

 THE INFINITE DIAL® 2019

The Infinite Dial® South Africa



#InfiniteDial

THE INFINITE DIAL © 2019 EDISON RESEARCH

Study Overview

- ▶ The Infinite Dial is the longest-running survey of digital media consumer behavior in America
- ▶ The Infinite Dial South Africa 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 premier Infinite Dial South Africa report explores the penetration of online digital audio and social media in South Africa, as well as the online platforms and technologies that South Africans are using
- ▶ This study is designed to allow for direct comparisons between the South African and U.S. markets

Study Methodology

- ▶ In July of 2019, Edison Research conducted face-to-face interviews with 1,510 people aged 15 and older
- ▶ Sample population consists of those living within the major metro areas, covering the upper 2 of the 3 SEM Supergroups (or upper 3 of the 5 SEM Clusters), referred to hereafter as “Major Metro Commercial Population”
- ▶ Data weighted to reflect the gender, age, and race of this population

 THE INFINITE DIAL® 2019

Devices & Technologies



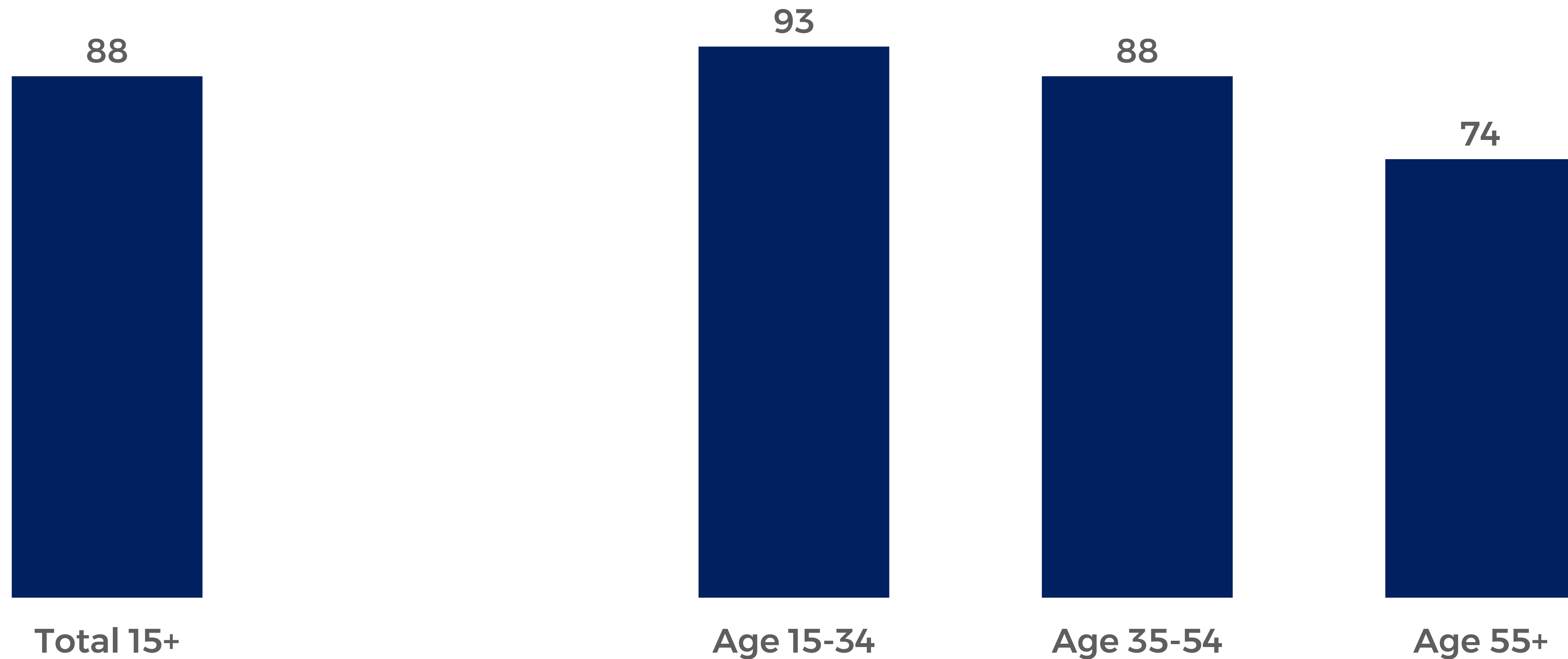
#InfiniteDial

THE INFINITE DIAL © 2019 EDISON RESEARCH

Smartphone Ownership in South Africa

TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)

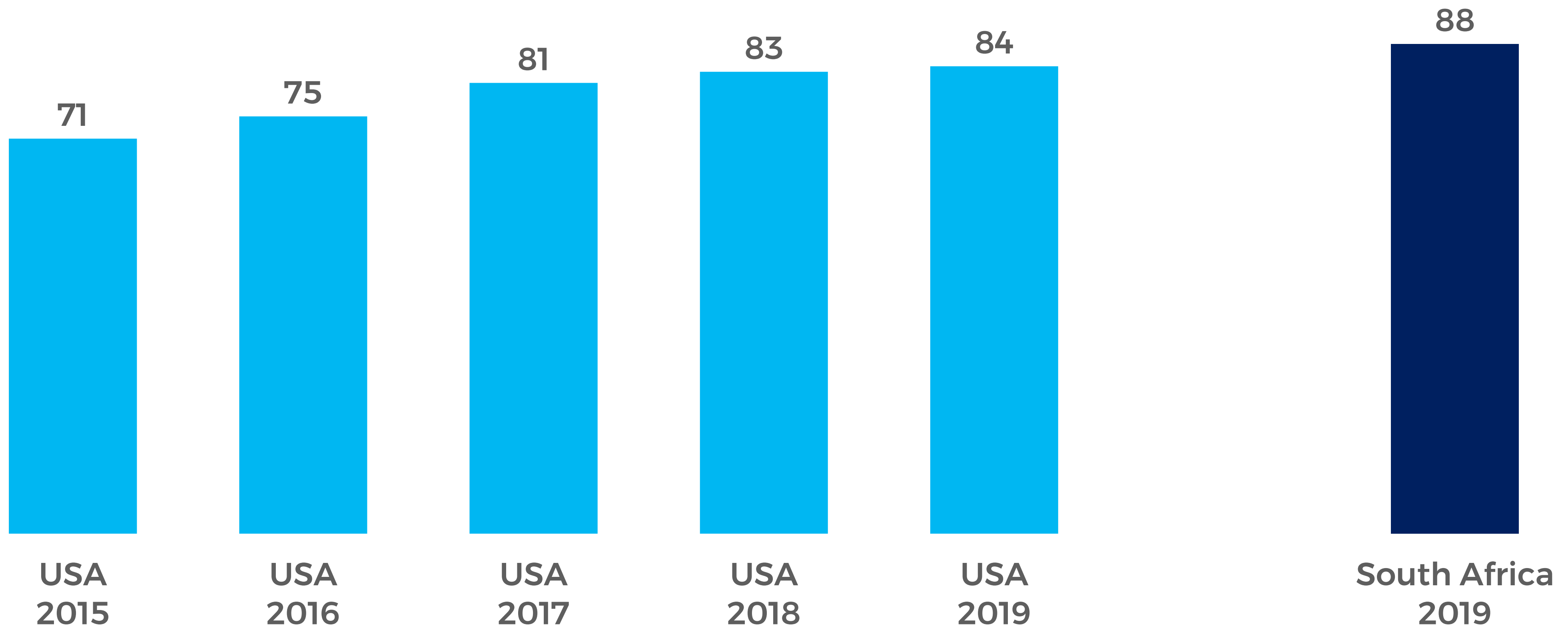
% OWNING A SMARTPHONE



Smartphone Ownership

USA TOTAL POPULATION 15+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+

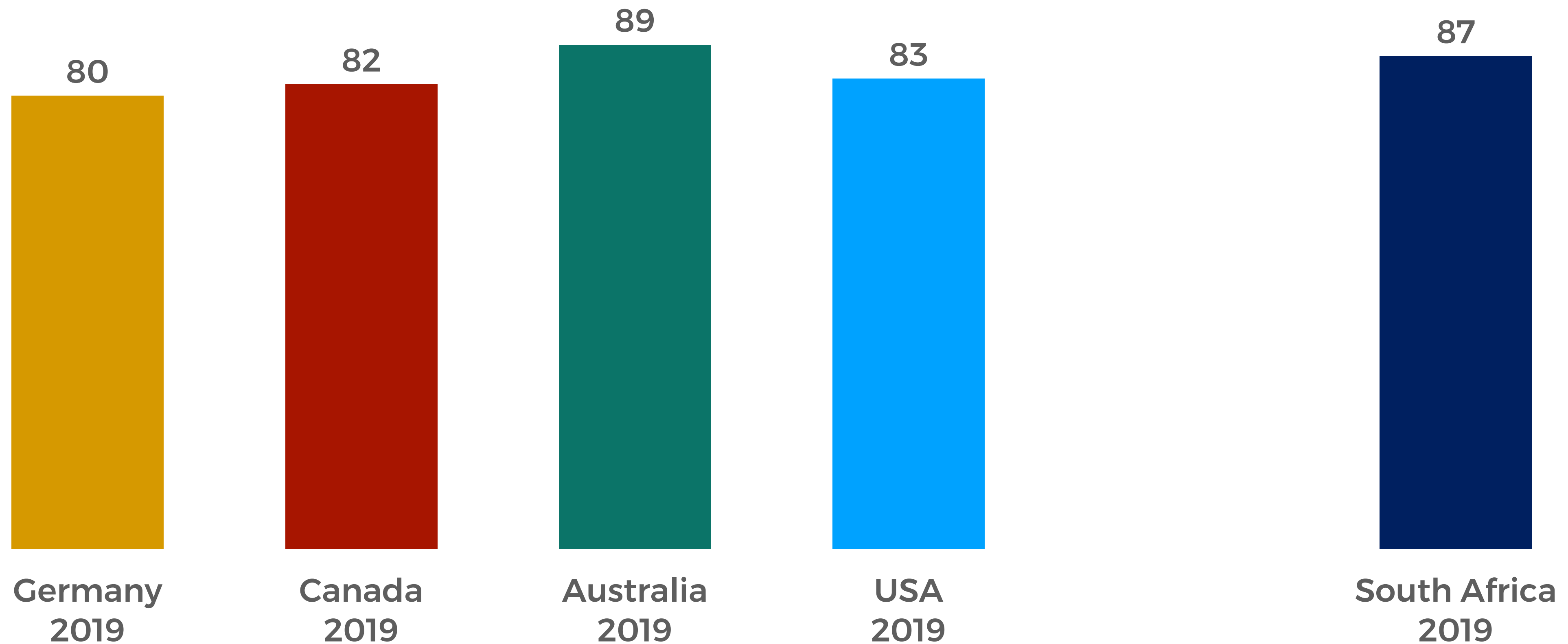
% OWNING A SMARTPHONE



Smartphone Ownership

GERMAN, CANADIAN, AUSTRALIAN, AND USA TOTAL POPULATIONS 18+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 18+

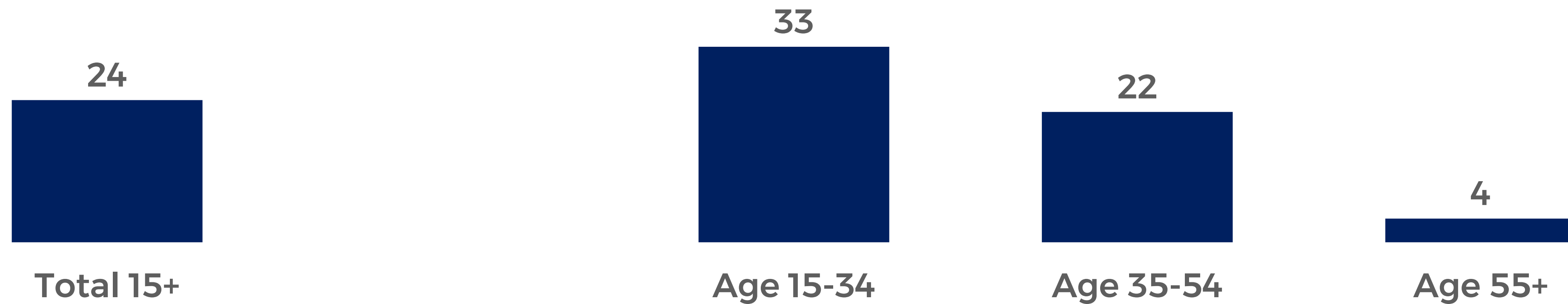
% OWNING A SMARTPHONE



Smart Speaker Awareness in South Africa

TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)

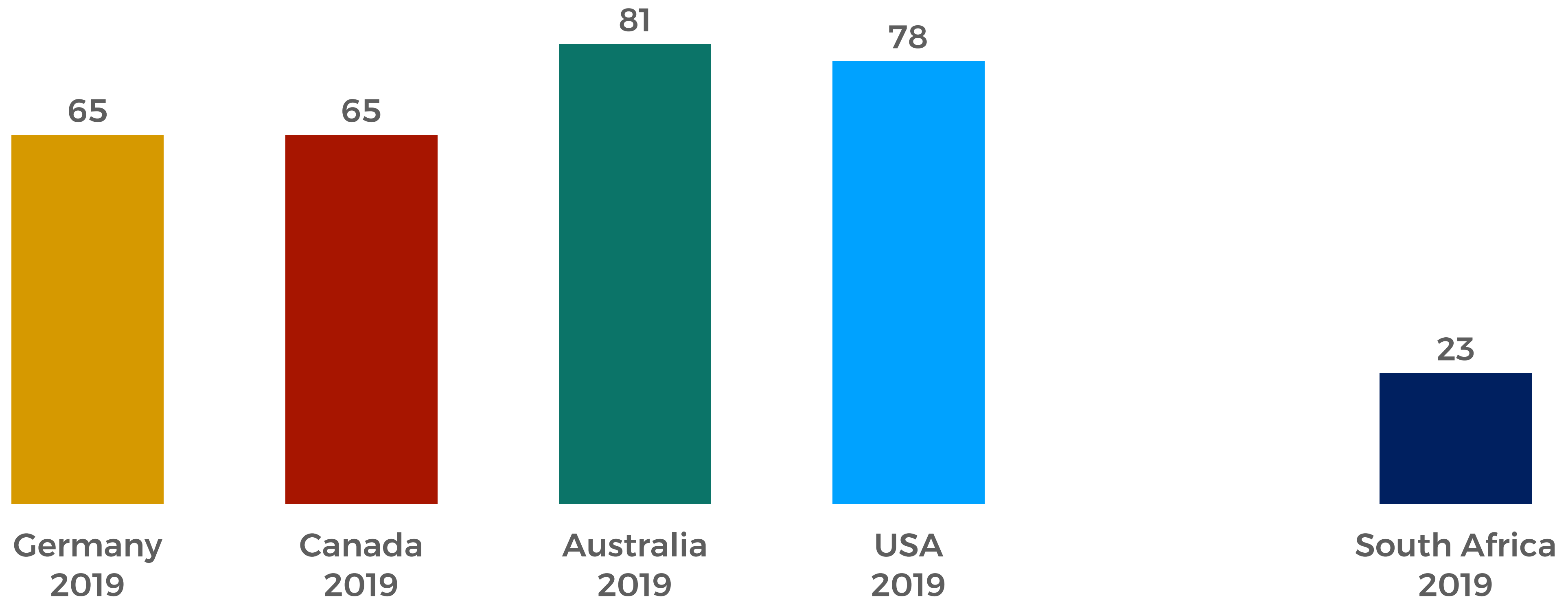
% AWARE OF ANY SMART SPEAKER BRAND



Smart Speaker Awareness

GERMAN, CANADIAN, AUSTRALIAN, AND USA TOTAL POPULATIONS 18+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 18+

% AWARE OF ANY SMART SPEAKER BRAND



 THE INFINITE DIAL® 2019

AM/FM Radio



#InfiniteDial

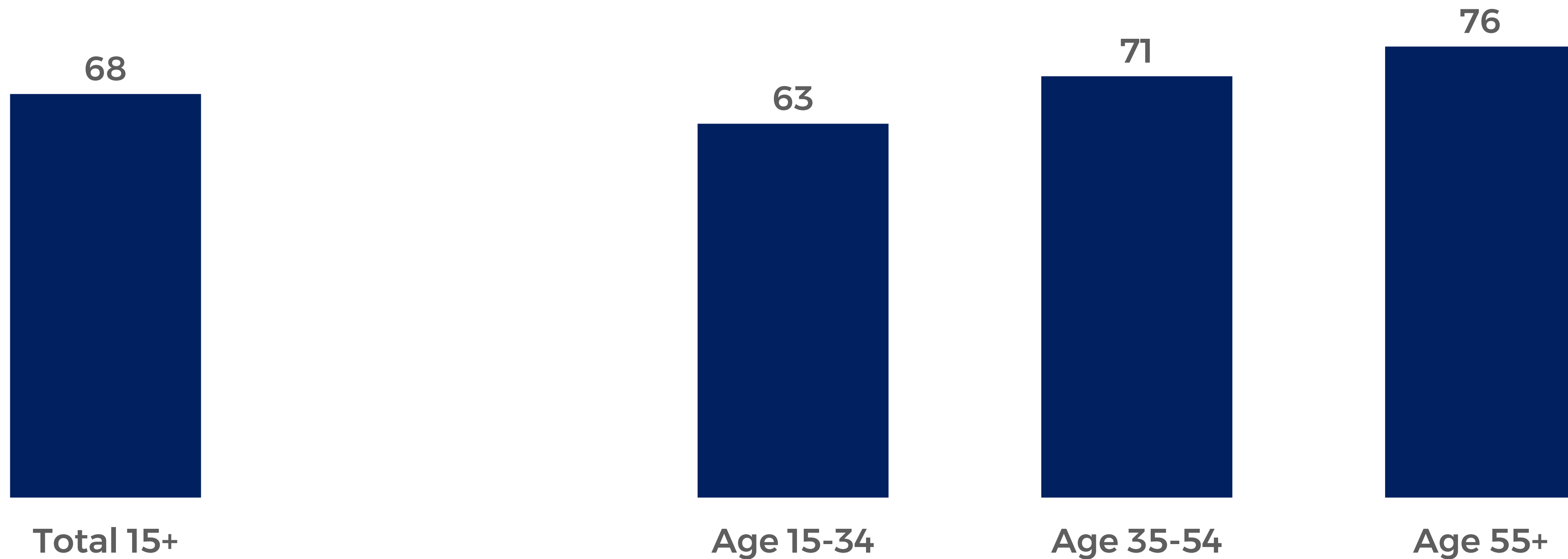
THE INFINITE DIAL © 2019 EDISON RESEARCH

Listening to AM/FM Radio in the Last Week in South Africa

TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)

% LISTENING TO AM/FM RADIO IN LAST WEEK

AM/FM RADIO INCLUDES OVER-THE-AIR, ONLINE, AND TELEVISION



Listening to AM/FM Radio in the Last Week

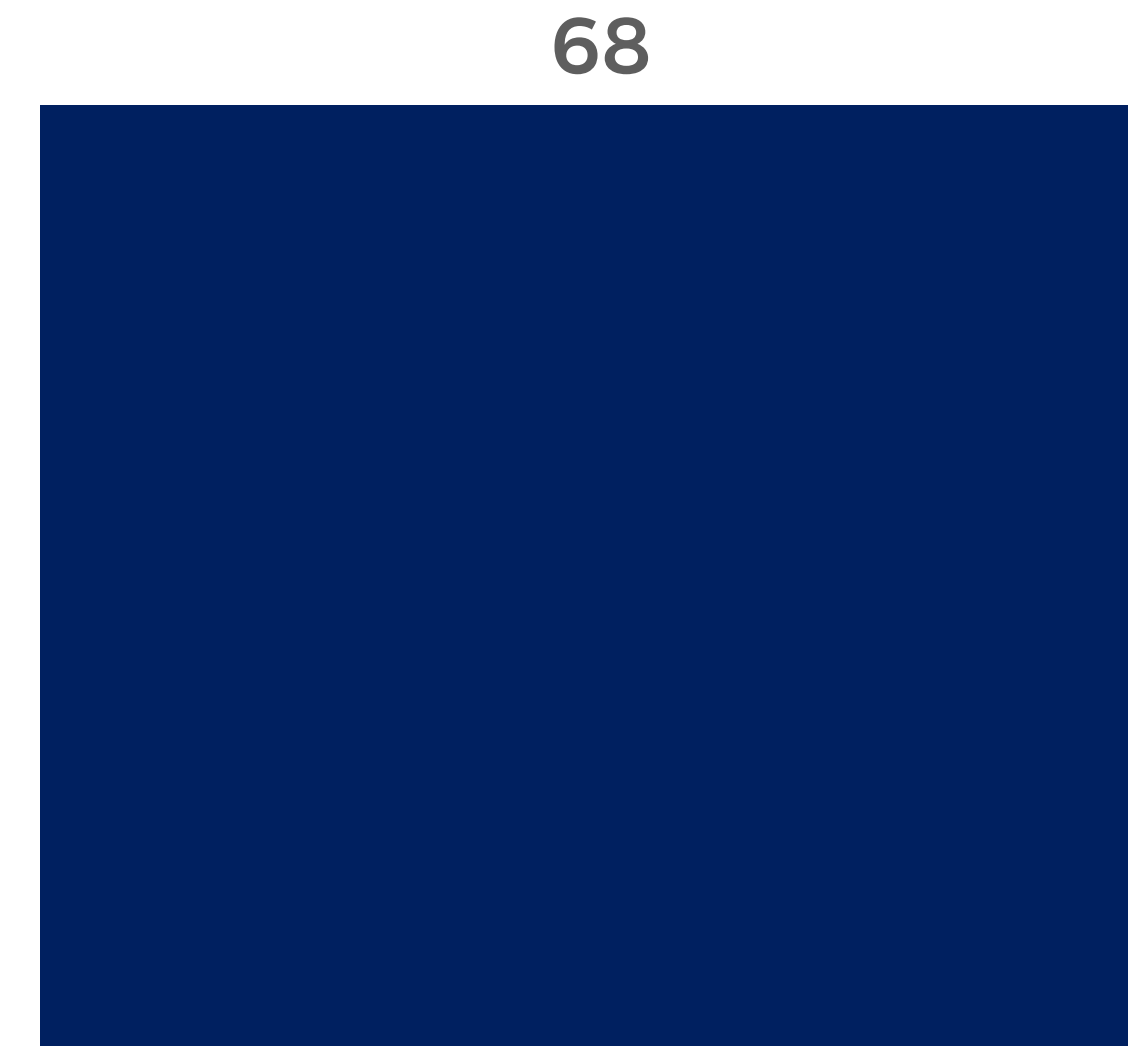
USA TOTAL POPULATION 15+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+

% LISTENING TO AM/FM RADIO IN LAST WEEK

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



USA 2019



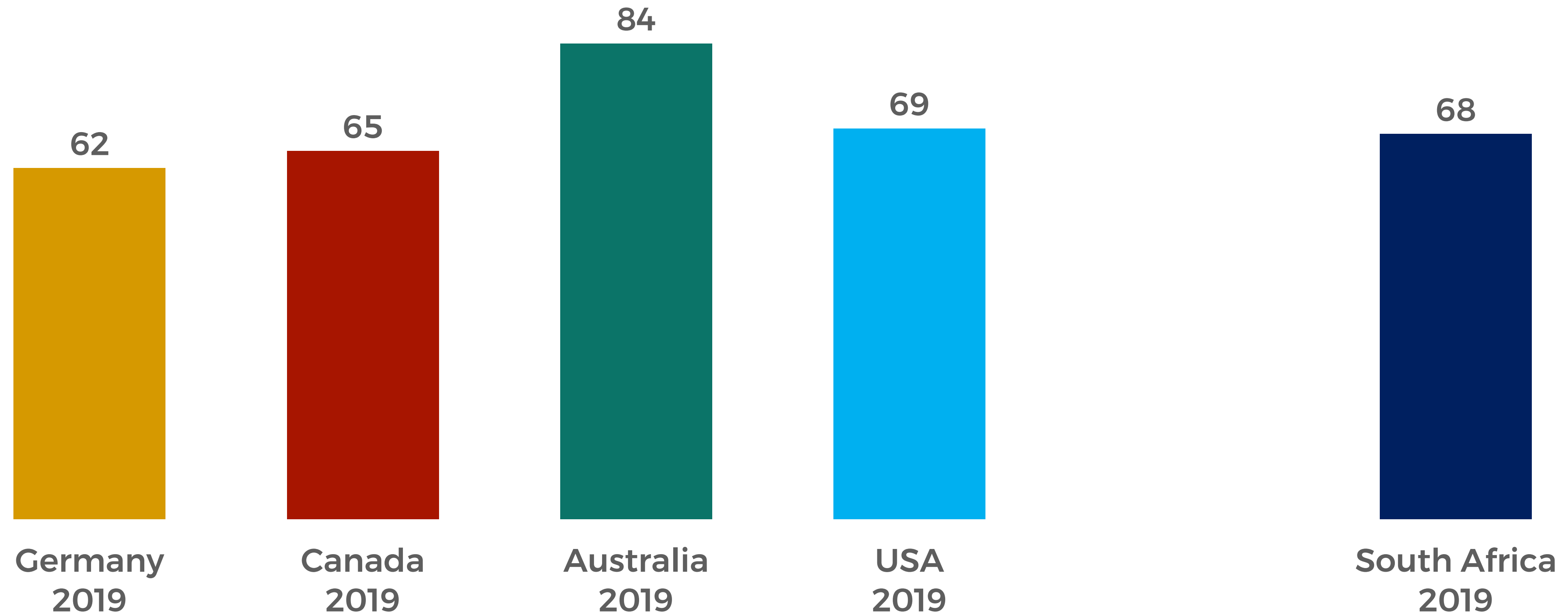
South Africa 2019

Listening to AM/FM Radio in the Last Week

GERMAN, CANADIAN, AUSTRALIAN, AND USA TOTAL POPULATIONS 18+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 18+

% LISTENING TO AM/FM RADIO IN LAST WEEK

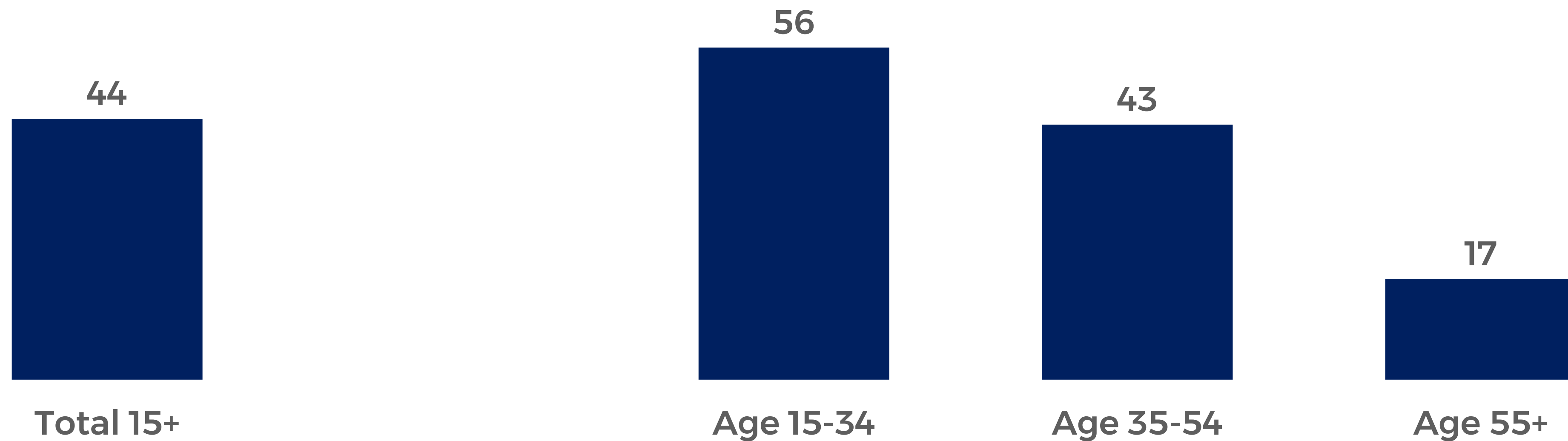
AM/FM RADIO INCLUDES BOTH OVER-THE-AIR AND ONLINE



Radio Listening at Home on Non-Radio Devices in South Africa

TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)

% LISTENING TO RADIO WHILE AT HOME USING A MOBILE PHONE, COMPUTER, OR TV



Radio Listening at Home on Non-Radio Devices in South Africa

AUSTRALIAN TOTAL POPULATIONS 18+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 18+

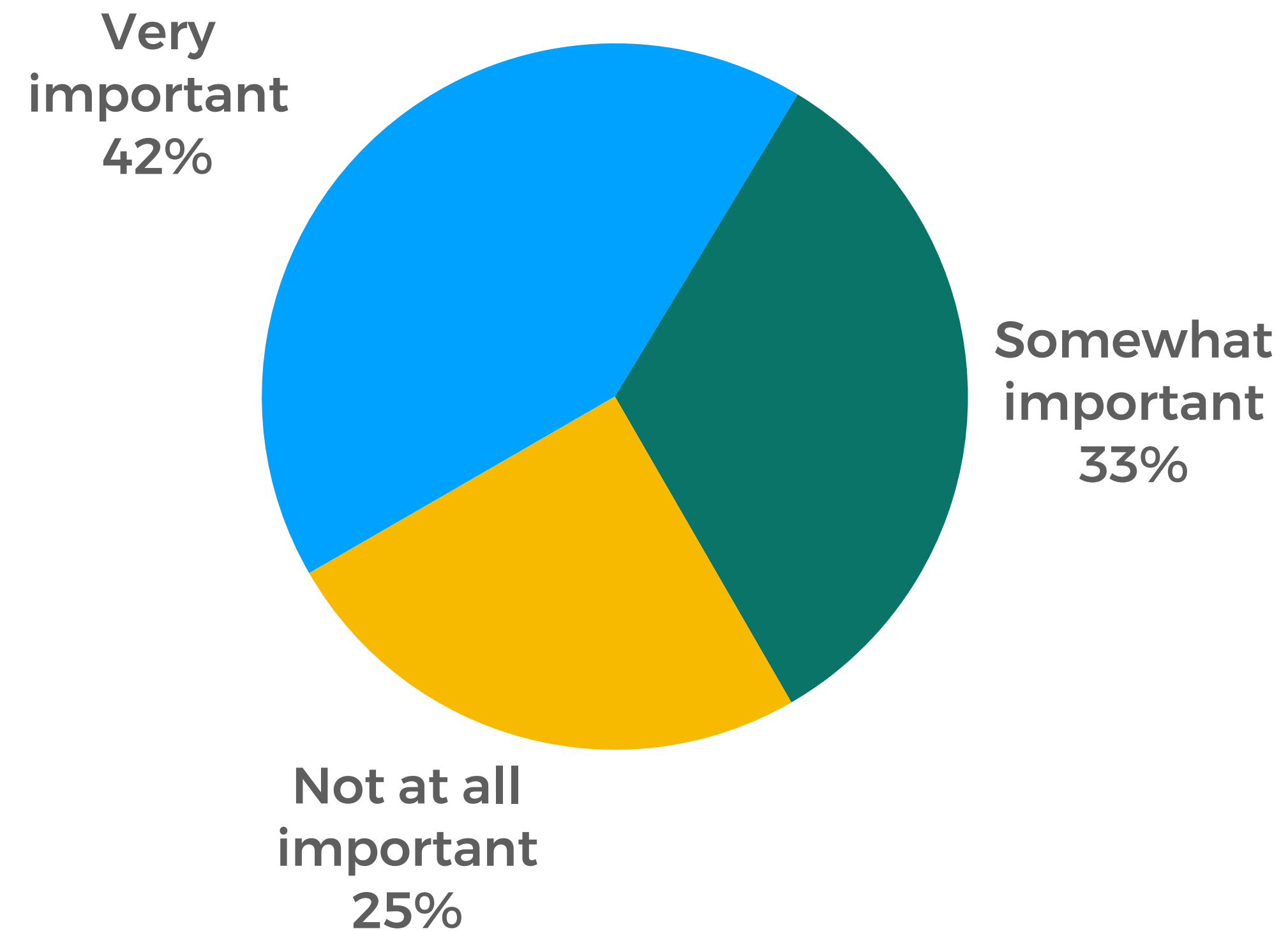
% LISTENING TO RADIO WHILE AT HOME USING A MOBILE PHONE, COMPUTER, OR TV



Importance of Keeping Up-To-Date with Music in South Africa

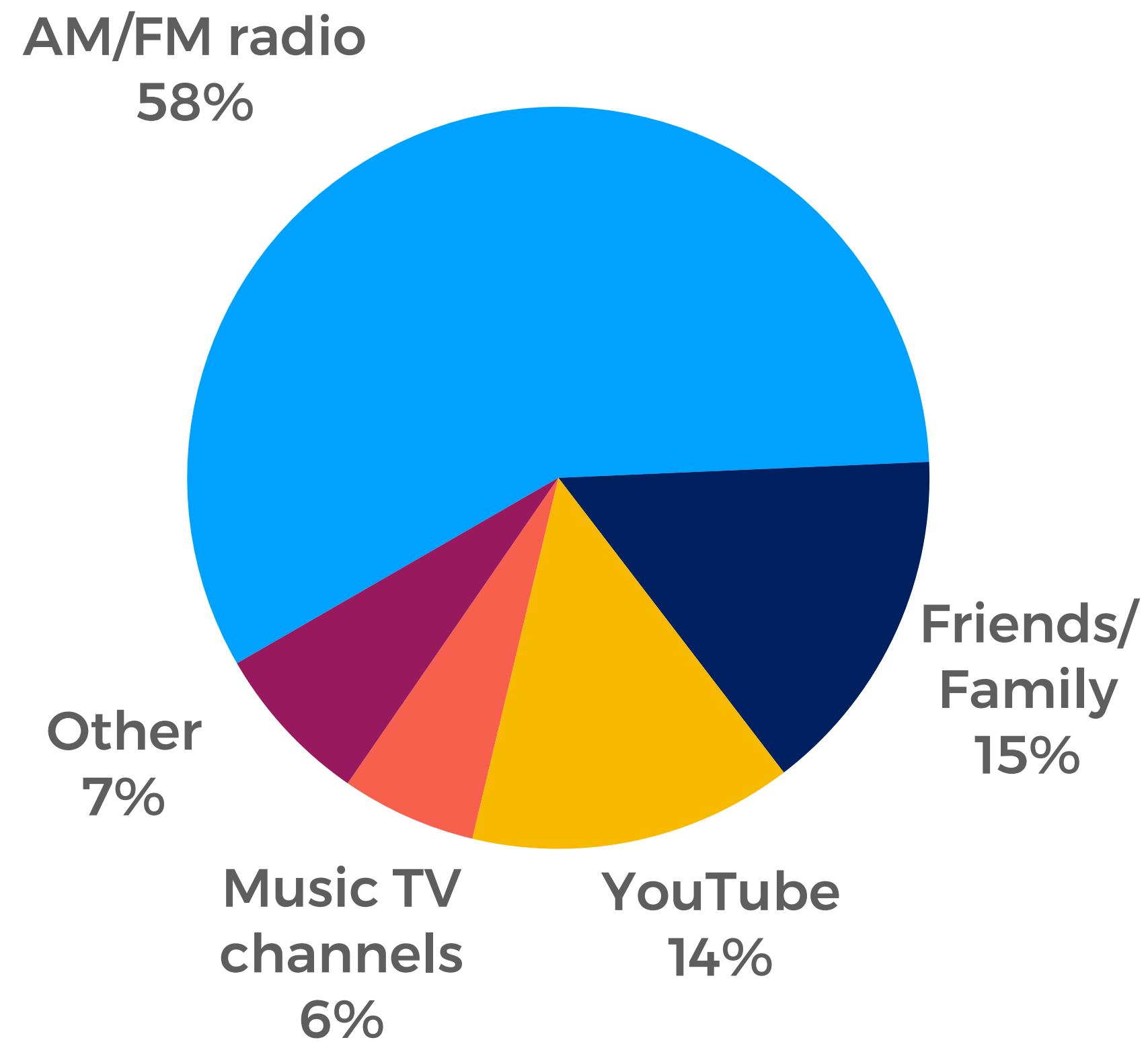
TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)

“How important is it to you to keep up-to-date with music?”



Sources Used Most Often to Learn about Music in South Africa

TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)



 THE INFINITE DIAL® 2019

Online Audio



#InfiniteDial

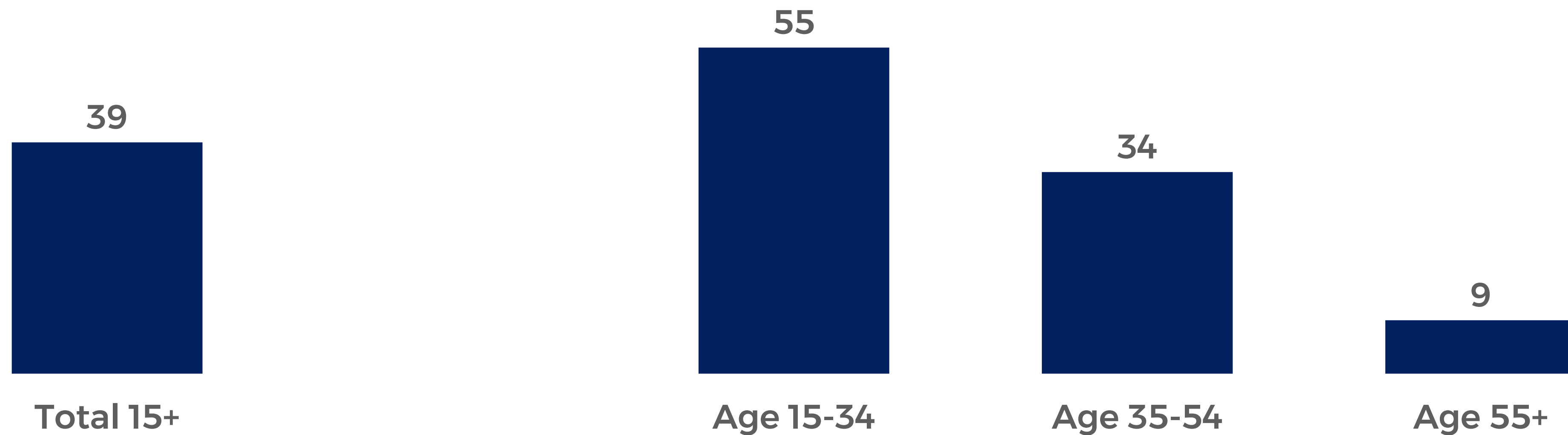
THE INFINITE DIAL © 2019 EDISON RESEARCH

Monthly Online Audio Listening in South Africa

TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)

% LISTENING TO ONLINE AUDIO IN LAST MONTH

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

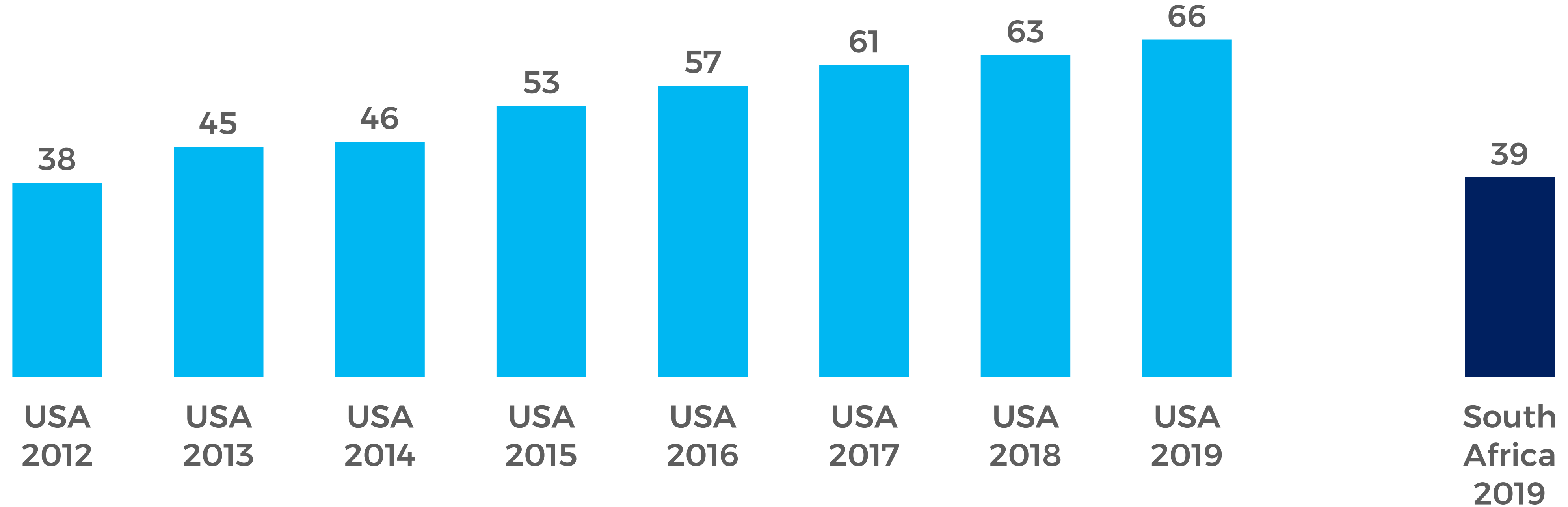


Monthly Online Audio Listening

USA TOTAL POPULATION 15+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+

% LISTENING TO ONLINE AUDIO IN LAST MONTH

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

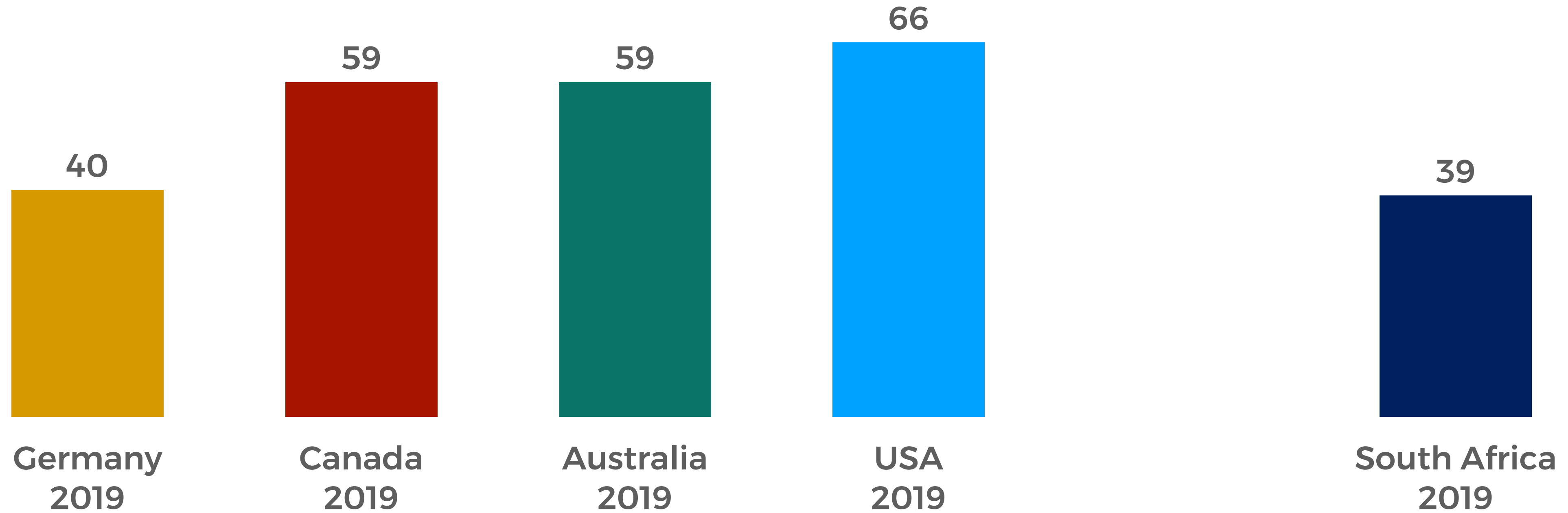


Monthly Online Audio Listening

GERMAN, CANADIAN, AUSTRALIAN, AND USA TOTAL POPULATIONS 18+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 18+

% LISTENING TO ONLINE AUDIO IN LAST MONTH

ONLINE AUDIO = LISTENING TO AM/AM/FM/DAB+ RADIO STATIONS ONLINE AND/OR LISTENING TO STREAMED AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET; DOES NOT INCLUDE YOUTUBE FOR MUSIC

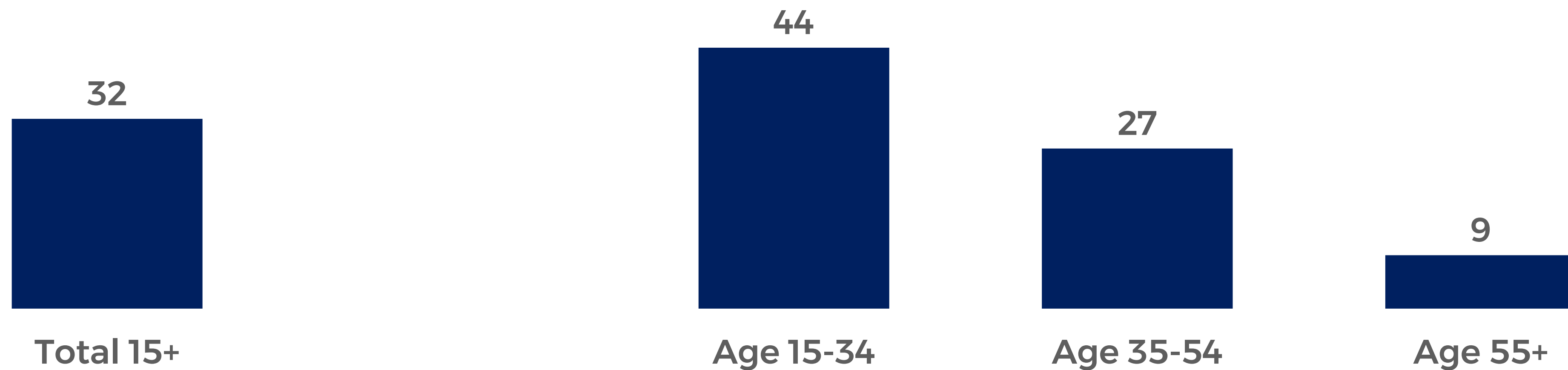


Weekly Online Audio Listening in South Africa

TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)

% LISTENING TO ONLINE AUDIO IN LAST WEEK

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

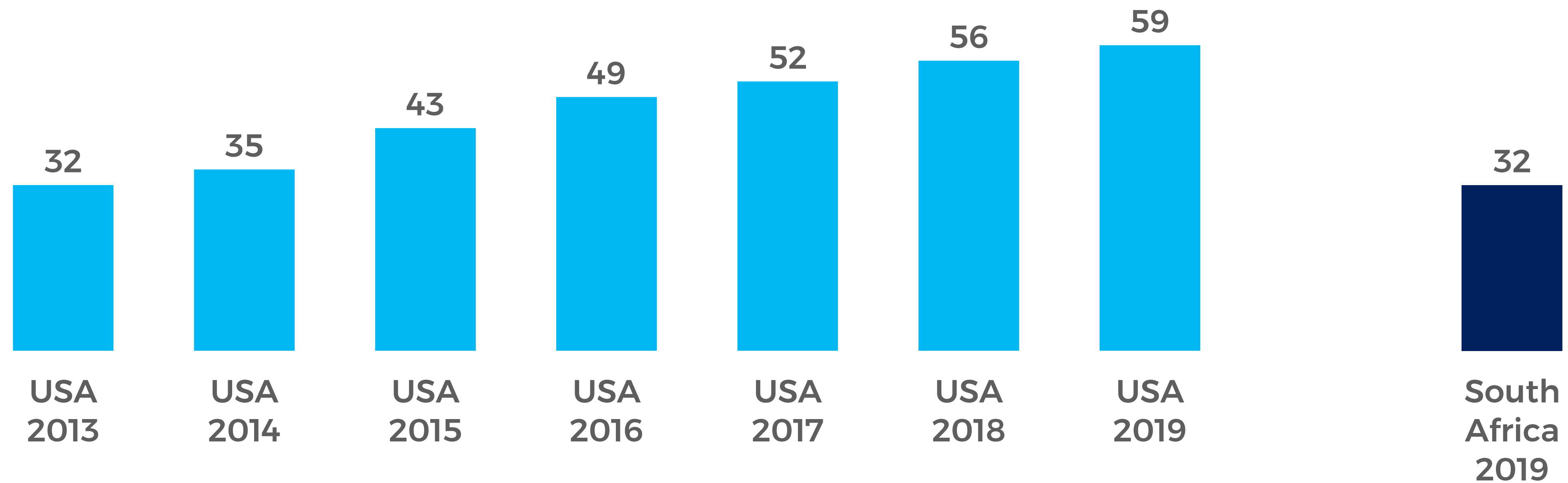


Weekly Online Audio Listening

USA TOTAL POPULATION 15+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+

% LISTENING TO ONLINE AUDIO IN LAST WEEK

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

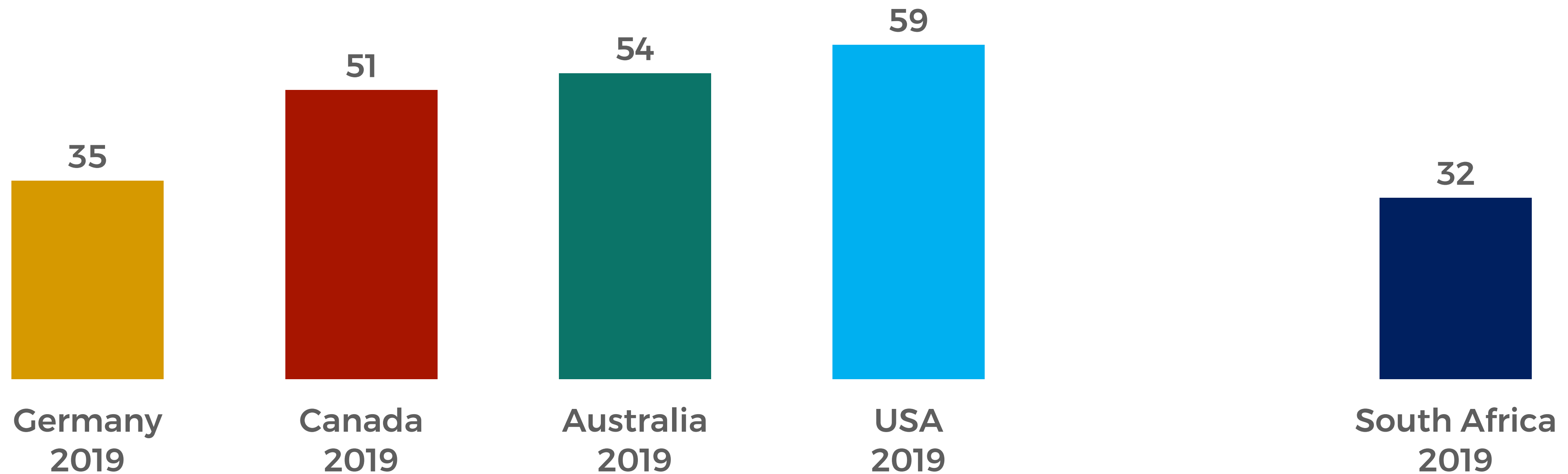


Weekly Online Audio Listening

GERMAN, CANADIAN, AUSTRALIAN, AND USA TOTAL POPULATIONS 18+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 18+

% LISTENING TO ONLINE AUDIO IN LAST WEEK

ONLINE AUDIO = LISTENING TO AM/AM/FM/DAB+ RADIO STATIONS ONLINE AND/OR LISTENING TO STREAMED AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET; DOES NOT INCLUDE YOUTUBE FOR MUSIC



 THE INFINITE DIAL® 2019

In-Car Media



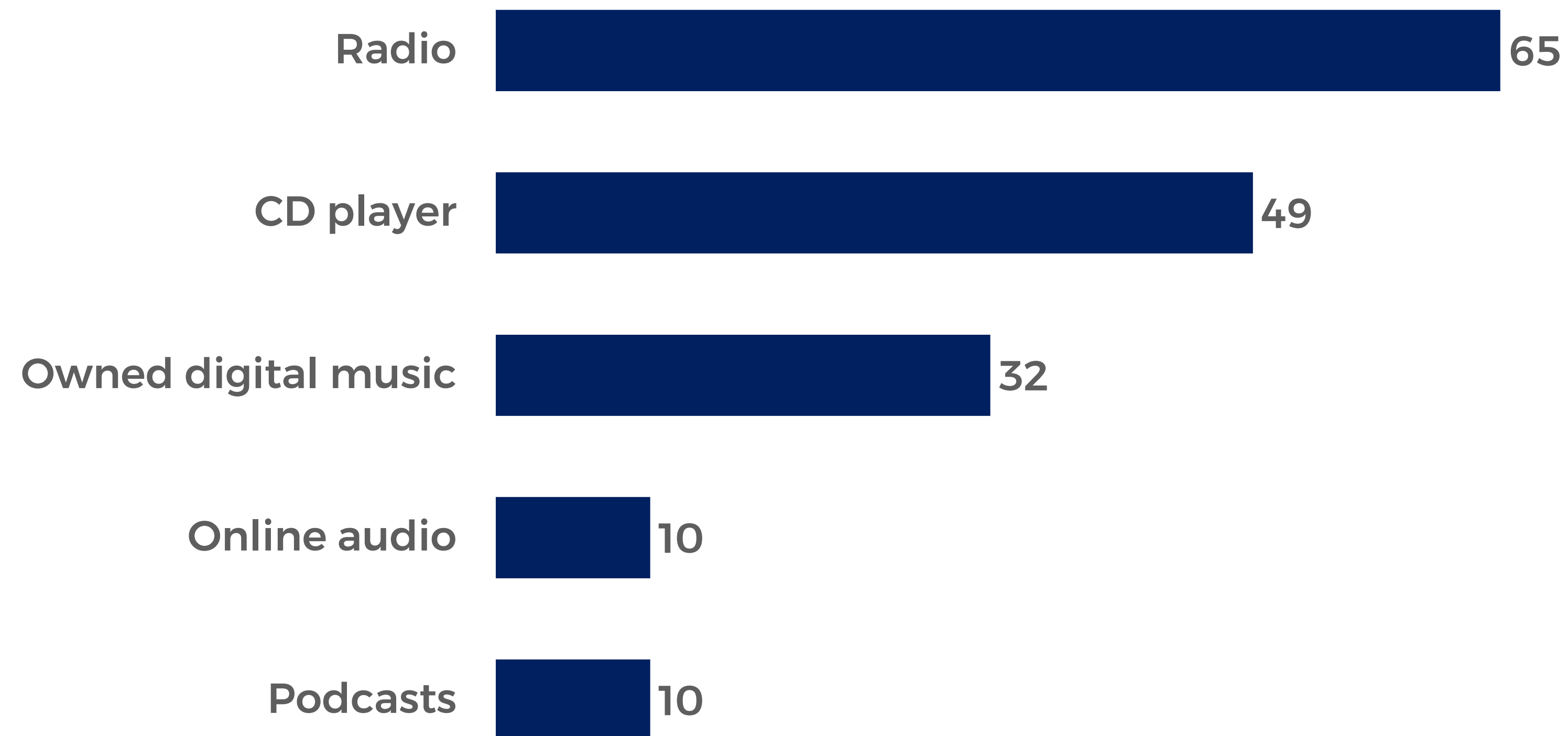
#InfiniteDial

THE INFINITE DIAL © 2019 EDISON RESEARCH

Audio Sources Used in Car in South Africa

BASE: SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 18+ WHO HAVE DRIVEN/RIDDEN IN CAR IN LAST MONTH

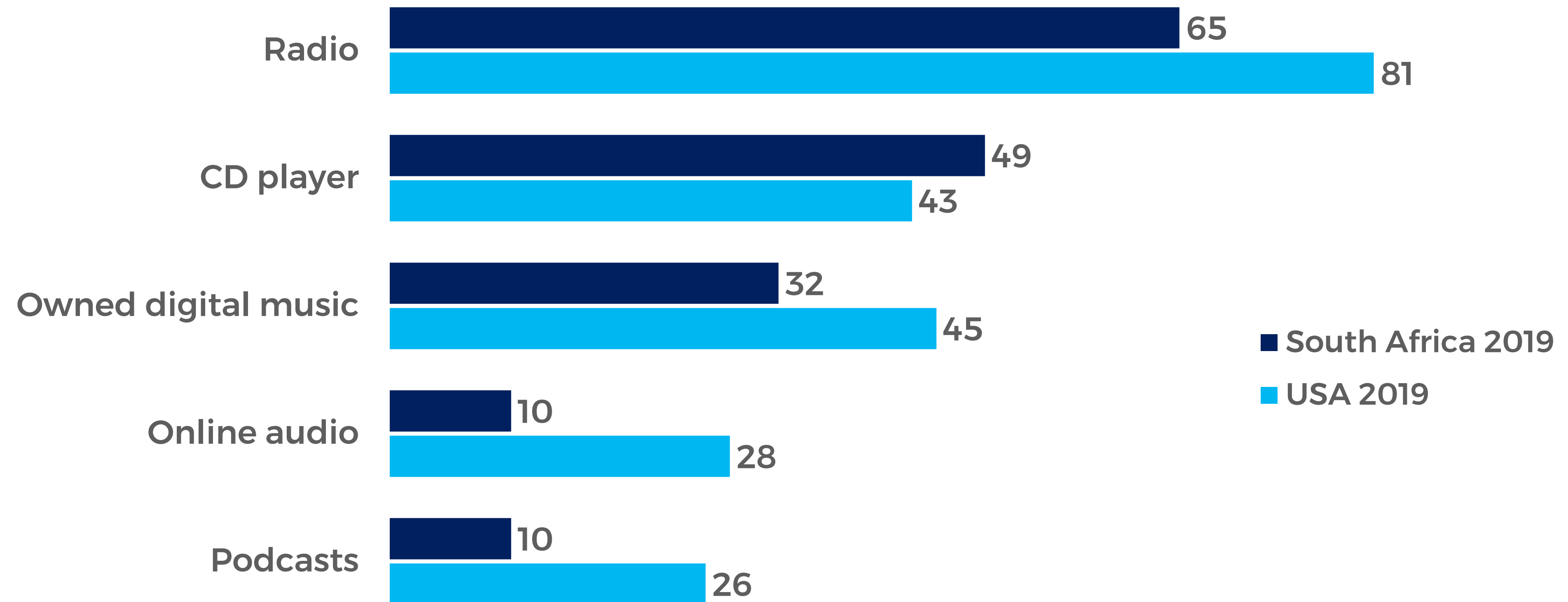
% USING AUDIO SOURCE IN CAR



Audio Sources Used in Car

USA POPULATION 18+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 18+ WHO HAVE DRIVEN/RIDDEN IN A CAR IN LAST MONTH

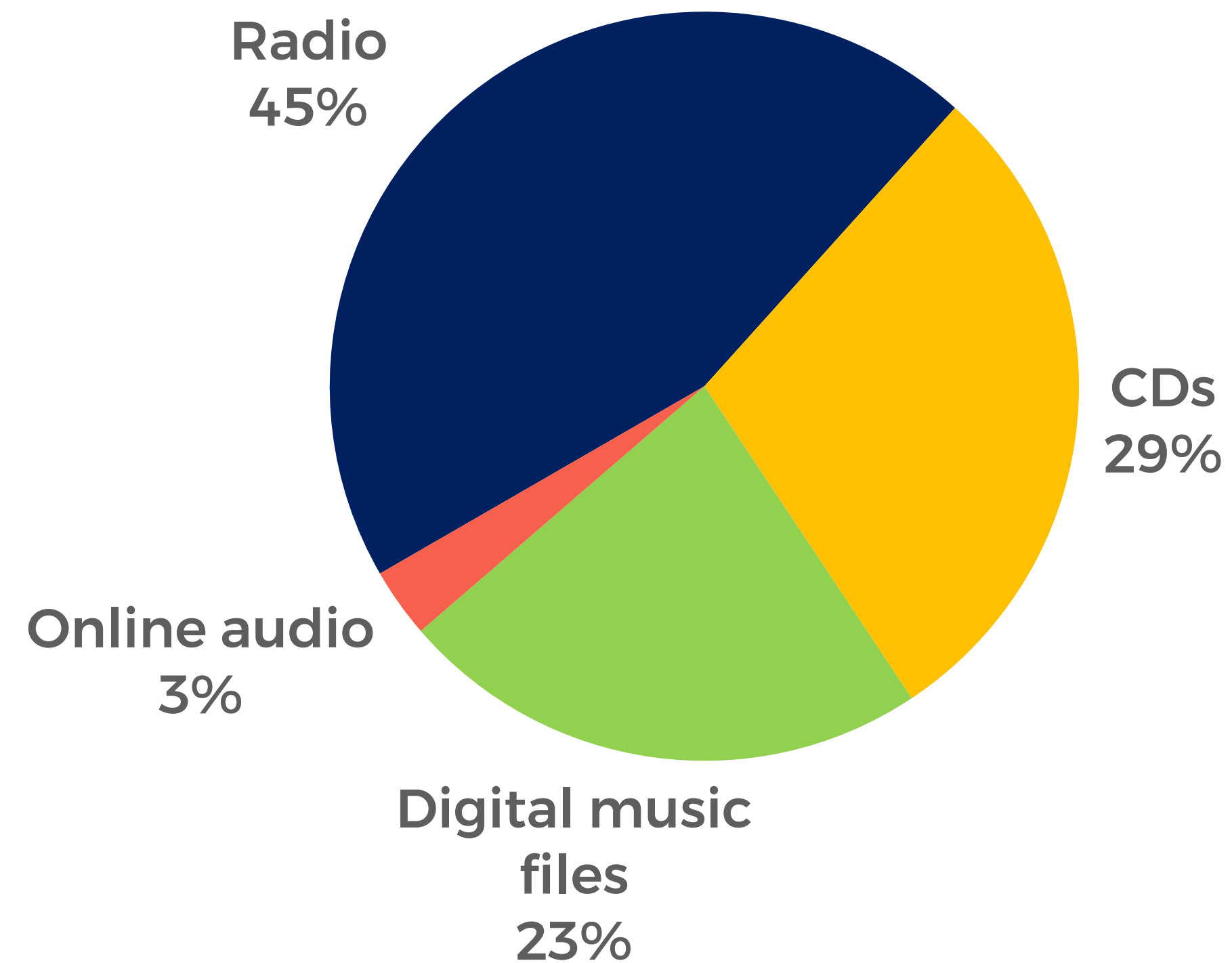
% USING AUDIO SOURCE IN CAR



Audio Source Used Most Often in Car in South Africa

SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 18+; DRIVEN/RIDDEN IN A CAR IN LAST MONTH; USE ANY AUDIO SOURCE IN CAR

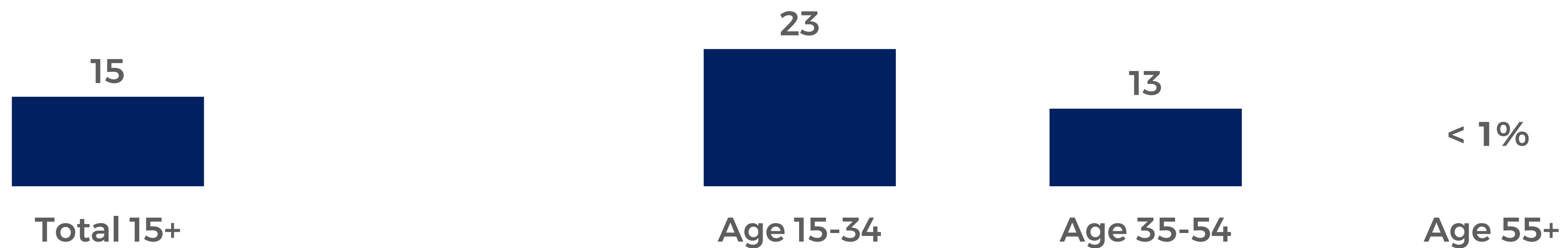
% USING AUDIO SOURCE MOST OFTEN IN CAR



Online Audio Listening in Car Through Mobile Phone in South Africa

BASE: SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+ WHO OWN A MOBILE PHONE

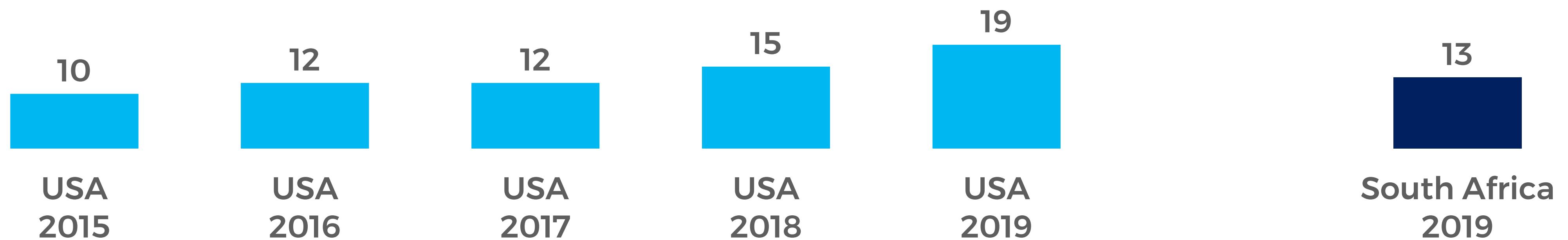
% EVER LISTENED TO ONLINE AUDIO IN A CAR THROUGH A MOBILE PHONE



In-Dash Information and Entertainment Systems

USA POPULATION 18+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 18+ WHO HAVE DRIVEN/RIDDEN IN A CAR IN LAST MONTH

% OWNING IN-DASH INFORMATION AND ENTERTAINMENT SYSTEM IN CAR



 THE INFINITE DIAL® 2019

Podcasting



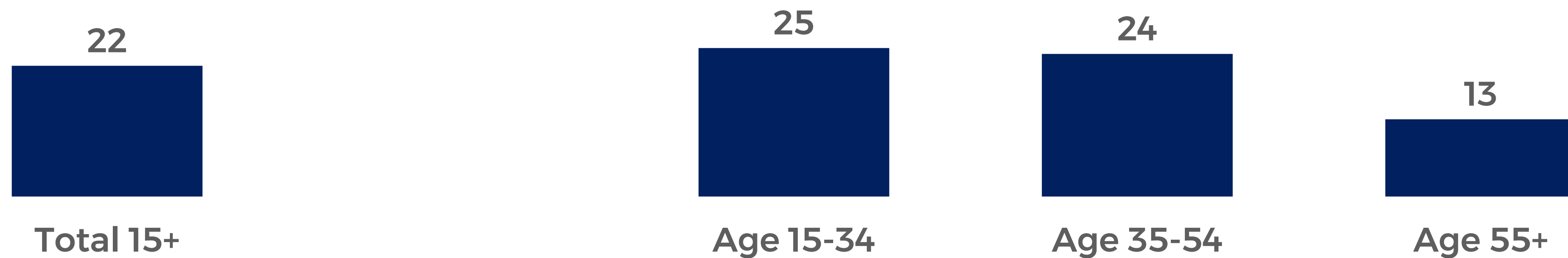
#InfiniteDial

THE INFINITE DIAL © 2019 EDISON RESEARCH

Podcasting Awareness in South Africa

TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)

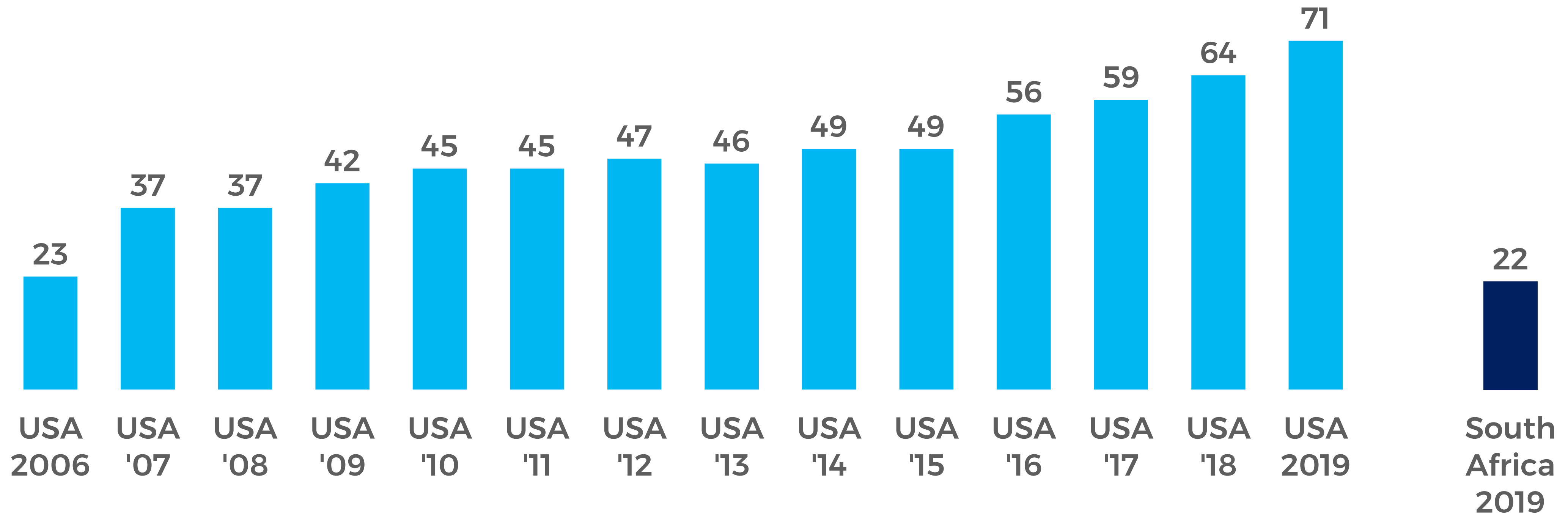
% AWARE OF PODCASTING



Podcasting Awareness

USA TOTAL POPULATION 15+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+

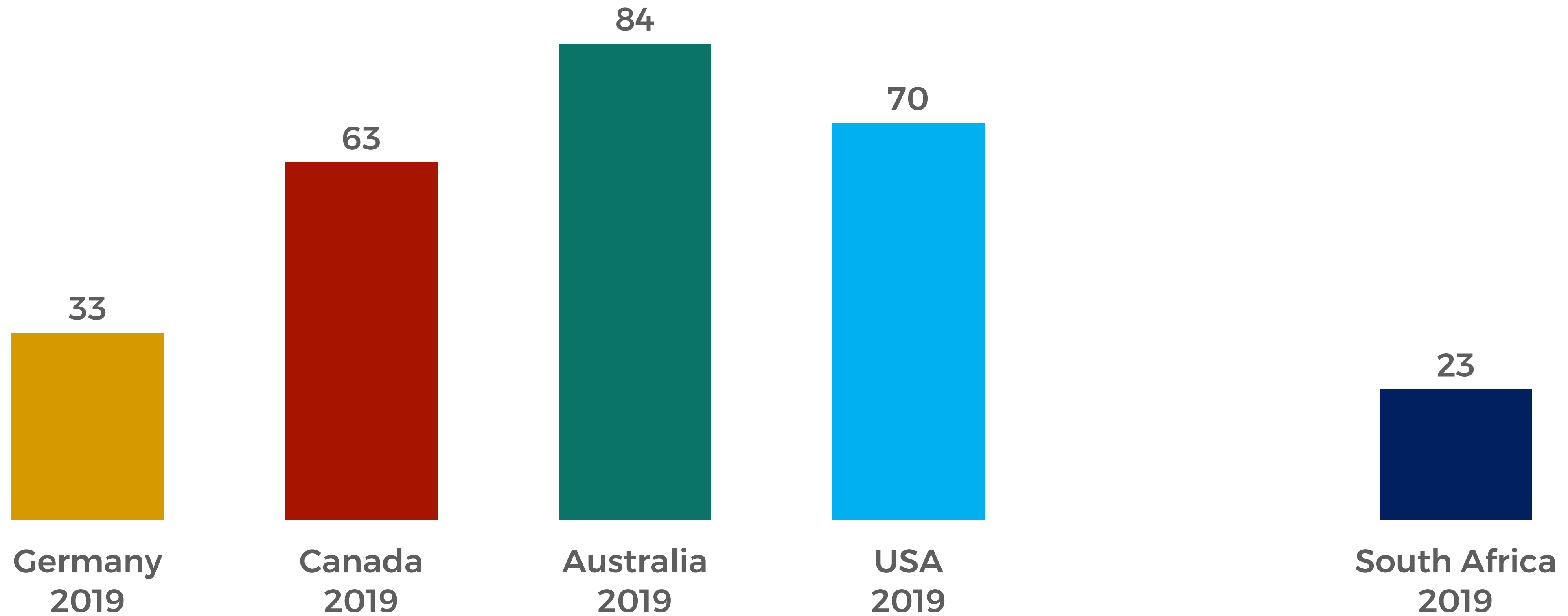
% AWARE OF PODCASTING



Podcasting Awareness

GERMAN, CANADIAN, AUSTRALIAN, AND USA TOTAL POPULATIONS 18+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 18+

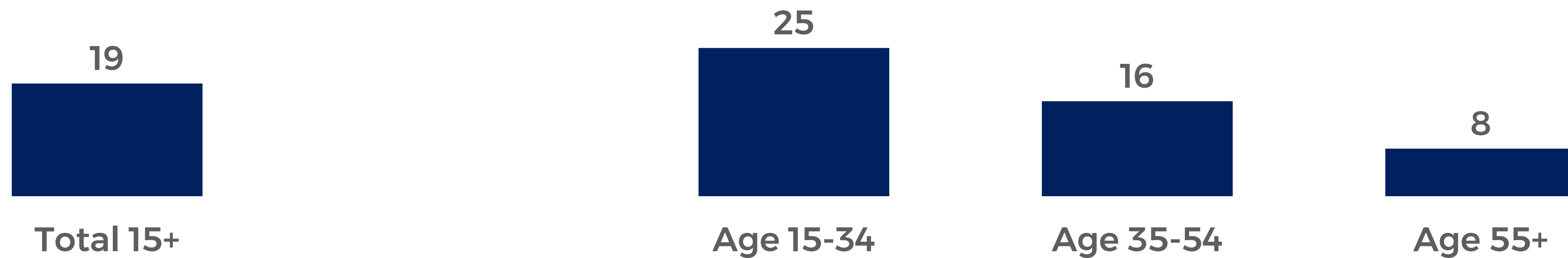
% AWARE OF PODCASTING



Podcast Listening in South Africa

TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)

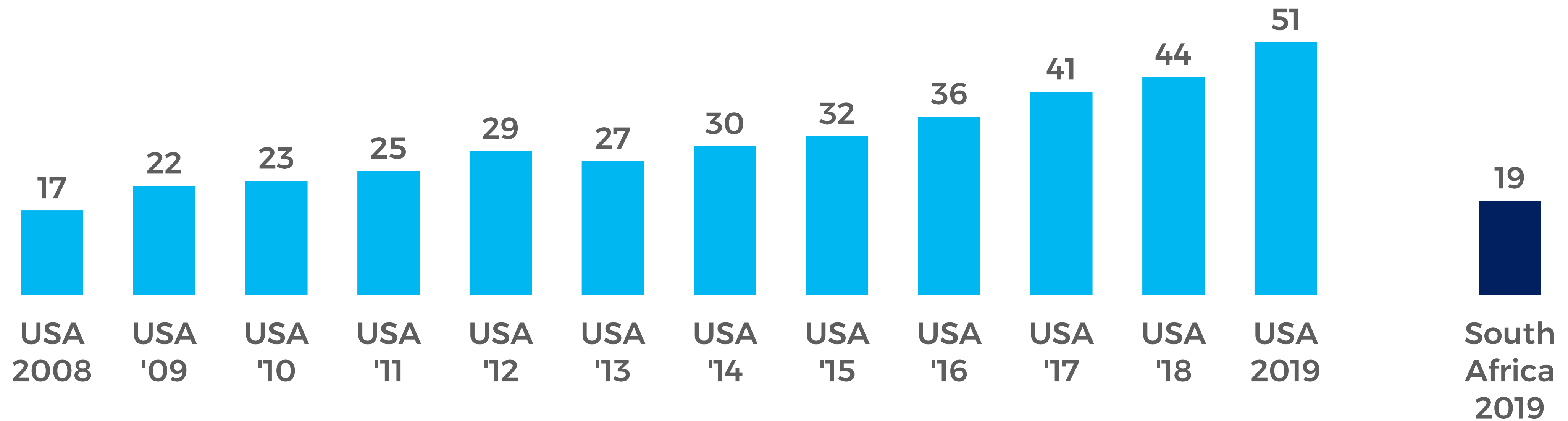
% EVER LISTENED TO A PODCAST



Podcast Listening

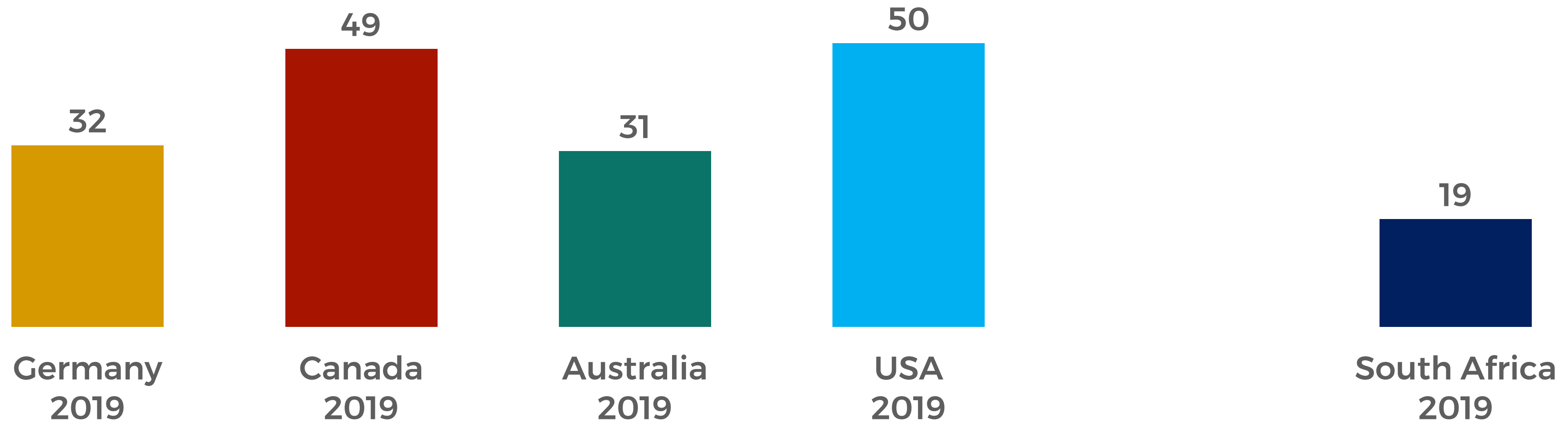
USA TOTAL POPULATION 15+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+

% EVER LISTENED TO A PODCAST



Podcasting Listening

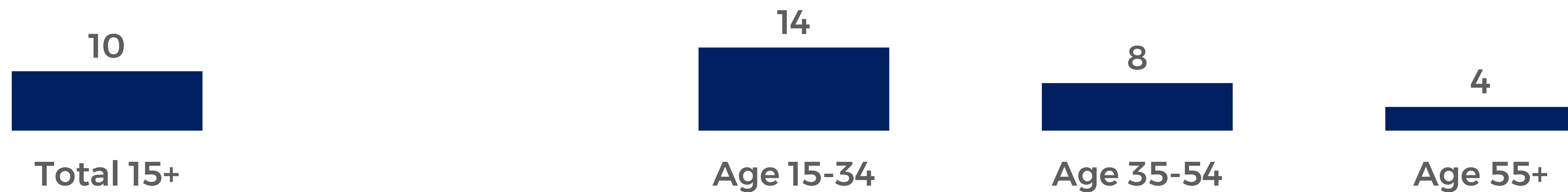
GERMAN, CANADIAN, AUSTRALIAN, AND USA TOTAL POPULATIONS 18+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 18+
% EVER LISTENED TO A PODCAST



Monthly Podcast Listening in South Africa

TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)

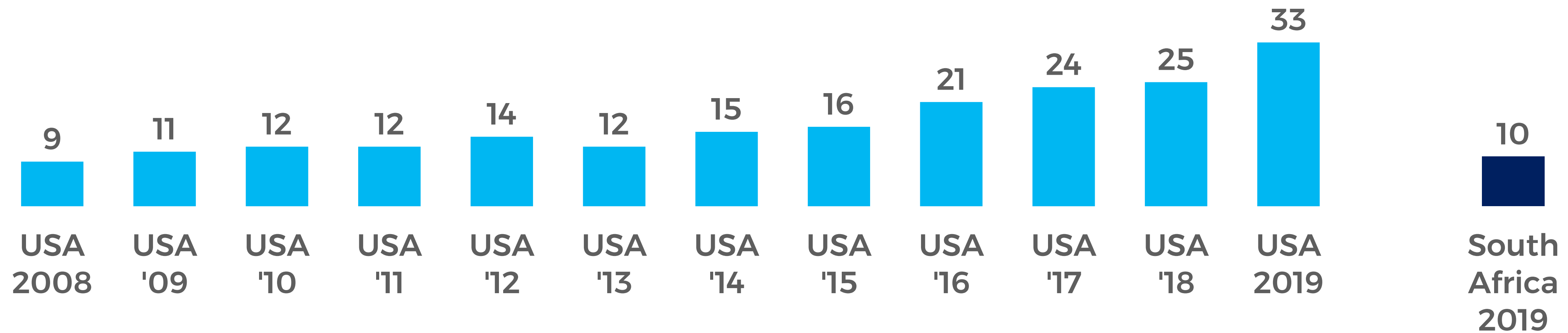
% LISTENED TO A PODCAST IN LAST MONTH



Monthly Podcast Listening

USA TOTAL POPULATION 15+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+

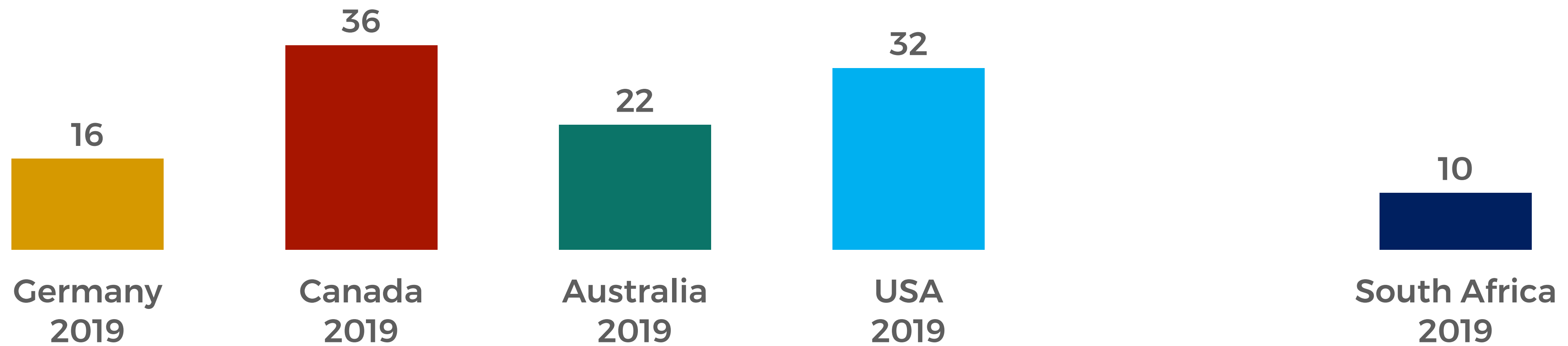
% LISTENED TO A PODCAST IN LAST MONTH



Monthly Podcast Listening

GERMAN, CANADIAN, AUSTRALIAN, AND USA TOTAL POPULATIONS 18+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 18+

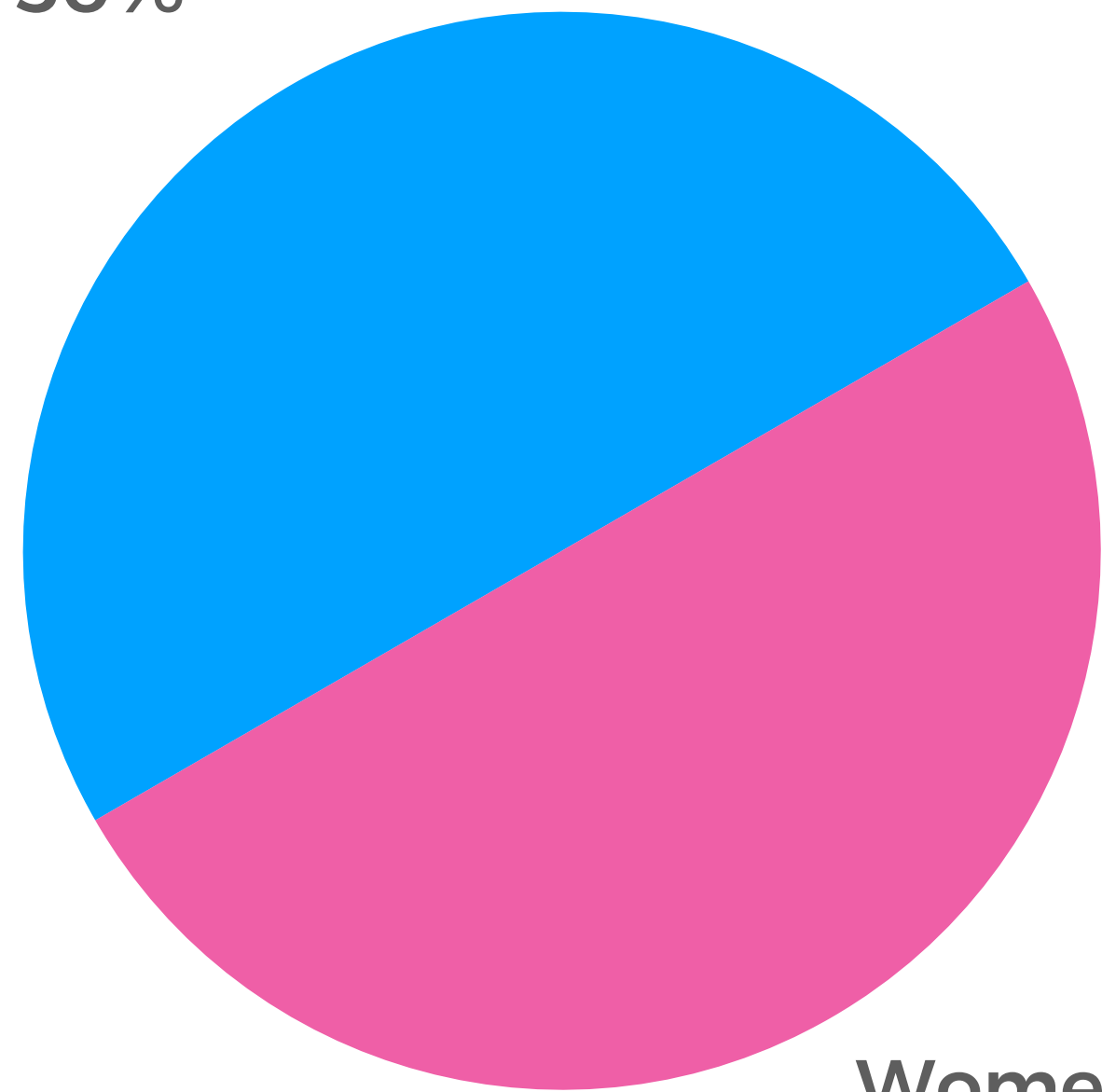
% LISTENED TO A PODCAST IN LAST MONTH



Composition of Monthly Podcast Listeners

SOUTH AFRICAN MAJOR METRO
COMMERCIAL POPULATION 15+

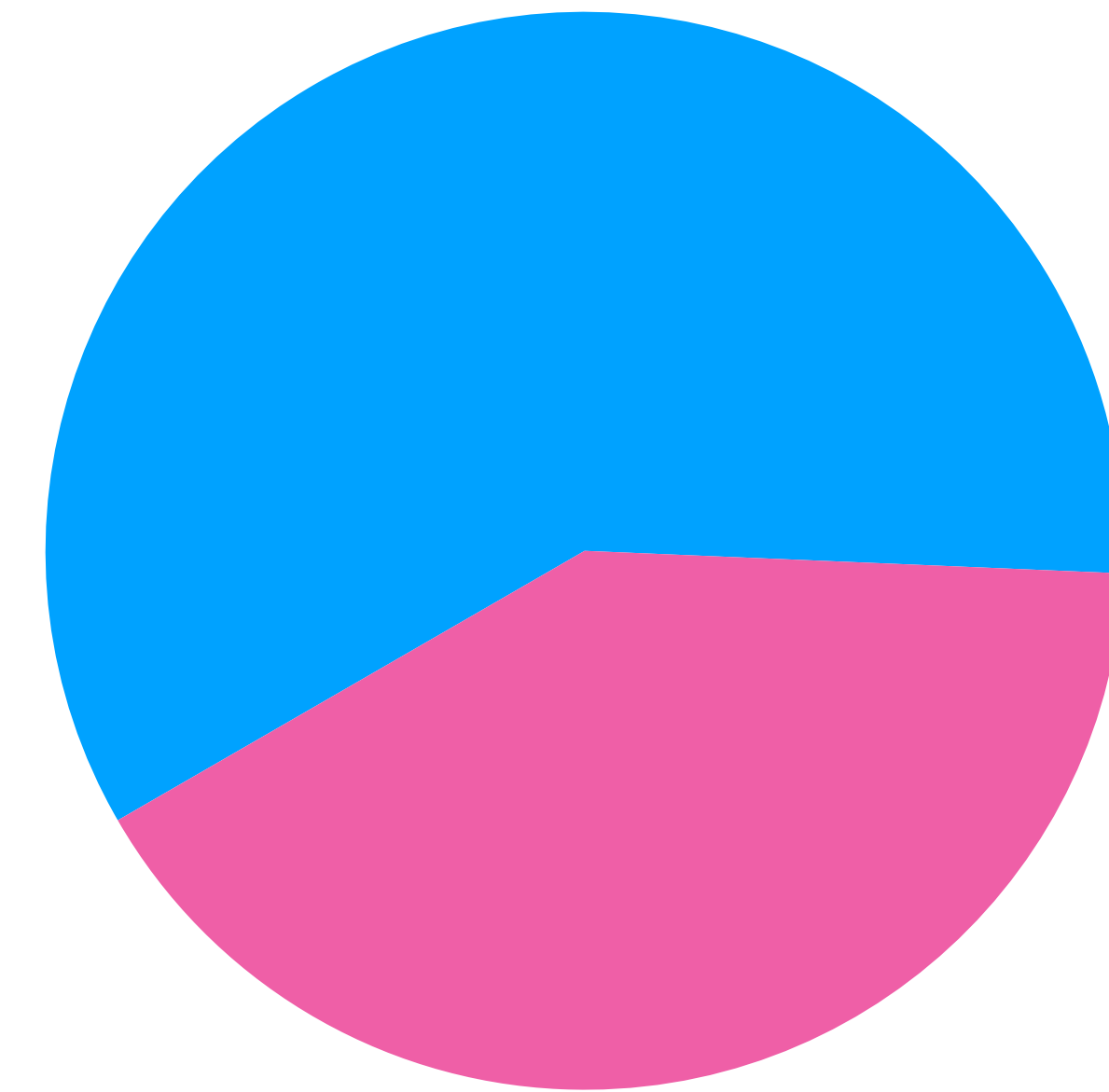
Men
50%



Women
50%

MONTHLY PODCAST CONSUMERS 15+

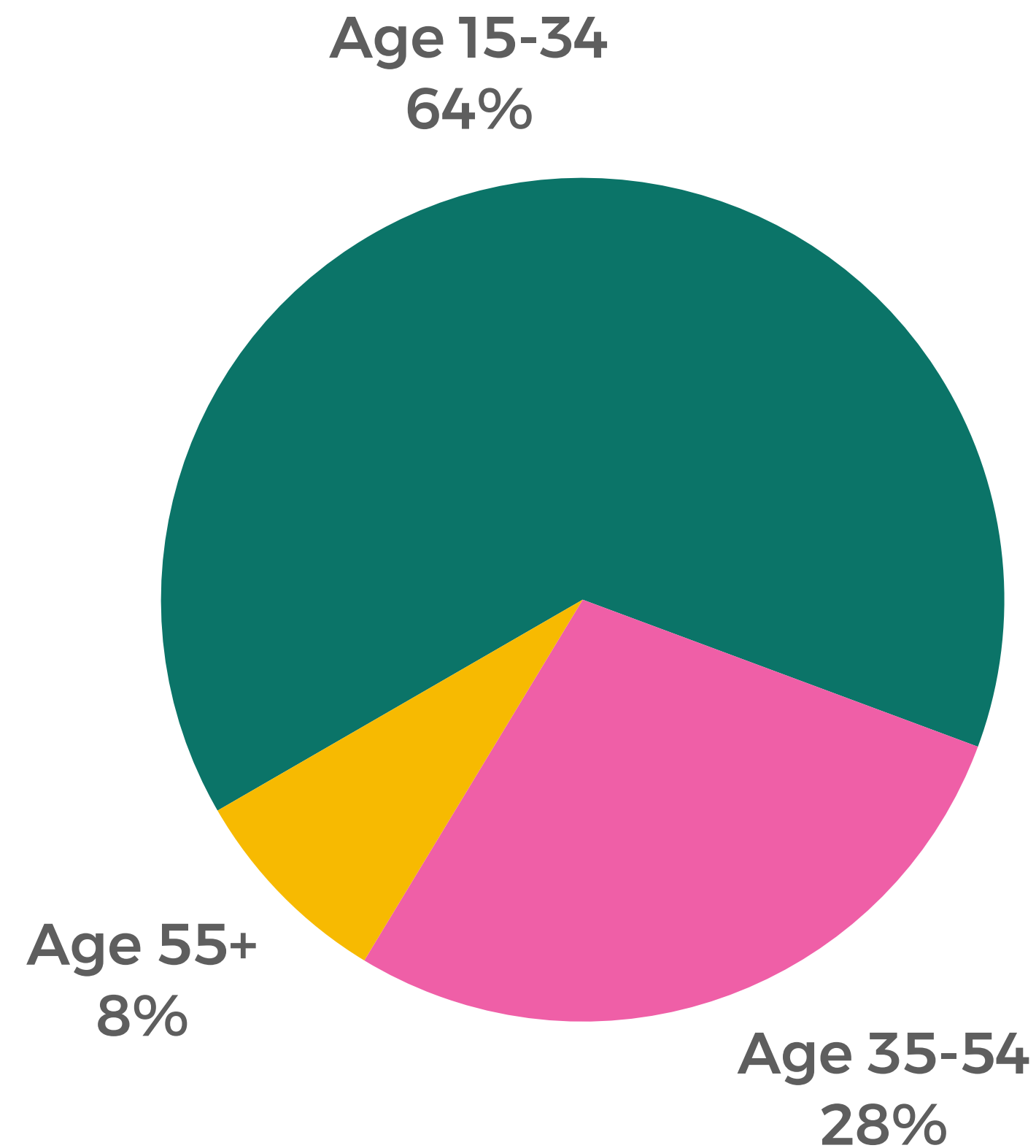
Men
59%



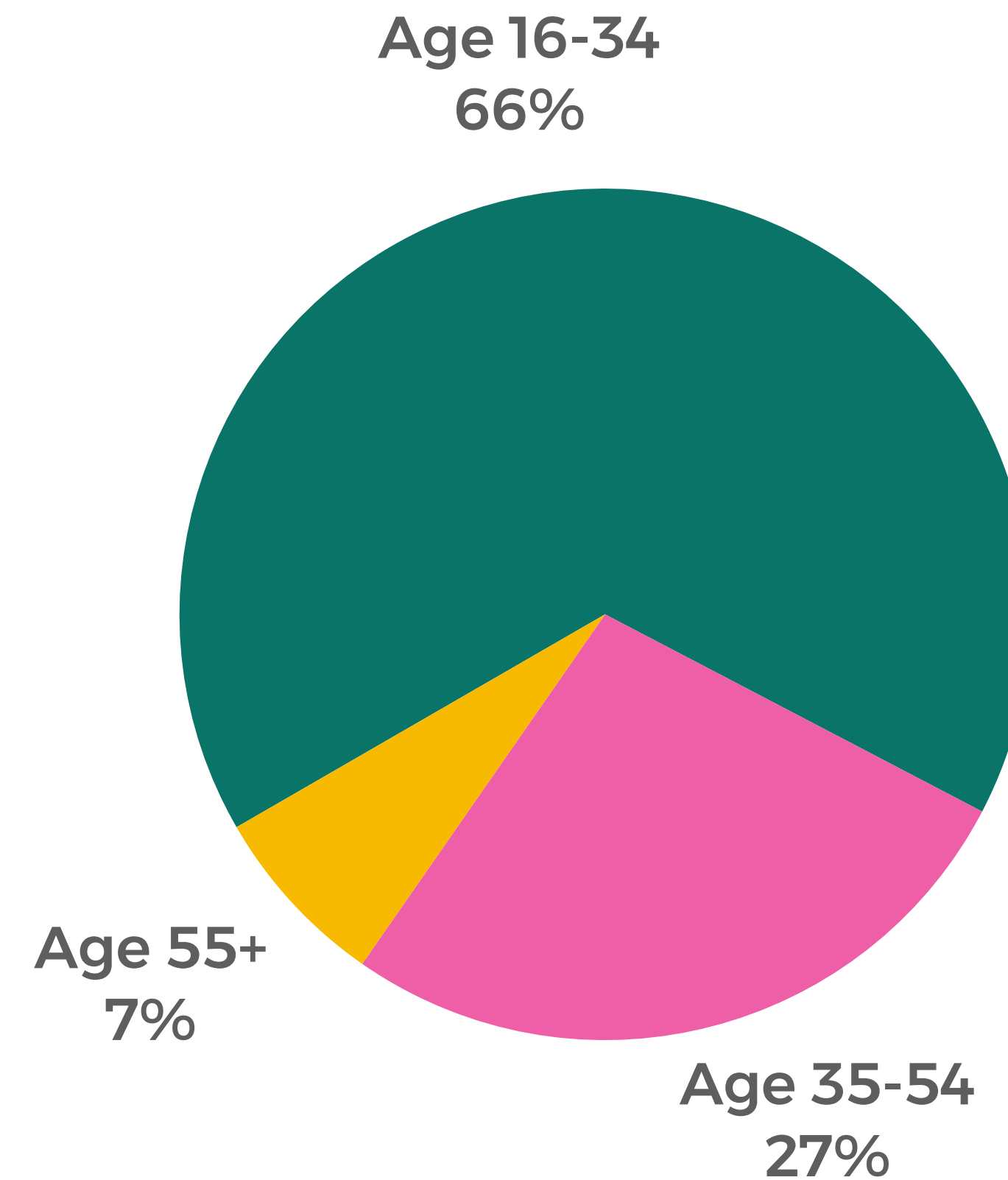
Women
41%

Composition of Monthly Podcast Listeners

SOUTH AFRICAN MAJOR METRO
COMMERCIAL POPULATION 15+



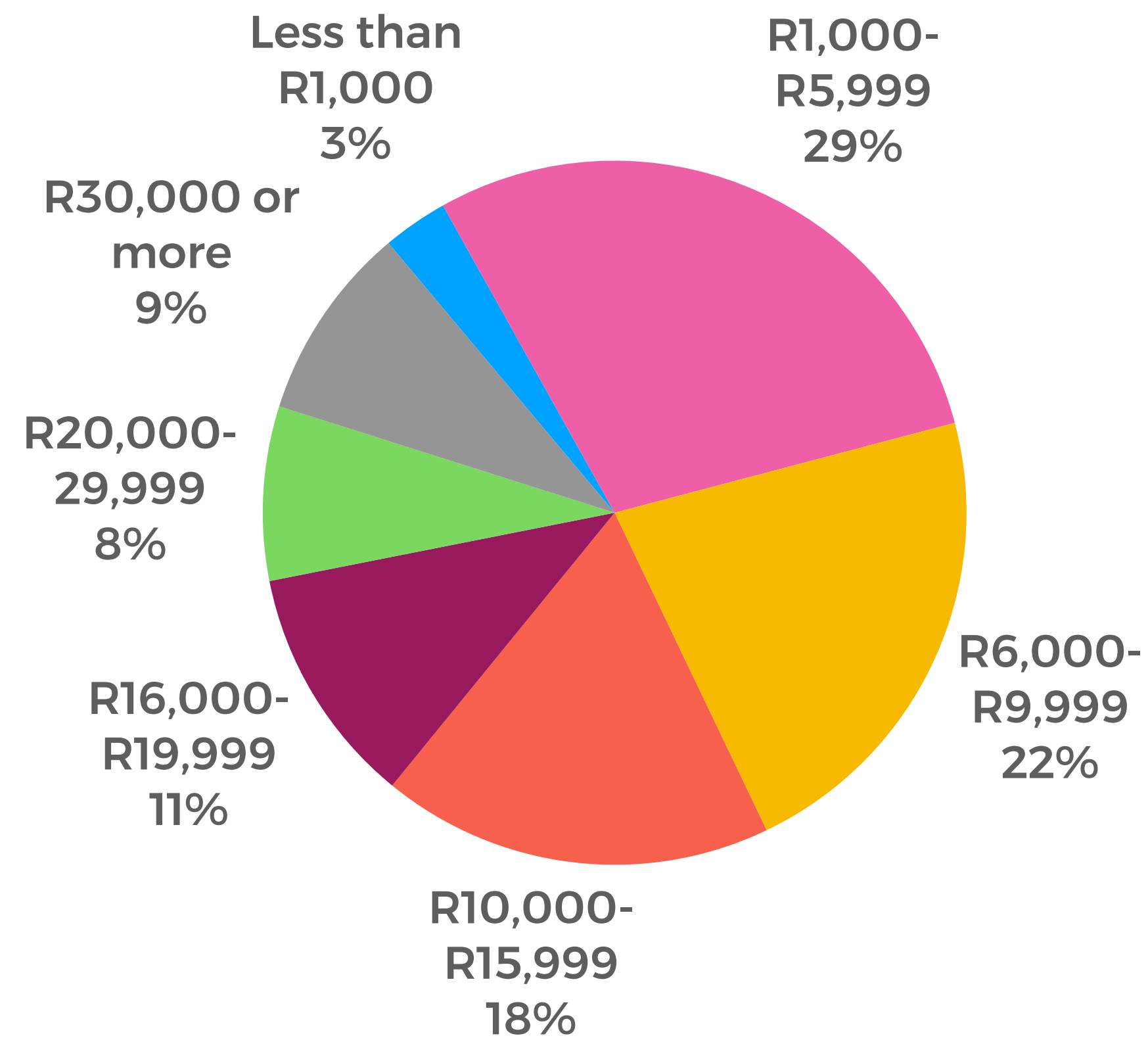
MONTHLY PODCAST CONSUMERS 15+



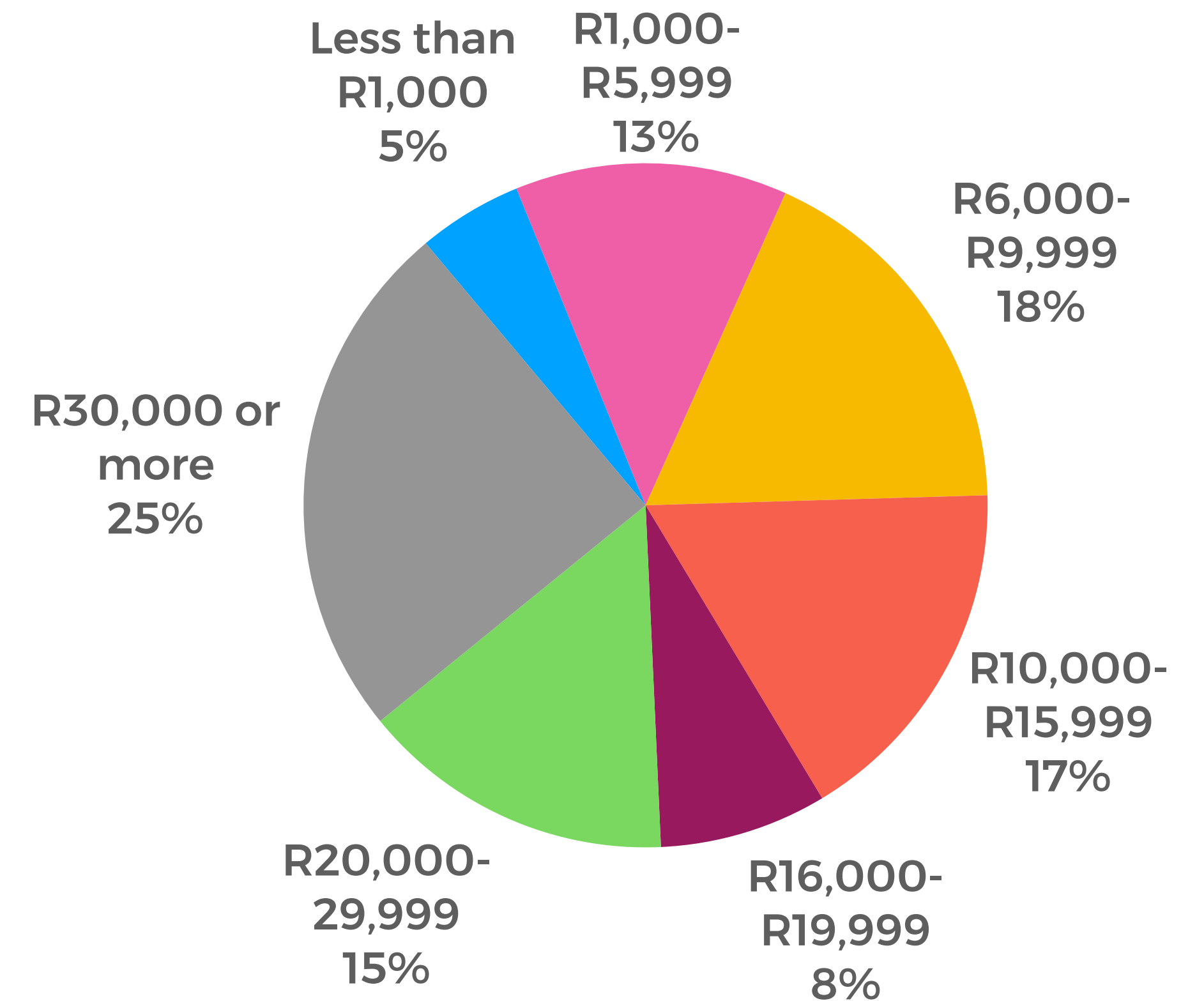
Composition of Monthly Podcast Listeners

TOTAL MONTHLY HOUSEHOLD INCOME

SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+

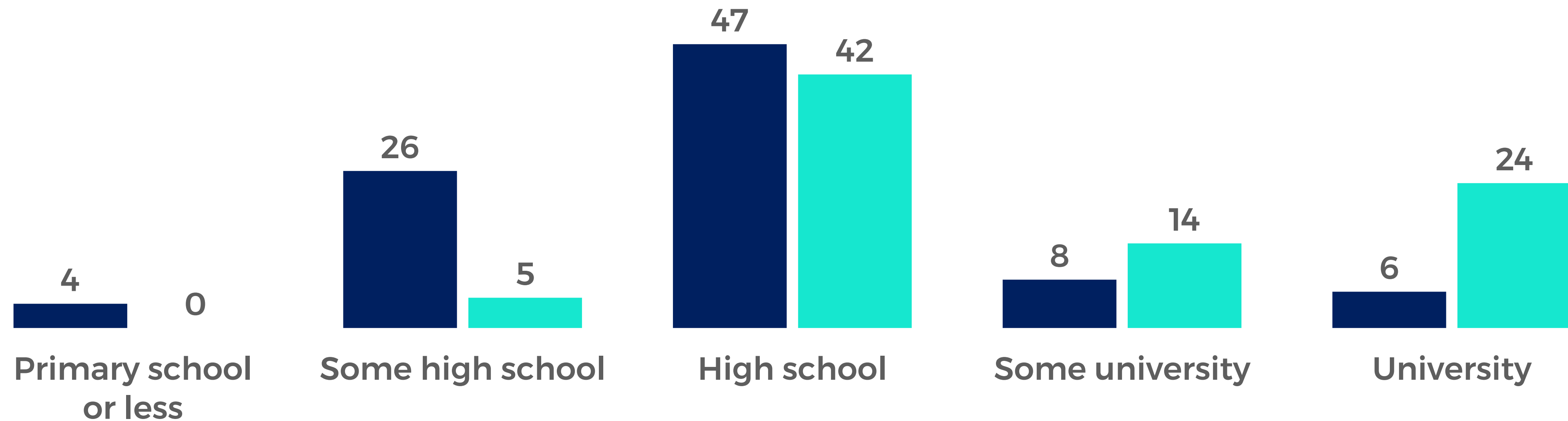


MONTHLY PODCAST CONSUMERS 15+



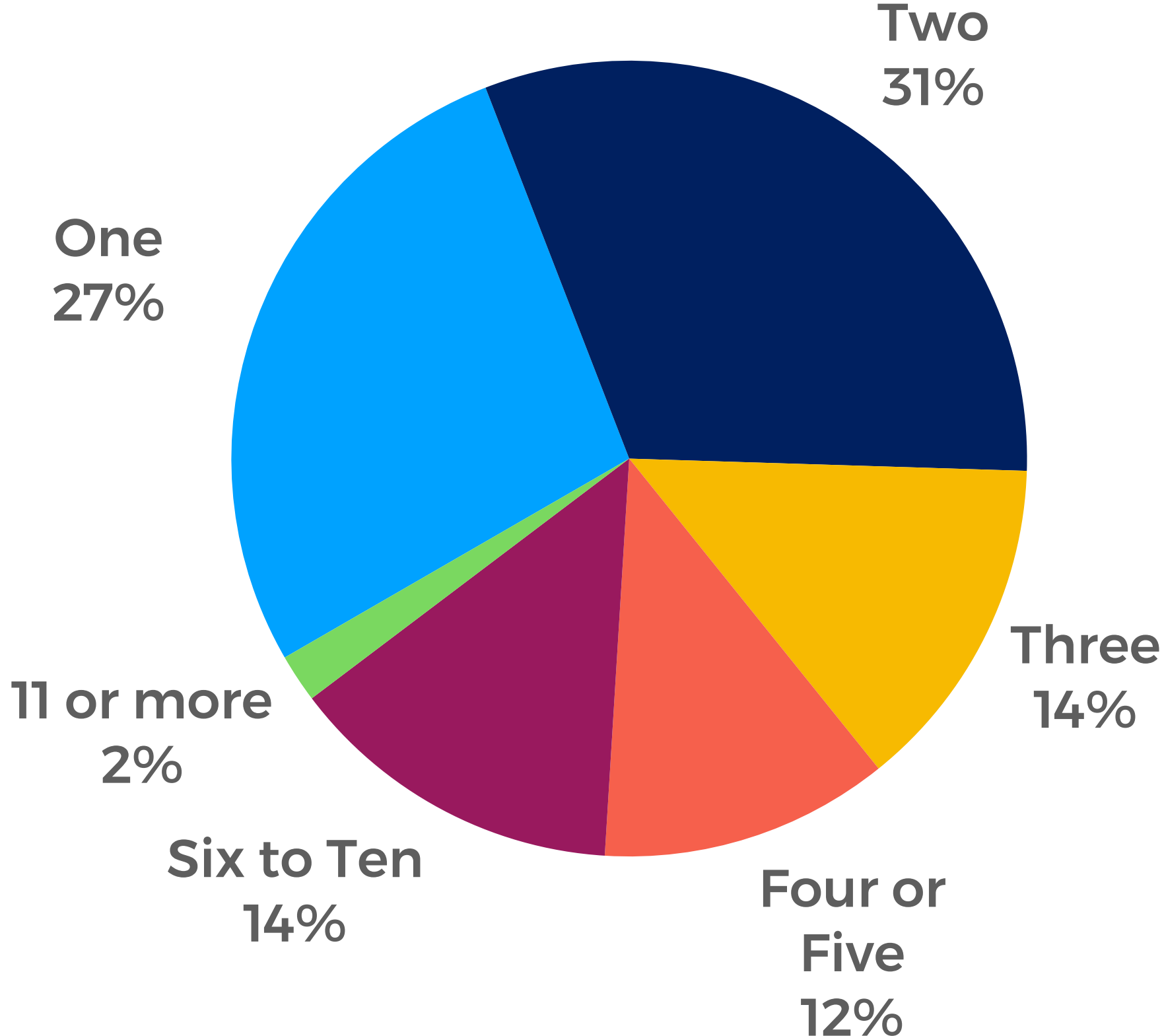
Composition of Monthly Podcast Listeners

■ South African Major Metro Commercial Population 18+ ■ Monthly Podcast Consumers 18+



Number of Podcasts Listened to in Last Week in South Africa

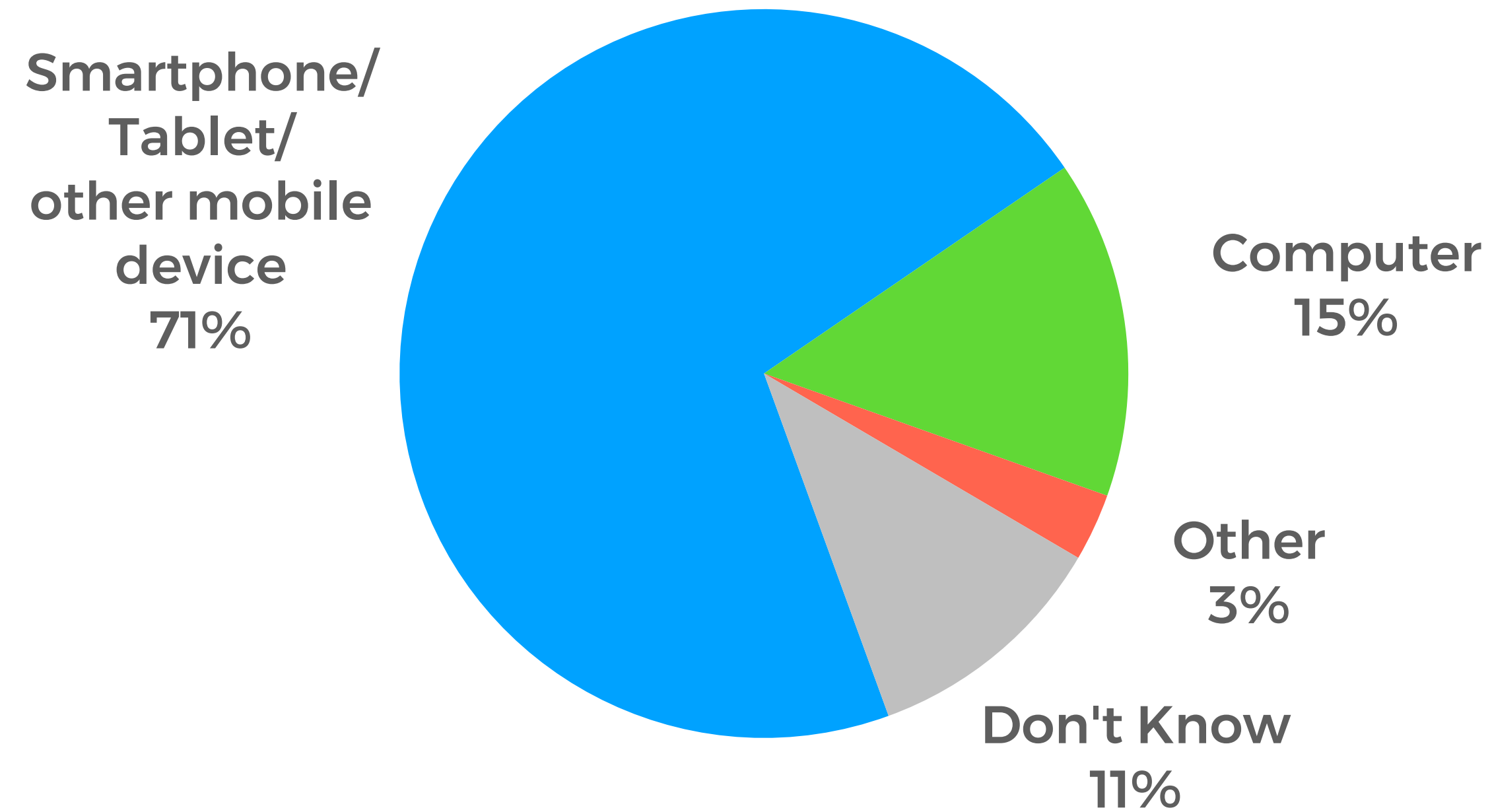
BASE: SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+ WHO LISTENED TO PODCAST IN LAST WEEK; 6%



South African weekly podcast listeners averaged **four podcasts** in the last week

Device Used Most Often to Listen to Podcasts in South Africa

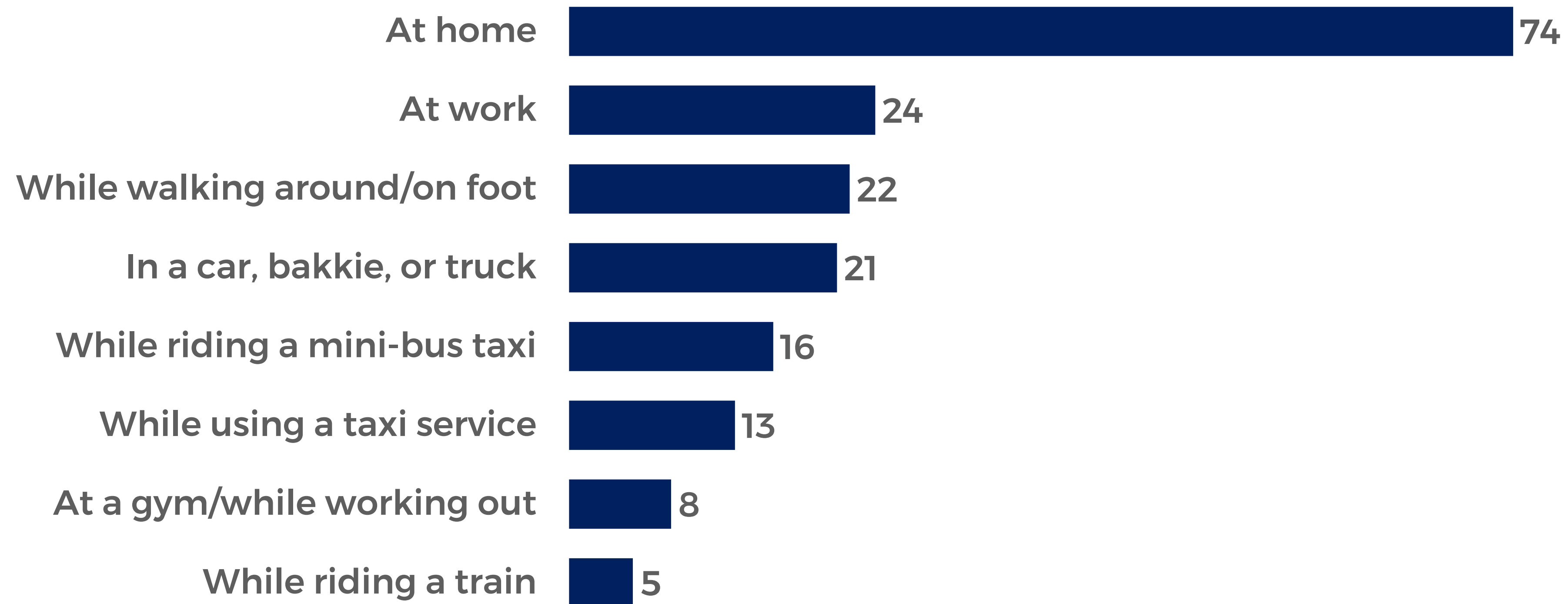
BASE: SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+ WHO EVER LISTENED TO A PODCAST



Podcast Listening Locations in South Africa

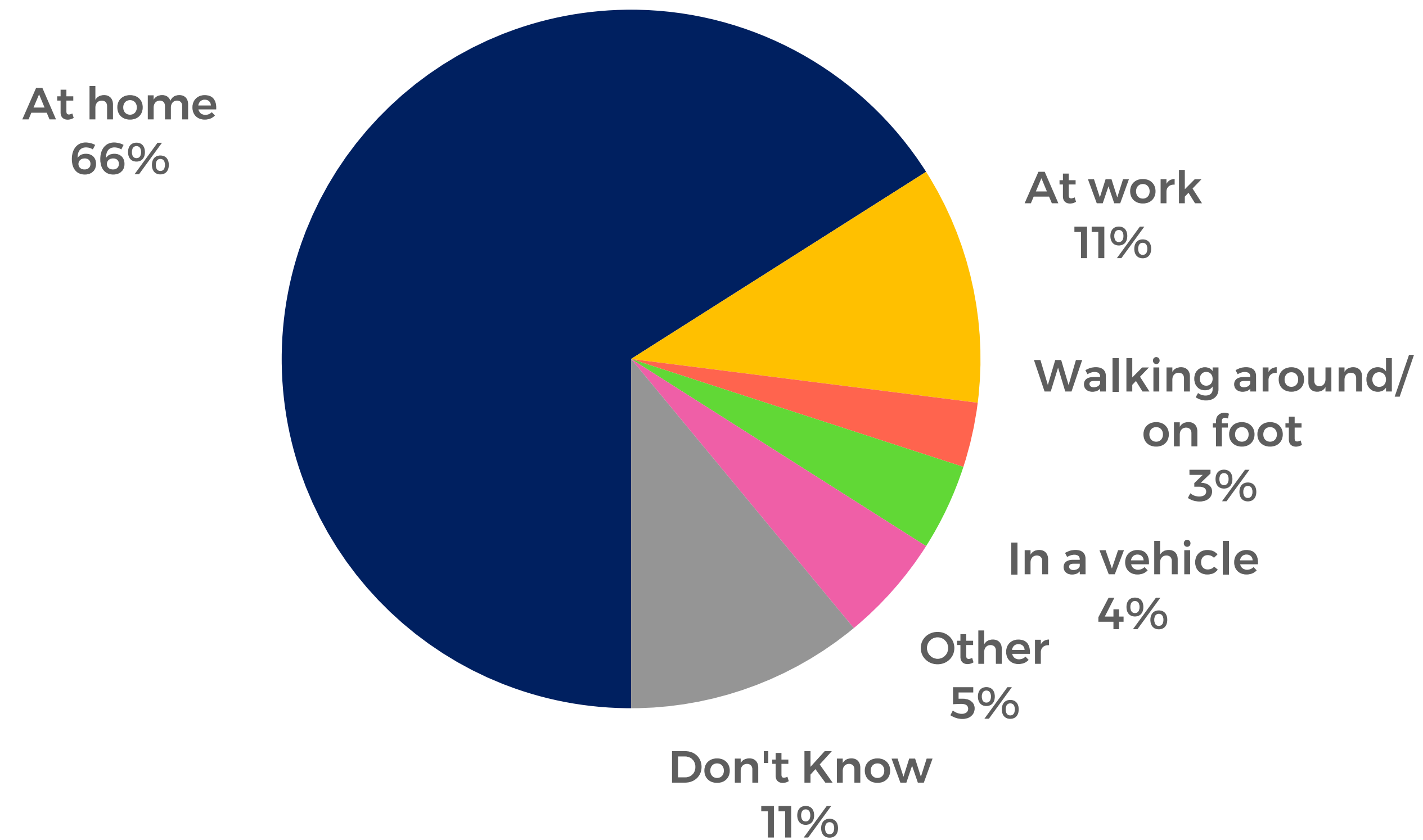
BASE: SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+ WHO EVER LISTENED TO A PODCAST

% HAVE EVER LISTENED TO A PODCAST IN LOCATION



Location Where Podcasts are Most Often Listened to in South Africa

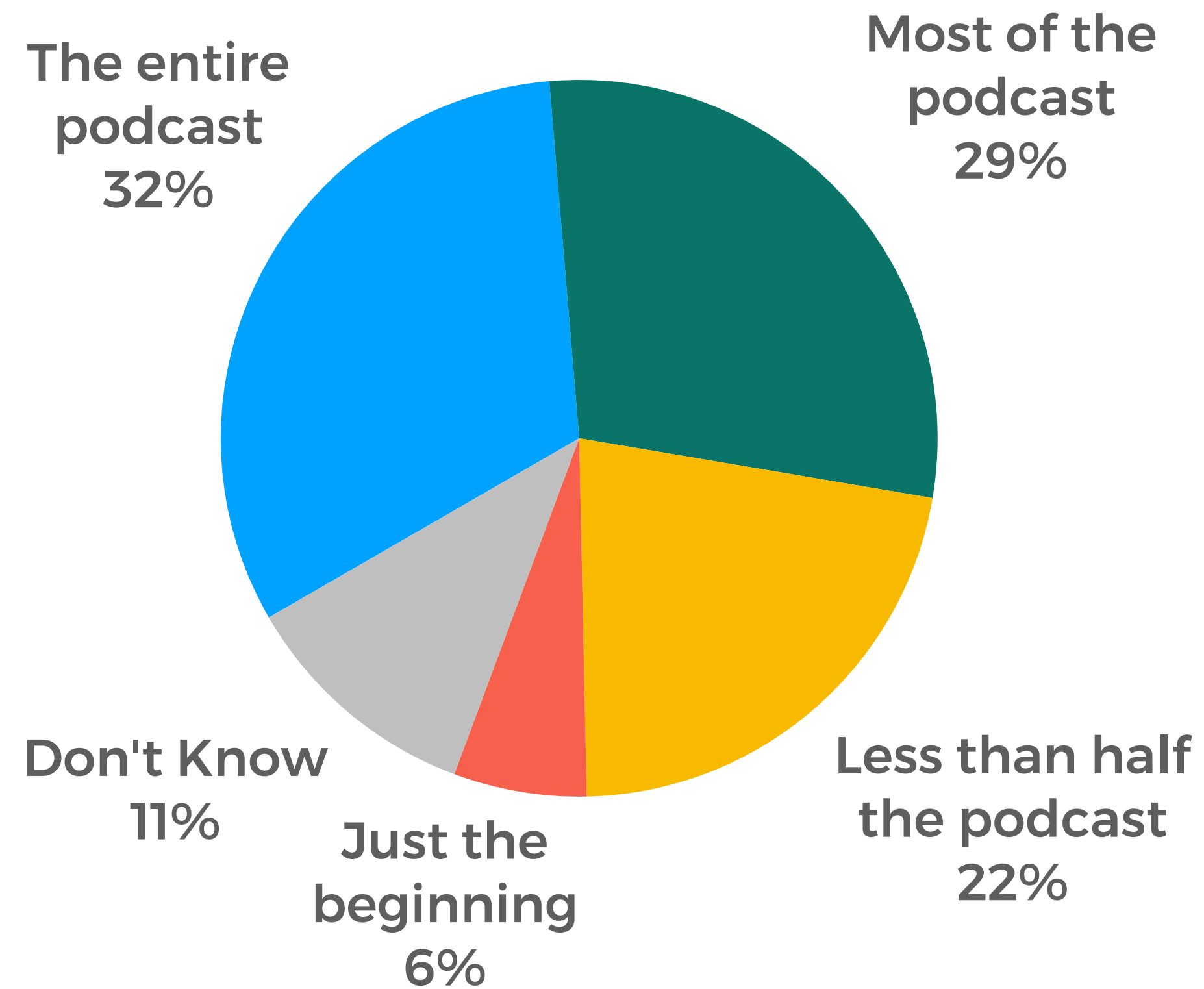
BASE: SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+ WHO EVER LISTENED TO A PODCAST



Amount of Podcast Episode Typically Listened to in South Africa

BASE: SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+ WHO EVER LISTENED TO A PODCAST

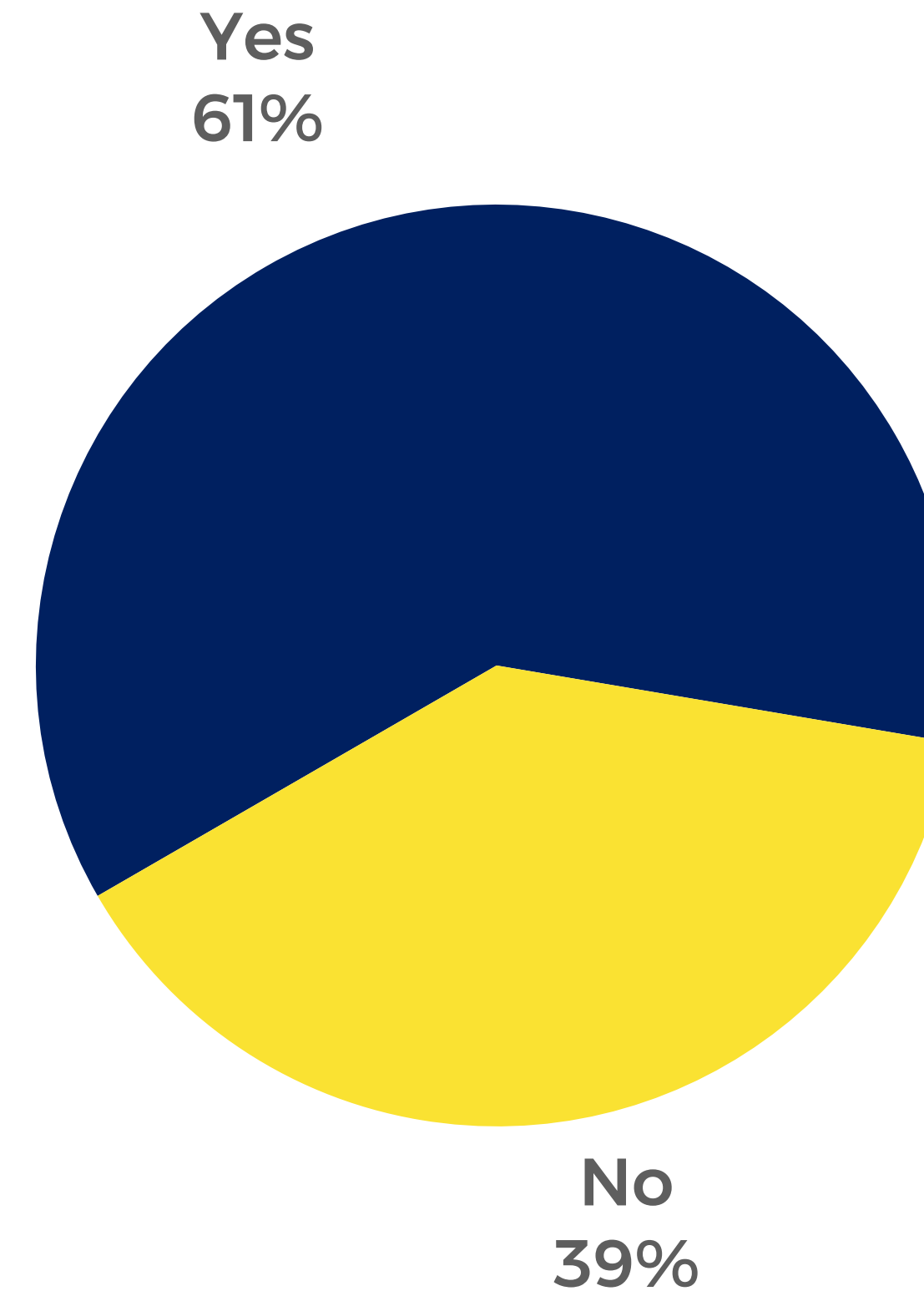
“Think about the audio podcast episodes you listen to. Do you typically listen to...?”



South African Radio Podcast Listening

BASE: SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+ WHO EVER LISTENED TO A PODCAST

“Do you listen to any podcasts by South African radio stations or South African radio personalities?”



 THE INFINITE DIAL® 2019

Social Media



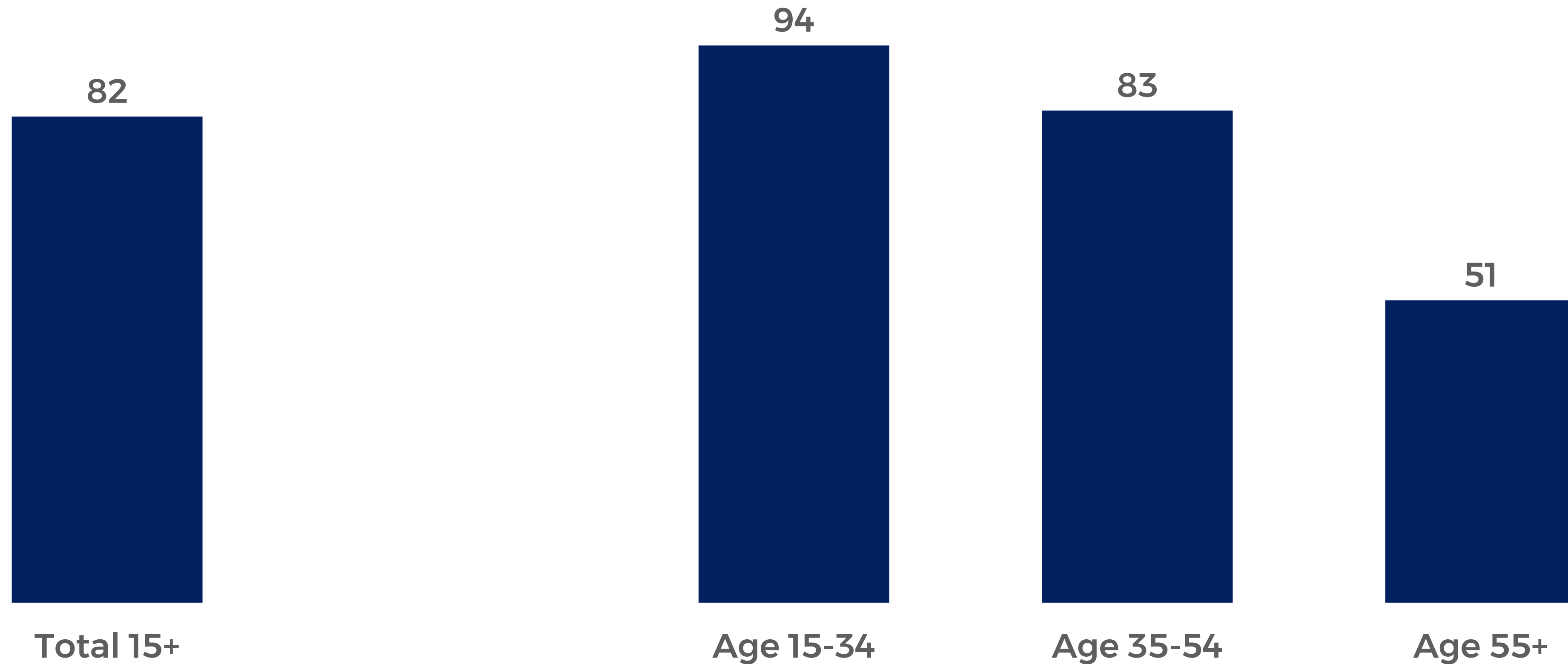
#InfiniteDial

THE INFINITE DIAL © 2019 EDISON RESEARCH

Social Media Usage in South Africa

TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)

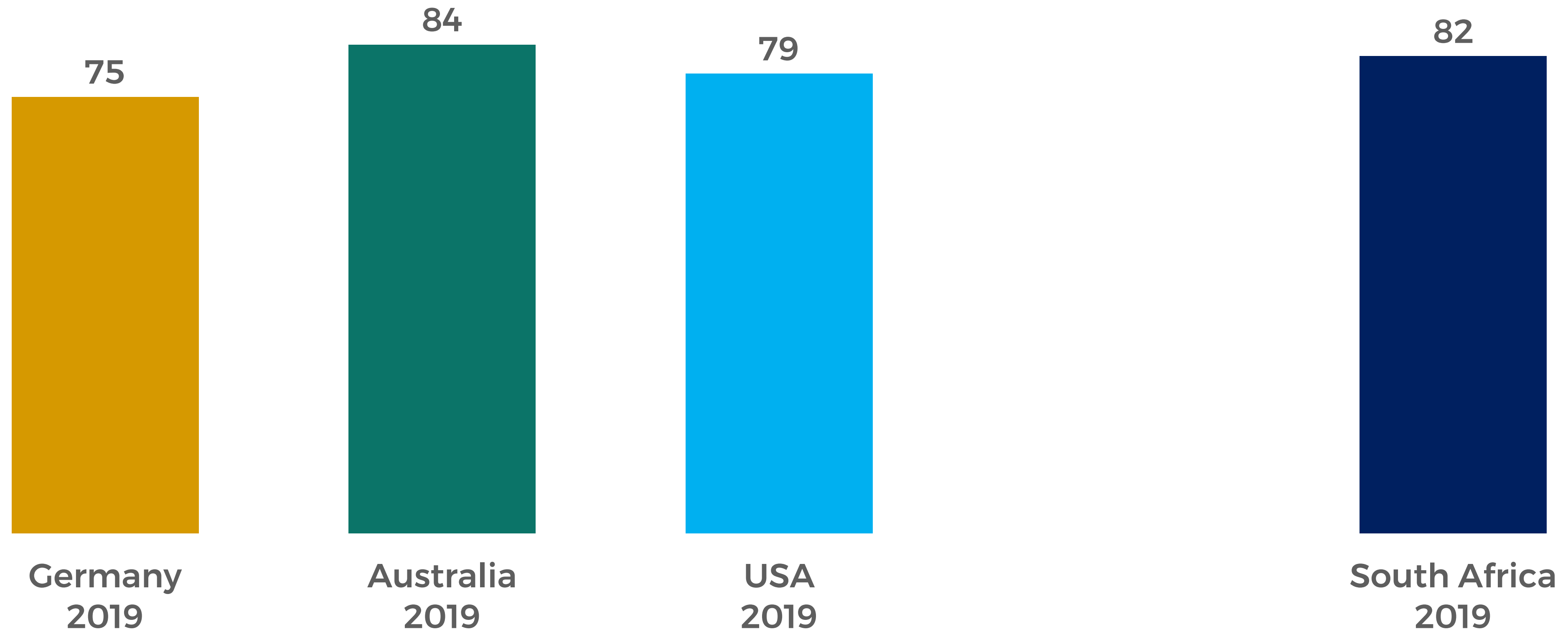
% USING SOCIAL MEDIA



Social Media Usage

GERMAN,, AUSTRALIAN, AND USA TOTAL POPULATIONS 18+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 18+

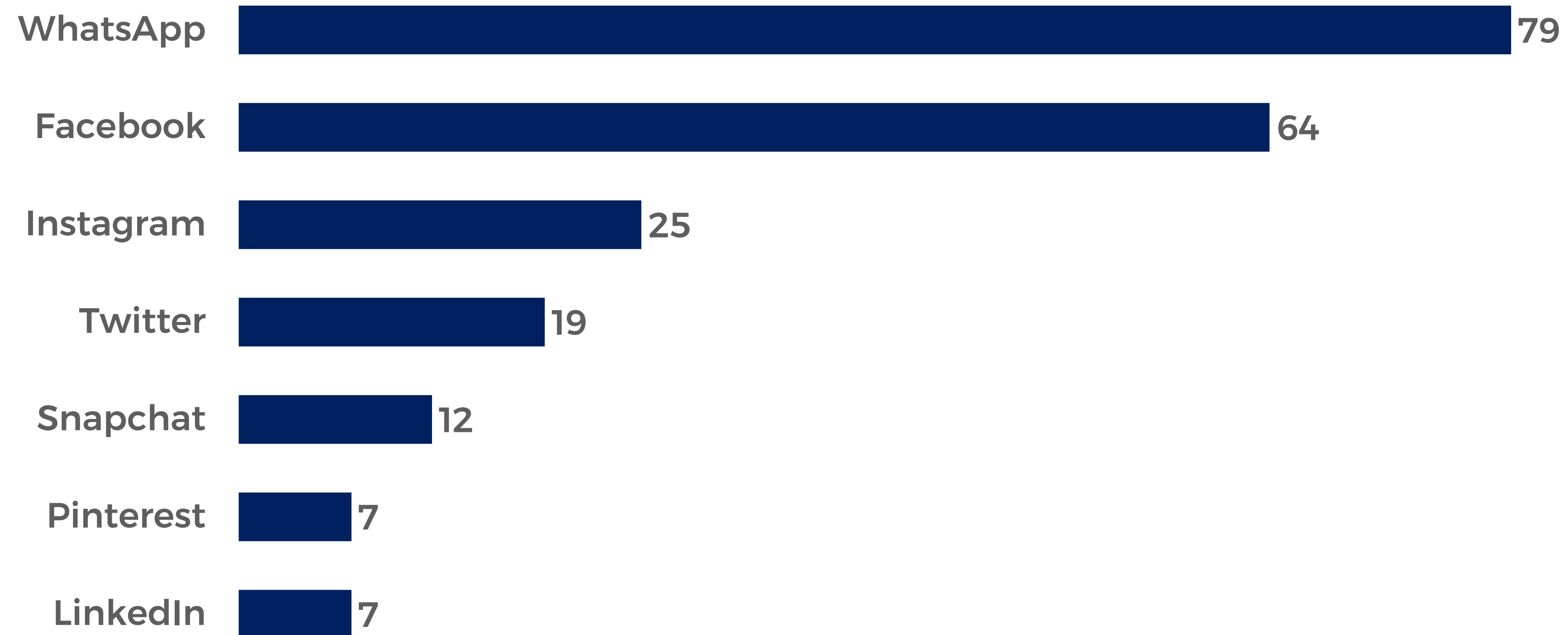
% USING SOCIAL MEDIA



Social Media Brand Usage in South Africa

TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)

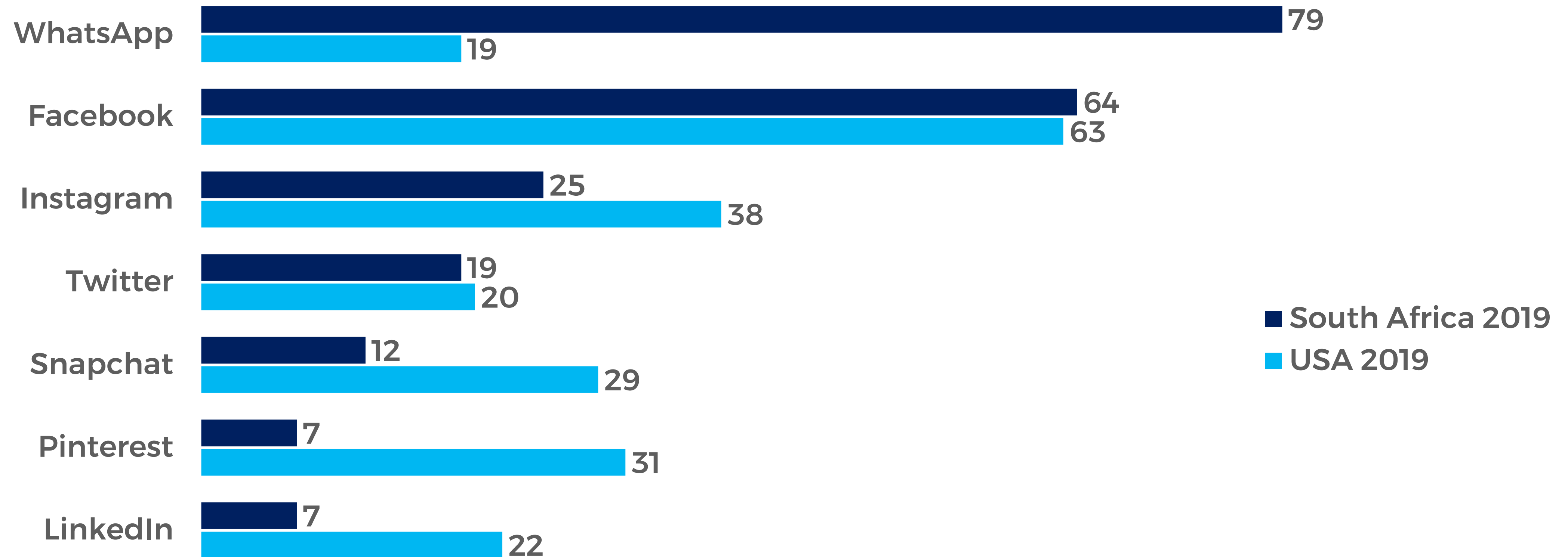
% CURRENTLY USE SOCIAL MEDIA BRAND



Social Media Brand Usage

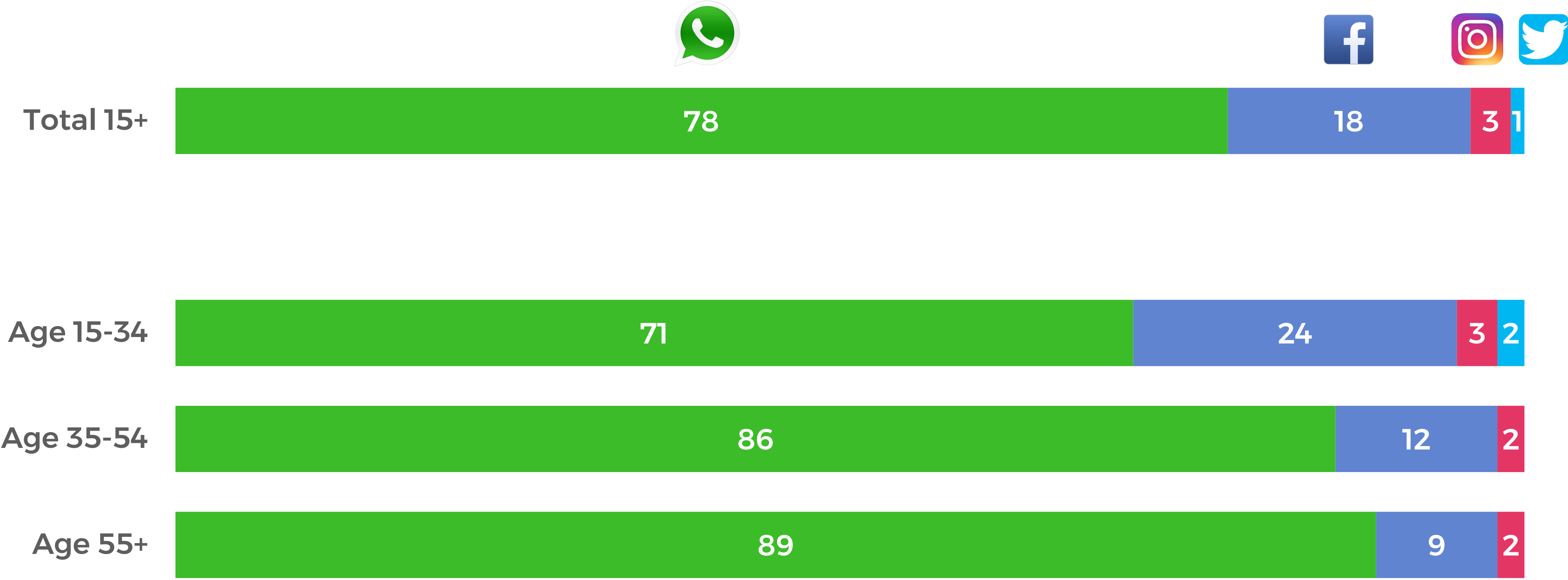
USA TOTAL POPULATION 15+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+

% CURRENTLY USE SOCIAL MEDIA BRAND



Social Media Brand Used Most Often in South Africa

BASE: SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+ WHO USE SOCIAL MEDIA



Observations

- Radio usage continues at a high level in South Africa, in cars and in general

Observations

- The audio space is extremely dynamic with many new forms of audio being used on many devices – especially mobile phones

Observations

- The South African digital audio market lags several years behind the USA and the other surveyed countries on most measures

Observations

- Podcasting is just getting going in South Africa
- The audience to date is highly educated and higher income

Observations

- Digital audio is likely to grow, perhaps rapidly
- There are many opportunities for players in the space, or outside entrants, to power that transition

 THE INFINITE DIAL[®] 2019

The Infinite Dial[®] South Africa



#InfiniteDial

THE INFINITE DIAL © 2019 EDISON RESEARCH