



THE INFINITE DIAL

2016

#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 2016, The Infinite Dial tracks and covers new research on mobile behaviors, Internet Radio, Podcasting, Social Media and more.

Study Methodology

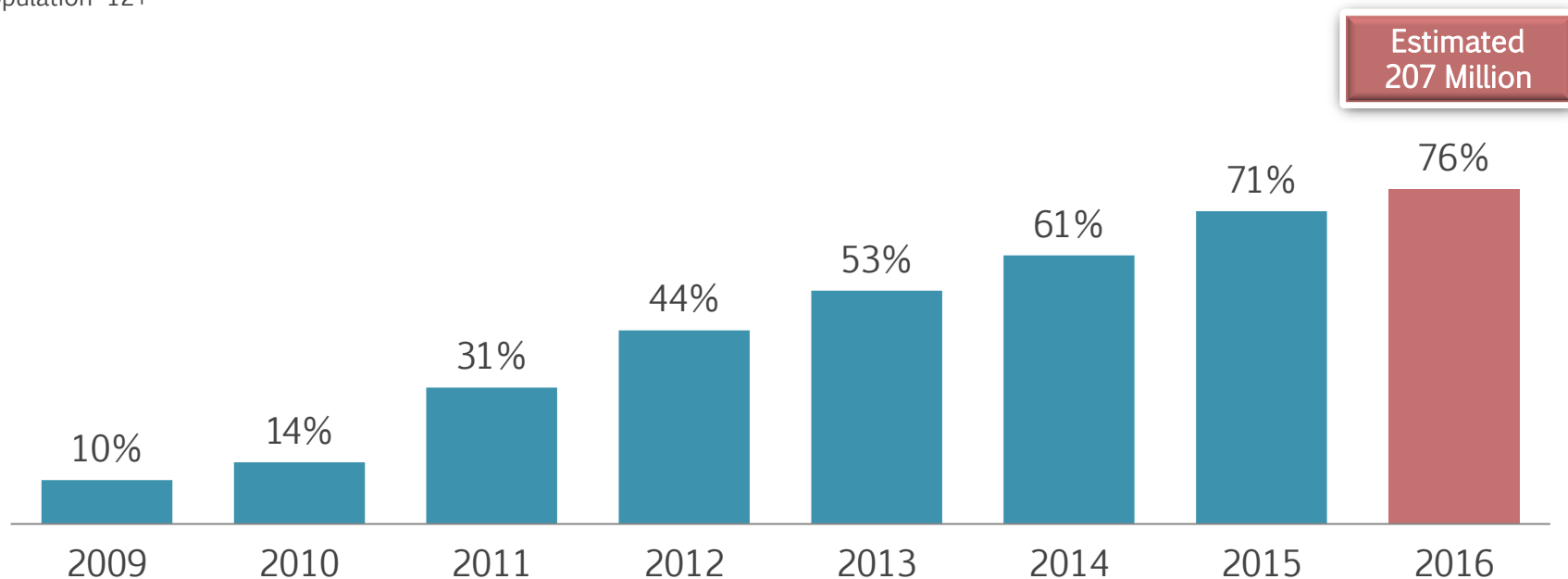
- In January/February 2016, Edison Research conducted a national telephone survey of 2001 people aged 12 and older, using random digit dialing techniques
- Interviews were 52% landline and 48% cell phone
- Survey offered in both English and Spanish languages
- Data weighted to national 12+ population figures



MEDIA & TECHNOLOGY

Smartphone Ownership

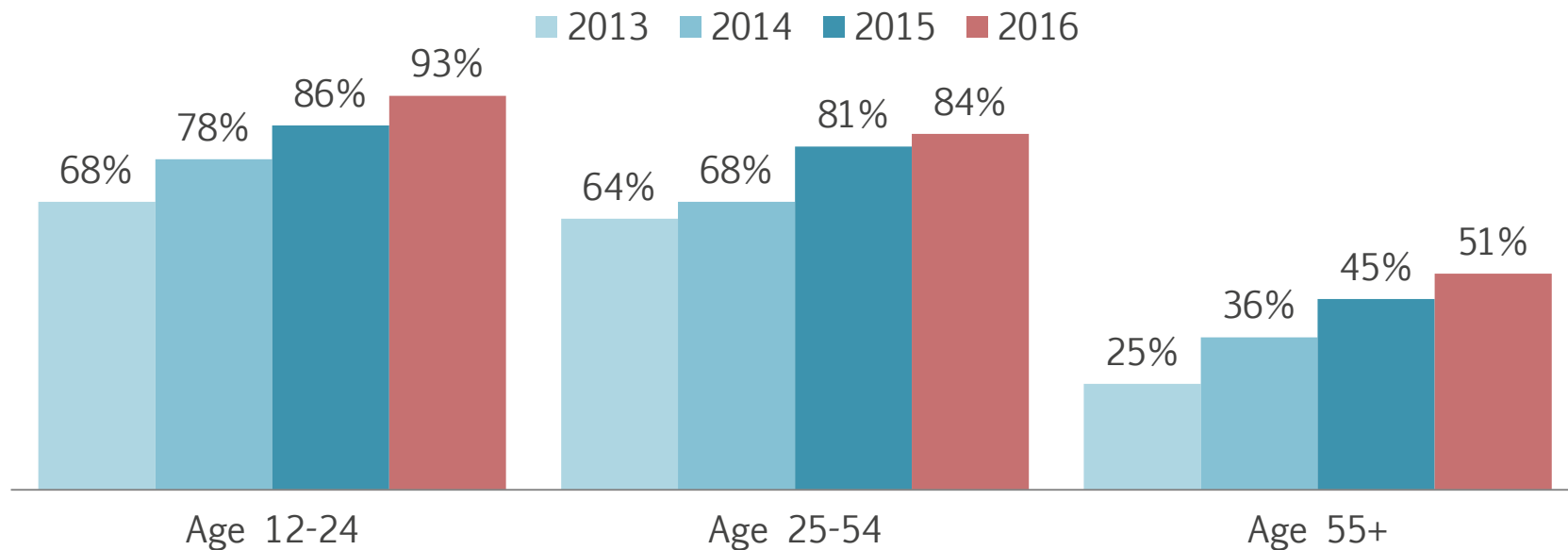
Total Population 12+





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Smartphone Ownership

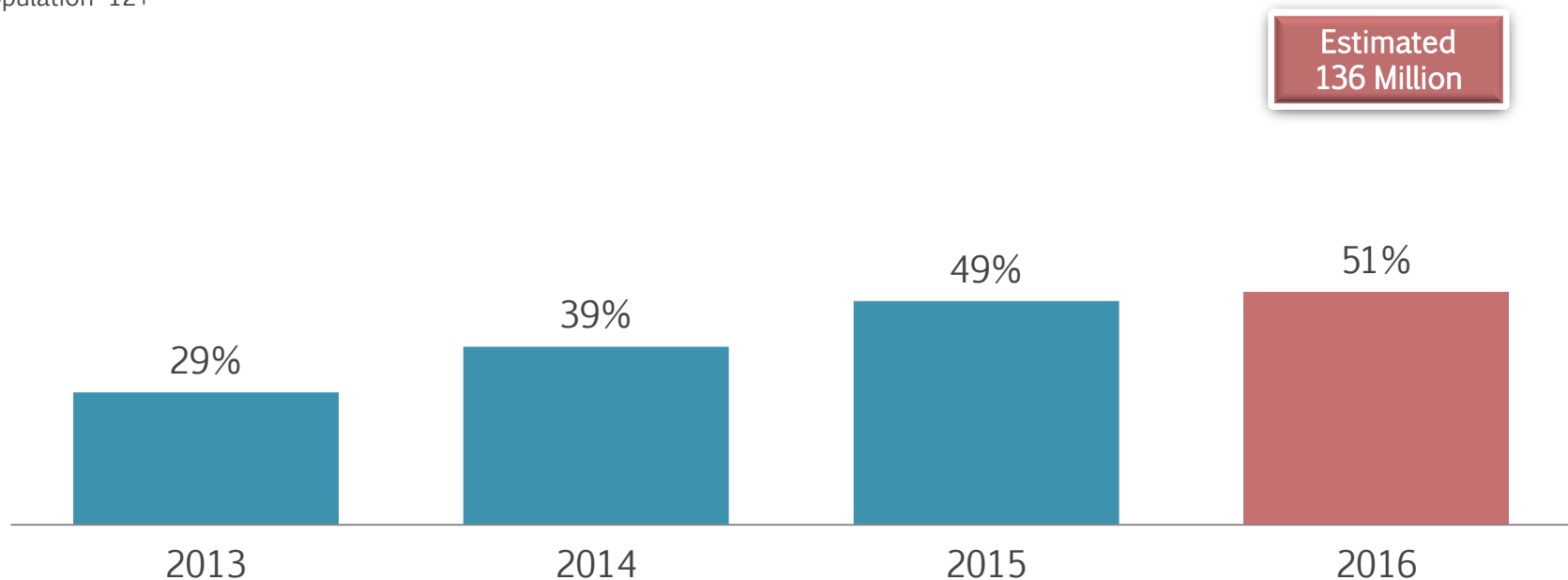


% owning a smartphone



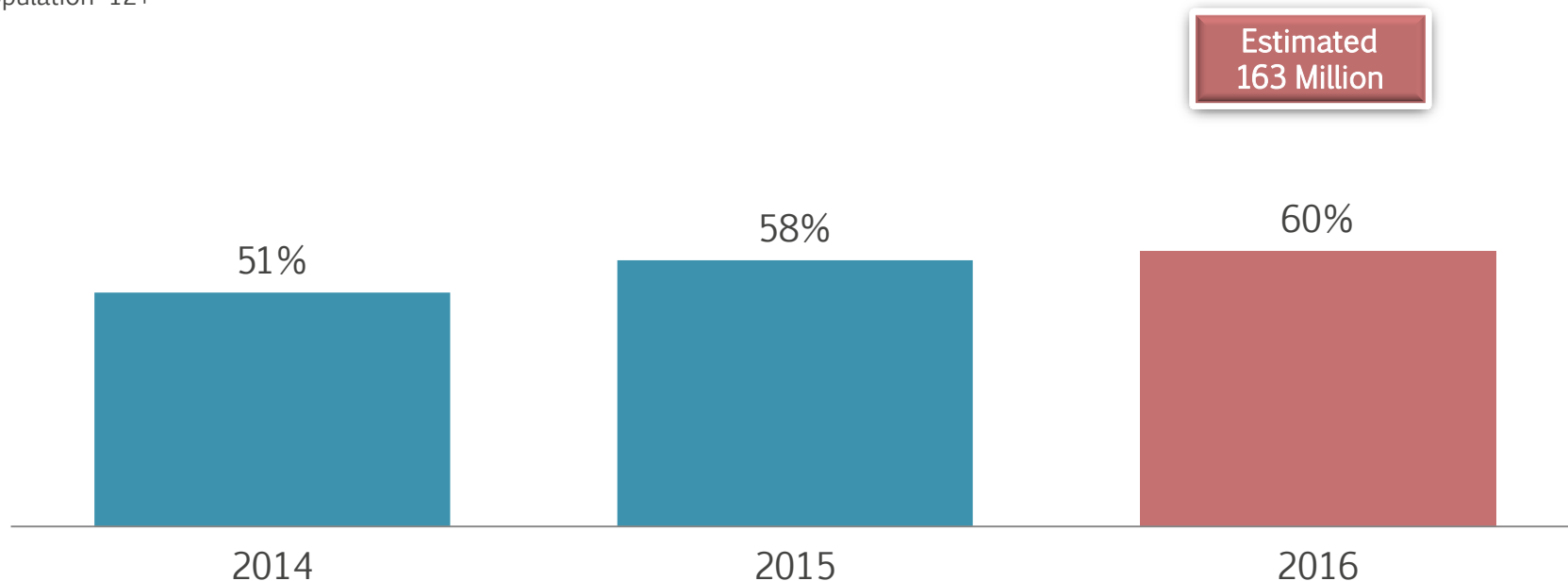
Tablet Ownership

Total Population 12+



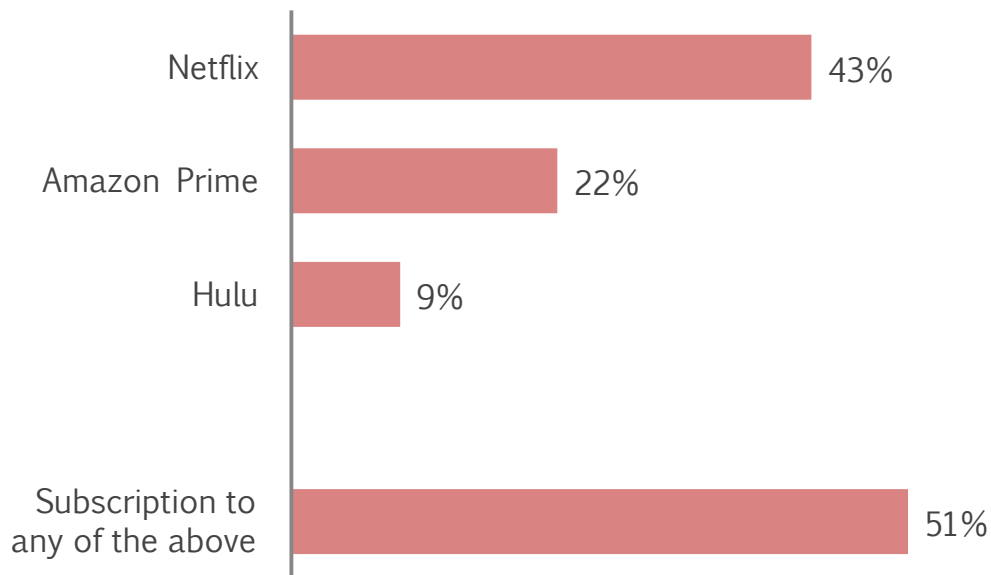
Internet-Connected TV Ownership

Total Population 12+



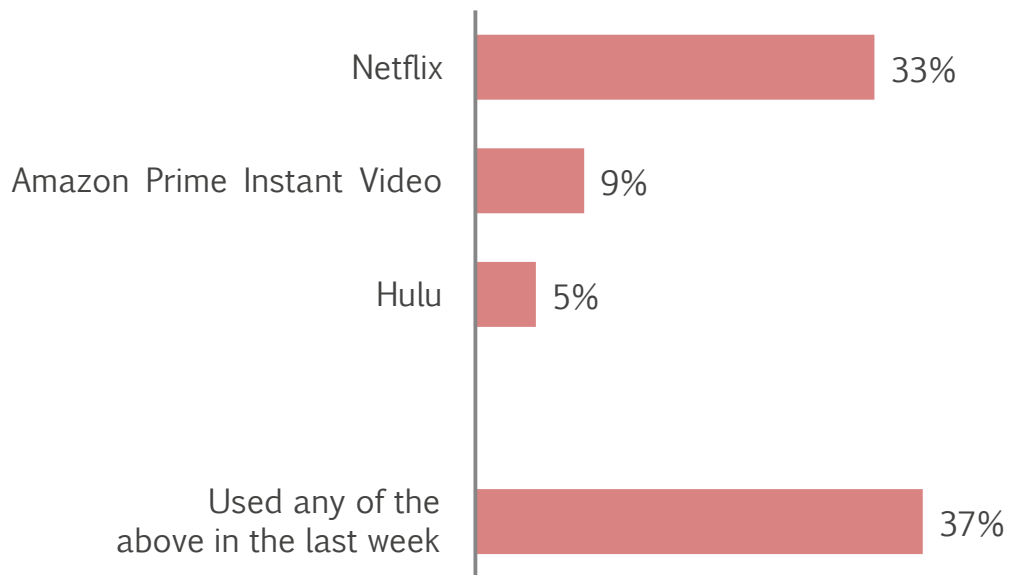
On-Demand Video Service Subscription

Total Population 12+



Used On-Demand Video Service in Last Week

Total Population 12+



% subscribing and using service in last week



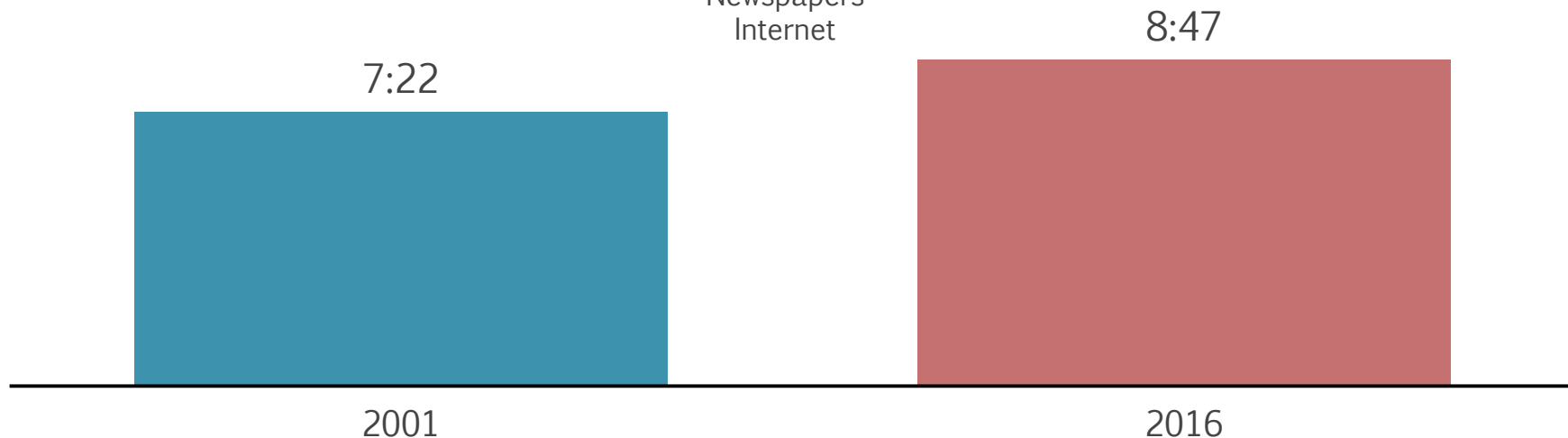
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Total Perceived Time Spent with Media in Past 24 Hours

Total Population 12+

Sum of self-reported time spent with:

Television
Radio
Newspapers
Internet



2001

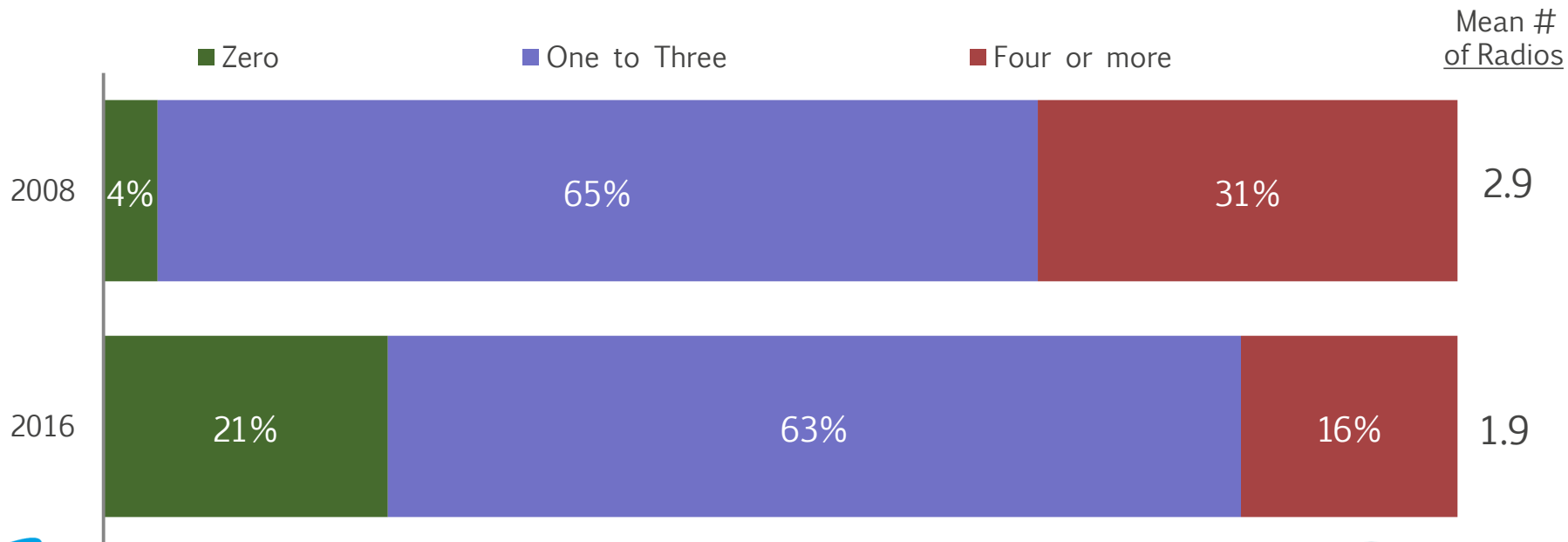
2016

Hours:Minutes

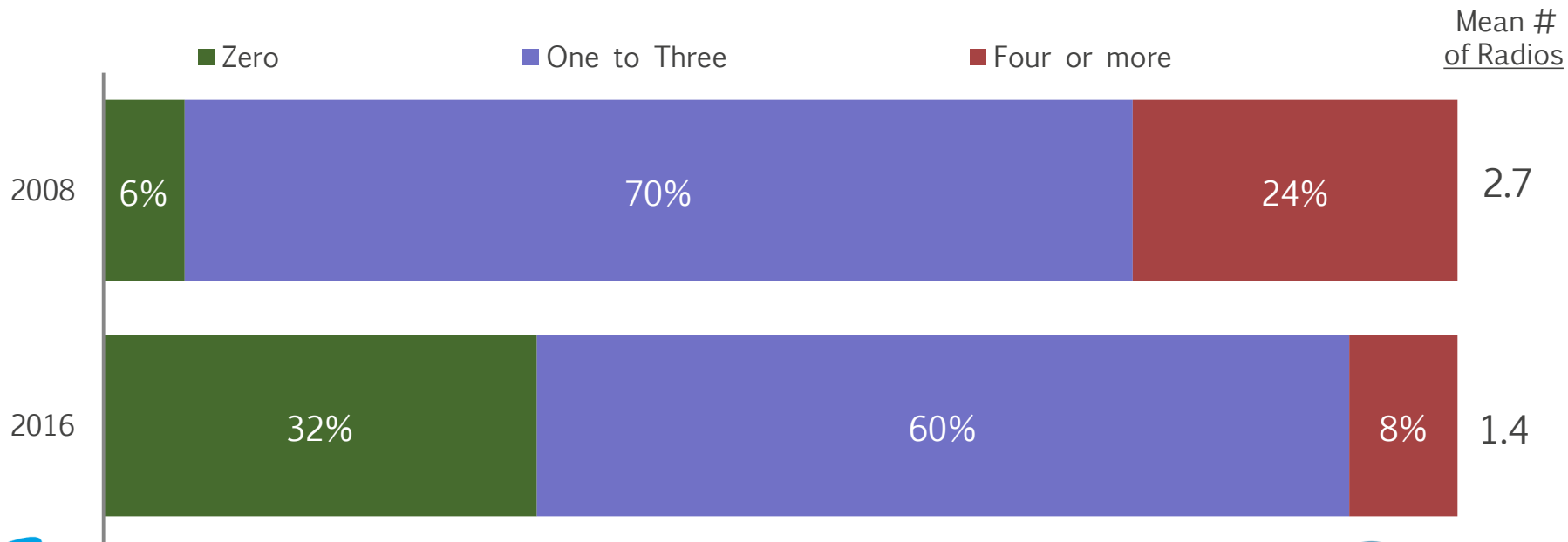


Number of Radios Owned in Home

Total Population 12+



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

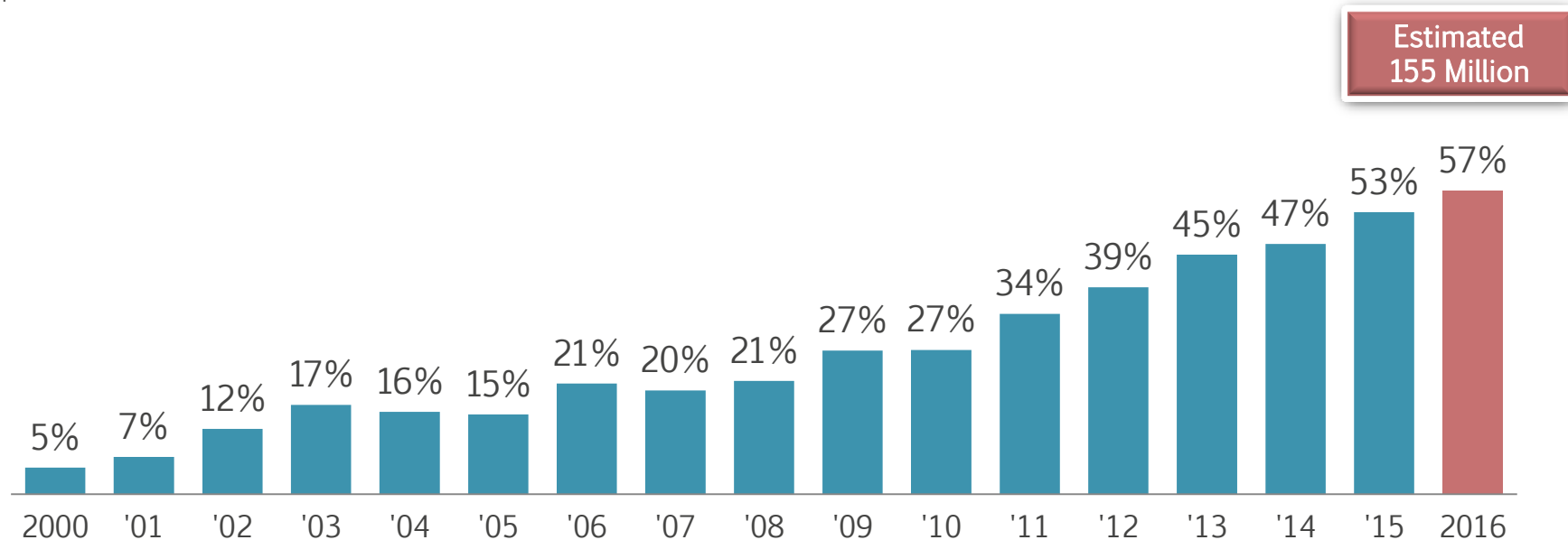




ONLINE RADIO

Monthly Online Radio Listening

Total Population 12+

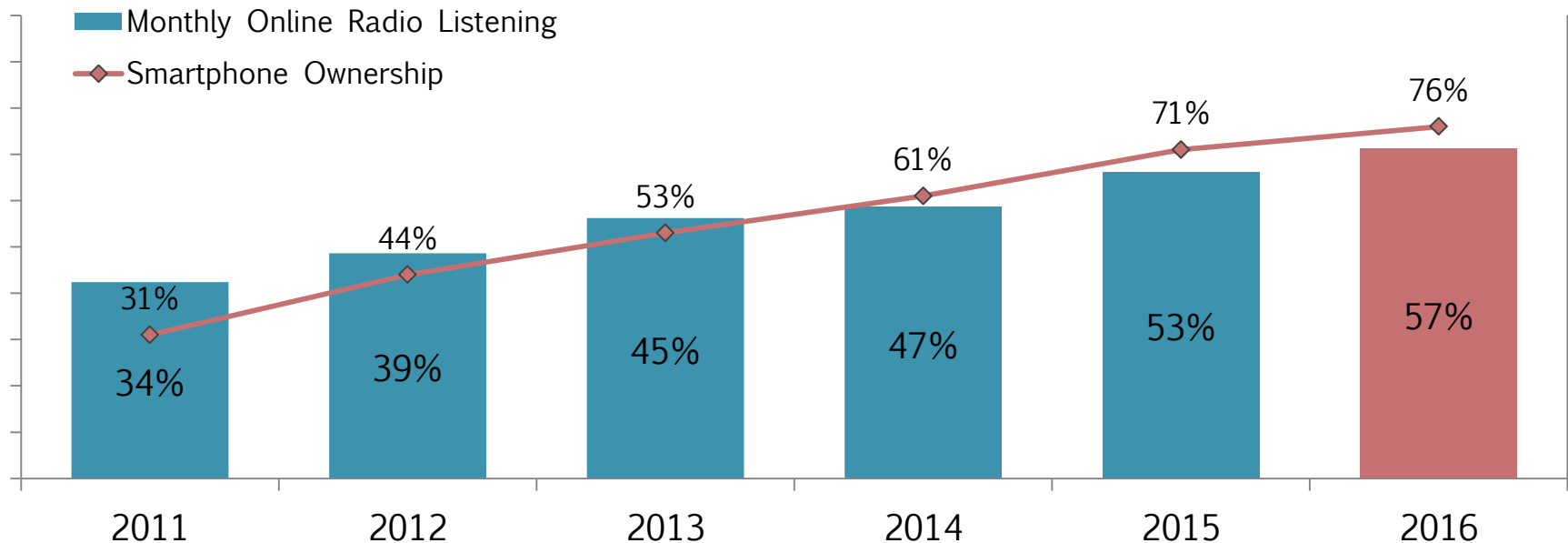




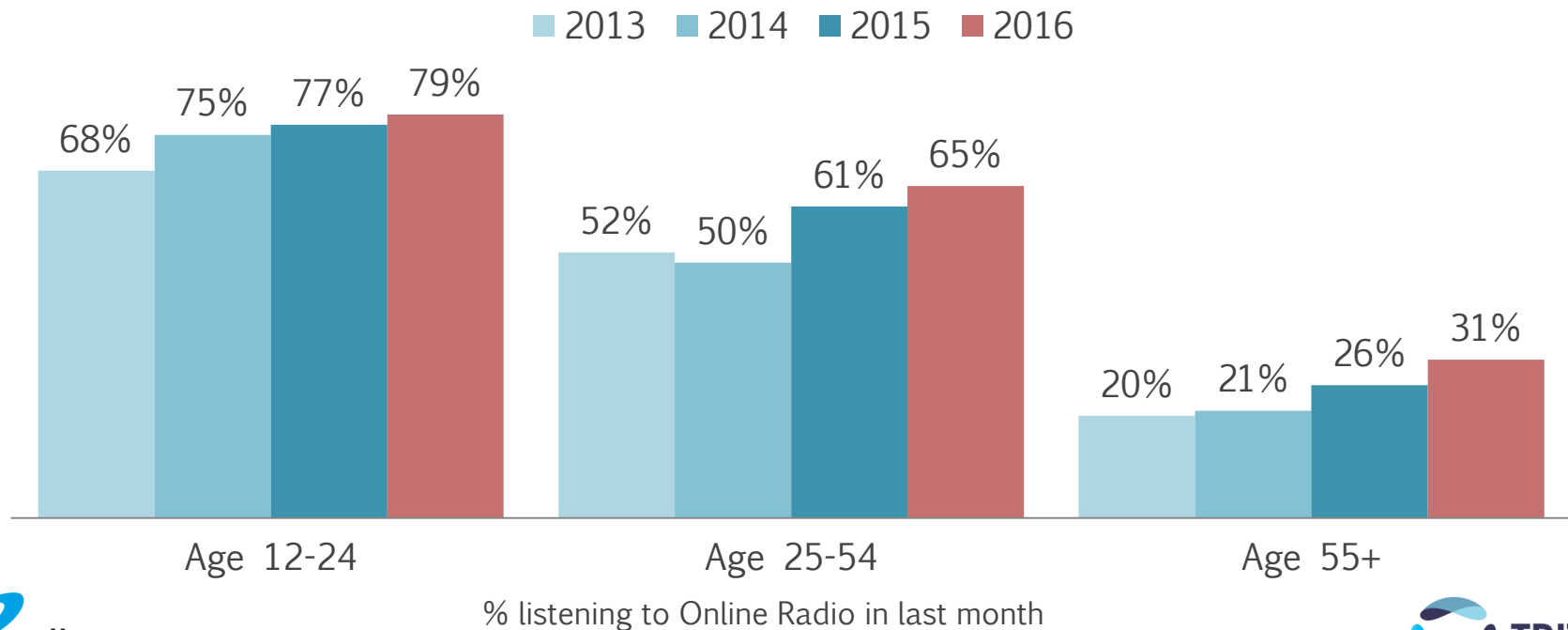
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Relationship Between Monthly Online Radio Listening and Smartphone Ownership

Total Population 12+



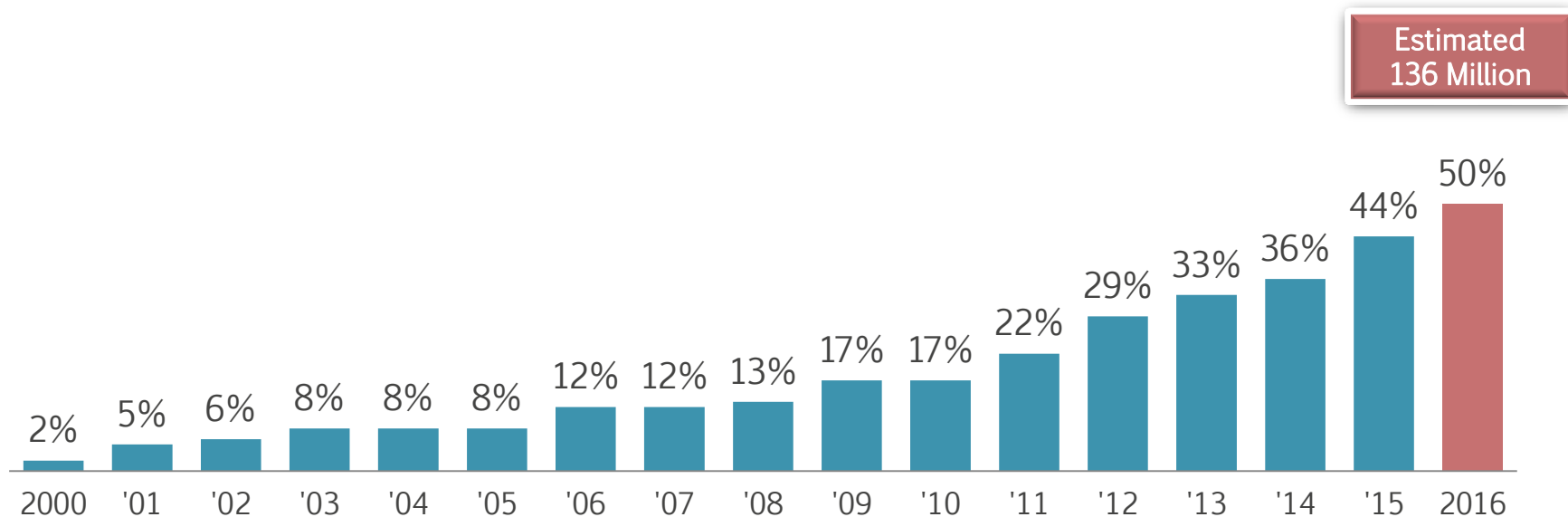
Monthly Online Radio Listening



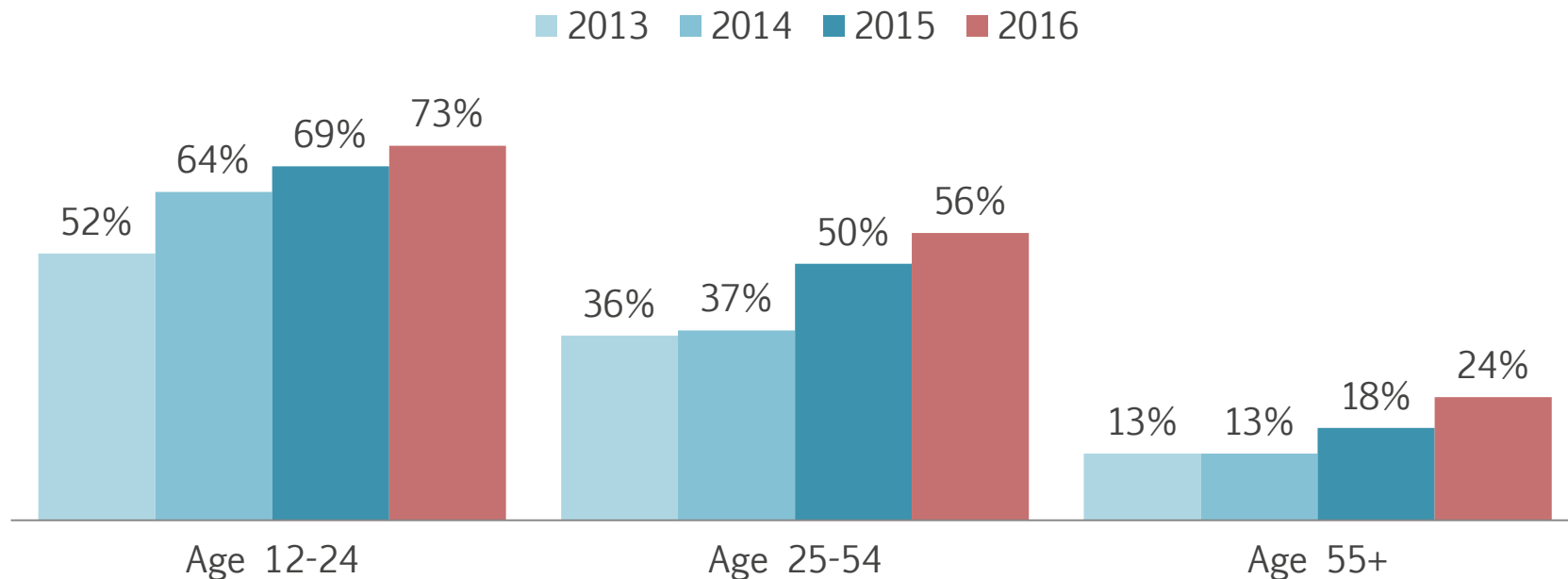
Online Radio = Listening to AM/FM radio stations online and/or listening to streamed audio content available only on the Internet

Weekly Online Radio Listening

Total Population 12+



Weekly Online Radio Listening



% listening to Online Radio in last week

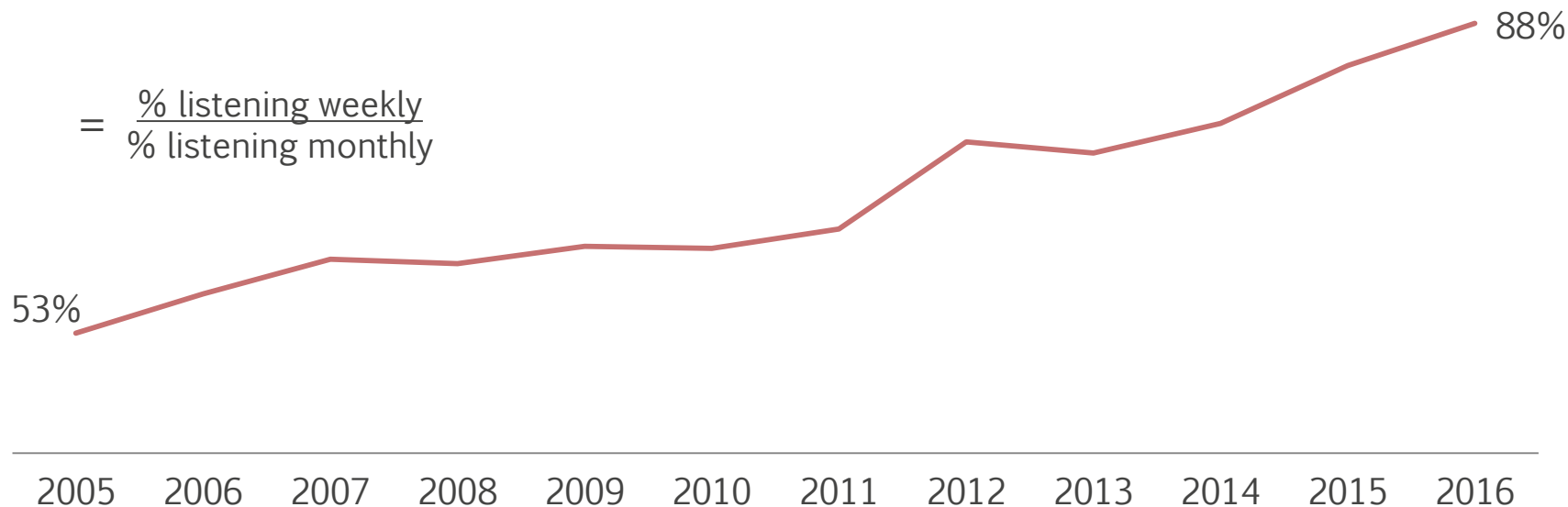
Online Radio = Listening to AM/FM radio stations online and/or listening to streamed audio content available only on the Internet



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Portion of Online Radio Monthly Listeners Who Also Listen Weekly

Total Population 12+

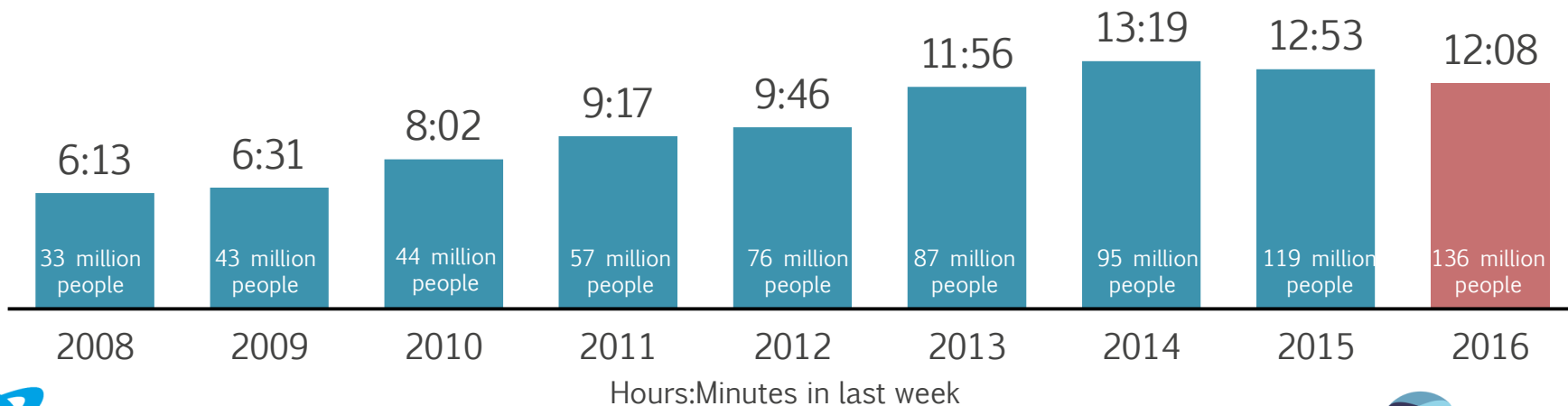


Online Radio = Listening to AM/FM radio stations online and/or listening to streamed audio content available only on the Internet



Average Time “Weekly Online Radio Listeners” Spend Listening to Online Radio

Base: Weekly Online Radio Listeners



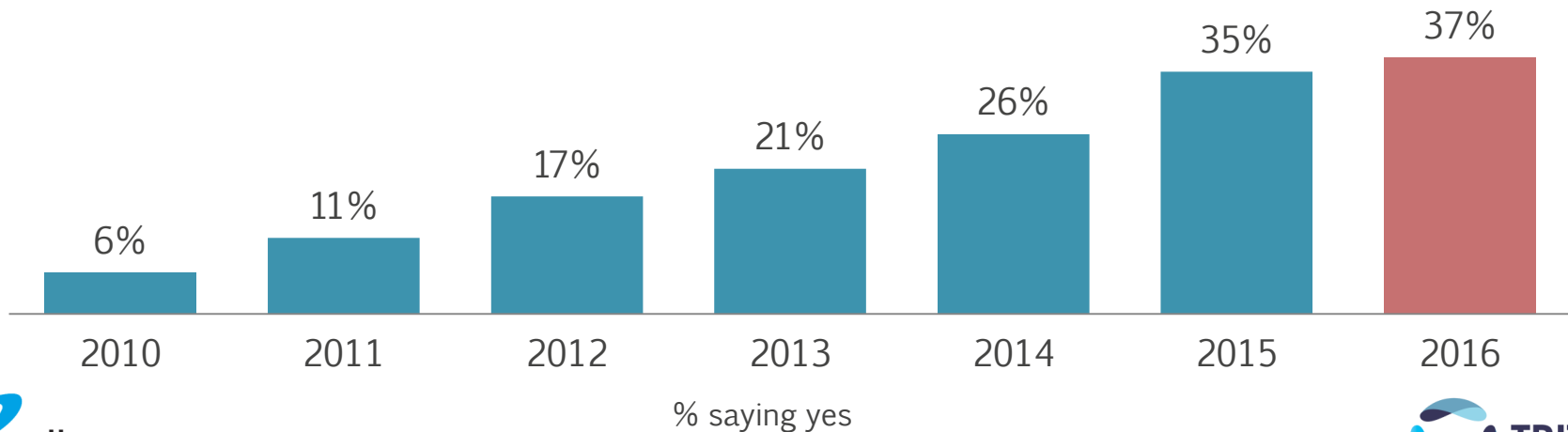


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Online Radio Listening in Car

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

Base: Own a cell phone; 93%





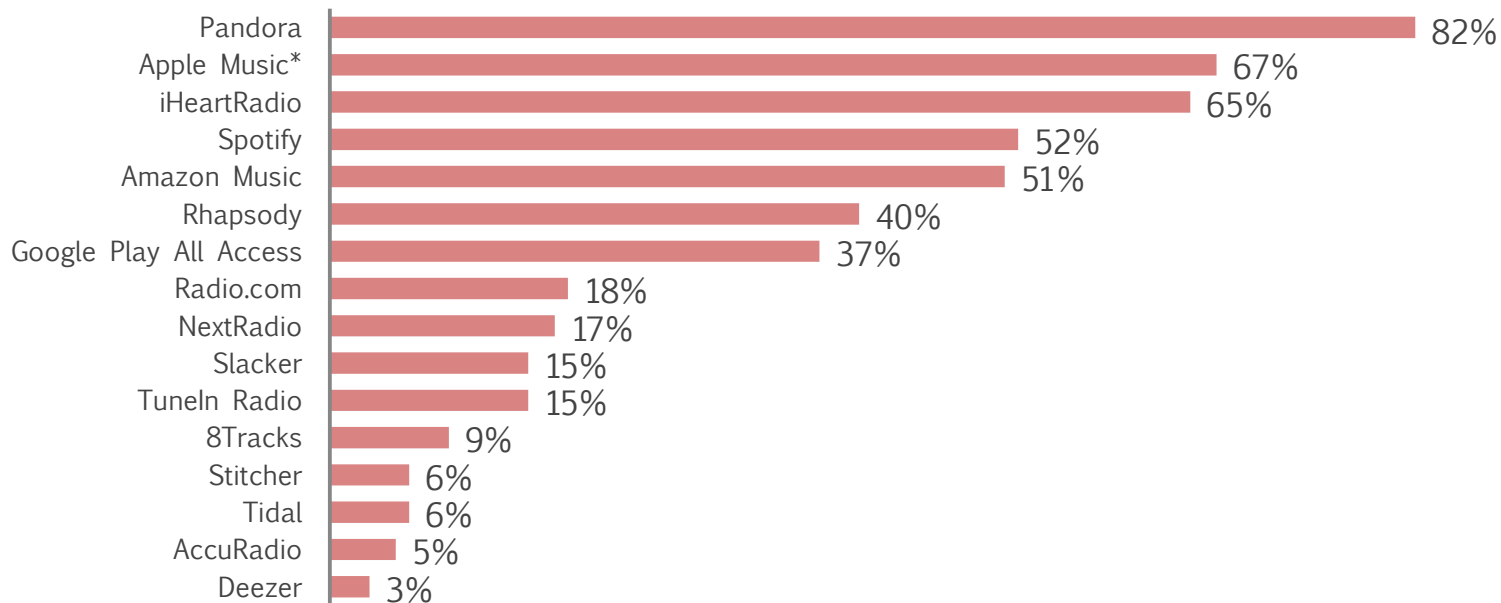
AUDIO BRANDS



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Audio Brand Awareness

Total Population 12+



*Asked as "Apple Music, formerly known as iTunes Radio"

% aware of audio brand

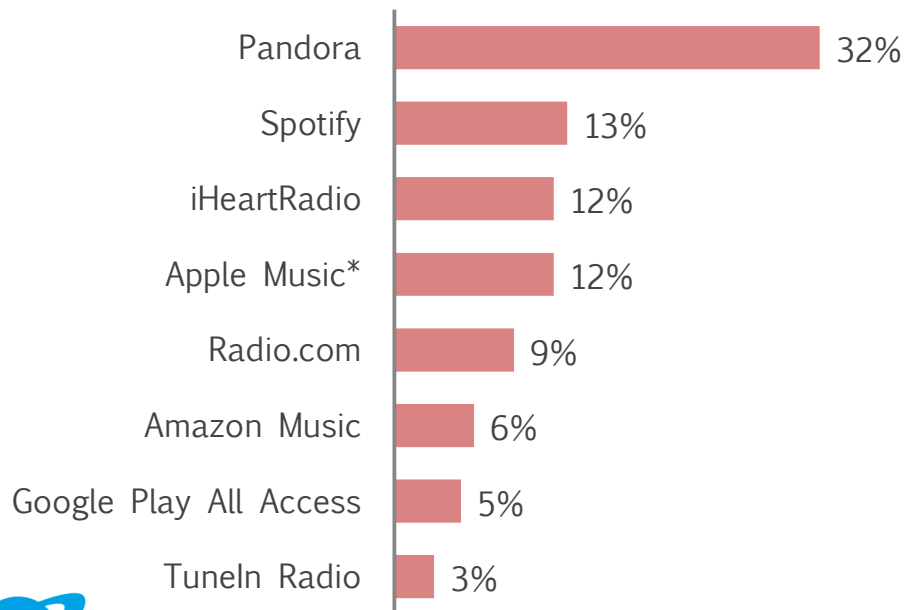




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Listened in the last month to...

Total Population 12+



Brands lower than 3% Age 12+ not shown

*Asked as "Apple Music, formerly known as iTunes Radio"

% listened in last month

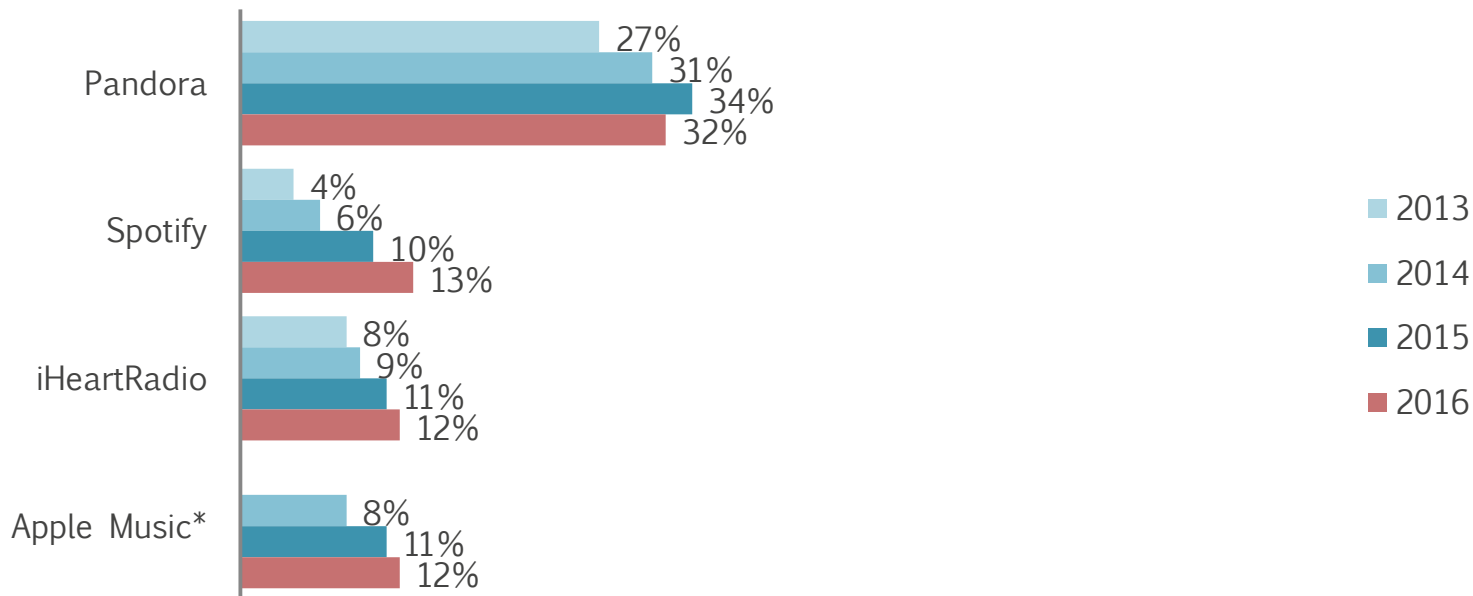




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Listened in the last month to...

Total Population 12+

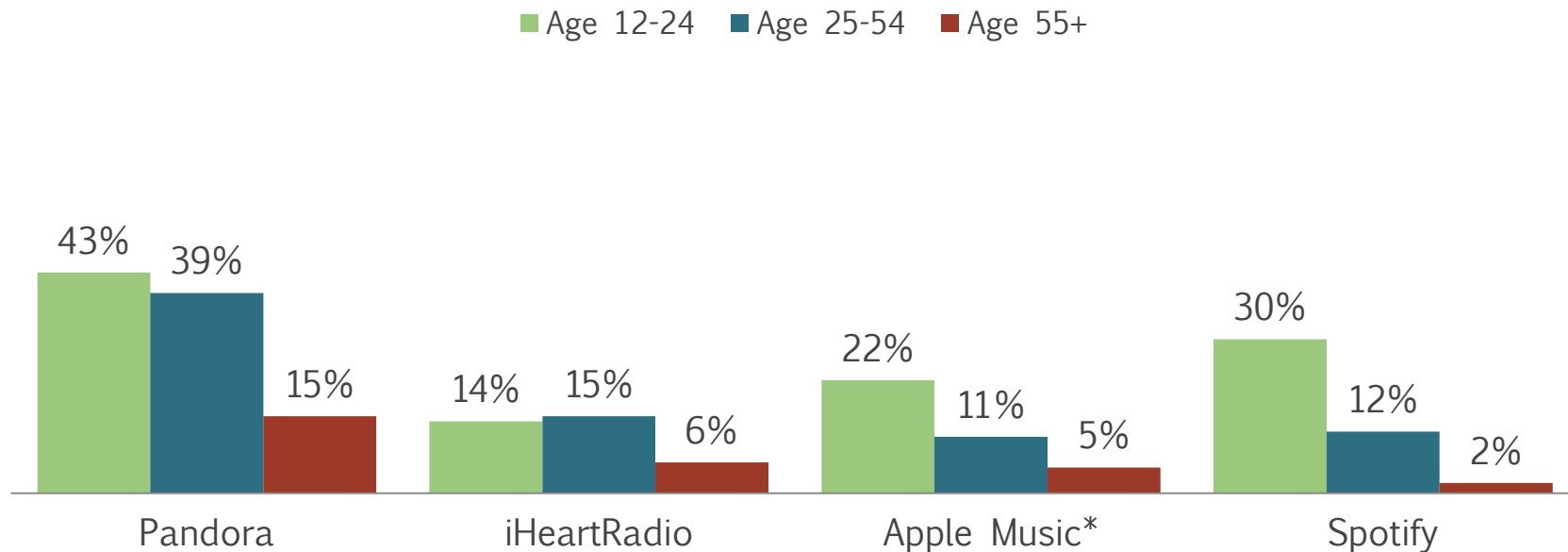


*2014-2015: Asked as "iTunes Radio"
2016: "Asked as Apple Music, formerly known as iTunes Radio"

% listened in last month



Listened in the last month to...

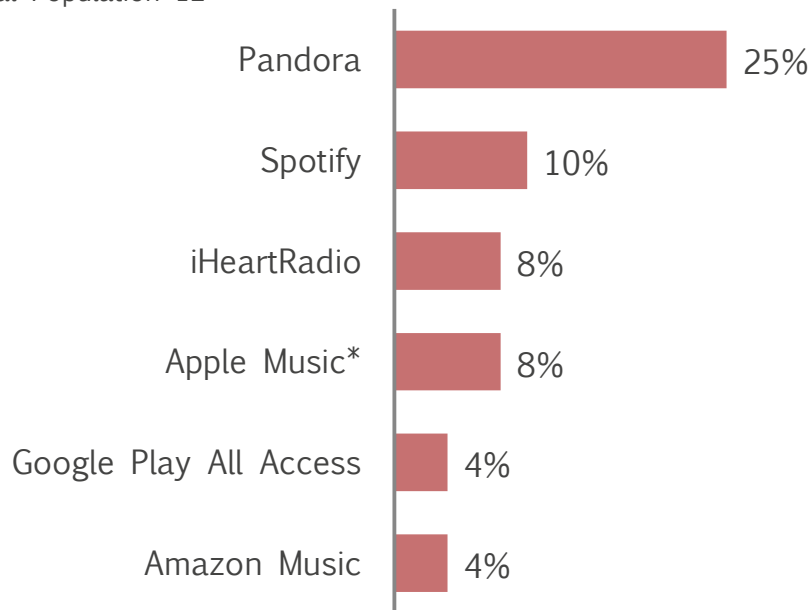


*Asked as "Apple Music, formerly known as iTunes Radio"

% listened in last month

Listened in the last week to...

Total Population 12+



Brands lower than 4% Age 12+ not shown

*Asked as "Apple Music, formerly known as iTunes Radio"

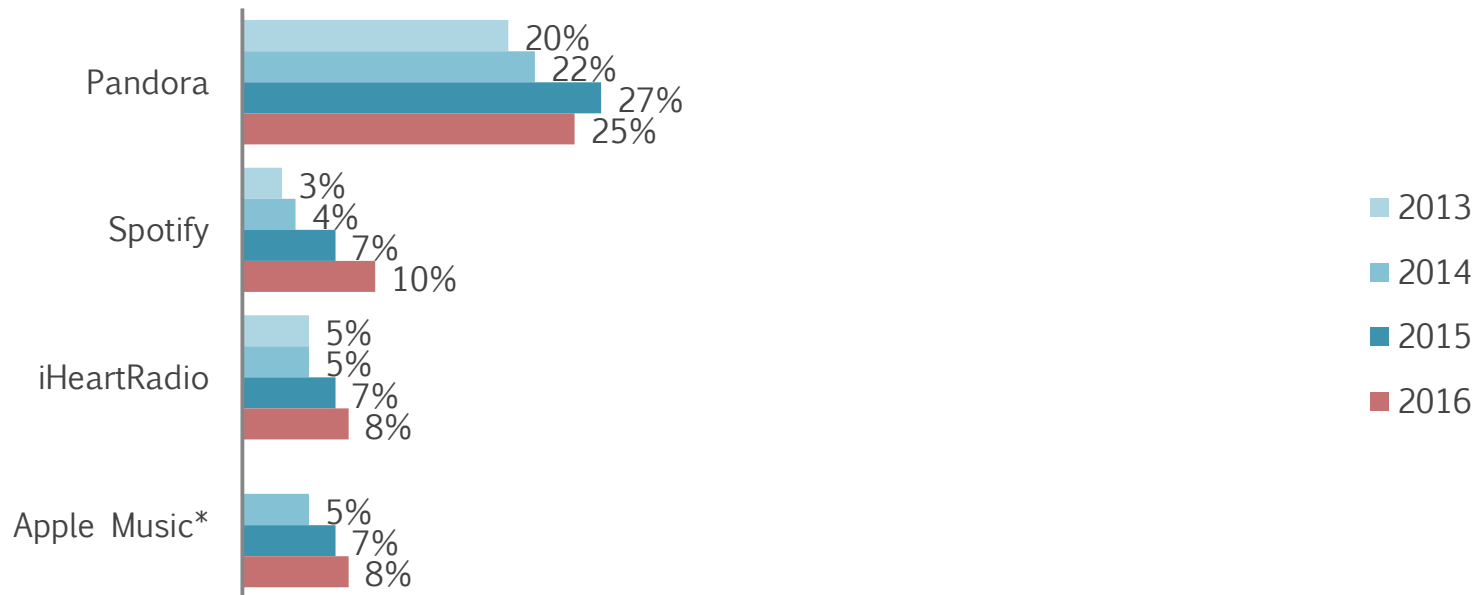
% listened in last week



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Listened in the last week to...

Total Population 12+



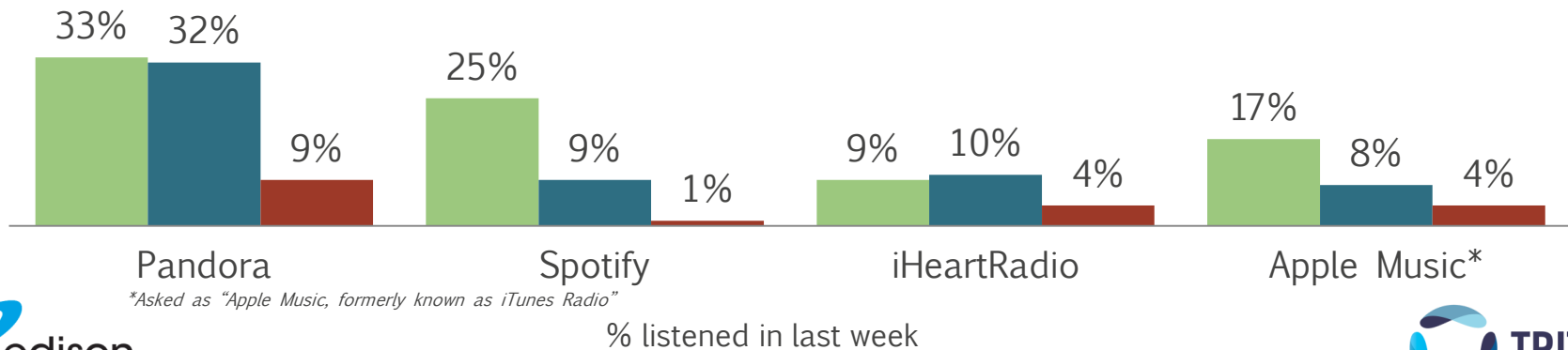
*2014-15: Asked as "iTunes Radio"
2016: "Asked as Apple Music, formerly known as iTunes Radio"

% listened in last week



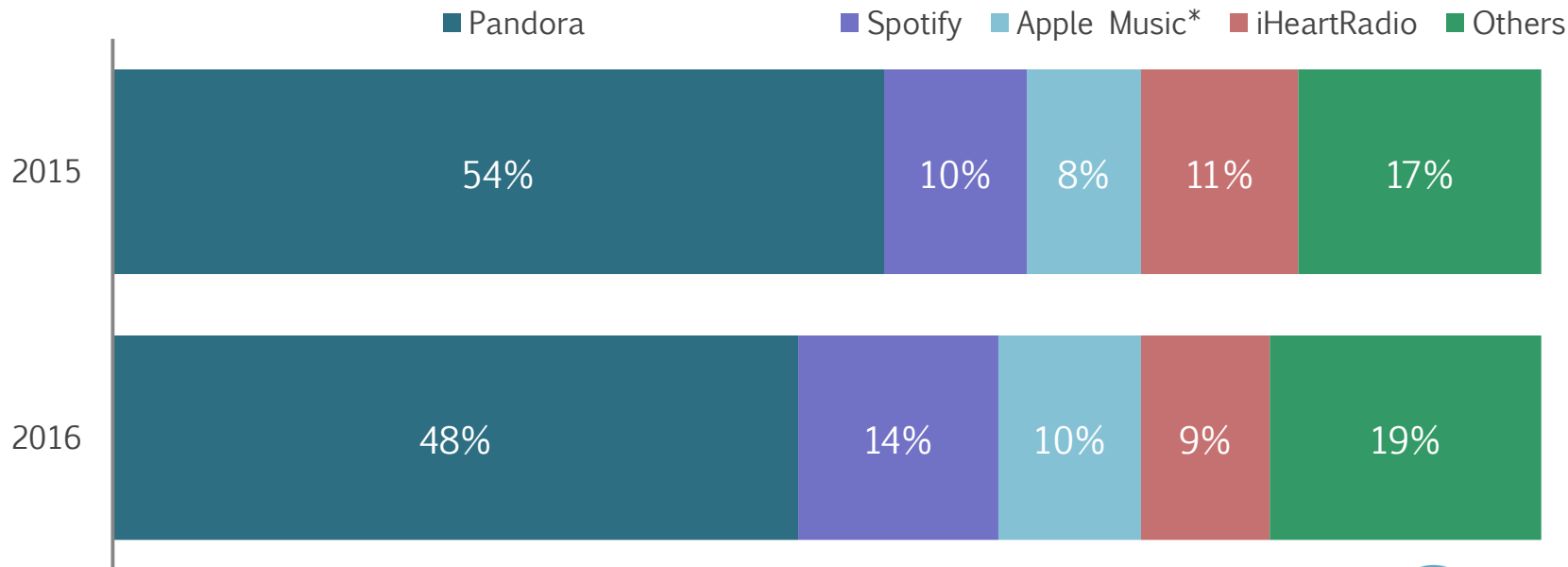
Listened in the last week to...

■ Age 12-24 ■ Age 25-54 ■ Age 55+



Audio Brand Used Most Often

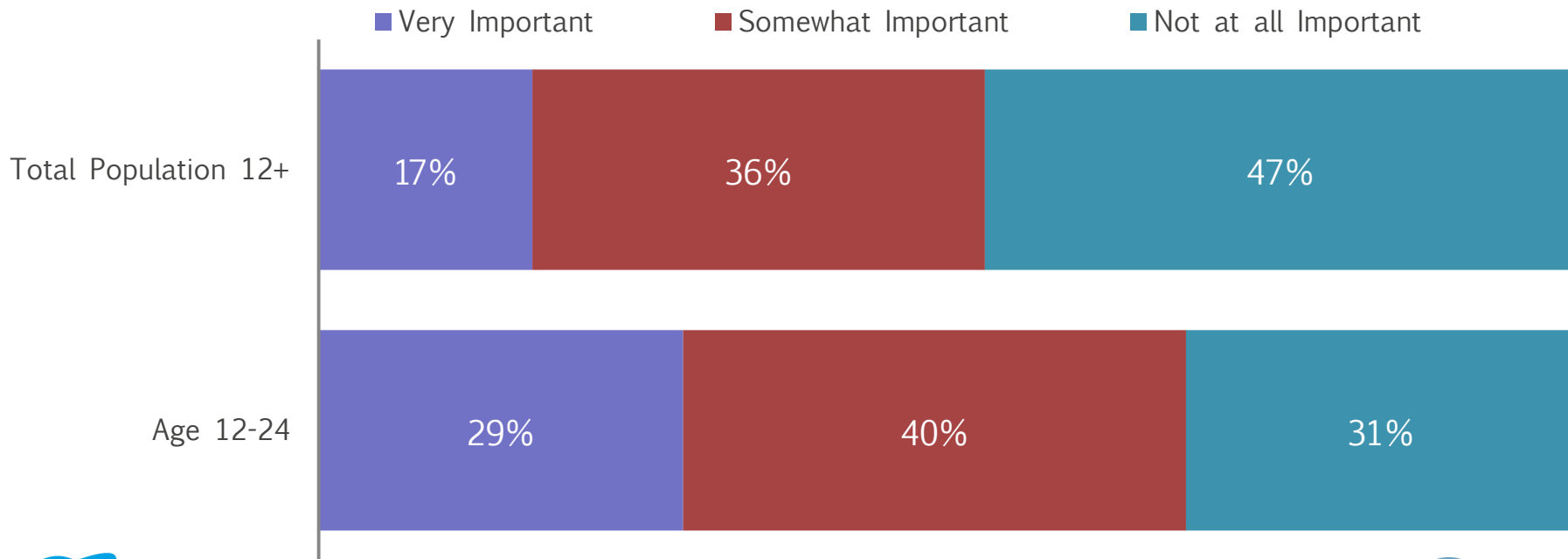
Base: Currently ever use any audio brand





MUSIC DISCOVERY

Importance of Keeping Up-To-Date with Music

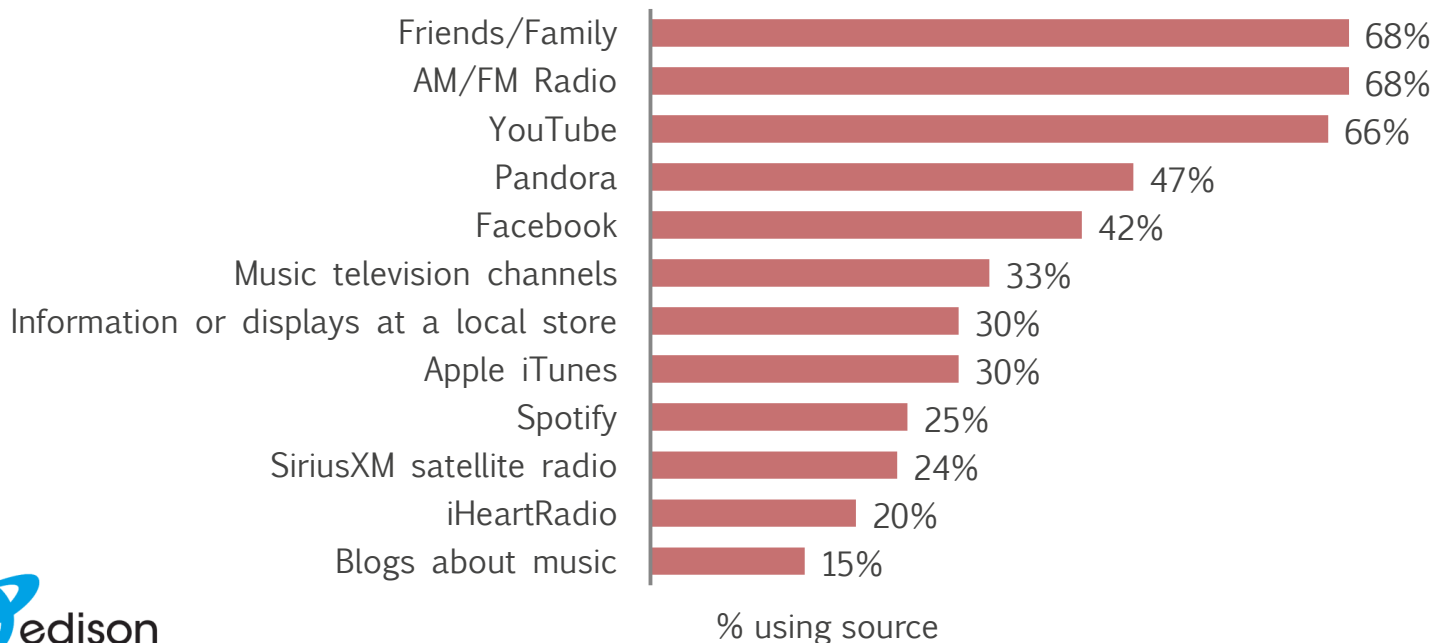




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Sources Used for Keeping Up-to-Date with Music

Base: Those saying it is “Very Important” or “Somewhat Important” to keep up-to-date with music

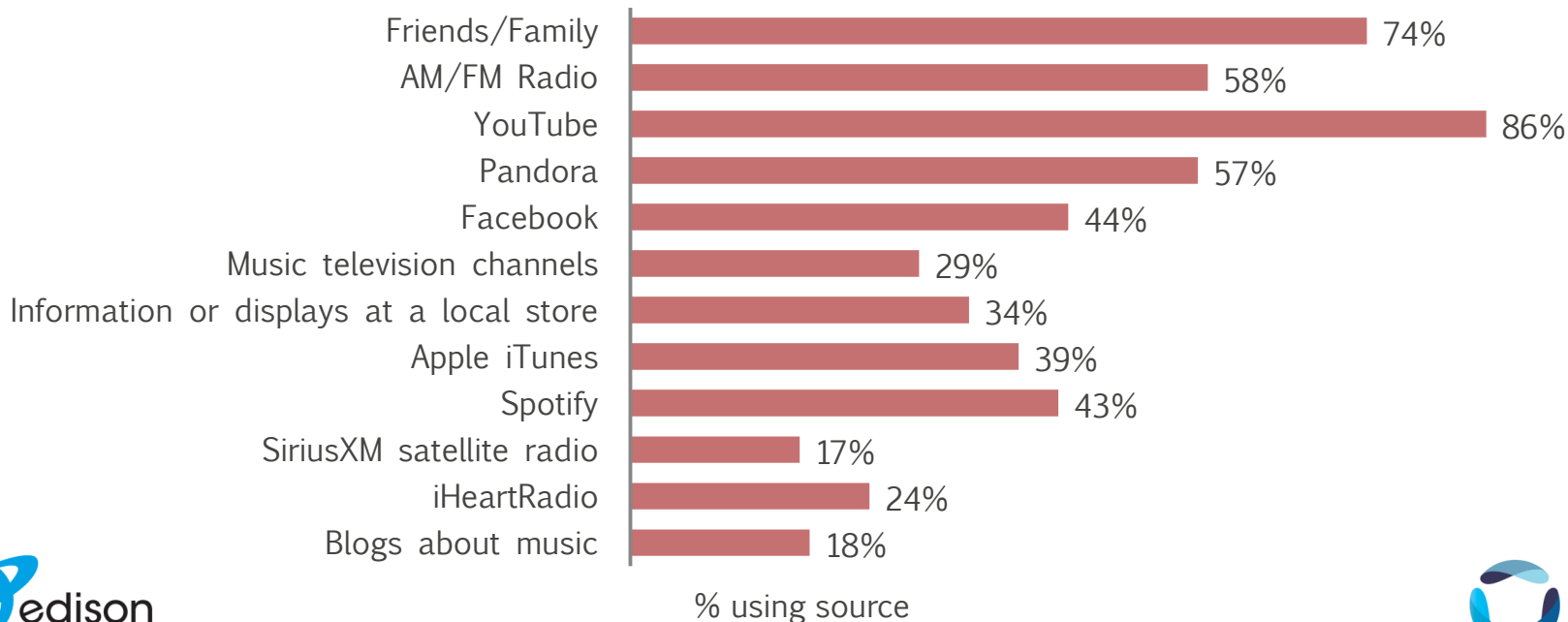




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Sources Used for Keeping Up-to-Date with Music (Age 12-24)

Base: Those saying it is "Very Important" or "Somewhat Important" to keep up-to-date with music

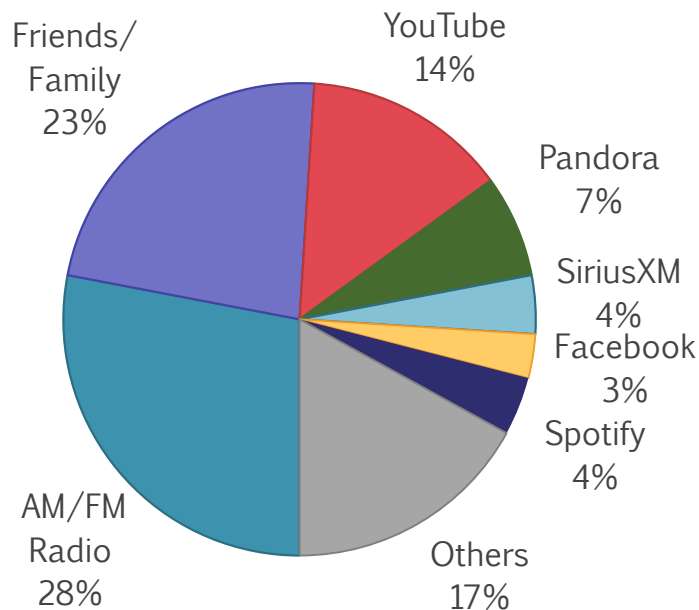




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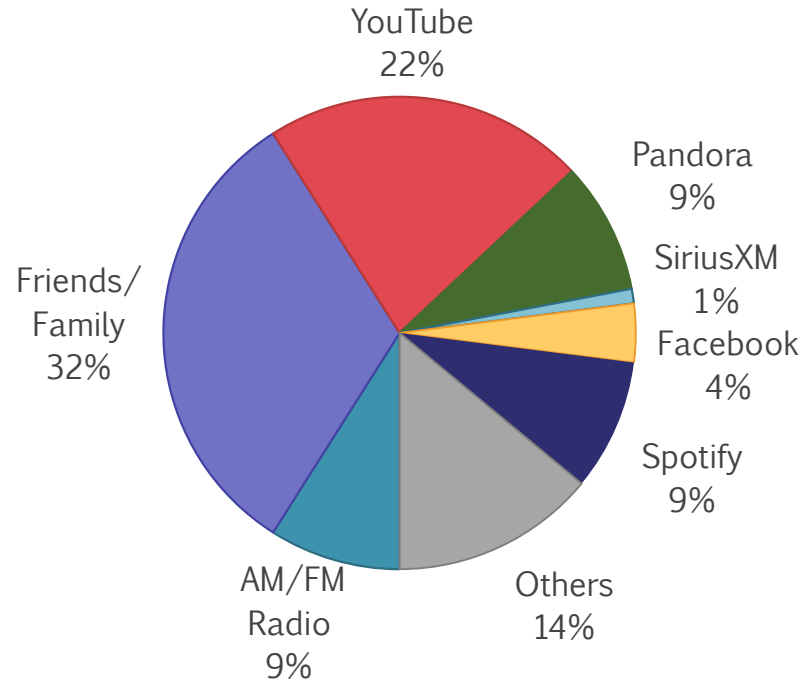
Source Used Most Often for Keeping Up-to-Date with Music

Base: Those saying it is "Very Important" or "Somewhat Important" to keep up-to-date with music



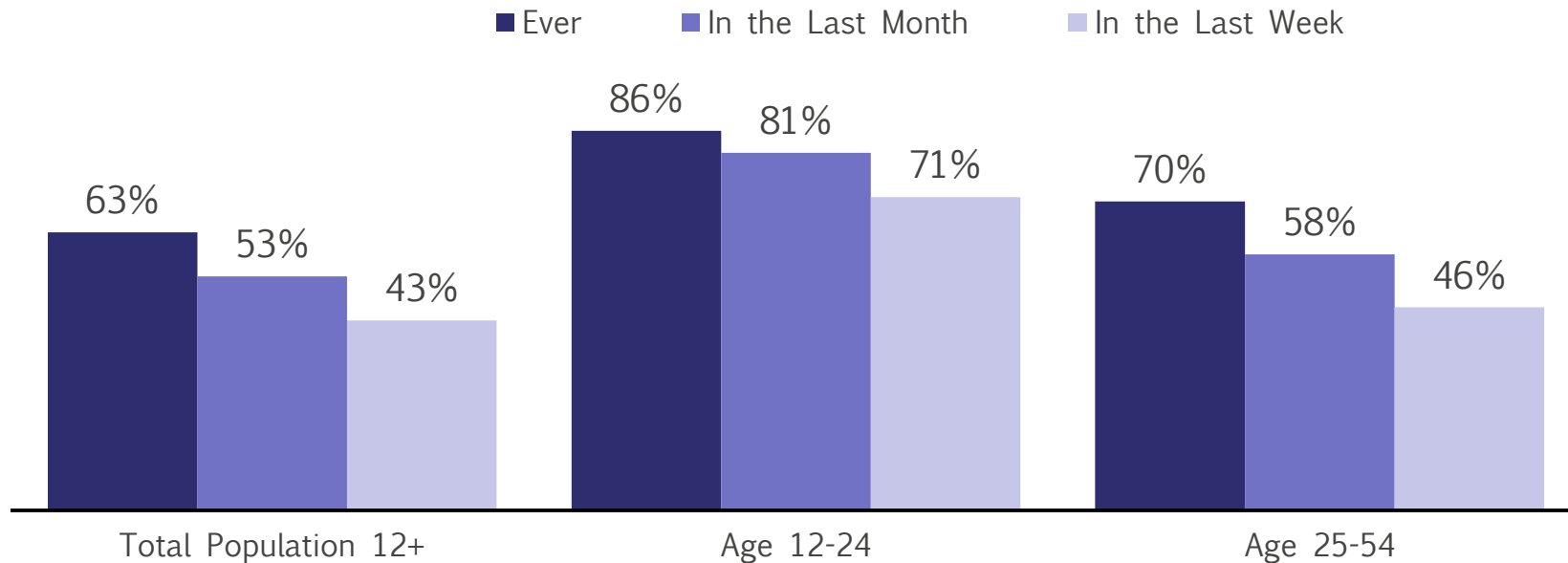
Source Used Most Often for Keeping Up-to-Date with Music (Age 12-24)

Base: Those saying it is “Very Important” or “Somewhat Important” to keep up-to-date with music



YouTube Usage

“Have you used YouTube to watch music videos or listen to music...?”



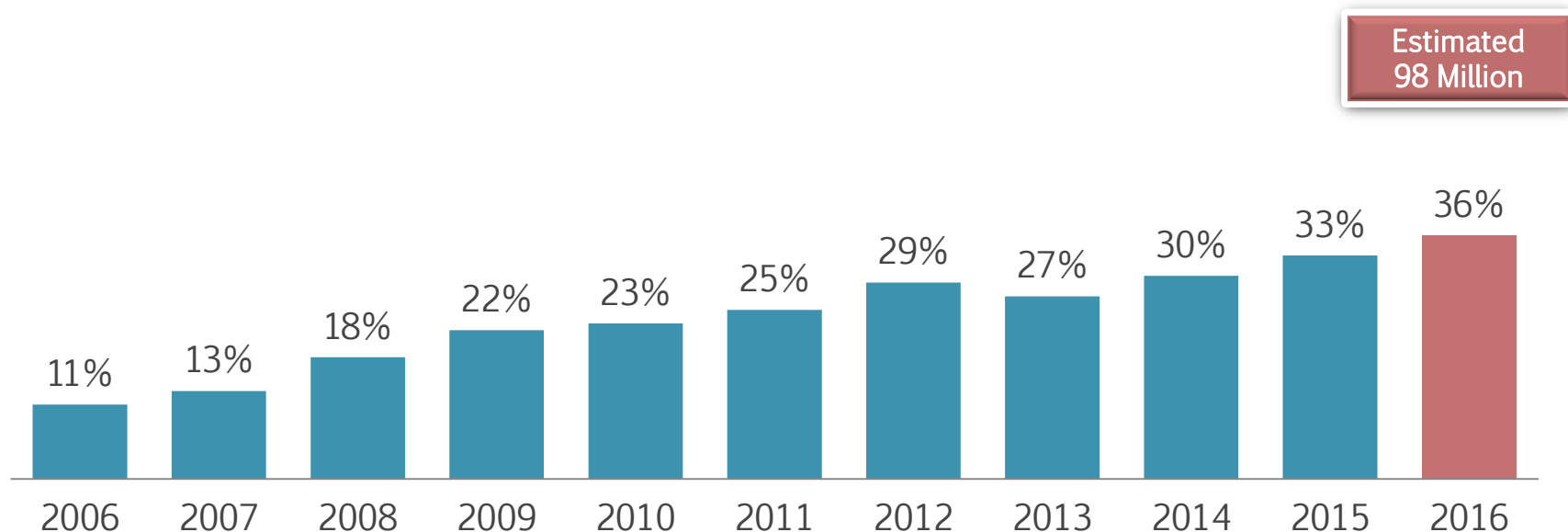
% saying yes



PODCASTING

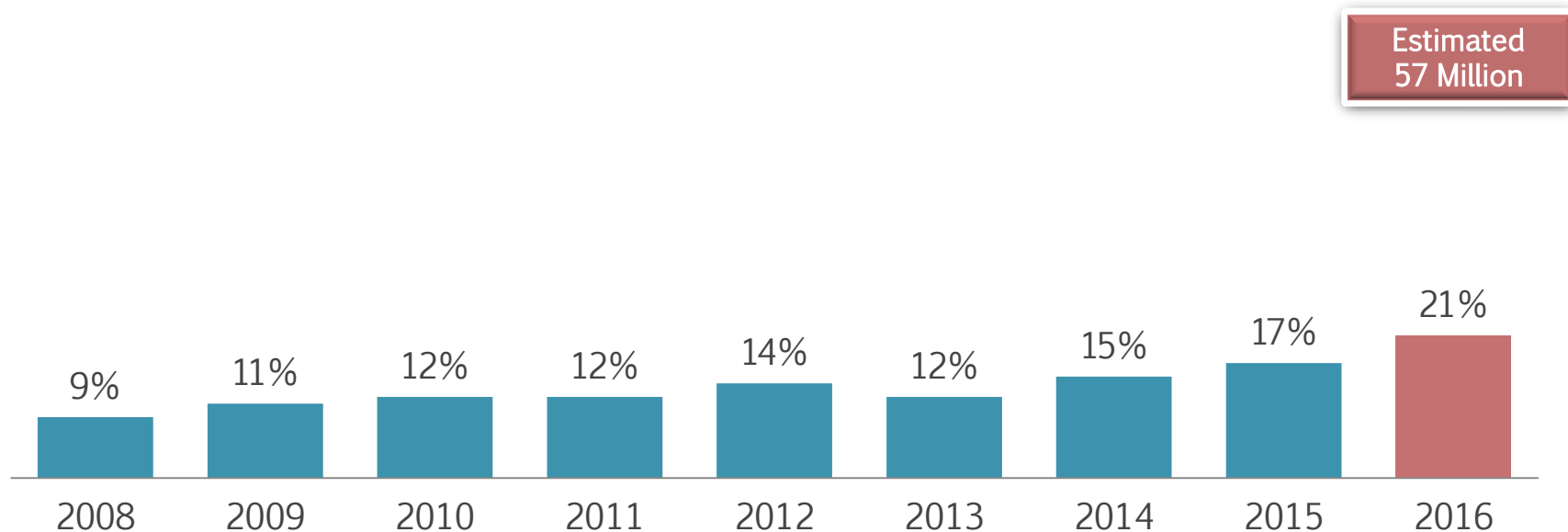
Podcast Listening

Total Population 12+

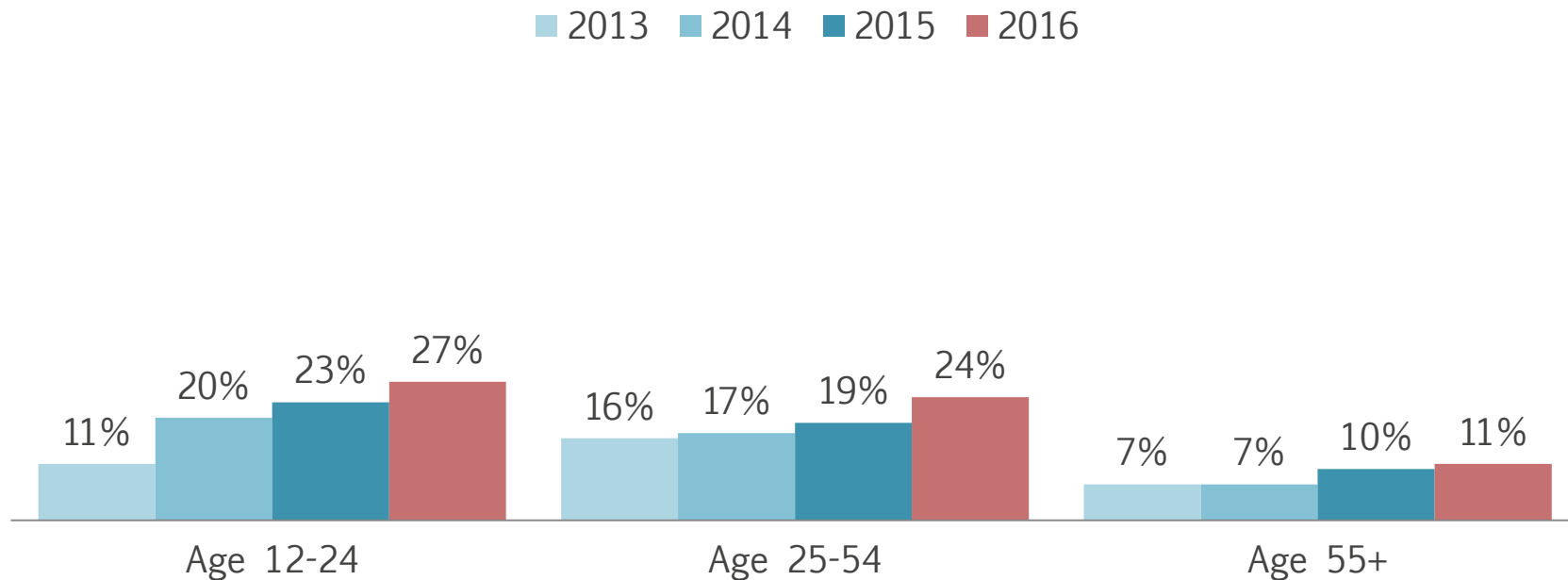


Monthly Podcast Listening

Total Population 12+

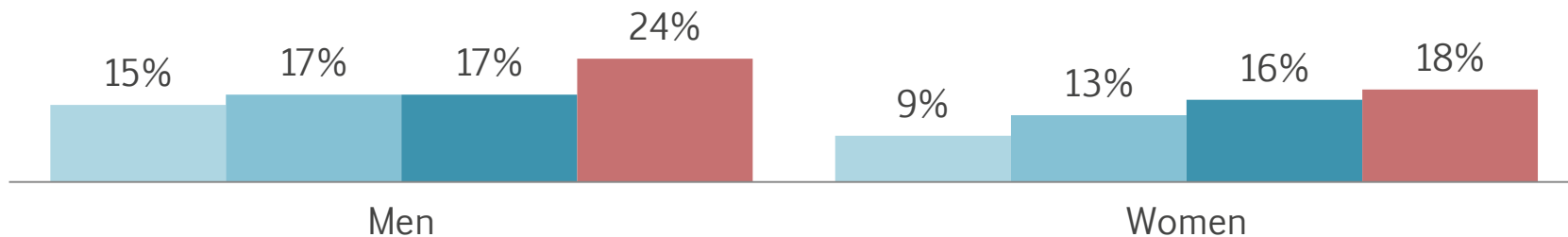


Monthly Podcast Listening



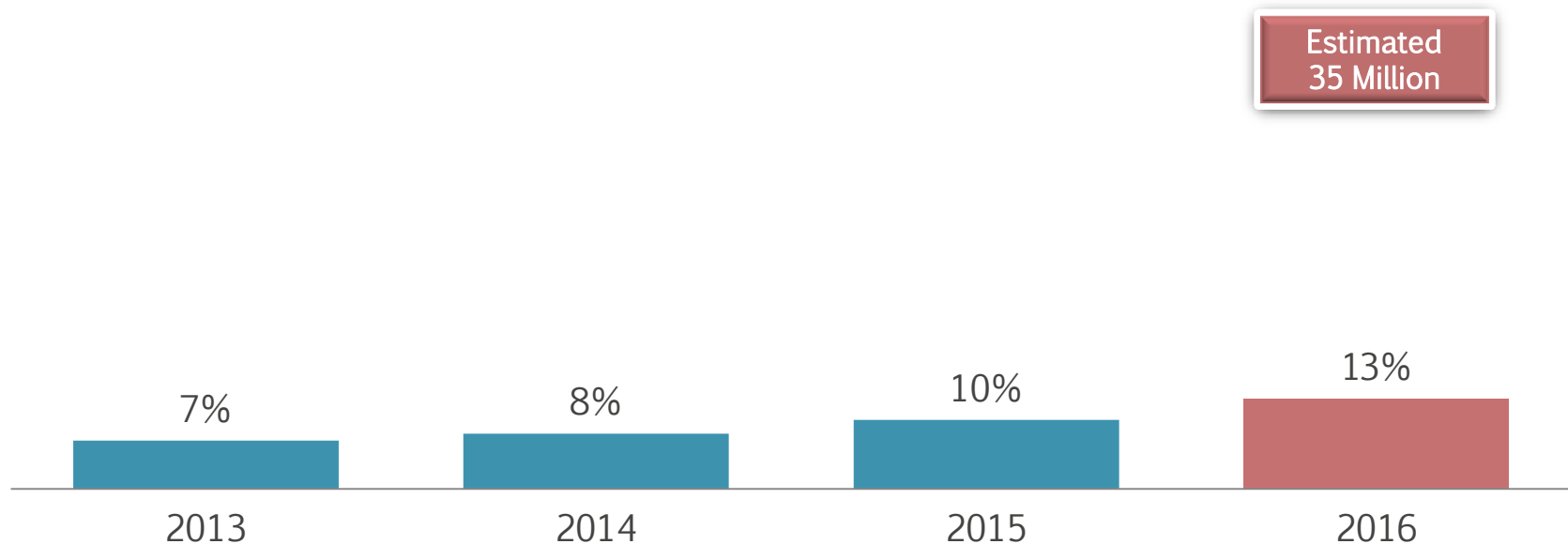
Monthly Podcast Listening

■ 2013 ■ 2014 ■ 2015 ■ 2016



Weekly Podcast Listening

Total Population 12+

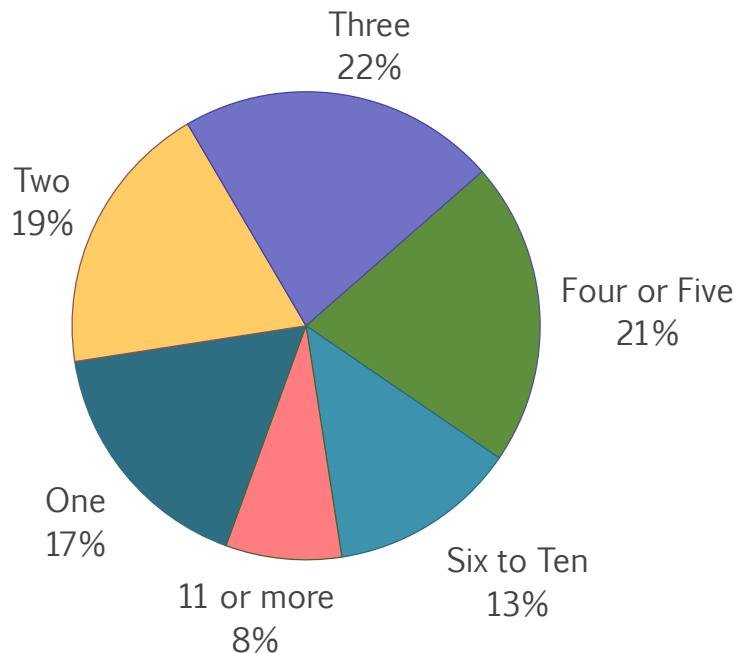




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Number of Podcasts Listened to in Last Week

Base: Weekly Podcast Listeners



Average of five
podcasts listened
per week

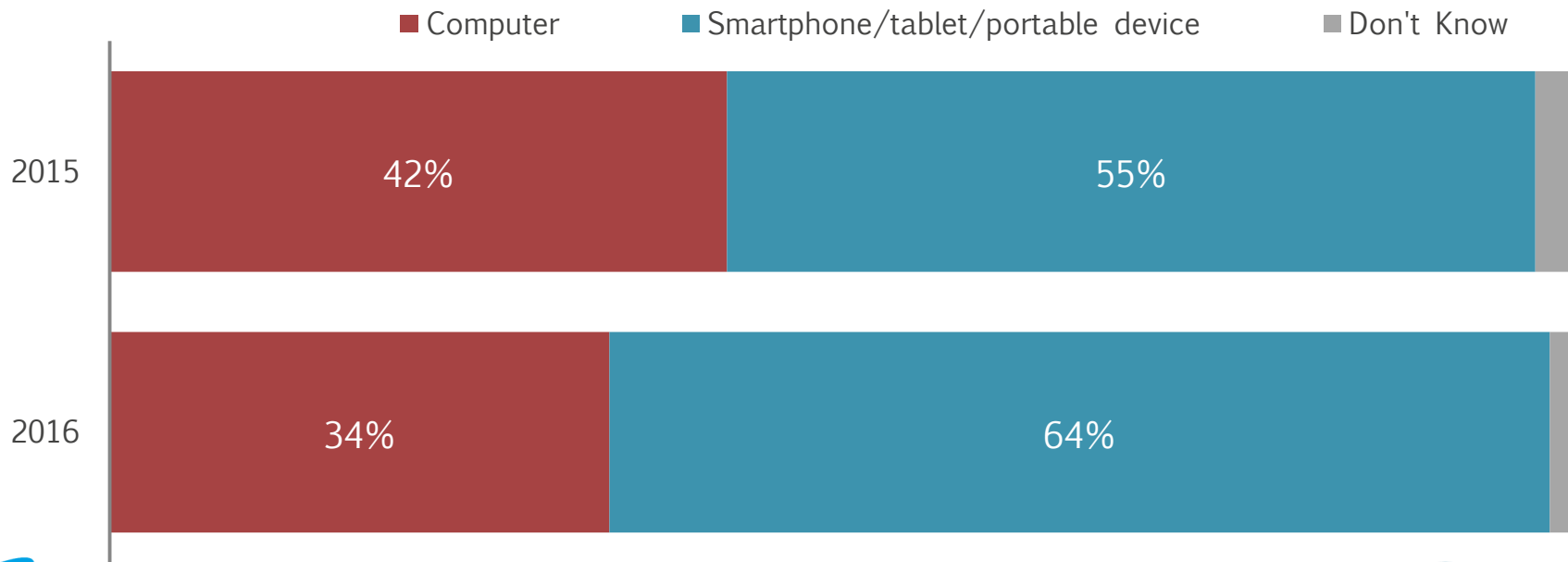




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Device Used Most Often to Listen to Podcasts

Base: Ever Listened to a Podcast

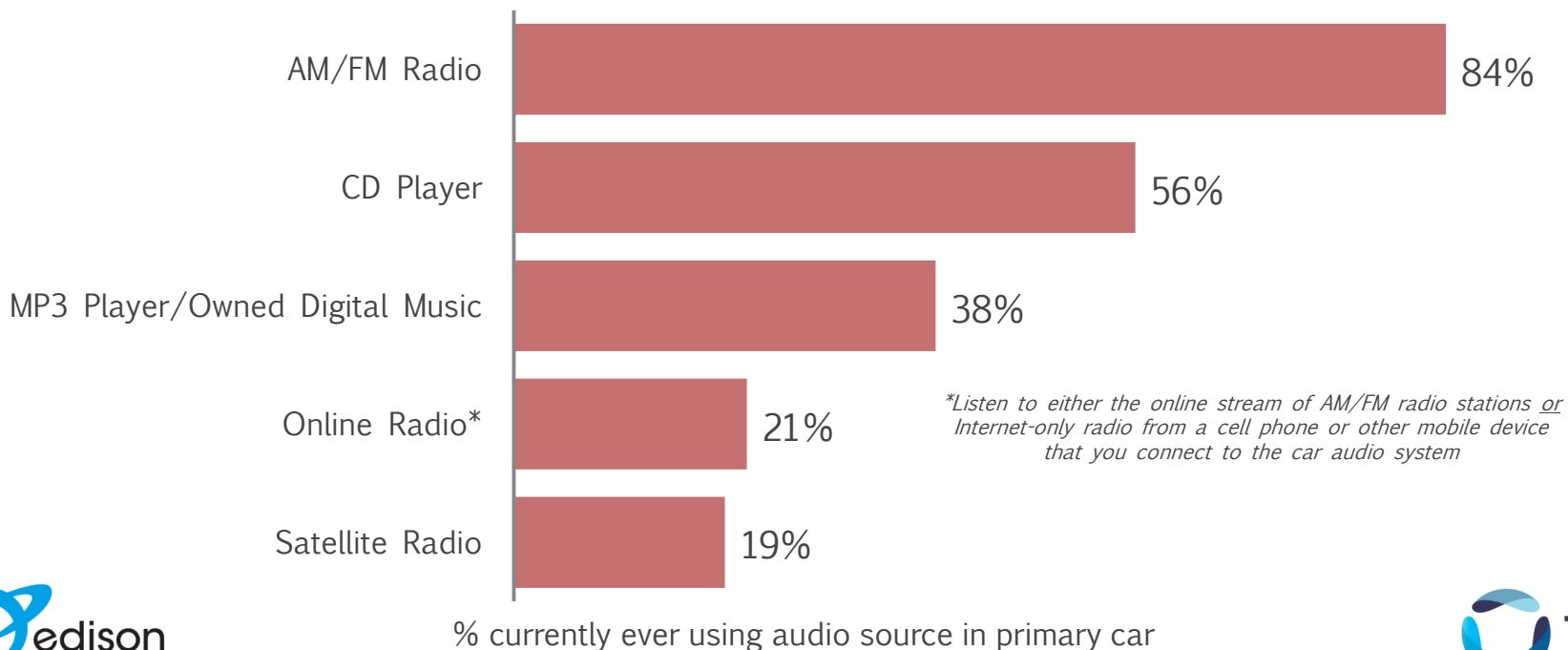




IN-CAR MEDIA

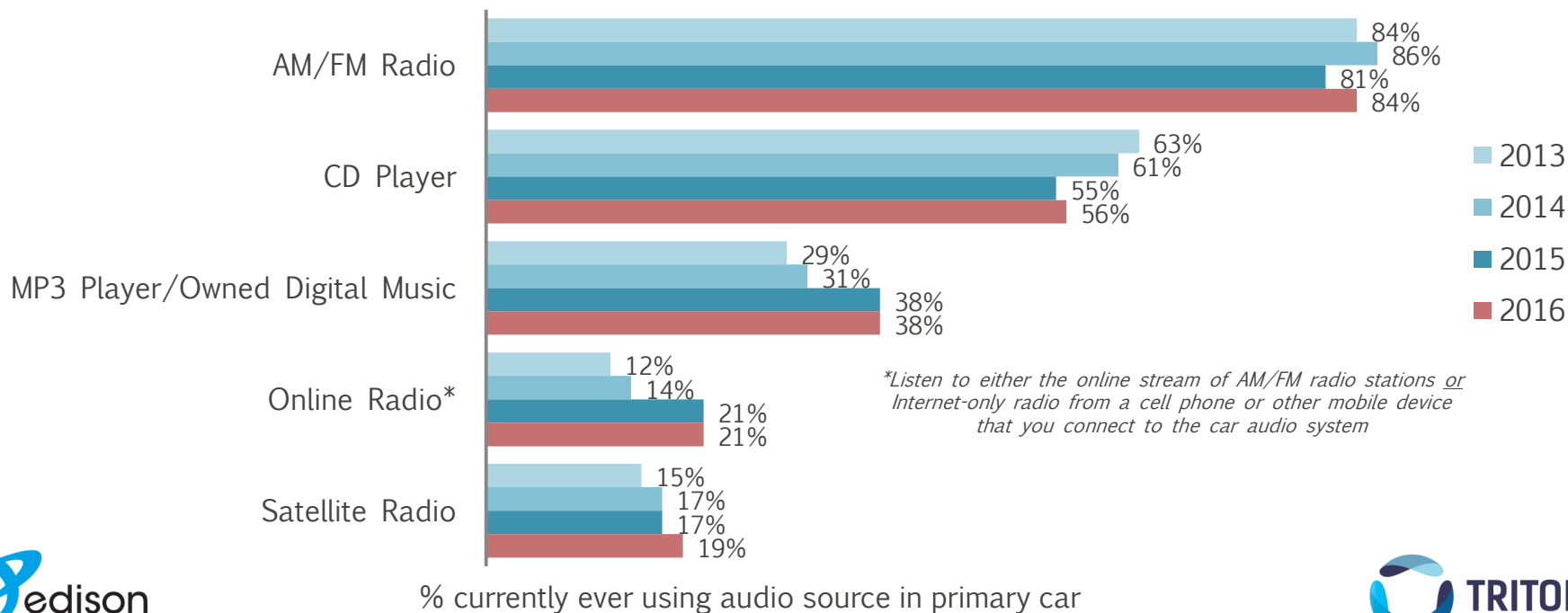
Audio Sources Used in Primary Car

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



Audio Sources Used in Primary Car

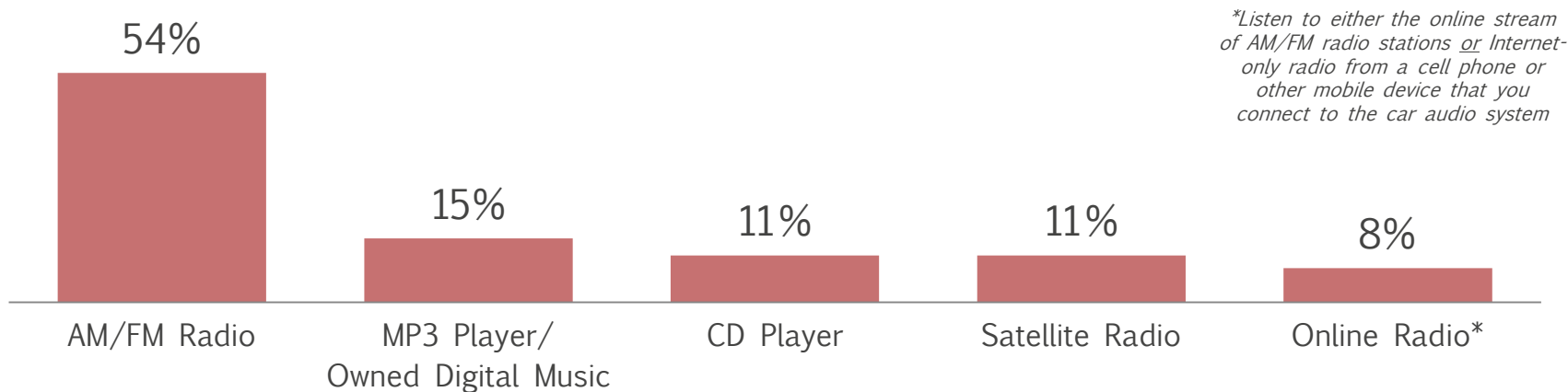
Base: Age 18+ and has driven/ridden in car in last month



Audio Sources Used at Least 'Most of the Times' in Primary Car

"In your primary car, how often do you use...?"

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



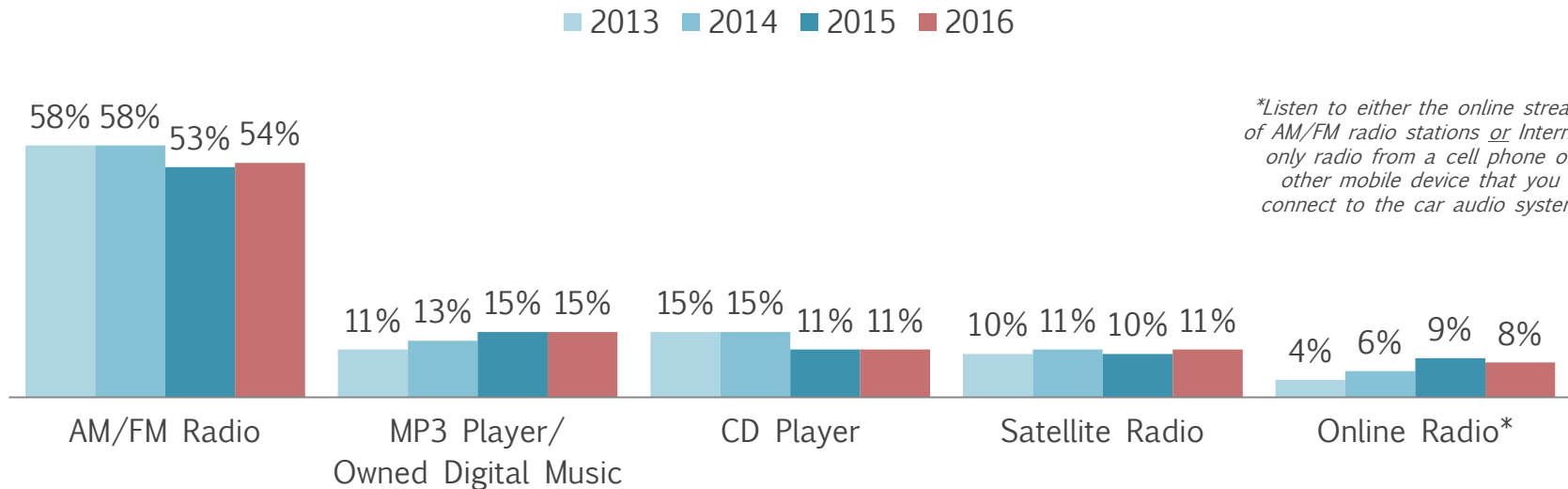
**Listen to either the online stream of AM/FM radio stations or Internet-only radio from a cell phone or other mobile device that you connect to the car audio system*

% using audio source "most" or "all" of the times in primary car

Audio Sources Used at Least 'Most of the Times' in Primary Car

"In your primary car, how often do you use...?"

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



**Listen to either the online stream of AM/FM radio stations or Internet-only radio from a cell phone or other mobile device that you connect to the car audio system*

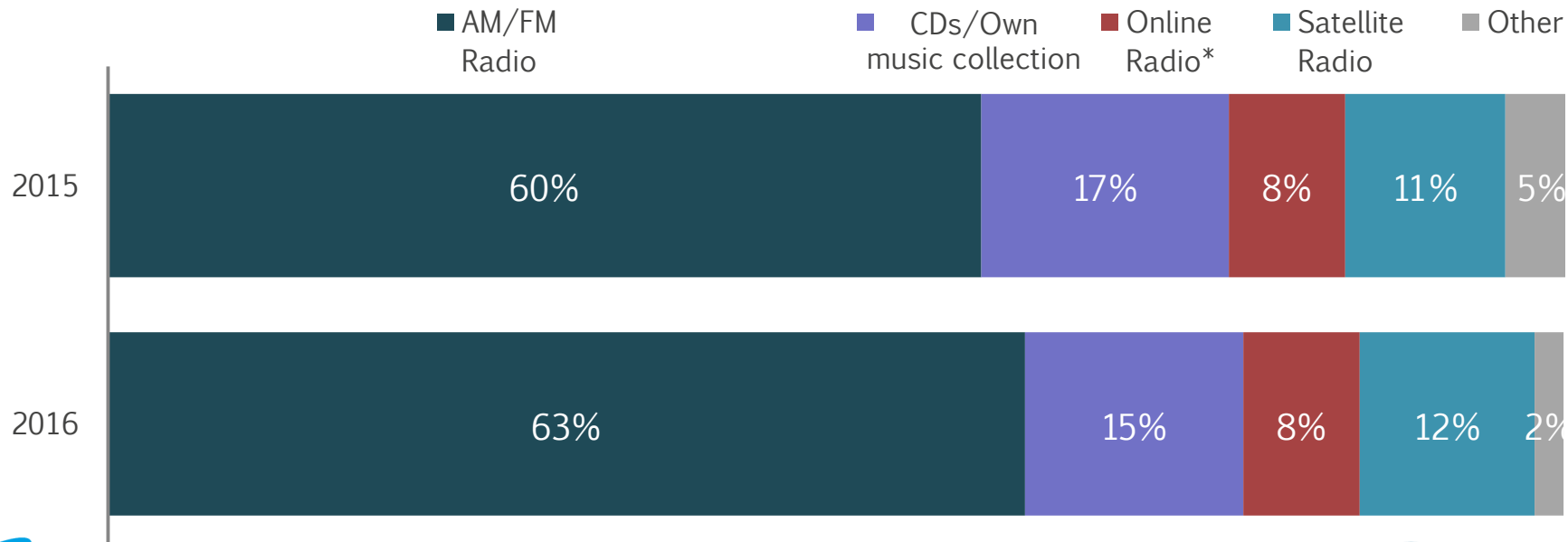
% using audio source "most" or "all" of the times in primary car



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Audio Source Used Most Often in Primary Car

Base: Use any audio source in primary car

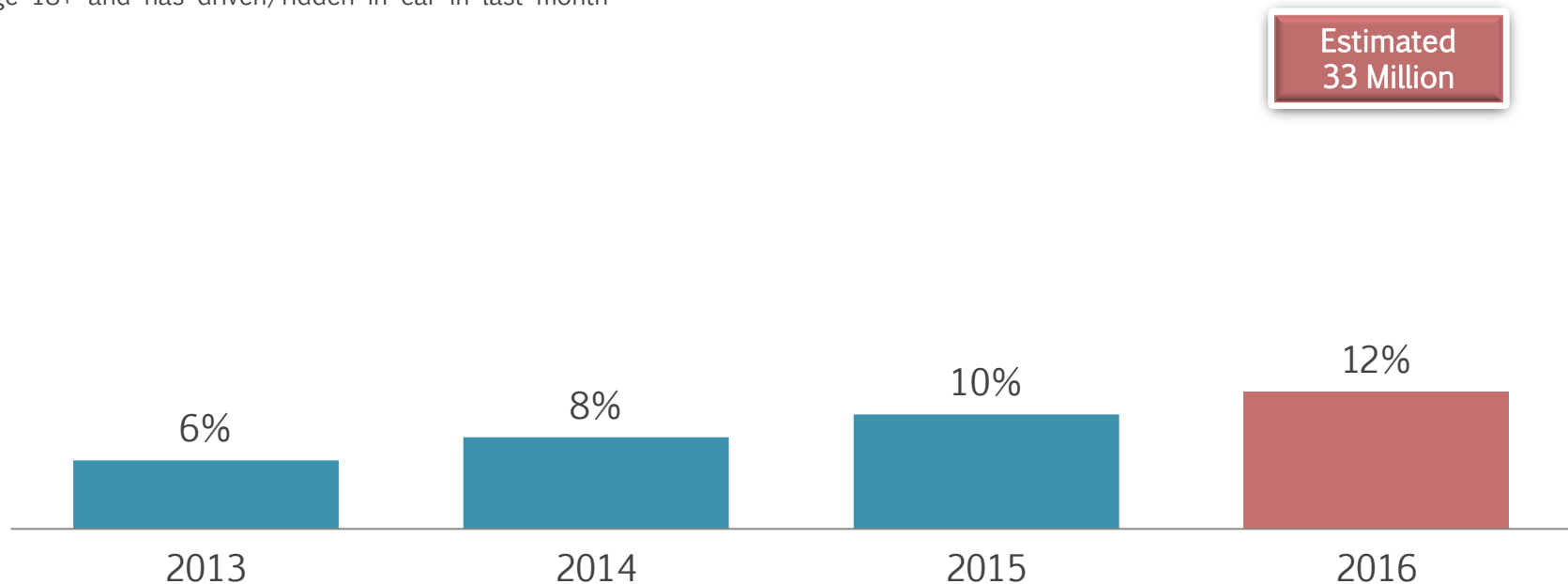


**Listen to either the online stream of AM/FM radio stations or Internet-only radio from a cell phone or other mobile device that you connect to the car audio system*



In-Dash Information and Entertainment Systems

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



% have an in-dash system in primary car



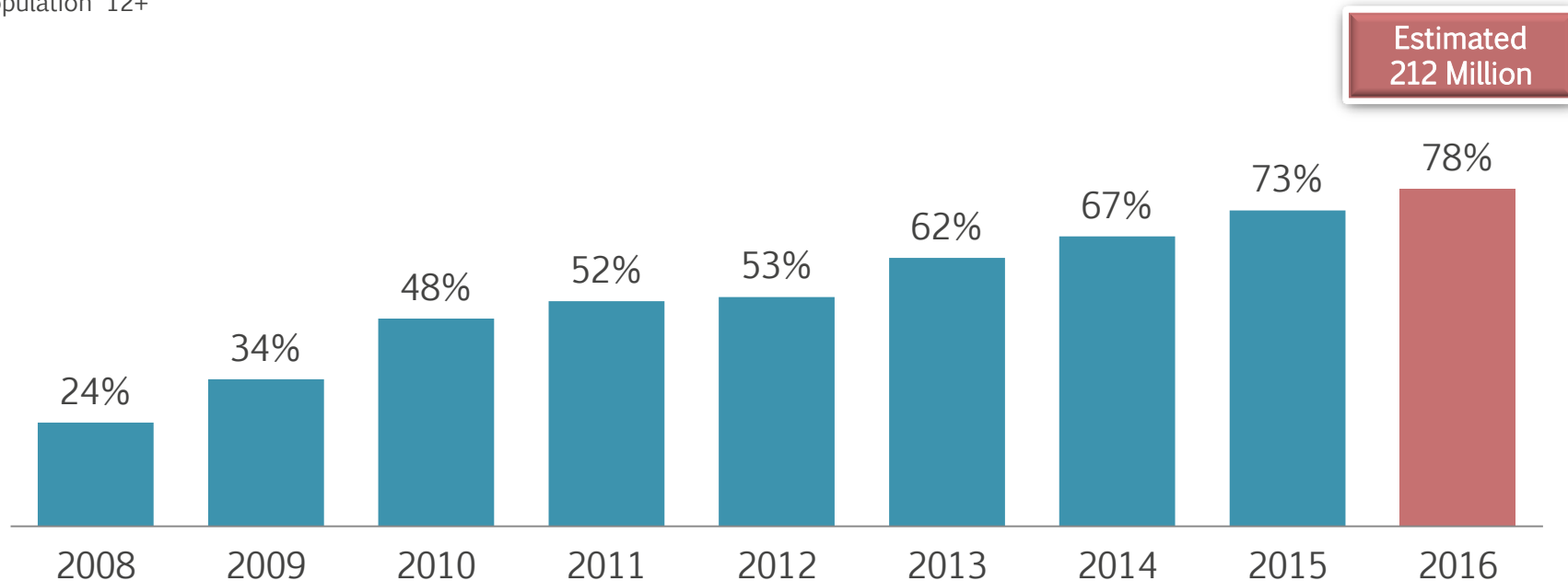
SOCIAL MEDIA



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Social Media Usage

Total Population 12+



% currently use any social media

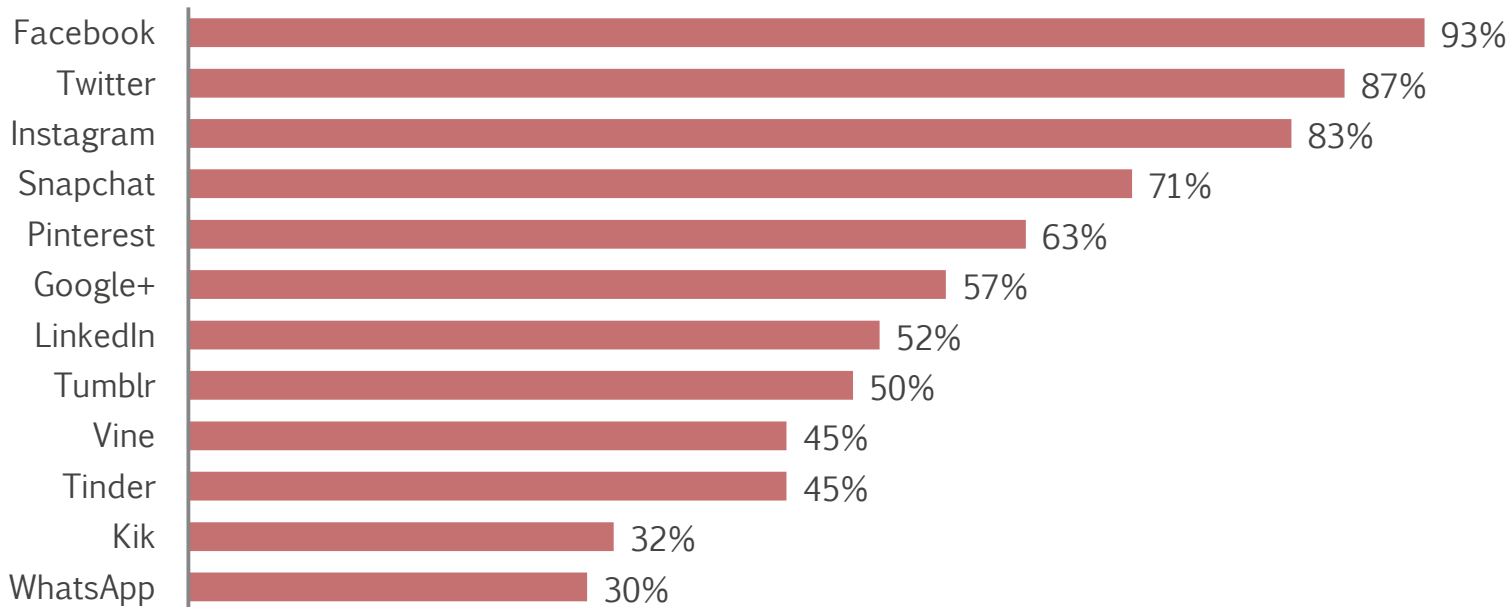




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Social Media Brand Awareness

Total Population 12+



% aware of social media brand



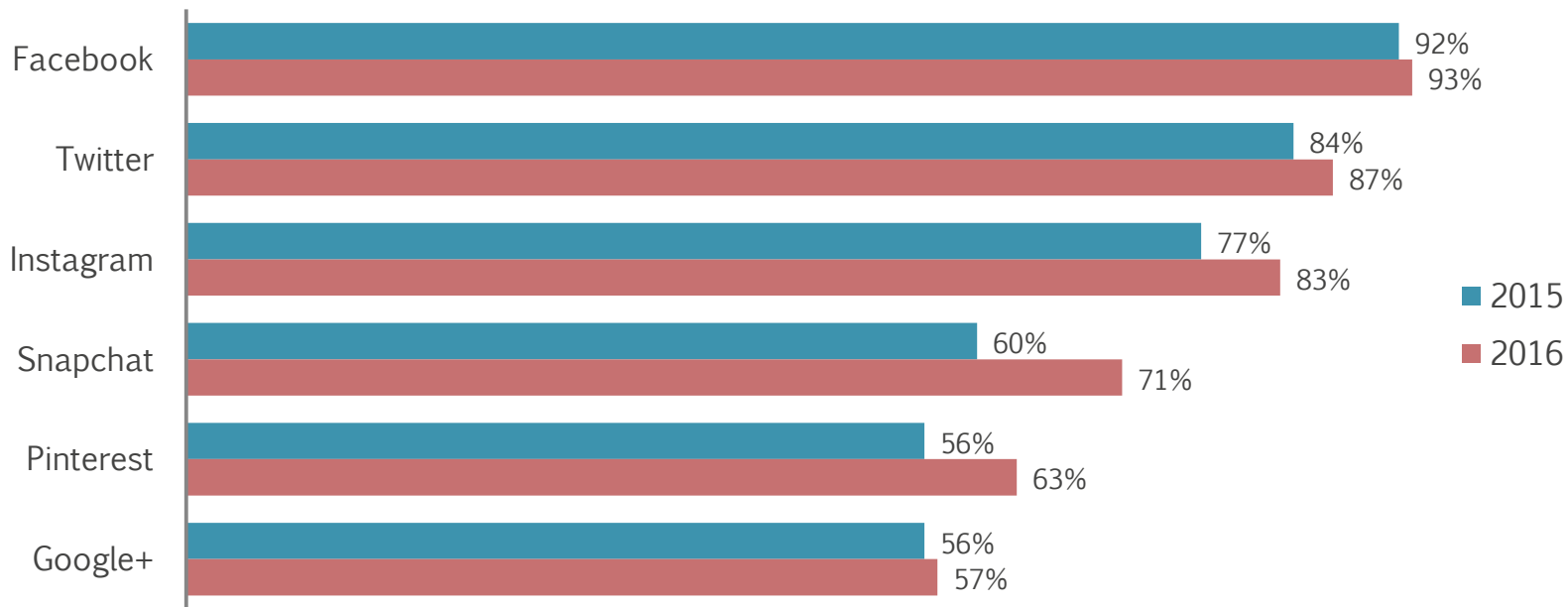


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Social Media Brand Awareness

Total Population 12+

Page 1 of 2



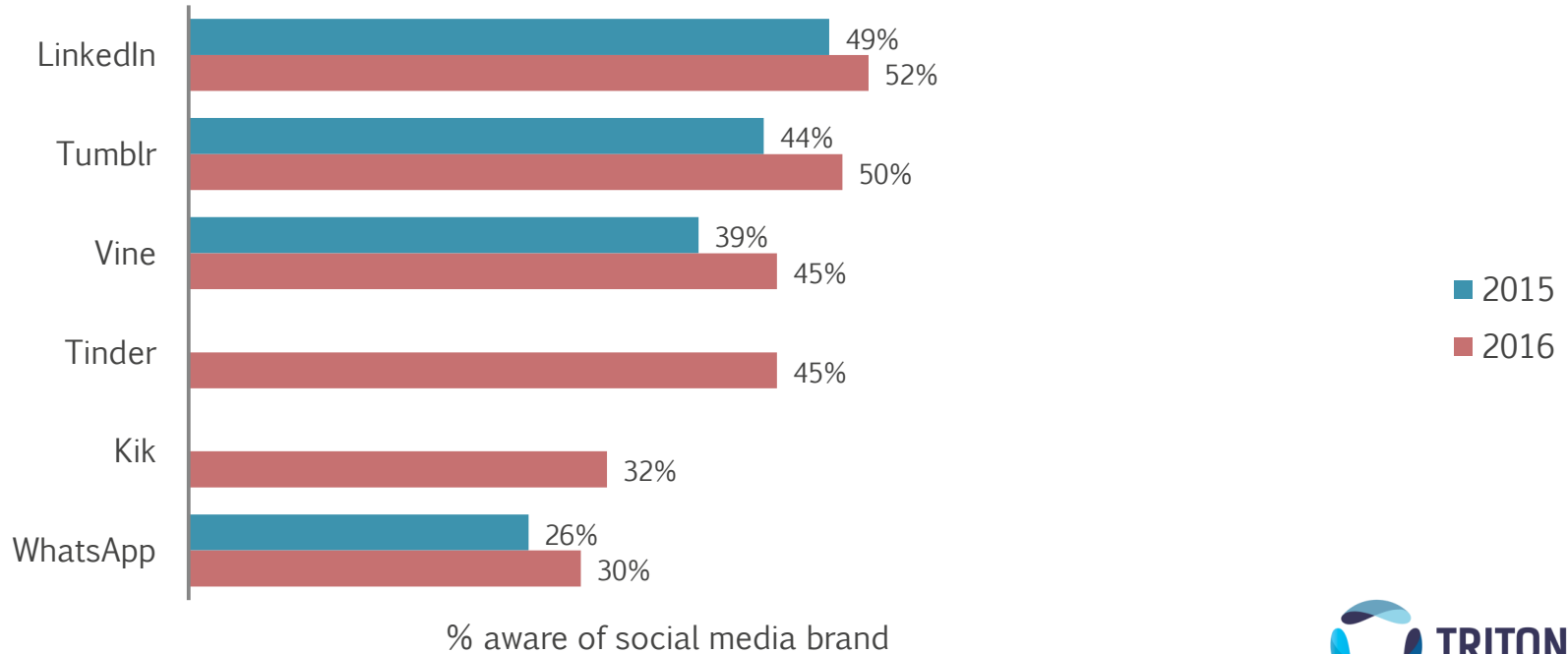
% aware of social media brand



Social Media Brand Awareness

Total Population 12+

Page 2 of 2

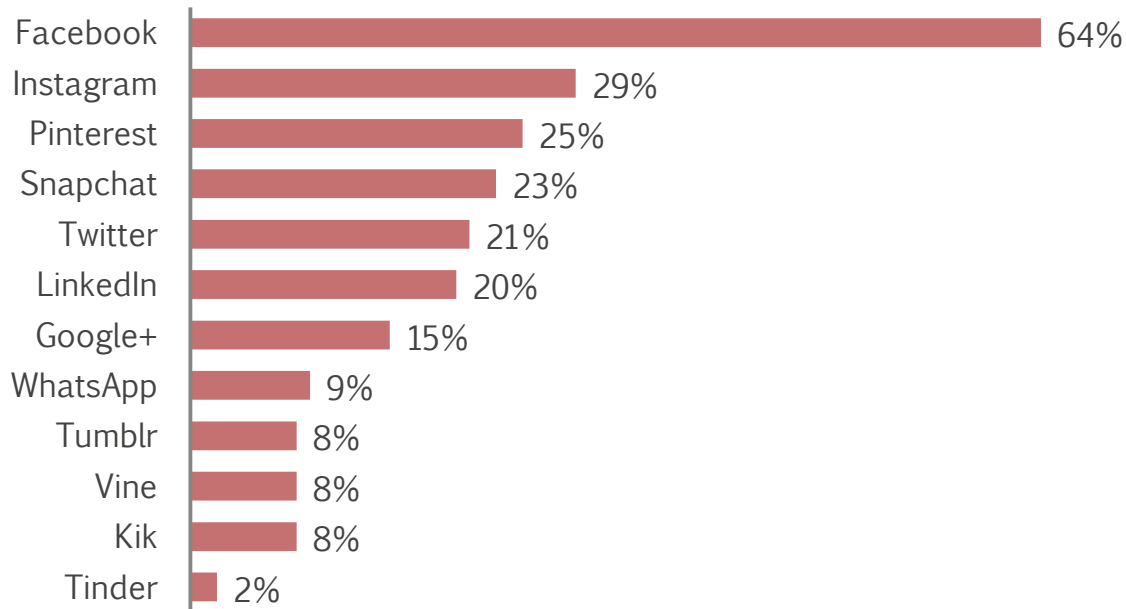




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Social Media Brand Usage

Total Population 12+



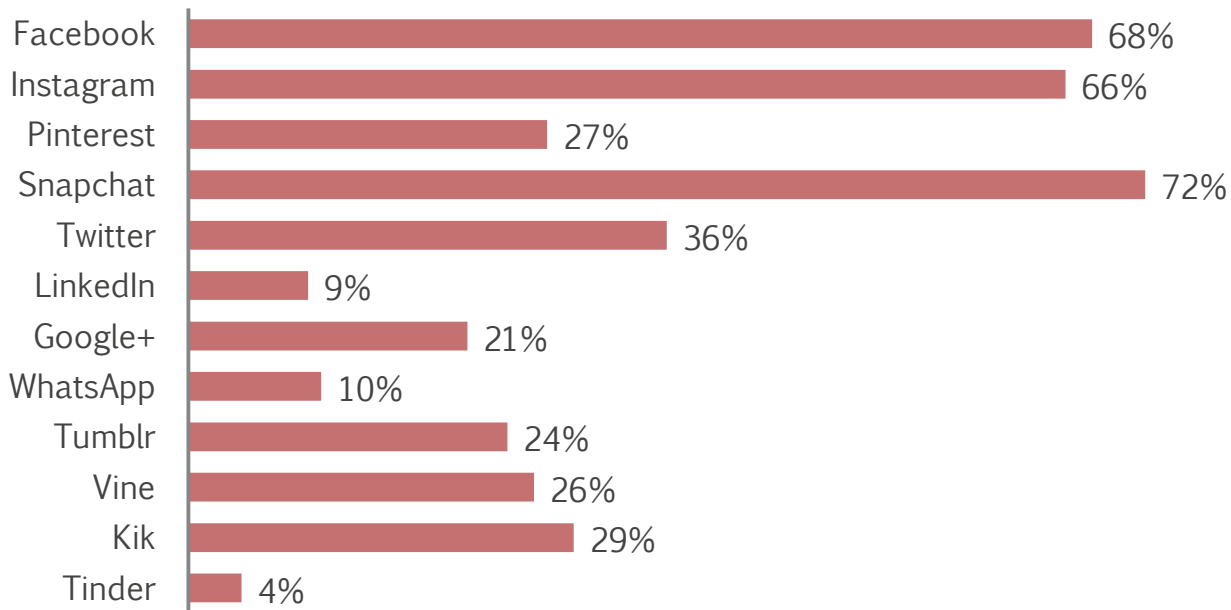
% currently ever use social media brand





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Social Media Brand Usage (Age 12-24)



% currently ever use social media brand

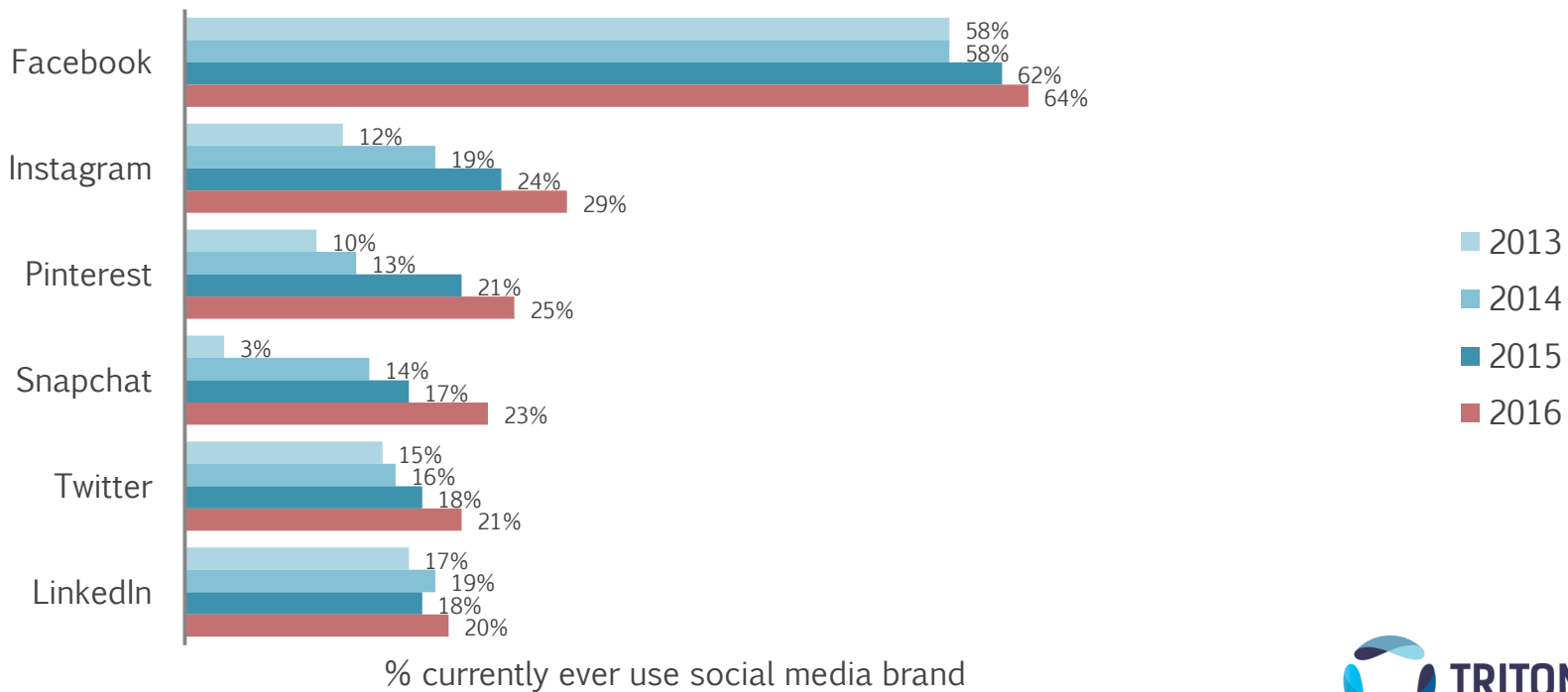




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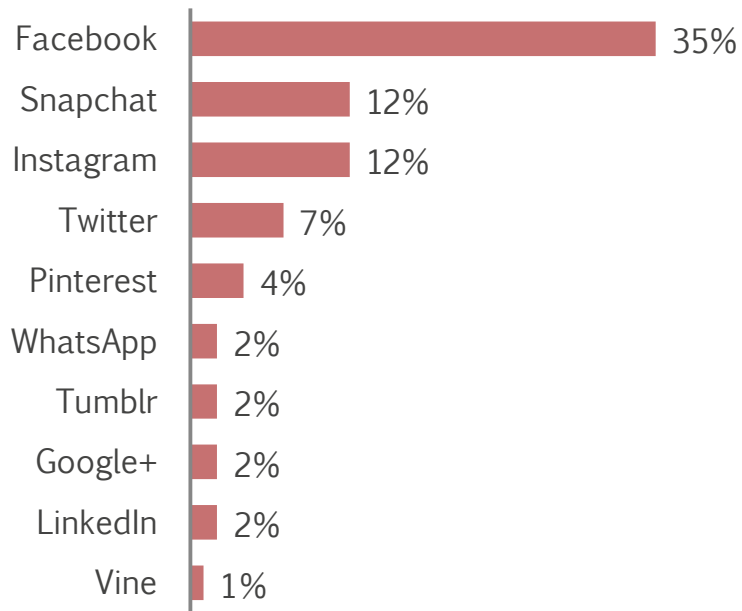
Social Media Brand Usage

Total Population 12+



Use Social Media Brand 'Several Times per Day'

Total Population 12+

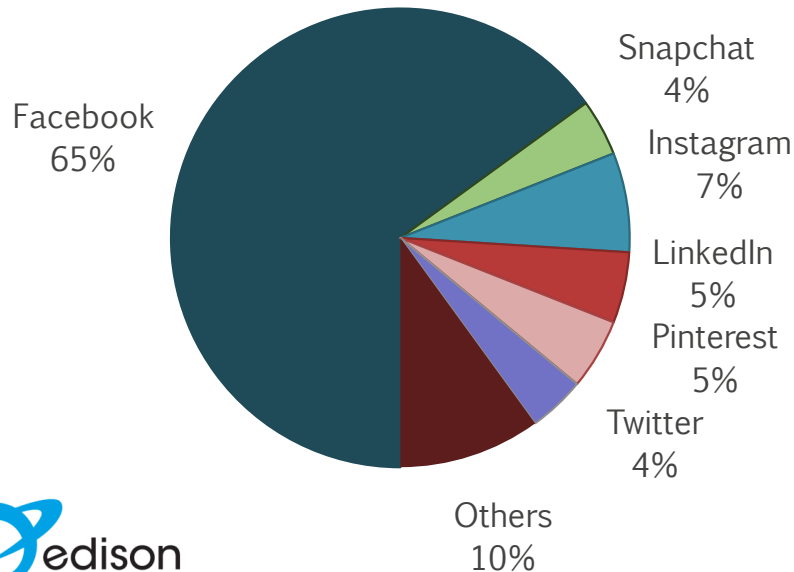


% using social media brand "several times per day"

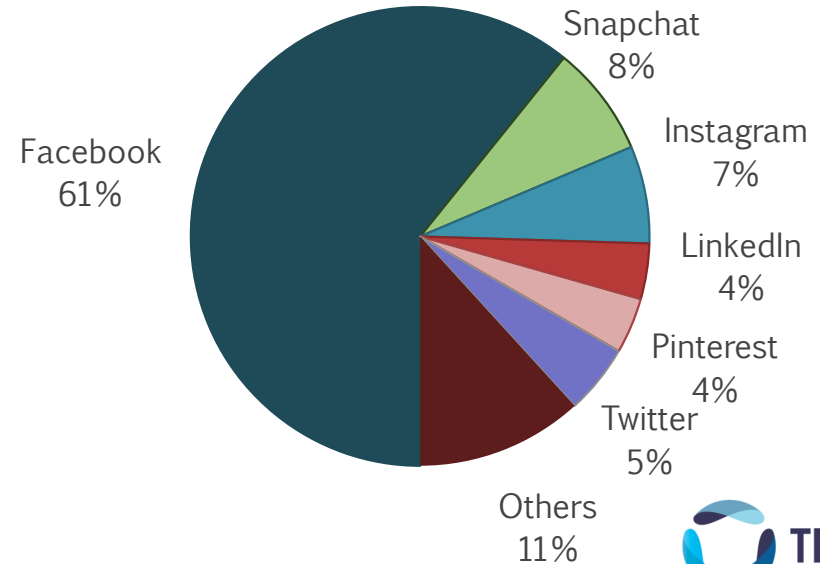
Social Media Brand Used Most Often

Base: Currently use any social networking brands

2015



2016



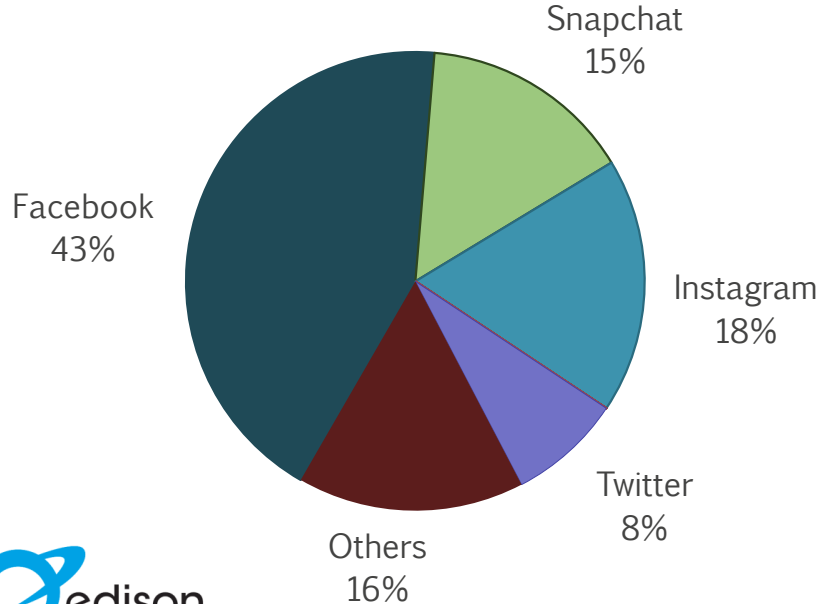


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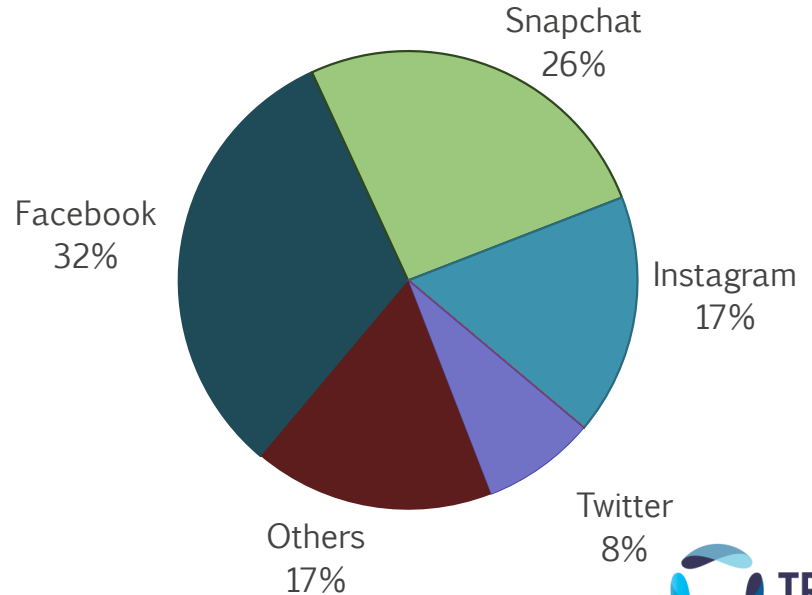
Social Media Brand Used Most Often (Age 12-24)

Base: Currently use any social networking brands

2015



2016



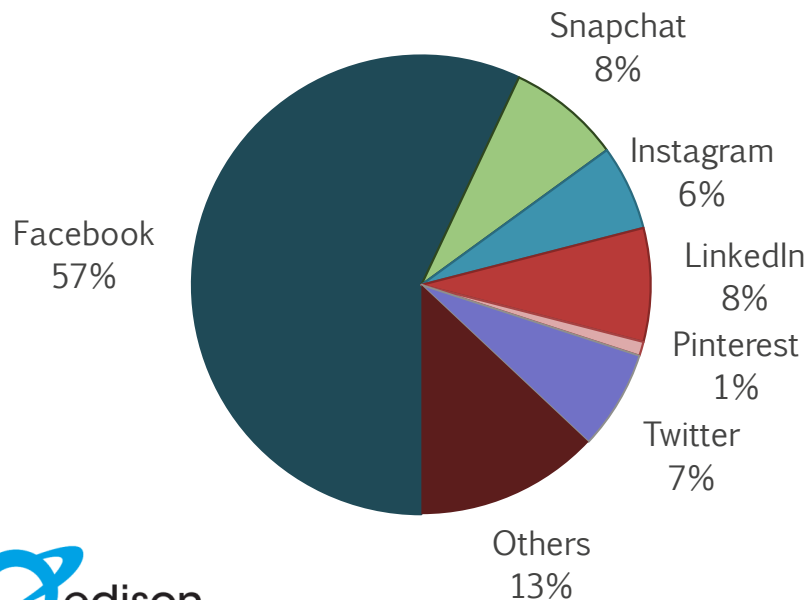


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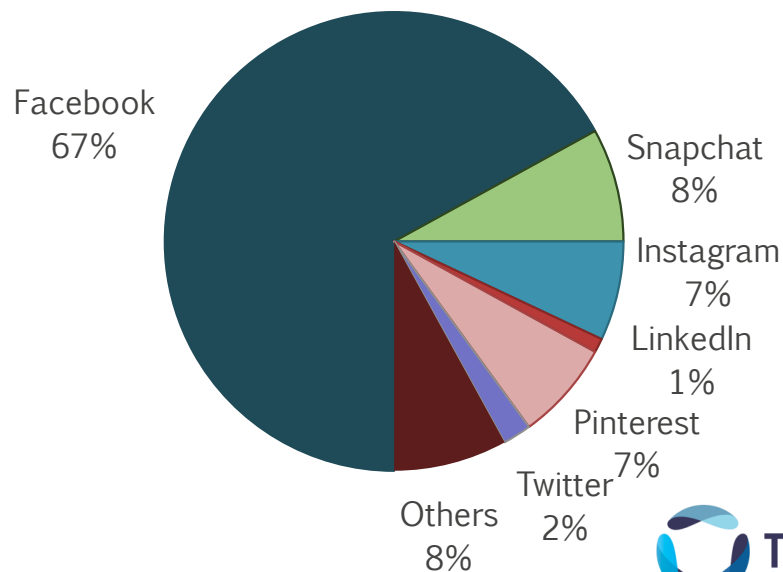
Social Media Brand Used Most Often

Base: Currently use any social networking brands

Men



Women

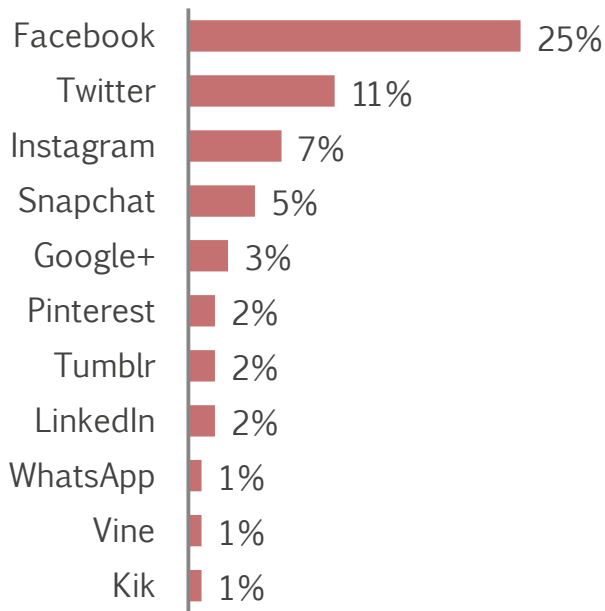




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Use Social Media Brand to Follow Political News or Candidates

Total Population 12+



% using social media brand to follow political news/candidates



Conclusions and Observations

- The Smartphone has rewritten the media landscape
- Netflix and on-demand audio series smash the “attention span” myth



THE INFINITE DIAL
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Conclusions and Observations

- “Over-the-air” radio has very real in-home “hardware” concerns
- Majority of 12-54s are regular online radio listeners—and that listening is becoming more and more habitual
- Pandora remains the clear leader in streaming services. Spotify has made major gains



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Conclusions and Observations

- Nearly 100 million Americans have ever listened to a podcast—it has made the jump to mainstream
- Teens are flocking to Snapchat—and thus are increasingly harder to reach on social media



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