Australia
Presentation Outline

- Executive Summary
- Key Findings
- Total Radio Trends
- Online Audio
- Study Overview & Methodology
- In-Car Audio
- Smart Speakers
- Podcasts

#InfiniteDial

THE INFINITE DIAL AUSTRALIA 2024

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Executive Summary // TL;DR

The Infinite Dial Australia 2024 study by Edison Research confirms that Australian audio consumption remain strong, with radio significantly outperforming the US market. The study reveals continuous growth in online and digital audio platforms, indicating a dynamic and evolving audio landscape.

- Radio reaches 81% of the population; 27% higher than the US.
- Five times more Australians listen to radio than ad-supported Spotify.
- Online streaming among 25-54-year-olds has doubled in three years.
- Podcast listenership increased by 20% in two years, leading globally.
- Radio is the top in-car content choice, with a 76% higher listening rate than other sources.
- Streaming radio listening in cars rose by 75% in two years.
- Smart speaker ownership doubled in four years, now matching the US.
KEY FINDINGS
Radio’s Resilience

94% Listen to Total Audio

81% Listen to Total Radio (Broadcast + Streaming)

77% Watch live free-to-air TV

77% Use streaming video services

52% Watch on-demand free-to-air TV

39% Ad-supported music streaming

% consuming medium in last week
Base: Australian population 12+

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Ad-Supported Audio: Challenges and Opportunities

Only 33% of Spotify listeners can be reached by ads.

16% Ad-supported Spotify

27% Online/Live-streamed Radio

81% Total Radio

5x More Australians are listening to radio than ad-supported Spotify.

% Listened to Audio Source in the Last Week
Base: Australian Population 12+
Surge in Weekly Online Radio Listening Among Adults 25-54

% LISTENED TO AM/FM/DAB+ RADIO ONLINE IN THE LAST WEEK
Base: Australian Population 25-54
Oh, my Pod!

- **United States**
  - 2017: 24%
  - 2018: 26%
  - 2019: 32%
  - 2020: 37%
  - 2021: 41%
  - 2022: 38%
  - 2023: 42%
  - 2024: 47%

- **Australia**
  - 2017: 17%
  - 2018: 18%
  - 2019: 22%
  - 2020: 25%
  - 2021: 37%
  - 2022: 40%
  - 2023: 43%
  - 2024: 48%

% Listened to a Podcast in Last Month
Base: Populations 12+

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Driving Tunes: The Top Audio Sources in Cars

88% Total Radio

Music Streaming* 50%

Podcasts 37%

CDs 30%

Downloaded Music 18%

% USING AUDIO SOURCE IN CAR
BASE: AUSTRALIANS AGE 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 84%

*such as Spotify, YouTube Music, or Apple Music
On the Road to Evolution: The Growth of In-Car Streaming Radio

- 2022: 16%
- 2023: 20%
- 2024: 28%

75% increase in just two years

% listening to streaming radio in car
Base: Australian age 18+, driven/ridden in car in last month, and listen to any audio in the car; 82%
Rising Trend: The Growth of Smart Speaker Ownership

<table>
<thead>
<tr>
<th>Year</th>
<th>United States</th>
<th>Australia</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>2018</td>
<td>8%</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>
<tr>
<td>2023</td>
<td>36%</td>
<td>28%</td>
</tr>
<tr>
<td>2024</td>
<td>34%</td>
<td>34%</td>
</tr>
</tbody>
</table>

%owning a smart speaker  
base: populations 12+
TOTAL RADIO TRENDS
Radio’s Resilience

- 94% Listen to Total Audio
  - 81% Listen to Total Radio (Broadcast + Streaming)
  - 77% Watch live free-to-air TV
  - 77% Use streaming video services
  - 52% Watch on-demand free-to-air TV
  - 39% Ad-supported music streaming

% Consuming medium in last week
Base: Australian population 12+

THE INFINITE DIAL
AUSTRALIA 2024

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ADD WEBINAR SLIDES HERE
Radio’s Resilience

% LISTENED TO AM/FM/DAB+ RADIO ON-AIR OR ONLINE IN THE LAST WEEK
BASE: AUSTRALIAN POPULATION 12+

2021: 79
2022: 79
2023: 79
2024: 81

18 Million
Radio’s Broad Appeal

- Total 12+ Population: 81%
- Age 18-34: 82%
- Age 25-54: 84%
- Age 55+: 79%

% LISTENED TO AM/FM/DAB+ RADIO ON-AIR OR ONLINE IN THE LAST WEEK
BASE: AUSTRALIAN POPULATION 12+
On Top Down Under
Australian Radio reaches 27% more of the population than the US

% LISTENED TO AM/FM/DAB+ RADIO ON-AIR OR ONLINE IN THE LAST WEEK
BASE: POPULATIONS 12+
BROADCAST RADIO RESILIENT AS ONLINE GROWS

<table>
<thead>
<tr>
<th>Type</th>
<th>2022</th>
<th>2023</th>
<th>2024</th>
<th>% LISTENED TO AM/FM/DAB+ RADIO ON-AIR OR ONLINE IN THE LAST WEEK, BY SOURCE</th>
<th>BASE: POPULATIONS 12+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Radio</td>
<td>79</td>
<td>79</td>
<td>81</td>
<td>18 Million</td>
<td></td>
</tr>
<tr>
<td>Broadcast Radio</td>
<td>71</td>
<td>73</td>
<td>75</td>
<td>17 Million</td>
<td></td>
</tr>
<tr>
<td>Streaming Radio</td>
<td>15</td>
<td>27</td>
<td>27</td>
<td>6 Million</td>
<td></td>
</tr>
</tbody>
</table>
I Have a Stream....
Radio Apps and Websites the most common way to listen online

- Radio station's app: 61%
- Radio station's website: 54%
- Aggregator app/website: 38%
- Smart speaker: 36%

% USING SOURCE TO LISTEN TO AM/FM/DAB+ RADIO
BASE: AUSTRALIAN AGE 12+ AND LISTEN TO ONLINE AM/FM/DAB+ RADIO IN THE LAST WEEK; 27%
Online Audio
Online Audio listening on the increase

<table>
<thead>
<tr>
<th>Year</th>
<th>% Listened to Online Audio</th>
<th>Total Australian Population 12+</th>
</tr>
</thead>
<tbody>
<tr>
<td>2021</td>
<td>66</td>
<td>17 Million</td>
</tr>
<tr>
<td>2022</td>
<td>71</td>
<td></td>
</tr>
<tr>
<td>2023</td>
<td>74</td>
<td></td>
</tr>
<tr>
<td>2024</td>
<td>77</td>
<td></td>
</tr>
</tbody>
</table>
Australia is ahead of the US by 9% in online listening
Weekly Online Audio Listening

<table>
<thead>
<tr>
<th></th>
<th>Total 12+ Population</th>
<th>Age 12-34</th>
<th>Age 35-54</th>
<th>Age 55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>% LISTENED TO ONLINE AUDIO IN LAST WEEK</td>
<td>77</td>
<td>93</td>
<td>84</td>
<td>49</td>
</tr>
<tr>
<td>TOTAL AUSTRALIAN POPULATION 12+</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Free vs. Paid Subscriptions to Spotify

- Pay for a subscription: 60%
- Use only free service: 33%
- Listen to someone else’s account: 5%
- Use free trial subscription: 2%

Only a third of Spotify listeners can be reached by advertising.

BASE: AUSTRALIANS AGE 12+ AND LISTENED TO SPOTIFY IN LAST WEEK; 50%
Ad-Supported Audio: Challenges and Opportunities

Only 33% of Spotify listeners can be reached by ads.

16% Ad-supported Spotify
4 Million

27% Online/Live-streamed Radio
6 Million

81% Total Radio
18 Million

5X More Australians are listening to radio than ad-supported Spotify.

% listened to audio source in the last week
Base: Australian Population 12+
Podcasting
Oh, my Pod!

% LISTENED TO A PODCAST IN LAST MONTH
BASE: POPULATIONS 12+

- United States
  - 2017: 24%
  - 2018: 26%
  - 2019: 32%
  - 2020: 37%
  - 2021: 41%
  - 2022: 38%
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- Australia
  - 2017: 17%
  - 2018: 18%
  - 2019: 22%
  - 2020: 25%
  - 2021: 37%
  - 2022: 40%
  - 2023: 43%
  - 2024: 48%
Podcasting Appeals to All Ages

% LISTENED TO A PODCAST IN LAST MONTH

TOTAL AUSTRALIAN POPULATION 12+

- Total 12+: 48
- Age 18-24: 65
- Age 25-39: 65
- Age 40-54: 47
- Age 55-64: 35
- Age 65+: 21
Podcasts: Audio on demand for busy consumers

- Smartphone/tablet: 91%
- Computer: 47%
- In-car dashboard (such as Apple CarPlay and Android Auto): 47%
- Smart TV: 33%
- Smart speaker: 25%

% LISTENED TO A PODCAST IN LOCATION

BASE: AUSTRALIANS AGE 12+ AND LISTENED TO PODCAST IN LAST MONTH; 48%
Podcasts: Where it suits listeners

- Home: 51%
- Car/truck: 20%
- Walking: 9%
- Riding public transportation: 7%
- At work: 7%
- Gym/working out: 5%
- Other: 1%

BASE: AUSTRALIANS AGE 12+ AND LISTENED TO PODCAST IN LAST MONTH; 48%
Pod Squad: Original Content + Catch-Up Radio on the rise

- **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>
<td>22</td>
<td>11</td>
</tr>
<tr>
<td>2021</td>
<td>35</td>
<td>14</td>
</tr>
<tr>
<td>2022</td>
<td>35</td>
<td>16</td>
</tr>
<tr>
<td>2023</td>
<td>43</td>
<td>27</td>
</tr>
<tr>
<td>2024</td>
<td>48</td>
<td>32</td>
</tr>
</tbody>
</table>

% listened to type of podcast at least once a month
Total Australian population 12+
Smart Speakers
Rising Trend: The Growth of Smart Speaker Ownership

United States

- 2017: 7%
- 2018: 8%
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Australia

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% Owning a Smart Speaker
Base: Populations 12+
Smart Speaker Ownership

<table>
<thead>
<tr>
<th>Brand</th>
<th>2022</th>
<th>2023</th>
<th>2024</th>
</tr>
</thead>
<tbody>
<tr>
<td>Google Nest</td>
<td>23</td>
<td>23</td>
<td>26</td>
</tr>
<tr>
<td>Amazon Alexa</td>
<td>5</td>
<td>6</td>
<td>11</td>
</tr>
<tr>
<td>Apple HomePod</td>
<td>2</td>
<td></td>
<td>4</td>
</tr>
</tbody>
</table>

% Owning Smart Speaker Brand

Total Australian Population 12+
Smart Speaker Listening

<table>
<thead>
<tr>
<th>U.S.</th>
<th>Australia</th>
</tr>
</thead>
<tbody>
<tr>
<td>60</td>
<td>65</td>
</tr>
</tbody>
</table>

% LISTENED TO SMART SPEAKER IN LAST MONTH
BASE: SMART SPEAKER OWNERS AGE 12+
Number of Smart Speakers in Australian Homes

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

<table>
<thead>
<tr>
<th>Year</th>
<th>One</th>
<th>Two</th>
<th>Three or More</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023</td>
<td>58</td>
<td>20</td>
<td>22</td>
<td>1.9</td>
</tr>
<tr>
<td>2024</td>
<td>50</td>
<td>24</td>
<td>26</td>
<td>2.2</td>
</tr>
</tbody>
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In-Car Audio
On the Road to Evolution: The Growth of In-Car Streaming Radio

% listening to streaming radio in car
Base: Australian age 18+, driven/ridden in car in last month, and listen to any audio in the car; 82%

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75% increase in just two years
Driving Tunes: The Top Audio Sources in Cars

- **Total Radio**: 88%
- **Music Streaming**: 50%
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- **CD**: 30%
- **Downloaded Music**: 18%

% USING AUDIO SOURCE IN CAR
BASE: AUSTRALIANS AGE 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 84%

*such as Spotify, YouTube music, or Apple music
The connected Car is on the rise

BASE: AUSTRALIAN AGE 18+, DRIVEN/RIDDEN IN CAR IN LAST MONTH; 87%
% HAVE APPLE CARPLAY OR ANDROID AUTO IN PRIMARY VEHICLE
Radio dominates in the connected Car

AM/FM/DAB+ radio: 89%
(Music Streaming*): 74%
Podcasts: 61%
CD player: 25%
Downloaded Music: 25%

*SUCH AS SPOTIFY, YOUTUBE MUSIC, OR APPLE MUSIC

BASE: AUSTRALIAN AGE 18+, HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; AND USE CARPLAY/ANDROID AUTO IN CAR 37%
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.

- This is the eighth annual Infinite Dial Australia report since its debut in 2017.

- This study is designed to allow for direct comparisons among Australia, New Zealand, and the U.S.
Study Methodology

• In the first quarter of 2024, Edison Research conducted a national survey of 1,719 respondents in Australia aged 12 and older
  - 1,421 interviews conducted online
  - 298 interviews conducted via telephone
• Data weighted to national 12+ population figures
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Australia