

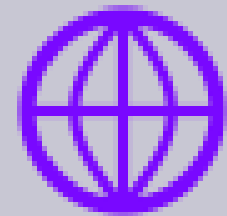


THE INFINITE DIAL[®] UK 2025



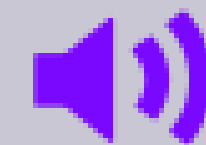
About AdsWizz

A team of award-winning audiophiles, devoted to the world of sound.



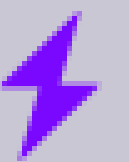
Global

We invented the world's first targeted radio ad, podcast ad, third party podcast brand safety, and pixel-based audio attribution. We continue to innovate in ways that help our customers build scaled digital audio businesses.



Audio-Centric

Audio remains at the heart of what we do, with other channels amplifying those connections wherever audiences engage. We're an open ecosystem, free from omnichannel imprecision and walled gardens.

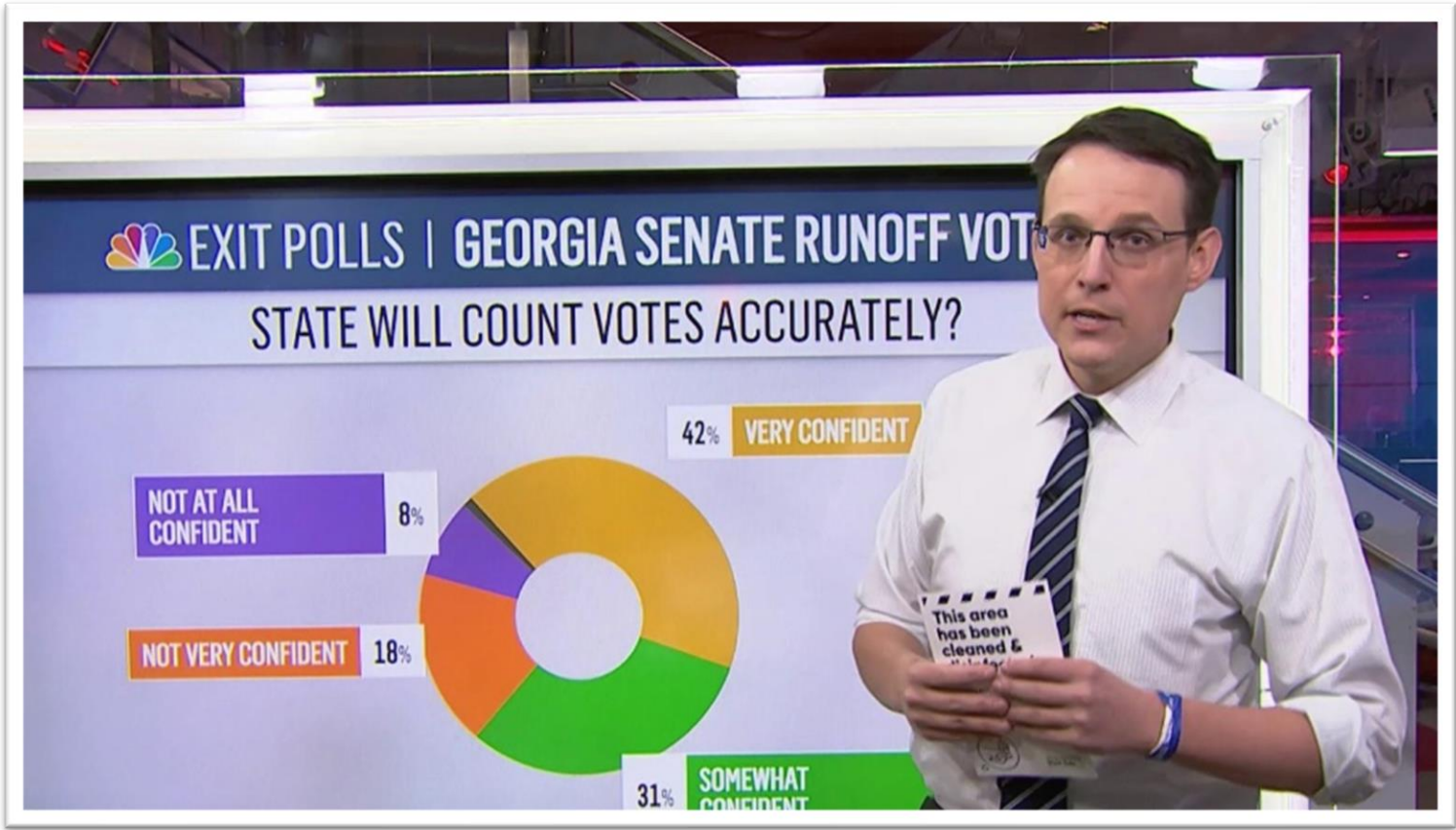


Pioneers

Our technology powers a vast majority of the world's digital audio ads globally.

About Edison Research

Edison Research is a leading provider of Audio Research, Election Research, and Market Research that informs brands and companies around the world.



Study Overview

- The Infinite Dial is the longest-running survey of digital media consumer behavior in America
- The Infinite Dial UK report mirrors the Infinite Dial U.S. reports, which have been undertaken annually since 1998 by Edison Research, and cover a wide range of online digital media topics
- This is the second Infinite Dial UK report since 2021 that explores the penetration of online digital audio and social media in the UK, as well as the online platforms and technologies used
- This study is designed to allow for direct comparisons between the UK, U.S., Australia, and New Zealand markets



Study Methodology

- In March 2025, Edison Research conducted a national survey of 1,313 people aged 16 and older
 - N=318 telephone surveys
 - N=995 online surveys
- Data weighted to national 16+ population figures
- Findings tracked to the 2021 Infinite Dial UK report



Presentation Outline



Study Overview & Methodology



Media & Technology



Social Media



Online Audio



Online Audio Brands



Podcasts



In-Car Media



Observations

 THE INFINITE DIAL® UK 2025

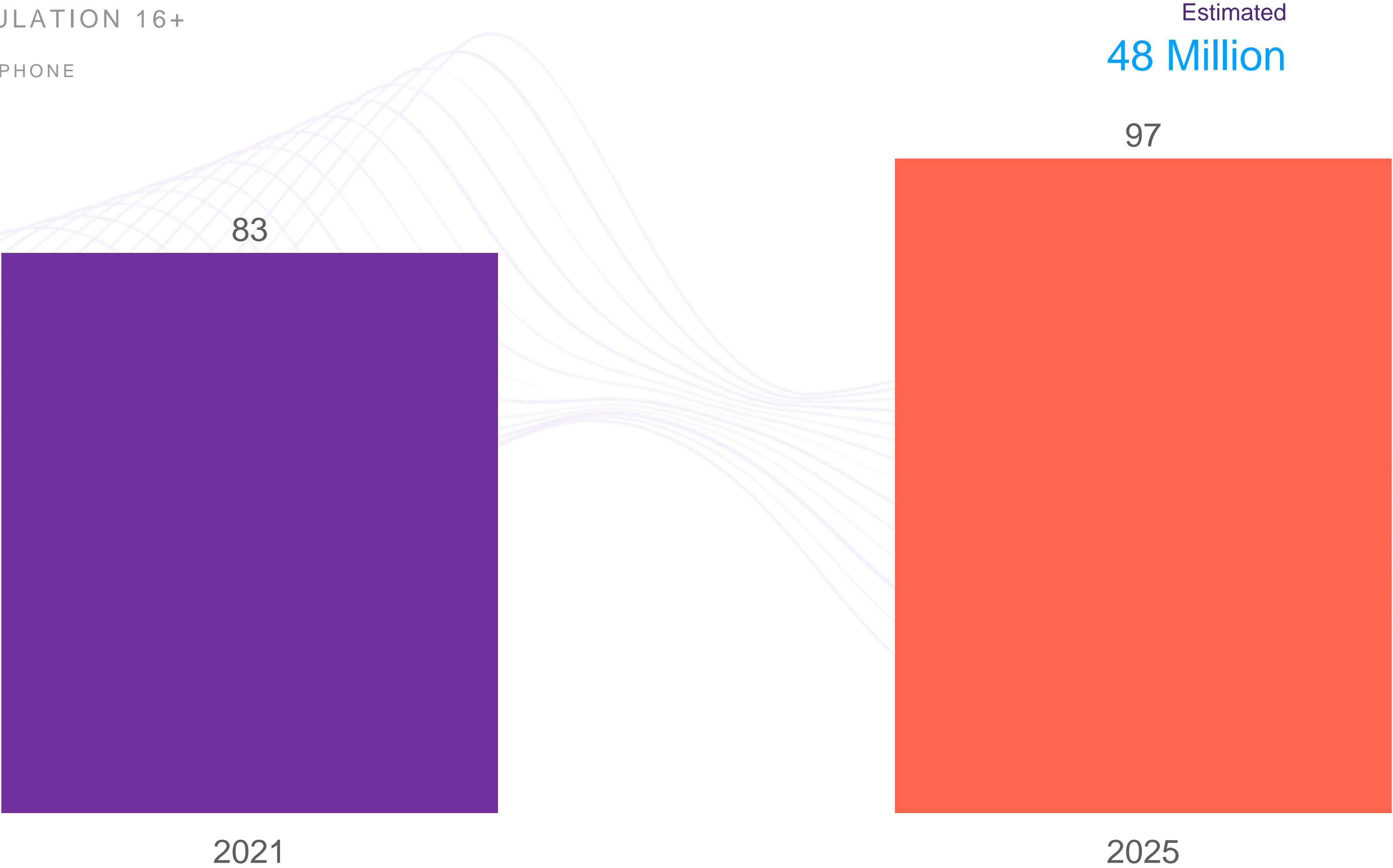
Media & Technology



Smartphone Ownership

TOTAL UK POPULATION 16+

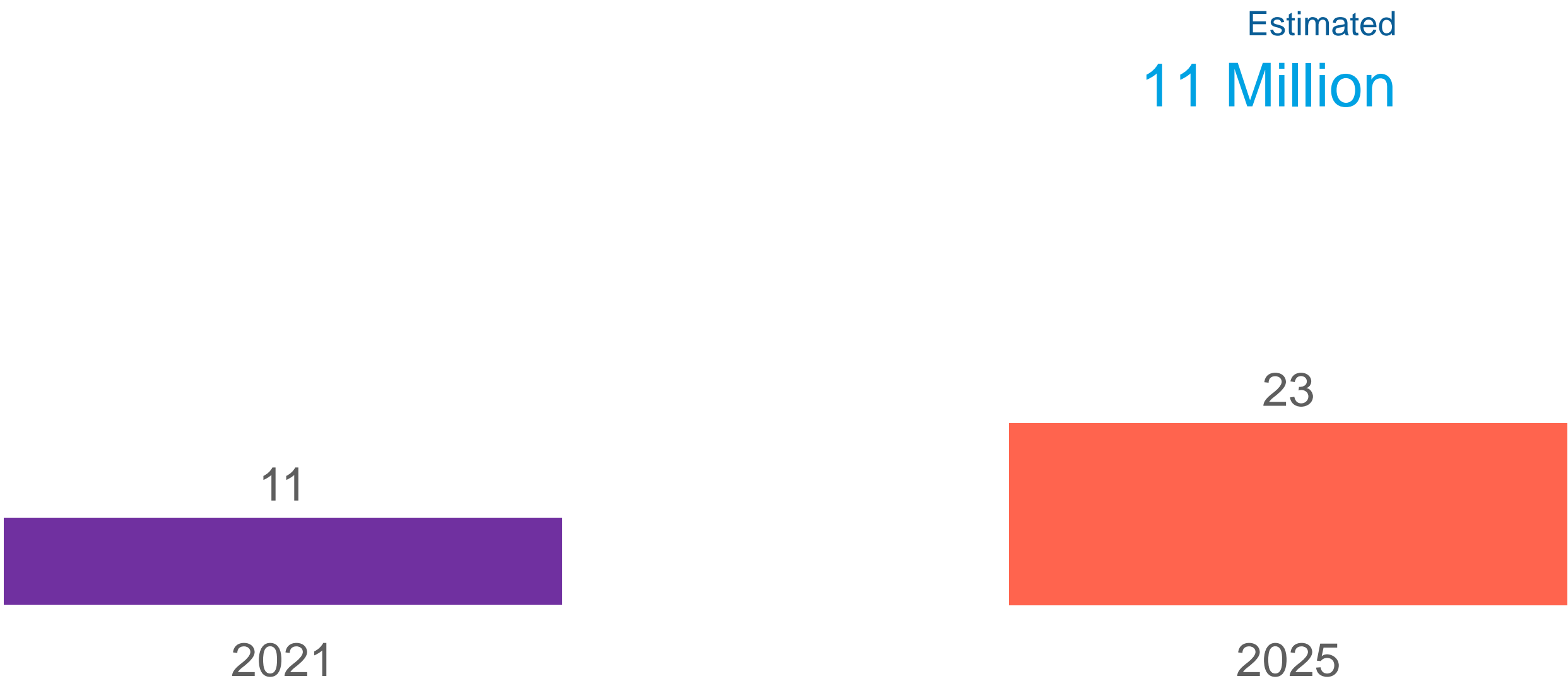
% OWNING A SMARTPHONE



Smart Watch Ownership

TOTAL UK POPULATION 16+

% OWNING A SMART WATCH



Tablet Ownership

TOTAL UK POPULATION 16+

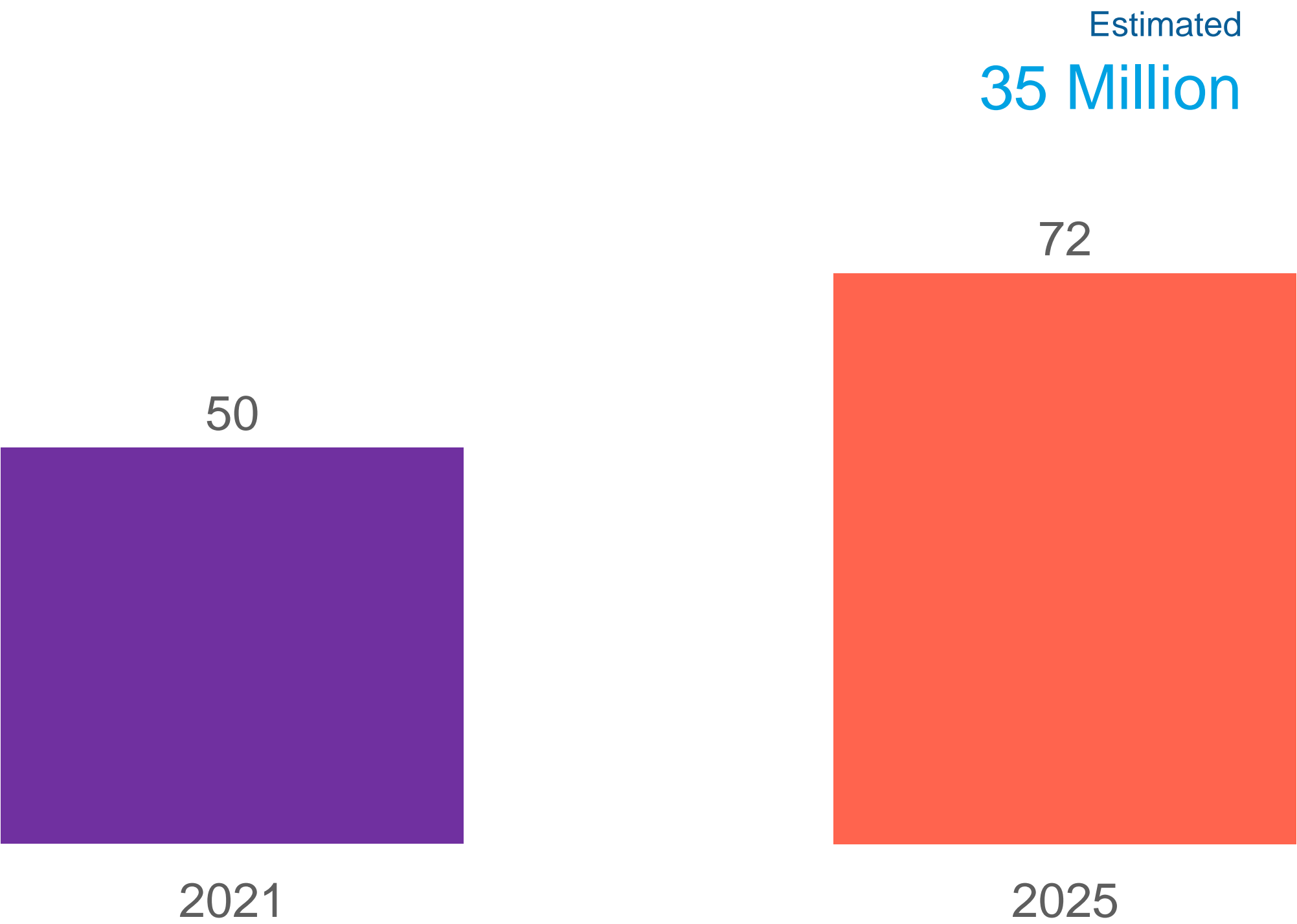
% OWNING A SMARTPHONE



Smart TV Ownership

TOTAL UK POPULATION 16+

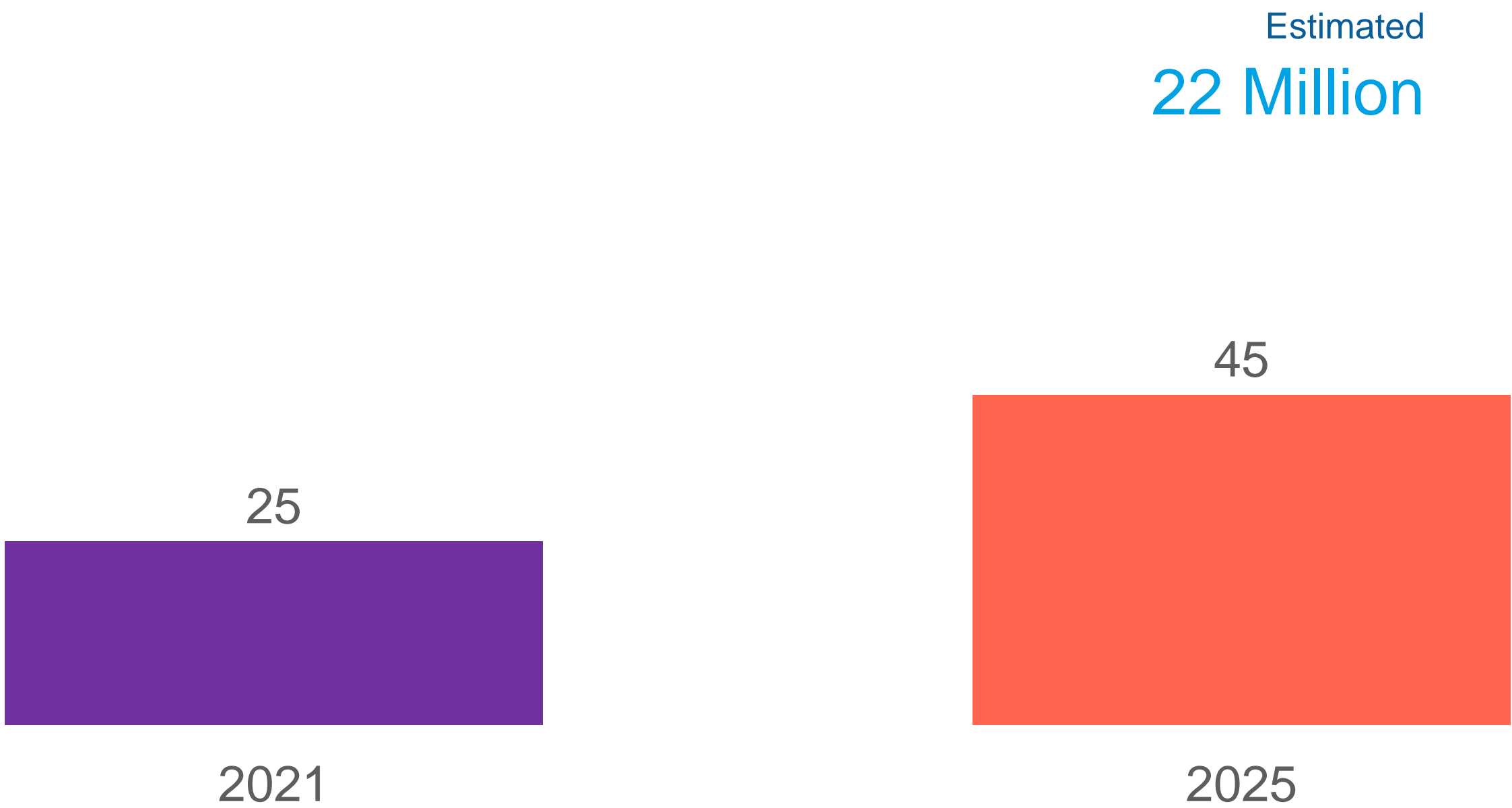
% OWNING A SMART TV



Smart Speaker Ownership

TOTAL UK POPULATION 16+

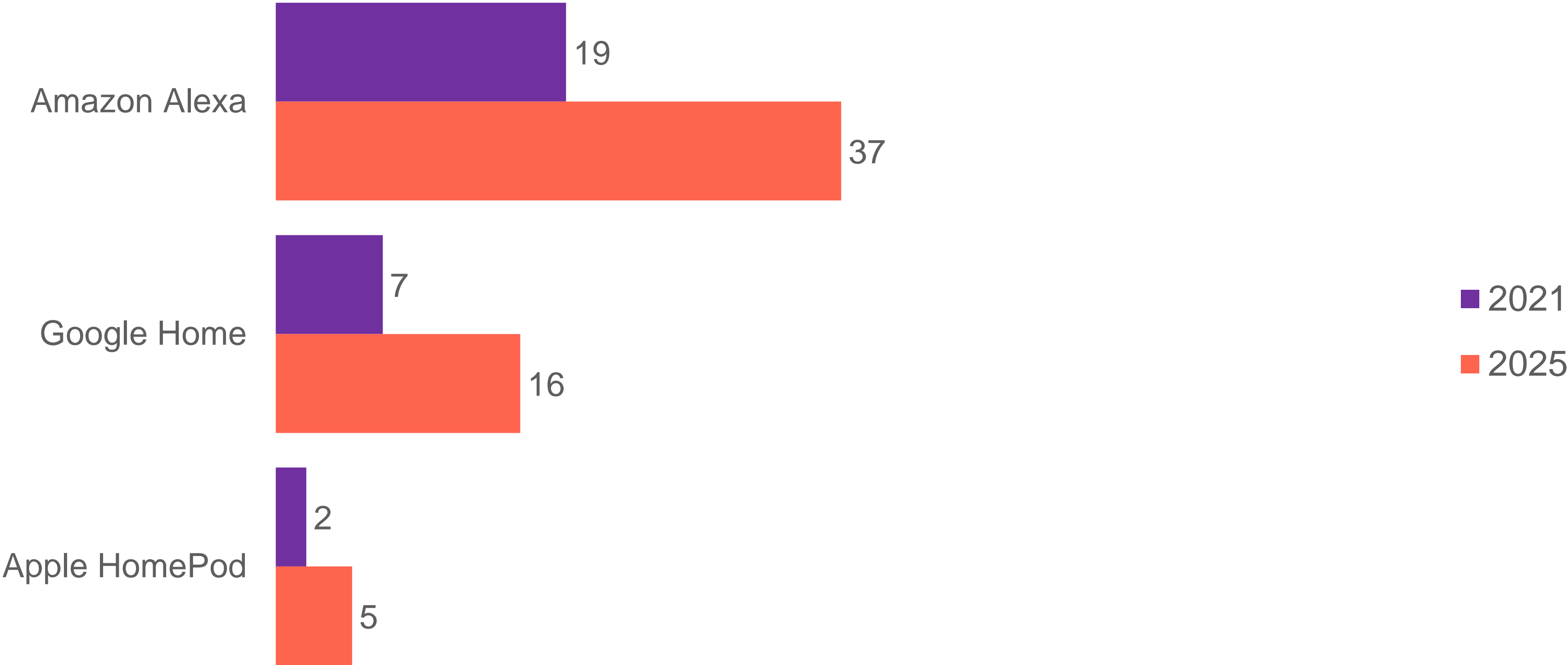
% OWNING A SMART SPEAKER



Smart Speaker Ownership

TOTAL UK POPULATION 16+

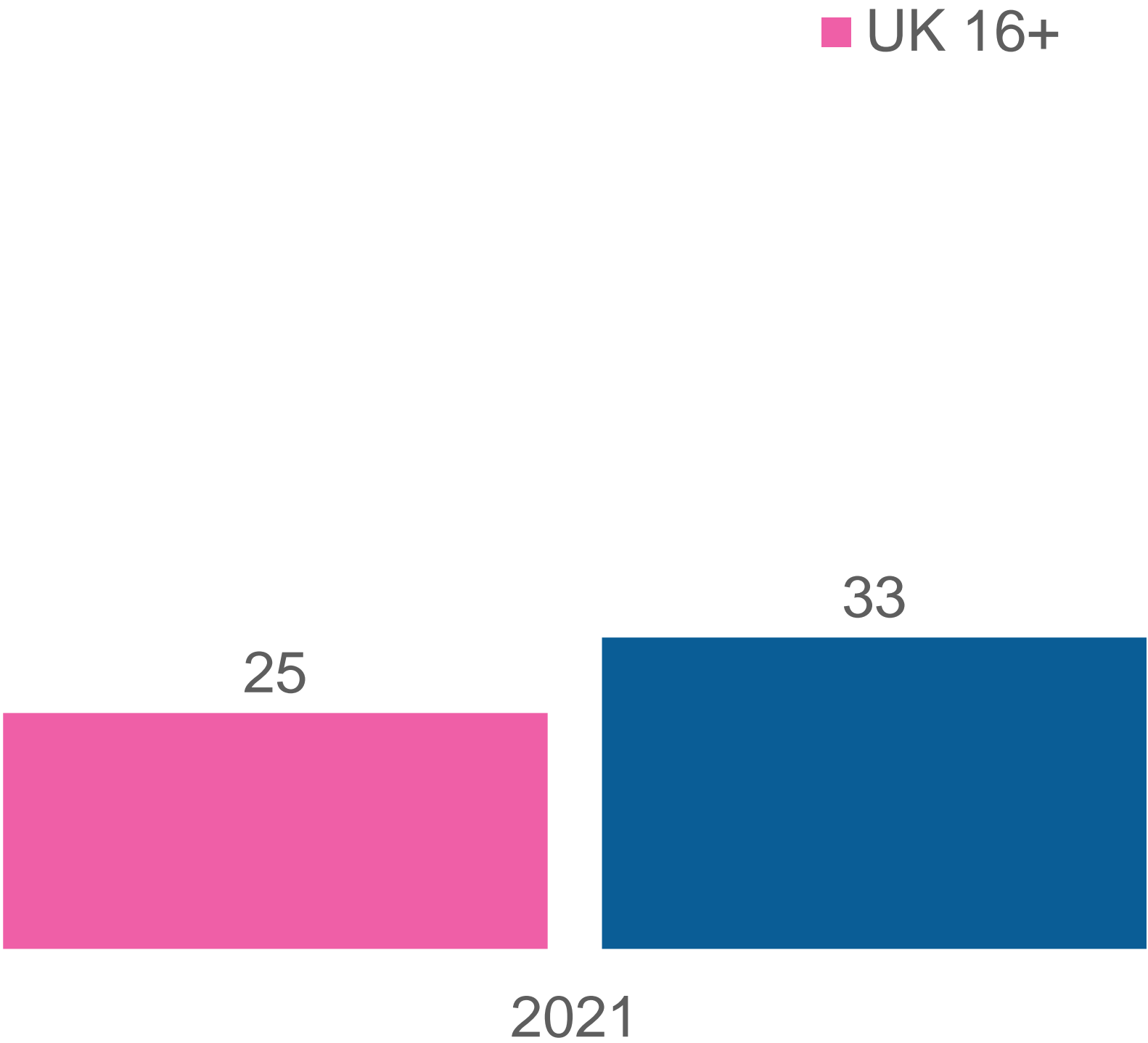
% OWNING SMART SPEAKER



Smart Speaker Ownership

TOTAL POPULATIONS AGE 16+

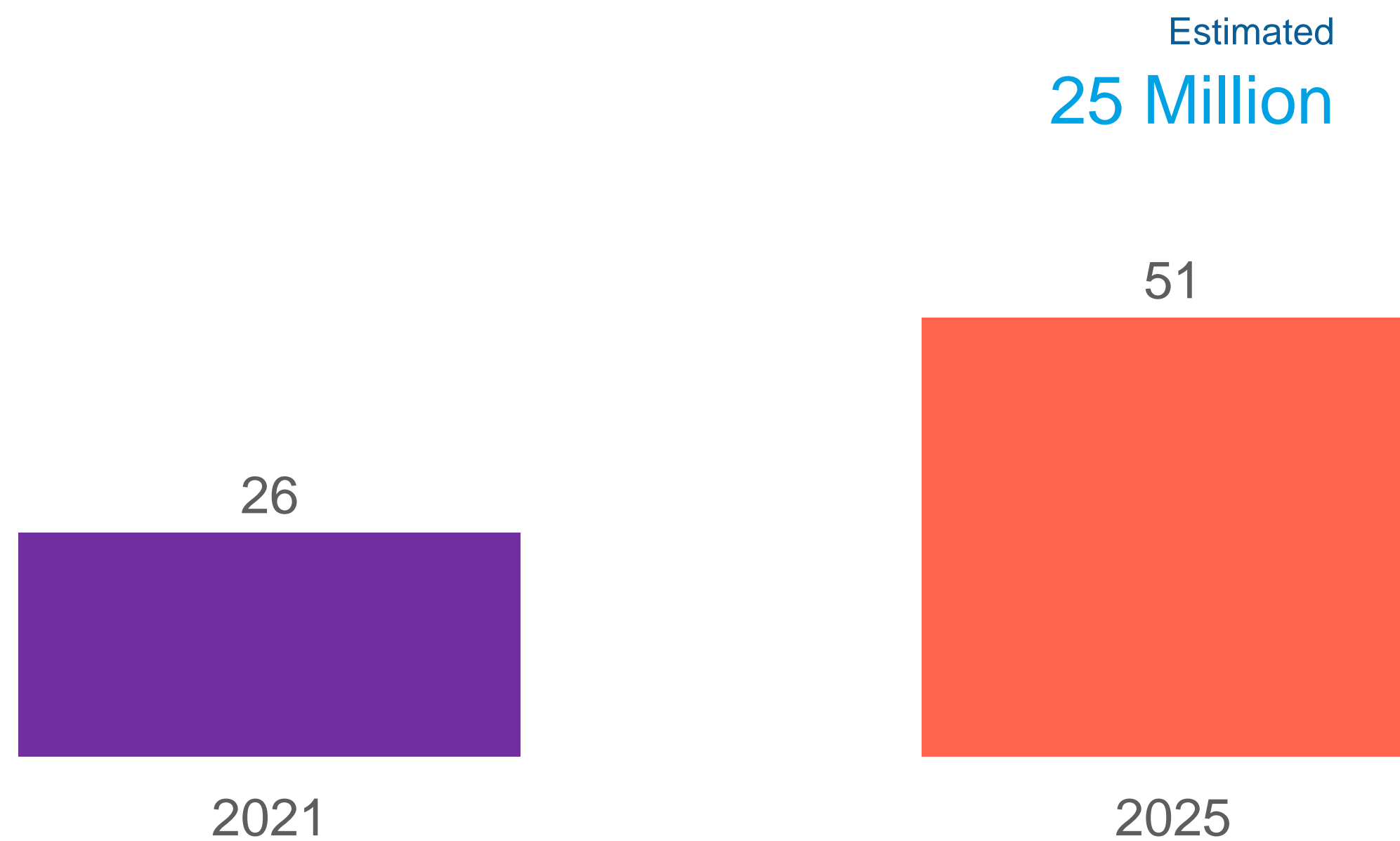
% OWNING SMART SPEAKER



Bluetooth-Enabled Wireless Headphones Ownership

TOTAL UK POPULATION 16+

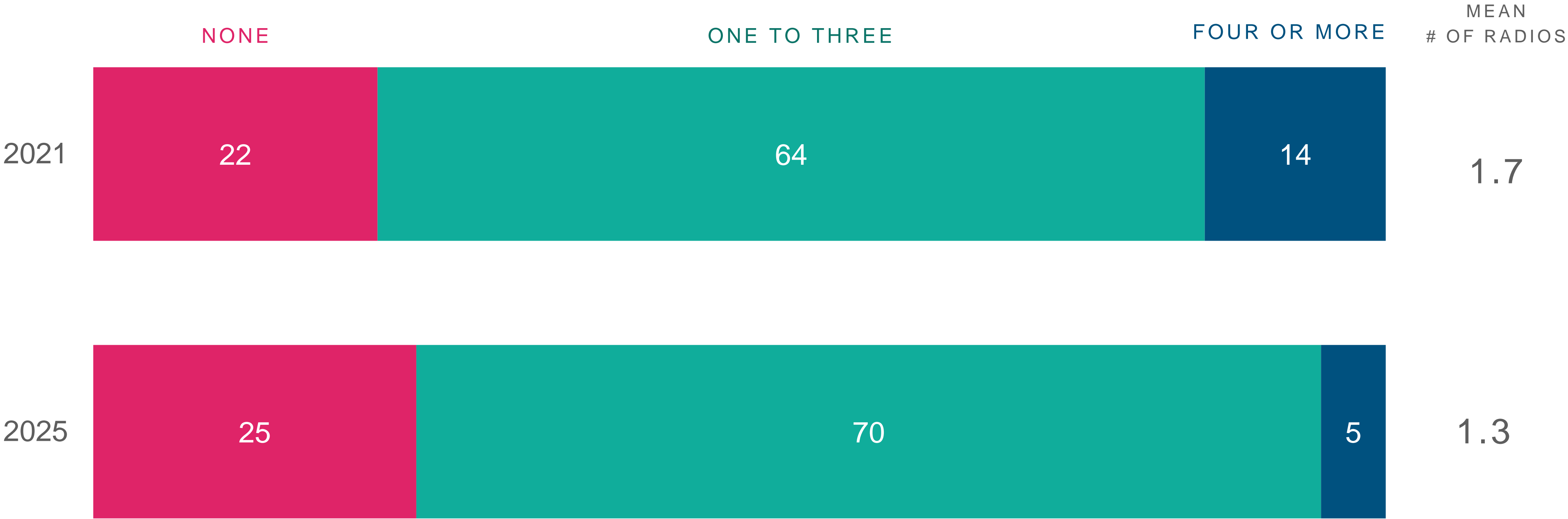
% OWNING BLUETOOTH ENABLED WIRELESS HEADPHONES



Number of Radios in Household

TOTAL UK POPULATION 16+

% OWNING NUMBER OF RADIOS



Gaming in Last Week

TOTAL UK POPULATION 16+

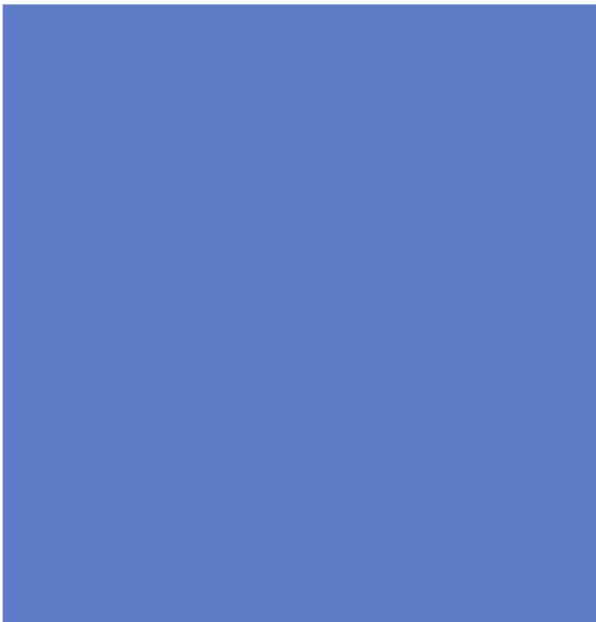
% PLAYED VIDEO GAME IN LAST WEEK

Played games on mobile device



32

Played video games on gaming system



22



Audiobook Listening in Last Year

TOTAL UK POPULATION 16+

% LISTENED TO AN AUDIOBOOK IN THE LAST YEAR



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Social Media



Social Media Usage

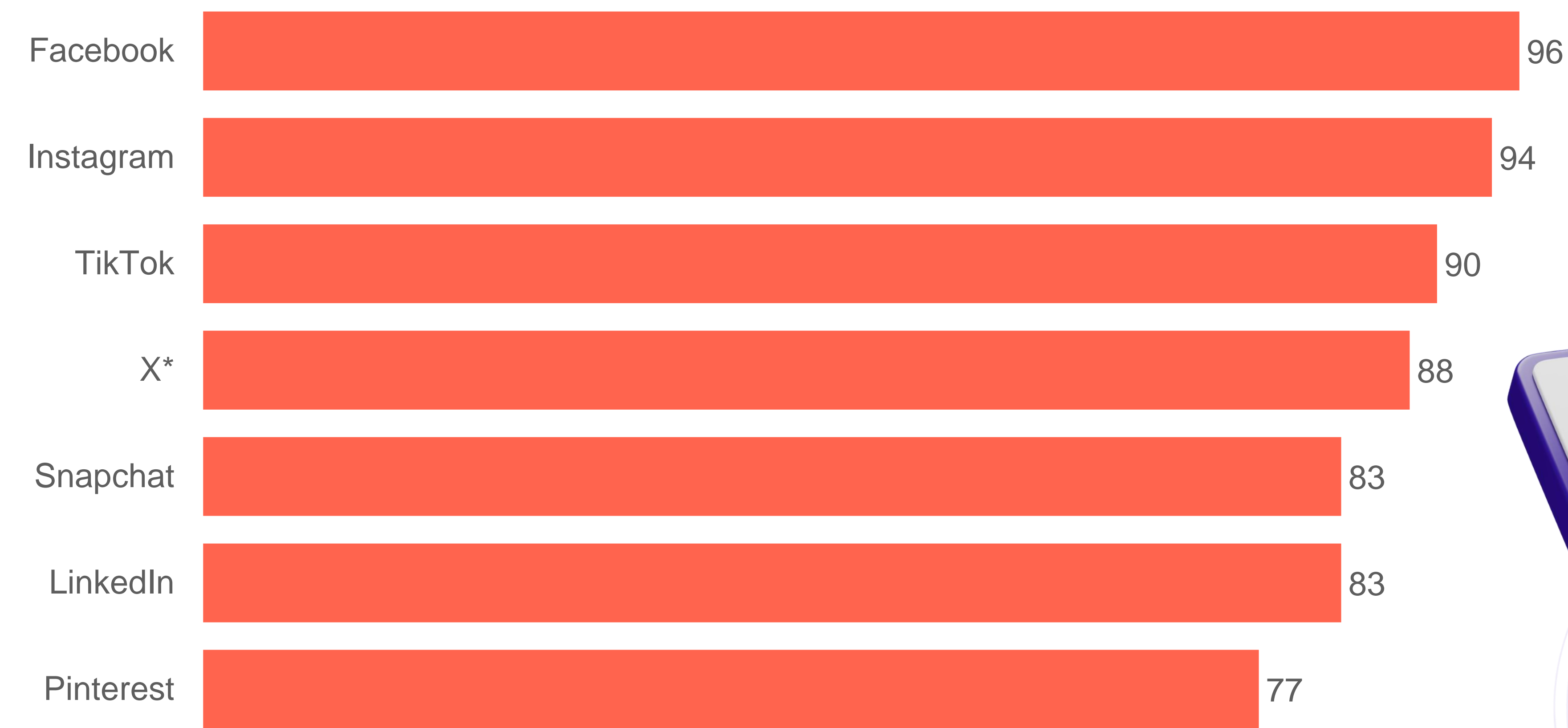
TOTAL UK POPULATION 16+
% CURRENTLY EVER USE SOCIAL MEDIA



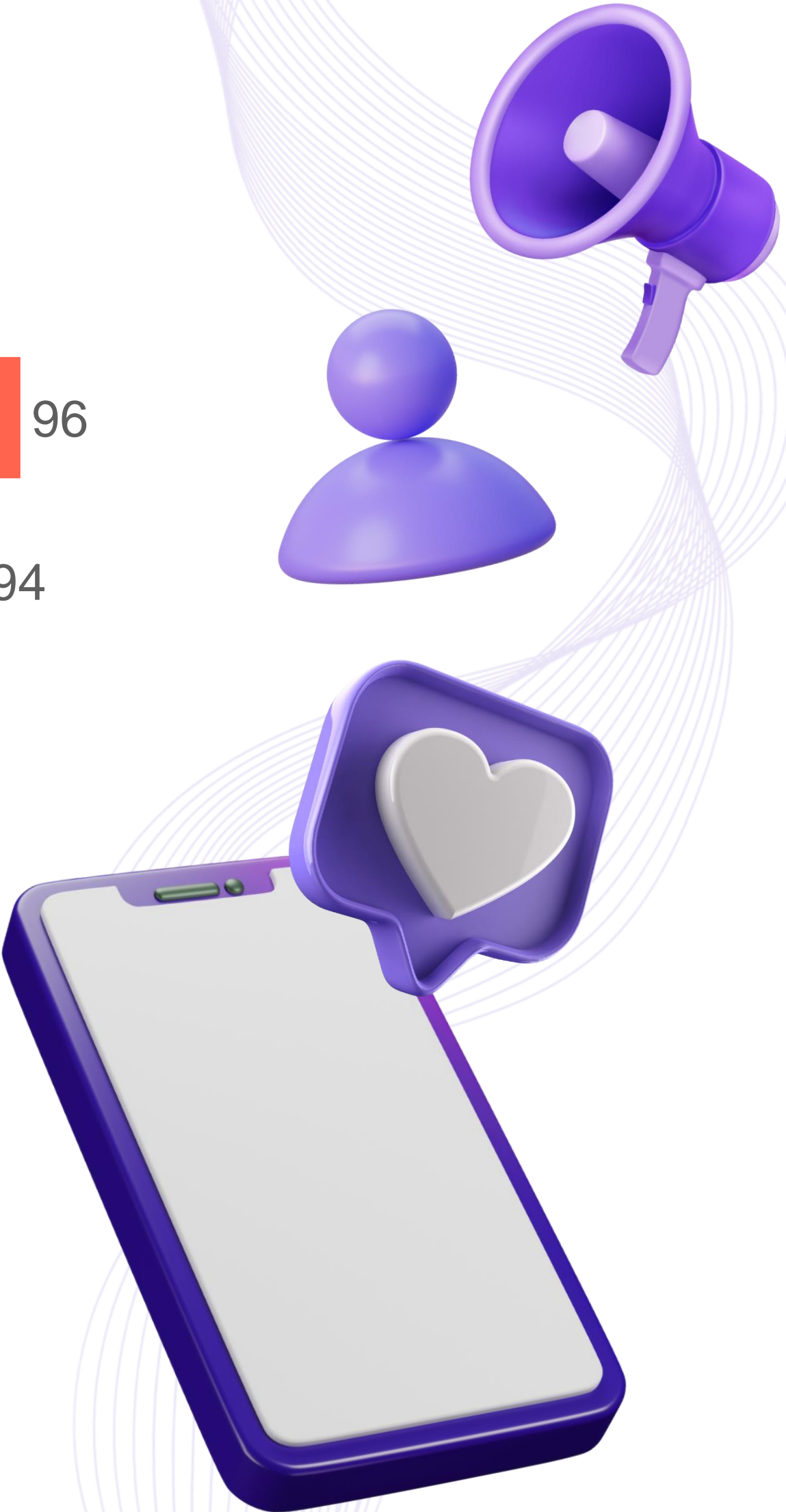
Social Media Brand Awareness

TOTAL UK POPULATION 16+

% AWARE OF SOCIAL MEDIA BRAND



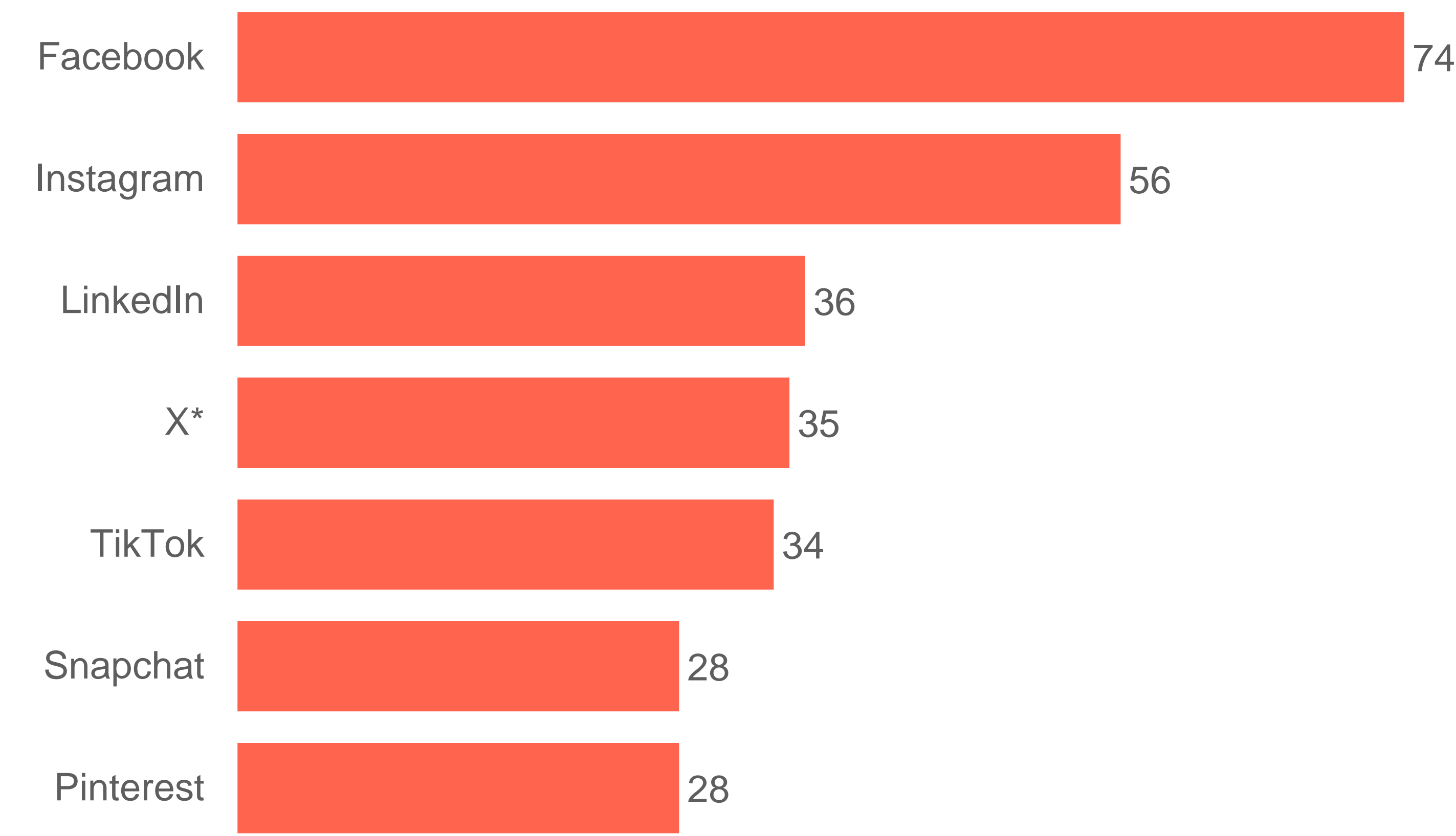
*ASKED AS: "X, FORMERLY KNOWN AS TWITTER"



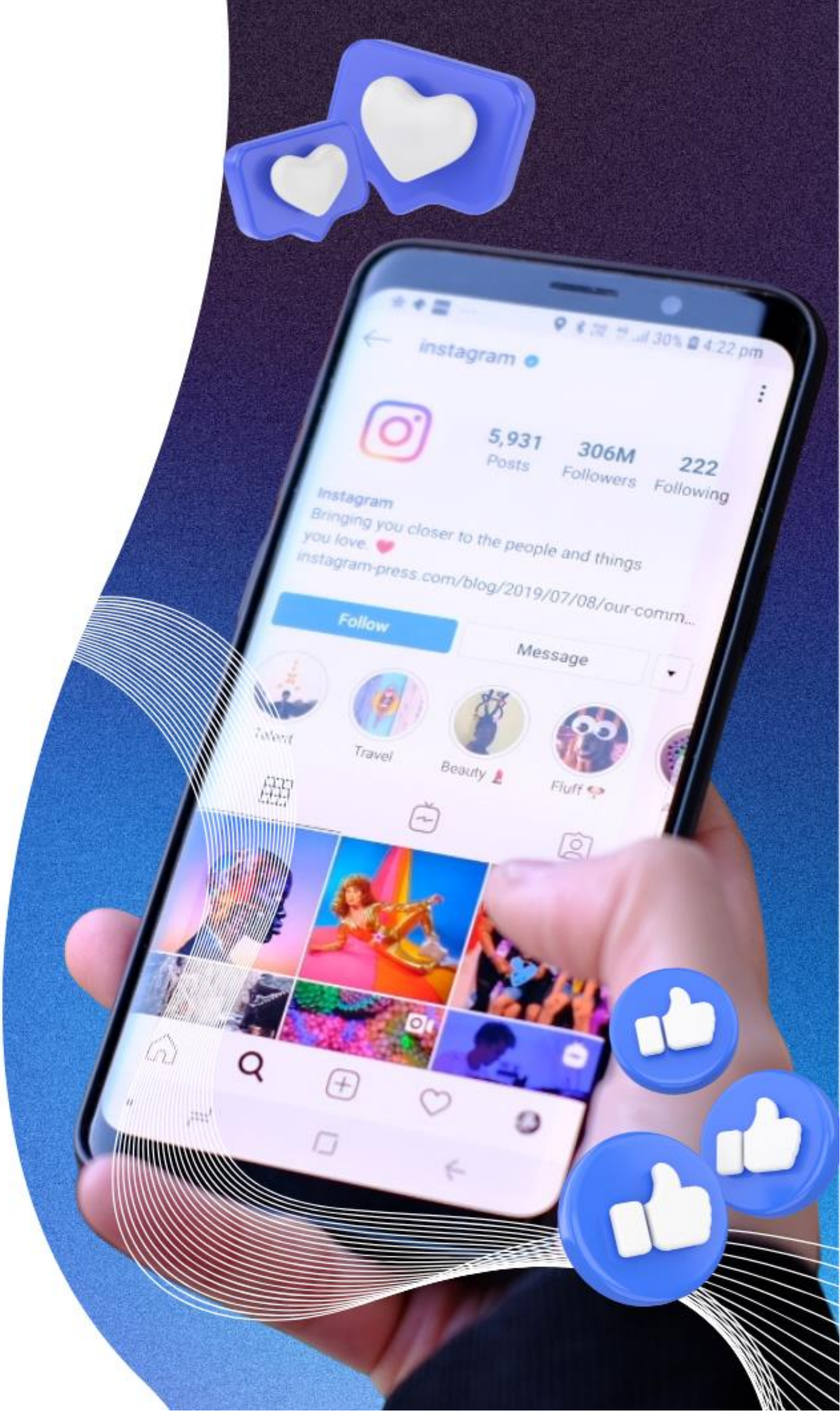
Social Media Brand Usage

TOTAL UK POPULATION 16+

% CURRENTLY USE SOCIAL MEDIA BRAND



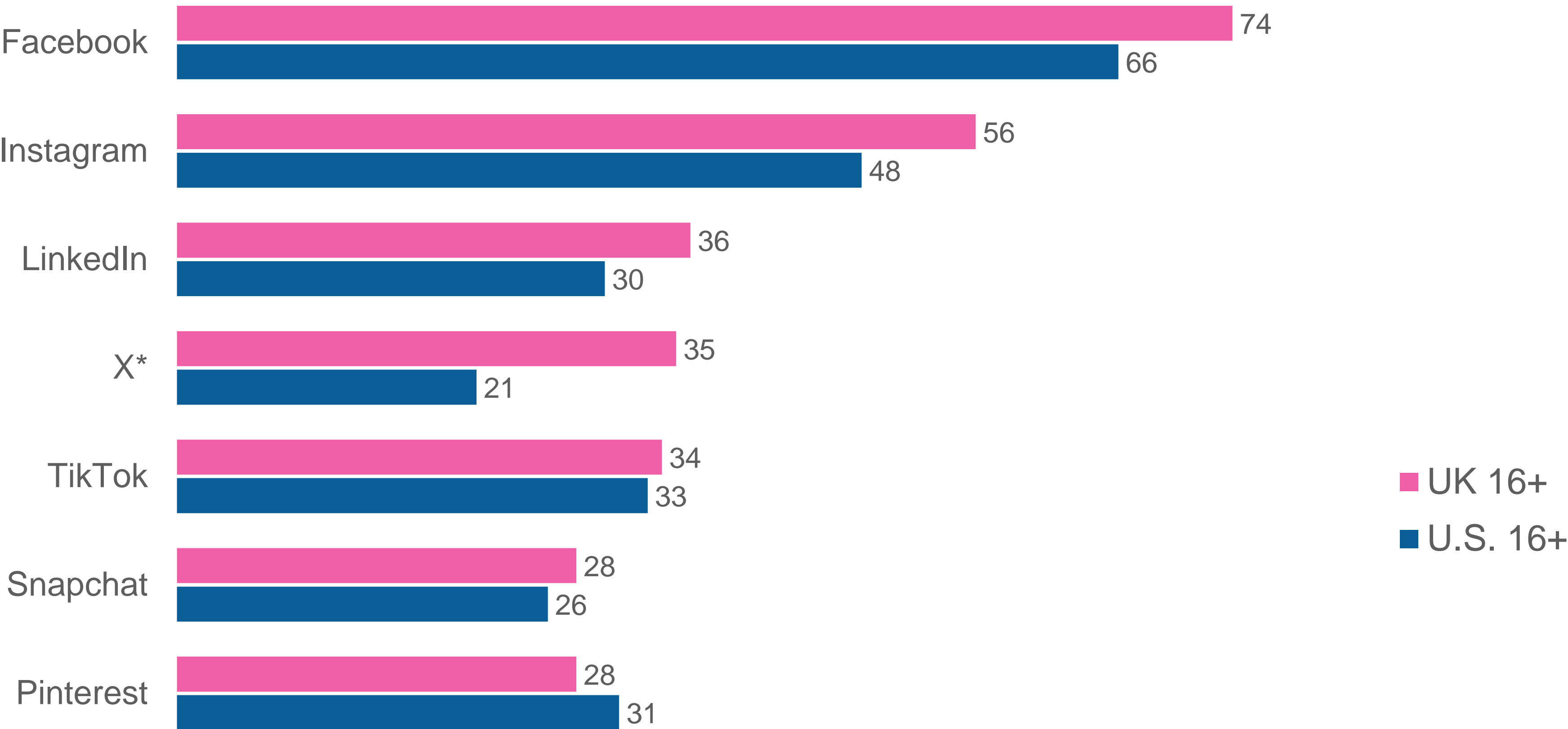
*ASKED AS: "X, FORMERLY KNOWN AS TWITTER"



Social Media Brand Usage

TOTAL POPULATIONS 16+

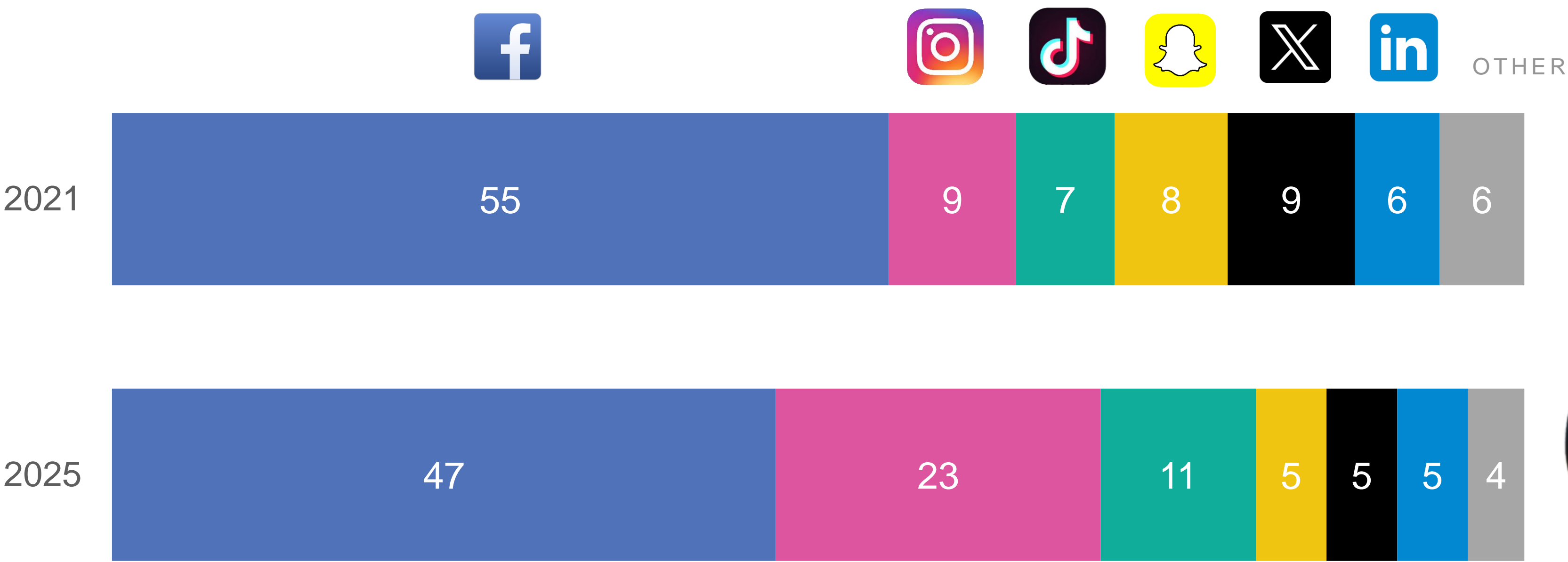
% USING SOCIAL MEDIA BRAND



*ASKED AS: "X, FORMERLY KNOWN AS TWITTER"

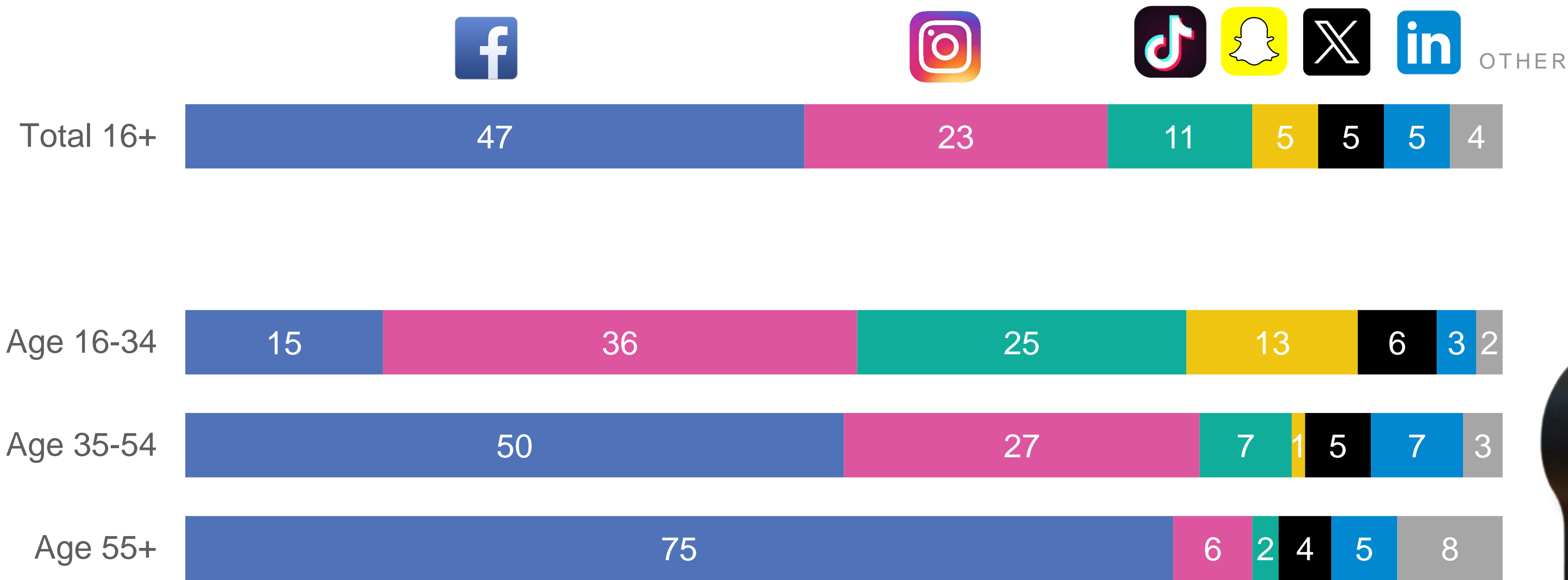
Social Media Brand Used Most Often

BASE: UK SOCIAL MEDIA USERS 16+



Social Media Brand Used Most Often

BASE: UK SOCIAL MEDIA USERS 16+



 THE INFINITE DIAL[®] UK 2025

Online Audio



Monthly Online Audio Listening

TOTAL UK POPULATION 16+

% LISTENED TO ONLINE AUDIO IN LAST MONTH

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

Estimated
40 Million

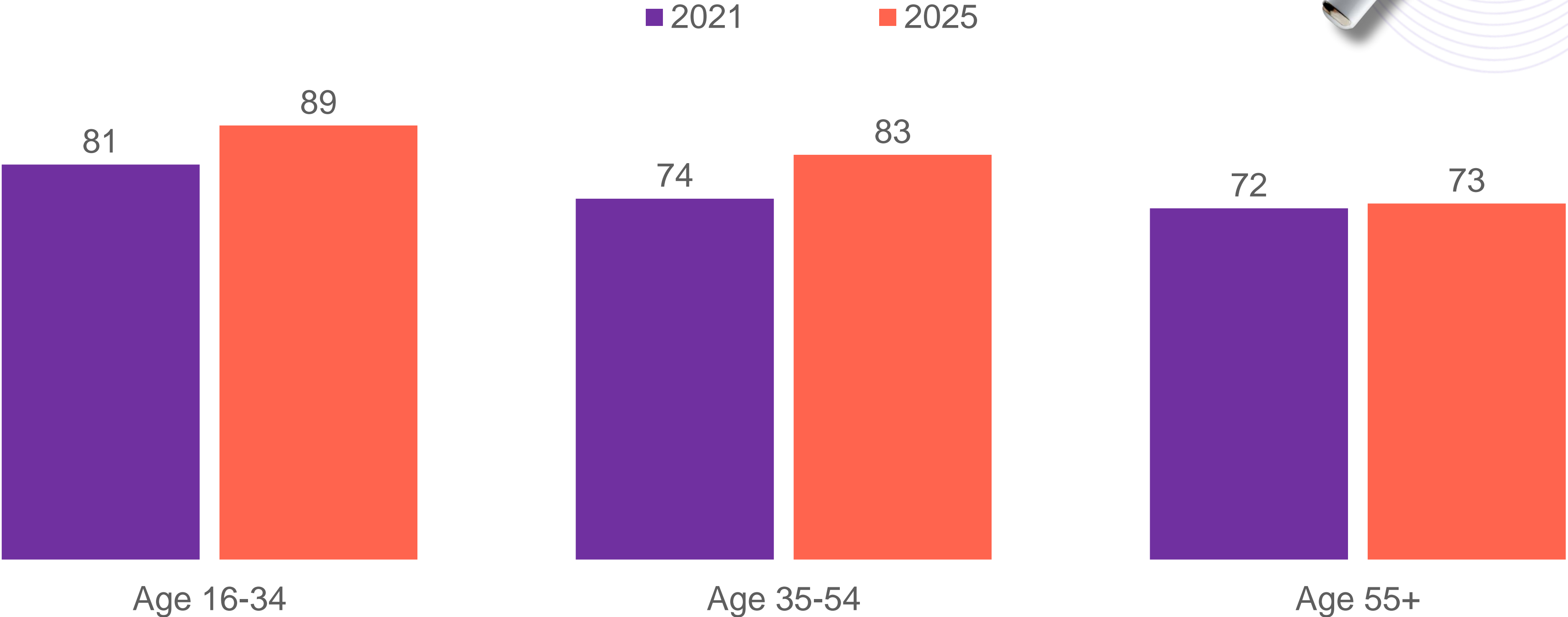


Monthly Online Audio Listening

TOTAL UK POPULATION 16+

% LISTENED TO ONLINE AUDIO IN LAST MONTH

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



Weekly Online Audio Listening

TOTAL UK POPULATION 16+

% LISTENED TO ONLINE AUDIO IN LAST WEEK

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

Estimated
36 Million



Weekly Online Audio Listening

TOTAL POPULATIONS AGE 16+

% LISTENED TO ONLINE AUDIO IN LAST WEEK

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



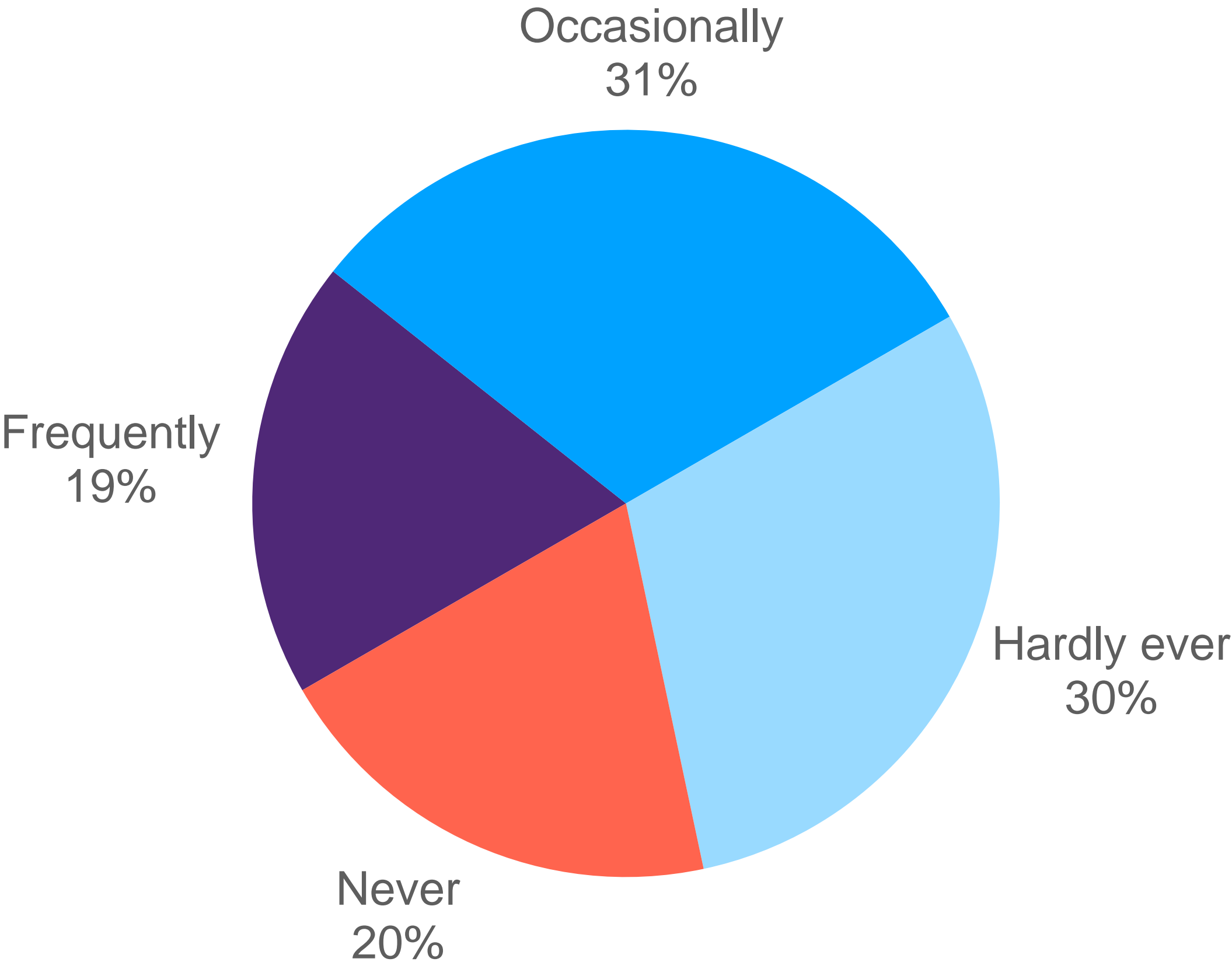
■ UK 16+ ■ U.S. 16+



Listening to Audio with Other People

TOTAL UK POPULATION 16+

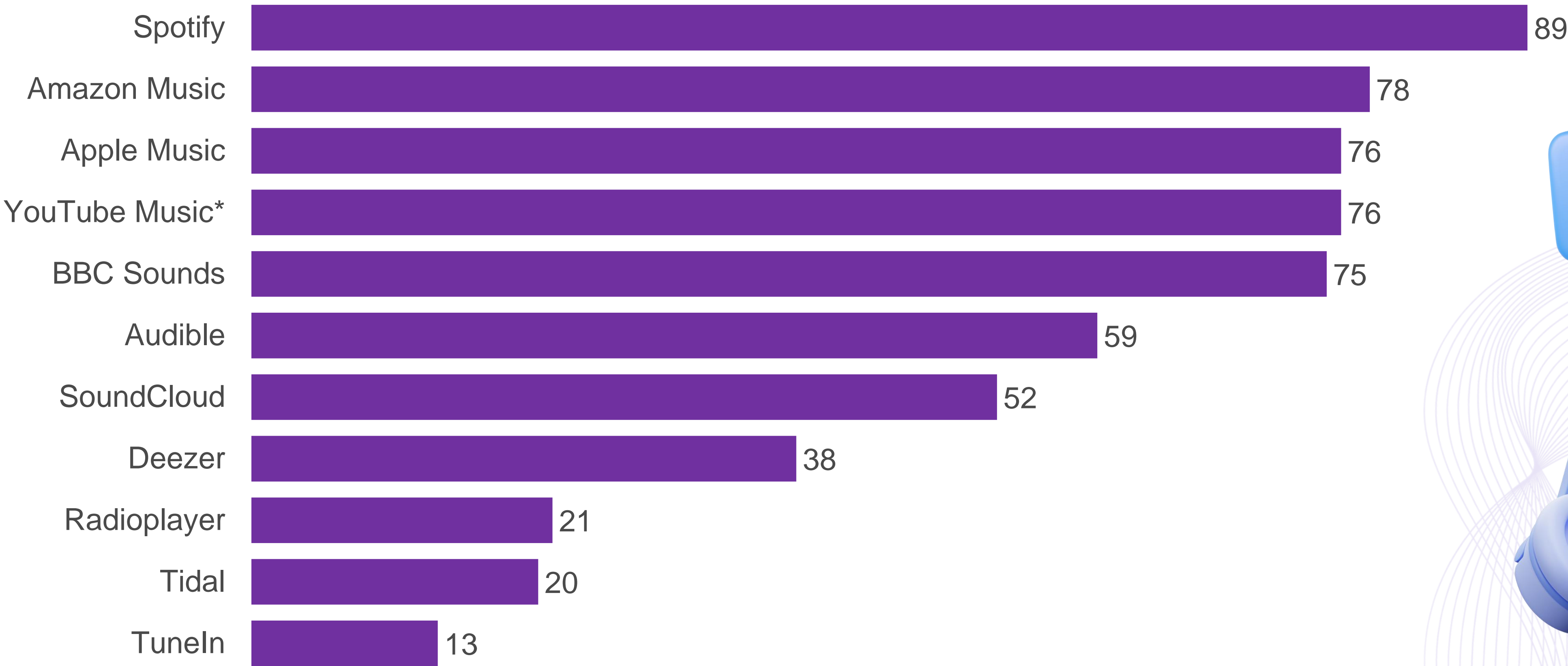
“In general, how often do you listen to audio with other people?”



Online Audio Brand Awareness

TOTAL UK POPULATION 16+

% AWARE OF ONLINE AUDIO BRAND

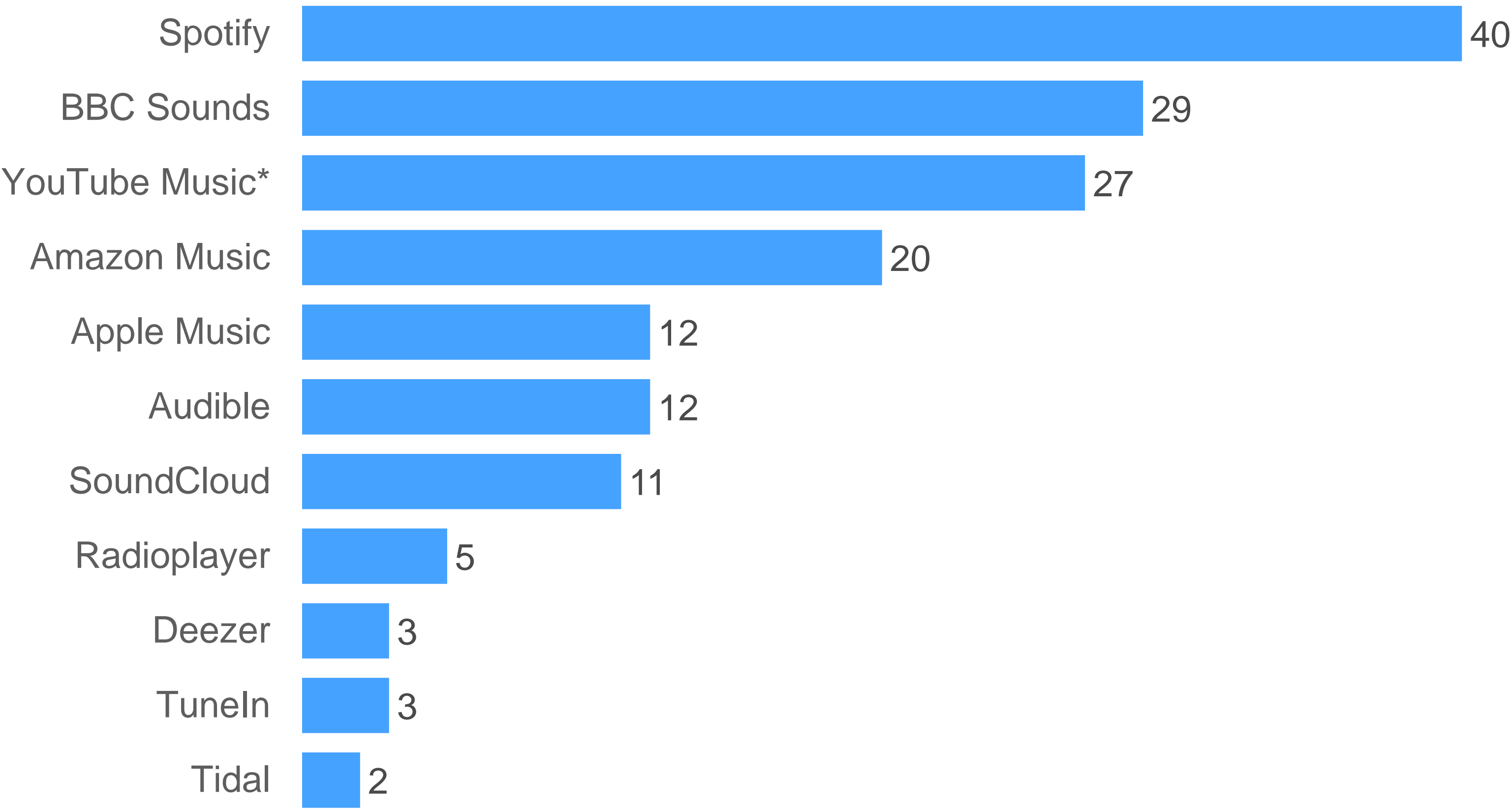


*ASKED AS: "YOUTUBE MUSIC, THE STREAMING MUSIC SERVICE FROM YOUTUBE"

Online Audio Brands Listened to in Last Month

TOTAL UK POPULATION 16+

% LISTENED TO ONLINE AUDIO BRAND IN THE LAST MONTH

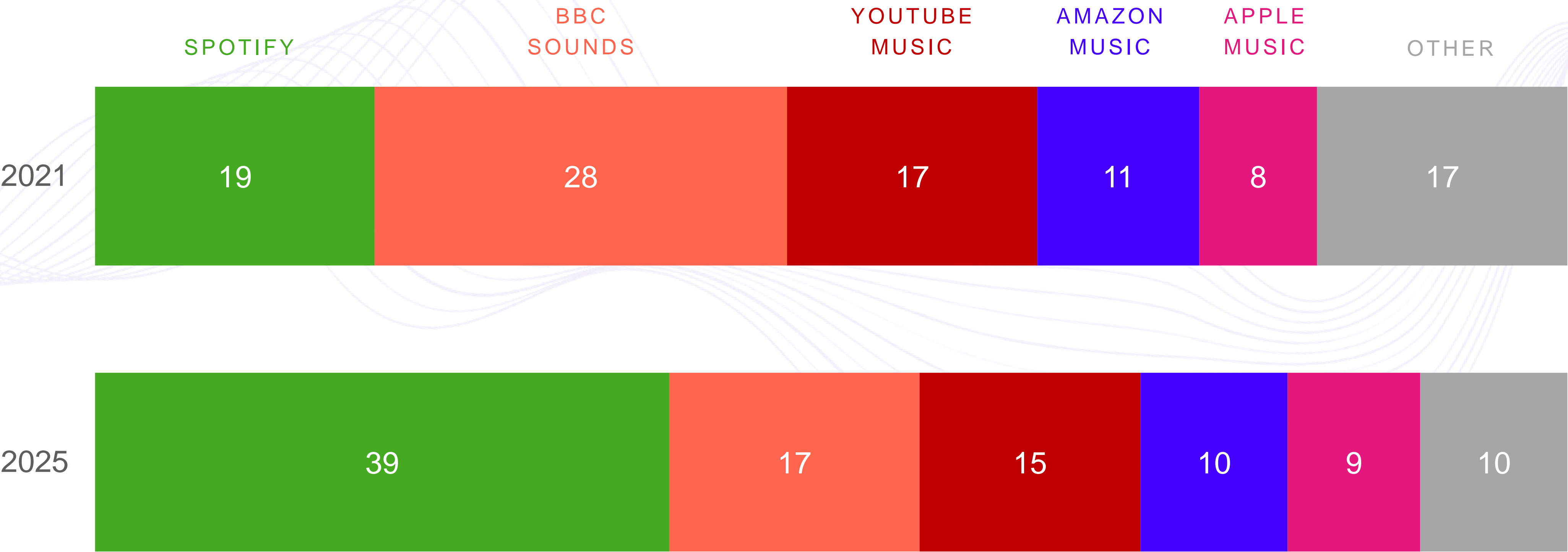


*ASKED AS: "YOUTUBE MUSIC, THE STREAMING MUSIC SERVICE FROM YOUTUBE"



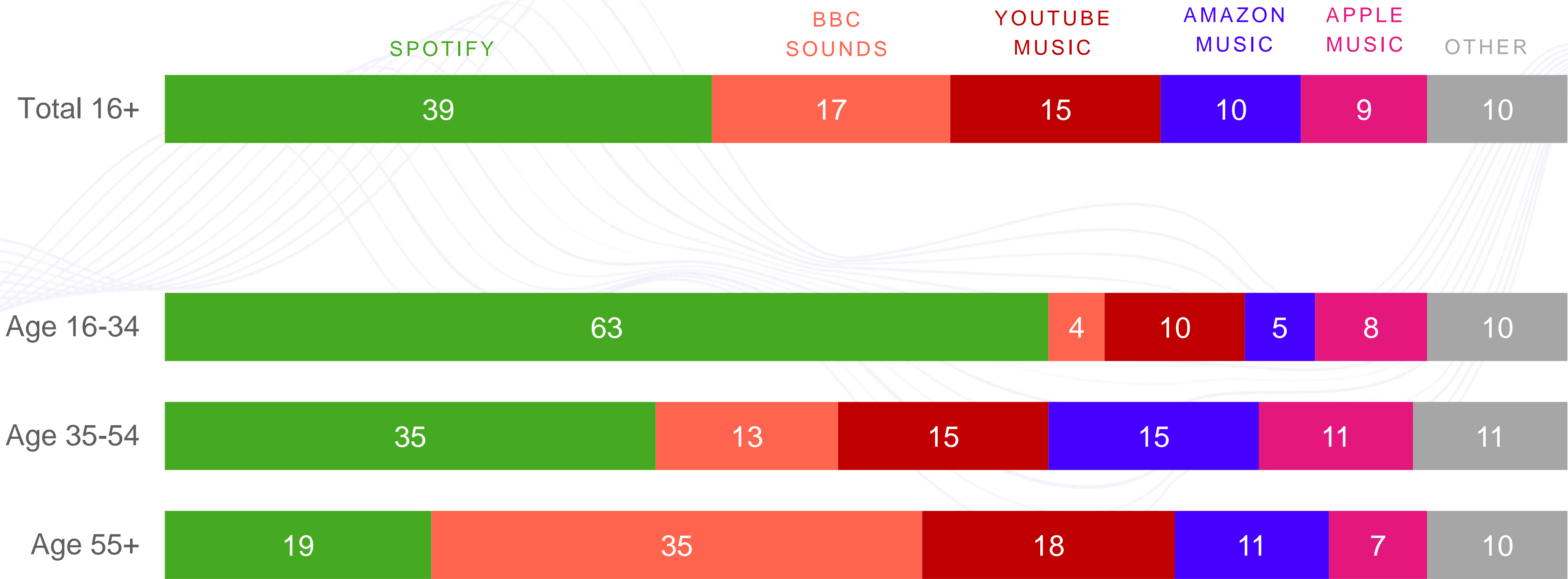
Online Audio Brand Used Most Often

BASE: UK 16+ ONLINE AUDIO USERS



Online Audio Brand Used Most Often

BASE: UK 16+ ONLINE AUDIO USERS



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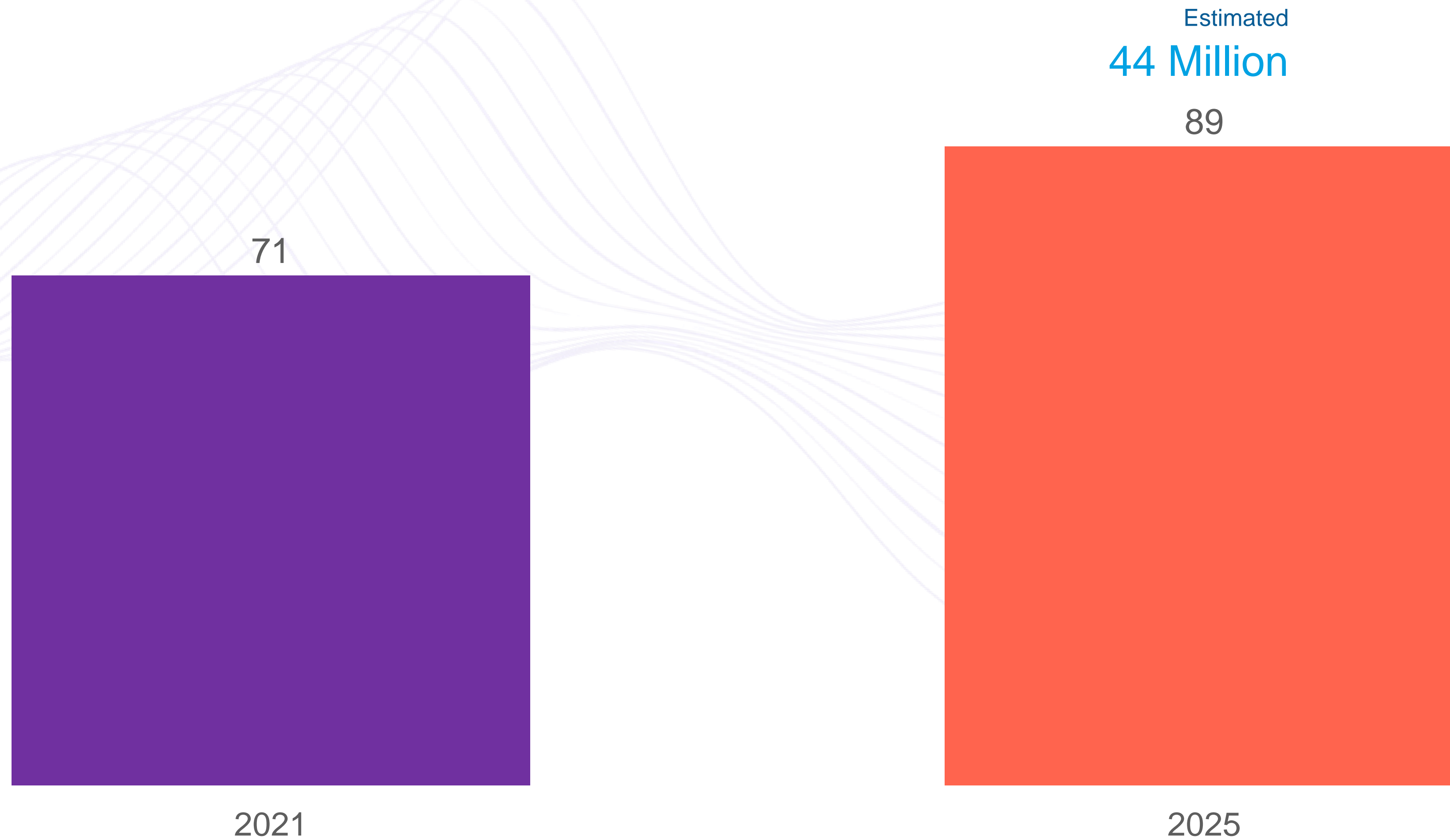
Podcasting



Podcasting Familiarity

TOTAL UK POPULATION 16+

% AWARE OF PODCASTING



Ever Listened to a Podcast

TOTAL UK POPULATION 16+

% EVER LISTENED TO A PODCAST



Service used most often to listen to podcasts

UK Weekly Podcast Listeners Age 15+

Q4 2024



Spotify
33%



YouTube
20%



BBC Sounds
16%

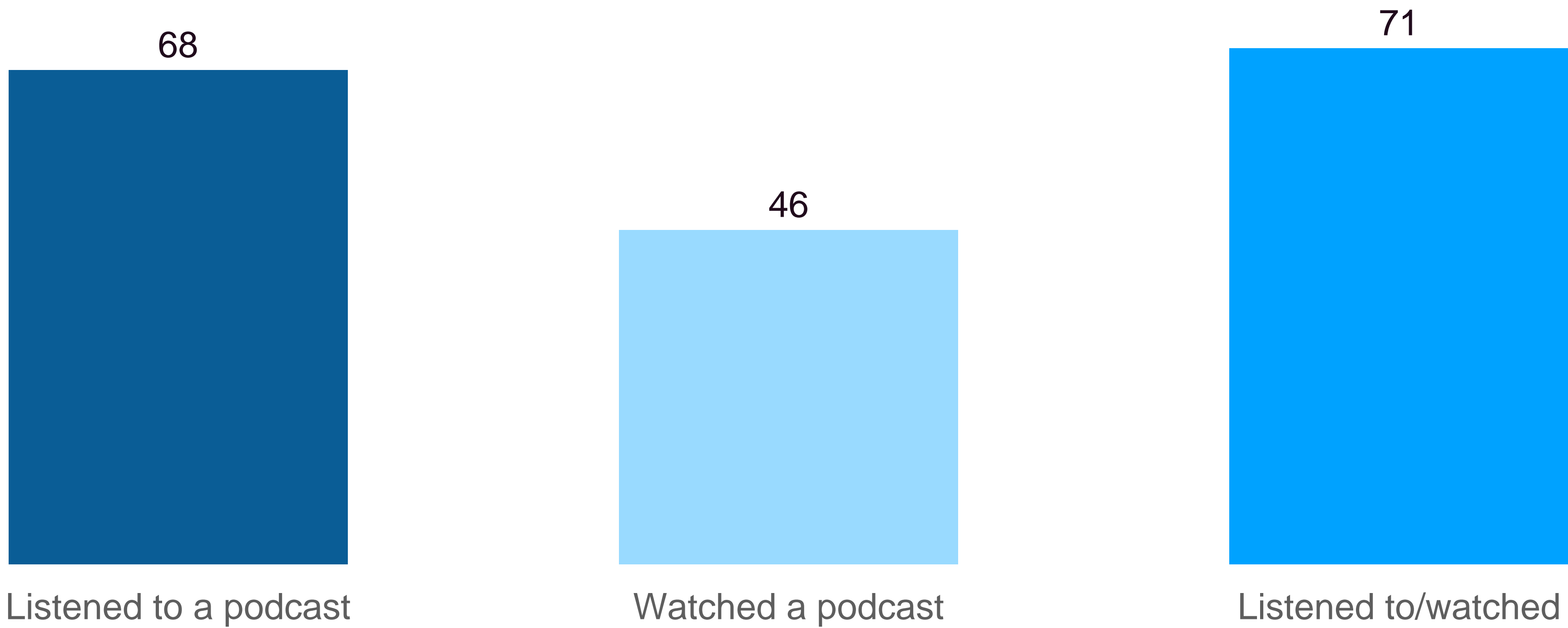


Apple Podcasts
10%

Ever Consumed a Podcast

TOTAL UK POPULATION 16+

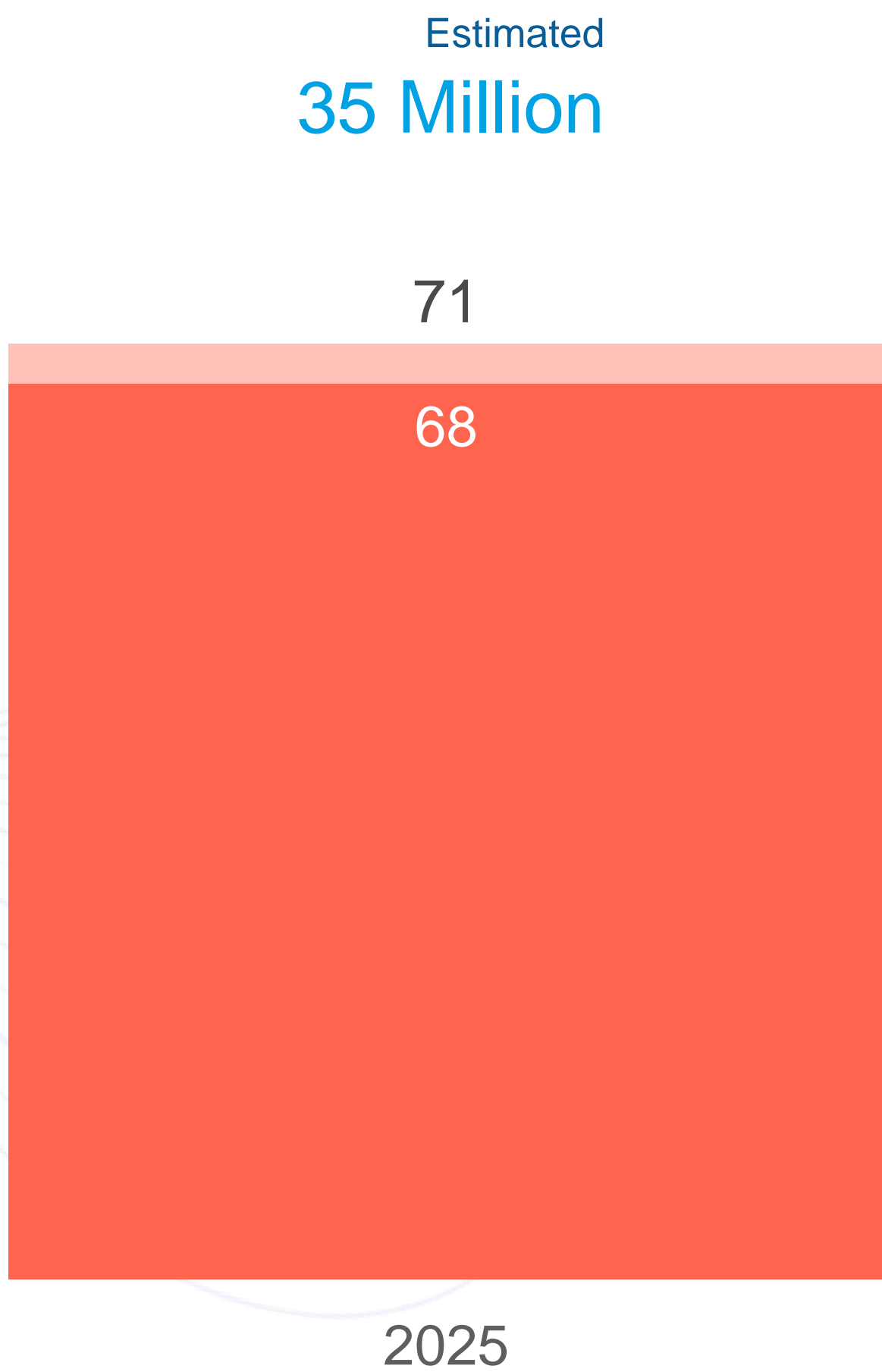
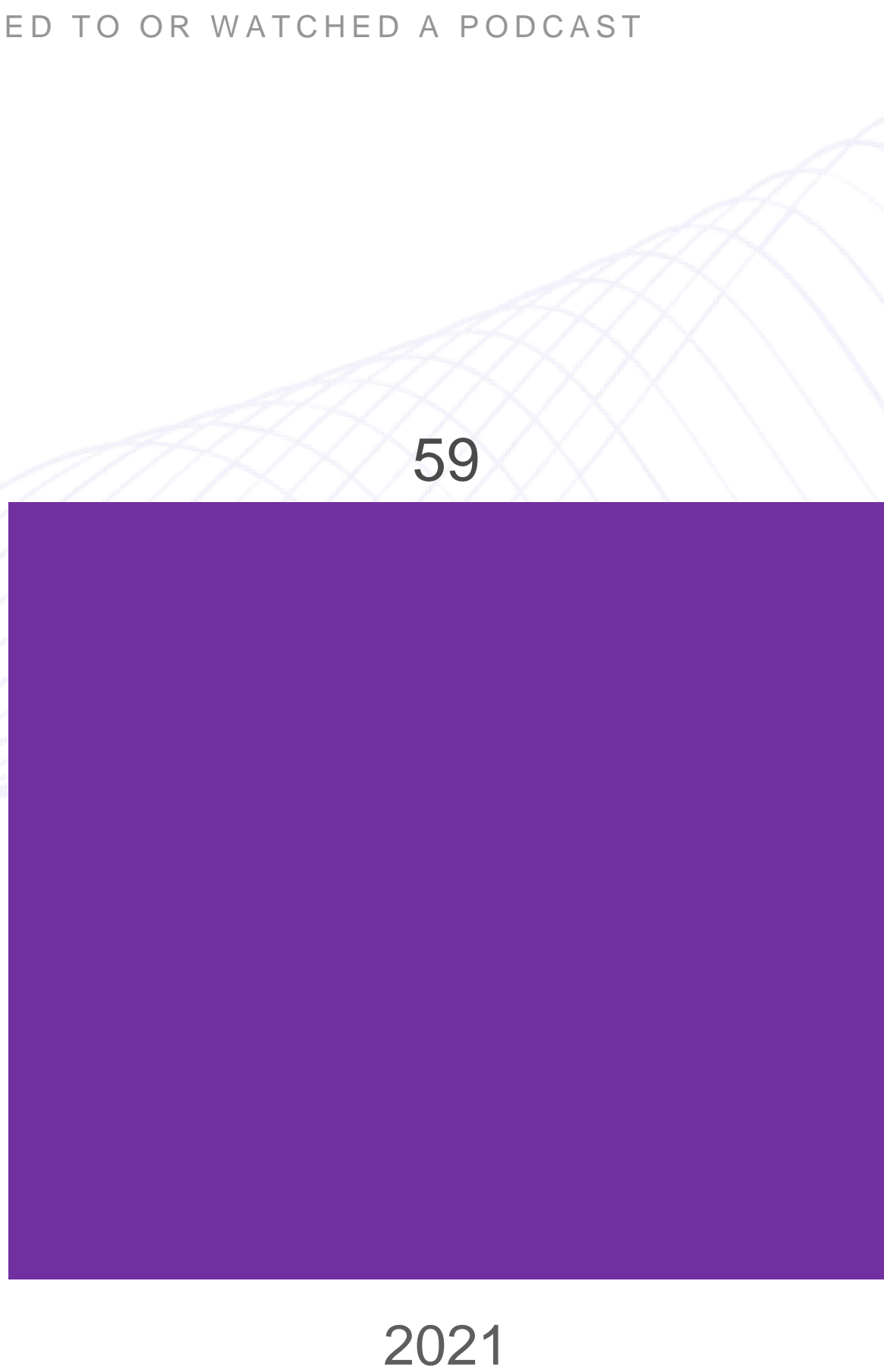
% EVER LISTENED TO OR WATCHED A PODCAST



Ever Consumed a Podcast

TOTAL UK POPULATION 16+

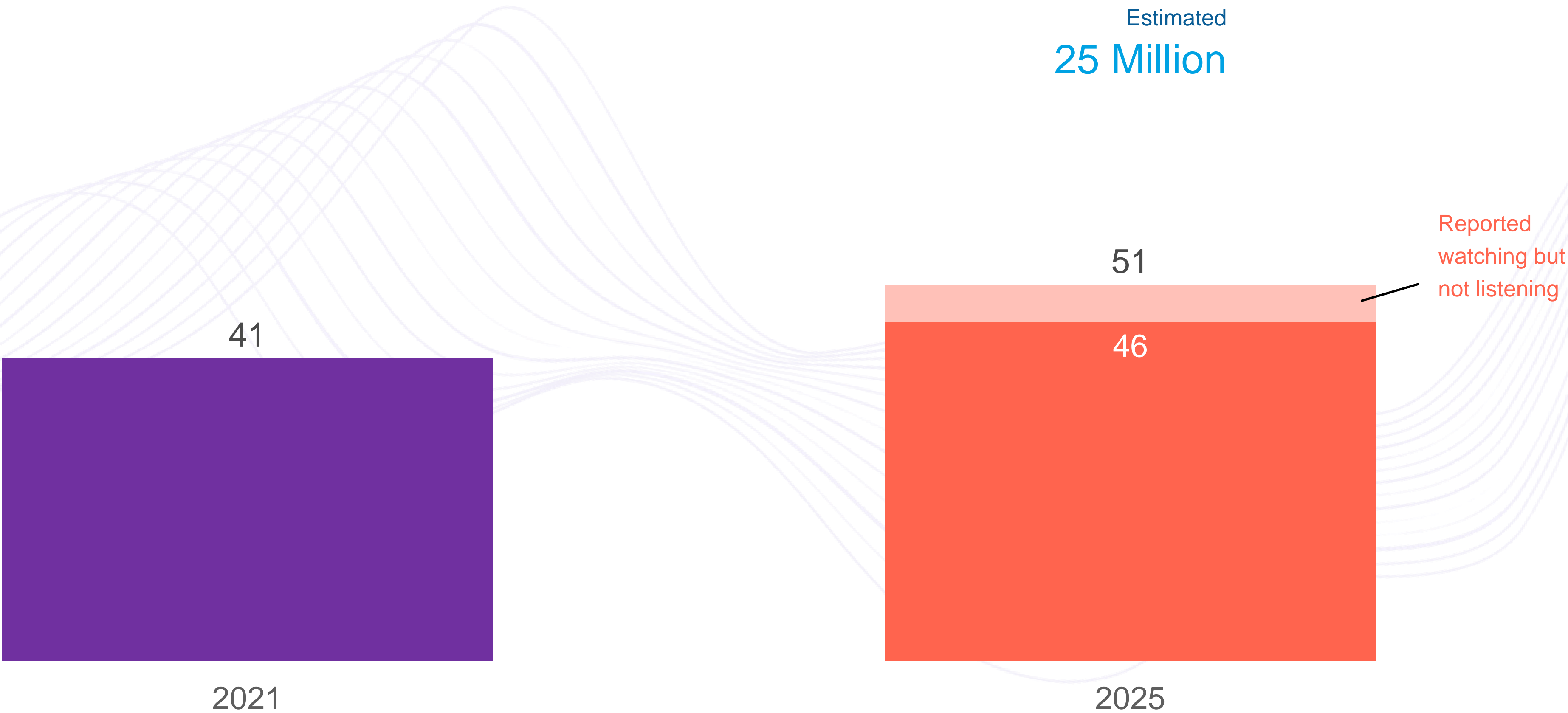
% EVER LISTENED TO OR WATCHED A PODCAST



Monthly Podcast Consumption

TOTAL UK POPULATION 16+

% LISTENED TO OR WATCHED A PODCAST IN LAST MONTH



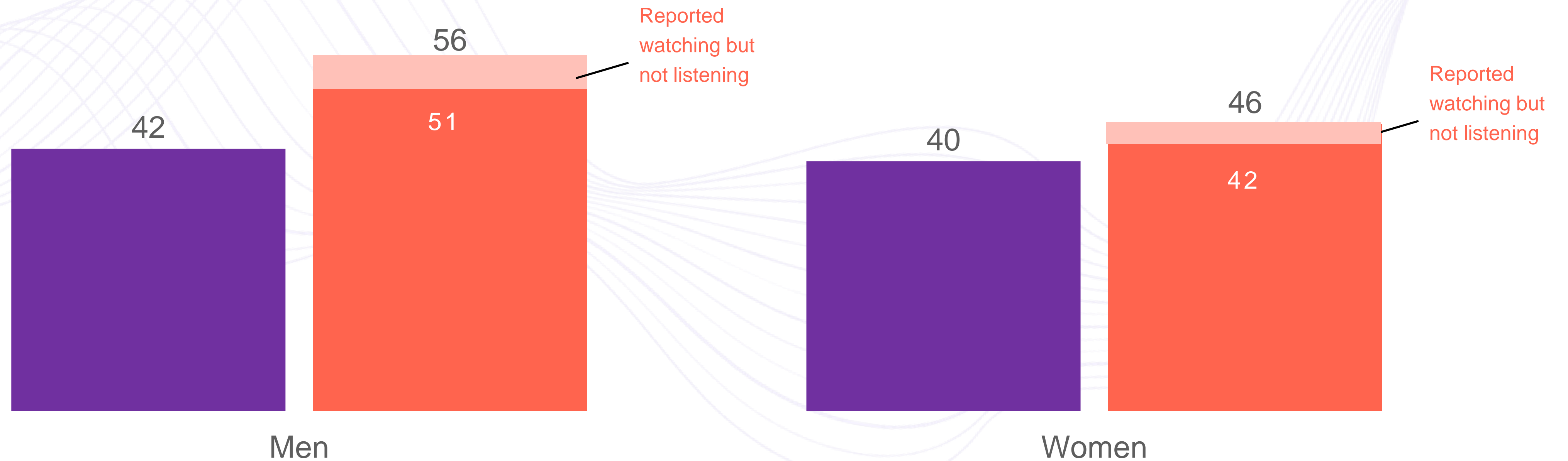
2025: Listened to and/or watched podcasts

Monthly Podcast Consumption

TOTAL UK POPULATION 16+

% LISTENED TO OR WATCHED A PODCAST IN THE LAST MONTH

■ 2021 ■ 2025

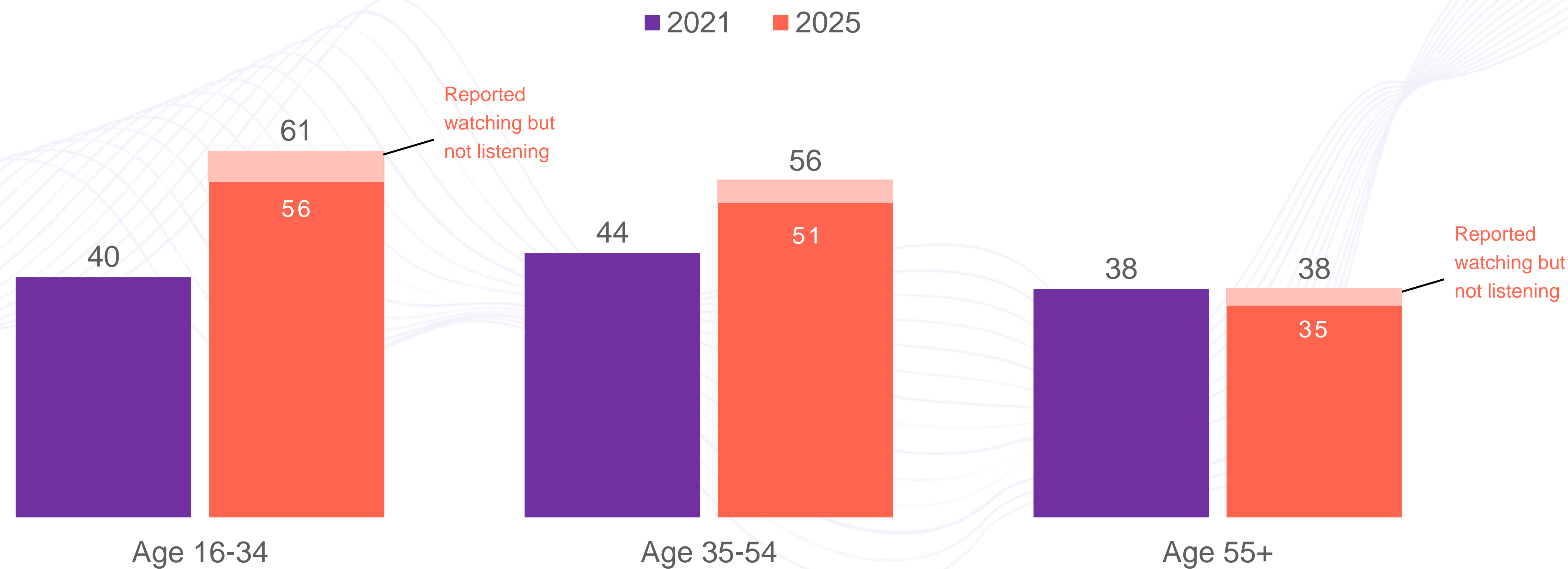


2025: Listened to and/or watched podcasts

Monthly Podcast Consumption

TOTAL UK POPULATION 16+

% LISTENED TO OR WATCHED A PODCAST IN THE LAST MONTH

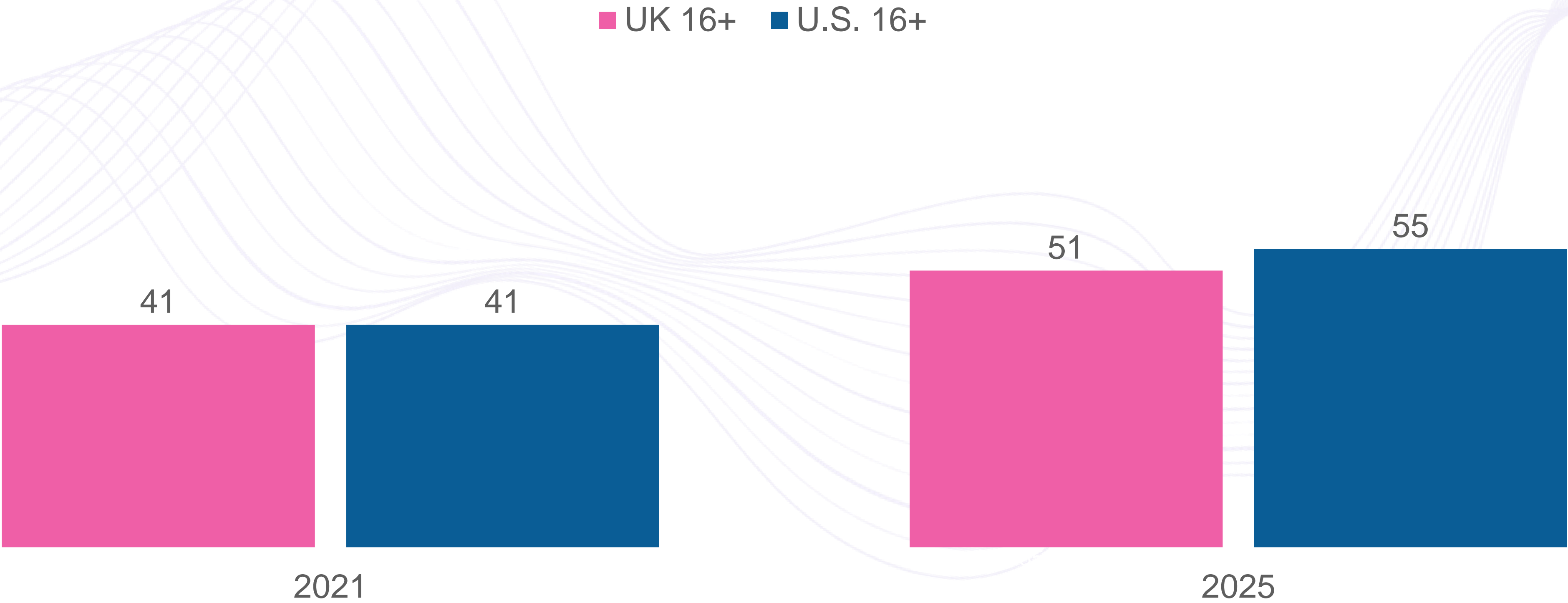


2025: Listened to and/or watched podcasts

Monthly Podcast Consumption

TOTAL POPULATIONS AGE 16+

% LISTENED TO OR WATCHED A PODCAST IN THE LAST MONTH

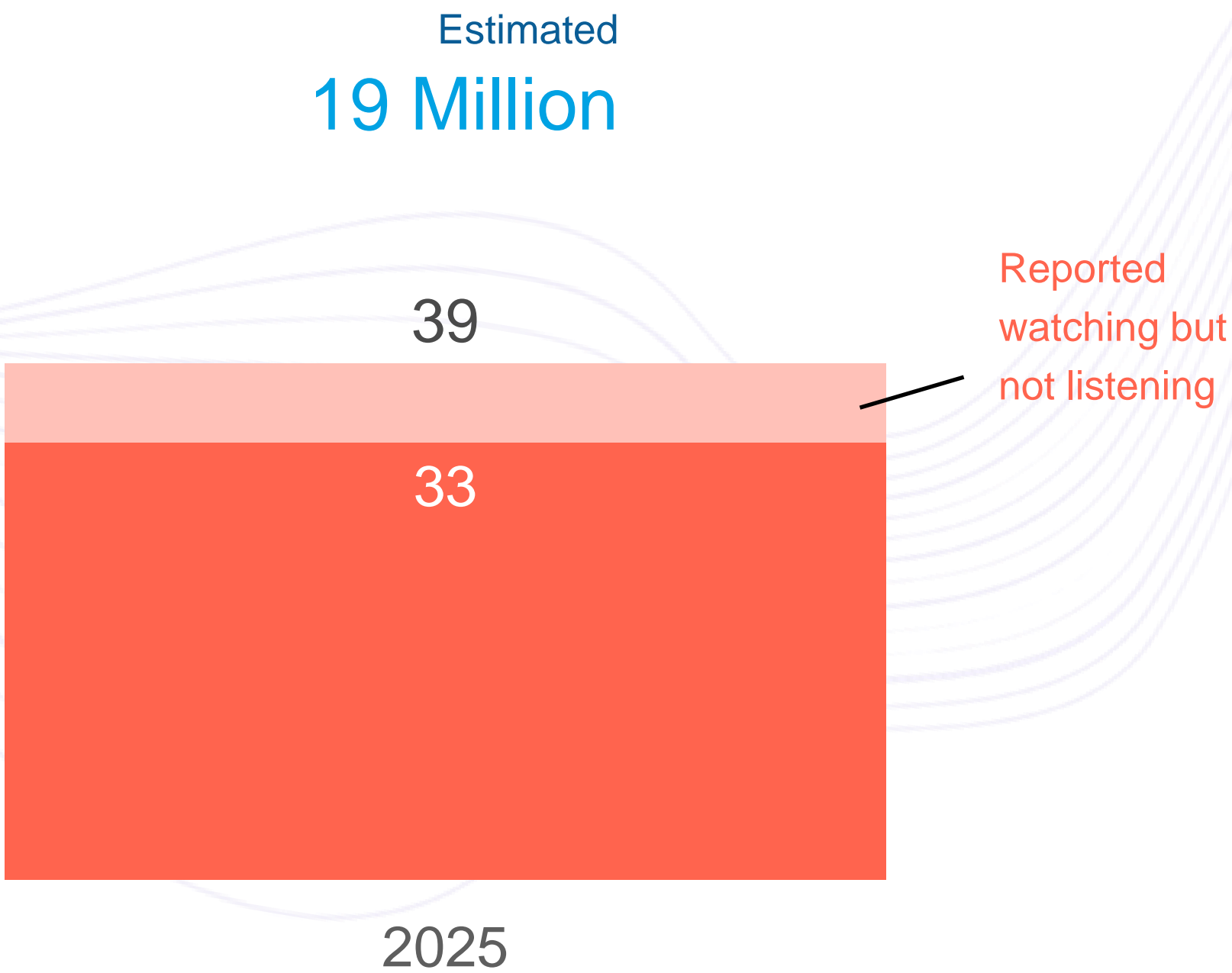
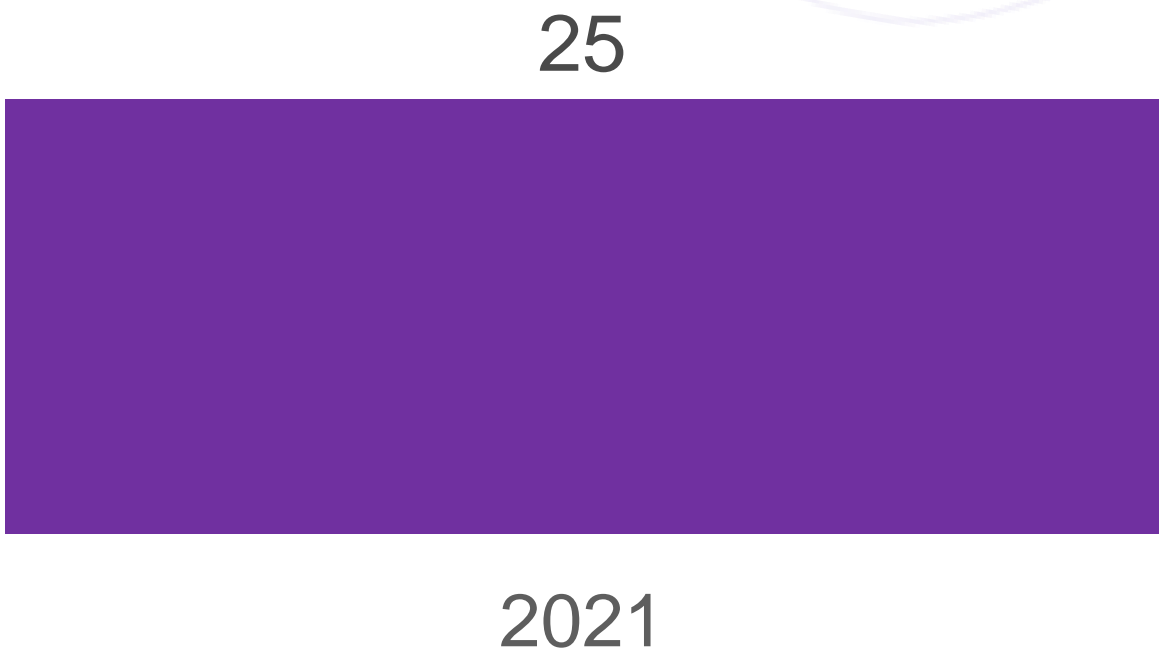


2025: Listened to and/or watched podcasts

Weekly Podcast Consumption

TOTAL UK POPULATION 16+

% LISTENED TO OR WATCHED A PODCAST IN LAST WEEK

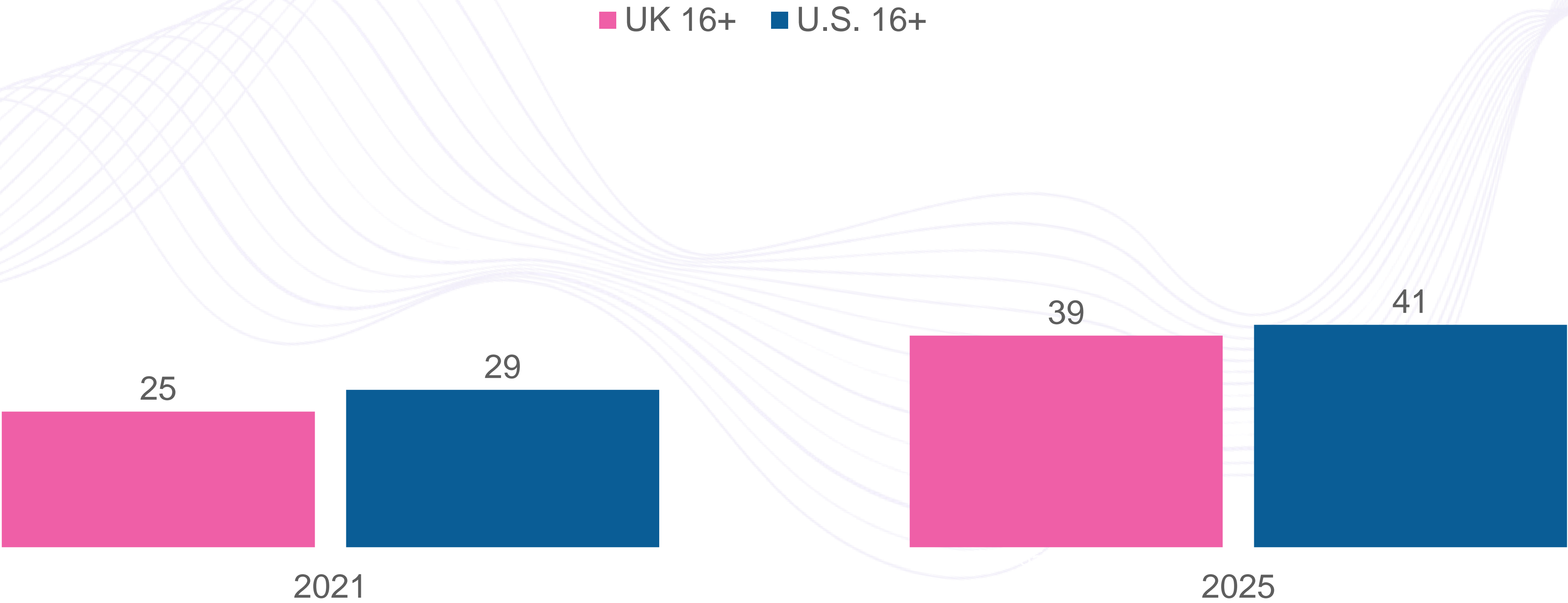


2025: Listened to and/or watched podcasts

Weekly Podcast Consumption

TOTAL POPULATIONS AGE 16+

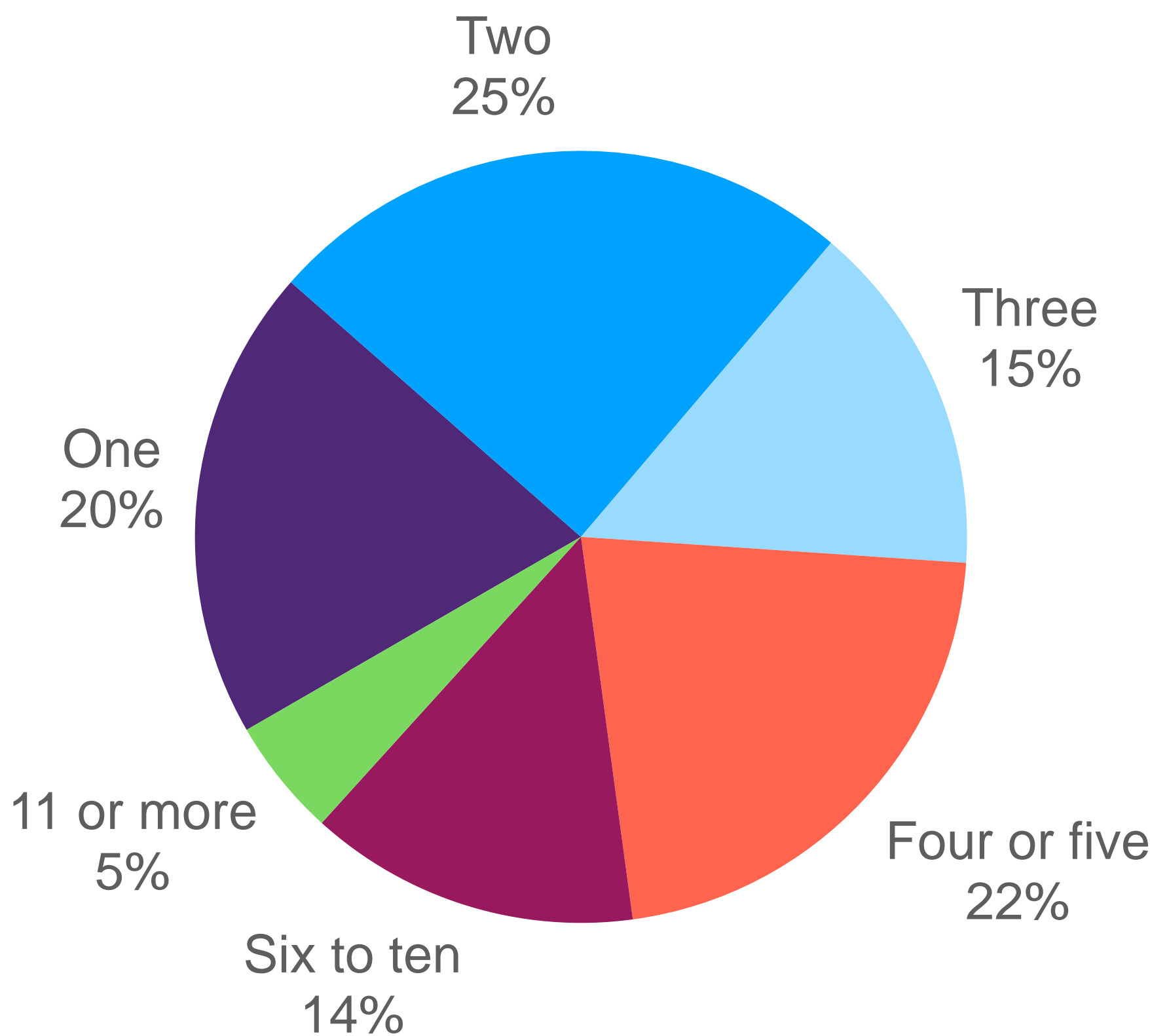
% LISTENED TO OR WATCHED A PODCAST IN THE LAST WEEK



2025: Listened to and/or watched podcasts

Number of Podcast Episodes Listened to in Last Week

BASE: UK 16+ WEEKLY PODCAST LISTENERS; 33%



UK weekly podcast listeners average
four podcast episodes
in the last week

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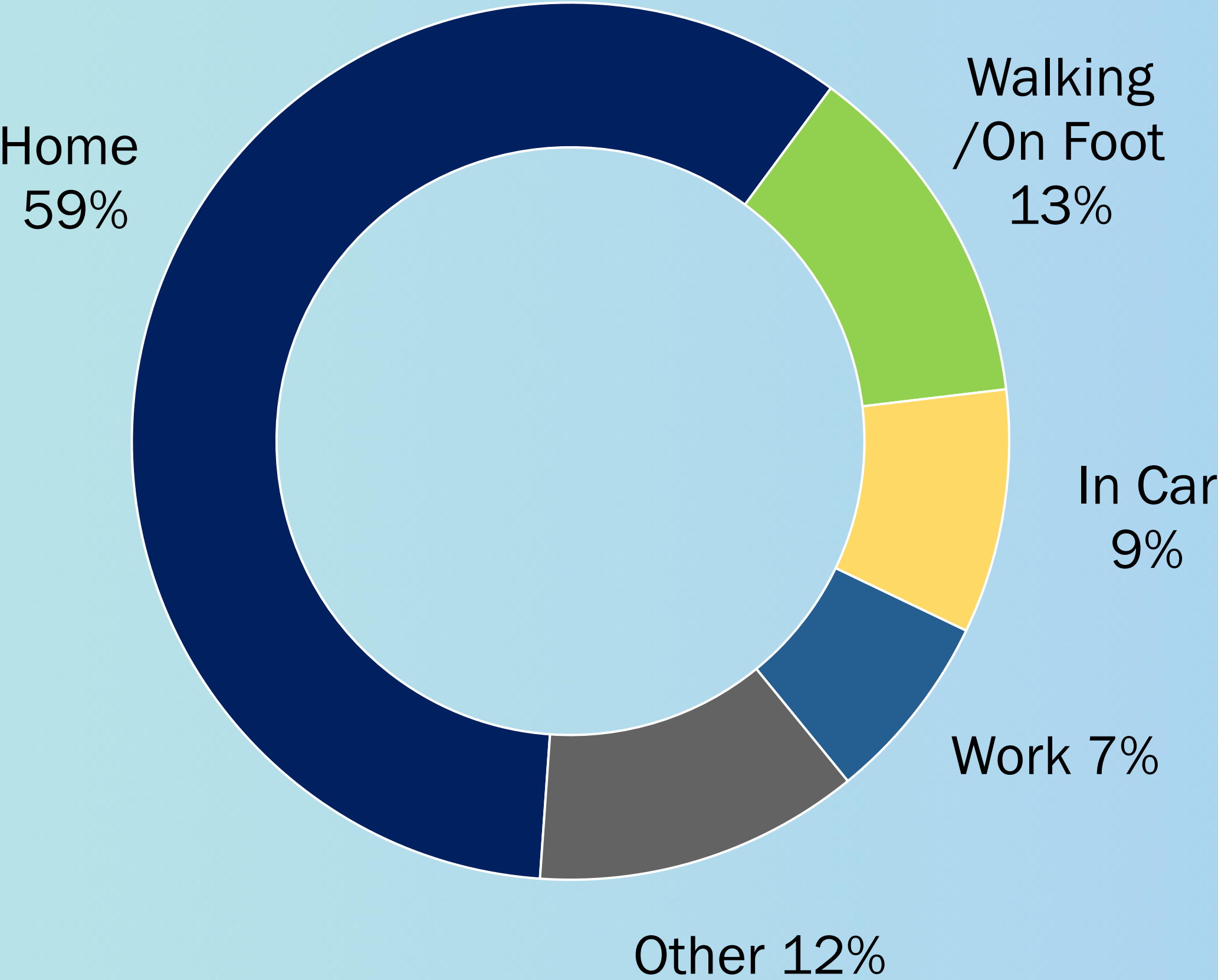
In-Car Media



Where do you listen to podcasts most often?

UK Weekly Podcast Listeners Age 15+

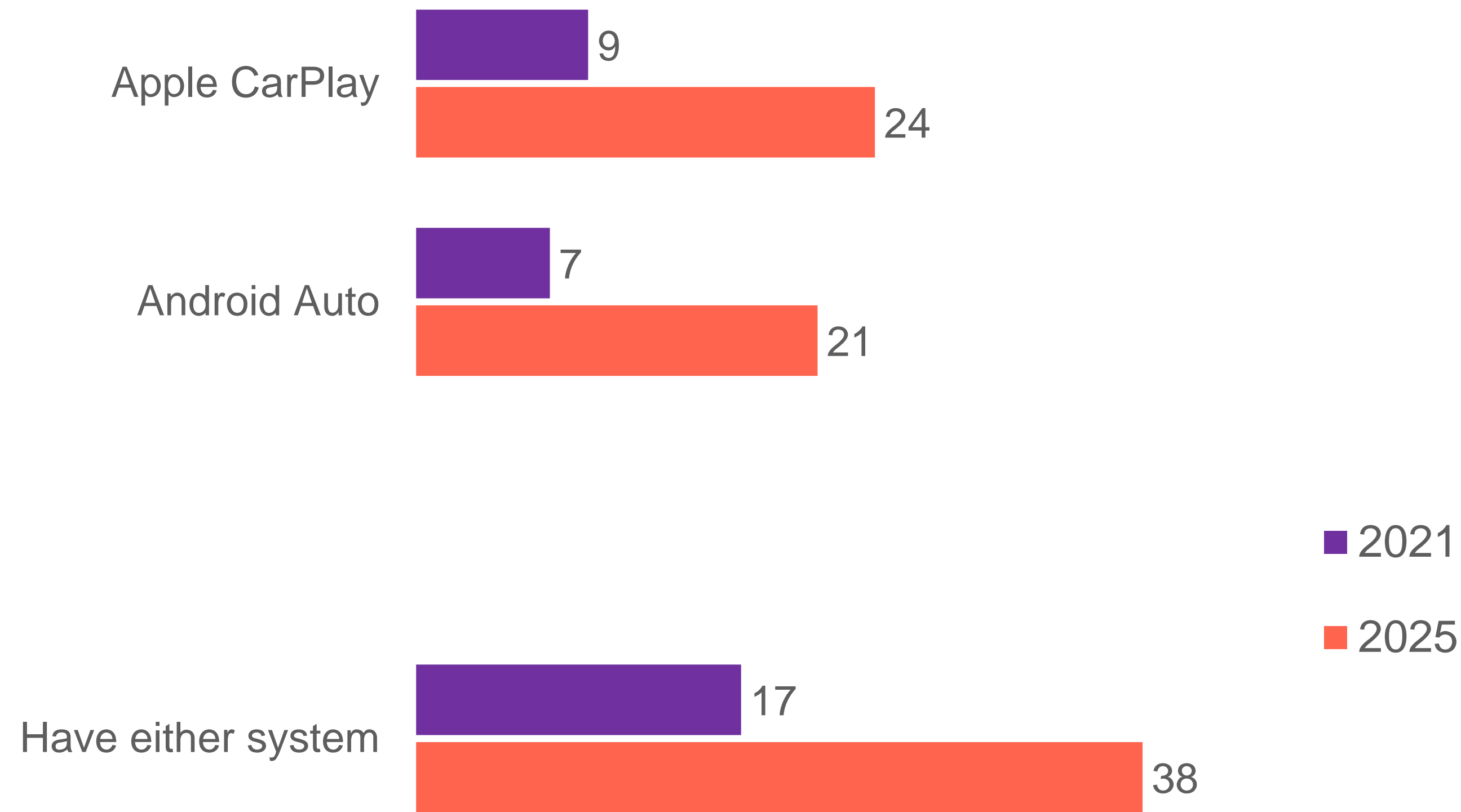
Q4 2024



Have Automotive Phone Integration Systems in Primary Vehicle

BASE: UK 18+ WHO HAS DRIVEN/RIDDEN IN CAR LAST MONTH; 91%

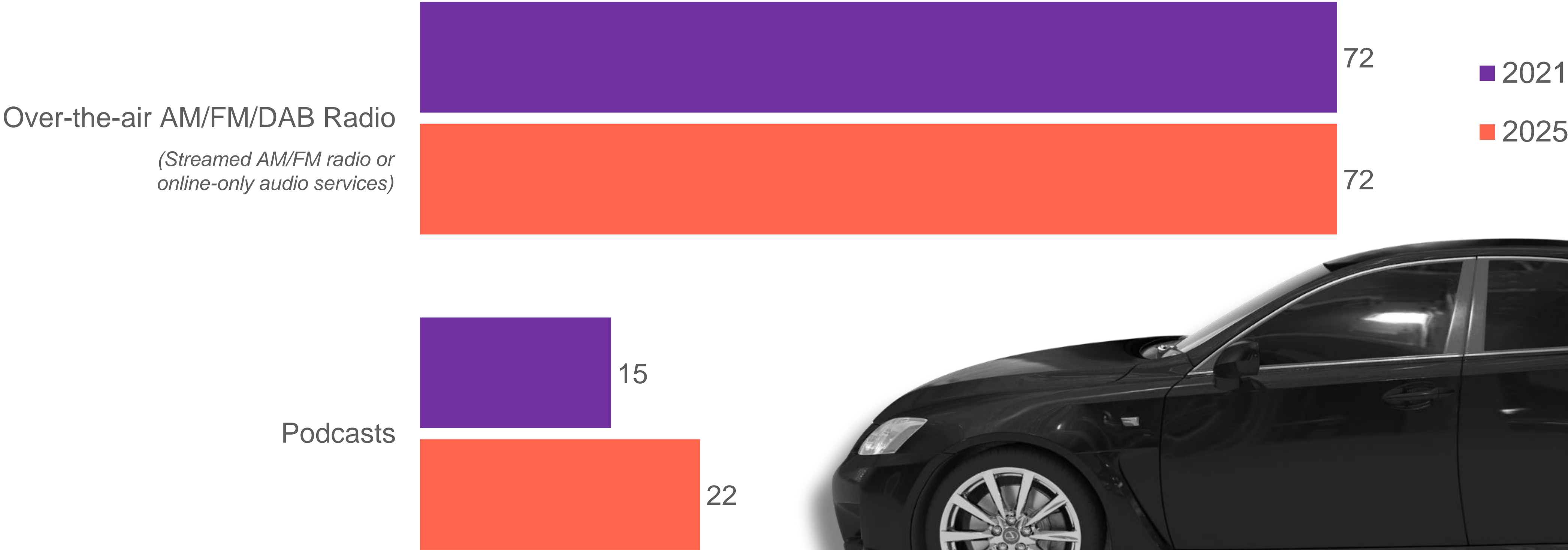
% HAVE SYSTEM IN PRIMARY VEHICLE



Audio Sources Currently Used in Car (Radio vs Podcasts)

BASE: UK 18+ WHO HAS DRIVEN/RIDDEN IN CAR LAST MONTH

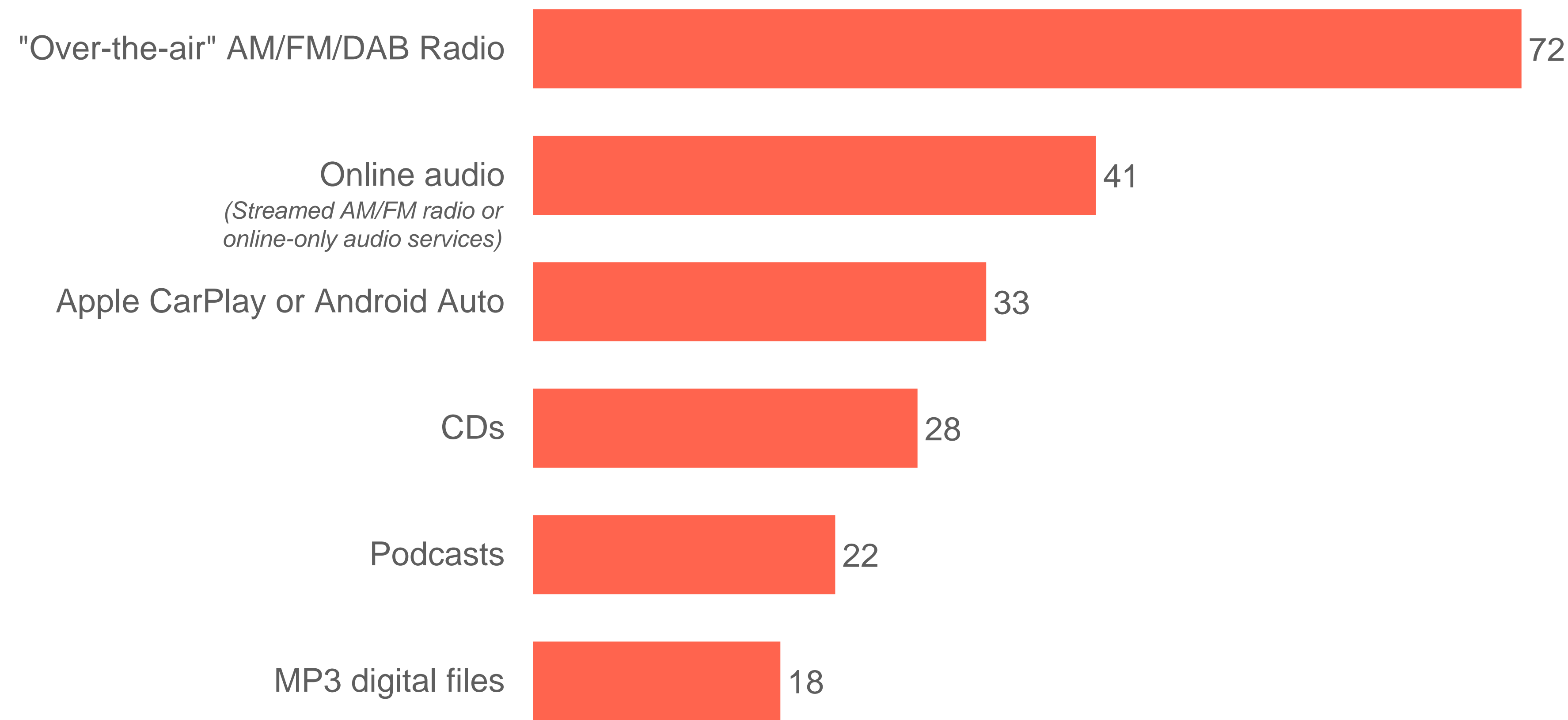
% USING AUDIO SOURCE IN CAR



Audio Sources Currently Used in Car

BASE: UK 18+ WHO HAS DRIVEN/RIDDEN IN CAR LAST MONTH; 91%

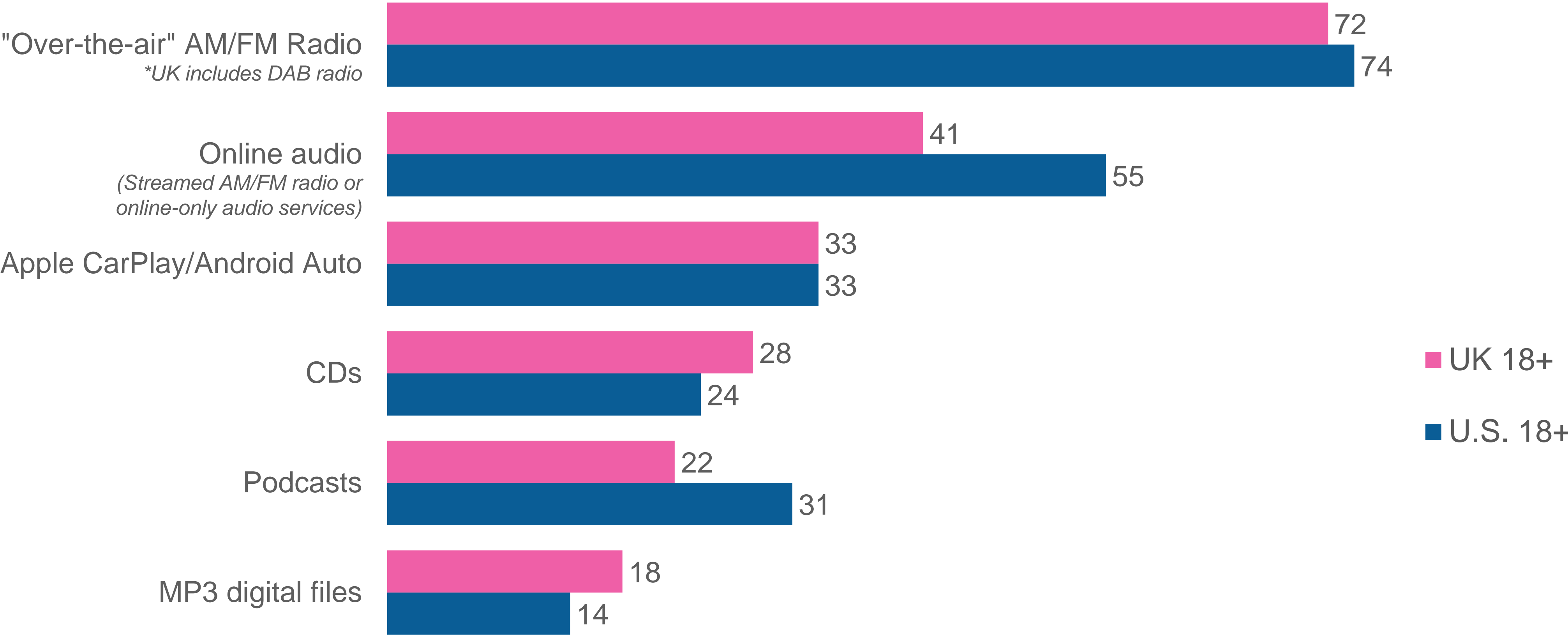
% USING AUDIO SOURCE IN CAR



Audio Sources Currently Used in Car

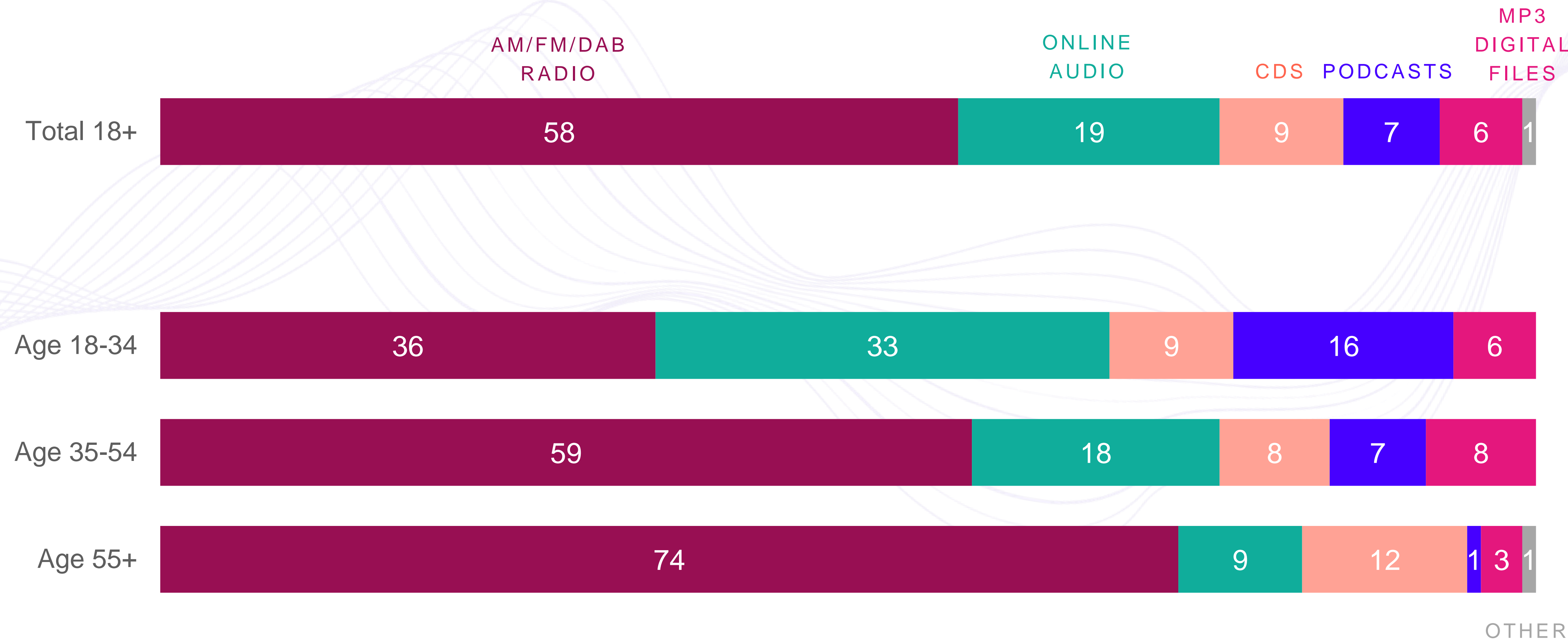
POPULATIONS 18+ WHO HAVE DRIVEN/RIDDEN IN CAR IN LAST MONTH

% USING AUDIO SOURCE IN CAR



Audio Source Used Most Often in Primary Vehicle

BASE: UK 18+ WHO HAS DRIVEN/RIDDEN IN CAR LAST MONTH



Observations

- → Tech adoption, all but that of physical radios increased since 2021
- → Social media usage shifted to Instagram and TikTok in the last four years
- → More people than ever in the UK are consuming online audio

Observations

- → Podcast listenership reaches record highs
- → The number of Brits with access to automotive integration systems has more than doubled
- → Podcast consumption in the car has made significant gains



THE INFINITE DIAL[®] UK 2025

