The Infinite Dial 2020
Australia

#InfiniteDial
Presentation Outline

STUDY OVERVIEW & METHODOLOGY

RADIO & RADIO SIMULCAST

IN-CAR MEDIA

PODCASTING

OBSERVATIONS

ONLINE AUDIO STREAMING SERVICES

SMART SPEAKERS

ONLINE AUDIO
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
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

87
2019

85
2020

#InfiniteDial
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

2019: 83%
2020: 82%

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

TOTAL AUSTRALIAN POPULATION 12+

Over-the-air
- 2018: 86%
- 2019: 81%
- 2020: 80%

Online
- 2018: 9%
- 2019: 10%
- 2020: 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

- Germany 2019: 62%
- South Africa 2019: 68%
- U.S. 2020: 65%
- Australia 2020: 82%
- Canada 2020: 69%
### 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**

<table>
<thead>
<tr>
<th>Year</th>
<th>Radio Station’s Website</th>
<th>Radio Station’s App on Mobile Device</th>
<th>Aggregator (Such as RadioApp or TuneIn)</th>
<th>Don’t Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>45</td>
<td>30</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td>2019</td>
<td>38</td>
<td>32</td>
<td>22</td>
<td></td>
</tr>
<tr>
<td>2020</td>
<td>39</td>
<td>30</td>
<td>27</td>
<td></td>
</tr>
</tbody>
</table>
In-Car Media
Audio Sources Used in Car

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

% USING AUDIO SOURCE IN CAR

- Online audio streaming services*: 33% (2020), 26% (2019), 10% (2018), 8% (2017)
- In-dash system: 7% (2020), 5% (2019), 4% (2018), 4% (2017)
- Online AM/FM stations: 4% (2020), 4% (2019), 4% (2018), 4% (2017)

*SUCH AS SPOTIFY, YOUTUBE, OR APPLE MUSIC

#InfiniteDial
Audio Sources Used in Car

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

% USING AUDIO SOURCE IN CAR

- AM/FM radio: 83% (Aus 2020), 81% (U.S. 2020)
- CD player: 32% (Aus 2020), 41% (U.S. 2020)
- Owned digital music: 19% (Aus 2020), 48% (U.S. 2020)
- Podcasts: 14% (Aus 2020), 28% (U.S. 2020)
- Online audio streaming services*: 34% (Aus 2020), 33% (U.S. 2020)
- SiriusXM: 24% (U.S. 2020)

*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

<table>
<thead>
<tr>
<th>Year</th>
<th>AM/FM/DAB RADIO</th>
<th>OWNED MUSIC</th>
<th>AM/FM STREAMS</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>75</td>
<td>20</td>
<td>11</td>
</tr>
<tr>
<td>2018</td>
<td>71</td>
<td>21</td>
<td>21</td>
</tr>
<tr>
<td>2019</td>
<td>69</td>
<td>12</td>
<td>15</td>
</tr>
<tr>
<td>2020</td>
<td>66</td>
<td>11</td>
<td>19</td>
</tr>
</tbody>
</table>
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

- 2017: 15%
- 2018: 29%
- 2019: 34%
- 2020: 40%
Podcasting
Podcasting Awareness

TOTAL AUSTRALIAN POPULATION 12+
% AWARE OF THE TERM "PODCASTING"

- 2017: 72%
- 2018: 78%
- 2019: 83%
- 2020: 87%
Podcasting Awareness

POPULATIONS 12+

% AWARE OF THE TERM "PODCASTING"

<table>
<thead>
<tr>
<th>Year</th>
<th>Awareness Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S. 2006</td>
<td>22</td>
</tr>
<tr>
<td>U.S. '07</td>
<td>37</td>
</tr>
<tr>
<td>U.S. '08</td>
<td>37</td>
</tr>
<tr>
<td>U.S. '09</td>
<td>43</td>
</tr>
<tr>
<td>U.S. '10</td>
<td>45</td>
</tr>
<tr>
<td>U.S. '11</td>
<td>45</td>
</tr>
<tr>
<td>U.S. '12</td>
<td>46</td>
</tr>
<tr>
<td>U.S. '13</td>
<td>46</td>
</tr>
<tr>
<td>U.S. '14</td>
<td>48</td>
</tr>
<tr>
<td>U.S. '15</td>
<td>49</td>
</tr>
<tr>
<td>U.S. '16</td>
<td>55</td>
</tr>
<tr>
<td>U.S. '17</td>
<td>60</td>
</tr>
<tr>
<td>U.S. '18</td>
<td>64</td>
</tr>
<tr>
<td>U.S. '19</td>
<td>70</td>
</tr>
<tr>
<td>U.S. 2020</td>
<td>75</td>
</tr>
<tr>
<td>Aus 2020</td>
<td>87</td>
</tr>
</tbody>
</table>

#InfiniteDial
Monthly Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO A PODCAST IN LAST MONTH

- 2017: 17%
- 2018: 18%
- 2019: 22%
- 2020: 25%

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Monthly Podcast Listening

% Listened to a Podcast in Last Month

- U.S. 2008: 9%
- U.S. '09: 11%
- U.S. '10: 12%
- U.S. '11: 12%
- U.S. '12: 14%
- U.S. '13: 15%
- U.S. '14: 17%
- U.S. '15: 21%
- U.S. '16: 24%
- U.S. '17: 26%
- U.S. '18: 32%
- U.S. '19: 37%
- U.S. 2020: 25%
- Aus 2020: 25%
Weekly Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO A PODCAST IN LAST WEEK

- 2017: 10%
- 2018: 13%
- 2019: 15%
- 2020: 17%
Weekly Podcast Listening

% LISTENED TO A PODCAST IN LAST WEEK

<table>
<thead>
<tr>
<th>Year</th>
<th>POPULATIONS 12+</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S.</td>
<td></td>
</tr>
<tr>
<td>2013</td>
<td>7</td>
</tr>
<tr>
<td>2014</td>
<td>8</td>
</tr>
<tr>
<td>2015</td>
<td>10</td>
</tr>
<tr>
<td>2016</td>
<td>13</td>
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<td>2017</td>
<td>15</td>
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<td>2018</td>
<td>17</td>
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<tr>
<td>2019</td>
<td>22</td>
</tr>
<tr>
<td>2020</td>
<td>24</td>
</tr>
<tr>
<td>Aus</td>
<td>17</td>
</tr>
<tr>
<td>2020</td>
<td></td>
</tr>
</tbody>
</table>

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Podcast Listening Locations

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

% LISTENED TO A PODCAST IN LOCATION

- At home: 81%
- In a car/truck: 45%
- While walking around/on foot: 26%
- While riding public transportation: 18%
- At work: 14%
- At a gym/while working out: 9%
Device Used Most Often to Listen to Podcasts

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Smartphone/Tablet/Portable Device</th>
<th>Computer</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>62</td>
<td>36</td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>79</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>2019</td>
<td>75</td>
<td>19</td>
<td>4</td>
</tr>
<tr>
<td>2020</td>
<td>85</td>
<td>11</td>
<td>3</td>
</tr>
</tbody>
</table>
Frequency of Listening to Podcasts

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

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

- Every day: 20%
- At least once a week: 24%
- Several times a month: 14%
- At least once a month: 14%
- Less than once a month: 28%
“Think about the audio podcast episodes you listen to. Do you typically listen to...?”

- The entire podcast: 57%
- Most of the podcast: 34%
- Less than half the podcast: 9%

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

- Within 24 hours of downloading: 50%
- Within 48 hours: 19%
- Within a week: 25%
- Longer than a week: 6%
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
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

<table>
<thead>
<tr>
<th>Year</th>
<th>Hours:Minutes</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>9:09</td>
</tr>
<tr>
<td>2018</td>
<td>10:04</td>
</tr>
<tr>
<td>2019</td>
<td>11:06</td>
</tr>
<tr>
<td>2020</td>
<td>12:37</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Device Type</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smartphone</td>
<td>72</td>
<td>74</td>
<td>75</td>
<td>83</td>
</tr>
<tr>
<td>Desktop/Laptop</td>
<td>50</td>
<td>34</td>
<td>41</td>
<td>41</td>
</tr>
<tr>
<td>Tablet</td>
<td>18</td>
<td>25</td>
<td>18</td>
<td>21</td>
</tr>
<tr>
<td>Smart Speaker</td>
<td>8</td>
<td>14</td>
<td>16</td>
<td>13</td>
</tr>
<tr>
<td>SmartTV/TV Device</td>
<td>10</td>
<td>12</td>
<td>16</td>
<td>13</td>
</tr>
</tbody>
</table>

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Smart Speakers
Smart Speaker Awareness

% AWARE OF ANY SMART SPEAKER BRAND

Germany, South Africa major metro commercial, U.S., Australia, and Canada populations age 18+

- Germany: 65% (2019)
- South Africa: 23% (2019)
- U.S.: 80% (2020)
- Australia: 85% (2020)
- Canada: 77% (2020)

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Smart Speaker Ownership

TOTAL AUSTRALIAN POPULATION 12+
% OWNING A SMART SPEAKER BRAND

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>5</td>
<td>13</td>
<td>17</td>
</tr>
</tbody>
</table>
Smart Speaker Ownership

POPULATIONS 12+
% OWNING A SMART SPEAKER

U.S. 2017: 7%
U.S. 2018: 18%
U.S. 2019: 23%
U.S. 2020: 27%
Aus 2020: 17%
Smart Speaker Ownership

Germany, South Africa major metro commercial, U.S., Australia, and Canada populations age 18+
% own any smart speaker brand

- Germany 2019: 8%
- South Africa 2019: 12%
- U.S. 2020: 24%
- Australia 2020: 17%
- Canada 2020: 26%
Smart Speaker Ownership

TOTAL AUSTRALIAN POPULATION 12+

% OWNING SMART SPEAKER BRAND

- **Google Home**
  - 2018: 3%
  - 2019: 10%
  - 2020: 14%

- **Amazon Alexa**
  - 2018: 1%
  - 2019: 1%
  - 2020: < 1%

- **Apple HomePod**
  - 2018: 1%
  - 2019: 1%
  - 2020: < 1%

- **Sonos One with Alexa**
  - 2018: 1%
  - 2019: 1%
  - 2020: 1%

- **JBL Link with Google**
  - 2018: 1%
  - 2019: 1%
  - 2020: 1%
Number of Smart Speakers in Household

BASE: AUSTRALIAN AGE 12+ SMART SPEAKER OWNERS

<table>
<thead>
<tr>
<th>Year</th>
<th>One</th>
<th>Two</th>
<th>Three or More</th>
<th>Mean # of Smart Speakers</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>74</td>
<td>16</td>
<td>10</td>
<td>1.4</td>
</tr>
<tr>
<td>2020</td>
<td>56</td>
<td>31</td>
<td>13</td>
<td>1.7</td>
</tr>
</tbody>
</table>
### Number of Smart Speakers in Household

**BASE: AGE 12+ SMART SPEAKER OWNERS**

<table>
<thead>
<tr>
<th></th>
<th>ONE</th>
<th>TWO</th>
<th>THREE OR MORE</th>
<th>MEAN # OF SMART SPEAKERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aus 2020</td>
<td>56</td>
<td>31</td>
<td>13</td>
<td>1.7</td>
</tr>
<tr>
<td>U.S. 2020</td>
<td>45</td>
<td>23</td>
<td>32</td>
<td>2.2</td>
</tr>
</tbody>
</table>
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?”

- Same Amount: 39%
- More: 21%
- Less: 36%
- Don’t Know: 4%
Online Audio Streaming Services
Awareness of Online Audio Streaming Services

TOTAL AUSTRALIAN POPULATION 12+

% AWARE OF ONLINE AUDIO STREAMING SERVICE

- **Spotify**
  - 2017: 73%
  - 2018: 77%
  - 2019: 85%
  - 2020: 88%

- **Apple Music**
  - 2017: 72%
  - 2018: 75%
  - 2019: 83%
  - 2020: 88%

- **Google Play Music**
  - 2017: 36%
  - 2018: 35%
  - 2019: 63%
  - 2020: 63%

- **SoundCloud**
  - 2017: 42%
  - 2018: 46%

- **Amazon Music**
  - 2017: 37%
  - 2018: 45%
  - 2019: 48%

- **Tidal**
  - 2017: 10%
  - 2018: 10%
  - 2019: 10%

- **Deezer**
  - 2017: 5%
  - 2018: 6%

*2017-2018: GOOGLE PLAY ALL ACCESS*

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### Awareness of Online Audio Streaming Services

**Populations 12+**

<table>
<thead>
<tr>
<th>Service</th>
<th>Aus 2020</th>
<th>U.S. 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spotify</td>
<td>88</td>
<td>72</td>
</tr>
<tr>
<td>Apple Music</td>
<td>88</td>
<td>71</td>
</tr>
<tr>
<td>Google Play Music</td>
<td>63</td>
<td>63</td>
</tr>
<tr>
<td>SoundCloud</td>
<td>46</td>
<td></td>
</tr>
<tr>
<td>Amazon Music</td>
<td>45</td>
<td>68</td>
</tr>
<tr>
<td>Tidal</td>
<td>10</td>
<td>12</td>
</tr>
<tr>
<td>Deezer</td>
<td>6</td>
<td>7</td>
</tr>
</tbody>
</table>
Listened to Online Audio Streaming Services in Last Month

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO ONLINE AUDIO STREAMING SERVICE IN LAST MONTH

- **Spotify**
  - 2017: 7%
  - 2018: 8%
  - 2019: 9%
  - 2020: 10%

- **Apple Music**
  - 2017: 26%
  - 2018: 30%
  - 2019: 40%
  - 2020: 44%

- **SoundCloud**
  - 2017: 5%
  - 2018: 6%
  - 2019: 5%
  - 2020: 5%

- **Google Play Music***
  - 2017-2018: <=1%
  - 2019: 3%
  - 2020: 3%

- **Amazon Music**
  - 2017-2020: <1%

*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**

<table>
<thead>
<tr>
<th>Service</th>
<th>Use Only the Free Service</th>
<th>Pay for a Subscription</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spotify</td>
<td>40</td>
<td>60</td>
</tr>
<tr>
<td>Apple Music</td>
<td>35</td>
<td>65</td>
</tr>
<tr>
<td>SoundCloud</td>
<td>97</td>
<td>3</td>
</tr>
<tr>
<td>Google Play Music</td>
<td>60</td>
<td>40</td>
</tr>
</tbody>
</table>
Free vs. Paid Subscriptions to Spotify
BASE: AUSTRALIAN 12+ AND LISTENED TO SPOTIFY IN LAST MONTH

<table>
<thead>
<tr>
<th>Year</th>
<th>Use Only the Free Service</th>
<th>Pay for a Subscription</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>66</td>
<td>34</td>
</tr>
<tr>
<td>2018</td>
<td>58</td>
<td>42</td>
</tr>
<tr>
<td>2019</td>
<td>53</td>
<td>47</td>
</tr>
<tr>
<td>2020</td>
<td>40</td>
<td>60</td>
</tr>
</tbody>
</table>
Weekly Listening to Online Audio Streaming Services

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO ONLINE AUDIO STREAMING SERVICE IN LAST WEEK

Spotify
- 2017: 21%
- 2018: 26%
- 2019: 34%
- 2020: 40%

Apple Music
- 2017: 6%
- 2018: 7%
- 2019: 8%
- 2020: 7%

SoundCloud
- 2017: 5%
- 2018: 3%

Google Play Music*
- 2017: 2%
- 2018: 2%
- 2019: 4%
- 2020: 4%

Amazon Music
- 2017: 1%
- 2018: 1%

*T2017-2018: 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

- 2017: 44%
- 2018: 47%
- 2019: 48%
- 2020: 45%
Weekly YouTube Music Usage

POPULATIONS 12+
% USED YOUTUBE FOR MUSIC OR MUSIC VIDEOS IN LAST WEEK

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td></td>
<td>33</td>
<td>41</td>
<td>43</td>
<td>43</td>
<td>46</td>
<td>50</td>
<td>44</td>
<td>45</td>
</tr>
</tbody>
</table>
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
The Infinite Dial® 2020 Australia

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