THE INFINITE DIAL®

The Infinite Dial 2023 New Zealand

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Presentation Outline

- STUDY OVERVIEW & METHODOLOGY
- MEDIA LANDSCAPE
- AM/FM RADIO
- ONLINE AUDIO
- ONLINE AUDIO PLATFORMS
- PODCASTS
- SMART SPEAKERS AND IN-CAR
- SUMMARY AND SO WHAT

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Study Overview

- Infinite Dial New Zealand measures the current audio landscape, including both AM/FM radio and digital online sources. In addition, this report gauges usage of the latest online platforms and technologies
- The Infinite Dial New Zealand 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
- The Infinite Dial is the longest-running survey of digital media consumer behaviour in America
- This is the second annual Infinite Dial New Zealand report
- This study is designed to allow for direct comparisons among New Zealand and other English-speaking countries where Infinite Dial has been conducted

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Study Methodology

- In the third quarter of 2023, Edison Research conducted a national survey of 1,105 respondents in New Zealand aged 16 and older
    - 300 interviews conducted via telephone
    - 805 interviews conducted online
- Data weighted to reflect the national 16+ population statistics by gender, age, and region

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Media Landscape | Audio

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Weekly Media Consumption

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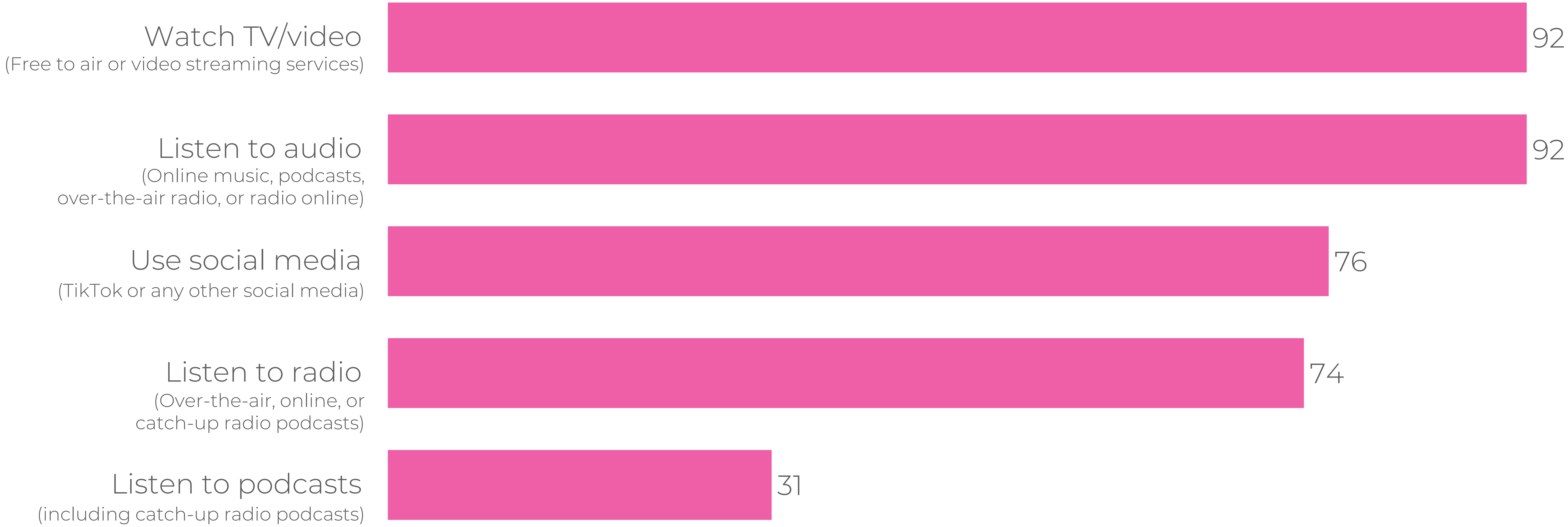
TOTAL NEW ZEALAND POPULATION 16+ (N=1,105)

% DOING ACTIVITY IN THE LAST WEEK



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Weekly Media Consumption

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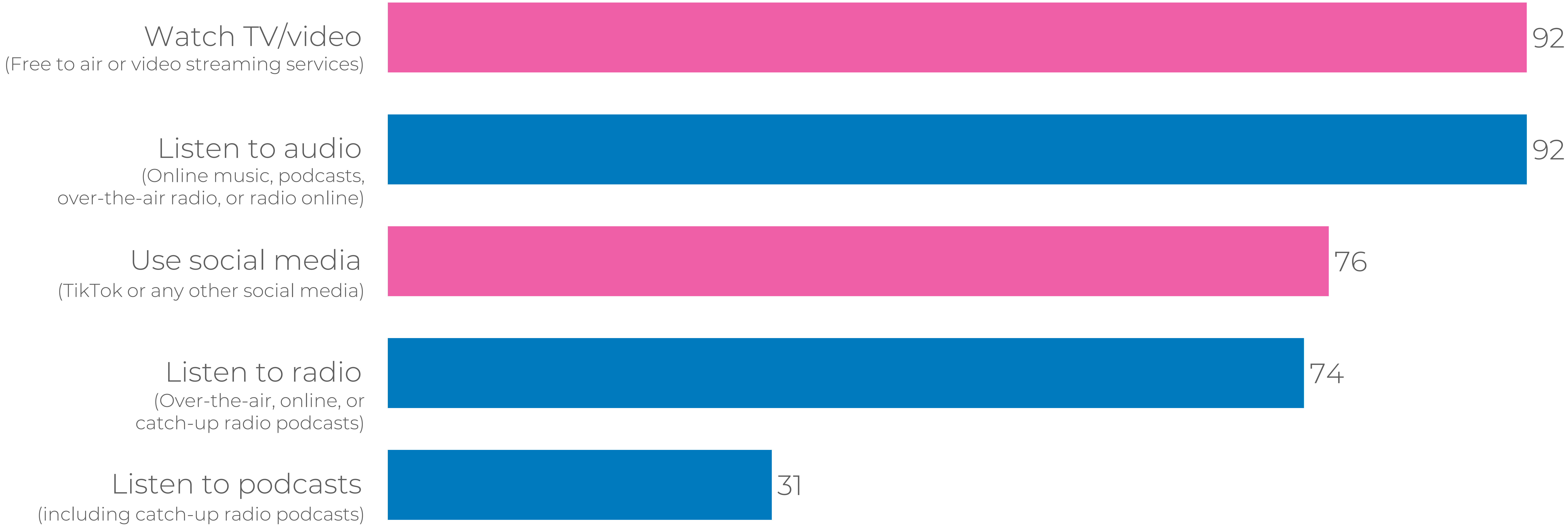
Total audio consumption is equal to total video

TOTAL NEW ZEALAND POPULATION 16+ (N=1,105)

% DOING ACTIVITY IN THE LAST WEEK



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Weekly Media Consumption

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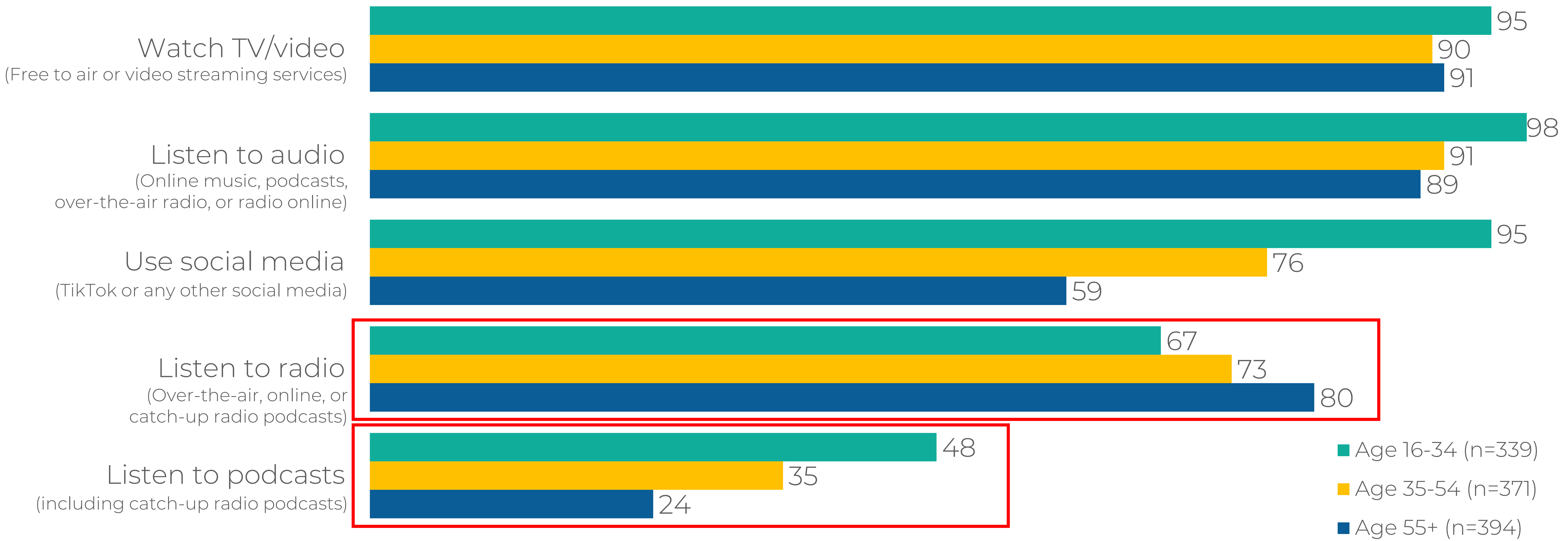
There are distinct behaviours across the age spectrum

TOTAL NEW ZEALAND POPULATION 16+ (N=1,105)

% DOING ACTIVITY IN THE LAST WEEK



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AM/FM Radio

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Listening to AM/FM Radio in the Last Week

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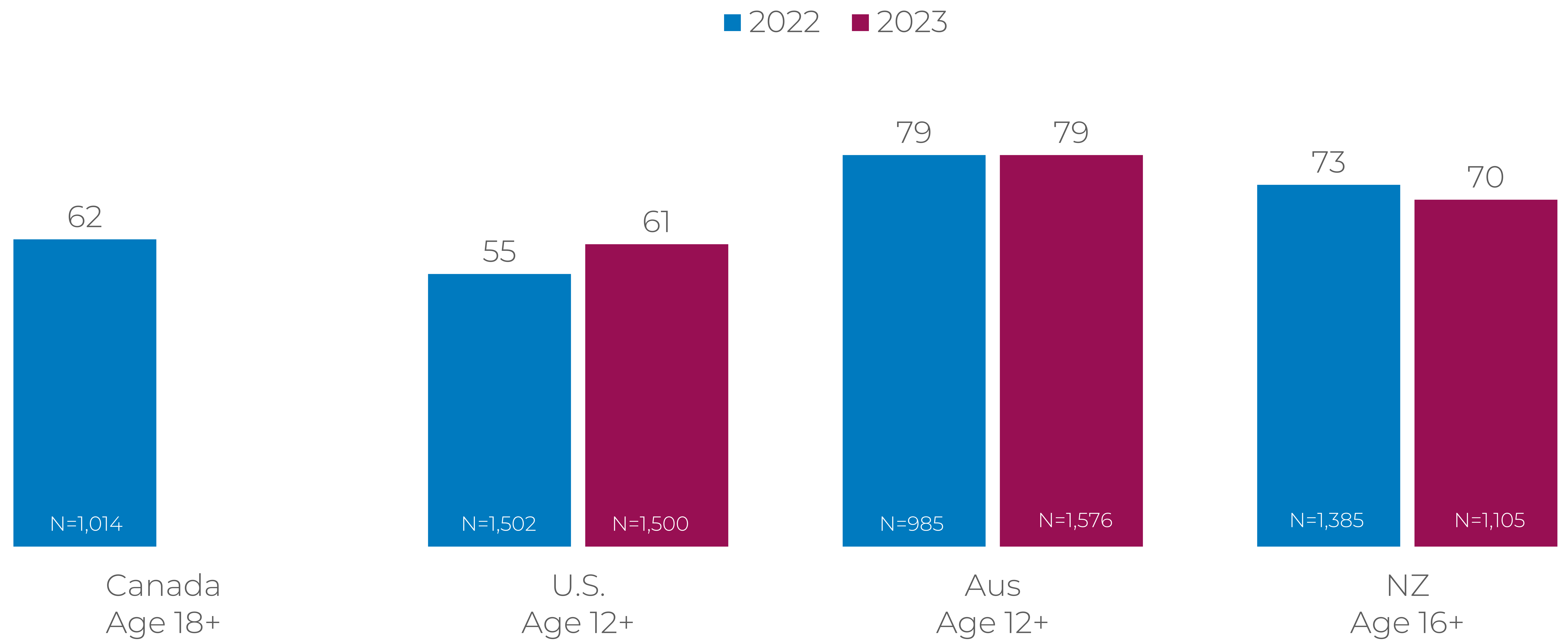
NZ radio remains strong in context of global measures

TOTAL POPULATIONS

% LISTENED TO RADIO IN LAST WEEK

RADIO INCLUDES AM/FM RADIO, BOTH OVER-THE-AIR AND ONLINE



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Listening to AM/FM Radio in the Last Week

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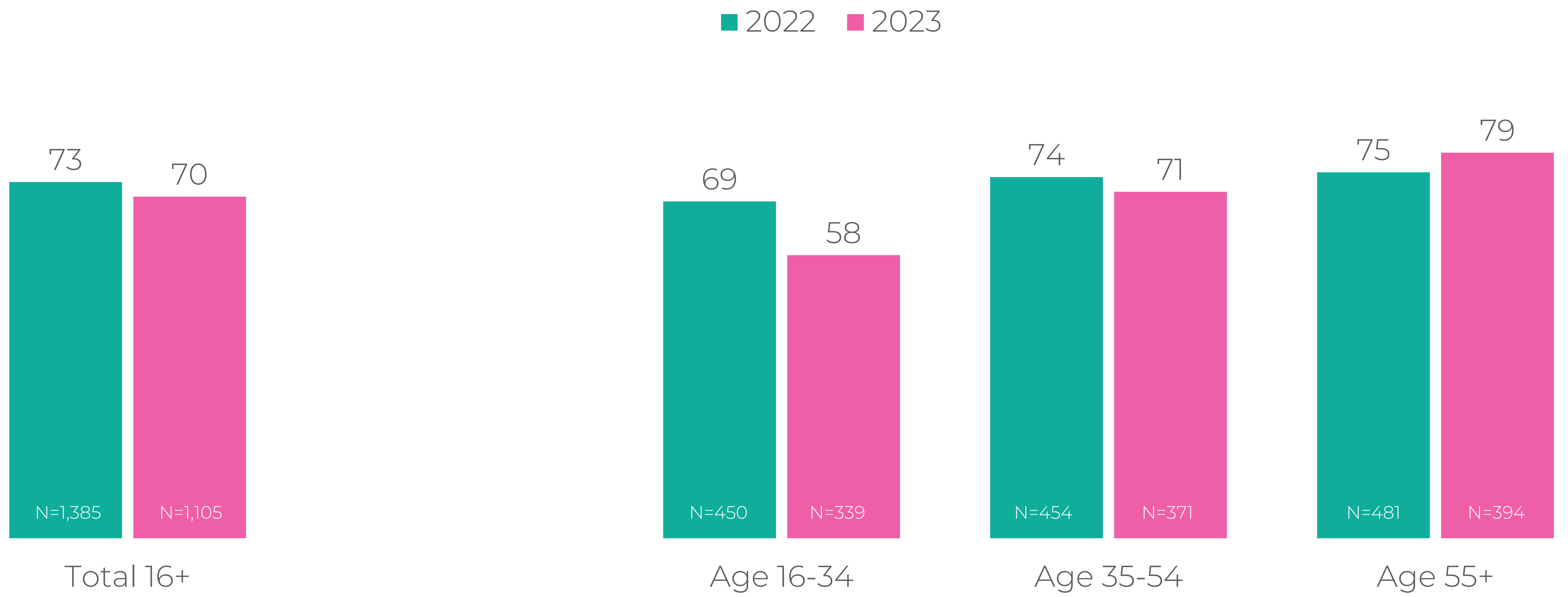
NZ core listening remains older with slight decline registered with lower age range

TOTAL NEW ZEALAND POPULATION 16+

% LISTENED TO RADIO IN LAST WEEK

RADIO INCLUDES AM/FM RADIO, BOTH OVER-THE-AIR AND ONLINE



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Online Audio

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Monthly Online Audio Listening

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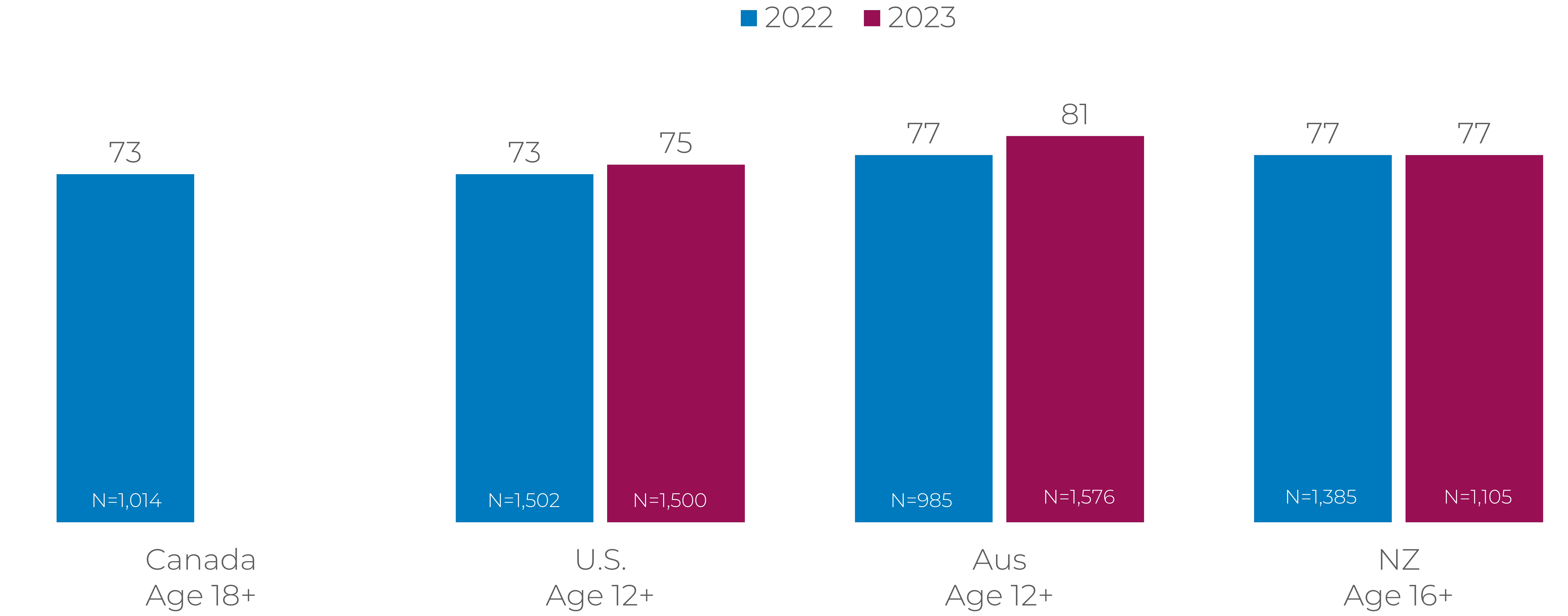
Total online audio very similar across the globe

TOTAL POPULATIONS

% LISTENED TO ONLINE AUDIO IN LAST MONTH

ONLINE AUDIO = LISTENING TO AM/FM RADIO STATIONS ONLINE AND/OR LISTENING TO STREAMED AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET



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Monthly Online Audio Listening

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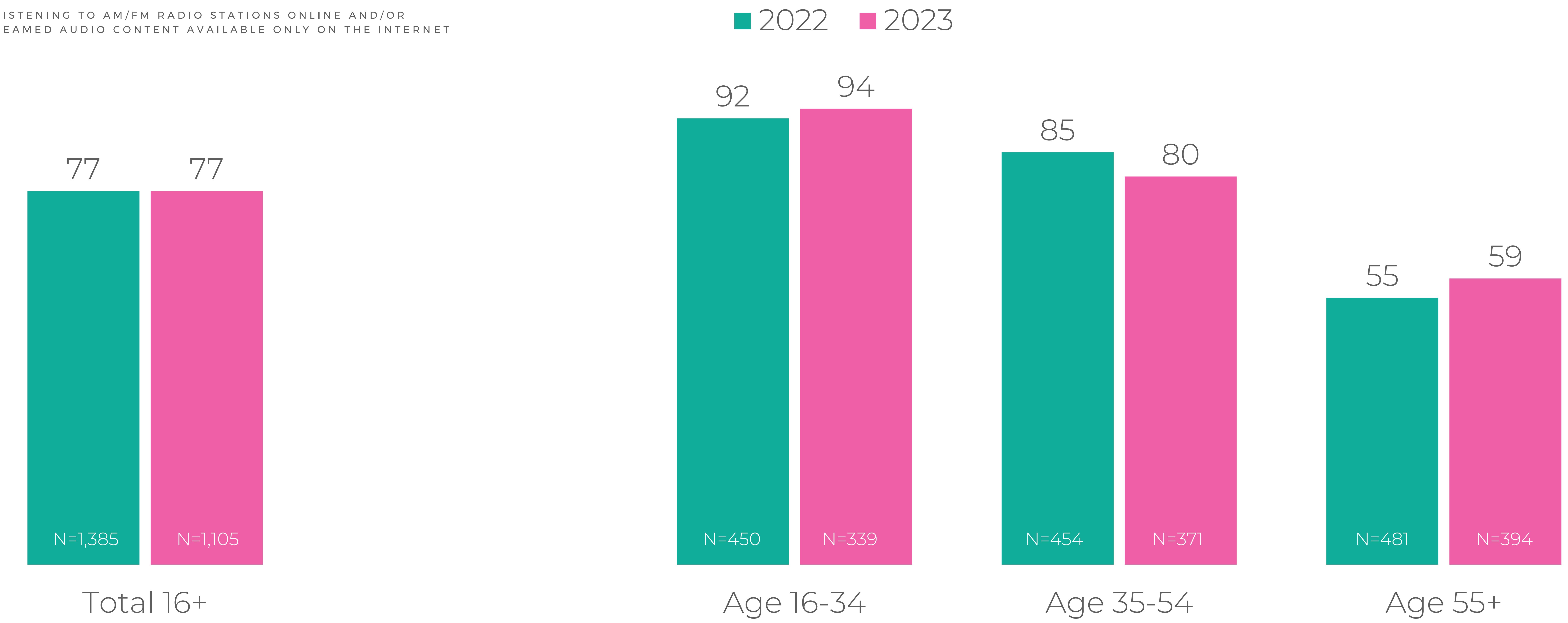
As expected, online audio listening skews younger

TOTAL NEW ZEALAND POPULATION 16+

% LISTENED TO ONLINE AUDIO IN LAST MONTH

ONLINE AUDIO = LISTENING TO AM/FM RADIO STATIONS ONLINE AND/OR LISTENING TO STREAMED AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET



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Online Audio Platforms

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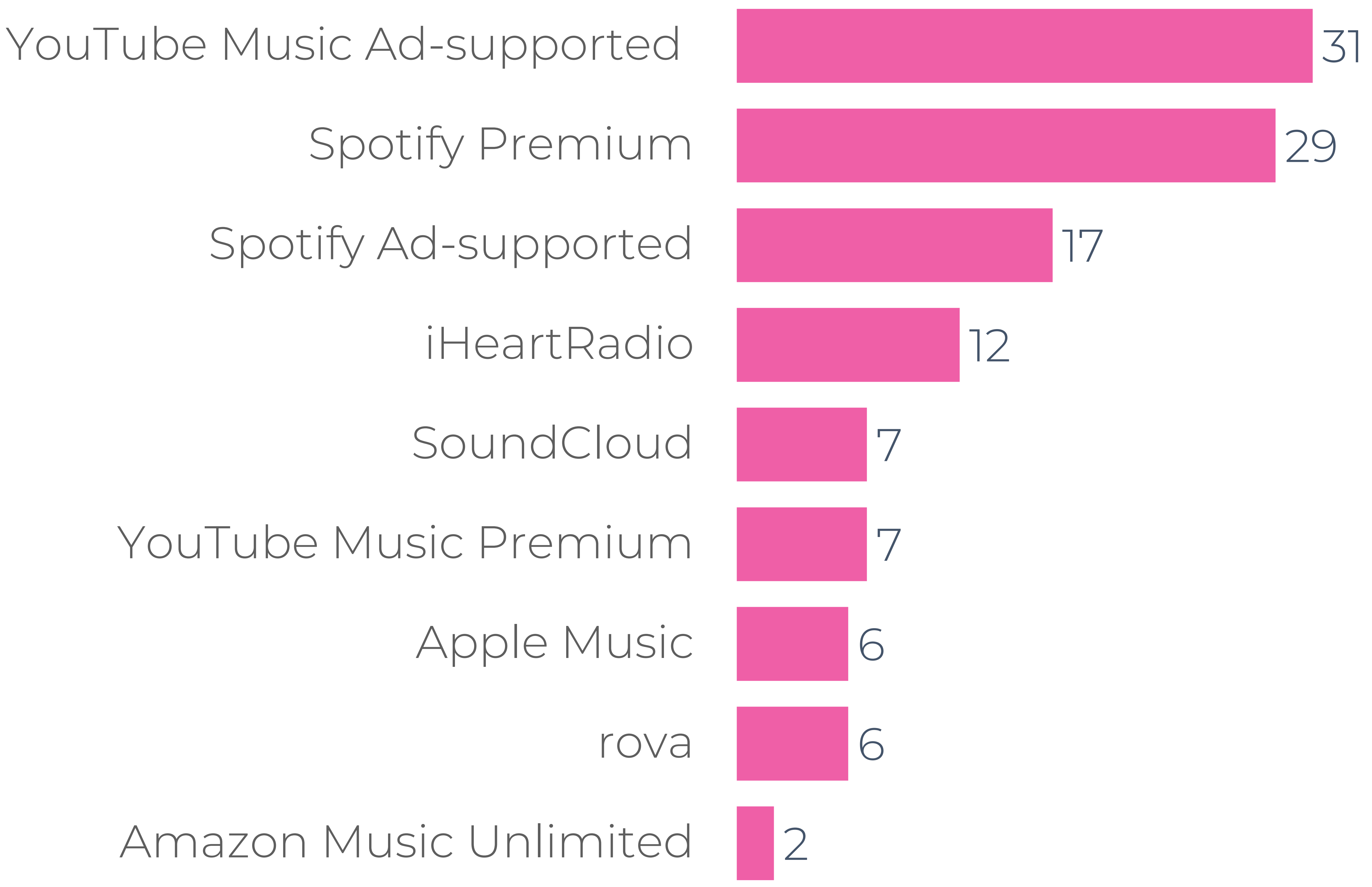
Online Audio Platforms Listened to in Last Month

Spotify's ad-supported tier is far smaller than its premium tier

TOTAL NEW ZEALAND POPULATION 16+ (N=1,105)

% LISTENED TO ONLINE AUDIO BRAND IN LAST MONTH

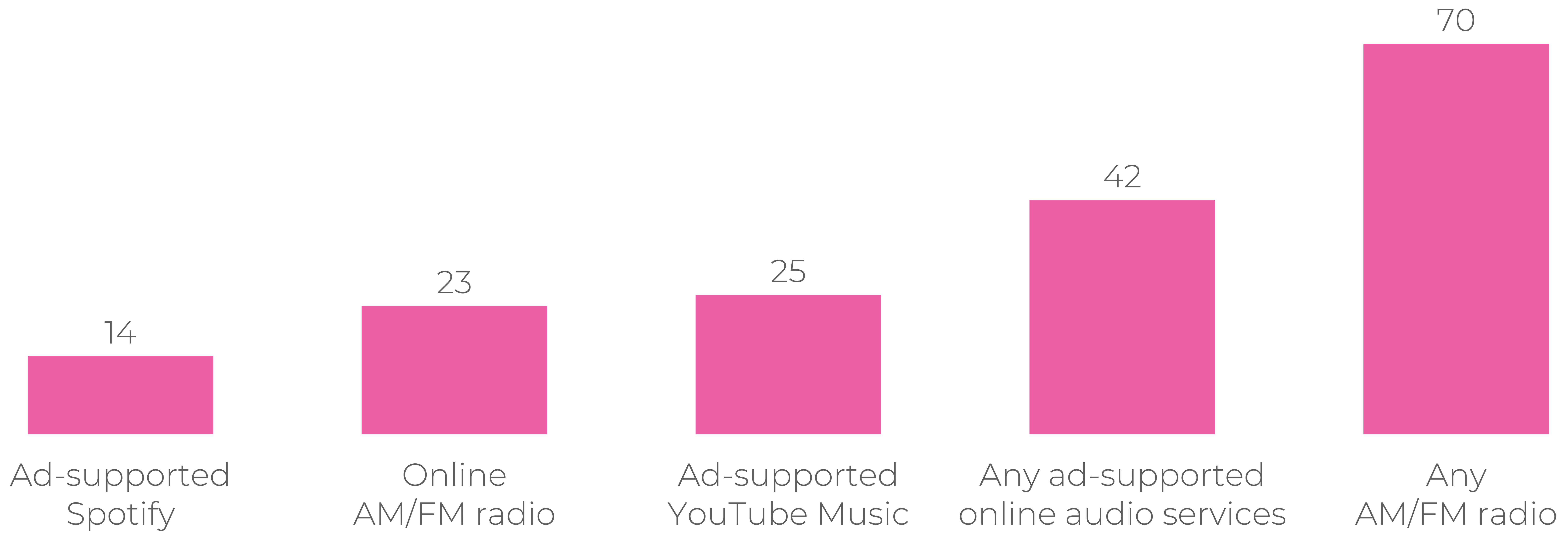


Weekly Listening to Ad-Supported Audio

Radio remains far and away the dominant listening channel in terms of reach

TOTAL NEW ZEALAND POPULATION 16+ (N=1,105)

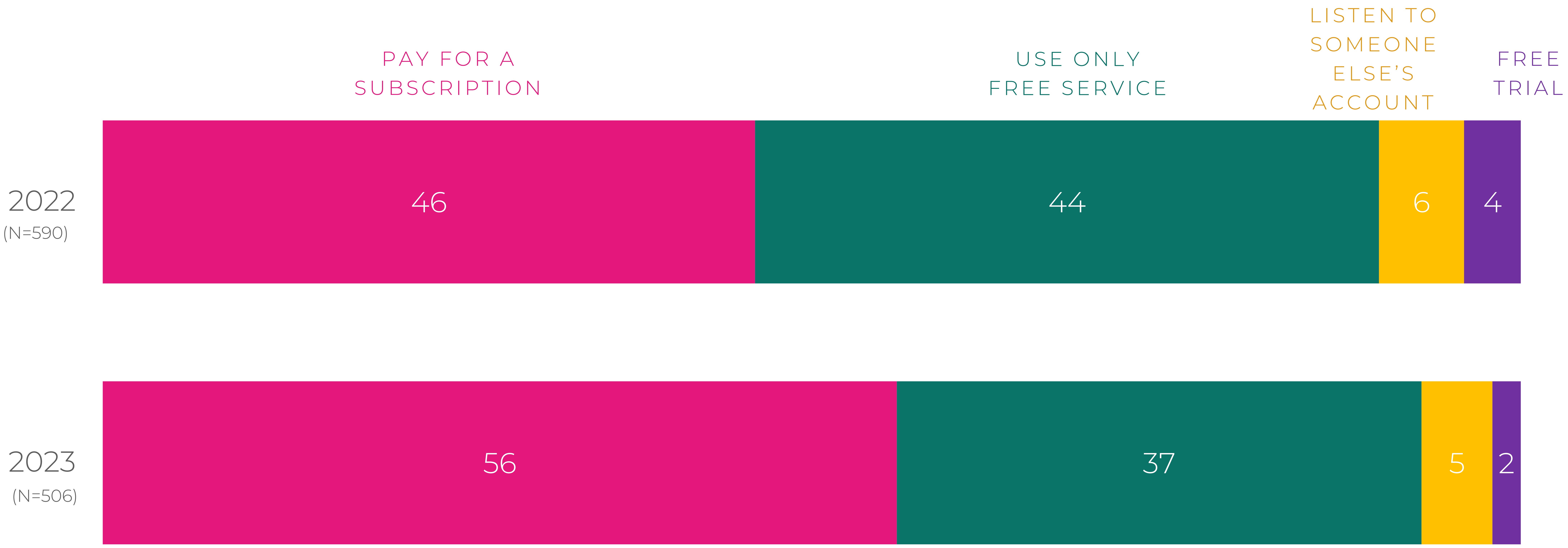
% LISTENED AUDIO SOURCE IN LAST WEEL



Free vs. Paid Subscriptions to Spotify

Significant growth in number of those using Spotify premium

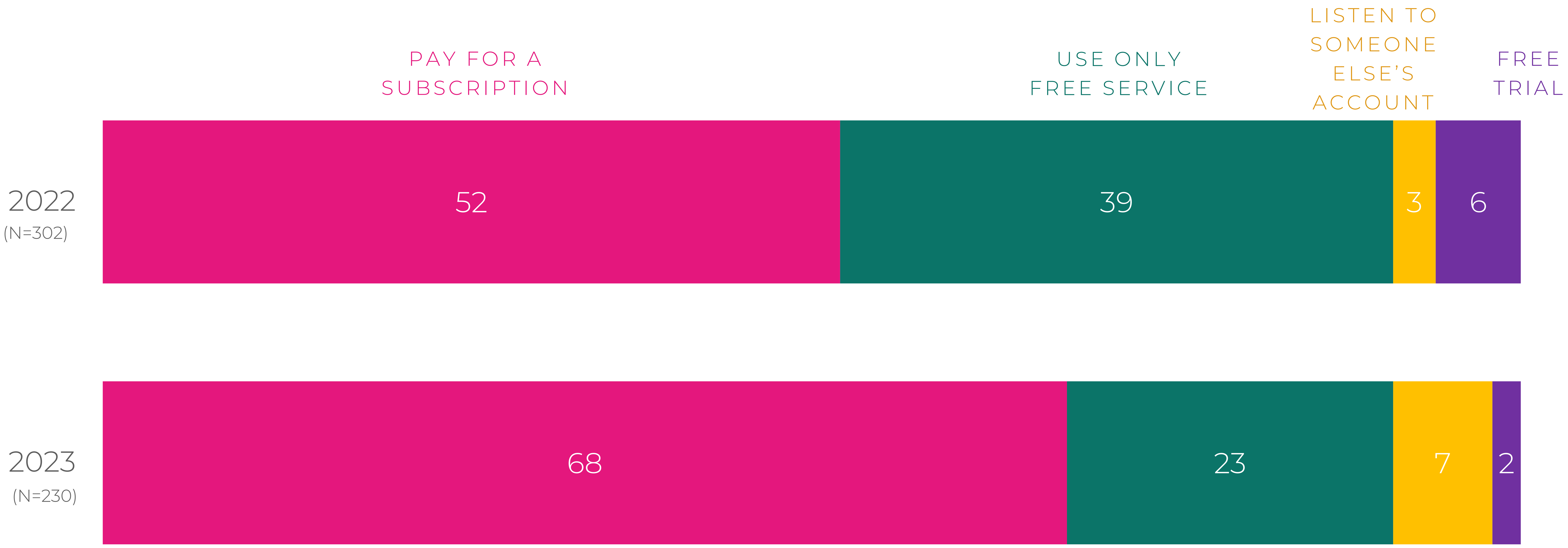
BASE: NEW ZEALAND 16+ AND LISTENED TO SPOTIFY IN LAST MONTH



Free vs. Paid Subscriptions to Spotify (Age 16-34)

This is especially evident at younger end where 7 in 10 can not be reached with an ad

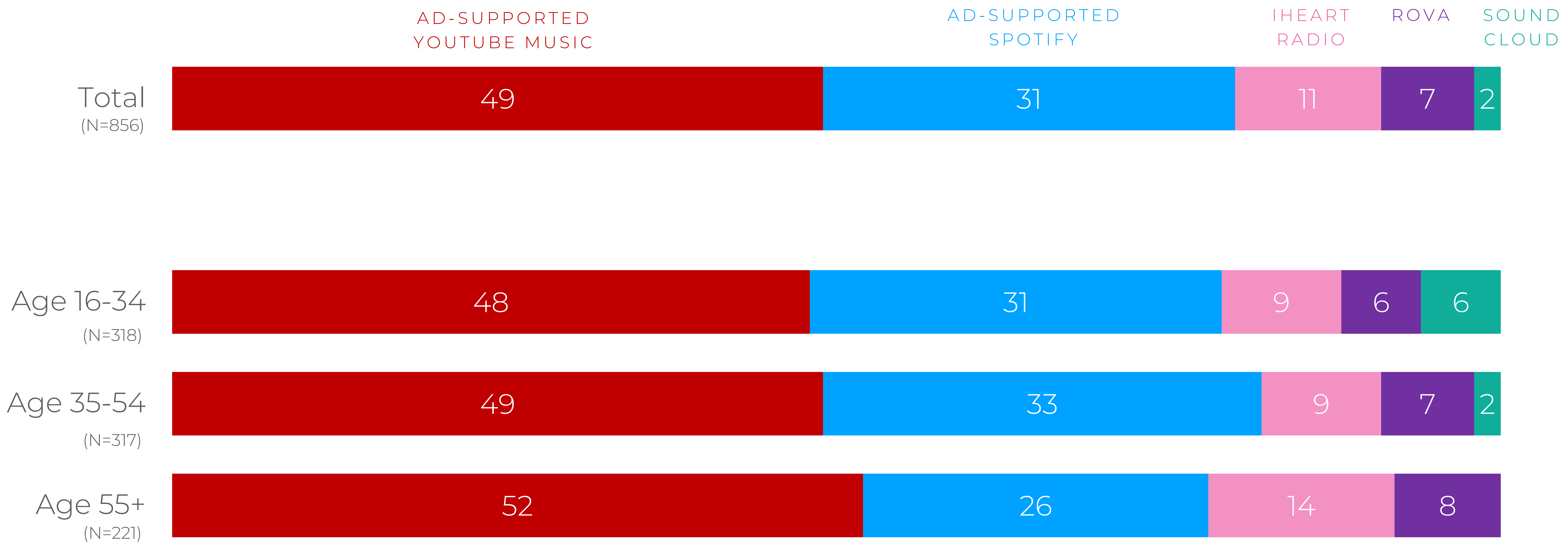
BASE: NEW ZEALAND 16-34 AND LISTENED TO SPOTIFY IN LAST MONTH



Ad-Supported Audio Platform Used Most Often

Local platforms represent nearly 20% of ad-supported platforms used most often

BASE: NEW ZEALAND POPULATION 16+ AND EVER LISTEN TO ONLINE AUDIO



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Podcasting

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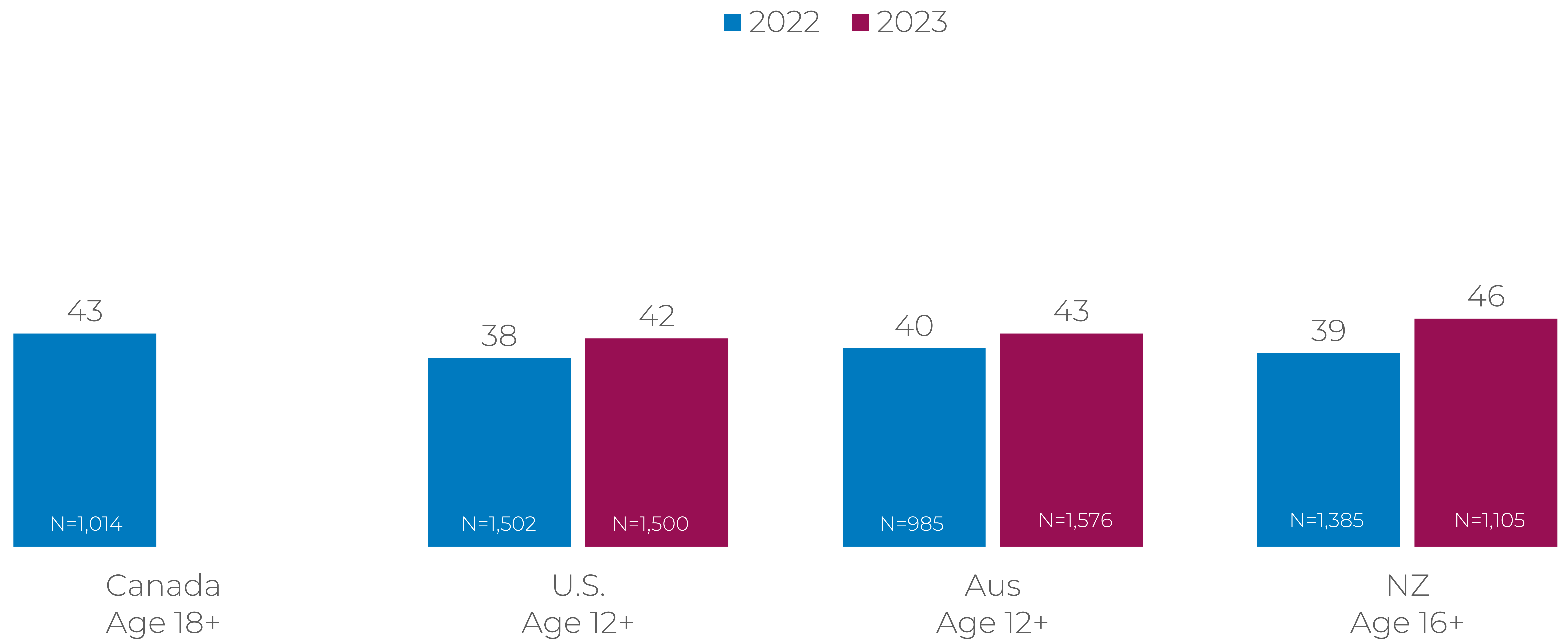
Monthly Podcast Listening

Aotearoa leads the world in monthly podcast listening

TOTAL POPULATIONS

% LISTENED TO A PODCAST IN LAST MONTH



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Monthly Podcast Listening

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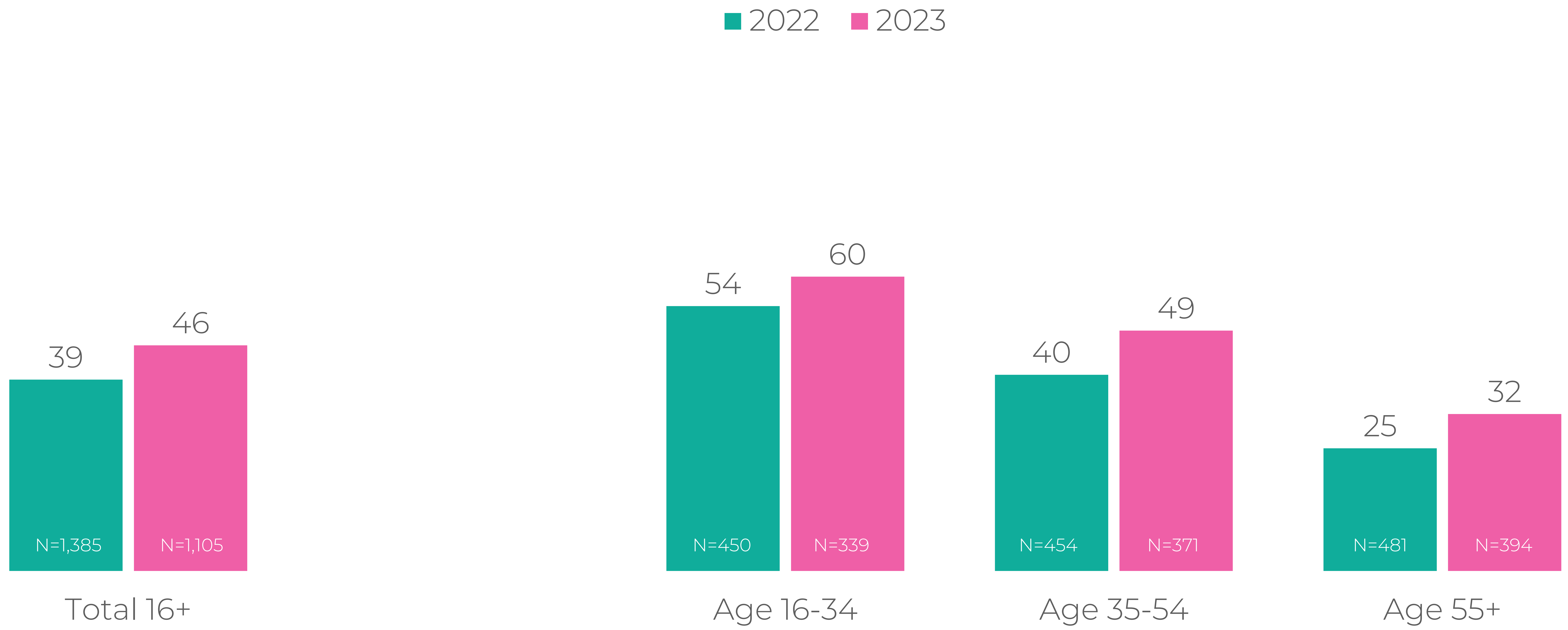
Listening is driven by younger listeners but with consistent growth across all the age ranges

TOTAL NEW ZEALAND POPULATION 16+

% LISTENED TO A PODCAST IN LAST MONTH



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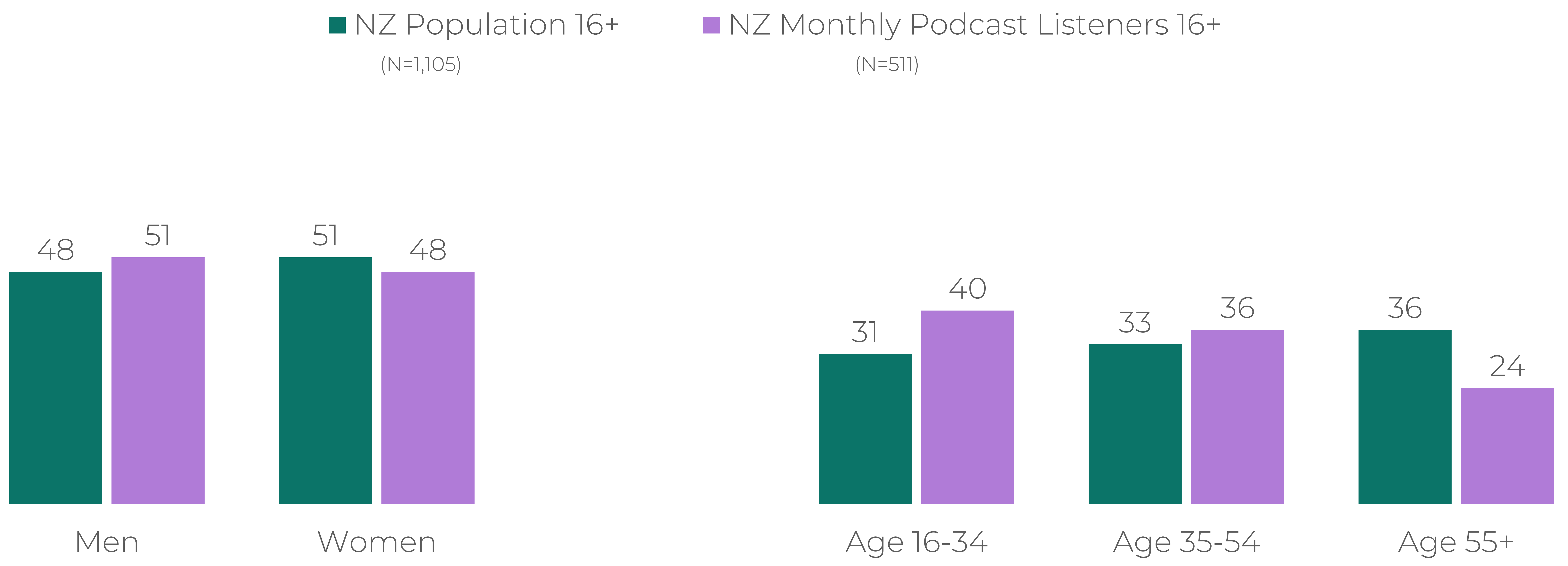
Composition of Monthly Podcast Listeners

Podcasts are creating opportunities for harder to reach audiences

% LISTENED TO A PODCAST IN LAST MONTH



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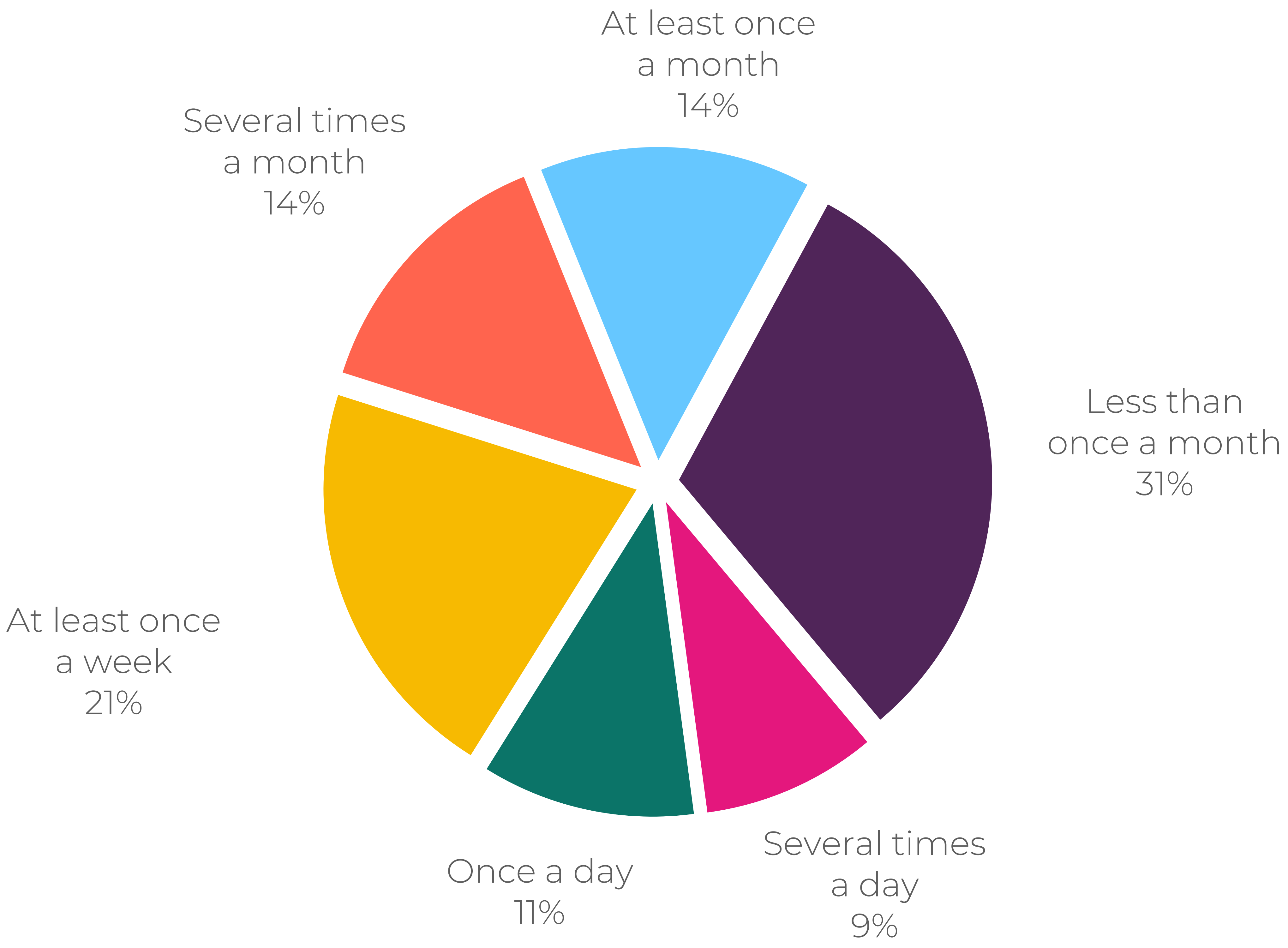
Frequency of Listening to Podcasts

7 in 10 podcast listeners access a podcast at least monthly, with 40% weekly

BASE: NEW ZEALAND POPULATION 16+ AND EVER LISTENED TO A PODCAST; 71% (N=780)



With weekly podcast listeners averaging

five podcast episodes

in the last week

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Smart Speakers

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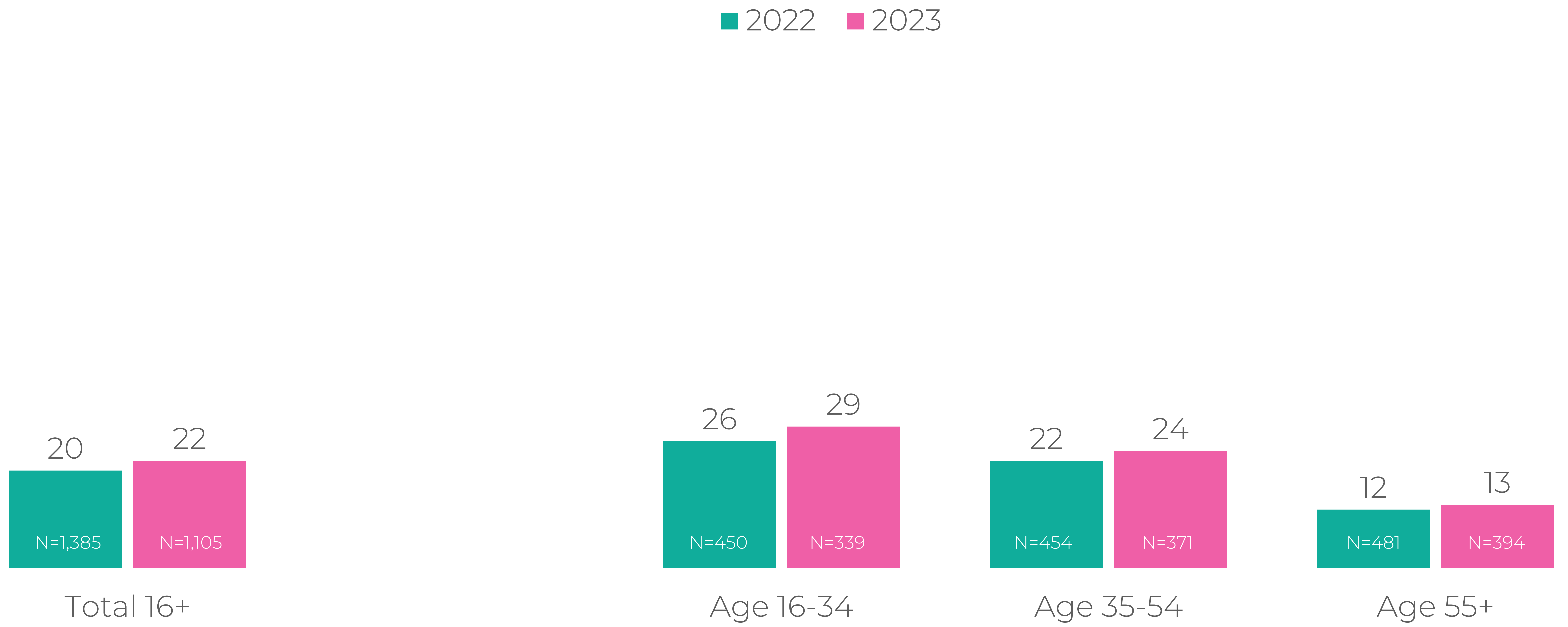
Smart Speaker Ownership

Nearly one-third of younger age group now owns a smart speaker, with overall ownership continuing to grow

TOTAL NEW ZEALAND POPULATION 16+

% OWNING A SMART SPEAKER



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Weekly Media Consumption

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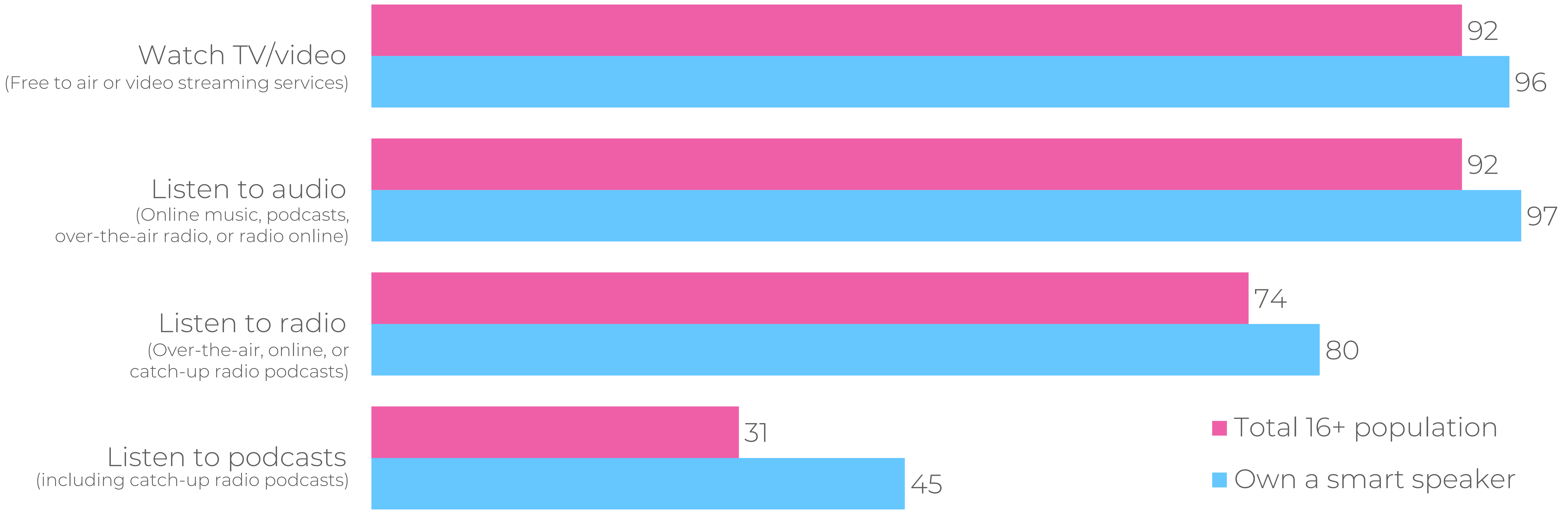
Technology adoption clearly triggers an increase in consumption

TOTAL NEW ZEALAND POPULATION 16+ (N=1,105)

% DOING ACTIVITY IN THE LAST WEEK



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In Car

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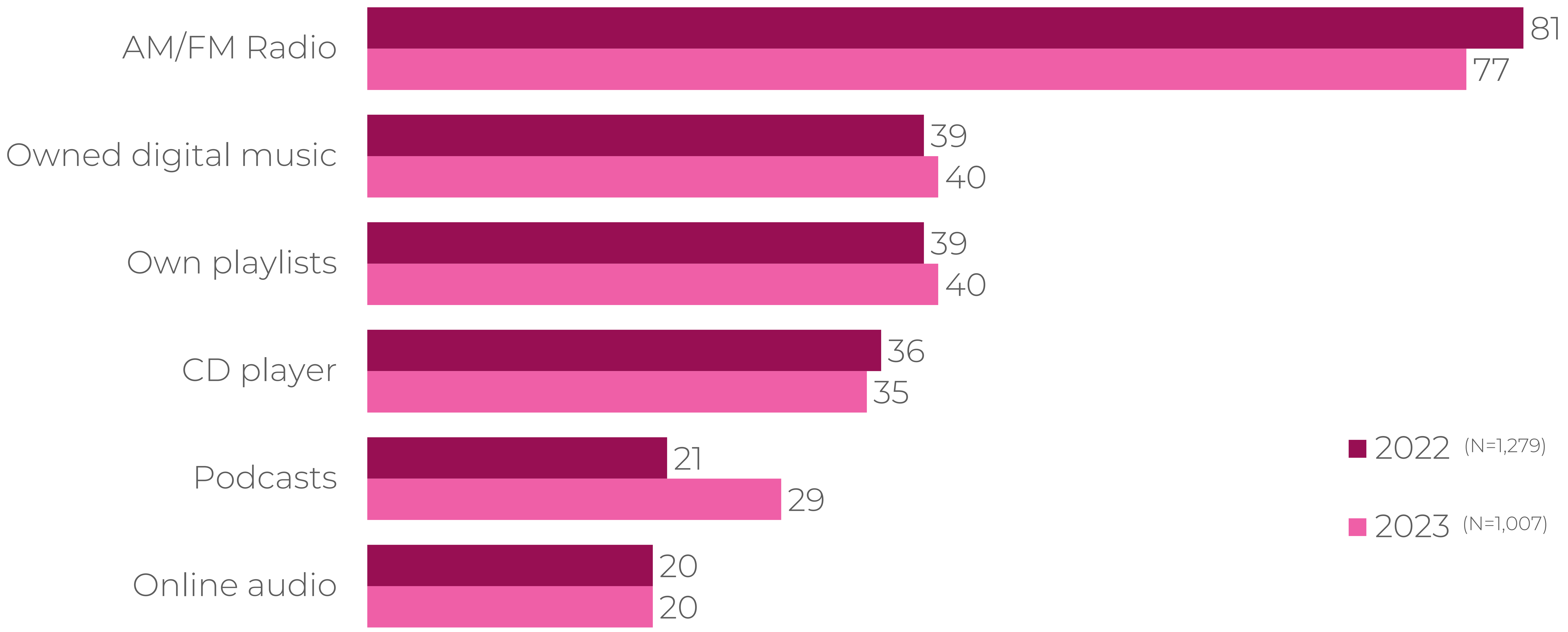
Audio Sources Currently Ever Used in Car

In car remains dominated by radio listening whilst we see some growth in Podcast

BASE: NEW ZEALAND AGE 16+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH

% USING AUDIO SOURCE IN CAR



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Audio Sources Currently Ever Used in Car

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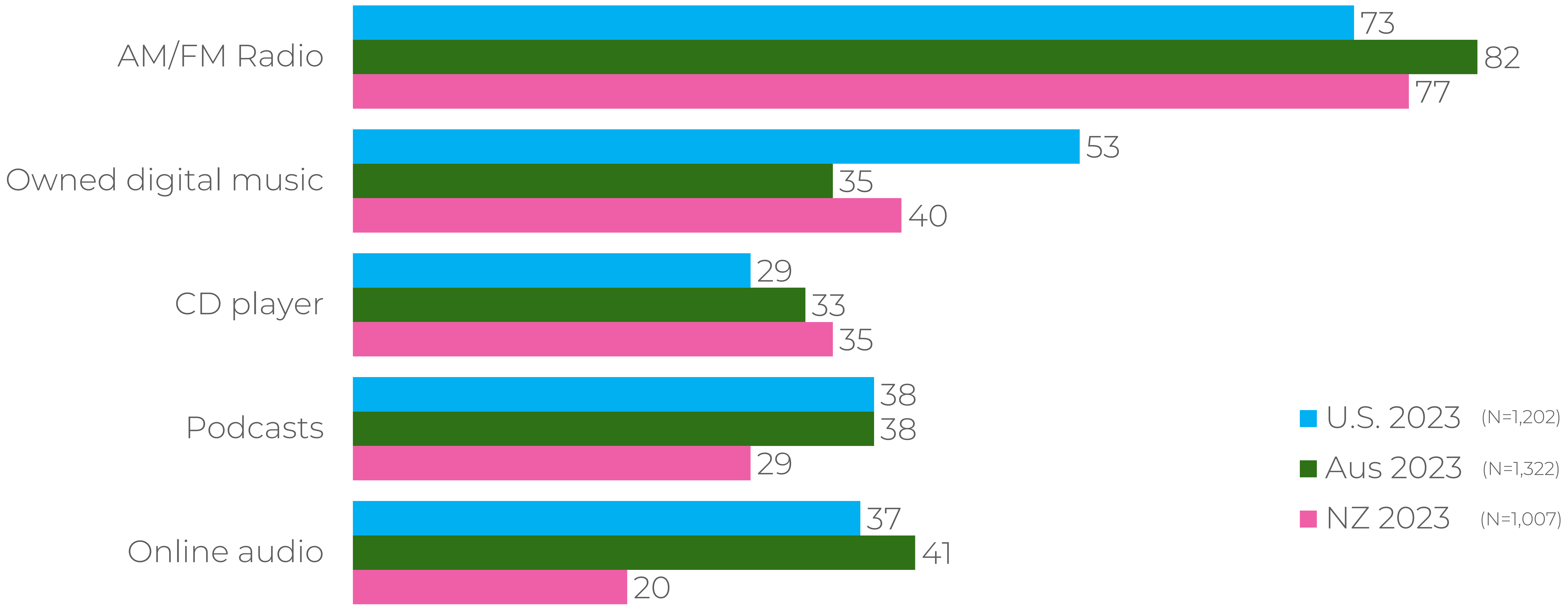
NZ demonstrates generally lower adoption of new formats in car, potentially driven by age of care fleet, data cost and lower commute times

BASE: HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH

% USING AUDIO SOURCE IN CAR



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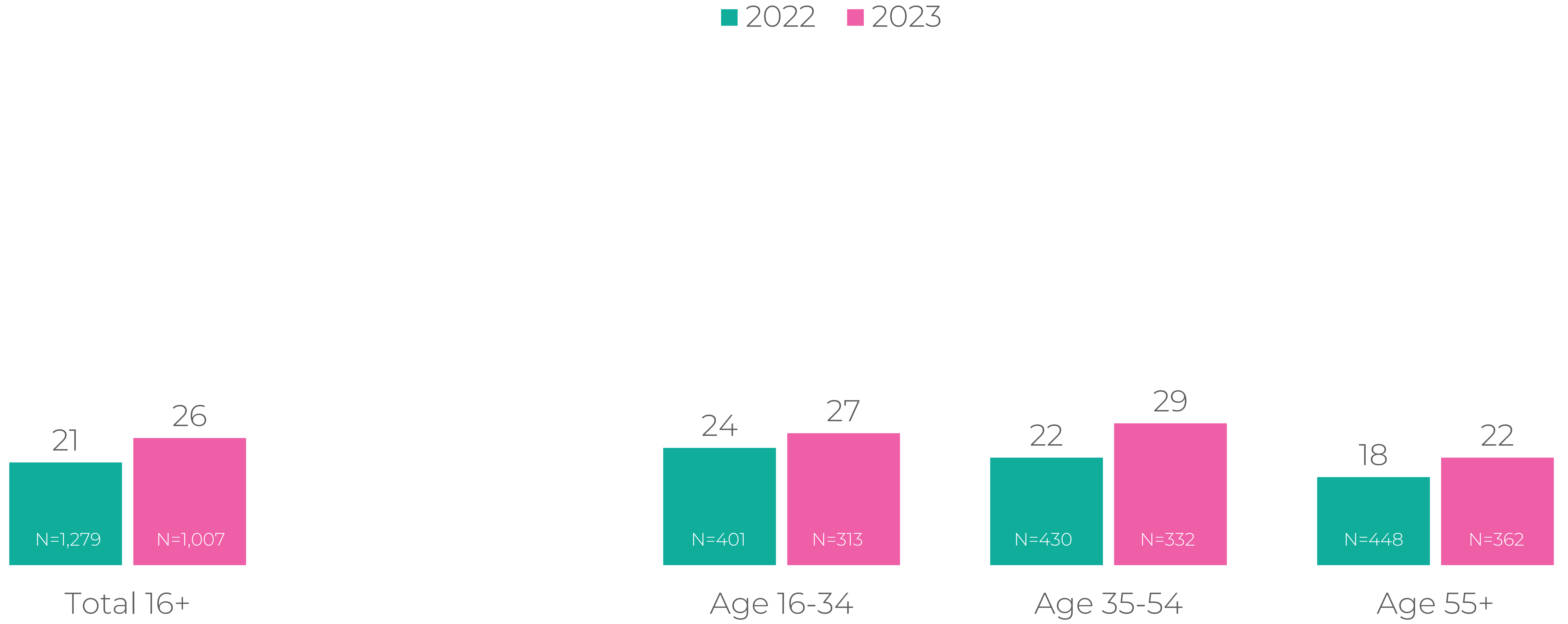
Have Apple CarPlay or Android Auto in Car

Steady growth in car-based connectivity

BASE: NEW ZEALAND AGE 16+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 91%

% HAVE APPLE CARPLAY OR ANDROID AUTO IN PRIMARY VEHICLE



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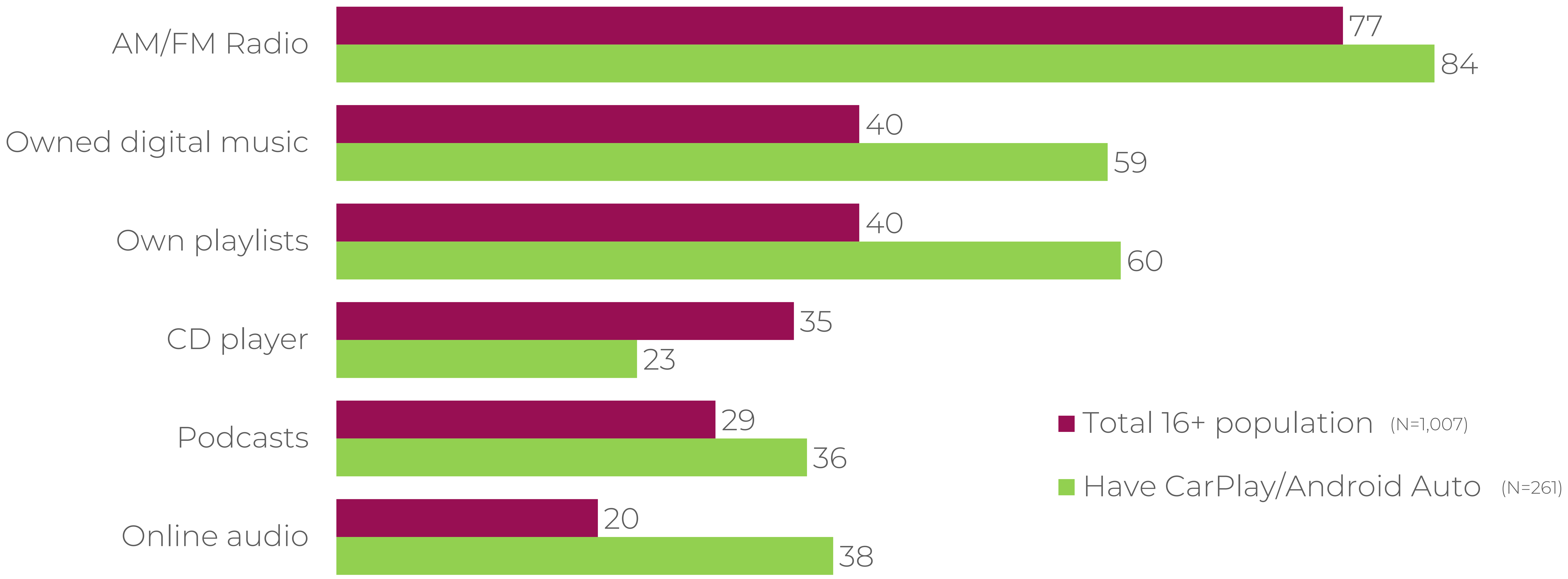
Have Apple CarPlay or Android Auto in Car

Enhanced connectivity is driving significant change in audio listening in the car

BASE: NEW ZEALAND AGE 16+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH

% USING AUDIO SOURCE IN CAR



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Summary and observations

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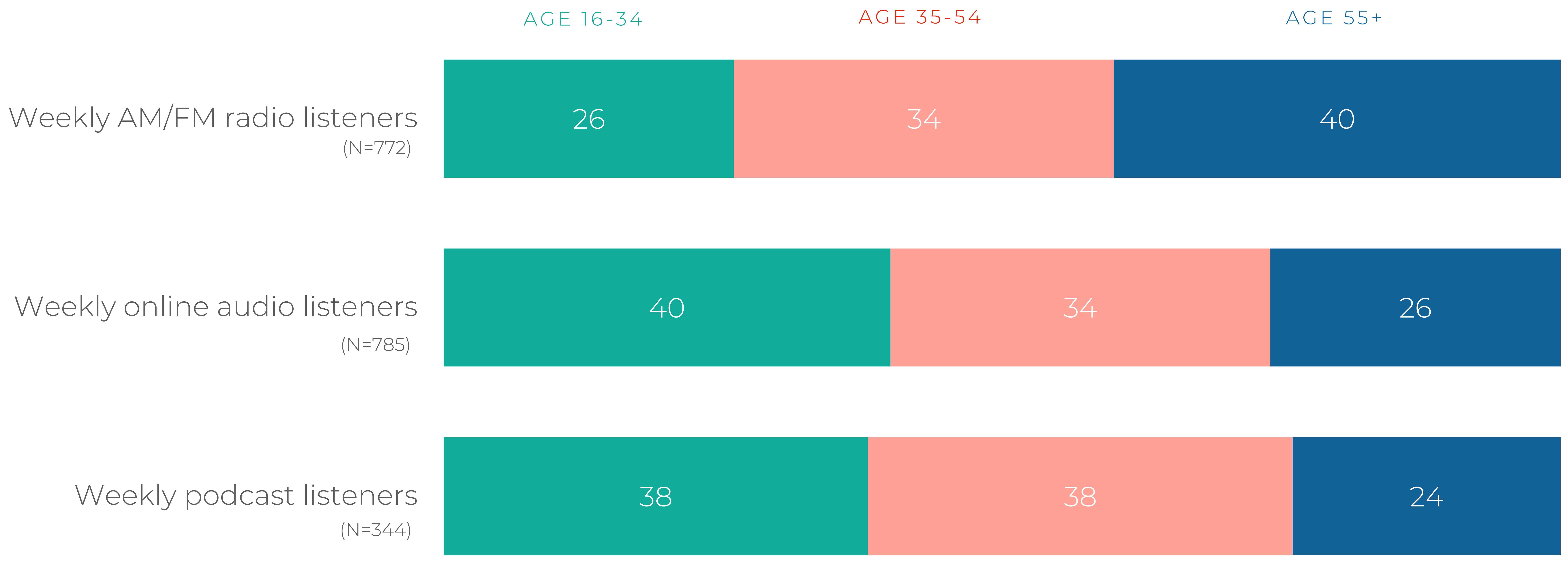
Age Composition of Weekly Media Consumers

Demonstrates the opportunity in new points of listening to reach younger consumers

BASE: NEW ZEALAND POPULATION 16+ CONSUMING MEDIA IN LAST WEEK



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Observations

When looking across all platforms, audio maintains high levels of listening for all audiences

Consider a total portfolio approach to your audio planning

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Observations

Whilst Spotify leads online audio, when looking at commercial audience on the platform the picture is very different

Audio planning should be considered in context of ad supported audiences

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Observations

New Zealand leads the world in monthly podcast consumption

There is untapped opportunities for brands

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Observations

AM/FM radio is still king in the car

If you want to reach commuters or in car audiences radio remains essential

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Observations

Technology is clearly creating higher levels of audio consumption

As adoption continues we expect audio consumption to continue to grow

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Observations

Audio maintains a strong consumption base with ongoing growth in points of listening

It continues to provide a wide range of effective advertising solutions with new opportunities abundant

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