

 THE INFINITE DIAL® 2019

The Infinite Dial 2019

Australia

#InfiniteDial



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Study Overview

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

Study Methodology

- ▶ In the first quarter of 2019, Edison Research conducted a national telephone survey of 1,021 people aged 12 and older
- ▶ Data weighted to national 12+ population figures

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Radio & Radio Simulcast

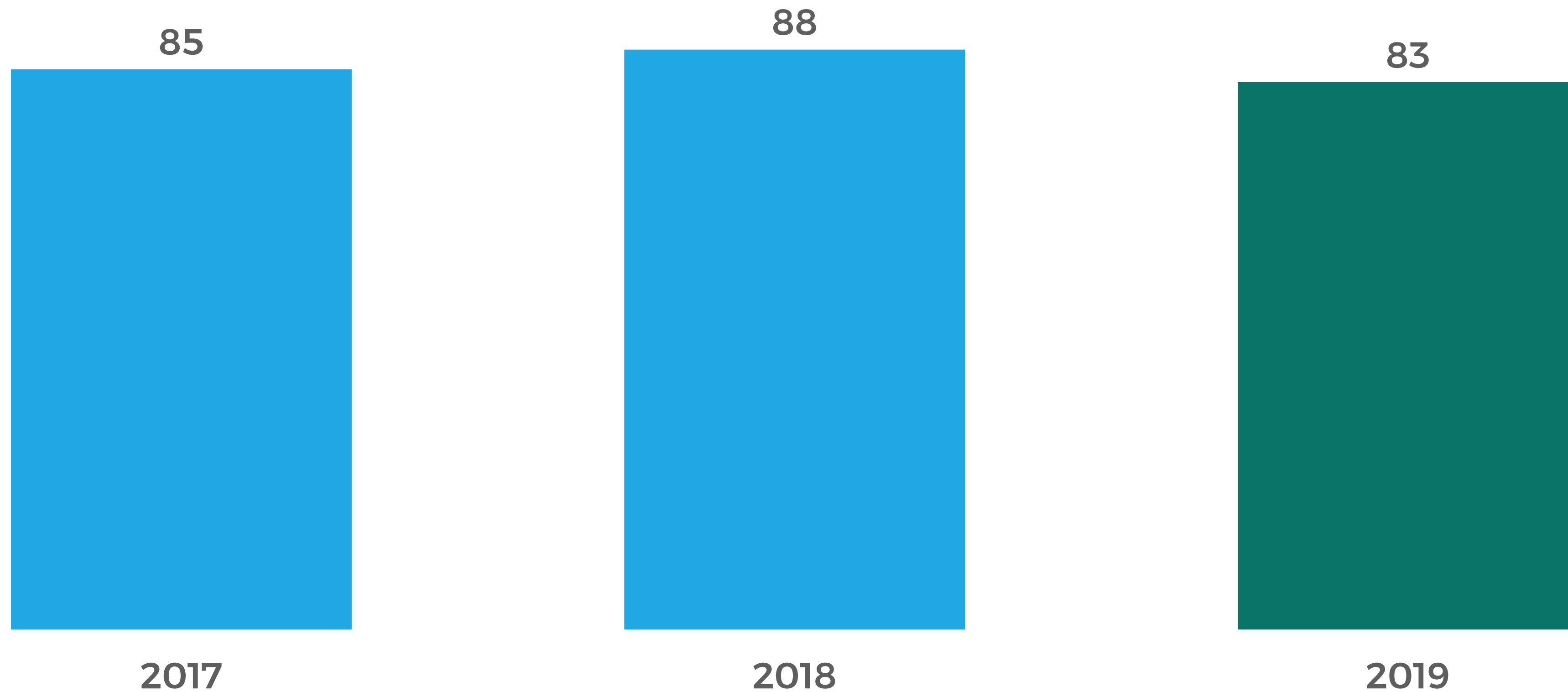


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Listening to AM/FM/DAB+ Radio in the Last Week

TOTAL AUSTRALIAN POPULATION 12+

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



AM/FM RADIO INCLUDES BOTH OVER-THE-AIR AND ONLINE; 2017 FIGURES DO NOT INCLUDE DAB+ LISTENING



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Listening to AM/FM Radio in the Last Week

TOTAL POPULATION 12+

% LISTENING TO AM/FM RADIO IN THE LAST WEEK



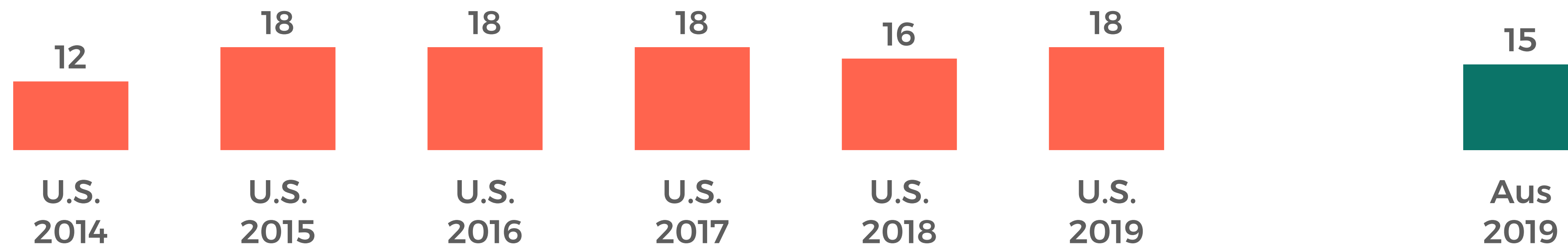
AM/FM RADIO INCLUDES BOTH OVER-THE-AIR AND ONLINE



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Online Listening to AM/FM Radio in the Last Month

TOTAL POPULATION 12+



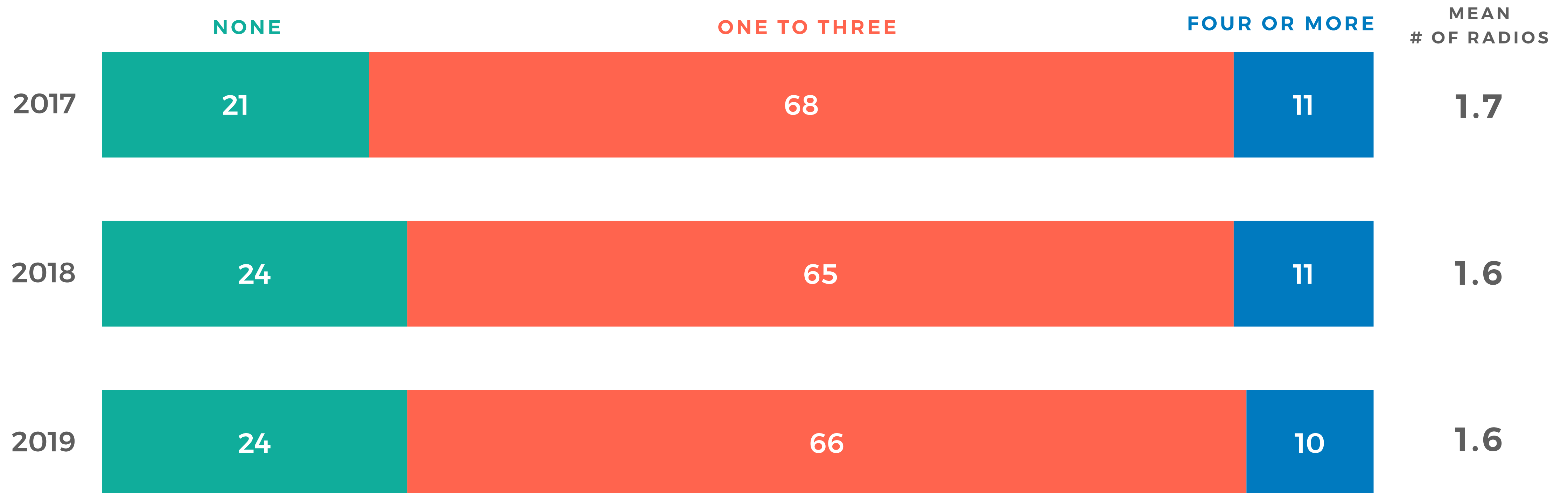
*2008-2012: EVER USE FACEBOOK, TWITTER, OR LINKEDIN



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Number of AM/FM/DAB+ Radios in Household

TOTAL AUSTRALIAN POPULATION 12+



2017 FIGURES DO NOT INCLUDE DAB+ RADIOS



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Audio Aggregators

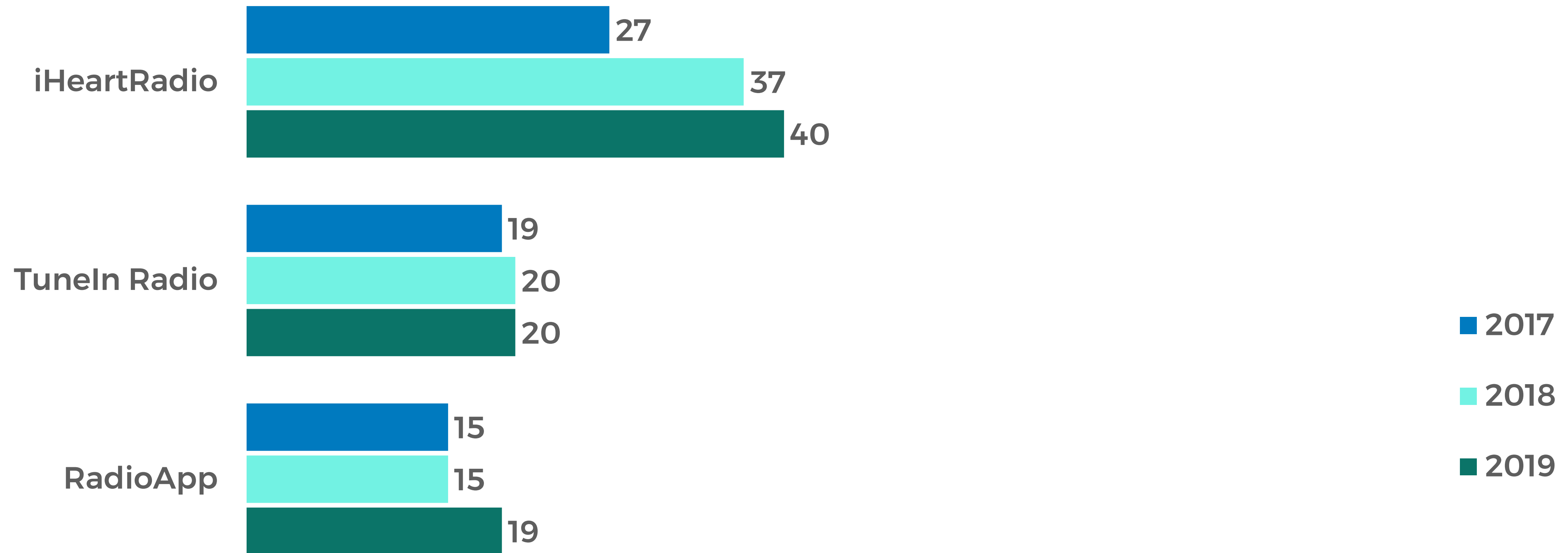


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Audio Aggregator Brand Awareness

TOTAL AUSTRALIAN POPULATION 12+

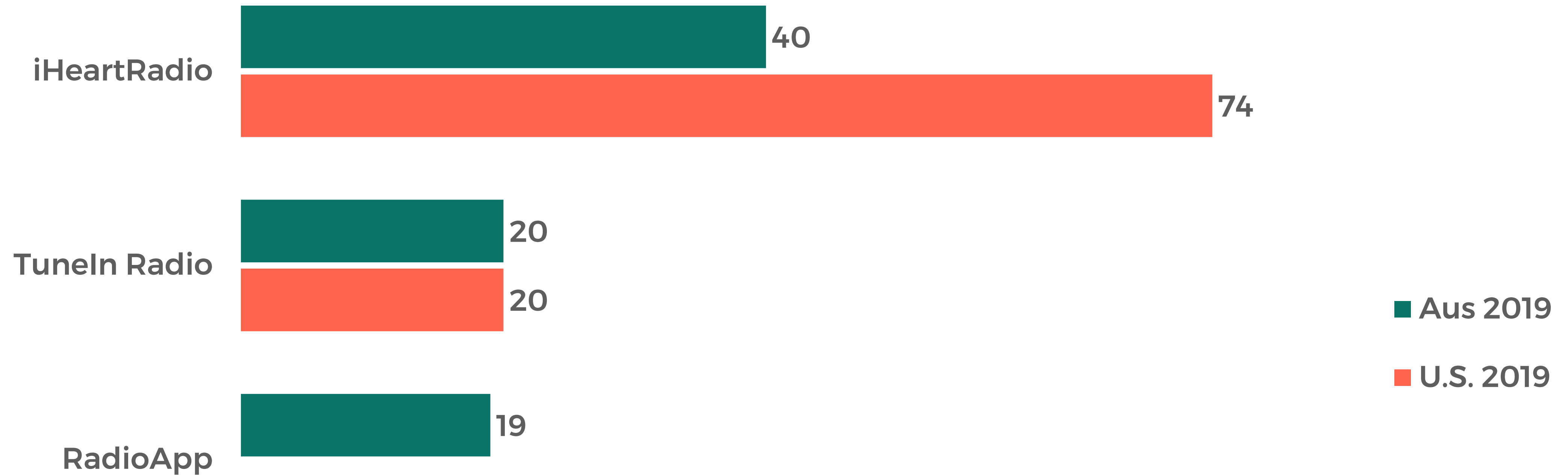
% AWARE OF AUDIO AGGREGATOR BRAND



Audio Aggregator Brand Awareness

TOTAL POPULATION 12+

% AWARE OF AUDIO AGGREGATOR BRAND



Listened to Audio Aggregators in Last Month

TOTAL AUSTRALIAN POPULATION 12+

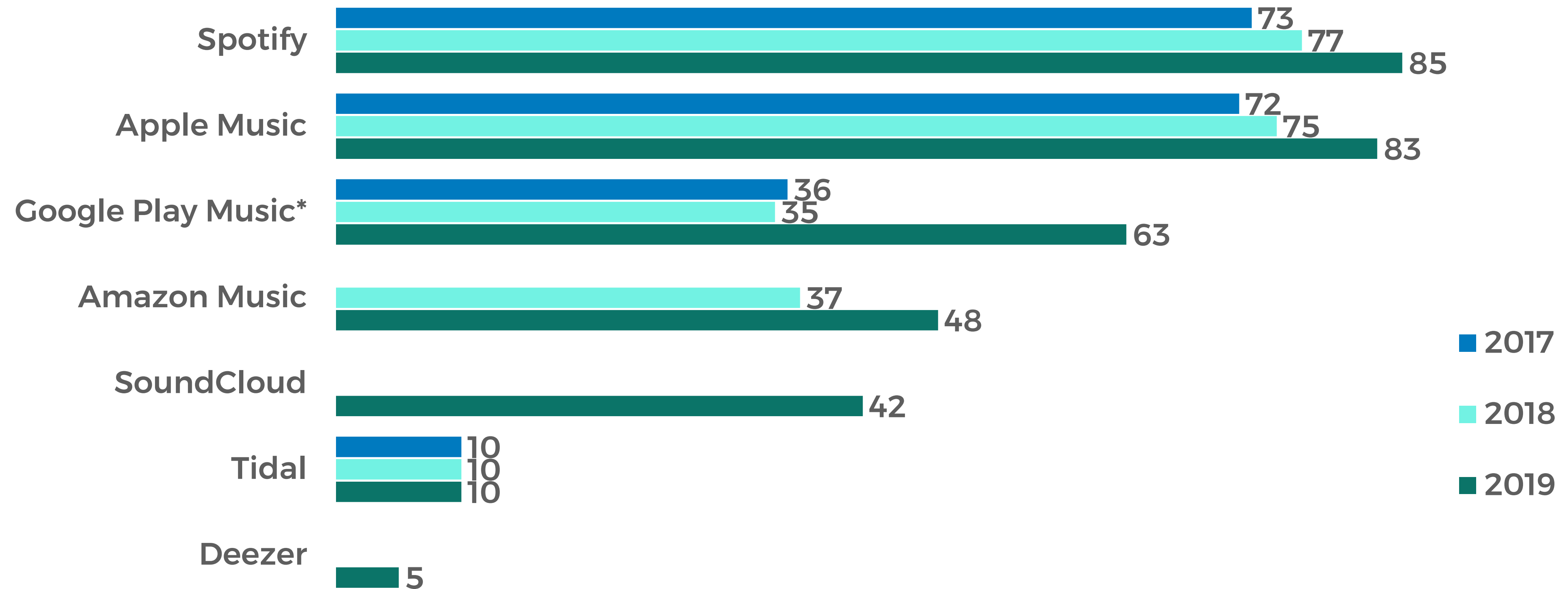


Online Audio Streaming Services

Awareness of Online Audio Streaming Services

TOTAL AUSTRALIAN POPULATION 12+

% AWARE OF ONLINE AUDIO STREAMING SERVICE



*2017-2018: GOOGLE PLAY ALL ACCESS

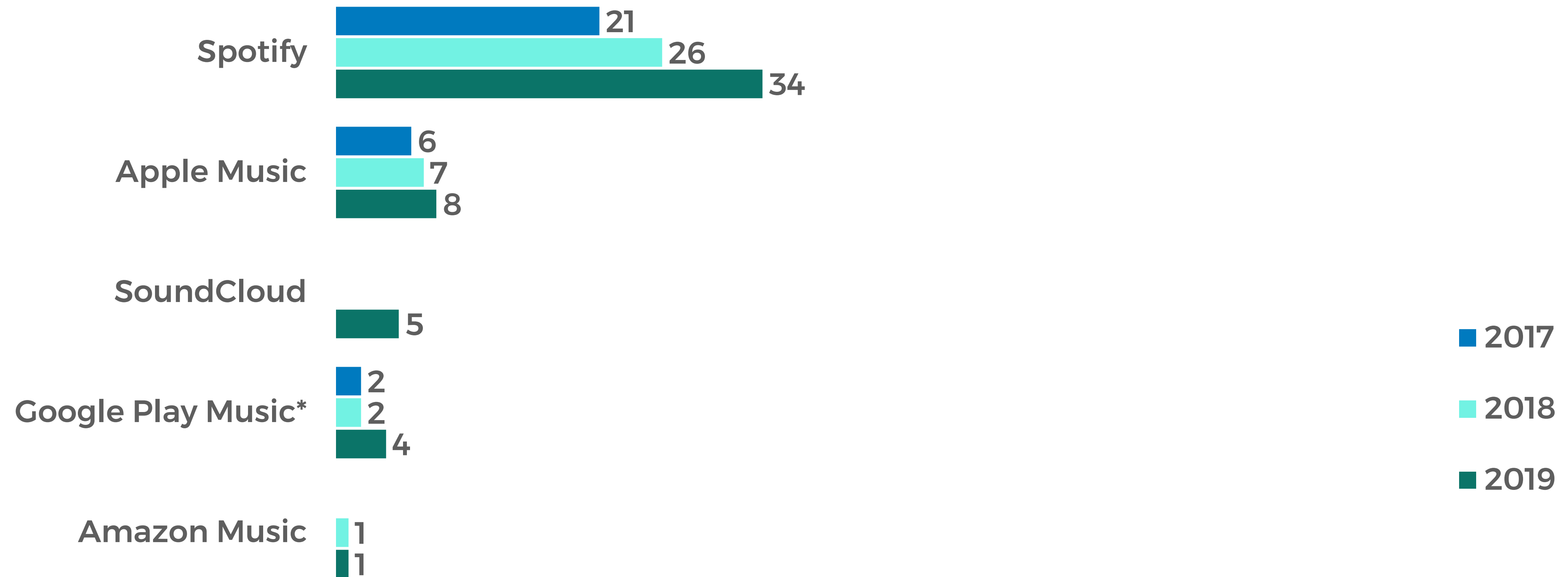


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Weekly Listening to Online Audio Streaming Services

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO ONLINE AUDIO STREAMING SERVICE IN LAST WEEK



*2017-2018: GOOGLE PLAY ALL ACCESS

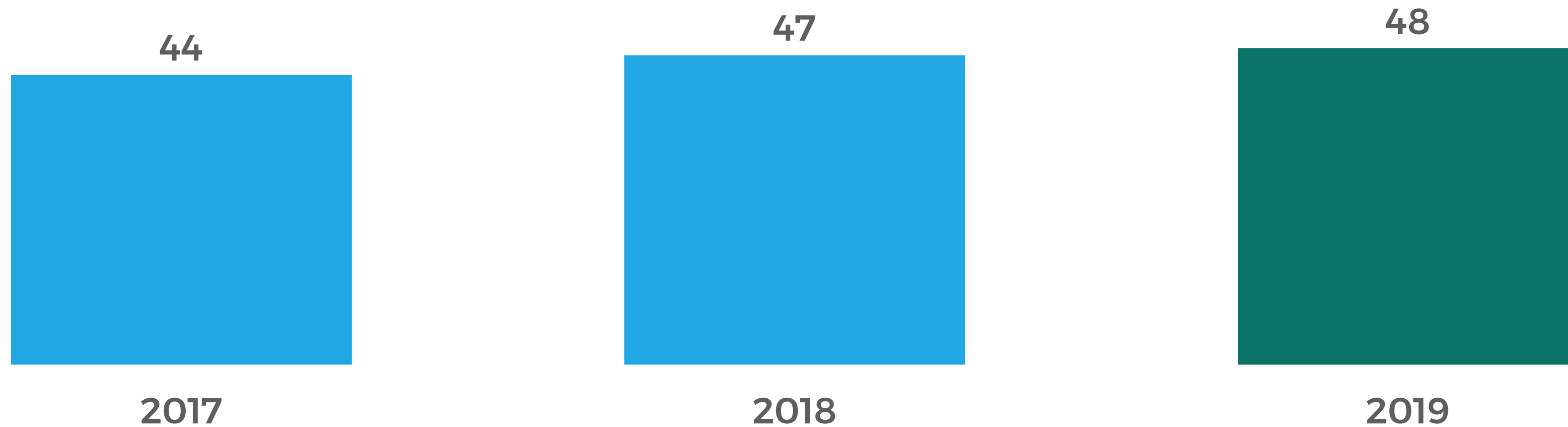


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Weekly YouTube Music Usage

TOTAL AUSTRALIAN POPULATION 12+

% USED YOUTUBE FOR MUSIC OR MUSIC VIDEOS IN LAST WEEK



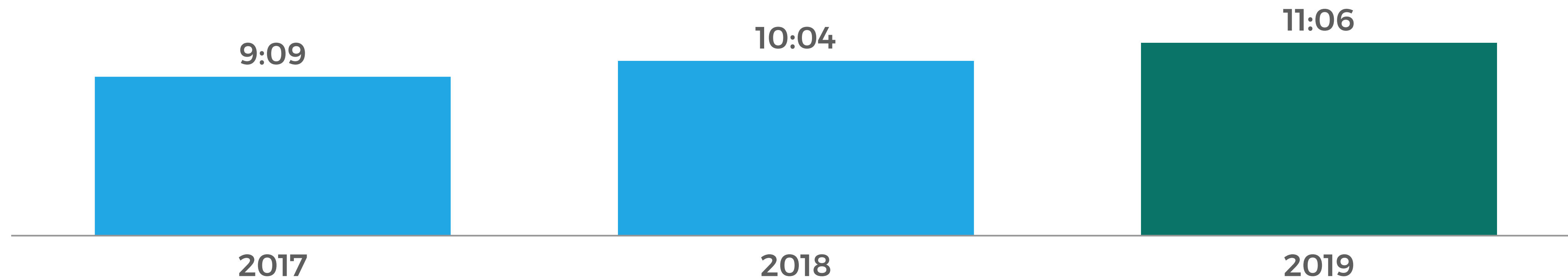
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Average Time Spent Listening to Online Audio

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



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In-Car Media

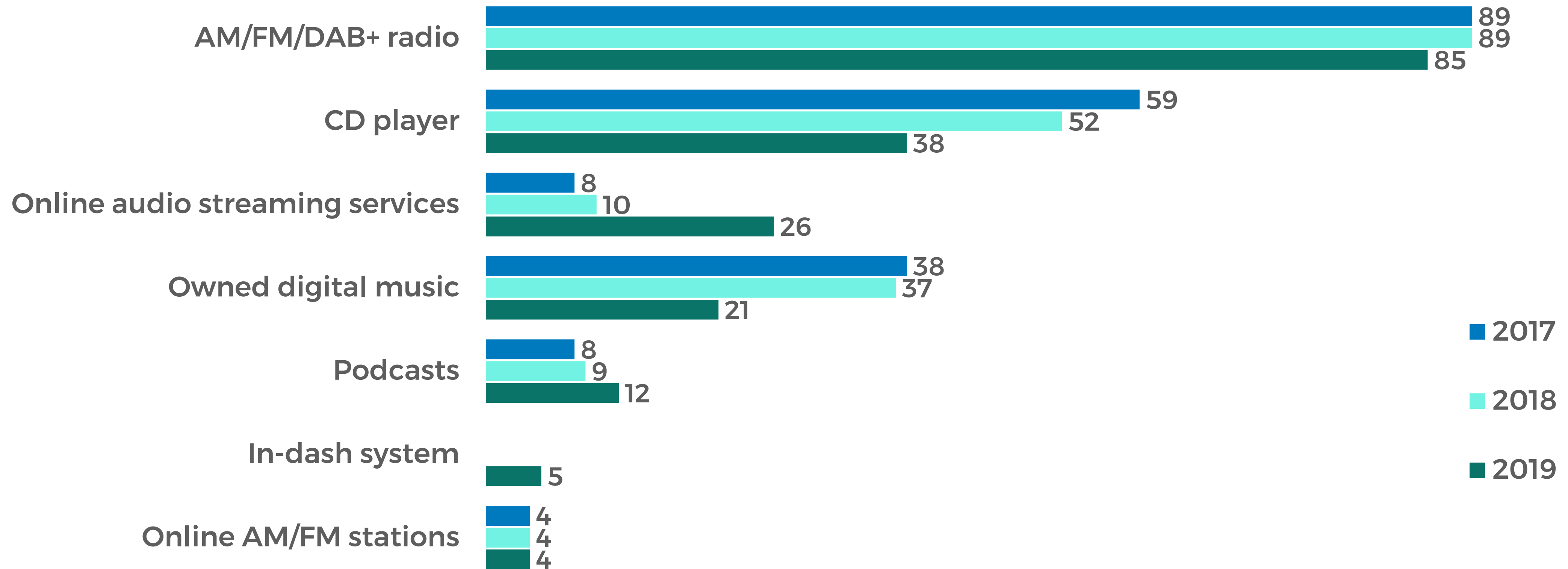


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Audio Sources Used in Car

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

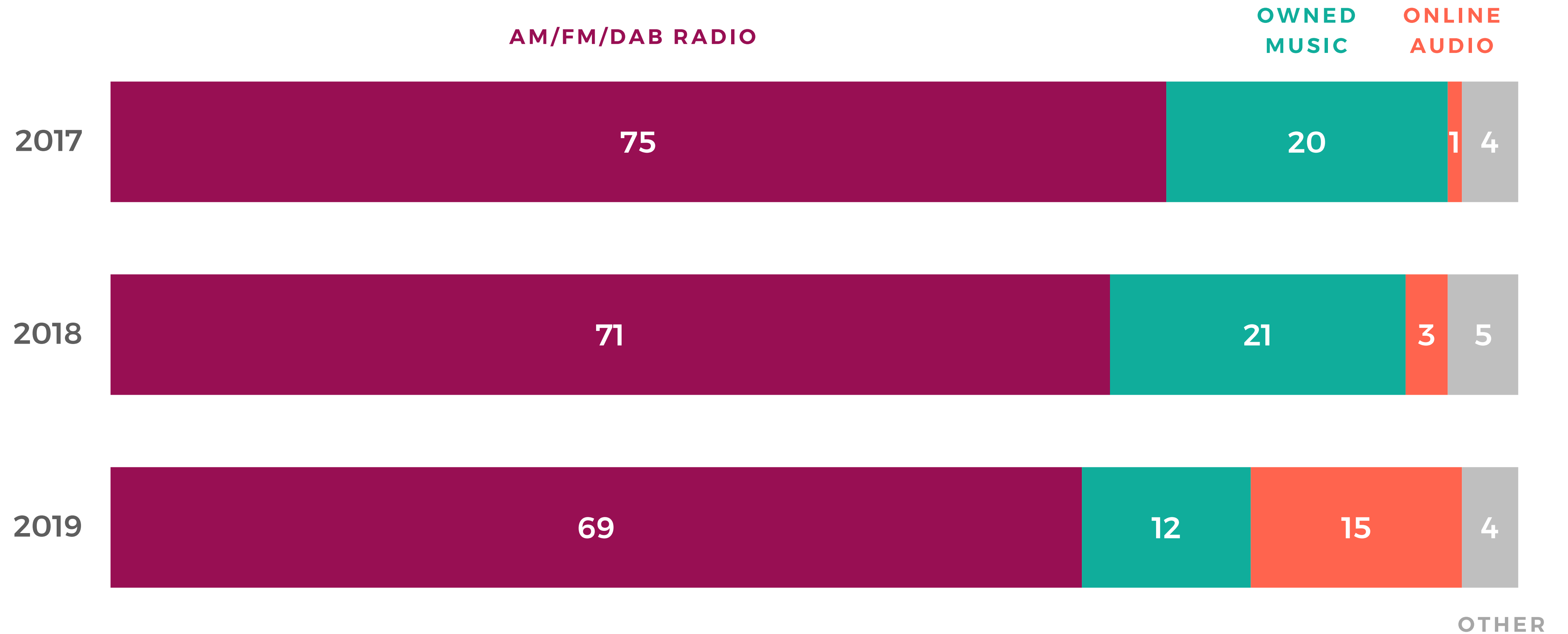
% USING AUDIO SOURCE IN CAR



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Audio Source Used Most Often in Car

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

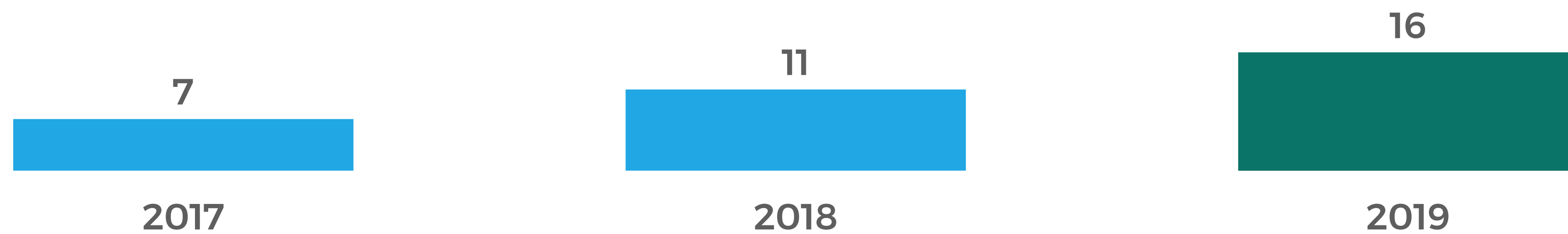


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In-Dash Information and Entertainment Systems

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

% OWNING IN-DASH INFORMATION AND ENTERTAINMENT SYSTEM IN CAR



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Podcasting

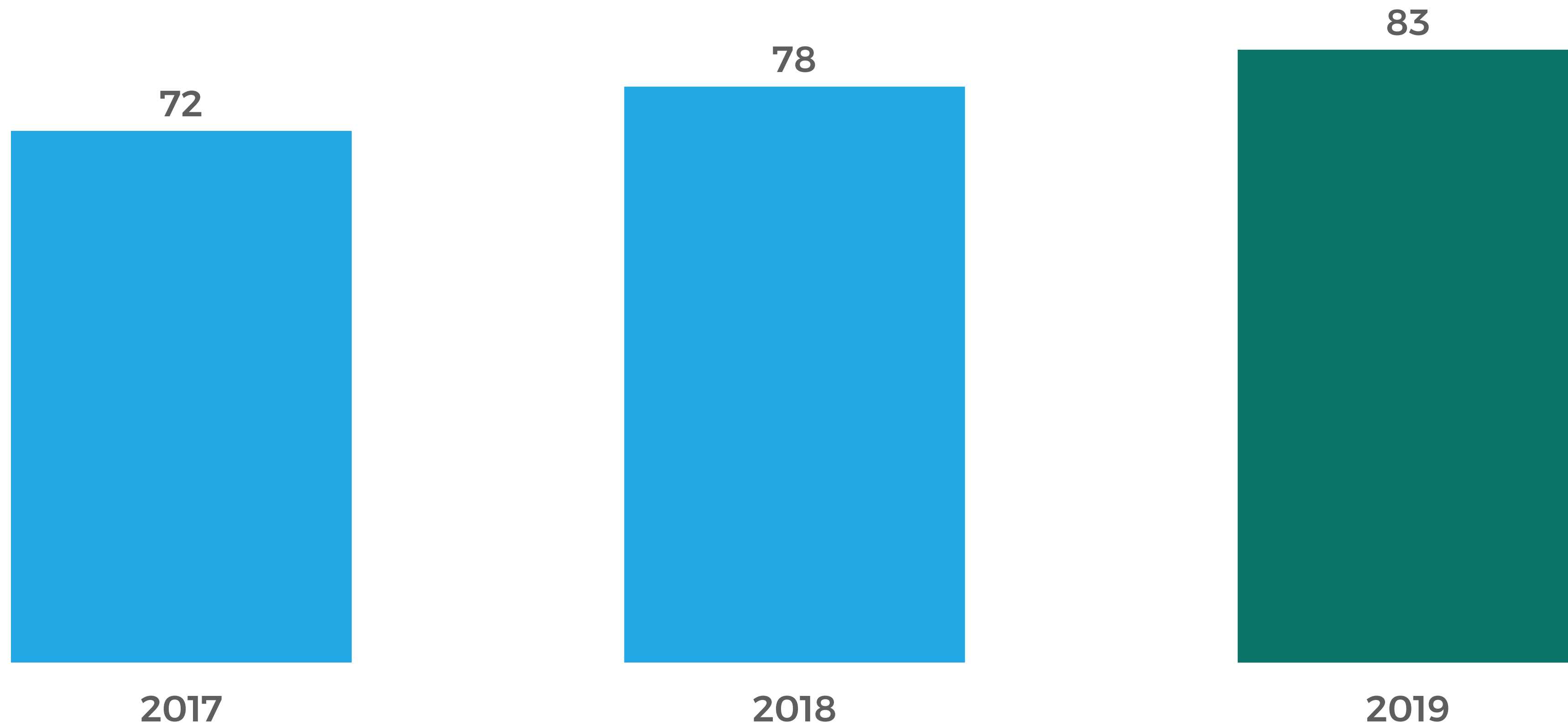


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Podcasting Awareness

TOTAL AUSTRALIAN POPULATION 12+

% AWARE OF PODCASTING

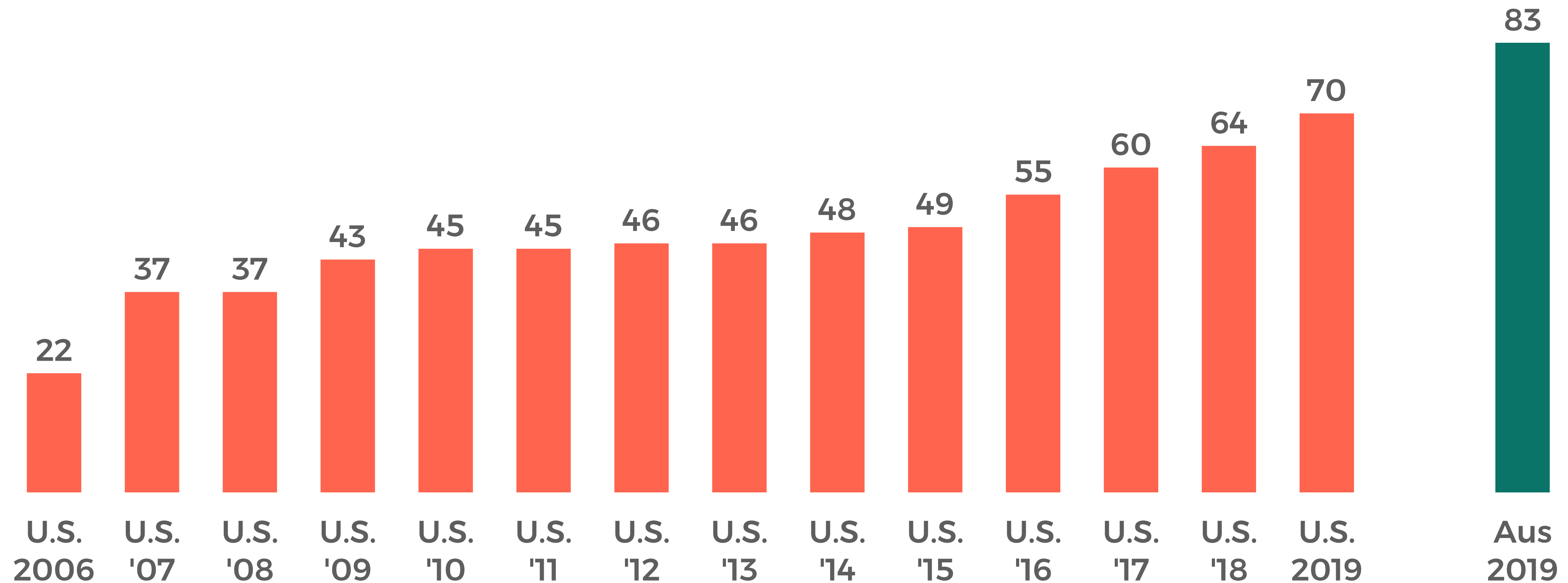


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Podcasting Awareness

TOTAL POPULATION 12+

% AWARE OF PODCASTING

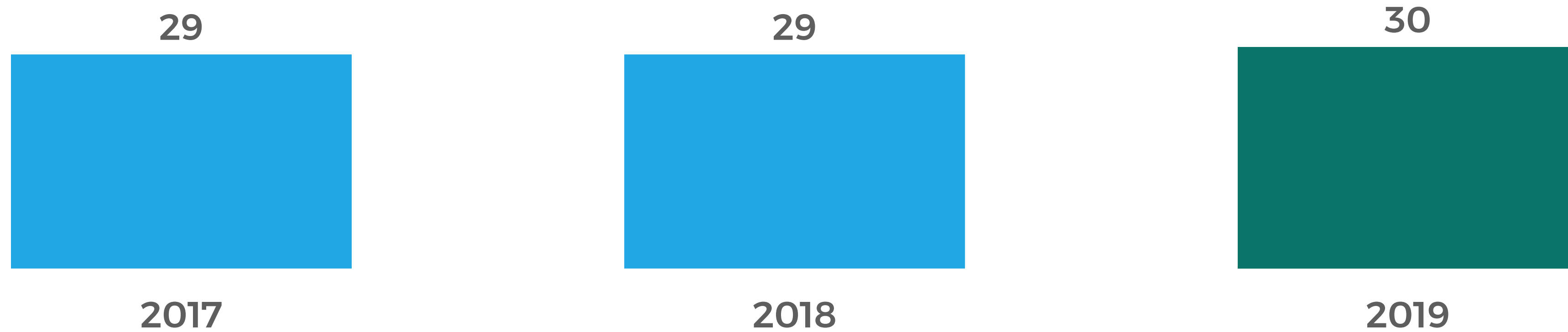


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Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+

% EVER LISTENED TO A PODCAST

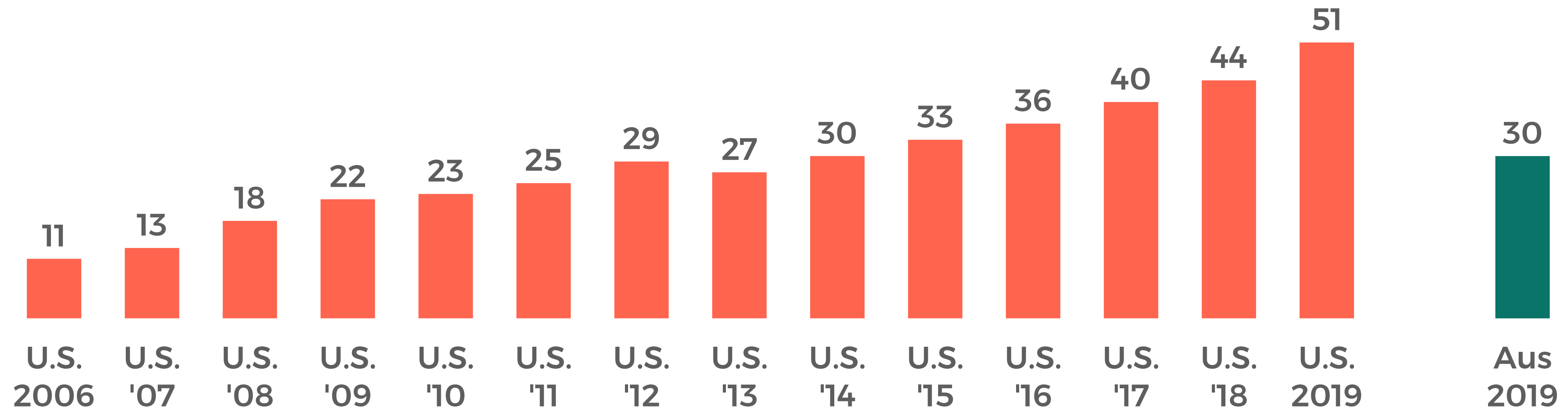


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Podcast Listening

TOTAL POPULATION 12+

% EVER LISTENED TO A PODCAST

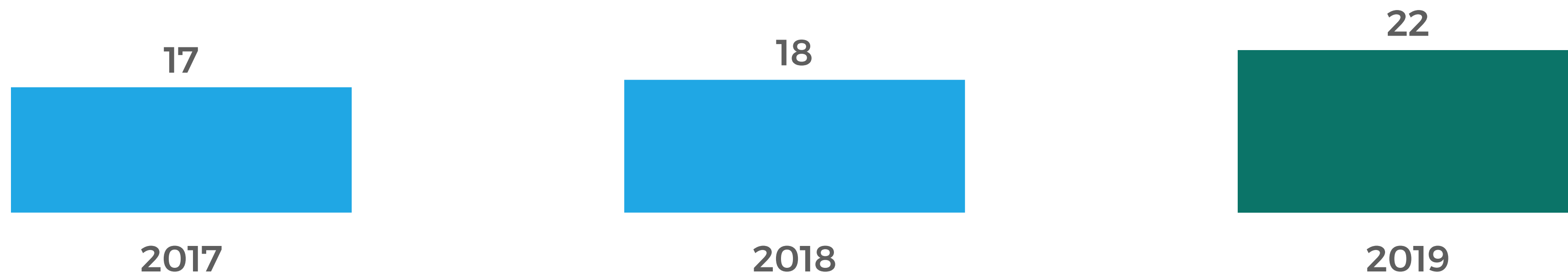


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Monthly Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO A PODCAST IN LAST MONTH

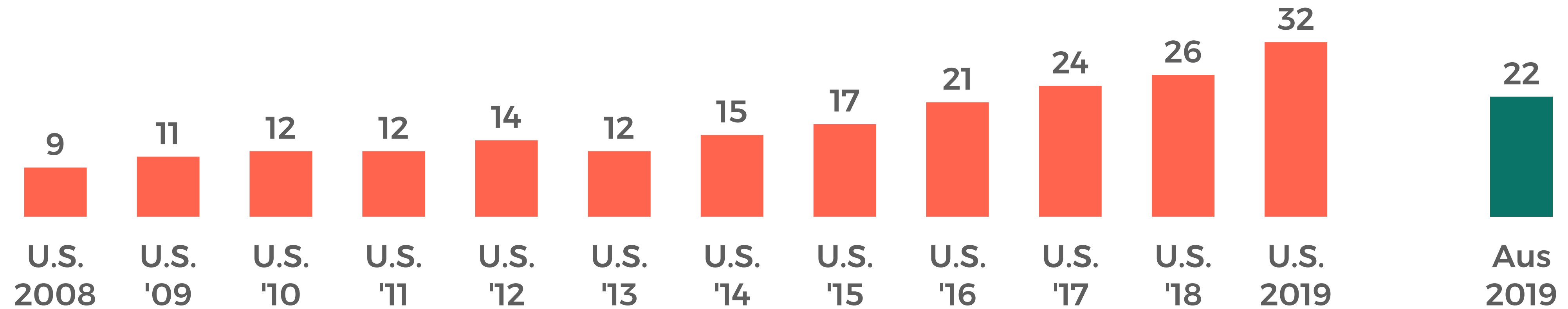


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Monthly Podcast Listening

TOTAL POPULATION 12+

% LISTENED TO A PODCAST IN LAST MONTH

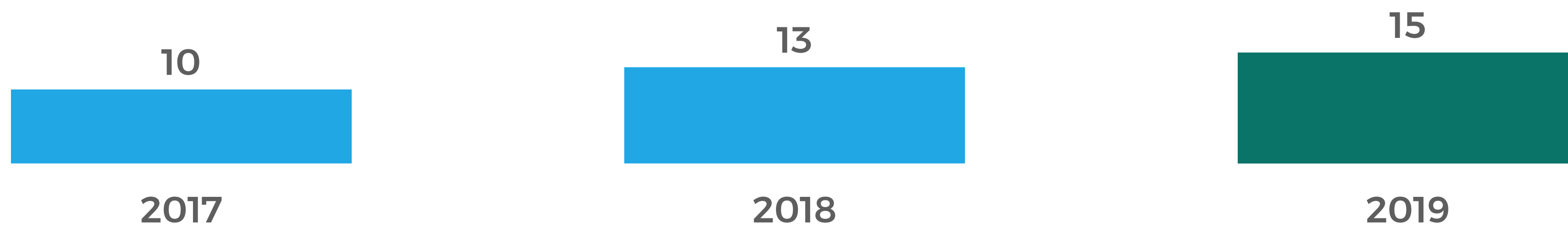


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Weekly Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO A PODCAST IN LAST WEEK

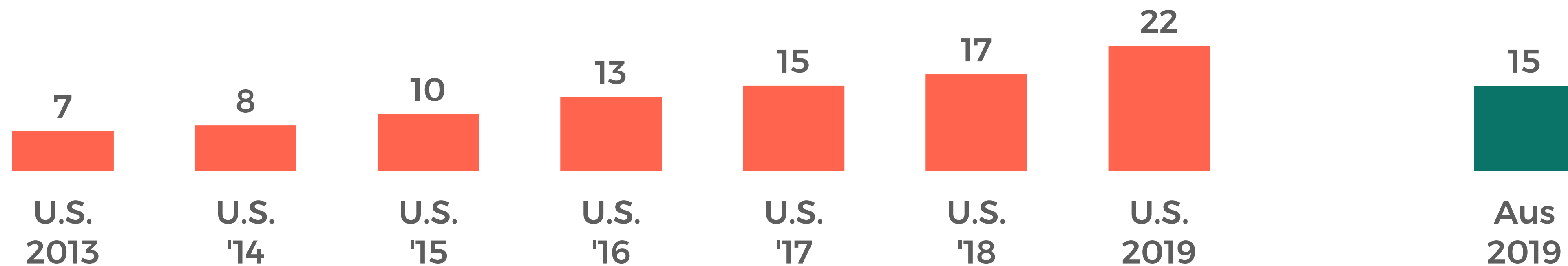


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Weekly Podcast Listening

TOTAL POPULATION 12+

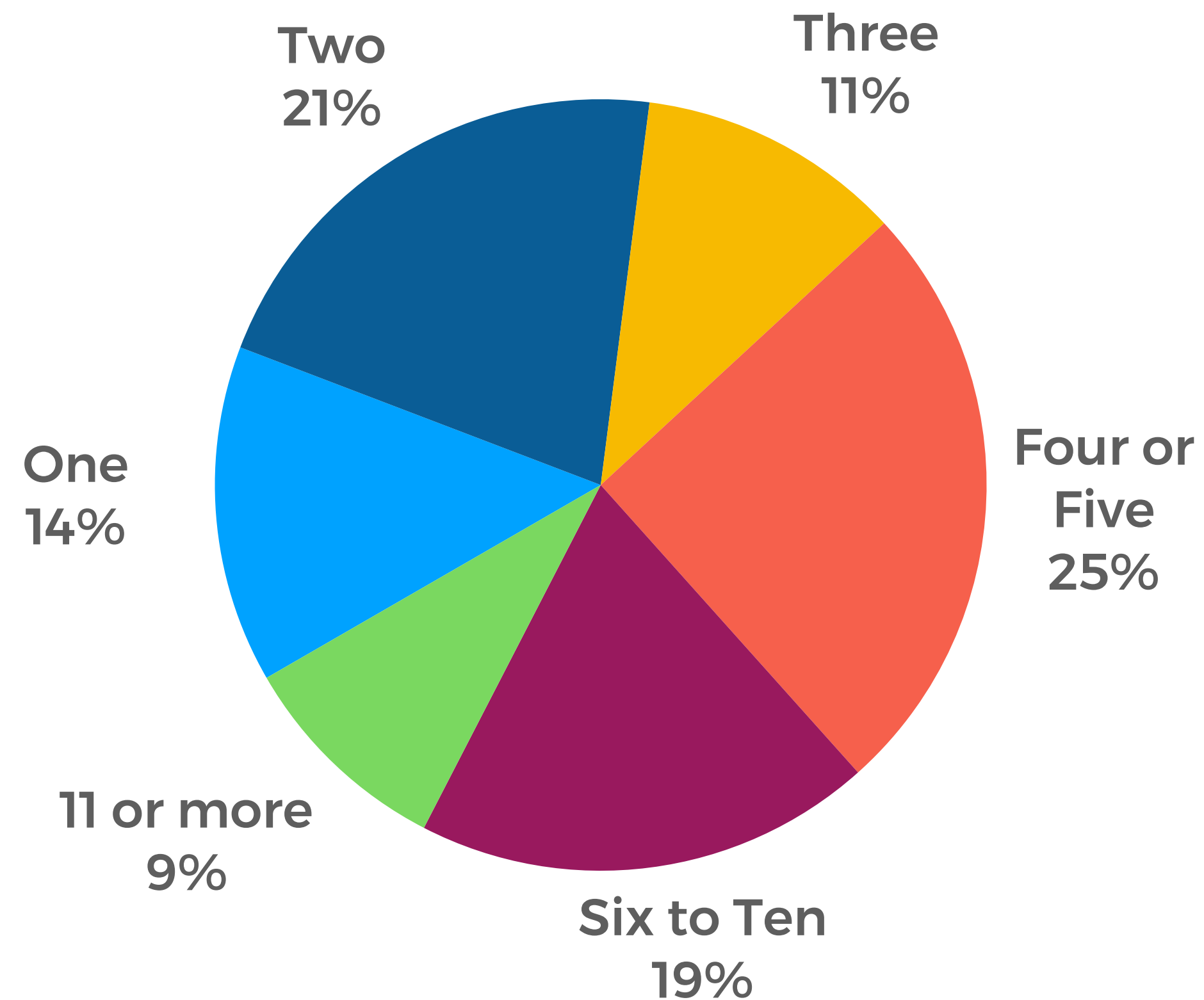
% LISTENED TO A PODCAST IN LAST WEEK



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Number of Podcasts Listened to in Last Week

BASE: AUSTRALIAN 12+ AND LISTENED TO PODCAST IN LAST WEEK; 15%



Australian weekly podcast listeners averaged

Six podcasts

in the last week

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Social Media

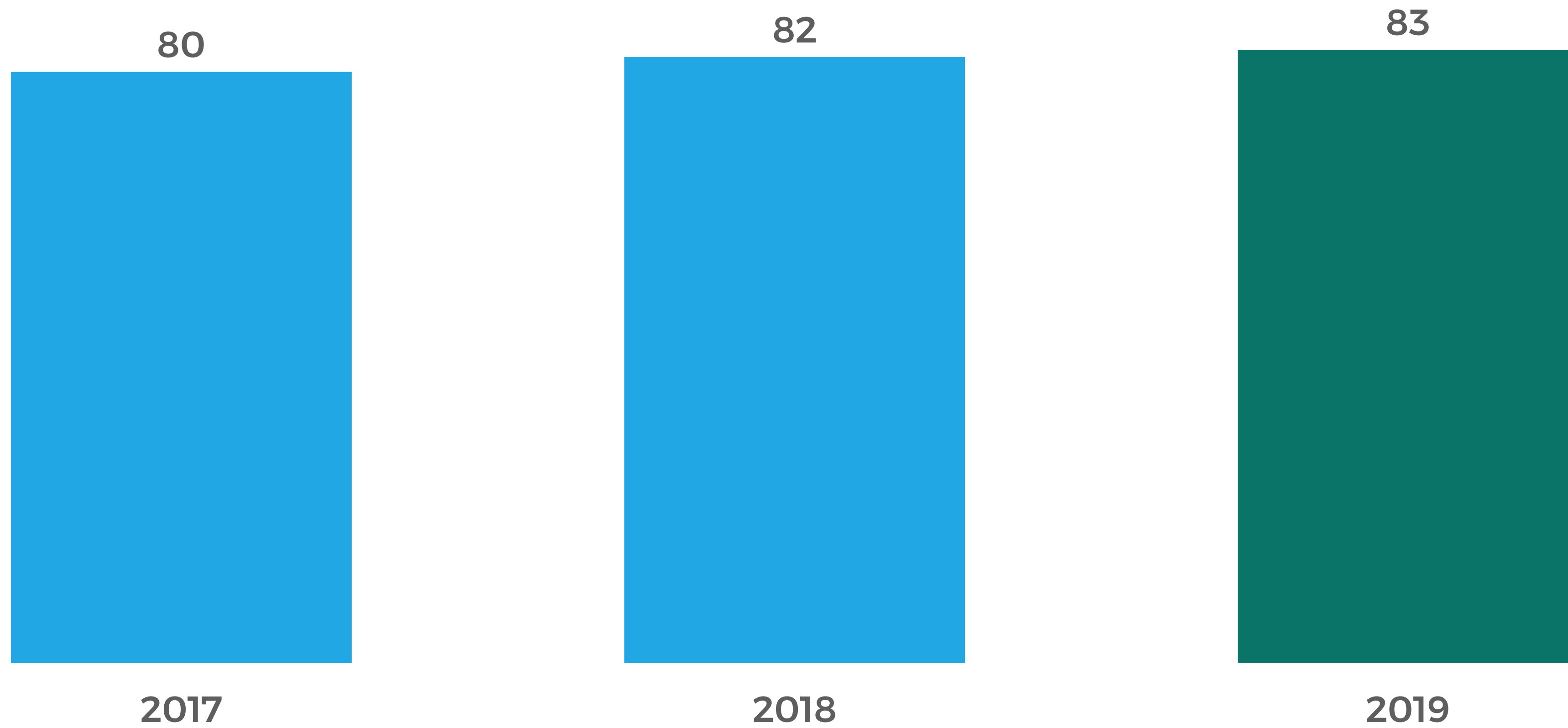


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Social Media Usage

TOTAL AUSTRALIAN POPULATION 12+

% USING SOCIAL MEDIA



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Social Media Brand Awareness

TOTAL AUSTRALIAN POPULATION 12+

% AWARE OF SOCIAL MEDIA BRAND

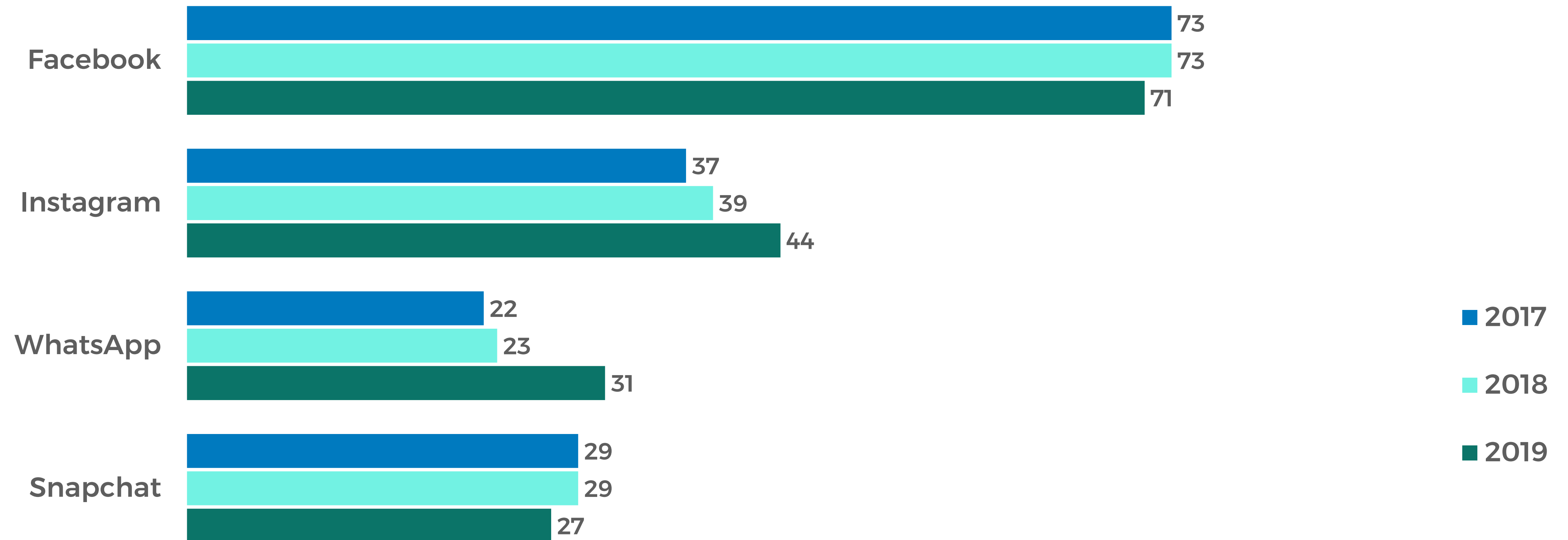


Social Media Brand Usage

TOTAL AUSTRALIAN POPULATION 12+

% USING SOCIAL MEDIA BRAND

PAGE 1

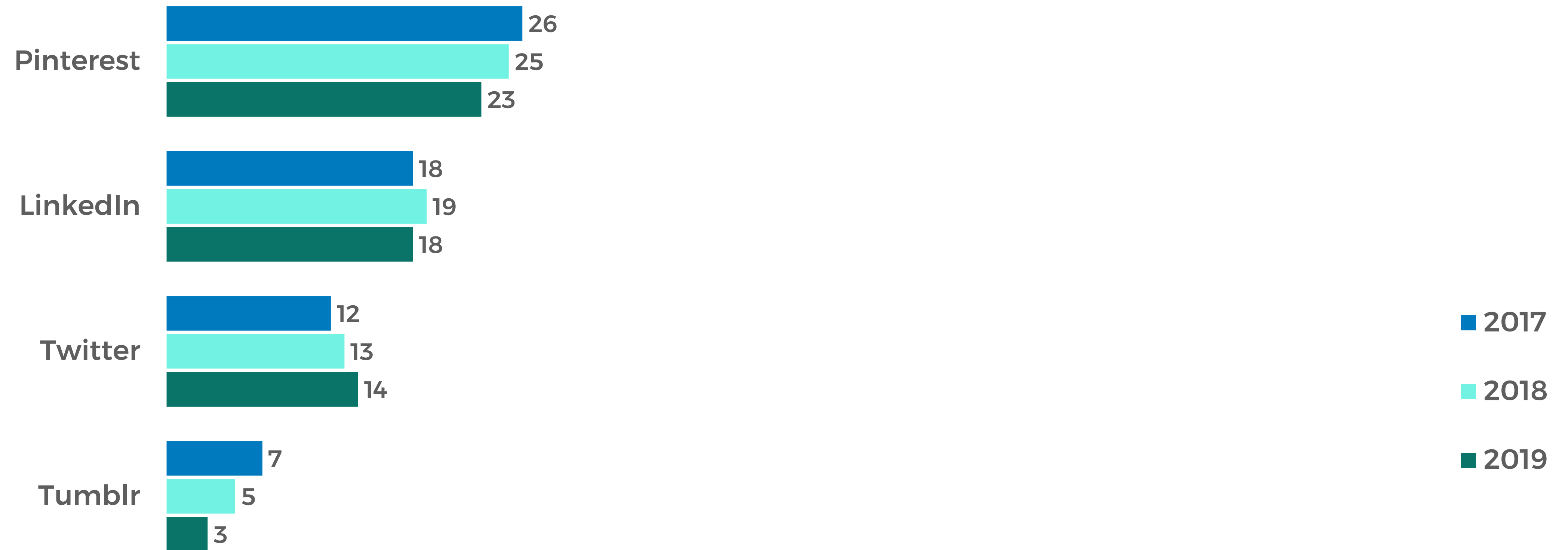


Social Media Brand Usage

TOTAL AUSTRALIAN POPULATION 12+

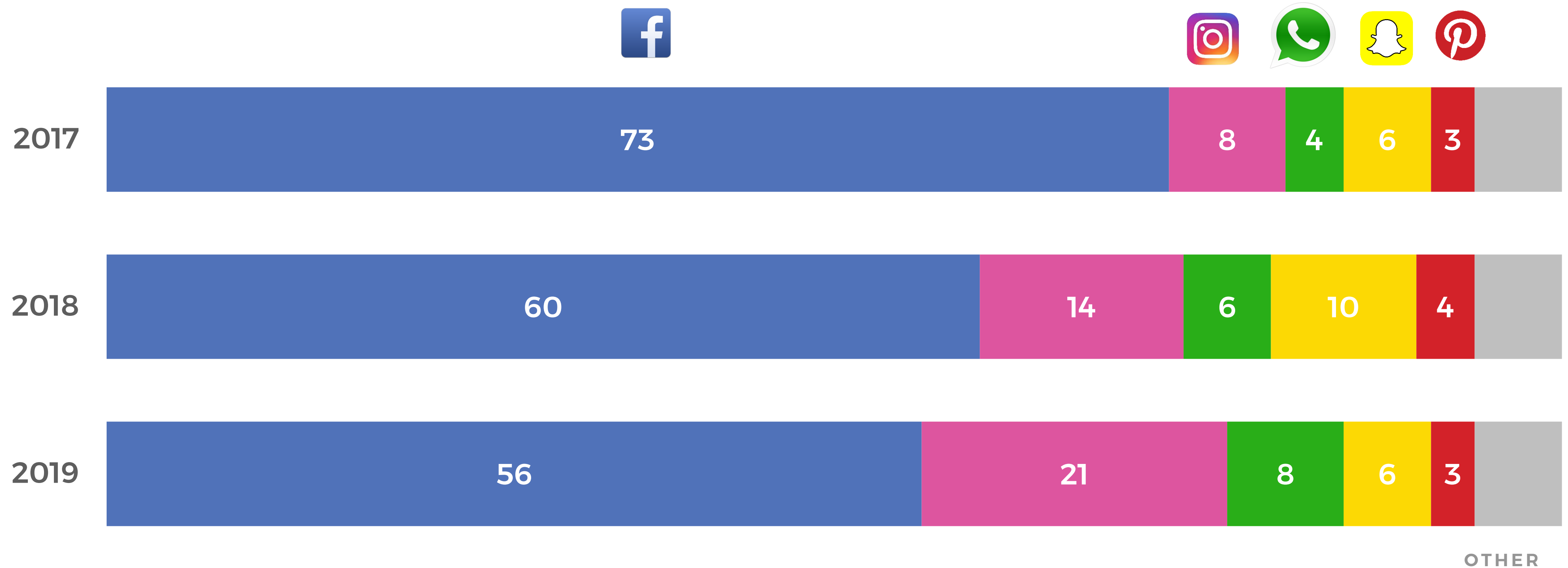
% USING SOCIAL MEDIA BRAND

PAGE 2



Social Media Brand Used Most Often

BASE: AUSTRALIAN 12+ SOCIAL MEDIA USERS



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Devices & Technologies

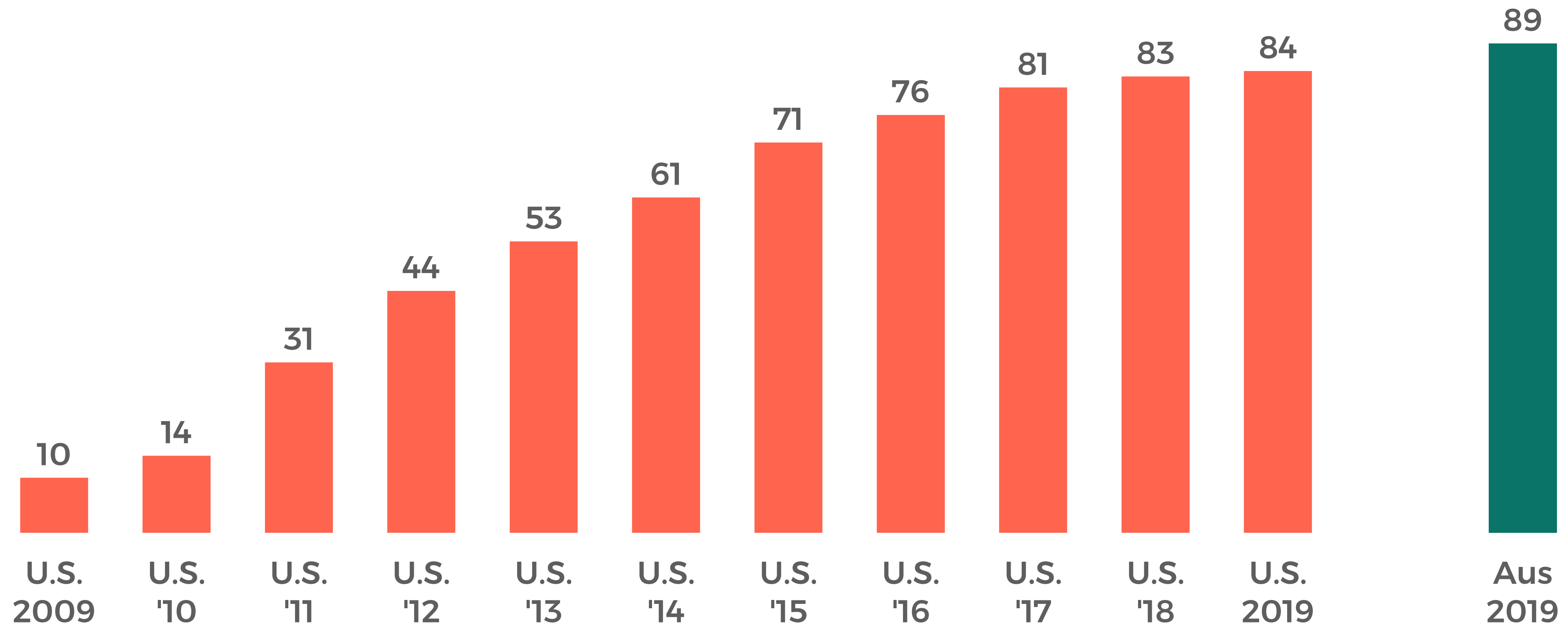


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Smartphone Ownership

TOTAL POPULATION 12+

% OWNING A SMARTPHONE



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Smart Speaker Awareness

TOTAL AUSTRALIAN POPULATION 12+

% AWARE OF ANY SMART SPEAKER BRAND

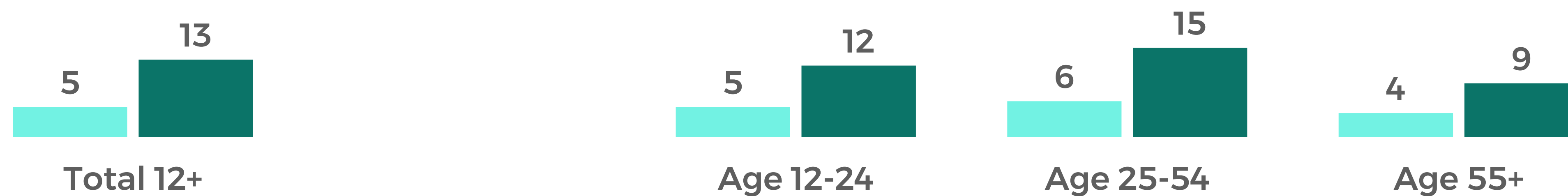


Smart Speaker Ownership

TOTAL AUSTRALIAN POPULATION 12+

% OWNING A SMART SPEAKER

■ 2018 ■ 2019

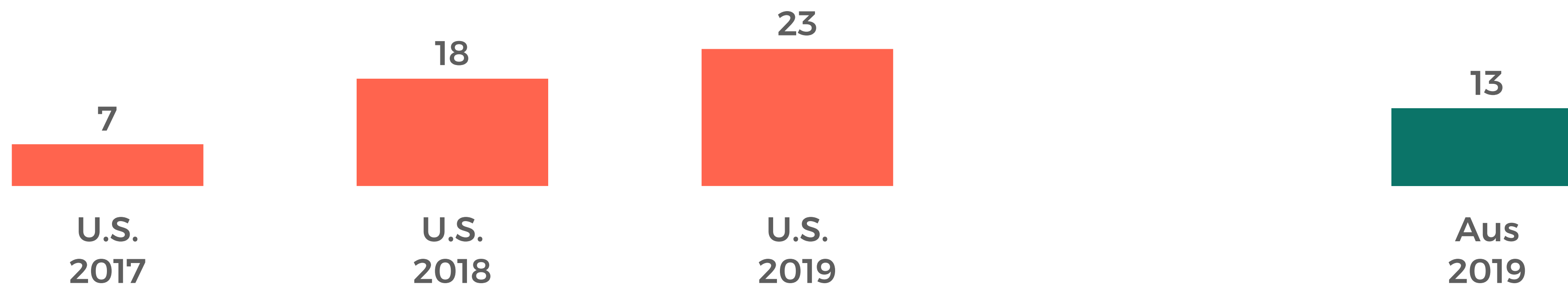


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Smart Speaker Ownership

TOTAL POPULATION 12+

% OWNING A SMART SPEAKER



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Observations

- The audio space is extremely dynamic today, creating opportunities and threats for all players

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- Three of the “FAANG” companies are now actively working in Audio and Facebook is widely rumoured to be planning its entry

Observations

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

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

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