

 THE INFINITE DIAL® 2019

The Infinite Dial 2019

#InfiniteDial



#InfiniteDial

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Study Overview

- ▶ The Infinite Dial is the longest-running survey of digital media consumer behavior in America
- ▶ The annual reports in this series have covered a wide range of digital media and topics since 1998
- ▶ The Infinite Dial tracks mobile behaviors, internet audio, podcasting, social media, smart speakers and more

Study Methodology

- ▶ In January/February 2019, Edison Research conducted a national telephone survey of 1500 people aged 12 and older, using random digit dialing techniques to both cell phones and landlines
- ▶ Survey offered in both English and Spanish
- ▶ Data weighted to national 12+ U.S. population figures

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Social Media



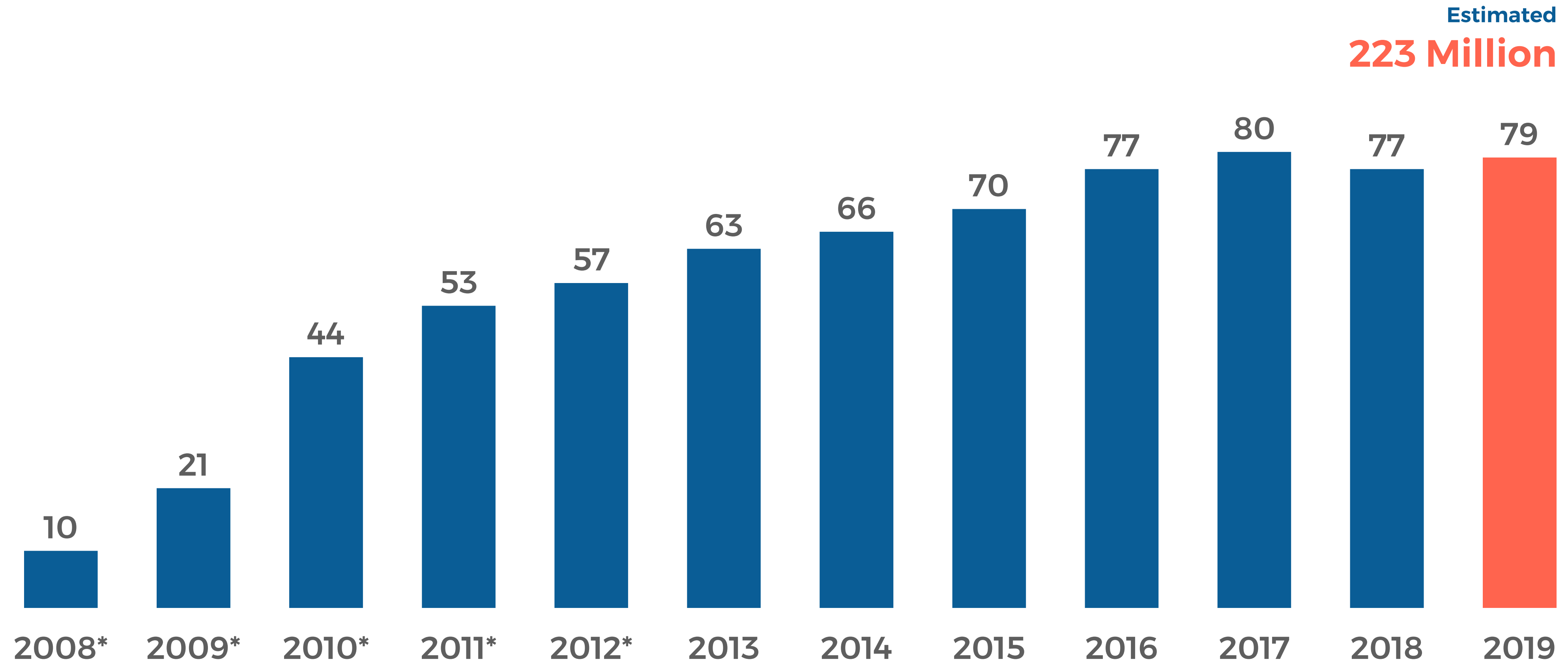
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Social Media Usage

TOTAL U.S. POPULATION 12+

% USING SOCIAL MEDIA



*2008-2012: EVER USE FACEBOOK, TWITTER, OR LINKEDIN

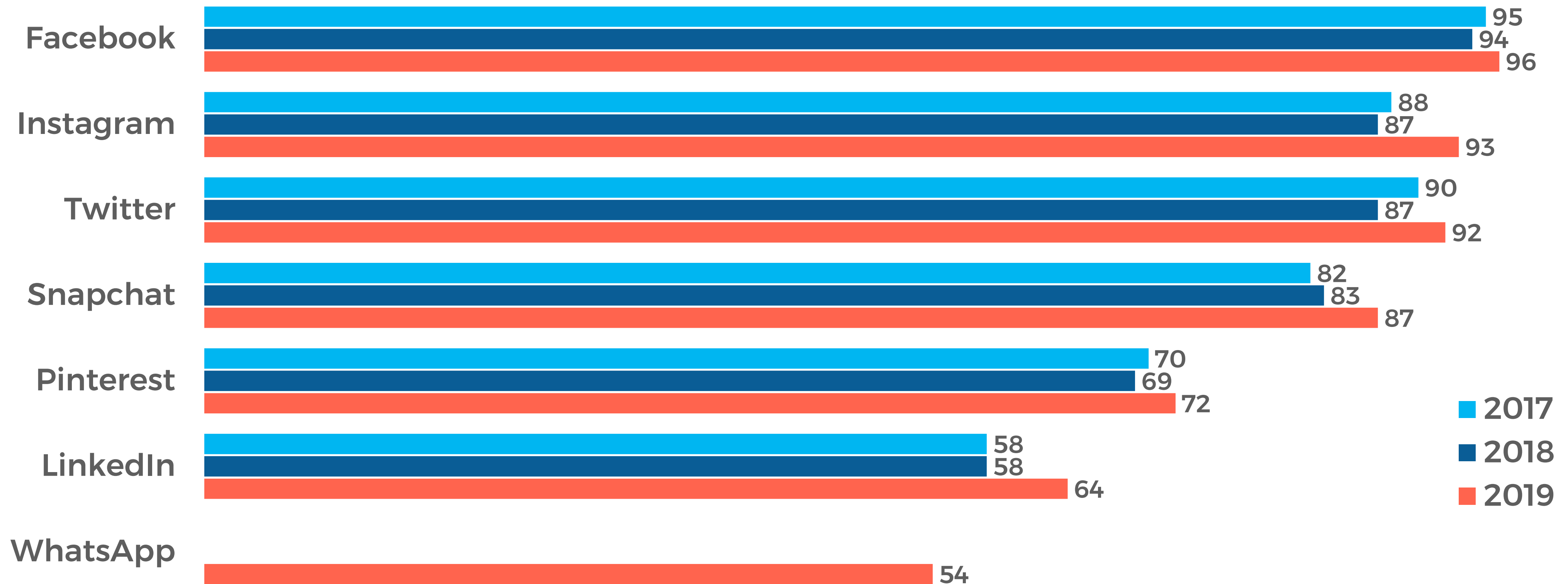


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Social Media Brand Awareness

TOTAL U.S. POPULATION 12+

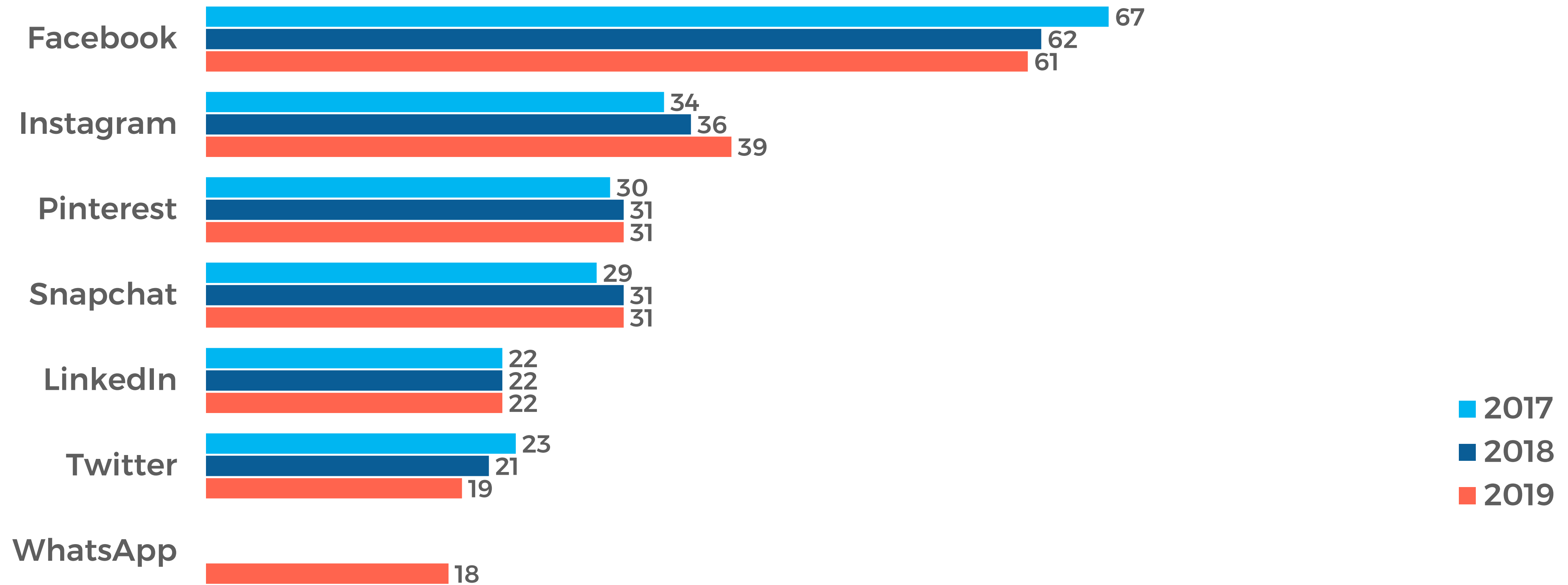
% AWARE OF SOCIAL MEDIA BRAND



Social Media Brand Usage

TOTAL U.S. POPULATION 12+

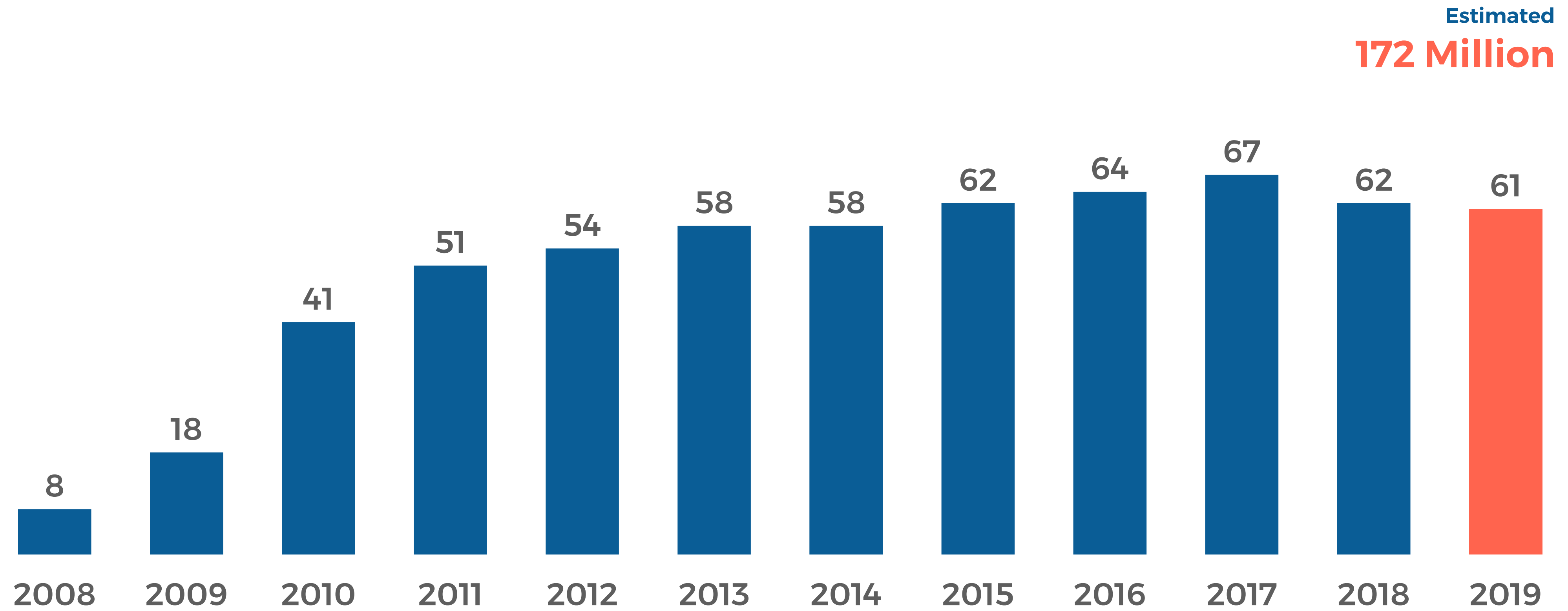
% USING SOCIAL MEDIA BRAND



Facebook Usage

TOTAL U.S. POPULATION 12+

% USING FACEBOOK



There are an estimated

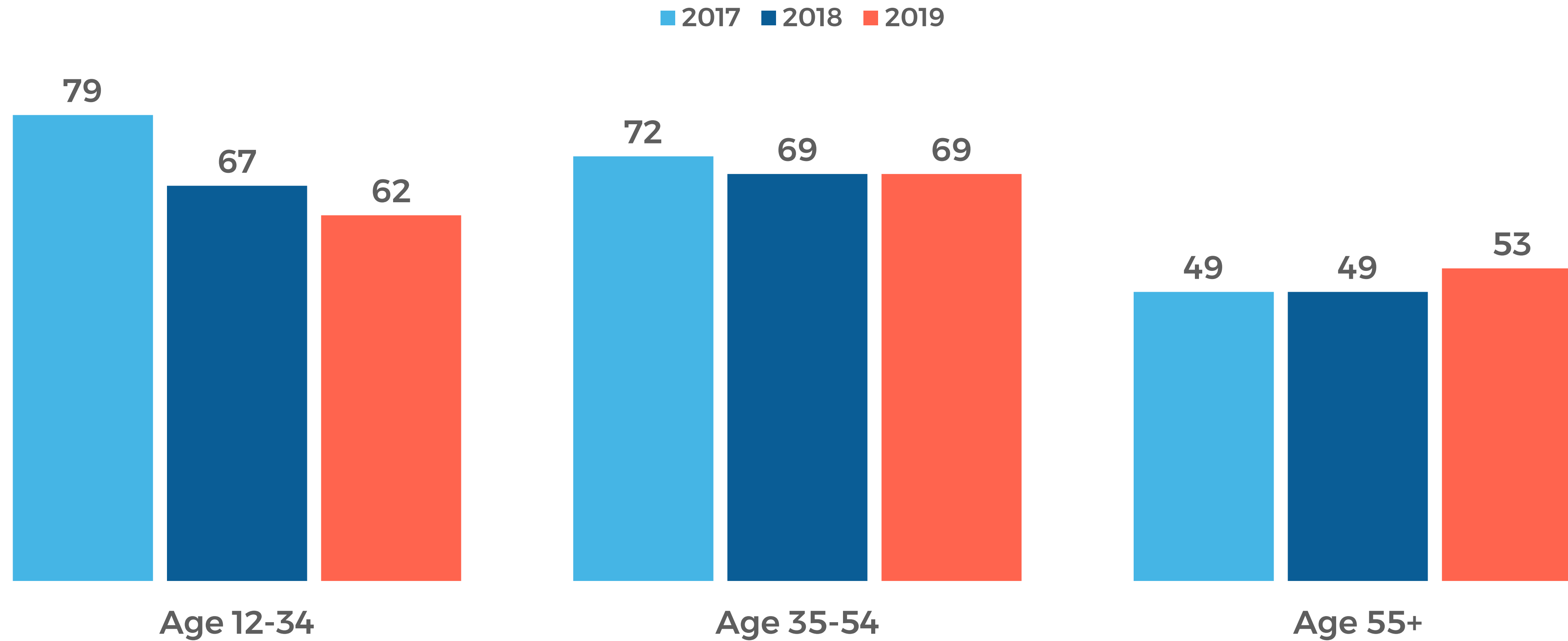
15 Million

fewer Facebook users in the U.S. today than in 2017

Facebook Usage

U.S. POPULATION

% USING FACEBOOK



Estimated

82 Million

12-34 year olds in the U.S.
used Facebook in 2017

Estimated

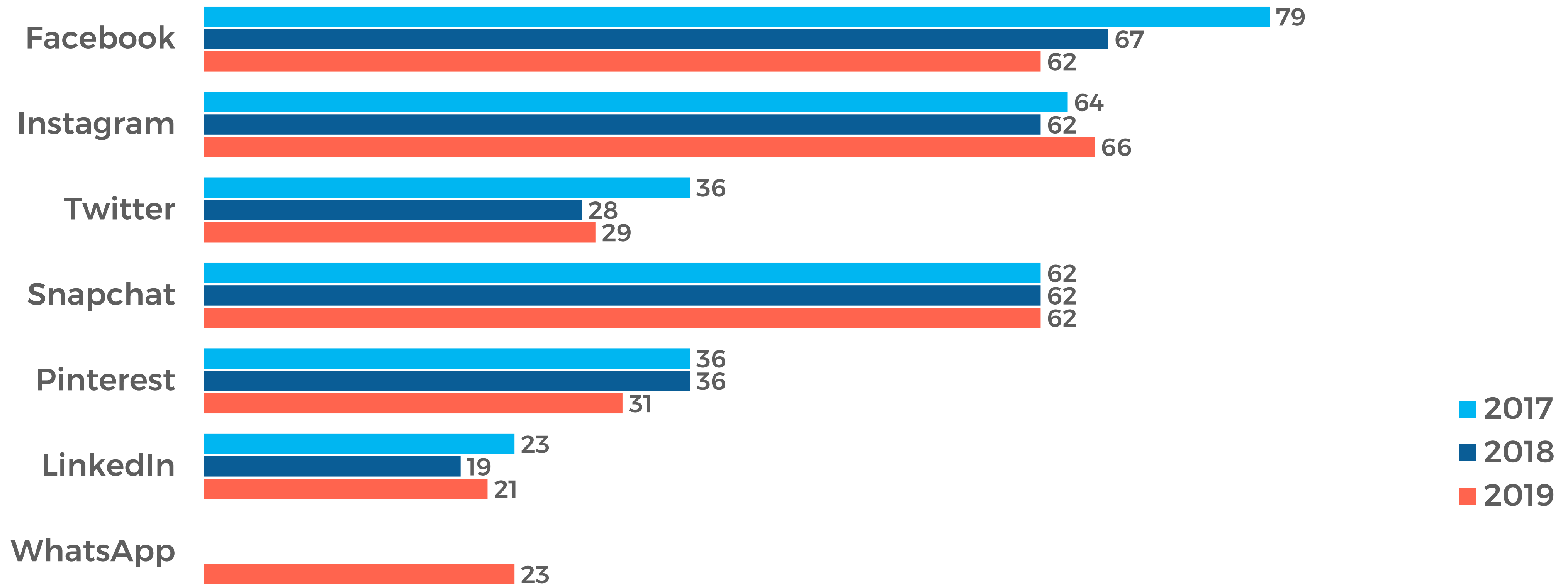
65 Million

12-34 year olds in the U.S.
use Facebook today

Social Media Brand Usage (Age 12-34)

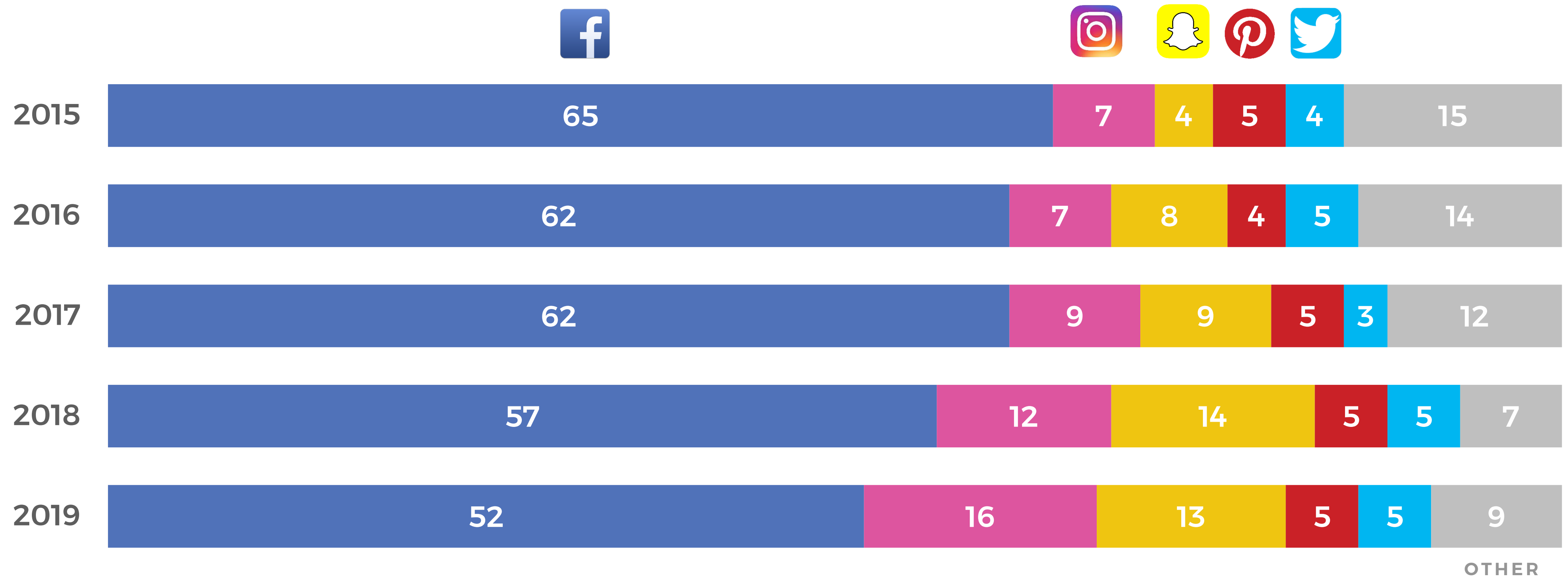
U.S. POPULATION

% USING SOCIAL MEDIA BRAND



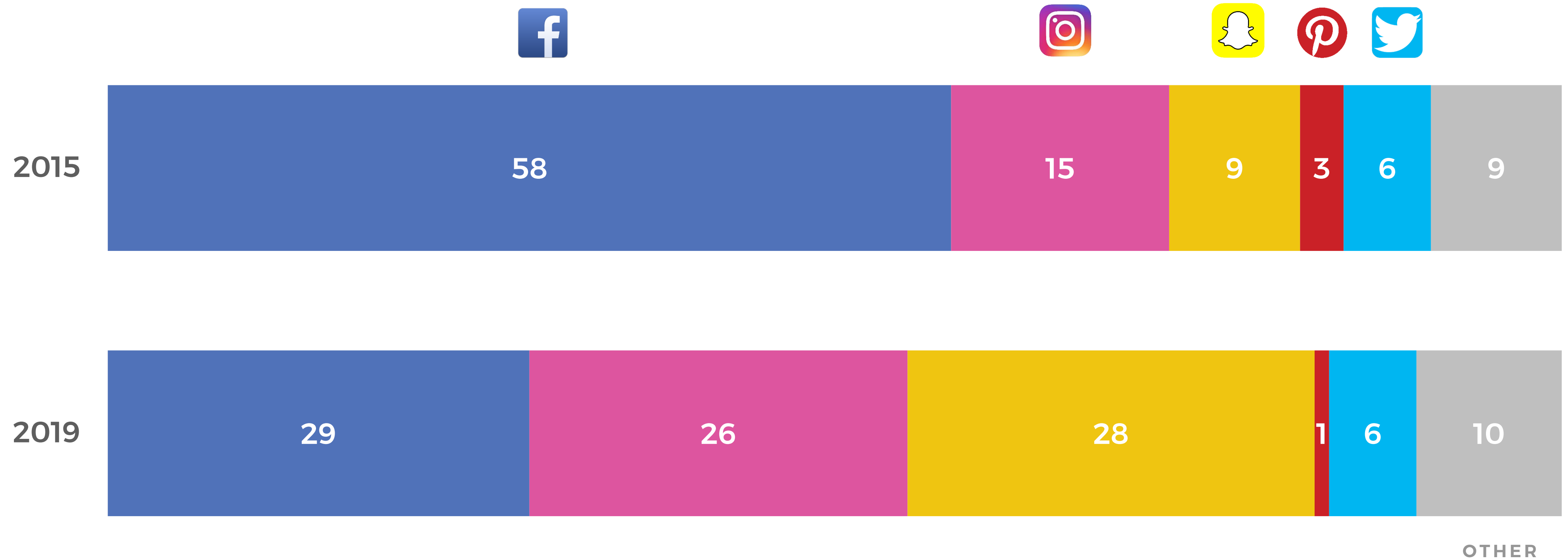
Social Media Brand Used Most Often

BASE: U.S. AGE 12+ SOCIAL MEDIA USERS



Social Media Brand Used Most Often (Age 12-34)

BASE: U.S. SOCIAL MEDIA USERS



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Media & Technology



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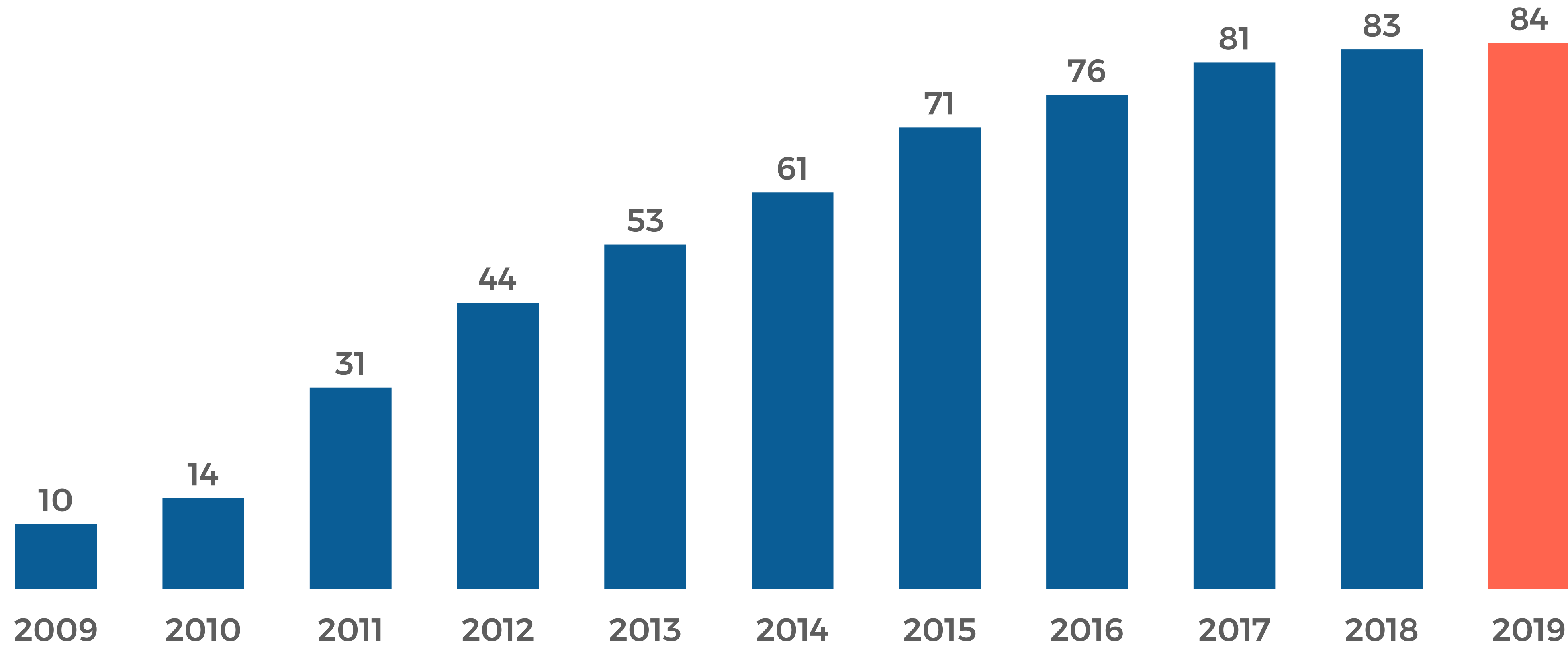
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Smartphone Ownership

TOTAL U.S. POPULATION 12+

% OWNING A SMARTPHONE

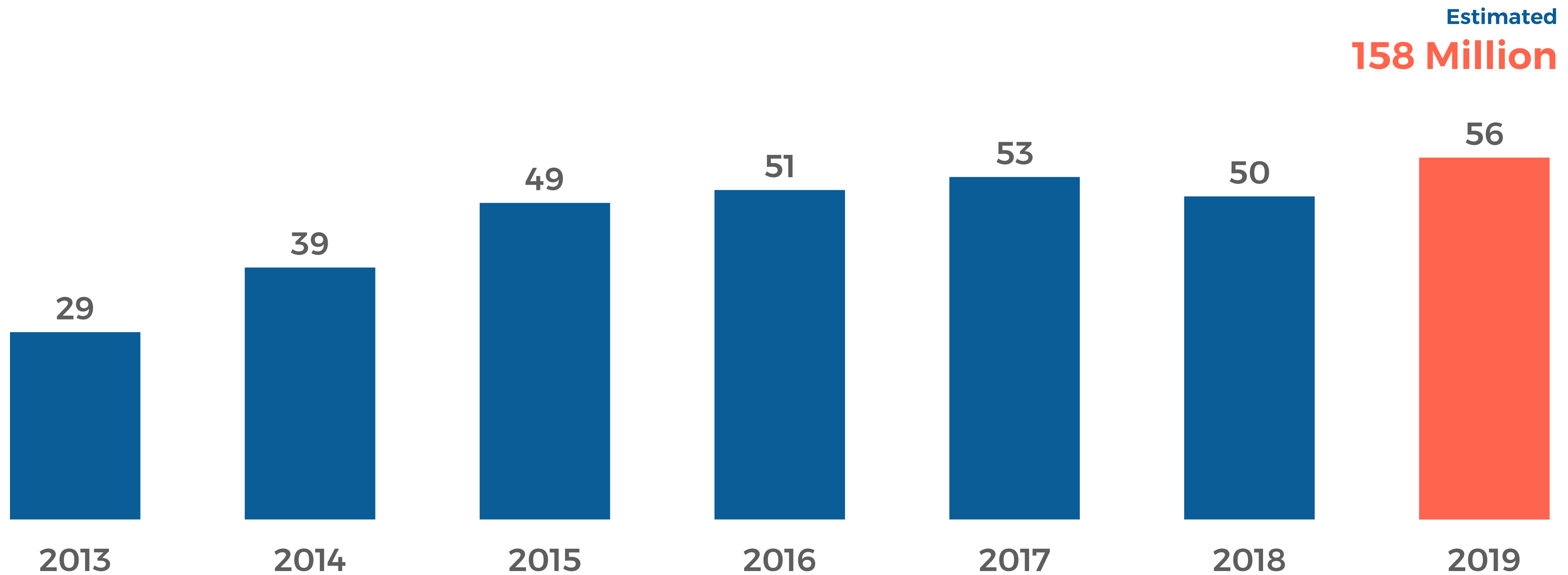
Estimated
237 Million



Tablet Ownership

TOTAL U.S. POPULATION 12+

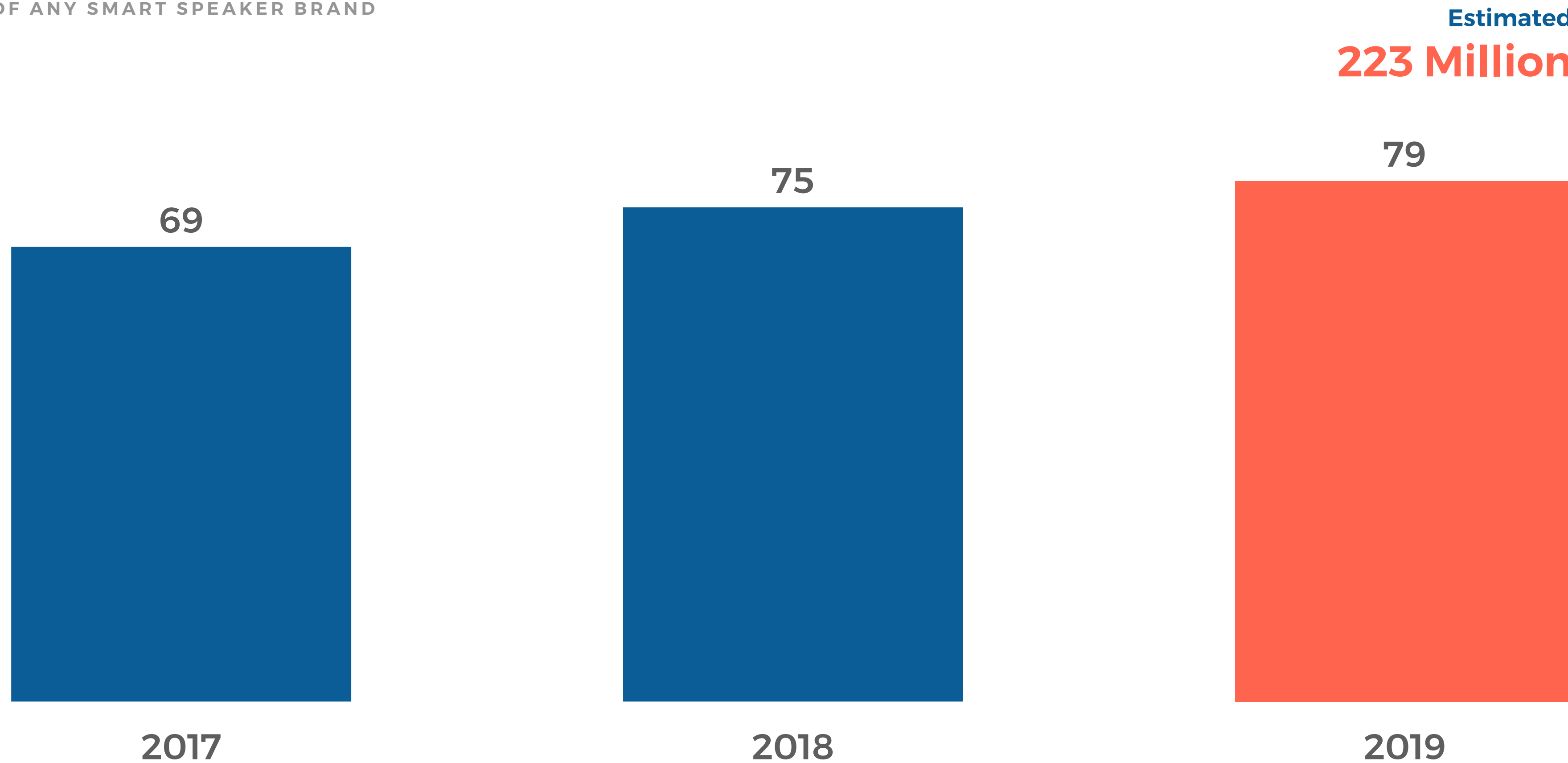
% OWNING A TABLET



Smart Speaker Awareness

TOTAL U.S. POPULATION 12+

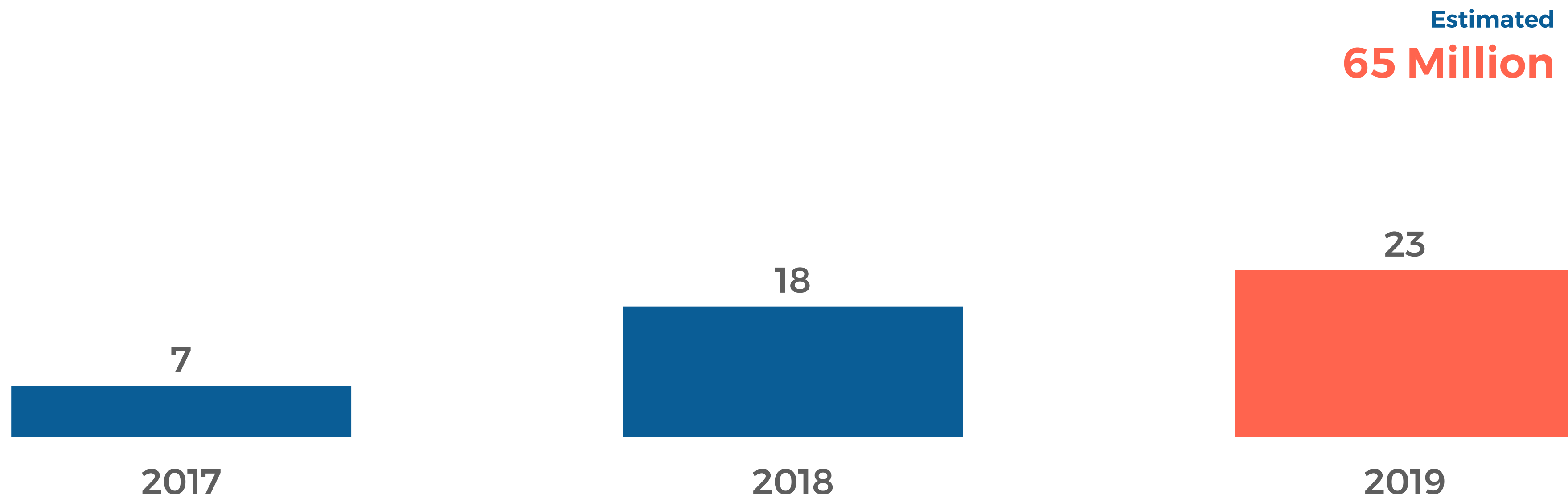
% AWARE OF ANY SMART SPEAKER BRAND



Smart Speaker Ownership

TOTAL U.S. POPULATION 12+

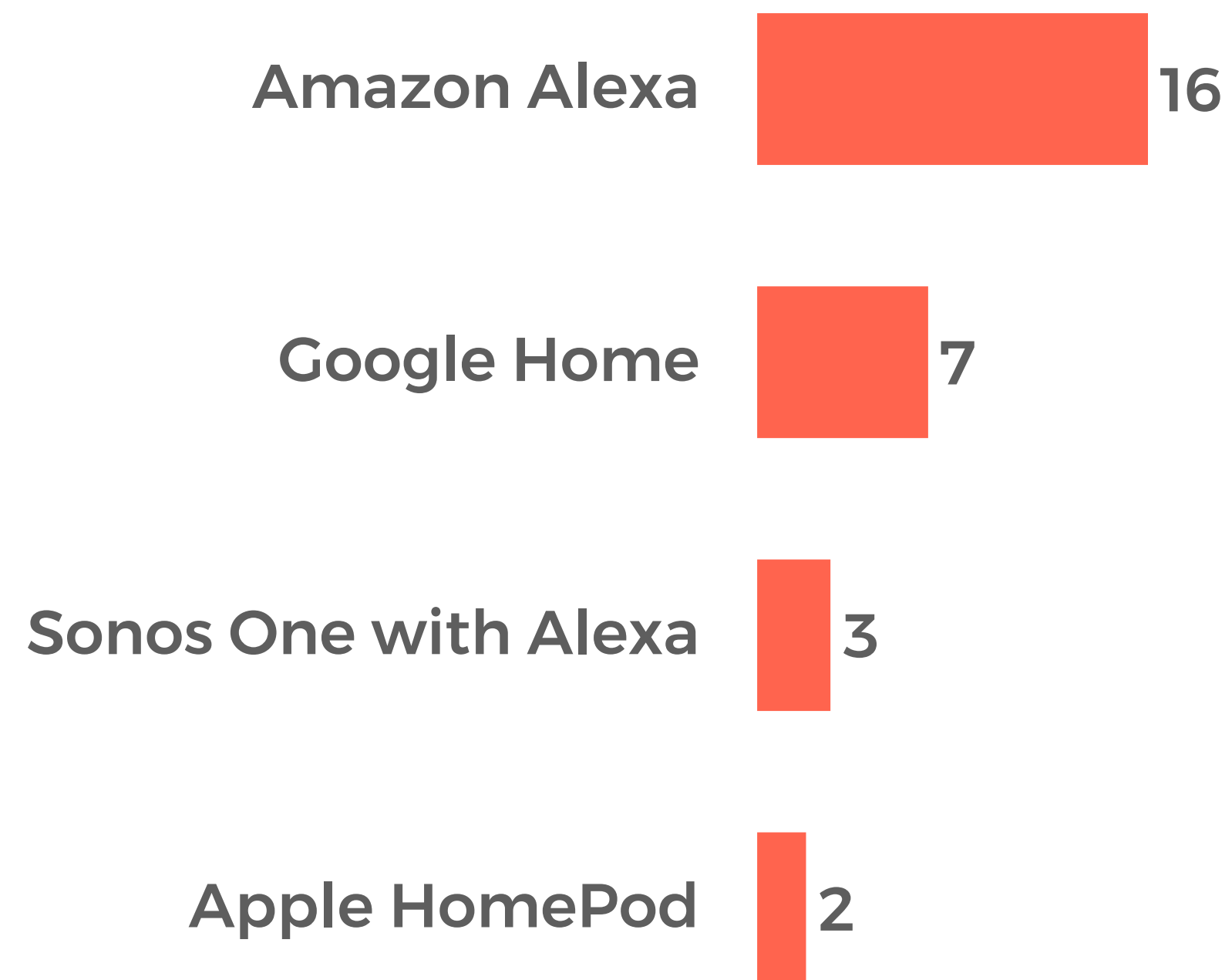
% OWNING A SMART SPEAKER



Smart Speaker Ownership

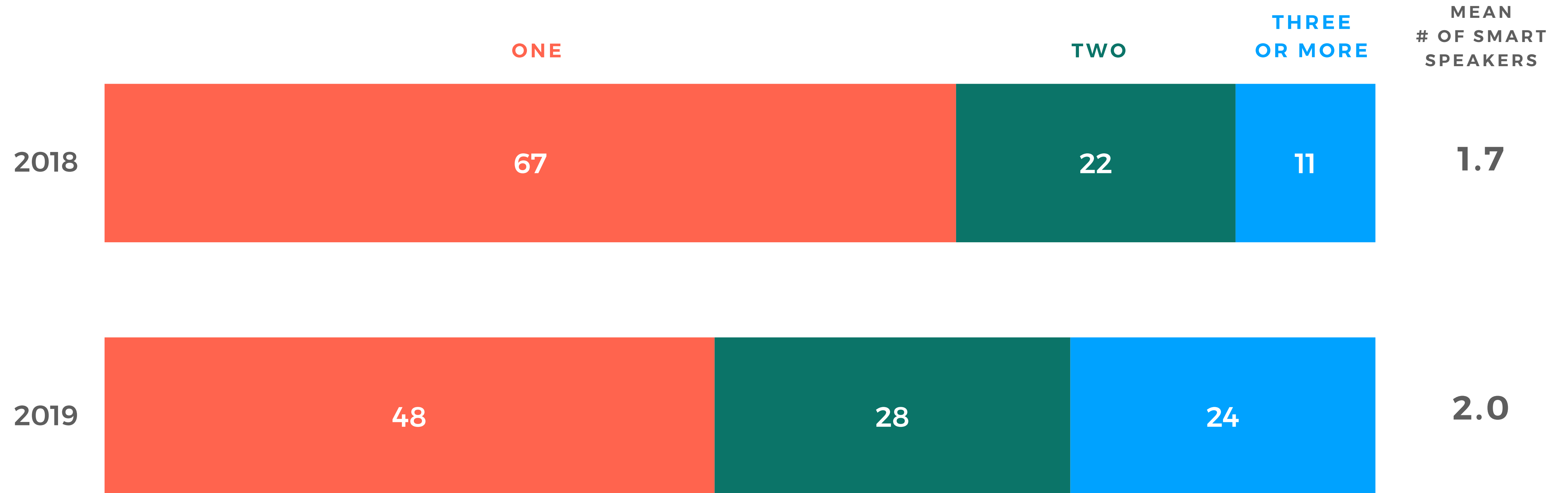
TOTAL U.S. POPULATION 12+

% OWNING SMART SPEAKER



Number of Smart Speakers in Household

BASE: U.S. AGE 12+ SMART SPEAKER OWNERS



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Online Audio



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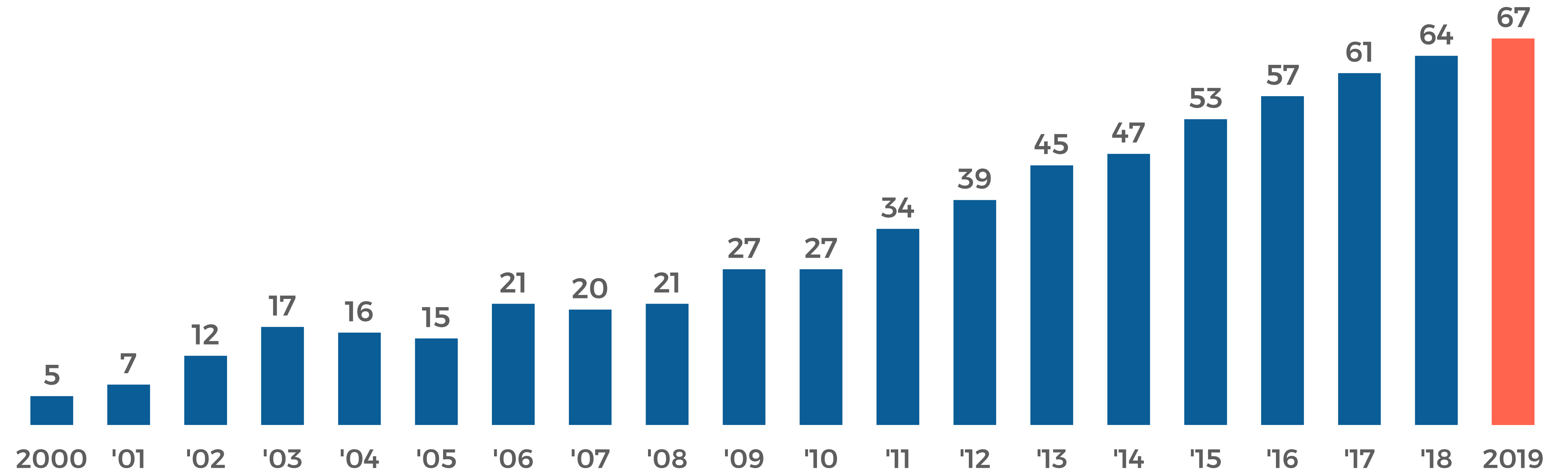
Monthly Online Audio Listening

TOTAL U.S. POPULATION 12+

% 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

Estimated
189 Million

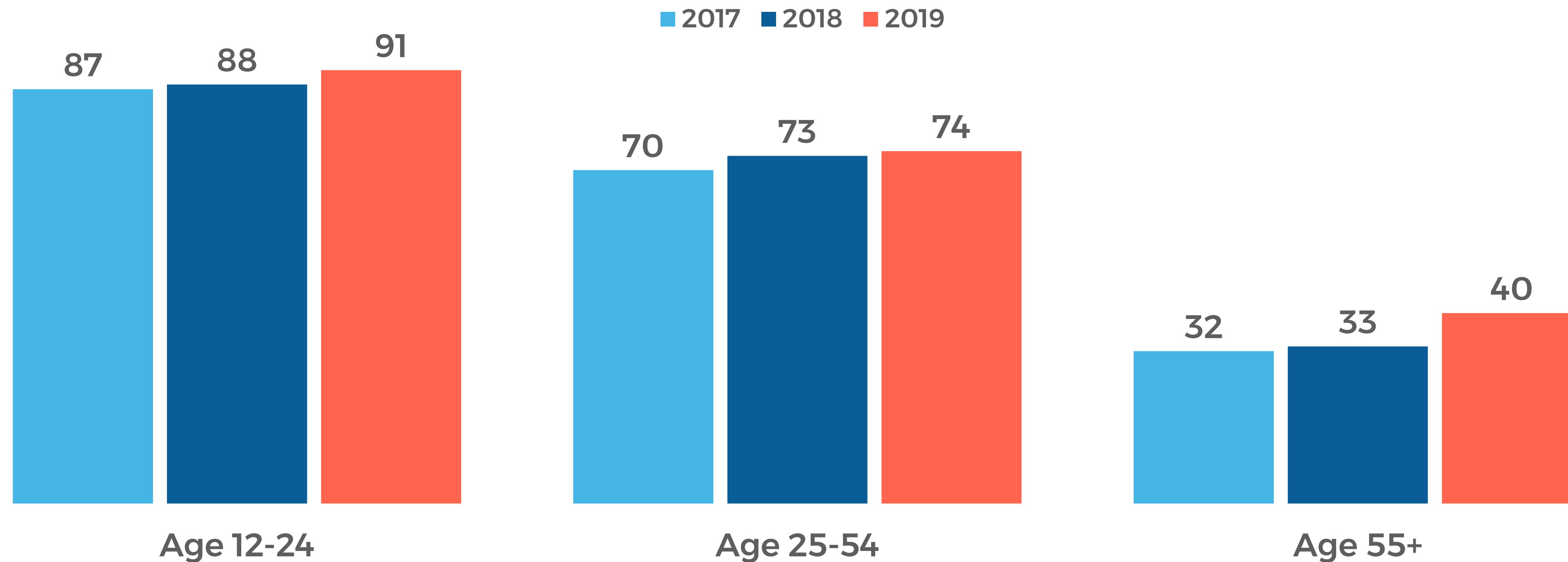


Monthly Online Audio Listening

U.S. POPULATION

% 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

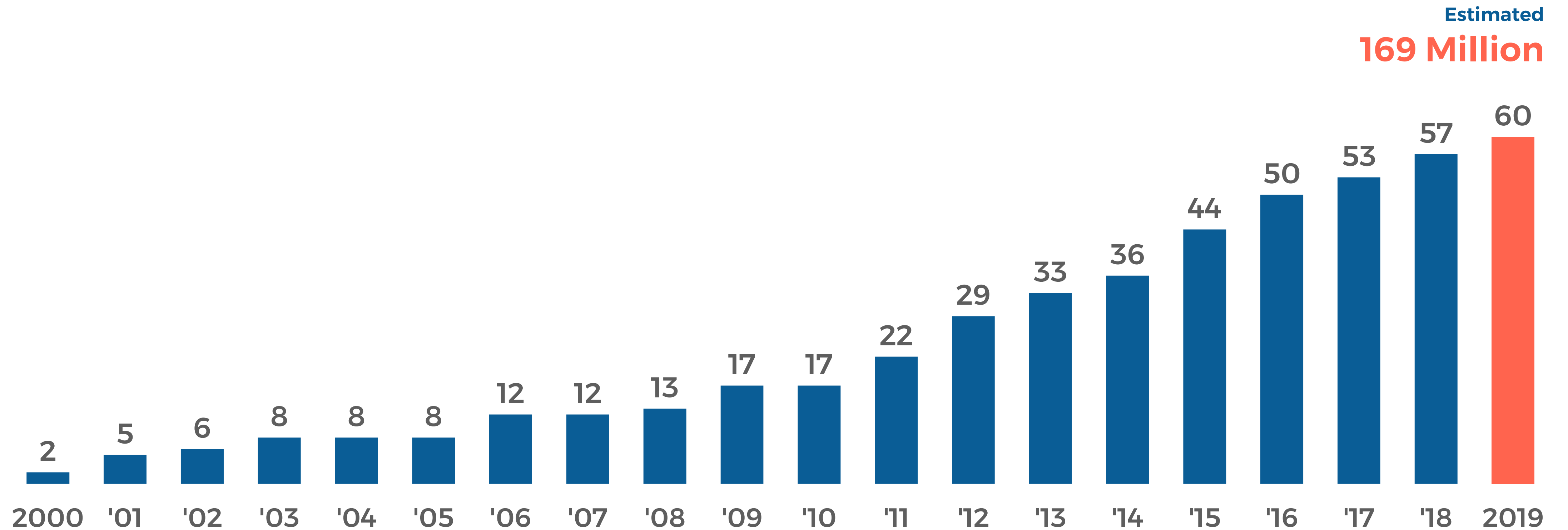


Weekly Online Audio Listening

TOTAL U.S. POPULATION 12+

% LISTENED TO ONLINE AUDIO IN LAST WEEK

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

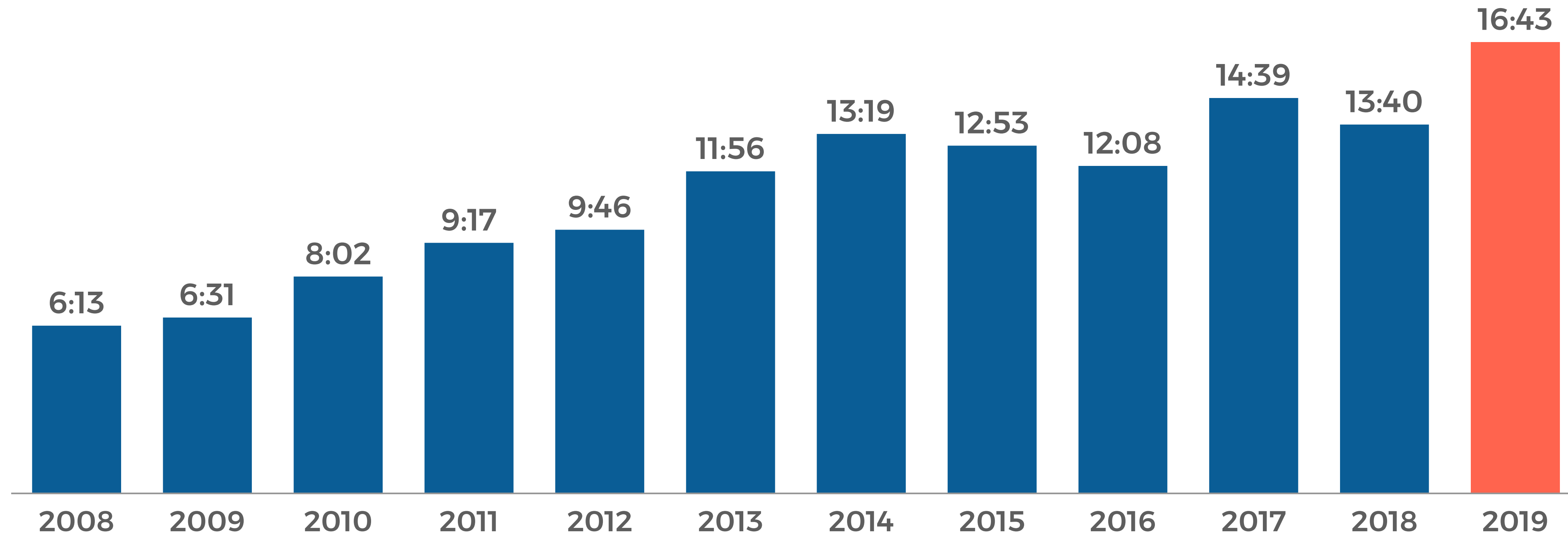


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Average Time Spent Listening to Online Audio

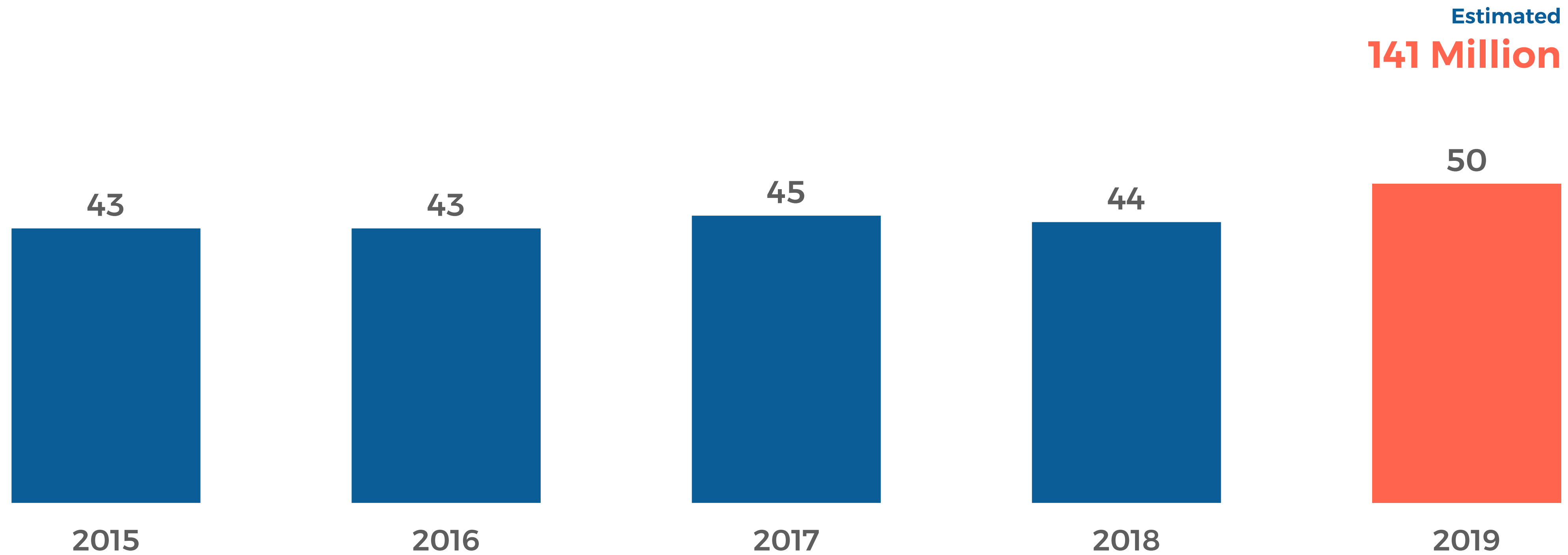
BASE: U.S. AGE 12+ WEEKLY ONLINE AUDIO LISTENERS

HOURS:MINUTES IN LAST WEEK



Audiobook Listening

TOTAL U.S. POPULATION 12+
% EVER LISTENED TO AN AUDIOBOOK



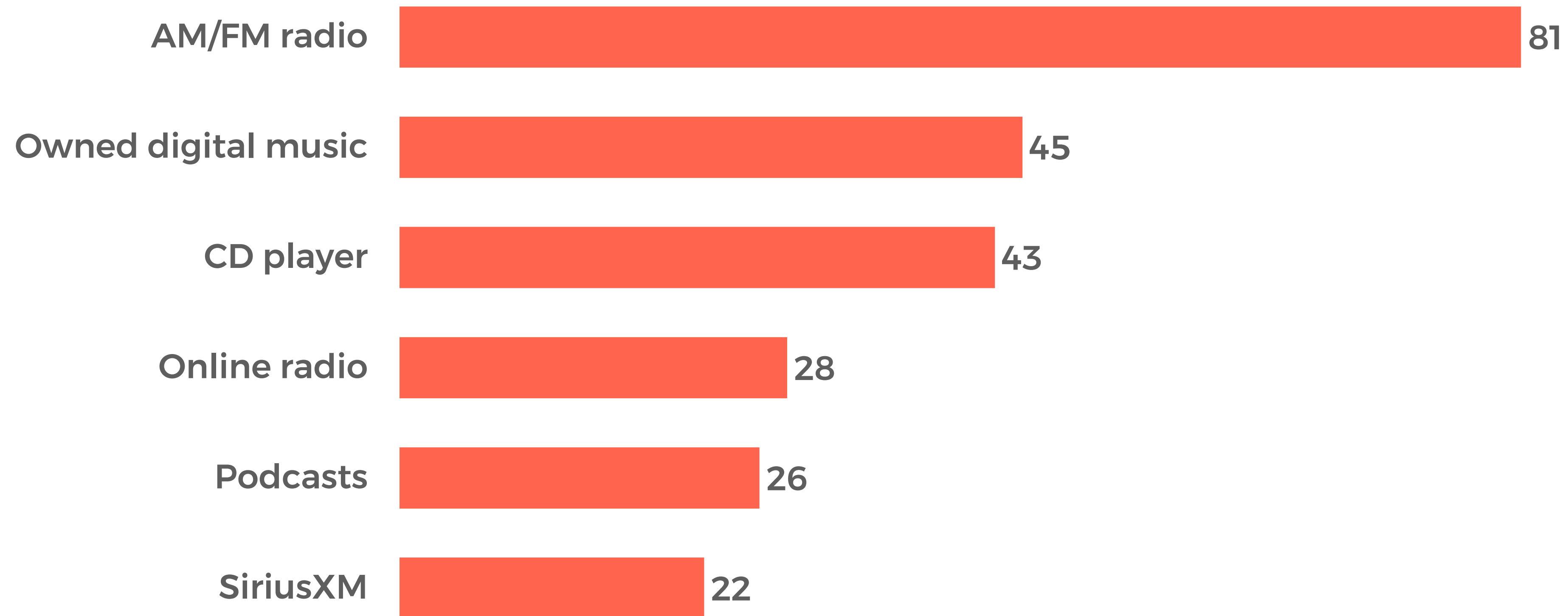
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In-Car Media

Audio Sources Currently Ever Used in Car

BASE: U.S. AGE 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 89%

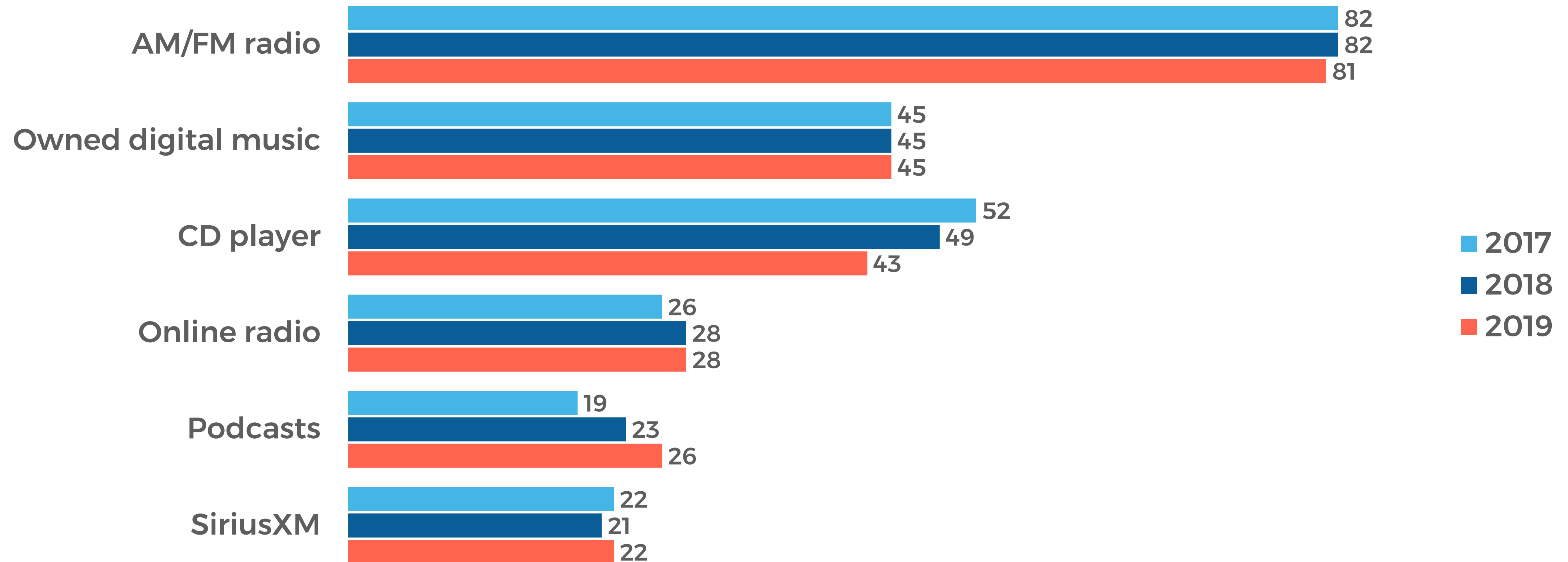
% USING AUDIO SOURCE IN CAR



Audio Sources Currently Ever Used in Car

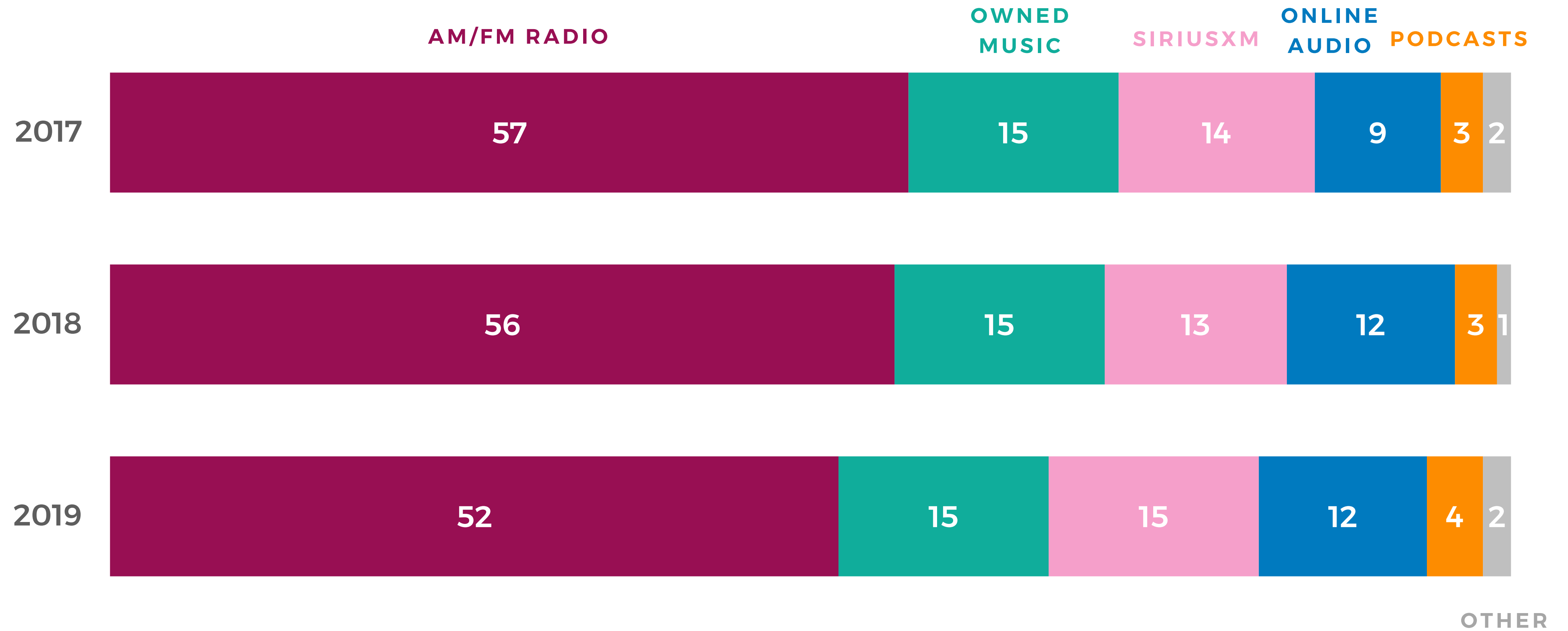
BASE: U.S. AGE 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 89%

% USING AUDIO SOURCE IN CAR



Audio Source Used Most Often in Car

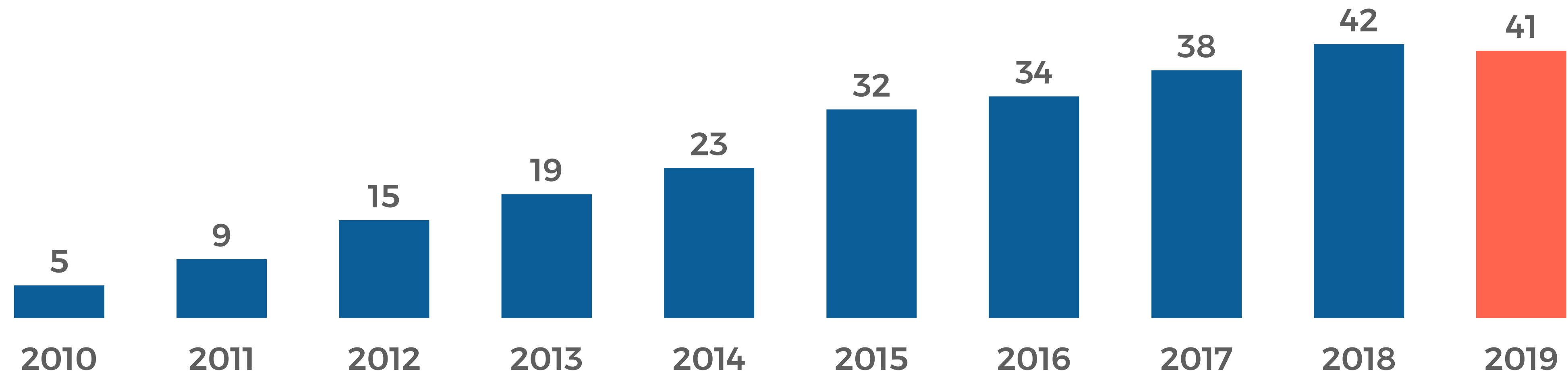
BASE: U.S. AGE 18+, DRIVEN/RIDDEN IN CAR IN LAST MONTH, AND USE ANY AUDIO SOURCE IN CAR



Online Audio Listening in Car Through a Cell Phone

TOTAL U.S. POPULATION 12+

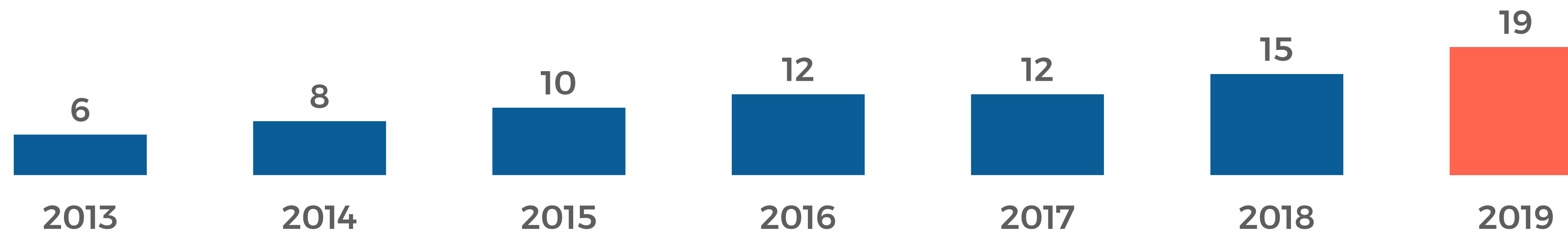
% EVER LISTENED TO ONLINE AUDIO IN A CAR THROUGH A CELL PHONE



In-Dash Information and Entertainment Systems

BASE: U.S. AGE 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 89%

% OWNING IN-DASH INFORMATION AND ENTERTAINMENT SYSTEM IN CAR



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Audio Brands



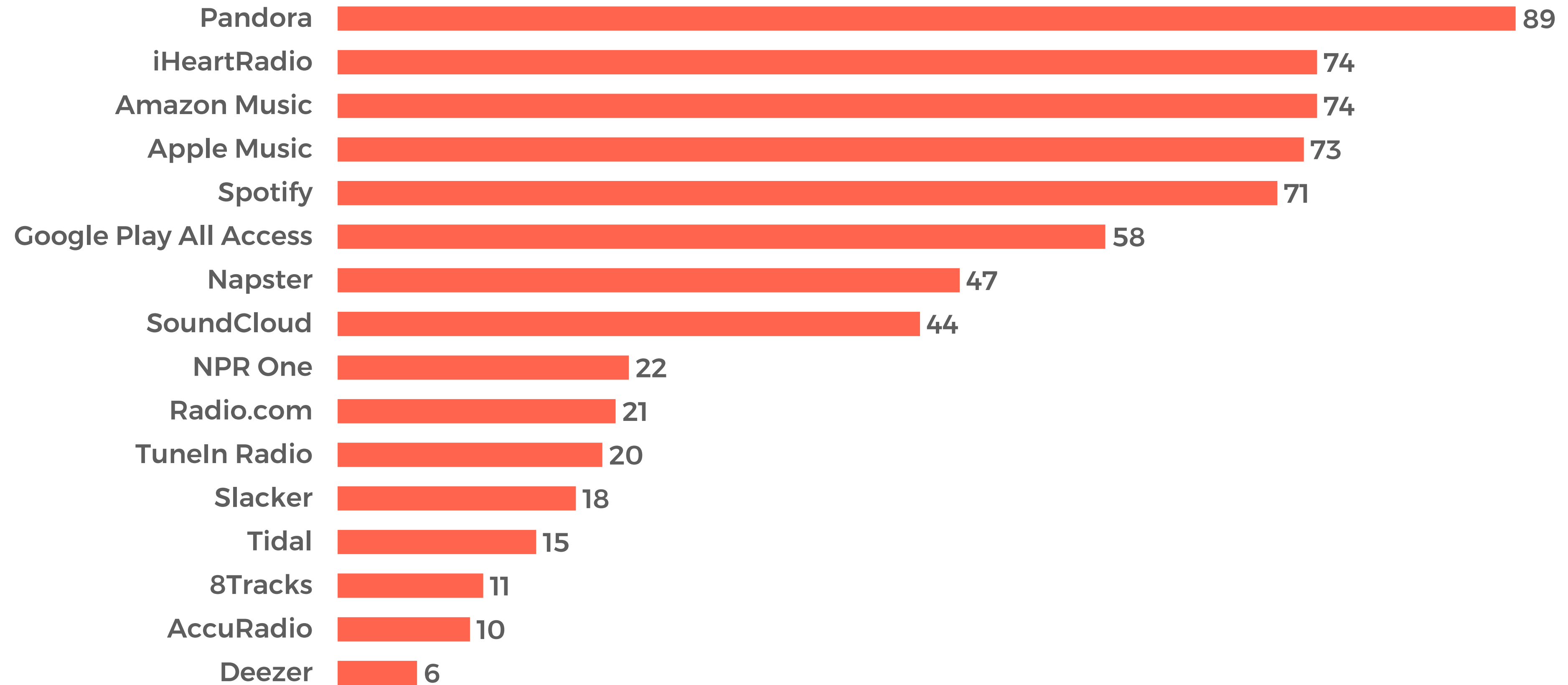
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Audio Brand Awareness

TOTAL U.S. POPULATION 12+

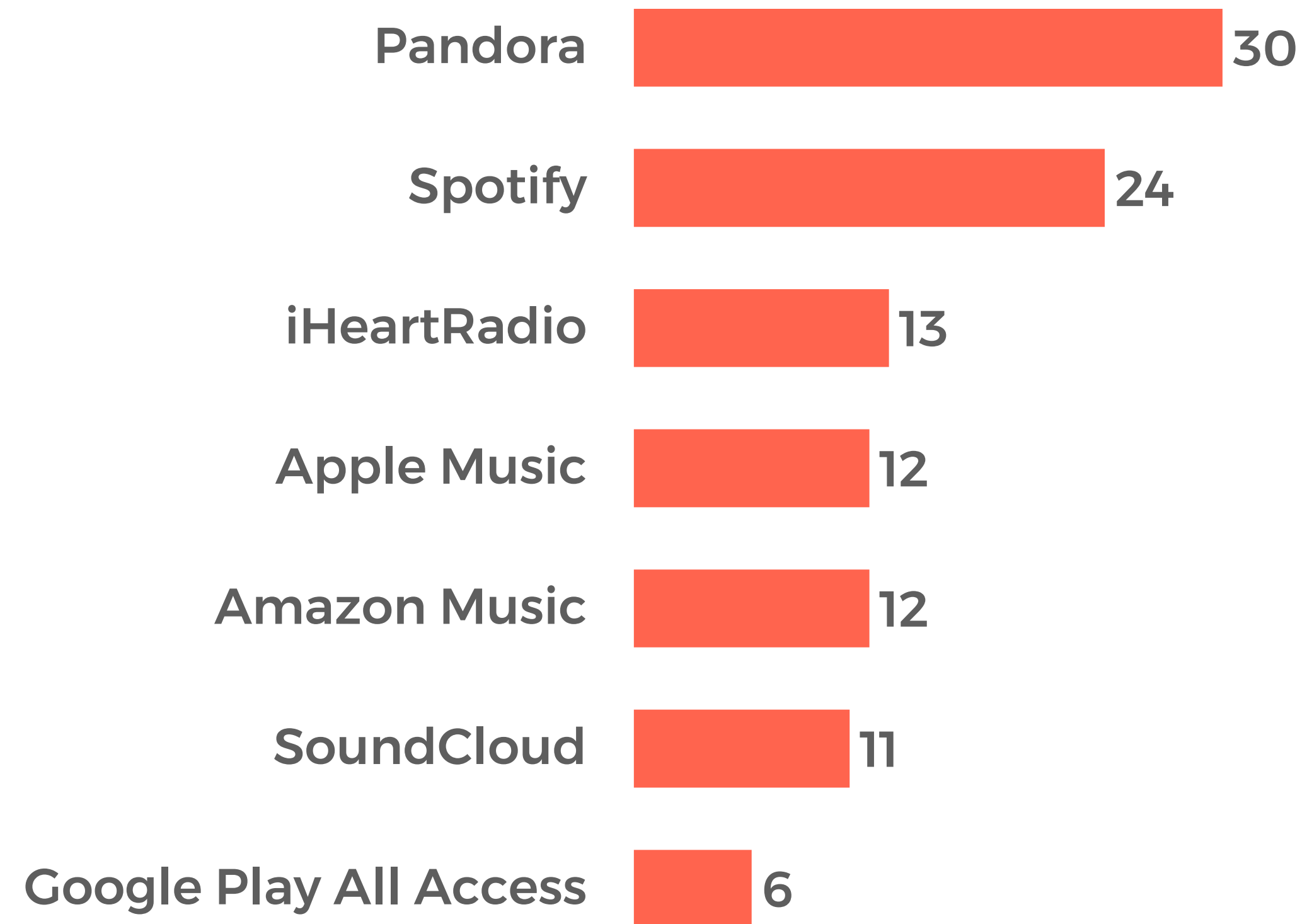
% AWARE OF AUDIO BRAND



Audio Brands Listened to in Last Month

TOTAL U.S. POPULATION 12+

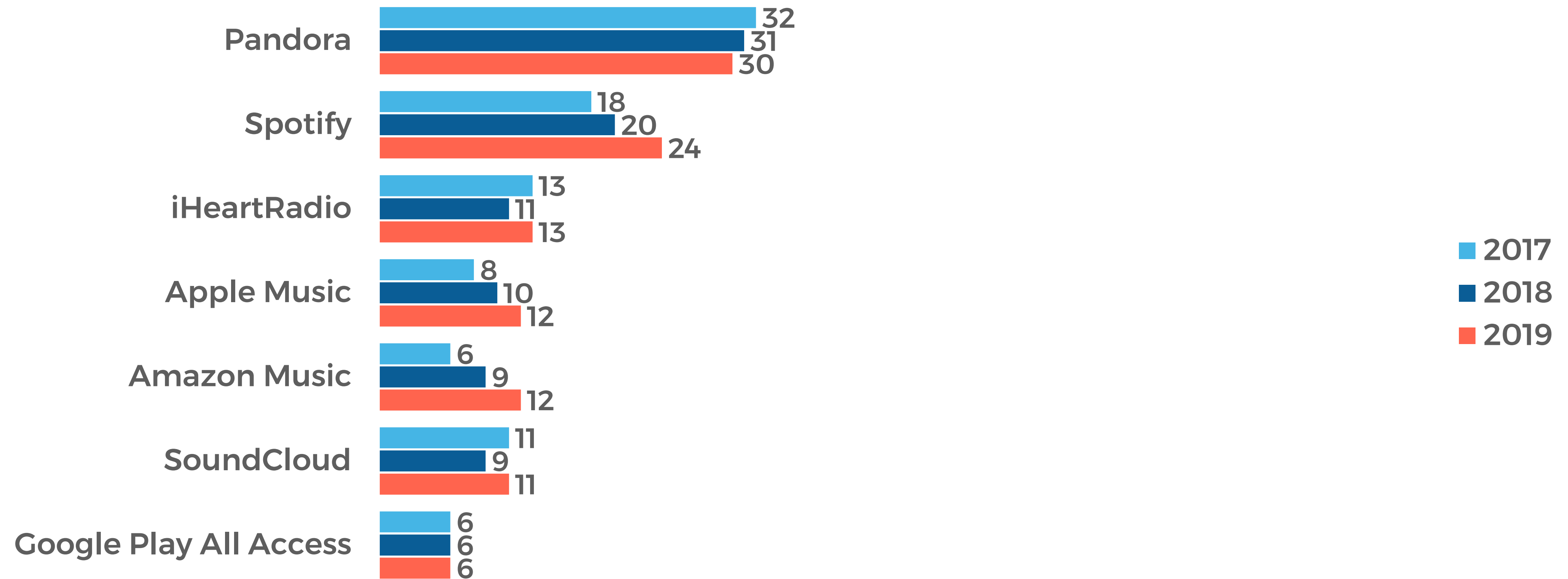
% LISTENED TO AUDIO BRAND IN LAST MONTH



Audio Brands Listened to in Last Month

TOTAL U.S. POPULATION 12+

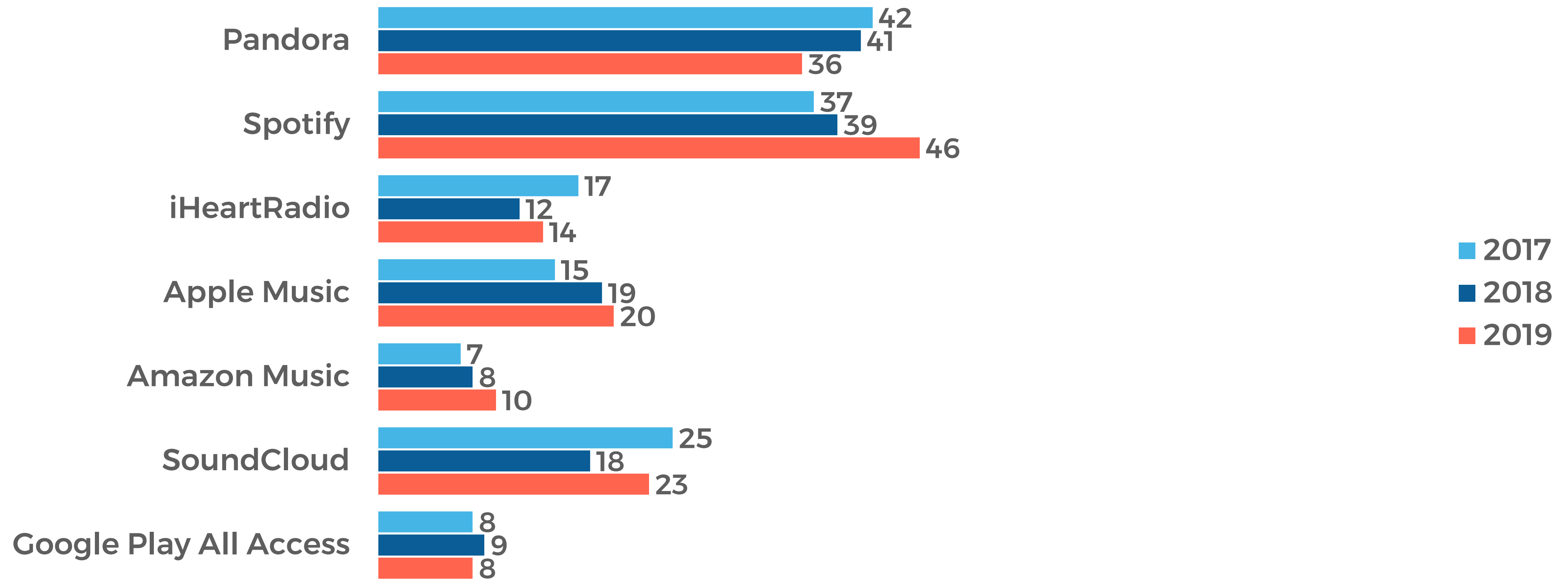
% LISTENED TO AUDIO BRAND IN LAST MONTH



Audio Brand Listened to in Last Month (Age 12-34)

U.S. POPULATION

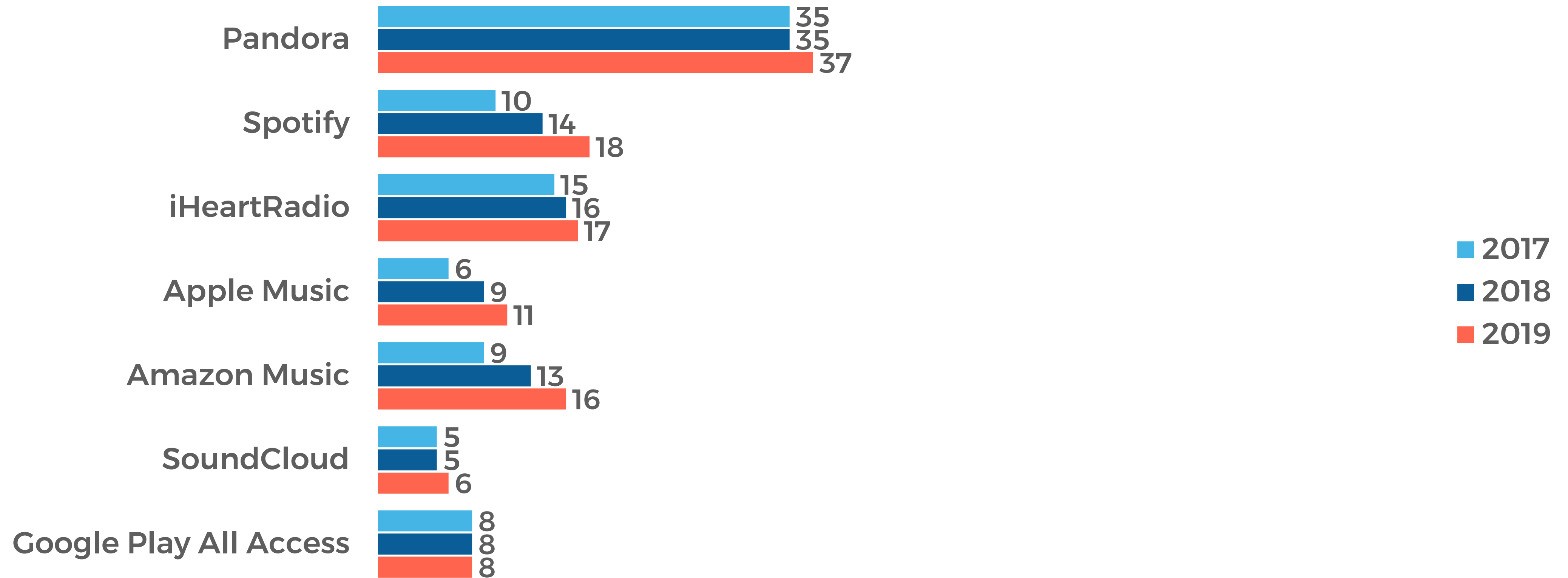
% LISTENED TO AUDIO BRAND IN LAST MONTH



Audio Brand Listened to in Last Month (Age 35-54)

U.S. POPULATION

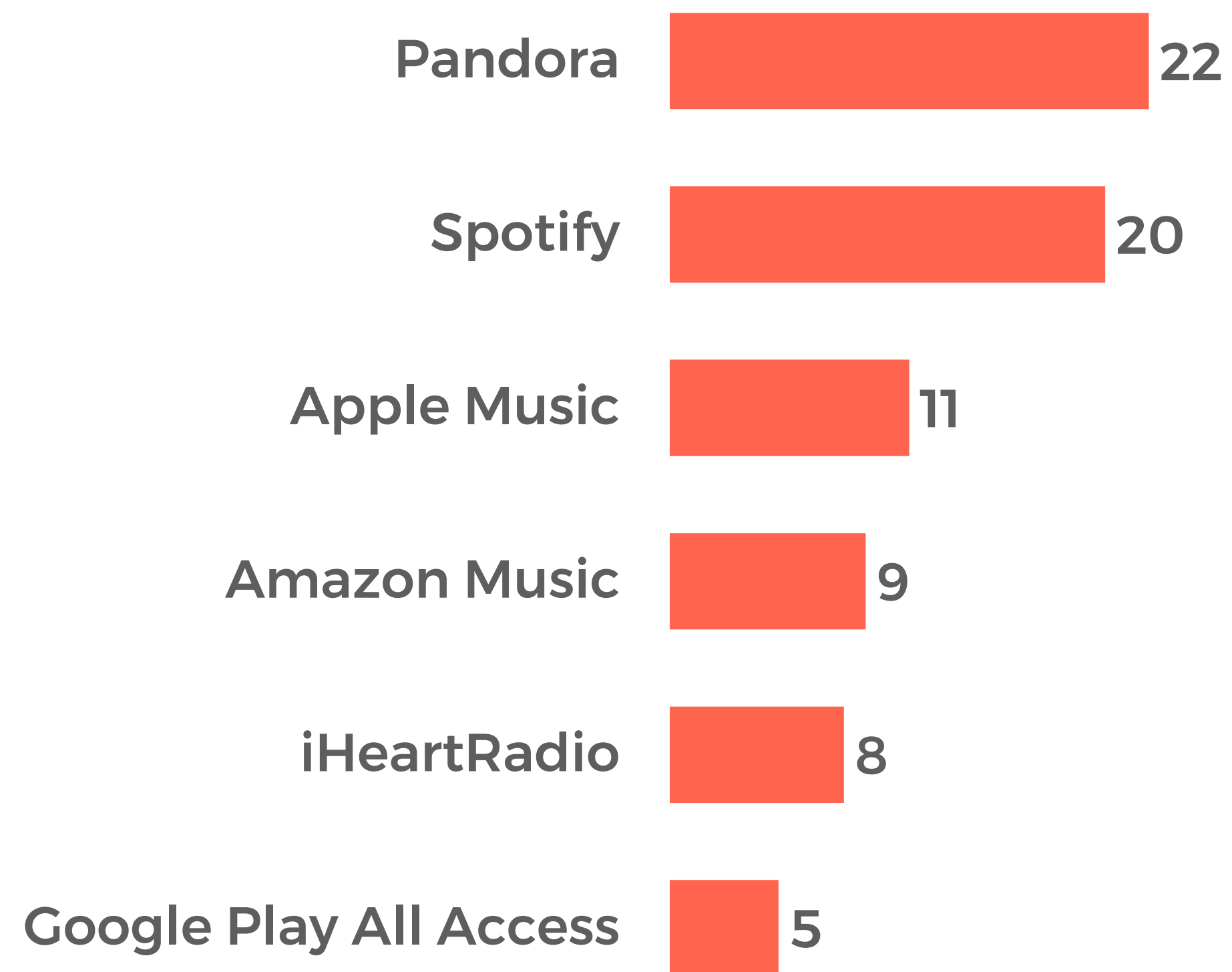
% LISTENED TO AUDIO BRAND IN LAST MONTH



Audio Brands Listened to in Last Week

TOTAL U.S. POPULATION 12+

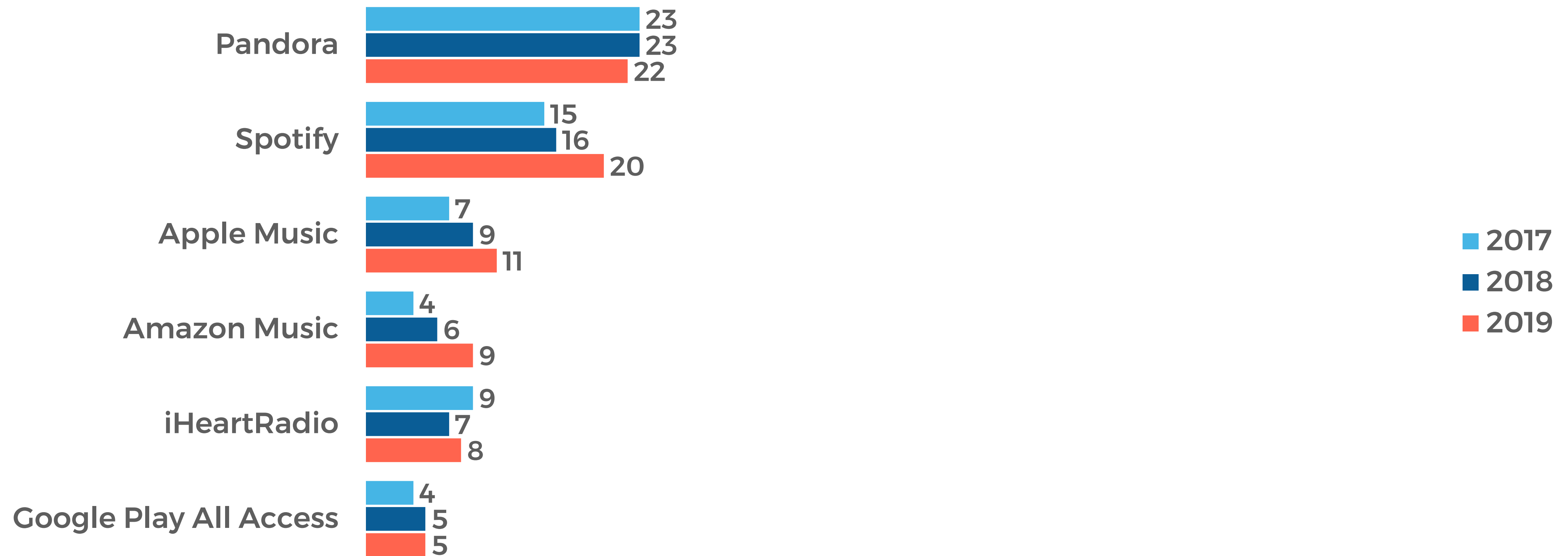
% LISTENED TO AUDIO BRAND IN LAST WEEK



Audio Brands Listened to in Last Week

TOTAL U.S. POPULATION 12+

% LISTENED TO AUDIO BRAND IN LAST WEEK



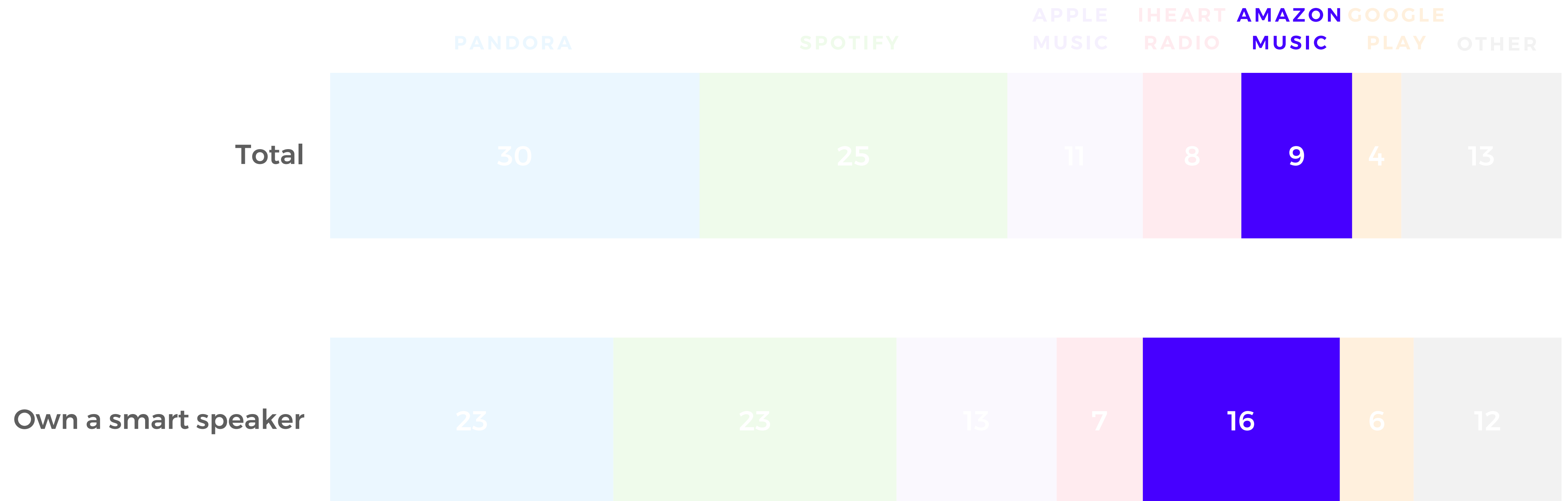
Audio Brand Used Most Often

BASE: U.S. AGE 12+ AND CURRENTLY EVER USE ANY AUDIO BRAND



Audio Brand Used Most Often

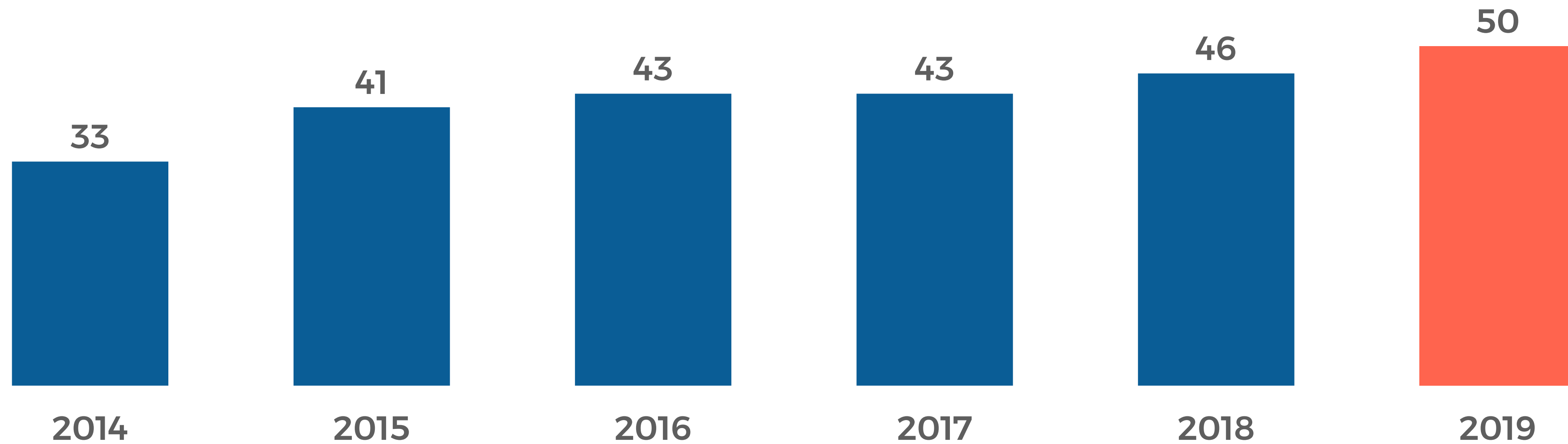
BASE: U.S. AGE 12+ AND CURRENTLY EVER USE ANY AUDIO BRAND



Weekly YouTube Music Usage

TOTAL U.S. POPULATION 12+

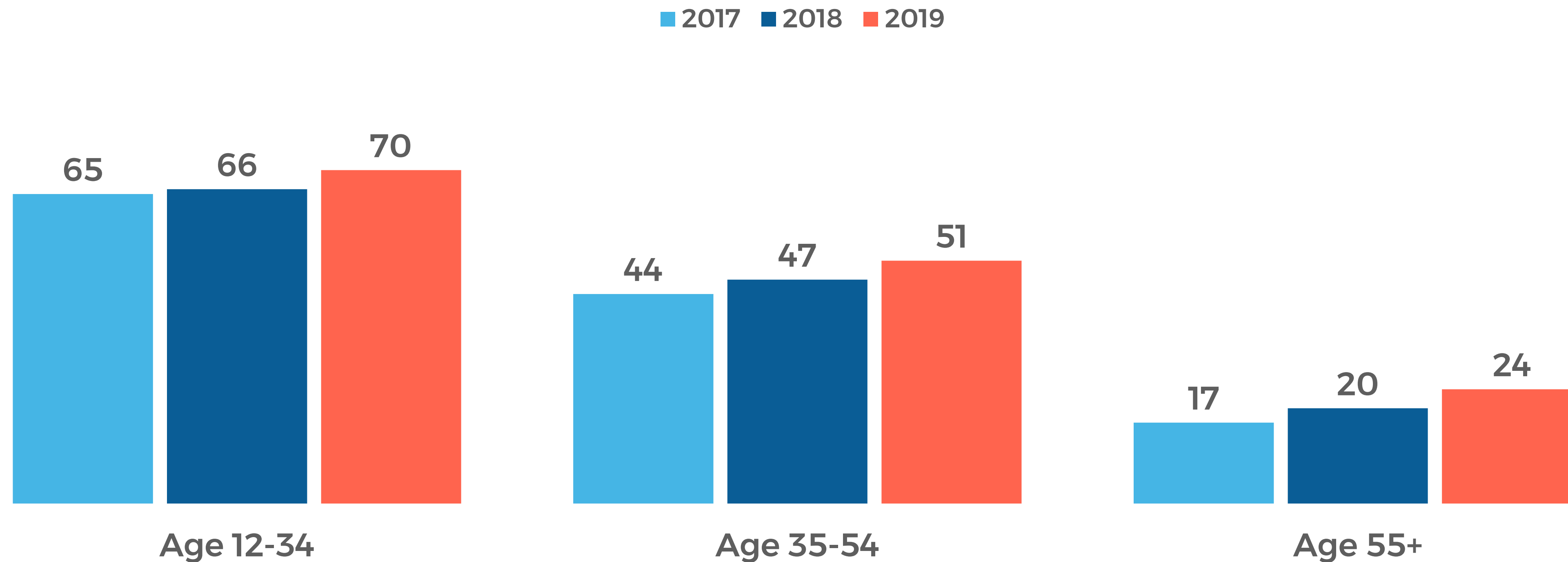
% USED YOUTUBE FOR MUSIC OR MUSIC VIDEOS IN LAST WEEK



Weekly YouTube Music Usage

U.S. POPULATION

% USED YOUTUBE FOR MUSIC OR MUSIC VIDEOS IN LAST WEEK



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Podcasting



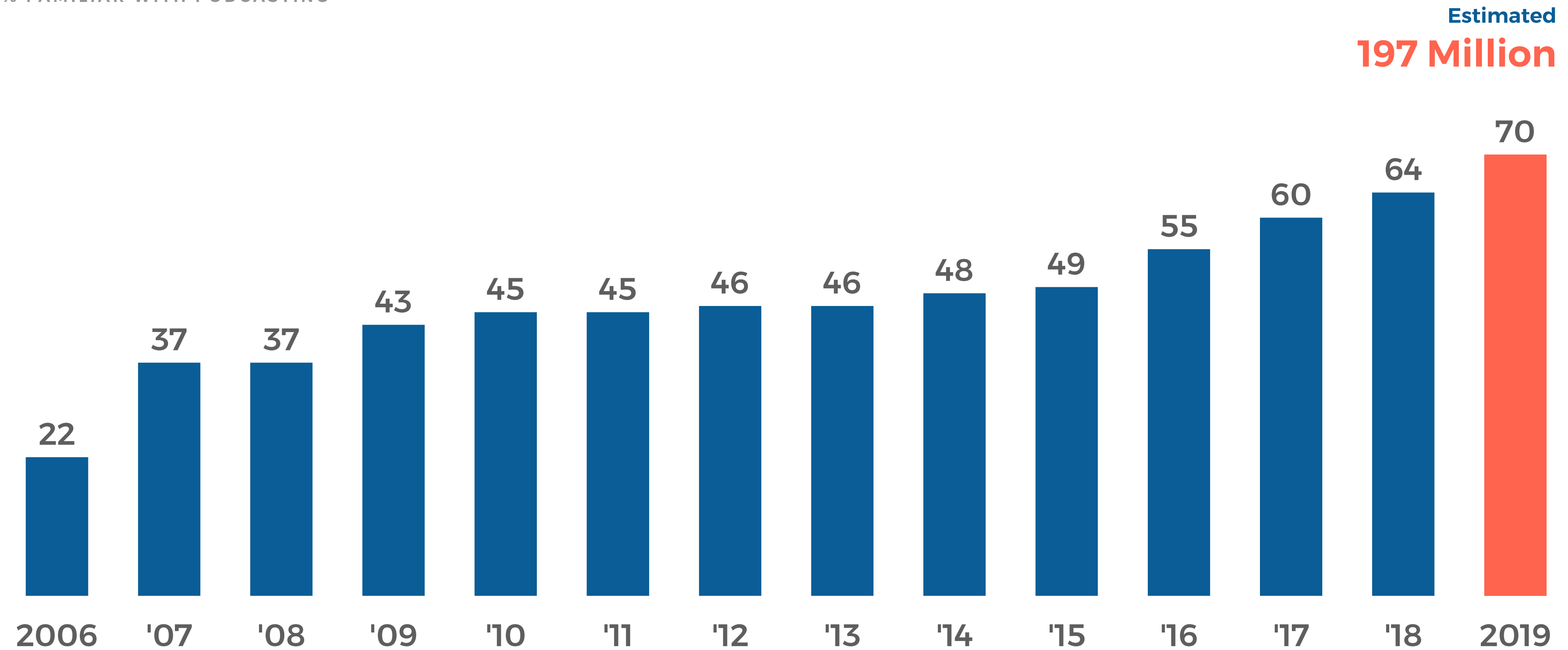
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Podcasting Familiarity

TOTAL U.S. POPULATION 12+

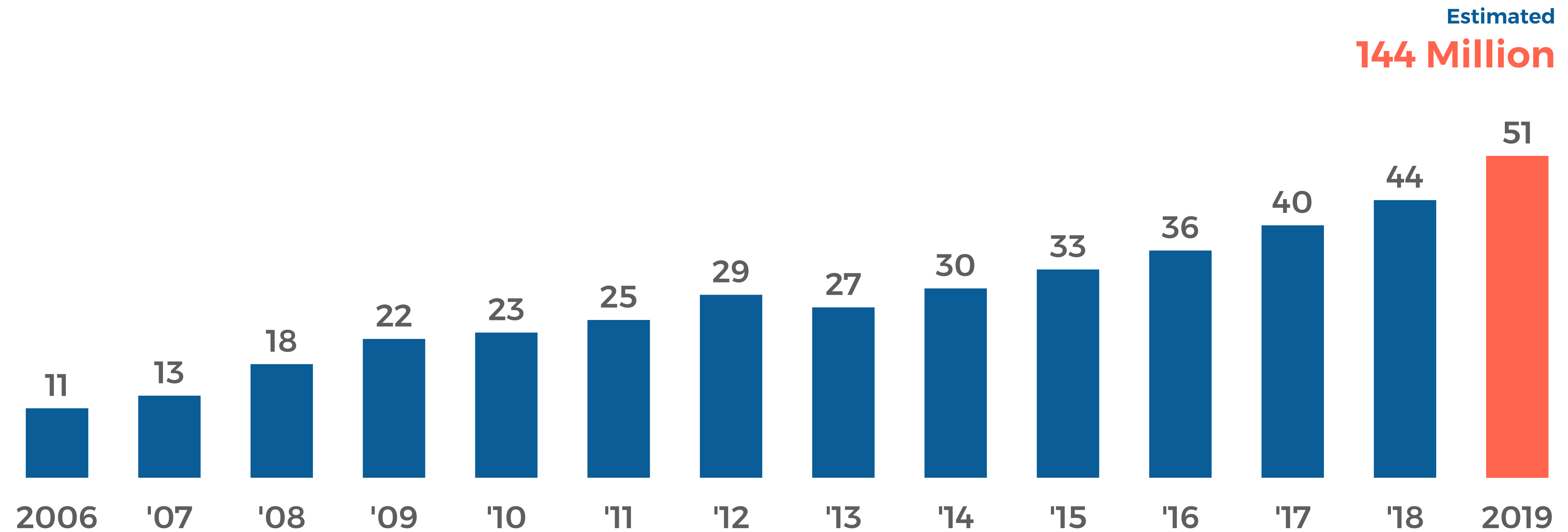
% FAMILIAR WITH PODCASTING



Podcasting Listening

TOTAL U.S. POPULATION 12+

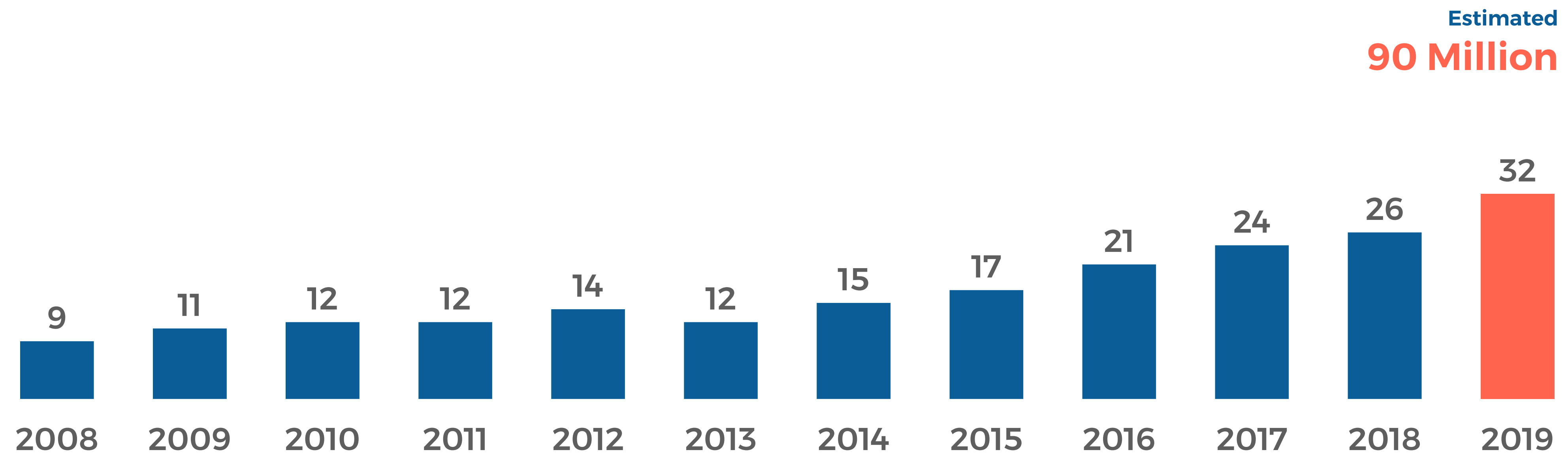
% EVER LISTENED TO A PODCAST



Monthly Podcast Listening

TOTAL U.S. POPULATION 12+

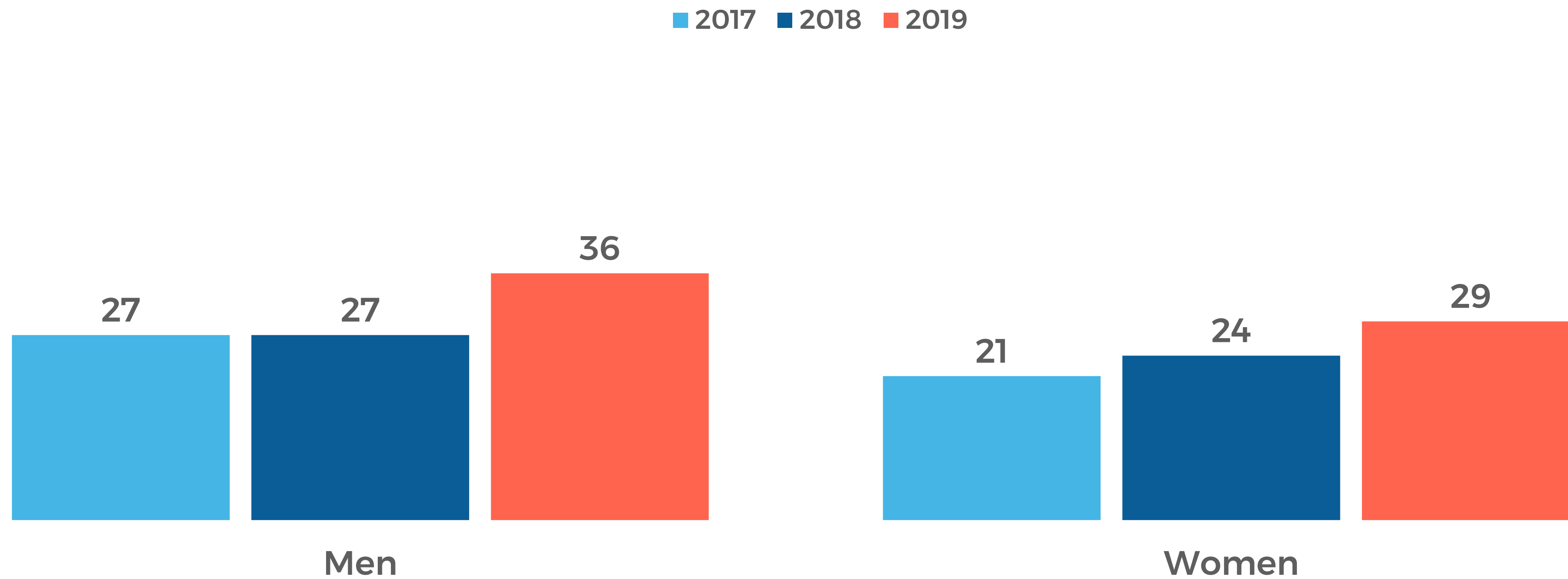
% LISTENED TO A PODCAST IN LAST MONTH



Monthly Podcast Listening

U.S. POPULATION

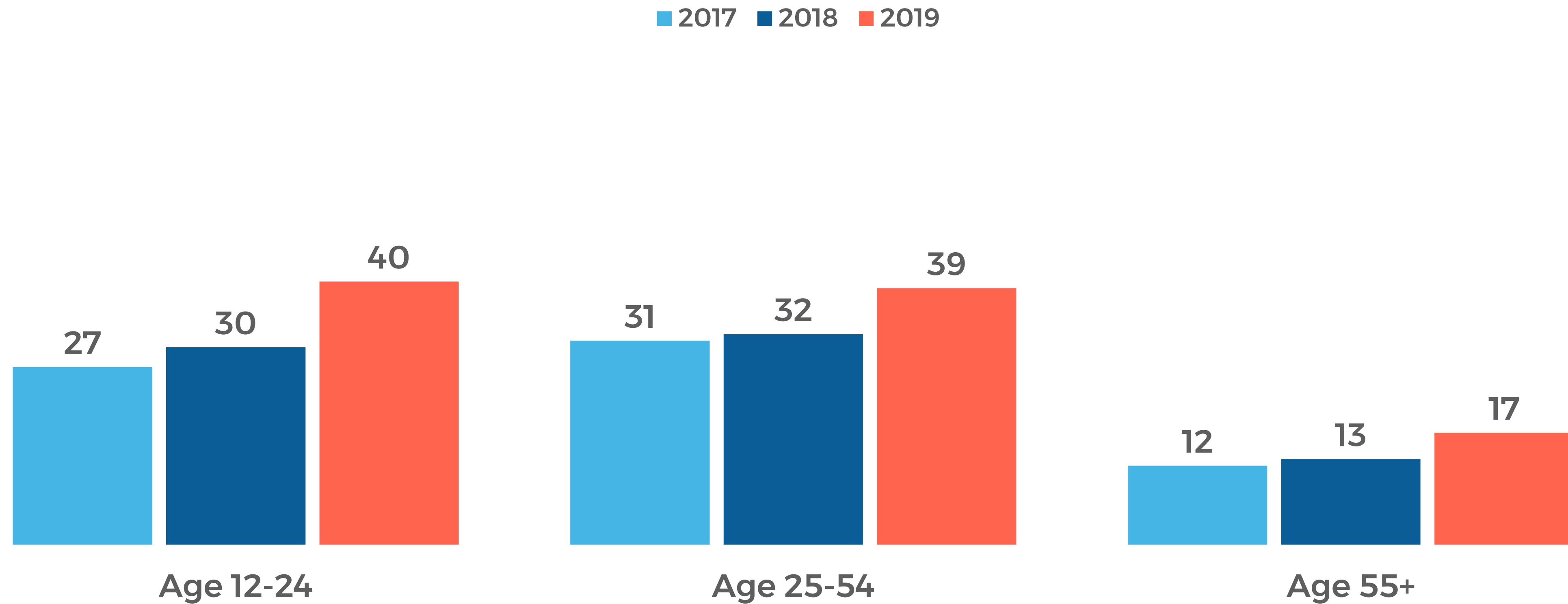
% LISTENED TO A PODCAST IN LAST MONTH



Monthly Podcast Listening

U.S. POPULATION

% LISTENED TO A PODCAST IN LAST MONTH

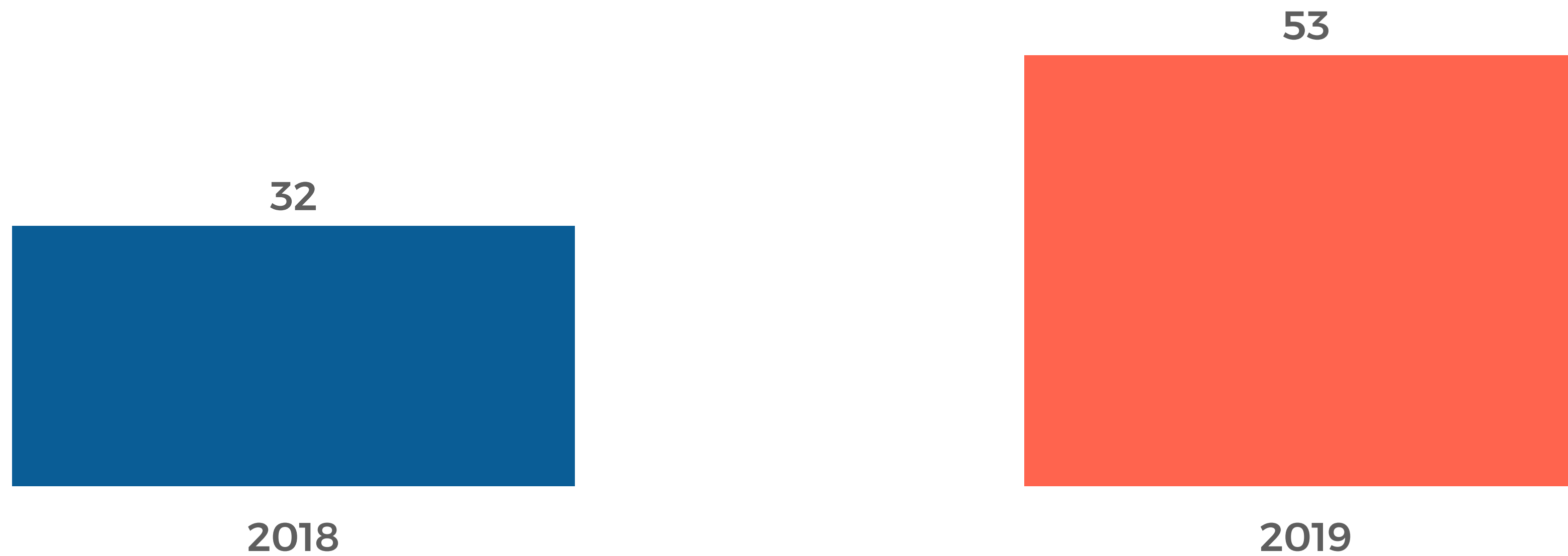


Monthly Podcast Listening

BASE: U.S. AGE 12-24 AND LISTENED TO SPOTIFY IN LAST MONTH

% LISTENED TO A PODCAST IN LAST MONTH

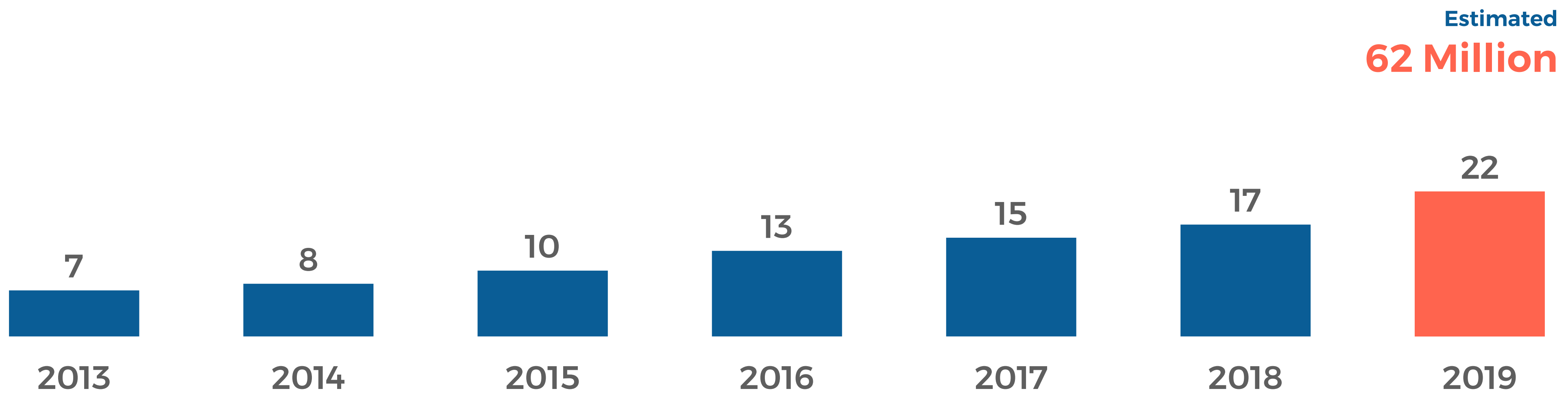
Among Spotify Listeners Age 12-24



Weekly Podcast Listening

TOTAL U.S. POPULATION 12+

% LISTENED TO A PODCAST IN LAST WEEK



Estimated:

17 Million

more persons in the U.S. are
aware of podcasting than in 2018

Estimated:

20 Million

more persons in the U.S. have ever
listened to a podcast than in 2018

Estimated:

17 Million

more monthly podcast listeners
in the U.S. than in 2018

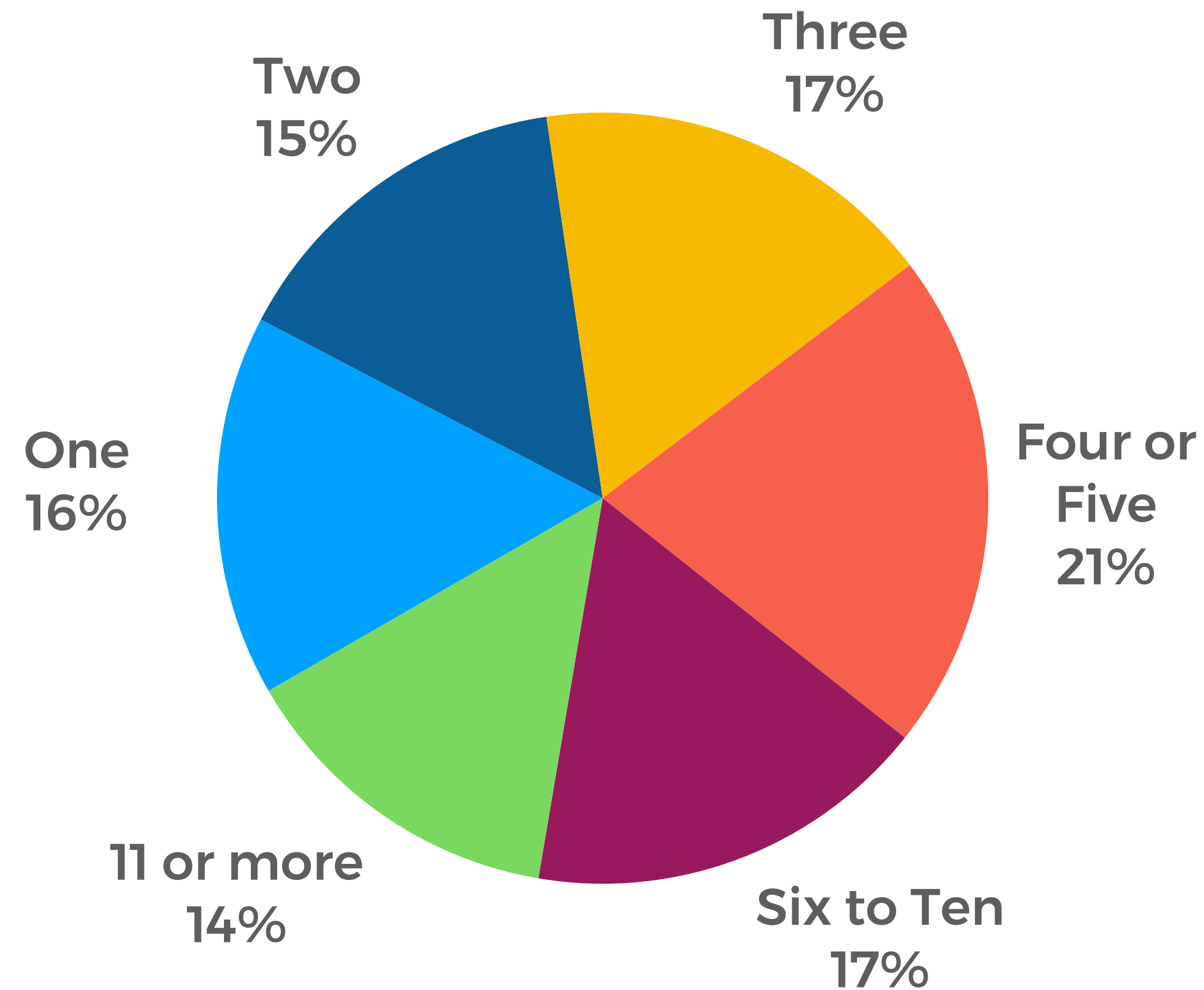
Estimated:

14 Million

more weekly podcast listeners
in the U.S. than in 2018

Number of Podcasts Listened to in Last Week

BASE: U.S. AGE 12+ AND LISTENED TO PODCAST IN LAST WEEK



U.S. weekly podcast listeners averaged
Seven podcasts
in the last week

Observations

Online audio has reached a new high in weekly time spent listening, potentially driven by podcasting and smart speakers.

Observations

Podcasting has reached a milestone, with the majority of Americans now saying they have ever listened to one.

Observations

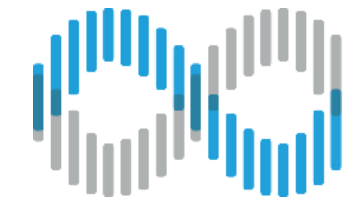
Along with the increases in podcast listening, audiobook consumption also surged, indicating a trend towards increased spoken word audio consumption.

Observations

Social Media usage appears to have stalled. Facebook and Twitter have declined, especially with younger users.

Observations

Smart speaker ownership continues to grow, approaching one in four Americans age 12+. The average smart speaker user possesses two devices.



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Coming Soon

Podcast Consumer

Moms and Media

The Infinite Dial - Australia

The Infinite Dial - Canada

Details to follow at www.edisonresearch.com

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