



THE INFINITE DIAL

AUSTRALIA 2018

#INFINITEDIAL





Study Overview

- 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
- Infinite Dial Australia, now in its second year, explores the penetration of online digital audio and social media in Australia and the online platforms and technologies that Australians are using
- This study is designed to allow for direct comparisons between the Australian and U.S. markets – plus now also with comparisons to “Infinite Dial Canada”



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Study Methodology

- In the first quarter of 2018, Edison Research conducted a national telephone survey of 1,009 Australians ages 12 and older
- Data weighted to national 12+ population figures



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RADIO & RADIO SIMULCAST





Listening to AM/FM Radio in Australia in the Last Week

Base: Total Population 12+



**AM/FM Radio includes both "over-the-air" and online. 2017 figures do not include DAB+ listening.*



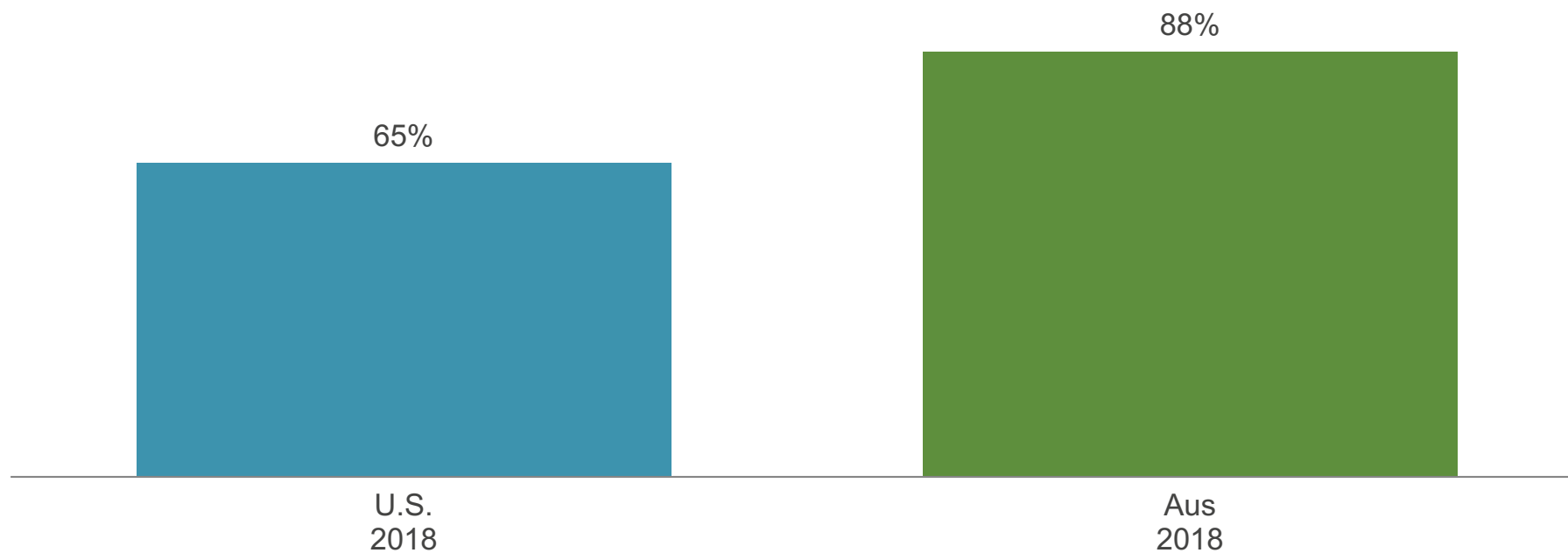
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Listening to AM/FM Radio in the Last Week

Base: Total Population 12+



**AM/FM Radio includes both "over-the-air" and online.*



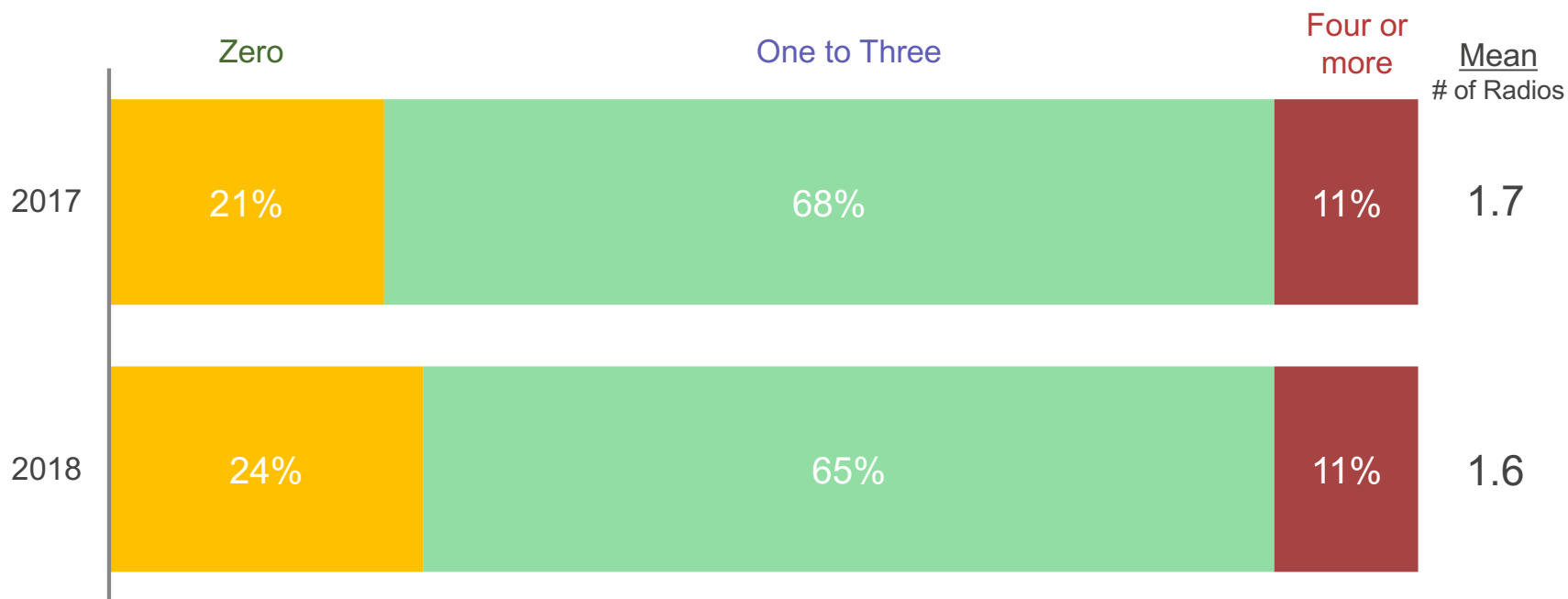
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Number of Radios Owned in Homes in Australia

Base: Total Population 12+



*2017 figures do not include DAB+ radios

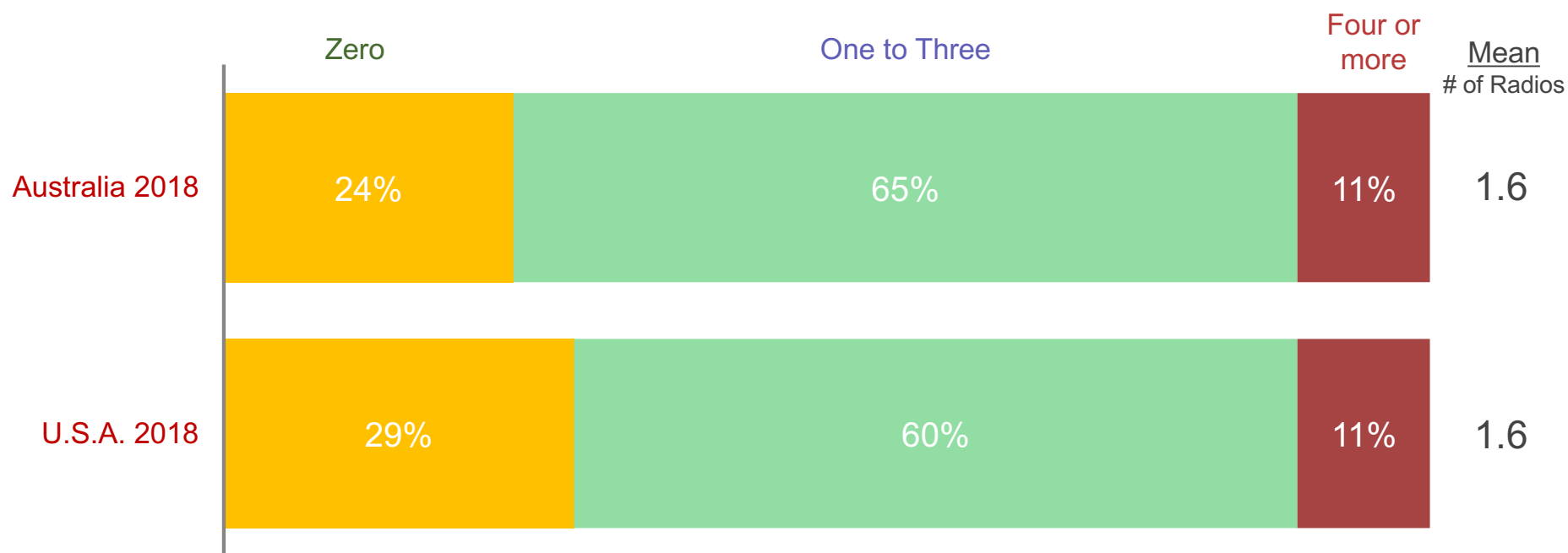


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Number of Radios Owned in Home

Base: Total Population 12+

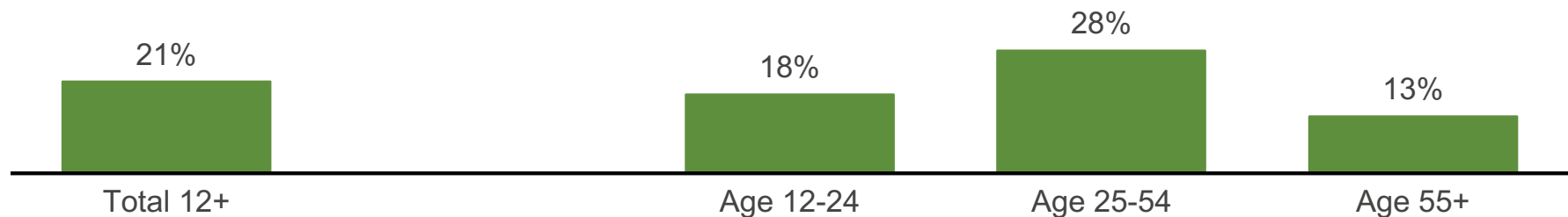


*2017 figures do not include DAB+ radios



Radio Listening on Other Devices in Australia

“Do you ever use a mobile phone, computer, or TV to listen to radio while at home?”



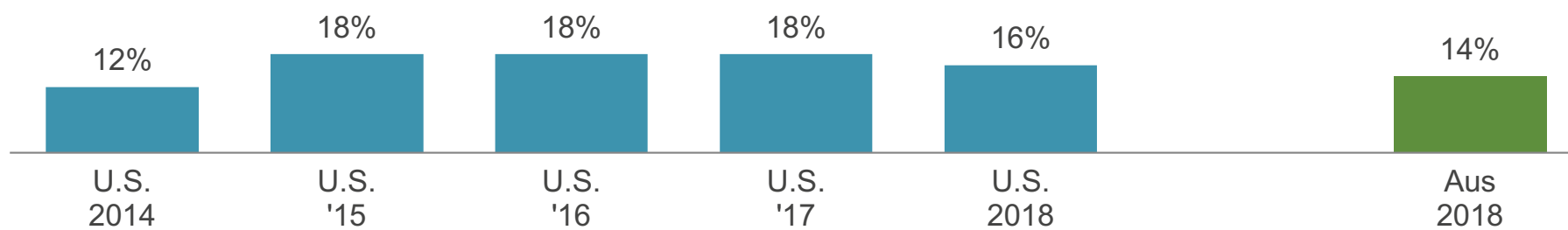
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Online Listening to AM/FM Radio in the Last Month

Base: Total Population 12+



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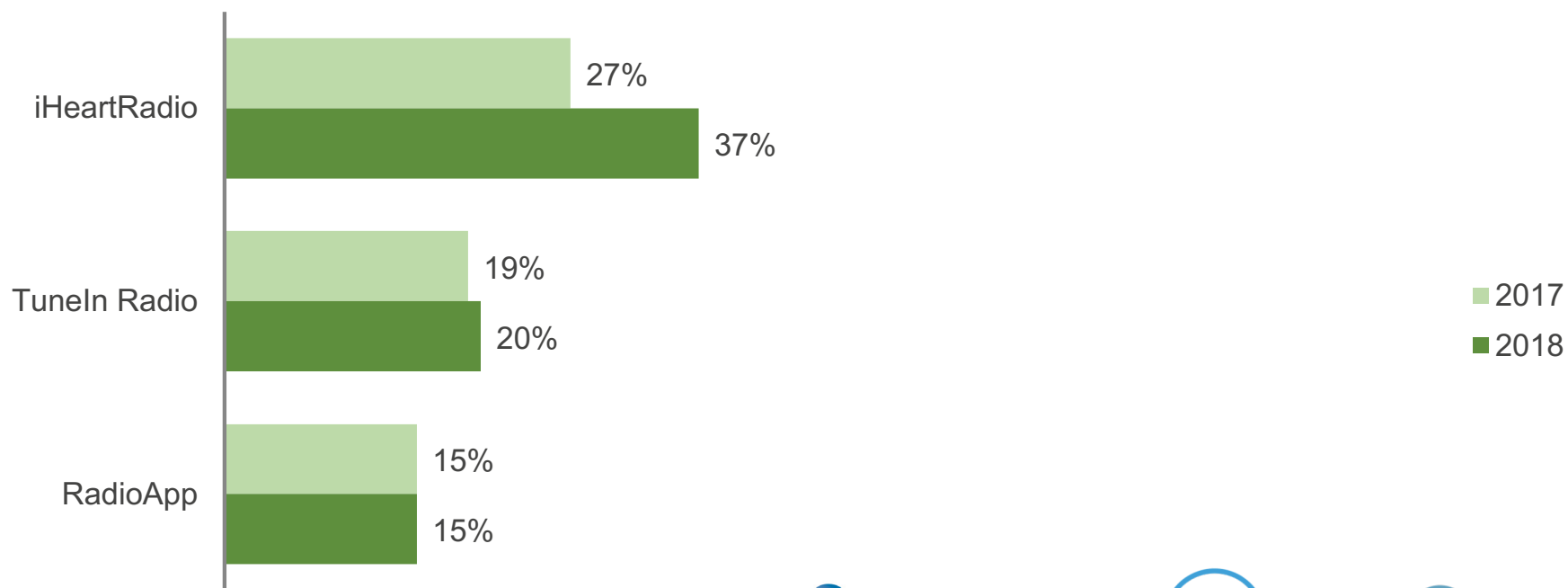
AUDIO AGGREGATORS





Audio Aggregator Brand Awareness in Australia

Base: Total Population 12+

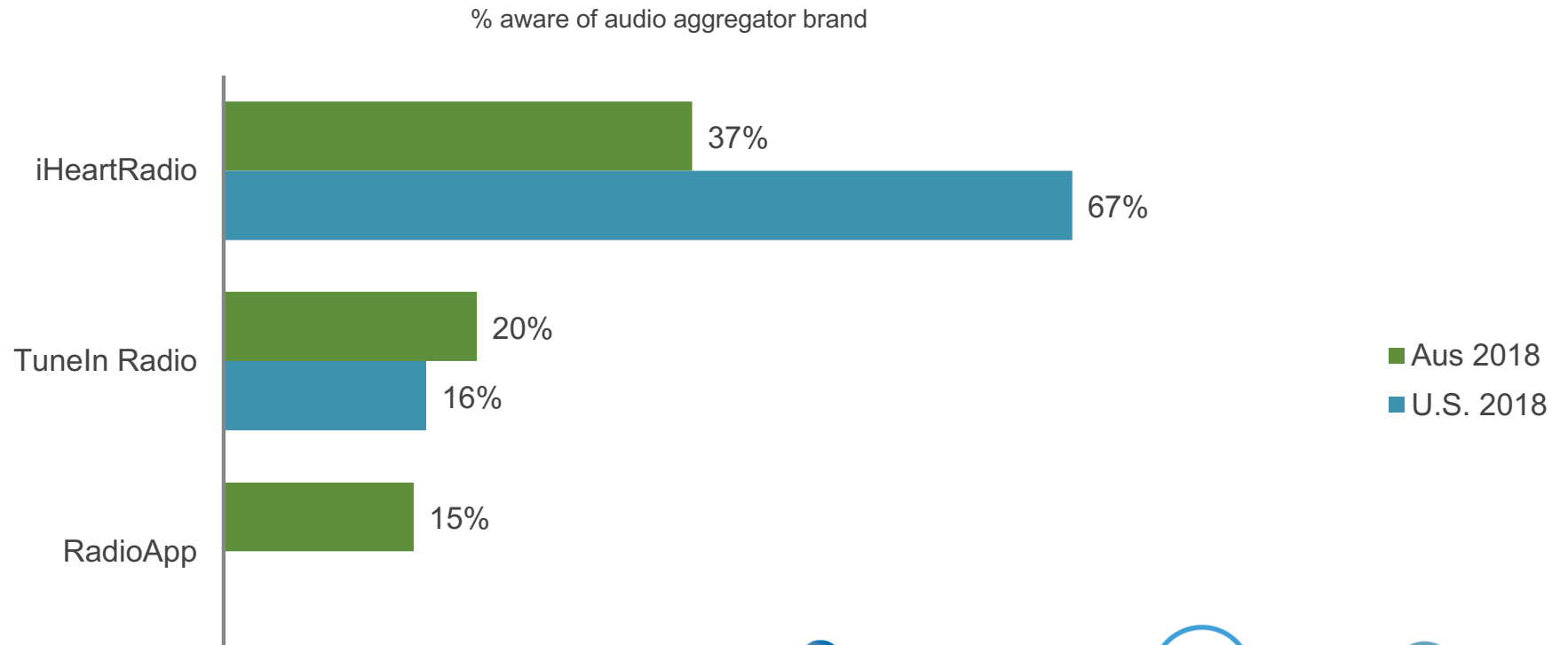


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Audio Aggregator Brand Awareness

Base: Total Population 12+





Audio Aggregators: Monthly Listening in Australia

Base: Total Population 12+



Sponsored by:





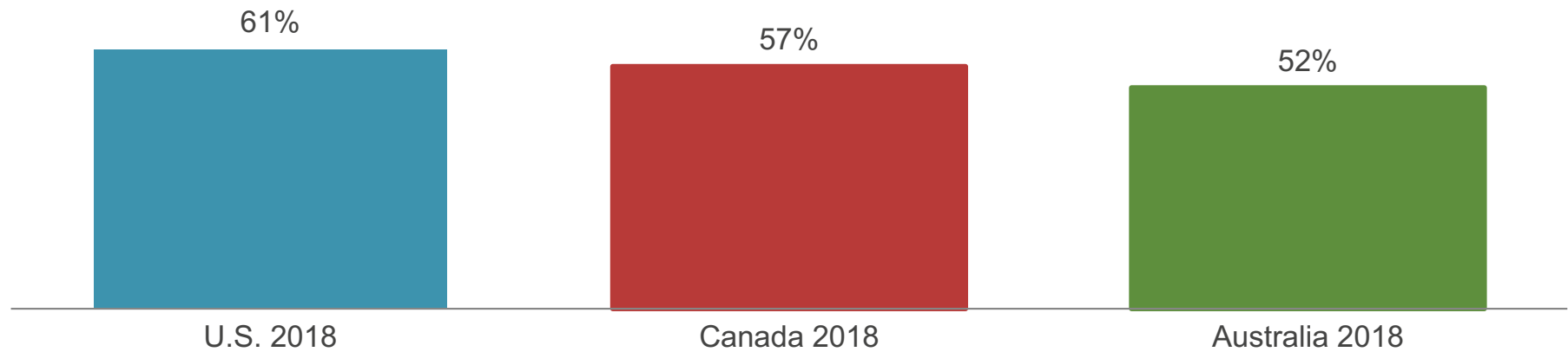
ONLINE AUDIO STREAMING SERVICES





Monthly Online Audio Listening

Base: Total Population 18+



% listening to Online Audio in last month



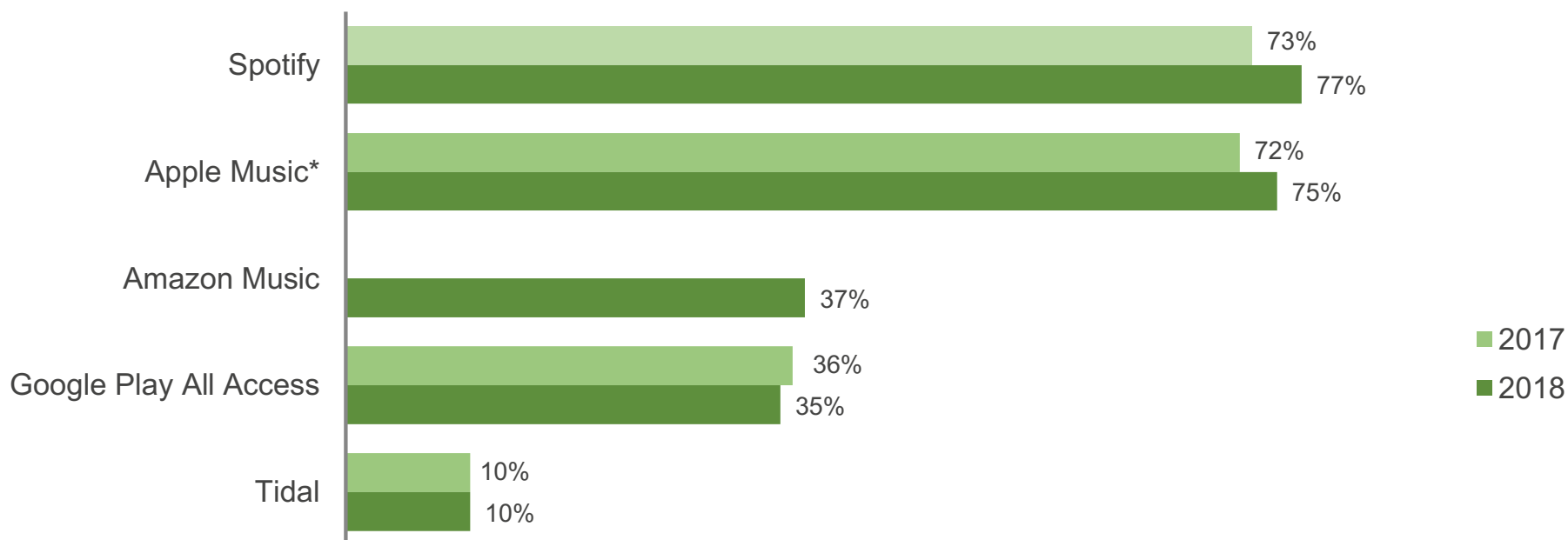
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Online Audio = Listening to AM/FM radio stations online and/or listening to streamed audio content available only on the Internet





Awareness of Online Audio Streaming Services in Australia

Base: Total Population 12+



*Asked as "Apple Music, the paid music subscription from Apple"



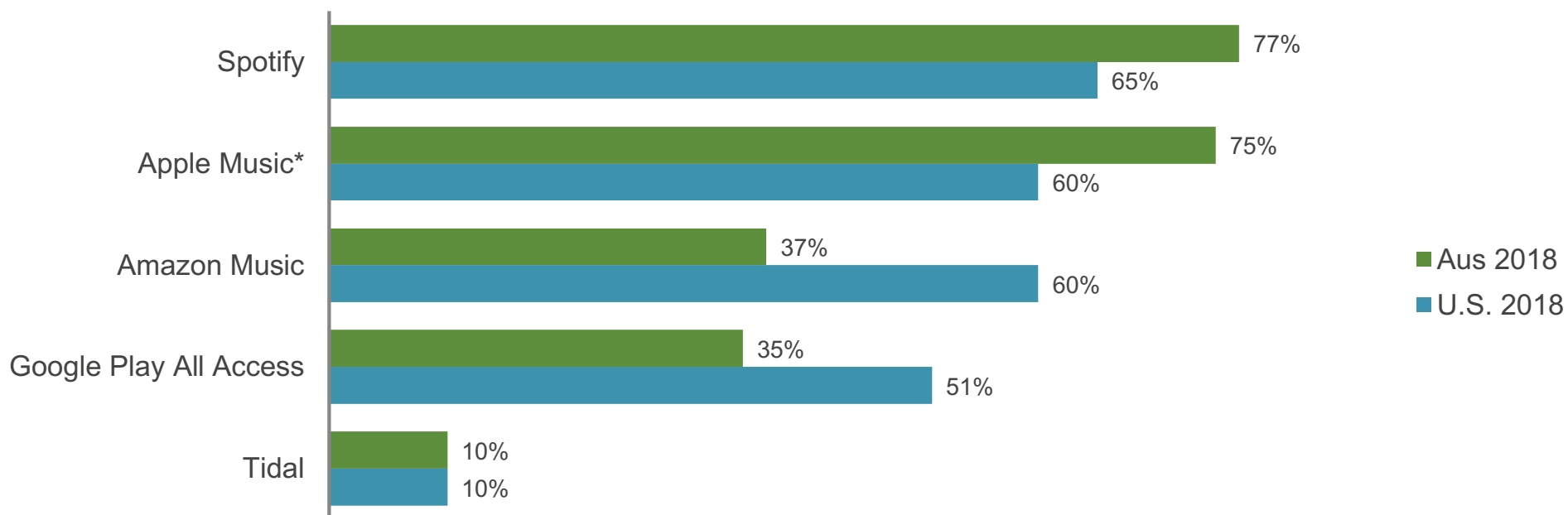
Sponsored by:





Awareness of Online Audio Streaming Services

Base: Total Population 12+



*Asked as "Apple Music, the paid music subscription from Apple"



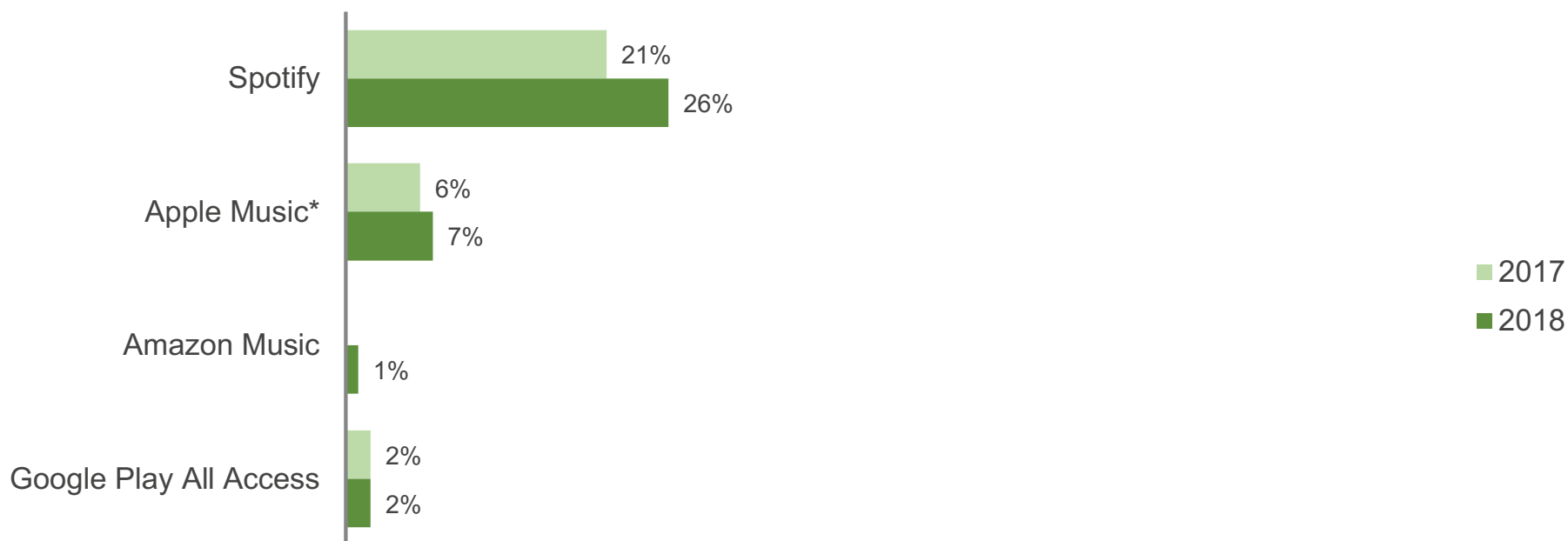
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Listening to Online Audio Streaming Services in Australia in the Last Week

Base: Total Population 12+



*Asked as "Apple Music, the paid music subscription from Apple"



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Weekly YouTube Music Usage in Australia

Base: Total Population 12+



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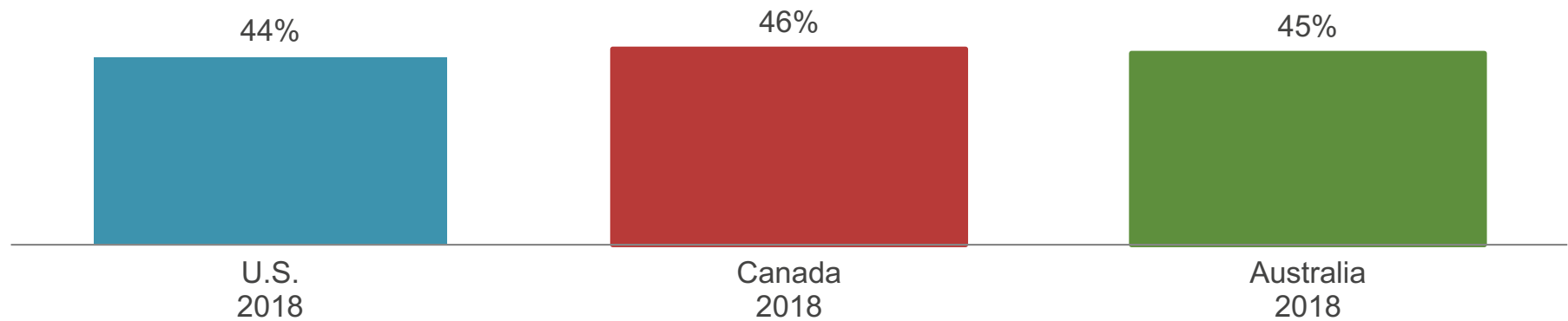




Weekly YouTube Music Usage

“Have you used YouTube to watch music videos or listen to music in the last week?”

Base: Total Population 18+



% used YouTube for music in last week

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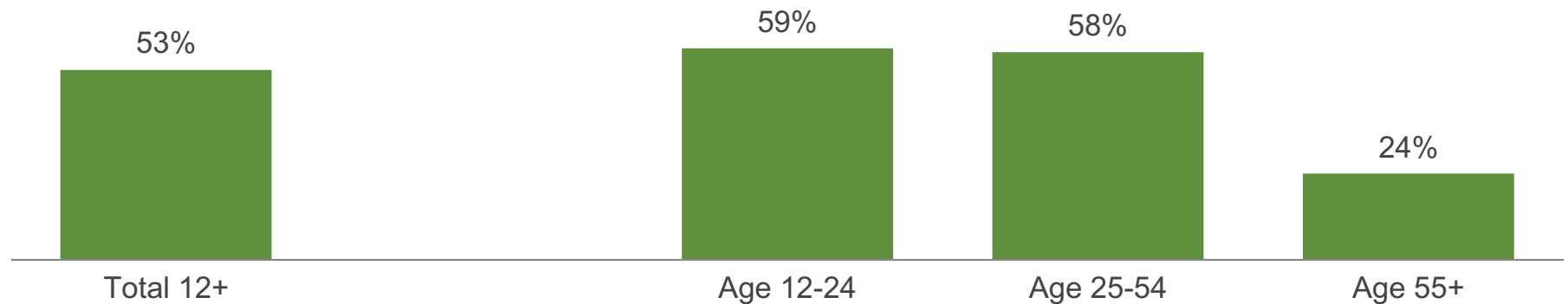




Mobile Audio Streaming in Australia

“Do you use your mobile data allowance to listen to audio via your mobile?”

Base: Own mobile phone and have ever listened to AM/FM/DAB+ Radio or Internet-only audio



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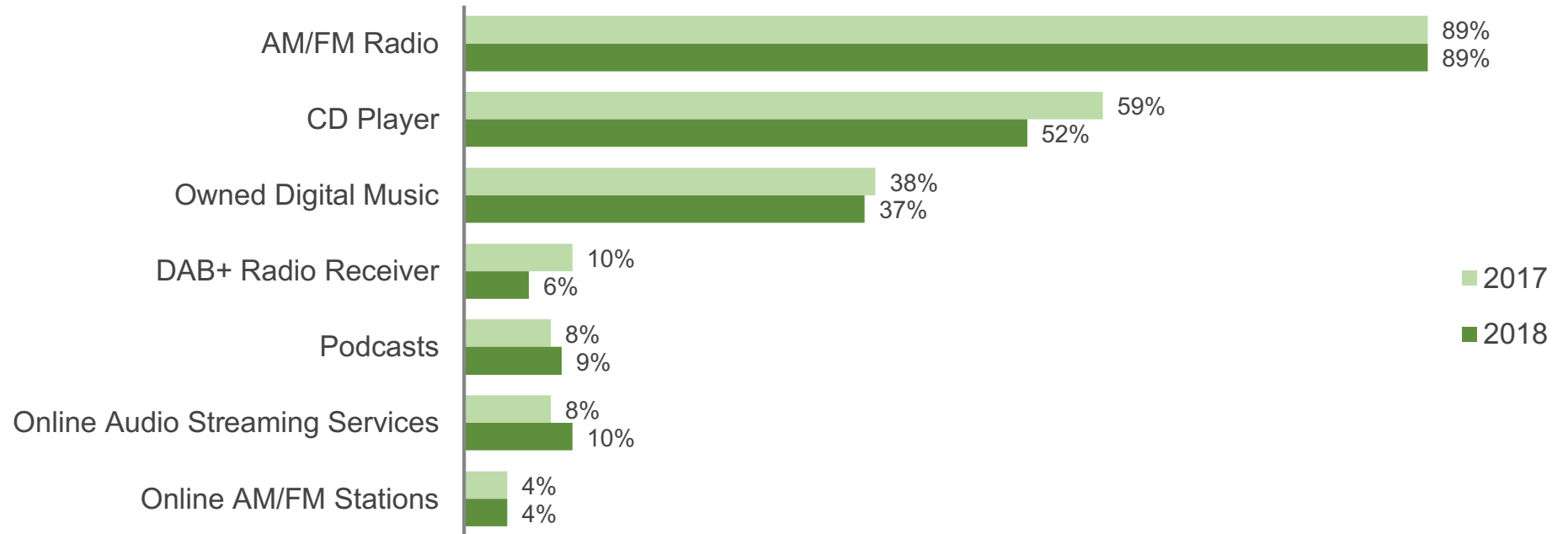


IN-CAR AUDIO



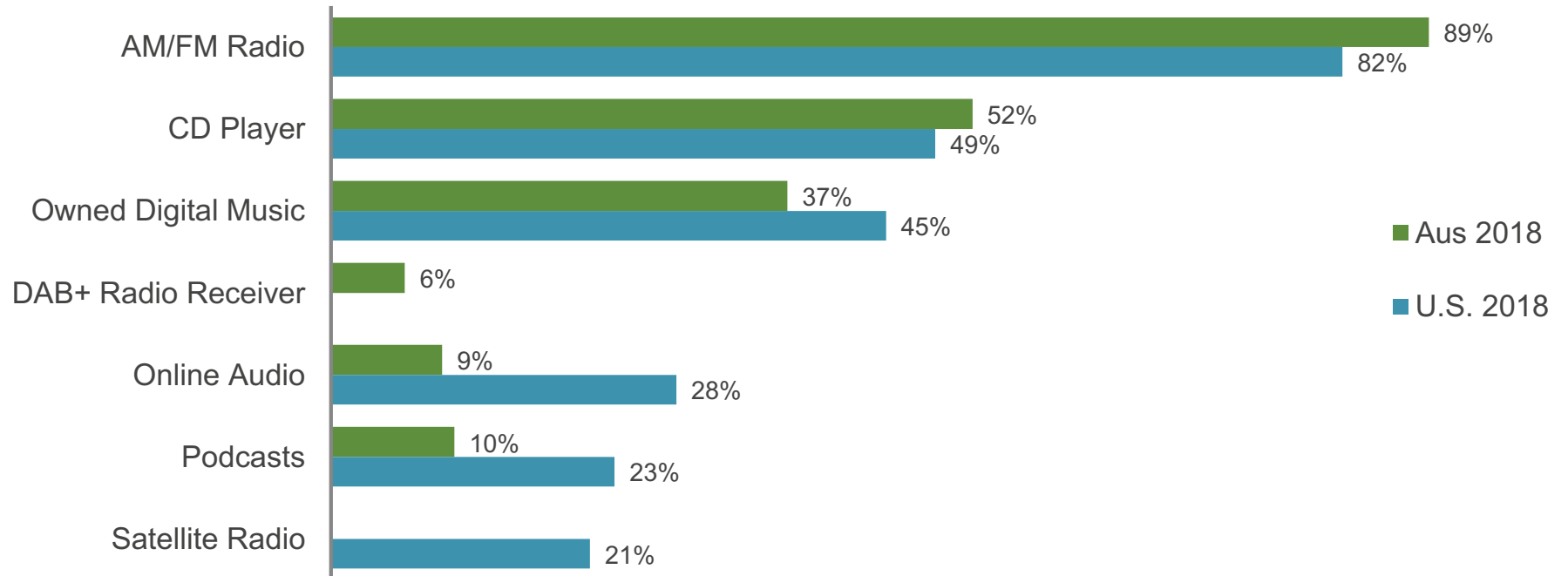
Audio Sources Used in Car in Australia

Base: Age 18+ and has driven/ridden in car in last month (89% of total)



Audio Sources Used in Car

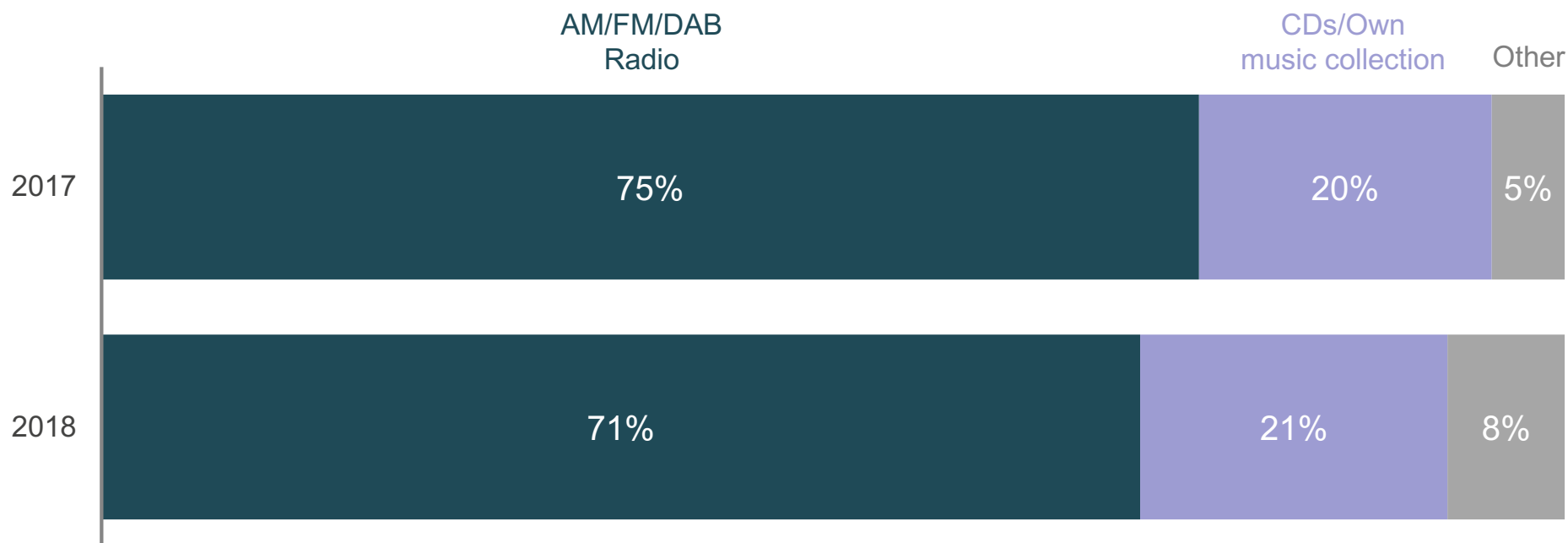
Base: Age 18+ and has driven/ridden in car in last month (89% of total)





Audio Source Used Most Often in Car in Australia

Base: Age 18+ and has driven/ridden in car in last month, and use any audio source in car



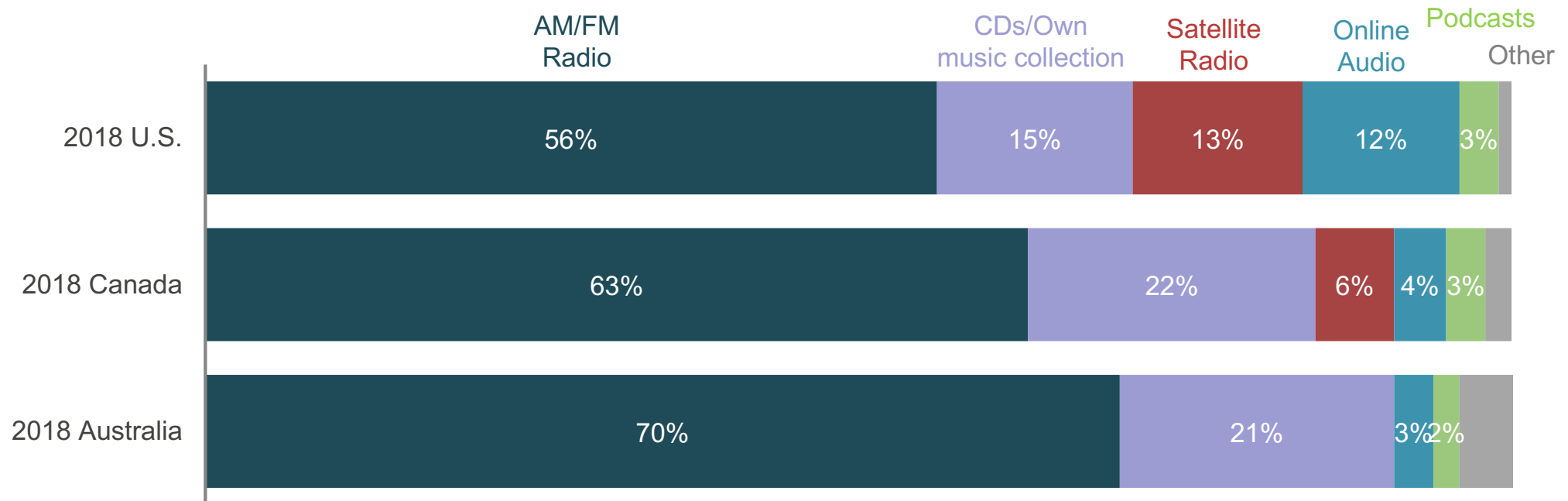
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Audio Source Used Most Often in Car

Base: Age 18+, has driven/ridden in car in last month, and use any audio source in car



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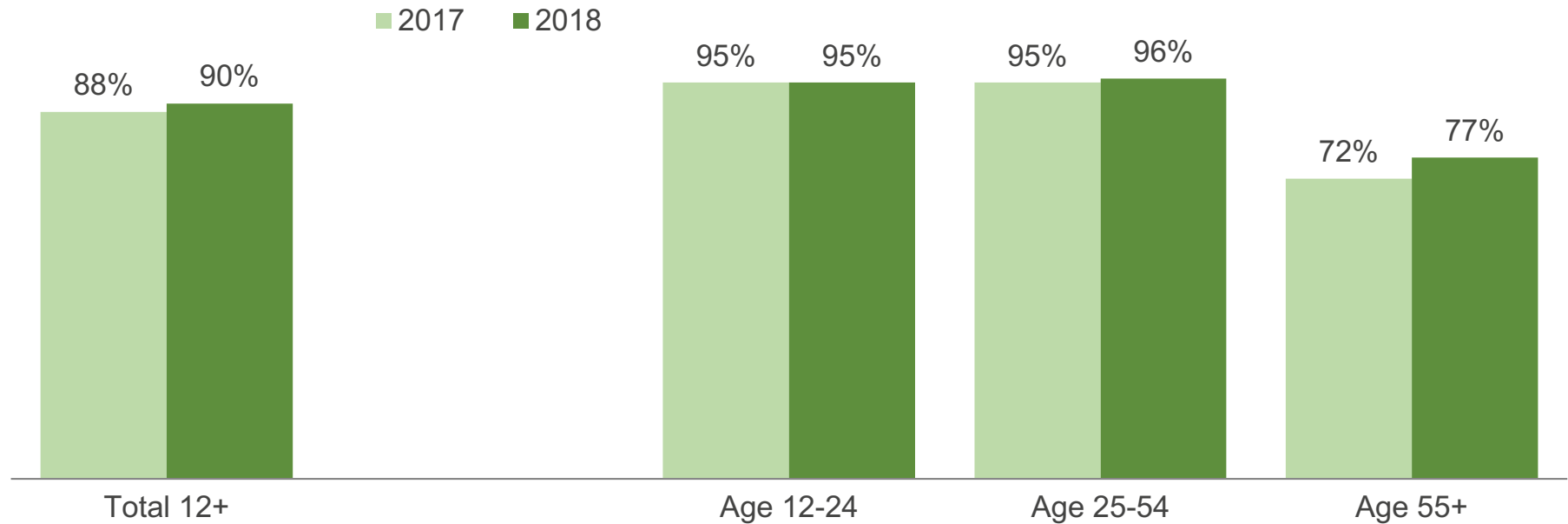




DEVICES & TECHNOLOGIES



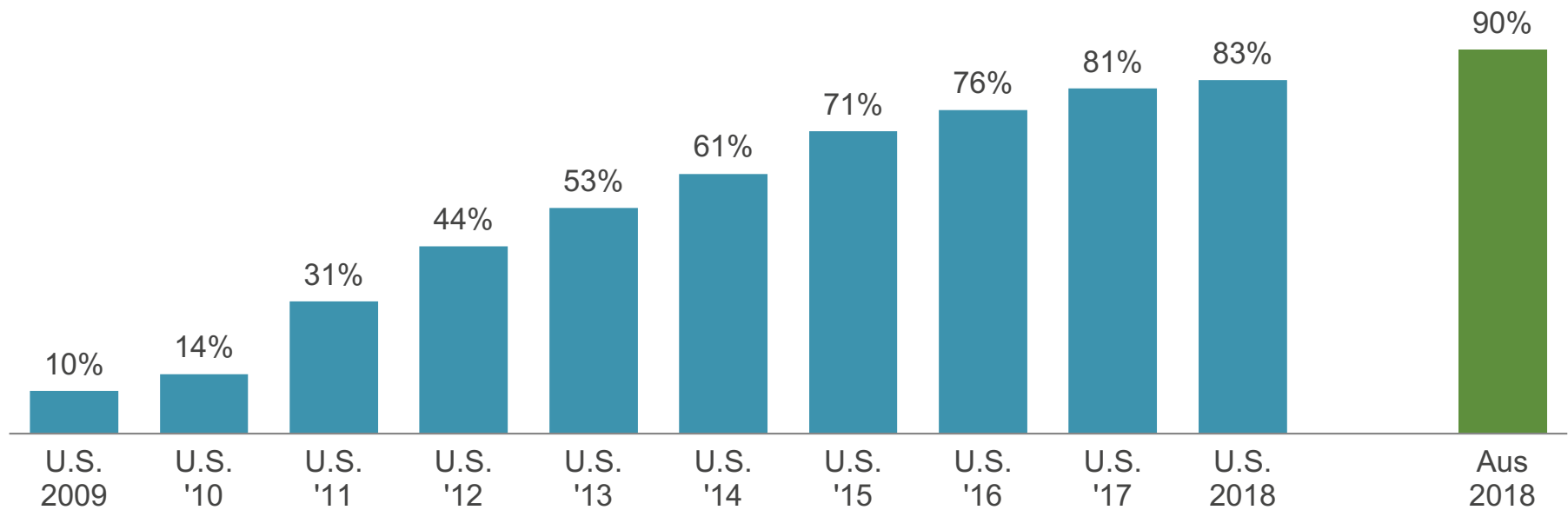
Smartphone Ownership in Australia





Smartphone Ownership

Base: Total Population 12+



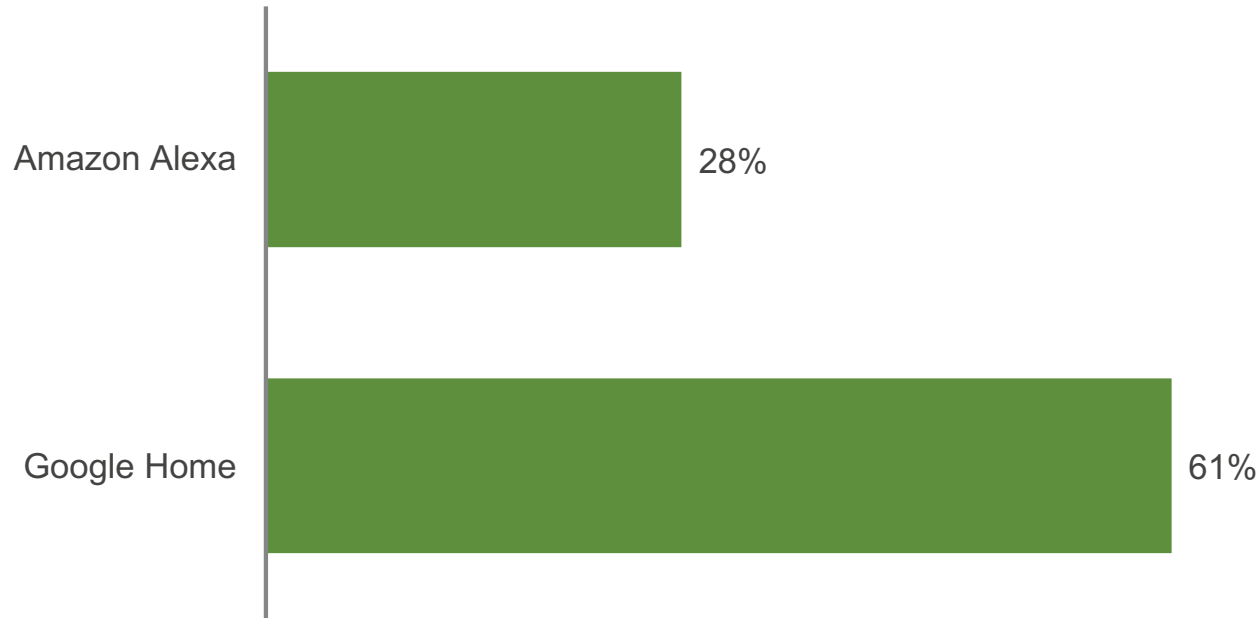
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Smart Speaker Awareness in Australia

Base: Total Population 12+

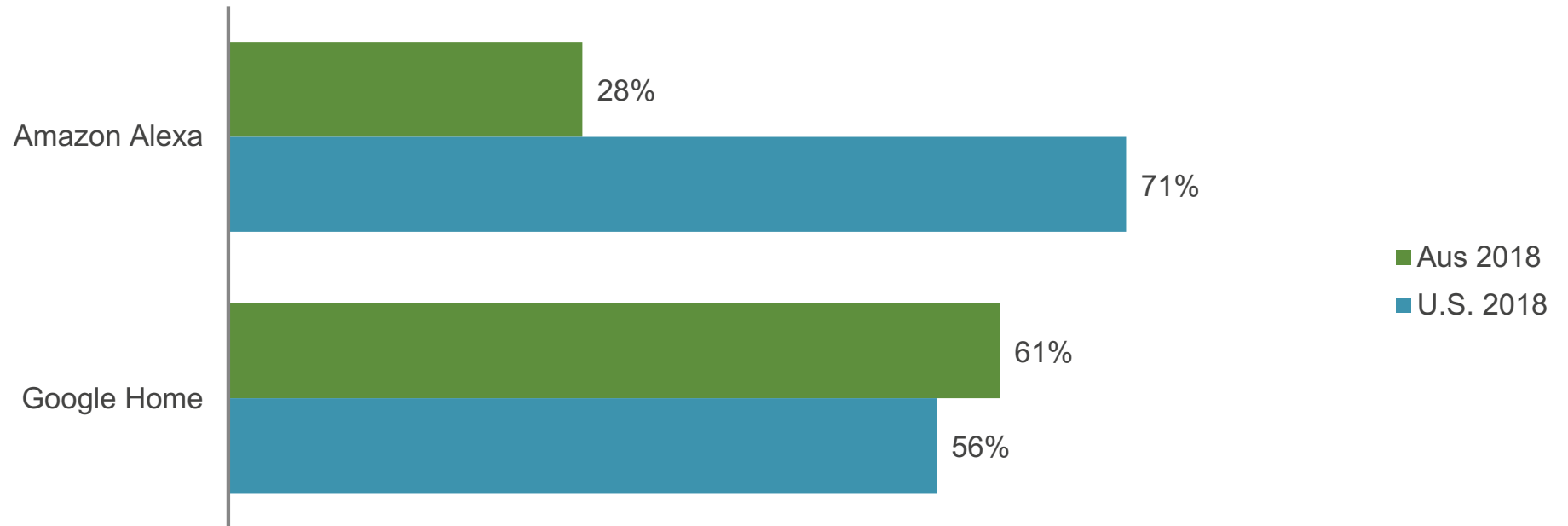


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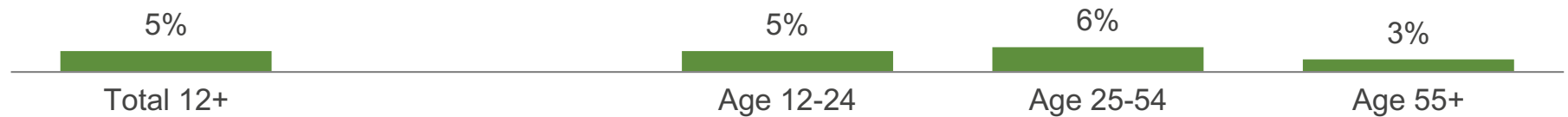
Smart Speaker Awareness

Base: Total Population 12+





Smart Speaker Ownership in Australia



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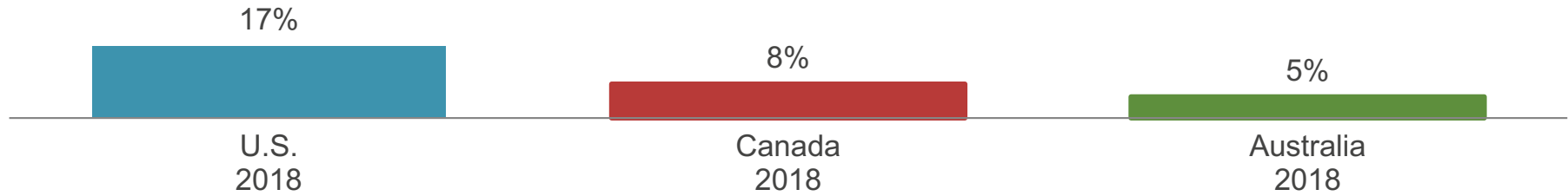




Smart Speaker Ownership

Base: Total Population 18+

% owning a Smart Speaker



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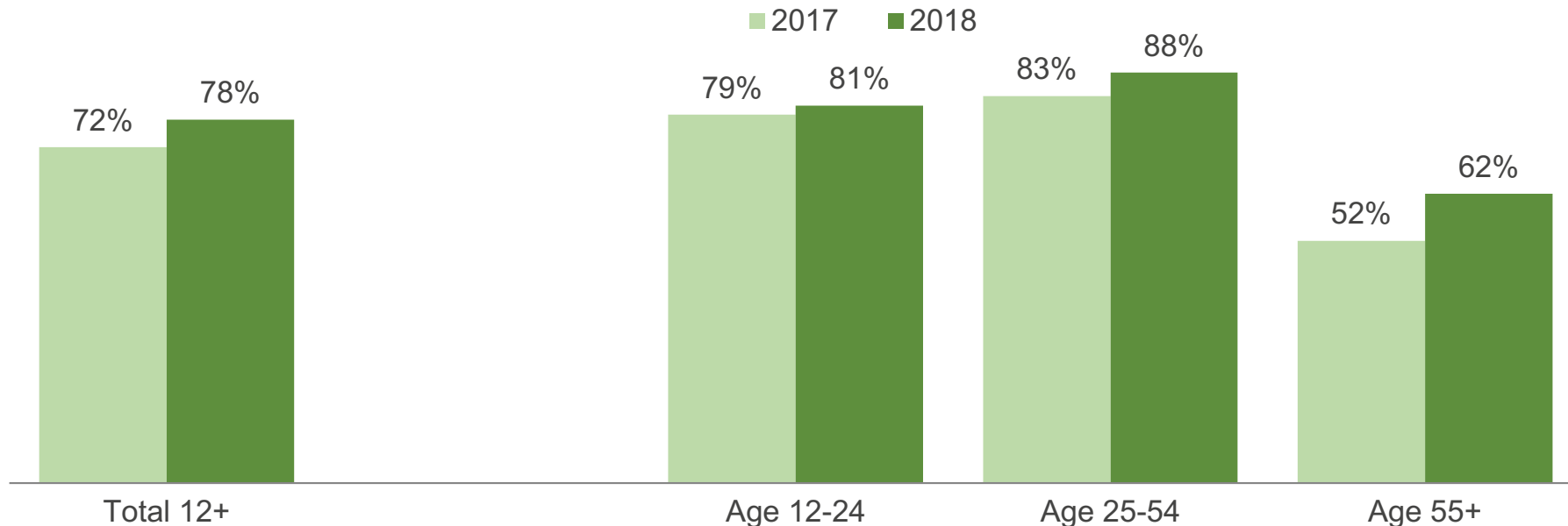


PODCASTING





Familiar with the term “Podcasting” in Australia



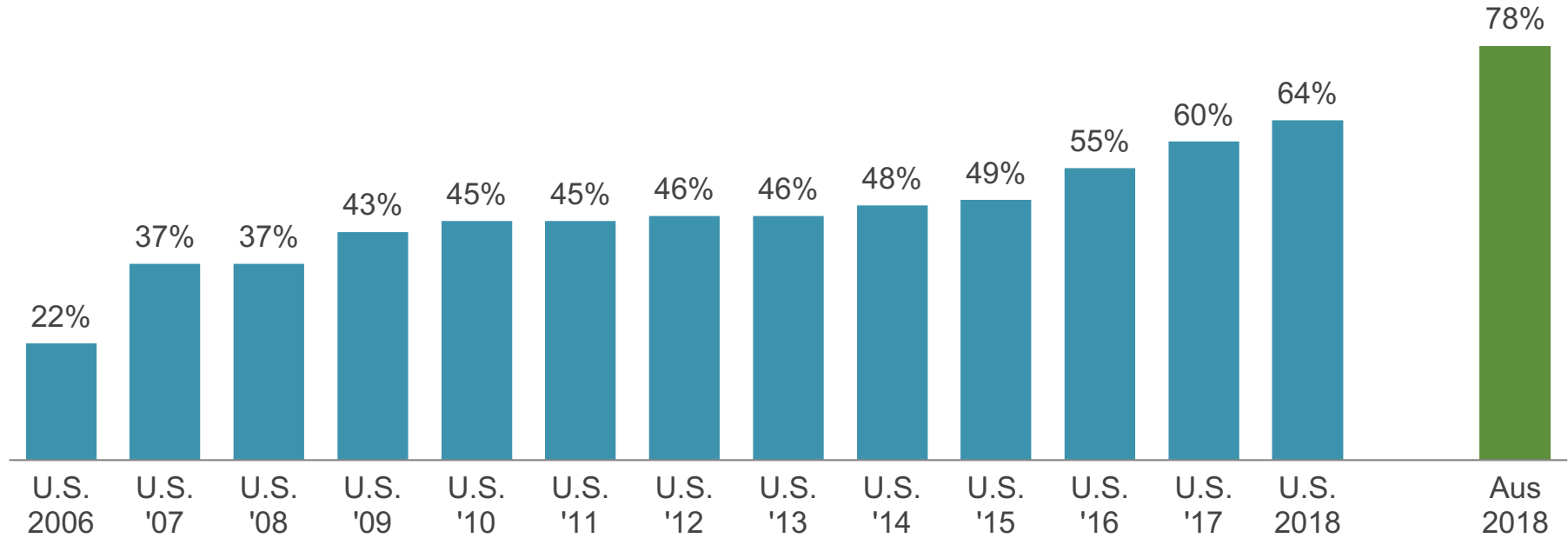
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Familiar with the term “Podcasting”

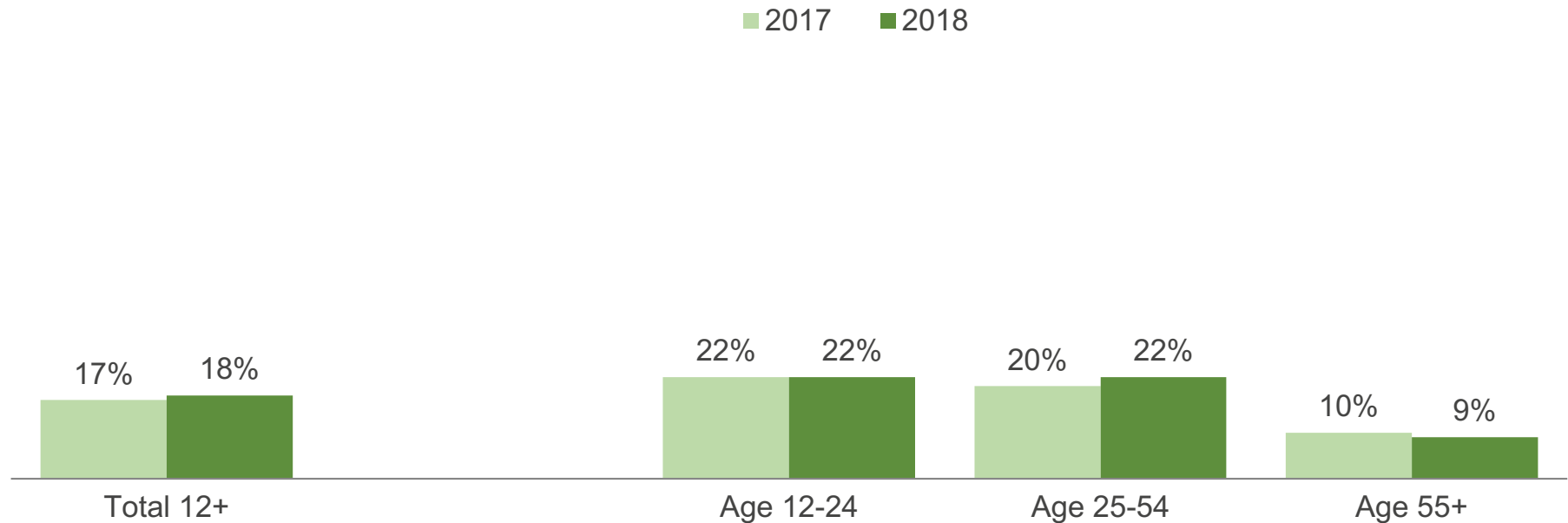
Base: Total Population 12+



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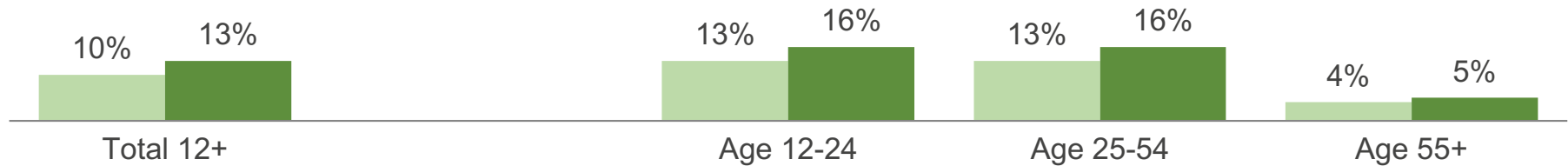
Monthly Podcast Listening in Australia





Weekly Podcast Listening in Australia

■ 2017 ■ 2018



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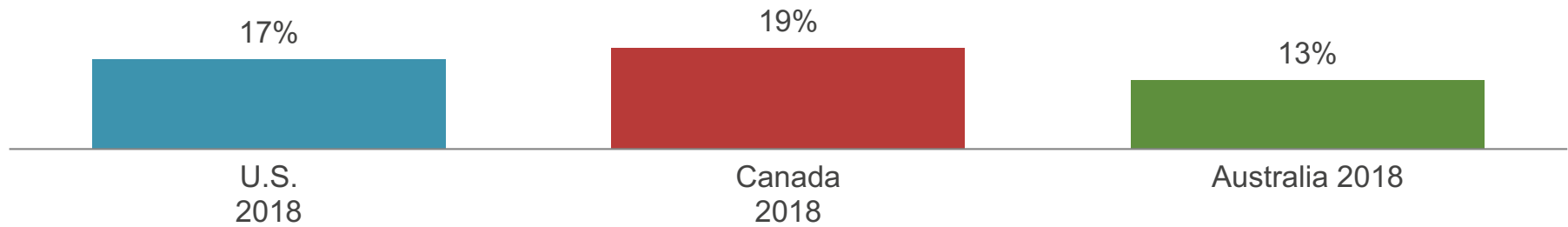




Weekly Podcast Listening

Base: Total Population 18+

% listened to a podcast in the last week



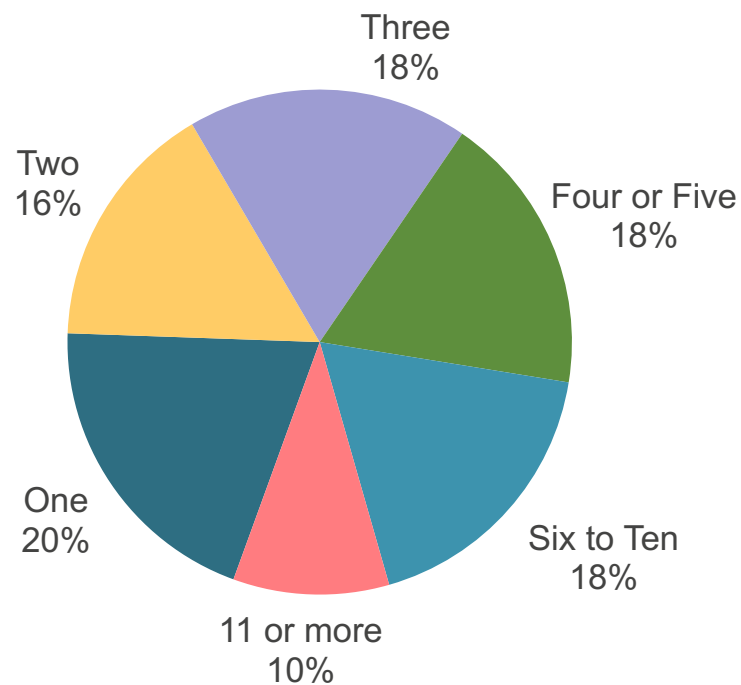
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Number of Podcasts Listened to in Last Week in Australia

Base: Weekly Podcast Listeners



Average of FIVE podcasts listened in last week



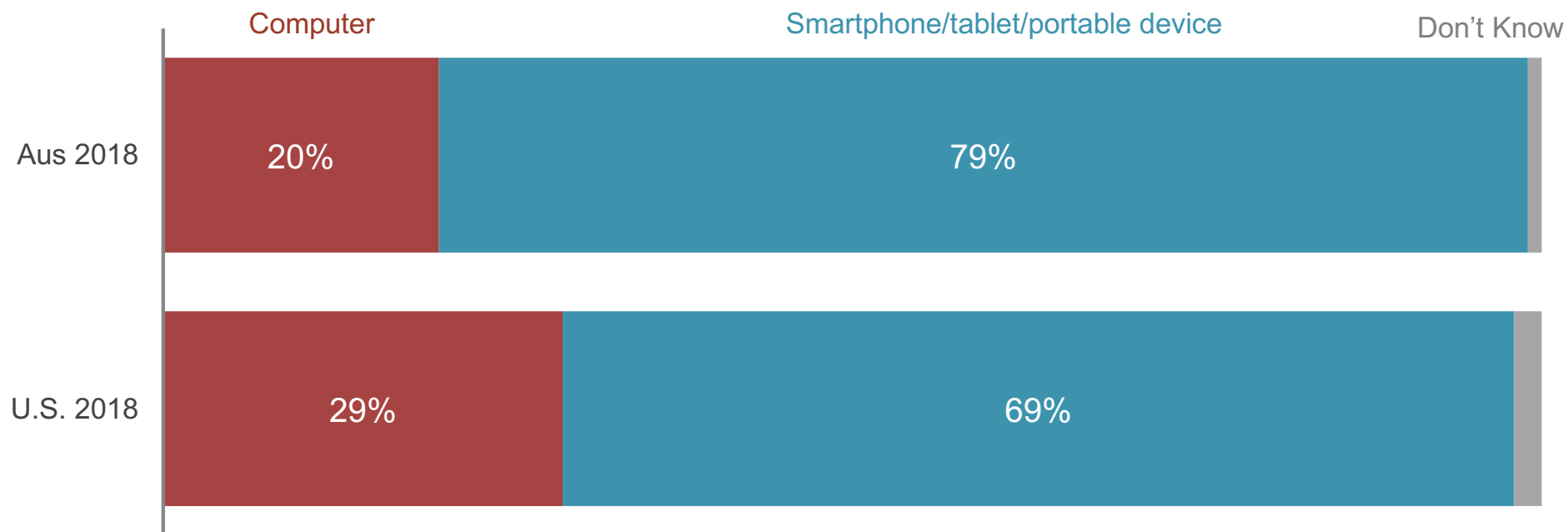
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Device Used Most Often to Listen to Podcasts

Base: Ever Listened to a Podcast



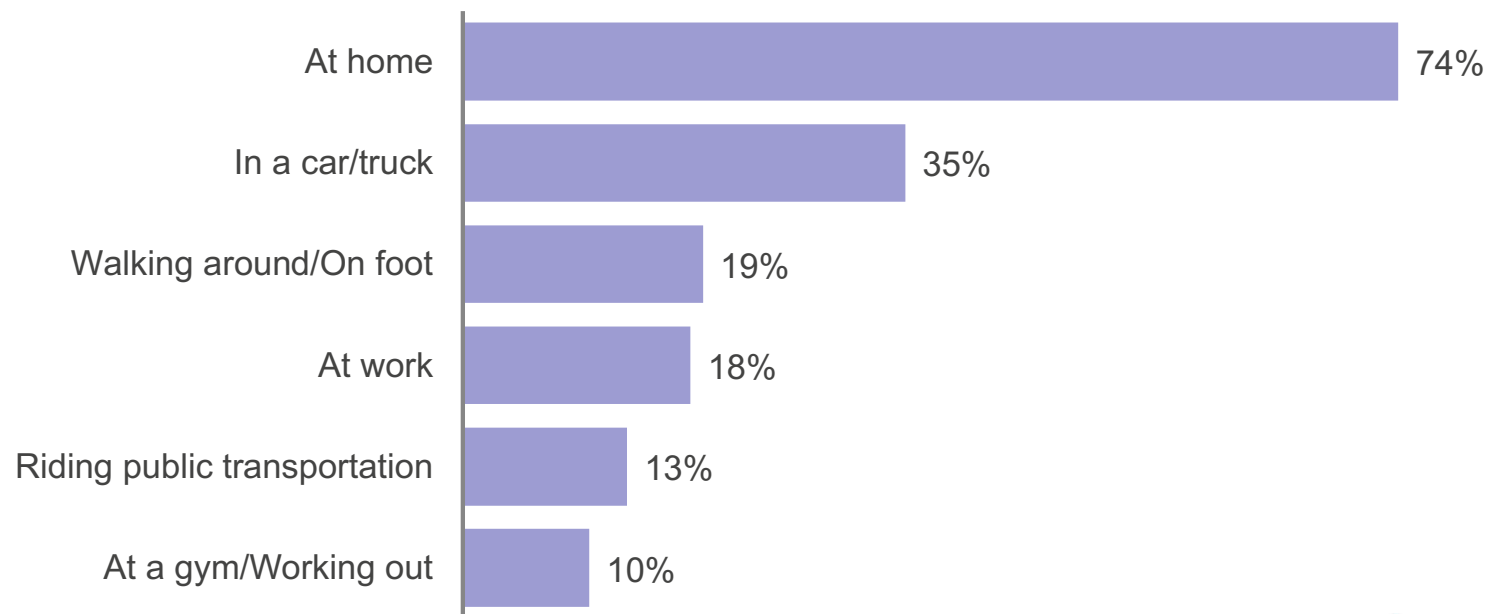
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Podcast Listening Locations in Australia

Base: Ever Listened to a Podcast



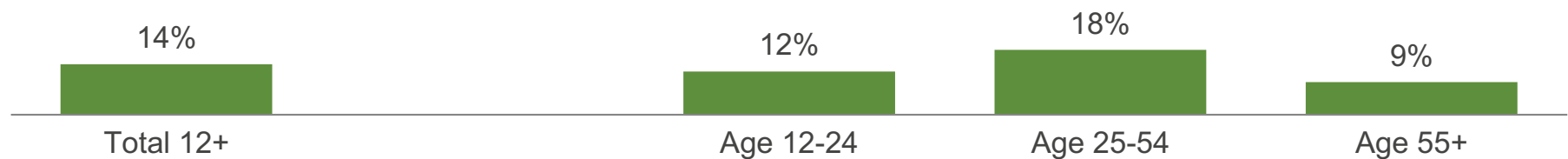
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Radio Podcast Listening

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



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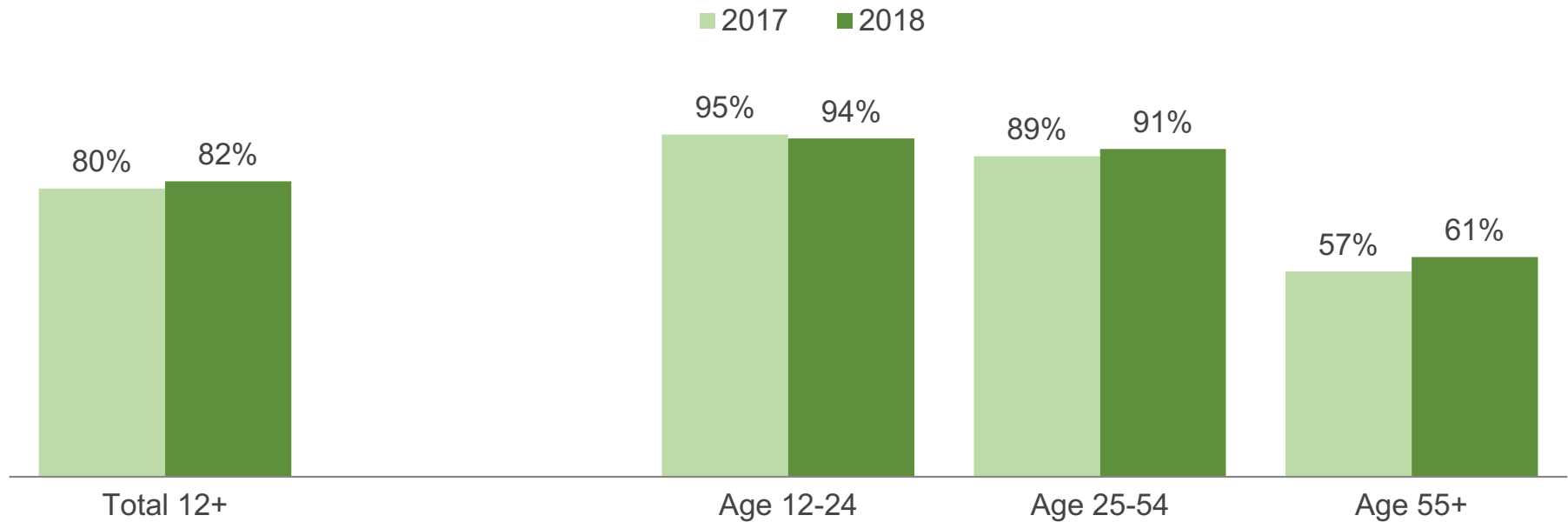




SOCIAL MEDIA & ON-DEMAND VIDEO



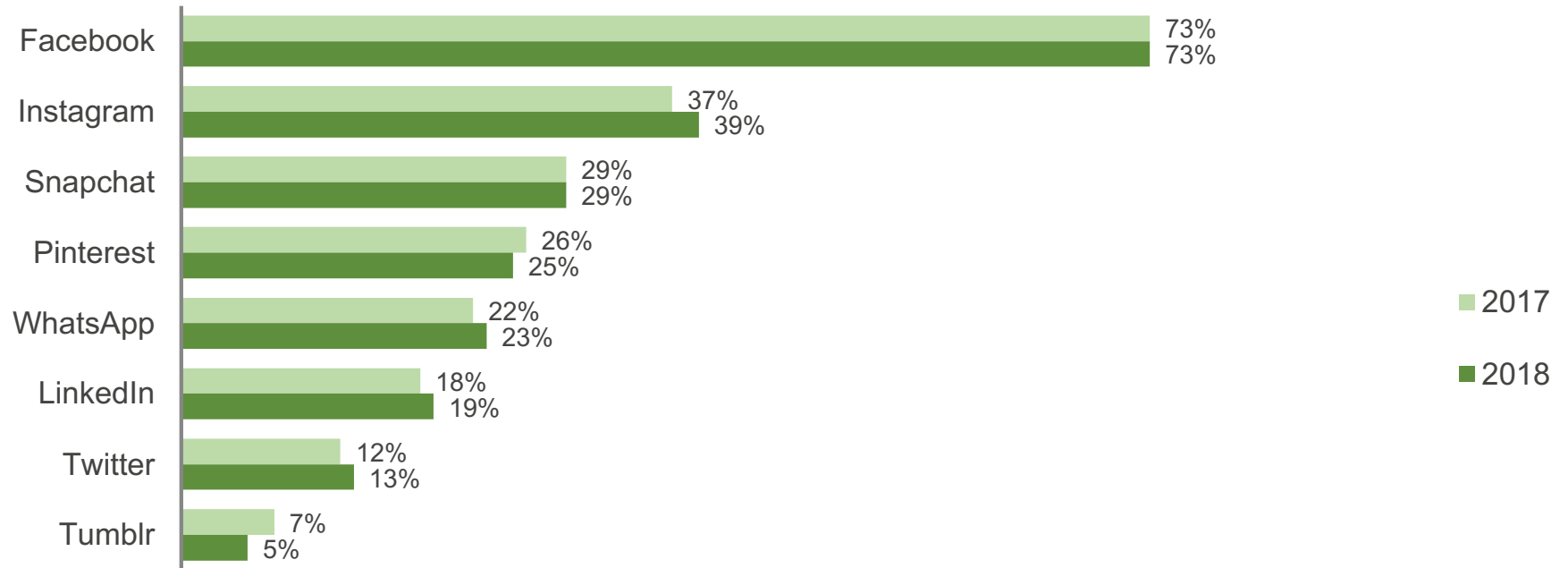
Overall Social Media Usage in Australia





Social Media Brand Usage in Australia

Base: Total Population 12+

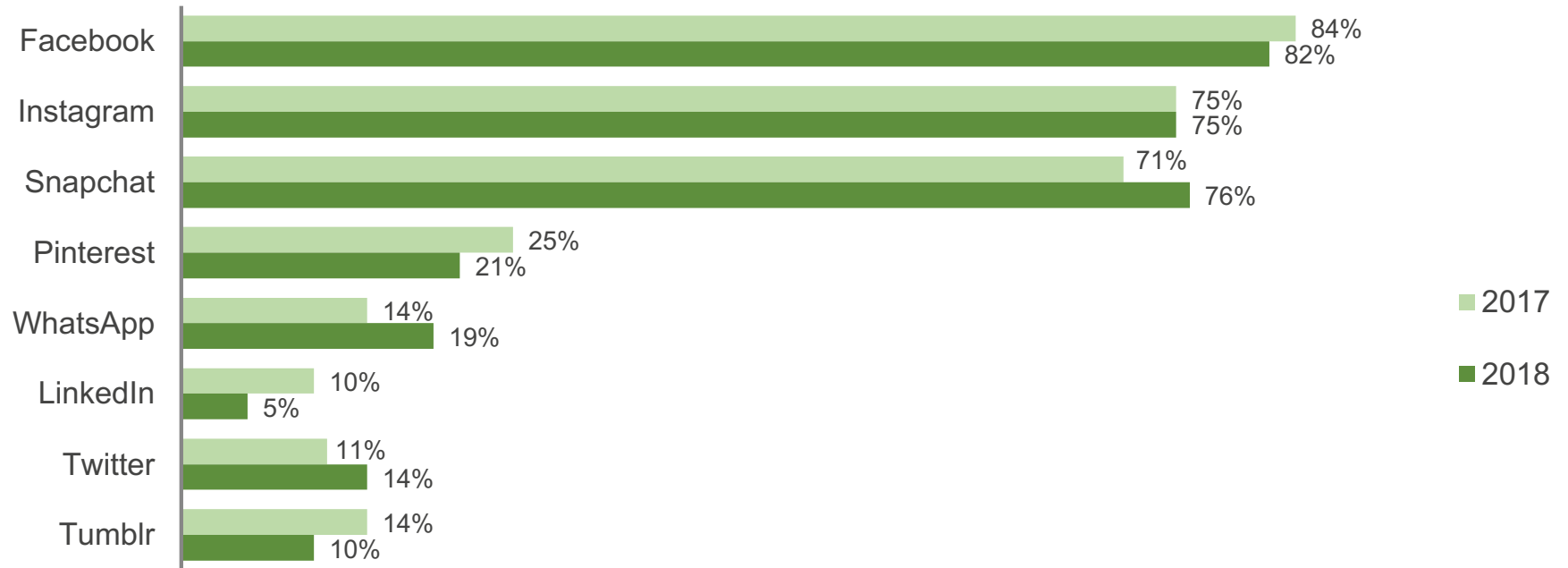


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Social Media Brand Usage in Australia (Age 12-24)



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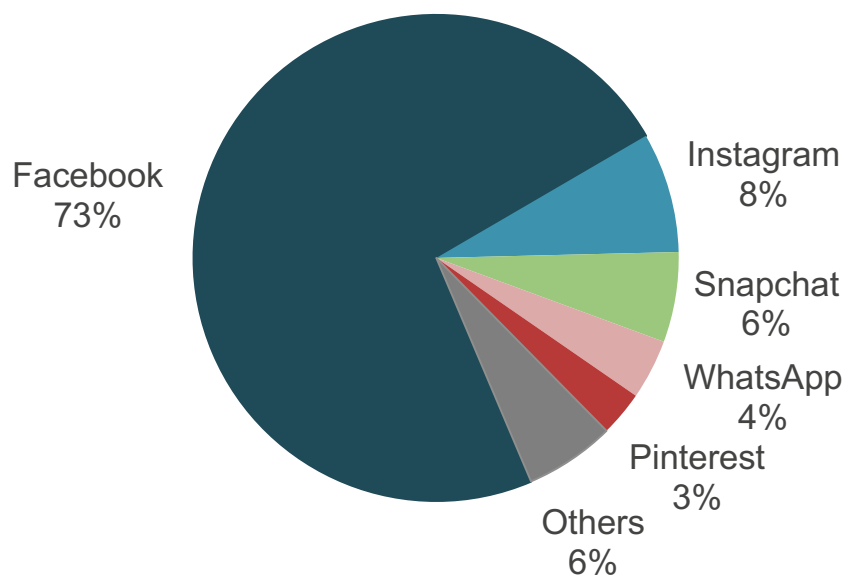




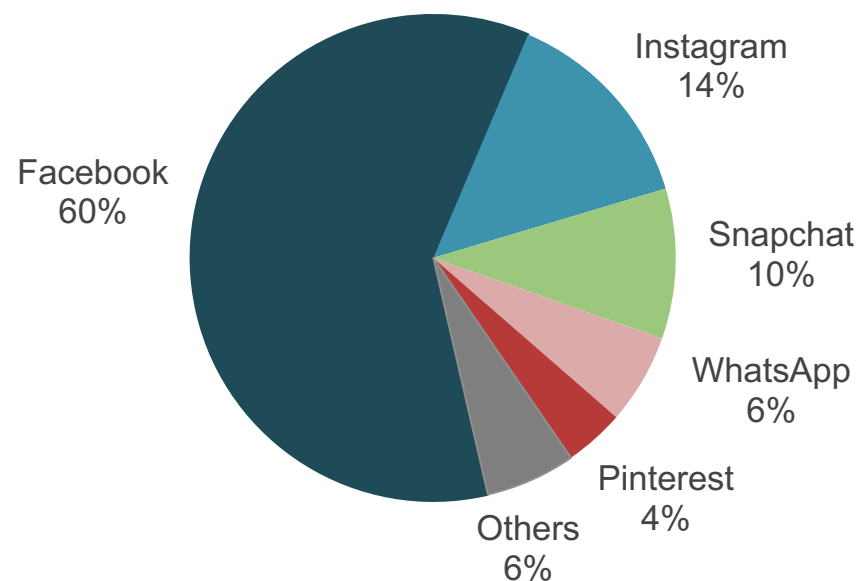
Social Media Brand Used Most Often in Australia

Base: Currently use any social networking brands

2017



2018



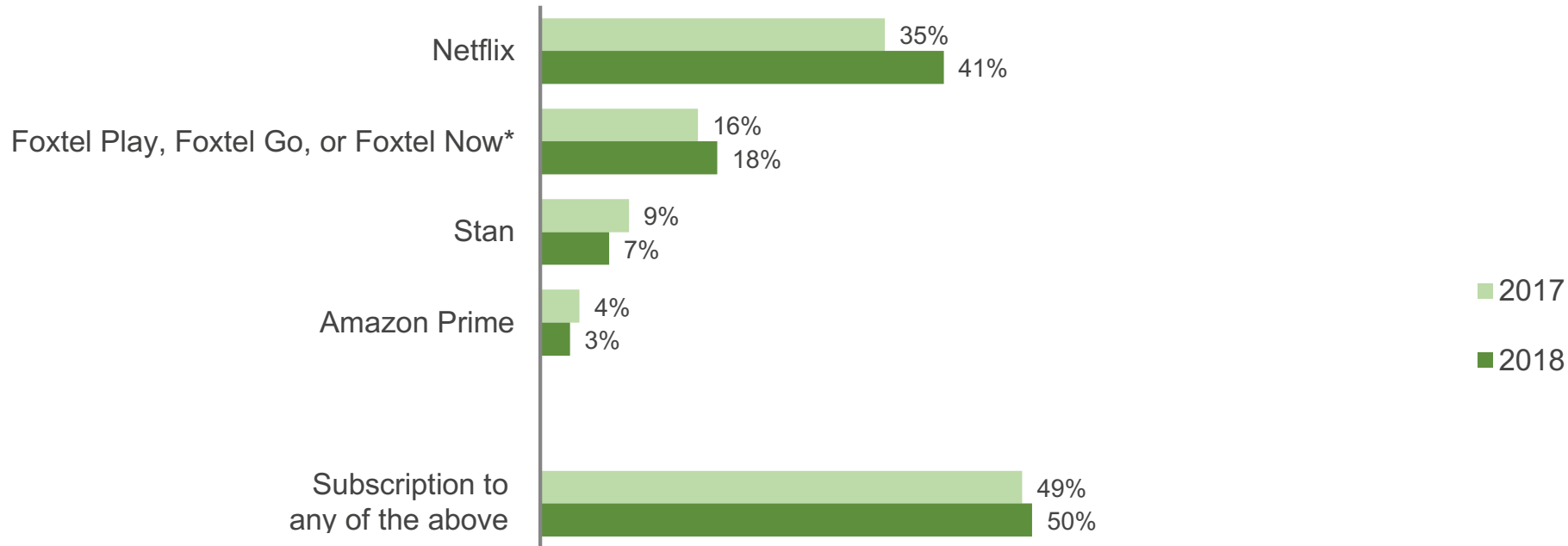
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On-Demand Video Service Subscription in Australia

Base: Total Population 12+



*2017: Foxtel Play, Foxtel Go, or Presto

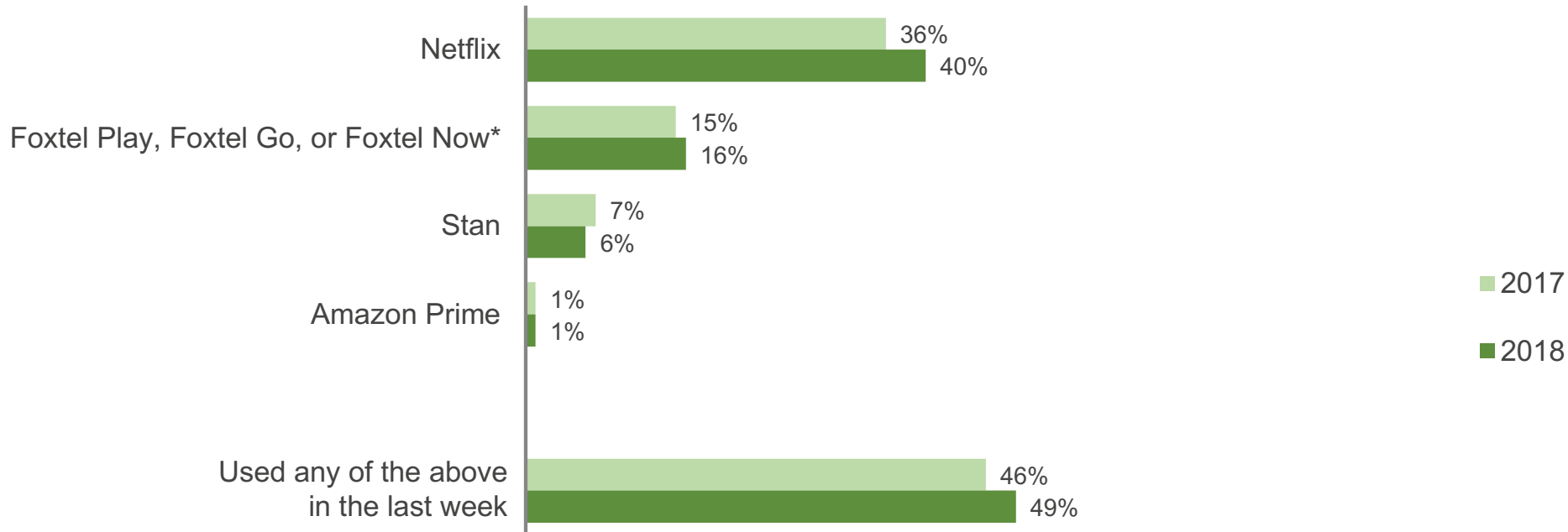
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Used On-Demand Video Service in Last Week in Australia

Base: Total Population 12+



*2017: Foxtel Play, Foxtel Go, or Presto

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Key Takeaways

- While broadcast radio is resilient and strong in the U.S. and Canada – the medium performs yet more strongly in Australia
- Australians use fewer audio options in their cars so radio is stronger there as well
- Online audio is not the same factor in Australia as in North America
- The concept of ‘Podcasting’ is better known in Australia than in the U.S. but usage is lower

Key Takeaways

- Smart Speakers are an exciting new factor that will likely increase in-home audio usage significantly
- New forms of digital media are major factors in Australia, driven in large measure by the Smartphone – which has even higher adoption in Australia than in the U.S.:
 - Social Media (Facebook leads, but is slipping)
 - YouTube
 - Netflix



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