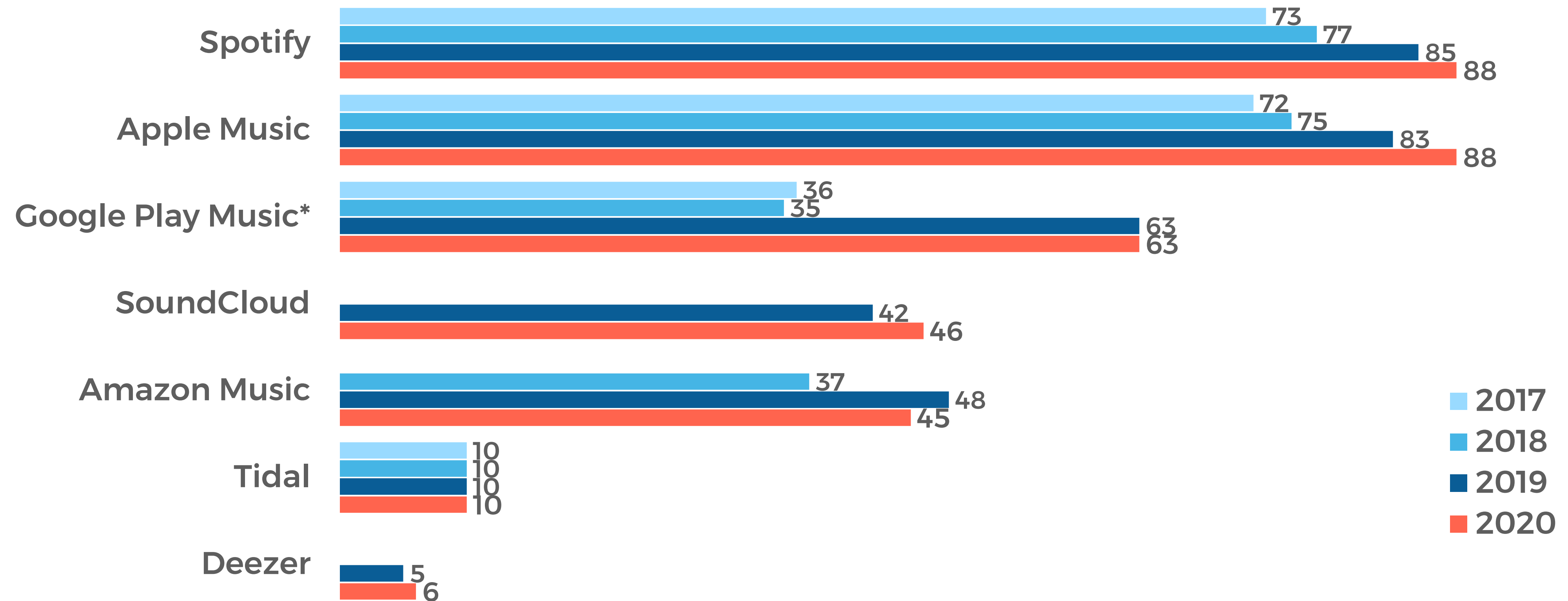


Online Audio Streaming Services

Awareness of Online Audio Streaming Services

TOTAL AUSTRALIAN POPULATION 12+

% AWARE OF ONLINE AUDIO STREAMING SERVICE

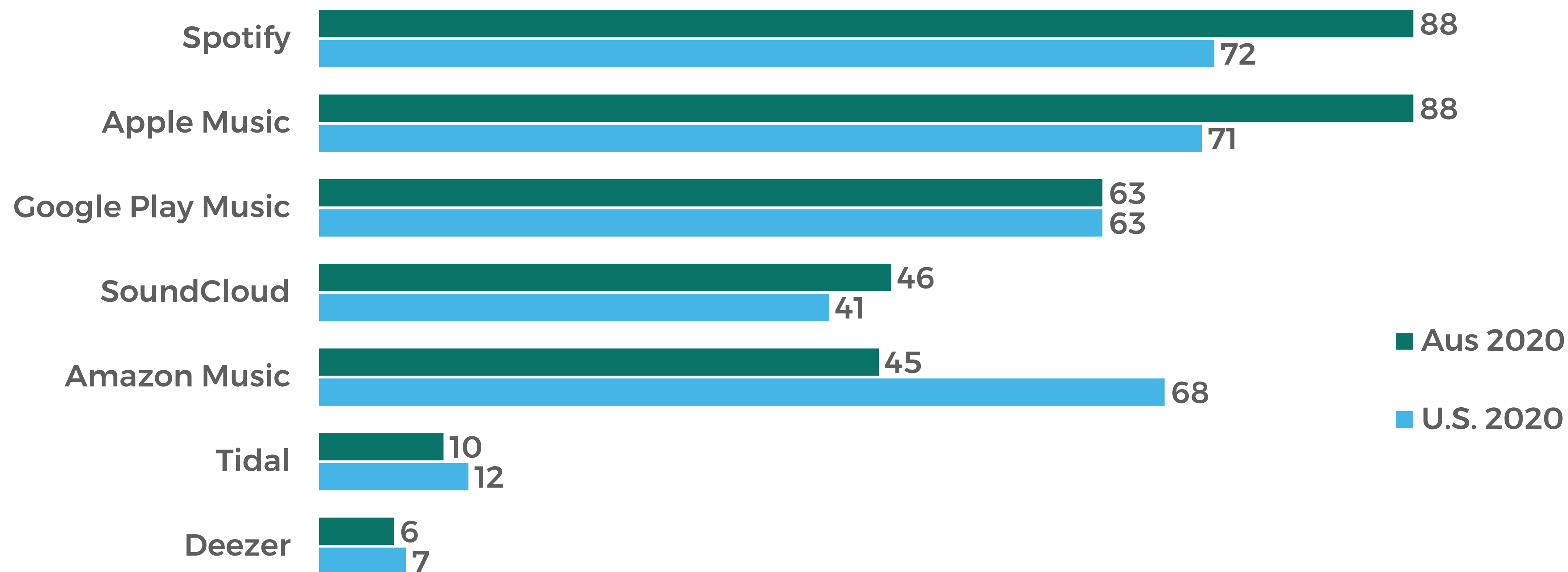


*2017-2018: GOOGLE PLAY ALL ACCESS

Awareness of Online Audio Streaming Services

POPULATIONS 12+

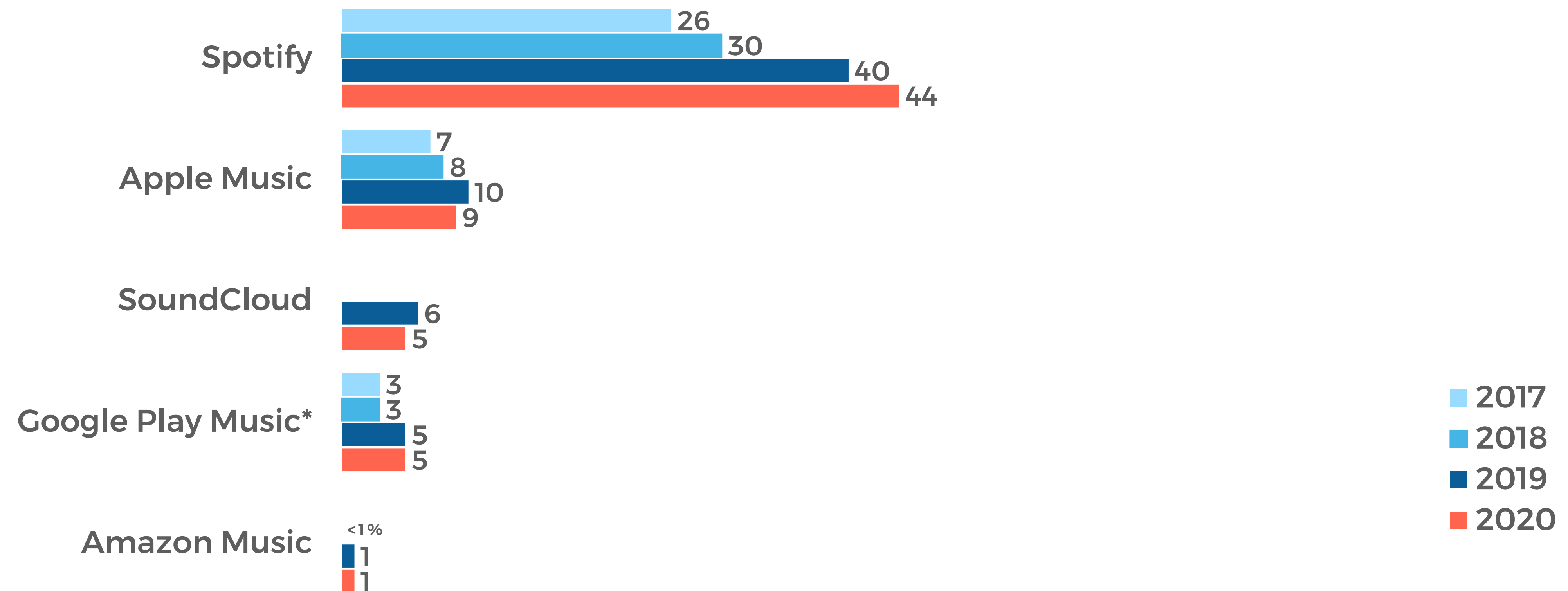
% AWARE OF ONLINE AUDIO STREAMING SERVICE



Listened to Online Audio Streaming Services in Last Month

TOTAL AUSTRALIAN POPULATION 12+

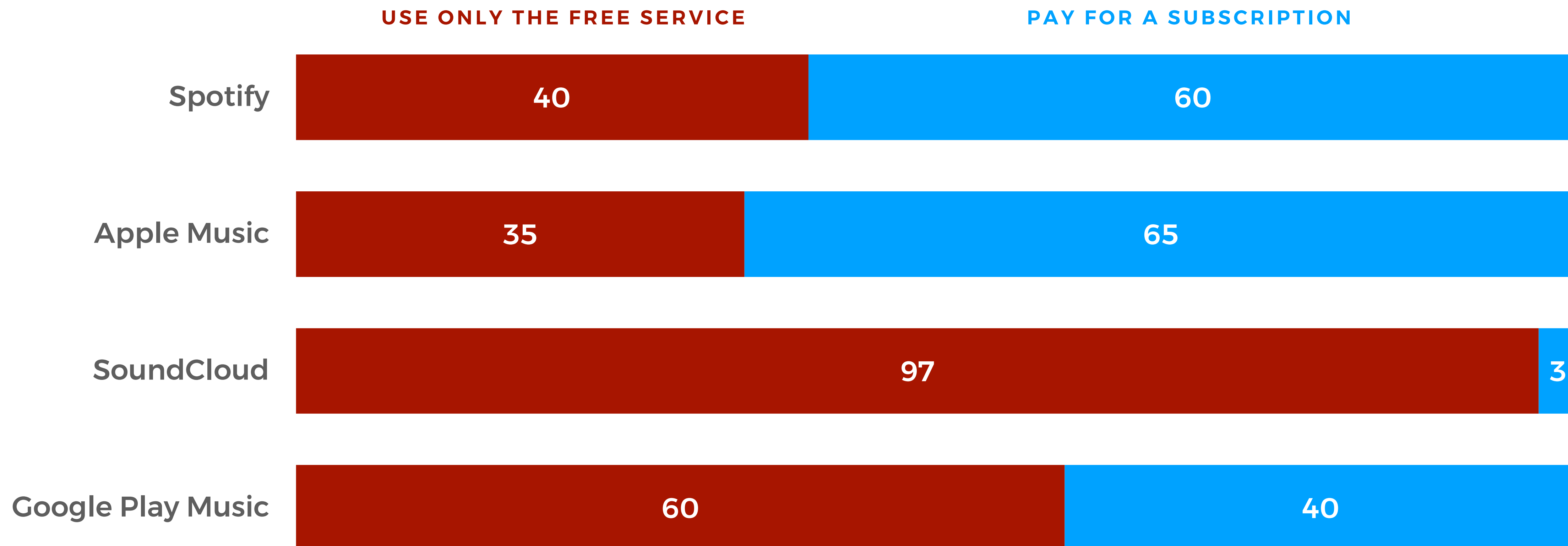
% LISTENED TO ONLINE AUDIO STREAMING SERVICE IN LAST MONTH



*2017-2018: GOOGLE PLAY ALL ACCESS

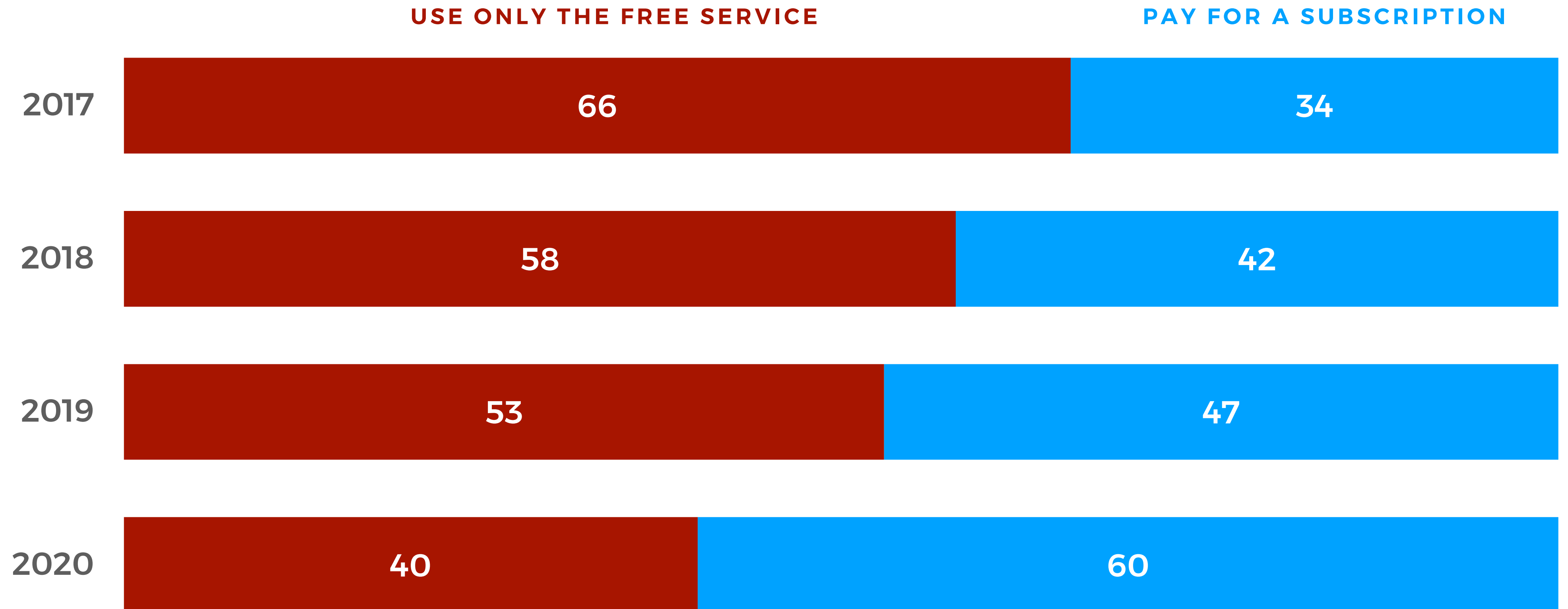
Free vs. Paid Subscriptions to Online Audio Streaming Services

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



Free vs. Paid Subscriptions to Spotify

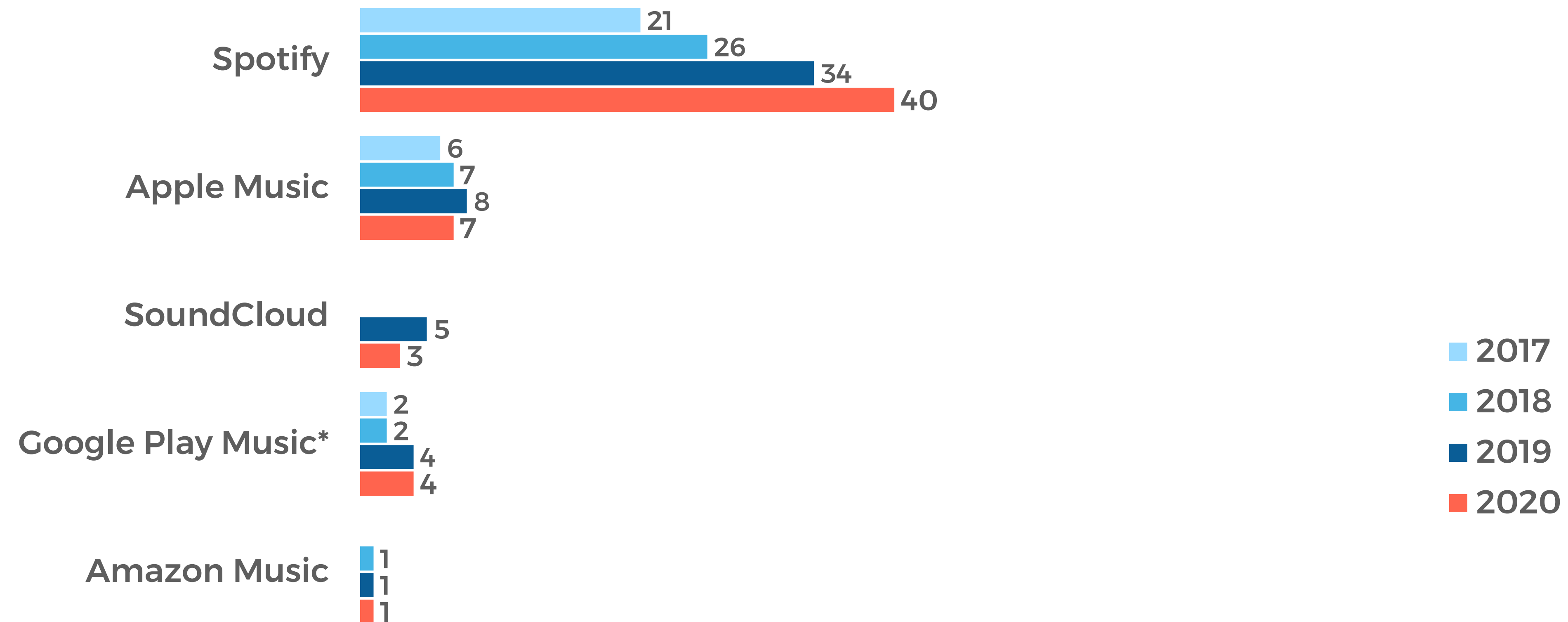
BASE: AUSTRALIAN 12+ AND LISTENED TO SPOTIFY IN LAST MONTH



Weekly Listening to Online Audio Streaming Services

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO ONLINE AUDIO STREAMING SERVICE IN LAST WEEK

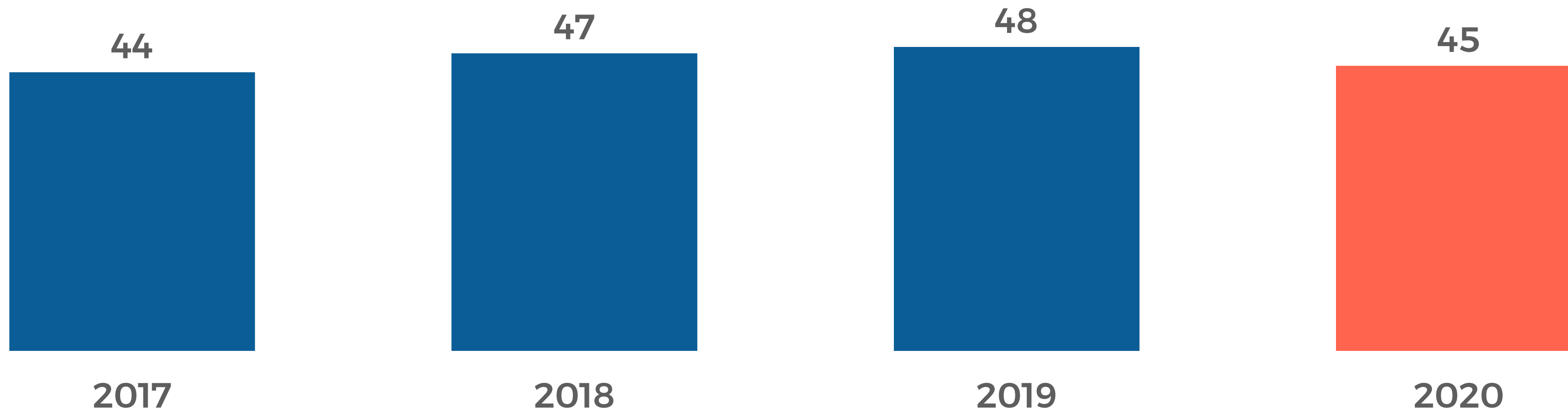


*2017-2018: GOOGLE PLAY ALL ACCESS

Weekly YouTube Music Usage

TOTAL AUSTRALIAN POPULATION 12+

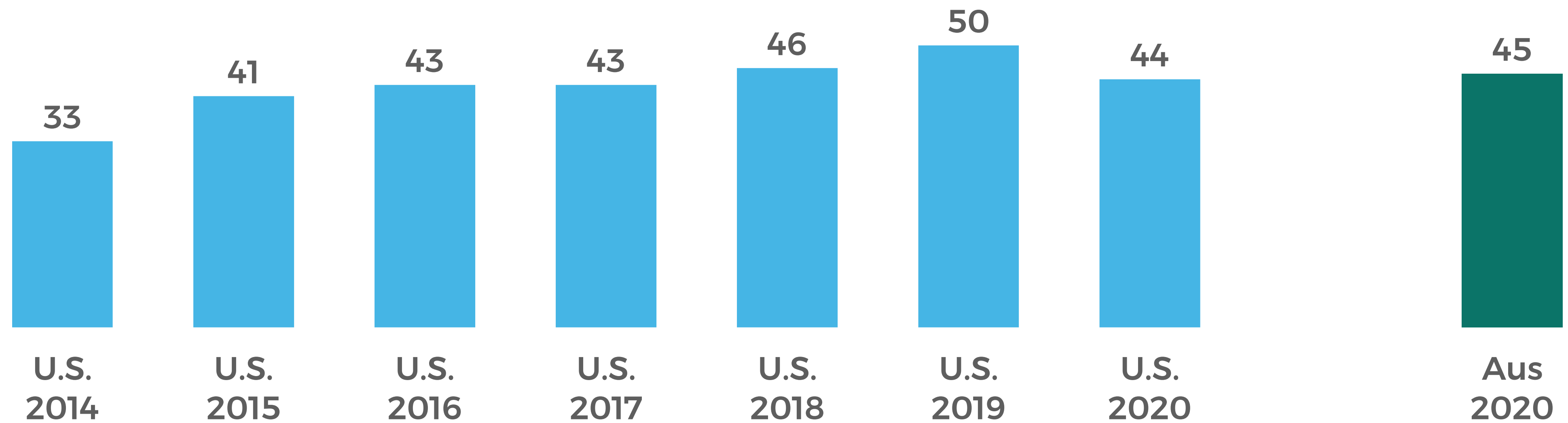
% USED YOUTUBE FOR MUSIC OR MUSIC VIDEOS IN LAST WEEK



Weekly YouTube Music Usage

POPULATIONS 12+

% USED YOUTUBE FOR MUSIC OR MUSIC VIDEOS IN LAST WEEK



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

Observations

- Podcasting continues to grow but lags in comparison to trends from the USA

Observations

- Podcasting continues to grow but lags in comparison to trends from the USA
- Smart speakers represent an exciting new pathway for audio consumption

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