



THE INFINITE DIAL

2018

#InfiniteDial



Study Overview

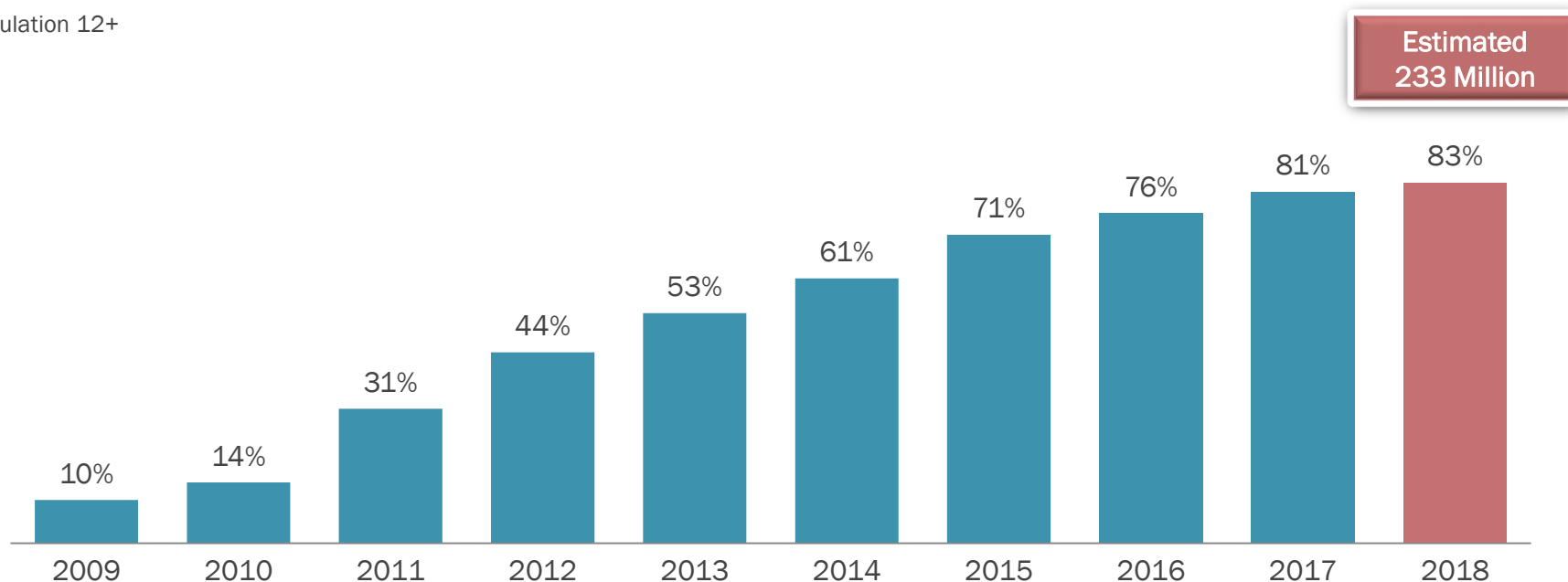
- The Infinite Dial is the longest-running survey of digital media consumer behavior in America
- The annual reports in this series have covered a wide range of digital media and topics since 1998
- For 2018, The Infinite Dial tracks and covers new research on mobile behaviors, Internet Radio, Podcasting, Social Media, Smart Speakers and more

Study Methodology

- In January/February 2018, Edison Research conducted a national telephone survey of 2000 people aged 12 and older, using random digit dialing techniques to both cell phones and landlines
- Survey offered in both English and Spanish languages
- Data weighted to national 12+ population figures

Smartphone Ownership

Total Population 12+

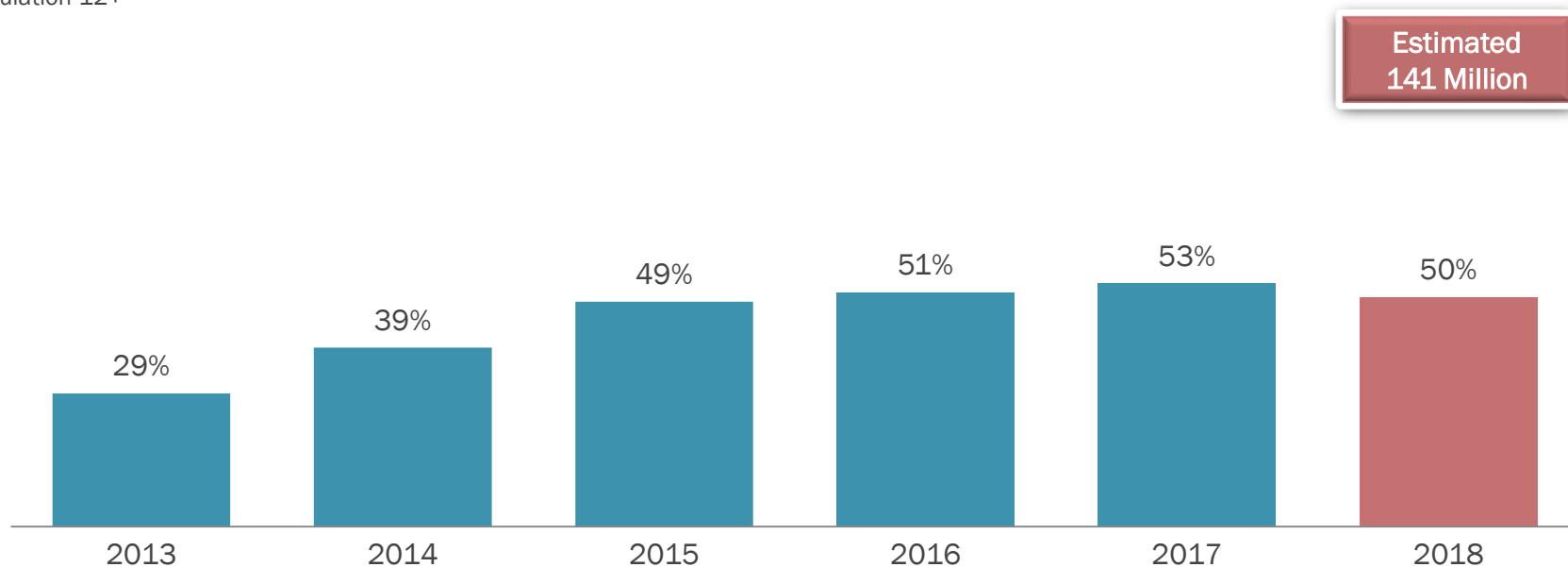




MEDIA & TECHNOLOGY

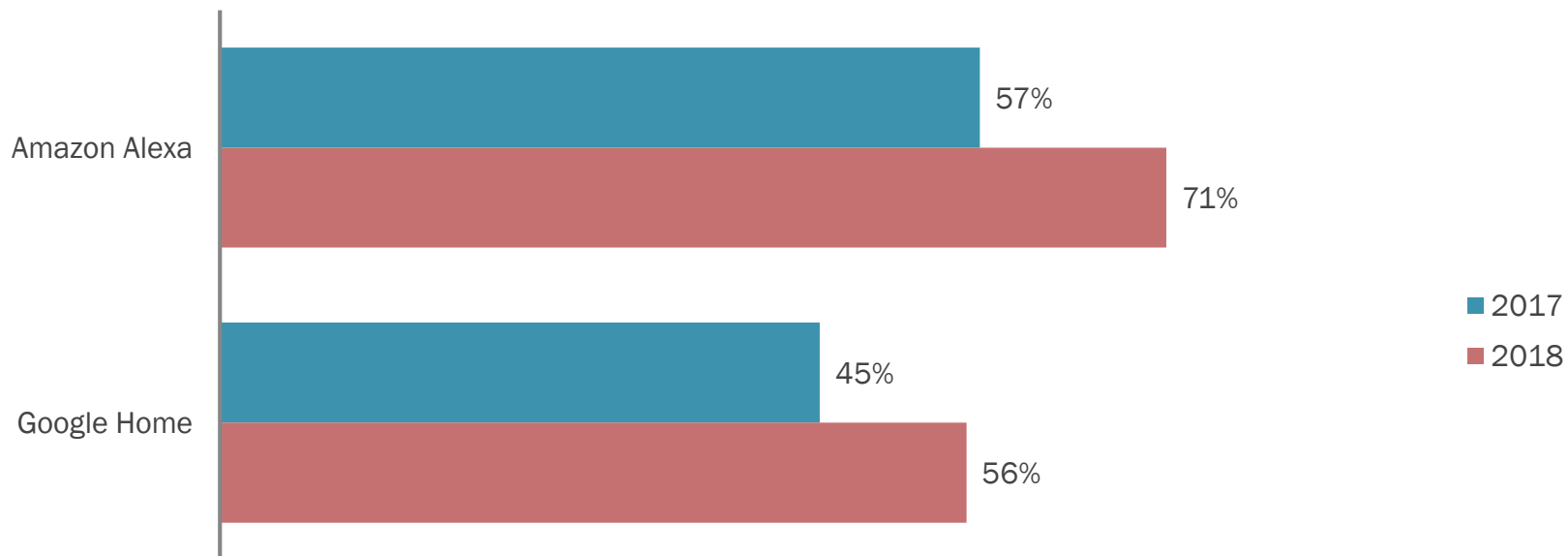
Tablet Ownership

Total Population 12+



Smart Speaker Awareness

Total Population 12+



Smart Speaker Ownership

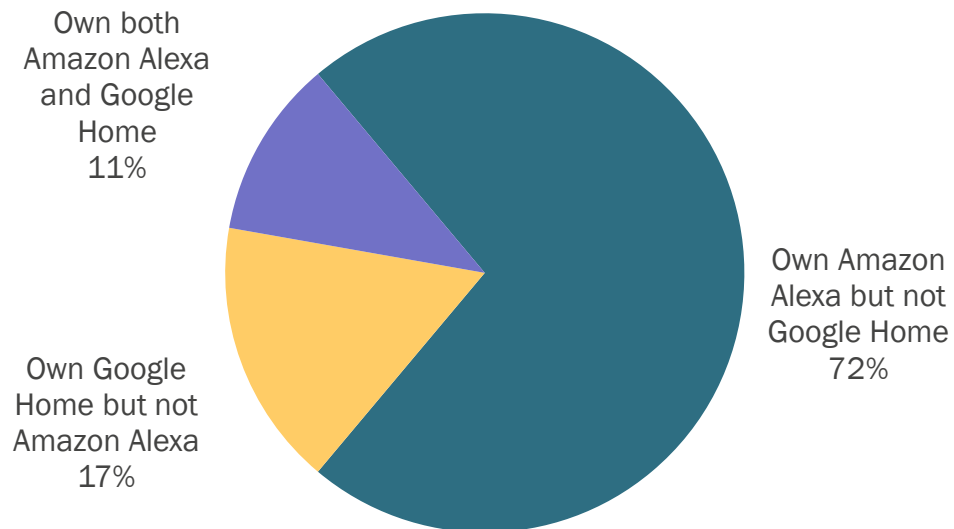
Total Population 12+

Estimated
51 Million



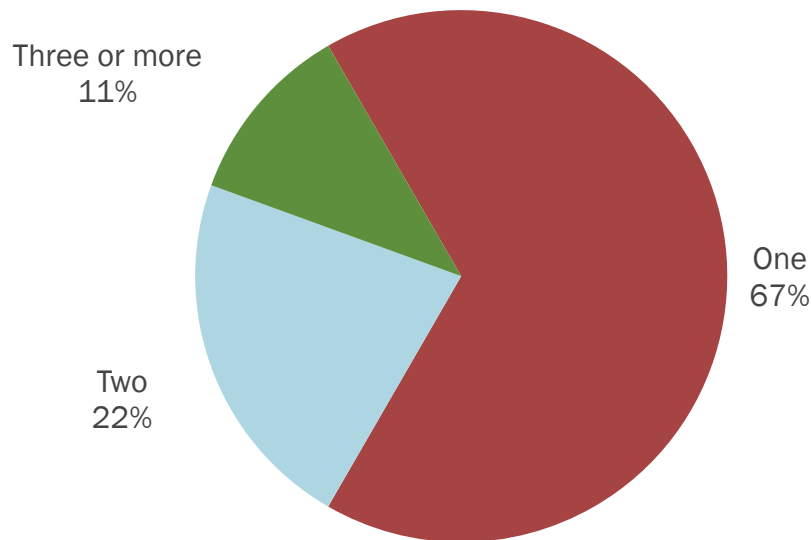
Smart Speaker Ownership

Base: Own a Smart Speaker



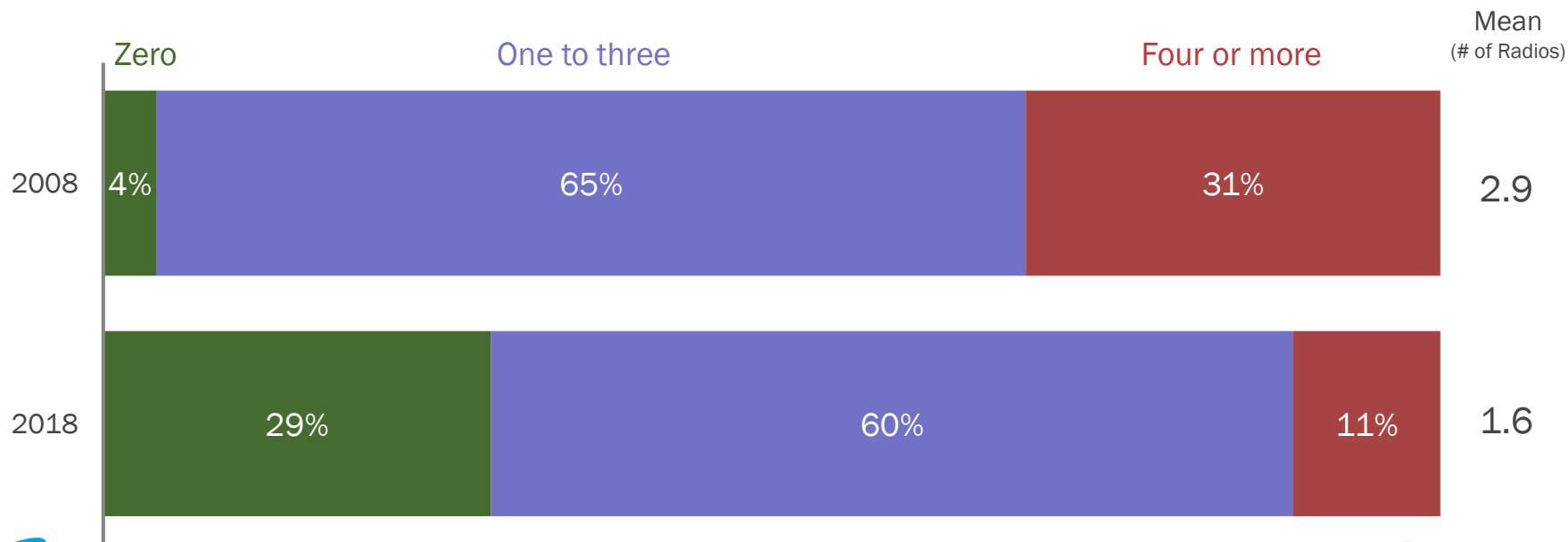
Number of Smart Speakers in Household

Base: Own a Smart Speaker

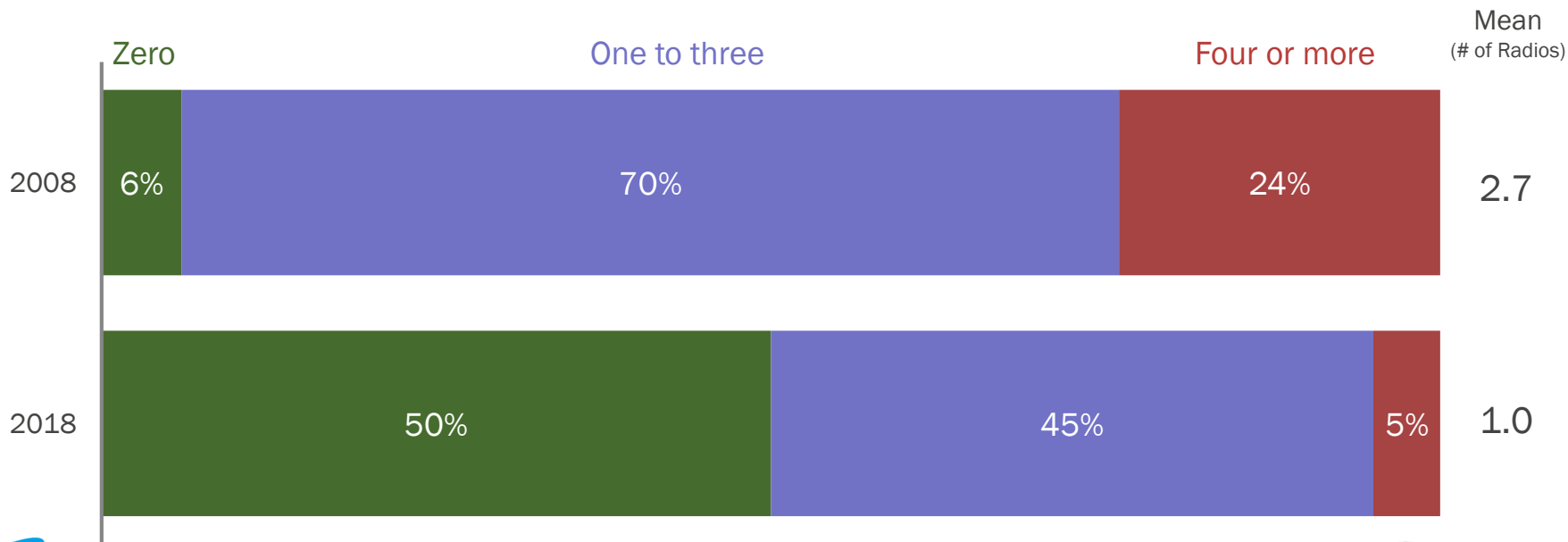


Number of Radios Owned in Home

Total Population 12+

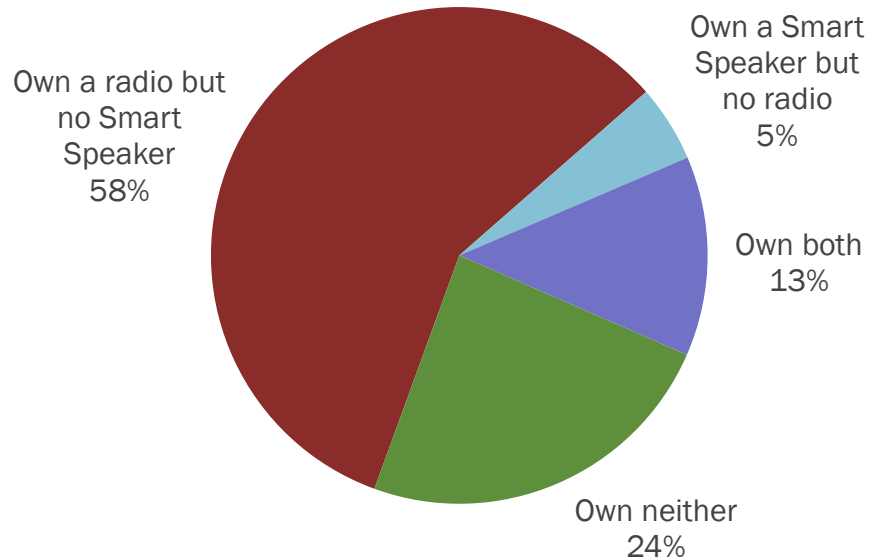


Number of Radios Owned in Home (Age 18-34)



Radio Ownership and Smart Speaker Ownership

Total Population 12+

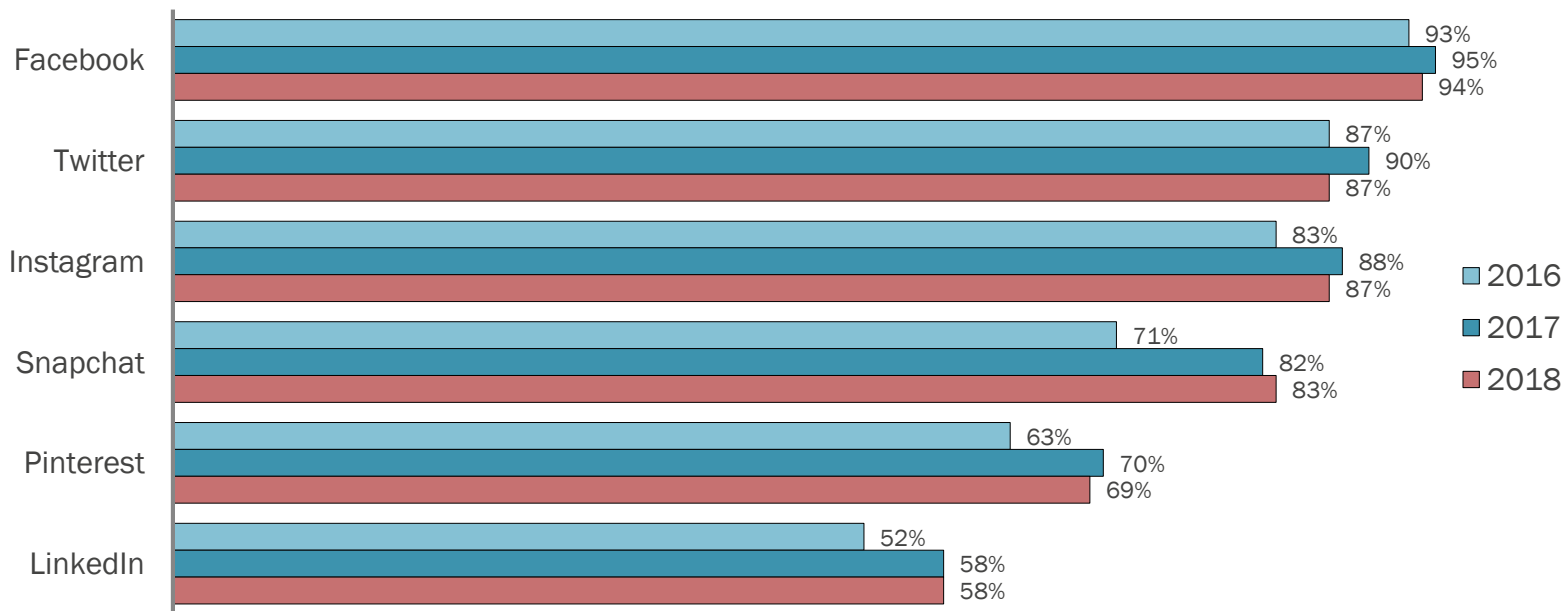




SOCIAL MEDIA

Social Media Brand Awareness

Total Population 12+

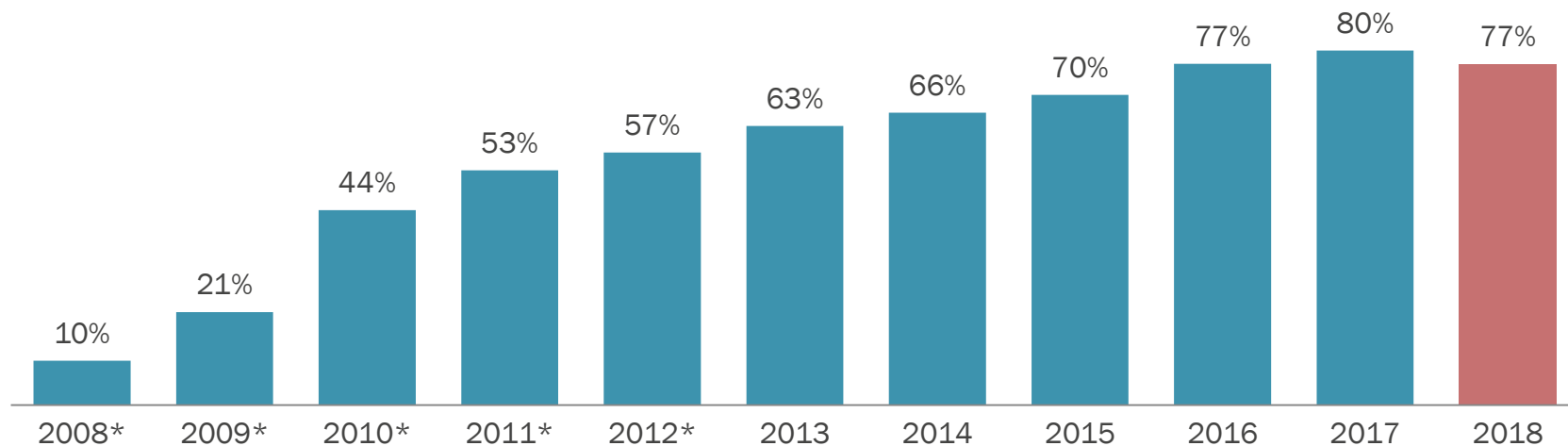


% aware of social media brand

Social Media Usage

Estimated
216 Million

Base: Age 12+ and currently ever use Facebook, Snapchat, Twitter, Instagram, Pinterest, or LinkedIn



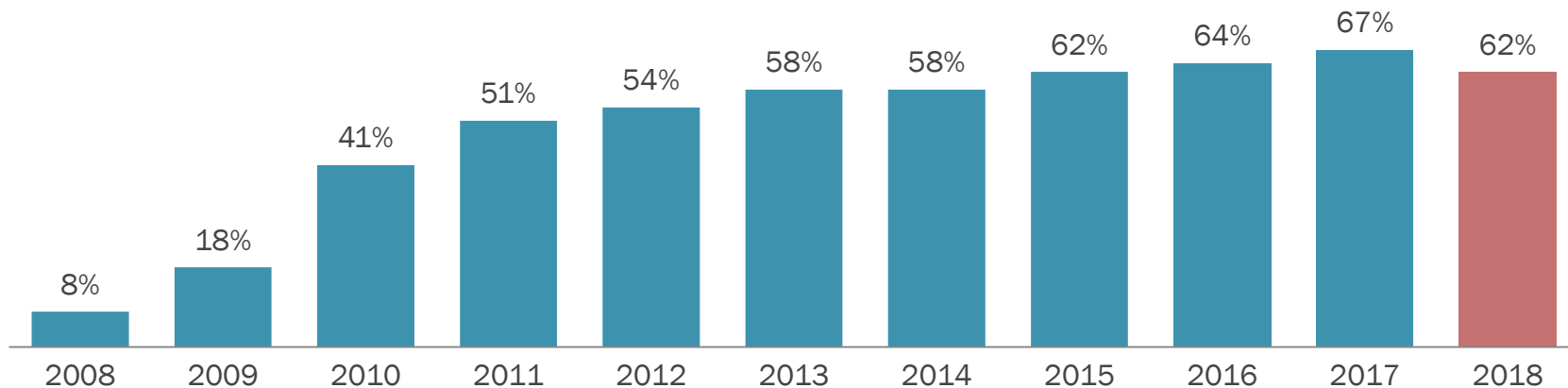
*2008-2012: Ever use Facebook, Twitter, or LinkedIn

% currently ever use

Facebook Usage

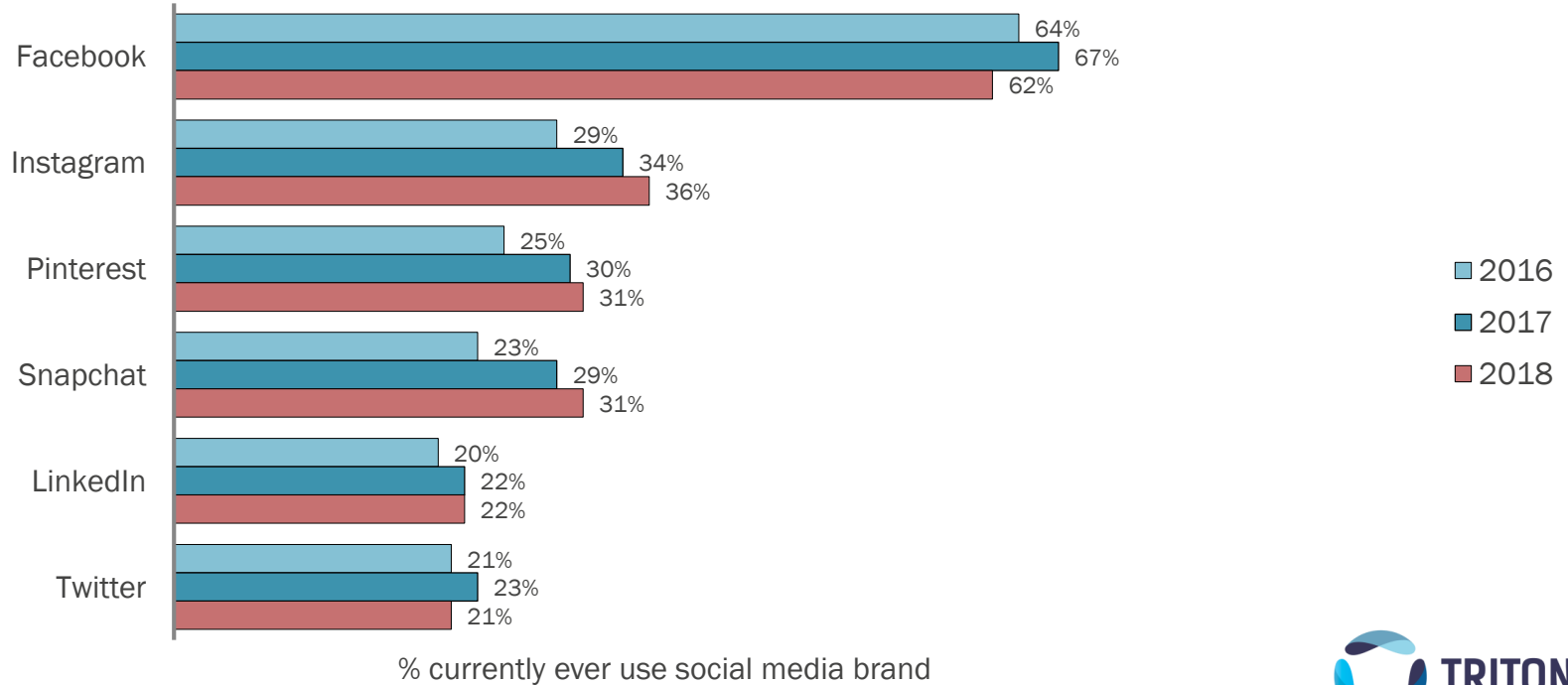
Total Population 12+

Estimated
174 Million

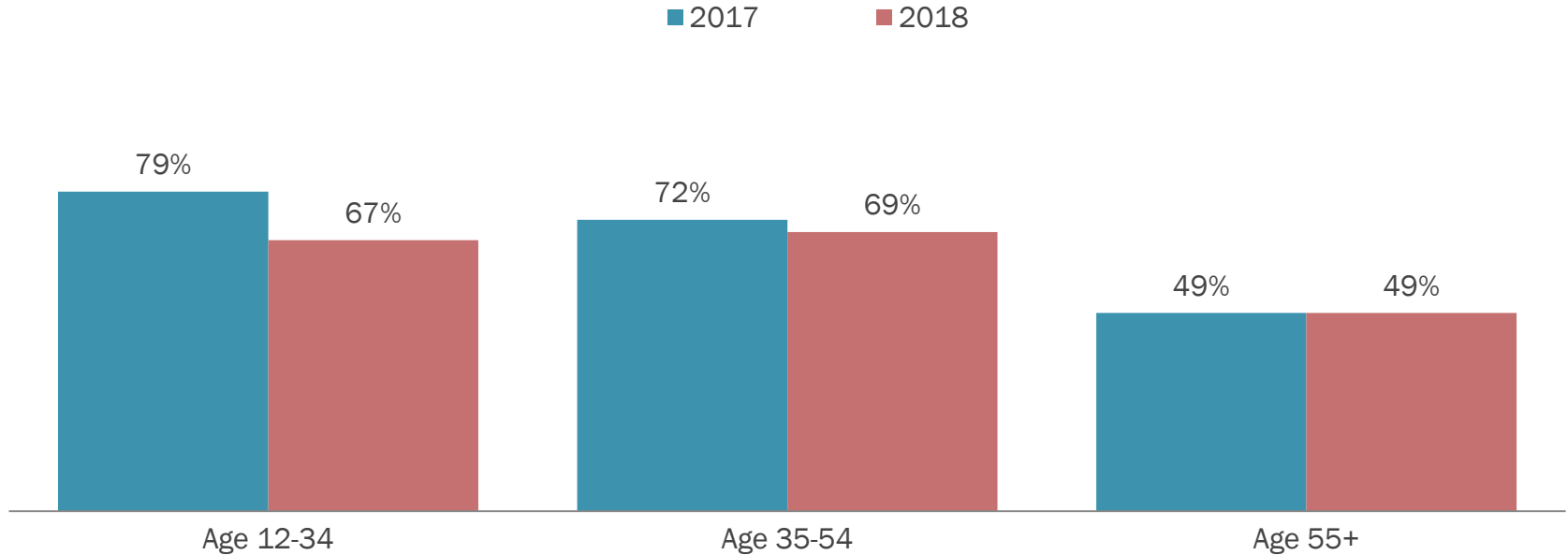


Social Media Brand Usage

Total Population 12+



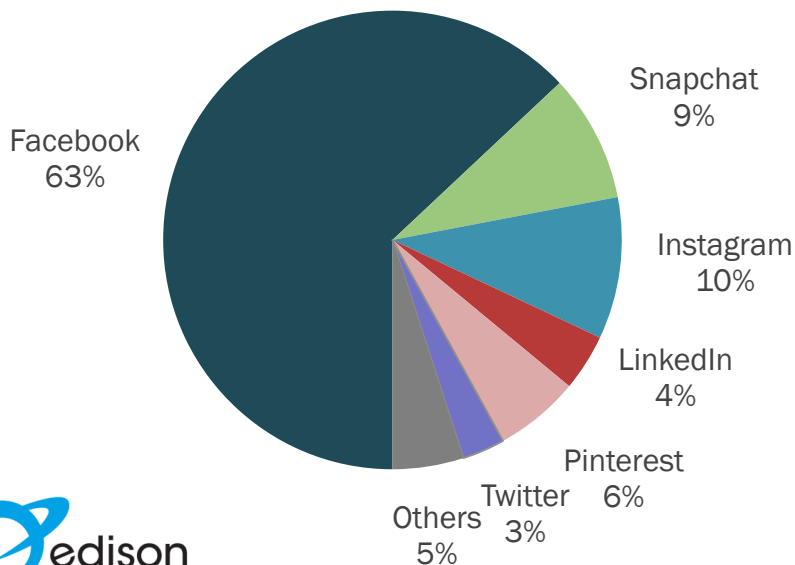
Facebook Usage



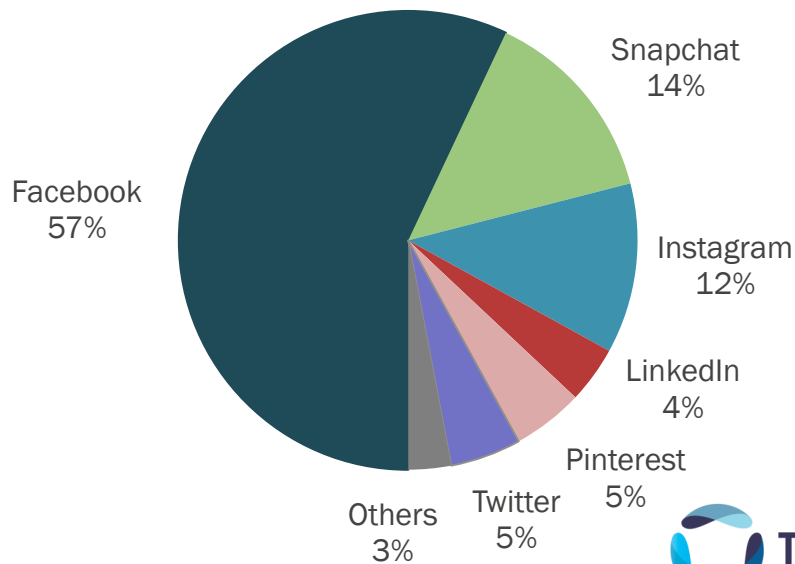
Social Media Brand Used Most Often

Base: Age 12+ and currently ever use Facebook, Snapchat, Twitter, Instagram, Pinterest, or LinkedIn

2017



2018





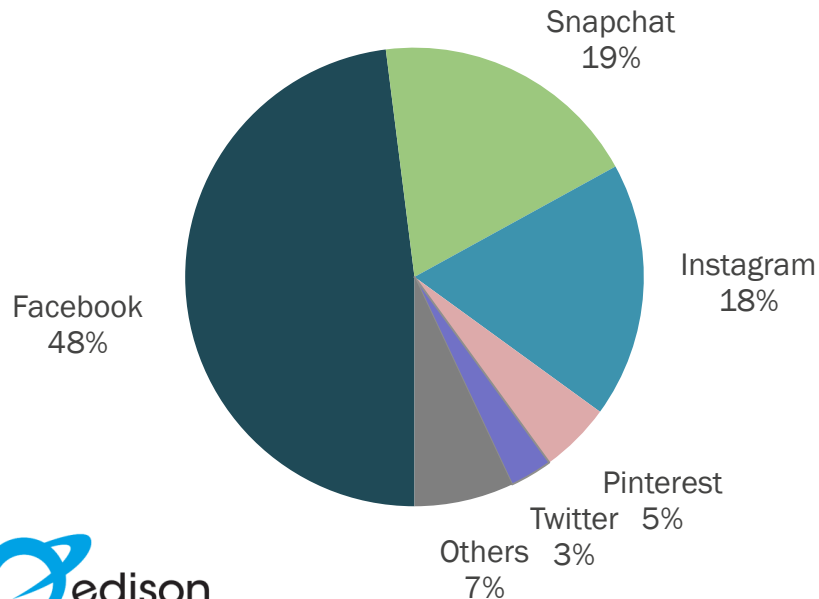
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Social Media Brand Used Most Often (Age 12-34)

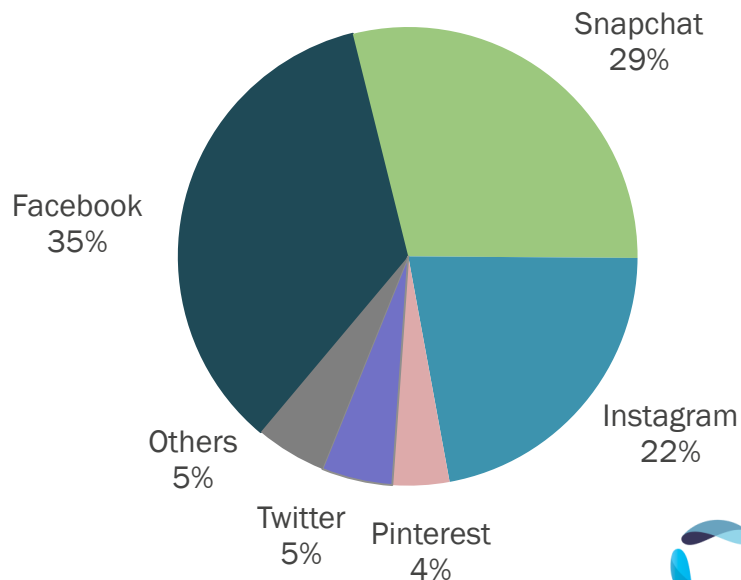
#InfiniteDial

Base: Currently ever use Facebook, Snapchat, Twitter, Instagram, Pinterest, or LinkedIn

2017



2018



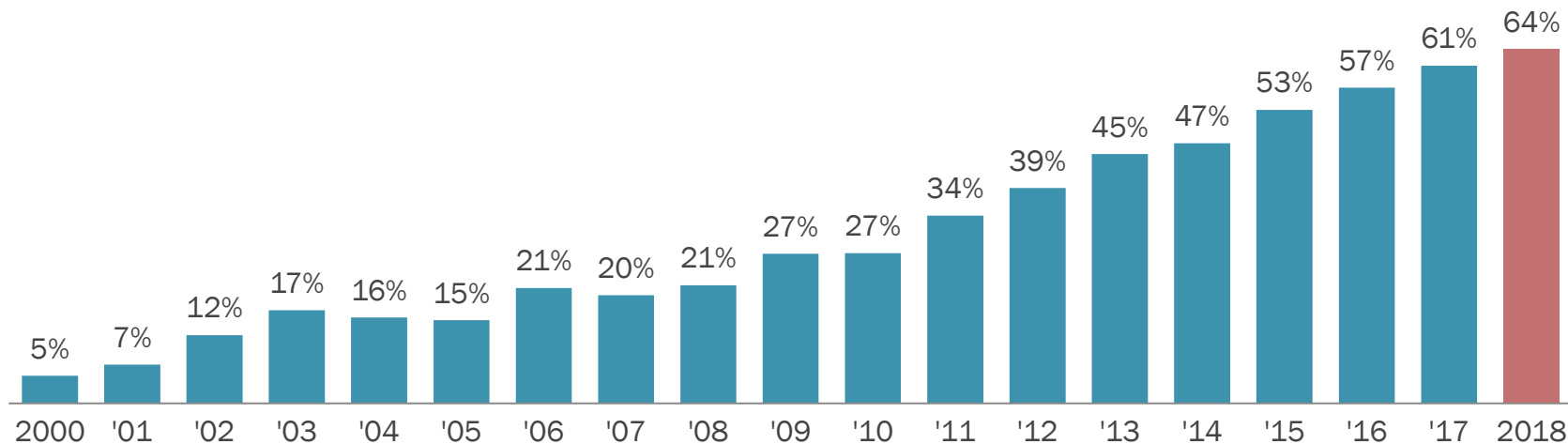


ONLINE AUDIO

Monthly Online Audio Listening

Total Population 12+

Estimated
180 Million

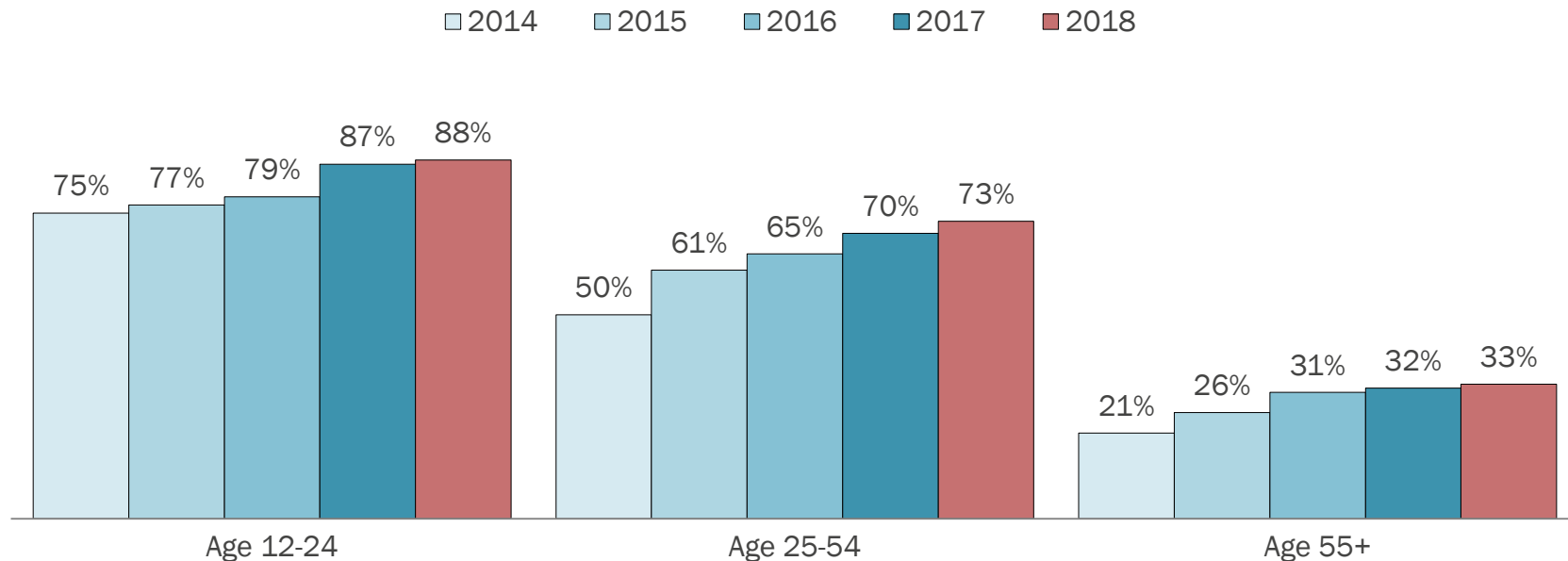


% listening to Online Audio in last month

Online Audio = Listening to AM/FM radio stations online and/or listening to streamed audio content available only on the Internet

The Infinite Dial © 2018 Edison Research and Triton Digital

Monthly Online Audio Listening



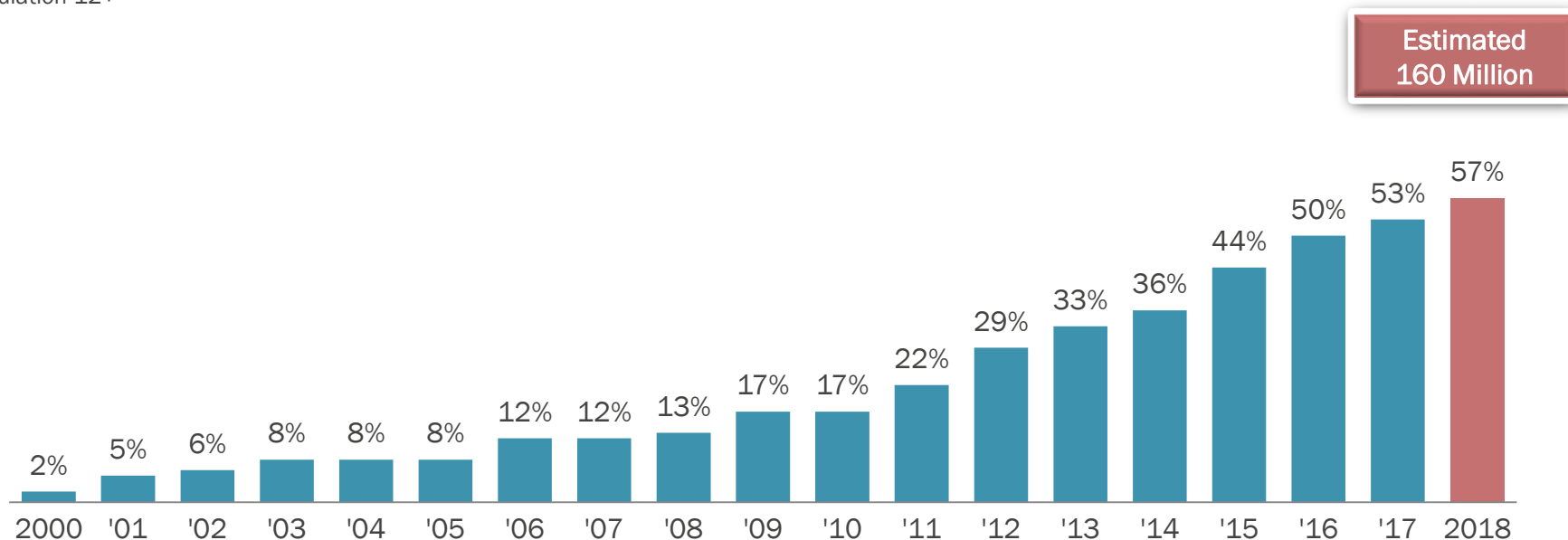
% listening to Online Audio in last month

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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Weekly Online Audio Listening

Total Population 12+



Estimated
160 Million

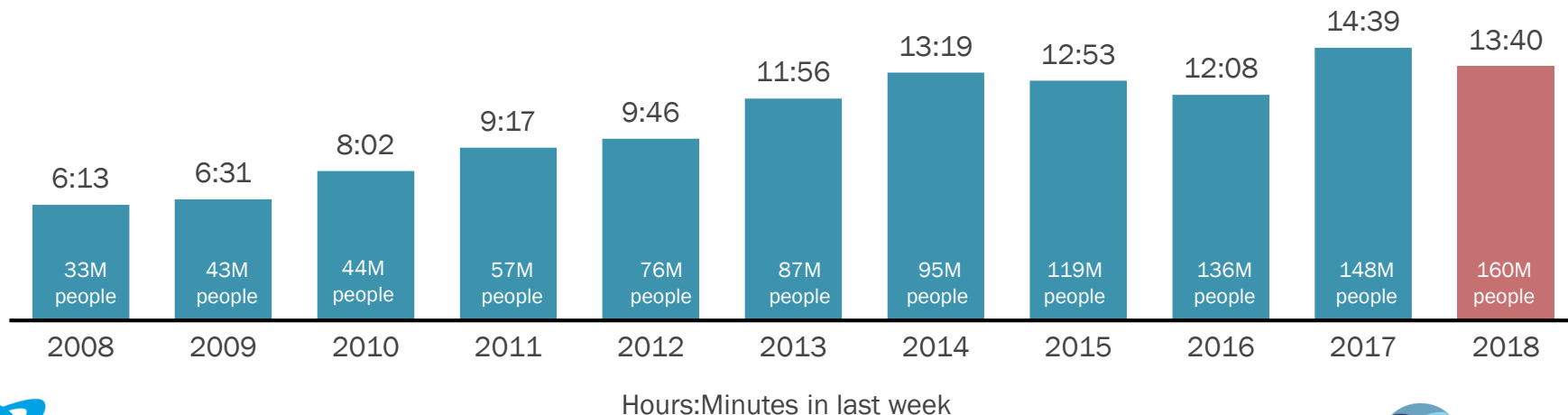


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Average Time “Weekly Online Audio Listeners” Spend Listening to Online Audio

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Base: Weekly Online Audio Listeners



Online Audio = Listening to AM/FM radio stations online and/or listening to streamed audio content available only on the Internet

The Infinite Dial © 2018 Edison Research and Triton Digital





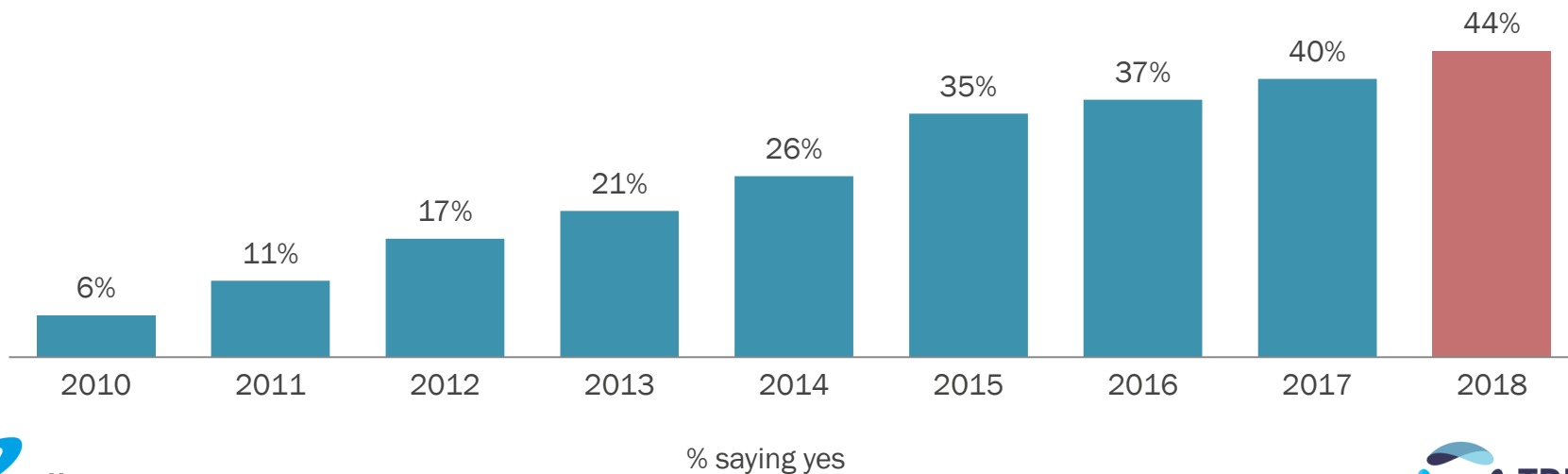
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Online Audio Listening in Car

“Have you ever listened to Internet Audio in a car by listening to the stream from a cell phone that you have connected to a car audio system?”

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Base: Own a cell phone; 95%

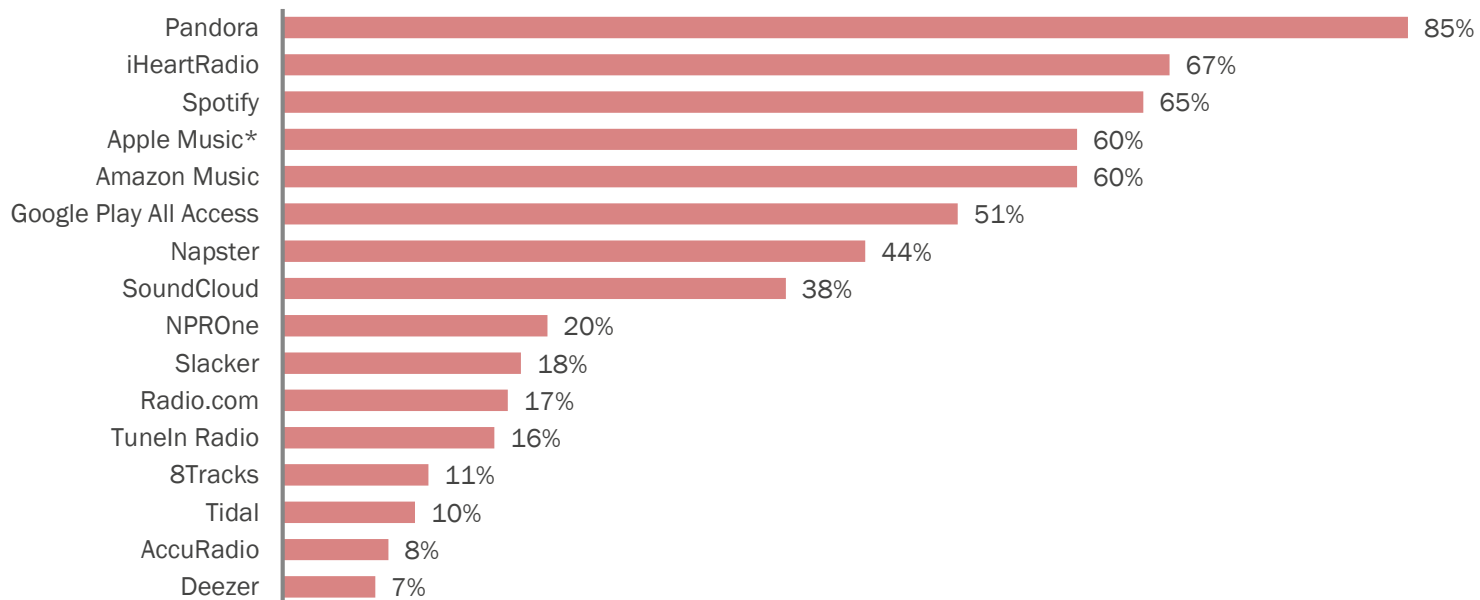




AUDIO BRANDS

Audio Brand Awareness

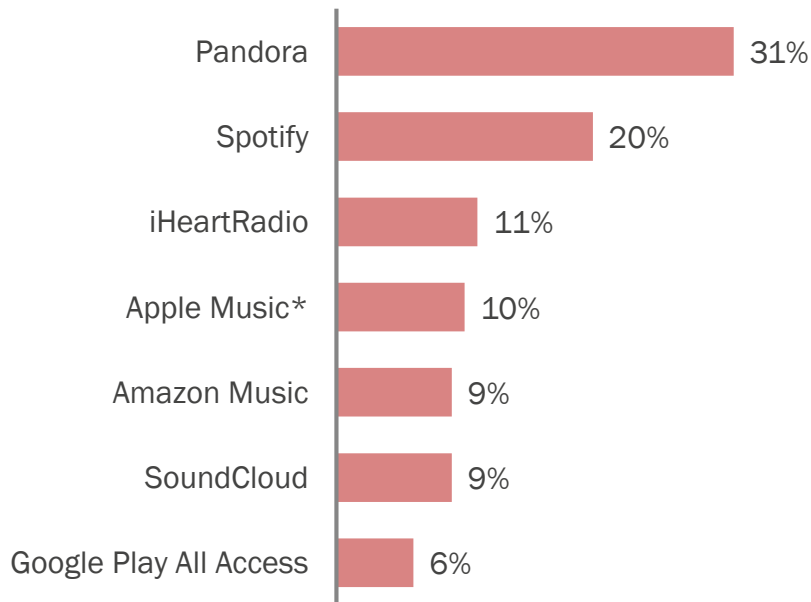
Total Population 12+



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

Listened in the last month to...

Total Population 12+

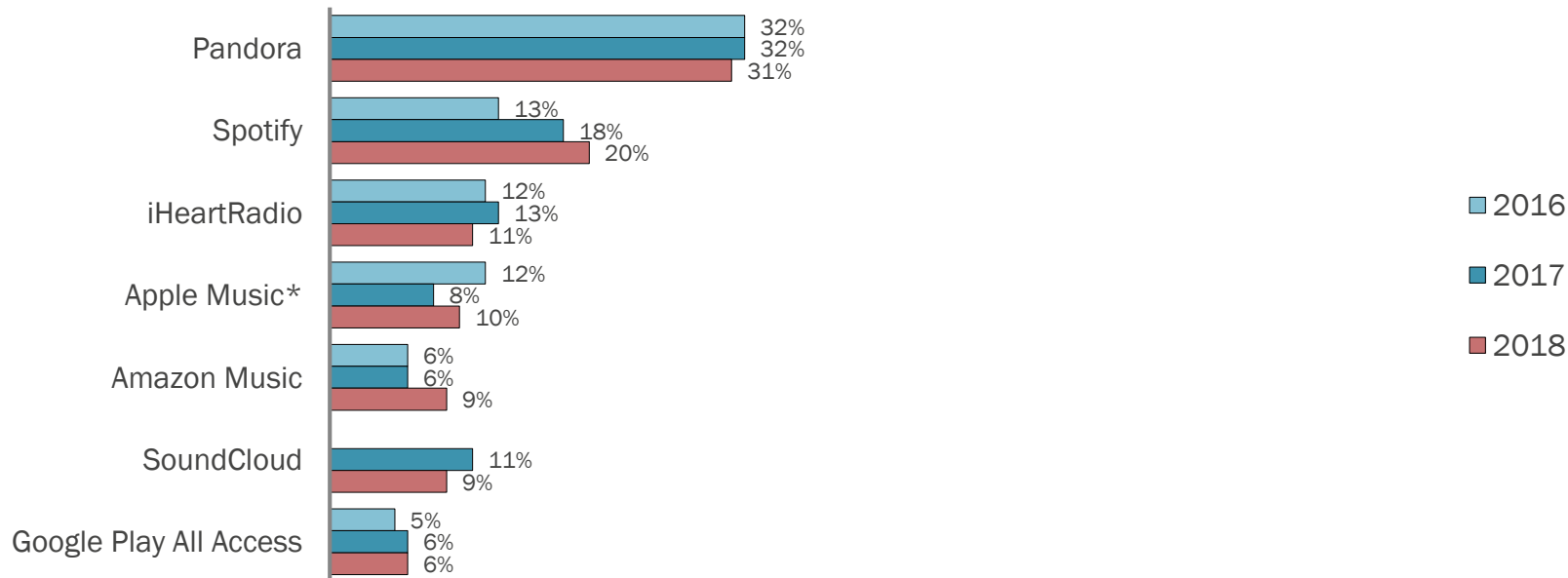


Brands lower than 6% Age 12+ not shown

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

Listened in the last month to...

Total Population 12+



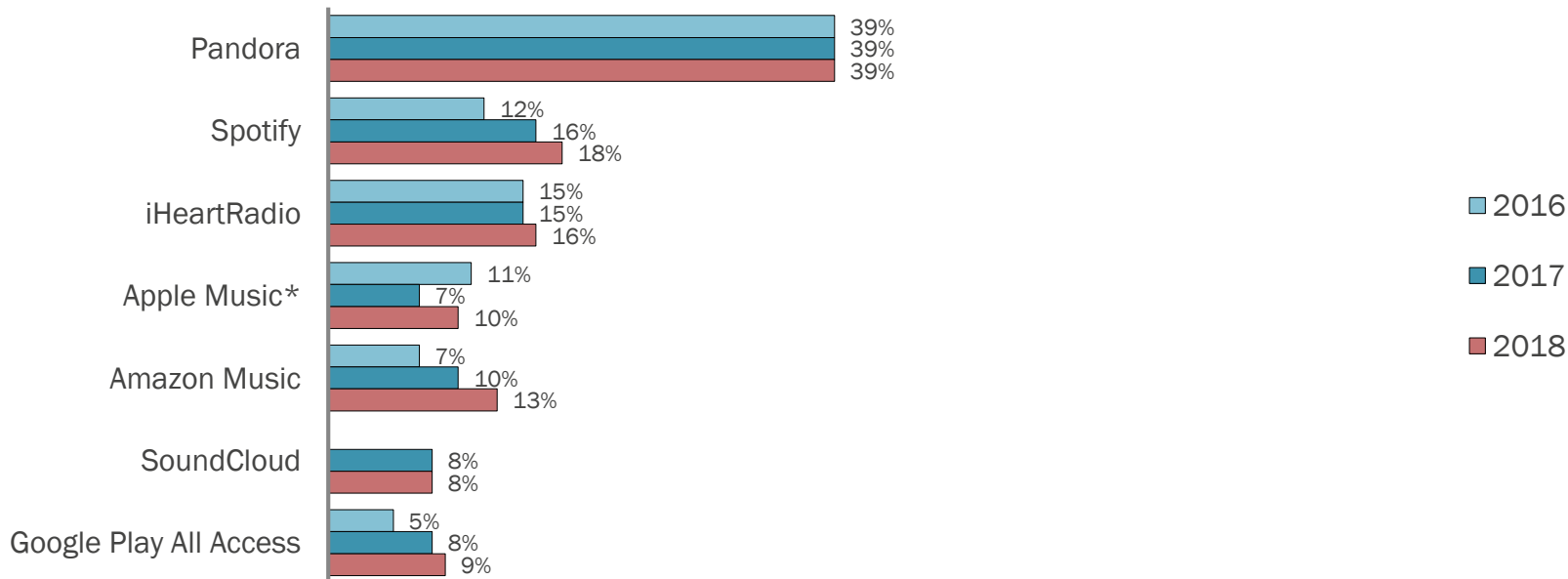
*2016: "Asked as Apple Music, formerly known as iTunes Radio"
2017-2018: *Asked as Apple Music, the paid music subscription from Apple



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Listened in the last month to... (Age 25-54)

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*2016: "Asked as Apple Music, formerly known as iTunes Radio"
2017-2018: "Asked as Apple Music, the paid music subscription from Apple"

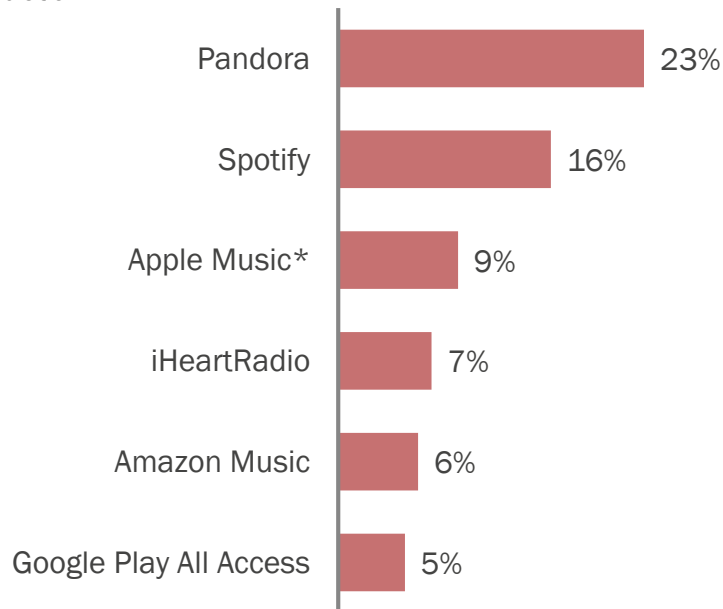


% listened in last month



Listened in the last week to...

Total Population 12+

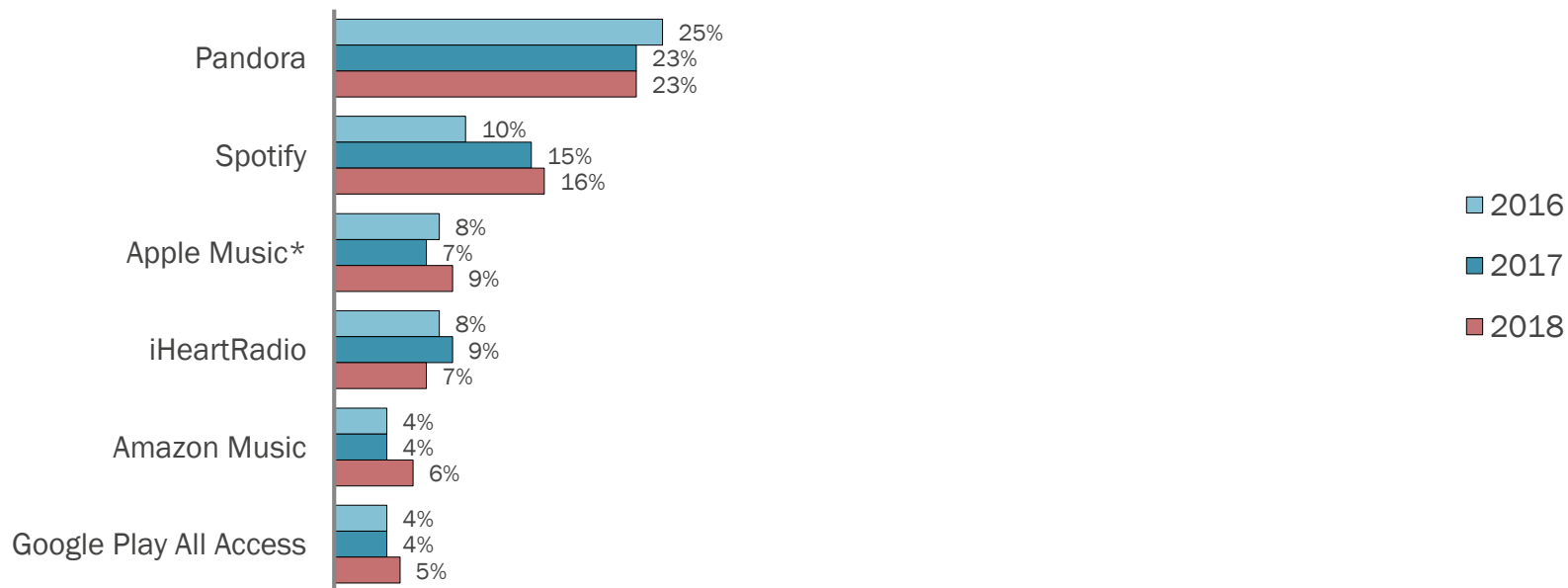


Brands lower than 5% Age 12+ not shown

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

Listened in the last week to...

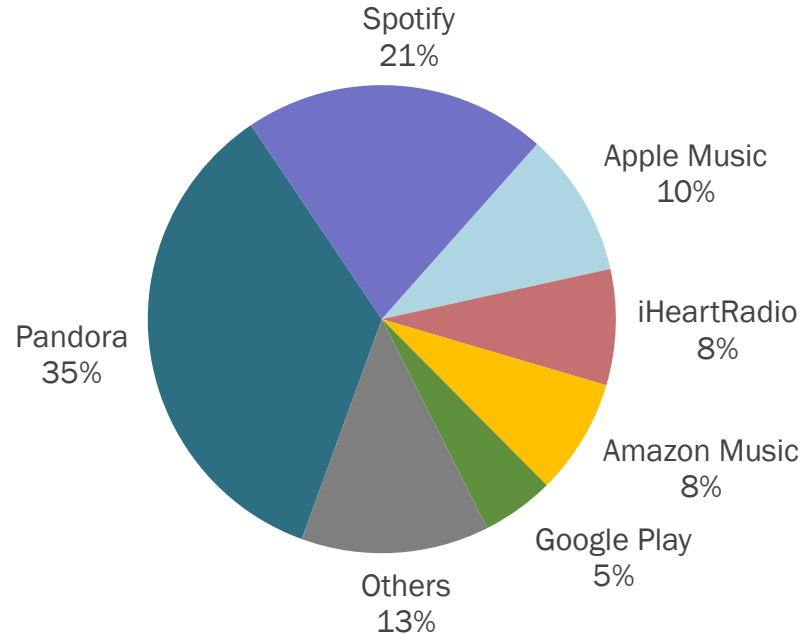
Total Population 12+



*2016: "Asked as Apple Music, formerly known as iTunes Radio"
2017-2018: "Asked as Apple Music, the paid music subscription from Apple"

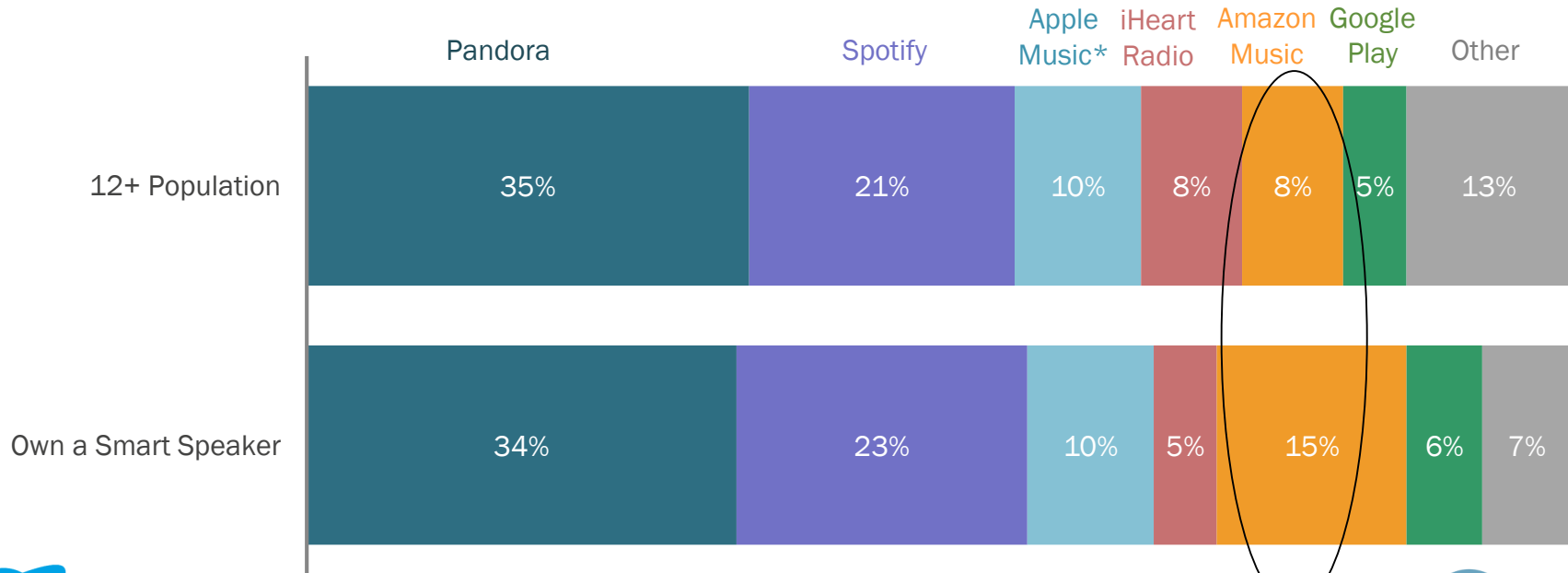
Audio Brand Used Most Often

Base: Currently ever use any audio brand



Audio Brand Used Most Often

Base: Currently ever use any audio brand

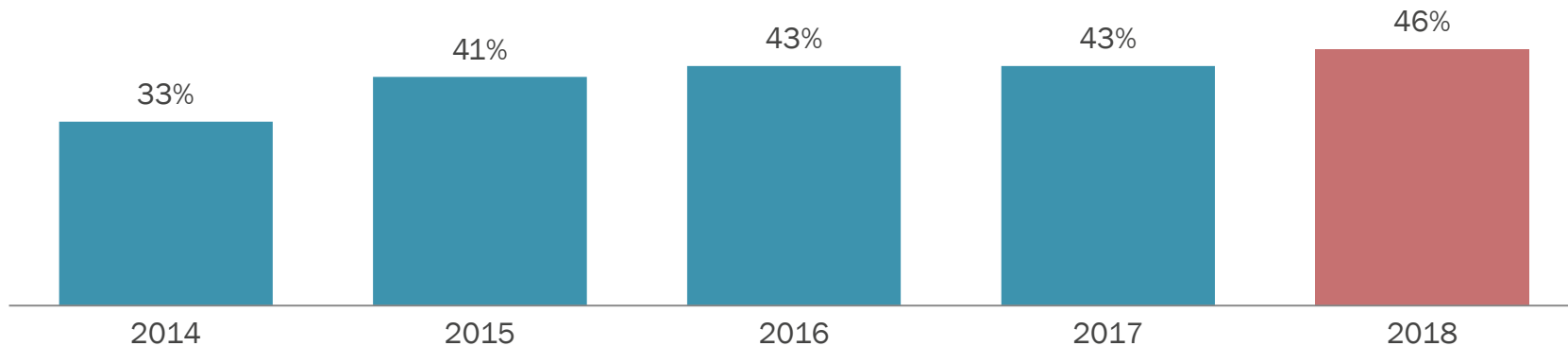


Weekly YouTube Usage

"Have you used YouTube to watch music videos or listen to music in the last week?"

Total Population 12+

Estimated
129 Million

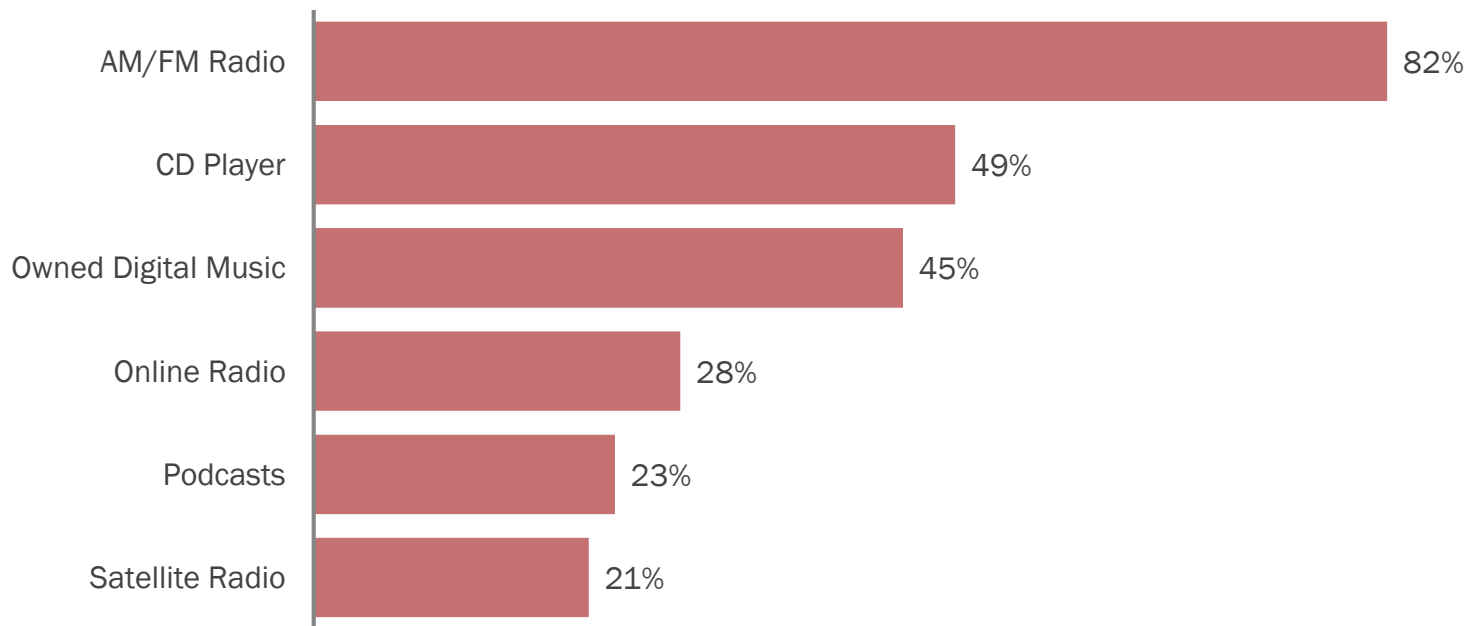




IN-CAR MEDIA

Audio Sources Used in Car

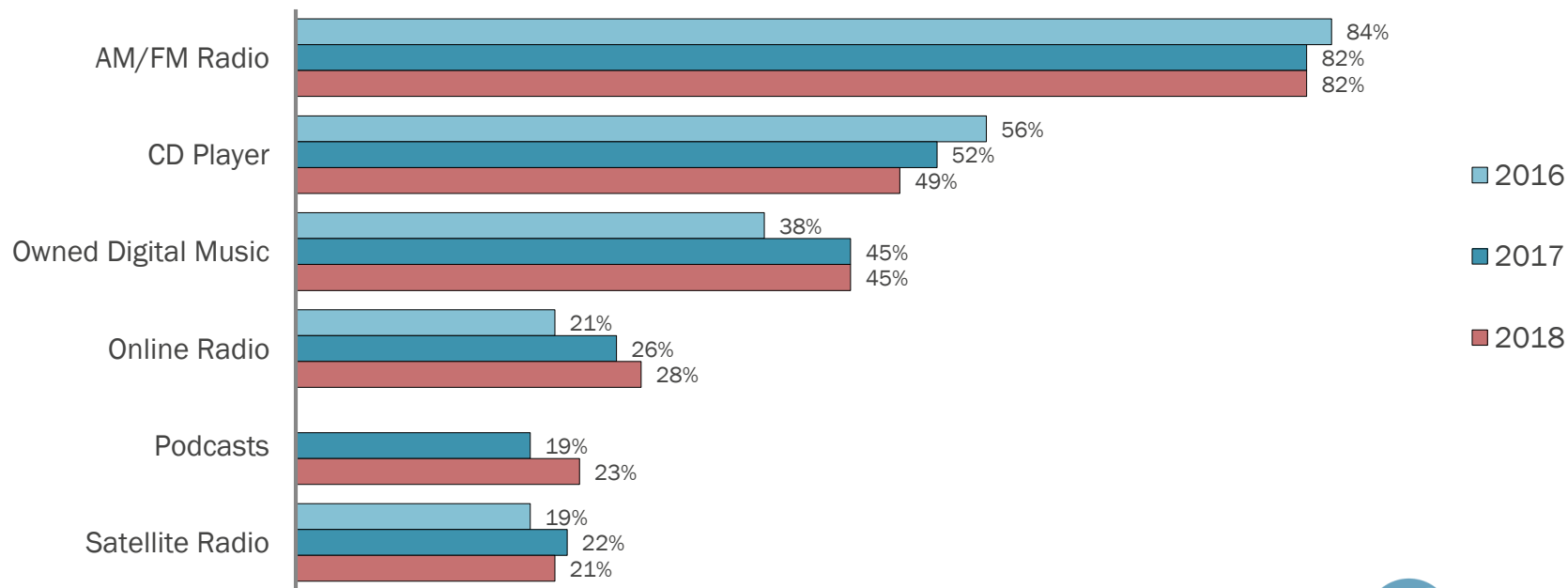
Base: Age 18+ and has driven/ridden in car in last month; 88%



% currently ever using audio source in car

Audio Sources Used in Car

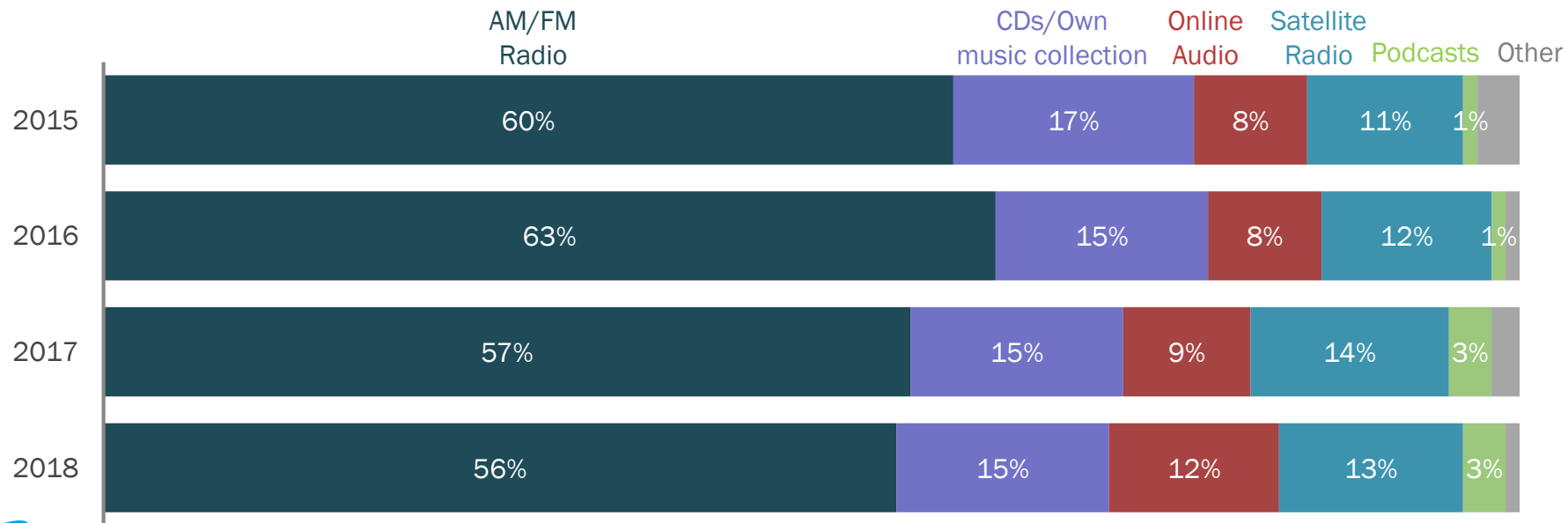
Base: Age 18+ and has driven/ridden in car in last month; 88%



% currently ever using audio source in car

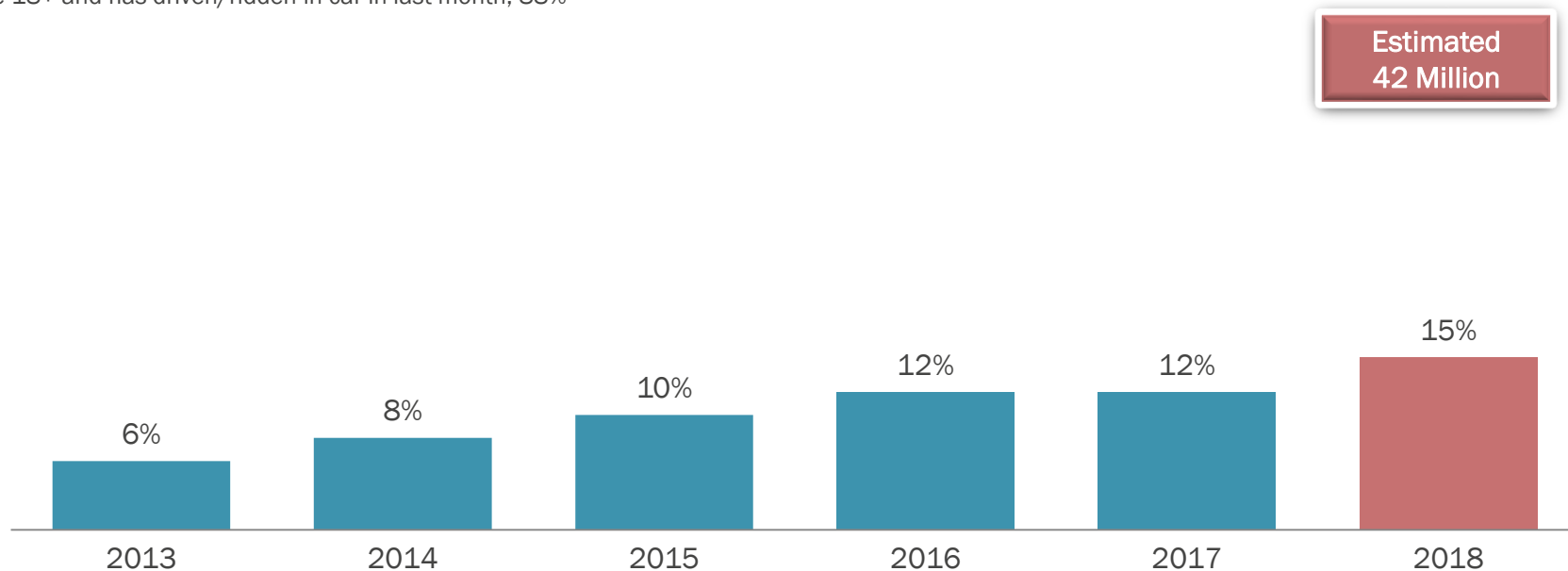
Audio Source Used Most Often in Car

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



In-Dash Information and Entertainment Systems

Base: Age 18+ and has driven/ridden in car in last month; 88%



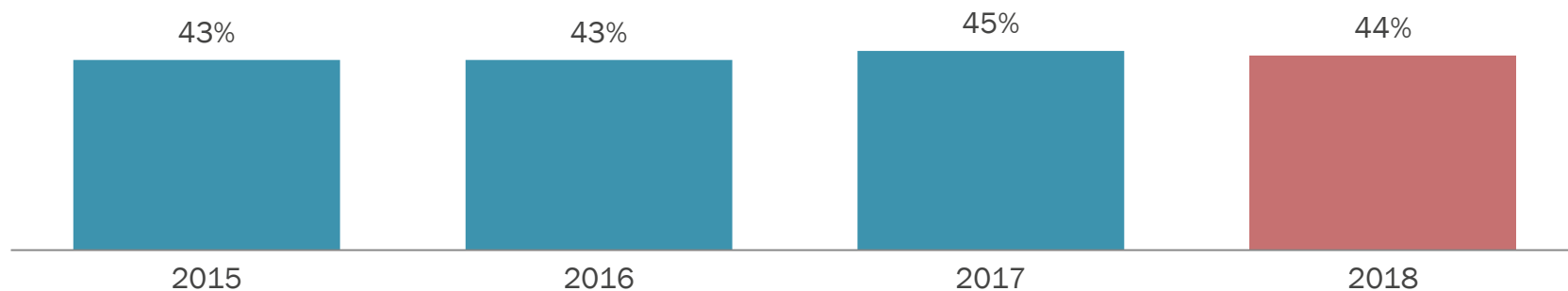


AUDIOBOOKS

Audiobook Listening

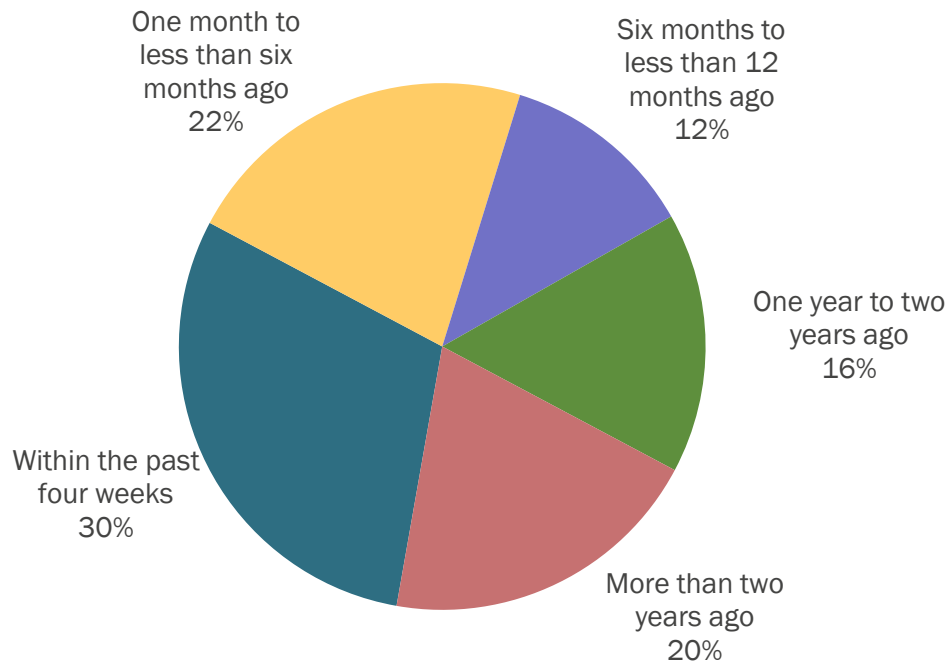
Total Population 12+

Estimated
124 Million



Last Listened to an Audiobook

Base: Ever listened to an audiobook



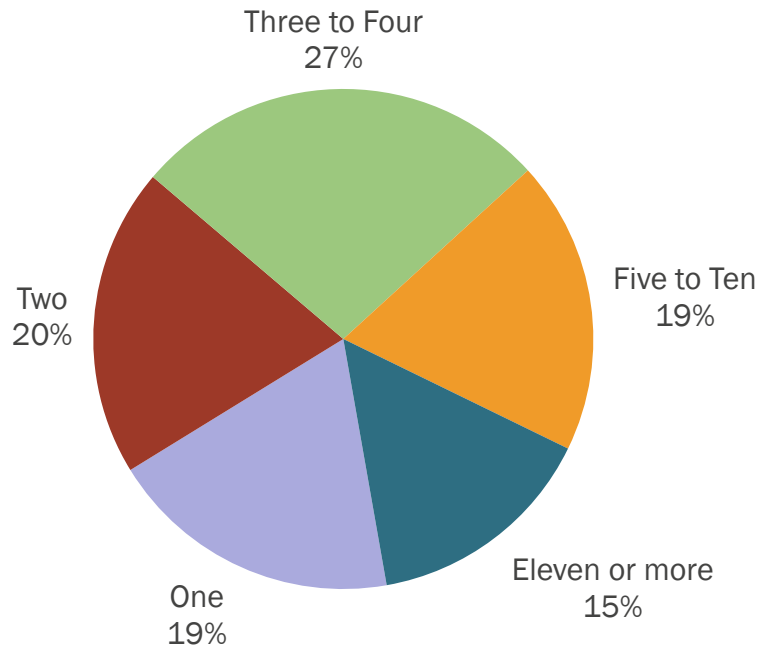


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Number of Audiobooks Listened to in Past 12 Months

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Base: Listened to audiobook in past 12 months



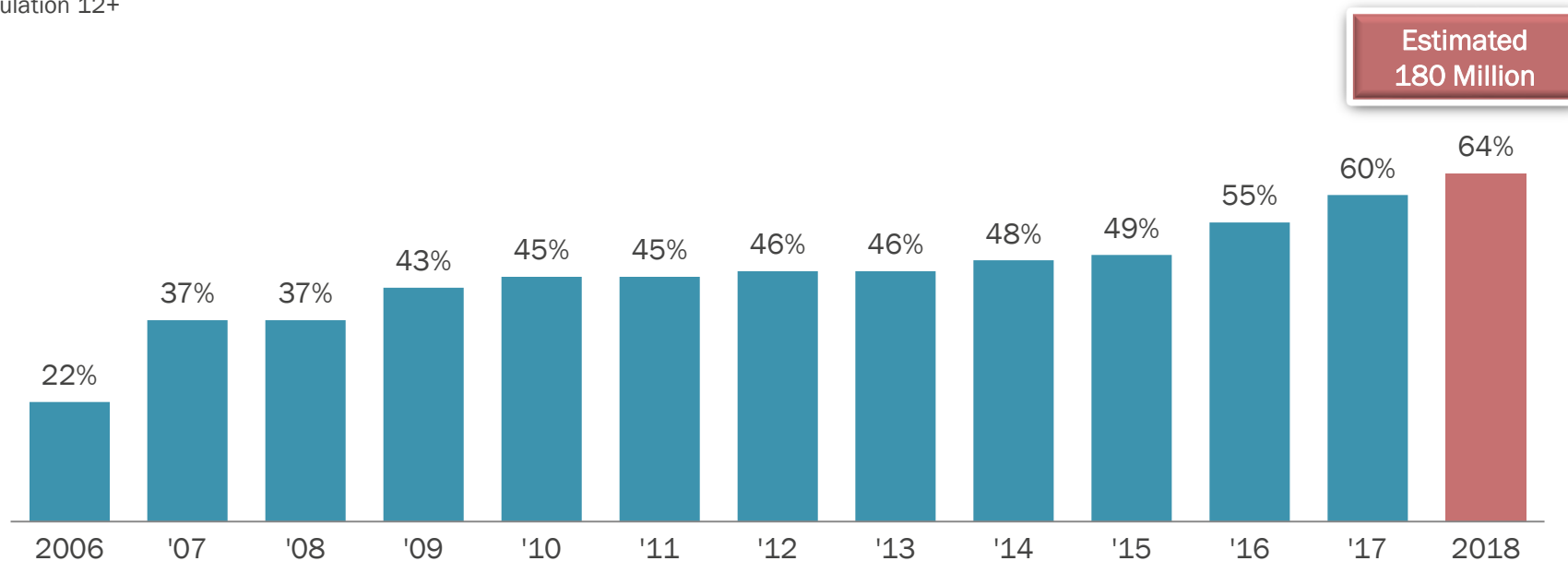
Median of
three audiobooks
listened to



PODCASTING

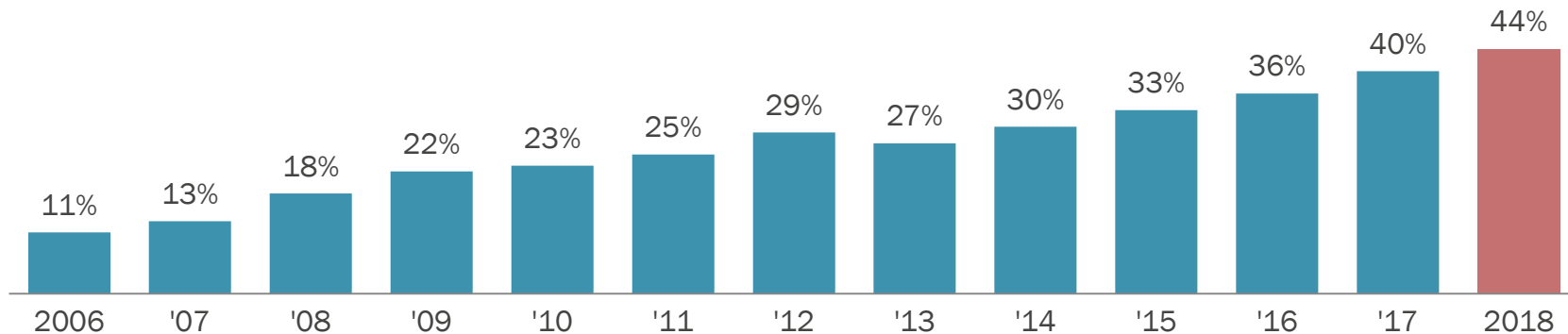
Podcasting Familiarity

Total Population 12+



Total Population 12+

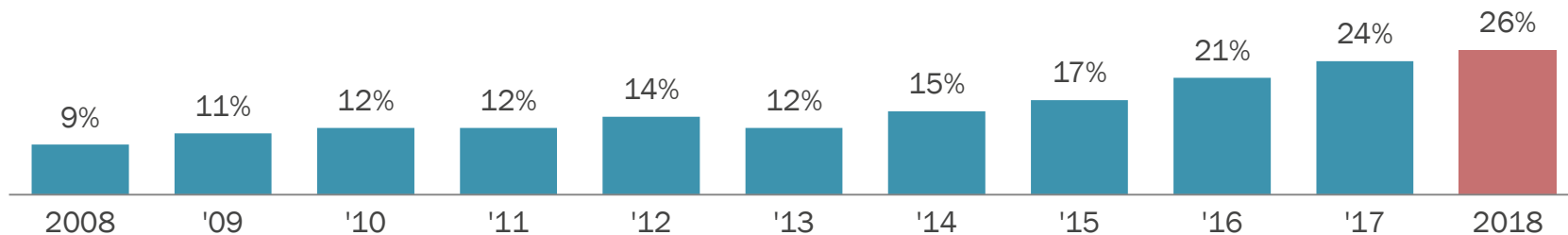
Estimated
124 Million



Monthly Podcast Listening

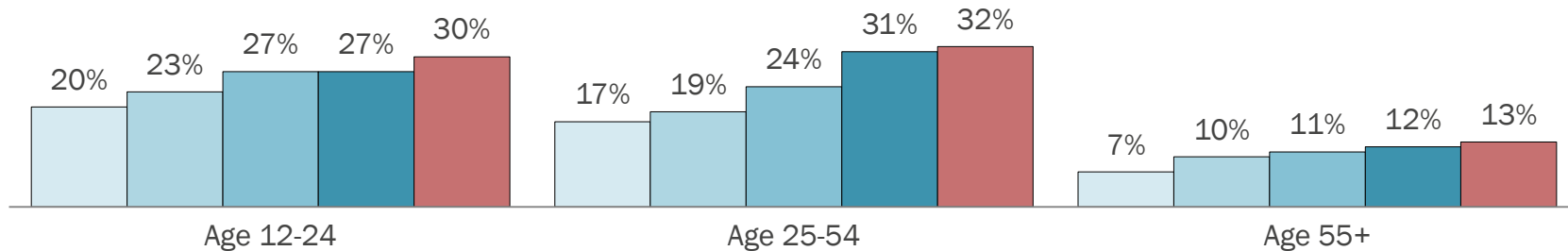
Total Population 12+

Estimated
73 Million



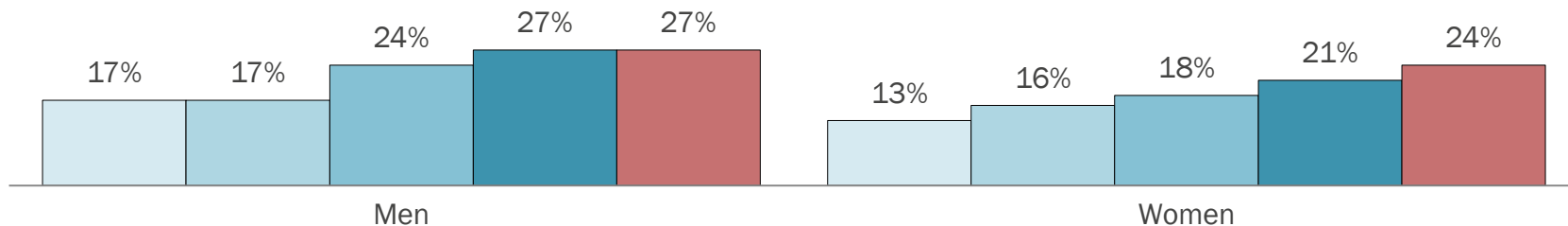
Monthly Podcast Listening

2014 2015 2016 2017 2018



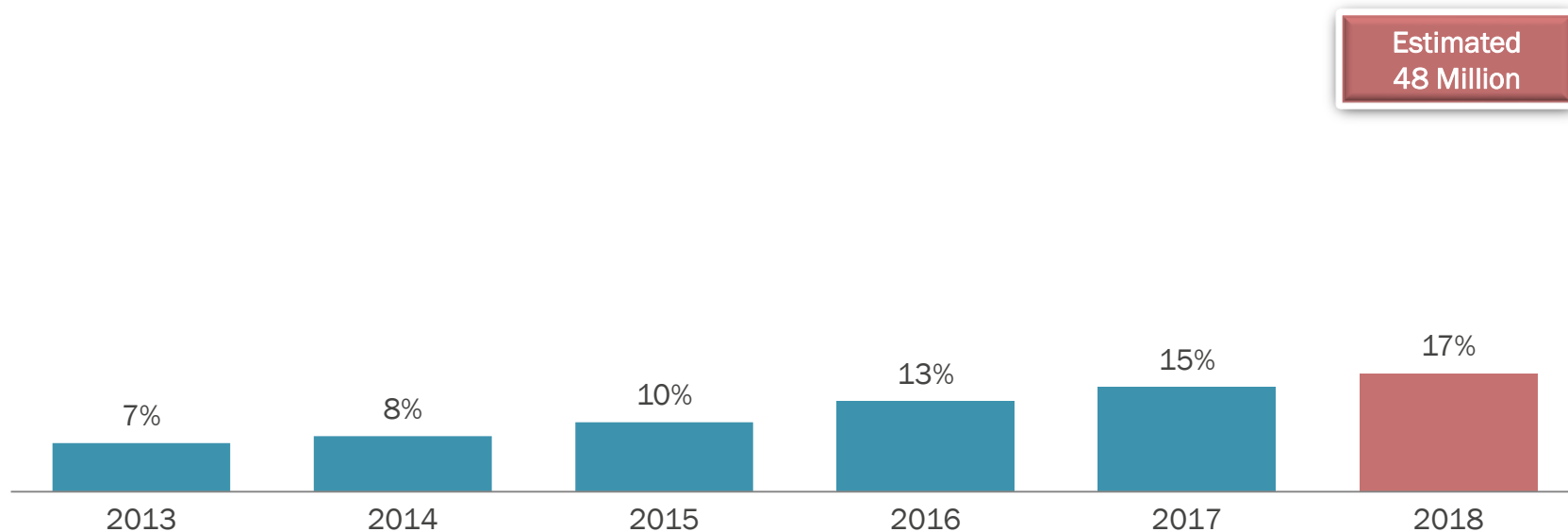
Monthly Podcast Listening

2014 2015 2016 2017 2018



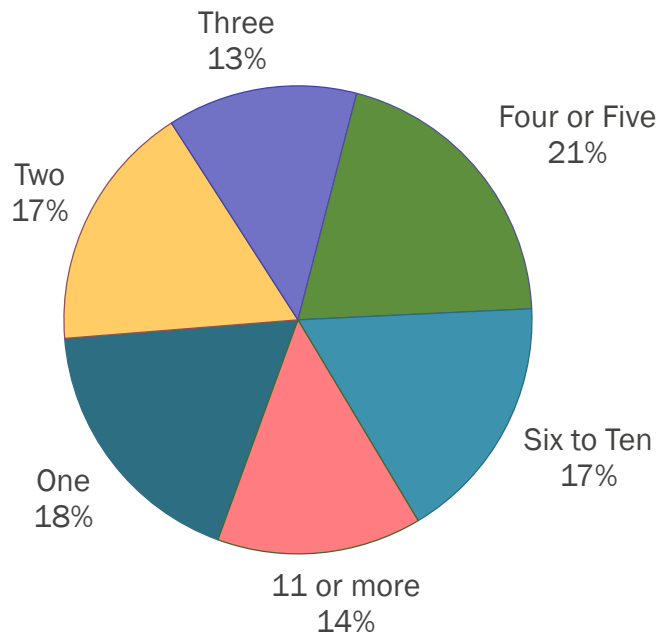
Weekly Podcast Listening

Total Population 12+



Number of Podcasts Listened to in Last Week

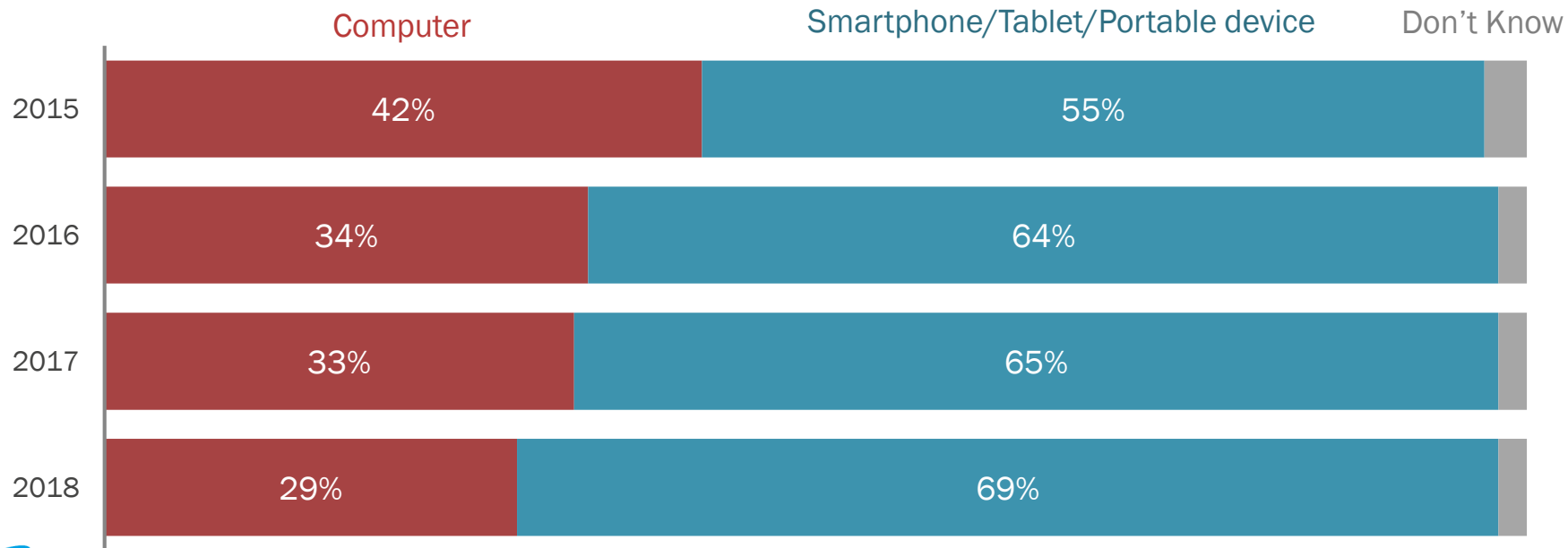
Base: Weekly Podcast Listeners



Average of seven
podcasts listened
per week

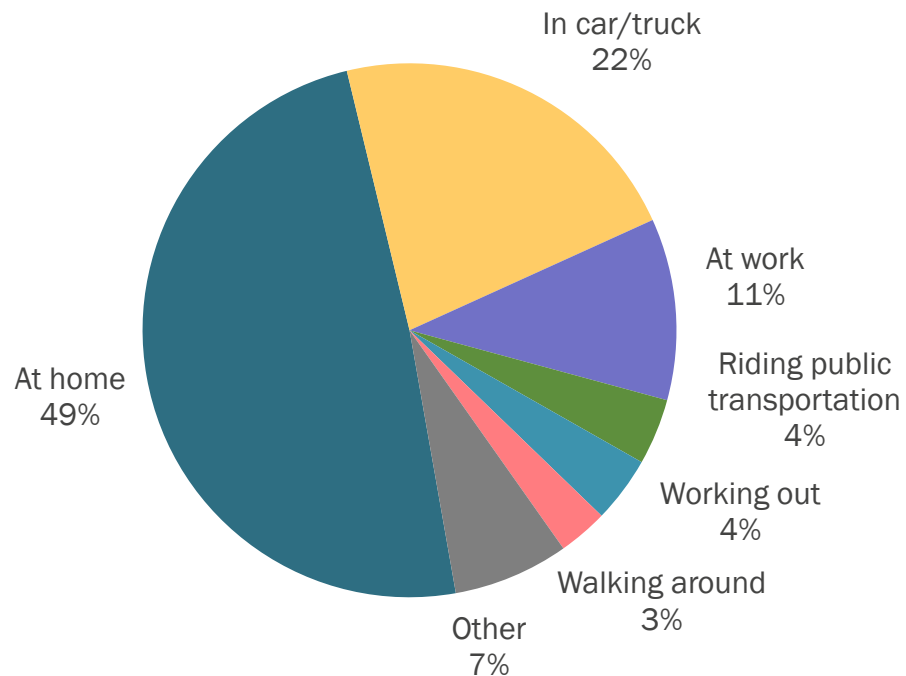
Device Used Most Often to Listen to Podcasts

Base: Ever Listened to a Podcast



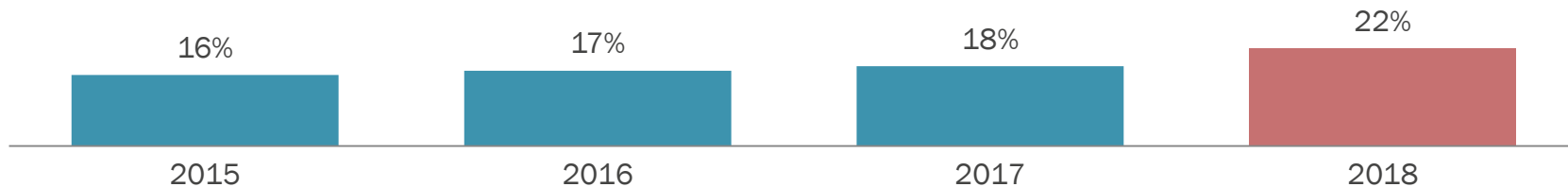
Location Listened to Podcasts Most Often

Base: Ever Listened to a Podcast



Listen to Podcast Most Often in Car/Truck

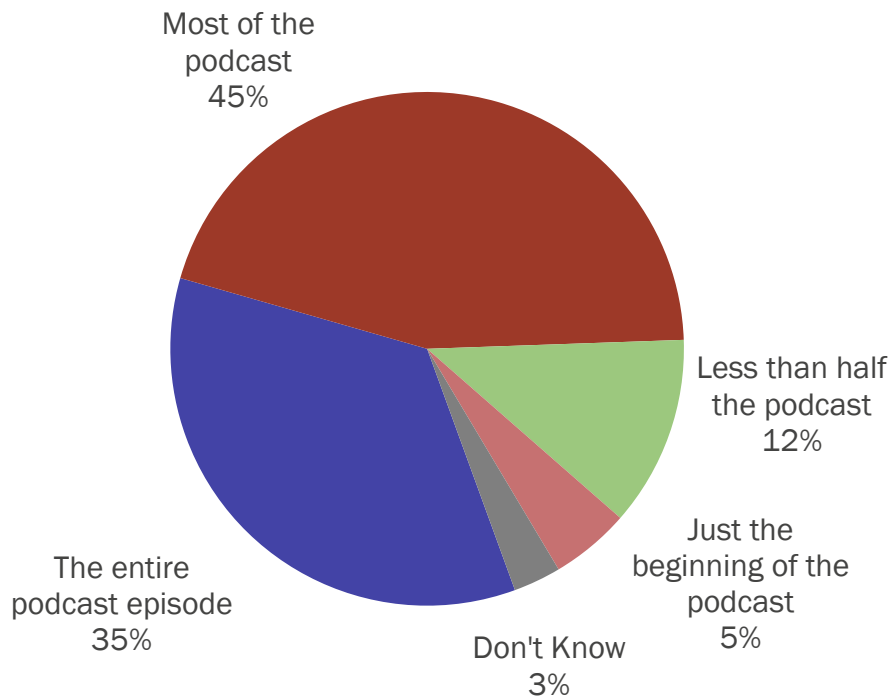
Base: Ever Listened to a Podcast



Podcasting Listening

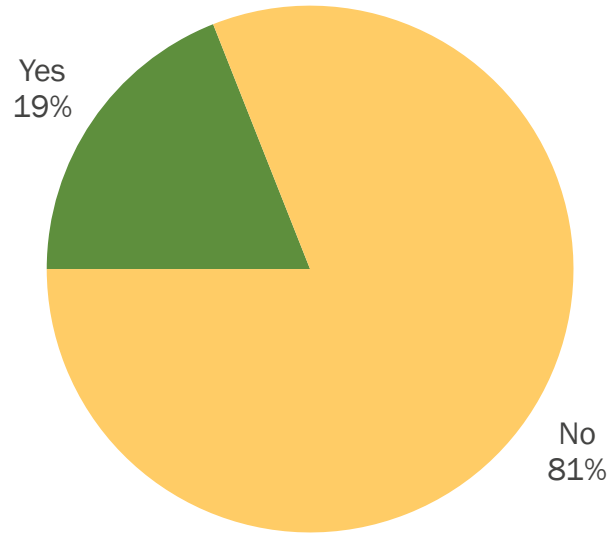
"Think about the podcast episodes you listen to. Do you typically listen to..?"

Base: Ever Listened to a Podcast



Increasing Podcast Playback Speed

“Do you ever increase the speed of your podcasts in order to listen to them faster?”



Base: Ever Listened to a Podcast

Smart Speaker adoption is growing at a faster rate than the early days of smartphones. Brands and advertisers need to quickly develop an audio strategy that accounts for this dramatic change.

While AM/FM radio faces a “home hardware challenge,” particularly among 18-34 year-olds, radio remains by far the dominant medium in the car.

The percentage of Americans who use social media has tapered off, led by the first-ever decline in Facebook usage. Facebook also experienced a dramatic fall-off as the "most-used" service amongst younger people.

In streaming audio, Pandora maintains a stable percentage of users and remains the category leader. Growth in Spotify, Apple Music, and Amazon Music are all contributing to the continued growth in audio consumption.

Podcasting continues its steady growth, with even more significant gains in the vehicle. After remaining fairly steady for several years, the number of podcasts consumed by weekly listeners has also gone up—matching the medium's increased Share of Ear.



Save the Date

#InfiniteDial

Infinite Dial Canada
April 4, 2018 at 2pm Eastern
Details to follow

Infinite Dial Australia
Late April 2018
Details to follow





THE INFINITE DIAL

2018

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