The Infinite Dial 2013
Navigating Digital Platforms
Methodology Overview

» In January/February 2013, Arbitron and Edison Research conducted a national telephone survey offered in both English and Spanish language (landline and cell phone) of 2,021 people aged 12 and older.

» Data were weighted to national 12+ population figures.

» This is the 21st study in our series dating to 1998.

» These studies provide estimates of emerging digital platforms and their impact on the media landscape based on self-reported consumer behaviors and attitudes.
Headlines: Navigating Digital Platforms

» Mobile device growth continues: more than half now own a smartphone; tablet ownership is up significantly in past year.

» Habitual use of social media reaches an estimated 71 million Americans.

» Online Radio continues its growth trajectory reaching new highs for weekly usage and time spent listening in the past four years.¹

» During the same span of time, AM/FM Radio has grown to 243 million weekly listeners and time spent listening has remained approximately two hours a day.²

» AM/FM Radio “Rules the Road” with far more frequent users than all other in-car audio options.

» AM/FM Radio delivers far more consumers than other media during the half hour before they arrive to shop.

¹ Online Radio = Listening to AM/FM radio stations online and/or listening to audio content available only on the Internet
² Source: Arbitron Inc., RADAR
Digital and Media Landscape
### Media/Digital Platforms 2003 vs. 2013

#### Millions of Users

<table>
<thead>
<tr>
<th>Platform</th>
<th>2003</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV</td>
<td>230</td>
<td>256</td>
</tr>
<tr>
<td>Radio</td>
<td>223</td>
<td>243</td>
</tr>
<tr>
<td>Internet</td>
<td>178</td>
<td>232</td>
</tr>
<tr>
<td>Home Broadband</td>
<td>33</td>
<td></td>
</tr>
<tr>
<td>Home Wi-Fi</td>
<td>182</td>
<td>177</td>
</tr>
<tr>
<td>Smartphone</td>
<td>177</td>
<td>139</td>
</tr>
</tbody>
</table>

Source: Infinite Dial 2013, TVB- “TV Basics,” Arbitron Inc., and RADAR Base P12+
Combined Time Spent per Day With Radio, TV, and Internet Gained More Than an Hour Since 2003

Self-Reported Average Time Spent per Day With Today’s Three Biggest Media: Radio, TV, Internet (Hours:Minutes)

- 2003: 7:03
- 2013: 8:15

Base: Total Population 12+
Internet Access and Digital Household Trends
Those With Three or More Computers at Home Remains Stable at One in Four

% of People in Homes With Three or More Working Computers

Base: Total Population 12+

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>18%</td>
</tr>
<tr>
<td>2010</td>
<td>23%</td>
</tr>
<tr>
<td>2011</td>
<td>25%</td>
</tr>
<tr>
<td>2012</td>
<td>24%</td>
</tr>
<tr>
<td>2013</td>
<td>24%</td>
</tr>
</tbody>
</table>
In Home Wi-Fi Usage Reaches Two in Three People

% of People in Homes With Internet Access and a Wi-Fi Network Setup

Base: Total Population 12+
One in Four Live in Homes With Five or More Devices Connected to Wi-Fi

% With Five or More Devices Connected to Wi-Fi Network Setup in Home

2011: 9%
2012: 17%
2013: 24%

Base: Total Population 12+

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Online Radio
Monthly Online Radio Audience Reaches Approximately 120 Million Americans

% Who Have Listened to Online Radio in Last Month

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

Base: Total Population 12+
Weekly Online Radio Audience Reaches One in Three

% Who Have Listened to Online Radio in Last Week

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

Base: Total Population 12+

Estimated 86 Million
Weekly Online Radio Listeners Report Listening For an Average of Nearly 12 Hours per Week

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

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

<table>
<thead>
<tr>
<th>Year</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time</td>
<td>6:13</td>
<td>6:31</td>
<td>8:02</td>
<td>9:17</td>
<td>9:46</td>
<td>11:56</td>
</tr>
</tbody>
</table>

Base: Weekly Online Radio Listeners
Vast Majority of Weekly Online Radio Listeners Also Listen to Over-the-Air Radio

% of Weekly Online Radio Listeners Who…

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

- Listened Exclusively to Online Radio (Did NOT Listen to Over-the-Air AM/FM Radio) 18%
- Listened to Over-the-Air AM/FM Radio in the Last Week 82%
- 6% of All Persons 12+ Listened Exclusively to Online Radio in the Past Week

Base: Weekly Online Radio Listeners
Year-Over-Year Growth Continues for Pandora

% Listened to Pandora…

Last Month

2012: 22%
2013: 27%

Last Week

2012: 16%
2013: 20%

Base: Total Population 12+
More Familiar With Pandora but iHeartRadio Is Gaining Ground in Awareness

<table>
<thead>
<tr>
<th>% Aware of...</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pandora</td>
<td>69%</td>
<td>59%</td>
</tr>
<tr>
<td>Estimated 182 Mil.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>iHeartRadio</td>
<td>45%</td>
<td>31%</td>
</tr>
<tr>
<td>Estimated 119 Mil.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spotify</td>
<td>22%</td>
<td>NA</td>
</tr>
<tr>
<td>Estimated 57 Mil.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Base: Total Population 12+
One in Five Have Used Their Cell Phone to Listen to Online Radio in a Car

% 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 Stereo

- **2010**: 6%
- **2011**: 11%
- **2012**: 17%
- **2013**: 21%

Base: Own a Cell Phone
One in Three At-Work Radio Listeners Listen on a Computer or Mobile Device

“Think about how you listen to the radio while at work. Do you most often listen to…?”

- Radio Stations on Your Computer Over Internet 19%
- Radio Stations on a Regular Radio 62%
- On a Mobile Device Such as a Smartphone 14%
- Don't Know 5%

Base: Persons 18+ Employed Full-Time or Part-Time and Listen to the Radio While Working (22% of Total 18+ Population)
Familiarity With the Term “Podcasting” Remains at Nearly Half

% Aware of the Term “Podcasting”

<table>
<thead>
<tr>
<th>Year</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>22%</td>
<td>37%</td>
<td>37%</td>
<td>43%</td>
<td>45%</td>
<td>45%</td>
<td>46%</td>
<td>46%</td>
</tr>
</tbody>
</table>

Base: Total Population 12+
Understanding Podcasting

New Description of Podcasting in 2013

One definition of Podcasting is downloading various types of online audio and video programs or shows, in the form of digital files you can listen to or view at any time you choose. Some examples of Podcasting might include a talk show or a hosted music program. Podcasting does NOT refer to the downloading of individual MP3s or songs or movies.
Use of Podcasting Has Leveled Off

% Who Have Ever Listened to an Audio Podcast
% Who Have Ever Watched a Video Podcast

*Note: New Definition in 2013
An Estimated 32 Million Americans Have Listened to a Podcast in the Past Month

% Who Have Listened to an Audio Podcast in the Past Month

- 2008: 9%
- 2009: 11%
- 2010: 12%
- 2011: 12%
- 2012: 14%
- 2013: 12%

Approximately 32 Million

Base: Total Population 12+
More Than a Quarter of Weekly Podcast Users Consume Six or More Podcasts a Week

Number of Podcasts Consumed in the Past Week

- One: 19%
- Two: 22%
- Three: 16%
- Four or Five: 15%
- Six to Ten: 15%
- 11 or more: 13%

Average of Six Podcasts Consumed per Week

Base: Weekly Podcast Users
More Than Four in Ten Have Viewed Online Video in the Last Week

% Who Have Watched Online Video…

Approximately 113 Million

Base: Total Population 12+
YouTube Growth Leveling Off

% Who Have Watched Internet Video Programming From YouTube...

Last Month

<table>
<thead>
<tr>
<th>Year</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Watched</td>
<td>12%</td>
<td>21%</td>
<td>34%</td>
<td>38%</td>
<td>41%</td>
<td>45%</td>
</tr>
</tbody>
</table>

Last Week

<table>
<thead>
<tr>
<th>Year</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Watched</td>
<td>12%</td>
<td>7%</td>
<td>14%</td>
<td>23%</td>
<td>28%</td>
<td>31%</td>
</tr>
</tbody>
</table>

Base: Total Population 12+
Average Time Spent per User With Online Radio Nearly Triple Time Spent With Online Video

Average Self-Reported Time Spent per Week per User (Hours:Minutes)

Weekly Online Radio Users  Weekly Online Video Users

2008  2009  2010  2011  2012  2013

6:13  6:31  8:02  9:17  9:46  11:56
2:20  2:20  2:53  3:26  4:20  4:00
More Than Half Now Own a Smartphone

% Who Own a Smartphone

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009*</td>
<td>10%</td>
</tr>
<tr>
<td>2010*</td>
<td>14%</td>
</tr>
<tr>
<td>2011*</td>
<td>31%</td>
</tr>
<tr>
<td>2012**</td>
<td>44%</td>
</tr>
<tr>
<td>2013**</td>
<td>53%</td>
</tr>
</tbody>
</table>

*2009-2011: “Is your cell phone a smartphone?”
**2012-2013: Own an Apple iPhone, Android smartphone, BlackBerry, or Windows smartphone

Base: Total Population 12+

Estimated 139 Million
Three-Quarters of 18-34s Own a Smartphone

% by Age Group Who Own a Smartphone

- 12-17: 54% (2012), 60% (2013)
- 25-34: 64% (2012), 74% (2013)
- 35-44: 54% (2012), 69% (2013)
- 45-54: 41% (2012), 51% (2013)
- 55-64: 27% (2012), 34% (2013)
- 65+: 11% (2012), 17% (2013)
Smartphone Owners Use a Wide Variety of Functions

% of Smartphone Owners Who Ever *(Activity)* On Their Smartphone

- **Make or Receive Calls**: 97%
- **Send or Receive Text Messages**: 94%
- **Take Pictures With Phone’s Camera**: 90%
- **Browse the Internet**: 83%
- **Use Social Networking Sites**: 63%
- **Play Games**: 57%
- **Watch Video**: 56%
- **Add Photos to Social Networking Sites**: 55%
- **Listen to Downloaded Music**: 54%
- **Listen to Online Radio**: 44%
- **Access Coupons From Retailers**: 25%
- **Scan a QR Code**: 21%
Three Functions Used Daily by the Majority of Smartphone Owners

% of Smartphone Owners Who (Activity) Daily or Less Than Once a Day

- **Make or Receive Calls**: 91% daily, 6% less than once a day
- **Send or Receive Text Messages**: 84% daily, 10% less than once a day
- **Take Pictures With Phone's Camera**: 39% daily, 51% less than once a day
- **Browse the Internet**: 61% daily, 22% less than once a day
- **Use Social Networking Sites**: 46% daily, 17% less than once a day
- **Play Games**: 31% daily, 26% less than once a day
- **Watch Video**: 20% daily, 35% less than once a day
- **Add Photos to Social Networking Sites**: 16% daily, 38% less than once a day
- **Listen to Downloaded Music**: 32% daily, 22% less than once a day
- **Listen to Online Radio**: 18% daily, 26% less than once a day
- **Access Coupons From Retailers**: 5% daily, 20% less than once a day
- **Scan a QR Code**: 2% daily, 19% less than once a day

- **Once a Day or More**
- **Less Than Once a Day**
Nearly Half of Smartphone Owners Have Downloaded the Pandora App

% of Smartphone Owners Who Have Downloaded Each App to Their Smartphone

- Pandora: 47%
- iHeartRadio: 15%
- AM/FM Station App: 9%
- Spotify: 6%
- Aha Radio: 5%
- Songza: 4%
- SiriusXM: 3%
- Radio.com App: 2%

56% of Smartphone Owners Have Downloaded Any of These Audio Apps
Texting is the Form of Communication 12-24s Use Most When Not in Person

“When not in person, which ONE of the following ways do you communicate with your friends and family MOST often?”

**Persons 12+**

- Talk on the Phone: 63%
- Text Message: 24%
- Email: 5%
- Facebook: 5%

**Persons 12-24**

- Talk on the Phone: 37%
- Text Message: 50%
- Email: 2%
- Facebook: 10%
More Than Half of Cell Phone Owners Always Have Their Phone Within Arm’s Length

“How often is your cell phone with you or nearby; that is, when is it within arm’s length?”

- Always: 52%
- Most of the Time: 30%
- Sometimes: 11%
- Rarely: 4%
- Almost Never: 3%

Base: Own a Cell Phone
“Which one of the following do you use most often to wake up in the morning?”

- **Cell Phone**: 30%
- **Some Other Way**: 33%
- **Dedicated Alarm Clock**: 22%
- **Clock Radio**: 15%

*Base: Total Population 12+*
Majority of 18-34s Use a Cell Phone to Wake Up in the Morning

"Which one of the following do you use most often to wake up in the morning?"

**Persons 12+**
- Dedicated Alarm Clock: 22%
- Clock Radio: 15%
- Cell Phone: 30%
- Some Other Way: 33%

**Persons 18-34**
- Dedicated Alarm Clock: 19%
- Clock Radio: 6%
- Cell Phone: 59%
- Some Other Way: 16%
Two-Thirds Who Awaken With a Clock Radio, Alarm, or Cell Phone Do So to an Alarm Sound

“What do you hear most often when you wake up in the morning?”

Alarm Sound: 66%
Radio: 19%
Own Music: 14%
Don’t Know: 1%

Base: Wake Up With Alarm Clock, Clock Radio or Cell Phone
Tablet Ownership Reaches Three in Ten; Up More Than 70% Year Over Year

% Who Own...

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-iPad Tablet only</td>
<td>6%</td>
<td>12%</td>
</tr>
<tr>
<td>Both</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>Apple iPad only</td>
<td>11%</td>
<td>14%</td>
</tr>
<tr>
<td>Total Ownership</td>
<td>17%</td>
<td>29%</td>
</tr>
</tbody>
</table>

Total Ownership

Base: Total Population 12+
Social Networking
Six in Ten Americans Have a Profile on a Social Networking Site

% Who Currently Have a Profile on Any Social Network

Base: Total Population 12+

- 2008: 24%
- 2009: 34%
- 2010: 48%
- 2011: 52%
- 2012: 56%
- 2013: 62%
Facebook Is the Dominant Player in Social Networking

% Using Each Social Networking Site/Service

- **Facebook** (Have personal profile) - 58%
- **LinkedIn** (Have personal profile) - 17%
- **Twitter** (Ever use) - 15%
- **MySpace** (Have personal profile) - 14%
- **Google+** (Have personal profile) - 12%
- **Instagram** (Have personal account) - 12%
- **Pinterest** (Have Pinboard) - 10%
- **Tumblr** (Have personal account) - 4%

**Base: Total Population 12+**
Year-Over-Year Growth in Social Networking Greatest Among People Age 55 and Older

% by Age Group Who Currently Have a Profile on Any Social Network

<table>
<thead>
<tr>
<th>Age Group</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>12-17</td>
<td>81%</td>
<td>83%</td>
</tr>
<tr>
<td>18-24</td>
<td>80%</td>
<td>86%</td>
</tr>
<tr>
<td>25-34</td>
<td>68%</td>
<td>80%</td>
</tr>
<tr>
<td>35-44</td>
<td>65%</td>
<td>73%</td>
</tr>
<tr>
<td>45-54</td>
<td>55%</td>
<td>58%</td>
</tr>
<tr>
<td>55-64</td>
<td>34%</td>
<td>43%</td>
</tr>
<tr>
<td>65+</td>
<td>23%</td>
<td>29%</td>
</tr>
</tbody>
</table>
An Estimated 71 Million Americans Check Their Social Network Several Times per Day

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

- 2008: Approx. 12 Million (5%)
- 2009: Approx. 18 Million (7%)
- 2010: Approx. 39 Million (15%)
- 2011: Approx. 46 Million (18%)
- 2012: Approx. 58 Million (22%)
- 2013: Approx. 71 Million (27%)

Base: Total Population 12+
Four in Ten Smartphone Owners Are Habitual Social Network Users

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

<table>
<thead>
<tr>
<th>Persons 12+</th>
<th>Smartphone Owners</th>
</tr>
</thead>
<tbody>
<tr>
<td>27%</td>
<td>39%</td>
</tr>
</tbody>
</table>
Young Facebook Users Have Lots of “Friends”

Average Number of Facebook Friends by Age Group

<table>
<thead>
<tr>
<th>Age Group</th>
<th>2012 Average Number of Friends: 262</th>
</tr>
</thead>
<tbody>
<tr>
<td>P12+</td>
<td>303</td>
</tr>
<tr>
<td>12-17</td>
<td>506</td>
</tr>
<tr>
<td>18-24</td>
<td>510</td>
</tr>
<tr>
<td>25-34</td>
<td>328</td>
</tr>
<tr>
<td>35-44</td>
<td>209</td>
</tr>
<tr>
<td>45-54</td>
<td>183</td>
</tr>
<tr>
<td>55-64</td>
<td>113</td>
</tr>
<tr>
<td>65+</td>
<td>115</td>
</tr>
</tbody>
</table>

Base: Have a Profile on Facebook
More Than Four in Ten Americans Hear or Read About Tweets Almost Every Day in the Media

“How often do you hear about Twitter feeds, commonly called ‘tweets,’ through media such as TV, radio, newspapers, or websites other than Twitter?”

- Almost Every Day: 44%
- Regularly, but Not Daily: 21%
- Sometimes: 12%
- Rarely: 7%
- Never: 7%
- Have Not Heard of Twitter: 9%

Base: Total Population 12+
Many Express Political Views on Facebook; Some Have Unfriended People Due to Political Views

“Do you ever express your political views on Facebook through posts or links to articles?”

- Yes: 29%
- No: 71%

“Have you ever unfriended anyone on Facebook because of his or her political views?”

- Yes: 13%
- No: 87%

Base: Have a Profile on Facebook
Four In Ten Notice a Lot More Company and Brand Content in News Feeds Compared With a Year Ago

“How much company, brand, or product-related content do you see in your Facebook news feed now compared to one year ago?”

- A Lot More Now: 41%
- A Little More Now: 21%
- About Same Amount: 20%
- A Lot Less Now: 3%
- A Little Less Now: 2%
- Don't Know: 13%

Base: Have a Profile on Facebook
In-Car Media
AM/FM Radio Is the King of In-Car Media

% Who Currently Ever Use in Primary Car

- AM/FM Radio: 84%
- CD Player: 63%
- iPod/MP3 Player: 29%
- Satellite Radio: 15%
- Online Radio: 12%
- HD Radio: 3%

Base: Driven/Ridden in Car in Last Month, age 18+; 87% of 18+ Population
AM/FM Radio Has Far More Frequent Users Than Other In-Car Audio Options

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

- AM/FM Radio: 58%
- CD Player: 15%
- iPod/MP3 Player: 11%
- Satellite Radio: 10%
- Online Radio: 4%
- HD Radio: 1%

Base: Driven/Ridden in Car in Last Month, age 18+
Nearly Three in Ten Have an In-Car Bluetooth Connection

% With a Bluetooth Connection in Primary Car

Have a Bluetooth Connection In-Car
28%

Do Not Have a Bluetooth Connection In-Car
72%

Base: Driven/Ridden in Car in Last Month, age 18+
In-Dash Information and Entertainment Systems Still in Their Infancy

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

- Have In-Dash Information and Entertainment System: 6%
- Do Not Have In-Dash Information and Entertainment System: 94%

Base: Driven/Ridden in Car in Last Month, age 18+
New Music
Learning About and Keeping Up-to-Date with New Music Is More Important to 12-24s

% Saying It Is “Very Important” or “Somewhat Important” to Learn About and Keep Up-to-Date With New Music

<table>
<thead>
<tr>
<th>Base: Total Population 12+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Persons 12+</td>
</tr>
<tr>
<td>Persons 12-24</td>
</tr>
</tbody>
</table>
AM/FM Radio Is the Top Source For Those Seeking to Learn About New Music

% Who Ever Use Each Source to Learn About and Keep Up-to-Date With New Music

- AM/FM Radio: 78%
- Friends/Family: 73%
- YouTube: 55%
- Music Television Channels: 44%
- Facebook: 41%
- Pandora: 39%
- Apple iTunes: 37%
- Information/Displays at Local Store: 30%
- SiriusXM Satellite Radio: 16%
- Music Blogs: 15%
- iHeartRadio: 14%
- Spotify: 8%

Base: Those saying it is “Very Important” or “Somewhat Important” to Learn About and Keep Up-To-Date With New Music
More Than Seven in Ten 12-24s Learn About New Music From AM/FM Radio

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

<table>
<thead>
<tr>
<th>Source</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>AM/FM Radio</td>
<td>72%</td>
</tr>
<tr>
<td>Friends/Family</td>
<td>79%</td>
</tr>
<tr>
<td>YouTube</td>
<td>77%</td>
</tr>
<tr>
<td>Music Television Channels</td>
<td>53%</td>
</tr>
<tr>
<td>Facebook</td>
<td>57%</td>
</tr>
<tr>
<td>Pandora</td>
<td>58%</td>
</tr>
<tr>
<td>Apple iTunes</td>
<td>47%</td>
</tr>
<tr>
<td>Information/Displays at Local Store</td>
<td>29%</td>
</tr>
<tr>
<td>SiriusXM Satellite Radio</td>
<td>12%</td>
</tr>
<tr>
<td>Music Blogs</td>
<td>20%</td>
</tr>
<tr>
<td>iHeartRadio</td>
<td>22%</td>
</tr>
<tr>
<td>Spotify</td>
<td>13%</td>
</tr>
</tbody>
</table>

Base: Those saying it is “Very Important” or “Somewhat Important” to Learn About and Keep Up-To-Date With New Music
Heavy Users of Radio, TV, and Internet
Ages of Heavy Radio Users Closest to Population; Heavy Internet Users Skew Younger, Heavy TV Users Lean Older

Age Composition of...

Heavy Internet Users  
Median Age = 33

Heavy Radio Users  
Median Age = 42

Heavy TV Users  
Median Age = 50

Heavy Internet Users

- 12-17: 11%
- 18-24: 23%
- 25-34: 19%
- 35-44: 14%
- 45-54: 14%
- 55-64: 15%
- 65+: 18%

Heavy Radio Users

- 12-17: 10%
- 18-24: 14%
- 25-34: 17%
- 35-44: 15%
- 45-54: 18%
- 55-64: 12%
- 65+: 10%

Heavy TV Users

- 12-17: 7%
- 18-24: 18%
- 25-34: 12%
- 35-44: 13%
- 45-54: 18%
- 55-64: 17%
- 65+: 24%

NOTE: Median Age of Persons 12+ = 43
Heavy Usage of One Medium Is NOT Necessarily Associated With Less Time With Other Media

<table>
<thead>
<tr>
<th>Persons 12+</th>
<th>Heavy Radio Users 3+ hours/day</th>
<th>Heavy TV Users 5+ hours/day</th>
<th>Heavy Internet Users 4+ hours/day</th>
</tr>
</thead>
<tbody>
<tr>
<td>2:38</td>
<td>3:31</td>
<td>8:16</td>
<td>3:35</td>
</tr>
<tr>
<td>3:33</td>
<td>6:23</td>
<td>2:12</td>
<td></td>
</tr>
<tr>
<td>2:04</td>
<td>2:07</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
83% Would Be Very/Somewhat Disappointed if the Radio Station They Listen to Most Were Not On-Air

% Who Would Be “Very” or “Somewhat” Disappointed if the AM or FM Radio Station They Listen to Most Were No Longer On-Air

- Persons 12+: 83%
- Heavy TV Users: 84%
- Heavy Radio Users: 88%
- Heavy Internet Users: 85%

*Base: Those Naming a Station They Listen to Most*
Recency and Consumer Response
Radio is the top medium by far during the half hour before people arrive to shop.

% Who (Item) just before arriving at store of last shopping visit:

- Listened to AM/FM Radio: 49%
- Saw Advertising on a Billboard: 21%
- Watched TV: 12%
- Read/Looked at a Newspaper: 8%
- Used Internet on Desktop/Laptop for Price/Product Information: 6%
- Used Cell Phone to Look Up Price/Product Information: 6%
- Read/Looked at a Magazine: 3%

Base: Visited a Supermarket, Department Store, Retail Shop or Restaurant in Past 24 Hours
Radio Top Medium Before People Shop Even Among Heavy TV and Internet Users

% Who (Item) Just Before Arriving at Store of Last Shopping Visit

**Heavy TV Users**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listened to AM/FM Radio</td>
<td>51%</td>
</tr>
<tr>
<td>Watched TV</td>
<td>16%</td>
</tr>
<tr>
<td>Saw Advertising on a Billboard</td>
<td>14%</td>
</tr>
<tr>
<td>Read/Looked at a Newspaper</td>
<td>11%</td>
</tr>
<tr>
<td>Used Internet on Desktop/Laptop for Price/Product Information</td>
<td>5%</td>
</tr>
<tr>
<td>Used Cell Phone to Look Up Price/Product Information</td>
<td>3%</td>
</tr>
<tr>
<td>Read/Looked at a Magazine</td>
<td>2%</td>
</tr>
</tbody>
</table>

**Heavy Internet Users**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listened to AM/FM Radio</td>
<td>45%</td>
</tr>
<tr>
<td>Saw Advertising on a Billboard</td>
<td>21%</td>
</tr>
<tr>
<td>Watched TV</td>
<td>14%</td>
</tr>
<tr>
<td>Used Internet on Desktop/Laptop for Price/Product Information</td>
<td>11%</td>
</tr>
<tr>
<td>Used Cell Phone to Look Up Price/Product Information</td>
<td>10%</td>
</tr>
<tr>
<td>Read/Looked at a Newspaper</td>
<td>8%</td>
</tr>
<tr>
<td>Read/Looked at a Magazine</td>
<td>4%</td>
</tr>
</tbody>
</table>

*Base: Visited a Supermarket, Department Store, Retail Shop or Restaurant in Past 24 Hours*
Ads on AM/FM Radio Prompt Consumer Response

% Who Have Ever Done the Following After Hearing an Ad on AM/FM Radio

- Visited Advertised Restaurant: 43%
- Visited Advertised Store: 41%
- Attended Advertised Event or Performance: 40%
- Talked About the Ad or Product With Others: 39%
- Watched Advertised TV Program: 38%
- Recommended Advertised Product to Others: 28%
- Visited Advertiser’s Website: 28%
- Called the Advertised Product or Store: 16%

Base: Total Population 12+
Consumer-Controlled Television Viewing
Almost Half Now Have a DVR; 60% Growth in Five Years

% Who Have a Digital Video Recorder

2008: 28%
2013: 45%

Base: Total Population 12+
Persons 12-34 Much More Likely to Watch TV by Streaming or Downloading Shows

% Who Have Watched TV in the Last Month by Streaming or Downloading Shows to be Viewed on a…

- **Television**
  - Persons 12+: 21%
  - Persons 12-34: 28%

- **Desktop/Laptop**
  - Persons 12+: 19%
  - Persons 12-34: 30%

- **Tablet**
  - Persons 12+: 8%
  - Persons 12-34: 12%

- **Cell Phone**
  - Persons 12+: 7%
  - Persons 12-34: 12%
Observations
Observation #1

Media consumption is not a zero sum game.

Digital platforms do not replace media usage... they enhance it.
Observation #2

Now that the majority of Americans have smartphones, they have a “two-way” radio in their pocket.

Find ways to engage an audience that is tuning-in and responding on the same device.
Observation #3

“Location, location, location.” Prime real estate is crucial on the smartphone.

A clear app strategy can help ensure your brand doesn’t get lost.
Observation #4

Facebook is on top of the social media world, but Twitter is getting hot.

Content providers, especially those focused on 12-24s, should engage Twitter users differently than Facebook.
Observation #5

Social networking sites like Instagram and Pinterest are becoming popular.

Increase your visual marketing efforts with social media.
Observation #6

Online Radio reaches 86 million a week for an average of nearly 12 hours.

With so many choices, it’s vital to have a strategy to cut through the clutter.
Observation #7

While the uptake of Podcasting has slowed, DVR usage has soared.

Radio may want to re-launch Podcasts to a wider audience and claim ownership of “time-shifted radio.”
Observation #8

Radio’s morning challenge and opportunity… the smartphone.

Encourage your P1s to wake up to your station on their smartphone.
Observation #9

AM/FM radio “rules the road” of in-car entertainment, but challengers want their slice.

Now is the time to define your in-car entertainment strategy.
Observation #10

Broadcast radio is strongest medium in the half hour before consumers arrive to shop.

This is the “moment of truth” when advertising can reinforce a buyer’s decision or help change his or her mind.