

THE INFINITE DIAL

The Heavy Radio Listeners Report

April 2018





Survey Methodology

- In January/February 2018, Edison Research conducted a national telephone survey of 2000 people aged 12 and older, using random digit dialing techniques to both cell phones and landlines
- Survey offered in both English and Spanish languages
- Data weighted to national 12+ population figures
- Each year's information reflects the same approach
 - Year-over-year changes should reflect 'actual' changes



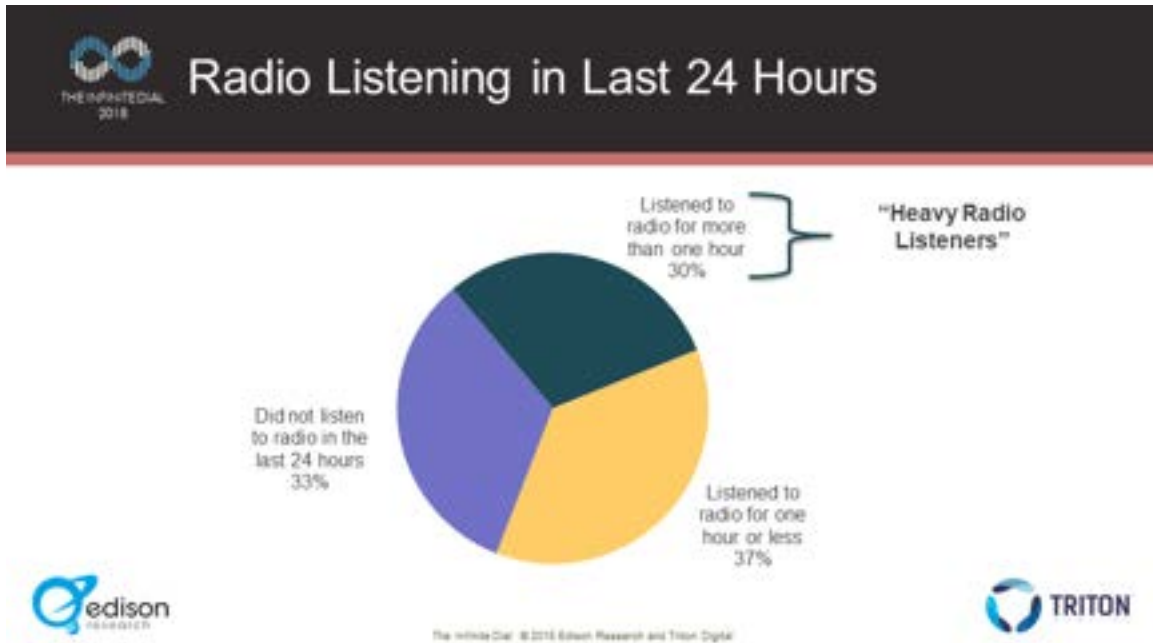
The Infinite Dial © 2018 Edison Research and Triton Digital



The first thing to concentrate on with this report is the nature of the sample. This study is a 'gold standard' representation of the US population. All the approaches that are required for have a survey accurately reflect the behaviors and attitudes of all Americans have been taken. The sample reflects US Census estimates for age, sex, region of the country, and ethnicity. In addition, we take the same approach every year. Thus, where you see changes over time, you can be confident that these changes are *not* be influenced by a change in sampling policies. This information reflects a best effort to fully and correctly show the 'answers' among the US population.

It is worth noting that this is a telephone survey, and thus it reaches virtually the entire US population. The number of people without any telephone number at all is extremely tiny. However, still about 11% of Americans do not have internet. So internet samples don't reach those people. In addition, almost all internet surveys are heavily biased towards heavy internet users. As such, most internet-based surveys significantly overstate internet-based behaviors.





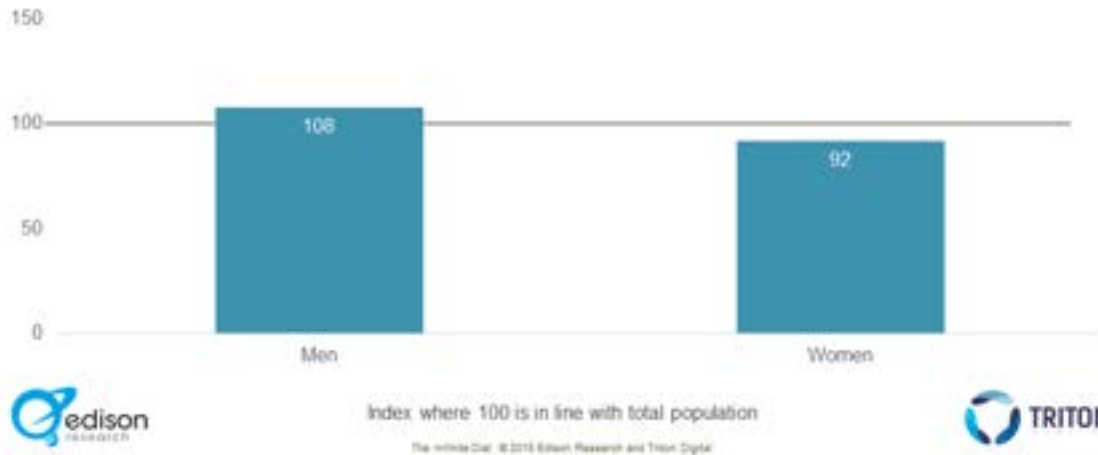
Each year in Edison’s Infinite Dial study we ask this question – “How much time in the last 24 hours did you spend listening to radio?” Two-thirds of respondents said they had listened to the radio in the previous 24 hours (remember – this is asking about *daily* usage – so the number is lower than the weekly number that many are used to seeing from Nielsen. However – this finding supports the high reach totals that we know radio achieves. If it’s two-thirds in one day – over the course of a week the number will likely end up over 90%, as Nielsen shows.

However this report is concerned with the dark-blue group on the chart – those who said they had listened for more than one hour in the day before we called them. Three in ten Americans age 12 and over fit into this group. How are they different from the other 70%? How are they the same? What information from Infinite Dial can radio use to make sure that these people remain heavy listeners? We will go through the key findings.

One thing to bear in mind – the question is as above: “...listening to radio.” We don’t specify AM/FM radio. While it is likely that in most cases people will think of AM/FM radio when asked this question, the response means however the respondent chose to understand it.



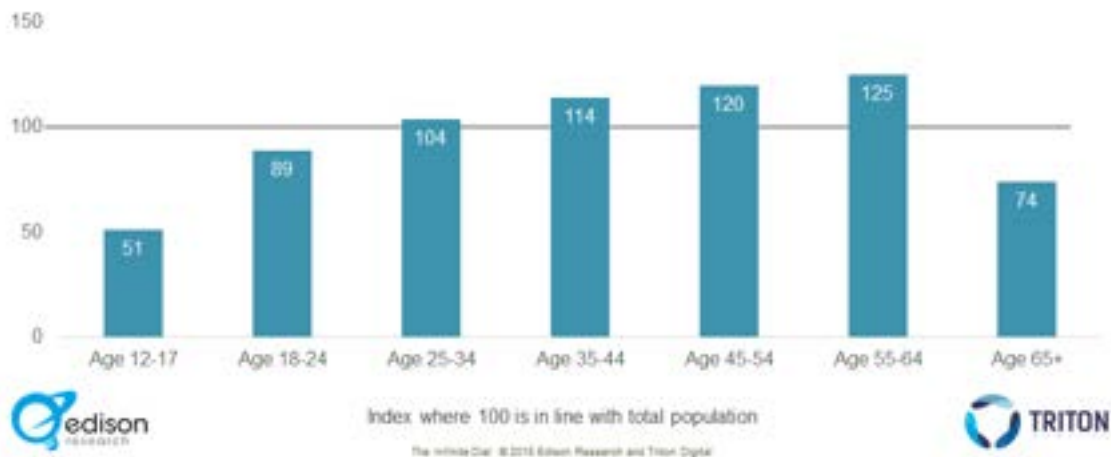
Heavy Radio Listeners: Sex



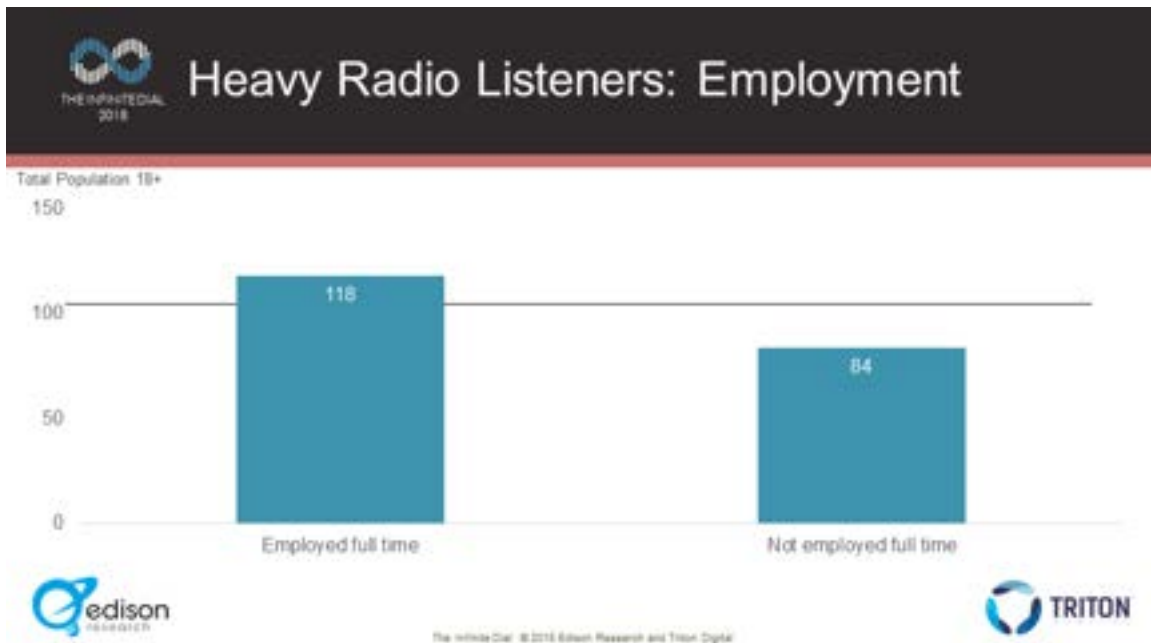
Who are radio's heavy listeners? They lean slightly to men. In other words, men are 8% more likely to be heavy listeners than their share of the population, and women 8% less likely.



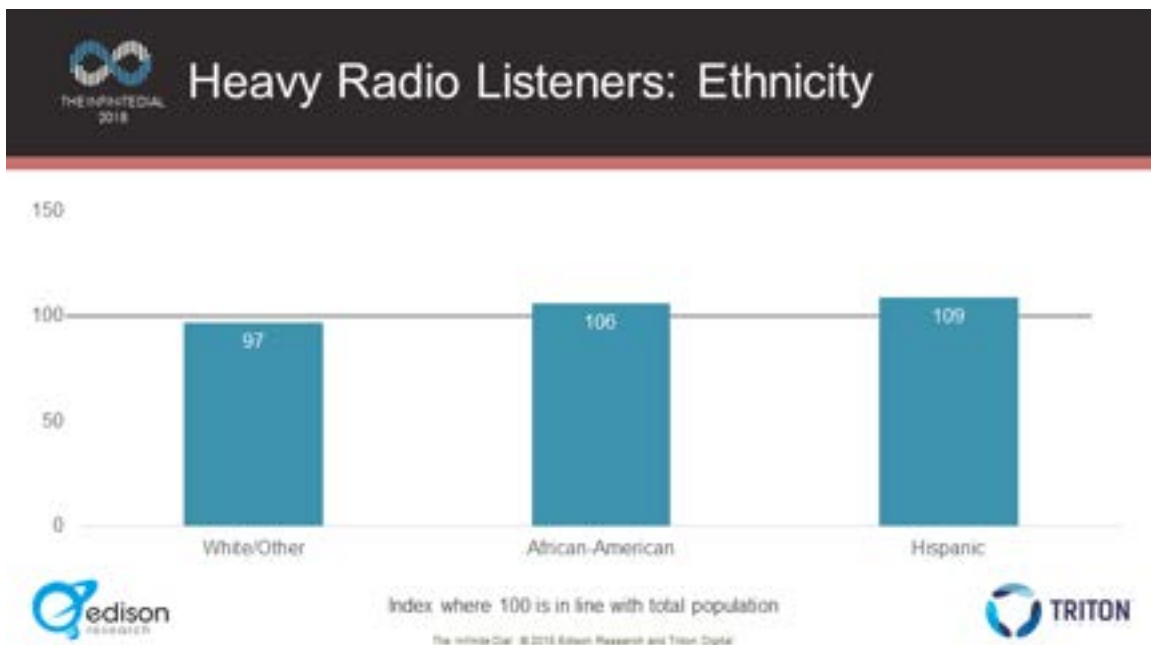
Heavy Radio Listeners: Age



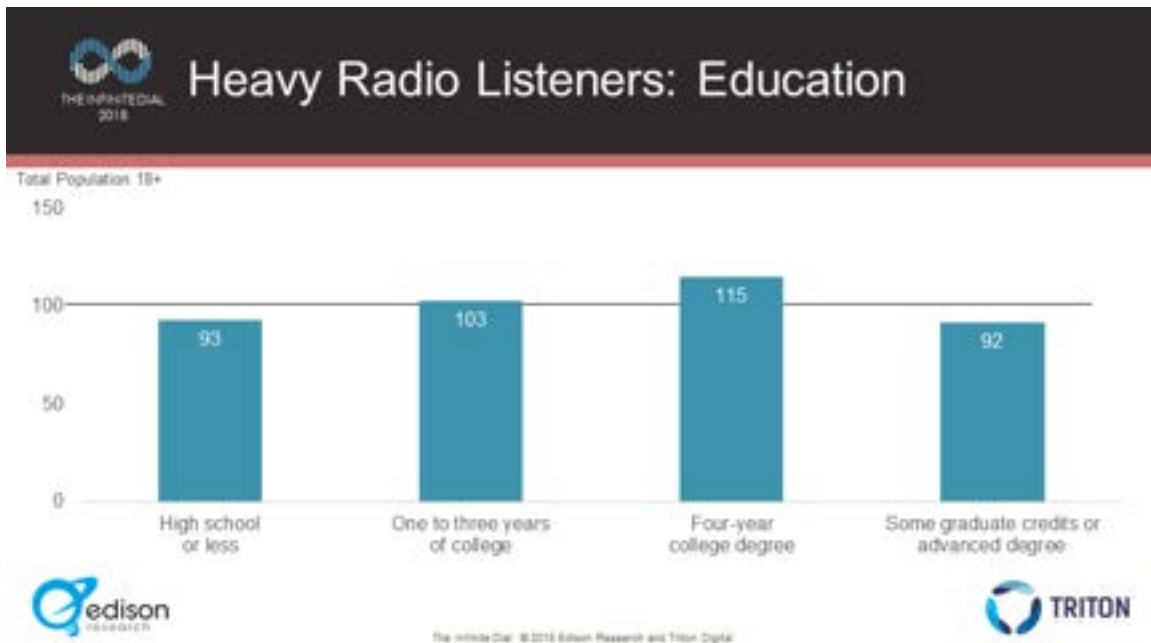
Radio's heavy listeners skew older, which likely will not surprise many readers of this report. As we know from this and other research, there is a strong correlation with employment and heavy radio usage. This graph essentially tracks the likelihood to be employed.



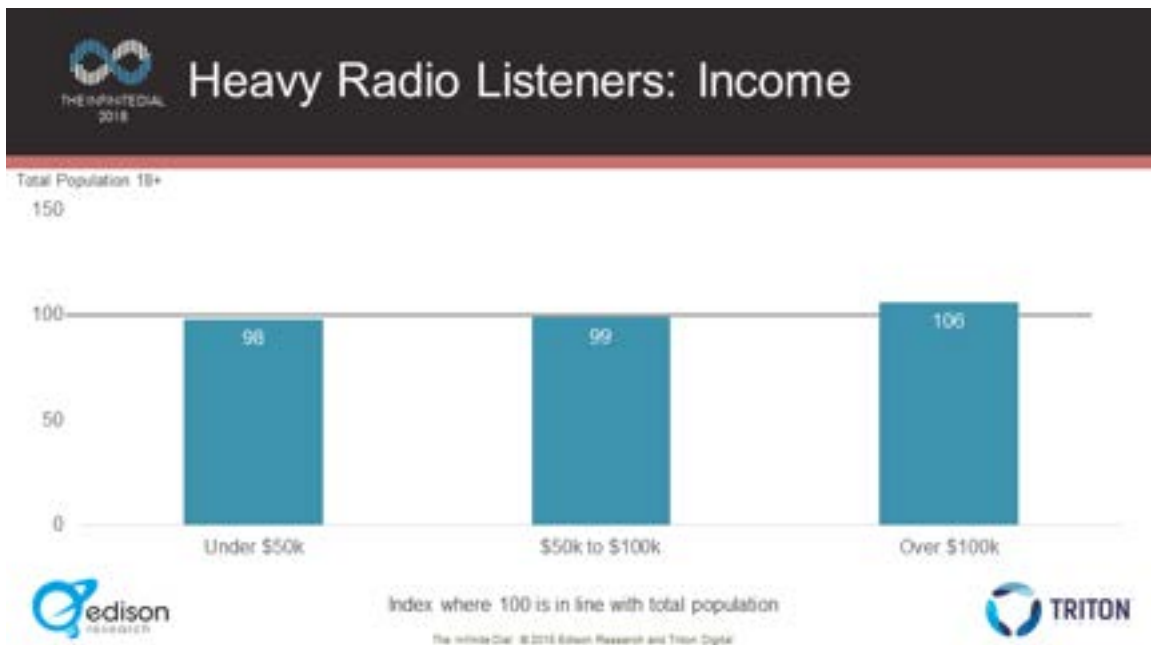
One of the most distinctive aspects of the “Heavy Radio User” demographic is employment. If you have a full-time job, you are much more likely to be a heavy radio user. These people are commuting, perhaps listening at-work, and in many cases listening at home as well. Those with full-time jobs of course have so many other characteristics that are attractive to advertisers.



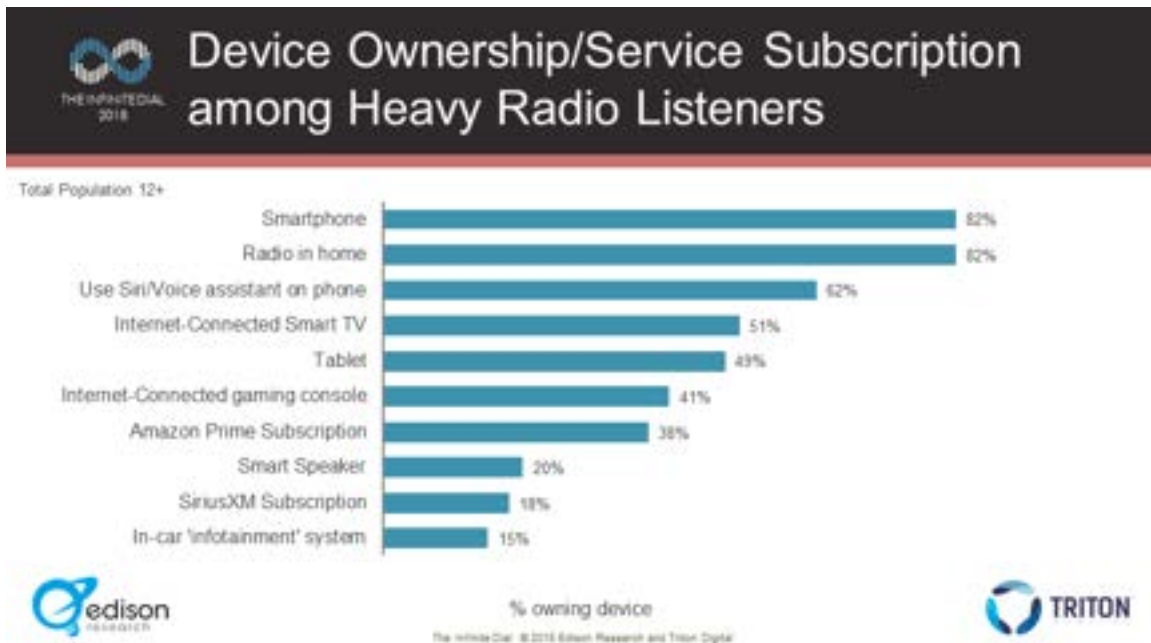
While there is not a strong difference by ethnicity, African-Americans and Hispanics are slightly more likely to be heavy radio consumers than their share of the population.



Heavy radio listeners are well-educated, especially among the large group with four-year college degrees.



Radio's heavy listeners skew a bit to higher income levels as well. In all – radio's heavy listeners present a powerful profile for advertisers or underwriters.

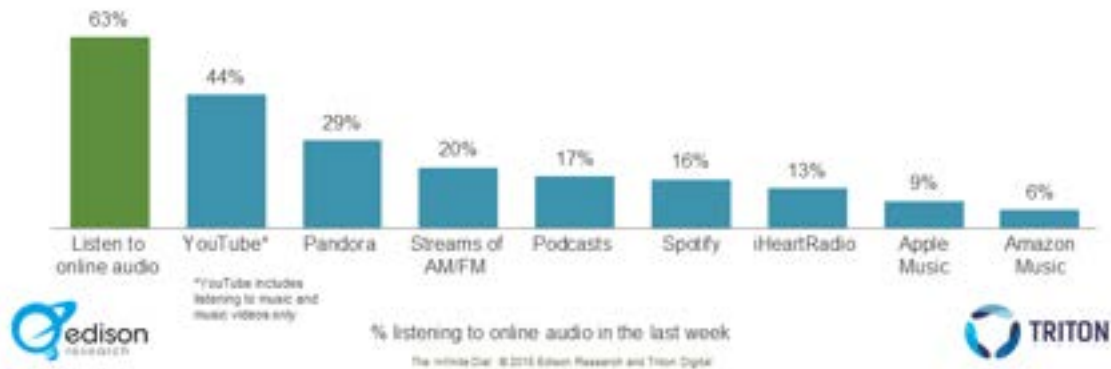


Throughout the report you can compare these numbers to the population at large, but here on one page is the likelihood to own various devices or subscribe to certain services among “Heavy Radio Listeners.” You will note that 18% of heavy radio listeners achieve their status without owning a single radio in their home; evidently they have enough in-car or at-work listening to qualify anyhow. As of today, 20% of American heavy radio listeners have a Smart Speaker – but only a tiny number have a Smart Speaker but no radio at home.

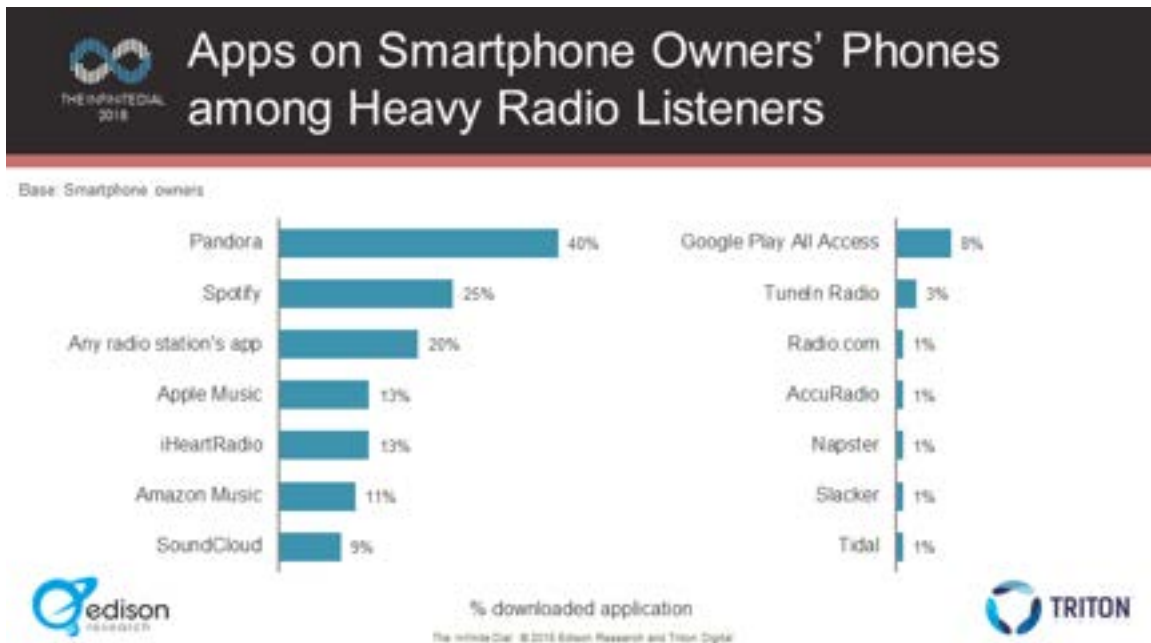
Some other items for radio managers to consider: Yes, the overwhelming majority of heavy radio users have a smartphone – but nearly one-in-five does not. A strong majority of those with smartphones use the voice assistant – and we sit at the mere dawn of the new era of voice-enabled computer interfaces.

Weekly Online Audio Listening among Heavy Radio Listeners

Total Population 12+



Heavy radio listeners are also significant users of streaming audio. Nearly two-thirds are active users of online audio (the green bar does not include exclusive YouTube listeners). A very high number of heavy radio listeners have used YouTube to listen to music in the last week, and just under one-third say they have used Pandora in the week before taking our survey. One in five heavy radio listeners have listened to the stream of a broadcast radio station in the last week, and 17% have listened to a podcast.

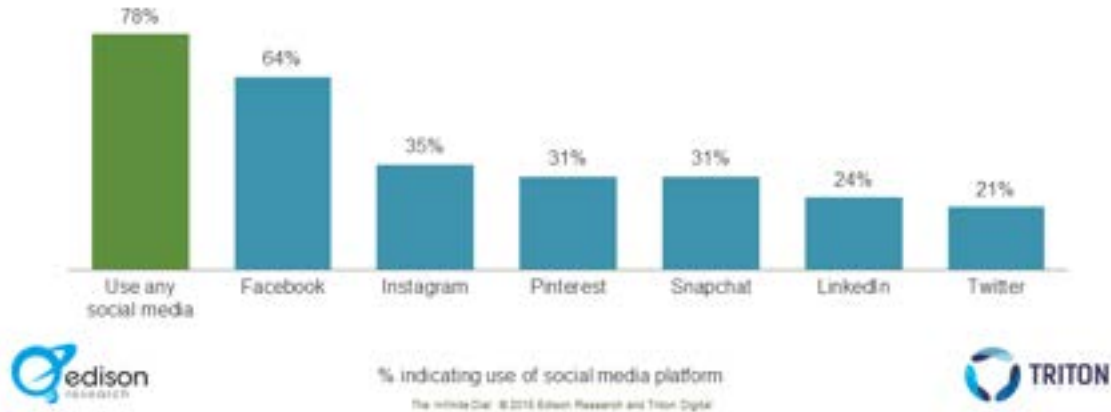


Among heavy radio listeners with a smartphone (82%), the most commonly downloaded audio app is Pandora, at 40%. This is followed by Spotify at 25%, and then 20% of heavy radio listeners have downloaded the app of a radio station onto their phones. Of course, the iHeartRadio stations don't have a 'radio station' app, they have their aggregated app – and 13% of heavy radio listeners have downloaded iHeartRadio.

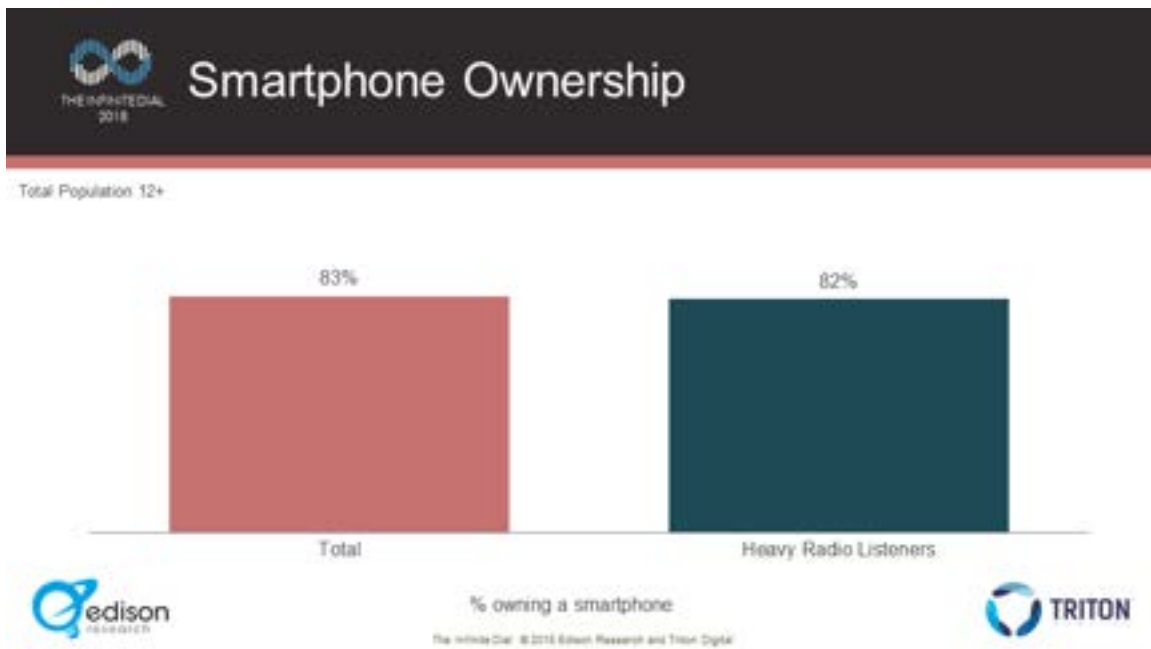


Social Media Usage among Heavy Radio Listeners

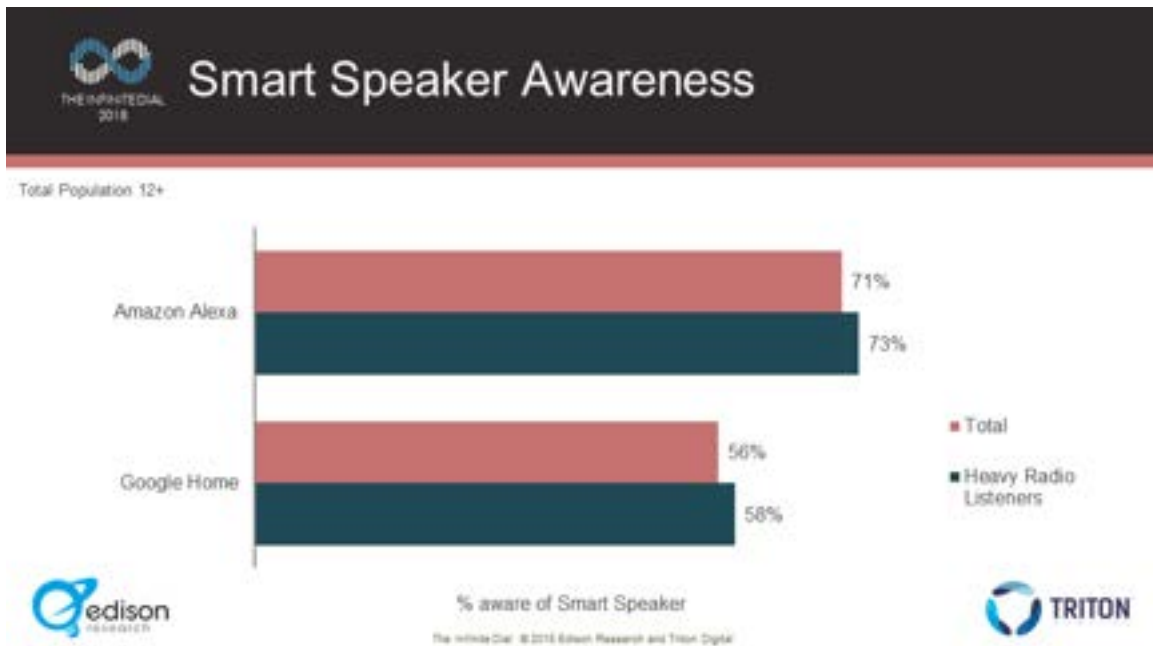
Total Population 12+



An overwhelming majority of heavy radio listeners use some form of social media, with Facebook the overwhelming leader in usage. Despite the prevalence of media discussion that surrounds Twitter, merely one-in-five heavy radio listeners actually use that platform.



Heavy radio listeners are equally likely to own a smartphone as the general population. It is worth noting however, that nearly one-in-five heavy radio listeners do *not* have a smartphone. These people should not be forgotten when you are talking to your listeners and finding ways to interact.



The hottest topic in audio right now is the rise of Smart Speakers. Heavy radio listeners are slightly more likely to be aware of the two principle brands in the space – Amazon Alexa and Google Home. Alexa has a fifteen percentage point edge for awareness over Google Home.



Smart Speaker Ownership

Total Population 12+



While 18% of all Americans have either an Alexa or a Google Home, the number is slightly higher for heavy radio listeners at 20%. Are heavy radio listeners more likely to seek out Smart Speakers? Or, as is more likely, the fact that radio's heavy listeners having higher incomes will explain this advantage. Or a bit of both.

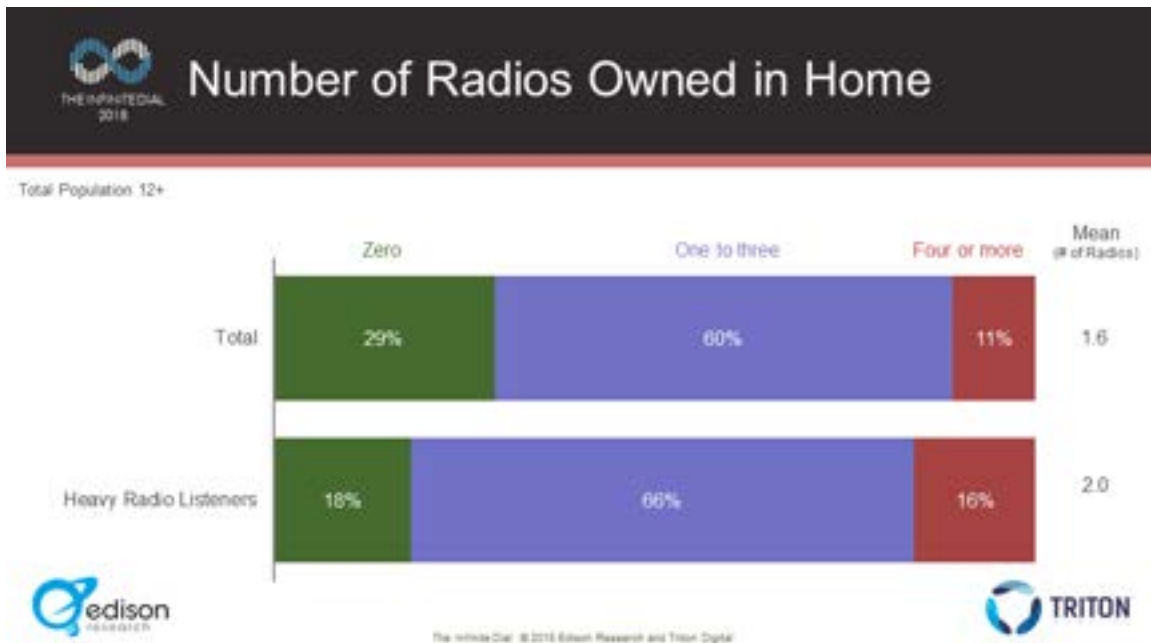


Number of Smart Speakers in Household

Base: Own a Smart Speaker

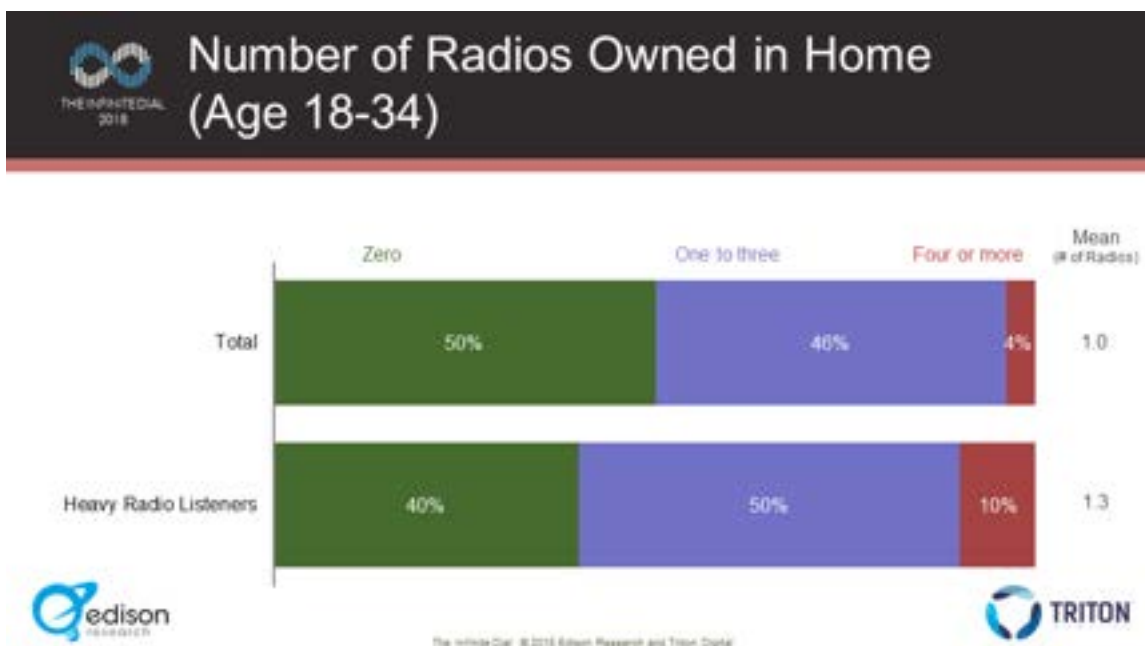


Among those who have a Smart Speaker, Heavy radio listeners are more likely to have acquired more than one. Doubtlessly that is part of what is making them heavy users.

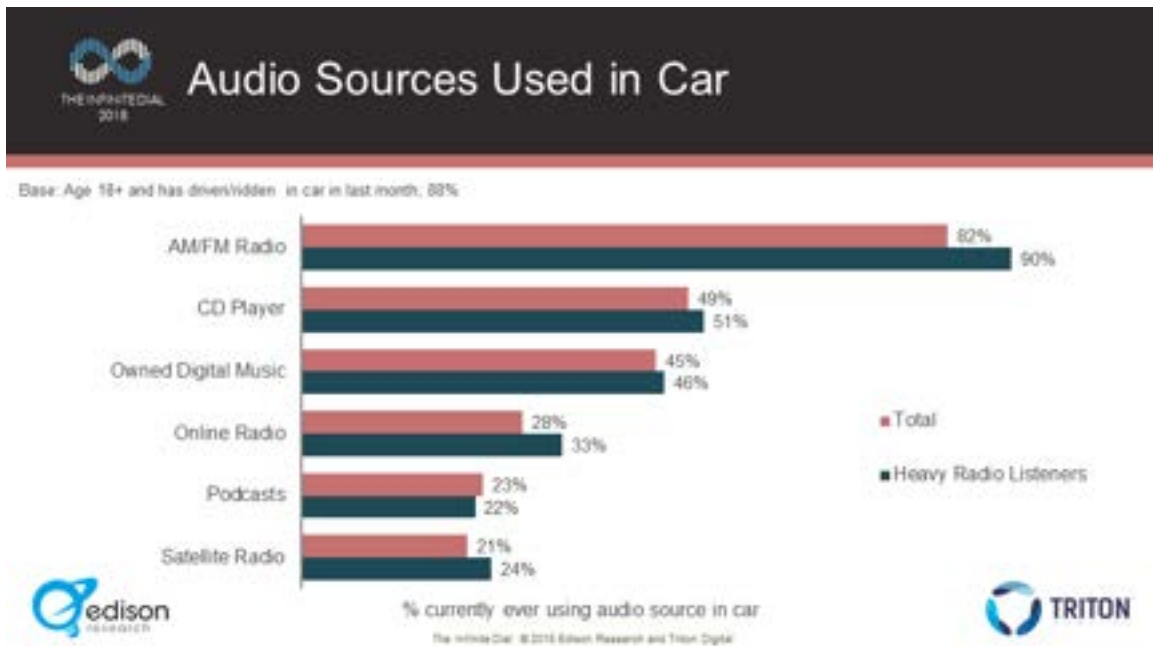


This is one of the key points in the deck. We asked all respondents how many radios they have in their homes, not including ones in their cars or trucks. In total 29% of Americans report not having a single radio in their homes, and the average number of radios is 1.6.

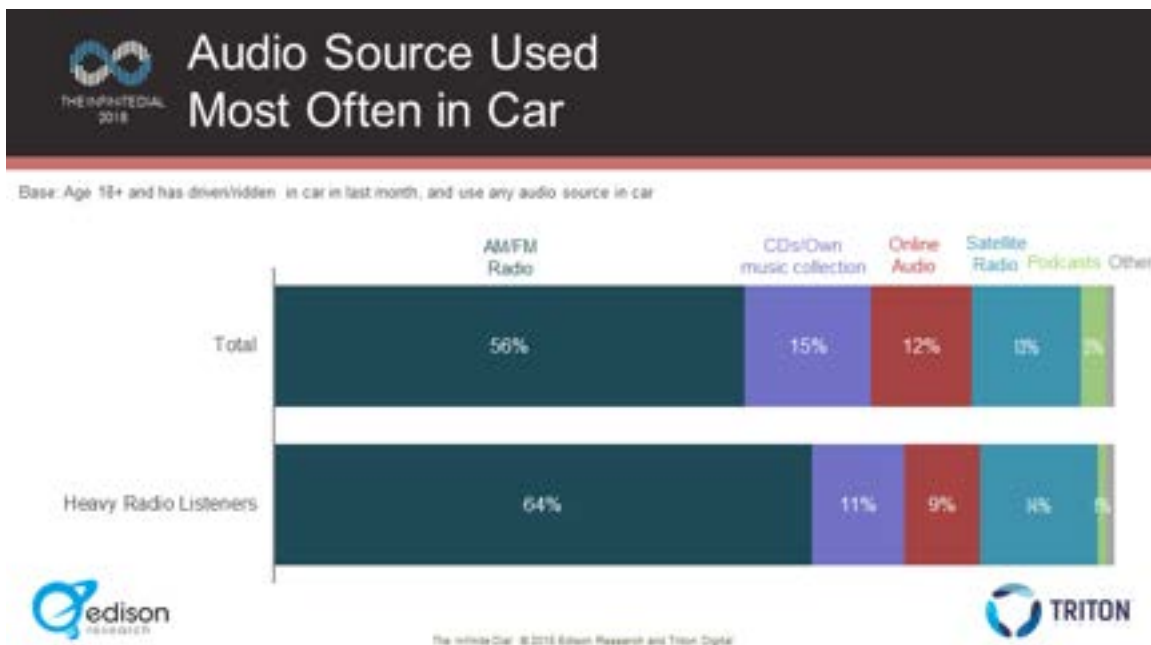
While it is not surprising that heavy radio listeners are more likely to have a radio in their homes, it is still noteworthy that 18% of heavy listeners don't have a single radio in their homes. This means that they are achieving 'heavy' status all from in-car and/or at-work listening. Radio faces a significant hardware problem in homes, even among heavy users.



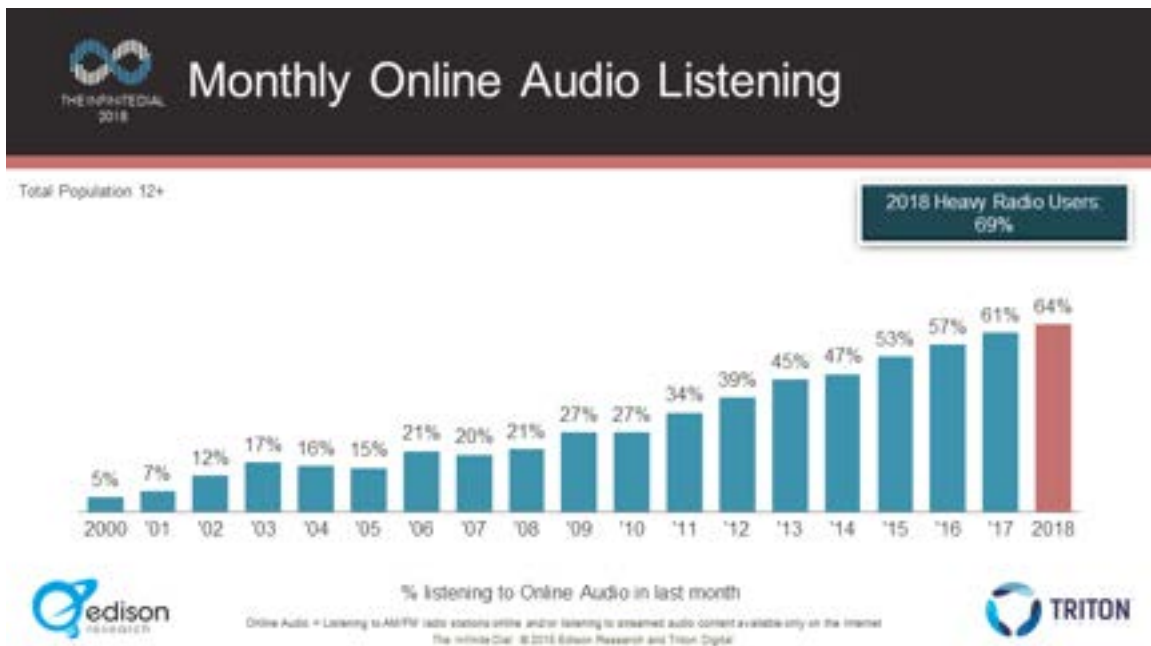
The in-home hardware issue becomes dramatically more pronounced among 18-34 year olds. Fully 40% of heavy listeners who are between these ages don't have a radio in their homes. And yet they listen a lot anyhow. This certainly speaks to the potential for Smart Speakers to bring radio back into homes.



Unsurprisingly, heavy radio listeners are more likely to tell us that they listen to AM/FM radio in their cars. They are also more likely to listen to online radio and satellite radio, although these numbers are well behind those for AM/FM.

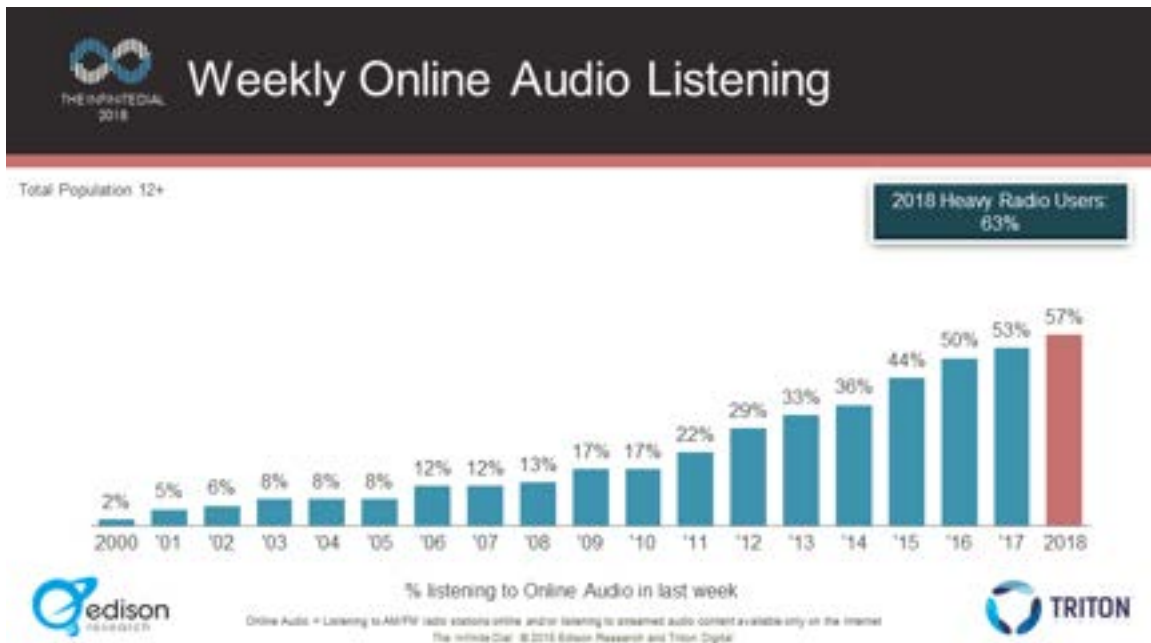


Again this is likely unsurprising, but to achieve “heavy” status, one is much more likely to listen to AM/FM radio in the car. Just under 2/3rds of heavy radio listeners said AM/FM is the audio source they use most in their cars, eight percentage points higher than for the total population of car drivers and riders. Owned music and streaming are, naturally, lower among heavy radio listeners.

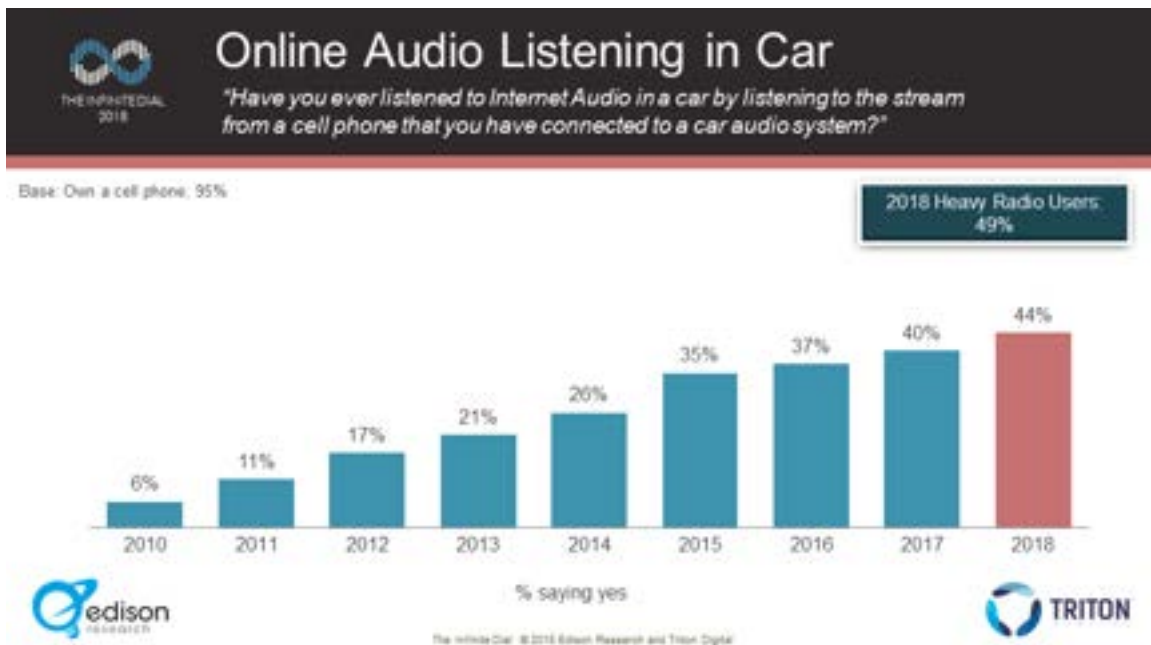


One of the great aspects of the Infinite Dial research study is tracking items over many years, using the same methodology against the same sample. We have been tracking this item now for nineteen studies: have you listened to online radio – either the streams of AM/FM or to pureplays like Pandora or Spotify – in the last month. What started as 5% in 2000 has now grown to 64% today.

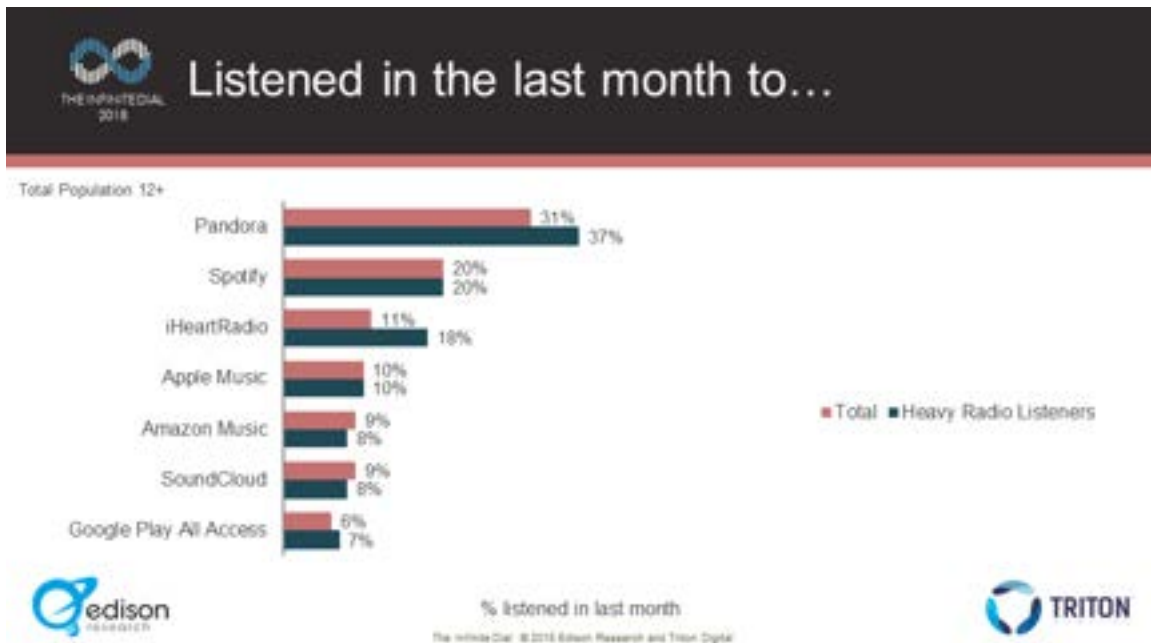
Interestingly, heavy radio listeners are even more likely to have consumed online audio – 69%. This of course can mean that online listening is contributing to their being ‘heavy’ users. Still, it is not the case that heavy radio users are not internet users. On the contrary.



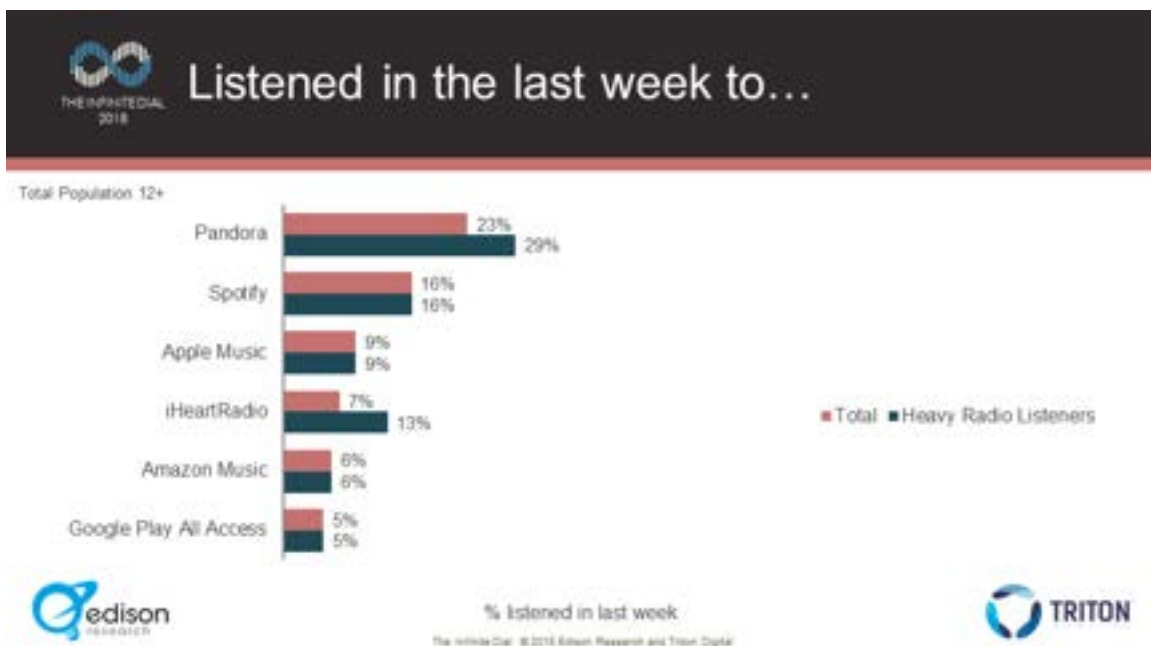
The phenomenon is the same when we look at weekly online audio consumption. While 57% of all Americans age 12 and older now say they have listened online in the week before they were called, heavy radio listeners check in at 63%.



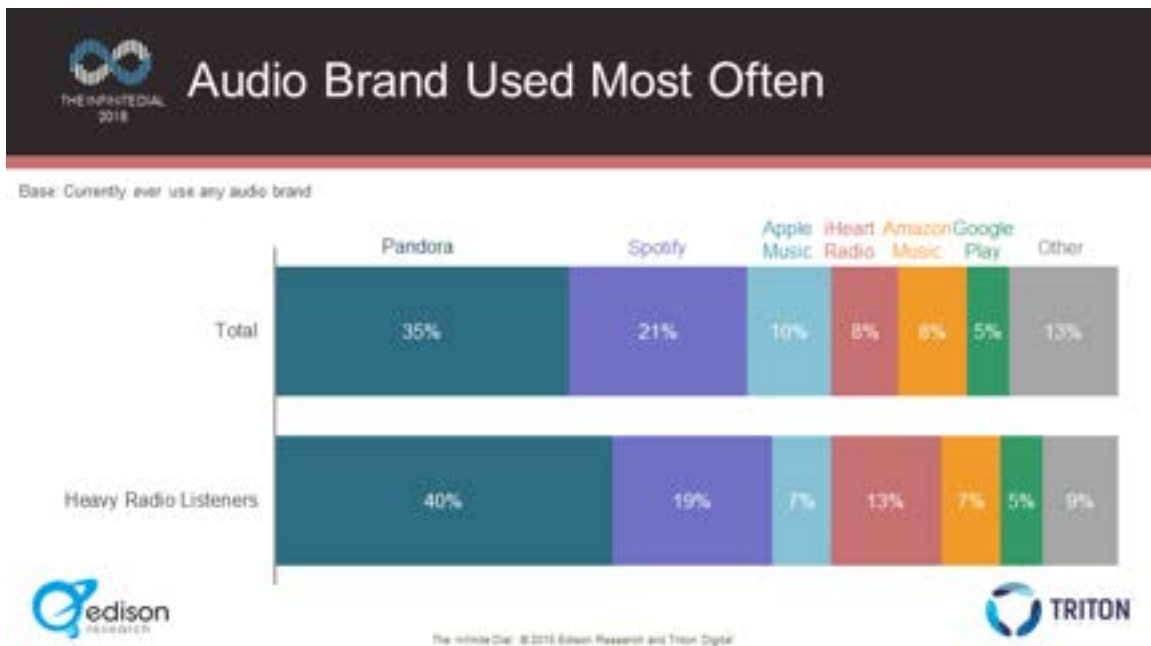
Yet another intriguing finding is that heavy radio listeners are more likely to have connected their phones in their cars in order to listen to streamed audio. While 44% of all cell phone owners have engaged in this behavior, the number rises to 49% among heavy radio users.



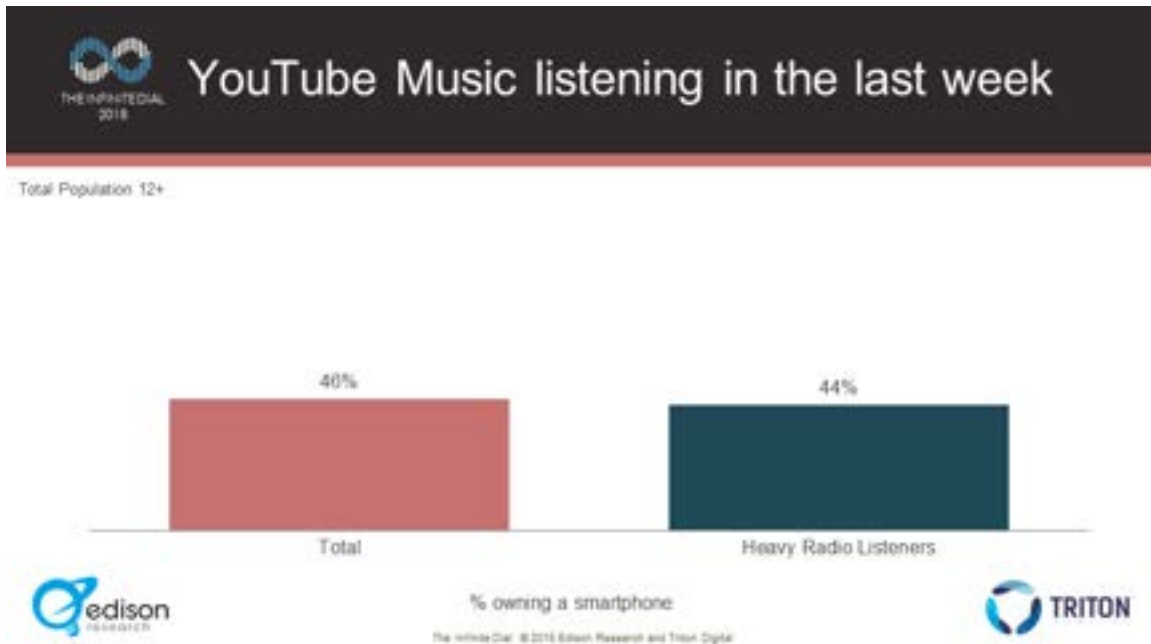
Heavy radio listeners are much more likely to use the two brands that position themselves around radio. While the rank order for the total and heavy listeners is the same, both Pandora Internet Radio and iHeartRadio are much more heavily used on a monthly basis among heavy radio users. iHeart, in particular, makes sense as some significant portion of heavy radio listeners will be hearing about iHeartRadio while engaging in that heavy listening to iHeart stations.



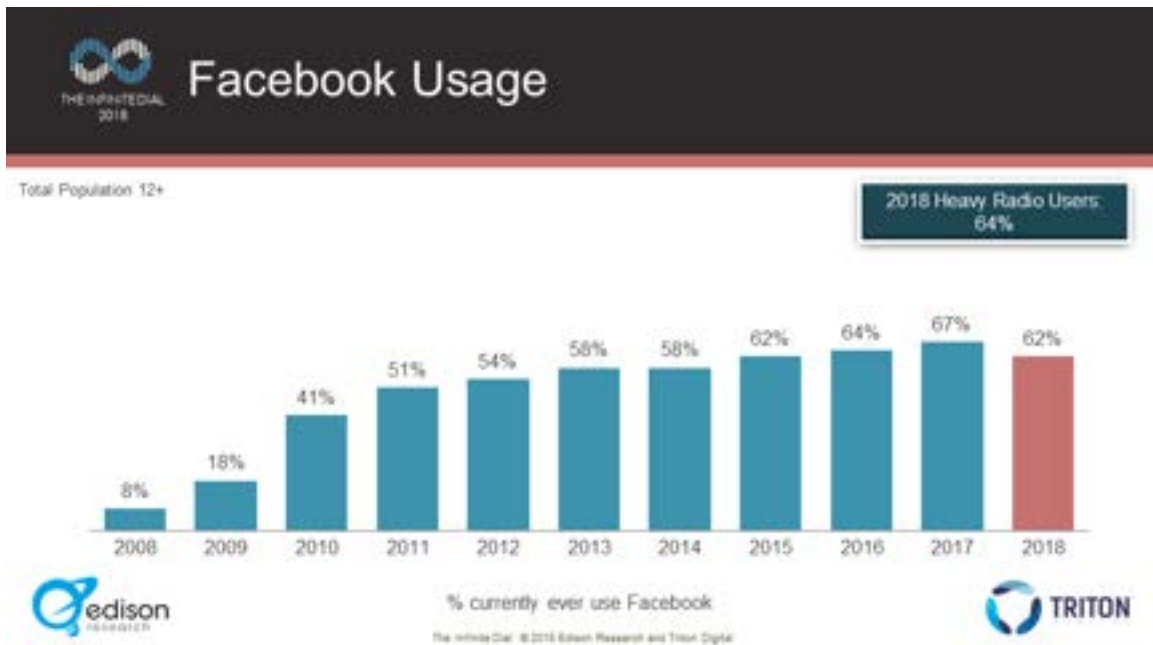
Heavy radio listeners are more likely to have listened to Pandora and iHeart in the last week than the total. Interestingly, heavy radio users are no *less* likely to have used Spotify, Apple, Amazon or Google.



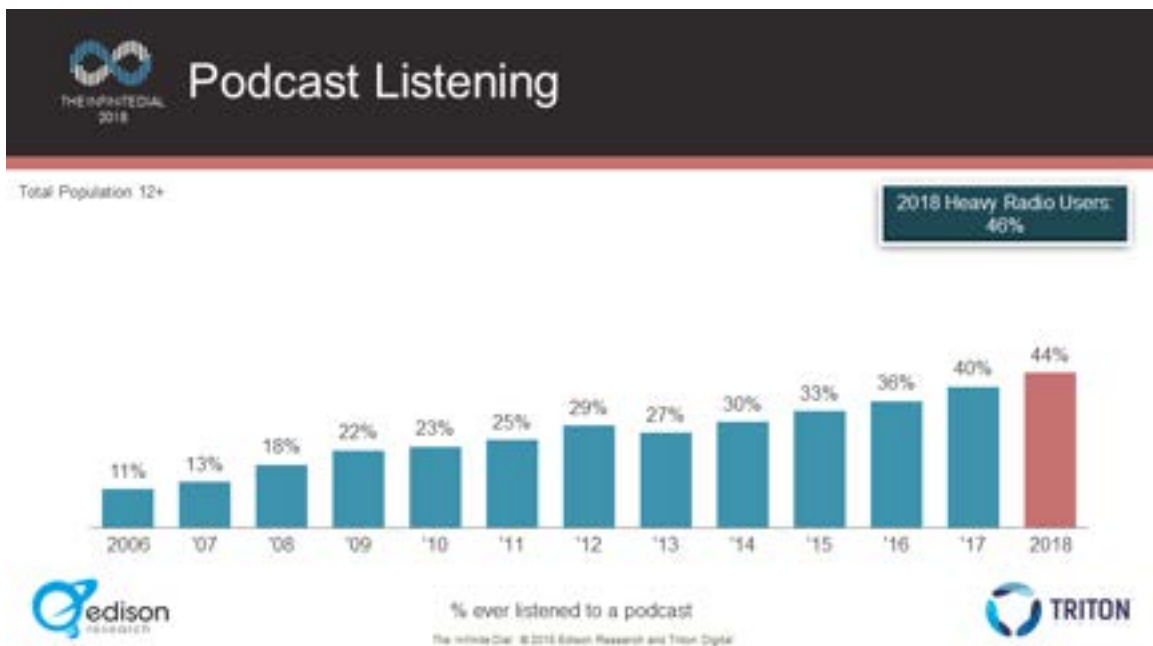
Finally, heavy radio listeners carry that listening to Pandora and iHeart through when we asked which audio brand they use the most. In each case there is a five percentage point increase in usage for these two brands.



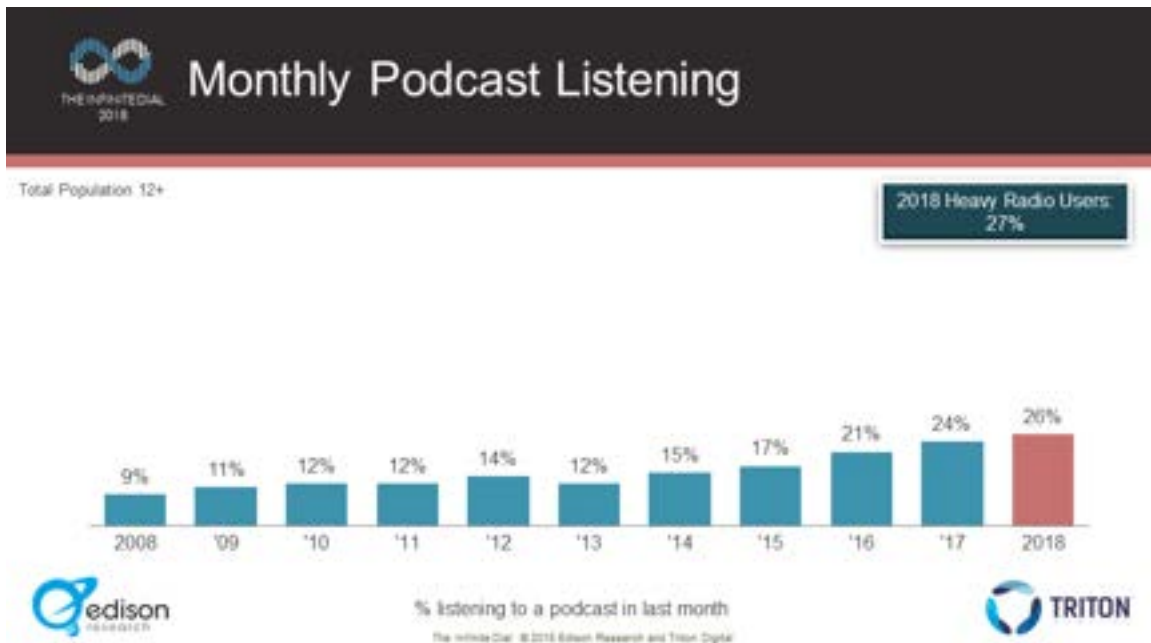
Further, heavy radio listeners are about as likely to listen to music on YouTube in a typical week.



Heavy radio listeners are just a bit more likely to use Facebook than the total population. Fully 64% of heavy radio listeners use this social media platform.



Heavy radio listeners are just a tad more likely to have listened to a podcast than the population overall. There is consistent evidence that while there is overlap between podcasting and 'radio' listening, they are not a perfect overlay.



Listening to a podcast in the last month is essentially the same among heavy radio listeners and the total population.



For weekly listening, the number for the total population and for heavy radio listeners is exactly the same at 17%.

Radio's Heavy Listeners – the 30% of the population that listens for more than one hour per day – have higher incomes and are more likely to be full-time employed than the total population. They make an attractive target for advertisers and underwriters.

Conclusions:

Even among the 30% of Americans who are “Heavy Radio Listeners,” the hardware challenge in homes is significant. Radio can recapture lost in-home time spent with Smart Speakers and other technologies by driving listeners to their streams – getting in-home listening back to analog radios seems unlikely.

Radio’s heavy listeners are also heavier listeners to online radio and to ‘pureplay’ services like Pandora. They are, unsurprisingly, simply ‘heavy audio users’. However, to date they are not more likely to consume podcasts than the public at large.

Podcasting continues its steady growth, with significant gains in the vehicle. To date, public radio has taken far more advantage of this niche than have commercial broadcasters. All speech-based content is going to need to adapt to on-demand, whether it’s reconfiguring over-the-air shows or taking the best podcasts onto the airwaves.

Edison is committed to helping broadcasters by providing the highest-quality research data so you can build your strategies based on solid knowledge of the audio marketplace.



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