

The Infinite Dial 2014

A Look at Country P1s



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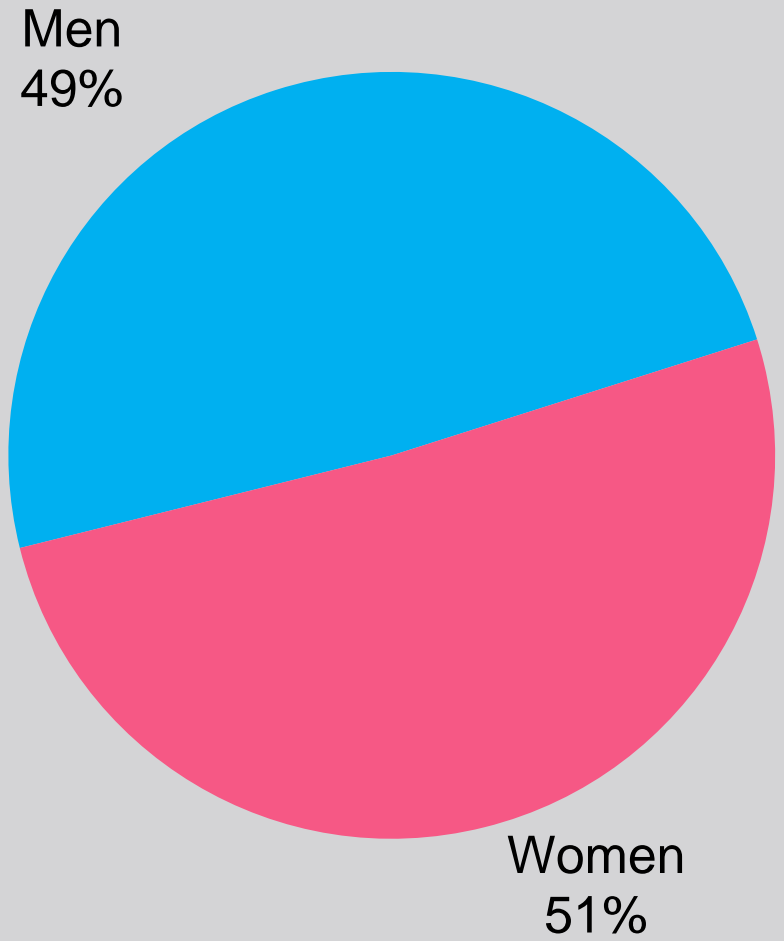
Methodology Overview

- 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.
- Respondents were asked, “Overall, what one radio station do you listen to most?”
- We then identified format for each station and assigned that respondent as P1 to a format group.
- This report is based on 146 Country format P1s.

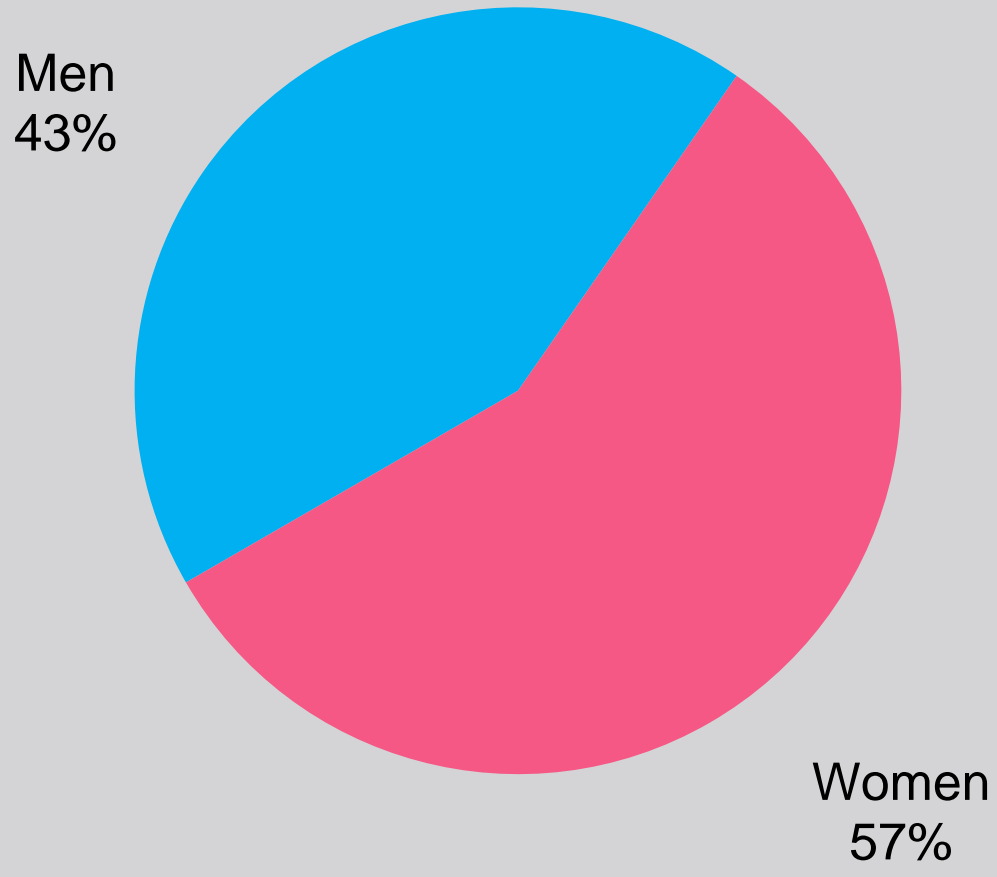


Who Are the Country P1s?

Persons 12+

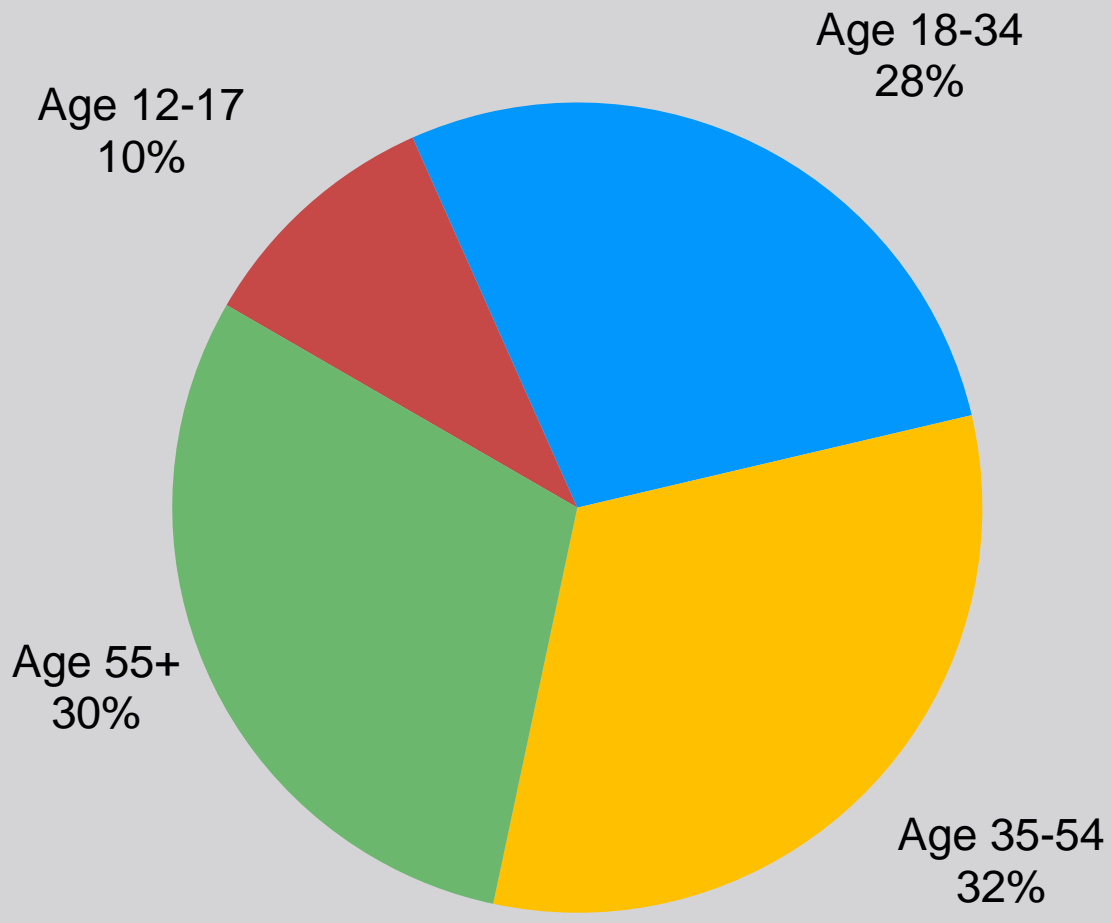


Country P1s



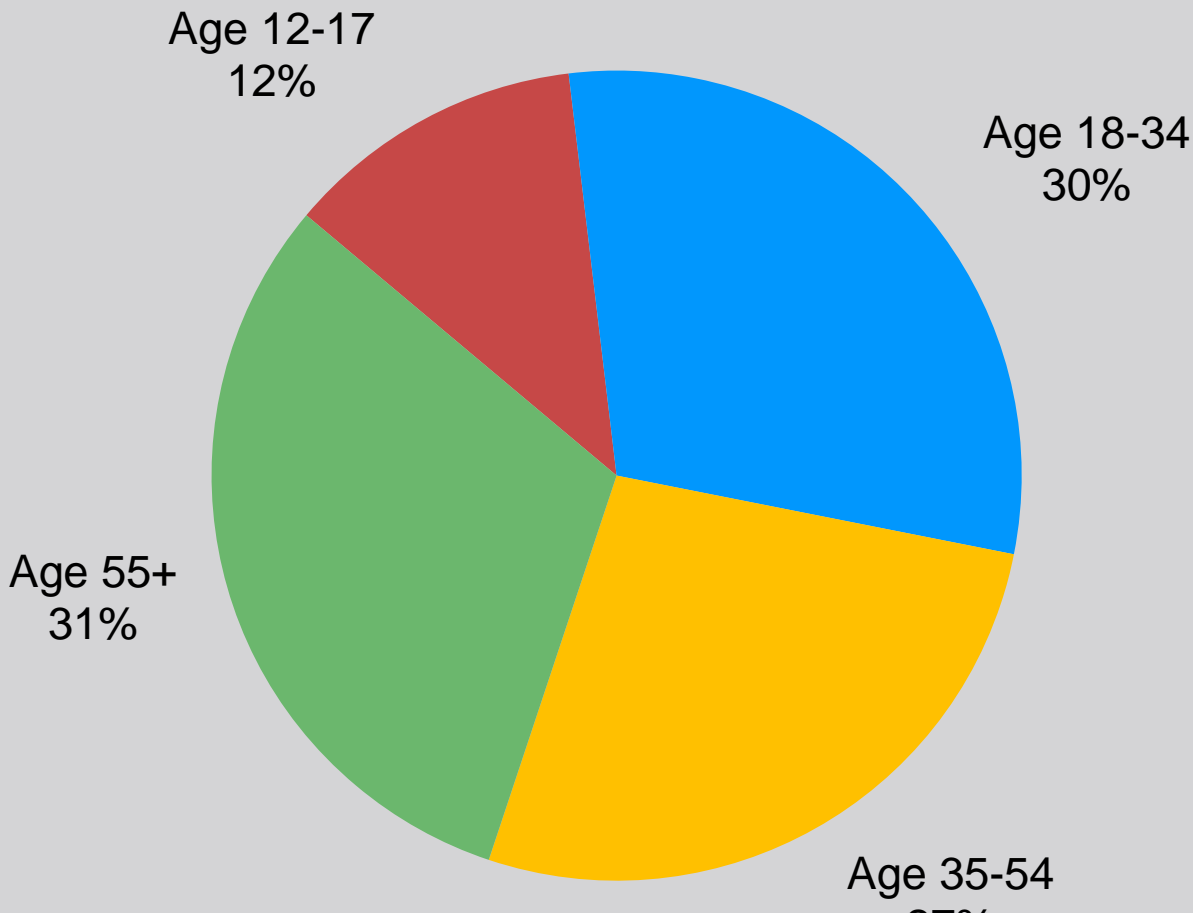
Who Are the Country P1s?

Persons 12+



Average age = 44

Country P1s

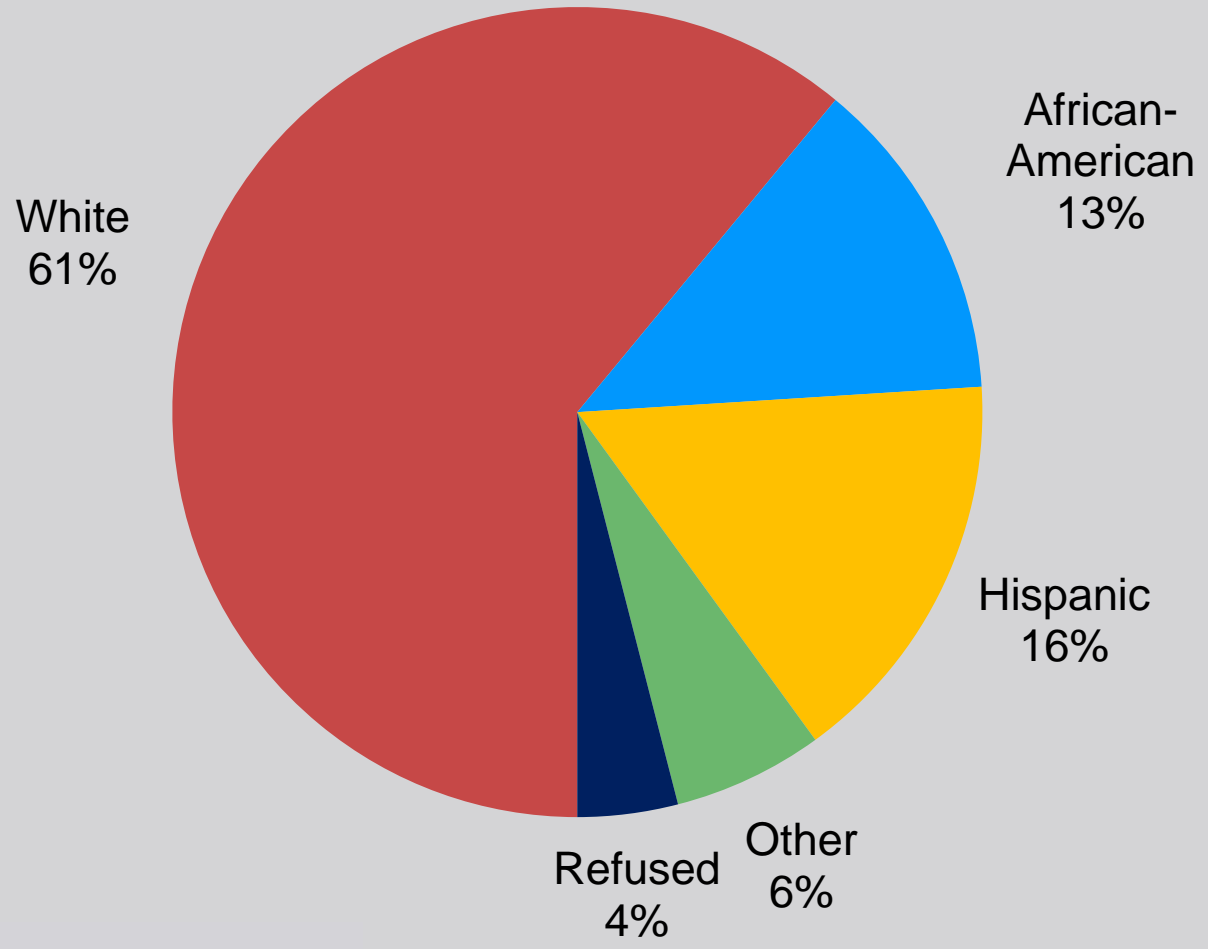


Average age = 43

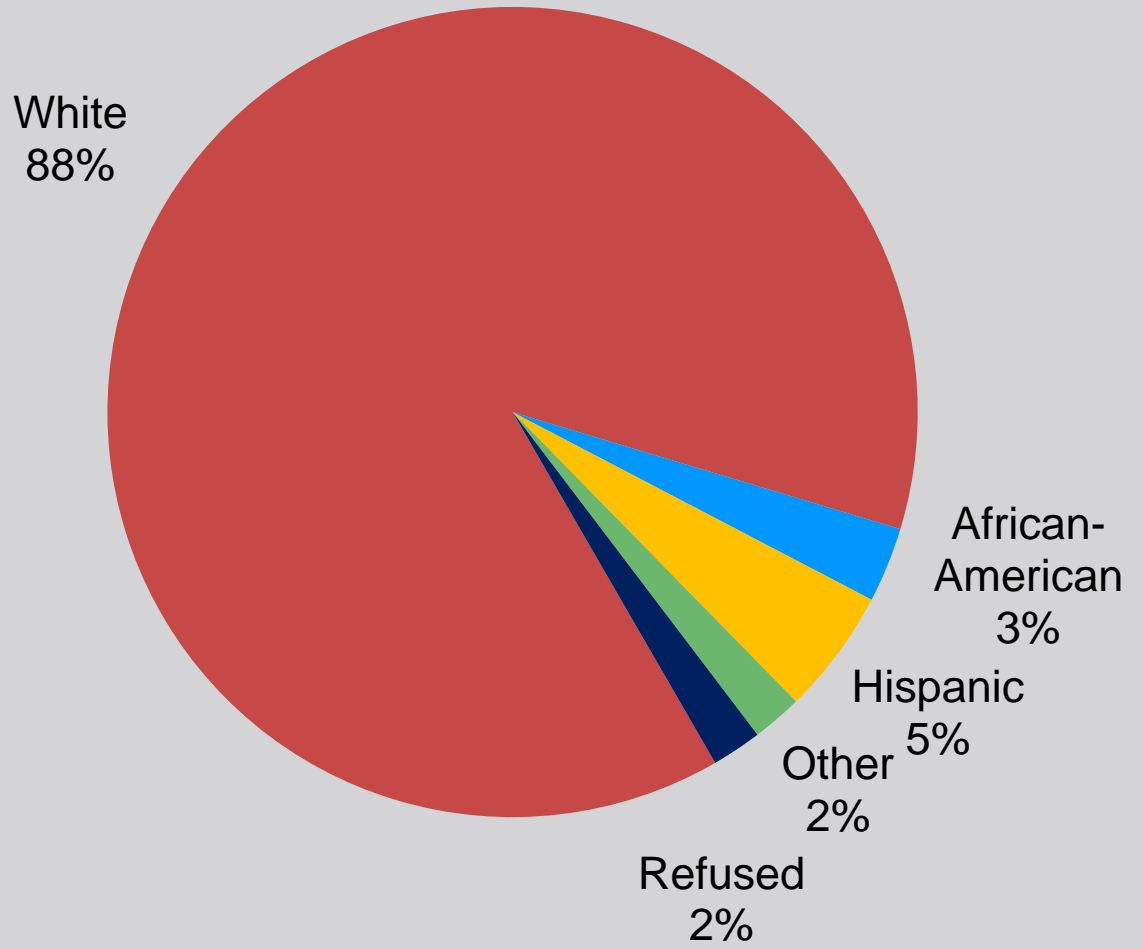


Who Are the Country P1s?

Persons 12+



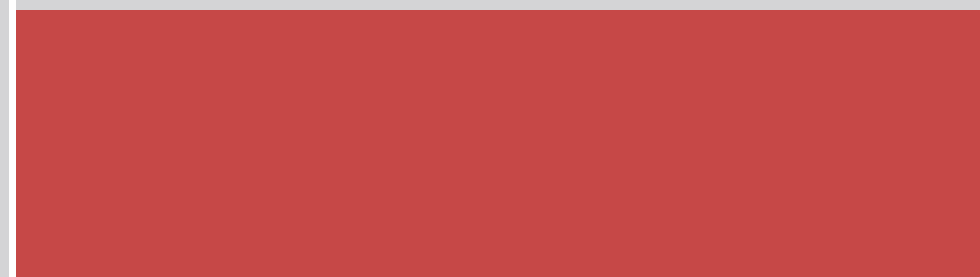
Country P1s



% Who Live in Homes With Internet Access

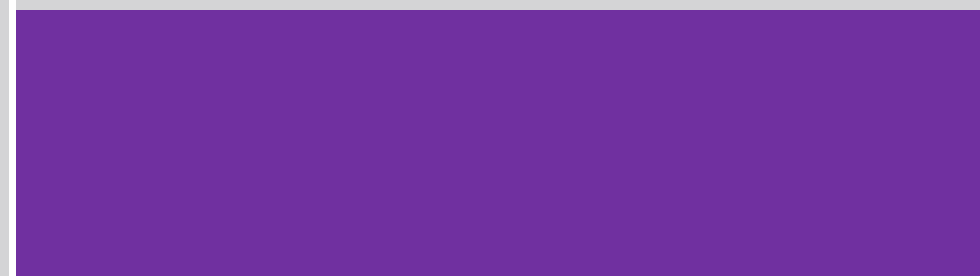


Persons 12+



81%

Country P1s



80%

Online Radio & Video



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% Who Have Listened to Online Radio in the Last Week



Persons 12+

36%

Country P1s

30%

% Who Are Aware of Pandora



Persons 12+



70%

Country P1s



74%

% Who Have Listened to Pandora in the Last Month



Persons 12+

31%

Country P1s

29%

% Who Have Listened to Pandora in the Last Week



Persons 12+

22%

Country P1s

19%

% Who Are Aware of iHeartRadio



Persons 12+

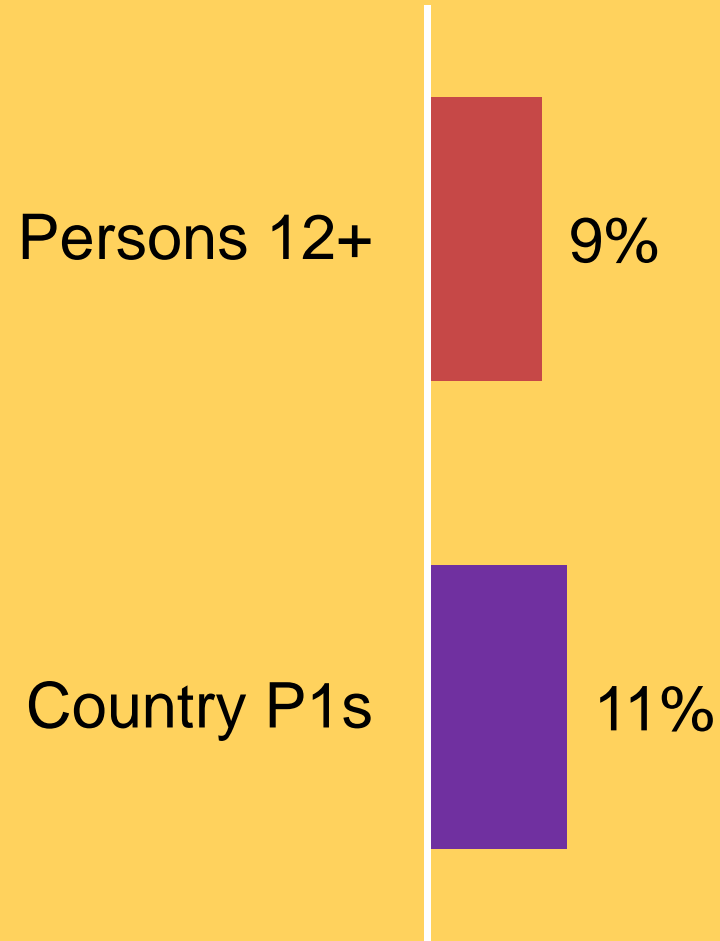
48%

Country P1s

49%



% Who Have Listened to iHeartRadio in the Last Month



% Who Are Aware of Spotify



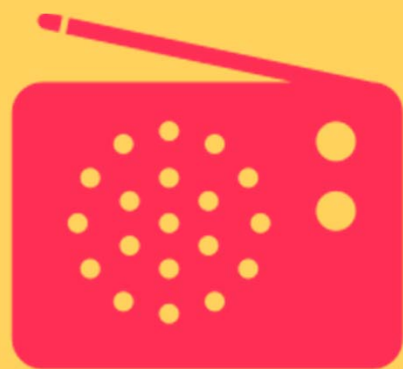
Persons 12+

28%

Country P1s

29%

% Who Are Aware of iTunes Radio



iTunes Radio

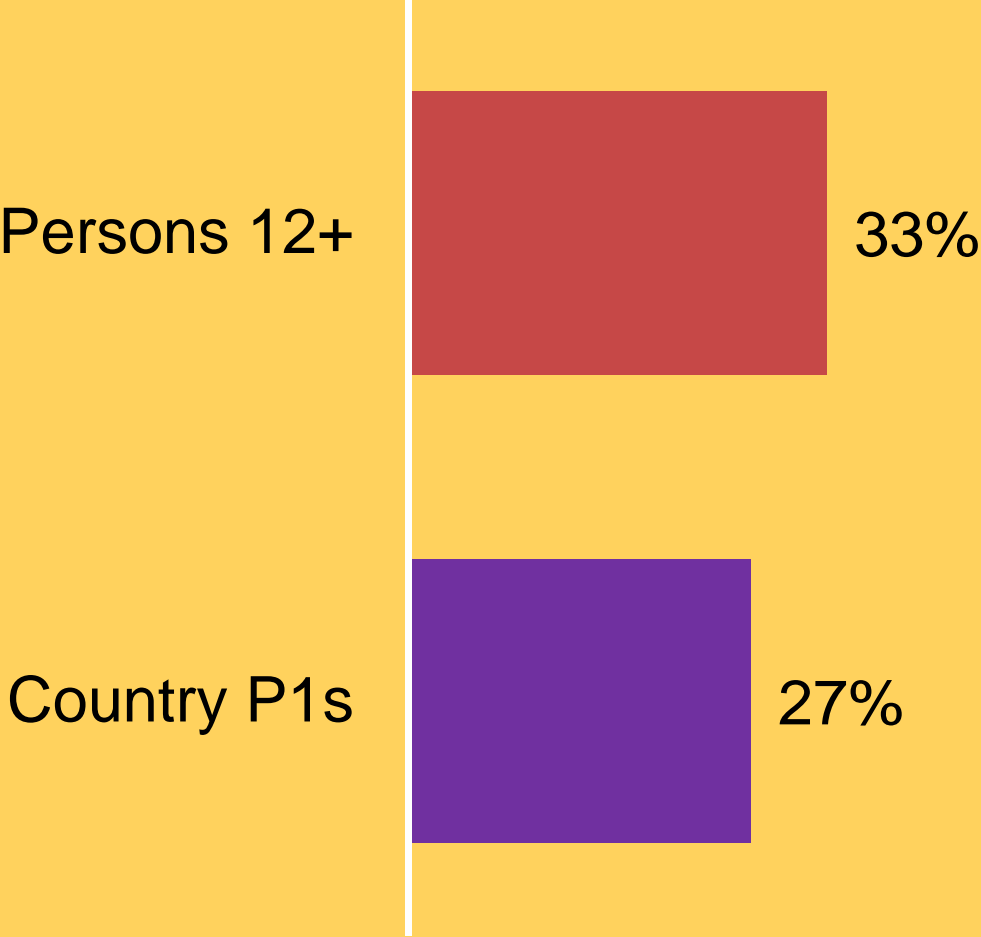
Persons 12+

47%

Country P1s

53%

% Who Have Used YouTube to Watch Music Videos or Listen to Music in the Last Week



Smartphones and Other Mobile Devices



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% Who Always Have Their Cell Phone Within Arm's Length



Persons 12+



53%

Country P1s



55%

% Who Own a Smartphone



Persons 12+

61%

Country P1s

60%

% Who Own a Tablet



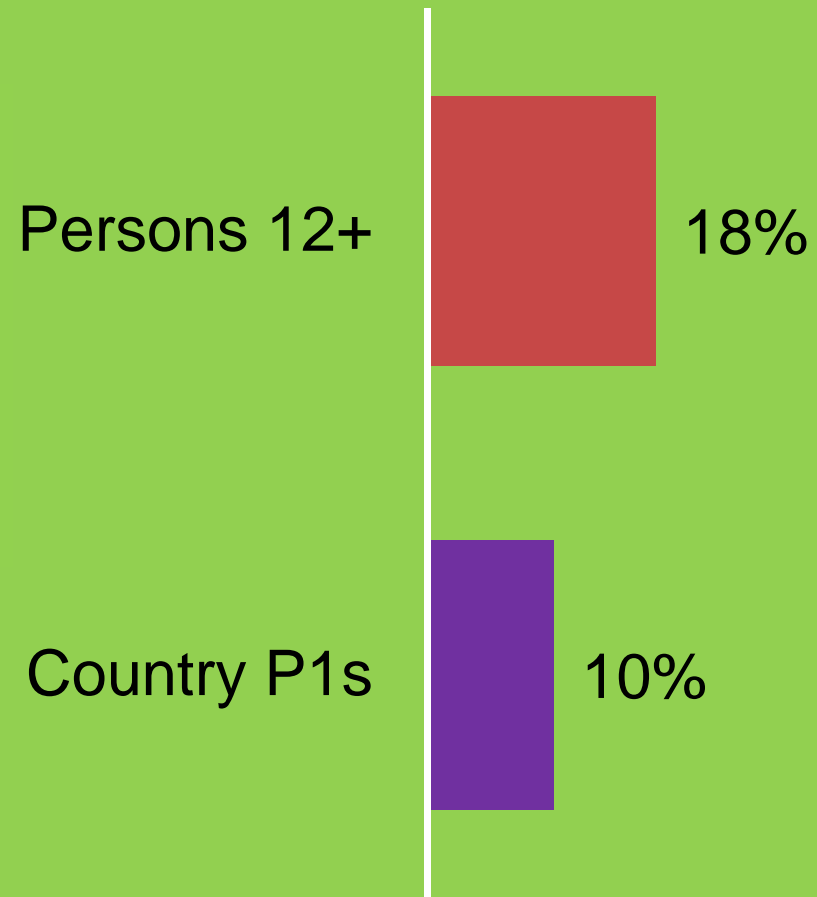
Persons 12+

39%

Country P1s

38%

% Who Have Ever Downloaded the Shazam App to Smartphone or Other Device



Base: Own a Smartphone



Country Radio P1 Listener Insights



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% Who Listen Most Often to AM/FM Radio Stations Using Earbuds, Earphones or Some Other Type of Headset



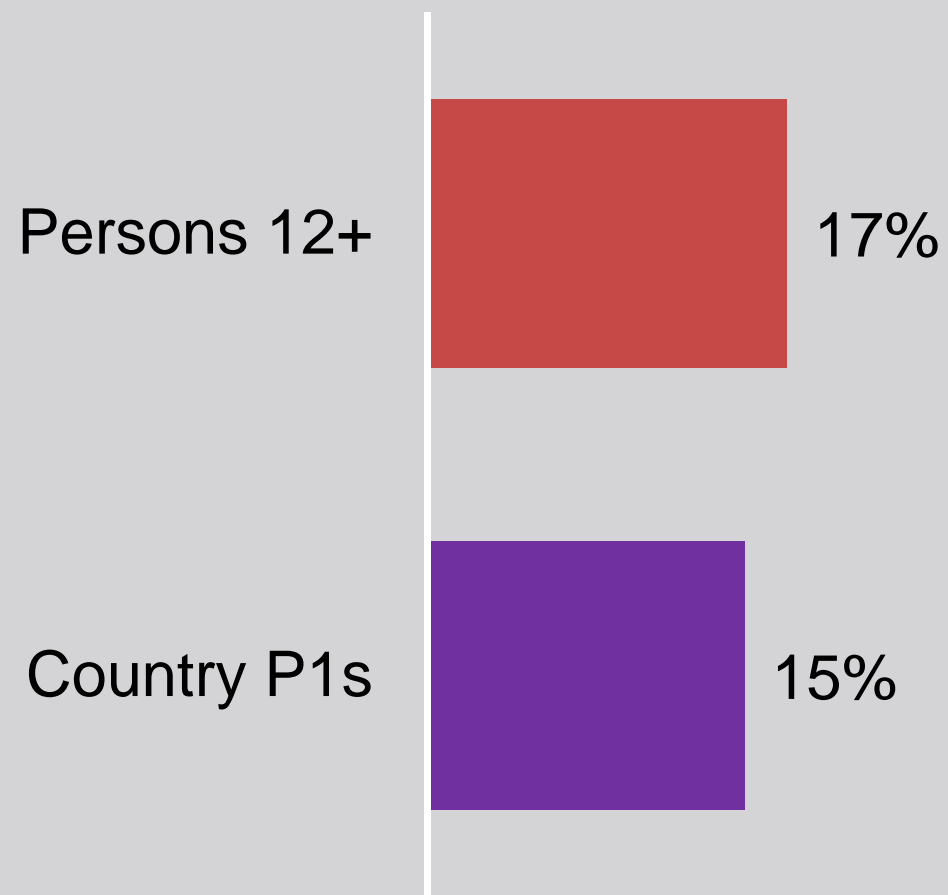
Persons 12+

4%

Country P1s

<1%

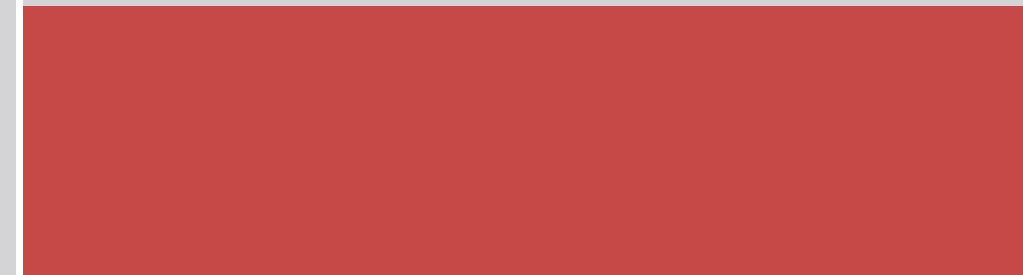
% Who Would Listen “a Lot More” if their Cell Phones Had an FM Radio Tuner



% Who Think Listening to Commercials Is a Fair Price to Pay for Free Programming on AM/FM Radio Stations



Persons 12+



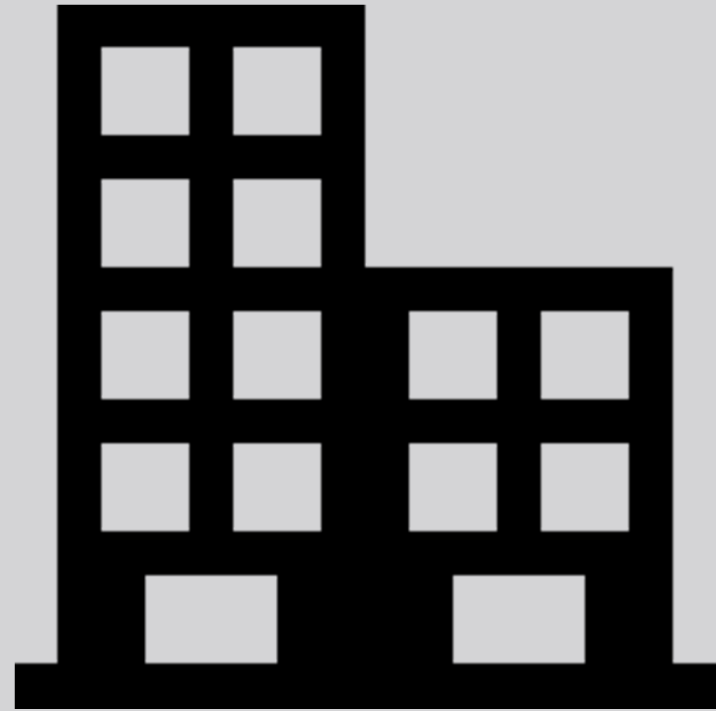
80%

Country P1s



83%

% Who Listen to the Radio While Working



Persons 12+

40%

Country P1s

48%

% Who Listen to the Radio Over a Computer While Working



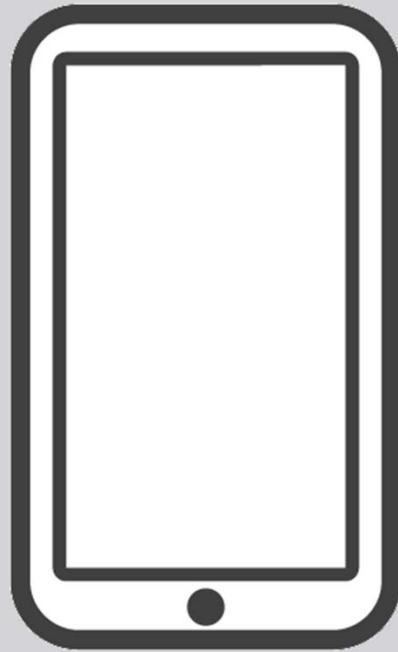
Persons 12+

22%

Country P1s

18%

% Who Listen to the Radio on a Mobile Device While Working



Persons 12+

16%

Country P1s

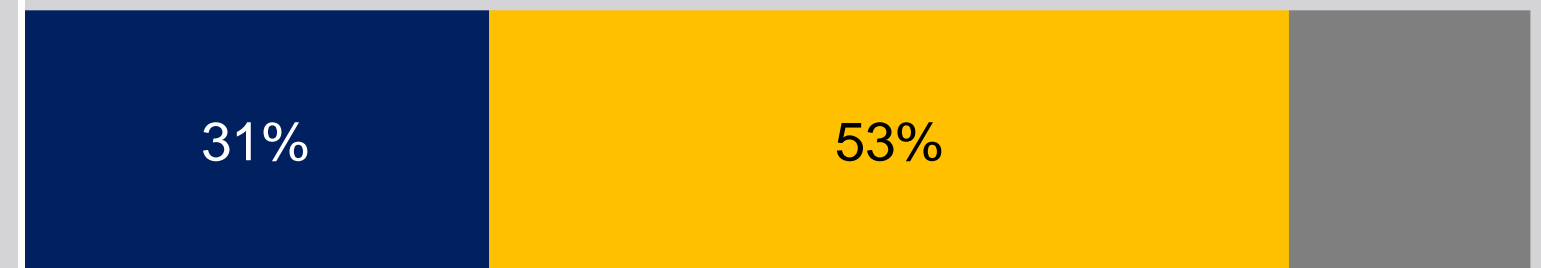
8%

AM/FM Radio Stopset Length Preference:

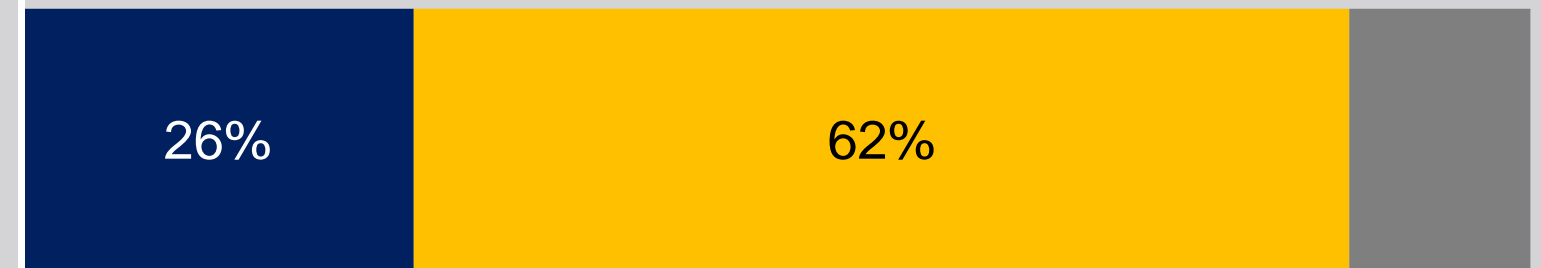


- Long blocks of programming; long blocks of commercials
- More frequent stops with shorter blocks of commercials
- Don't Know

Persons 12+



Country P1s



Social Networking



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% Who Have a Profile on Any Social Network



Persons 12+

67%

Country P1s

71%

% Who Have a Profile on Facebook



Persons 12+



58%

Country P1s



62%

Average Number of Facebook Friends



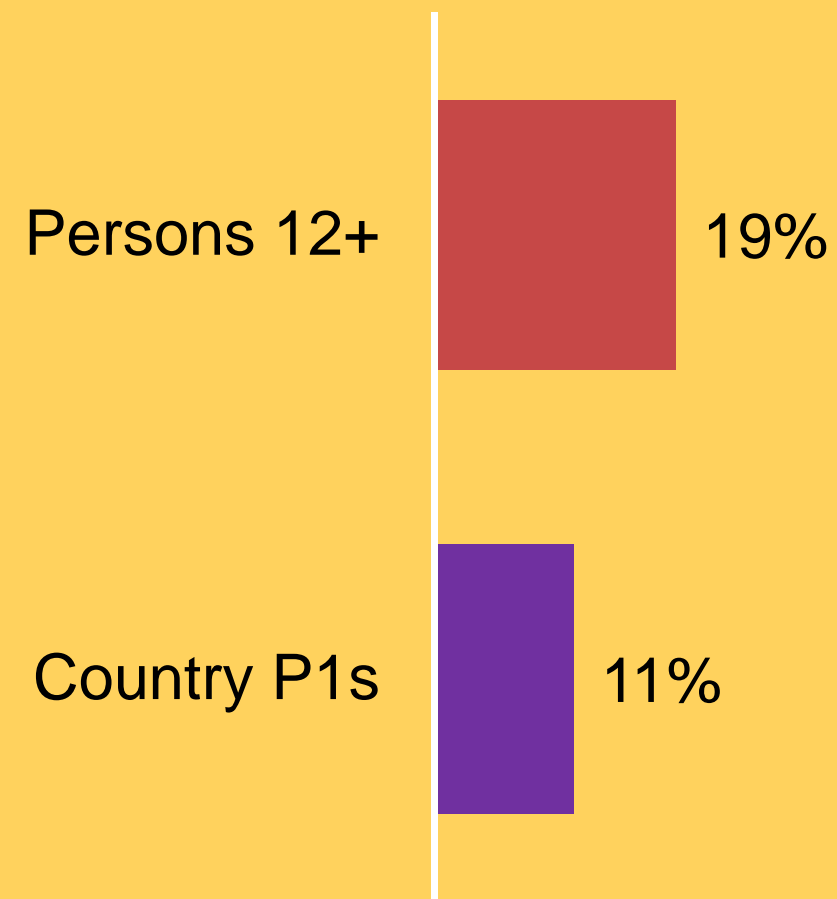
Persons 12+

350

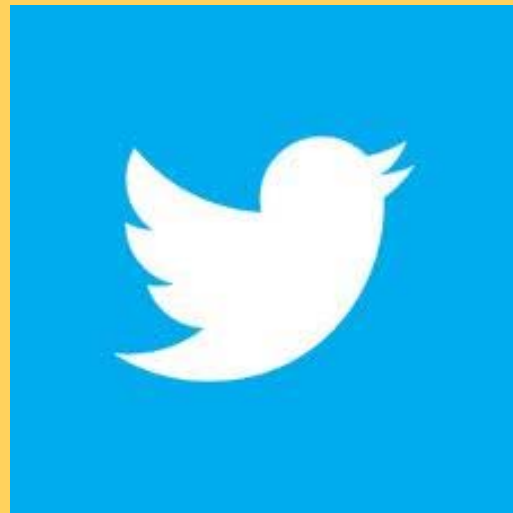
Country P1s

391

% Who Have a Profile on LinkedIn



% Who Currently Use Twitter



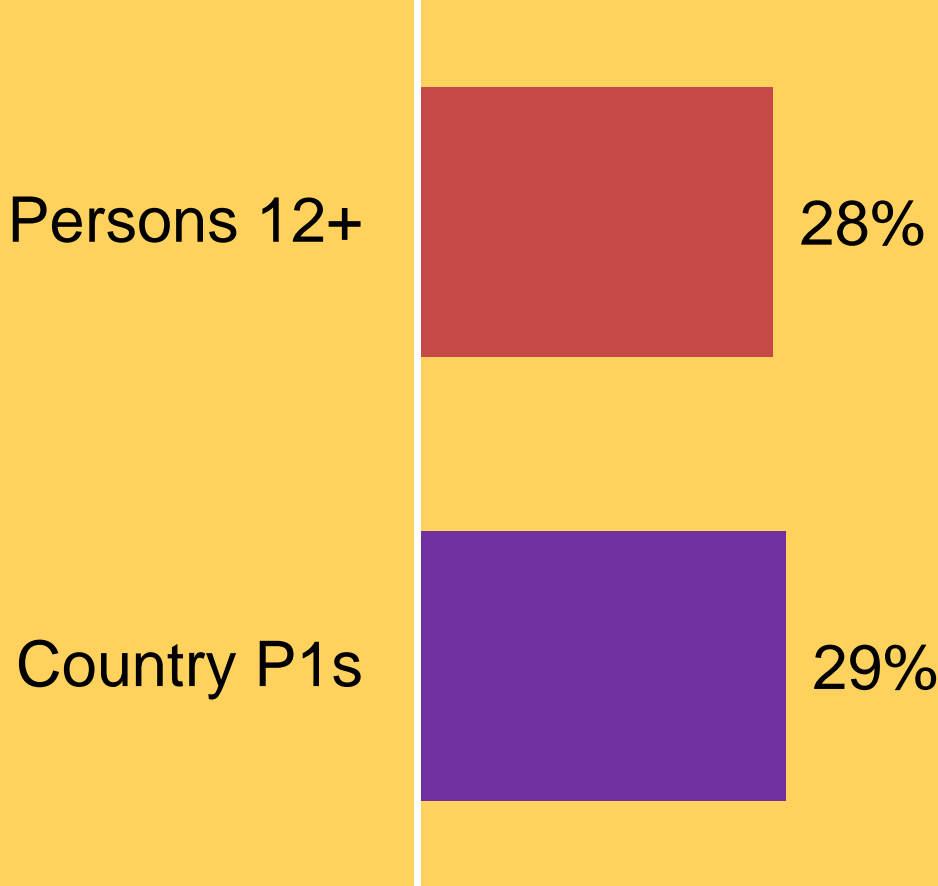
Persons 12+

16%

Country P1s

12%

% Who Use Social Networking Sites “Several Times per Day”



In-Car Media



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% of Drivers/Passengers Who Currently Ever Use AM/FM Radio in Primary Car



Persons 18+



Country P1s



% of Drivers/Passengers Who Currently Ever Use SiriusXM Satellite Radio in Primary Car



Persons 18+

17%

Country P1s

16%



Music Discovery



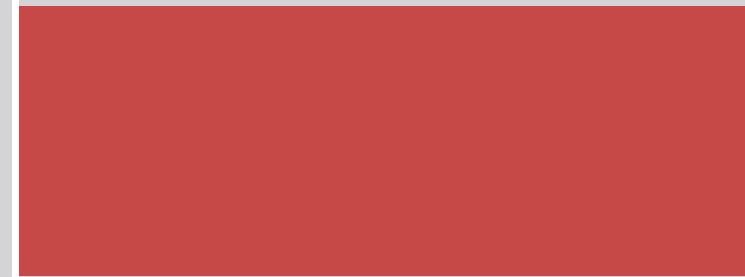
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% Who Say It Is “Very” or “Somewhat” Important to Keep Up-to-Date With Music



Persons 12+



47%

Country P1s

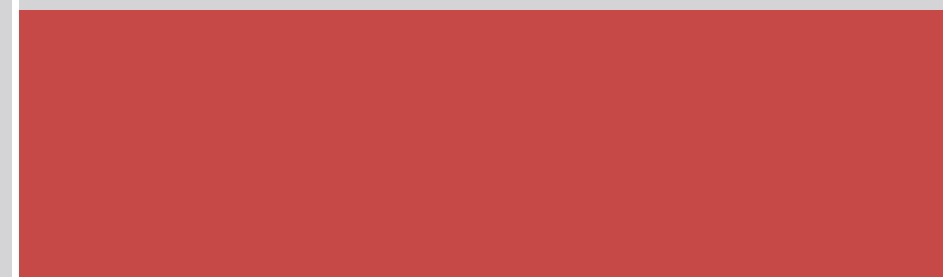


51%

% Who Use AM/FM Radio to Find Out About Music



Persons 12+



75%

Country P1s



78%

Observations



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Observations

- Country P1s are less likely to listen to Online Radio overall, and lag behind on Pandora usage
- Smartphone and tablet ownership is on par with the total
- More likely to listen to the radio while working, though less likely to do so on a computer or mobile device
- Higher Facebook usage, though lower LinkedIn and Twitter usage

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