



# THE INFINITE DIAL

2016

#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 2016, The Infinite Dial tracks and covers new research on mobile behaviors, Internet Radio, Podcasting, Social Media and more.

# Study Methodology

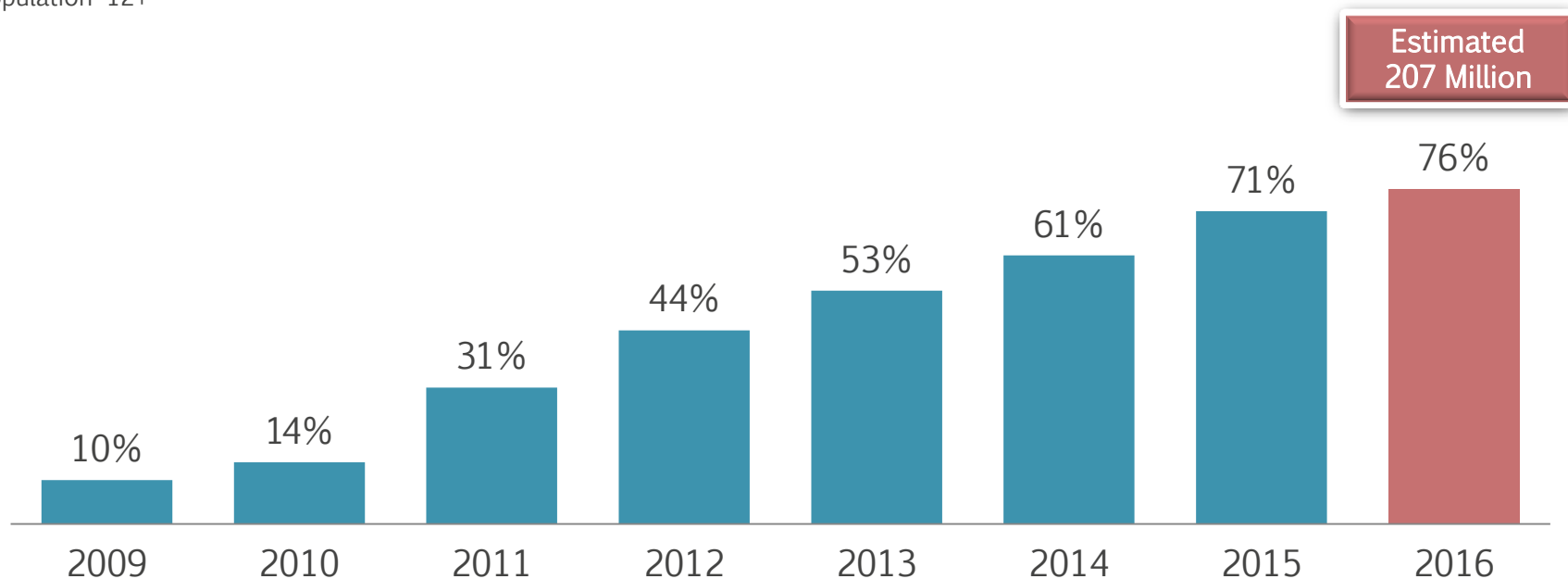
- In January/February 2016, Edison Research conducted a national telephone survey of 2001 people aged 12 and older, using random digit dialing techniques
- Interviews were 52% landline and 48% cell phone
- Survey offered in both English and Spanish languages
- Data weighted to national 12+ population figures



# MEDIA & TECHNOLOGY

# Smartphone Ownership

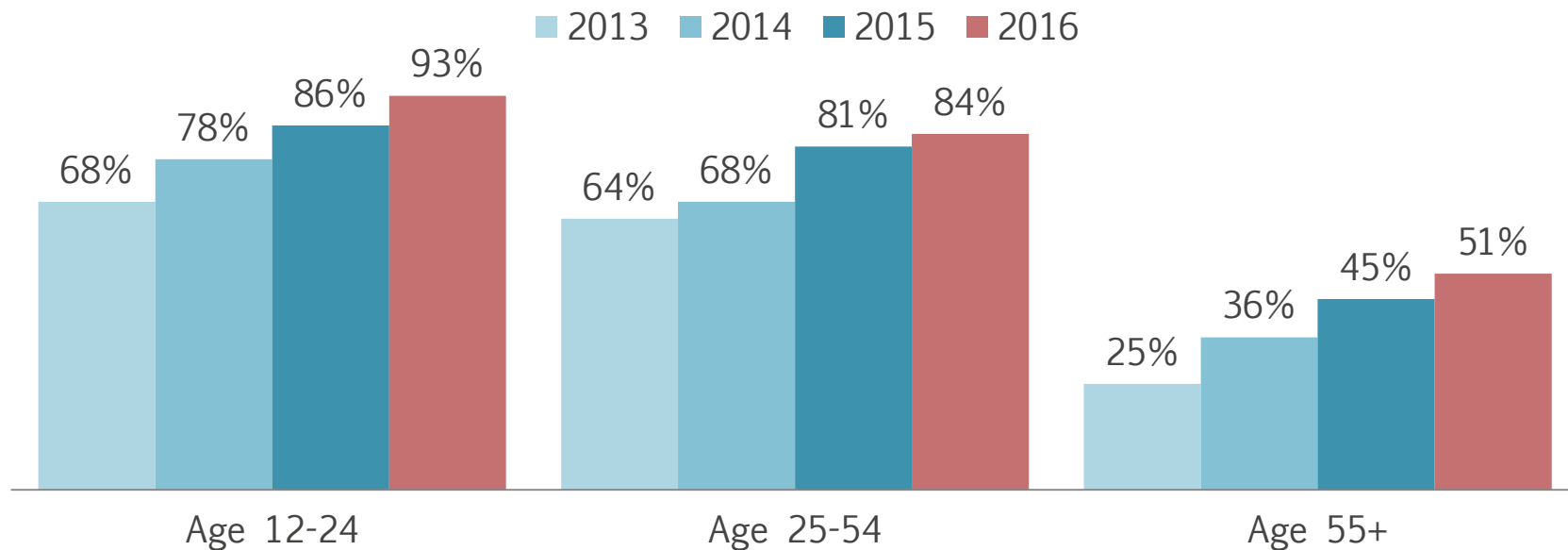
Total Population 12+





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# Smartphone Ownership

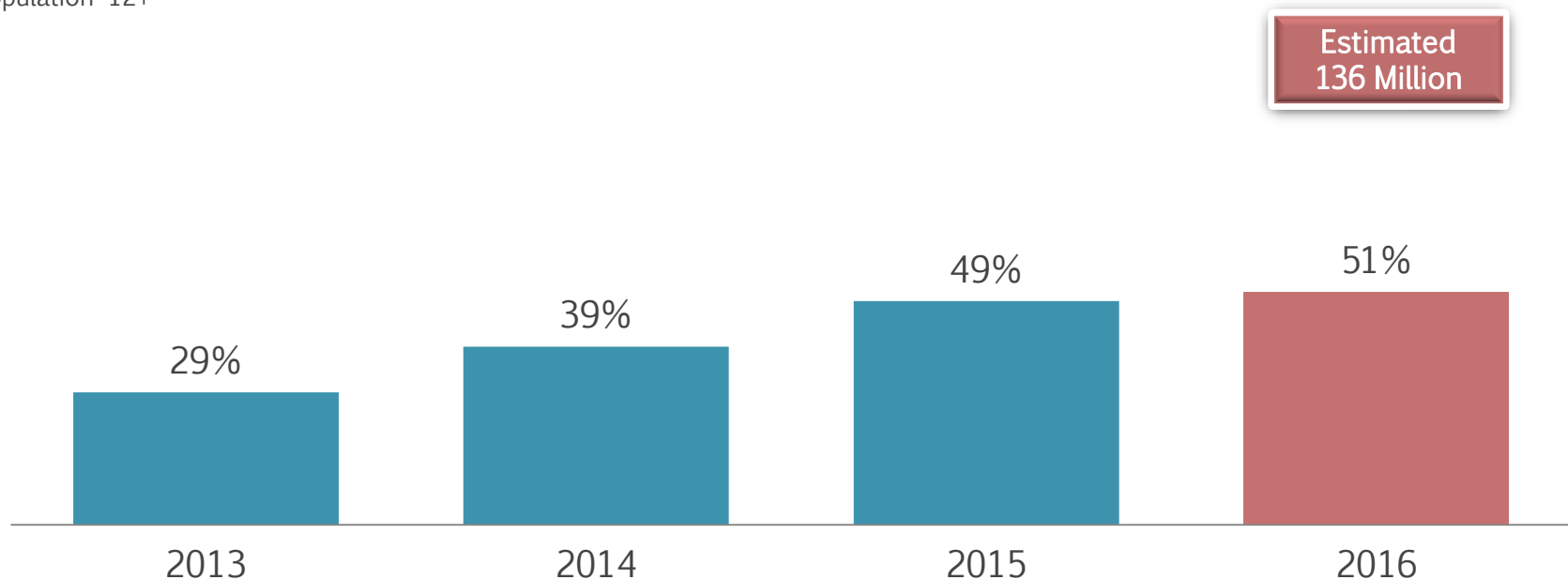


% owning a smartphone



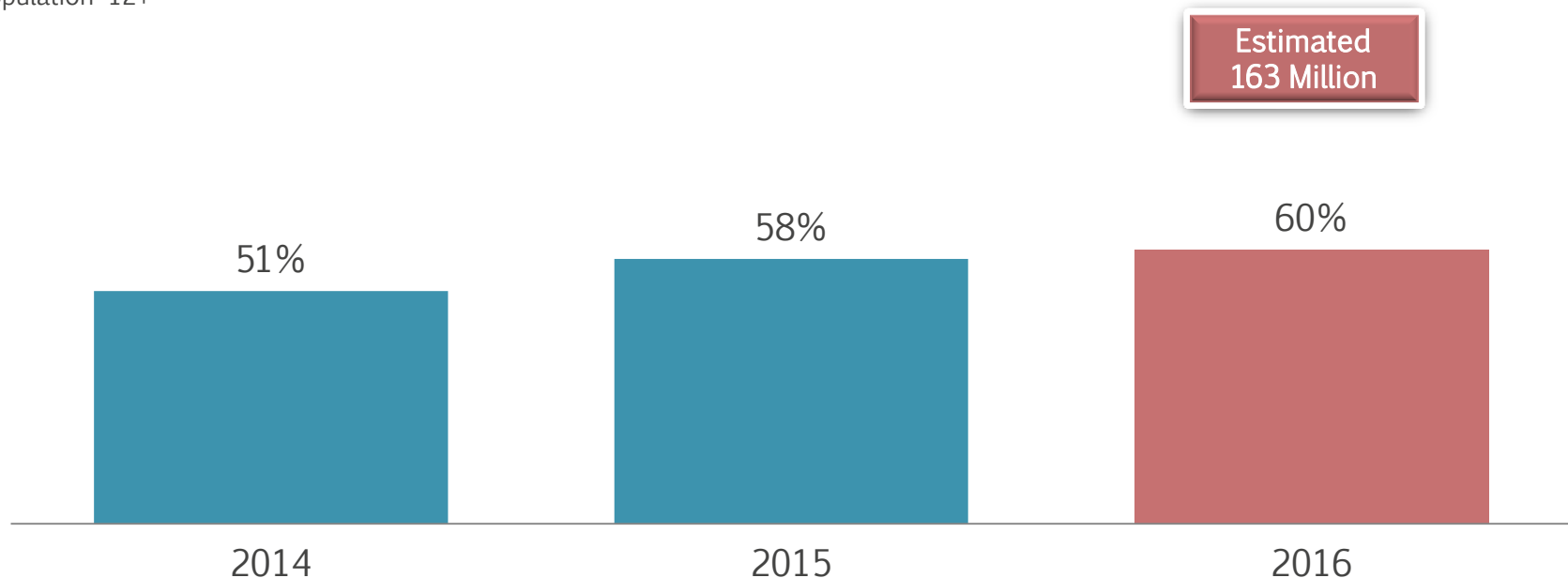
# Tablet Ownership

Total Population 12+



# Internet-Connected TV Ownership

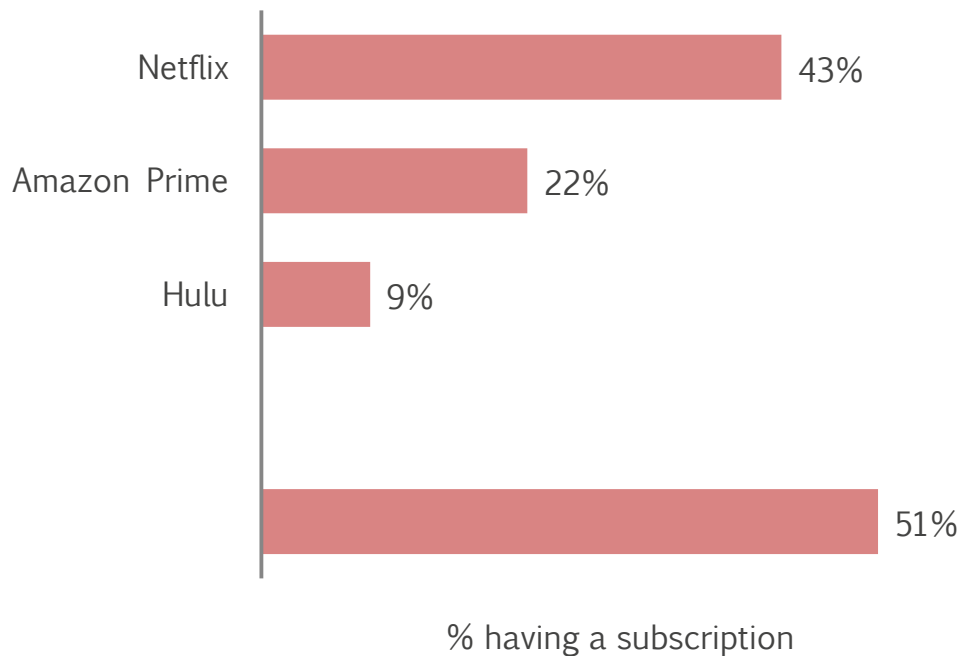
Total Population 12+





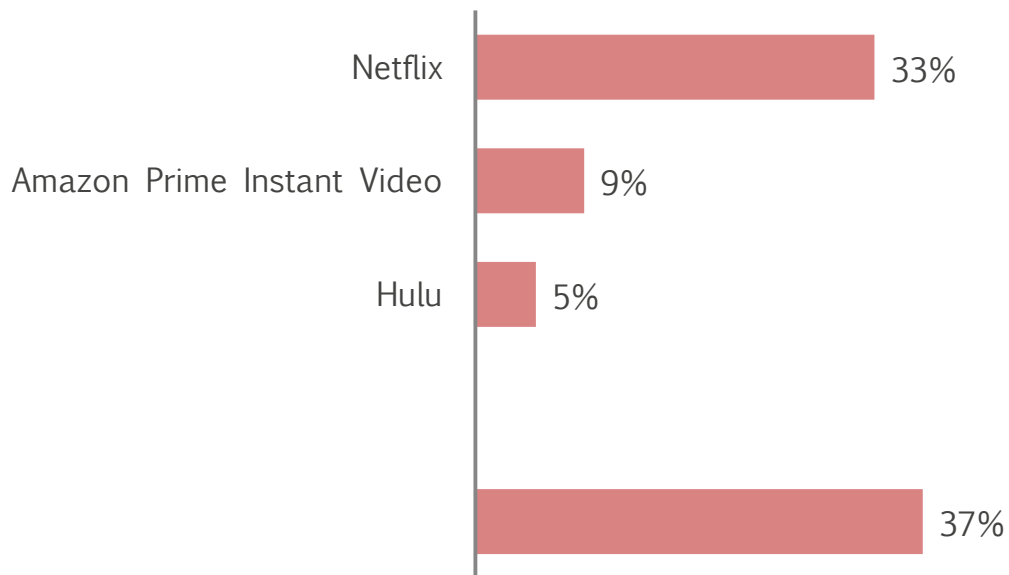
# On-Demand Video Service Subscription

Total Population 12+



# Used On-Demand Video Service in Last Week

Total Population 12+



% subscribing and using service in last week



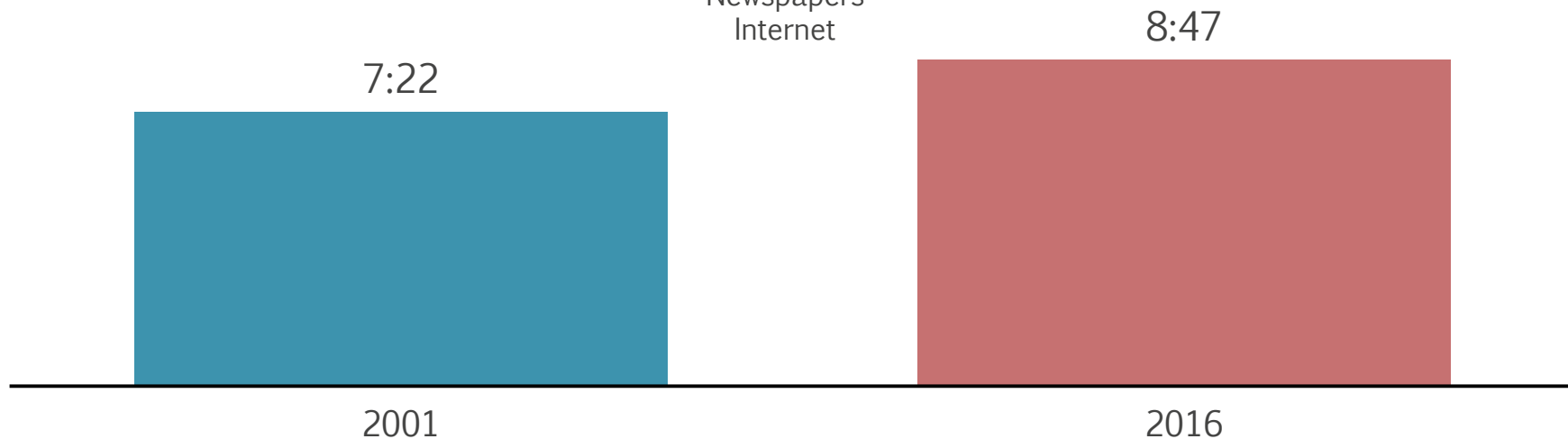
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# Total Perceived Time Spent with Media in Past 24 Hours

Total Population 12+

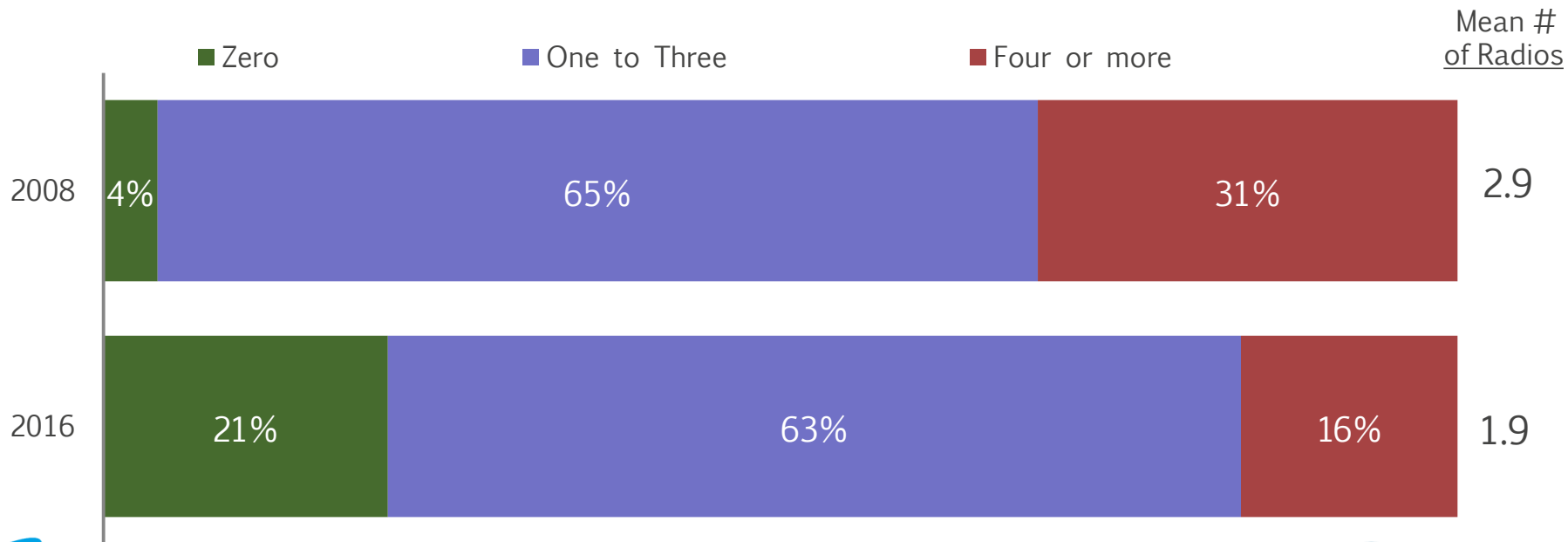
Sum of self-reported time spent with:

Television  
Radio  
Newspapers  
Internet

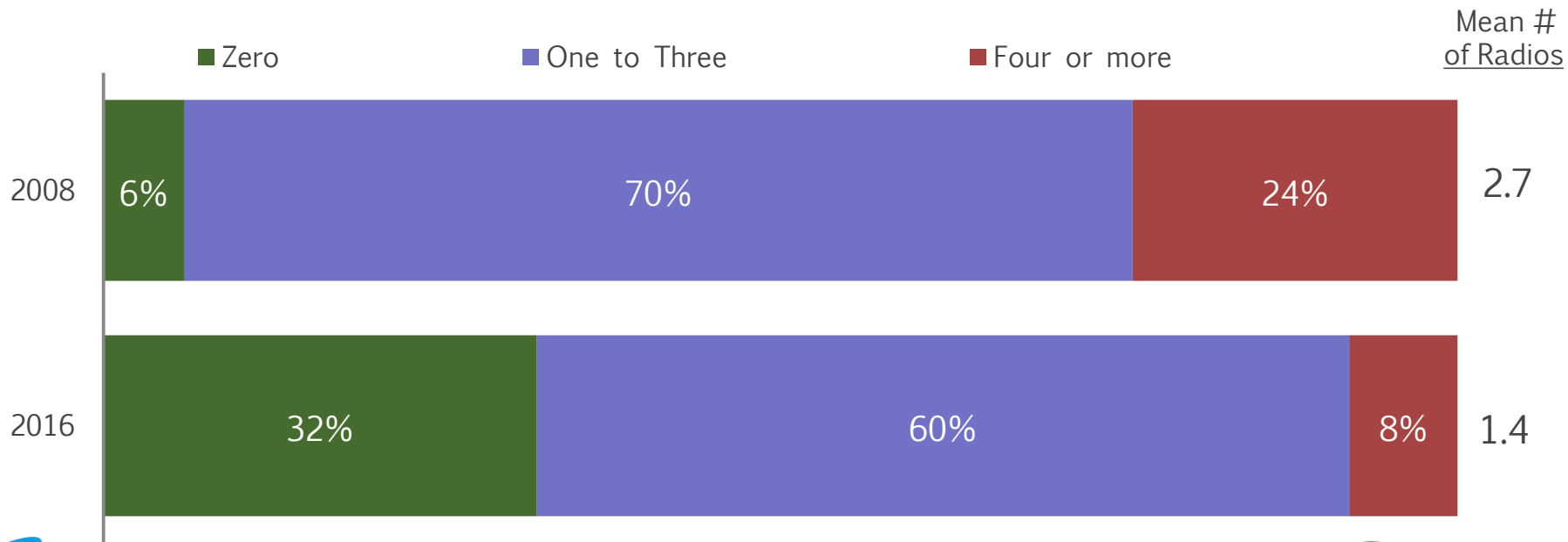


# Number of Radios Owned in Home

Total Population 12+



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

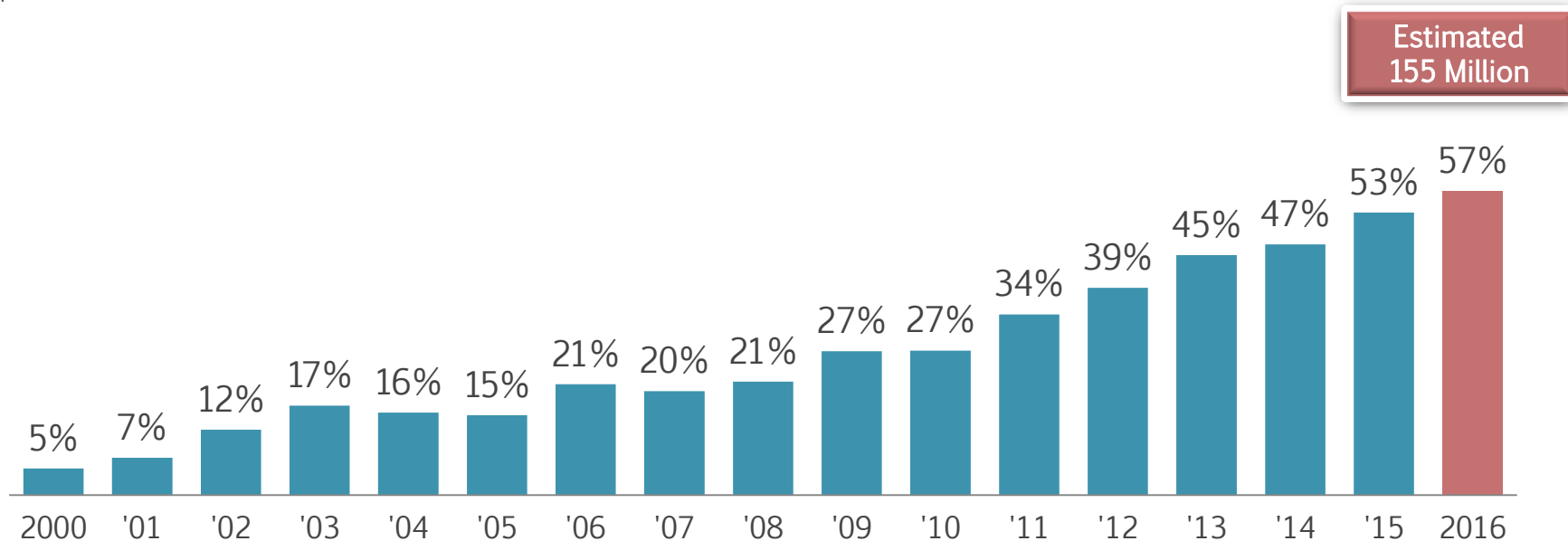




# ONLINE RADIO

# Monthly Online Radio Listening

Total Population 12+



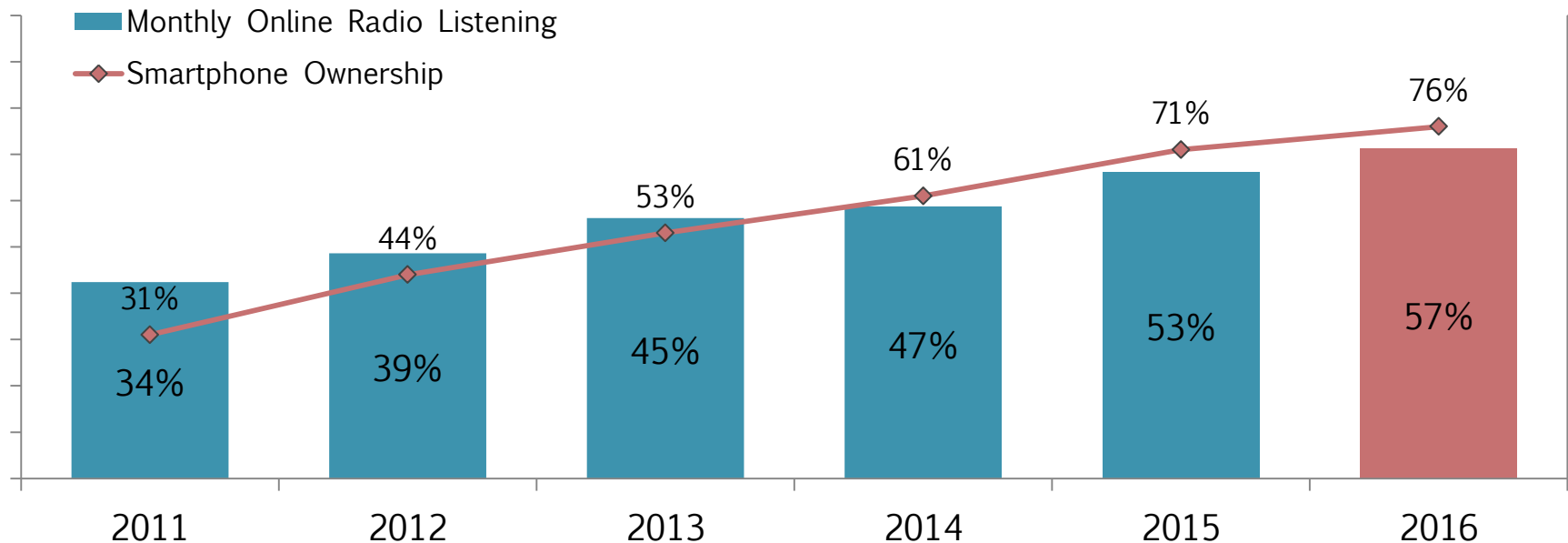
Estimated  
155 Million



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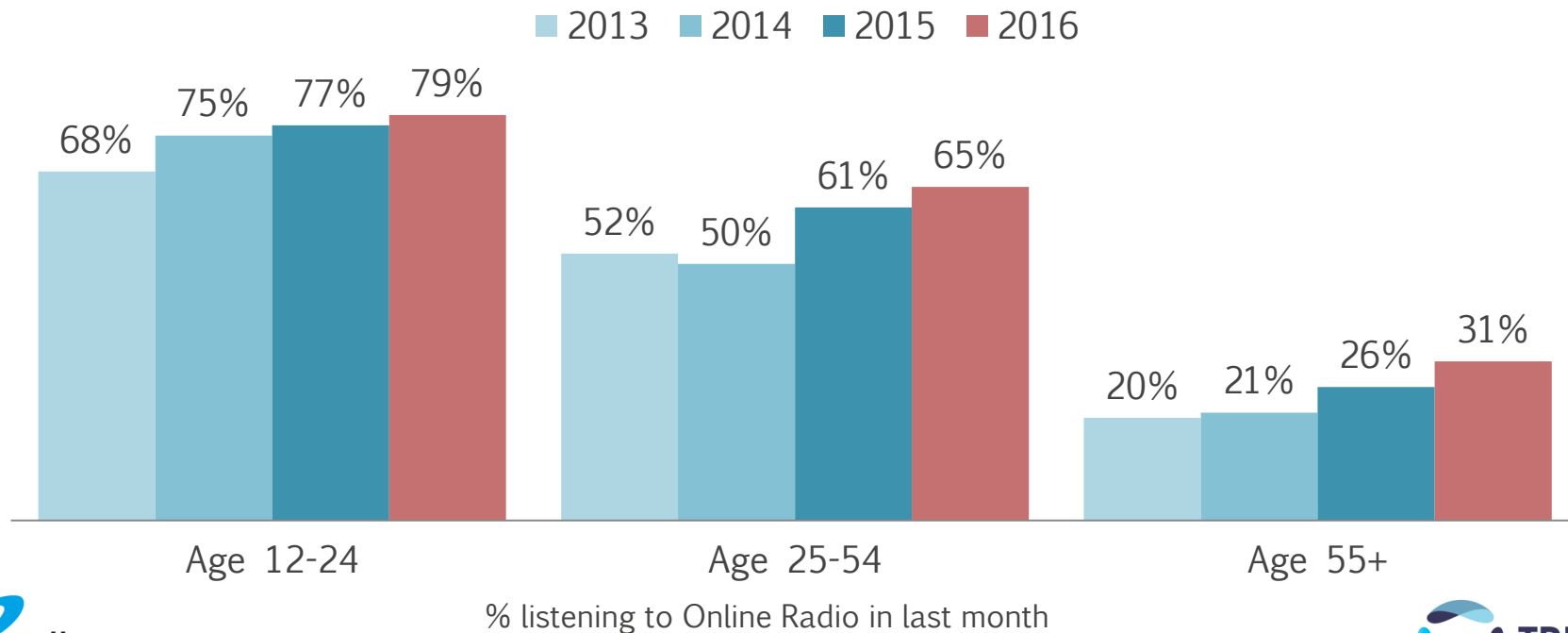
# Relationship Between Monthly Online Radio Listening and Smartphone Ownership

Total Population 12+





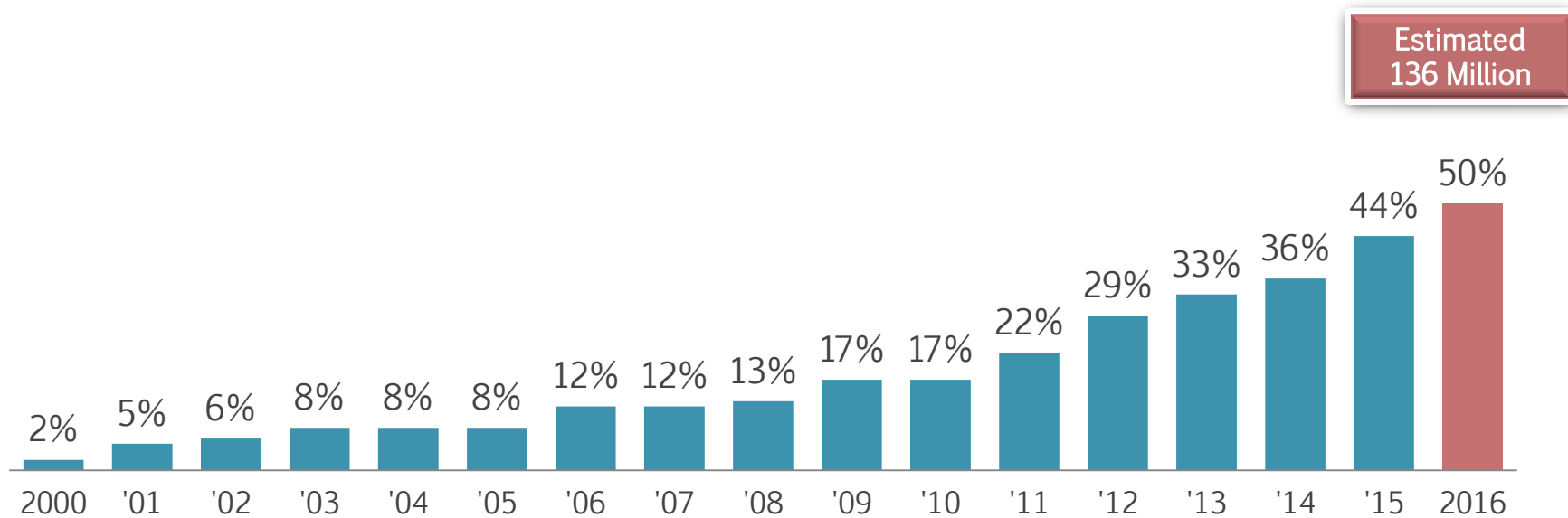
# Monthly Online Radio Listening



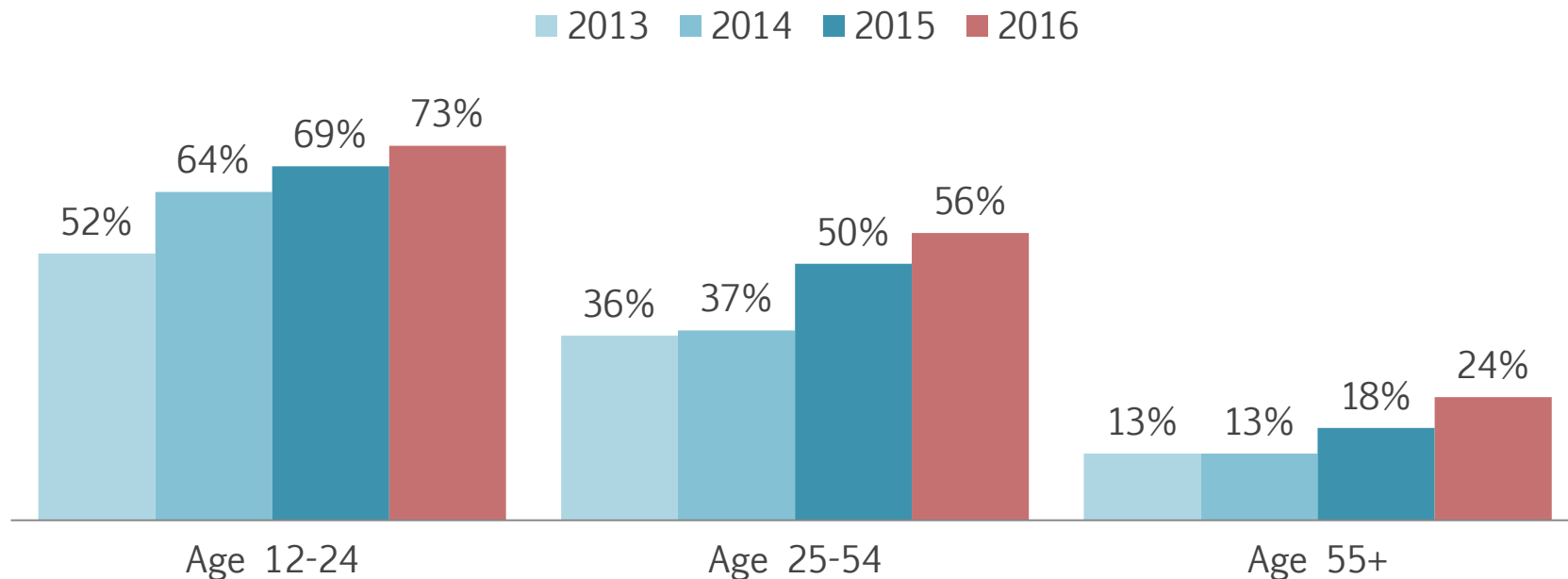
Online Radio = Listening to AM/FM radio stations online and/or listening to streamed audio content available only on the Internet

# Weekly Online Radio Listening

Total Population 12+



# Weekly Online Radio Listening



% listening to Online Radio in last week

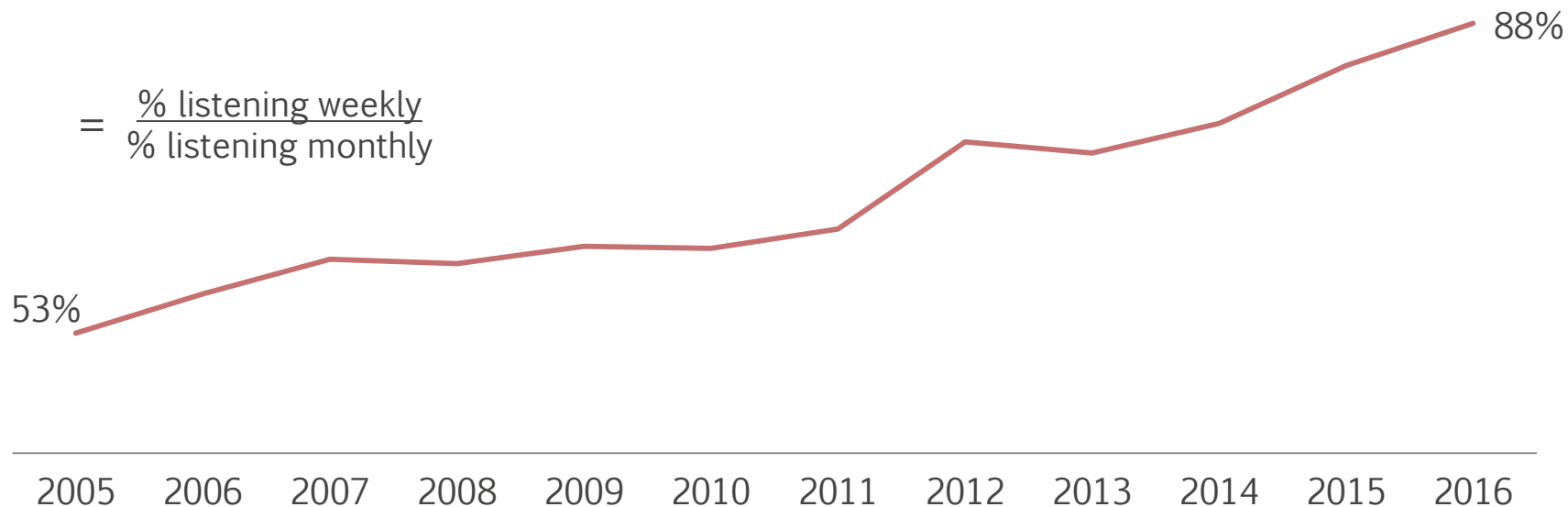
Online Radio = Listening to AM/FM radio stations online and/or listening to streamed audio content available only on the Internet



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# Portion of Online Radio Monthly Listeners Who Also Listen Weekly

Total Population 12+

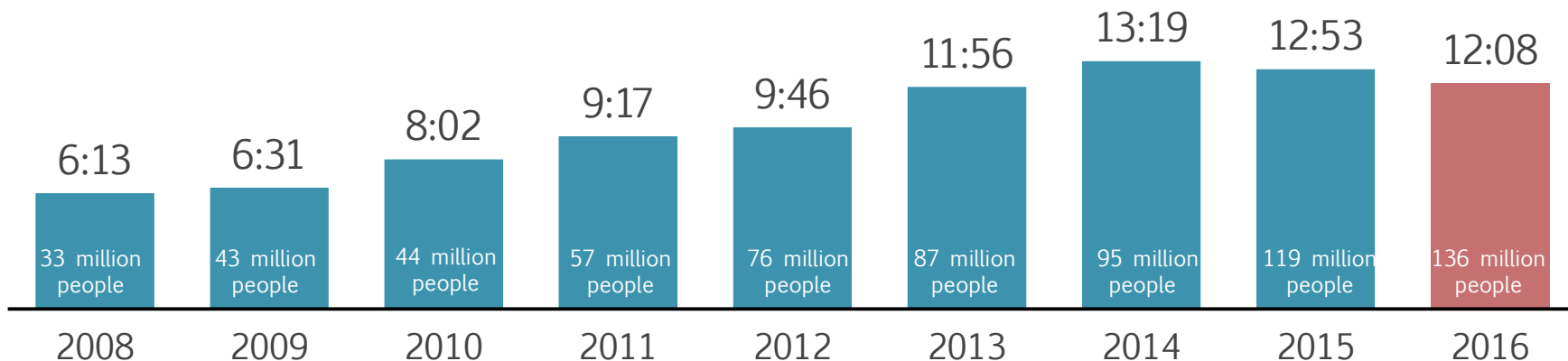


Online Radio = Listening to AM/FM radio stations online and/or listening to streamed audio content available only on the Internet



# Average Time “Weekly Online Radio Listeners” Spend Listening to Online Radio

Base: Weekly Online Radio Listeners



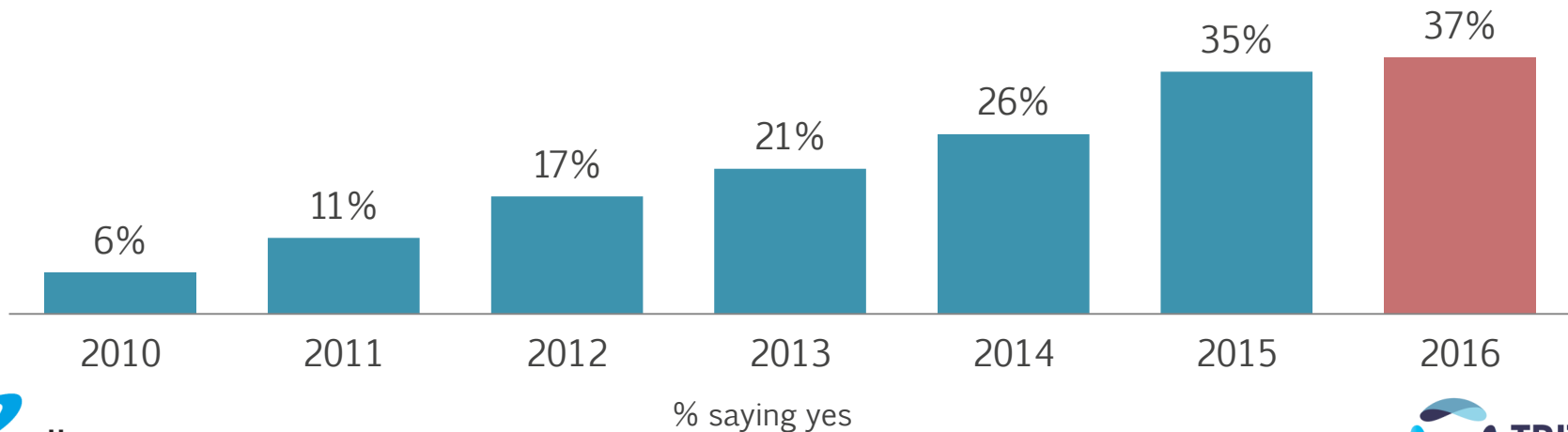


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# Online Radio Listening in Car

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

Base: Own a cell phone; 93%





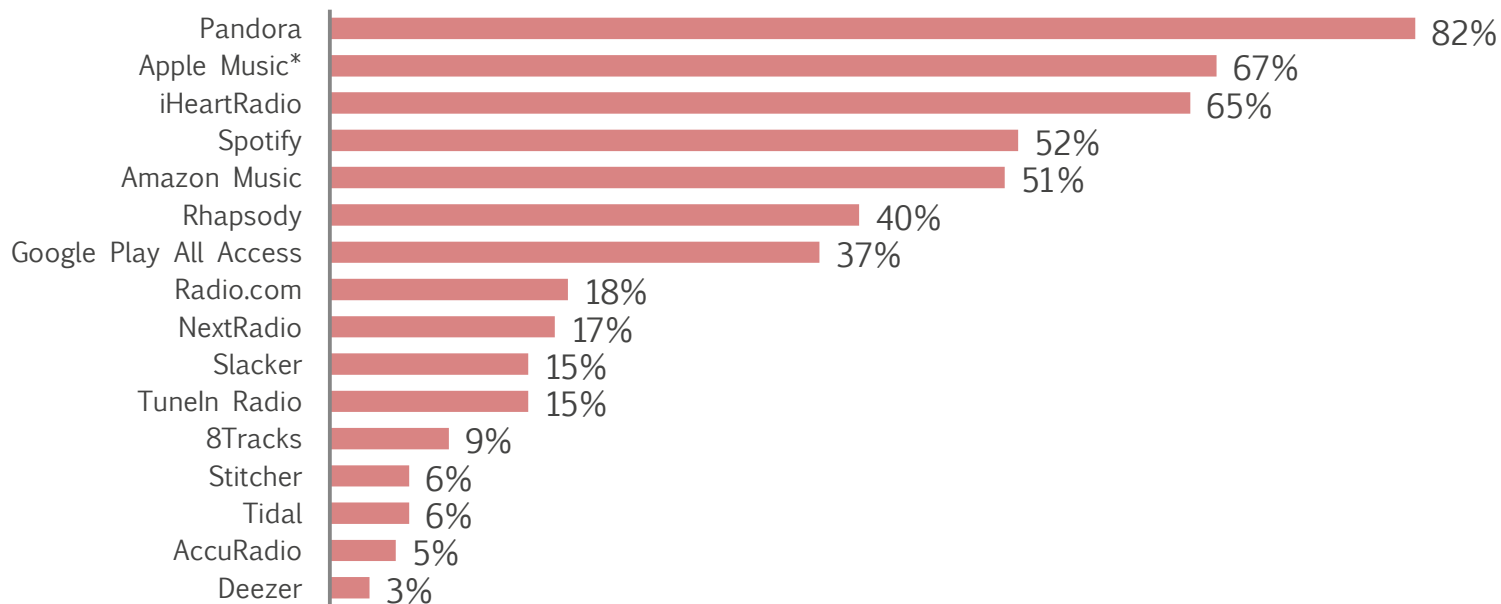
# AUDIO BRANDS



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# Audio Brand Awareness

Total Population 12+



\*Asked as "Apple Music, formerly known as iTunes Radio"

% aware of audio brand



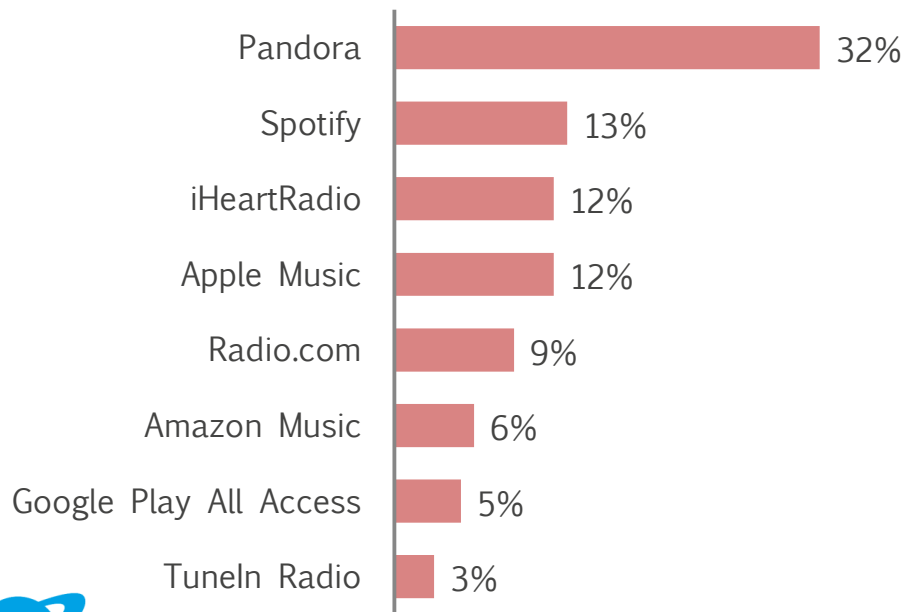




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# Listened in the last month to...

Total Population 12+



Brands lower than 3% Age 12+ not shown

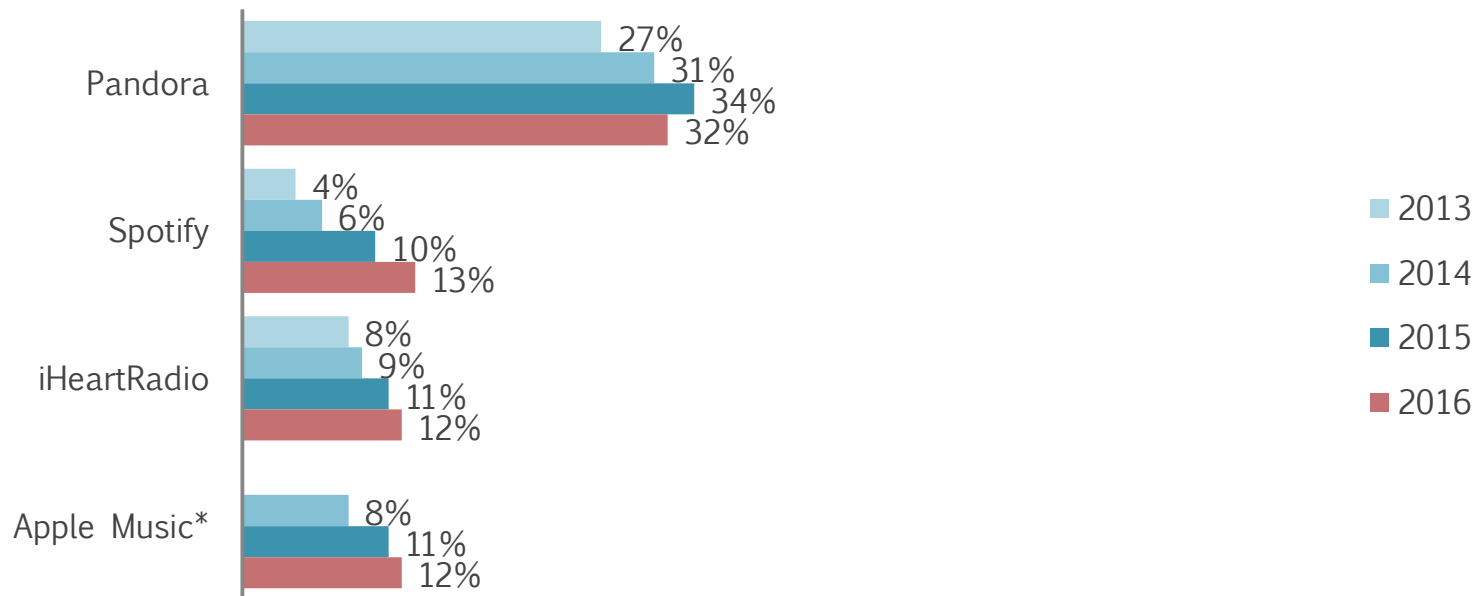


% listened in last month

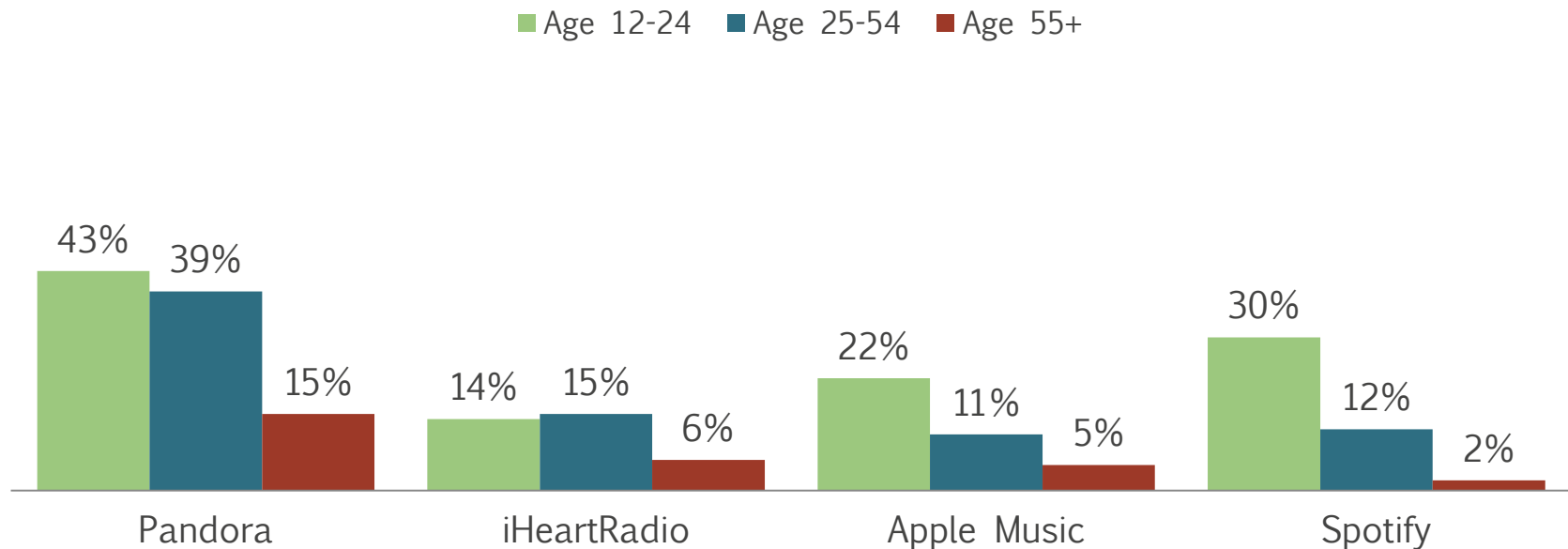


# Listened in the last month to...

Total Population 12+

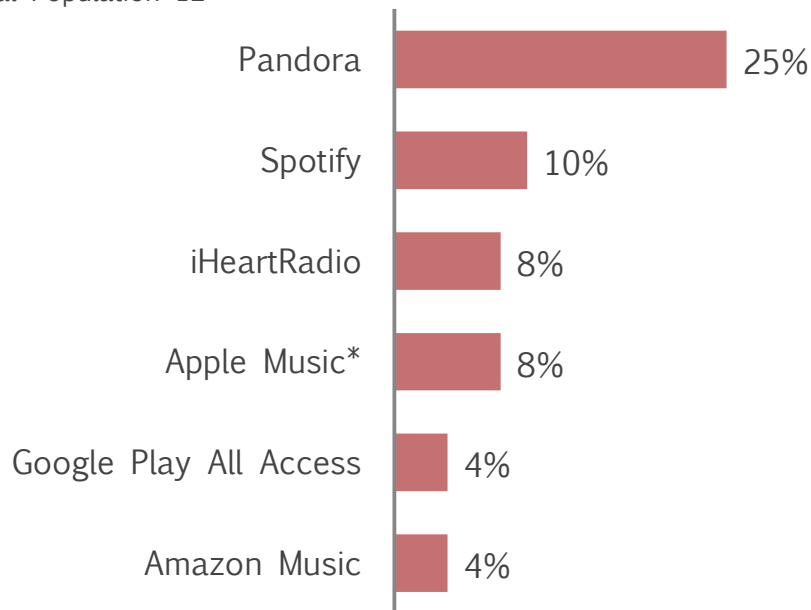


# Listened in the last month to...



# Listened in the last week to...

Total Population 12+



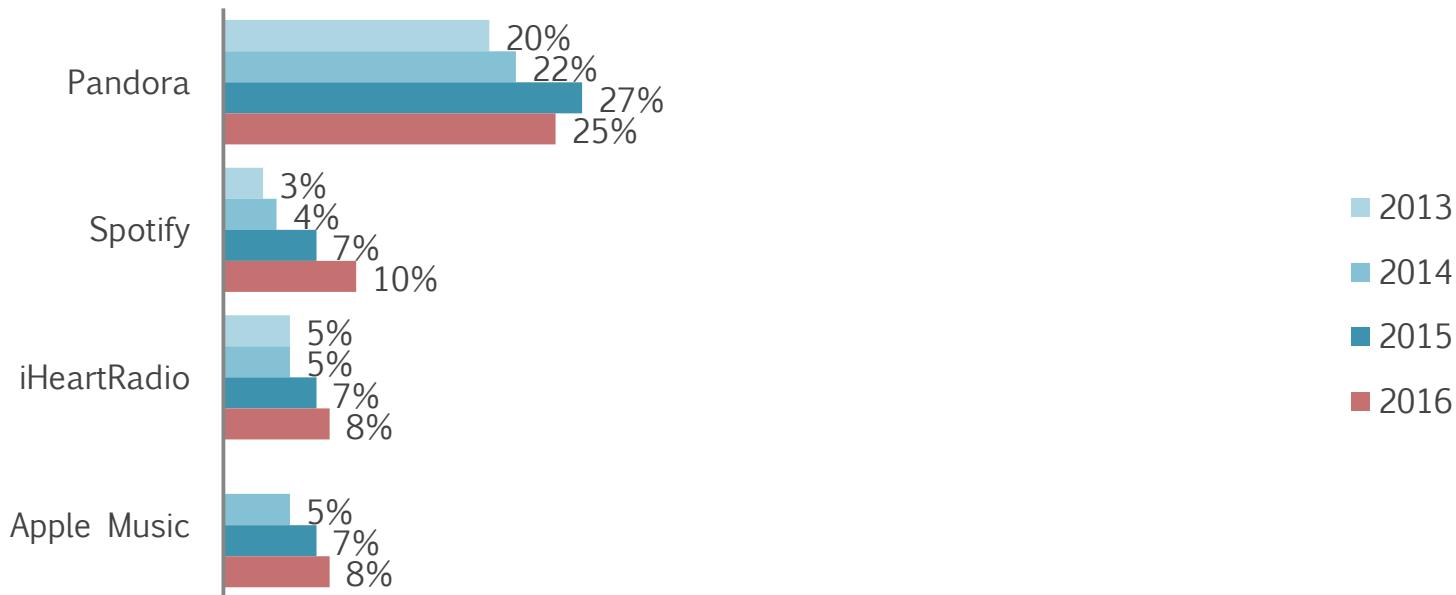
Brands lower than 4% Age 12+ not shown

\*Asked as "Apple Music, formerly known as iTunes Radio"

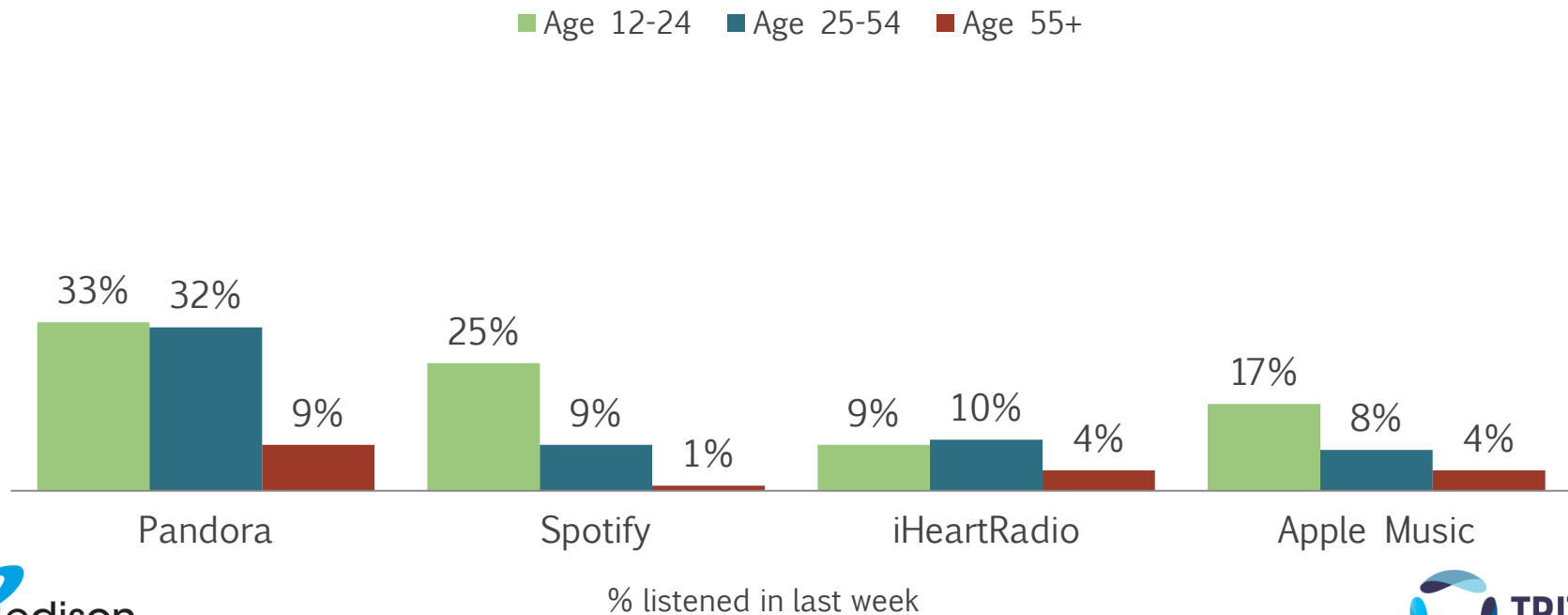
% listened in last week

# Listened in the last week to...

Total Population 12+

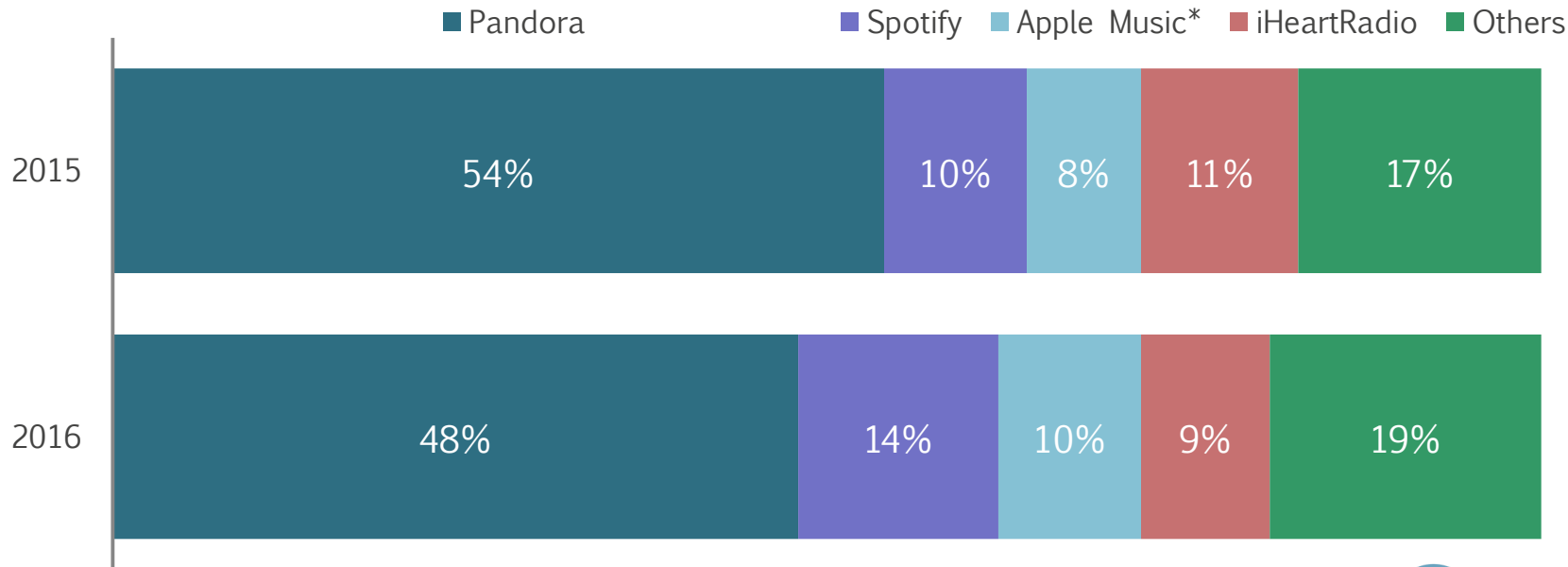


# Listened in the last week to...



# Audio Brand Used Most Often

Base: Currently ever use any audio brand

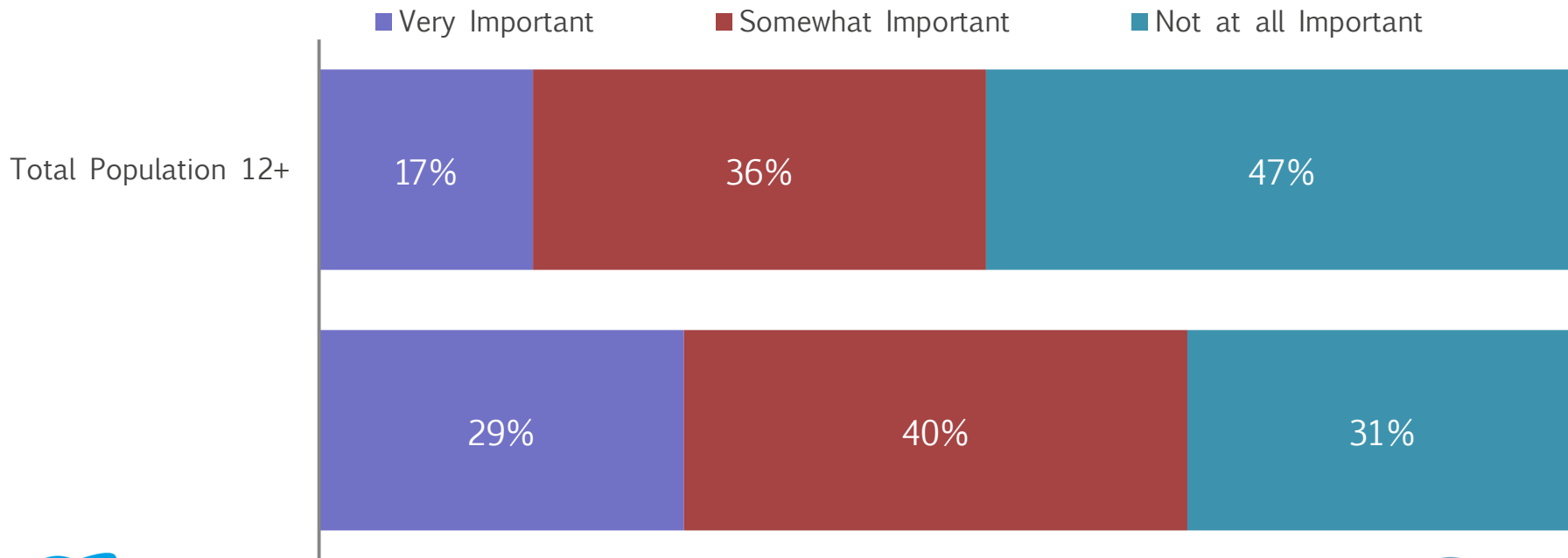




# MUSIC DISCOVERY



# Importance of Keeping Up-To-Date with Music

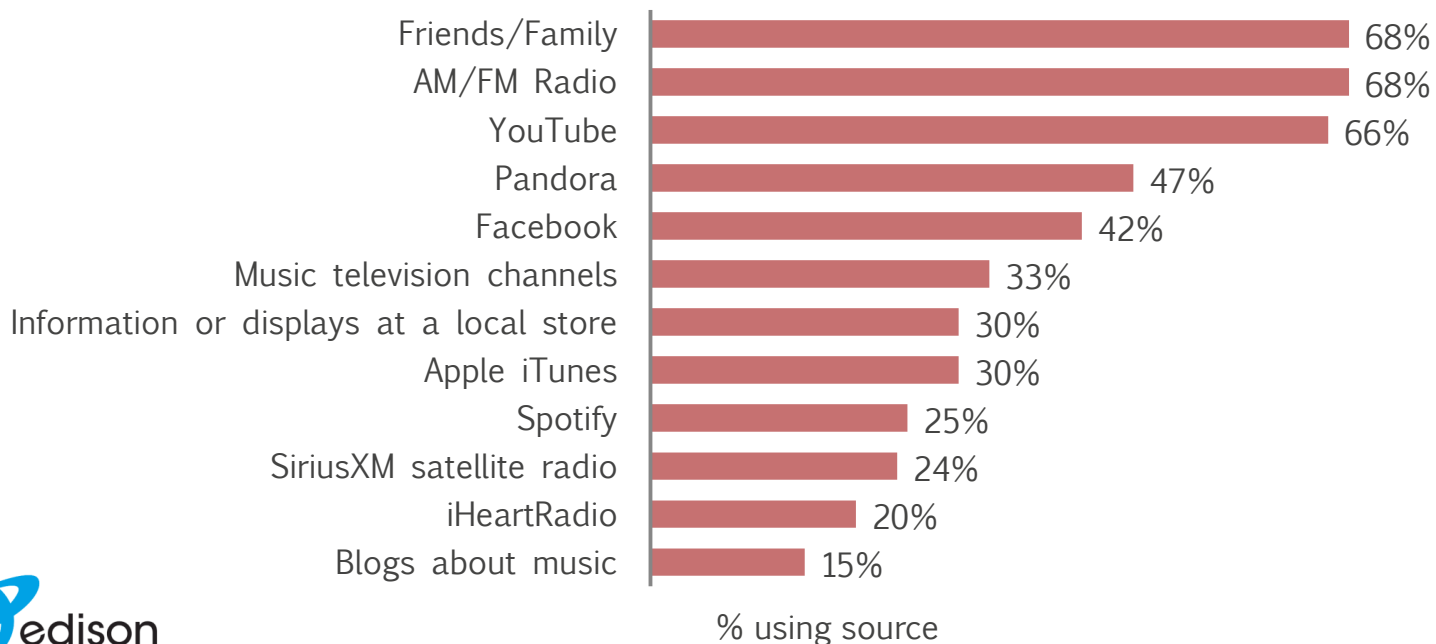




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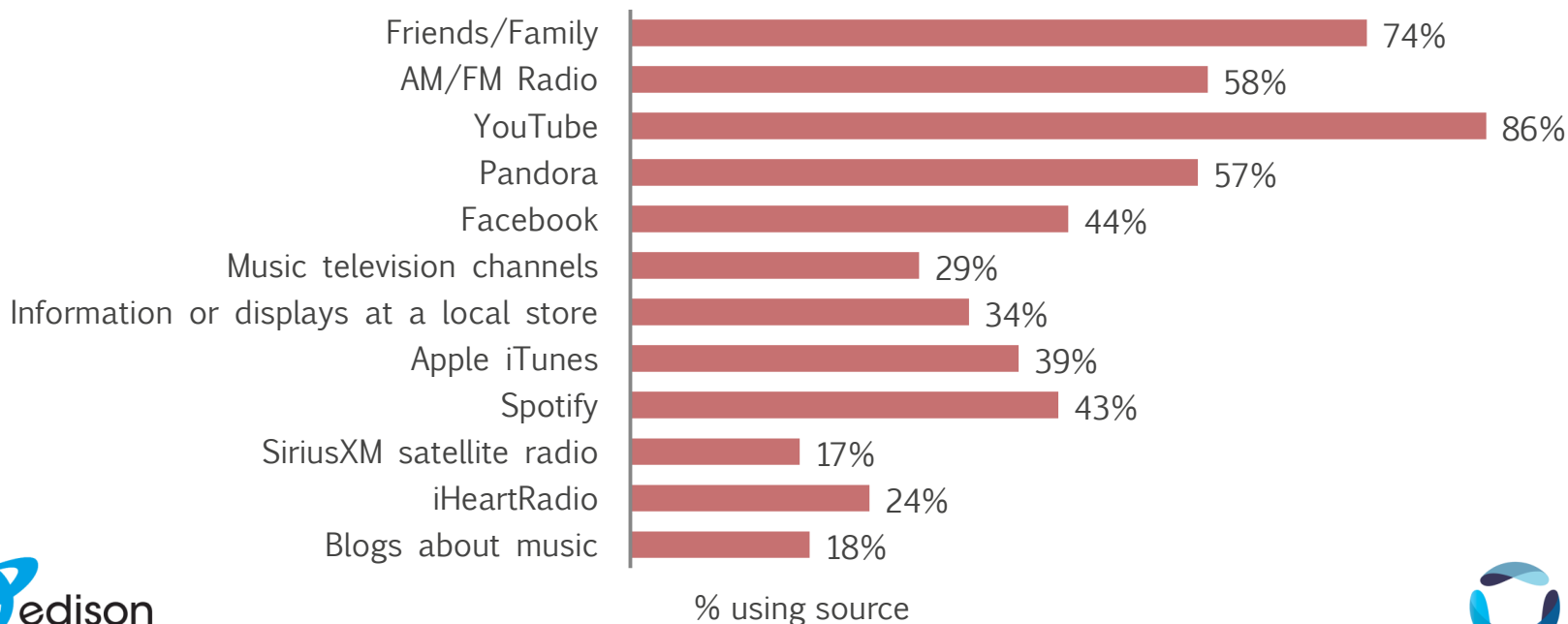
# Sources Used for Keeping Up-to-Date with Music

Base: Those saying it is “Very Important” or “Somewhat Important” to keep up-to-date with music



# Sources Used for Keeping Up-to-Date with Music (Age 12-24)

Base: Those saying it is “Very Important” or “Somewhat Important” to keep up-to-date with music

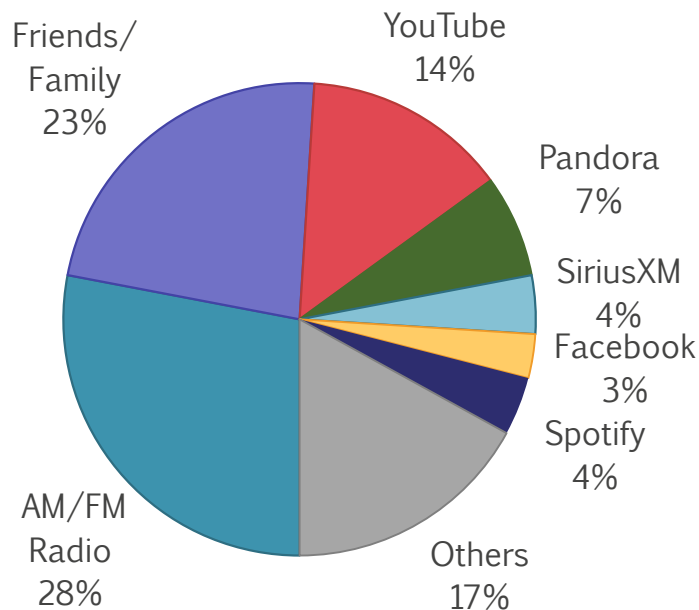




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# Source Used Most Often for Keeping Up-to-Date with Music

Base: Those saying it is “Very Important” or “Somewhat Important” to keep up-to-date with music

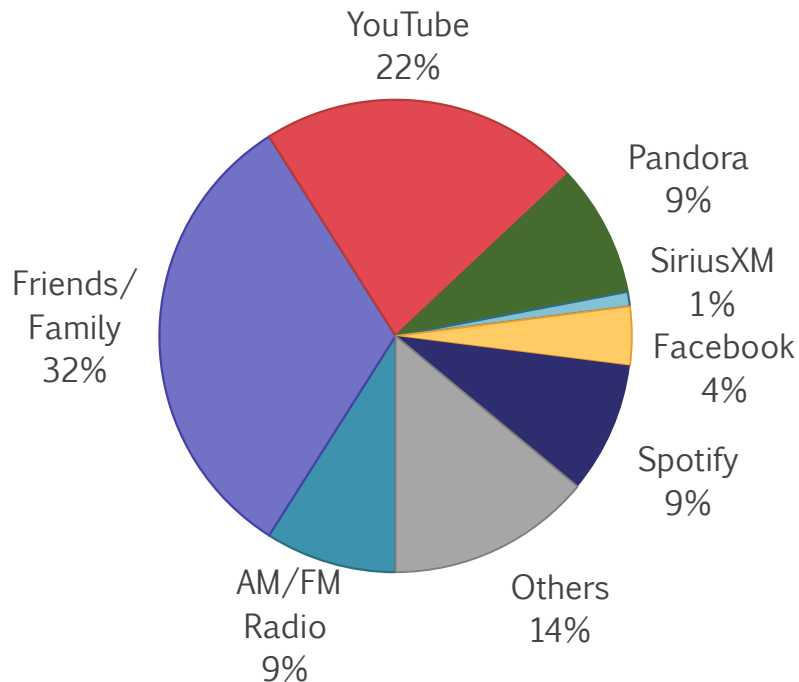




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# Source Used Most Often for Keeping Up-to-Date with Music (Age 12-24)

Base: Those saying it is “Very Important” or “Somewhat Important” to keep up-to-date with music

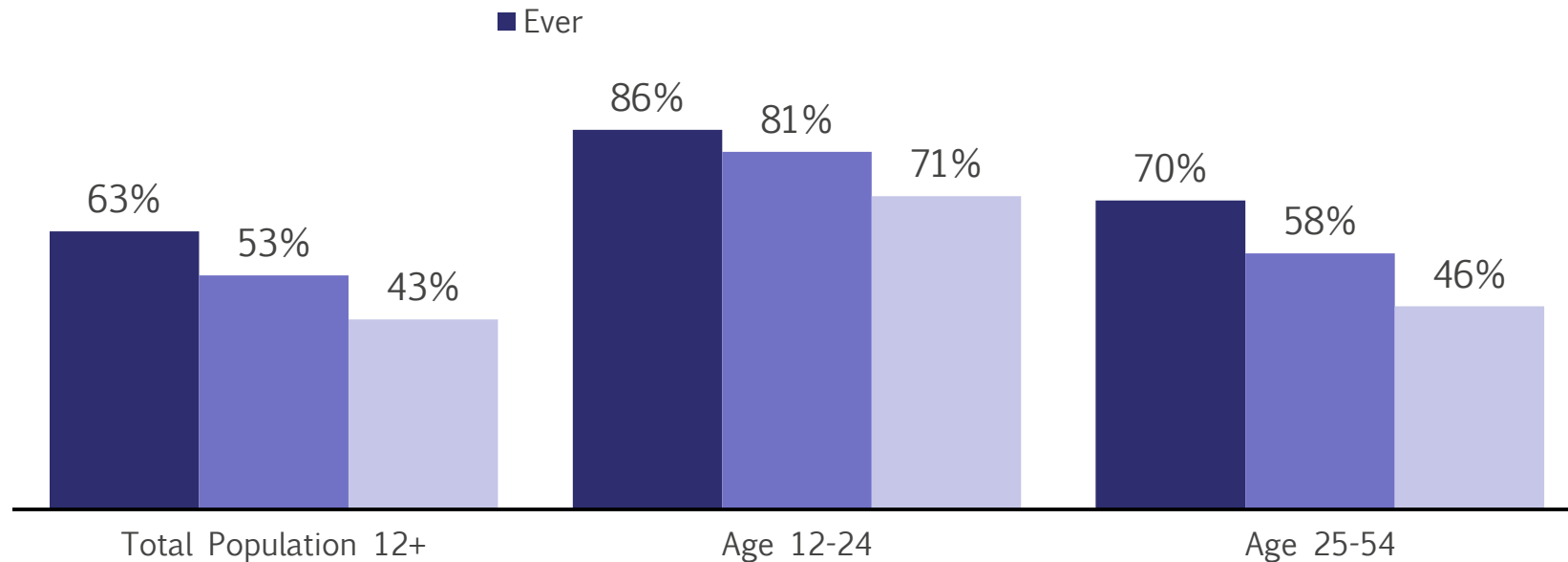




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# YouTube Usage

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

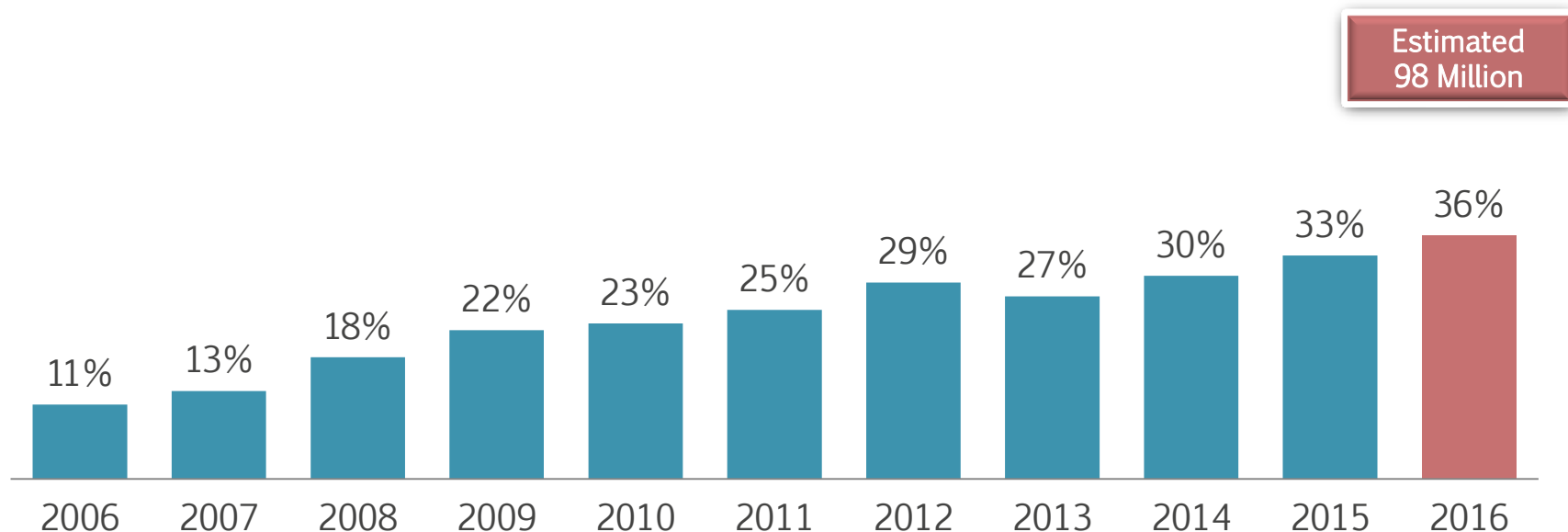




# PODCASTING

# Podcast Listening

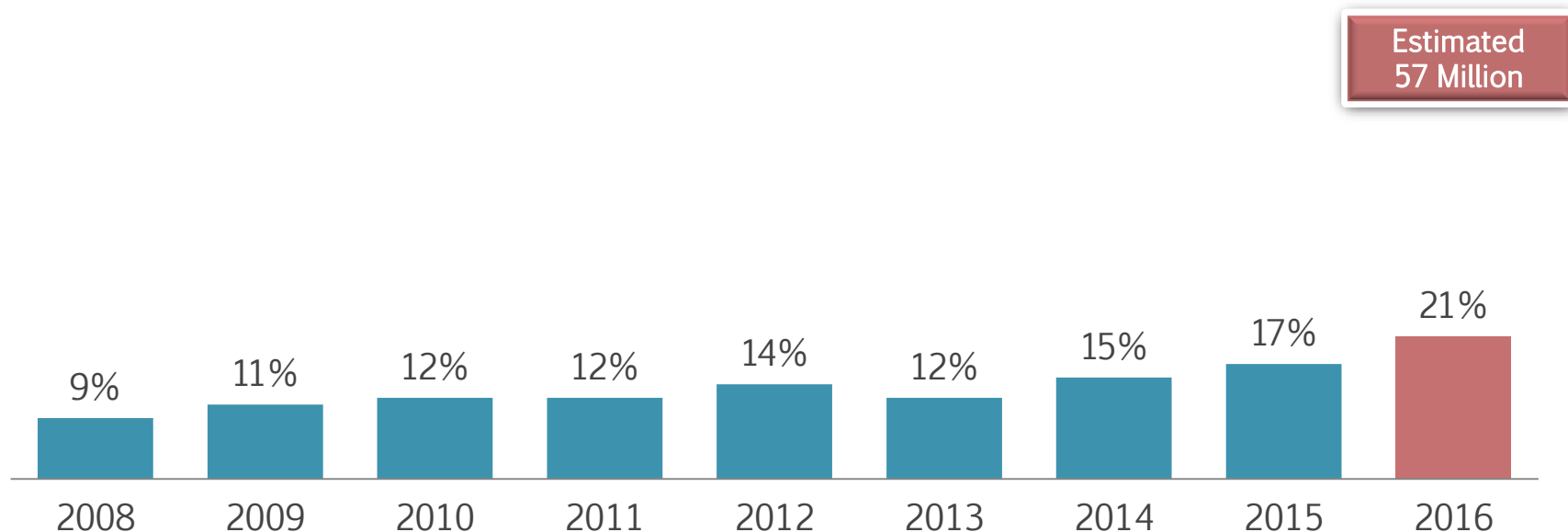
Total Population 12+



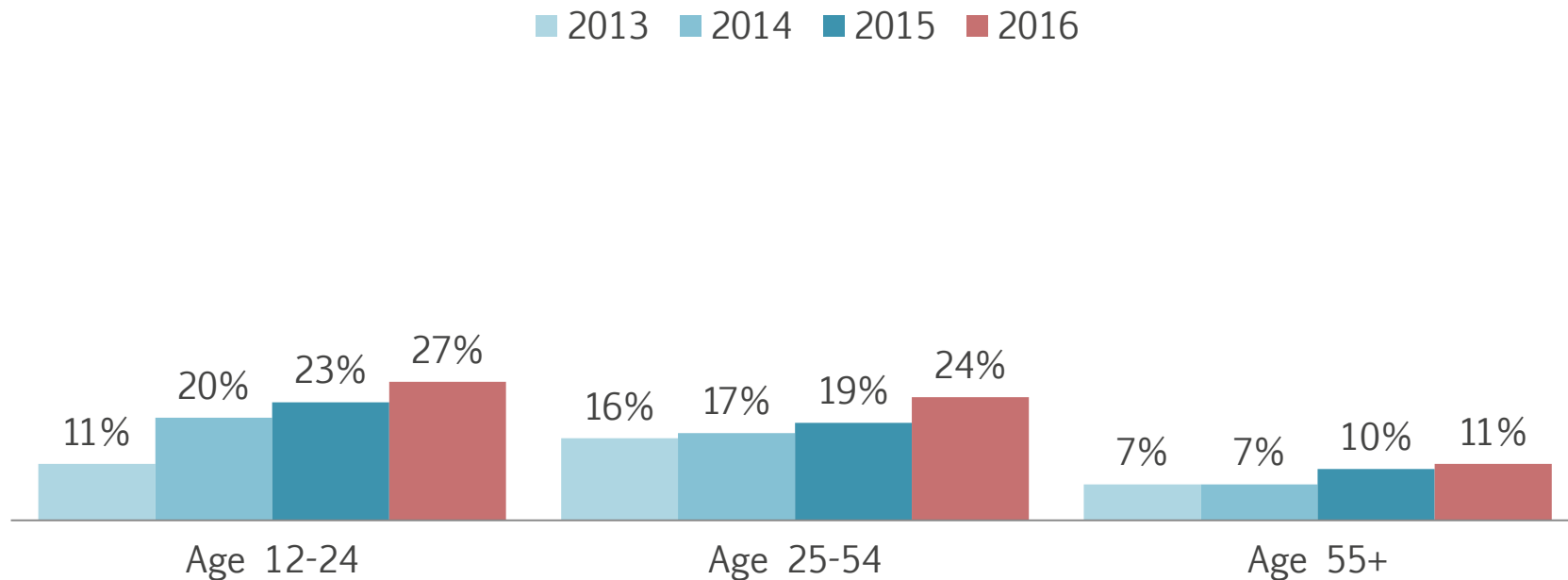


# Monthly Podcast Listening

Total Population 12+

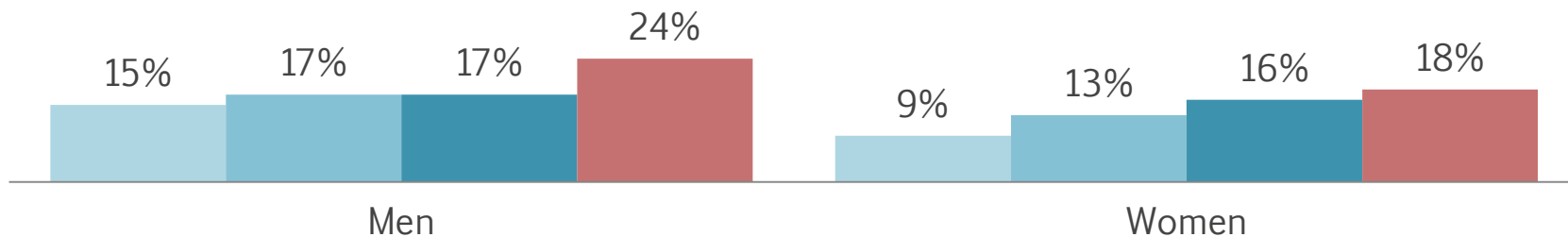


# Monthly Podcast Listening



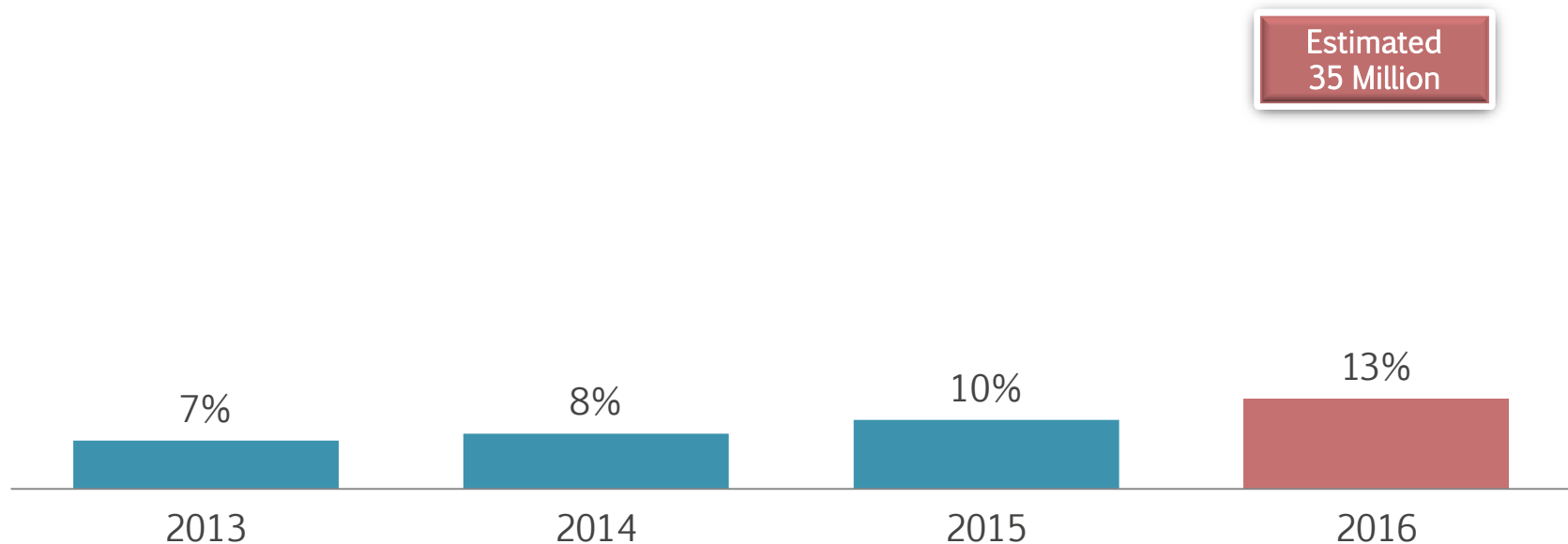
# Monthly Podcast Listening

■ 2013 ■ 2014 ■ 2015 ■ 2016



# Weekly Podcast Listening

Total Population 12+

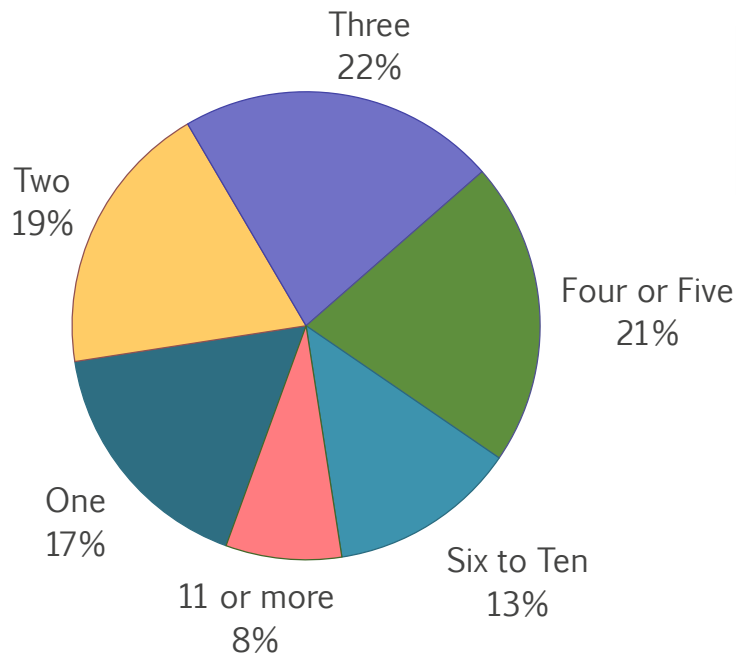




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# Number of Podcasts Listened to in Last Week

Base: Weekly Podcast Listeners



Average of five  
podcasts listened  
per week

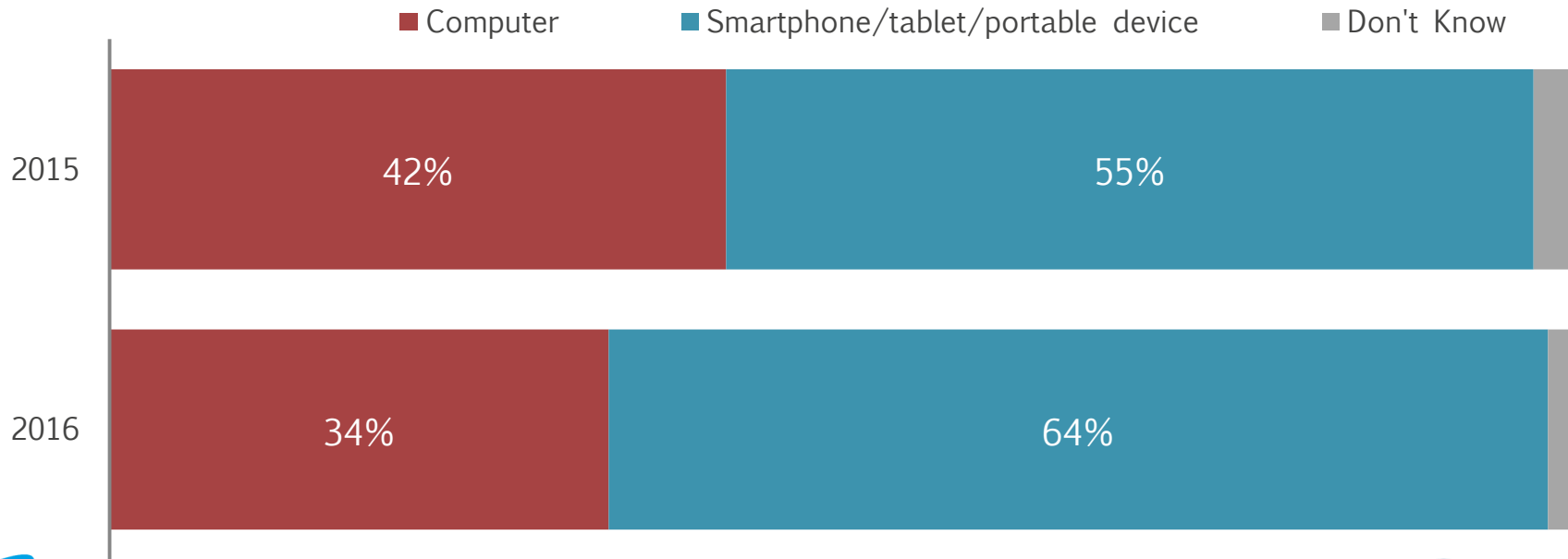




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# Device Used Most Often to Listen to Podcasts

Base: Ever Listened to a Podcast

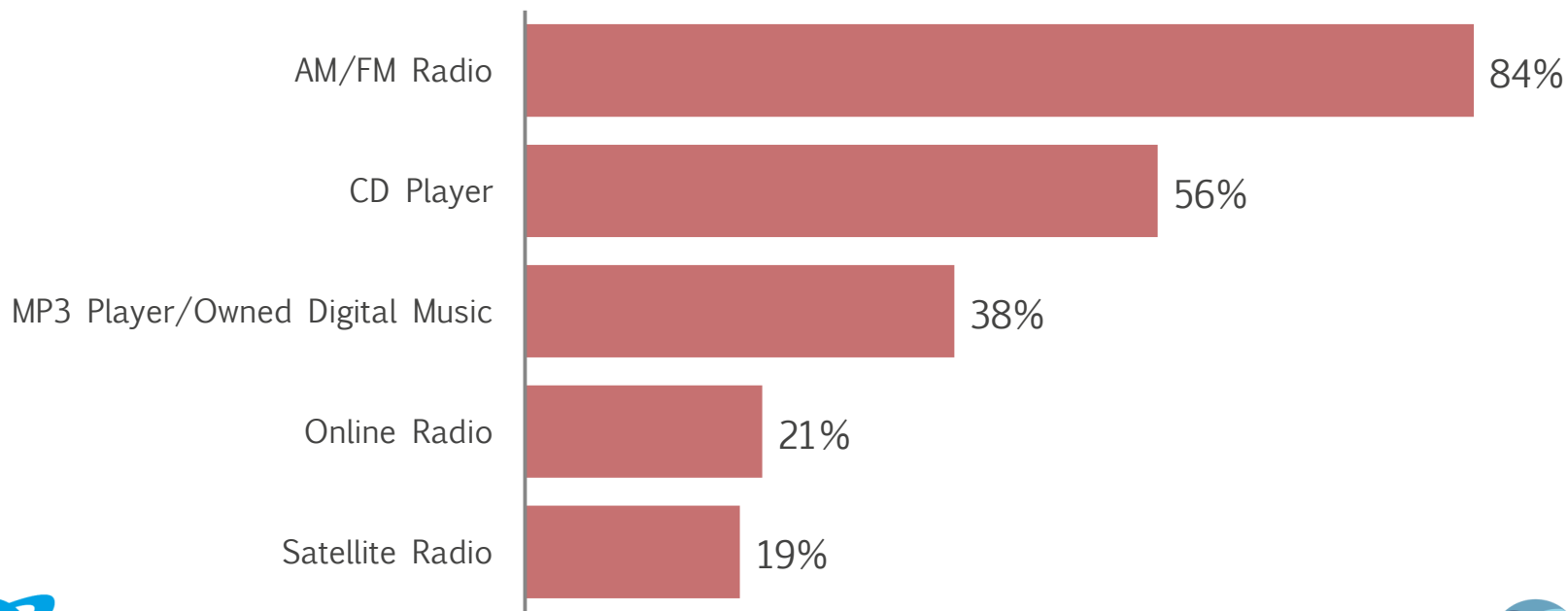




# IN-CAR MEDIA

# Audio Sources Used in Primary Car

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

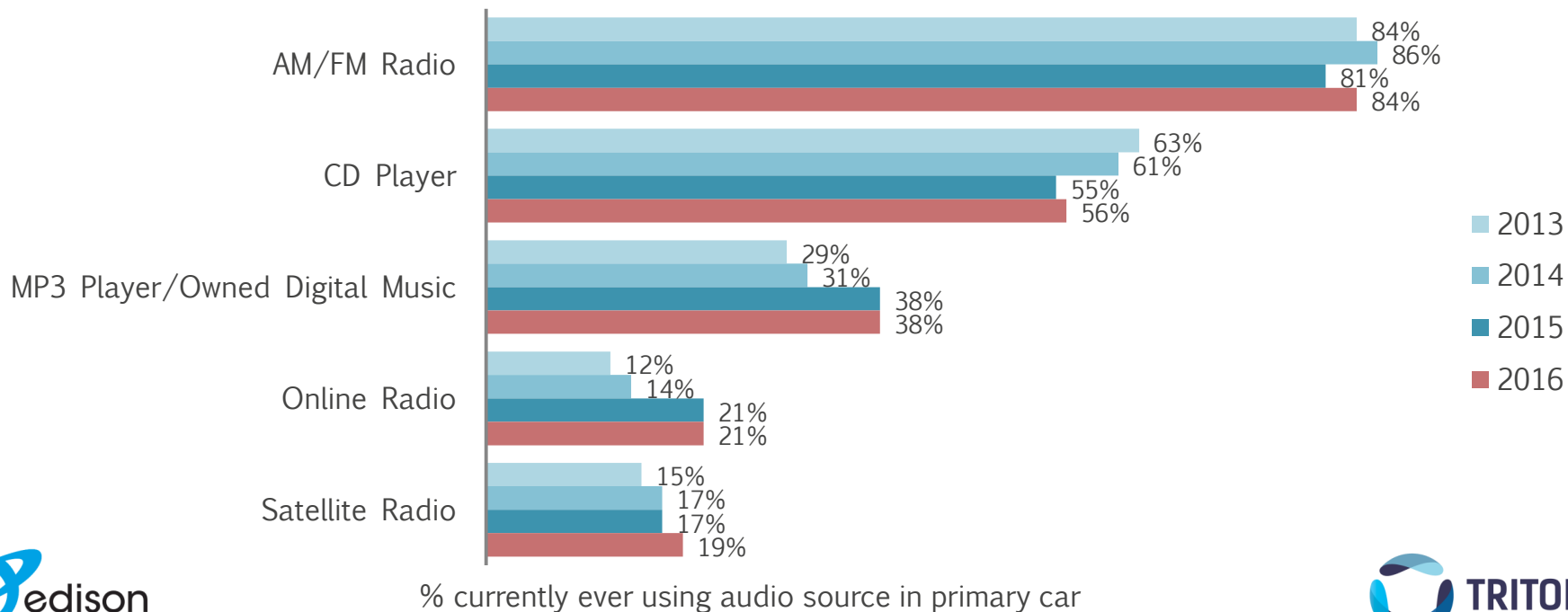


% currently ever using audio source in primary car



# Audio Sources Used in Primary Car

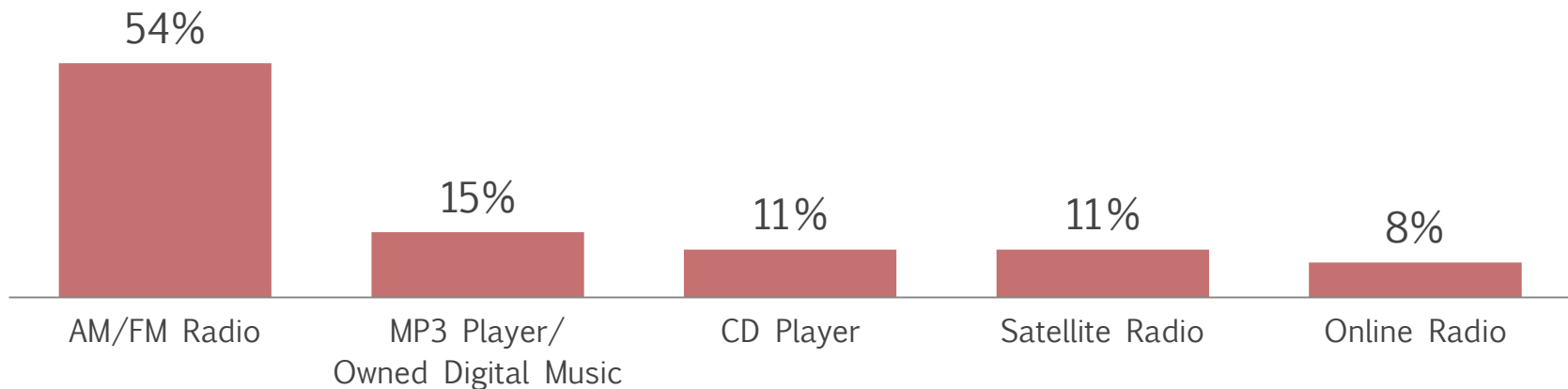
Base: Age 18+ and has driven/ridden in car in last month



# Audio Sources Used at Least 'Most of the Times' in Primary Car

*"In your primary car, how often do you use...?"*

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

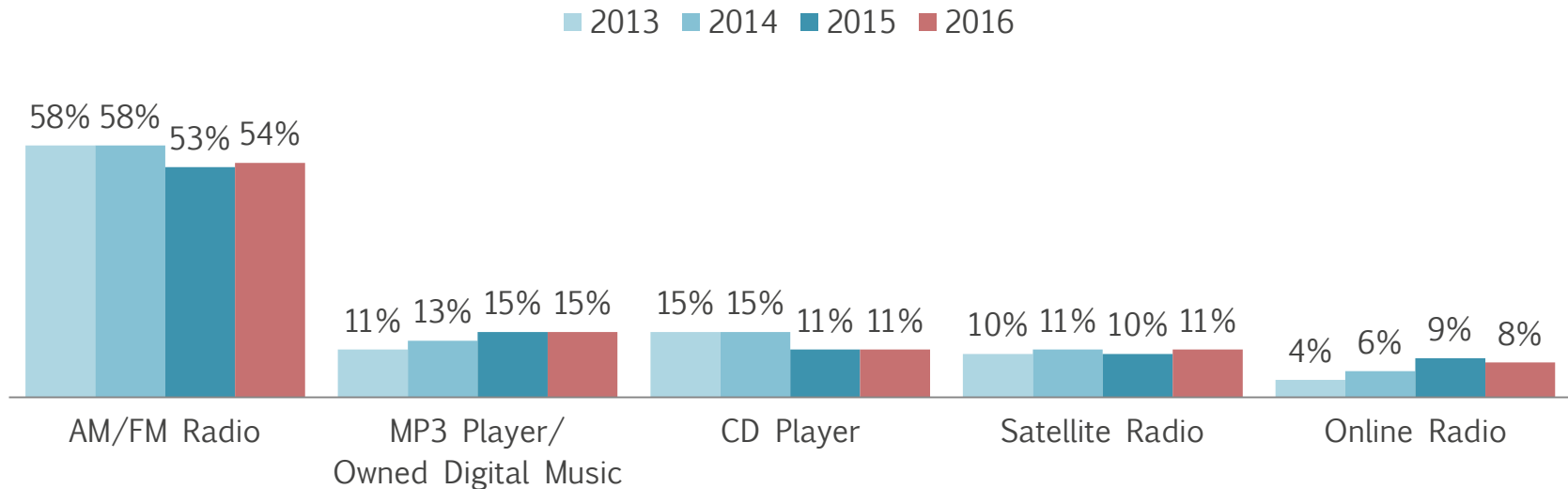


% using audio source "most" or "all" of the times in primary car

# Audio Sources Used at Least 'Most of the Times' in Primary Car

*"In your primary car, how often do you use...?"*

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



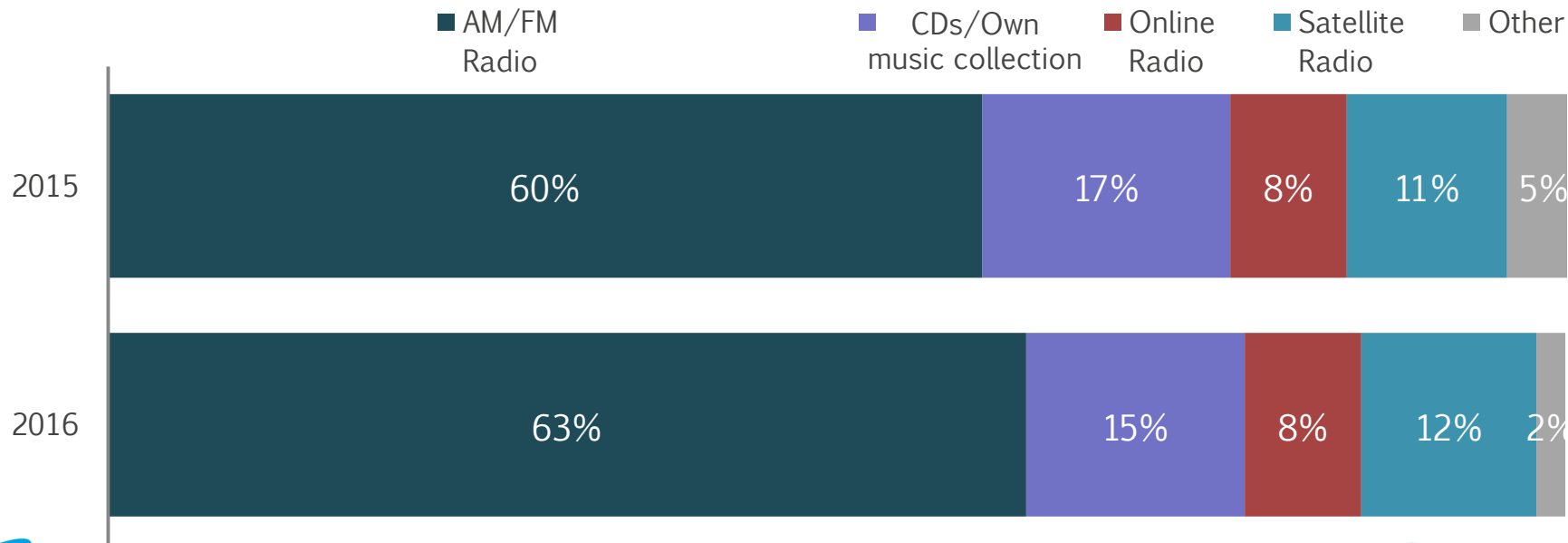
% using audio source "most" or "all" of the times in primary car



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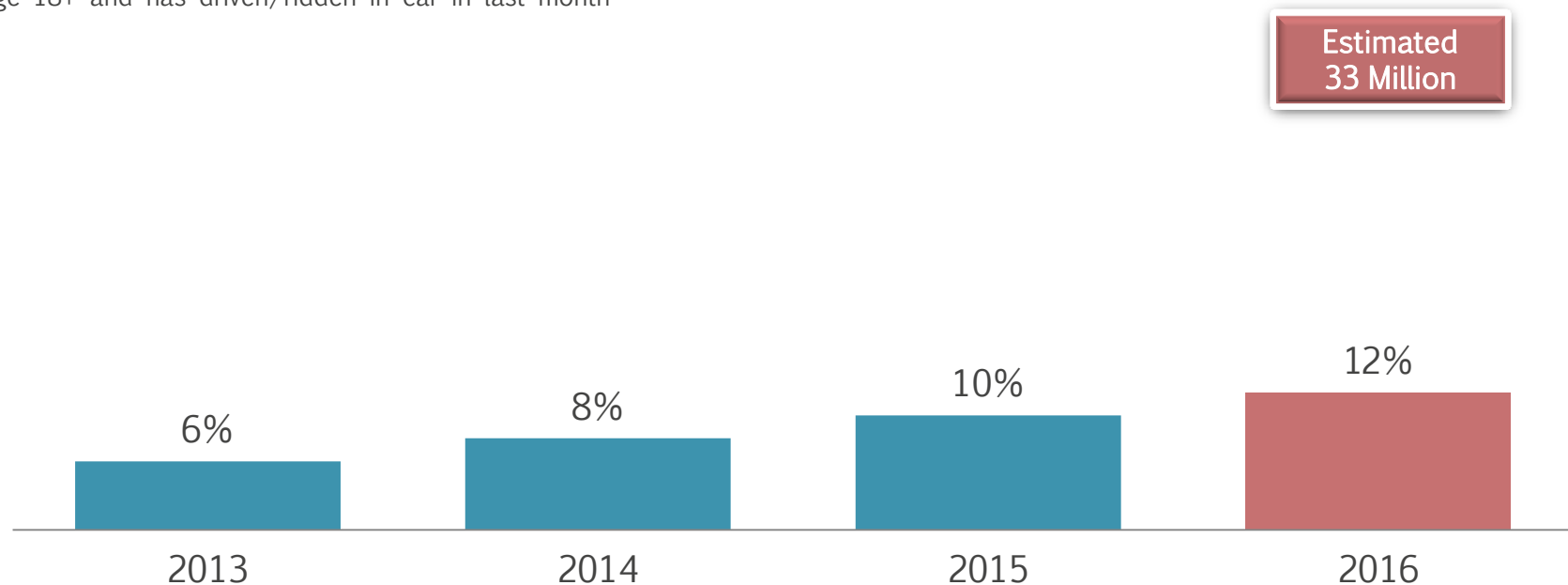
# Audio Source Used Most Often in Primary Car

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



# In-Dash Information and Entertainment Systems

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



% have an in-dash system in primary car



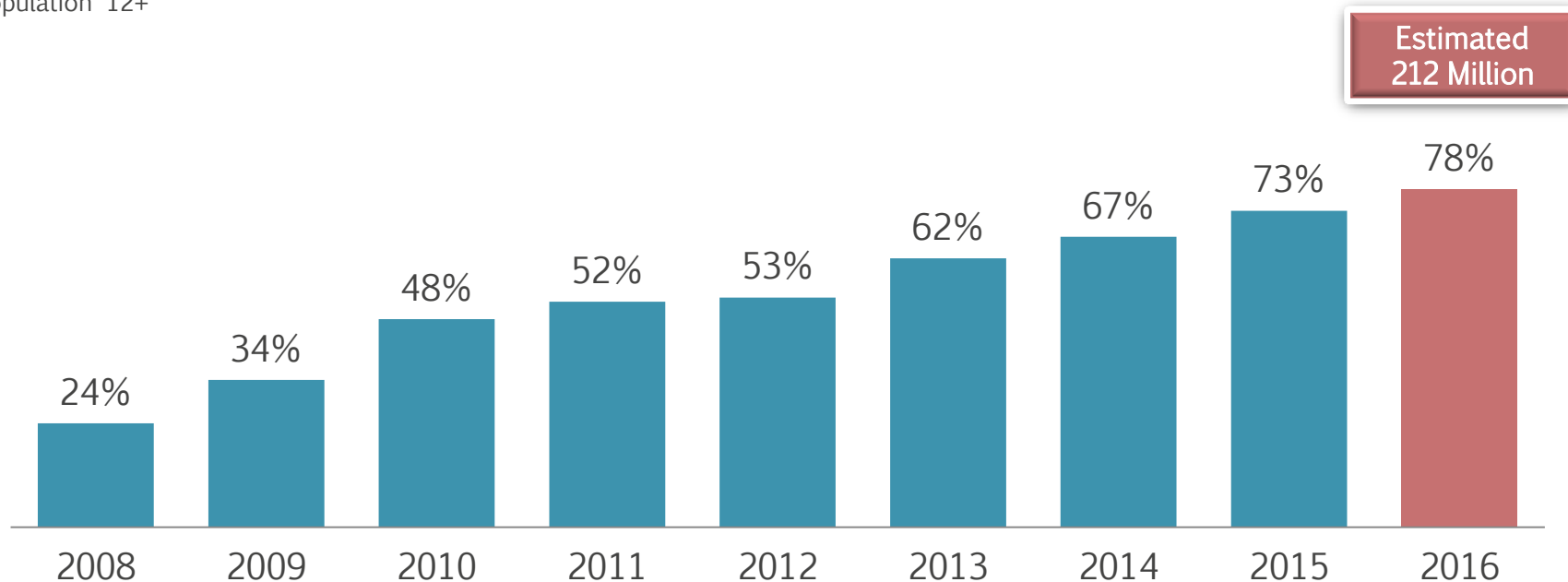
# SOCIAL MEDIA



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# Social Media Usage

Total Population 12+



% currently use any social media

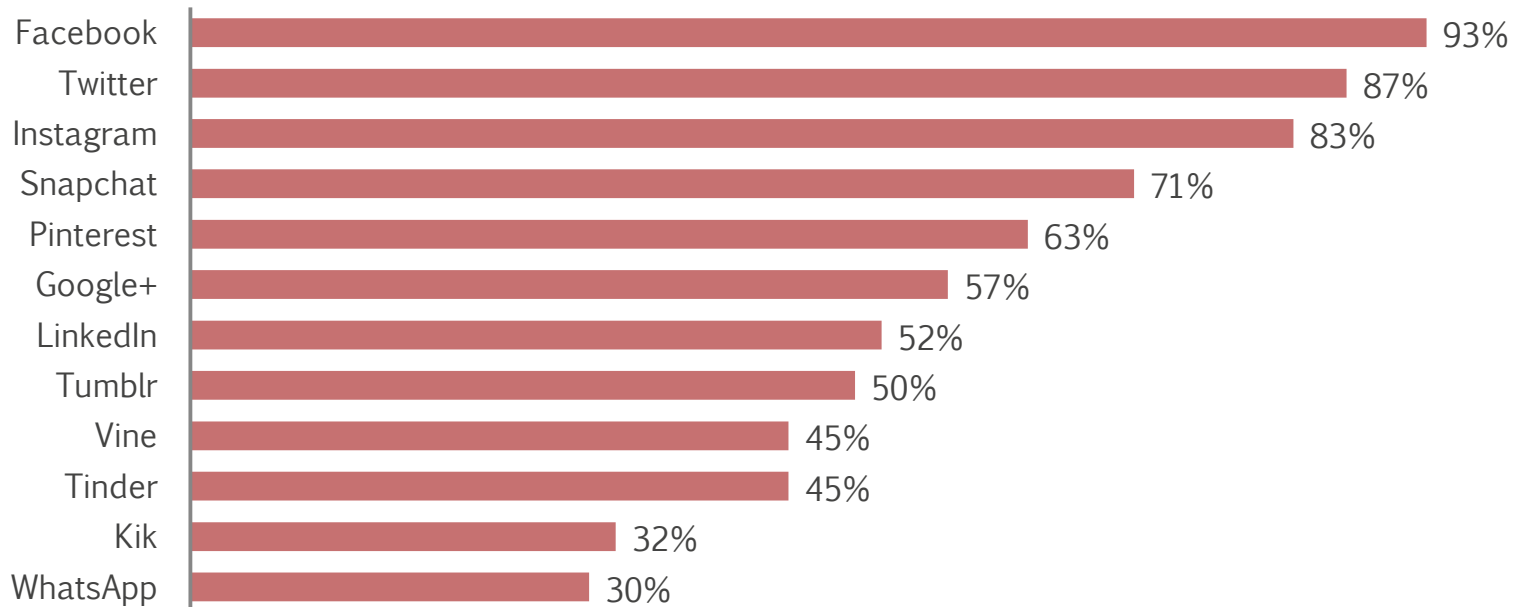




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# Social Media Brand Awareness

Total Population 12+



% aware of social media brand





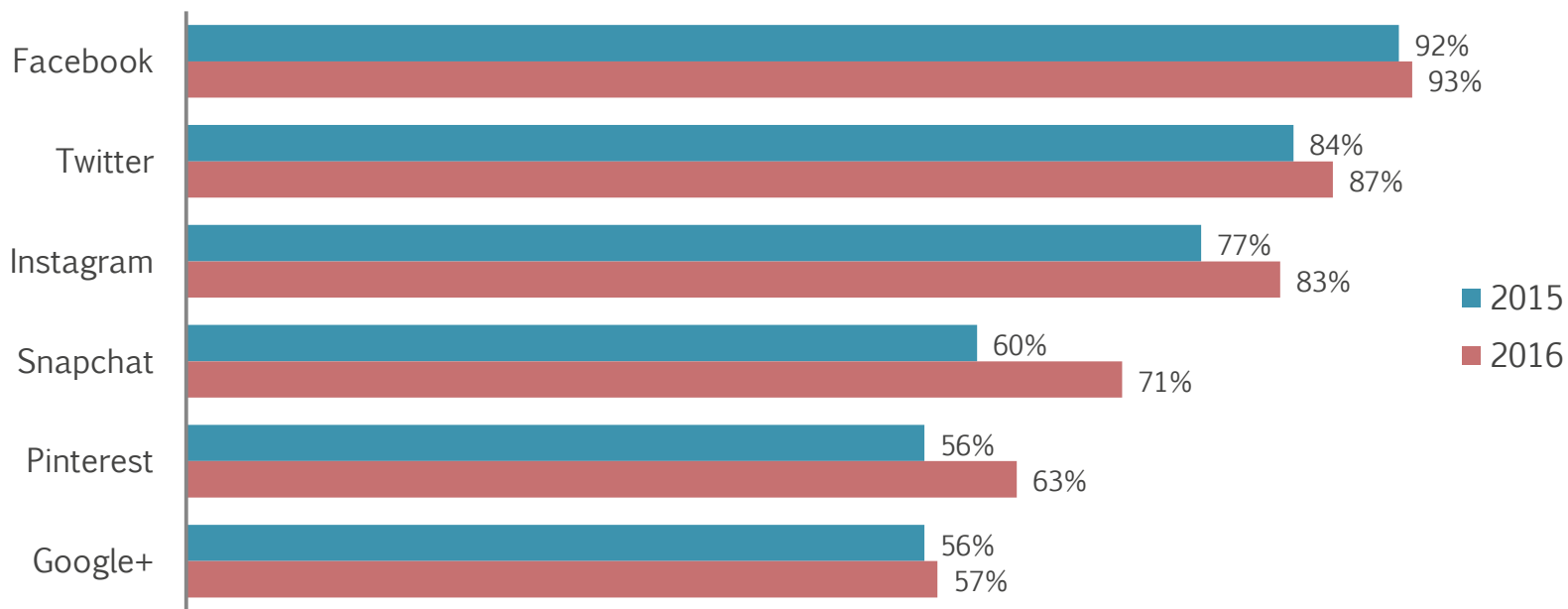


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# Social Media Brand Awareness

Total Population 12+

Page 1 of 2



% aware of social media brand



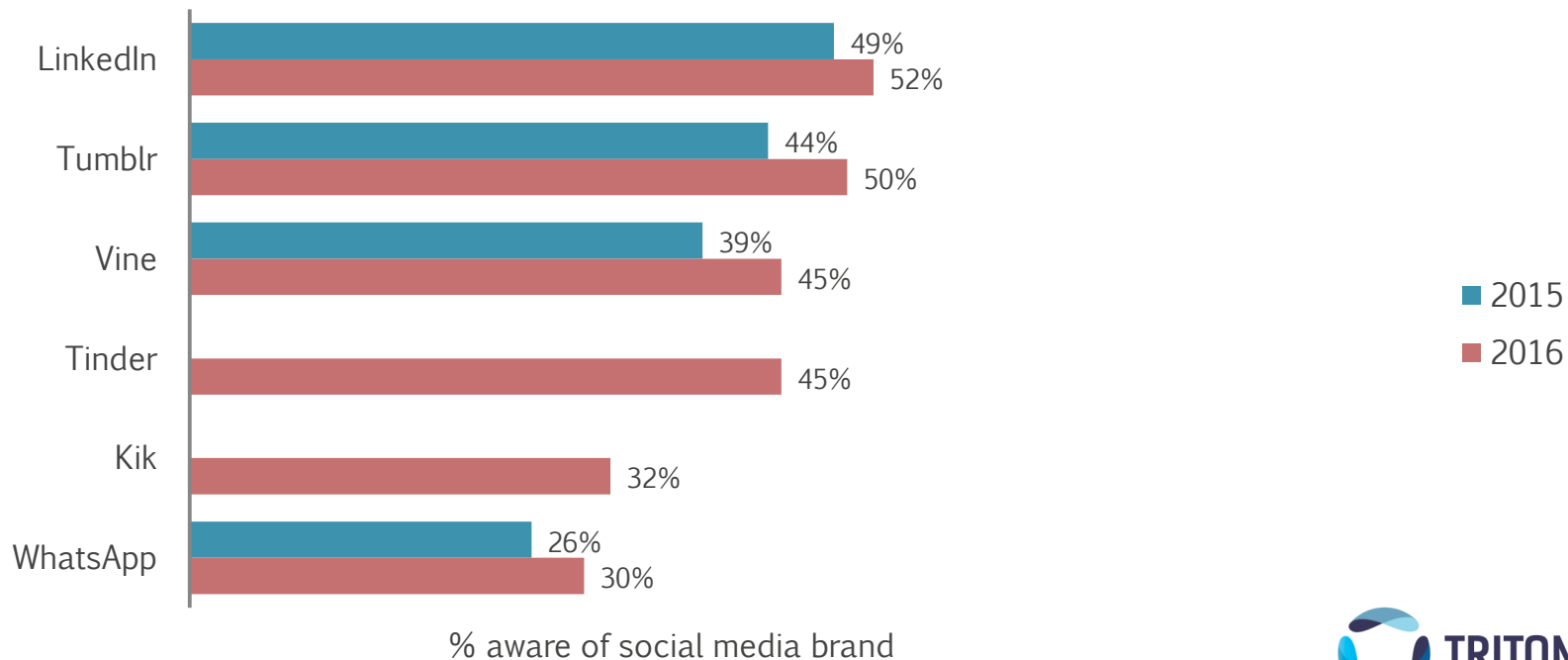


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# Social Media Brand Awareness

Total Population 12+

Page 2 of 2

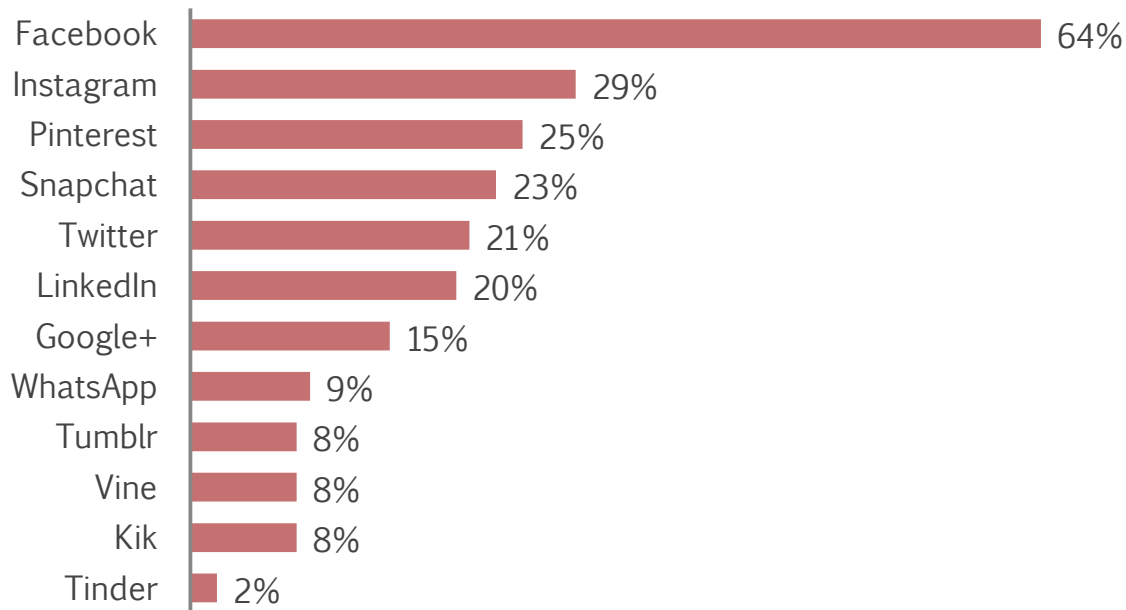




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# Social Media Brand Usage

Total Population 12+



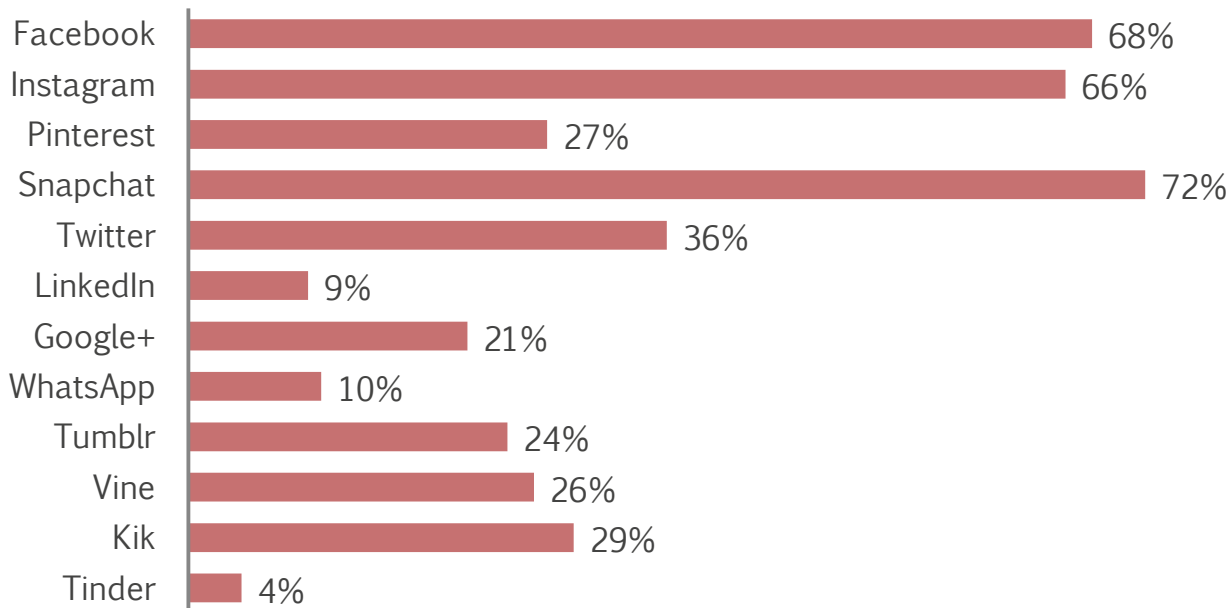
% currently ever use social media brand





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# Social Media Brand Usage (Age 12-24)



% currently ever use social media brand

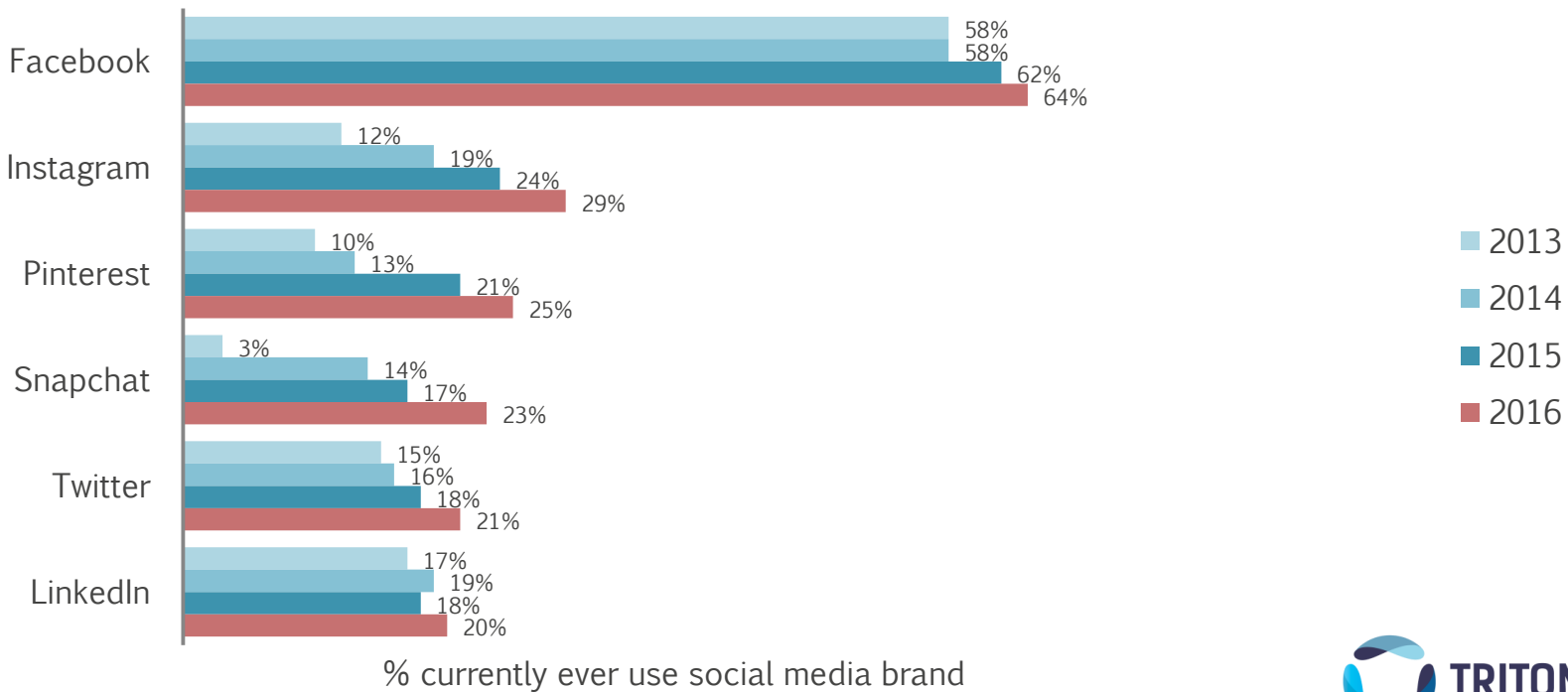




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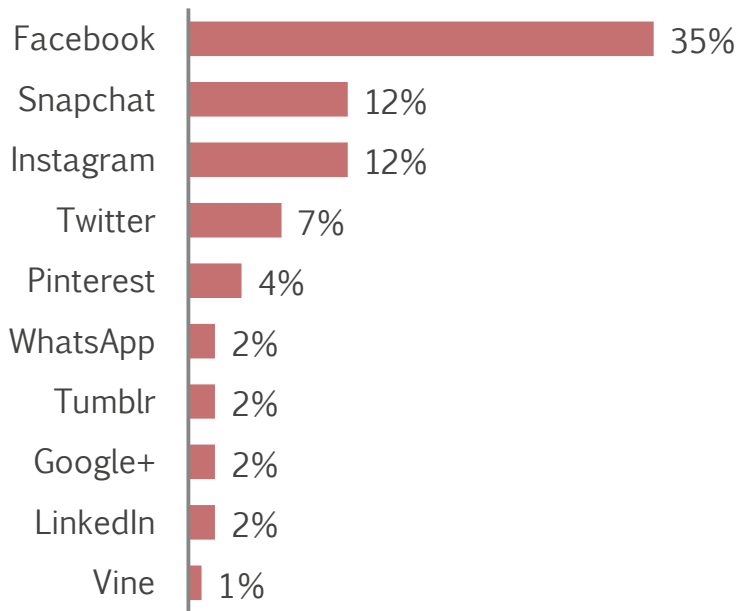
# Social Media Brand Usage

Total Population 12+



# Use Social Media Brand 'Several Times per Day'

Total Population 12+



% using social media brand "several times per day"

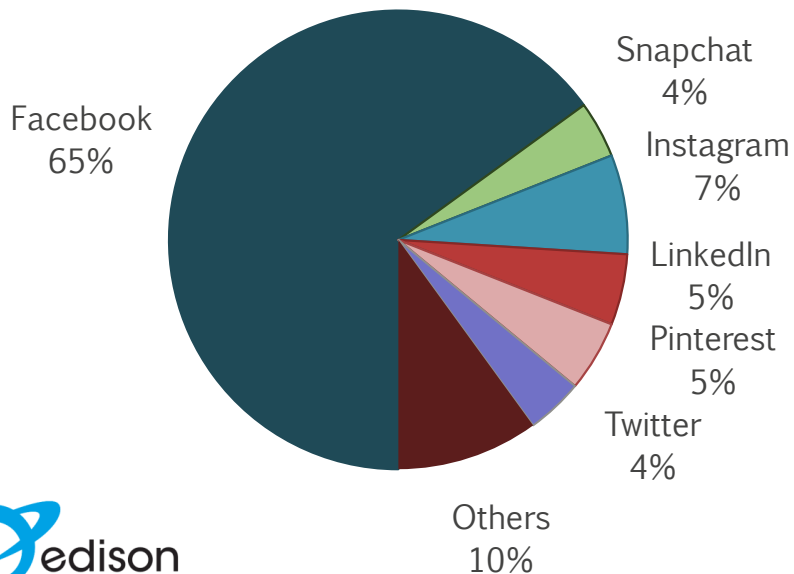


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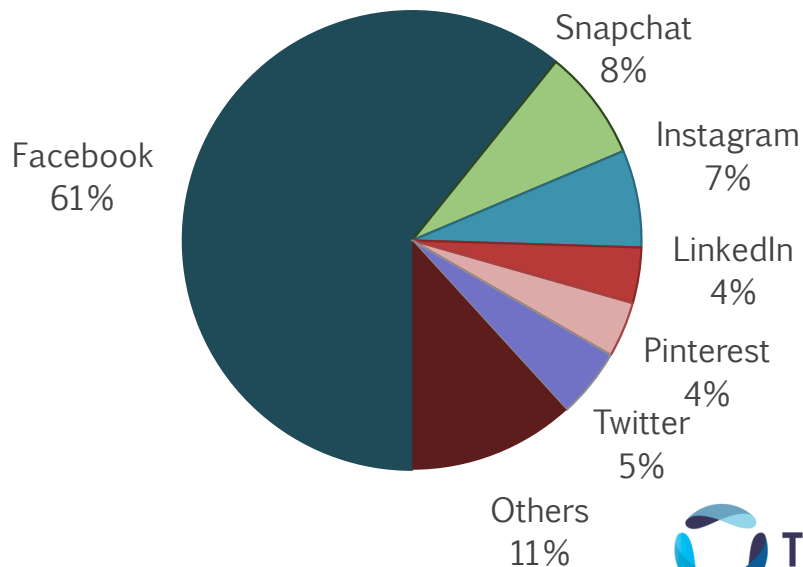
# Social Media Brand Used Most Often

Base: Currently use any social networking brands

2015



2016

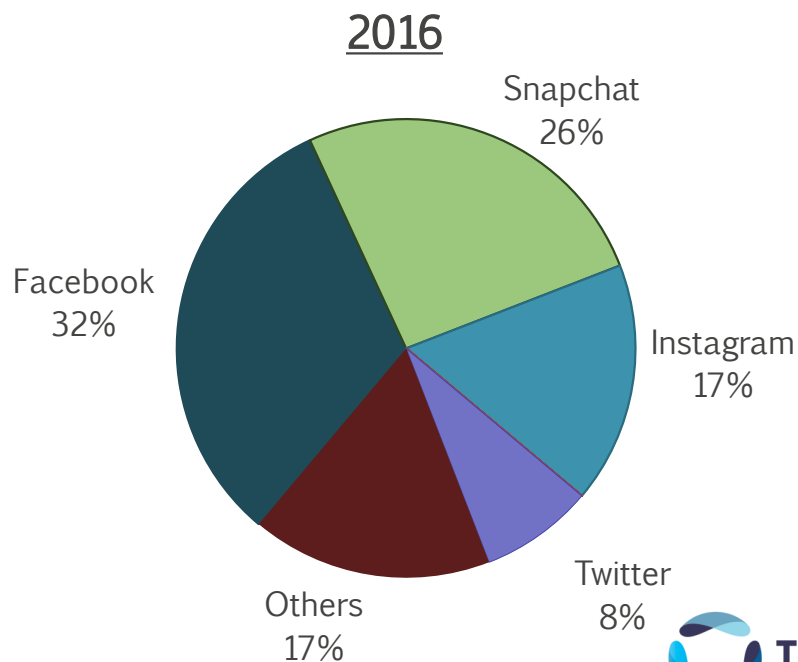
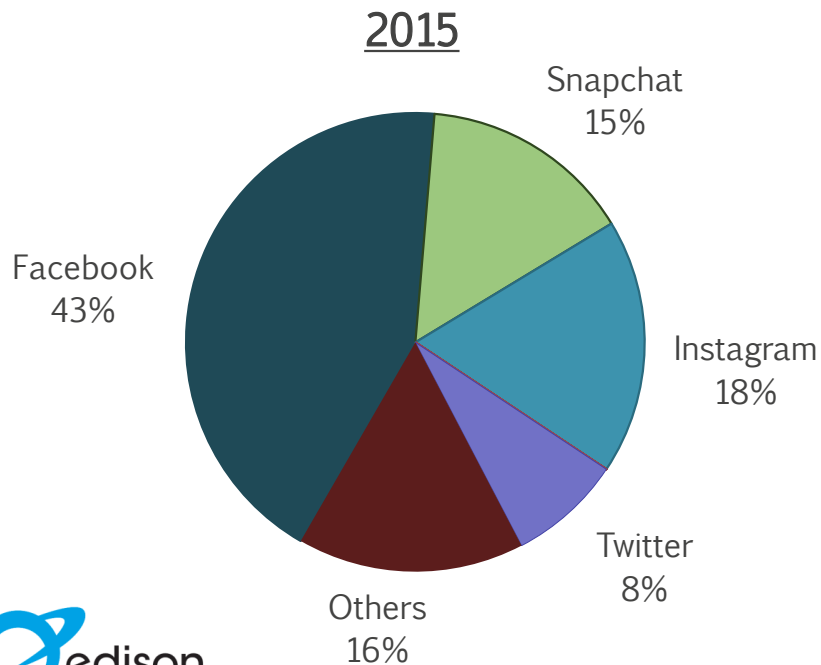




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# Social Media Brand Used Most Often (Age 12-24)

Base: Currently use any social networking brands





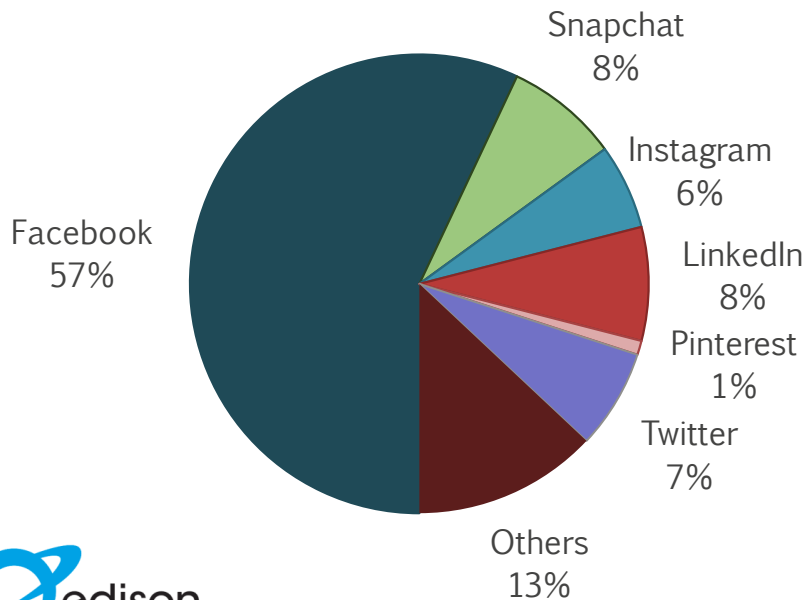


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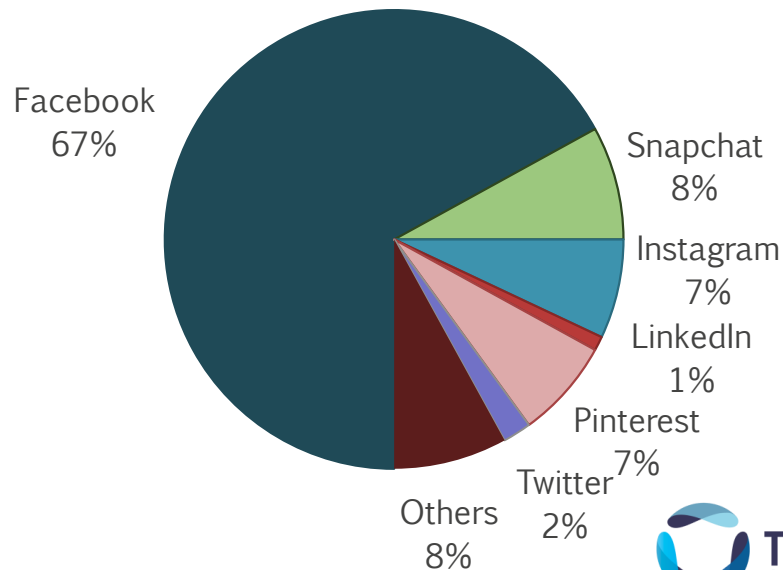
# Social Media Brand Used Most Often

Base: Currently use any social networking brands

## Men



## Women

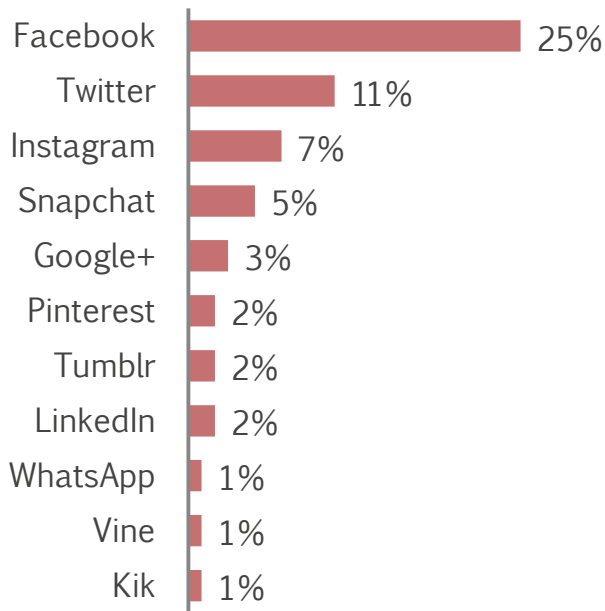




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# Use Social Media Brand to Follow Political News or Candidates

Total Population 12+



% using social media brand to follow political news/candidates





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# Conclusions and Observations

- The Smartphone has rewritten the media landscape
- Netflix and on-demand audio series smash the “attention span” myth



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# Conclusions and Observations

- “Over-the-air” radio has very real in-home “hardware” concerns
- Majority of 12-54s are regular online radio listeners—and that listening is becoming more and more habitual
- Pandora remains the clear leader in streaming services. Spotify has made major gains



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# Conclusions and Observations

- Nearly 100 million Americans have ever listened to a podcast—it has made the jump to mainstream
- Teens are flocking to Snapchat—and thus are increasingly harder to reach on social media



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