

 THE INFINITE DIAL® 2020

# The Infinite Dial 2020

#InfiniteDial



#InfiniteDial

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# 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

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# Media & Technology



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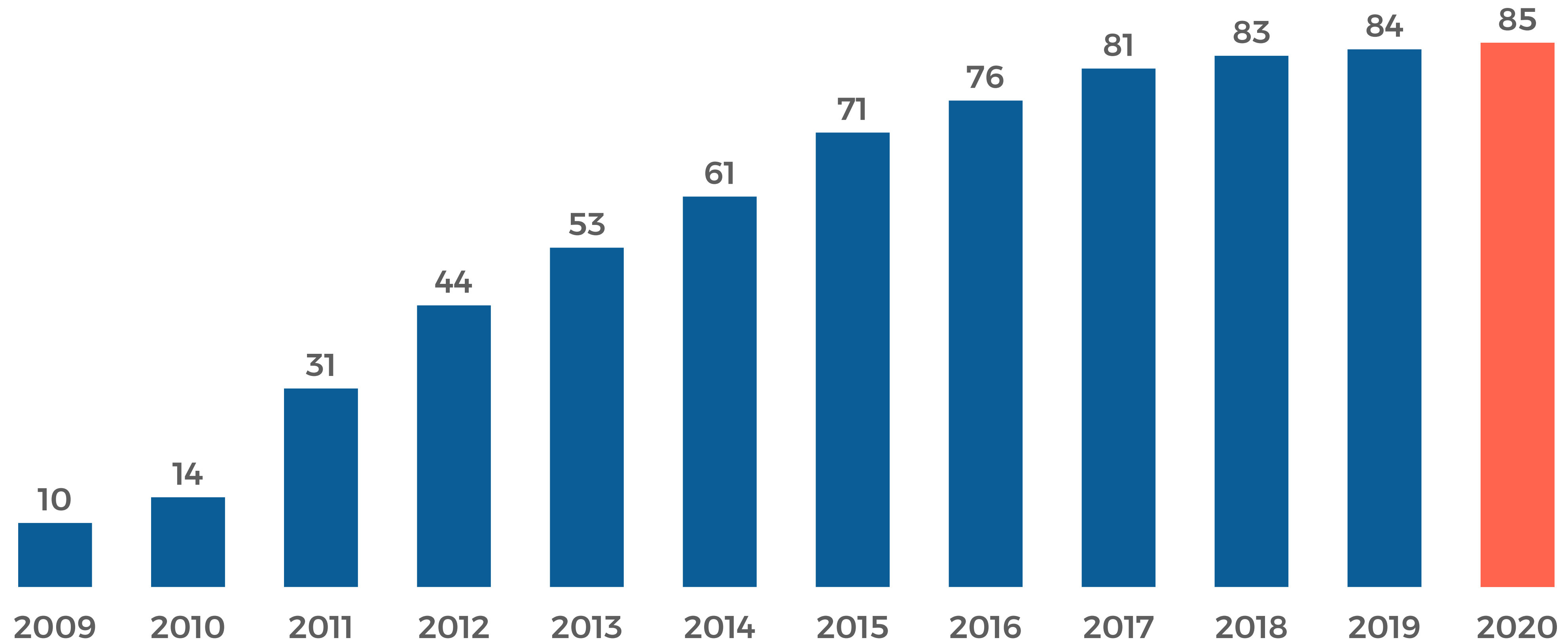
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# Smartphone Ownership

TOTAL U.S. POPULATION 12+

% OWNING A SMARTPHONE

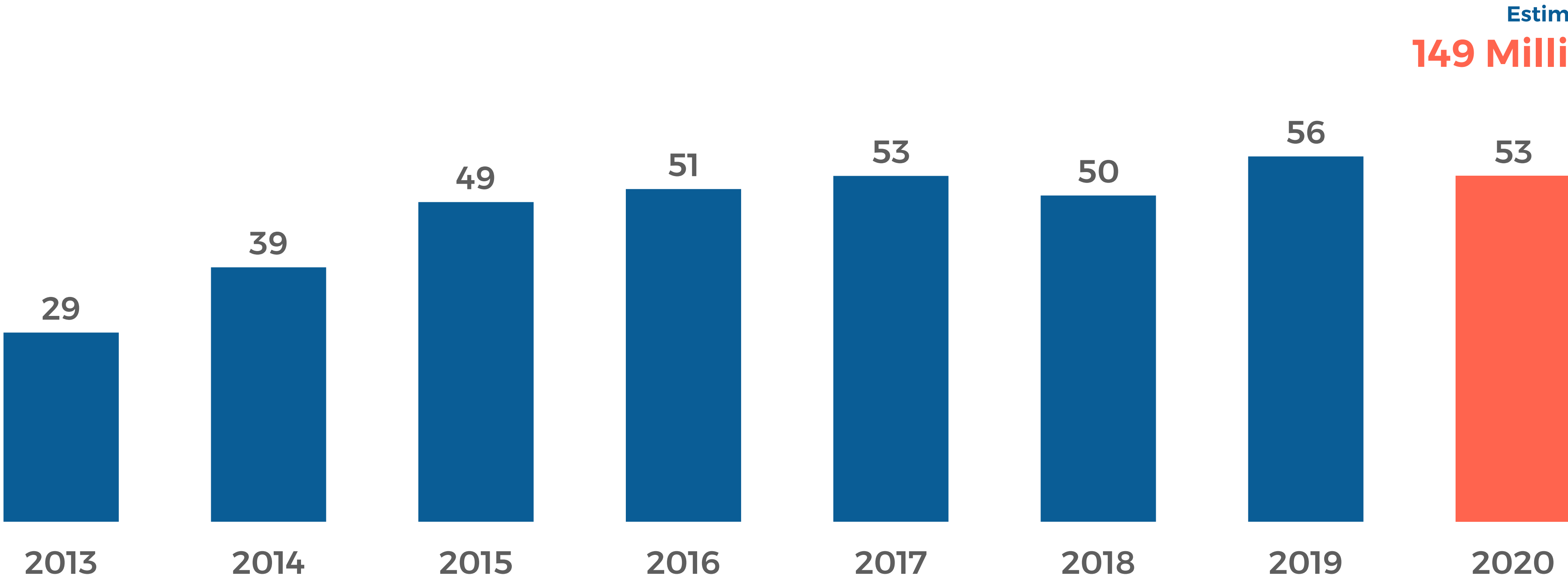
Estimated  
**240 Million**



# Tablet Ownership

TOTAL U.S. POPULATION 12+

% OWNING A TABLET

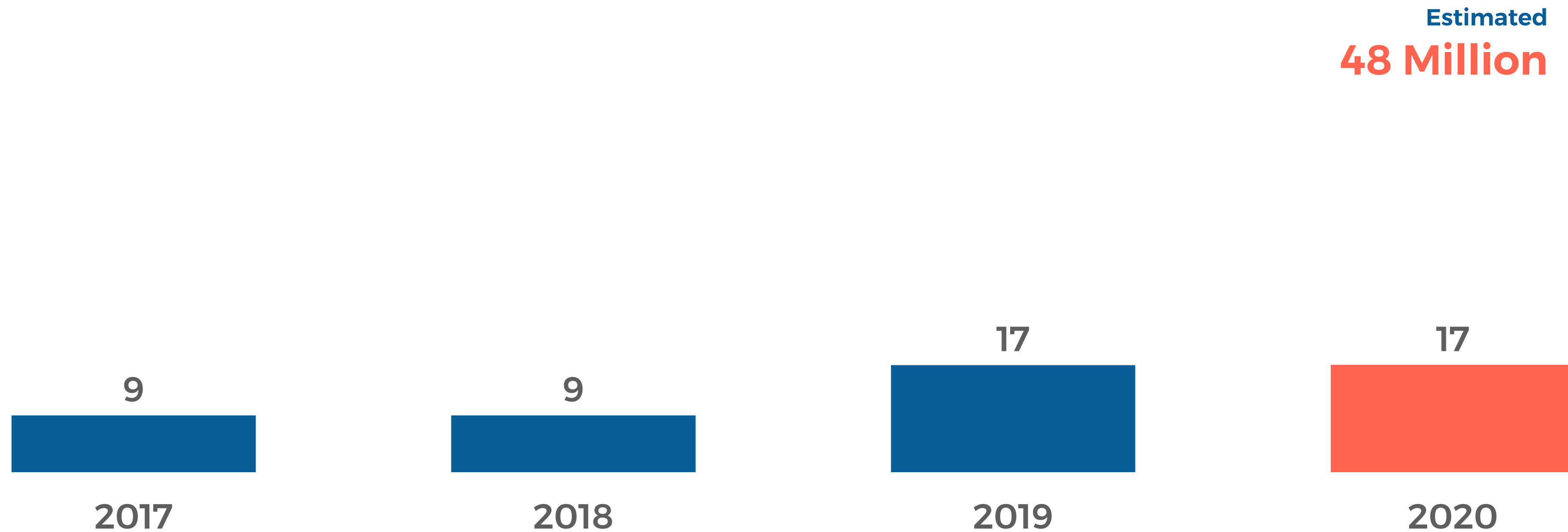


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# Smartwatch Ownership

TOTAL U.S. POPULATION 12+

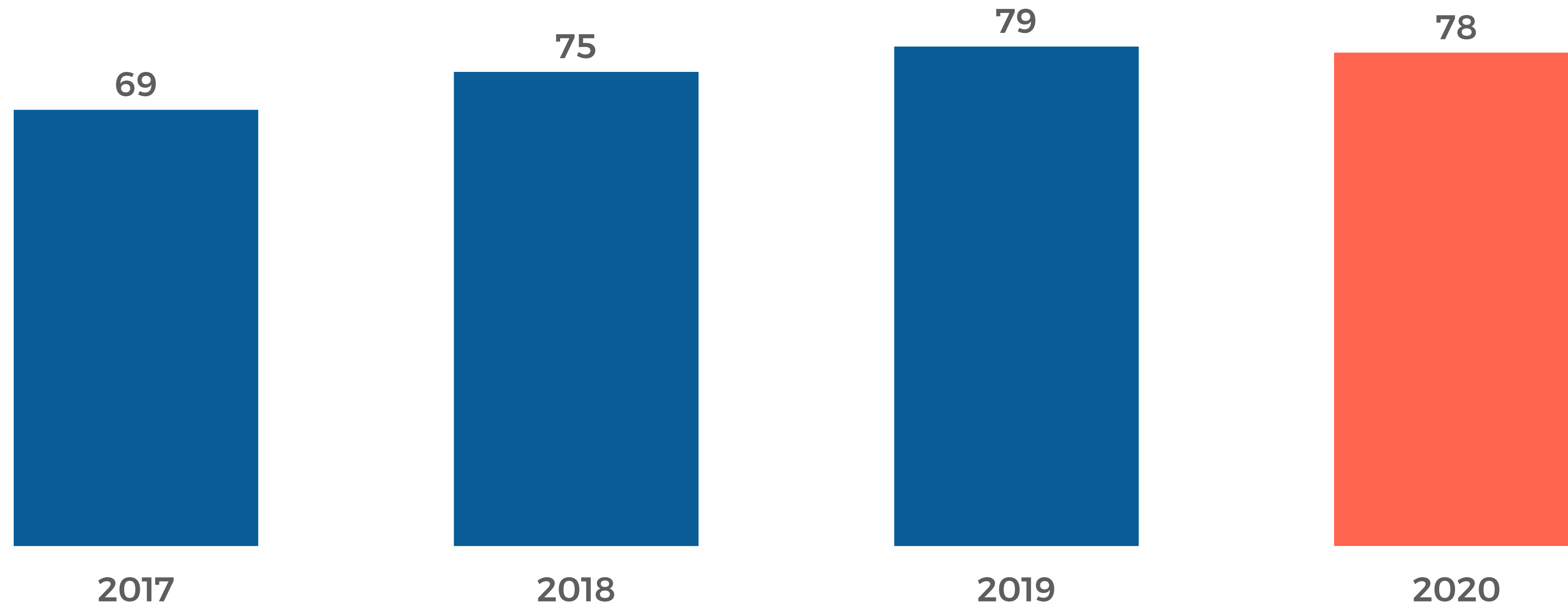
% OWNING A SMARTWATCH



# Smart Speaker Awareness

TOTAL U.S. POPULATION 12+

% AWARE OF ANY SMART SPEAKER BRAND

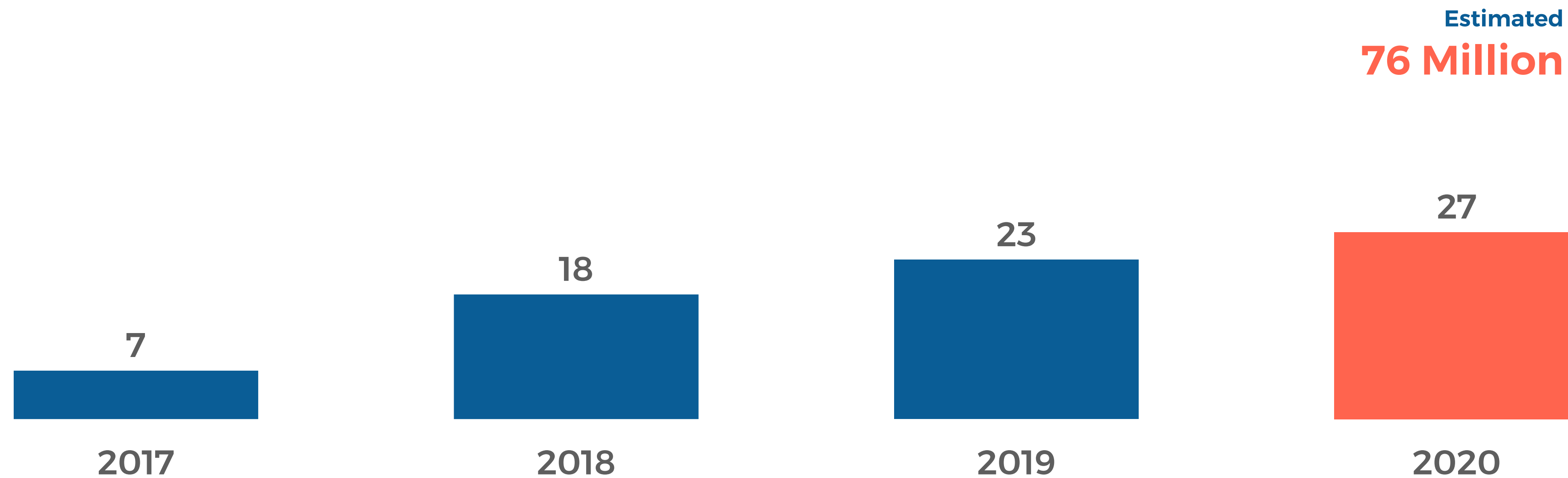




# Smart Speaker Ownership

TOTAL U.S. POPULATION 12+

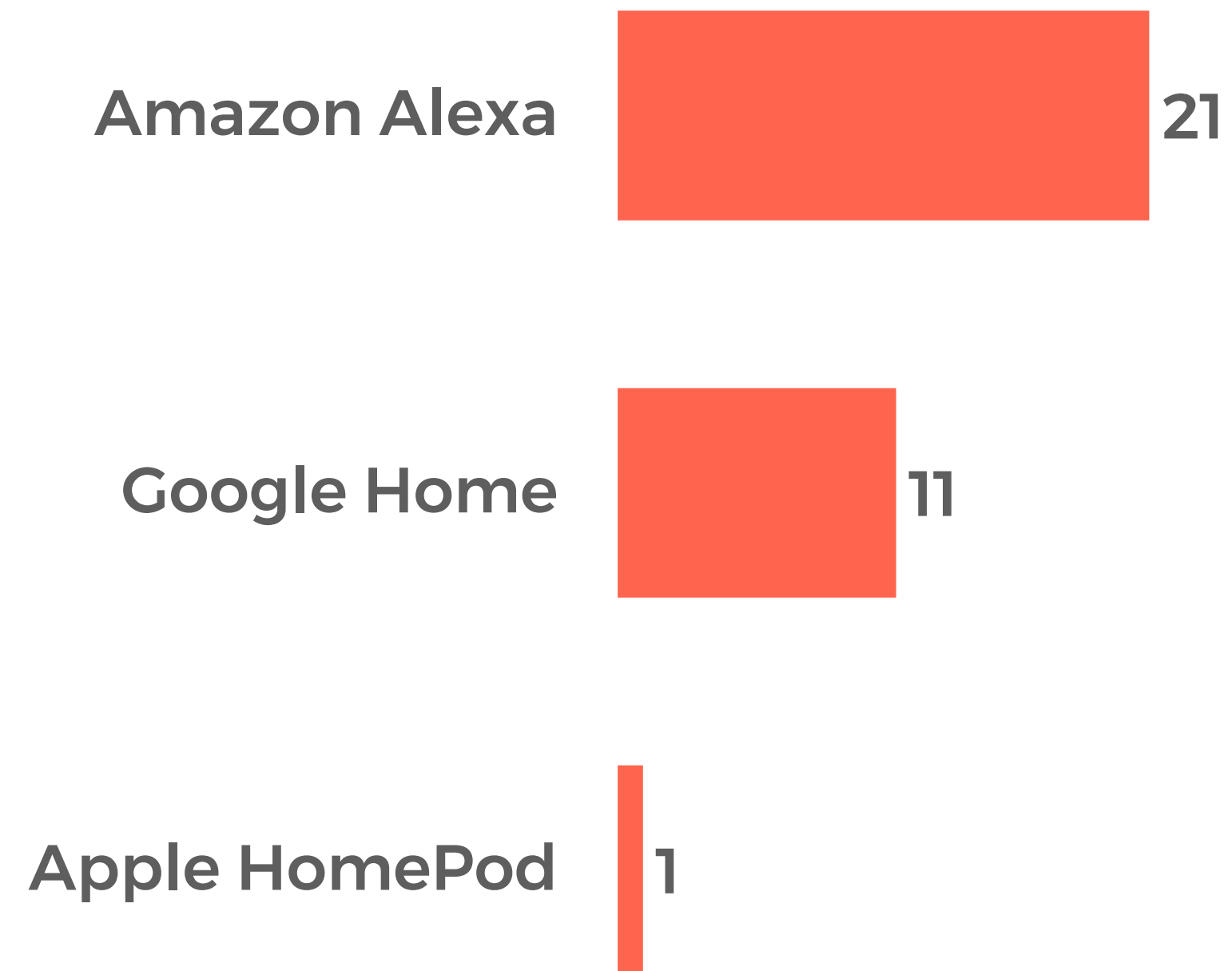
% OWNING A SMART SPEAKER



# Smart Speaker Ownership

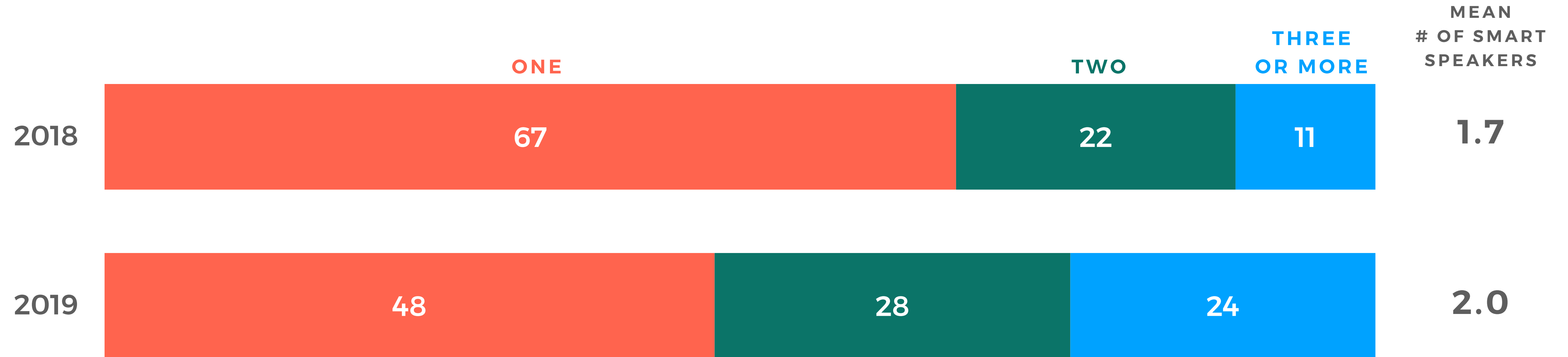
TOTAL U.S. POPULATION 12+

% OWNING SMART SPEAKER



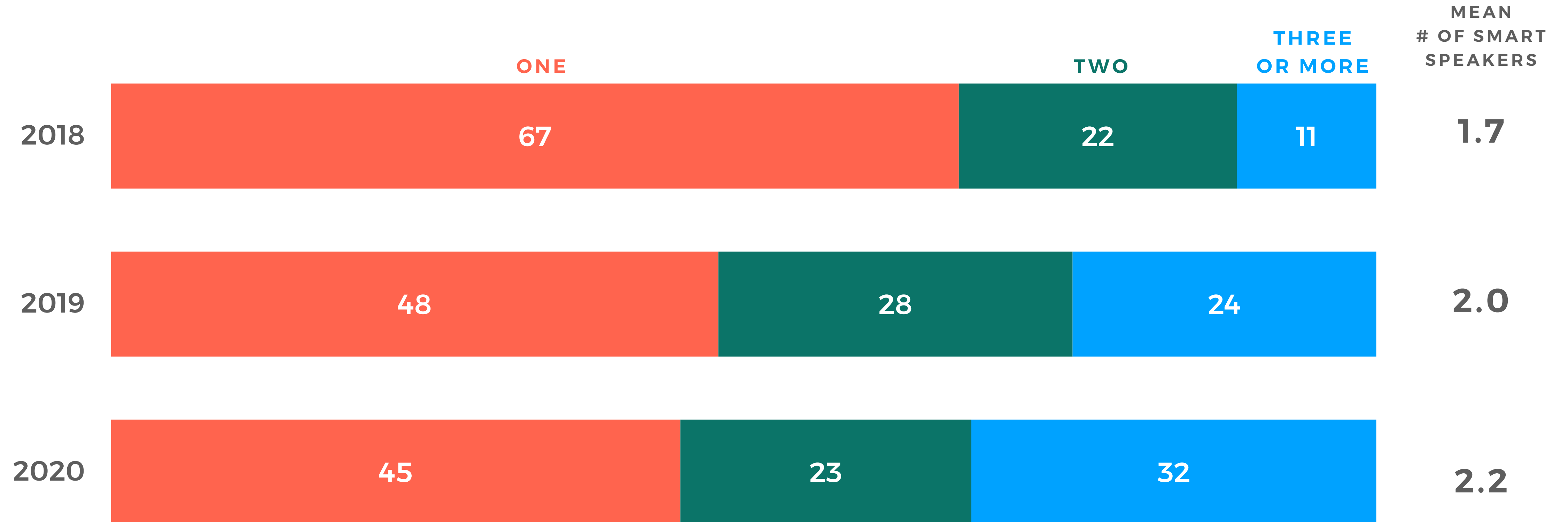
# Number of Smart Speakers in Household

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



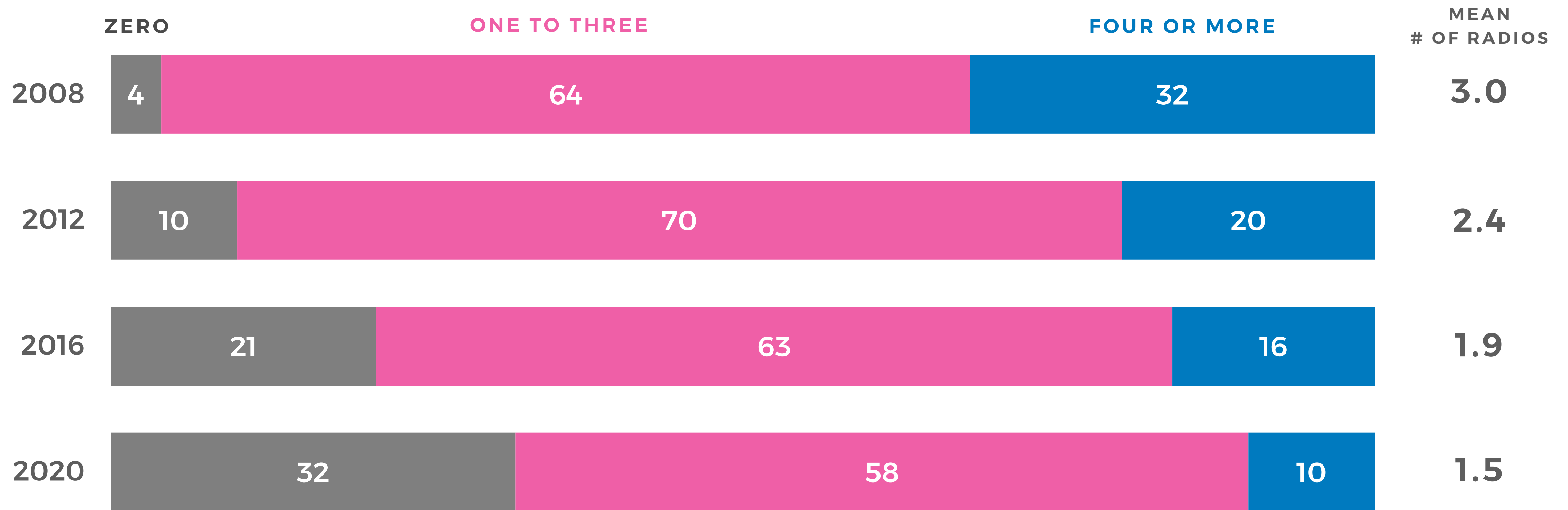
# Number of Smart Speakers in Household

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



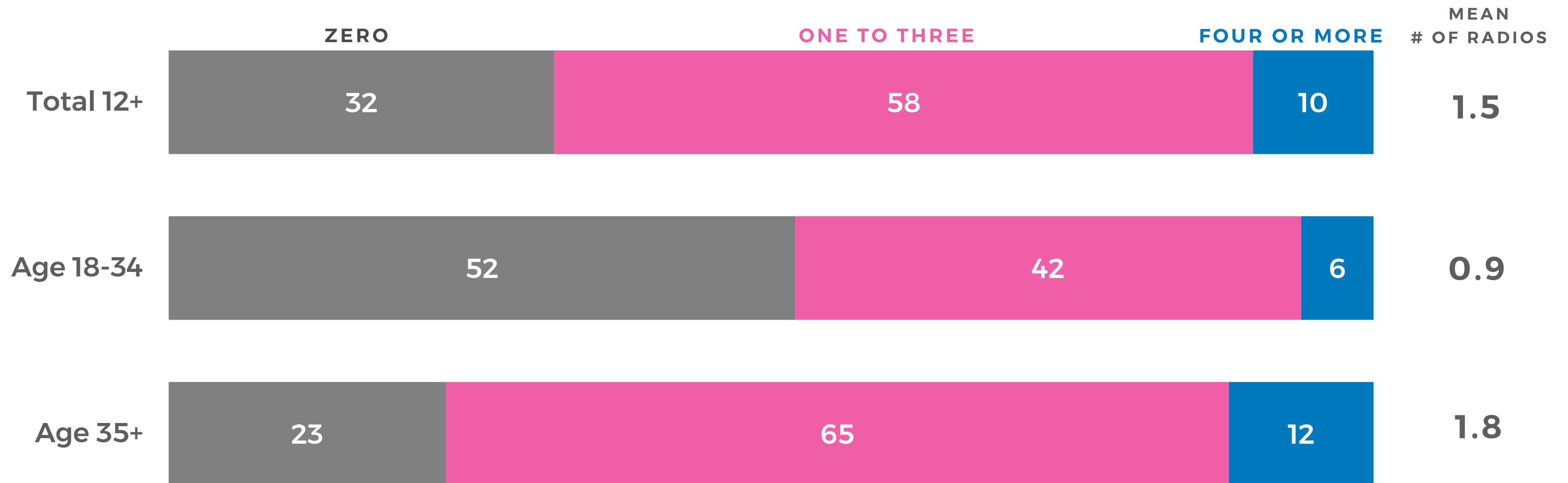
# Number of Radios in Household

TOTAL U.S. POPULATION 12+



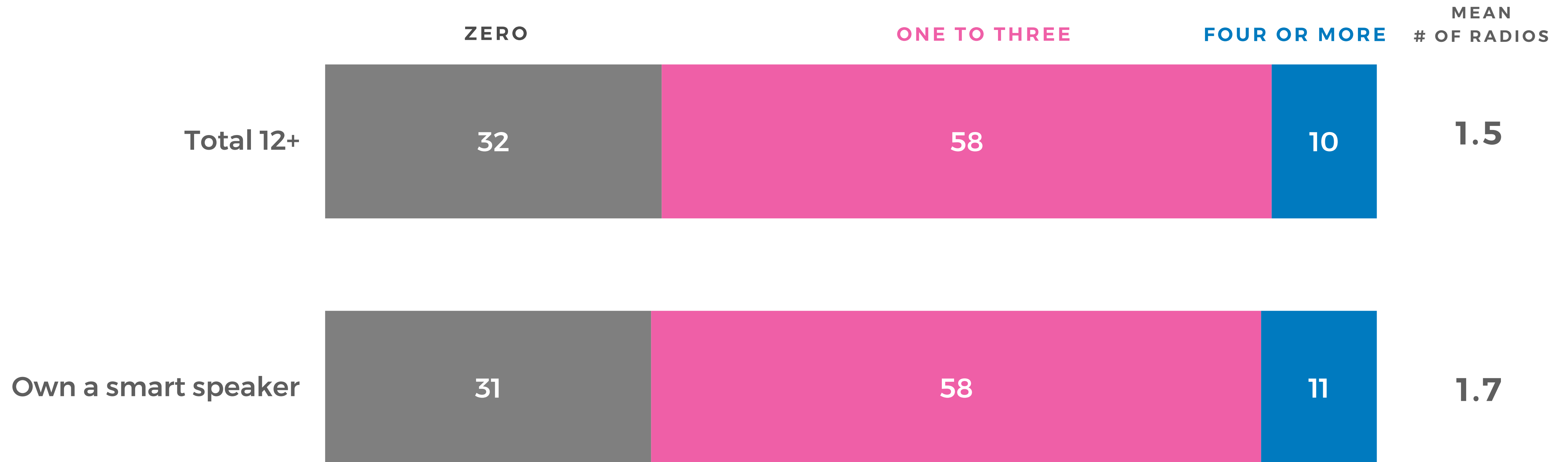
# Number of Radios in Household

TOTAL U.S. POPULATION



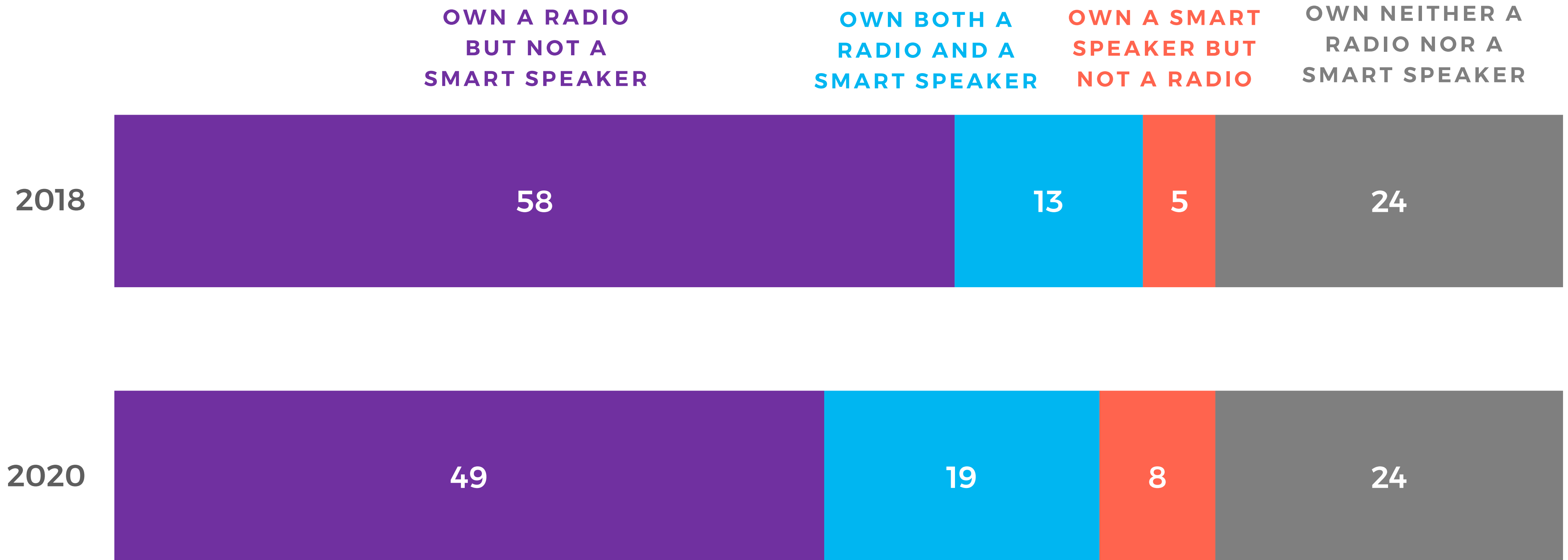
# Number of Radios in Household

TOTAL U.S. POPULATION



# Radio Ownership and Smart Speaker Ownership

TOTAL U.S. POPULATION

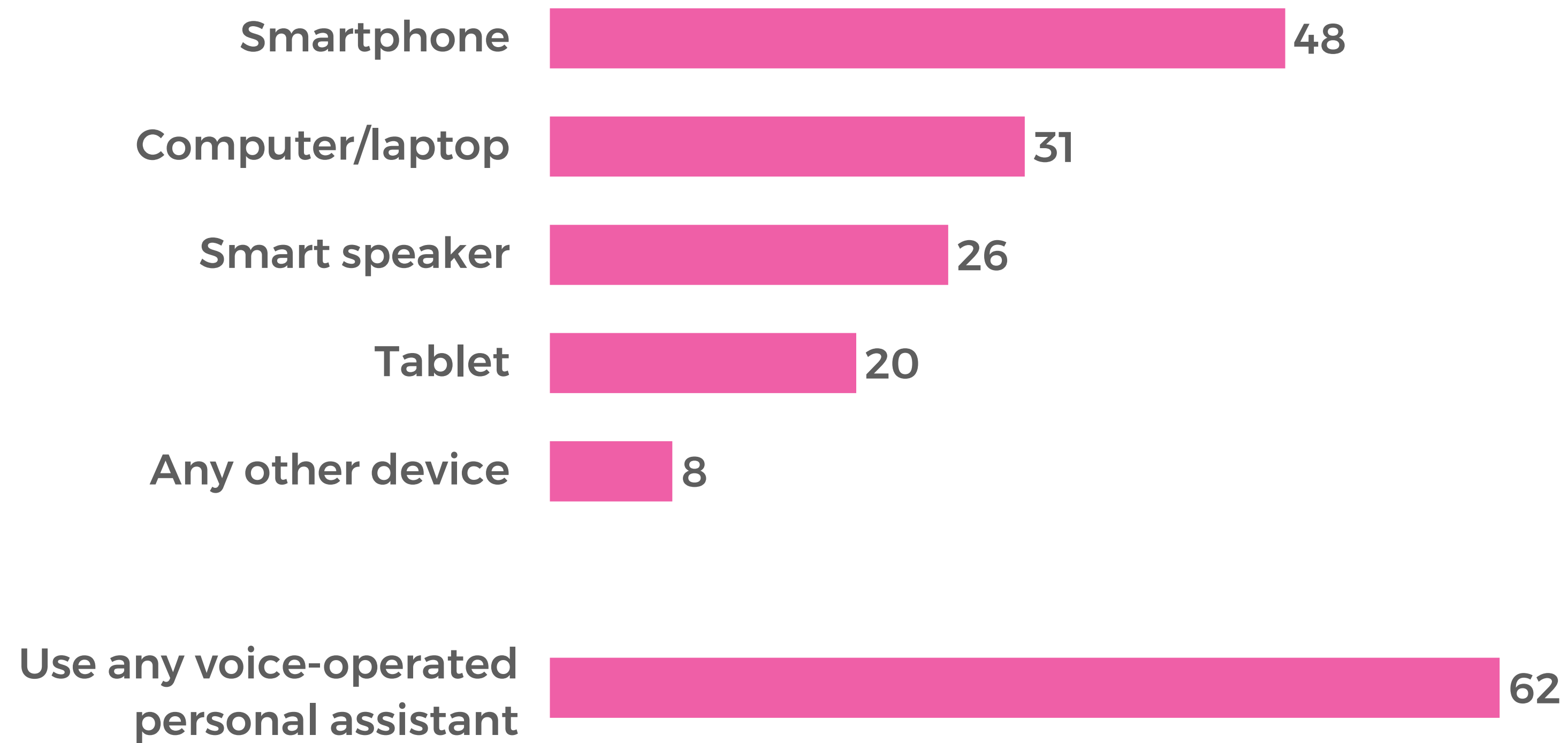




# Voice-Operated Personal Assistant Usage

TOTAL U.S. POPULATION 12+

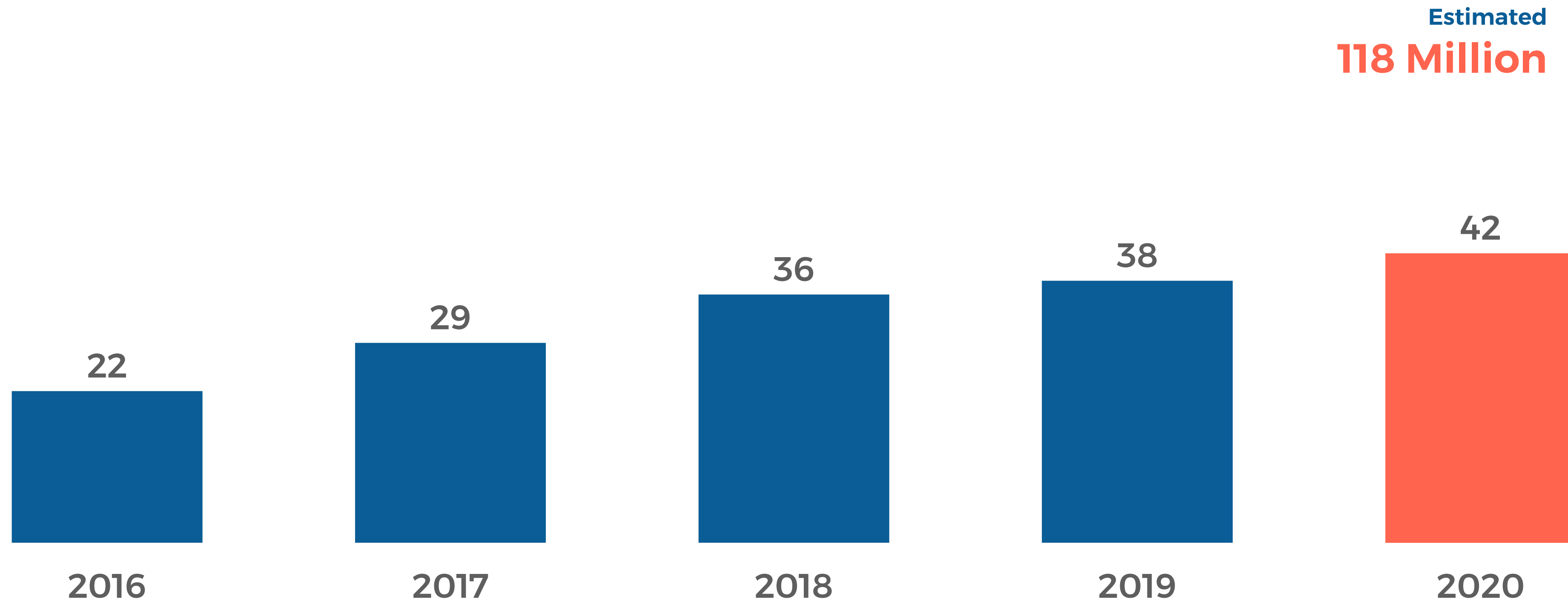
% USING VOICE-OPERATED PERSONAL ASSISTANTS ON DEVICE



# Amazon Prime Subscription

TOTAL U.S. POPULATION 12+

% SUBSCRIBE TO AMAZON PRIME



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# Social Media



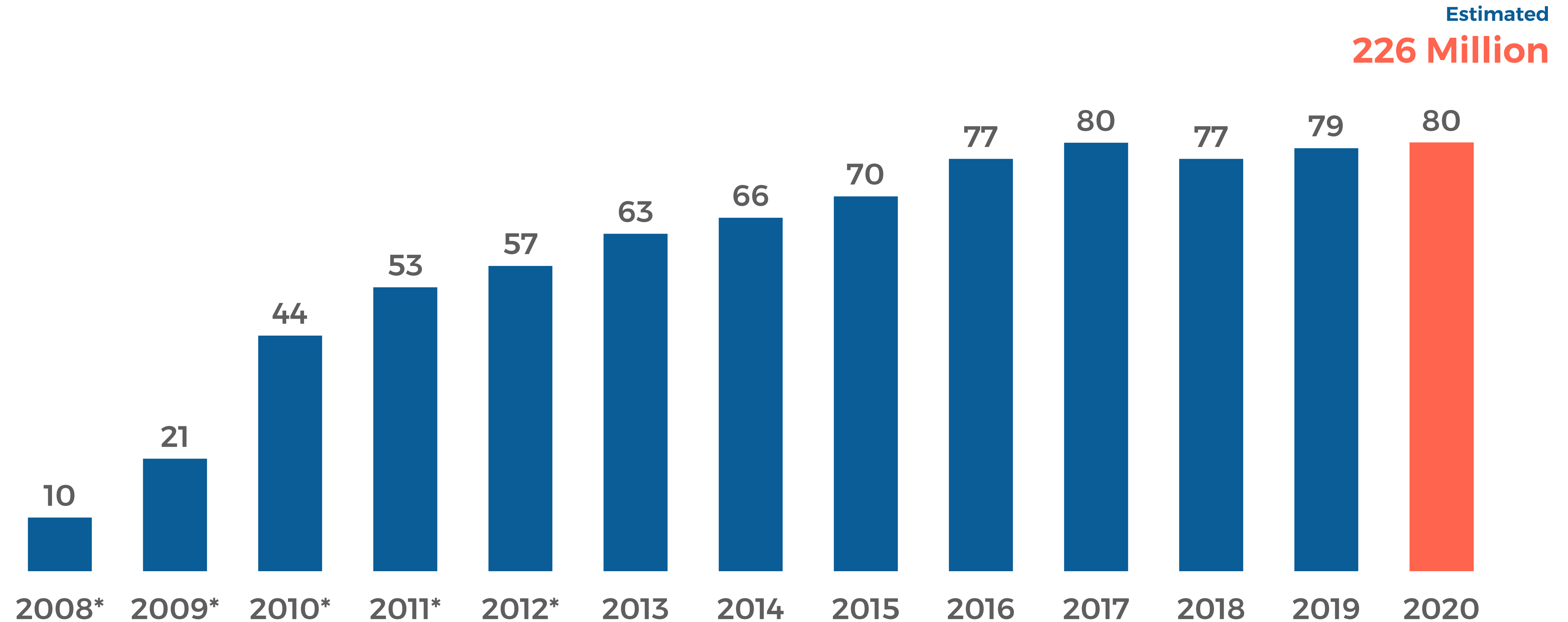
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# Social Media Usage

TOTAL U.S. POPULATION 12+

% USING SOCIAL MEDIA



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

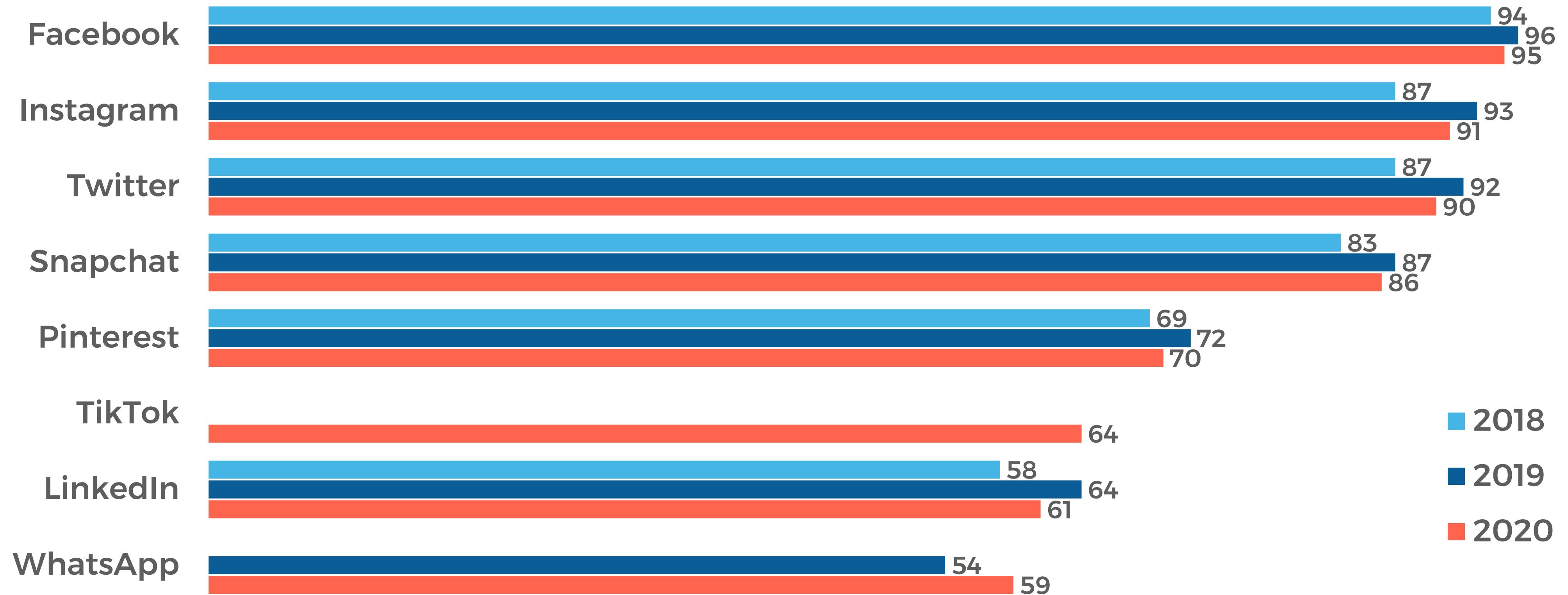


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# Social Media Brand Awareness

TOTAL U.S. POPULATION 12+

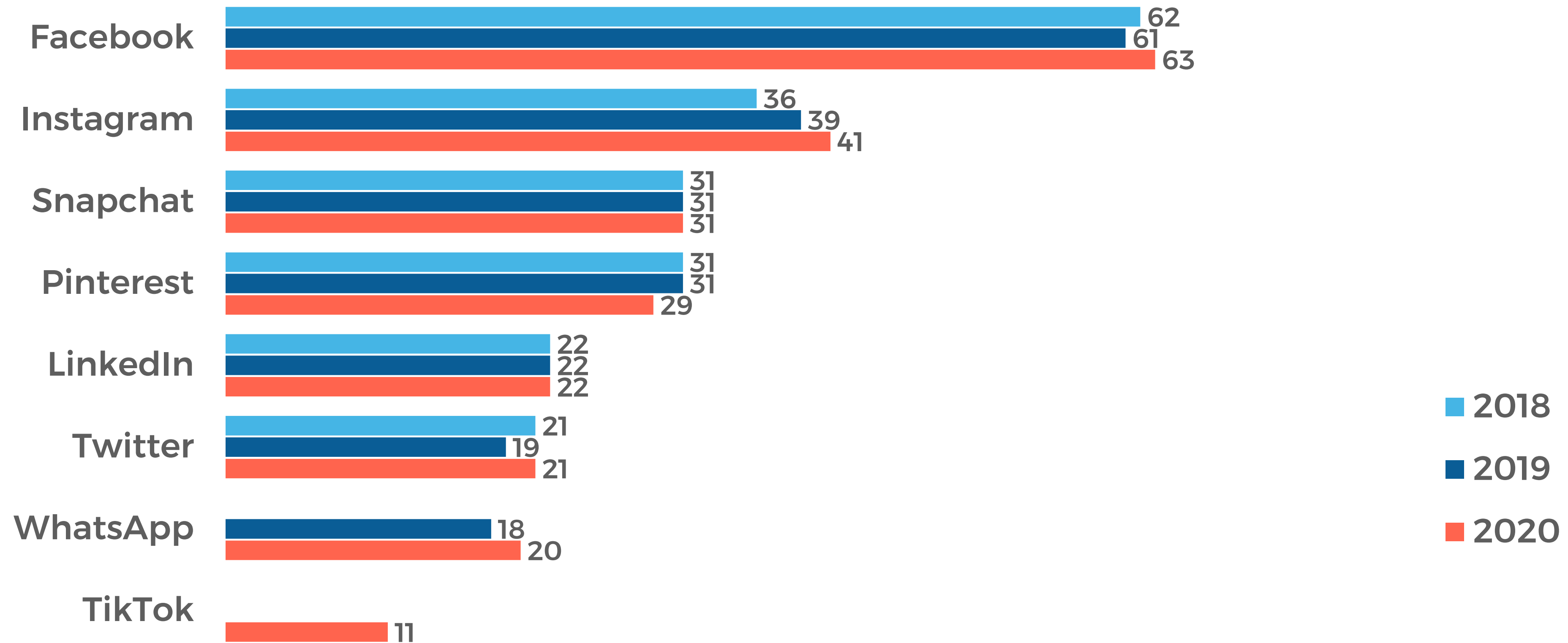
% AWARE OF SOCIAL MEDIA BRAND



# Social Media Brand Usage

TOTAL U.S. POPULATION 12+

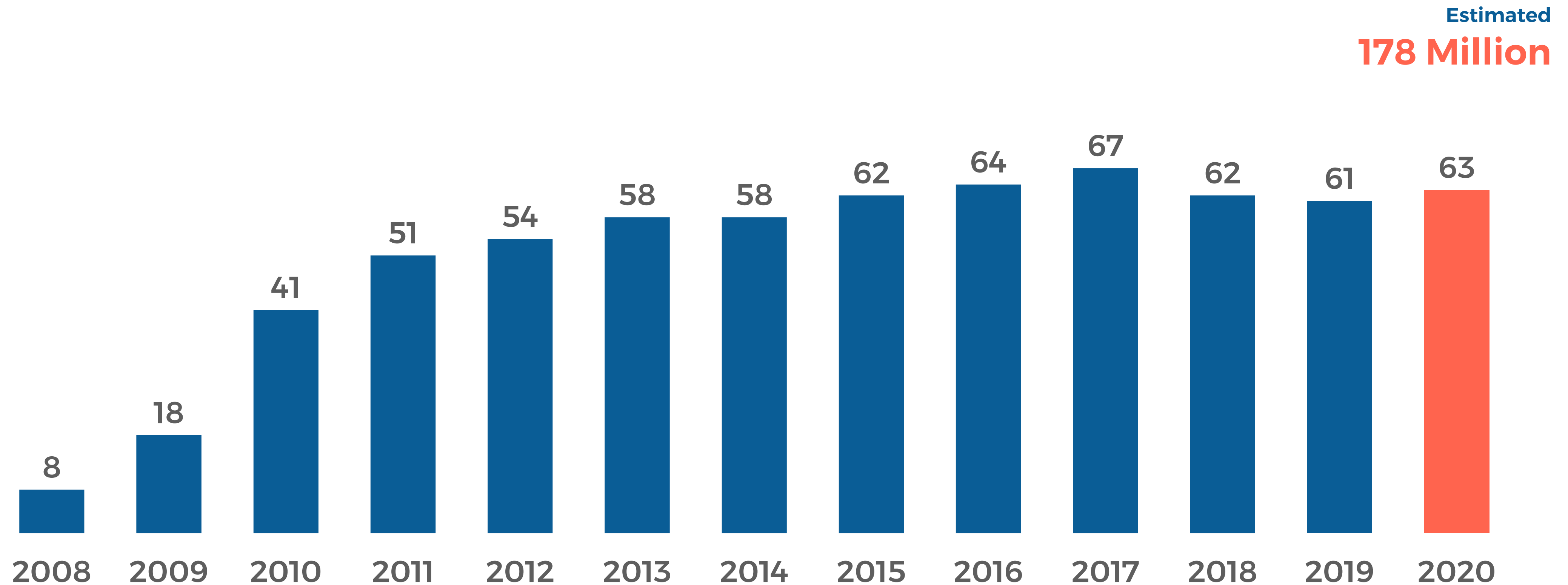
% USING SOCIAL MEDIA BRAND



# Facebook Usage

TOTAL U.S. POPULATION 12+

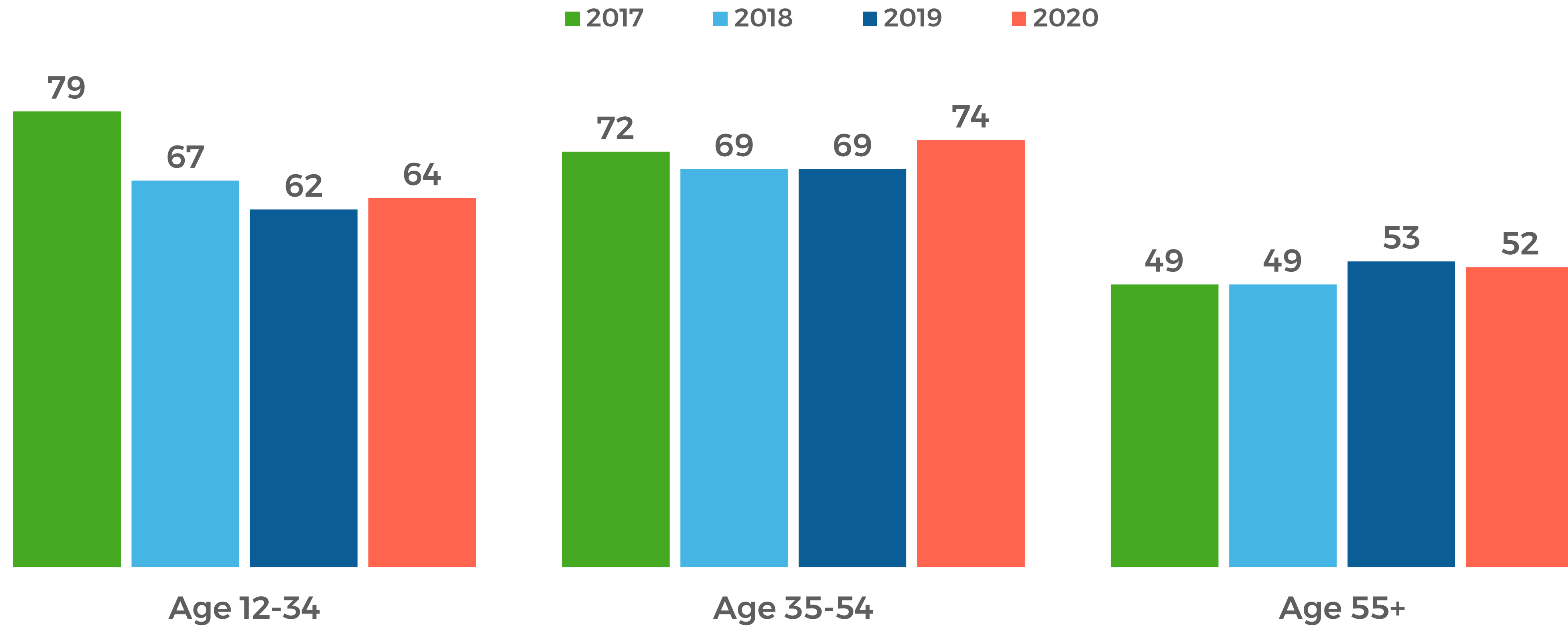
% USING FACEBOOK



# Facebook Usage

U.S. POPULATION

% USING FACEBOOK

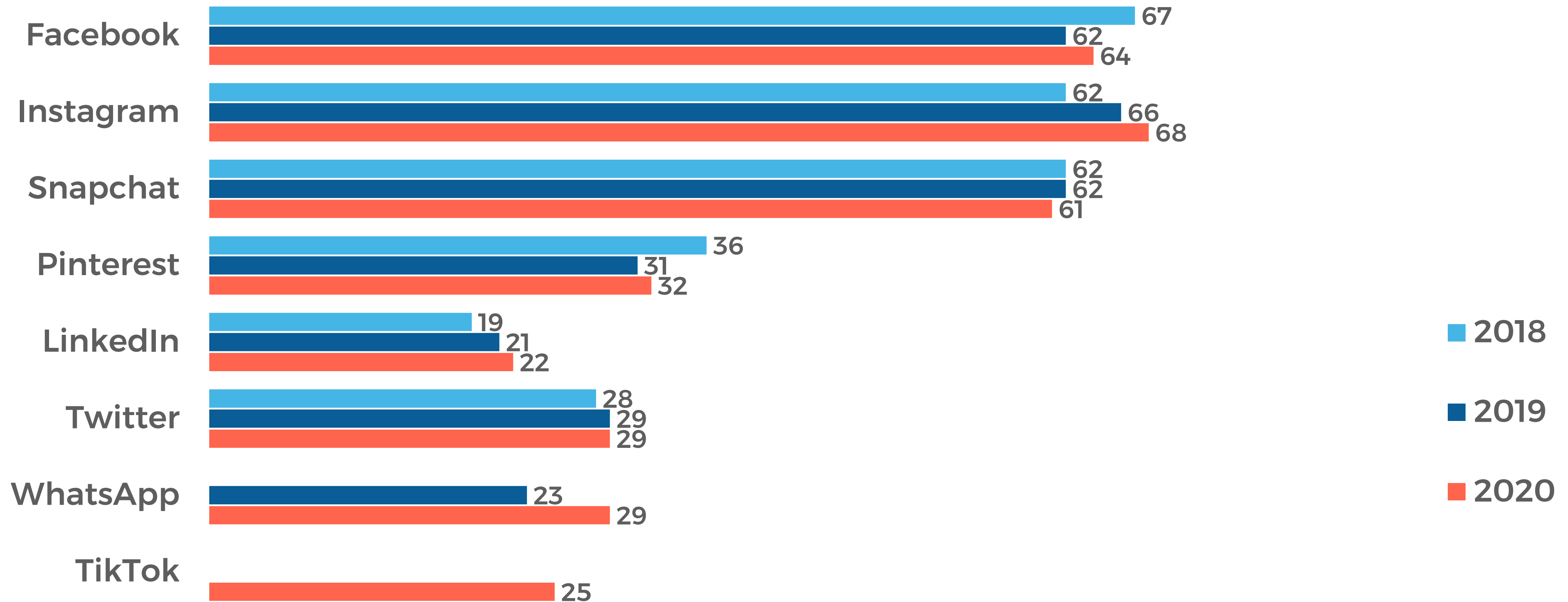




# Social Media Brand Usage (Age 12-34)

U.S. POPULATION

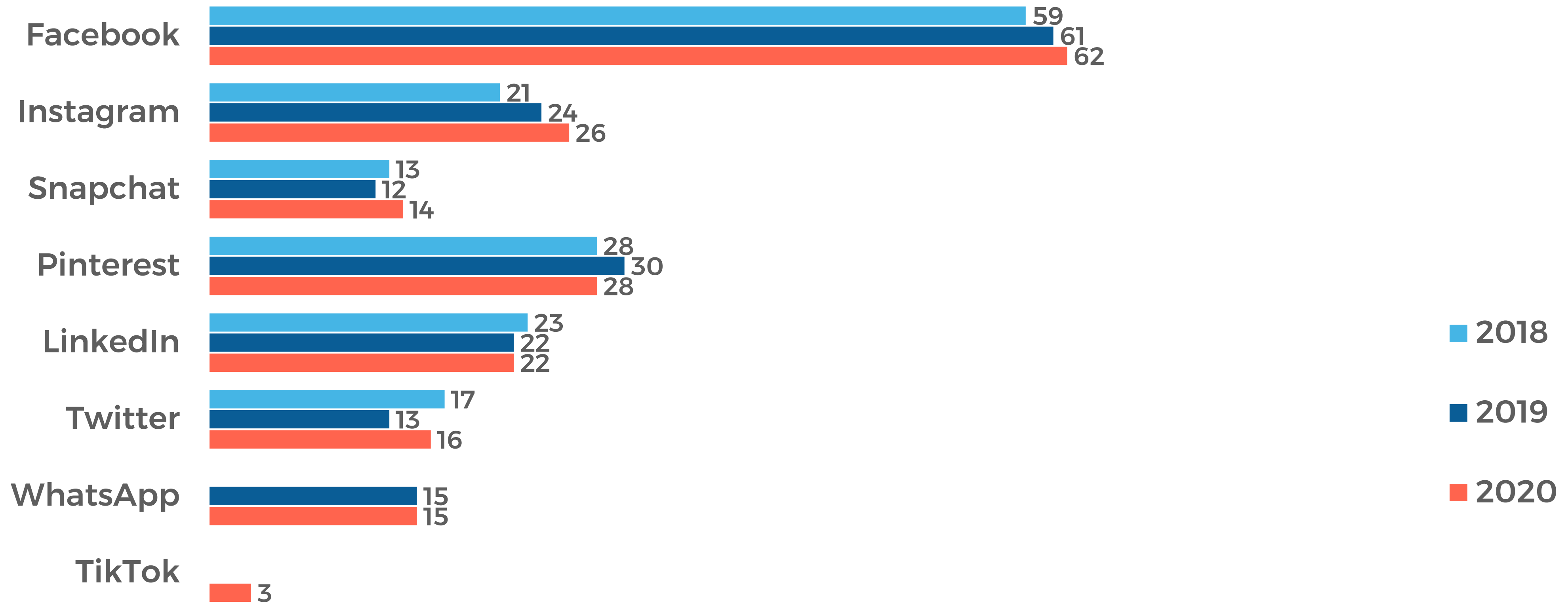
% USING SOCIAL MEDIA BRAND



# Social Media Brand Usage (Age 35 and older)

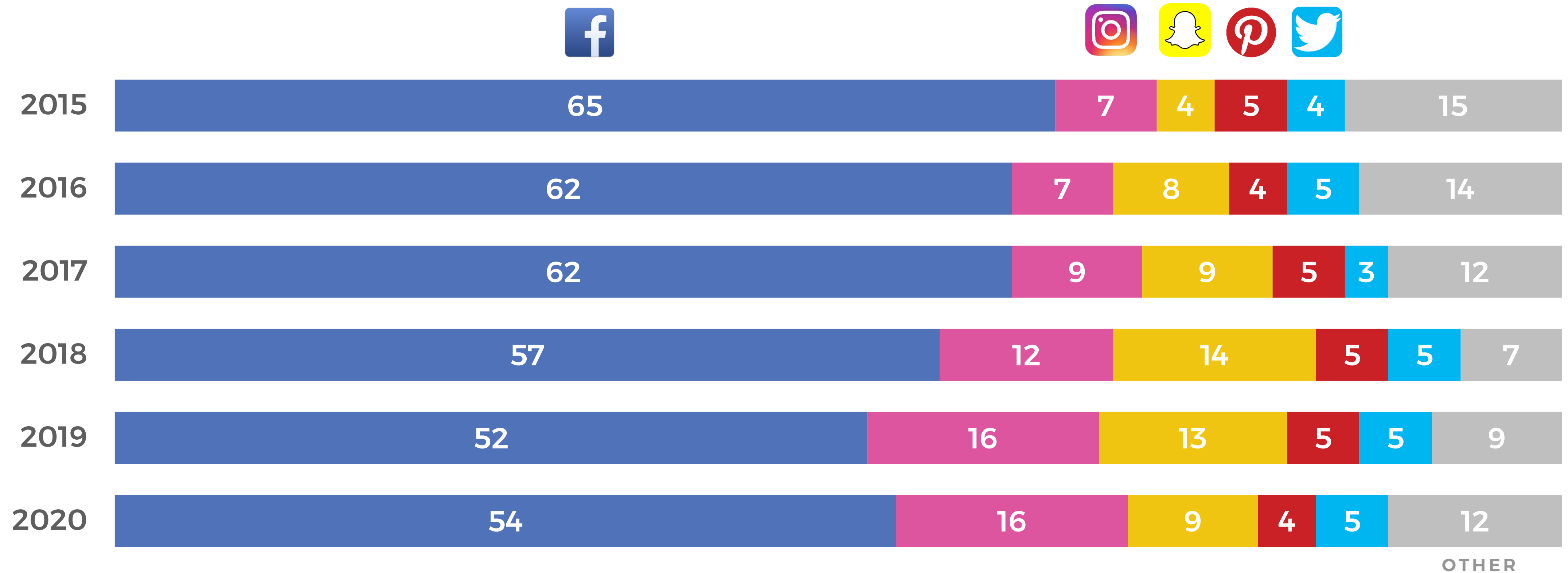
U.S. POPULATION

% USING SOCIAL MEDIA BRAND



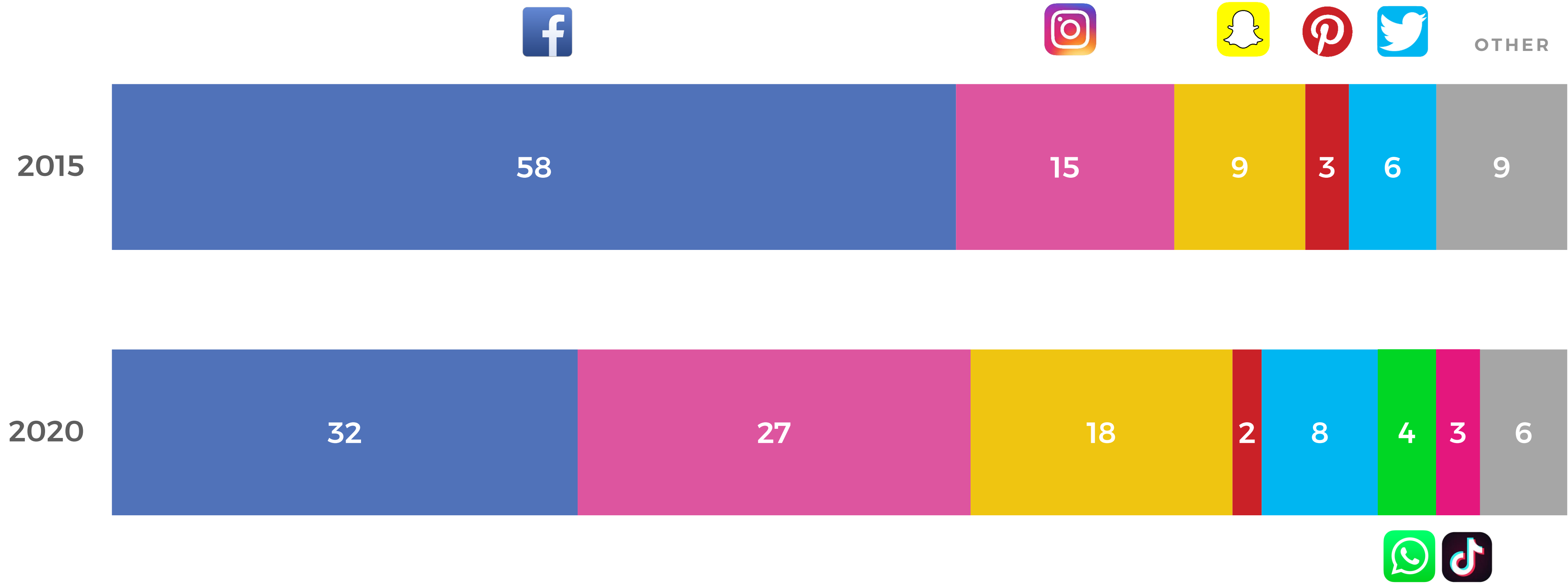
# Social Media Brand Used Most Often

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



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

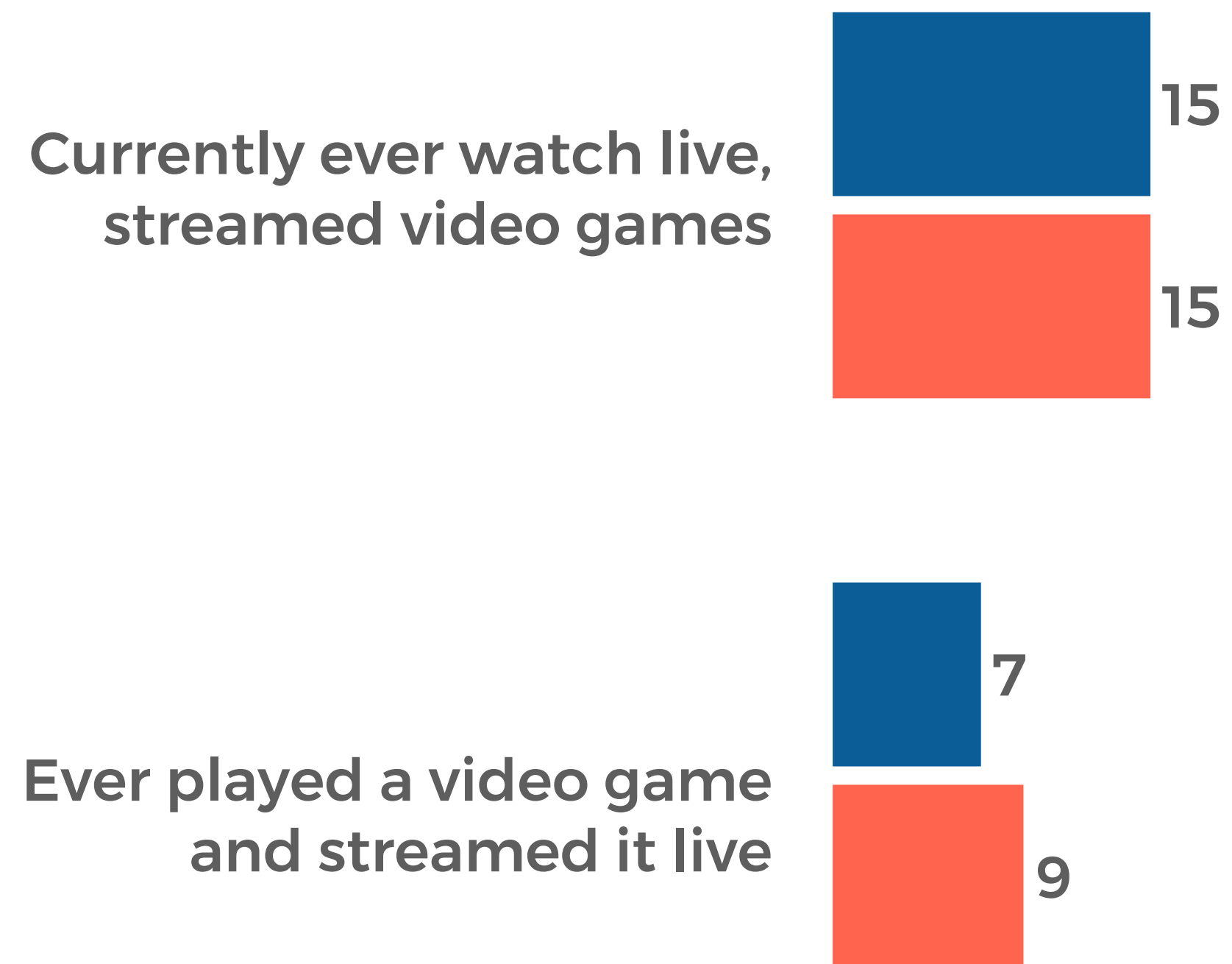
BASE: U.S. SOCIAL MEDIA USERS



# Live Streamed Video Games

TOTAL U.S. POPULATION 12+

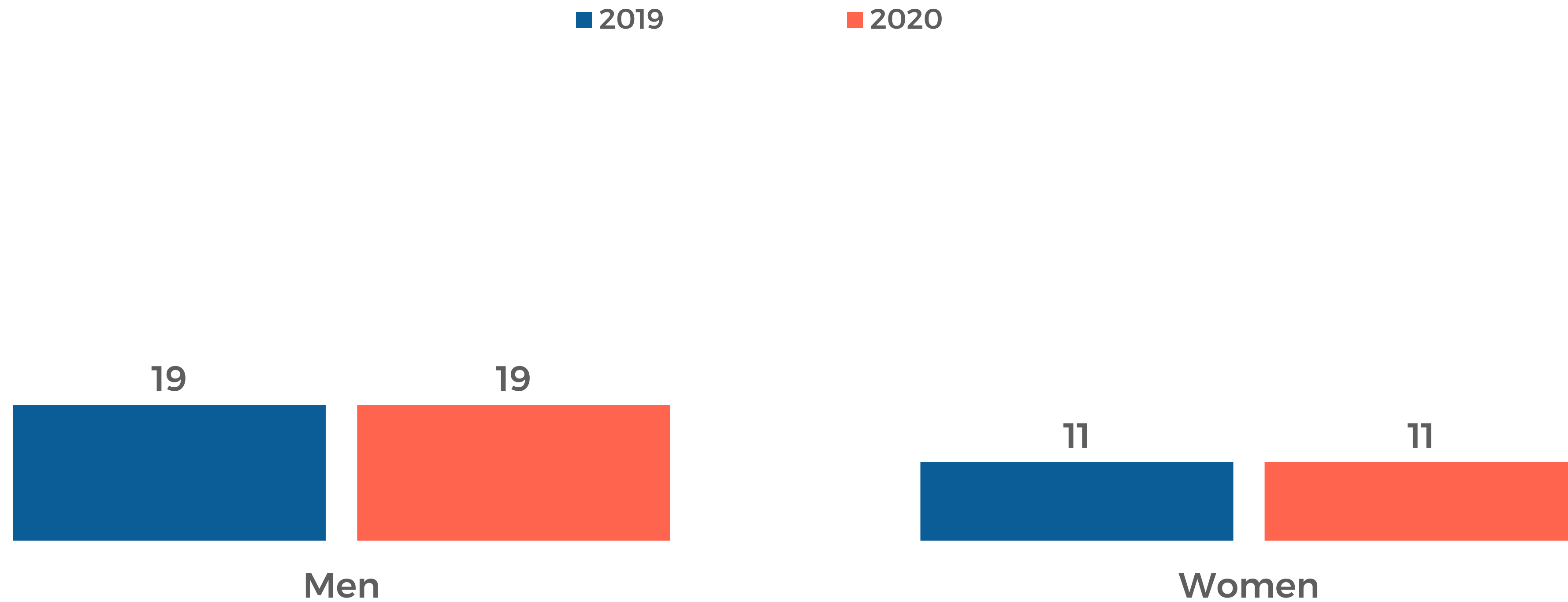
% SAYING YES



# Currently Ever Watch Live Streamed Video Games

TOTAL U.S. POPULATION 12+

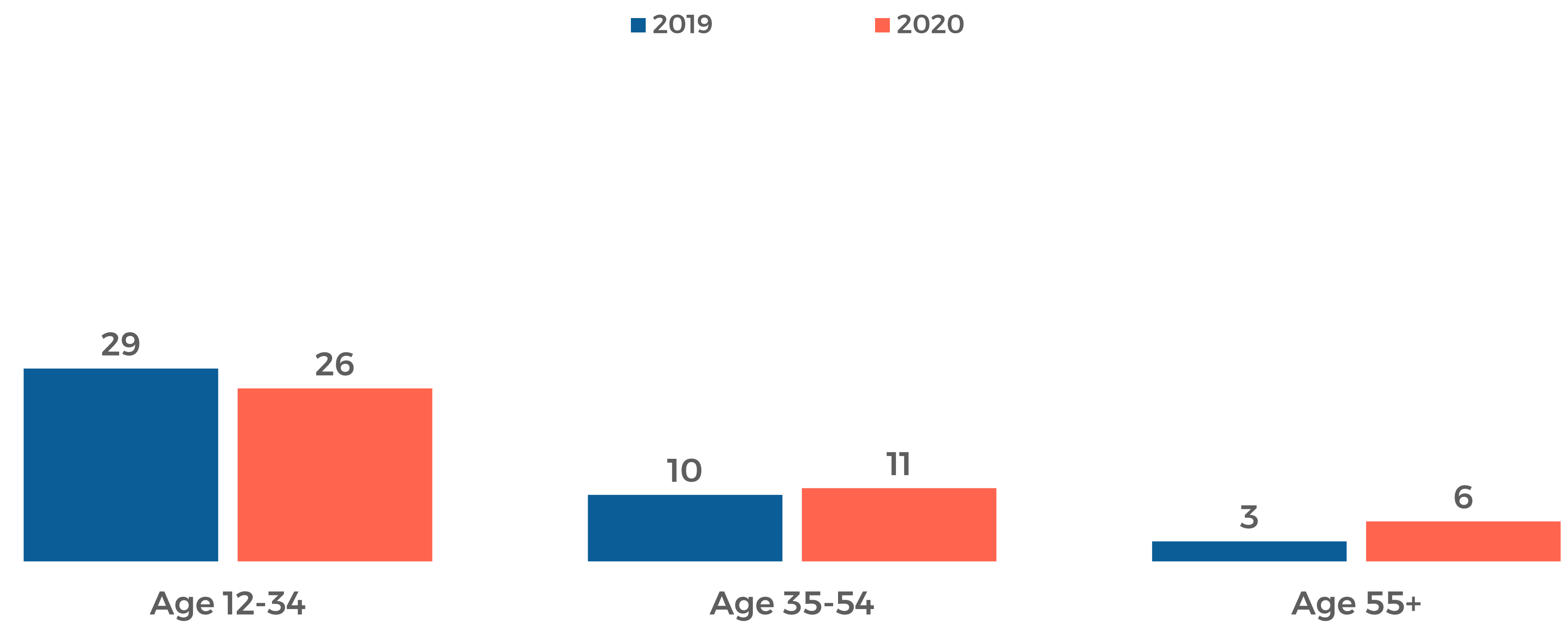
% SAYING YES



# Currently Ever Watch Live Streamed Video Games

TOTAL U.S. POPULATION 12+

% SAYING YES

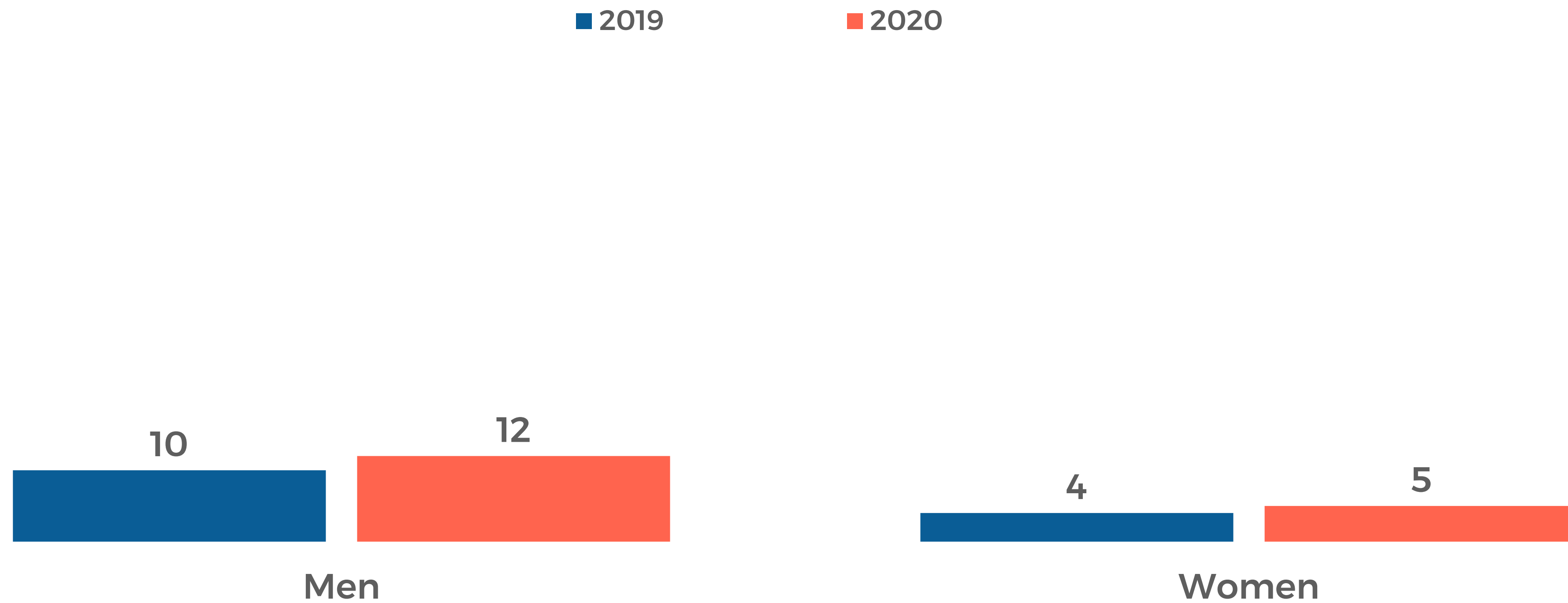


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# Ever Played a Video Game and Streamed It Live

TOTAL U.S. POPULATION 12+

% SAYING YES

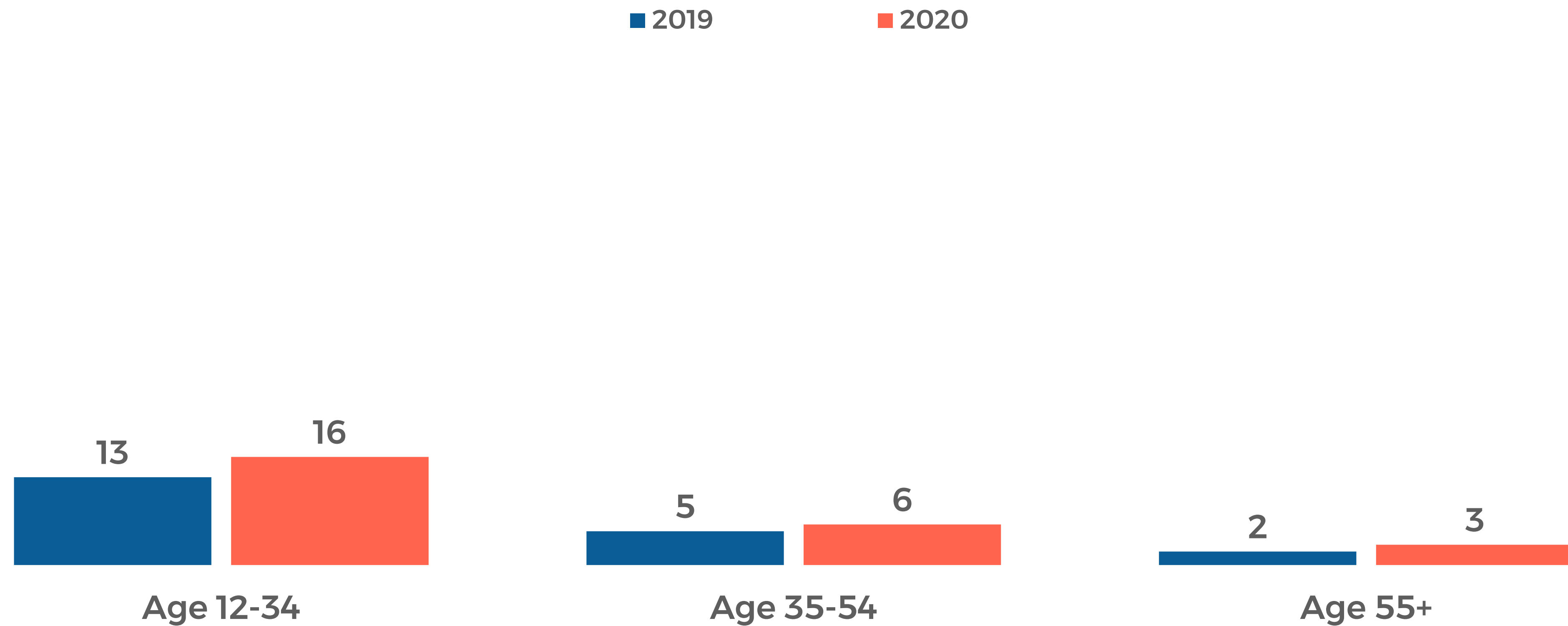




# Ever Played a Video Game and Streamed It Live

TOTAL U.S. POPULATION 12+

% SAYING YES



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# Online Audio



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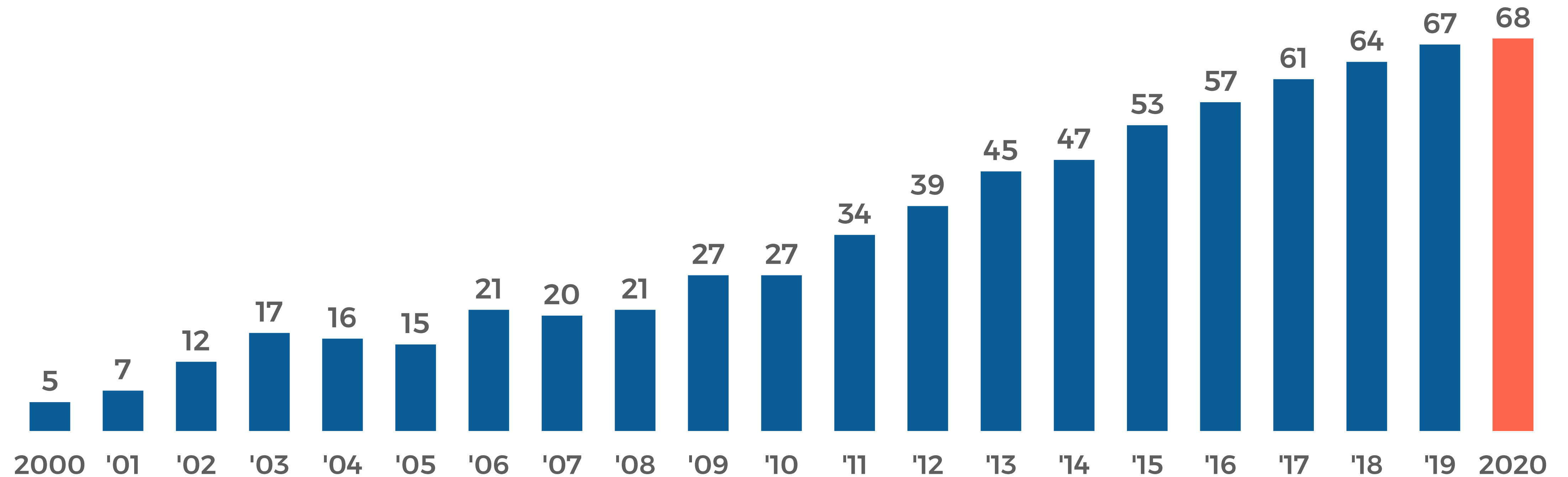
# Monthly Online Audio Listening

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  
**192 Million**



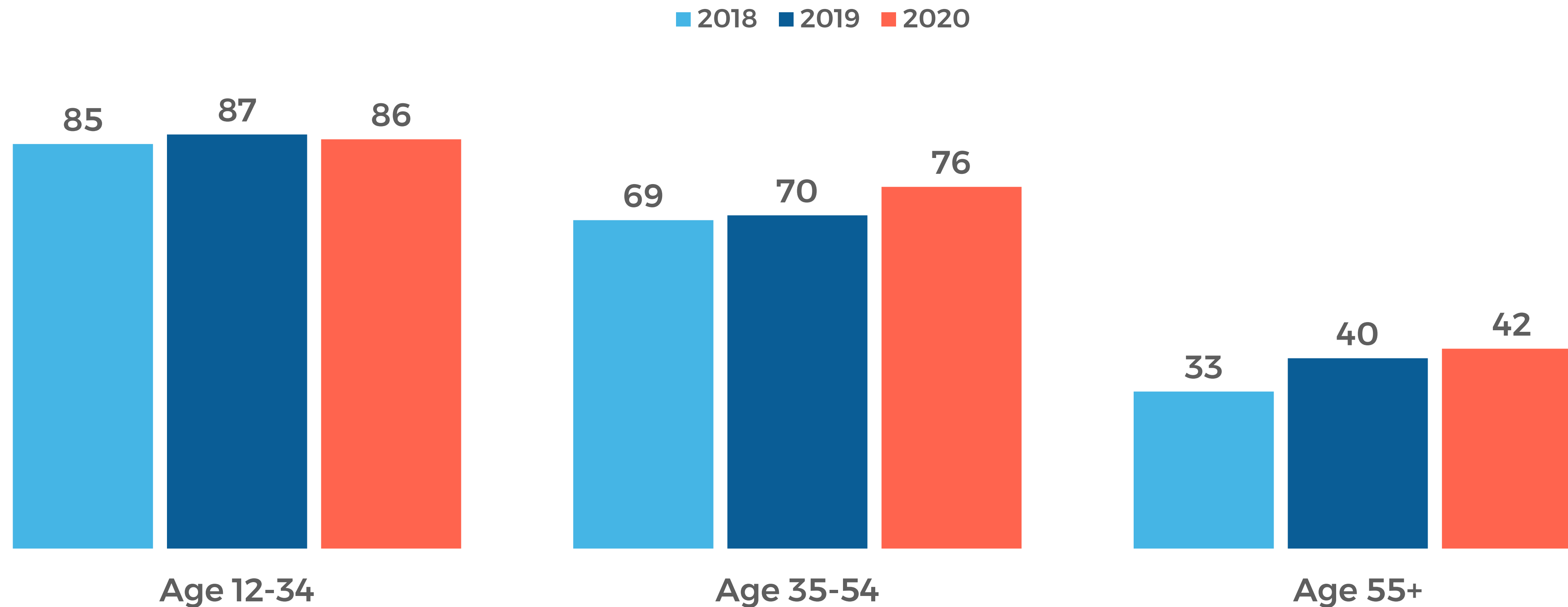
#InfiniteDial

# 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

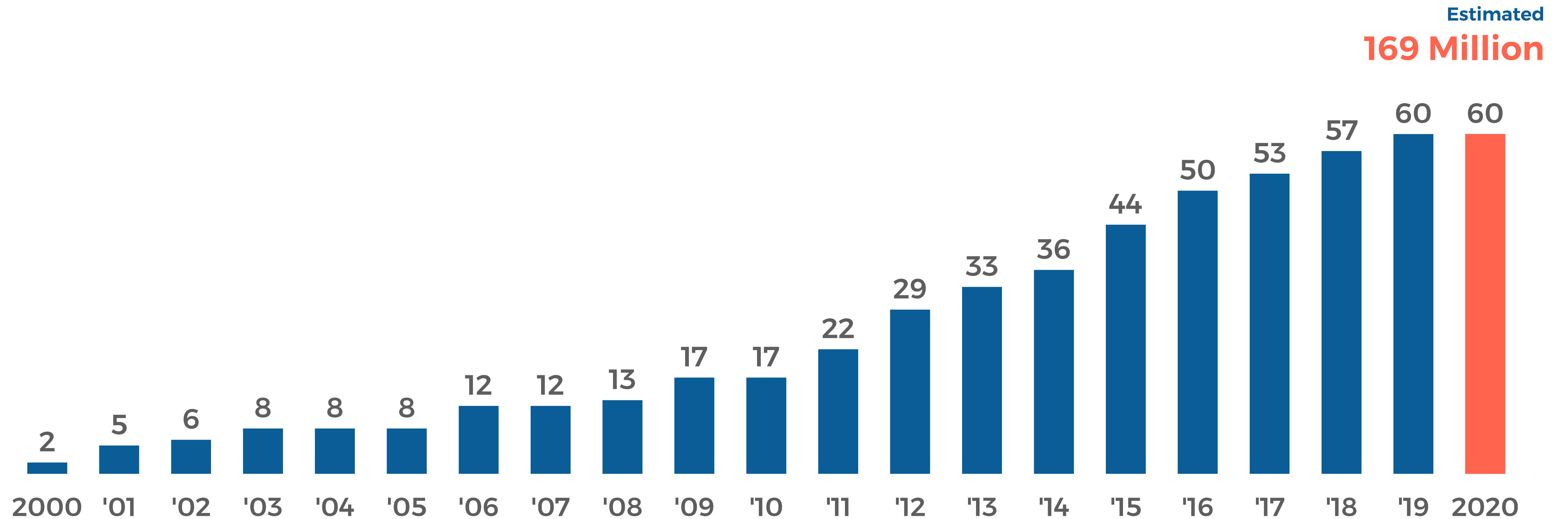


# Weekly Online Audio Listening

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

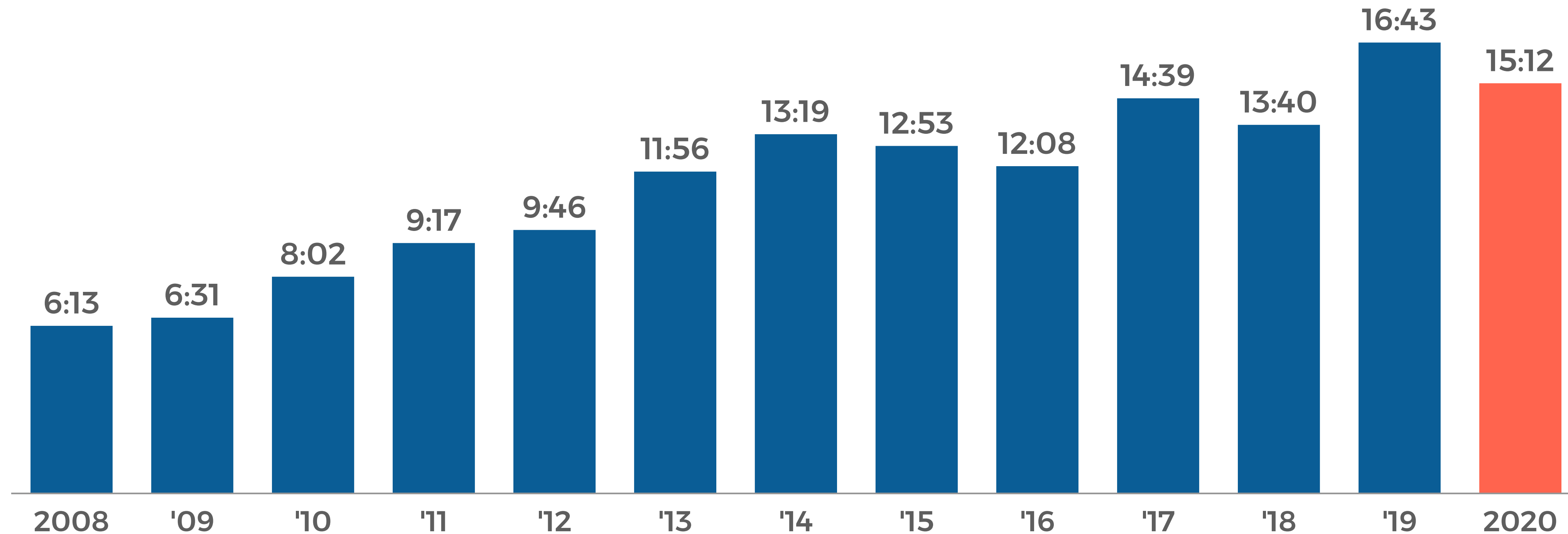


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# Average Time Spent Listening to Online Audio

BASE: U.S. AGE 12+ WEEKLY ONLINE AUDIO LISTENERS

HOURS:MINUTES IN LAST WEEK



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# Audio Brands



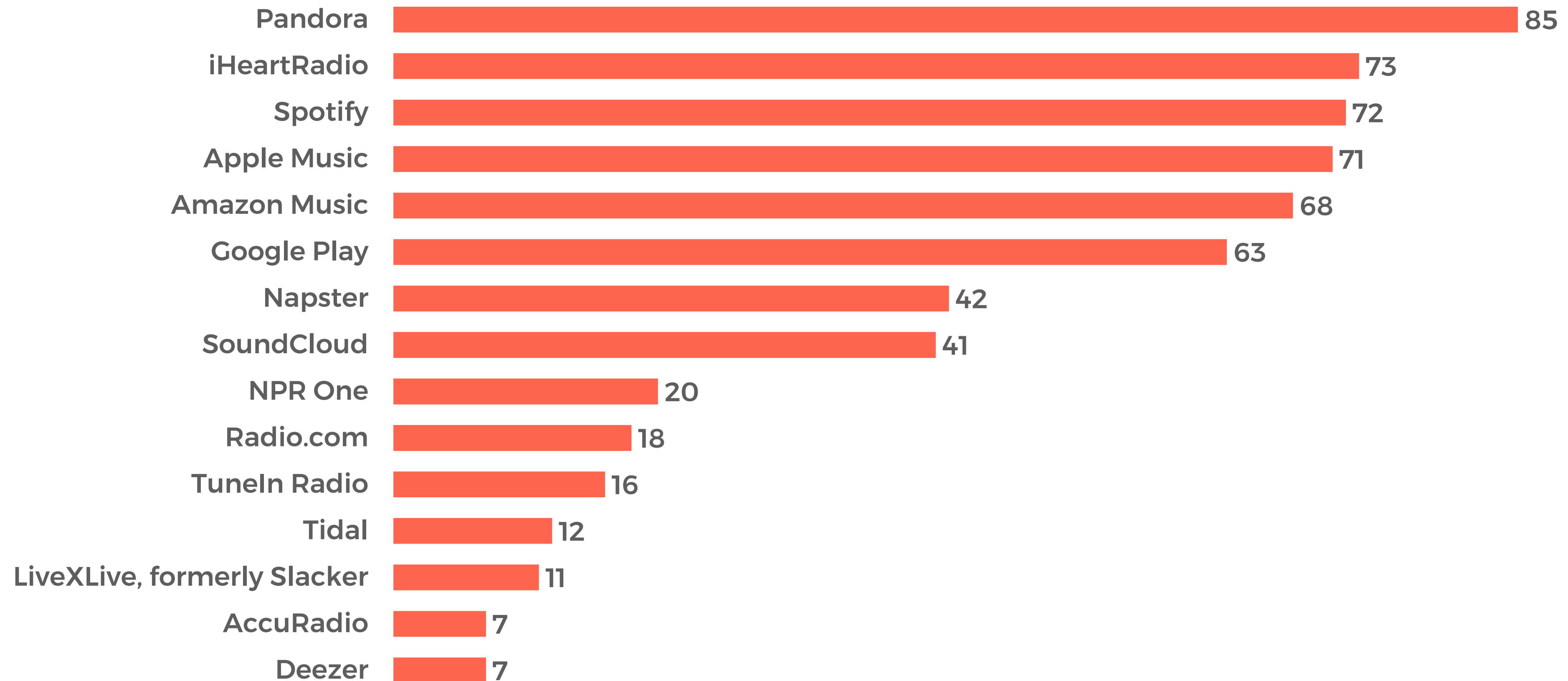
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# Audio Brand Awareness

TOTAL U.S. POPULATION 12+

% AWARE OF AUDIO BRAND

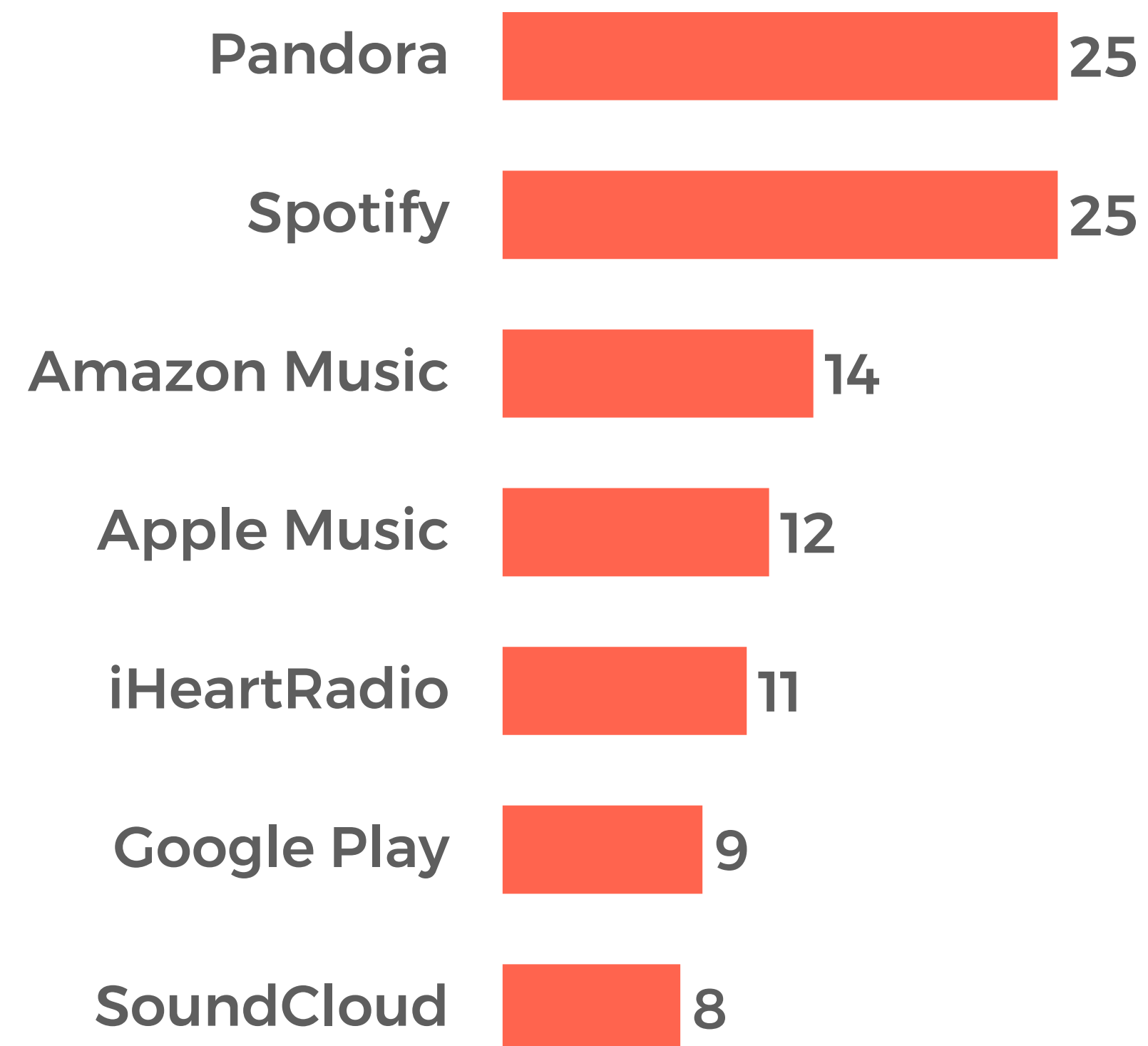




# Audio Brands Listened to in Last Month

TOTAL U.S. POPULATION 12+

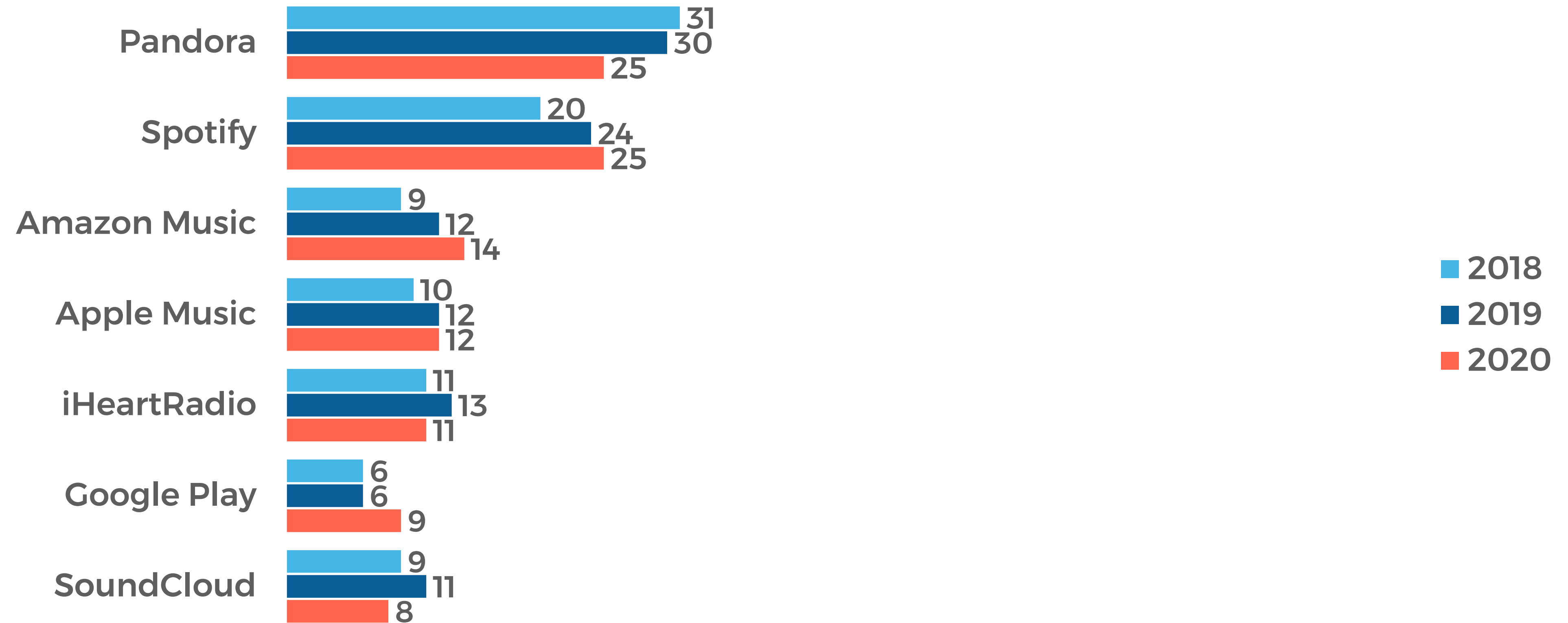
% LISTENED TO AUDIO BRAND IN LAST MONTH



# Audio Brands Listened to in Last Month

TOTAL U.S. POPULATION 12+

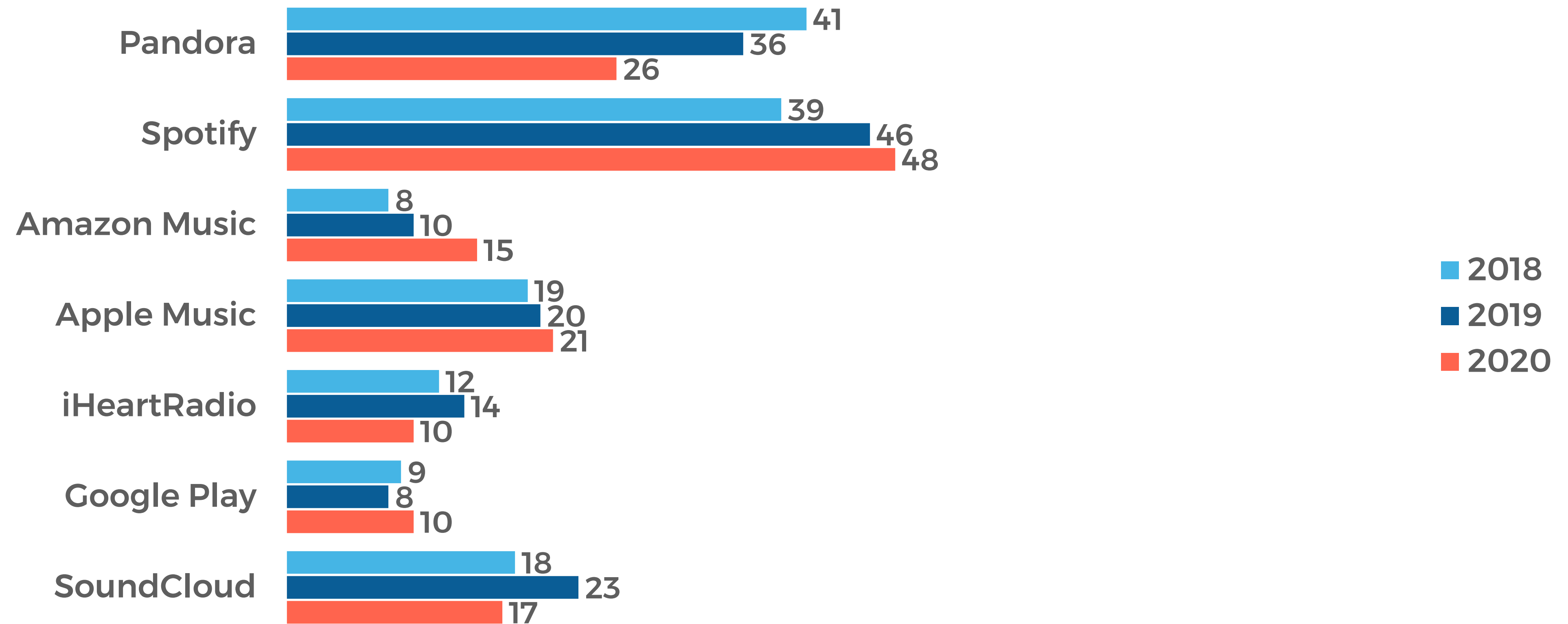
% LISTENED TO AUDIO BRAND IN LAST MONTH



# Audio Brand Listened to in Last Month (Age 12-34)

U.S. POPULATION

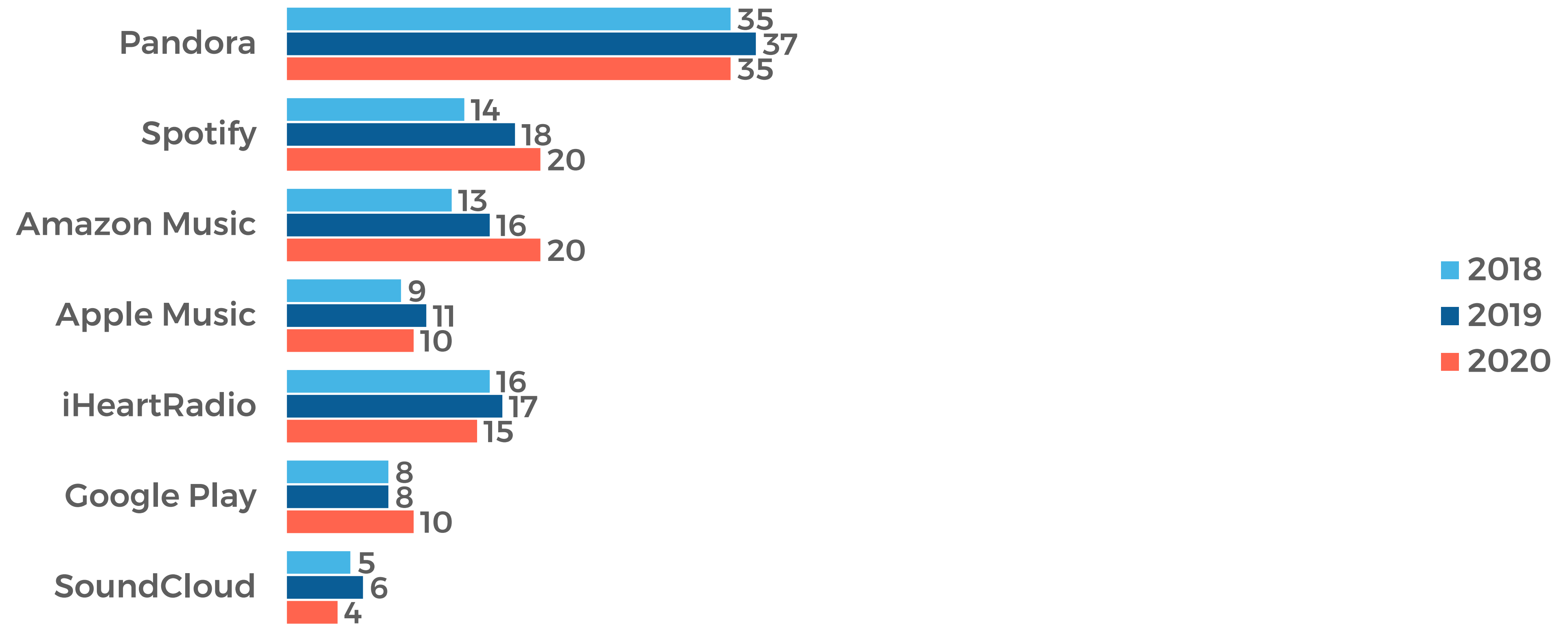
% LISTENED TO AUDIO BRAND IN LAST MONTH



# Audio Brand Listened to in Last Month (Age 35-54)

U.S. POPULATION

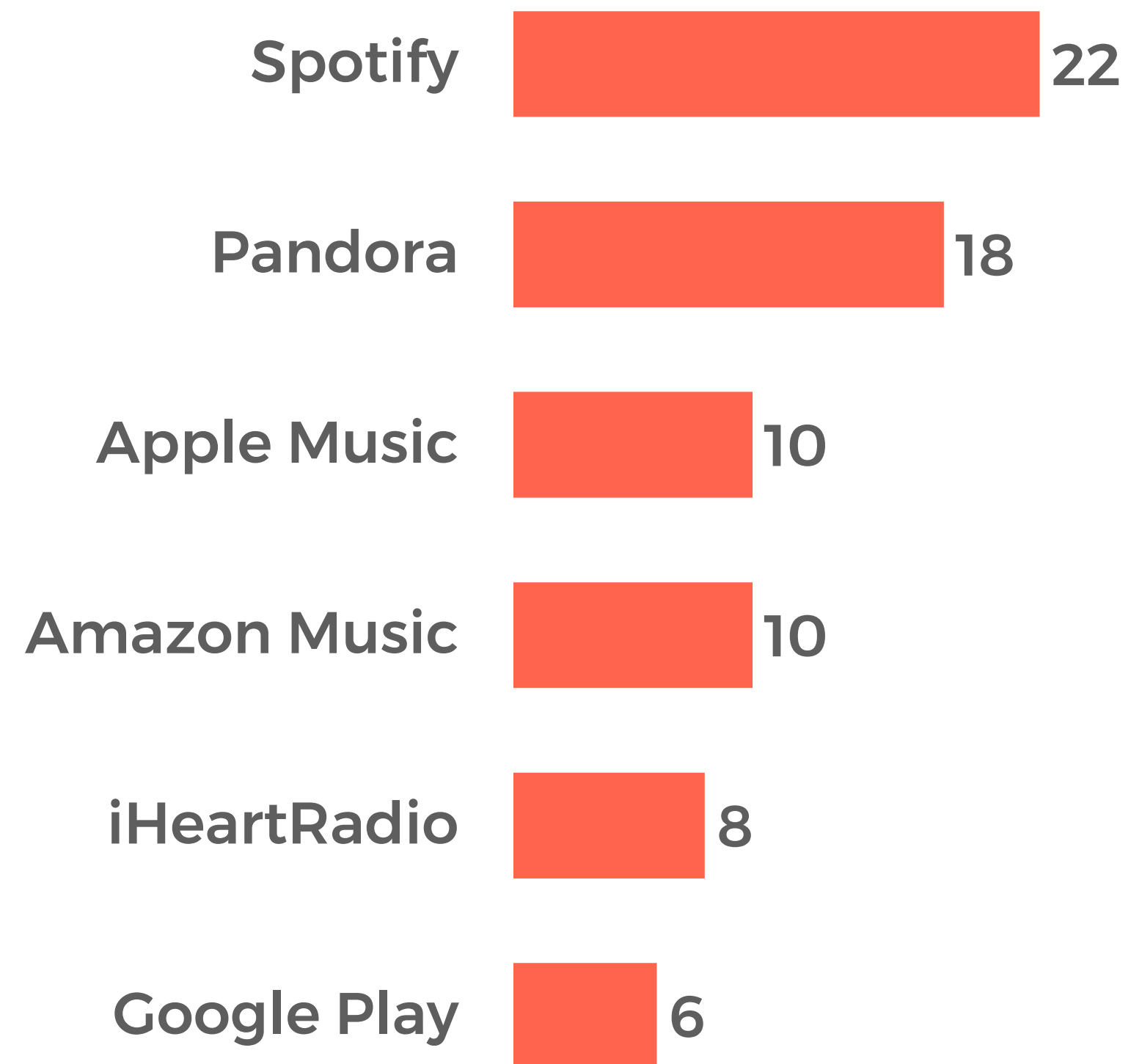
% LISTENED TO AUDIO BRAND IN LAST MONTH



# Audio Brands Listened to in Last Week

TOTAL U.S. POPULATION 12+

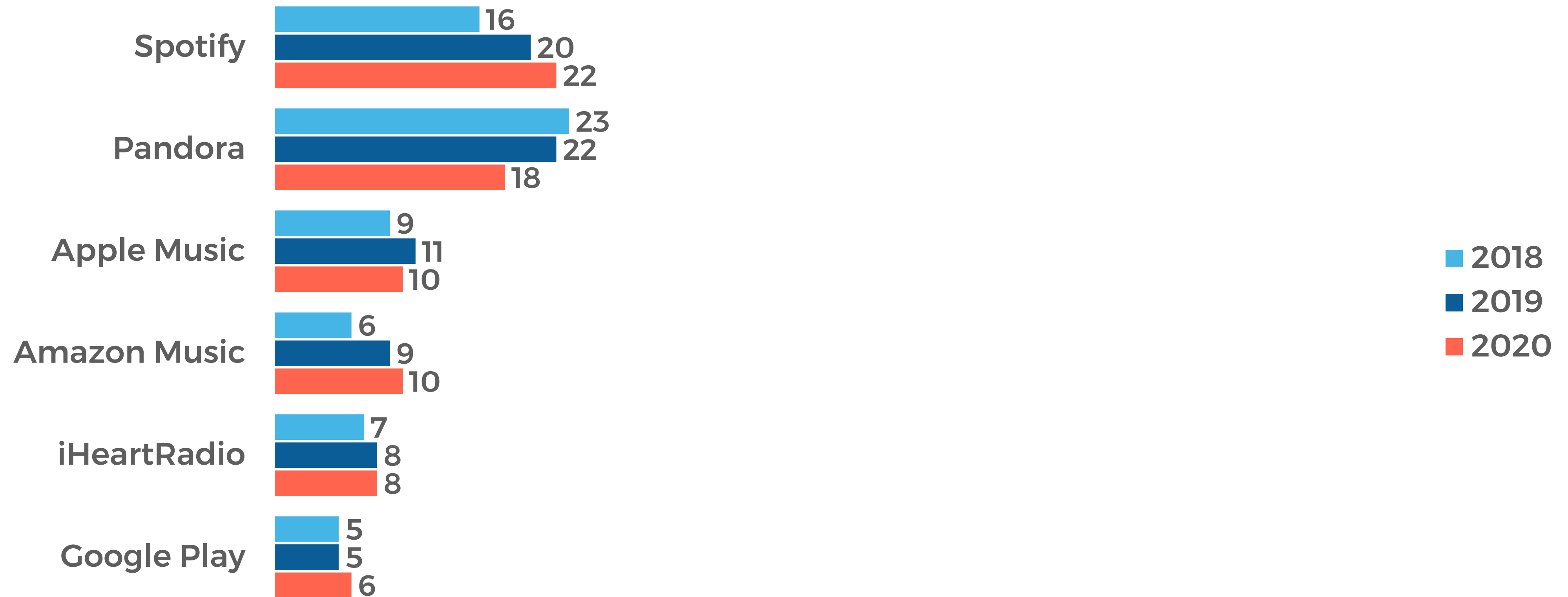
% LISTENED TO AUDIO BRAND IN LAST WEEK



# Audio Brands Listened to in Last Week

TOTAL U.S. POPULATION 12+

% LISTENED TO AUDIO BRAND IN LAST WEEK



# Pandora/SoundCloud Awareness and Usage

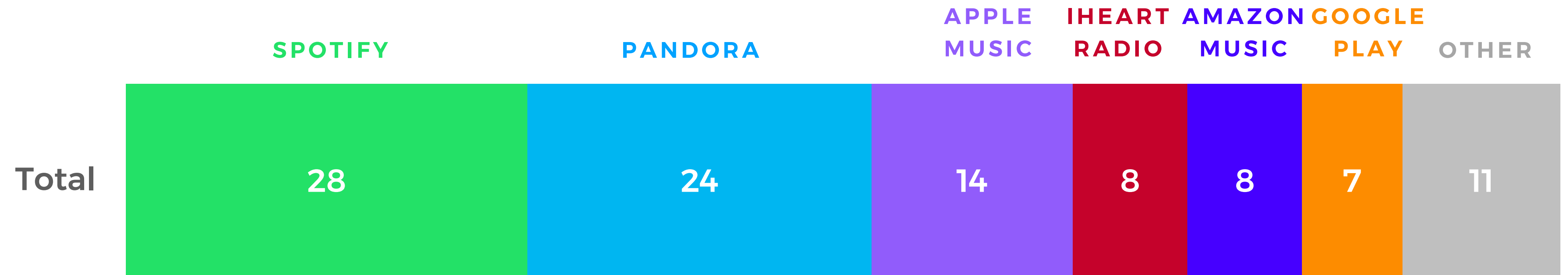
TOTAL U.S. POPULATION 12+

% SAYING YES



# Audio Brand Used Most Often

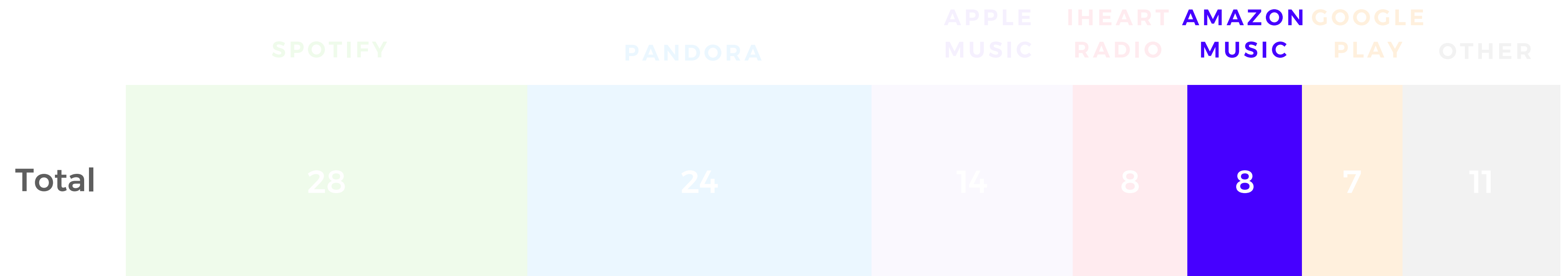
BASE: U.S. AGE 12+ AND CURRENTLY EVER USE ANY AUDIO BRAND





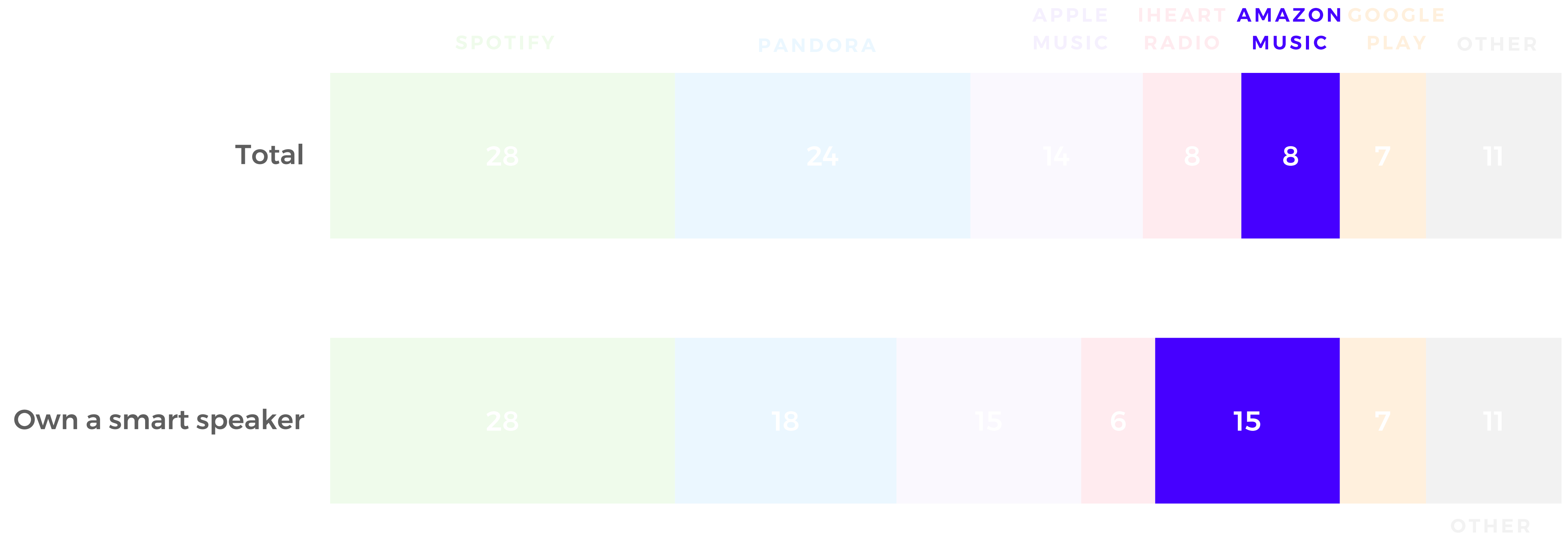
# Audio Brand Used Most Often

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



# Audio Brand Used Most Often

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



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# In-Car Media



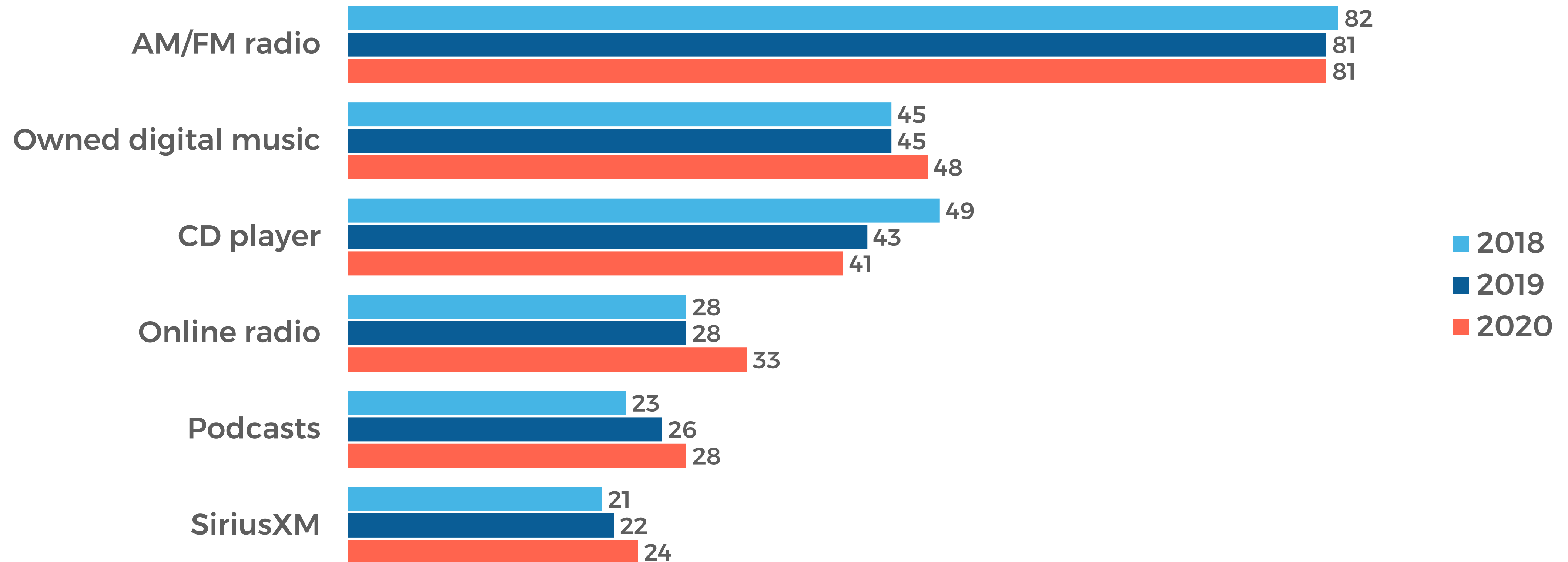
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# Audio Sources Currently Ever Used in Car

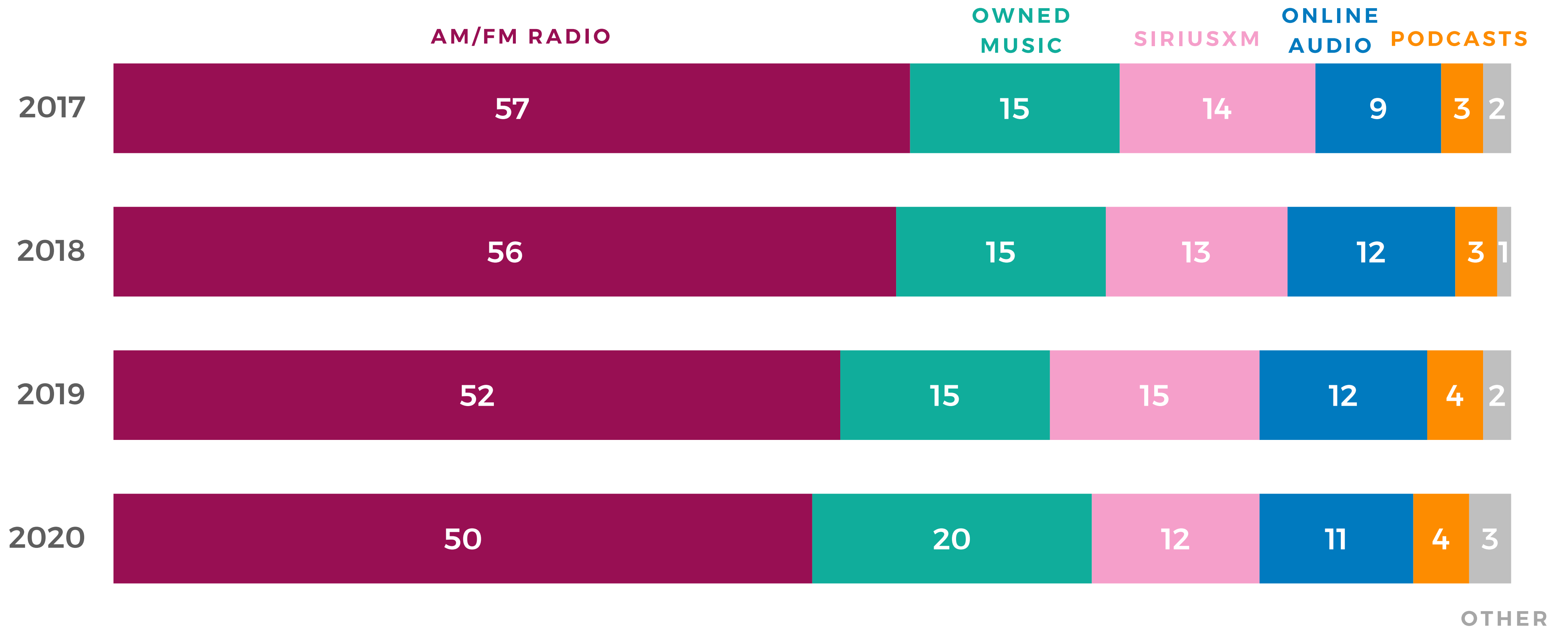
BASE: U.S. AGE 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 89%

% USING AUDIO SOURCE IN CAR



# Audio Source Used Most Often in Car

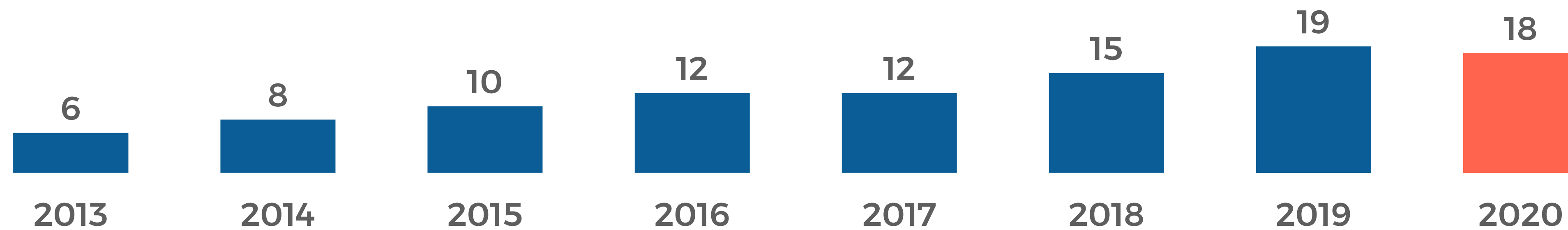
BASE: U.S. AGE 18+, DRIVEN/RIDDEN IN CAR IN LAST MONTH, AND USE ANY AUDIO SOURCE IN CAR



# 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



# Vehicle Integrated Mobile Operating Systems

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

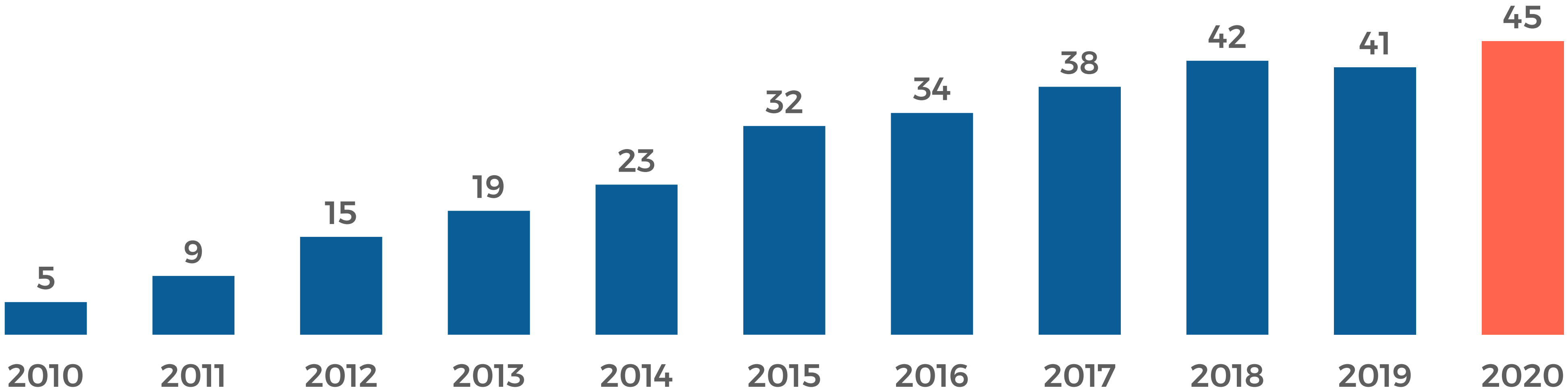
% HAVE SYSTEM IN PRIMARY VEHICLE



# 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



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# Podcasting



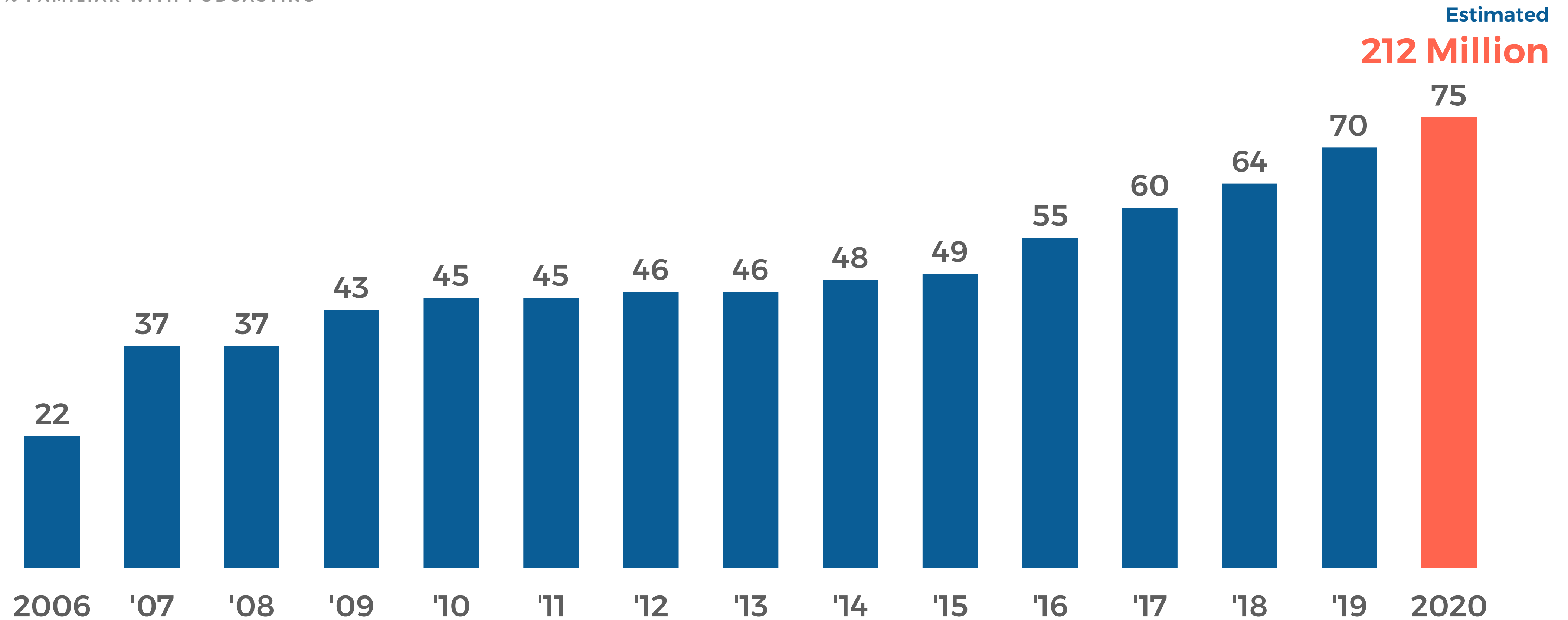
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# Podcasting Familiarity

TOTAL U.S. POPULATION 12+

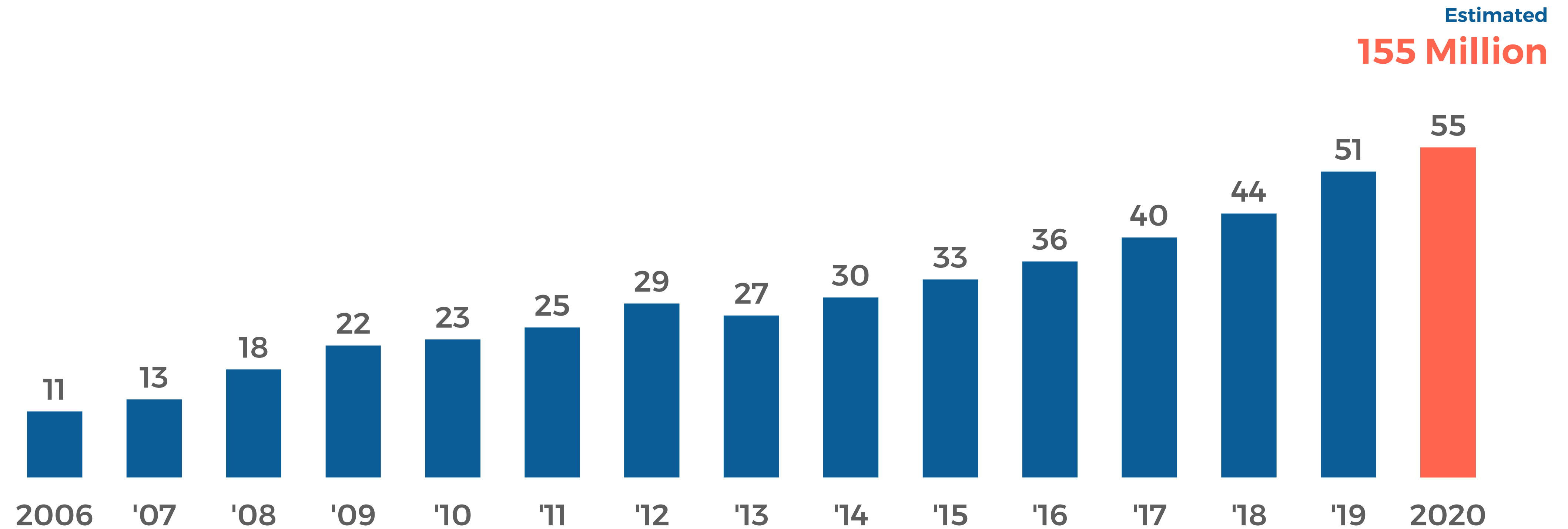
% FAMILIAR WITH PODCASTING



# Podcasting Listening

TOTAL U.S. POPULATION 12+

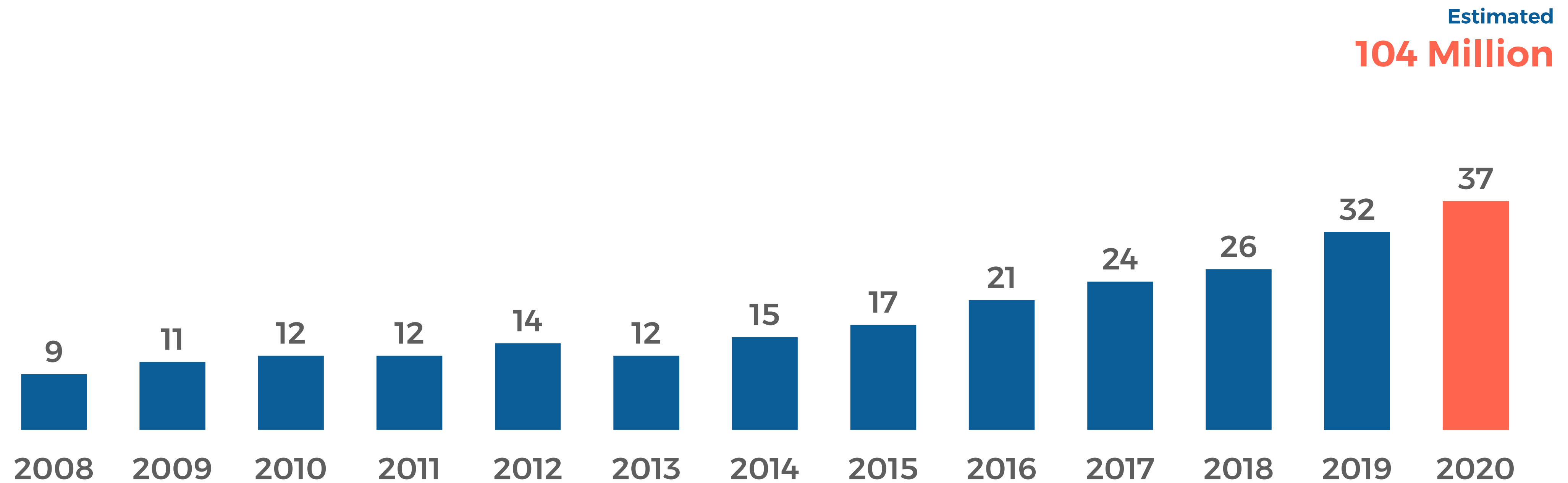
% EVER LISTENED TO A PODCAST



# Monthly Podcast Listening

TOTAL U.S. POPULATION 12+

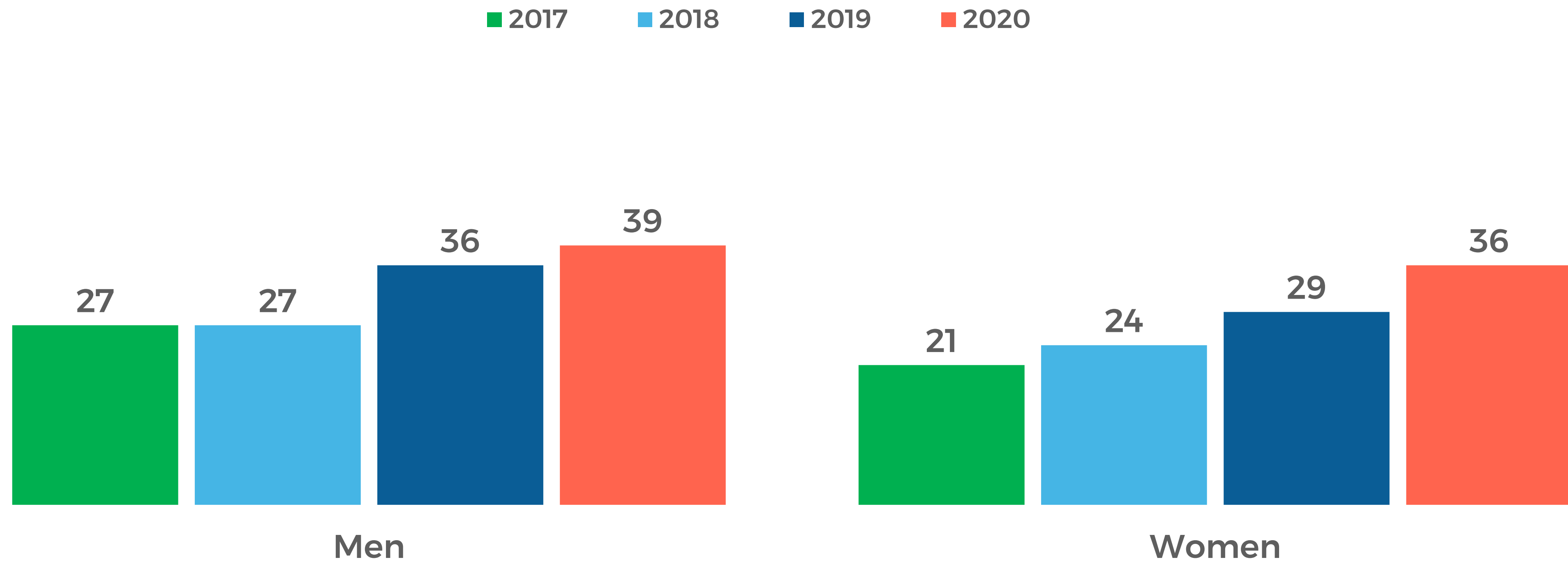
% LISTENED TO A PODCAST IN LAST MONTH



# Monthly Podcast Listening

U.S. POPULATION

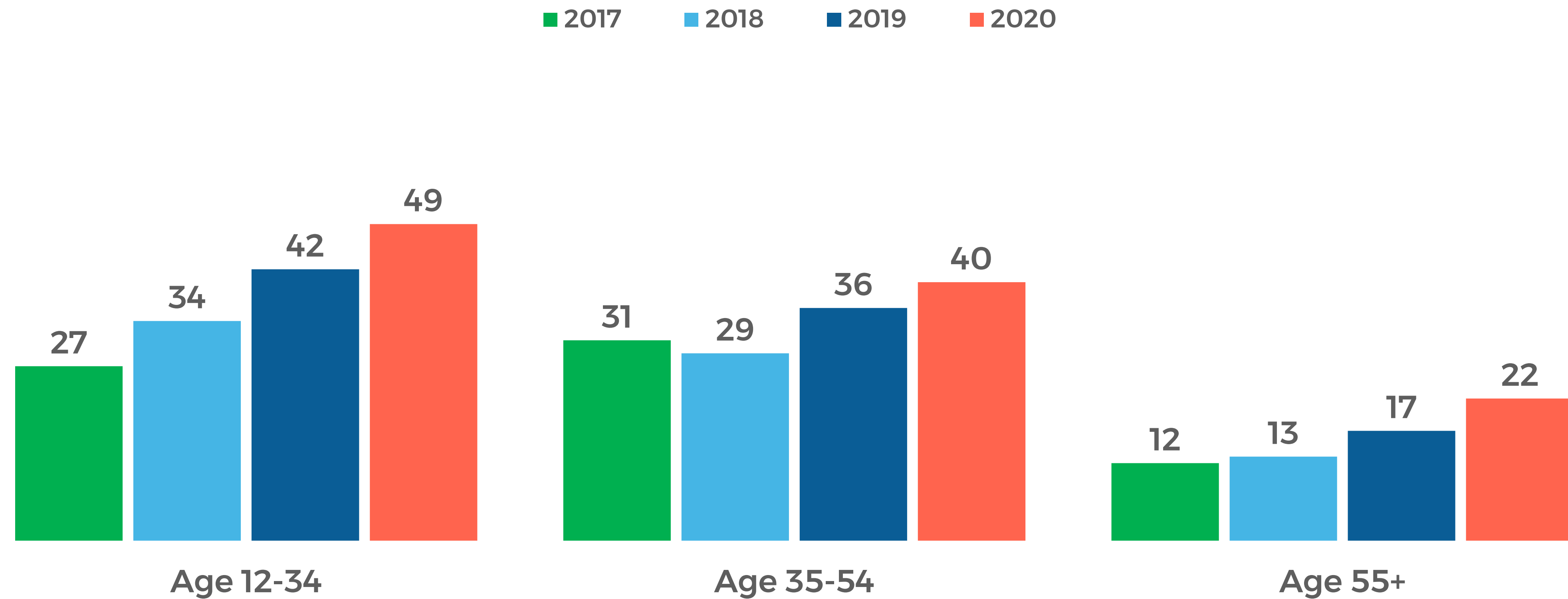
% LISTENED TO A PODCAST IN LAST MONTH



# Monthly Podcast Listening

U.S. POPULATION

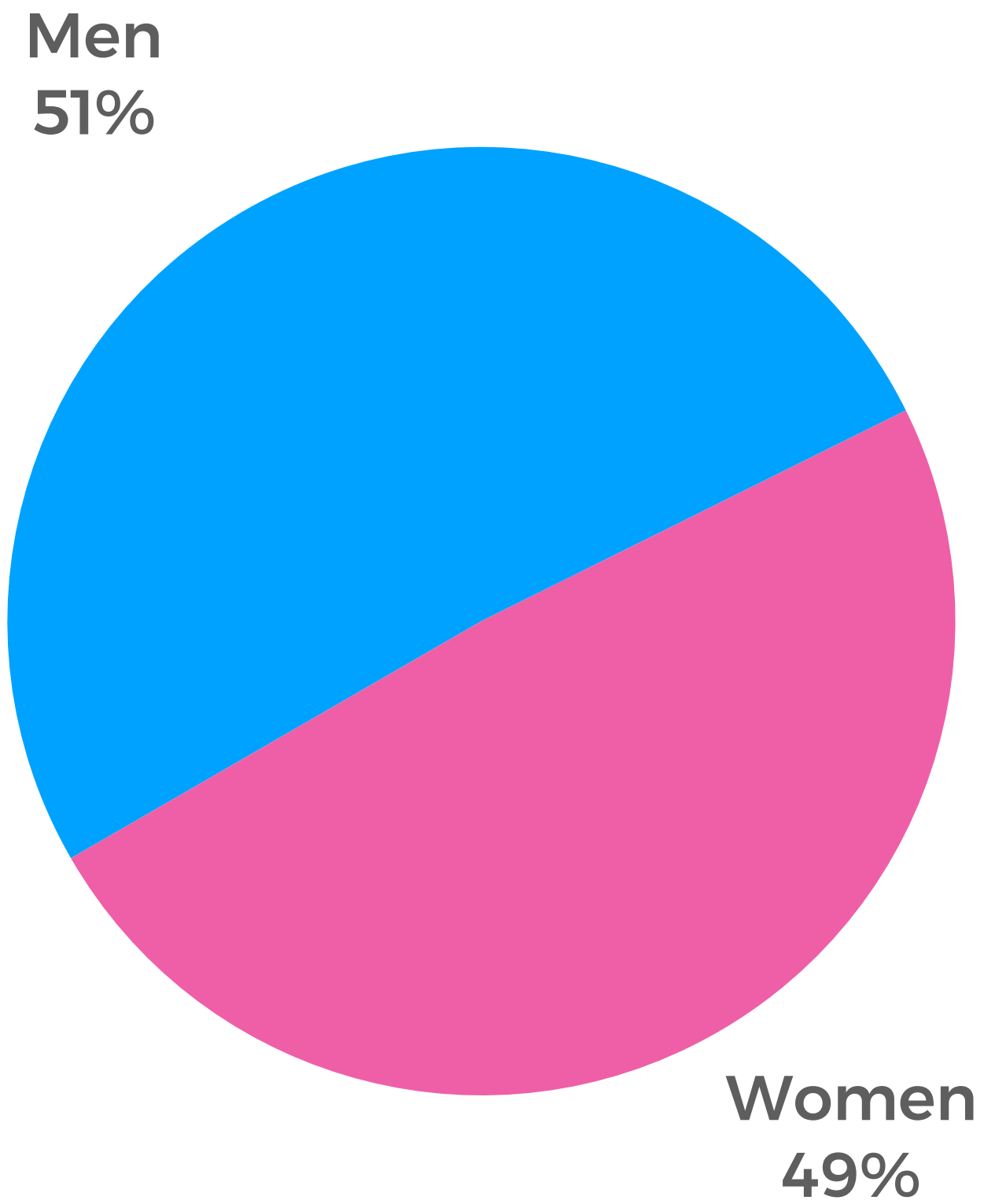
% LISTENED TO A PODCAST IN LAST MONTH



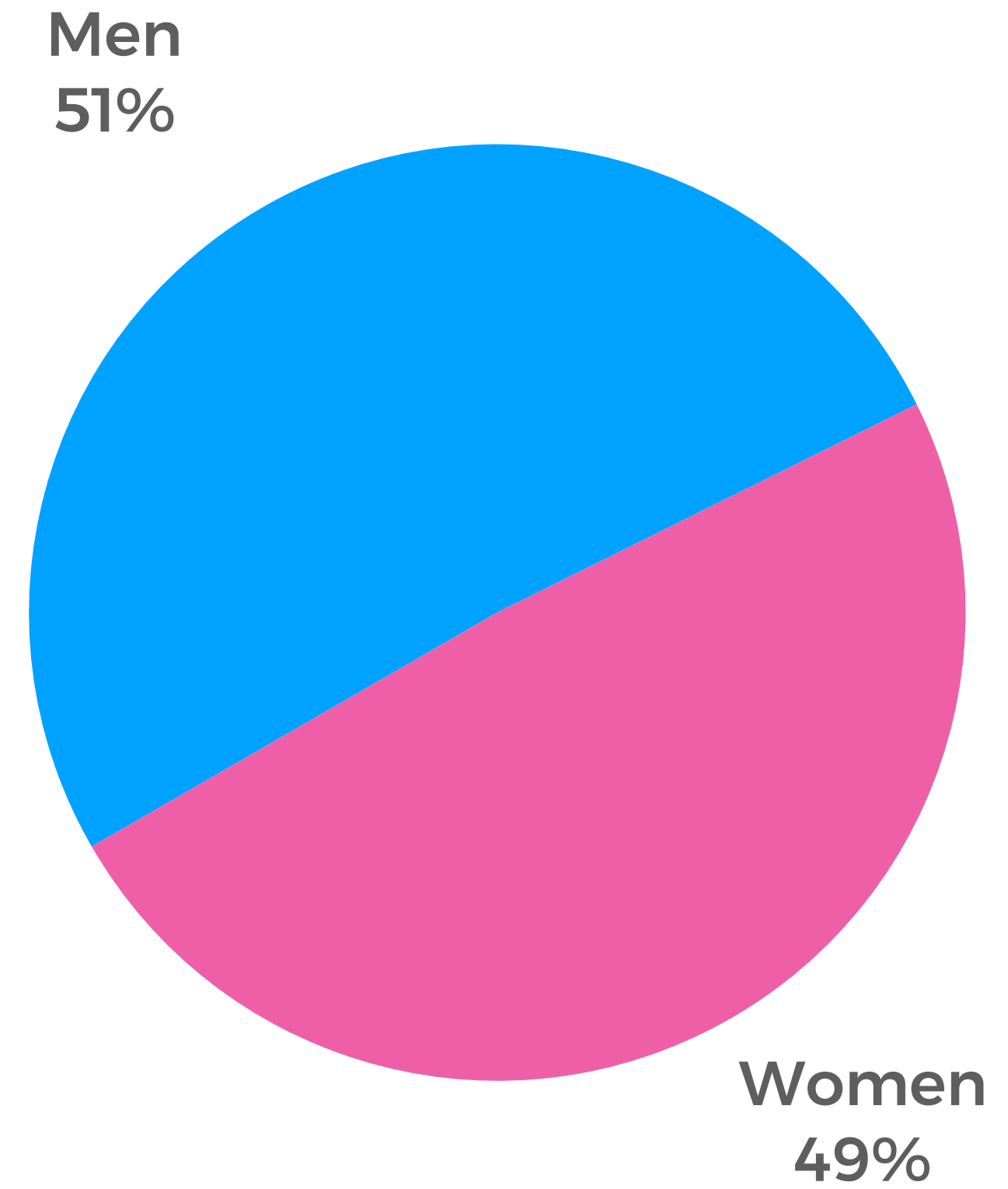
# Sex of Monthly Podcast Listeners

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

U.S. POPULATION 12+



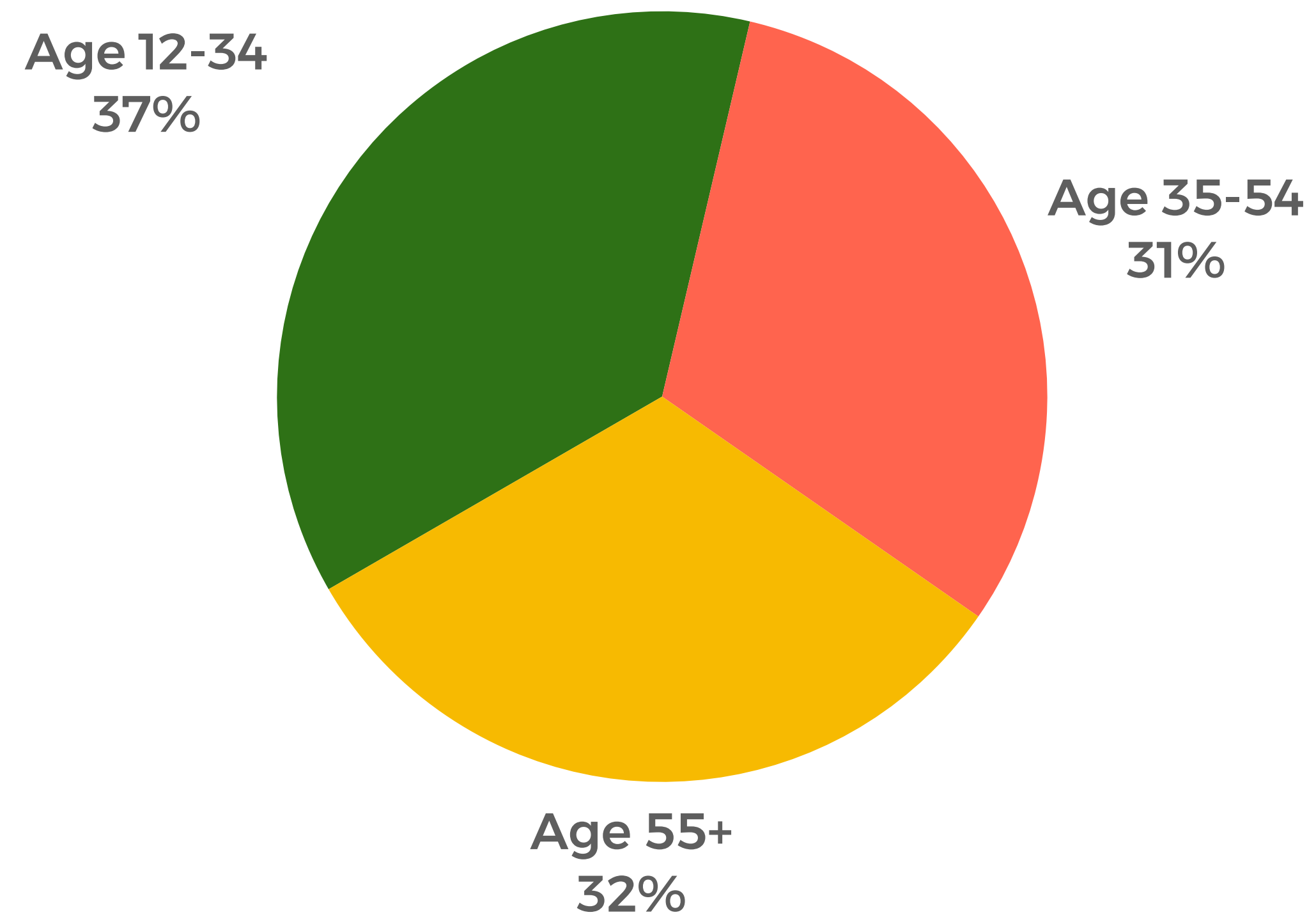
MONTHLY PODCAST CONSUMERS 12+



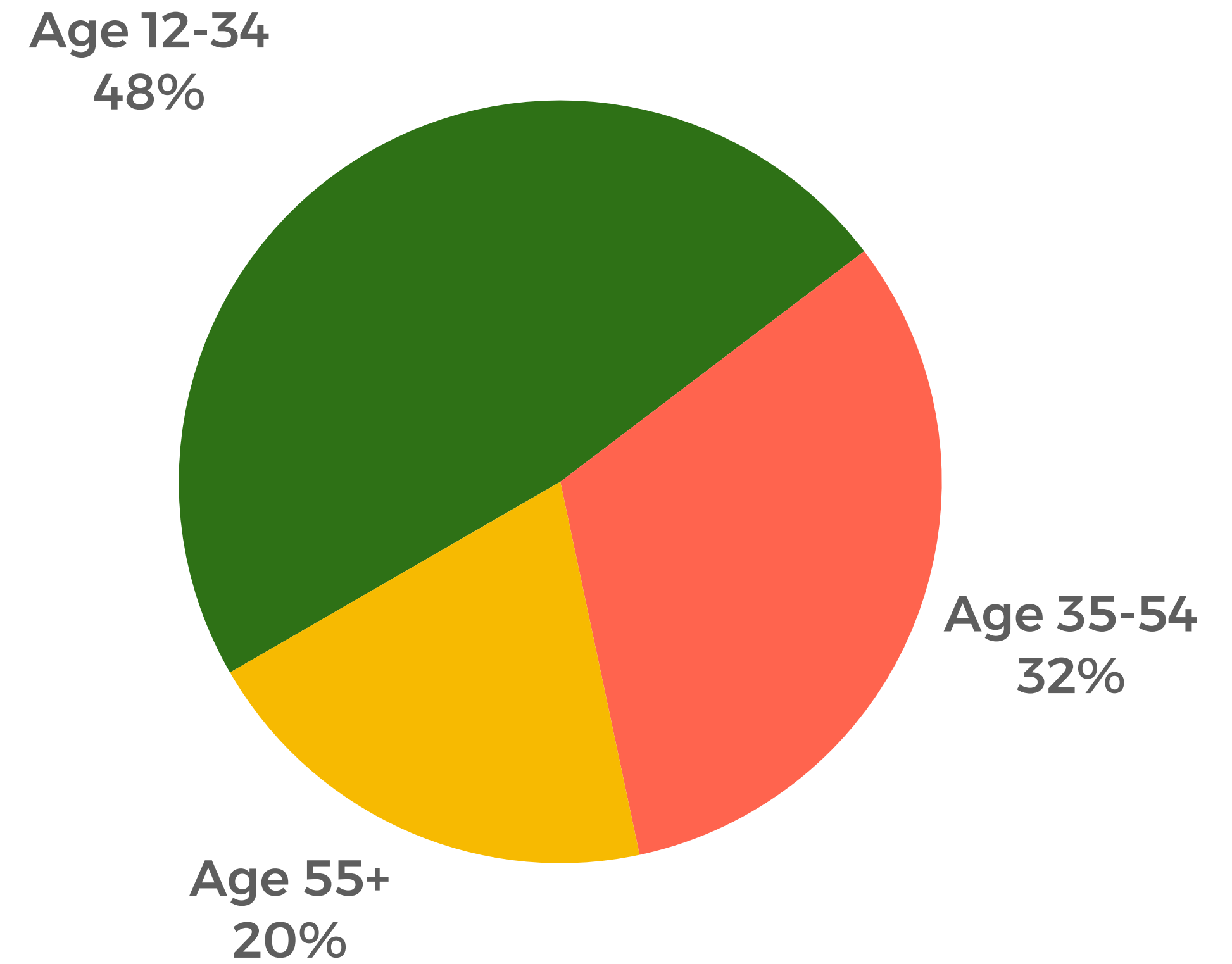
# Age of Monthly Podcast Listeners

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

U.S. POPULATION 12+



MONTHLY PODCAST CONSUMERS 12+

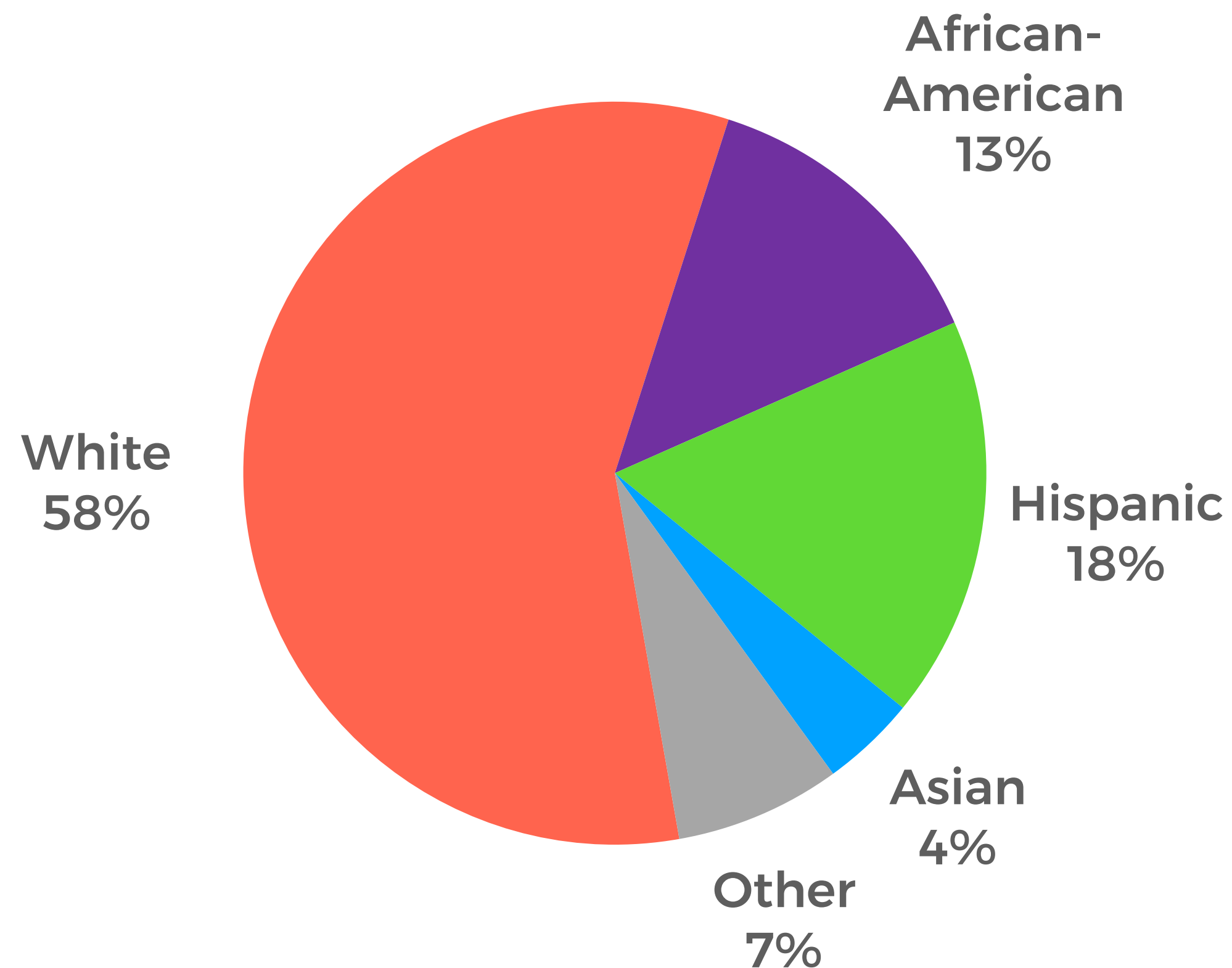




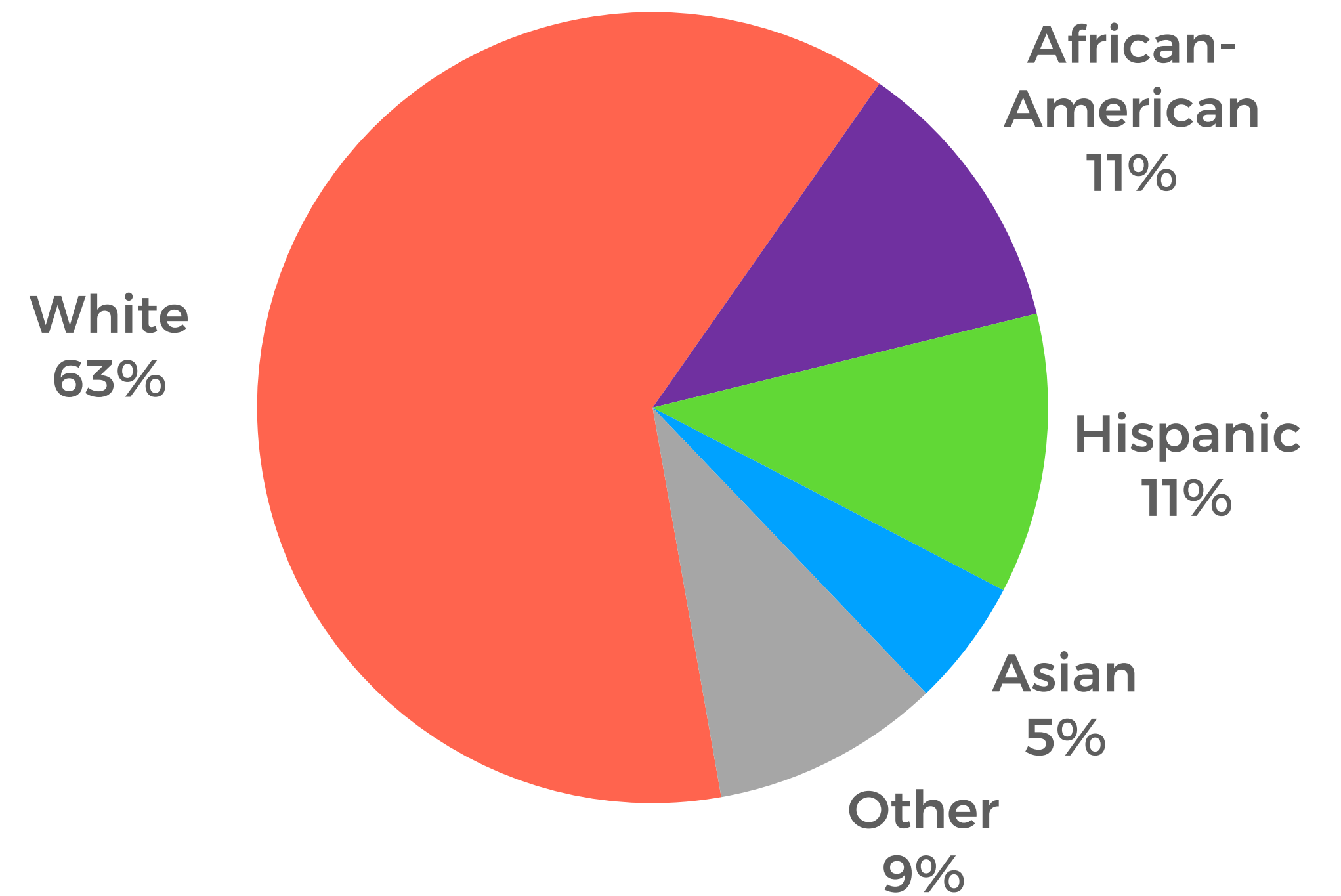
# Ethnicity of Monthly Podcast Listeners

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

U.S. POPULATION 12+



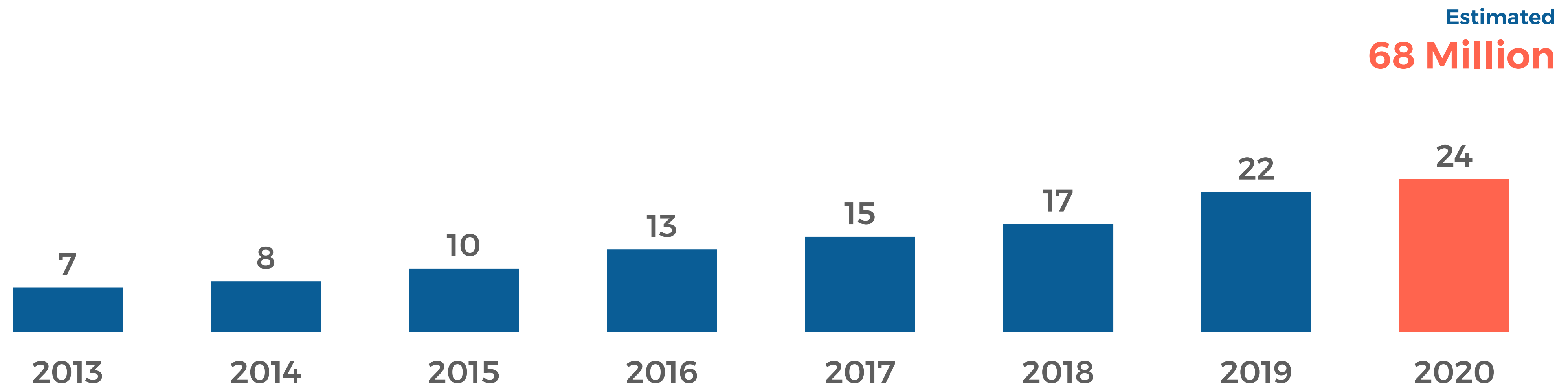
MONTHLY PODCAST CONSUMERS 12+



# Weekly Podcast Listening

TOTAL U.S. POPULATION 12+

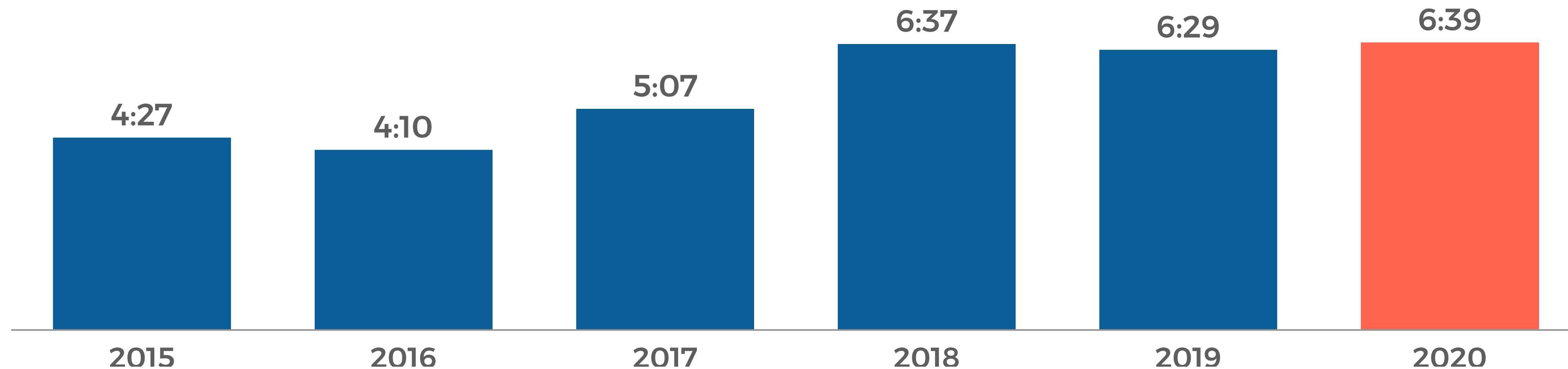
% LISTENED TO A PODCAST IN LAST WEEK



# Average Time Spent Listening to Podcasts

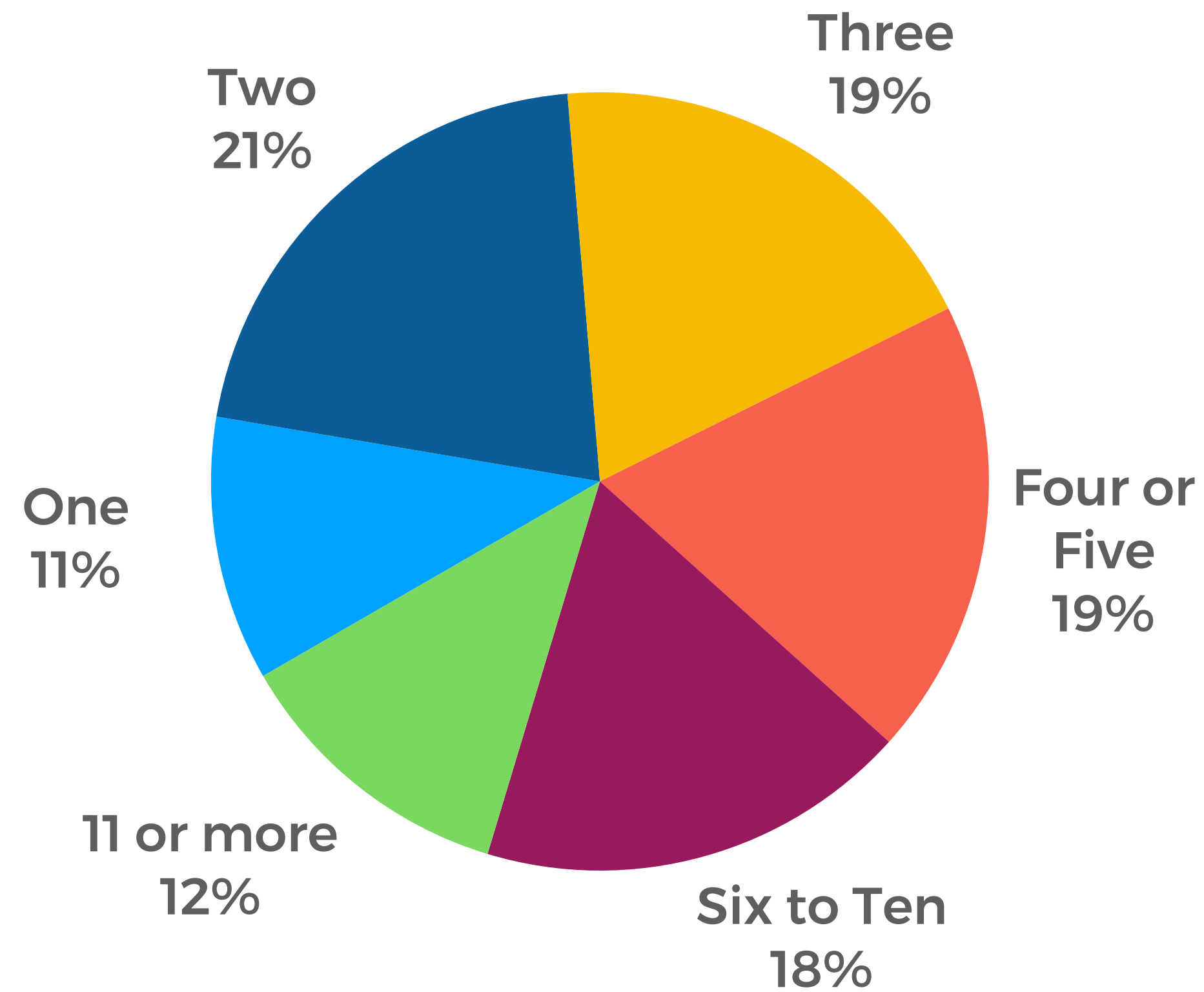
BASE: U.S. AGE 12+ AND LISTENED TO PODCAST IN LAST WEEK

HOURS:MINUTES IN LAST WEEK



# Number of Podcasts Listened to in Last Week

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



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.



**Coming Soon**

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](http://www.edisonresearch.com)

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