



# THE INFINITE DIAL

2018

#InfiniteDial



# Study Overview

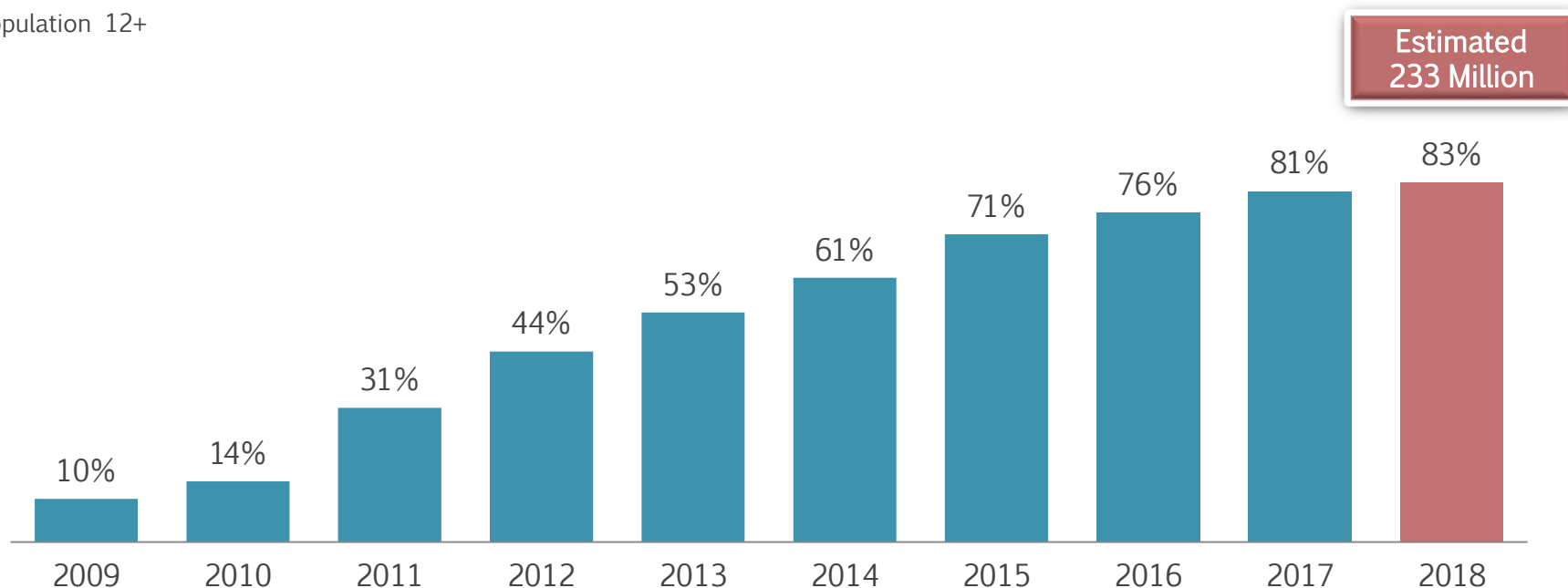
- The Infinite Dial is the longest-running survey of digital media consumer behavior in America
- The annual reports in this series have covered a wide range of digital media and topics since 1998
- For 2018, The Infinite Dial tracks and covers new research on mobile behaviors, Internet Radio, Podcasting, Social Media, Smart Speakers and more

# Study Methodology

- In January/February 2018, Edison Research conducted a national telephone survey of 2000 people aged 12 and older, using random digit dialing techniques to both cell phones and landlines
- Survey offered in both English and Spanish languages
- Data weighted to national 12+ population figures

# Smartphone Ownership

Total Population 12+

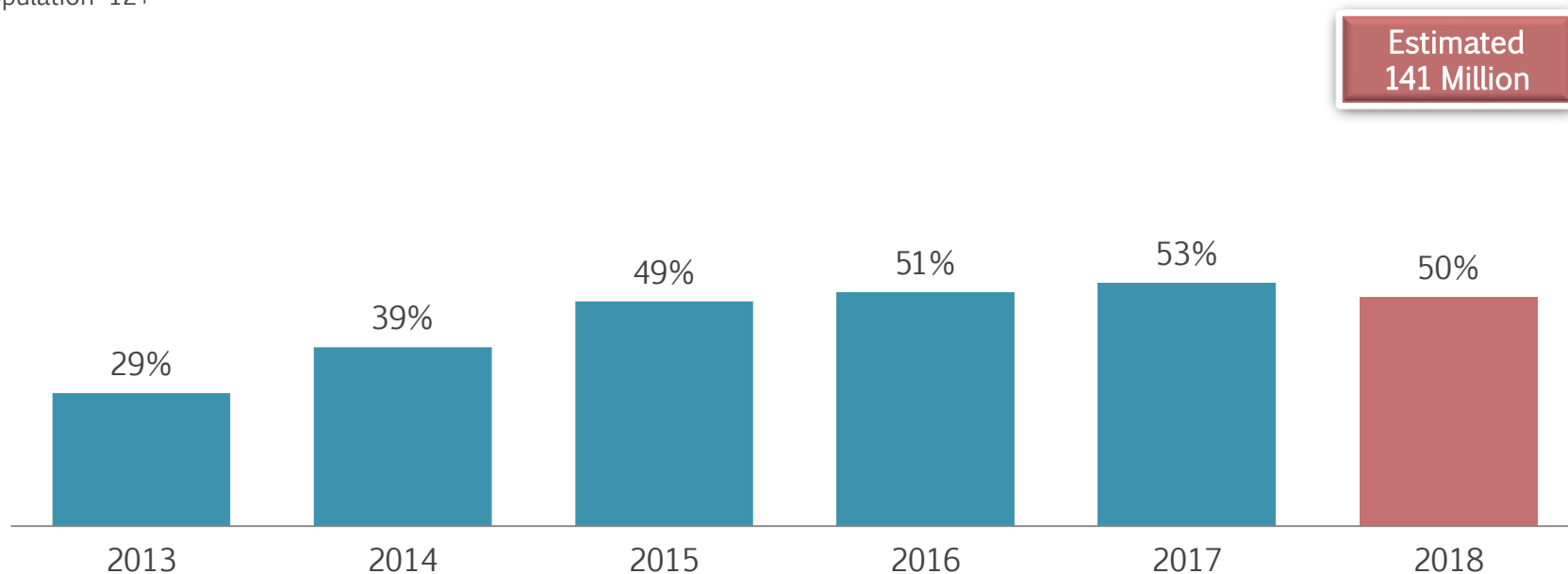




# MEDIA & TECHNOLOGY

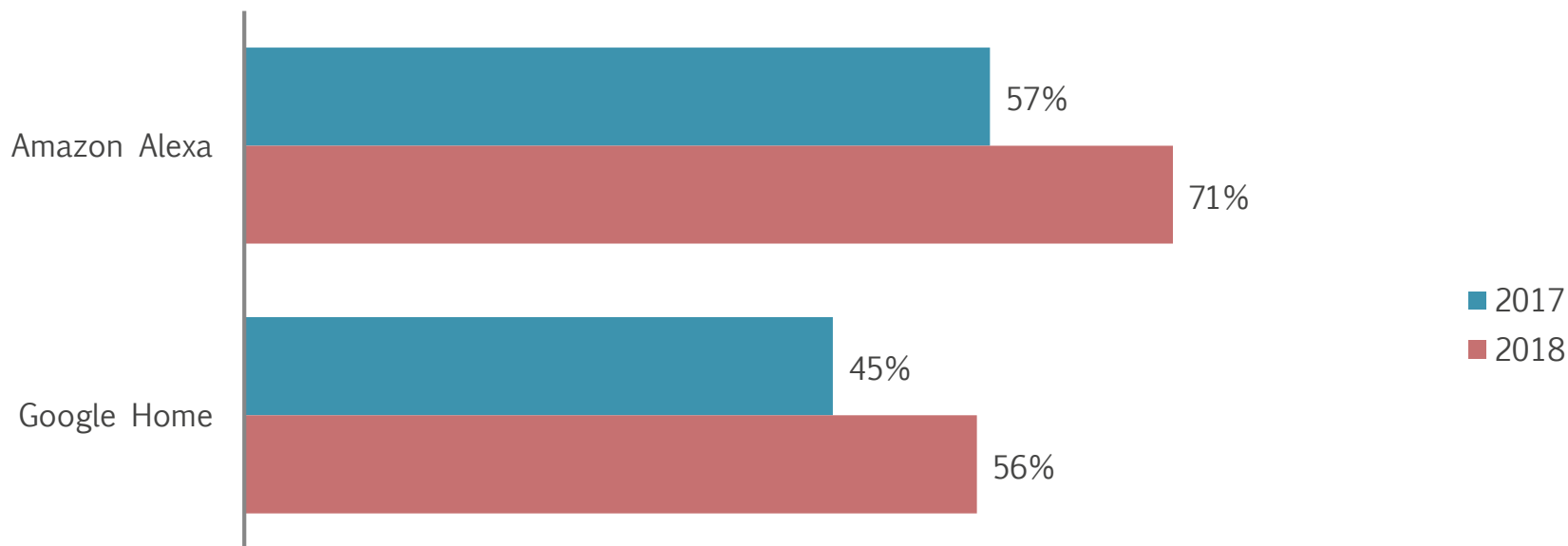
# Tablet Ownership

Total Population 12+



# Smart Speaker Awareness

Total Population 12+



# Smart Speaker Ownership

Total Population 12+

Estimated  
51 Million

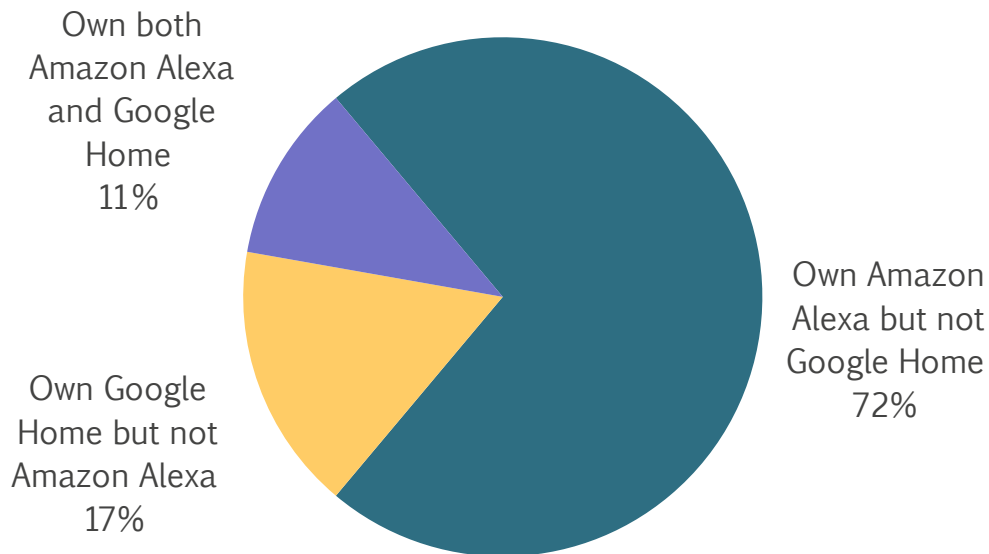


% owning either Amazon Alexa or Google Home devices



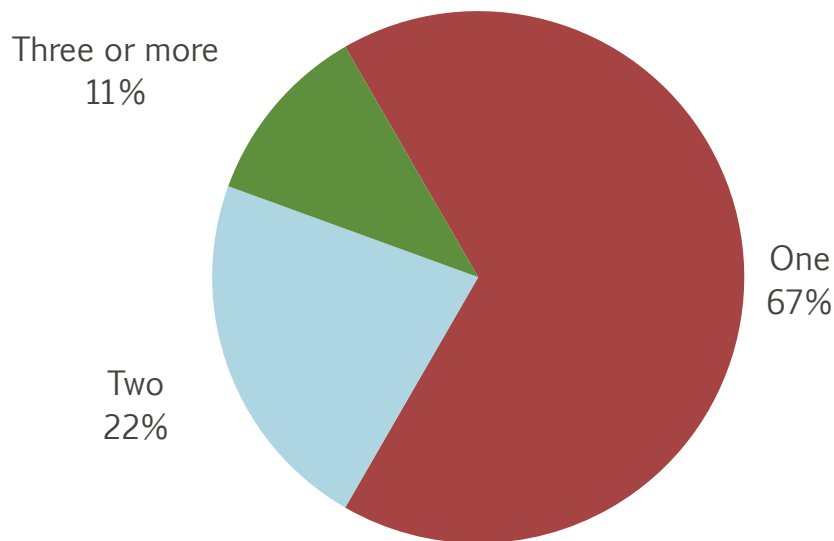
# Smart Speaker Ownership

Base: Own a Smart Speaker



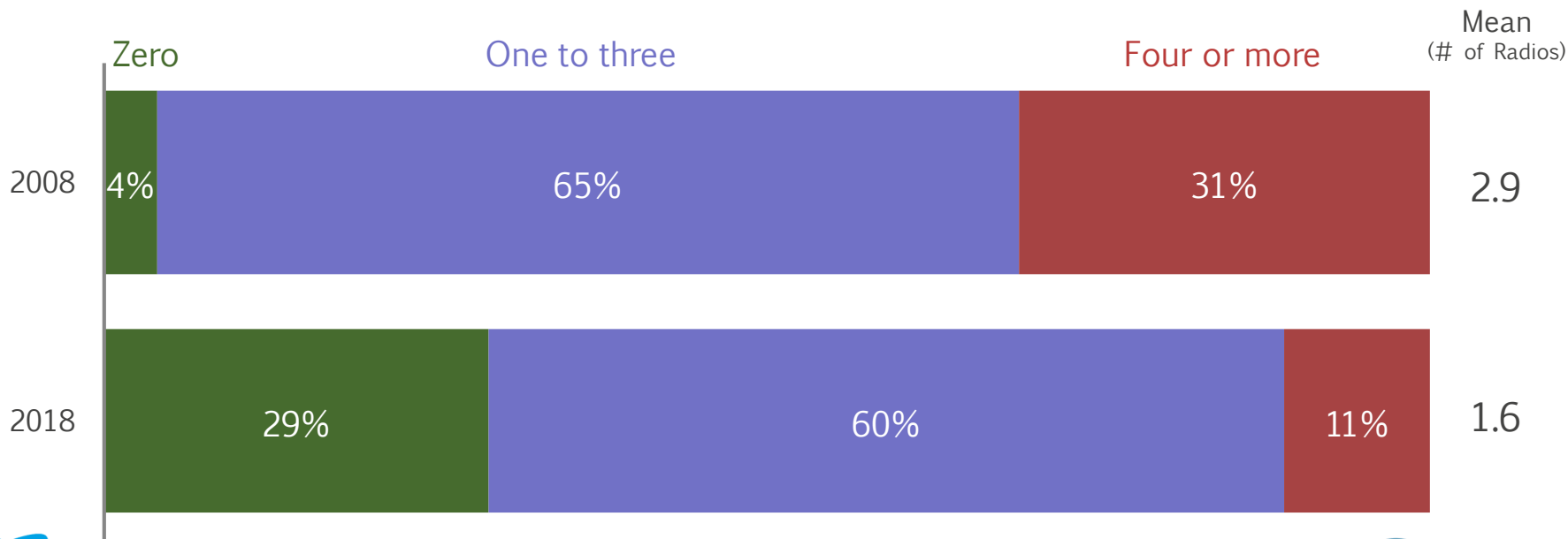
# Number of Smart Speakers in Household

Base: Own a Smart Speaker

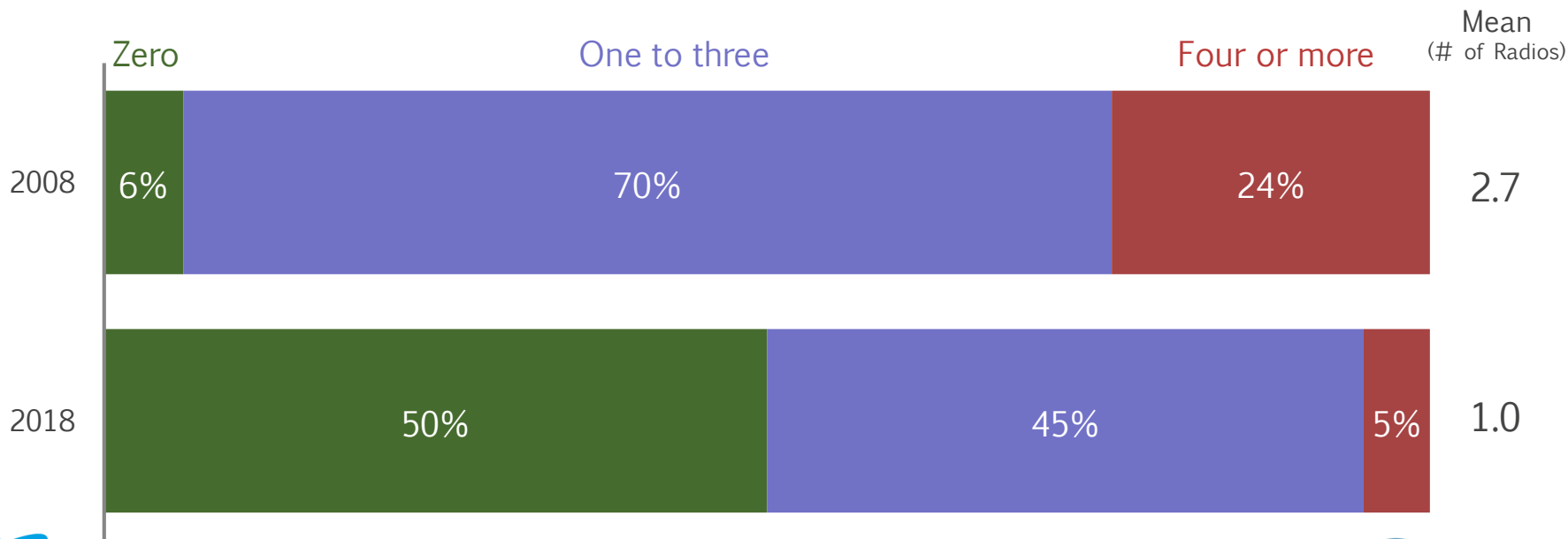


# Number of Radios Owned in Home

Total Population 12+

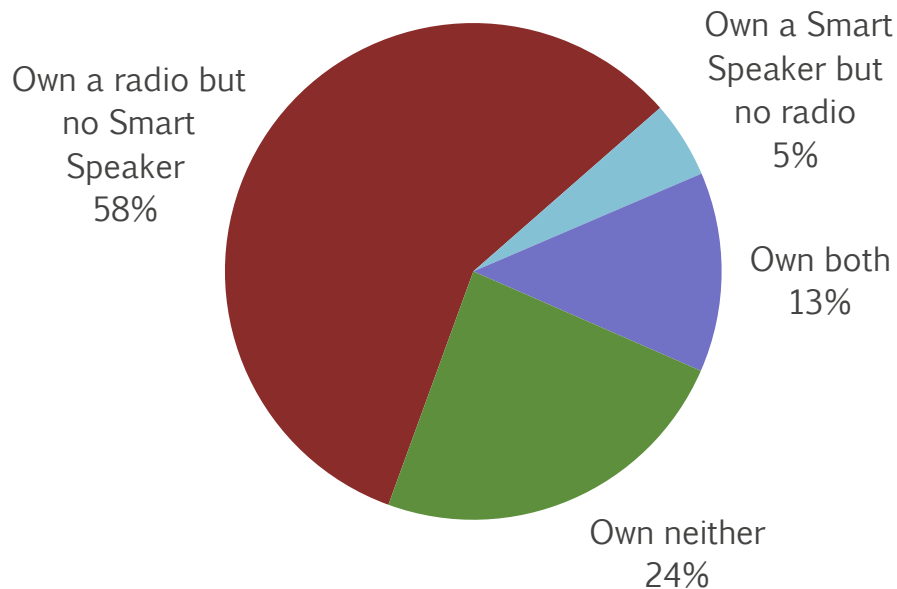


# Number of Radios Owned in Home (Age 18-34)



# Radio Ownership and Smart Speaker Ownership

Total Population 12+

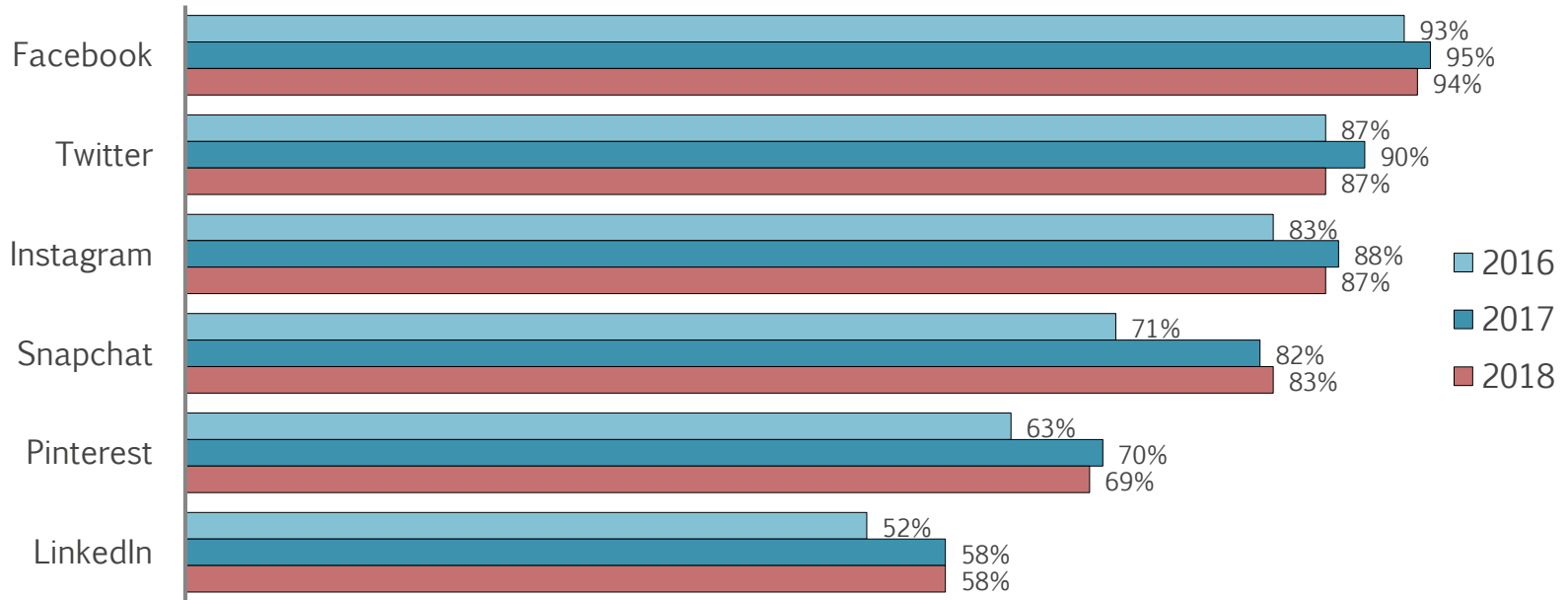




# SOCIAL MEDIA

# Social Media Brand Awareness

Total Population 12+

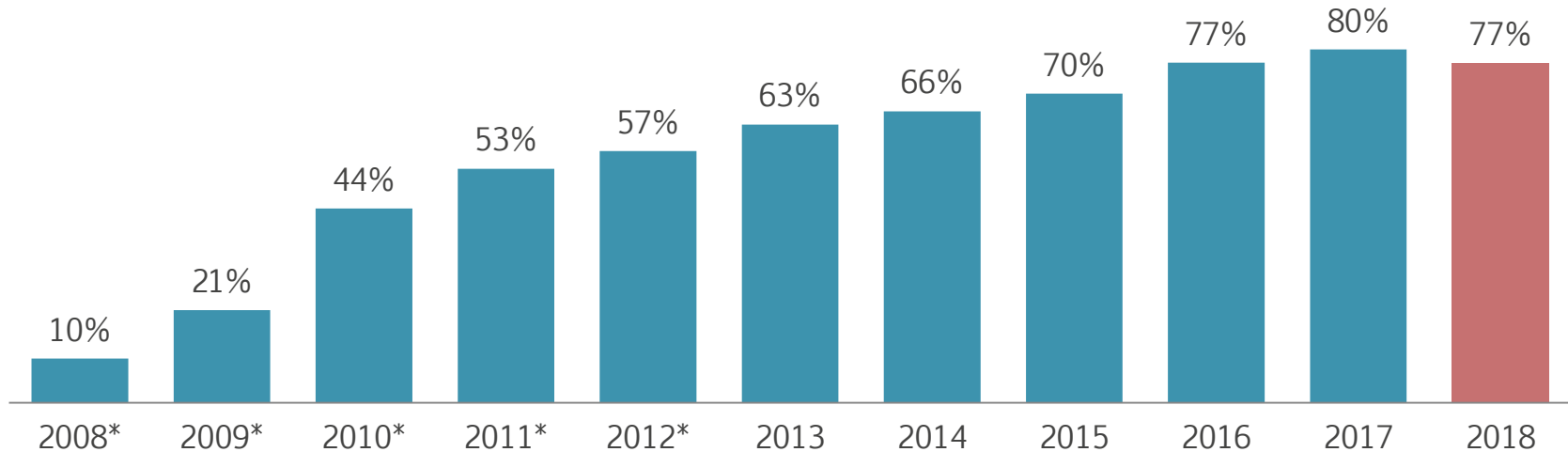


% aware of social media brand

# Social Media Usage

Estimated  
216 Million

Base: Age 12+ and currently ever use Facebook, Snapchat, Twitter, Instagram, Pinterest, or LinkedIn



\*2008-2012: Ever use Facebook, Twitter, or LinkedIn

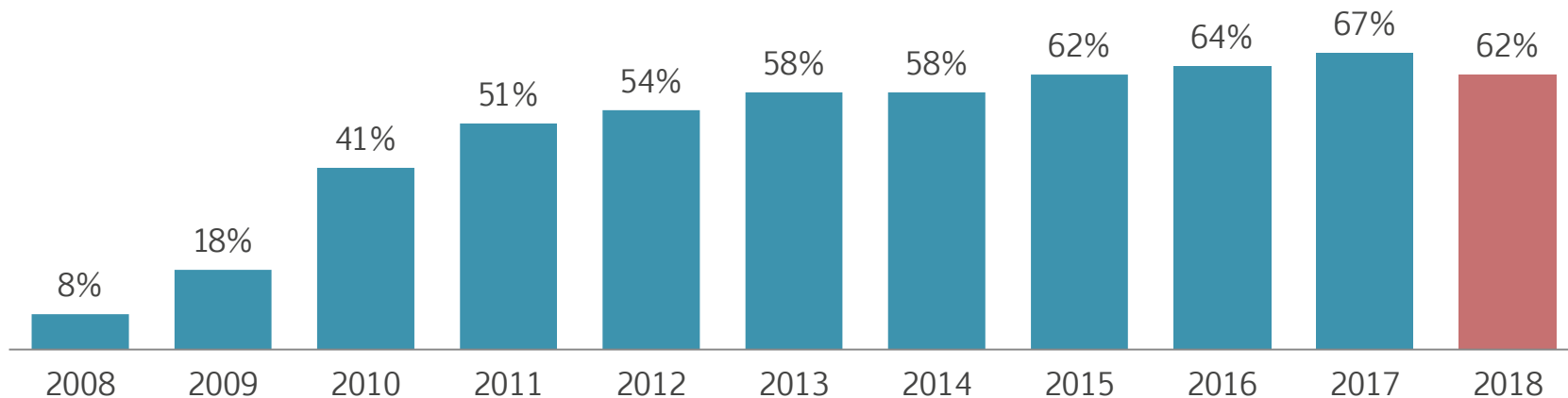
% currently ever use



# Facebook Usage

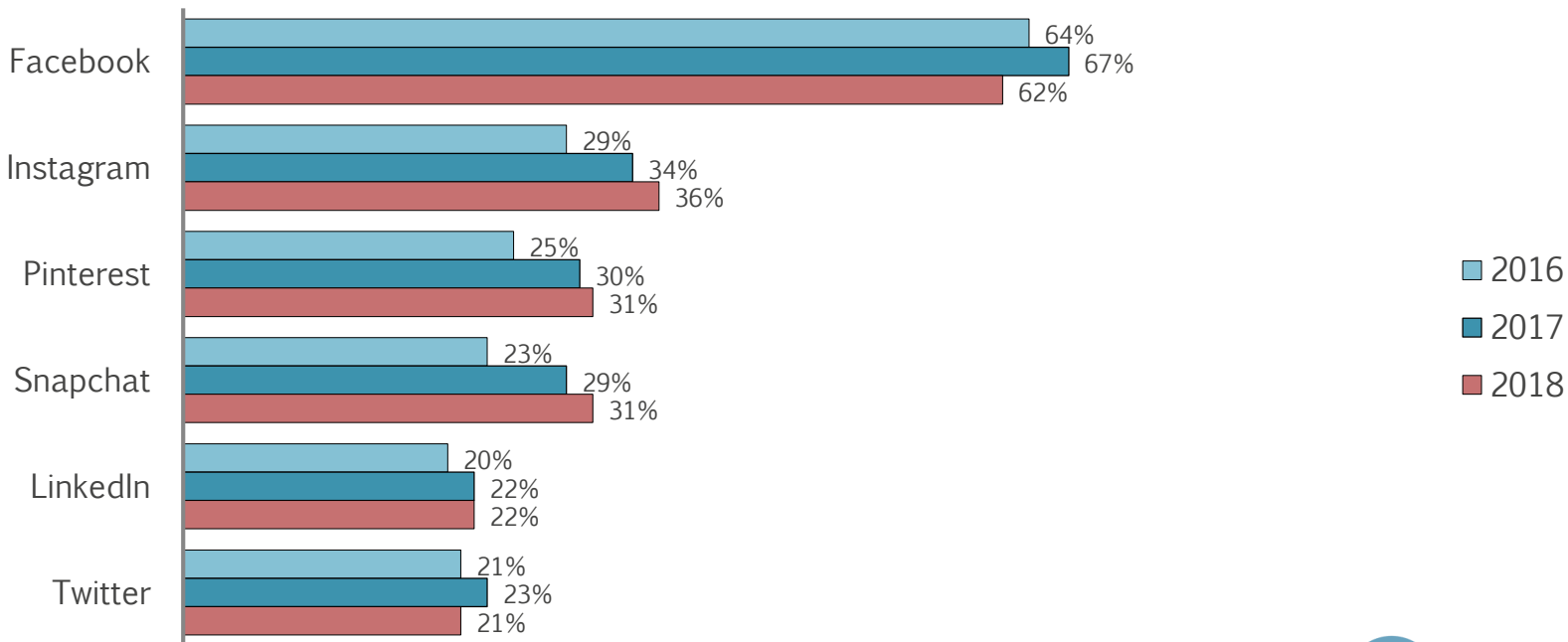
Total Population 12+

Estimated  
174 Million



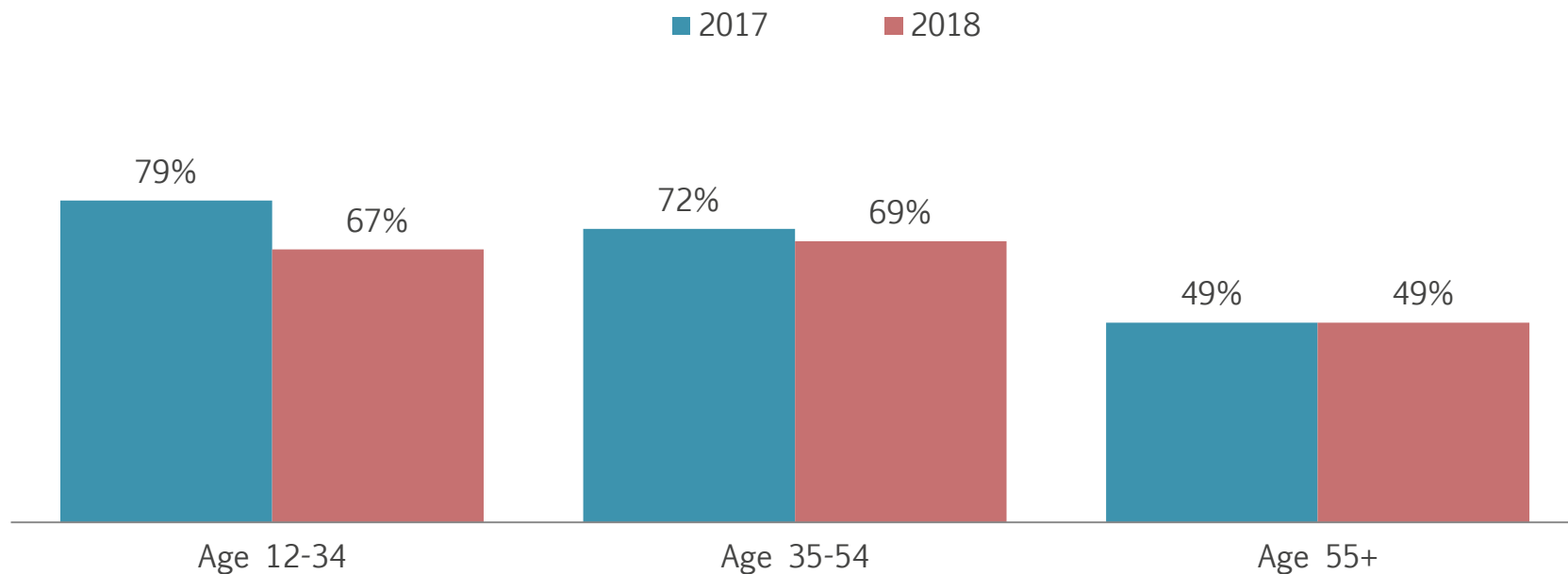
# Social Media Brand Usage

Total Population 12+



% currently ever use social media brand

# Facebook Usage

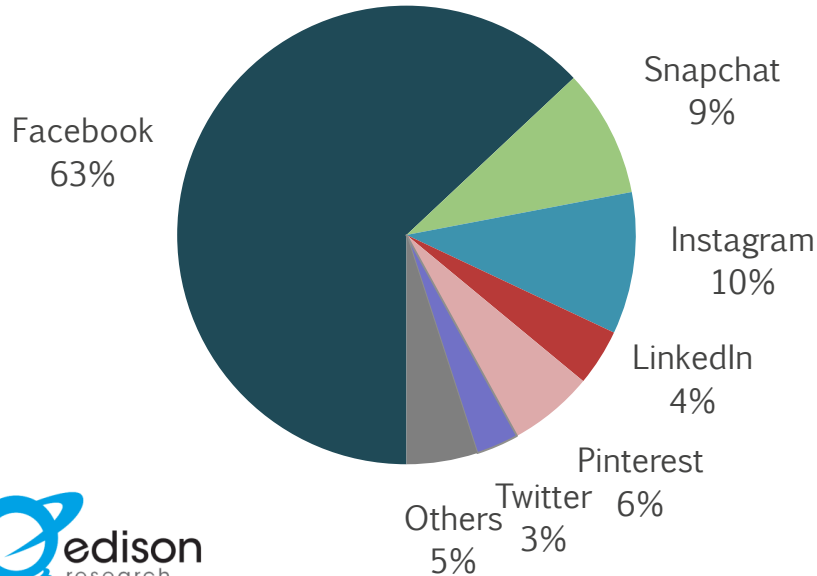


% currently ever use Facebook

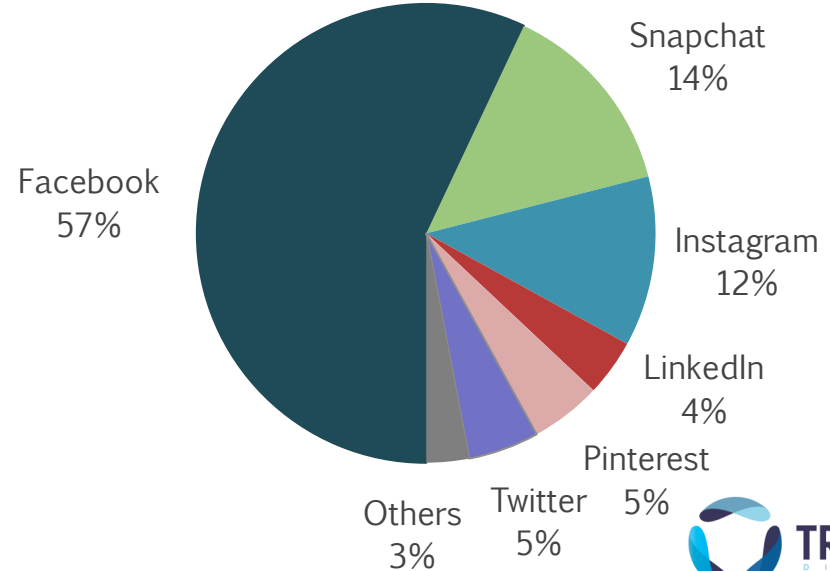
# Social Media Brand Used Most Often

Base: Age 12+ and currently ever use Facebook, Snapchat, Twitter, Instagram, Pinterest, or LinkedIn

2017



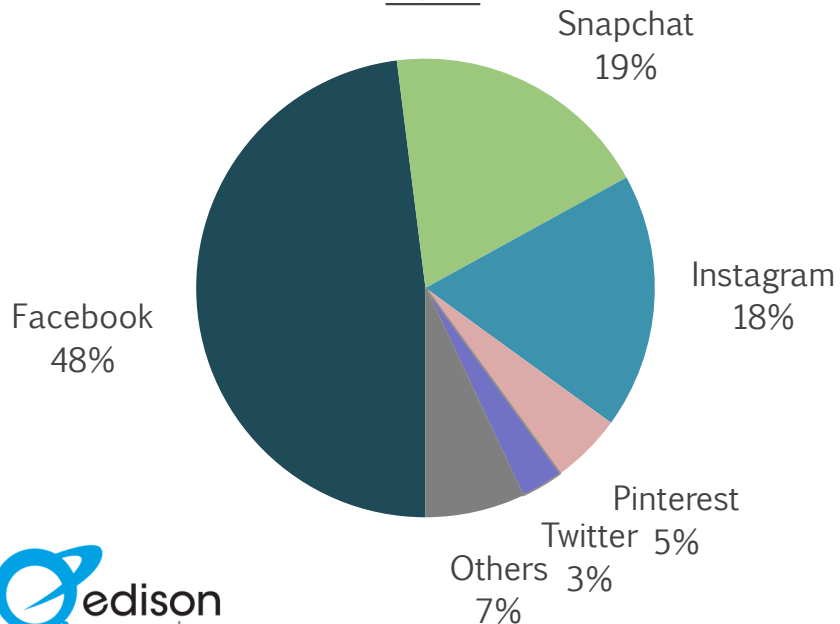
2018



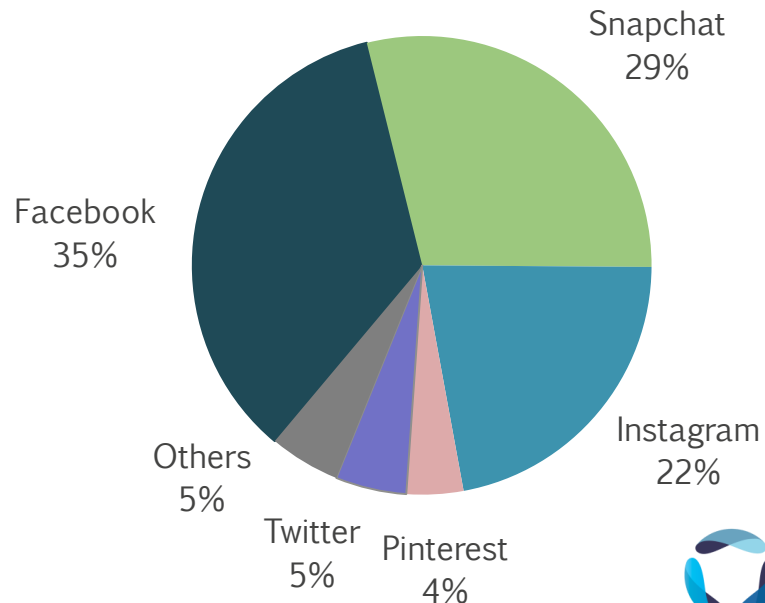
# Social Media Brand Used Most Often (Age 12-34)

Base: Currently ever use Facebook, Snapchat, Twitter, Instagram, Pinterest, or LinkedIn

2017



2018



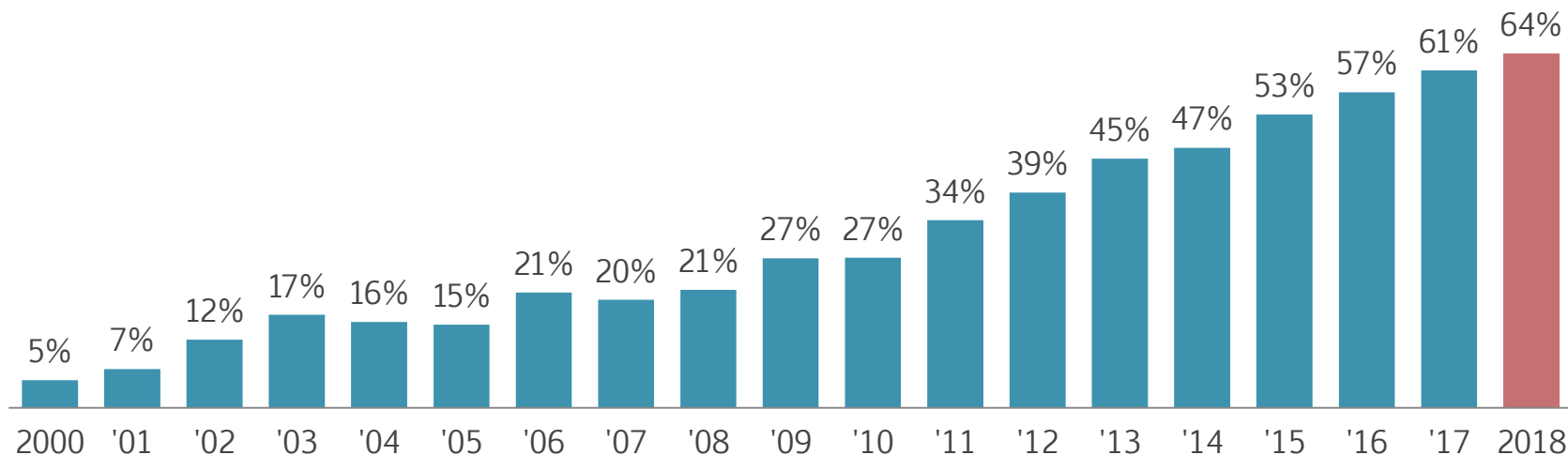


# ONLINE AUDIO

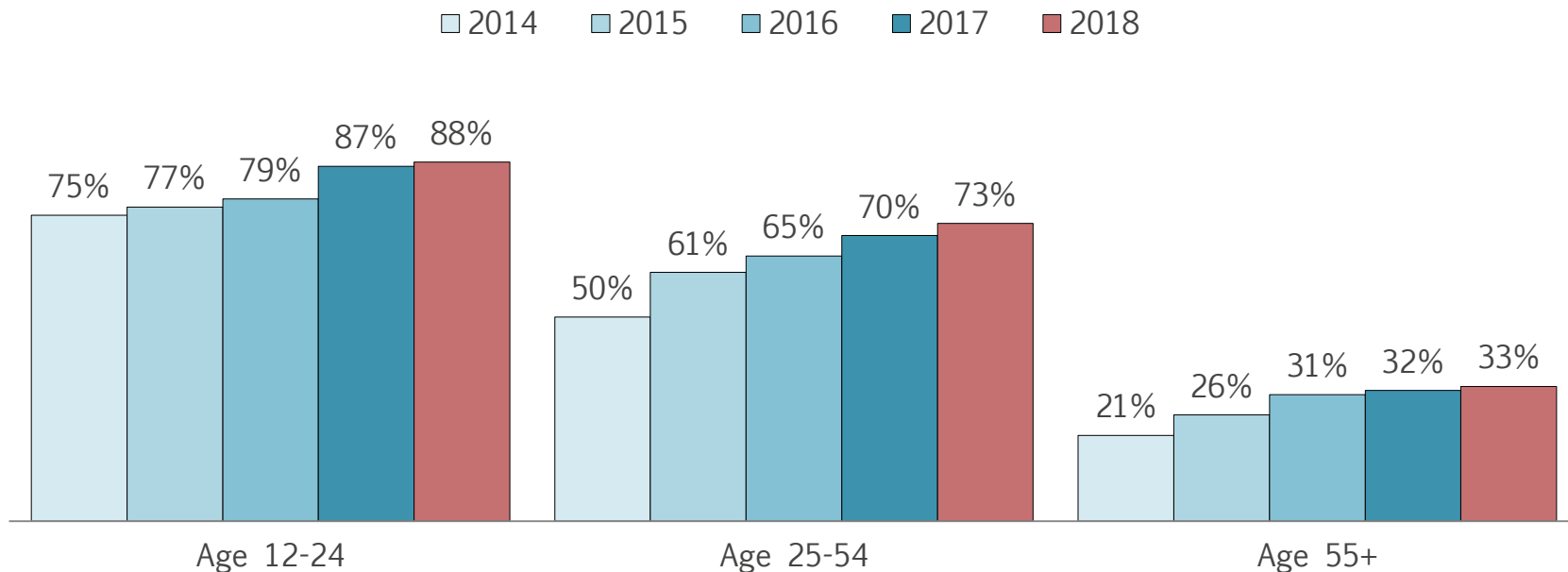
# Monthly Online Audio Listening

Total Population 12+

Estimated  
180 Million



# Monthly Online Audio Listening



% listening to Online Audio in last month

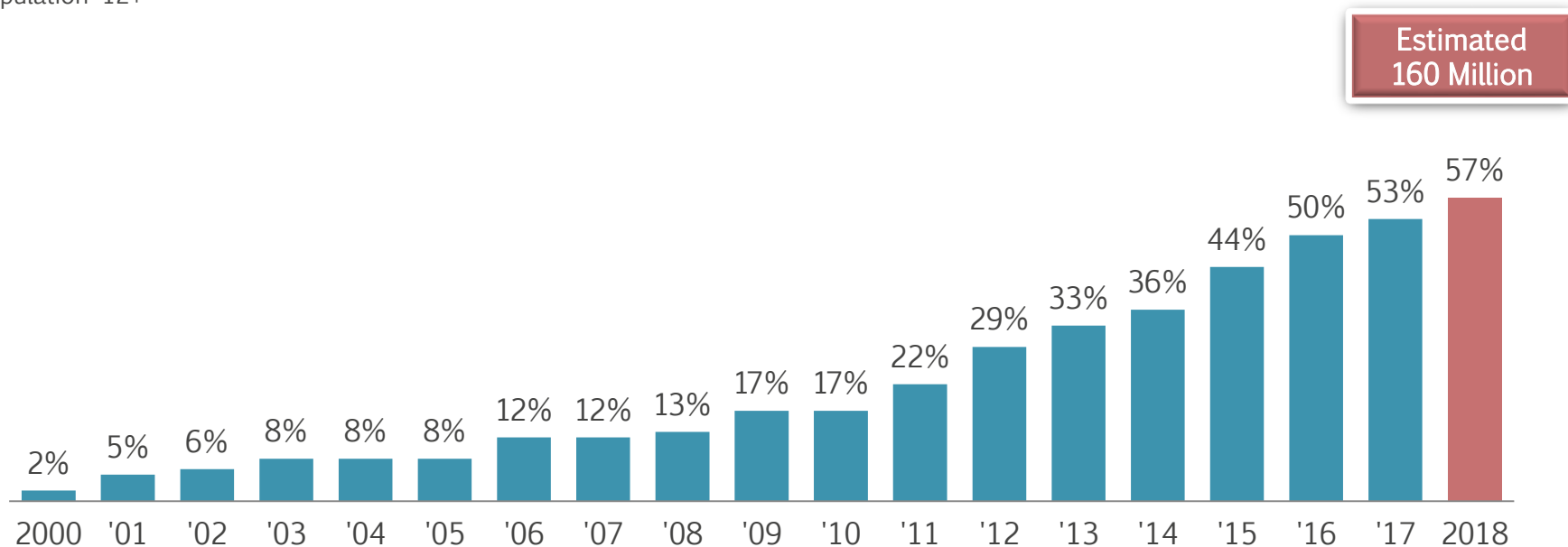
Online Audio = Listening to AM/FM radio stations online and/or listening to streamed audio content available only on the Internet

The Infinite Dial © 2018 Edison Research and Triton Digital



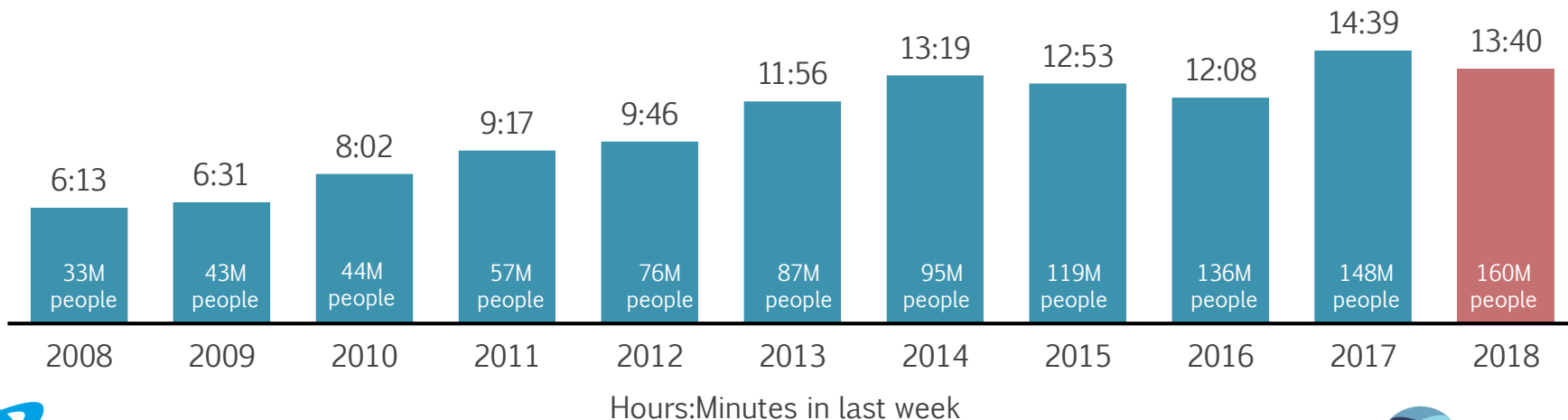
# Weekly Online Audio Listening

Total Population 12+



# Average Time “Weekly Online Audio Listeners” Spend Listening to Online Audio

Base: Weekly Online Audio Listeners





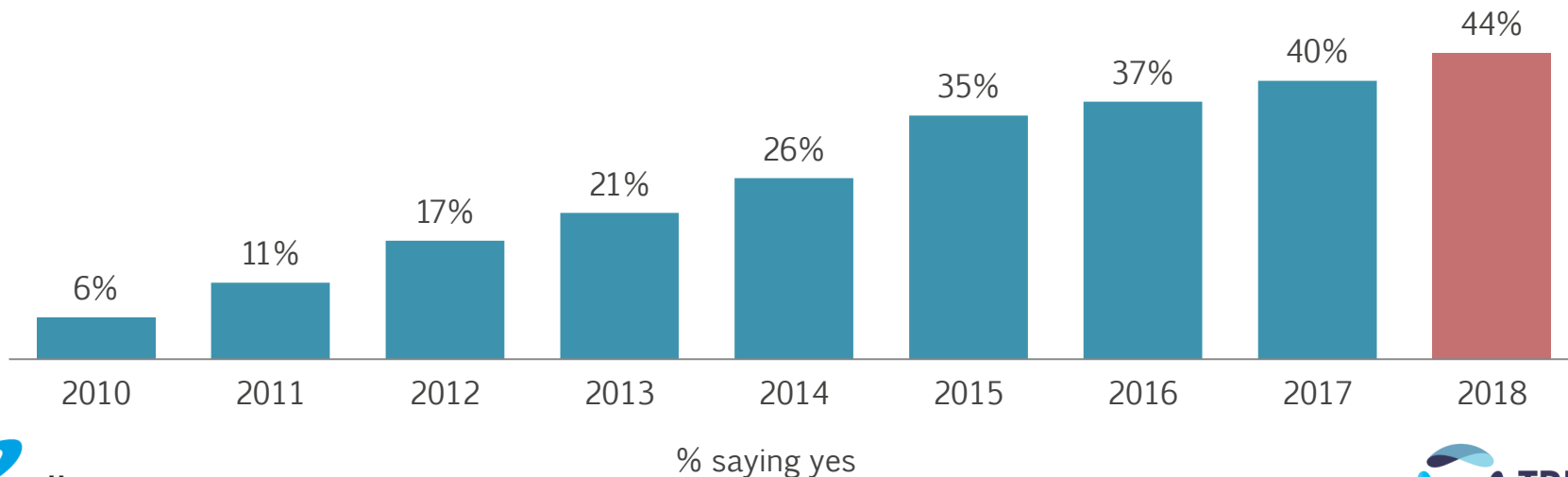
THE INFINITE DIAL  
2018

# Online Audio Listening in Car

*“Have you ever listened to Internet Audio in a car by listening to the stream from a cell phone that you have connected to a car audio system?”*

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Base: Own a cell phone; 95%

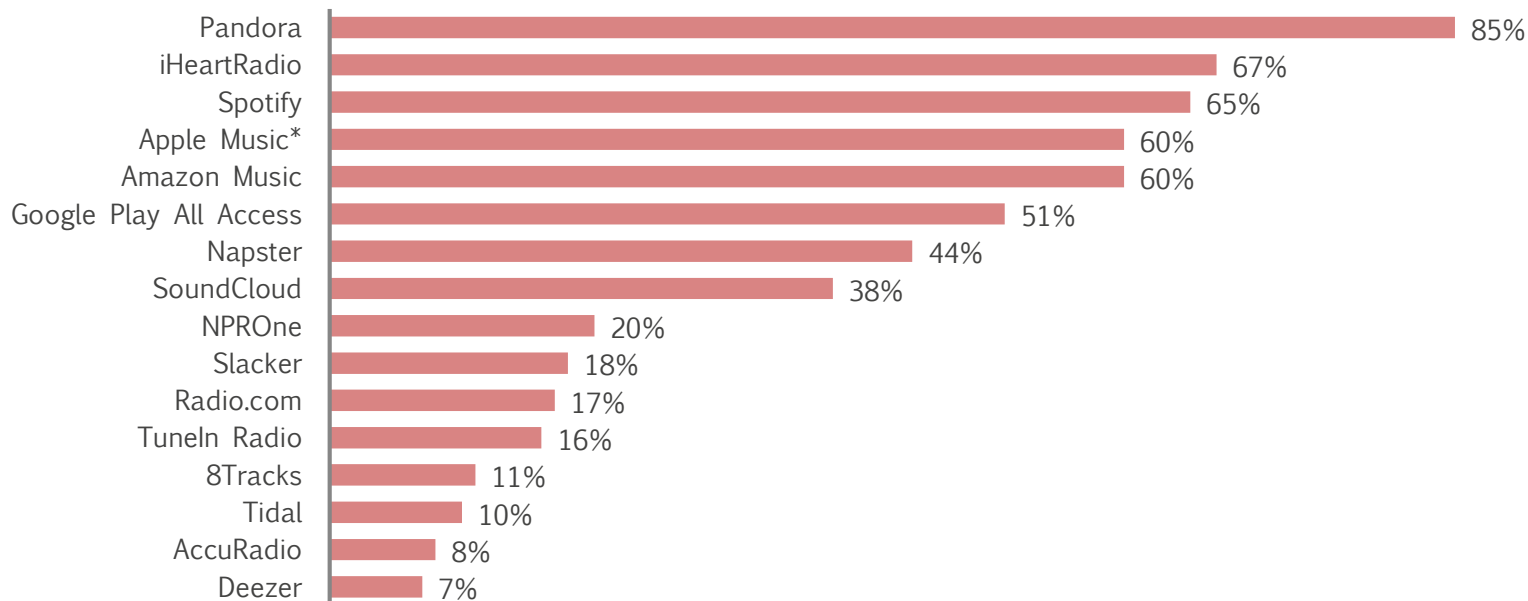




# AUDIO BRANDS

# Audio Brand Awareness

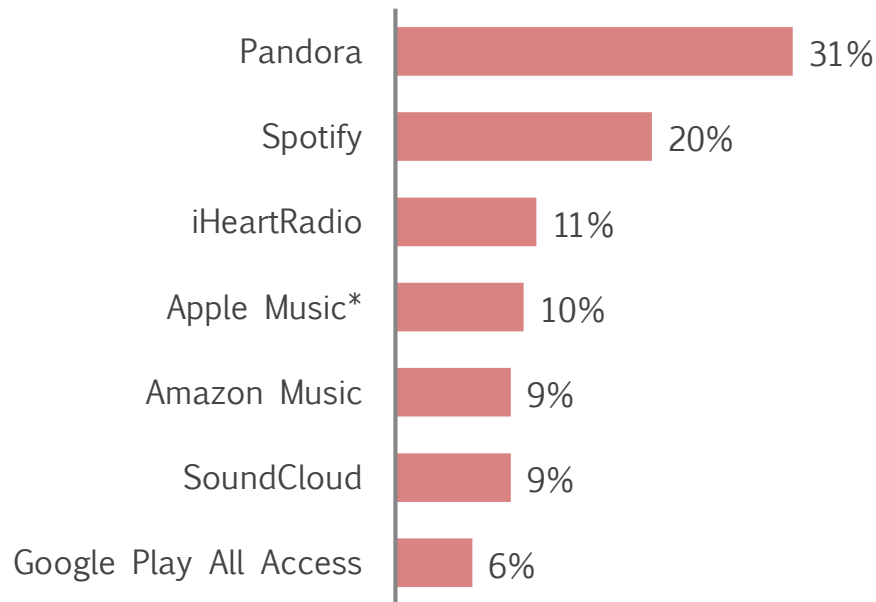
Total Population 12+



\*Asked as "Apple Music, the paid music subscription from Apple"

# Listened in the last month to...

Total Population 12+

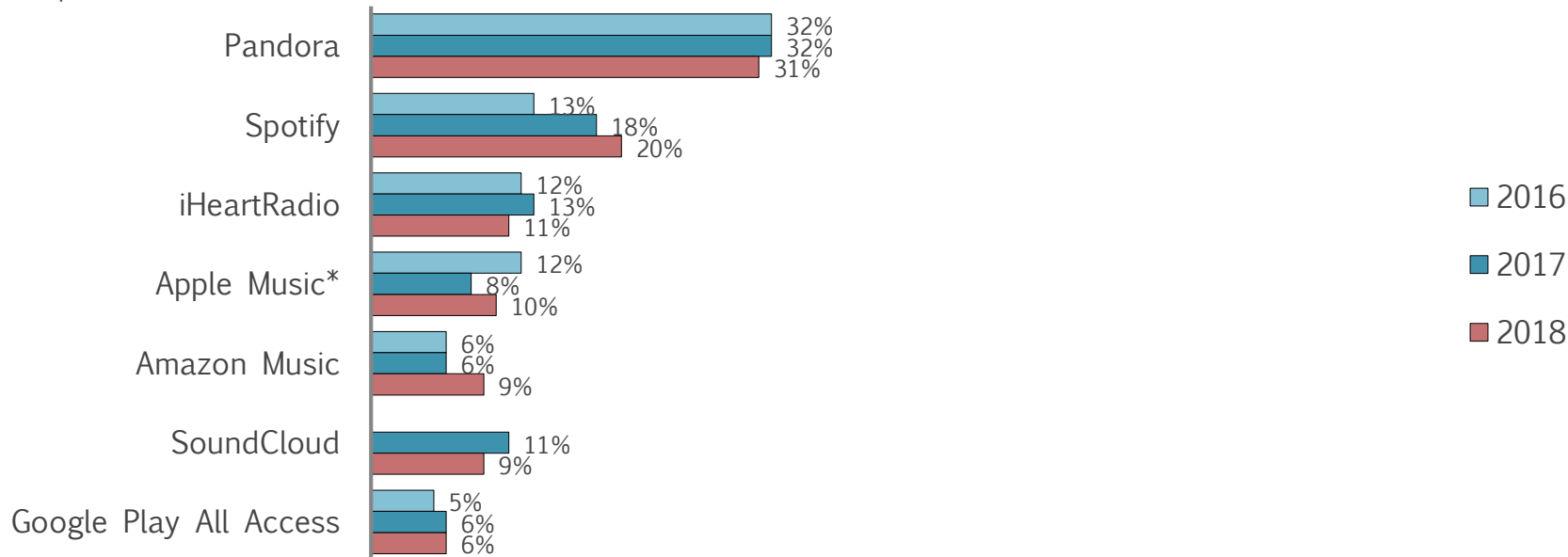


Brands lower than 6% Age 12+ not shown

*\*Asked as "Apple Music, the paid music subscription from Apple"*

# Listened in the last month to...

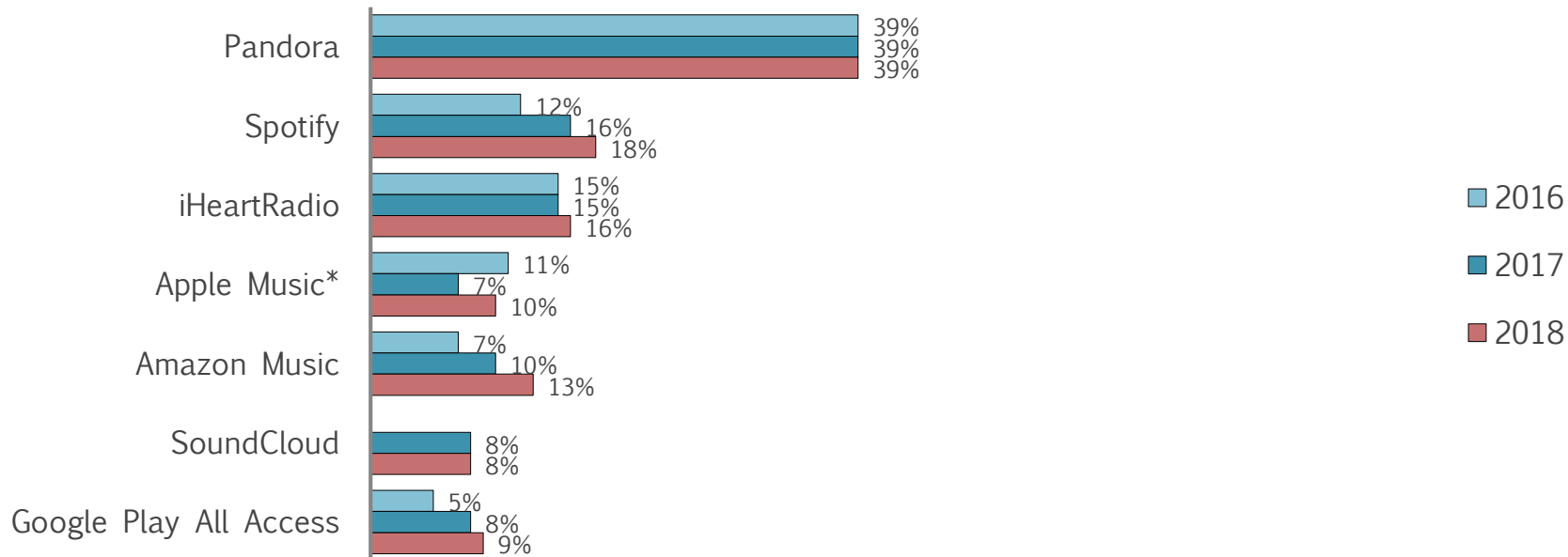
Total Population 12+



\*2016: \*Asked as Apple Music, formerly known as iTunes Radio  
2017-2018: \*Asked as Apple Music, the paid music subscription from Apple

% listened in last month

# Listened in the last month to... (Age 25-54)

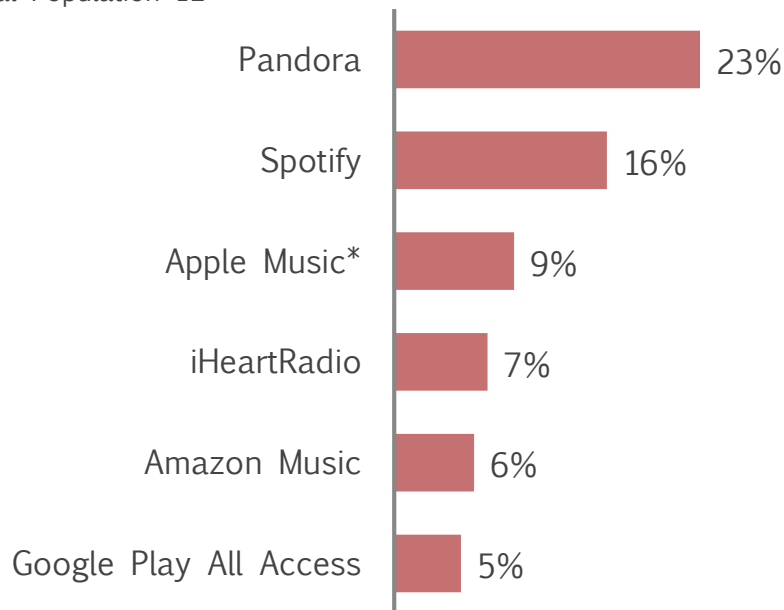


\*2016: \*Asked as Apple Music, formerly known as iTunes Radio  
2017-2018: \*Asked as Apple Music, the paid music subscription from Apple



# Listened in the last week to...

Total Population 12+

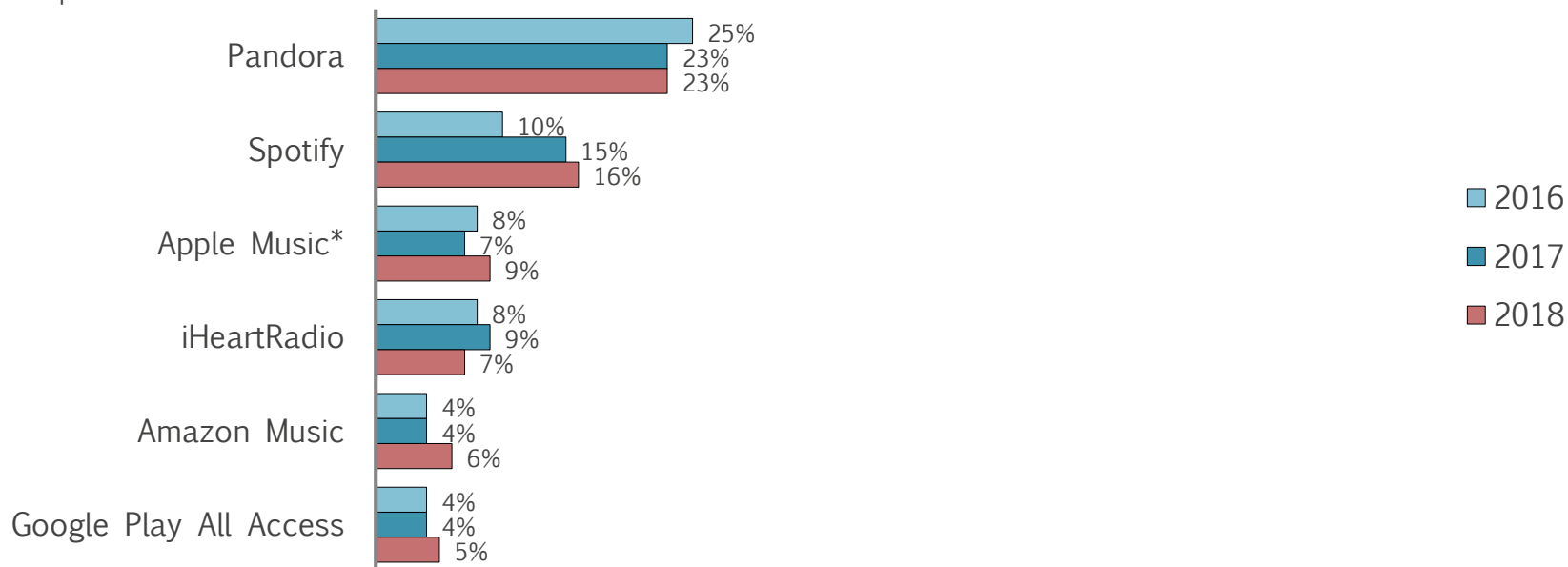


Brands lower than 5% Age 12+ not shown

*\*Asked as "Apple Music, the paid music subscription from Apple"*

# Listened in the last week to...

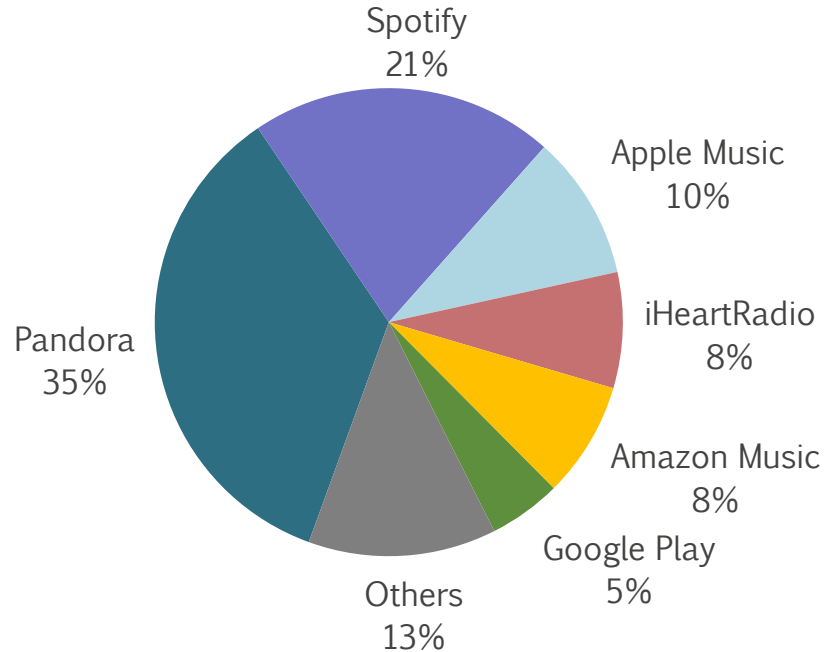
Total Population 12+



\*2016: \*Asked as Apple Music, formerly known as iTunes Radio  
2017-2018: \*Asked as Apple Music, the paid music subscription from Apple

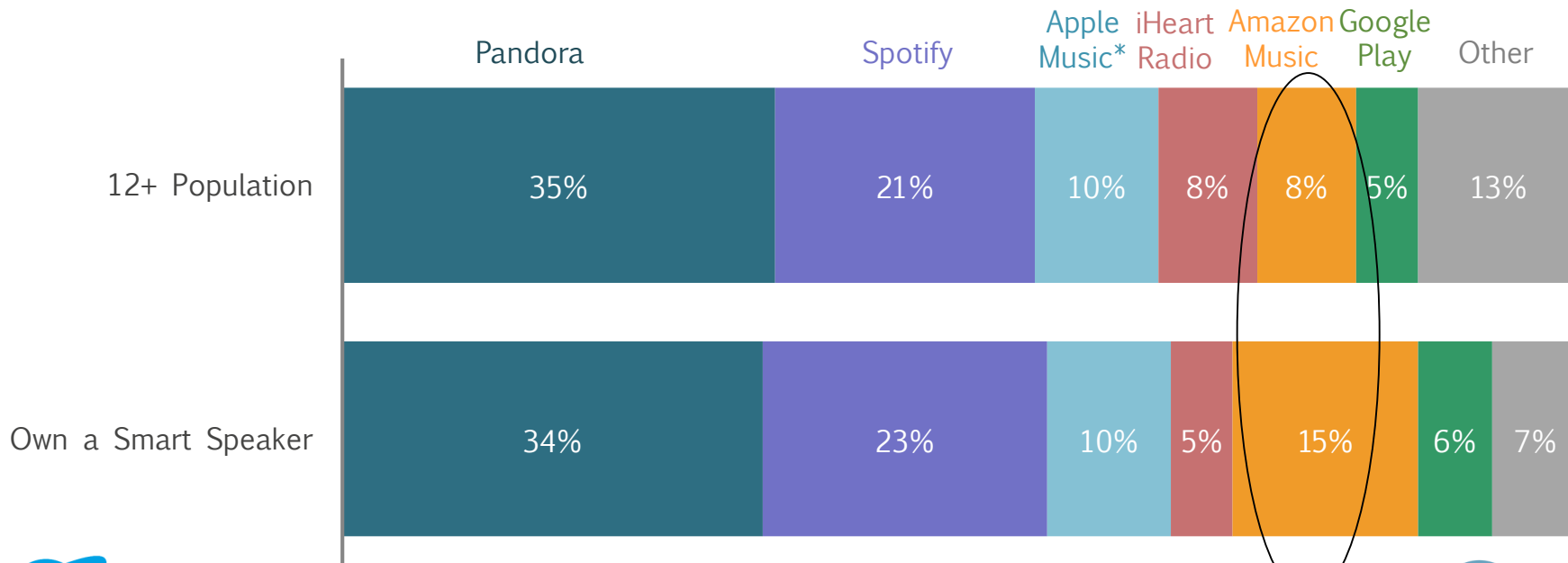
# Audio Brand Used Most Often

Base: Currently ever use any audio brand



# Audio Brand Used Most Often

Base: Currently ever use any audio brand



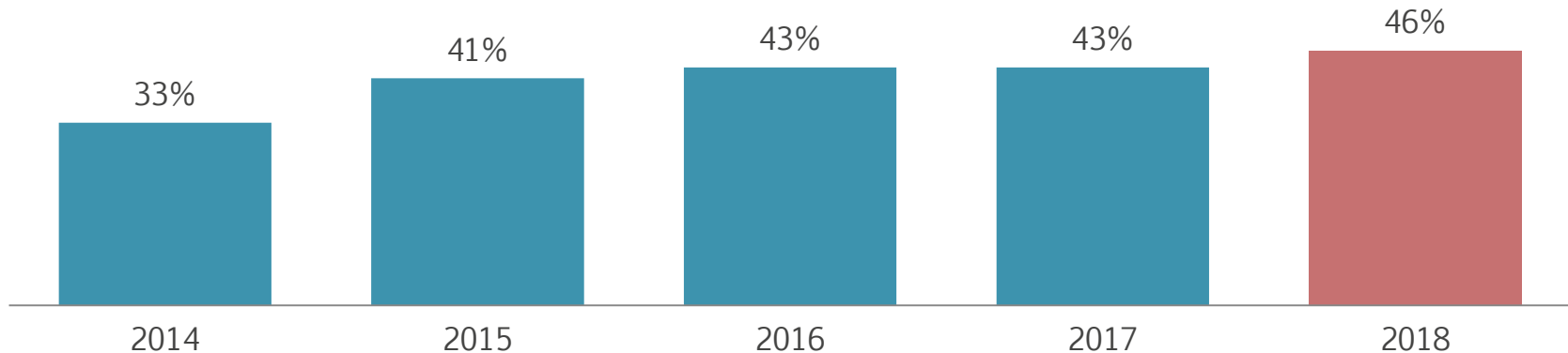
# Weekly YouTube Usage

*“Have you used YouTube to watch music videos or listen to music in the last week?”*

#InfiniteDial

Total Population 12+

Estimated  
129 Million

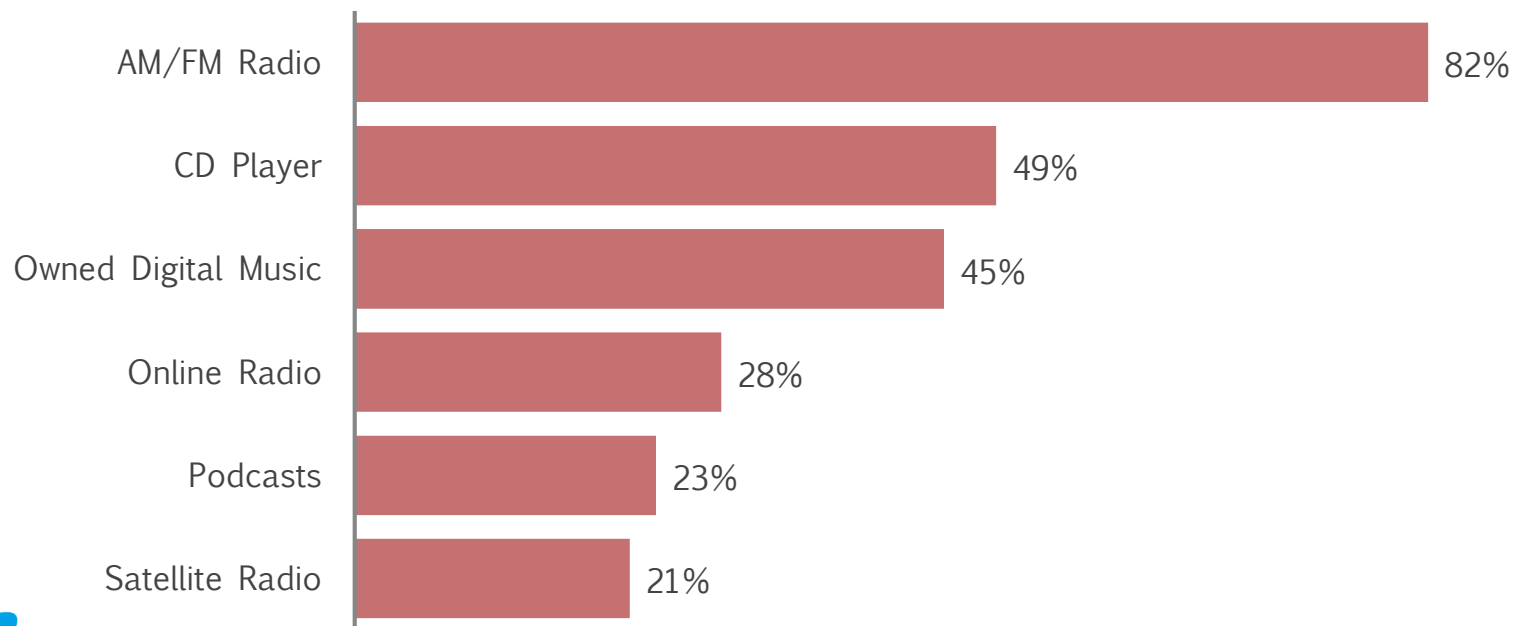




# IN-CAR MEDIA

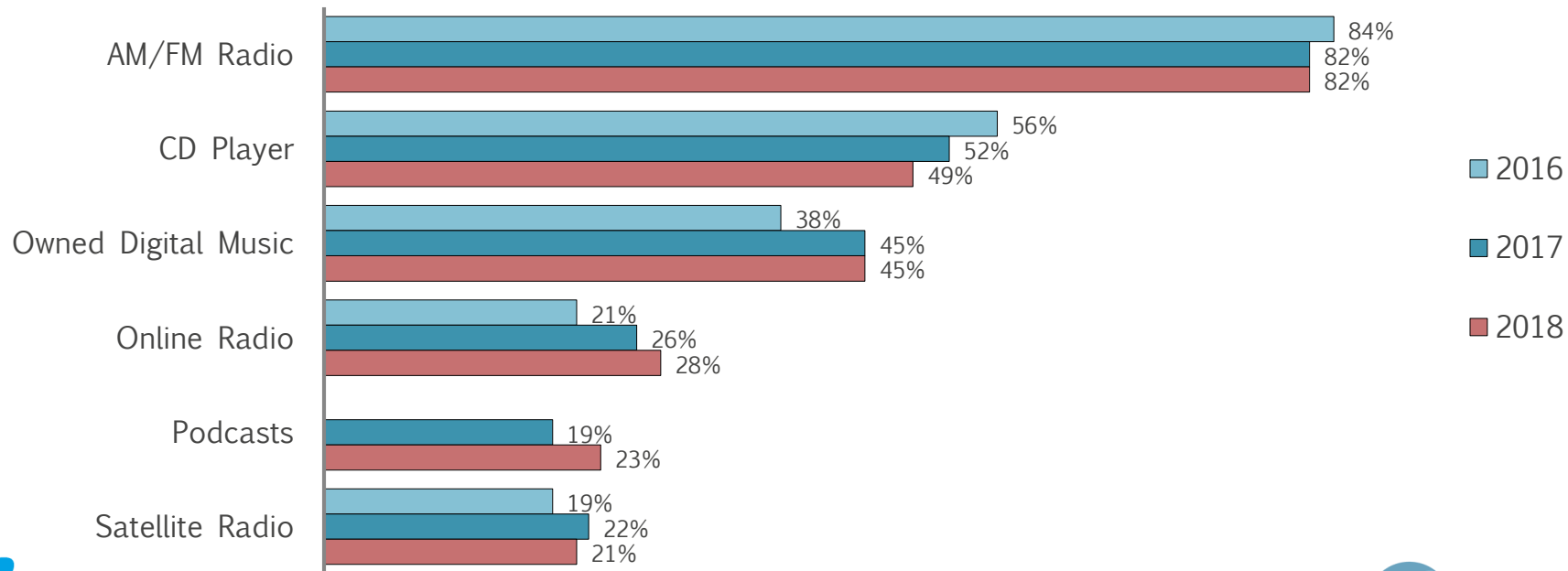
# Audio Sources Used in Car

Base: Age 18+ and has driven/ridden in car in last month; 88%



# Audio Sources Used in Car

Base: Age 18+ and has driven/ridden in car in last month; 88%

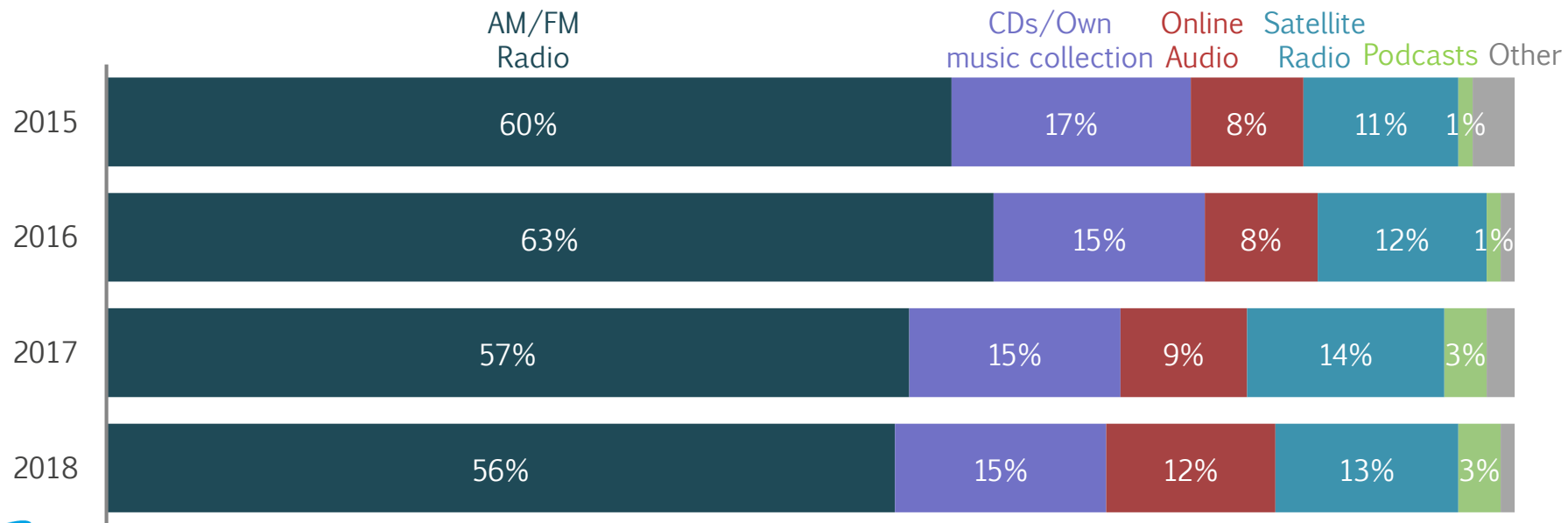


% currently ever using audio source in car



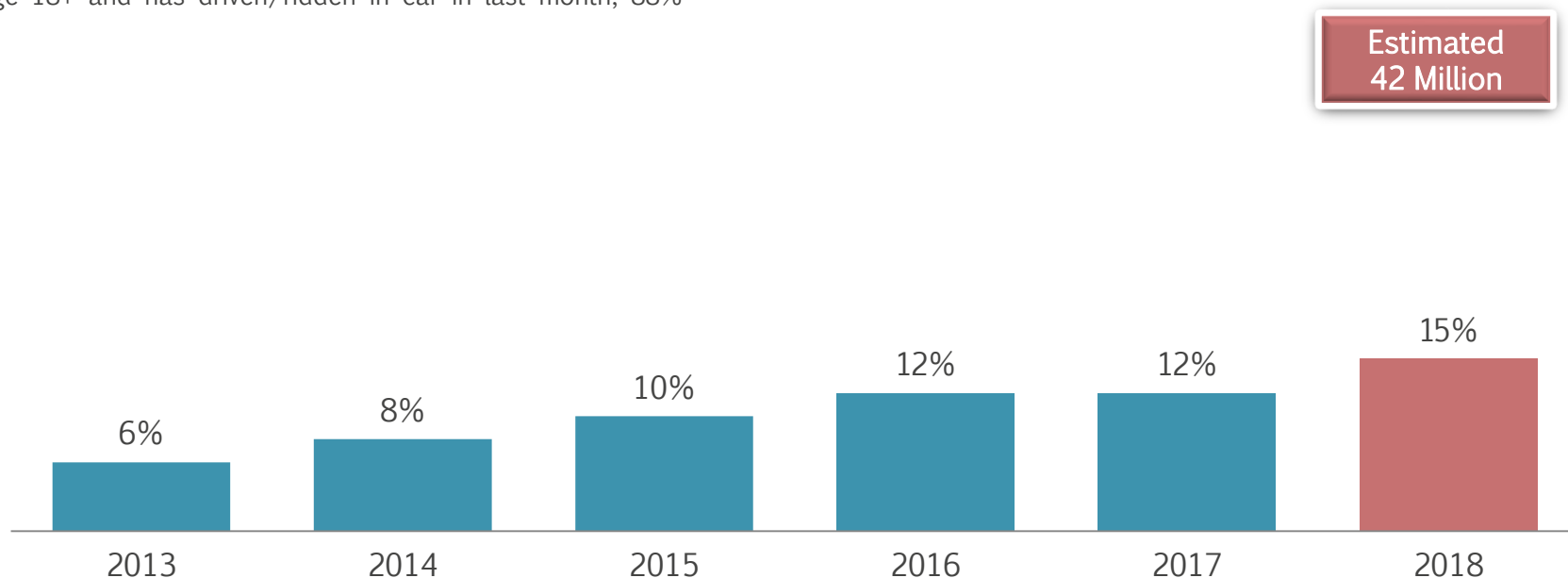
# Audio Source Used Most Often in Car

Base: Age 18+ and has driven/ridden in car in last month, and use any audio source in car



# In-Dash Information and Entertainment Systems

Base: Age 18+ and has driven/ridden in car in last month; 88%



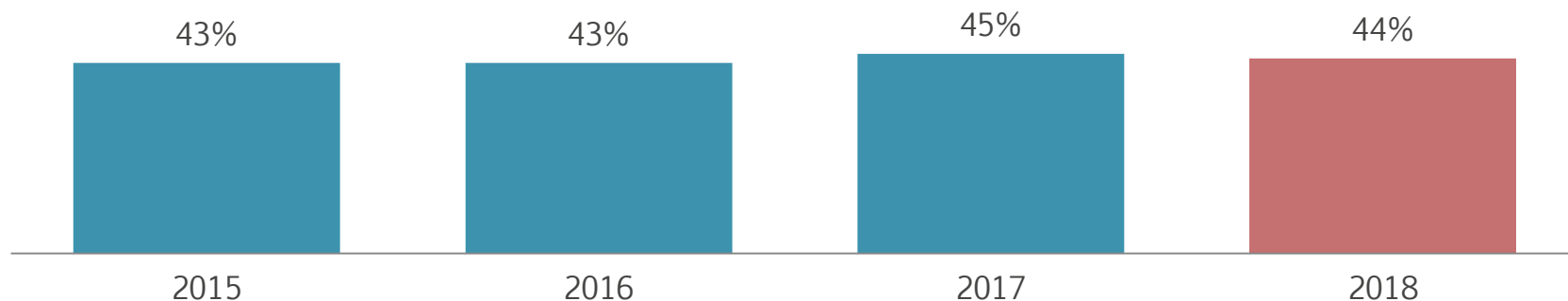


# AUDIOBOOKS

# Audiobook Listening

Total Population 12+

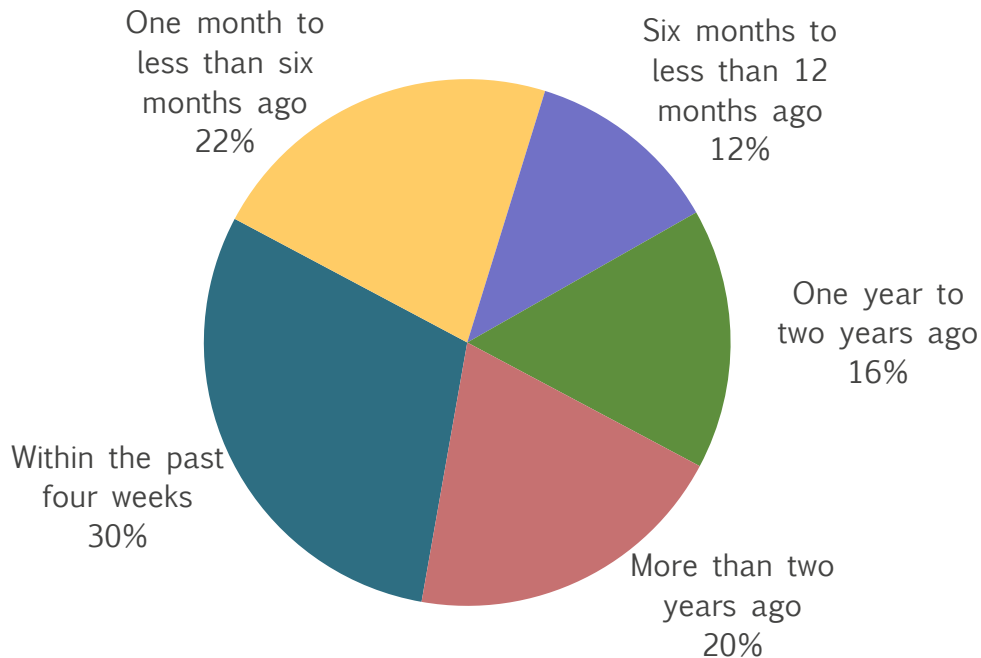
Estimated  
124 Million



% ever listened to an audiobook

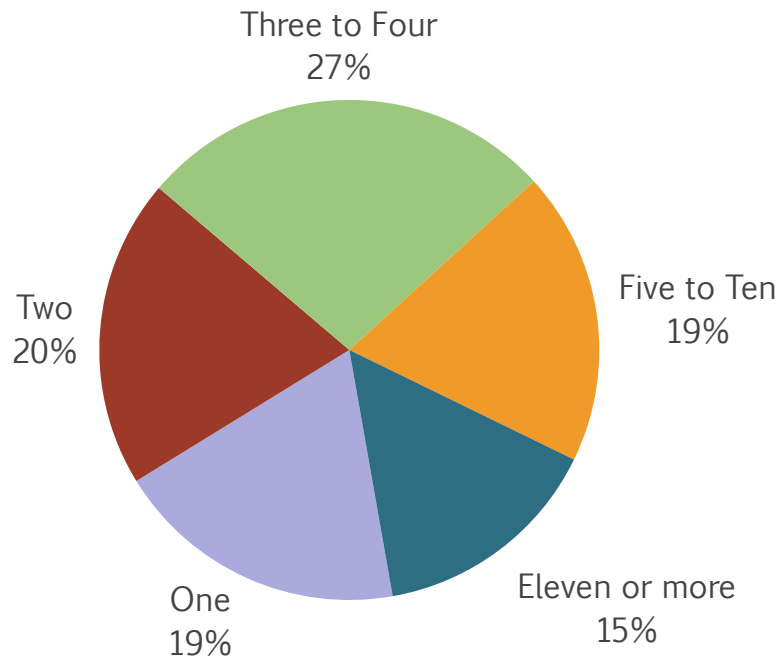
# Last Listened to an Audiobook

Base: Ever listened to an audiobook



# Number of Audiobooks Listened to in Past 12 Months

Base: Listened to audiobook in past 12 months



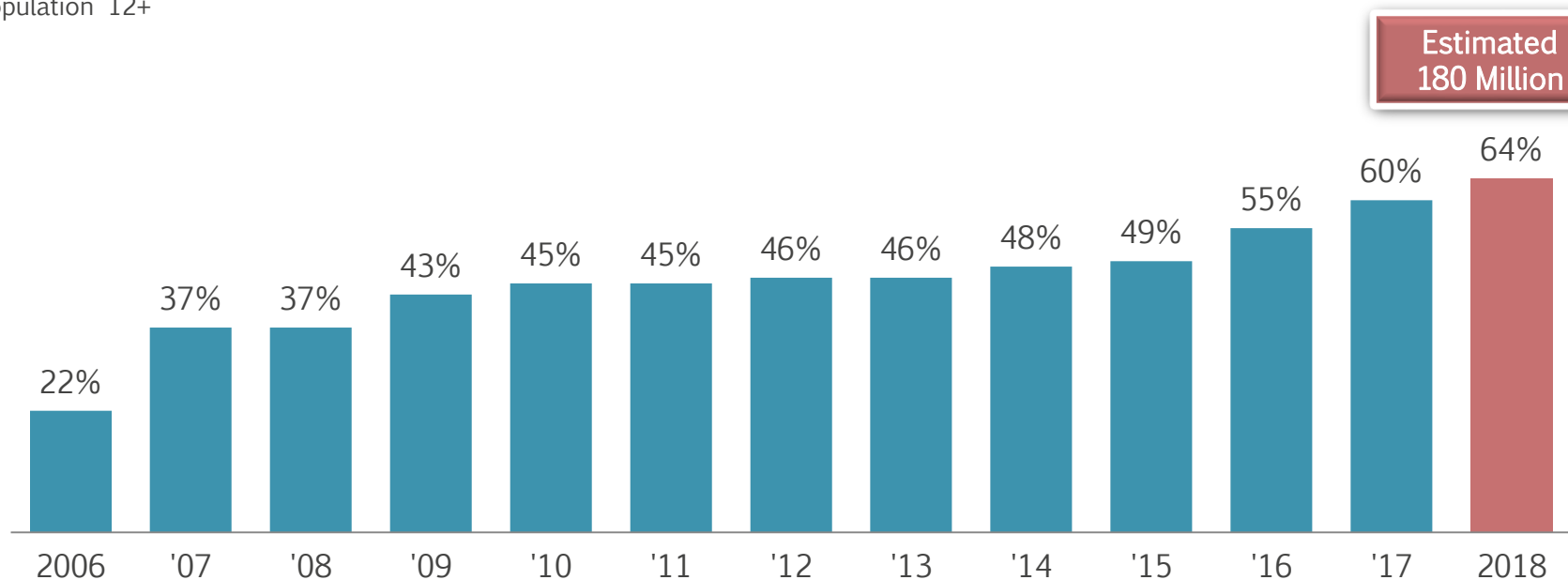
Median of  
three audiobooks  
listened to



# PODCASTING

# Podcasting Familiarity

Total Population 12+

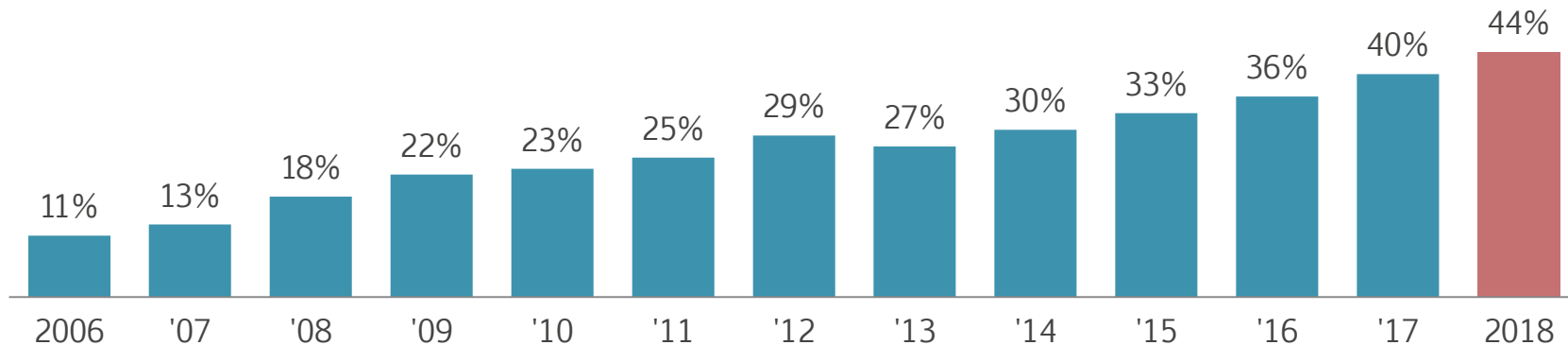




# Podcast Listening

Total Population 12+

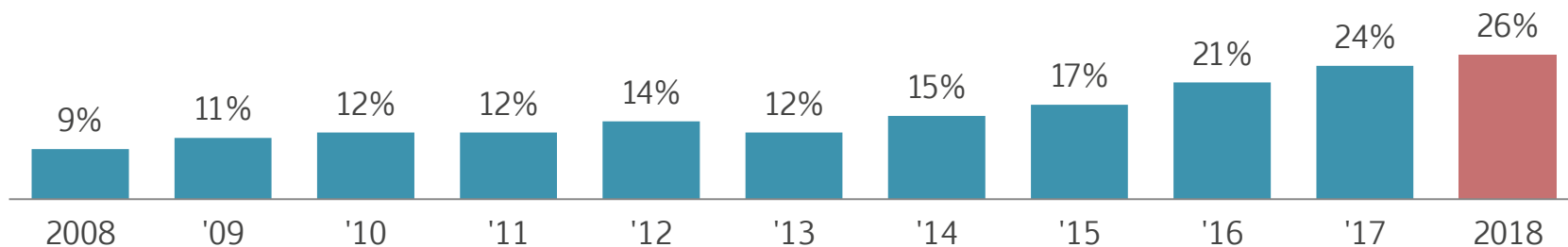
Estimated  
124 Million



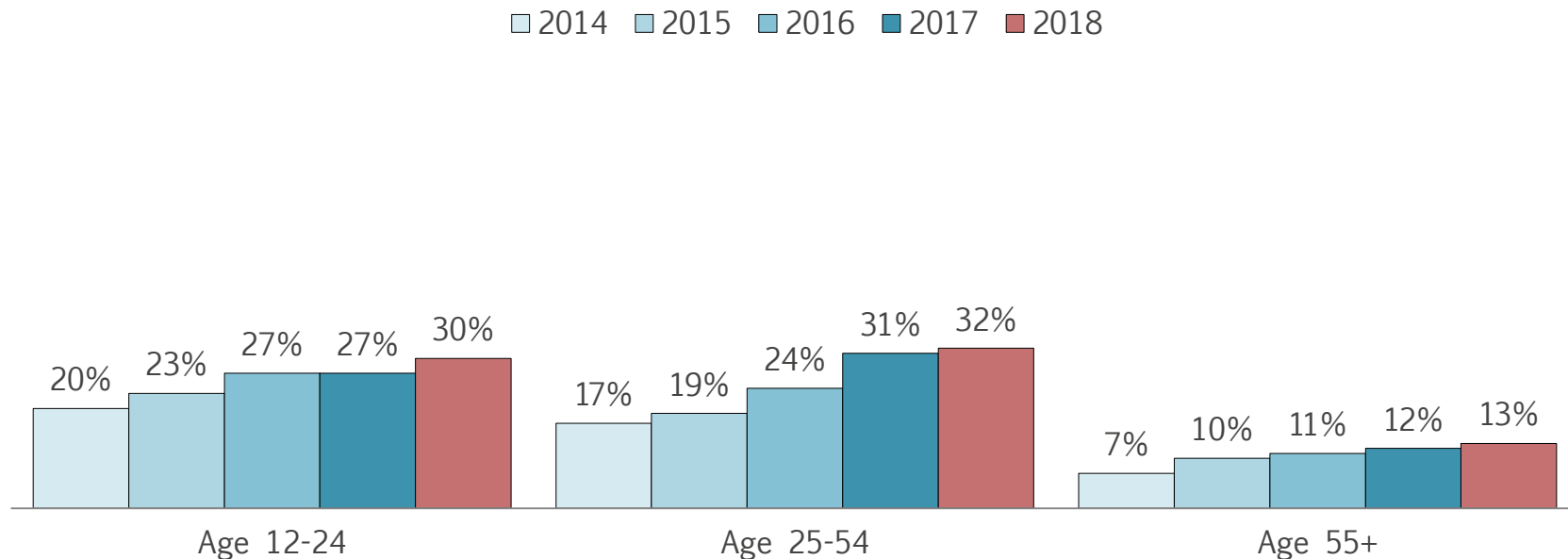
# Monthly Podcast Listening

Total Population 12+

Estimated  
73 Million

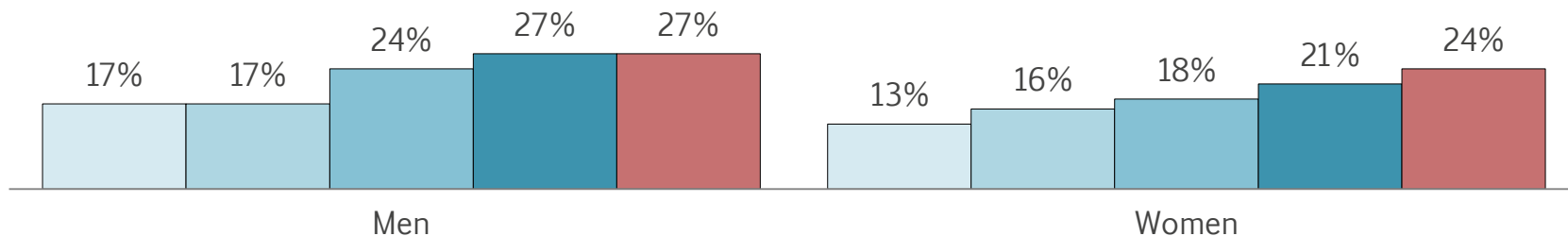


# Monthly Podcast Listening



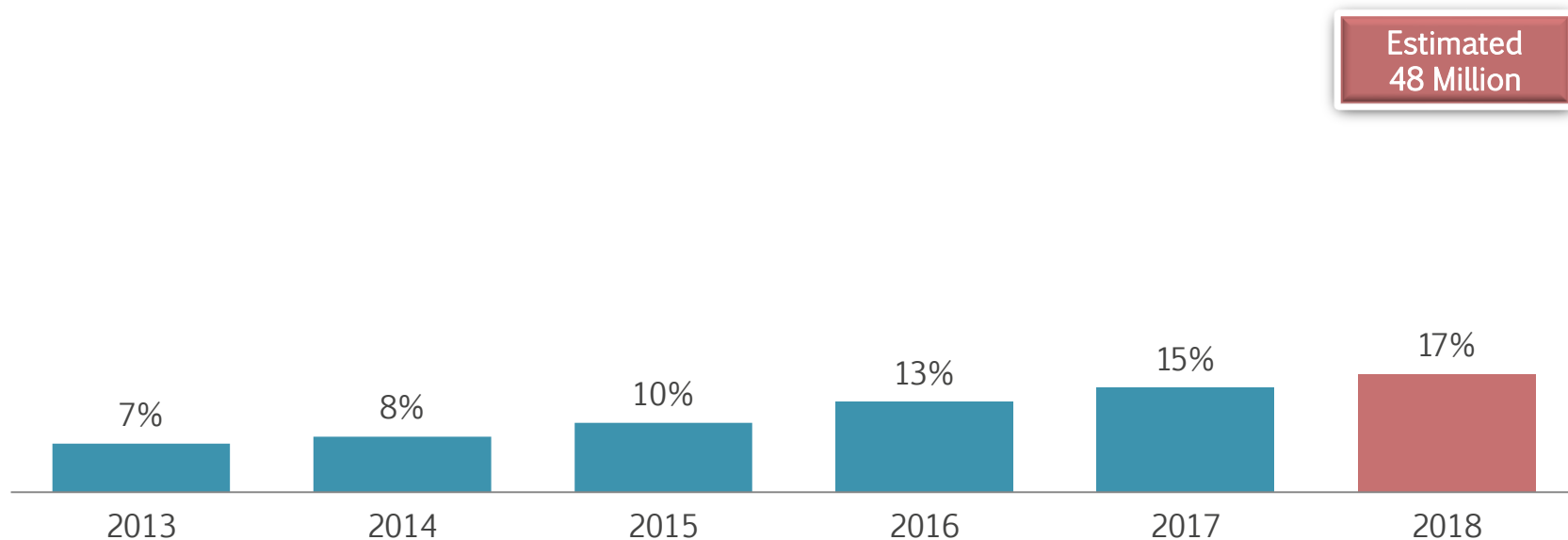
# Monthly Podcast Listening

□ 2014 □ 2015 □ 2016 □ 2017 □ 2018



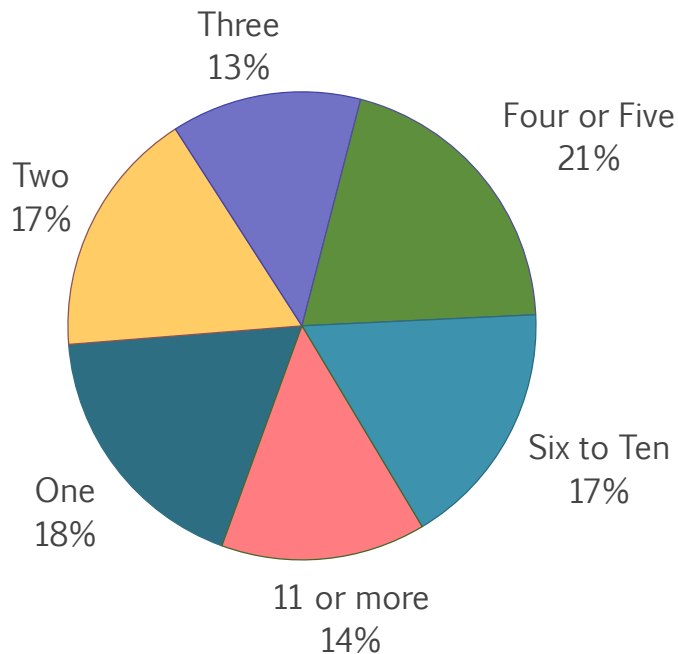
# Weekly Podcast Listening

Total Population 12+



# Number of Podcasts Listened to in Last Week

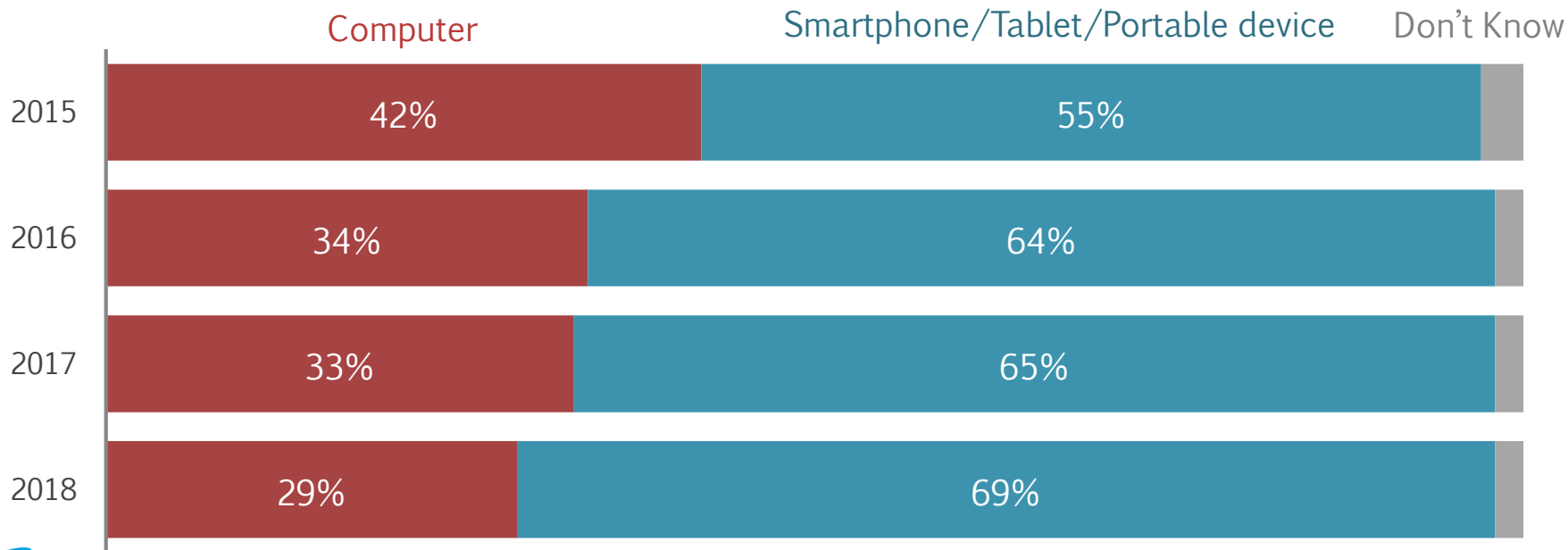
Base: Weekly Podcast Listeners



Average of seven  
podcasts listened  
per week

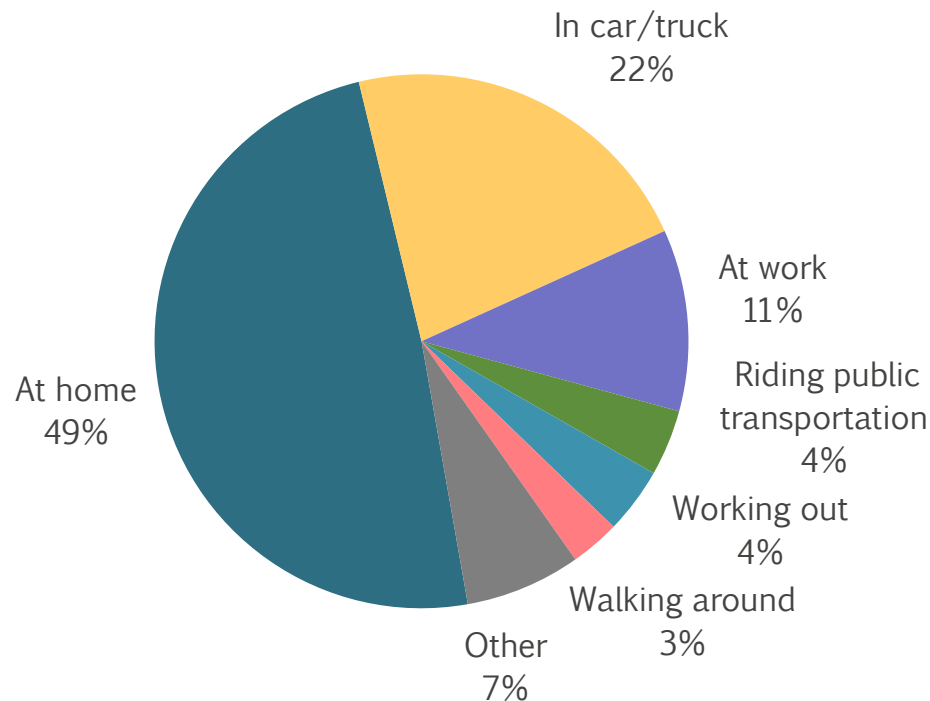
# Device Used Most Often to Listen to Podcasts

Base: Ever Listened to a Podcast



# Location Listened to Podcasts Most Often

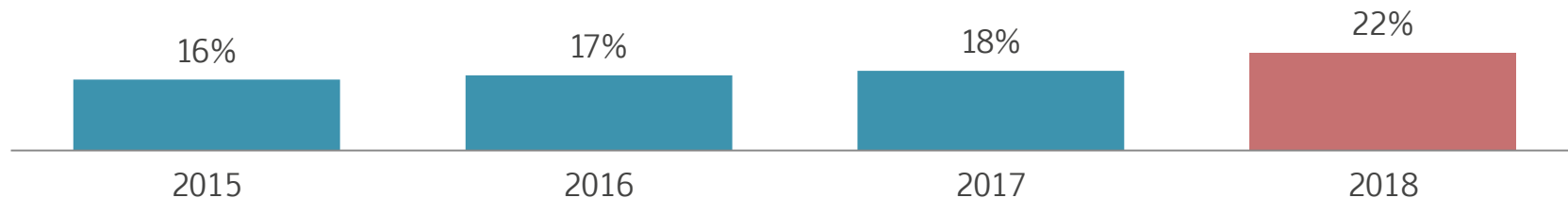
Base: Ever Listened to a Podcast





# Listen to Podcast Most Often in Car/Truck

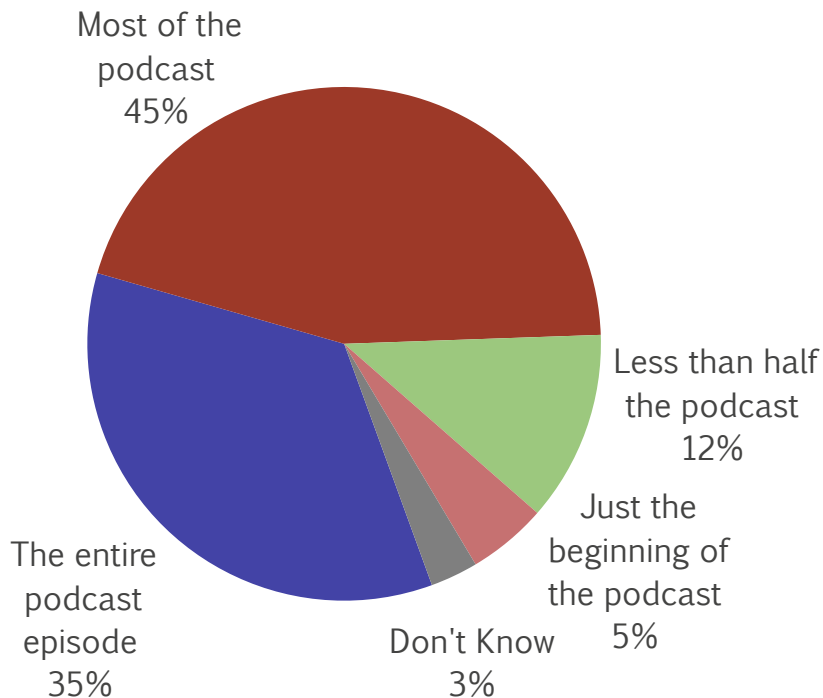
Base: Ever Listened to a Podcast



# Podcasting Listening

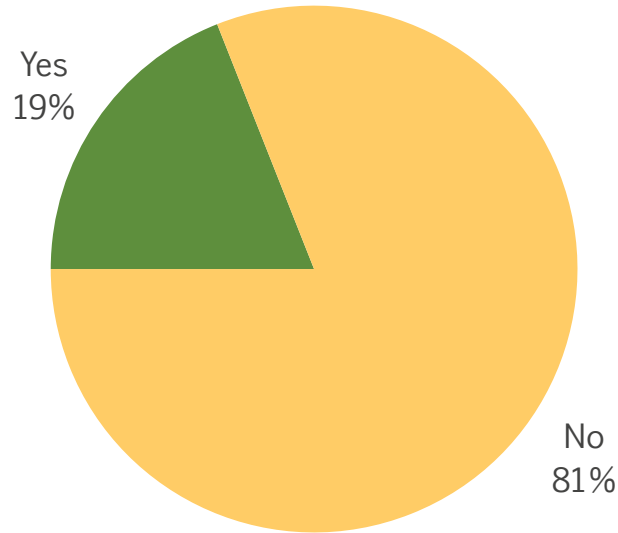
*“Think about the podcast episodes you listen to. Do you typically listen to..?”*

Base: Ever Listened to a Podcast



# Increasing Podcast Playback Speed

*“Do you ever increase the speed of your podcasts in order to listen to them faster?”*



Base: Ever Listened to a Podcast

Smart Speaker adoption is growing at a faster rate than the early days of smartphones. Brands and advertisers need to quickly develop an audio strategy that accounts for this dramatic change.

While AM/FM radio faces a “home hardware challenge,” particularly among 18-34 year-olds, radio remains by far the dominant medium in the car.

The percentage of Americans who use social media has tapered off, led by the first-ever decline in Facebook usage. Facebook also experienced a dramatic fall-off as the "most-used" service amongst younger people.

In streaming audio, Pandora maintains a stable percentage of users and remains the category leader. Growth in Spotify, Apple Music, and Amazon Music are all contributing to the continued growth in audio consumption.

Podcasting continues its steady growth, with even more significant gains in the vehicle. After remaining fairly steady for several years, the number of podcasts consumed by weekly listeners has also gone up-- matching the medium's increased Share of Ear.





# Save the Date

#InfiniteDial

Infinite Dial Canada  
April 4, 2018 at 2pm Eastern  
Details to follow

Infinite Dial Australia  
Spring 2018  
Details to follow





# THE INFINITE DIAL

2018

#InfiniteDial

