



# 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”

# 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



# RADIO & RADIO SIMULCAST



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

Base: Total Population 12+

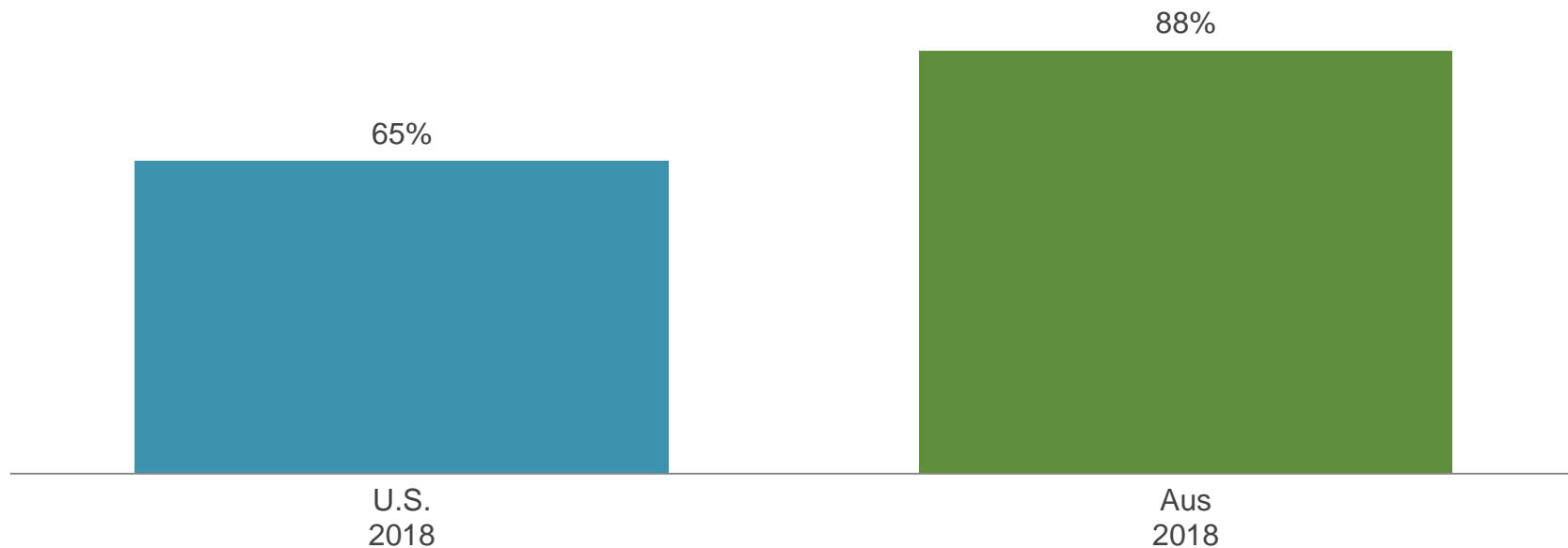


*\*AM/FM Radio includes both "over-the-air" and online. 2017 figures do not include DAB+ listening.*



# Listening to AM/FM Radio in the Last Week

Base: Total Population 12+



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

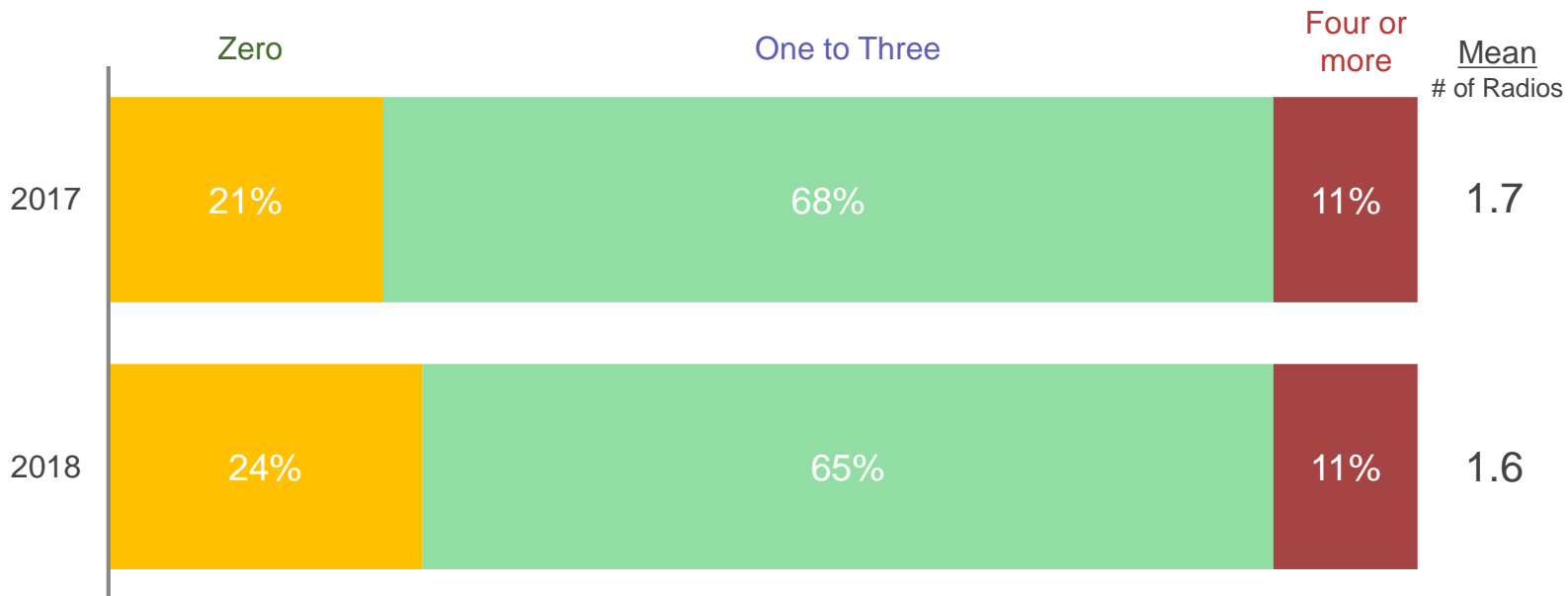


Sponsored by:



# Number of Radios Owned in Homes in Australia

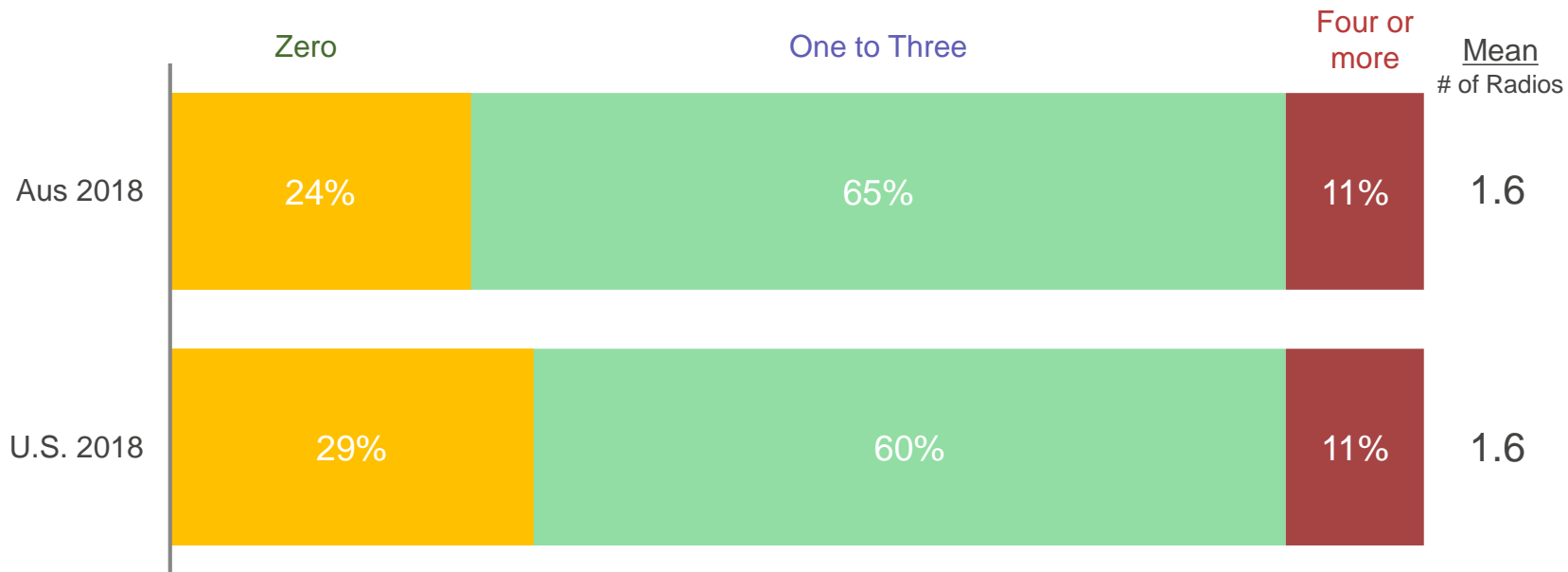
Base: Total Population 12+



\*2017 figures do not include DAB+ radios

# Number of Radios Owned in Home

Base: Total Population 12+

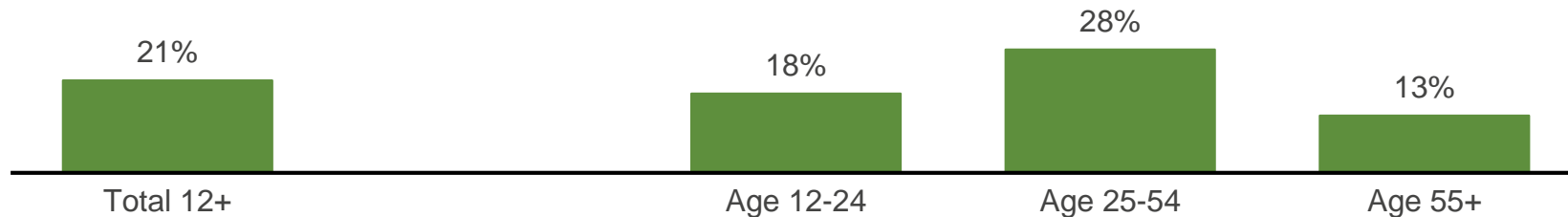


*\*2017 figures do not include DAB+ radios*



# Radio Listening on Other Devices in Australia

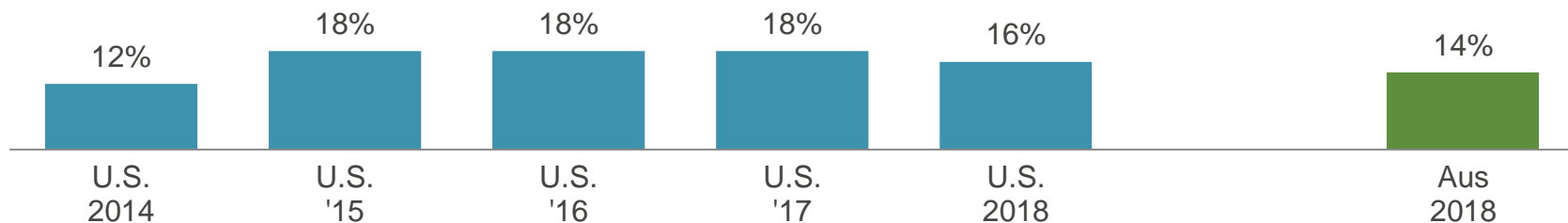
*“Do you ever use a mobile phone, computer, or TV to listen to radio while at home?”*





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

Base: Total Population 12+



Sponsored by:





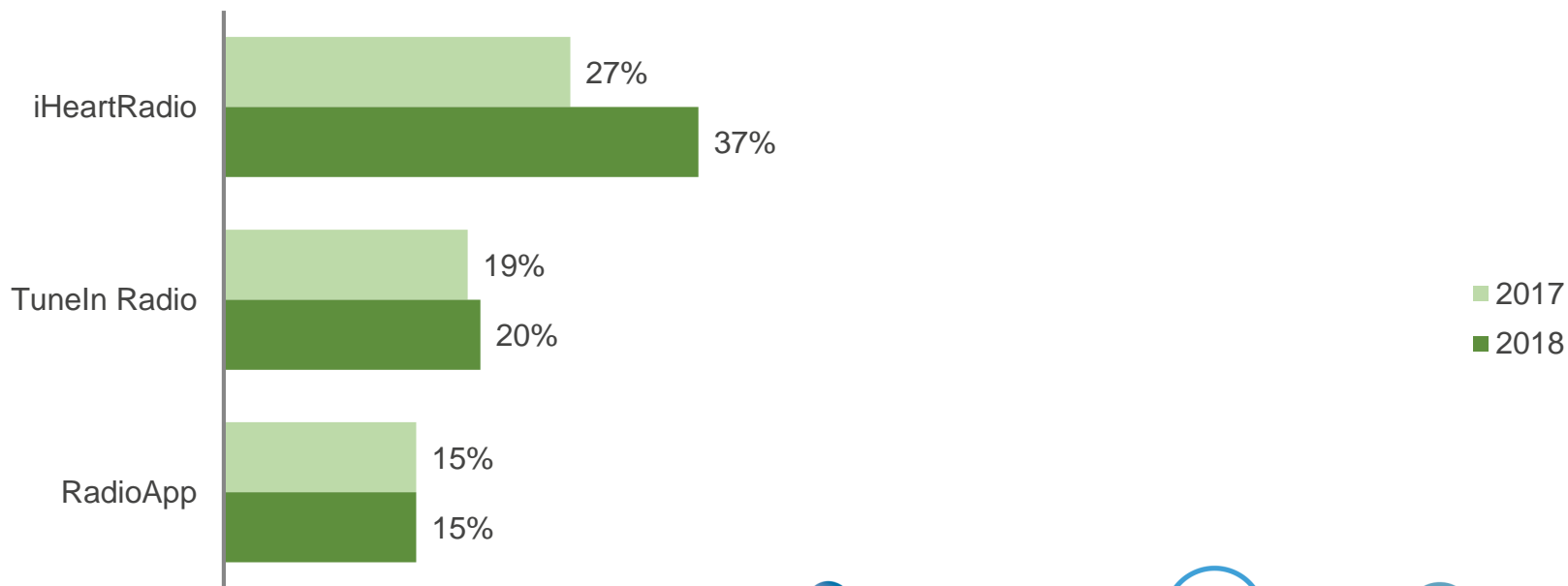
# AUDIO AGGREGATORS





# Audio Aggregator Brand Awareness in Australia

Base: Total Population 12+

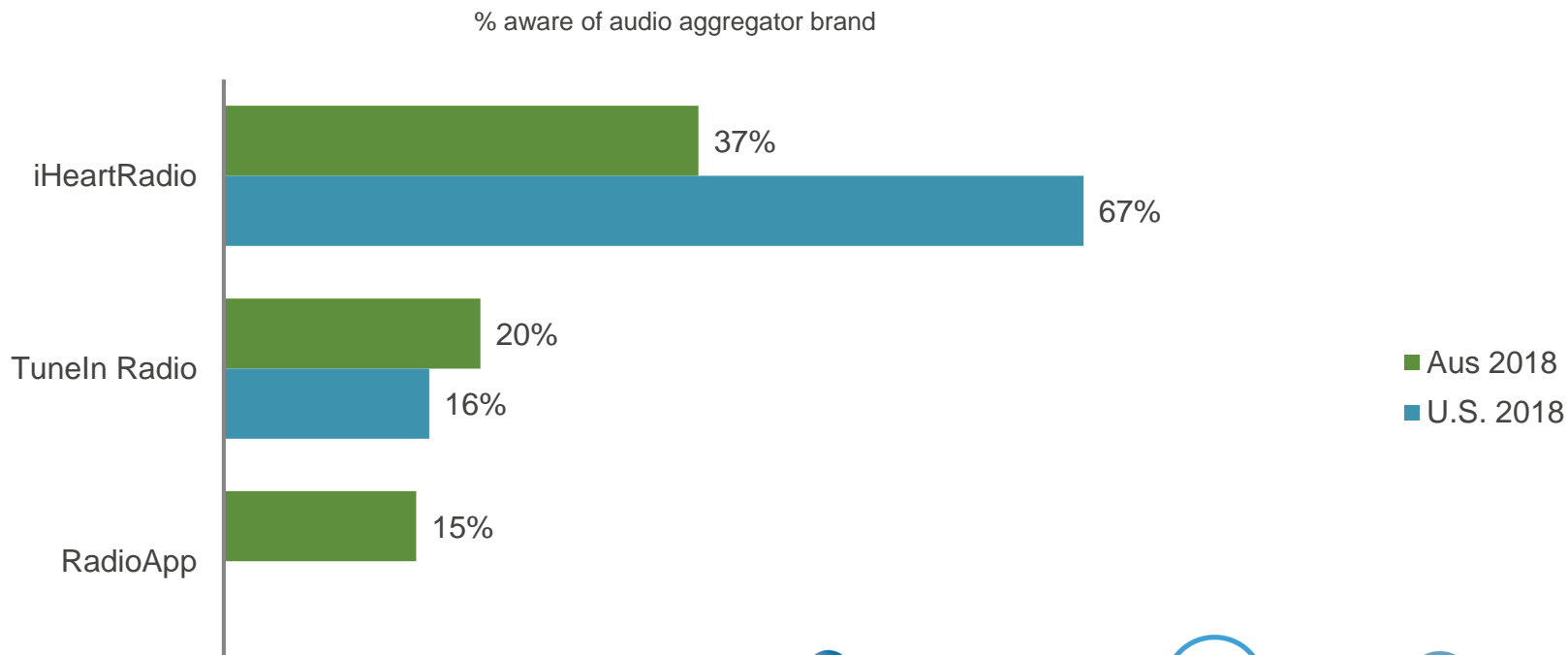


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# Audio Aggregator Brand Awareness

Base: Total Population 12+





# Audio Aggregators: Monthly Listening in Australia

Base: Total Population 12+



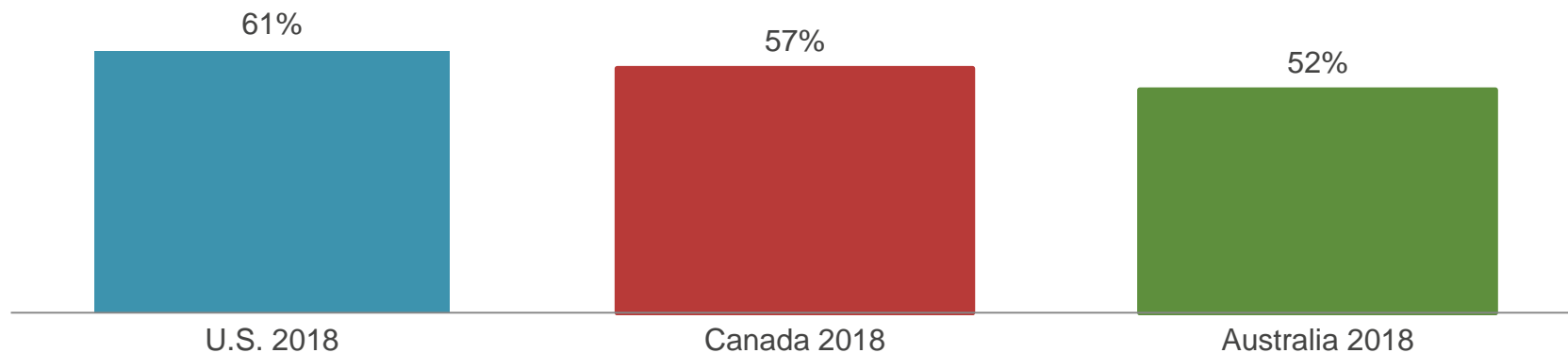


# ONLINE AUDIO STREAMING SERVICES



# Monthly Online Audio Listening

Base: Total Population 18+

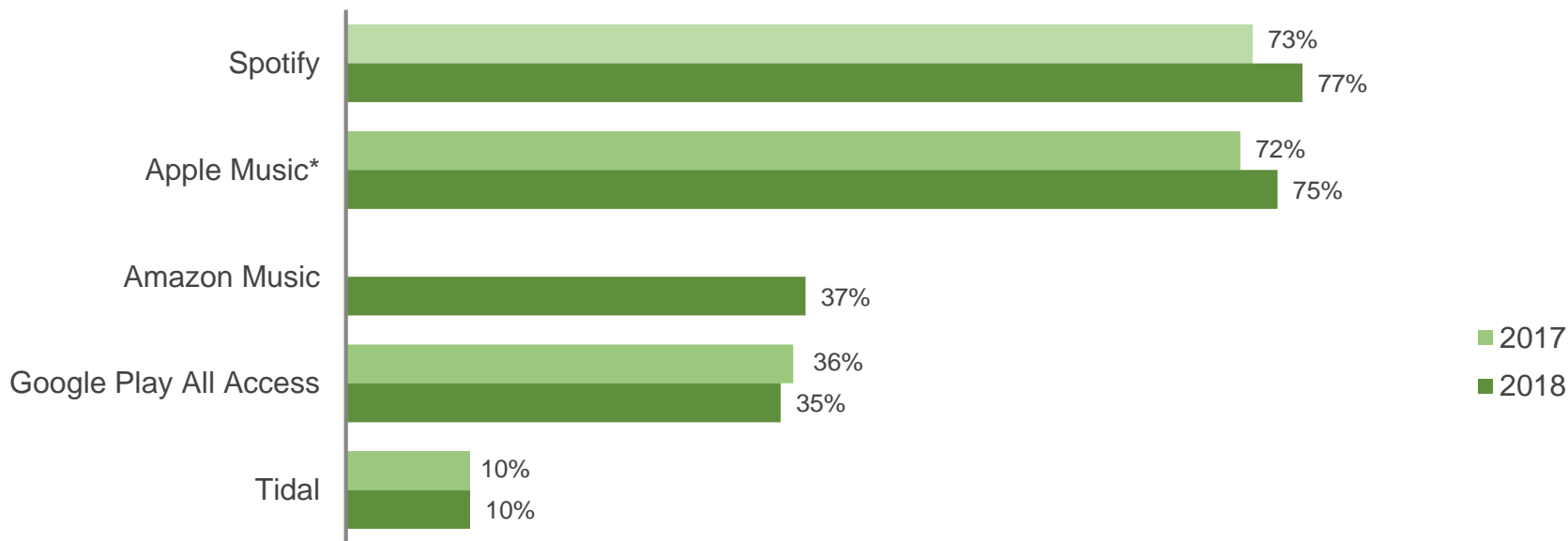


% listening to Online Audio in last month



# Awareness of Online Audio Streaming Services in Australia

Base: Total Population 12+

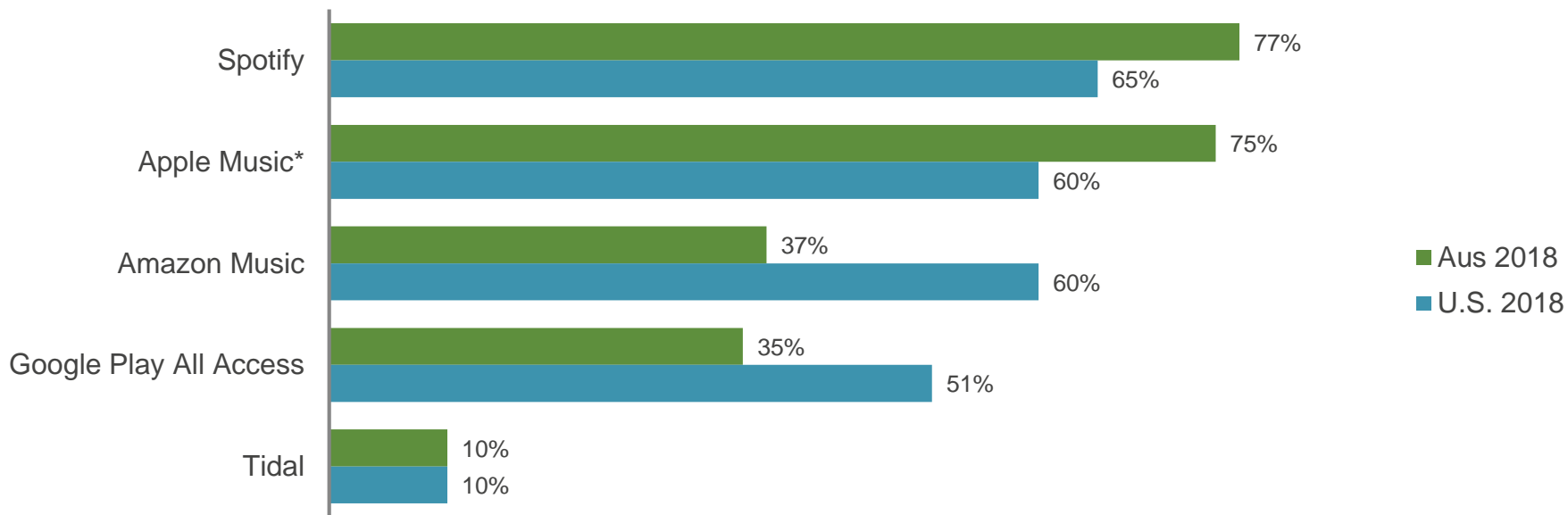


\*Asked as "Apple Music, the paid music subscription from Apple"



# Awareness of Online Audio Streaming Services

Base: Total Population 12+



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

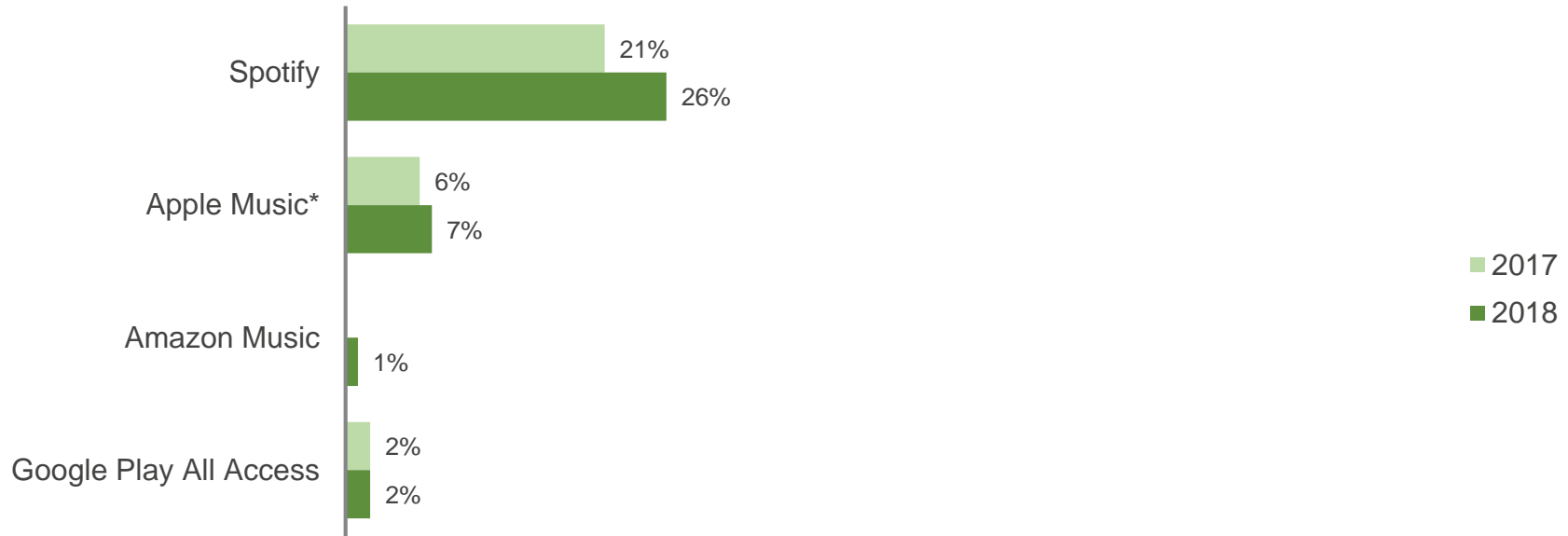


Sponsored by:



# 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"

# Weekly YouTube Music Usage in Australia

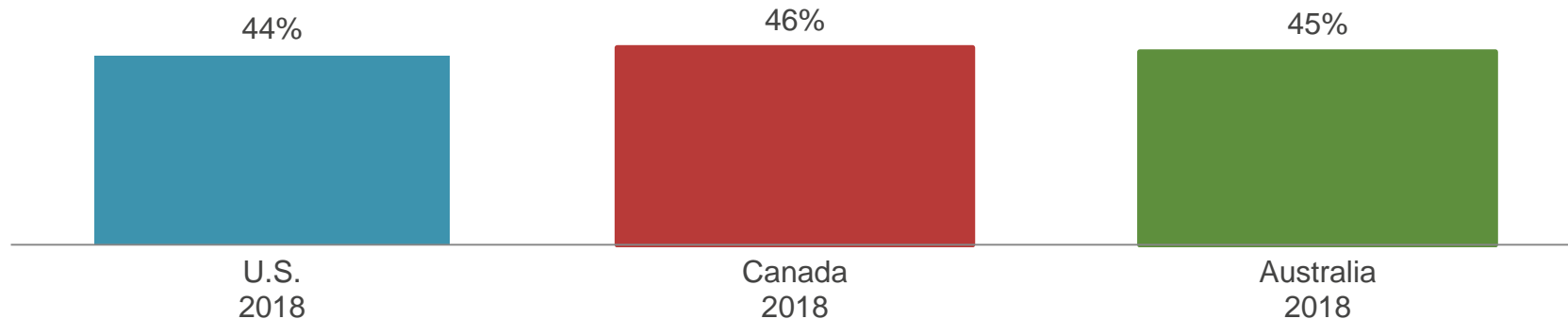
Base: Total Population 12+



# Weekly YouTube Music Usage

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

Base: Total Population 18+



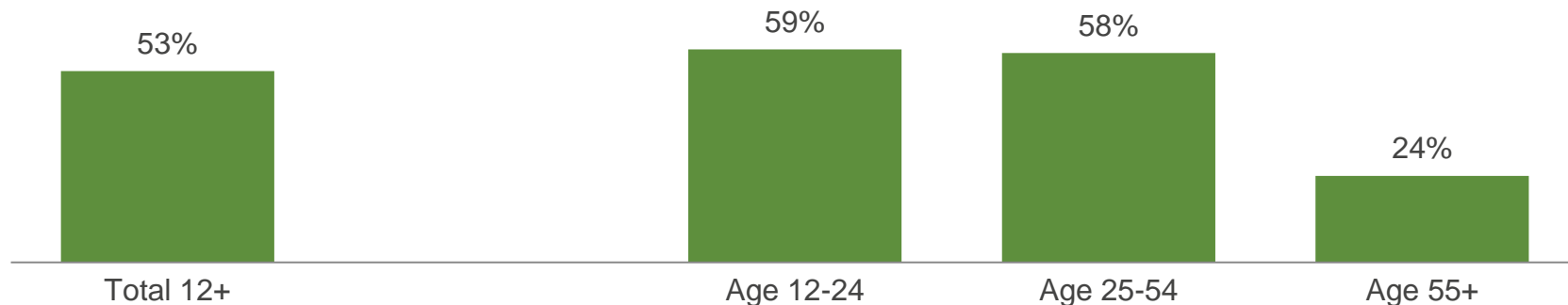
% used YouTube for music in last week

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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



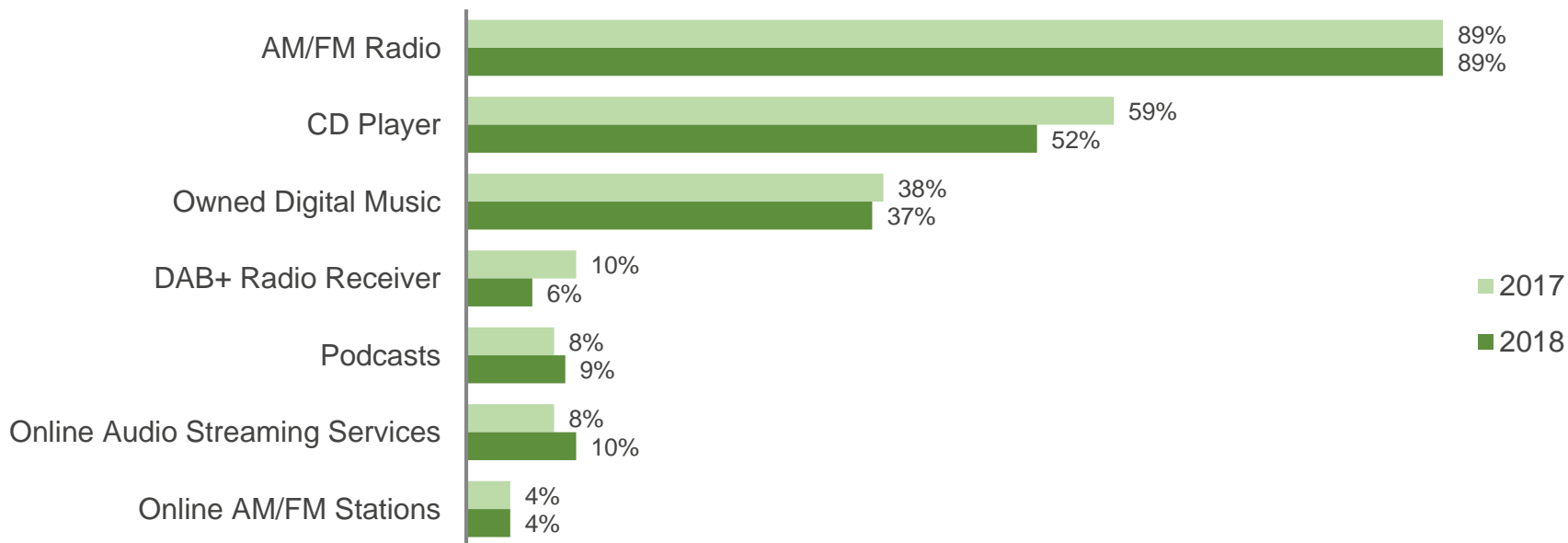


# IN-CAR AUDIO



# Audio Sources Used in Car in Australia

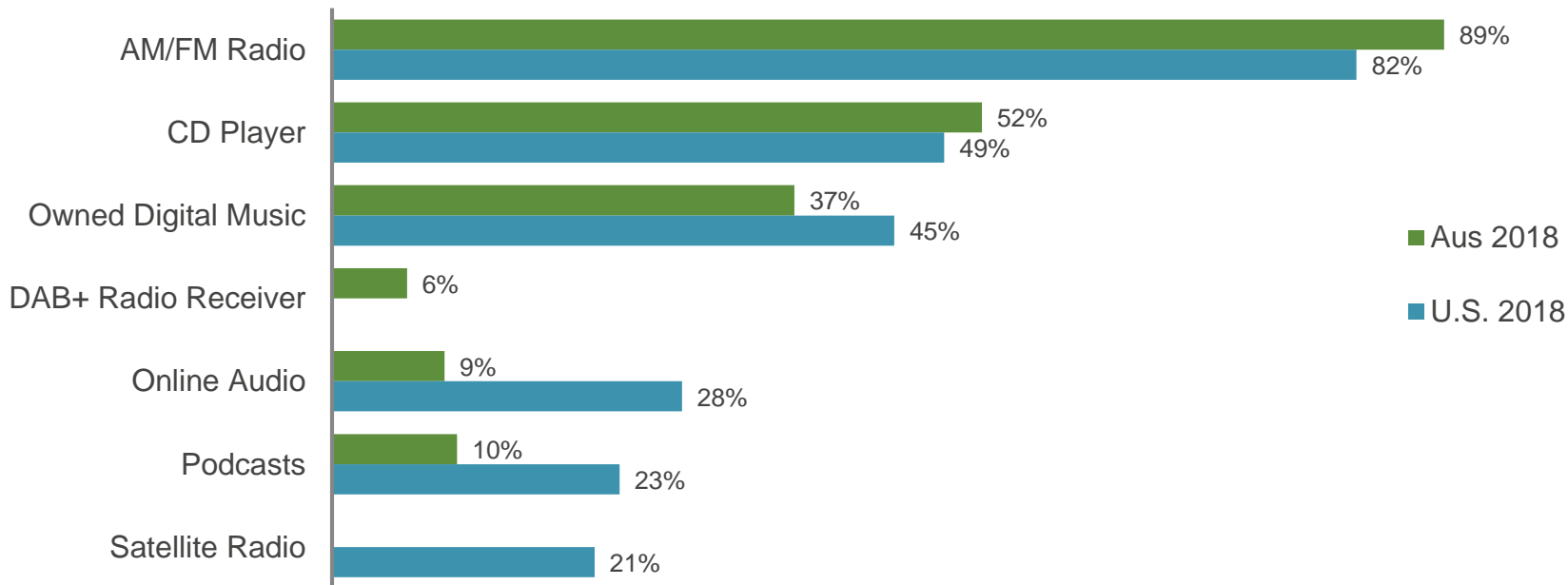
Base: Age 18+ and has driven/ridden in car in last month (89% of total)





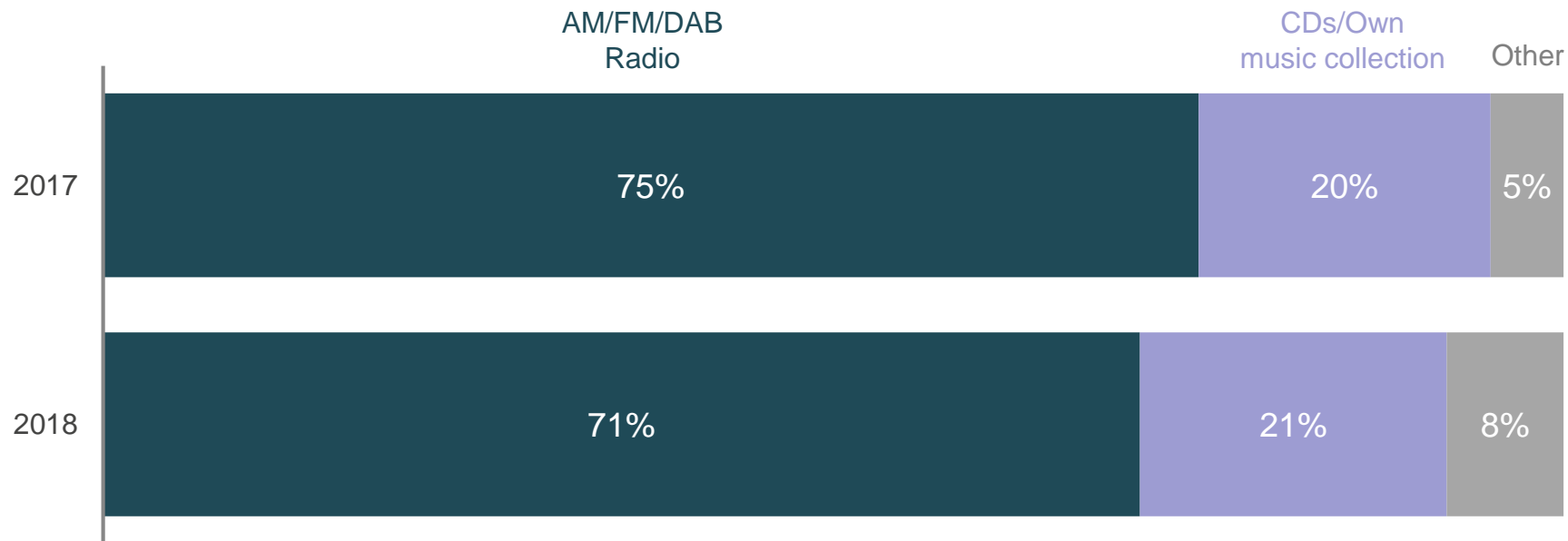
# Audio Sources Used in Car

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



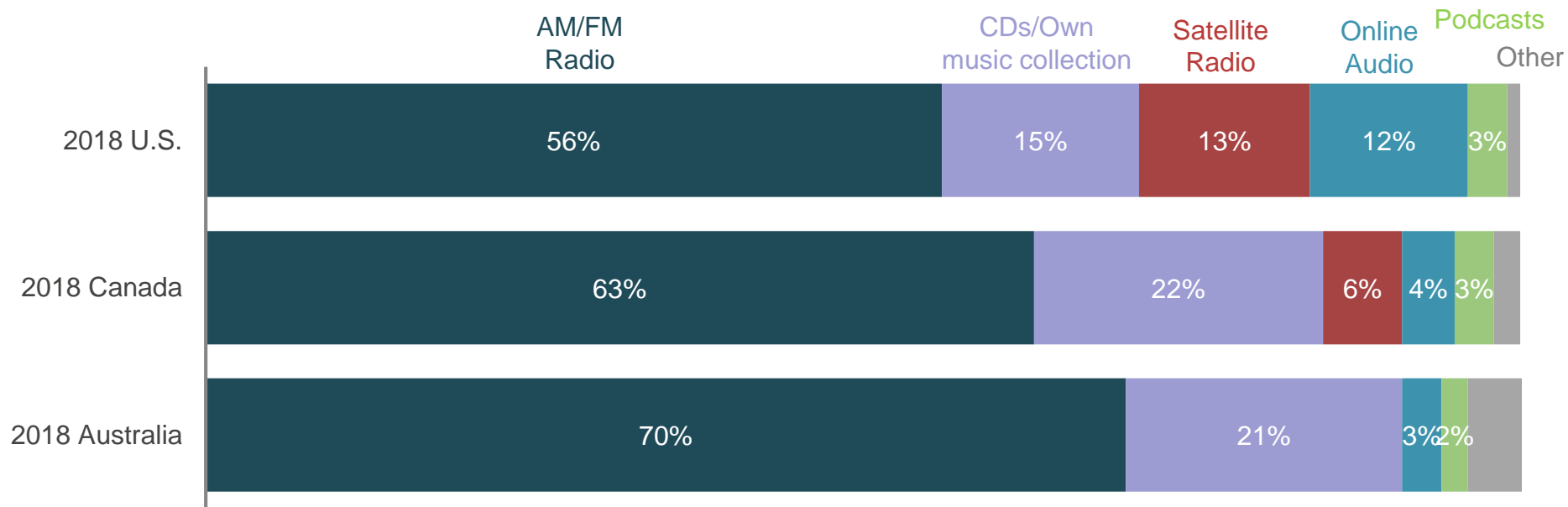
# Audio Source Used Most Often in Car in Australia

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



# 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

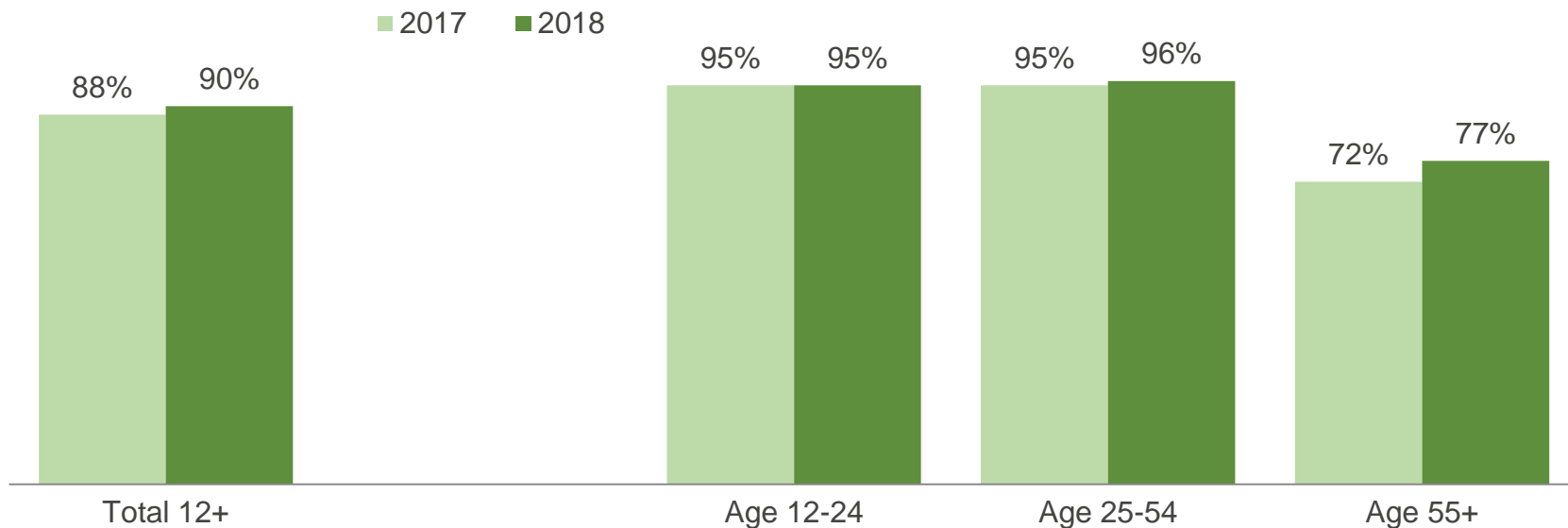




# DEVICES & TECHNOLOGIES

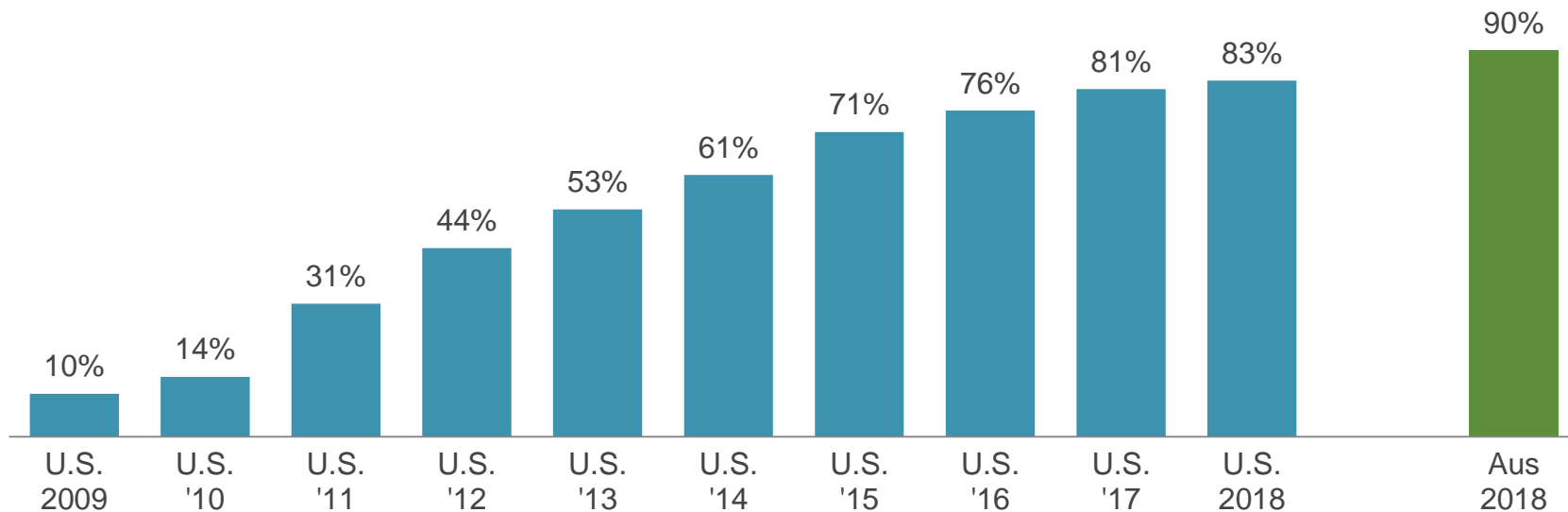


# Smartphone Ownership in Australia



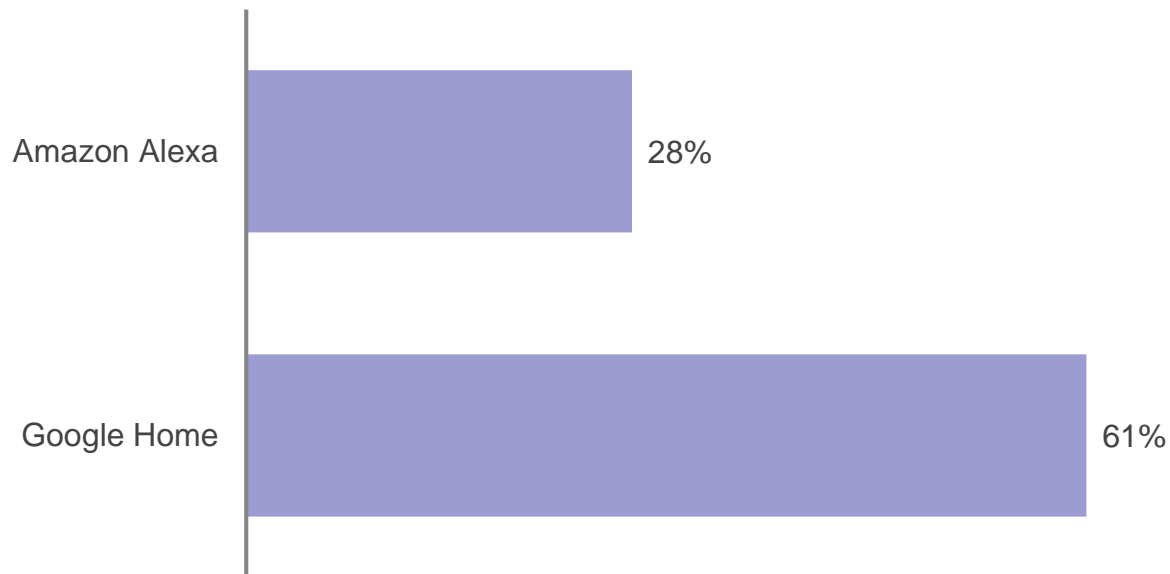
# Smartphone Ownership

Base: Total Population 12+



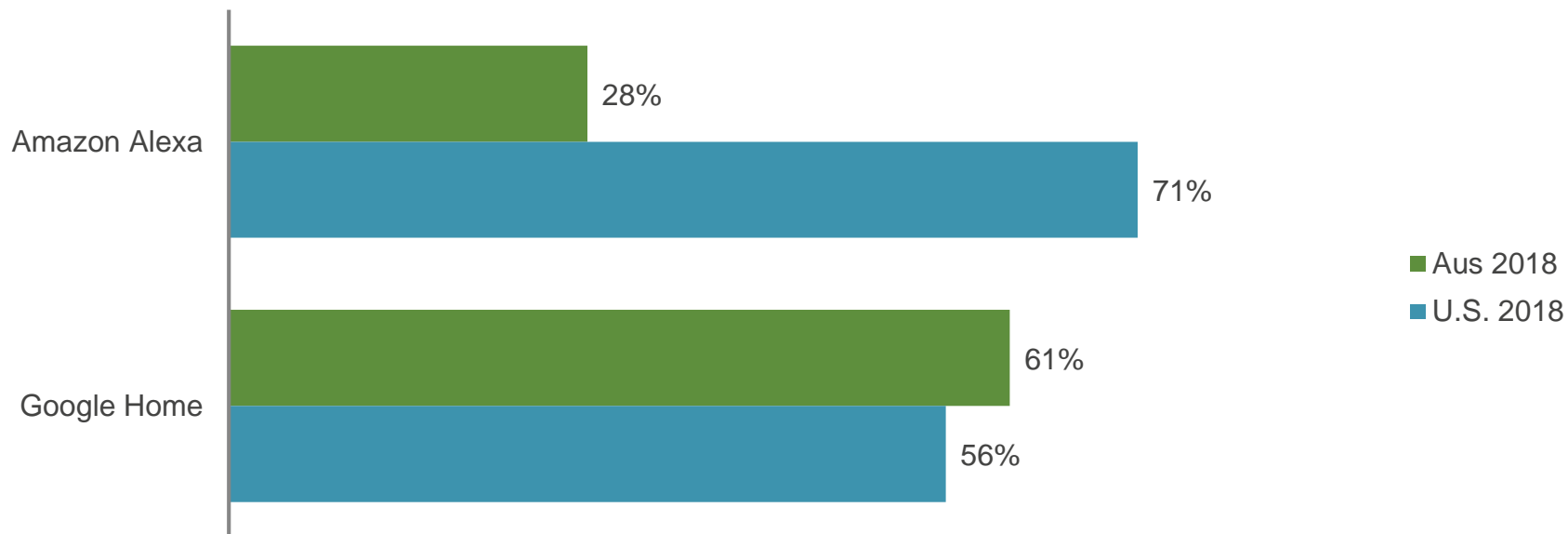
# Smart Speaker Awareness in Australia

Base: Total Population 12+



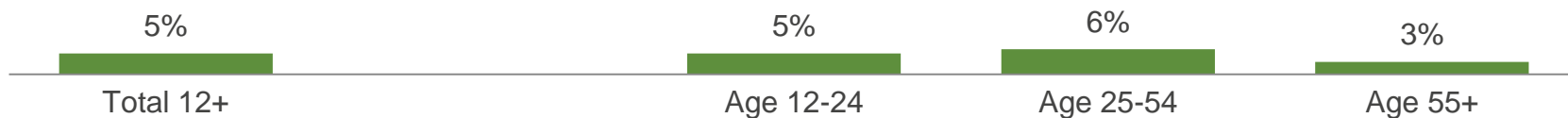
# Smart Speaker Awareness

Base: Total Population 12+





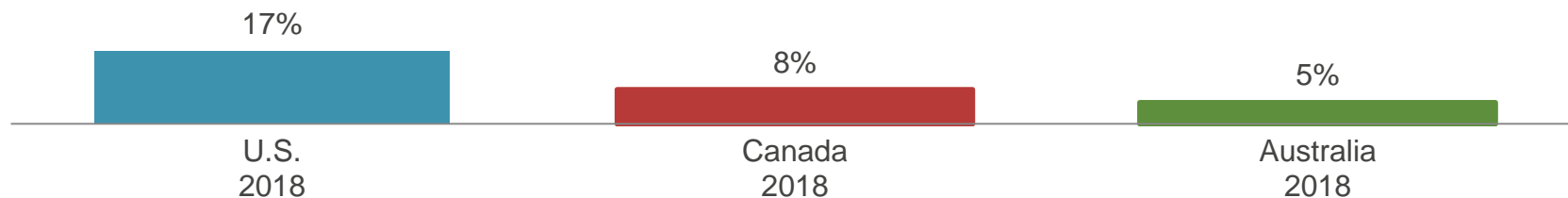
# Smart Speaker Ownership in Australia



# Smart Speaker Ownership

Base: Total Population 18+

% owning a Smart Speaker

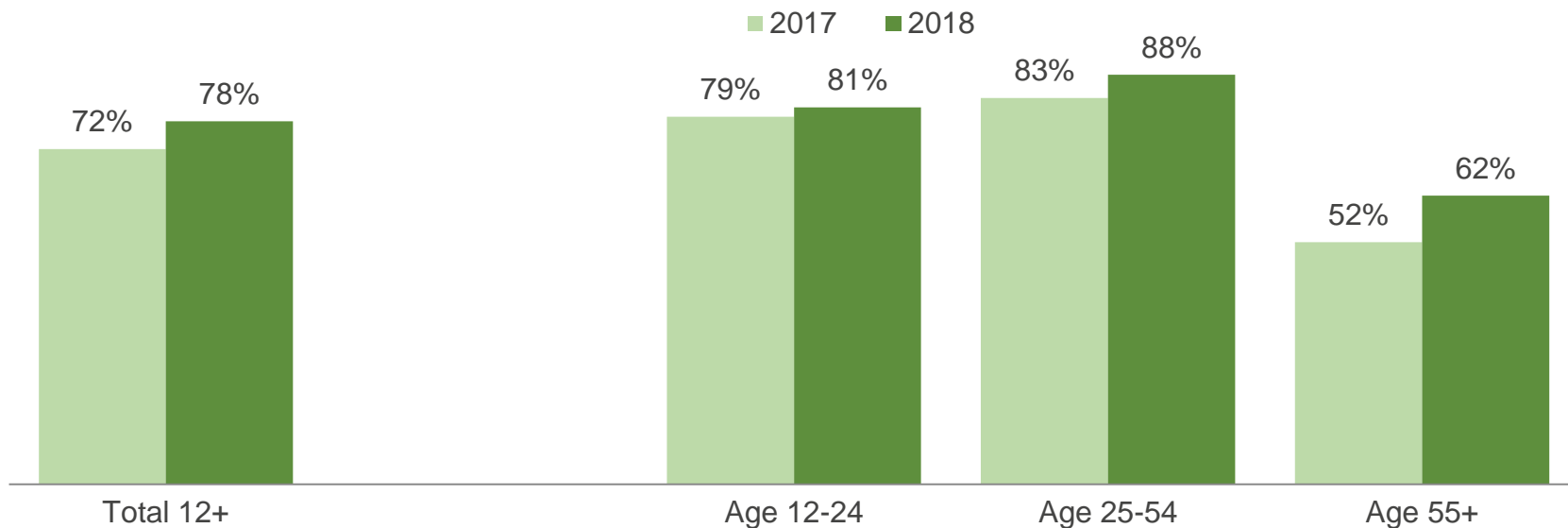




# PODCASTING

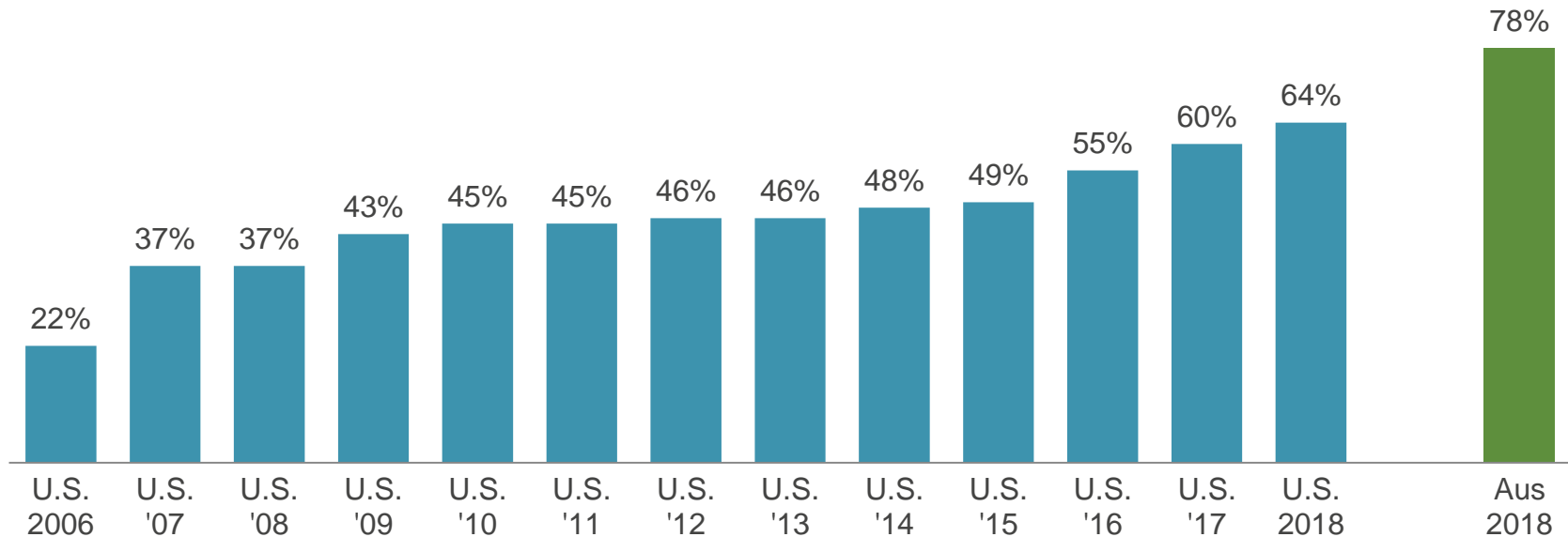


# Familiar with the term “Podcasting” in Australia

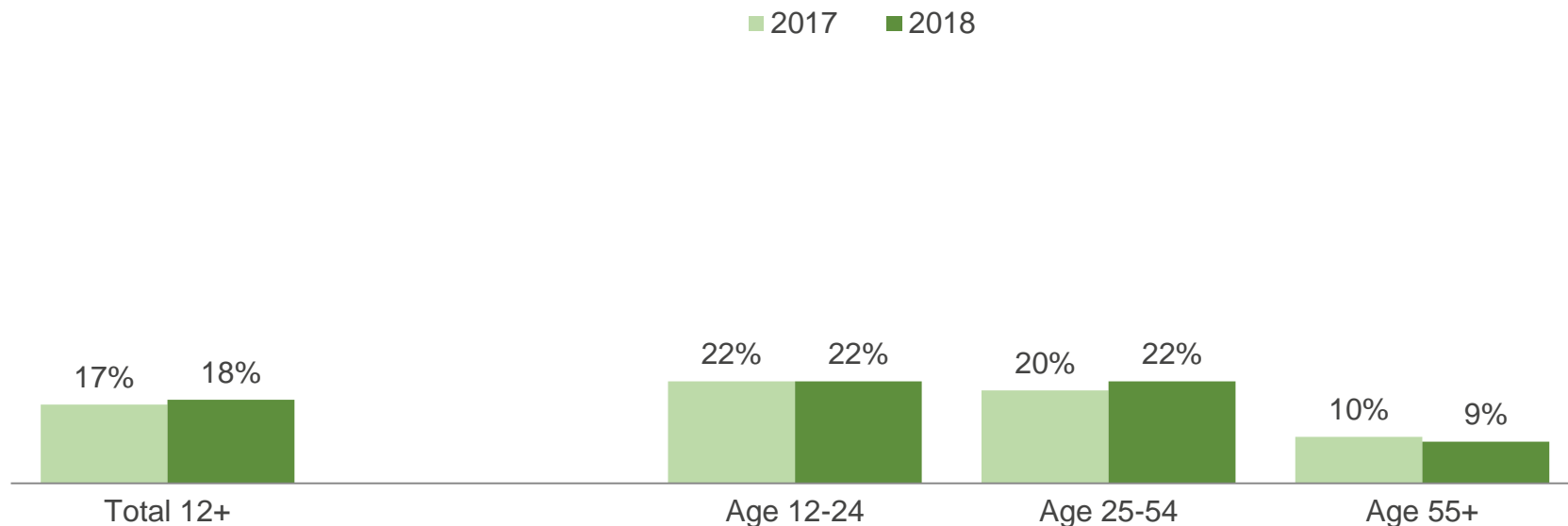


# Familiar with the term “Podcasting”

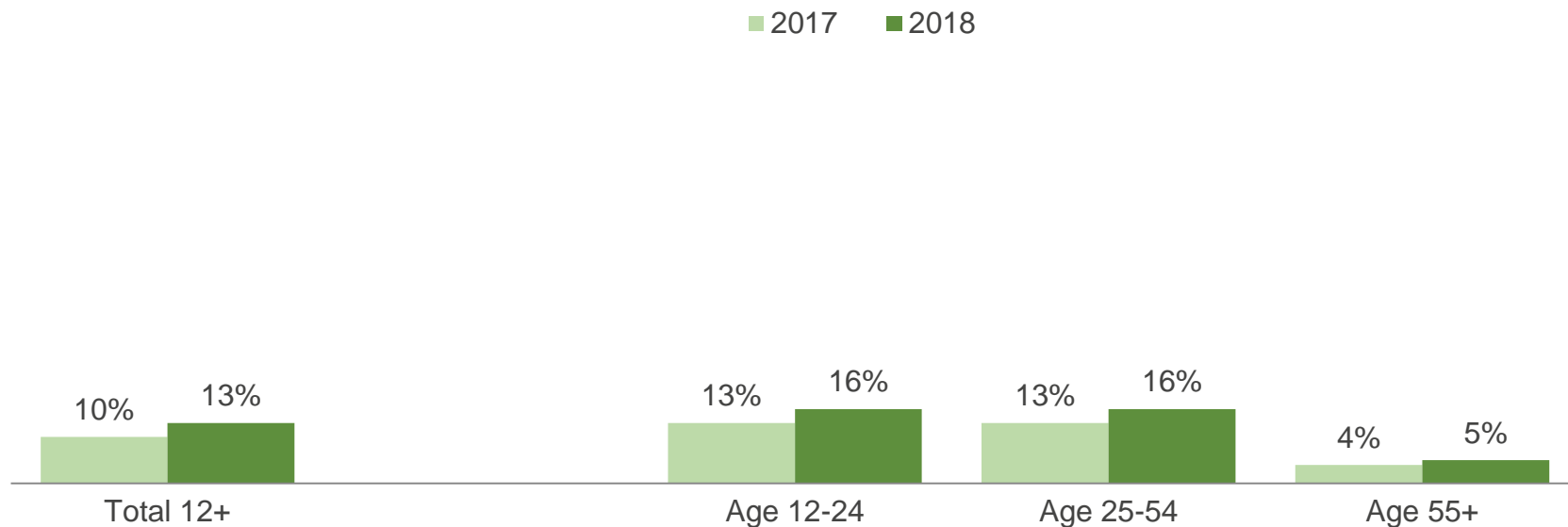
Base: Total Population 12+



# Monthly Podcast Listening in Australia



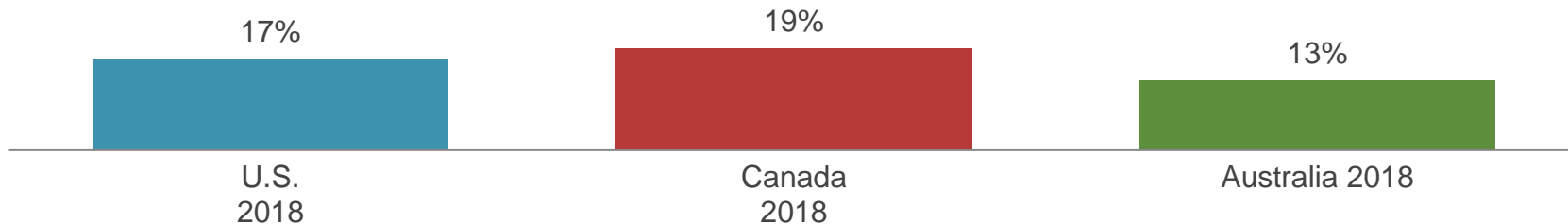
# Weekly Podcast Listening in Australia



# Weekly Podcast Listening

Base: Total Population 18+

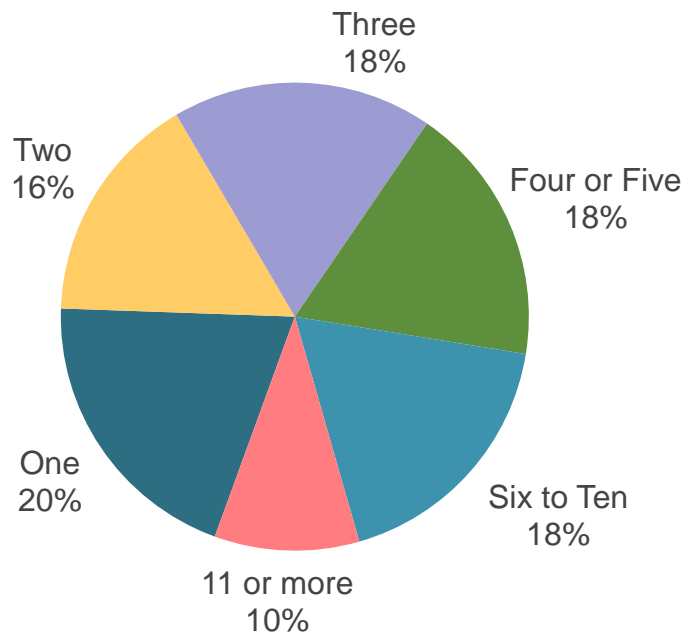
% listened to a podcast in the last week





# Number of Podcasts Listened to in Last Week in Australia

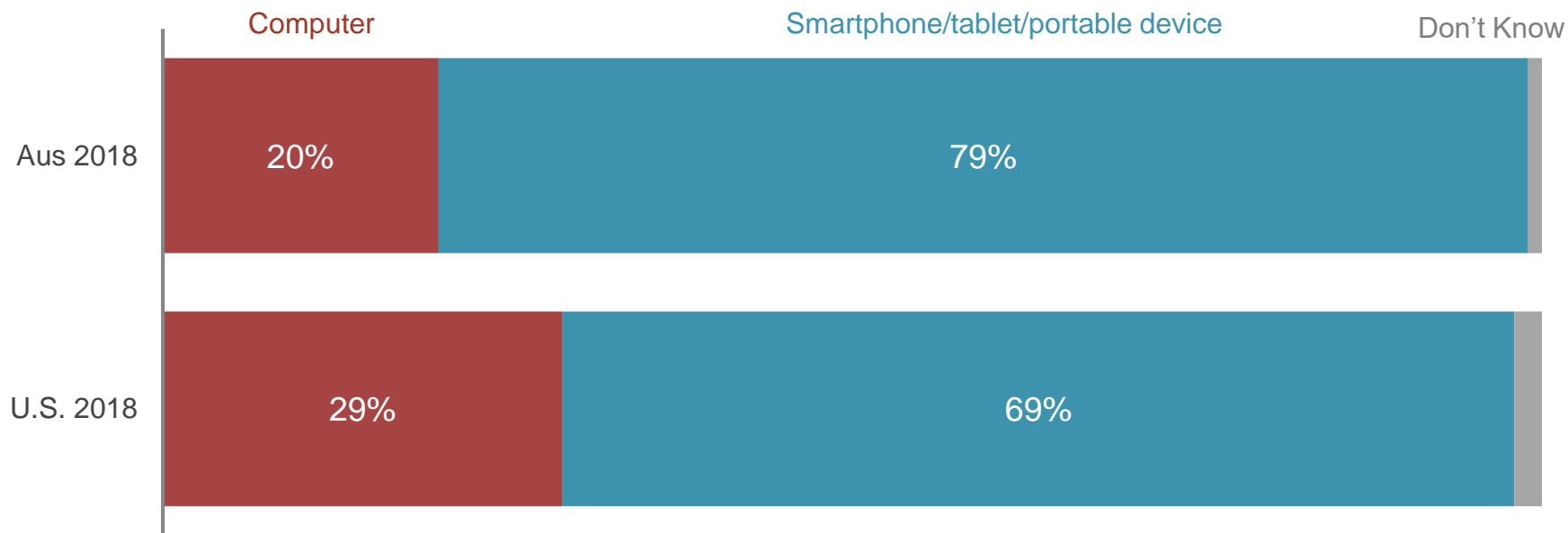
Base: Weekly Podcast Listeners



Average of FIVE podcasts listened in last week

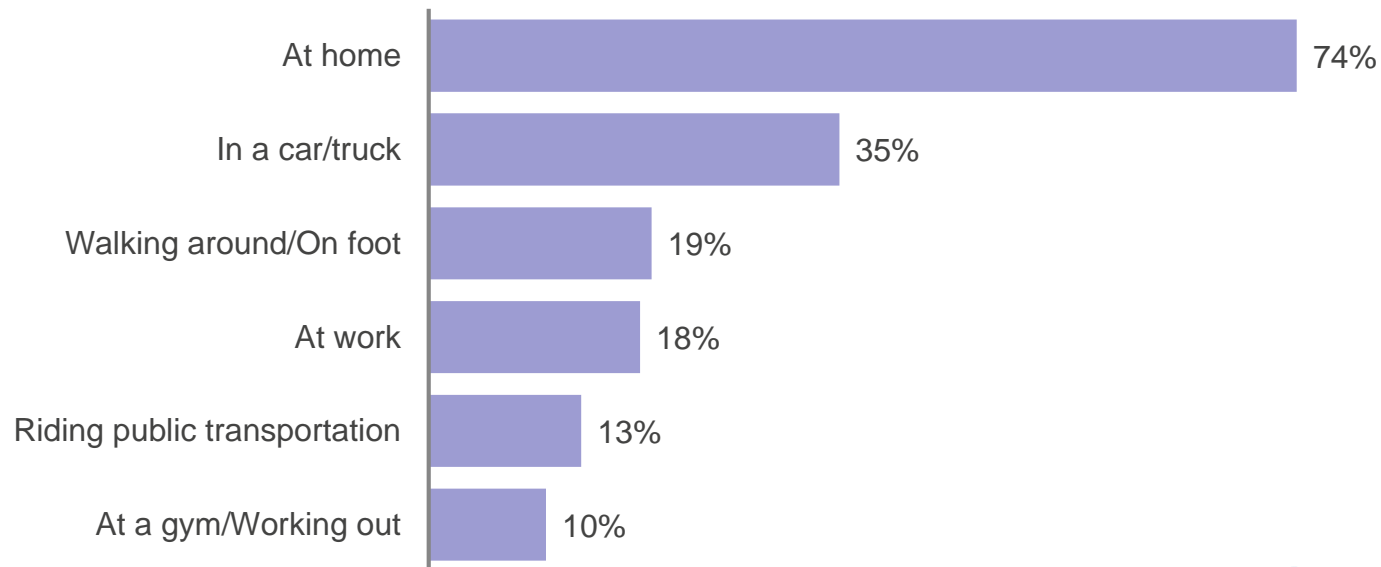
# Device Used Most Often to Listen to Podcasts

Base: Ever Listened to a Podcast



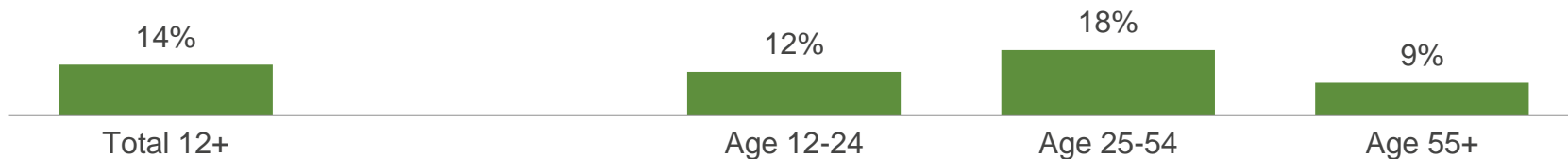
# Podcast Listening Locations in Australia

Base: Ever Listened to a Podcast



# Radio Podcast Listening

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

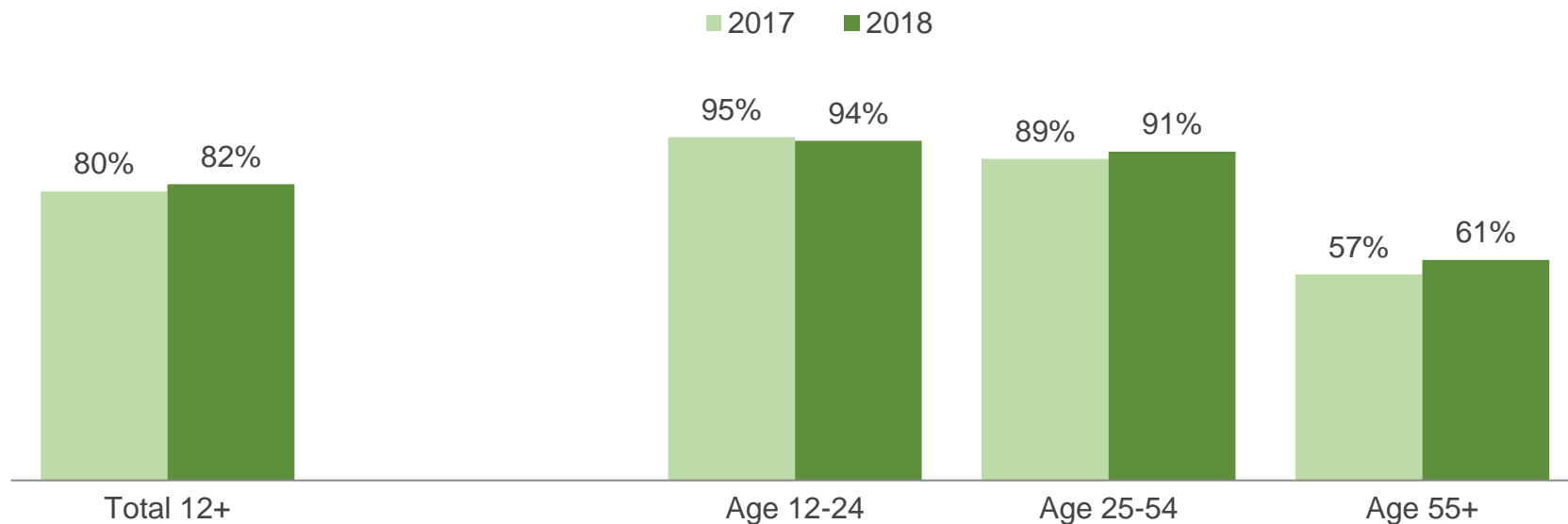




# SOCIAL MEDIA & ON-DEMAND VIDEO



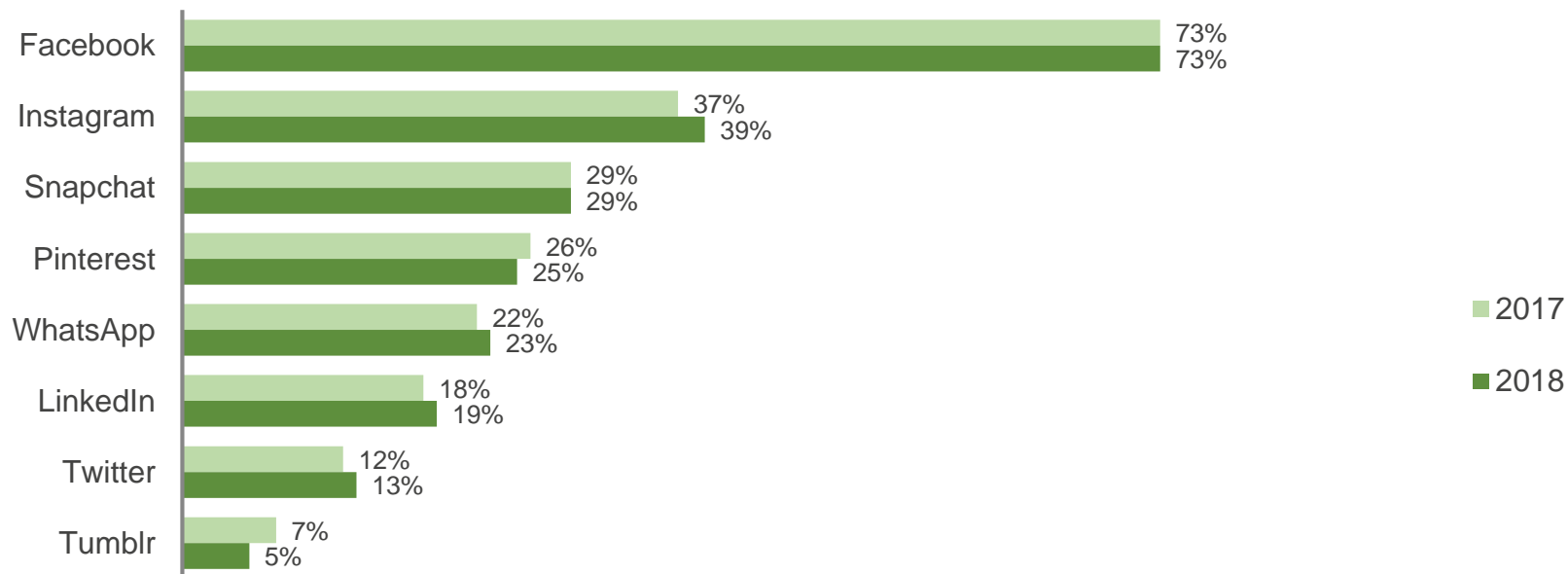
# Overall Social Media Usage in Australia



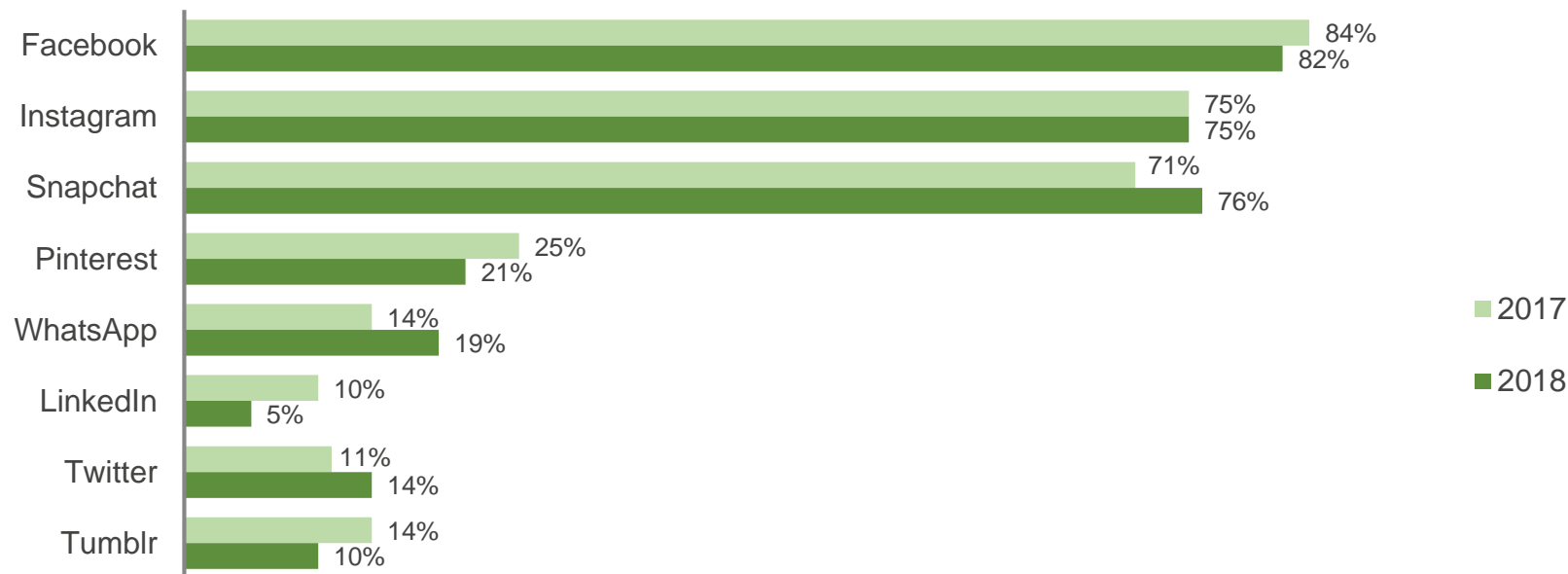


# Social Media Brand Usage in Australia

Base: Total Population 12+



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

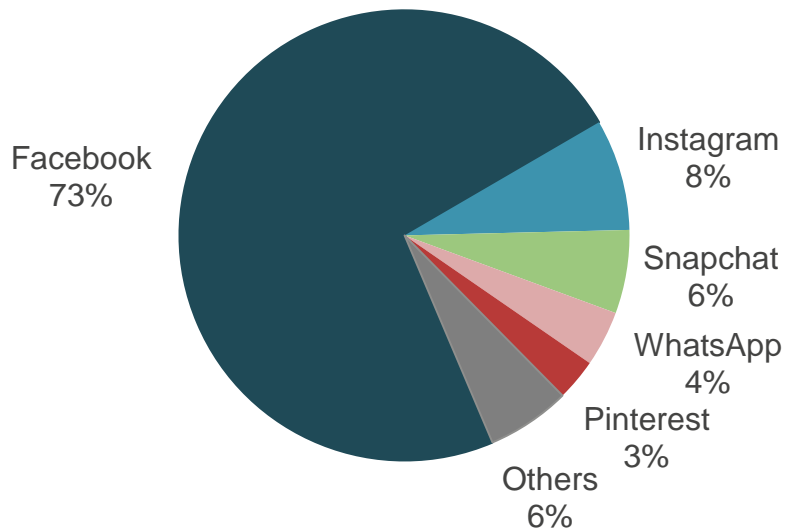




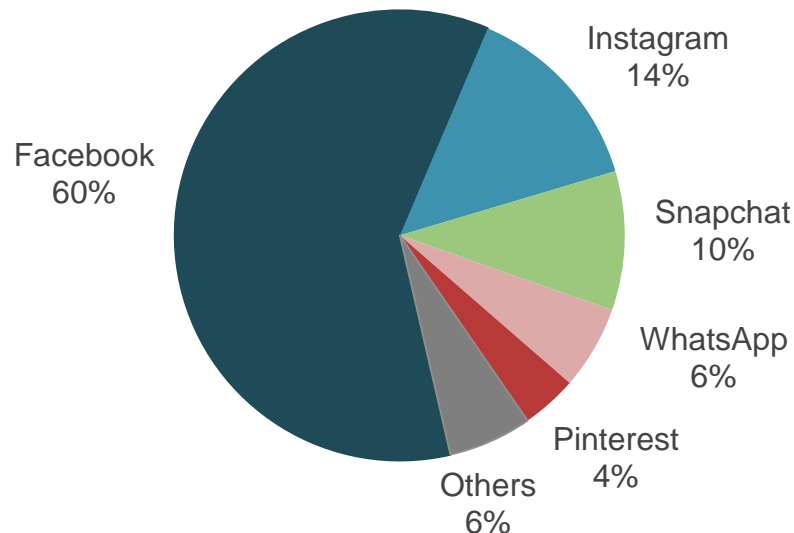
# Social Media Brand Used Most Often in Australia

Base: Currently use any social networking brands

2017

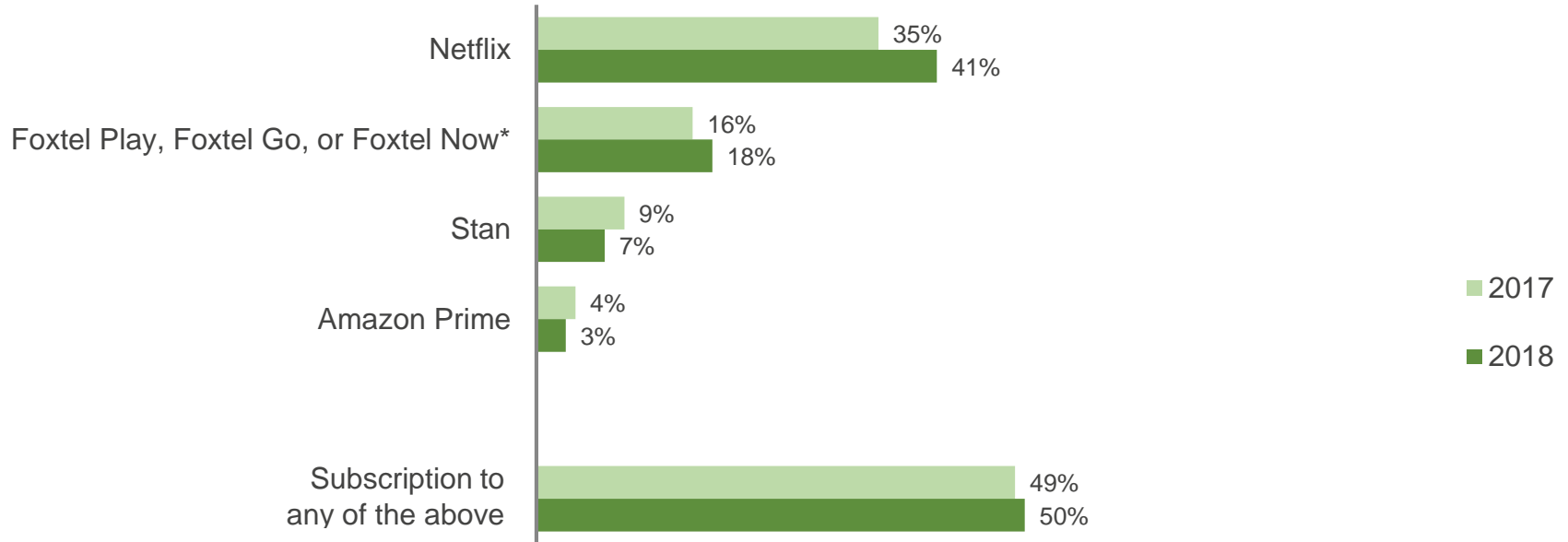


2018



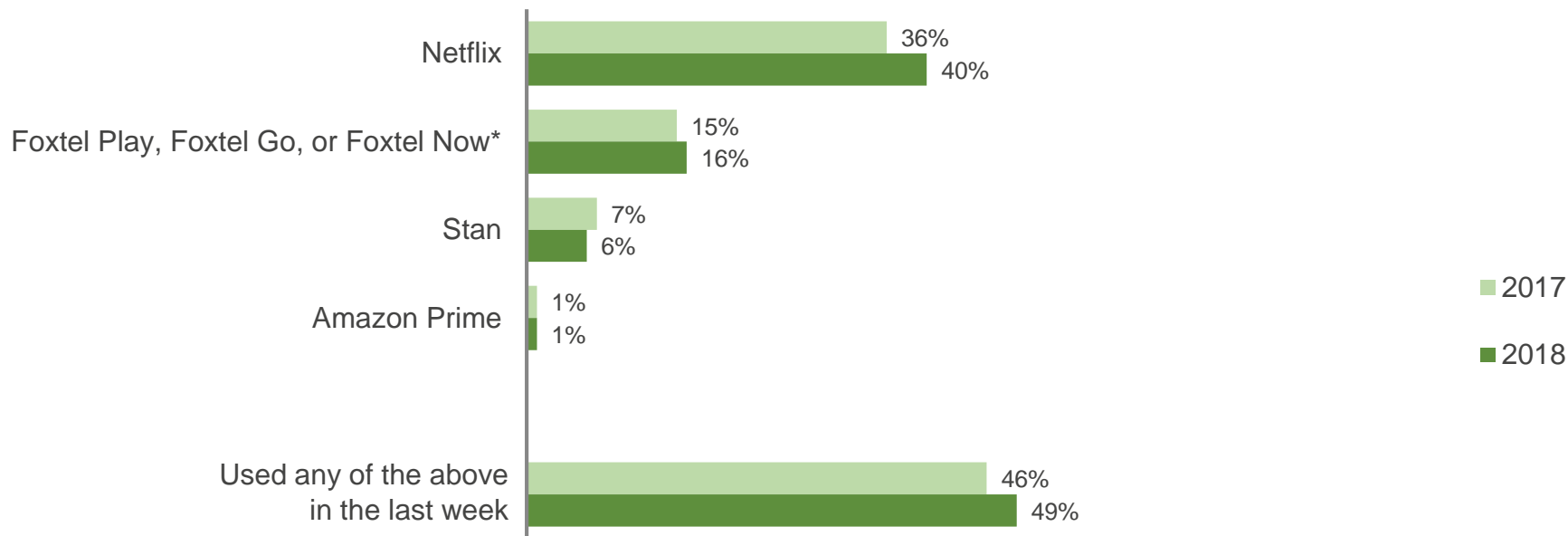
# On-Demand Video Service Subscription in Australia

Base: Total Population 12+



# Used On-Demand Video Service in Last Week in Australia

Base: Total Population 12+



# 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



# Questions? Comments?

LRosin@edisonresearch.com



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