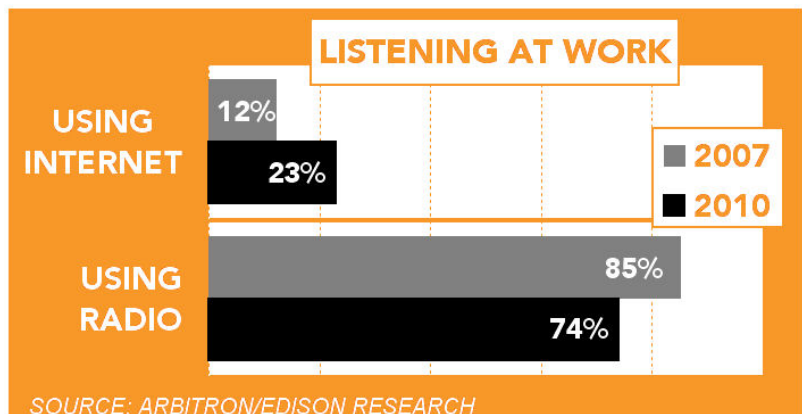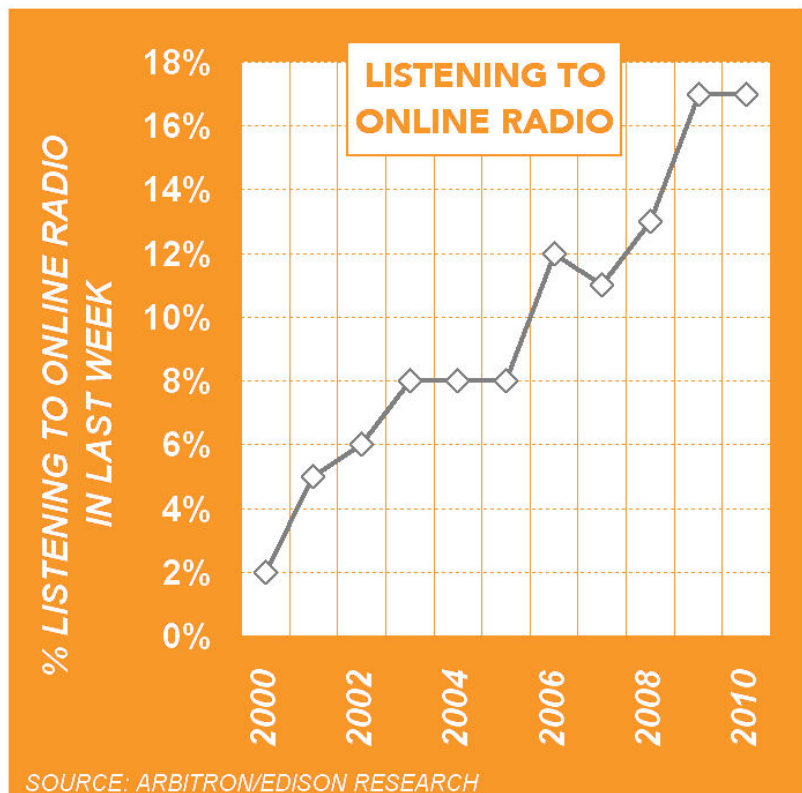**May 24, 2010**

Surveys Track Online, Broadcast Media Usage

Many (if not most) radio broadcast engineers are responsible not only for keeping a station's signal on-the-air, but online as well. According to two recent surveys (discussed below) of online and broadcast media usage, online streaming services are becoming more popular with listeners, and consequently they are likely to continue to play an ever-increasing role in broadcast engineering activities.

One of these surveys was conducted jointly by Arbitron (Columbia, Md, www.arbitron.com) and Edison Research (Somerville, N.J., www.edisonresearch.com), who have been studying the impact that digital platforms are having on radio and other media since 1998. Their 18th study in this series, released in April of this year, is called "The Infinite Dial 2010: Digital Platforms and the Future of Radio." It provides a wealth of information on consumer usage of digital media including some interesting statistics on the use of social networking sites, declaring social networking a "mainstream behavior" and Facebook in particular an "essential platform."

For the Arbitron/Edison Research survey, a total of 1,753 persons in the U.S. were interviewed from January 25 to February 22, 2010. Telephone interviews were conducted with respondents age 12 and older, chosen at random from a national sample of Arbitron's Fall 2009 survey diary keepers and through random digit dialing (RDD) sampling in certain geographic areas where Arbitron diary keepers were not available for the survey. Some of the key findings pertaining to radio and digital platforms include:

● **Listening to online radio** – according to the survey, an estimated 70 million people in the U.S. listened to online radio in the past month. Shown in the graph is the trend for weekly online radio listening since 2000, with 17 percent of people 12 and older having listened in 2010 which represents approximately 43 million. Three in ten 12-to-24 year olds are "very interested" in online radio in the car and on mobile devices.

LISTENING TO ONLINE RADIO

% LISTENING TO ONLINE RADIO IN LAST WEEK

SOURCE: ARBITRON/EDISON RESEARCH

LISTENING AT WORK

USING INTERNET — 12% (2007), 23% (2010)

USING RADIO — 85% (2007), 74% (2010)

SOURCE: ARBITRON/EDISON RESEARCH

- **Listening at work** – nearly one in four (23 percent) of people who listen to the radio at work now do so using the Internet (see graph), which is nearly double from the amount of people who did so in 2007. Other statistics regarding online listeners indicate that they are slightly more likely to be male than female (55 versus 45 percent) and that they are more likely to be "upscale," well-educated and employed than those who do not listen to online radio.

- **Visiting station Web sites** – shown in the figure at right are the reasons that people give for visiting a station's Web site, with "song title and artist" being the most popular. Consumers say radio station Web sites are improved compared to a year ago but TV and print sites are leading the local battle. Monthly visitation by persons 12 and older to radio station Web sites (16 percent of those responding) lags visitation to local TV (27

REASON FOR VISITING STATION WEB SITE

SONG TITLE AND ARTIST	57%
LISTENT TO STATION	55%
INFO ABOUT CONCERTS	54%
WEATHER	53%
LISTINGS OF FUN/INTERESTING PLACES	43%
TRAFFIC	38%
PARTICIPATE IN CONTESTS	38%
PROGRAM SCHEDULE	37%
SCHOOL CLOSING INFO	34%

SOURCE: ARBITRON/EDISON RESEARCH

percent) and local newspaper (also 27 percent) sites. Nearly half of people age 12 and older give credit to radio for improvements in their Web sites. Forty-eight percent say that radio station Web sites have gotten more interesting compared to 17 percent believing them to be worse or less interesting.
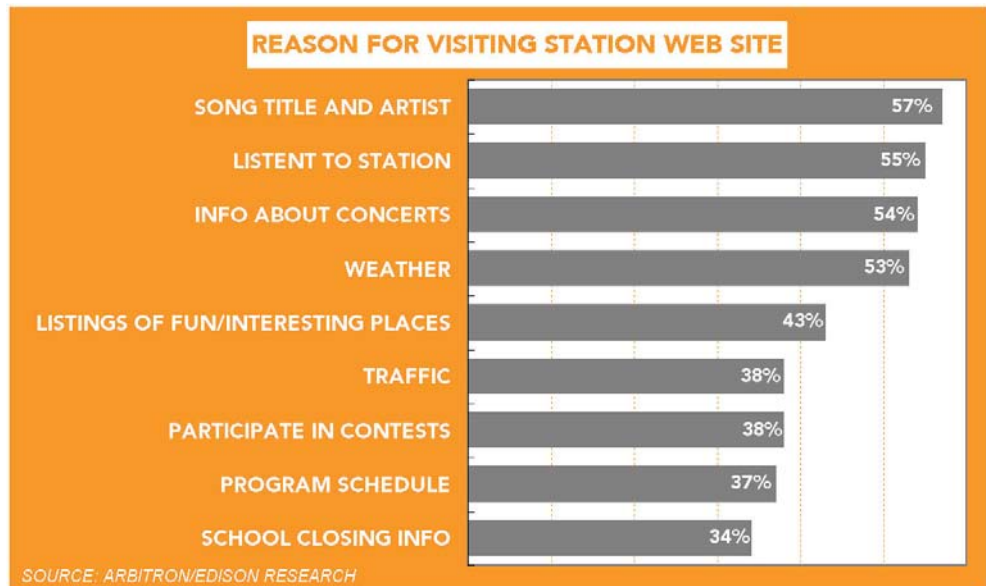
- **Greatest total impact** – the survey asked respondents to indicate which platforms and devices have a "big impact" on their lives, and the resulting data was combined with the percent who use or own those devices and platforms to create a measure of the "greatest total impact" shown in the graph at right.
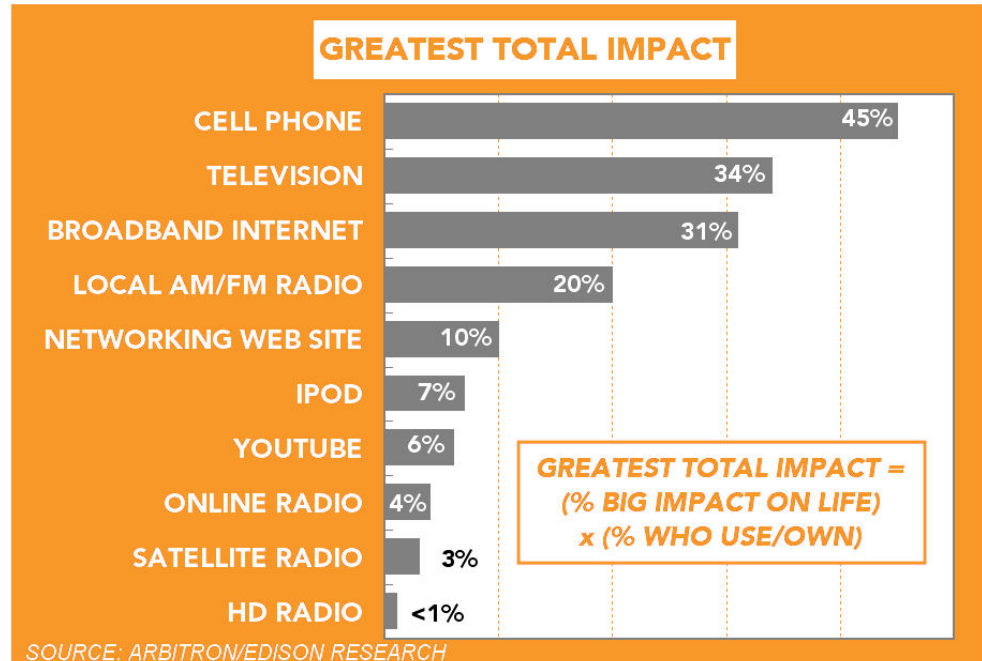
Interactive research and technology firm Vision Critical (New York, NY, www.visioncritical.com) conducted a survey and released the results (also in April 2010) in a report entitled "Radio Futures

GREATEST TOTAL IMPACT

CELL PHONE	45%
TELEVISION	34%
BROADBAND INTERNET	31%
LOCAL AM/FM RADIO	20%
NETWORKING WEB SITE	10%
IPOD	7%
YOUTUBE	6%
ONLINE RADIO	4%
SATELLITE RADIO	3%
HD RADIO	<1%

GREATEST TOTAL IMPACT = (% BIG IMPACT ON LIFE) x (% WHO USE/OWN)

SOURCE: ARBITRON/EDISON RESEARCH

2010." Vision Critical surveyed more than 3,000 adults in the U.S., U.K. and Canada and found that while those in Canada and the U.K. are using applications on their smartphone or iPod Touch to listen to AM/FM radio, U.S. users are more likely to use their apps to listen to Web-only radio and music streaming services. Among adults in the U.S. who have listened to online-only radio in the past month (see graph below), Pandora leads the pack as the favored online music service (42 percent having listened in the past year), followed by Rhapsody (6

percent), last.fm (5 percent) and Yahoo! (5 percent).

At the time of the survey, nearly one-third (31 percent) of U.S. smartphone and iPod Touch users said they've listened to Internet radio or a music streaming service on their device in the past week. In contrast, just 19 percent reported listening to an AM or FM station on the same platform.

According to the Vision Critical study, listeners to Web-based services expressed a clear preference for personalized versus "one-way" broadcast streams. Online consumers who turn to Web-only music or streaming service in the past month showed a particularly active interest in services that offer some degree of control. Fifty-three percent of respondents said that they were "very interested" in streaming where it is possible to play a song on demand, while only 24 percent were very interested in radio that plays music mixes designed by "music experts."

LEADING WEB RADIO/STREAMING SERVICES

Service	
PANDORA	
RHAPSODY	
LAST.FM	
YAHOO MUSIC	
AOL	
ITUNES	
SLACKER	
YOUTUBE	
LIVE365.COM	
PLAYLIST.COM	

■ Listened to in past year
■ Favorite service

0% 5% 10% 15% 20% 25% 30% 35% 40% 45%

SOURCE: VISIONCRITICAL

The full version of the Arbitron/Edison Study is available online from the Arbitron Web page at www.arbitron.com/study/digital_radio_study.asp. Similarly, the Vision Critical report is available at www.visioncritical.com/wp-content/uploads/2010/04/Radio-Futures-2010-Report.pdf.
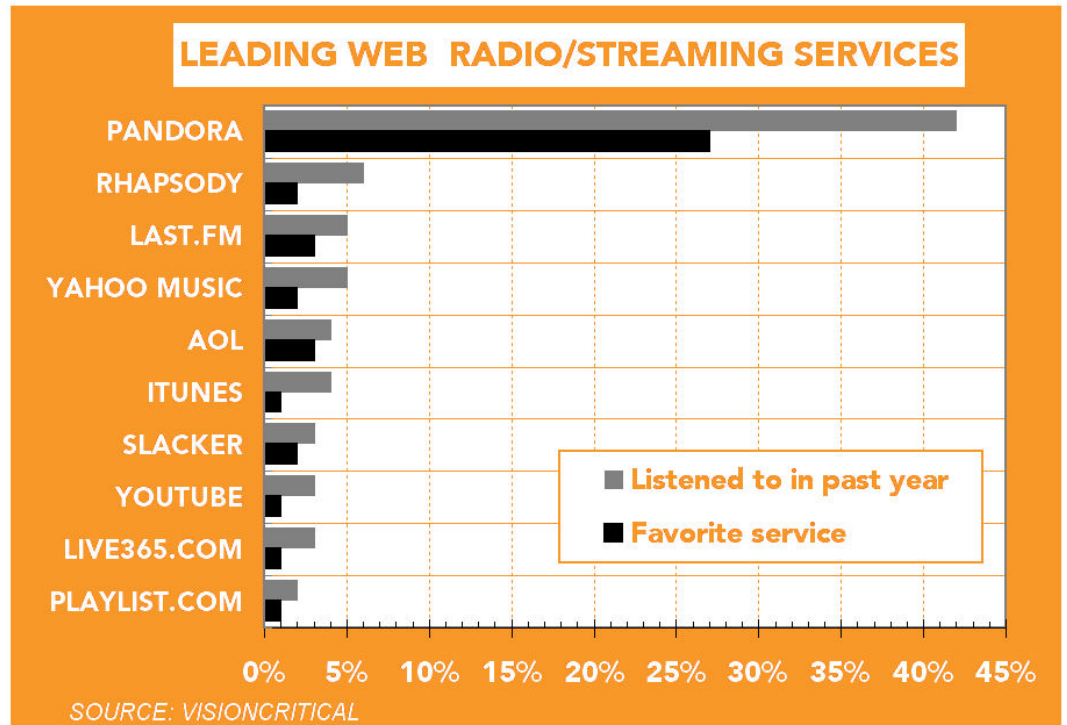
Radio TechCheck will not be published on May 31, but will return June 7, 2010.