

 THE INFINITE DIAL® 2022

The Infinite Dial 2022

Australia

#InfiniteDial



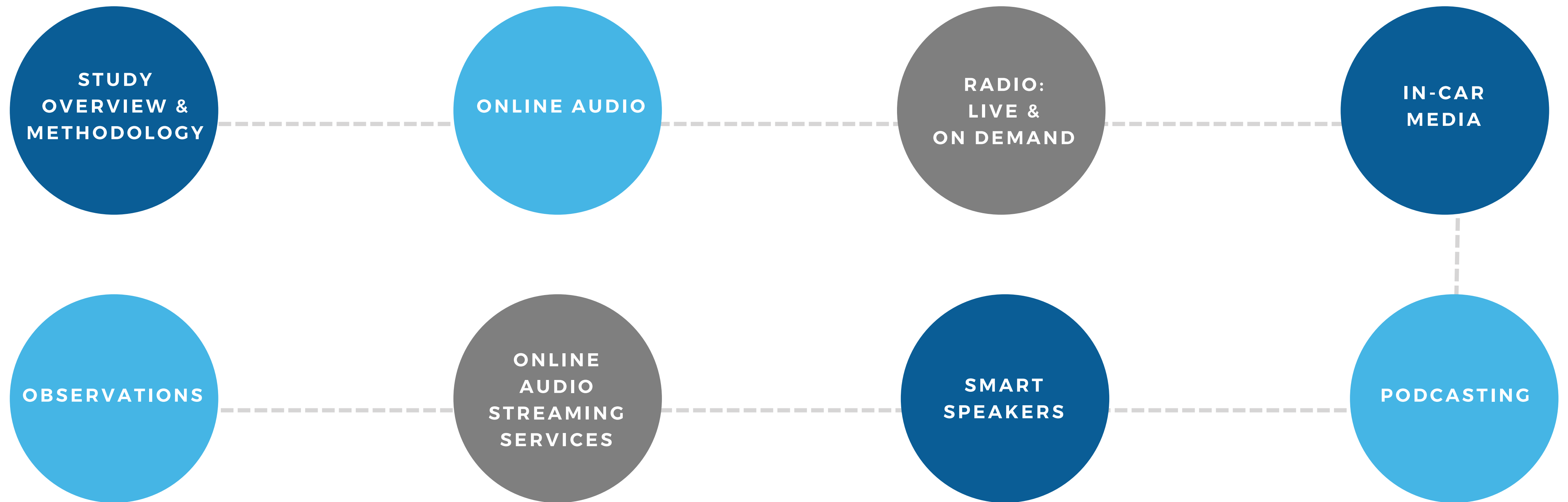
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Presentation Outline



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 sixth annual Infinite Dial Australia report since its debut in 2017
- ▶ This study is designed to allow for direct comparisons between the Australian and U.S. markets

Study Methodology

- ▶ In the first quarter of 2022, 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® 2022

Online Audio

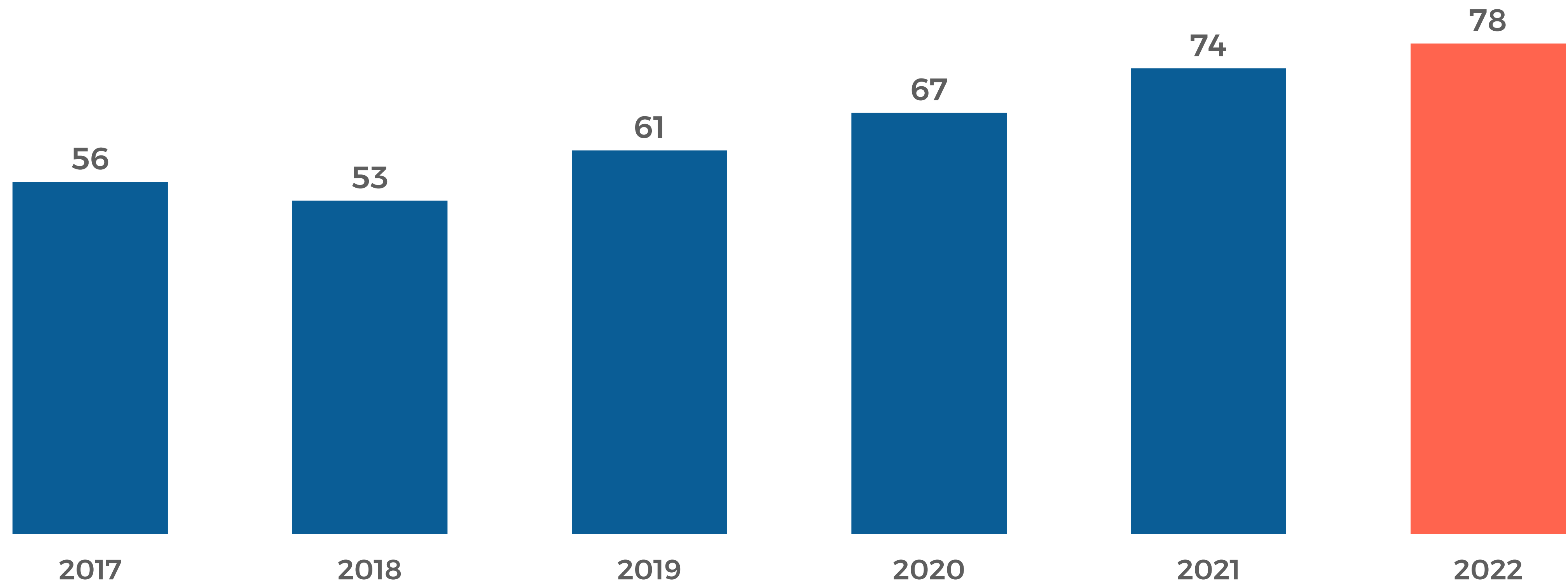


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Monthly Online Audio Listening

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO ONLINE AUDIO IN LAST MONTH

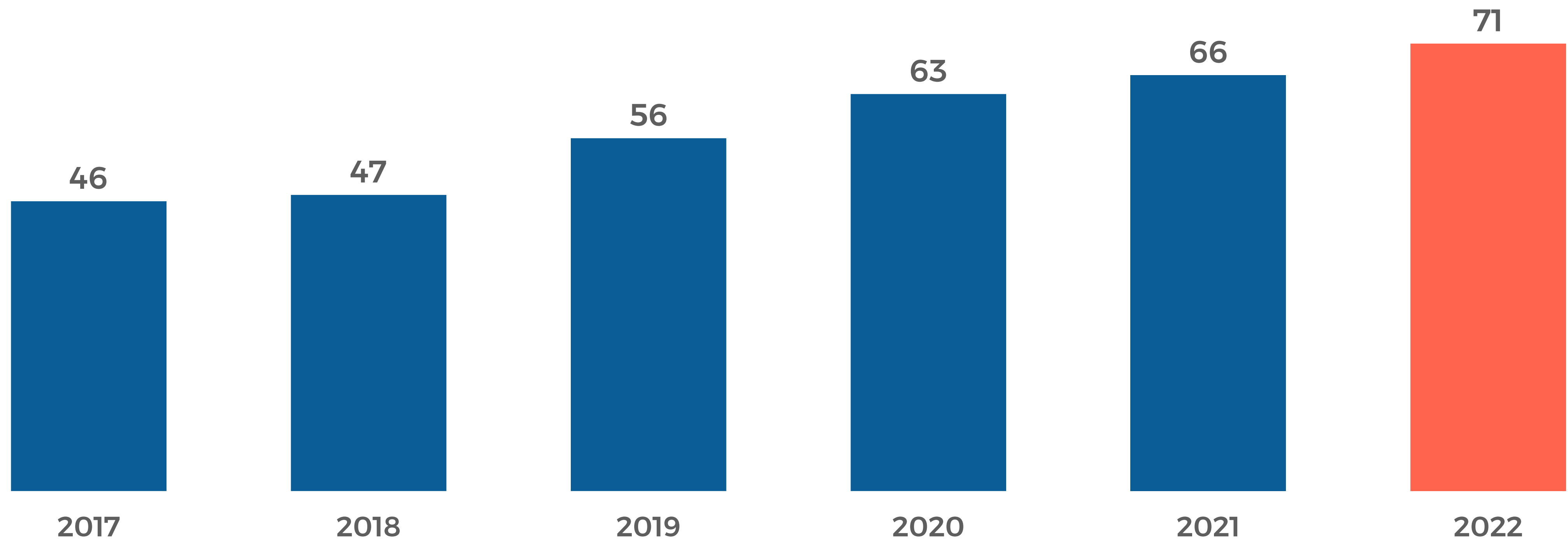


ONLINE AUDIO = LISTENING TO AM/FM/DAB+ RADIO STATIONS ONLINE AND/OR LISTENING TO AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET INCLUDING PODCASTS AND STREAMING SERVICES

Weekly Online Audio Listening

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO ONLINE AUDIO IN LAST WEEK

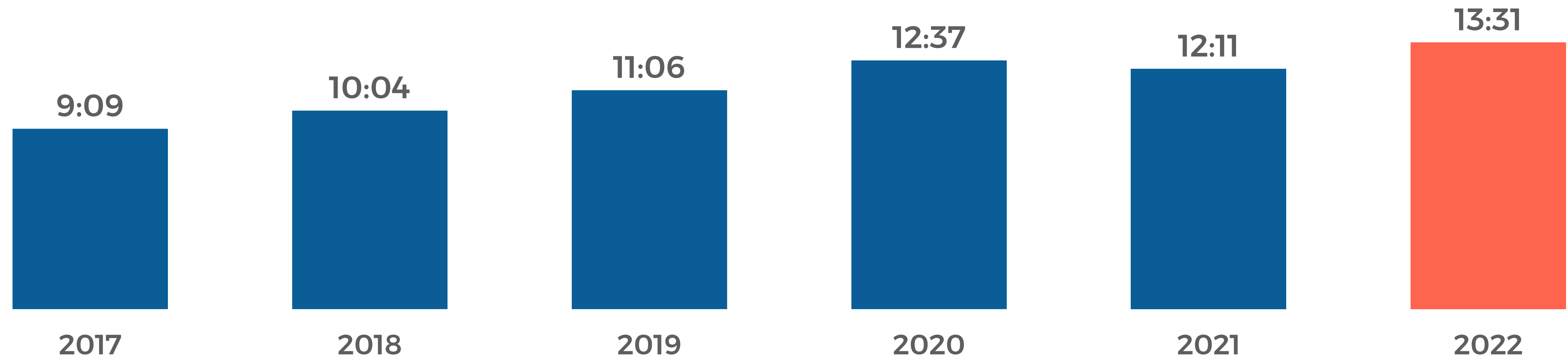


ONLINE AUDIO = LISTENING TO AM/FM/DAB+ RADIO STATIONS ONLINE AND/OR LISTENING TO AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET INCLUDING PODCASTS AND STREAMING SERVICES

Average Time Spent Listening to Online Audio

BASE: AUSTRALIAN 12+ WEEKLY ONLINE AUDIO LISTENERS

HOURS: MINUTES IN LAST WEEK



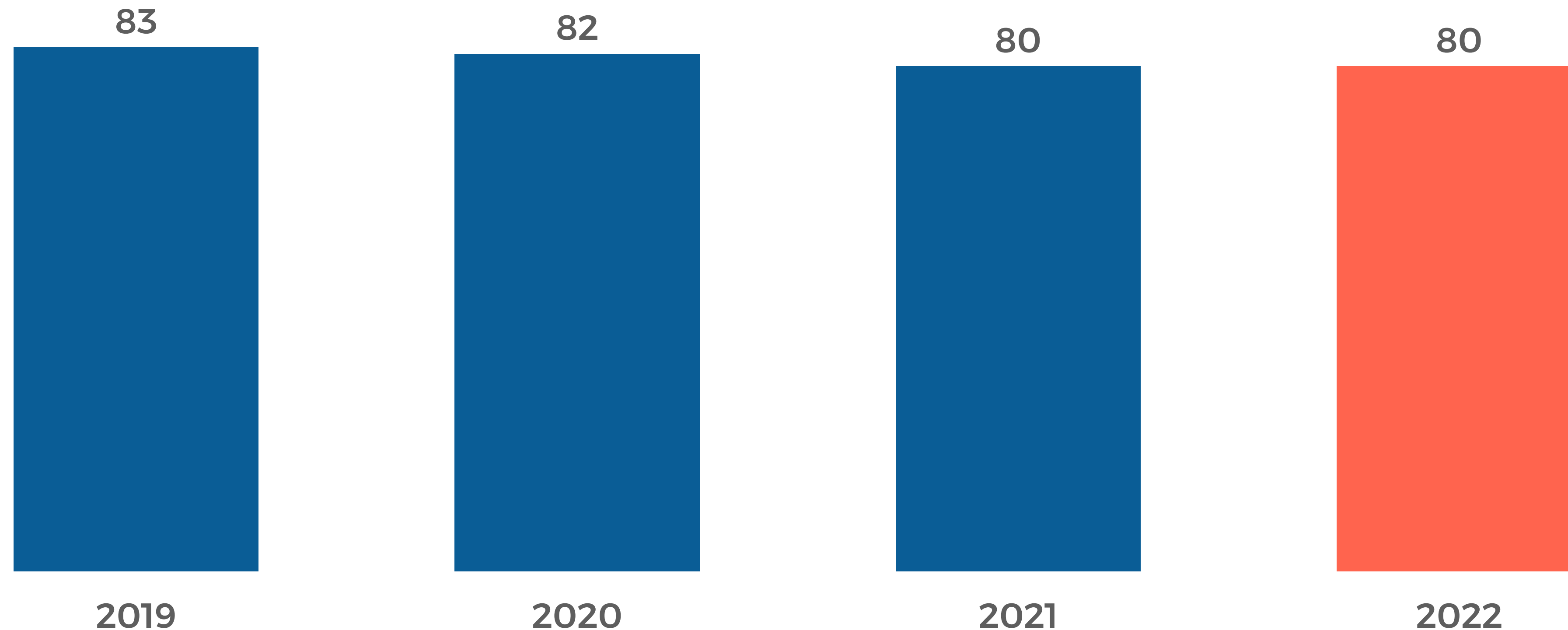
ONLINE AUDIO = LISTENING TO AM/FM/DAB+ RADIO STATIONS ONLINE AND/OR LISTENING TO AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET INCLUDING PODCASTS AND STREAMING SERVICES

Radio: Live & On Demand

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

TOTAL AUSTRALIAN POPULATION 12+

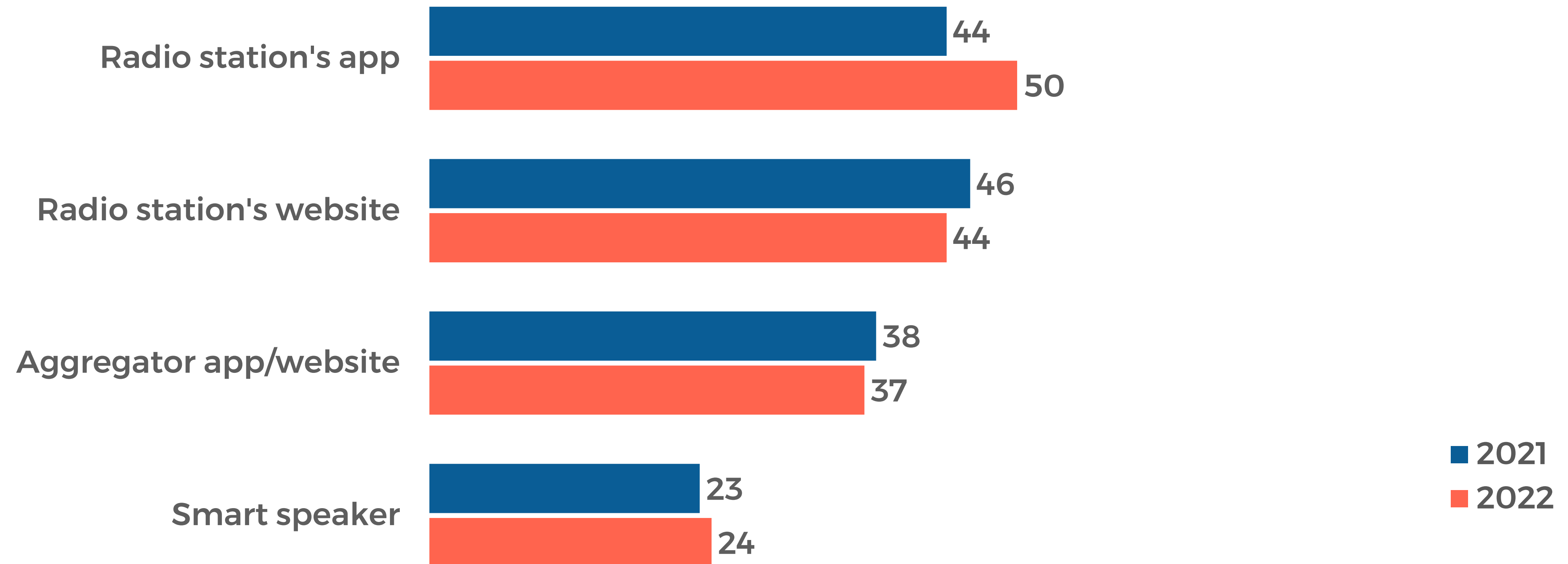
% LISTENED TO OVER-THE-AIR OR ONLINE AM/FM/DAB+ RADIO FOR AT LEAST 15 MINUTES IN LAST WEEK OR CATCH-UP PODCASTS AT LEAST ONCE A WEEK



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

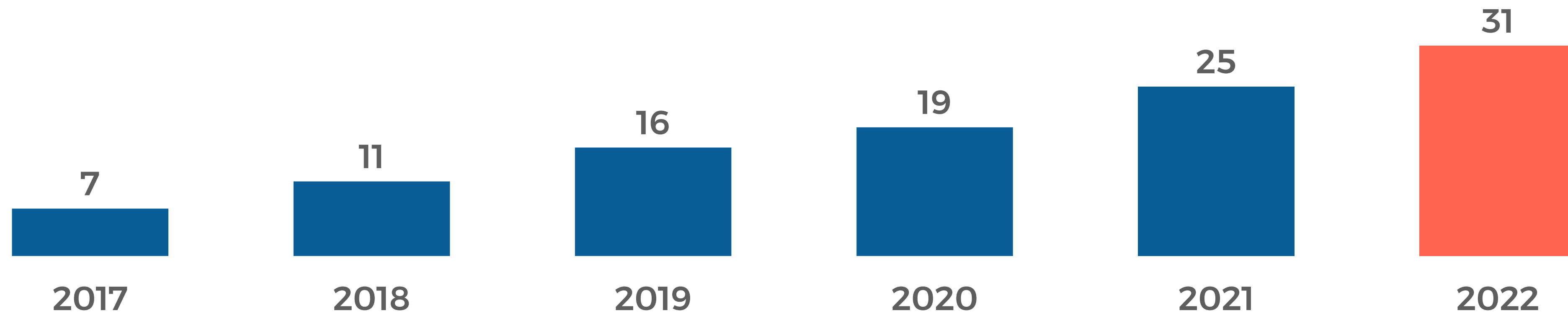


In-Car Media

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

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

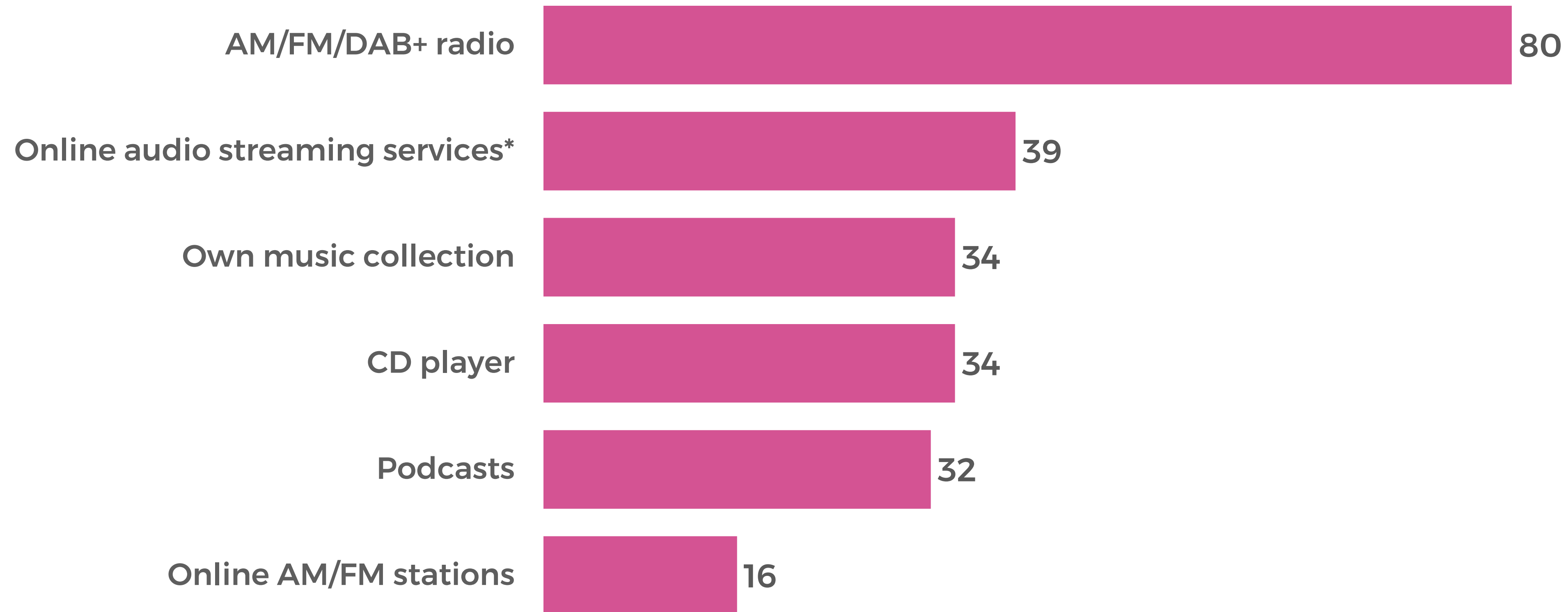
% OWNING IN-DASH SYSTEM THAT RECEIVES INFORMATION/ENTERTAINMENT OVER THE INTERNET



Audio Sources Used in Car

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

% USING AUDIO SOURCE IN CAR

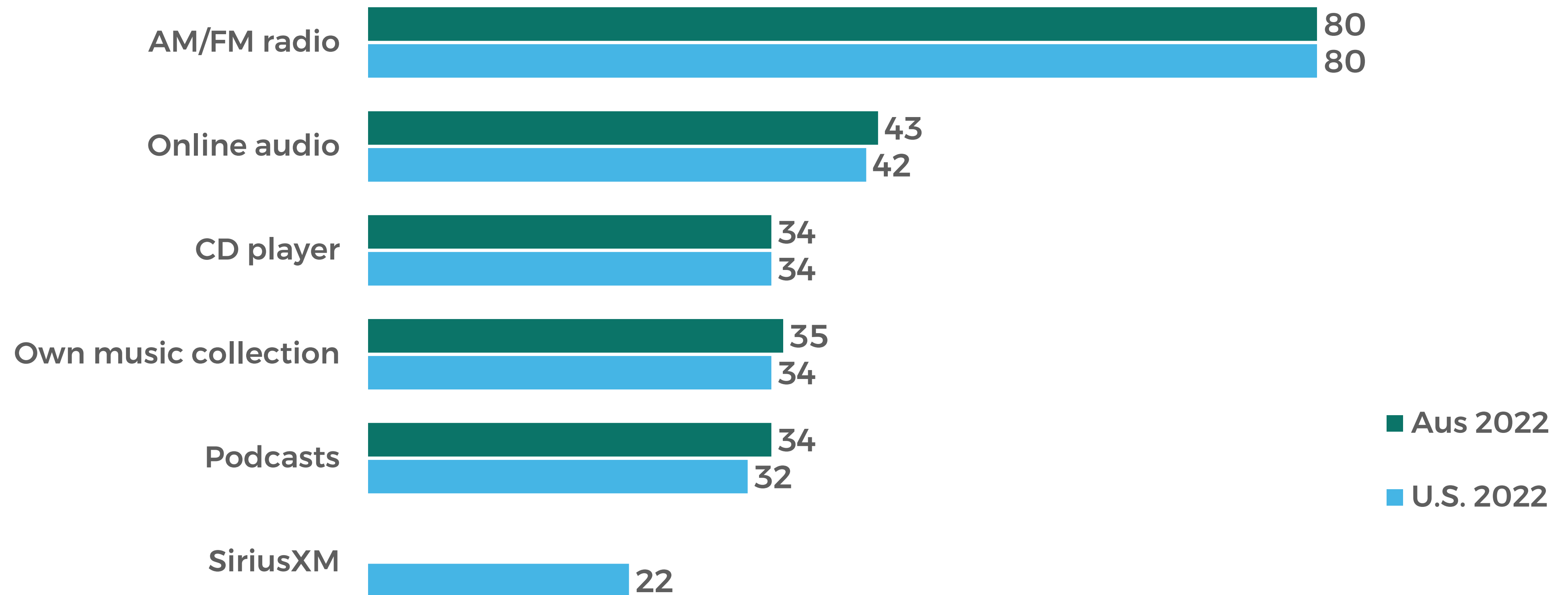


**SUCH AS SPOTIFY, YOUTUBE, OR APPLE MUSIC*

Audio Sources Used in Car

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

% USING AUDIO SOURCE IN CAR

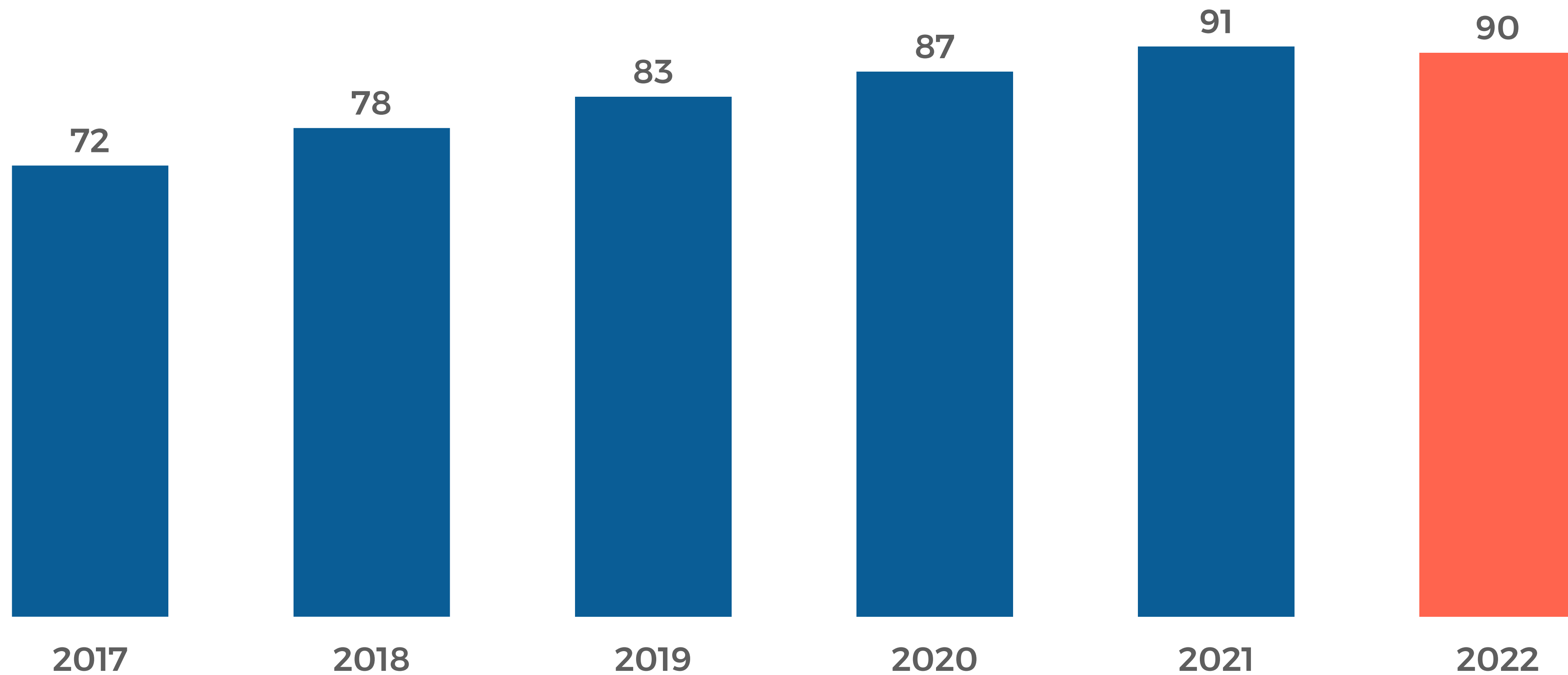


Podcasting

Podcasting Awareness

TOTAL AUSTRALIAN POPULATION 12+

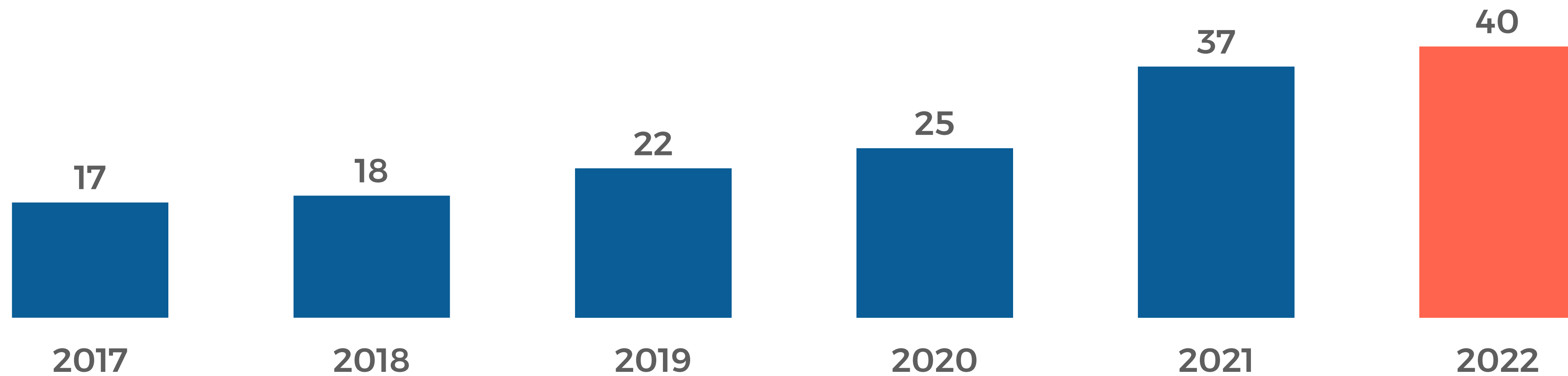
% AWARE OF PODCASTING



Monthly Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+

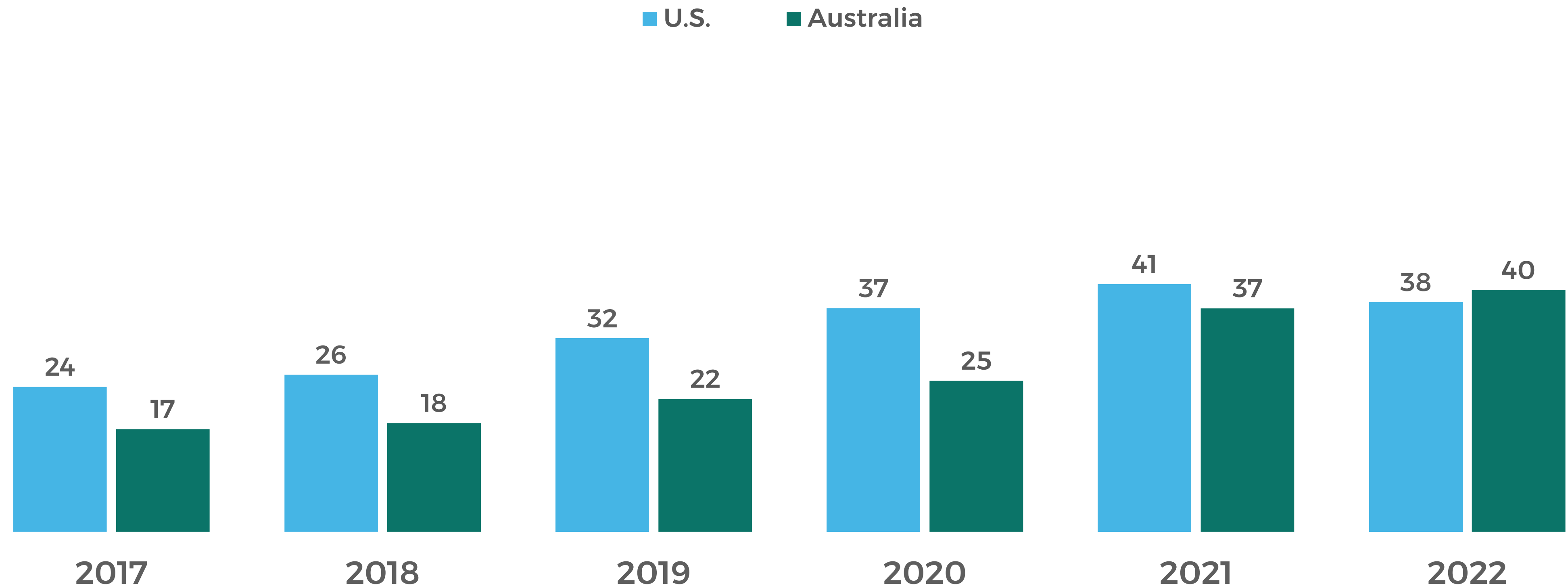
% LISTENED TO A PODCAST IN LAST MONTH



Monthly Podcast Listening

POPULATIONS 12+

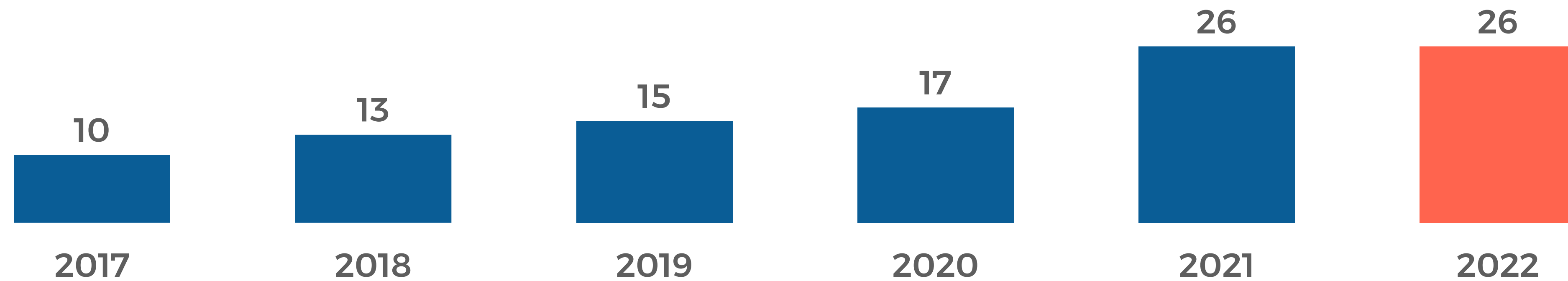
% LISTENED TO A PODCAST IN LAST MONTH



Weekly Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+

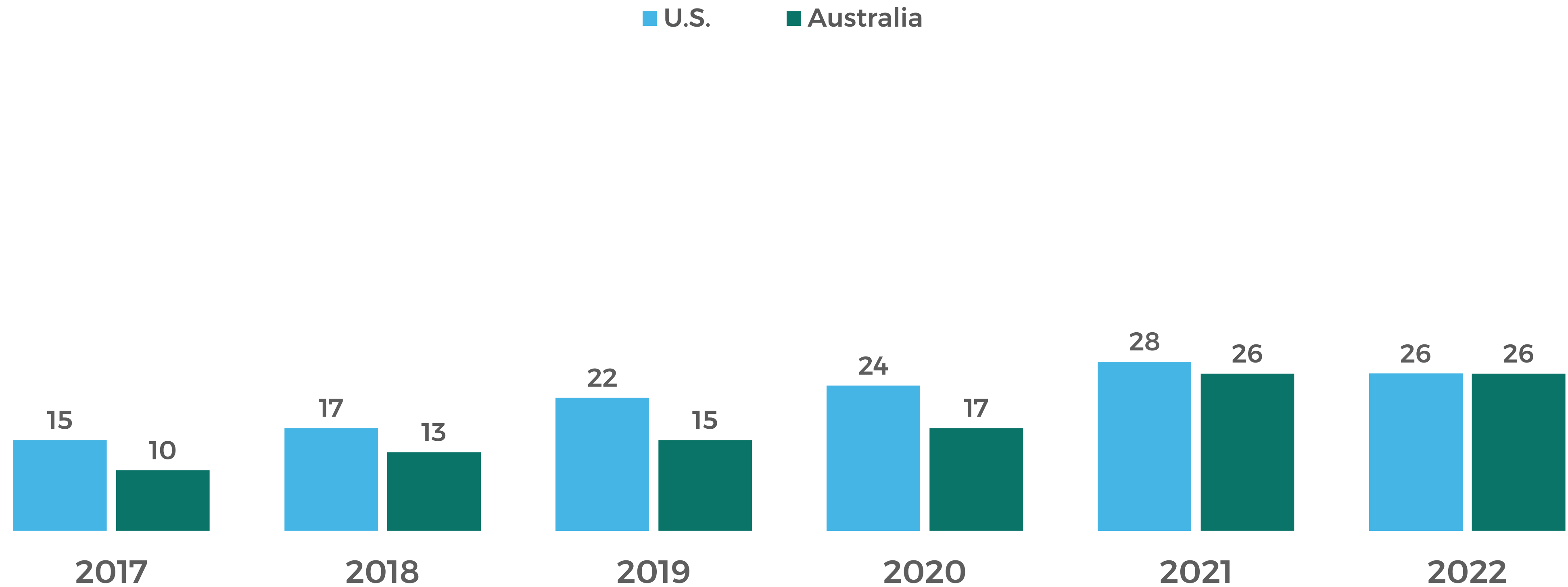
% LISTENED TO A PODCAST IN LAST WEEK



Weekly Podcast Listening

POPULATIONS 12+

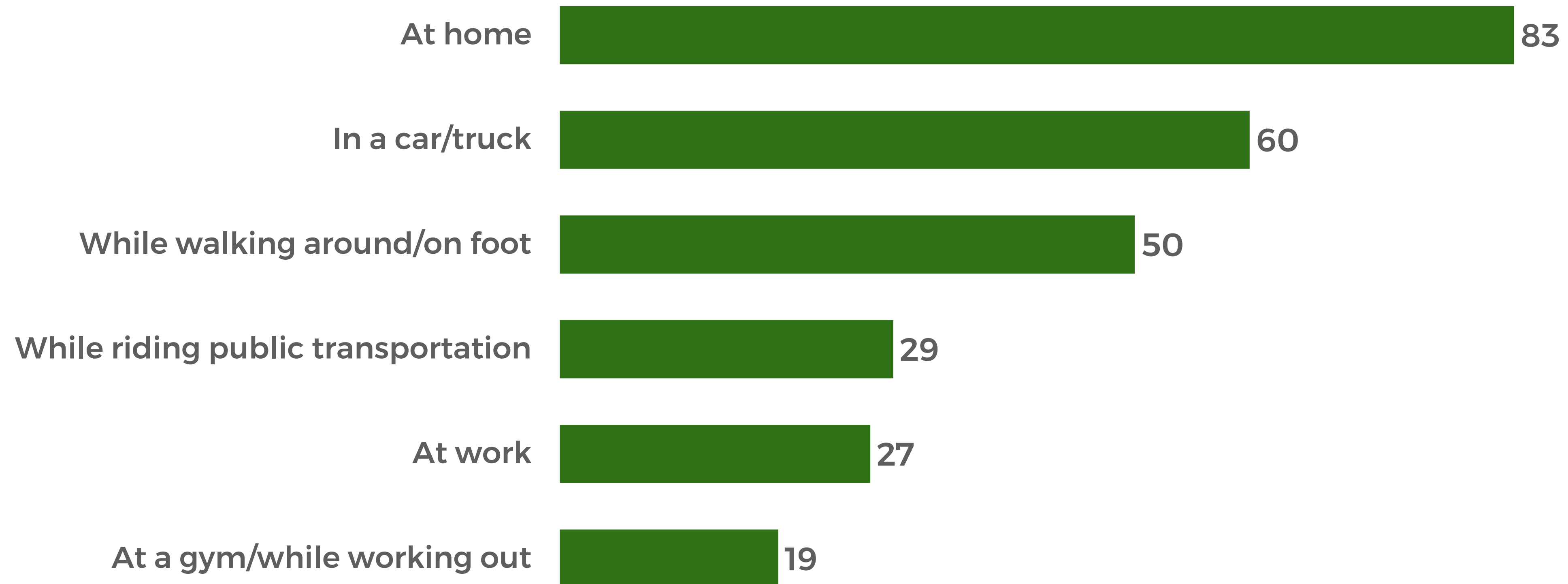
% LISTENED TO A PODCAST IN LAST WEEK



Podcast Listening Locations

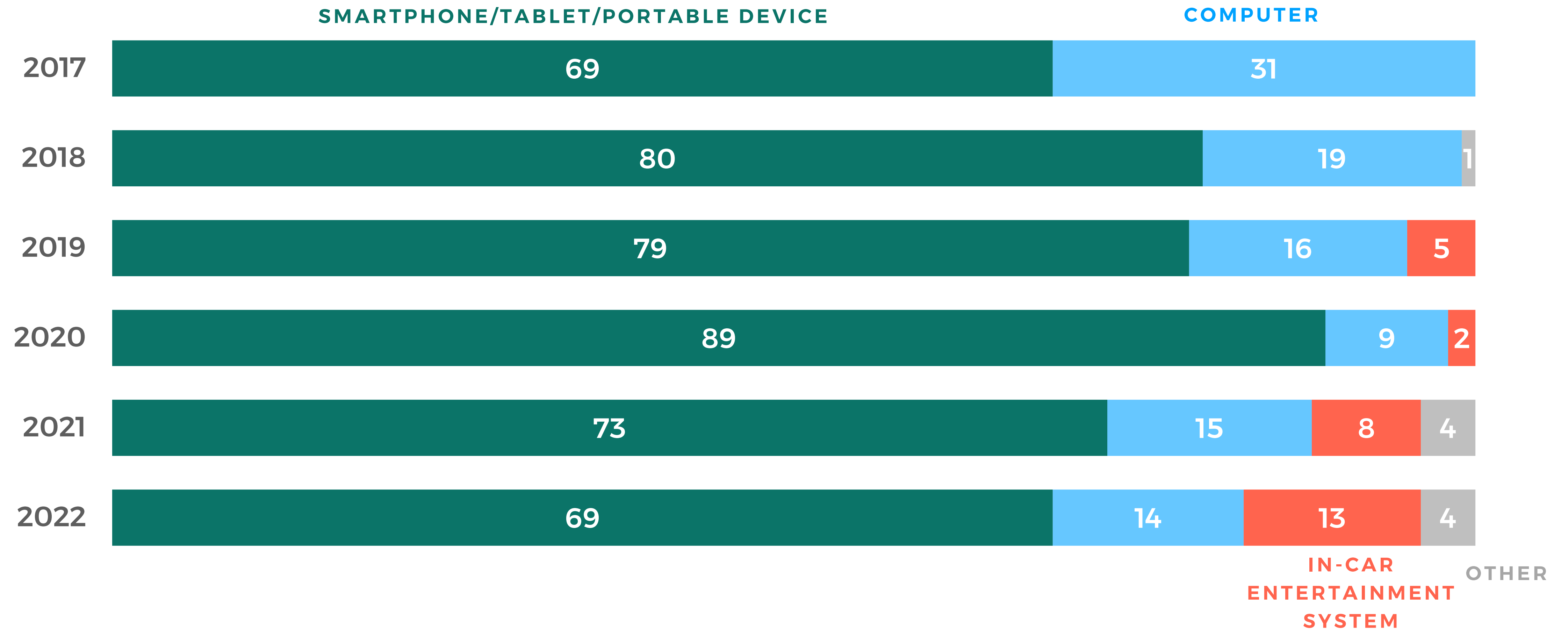
BASE: AUSTRALIAN 12+ AND LISTENED TO PODCAST IN LAST MONTH; 40%

% LISTENED TO A PODCAST IN LOCATION



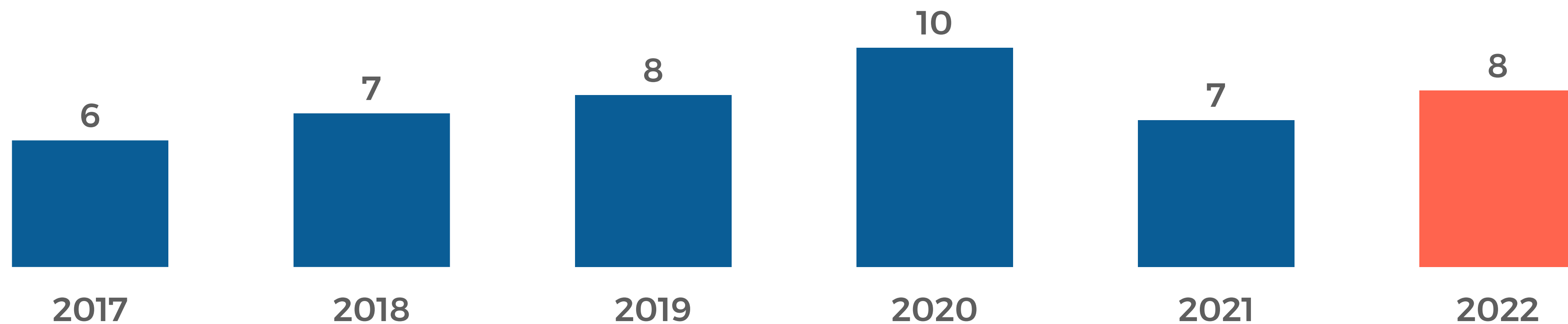
Device Used Most Often to Listen to Podcasts

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



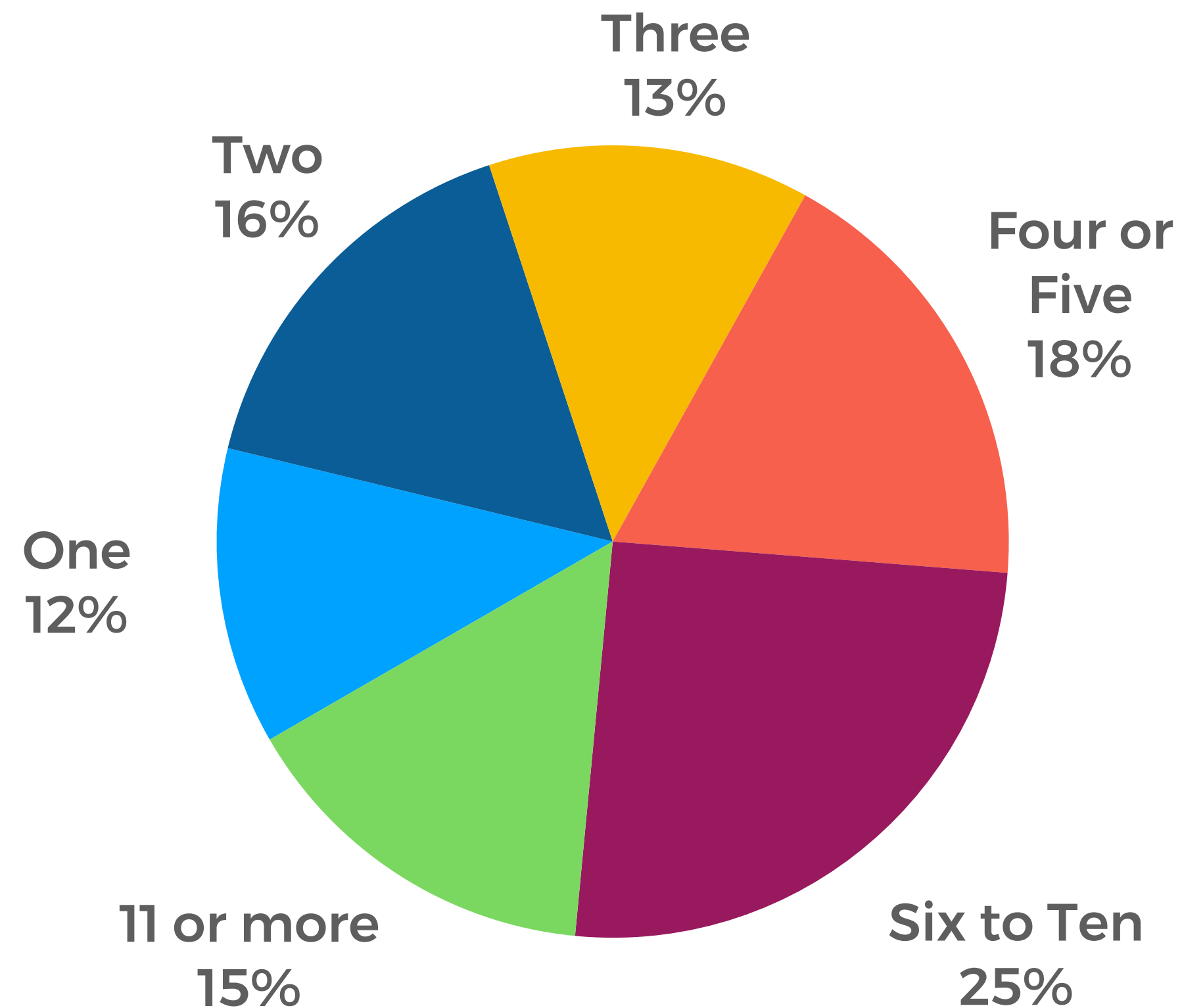
Average Number of Podcasts Subscribed to

BASE: AUSTRALIAN 12+ MONTHLY PODCAST LISTENERS WHO SUBSCRIBE TO PODCASTS; 39%



Number of Podcast Episodes Listened to in Last Week

BASE: AUSTRALIAN 12+ AND LISTENED TO PODCAST IN LAST WEEK; 28%

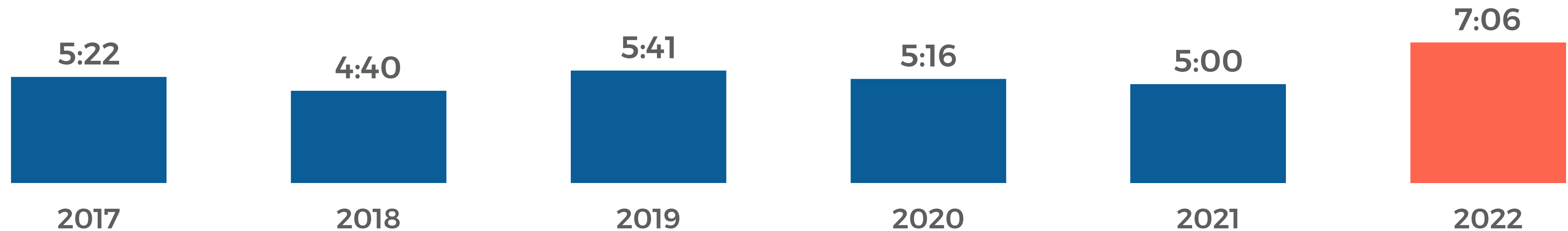


Australian weekly podcast listeners averaged
seven episodes
in the last week

Average Time Spent Listening to Podcasts

BASE: AUSTRALIAN AGE 12+ WEEKLY PODCAST LISTENERS

HOURS:MINUTES IN LAST WEEK

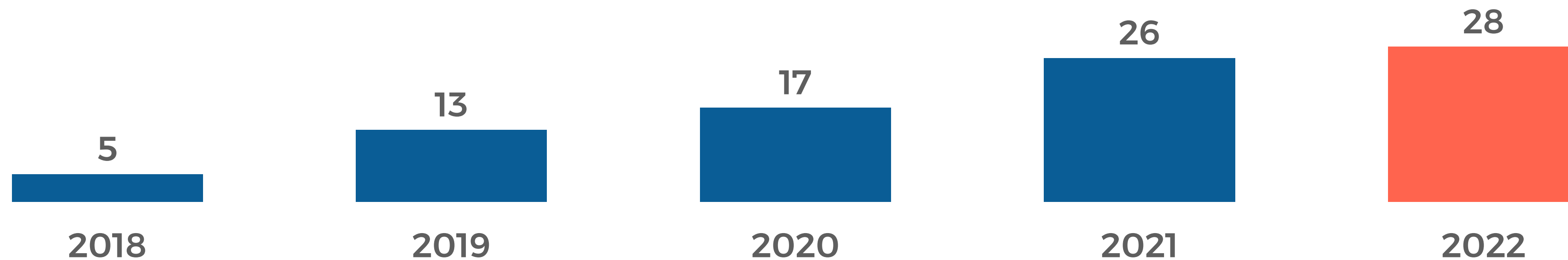


Smart Speakers

Smart Speaker Ownership

TOTAL AUSTRALIAN POPULATION 12+

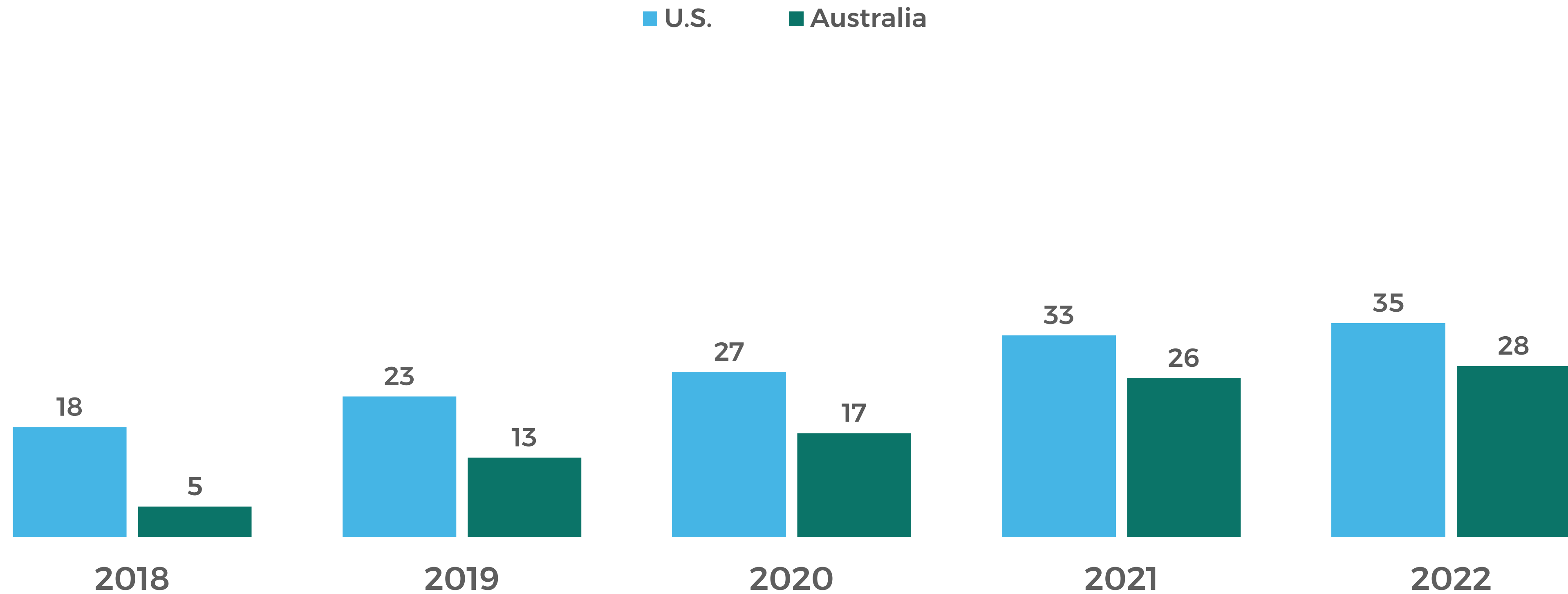
% OWNING A SMART SPEAKER



Smart Speaker Ownership

POPULATIONS 12+

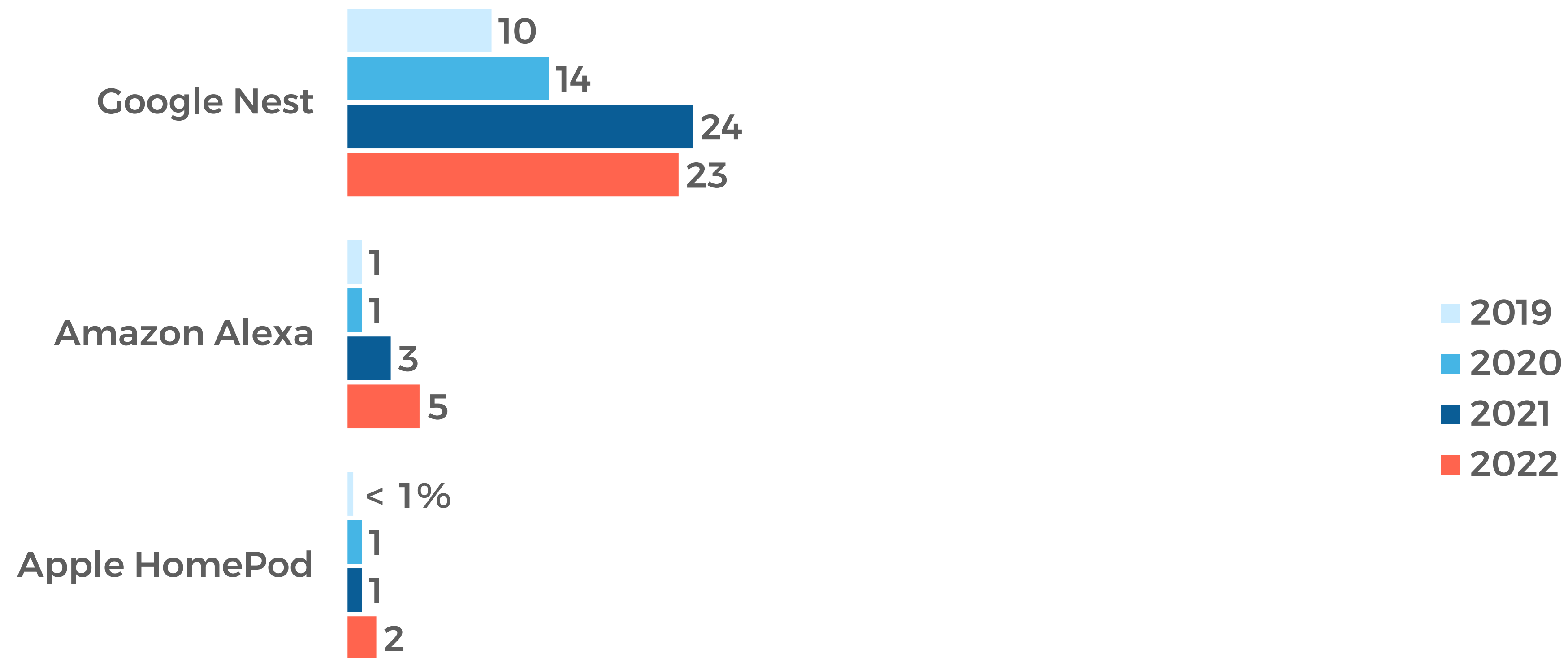
% OWNING A SMART SPEAKER



Smart Speaker Ownership

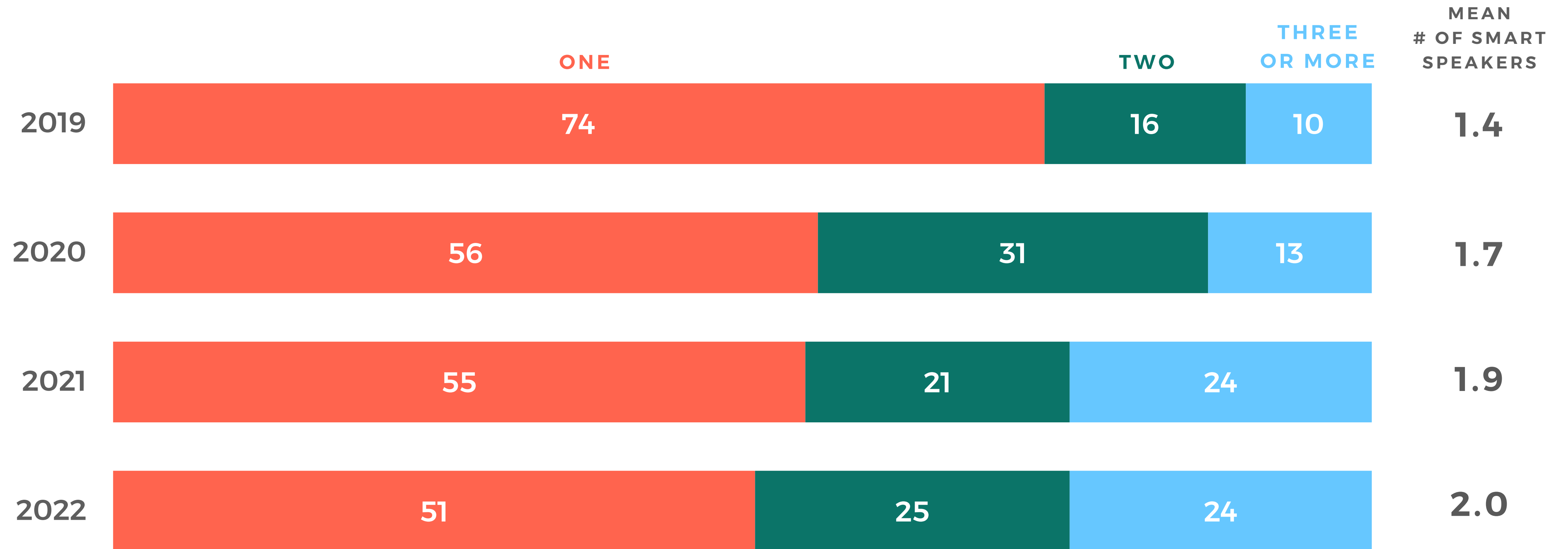
TOTAL AUSTRALIAN POPULATION 12+

% OWNING SMART SPEAKER BRAND



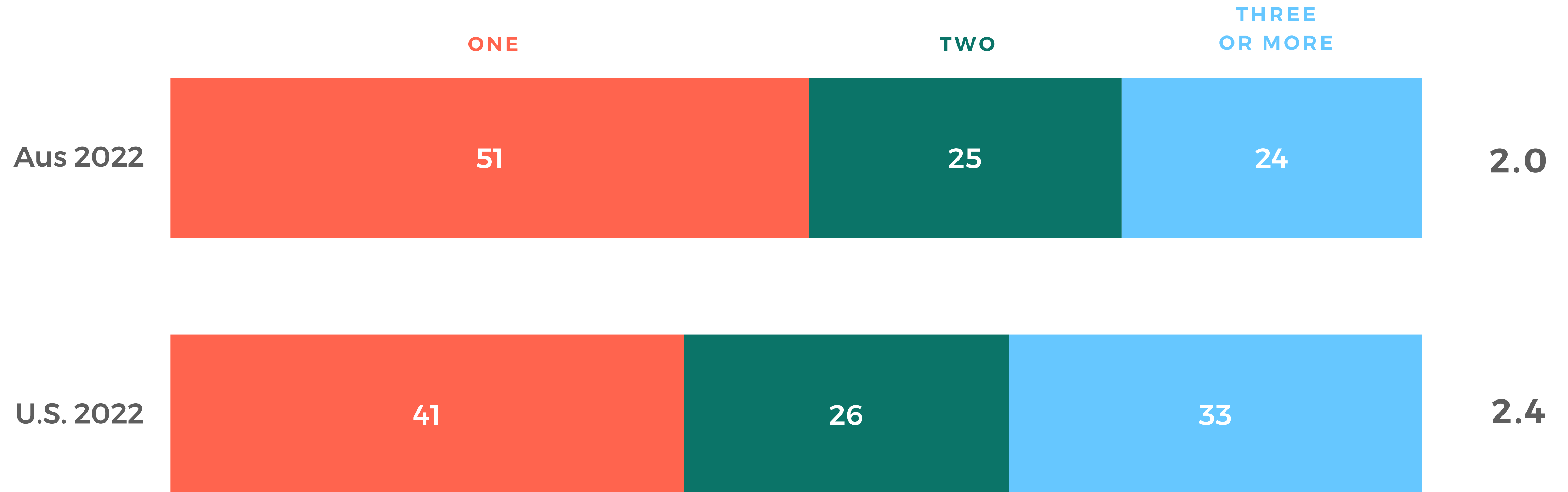
Number of Smart Speakers in Household

BASE: AUSTRALIAN 12+ WHO OWN A SMART SPEAKER



Number of Smart Speakers in Household

BASE: AGE 12+ WHO OWN A SMART SPEAKER



Smart Speaker Owners agree: “You are listening to more audio since you got your smart speaker”

AUS smart speaker owners

59

U.S. smart speaker owners

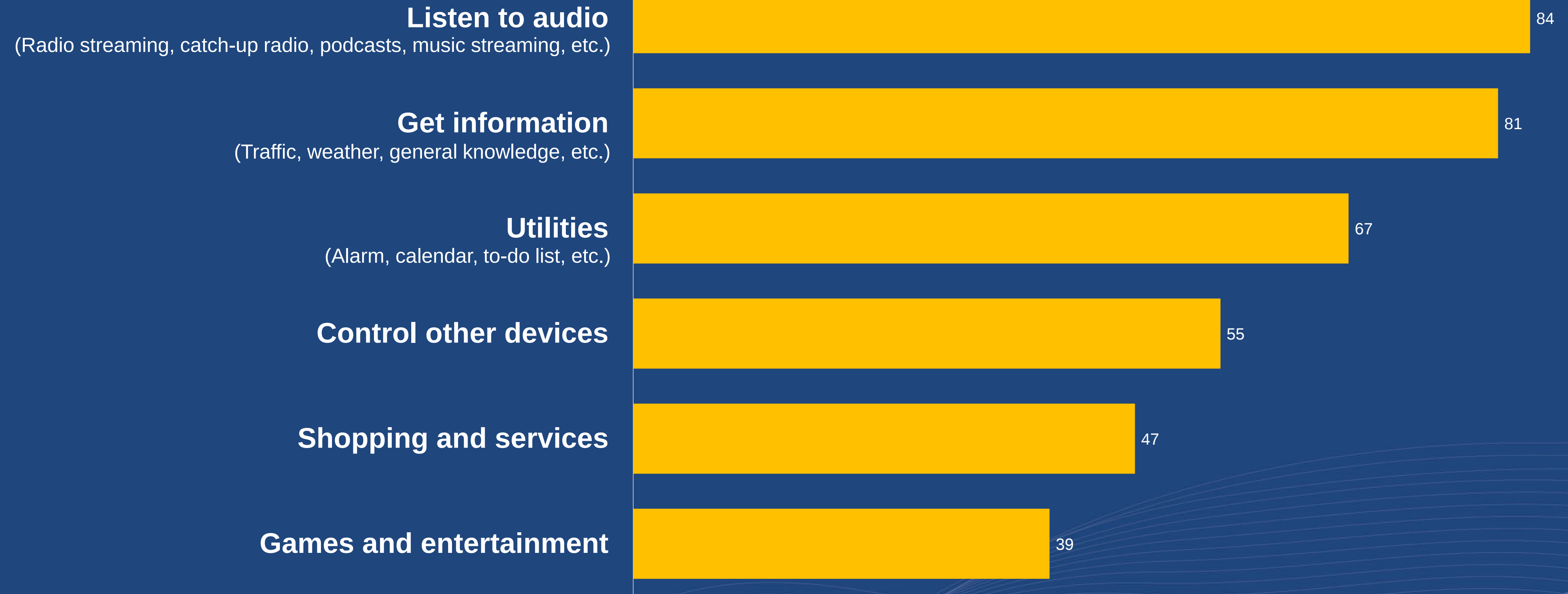
55

% agreeing

Base: Smart speaker owners

Smart speaker owners

Top Weekly Smart Speaker Requests:



% who request type of action in a typical week

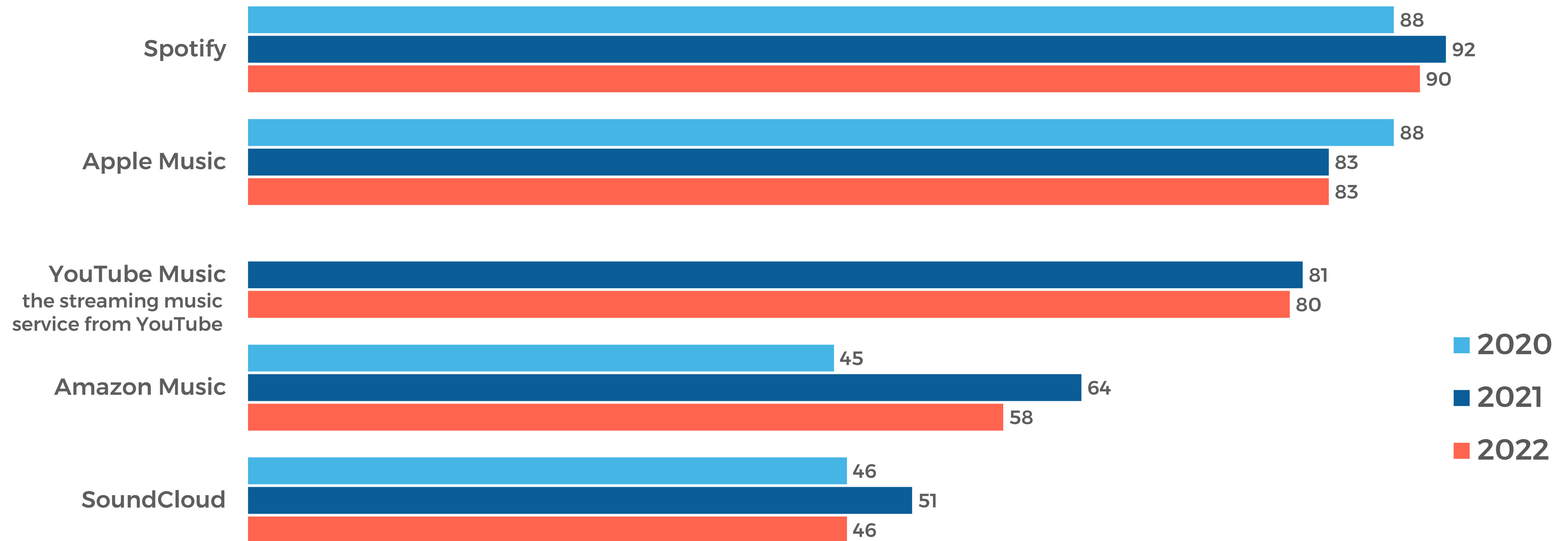
Base: Own a smart speaker

Online Audio Streaming Services

Awareness of Online Audio Streaming Services

TOTAL AUSTRALIAN POPULATION 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

USE ONLY THE FREE SERVICE

PAY FOR A SUBSCRIPTION

Spotify

37

63

YouTube Music
the streaming music
service from YouTube

73

27

SoundCloud

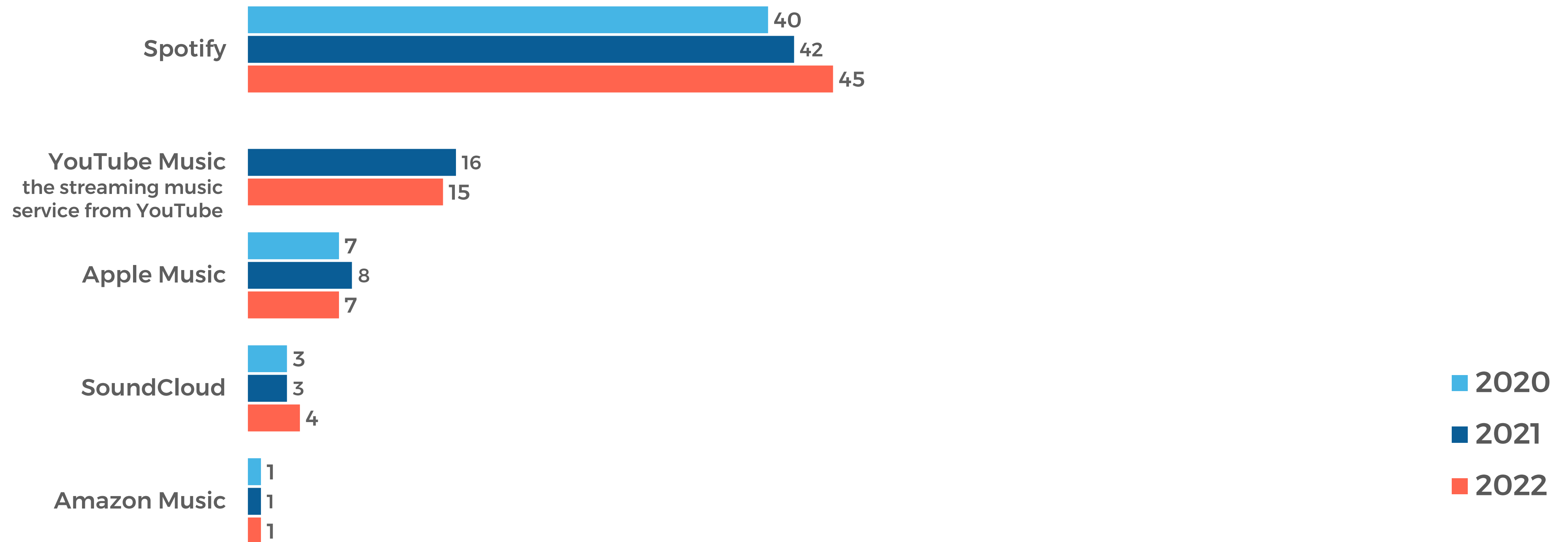
88

12

Weekly Listening to Online Audio Streaming Services

TOTAL AUSTRALIAN POPULATION 12+

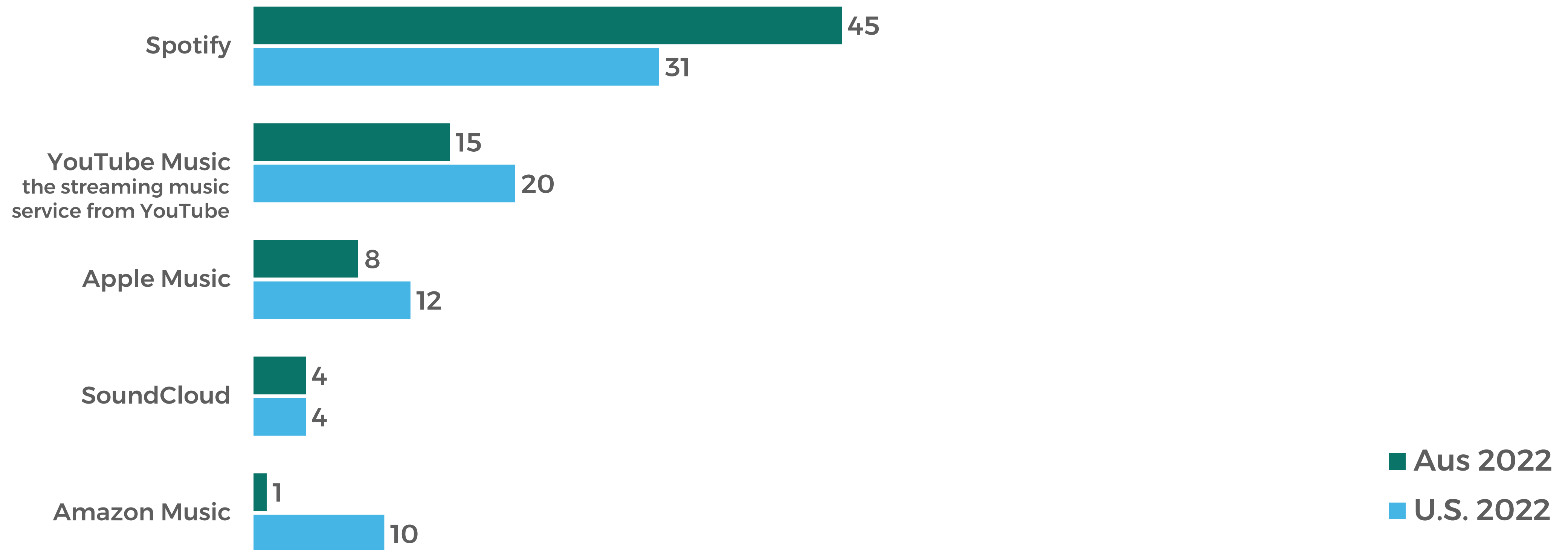
% LISTENED TO ONLINE AUDIO STREAMING SERVICE IN LAST WEEK



Weekly Listening to Online Audio Streaming Services

POPULATIONS 12+

% LISTENED TO ONLINE AUDIO STREAMING SERVICE IN LAST WEEK



Observations

- Digital audio options continue to grow in Australia, with nearly four-in-five Australians age 12 and older now using online audio monthly

Observations

- Despite the growth in native digital audio options such as pureplay streamers and podcasts, radio listening shows no year-on-year diminishment and Australian radio measures exceed what we see in other countries around the world

Observations

- Podcasting continues to grow with monthly listening now 40% of all Australians age 12 and over – and this estimate now exceeds what we see in the USA

Observations

- Smart Speakers also continue to make their mark in Australian homes, now with nearly 30% of Australians owning at least one device



The Infinite Dial 2022 Australia

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