The Infinite Dial 2020

#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
- 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
Smartphone Ownership
TOTAL U.S. POPULATION 12+
% OWNING A SMARTPHONE

Estimated
240 Million

<table>
<thead>
<tr>
<th>Year</th>
<th>Ownership</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>10</td>
</tr>
<tr>
<td>2010</td>
<td>14</td>
</tr>
<tr>
<td>2011</td>
<td>31</td>
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<tr>
<td>2012</td>
<td>44</td>
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<tr>
<td>2013</td>
<td>53</td>
</tr>
<tr>
<td>2014</td>
<td>61</td>
</tr>
<tr>
<td>2015</td>
<td>71</td>
</tr>
<tr>
<td>2016</td>
<td>76</td>
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<td>2017</td>
<td>81</td>
</tr>
<tr>
<td>2018</td>
<td>83</td>
</tr>
<tr>
<td>2019</td>
<td>84</td>
</tr>
<tr>
<td>2020</td>
<td>85</td>
</tr>
</tbody>
</table>
Tablet Ownership

TOTAL U.S. POPULATION 12+

% OWNING A TABLET

Estimated 149 Million

- 2013: 29%
- 2014: 39%
- 2015: 49%
- 2016: 51%
- 2017: 53%
- 2018: 50%
- 2019: 56%
- 2020: 53%

Smartwatch Ownership

TOTAL U.S. POPULATION 12+

% OWNING A SMARTWATCH

2017: 9
2018: 9
2019: 17
2020: 17

Estimated
48 Million
Smart Speaker Awareness
TOTAL U.S. POPULATION 12+
% AWARE OF ANY SMART SPEAKER BRAND

2017: 69
2018: 75
2019: 79
2020: 78

Estimated
220 Million
Smart Speaker Ownership

TOTAL U.S. POPULATION 12+

% OWNING A SMART SPEAKER

2017: 7
2018: 18
2019: 23
2020: 27

Estimated
76 Million

#InfiniteDial
Smart Speaker Ownership

TOTAL U.S. POPULATION 12+
% OWNING SMART SPEAKER

Amazon Alexa: 21%
Google Home: 11%
Apple HomePod: 1%
Number of Smart Speakers in Household

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

<table>
<thead>
<tr>
<th>Year</th>
<th>ONE</th>
<th>TWO</th>
<th>THREE OR MORE</th>
<th>MEAN # OF SMART SPEAKERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>67</td>
<td>22</td>
<td>11</td>
<td>1.7</td>
</tr>
<tr>
<td>2019</td>
<td>48</td>
<td>28</td>
<td>24</td>
<td>2.0</td>
</tr>
</tbody>
</table>
Number of Smart Speakers in Household

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

<table>
<thead>
<tr>
<th>Year</th>
<th>One</th>
<th>Two</th>
<th>Three or More</th>
<th>Mean # of Smart Speakers</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>67</td>
<td>22</td>
<td>11</td>
<td>1.7</td>
</tr>
<tr>
<td>2019</td>
<td>48</td>
<td>28</td>
<td>24</td>
<td>2.0</td>
</tr>
<tr>
<td>2020</td>
<td>45</td>
<td>23</td>
<td>32</td>
<td>2.2</td>
</tr>
</tbody>
</table>
Number of Radios in Household

TOTAL U.S. POPULATION 12+

<table>
<thead>
<tr>
<th>Year</th>
<th>Zero</th>
<th>One to Three</th>
<th>Four or More</th>
<th>Mean # of Radios</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>4</td>
<td>64</td>
<td>32</td>
<td>3.0</td>
</tr>
<tr>
<td>2012</td>
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<td>70</td>
<td>20</td>
<td>2.4</td>
</tr>
<tr>
<td>2016</td>
<td>21</td>
<td>63</td>
<td>16</td>
<td>1.9</td>
</tr>
<tr>
<td>2020</td>
<td>32</td>
<td>58</td>
<td>10</td>
<td>1.5</td>
</tr>
</tbody>
</table>
Number of Radios in Household
TOTAL U.S. POPULATION

<table>
<thead>
<tr>
<th></th>
<th>ZERO</th>
<th>ONE TO THREE</th>
<th>FOUR OR MORE</th>
<th>MEAN # OF RADIOS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total 12+</td>
<td>32</td>
<td>58</td>
<td>10</td>
<td>1.5</td>
</tr>
<tr>
<td>Age 18-34</td>
<td>52</td>
<td>42</td>
<td>6</td>
<td>0.9</td>
</tr>
<tr>
<td>Age 35+</td>
<td>23</td>
<td>65</td>
<td>12</td>
<td>1.8</td>
</tr>
</tbody>
</table>

# InfiniteDial
Number of Radios in Household

TOTAL U.S. POPULATION

<table>
<thead>
<tr>
<th>ZERO</th>
<th>ONE TO THREE</th>
<th>FOUR OR MORE</th>
<th>MEAN # OF RADIOS</th>
</tr>
</thead>
<tbody>
<tr>
<td>32</td>
<td>58</td>
<td>10</td>
<td>1.5</td>
</tr>
</tbody>
</table>

Total 12+

<table>
<thead>
<tr>
<th>Own a smart speaker</th>
<th>ONE TO THREE</th>
<th>FOUR OR MORE</th>
<th>MEAN # OF RADIOS</th>
</tr>
</thead>
<tbody>
<tr>
<td>31</td>
<td>58</td>
<td>11</td>
<td>1.7</td>
</tr>
</tbody>
</table>
Radio Ownership and Smart Speaker Ownership

TOTAL U.S. POPULATION

OWN A RADIO BUT NOT A SMART SPEAKER
OWN BOTH A RADIO AND A SMART SPEAKER
OWN A SMART SPEAKER BUT NOT A RADIO
OWN NEITHER A RADIO NOR A SMART SPEAKER

2018
58
13
5
24

2020
49
19
8
24

#InfiniteDial
Voice-Operated Personal Assistant Usage

TOTAL U.S. POPULATION 12+
% USING VOICE-OPERATED PERSONAL ASSISTANTS ON DEVICE

- Smartphone: 48%
- Computer/laptop: 31%
- Smart speaker: 26%
- Tablet: 20%
- Any other device: 8%

Use any voice-operated personal assistant: 62%
Amazon Prime Subscription

TOTAL U.S. POPULATION 12+
% SUBSCRIBE TO AMAZON PRIME

2016: 22%
2017: 29%
2018: 36%
2019: 38%
2020: 42%

Estimated 118 Million
Social Media
Social Media Usage

TOTAL U.S. POPULATION 12+

% USING SOCIAL MEDIA

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

Estimated

226 Million


10 21 44 53 57 63 66 70 77 80 77 79 80

226 Million
Social Media Brand Awareness

TOTAL U.S. POPULATION 12+
% AWARE OF SOCIAL MEDIA BRAND

<table>
<thead>
<tr>
<th>Platform</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>94</td>
<td>96</td>
<td>95</td>
</tr>
<tr>
<td>Instagram</td>
<td>87</td>
<td>91</td>
<td>93</td>
</tr>
<tr>
<td>Twitter</td>
<td>87</td>
<td>90</td>
<td>92</td>
</tr>
<tr>
<td>Snapchat</td>
<td>83</td>
<td>87</td>
<td>90</td>
</tr>
<tr>
<td>Pinterest</td>
<td>69</td>
<td>72</td>
<td>70</td>
</tr>
<tr>
<td>TikTok</td>
<td>64</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LinkedIn</td>
<td>58</td>
<td>61</td>
<td>64</td>
</tr>
<tr>
<td>WhatsApp</td>
<td>54</td>
<td>59</td>
<td></td>
</tr>
</tbody>
</table>

#InfiniteDial
Social Media Brand Usage

TOTAL U.S. POPULATION 12+

% USING SOCIAL MEDIA BRAND

<table>
<thead>
<tr>
<th>Social Media Brand</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>62</td>
<td>61</td>
<td>63</td>
</tr>
<tr>
<td>Instagram</td>
<td>36</td>
<td>39</td>
<td>41</td>
</tr>
<tr>
<td>Snapchat</td>
<td>31</td>
<td>31</td>
<td>41</td>
</tr>
<tr>
<td>Pinterest</td>
<td>31</td>
<td>31</td>
<td>29</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>22</td>
<td>22</td>
<td>22</td>
</tr>
<tr>
<td>Twitter</td>
<td>19</td>
<td>21</td>
<td>21</td>
</tr>
<tr>
<td>WhatsApp</td>
<td>20</td>
<td>18</td>
<td>11</td>
</tr>
<tr>
<td>TikTok</td>
<td></td>
<td></td>
<td>11</td>
</tr>
</tbody>
</table>
Facebook Usage
TOTAL U.S. POPULATION 12+
% USING FACEBOOK

Estimated
178 Million
Facebook Usage

U.S. POPULATION

% USING FACEBOOK

<table>
<thead>
<tr>
<th>Age 12-34</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>79</td>
<td>67</td>
<td>62</td>
<td>64</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age 35-54</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>72</td>
<td>69</td>
<td>69</td>
<td>74</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age 55+</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>49</td>
<td>49</td>
<td>53</td>
<td>52</td>
</tr>
</tbody>
</table>
Social Media Brand Usage (Age 12-34)

U.S. POPULATION

% USING SOCIAL MEDIA BRAND

- **Facebook**: 64% (2018), 67% (2019), 67% (2020)
- **Instagram**: 62% (2018), 66% (2019), 68% (2020)
- **Snapchat**: 62% (2018), 62% (2019), 61% (2020)
- **Pinterest**: 32% (2018), 36% (2019)
- **LinkedIn**: 22% (2018), 22% (2019)
- **Twitter**: 29% (2018), 29% (2019)
- **WhatsApp**: 29% (2018), 29% (2019)
- **TikTok**: 25% (2018)
Social Media Brand Usage (Age 35 and older)

U.S. POPULATION

% USING SOCIAL MEDIA BRAND

- Facebook: 59% (2018), 61% (2019), 62% (2020)
- Instagram: 21% (2018), 24% (2019), 26% (2020)
- Snapchat: 13% (2018), 12% (2019), 14% (2020)
- Pinterest: 28% (2018), 30% (2019), 28% (2020)
- LinkedIn: 23% (2018), 22% (2019), 22% (2020)
- Twitter: 17% (2018), 16% (2019), 16% (2020)
- TikTok: 3% (2018), 3% (2019), 3% (2020)
Social Media Brand Used Most Often

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Facebook</th>
<th>Instagram</th>
<th>Snapchat</th>
<th>Pinterest</th>
<th>Twitter</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>65</td>
<td>7</td>
<td>4</td>
<td>5</td>
<td>4</td>
<td>15</td>
</tr>
<tr>
<td>2016</td>
<td>62</td>
<td>7</td>
<td>8</td>
<td>4</td>
<td>5</td>
<td>14</td>
</tr>
<tr>
<td>2017</td>
<td>62</td>
<td>9</td>
<td>9</td>
<td>5</td>
<td>3</td>
<td>12</td>
</tr>
<tr>
<td>2018</td>
<td>57</td>
<td>12</td>
<td>14</td>
<td>5</td>
<td>5</td>
<td>7</td>
</tr>
<tr>
<td>2019</td>
<td>52</td>
<td>16</td>
<td>13</td>
<td>5</td>
<td>5</td>
<td>9</td>
</tr>
<tr>
<td>2020</td>
<td>54</td>
<td>16</td>
<td>9</td>
<td>4</td>
<td>5</td>
<td>12</td>
</tr>
</tbody>
</table>
Social Media Brand Used Most Often (Age 12-34)

BASE: U.S. SOCIAL MEDIA USERS

2015
- Facebook: 58
- Instagram: 15
- Snapchat: 9
- Pinterest: 3
- Twitter: 6
- Other: 9

2020
- Facebook: 32
- Instagram: 27
- Snapchat: 18
- Pinterest: 2
- Twitter: 8
- Other: 4
- WhatsApp: 3
- TikTok: 6

#InfiniteDial
Live Streamed Video Games

TOTAL U.S. POPULATION 12+
% SAYING YES

Currently ever watch live, streamed video games

- 2019: 15%
- 2020: 15%

Ever played a video game and streamed it live

- 2019: 7%
- 2020: 9%

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#InfiniteDial
Currently Ever Watch Live Streamed Video Games

TOTAL U.S. POPULATION 12+

% SAYING YES

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men</td>
<td>19</td>
<td>19</td>
</tr>
<tr>
<td>Women</td>
<td>11</td>
<td>11</td>
</tr>
</tbody>
</table>

#InfiniteDial
Currently Ever Watch Live Streamed Video Games

TOTAL U.S. POPULATION 12+

% SAYING YES

<table>
<thead>
<tr>
<th>Age</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age 12-34</td>
<td>29</td>
<td>26</td>
</tr>
<tr>
<td>Age 35-54</td>
<td>10</td>
<td>11</td>
</tr>
<tr>
<td>Age 55+</td>
<td>3</td>
<td>6</td>
</tr>
</tbody>
</table>

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Ever Played a Video Game and Streamed It Live

TOTAL U.S. POPULATION 12+

% SAYING YES

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men</td>
<td>10</td>
<td>12</td>
</tr>
<tr>
<td>Women</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>
Ever Played a Video Game and Streamed It Live

TOTAL U.S. POPULATION 12+

% SAYING YES

- Age 12-34: 13 (2019) vs. 16 (2020)
- Age 35-54: 5 (2019) vs. 6 (2020)
- Age 55+: 2 (2019) vs. 3 (2020)
Online Audio
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

192 Million


#InfiniteDial
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

<table>
<thead>
<tr>
<th>Age 12-34</th>
<th>Age 35-54</th>
<th>Age 55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>2019</td>
<td>2020</td>
</tr>
<tr>
<td>85</td>
<td>69</td>
<td>33</td>
</tr>
<tr>
<td>87</td>
<td>70</td>
<td>40</td>
</tr>
<tr>
<td>86</td>
<td>76</td>
<td>42</td>
</tr>
</tbody>
</table>

#InfiniteDial
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
169 Million

2000 '01 '02 '03 '04 '05 '06 '07 '08 '09 '10 '11 '12 '13 '14 '15 '16 '17 '18 '19 2020

2 5 6 8 8 8 12 12 13 17 17 22 29 33 36 44 50 53 57 60 60

THE INFINITE DIAL 2020

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#InfiniteDial
Average Time Spent Listening to Online Audio

BASE: U.S. AGE 12+ WEEKLY ONLINE AUDIO LISTENERS
HOURS:MINUTES IN LAST WEEK

2008: 6:13
2009: 6:31
2010: 8:02
2011: 9:17
2012: 9:46
2013: 11:56
2014: 13:19
2015: 12:53
2016: 12:08
2017: 14:39
2018: 13:40
2019: 16:43
2020: 15:12

THE INFINITE DIAL®2020

#InfiniteDial
Audio Brands
Audio Brand Awareness

TOTAL U.S. POPULATION 12+

% AWARE OF AUDIO BRAND

- Pandora: 85%
- iHeartRadio: 73%
- Spotify: 72%
- Apple Music: 71%
- Amazon Music: 68%
- Google Play: 63%
- Napster: 42%
- SoundCloud: 41%
- NPR One: 20%
- Radio.com: 18%
- TuneIn Radio: 16%
- Tidal: 12%
- LiveXLive, formerly Slacker: 11%
- AccuRadio: 7%
- Deezer: 7%
Audio Brands Listened to in Last Month

TOTAL U.S. POPULATION 12+
% LISTENED TO AUDIO BRAND IN LAST MONTH

- Pandora: 25%
- Spotify: 25%
- Amazon Music: 14%
- Apple Music: 12%
- iHeartRadio: 11%
- Google Play: 9%
- SoundCloud: 8%
Audio Brands Listened to in Last Month

TOTAL U.S. POPULATION 12+

% LISTENED TO AUDIO BRAND IN LAST MONTH

- Pandora: 31% (2018), 30% (2019), 25% (2020)
- Spotify: 20% (2018), 24% (2019), 25% (2020)
- Amazon Music: 9% (2018), 12% (2019), 14% (2020)
- Apple Music: 10% (2018), 12% (2019), 12% (2020)
- SoundCloud: 8% (2018), 9% (2019), 11% (2020)
Audio Brand Listened to in Last Month (Age 12-34)

U.S. POPULATION

% LISTENED TO AUDIO BRAND IN LAST MONTH

- Pandora: 2018 - 8%, 2019 - 10%, 2020 - 15%
- Amazon Music: 2018 - 10%, 2019 - 19%, 2020 - 14%
- Apple Music: 2018 - 20%, 2019 - 21%
- iHeartRadio: 2018 - 12%, 2019 - 10%, 2020 - 10%
- Google Play: 2018 - 9%, 2019 - 10%, 2020 - 18%
- SoundCloud: 2018 - 17%, 2019 - 23%
Audio Brand Listened to in Last Month (Age 35-54)

U.S. POPULATION

% LISTENED TO AUDIO BRAND IN LAST MONTH

- Pandora: 35% (2018), 37% (2019), 35% (2020)
- Spotify: 14% (2018), 18% (2019), 20% (2020)
- Amazon Music: 13% (2018), 16% (2019), 20% (2020)
- Google Play: 8% (2018), 8% (2019), 10% (2020)
- SoundCloud: 5% (2018), 6% (2019), 4% (2020)

#InfiniteDial
Audio Brands Listened to in Last Week

TOTAL U.S. POPULATION 12+

% LISTENED TO AUDIO BRAND IN LAST WEEK

- Spotify: 22%
- Pandora: 18%
- Apple Music: 10%
- Amazon Music: 10%
- iHeartRadio: 8%
- Google Play: 6%
Audio Brands Listened to in Last Week

TOTAL U.S. POPULATION 12+
% LISTENED TO AUDIO BRAND IN LAST WEEK

- Spotify: 16% (2018), 22% (2019), 20% (2020)
- Pandora: 18% (2018), 22% (2019), 23% (2020)
- Amazon Music: 6% (2018), 9% (2019), 10% (2020)
- iHeartRadio: 7% (2018), 8% (2019), 8% (2020)
- Google Play: 5% (2018), 5% (2019), 6% (2020)
Pandora/SoundCloud Awareness and Usage

TOTAL U.S. POPULATION 12+

% SAYING YES

- **Aware of Pandora or SoundCloud**: 88%
- **Listen to Pandora or SoundCloud in last month**: 31%
- **Listen to Pandora or SoundCloud in last week**: 21%
### Audio Brand Used Most Often

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

<table>
<thead>
<tr>
<th>Audio Brand Used Most Often</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spotify</td>
<td>28</td>
</tr>
<tr>
<td>Pandora</td>
<td>24</td>
</tr>
<tr>
<td>Apple Music</td>
<td>14</td>
</tr>
<tr>
<td>iHeart Radio</td>
<td>8</td>
</tr>
<tr>
<td>Amazon Music</td>
<td>8</td>
</tr>
<tr>
<td>Google Play</td>
<td>7</td>
</tr>
<tr>
<td>Other</td>
<td>11</td>
</tr>
</tbody>
</table>
# Audio Brand Used Most Often

**Base:** U.S. Age 12+ and currently ever use any audio brand

## Total

<table>
<thead>
<tr>
<th>SPOTIFY</th>
<th>PANDORA</th>
<th>APPLE MUSIC</th>
<th>IHEART MUSIC</th>
<th>AMAZON MUSIC</th>
<th>GOOGLE PLAY</th>
<th>OTHER</th>
</tr>
</thead>
<tbody>
<tr>
<td>28</td>
<td>24</td>
<td>14</td>
<td>8</td>
<td>8</td>
<td>7</td>
<td>11</td>
</tr>
</tbody>
</table>
#Audio Brand Used Most Often

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

<table>
<thead>
<tr>
<th></th>
<th>SPOTIFY</th>
<th>PANDORA</th>
<th>APPLE MUSIC</th>
<th>IHEART MUSIC</th>
<th>AMAZON MUSIC</th>
<th>GOOGLE PLAY</th>
<th>OTHER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>28</td>
<td>24</td>
<td>14</td>
<td>8</td>
<td>8</td>
<td>7</td>
<td>11</td>
</tr>
<tr>
<td>Own a smart speaker</td>
<td>28</td>
<td>18</td>
<td>15</td>
<td>6</td>
<td>15</td>
<td>7</td>
<td>11</td>
</tr>
</tbody>
</table>
In-Car Media
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

- AM/FM radio: 82% (81%), 45% (45%), 43% (41%), 28% (28%), 22% (24%)
- Owned digital music: 81% (81%), 48% (49%), 43% (41%), 28% (28%), 22% (24%)
- CD player: 81% (81%), 49% (49%), 43% (41%), 28% (28%), 22% (24%)
- Online radio: 81% (81%), 33% (33%), 28% (28%), 26% (28%), 21% (22%)
- Podcasts: 81% (81%), 27% (28%), 23% (26%), 22% (24%), 21% (22%)
- SiriusXM: 82% (81%), 27% (28%), 23% (26%), 22% (24%), 21% (22%)
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

<table>
<thead>
<tr>
<th>Year</th>
<th>AM/FM Radio</th>
<th>Owned Music</th>
<th>SiriusXM</th>
<th>Online Audio</th>
<th>Podcasts</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>57</td>
<td>15</td>
<td>14</td>
<td>9</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>2018</td>
<td>56</td>
<td>15</td>
<td>13</td>
<td>12</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>2019</td>
<td>52</td>
<td>15</td>
<td>15</td>
<td>12</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>2020</td>
<td>50</td>
<td>20</td>
<td>12</td>
<td>11</td>
<td>4</td>
<td>3</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>6</td>
</tr>
<tr>
<td>2014</td>
<td>8</td>
</tr>
<tr>
<td>2015</td>
<td>10</td>
</tr>
<tr>
<td>2016</td>
<td>12</td>
</tr>
<tr>
<td>2017</td>
<td>12</td>
</tr>
<tr>
<td>2018</td>
<td>15</td>
</tr>
<tr>
<td>2019</td>
<td>19</td>
</tr>
<tr>
<td>2020</td>
<td>18</td>
</tr>
</tbody>
</table>
Vehicle Integrated Mobile Operating Systems

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

% HAVE SYSTEM IN PRIMARY VEHICLE

- Apple Carplay
  - 2017: 2
  - 2018: 6
  - 2019: 8
  - 2020: 9

- Android Auto
  - 2017: 2
  - 2018: 4
  - 2019: 6
  - 2020: 5
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

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>5</td>
<td>9</td>
<td>15</td>
<td>19</td>
<td>23</td>
<td>32</td>
<td>34</td>
<td>38</td>
<td>42</td>
<td>41</td>
<td>45</td>
</tr>
</tbody>
</table>
Podcasting
Podcasting Familiarity

TOTAL U.S. POPULATION 12+

% FAMILIAR WITH PODCASTING

Estimates:

- 2006: 22%
- 2007: 37%
- 2008: 37%
- 2009: 43%
- 2010: 45%
- 2011: 45%
- 2012: 46%
- 2013: 46%
- 2014: 48%
- 2015: 49%
- 2016: 55%
- 2017: 60%
- 2018: 64%
- 2019: 70%
- 2020: 75%

Estimated: 212 Million
Podcasting Listening

TOTAL U.S. POPULATION 12+
% EVER LISTENED TO A PODCAST

Estimated 155 Million
Monthly Podcast Listening

TOTAL U.S. POPULATION 12+
% LISTENED TO A PODCAST IN LAST MONTH

Estimated
104 Million
Monthly Podcast Listening

U.S. Population

% Listened to a Podcast in Last Month

<table>
<thead>
<tr>
<th>Year</th>
<th>Men</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>27</td>
<td>21</td>
</tr>
<tr>
<td>2018</td>
<td>27</td>
<td>24</td>
</tr>
<tr>
<td>2019</td>
<td>36</td>
<td>29</td>
</tr>
<tr>
<td>2020</td>
<td>39</td>
<td>36</td>
</tr>
</tbody>
</table>
Monthly Podcast Listening

U.S. POPULATION

% LISTENED TO A PODCAST IN LAST MONTH

<table>
<thead>
<tr>
<th>Age 12-34</th>
<th>Age 35-54</th>
<th>Age 55+</th>
</tr>
</thead>
</table>

THE INFINITE DIAL© 2020

#InfiniteDial
Sex of Monthly Podcast Listeners

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

U.S. POPULATION 12+

Men 51%

Women 49%

MONTHLY PODCAST CONSUMERS 12+

Men 51%

Women 49%
Age of Monthly Podcast Listeners

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

U.S. POPULATION 12+

- Age 12-34: 37%
- Age 35-54: 31%
- Age 55+: 32%

MONTHLY PODCAST CONSUMERS 12+

- Age 12-34: 48%
- Age 35-54: 32%
- Age 55+: 20%
Ethnicity of Monthly Podcast Listeners

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

**U.S. POPULATION 12+**
- White: 58%
- African-American: 13%
- Hispanic: 18%
- Asian: 4%
- Other: 7%

**MONTHLY PODCAST CONSUMERS 12+**
- White: 63%
- African-American: 11%
- Hispanic: 11%
- Asian: 5%
- Other: 9%
Weekly Podcast Listening

TOTAL U.S. POPULATION 12+
% LISTENED TO A PODCAST IN LAST WEEK

2013: 7
2014: 8
2015: 10
2016: 13
2017: 15
2018: 17
2019: 22
2020: 24

Estimated
68 Million
Average Time Spent Listening to Podcasts

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Average Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>4:27</td>
</tr>
<tr>
<td>2016</td>
<td>4:10</td>
</tr>
<tr>
<td>2017</td>
<td>5:07</td>
</tr>
<tr>
<td>2018</td>
<td>6:37</td>
</tr>
<tr>
<td>2019</td>
<td>6:29</td>
</tr>
<tr>
<td>2020</td>
<td>6:39</td>
</tr>
</tbody>
</table>
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.
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