The Infinite Dial 2021

#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 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.
Smartphone Ownership

TOTAL U.S. POPULATION 12+
% OWNING A SMARTPHONE

Estimated
250 Million

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Smart Speaker Ownership

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

2017: 7%
2018: 18%
2019: 23%
2020: 27%
2021: 33%

Estimated
94 Million
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+
% OWNING SMART SPEAKER

- Amazon Alexa: 24%
- Google Home: 13%
- 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>
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<td>67</td>
<td>22</td>
<td>11</td>
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<tr>
<td>2020</td>
<td>45</td>
<td>23</td>
<td>32</td>
<td>2.2</td>
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</table>
Audiobook Listening

TOTAL U.S. POPULATION 12+

% EVER LISTENED TO AN AUDIOBOOK

- 2015: 43%
- 2016: 43%
- 2017: 45%
- 2018: 44%
- 2019: 50%
- 2020: 45%
- 2021: 46%

Estimated 131 Million
Live Streamed Video Games

TOTAL U.S. POPULATION 12+

% SAYING YES

Currently ever watch live, streamed video games on services such as Twitch, YouTube Live, Facebook Live, or Mixer

- 2019: 15
- 2020: 15
- 2021: 20

Ever played a video game and streamed it live on services such as Twitch, YouTube Live, Facebook Live, or Mixer

- 2019: 7
- 2020: 9
- 2021: 10
Currently Ever Watch Live Streamed Video Games

Total U.S. Population 12+

% Saying Yes

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Men</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>19</td>
<td>11</td>
</tr>
<tr>
<td>2020</td>
<td>19</td>
<td>11</td>
</tr>
<tr>
<td>2021</td>
<td>23</td>
<td>17</td>
</tr>
</tbody>
</table>
Currently Ever Watch Live Streamed Video Games

TOTAL U.S. POPULATION 12+
% SAYING YES

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

- **2019**
  - Age 12-34: 29
  - Age 35-54: 10
  - Age 55+: 3

- **2020**
  - Age 12-34: 26
  - Age 35-54: 11
  - Age 55+: 6

- **2021**
  - Age 12-34: 38
  - Age 35-54: 16
  - Age 55+: 4

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Ever Played a Video Game and Streamed it Live

TOTAL U.S. POPULATION 12+
% SAYING YES

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Men</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>10</td>
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<tr>
<td>2021</td>
<td>13</td>
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</table>
Ever Played a Video Game and Streamed It Live

TOTAL U.S. POPULATION 12+

% SAYING YES

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

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
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</thead>
<tbody>
<tr>
<td>Age 12-34</td>
<td>13</td>
<td>16</td>
<td>21</td>
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<tr>
<td>Age 35-54</td>
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</tr>
<tr>
<td>Age 55+</td>
<td>2</td>
<td>3</td>
<td>2</td>
</tr>
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</table>

#InfiniteDial
Social Media
Social Media Usage

TOTAL U.S. POPULATION 12+

% USING SOCIAL MEDIA


10 21 44 53 57 63 66 70 77 80 77 79 80 82

Estimated 233 Million

*2008-2012: EVER USE FACEBOOK, TWITTER, OR LINKEDIN
Social Media Brand Awareness

TOTAL U.S. POPULATION 12+

% AWARE OF SOCIAL MEDIA BRAND

Facebook: 93
Instagram: 89
Twitter: 88
Snapchat: 86
TikTok: 86
Pinterest: 72
LinkedIn: 65
WhatsApp: 62
Parler: 40
Social Media Brand Usage

TOTAL U.S. POPULATION 12+

% USING SOCIAL MEDIA BRAND

- Facebook: 61
- Instagram: 43
- Pinterest: 31
- Snapchat: 28
- Twitter: 23
- TikTok: 23
- LinkedIn: 22
- WhatsApp: 21
- Parler: 5
Social Media Brand Usage (Age 35-54)

U.S. POPULATION

% USING SOCIAL MEDIA BRAND

<table>
<thead>
<tr>
<th>Social Media Brand</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
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<tbody>
<tr>
<td>Facebook</td>
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<tr>
<td>Instagram</td>
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<td>Pinterest</td>
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<td>TikTok</td>
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<tr>
<td>LinkedIn</td>
<td>31</td>
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<tr>
<td>WhatsApp</td>
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<td>Parler</td>
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THE INFINITE DIAL'2021

#InfiniteDial
Social Media Brand Usage (Age 55 and older)

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<th>Social Media Brand</th>
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<td>17</td>
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<tr>
<td>Pinterest</td>
<td>18</td>
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<td>Twitter</td>
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<td></td>
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<tr>
<td>TikTok</td>
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<td>6</td>
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<tr>
<td>LinkedIn</td>
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<td>Parler</td>
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Social Media Brand Used Most Often

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

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<thead>
<tr>
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#InfiniteDial
Social Media Brand Used Most Often

BASE: U.S. SOCIAL MEDIA USERS

<table>
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<tr>
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<tr>
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<td>Snapchat</td>
<td>Twitter</td>
<td>Pinterest</td>
<td>Other</td>
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<td>14</td>
<td>5</td>
<td>14</td>
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*BASE: U.S. SOCIAL MEDIA USERS*
### Social Media Brand Used Most Often (Age 35-54)

**Base:** U.S. Social Media Users

<table>
<thead>
<tr>
<th>Year</th>
<th>Facebook</th>
<th>Instagram</th>
<th>Twitter</th>
<th>Pinterest</th>
<th>Snapchat</th>
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Social Media Brand Used Most Often (Age 55+)

BASE: U.S. SOCIAL MEDIA USERS

<table>
<thead>
<tr>
<th>Year</th>
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<th>Twitter</th>
<th>Pinterest</th>
<th>Other</th>
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<td>4</td>
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</tbody>
</table>

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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

% Listened to Online Audio in Last Month

Online Audio = Listening to AM/FM radio stations online and/or listening to streaming audio content available only on the internet

<table>
<thead>
<tr>
<th>Age</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age 12-34</td>
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<td>86</td>
<td>86</td>
</tr>
<tr>
<td>Age 35-54</td>
<td>70</td>
<td>76</td>
<td>72</td>
</tr>
<tr>
<td>Age 55+</td>
<td>40</td>
<td>42</td>
<td>46</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 176 Million

2000 '01 '02 '03 '04 '05 '06 '07 '08 '09 '10 '11 '12 '13 '14 '15 '16 '17 '18 '19 '20 '21

2 5 6 8 8 8 12 12 13 17 17 22 29 33 36 44 50 53 57 60 60 62

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TRITON
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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

Online Audio Brands
Online Audio Brand Awareness

TOTAL U.S. POPULATION 12+
% AWARE OF ONLINE AUDIO BRAND

- Pandora: 83%
- Spotify: 76%
- iHeartRadio: 72%
- Apple Music: 72%
- Amazon Music: 70%
- Google Play, now known as YouTube Music: 68%
- SoundCloud: 46%
- NPR One: 25%
- Radio.com: 16%
- TuneIn Radio: 16%
- Tidal: 12%
- LiveXLive, formerly Slacker: 8%
- AccuRadio: 5%

#InfiniteDial
Online Audio Brands Listened to in Last Month

TOTAL U.S. POPULATION 12+

% LISTENED TO ONLINE AUDIO BRAND IN LAST MONTH

- Spotify: 29%
- Pandora: 20%
- Google Play, now known as YouTube Music: 16%
- Amazon Music: 14%
- Apple Music: 12%
- iHeartRadio: 10%
- SoundCloud: 8%
Online Audio Brands Listened to in Last Week

<table>
<thead>
<tr>
<th>Brand</th>
<th>% Listened</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spotify</td>
<td>25</td>
</tr>
<tr>
<td>Pandora</td>
<td>14</td>
</tr>
<tr>
<td>Google Play, now known as YouTube Music</td>
<td>14</td>
</tr>
<tr>
<td>Amazon Music</td>
<td>10</td>
</tr>
<tr>
<td>Apple Music</td>
<td>10</td>
</tr>
<tr>
<td>iHeartRadio</td>
<td>7</td>
</tr>
<tr>
<td>SoundCloud</td>
<td>5</td>
</tr>
</tbody>
</table>
Online Audio Brand Used Most Often

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

<table>
<thead>
<tr>
<th>Brand</th>
<th>Use</th>
</tr>
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<tbody>
<tr>
<td><strong>Total</strong></td>
<td>99</td>
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<tr>
<td><strong>SPOTIFY</strong></td>
<td>31</td>
</tr>
<tr>
<td><strong>PANDORA</strong></td>
<td>18</td>
</tr>
<tr>
<td><strong>GOOGLE PLAY/ YOUTUBE MUSIC</strong></td>
<td>14</td>
</tr>
<tr>
<td><strong>APPLE MUSIC</strong></td>
<td>11</td>
</tr>
<tr>
<td><strong>AMAZON MUSIC</strong></td>
<td>10</td>
</tr>
<tr>
<td><strong>iHEART RADIO</strong></td>
<td>7</td>
</tr>
<tr>
<td><strong>OTHER</strong></td>
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</tr>
</tbody>
</table>

#InfiniteDial
Online Audio Brand Used Most Often

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

Total

- SPOTIFY: 31
- PANDORA: 18
- GOOGLE PLAY/ YOUTUBE MUSIC: 14
- APPLE MUSIC: 11
- AMAZON MUSIC: 10
- IHEART RADIO: 7
- OTHER: 9

Own an Amazon Alexa device

- SPOTIFY: 28
- PANDORA: 17
- GOOGLE PLAY/ YOUTUBE MUSIC: 9
- APPLE MUSIC: 13
- AMAZON MUSIC: 21
- IHEART RADIO: 6
- OTHER: 6
Online Audio Brand Used Most Often

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

<table>
<thead>
<tr>
<th></th>
<th>SPOTIFY</th>
<th>PANDORA</th>
<th>GOOGLE PLAY/ YOUTUBE MUSIC</th>
<th>APPLE MUSIC</th>
<th>AMAZON MUSIC</th>
<th>IHEART RADIO</th>
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<tbody>
<tr>
<td>Total</td>
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<td>14</td>
<td>11</td>
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<td>7</td>
<td>9</td>
</tr>
<tr>
<td>Own an Amazon Alexa device</td>
<td>28</td>
<td>17</td>
<td>9</td>
<td>13</td>
<td>21</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Own a Google Nest device</td>
<td>50</td>
<td></td>
<td>16</td>
<td>11</td>
<td>5</td>
<td>5</td>
<td>6</td>
</tr>
</tbody>
</table>
Frequency of Listening to Audio with Other People

TOTAL U.S. POPULATION 12+

- Sometimes: 27%
- Frequently: 24%
- Hardly ever: 28%
- Never: 21%
Frequency of Listening to Audio with Other People

TOTAL U.S. POPULATION 12+

<table>
<thead>
<tr>
<th></th>
<th>Frequently</th>
<th>Sometimes</th>
<th>Hardly Ever</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>24</td>
<td>27</td>
<td>28</td>
<td>21</td>
</tr>
<tr>
<td>Age 12-34</td>
<td>32</td>
<td>37</td>
<td>21</td>
<td>10</td>
</tr>
<tr>
<td>Age 35-54</td>
<td>29</td>
<td>24</td>
<td>29</td>
<td>18</td>
</tr>
<tr>
<td>Age 55+</td>
<td>13</td>
<td>18</td>
<td>33</td>
<td>36</td>
</tr>
</tbody>
</table>

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In-Car Media
Driven/Ridden in Car in Last Month

BASE: U.S. AGE 18+

% DRIVING OR RIDING IN CAR/VEHICLE IN LAST MONTH

- 2016: 88%
- 2017: 90%
- 2018: 88%
- 2019: 89%
- 2020: 87%
- 2021: 83%

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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; 83%

% USING AUDIO SOURCE IN CAR

- AM/FM radio: 81% (2019), 81% (2020), 75% (2021)
- Owned digital music: 45% (2019), 48% (2020), 48% (2021)
- CD player: 35% (2019), 43% (2020), 35% (2021)
- Online audio: 28% (2019), 33% (2020), 33% (2021)
- SiriusXM: 21% (2019), 24% (2020), 21% (2021)
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

- 2013: 6
- 2014: 8
- 2015: 10
- 2016: 12
- 2017: 12
- 2018: 15
- 2019: 19
- 2020: 18
- 2021: 20
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

Apple CarPlay: 10
Android Auto: 8
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>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>5</td>
</tr>
<tr>
<td>2011</td>
<td>9</td>
</tr>
<tr>
<td>2012</td>
<td>15</td>
</tr>
<tr>
<td>2013</td>
<td>19</td>
</tr>
<tr>
<td>2014</td>
<td>23</td>
</tr>
<tr>
<td>2015</td>
<td>32</td>
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<tr>
<td>2016</td>
<td>34</td>
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<td>2017</td>
<td>38</td>
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<tr>
<td>2018</td>
<td>42</td>
</tr>
<tr>
<td>2019</td>
<td>41</td>
</tr>
<tr>
<td>2020</td>
<td>45</td>
</tr>
<tr>
<td>2021</td>
<td>50</td>
</tr>
</tbody>
</table>
Podcasting
Podcasting Familiarity

TOTAL U.S. POPULATION 12+
% FAMILIAR WITH PODCASTING

Estimated 222 Million

2006  37  22
2007  37  22
2008  43  22
2009  45  22
2010  45  22
2011  46  22
2012  46  22
2013  48  22
2014  49  22
2015  55  22
2016  60  22
2017  64  22
2018  70  22
2019  75  22
2020  78  22
2021  80  22
Podcasting Listening

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

Estimated
162 Million

2006 11
2007 13
2008 18
2009 22
2010 23
2011 25
2012 29
2013 27
2014 30
2015 33
2016 36
2017 40
2018 44
2019 51
2020 55
2021 57

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Monthly Podcast Listening

Total U.S. Population 12+

% listened to a podcast in last month

<table>
<thead>
<tr>
<th>Year</th>
<th>% Podcast Listening</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>9</td>
</tr>
<tr>
<td>2009</td>
<td>11</td>
</tr>
<tr>
<td>2010</td>
<td>12</td>
</tr>
<tr>
<td>2011</td>
<td>12</td>
</tr>
<tr>
<td>2012</td>
<td>14</td>
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<tr>
<td>2013</td>
<td>12</td>
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<td>2014</td>
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<td>2015</td>
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<td>2016</td>
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<td>2017</td>
<td>24</td>
</tr>
<tr>
<td>2018</td>
<td>26</td>
</tr>
<tr>
<td>2019</td>
<td>32</td>
</tr>
<tr>
<td>2020</td>
<td>37</td>
</tr>
<tr>
<td>2021</td>
<td>41</td>
</tr>
</tbody>
</table>

Estimated

116 Million
Monthly Podcast Listening

U.S. Population

%Listened to a Podcast in Last Month

- 2018
- 2019
- 2020
- 2021

Men:
- 2018: 27%
- 2019: 36%
- 2020: 39%
- 2021: 43%

Women:
- 2018: 24%
- 2019: 29%
- 2020: 36%
- 2021: 39%

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Monthly Podcast Listening

U.S. POPULATION

% LISTENED TO A PODCAST IN LAST MONTH

Age 12-34:
- 2018: 34%
- 2019: 42%
- 2020: 49%
- 2021: 56%

Age 35-54:
- 2018: 29%
- 2019: 36%
- 2020: 40%
- 2021: 39%

Age 55+:
- 2018: 13%
- 2019: 17%
- 2020: 22%
- 2021: 26%
Gender of Monthly Podcast Listeners

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

U.S. POPULATION 12+

- Men: 48%
- Women: 49%
- Non-binary/Other: 2%

MONTHLY PODCAST CONSUMERS 12+

- Men: 51%
- Women: 46%
- Non-binary/Other: 3%
Age of Monthly Podcast Listeners

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

- **2011 (EST. 30 MIL)**
  - AGE 12-34: 46% (EST. 14 MIL)
  - AGE 35-54: 40% (EST. 12 MIL)
  - AGE 55+: 14% (EST. 4 MIL)

- **2016 (EST. 57 MIL)**
  - AGE 12-34: 49% (EST. 28 MIL)
  - AGE 35-54: 34% (EST. 19 MIL)
  - AGE 55+: 17% (EST. 10 MIL)

- **2021 (EST. 116 MIL)**
  - AGE 12-34: 50% (EST. 58 MIL)
  - AGE 35-54: 29% (EST. 34 MIL)
  - AGE 55+: 21% (EST. 24 MIL)
Ethnicity of Monthly Podcast Listeners

Base: U.S. Age 12+ and Listened to Podcast in Last Month

<table>
<thead>
<tr>
<th>Year</th>
<th>White</th>
<th>African-American</th>
<th>Hispanic</th>
<th>Asian</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>68%</td>
<td>14%</td>
<td>11%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>2016</td>
<td>63%</td>
<td>16%</td>
<td>12%</td>
<td>3%</td>
<td>6%</td>
</tr>
<tr>
<td>2021</td>
<td>57%</td>
<td>13%</td>
<td>16%</td>
<td>4%</td>
<td>10%</td>
</tr>
</tbody>
</table>

#Ethnicity #PodcastListeners #TheInfiniteDial2021
Weekly Podcast Listening

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

Estimated
80 Million

2013: 7
2014: 8
2015: 10
2016: 13
2017: 15
2018: 17
2019: 22
2020: 24
2021: 28
Number of Podcasts Listened to in Last Week

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

- Three: 14%
- Two: 15%
- One: 11%
- Four or Five: 21%
- Six to Ten: 19%
- 11 or more: 19%

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.
The Infinite Dial – Australia

Moms and Media

The Infinite Dial – Canada

Coming Soon

Details to follow at www.edisonresearch.com
The Infinite Dial 2021

#InfiniteDial