



THE INFINITE DIAL 2021

The Infinite Dial 2021

#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 2021, Edison Research conducted a national telephone survey of 1507 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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Media & Technology



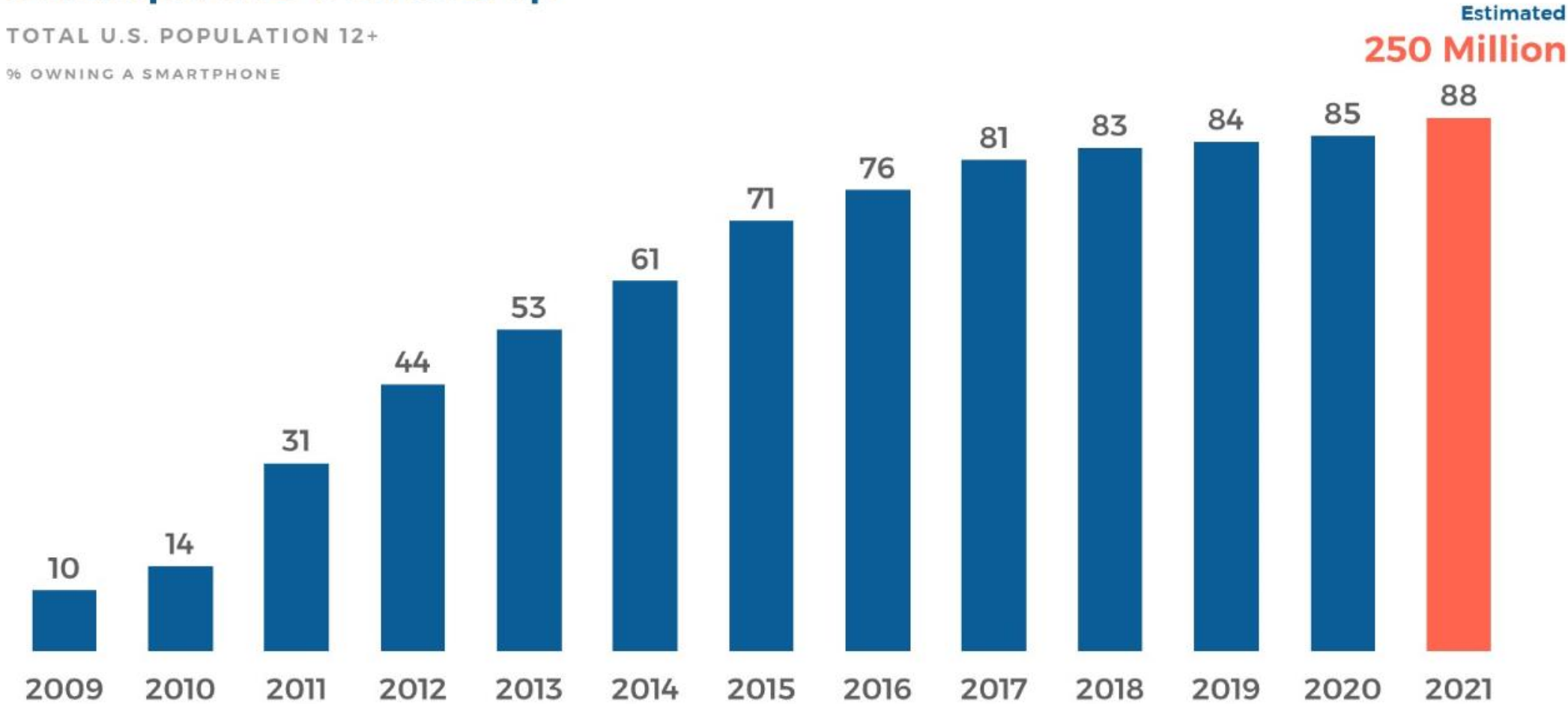
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Smartphone Ownership

TOTAL U.S. POPULATION 12+

% OWNING A SMARTPHONE

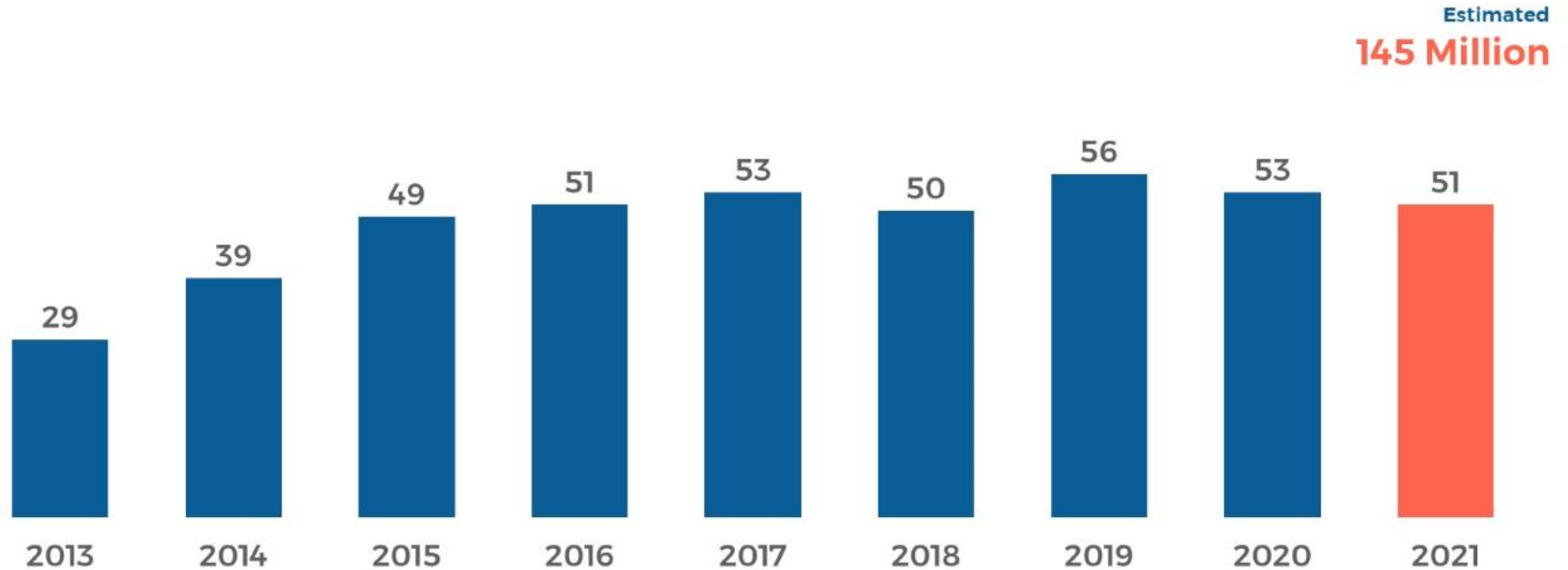


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Tablet Ownership

TOTAL U.S. POPULATION 12+

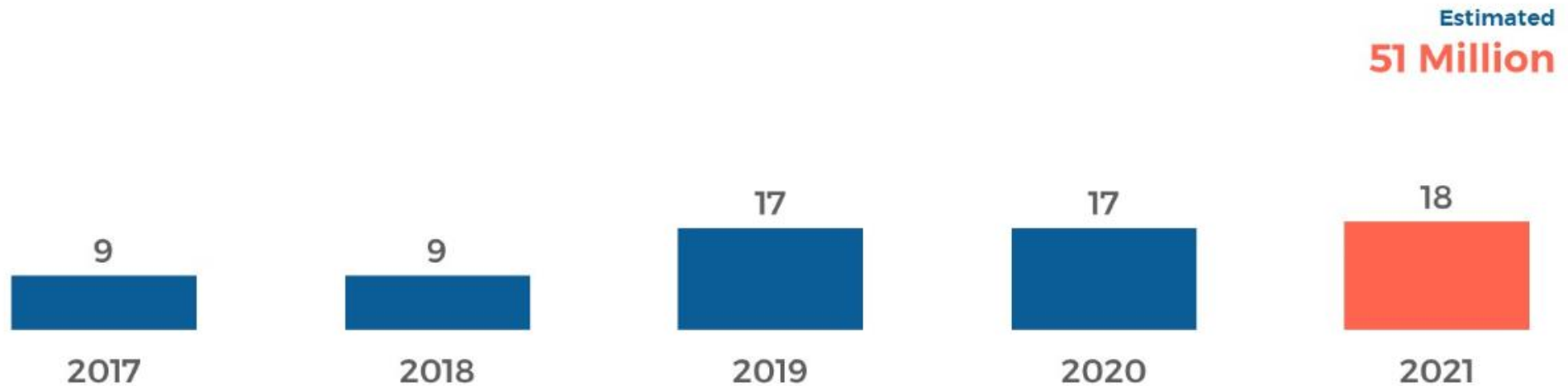
% OWNING A TABLET



Internet-connected Watch Ownership

TOTAL U.S. POPULATION 12+

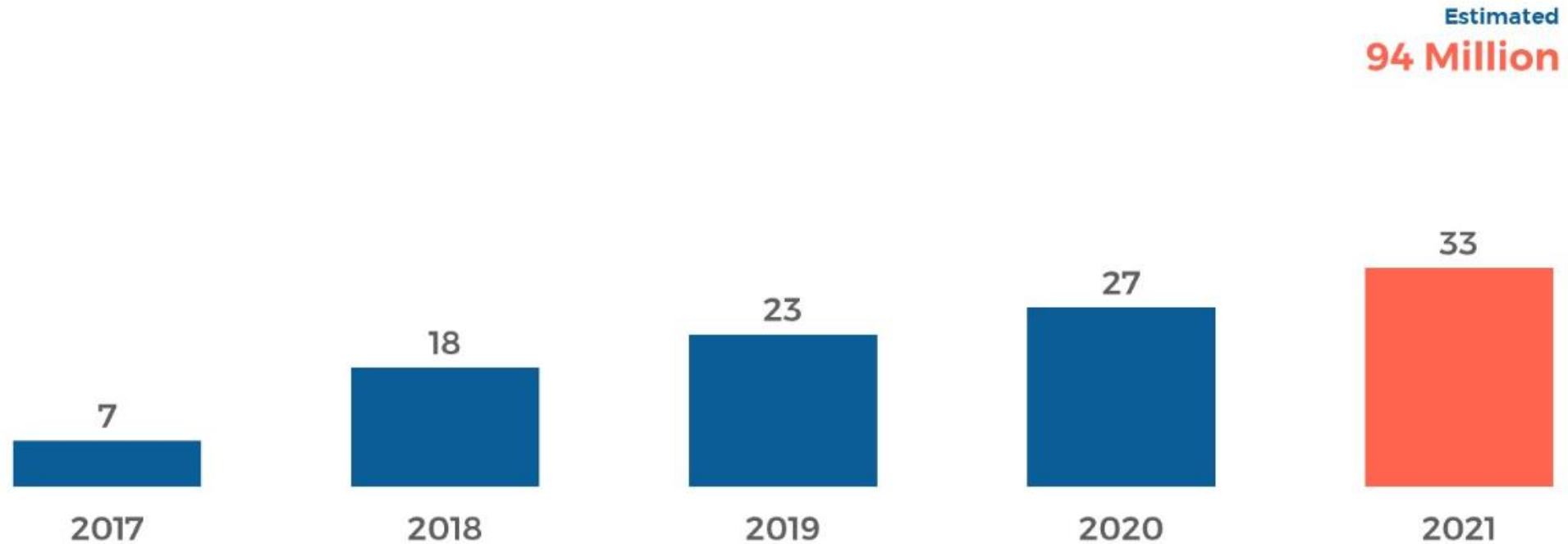
9% OWNING AN INTERNET-CONNECTED WATCH



Smart Speaker Ownership

TOTAL U.S. POPULATION 12+

% OWNING A SMART SPEAKER

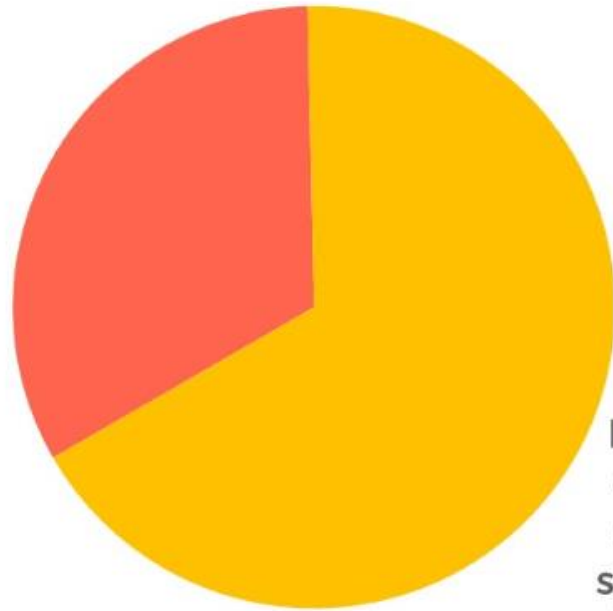


Smart Speaker Ownership

TOTAL U.S. POPULATION 12+

U.S. POPULATION 12+

Own a
smart
speaker
33%

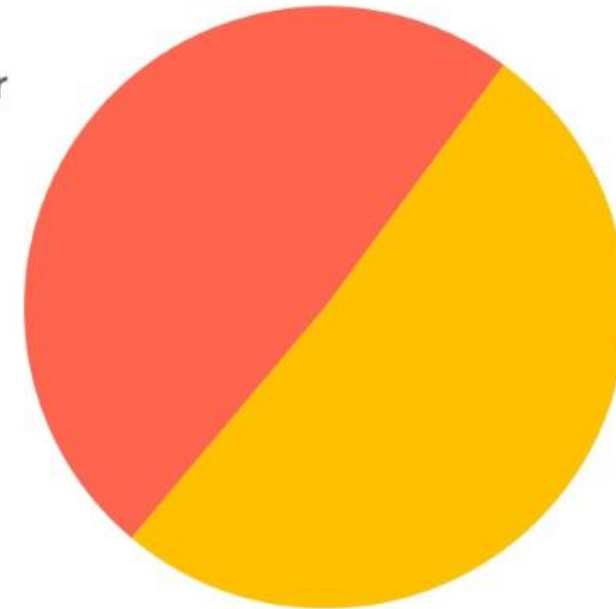


Do not
own a
smart
speaker
67%

WORK FROM HOME

(BASE: EMPLOYED FULL-TIME OR PART-TIME
AND WORK FROM HOME; 11%)

Own a
smart
speaker
49%

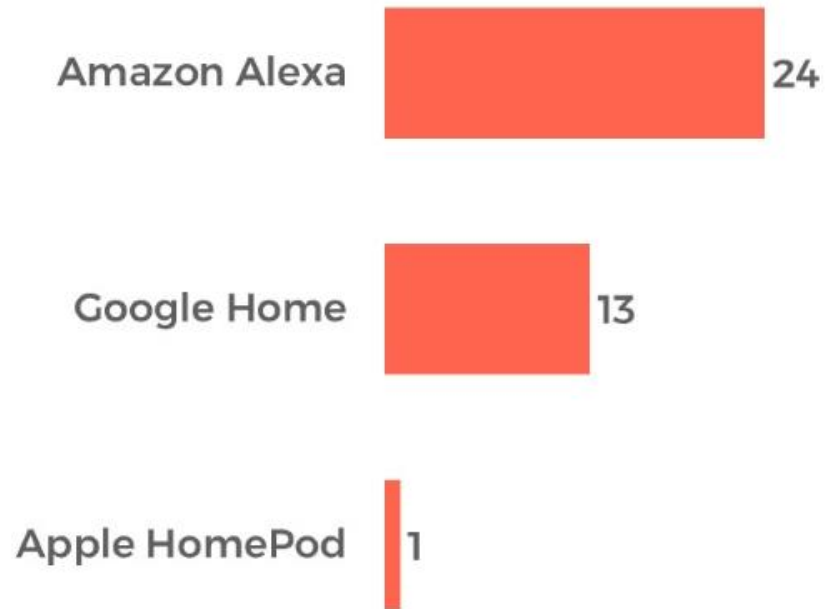


Do not
own a
smart
speaker
51%

Smart Speaker Ownership

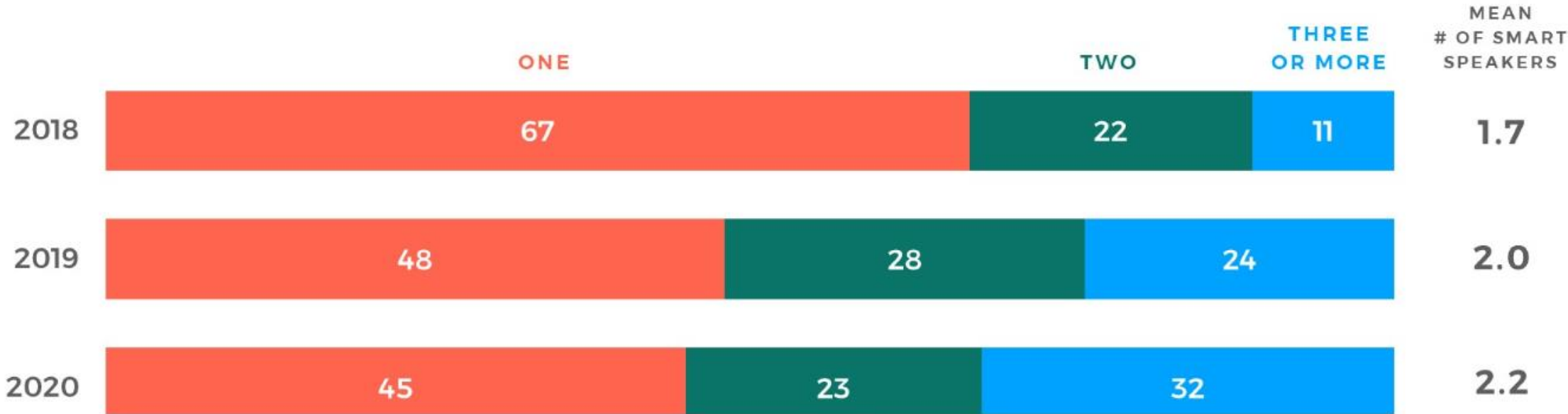
TOTAL U.S. POPULATION 12+

96 OWNING SMART SPEAKER



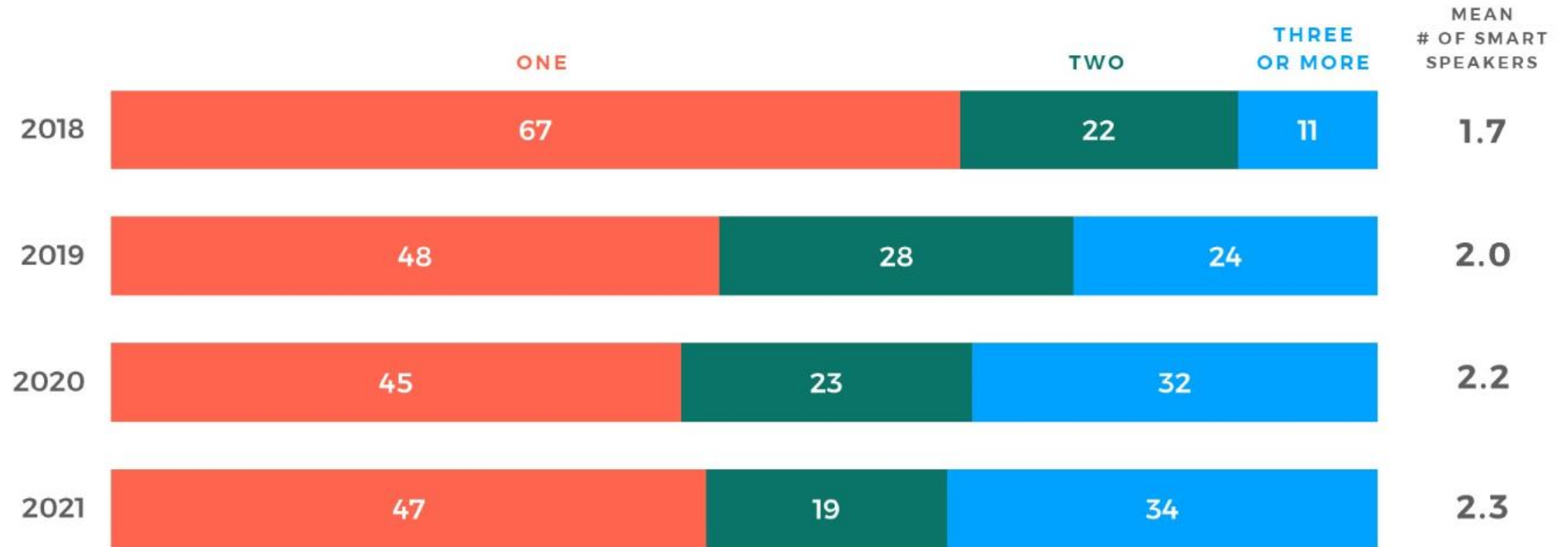
Number of Smart Speakers in Household

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



Number of Smart Speakers in Household

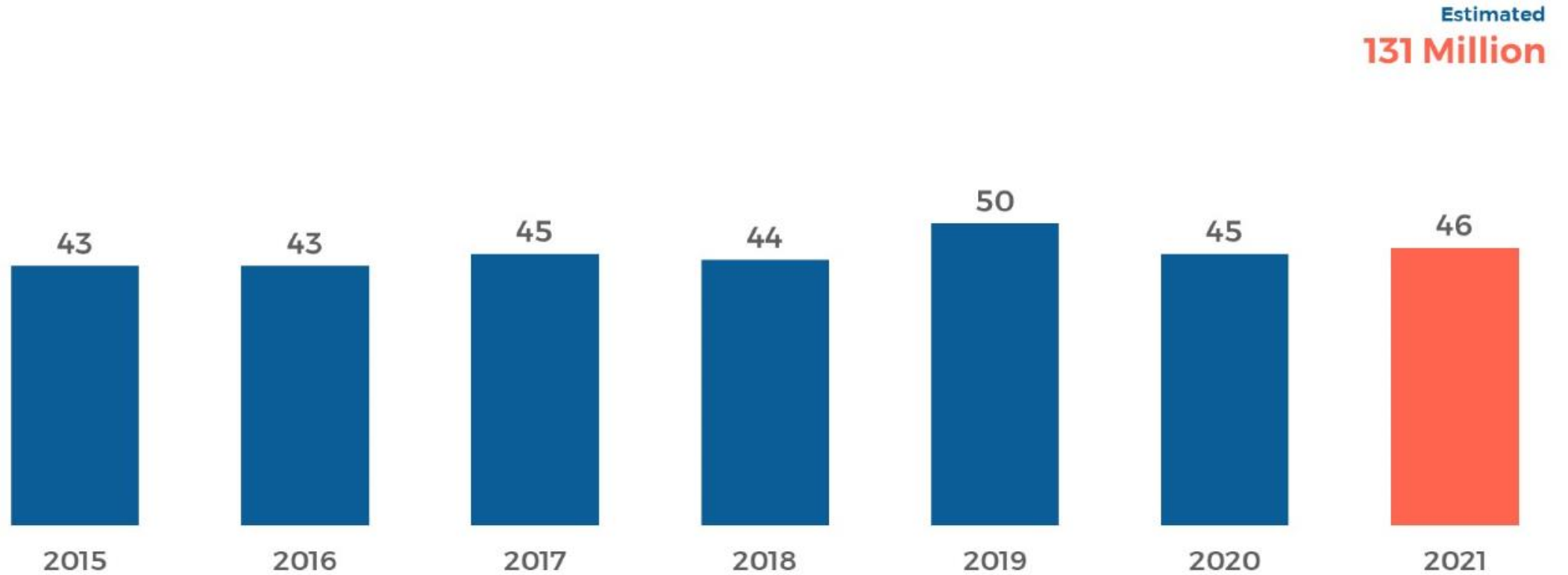
BASE: U.S. AGE 12+ SMART SPEAKER OWNERS



Audiobook Listening

TOTAL U.S. POPULATION 12+

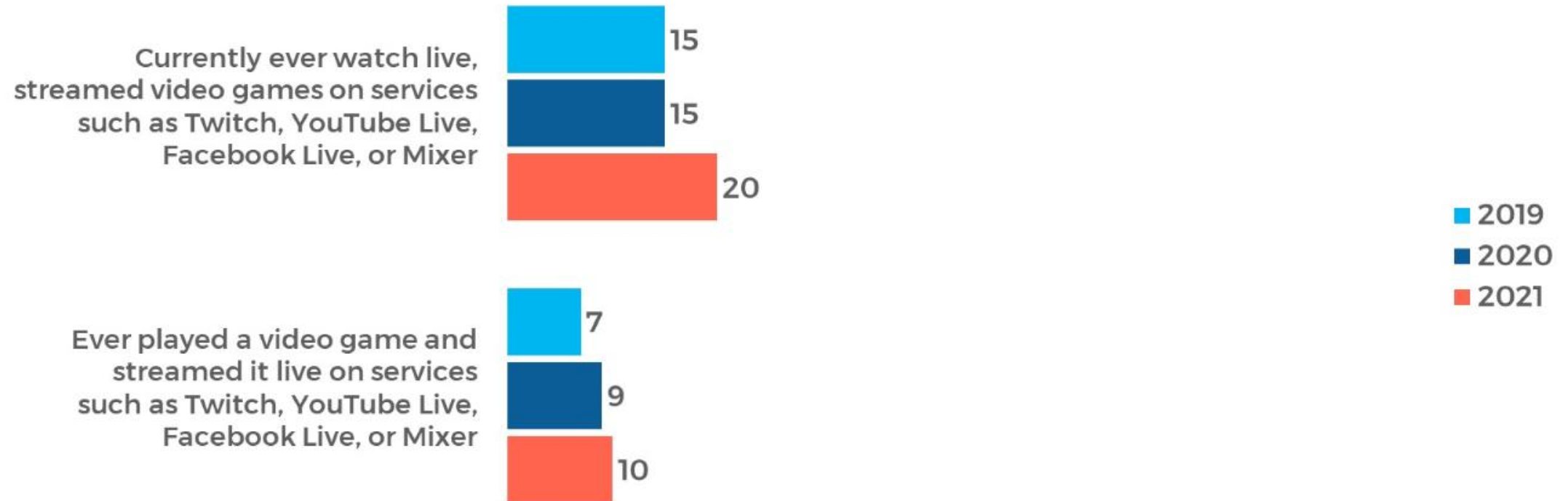
% EVER LISTENED TO AN AUDIOBOOK



Live Streamed Video Games

TOTAL U.S. POPULATION 12+

96 SAYING YES



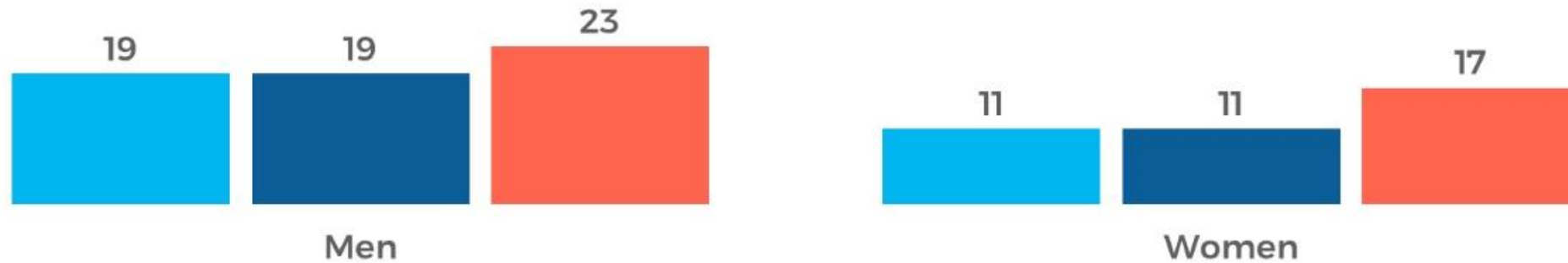
Currently Ever Watch Live Streamed Video Games

TOTAL U.S. POPULATION 12+

96 SAYING YES

“Do you currently ever watch live, streamed video games on services such as Twitch, YouTube Live, Facebook Live, or Mixer?”

■ 2019 ■ 2020 ■ 2021



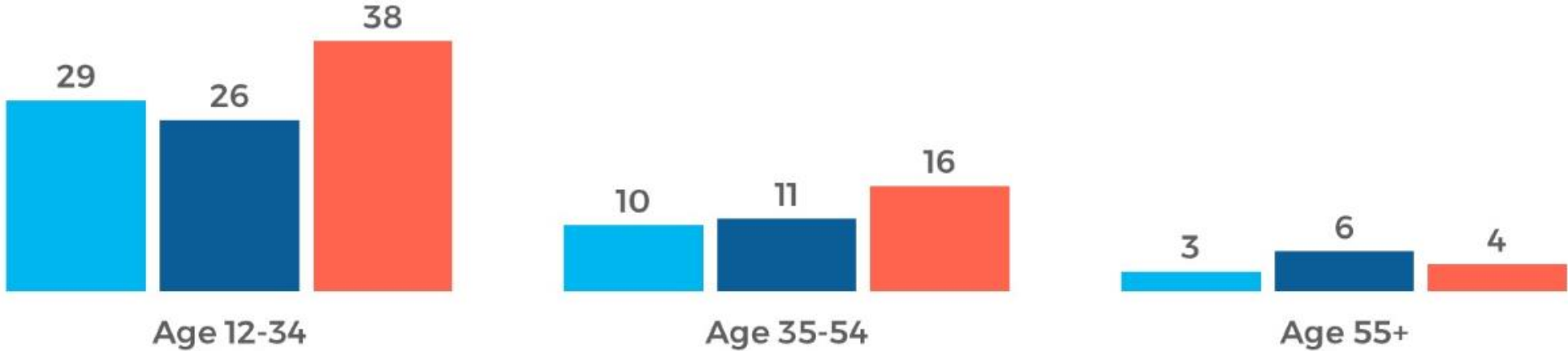
Currently Ever Watch Live Streamed Video Games

TOTAL U.S. POPULATION 12+

96 SAYING YES

“Do you currently ever watch live, streamed video games on services such as Twitch, YouTube Live, Facebook Live, or Mixer?”

■ 2019 ■ 2020 ■ 2021



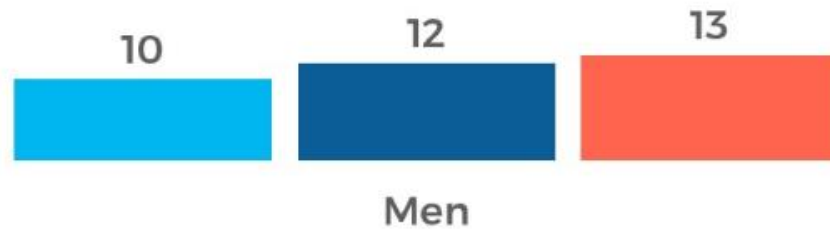
Ever Played a Video Game and Streamed it Live

TOTAL U.S. POPULATION 12+

96 SAYING YES

“Have you ever played a video game and streamed it live on services such as Twitch, YouTube Live, Facebook Live, or Mixer?”

■ 2019 ■ 2020 ■ 2021



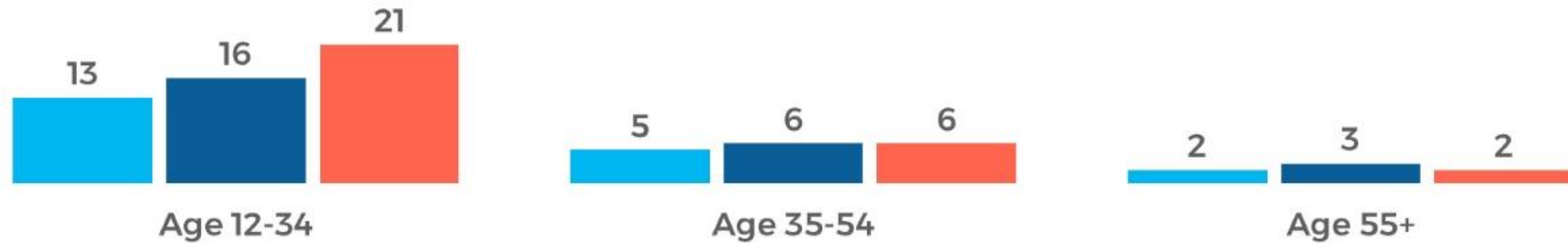
Ever Played a Video Game and Streamed It Live

TOTAL U.S. POPULATION 12+

96 SAYING YES

“Have you ever played a video game and streamed it live on services such as Twitch, YouTube Live, Facebook Live, or Mixer?”

■ 2019 ■ 2020 ■ 2021



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Social Media



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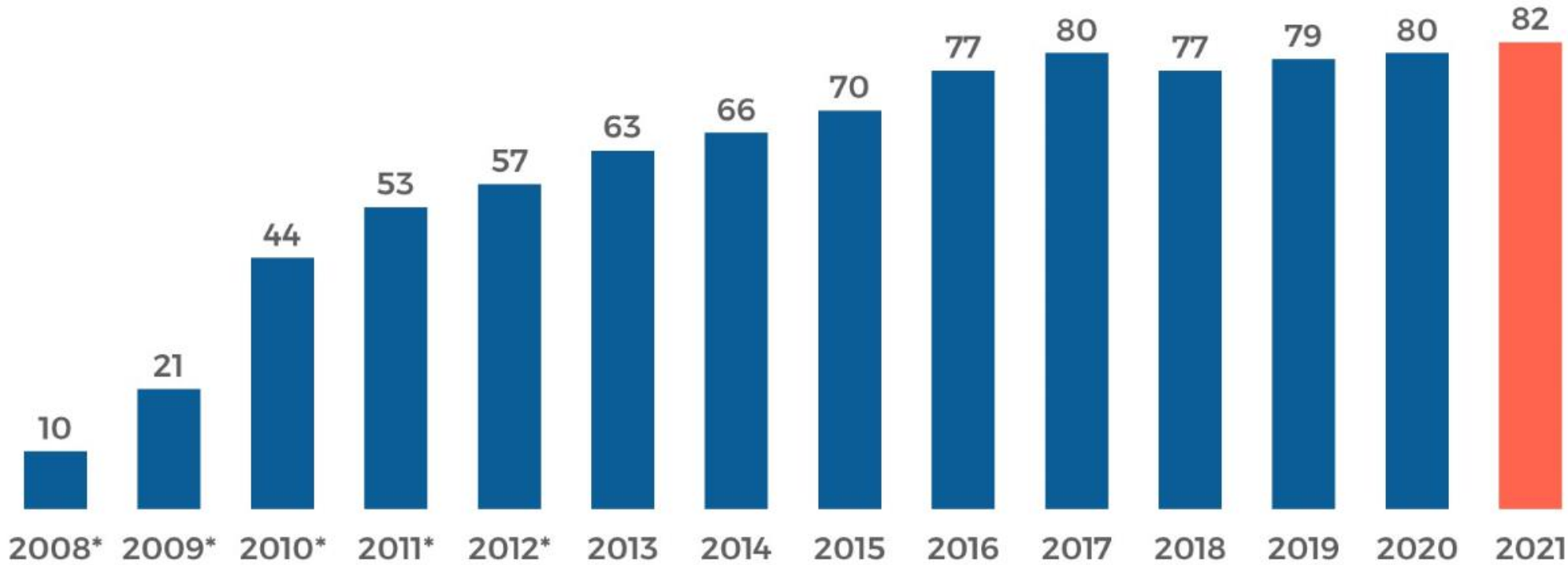
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Social Media Usage

TOTAL U.S. POPULATION 12+

96 USING SOCIAL MEDIA

Estimated
233 Million



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

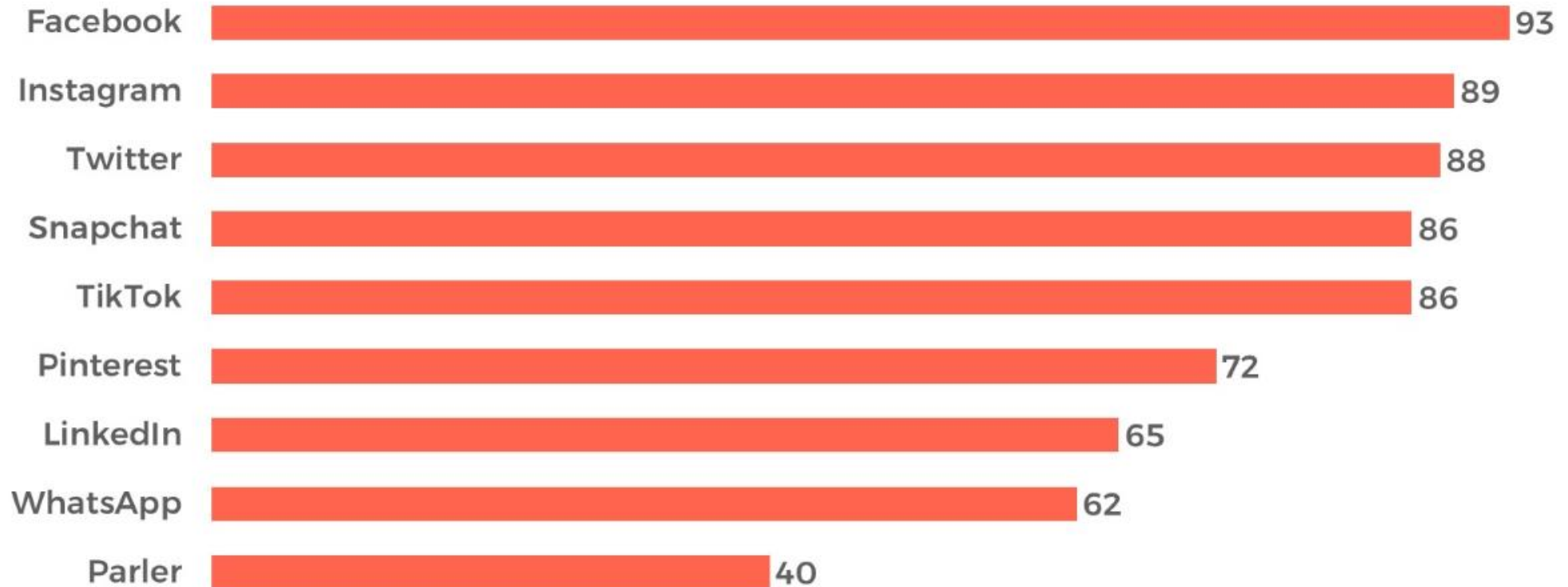


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Social Media Brand Awareness

TOTAL U.S. POPULATION 12+

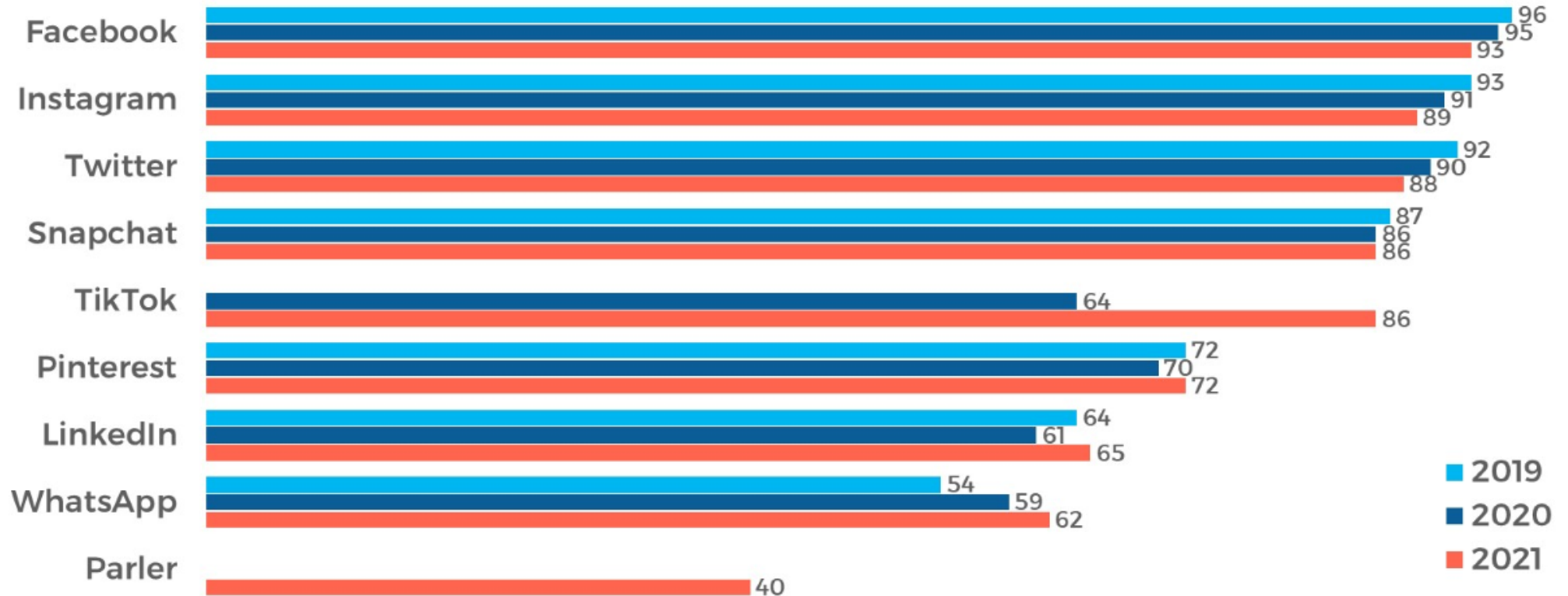
96 AWARE OF SOCIAL MEDIA BRAND



Social Media Brand Awareness

TOTAL U.S. POPULATION 12+

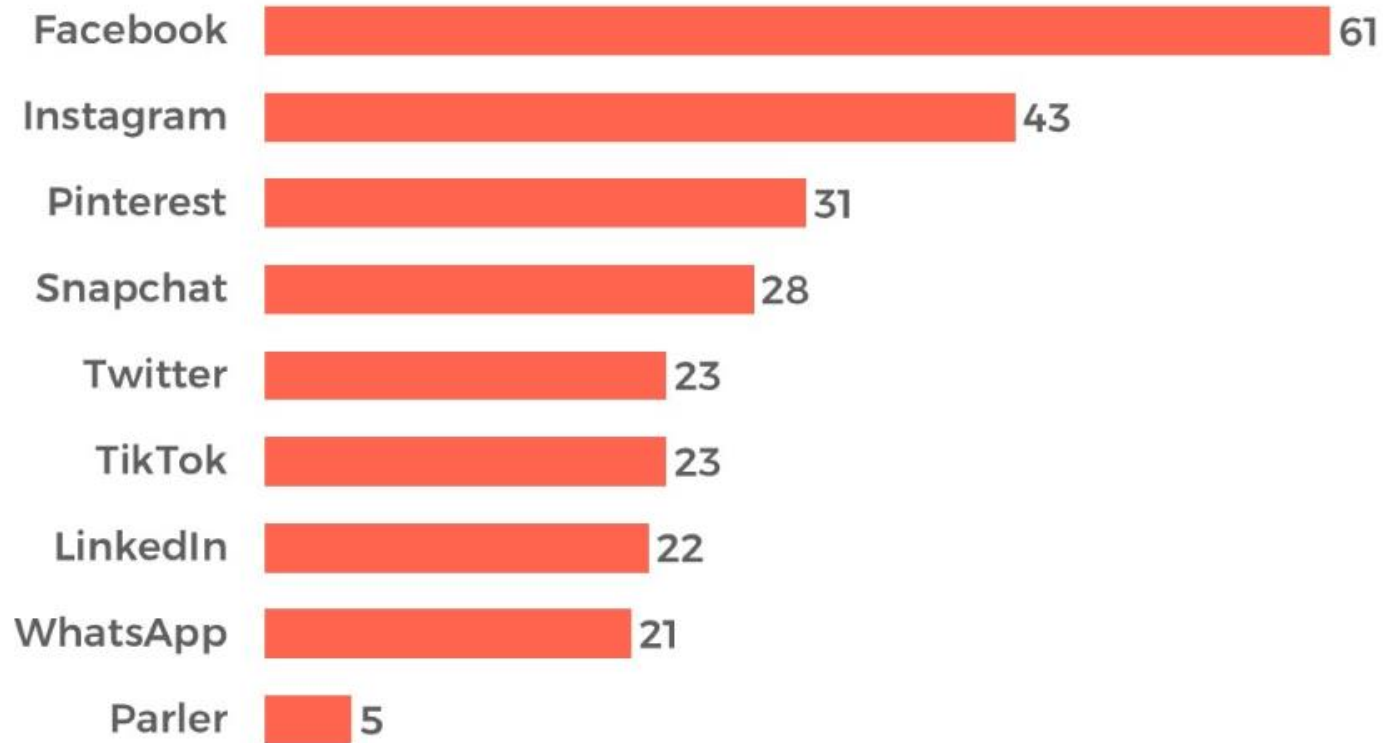
% AWARE OF SOCIAL MEDIA BRAND



Social Media Brand Usage

TOTAL U.S. POPULATION 12+

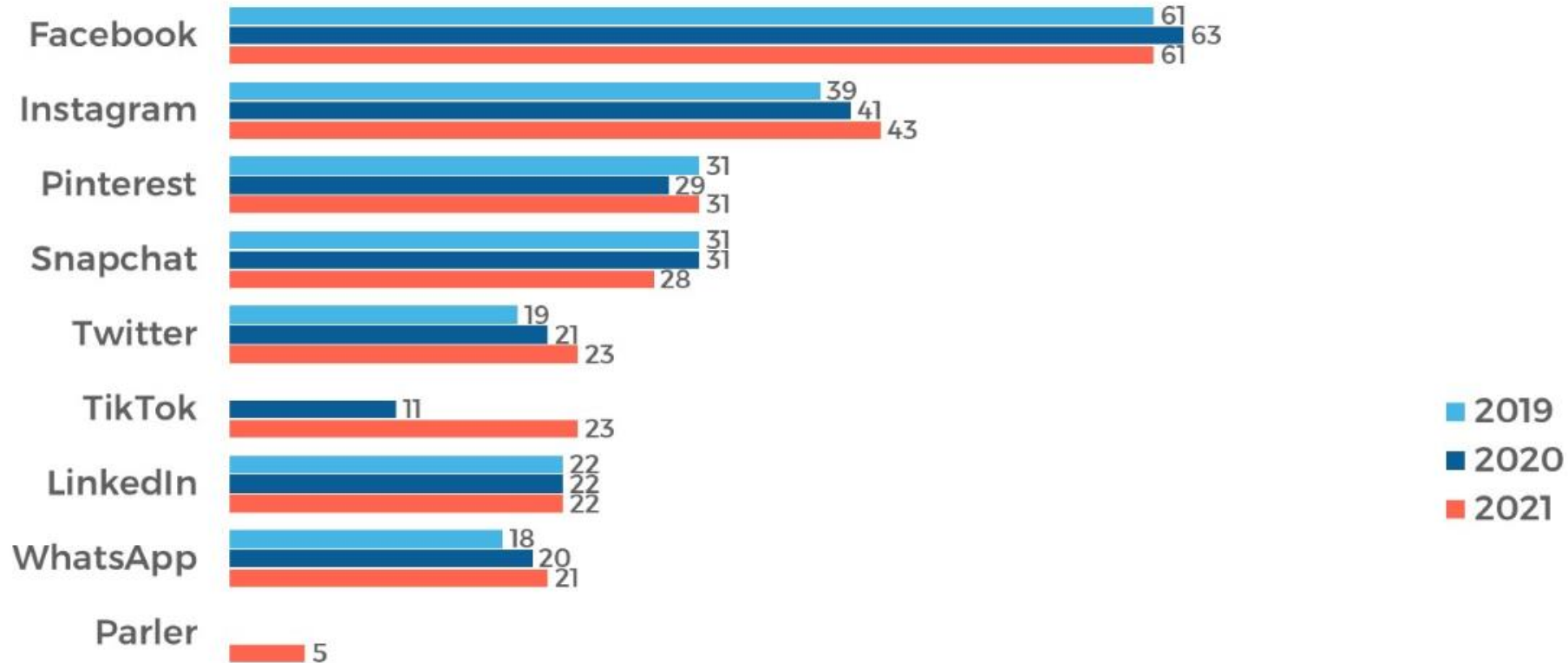
% USING SOCIAL MEDIA BRAND



Social Media Brand Usage

TOTAL U.S. POPULATION 12+

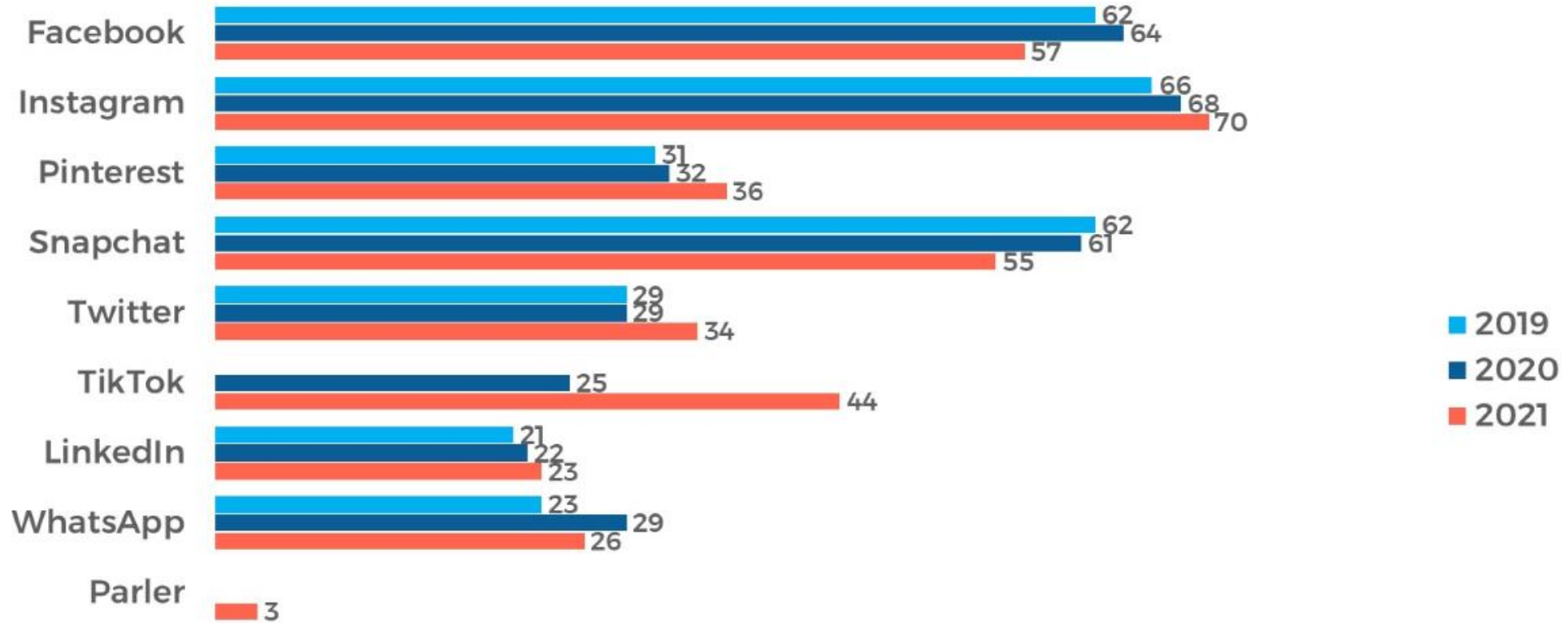
96 USING SOCIAL MEDIA BRAND



Social Media Brand Usage (Age 12-34)

U.S. POPULATION

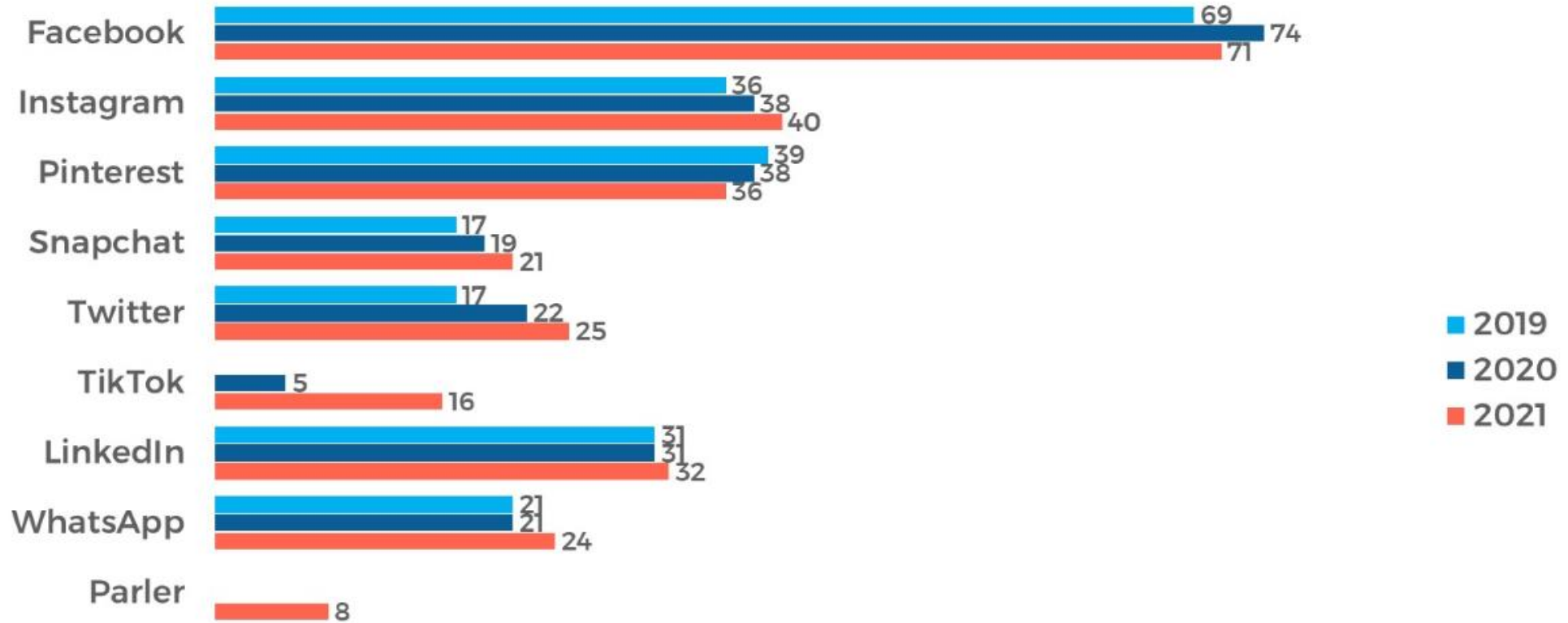
96 USING SOCIAL MEDIA BRAND



Social Media Brand Usage (Age 35-54)

U.S. POPULATION

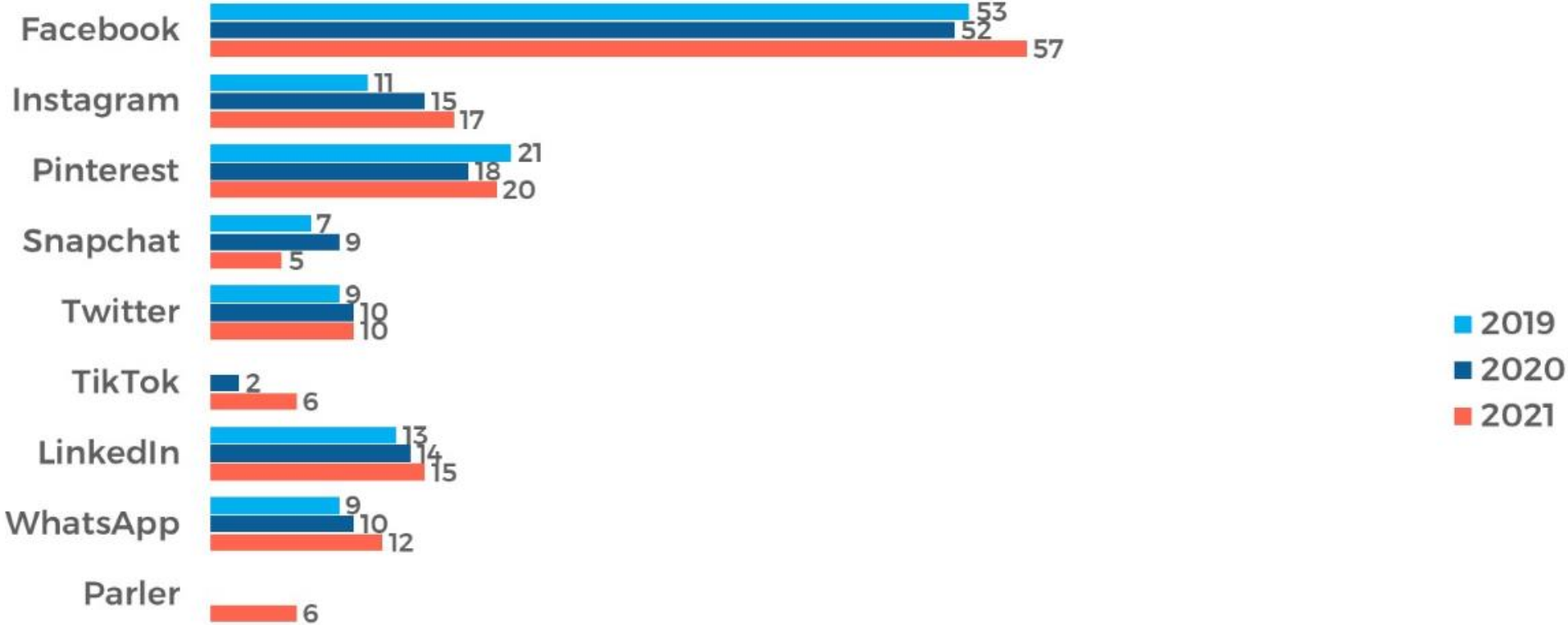
96 USING SOCIAL MEDIA BRAND



Social Media Brand Usage (Age 55 and older)

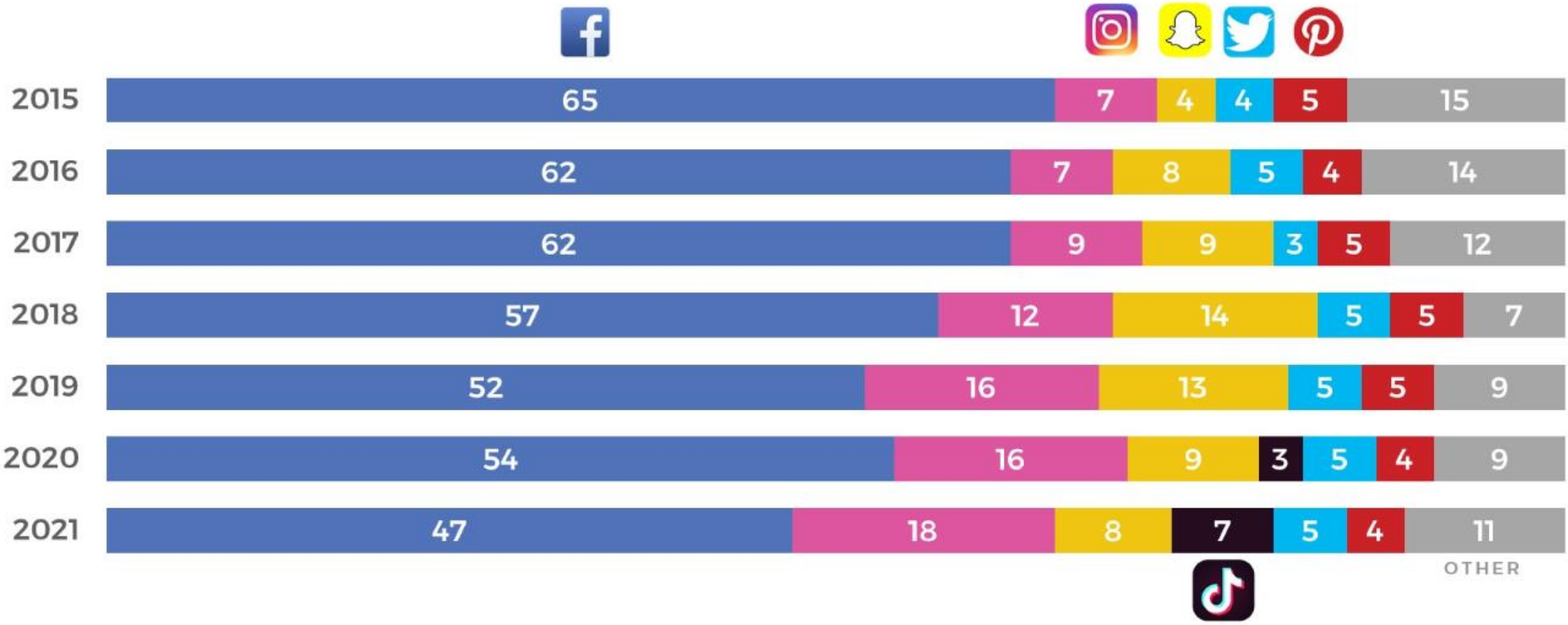
U.S. POPULATION

96 USING SOCIAL MEDIA BRAND



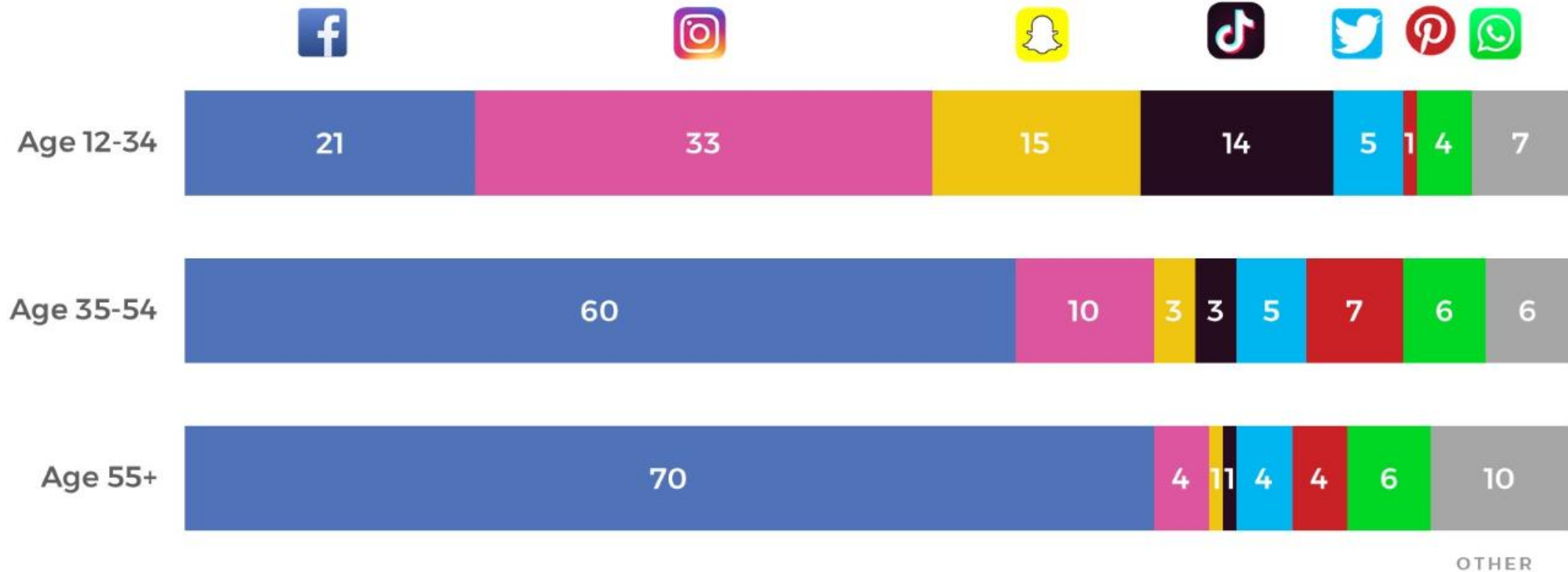
Social Media Brand Used Most Often

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



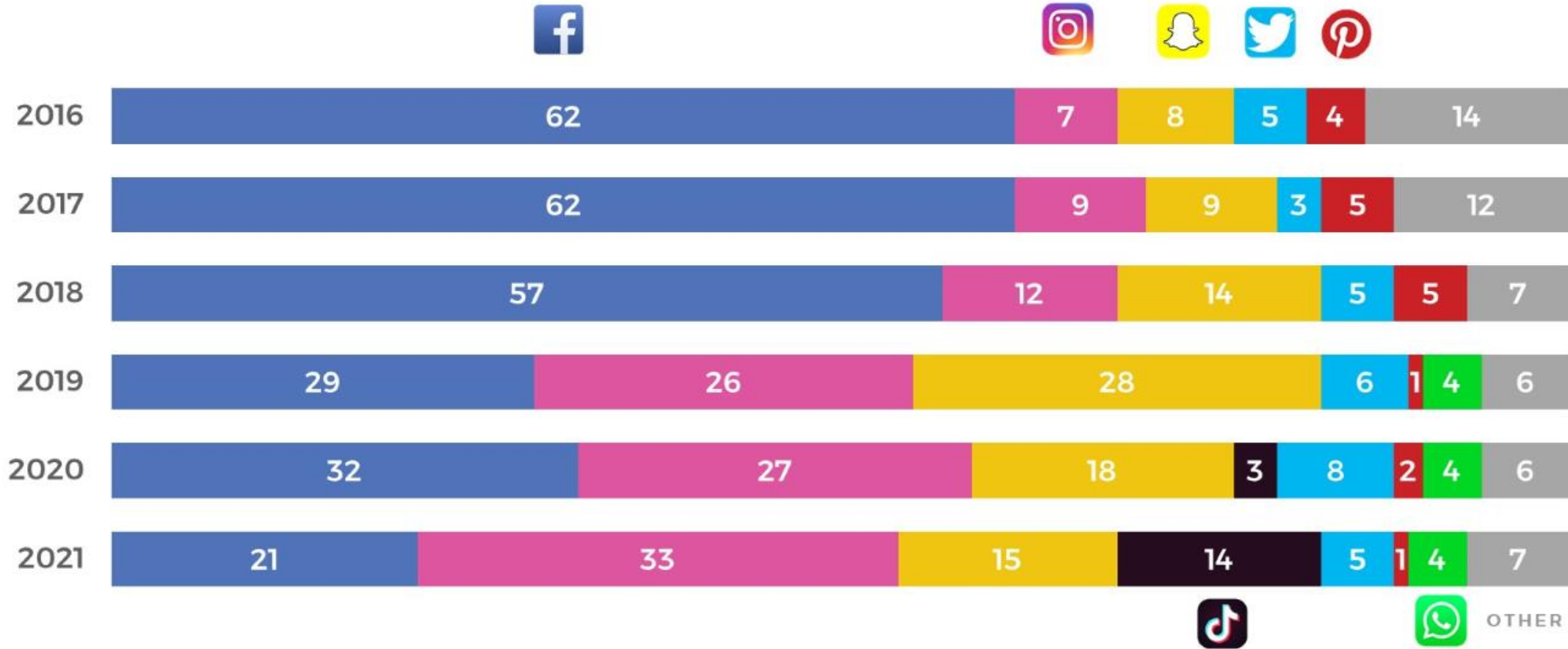
Social Media Brand Used Most Often

BASE: U.S. SOCIAL MEDIA USERS



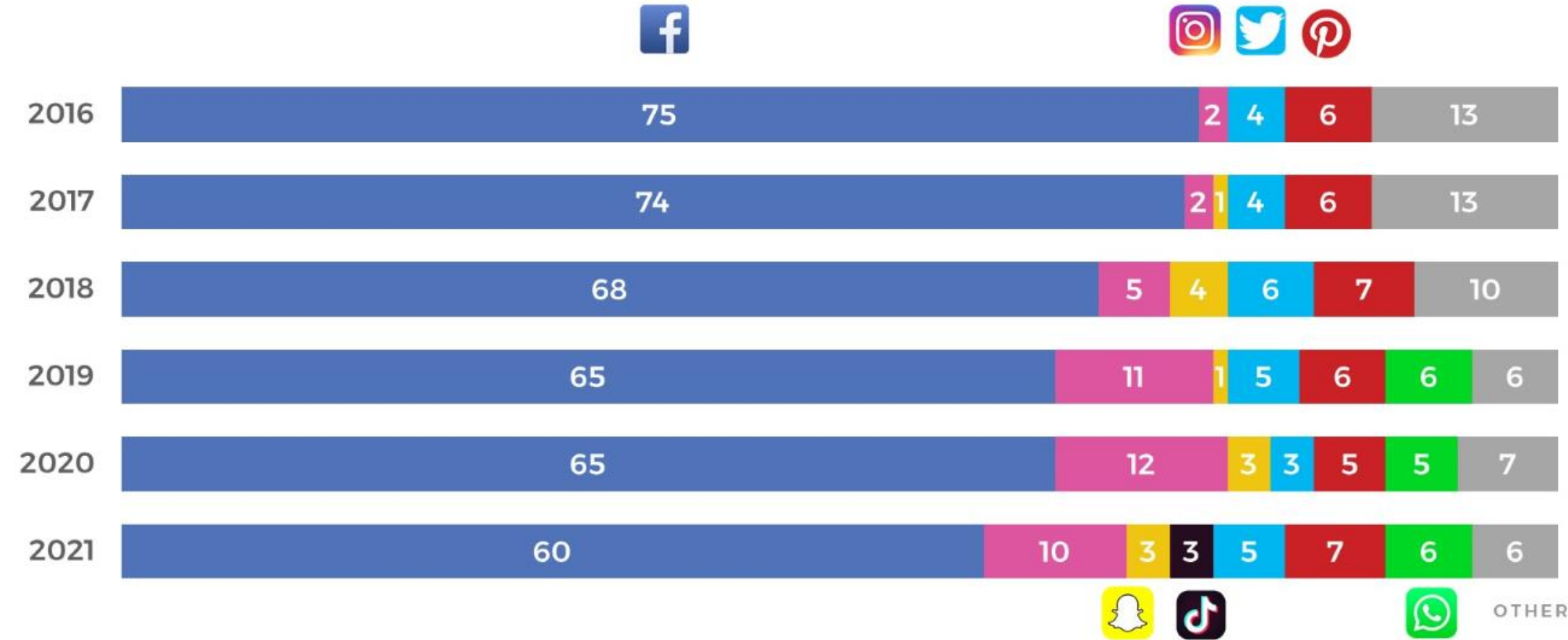
Social Media Brand Used Most Often (Age 12-34)

BASE: U.S. SOCIAL MEDIA USERS



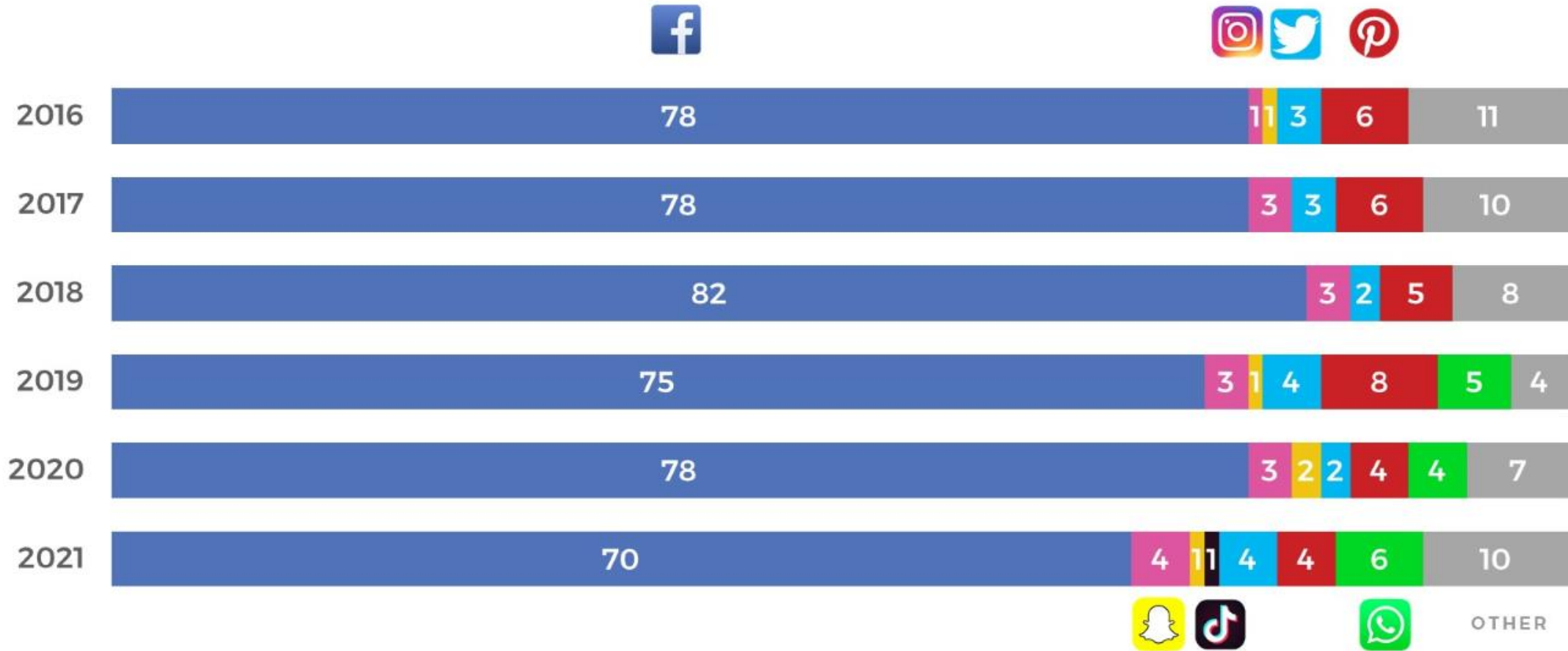
Social Media Brand Used Most Often (Age 35-54)

BASE: U.S. SOCIAL MEDIA USERS



Social Media Brand Used Most Often (Age 55+)

BASE: U.S. SOCIAL MEDIA USERS



 THE INFINITE DIAL 2021

Online Audio



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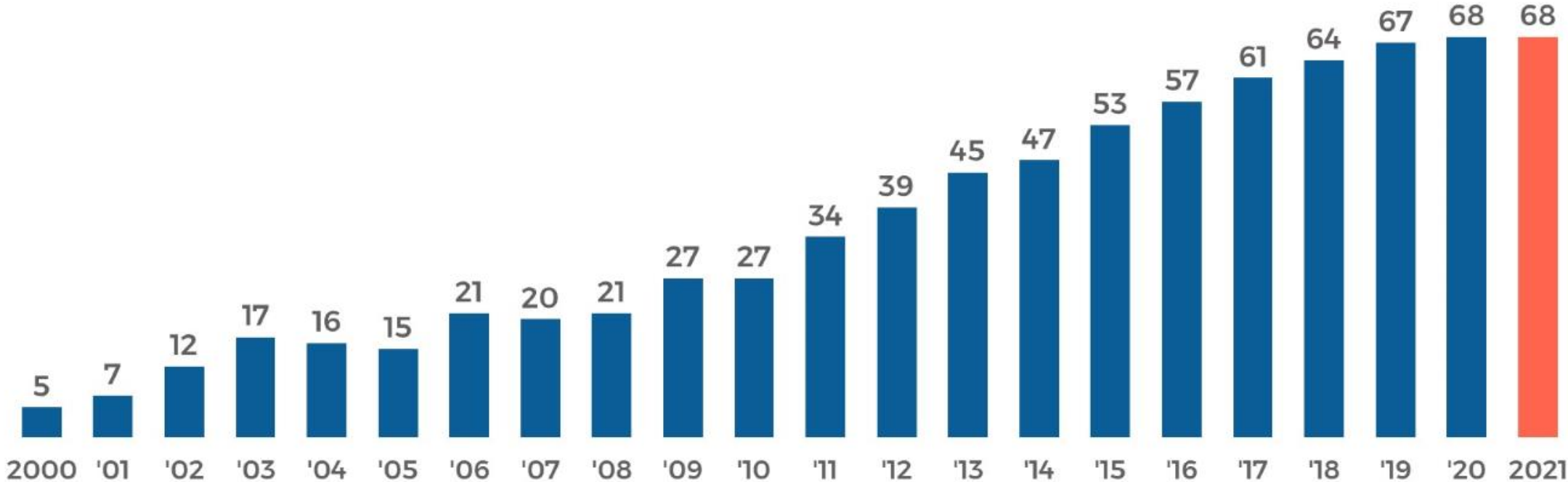
Monthly Online Audio Listening

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
193 Million



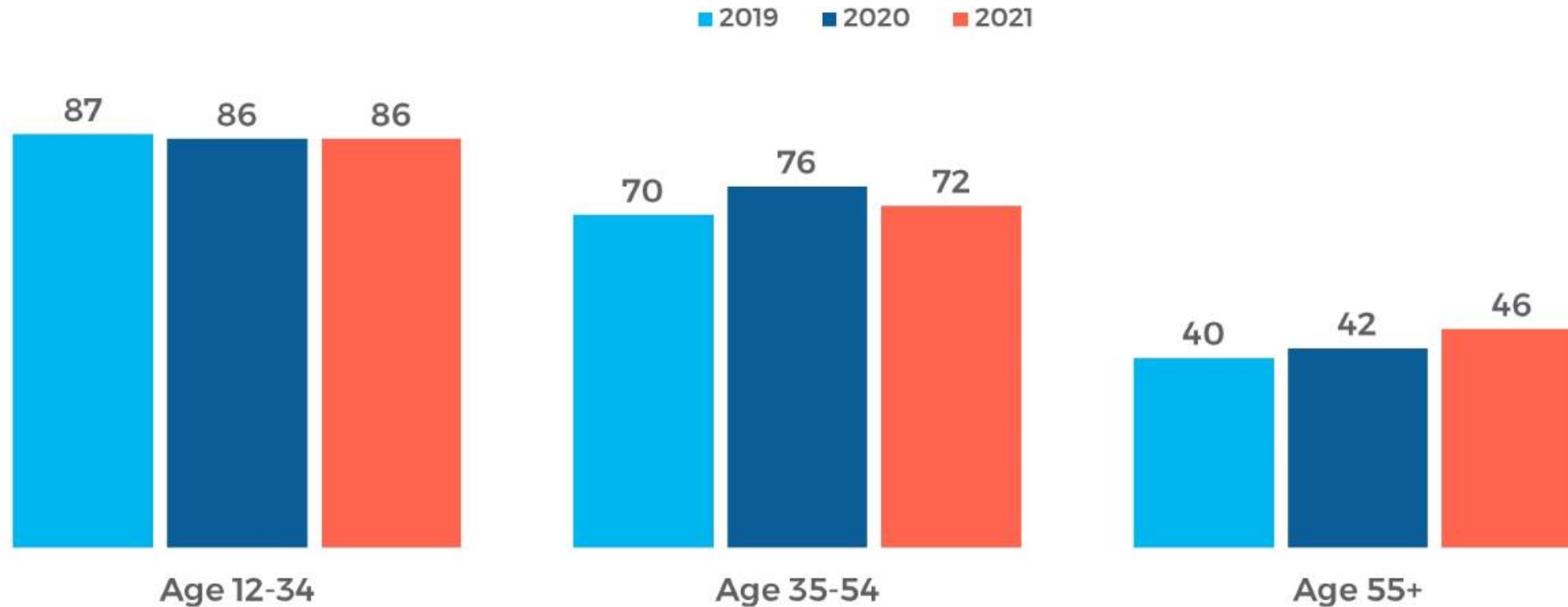
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Monthly Online Audio Listening

U.S. POPULATION

96 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



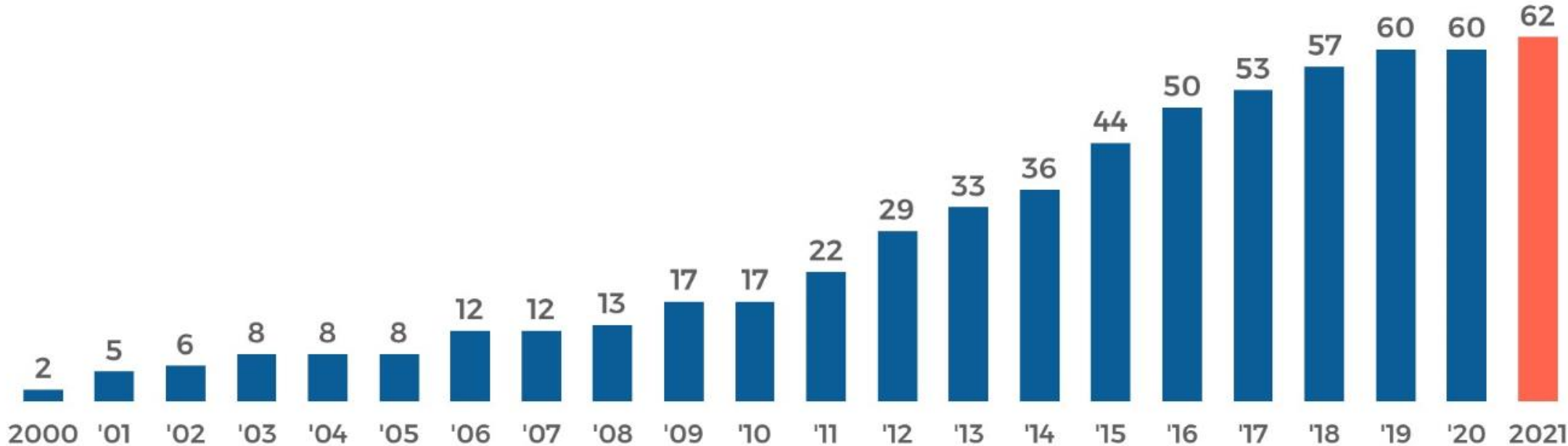
Weekly Online Audio Listening

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

Estimated
176 Million

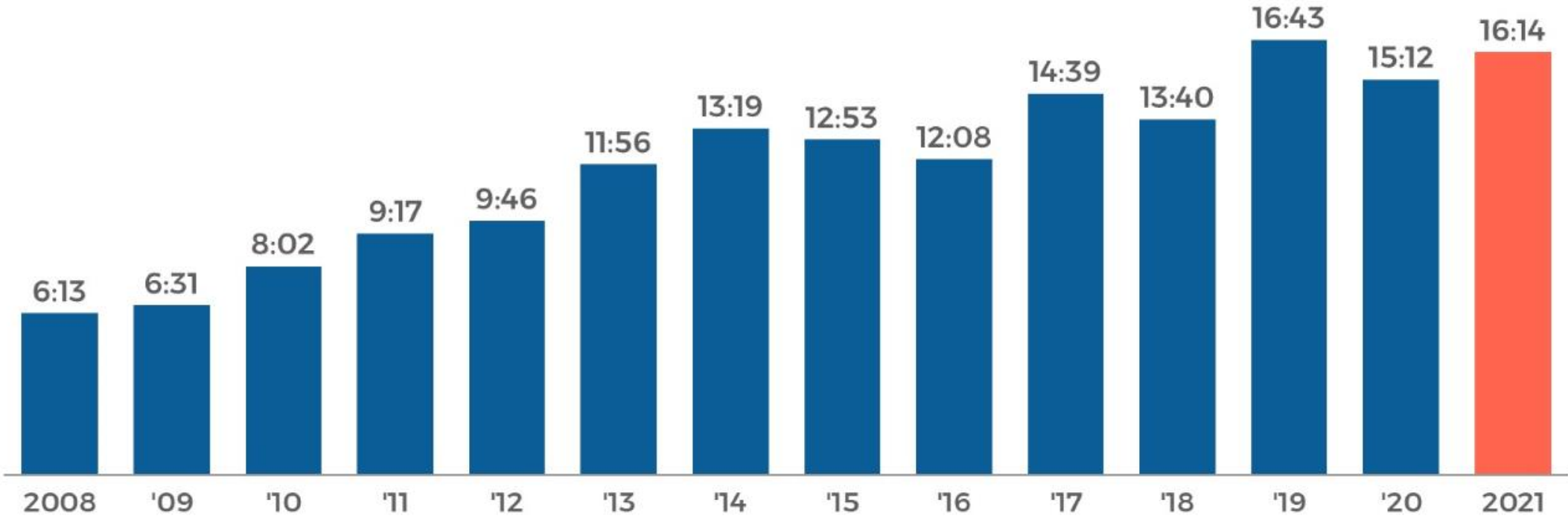


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Average Time Spent Listening to Online Audio

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

HOURS:MINUTES IN LAST WEEK



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Online Audio Brands



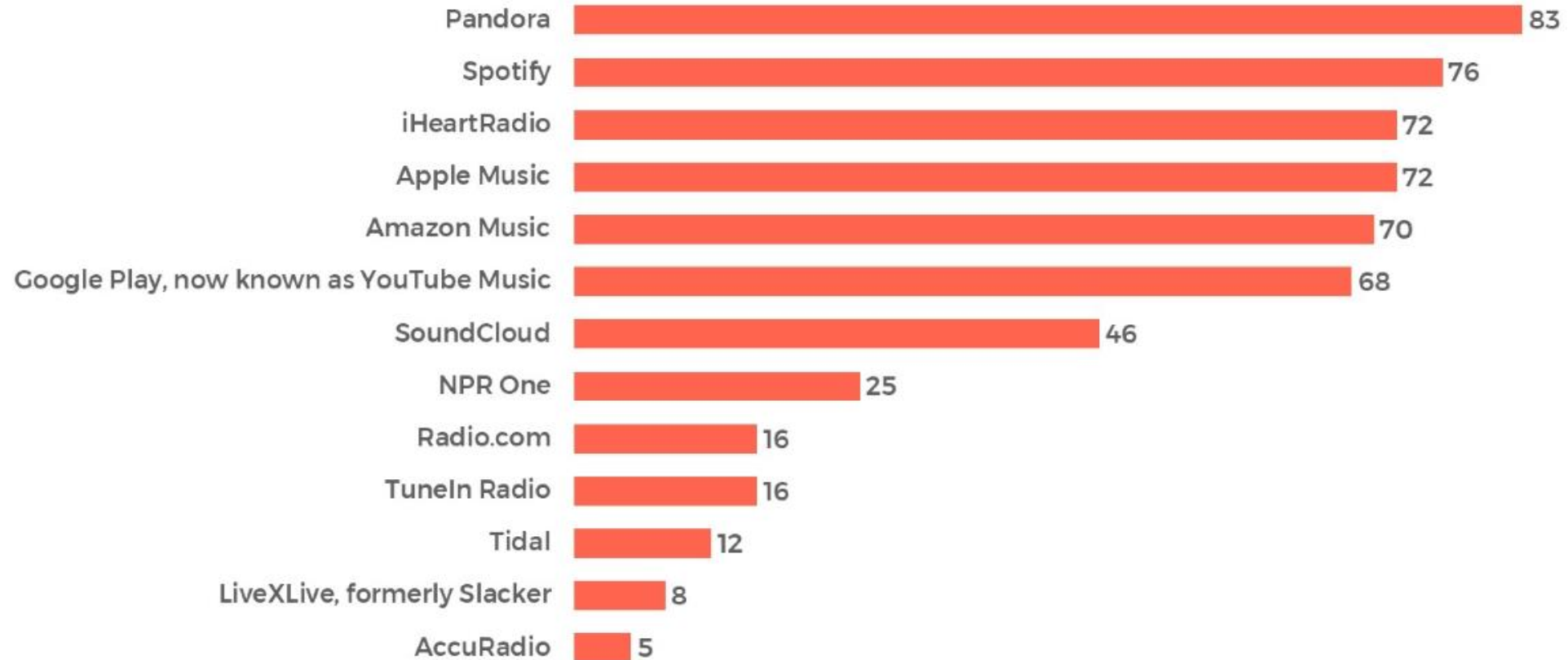
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Online Audio Brand Awareness

TOTAL U.S. POPULATION 12+

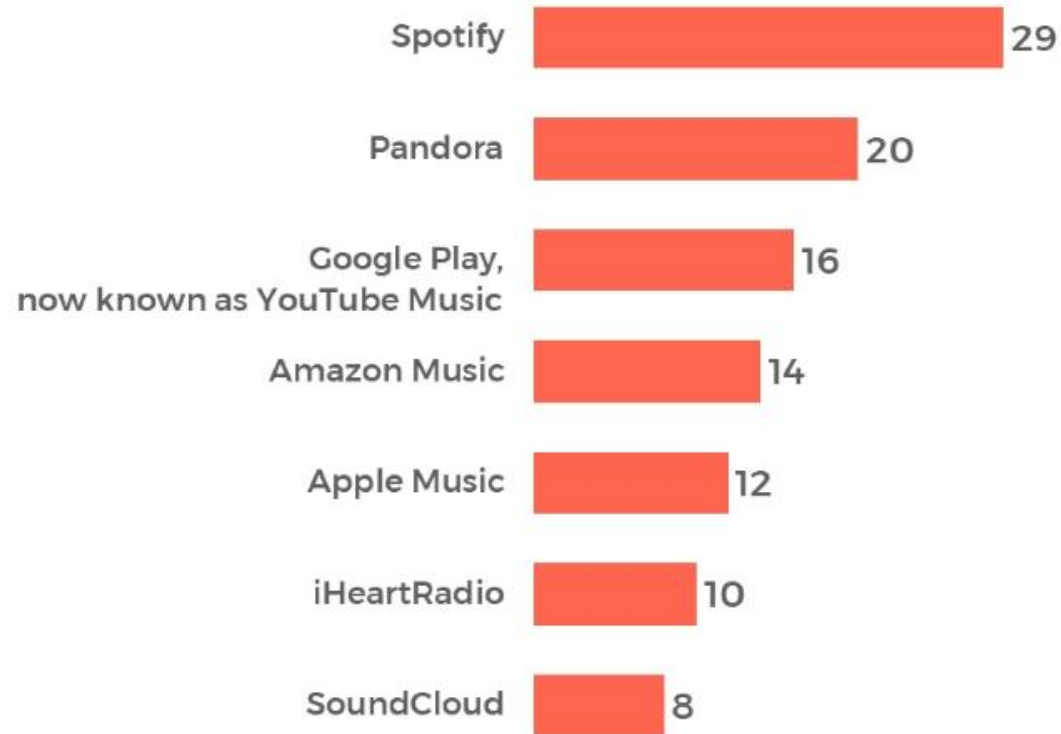
% AWARE OF ONLINE AUDIO BRAND



Online Audio Brands Listened to in Last Month

TOTAL U.S. POPULATION 12+

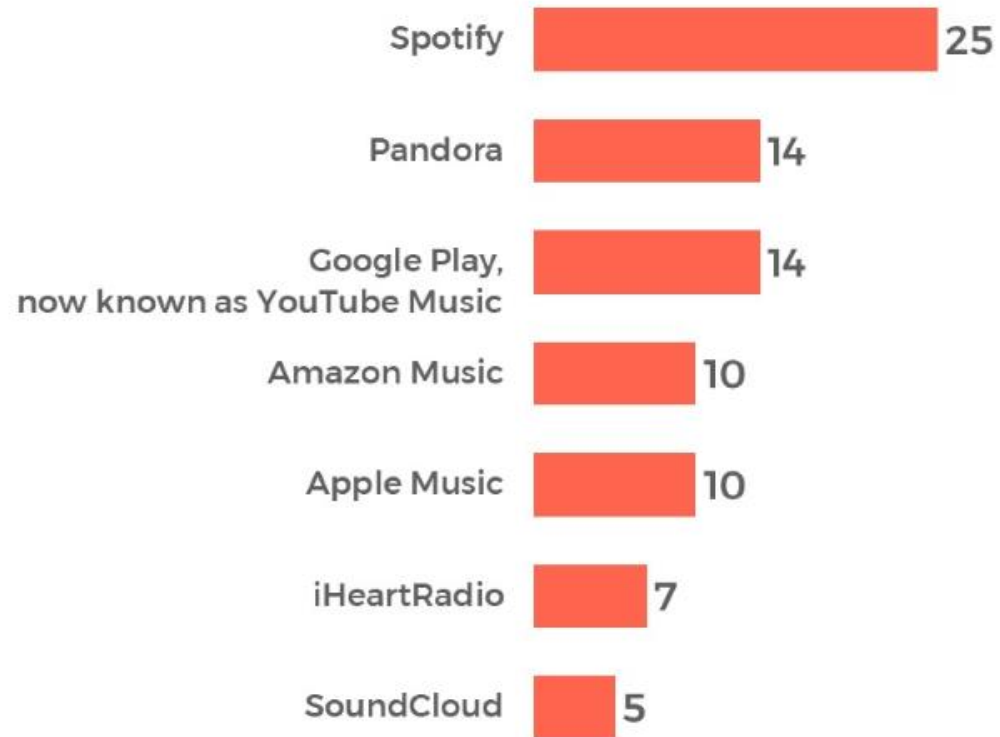
% LISTENED TO ONLINE AUDIO BRAND IN LAST MONTH



Online Audio Brands Listened to in Last Week

TOTAL U.S. POPULATION 12+

% LISTENED TO ONLINE AUDIO BRAND IN LAST WEEK



Online Audio Brand Used Most Often

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



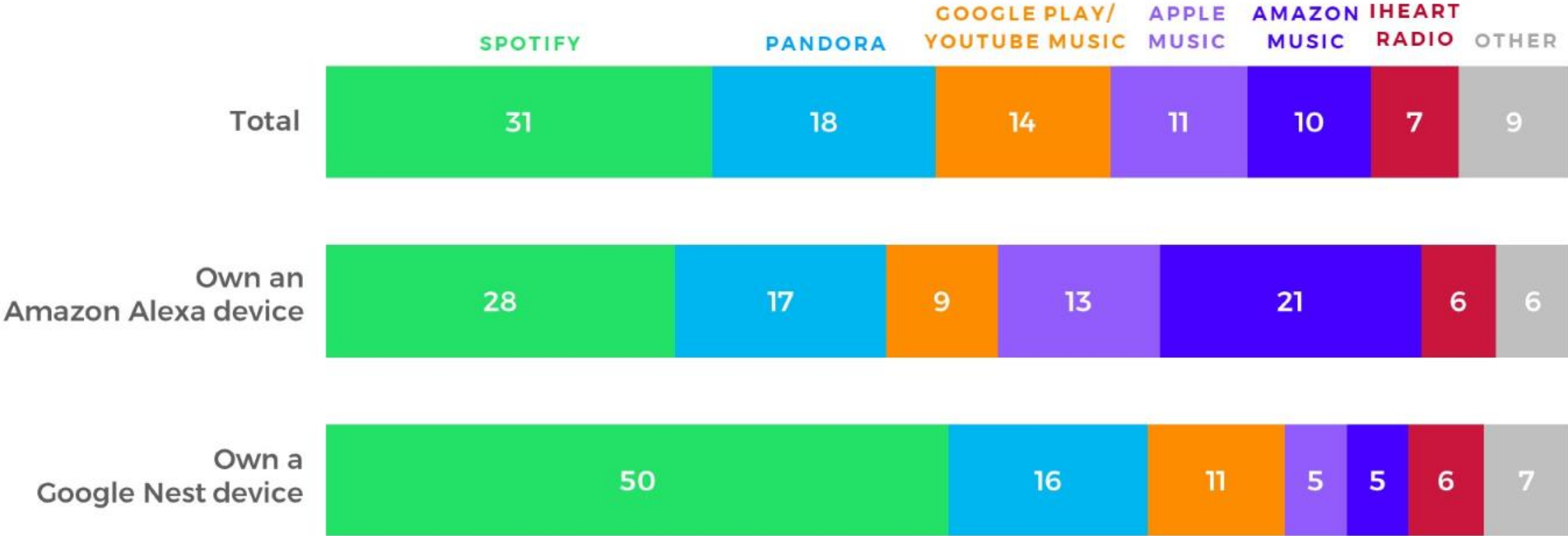
Online Audio Brand Used Most Often

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



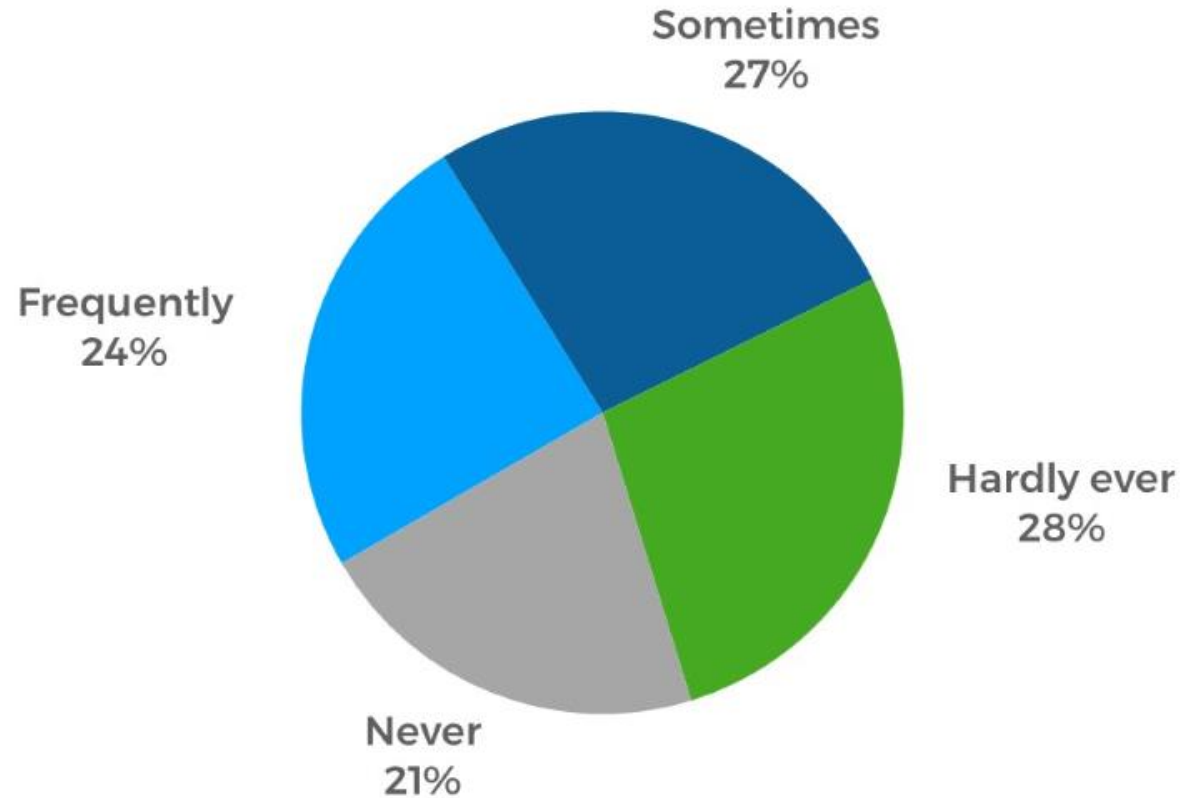
Online Audio Brand Used Most Often

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



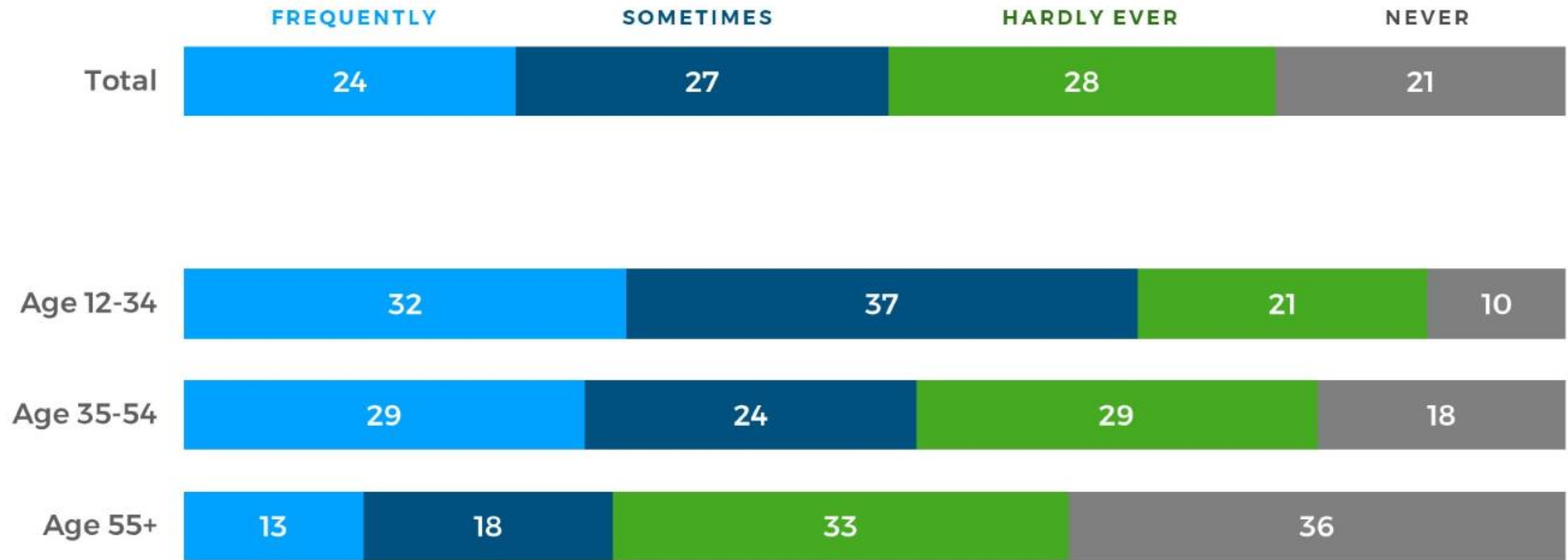
Frequency of Listening to Audio with Other People

TOTAL U.S. POPULATION 12+



Frequency of Listening to Audio with Other People

TOTAL U.S. POPULATION 12+





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In-Car Media



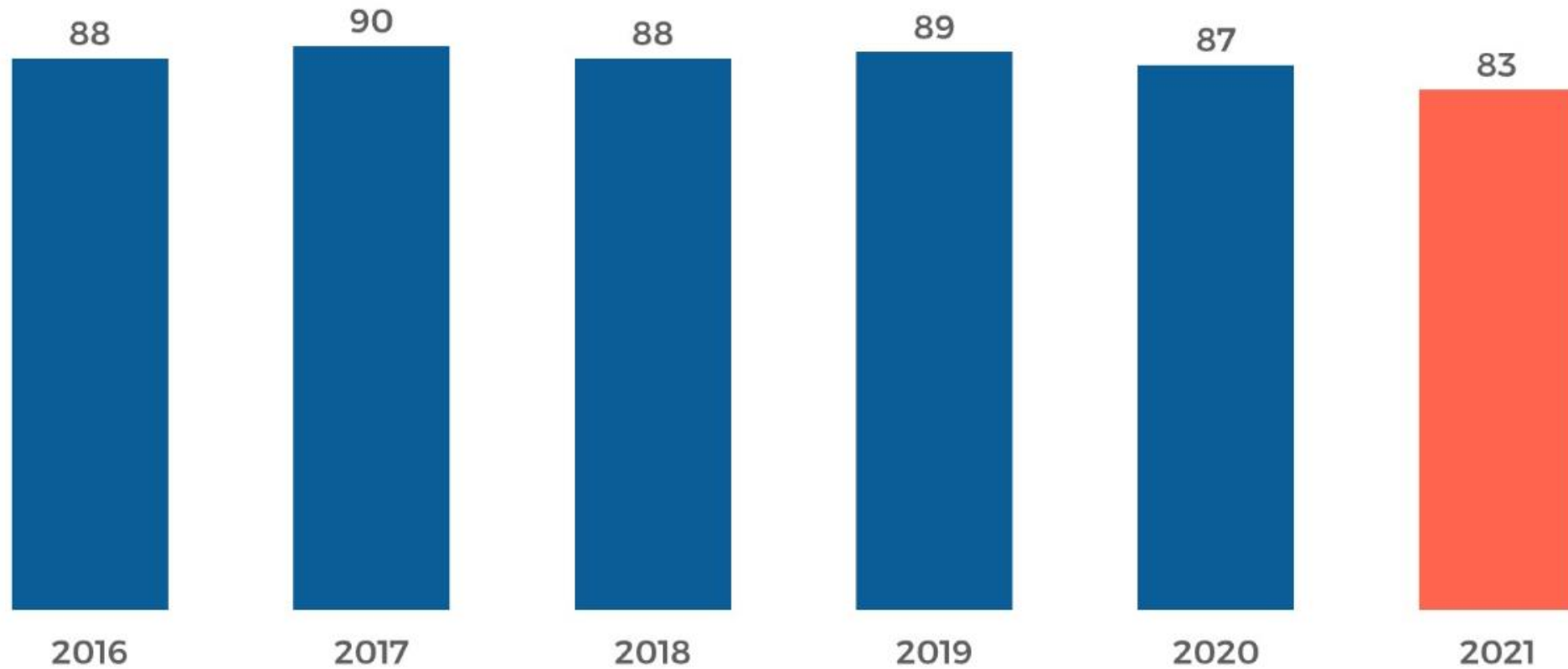
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Driven/Ridden in Car in Last Month

BASE: U.S. AGE 18+

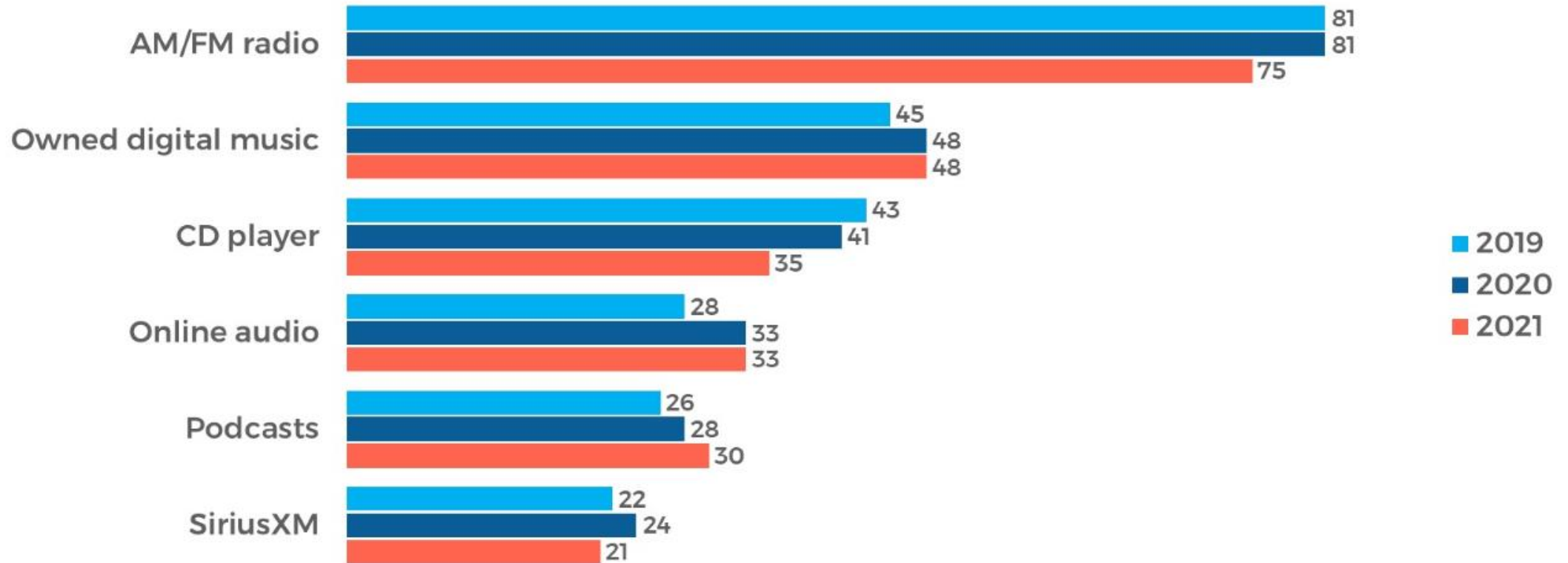
% DRIVING OR RIDING IN CAR/VEHICLE IN LAST MONTH



Audio Sources Currently Ever Used in Car

BASE: U.S. AGE 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 83%

% USING AUDIO SOURCE IN CAR



In-Dash Information and Entertainment Systems

BASE: U.S. AGE 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 83%

% OWNING IN-DASH INFORMATION AND ENTERTAINMENT SYSTEM IN CAR



Integrated Mobile Operating Systems in Primary Vehicle

BASE: U.S. AGE 18+, DRIVEN/RIDDEN IN CAR IN LAST MONTH, 83%

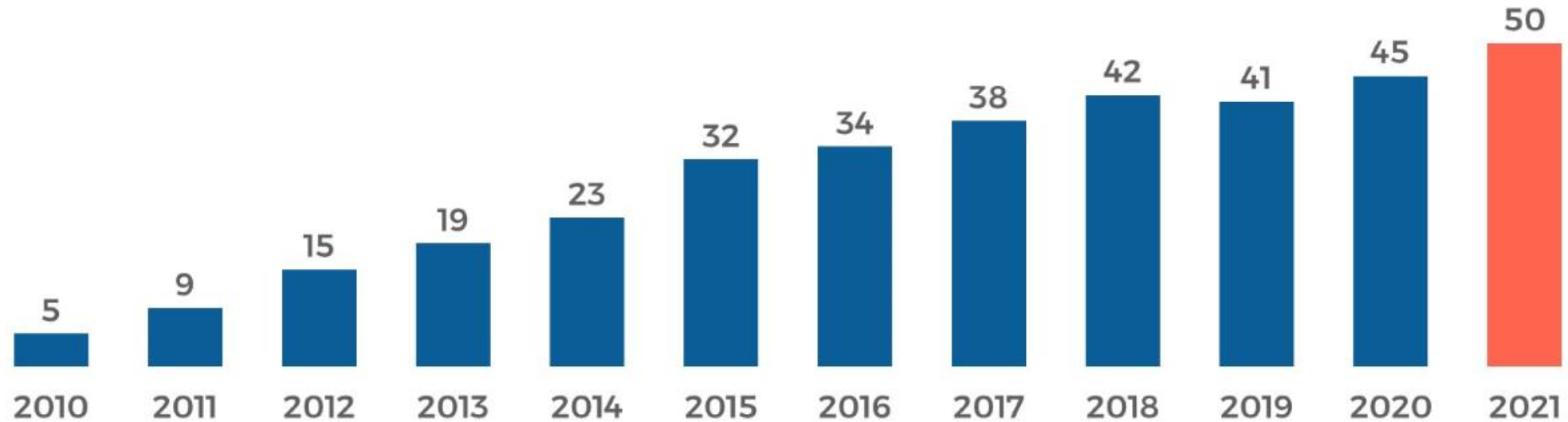
% HAVE SYSTEM IN PRIMARY VEHICLE



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



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Podcasting



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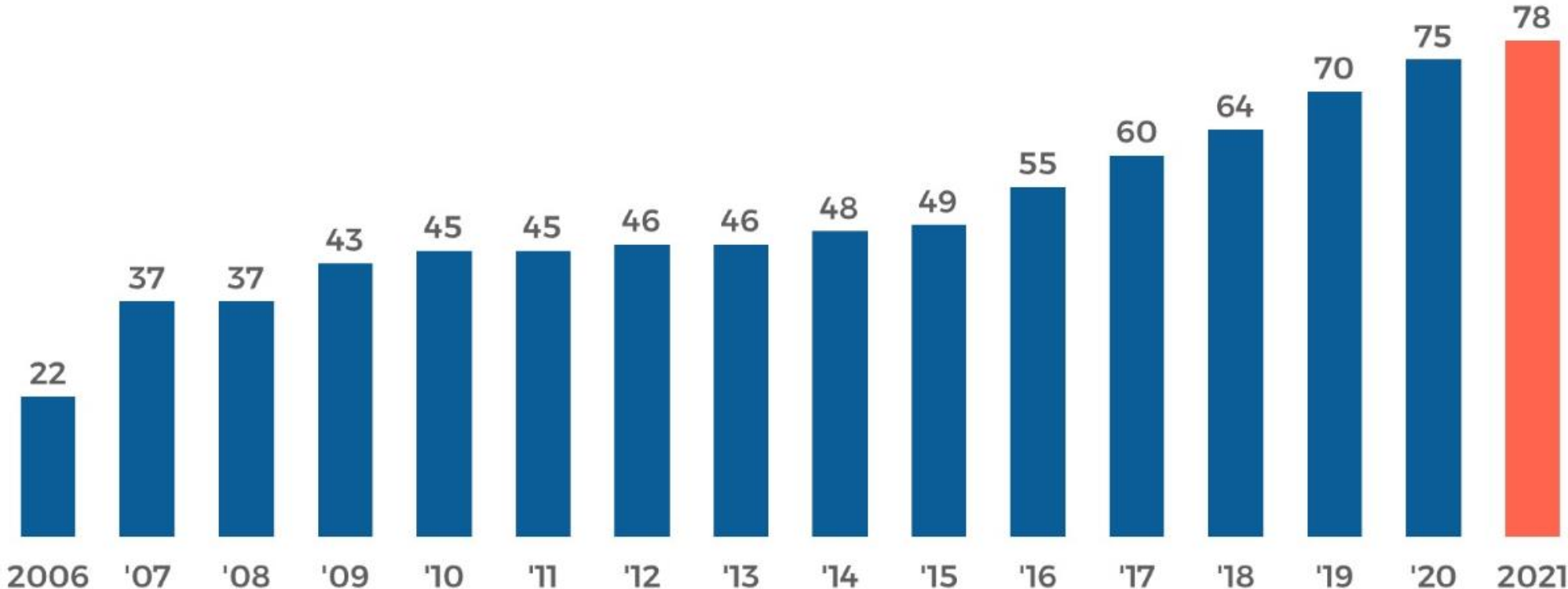
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Podcasting Familiarity

TOTAL U.S. POPULATION 12+

% FAMILIAR WITH PODCASTING

Estimated
222 Million

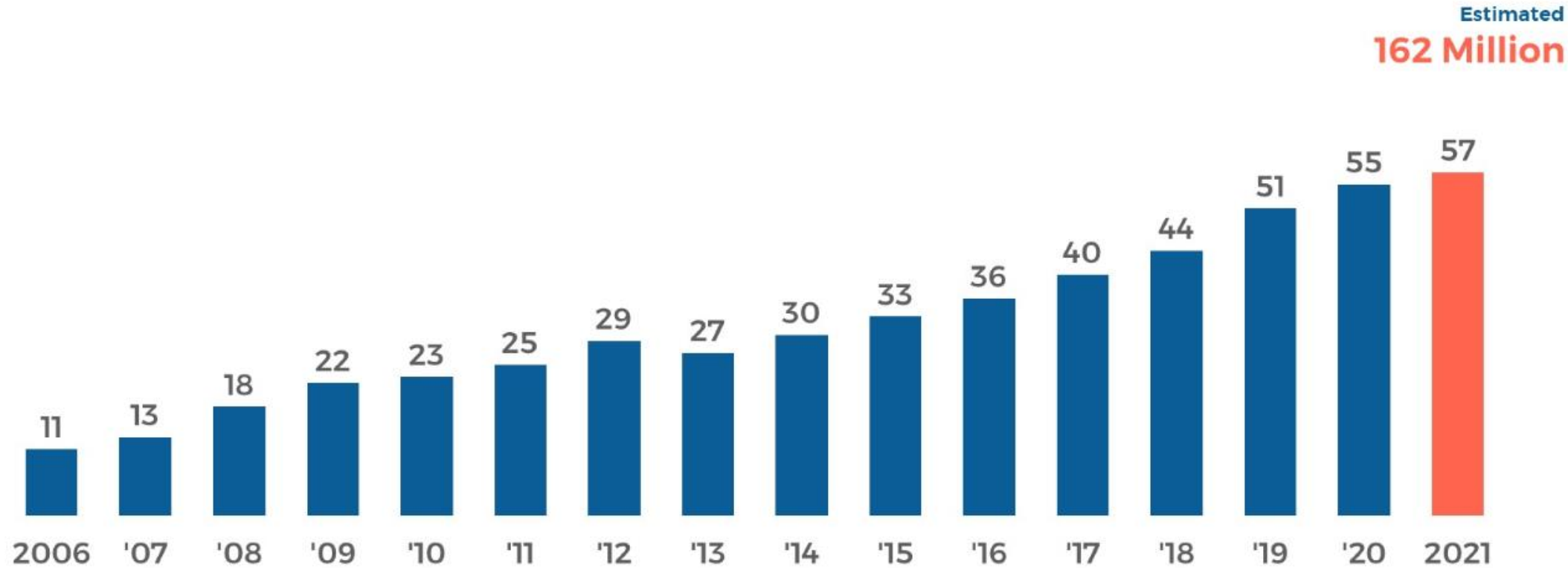


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Podcasting Listening

TOTAL U.S. POPULATION 12+

% EVER LISTENED TO A PODCAST

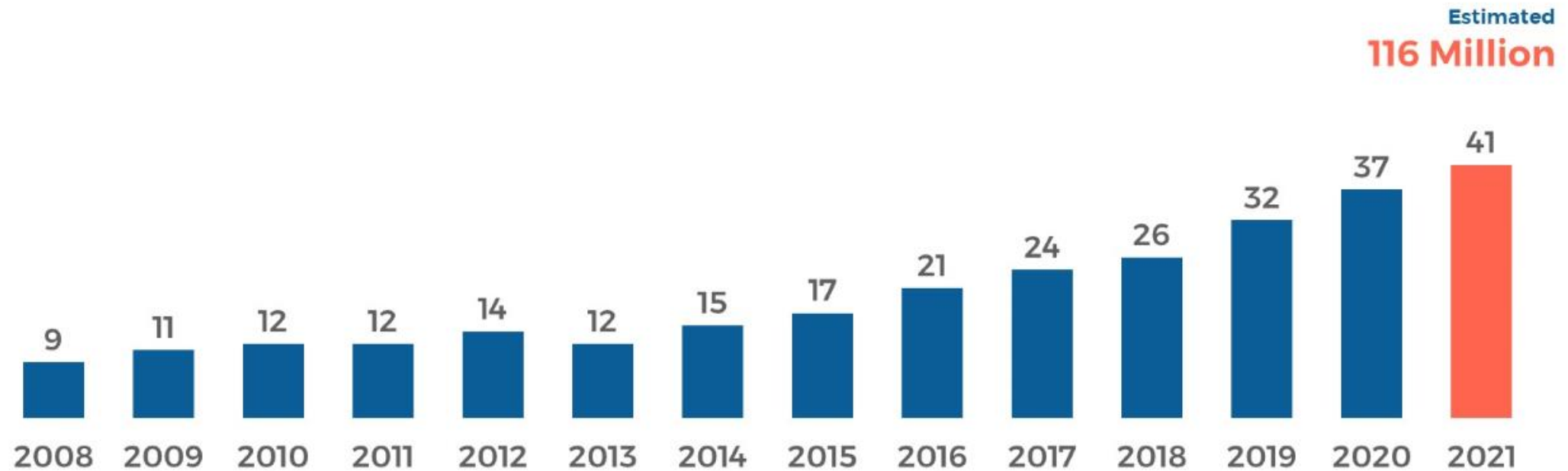


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Monthly Podcast Listening

TOTAL U.S. POPULATION 12+

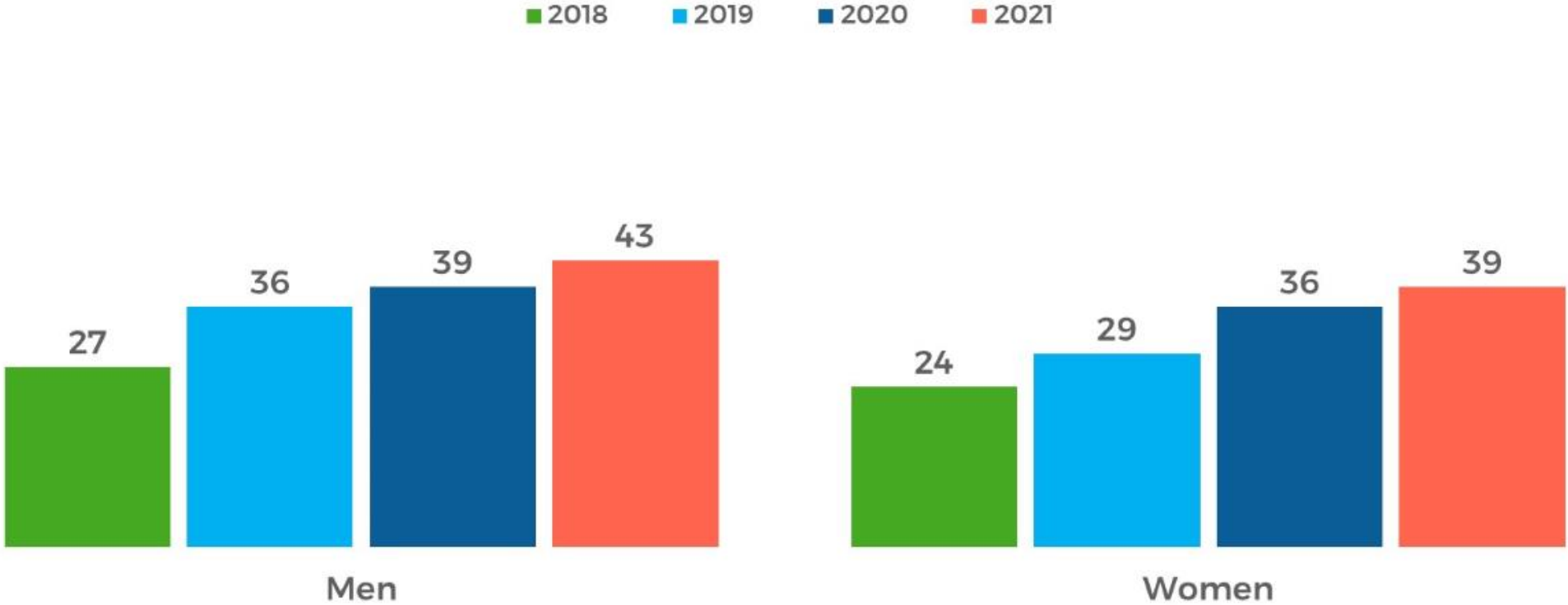
% LISTENED TO A PODCAST IN LAST MONTH



Monthly Podcast Listening

U.S. POPULATION

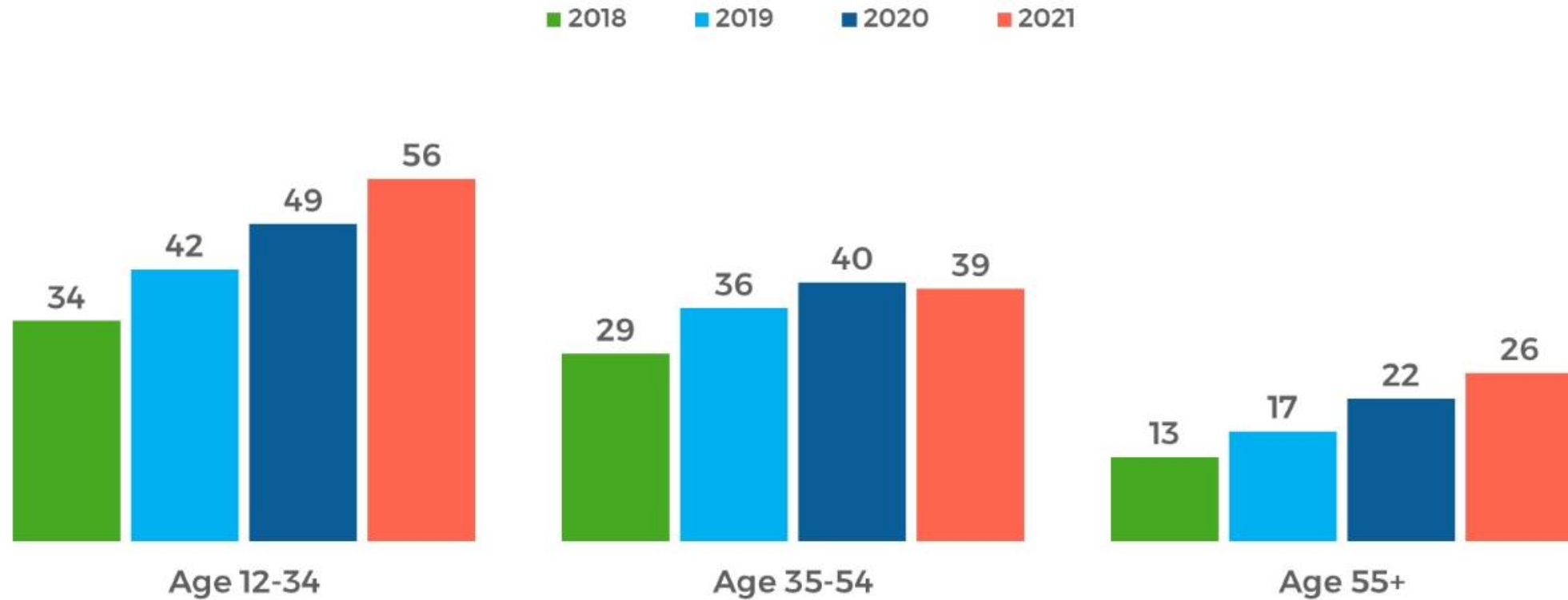
96 LISTENED TO A PODCAST IN LAST MONTH



Monthly Podcast Listening

U.S. POPULATION

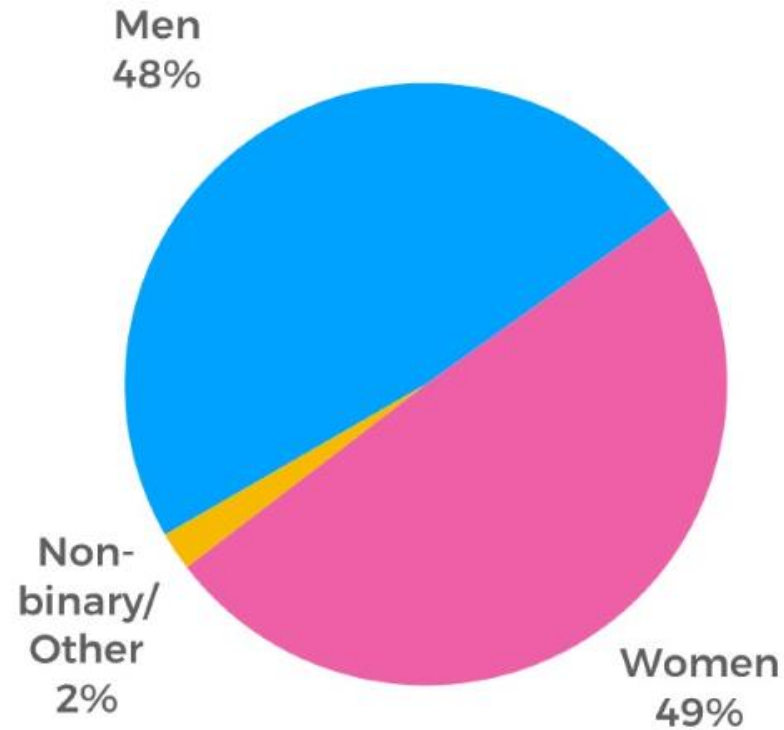
9% LISTENED TO A PODCAST IN LAST MONTH



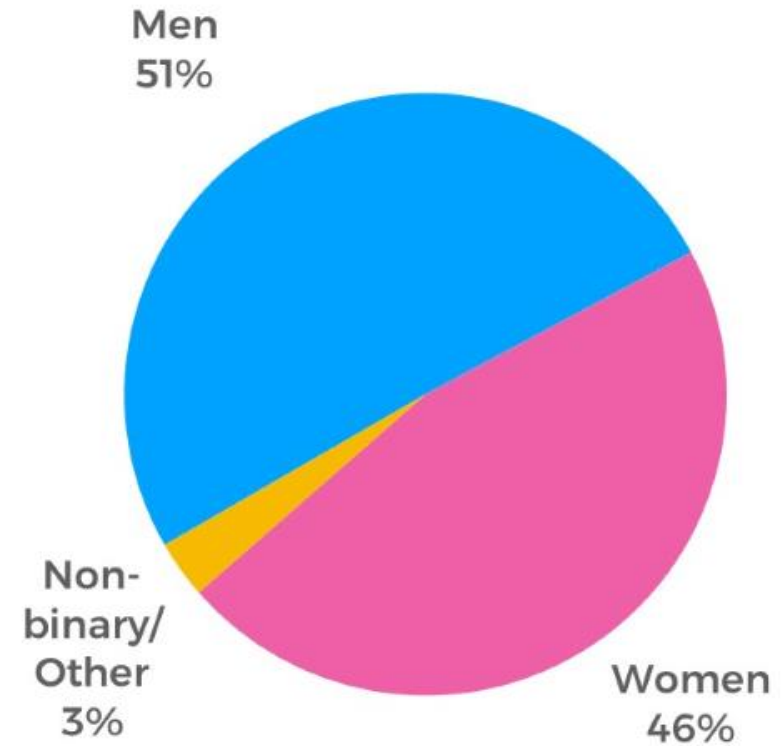
Gender of Monthly Podcast Listeners

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

U.S. POPULATION 12+



MONTHLY PODCAST CONSUMERS 12+



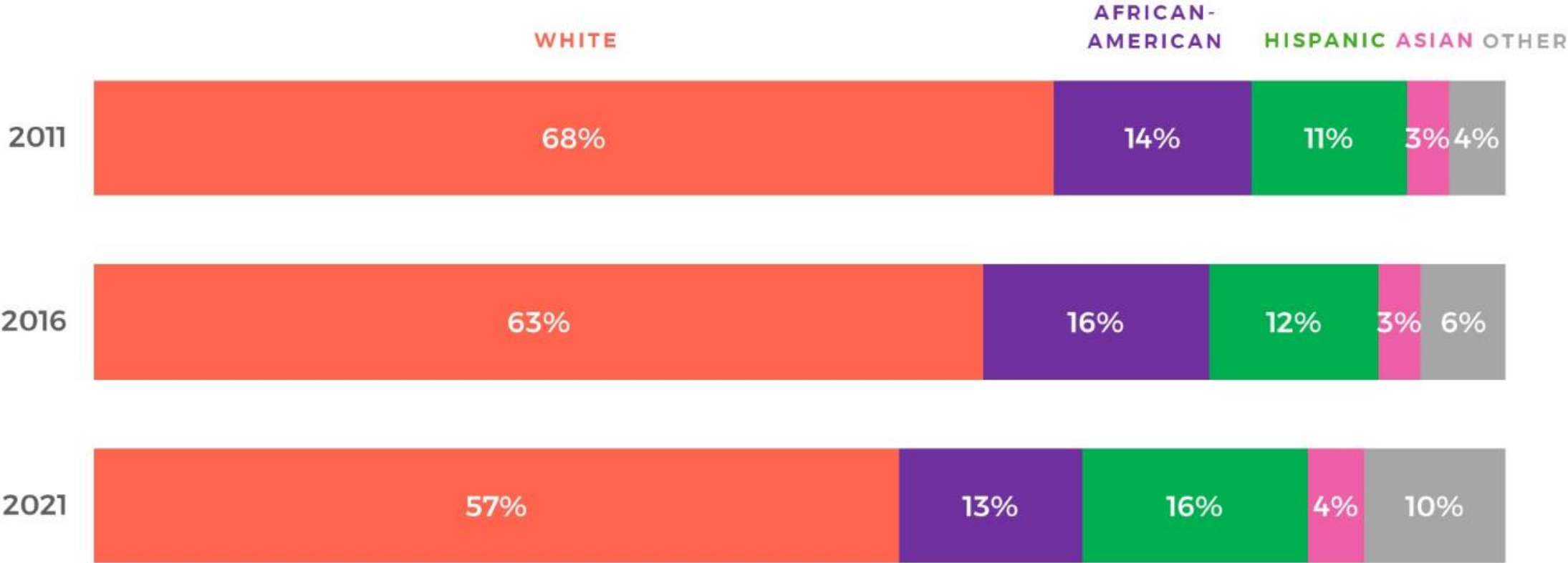
Age of Monthly Podcast Listeners

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



Ethnicity of Monthly Podcast Listeners

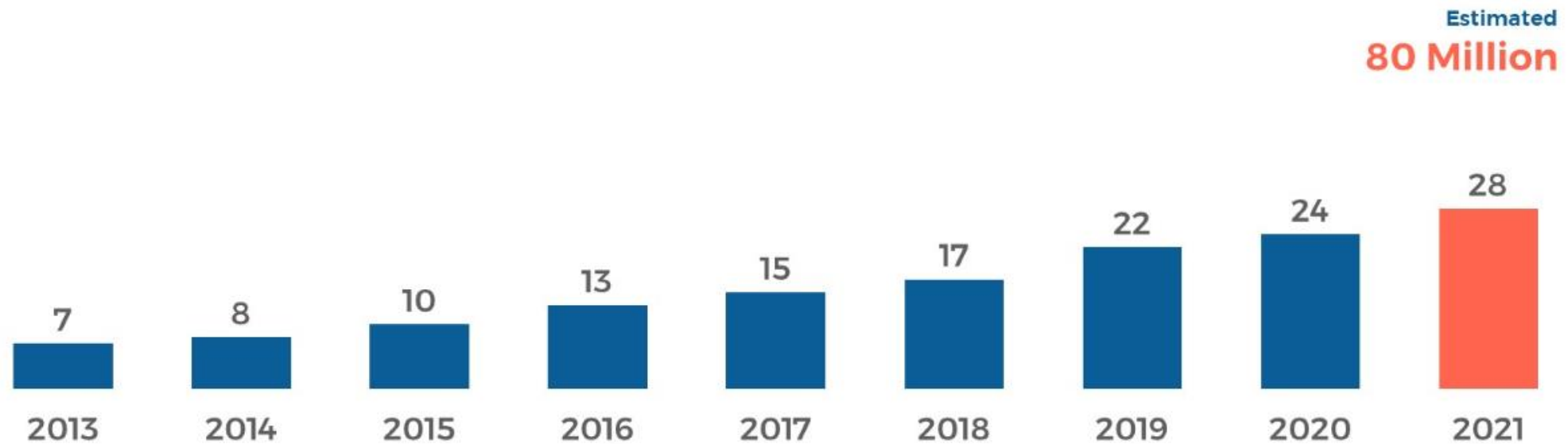
BASE: U.S. AGE 12+ AND LISTENED TO PODCAST IN LAST MONTH



Weekly Podcast Listening

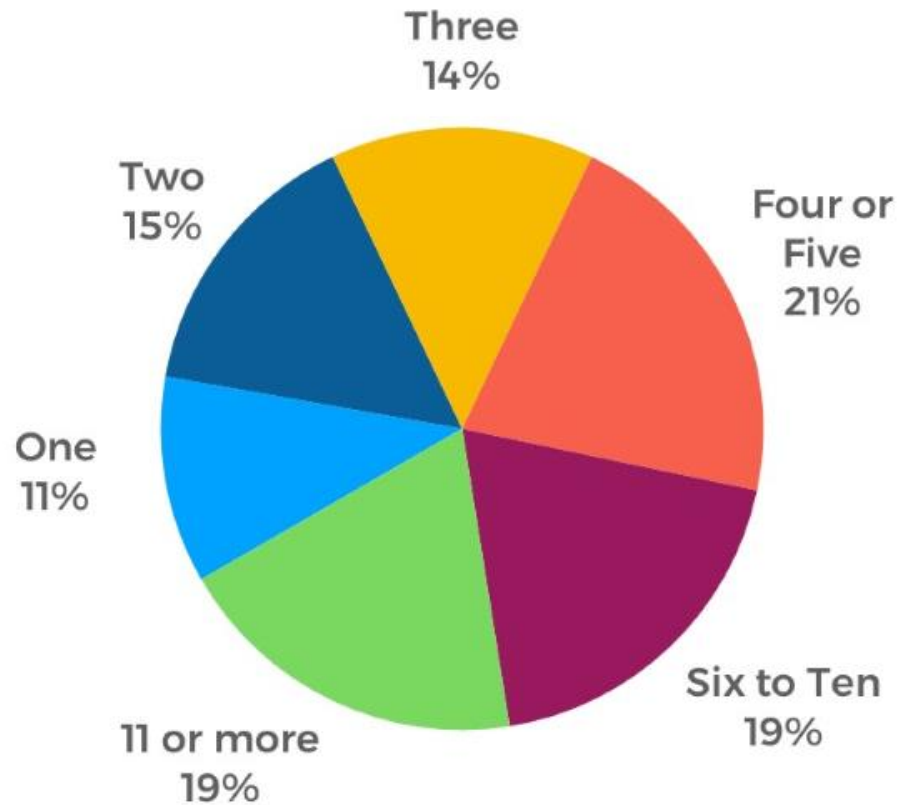
TOTAL U.S. POPULATION 12+

96 LISTENED TO A PODCAST IN LAST WEEK



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
Eight podcasts
in the last week

U.S. weekly podcast listeners averaged

5.1 podcast shows

in the last week

Observations

Podcasting has grown significantly, especially with weekly listeners.

Observations

The demographics of podcast listeners continue to diversify. In 2021, the composition of female listeners reached an all-time high.

While podcast consumers continue to be mostly White, the medium exhibited very strong gains with Hispanic/Latino listeners and with Black listeners and now very nearly reflects the diversity of the U.S. population.

Observations

Tablets and watches have clearly plateaued--the smartphone continues to grow and remains the most important device for media consumption

Observations

Smart Speaker ownership grew more than 22% year-over-year, and the number of speaker per home also grew. Pandemic-related restrictions may have helped to fuel this growth, with nearly half of those who primarily work from home now owning a smart speaker.

Observations

While most social media platforms exhibited modest or no growth, TikTok surged, especially among 12-34 year-olds.

For the first time in Infinite Dial history, Facebook is no longer indicated as the most-used platform by a majority of social media users, driven mainly by 12-34 preference for Instagram, TikTok, and Snapchat.

Observations

One-in-five Americans 12+ have now watched a live stream of a video game, and 10% have actually broadcast their own games.

Observations

Weekly online audio listening has hit an all-time high, with an increase in reach also accompanied by a one-hour rise in weekly time spent listening over the previous year.

Observations

Spotify has solidified its spot as the largest single-source for online audio, and has played a role in the growth of podcasting (especially with younger listeners).

Observations

The percentage of Americans who have driven or ridden in a car in the last month decreased on account of pandemic-related disruptions, from 88% in 2020 to 83% this year.



Coming Soon

The Infinite Dial – Australia

Moms and Media

The Infinite Dial – Canada

Details to follow at www.edisonresearch.com

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