What we did:

• Edison has been performing the “Infinite Dial” research series since 1998
• High quality telephone survey projectable to the US Population
• These studies provide estimates of digital platforms and their impact on the media landscape based on self-reported consumer behaviors and attitudes
• This year, at the suggestion of Bill Lueth, we added the following question:
  • “Have you listened to any Classical music — either from an AM or FM radio station, an online radio station or from your own CDs or downloaded MP3s — for more than one hour in the last month?”
A rather astonishing, at least to me, 30% of respondents said ‘yes’

“Have you listened to any Classical music – either from an AM or FM radio station, an online radio station or from your own CDs or downloaded MP3s – for more than one hour in the last month?”
Among Public Radio Station P1s, more than three-fifths reported Classical listening

“Have you listened to any Classical music – either from an AM or FM radio station, an online radio station or from your own CDs or downloaded MP3s – for more than one hour in the last month?”

Base: Public Radio Format P1s
Who are Classical Music Listeners?

“Have you listened to any Classical music – either from an AM or FM radio station, an online radio station or from your own CDs or downloaded MP3s – for more than one hour in the last month?”

- Age 25-34: 20%
- Age 35-44: 15%
- Age 45-54: 19%
- Age 55-64: 21%
- Age 65+: 25%

Men: 50%
Women: 50%
Who are Classical Music Listeners?

“Have you listened to any Classical music – either from an AM or FM radio station, an online radio station or from your own CDs or downloaded MP3s – for more than one hour in the last month?”

Total Population

White/Other 74%
Hispanic 15%
African-American 11%

Classical Music Listeners

White/Other 76%
Hispanic 15%
African-American 9%
One of radio’s biggest challenges: The modern bedroom

“In your bedroom, do you have a…?”

- Television: 69% (25+) vs 64% (Classical Music Listeners)
- Radio: 52% (25+) vs 51% (Classical Music Listeners)
- Desktop/Laptop computer: 30% (25+) vs 33% (Classical Music Listeners)
Classical listeners are in-line with the US Population for Smartphone ownership

% Who Own a Smartphone

61% - Total Population

59% - Classical Music Listeners
Classic Listeners are exactly as likely to listen to Online Radio as the total population.

% Listened to Online Radio in **Last Month**

- **Total Population**: 47%
- **Classical Music Listeners**: 47%

**Online Radio** = Listening to AM/FM radio stations online and/or listening to streamed audio content available only on the Internet.
Likely from being heavy users of Public Media, Classical fans are much more familiar with Podcasting

% Familiar with Podcasting

Total Population: 47%

Classical Music Listeners: 60%
And Classical fans are much more likely to have listened to a podcast

% Who Have Ever Listened to an Audio Podcast

- Total Population: 28%
- Classical Music Listeners: 36%
By comparison to the 25+ population, Classical Fans are more likely to use Social Media

% Using Each Social Networking Site/Service

- Have personal profile on **Facebook**: 57% (53% for 25+)
- Have personal profile on **LinkedIn**: 30% (22% for 25+)
- Have personal profile on **Google+**: 18% (13% for 25+)
- Have personal account on **Instagram**: 16% (15% for 25+)
- Ever use **Vine**: 17% (14% for 25+)
- Ever use **Twitter**: 14% (11% for 25+)
- Ever use **Tumblr**: 10% (6% for 25+)
- Ever use **Snapchat**: 4% (3% for 25+)
This was interesting – Classical Listeners more likely to have shared a song

% Who Have Ever Used a Social Networking Site/Service to Share a Song or Music Station They Have Listened to with Friends or Followers

<table>
<thead>
<tr>
<th>Base: Have Profile on Social Network or Service</th>
</tr>
</thead>
</table>

- 25+ age group: 30%
- Classical Music Listeners: 34%
At-work listening is an enormous opportunity for Classical

% Who Currently Ever Listen to the Radio While Working

Base: Employed Full or Part-time
Nearly half of Classical music listeners who listen to radio at work use streams

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

Classical Music Listeners who listen to radio at-work

- On a regular radio: 54%
- On your computer over the Internet: 28%
- On a mobile device such as a smartphone: 18%
In every case, Classical Music listeners are more aware of Internet-audio brands.

<table>
<thead>
<tr>
<th>Internet Audio Brand</th>
<th>Adults 25+</th>
<th>Classical Music Listeners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pandora</td>
<td>65%</td>
<td>75%</td>
</tr>
<tr>
<td>iTunes Radio</td>
<td>44%</td>
<td>50%</td>
</tr>
<tr>
<td>iHeartRadio</td>
<td>42%</td>
<td>43%</td>
</tr>
<tr>
<td>Rhapsody</td>
<td>36%</td>
<td>41%</td>
</tr>
<tr>
<td>Spotify</td>
<td>22%</td>
<td>22%</td>
</tr>
<tr>
<td>Google Play All Access</td>
<td>22%</td>
<td>30%</td>
</tr>
<tr>
<td>Radio.com</td>
<td>15%</td>
<td>18%</td>
</tr>
<tr>
<td>Slacker</td>
<td>13%</td>
<td>17%</td>
</tr>
<tr>
<td>TuneIn Radio</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Last.fm</td>
<td>6%</td>
<td>9%</td>
</tr>
<tr>
<td>Songza</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Rdio</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Stitcher</td>
<td>3%</td>
<td>4%</td>
</tr>
</tbody>
</table>
Classical Listeners are using Online Audio services

% Who Listened in Last Month to...

- Pandora: 29% Classical, 24% Adults 25+
- iTunes Radio: 7% Classical, 6% Adults 25+
- iHeartRadio: 8% Classical, 8% Adults 25+
- Rhapsody: 2% Classical, 1% Adults 25+
- Spotify: 5% Classical, 3% Adults 25+
- Google Play All Access: 4% Classical, 2% Adults 25+
- Radio.com: 1% Classical, 1% Adults 25+
- Slacker: 3% Classical, 1% Adults 25+

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As we said yesterday, the last bastion is now under attack

% 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 Audio System

Base: Own a Cell Phone

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

- Astonishingly – there is still no branded option for Classical Music discovery
- Pandora gets it by default
- And Pandora is stealing your listeners every day
- Why aren’t you ganging together to build THE Classical streaming app? Not station apps – a single app that you brand together
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Contact:  lrosin@edisonresearch.com

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