



The Infinite Dial 2020

#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 2020, Edison Research conducted a national telephone survey of 1502 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



Media & Technology



#InfiniteDial

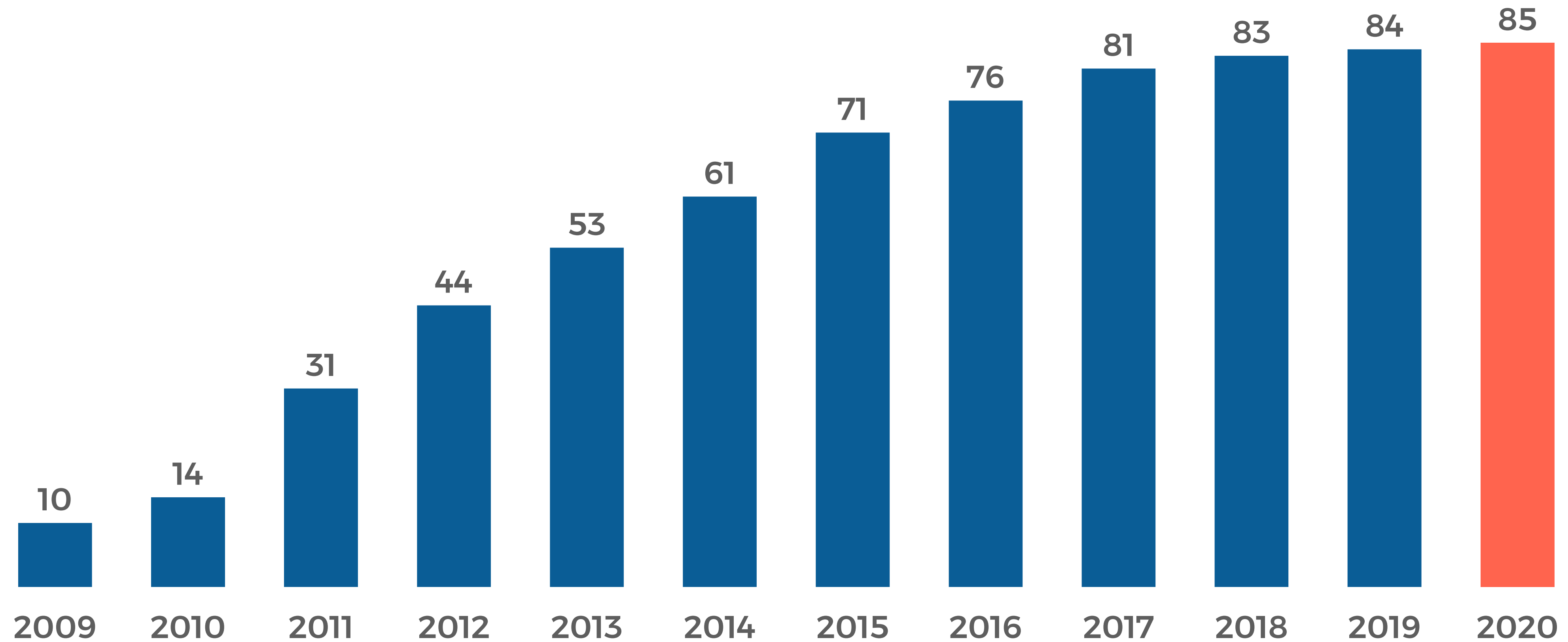
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Smartphone Ownership

TOTAL U.S. POPULATION 12+

% OWNING A SMARTPHONE

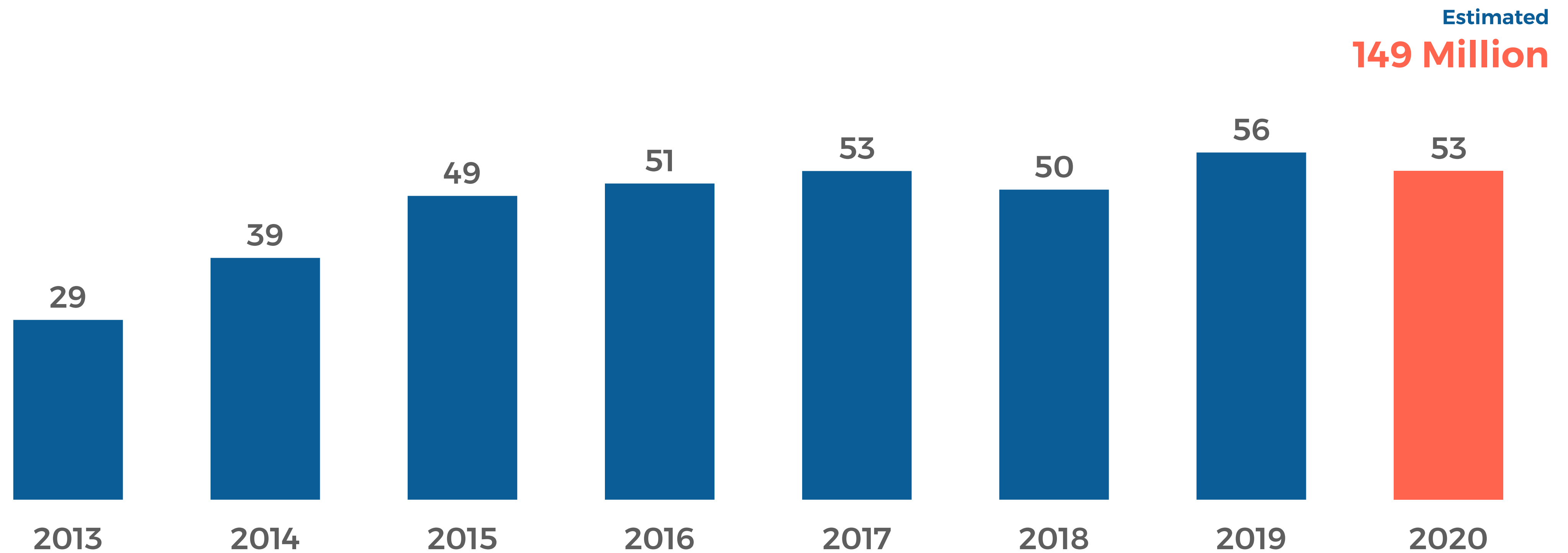
Estimated
240 Million



Tablet Ownership

TOTAL U.S. POPULATION 12+

% OWNING A TABLET



Smartwatch Ownership

TOTAL U.S. POPULATION 12+

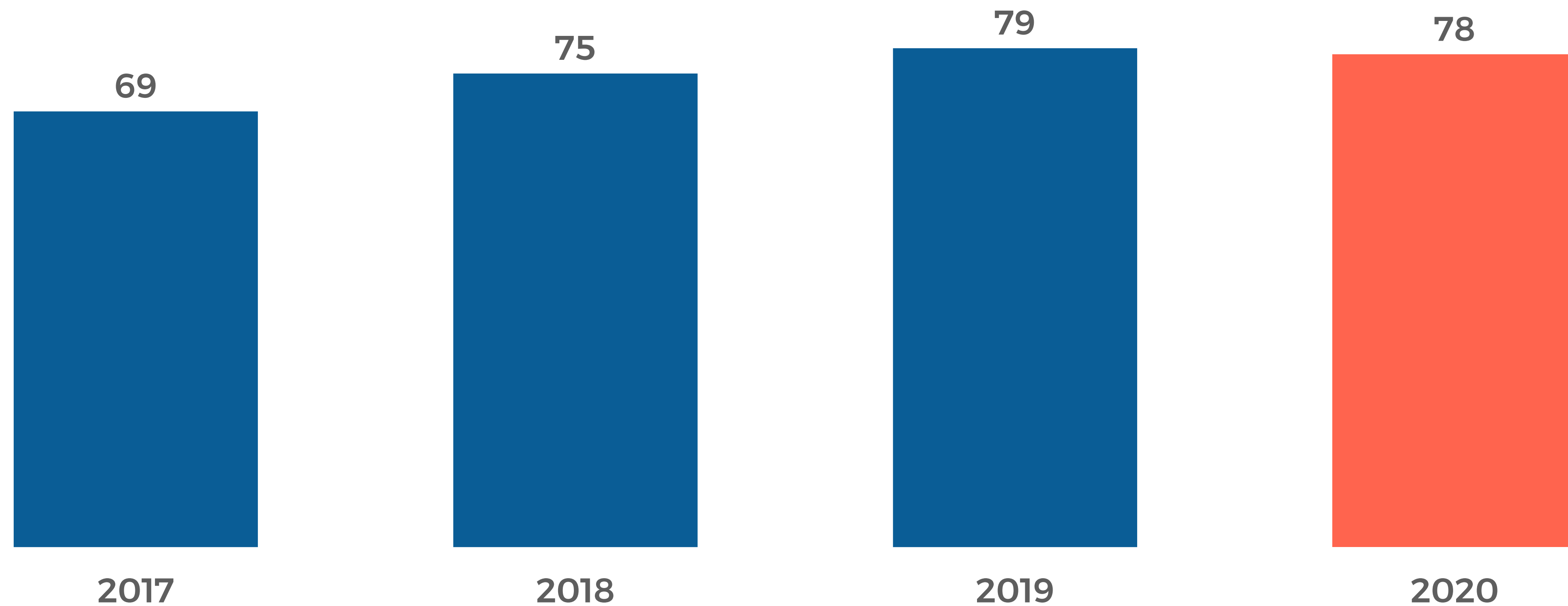
% OWNING A SMARTWATCH



Smart Speaker Awareness

TOTAL U.S. POPULATION 12+

% AWARE OF ANY SMART SPEAKER BRAND

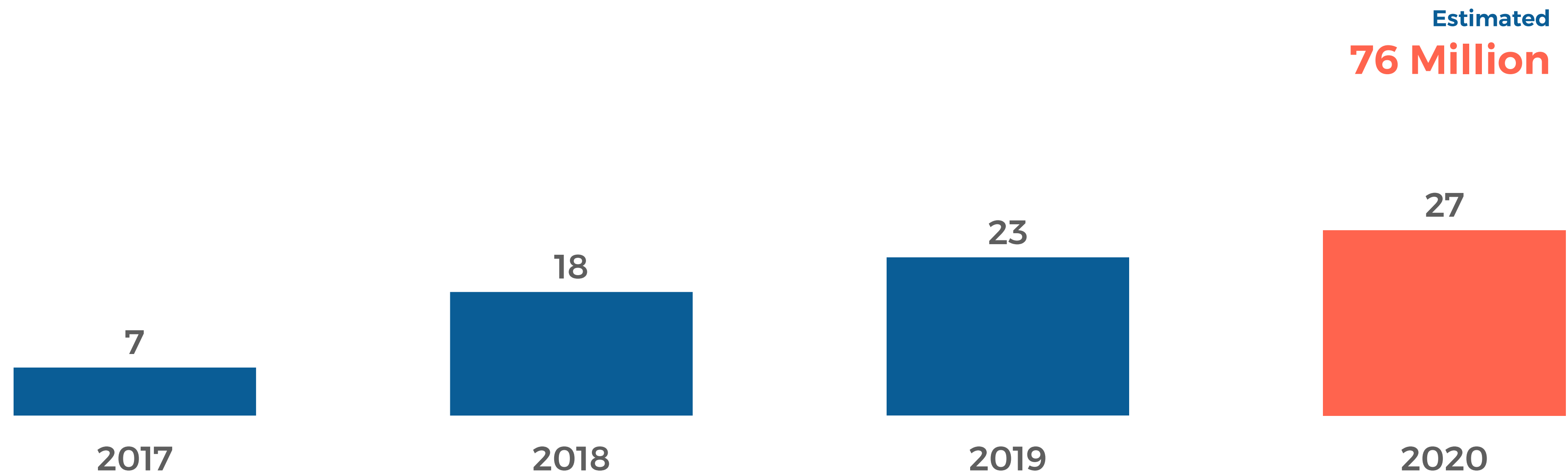


Estimated
220 Million

Smart Speaker Ownership

TOTAL U.S. POPULATION 12+

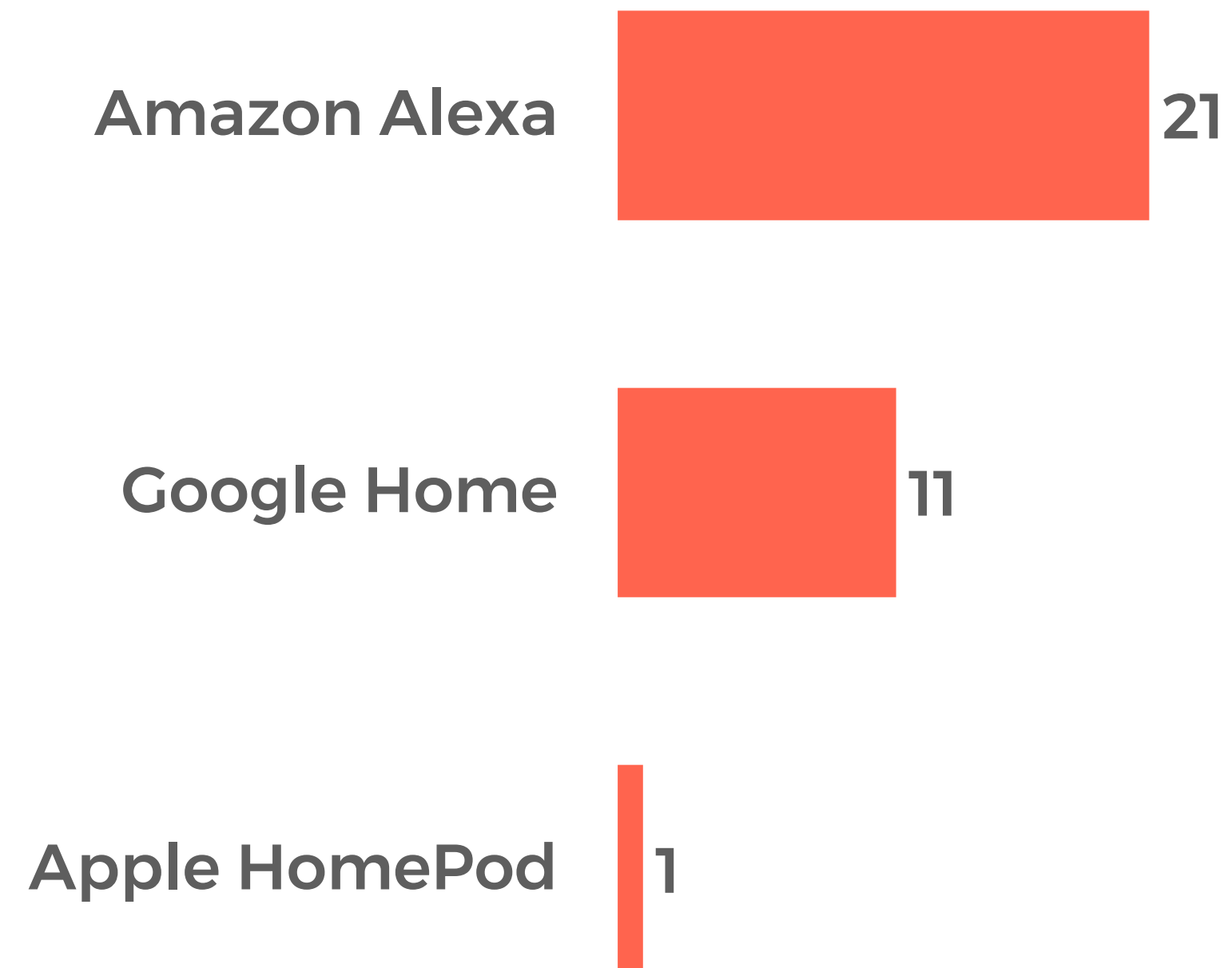
% OWNING A SMART SPEAKER



Smart Speaker Ownership

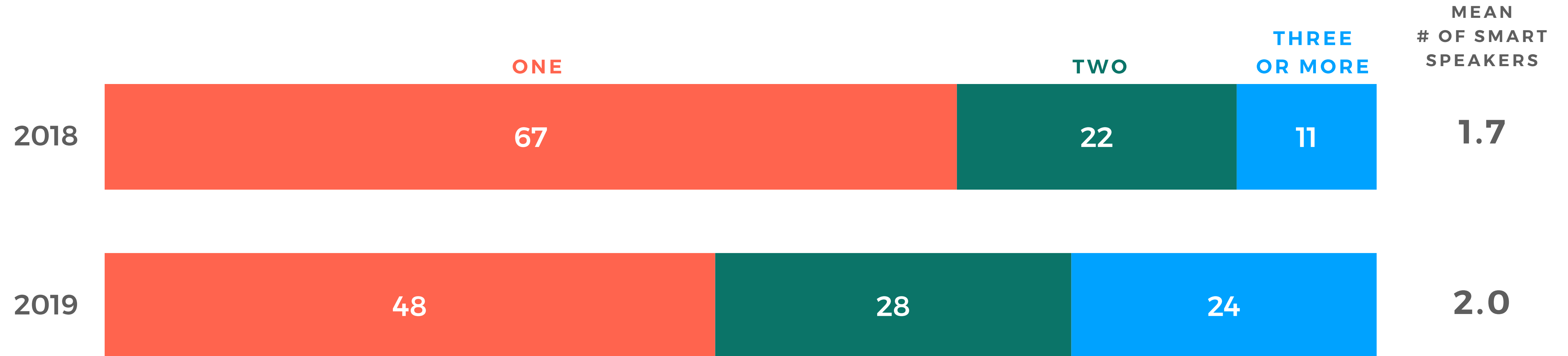
TOTAL U.S. POPULATION 12+

% OWNING SMART SPEAKER



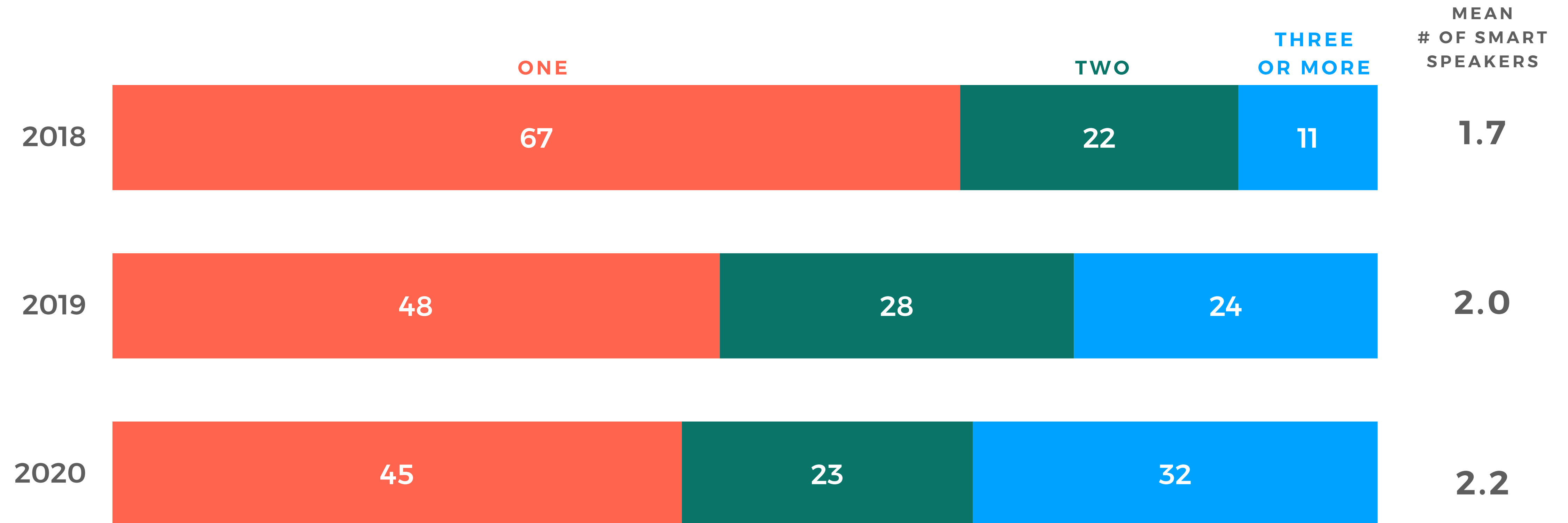
Number of Smart Speakers in Household

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



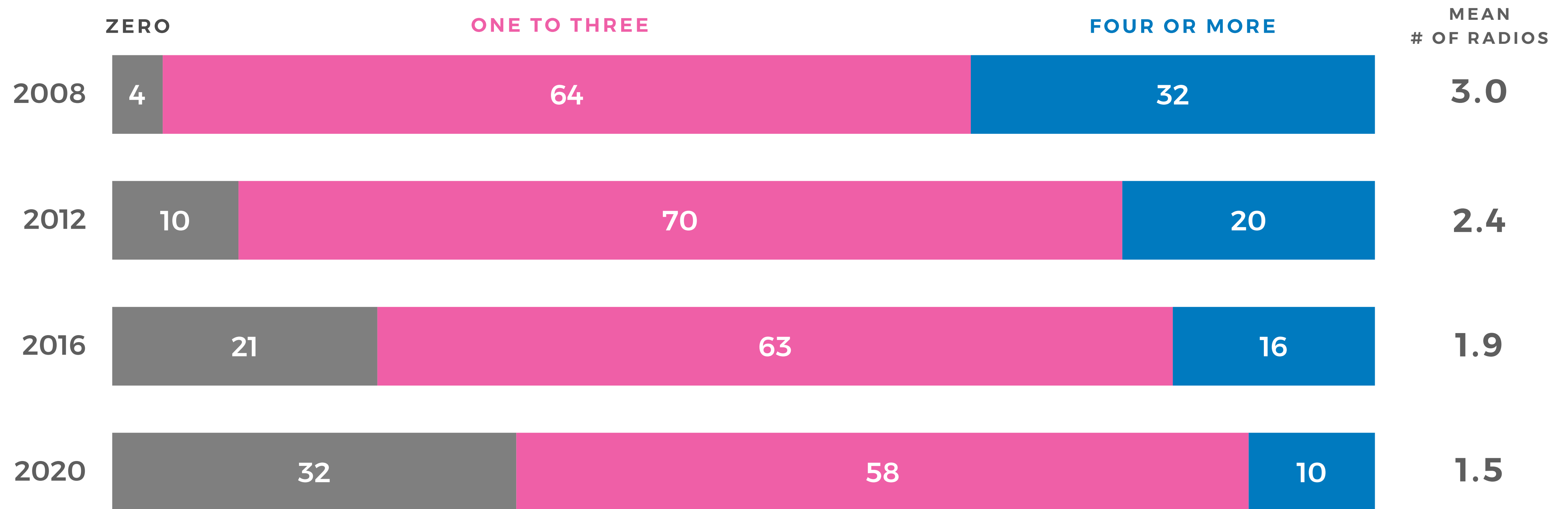
Number of Smart Speakers in Household

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



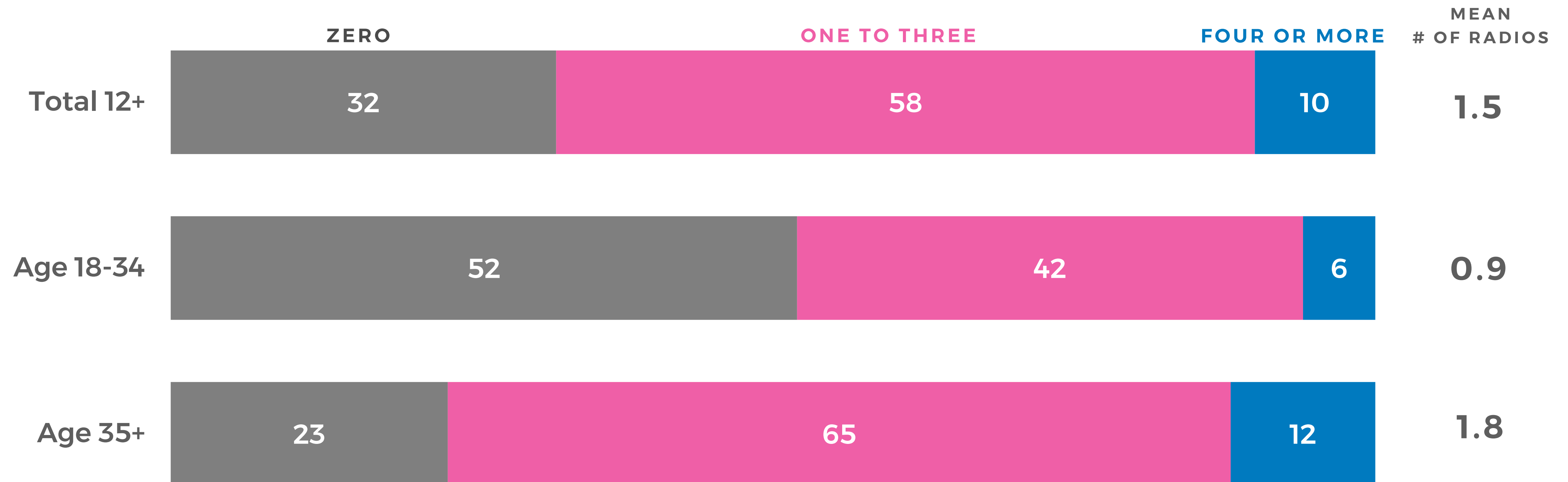
Number of Radios in Household

TOTAL U.S. POPULATION 12+



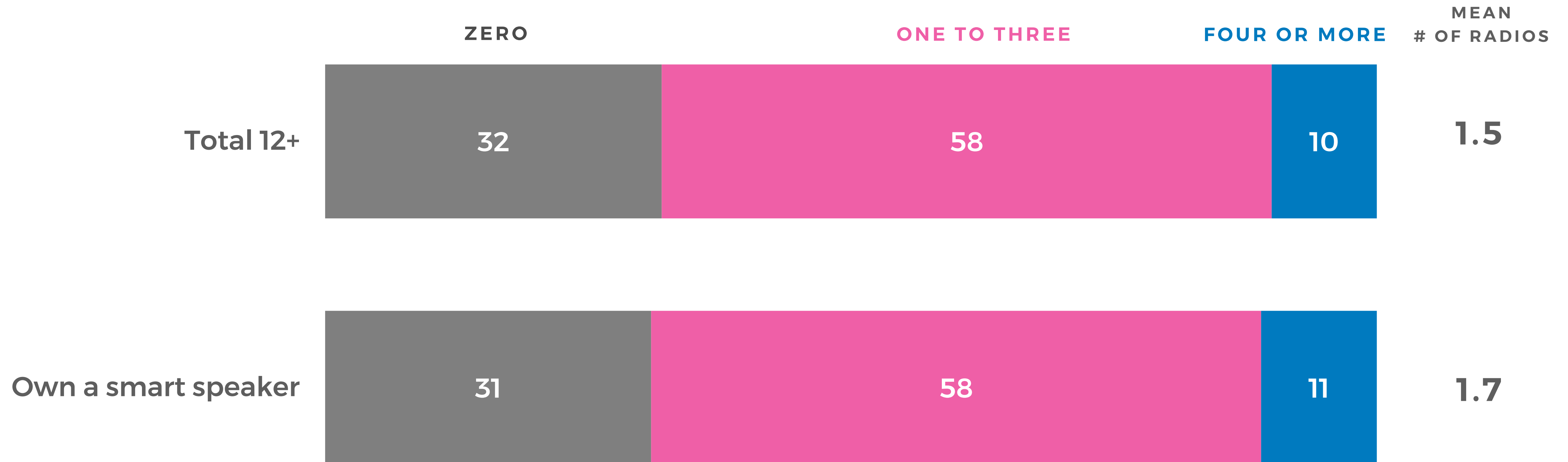
Number of Radios in Household

TOTAL U.S. POPULATION



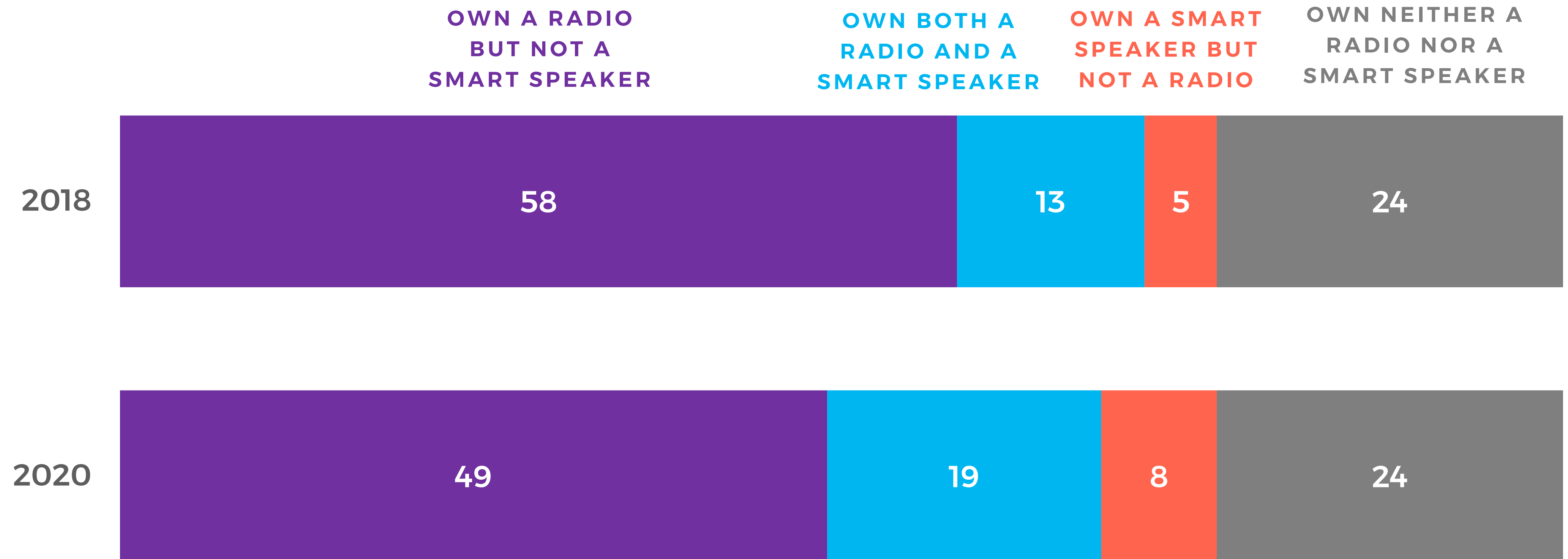
Number of Radios in Household

TOTAL U.S. POPULATION



Radio Ownership and Smart Speaker Ownership

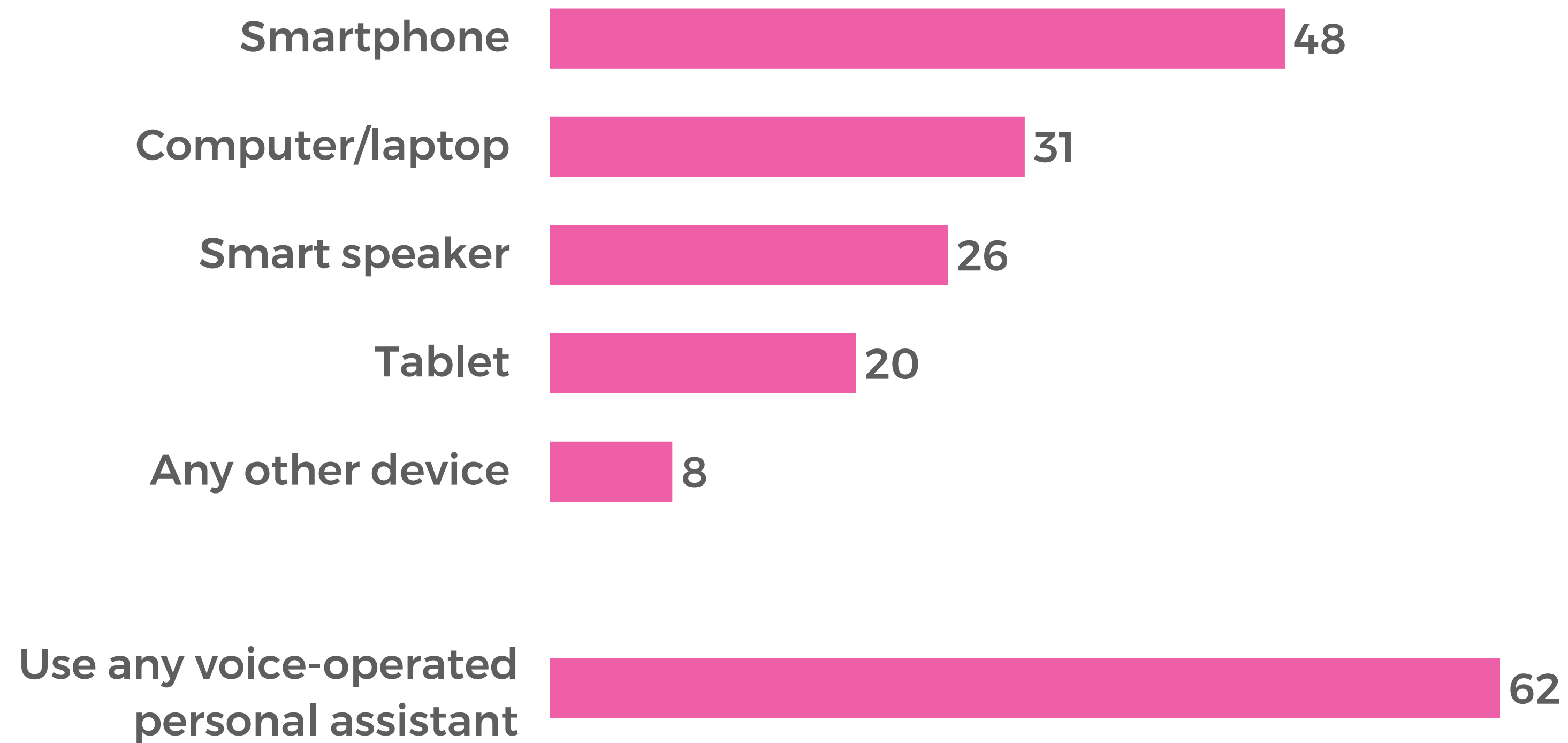
TOTAL U.S. POPULATION



Voice-Operated Personal Assistant Usage

TOTAL U.S. POPULATION 12+

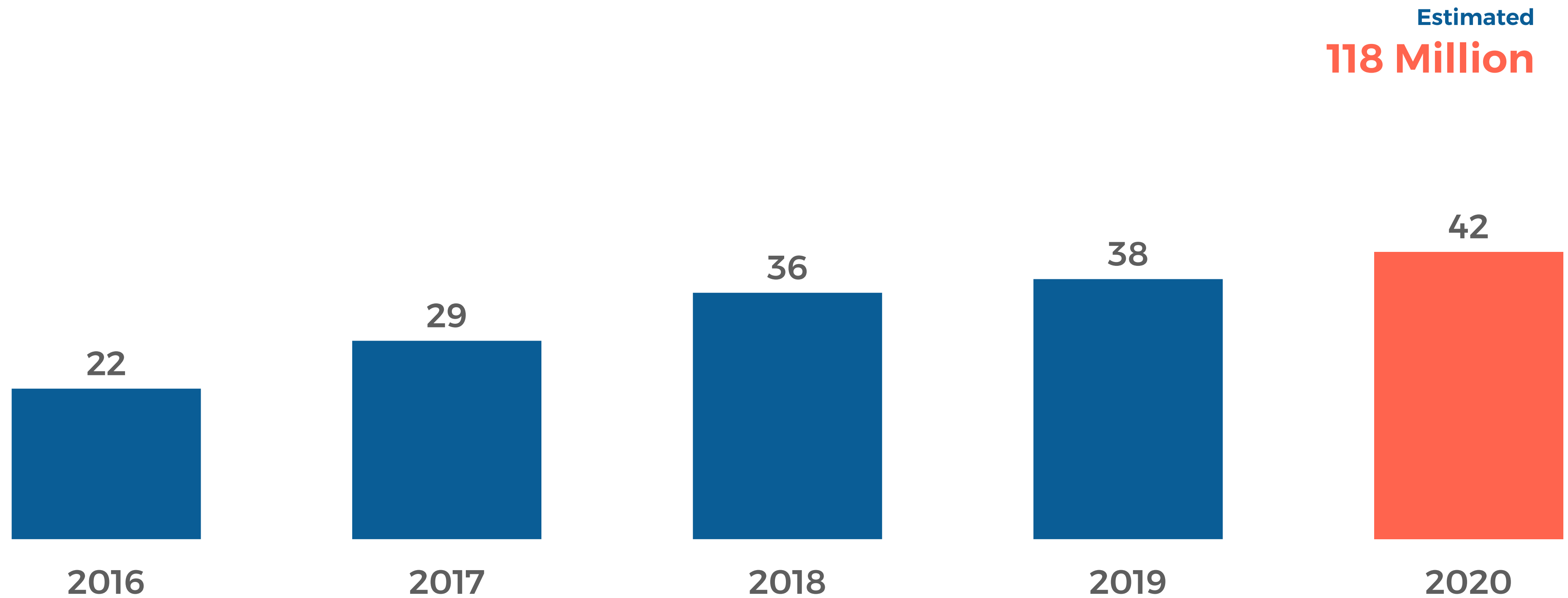
% USING VOICE-OPERATED PERSONAL ASSISTANTS ON DEVICE



Amazon Prime Subscription

TOTAL U.S. POPULATION 12+

% SUBSCRIBE TO AMAZON PRIME



 THE INFINITE DIAL® 2020

Social Media



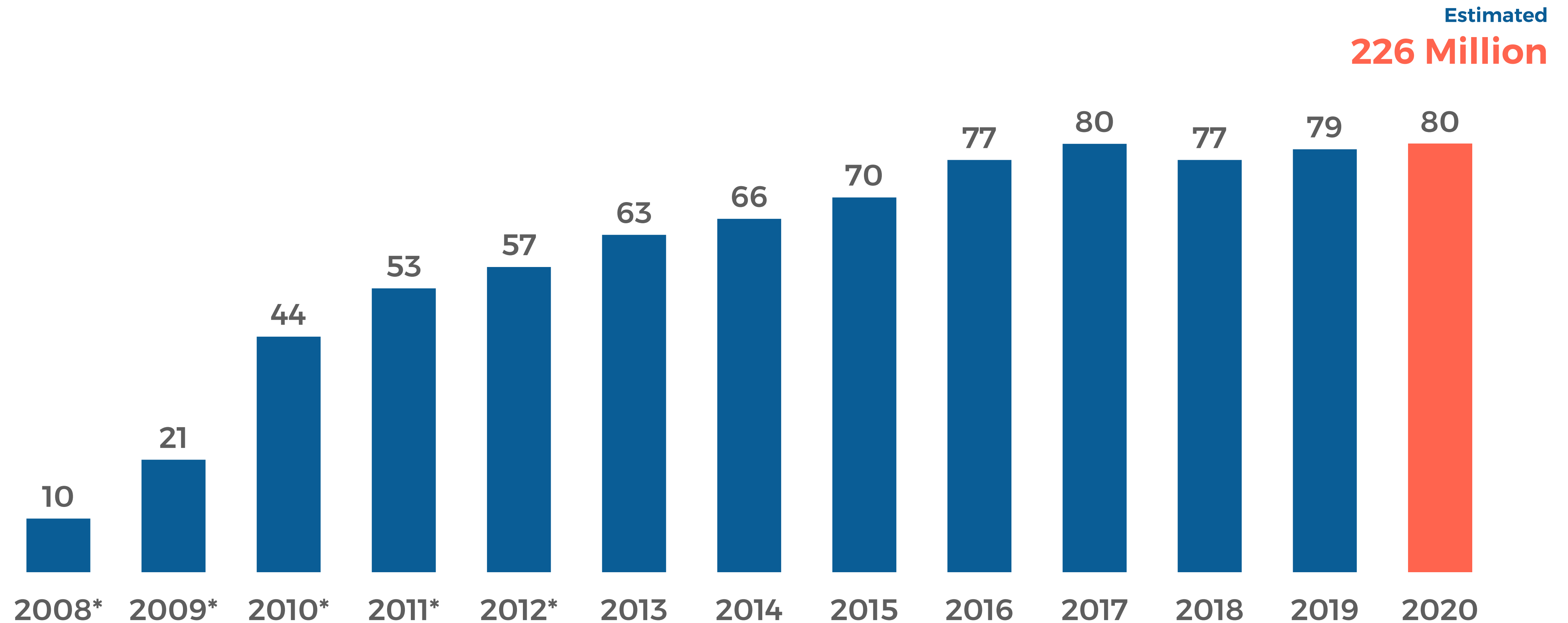
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Social Media Usage

TOTAL U.S. POPULATION 12+

% USING SOCIAL MEDIA



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



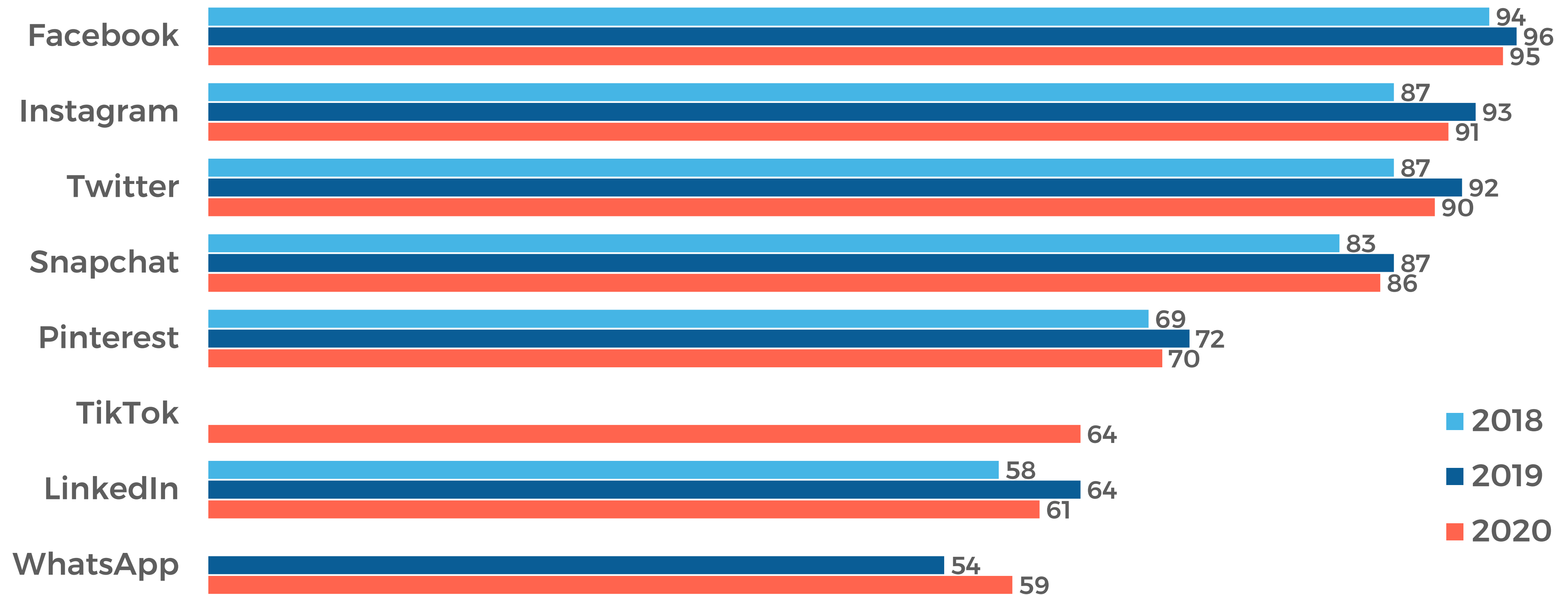
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Social Media Brand Awareness

TOTAL U.S. POPULATION 12+

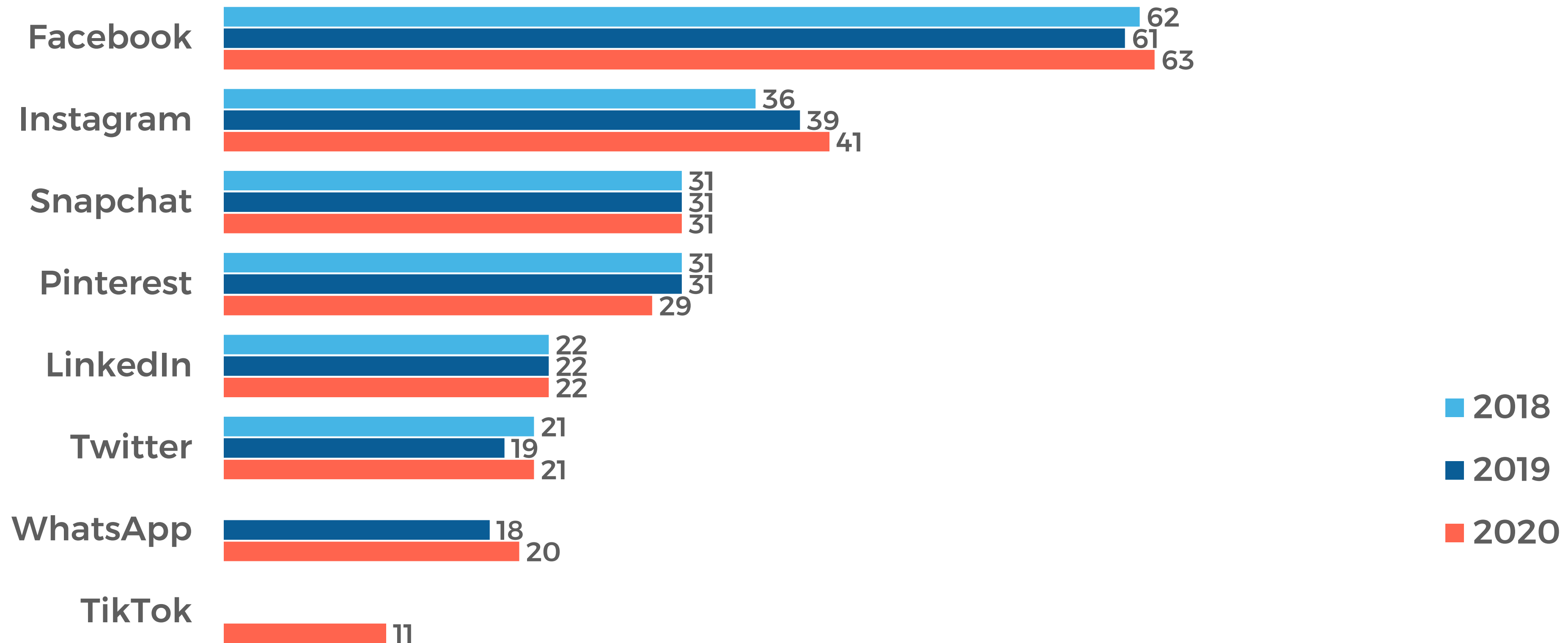
% AWARE OF SOCIAL MEDIA BRAND



Social Media Brand Usage

TOTAL U.S. POPULATION 12+

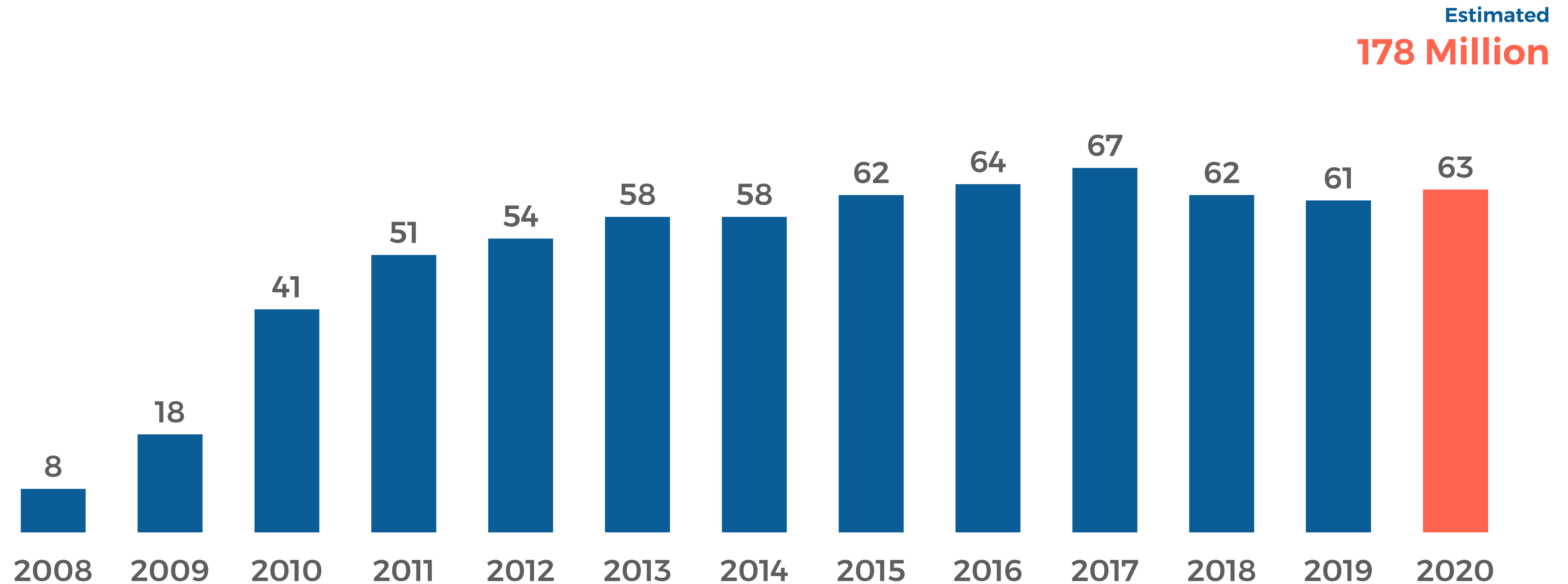
% USING SOCIAL MEDIA BRAND



Facebook Usage

TOTAL U.S. POPULATION 12+

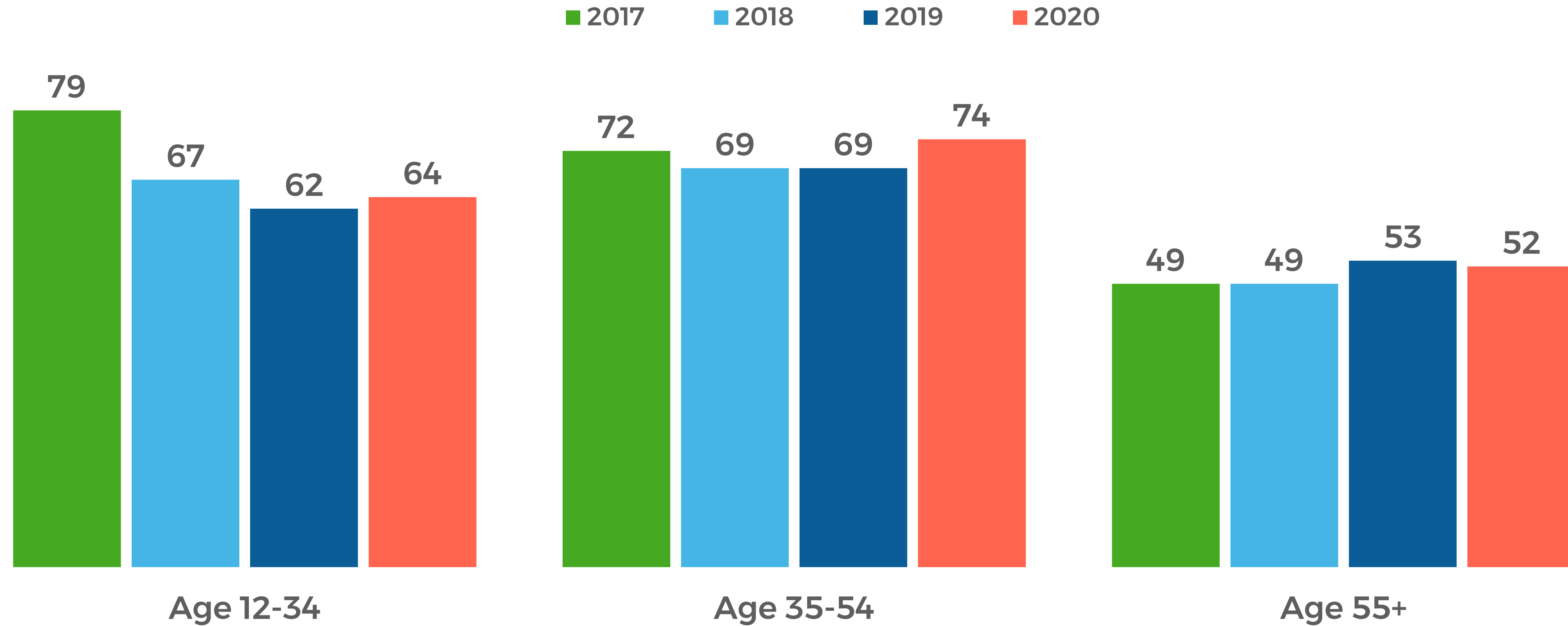
% USING FACEBOOK



Facebook Usage

U.S. POPULATION

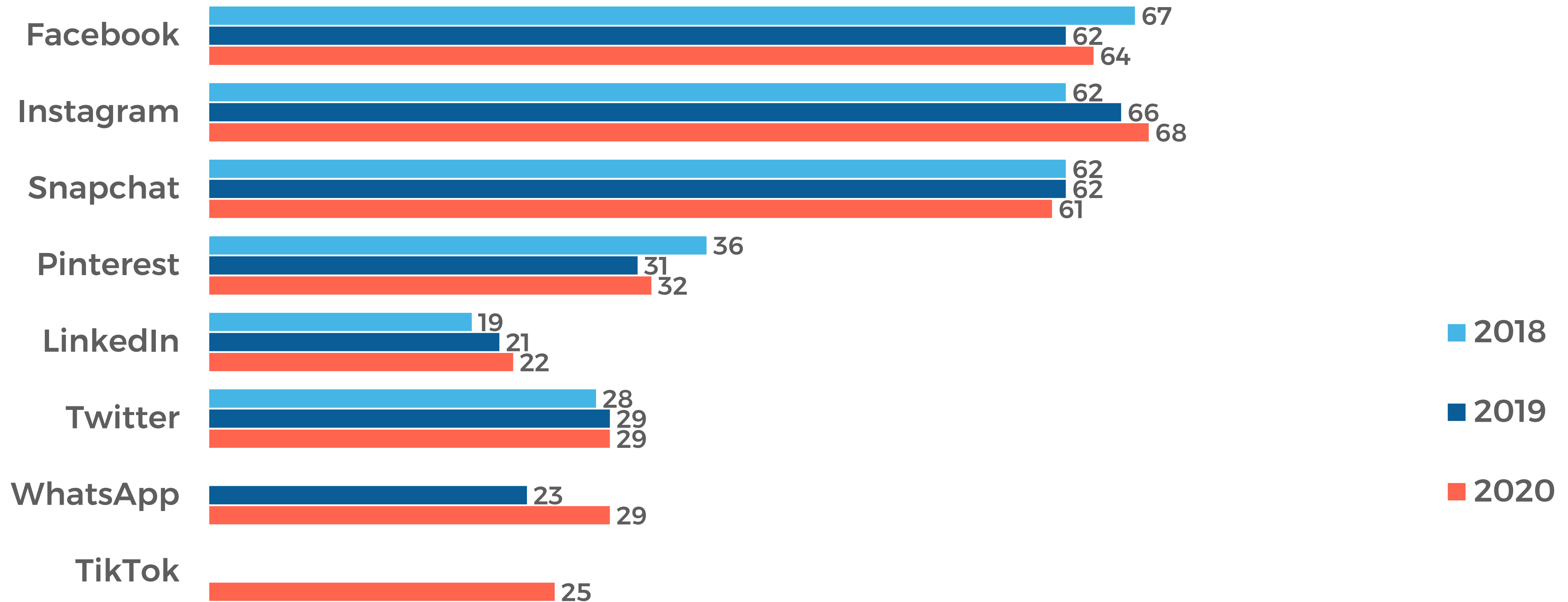
% USING FACEBOOK



Social Media Brand Usage (Age 12-34)

U.S. POPULATION

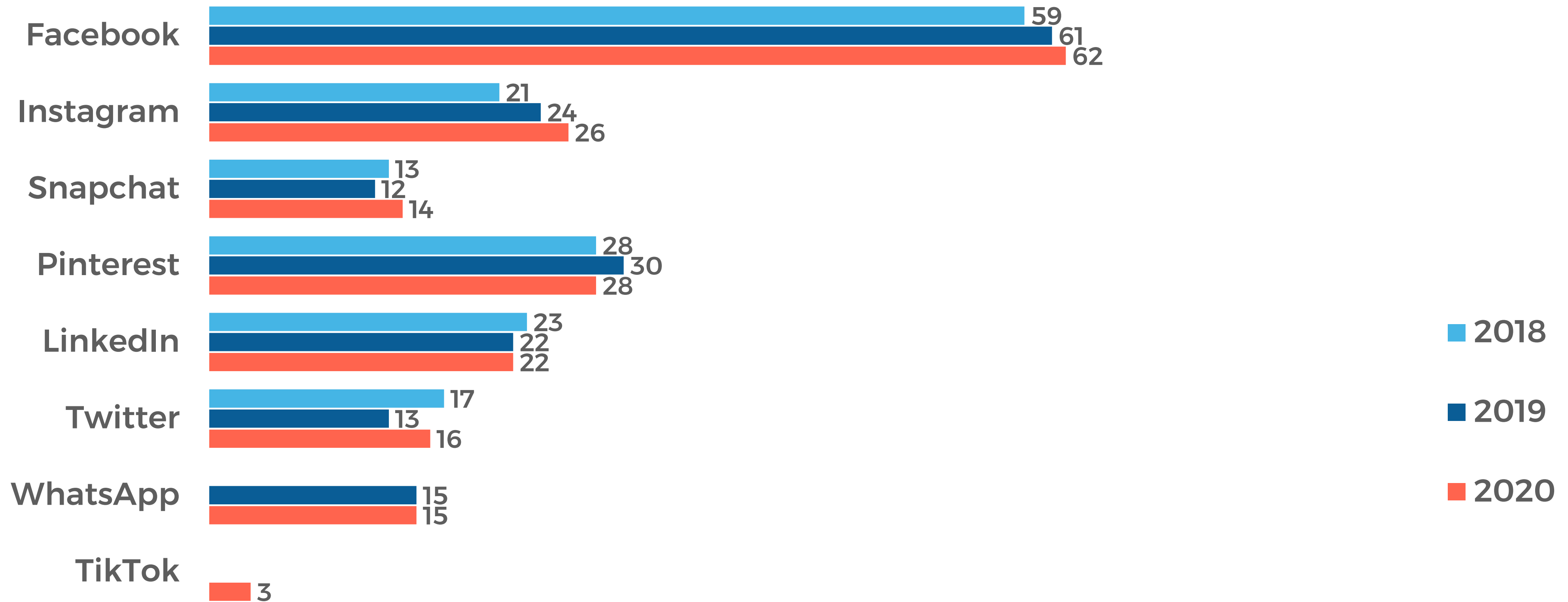
% USING SOCIAL MEDIA BRAND



Social Media Brand Usage (Age 35 and older)

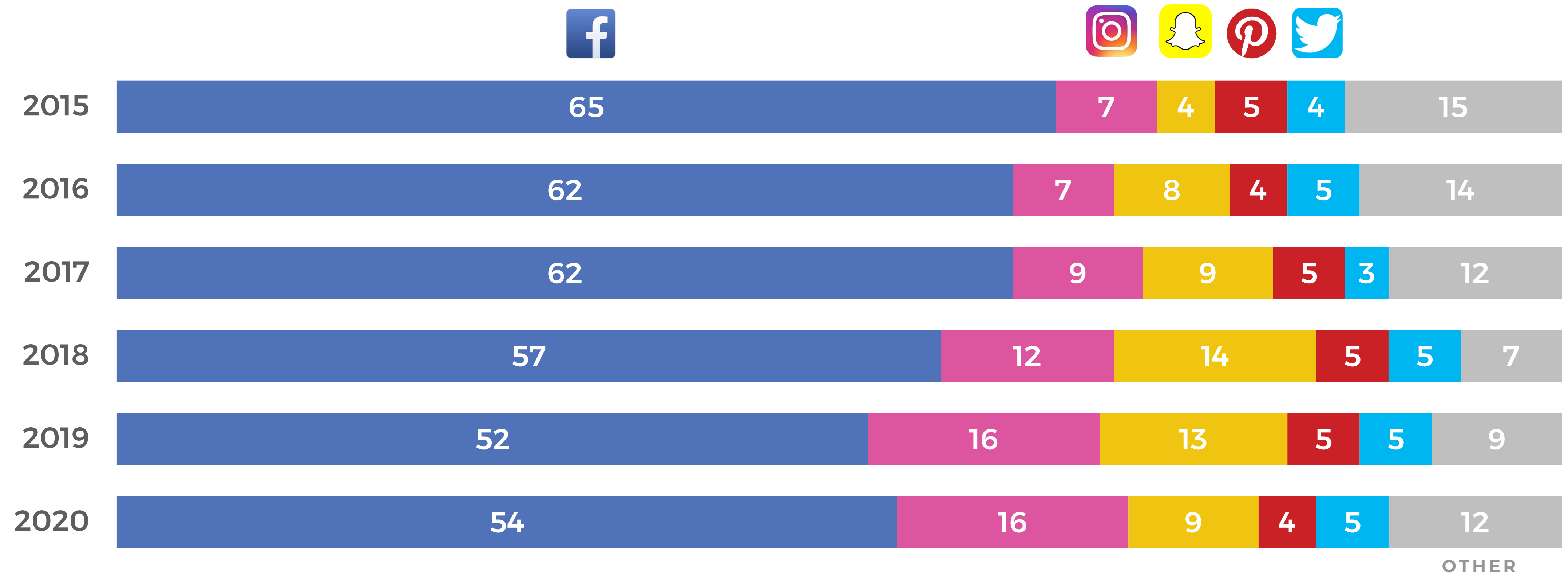
U.S. POPULATION

% USING SOCIAL MEDIA BRAND



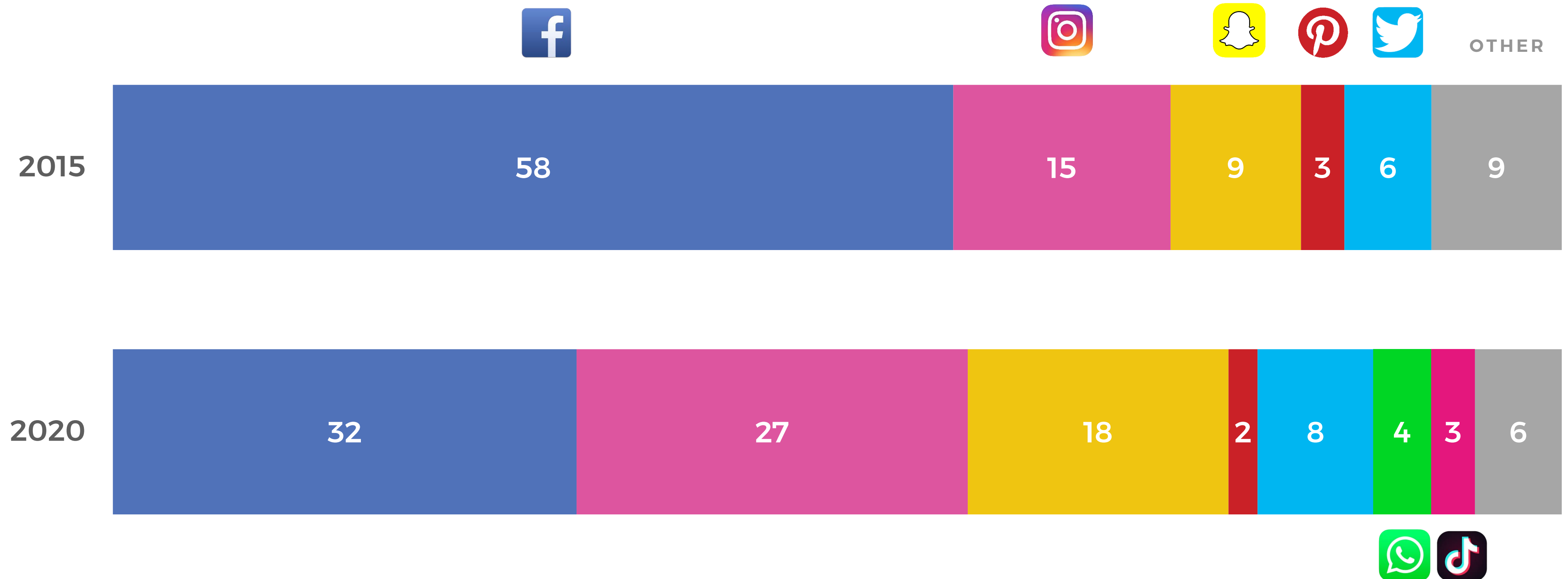
Social Media Brand Used Most Often

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



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

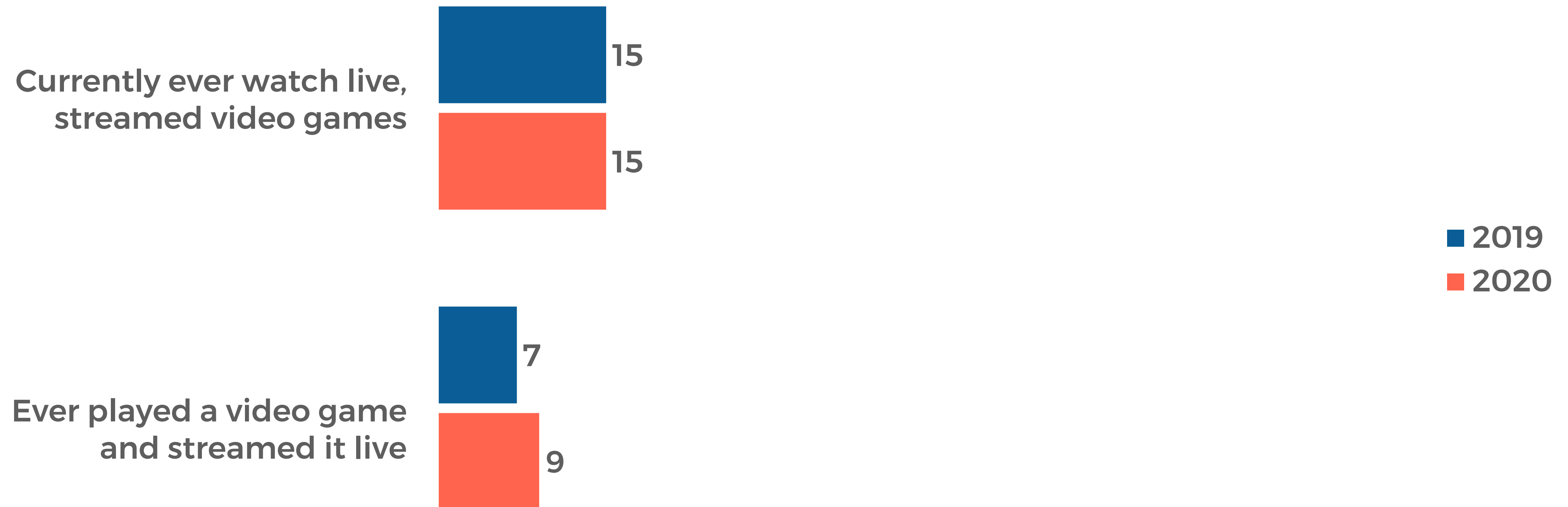
BASE: U.S. SOCIAL MEDIA USERS



Live Streamed Video Games

TOTAL U.S. POPULATION 12+

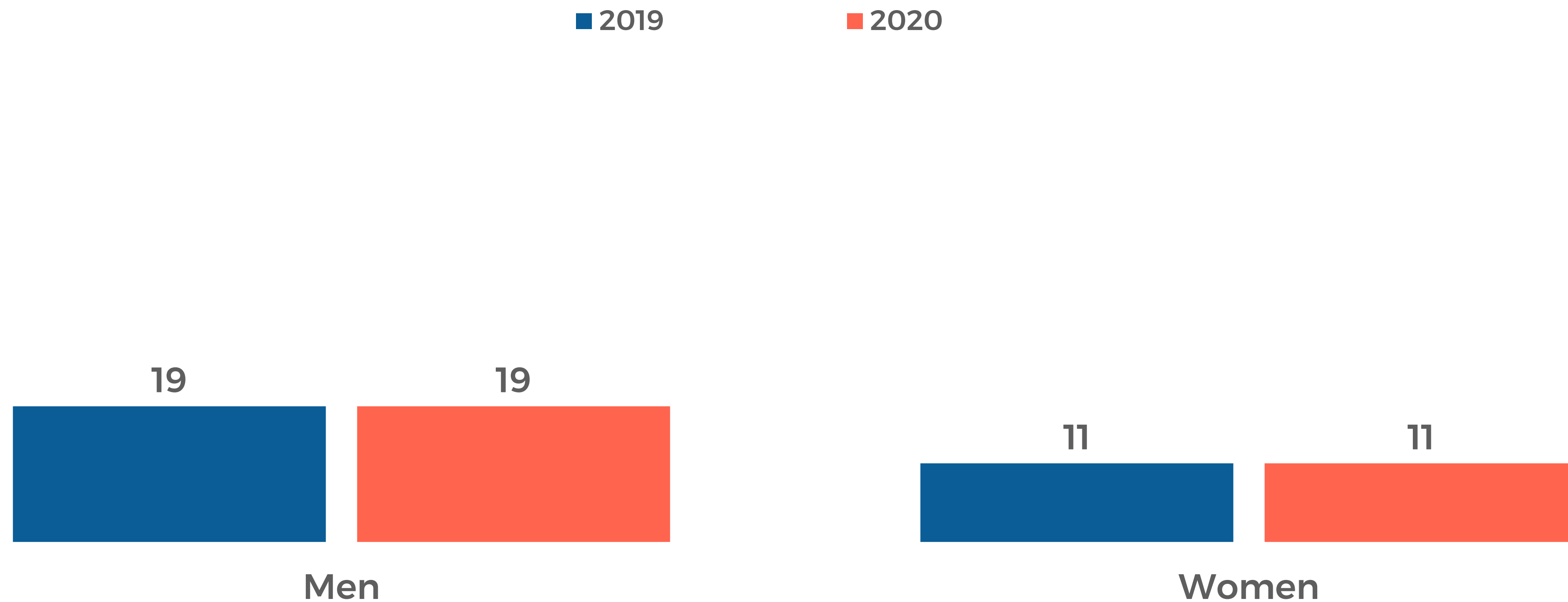
% SAYING YES



Currently Ever Watch Live Streamed Video Games

TOTAL U.S. POPULATION 12+

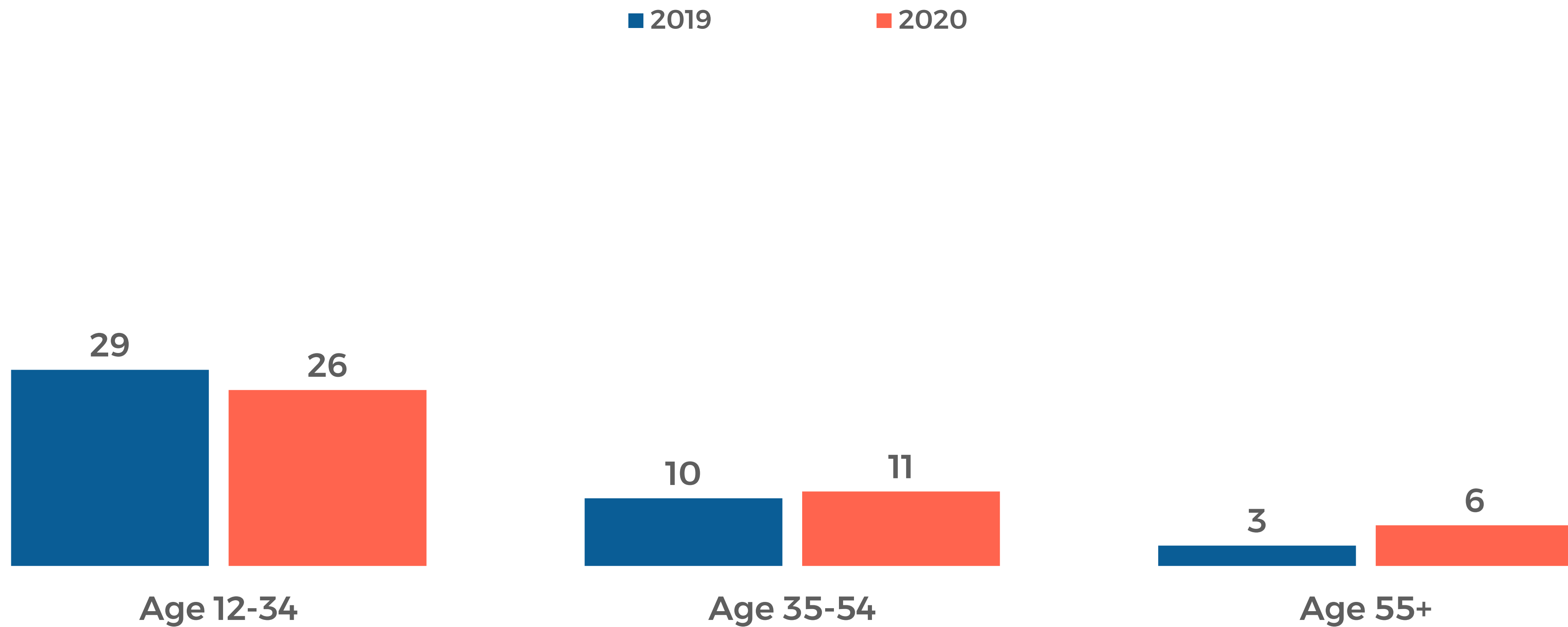
% SAYING YES



Currently Ever Watch Live Streamed Video Games

TOTAL U.S. POPULATION 12+

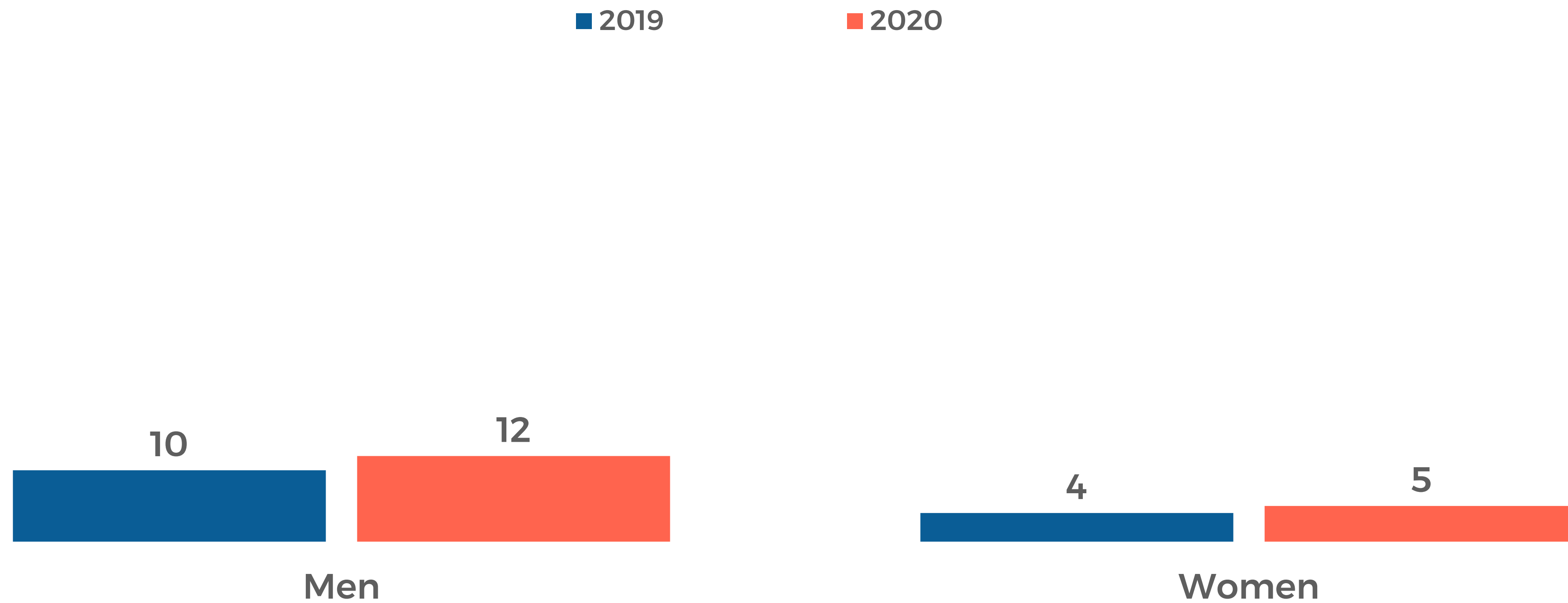
% SAYING YES



Ever Played a Video Game and Streamed It Live

TOTAL U.S. POPULATION 12+

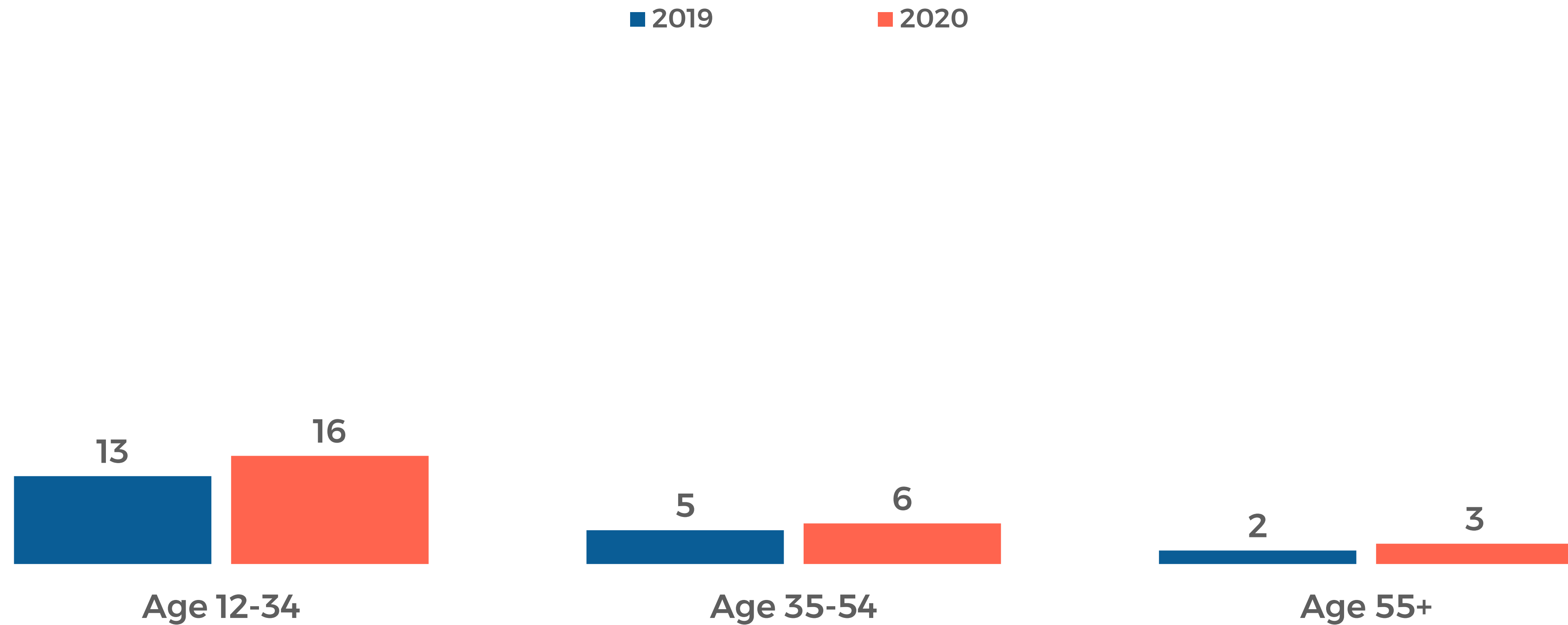
% SAYING YES



Ever Played a Video Game and Streamed It Live

TOTAL U.S. POPULATION 12+

% SAYING YES



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Online Audio



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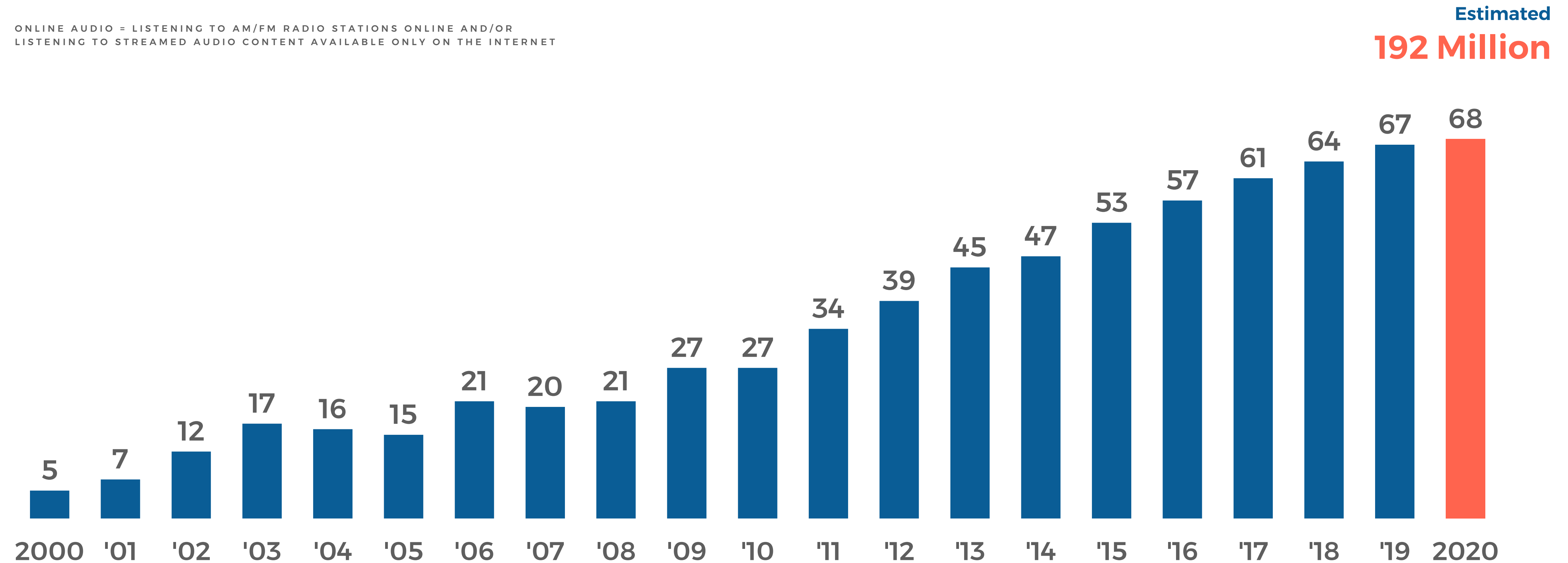
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Monthly Online Audio Listening

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



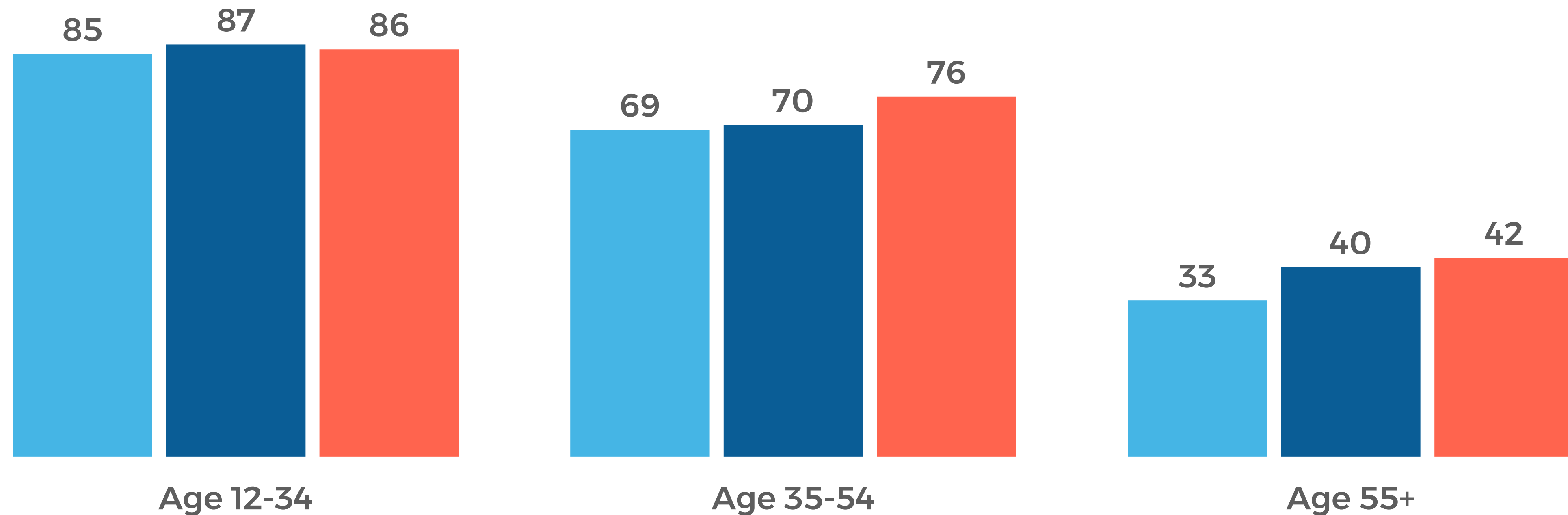
Monthly Online Audio Listening

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

■ 2018 ■ 2019 ■ 2020

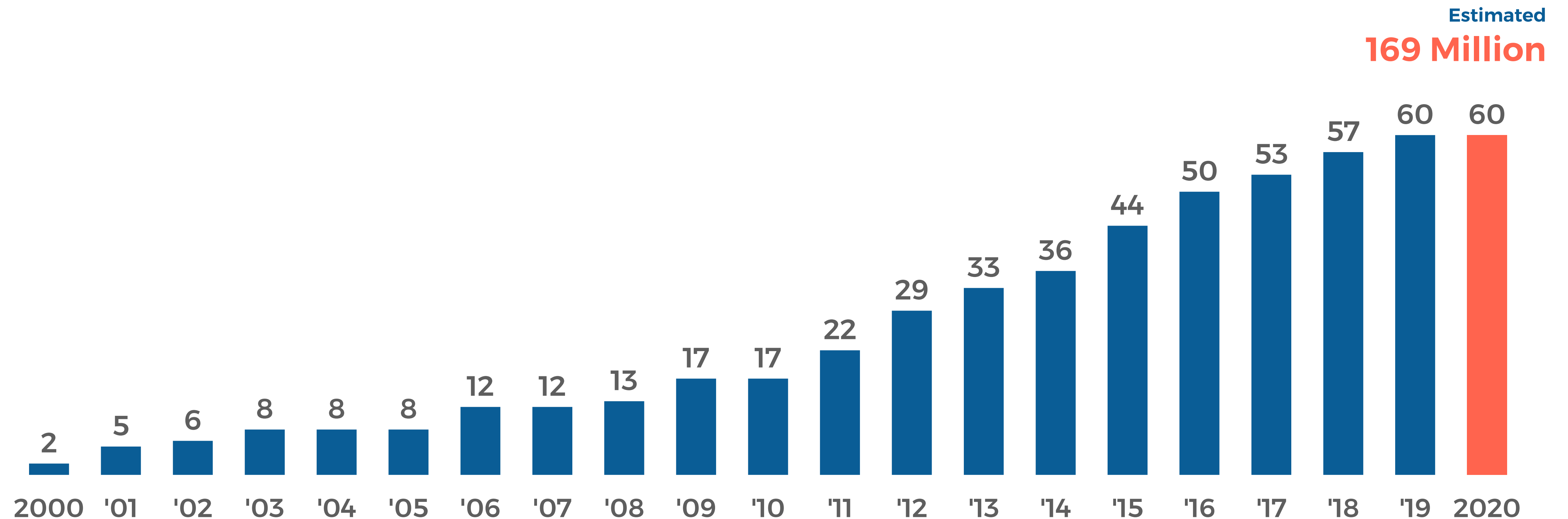


Weekly Online Audio Listening

TOTAL U.S. POPULATION 12+

% LISTENED TO ONLINE AUDIO IN LAST WEEK

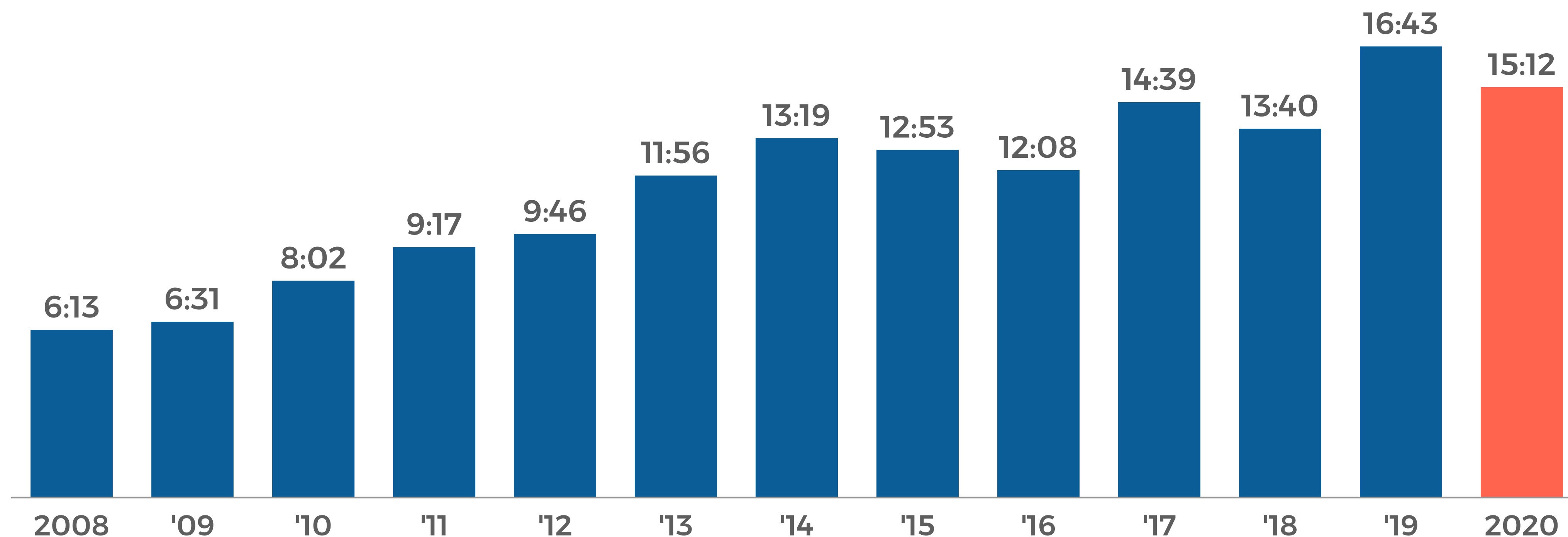
ONLINE AUDIO = LISTENING TO AM/FM RADIO STATIONS ONLINE AND/OR
LISTENING TO STREAMED AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET



Average Time Spent Listening to Online Audio

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

HOURS:MINUTES IN LAST WEEK



 THE INFINITE DIAL® 2020

Audio Brands



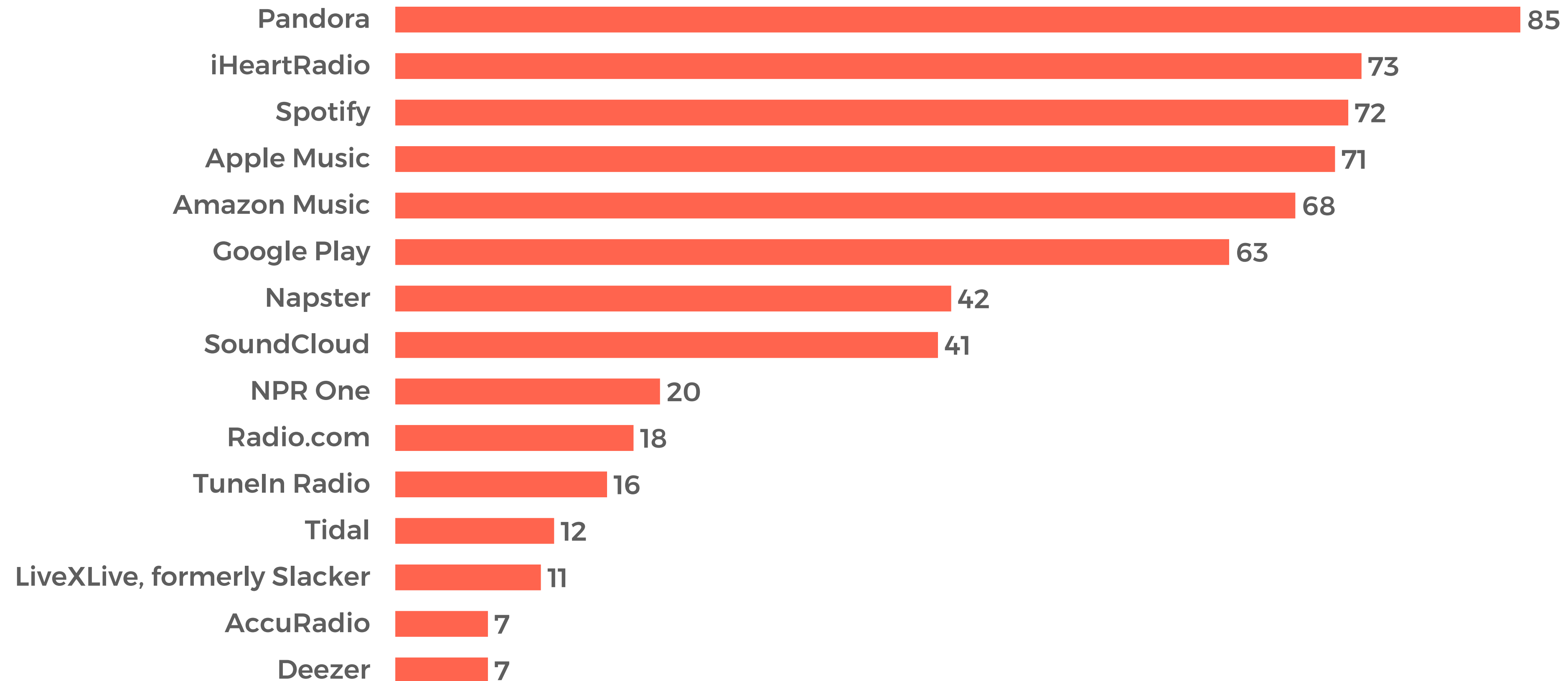
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Audio Brand Awareness

TOTAL U.S. POPULATION 12+

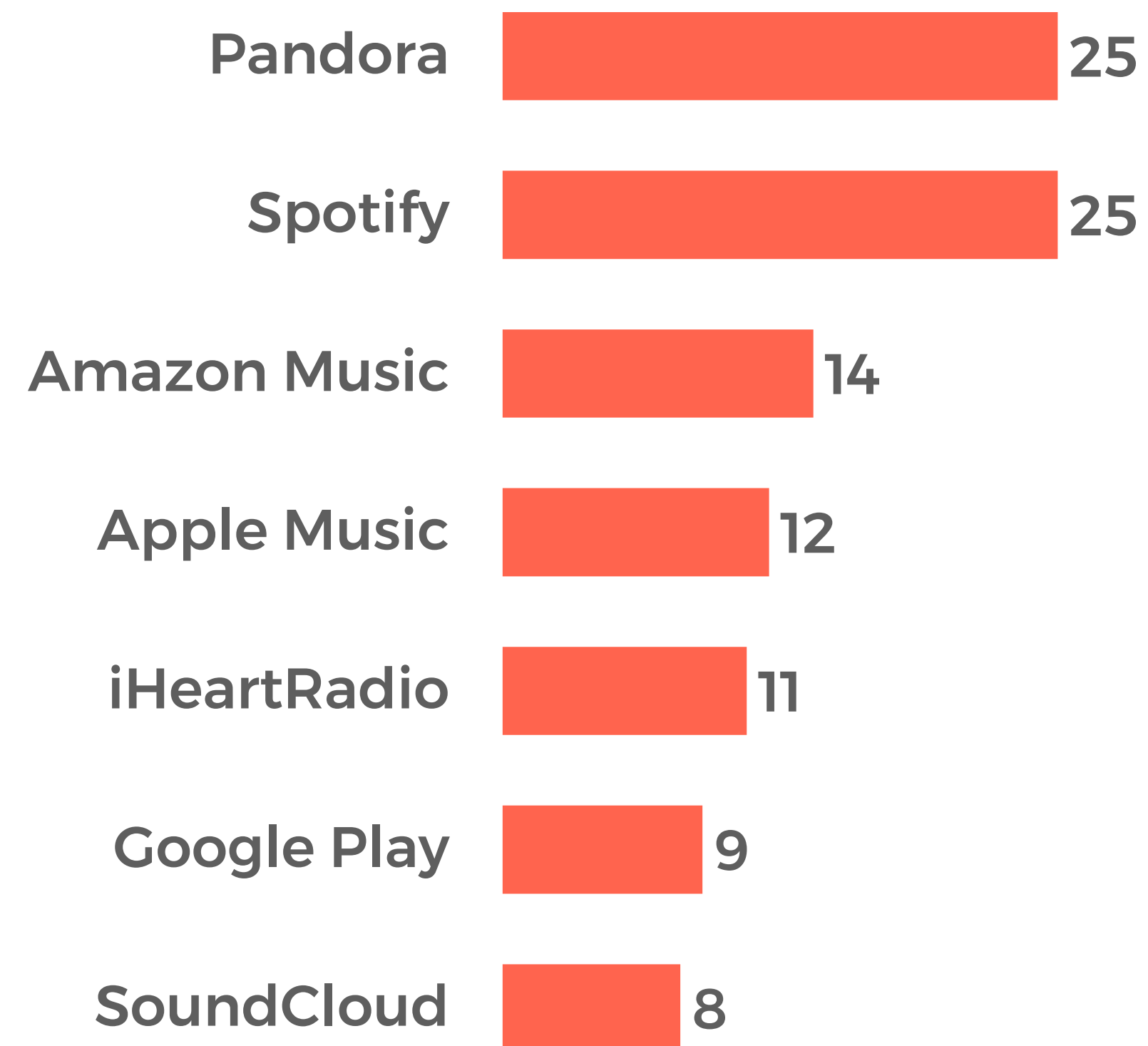
% AWARE OF AUDIO BRAND



Audio Brands Listened to in Last Month

TOTAL U.S. POPULATION 12+

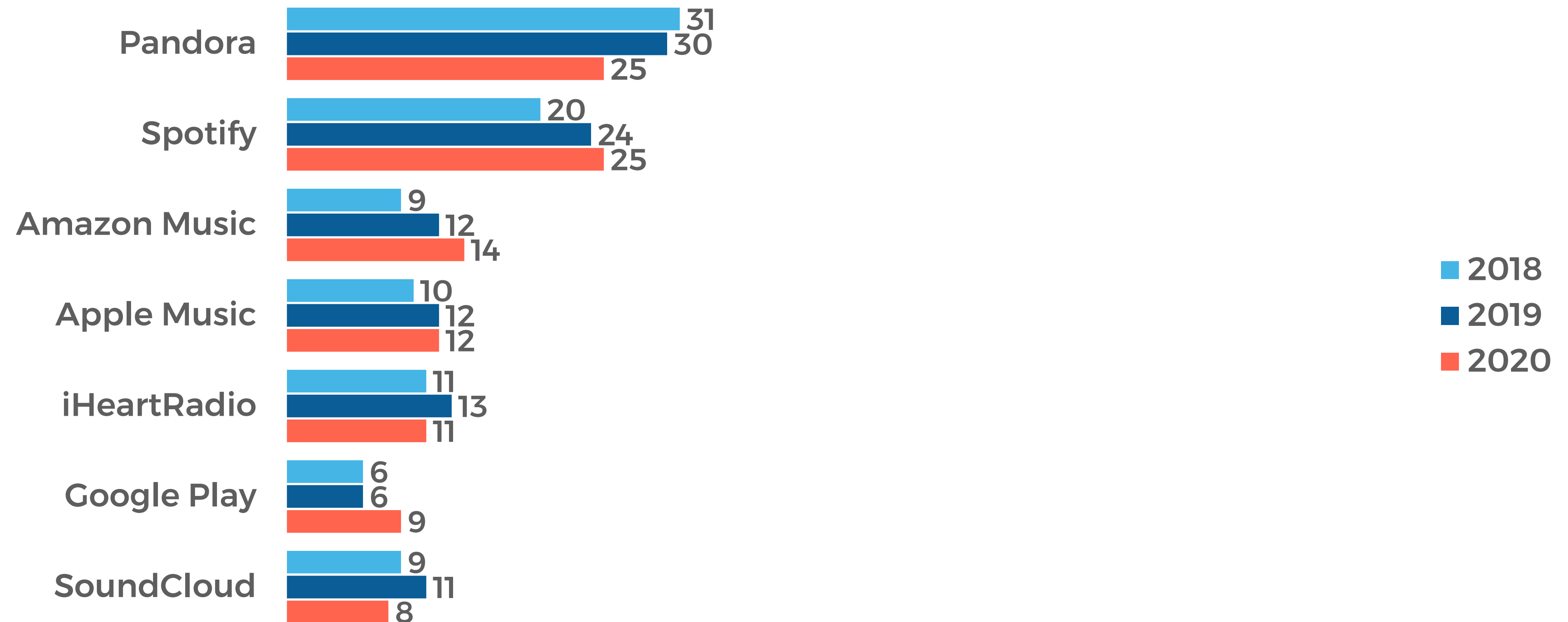
% LISTENED TO AUDIO BRAND IN LAST MONTH



Audio Brands Listened to in Last Month

TOTAL U.S. POPULATION 12+

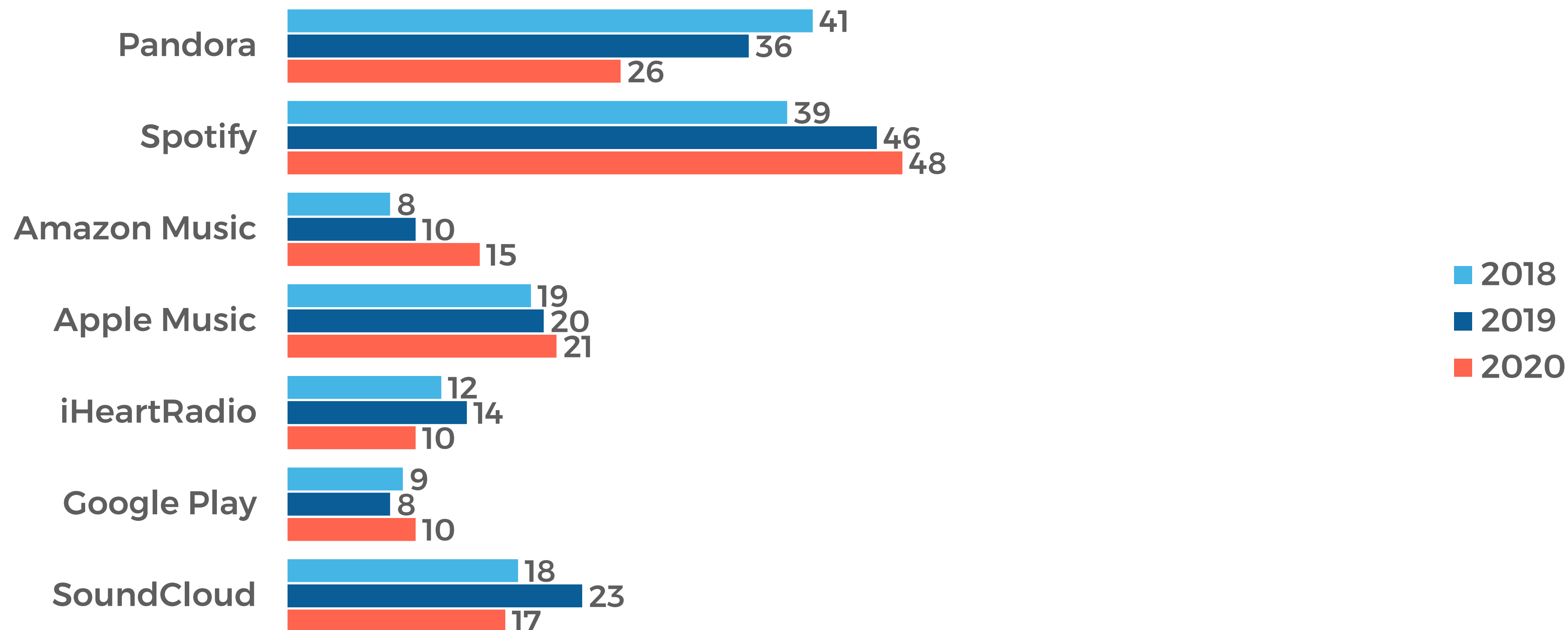
% LISTENED TO AUDIO BRAND IN LAST MONTH



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

U.S. POPULATION

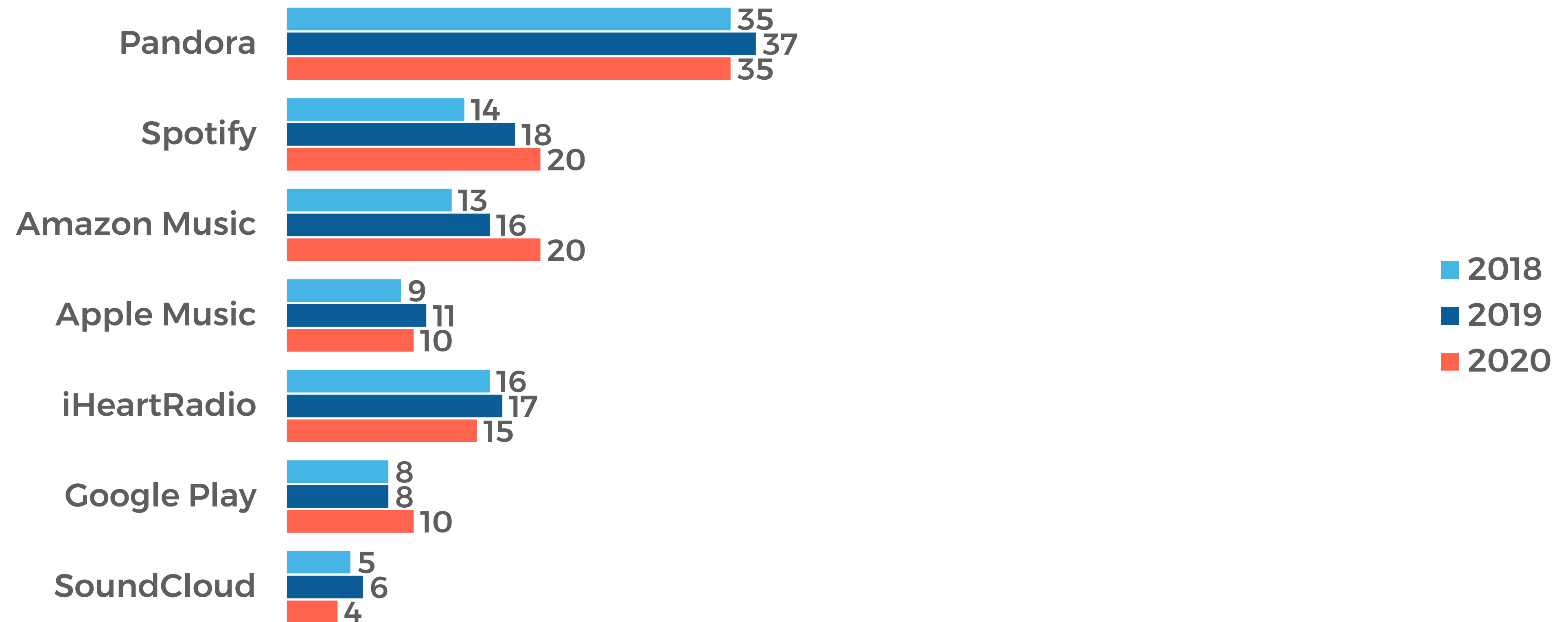
% LISTENED TO AUDIO BRAND IN LAST MONTH



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

U.S. POPULATION

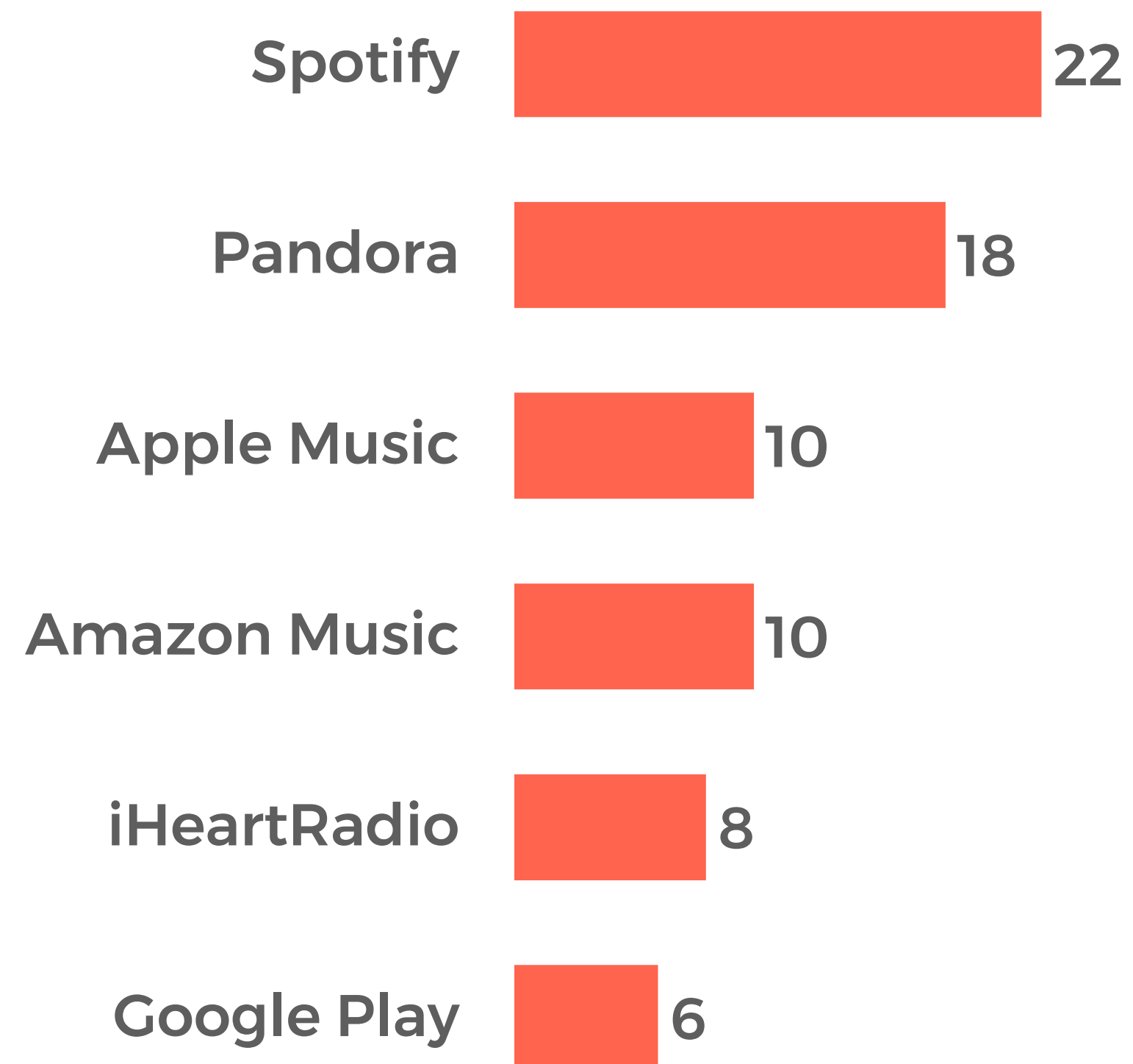
% LISTENED TO AUDIO BRAND IN LAST MONTH



Audio Brands Listened to in Last Week

TOTAL U.S. POPULATION 12+

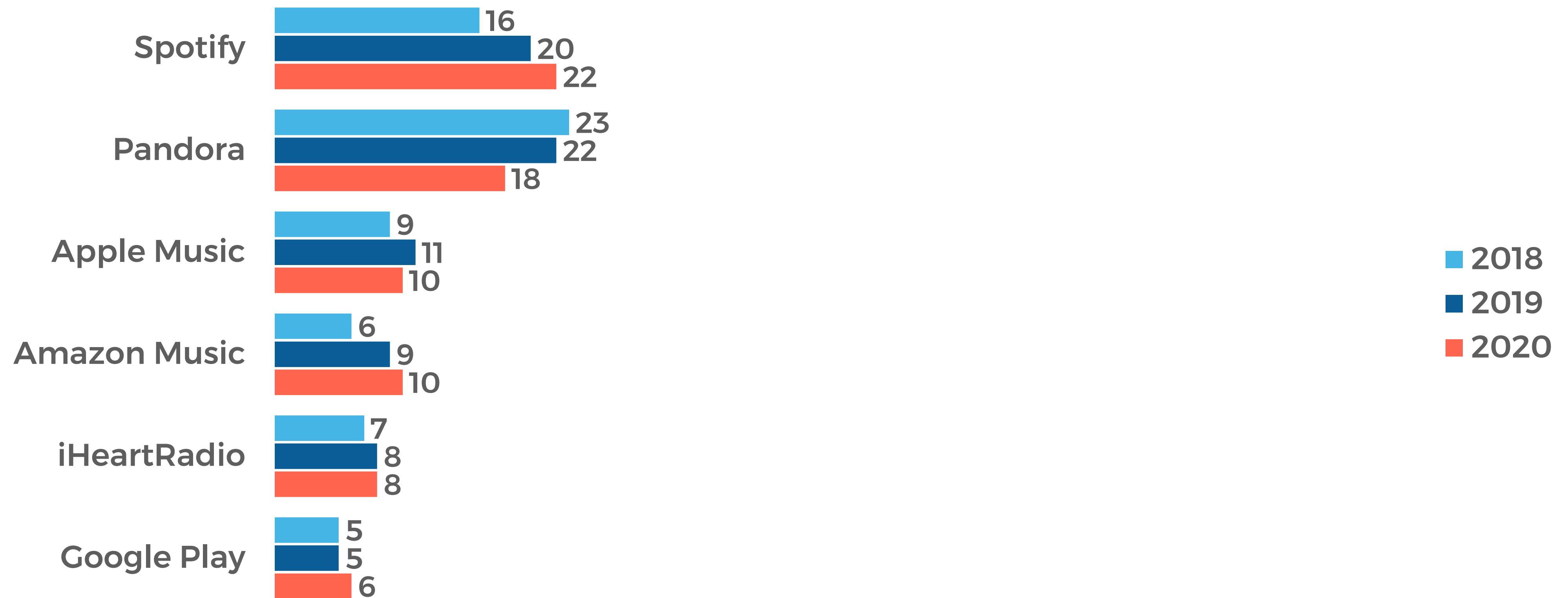
% LISTENED TO AUDIO BRAND IN LAST WEEK



Audio Brands Listened to in Last Week

TOTAL U.S. POPULATION 12+

% LISTENED TO AUDIO BRAND IN LAST WEEK



Pandora/SoundCloud Awareness and Usage

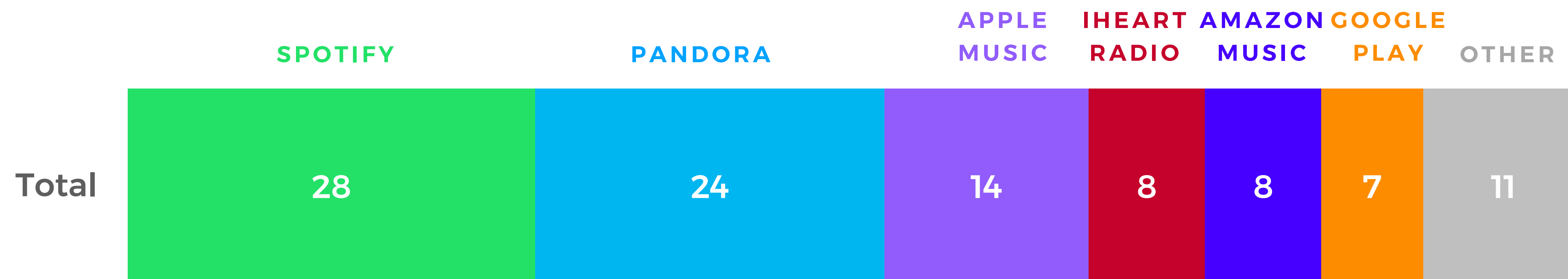
TOTAL U.S. POPULATION 12+

% SAYING YES



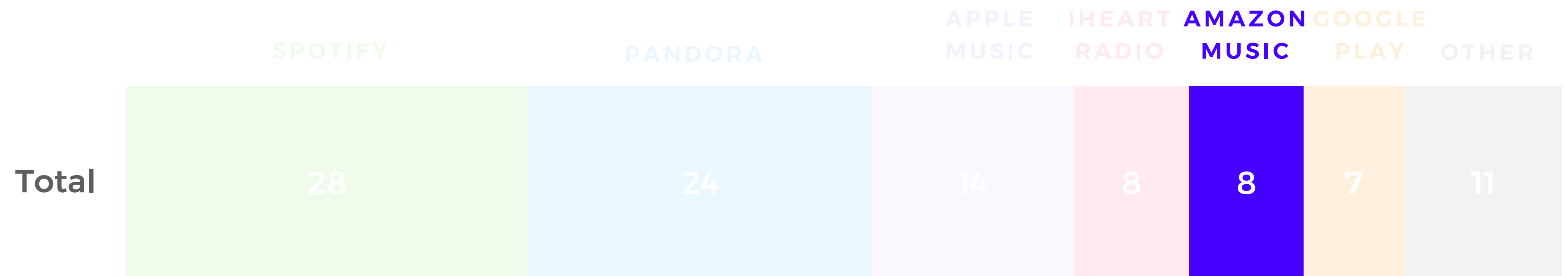
Audio Brand Used Most Often

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



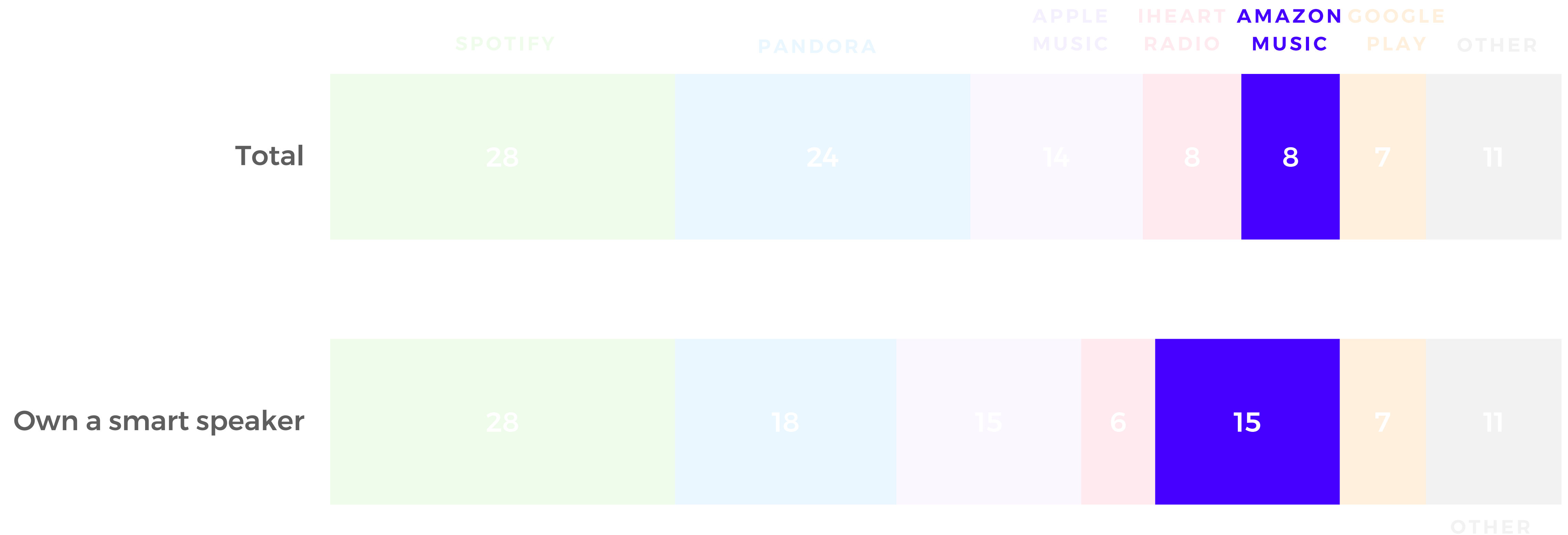
Audio Brand Used Most Often

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



Audio Brand Used Most Often

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



 THE INFINITE DIAL® 2020

In-Car Media



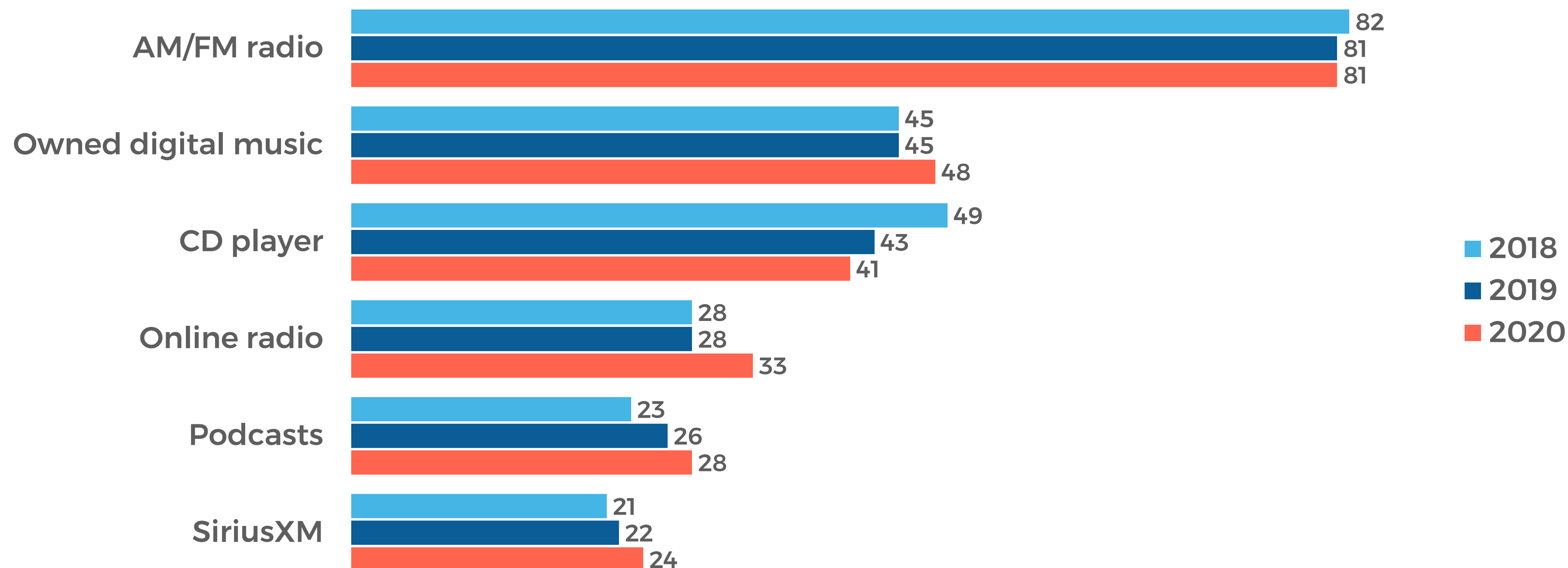
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Audio Sources Currently Ever Used in Car

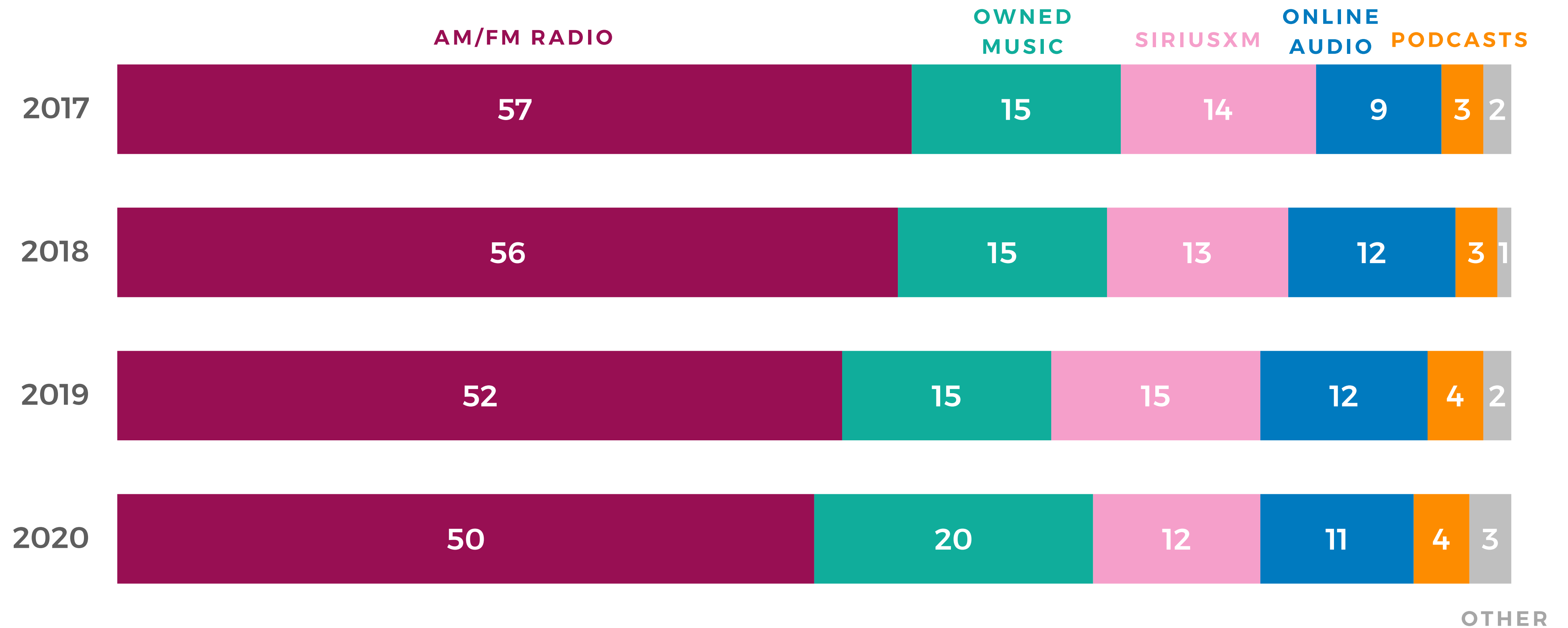
BASE: U.S. AGE 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 89%

% USING AUDIO SOURCE IN CAR



Audio Source Used Most Often in Car

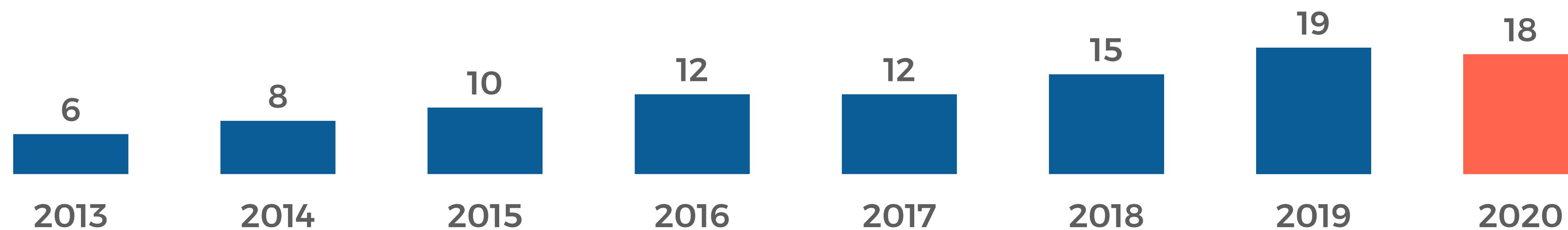
BASE: U.S. AGE 18+, DRIVEN/RIDDEN IN CAR IN LAST MONTH, AND USE ANY AUDIO SOURCE IN CAR



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



Vehicle Integrated Mobile Operating Systems

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

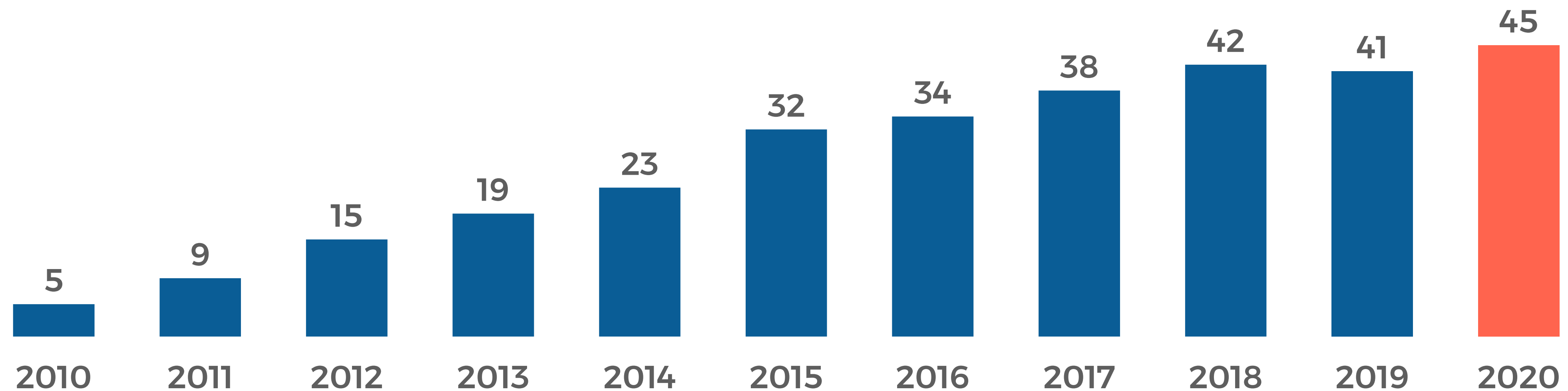
% HAVE SYSTEM IN PRIMARY VEHICLE

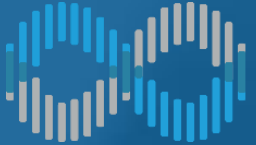


Online Audio Listening in Car Through a Cell Phone

TOTAL U.S. POPULATION 12+

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



 THE INFINITE DIAL® 2020

Podcasting



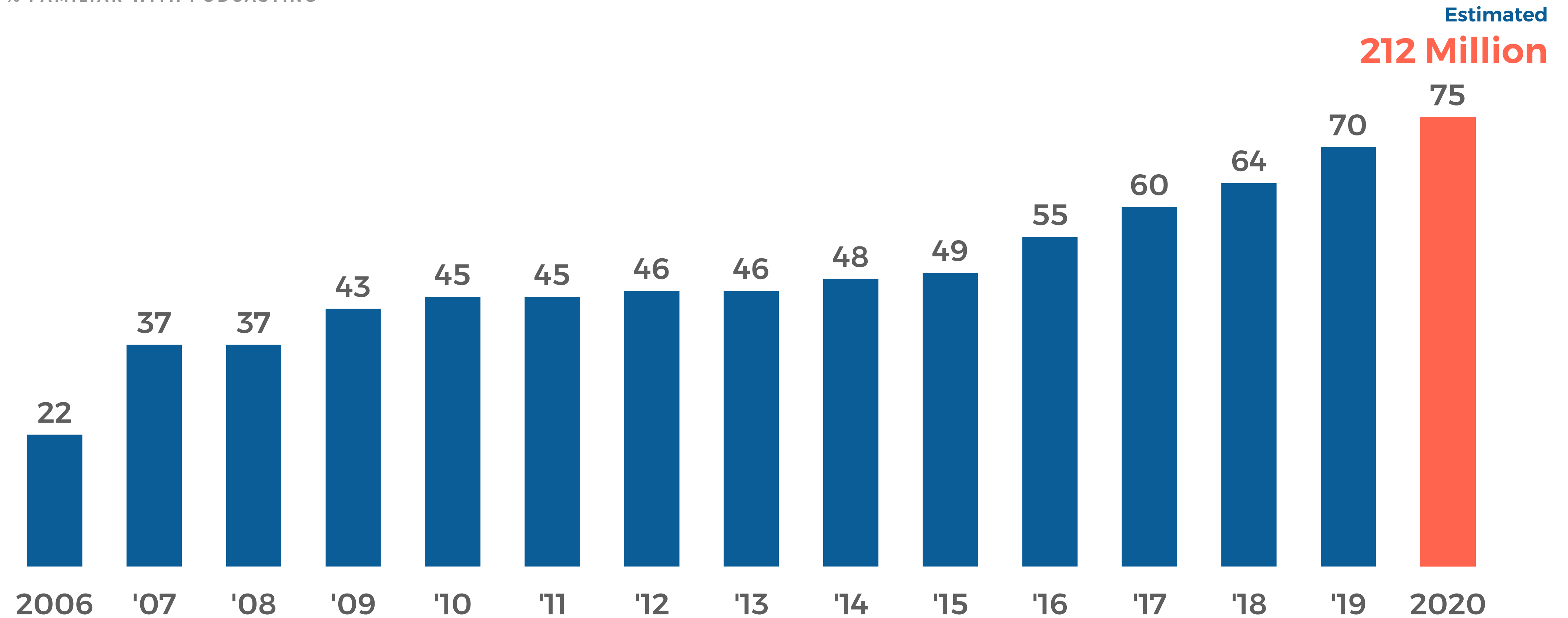
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Podcasting Familiarity

TOTAL U.S. POPULATION 12+

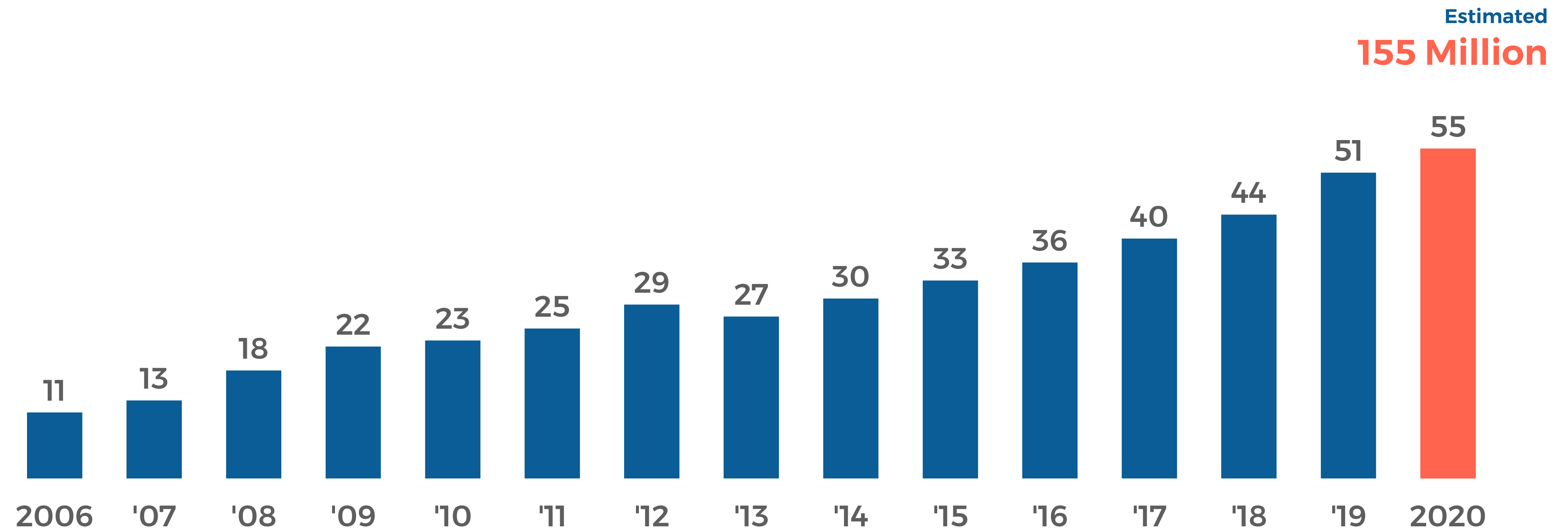
% FAMILIAR WITH PODCASTING



Podcasting Listening

TOTAL U.S. POPULATION 12+

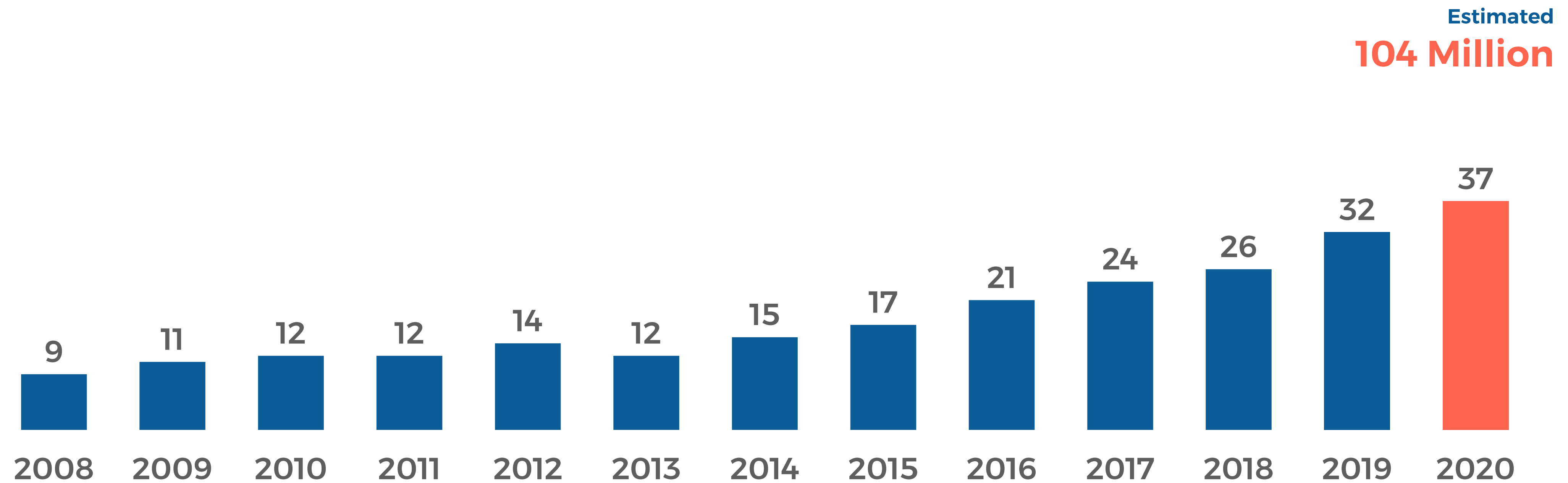
% EVER LISTENED TO A PODCAST



Monthly Podcast Listening

TOTAL U.S. POPULATION 12+

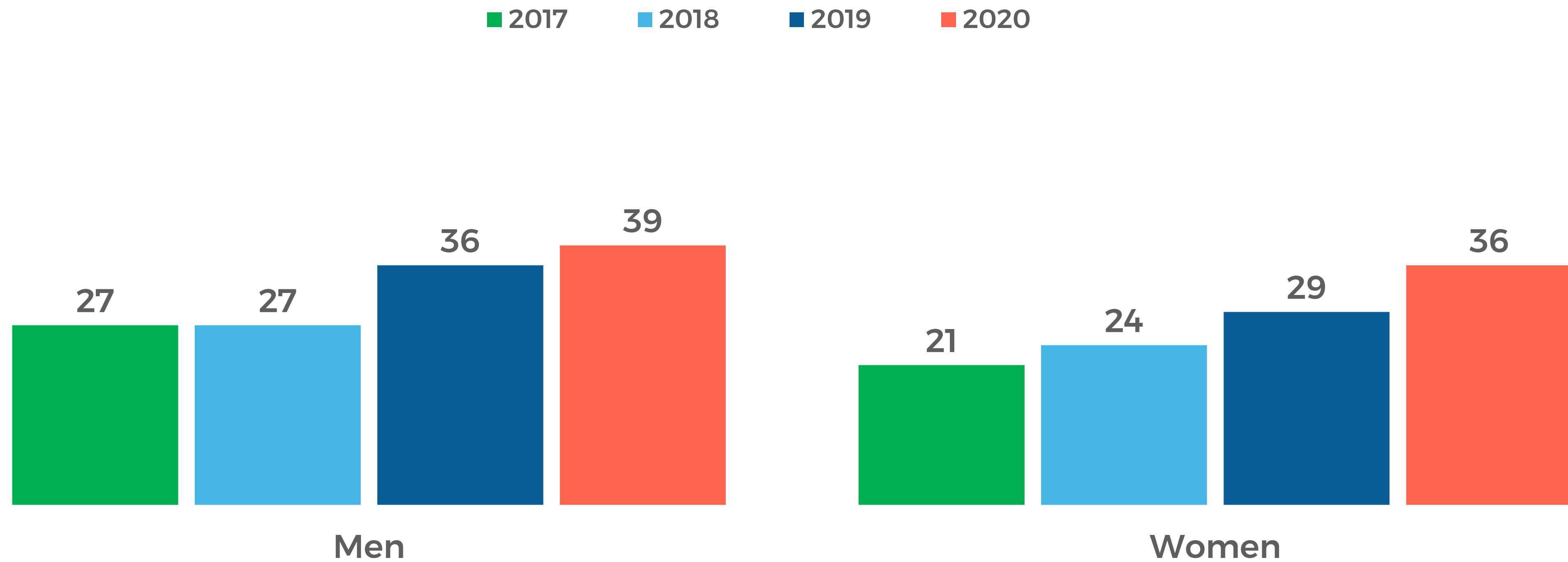
% LISTENED TO A PODCAST IN LAST MONTH



Monthly Podcast Listening

U.S. POPULATION

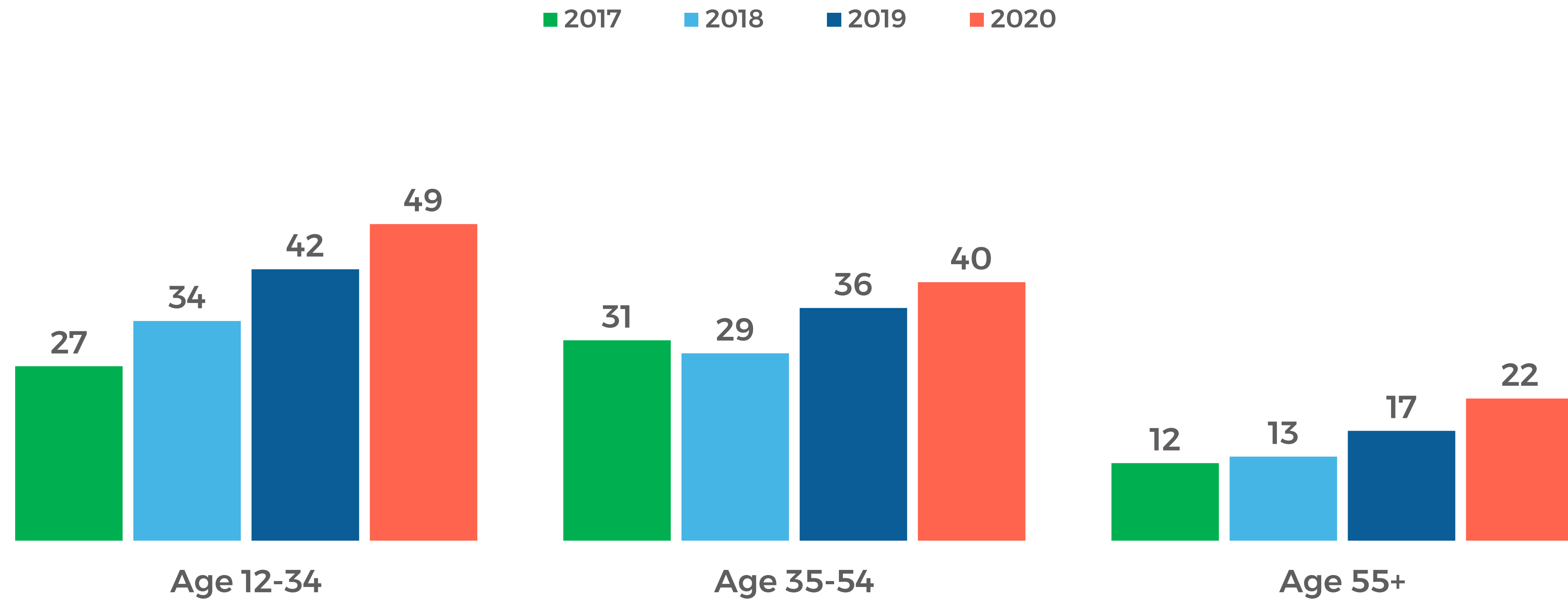
% LISTENED TO A PODCAST IN LAST MONTH



Monthly Podcast Listening

U.S. POPULATION

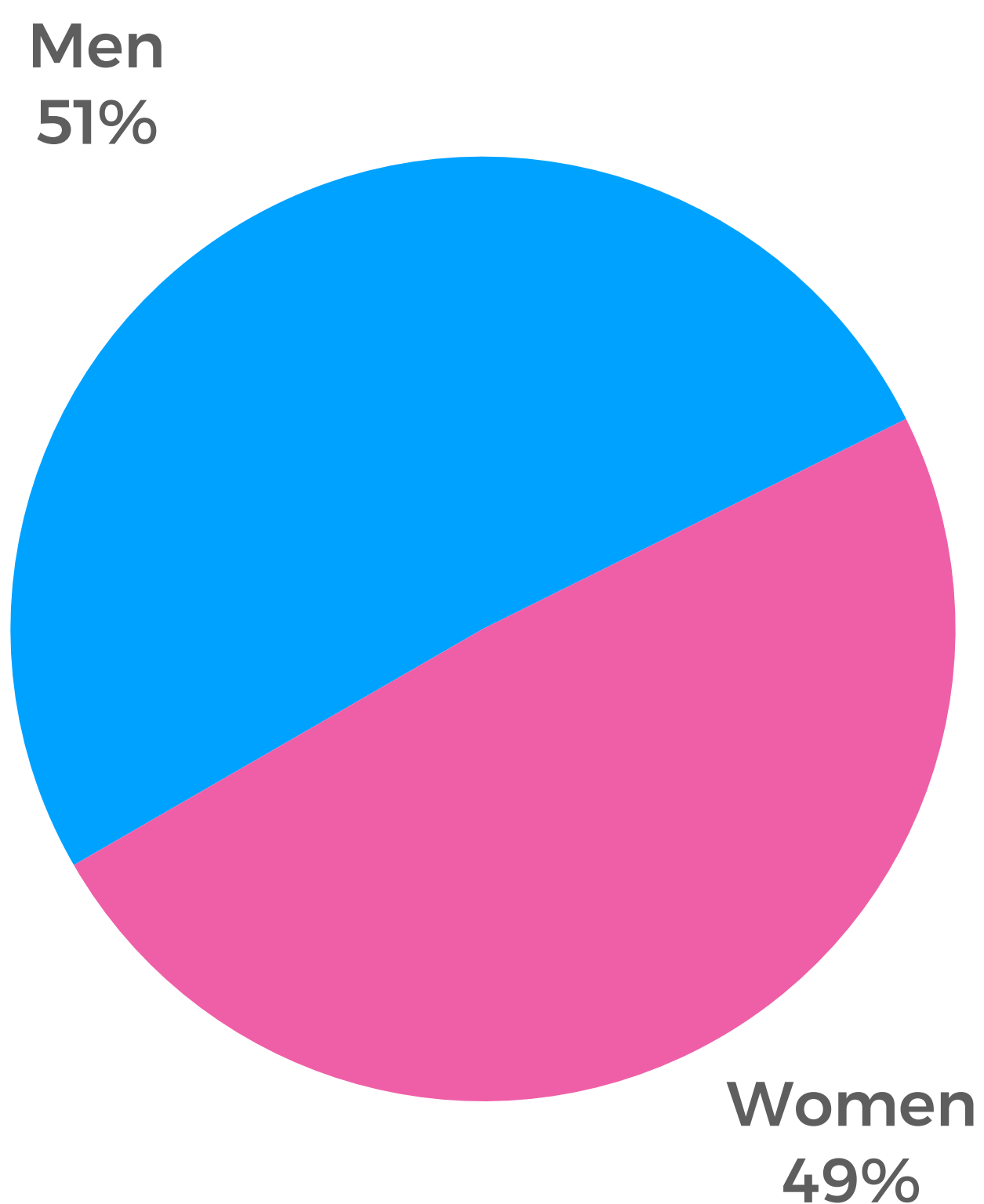
% LISTENED TO A PODCAST IN LAST MONTH



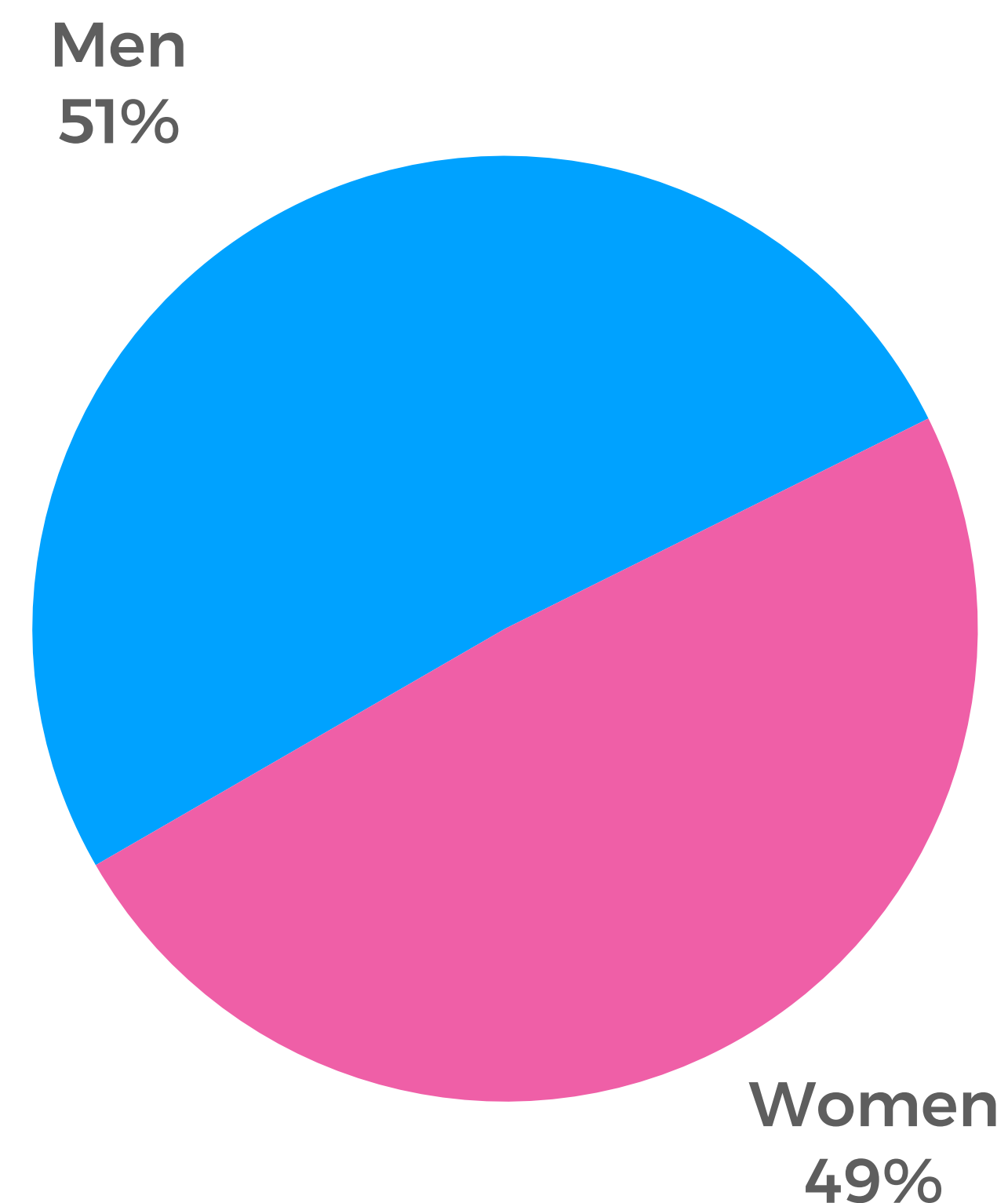
Sex of Monthly Podcast Listeners

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

U.S. POPULATION 12+



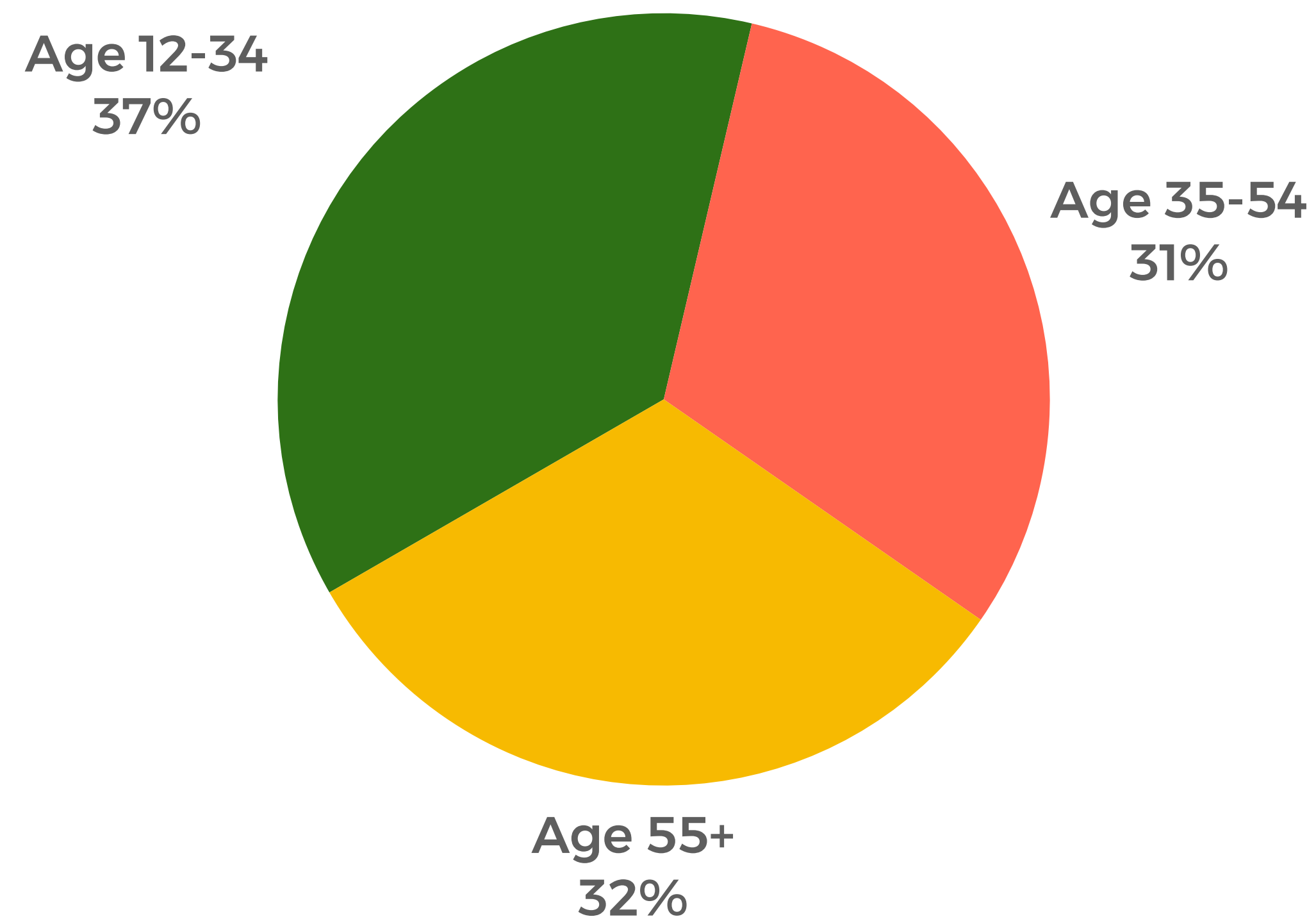
MONTHLY PODCAST CONSUMERS 12+



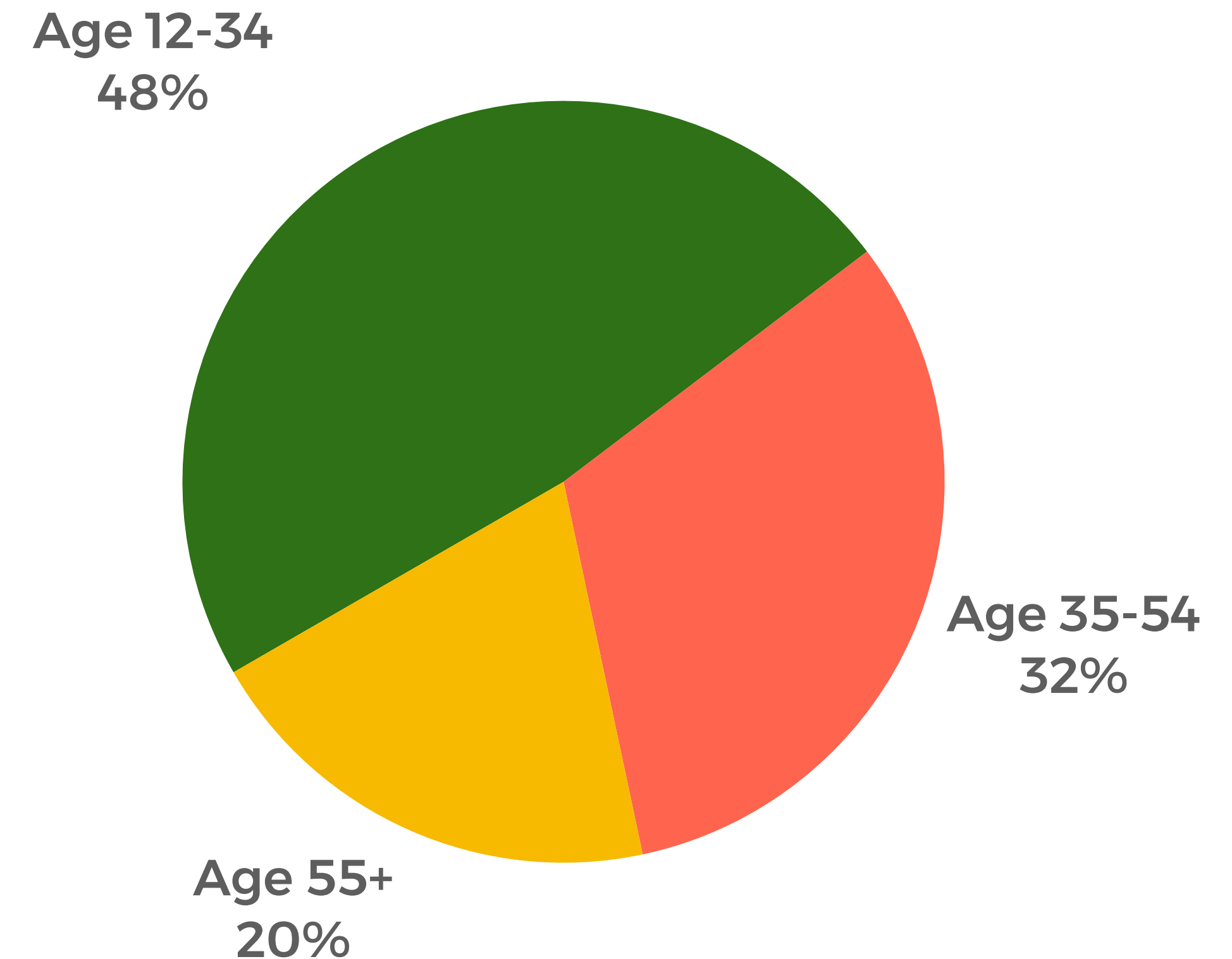
Age of Monthly Podcast Listeners

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

U.S. POPULATION 12+



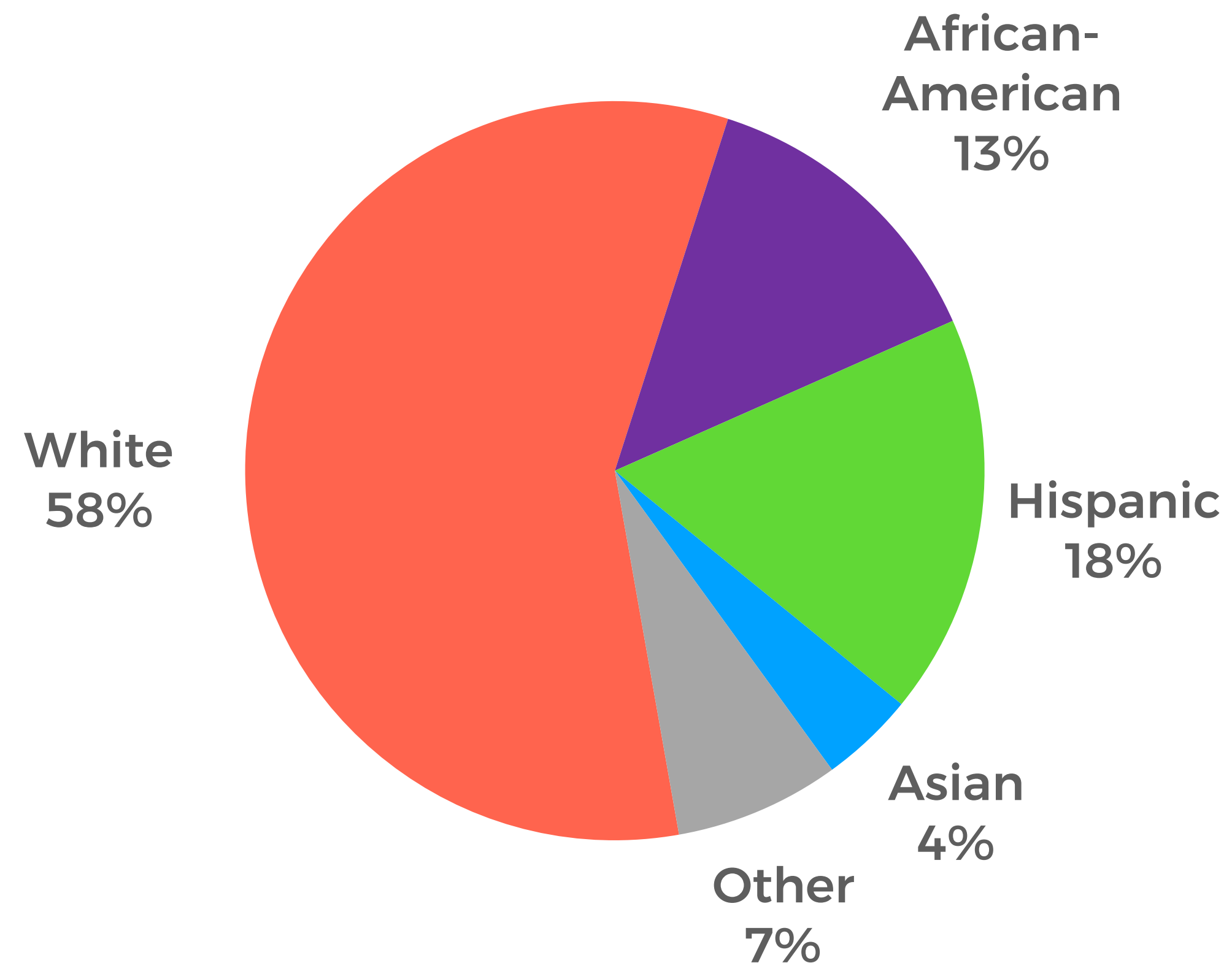
MONTHLY PODCAST CONSUMERS 12+



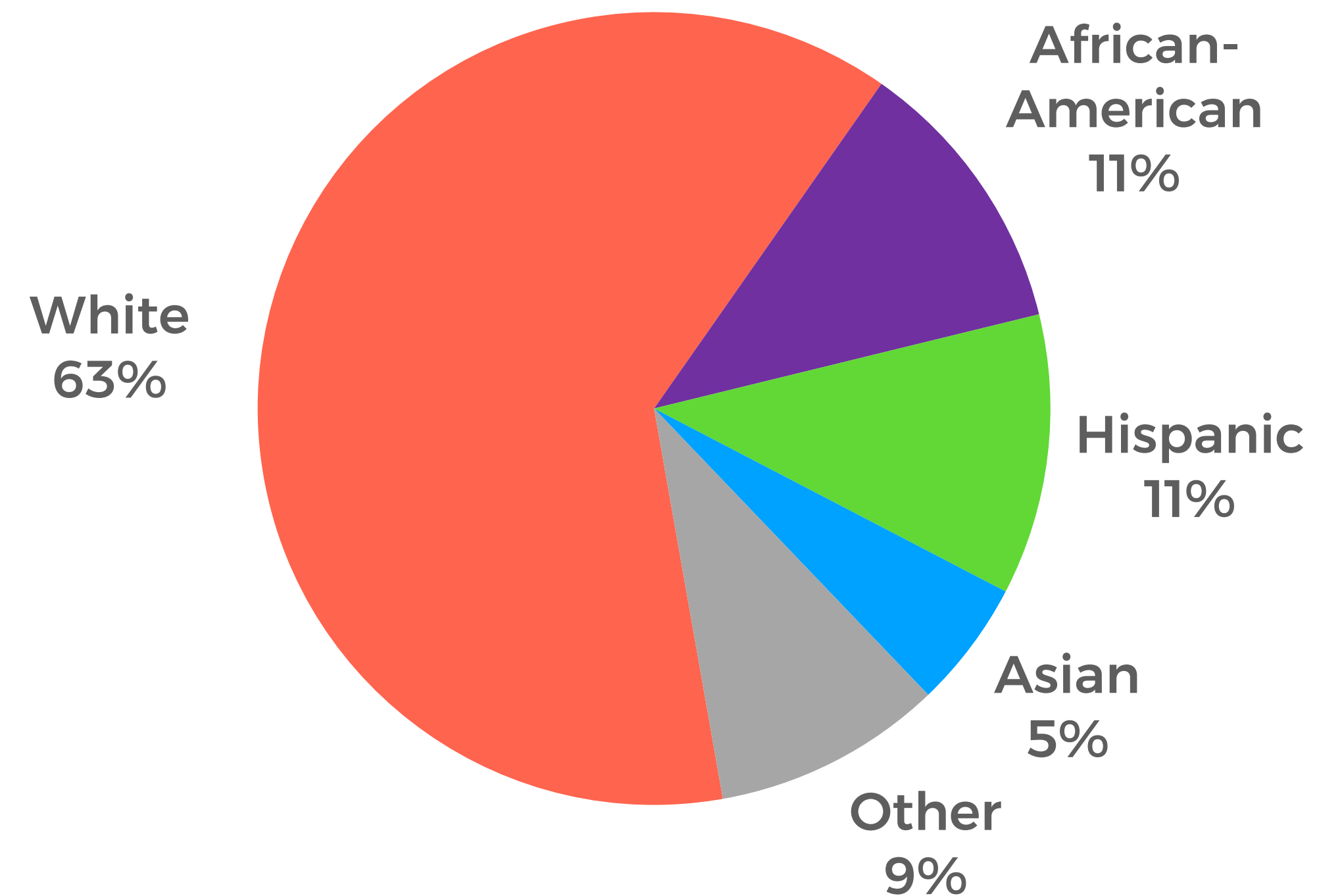
Ethnicity of Monthly Podcast Listeners

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

U.S. POPULATION 12+



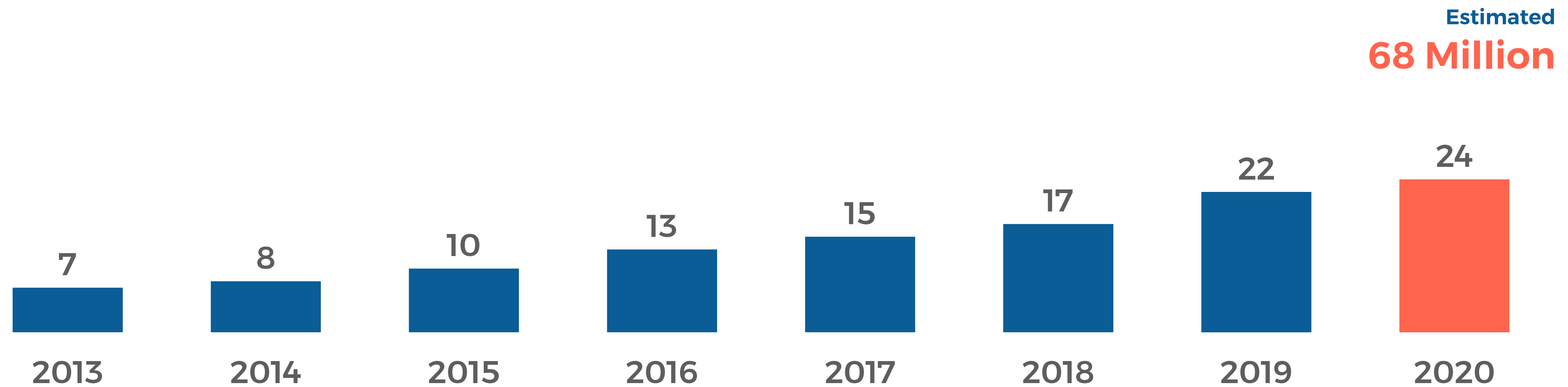
MONTHLY PODCAST CONSUMERS 12+



Weekly Podcast Listening

TOTAL U.S. POPULATION 12+

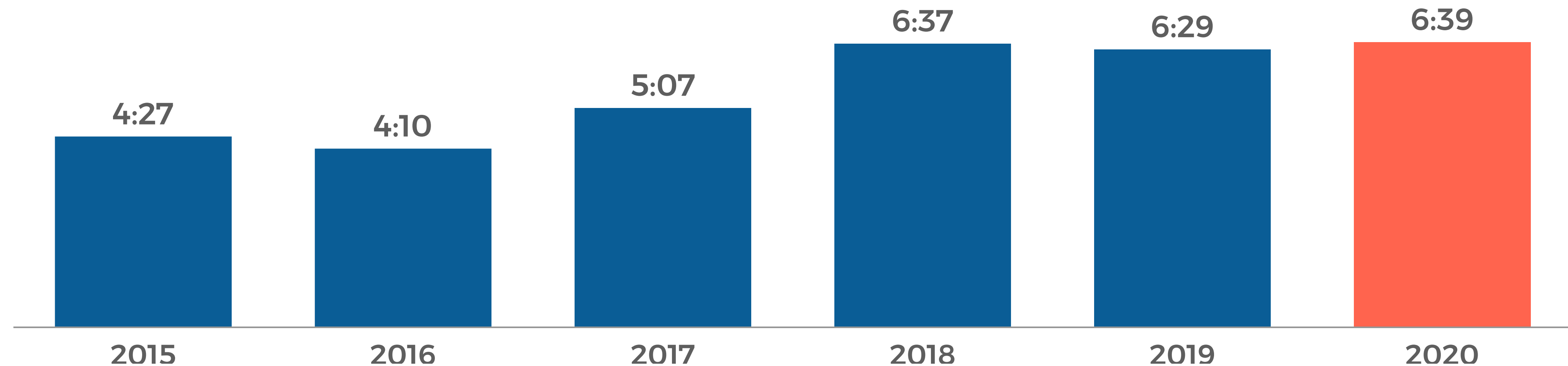
% LISTENED TO A PODCAST IN LAST WEEK



Average Time Spent Listening to Podcasts

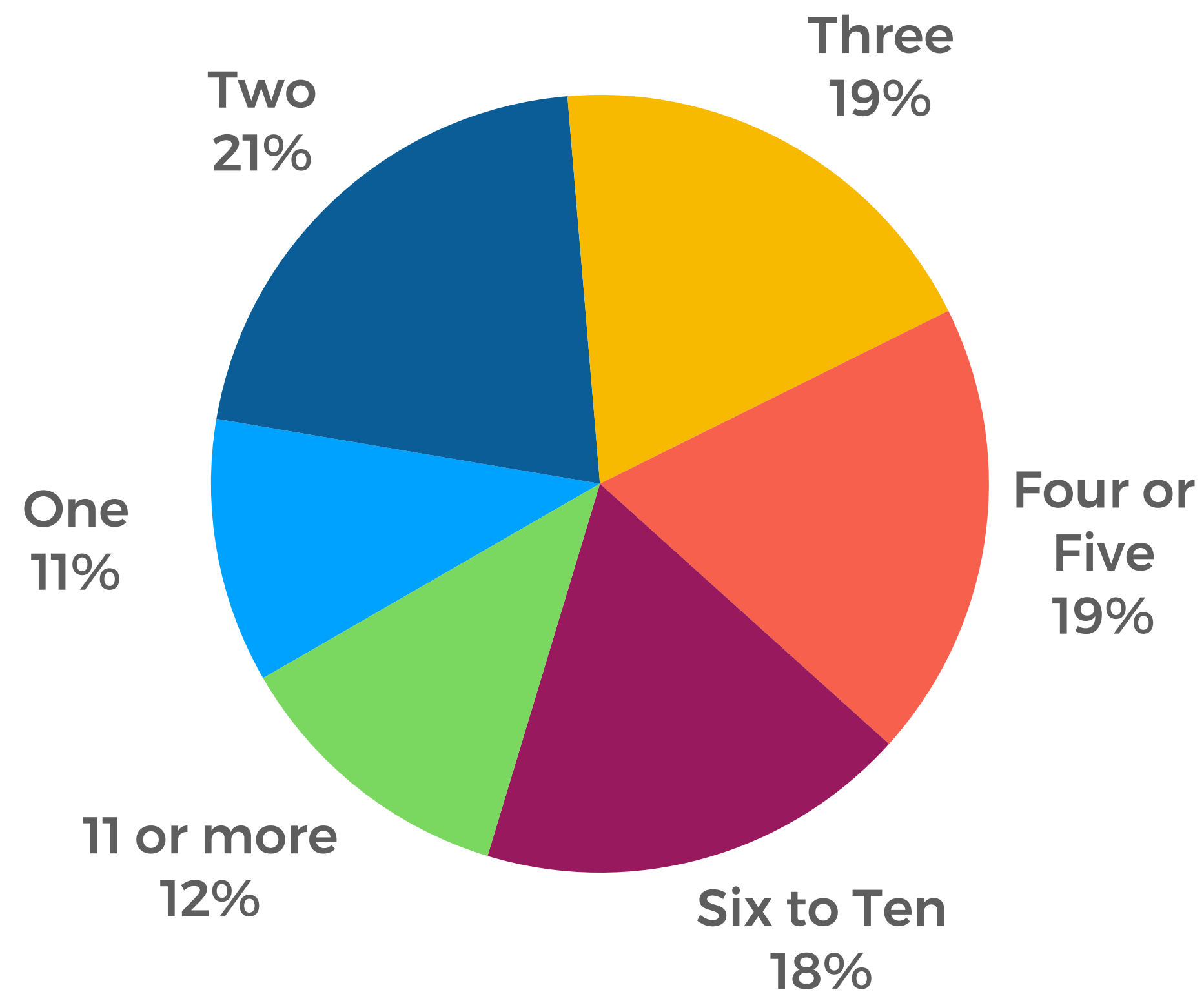
BASE: U.S. AGE 12+ AND LISTENED TO PODCAST IN LAST WEEK

HOURS:MINUTES 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
Six podcasts
in the last week

Observations

Monthly podcast consumers grew by 16% year-over-year, cresting 100 million Americans for the first time.

Observations

Approximately 169 million Americans listened to online audio in the last week, spending an average of over 15 hours doing so.

Observations

More than six in ten Americans use some form of voice assistant technology. It is incumbent upon content producers to ensure their content is easily retrievable through voice.

Observations

With nearly one-third of smart speaker owners having three or more devices in their homes, there is increased opportunity to produce audio for environments and contexts previously underserved.

Observations

With smartphone, tablet, and smartwatch showing no new growth, in-car currently holds the most potential for digital audio growth.

Observations

In-car media users continue to incorporate digital audio, though AM/FM remains strong.

Observations

Pandora and Spotify are tied among Americans 12+ for monthly users, while Amazon music has become a strong third, buoyed by smart speaker owners.

Observations

Social media's growth cycle seems to have ended, though Instagram continues to show growth, and TikTok has made a strong early impression.



Coming Soon

April 2, 2020

Inside an award-winning content marketing program: The Infinite Dial

April 16, 2020

Portents for November: A review of the Edison Research Democratic Primary Exit Polls

Details soon

The Infinite Dial – Australia

Details soon

Moms and Media

Details soon

The Infinite Dial – Canada

Details to follow at www.edisonresearch.com



The Infinite Dial 2020

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