

**The Infinite Dial
2014**

**Online
Radio**

**Music
Discovery**

**Social
Networking**

Podcasting

Smartphones

In-Car Media



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The Infinite Dial 2014



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Methodology Overview

- In January/February 2014, Edison Research conducted a national telephone survey of 2,023 people aged 12 and older, using random digit dialing techniques.
- Survey offered in both English and Spanish languages.
- Both landlines and cell phones were called.
- Data weighted to national 12+ population figures.
- This is the 22nd study in the series dating to 1998.
- These studies provide estimates of digital platforms and their impact on the media landscape based on self-reported consumer behaviors and attitudes.

Online Radio

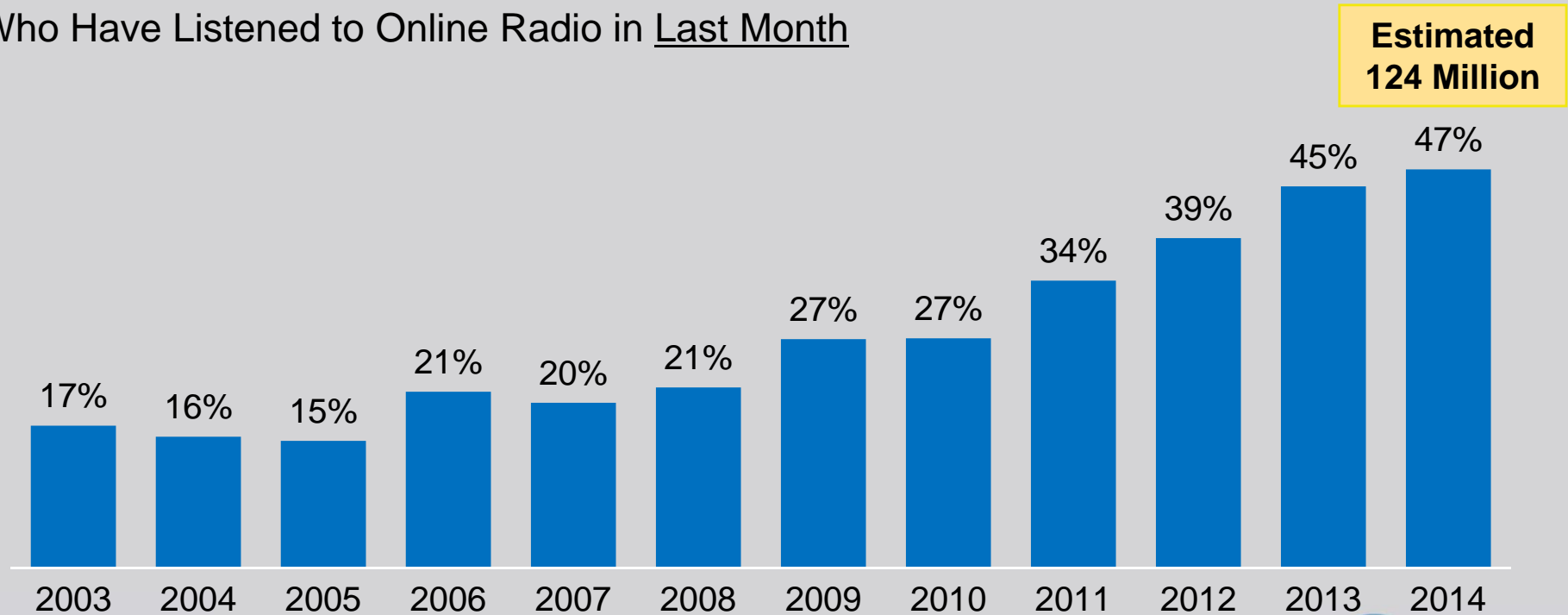


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Monthly Online Radio Audience Approaching Half of Americans

% Who Have Listened to Online Radio in Last Month



Base: Total Population 12+

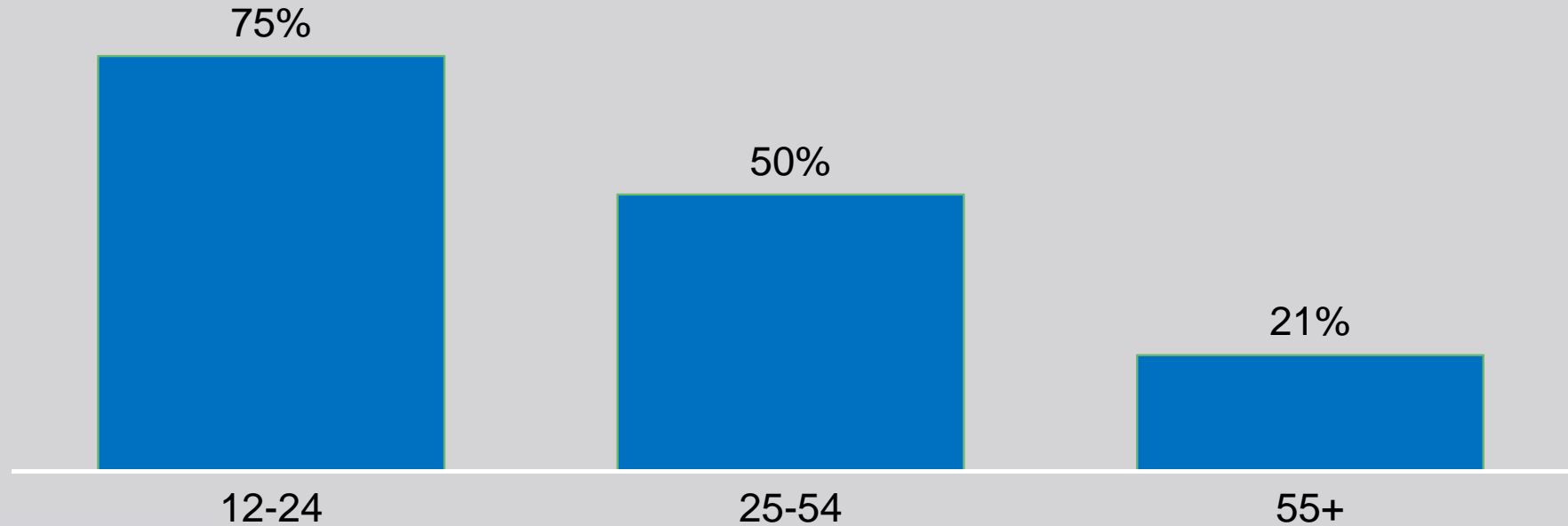


Online Radio = Listening to AM/FM radio stations online and/or listening to streamed audio content available only on the Internet

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Three-Quarters of 12-24s and Half of 25-54s Listen to Online Radio Monthly

% By Age Group Who Have Listened to Online Radio in Last Month



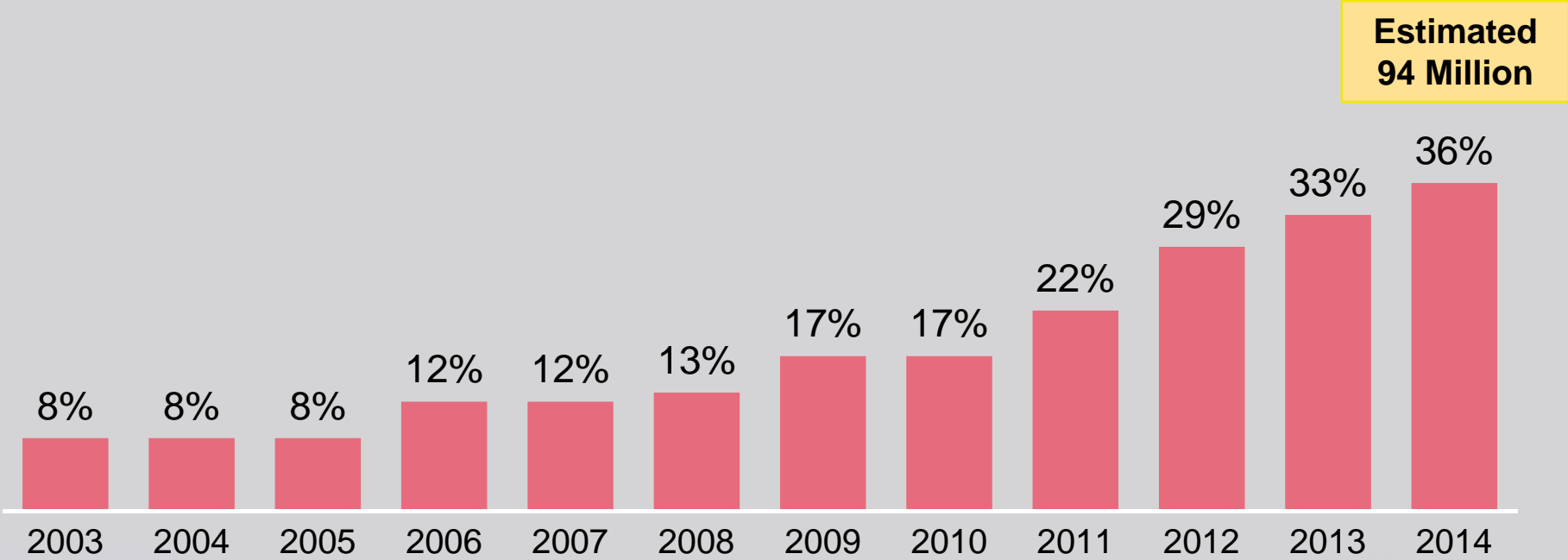
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Online Radio Reaches Estimated 94 Million Weekly

% Who Have Listened to Online Radio in Last Week



Base: Total Population 12+



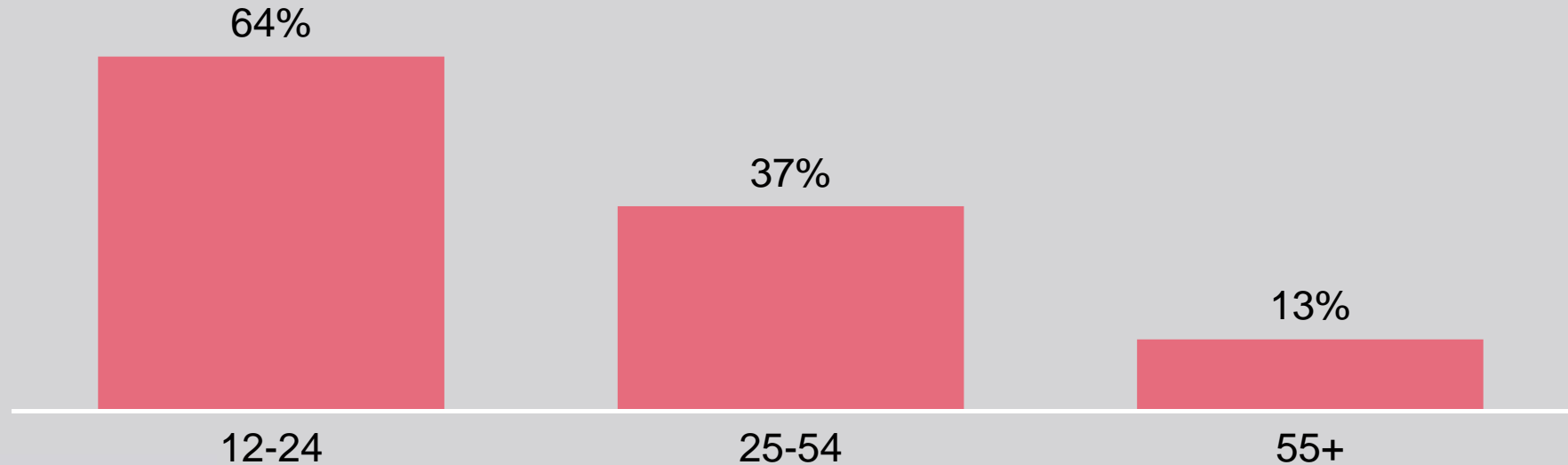
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Just Under Two-Thirds of 12-24s Listen to Online Radio Weekly; More Than One in Three Age 25-54

% By Age Group Who Have Listened to Online Radio in Last Week



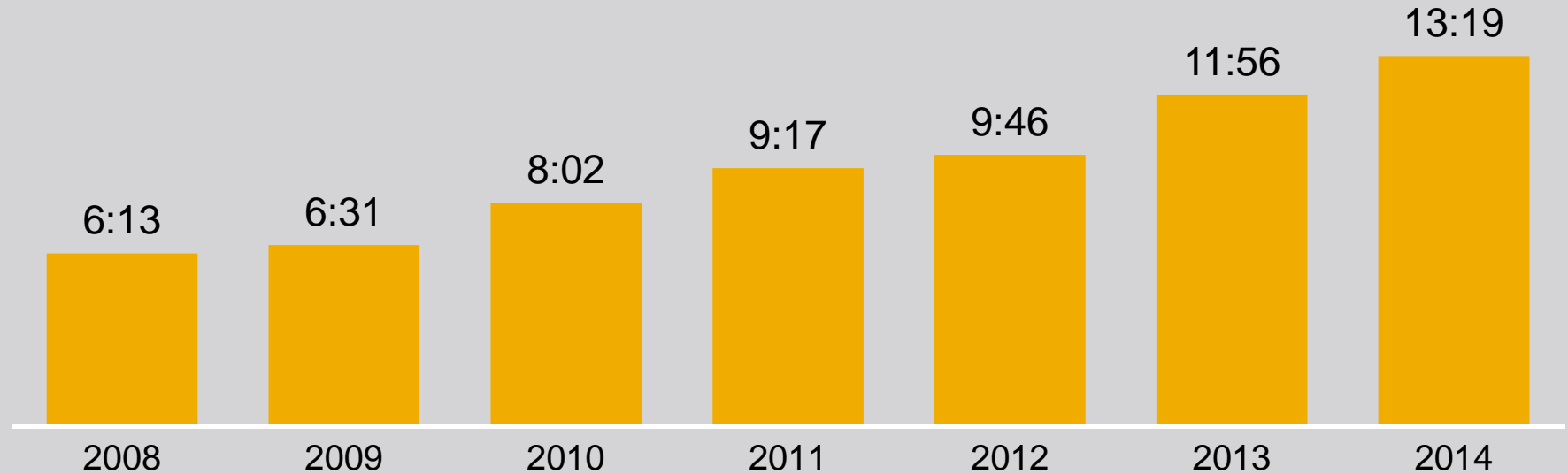
Online Radio = Listening to AM/FM radio stations online and/or listening to streamed audio content available only on the Internet



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Weekly Online Radio Listeners Report More Time Spent Listening Every Year

Average Time Spent per Week With All Sources of Online Radio
(Hours:Minutes)



Base: Weekly Online Radio Listeners

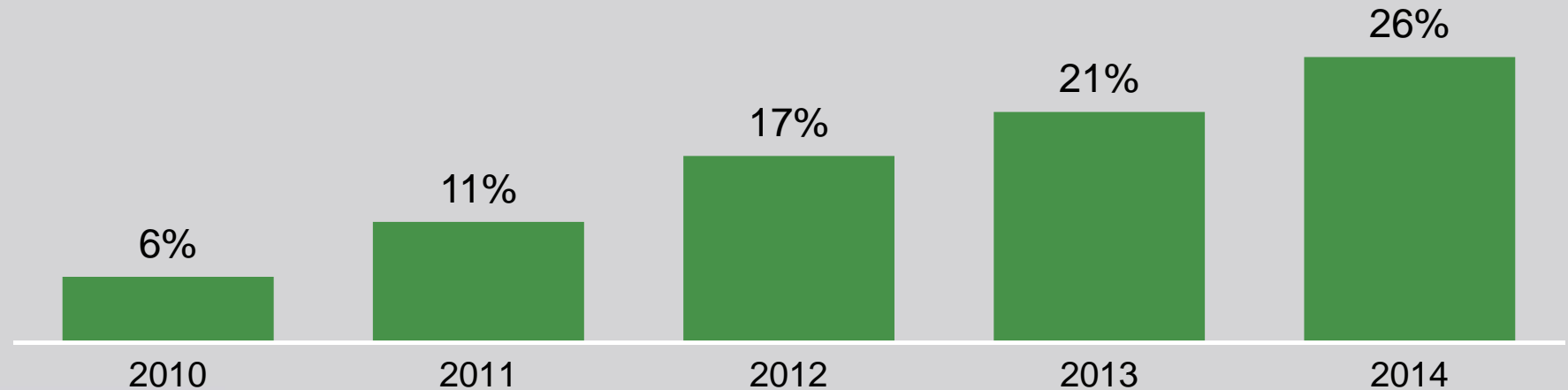
Online Radio = Listening to AM/FM radio stations online and/or listening to streamed audio content available only on the Internet



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Online Radio Listening in a Car Via Cell Phone Continues Steady Increase to 26%

% of Cell Phone Owners Who Have Ever Listened to Online Radio in a Car by Listening to the Stream From a Cell Phone Connected to a Car Audio System



Base: Own a Cell Phone

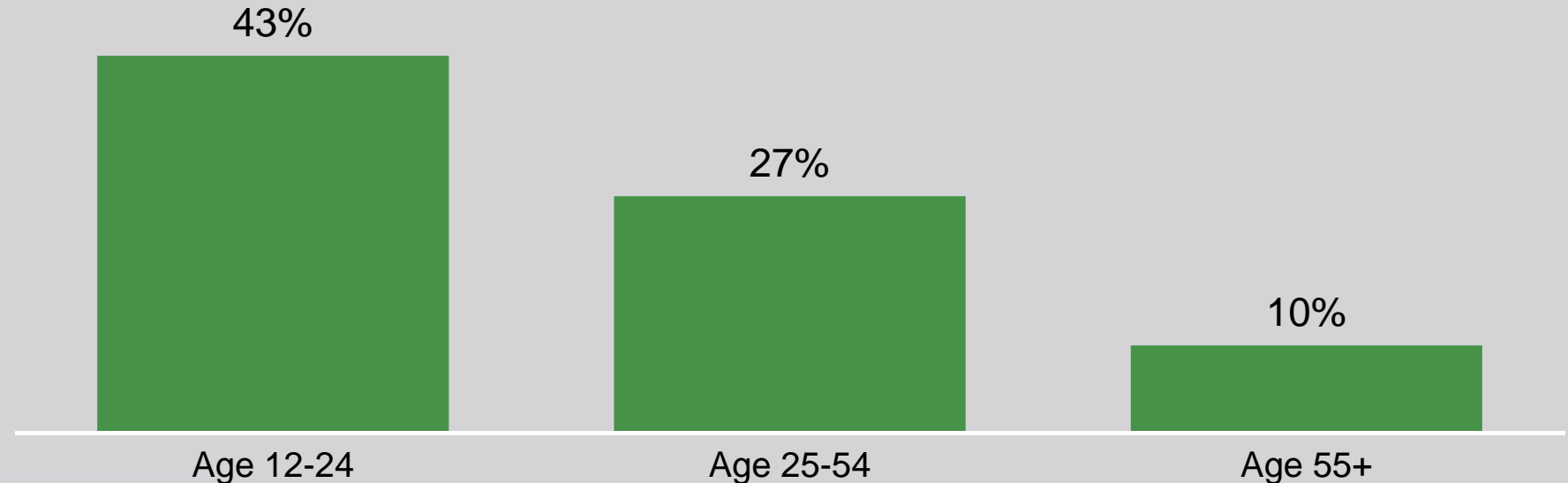
Online Radio = Listening to AM/FM radio stations online and/or listening to streamed audio content available only on the Internet



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A Significant Number of 12-24s Have Listened to Online Radio in a Car Via a Cell Phone

% of Cell Phone Owners By Age Group Who Have Ever Listened to Online Radio in a Car by Listening to the Stream From a Cell Phone Connected to a Car Audio System



Base: Own a Cell Phone

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

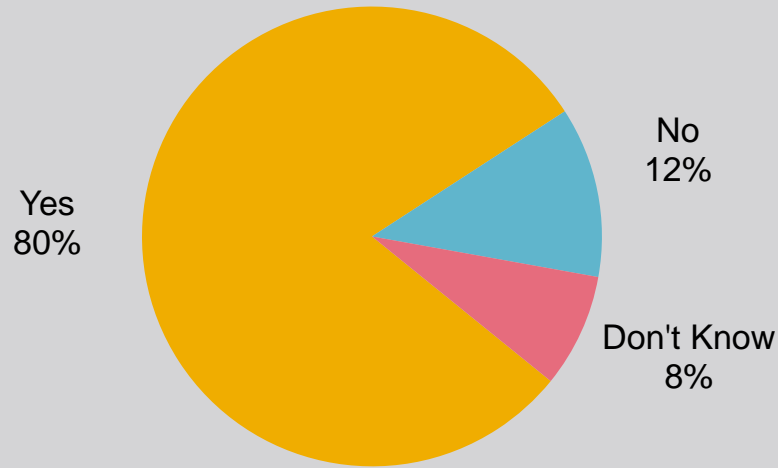


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Vast Majority Say Commercials Are a Fair Price to Pay For Free Audio Content

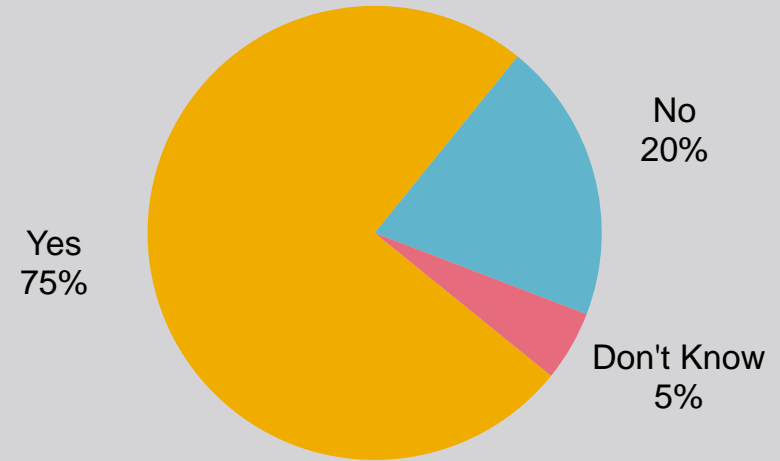
“Would you say listening to commercials is a fair price to pay for free programming on...”

...AM/FM Radio?



Base: Weekly AM/FM Radio Listeners

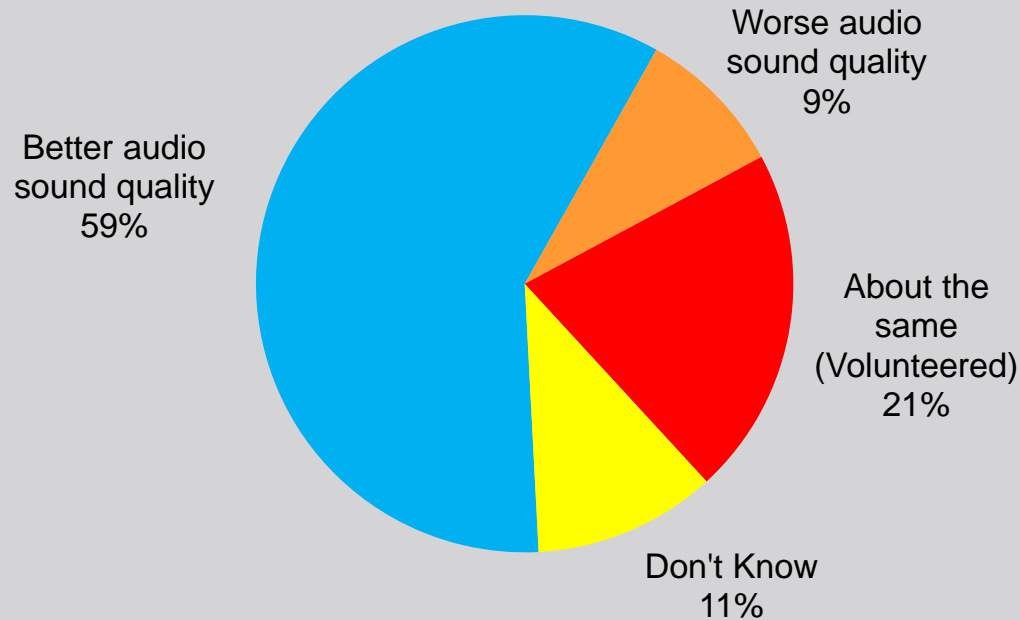
...Internet Audio?



Base: Weekly Online Radio Listeners

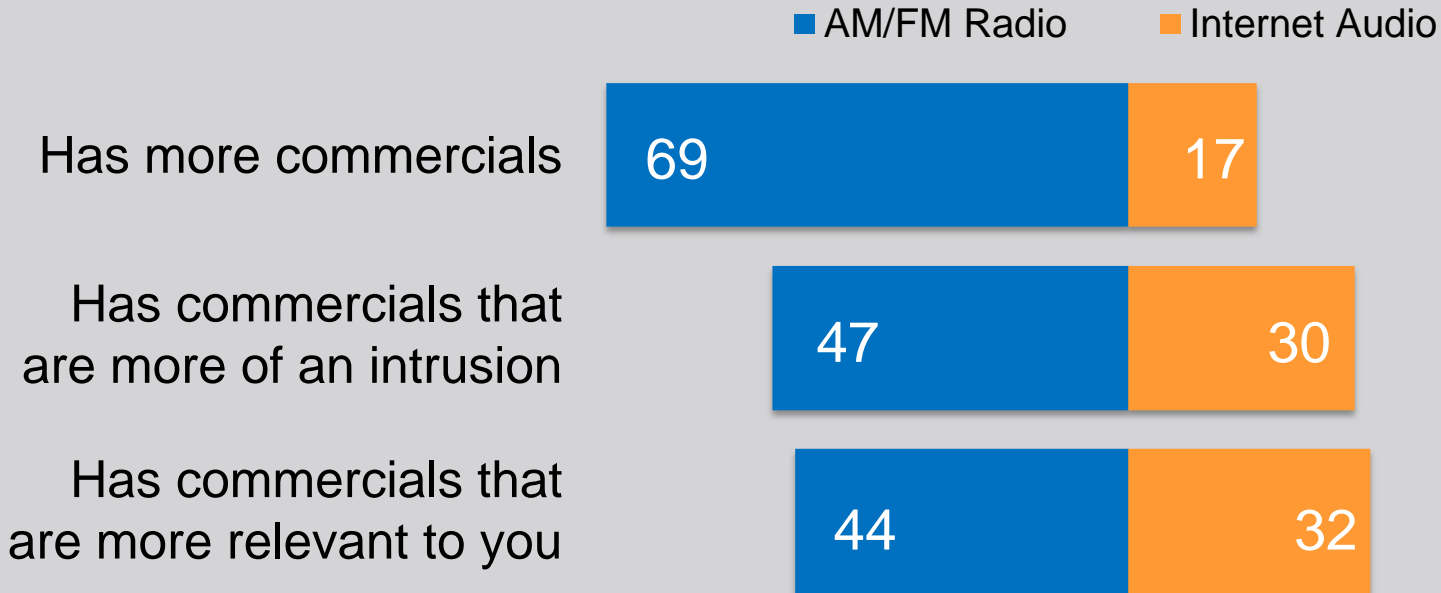
Majority of Online Radio Listeners Say Sound Quality is Better Than “Over-the-Air” AM/FM Radio

“Compared to traditional ‘over-the-air’ AM/FM radio, do you think Internet Audio has...?”



Among Listeners to Both, AM/FM Commercials Seen as More Plentiful, Intrusive and Relevant Than Online Spots

“Think about your listening to AM/FM Radio stations and Internet Audio. Which one...?”



Audio Brands

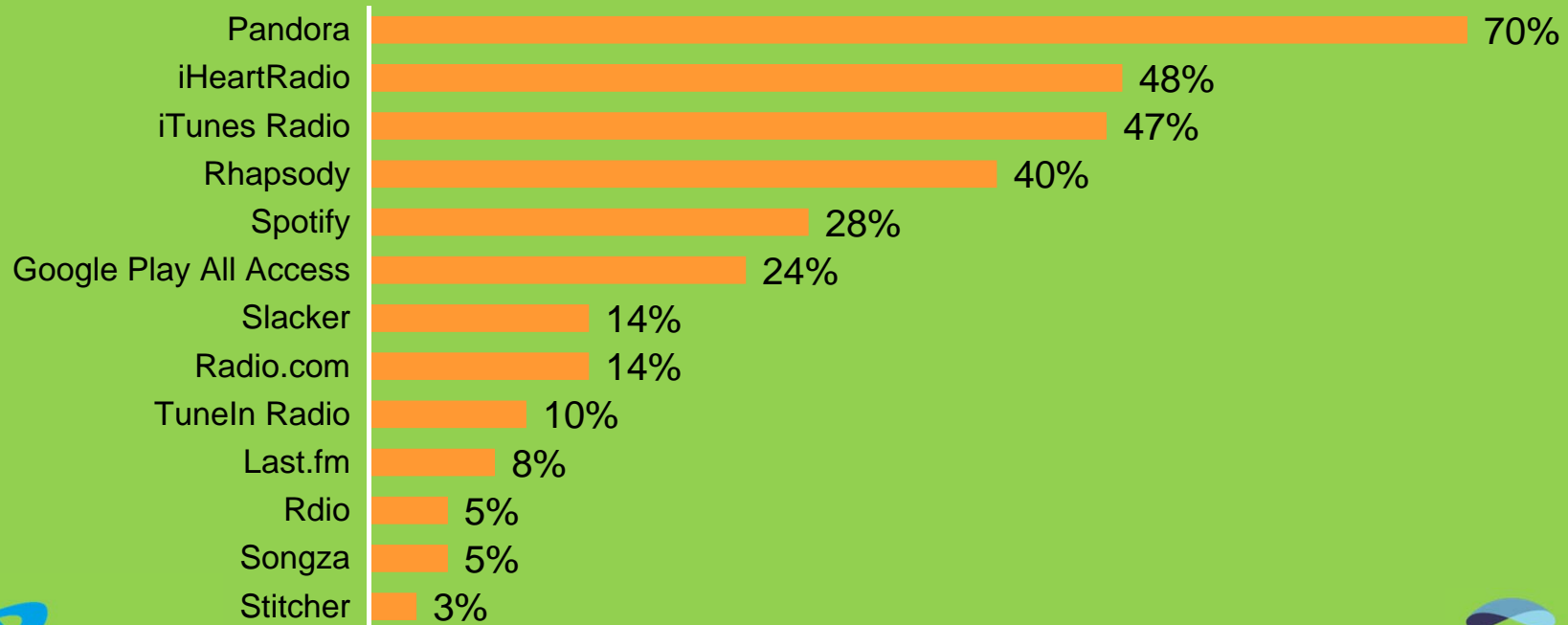


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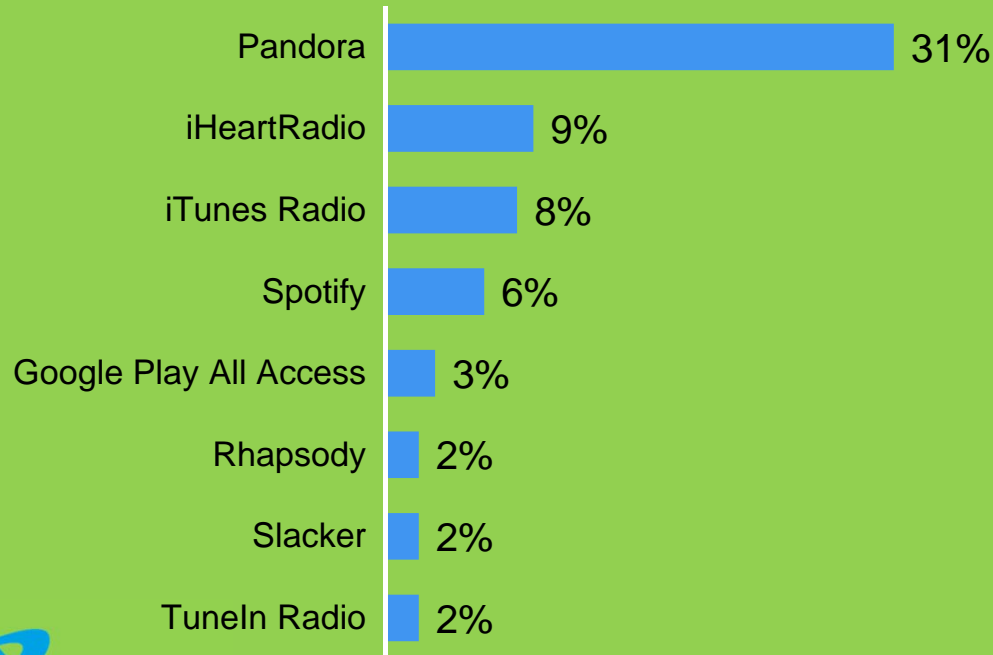
Competition Intensifies in the Internet Audio Space as Many Brands Have Significant Awareness

% Aware of...



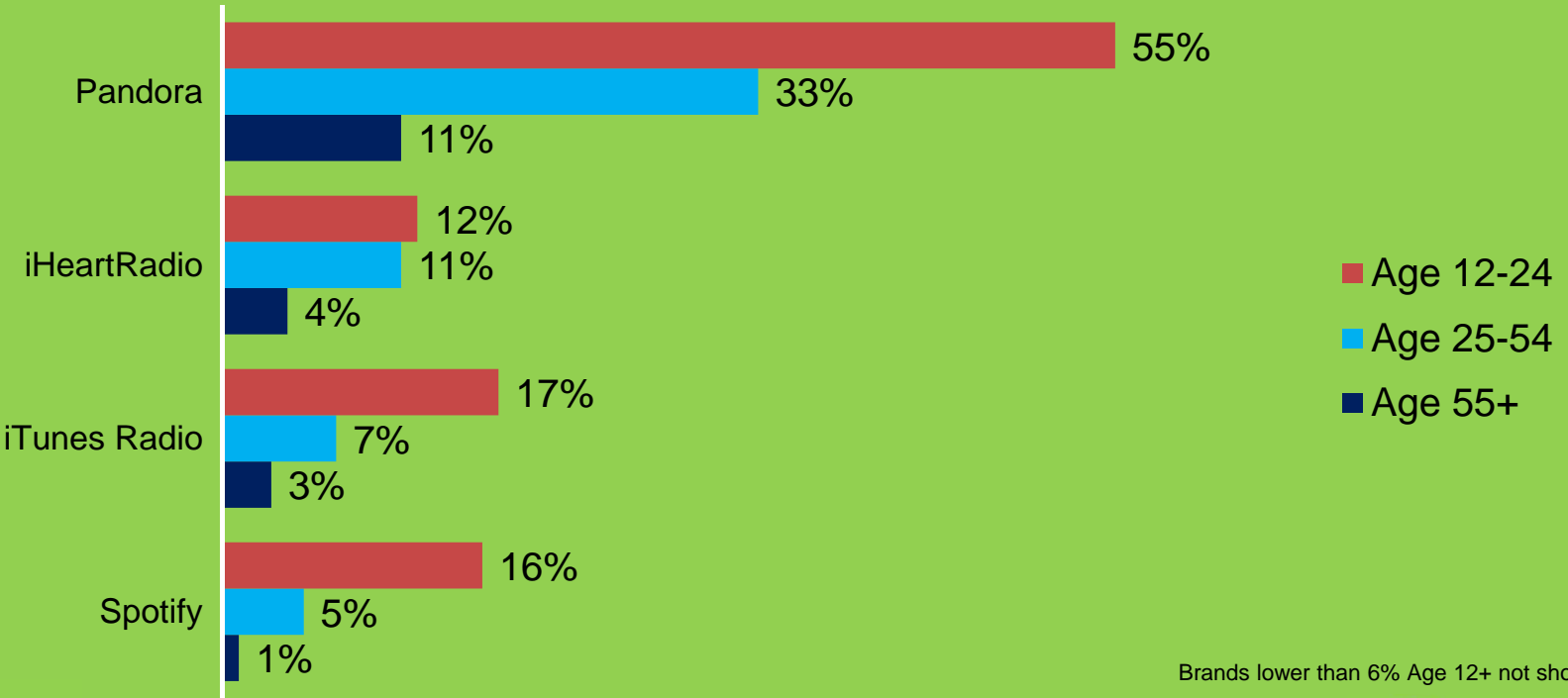
After Launching in September 2013, iTunes Radio Makes an Impressive Debut

% Age 12+ Who Listened in Last Month to...



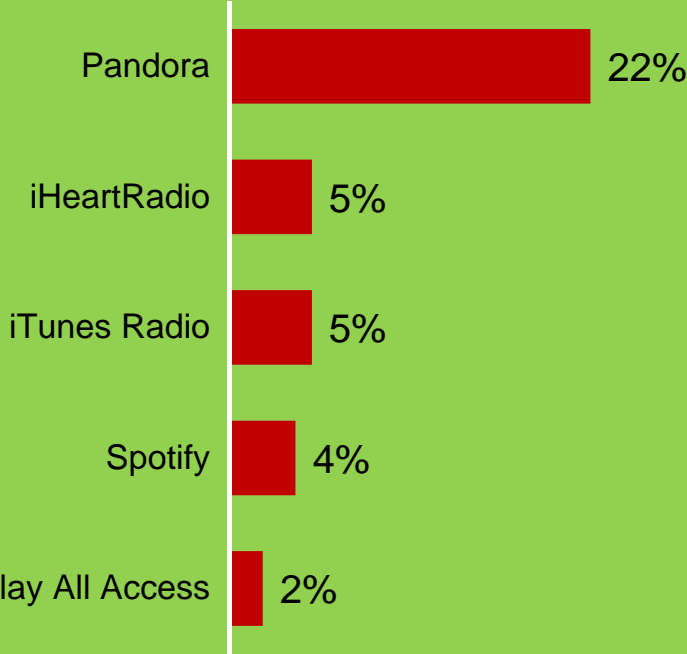
Brands lower than 2% Age 12+ not shown

Percent by Age Group Who Listened in Last Month to...



Pandora Has a Significant Lead for Weekly Usage

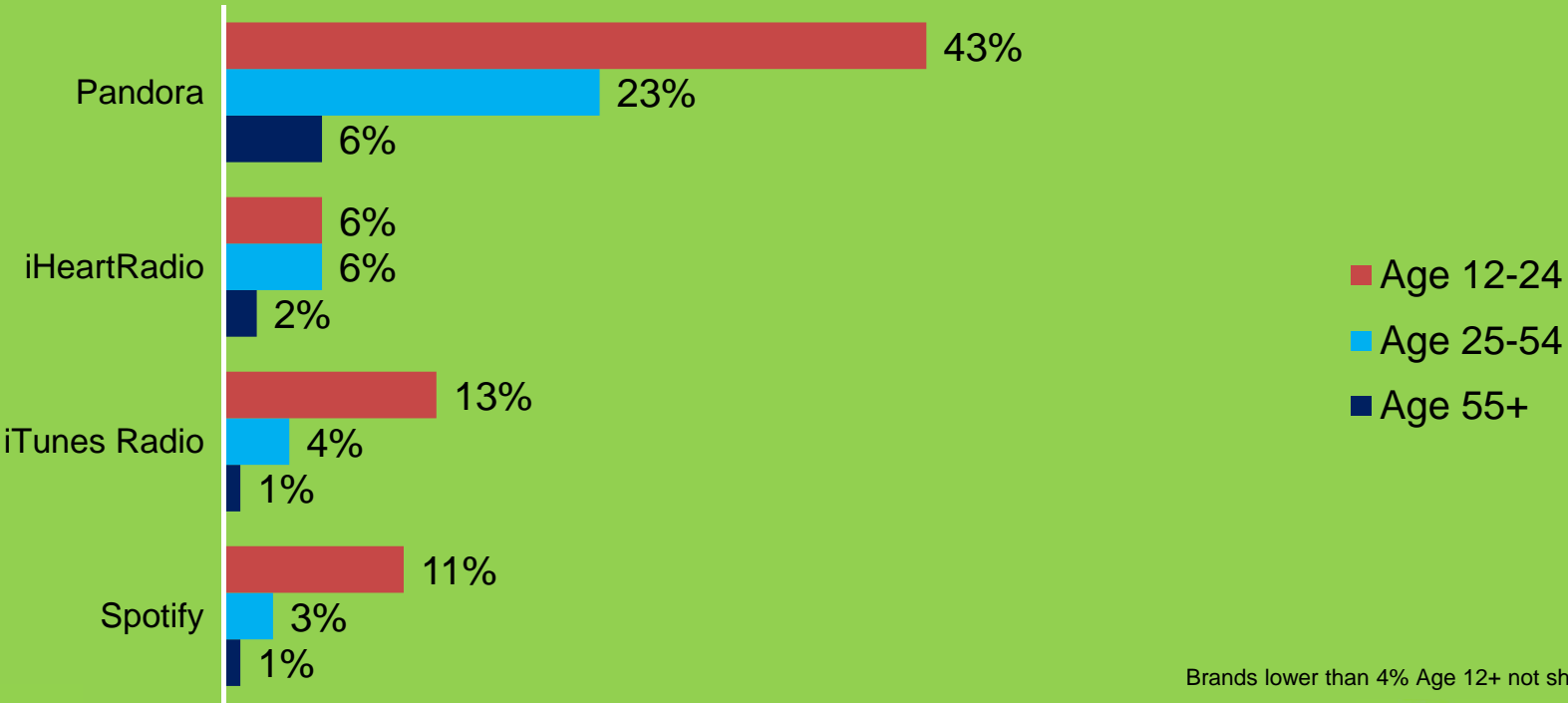
% Age 12+ Who Listened in Last Week to...



Brands lower than 2% Age 12+ not shown

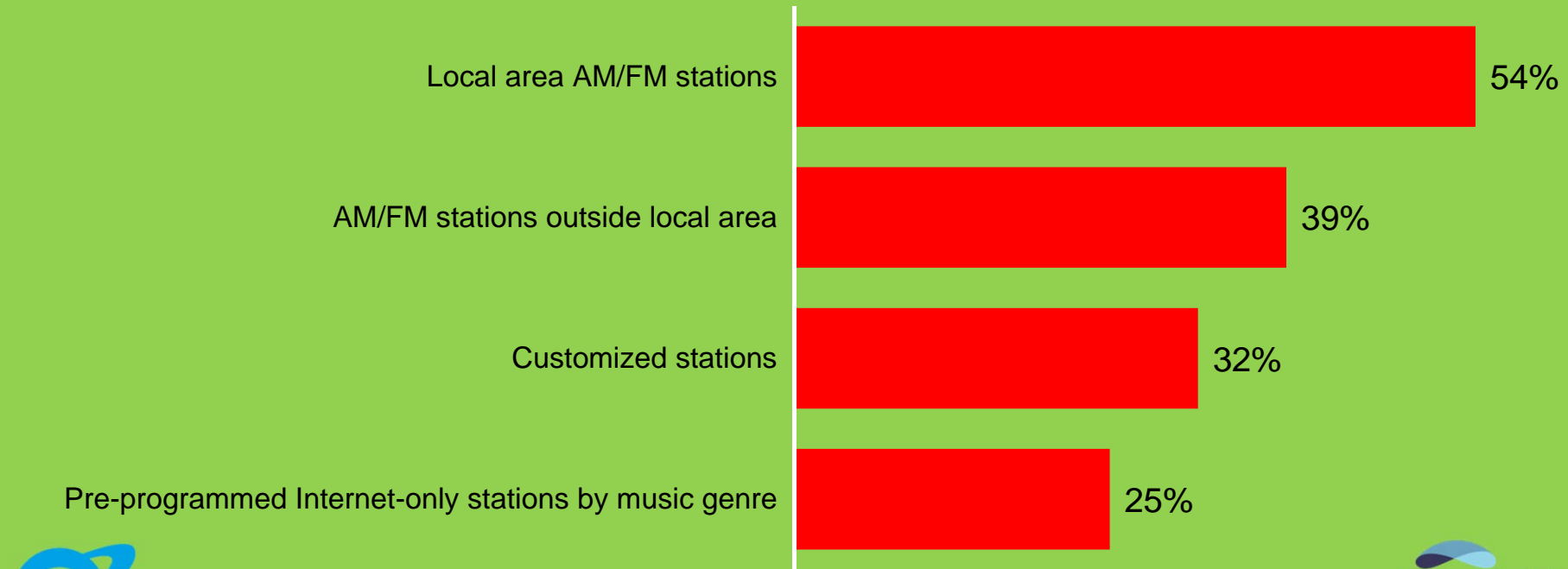


Percent by Age Group Who Listened in Last Week to ...



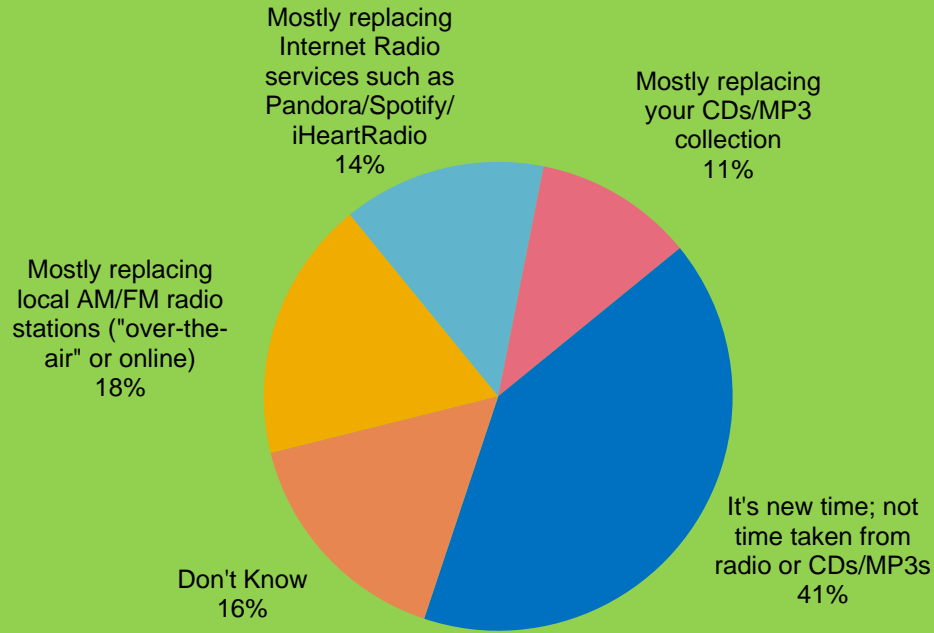
Diverse Feature Set is Driving iHeartRadio Usage

% of iHeartRadio Users Who Have Ever Used the Service to Listen to...



Four in Ten iTunes Radio Listeners Say the Time They Spend Listening is “New Time”

“Is the time you spend listening to iTunes Radio...?”



Base: iTunes Radio Listeners

Beats Music, Which Debuted During This Survey's Field Dates, Has 9% Familiarity



Note: Beats Music launched on 1/21/14, during this survey's fielding dates of 1/13-2/12, 2014



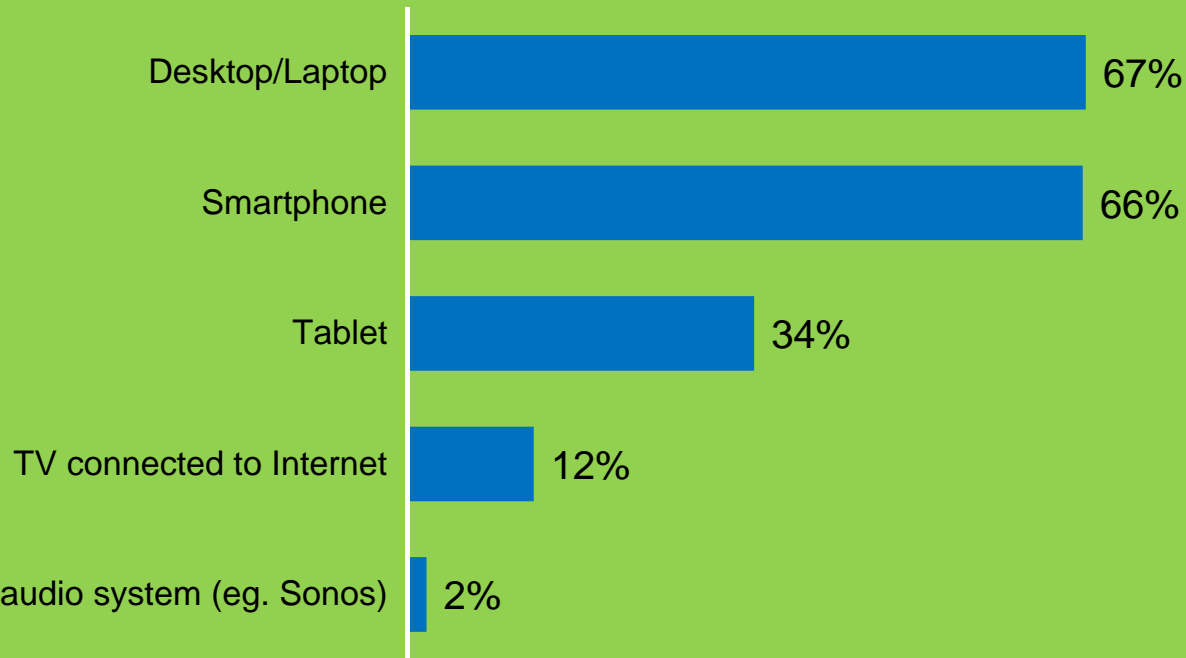
Base: Total Population 12+



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Two-Thirds of Weekly Online Radio Listeners Listen Via Desktop/Laptop and Via Smartphone

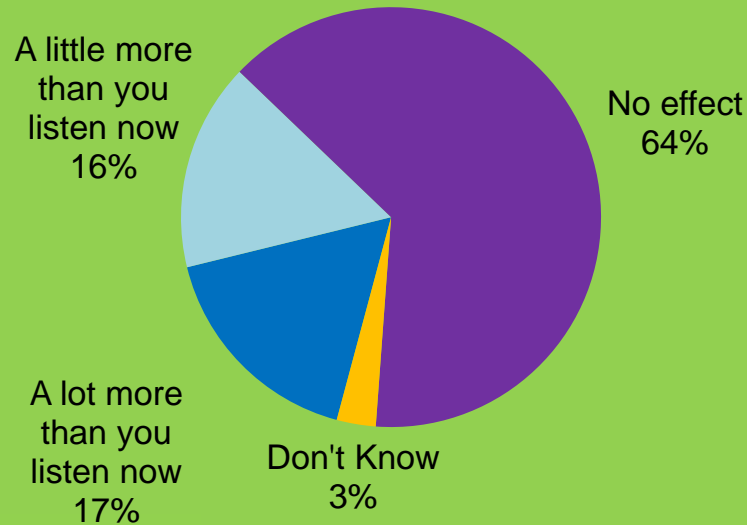
% of Weekly Online Radio Listeners Who Ever Listen Via...



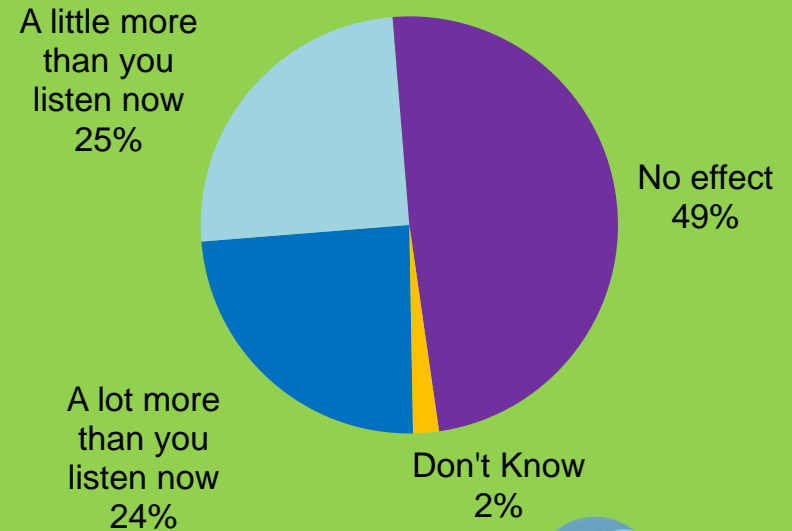
FM Tuner in Cell Phones Could Lead to Increased Listening Among AM/FM Listeners

“If your cell phone had an FM Radio tuner, would it lead you to listen to FM Radio...?”

Total Population 12+

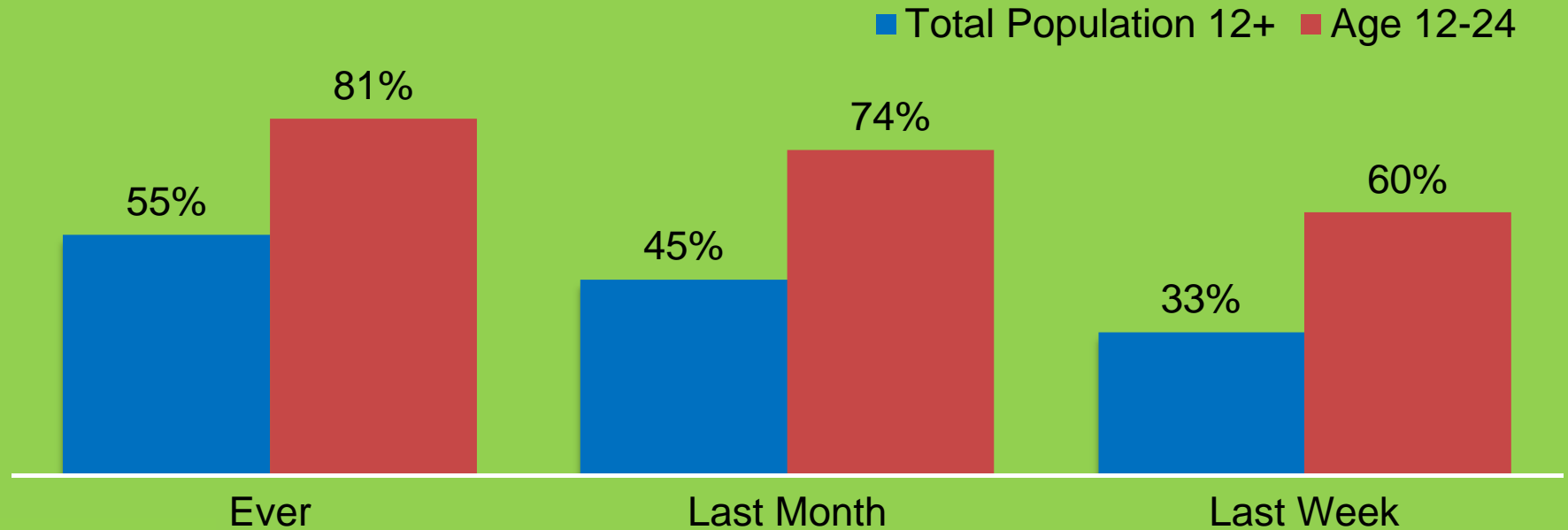


Age 12-24



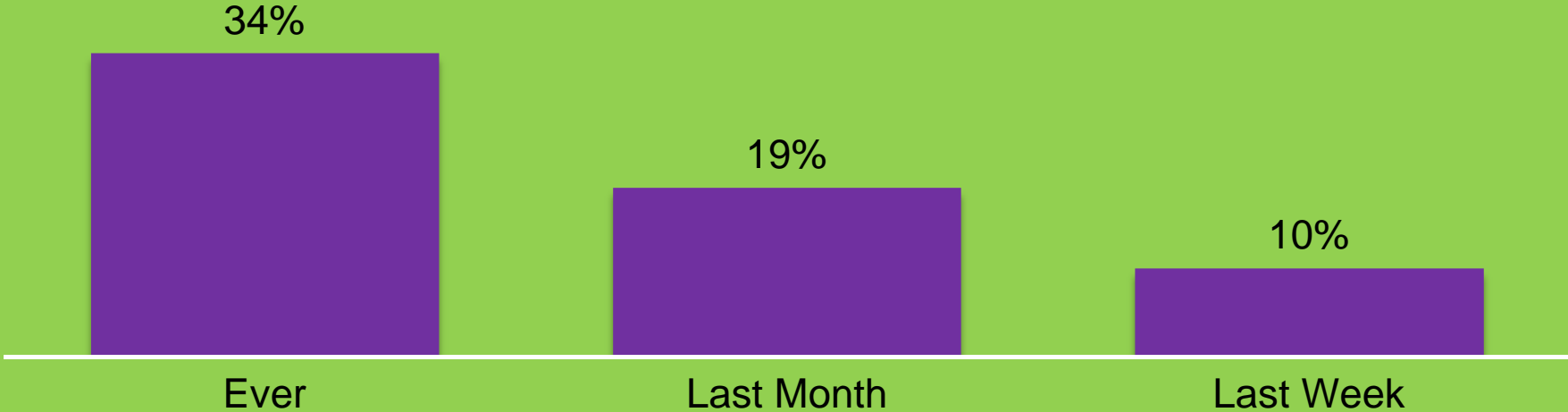
Significant Numbers Use YouTube to Watch Music Videos, Listen to Music

% Who Have Used YouTube to Watch Music Videos or Listen to Music...



Significant Usage of Music Choice TV Channels

% Who Have Listened to “Music Choice” Television Channels...



In-Car Media

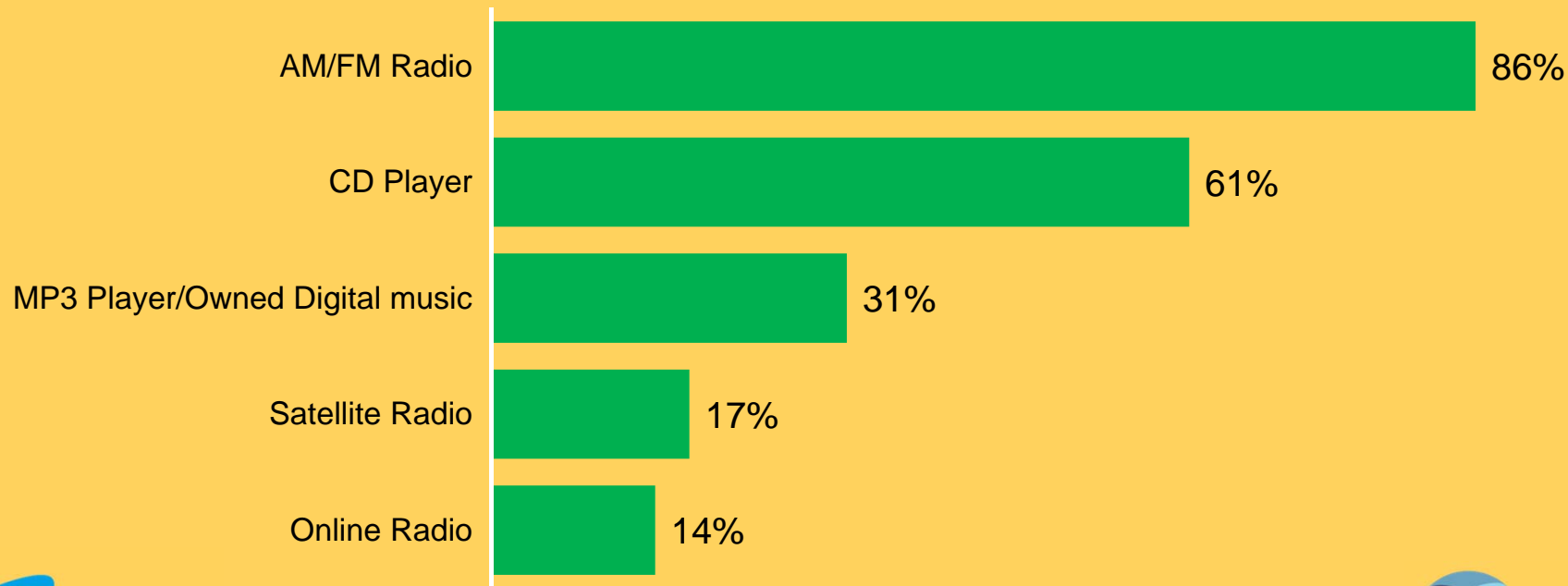


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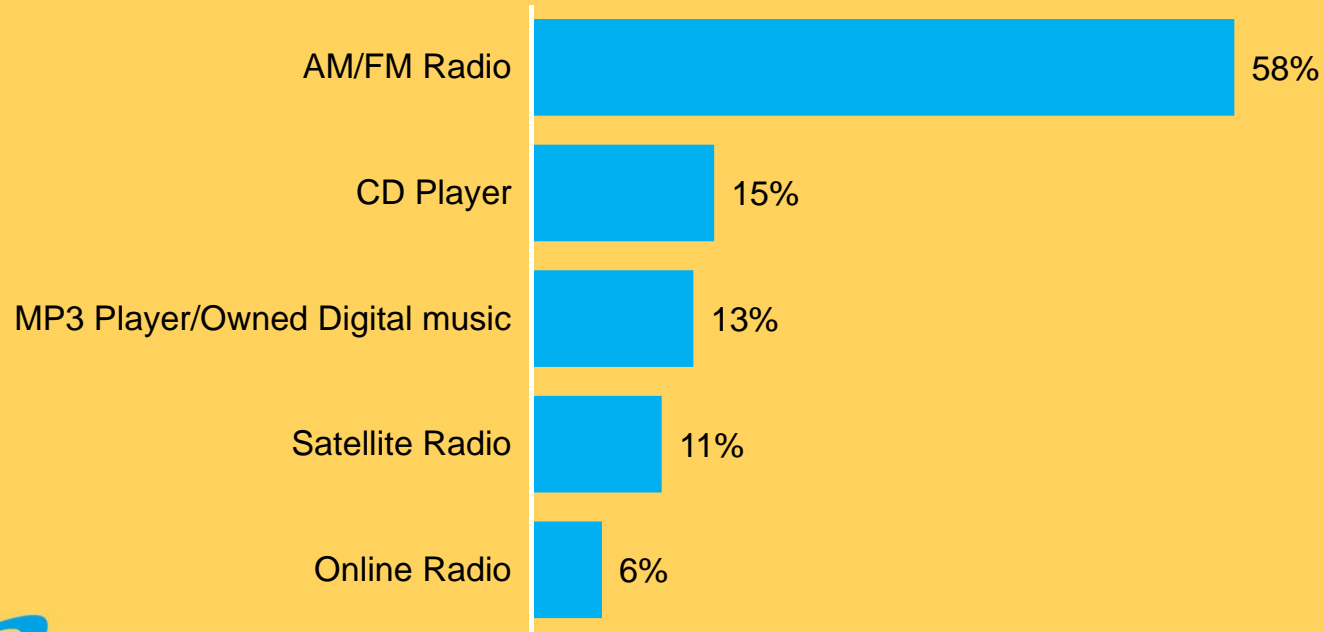
AM/FM Radio Dominates In-Car Media

% Who Currently Ever Use in Primary Car



AM/FM Radio Has Far More Frequent Usage Than Other In-Car Audio Options

% Using “Almost All of the Times” or “Most of the Times” in the Car



In-Dash Information and Entertainment Systems Begin to Show Traction

% With an In-Dash Information/Entertainment System in Primary Car

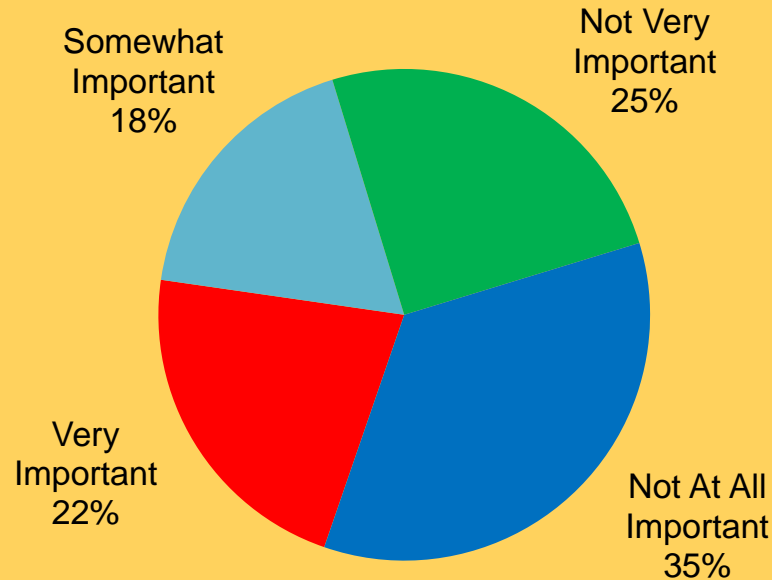


Base: Driven/Ridden in Car in Last Month, age 18+

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Many in the Car-Buying Market Say Having In-Dash System is Very/Somewhat Important

“How important to your next purchase or lease of a new or used vehicle is to have an in-dash system that allows you to receive information and entertainment over the Internet?”



Smartphones and Other Devices



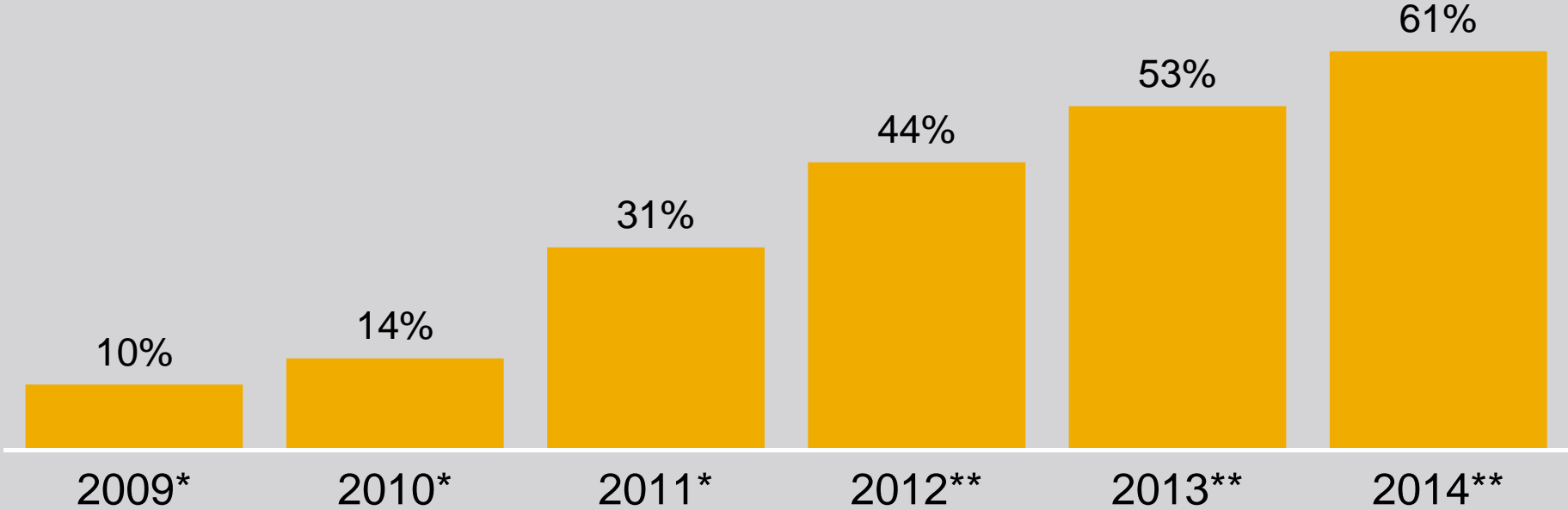
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Over 500% Growth In Smartphone Ownership in Five Years

% Who Own a Smartphone

Estimated
160 Million



*2009-2011: "Is your cell phone a smartphone?"
**2012-2014: Own an Apple iPhone, Android smartphone, BlackBerry, or Windows smartphone

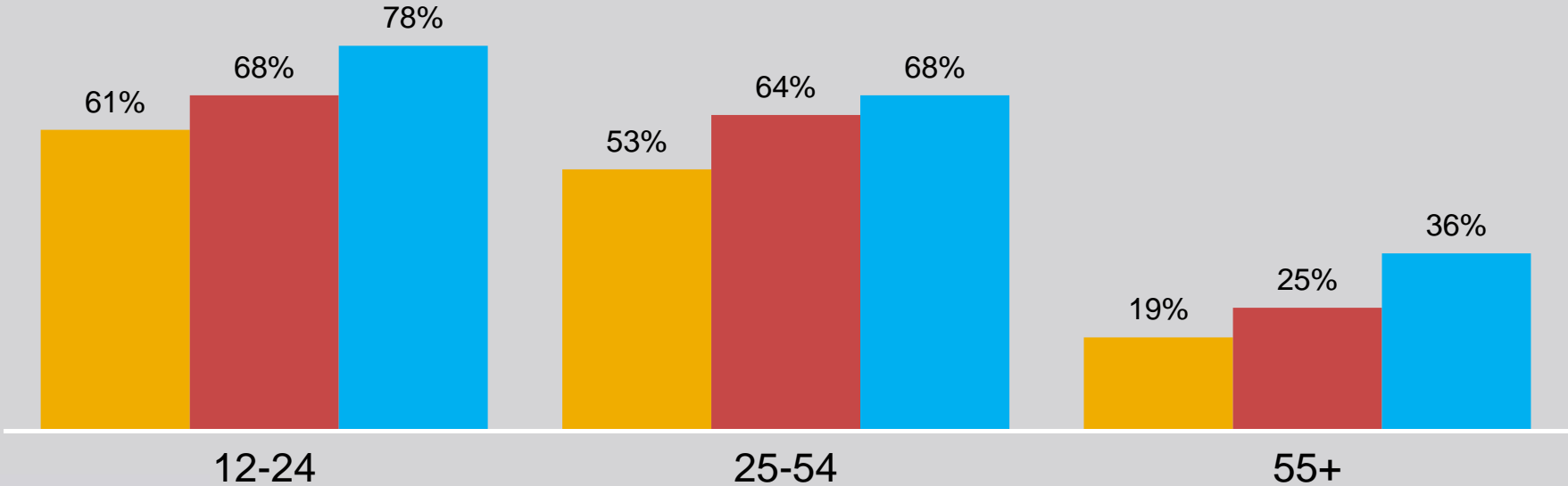
Base: Total Population 12+



Smartphone Penetration Approaching Three-Quarters of Those Under 55

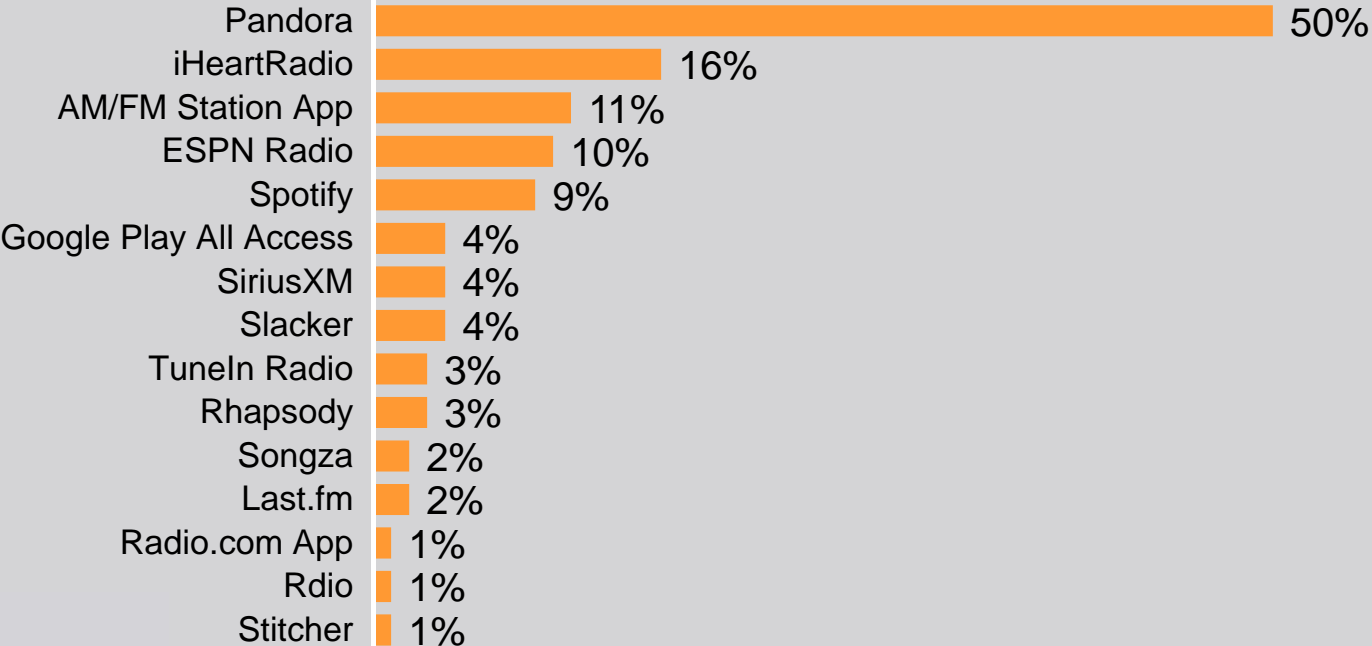
% by Age Group Who Own a Smartphone

2012 2013 2014



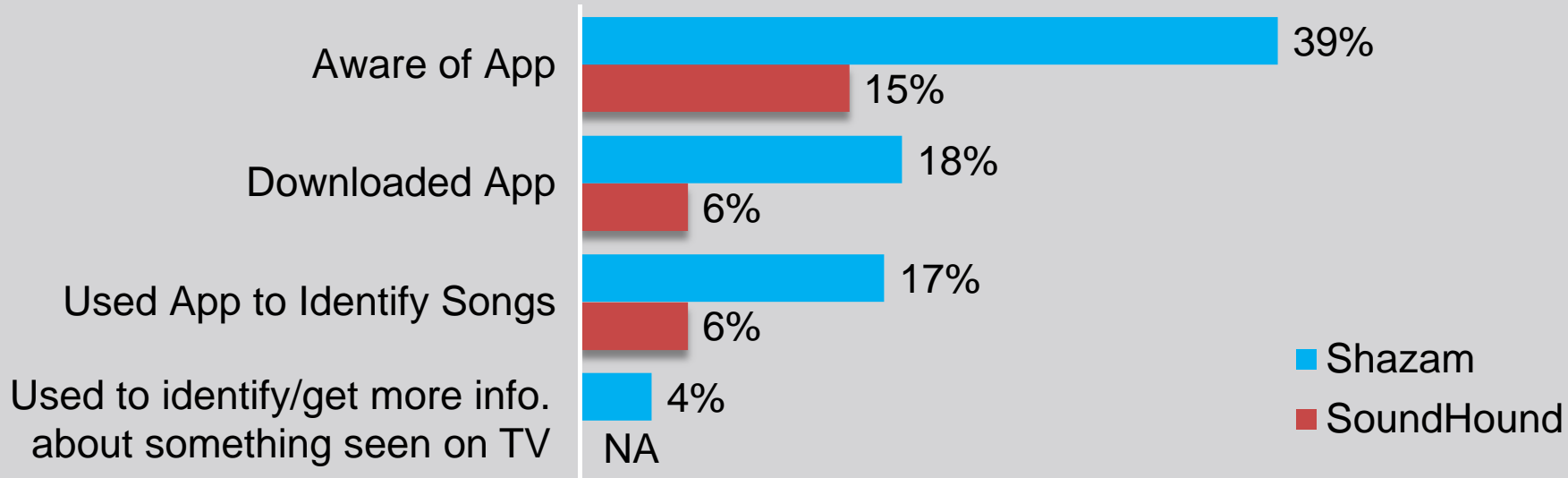
Pandora is by Far the Most Downloaded Audio App

% of Smartphone Owners Who Report Having Downloaded Each App to Their Smartphone



Music Identification Apps “Shazam” and “SoundHound” Are on Many Smartphones

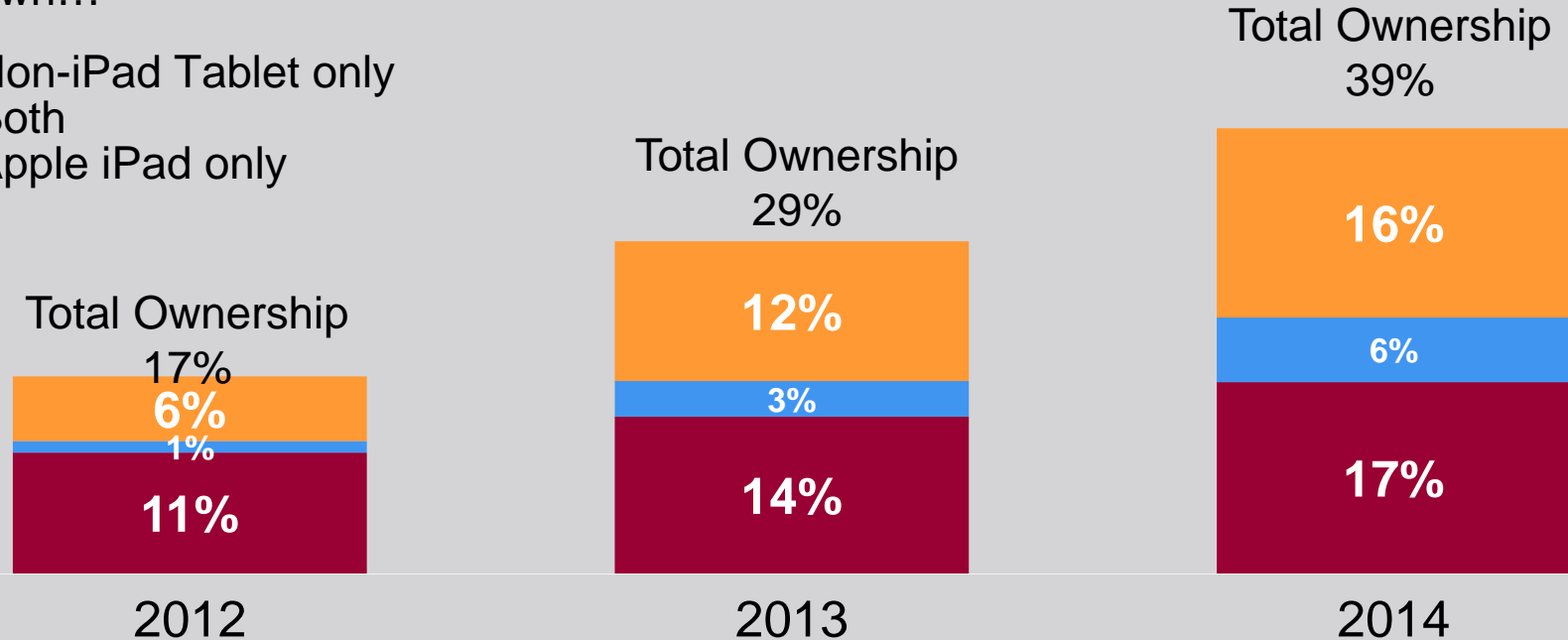
% of Smartphone Owners Who Are/Have...



Tablet Ownership Makes Another Huge Year-Over-Year Leap

% Who Own...

- Non-iPad Tablet only
- Both
- Apple iPad only



Base: Total Population 12+



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More Than Half Own a TV That is Connected to the Internet



Base: Total Population 12+



Podcasting

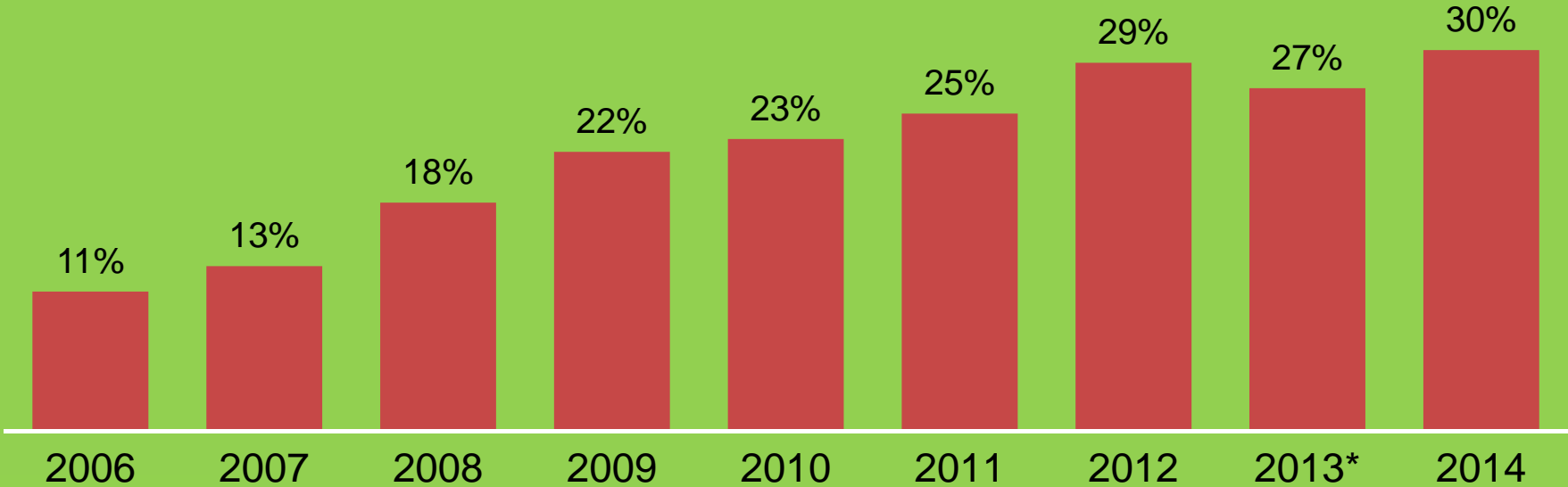


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Use of Audio Podcasting Reaches New High

% Who Have Ever Listened to an Audio Podcast



*Note: New Definition Starting in 2013

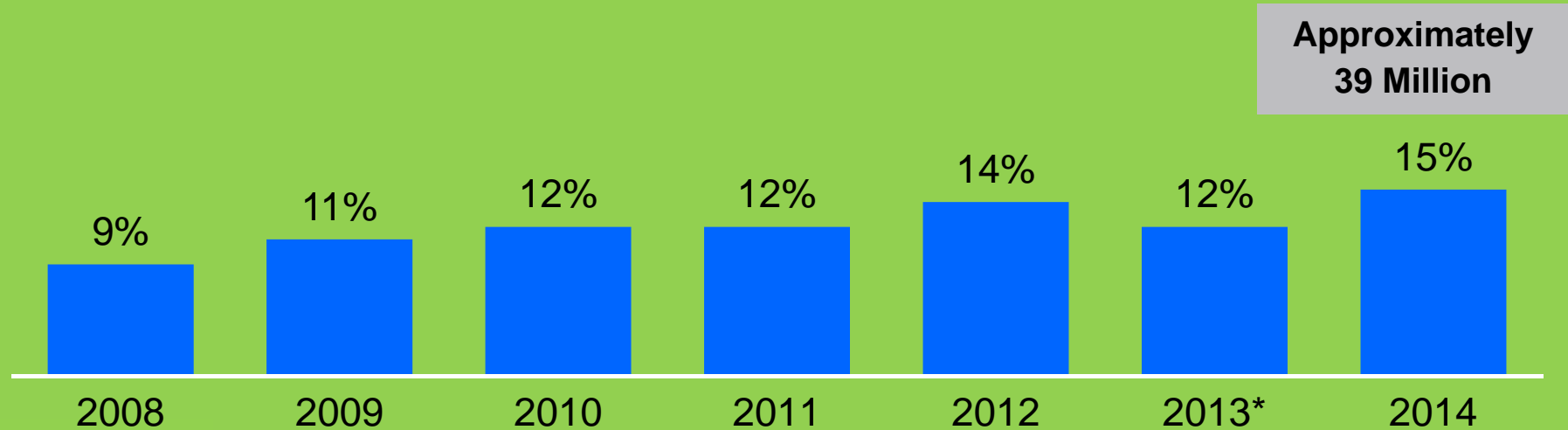
Base: Total Population 12+



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An Estimated 39 Million Americans Have Listened to a Podcast in the Past Month

% Who Have Listened to an Audio Podcast in Last Month



*Note: New Definition Starting in 2013

Base: Total Population 12+

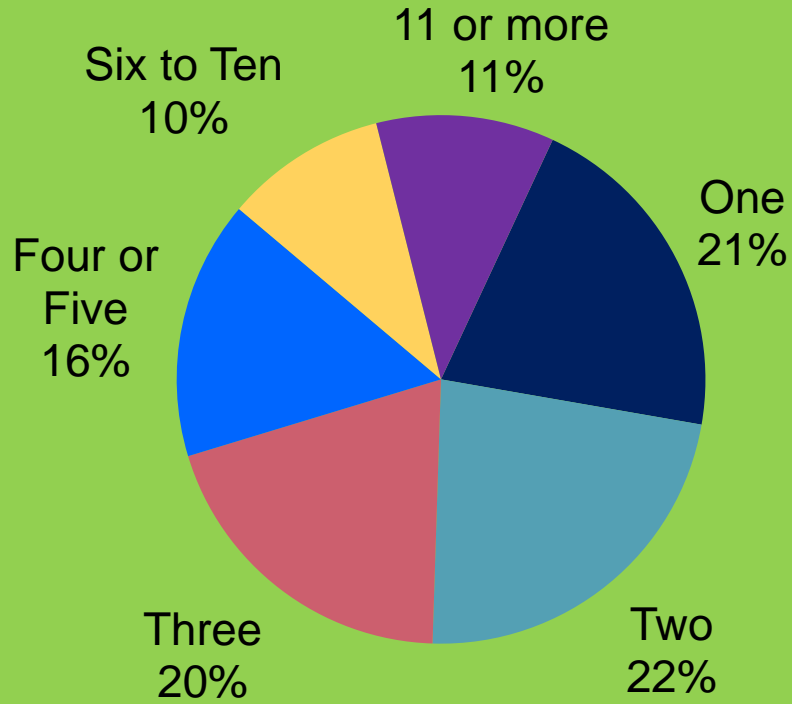


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One in Five Weekly Podcast Users Consume Six or More Podcasts a Week

Number of Podcasts Consumed in Last Week

**Average of
Six Podcasts
Consumed
per Week**

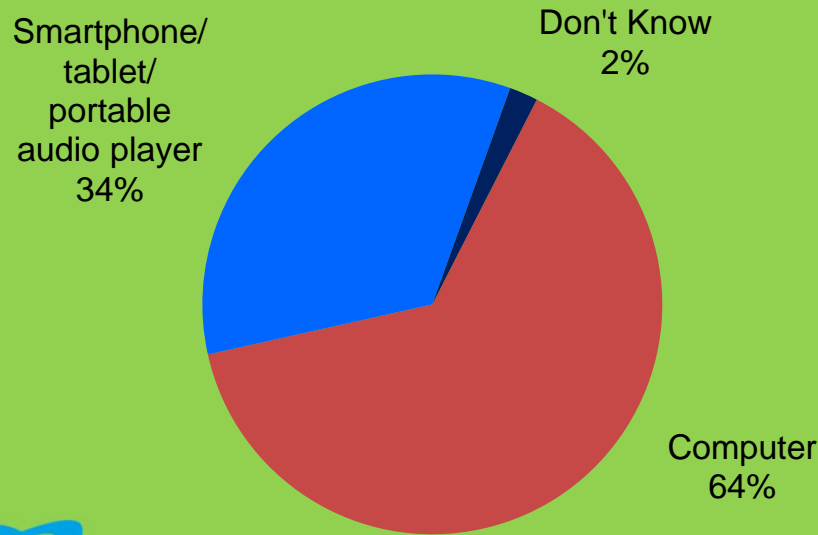


Base: Weekly Podcast Users

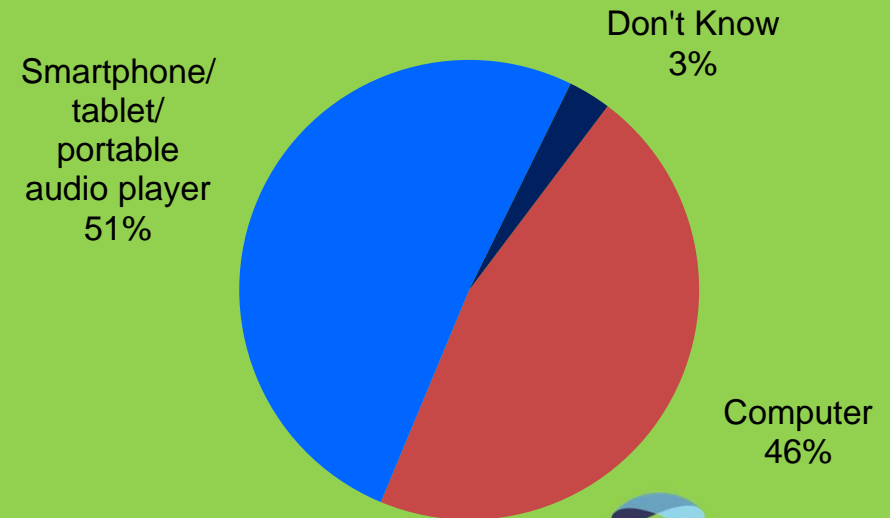
Major Shift in Podcast Listening Devices

% of Audio Podcast Listeners Who Listen Most Often on a...

2013



2014



Social Networking

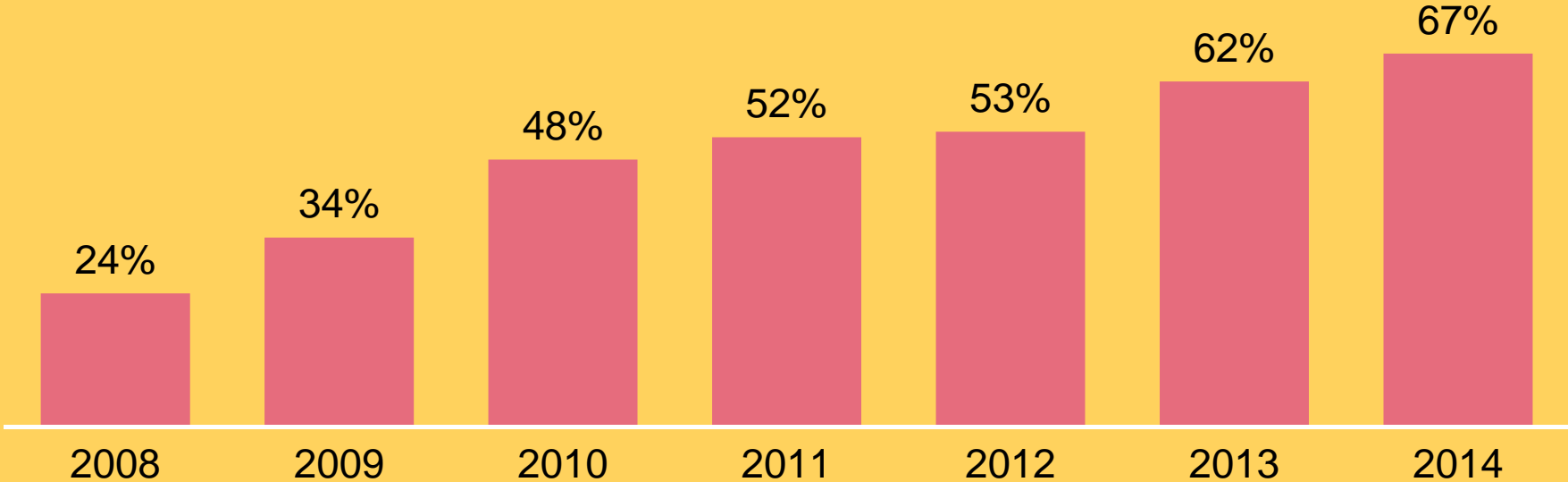


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Two-Thirds of Americans Have a Profile on a Social Networking Site

% Who Currently Have a Profile on Any Social Network



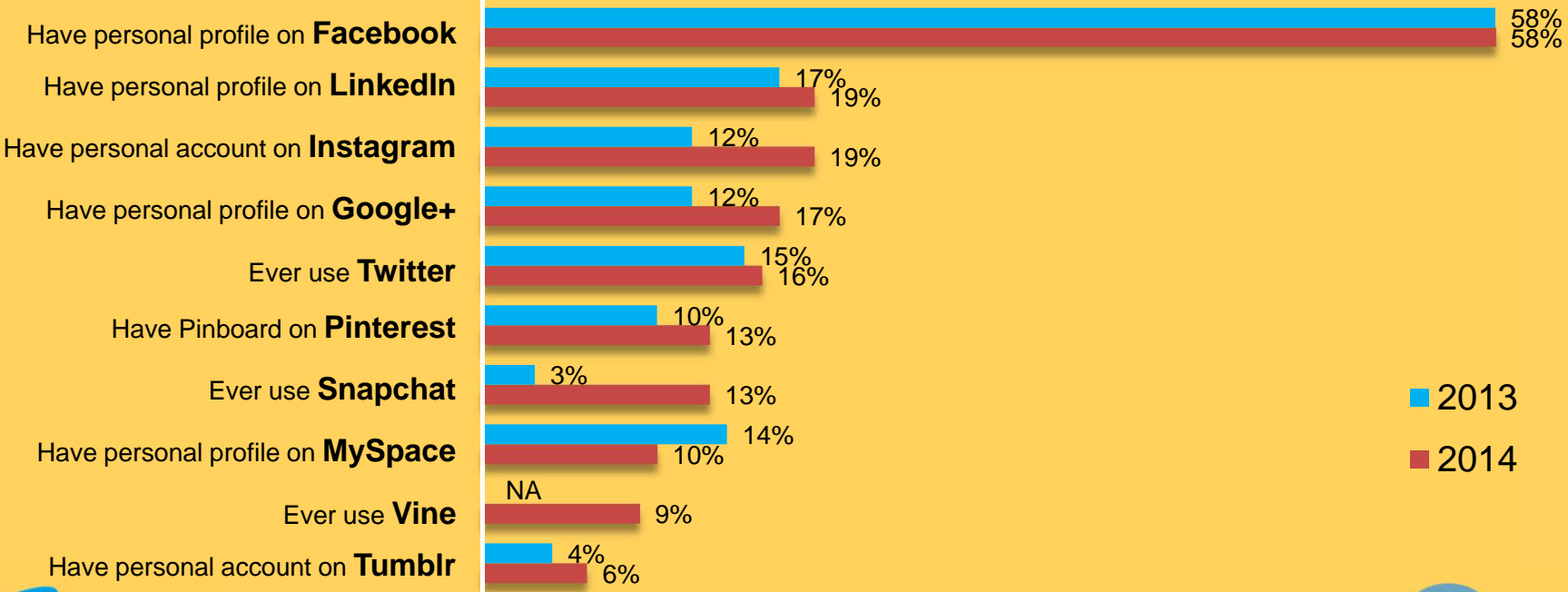
Base: Total Population 12+



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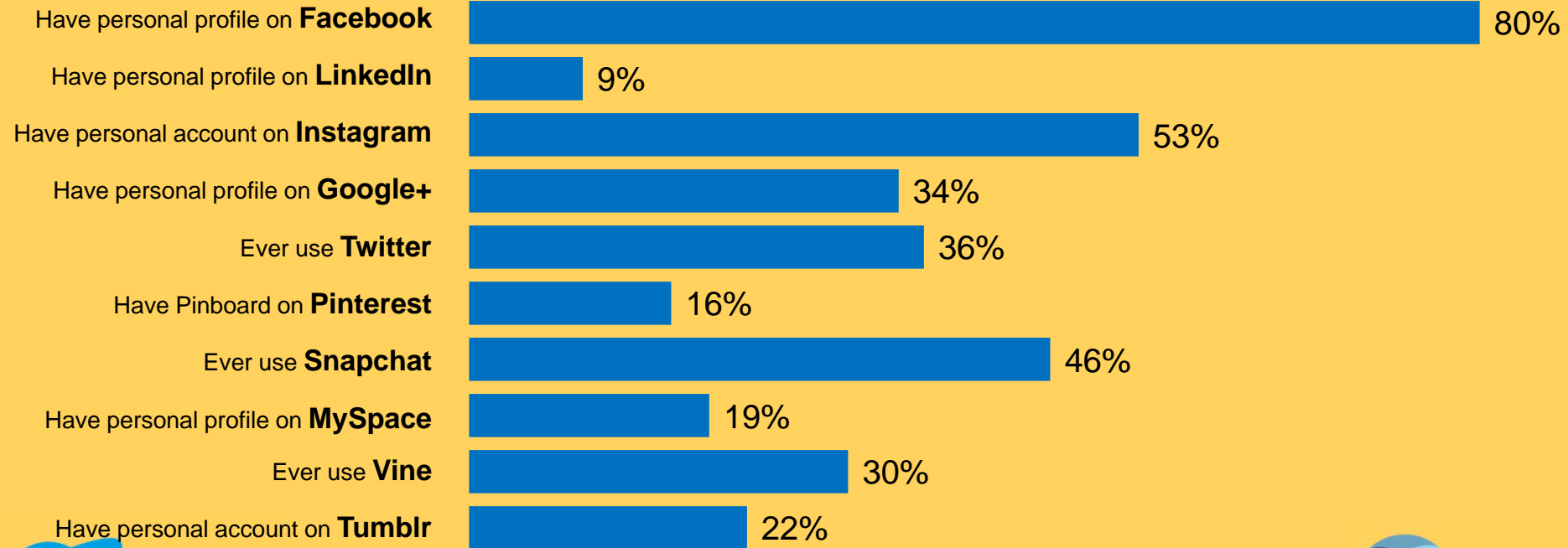
Facebook Competitors Continue to Grow

% Age 12+ Using Each Social Networking Site/Service



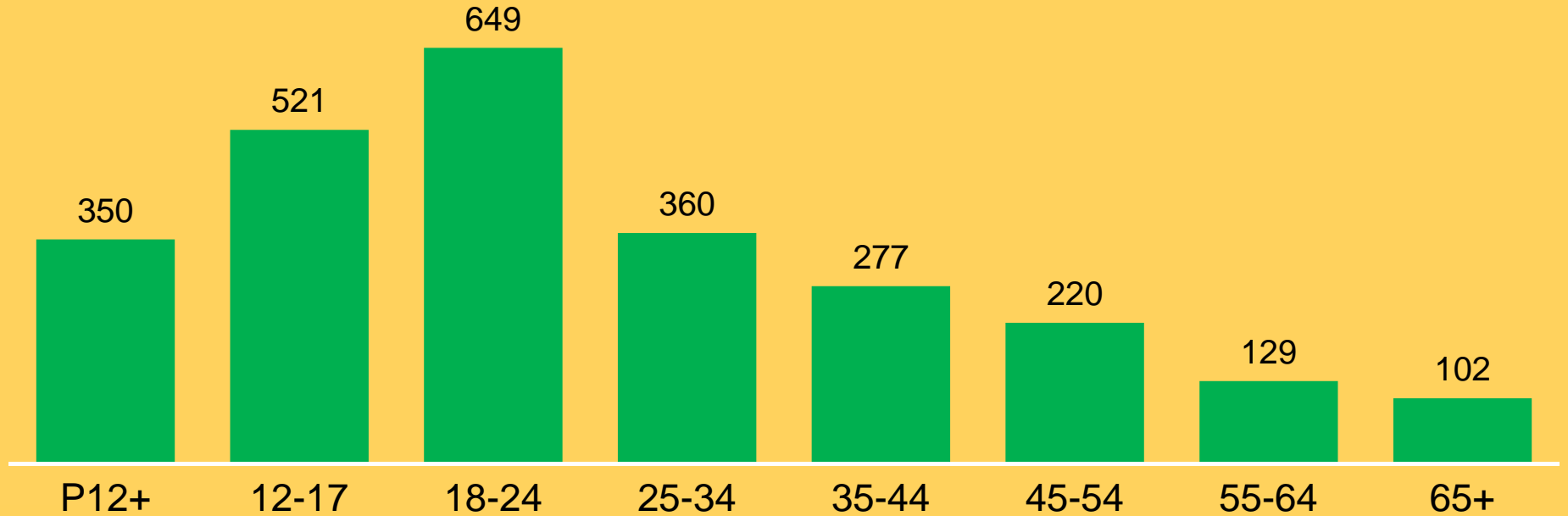
Mobile Image-Sharing Apps Popular with 12-24s

% Age 12-24 Using Each Social Networking Site/Service



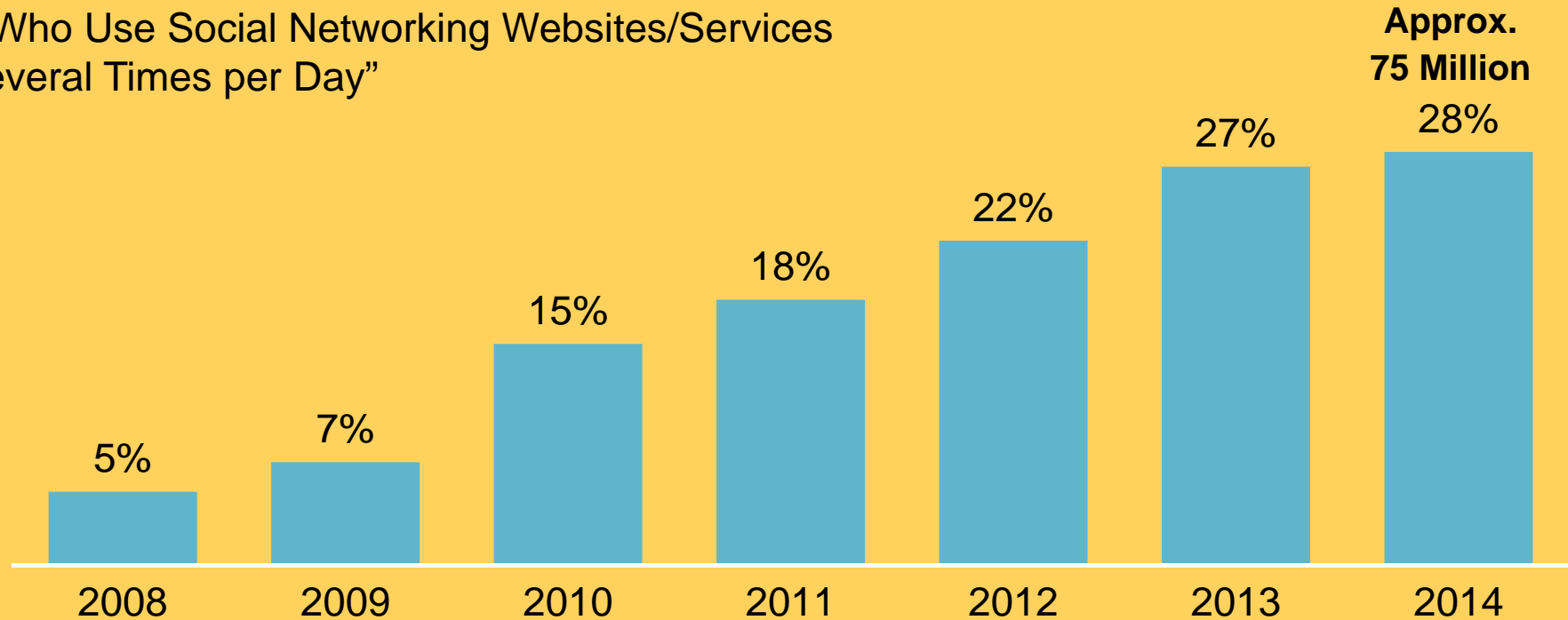
Young Facebook Users Have Lots of Friends

Average Number of Facebook Friends by Age Group



An Estimated 75 Million Americans Check Their Social Network Several Times per Day

% Who Use Social Networking Websites/Services
“Several Times per Day”



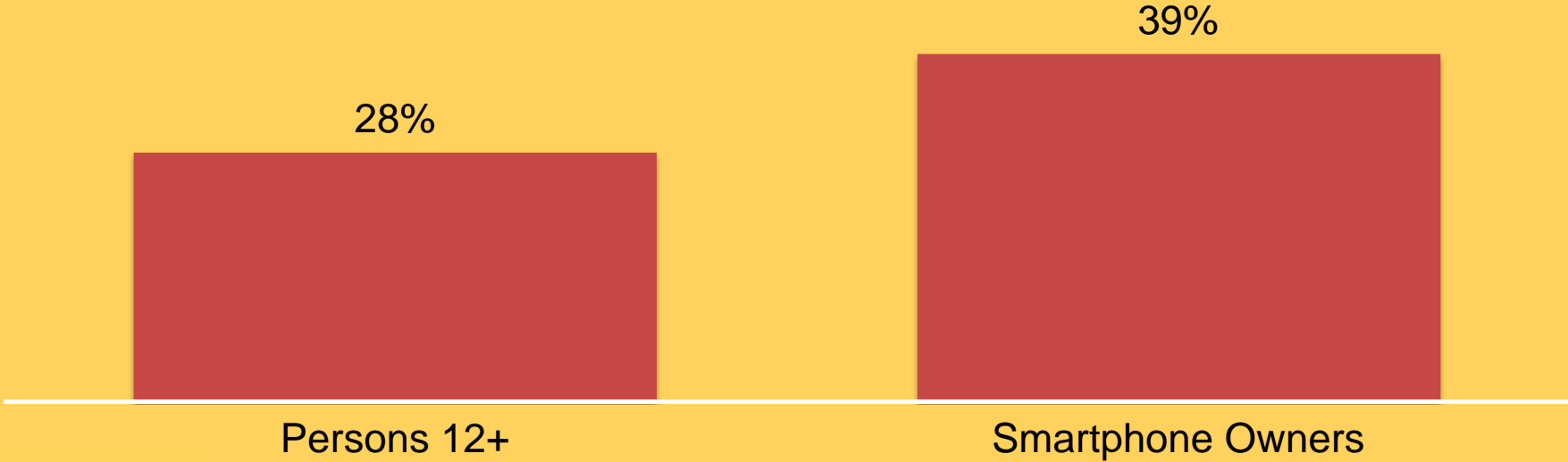
Base: Total Population 12+



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Four in Ten Smartphone Owners Are Habitual Social Network Users

% Who Use Social Networking Websites/Services
“Several Times per Day”



Music Discovery

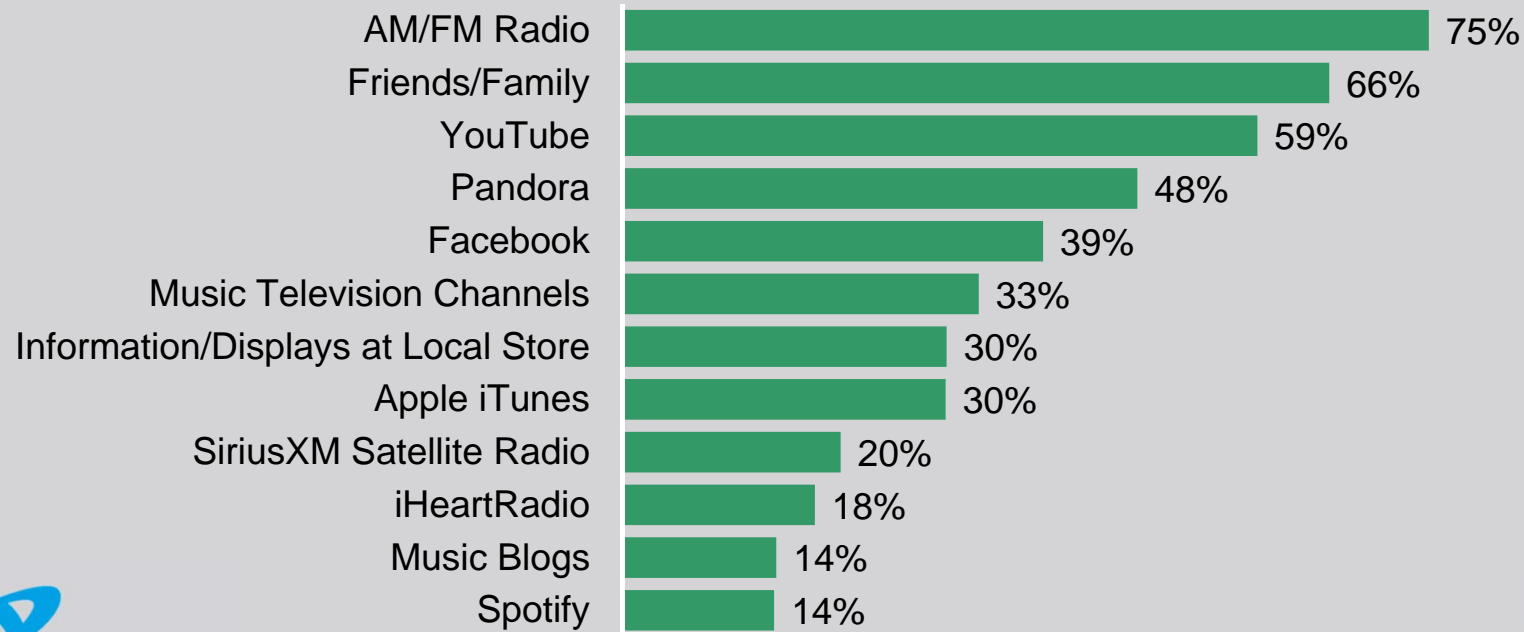


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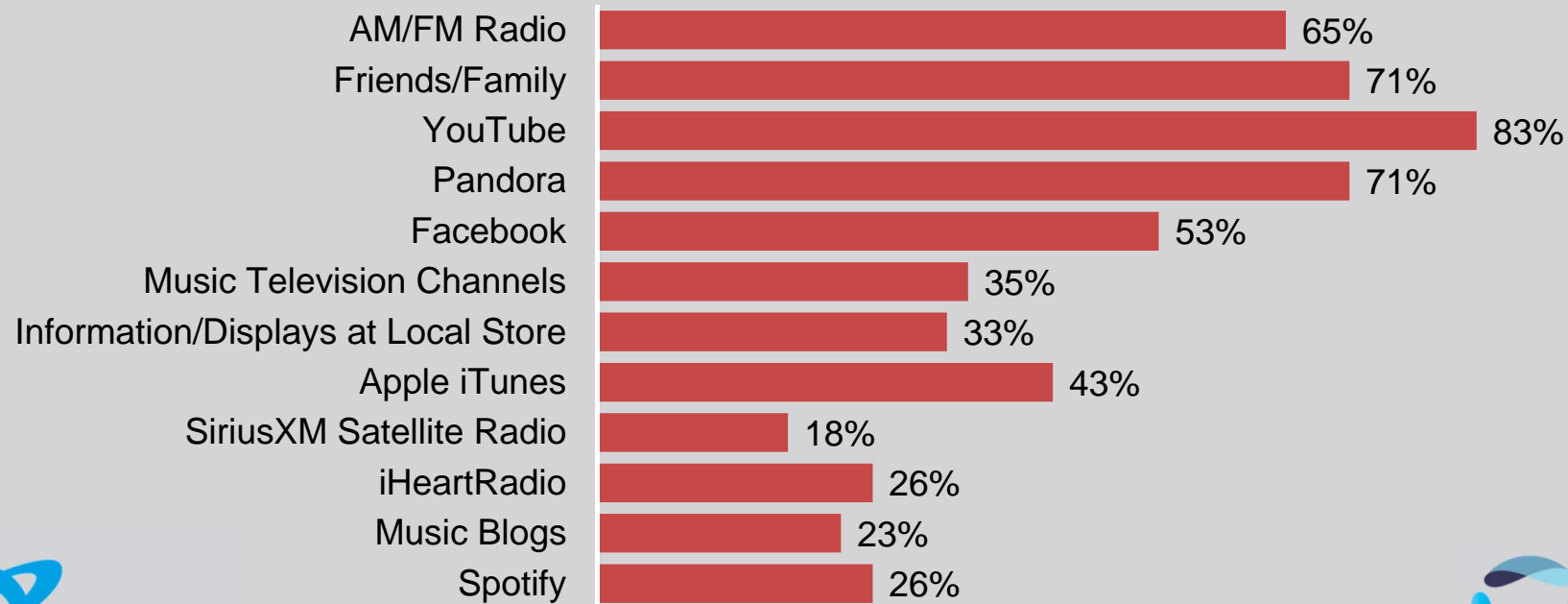
AM/FM Radio is the Top Source Overall For Keeping Up-To-Date with Music

% Who Ever Use Each Source to Keep Up-to-Date With Music



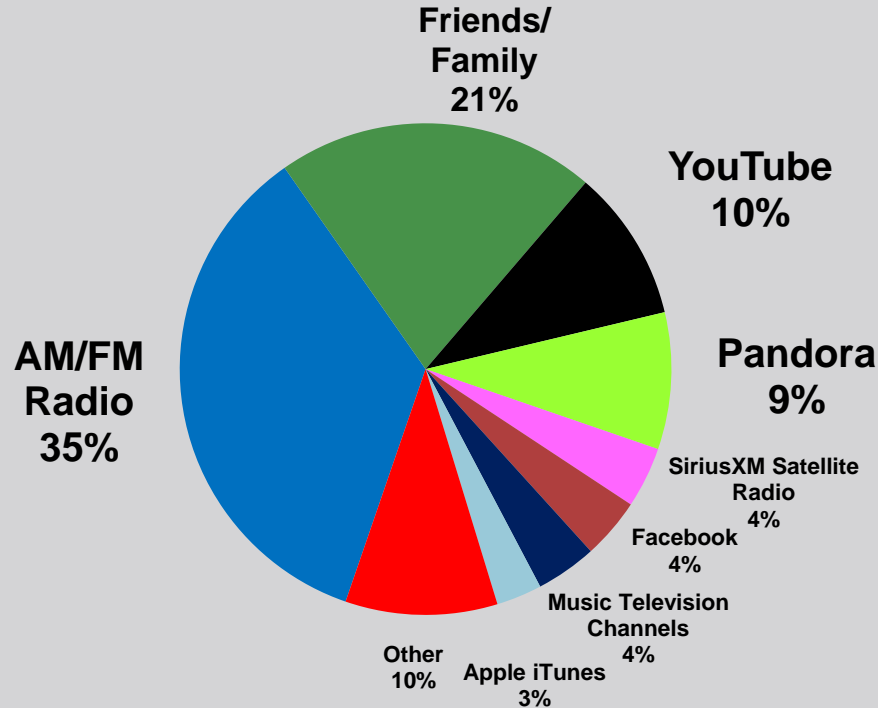
YouTube is the Top Source Among 12-24s For Keeping Up-To-Date with Music

% of 12-24s Who Ever Use Each Source to Keep Up-to-Date With Music



AM/FM Radio is the Most-Used Source For Keeping Up-To-Date with Music

% Who Use Each Source Most to Keep Up-to-Date With Music



Base: Those saying it is "Very Important" or "Somewhat Important" to Keep Up-To-Date With Music

Observations



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Observations

- Mobile devices are rewiring behavior extremely quickly
- The Internet Audio pie continues to grow -- the leading services are growing, but so far no evidence it's at one another's expense
- Competition flourishing across platforms and contexts
- Clear generational differences in media habits

Observations

- The debut of iTunes Radio has brought new audience to the medium
- Google is a significant player in Internet Audio -- Google Play All Access is growing, and YouTube is tops for music discovery among 12-24s
- Even with new entrants, Pandora continues to flourish
- AM/FM Radio streams are an important part of Online Radio usage

Observations

- While Facebook and Twitter growth are slowing, mobile image sharing is hot
- Instagram and Snapchat heavily used by 12-24s

Observations

- AM/FM Radio is the leading source to keep up-to-date with music
- Podcasts are getting hotter -- the percentage of monthly listeners grew strongly year-over-year
- The connected car is already here, with more than one-quarter of cell phone owners plugging their phones into their cars

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