The Infinite Dial 2022
Australia

#InfiniteDial
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
Online Audio
Monthly Online Audio Listening

TOTAL AUSTRALIAN POPULATION 12+
% LISTENED TO ONLINE AUDIO IN LAST MONTH

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>56</td>
</tr>
<tr>
<td>2018</td>
<td>53</td>
</tr>
<tr>
<td>2019</td>
<td>61</td>
</tr>
<tr>
<td>2020</td>
<td>67</td>
</tr>
<tr>
<td>2021</td>
<td>74</td>
</tr>
<tr>
<td>2022</td>
<td>78</td>
</tr>
</tbody>
</table>

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

#InfiniteDial
Weekly Online Audio Listening

TOTAL AUSTRALIAN POPULATION 12+
% LISTENED TO ONLINE AUDIO IN LAST WEEK

2017: 46
2018: 47
2019: 56
2020: 63
2021: 66
2022: 71

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

- **2017:** 9:09
- **2018:** 10:04
- **2019:** 11:06
- **2020:** 12:37
- **2021:** 12:11
- **2022:** 13:31

**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

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>83</td>
</tr>
<tr>
<td>2020</td>
<td>82</td>
</tr>
<tr>
<td>2021</td>
<td>80</td>
</tr>
<tr>
<td>2022</td>
<td>80</td>
</tr>
<tr>
<td>Source Used to Listen to Online AM/FM/DAB+ Radio</td>
<td>2021</td>
</tr>
<tr>
<td>-------------------------------------------------</td>
<td>------</td>
</tr>
<tr>
<td>Radio station's app</td>
<td>44</td>
</tr>
<tr>
<td>Radio station's website</td>
<td>46</td>
</tr>
<tr>
<td>Aggregator app/website</td>
<td>38</td>
</tr>
<tr>
<td>Smart speaker</td>
<td>23</td>
</tr>
</tbody>
</table>
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

2017: 7%
2018: 11%
2019: 16%
2020: 19%
2021: 25%
2022: 31%
Audio Sources Used in Car

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

% USING AUDIO SOURCE IN CAR

- AM/FM/DAB+ radio: 80%
- Online audio streaming services*: 39%
- Own music collection: 34%
- CD player: 34%
- Podcasts: 32%
- Online AM/FM stations: 16%

*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

- **AM/FM radio**: 80 (Aus 2022) 80 (U.S. 2022)
- **Online audio**: 43 (Aus 2022) 42 (U.S. 2022)
- **CD player**: 34 (Aus 2022) 34 (U.S. 2022)
- **Own music collection**: 35 (Aus 2022) 34 (U.S. 2022)
- **Podcasts**: 34 (Aus 2022) 32 (U.S. 2022)
- **SiriusXM**: 22 (U.S. 2022)
Podcasting
Podcasting Awareness

TOTAL AUSTRALIAN POPULATION 12+

% AWARE OF PODCASTING

- 2017: 72%
- 2018: 78%
- 2019: 83%
- 2020: 87%
- 2021: 91%
- 2022: 90%

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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

- U.S.
- Australia

<table>
<thead>
<tr>
<th>Year</th>
<th>U.S.</th>
<th>Australia</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>24%</td>
<td>17%</td>
</tr>
<tr>
<td>2018</td>
<td>26%</td>
<td>18%</td>
</tr>
<tr>
<td>2019</td>
<td>32%</td>
<td>22%</td>
</tr>
<tr>
<td>2020</td>
<td>37%</td>
<td>25%</td>
</tr>
<tr>
<td>2021</td>
<td>41%</td>
<td>37%</td>
</tr>
<tr>
<td>2022</td>
<td>38%</td>
<td>40%</td>
</tr>
</tbody>
</table>

#InfiniteDial
Weekly Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO A PODCAST IN LAST WEEK

2017: 10
2018: 13
2019: 15
2020: 17
2021: 26
2022: 26

#InfiniteDial
Weekly Podcast Listening

POPULATIONS 12+
% LISTENED TO A PODCAST IN LAST WEEK

U.S.          Australia

<table>
<thead>
<tr>
<th>Year</th>
<th>U.S.</th>
<th>Australia</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>15</td>
<td>10</td>
</tr>
<tr>
<td>2018</td>
<td>17</td>
<td>13</td>
</tr>
<tr>
<td>2019</td>
<td>22</td>
<td>15</td>
</tr>
<tr>
<td>2020</td>
<td>24</td>
<td>17</td>
</tr>
<tr>
<td>2021</td>
<td>28</td>
<td>26</td>
</tr>
<tr>
<td>2022</td>
<td>26</td>
<td>26</td>
</tr>
</tbody>
</table>
Podcast Listening Locations

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

% LISTENED TO A PODCAST IN LOCATION

- At home: 83%
- In a car/truck: 60%
- While walking around/on foot: 50%
- While riding public transportation: 29%
- At work: 27%
- At a gym/while working out: 19%
## Device Used Most Often to Listen to Podcasts

**Base: Australian 12+ and listened to podcast in last month**

<table>
<thead>
<tr>
<th>Year</th>
<th>Smartphone/Tablet/Portable Device</th>
<th>Computer</th>
<th>In-Car Entertainment System</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>69</td>
<td>31</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>80</td>
<td>19</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2019</td>
<td>79</td>
<td>16</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>2020</td>
<td>89</td>
<td>9</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>2021</td>
<td>73</td>
<td>15</td>
<td>8</td>
<td>4</td>
</tr>
<tr>
<td>2022</td>
<td>69</td>
<td>14</td>
<td>13</td>
<td>4</td>
</tr>
</tbody>
</table>
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%

- One: 12%
- Two: 16%
- Three: 13%
- Four or Five: 18%
- Six to Ten: 25%
- 11 or more: 15%

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

- 2017: 5:22
- 2018: 4:40
- 2019: 5:41
- 2020: 5:16
- 2021: 5:00
- 2022: 7:06
Smart Speakers
Smart Speaker Ownership

TOTAL AUSTRALIAN POPULATION 12+
% OWNING A SMART SPEAKER

- 2018: 5%
- 2019: 13%
- 2020: 17%
- 2021: 26%
- 2022: 28%
Smart Speaker Ownership

POPULATIONS 12+

% OWNING A SMART SPEAKER

<table>
<thead>
<tr>
<th>Year</th>
<th>U.S.</th>
<th>Australia</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>18</td>
<td>5</td>
</tr>
<tr>
<td>2019</td>
<td>23</td>
<td>13</td>
</tr>
<tr>
<td>2020</td>
<td>27</td>
<td>17</td>
</tr>
<tr>
<td>2021</td>
<td>33</td>
<td>26</td>
</tr>
<tr>
<td>2022</td>
<td>35</td>
<td>28</td>
</tr>
</tbody>
</table>
Smart Speaker Ownership

TOTAL AUSTRALIAN POPULATION 12+
% OWNING SMART SPEAKER BRAND

- Google Nest
  - 2019: 10
  - 2020: 14
  - 2021: 24
  - 2022: 23

- Amazon Alexa
  - 2019: 1
  - 2020: 1
  - 2021: 3
  - 2022: 5

- Apple HomePod
  - 2019: < 1%
  - 2020: 1
  - 2021: 1
  - 2022: 2
## Number of Smart Speakers in Household

**BASE: AUSTRALIAN 12+ WHO OWN A SMART SPEAKER**

<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>
<tr>
<td>2021</td>
<td>55</td>
<td>21</td>
<td>24</td>
<td>1.9</td>
</tr>
<tr>
<td>2022</td>
<td>51</td>
<td>25</td>
<td>24</td>
<td>2.0</td>
</tr>
</tbody>
</table>
Number of Smart Speakers in Household

**BASE: AGE 12+ WHO OWN A SMART SPEAKER**

<table>
<thead>
<tr>
<th></th>
<th>ONE</th>
<th>TWO</th>
<th>THREE OR MORE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aus 2022</td>
<td>51</td>
<td>25</td>
<td>24</td>
</tr>
<tr>
<td>U.S. 2022</td>
<td>41</td>
<td>26</td>
<td>33</td>
</tr>
</tbody>
</table>

Hong Kong 2022

2.0

U.S. 2022

2.4
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%

Base: Smart speaker owners
Smart speaker owners

Top Weekly Smart Speaker Requests:

- **Listen to audio**
  (Radio streaming, catch-up radio, podcasts, music streaming, etc.)
  - 84%

- **Get information**
  (Traffic, weather, general knowledge, etc.)
  - 81%

- **Utilities**
  (Alarm, calendar, to-do list, etc.)
  - 67%

- **Control other devices**
  - 55%

- **Shopping and services**
  - 47%

- **Games and entertainment**
  - 38%

Base: Own a smart speaker

% who request type of action in a typical week
Online Audio Streaming Services
Awareness of Online Audio Streaming Services

TOTAL AUSTRALIAN POPULATION 12+

% AWARE OF ONLINE AUDIO STREAMING SERVICE

<table>
<thead>
<tr>
<th>Service</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spotify</td>
<td>88</td>
<td>92</td>
<td>90</td>
</tr>
<tr>
<td>Apple Music</td>
<td>88</td>
<td>83</td>
<td>88</td>
</tr>
<tr>
<td>YouTube Music</td>
<td>81</td>
<td>80</td>
<td>80</td>
</tr>
<tr>
<td>Amazon Music</td>
<td>45</td>
<td>58</td>
<td>64</td>
</tr>
<tr>
<td>SoundCloud</td>
<td>46</td>
<td>51</td>
<td>51</td>
</tr>
</tbody>
</table>
### 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><strong>Spotify</strong></td>
<td>37</td>
<td>63</td>
</tr>
<tr>
<td><strong>YouTube Music</strong></td>
<td>73</td>
<td>27</td>
</tr>
<tr>
<td><strong>SoundCloud</strong></td>
<td>88</td>
<td>12</td>
</tr>
</tbody>
</table>

*Note: The streaming music service from YouTube.*
Weekly Listening to Online Audio Streaming Services

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO ONLINE AUDIO STREAMING SERVICE IN LAST WEEK

- Spotify: 2020 - 40%, 2021 - 42%, 2022 - 45%
- YouTube Music: 2020 - 15%, 2021 - 16%
- Apple Music: 2020 - 8%, 2021 - 7%
- SoundCloud: 2020 - 3%, 2021 - 3%, 2022 - 4%
- Amazon Music: 2020 - 1%, 2021 - 1%, 2022 - 1%
Weekly Listening to Online Audio Streaming Services

POPULATIONS 12+
% LISTENED TO ONLINE AUDIO STREAMING SERVICE IN LAST WEEK

- **Spotify**: Aus 2022 - 45%, U.S. 2022 - 31%
- **YouTube Music**: Aus 2022 - 15%, U.S. 2022 - 20%
- **Apple Music**: Aus 2022 - 8%, U.S. 2022 - 12%
- **SoundCloud**: Aus 2022 - 4%, U.S. 2022 - 4%
- **Amazon Music**: Aus 2022 - 1%, U.S. 2022 - 10%
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