

 THE INFINITE DIAL 2023

The Infinite Dial 2023

Australia



#InfiniteDial

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Presentation Outline



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

 THE INFINITE DIAL 2023

AM/FM/DAB+ RADIO



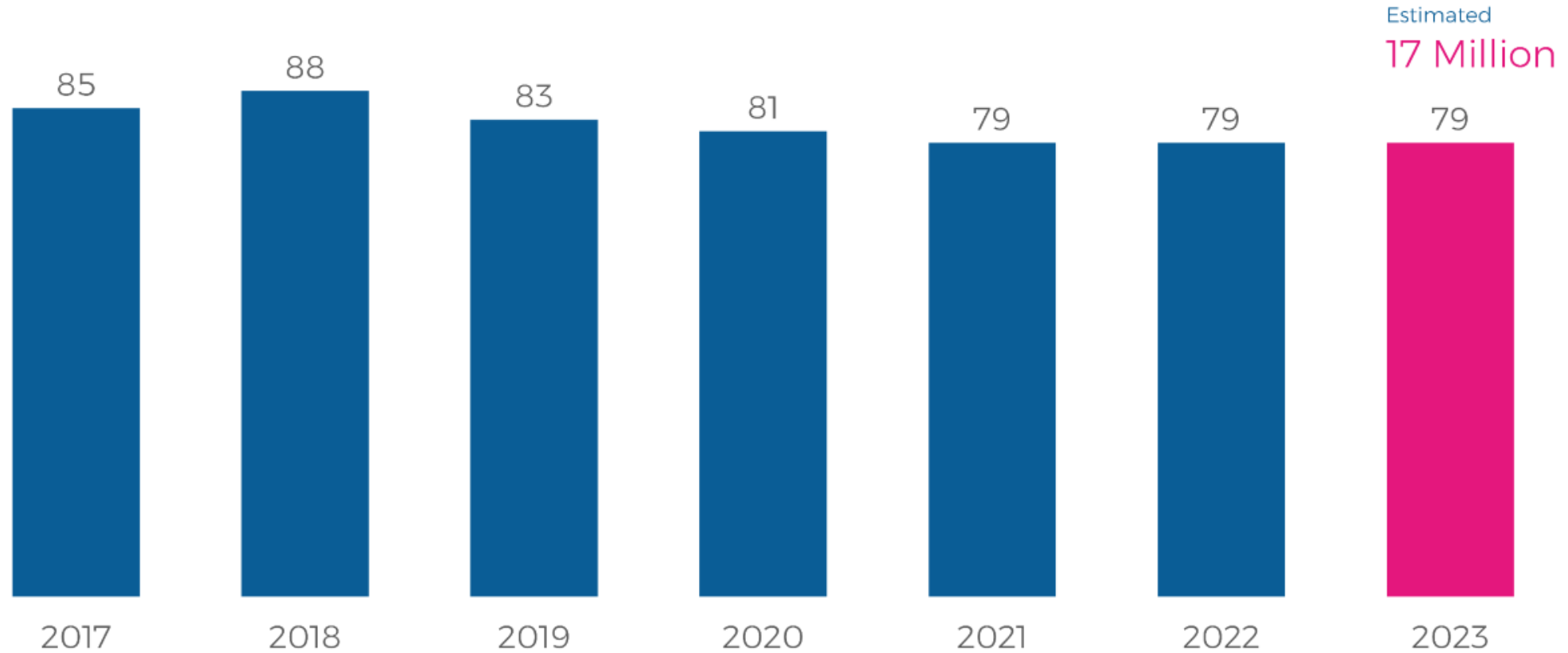
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Listening to AM/FM/DAB+ Radio in the Last Week

TOTAL AUSTRALIAN POPULATION 12+

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

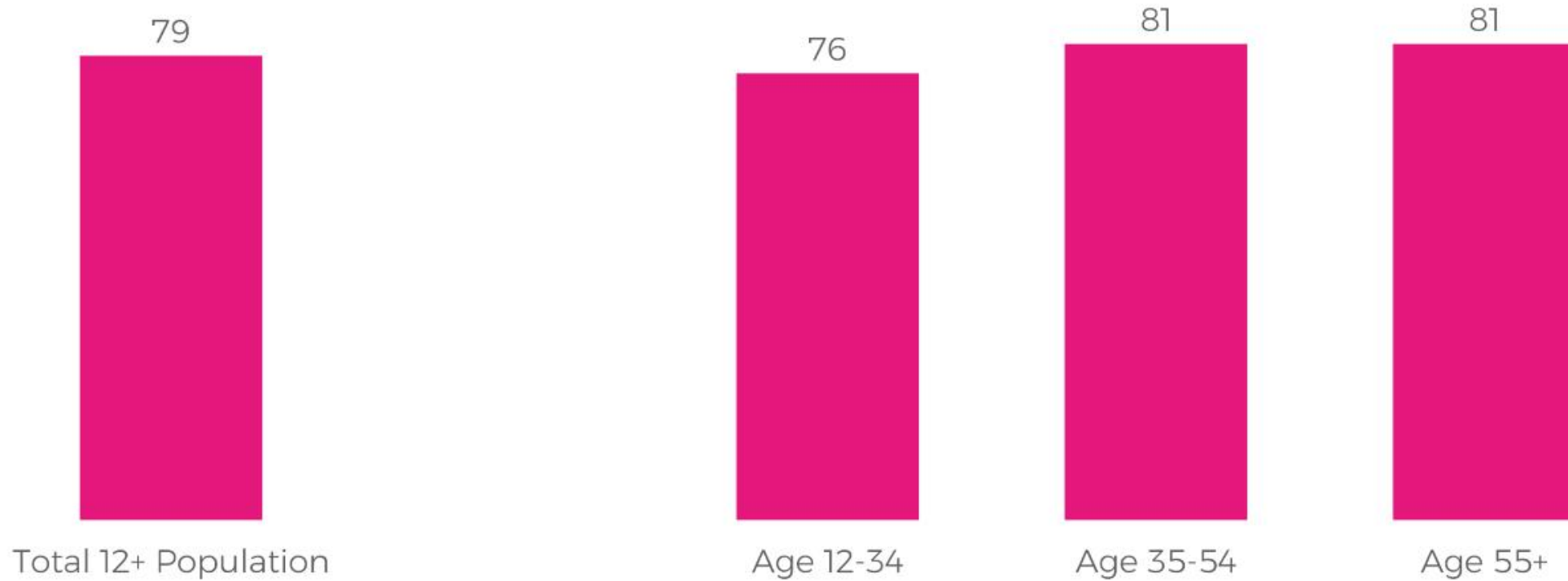


AM/FM/DAB+ RADIO INCLUDES BOTH OVER-THE-AIR AND ONLINE

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



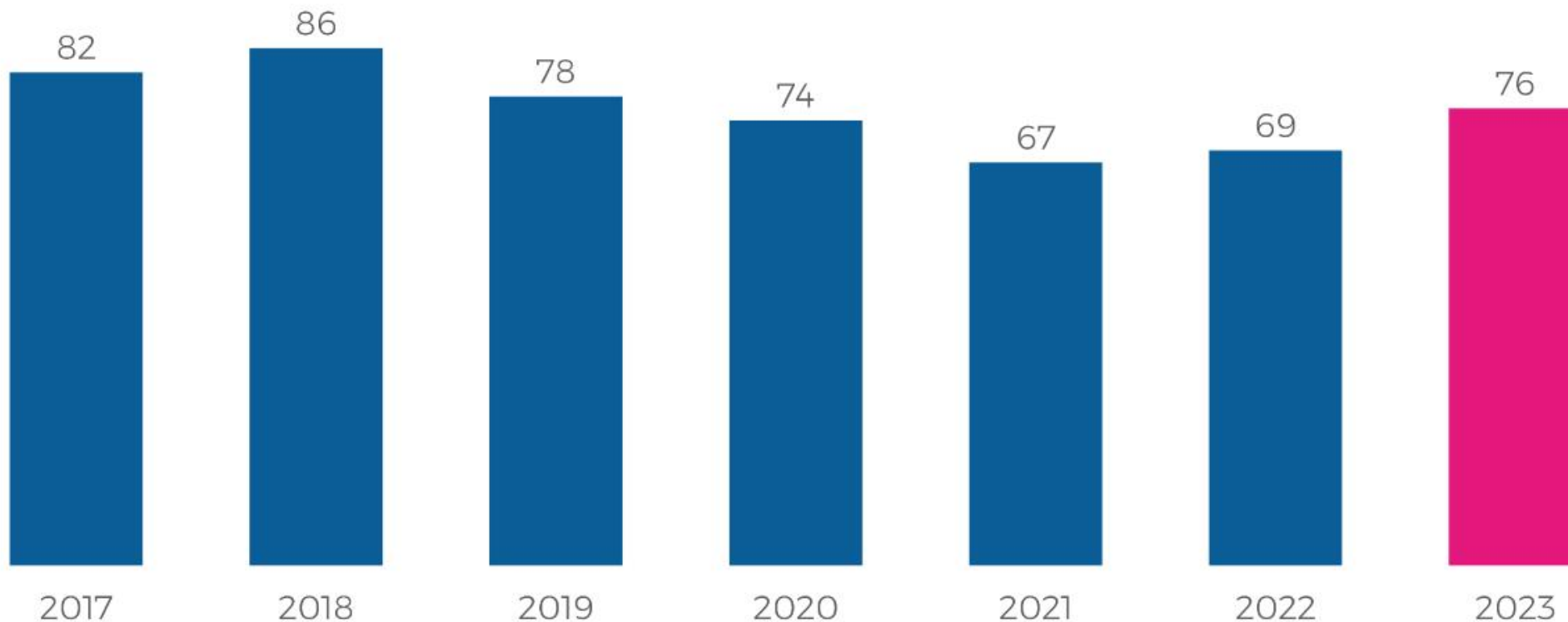
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Listening to AM/FM/DAB+ Radio in the Last Week (Age 12-34)

TOTAL AUSTRALIAN POPULATION 12+

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

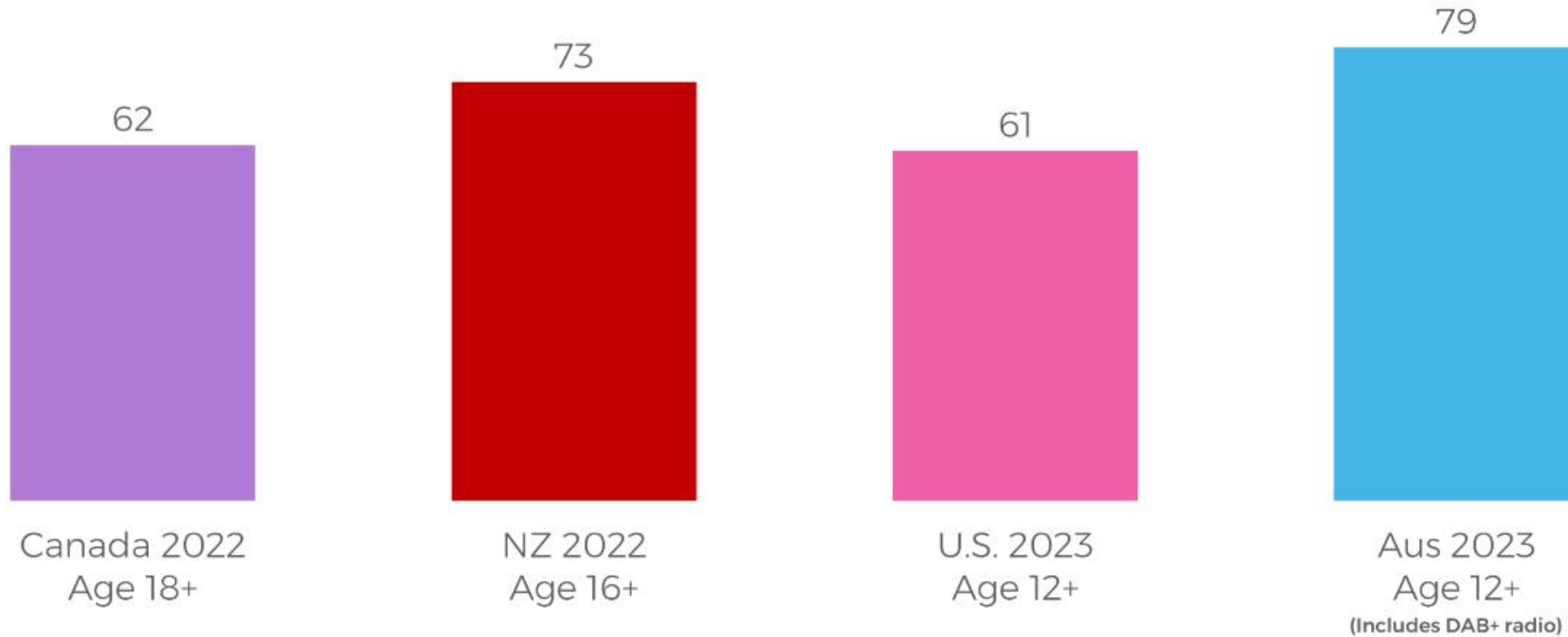


AM/FM/DAB+ RADIO INCLUDES BOTH OVER-THE-AIR AND ONLINE

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

TOTAL POPULATIONS

% LISTENED TO AM/FM RADIO IN THE LAST WEEK



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



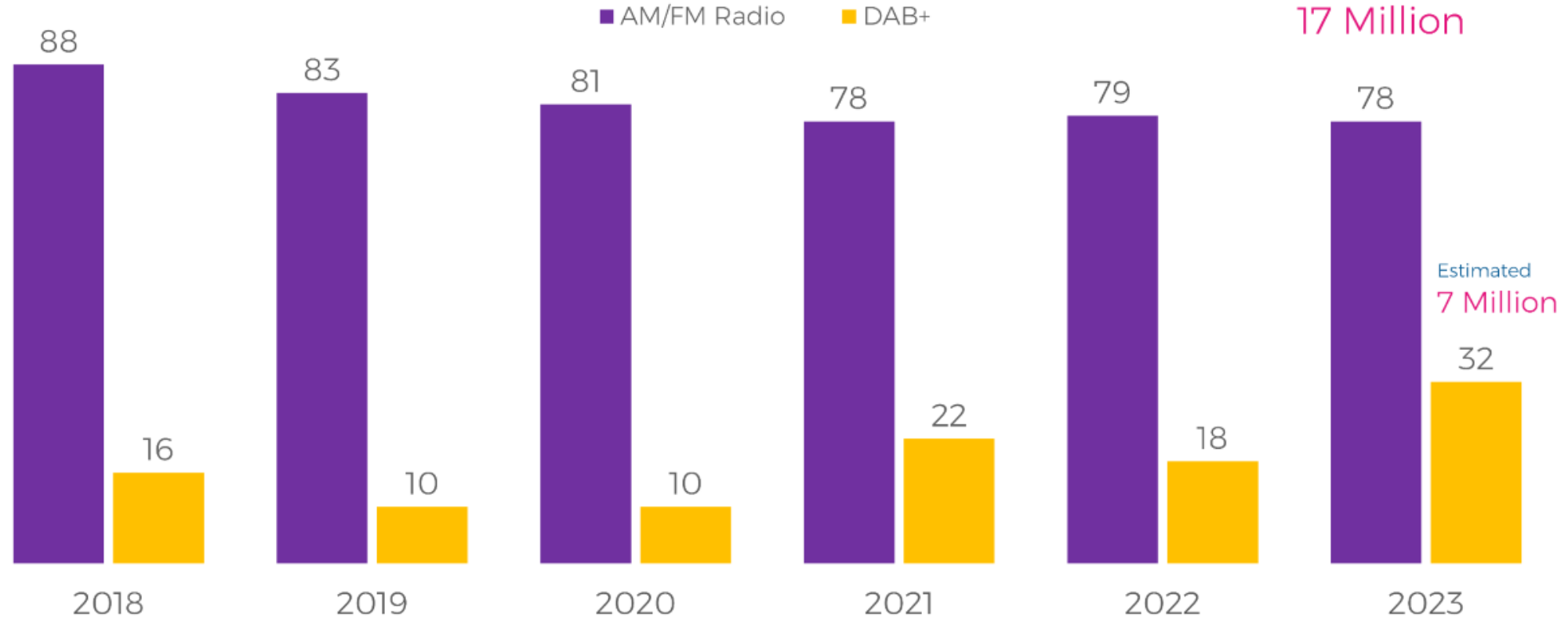
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Listening to AM/FM/DAB+ Radio in the Last Week

TOTAL AUSTRALIAN POPULATION 12+

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



Estimated
17 Million

Estimated
7 Million

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



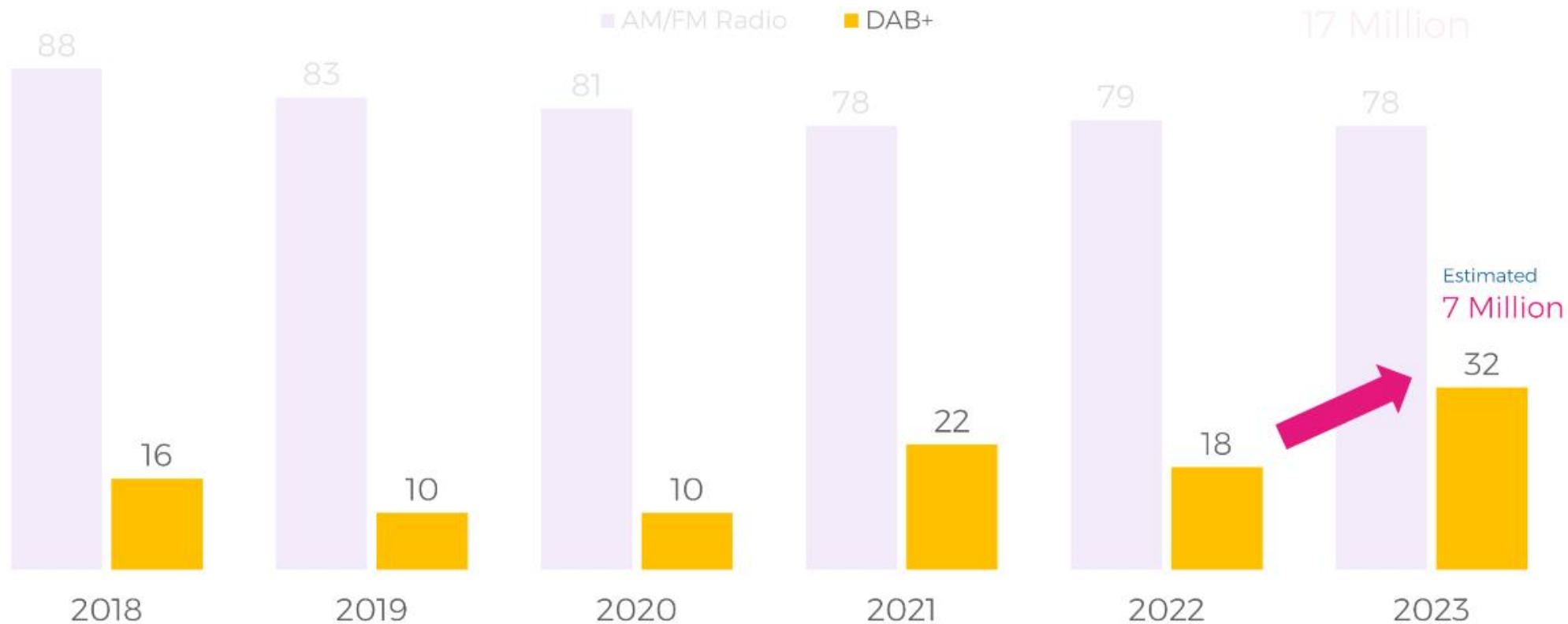
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Listening to AM/FM/DAB+ Radio in the Last Week

TOTAL AUSTRALIAN POPULATION 12+

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

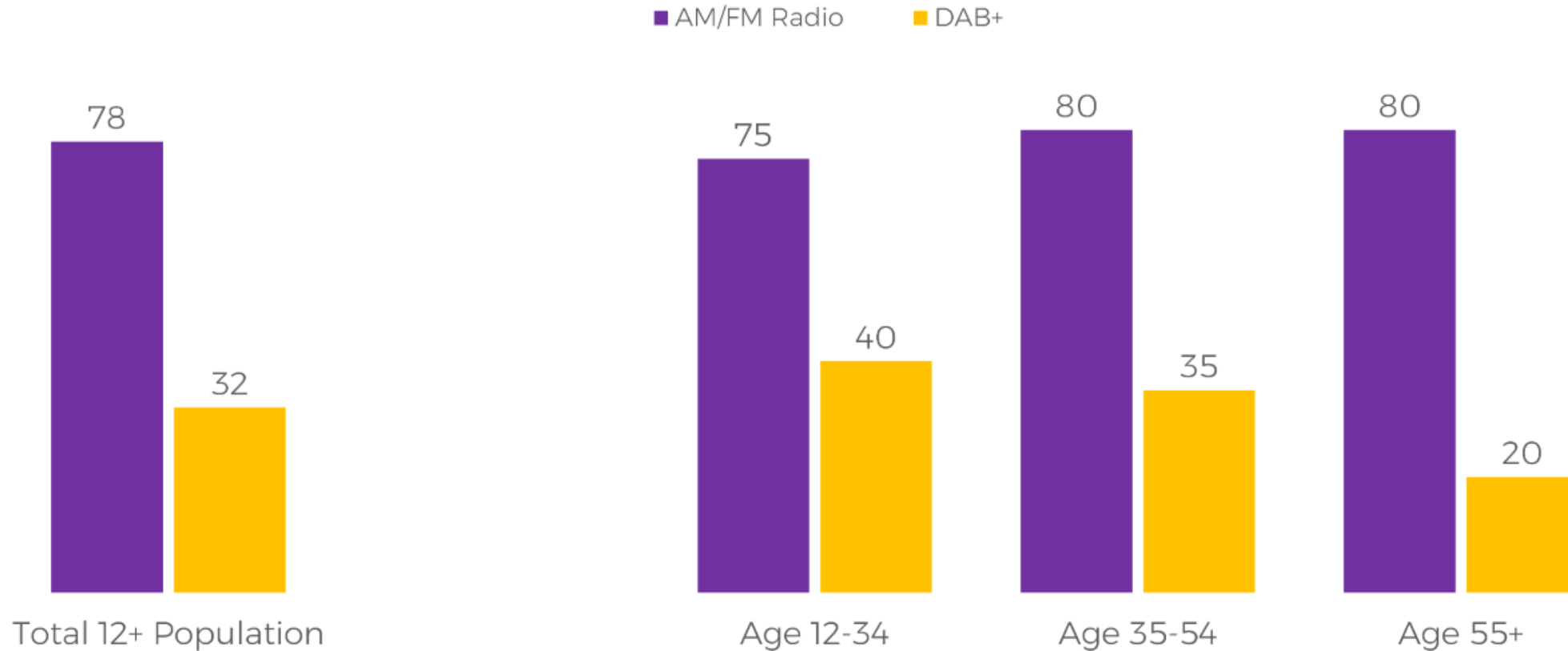


AM/FM/DAB+ RADIO INCLUDES BOTH OVER-THE-AIR AND ONLINE

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

TOTAL AUSTRALIAN POPULATION 12+

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

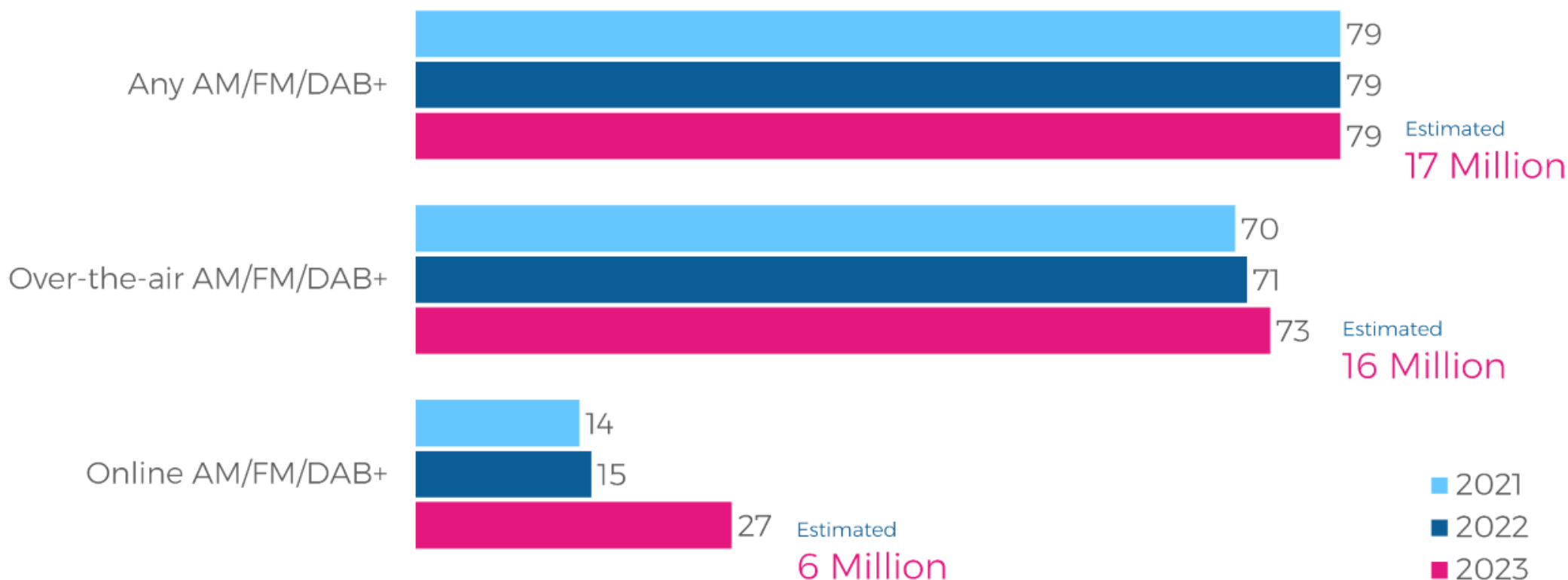


AM/FM/DAB+ RADIO INCLUDES BOTH OVER-THE-AIR AND ONLINE

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

TOTAL AUSTRALIAN POPULATION 12+

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

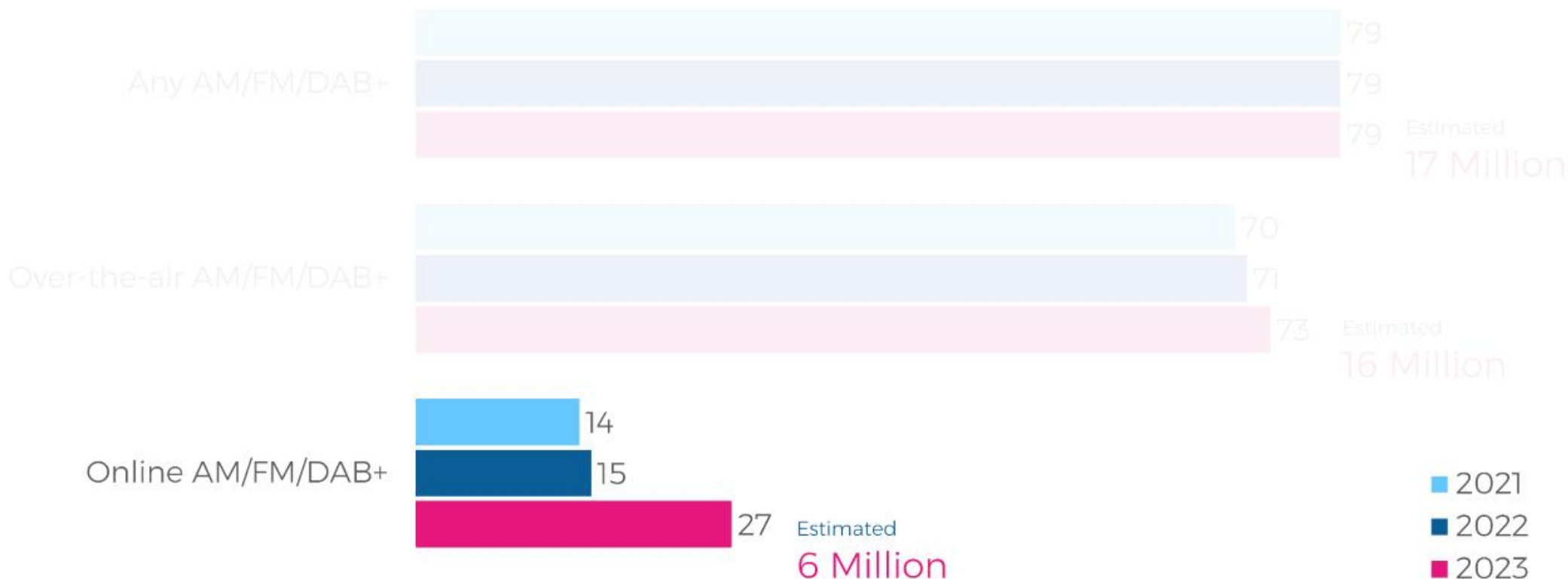


2021
2022
2023

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

TOTAL AUSTRALIAN POPULATION 12+

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



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:



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

TOTAL POPULATIONS

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



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Online Audio



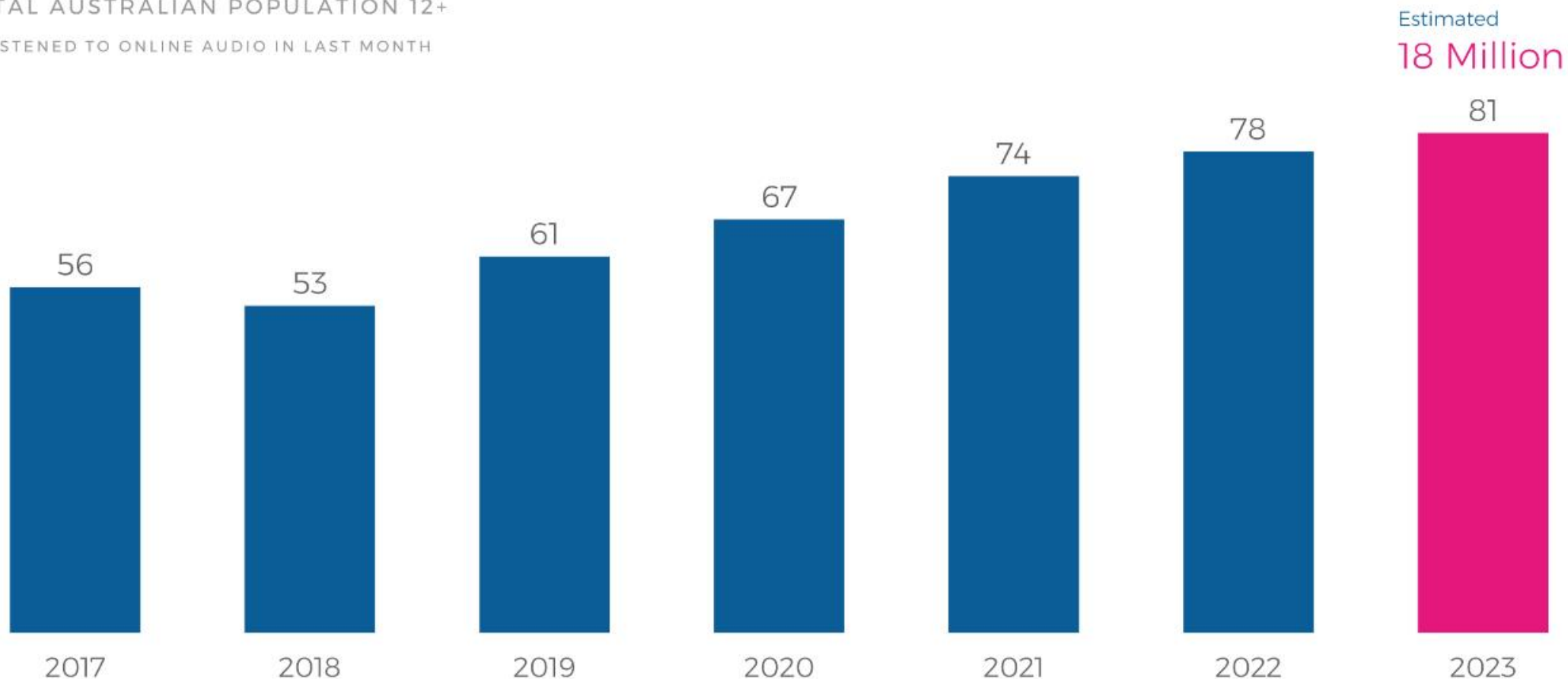
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Monthly Online Audio Listening

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO ONLINE AUDIO IN LAST MONTH



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

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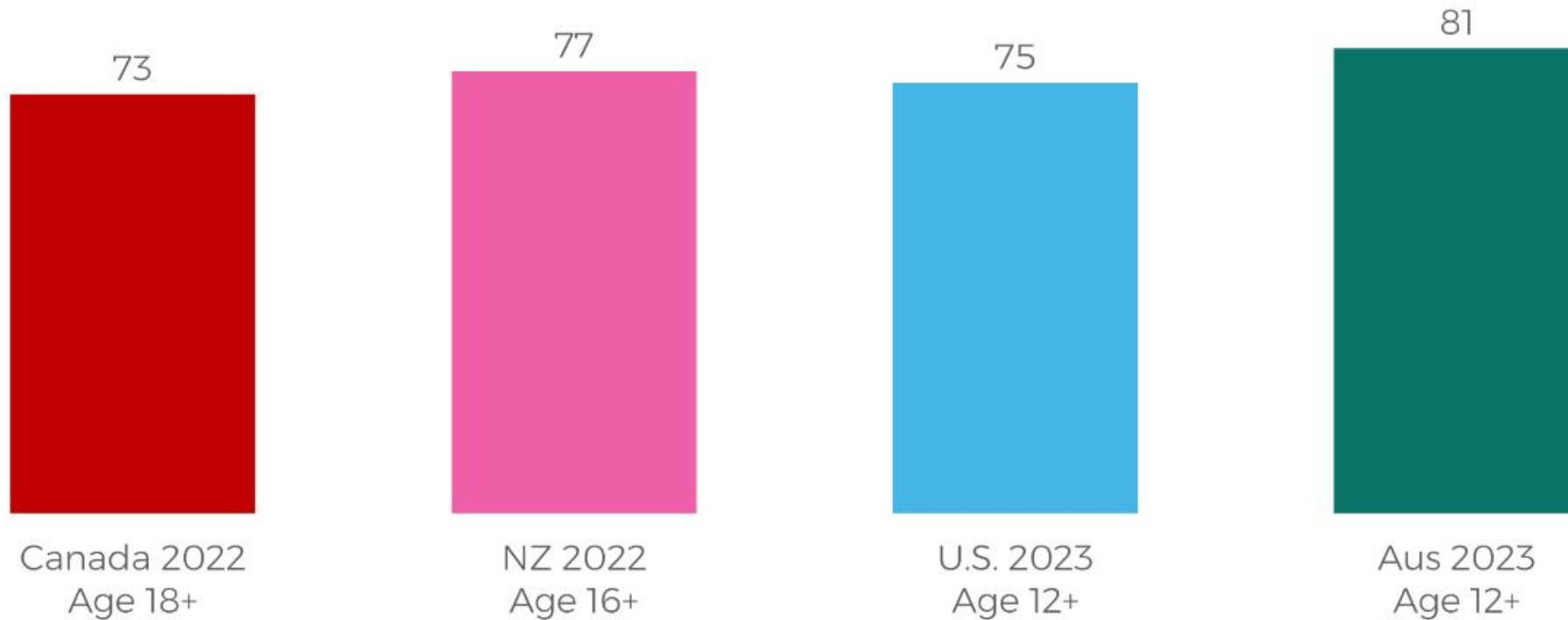


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Monthly Online Audio Listening

TOTAL AUSTRALIAN POPULATION 12+

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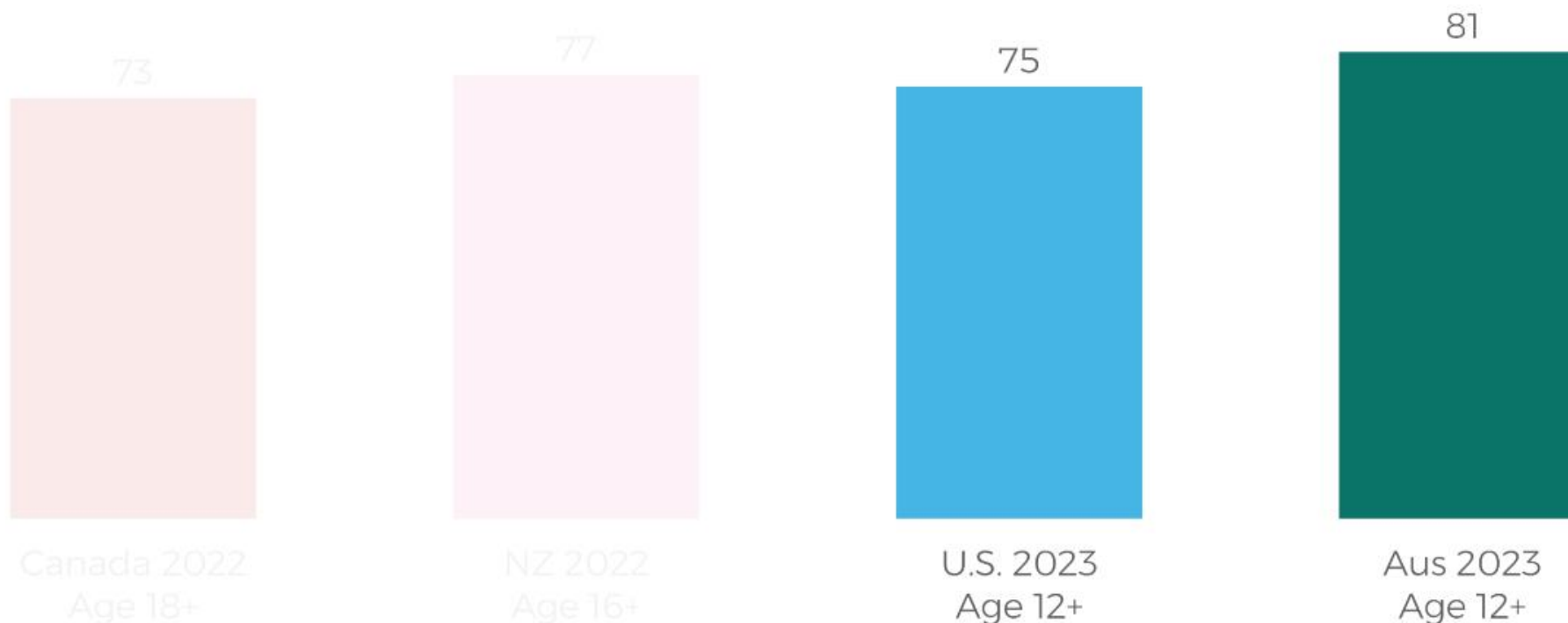
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Monthly Online Audio Listening

TOTAL AUSTRALIAN POPULATION 12+

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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

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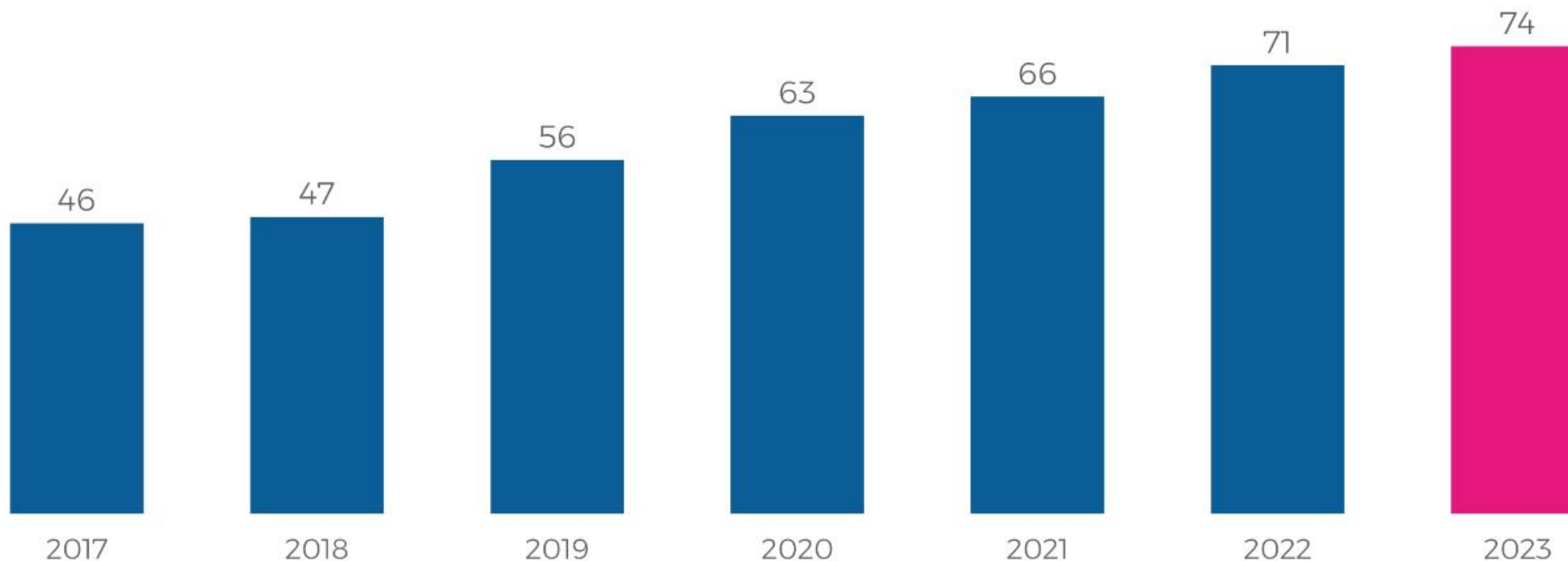


Weekly Online Audio Listening

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

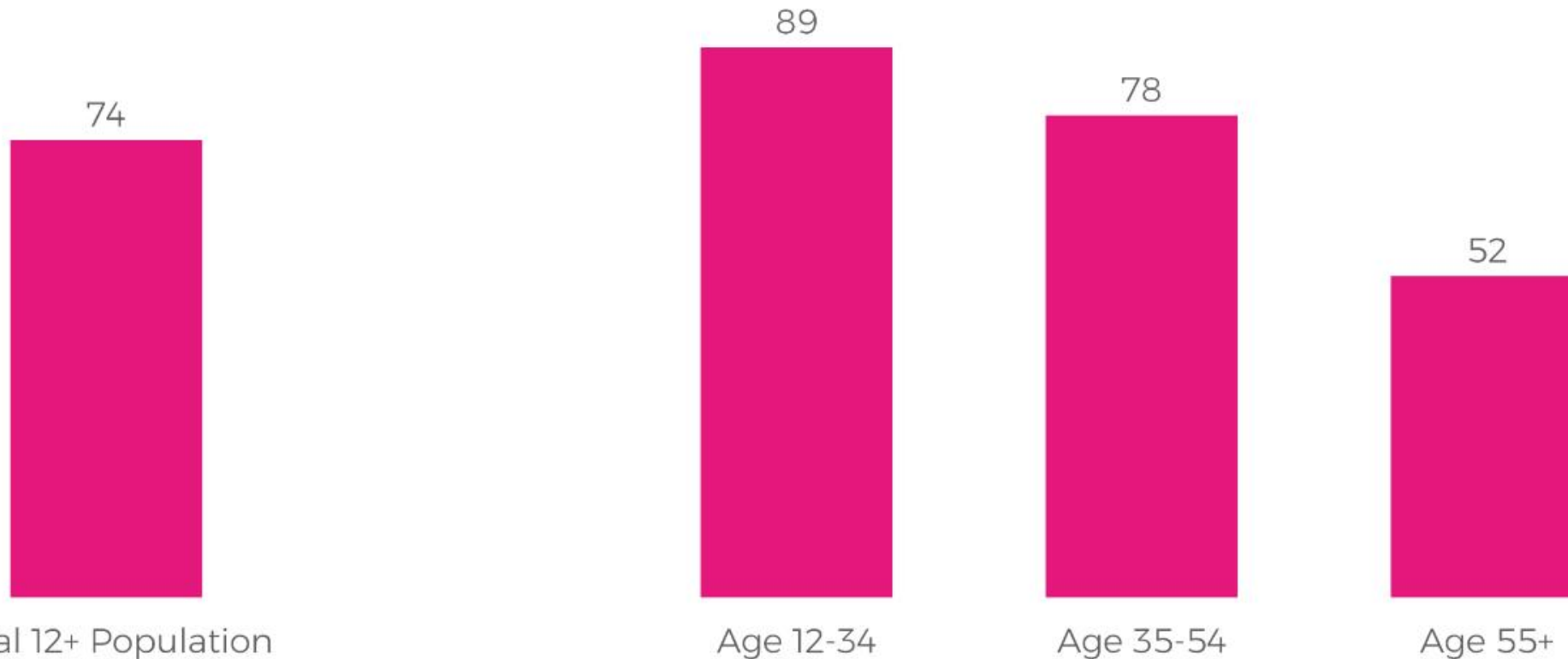
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Weekly Online Audio Listening

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO ONLINE AUDIO IN LAST WEEK



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

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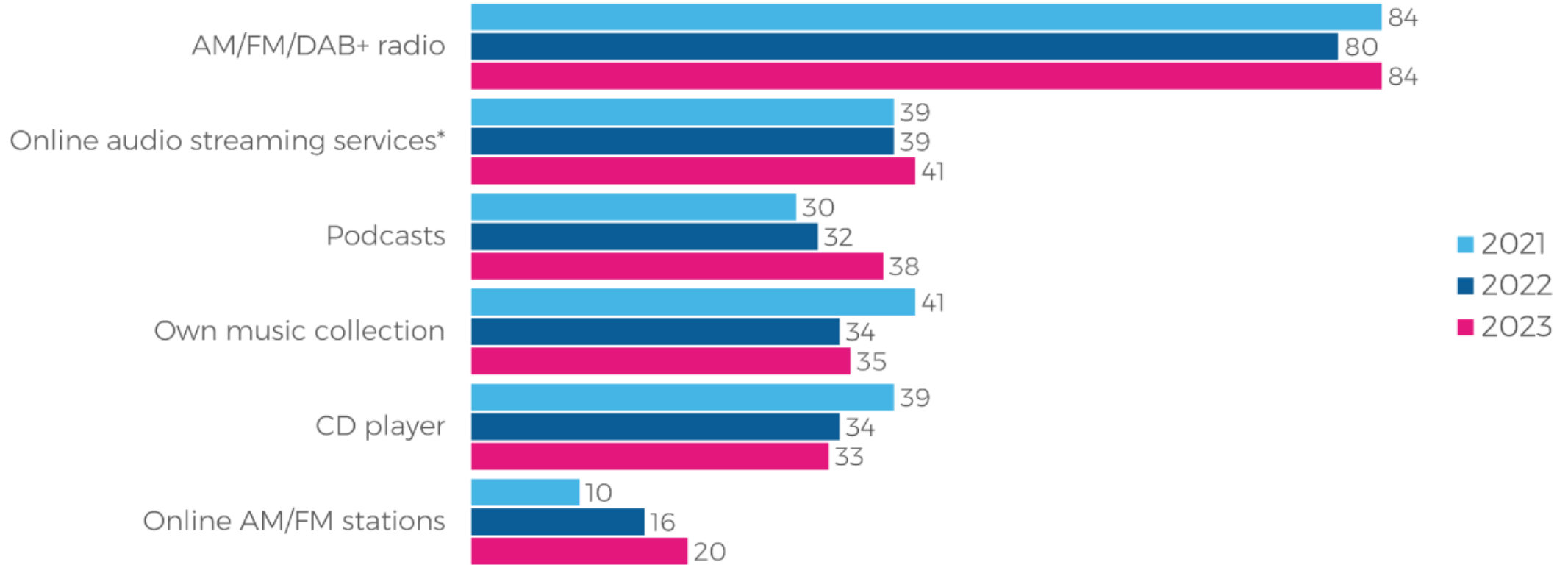


In-Car Media

Audio Sources Used in Car

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

% USING AUDIO SOURCE IN CAR

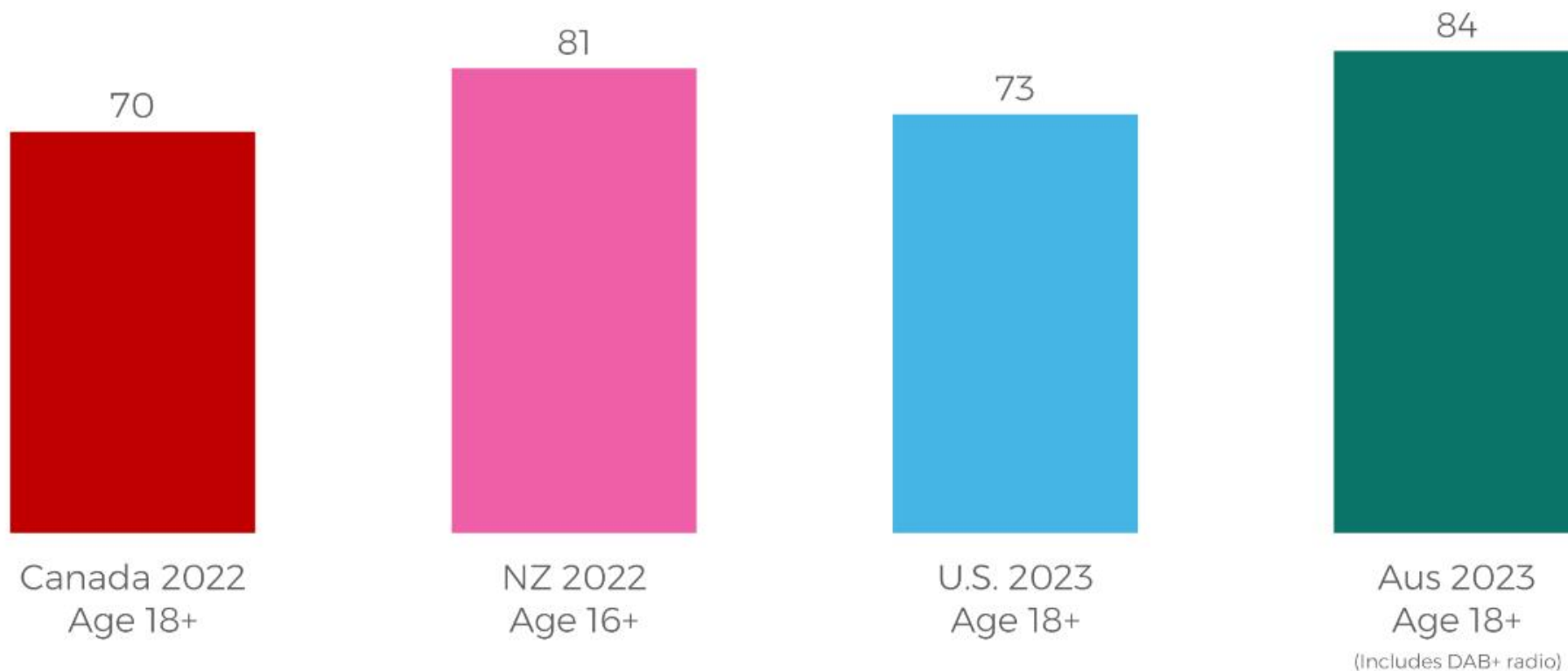


*SUCH AS SPOTIFY, YOUTUBE MUSIC, OR APPLE MUSIC

AM/FM/DAB+ Radio Usage in Car

BASE: HAVE DRIVEN/RIDDEN IN CAR IN LAST MONTH

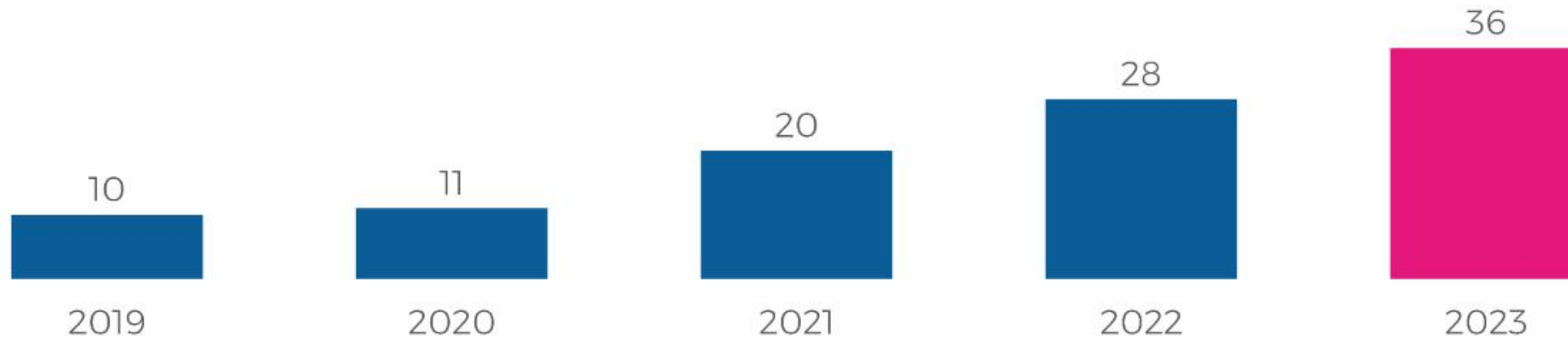
% EVER USE AM/FM/DAB+ RADIO IN CAR



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

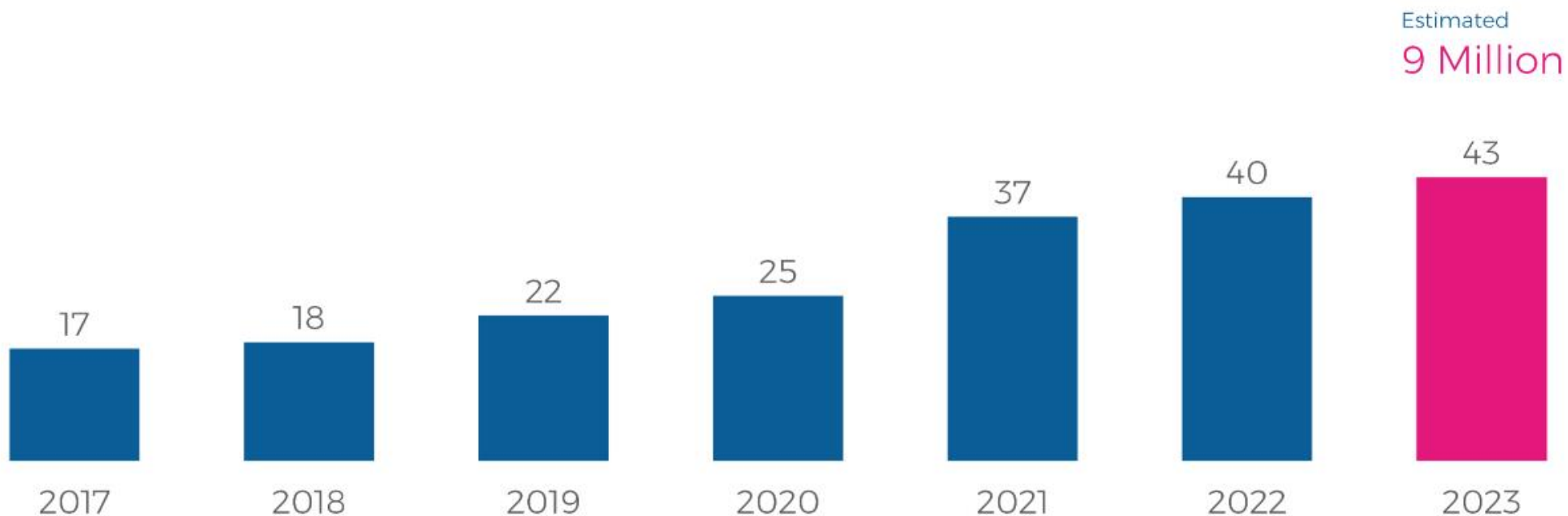


Podcasting

Monthly Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+

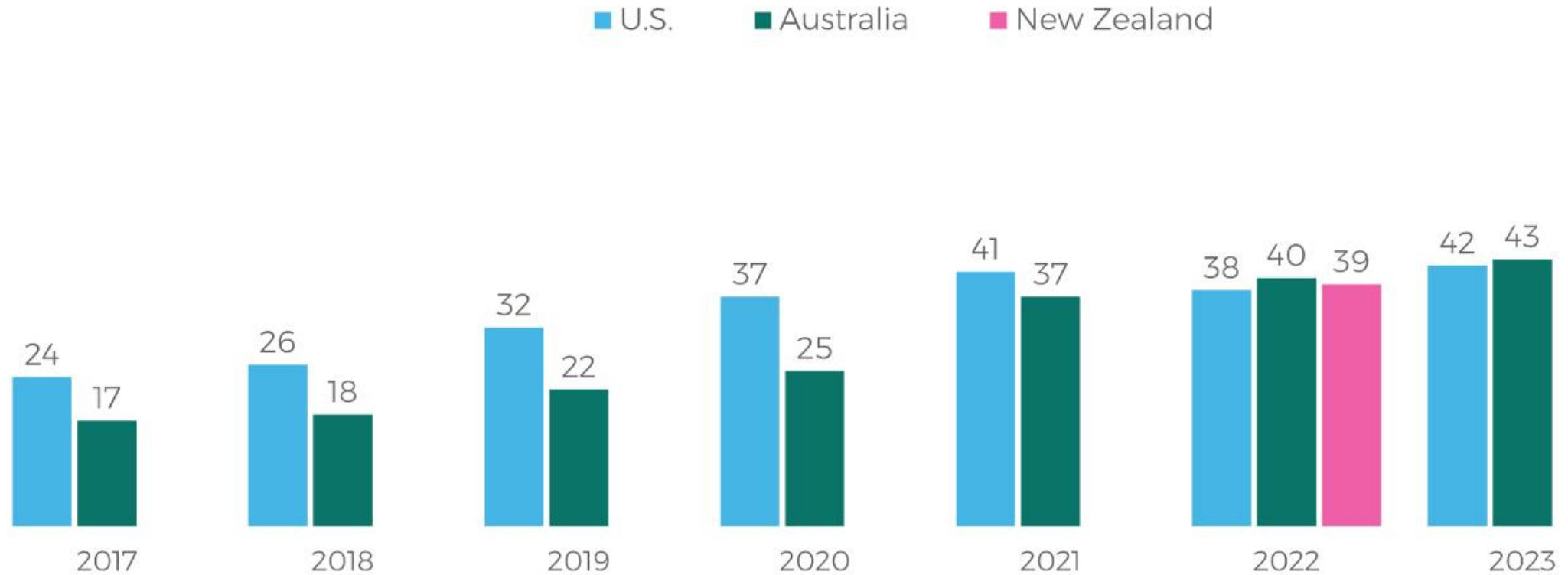
% LISTENED TO A PODCAST IN LAST MONTH



Monthly Podcast Listening

TOTAL POPULATIONS

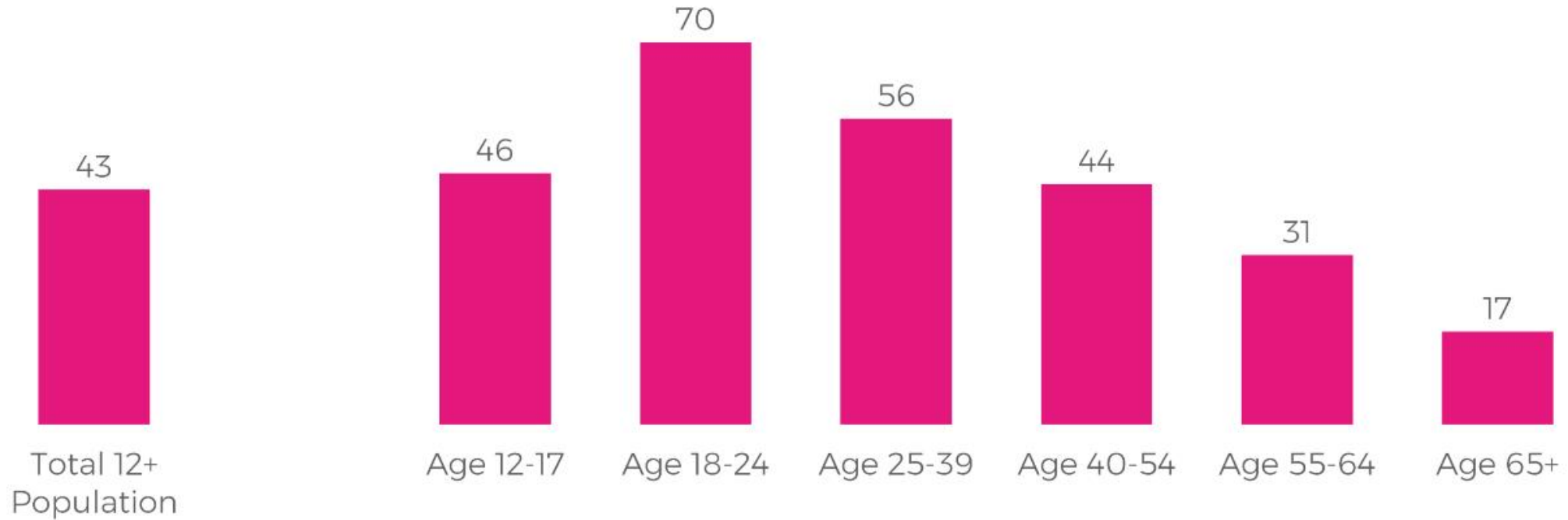
% LISTENED TO A PODCAST IN LAST MONTH



Monthly Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+

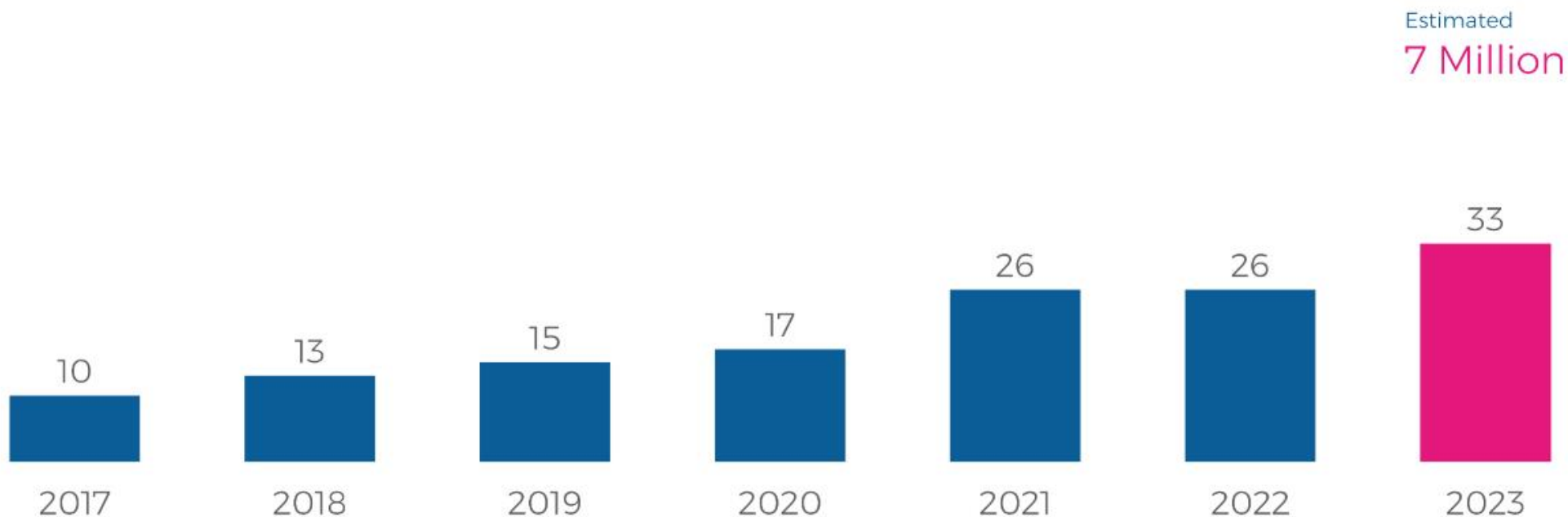
% LISTENED TO A PODCAST IN LAST MONTH



Weekly Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+

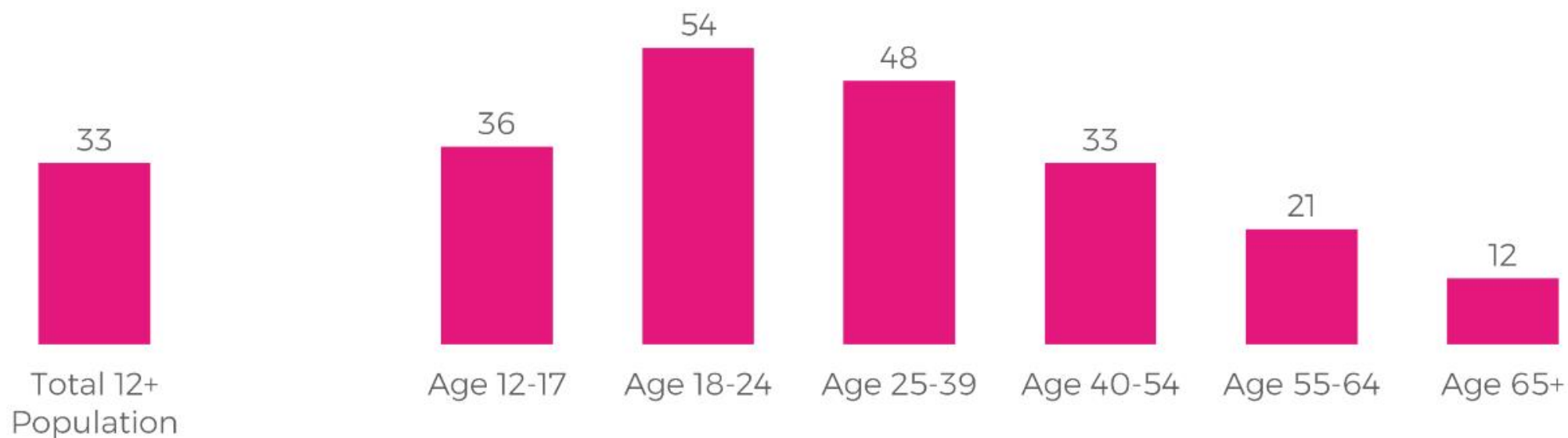
% LISTENED TO A PODCAST IN LAST WEEK



Weekly Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO A PODCAST IN LAST WEEK



Weekly Podcast Listening

TOTAL POPULATIONS

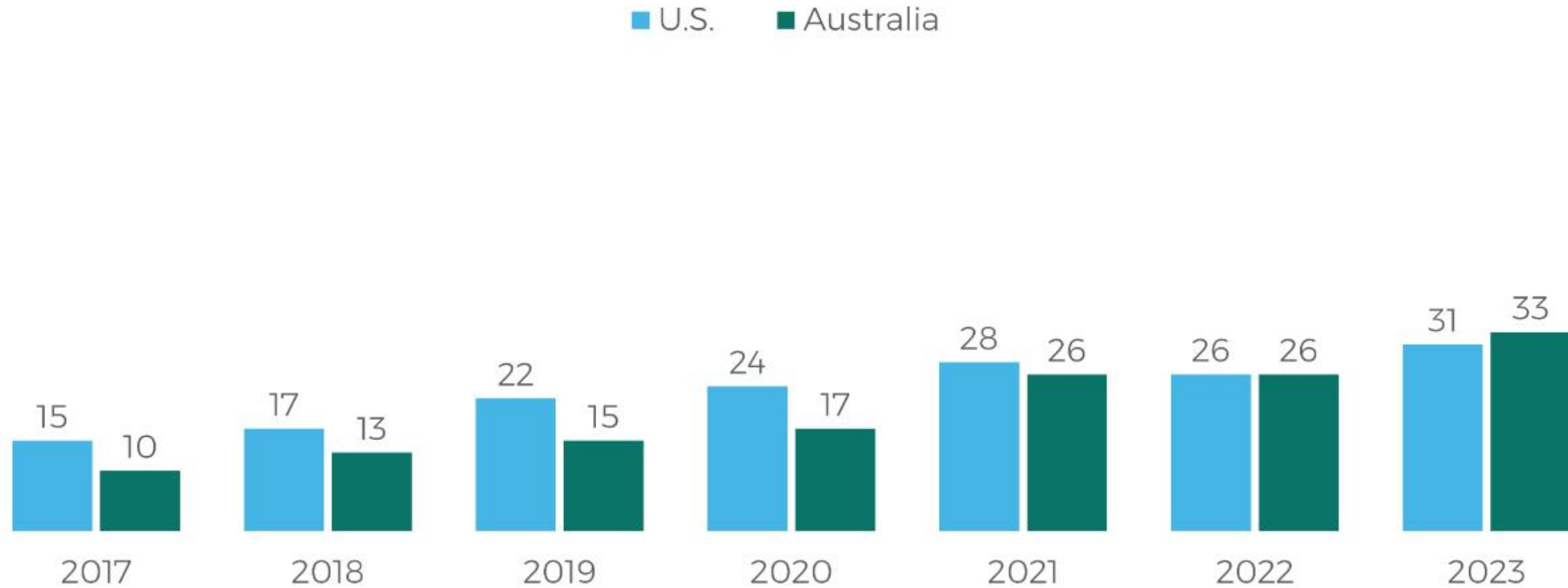
% LISTENED TO A PODCAST IN LAST WEEK



Weekly Podcast Listening

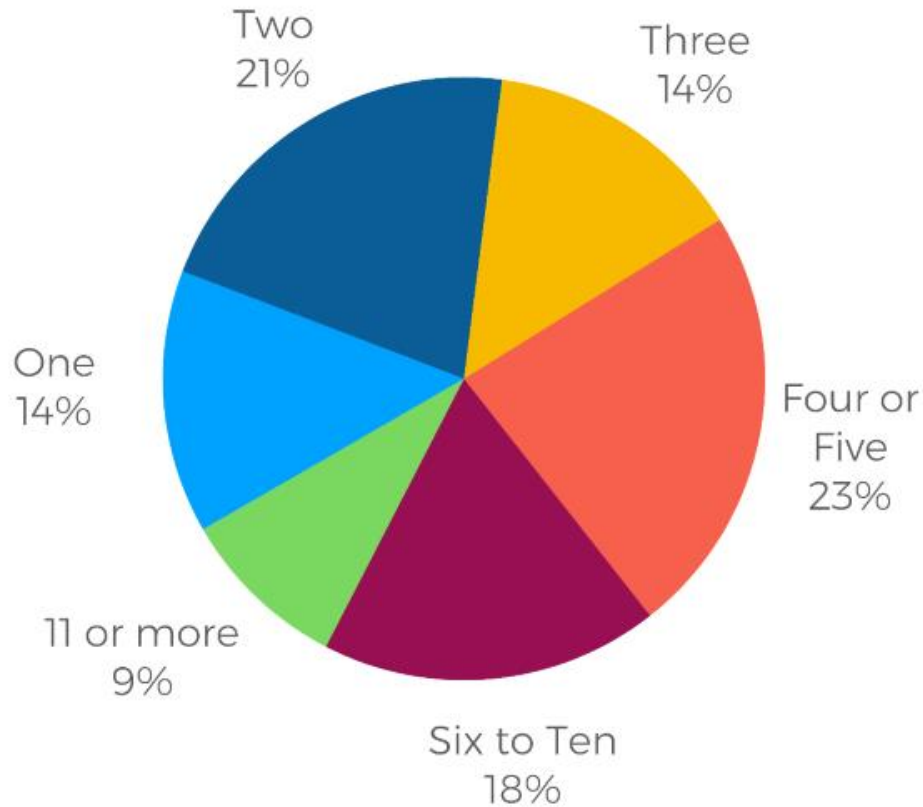
TOTAL POPULATIONS

% LISTENED TO A PODCAST IN LAST WEEK



Number of Podcast Episodes Listened to in Last Week

BASE: AUSTRALIANS AGE 12+ AND LISTENED TO PODCAST IN LAST WEEK; 33%



Australian weekly podcast listeners averaged

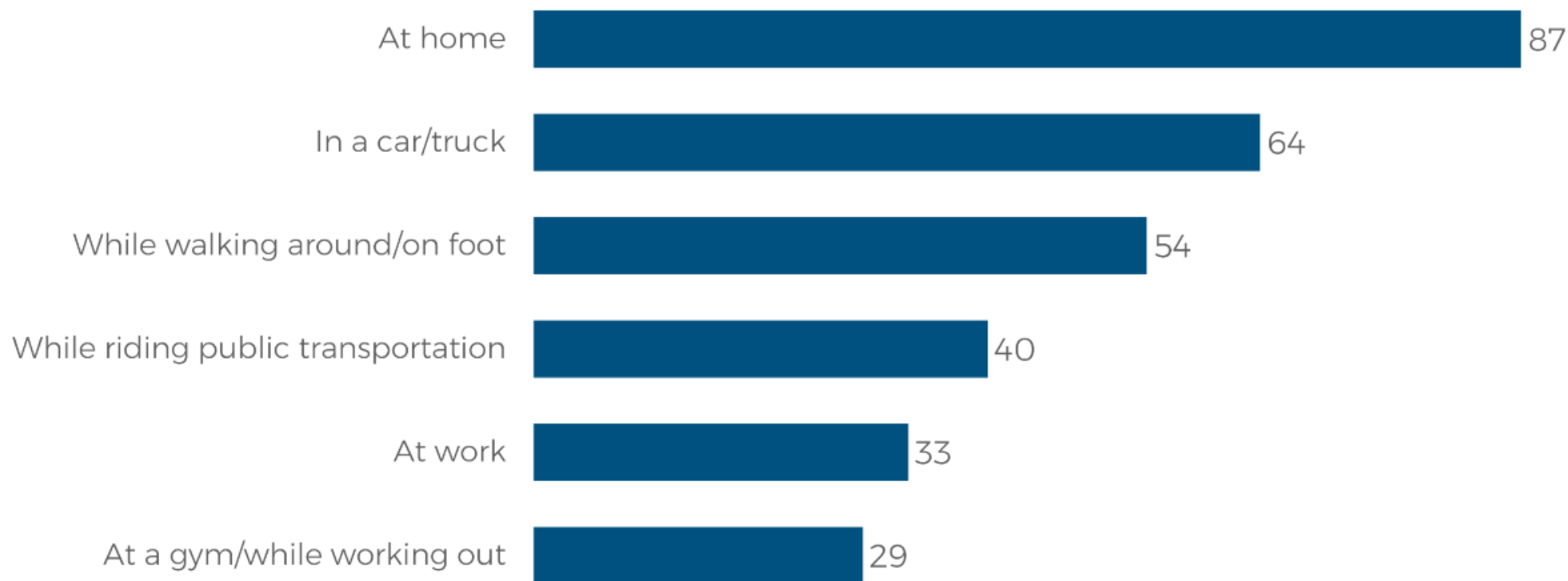
five episodes

in the last week

Podcast Listening Locations

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

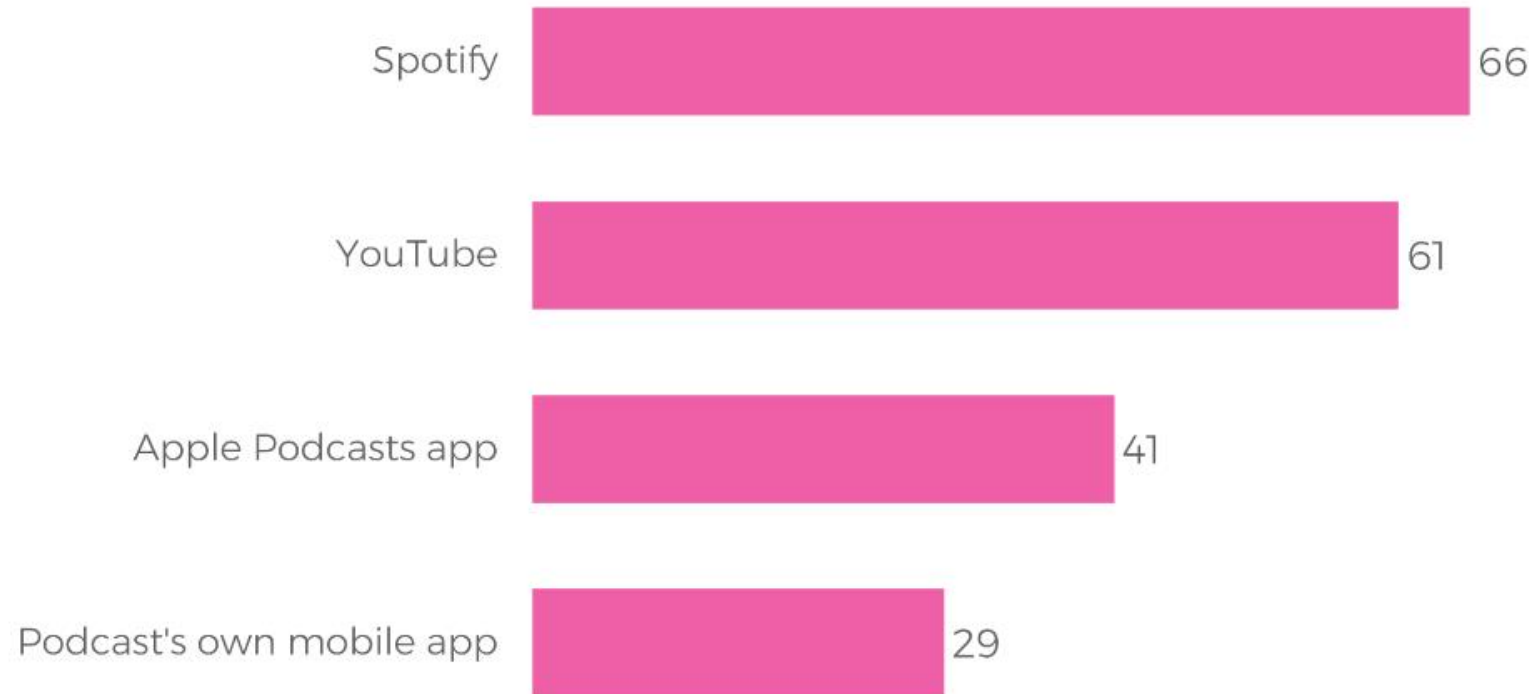
% LISTENED TO A PODCAST IN LOCATION



Services Used to Listen to Podcasts

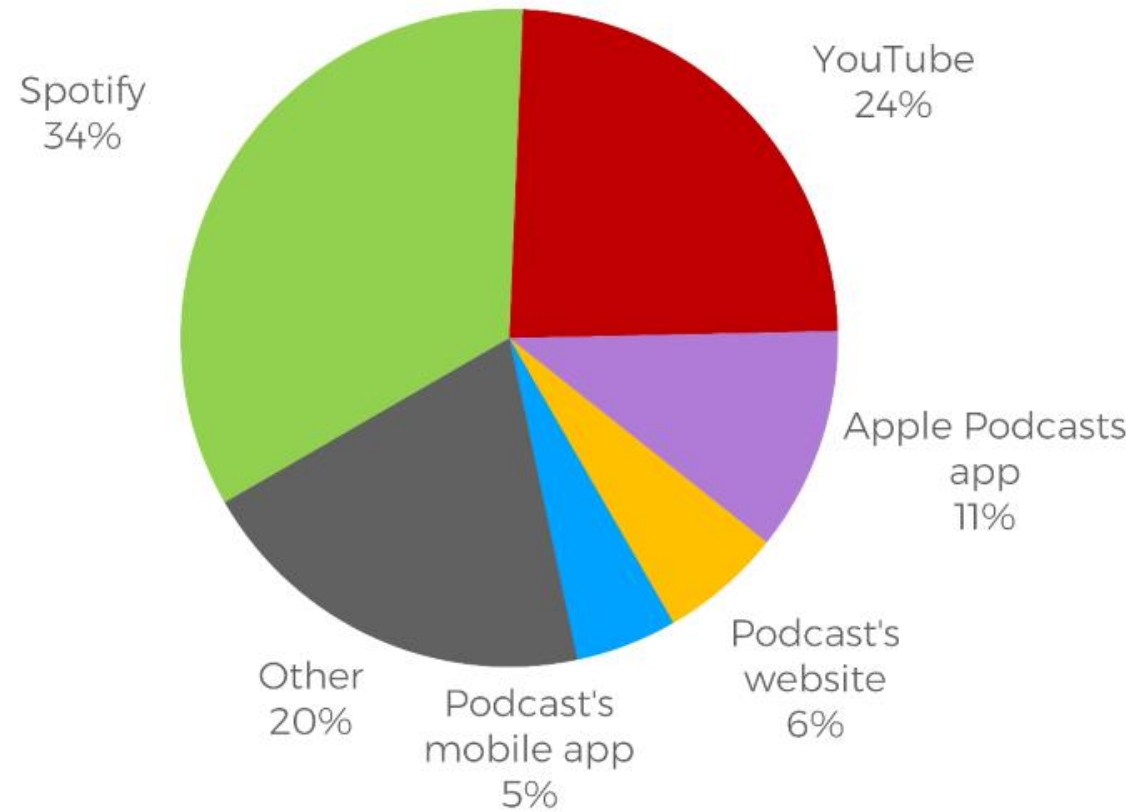
BASE: AUSTRALIANS AGE 12+ AND LISTENED TO PODCAST IN LAST MONTH; 43%

% CURRENTLY EVER LISTEN TO PODCASTS ON SERVICE



Service Used Most Often to Listen to Podcasts

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



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



60%
listen to any podcast with a video component

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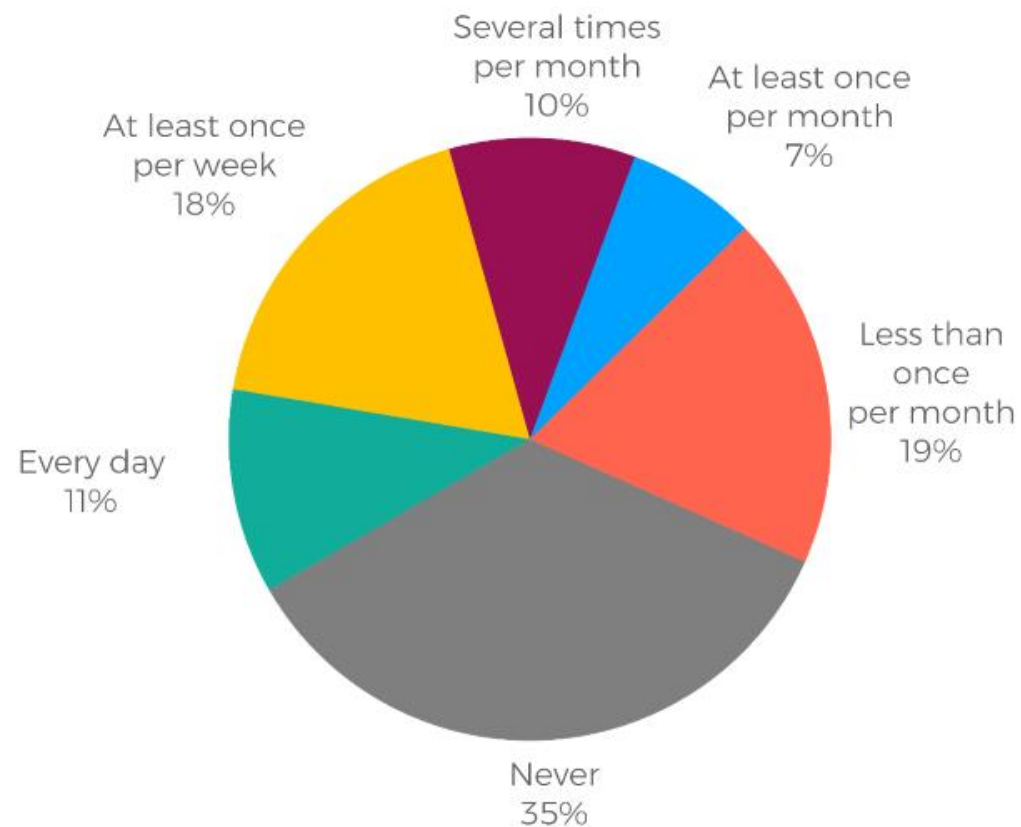
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Frequency of Listening to Podcasts

TOTAL AUSTRALIAN POPULATION 12+

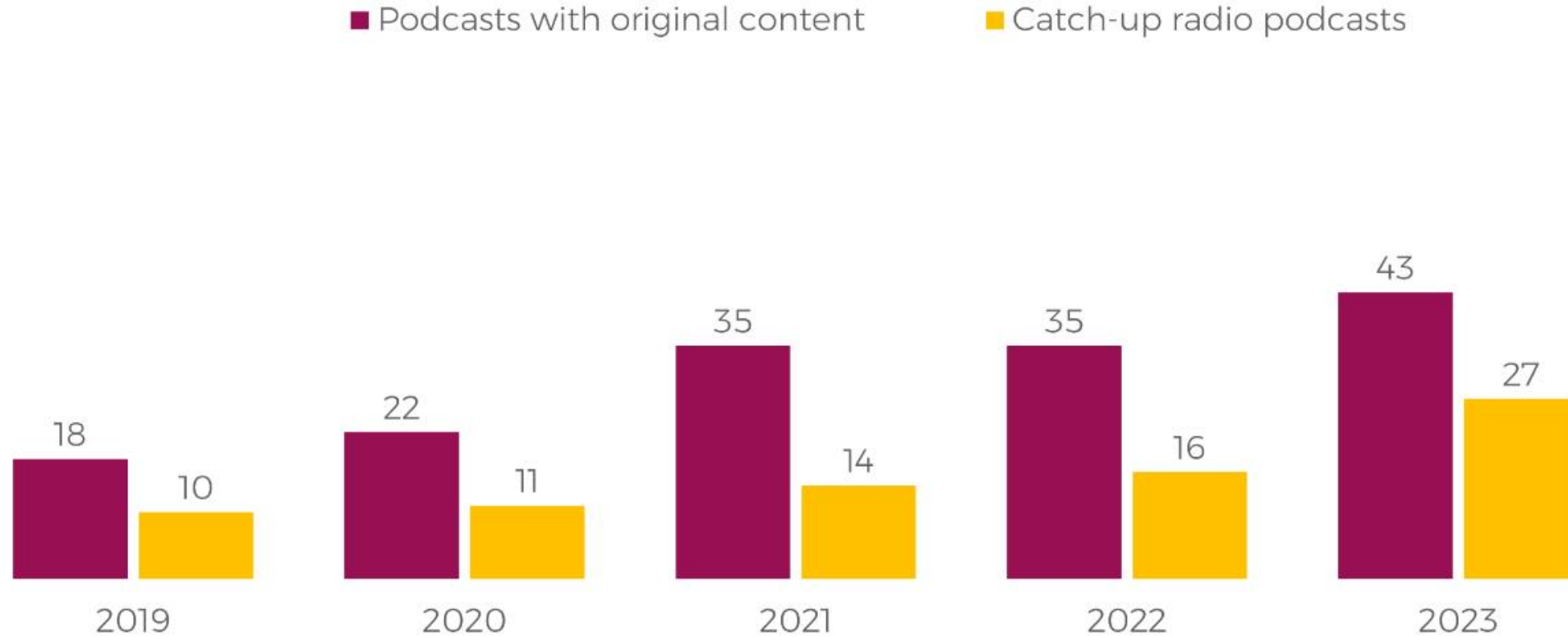
“How often do you listen to podcasts?”



Type of Podcast Listened to at Least Once a Month

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO TYPE OF PODCAST AT LEAST ONCE A MONTH



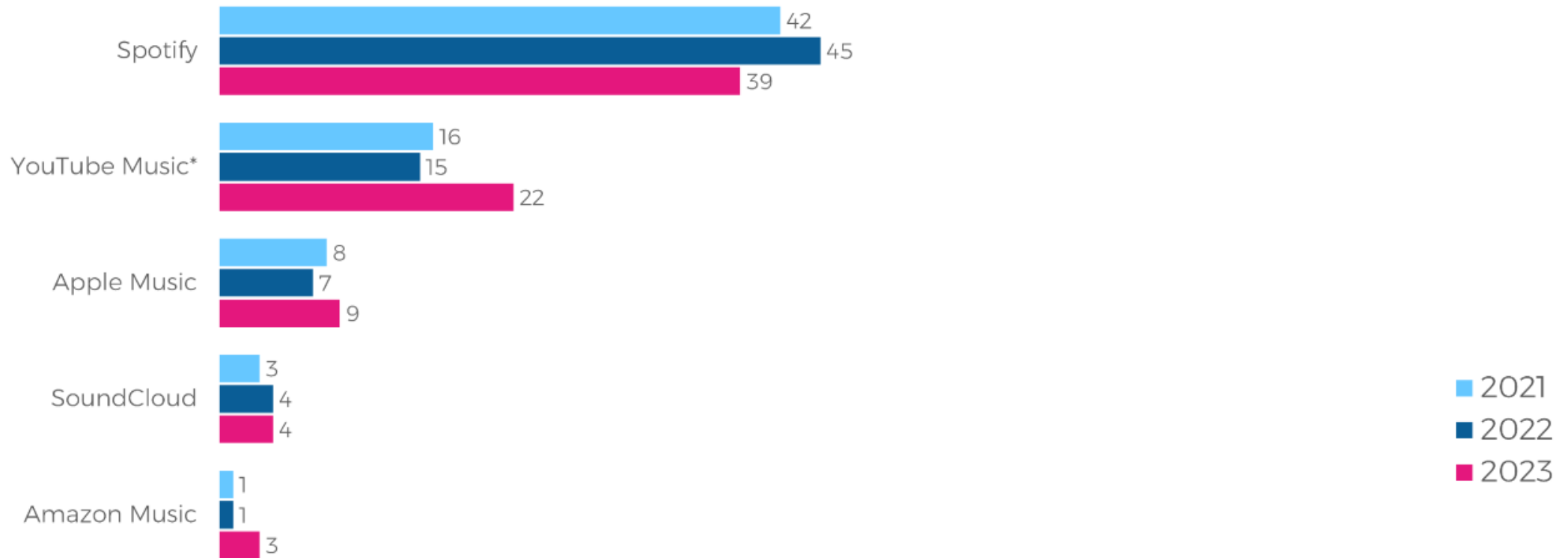
Online Audio Streaming Services

(Includes DAB+ radio)

Weekly Listening to Online Audio Streaming Services

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO ONLINE AUDIO STREAMING SERVICE IN LAST WEEK



*ASKED AS: "YOUTUBE MUSIC, THE STREAMING MUSIC SERVICE FROM YOUTUBE"

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Free vs. Paid Subscriptions to Spotify

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



3 in 10 weekly Spotify listeners can be reached by advertising on Spotify

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Weekly Listening to Ad-Supported Audio

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO AUDIO SOURCE IN THE LAST WEEK



Weekly Listening to Ad-Supported Audio

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO AUDIO SOURCE IN THE LAST WEEK



Weekly Listening to Ad-Supported Audio

TOTAL AUSTRALIAN POPULATION 12+

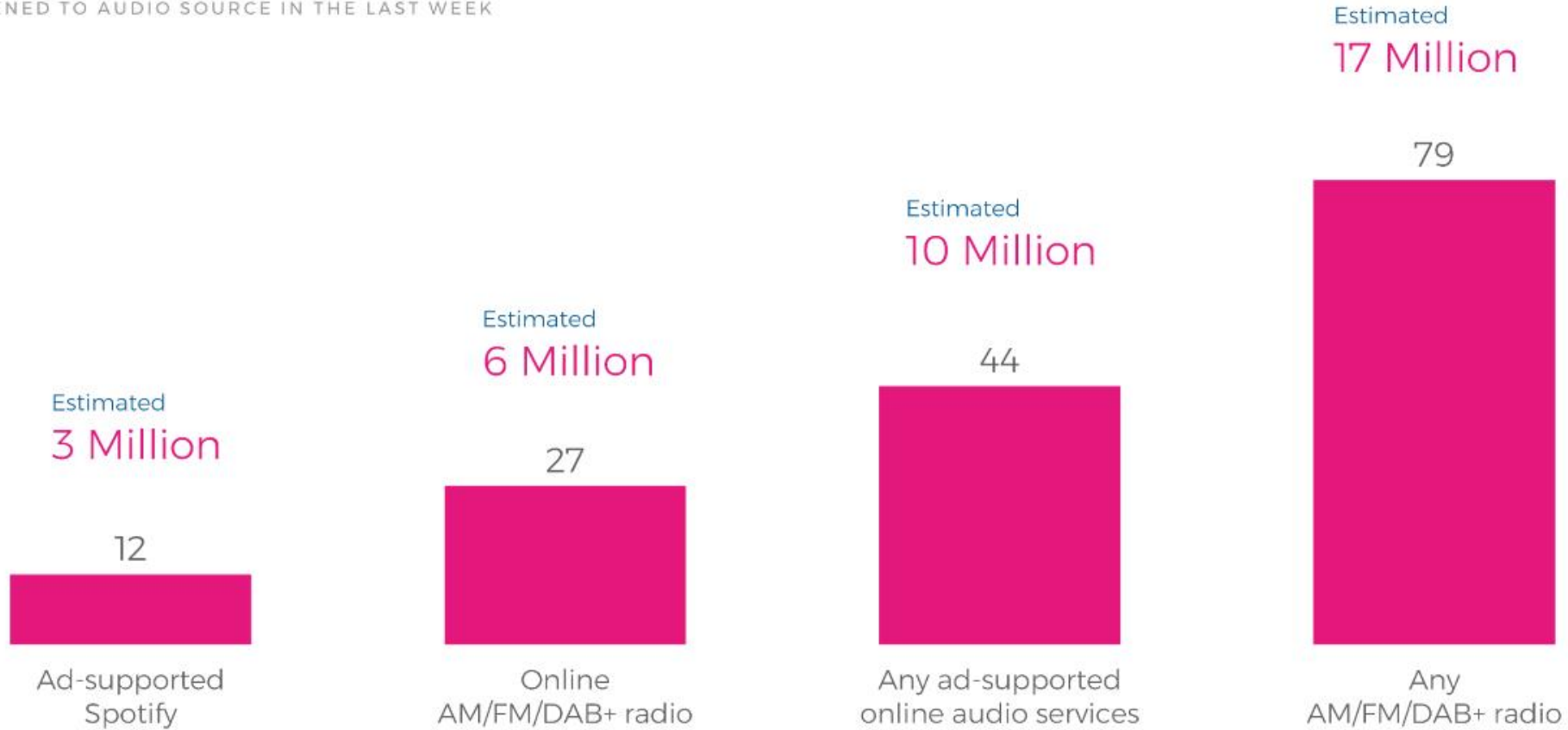
% LISTENED TO AUDIO SOURCE IN THE LAST WEEK



Weekly Listening to Ad-Supported Audio

TOTAL AUSTRALIAN POPULATION 12+

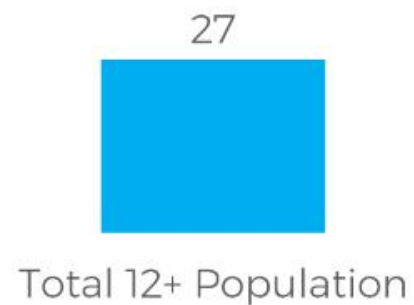
% LISTENED TO AUDIO SOURCE IN THE LAST WEEK



TikTok Weekly Usage

TOTAL AUSTRALIAN POPULATION 12+

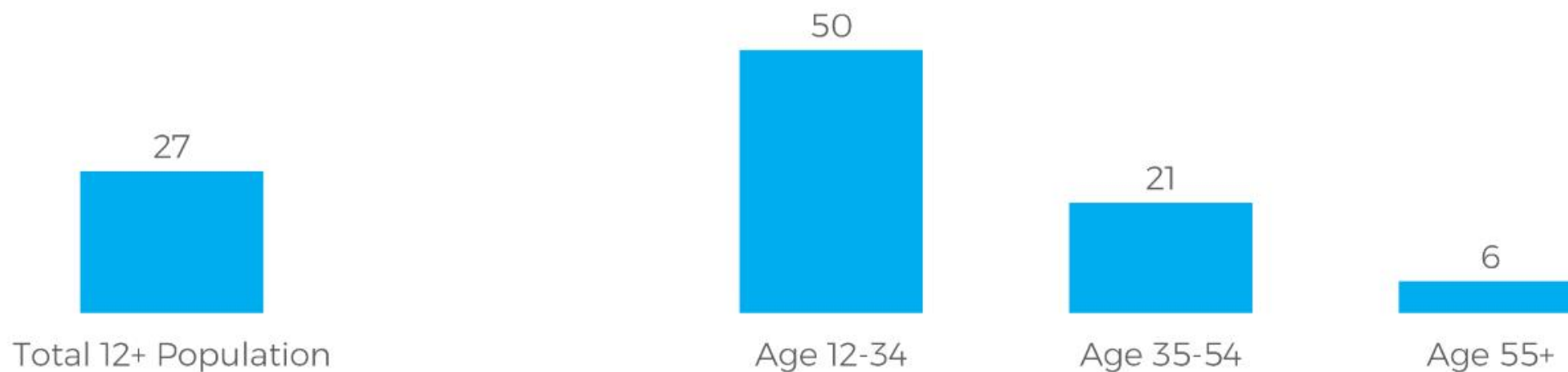
% USED TIKTOK IN THE LAST WEEK



TikTok Weekly Usage

TOTAL AUSTRALIAN POPULATION 12+

% USED TIKTOK IN THE LAST WEEK

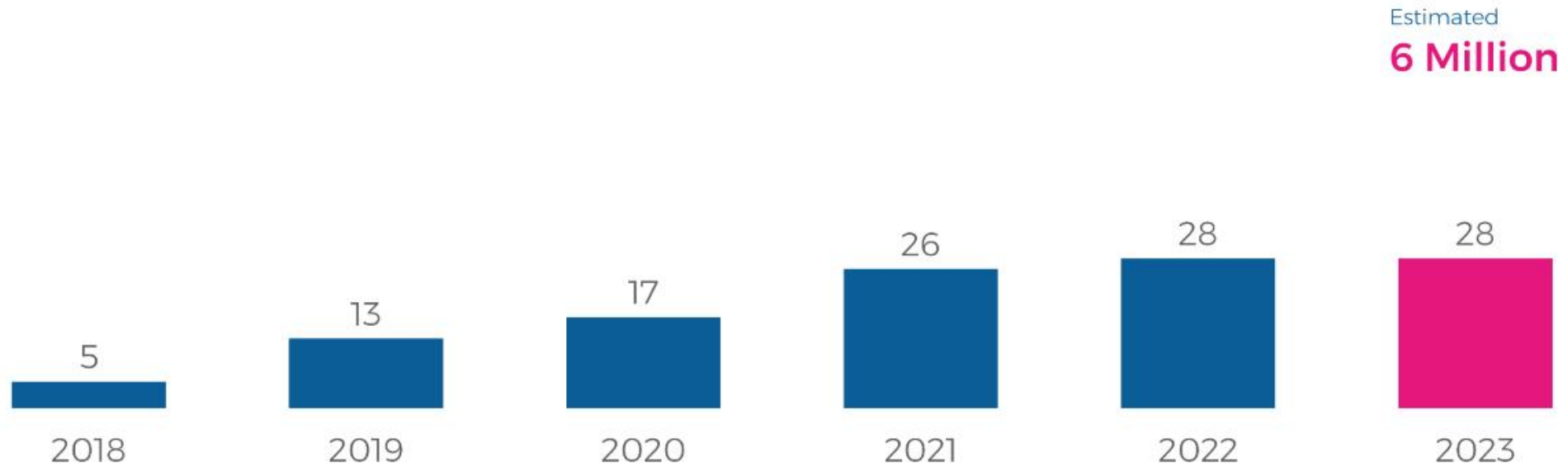


Smart Speakers

Smart Speaker Ownership

TOTAL AUSTRALIAN POPULATION 12+

% OWNING A SMART SPEAKER



Estimated
6 Million

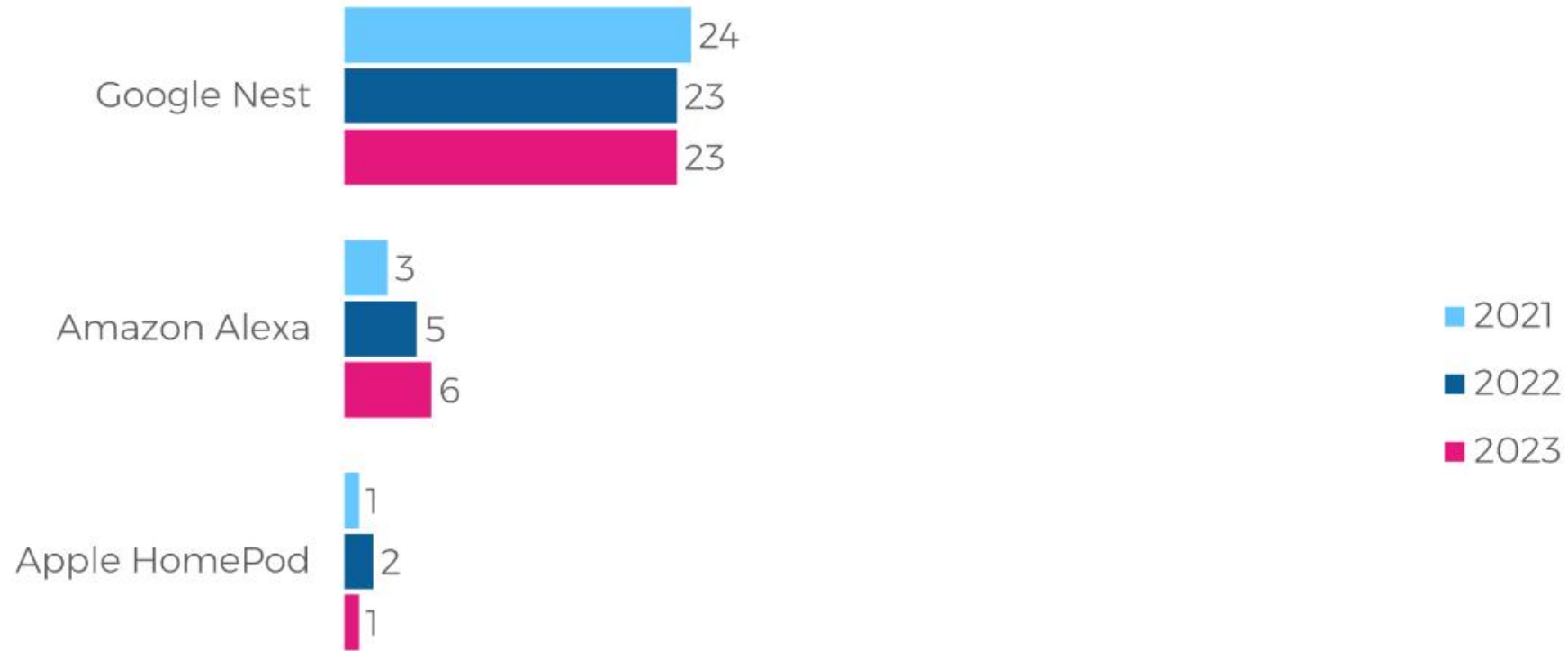
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Smart Speaker Ownership

TOTAL AUSTRALIAN POPULATION 12+

% OWNING SMART SPEAKER BRAND



Smart Speaker Ownership

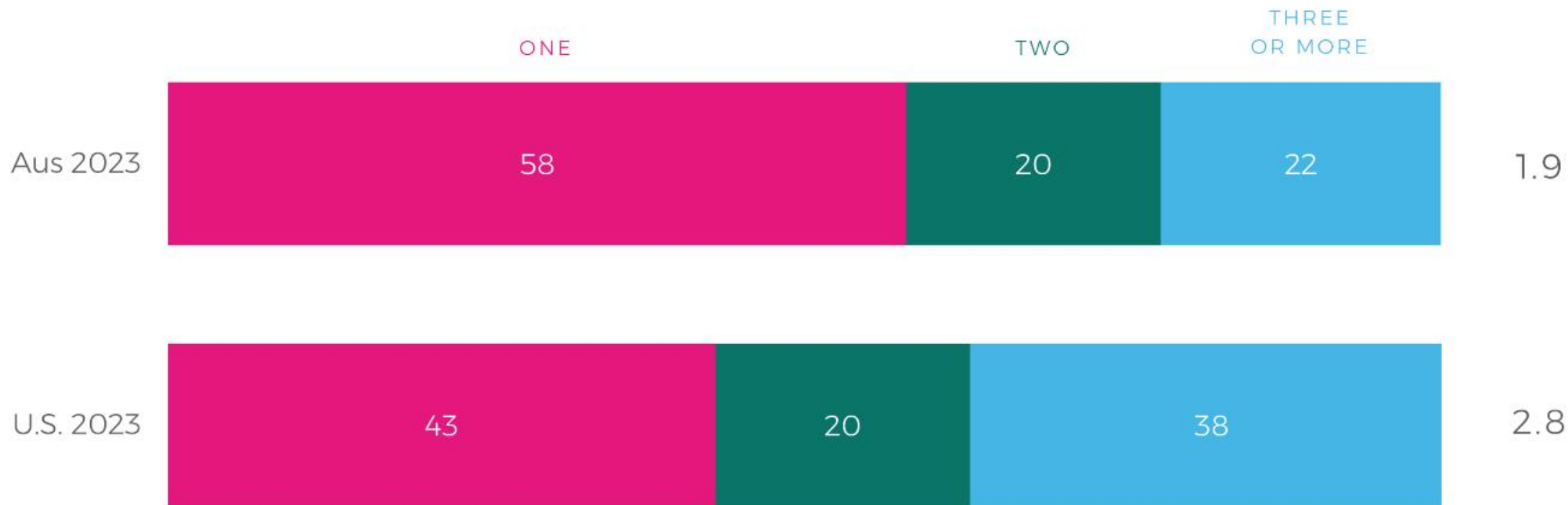
TOTAL POPULATIONS

% OWNING A SMART SPEAKER



Number of Smart Speakers in Household

BASE: AGE 12+ WHO OWN A SMART SPEAKER



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



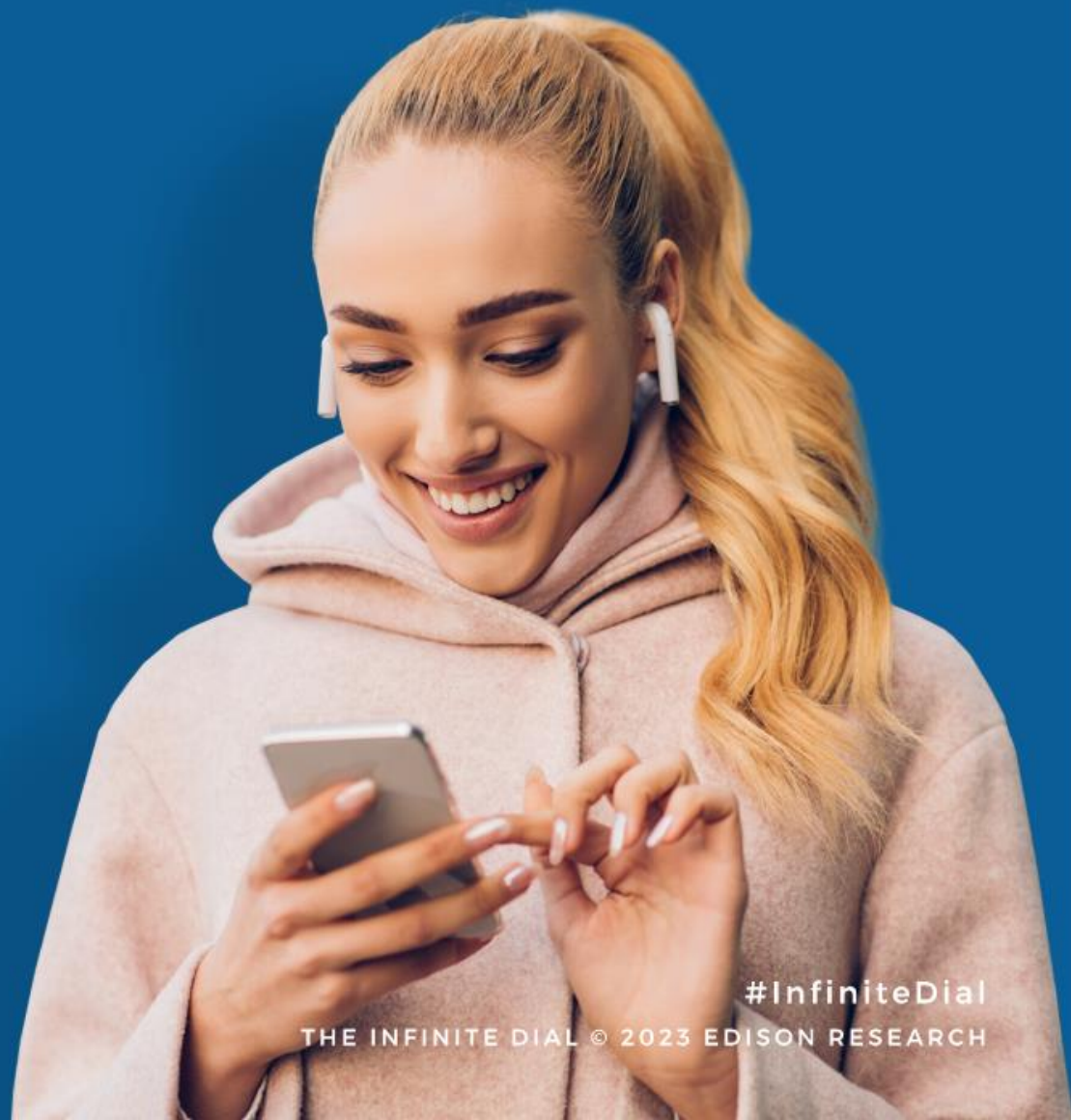
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Observations

Podcast listening has reached new highs in Australia, with 43% of the 12+ population listening in the last month



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