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

Base: Total Population 12+

- 2017: 85%
- 2018: 88%

*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+

65% U.S. 2018

88% Aus 2018

*AM/FM Radio includes both “over-the-air” and online.
### Number of Radios Owned in Homes in Australia

**Base: Total Population 12+**

<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>2017</td>
<td>21%</td>
<td>68%</td>
<td>11%</td>
<td>1.7</td>
</tr>
<tr>
<td>2018</td>
<td>24%</td>
<td>65%</td>
<td>11%</td>
<td>1.6</td>
</tr>
</tbody>
</table>

*2017 figures do not include DAB+ radios

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Sponsored by:

[Edison Research](https://www.edisonresearch.com)

[Commercial Radio Australia](https://www.commercialradioaustralia.com)

[PodcastOne](https://www.podcastone.com)

[TRITON](https://tritondigital.com)
Number of Radios Owned in Home

Base: Total Population 12+

<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>Australia 2018</td>
<td>24%</td>
<td>65%</td>
<td>11%</td>
<td>1.6</td>
</tr>
<tr>
<td>U.S.A. 2018</td>
<td>29%</td>
<td>60%</td>
<td>11%</td>
<td>1.6</td>
</tr>
</tbody>
</table>

*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?”

- Total 12+: 21%
- Age 12-24: 18%
- Age 25-54: 28%
- Age 55+: 13%
Online Listening to AM/FM Radio in the Last Month

Base: Total Population 12+

- U.S. 2014: 12%
- U.S. '15: 18%
- U.S. '16: 18%
- U.S. '17: 18%
- U.S. 2018: 16%
- Aus 2018: 14%
AUDIO AGGREGATORS
Audio Aggregator Brand Awareness in Australia

Base: Total Population 12+


Sponsored by:
Audio Aggregators: Monthly Listening in Australia

Base: Total Population 12+

- Tuneln Radio: 2% (2017), 4% (2018)
- RadioApp: 2% (2017), 1% (2018)

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Edison Research
Commercial Radio Australia
Podcast One
Triton
Monthly Online Audio Listening

Base: Total Population 18+

% listening to Online Audio in last month

- **U.S. 2018**: 61%
- **Canada 2018**: 57%
- **Australia 2018**: 52%

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+

- **Spotify**: 73% (2017), 77% (2018)
- **Apple Music***: 72% (2017), 75% (2018)
- **Amazon Music**: 37%
- **Google Play All Access**: 36% (2017), 35% (2018)
- **Tidal**: 10%

*Asked as “Apple Music, the paid music subscription from Apple”
Awareness of Online Audio Streaming Services

Base: Total Population 12+

- **Spotify**: 77% (Aus 2018), 65% (U.S. 2018)
- **Apple Music**: 75% (Aus 2018), 60% (U.S. 2018)
- **Amazon Music**: 37% (Aus 2018), 60% (U.S. 2018)
- **Google Play All Access**: 35% (Aus 2018), 51% (U.S. 2018)
- **Tidal**: 10% (Aus 2018), 10% (U.S. 2018)

*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+

- **Spotify**: 21% (2017), 26% (2018)
- **Apple Music**: 6% (2017), 7% (2018)
- **Amazon Music**: 1% (2017), 2% (2018)
- **Google Play All Access**: 2% (2017), 2% (2018)

*Asked as “Apple Music, the paid music subscription from Apple”*
Weekly YouTube Music Usage in Australia

Base: Total Population 12+

<table>
<thead>
<tr>
<th>Year</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>44%</td>
</tr>
<tr>
<td>2018</td>
<td>47%</td>
</tr>
</tbody>
</table>
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

- U.S. 2018: 44%
- Canada 2018: 46%
- Australia 2018: 45%
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

- Total 12+: 53%
- Age 12-24: 59%
- Age 25-54: 58%
- Age 55+: 24%
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)

- **AM/FM Radio**: 89% (2018) vs 89% (2017)
- **CD Player**: 59% (2018) vs 52% (2017)
- **Owned Digital Music**: 38% (2018) vs 37% (2017)
- **DAB+ Radio Receiver**: 10% (2018) vs 6% (2017)
- **Podcasts**: 9% (2018) vs 8% (2017)
- **Online Audio Streaming Services**: 10% (2018) vs 8% (2017)
- **Online AM/FM Stations**: 4% (2018) vs 4% (2017)
Audio Sources Used in Car

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

- AM/FM Radio: Aus 89% / U.S. 82%
- CD Player: Aus 52% / U.S. 49%
- Owned Digital Music: Aus 37% / U.S. 45%
- DAB+ Radio Receiver: Aus 6%
- Online Audio: Aus 9% / U.S. 28%
- Podcasts: Aus 10% / U.S. 23%
- Satellite Radio: Aus 21%
### 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**

<table>
<thead>
<tr>
<th>Year</th>
<th>AM/FM/DAB Radio</th>
<th>CDs/Own music collection</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>75%</td>
<td>20%</td>
<td>5%</td>
</tr>
<tr>
<td>2018</td>
<td>71%</td>
<td>21%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Sponsored by: [Edison Research](#), [Commercial Radio Australia](#), [PodcastOne](#), [Triton](#)
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

2018 U.S.
- AM/FM Radio: 56%
- CDs/Own music collection: 15%
- Satellite Radio: 13%
- Online Audio: 12%
- Podcasts: 3%

2018 Canada
- AM/FM Radio: 63%
- CDs/Own music collection: 22%
- Satellite Radio: 6%
- Online Audio: 4%
- Podcasts: 3%

2018 Australia
- AM/FM Radio: 70%
- CDs/Own music collection: 21%
- Satellite Radio: 3%
- Online Audio: 2%
- Podcasts: 2%

Sponsored by: Edison Research, Commercial Radio Australia, PodcastOne, Triton
Smartphone Ownership in Australia

- Total 12+: 88% (2017) vs 90% (2018)
- Age 12-24: 95% (2017) vs 95% (2018)
- Age 25-54: 95% (2017) vs 96% (2018)
- Age 55+: 72% (2017) vs 77% (2018)
Smartphone Ownership

Base: Total Population 12+

<table>
<thead>
<tr>
<th>Year</th>
<th>U.S.</th>
<th>Aus</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>'10</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>'11</td>
<td>31%</td>
<td></td>
</tr>
<tr>
<td>'12</td>
<td>44%</td>
<td></td>
</tr>
<tr>
<td>'13</td>
<td>53%</td>
<td></td>
</tr>
<tr>
<td>'14</td>
<td>61%</td>
<td></td>
</tr>
<tr>
<td>'15</td>
<td>71%</td>
<td></td>
</tr>
<tr>
<td>'16</td>
<td>76%</td>
<td></td>
</tr>
<tr>
<td>'17</td>
<td>81%</td>
<td></td>
</tr>
<tr>
<td>'18</td>
<td>83%</td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>90%</td>
<td></td>
</tr>
</tbody>
</table>
Smart Speaker Awareness in Australia

Base: Total Population 12+

- Amazon Alexa: 28%
- Google Home: 61%
Smart Speaker Awareness

Base: Total Population 12+

Amazon Alexa
- Aus 2018: 28%
- U.S. 2018: 71%

Google Home
- Aus 2018: 61%
- U.S. 2018: 56%
Smart Speaker Ownership in Australia

- Total 12+: 5%
- Age 12-24: 5%
- Age 25-54: 6%
- Age 55+: 3%
Smart Speaker Ownership

% owning a Smart Speaker

Base: Total Population 18+

- U.S. 2018: 17%
- Canada 2018: 8%
- Australia 2018: 5%
Familiar with the term “Podcasting” in Australia

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Total 12+</th>
<th>Age 12-24</th>
<th>Age 25-54</th>
<th>Age 55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>72%</td>
<td>79%</td>
<td>83%</td>
<td>52%</td>
</tr>
<tr>
<td>2018</td>
<td>78%</td>
<td>81%</td>
<td>88%</td>
<td>62%</td>
</tr>
</tbody>
</table>
Familiar with the term “Podcasting”

Base: Total Population 12+

<table>
<thead>
<tr>
<th>Year</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>22%</td>
</tr>
<tr>
<td>2007</td>
<td>37%</td>
</tr>
<tr>
<td>2008</td>
<td>37%</td>
</tr>
<tr>
<td>2009</td>
<td>43%</td>
</tr>
<tr>
<td>2010</td>
<td>45%</td>
</tr>
<tr>
<td>2011</td>
<td>45%</td>
</tr>
<tr>
<td>2012</td>
<td>46%</td>
</tr>
<tr>
<td>2013</td>
<td>46%</td>
</tr>
<tr>
<td>2014</td>
<td>48%</td>
</tr>
<tr>
<td>2015</td>
<td>49%</td>
</tr>
<tr>
<td>2016</td>
<td>55%</td>
</tr>
<tr>
<td>2017</td>
<td>60%</td>
</tr>
<tr>
<td>2018</td>
<td>64%</td>
</tr>
<tr>
<td>Aus 2018</td>
<td>78%</td>
</tr>
</tbody>
</table>
Monthly Podcast Listening in Australia

<table>
<thead>
<tr>
<th>Category</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total 12+</td>
<td>17%</td>
<td>18%</td>
</tr>
<tr>
<td>Age 12-24</td>
<td>22%</td>
<td>22%</td>
</tr>
<tr>
<td>Age 25-54</td>
<td>20%</td>
<td>22%</td>
</tr>
<tr>
<td>Age 55+</td>
<td>10%</td>
<td>9%</td>
</tr>
</tbody>
</table>
Weekly Podcast Listening in Australia

<table>
<thead>
<tr>
<th>Age Group</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total 12+</td>
<td>10%</td>
<td>13%</td>
</tr>
<tr>
<td>Age 12-24</td>
<td>13%</td>
<td>16%</td>
</tr>
<tr>
<td>Age 25-54</td>
<td>13%</td>
<td>16%</td>
</tr>
<tr>
<td>Age 55+</td>
<td>4%</td>
<td>5%</td>
</tr>
</tbody>
</table>
Weekly Podcast Listening

% listened to a podcast in the last week

- U.S. 2018: 17%
- Canada 2018: 19%
- Australia 2018: 13%

Base: Total Population 18+
Number of Podcasts Listened to in Last Week in Australia

Base: Weekly Podcast Listeners

- 11 or more: 10%
- Six to Ten: 18%
- One: 20%
- Two: 16%
- Three: 18%
- Four or Five: 18%

Average of FIVE podcasts listened in last week
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 2018</td>
<td>20%</td>
<td>79%</td>
<td></td>
</tr>
<tr>
<td>U.S. 2018</td>
<td>29%</td>
<td>69%</td>
<td></td>
</tr>
</tbody>
</table>
Podcast Listening Locations in Australia

Base: Ever Listened to a Podcast

- At home: 74%
- In a car/truck: 35%
- Walking around/On foot: 19%
- At work: 18%
- Riding public transportation: 13%
- At a gym/Working out: 10%
Radio Podcast Listening

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

- Total 12+: 14%
- Age 12-24: 12%
- Age 25-54: 18%
- Age 55+: 9%
Overall Social Media Usage in Australia

- **Total 12+**: 80% (2017), 82% (2018)
- **Age 12-24**: 95% (2017), 94% (2018)
- **Age 25-54**: 89% (2017), 91% (2018)
- **Age 55+**: 57% (2017), 61% (2018)
# Social Media Brand Usage in Australia

**Base:** Total Population 12+

<table>
<thead>
<tr>
<th>Social Media</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>73%</td>
<td>73%</td>
</tr>
<tr>
<td>Instagram</td>
<td>37%</td>
<td>39%</td>
</tr>
<tr>
<td>Snapchat</td>
<td>29%</td>
<td>29%</td>
</tr>
<tr>
<td>Pinterest</td>
<td>26%</td>
<td>25%</td>
</tr>
<tr>
<td>WhatsApp</td>
<td>22%</td>
<td>23%</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>18%</td>
<td>19%</td>
</tr>
<tr>
<td>Twitter</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>Tumblr</td>
<td>7%</td>
<td>5%</td>
</tr>
</tbody>
</table>
Social Media Brand Usage in Australia (Age 12-24)

- Facebook: 84% (2017) to 82% (2018)
- Instagram: 75% (2017) to 75% (2018)
- Snapchat: 71% (2017) to 76% (2018)
- Pinterest: 25% (2017)
- LinkedIn: 10% (2017) to 11% (2018)
- Twitter: 14% (2017) to 14% (2018)
- Tumblr: 14% (2017) to 14% (2018)

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- Commercial Radio Australia
- PodcastOne
- TRITON
Social Media Brand Used Most Often in Australia

Base: Currently use any social networking brands

### 2017
- Facebook: 73%
- Instagram: 8%
- Snapchat: 6%
- WhatsApp: 4%
- Pinterest: 3%
- Others: 6%

### 2018
- Facebook: 60%
- Instagram: 14%
- Snapchat: 10%
- WhatsApp: 6%
- Pinterest: 4%
- Others: 6%
On-Demand Video Service Subscription in Australia

Base: Total Population 12+

Netflix: 35% (2017), 41% (2018)
Foxtel Play, Foxtel Go, or Foxtel Now*: 16% (2017), 18% (2018)
Stan: 9% (2017), 7% (2018)
Amazon Prime: 4% (2017), 3% (2018)
Subscription to any of the above: 49% (2017), 50% (2018)

*2017: Foxtel Play, Foxtel Go, or Presto
Used On-Demand Video Service in Last Week in Australia

Base: Total Population 12+

- **Netflix**: 36% (2017), 40% (2018)
- **Foxtel Play, Foxtel Go, or Foxtel Now***: 15% (2017), 16% (2018)
- **Stan**: 7% (2017), 6% (2018)
- **Amazon Prime**: 1% (2017), 1% (2018)

- **Used any of the above in the last week**: 46% (2017), 49% (2018)

*2017: Foxtel Play, Foxtel Go, or Presto

Sponsored by:
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