THE INFINITE DIAL AUSTRALIA 2017

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

% listened to AM/FM Radio in last week

- Total 12+: 85%
- Age 12-24: 77%
- Age 25-54: 88%
- Age 55+: 86%

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

Sponsored by:
- Commercial Radio Australia
- Southern Cross Austereo
- Triton
Listening to AM/FM Radio in the Last Week

Base: Total Population 12+

% listened to AM/FM Radio in last week

<table>
<thead>
<tr>
<th>Country</th>
<th>% Listened</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S. 2017</td>
<td>64%</td>
</tr>
<tr>
<td>Aus 2017</td>
<td>85%</td>
</tr>
</tbody>
</table>

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

Sponsored by:
- Edison Research
- Commercial Radio Australia
- Southern Cross Austereo
- Triton
Number of Radios Owned in Homes in Australia

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Zero</th>
<th>One to Three</th>
<th>Four or more</th>
<th>Mean # of Radios</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total 12+</td>
<td>21%</td>
<td>68%</td>
<td>11%</td>
<td>1.7</td>
</tr>
<tr>
<td>Age 12-24</td>
<td>31%</td>
<td>59%</td>
<td>10%</td>
<td>1.3</td>
</tr>
<tr>
<td>Age 25-54</td>
<td>25%</td>
<td>66%</td>
<td>9%</td>
<td>1.6</td>
</tr>
<tr>
<td>Age 55+</td>
<td>9%</td>
<td>76%</td>
<td>15%</td>
<td>2.2</td>
</tr>
</tbody>
</table>
Number of Radios Owned in Home

<table>
<thead>
<tr>
<th></th>
<th>Zero</th>
<th>One to Three</th>
<th>Four or more</th>
<th>Mean # of Radios</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aus 2017</td>
<td>21%</td>
<td>68%</td>
<td>11%</td>
<td>1.7</td>
</tr>
<tr>
<td>U.S. 2016</td>
<td>22%</td>
<td>63%</td>
<td>15%</td>
<td>1.9</td>
</tr>
</tbody>
</table>

*Not asked in U.S. in 2017
Online Listening to AM/FM Radio in Australia in the Last Month

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

Total 12+: 17%
Age 12-24: 14%
Age 25-54: 21%
Age 55+: 14%

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- SOUTHERN CROSS AUSTERE
- TRITON
Online Listening to AM/FM Radio in the Last Month

Base: Total Population 12+

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

- U.S. 2014: 12%
- U.S. '15: 18%
- U.S. '16: 18%
- U.S. 2017: 18%
- Aus 2017: 17%
Online Listening to AM/FM Radio in Australia in the Last Week

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

- Total 12+: 11%
- Age 12-24: 7%
- Age 25-54: 12%
- Age 55+: 10%
Audio Aggregator Brand Awareness in Australia

Base: Total Population 12+

% aware of audio aggregator brand

- iHeartRadio: 27%
- Tuneln Radio: 19%
- RadioApp: 15%

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- Edison Research
- Commercial Radio Australia
- Southern Cross Austereo
- Triton
Audio Aggregator Brand Awareness

Base: Total Population 12+

% aware of audio aggregator brand

- iHeartRadio: 27% (Aus 2017), 71% (U.S. 2017)
- TuneIn Radio: 19% (Aus 2017), 18% (U.S. 2017)
- RadioApp: 15% (Aus 2017)
Audio Aggregators: Monthly Listening in Australia

Base: Total Population 12+

% listened to aggregator in last month

- iHeartRadio: 1%
- TuneIn Radio: 4%
- RadioApp: 2%

Sponsored by: [Logos]
Audio Aggregators: Weekly Listening in Australia

Base: Total Population 12+

% listened to aggregator in last week

- iHeartRadio: 1%
- Tuneln Radio: 2%
- RadioApp: 1%

Sponsored by:

- Edison Research
- Commercial Radio Australia
- Southern Cross Austereo
- Triton
ONLINE AUDIO STREAMING SERVICES
Awareness of Online Audio Streaming Services in Australia

% aware of online audio streaming service

- Spotify: 73%
- Apple Music*: 72%
- Pandora: 63%
- Google Play All Access: 36%
- Tidal: 10%
- Rdio: 6%
- MOG: 3%
- Slacker: 2%

*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

- **Spotify**: 73% (Aus 2017), 62% (U.S. 2017)
- **Apple Music**: 72% (Aus 2017), 60% (U.S. 2017)
- **Pandora**: 63% (Aus 2017), 86% (U.S. 2017)
- **Google Play All Access**: 50% (Aus 2017), 36% (U.S. 2017)
- **Tidal**: 11% (Aus 2017), 10% (U.S. 2017)
- **Rdio**: 11% (Aus 2017), 6% (U.S. 2017)
- **MOG**: 3% (Aus 2017), 2% (U.S. 2017)
- **Slacker**: 19% (Aus 2017), 2% (U.S. 2017)

*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

- Spotify: 21%
- Apple Music*: 6%
- Pandora: 8%
- Google Play All Access: 2%

*Asked as “Apple Music, the paid music subscription from Apple”
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

- AM/FM Radio: 89%
- CD Player: 59%
- Owned Digital Music: 38%
- DAB+ Radio Receiver: 10%
- Podcasts: 8%
- Online Audio Streaming Services: 8%
- Online AM/FM Stations: 4%
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

- AM/FM Radio: Aus 2017 - 82%, U.S. 2017 - 89%
- CD Player: Aus 2017 - 52%, U.S. 2017 - 59%
- Owned Digital Music: Aus 2017 - 38%, U.S. 2017 - 45%
- DAB+ Radio Receiver: Aus 2017 - 10%
- Online Audio: Aus 2017 - 9%, U.S. 2017 - 26%
- Podcasts: Aus 2017 - 8%, U.S. 2017 - 19%
- Satellite Radio: Aus 2017 - 22%

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SOUTHERN CROSS AUSTEREO
TRITON
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

- AM/FM Radio: 67% (Aus 2017), 47% (U.S. 2017)
- Owned Digital Music: 19% (Aus 2017), 18% (U.S. 2017)
- CD Player: 10% (Aus 2017), 10% (U.S. 2017)
- DAB+ Receiver: 3% (Aus 2017), 3% (U.S. 2017)
- Online Radio: 11% (Aus 2017), 3% (U.S. 2017)
- Podcasts: 4% (Aus 2017), 2% (U.S. 2017)
- Satellite Radio: 13% (Aus 2017)
PODCASTING
Familiar with the term “Podcasting” in Australia

% familiar with the term podcasting

- Total 12+: 72%
- Age 12-24: 79%
- Age 25-54: 83%
- Age 55+: 52%

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- Commercial Radio Australia
- Southern Cross Austereo
- Triton
Familiar with the term “Podcasting”

% familiar with the term podcasting

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>U.S.</td>
<td>22%</td>
<td>37%</td>
<td>37%</td>
<td>43%</td>
<td>45%</td>
<td>45%</td>
<td>46%</td>
<td>46%</td>
<td>48%</td>
<td>49%</td>
<td>55%</td>
<td>60%</td>
<td>72%</td>
</tr>
</tbody>
</table>

Base: Total Population 12+
Monthly Podcast Listening in Australia

% listened to a podcast in the last month

- Total 12+: 17%
- Age 12-24: 22%
- Age 25-54: 20%
- Age 55+: 10%

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Monthly Podcast Listening

Base: Total Population 12+

% listened to a podcast in the last month

- U.S. 2008: 9%
- U.S. '09: 11%
- U.S. '10: 12%
- U.S. '11: 12%
- U.S. '12: 14%
- U.S. '13: 12%
- U.S. '14: 15%
- U.S. '15: 17%
- U.S. '16: 21%
- U.S. 2017: 24%
- Aus 2017: 17%

Sponsored by:
- Edison Research
- Commercial Radio Australia
- Soutern Cross Austereo
- Triton
Monthly Podcast Listening

Base: Total Population 12+

% listened to a podcast in the last month

- U.S. 2017
- Aus 2017

Men:
- 27%
- 20%

Women:
- 21%
- 15%

Sponsored by:
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- Commercial Radio Australia
- Southern Cross Austereo
- Triton
Weekly Podcast Listening in Australia

% listened to a podcast in the last week

- Total 12+: 10%
- Age 12-24: 13%
- Age 25-54: 13%
- Age 55+: 4%

Sponsored by: Edison Research, Commercial Radio Australia, Southern Cross Austereo, Triton
Weekly Podcast Listening

% listened to a podcast in the last week

- U.S. 2013: 7%
- U.S. '14: 8%
- U.S. '15: 10%
- U.S. '16: 13%
- U.S. 2017: 15%
- Aus 2017: 10%

Base: Total Population 12+
Number of Podcasts Listened to in Last Week in Australia

- Three: 26%
- Two: 13%
- One: 22%
- 11 or more: 12%
- Four or Five: 20%
- Six to Ten: 7%

Average of six podcasts listened in last week

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SOUTHERN CROSS Austereo
TRITON
Device Used Most Often to Listen to Podcasts

Base: Ever Listened to a Podcast

<table>
<thead>
<tr>
<th></th>
<th>Computer</th>
<th>Smartphone/tablet/portable device</th>
<th>Don’t Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aus 2017</td>
<td>36%</td>
<td>62%</td>
<td></td>
</tr>
<tr>
<td>U.S. 2017</td>
<td>33%</td>
<td>65%</td>
<td></td>
</tr>
</tbody>
</table>
Podcast Listening Locations in Australia

% ever listened to podcasts in location

- At home: 75%
- In a car/truck: 30%
- Riding public transportation: 18%
- At work: 17%
- Walking around/On foot: 17%
- At a gym/Working out: 9%

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Amount of Podcast Episode Listened to in Australia

Base: Ever Listened to a Podcast

- The entire podcast episode 50%
- Most of the podcast 37%
- Less than half the podcast 10%
- Just the beginning of the podcast 3%

Sponsored by: Edison Research, Commercial Radio Australia, Southern Cross Austereo, Triton
Amount of Podcast Episode Listened To

Base: Ever Listened to a Podcast

<table>
<thead>
<tr>
<th></th>
<th>Aus 2017</th>
<th>U.S. 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>The entire podcast episode</td>
<td>50%</td>
<td>40%</td>
</tr>
<tr>
<td>Most of the podcast episode</td>
<td>37%</td>
<td>45%</td>
</tr>
<tr>
<td>Less than half of episode</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Just the beginning</td>
<td>3%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Sponsored by: Edison Research, Commercial Radio Australia, Southern Cross Austereo, Triton
Method of Listening to Podcasts in Australia

Base: Ever listened to a podcast

<table>
<thead>
<tr>
<th>Method</th>
<th>% ever using method to listen to podcasts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click on podcast and listen immediately</td>
<td>62%</td>
</tr>
<tr>
<td>Download podcast manually and listen later</td>
<td>48%</td>
</tr>
<tr>
<td>Subscribe to podcast and download automatically to listen later</td>
<td>27%</td>
</tr>
</tbody>
</table>
Percent of all podcasts downloaded and then listened to

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

<table>
<thead>
<tr>
<th></th>
<th>100%-76%</th>
<th>75%-51%</th>
<th>50%-26%</th>
<th>25%-1%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aus 2017</td>
<td>69%</td>
<td>11%</td>
<td>14%</td>
<td>6%</td>
</tr>
<tr>
<td>U.S. 2017</td>
<td>52%</td>
<td>15%</td>
<td>20%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Sponsored by: Edison Research, Commercial Radio Australia, Southern Cross Austereo, Triton
Number of Podcasts Subscribed to in Australia

Base: Have ever subscribed to podcasts

- One: 18%
- Two: 16%
- Three: 16%
- Four or Five: 18%
- Six to Ten: 23%
- 11 or more: 9%

Average of five podcasts subscribed to
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%

% ever using source

- AM/FM Radio: 80%
- Friends/Family: 75%
- YouTube: 57%
- Facebook: 40%
- Spotify: 35%
- Music television channels: 28%
- Apple iTunes: 26%
- Pandora: 15%
- Information or displays at a local store: 15%
- Blogs about music: 11%
- iHeartRadio: 1%

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YouTube Usage in Australia

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

- Ever
- In the Last Month
- In the Last Week

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Total 12+</th>
<th>Age 12-24</th>
<th>Age 25-54</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ever</td>
<td>73%</td>
<td>94%</td>
<td>81%</td>
</tr>
<tr>
<td>In the Last Month</td>
<td>59%</td>
<td>82%</td>
<td>65%</td>
</tr>
<tr>
<td>In the Last Week</td>
<td>44%</td>
<td>69%</td>
<td>47%</td>
</tr>
</tbody>
</table>
YouTube Usage

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

Base: Total Population 12+

- Ever
- In the Last Month
- In the Last Week

Aus 2017:
- Ever: 73%
- In the Last Month: 59%
- In the Last Week: 44%

U.S. 2017:
- Ever: 68%
- In the Last Month: 57%
- In the Last Week: 43%

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- Triton
SOCIAL MEDIA
Social Media Usage in Australia

% currently use any social media

- Total 12+: 80%
- Age 12-24: 95%
- Age 25-54: 89%
- Age 55+: 57%
Social Media Brand Awareness in Australia

Base: Total Population 12+

% aware of social media brand

- Facebook: 98%
- Twitter: 95%
- Instagram: 94%
- Snapchat: 84%
- Pinterest: 64%
- LinkedIn: 63%
- Tumblr: 56%
- WhatsApp: 56%
Social Media Brand Usage in Australia

Base: Total Population 12+

% currently ever use social media brand

- Facebook: 73%
- Instagram: 37%
- Snapchat: 29%
- Pinterest: 26%
- WhatsApp: 22%
- LinkedIn: 18%
- Twitter: 12%
- Tumblr: 7%

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

% currently ever use social media brand

- Facebook: 84%
- Instagram: 75%
- Snapchat: 71%
- Pinterest: 25%
- WhatsApp: 14%
- LinkedIn: 10%
- Twitter: 11%
- Tumblr: 14%

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Social Media Brand Used Most Often in Australia

Base: Currently use any social networking brands

- Facebook: 73%
- Instagram: 8%
- Snapchat: 6%
- Pinterest: 6%
- LinkedIn: 3%
- Twitter: 2%
- Others: 6%
Device Ownership in Australia

Base: Total Population 12+

% owning device:
- Smartphone: 88%
- Tablet: 54%
- Internet-connected TV: 14%
Smartphone Ownership in Australia

% owning a smartphone

- Total 12+: 88%
- Age 12-24: 95%
- Age 25-54: 95%
- Age 55+: 72%

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Smartphone Ownership

Base: Total Population 12+

% owning a smartphone

- U.S. 2009: 10%
- U.S. '10: 14%
- U.S. '11: 31%
- U.S. '12: 44%
- U.S. '13: 53%
- U.S. '14: 61%
- U.S. '15: 71%
- U.S. '16: 76%
- U.S. 2017: 81%
- Aus 2017: 88%
On-Demand Video Service Subscription in Australia

Base: Total Population 12+

% having a subscription

- Netflix: 35%
- Foxtel Play, Foxtel Go, or Presto: 16%
- Stan: 9%
- Amazon Prime: 4%
- Subscription to any of the above: 49%
On-Demand Video Service Subscription

Base: Total Population 12+

% having a subscription

- Netflix
  - Aus 2017: 4%
  - U.S. 2017: 35%

- Amazon Prime
  - Aus 2017: 29%
  - U.S. 2017: 50%
Netflix Subscription

Base: Total Population 12+

% having a subscription

- U.S. 2016: 43%
- U.S. 2017: 50%
- Aus 2017: 35%

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- Southern Cross Austereo
- Triton
Amazon Prime Subscription

Base: Total Population 12+

% having a subscription

U.S. 2016: 22%
U.S. 2017: 29%
Aus 2017: 4%
Used On-Demand Video Service in Last Week in Australia

Base: Total Population 12+

% using service in last week

- Netflix: 36%
- Foxtel Play, Foxtel Go, or Presto: 15%
- Stan: 7%
- Amazon Prime Instant Video: 1%
- Used any of the above in the last week: 46%
Used On-Demand Video Service in Last Week

Base: Total Population 12+

<table>
<thead>
<tr>
<th>Service</th>
<th>% using service in last week</th>
</tr>
</thead>
<tbody>
<tr>
<td>Netflix</td>
<td>36%</td>
</tr>
<tr>
<td>Amazon Prime Instant Video</td>
<td>13%</td>
</tr>
<tr>
<td></td>
<td>1%</td>
</tr>
<tr>
<td></td>
<td>45%</td>
</tr>
</tbody>
</table>

Sponsored by:
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- Triton
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.
- The concept of ‘Podcasting’ is better known in Australia than in the U.S. but usage is lower.
Key Takeaways

- 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
Questions? Comments?

info@edisonresearch.com