

Evangelical Christians on The Infinite Dial



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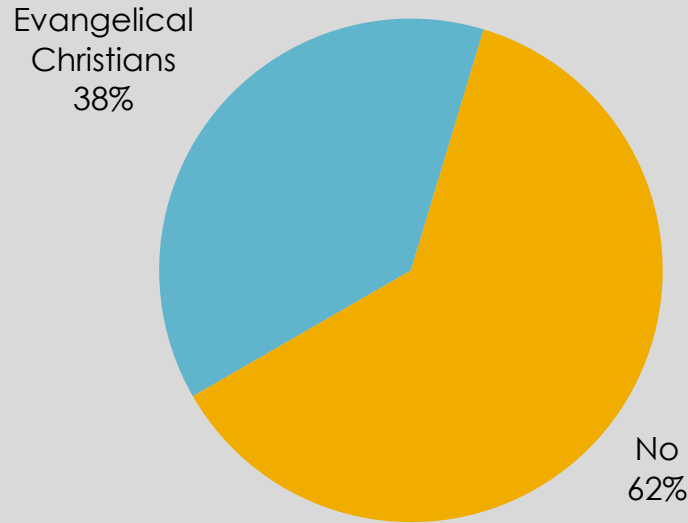


Methodology Overview

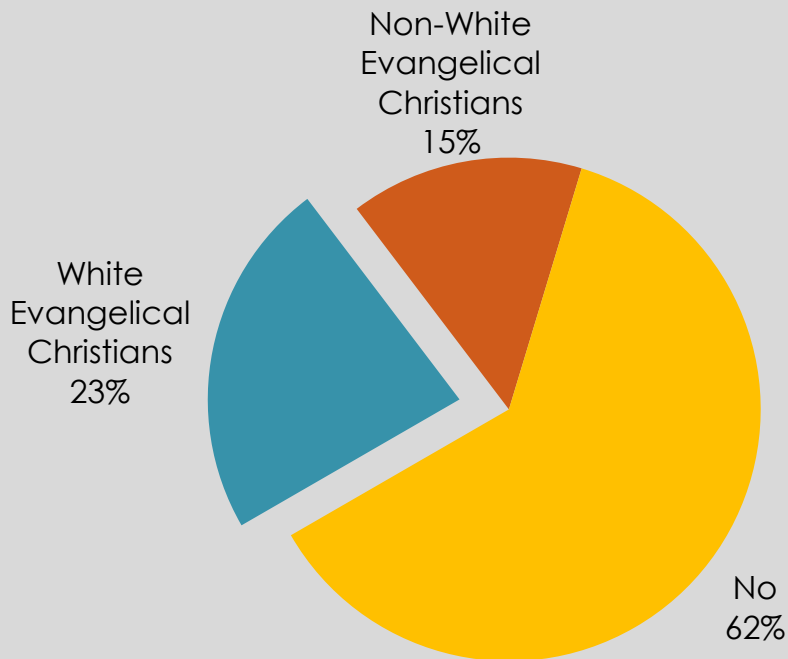
- In January/February 2014, Edison Research conducted a national telephone survey of 2,023 people aged 12 and older, using random digit dialing techniques.
- This is the 22nd study in the series dating to 1998.
- This presentation focuses on the 528 white Evangelical Christians surveyed in the Infinite Dial Study



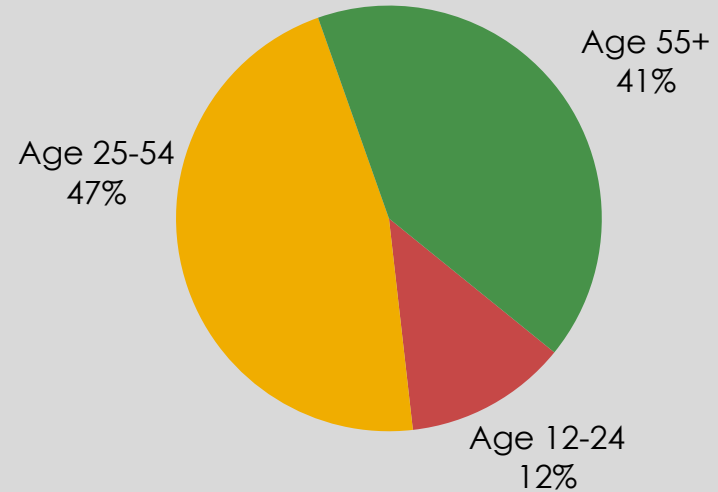
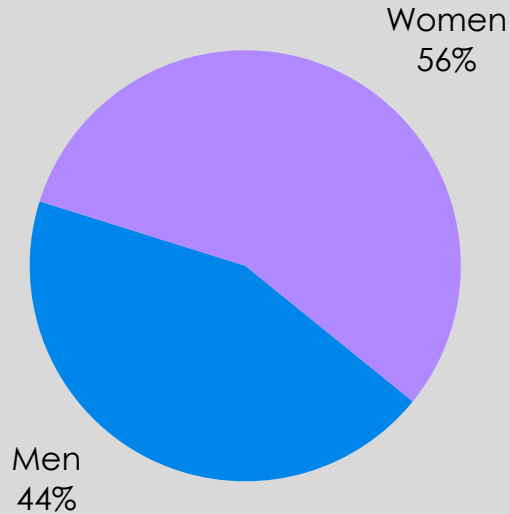
“Would you describe yourself as a ‘Born Again’ or Evangelical Christian?”



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White Evangelical Christian Sample Demographics:



Online Radio



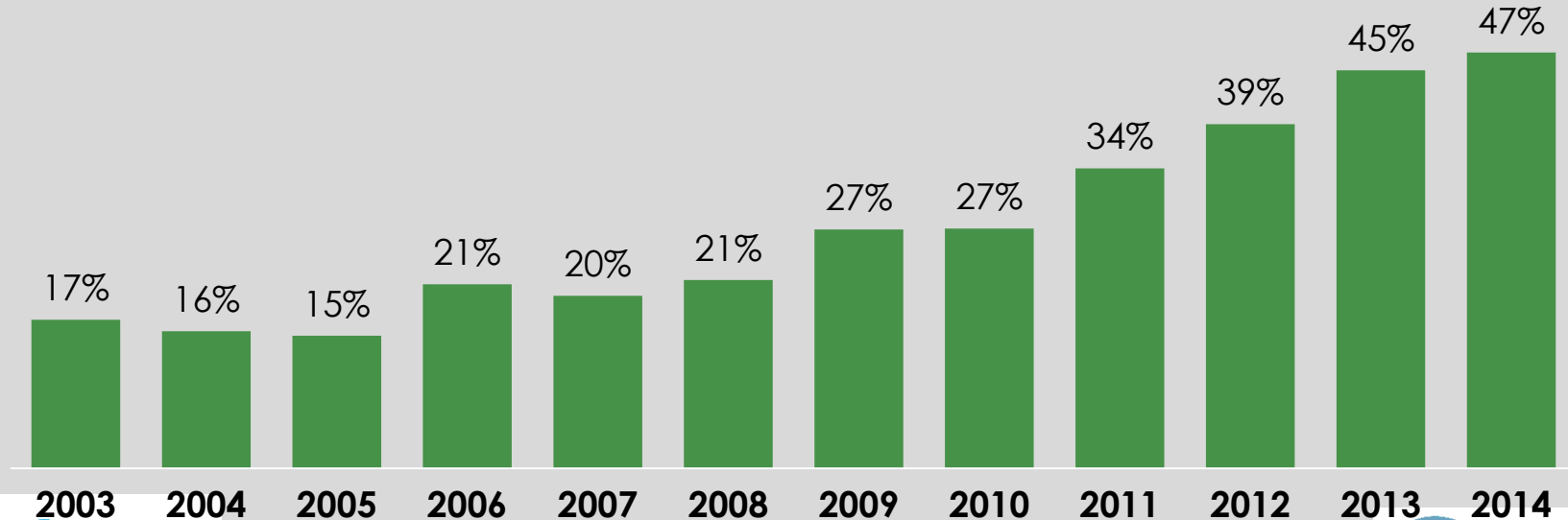
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Monthly Online Radio audience approaching half of Americans

% of Total Population 12+ who have listened to Online Radio in last month

**Estimated
124 Million**



Base: Total Population 12+

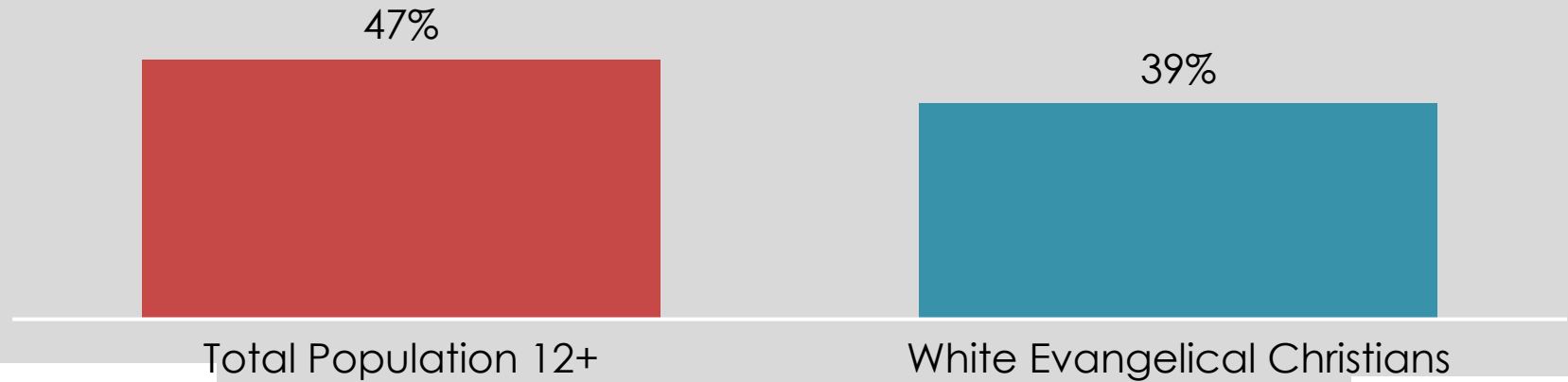


Online Radio = Listening to AM/FM radio stations online and/or listening to streamed audio content available only on the Internet

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Evangelical Christians are not too far behind the Total Population in Online Radio listening

% listened to Online Radio in last month



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



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Percent listened to AM/FM Streams in last month:



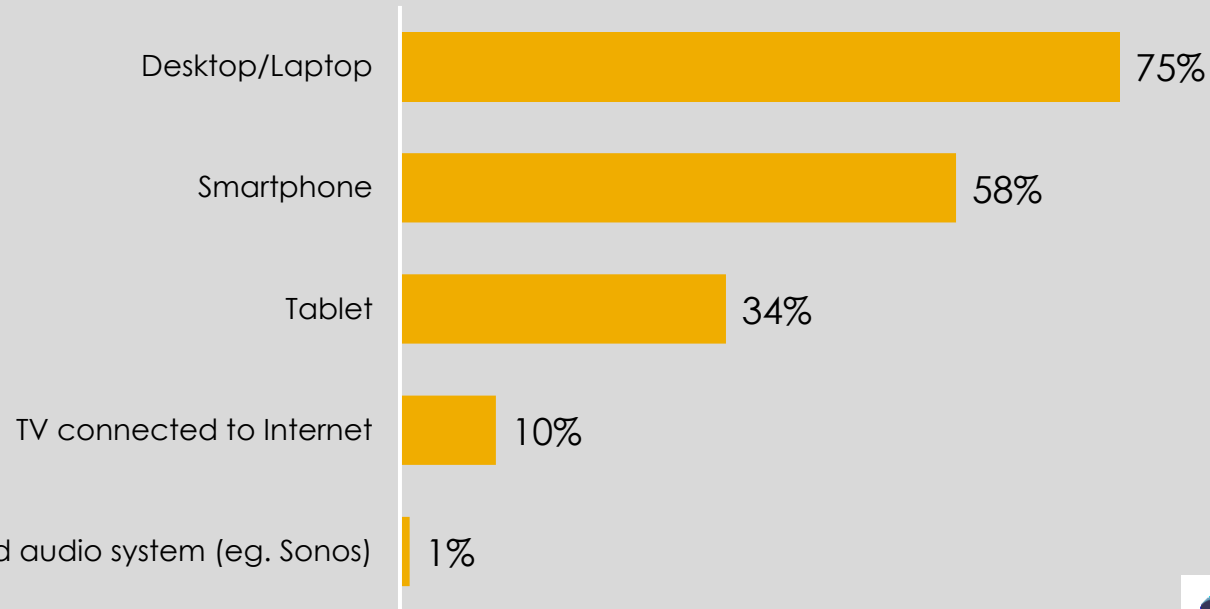
Online Radio = Listening to AM/FM radio stations online and/or listening to streamed audio content available only on the Internet



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Listening on tablets and smartphones will likely grow as ownership increases

% of weekly Online Radio listeners who ever listen via...



Base: White Evangelical Christians who are weekly Online Radio listeners

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



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Audio Brands



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White Evangelical Christians match the total population in SiriusXM subscriptions

% who subscribe to SiriusXM Radio



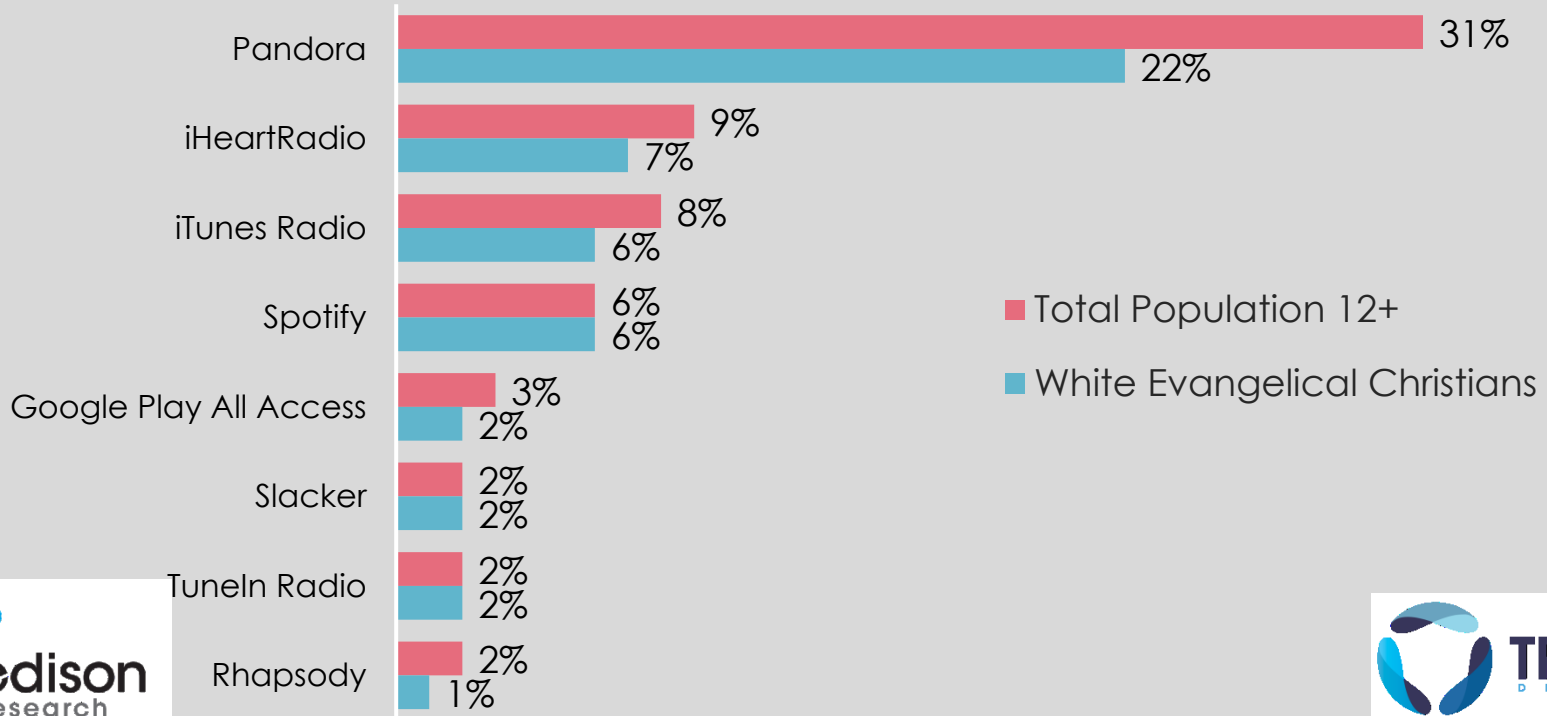
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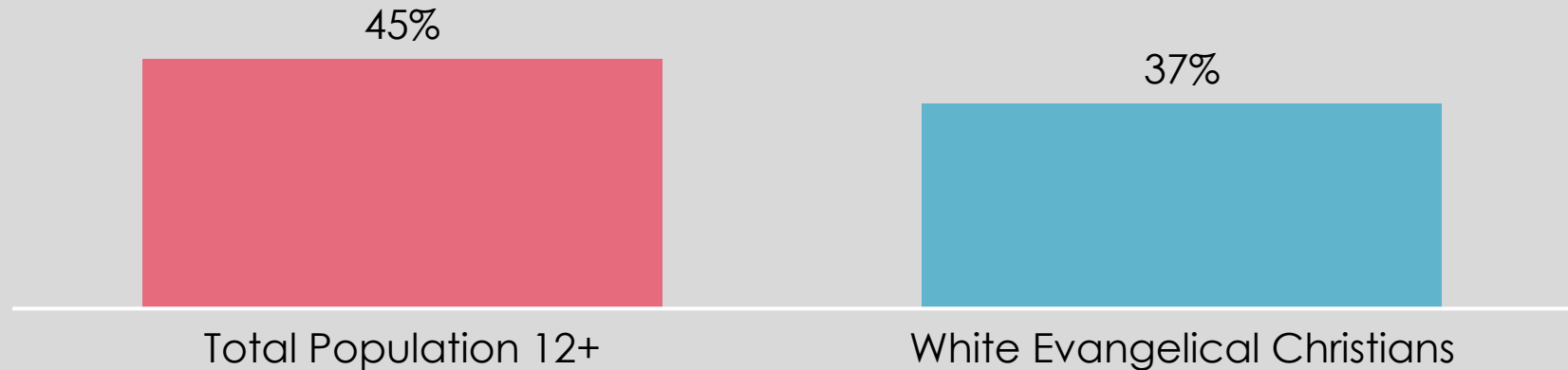
iTunes Radio has presence given it is still in its infancy

% Who Listened in Last Month to...



Significant numbers use YouTube to watch music videos, listen to music

% Who have used YouTube to watch music videos or listen to music in the last month



Percent who have listened to “Music Choice” television channels in the last month:



Podcasting

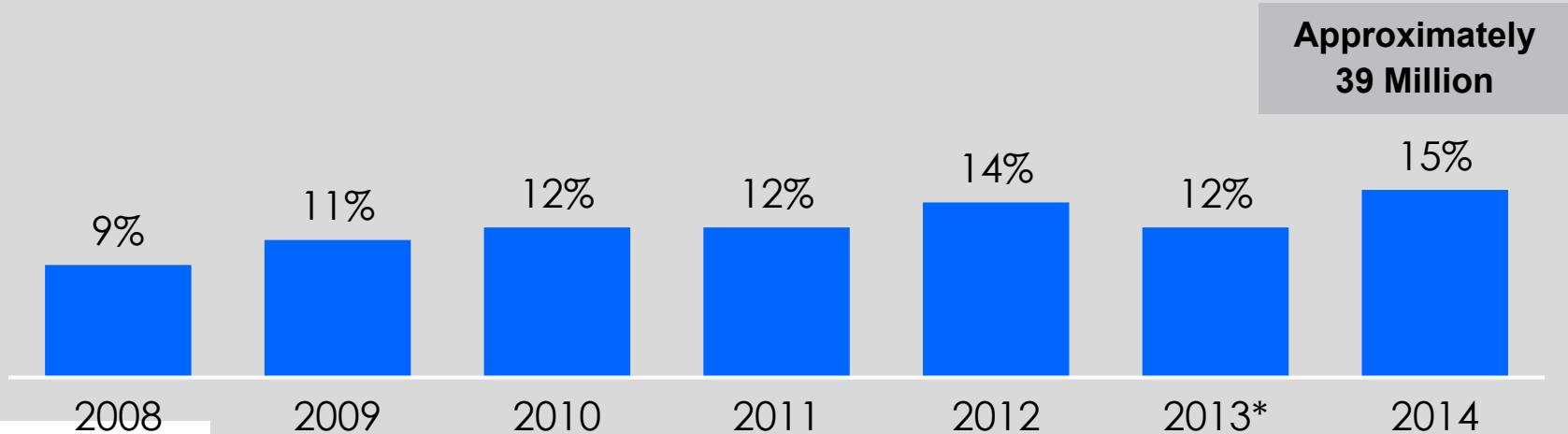


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An estimated 39 million Americans have listened to a podcast in the past month

% of Total Population 12+ who have listened to an audio podcast in last month



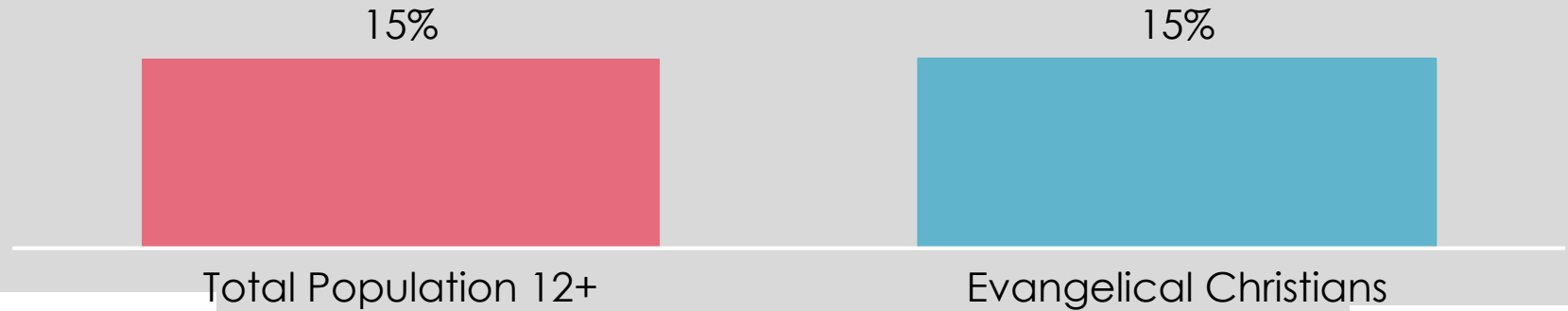
*Note: New Definition Starting in 2013

Base: Total Population 12+



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Percent who have listened to an audio podcast in last month:



Social Networking

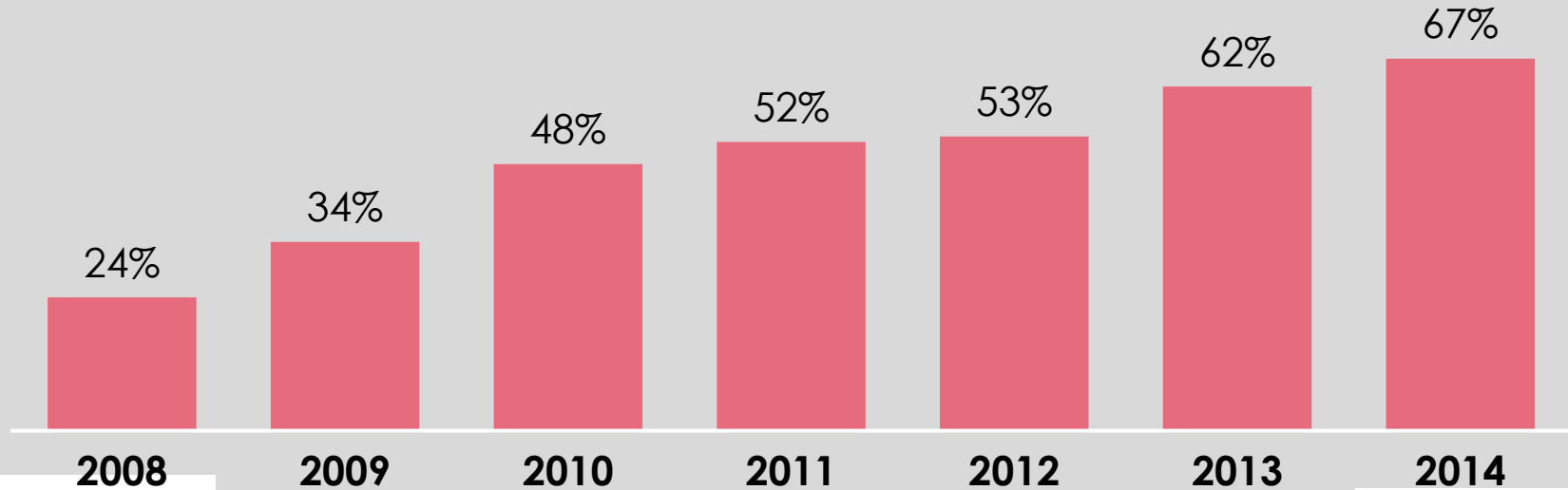


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Two-thirds of Americans have a profile on a social networking site

% of Total Population 12+ who currently have a profile on any social network



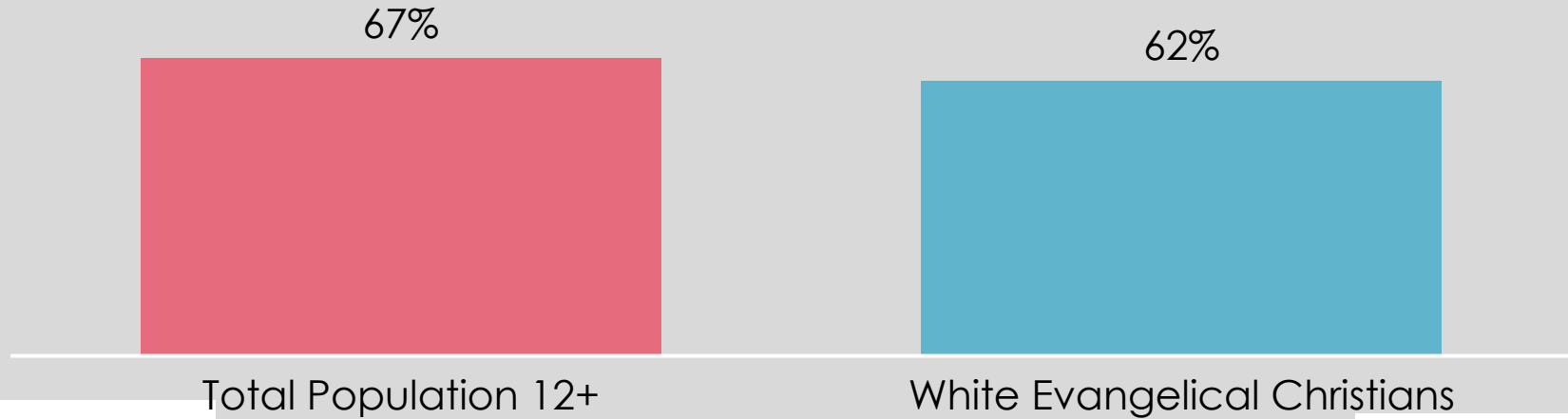
Base: Total Population 12+



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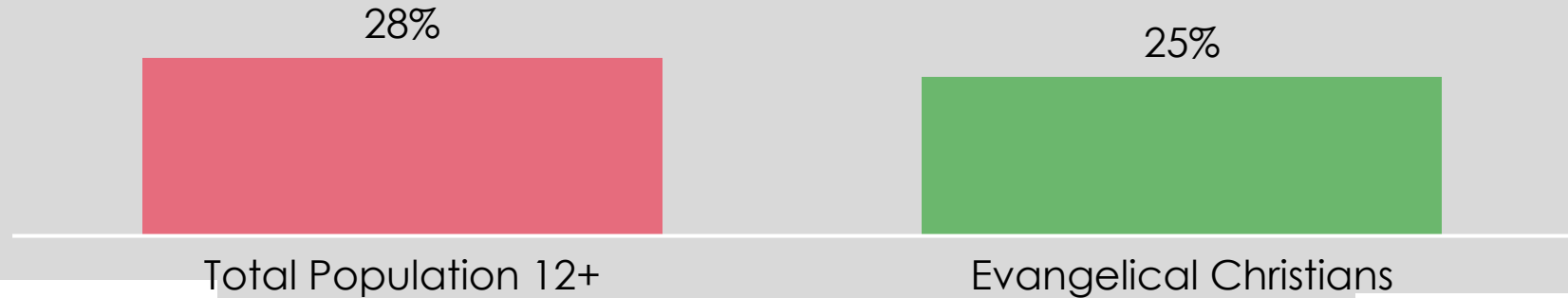
Social Networking is entirely mainstream

% who currently have a profile on any social network



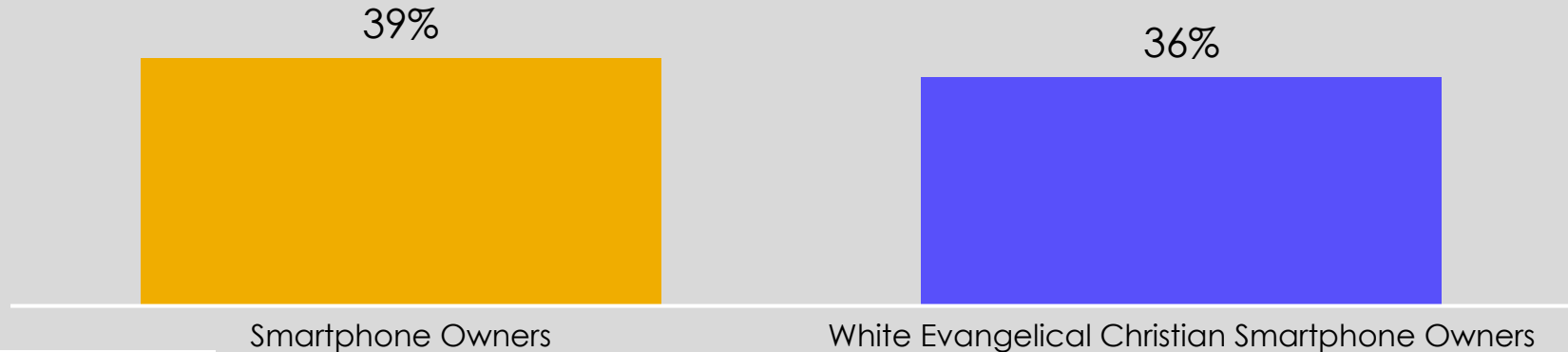
One-quarter of Christians are checking their social network several times per day

% Who Use Social Networking Websites/Services "Several Times per Day"



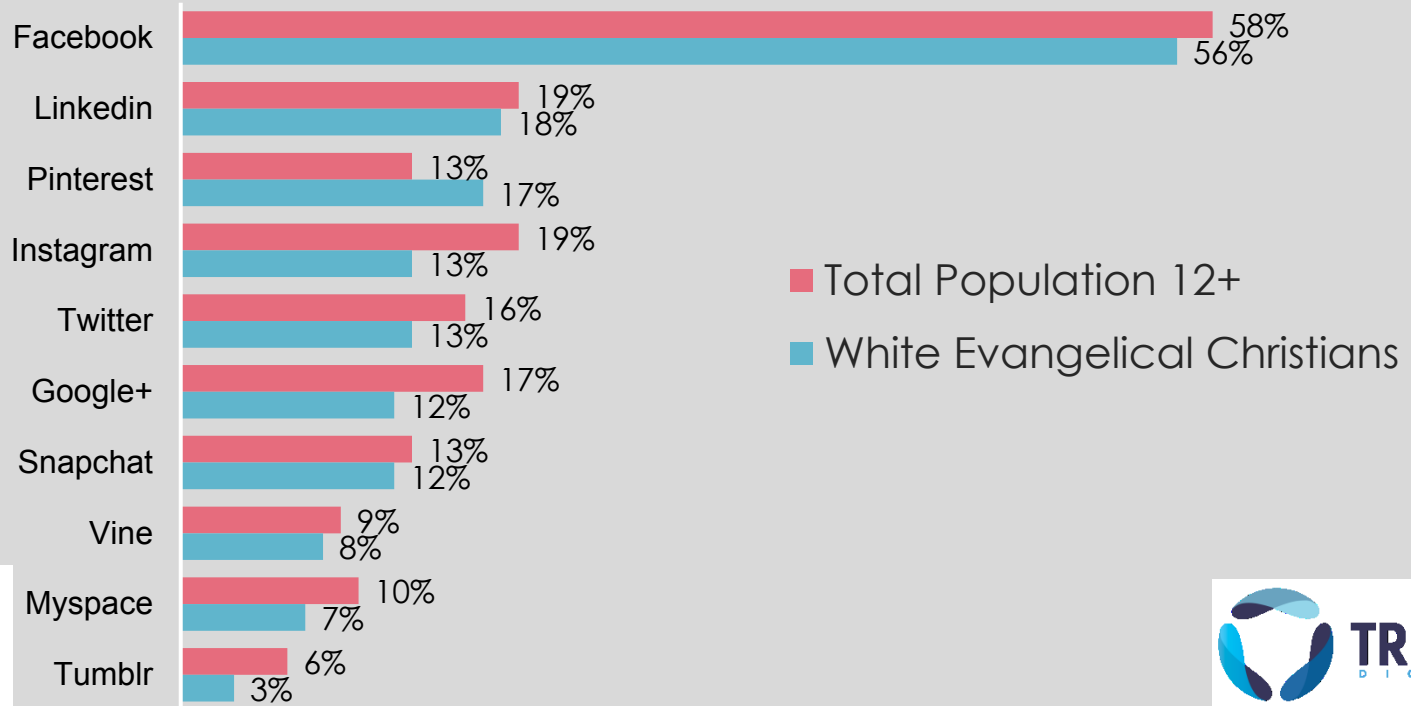
Smartphone owners are even more likely to check social newsfeeds several times per day

% Who Use Social Networking Websites/Services "Several Times per Day"



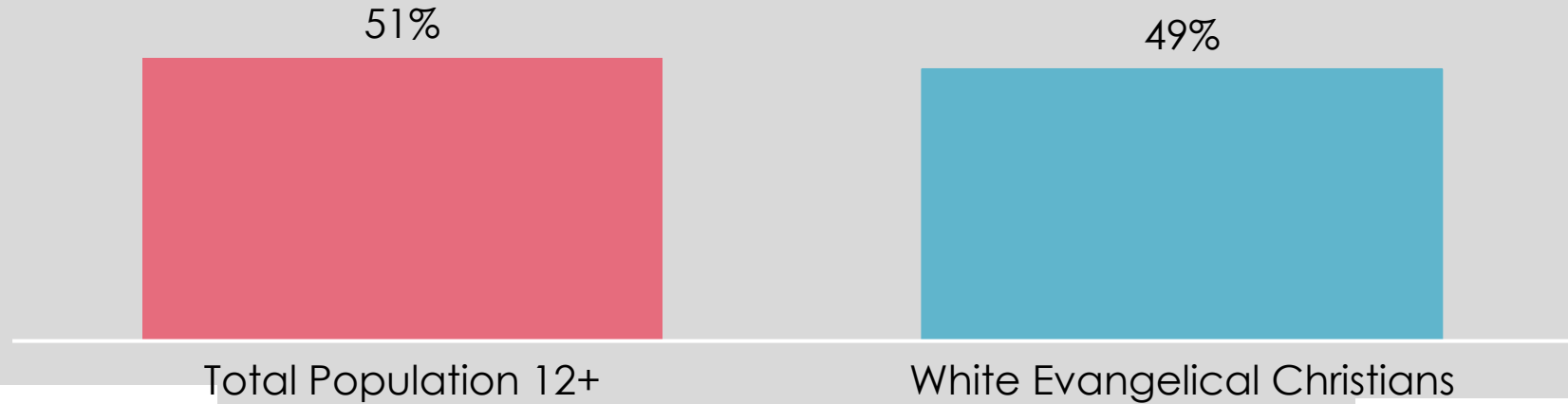
Don't doubt Facebook's importance in your space

% Using Each Social Networking Site/Service



Half own a TV that is connected to the Internet

% who own a TV with device that is connected to the internet



Smartphone and other devices



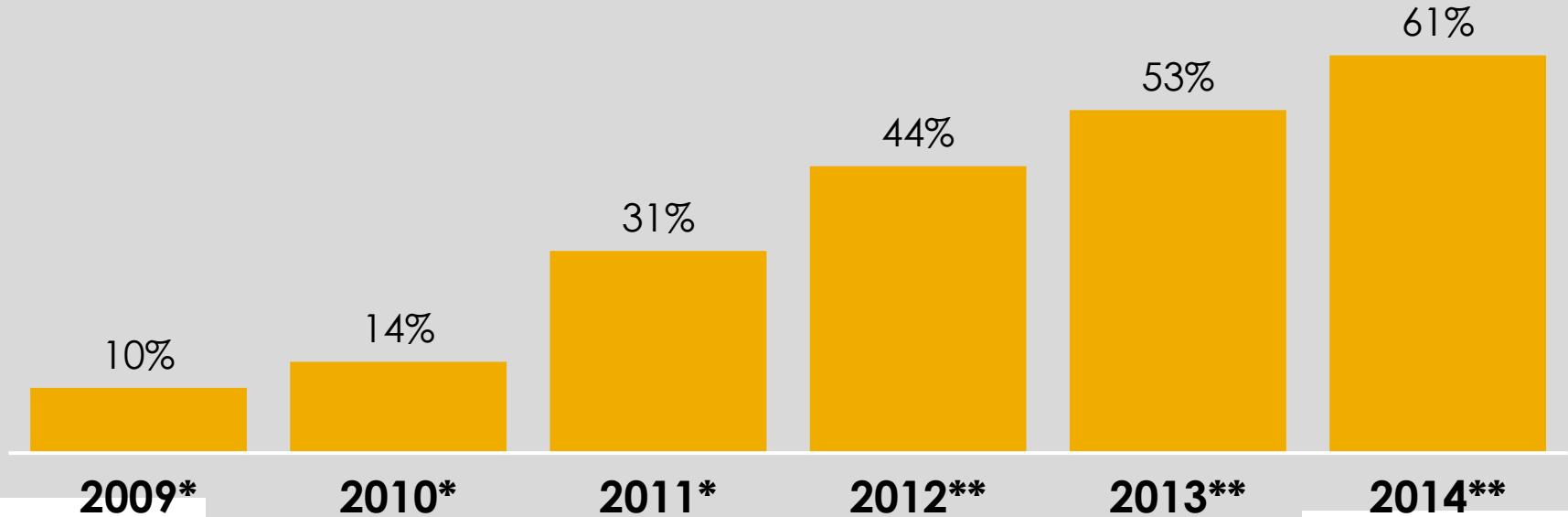
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Over 500% growth in smartphone ownership in five years

% of Total Population 12+ who own a smartphone

Estimated
160 Million



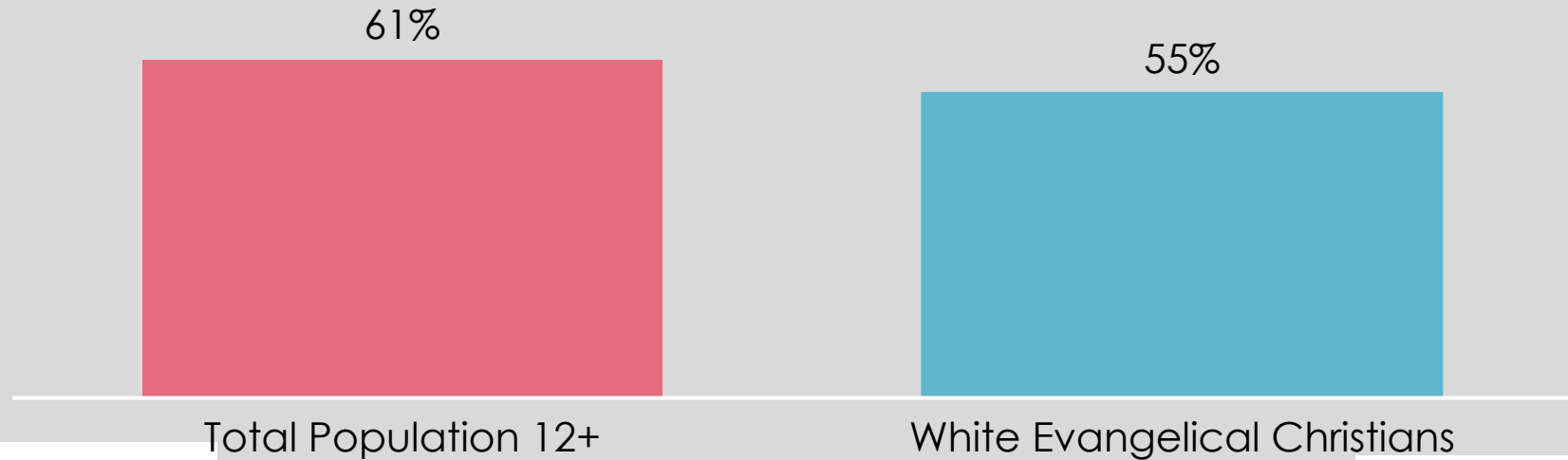
*2009-2011: "Is your cell phone a smartphone?"
**2012-2014: Own an Apple iPhone, Android
smartphone, BlackBerry, or Windows smartphone
Base: Total Population 12+



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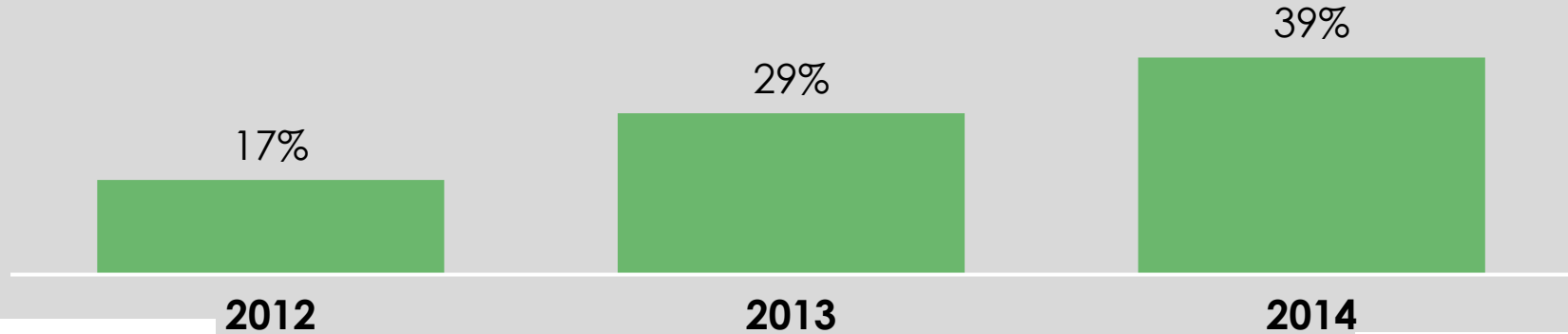
The device that is changing everything – the smartphone

% who own a smartphone



Tablet ownership makes another huge year-over-year leap

% of Total Population 12+ who own a tablet

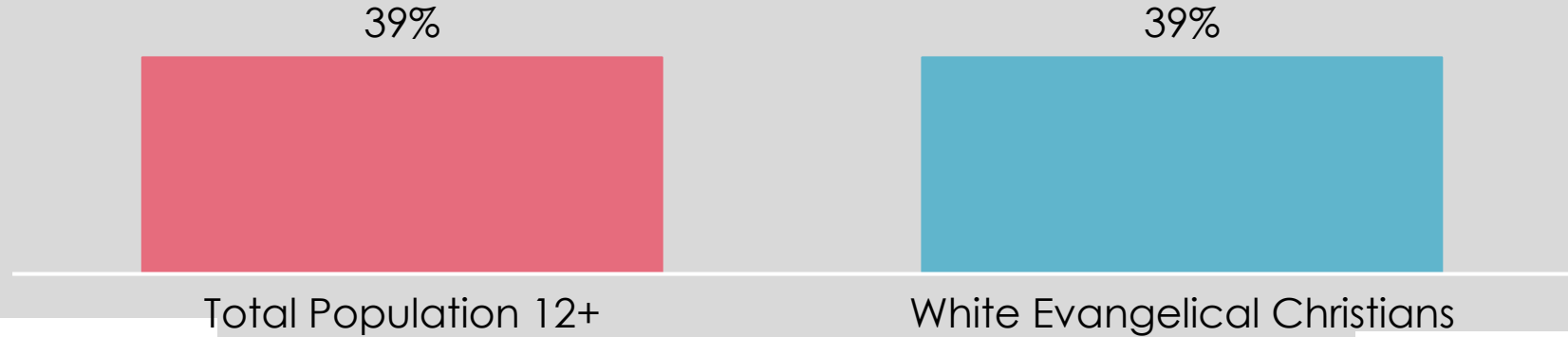


Base: Total Population 12+

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Four in ten own a tablet

% who own a tablet



In-Car Media

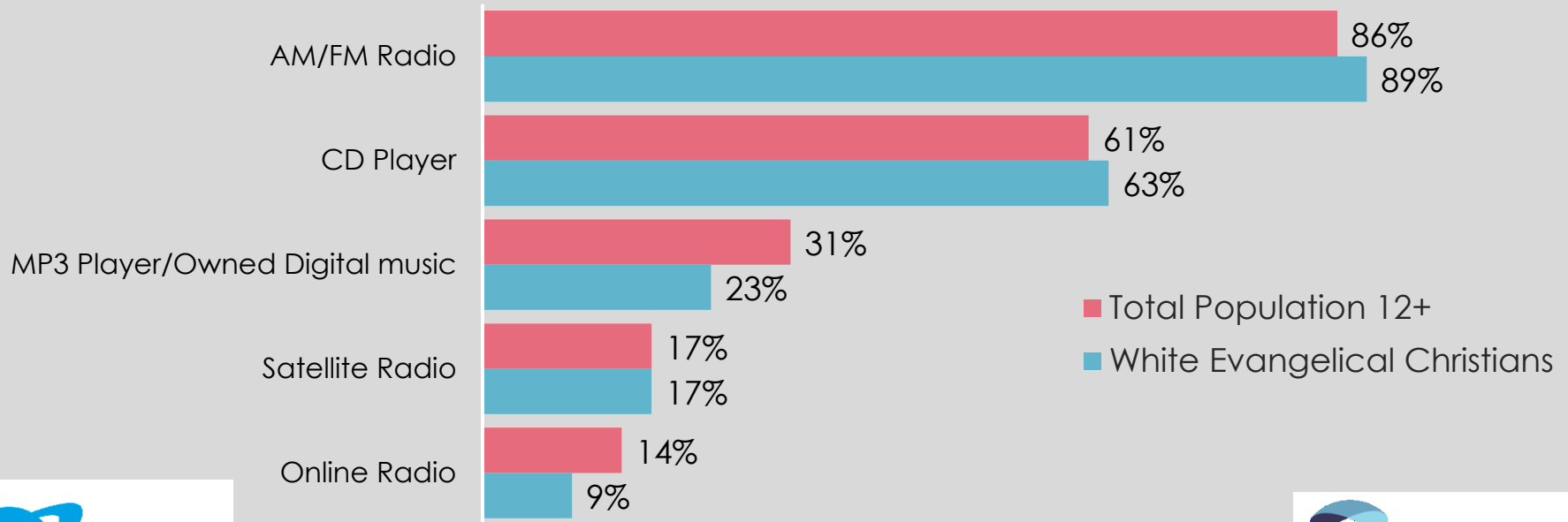


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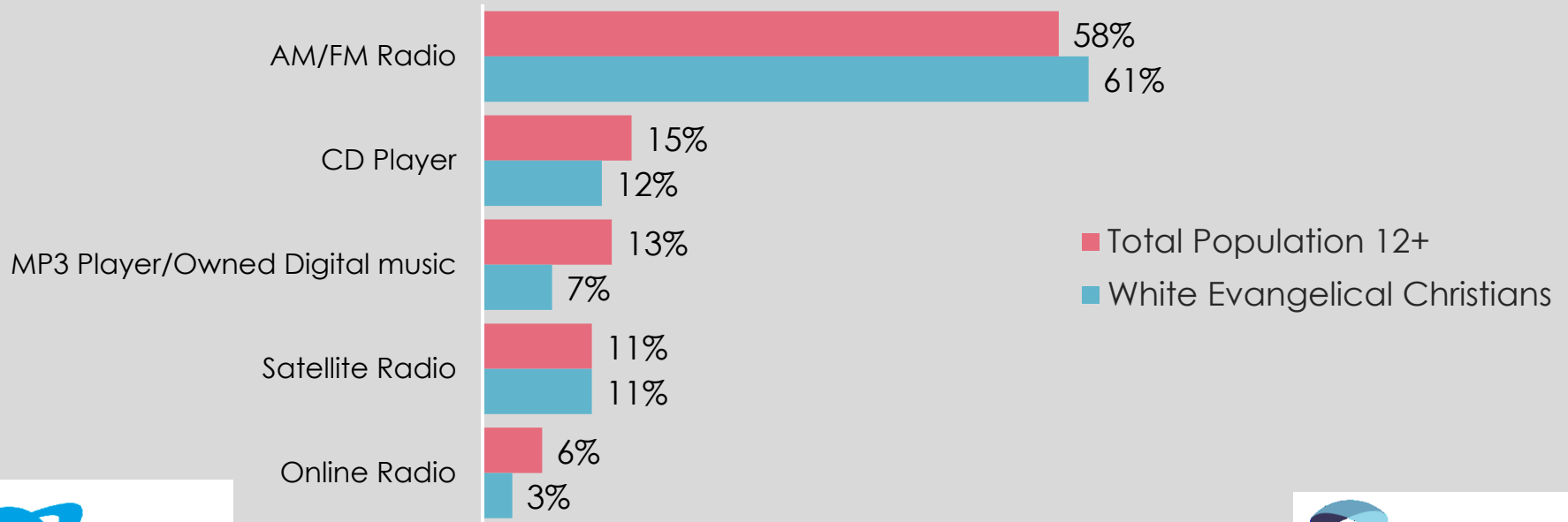
AM/FM Radio dominates in-car media

% of Evangelical Christians who currently ever use in primary car



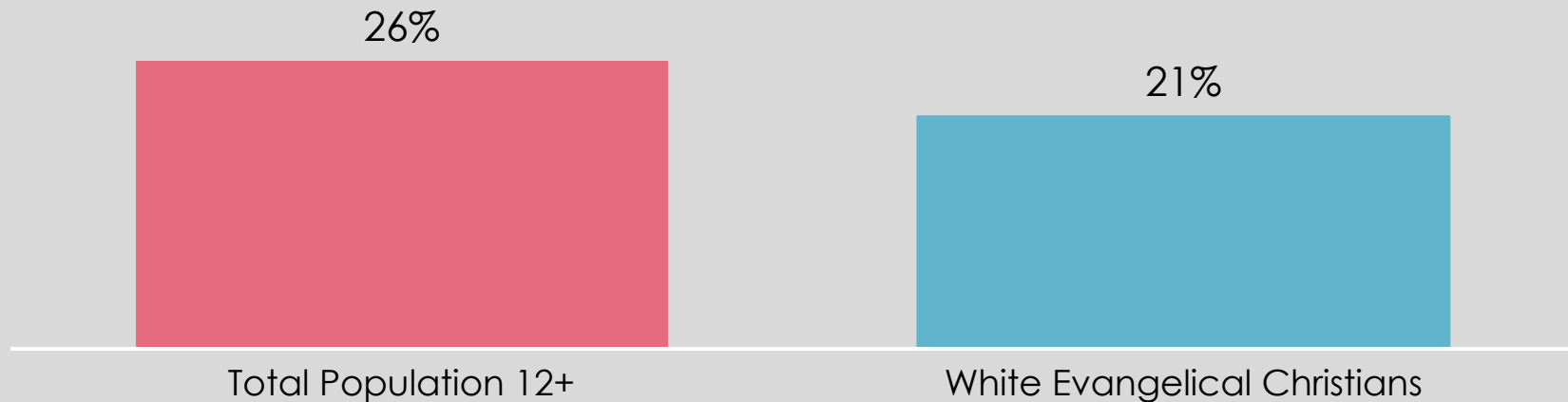
AM/FM radio has far more frequent usage than other in-car audio options

% of Evangelical Christians using “Almost All of the Times” or “Most of the Times” in the car



The connected car is already here

% 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



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Takeaways



Observation:

- The Internet Audio pie continues to grow -- the leading services are growing, but so far no evidence it's at one another's expense

Reaction:

- Recognize that Christian Radio not immune to this competition



Observation:

- Half of Christians are using social media

Reaction:

- This is an opportunity to be closer than ever to your audience!



Observation:

- Mobile devices are rewiring behavior extremely quickly

Reaction:

- AM/FM Radio streams are an important part of Online Radio usage
- Challenge: How else can you be present in your listeners' mobile lives?



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