The Infinite Dial 2011: Navigating Digital Platforms
Methodology Overview

» In January 2011, Arbitron and Edison Research conducted a national telephone survey (landline and cell phone) of 2,020 people aged 12 and older

» This is the 19th study in our series dating to 1998

» These studies have explored digital platforms and their impact on radio and other media
The Internet and digital platforms are practically ubiquitous
• Nearly 90% of U.S. households have access to the Internet and most via broadband connections
  • Multi-computer households are growing rapidly
  • Two-thirds of homes with Internet access have Wi-Fi network

Social media continues to grow…
• More than half of Americans 12+ now have a Facebook® page
  • Among 35-54s, Facebook use jumps 25% in one year

Smartphone ownership has tripled in two years
Weekly online radio usage crosses the 20% threshold
Ages of heavy radio users closest to population; heavy Internet users skew younger, heavy TV users lean older
Broadband, cell phones, TV and radio have the largest number of passionate users
Digital Platforms

Online

Smartphone

Broadcast

HD Radio

Podcasting
The Digital Platform Landscape in 2001

% of Americans Aged 12 and Older Who Use/Own Platform/Devices

- Television: 98%
- Local AM/FM Radio: 96%
- Cell Phone: 54%
- Broadband Internet: 20%
- Online Radio: 28%
- Online Video: 23%
- Video on Demand: 20%

Source: TV HHs; Weekly AM/FM radio audience; Own a cell phone; Have broadband access at home; Ever use online radio; Ever use online video and Video on Demand
% of Americans Aged 12 and Older Who Use/Own Platform/Devices

- Pandora: 24%
- MP3 player (Other Than iPod): 23%
- Video Podcasts: 22%
- Hulu: 20%
- MySpace: 17%
- Android Smartphone: 13%
- Satellite Radio: 12%
- BlackBerry: 11%
- iPhone: 9%
- LinkedIn: 9%
- Twitter: 8%
- E-Readers: 7%
- iPad: 4%
- Location-Based Services: 4%

Source: Ever use Pandora®; Own MP3 player (other than iPod); Ever use video podcast; Ever use Hulu®; Ever use MySpace®; Own Android™ smartphone; Subscribe to satellite radio: Own BlackBerry®; Own iPhone®; Ever use LinkedIn; Ever use Twitter®; Own e-reader; Own iPad®; Ever use location-based services
Internet Access and Digital Household Trends
Internet Access Is Nearly Ubiquitous

% With Internet Access From Any Location

<table>
<thead>
<tr>
<th>Year</th>
<th>Access Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>88%</td>
</tr>
<tr>
<td>2010</td>
<td>84%</td>
</tr>
<tr>
<td>2009</td>
<td>85%</td>
</tr>
<tr>
<td>2008</td>
<td>82%</td>
</tr>
<tr>
<td>2007</td>
<td>83%</td>
</tr>
<tr>
<td>2006</td>
<td>81%</td>
</tr>
<tr>
<td>2005</td>
<td>81%</td>
</tr>
<tr>
<td>2004</td>
<td>79%</td>
</tr>
<tr>
<td>2003</td>
<td>75%</td>
</tr>
<tr>
<td>2002</td>
<td>72%</td>
</tr>
<tr>
<td>2001</td>
<td>62%</td>
</tr>
<tr>
<td>2000</td>
<td>55%</td>
</tr>
<tr>
<td>1999</td>
<td>50%</td>
</tr>
</tbody>
</table>

Base: Total Population 12+
Most Homes With Internet Access Have High-Speed Broadband Connections

% Who Have Broadband/Dial-Up Internet Access at Home

<table>
<thead>
<tr>
<th>Year</th>
<th>Dial-Up</th>
<th>Broadband</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>78%</td>
<td>21%</td>
</tr>
<tr>
<td>2003</td>
<td>68%</td>
<td>28%</td>
</tr>
<tr>
<td>2004</td>
<td>60%</td>
<td>37%</td>
</tr>
<tr>
<td>2005</td>
<td>48%</td>
<td>48%</td>
</tr>
<tr>
<td>2006</td>
<td>38%</td>
<td>58%</td>
</tr>
<tr>
<td>2007</td>
<td>28%</td>
<td>69%</td>
</tr>
<tr>
<td>2008</td>
<td>20%</td>
<td>76%</td>
</tr>
<tr>
<td>2009</td>
<td>15%</td>
<td>82%</td>
</tr>
<tr>
<td>2010</td>
<td>13%</td>
<td>84%</td>
</tr>
<tr>
<td>2011</td>
<td>8%</td>
<td>86%</td>
</tr>
</tbody>
</table>

Base: Access the Internet From Home
Nearly Half of Consumers Now Say the Internet Is Most Essential to Their Lives

% Saying the Internet Is the Most Essential Medium to Their Lives

- 2002: 20%
- 2007: 33%
- 2011: 45%

Base: Total Population 12+

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12-34s Far More Likely to Say the Internet Is Most Essential to Their Lives

% by Age Group Saying the Internet Is the Most Essential Medium to Their Lives

- Persons 12-34: 62%
- Persons 35+: 34%
More than Half of Households Now Have Two or More Working Computers

% With Two or More Working Computers in Household

Base: Total Population 12+

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Two-Thirds of Homes With Internet Access Have a Wi-Fi Network

% of Homes With Internet Access That Have a Wi-Fi Network Setup

Have Wi-Fi 65%
Do Not Have Wi-Fi 35%

Base: Access the Internet From Home
Online Radio

Online Smartphone Broadcast HD Radio Podcasting
An Estimated 89 Million Americans Listened to Online Radio in the Last Month

Approximately 89 Million

% Who Have Listened to Online Radio (AM/FM Streams or Internet-Only Streams)

Ever

56%

Last Month

34%

Base: Total Population 12+
AM/FM Streams, Internet-Only Streams Each Listened to by More Than 20% in the Last Month

% Who Listened to Given Source of Online Radio in the Last Month

22% Listened to AM/FM Streams in the Last Month

21% Listened to Internet-Only Streams in the Last Month

Base: Total Population 12+
One in 10 Listened to **Both** AM/FM Streams AND Internet-Only Sources in the Last Month

% Who Listened to Given Source of Online Radio in the Last Month

- 34% Listened to Online Radio in the Last Month
- 12% Listened Exclusively to AM/FM Streams in the Last Month
- 9% Listened to Both AM/FM Streams AND Internet-Only Sources
- 13% Listened Exclusively to Internet-Only Streams in the Last Month

Base: Total Population 12+
More Monthly Online Listeners Say They Listen Most to Internet-Only Audio vs. Five Years Ago

% of Monthly Online Radio Listeners Who Listen to Both AM/FM Streams and Internet-Only Audio Who Listen Most to…

Base: Monthly Listeners to Both Online Streams of AM/FM Radio Stations AND Internet-Only Audio
Weekly Online Radio Audience Has Doubled Every Five Years Since 2001

% Who Have Listened to Online Radio in Last Week

<table>
<thead>
<tr>
<th>Year</th>
<th>%</th>
<th>Base: Total Population 12+</th>
<th>Approximately 57 Million</th>
</tr>
</thead>
<tbody>
<tr>
<td>2001</td>
<td>5%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td>12%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td>22%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Time Spent With Online Radio Increased 49% Among Weekly Listeners in the Last Three Years

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

- 2008: 6:13
- 2009: 6:31
- 2010: 8:02
- 2011: 9:47

Base: Weekly Online Radio Listeners
Online Radio Listening Is a Complement to Over-the-Air Radio, Not a Substitute

% of Weekly Online Radio Listeners Who Listened to Over-the-Air AM/FM Radio in the Past Week vs. Those Who Did Not

- Listened to Over-the-Air AM/FM Radio: 89%
- Listened Exclusively to Online Radio: 11%

Base: Weekly Online Radio Listeners
Nearly Half of Americans Have Heard of Pandora

“Have you ever heard of the Internet radio service called Pandora?”

- Have Heard of Pandora: 47%
- Have Not Heard of Pandora: 53%

Base: Total Population 12+
One in Four Have Ever Listened to Pandora: 10% Have Listened in the Past Week

% Listened to Pandora...

- Ever: 24%
- Last Month: 16%
- Last Week: 10%

Base: Total Population 12+
Weekly Pandora Usage Highest Among 18-34s

% by Age Group Who Have Listened to Pandora in Last Week

- 12-17: 8%
- 18-24: 16%
- 25-34: 23%
- 35-44: 10%
- 45-54: 7%
- 55-64: 6%
- 65+: 1%
Personalized Content, Skipping Songs and Ease of Use Top Reasons Pandora Users Listen

% Who “Agree Strongly” This Is a Reason They Listen to Pandora

- You like the ability to create radio stations based on your favorite songs or artists: 77%
- You like the ability to skip songs: 74%
- Pandora is easy to use: 71%
- Pandora has fewer commercials than AM/FM radio: 62%
- Pandora seems to play a wider selection of songs than AM/FM radio stations: 60%
- Pandora learns about your personal music tastes and continues to adapt the music it selects: 57%
- Pandora has no personalities or DJs: 49%
- Pandora would be better if it had personalities or DJs who talk about the music: 9%

Base: Ever Listen to Pandora
Significant Rise in Those Who Use Their Cell Phone to Listen to Online Radio in Their Cars

% 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

Base: Own a Cell Phone
One in Five Who Listen to Radio While Working Tune In Most Often on Their Computers

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

- Radio Stations on Your Computer Over Internet: 21%
- Radio Stations on a Regular Radio: 77%
- Don't Know: 2%

Base: Employed Full-Time or Part-Time and Listen to the Radio While Working (24% of Total 12+ Population)
Online Video

Online
Smartphone
Broadcast
HD Radio
Podcasting
Weekly Audience for Online Video Has Tripled in the Past Five Years

% Who Have Watched Online Video in Last Week

2006: 12%
2011: 38%

Base: Total Population 12+
Time Spent per User With Online Radio Is Almost Triple Time Spent With Online Video

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Online Radio</th>
<th>Online Video</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>6:13</td>
<td>2:20</td>
</tr>
<tr>
<td>2009</td>
<td>6:31</td>
<td>2:20</td>
</tr>
<tr>
<td>2010</td>
<td>8:02</td>
<td>2:53</td>
</tr>
<tr>
<td>2011</td>
<td>9:47</td>
<td>3:26</td>
</tr>
</tbody>
</table>

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YouTube Growth Continues

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

Base: Total Population 12+
Digital Audio Players

Online
Smartphone
Broadcast
HD Radio
Podcasting
Half Now Own an iPod/iPad/iPhone or Other Portable MP3 Player

% Who Own…

- Non-iPod Player only
- Both*
- iPod only*

Base: Total Population 12+

* 2008-2011 includes iPhone and 2011 includes iPad
Three in 10 Listen to Digital Audio in Cars: 1 in 16 Do So Nearly Every Day

“How often do you listen to digital audio files in a car by connecting an iPod or other MP3 player to a car stereo?”

- **Own Digital Audio Player: HAVE Listened by Connecting in a Car**
  - Nearly Every Day: 6%
  - Once/a Few Times a Week: 10%
  - A Few Times per Month or Less: 15%

- **Do NOT Own MP3/Digital Audio Player**: 51%

Base: Total Population 12+
Mobile/Smartphones

Online Smartphone Broadcast HD Radio Podcasting
Smartphone Ownership Has Tripled Since 2009

% Who Have a Smartphone

- 2009: 10%
- 2010: 14%
- 2011: 31%

Base: Total Population 12+
Nearly Half of 18-34s Have Smartphones

% by Age Group Who Own a Smartphone

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Ownership Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>12-17</td>
<td>33%</td>
</tr>
<tr>
<td>18-24</td>
<td>45%</td>
</tr>
<tr>
<td>25-34</td>
<td>50%</td>
</tr>
<tr>
<td>35-44</td>
<td>39%</td>
</tr>
<tr>
<td>45-54</td>
<td>26%</td>
</tr>
<tr>
<td>55-64</td>
<td>19%</td>
</tr>
<tr>
<td>65+</td>
<td>6%</td>
</tr>
</tbody>
</table>
Smartphone Owners Use Mobile Phone Functions More Frequently

% Who (Item) on a (Cell Phone/Smartphone) Several Times per Day or More

- Make calls or receive calls: Smartphone Users 87%, All Cell Phone Users 70%
- Send or receive text messages: Smartphone Users 76%, All Cell Phone Users 53%
- Browse the Internet: Smartphone Users 40%, All Cell Phone Users 18%
- Use social networking sites such as Facebook or Twitter: Smartphone Users 27%, All Cell Phone Users 12%
- Listen to music you have transferred or downloaded to the phone: Smartphone Users 19%, All Cell Phone Users 9%
- Play games: Smartphone Users 14%, All Cell Phone Users 6%
- Listen to Pandora: Smartphone Users 8%, All Cell Phone Users 3%
- Listen to the stream of any FM or AM radio stations: Smartphone Users 5%, All Cell Phone Users 3%
- Purchase an app: Smartphone Users 3%, All Cell Phone Users 2%
- Watch video: Smartphone Users 8%, All Cell Phone Users 1%

Base: Own a Cell Phone/Smartphone
Nearly Six in 10 Smartphone Owners Would Give Up TV Before Giving Up Their Smartphones

“Suppose you could never watch television again OR you could never use your Apple iPhone/Smartphone again. Which would you be more willing to eliminate from your life?”

**Eliminate iPhone or TV**
- Eliminate TV (Keep iPhone): 58%
- Eliminate iPhone (Keep TV): 36%
- Don’t Know: 6%

**Eliminate Non-iPhone Smartphone or TV**
- Eliminate TV (Keep Non-iPhone Smartphone): 58%
- Eliminate Non-iPhone Smartphone (Keep TV): 41%
- Don’t Know: 2%

*Base: Own Apple iPhone*
Podcasting
Awareness of Audio Podcasting Has Leveled Off

% Aware of Audio Podcasts

- 2006: 22%
- 2007: 37%
- 2008: 37%
- 2009: 43%
- 2010: 45%
- 2011: 45%

Base: Total Population 12+
One in Four Americans Have Ever Listened to an Audio Podcast

% Who Have Ever Listened to an Audio Podcast

Base: Total Population 12+

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An Estimated 31 Million Americans Have Listened to a Podcast in the Past Month

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

Approximately 31 Million

Base: Total Population 12+
Social Networking
More Than Half of Americans Have a Profile on a Social Networking Site

% Who Currently Have a Personal Profile Page on Facebook, MySpace®, LinkedIn or Any Other Social Networking Web Site

- 2008: 24%
- 2009: 34%
- 2010: 48%
- 2011: 52%

Base: Total Population 12+
Facebook Is the Dominant Player in Social Networking

% Using Each Social Networking Site/Service

Facebook (Have personal profile) 51%

MySpace (Have personal profile) 17%

LinkedIn (Have personal profile) 9%

Twitter (Ever use) 8%

Base: Total Population 12+
Year-Over-Year Growth in Social Networking Greatest Among People Aged 35 to 54

% by Age Group Who Currently Have a Personal Profile Page on Facebook, MySpace, LinkedIn or Any Other Social Networking Web Site
Frequent Usage of Social Networking Sites Increases Fourfold in Three Years

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

- 2008: 5% (Approx. 12 Million)
- 2009: 7% (Approx. 18 Million)
- 2010: 15% (Approx. 39 Million)
- 2011: 18% (Approx. 46 Million)

Base: Total Population 12+
Those Accessing Social Networking on Mobile Phones Jumps 34% Year Over Year

% Who Ever Access Social Networking Sites or Services Using a Cell Phone

- 2010: 32%
- 2011: 43%

Base: Use Social Networking Web Sites or Services
One in Four Social Network Users Follow Companies or Brands on Social Sites

“Do you follow any companies or brands on any social networking sites?”

- Follow Any Companies or Brands on Social Networking Sites: 25%
- Do NOT Follow Any Companies or Brands on Social Networking Sites: 75%

Base: Use Social Networking Web sites or Services
AM/FM Radio
More than Half of Persons 12+ Aware of HD Radio®: Awareness Among Men Greater Than Women

% by Age Group Who Have Ever Heard of HD Radio

- Persons 12+: 51%
- Men 18+: 58%
- Women 18+: 43%
- 12-17: 53%
- 18-24: 61%
- 25-34: 59%
- 35-44: 56%
- 45-54: 52%
- 55-64: 48%
- 65+: 27%
Radio Remains the Leader for Learning About New Music, but the Internet Is Gaining

“Among Internet, television, radio and newspapers, which do you turn to first to learn about new music?”

<table>
<thead>
<tr>
<th></th>
<th>2007</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet</td>
<td>25%</td>
<td>32%</td>
</tr>
<tr>
<td>Television</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Radio</td>
<td>48%</td>
<td>39%</td>
</tr>
<tr>
<td>Newspapers</td>
<td>4%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Base: Total Population 12+
12-34s Turn to the Internet First for Music Discovery, While Radio Leads Among P35+

% Choosing Internet/Radio as Medium They Turn to First to Learn About New Music

<table>
<thead>
<tr>
<th></th>
<th>Radio</th>
<th>Internet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Persons 12-34</td>
<td>35%</td>
<td>53%</td>
</tr>
<tr>
<td>Persons 35+</td>
<td>42%</td>
<td>19%</td>
</tr>
</tbody>
</table>
Digital Audio Users Spend As Much Time With Radio As the Average (Not Less)

Index of Self-Reported Time Spent Listening to Radio per Day

<table>
<thead>
<tr>
<th>Weekly Online Radio Listeners</th>
<th>Own iPod/Other MP3 Player</th>
<th>Listen to Digital Audio in Car at Least Once a Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>106</td>
<td>105</td>
<td>101</td>
</tr>
<tr>
<td>94</td>
<td>103</td>
<td>103</td>
</tr>
<tr>
<td>100</td>
<td>102</td>
<td>93</td>
</tr>
</tbody>
</table>

- **Persons 12+**
- **Persons 12-24**
- **Persons 25-54**
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 = 36

Heavy Radio Users
Median Age = 41

Heavy TV Users
Median Age = 48
Heavy Usage of One Medium Is NOT Necessarily Associated With Less Time With Other Media

Self-Reported Average Time Spent per Day With Each Medium (Hours:Minutes)

- **Persons 12+**
  - Internet: 2:22
  - TV: 3:43
  - Radio: 2:06

- **Heavy Radio Users**
  - Internet: 3:45
  - TV: 6:29
  - Radio: 2:47

- **Heavy TV Users**
  - Internet: 8:34
  - TV: 1:55
  - Radio: 2:36

- **Heavy Internet Users**
  - Internet: 6:50
  - TV: 3:55
  - Radio: 2:11
75% 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

- 75% for Persons 12+
- 89% for Heavy Radio Users
- 75% for Heavy TV Users
- 74% for Heavy Internet Users
Heavy Users of Radio and Internet More Likely to Be Employed Full-Time

% Employed Full-Time

- Persons 12+: 42%
- Heavy Radio Users: 47%
- Heavy TV Users: 31%
- Heavy Internet Users: 49%
Digital Platforms/Devices

Online
Smartphone
Broadcast
HD Radio
Podcasting
Television, AM/FM Radio and Cell Phones Have Most Widespread Usage

% of Americans Aged 12 and Older Who Use/Own Platform/Device

- Television: 98%
- Local AM/FM Radio: 93%
- Cell Phone: 84%
- Broadband Internet: 70%
- Online Radio: 56%
- Online Video: 54%
- Facebook: 51%
- YouTube: 49%
- Digital Video Recorder: 36%
- Video on Demand: 35%
- iPod: 31%
- Smartphone: 31%
- Audio Podcasts: 25%

Source: TV HHs; Weekly AM/FM radio audience; Own a cell phone; Have broadband access at home; Ever use online radio; Ever use online video; Have a Facebook profile; Ever use YouTube; Own a DVR; Ever use Video on Demand; Own iPod; Own smartphone; Ever use audio podcast
% of Americans Aged 12 and Older Who Use/Own Platform/Device (cont’d)

- Pandora: 24%
- MP3 player (Other Than iPod): 23%
- Video Podcasts: 22%
- Hulu: 20%
- MySpace: 17%
- Android smartphone: 13%
- Satellite Radio: 12%
- BlackBerry: 11%
- iPhone: 9%
- LinkedIn: 9%
- Twitter: 8%
- E-Readers: 7%
- iPad: 4%
- Location-based services: 4%

Source: Ever use Pandora; Own MP3 player (other than iPod); Ever use Video podcast; Ever use Hulu; Own Android smartphone; Subscribe to satellite radio; Own BlackBerry; Own iPhone; Ever use LinkedIn; Ever use Twitter; Own e-reader; Own iPad; Ever use location-based services
Combined Time Spent per Day With Radio, TV and Internet Gained 20% Since 2001

Self-Reported Average Time Spent per Day With Radio, TV and Internet (Hours:Minutes)

- 2001: 6:50
- 2006: 7:46
- 2011: 8:11

Base: Total Population 12+
iPhone, iPod and iPad Have the Highest “Likeability” Among Their Users

% Who “Like” or “Love” Platform/Device

- iPhone: 85%
- iPod: 84%
- iPad: 83%
- Broadband: 80%
- E-reader: 78%
- Digital Video Recorder: 76%
- Satellite Radio: 75%
- Pandora: 75%
- Television: 73%
- Android Smartphone: 73%
- Local AM/FM radio: 69%
- BlackBerry: 69%
- YouTube: 68%

“Overall, how much do you enjoy (platform/device)?”
(“5” = “Love It”; “1” = “Hate It”)

Base: Use Platform/Device
MySpace, Video Podcasts and LinkedIn Have the Lowest “Likeability” Among Their Users

% Who “Like” or “Love” Platform/Device (cont’d)

<table>
<thead>
<tr>
<th>Platform/Device</th>
<th>% Who Like/Love</th>
</tr>
</thead>
<tbody>
<tr>
<td>DVDs</td>
<td>67%</td>
</tr>
<tr>
<td>Facebook</td>
<td>66%</td>
</tr>
<tr>
<td>Watching Video on Demand</td>
<td>66%</td>
</tr>
<tr>
<td>Using an MP3 Audio Player (not iPod)</td>
<td>63%</td>
</tr>
<tr>
<td>Hulu</td>
<td>62%</td>
</tr>
<tr>
<td>Online Video</td>
<td>62%</td>
</tr>
<tr>
<td>Cell Phone</td>
<td>59%</td>
</tr>
<tr>
<td>Online Radio</td>
<td>53%</td>
</tr>
<tr>
<td>Location-Based Services</td>
<td>44%</td>
</tr>
<tr>
<td>Twitter</td>
<td>42%</td>
</tr>
<tr>
<td>Audio Podcasts</td>
<td>41%</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>37%</td>
</tr>
<tr>
<td>Video Podcasts</td>
<td>36%</td>
</tr>
<tr>
<td>MySpace</td>
<td>23%</td>
</tr>
</tbody>
</table>

“Overall, how much do you enjoy (platform/device)?”
(“5” = “Love It”; “1” = “Hate It”)

Base: Use Platform/Device
Apple Users Exhibit the Most Passion

% Who “Love” Platform/Device

Base: Use Platform/Device
# MySpace, Video Podcast and LinkedIn Users Have the Least Passion

## % Who “Love” Platform/Device (cont’d)

<table>
<thead>
<tr>
<th>Platform/Device</th>
<th>% Love</th>
</tr>
</thead>
<tbody>
<tr>
<td>YouTube</td>
<td>24%</td>
</tr>
<tr>
<td>MP3 player (Other Than iPod)</td>
<td>23%</td>
</tr>
<tr>
<td>Video on Demand Programming</td>
<td>23%</td>
</tr>
<tr>
<td>Local AM/FM Radio</td>
<td>22%</td>
</tr>
<tr>
<td>Hulu</td>
<td>19%</td>
</tr>
<tr>
<td>Online Video</td>
<td>18%</td>
</tr>
<tr>
<td>Twitter</td>
<td>18%</td>
</tr>
<tr>
<td>Online Radio</td>
<td>14%</td>
</tr>
<tr>
<td>Location-Based Services</td>
<td>14%</td>
</tr>
<tr>
<td>Audio Podcasts</td>
<td>9%</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>7%</td>
</tr>
<tr>
<td>Video Podcasts</td>
<td>7%</td>
</tr>
<tr>
<td>MySpace</td>
<td>7%</td>
</tr>
</tbody>
</table>

*“Overall, how much do you enjoy (platform/device)?” (5 = “Love It”; 1 = “Hate It)”*

**Base:** Use Platform/Device
Number of Passionate Users: Digital Platforms/Devices

(Percent of Users) x (Percent Who “Love it”)

= 

Number of Passionate Users
Broadband, Cell Phones, TV And Radio Have the Highest Number of Passionate Users

Passionate Users = (% Who Use/Own) x (% “Love”)

- Broadband Internet: 32%
- Cell Phone: 27%
- Television: 26%
- Local AM/FM Radio: 20%
- Digital Video Recorder: 17%
- iPod: 14%
- Facebook: 14%
- YouTube: 12%
- MP3 Player (Other Than iPod): 10%
- Online Video: 10%
- Video on Demand Programming: 8%
- Online Radio: 8%
- Pandora: 8%
Twitter, MySpace, Location-Based Services and LinkedIn Have Few Passionate Users

Passionate Users = (% Who Use/Own) x (% “Love”) cont’d

Android Smartphone 6%
iPhone 6%
Satellite Radio 5%
BlackBerry 4%
Hulu 4%
E-Readers 3%
Audio Podcasts 2%
iPad 2%
Video Podcasts 2%
Twitter 1%
MySpace 1%
Location-Based Services 1%
LinkedIn 1%
Implications
Implication # 1

Homes are fully digital and fully networked
Implication # 2

Online Radio is on a roll
Implication # 3

Consumers show interest in in-car online radio
Implication # 4

Pandora is changing consumer expectations of online radio
Implication # 5

Growth in smartphones requires a re-evaluation of customer relationships
Implication # 6

Facebook is on a trajectory to become a mainstream media platform
Implication # 7

Social media proficiency should become a primary skill set
Implication # 8

Digital platforms are helping Americans consume more of all forms of media
Implication # 9

Radio is relevant and resilient