Presentation Outline

- Study Overview & Methodology
- AM/FM/DAB+ Radio
- Radio: Live & On Demand
- Online Audio
- Smart Speakers
- Online Audio Streaming Services
- Podcasts
- In-Car Media
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
AM/FM/DAB+ RADIO
Listening to AM/FM/DAB+ Radio in the Last Week

Total Australian Population 12+

% Listened to AM/FM/DAB+ Radio in the Last Week

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>85</td>
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<tr>
<td>2018</td>
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<td>2019</td>
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<td>2020</td>
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<tr>
<td>2021</td>
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</tr>
<tr>
<td>2022</td>
<td>79</td>
</tr>
<tr>
<td>2023</td>
<td>79</td>
</tr>
</tbody>
</table>

Estimated
17 Million

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

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total 12+ Population</td>
<td>79</td>
</tr>
<tr>
<td>Age 12-34</td>
<td>76</td>
</tr>
<tr>
<td>Age 35-54</td>
<td>81</td>
</tr>
<tr>
<td>Age 55+</td>
<td>81</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>2017</td>
<td>82</td>
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<tr>
<td>2018</td>
<td>86</td>
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<tr>
<td>2019</td>
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<td>2020</td>
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<tr>
<td>2021</td>
<td>67</td>
</tr>
<tr>
<td>2022</td>
<td>69</td>
</tr>
<tr>
<td>2023</td>
<td>76</td>
</tr>
</tbody>
</table>

AM/FM/DAB+ RADIO INCLUDES BOTH OVER-THE-AIR AND ONLINE
Listening to AM/FM/DAB+ Radio in the Last Week

**TOTAL POPULATIONS**

% LISTENED TO AM/FM RADIO IN THE LAST WEEK

- **Canada 2022**
  - Age 18+
  - 62

- **NZ 2022**
  - Age 16+
  - 73

- **U.S. 2023**
  - Age 12+
  - 61

- **Aus 2023**
  - Age 12+
  - 79

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 Radio DAB+

<table>
<thead>
<tr>
<th>Year</th>
<th>AM/FM Radio</th>
<th>DAB+</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>88</td>
<td>16</td>
</tr>
<tr>
<td>2019</td>
<td>83</td>
<td>10</td>
</tr>
<tr>
<td>2020</td>
<td>81</td>
<td>10</td>
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<td>2021</td>
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<td>22</td>
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<tr>
<td>2022</td>
<td>79</td>
<td>18</td>
</tr>
<tr>
<td>2023</td>
<td>78</td>
<td>32</td>
</tr>
</tbody>
</table>

Estimated
17 Million

Estimated
7 Million

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

#InfiniteDial
THE INFINITE DIAL © 2023 EDISON RESEARCH
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 Radio**
- **DAB+**

<table>
<thead>
<tr>
<th>Year</th>
<th>AM/FM Radio</th>
<th>DAB+</th>
<th>Total Listeners</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>88</td>
<td>16</td>
<td>17 Million</td>
</tr>
<tr>
<td>2019</td>
<td>83</td>
<td>10</td>
<td>17 Million</td>
</tr>
<tr>
<td>2020</td>
<td>81</td>
<td>10</td>
<td>17 Million</td>
</tr>
<tr>
<td>2021</td>
<td>78</td>
<td>22</td>
<td>7 Million</td>
</tr>
<tr>
<td>2022</td>
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<td>18</td>
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</tr>
<tr>
<td>2023</td>
<td>78</td>
<td>32</td>
<td>Estimated 7 Million</td>
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</table>

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

#InfiniteDial
THE INFINITE DIAL © 2023 EDISON RESEARCH
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 Radio**
- **DAB+**

<table>
<thead>
<tr>
<th>Category</th>
<th>AM/FM Radio</th>
<th>DAB+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total 12+ Population</td>
<td>78</td>
<td>32</td>
</tr>
<tr>
<td>Age 12-34</td>
<td>75</td>
<td>40</td>
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<tr>
<td>Age 35-54</td>
<td>80</td>
<td>35</td>
</tr>
<tr>
<td>Age 55+</td>
<td>80</td>
<td>20</td>
</tr>
</tbody>
</table>

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

- Any AM/FM/DAB+: 79%
  - Estimated: 17 Million
- Over-the-air AM/FM/DAB+: 70%
  - Estimated: 16 Million
- Online AM/FM/DAB+: 14%
  - 2021: 15
  - 2022: 15
  - 2023: 27
  - Estimated: 6 Million
Listening to AM/FM/DAB+ Radio in the Last Week

TOTAL AUSTRALIAN POPULATION 12+

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

- Any AM/FM/DAB+: 79%
- Over-the-air AM/FM/DAB+: 70%
- Online AM/FM/DAB+: 14% (2021), 15% (2022), 27% (2023)

Estimated:
- 17 Million for Any AM/FM/DAB+
- 16 Million for Over-the-air AM/FM/DAB+
- 6 Million for Online AM/FM/DAB+

#InfiniteDial
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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:

- Radio station’s app: 70%
- Radio station’s website: 61%
- Aggregator app/website: 52%
- Smart speaker: 49%
Online Listening to AM/FM/DAB+ Radio in the Last Week

TOTAL POPULATIONS

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

<table>
<thead>
<tr>
<th>Country</th>
<th>Age</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada 2022</td>
<td>Age 18+</td>
<td>20%</td>
</tr>
<tr>
<td>NZ 2022</td>
<td>Age 16+</td>
<td>23%</td>
</tr>
<tr>
<td>U.S. 2023</td>
<td>Age 12+</td>
<td>12%</td>
</tr>
<tr>
<td>Aus 2023</td>
<td>Age 12+ (includes DAB+ radio)</td>
<td>27%</td>
</tr>
</tbody>
</table>
Online Audio
Monthly Online Audio Listening

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO ONLINE AUDIO IN LAST MONTH

- 2017: 56%
- 2018: 53%
- 2019: 61%
- 2020: 67%
- 2021: 74%
- 2022: 78%
- 2023: 81%

Estimated
18 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
Monthly Online Audio Listening

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

- **Canada 2022**
  - Age 18+: 73

- **NZ 2022**
  - Age 16+: 77

- **U.S. 2023**
  - Age 12+: 75

- **Aus 2023**
  - Age 12+: 81

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

Canada 2022
Age 18+
73

NZ 2022
Age 16+
77

U.S. 2023
Age 12+
75

Aus 2023
Age 12+
81

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
Weekly Online Audio Listening

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

- Total 12+ Population: 74
- Age 12-34: 89
- Age 35-54: 78
- Age 55+: 52

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

- AM/FM/DAB+ radio: 84% (2023), 80% (2022), 84% (2021)
- Online audio streaming services*: 41% (2023), 39% (2022), 39% (2021)
- Podcasts: 38% (2023), 32% (2022)
- Own music collection: 41% (2023), 35% (2022)
- CD player: 39% (2023), 34% (2022)
- Online AM/FM stations: 20% (2023), 16% (2022)

*SUCH AS SPOTIFY, YOUTUBE MUSIC, OR APPLE MUSIC
AM/FM/DAB+ Radio Usage in Car

BASE: HAVE DRIVEN/RIDDEN IN CAR IN LAST MONTH

% EVER USE AM/FM/DAB+ RADIO IN CAR

- **Canada 2022**
  - Age 18+
  - 70%

- **NZ 2022**
  - Age 16+
  - 81%

- **U.S. 2023**
  - Age 18+
  - 73%

- **Aus 2023**
  - Age 18+
  - (Includes DAB+ radio)
  - 84%
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
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

Canada 2022
Age 18+
27

NZ 2022
Age 16+
21

U.S. 2023
Age 18+
26

Aus 2023
Age 18+
36
Podcasting
Monthly Podcast Listening
TOTAL AUSTRALIAN POPULATION 12+
% LISTENED TO A PODCAST IN LAST MONTH

Estimated 9 Million
Monthly Podcast Listening

TOTAL POPULATIONS
% LISTENED TO A PODCAST IN LAST MONTH

- U.S.
- Australia
- New Zealand

<table>
<thead>
<tr>
<th>Year</th>
<th>U.S.</th>
<th>Australia</th>
<th>New Zealand</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>24</td>
<td>17</td>
<td>17</td>
</tr>
<tr>
<td>2018</td>
<td>26</td>
<td>18</td>
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</tr>
<tr>
<td>2019</td>
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<td>2020</td>
<td>37</td>
<td>25</td>
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<tr>
<td>2021</td>
<td>41</td>
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</tr>
<tr>
<td>2022</td>
<td>38</td>
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<td>39</td>
</tr>
<tr>
<td>2023</td>
<td>42</td>
<td>43</td>
<td>43</td>
</tr>
</tbody>
</table>
Monthly Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO A PODCAST IN LAST MONTH

- Total 12+ Population: 43
- Age 12-17: 46
- Age 18-24: 70
- Age 25-39: 56
- Age 40-54: 44
- Age 55-64: 31
- Age 65+: 17
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
2023: Estimated 33

7 Million
Weekly Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO A PODCAST IN LAST WEEK

- Total 12+ Population: 33%
- Age 12-17: 36%
- Age 18-24: 54%
- Age 25-39: 48%
- Age 40-54: 33%
- Age 55-64: 21%
- Age 65+: 12%
Weekly Podcast Listening

TOTAL POPULATIONS
% LISTENED TO A PODCAST IN LAST WEEK

- **Canada 2022**
  - Age 18+
  - 26%

- **NZ 2022**
  - Age 16+
  - 30%

- **U.S. 2023**
  - Age 12+
  - 31%

- **Aus 2023**
  - Age 12+
  - 33%
Weekly Podcast Listening

TOTAL POPULATIONS
% 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>
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<tr>
<td>2018</td>
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<tr>
<td>2022</td>
<td>26</td>
<td>26</td>
</tr>
<tr>
<td>2023</td>
<td>31</td>
<td>33</td>
</tr>
</tbody>
</table>
Number of Podcast Episodes Listened to in Last Week

Base: Australians age 12+ and listened to podcast in last week; 33%

- Two: 21%
- Three: 14%
- Four or Five: 23%
- Six to Ten: 18%
- 11 or more: 9%
- One: 14%

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

- At home: 87%
- In a car/truck: 64%
- While walking around/on foot: 54%
- While riding public transportation: 40%
- At work: 33%
- At a gym/while working out: 29%
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

- Spotify: 66%
- YouTube: 61%
- Apple Podcasts app: 41%
- Podcast’s own mobile app: 29%
Service Used Most Often to Listen to Podcasts

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

- Spotify: 34%
- YouTube: 24%
- Apple Podcasts app: 11%
- Podcast's mobile app: 5%
- Podcast's website: 6%
- Other: 20%
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

Listen to audio-only podcasts: 86%
Listen to podcasts with video that you actively watch: 51%
Listen to podcasts with video that you minimize/play in background: 43%

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?”

- Never: 35%
- Less than once per month: 19%
- At least once per month: 7%
- Several times per month: 10%
- At least once per week: 18%
- Every day: 11%
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

<table>
<thead>
<tr>
<th>Year</th>
<th>Original Content</th>
<th>Catch-up Radio</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>18</td>
<td>10</td>
</tr>
<tr>
<td>2020</td>
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<td>2022</td>
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<td>16</td>
</tr>
<tr>
<td>2023</td>
<td>43</td>
<td>27</td>
</tr>
</tbody>
</table>
Online Audio Streaming Services
Weekly Listening to Online Audio Streaming Services

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO ONLINE AUDIO STREAMING SERVICE IN LAST WEEK

- **Spotify**: 42% (2021), 45% (2023)
- **YouTube Music**: 15% (2021), 16% (2022), 22% (2023)
- **Apple Music**: 7% (2021), 9% (2022)
- **SoundCloud**: 4% (2021), 3% (2022), 4% (2023)
- **Amazon Music**: 1% (2021), 1% (2022), 3% (2023)

*ASKED AS: “YOUTUBE MUSIC, THE STREAMING MUSIC SERVICE FROM YOUTUBE”*
Free vs. Paid Subscriptions to Spotify

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

- Pay for a subscription: 62%
- Use only free service: 31%
- Listen to someone else’s account: 5%
- Use free trial subscription: 2%

3 in 10 weekly Spotify listeners can be reached by advertising on Spotify
Weekly Listening to Ad-Supported Audio

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO AUDIO SOURCE IN THE LAST WEEK

Estimated
3 Million

12

Ad-supported
Spotify
Weekly Listening to Ad-Supported Audio

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

Estimated
6 Million

3 Million

12

Ad-supported
Spotify

27

Online
AM/FM/DAB+ radio
Weekly Listening to Ad-Supported Audio

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

Estimated
6 Million

12
Ad-supported
Spotify

27
Online
AM/FM/DAB+ radio

44
Any ad-supported
online audio services

Estimated
10 Million
Weekly Listening to Ad-Supported Audio

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

- Estimated 17 Million
  - Any AM/FM/DAB+ radio
  - 79

- Estimated 10 Million
  - Any ad-supported online audio services
  - 44

- Estimated 6 Million
  - Online AM/FM/DAB+ radio
  - 27

- Estimated 3 Million
  - Ad-supported Spotify
  - 12
TikTok Weekly Usage

TOTAL AUSTRALIAN POPULATION 12+

% USED TIKTOK IN THE LAST WEEK

27

Total 12+ Population
TikTok Weekly Usage
TOTAL AUSTRALIAN POPULATION 12+
% USED TIKTOK IN THE LAST WEEK

- Total 12+ Population: 27%
- Age 12-34: 50%
- Age 35-54: 21%
- Age 55+: 6%
Smart Speakers
Smart Speaker Ownership

TOTAL AUSTRALIAN POPULATION 12+

% owning a smart speaker

- 5% in 2018
- 13% in 2019
- 17% in 2020
- 26% in 2021
- 28% in 2022
- 6 Million

Estimated

2023
Smart Speaker Ownership

TOTAL AUSTRALIAN POPULATION 12+

% OWNING SMART SPEAKER BRAND

- **Google Nest**
  - 2021: 24%
  - 2022: 23%
  - 2023: 23%

- **Amazon Alexa**
  - 2021: 3%
  - 2022: 5%
  - 2023: 6%

- **Apple HomePod**
  - 2021: 1%
  - 2022: 2%
  - 2023: 1%
Smart Speaker Ownership

TOTAL POPULATIONS

% OWNING A SMART SPEAKER

Canada 2022
Age 18+

NZ 2022
Age 16+

U.S. 2023
Age 12+

Aus 2023
Age 12+

30

20

36

28
Number of Smart Speakers in Household

BASE: AGE 12+ WHO OWN A SMART SPEAKER

Aus 2023
- One: 58
- Two: 20
- Three or More: 22
Total: 1.9

U.S. 2023
- One: 43
- Two: 20
- Three or More: 38
Total: 2.8
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
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.
The Infinite Dial 2023
Australia