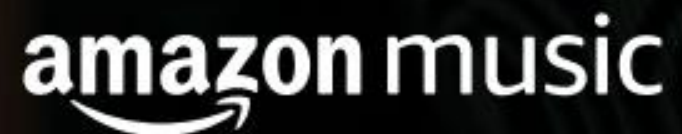


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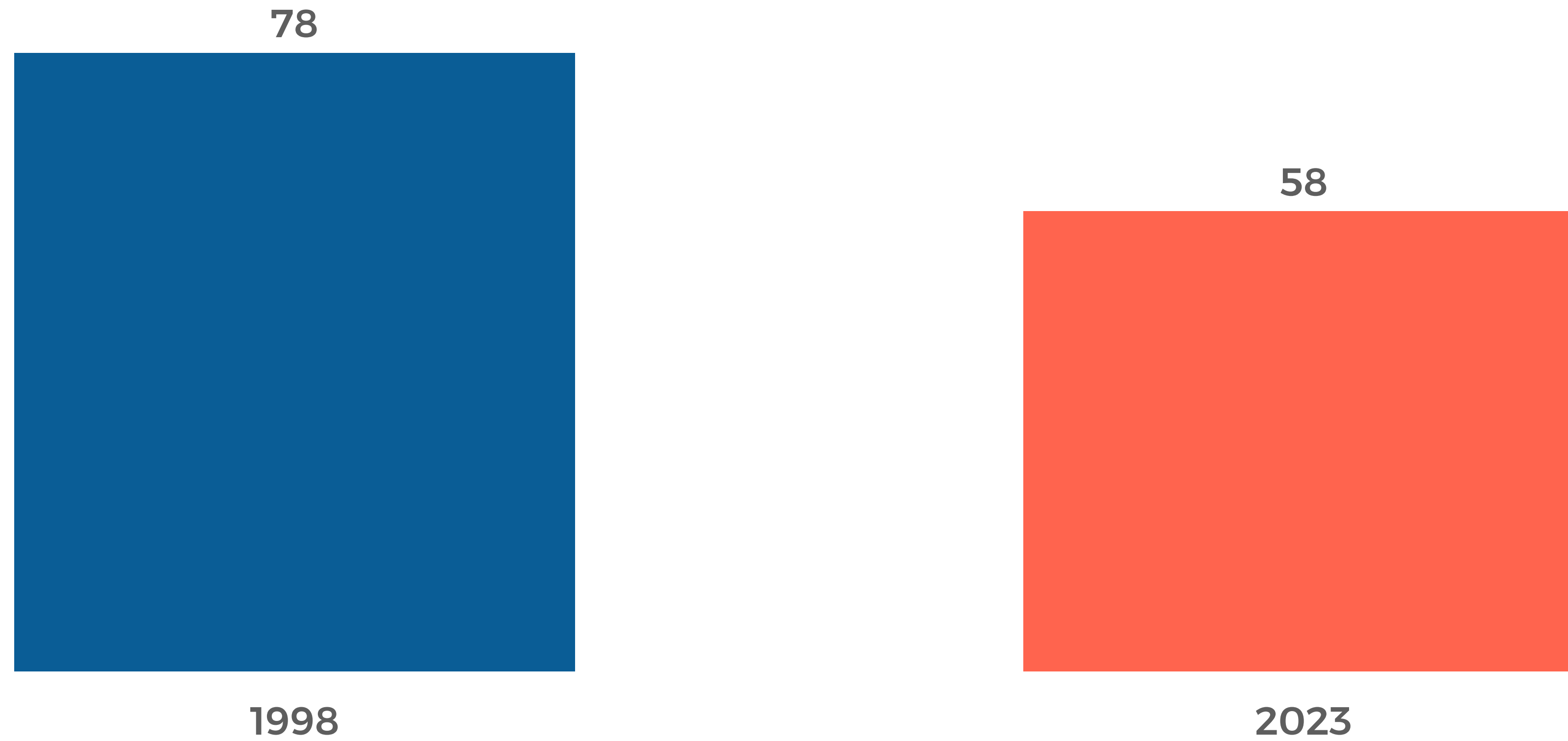


#InfiniteDial

America is Far More Diverse

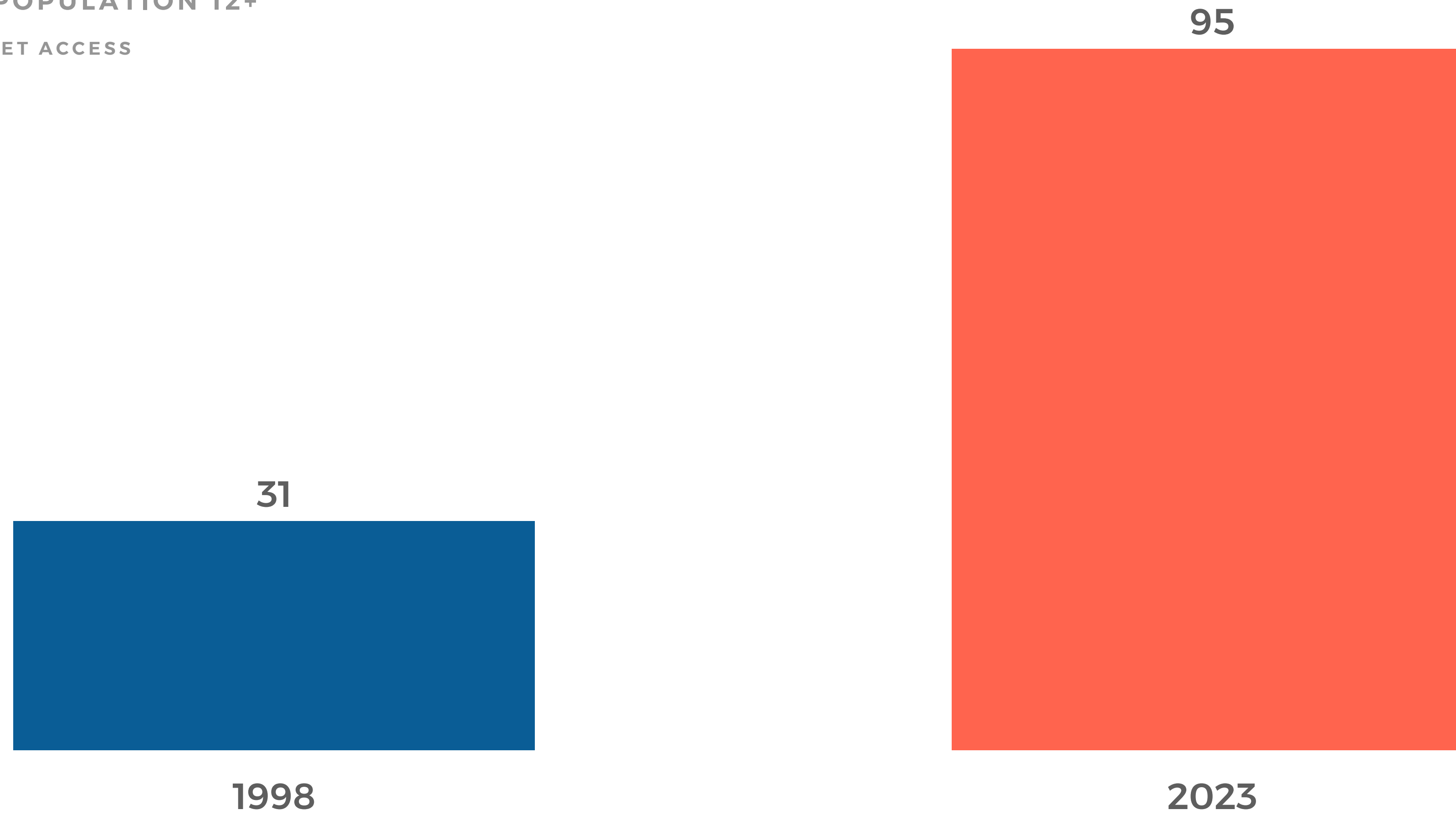
TOTAL U.S. POPULATION 12+

% WHITE



Internet Access Becomes Nearly Universal

TOTAL U.S. POPULATION 12+
% HAVE INTERNET ACCESS



In 1998:

6%

of Americans age 12+ had
ever listened to online audio

In 2023:

70%

of Americans age 12+ have
listened to online audio in
the last week

In 1998:

50%

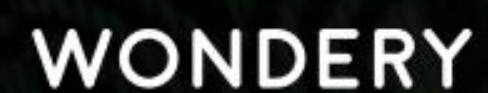
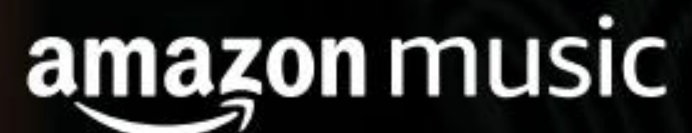
of Americans age 12+ had
a computer in their household

In 2023:

91%

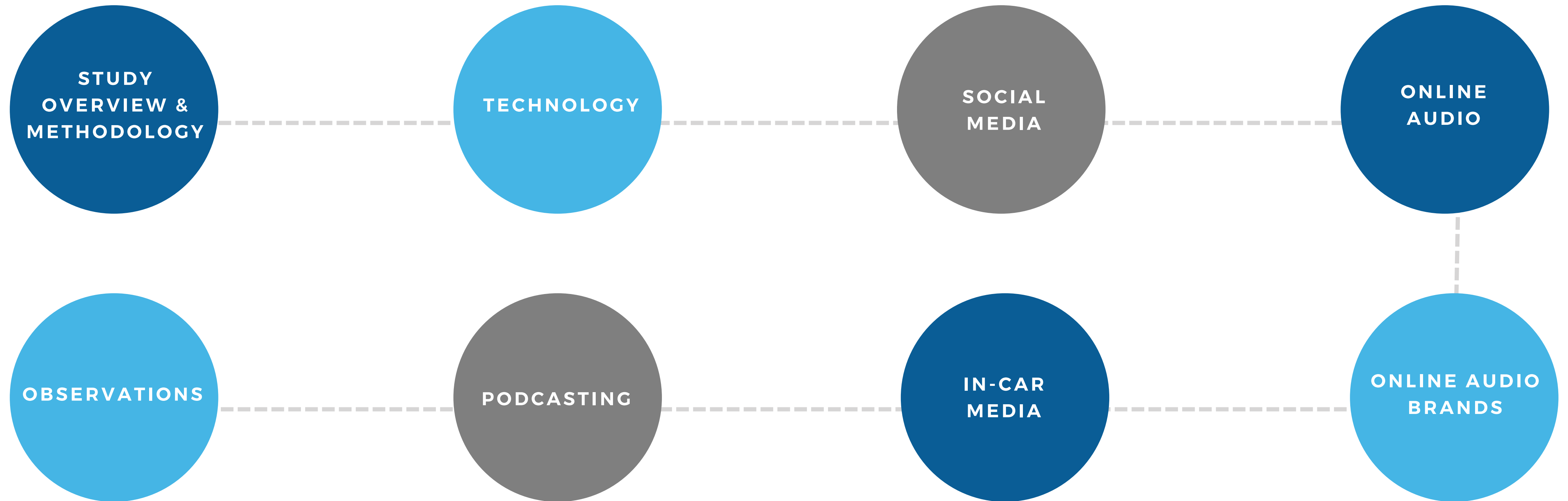
of Americans age 12+ have
a smartphone

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#InfiniteDial

Presentation Outline



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 2023, Edison Research conducted a national telephone survey of 1500 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



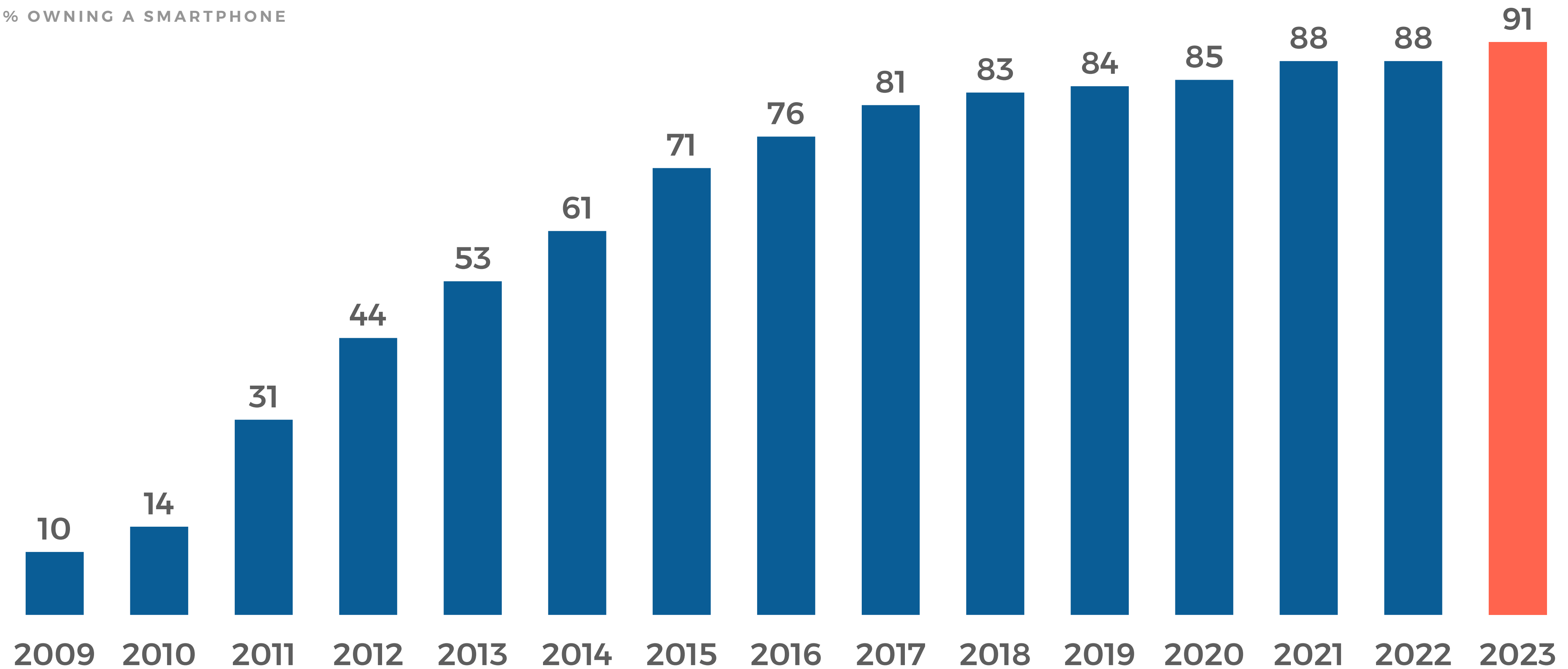
Technology

Smartphone Ownership

TOTAL U.S. POPULATION 12+

% OWNING A SMARTPHONE

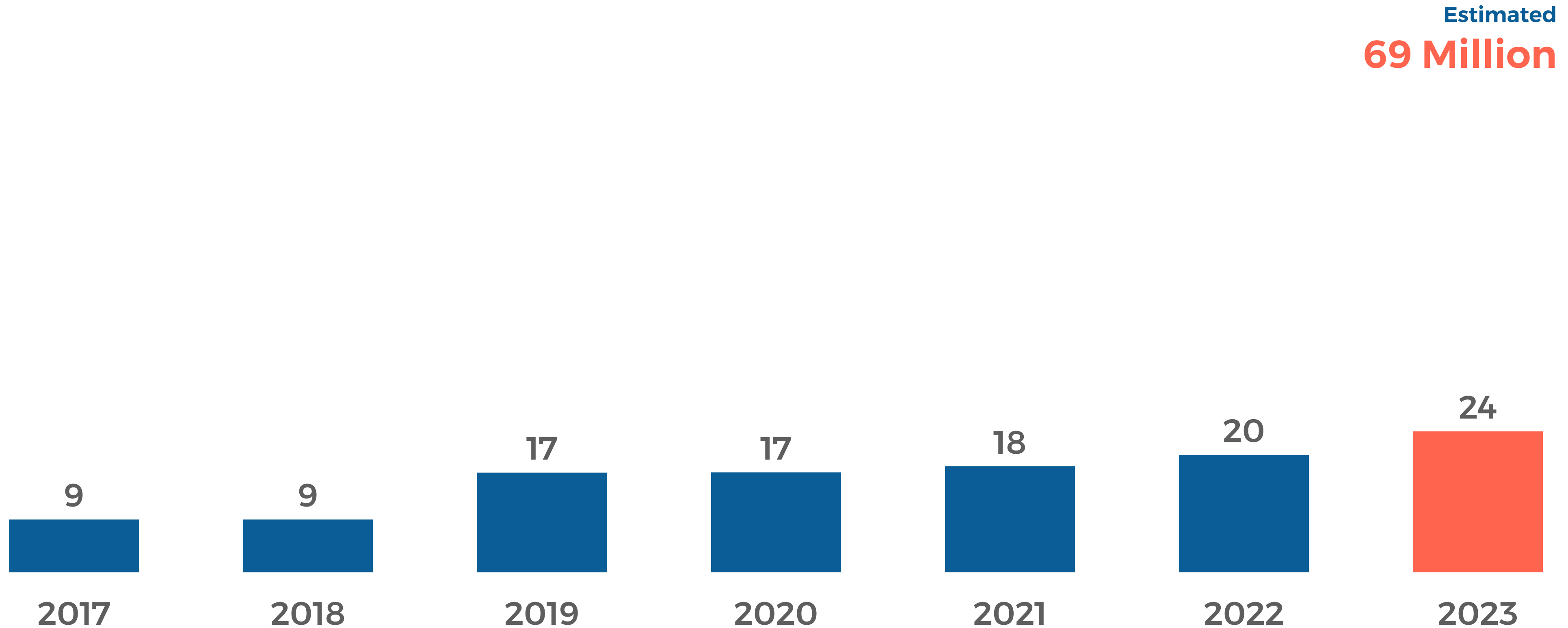
Estimated
260 Million



Smart Watch Ownership

TOTAL U.S. POPULATION 12+

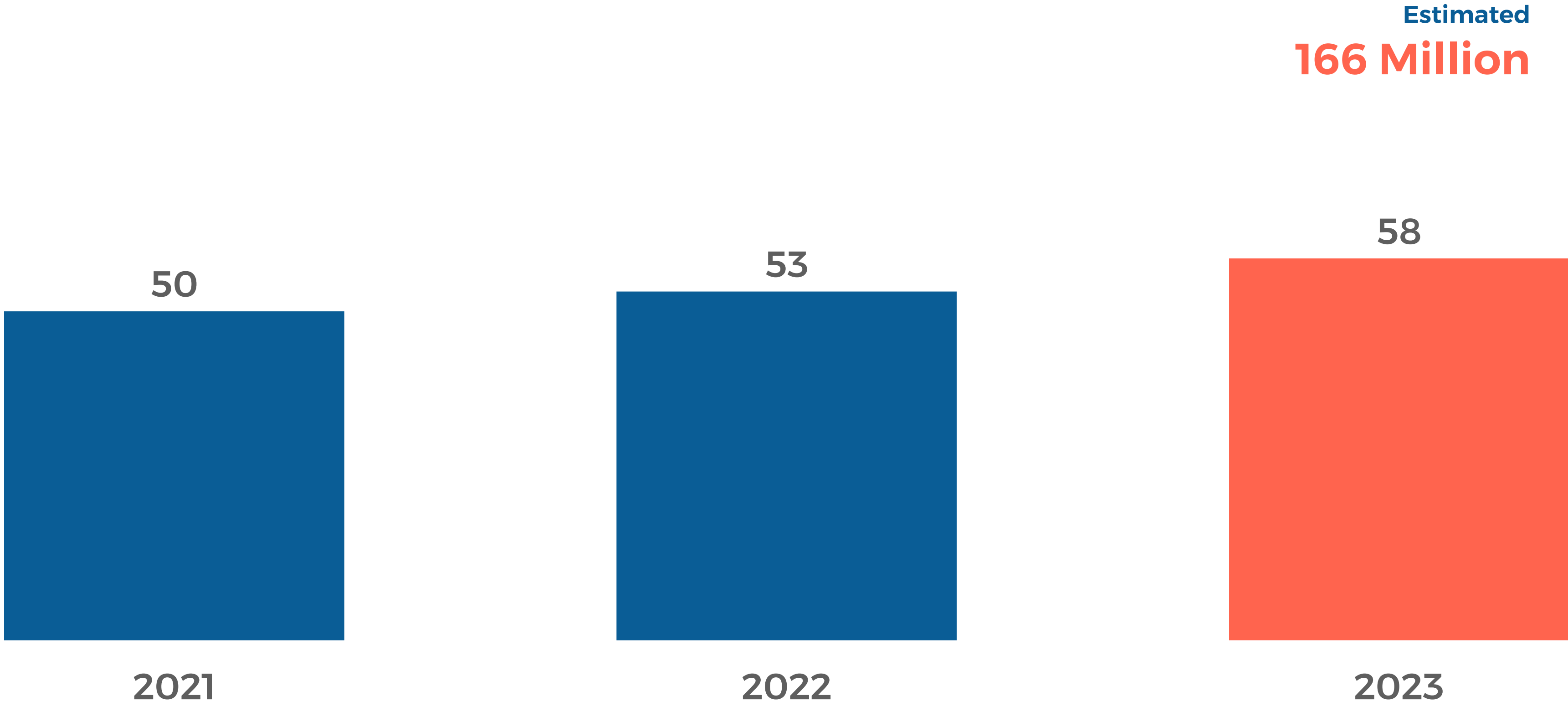
% OWNING A SMART WATCH



Bluetooth-Enabled Wireless Headphones Ownership

TOTAL U.S. POPULATION 12+

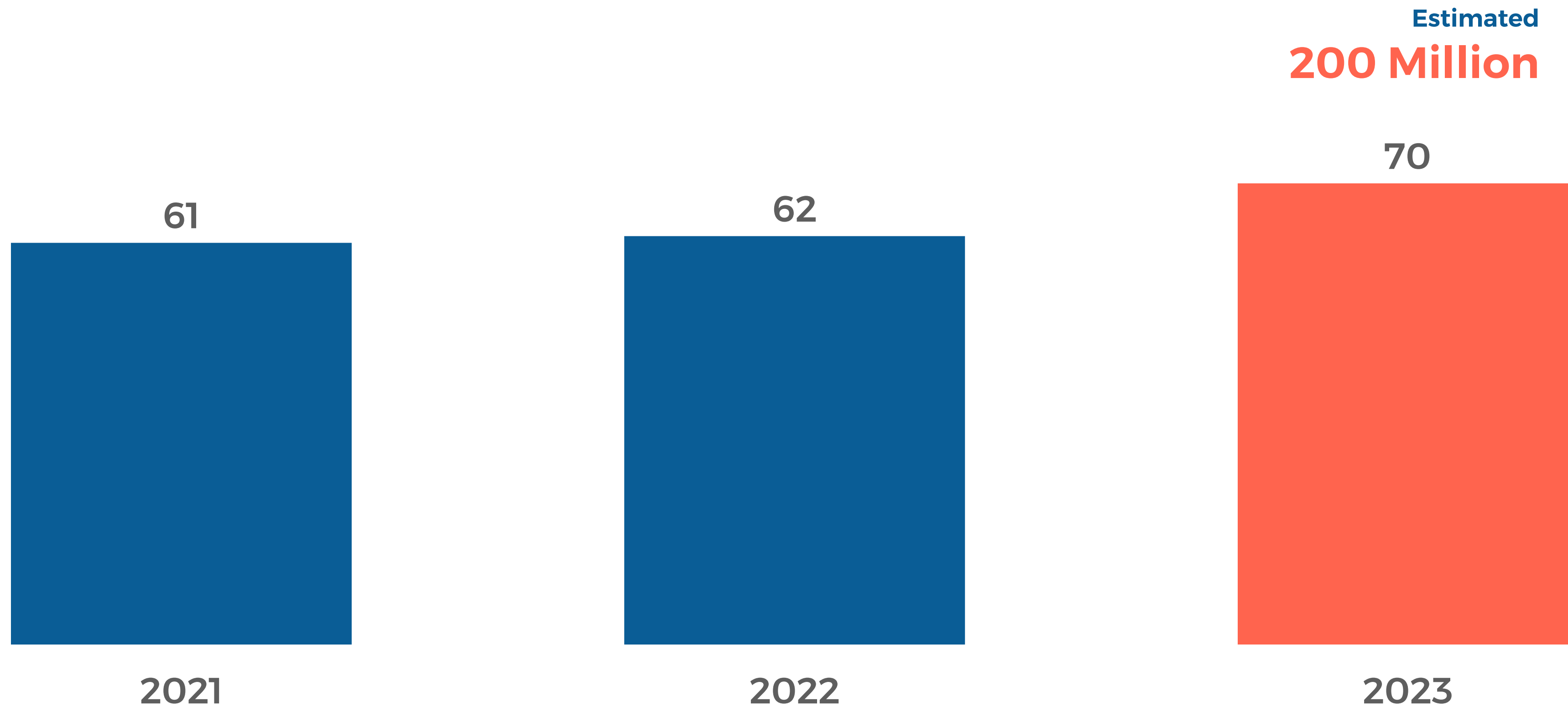
% OWNING BLUETOOTH-ENABLED WIRELESS HEADPHONES/EARPHONES



Smart TV Ownership

TOTAL U.S. POPULATION 12+

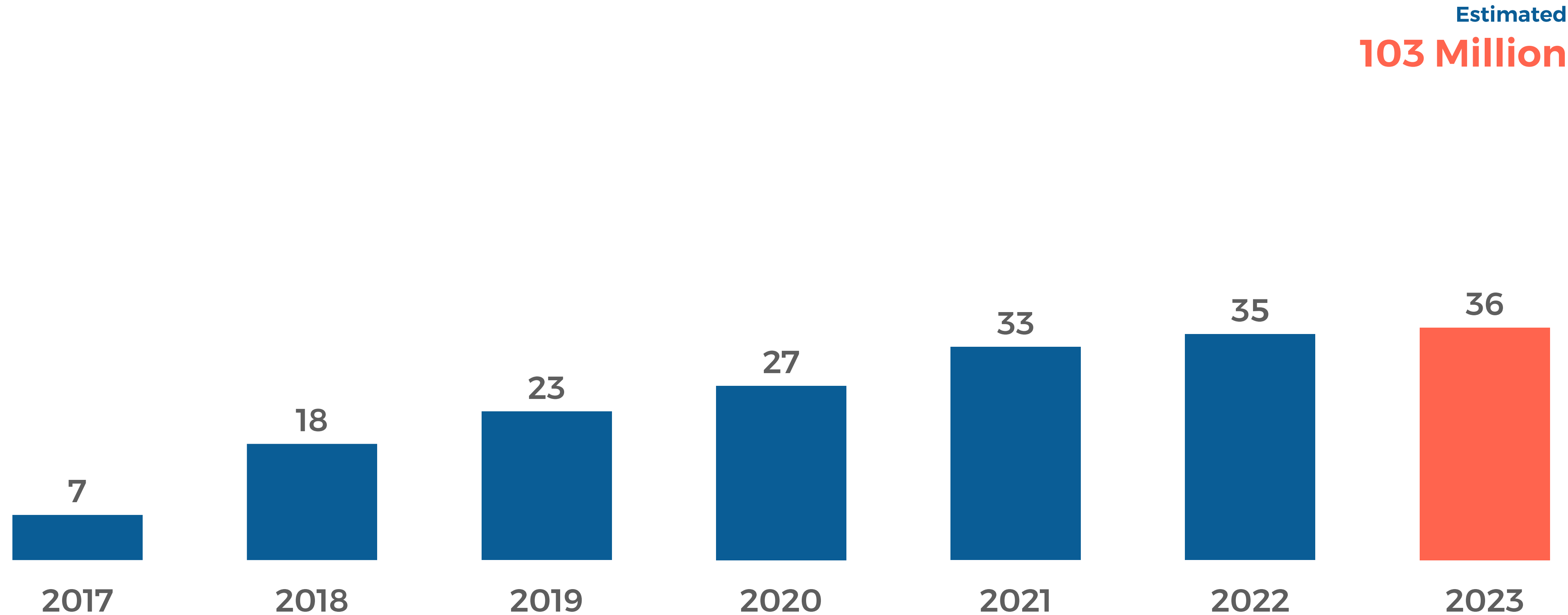
% OWNING A SMART TV



Smart Speaker Ownership

TOTAL U.S. POPULATION 12+

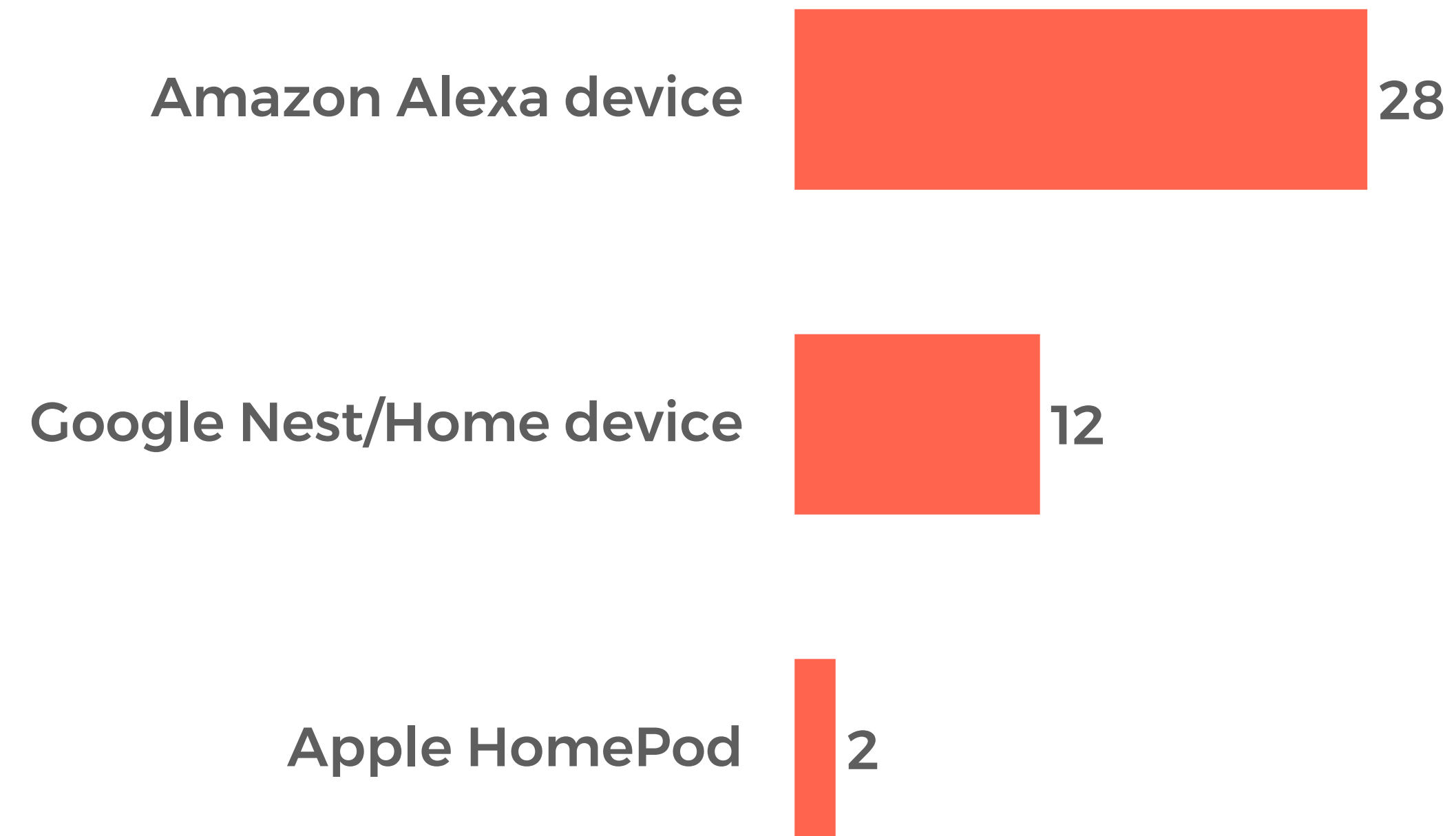
% OWNING A SMART SPEAKER



Smart Speaker Ownership

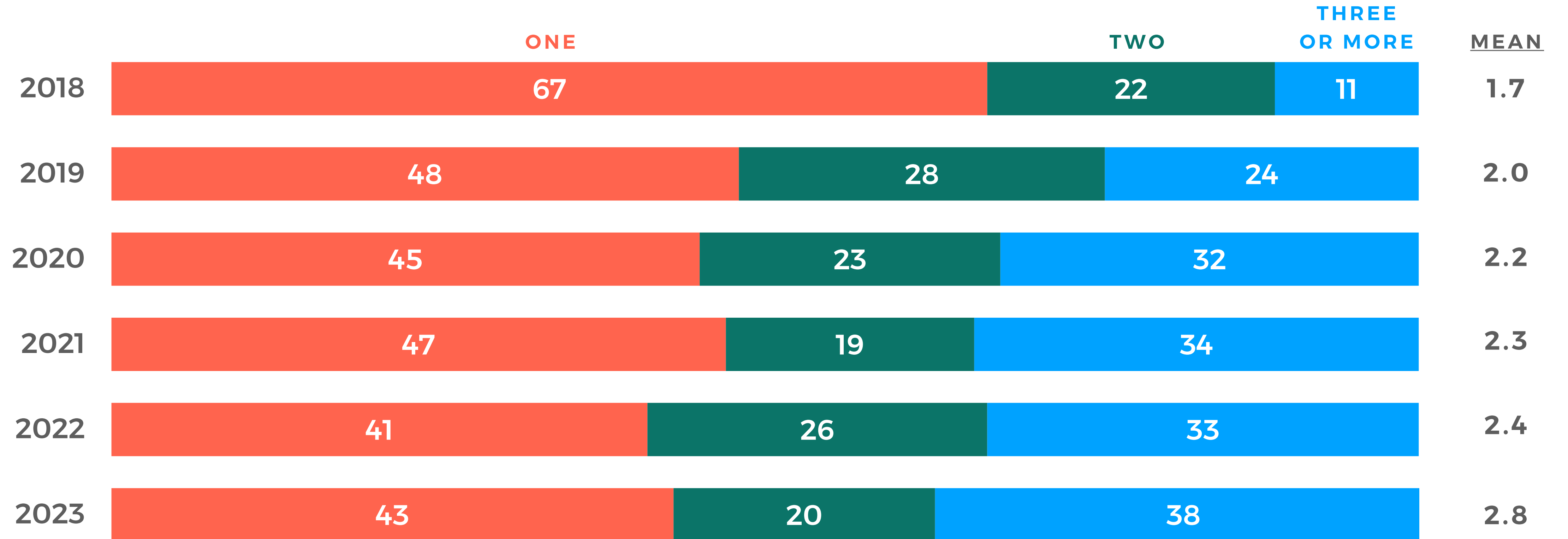
TOTAL U.S. POPULATION 12+

% OWNING SMART SPEAKER BRAND



Number of Smart Speakers in Household

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



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Social Media



WONDERY



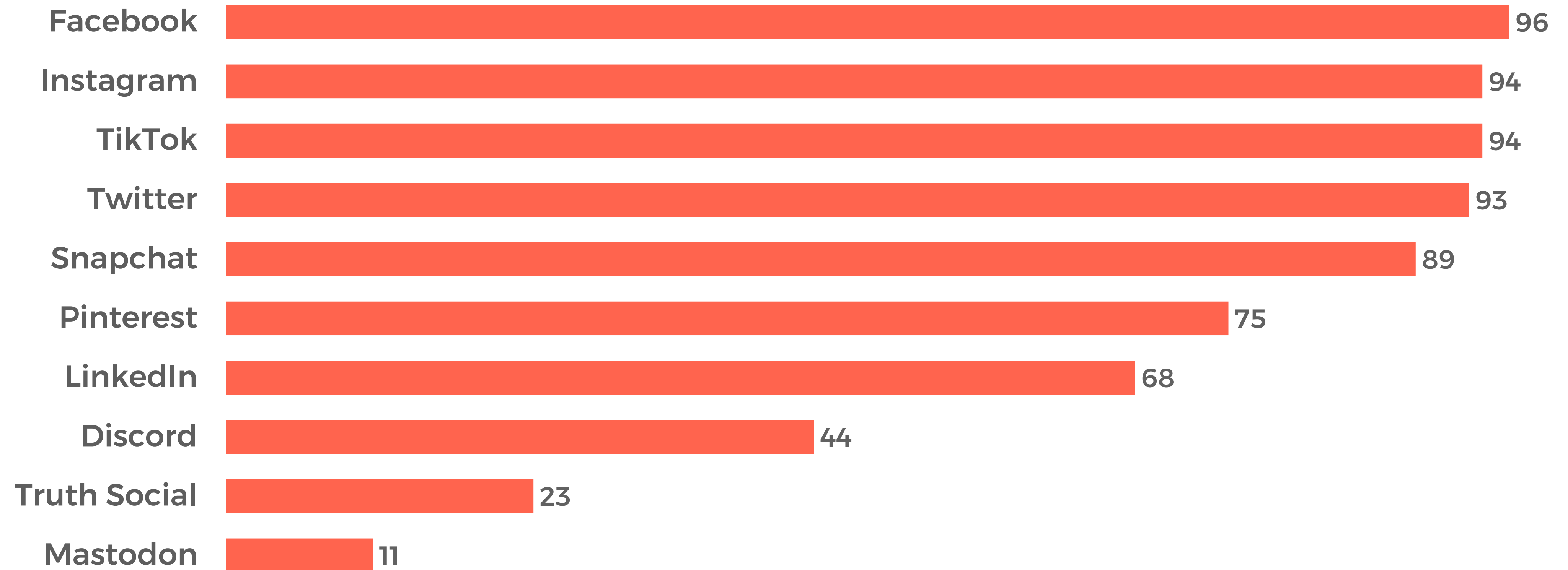
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Social Media Brand Awareness

TOTAL U.S. POPULATION 12+

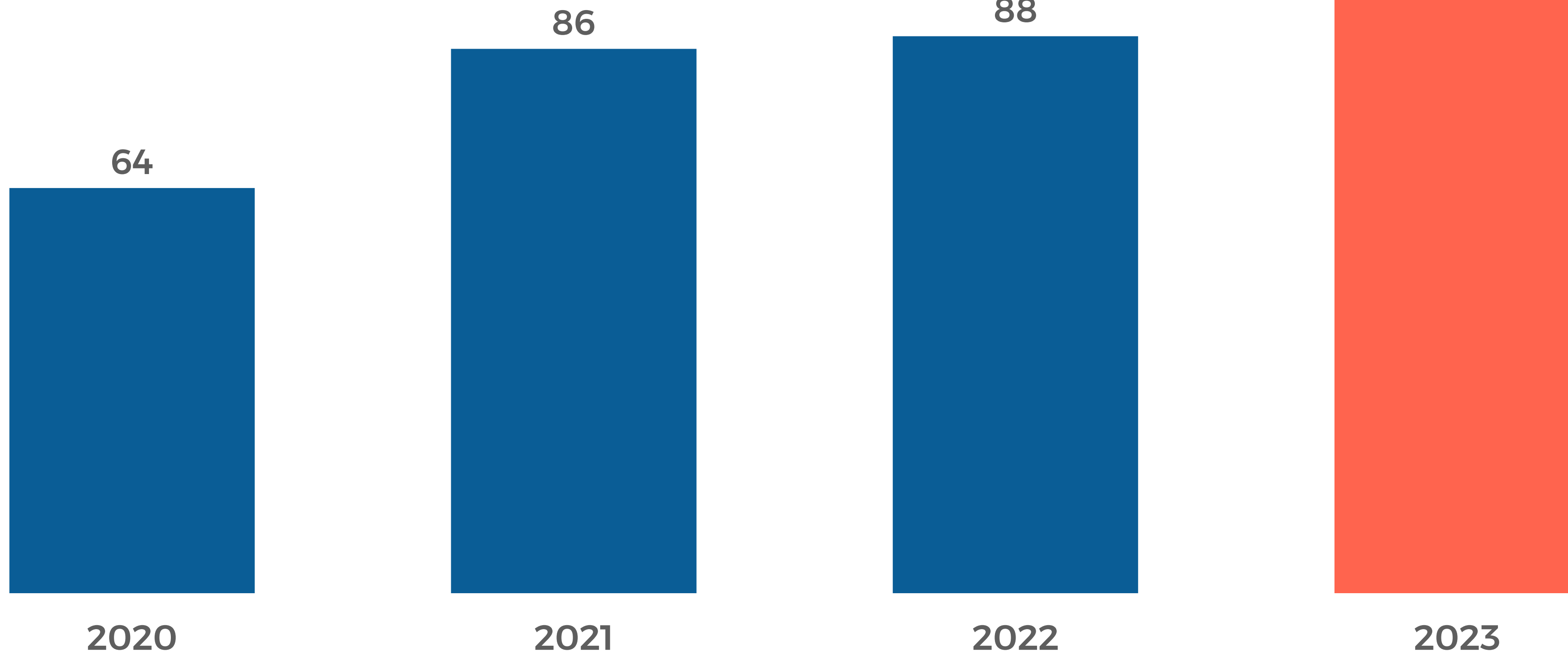
% AWARE OF SOCIAL MEDIA BRAND



TikTok Awareness

TOTAL U.S. POPULATION 12+

% AWARE OF TIKTOK

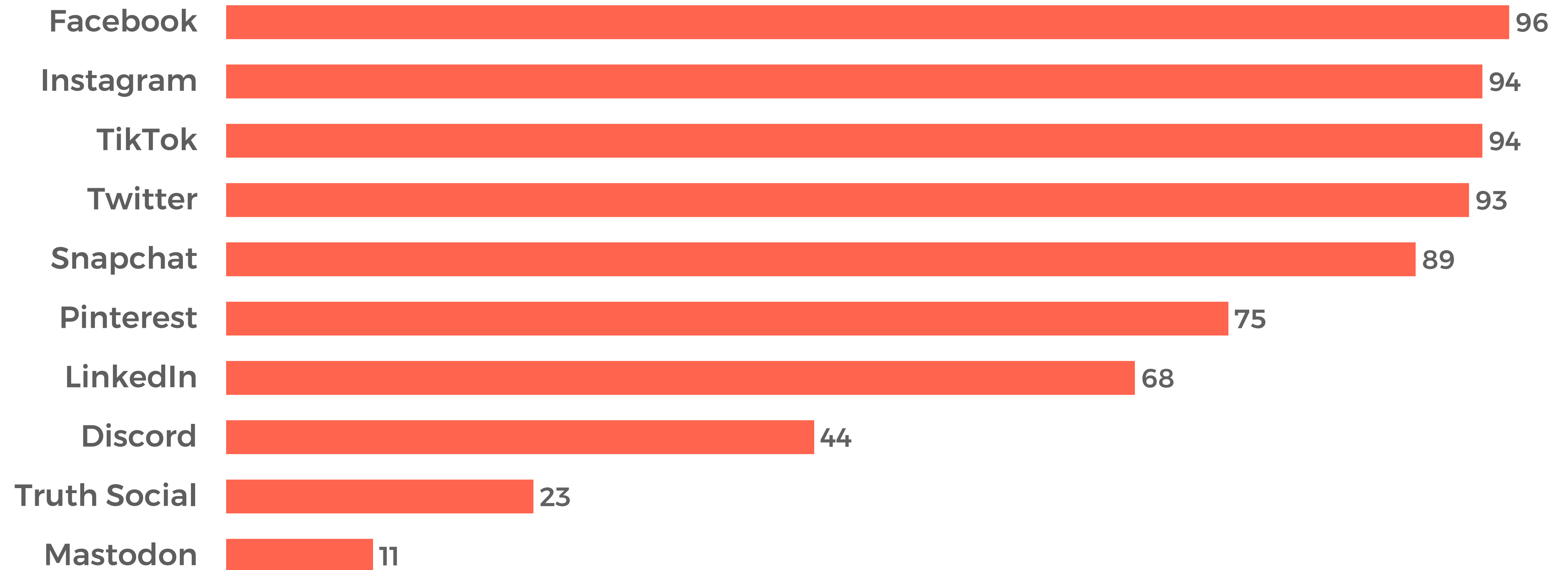


Estimated
269 Million

Social Media Brand Awareness

TOTAL U.S. POPULATION 12+

% AWARE OF SOCIAL MEDIA BRAND

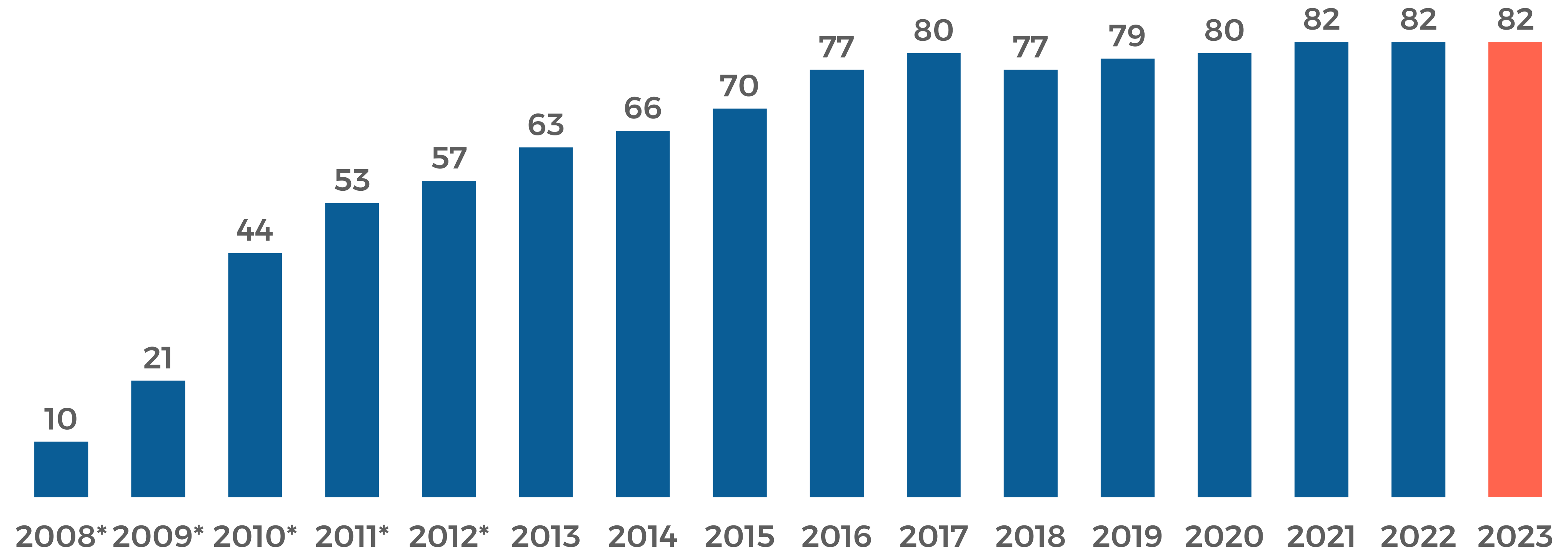


Social Media Usage

TOTAL U.S. POPULATION 12+

% USING SOCIAL MEDIA

Estimated
235 Million



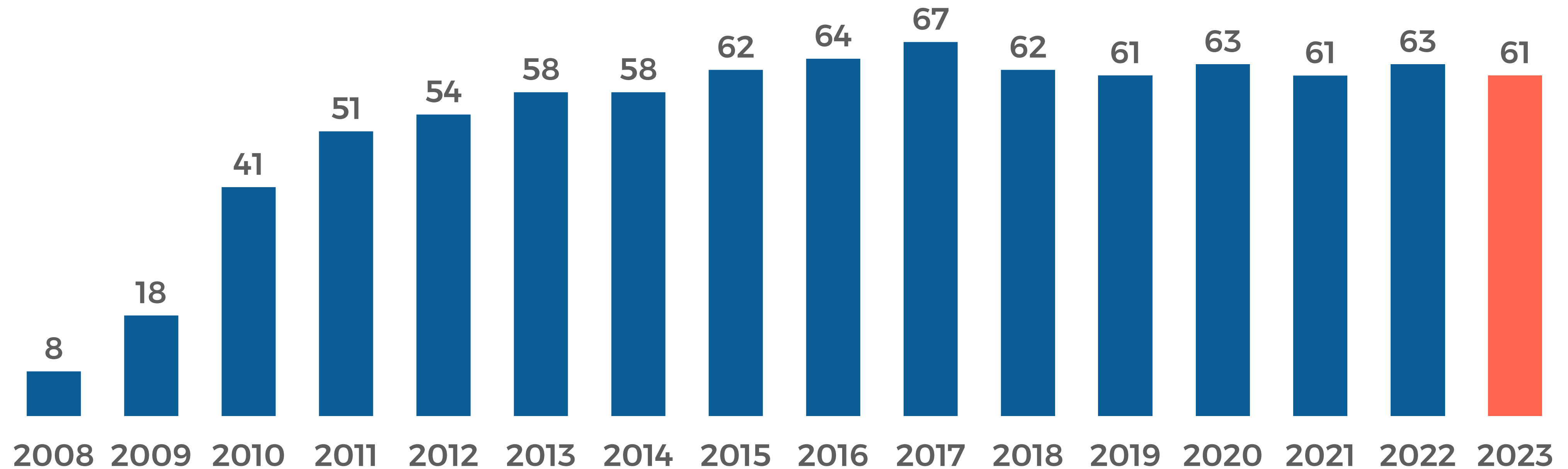
*2008-2012: EVER USE FACEBOOK, TWITTER, OR LINKEDIN

Facebook Usage

TOTAL U.S. POPULATION 12+

% USING FACEBOOK

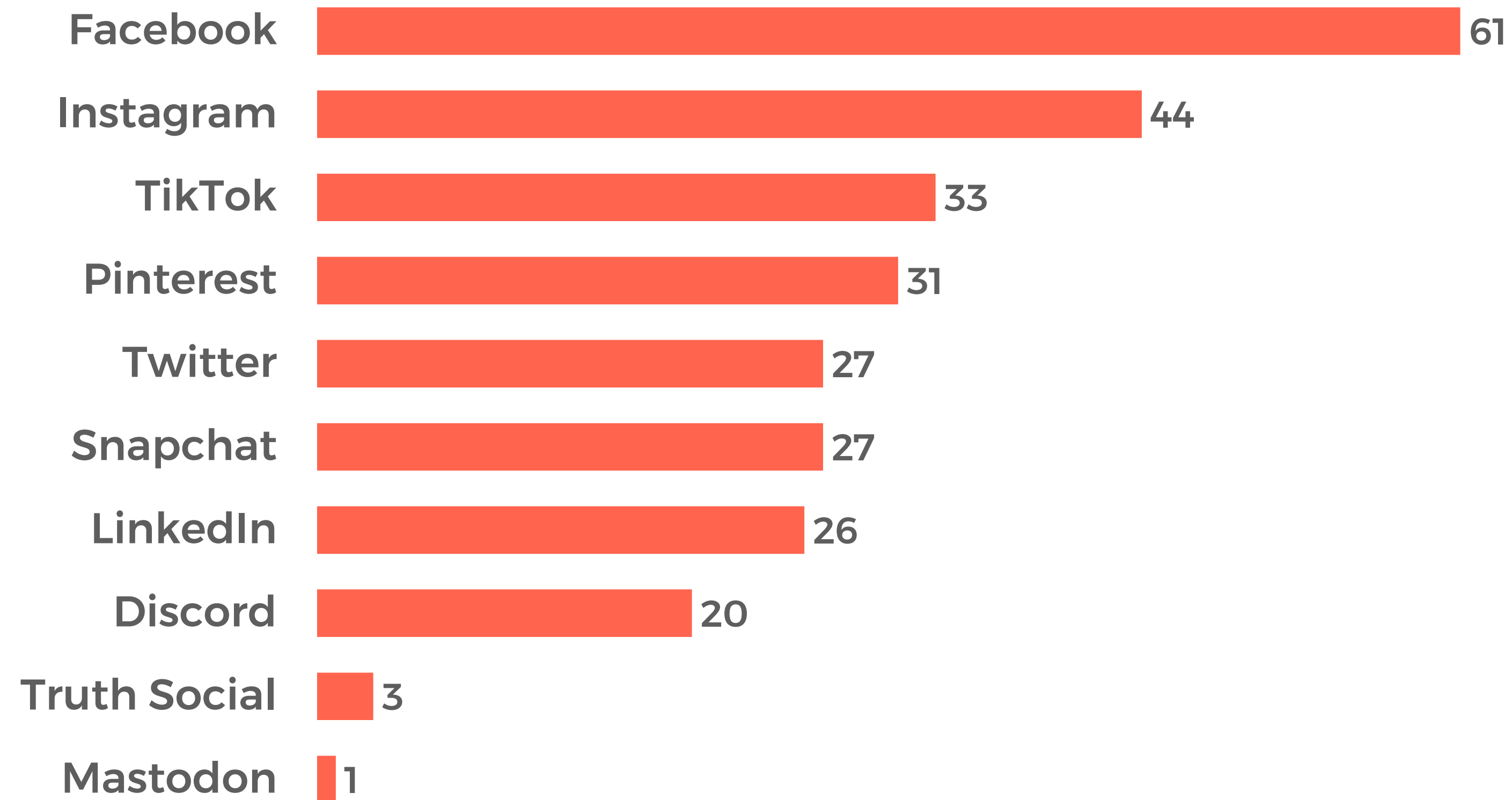
Estimated
174 Million



Social Media Brand Usage

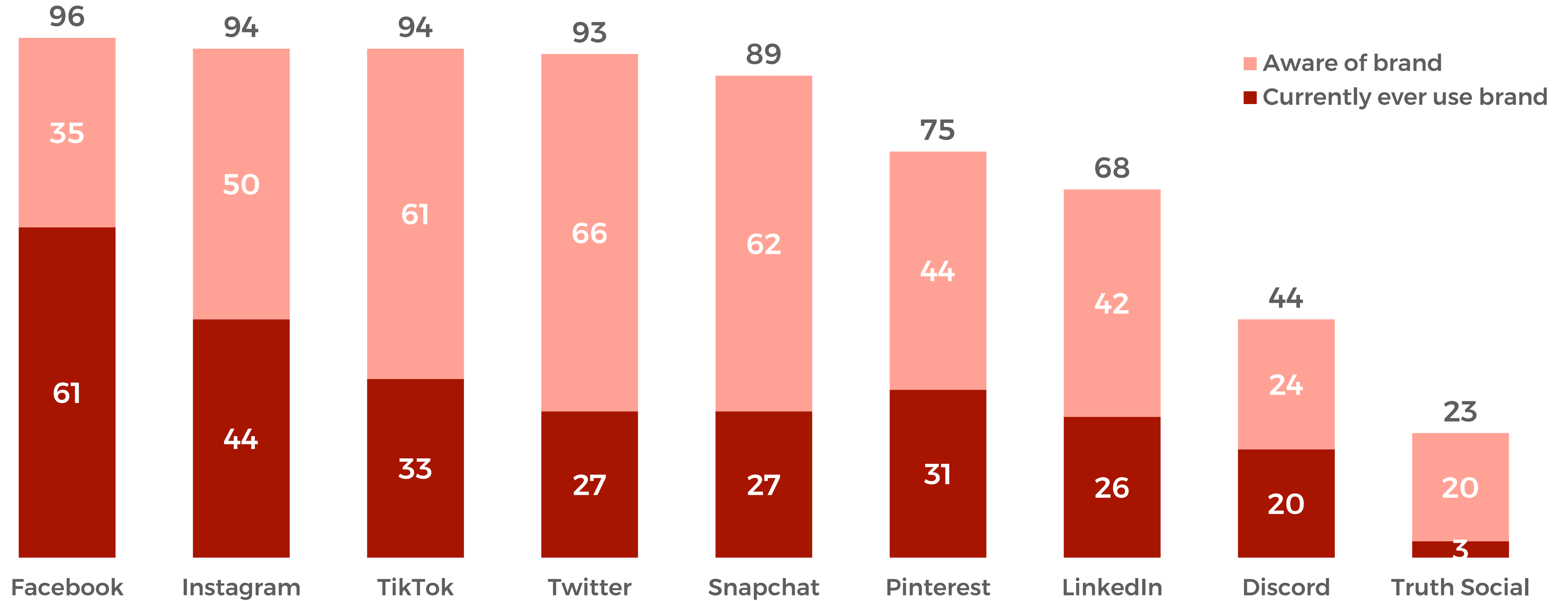
TOTAL U.S. POPULATION 12+

% USING SOCIAL MEDIA BRAND



Social Media Brand Awareness vs. Usage

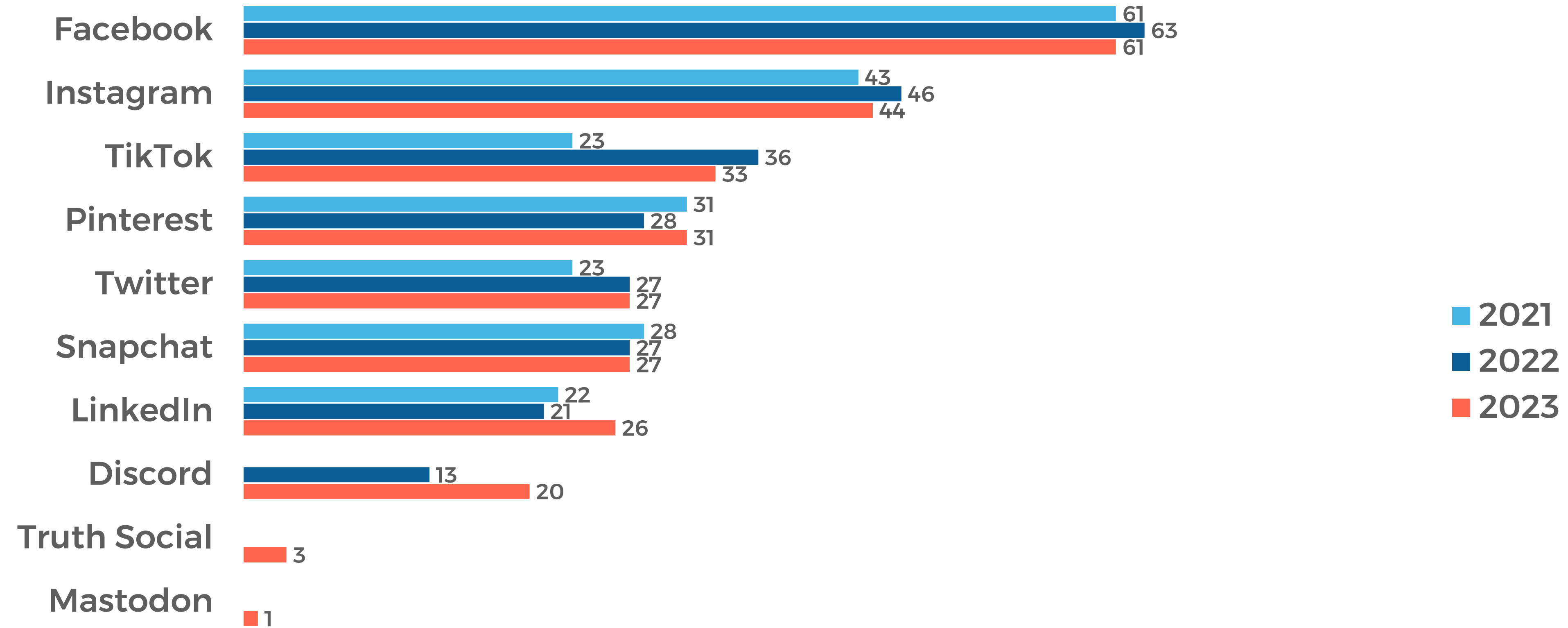
TOTAL U.S. POPULATION 12+



Social Media Brand Usage

TOTAL U.S. POPULATION 12+

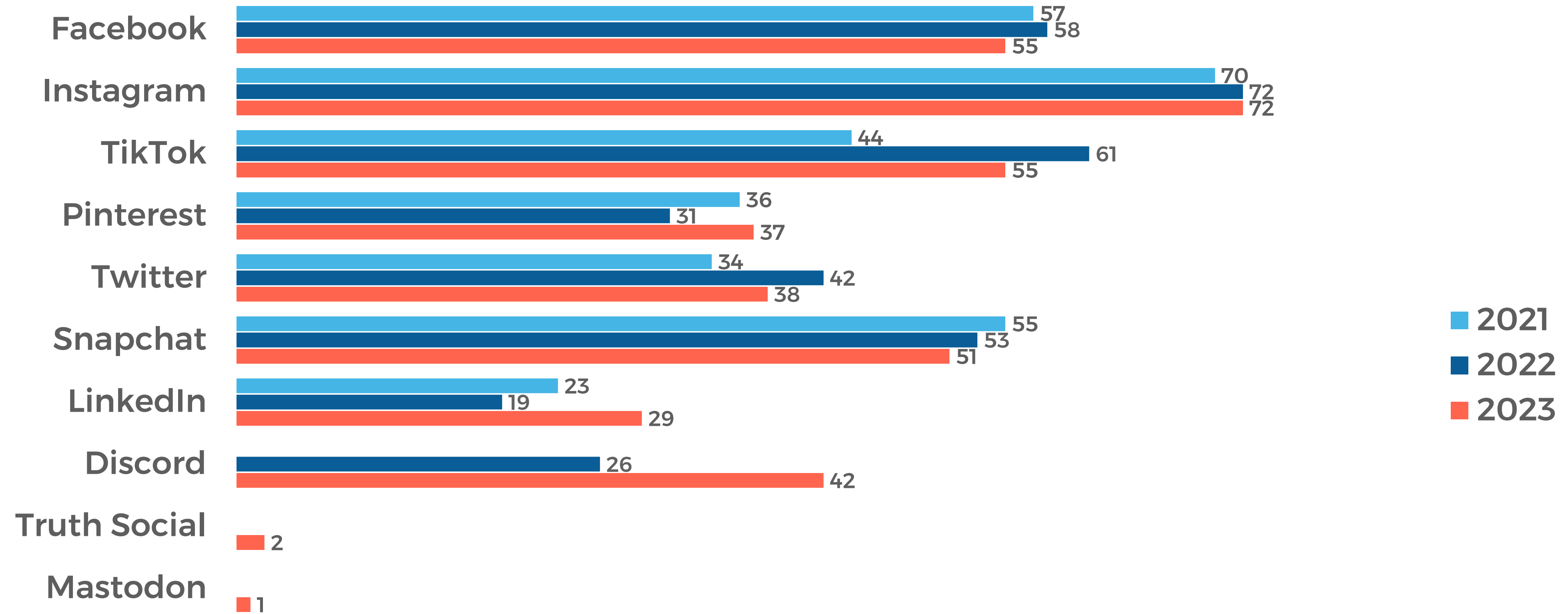
% USING SOCIAL MEDIA BRAND



Social Media Brand Usage (Age 12-34)

U.S. POPULATION

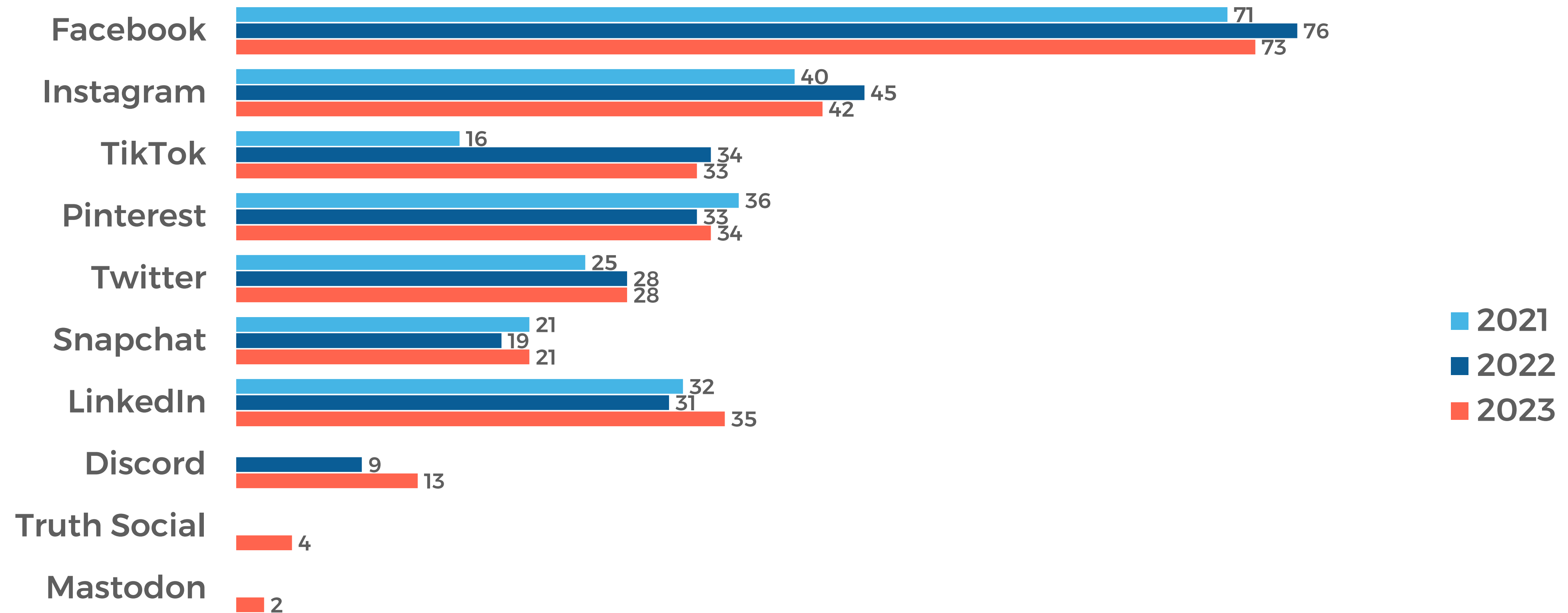
% USING SOCIAL MEDIA BRAND



Social Media Brand Usage (Age 35-54)

U.S. POPULATION

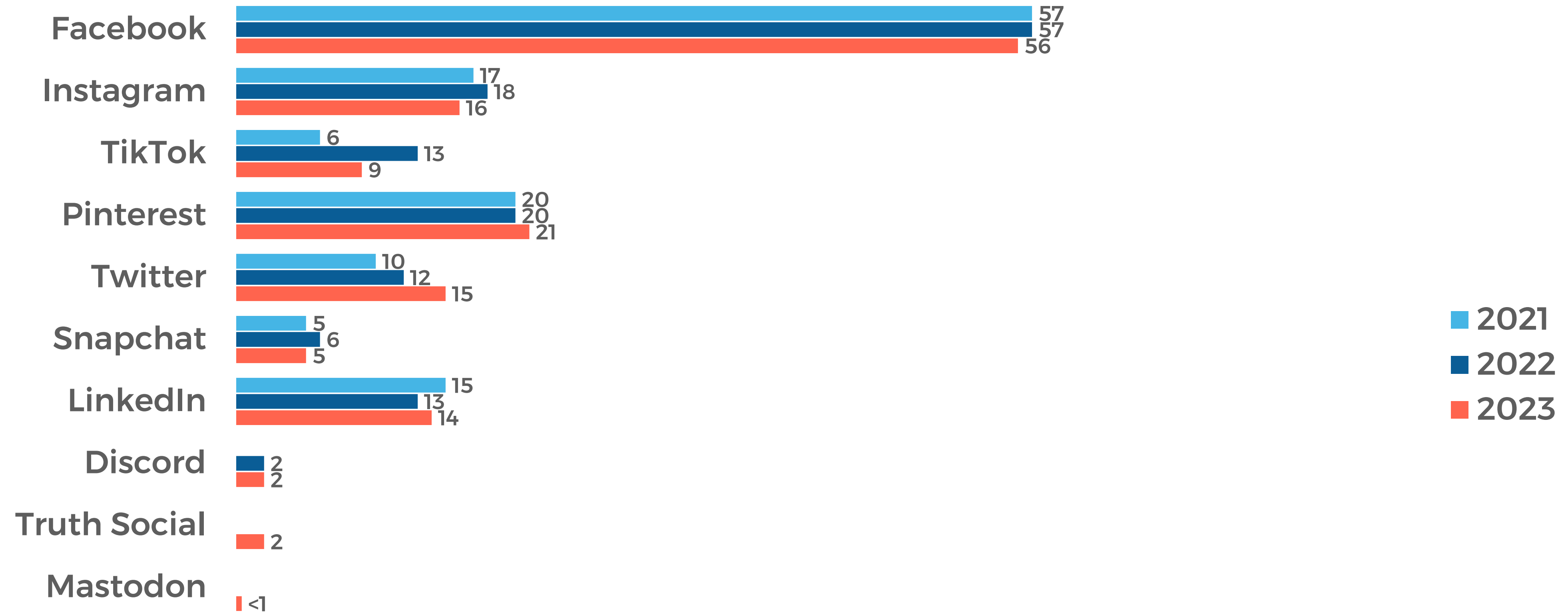
% USING SOCIAL MEDIA BRAND



Social Media Brand Usage (Age 55+)

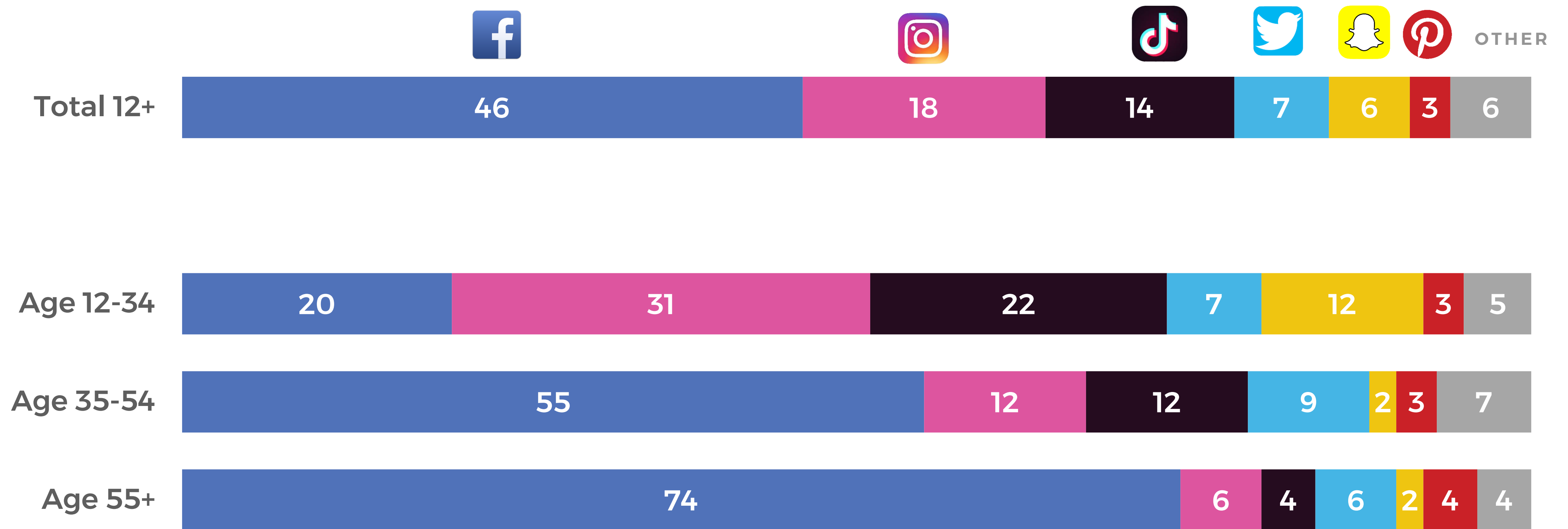
U.S. POPULATION

% USING SOCIAL MEDIA BRAND



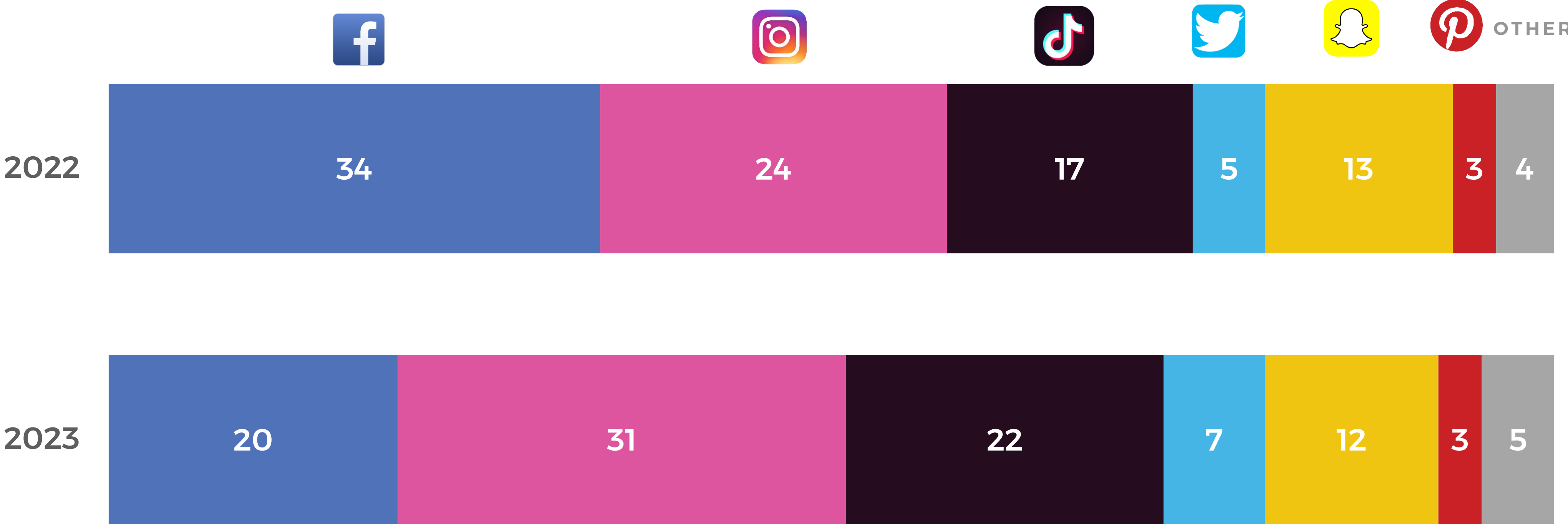
Social Media Brand Used Most Often

BASE: U.S. SOCIAL MEDIA USERS



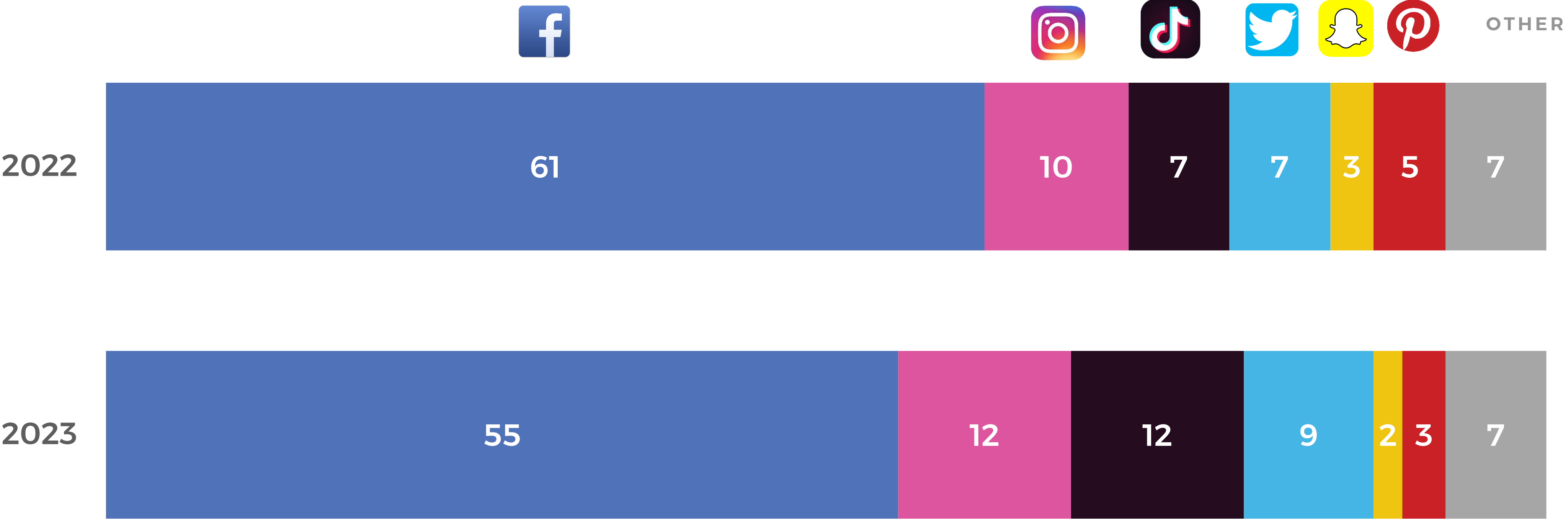
Social Media Brand Used Most Often (Age 12-34)

BASE: U.S. SOCIAL MEDIA USERS



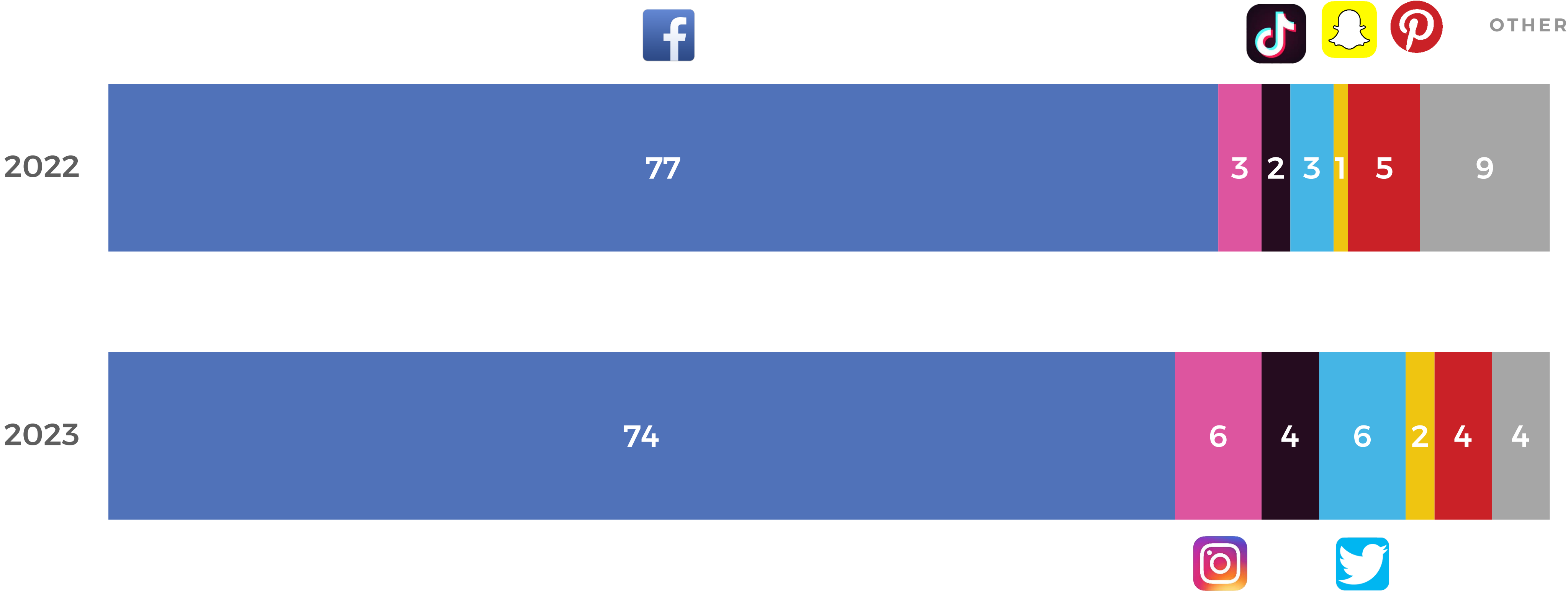
Social Media Brand Used Most Often (Age 35-54)

BASE: U.S. SOCIAL MEDIA USERS



Social Media Brand Used Most Often (Age 55+)

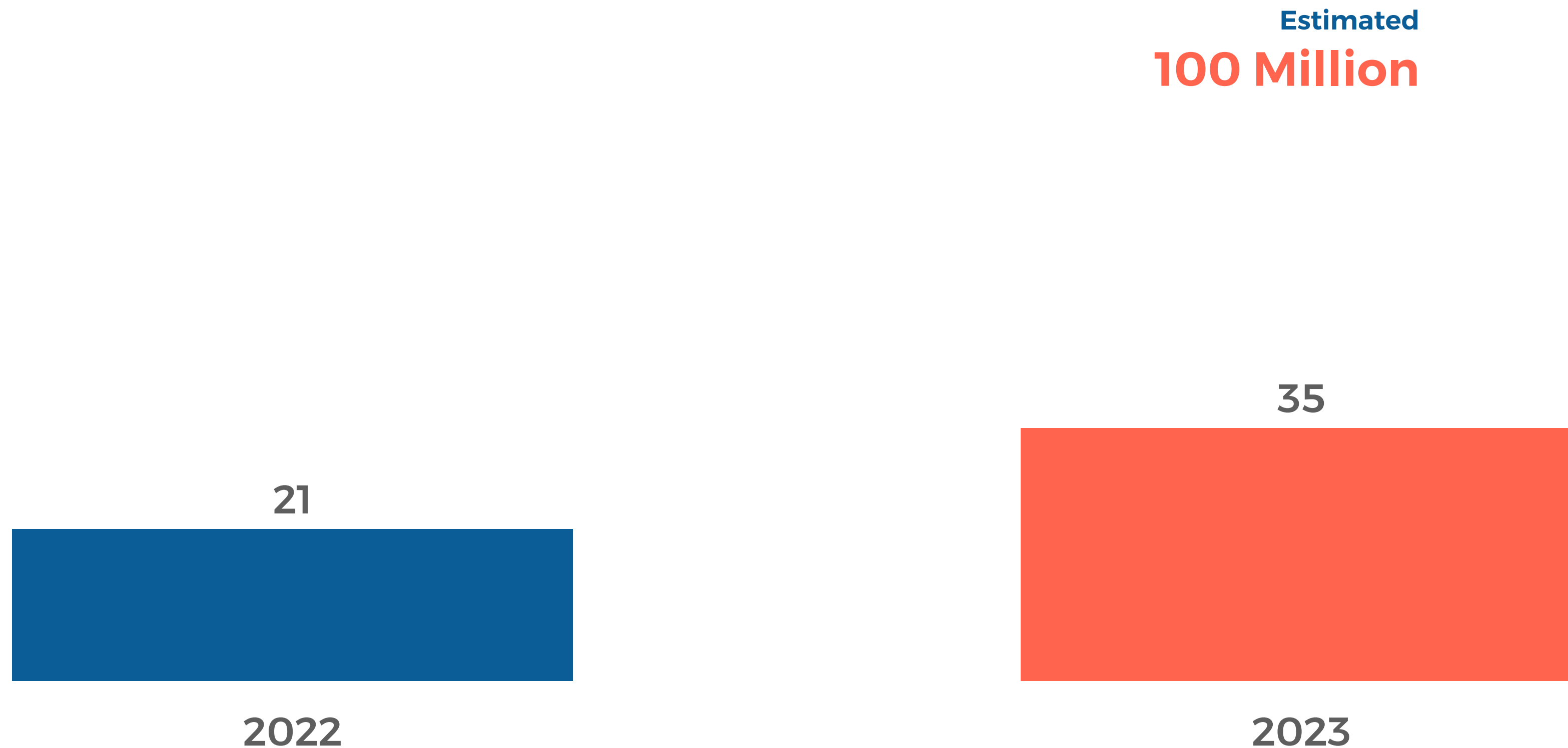
BASE: U.S. SOCIAL MEDIA USERS



Audio-Based Social Media Service Awareness

TOTAL U.S. POPULATION 12+

% AWARE OF SPOTIFY LIVE, TWITTER SPACES, CLUBHOUSE, OR AMAZON AMP

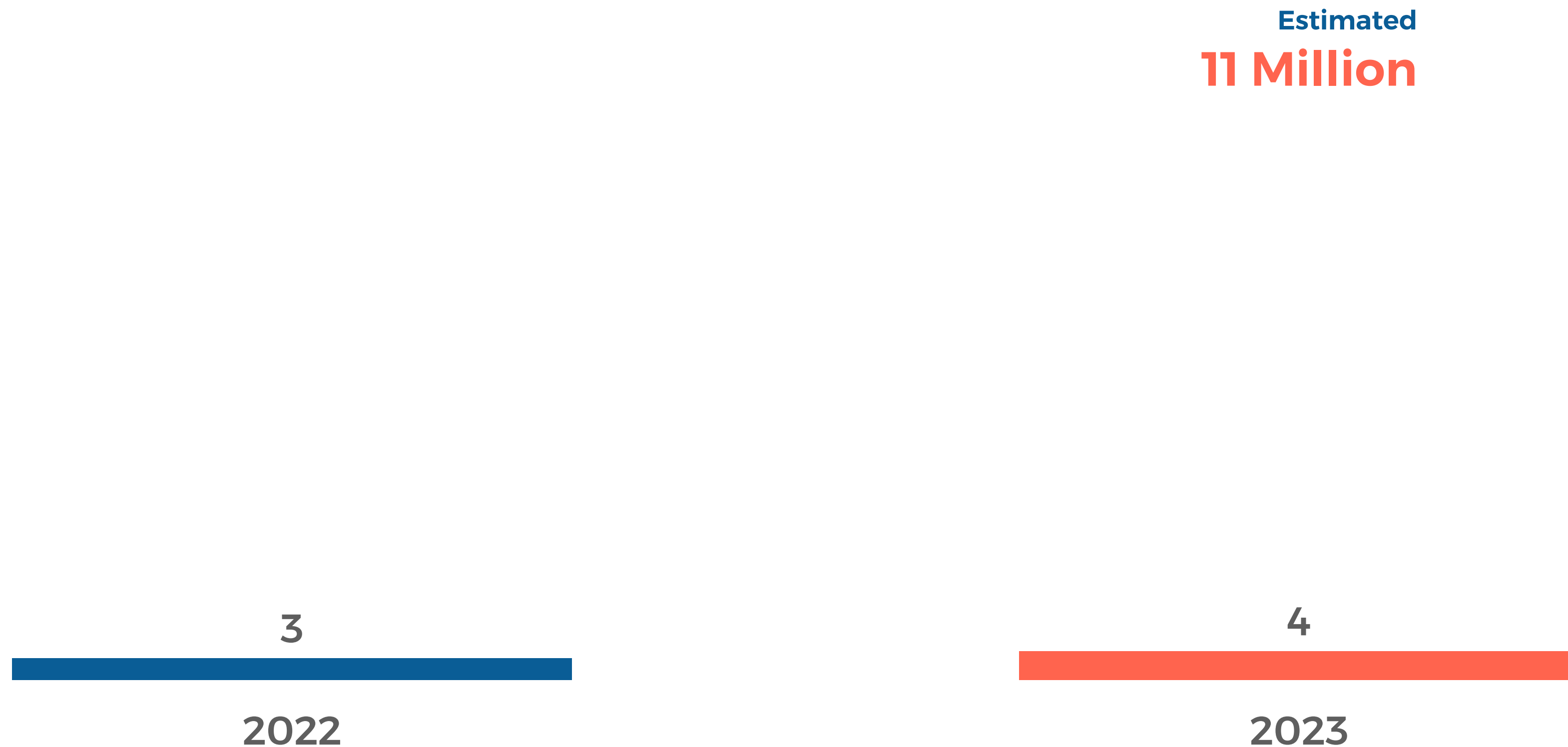


**2022 INCLUDES SPOTIFY LIVE, TWITTER SPACES, AND CLUBHOUSE*

Audio-Based Social Media Service Usage

TOTAL U.S. POPULATION 12+

% USING SPOTIFY LIVE, TWITTER SPACES, CLUBHOUSE, OR AMAZON AMP



**2022 INCLUDES SPOTIFY LIVE, TWITTER SPACES, AND CLUBHOUSE*



 THE INFINITE DIAL® 2023

Online Audio



WONDERY



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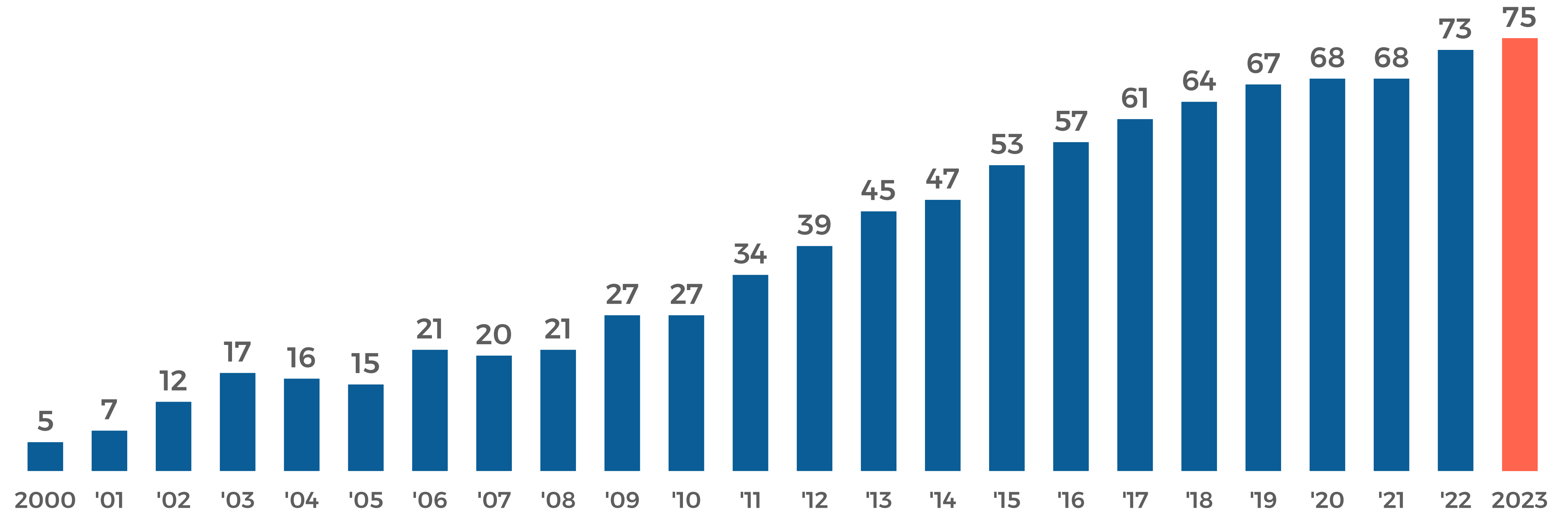
Monthly Online Audio Listening

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
214 Million

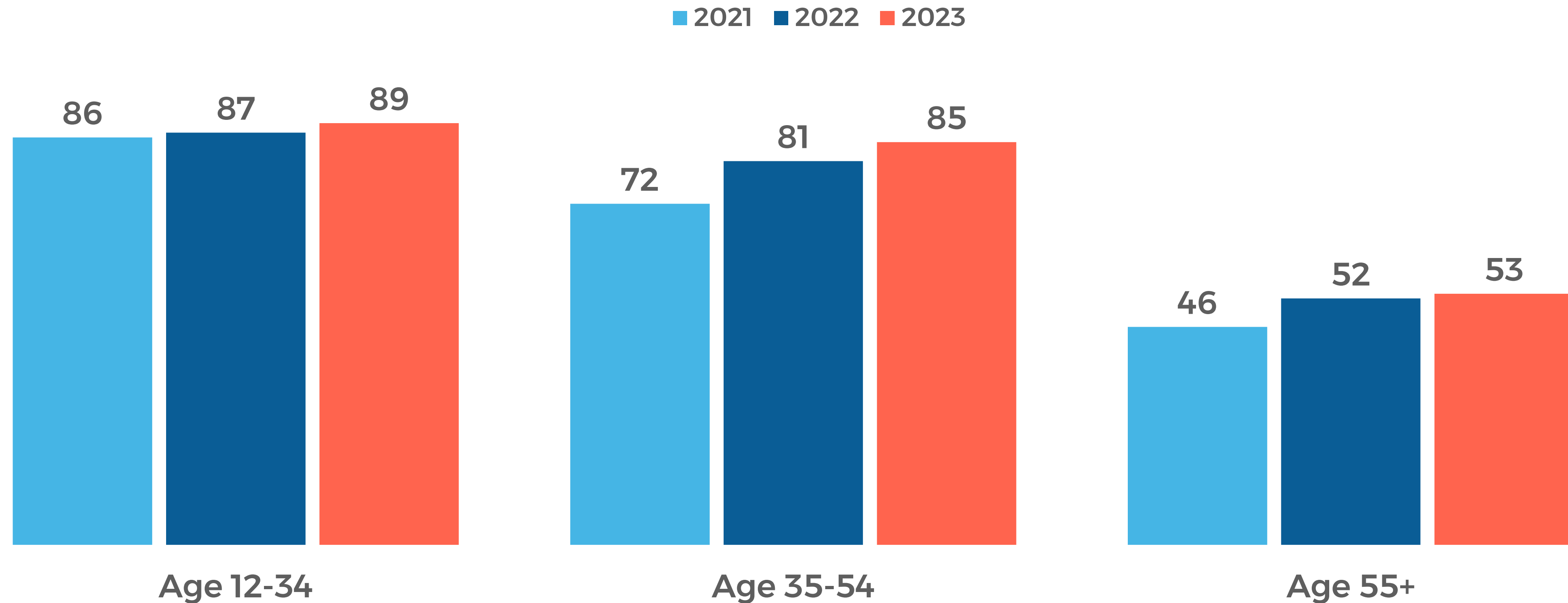


Monthly Online Audio Listening

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



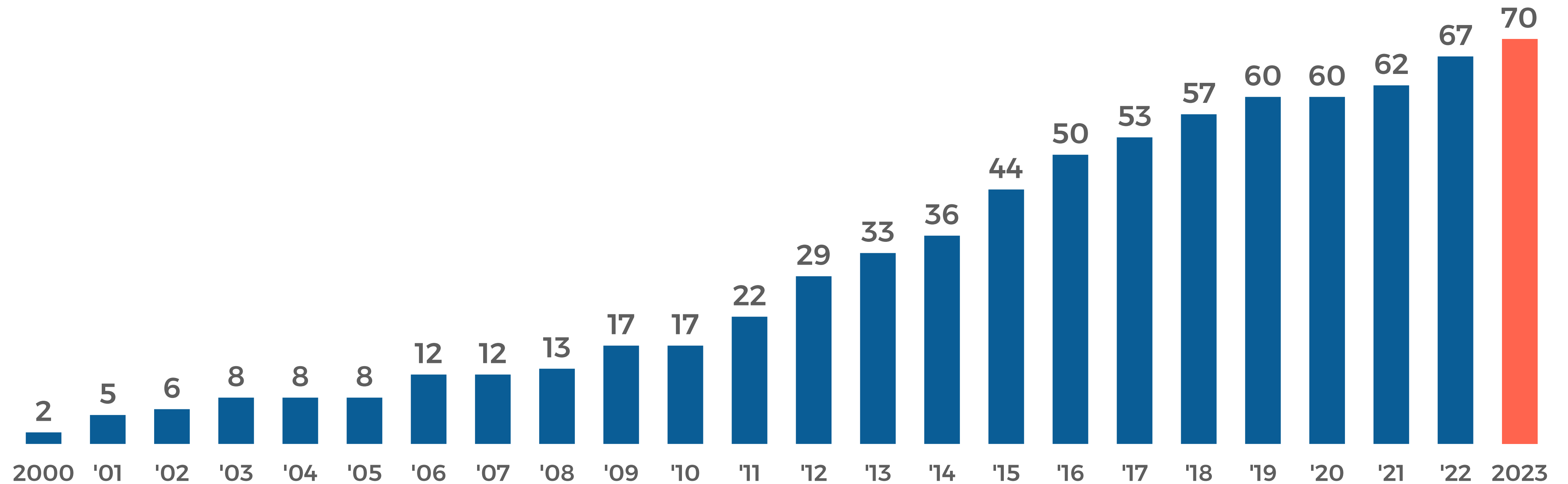
Weekly Online Audio Listening

TOTAL U.S. POPULATION 12+

% LISTENED TO ONLINE AUDIO IN LAST WEEK

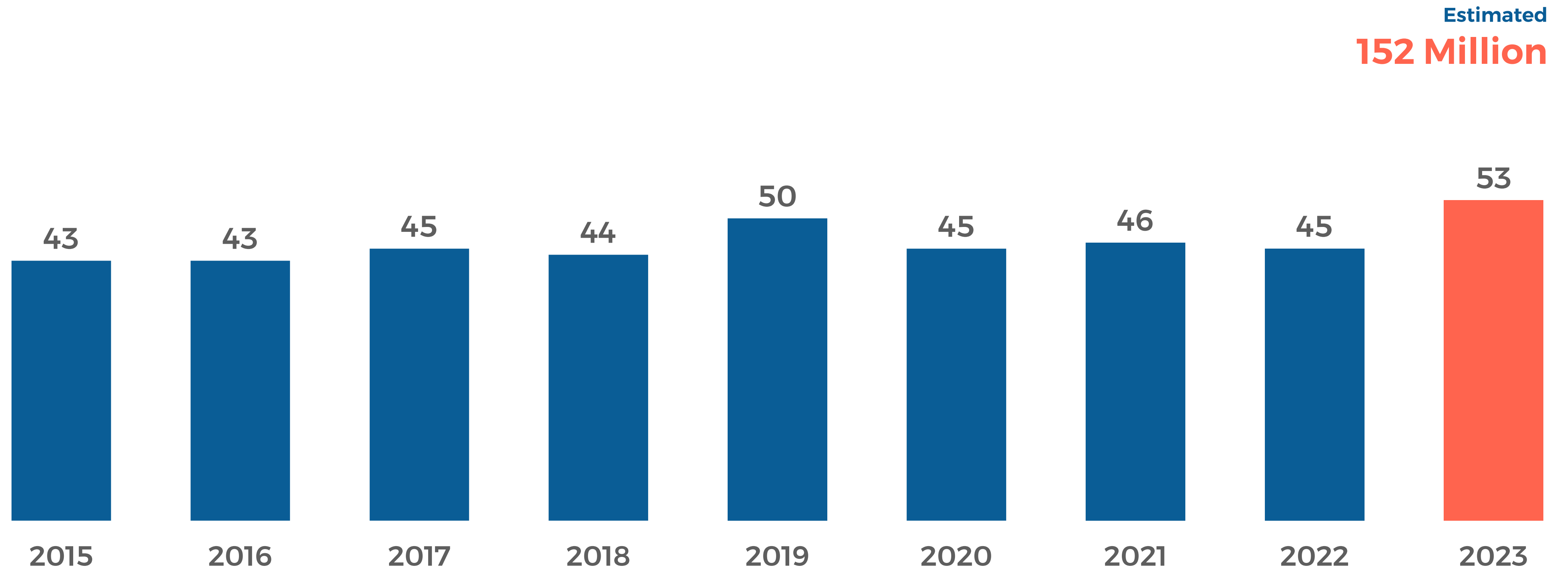
ONLINE AUDIO = LISTENING TO AM/FM RADIO STATIONS ONLINE AND/OR LISTENING TO STREAMED AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET

Estimated
200 Million



Audiobook Listening

TOTAL U.S. POPULATION 12+
% EVER LISTENED TO AN AUDIOBOOK



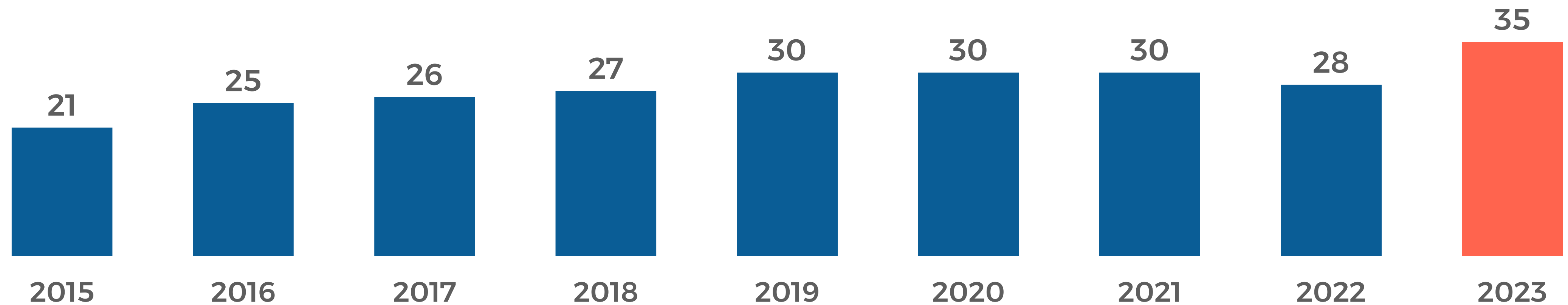
Estimated
152 Million

Audiobook Listening in Last Year

TOTAL U.S. POPULATION 12+

% LISTENED TO AN AUDIOBOOK IN THE LAST YEAR

Estimated
100 Million



 THE INFINITE DIAL® 2023

Online Audio Brands



WONDERY



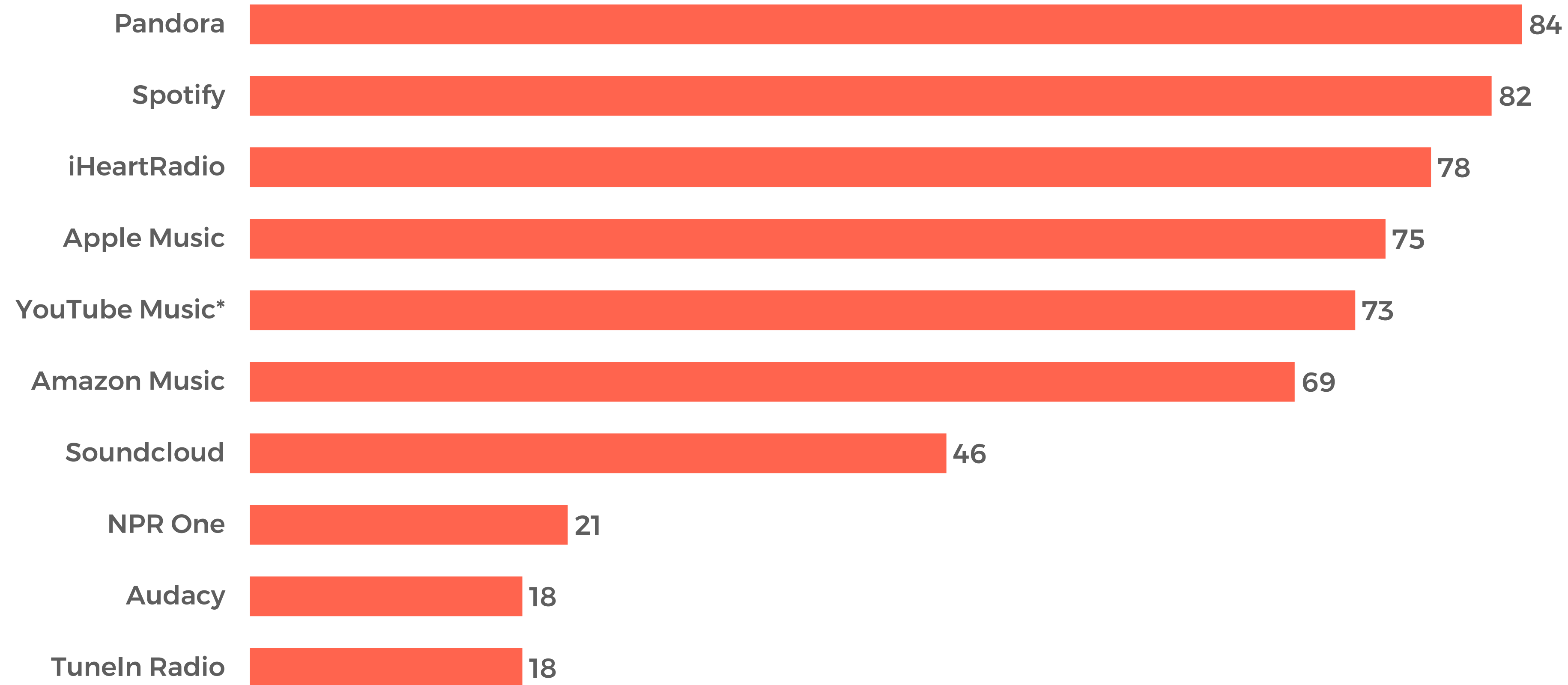
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Online Audio Brand Awareness

TOTAL U.S. POPULATION 12+

% AWARE OF ONLINE AUDIO BRAND

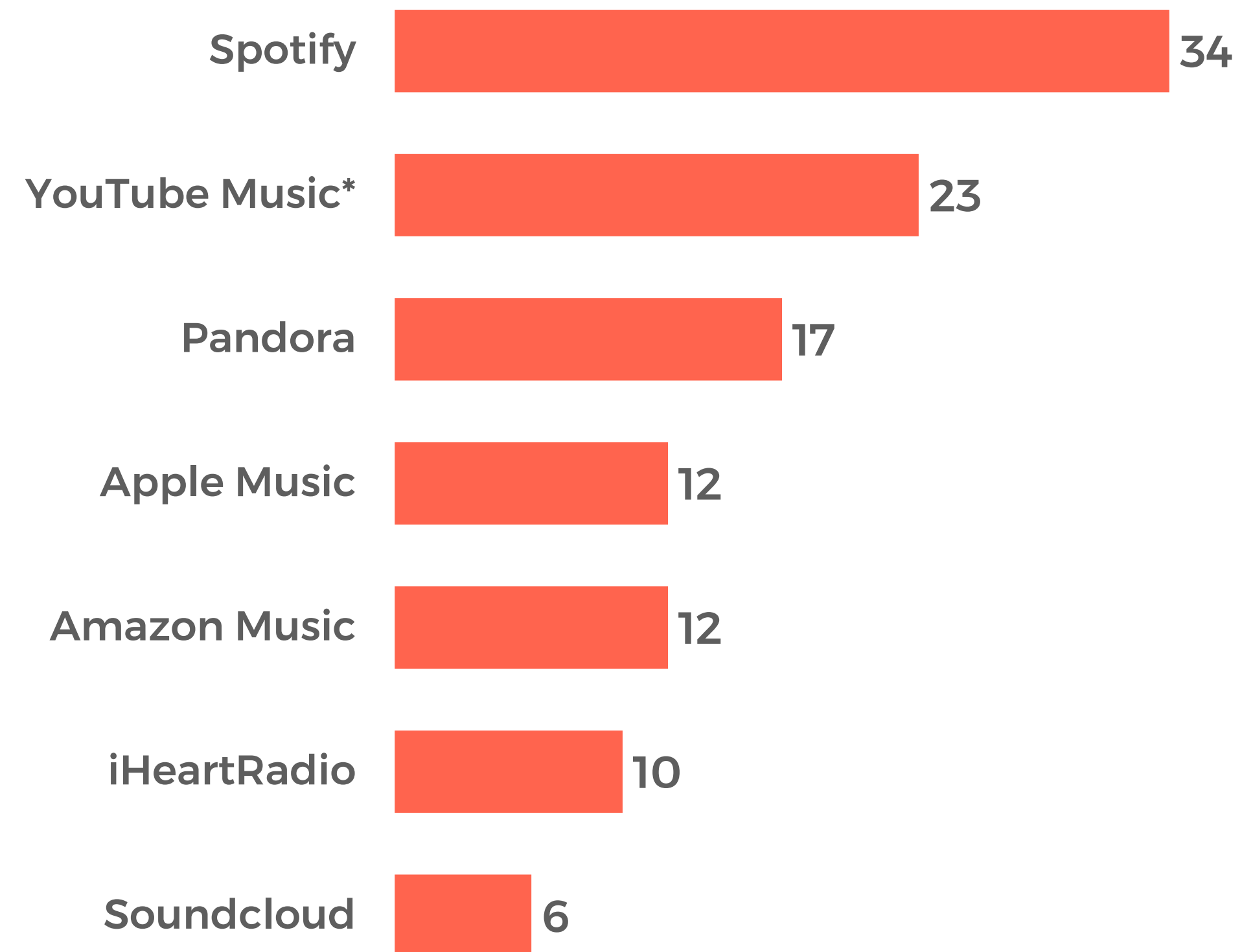


*ASKED AS: "YOUTUBE MUSIC, THE STREAMING MUSIC SERVICE FROM YOUTUBE"

Online Audio Brands Listened to in Last Month

TOTAL U.S. POPULATION 12+

% LISTENED TO ONLINE AUDIO BRAND IN LAST MONTH

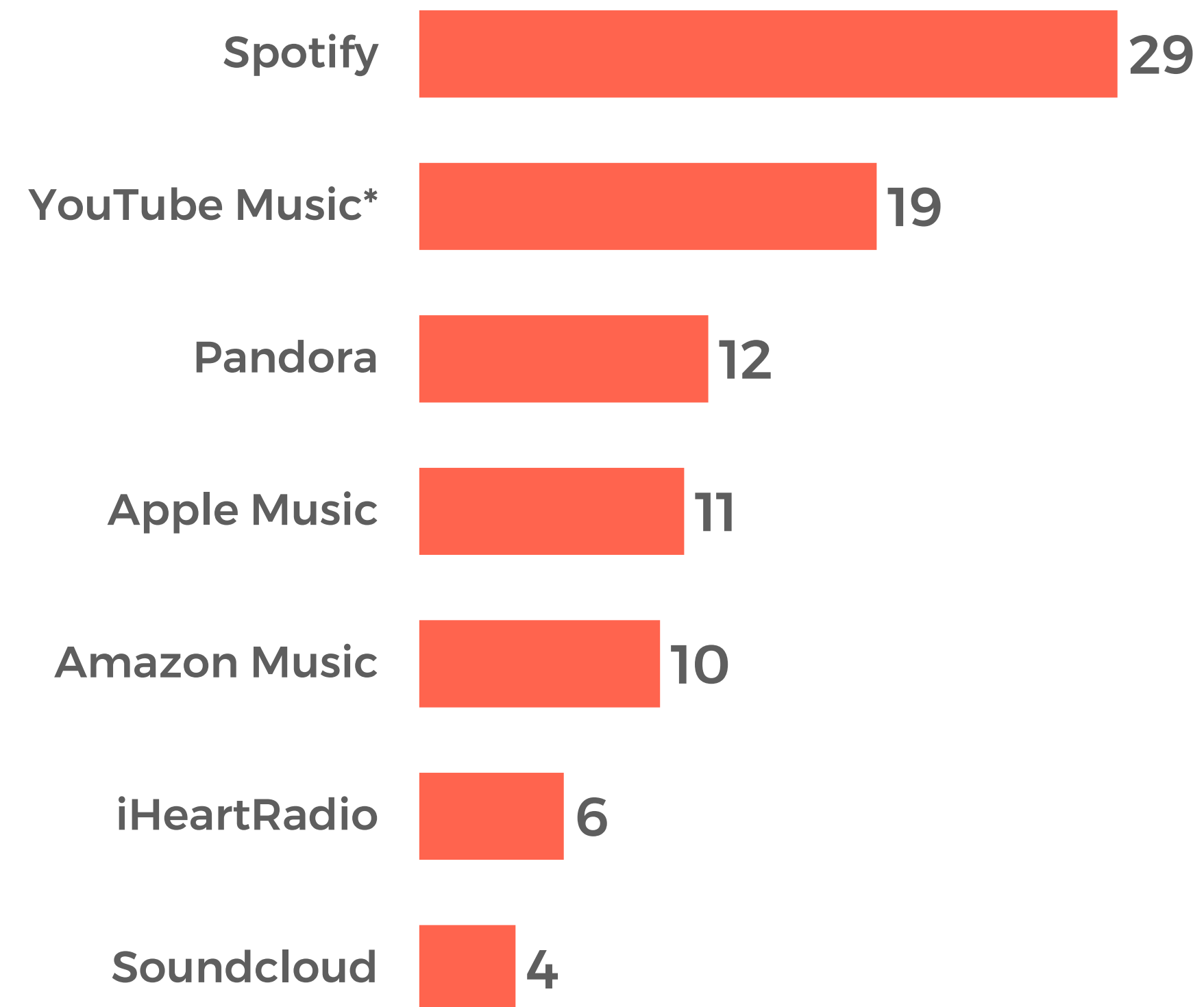


*ASKED AS: "YOUTUBE MUSIC, THE STREAMING MUSIC SERVICE FROM YOUTUBE"

Online Audio Brands Listened to in Last Week

TOTAL U.S. POPULATION 12+

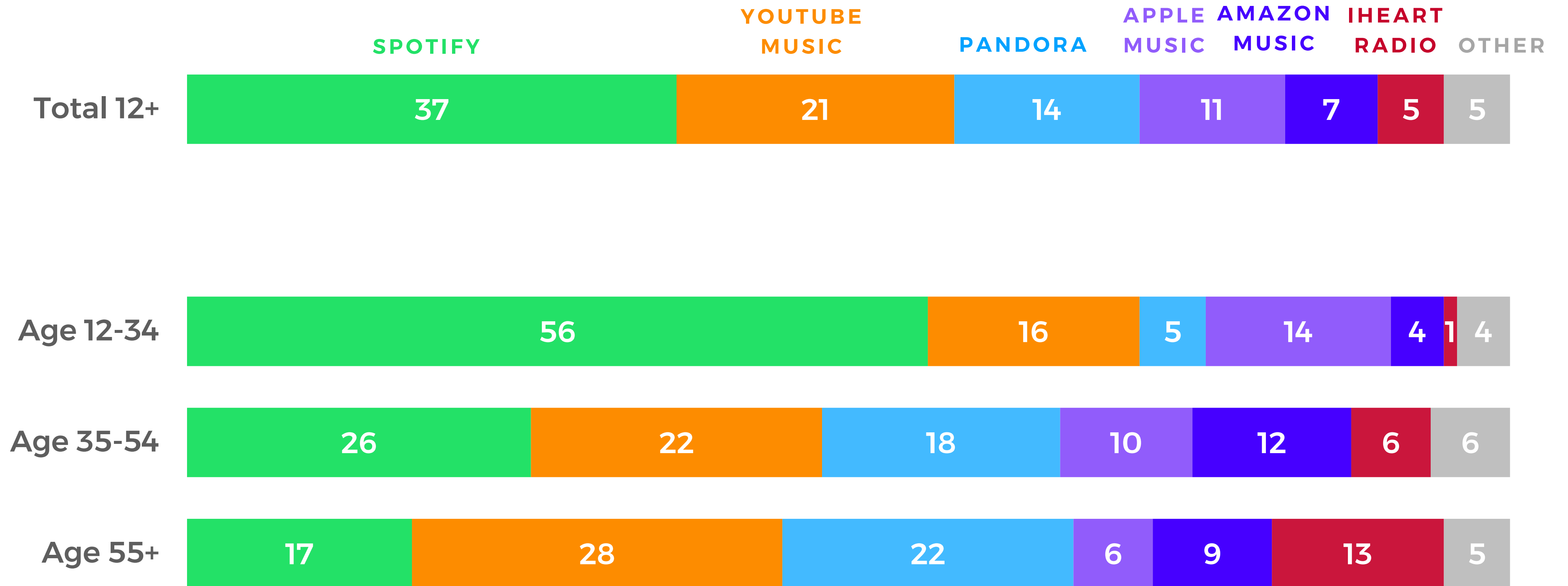
% LISTENED TO ONLINE AUDIO BRAND IN LAST WEEK



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

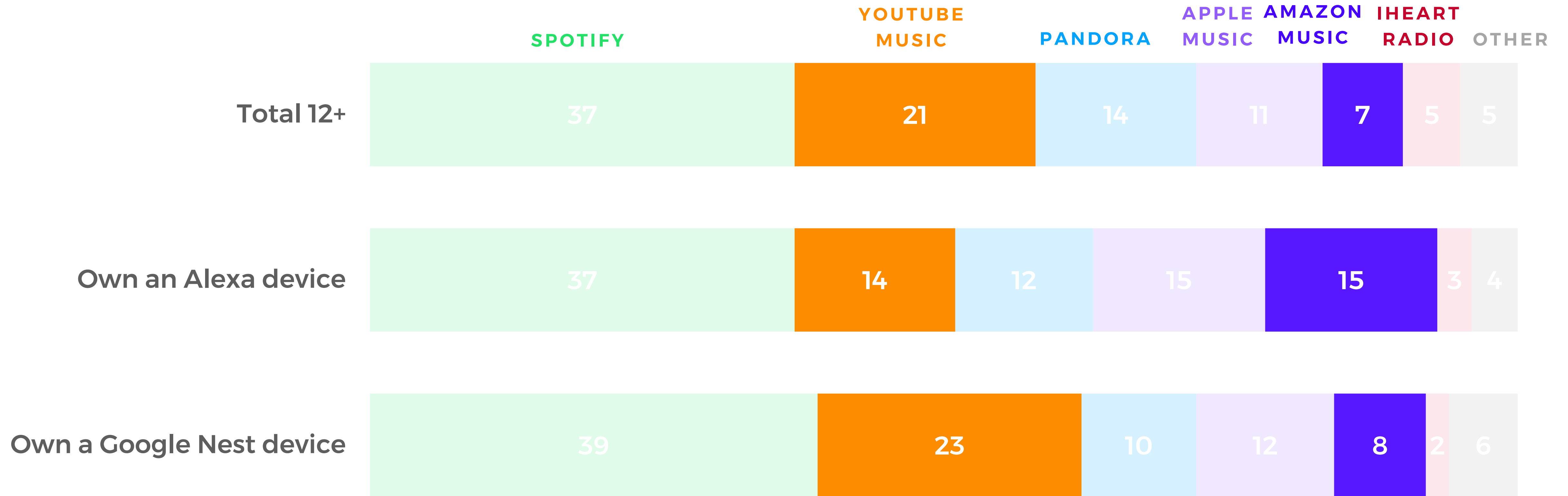
Online Audio Brand Used Most Often

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



Online Audio Brand Used Most Often

BASE: U.S. AGE 12+ SMART SPEAKER OWNERS WHO CURRENTLY EVER USE ANY ONLINE AUDIO BRAND

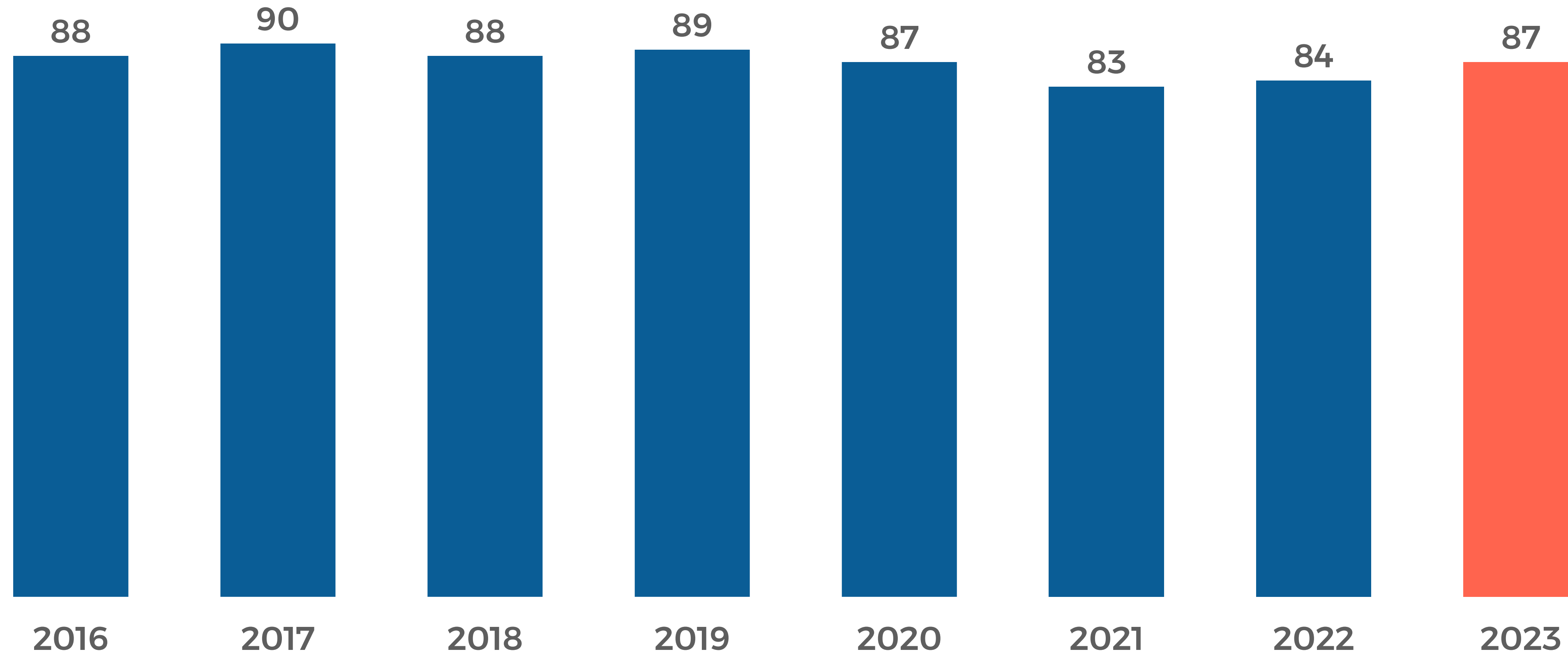


In-Car Media

Driven/Ridden in Car in Last Month

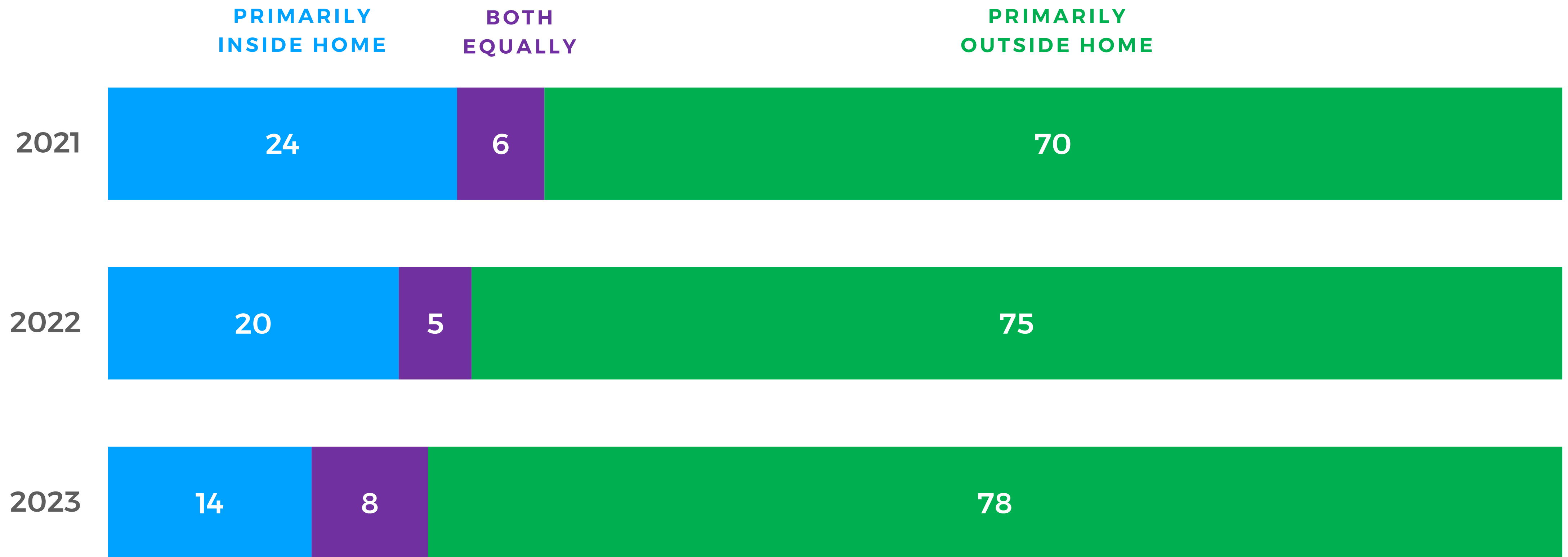
BASE: U.S. AGE 18+

% DRIVING OR RIDING IN CAR/VEHICLE IN LAST MONTH



Primary Work Location

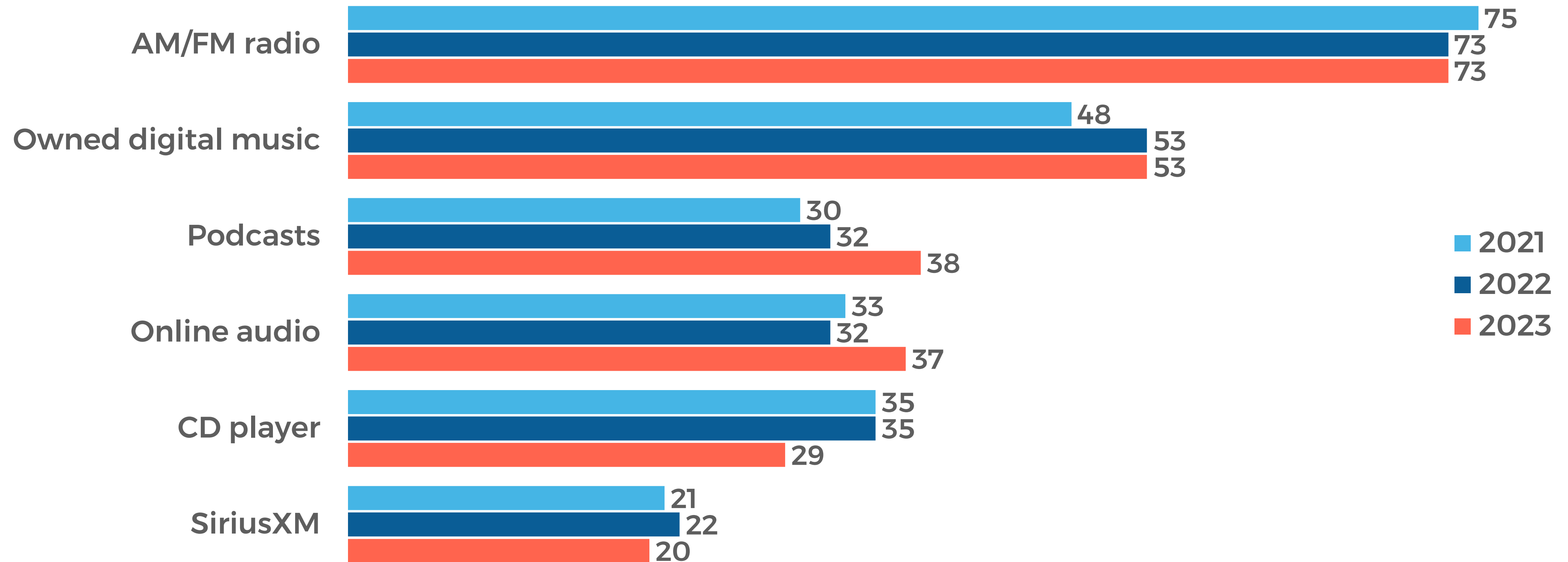
BASE: U.S. AGE 18+ WHO ARE CURRENTLY EMPLOYED FULL-TIME OR PART-TIME; 54%



Audio Sources Currently Ever Used in Car

BASE: U.S. AGE 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 87%

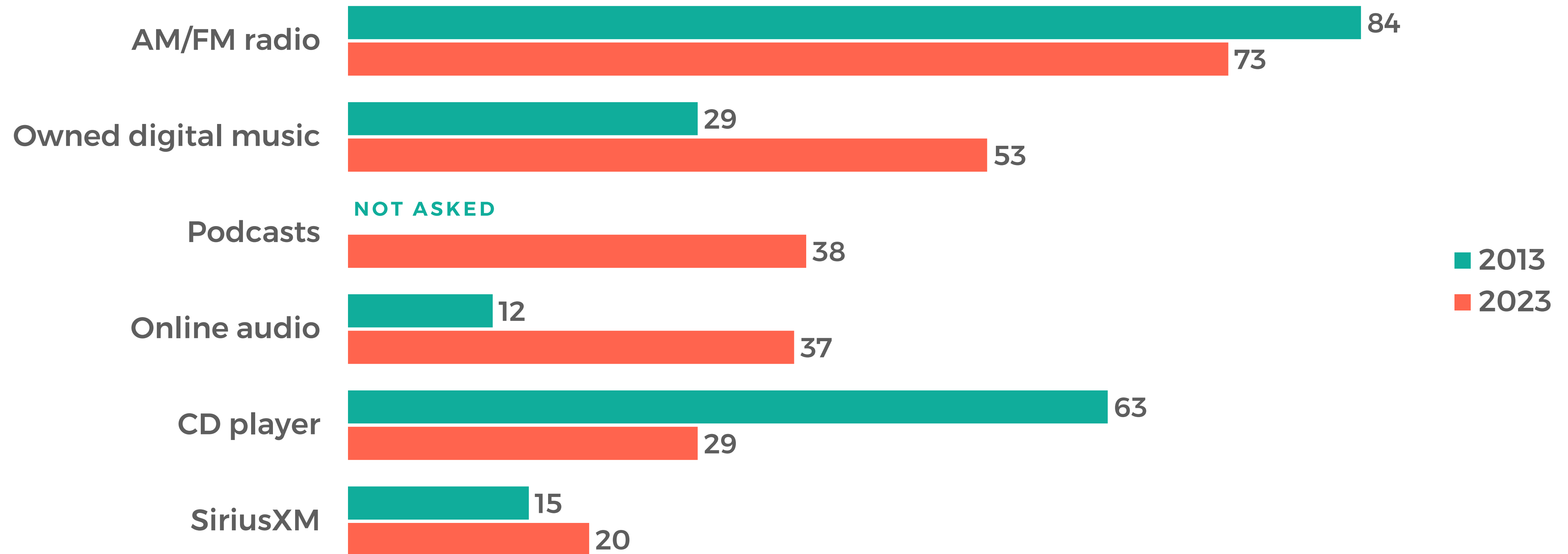
% USING AUDIO SOURCE IN CAR



Audio Sources Currently Ever Used in Car

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

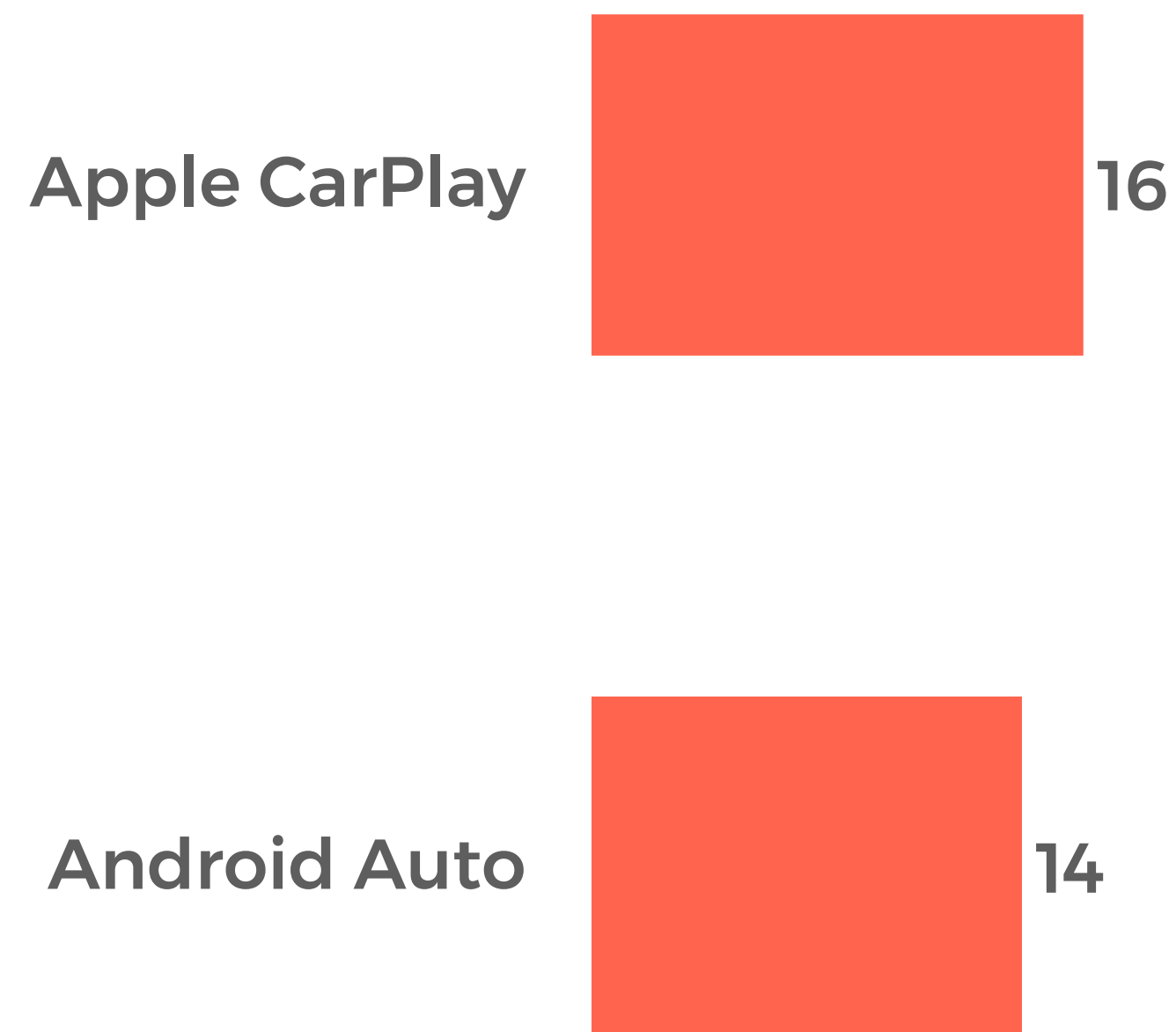
% USING AUDIO SOURCE IN CAR



Mobile Operating Systems in Primary Vehicle

BASE: U.S. AGE 18+, DRIVEN/RIDDEN IN CAR IN LAST MONTH, 87%

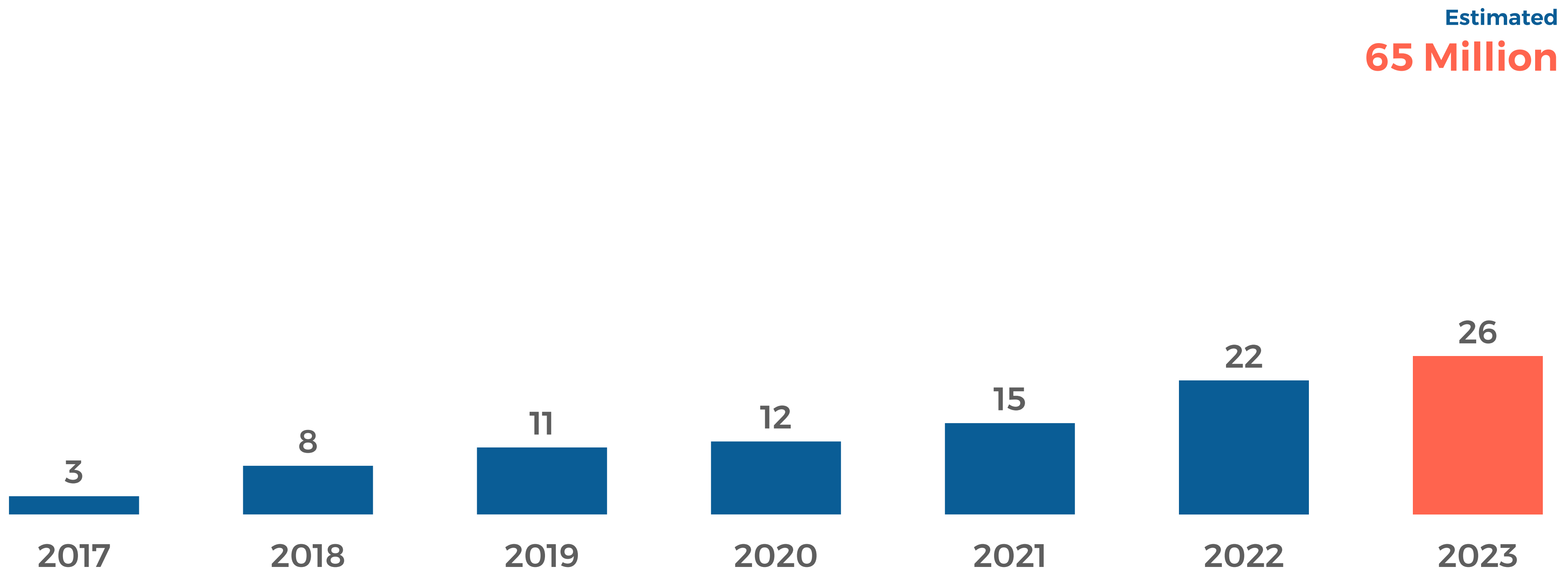
% HAVE SYSTEM IN PRIMARY VEHICLE



Mobile Operating Systems in Primary Vehicle

BASE: U.S. AGE 18+, DRIVEN/RIDDEN IN CAR IN LAST MONTH, 87%

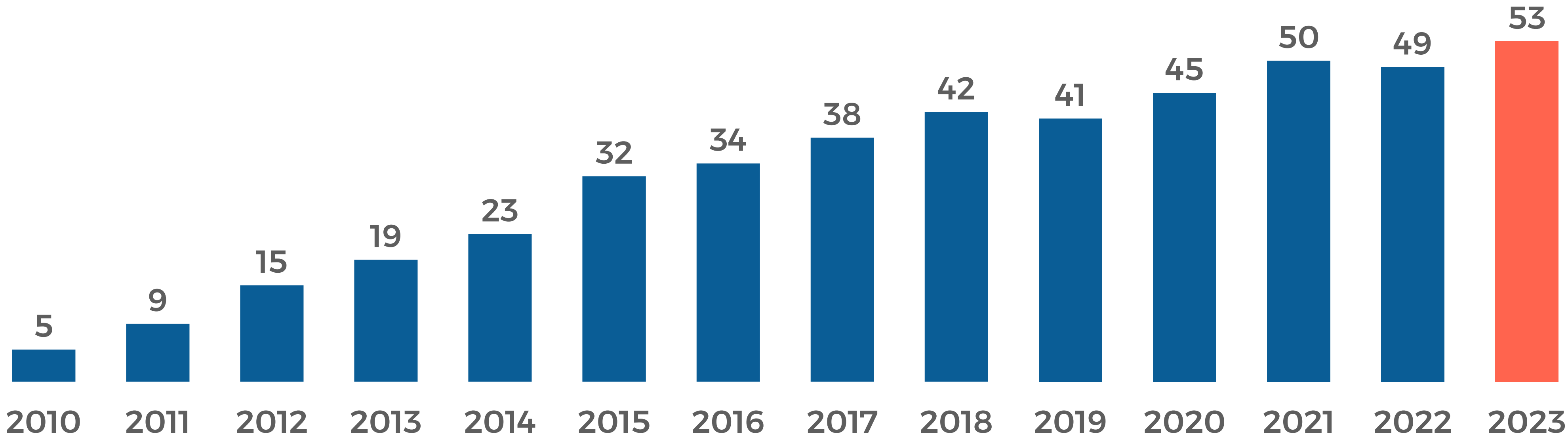
% HAVE APPLE CARPLAY OR ANDROID AUTO IN PRIMARY VEHICLE



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



 THE INFINITE DIAL® 2023

Podcasting



WONDERY



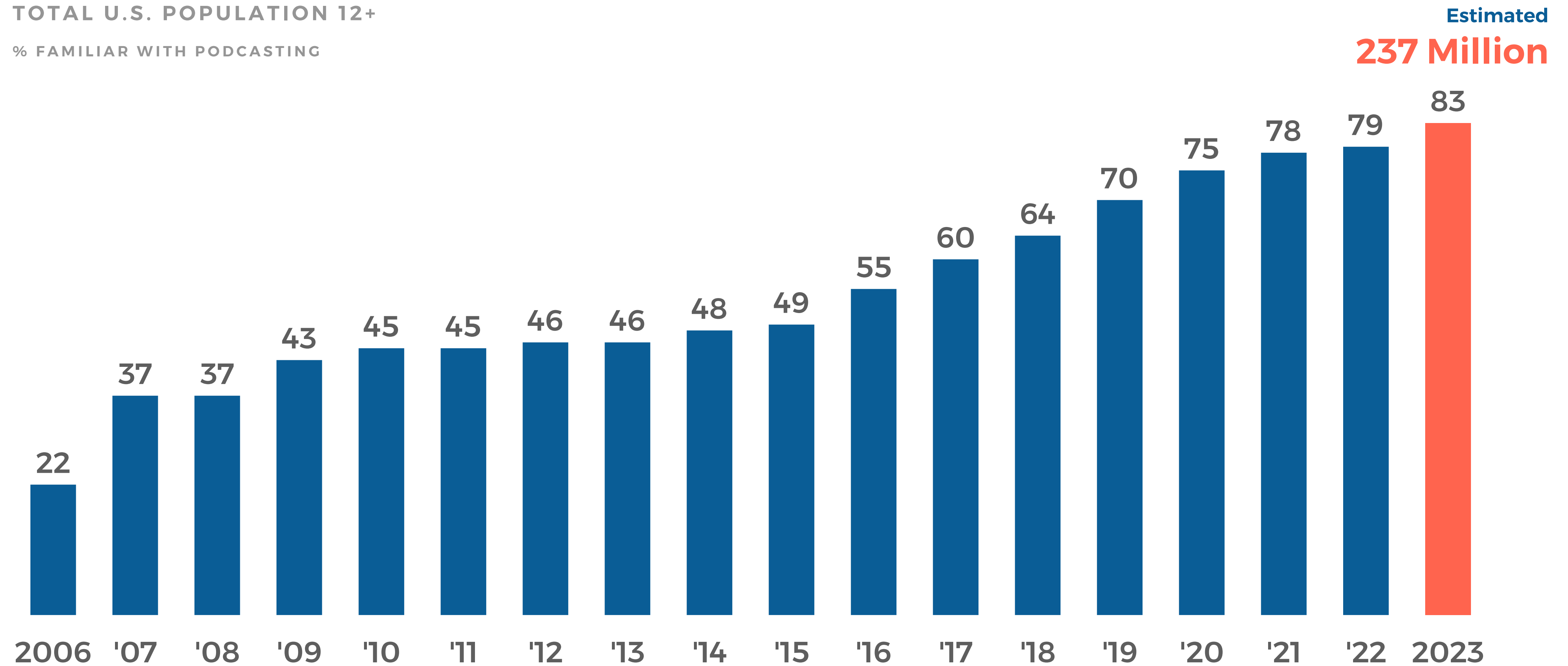
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Podcasting Familiarity

TOTAL U.S. POPULATION 12+

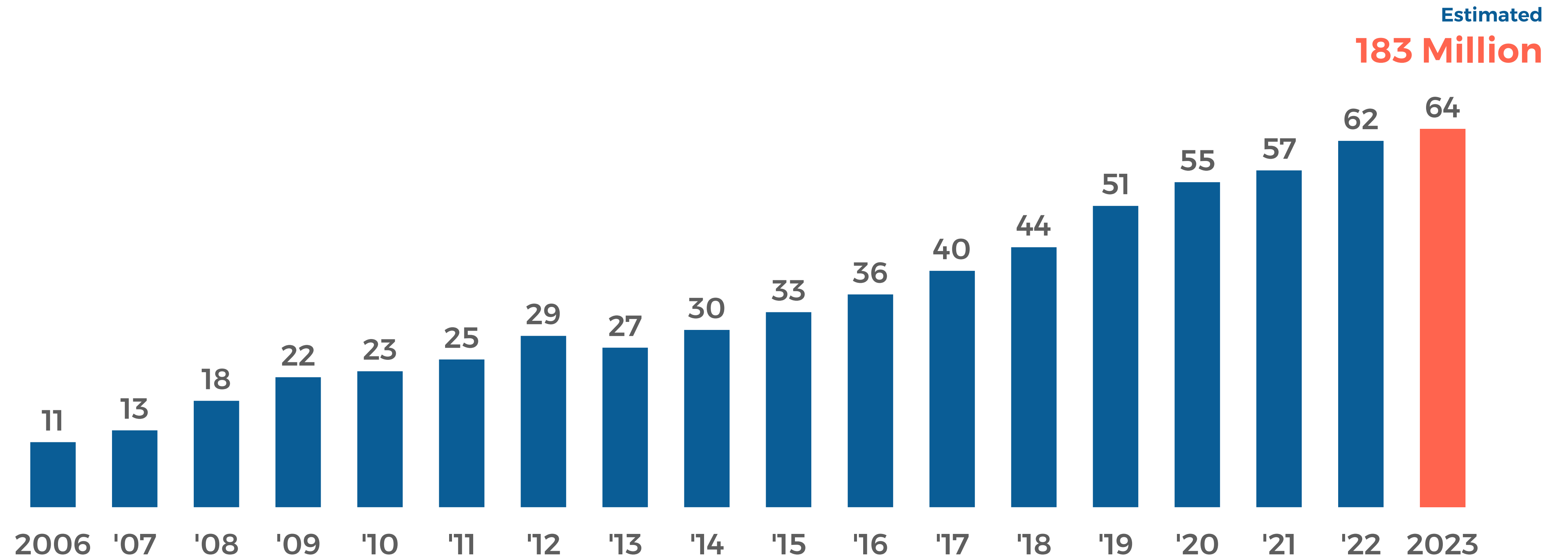
% FAMILIAR WITH PODCASTING



Podcasting Listening

TOTAL U.S. POPULATION 12+

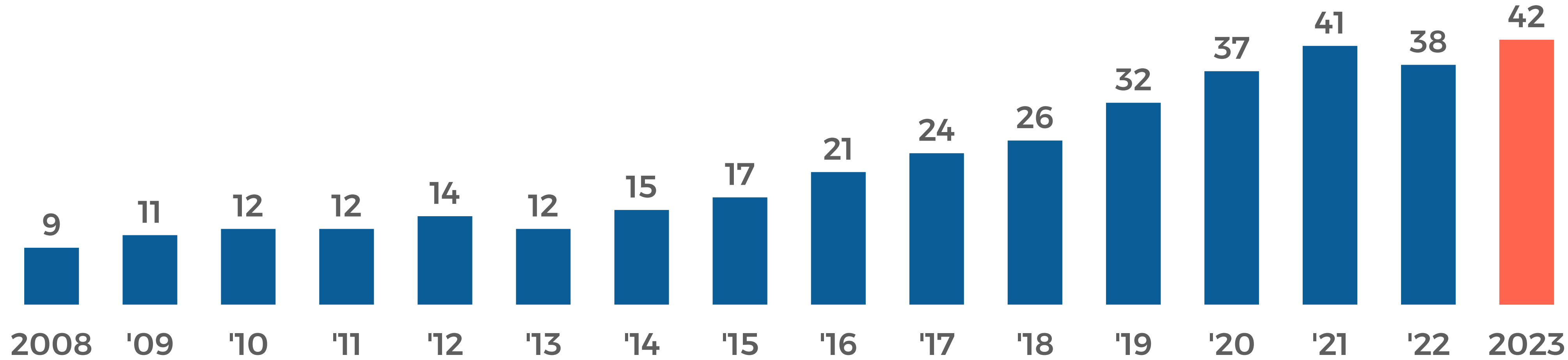
% EVER LISTENED TO A PODCAST



Monthly Podcast Listening

TOTAL U.S. POPULATION 12+
% LISTENED TO A PODCAST IN LAST MONTH

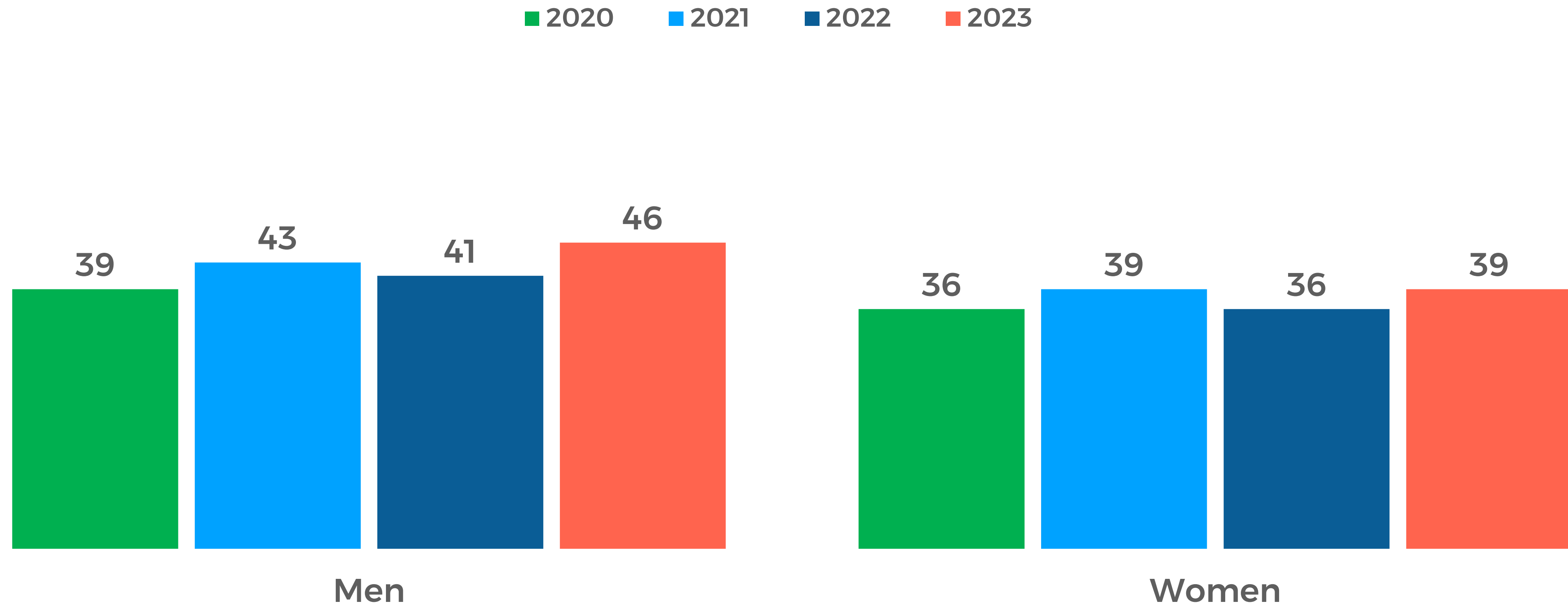
Estimated
120 Million



Monthly Podcast Listening

U.S. POPULATION

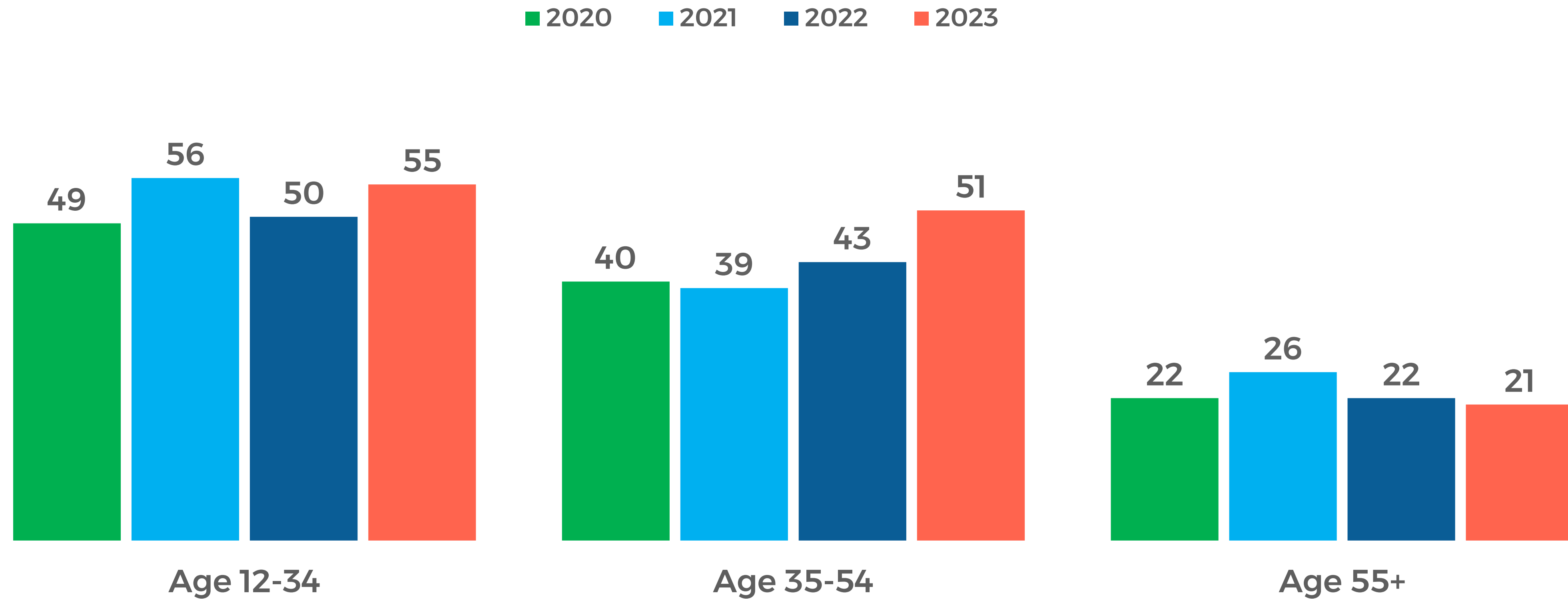
% LISTENED TO A PODCAST IN LAST MONTH



Monthly Podcast Listening

U.S. POPULATION

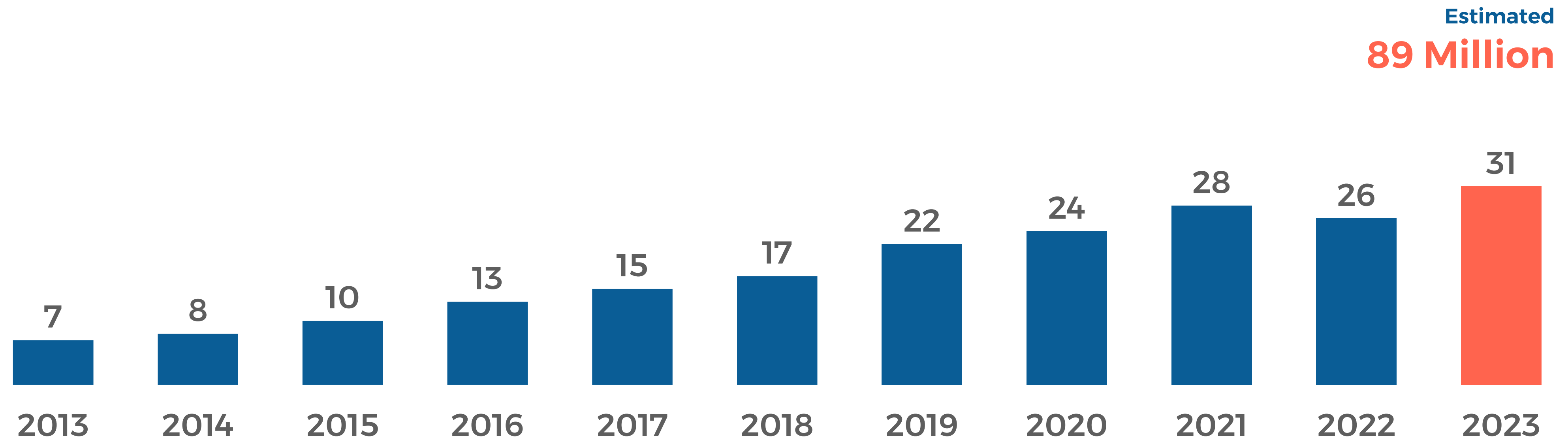
% LISTENED TO A PODCAST IN LAST MONTH



Weekly Podcast Listening

TOTAL U.S. POPULATION 12+

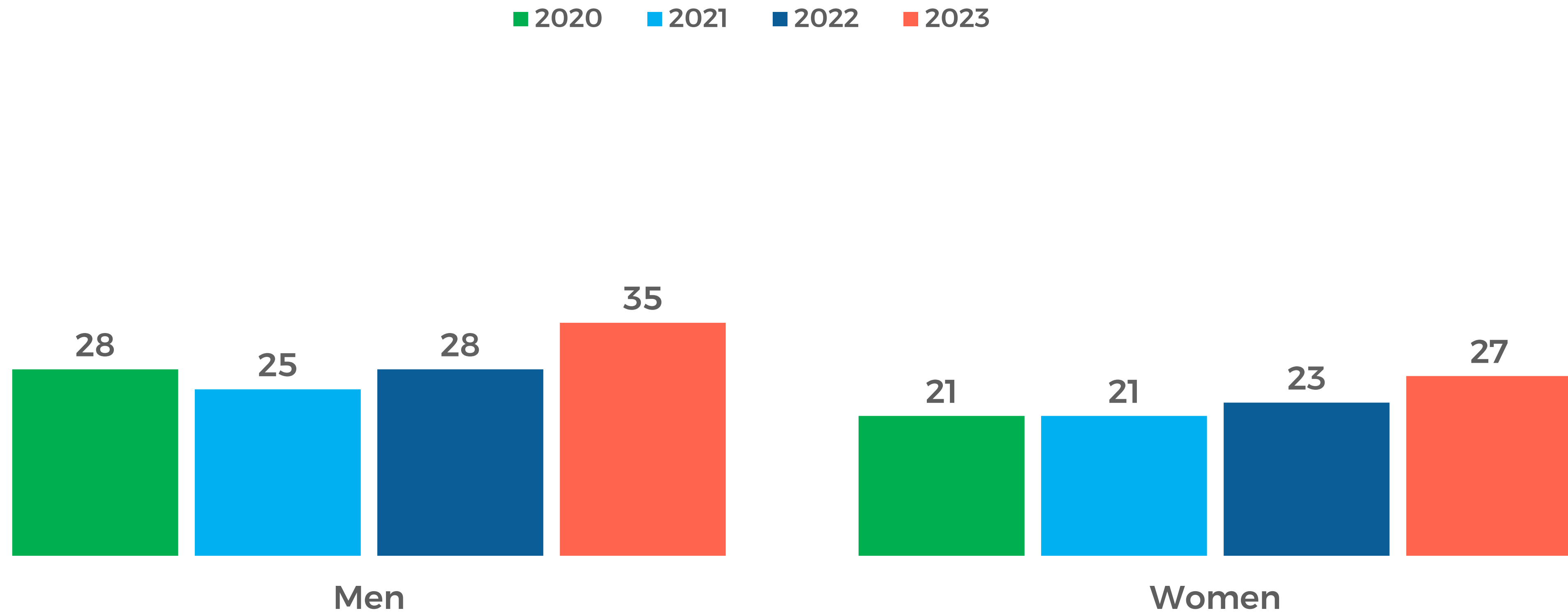
% LISTENED TO A PODCAST IN LAST WEEK



Weekly Podcast Listening

U.S. POPULATION

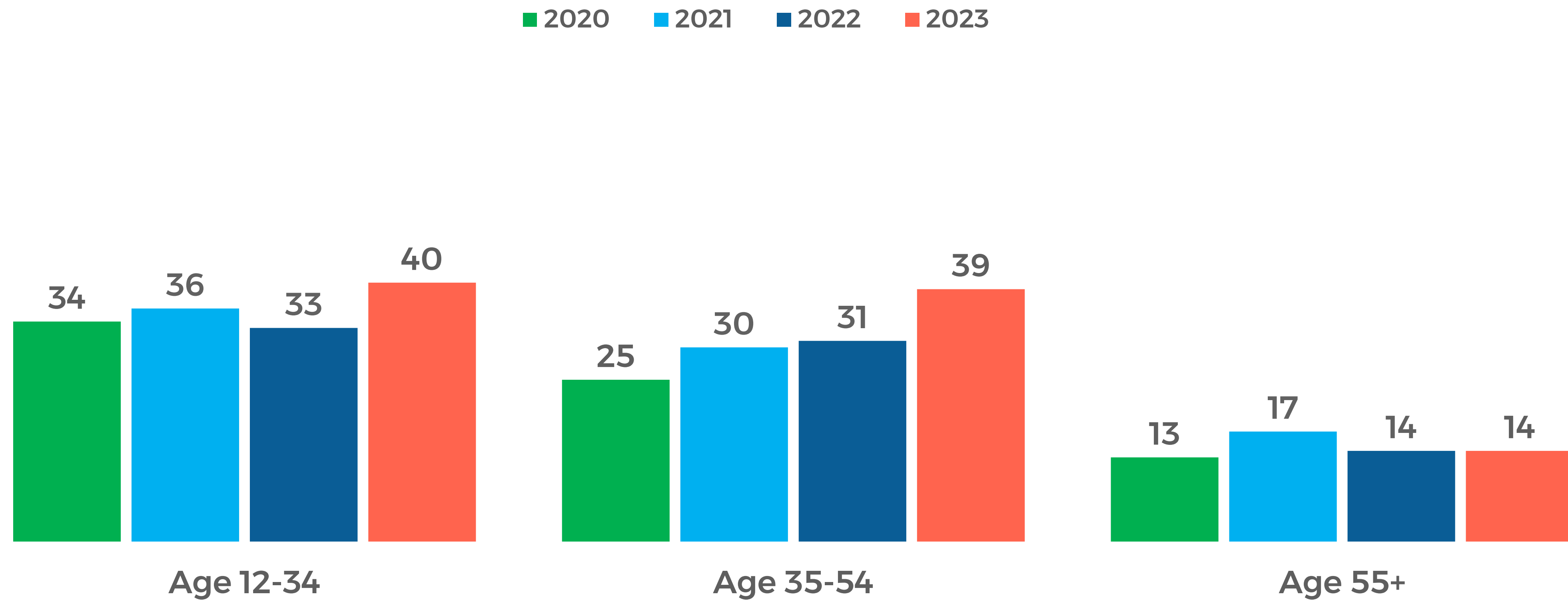
% LISTENED TO A PODCAST IN LAST WEEK



Weekly Podcast Listening

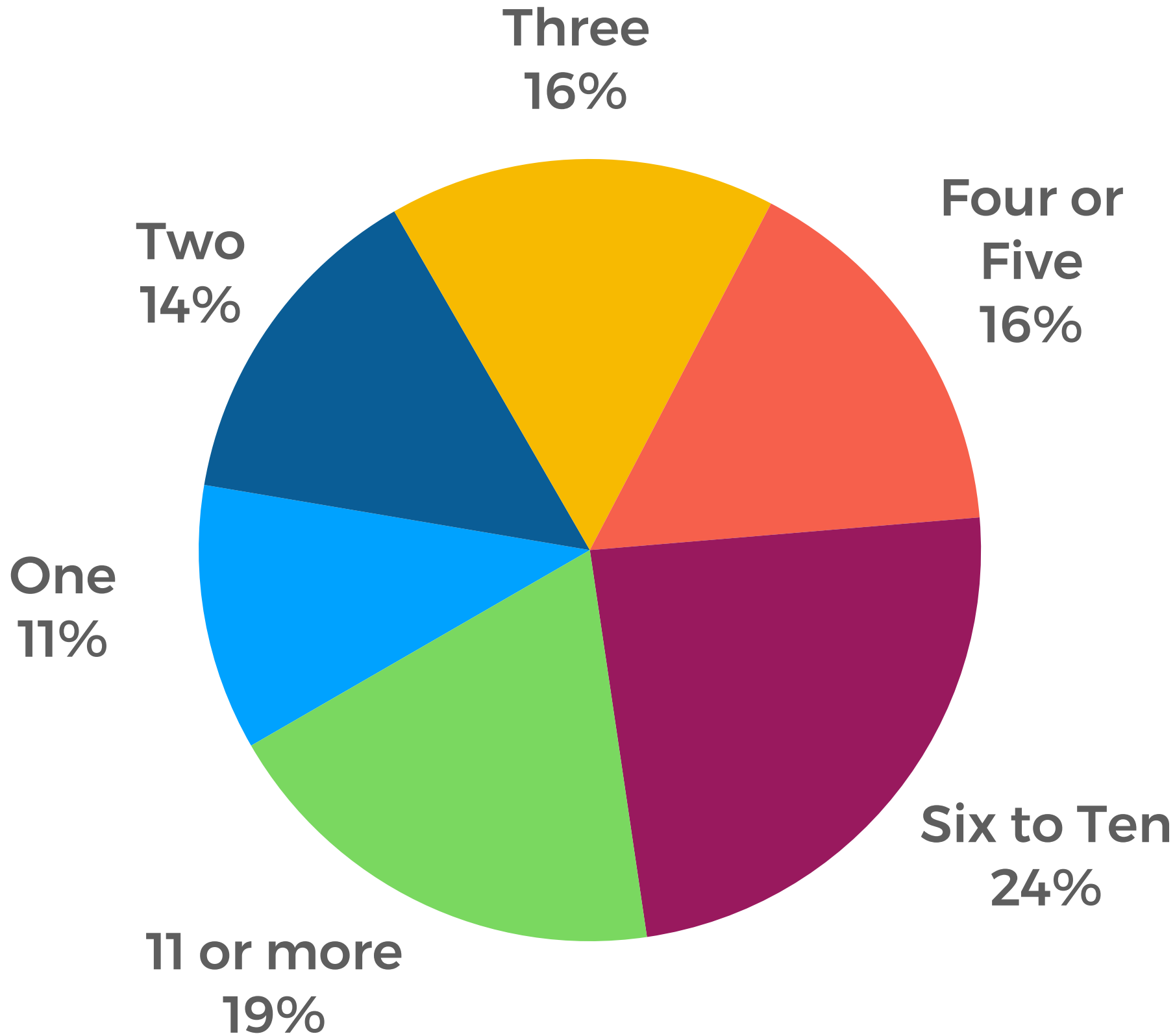
U.S. POPULATION

% LISTENED TO A PODCAST IN LAST WEEK



Number of Podcast Episodes Listened to in Last Week

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



U.S. weekly podcast listeners average
Nine podcasts
in the last week

Observations

Data appears to reflect 'post-pandemic':
on pattern from previous years

Observations

Online audio hits new highs

Observations

Advertisers need to move more of their budgets to audio in all its forms

Observations

Podcasting is 'back,' reaching the highest numbers ever, with 90 million listeners each week

Thank @You!

amazon music
WONDERY
ART19



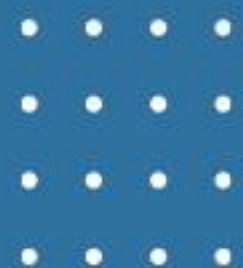
UPCOMING EVENTS

Podcast Movement Evolutions | March 9th, 2023 | Live at Vegas

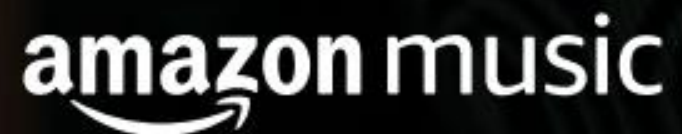
Hit Play, Boomers: Podcasting's 55+ Opportunity | Webinar

The Gen Z Podcast Listener | Webinar

Annual Moms and Media Report | Webinar



25TH ANNIVERSARY
THE INFINITE DIAL[®]



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WONDERY



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