The Infinite Dial 2021
Australia
#InfiniteDial
Study Overview

- Infinite Dial Australia explores the penetration of online digital audio in Australia, as well as the online platforms and technologies that Australians are using.

- 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.

- This is the fifth annual Infinite Dial Australia report.

- This study is designed to allow for direct comparisons between the Australian and U.S. markets.
Study Methodology

- In the first quarter of 2021, Edison Research conducted a national telephone survey of 1,001 Australians age 10+

- For comparison to U.S. Infinite Dial, this presentation shows data among those age 12+

- Data weighted to national 12+ population figures
Online Audio
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

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>2017</td>
<td>56</td>
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<tr>
<td>2018</td>
<td>53</td>
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<tr>
<td>2019</td>
<td>61</td>
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<tr>
<td>2020</td>
<td>67</td>
</tr>
<tr>
<td>2021</td>
<td>74</td>
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</tbody>
</table>
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

2017: 46%
2018: 47%
2019: 56%
2020: 63%
2021: 66%
Average Time Spent Listening to Online Audio

BASE: AUSTRALIAN 12+ WEEKLY ONLINE AUDIO LISTENERS

HOURS: MINUTES 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

<table>
<thead>
<tr>
<th>Year</th>
<th>Time (h:m)</th>
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<tbody>
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<tr>
<td>2020</td>
<td>12:37</td>
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<tr>
<td>2021</td>
<td>12:11</td>
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</table>
Radio: Live & On Demand
Listening to Radio Content in Last Month – Live & On Demand

Total Australian Population 12+

% LISTENED TO OVER-THE-AIR OR ONLINE AM/FM/DAB+ RADIO FOR AT LEAST 15 MINUTES IN LAST MONTH OR CATCH-UP PODCASTS AT LEAST ONCE A MONTH

2019: 87
2020: 85
2021: 86
Listening to Radio Content in Last Week – Live & On Demand

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO OVER-THE-AIR OR ONLINE AM/FM/DAB+ RADIO FOR AT LEAST 15 MINUTES IN LAST WEEK OR CATCH-UP PODCASTS AT LEAST ONCE A WEEK

2019: 83%
2020: 82%
2021: 80%
Sources Used to Listen to Online AM/FM/DAB+ Radio

Australian age 12+ and listened to AM, FM, or DAB+ radio stations through the internet

% using source to listen to AM/FM/DAB+ radio

- Radio station's website: 46%
- Radio station's app: 44%
- Aggregator app/website: 38%
- Smart speaker: 23%
In-Car Media
Audio Sources Used in Car

BASE: AUSTRALIAN AGE 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 88%
% USING AUDIO SOURCE IN CAR

- AM/FM/DAB+ radio: 84%
- Own music collection: 41%
- CD player: 39%
- Online audio streaming services*: 39%
- Podcasts: 30%
- In-dash system: 16%
- Online AM/FM stations: 10%

*SUCH AS SPOTIFY, YOUTUBE, OR APPLE MUSIC
Audio Sources Used in Car

BASE: AGE 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH

% USING AUDIO SOURCE IN CAR

- AM/FM radio: 84% (Aus 2021), 75% (U.S. 2021)
- CD player: 39% (Aus 2021), 35% (U.S. 2021)
- Own music collection: 41% (Aus 2021), 48% (U.S. 2021)
- Podcasts: 30% (Aus 2021), 30% (U.S. 2021)
- Online audio streaming services*: 39% (Aus 2021), 31% (U.S. 2021)
- SiriusXM: 21% (Aus 2021), 31% (U.S. 2021)

*SUCH AS SPOTIFY, YOUTUBE, OR APPLE MUSIC
In-Dash Systems that can Receive Info/Entertainment over the Internet

BASE: AUSTRALIAN AGE 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 88%
% OWNING IN-DASH SYSTEM THAT RECEIVES INFORMATION/ENTERTAINMENT OVER THE INTERNET

<table>
<thead>
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<th>Year</th>
<th>Percentage</th>
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<td>2018</td>
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<td>2019</td>
<td>16</td>
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<td>2020</td>
<td>19</td>
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<td>2021</td>
<td>25</td>
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Podcasting
Podcasting Awareness

TOTAL AUSTRALIAN POPULATION 12+

% AWARE OF PODCASTING

2017: 72%
2018: 78%
2019: 83%
2020: 87%
2021: 91%
Podcasting Awareness

POPULATIONS 12+

% AWARE OF PODCASTING

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<td>37</td>
<td>37</td>
<td>43</td>
<td>45</td>
<td>45</td>
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<td>60</td>
<td>64</td>
<td>70</td>
<td>75</td>
<td>78</td>
<td>91</td>
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</tbody>
</table>
Monthly Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO A PODCAST IN LAST MONTH

2017: 17
2018: 18
2019: 22
2020: 25
2021: 37
Monthly Podcast Listening

POPULATIONS 12+

% LISTENED TO A PODCAST IN LAST MONTH

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<td>24</td>
<td>26</td>
<td>32</td>
<td>37</td>
<td>41</td>
<td>37</td>
</tr>
</tbody>
</table>
Weekly Podcast Listening

TOTAL AUSTRALIAN POPULATION 12+
% LISTENED TO A PODCAST IN LAST WEEK

- 2017: 10%
- 2018: 13%
- 2019: 15%
- 2020: 17%
- 2021: 26%
Weekly Podcast Listening

POPULATIONS 12+

% LISTENED TO A PODCAST IN LAST WEEK

- U.S. 2013: 7%
- U.S. 2014: 8%
- U.S. 2015: 10%
- U.S. 2016: 13%
- U.S. 2017: 15%
- U.S. 2018: 17%
- U.S. 2019: 22%
- U.S. 2020: 24%
- U.S. 2021: 28%
- Aus 2021: 26%
Podcast Listening Locations

Base: Australian 12+ and listened to podcast in last month; 37%

% Listened to a podcast in location

- At home: 87%
- In a car/truck: 59%
- While walking around/on foot: 51%
- While riding public transportation: 39%
- At work: 27%
- At a gym/while working out: 24%
Device Used Most Often to Listen to Podcasts

BASE: AUSTRALIAN 12+ AND LISTENED TO PODCAST IN LAST MONTH; 37%

<table>
<thead>
<tr>
<th>Year</th>
<th>Smartphone/Tablet/Portable Device</th>
<th>Computer</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>69</td>
<td>31</td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>80</td>
<td>19</td>
<td></td>
</tr>
<tr>
<td>2019</td>
<td>79</td>
<td>16</td>
<td>5</td>
</tr>
<tr>
<td>2020</td>
<td>89</td>
<td>9</td>
<td>2</td>
</tr>
<tr>
<td>2021</td>
<td>73</td>
<td>15</td>
<td>8</td>
</tr>
</tbody>
</table>

#TheInfiniteDial
Number of Podcasts Listened to in Last Week

BASE: AUSTRALIAN 12+ AND LISTENED TO PODCAST IN LAST WEEK; 26%

Australian weekly podcast listeners averaged **five podcasts** in the last week.
Smart Speakers
Smart Speaker Ownership

TOTAL AUSTRALIAN POPULATION 12+

% OWNING A SMART SPEAKER

2018: 5
2019: 13
2020: 17
2021: 26
Smart Speaker Ownership

POPULATIONS 12+
% OWNING A SMART SPEAKER

U.S. 2017: 7
U.S. 2018: 18
U.S. 2019: 23
U.S. 2020: 27
U.S. 2021: 33
Aus 2021: 26

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Smart Speaker Ownership

TOTAL AUSTRALIAN POPULATION 12+
% OWNING SMART SPEAKER BRAND

Google Nest
- 2018: 3%
- 2019: 10%
- 2020: 14%
- 2021: 24%

Amazon Alexa
- 2018: 1%
- 2019: 1%
- 2020: 3%

Apple HomePod
- < 1%
- 2020: 1%
- 2021: 1%
Number of Smart Speakers in Household

BASE: AUSTRALIAN 12+ WHO OWN A SMART SPEAKER

<table>
<thead>
<tr>
<th>Year</th>
<th>One</th>
<th>Two</th>
<th>Three or More</th>
<th>Mean # of Smart Speakers</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>74</td>
<td>16</td>
<td>10</td>
<td>1.4</td>
</tr>
<tr>
<td>2020</td>
<td>56</td>
<td>31</td>
<td>13</td>
<td>1.7</td>
</tr>
<tr>
<td>2021</td>
<td>55</td>
<td>21</td>
<td>24</td>
<td>1.9</td>
</tr>
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</table>
Number of Smart Speakers in Household

BASE: AGE 12+ WHO OWN A SMART SPEAKER

<table>
<thead>
<tr>
<th>Country</th>
<th>ONE</th>
<th>TWO</th>
<th>THREE OR MORE</th>
<th>MEAN # OF SMART SPEAKERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aus 2021</td>
<td>55</td>
<td>21</td>
<td>24</td>
<td>1.9</td>
</tr>
<tr>
<td>U.S. 2021</td>
<td>47</td>
<td>19</td>
<td>34</td>
<td>2.2</td>
</tr>
</tbody>
</table>
Online Audio Streaming Services
Awareness of Online Audio Streaming Services

TOTAL AUSTRALIAN POPULATION 12+
% AWARE OF ONLINE AUDIO STREAMING SERVICE

- **Spotify**: 73% in 2017, 77% in 2018, 85% in 2019, 88% in 2020, 92% in 2021
- **Apple Music**: 72% in 2017, 75% in 2018, 83% in 2019, 88% in 2020
- **YouTube Music**: 81% in 2021
- **Amazon Music**: 37% in 2017, 45% in 2018, 48% in 2019, 64% in 2020
- **SoundCloud**: 42% in 2017, 46% in 2018, 51% in 2019

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Awareness of Online Audio Streaming Services

**Populations 12+**

% Aware of Online Audio Streaming Service

- **Spotify**: 92% (Aus 2021), 76% (U.S. 2021)
- **Apple Music**: 83% (Aus 2021), 72% (U.S. 2021)
- **YouTube Music**: 81% (Aus 2021), 68% (U.S. 2021)
- **Amazon Music**: 64% (Aus 2021), 70% (U.S. 2021)
- **SoundCloud**: 51% (Aus 2021), 46% (U.S. 2021)
Free vs. Paid Subscriptions to Online Audio Streaming Services

Base: Australian 12+ and listened to online audio streaming service in last month

<table>
<thead>
<tr>
<th>Service</th>
<th>Use Only the Free Service</th>
<th>Pay for a Subscription</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spotify</td>
<td>35</td>
<td>65</td>
</tr>
<tr>
<td>YouTube Music</td>
<td>85</td>
<td>15</td>
</tr>
<tr>
<td>SoundCloud</td>
<td>94</td>
<td>6</td>
</tr>
</tbody>
</table>
Weekly Listening to Online Audio Streaming Services

TOTAL AUSTRALIAN POPULATION 12+

% LISTENED TO ONLINE AUDIO STREAMING SERVICE IN LAST WEEK

- **Spotify**
  - 2017: 21
  - 2018: 26
  - 2019: 34
  - 2020: 40
  - 2021: 42

- **YouTube Music**
  - 2017: 16

- **Apple Music**
  - 2017: 6
  - 2018: 7
  - 2019: 8
  - 2020: 8

- **SoundCloud**
  - 2017: 5
  - 2020: 3

- **Amazon Music**
  - 2017: 1
  - 2020: 1

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Weekly Usage of YouTube for Music or Music Video

TOTAL AUSTRALIAN POPULATION 12+
% USED YOUTUBE FOR MUSIC OR MUSIC VIDEOS IN LAST WEEK

- 2017: 44%
- 2018: 47%
- 2019: 48%
- 2020: 45%
- 2021: 39%
Observations

• Despite the disruptions of 2020, or more likely on account of the disruptions, digital audio options grew at a significant pace
Observations

• Podcasts make a big leap forward in Australia, now just mere months behind the figures we see in the USA and Canada
Observations

• Smart Speakers also have a big year, likely propelled at least in part by people staying in their homes more

• Coming soon – the Smart Audio Report Australia
Observations

• Despite the advancements in digital usage and the disruptions of the last year, broadcast radio and its content continues to serve enormous numbers of Australians each week and month
Observations

• Spotify continues to set the pace among digital-only audio brands in Australia