Study Overview

1. The Infinite Dial is the longest-running survey of digital media consumer behavior in America

2. The annual reports in this series have covered a wide range of digital media and topics since 1998

3. The Infinite Dial tracks mobile behaviors, internet audio, podcasting, social media, smart speakers and more
Podcast listening is UP
Presentation Outline

- Study Overview & Methodology
- Media & Technology
- Podcasting
- Online Audio
- Social Media
- Observations
In January 2024, Edison Research conducted a national survey of 1,086 people aged 12 and older.

Survey conducted in both English and Spanish using random digit dialing techniques (cell phone and landline) and an online probability panel to increase coverage of 12-17 year olds.

Data weighted to national 12+ U.S. population figures.
“Smart” device triumph is nearly total
93% own a Smartphone, Smart TV or Smart Speaker

Estimated 267 Million
Smartphone Ownership

Total U.S. Population 12+
% Owning a Smartphone

Estimated 258 Million

Year | Ownership
--- | ---
2009 | 10
2010 | 14
2011 | 31
2012 | 44
2013 | 53
2014 | 61
2015 | 71
2016 | 76
2017 | 81
2018 | 83
2019 | 84
2020 | 85
2021 | 88
2022 | 88
2023 | 91
2024 | 90
Smart TV Ownership

Total U.S. Population 12+
% Owning a Smart TV

2021: 61%
2022: 62%
2023: 70%
2024: 72%

Estimated 207 Million
Smart Speaker Ownership

Total U.S. Population 12+
% Owning a Smart Speaker

Estimated
98 Million
Audio Listening through Smart Speakers

Total U.S. Population 12+

- Listened to smart speaker in last month: 21%
- Listened to smart speaker in last week: 17%
<table>
<thead>
<tr>
<th>Year</th>
<th>One</th>
<th>Two</th>
<th>Three or more</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>70</td>
<td>18</td>
<td>12</td>
<td>1.6</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>
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<td>2021</td>
<td>47</td>
<td>19</td>
<td>34</td>
<td>2.3</td>
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<td>2022</td>
<td>41</td>
<td>26</td>
<td>33</td>
<td>2.4</td>
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<tr>
<td>2023</td>
<td>43</td>
<td>20</td>
<td>37</td>
<td>2.8</td>
</tr>
<tr>
<td>2024</td>
<td>36</td>
<td>21</td>
<td>43</td>
<td>2.9</td>
</tr>
</tbody>
</table>
Smart Speaker vs. Radio Ownership

Total U.S. Population 12+
% Owning Device

- Estimated
  - 98 Million Own smart speaker in household
  - 172 Million Own radio set in household
  - 75 Million Own Neither

34
60
26
Audio Sources Currently Ever Used in Car

Base: U.S. 18+ Who Has Driven/Ridden In Car Last Month; 85%
% CURRENTLY USE AUDIO SOURCE IN PRIMARY CAR

- AM/FM radio: 70%
- Online audio: 55%
- Podcasts: 32%
- CDs: 25%
- SiriusXM: 22%
- MP3/digital files: 16%
- Apple CarPlay: 16%
- Android Auto: 10%
Podcast listening is UP
Podcasting
Podcasting Familiarity

Total U.S. Population 12+
% AWARE OF PODCASTING

Estimated 241 Million
Monthly Podcast Listening

Total U.S. Population 12+
% LISTENED TO PODCAST IN THE LAST MONTH

---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---
9 | 11 | 12 | 12 | 14 | 12 | 15 | 17 | 21 | 24 | 26 | 32 | 37 | 41 | 38 | 42 | 47

Estimated
135 Million
Monthly Podcast Listening

Total U.S. Population 12+
% Listened to Podcast in the Last Month

<table>
<thead>
<tr>
<th>Year</th>
<th>Men</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>2021</td>
<td>43</td>
<td>39</td>
</tr>
<tr>
<td>2022</td>
<td>41</td>
<td>36</td>
</tr>
<tr>
<td>2023</td>
<td>46</td>
<td>39</td>
</tr>
<tr>
<td>2024</td>
<td>48</td>
<td>45</td>
</tr>
</tbody>
</table>
Monthly Podcast Listening

Total U.S. Population 12+
% LISTENED TO PODCAST IN THE LAST MONTH

- Age 12-34: 2021 = 56, 2022 = 50, 2023 = 55, 2024 = 59
- Age 55+: 2021 = 26, 2022 = 22, 2023 = 21, 2024 = 27
Weekly Podcast Listening

Total U.S. Population 12+
% LISTENED TO PODCAST IN THE LAST WEEK

2013: 7
2014: 8
2015: 10
2016: 13
2017: 15
2018: 17
2019: 22
2020: 24
2021: 28
2022: 26
2023: 31
2024: 34

Estimated 98 Million
U.S. Podcast Audience Nears Landmark

100 Million Weekly Listeners
Average number of podcast episodes listened to in a week:

Base: U.S. 12+ Weekly Podcast Listeners; 34%

<table>
<thead>
<tr>
<th></th>
<th>Total weekly podcast listeners</th>
<th>Male weekly podcast listeners</th>
<th>Female weekly podcast listeners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of episodes</td>
<td>8.3</td>
<td>7.2</td>
<td>9.5</td>
</tr>
</tbody>
</table>

**Note:** Base: U.S. 12+ Weekly Podcast Listeners; 34%
Podcasting Listening Overview
Total U.S. Population 12+

- Listened in last week (34%)
- Listened in last month but not last week (13%)
- Listened but not in the last month (20%)
- Aware but have never listened (17%)
- Not aware of podcasts (16%)

Non-listeners: 33%
Non-weekly listeners: 33%
Weekly listeners: 34%
Streaming Audio hits record highs
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 218 Million

Data from The Infinite Dial 2024
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

<table>
<thead>
<tr>
<th>Age</th>
<th>2022</th>
<th>2023</th>
<th>2024</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age 12-34</td>
<td>87</td>
<td>89</td>
<td>90</td>
</tr>
<tr>
<td>Age 35-54</td>
<td>81</td>
<td>85</td>
<td>85</td>
</tr>
<tr>
<td>Age 55+</td>
<td>52</td>
<td>53</td>
<td>52</td>
</tr>
</tbody>
</table>
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
201 Million
Online Audio Brand Awareness

Total U.S. Population 12+
% Aware of Online Audio Brand

- Pandora: 84%
- Spotify: 81%
- Apple Music: 76%
- iHeartRadio: 74%
- YouTube Music*: 74%
- Amazon Music: 71%
- SoundCloud: 42%
- NPR One: 23%
- Audacy: 16%
- TuneIn Radio: 14%

*Asked as “YouTube Music, the streaming music service from YouTube”
Online Audio Brands Listened to in Last Week

**Total U.S. Population 12+**
% LISTENED TO ONLINE AUDIO BRAND IN LAST WEEK

- **Spotify**: 29%
- **YouTube Music**: 22%
- **Apple Music**: 13%
- **Pandora**: 11%
- **Amazon Music**: 11%
- **iHeartRadio**: 6%
- **SoundCloud**: 4%

*Asked as “YouTube Music, the streaming music service from YouTube”*
Online Audio Brand Used Most Often

Base: U.S. 12+ Online Audio Users

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Spotify</th>
<th>YouTube Music</th>
<th>Apple Music</th>
<th>Pandora</th>
<th>Amazon Music</th>
<th>iHeart Radio</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total 12+</td>
<td>35</td>
<td>19</td>
<td>14</td>
<td>13</td>
<td>9</td>
<td>5</td>
<td>5</td>
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<tr>
<td>Age 12-34</td>
<td>55</td>
<td>14</td>
<td>17</td>
<td>7</td>
<td>4</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Age 35-54</td>
<td>24</td>
<td>23</td>
<td>16</td>
<td>15</td>
<td>13</td>
<td>5</td>
<td>4</td>
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<tr>
<td>Age 55+</td>
<td>18</td>
<td>22</td>
<td>8</td>
<td>19</td>
<td>13</td>
<td>12</td>
<td>8</td>
</tr>
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</table>
Audiobook Listening in Last Year

Total U.S. Population 12+
% LISTENED TO AN AUDIOBOOK IN THE LAST YEAR

<table>
<thead>
<tr>
<th>Year</th>
<th>% Listening</th>
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<tbody>
<tr>
<td>2015</td>
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<tr>
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<td>2022</td>
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<td>2023</td>
<td>35</td>
</tr>
<tr>
<td>2024</td>
<td>38</td>
</tr>
</tbody>
</table>

Estimated
109 Million
A year of change in social media
Social Media Usage

Total U.S. Population 12+
% Currently Ever Use Social Media

Estimated
235 Million

<table>
<thead>
<tr>
<th>Year</th>
<th>Usage</th>
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<tr>
<td>'23</td>
<td>82</td>
</tr>
<tr>
<td>2024</td>
<td>82</td>
</tr>
</tbody>
</table>
Social Media Brand Awareness

Total U.S. Population 12+
% Aware of Social Media Brand

- Facebook: 94%
- Instagram: 92%
- TikTok: 91%
- Snapchat: 85%
- X/Twitter*: 82%
- Pinterest: 77%
- LinkedIn: 72%
- Discord: 43%
- Threads: 29%
- Truth Social: 25%
- Mastodon: 7%

*Asked as: "X, formerly known as Twitter"
Social Media Usage

Total U.S. Population 12+
% Currently Use Source

2020s: Facebook has consistent lead, even after others mature

Musk buys Twitter

RIP MYSPACE
RIP VINE

2007 '08 '09 '10 '11 '12 '13 '14 '15 '16 '17 '18 '19 '20 '21 '22 '23 2024
Social Media Brand Usage

Total U.S. Population 12+
% Currently Use Social Media Brand

- Facebook: 63%
- Instagram: 44%
- TikTok: 35%
- Pinterest: 28%
- LinkedIn: 27%
- Snapchat: 25%
- X/Twitter*: 19%
- Discord: 18%
- Threads: 3%
- Truth Social: 2%
- Mastodon: 1%

*Asked as: "X, formerly known as Twitter"
X/Twitter Usage

Total U.S. Population 12+
% CURRENTLY USE TWITTER/X

2010  7
2011  8
2012  10
2013  15
2014  16
2015  18
2016  21
2017  23
2018  21
2019  19
2020  21
2021  23
2022  27
2023  27
2024  19

*in 2024 asked as: "X, formerly known as Twitter"
X/Twitter Usage

Total U.S. Population 12+
% Currently Use Twitter/X

2023: 27
2024: 19

Estimated users in 2023: 77 Million
Estimated users in 2024: 55 Million

Estimated decline: 22 Million Users

*in 2024 asked as: "X, formerly known as Twitter"
Social Media Brand Usage

Total U.S. Population 12+
% CURRENTLY USE SOCIAL MEDIA BRAND

Facebook 2022: 63% 2023: 63% 2024: 61%
Instagram 2022: 46% 2023: 44% 2024: 44%
TikTok 2022: 33% 2023: 36% 2024: 35%
Pinterest 2022: 28% 2023: 31% 2024: 28%
LinkedIn 2022: 21% 2023: 26% 2024: 27%
Snapchat 2022: 27% 2023: 27% 2024: 27%
X/Twitter* 2022: 19% 2023: 27% 2024: 27%
Discord NOT ASKED

*Asked as: “X, formerly known as Twitter”
Social Media Brand Used Most Often

Base: U.S. 12+ Social Media Users

<table>
<thead>
<tr>
<th>Year</th>
<th>Facebook</th>
<th>Instagram</th>
<th>TikTok</th>
<th>Snapchat</th>
<th>Twitter</th>
<th>Pinterest</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022</td>
<td>54</td>
<td>14</td>
<td>10</td>
<td>7</td>
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<td>4</td>
<td>6</td>
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<tr>
<td>2023</td>
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<td>6</td>
<td>7</td>
<td>3</td>
<td>6</td>
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<td>13</td>
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Social Media Brand Used Most Often

Base: U.S. 12+ Social Media Users

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<td>19</td>
<td>31</td>
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<td>5</td>
</tr>
<tr>
<td>Age 35-54</td>
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<tr>
<td>Age 55+</td>
<td>71</td>
<td>6</td>
<td>4</td>
<td>1</td>
<td>3</td>
</tr>
</tbody>
</table>
Observations

1. Don't confuse download counts for listening -- podcast listening grew strongly in the last year.

2. Podcast listening grew fastest among women, nearly eliminating the gap in listening vs. men -- this platform is so much more than chat shows for guys.

3. Just under 100 million Americans age 12 and older now listen to podcasts every week - a milestone that the podcasting industry should promote aggressively.
Observations

4. More than 2/3rds of all Americans age 12 and older use streaming audio each week -- online streams of radio and pureplays is now a fully mainstream channel.

5. Audiobooks also see a new high.

6. X/Twitter usage tails off dramatically; Facebook remains the overwhelming leader but among younger Americans it's Instagram and TikTok.