



THE INFINITE DIAL[®] 2025



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



Presentation Outline

 Study Overview & Methodology

 Media & Technology

 Social Media

 Online Audio

 Online Audio Brands

 Podcasts

 In-Car Media

 Observations

Study Methodology

- In January 2025, Edison Research conducted a national survey of 5,020 people aged 12 and older
 - N=1,006 telephone surveys
 - N=4,014 online surveys
- Survey offered in both English and Spanish
- Data weighted to national 12+ U.S. population figures



 THE INFINITE DIAL® 2025

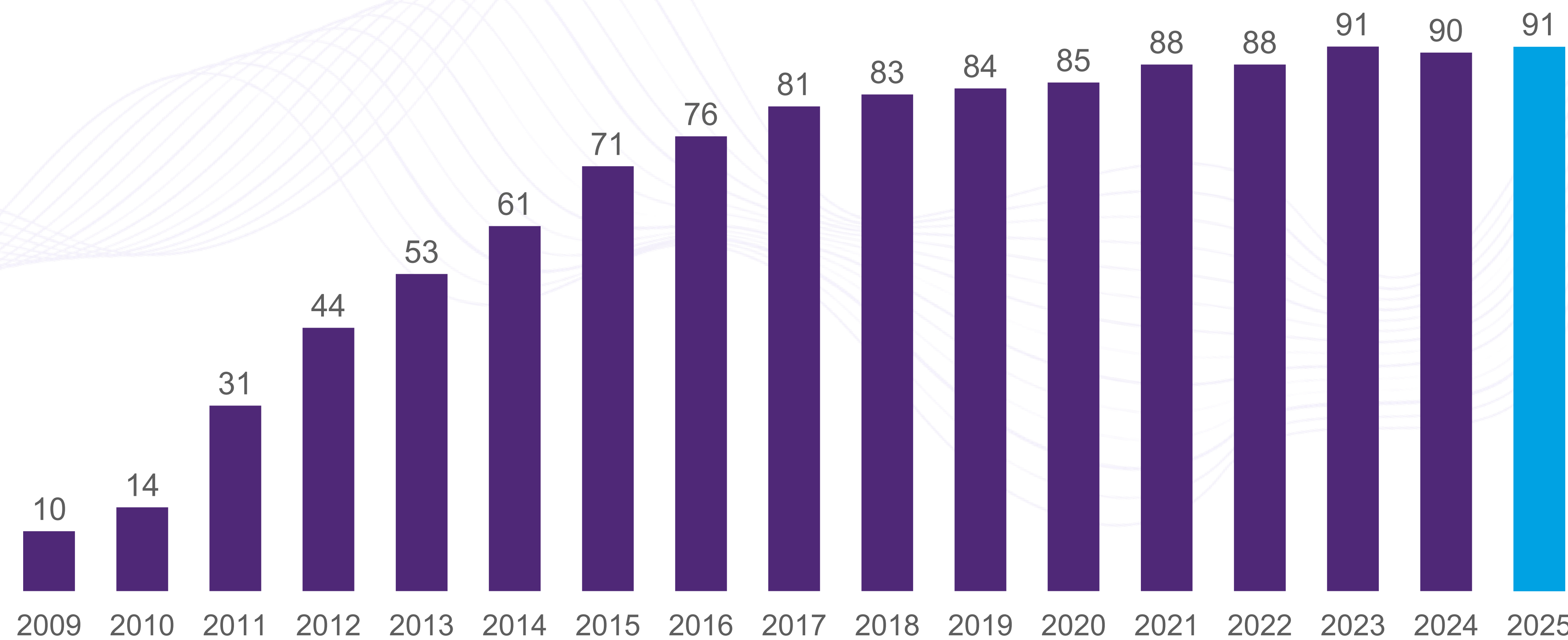
Media & Technology



Smartphone Ownership

TOTAL U.S. POPULATION 12+
% OWNING A SMARTPHONE

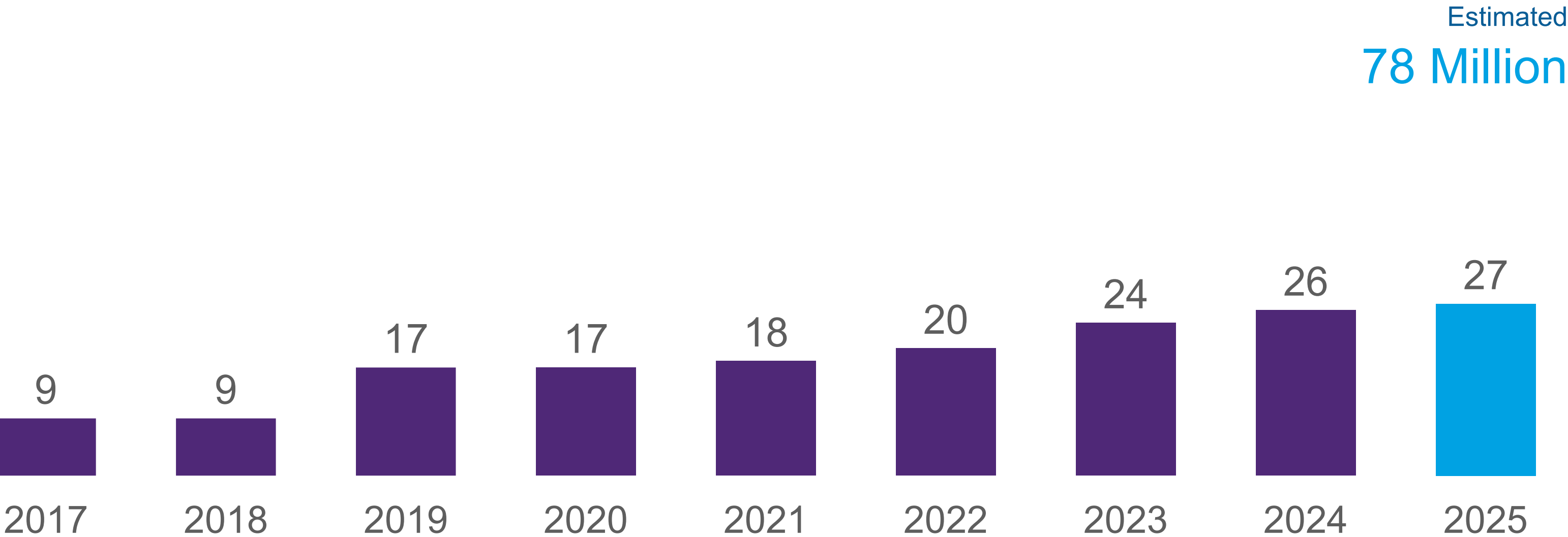
Estimated
262 Million



Smart Watch Ownership

TOTAL U.S. POPULATION 12+

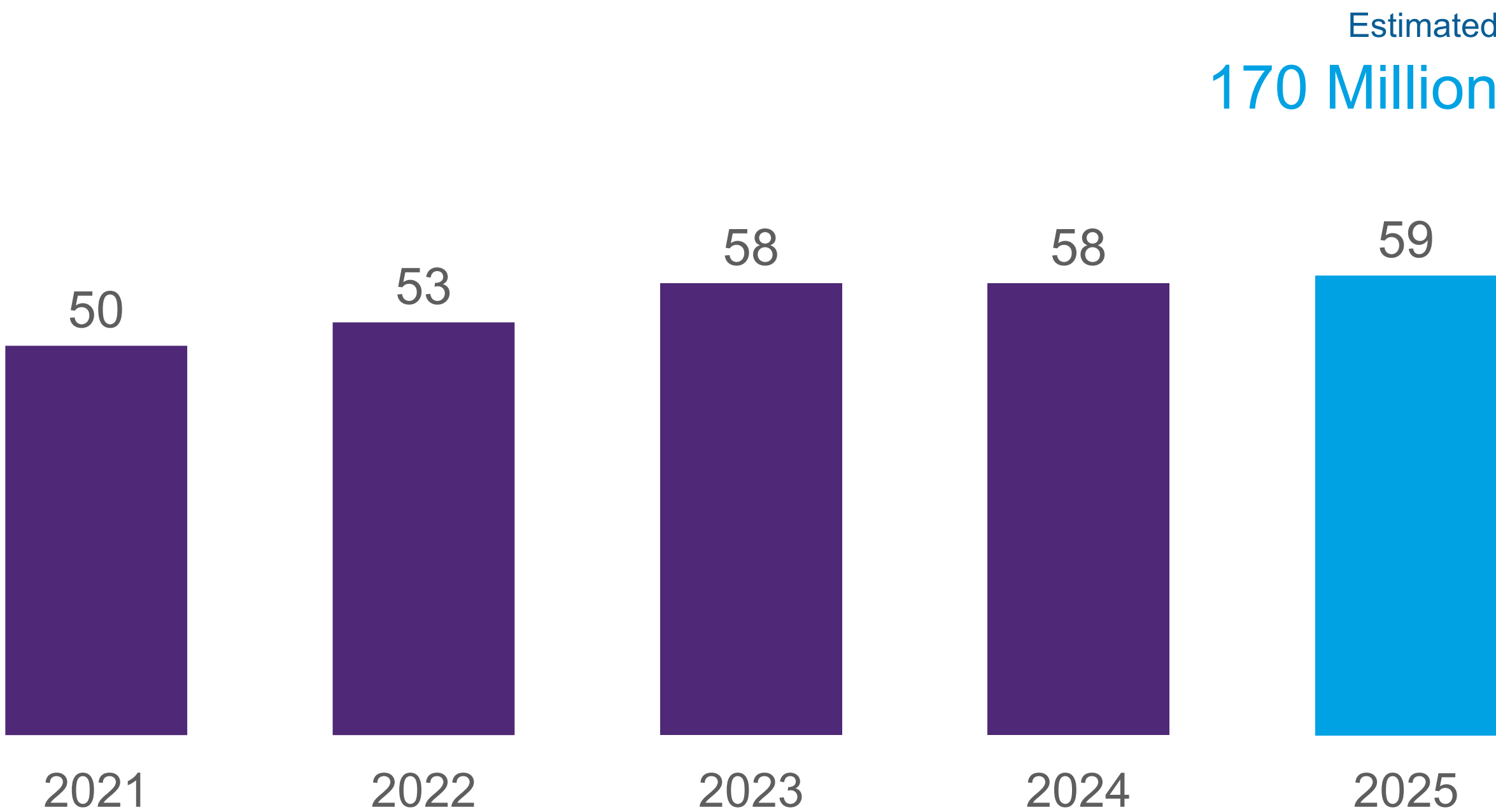
% OWNING A SMART WATCH



Bluetooth-Enabled Wireless Headphones Ownership

TOTAL U.S. POPULATION 12+

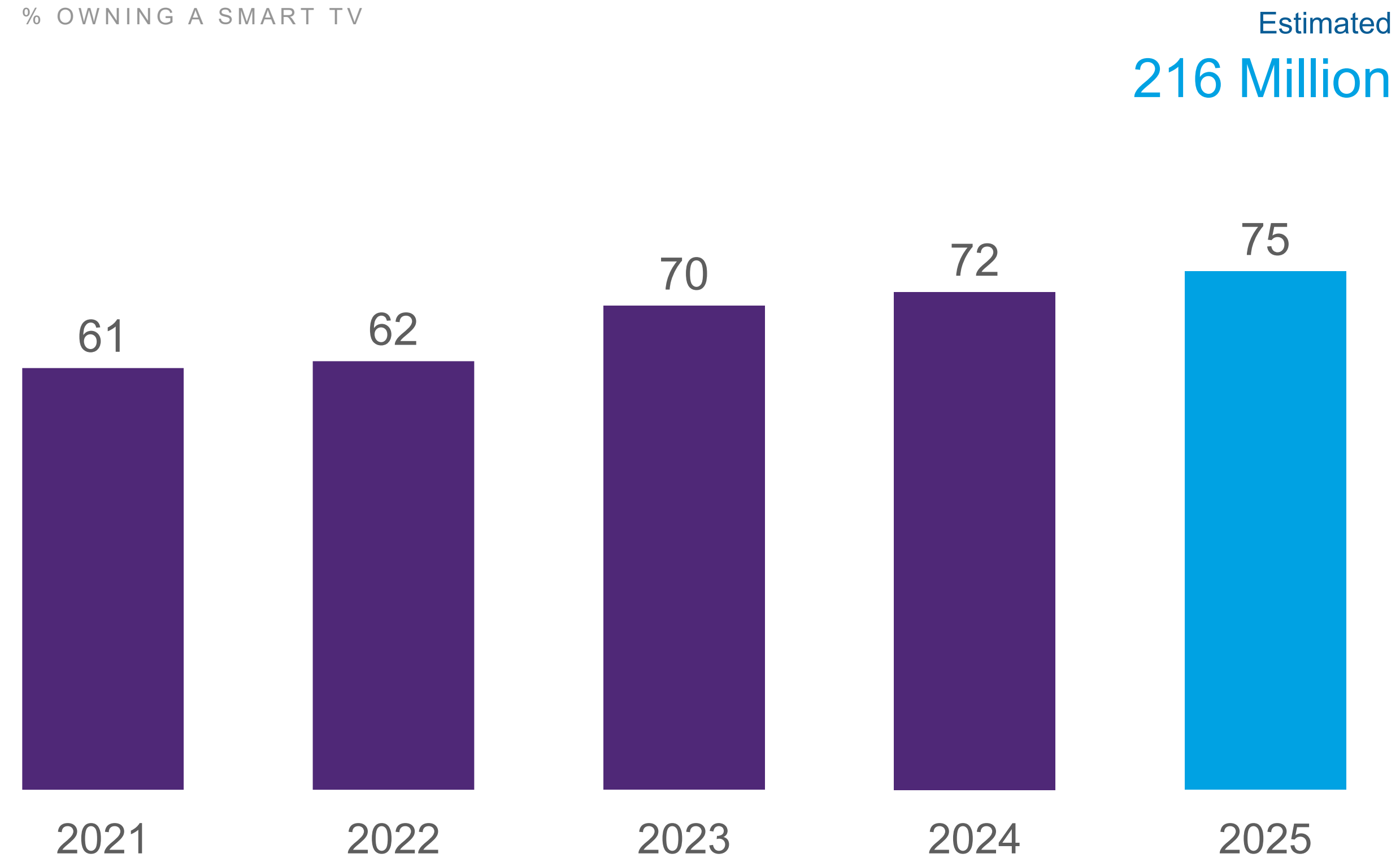
% OWNING BLUETOOTH ENABLED WIRELESS HEADPHONES

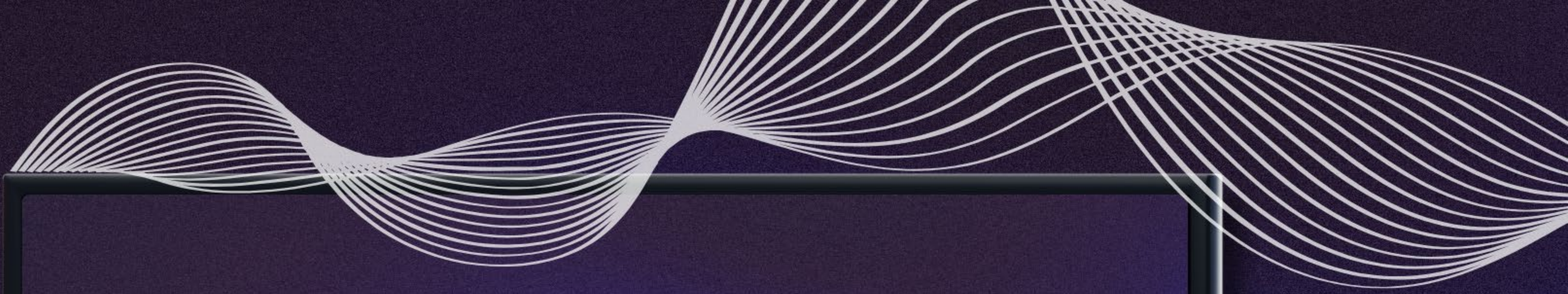


Smart TV Ownership

TOTAL U.S. POPULATION 12+

% OWNING A SMART TV



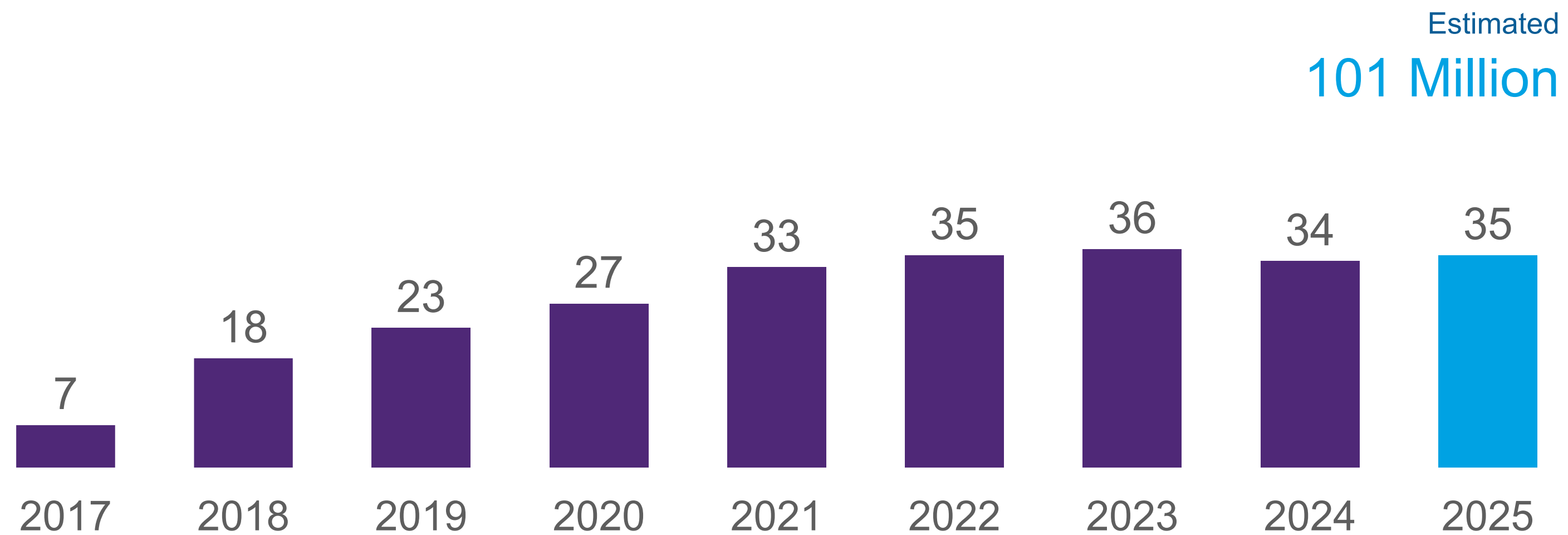


Smart TVs are now
in *three-quarters* of
American homes

Smart Speaker Ownership

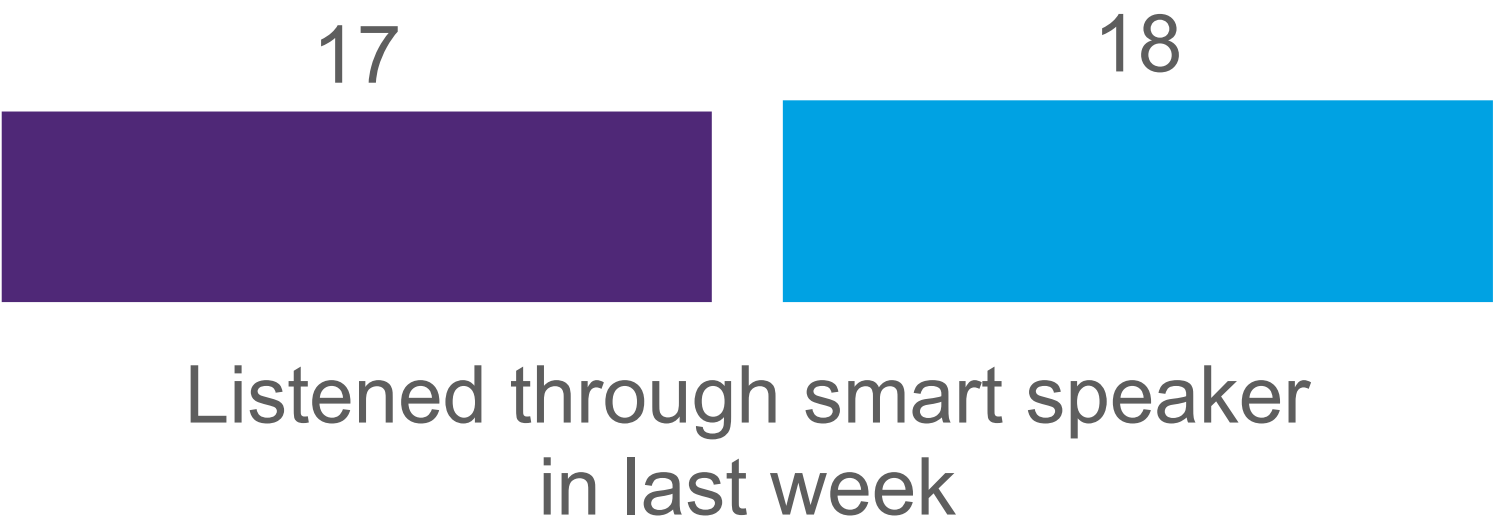
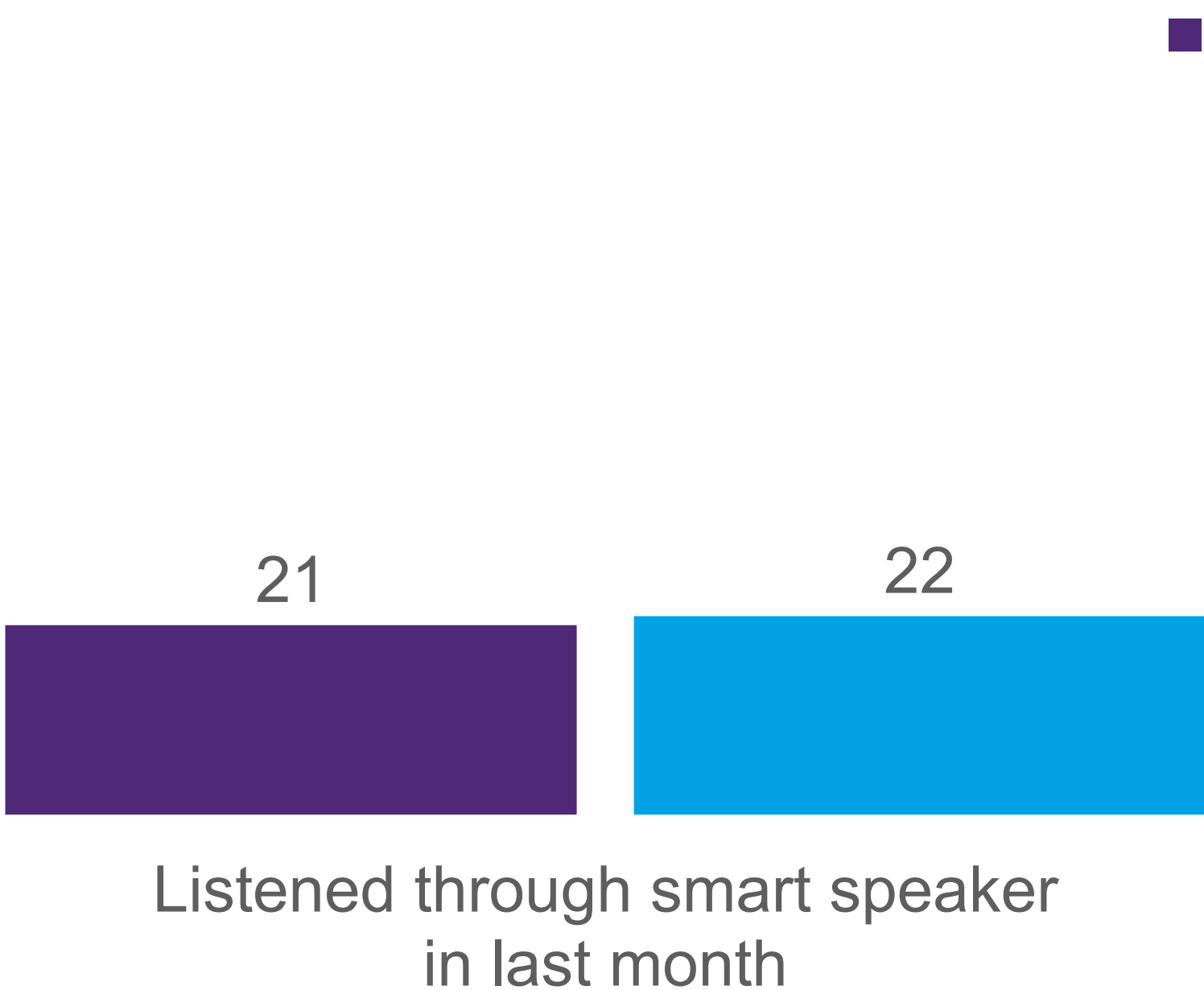
TOTAL U.S. POPULATION 12+

% OWNING A SMART SPEAKER



Audio Listening through Smart Speakers

TOTAL U.S. POPULATION 12+



 THE INFINITE DIAL® 2025

Social Media

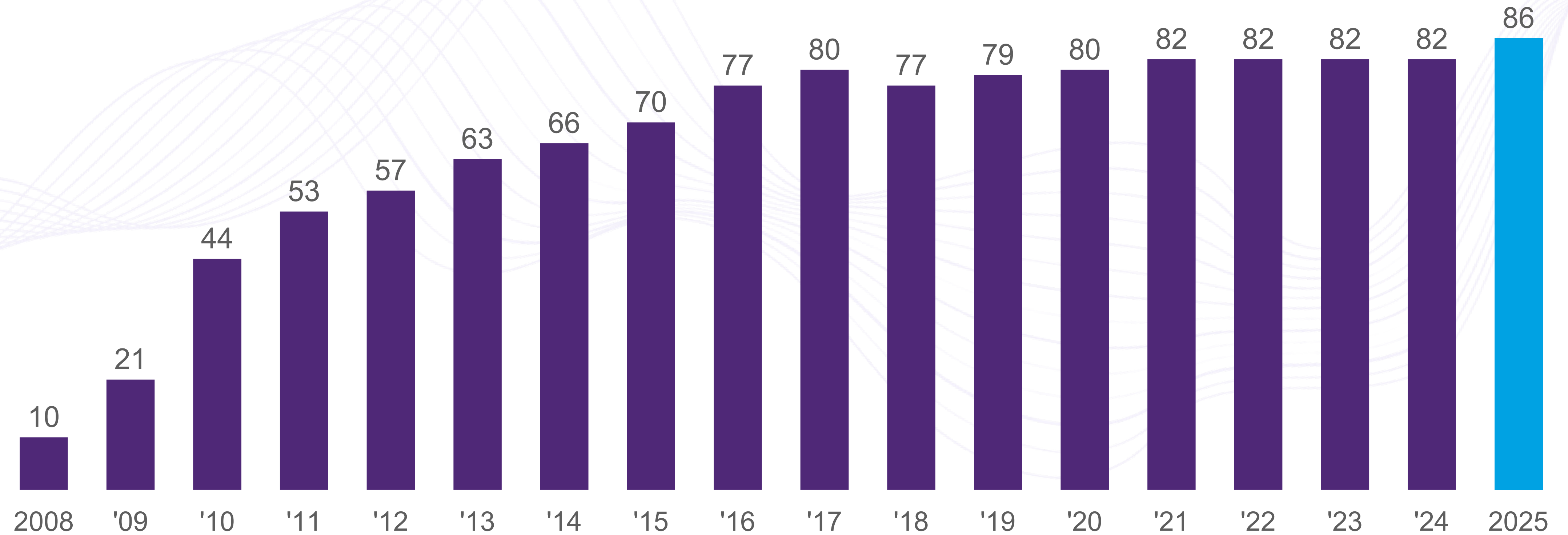


Social Media Usage

TOTAL U.S. POPULATION 12+

% CURRENTLY EVER USE SOCIAL MEDIA

Estimated
248 Million



Social media reaches

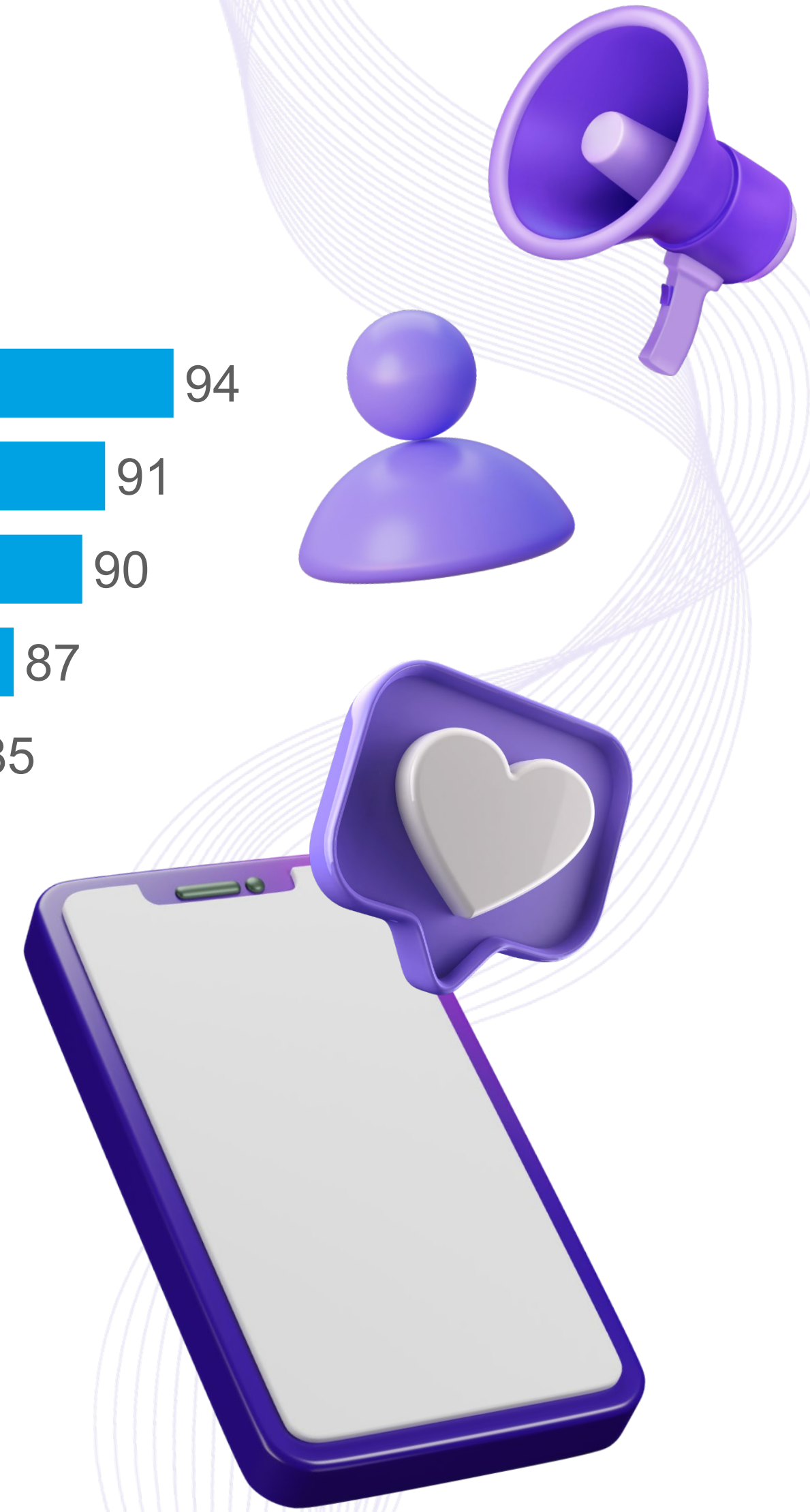
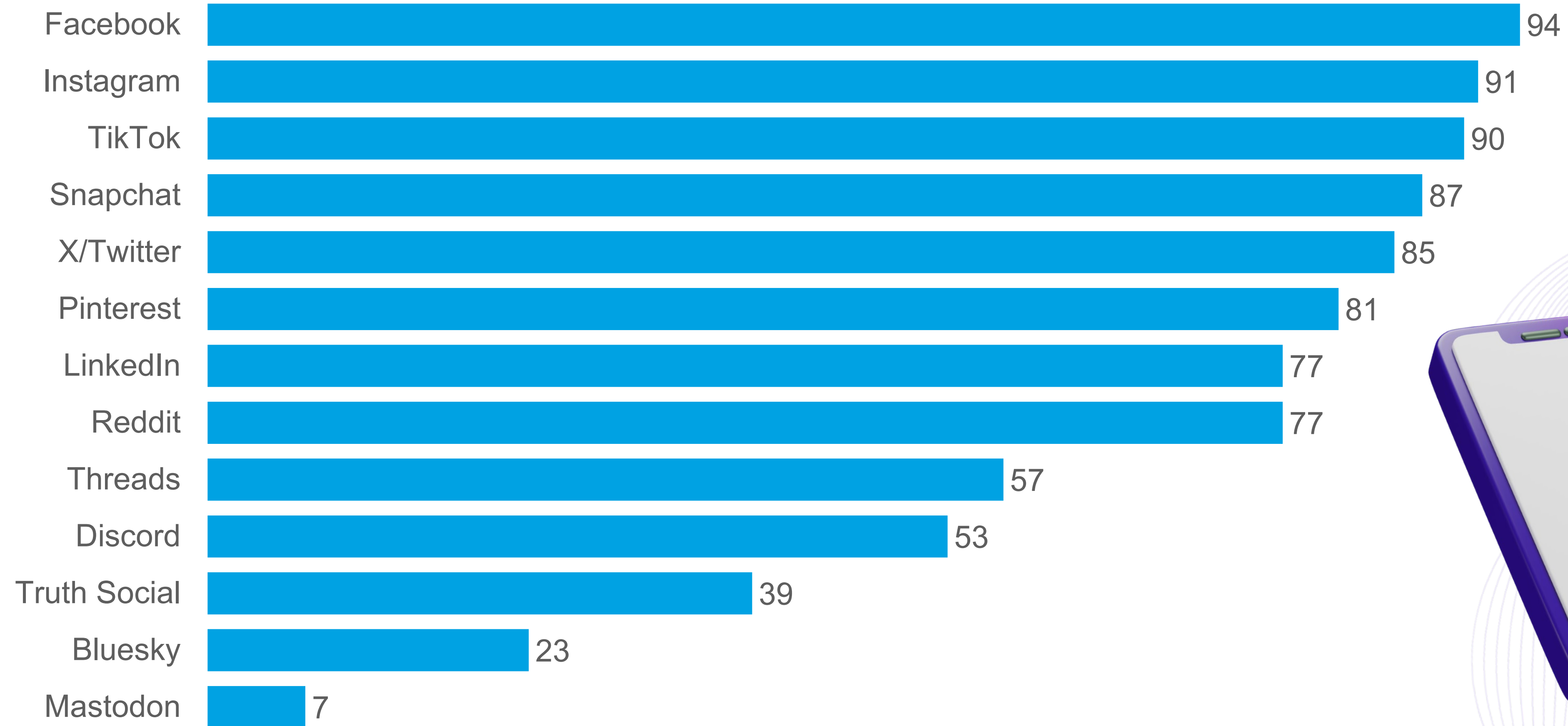
86%

of Americans,
with clear divides in platform
preference by generation

Social Media Brand Awareness

TOTAL U.S. POPULATION 12+

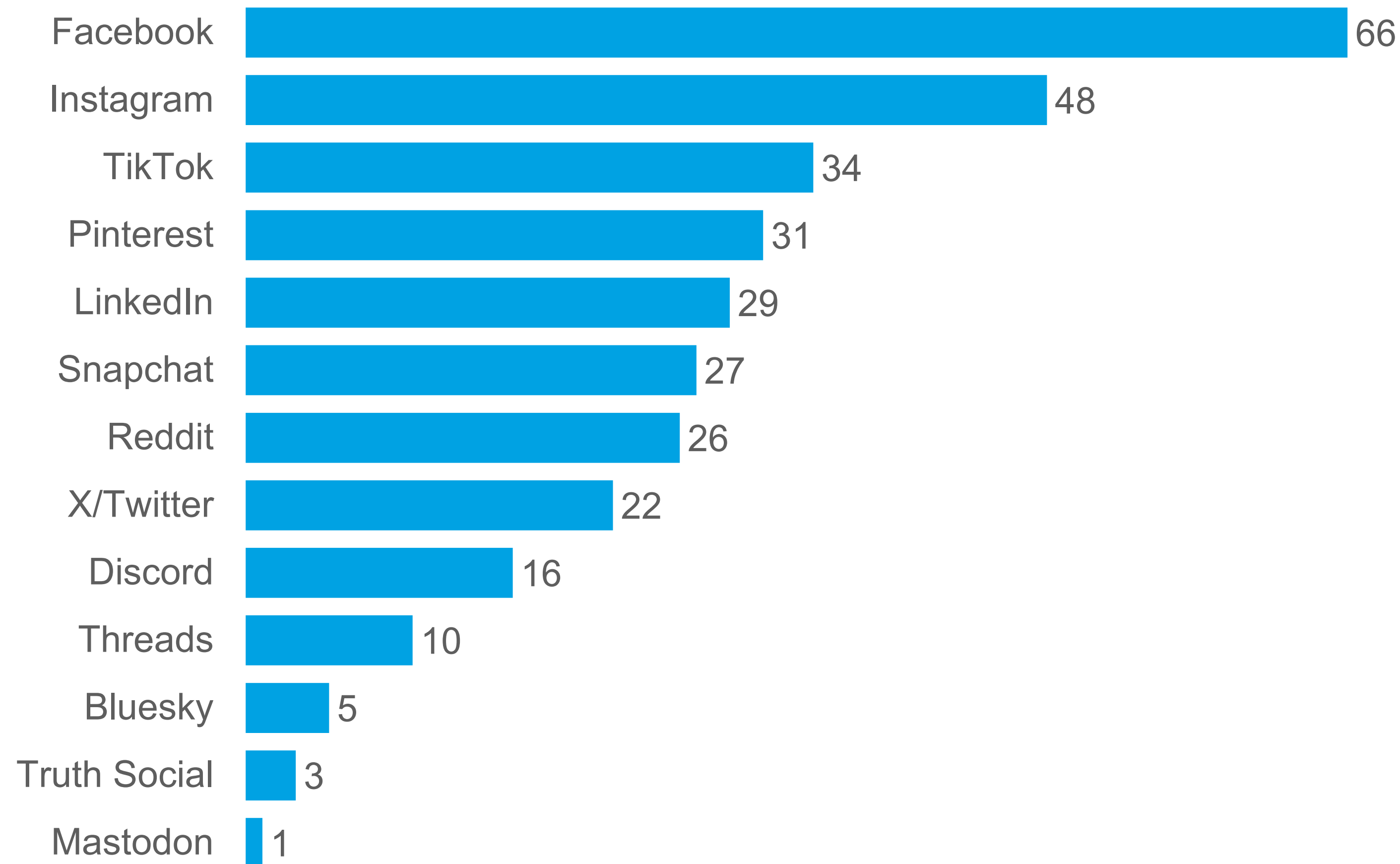
% AWARE OF SOCIAL MEDIA BRAND



Social Media Brand Usage

TOTAL U.S. POPULATION 12+

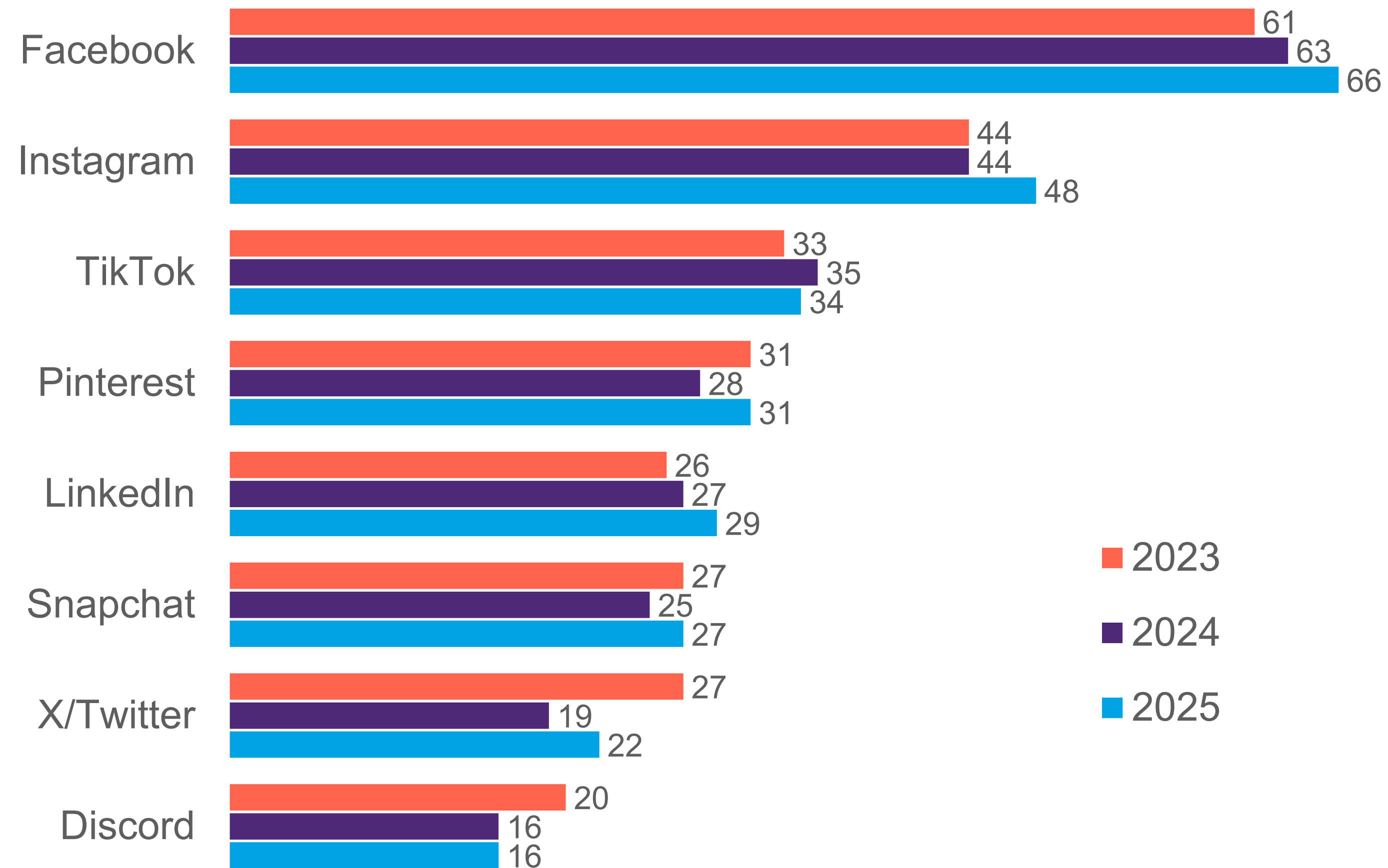
% CURRENTLY USE SOCIAL MEDIA BRAND



Social Media Brand Usage

TOTAL U.S. POPULATION 12+

% CURRENTLY USE SOCIAL MEDIA BRAND



2023

2024

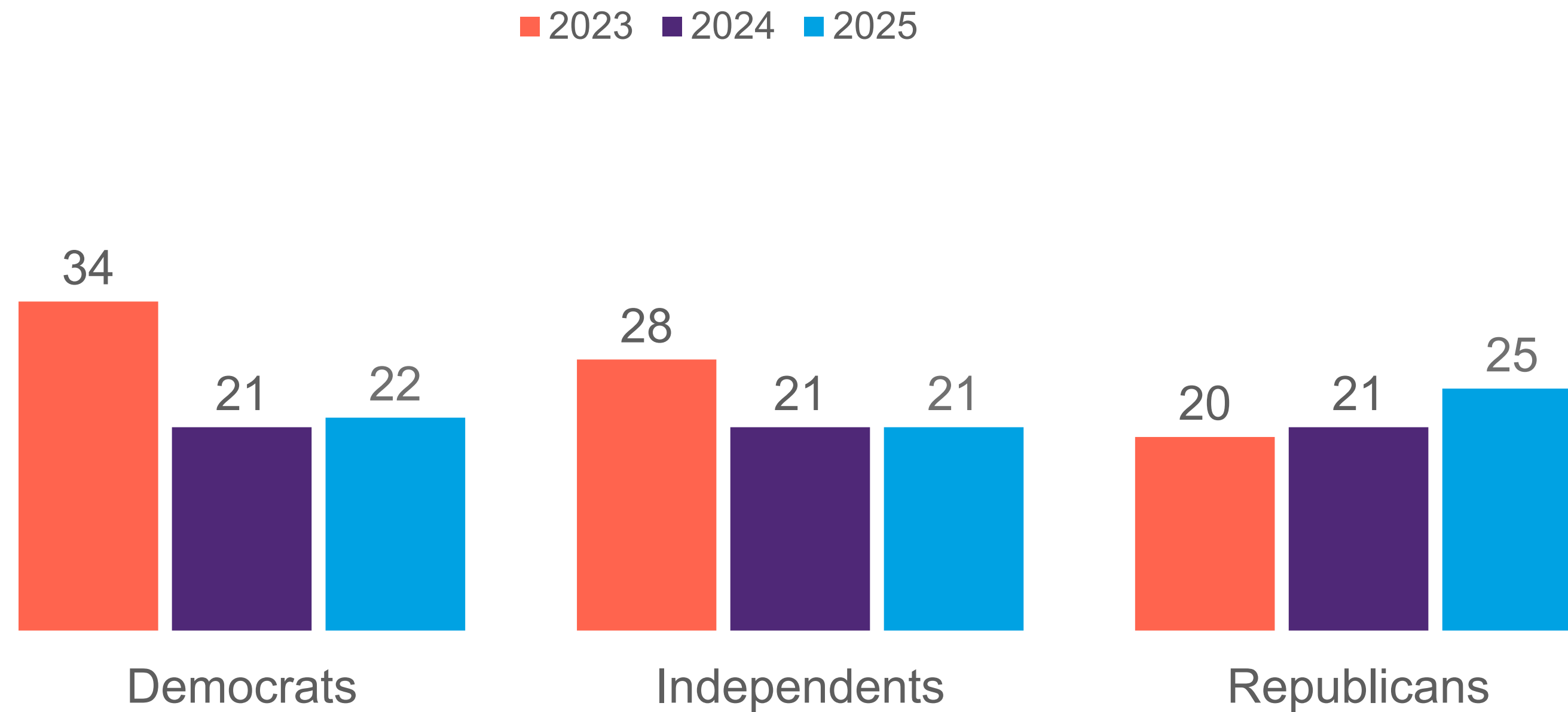
2025



X/Twitter Usage by Political Affiliation

TOTAL U.S. POPULATION 18+

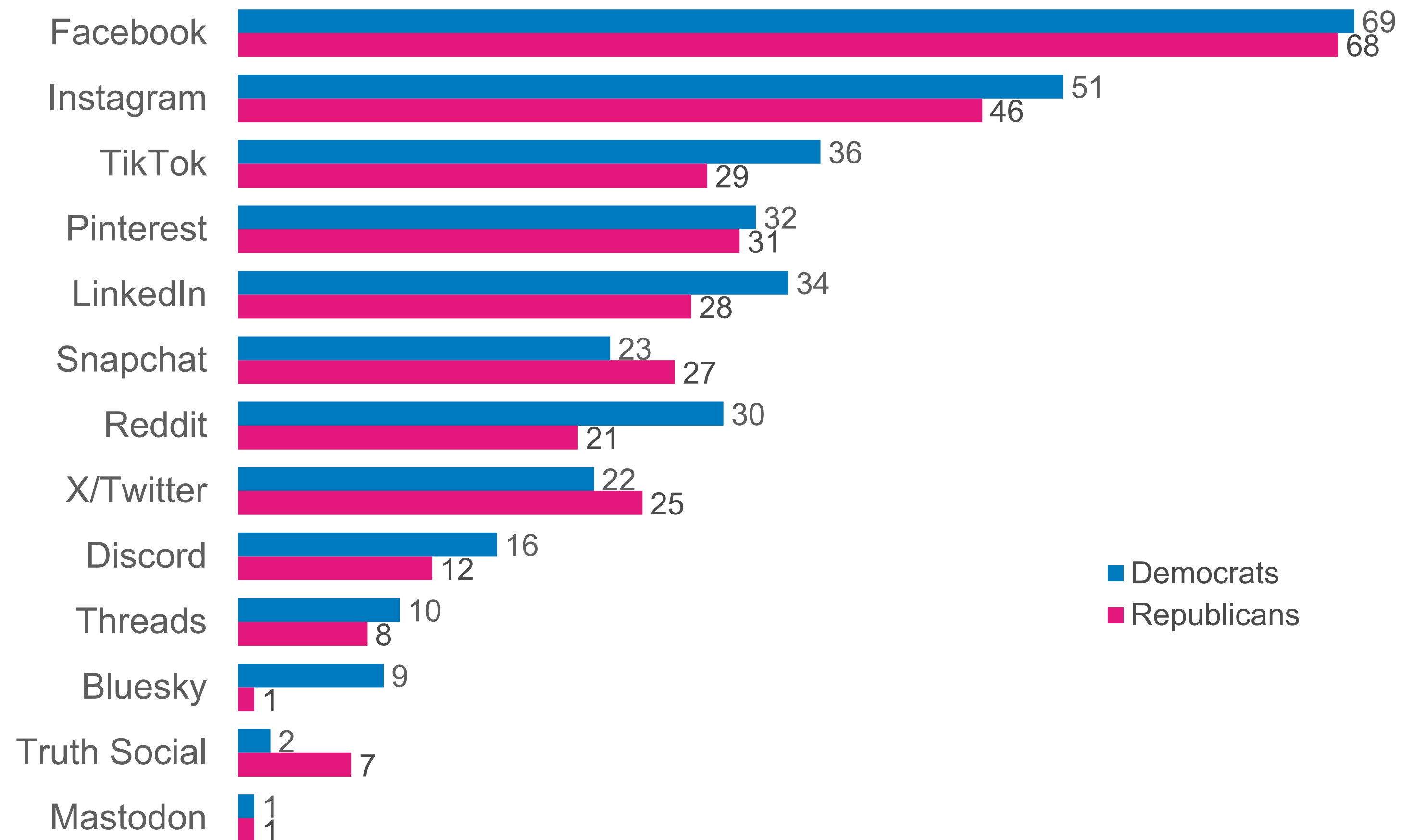
% CURRENTLY USE X, FORMERLY KNOWN AS TWITTER



Social Media Brand Usage

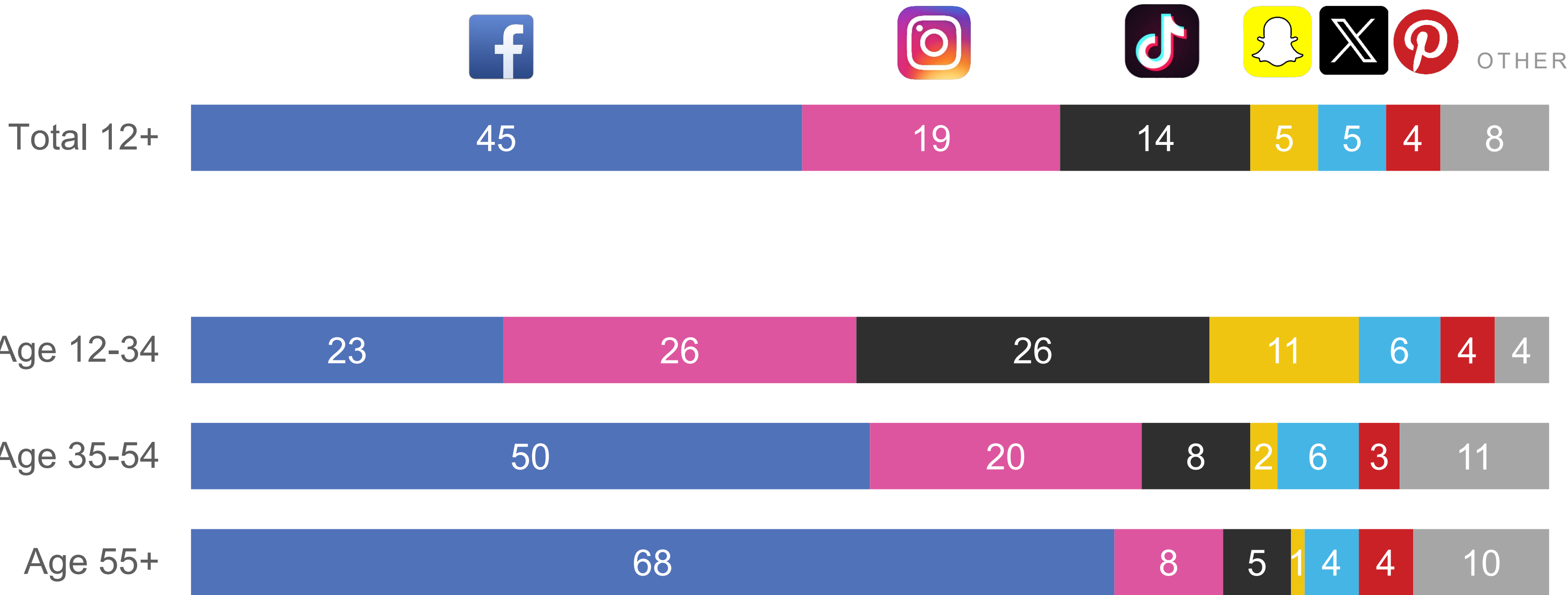
TOTAL U.S. POPULATION 18+

% CURRENTLY USE SOCIAL MEDIA BRAND



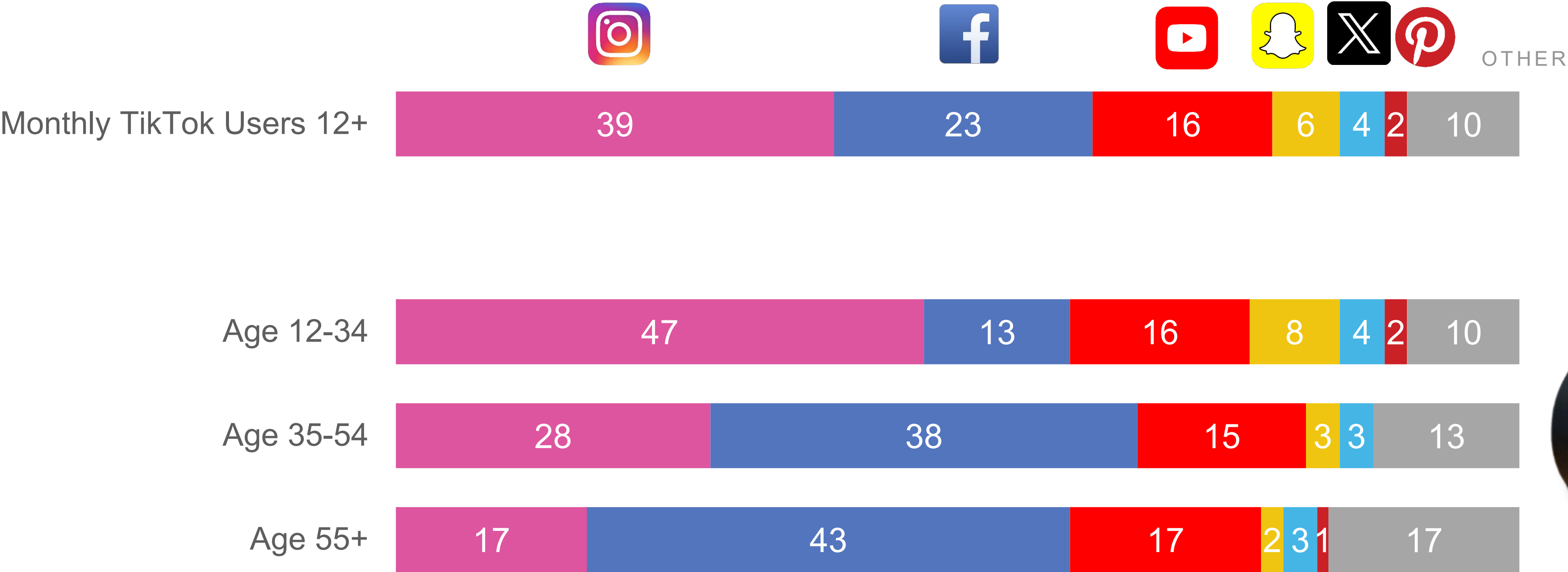
Social Media Brand Used Most Often

BASE: U.S. 12+ SOCIAL MEDIA USERS



What would TikTok users use more often if TikTok were banned?

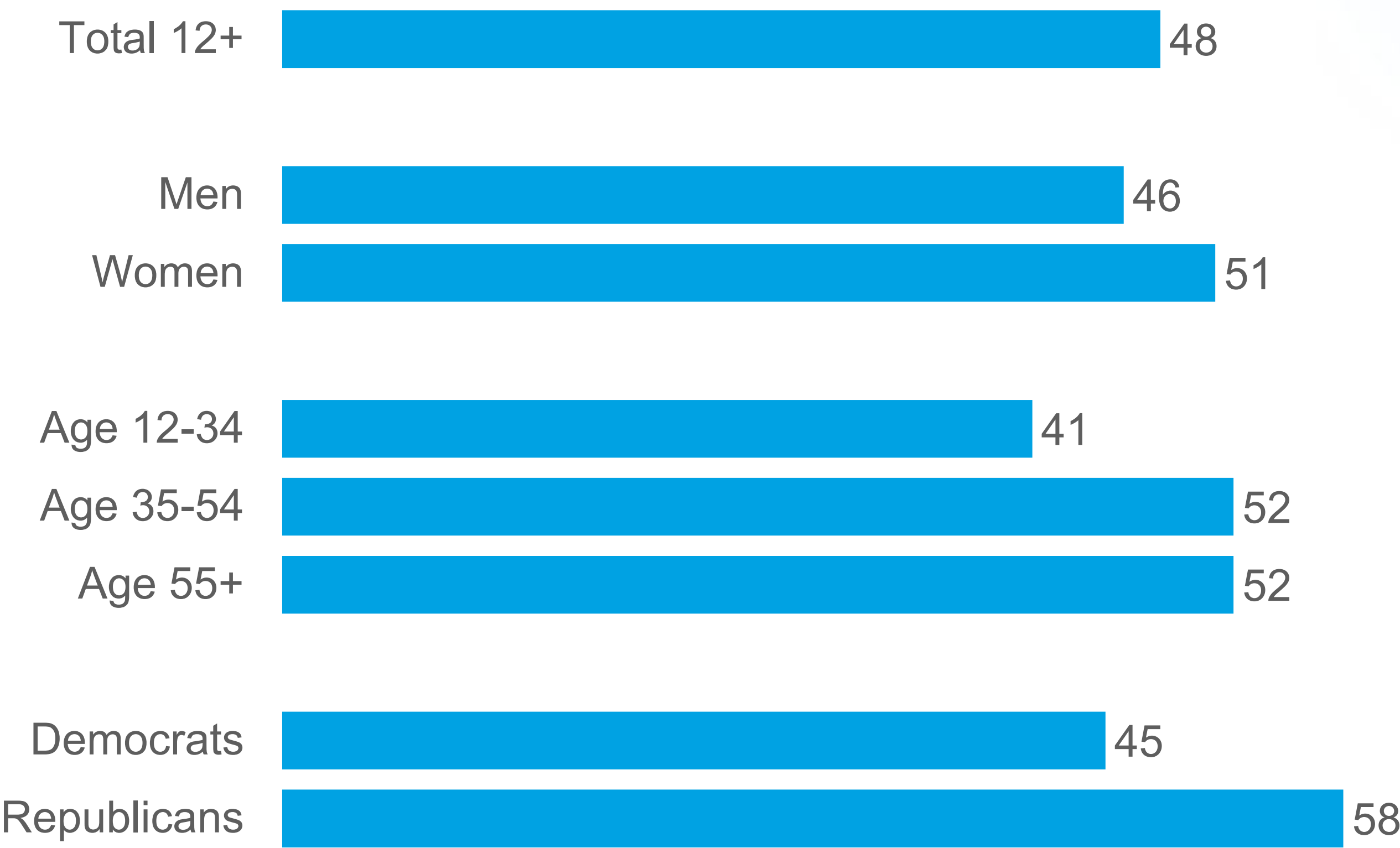
BASE: U.S. AGE 12+ AND USED TIKTOK IN LAST MONTH; 31%



“Suppose TikTok is banned in the U.S. Which one social network service would you use more often in its place?”

Should social media be **banned** in the U.S. for anyone under 16?

TOTAL U.S. POPULATION 12+
% SAYING YES



Almost *half* of Americans

support banning social
media for those under 16



 THE INFINITE DIAL® 2025

Online Audio



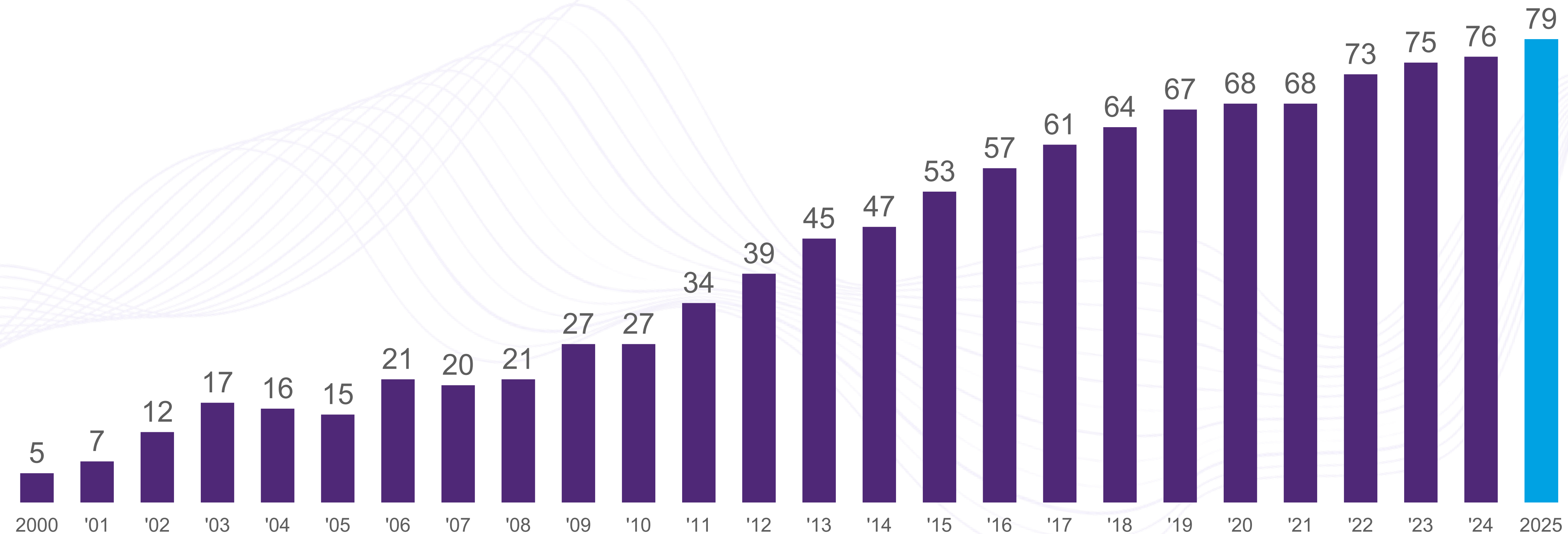
Monthly Online Audio Listening

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
228 Million

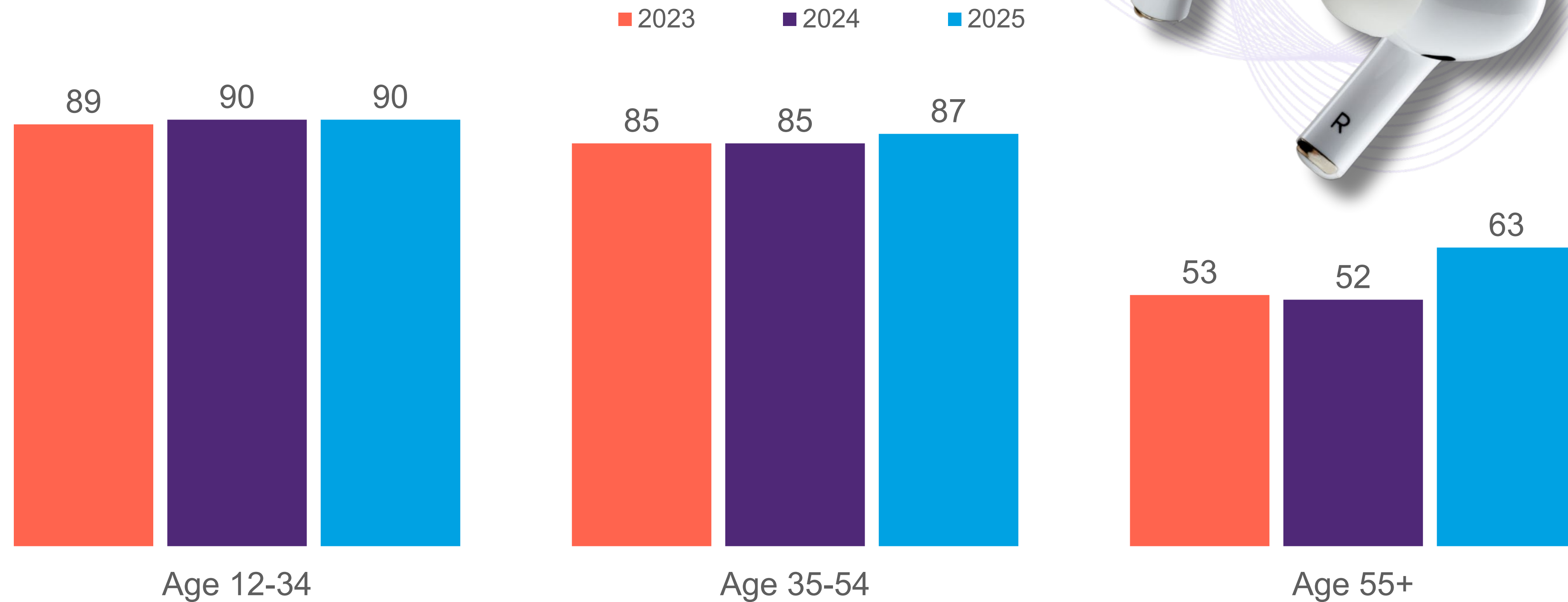


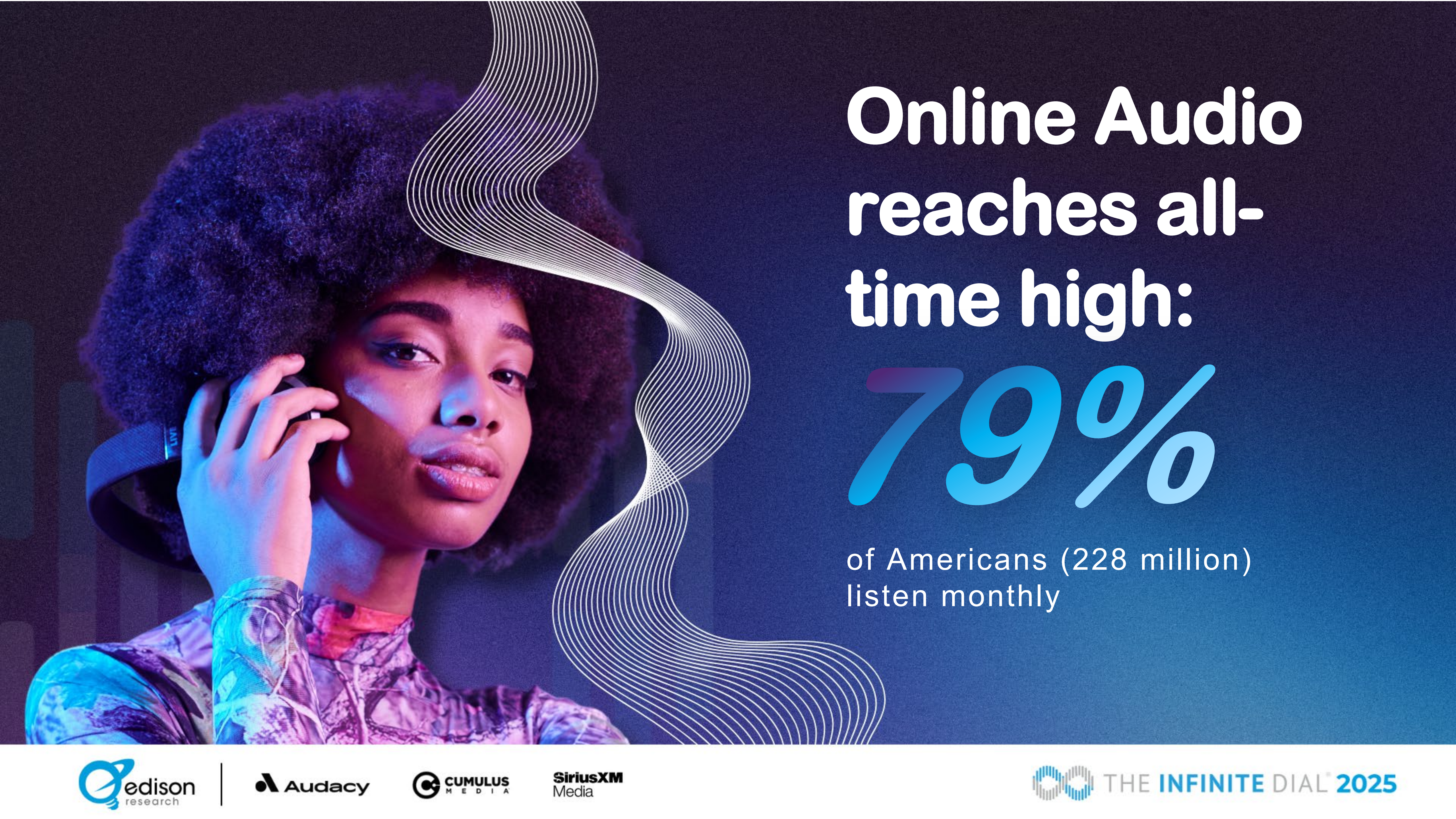
Monthly Online Audio Listening

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





Online Audio reaches all- time high:

79%

of Americans (228 million)
listen monthly

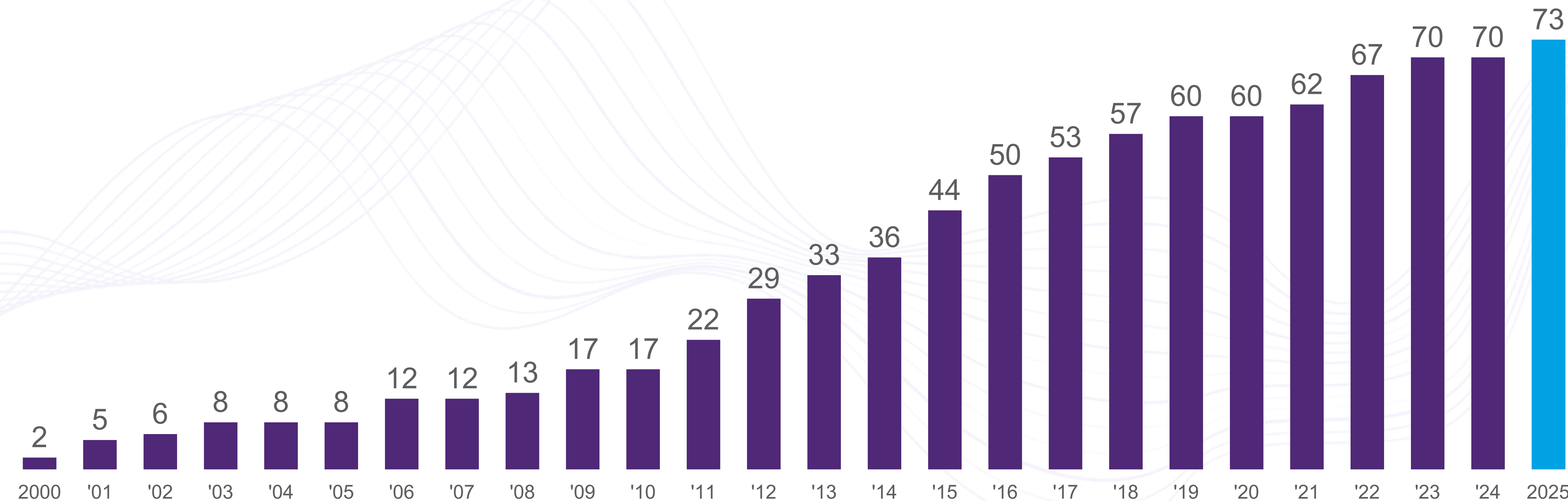
Weekly Online Audio Listening

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

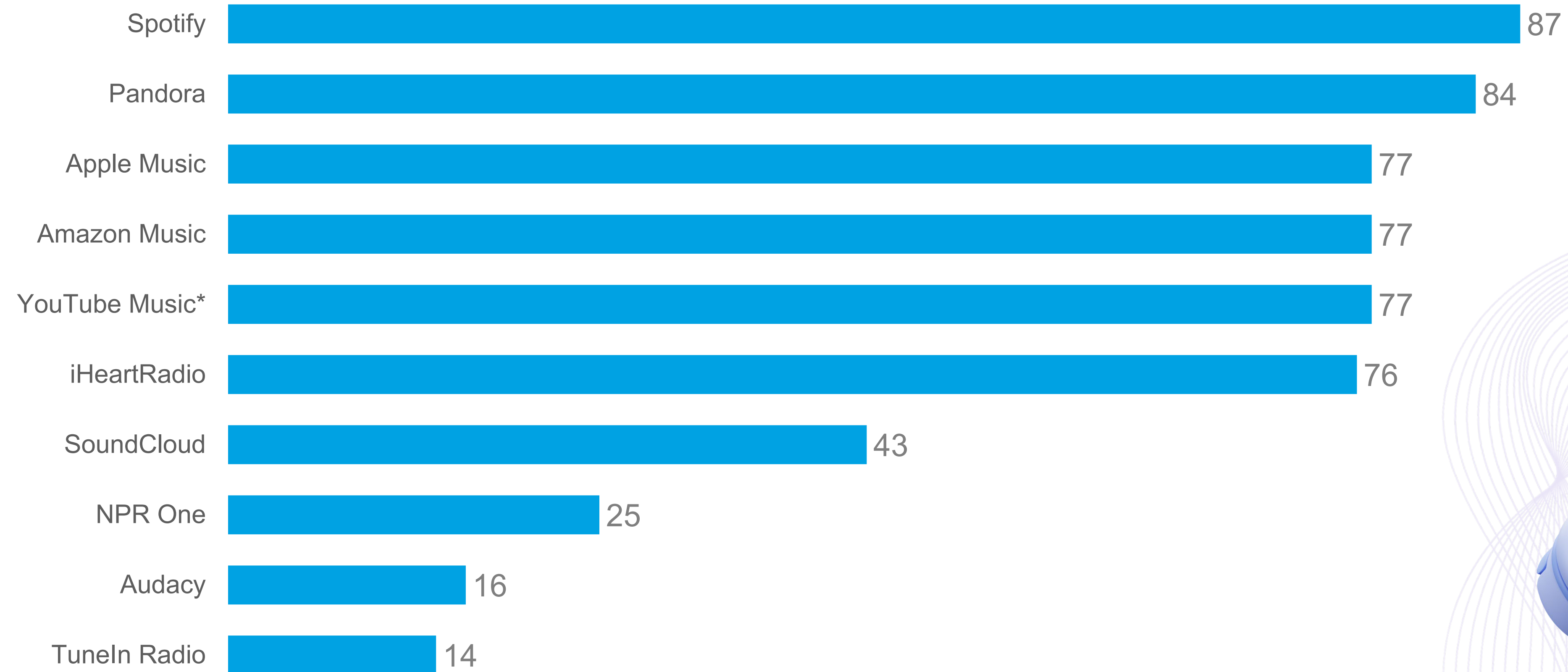
Estimated
210 Million



Online Audio Brand Awareness

TOTAL U.S. POPULATION 12+

% AWARE OF ONLINE AUDIO BRAND

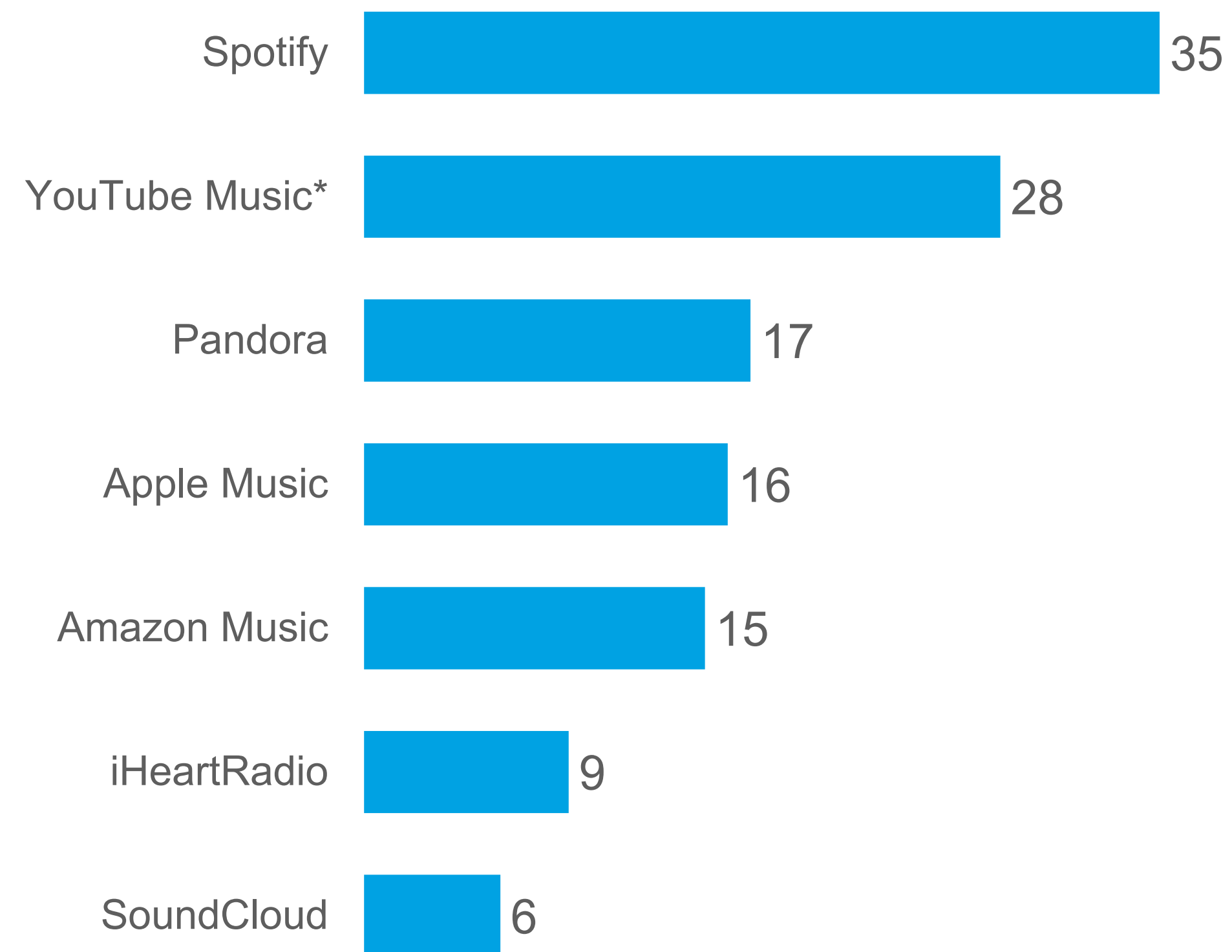


*ASKED AS: "YOUTUBE MUSIC, THE STREAMING MUSIC SERVICE FROM YOUTUBE"

Online Audio Brands Listened to in Last Month

TOTAL U.S. POPULATION 12+

% LISTENED TO ONLINE AUDIO BRAND IN THE LAST MONTH

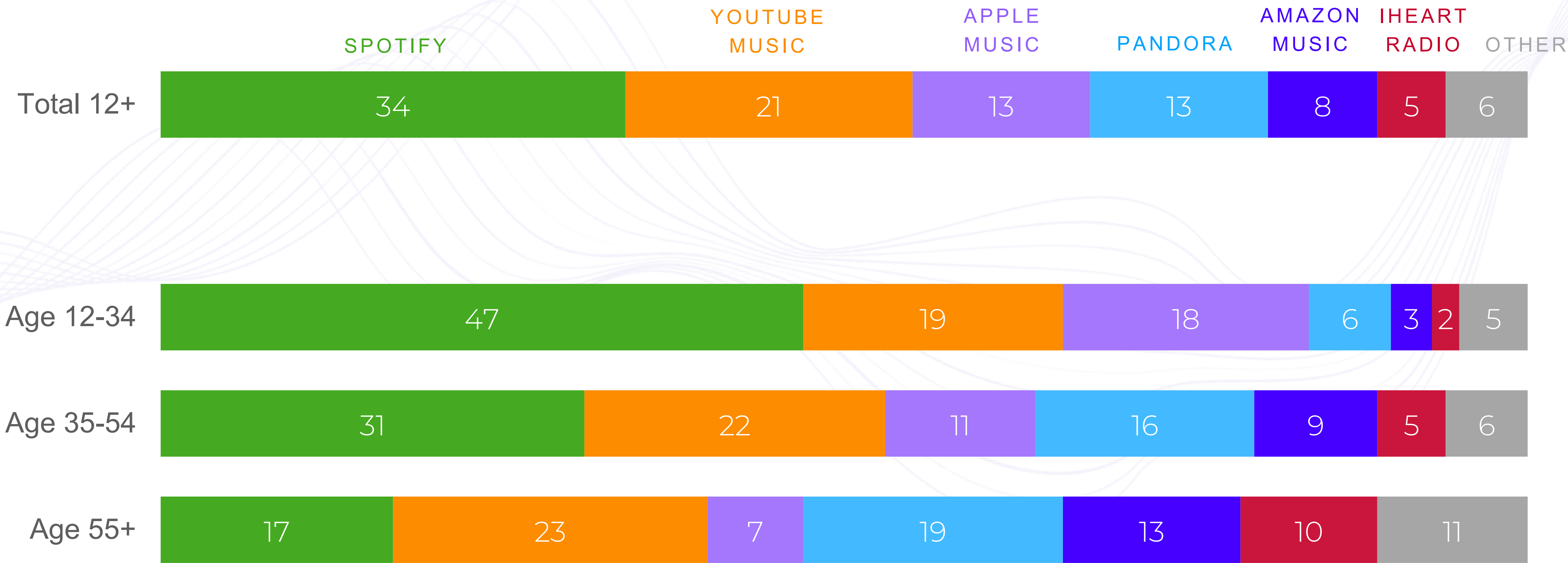


*ASKED AS: "YOUTUBE MUSIC, THE STREAMING MUSIC SERVICE FROM YOUTUBE"



Online Audio Brand Used Most Often

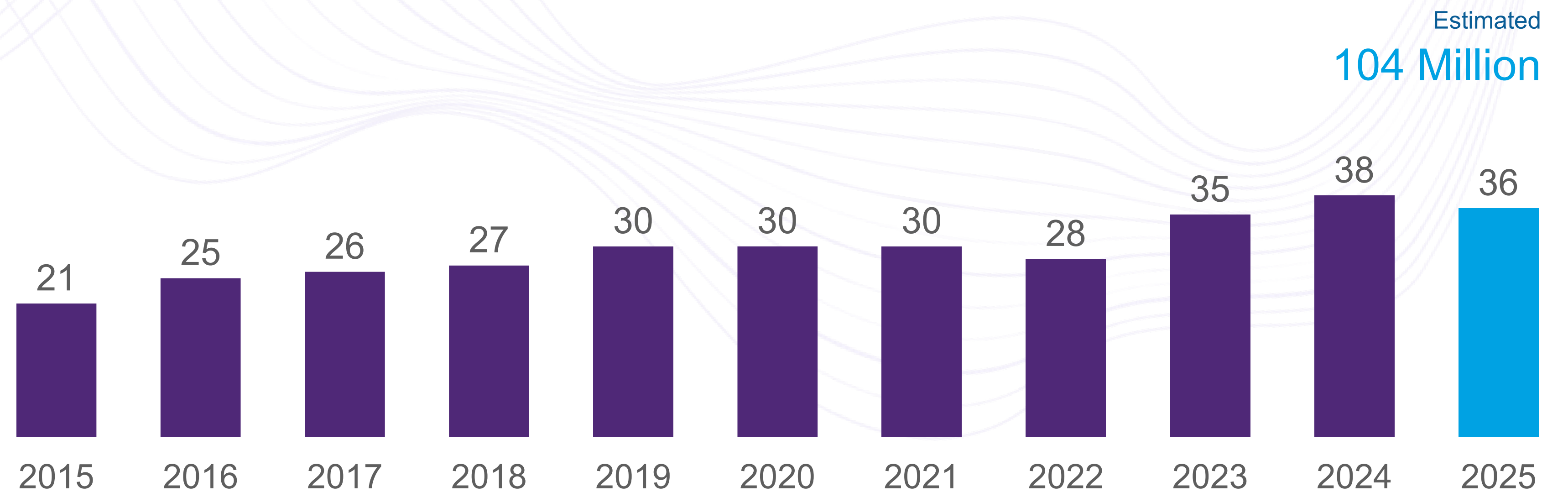
BASE: U.S. 12+ ONLINE AUDIO USERS



Audiobook Listening in Last Year

TOTAL U.S. POPULATION 12+

% LISTENED TO AN AUDIOBOOK IN THE LAST YEAR



 THE INFINITE DIAL® 2025

Podcasting

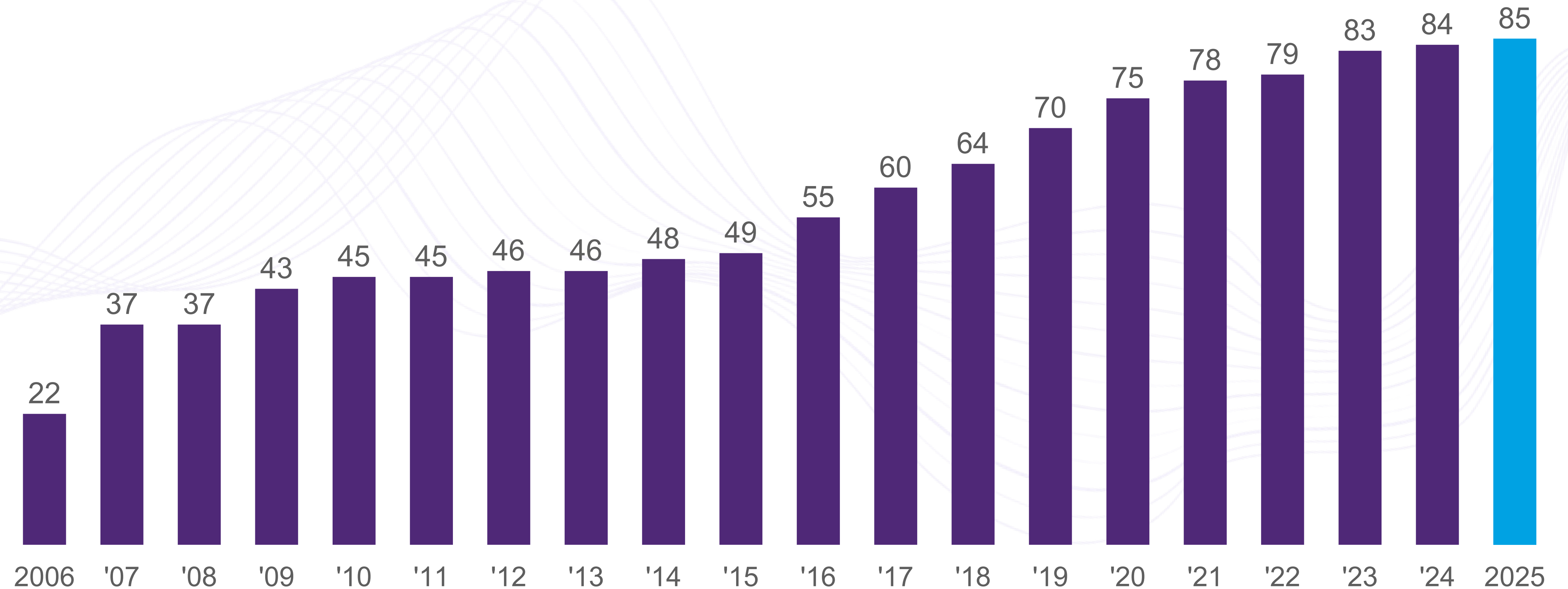


Podcasting Familiarity

TOTAL U.S. POPULATION 12+

% AWARE OF PODCASTING

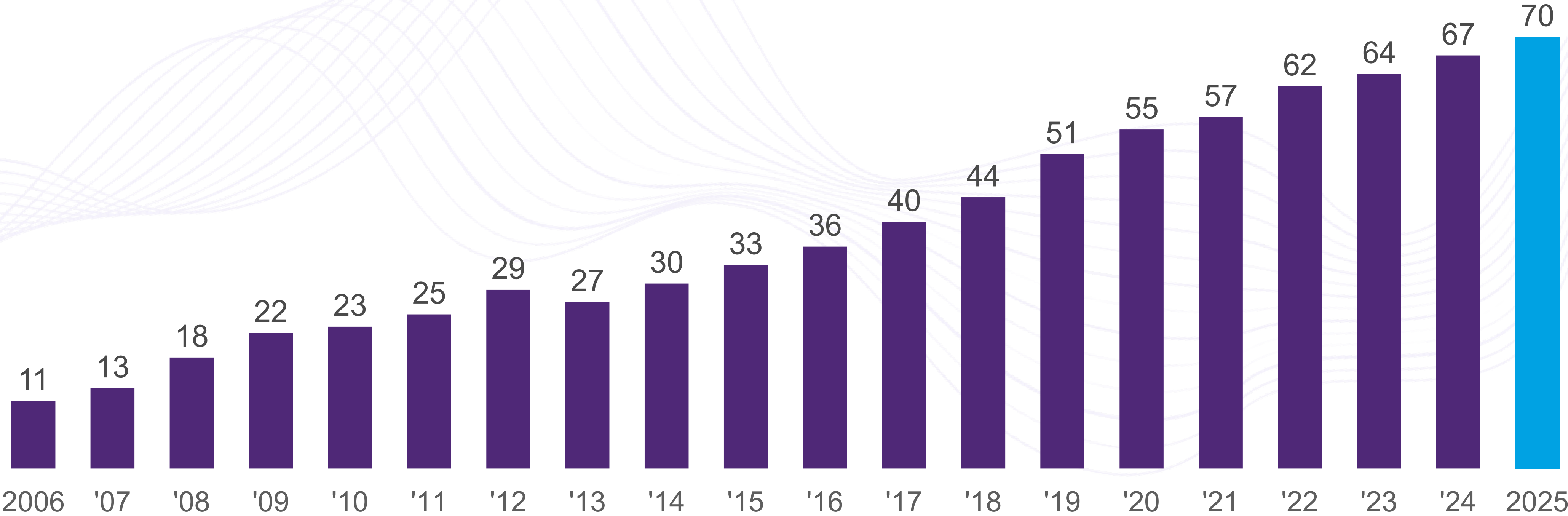
Estimated
245 Million



Ever Listened to a Podcast

TOTAL U.S. POPULATION 12+
% EVER LISTENED TO A PODCAST

Estimated
202 Million



Service used most often to listen to podcasts

% OF U.S. WEEKLY PODCAST LISTENERS 13+ USE EACH SERVICE MOST OFTEN FOR PODCASTS



YouTube
33%



Spotify
26%



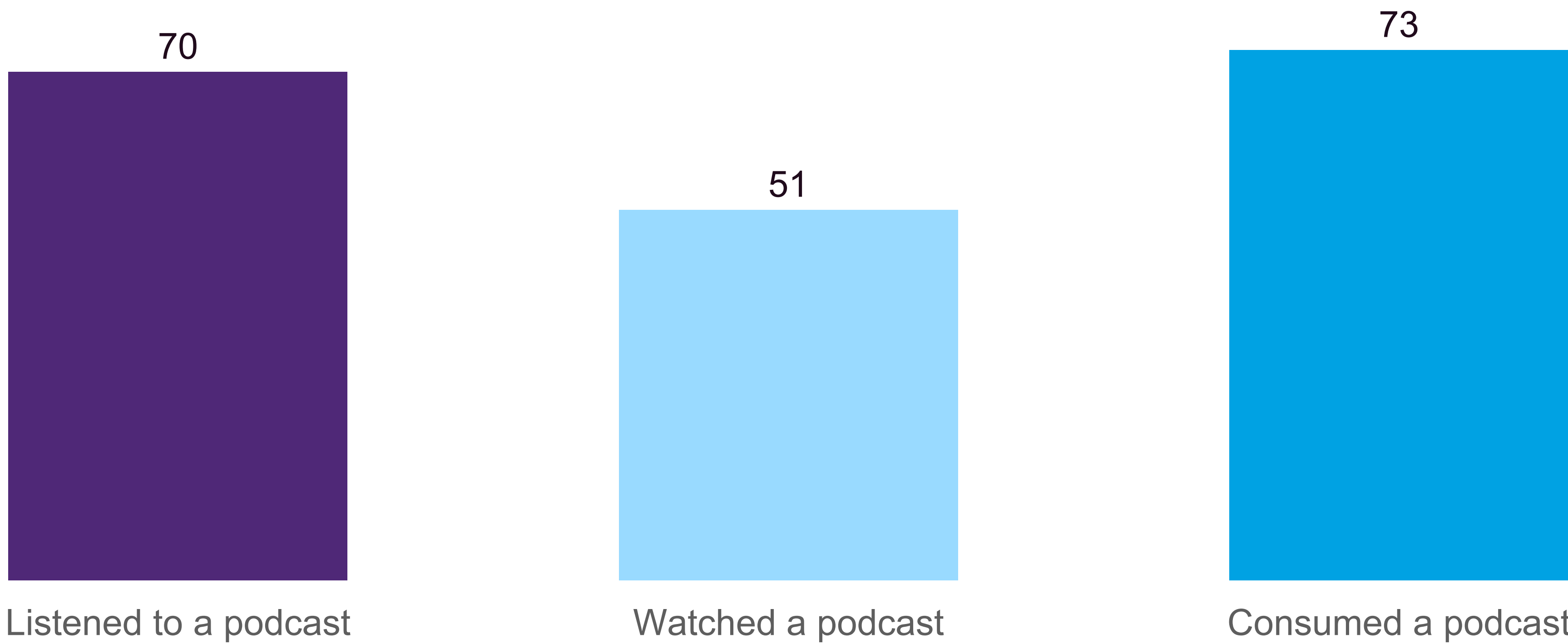
Apple Podcasts
14%

Source: Edison Podcast Metrics Q4 2024



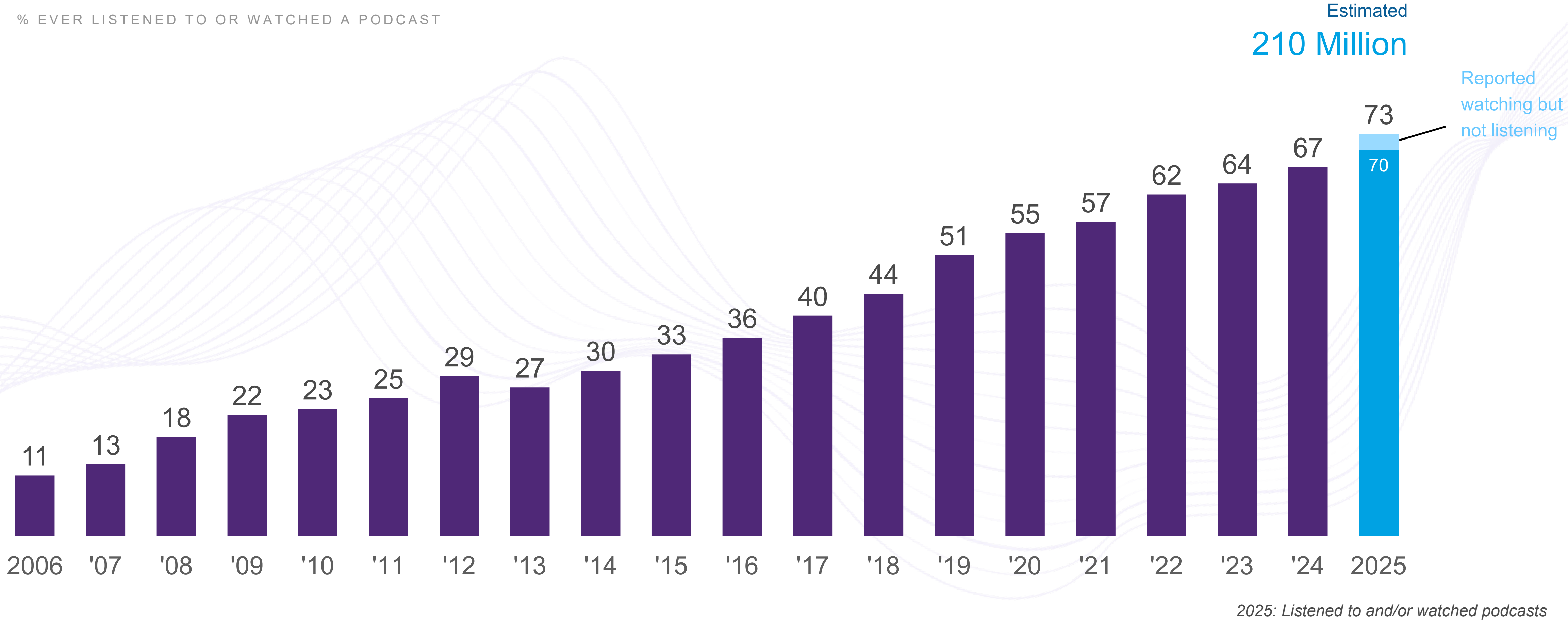
Ever Consumed a Podcast

TOTAL U.S. POPULATION 12+
% EVER LISTENED TO OR WATCHED A PODCAST



Ever Consumed a Podcast

TOTAL U.S. POPULATION 12+
% EVER LISTENED TO OR WATCHED A PODCAST

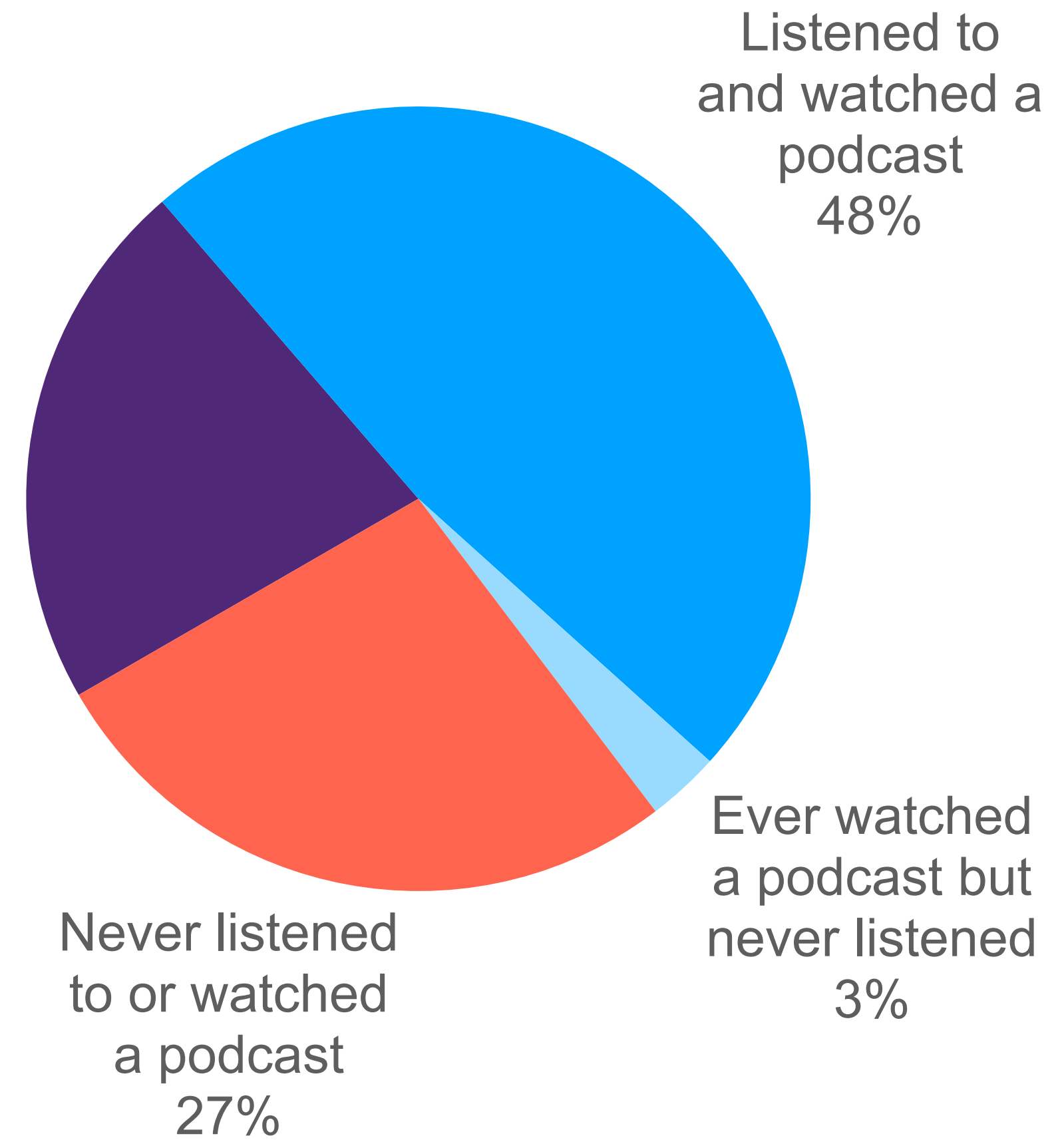


Podcast Consumption Overview

TOTAL U.S. POPULATION 12+



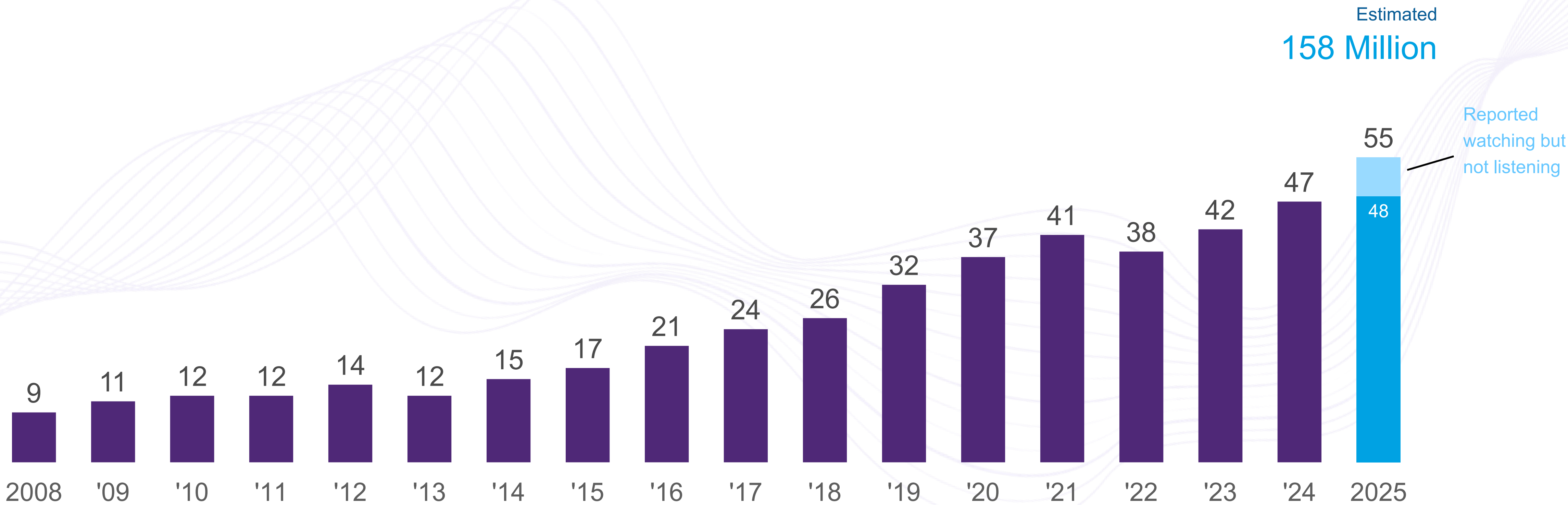
Ever listened
to a podcast
but never
watched
22%



Monthly Podcast Consumption

TOTAL U.S. POPULATION 12+

% LISTENED TO OR WATCHED A PODCAST IN THE LAST MONTH



2025: Listened to and/or watched podcasts



Podcasting
achieves new
heights:

55%

of Americans now
monthly consumers

Monthly Podcast Consumption

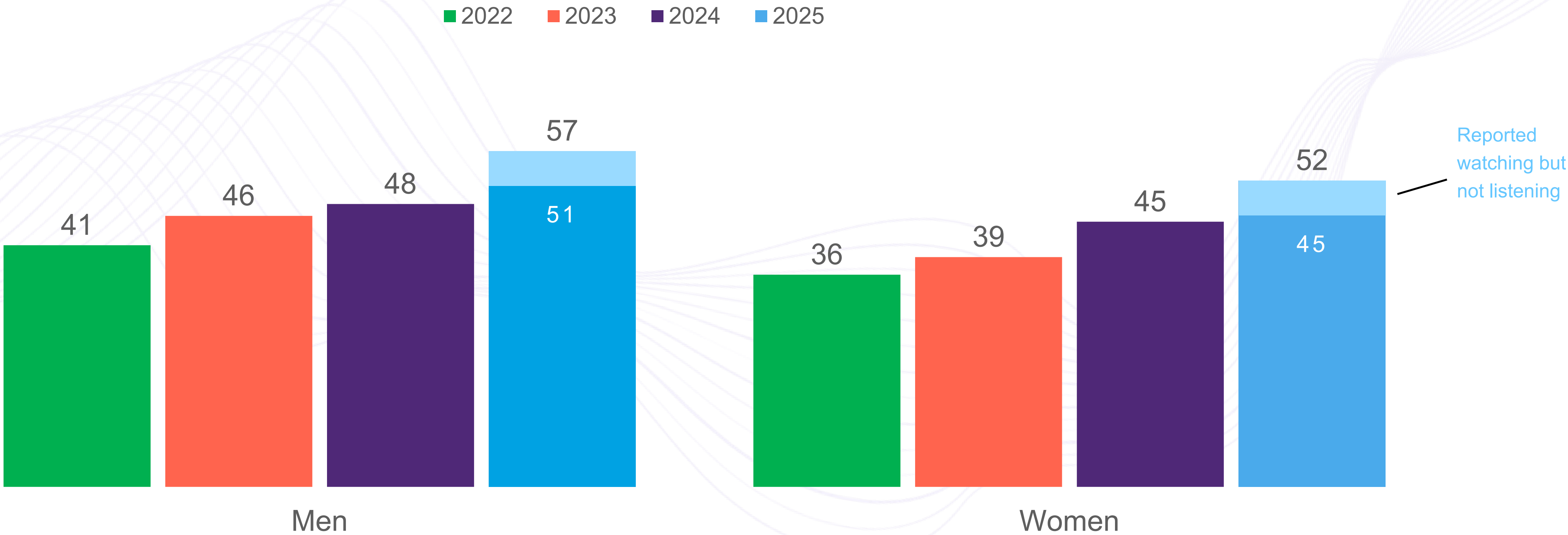
TOTAL U.S. POPULATION 12+
% LISTENED TO OR WATCHED A PODCAST IN THE LAST MONTH



Monthly Podcast Consumption

TOTAL U.S. POPULATION 12+

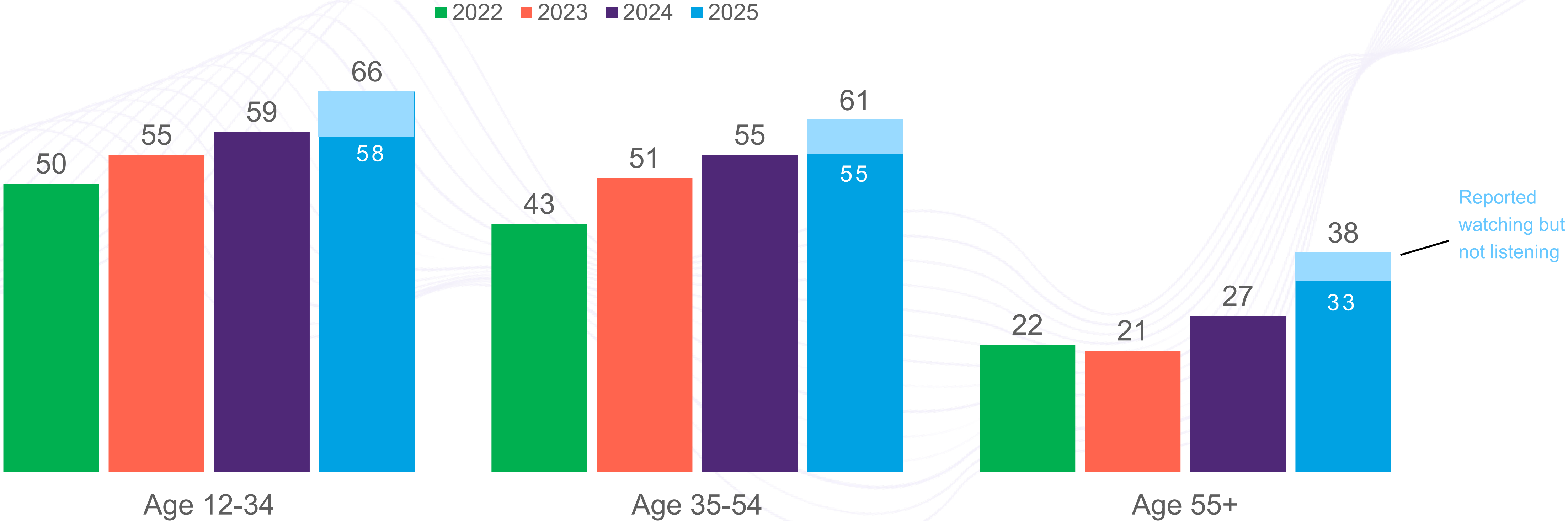
% LISTENED TO OR WATCHED A PODCAST IN THE LAST MONTH



Monthly Podcast Consumption

TOTAL U.S. POPULATION 12+

% LISTENED TO OR WATCHED A PODCAST IN THE LAST MONTH

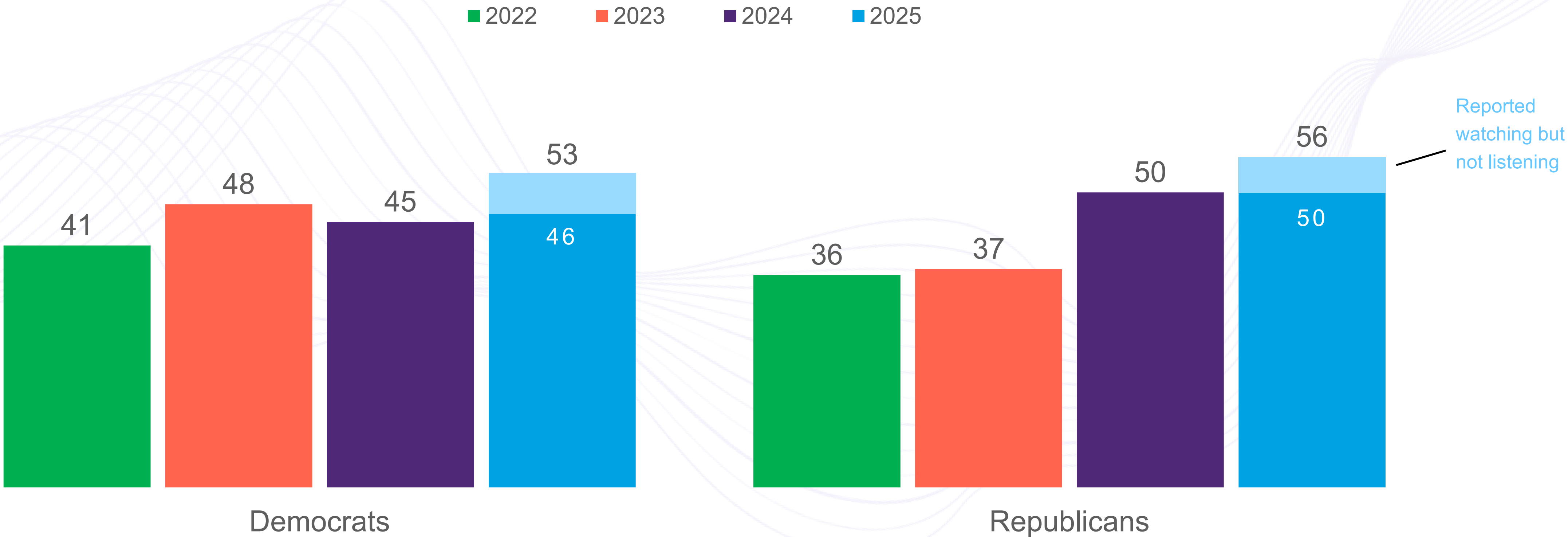


2025: Listened to and/or watched podcasts

Monthly Podcast Consumption

TOTAL U.S. POPULATION 18+

% LISTENED TO OR WATCHED A PODCAST IN THE LAST MONTH

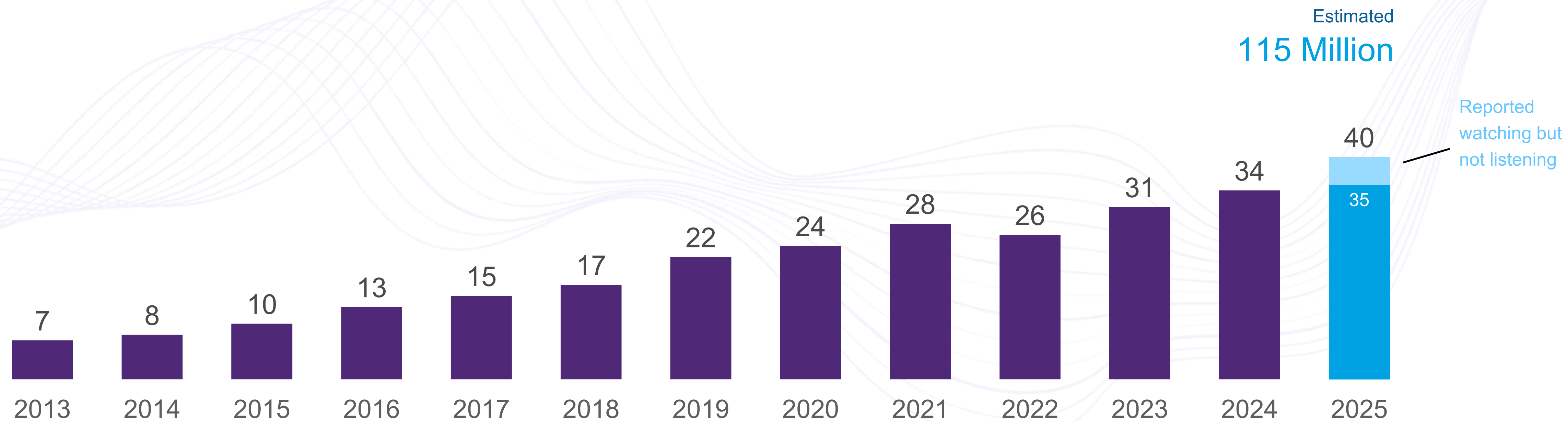


2025: Listened to and/or watched podcasts

Weekly Podcast Consumption

TOTAL U.S. POPULATION 12+

% LISTENED TO OR WATCHED A PODCAST IN THE LAST WEEK



2025: Listened to and/or watched podcasts

Weekly Podcast Consumption

TOTAL U.S. POPULATION 12+

% LISTENED TO OR WATCHED A PODCAST IN THE LAST WEEK



 THE INFINITE DIAL® 2025

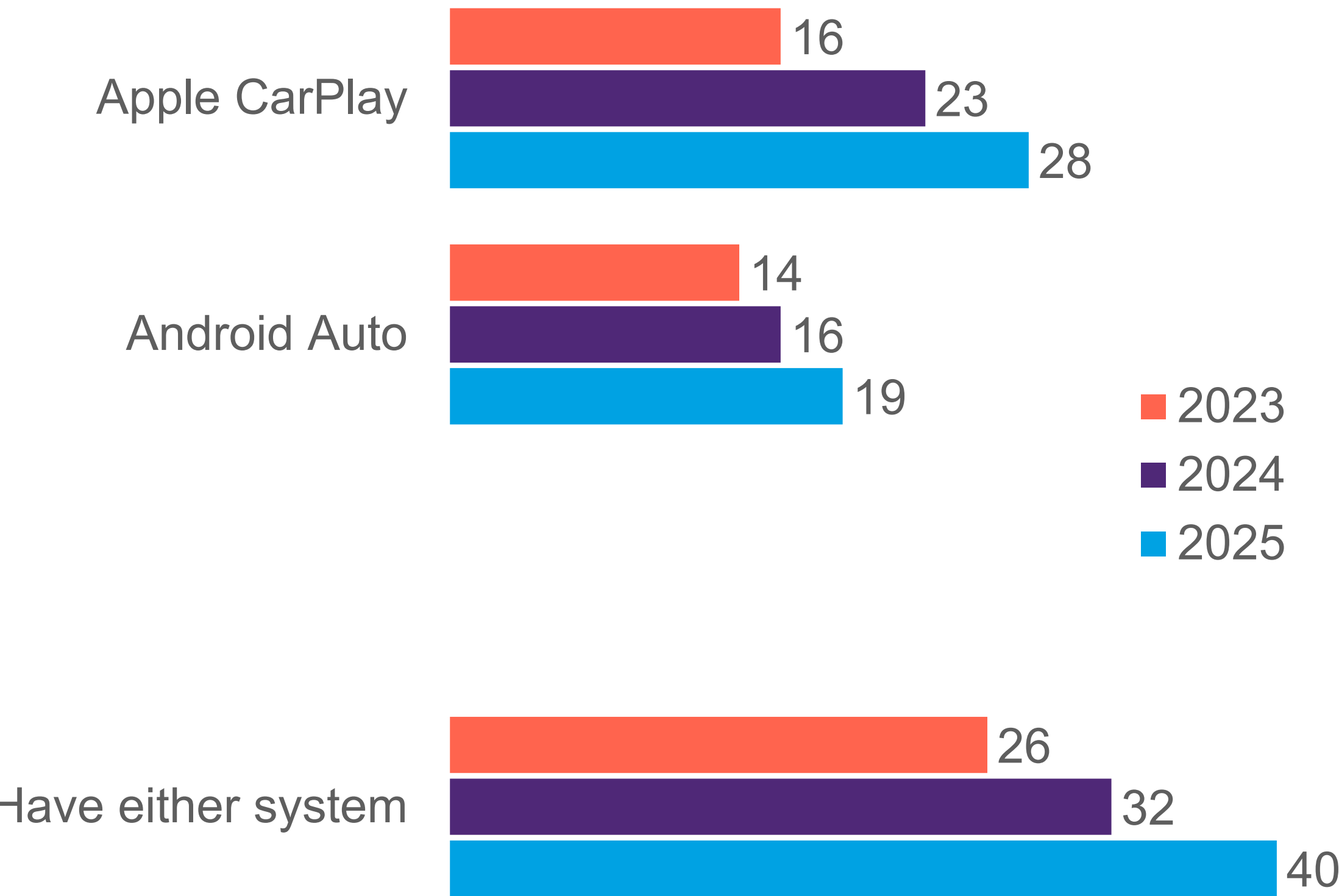
In-Car Media



Have Automotive Phone Integration Systems in Primary Vehicle

BASE: U.S. 18+ WHO HAS DRIVEN/RIDDEN IN CAR LAST MONTH; 88%

% HAVE SYSTEM IN PRIMARY VEHICLE



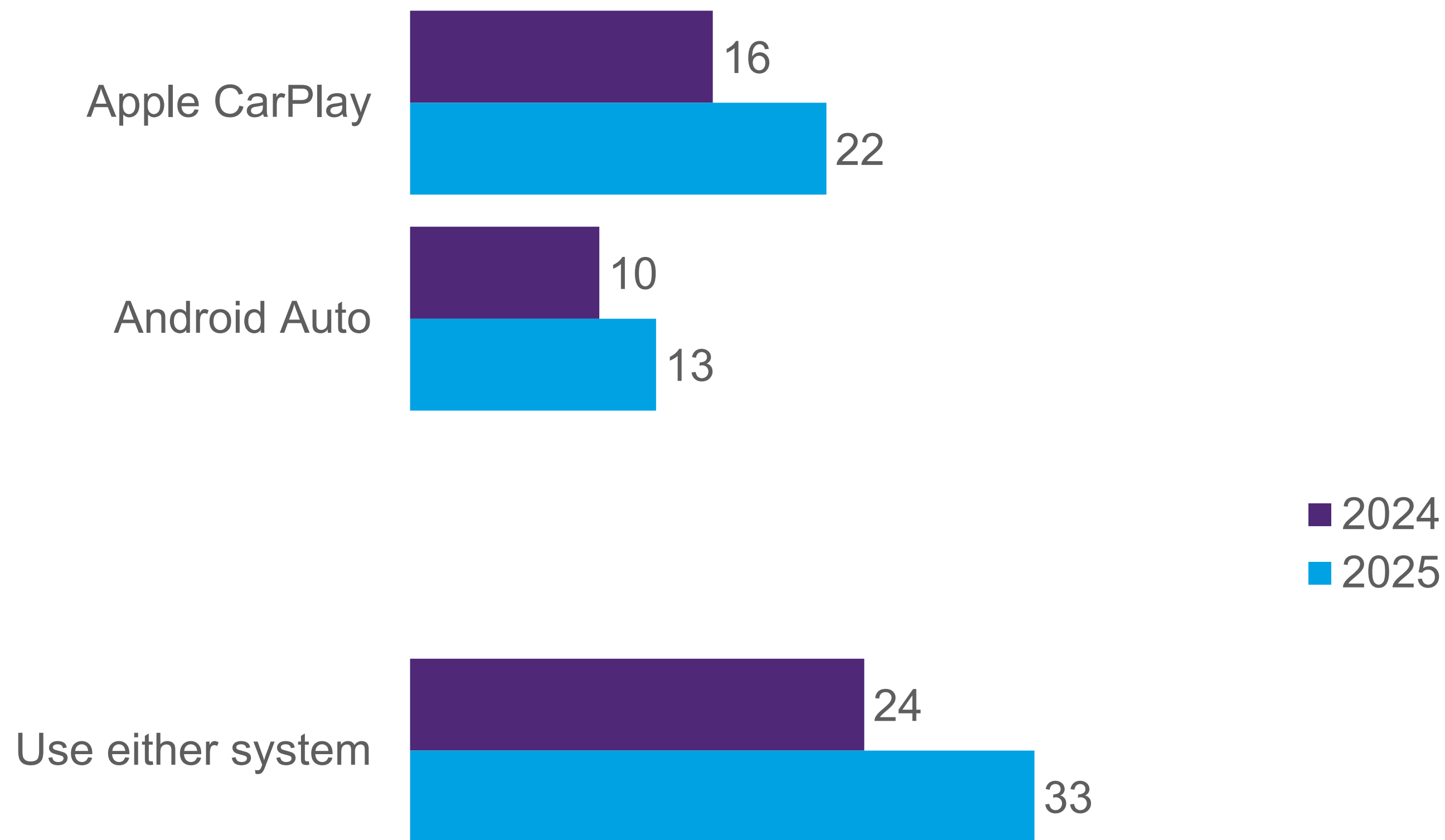
Digital Revolution in The Car



Use Automotive Phone Integration Systems in Primary Vehicle

BASE: U.S. 18+ WHO HAS DRIVEN/RIDDEN IN CAR LAST MONTH; 88%

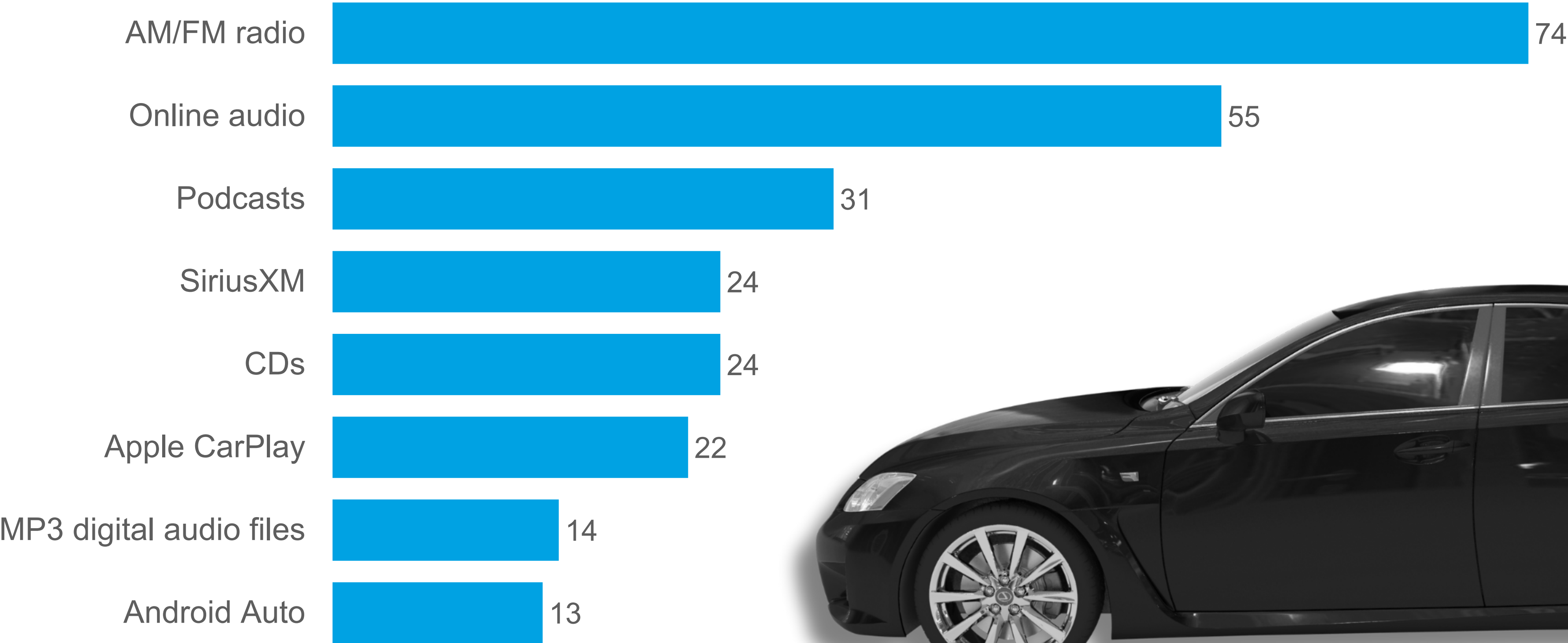
% CURRENTLY EVER USE SYSTEM



Audio Sources Currently Used in Car

BASE: U.S. 18+ WHO HAS DRIVEN/RIDDEN IN CAR LAST MONTH; 88%

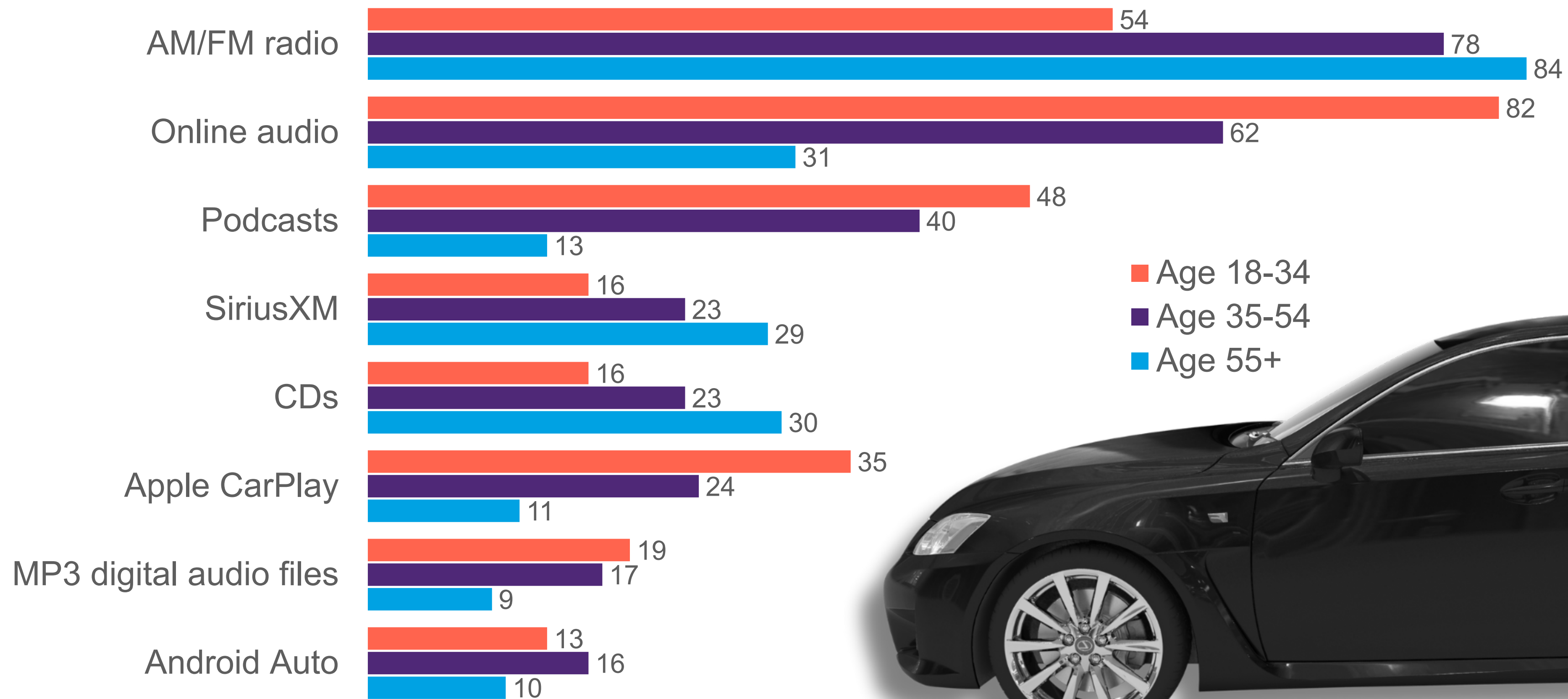
% CURRENTLY USE AUDIO SOURCE IN PRIMARY CAR



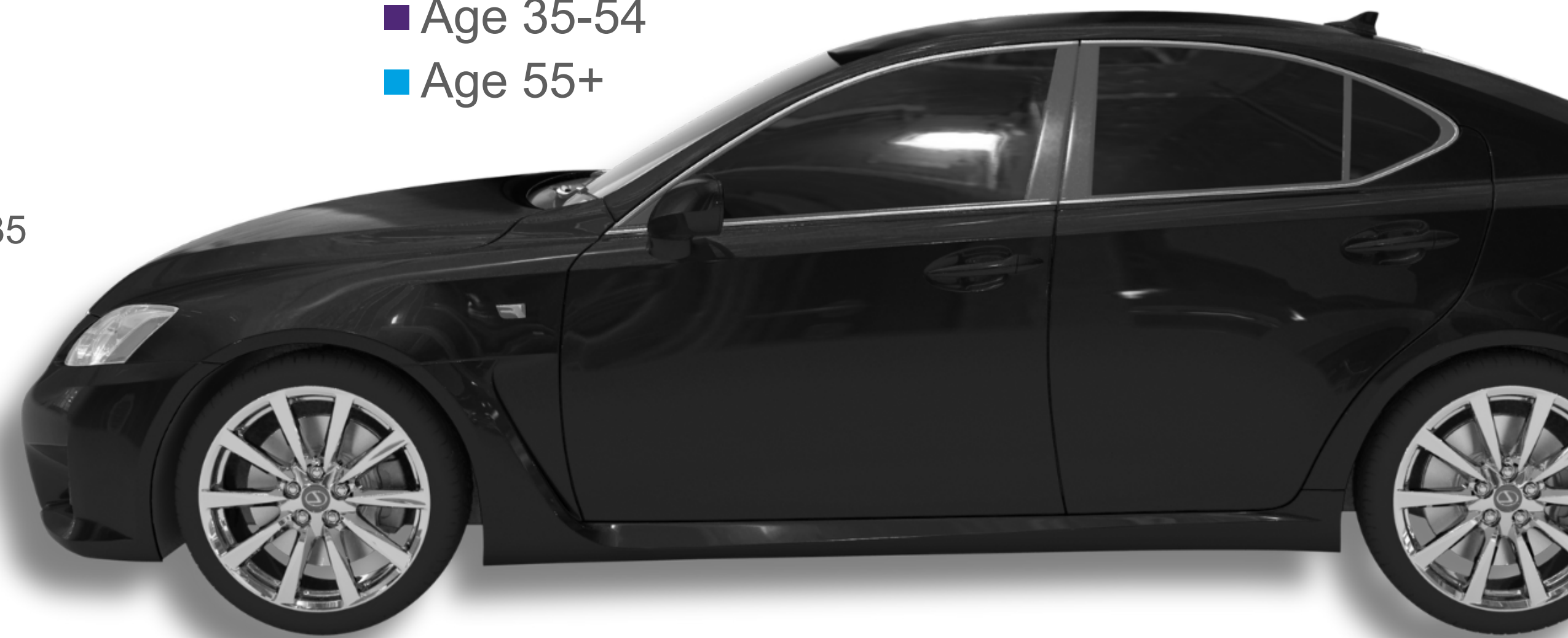
Audio Sources Currently Used in Car

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

% CURRENTLY USE AUDIO SOURCE IN PRIMARY CAR



■ Age 18-34
■ Age 35-54
■ Age 55+



Observations

- → Podcast consumption is at an all-time high
- → Audio consumption for podcasts continues to grow, but podcasts using video are attracting more podcast consumers to the medium
- → Online audio adoption is at an all-time high

Observations

- → Car audio is becoming increasingly digital
- → Social media usage continues to expand
- → Strong public support for social media regulation



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