



THE INFINITE DIAL

AUSTRALIA 2017

#INFINITEDIALAUSTRALIA



Study Overview

- The Infinite Dial is the longest-running survey of digital media consumer behavior in America
- This inaugural 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 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

Study Methodology

- In the first quarter of 2017, Edison Research conducted a national telephone survey of 1,007 people aged 12 and older
- Data weighted to national 12+ population figures

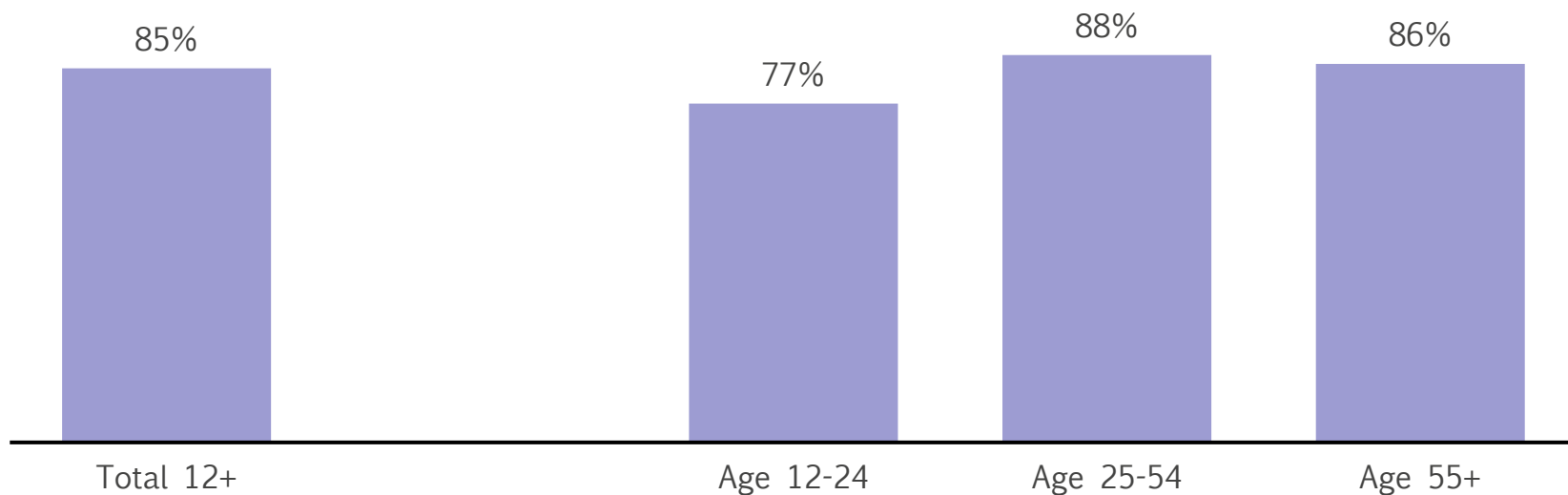


RADIO & RADIO SIMULCAST



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

% listened to AM/FM Radio in last week



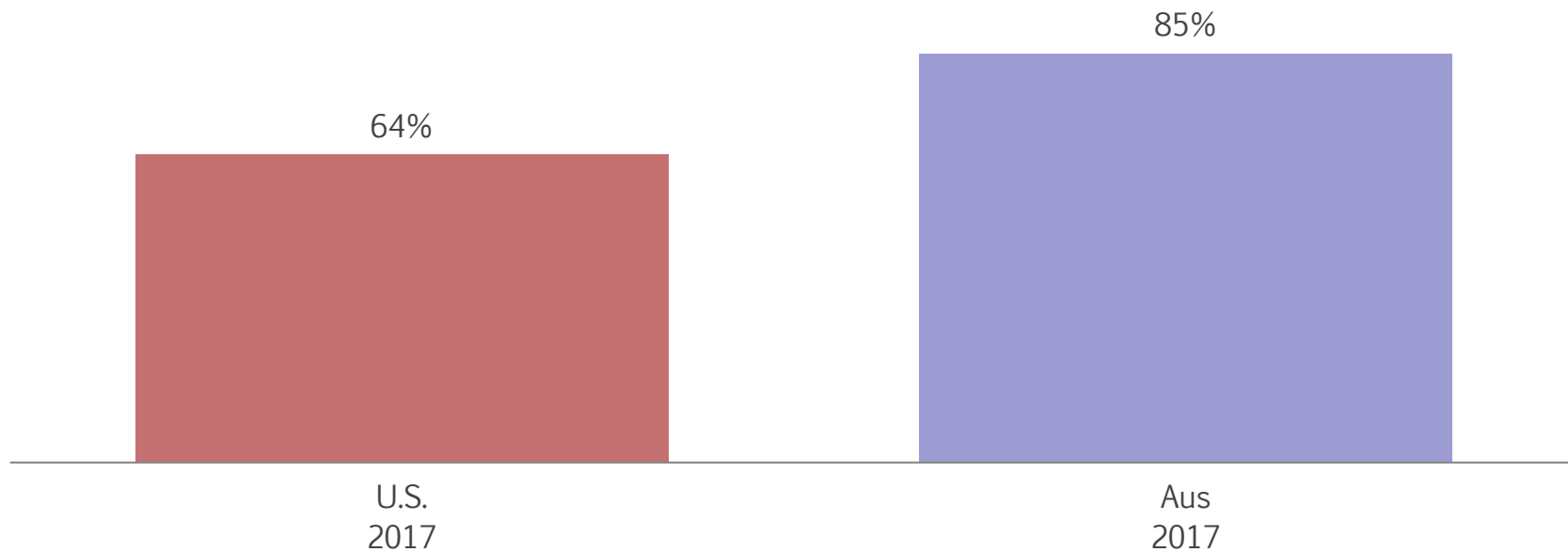
**AM/FM Radio includes both "over-the-air" and online*



Listening to AM/FM Radio in the Last Week

Base: Total Population 12+

% listened to AM/FM Radio in last week



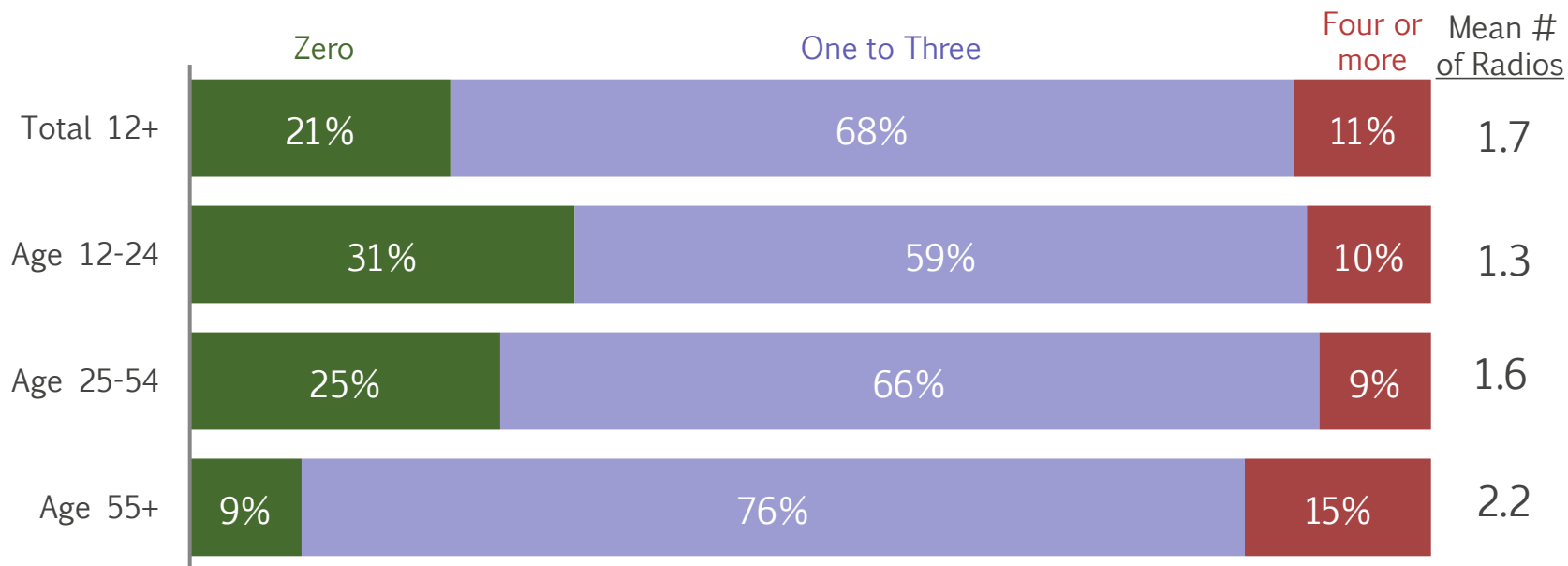
**AM/FM Radio includes both "over-the-air" and online*



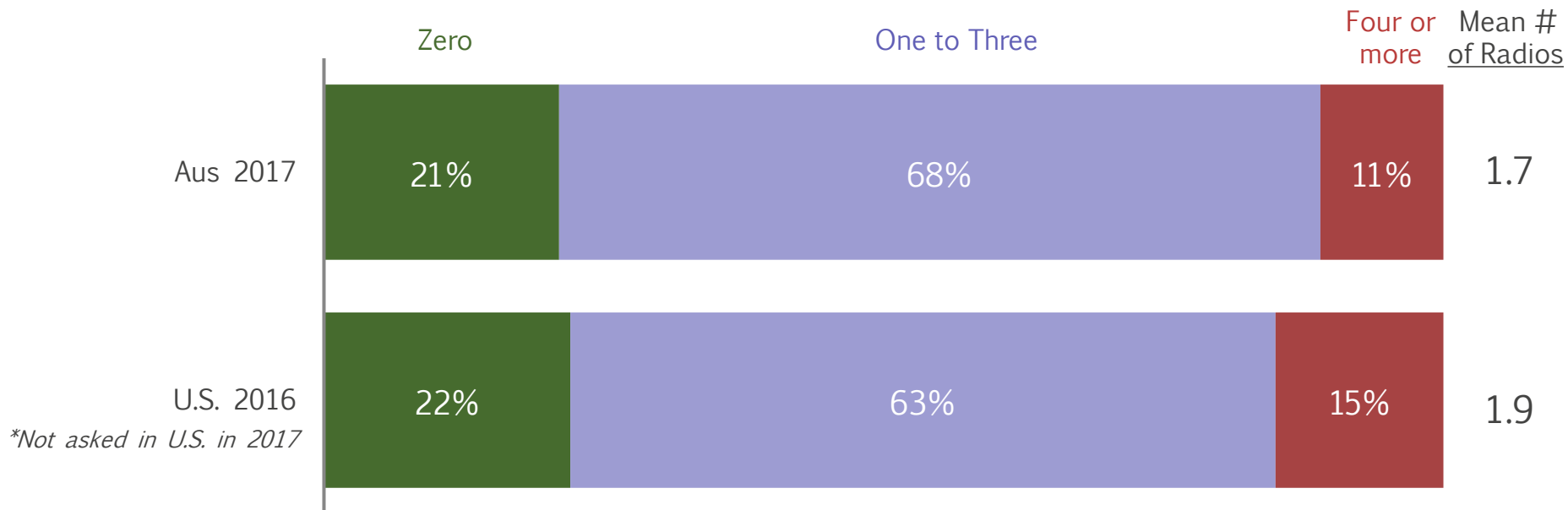
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Number of Radios Owned in Homes in Australia

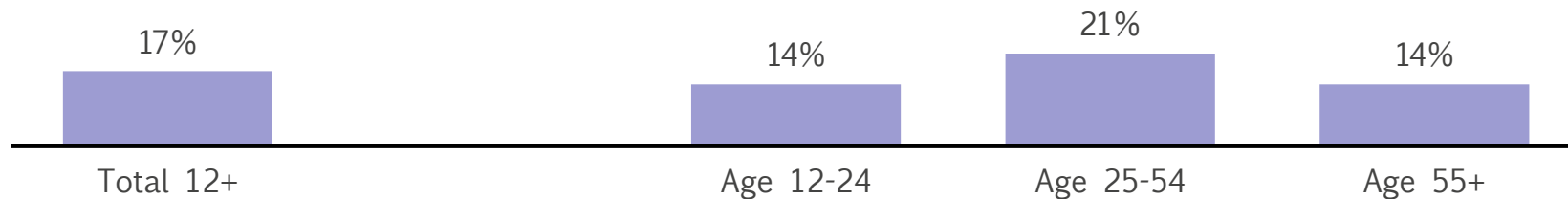


Number of Radios Owned in Home



Online Listening to AM/FM Radio in Australia in the Last Month

% listened to AM/FM radio stations online in last month

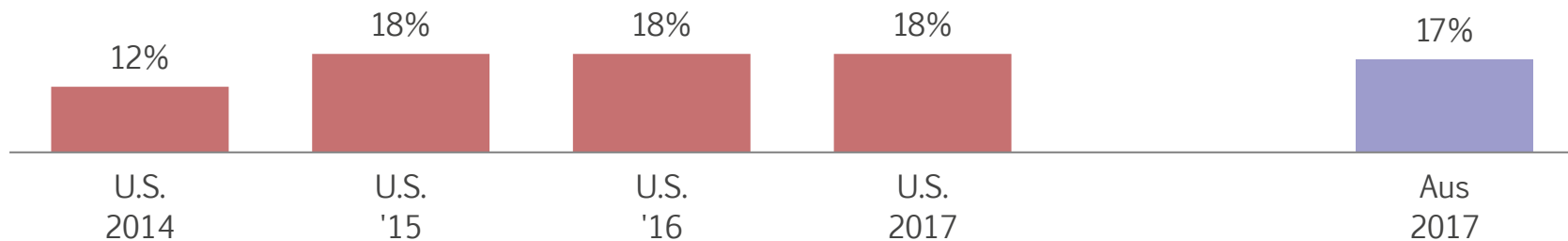




Online Listening to AM/FM Radio in the Last Month

Base: Total Population 12+

% listened to AM/FM radio stations online in last month



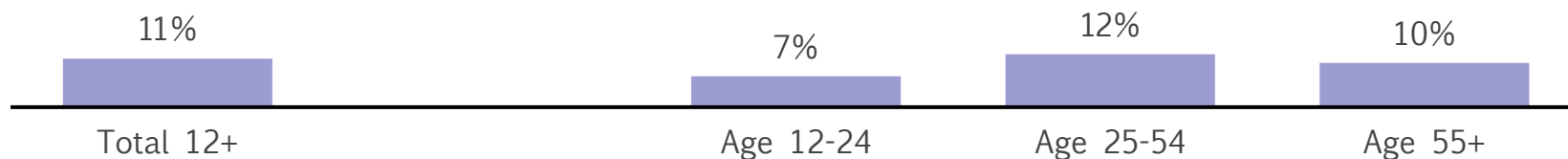
Sponsored by:





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

% listened to AM/FM radio stations online in last week



Sponsored by:





AUDIO AGGREGATORS

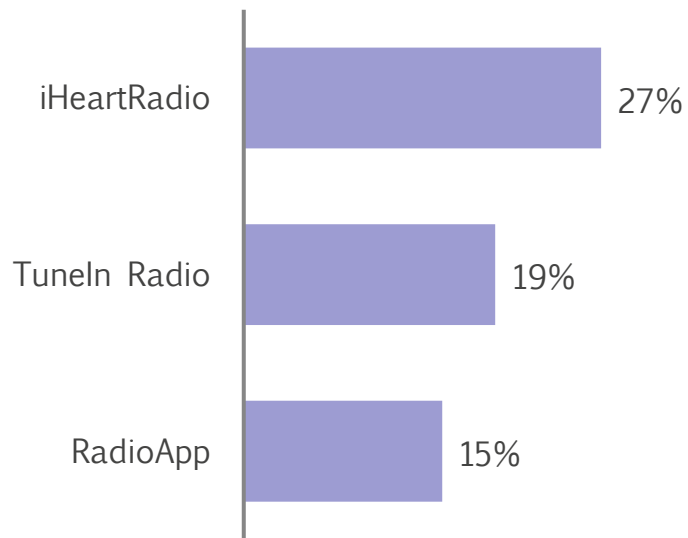




Audio Aggregator Brand Awareness in Australia

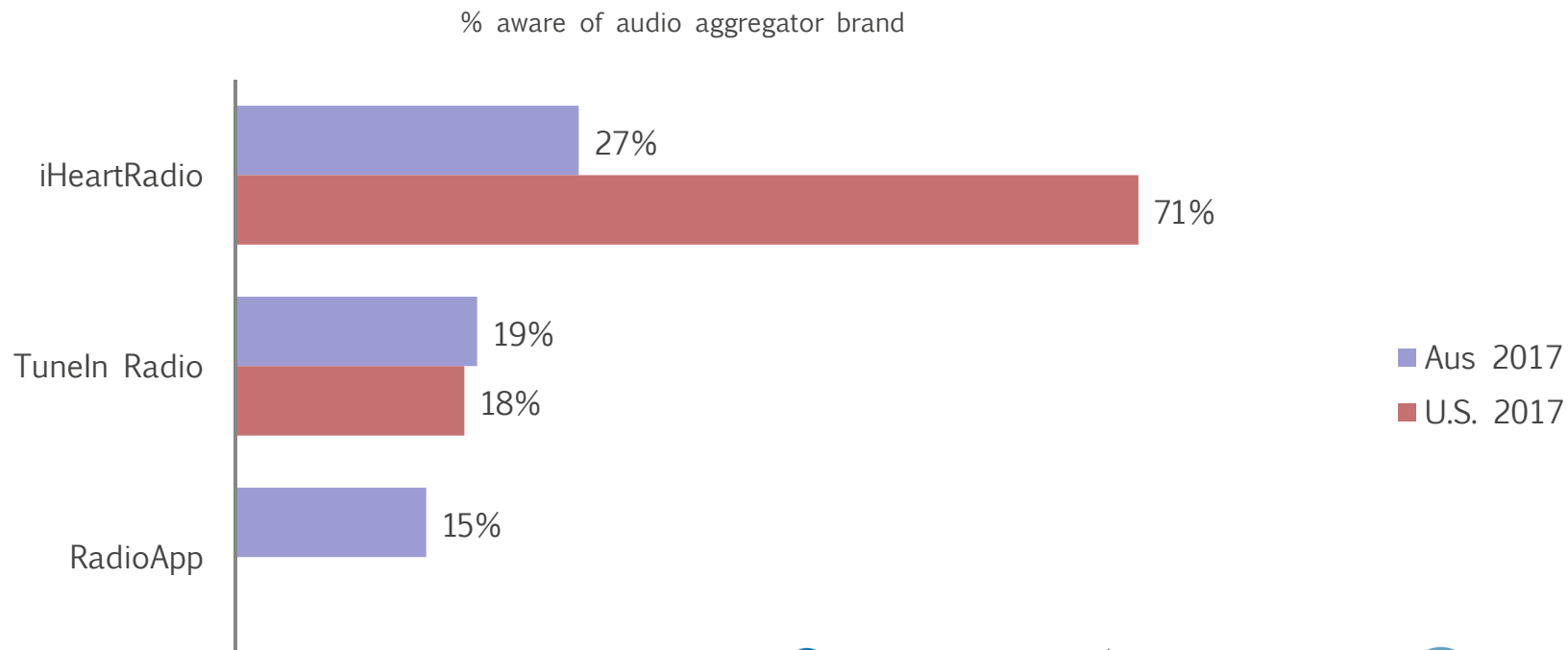
Base: Total Population 12+

% aware of audio aggregator brand



Audio Aggregator Brand Awareness

Base: Total Population 12+

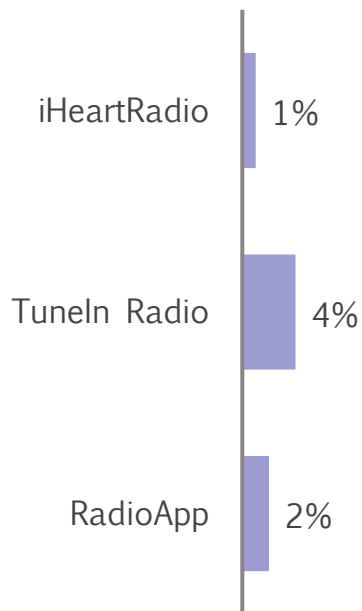




Audio Aggregators: Monthly Listening in Australia

Base: Total Population 12+

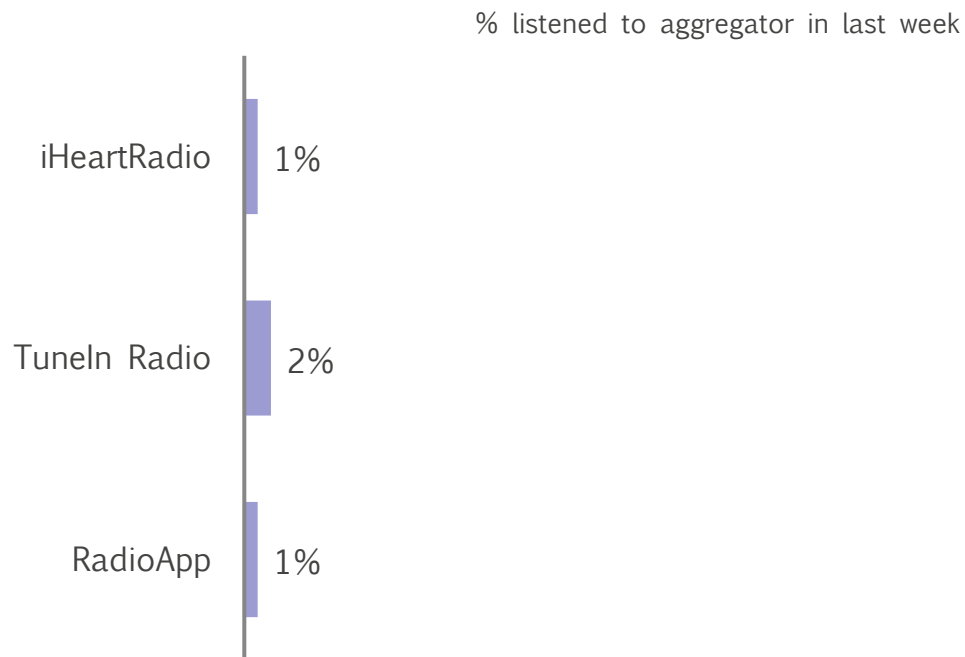
% listened to aggregator in last month





Audio Aggregators: Weekly Listening in Australia

Base: Total Population 12+



Sponsored by:





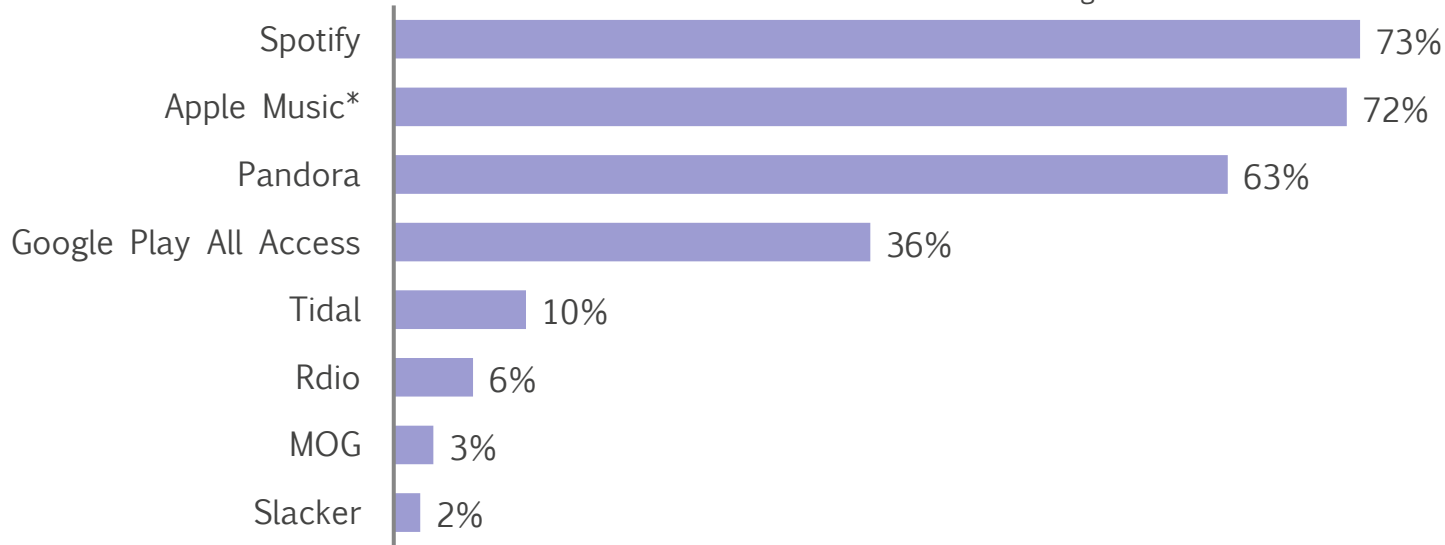
ONLINE AUDIO STREAMING SERVICES



Awareness of Online Audio Streaming Services in Australia

Base: Total Population 12+

% aware of online audio streaming service

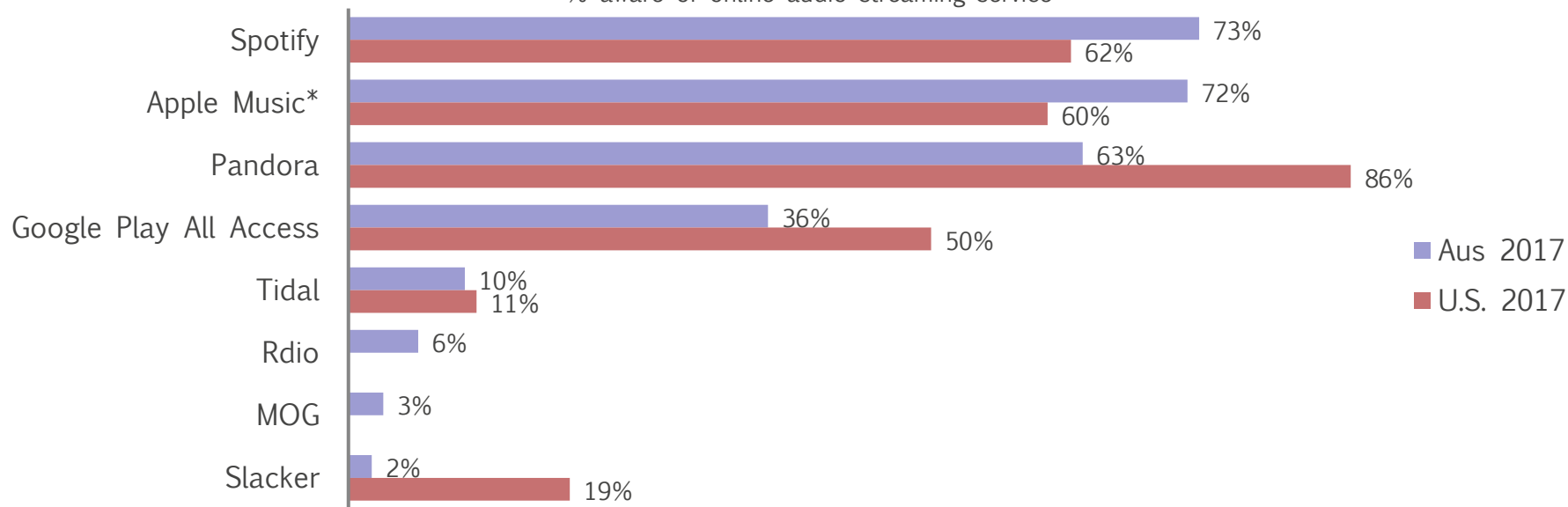


*Asked as "Apple Music, the paid music subscription from Apple"

Awareness of Online Audio Streaming Services

Base: Total Population 12+

% aware of online audio streaming service

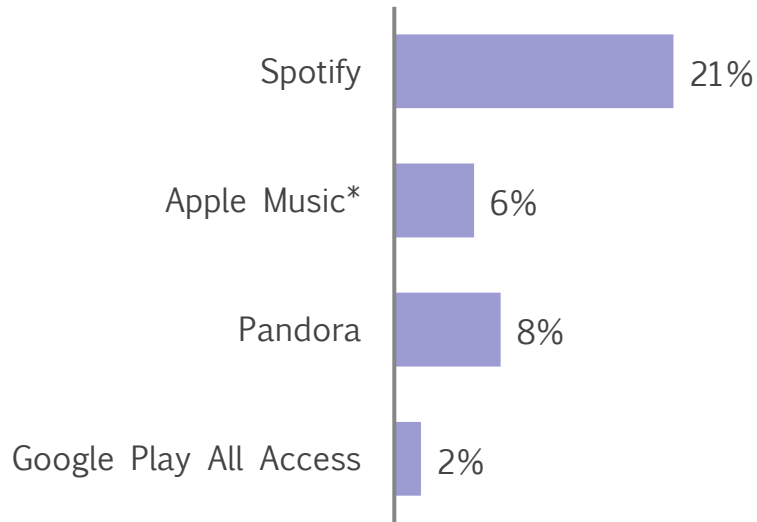


*Asked as "Apple Music, the paid music subscription from Apple"

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

Base: Total Population 12+

% listened to online audio streaming service in last week



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



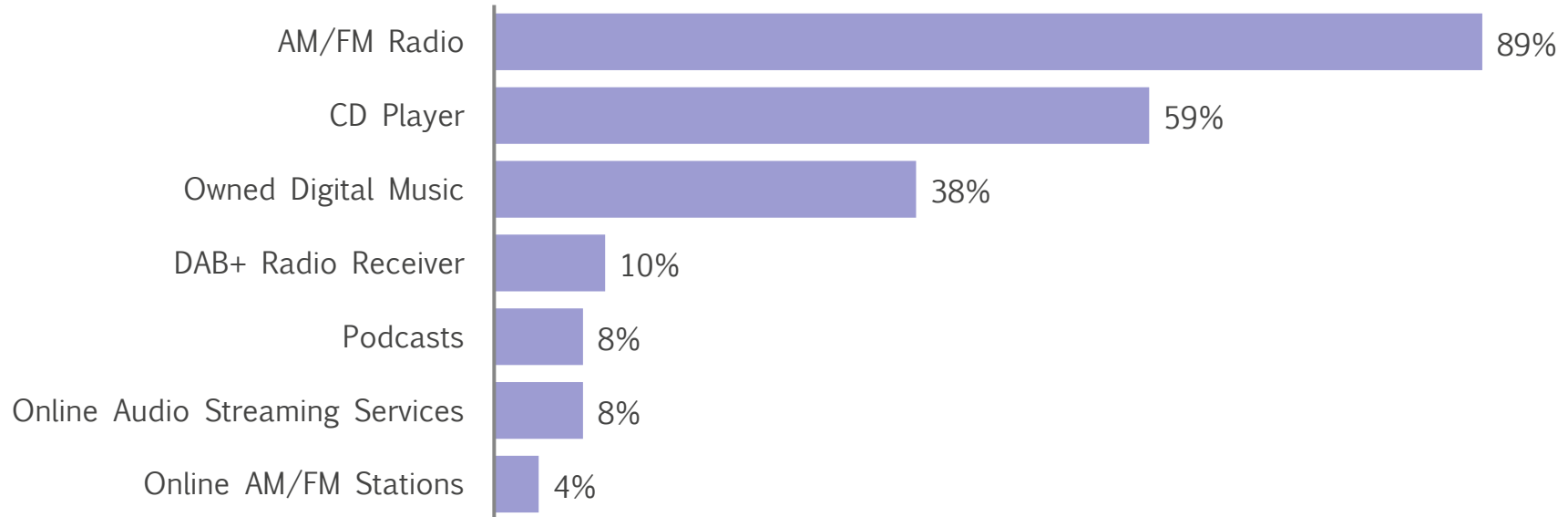
IN-CAR AUDIO



Audio Sources Used in Car in Australia

Base: Age 18+ and has driven/ridden in car in last month; 88%

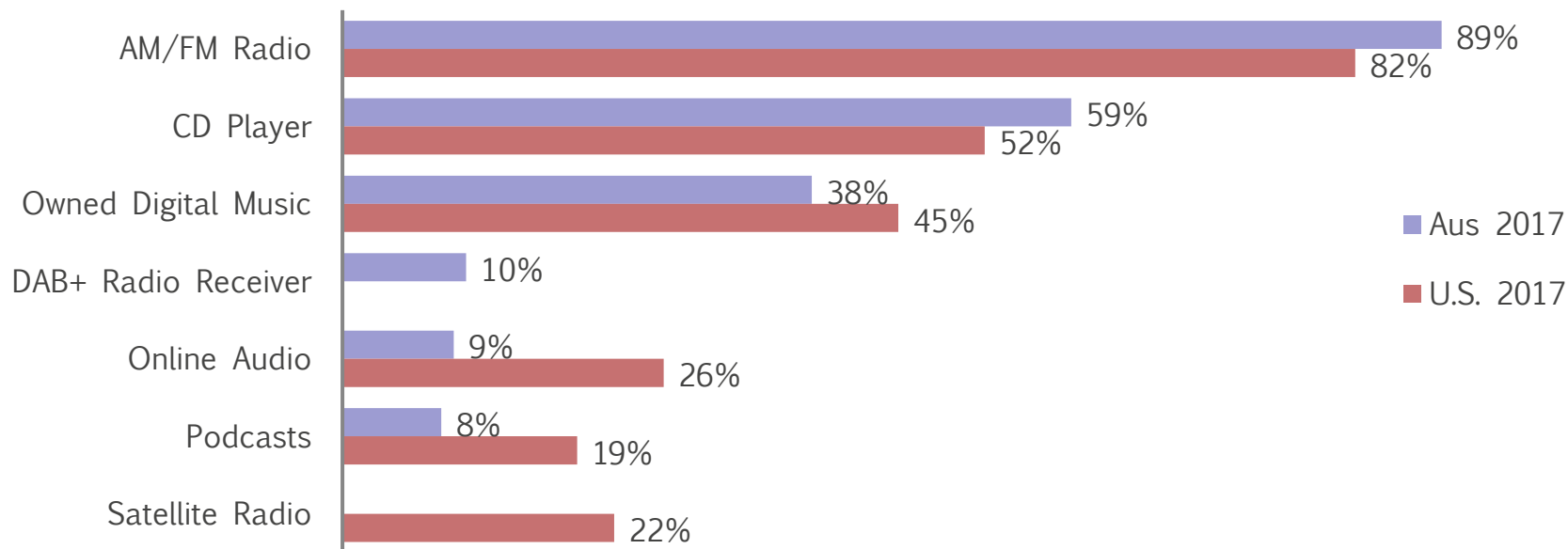
% currently ever using audio source in car



Audio Sources Used in Car

Base: Age 18+ and has driven/ridden in car in last month; 88%

% currently ever using audio source in car

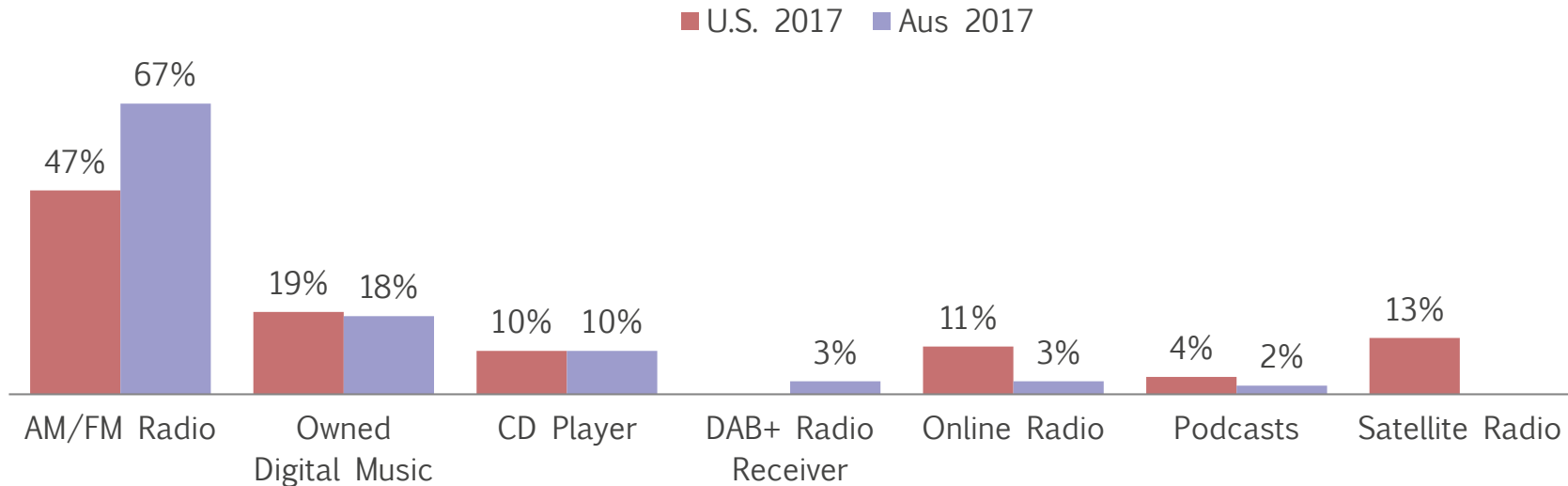


Audio Sources Used at Least 'Most of the Times' in Car

"In your primary car, how often do you use...?"

Base: Age 18+ and has driven/ridden in car in last month; 88%

% using audio source "most of" or "almost all of" times in car



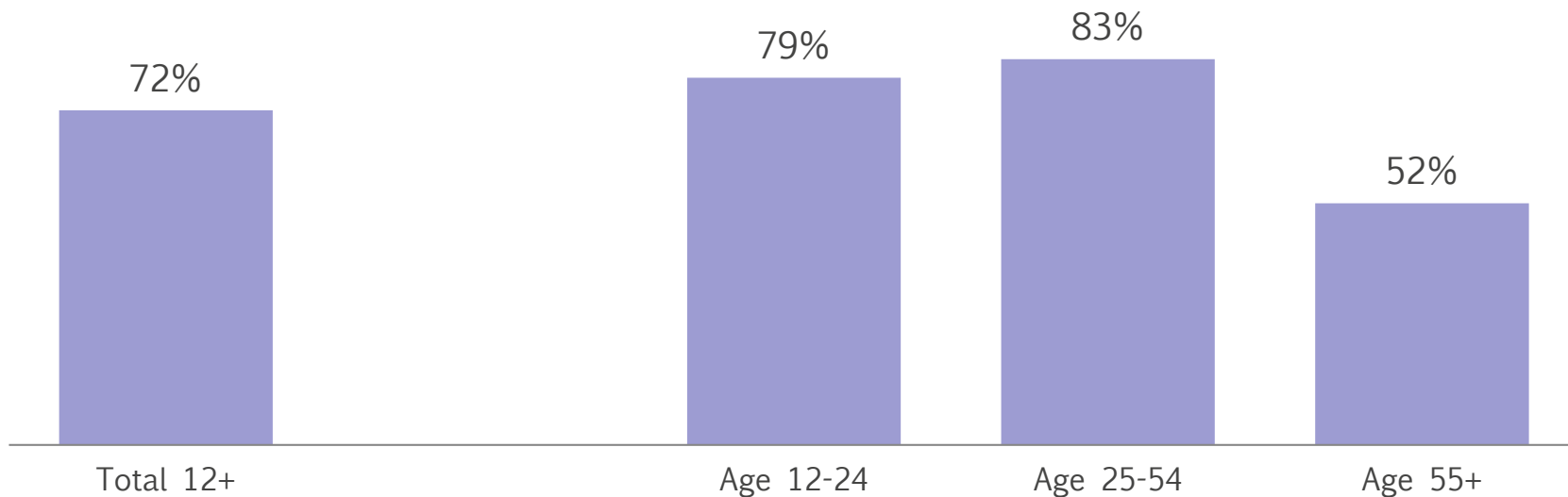


PODCASTING



Familiar with the term “Podcasting” in Australia

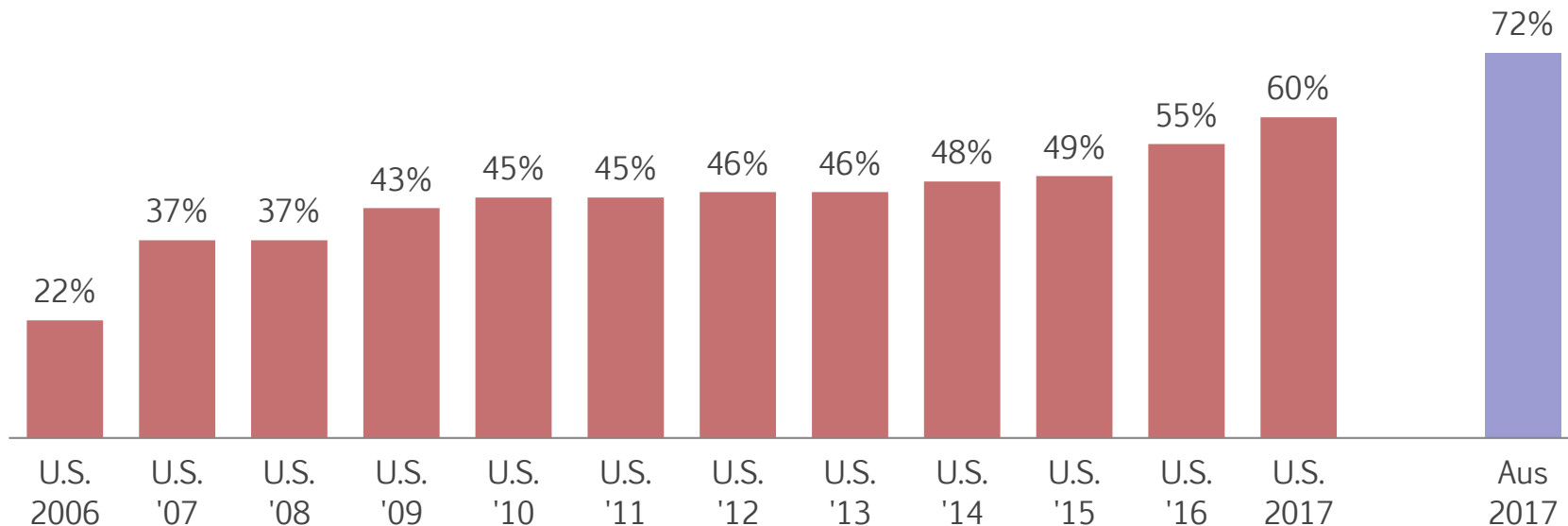
% familiar with the term podcasting



Familiar with the term “Podcasting”

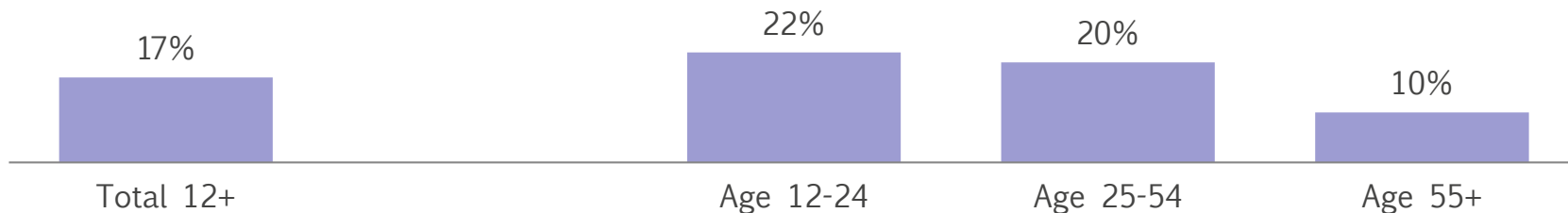
Base: Total Population 12+

% familiar with the term podcasting



Monthly Podcast Listening in Australia

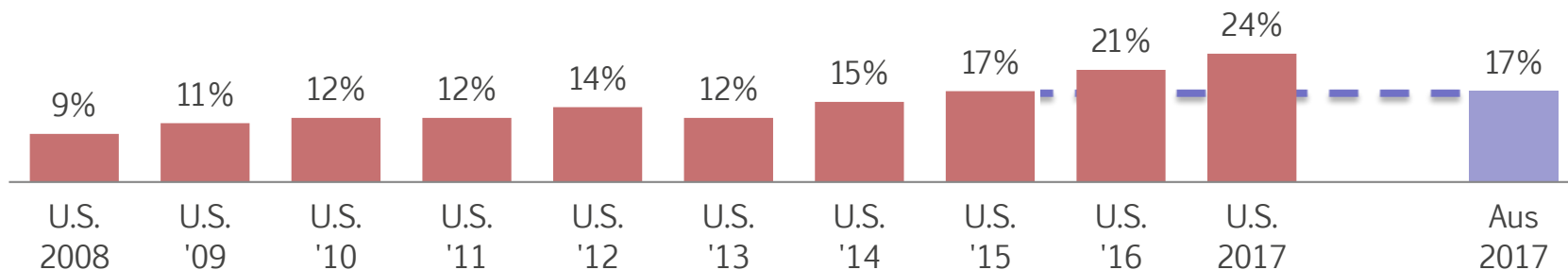
% listened to a podcast in the last month



Monthly Podcast Listening

Base: Total Population 12+

% listened to a podcast in the last month

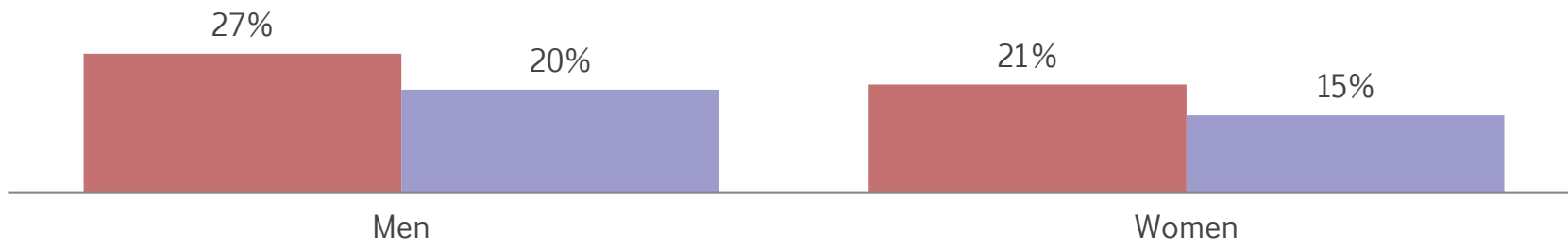


Monthly Podcast Listening

Base: Total Population 12+

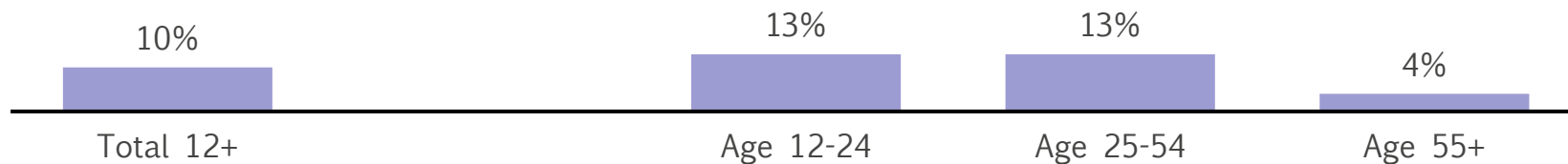
% listened to a podcast in the last month

■ U.S. 2017 ■ Aus 2017



Weekly Podcast Listening in Australia

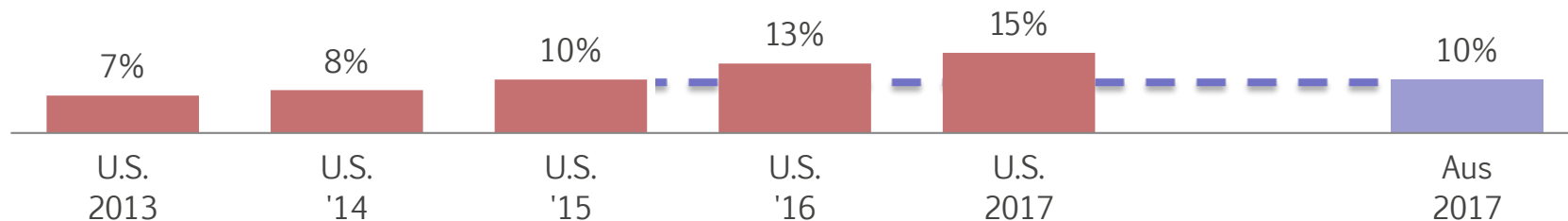
% listened to a podcast in the last week



Weekly Podcast Listening

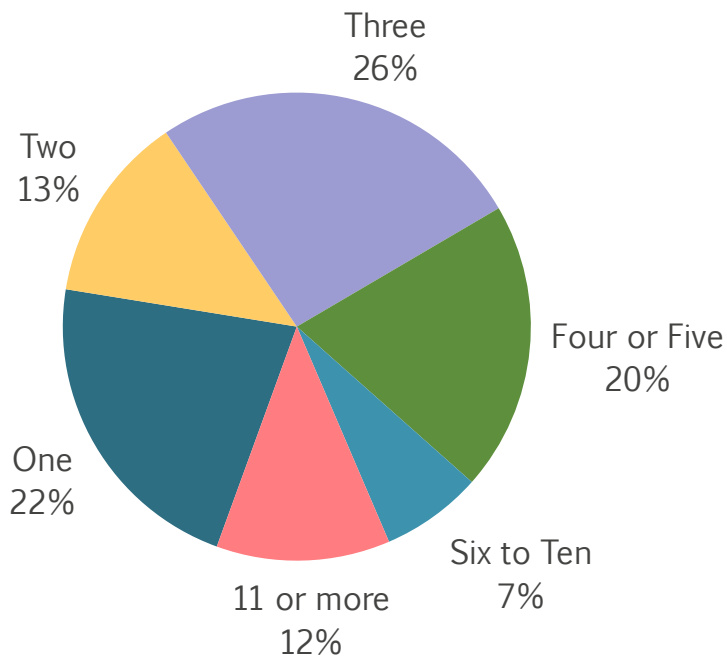
Base: Total Population 12+

% listened to a podcast in the last week



Number of Podcasts Listened to in Last Week in Australia

Base: Weekly Podcast Listeners

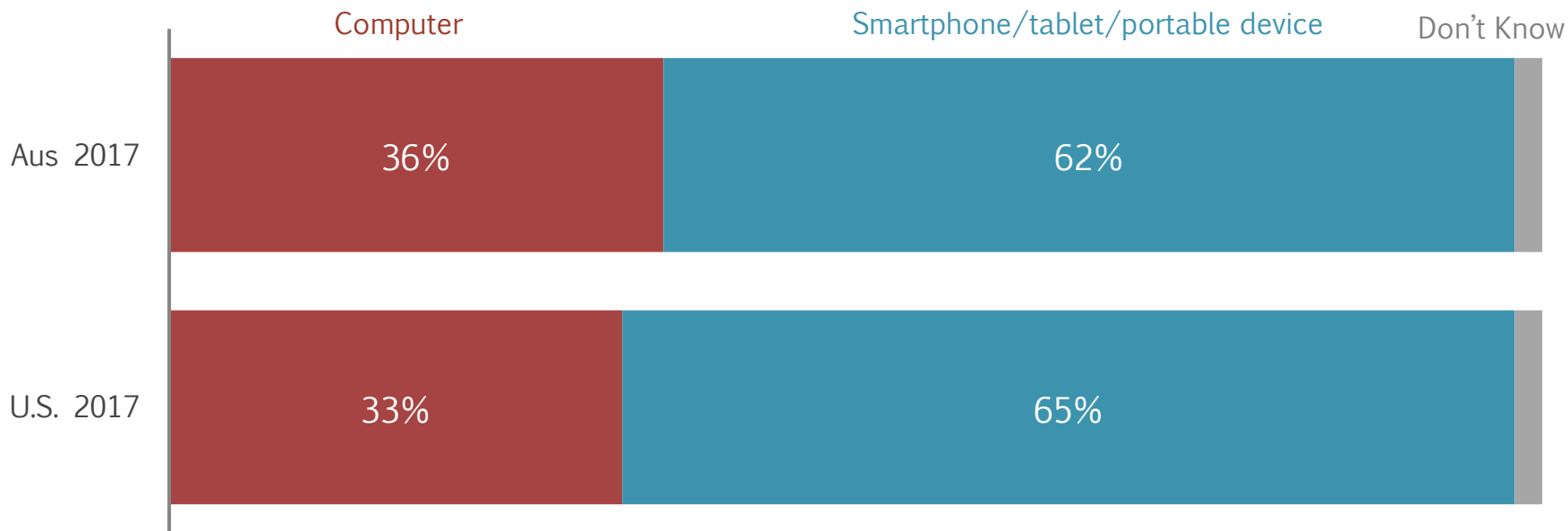


Average of six
podcasts listened
in last week



Device Used Most Often to Listen to Podcasts

Base: Ever Listened to a Podcast



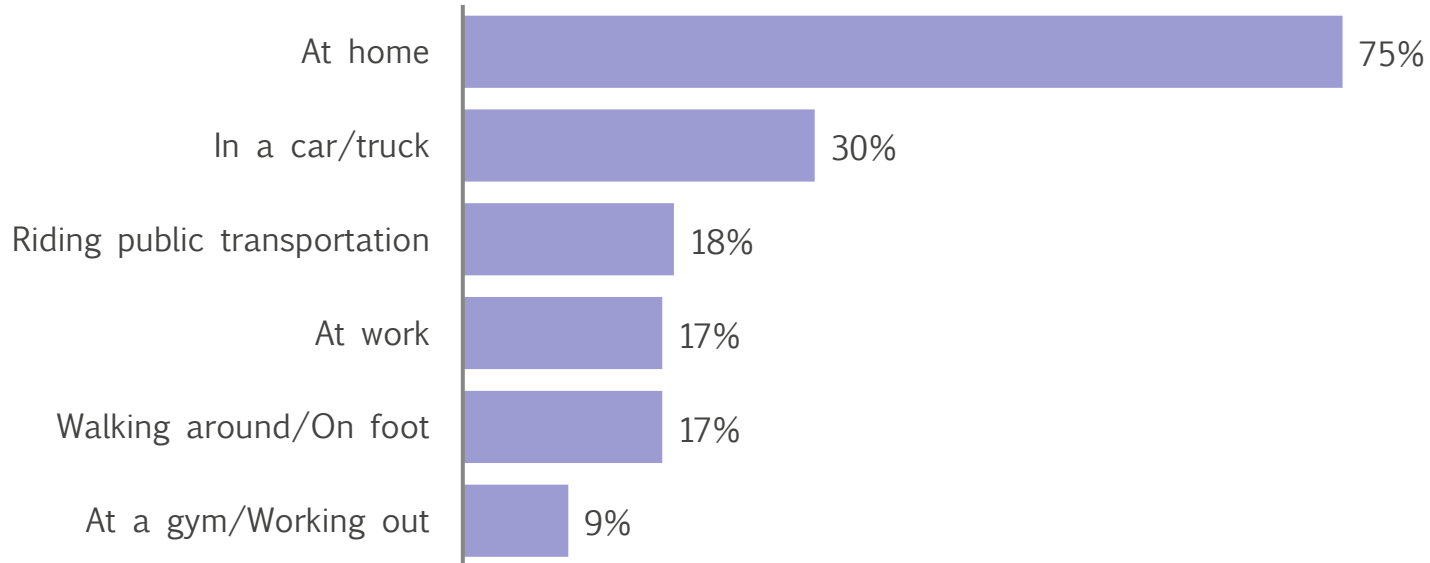
Sponsored by:



Podcast Listening Locations in Australia

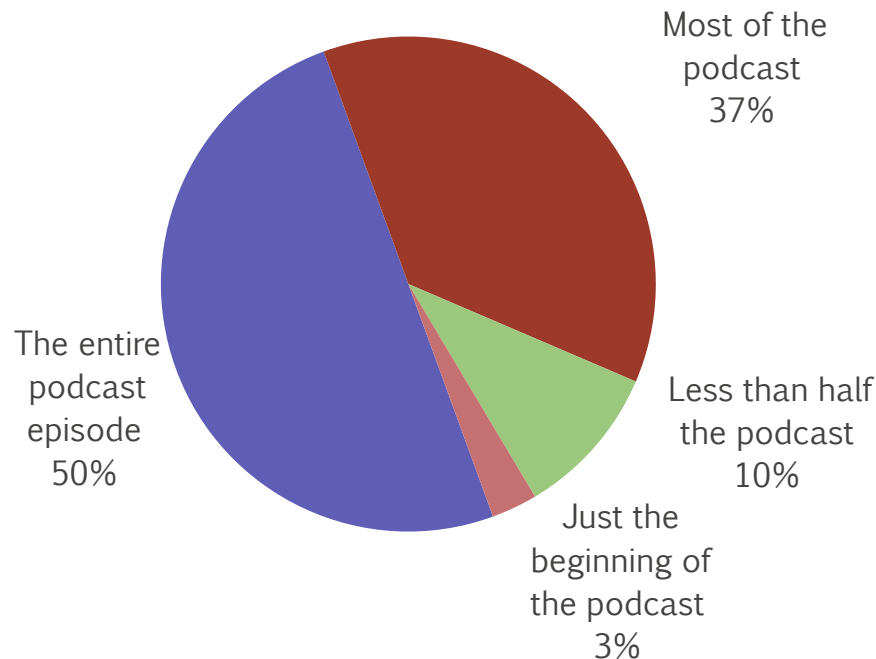
Base: Weekly Podcast Listeners

% ever listened to podcasts in location



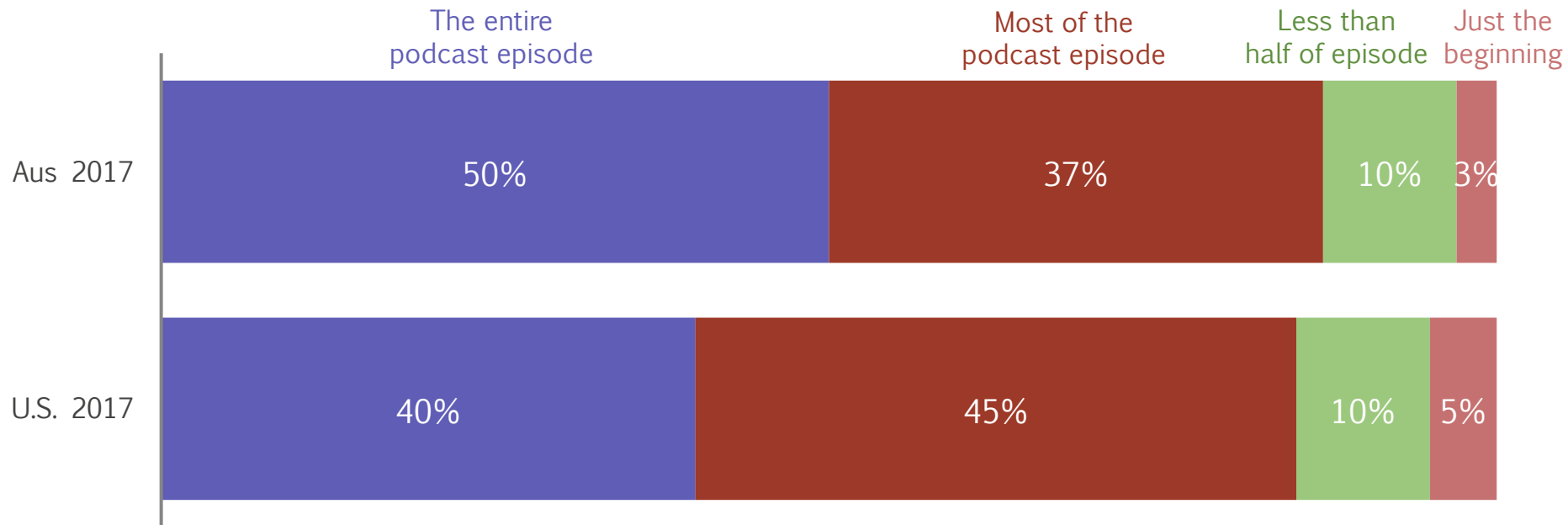
Amount of Podcast Episode Listened to in Australia

Base: Ever Listened to a Podcast



Amount of Podcast Episode Listened To

Base: Ever Listened to a Podcast





Method of Listening to Podcasts in Australia

Base: Ever listened to a podcast

% ever using method to listen to podcasts

Click on podcast
and listen immediately



62%

Download podcast
manually and listen later



48%

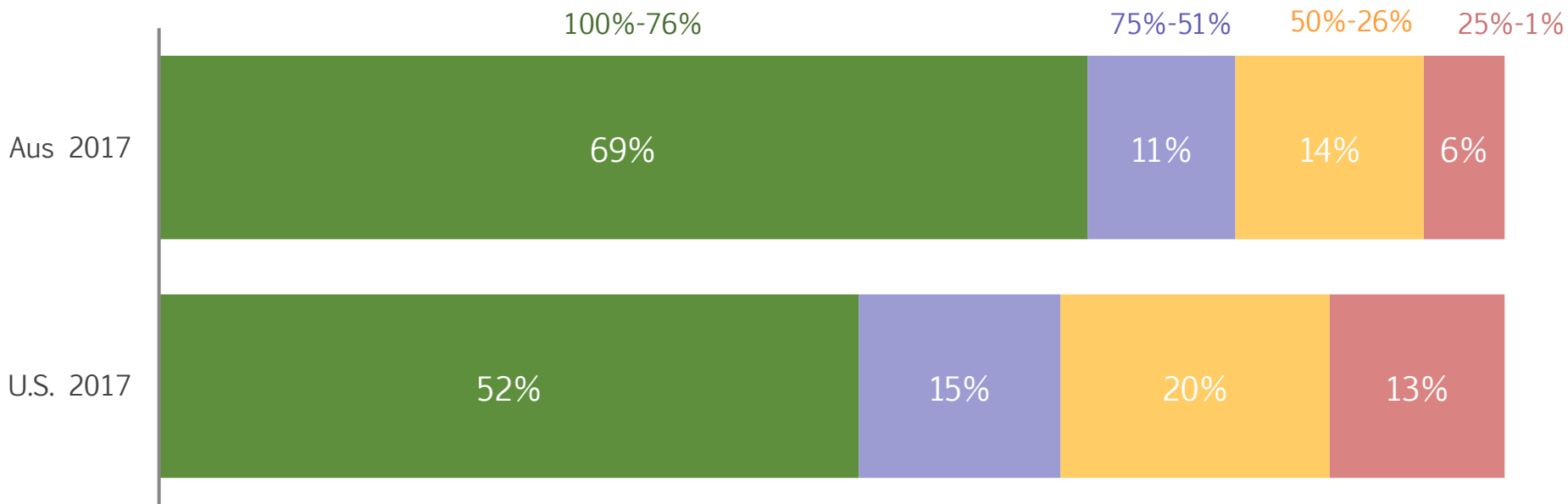
Subscribe to podcast and download
automatically to listen later



27%

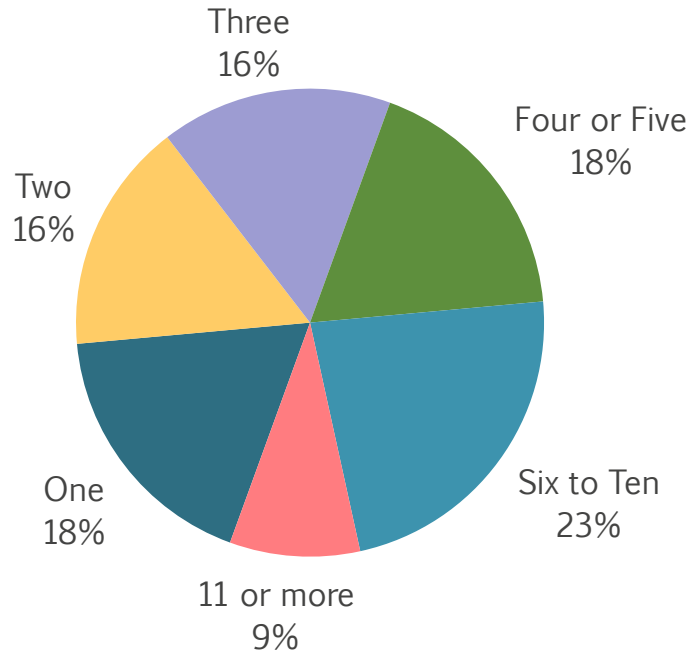
Percent of all podcasts downloaded and then listened to

Base: Have ever downloaded podcasts to listen at a later time



Number of Podcasts Subscribed to in Australia

Base: Have ever subscribed to podcasts



Average of five
podcasts
subscribed to

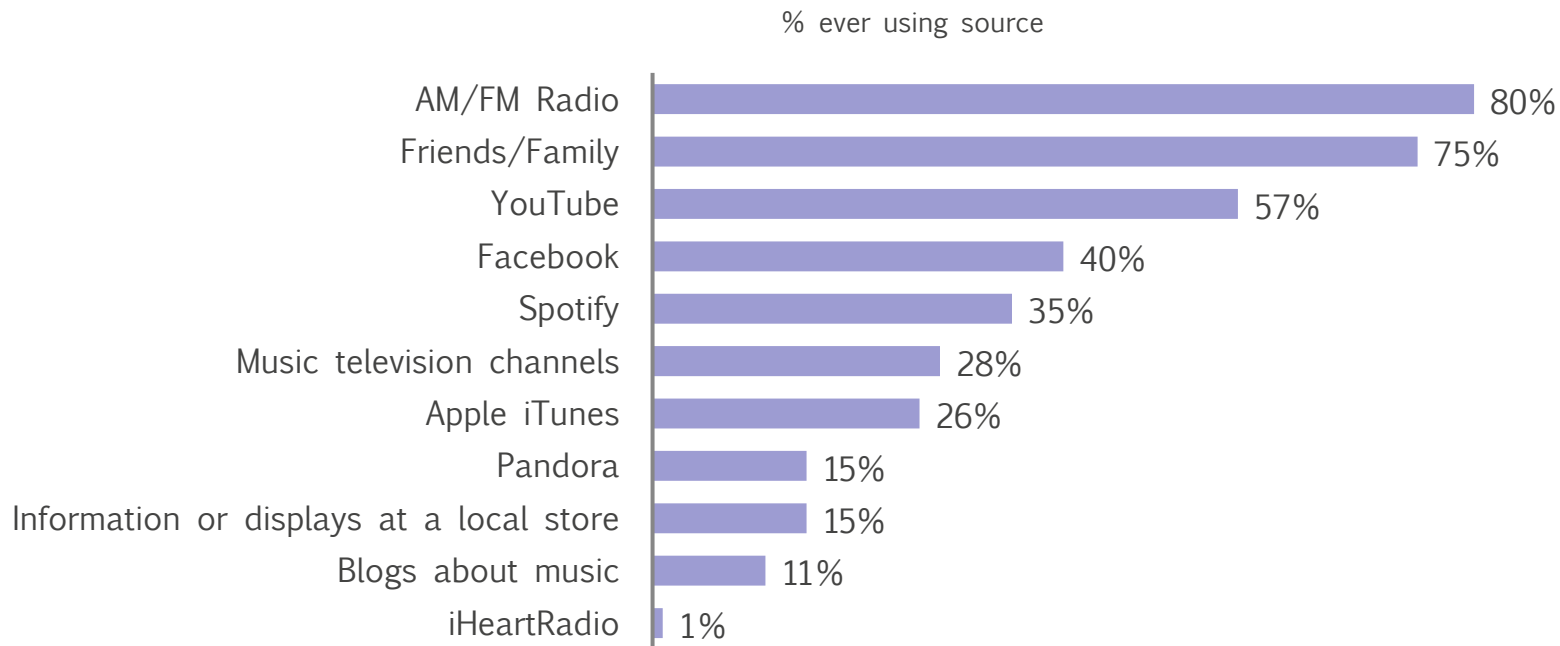


MUSIC DISCOVERY



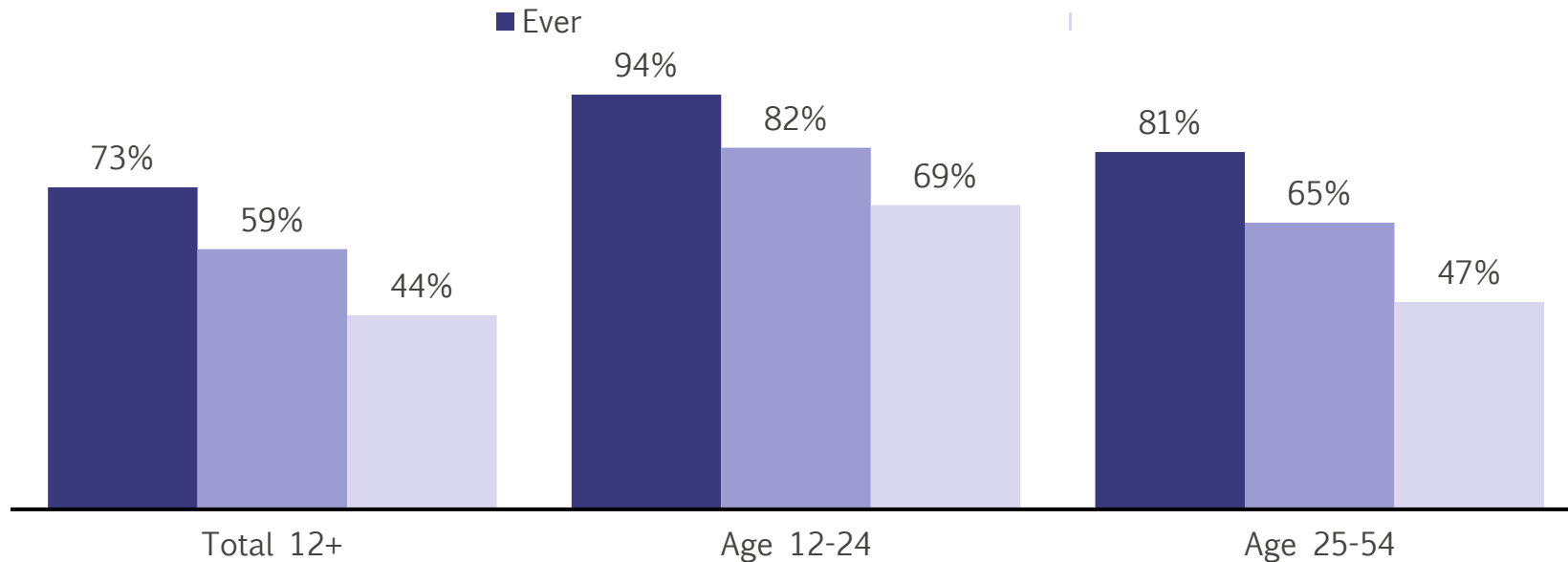
Sources Used for Keeping Up-to-Date with Music in Australia

Base: Those saying it is "Very Important" or "Somewhat Important" to keep up-to-date with music; 56%



YouTube Usage in Australia

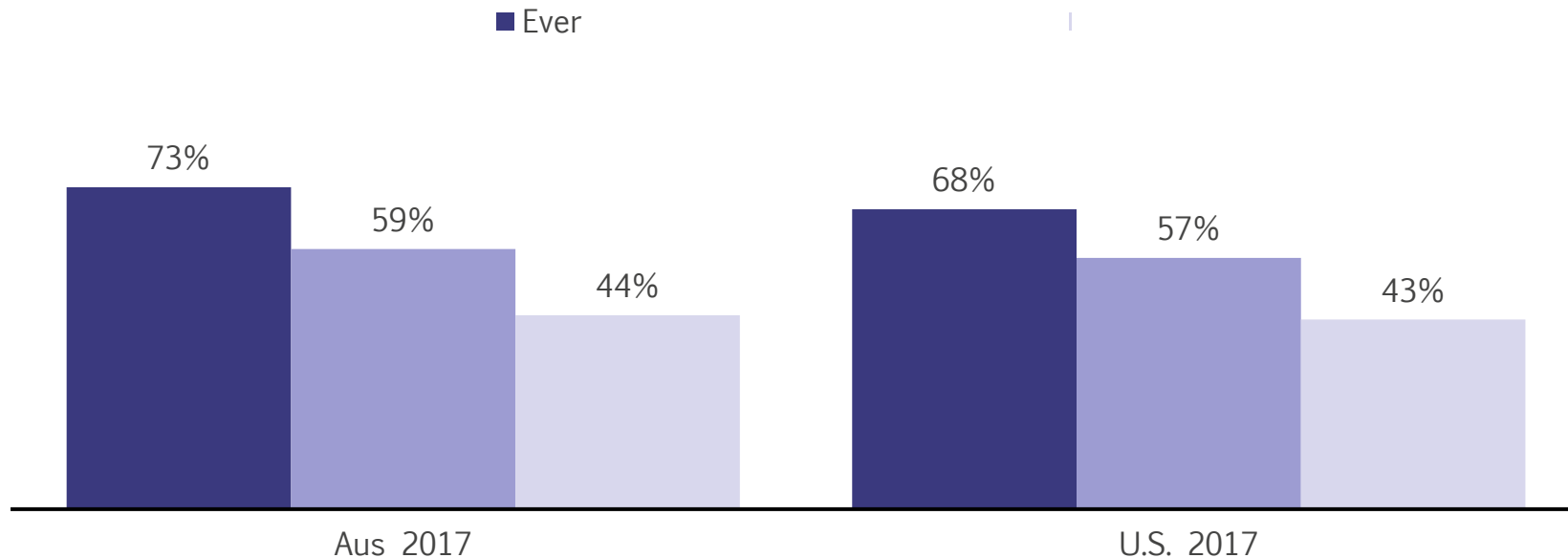
"Have you used YouTube to watch music videos or listen to music...?"



YouTube Usage

“Have you used YouTube to watch music videos or listen to music...?”

Base: Total Population 12+

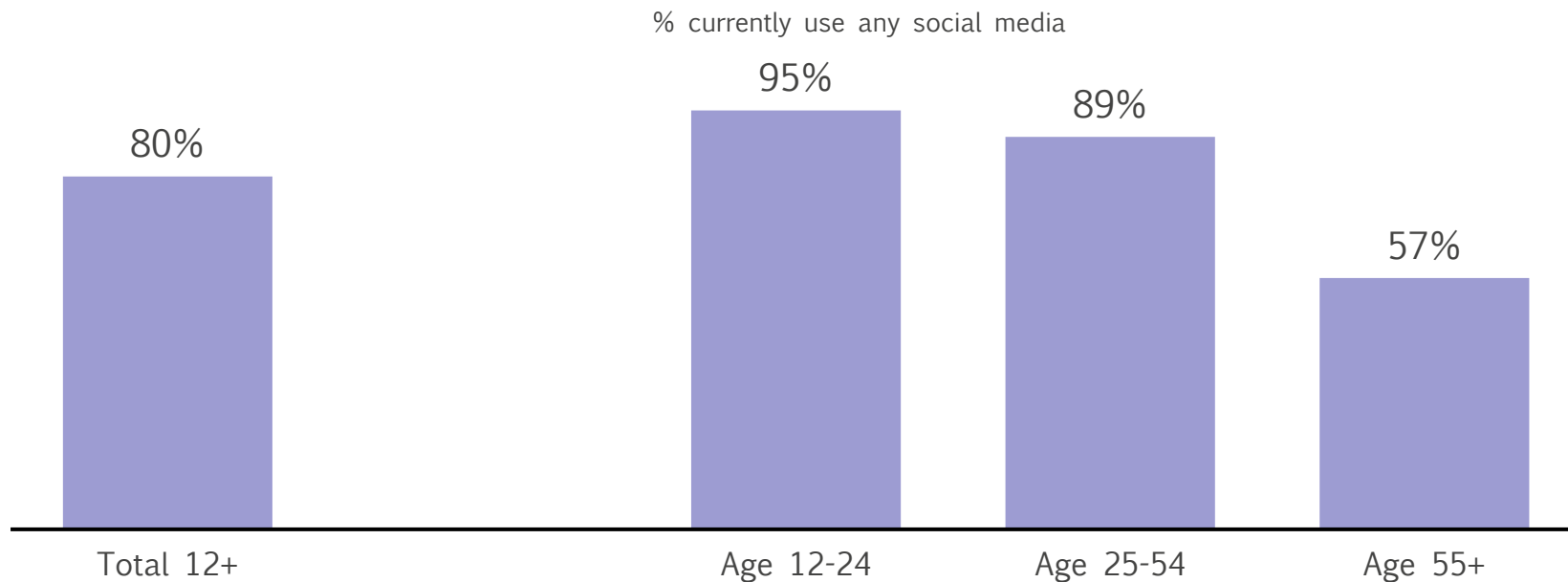




SOCIAL MEDIA



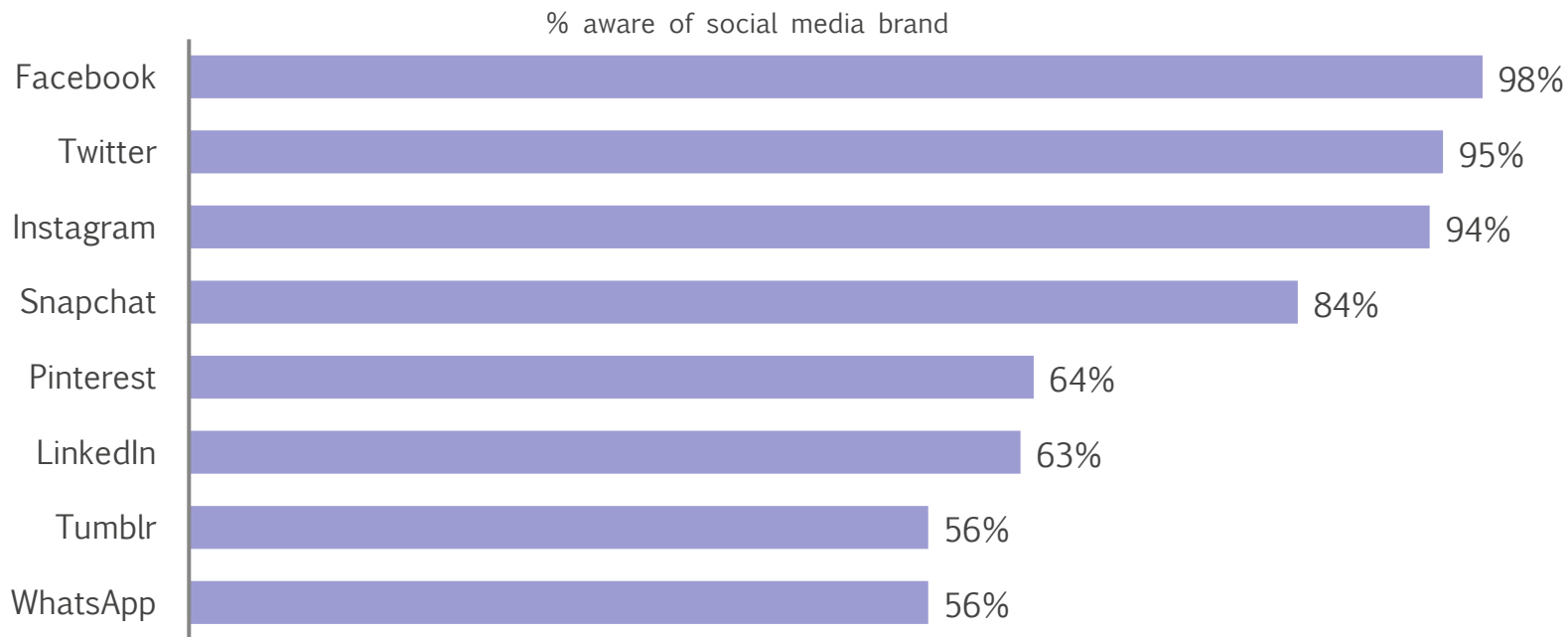
Social Media Usage in Australia





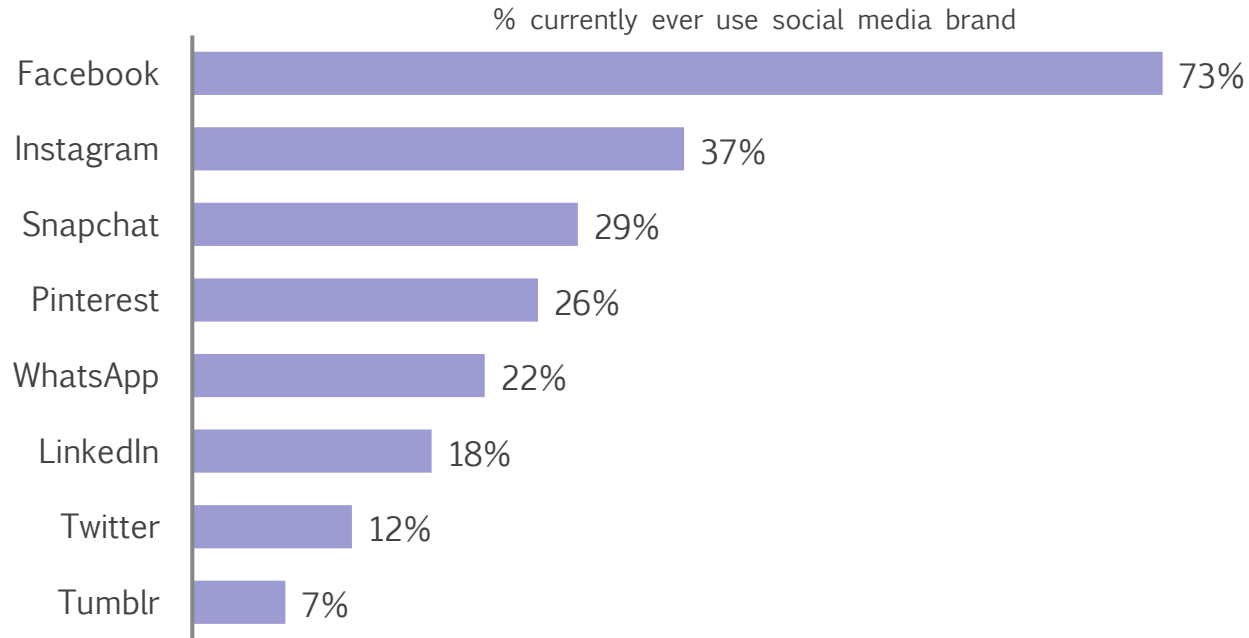
Social Media Brand Awareness in Australia

Base: Total Population 12+

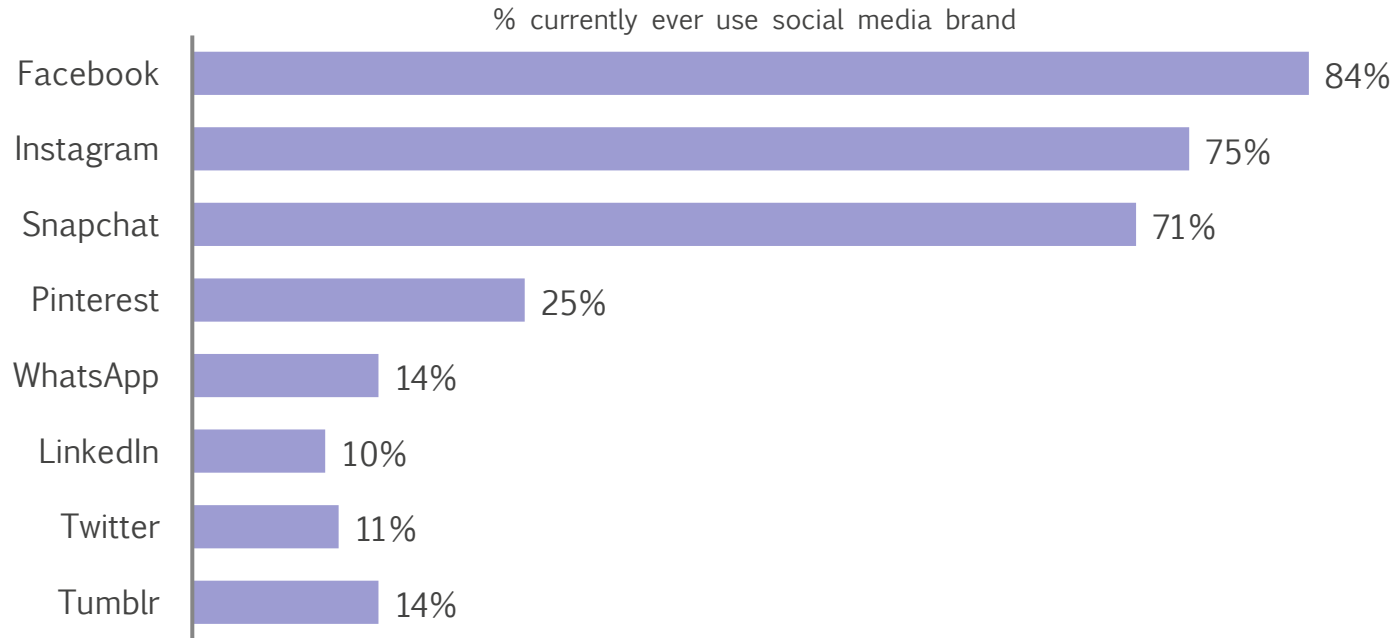


Social Media Brand Usage in Australia

Base: Total Population 12+

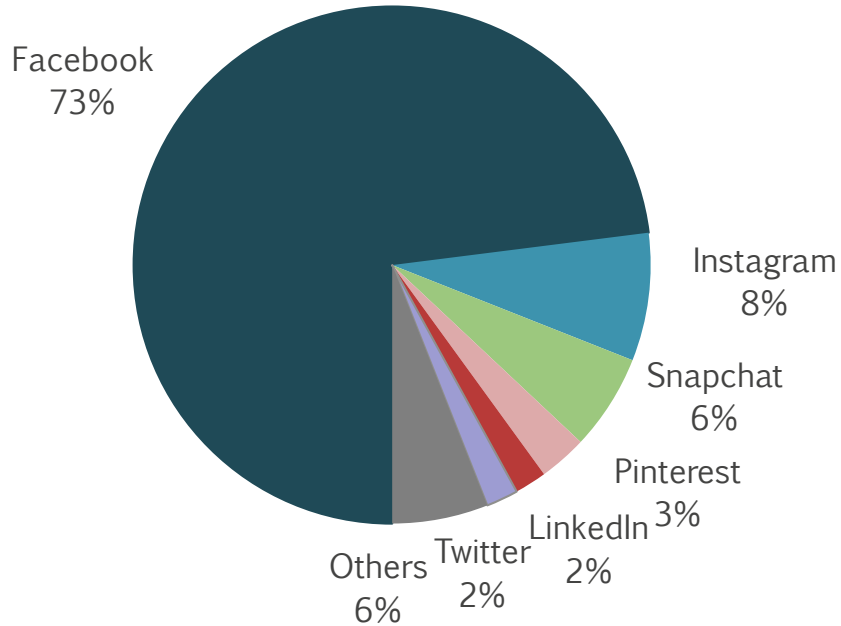


Social Media Brand Usage in Australia (Age 12-24)



Social Media Brand Used Most Often in Australia

Base: Currently use any social networking brands



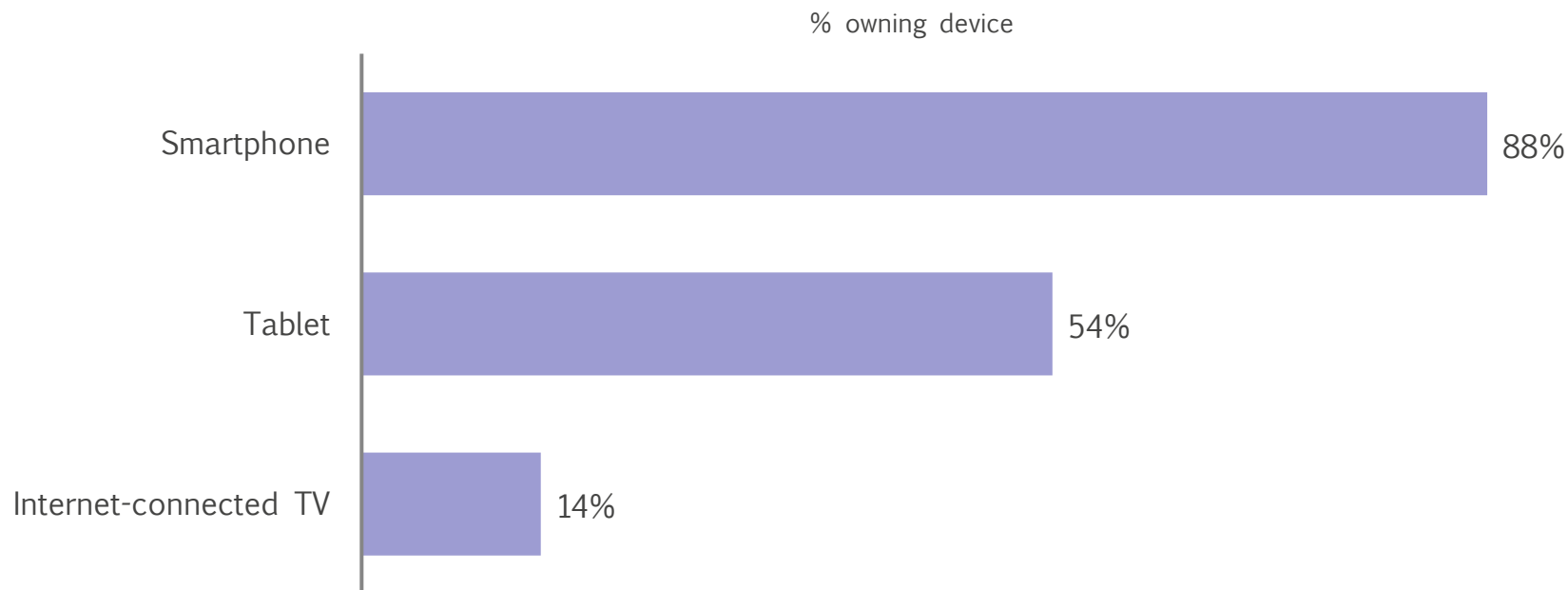


DEVICES & TECHNOLOGIES

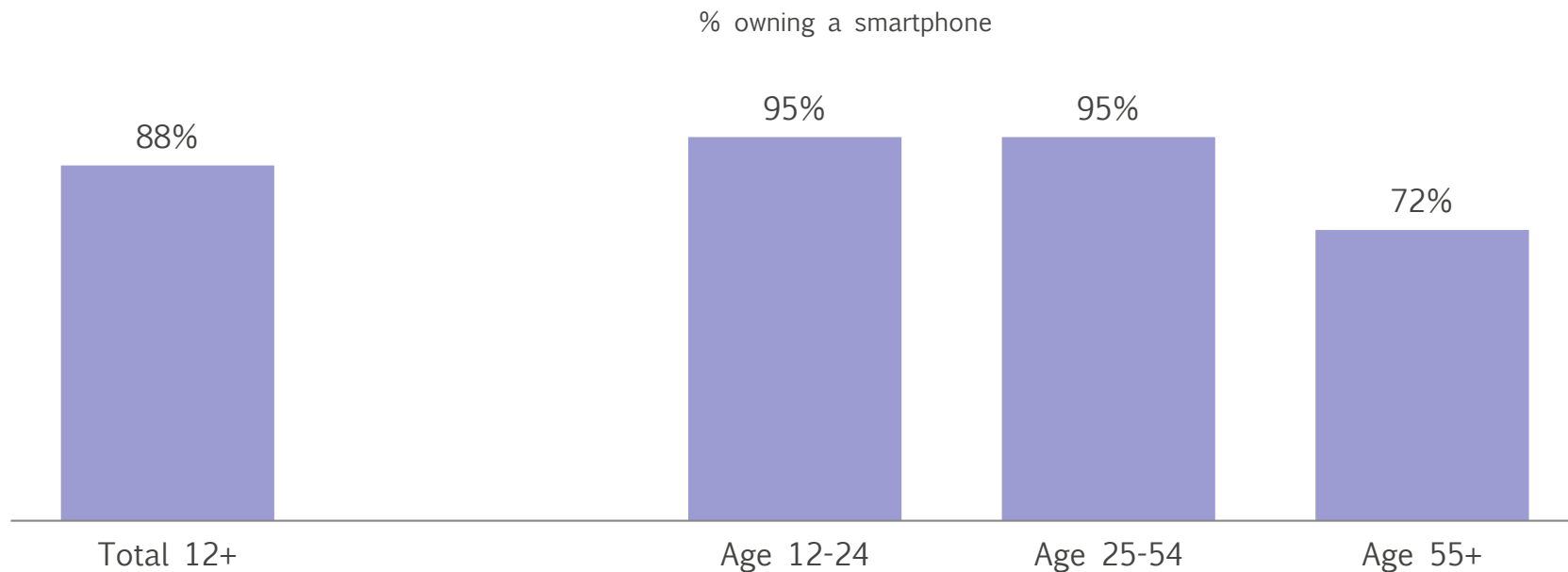


Device Ownership in Australia

Base: Total Population 12+



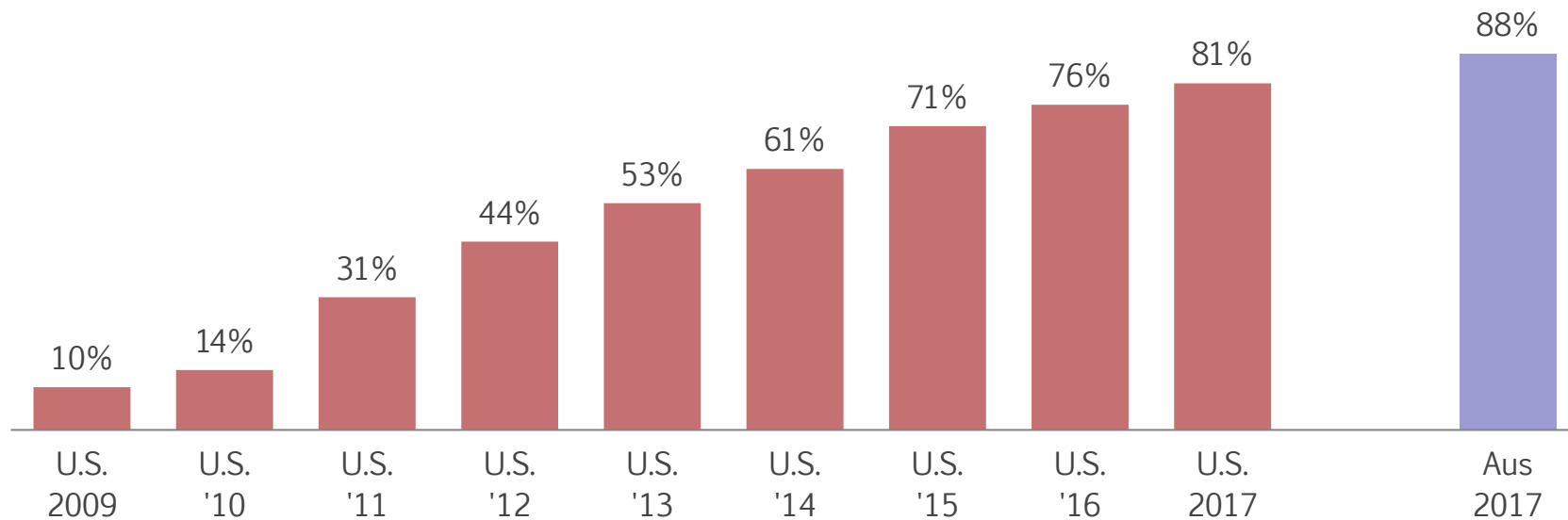
Smartphone Ownership in Australia



Smartphone Ownership

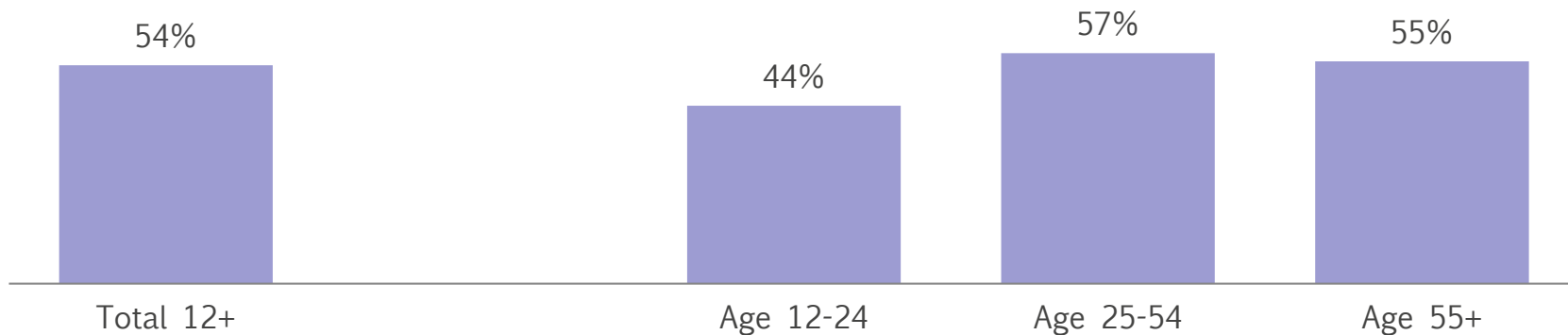
Base: Total Population 12+

% owning a smartphone



Tablet Ownership in Australia

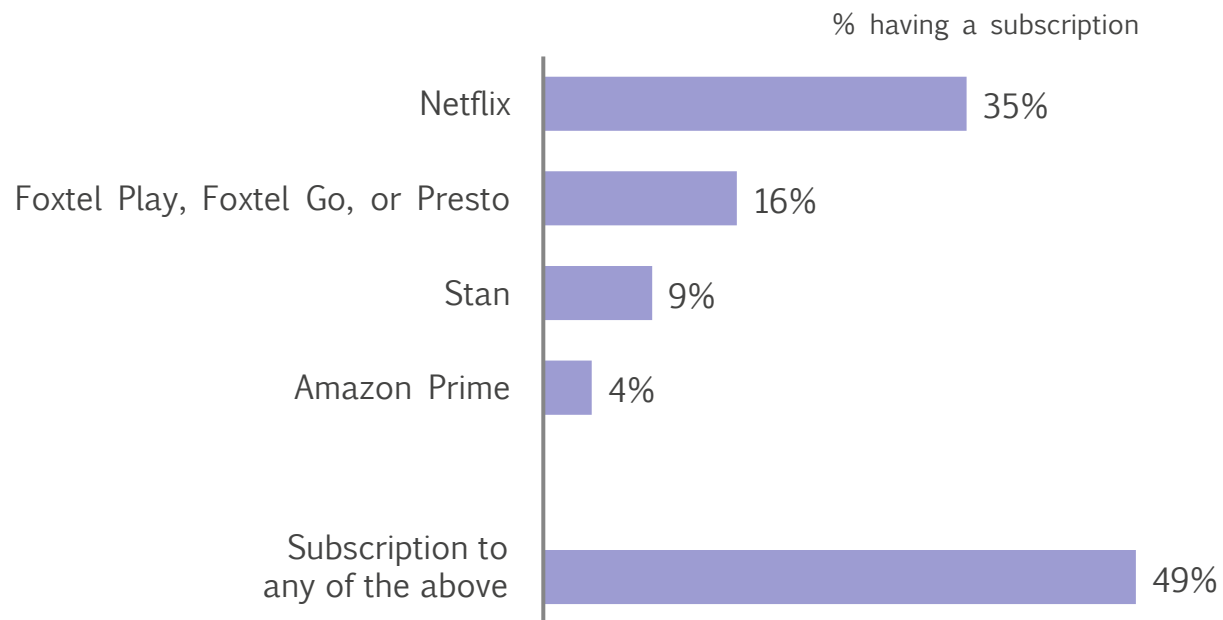
% owning a tablet





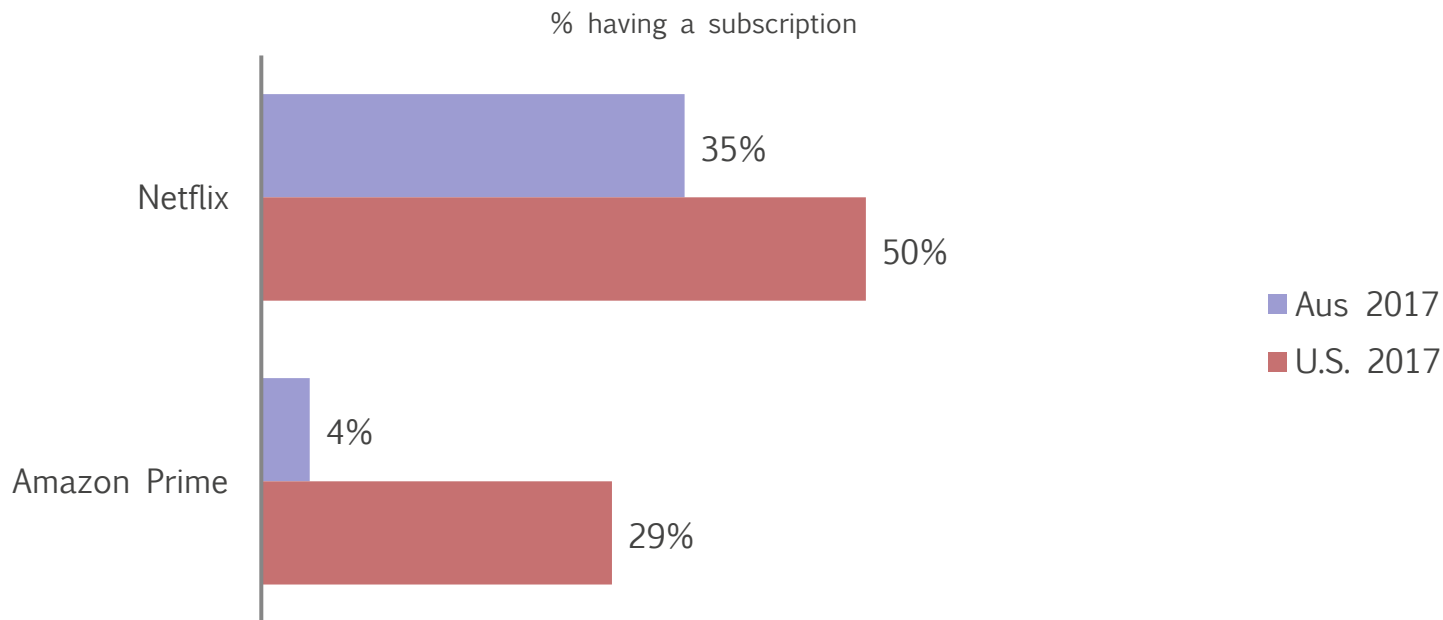
On-Demand Video Service Subscription in Australia

Base: Total Population 12+



On-Demand Video Service Subscription

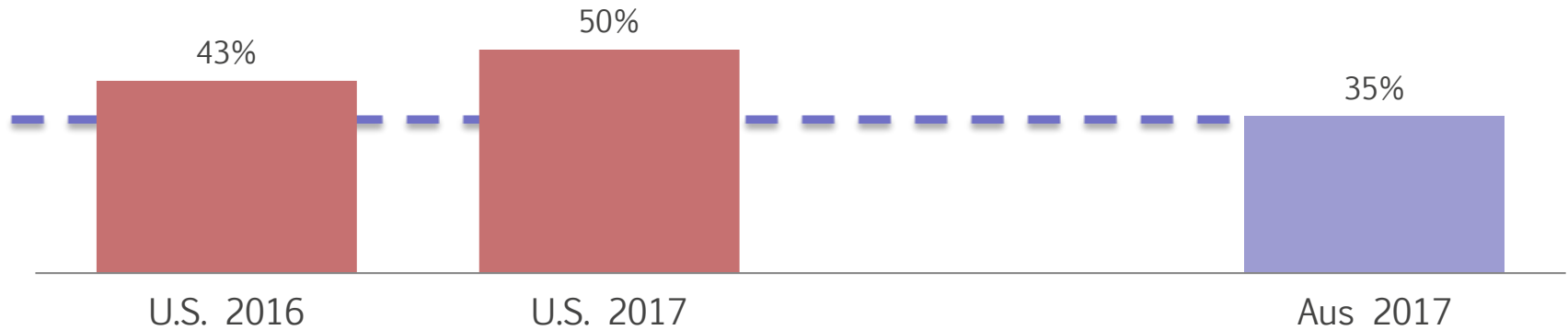
Base: Total Population 12+



Netflix Subscription

Base: Total Population 12+

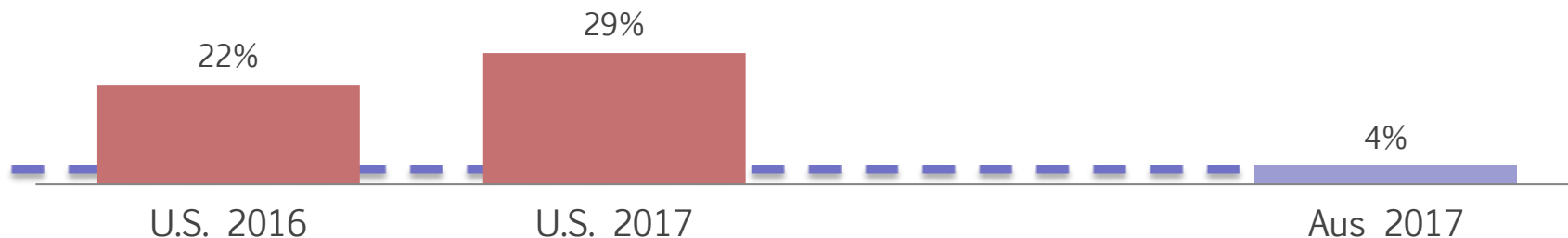
% having a subscription



Amazon Prime Subscription

Base: Total Population 12+

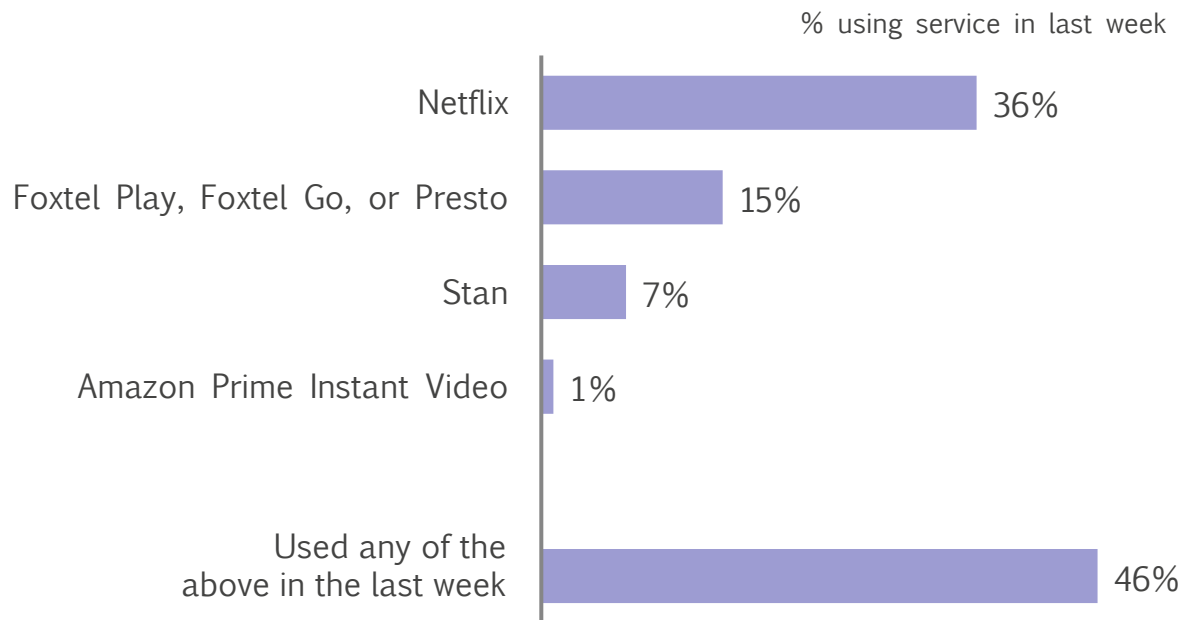
% having a subscription





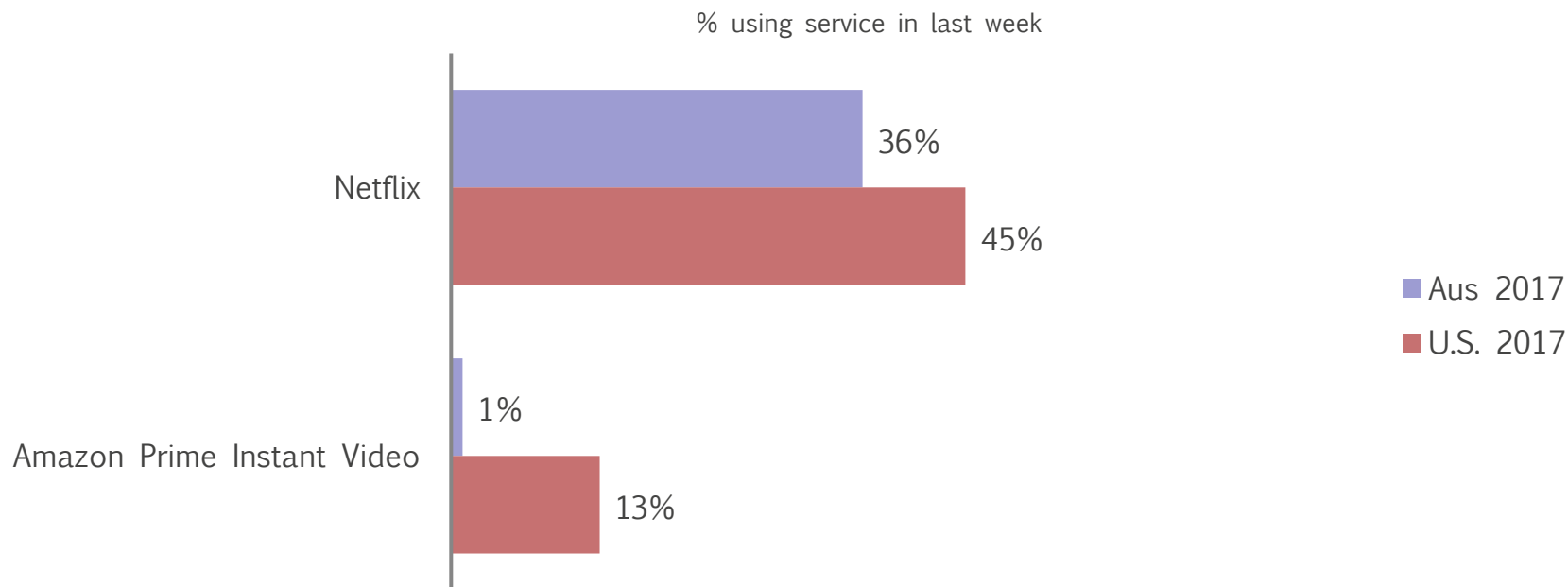
Used On-Demand Video Service in Last Week in Australia

Base: Total Population 12+



Used On-Demand Video Service in Last Week

Base: Total Population 12+



Key Takeaways

- While broadcast radio is resilient and strong in the U.S. – the medium performs yet more strongly in Australia
- Australians use fewer audio options in their cars so radio is stronger there as well
- Online “pureplays” are not the same factor in Australia

Key Takeaways

- The concept of ‘Podcasting’ is better known in Australia than in the U.S. but usage is lower
- 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 (especially Facebook)
 - YouTube
 - Netflix