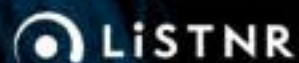


 THE INFINITE DIAL 2023

# The Infinite Dial 2023

Australia



#InfiniteDial

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# Presentation Outline



# 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
- The Infinite Dial is the longest-running survey of digital media consumer behaviour in America
- This is the seventh annual Infinite Dial Australia report since its debut in 2017
- This study is designed to allow for direct comparisons among Australia and other English-speaking countries where Infinite Dial has been conducted

# Study Methodology

- In the first quarter of 2023, Edison Research conducted a national survey of 1,576 respondents in Australia aged 12 and older
  - 750 interviews conducted via telephone
  - 756 interviews conducted online
- Data weighted to national 12+ population figures



 THE INFINITE DIAL 2023

# AM/FM/DAB+ RADIO



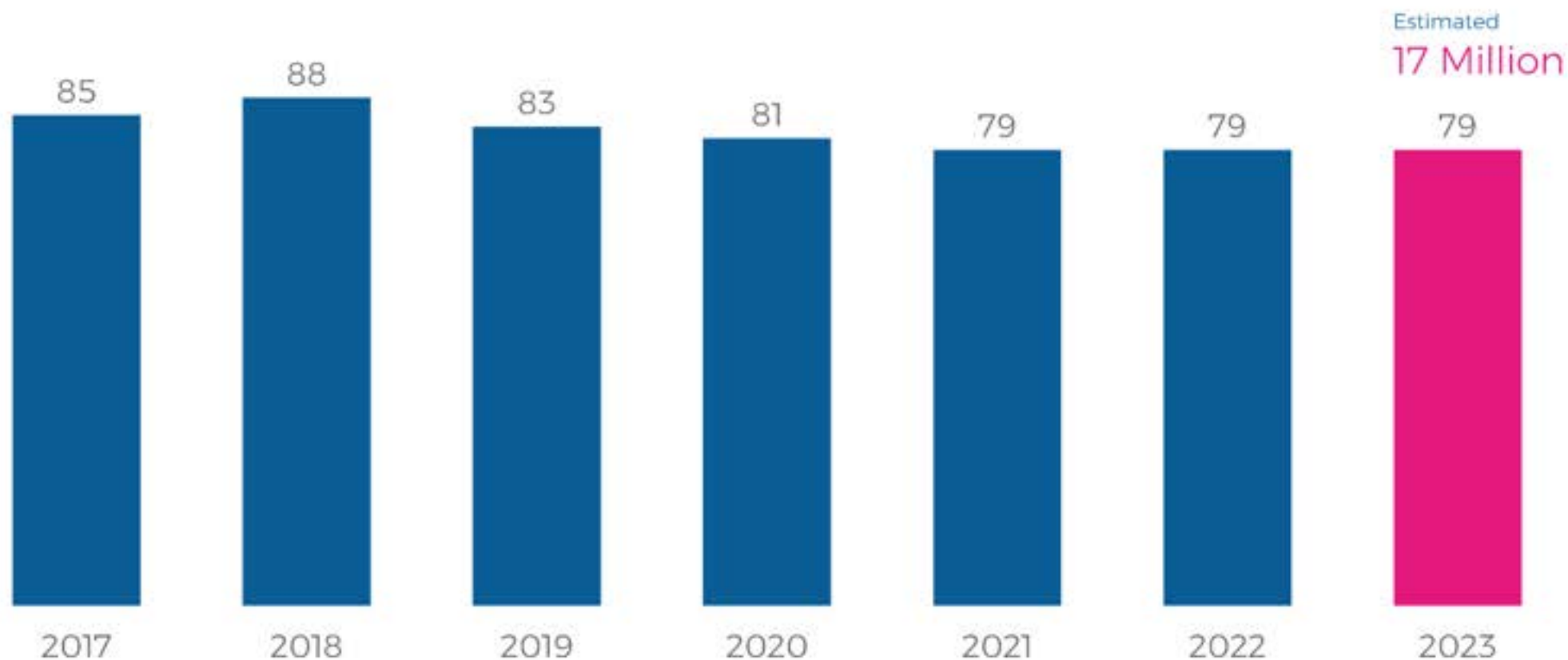
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# Listening to AM/FM/DAB+ Radio in the Last Week

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO AM/FM/DAB+ RADIO IN THE LAST WEEK

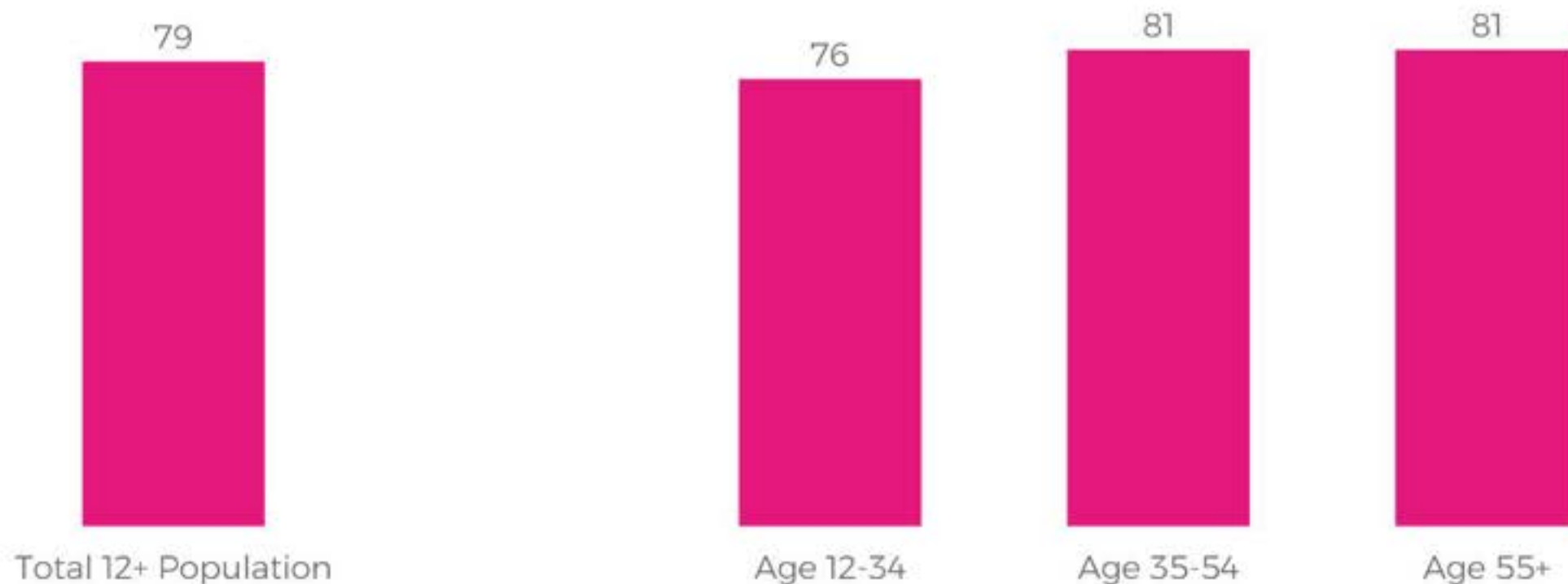


AM/FM/DAB+ RADIO INCLUDES BOTH OVER-THE-AIR AND ONLINE

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

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO AM/FM/DAB+ RADIO IN THE LAST WEEK

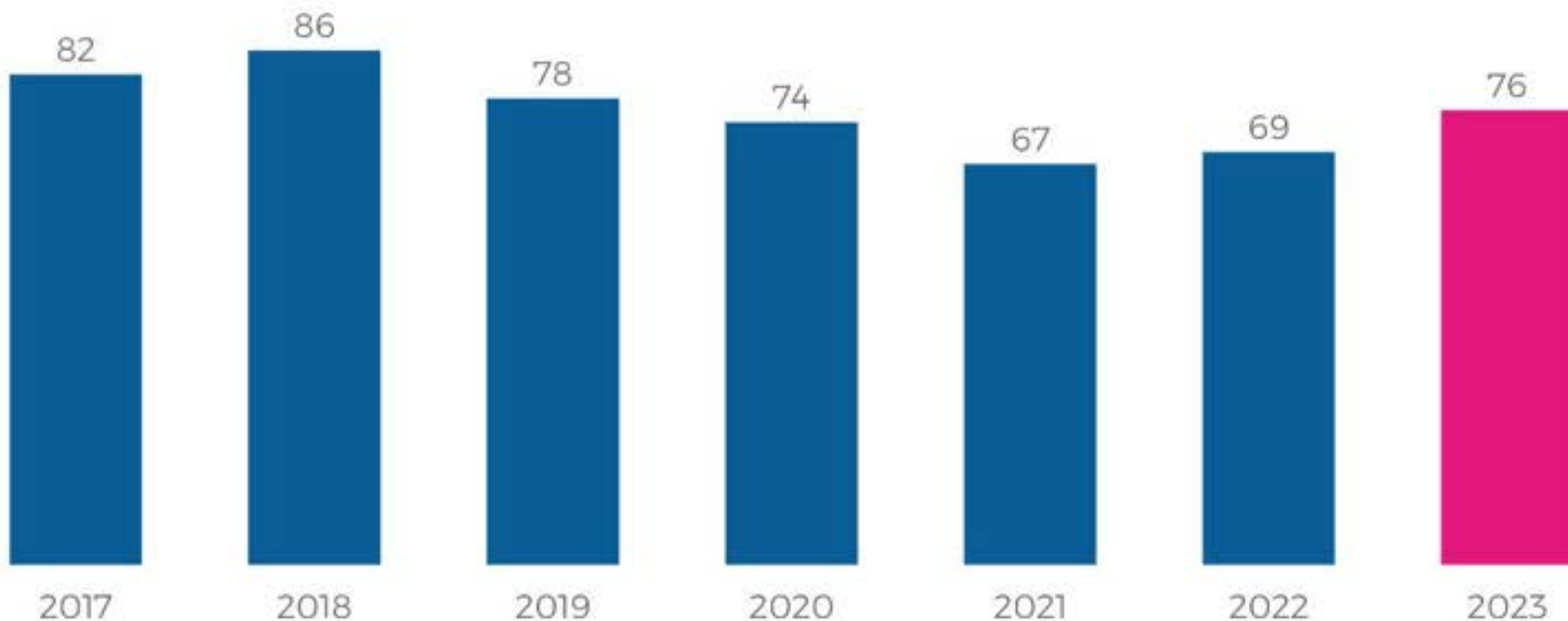


AM/FM/DAB+ RADIO INCLUDES BOTH OVER-THE-AIR AND ONLINE

# Listening to AM/FM/DAB+ Radio in the Last Week (Age 12-34)

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO AM/FM/DAB+ RADIO IN THE LAST WEEK



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



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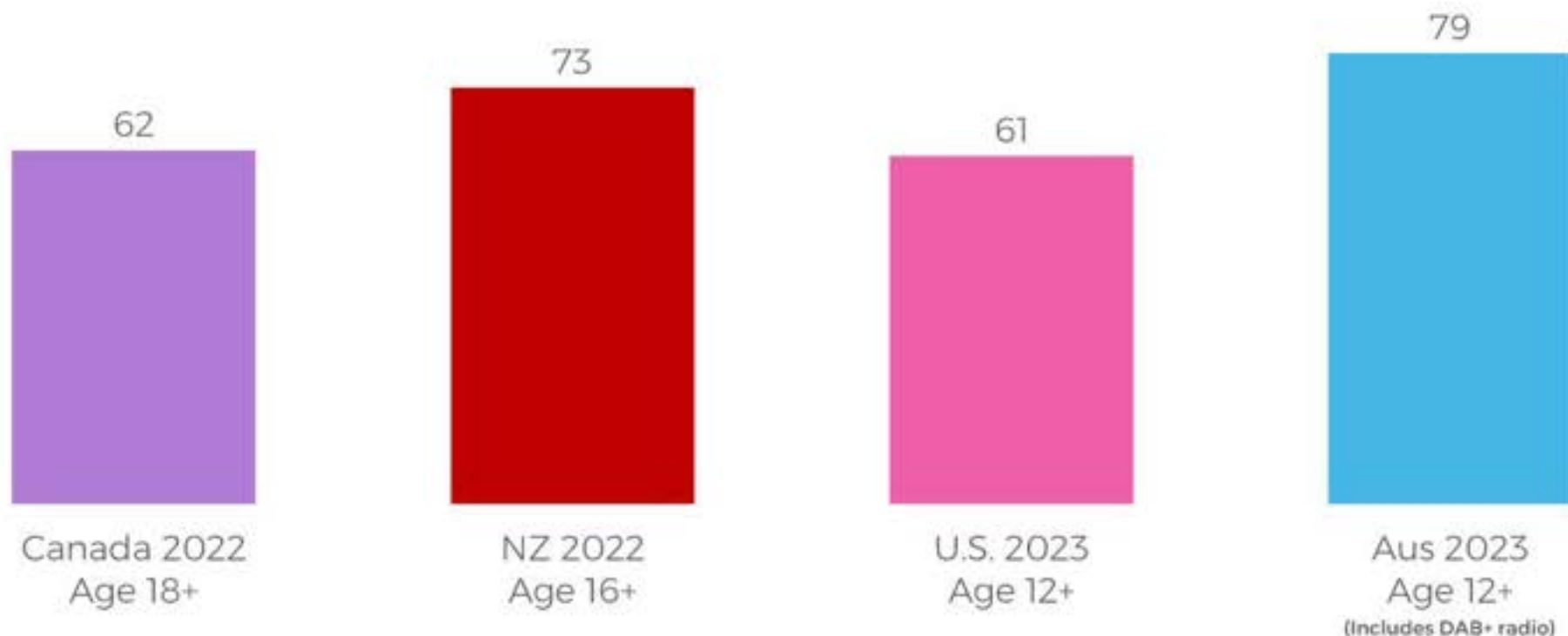
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# Listening to AM/FM/DAB+ Radio in the Last Week

TOTAL POPULATIONS

■ LISTENED TO AM/FM RADIO IN THE LAST WEEK

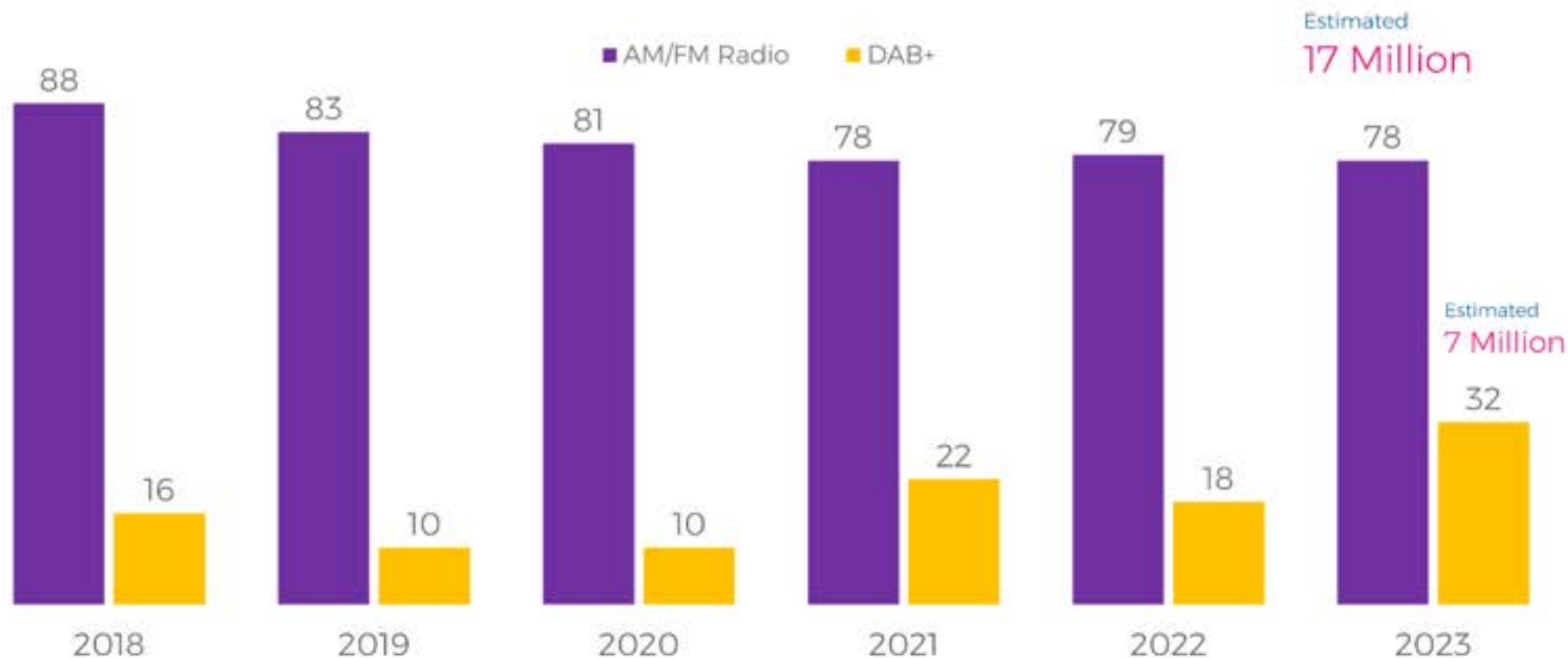


AM/FM/DAB+ RADIO INCLUDES BOTH OVER-THE-AIR AND ONLINE

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

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO AM/FM/DAB+ RADIO IN THE LAST WEEK



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

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

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO AM/FM/DAB+ RADIO IN THE LAST WEEK

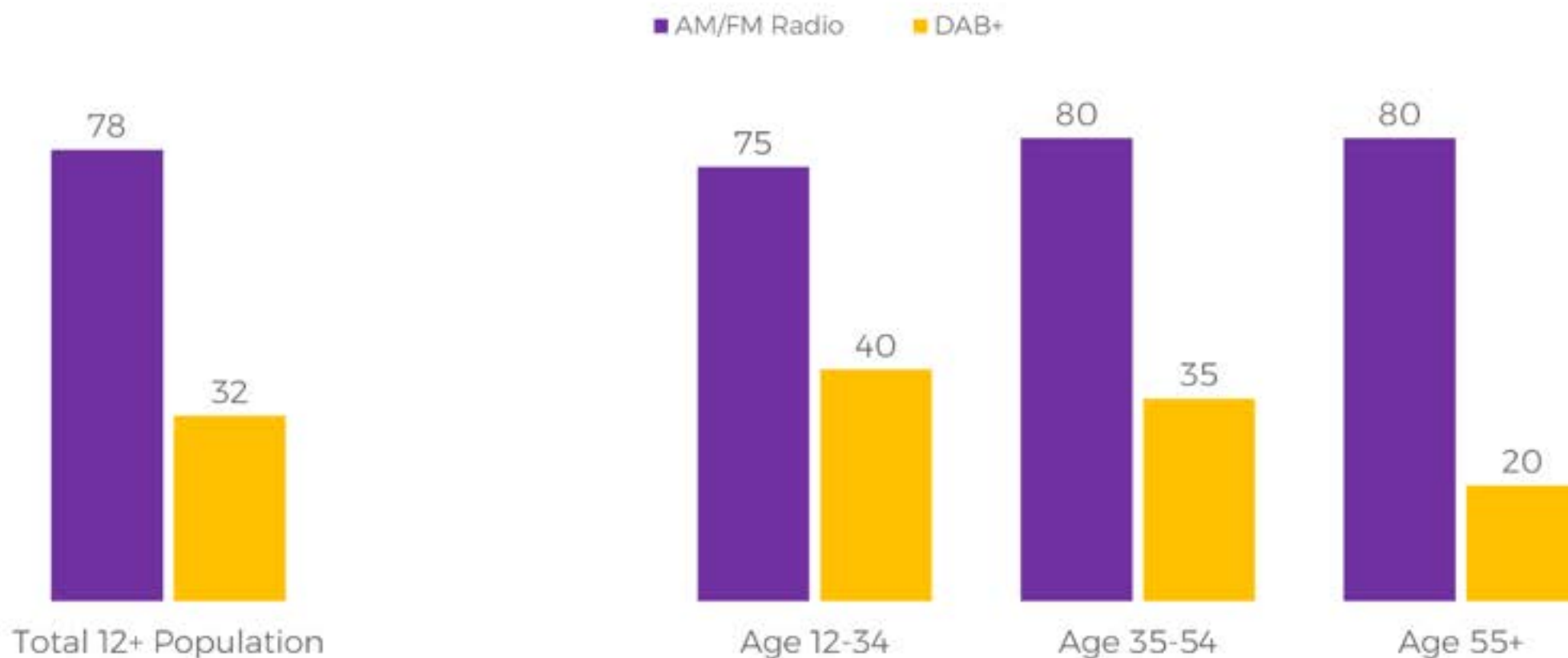


AM/FM/DAB+ RADIO INCLUDES BOTH OVER-THE-AIR AND ONLINE

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

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO AM/FM/DAB+ RADIO IN THE LAST WEEK



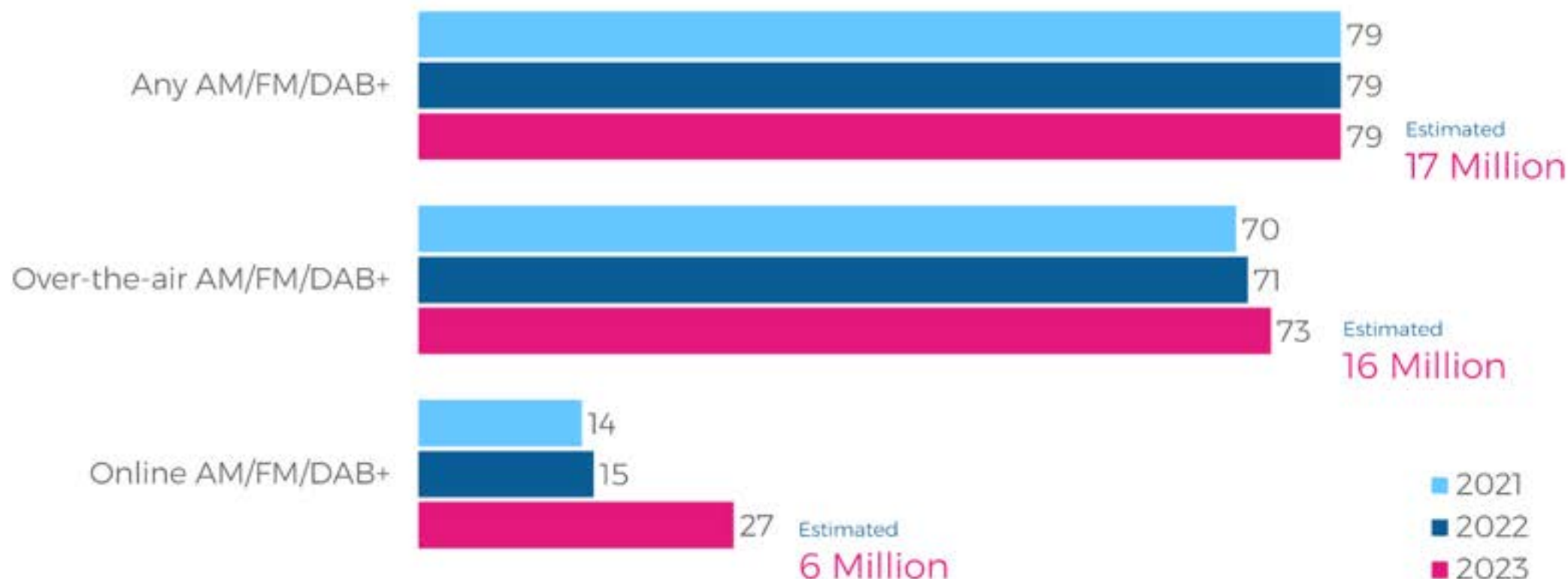
AM/FM/DAB+ RADIO INCLUDES BOTH OVER-THE-AIR AND ONLINE



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

TOTAL AUSTRALIAN POPULATION 12+

% LISTENING TO AM/FM/DAB+ RADIO STATIONS THROUGH SOURCE



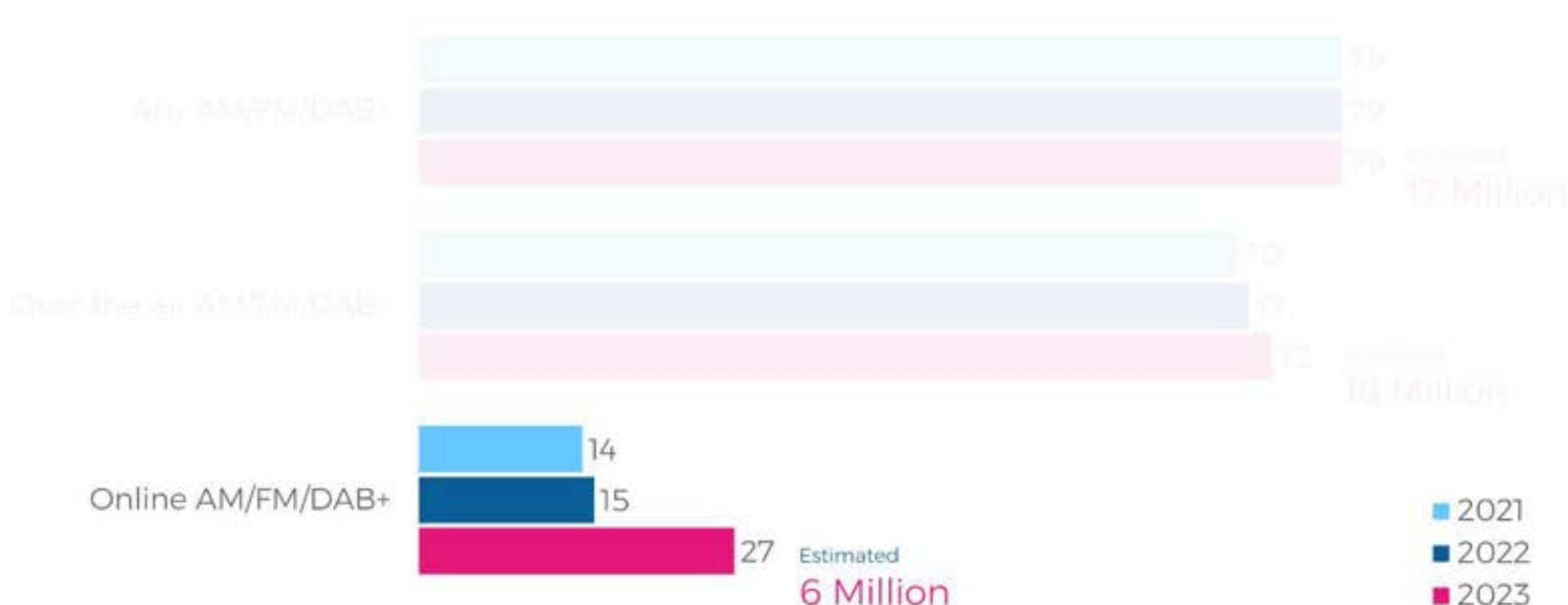
■ 2021  
■ 2022  
■ 2023

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

TOTAL AUSTRALIAN POPULATION 12+

■ LISTENING TO AM/FM/DAB+ RADIO STATIONS THROUGH SOURCE



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## Sources Weekly Online AM/FM/DAB+ Radio Listeners Use to Listen to Online Radio

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

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

Of the 27% of Australians 12+ who listened to AM/FM/DAB+ Radio in the last week, they did so via:



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

TOTAL POPULATIONS

% LISTENED TO ONLINE AM/FM/DAB+ RADIO IN THE LAST WEEK



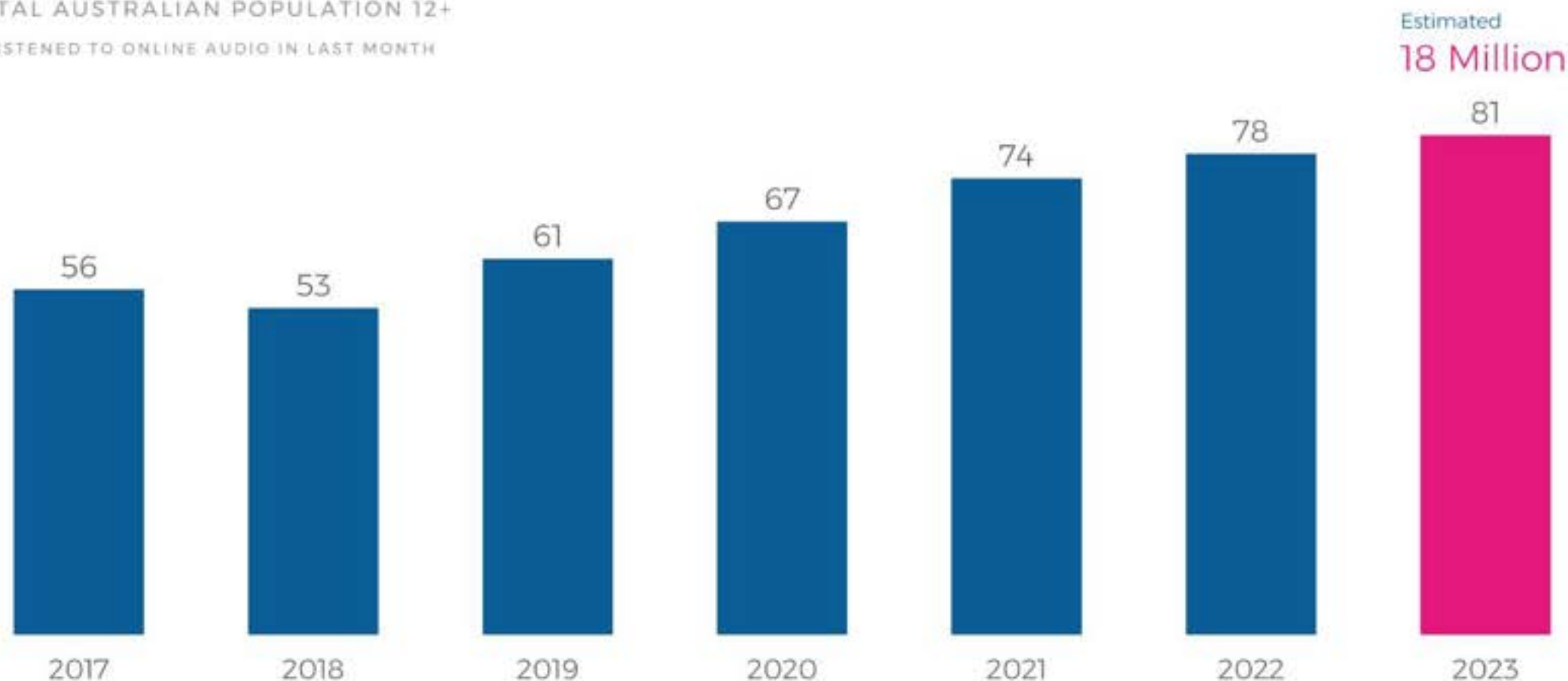
# Online Audio



# Monthly Online Audio Listening

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO ONLINE AUDIO IN LAST MONTH

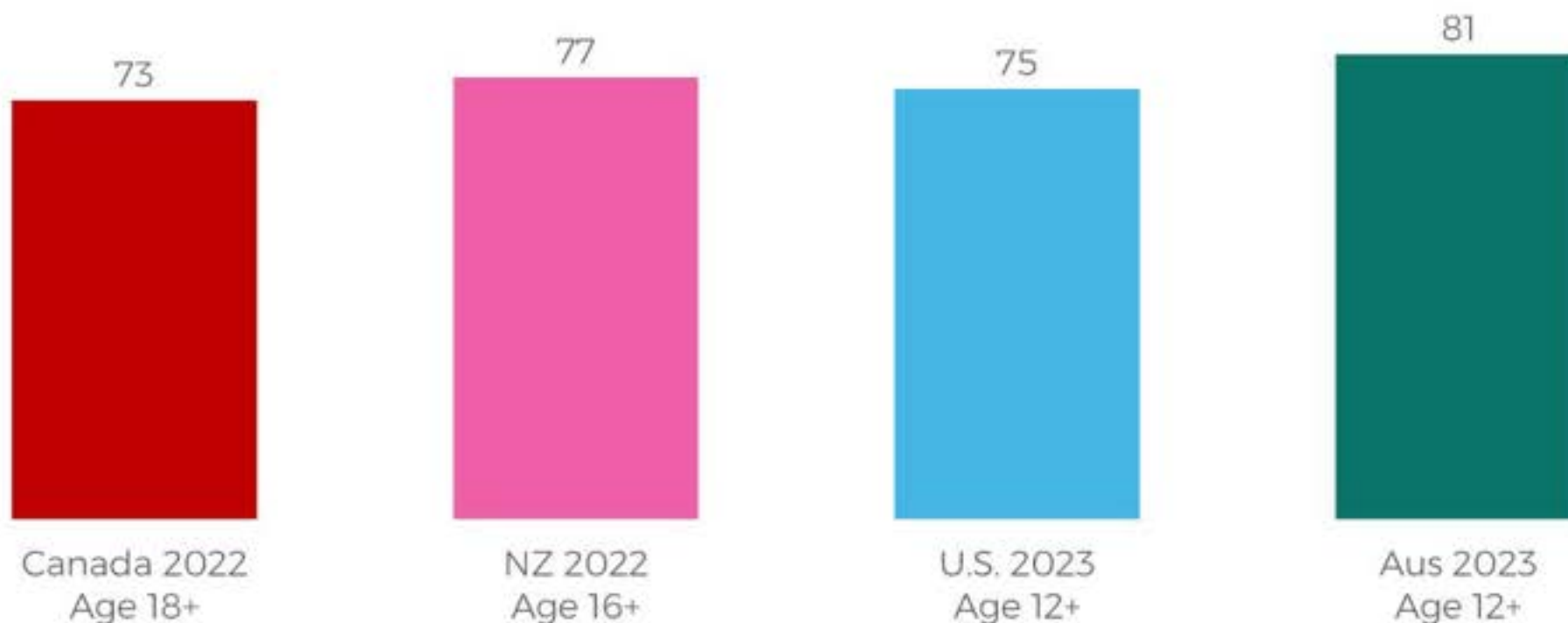


ONLINE AUDIO = LISTENING TO AM/FM/DAB+ RADIO STATIONS ONLINE AND/OR LISTENING TO AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET INCLUDING PODCASTS AND STREAMING SERVICES

# Monthly Online Audio Listening

TOTAL AUSTRALIAN POPULATION 12+

■ LISTENED TO ONLINE AUDIO IN LAST MONTH

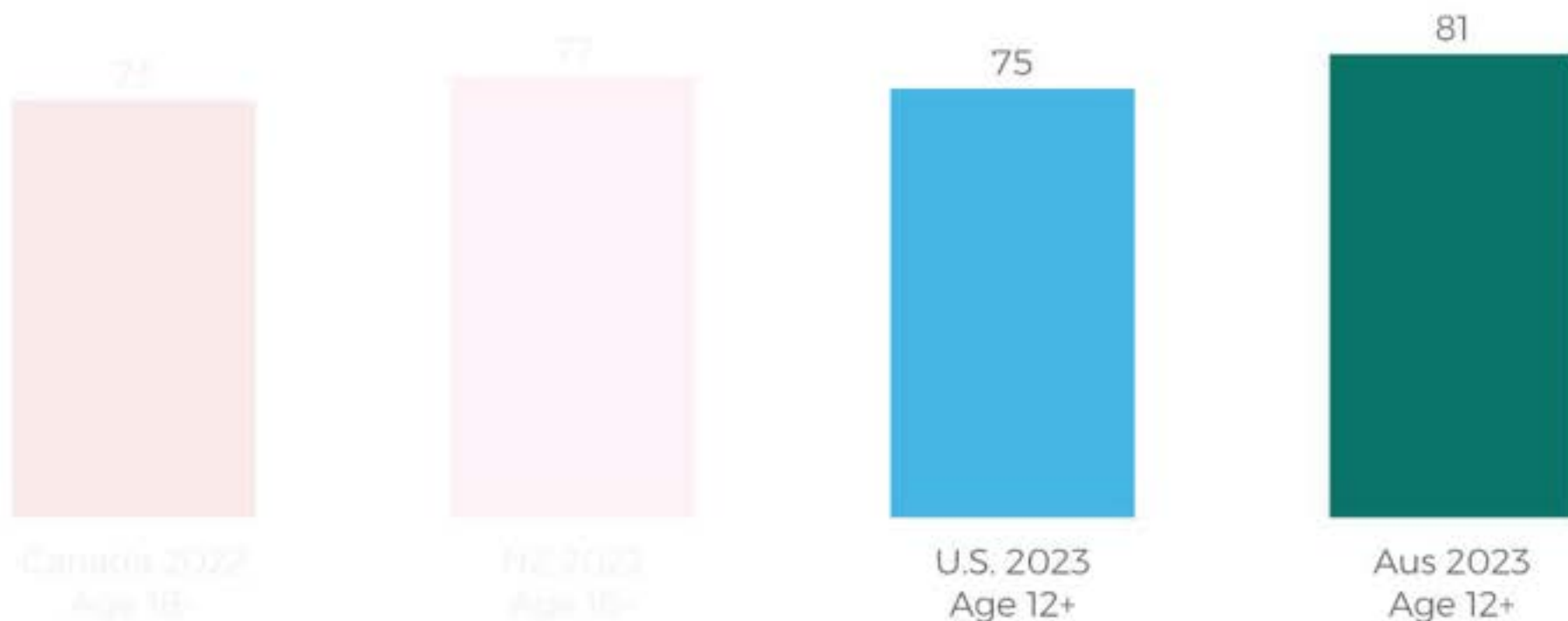


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# Monthly Online Audio Listening

TOTAL AUSTRALIAN POPULATION 12+

■ LISTENED TO ONLINE AUDIO IN LAST MONTH



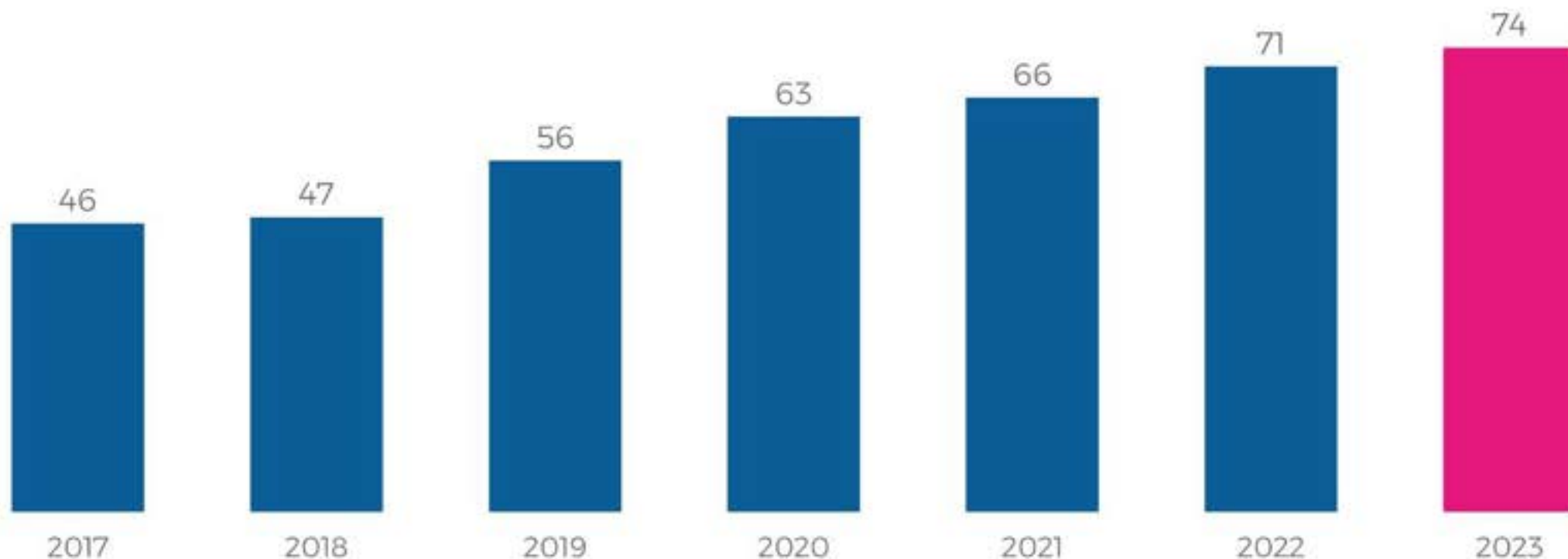
ONLINE AUDIO = LISTENING TO AM/FM/DAB+ RADIO STATIONS ONLINE AND/OR LISTENING TO AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET INCLUDING PODCASTS AND STREAMING SERVICES

# Weekly Online Audio Listening

TOTAL AUSTRALIAN POPULATION 12+

■ LISTENED TO ONLINE AUDIO IN LAST WEEK

Estimated  
**16 Million**



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

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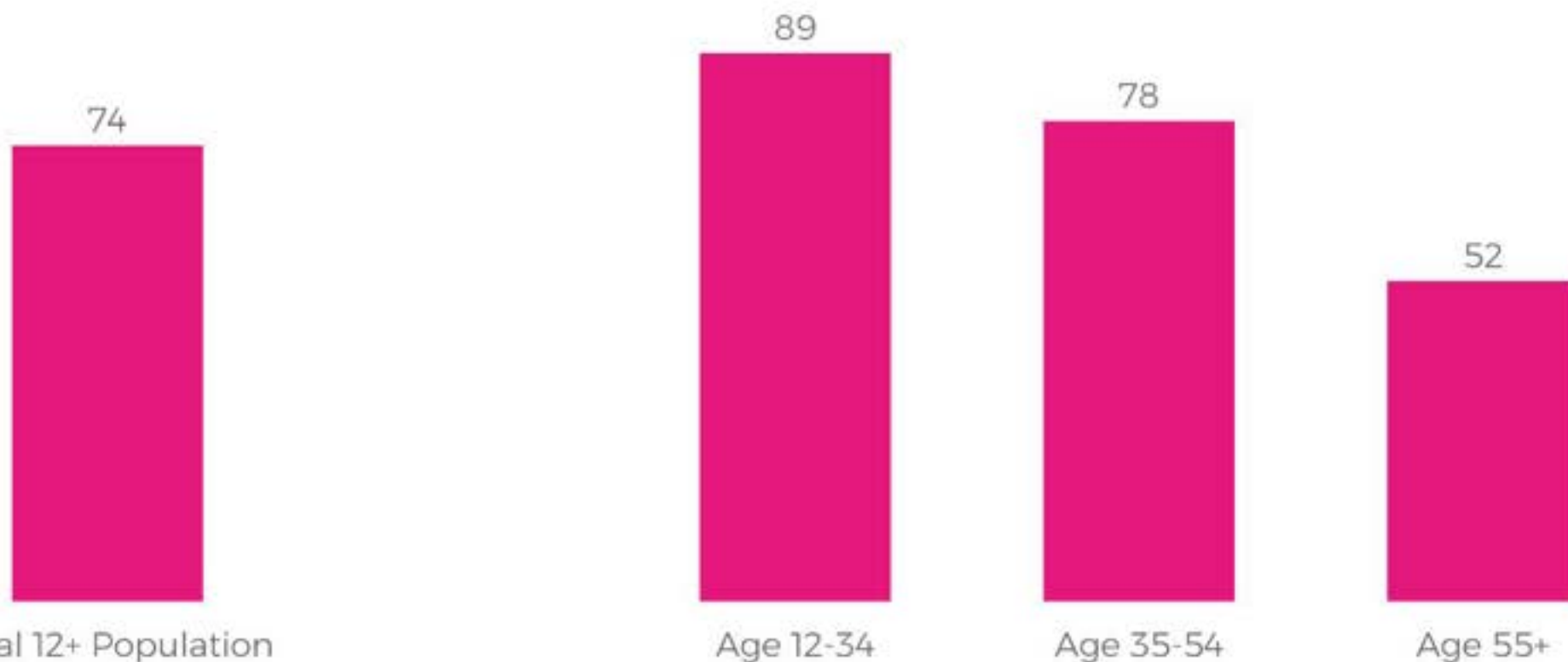


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## Weekly Online Audio Listening

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

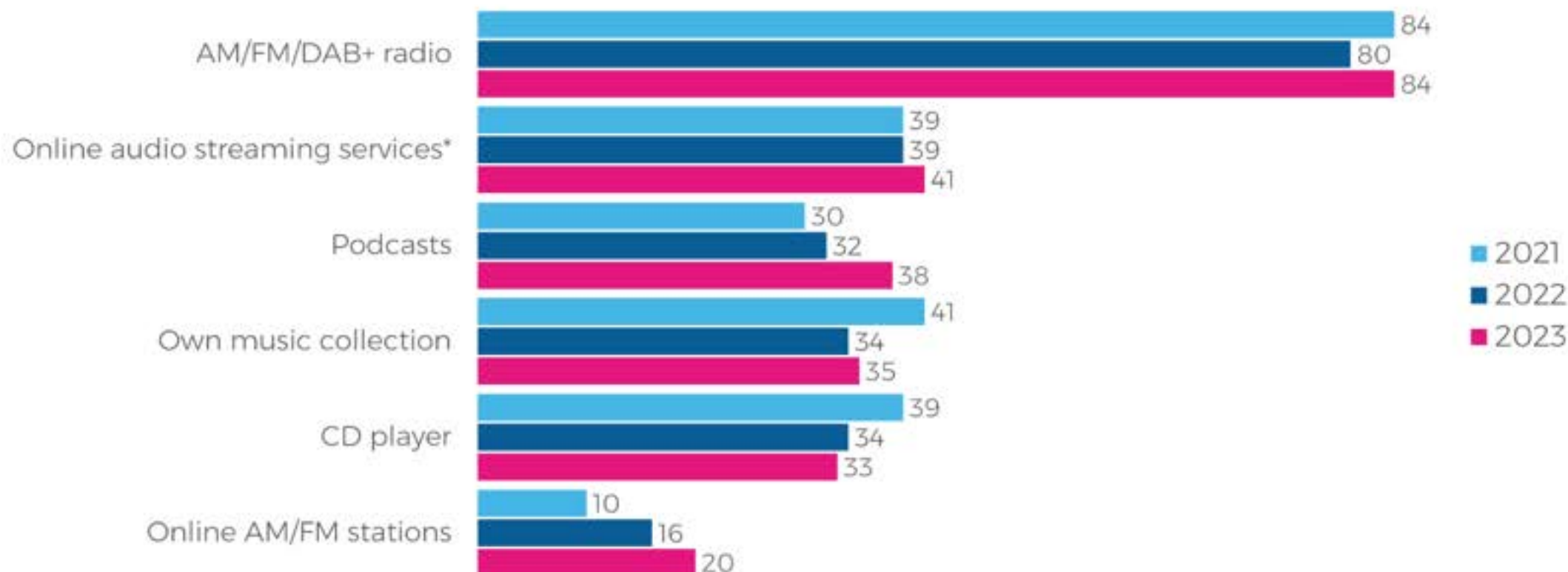


# In-Car Media

# 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 MUSIC, OR APPLE MUSIC

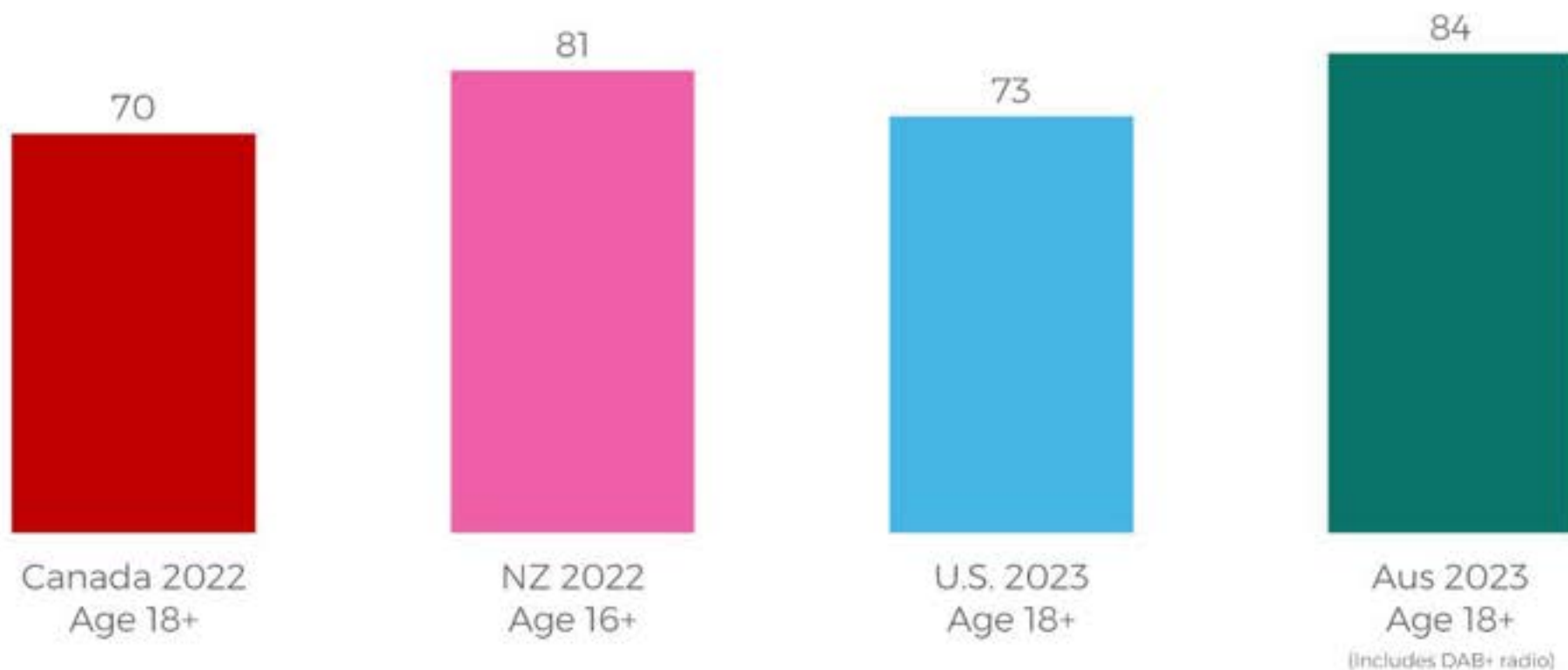
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# AM/FM/DAB+ Radio Usage in Car

BASE: HAVE DRIVEN/RIDDEN IN CAR IN LAST MONTH

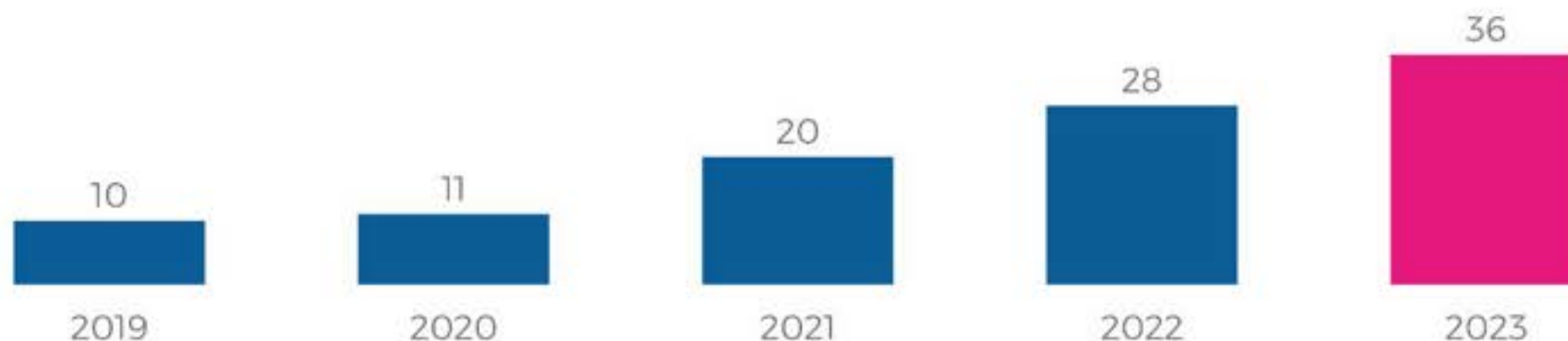
■ EVER USE AM/FM/DAB+ RADIO IN CAR



# Have Apple CarPlay or Android Auto in Primary Vehicle

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

% HAVE APPLE CARPLAY OR ANDROID AUTO IN PRIMARY VEHICLE



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# Have Apple CarPlay or Android Auto in Primary Vehicle

BASE: HAVE DRIVEN/RIDDEN IN CAR IN LAST MONTH

■ HAVE APPLE CARPLAY OR ANDROID AUTO IN PRIMARY VEHICLE



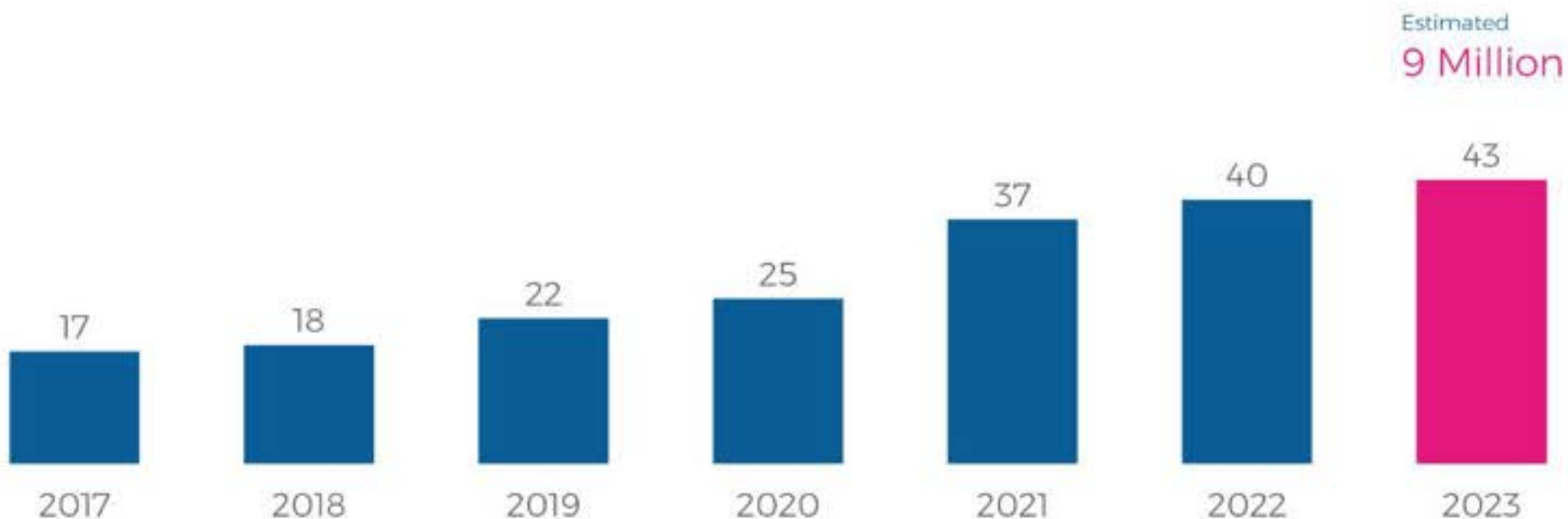


# Podcasting

# Monthly Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+

■ LISTENED TO A PODCAST IN LAST MONTH



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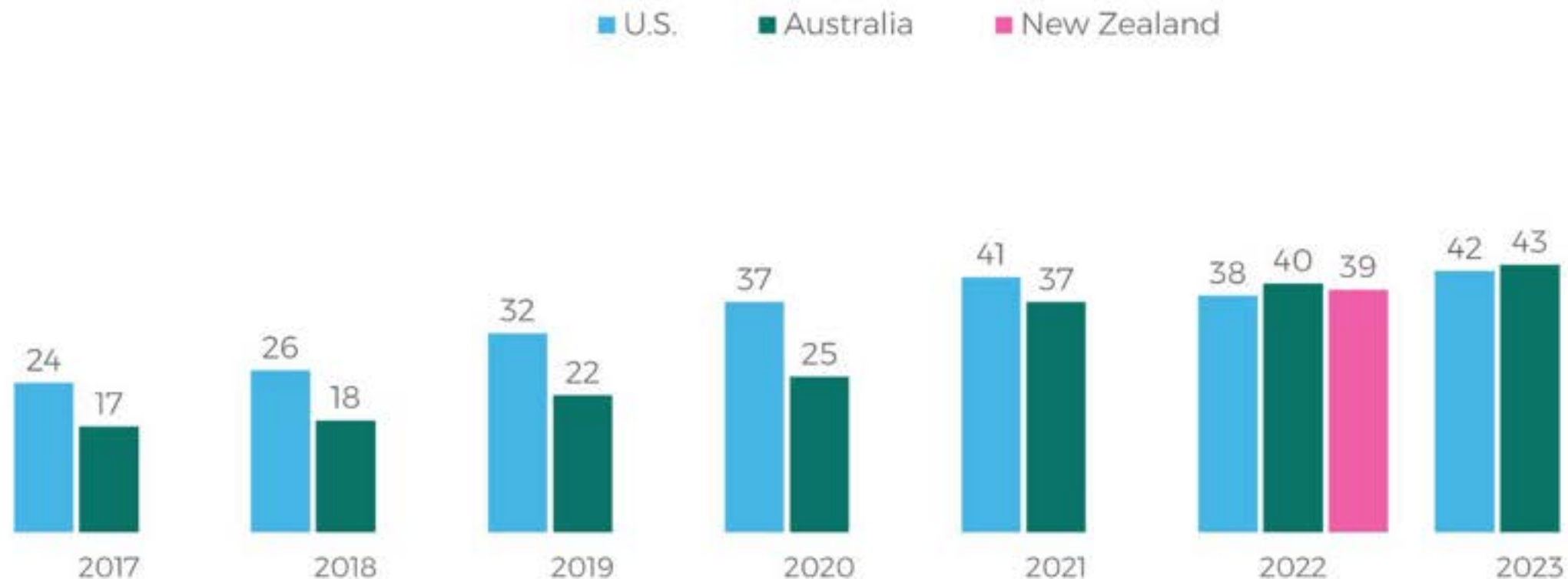


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# Monthly Podcast Listening

TOTAL POPULATIONS

■ LISTENED TO A PODCAST IN LAST MONTH



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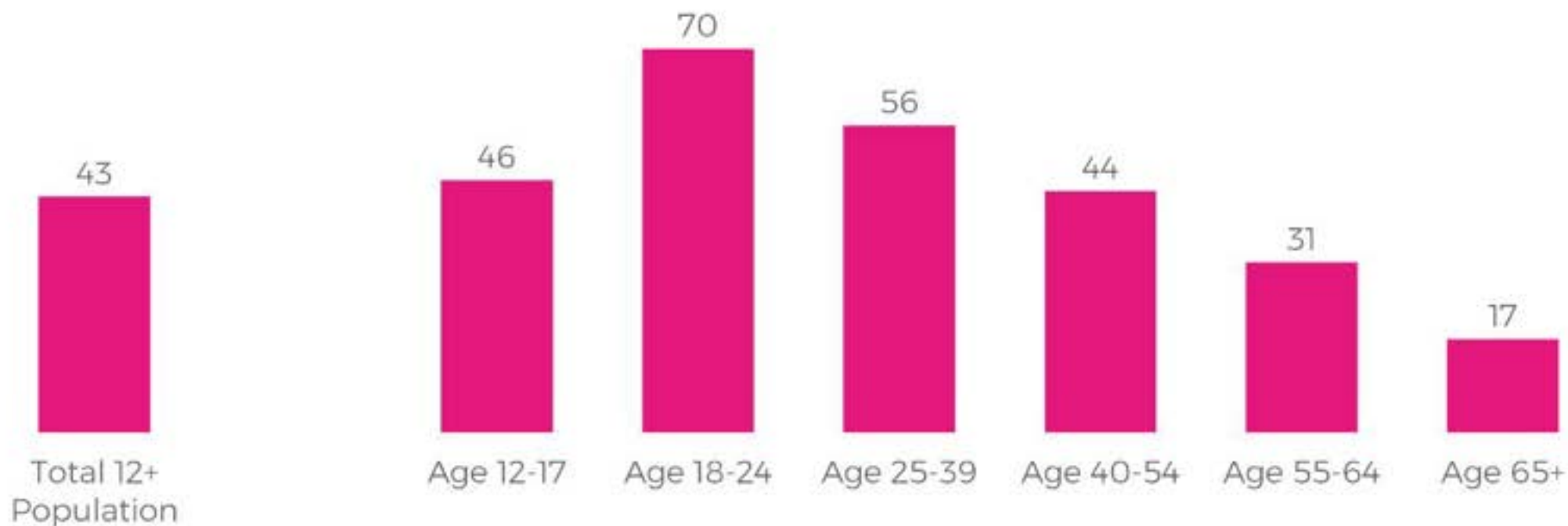


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# Monthly Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+

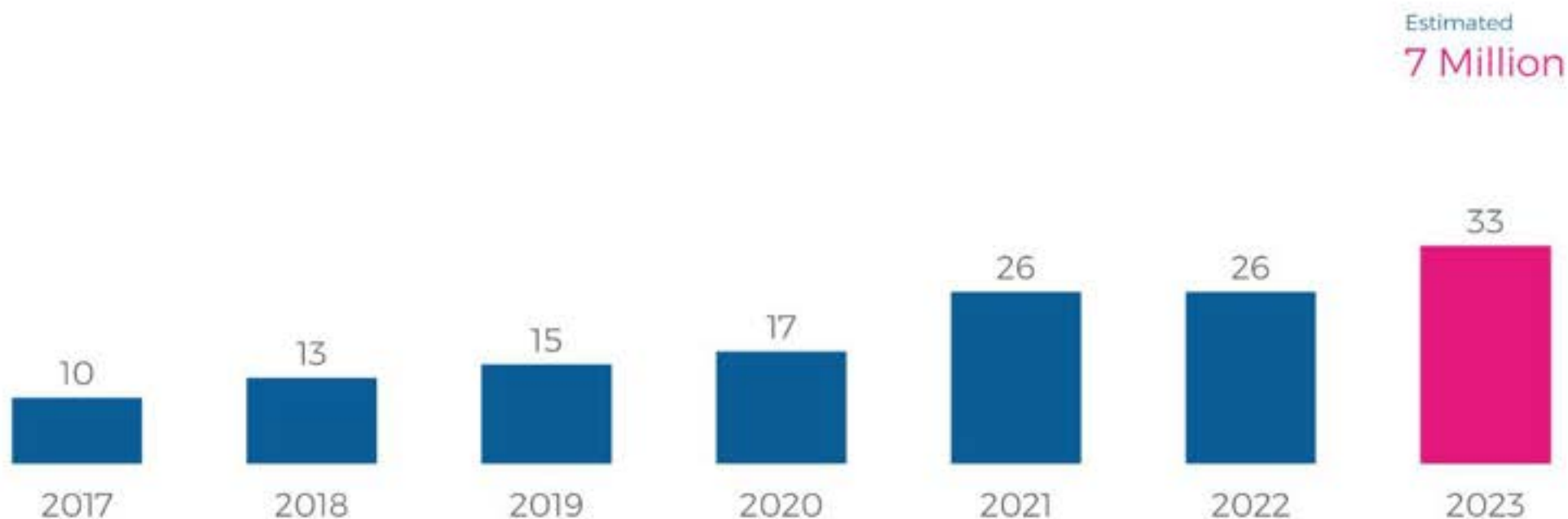
■ LISTENED TO A PODCAST IN LAST MONTH



# Weekly Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+

■ LISTENED TO A PODCAST IN LAST WEEK



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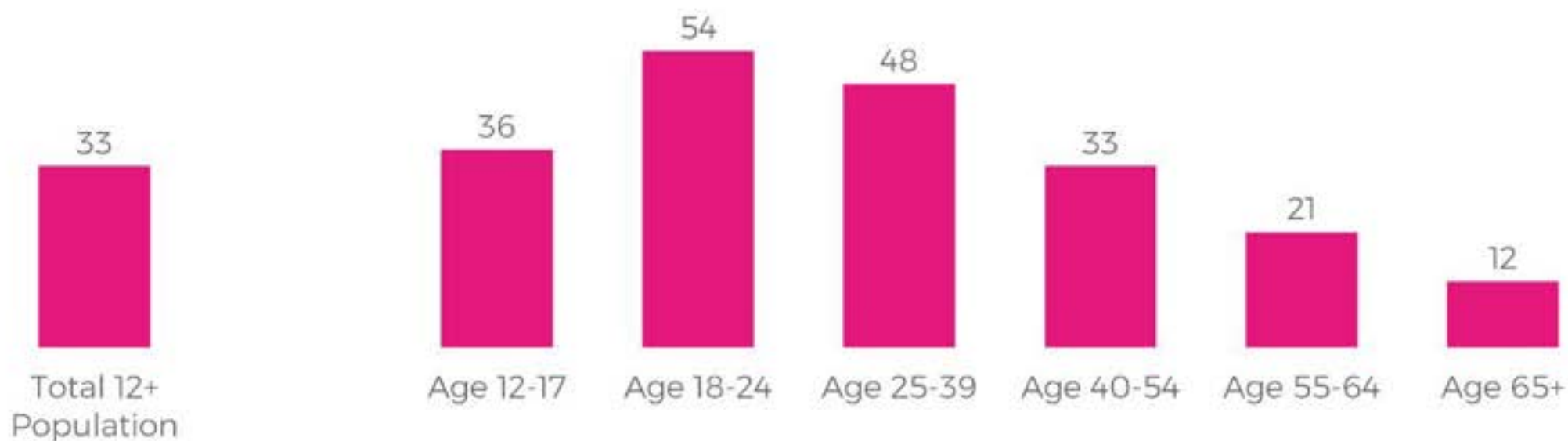
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## Weekly Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+

■ LISTENED TO A PODCAST IN LAST WEEK



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# Weekly Podcast Listening

TOTAL POPULATIONS

■ LISTENED TO A PODCAST IN LAST WEEK

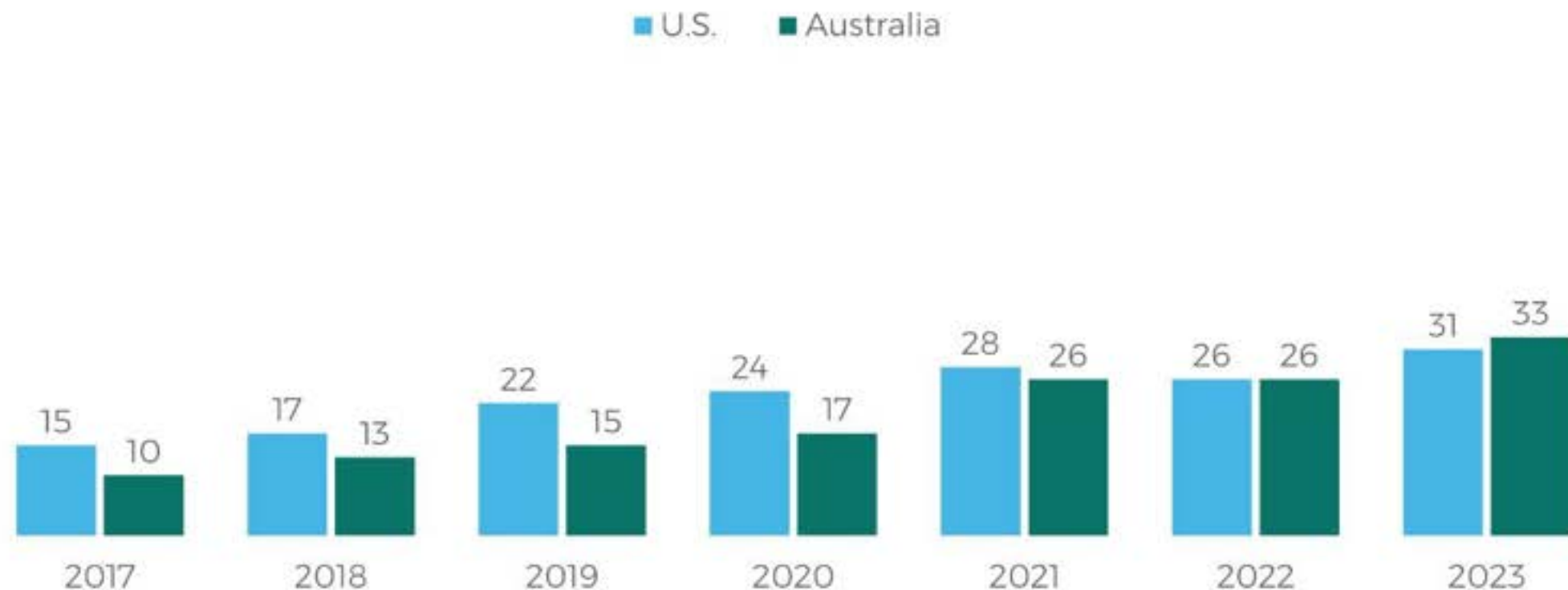


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# Weekly Podcast Listening

TOTAL POPULATIONS

■ LISTENED TO A PODCAST IN LAST WEEK



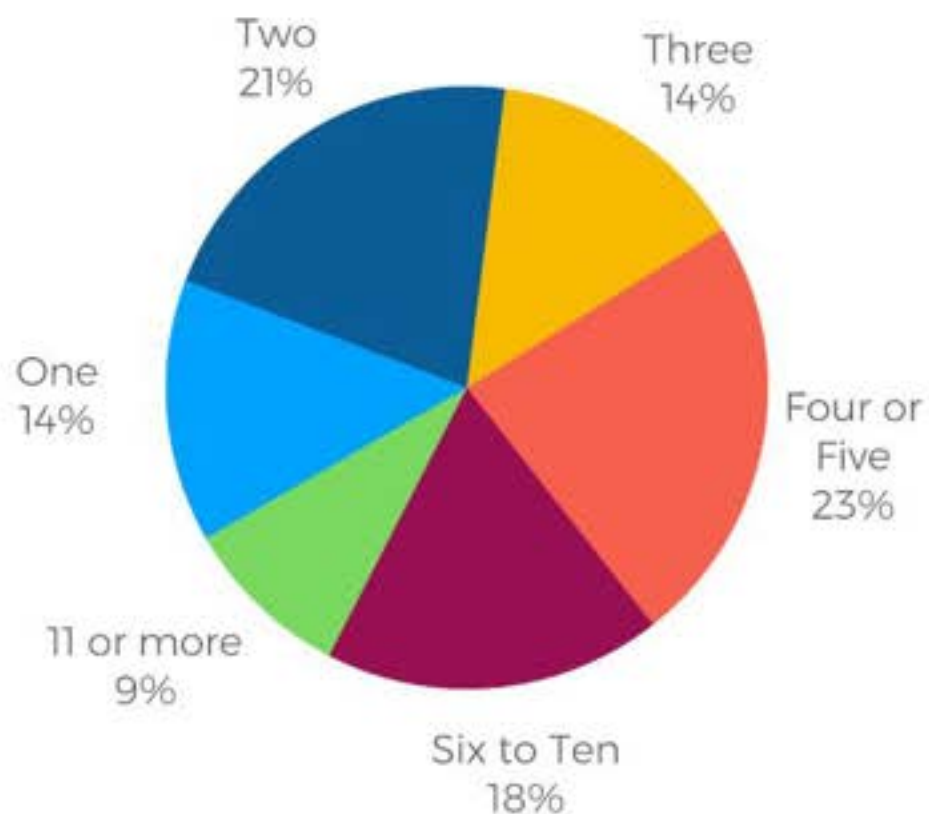
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# Number of Podcast Episodes Listened to in Last Week

BASE: AUSTRALIANS AGE 12+ AND LISTENED TO PODCAST IN LAST WEEK; 33%



Australian weekly podcast listeners averaged

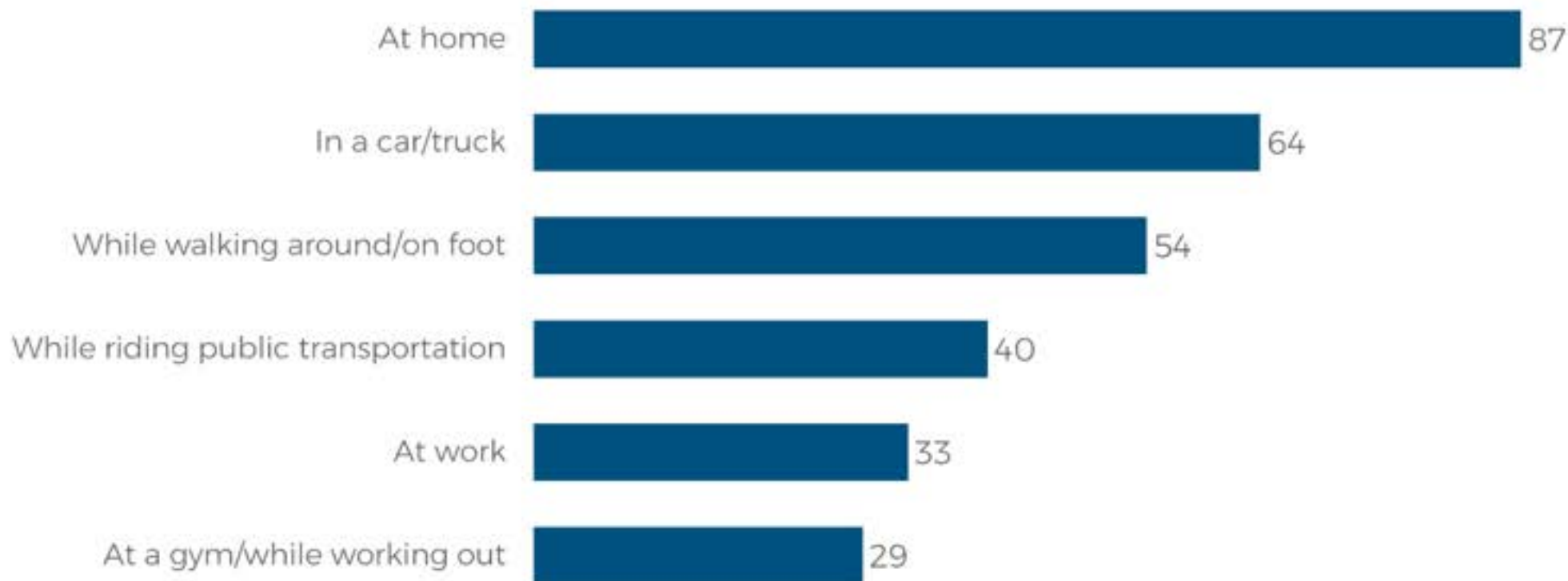
**five episodes**

in the last week

## Podcast Listening Locations

BASE: AUSTRALIANS AGE 12+ AND LISTENED TO PODCAST IN LAST MONTH; 43%

% LISTENED TO A PODCAST IN LOCATION

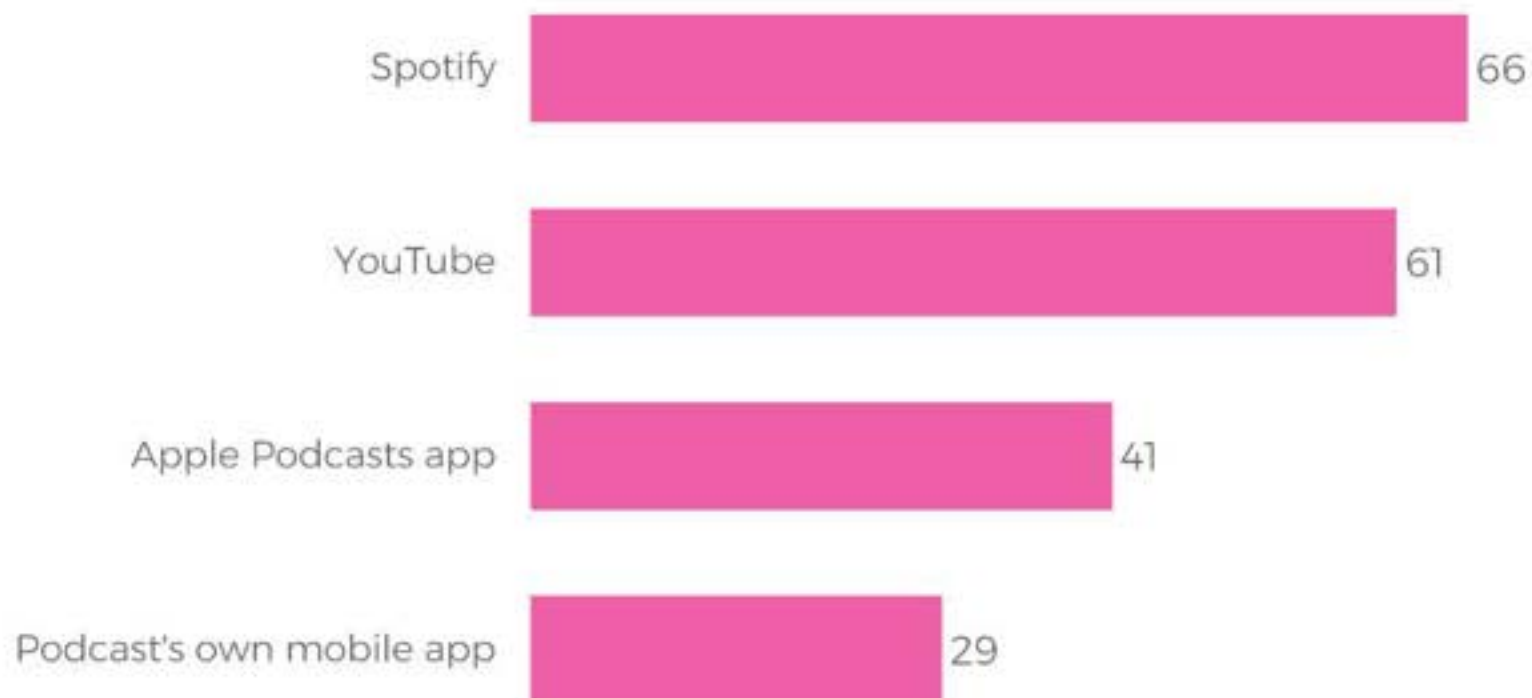


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## Services Used to Listen to Podcasts

BASE: AUSTRALIANS AGE 12+ AND LISTENED TO PODCAST IN LAST MONTH; 43%

% CURRENTLY EVER LISTEN TO PODCASTS ON SERVICE



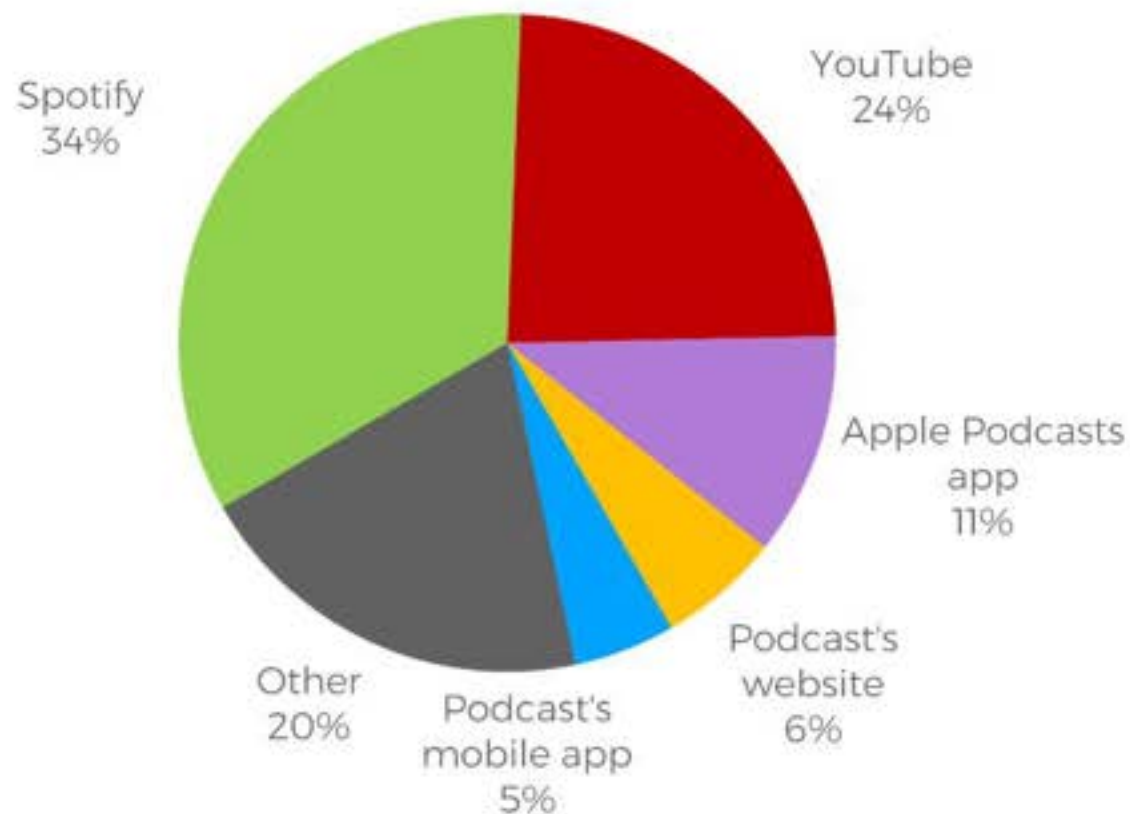
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## Service Used Most Often to Listen to Podcasts

BASE: AUSTRALIANS AGE 12+ AND LISTENED TO PODCAST IN LAST MONTH; 43%



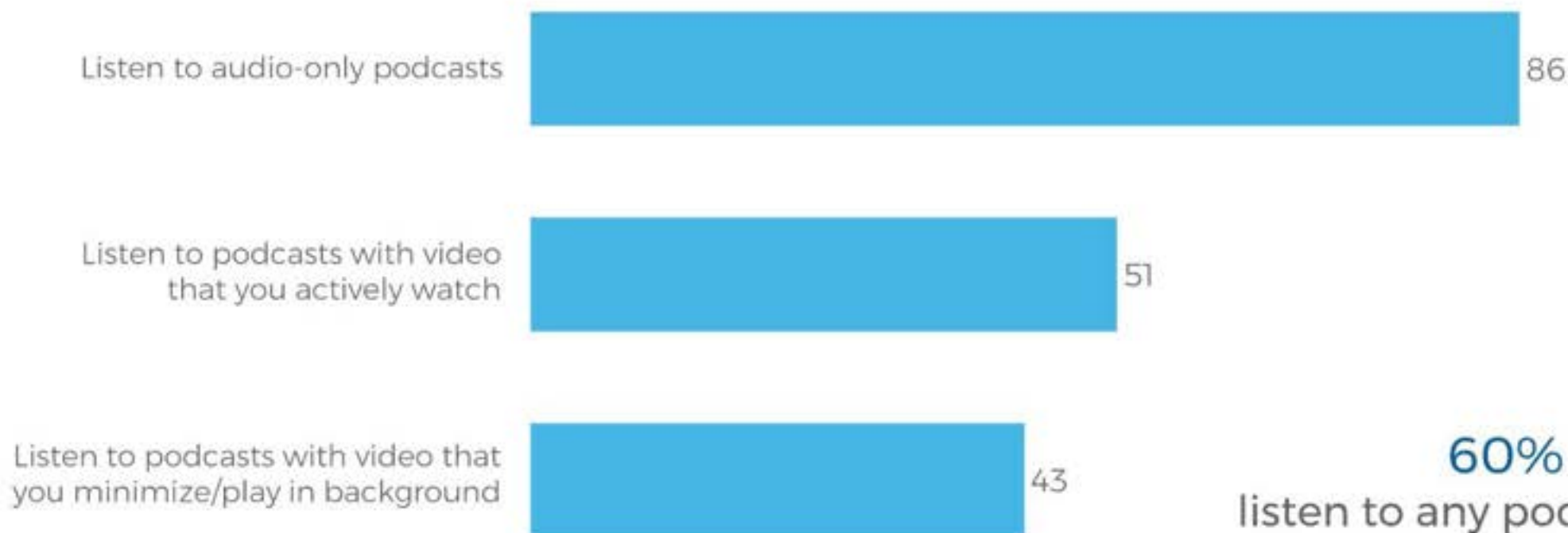
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## Listening to Podcasts with a Video Component

BASE: AUSTRALIANS AGE 12+ AND LISTENED TO PODCAST IN LAST MONTH; 43%

% SAYING THEY CURRENTLY EVER LISTEN TO TYPE OF PODCAST

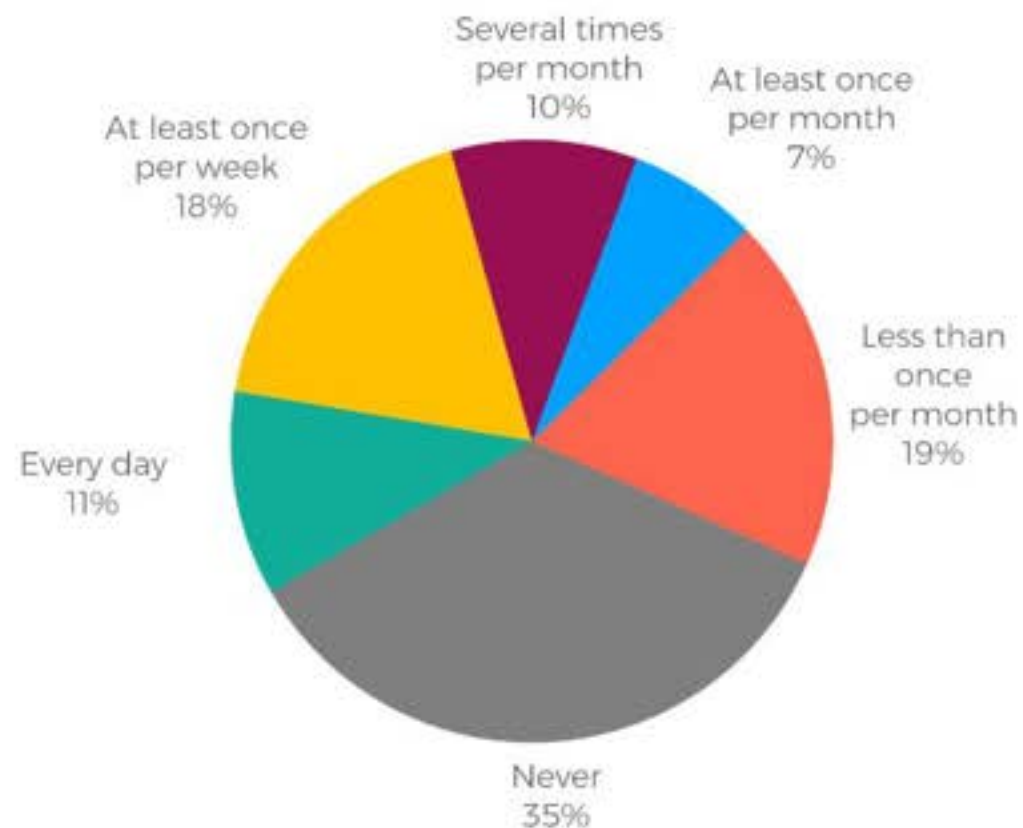


**60%**  
listen to any podcast with  
a video component

# Frequency of Listening to Podcasts

TOTAL AUSTRALIAN POPULATION 12+

*"How often do you listen to podcasts?"*



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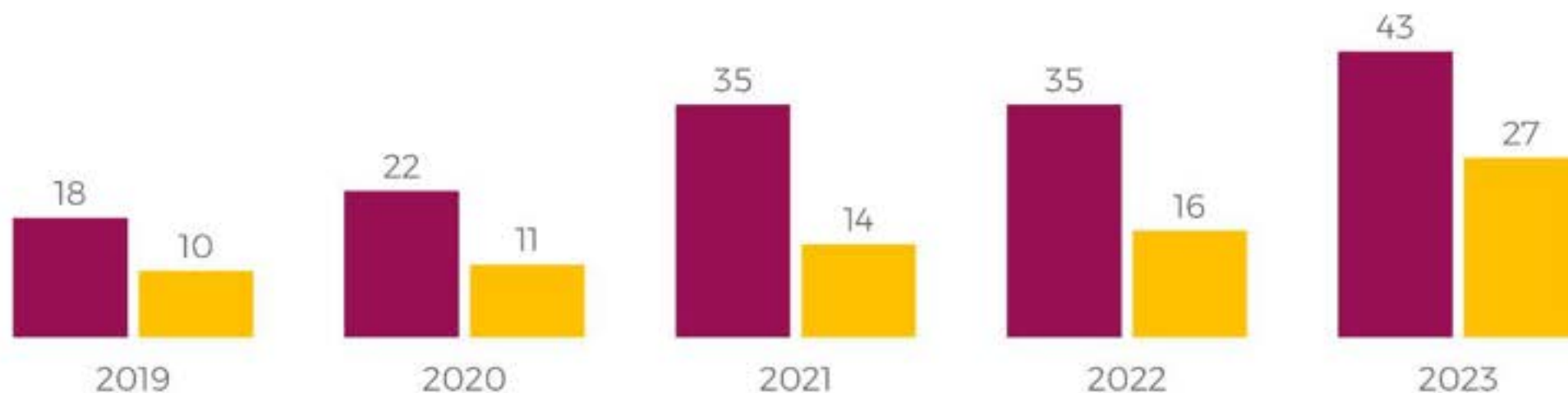
## Type of Podcast Listened to at Least Once a Month

TOTAL AUSTRALIAN POPULATION 12+

■ LISTENED TO TYPE OF PODCAST AT LEAST ONCE A MONTH

■ Podcasts with original content

■ Catch-up radio podcasts



# Online Audio Streaming Services

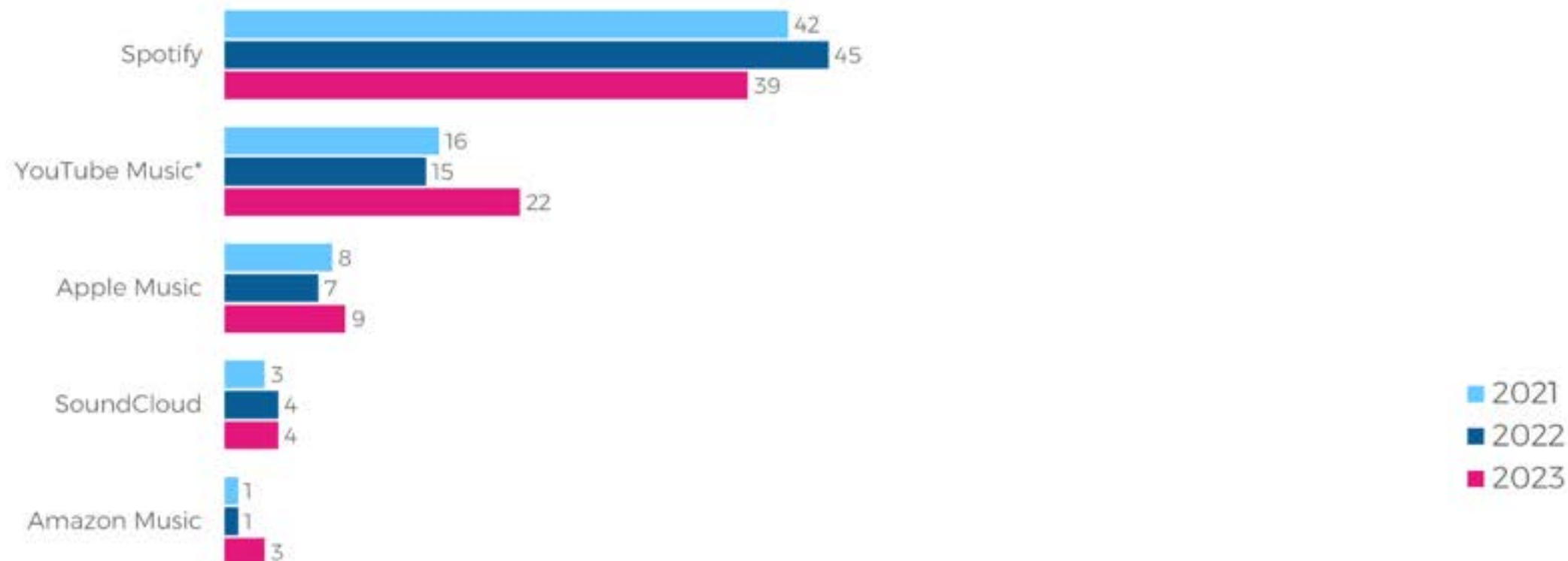
[www.edisonresearch.com](https://www.edisonresearch.com)



# Weekly Listening to Online Audio Streaming Services

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO ONLINE AUDIO STREAMING SERVICE IN LAST WEEK



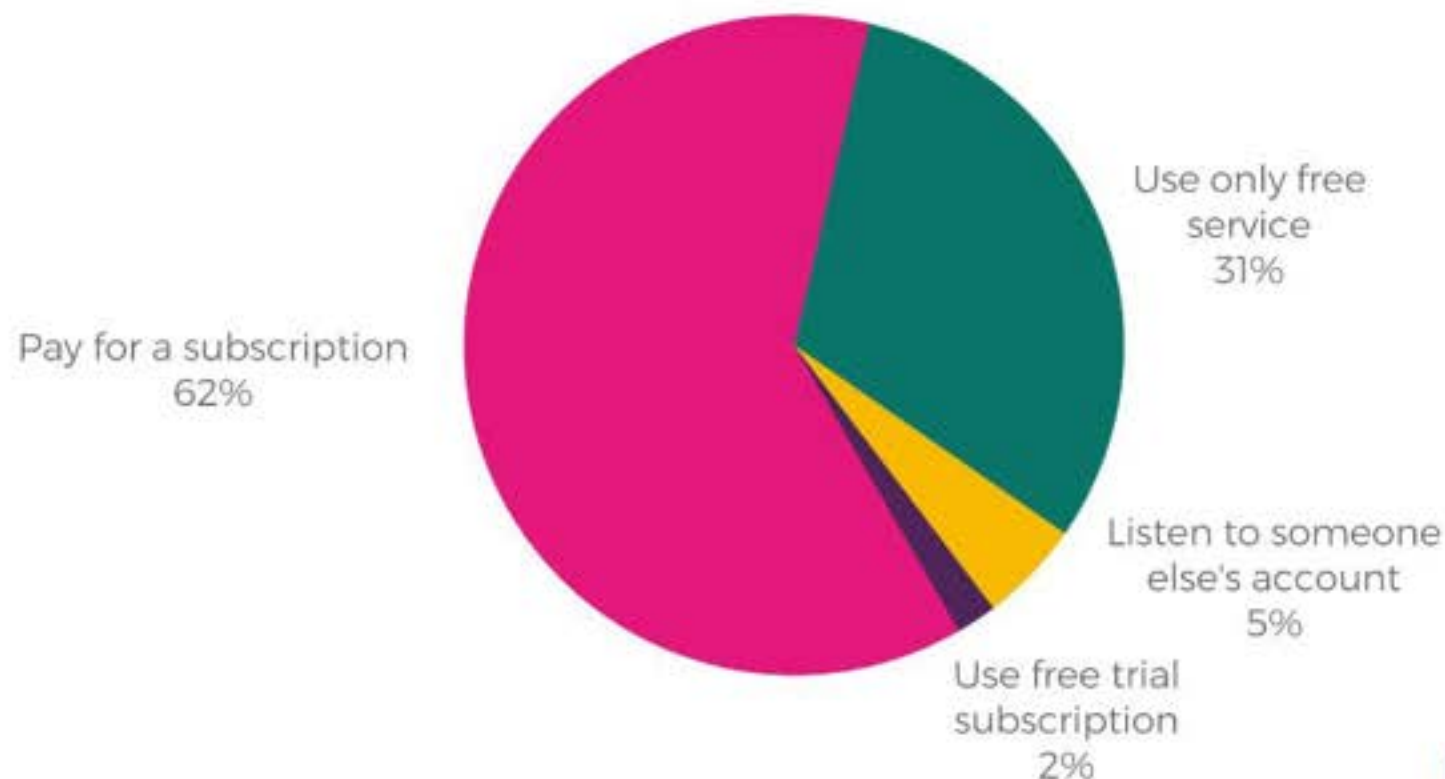
\*ASKED AS: "YOUTUBE MUSIC, THE STREAMING MUSIC SERVICE FROM YOUTUBE"

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## Free vs. Paid Subscriptions to Spotify

BASE: AUSTRALIANS AGE 12+ AND LISTENED TO SPOTIFY IN LAST WEEK; 39%



3 in 10 weekly Spotify listeners can be reached by advertising on Spotify

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# Weekly Listening to Ad-Supported Audio

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO AUDIO SOURCE IN THE LAST WEEK



# Weekly Listening to Ad-Supported Audio

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO AUDIO SOURCE IN THE LAST WEEK

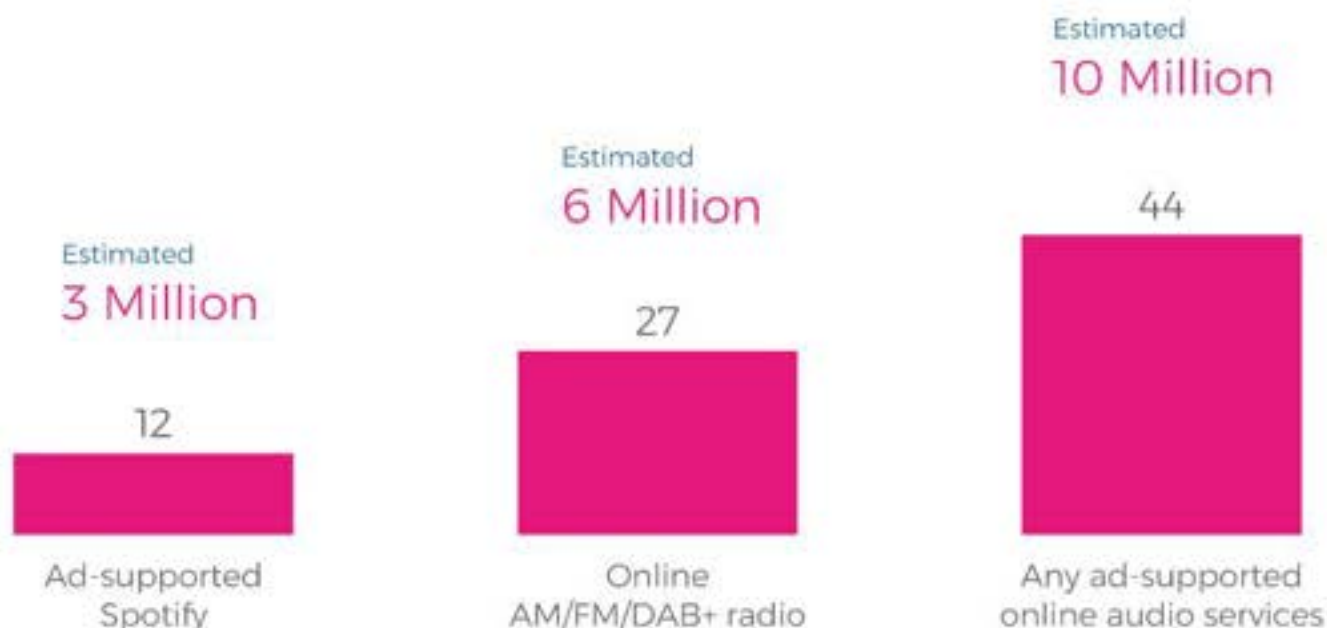


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# Weekly Listening to Ad-Supported Audio

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO AUDIO SOURCE IN THE LAST WEEK

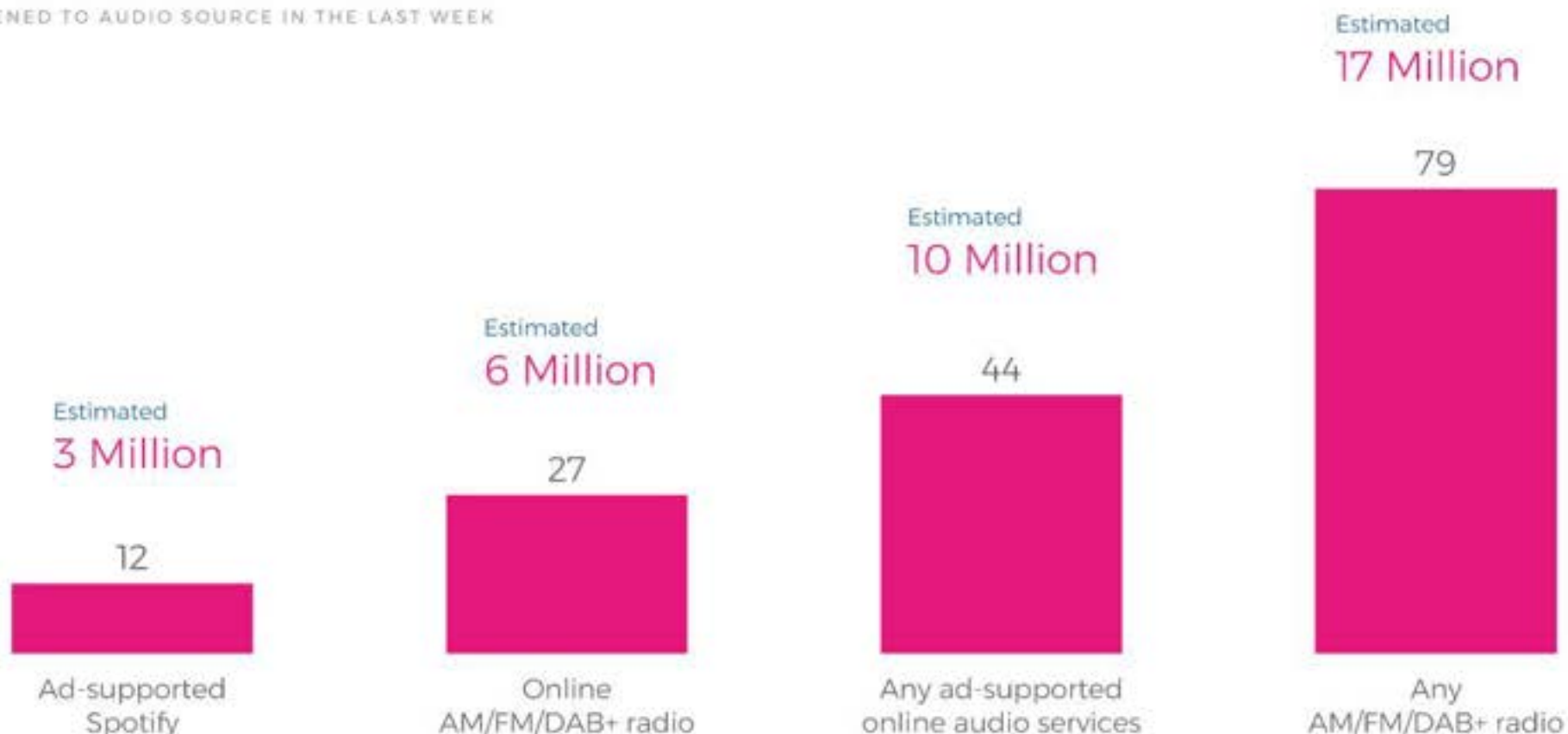


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# Weekly Listening to Ad-Supported Audio

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO AUDIO SOURCE IN THE LAST WEEK

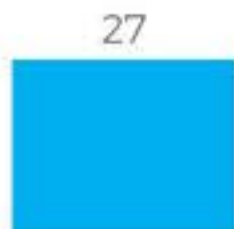


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# TikTok Weekly Usage

TOTAL AUSTRALIAN POPULATION 12+

% USED TIKTOK IN THE LAST WEEK



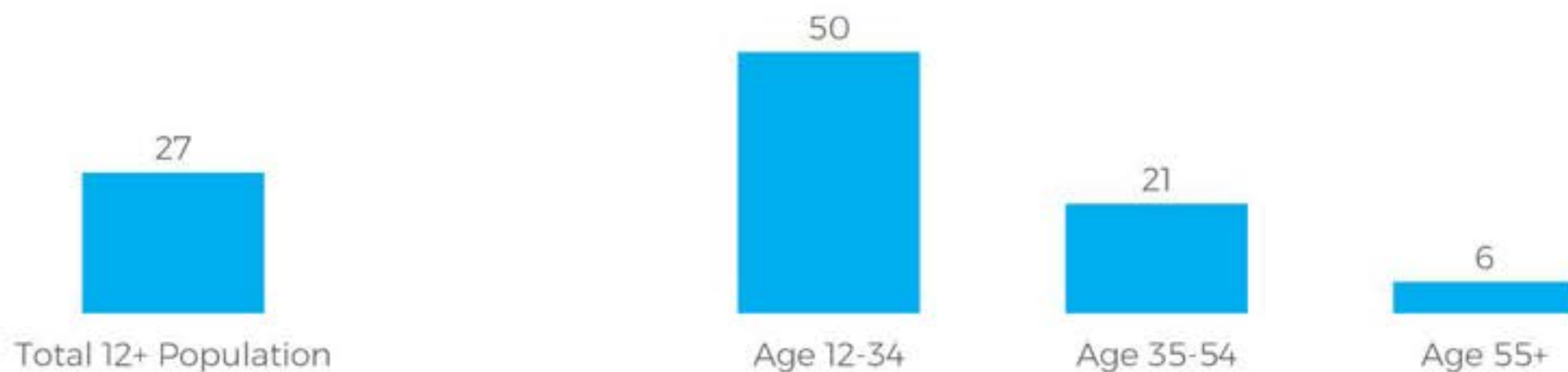
Total 12+ Population



## TikTok Weekly Usage

TOTAL AUSTRALIAN POPULATION 12+

% USED TIKTOK IN THE LAST WEEK



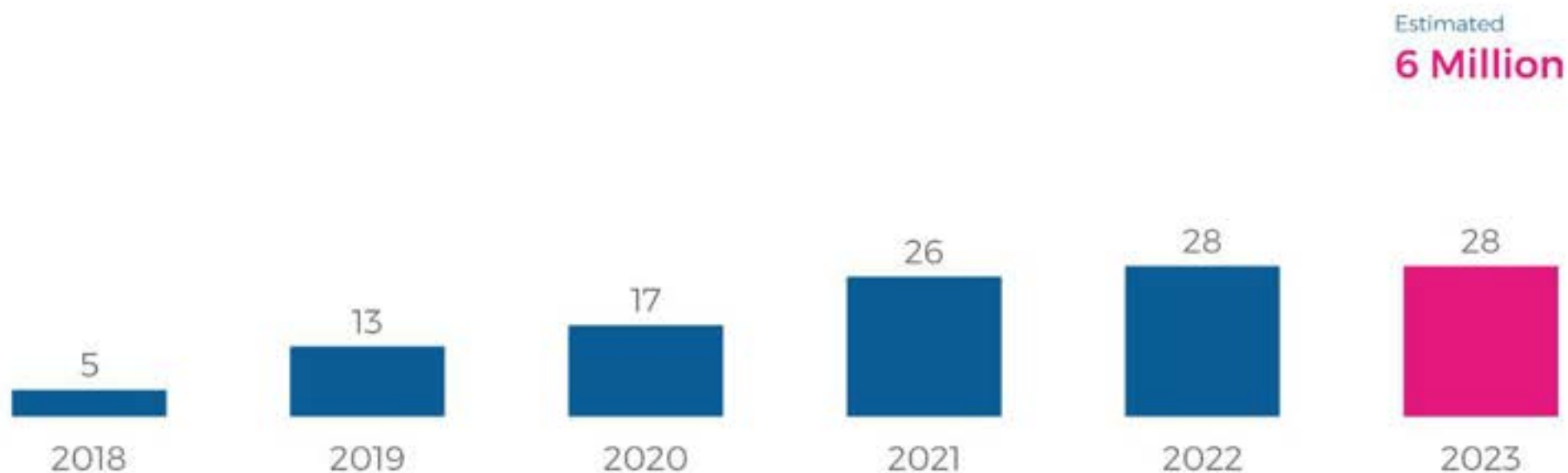
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# Smart Speakers

# Smart Speaker Ownership

TOTAL AUSTRALIAN POPULATION 12+

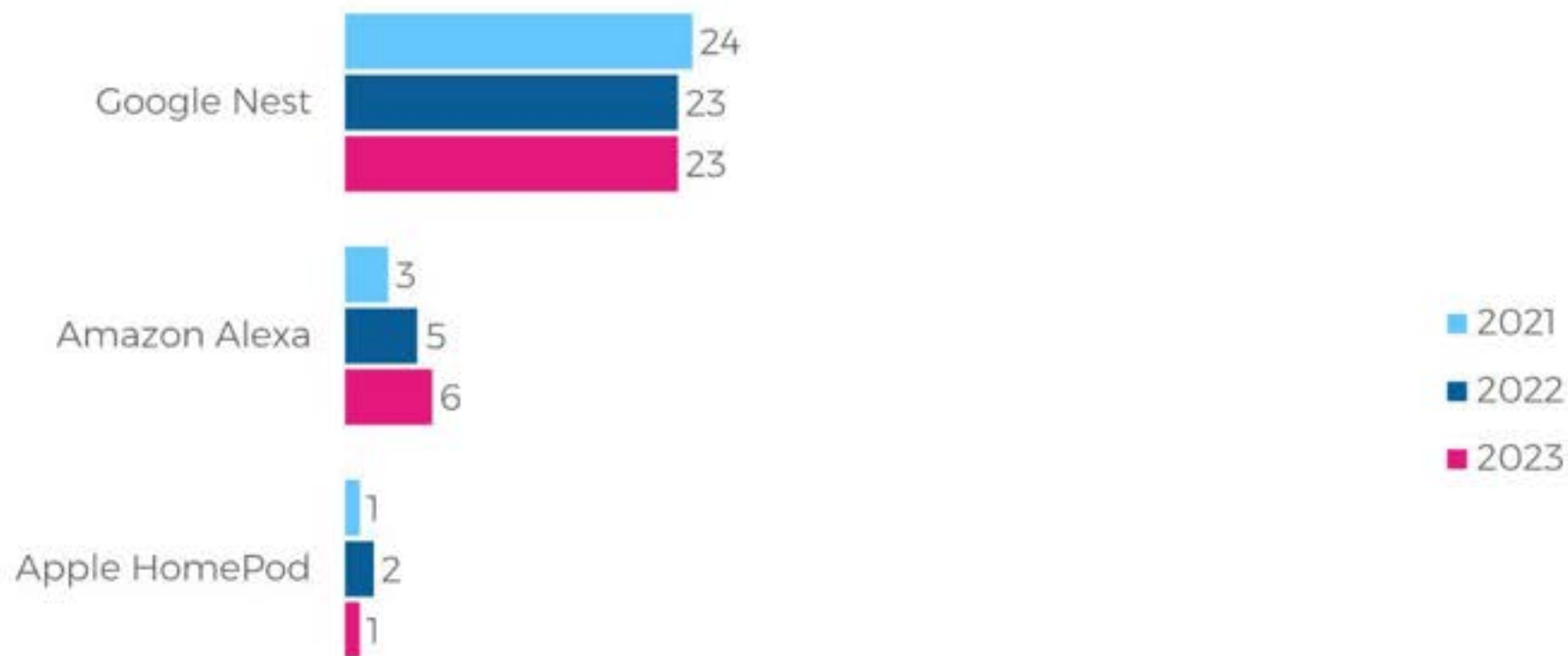
% OWNING A SMART SPEAKER



# Smart Speaker Ownership

TOTAL AUSTRALIAN POPULATION 12+

% OWNING SMART SPEAKER BRAND



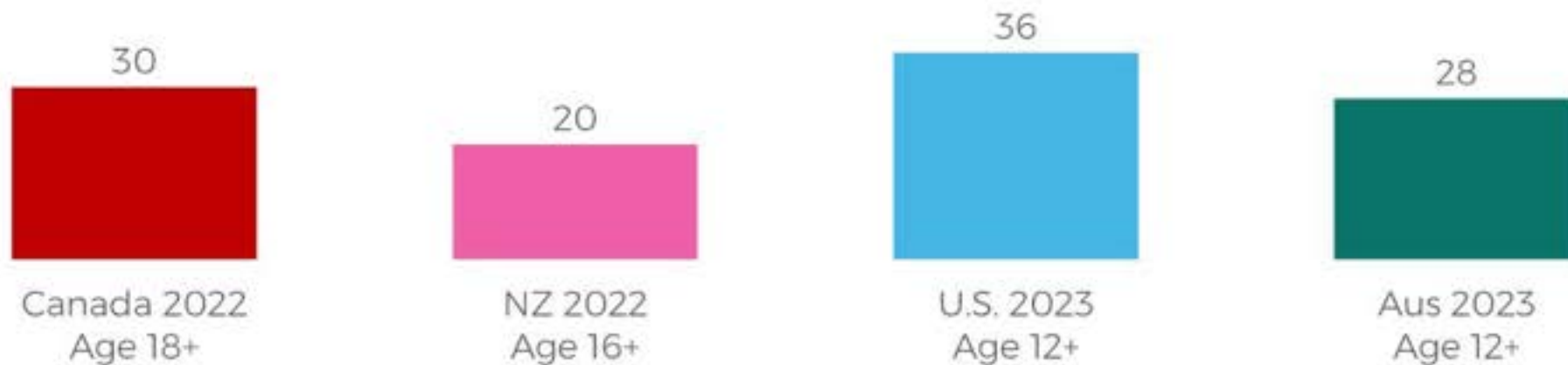
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# Smart Speaker Ownership

TOTAL POPULATIONS

% OWNING A SMART SPEAKER

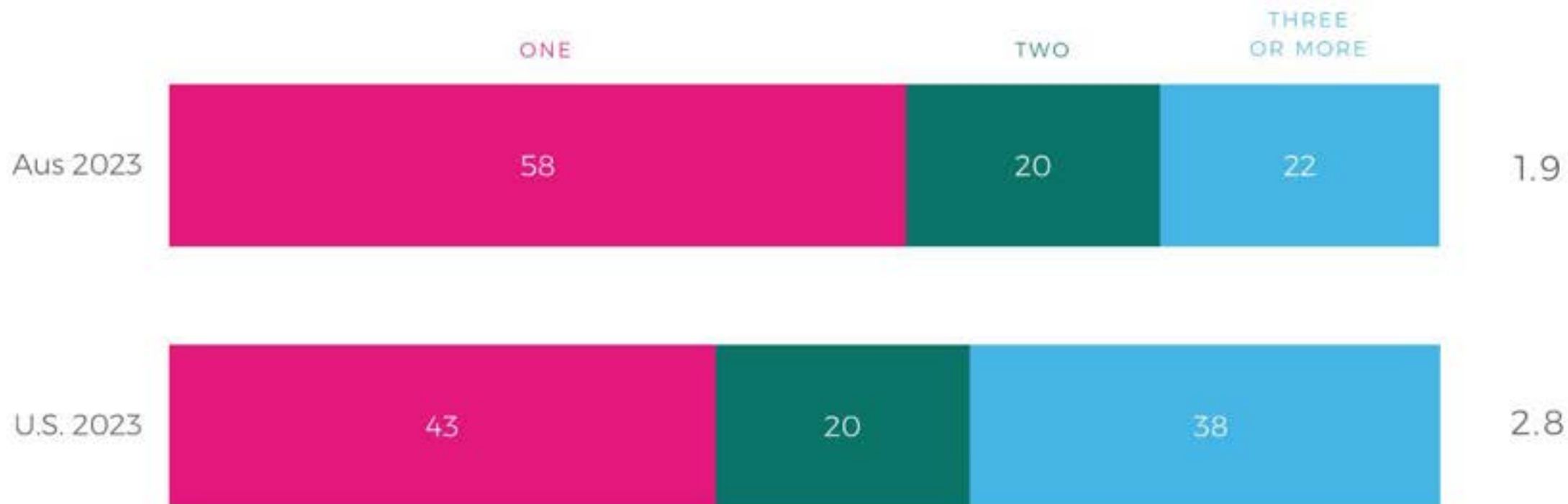


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# Number of Smart Speakers in Household

BASE: AGE 12+ WHO OWN A SMART SPEAKER





## Observations

AM/FM/DAB+ radio remains a healthy and popular medium in Australia, reaching approximately 17 million Australians each week



# Observations

DAB+ radio, in particular, has tripled its audience in the last three years



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## Observations

More cars are equipped with Apple CarPlay and Android Auto, allowing for more online audio listening in the car



# Observations

Podcast listening has reached new highs in Australia, with 43% of the 12+ population listening in the last month



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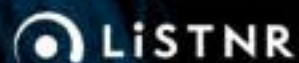
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 THE INFINITE DIAL 2023

# The Infinite Dial 2023

Australia



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