

Edison Research/Triton Digital's 25th edition of "The Infinite Dial" released on 3/19/17 highlights the convergence of audio across multiple platforms, and devices. Consumers have truly taken charge of how and where they consume media.

AM/FM Radio Highlights

Music Discovery

- AM/FM is the top electronic device for music discovery but there are shifts since 2016. Friends/family was listed as the #1 (68%) with YouTube and AM/FM nearly tied (64% and 63%, respectively).
 - Pandora is ranked at #4 (48%). Spotify is gaining traction (33%) but not at the expense of Facebook (41%).
- Among 12-24s, AM/FM is ranked #5 (50%) behind YouTube (80%), Friends/Family (77%), Spotify (59%) and Pandora (53%).

In-Car Listening

- AM/FM tops in-car among 18+ drivers/passengers: 82% list it as primary audio used in car, down slightly from 84% last year; 47% say they use AM/FM "most of the time" in primary car.
- Total online radio use in primary car rose to 26% (from 21% in 2016); 11% say they use online radio "most of the time" in primary car.

Online Radio Highlights (includes streamed AM/FM and pure-play Internet audio)

Monthly Listening

- 170MM persons per month listen to online radio - representing 61% of the 12+ population; up from 57% in 2016.
- Penetration continues among all age groups and highest among 12-24 (87%); 25-54, 70%; and 32% of 55+

Weekly Listening

- 140MM persons weekly - representing 53% of the 12+ population; up from 50% in 2016.
- Weekly penetration of 12-24 demo is 83%; 25-54, 59%; and 32% of 55+.
- Average weekly online TSL is nearly 14.7 hours, up from 12.1 hours last year.

Online Audio Brands

- Pandora has highest 12+ weekly reach (23%), followed by Spotify (15%), iHeartRadio (9%) and Apple Music (7%). Pandora is down from 25% last year.
- Pandora reaches about 1/3 of 12-24 and 25-54 year-olds weekly, 30% and 29% respectively; Spotify has gained with both of these age groups - 12-24 were 38% vs. 25% last year and 25-54 16% vs. 12% last year. iHeartRadio also saw increases among 12-24 (12% vs. 9% last year) but dropped among 25-54 (4% vs. 10% last year).
- Pandora has lost some "used most often" share to Spotify and other online sources trending from 54% in 2015 to 40% in 2017; Spotify nearly doubled from 2015 to 2017 (10% to 21%, respectively).

Podcast Highlights

- Podcast listening continues to grow with 112MM of 12+ population ever listened to a podcast (40%), up from 36% in 2016. Monthly podcast tune-in is estimated at 67MM (24% of 12+), weekly is 42MM (15%).
- Weekly podcast listeners average 5 podcasts per week – consistent with 2016.
- Podcasts' appeal leans more male vs. female (27% of men vs 21% of women in 2017).
- Majority of listeners access podcasts on smartphones/tablets/portable devices (65%) and 80% of podcast listening is done in the home.
- While podcast usage had never been included within the report before, 19% stated using podcasts in car (respondents 18+ driven/ridden last month).