

**The Infinite Dial  
Israel**

**Online  
Radio**

**Social  
Media**

**FM Radio**

**Internet  
Usage**

**In-Car Media**

**YouTube**



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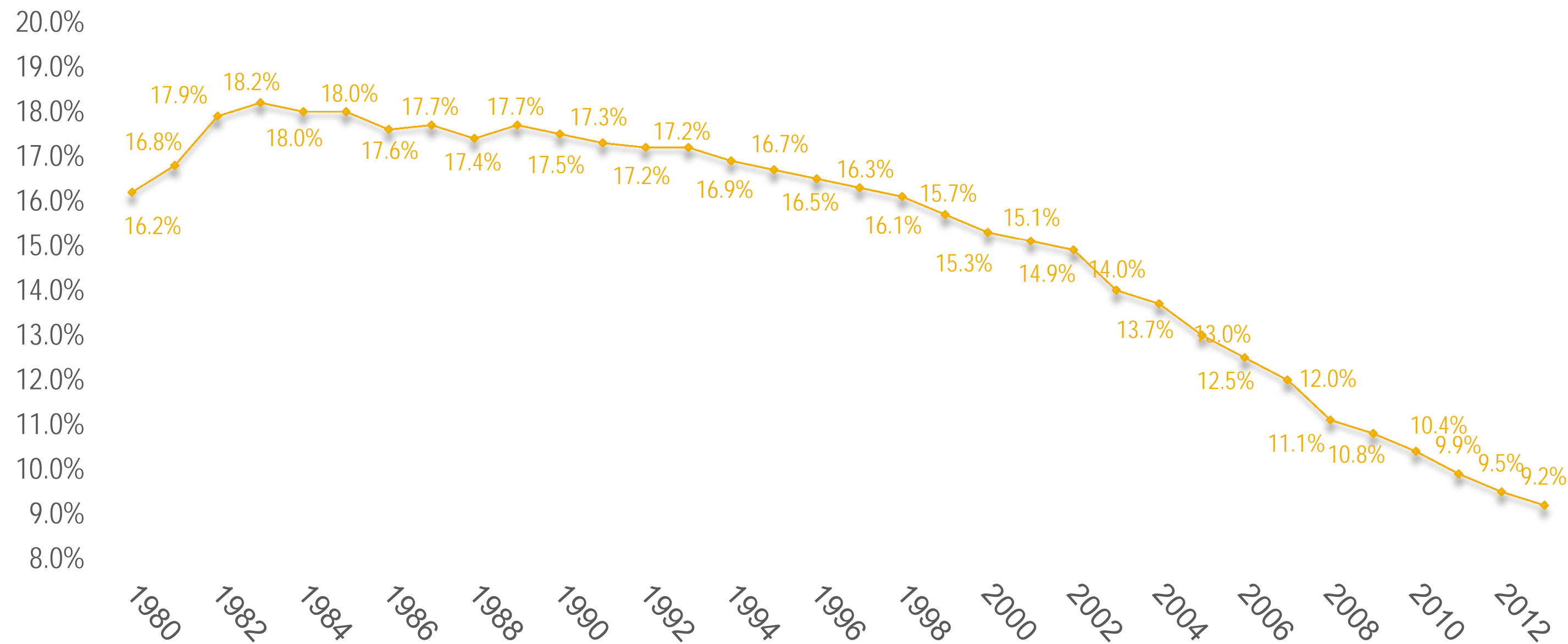


# The Golden Age of Radio?



# USA National Radio Ratings

## Spring Quarter 1980-2013



# The Golden Age of Radio



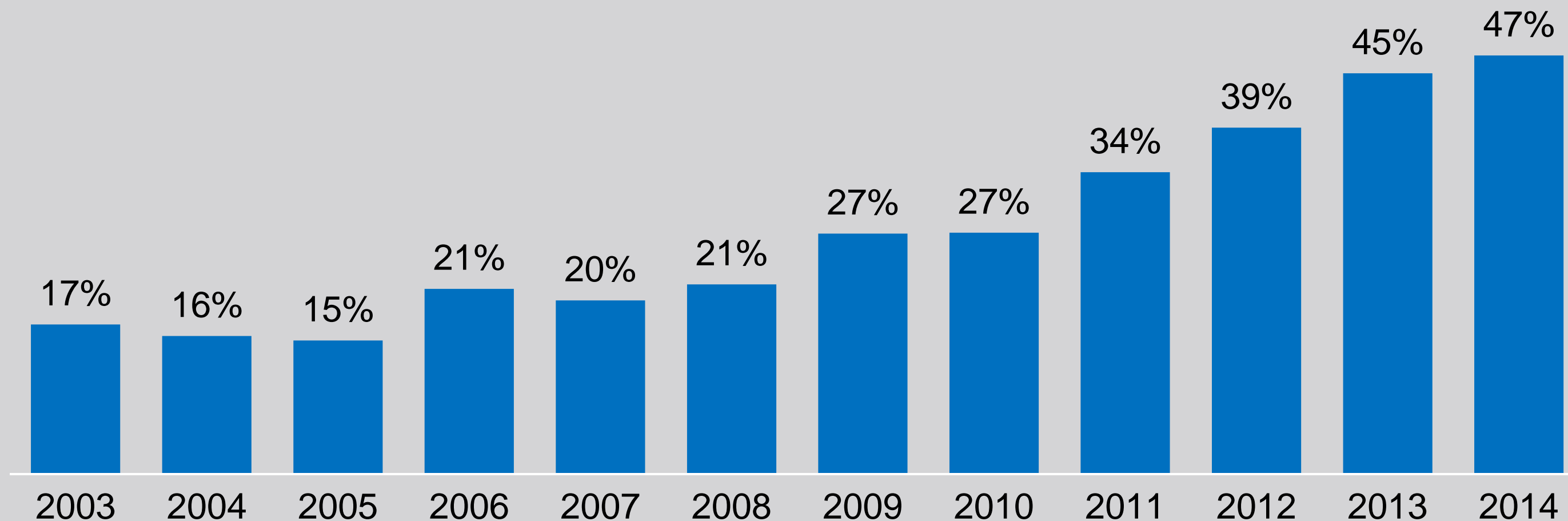
# The Golden Age of Audio



# Monthly Online Radio Audience Approaching Half of Americans

% Who Have Listened to Online Radio in Last Month

**Estimated  
124 Million**



*Base: Total Population 12+*

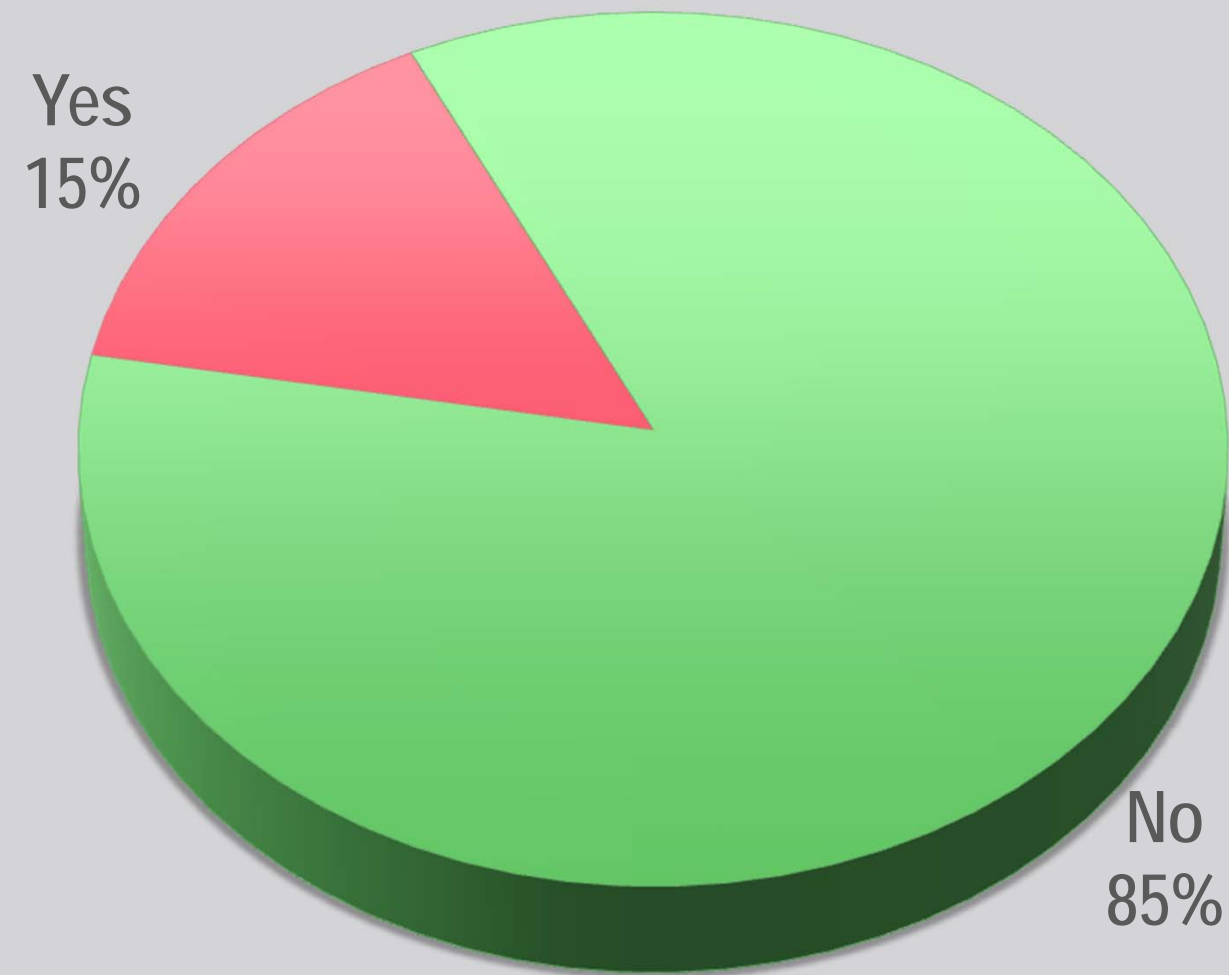


Online Radio = Listening to AM/FM radio stations online and/or listening to streamed audio content available only on the Internet

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# About one-in-six American Households subscribes to Satellite Radio

"Do you currently subscribe to Sirius XM Radio?"

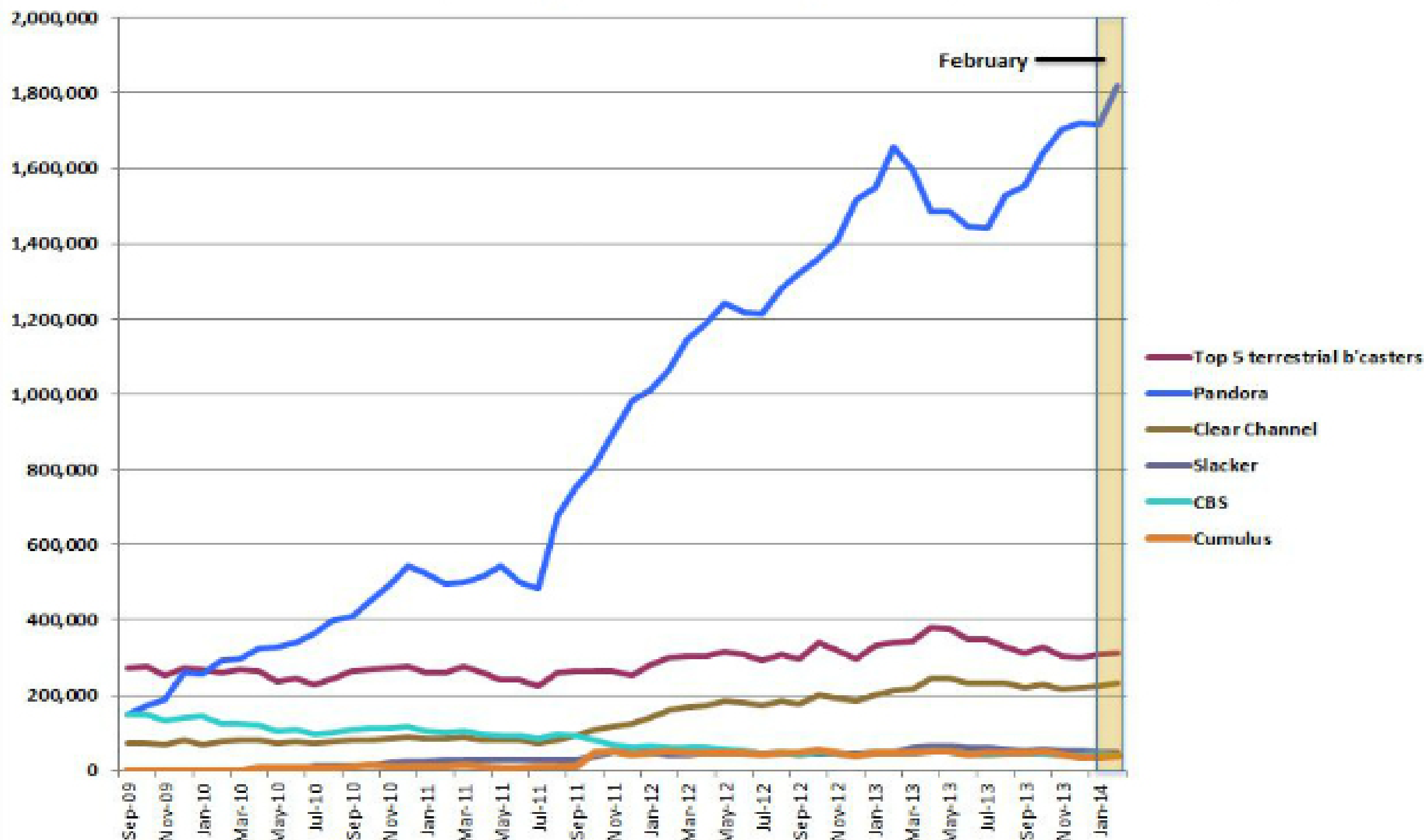


# The Golden Age of Audio





# Historical Trend, Average Active Sessions (Domestic, Mon-Sun 6a-12m)



# Pandora's "Killer Apps"

- 1) Customization
- 2) Song Skipping
- 3) Ease of Use – "Radio"-style experience



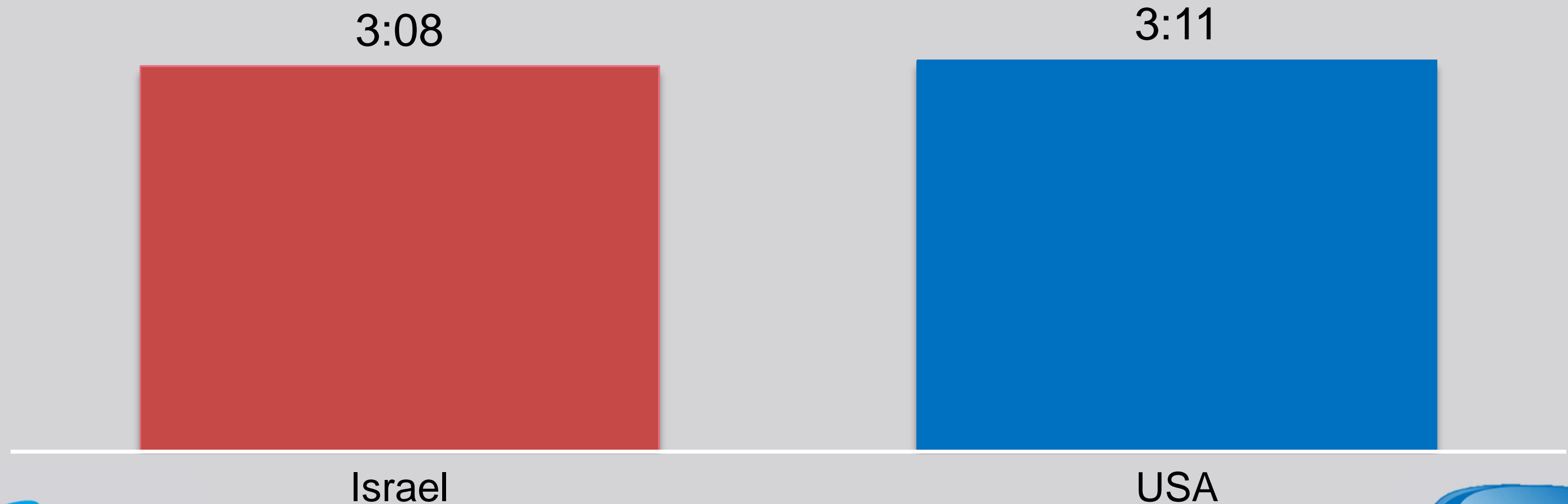
# Edison & Cue-Ad Survey

- In March 2014, Edison Research and Cue-ad conducted an online quantitative survey in two representative samples:
  - 153 Youth ages 15-17
  - 501 Adults ages 18-65
- The survey was conducted as an online survey in the TNS Israel Internet Access Panel, which represents the online population in Israel
- Data compared to Edison Research “Infinite Dial” survey of February 2014



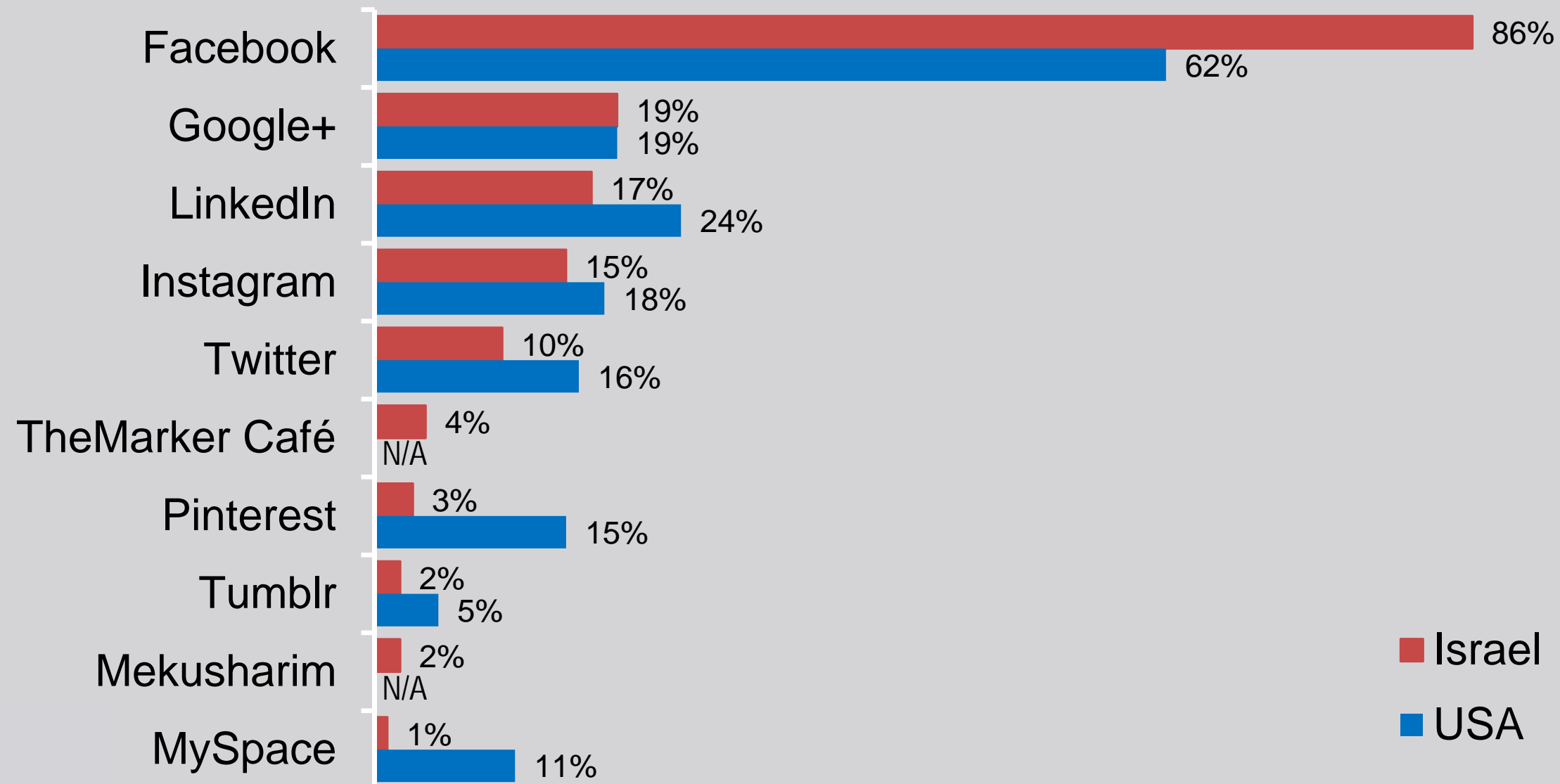
# How much time did you spend going on the Internet from any device?

Average Time Spent on the Internet in Previous Day  
(Hours:Minutes)



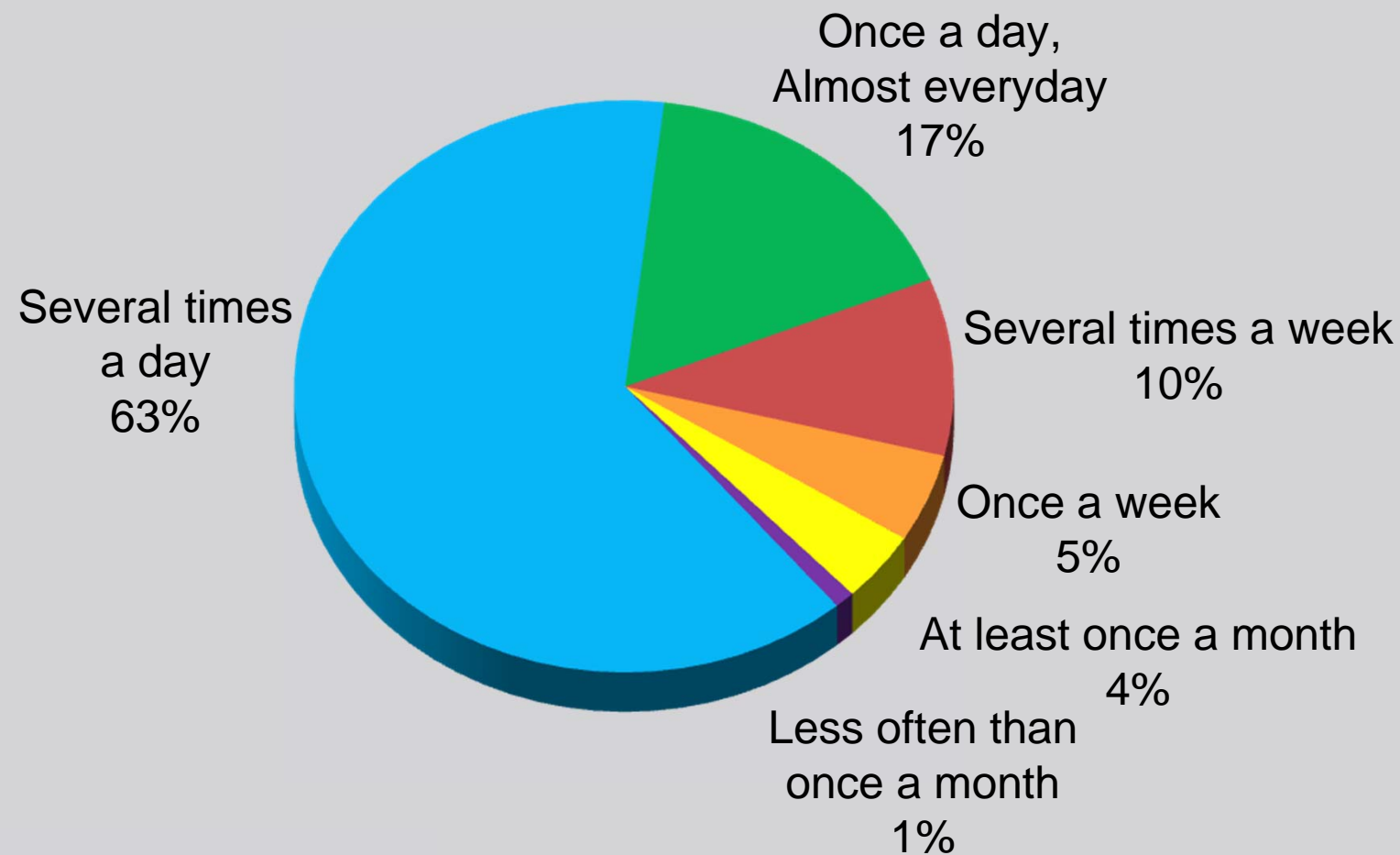
# Israelis are using social media in a big way

% Using Each Social Networking Site/Service

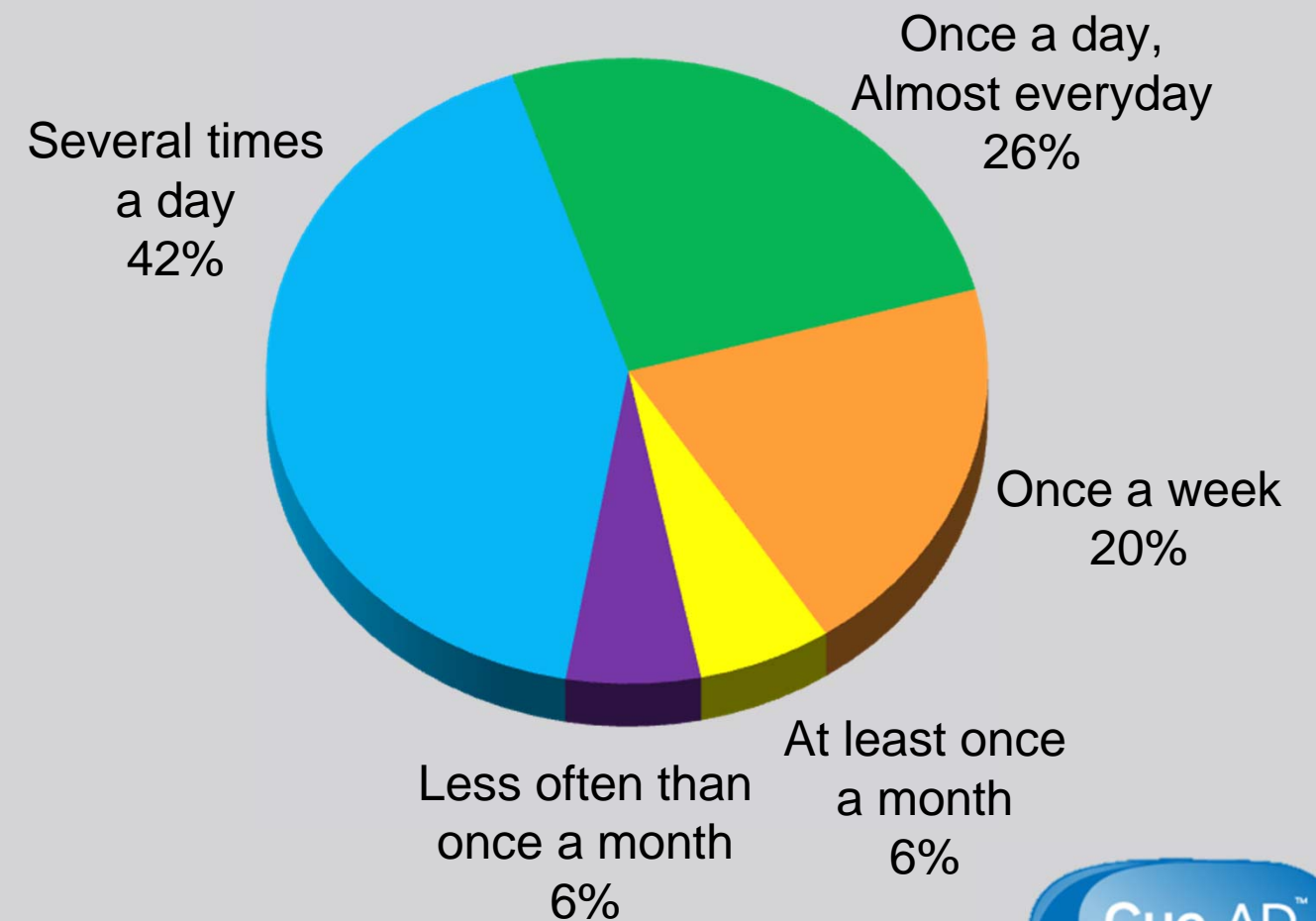


# How frequently do you check your social network account?

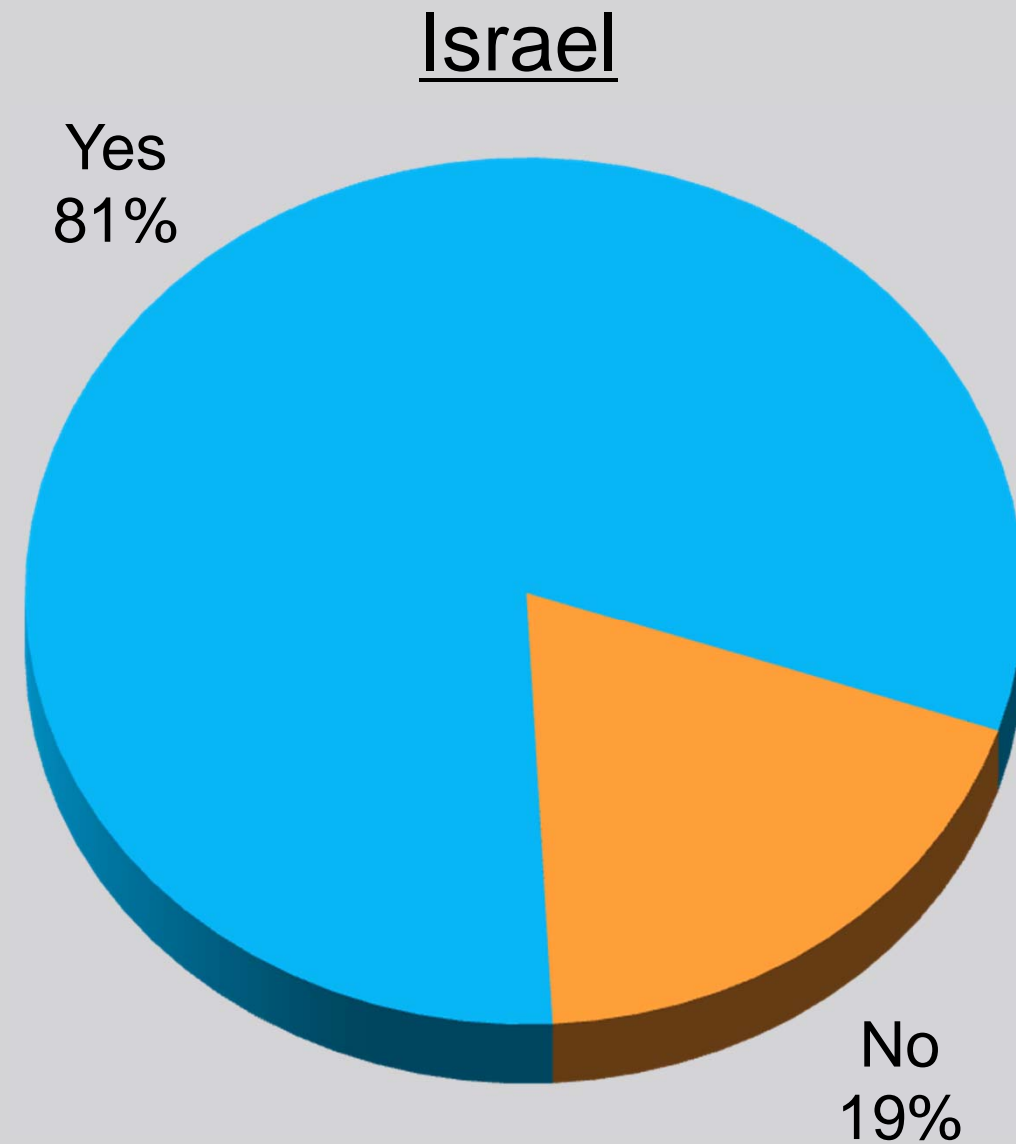
Israel



USA

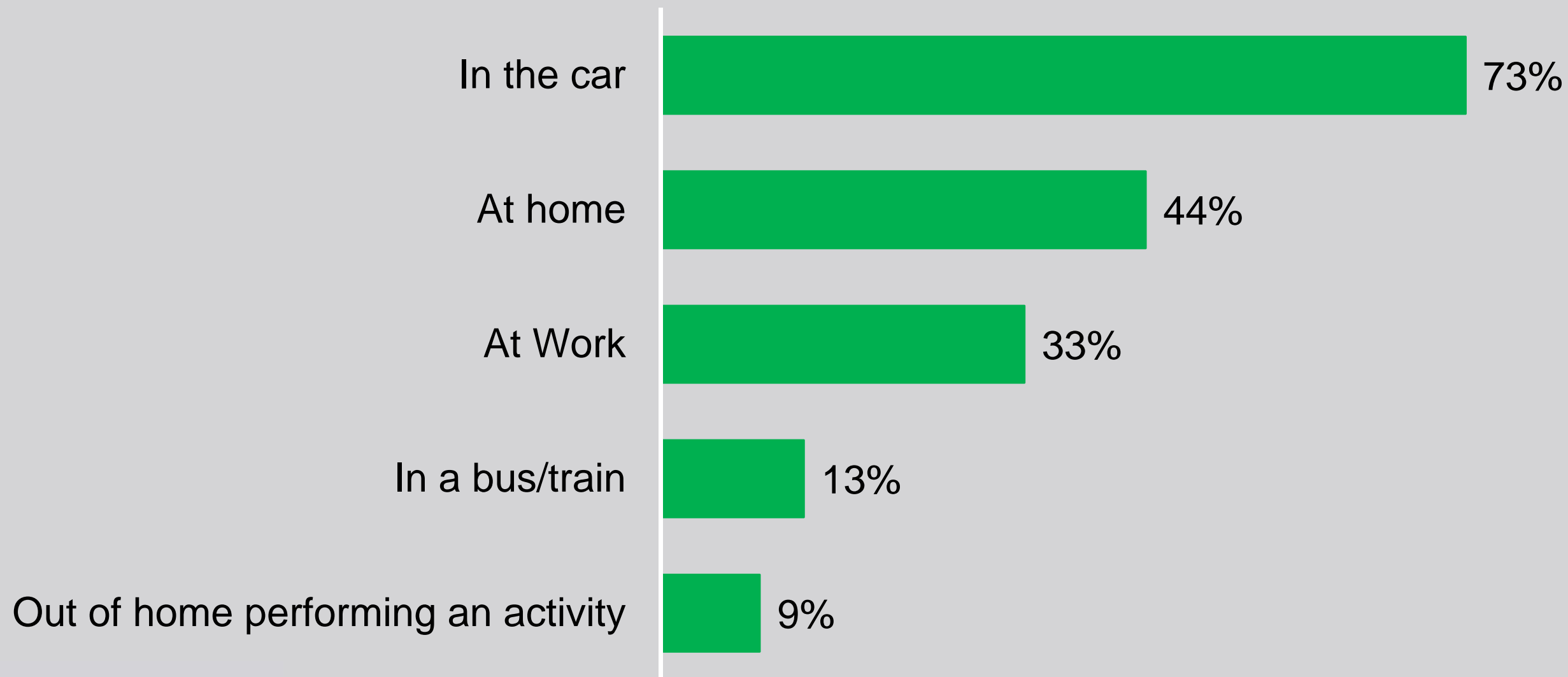


# Have you listened to FM radio stations (through regular radio, the internet or TV) in the past week?



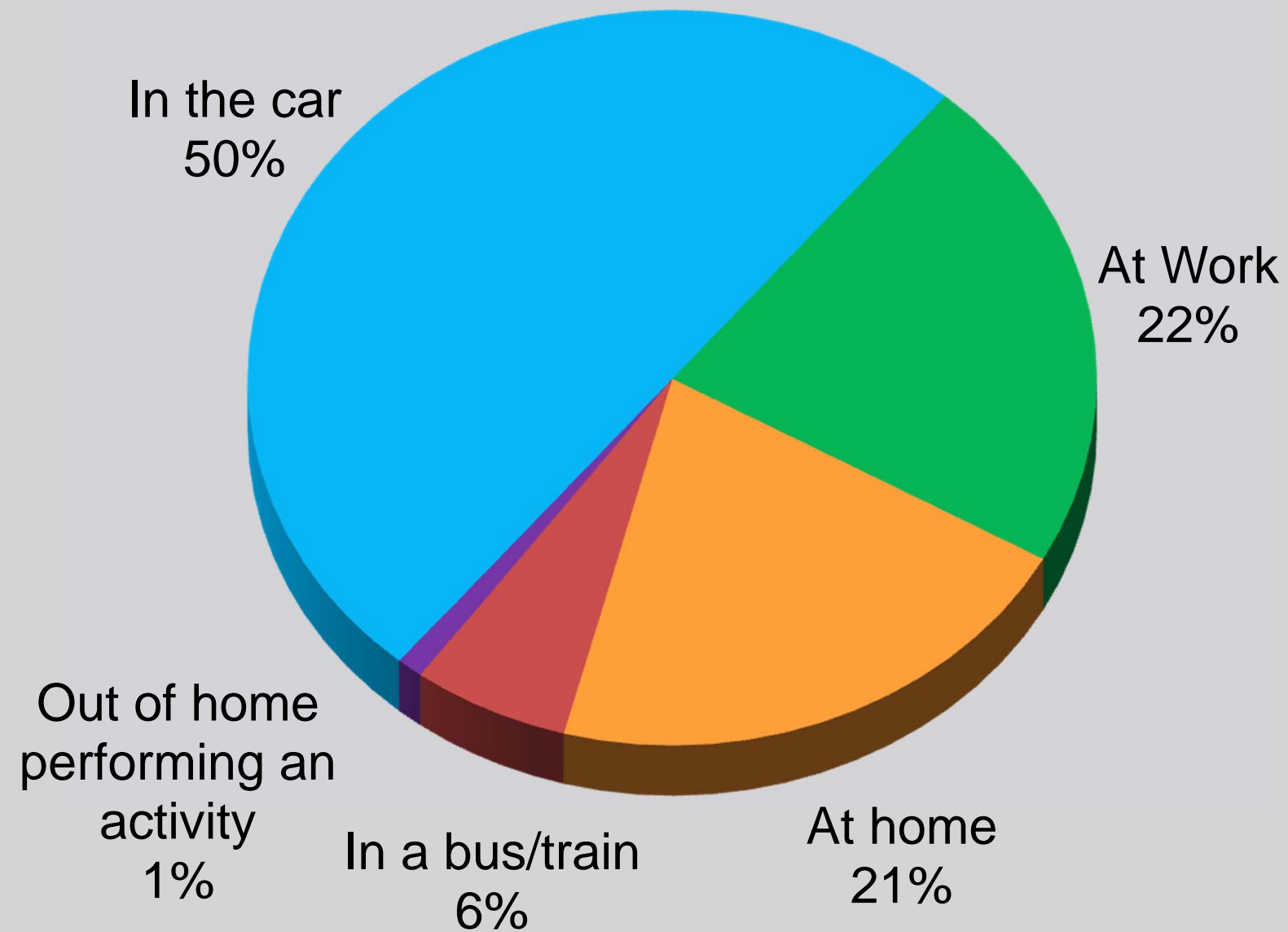
# Most Israelis listen to FM Radio in the car

% of Israeli FM Radio Listeners Who Listened in the Last Week...

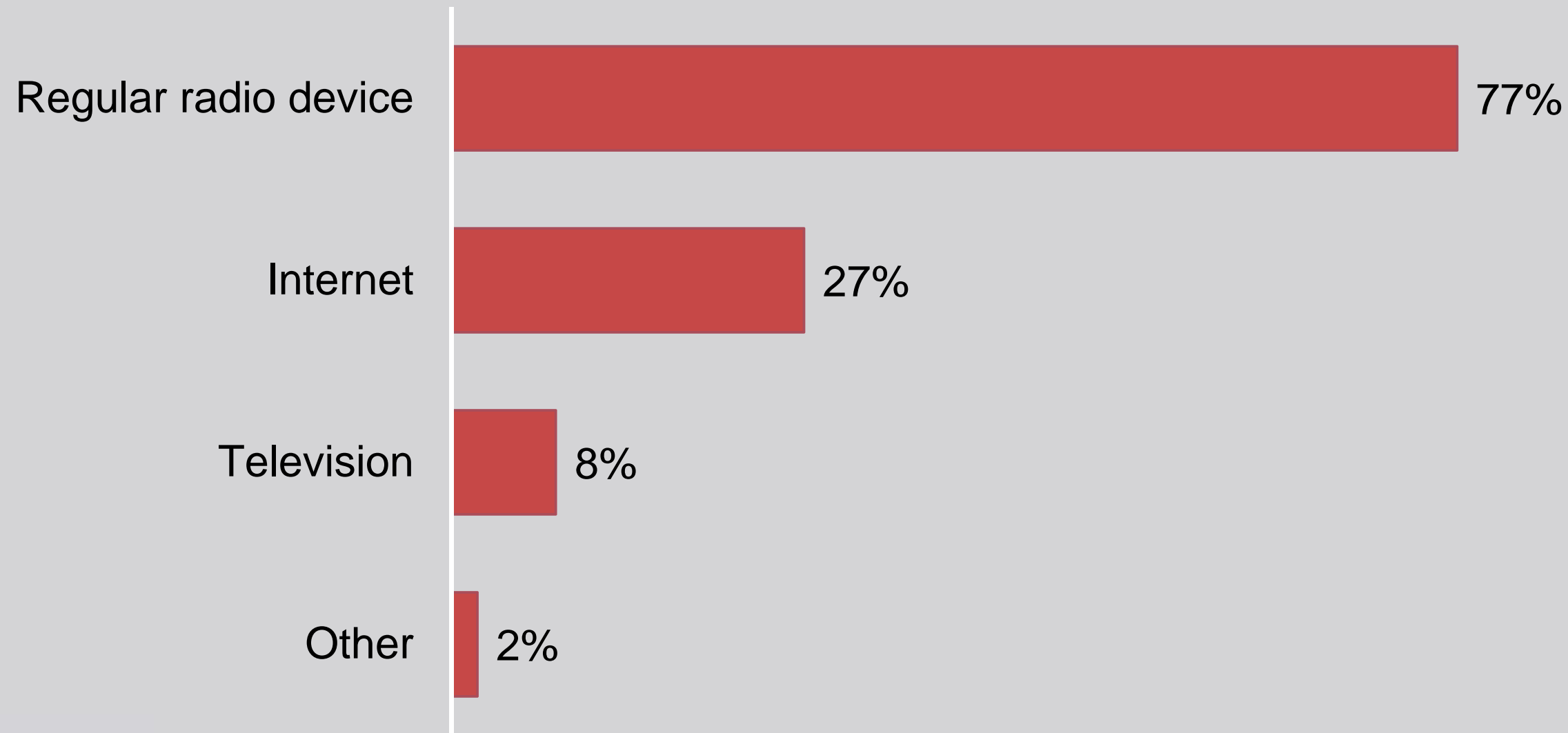


# The car is the primary place Israelis listen to FM Radio

% of Israeli FM Radio Listeners Who Listened Most in the Last Week...

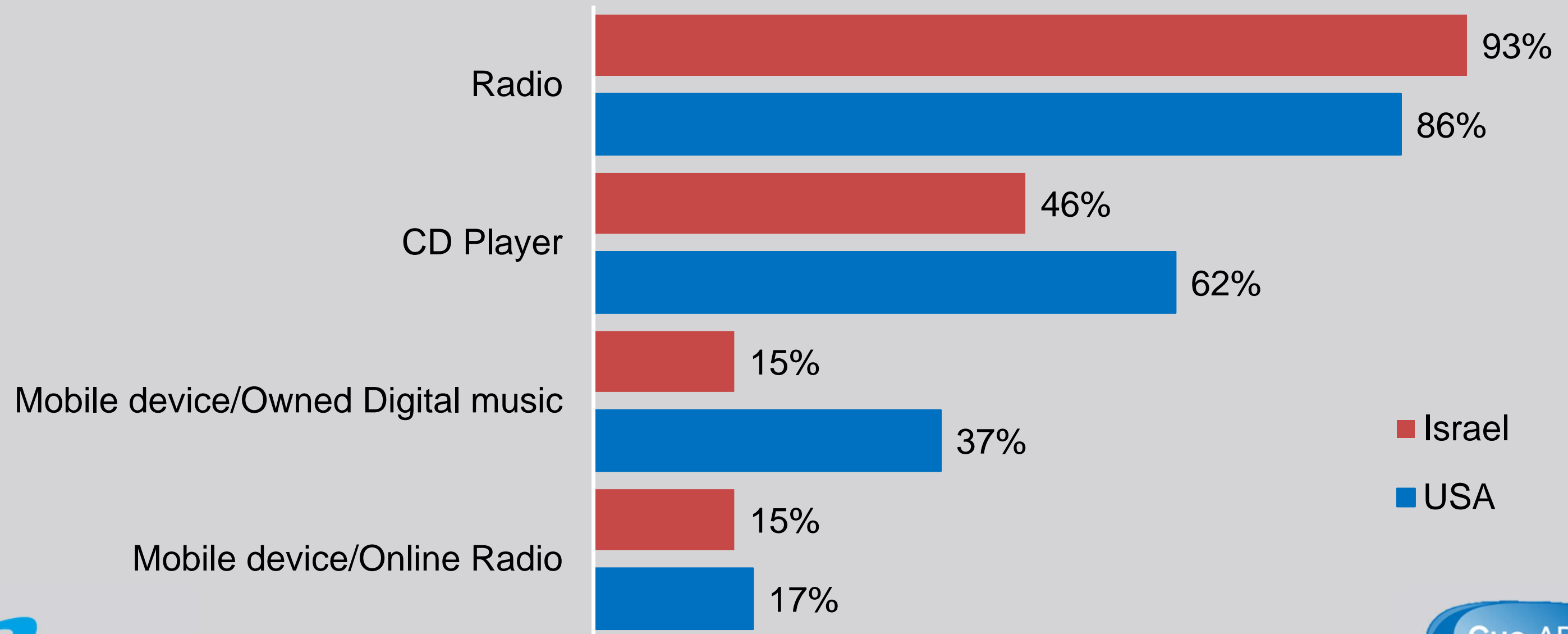


# % of Weekly Israeli Listeners Who Listen to FM Radio Using...



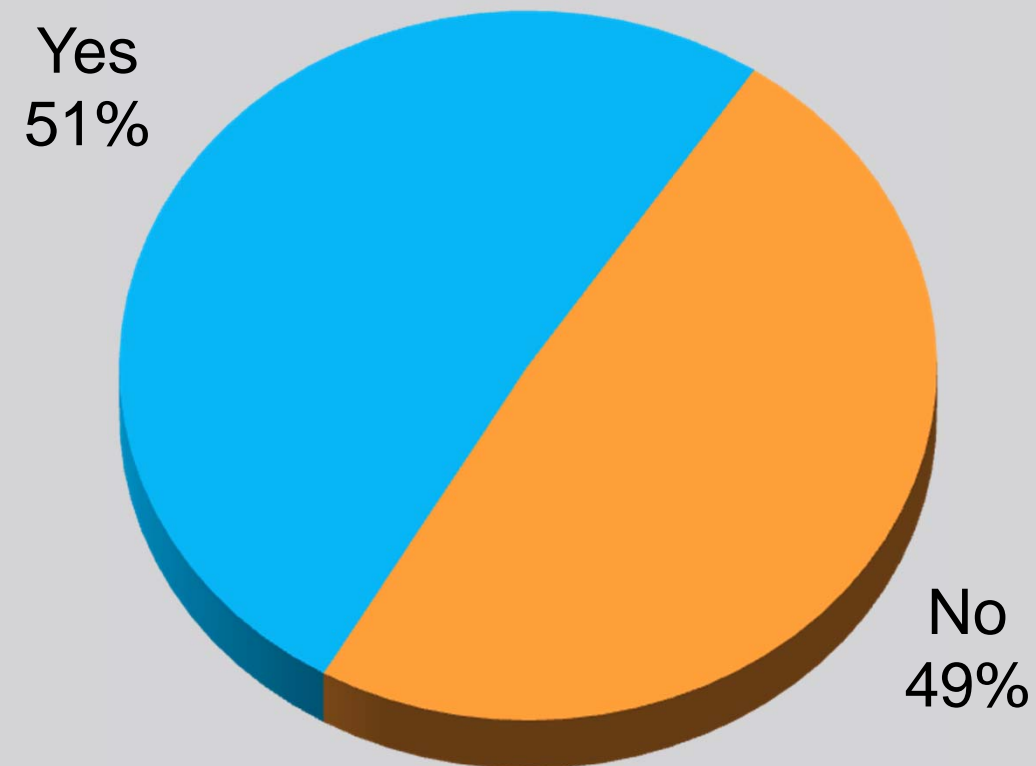
# Radio Dominates In-Car Media

% Who Currently Ever Use in Primary Car

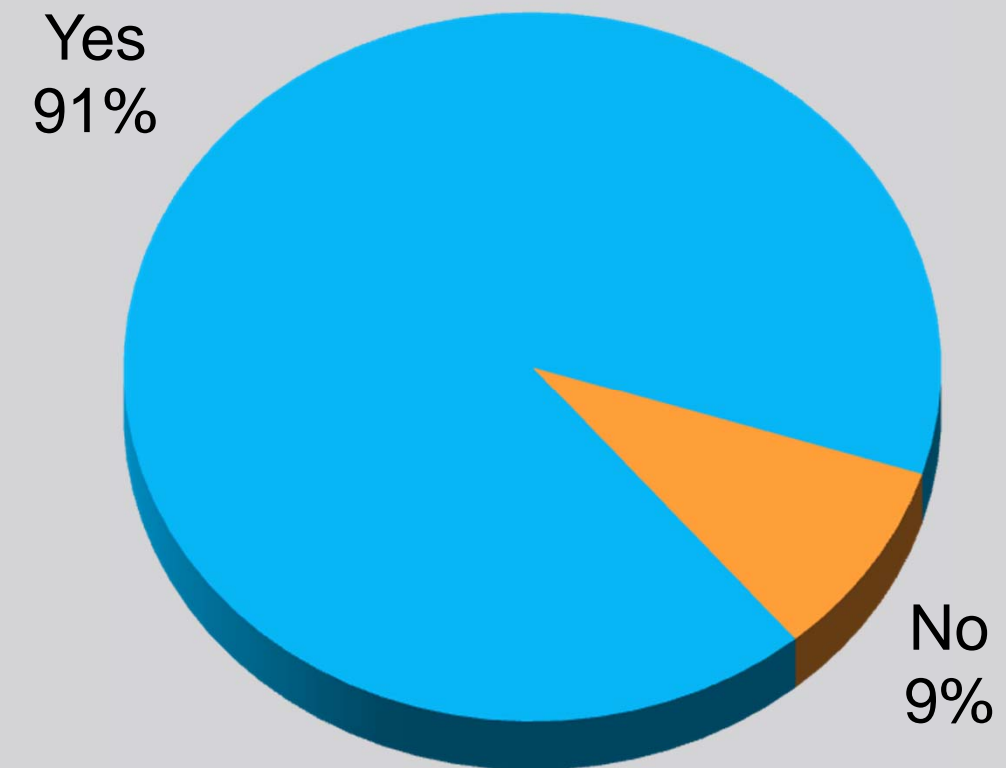


# Are you aware of any stations that broadcast only over the Internet, that you cannot listen to on a regular radio device?

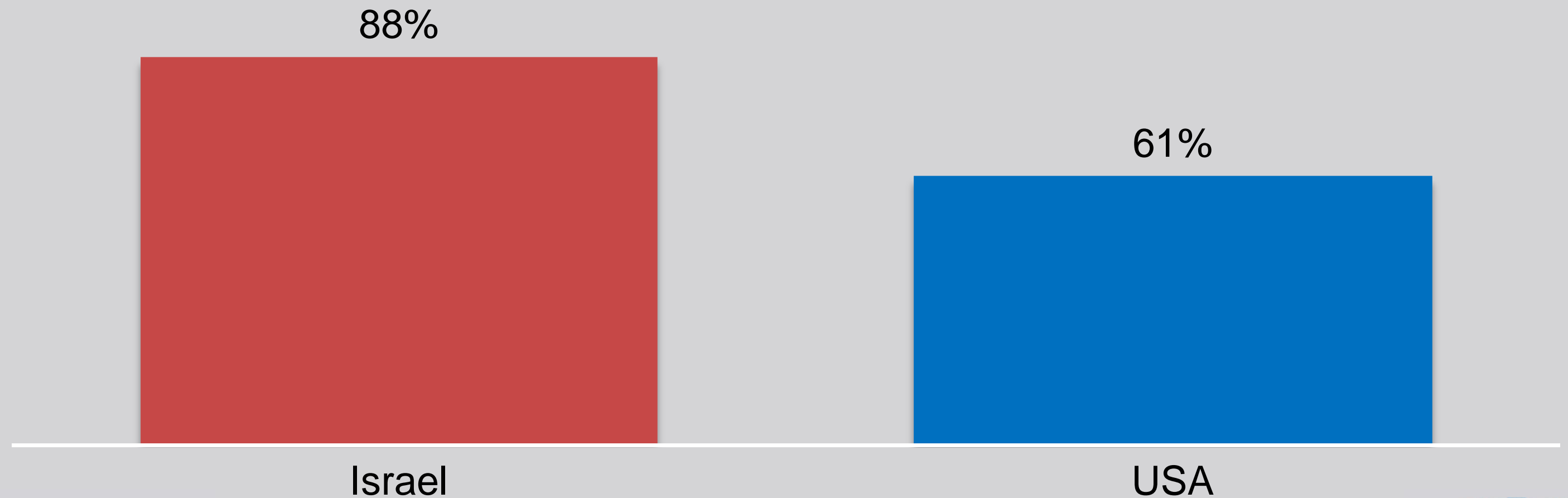
Israel



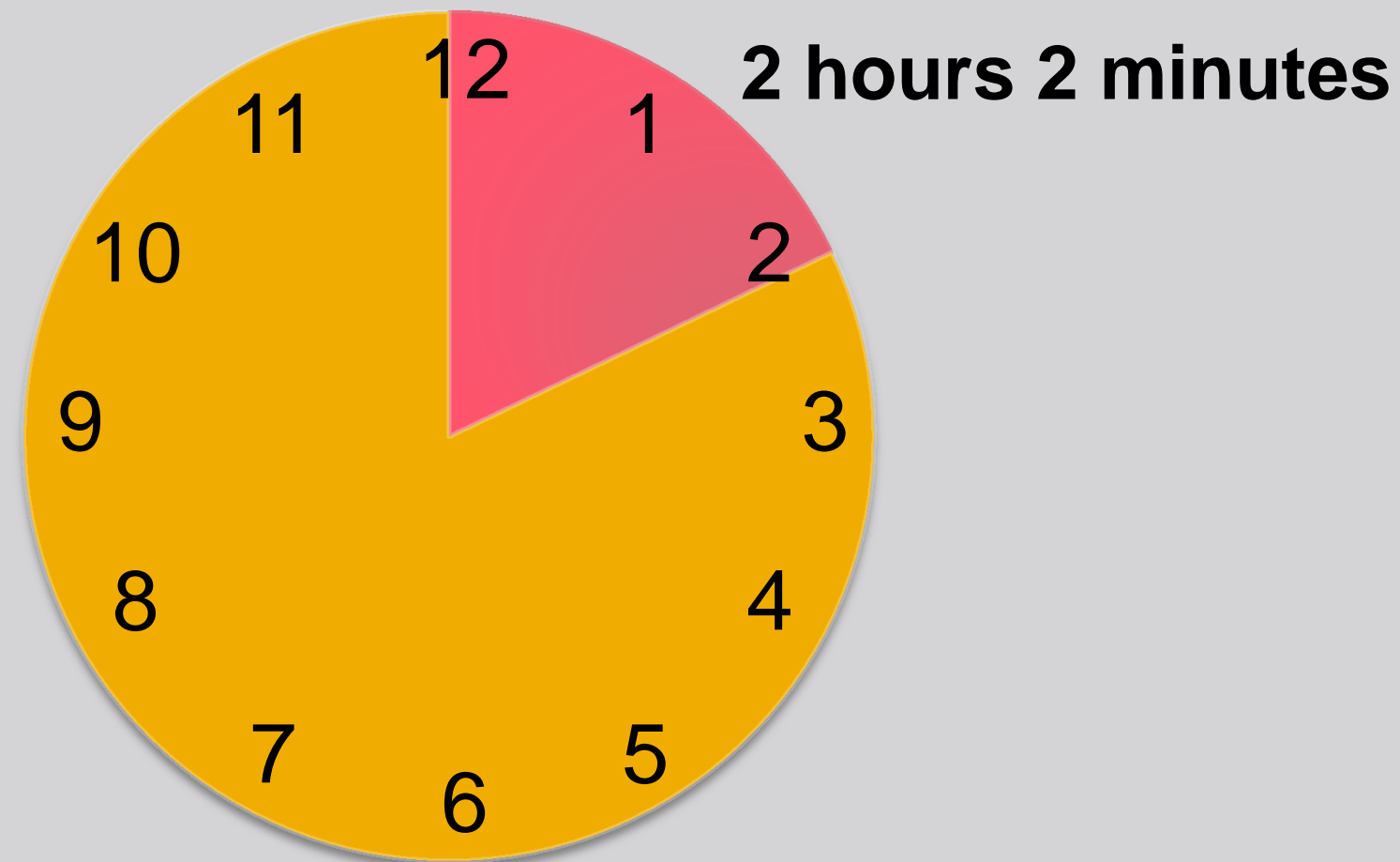
USA



# % Who Have Watched Videos over the Internet



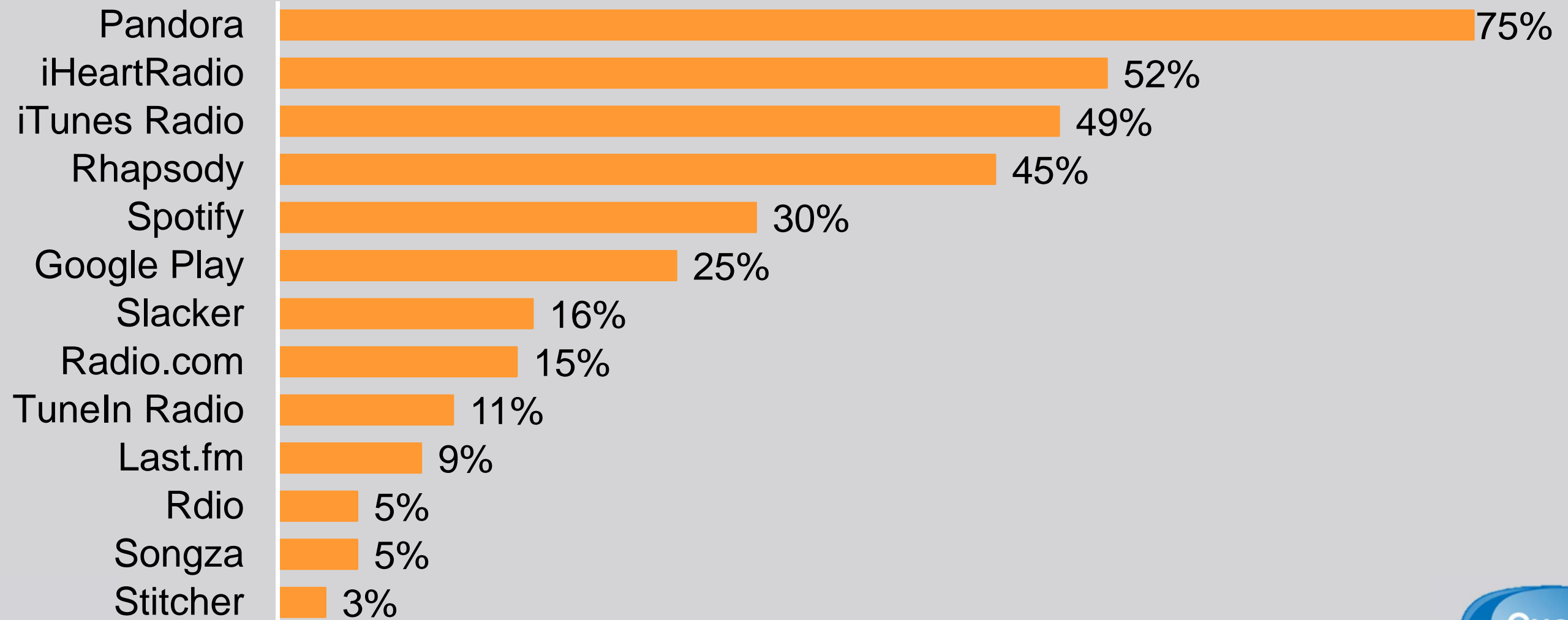
# Average Time Israelis Spent Watching Videos on the Internet in Past Week



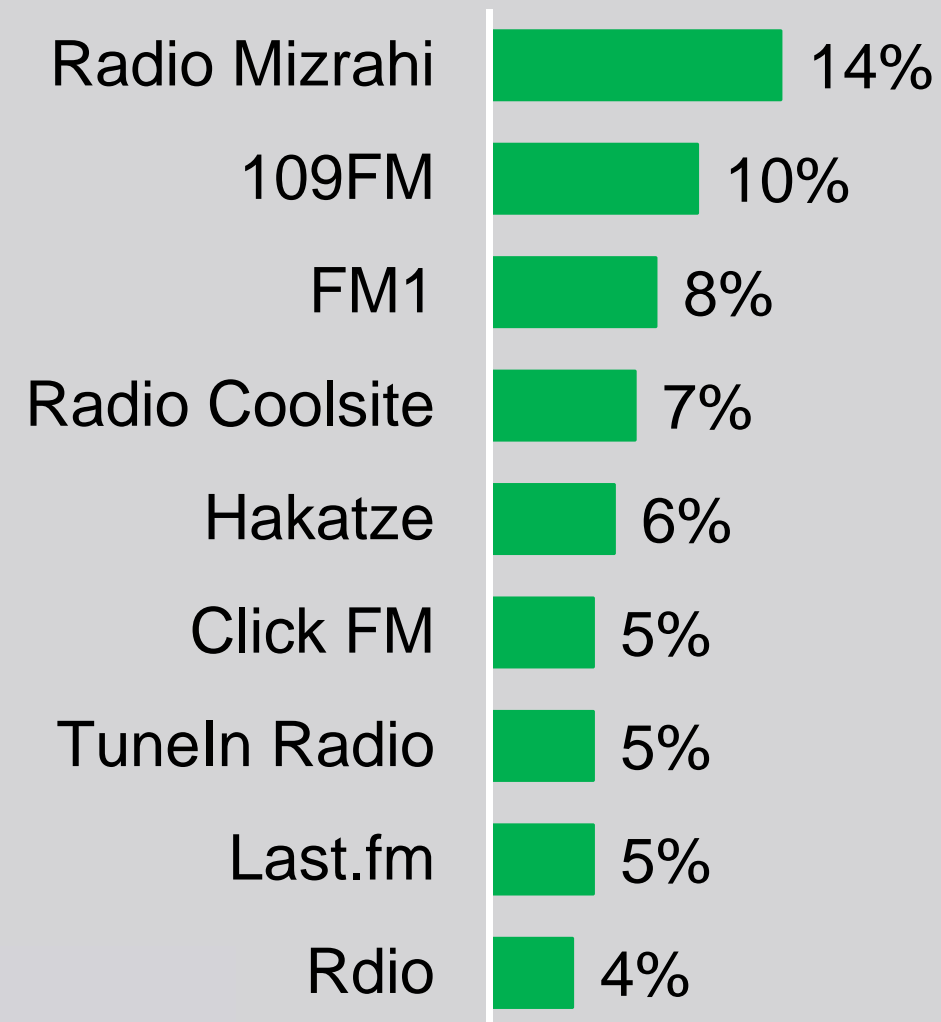
# Smartphone Penetration: As high or higher in Israel than in USA

# Internet Radio – Why has it taken off in the USA and not as much in Israel?

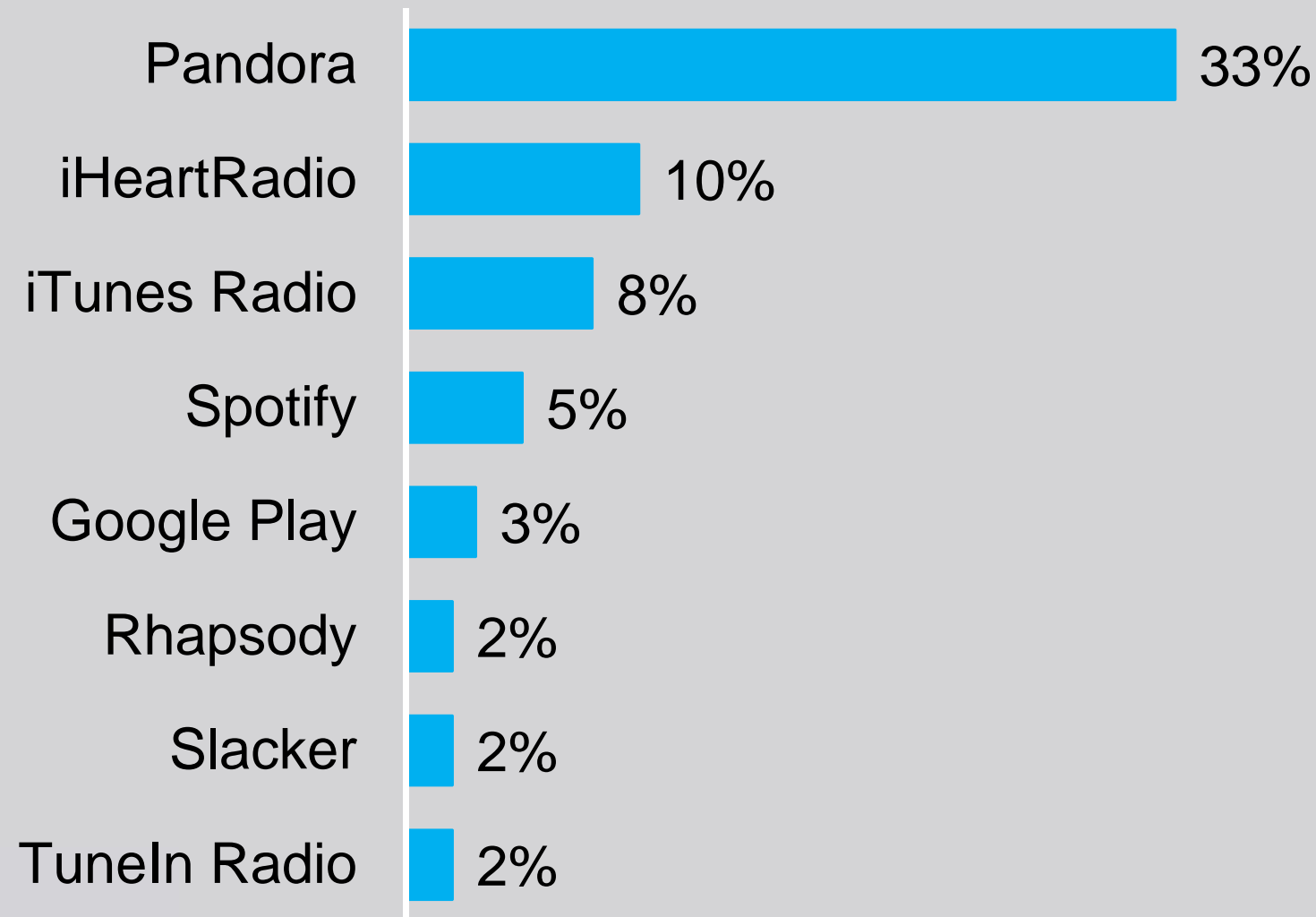
# % of USA Population Aware of...



# % of **Israel** Population Aware of Online Radio or Website

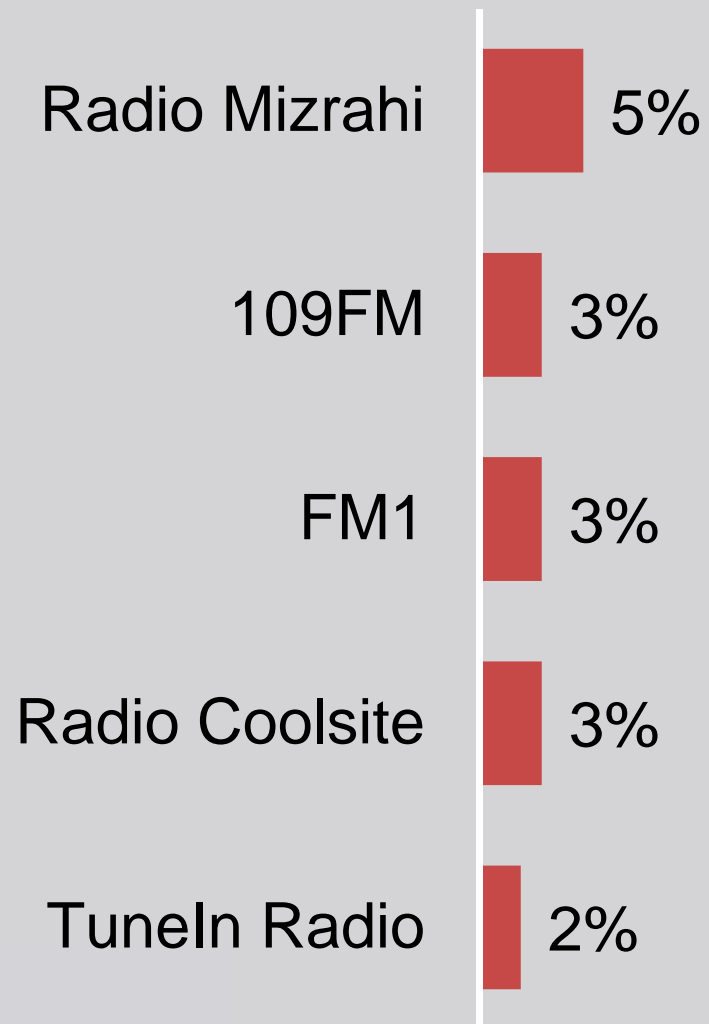


# % of **USA** Population Who Listened in Last Month to...



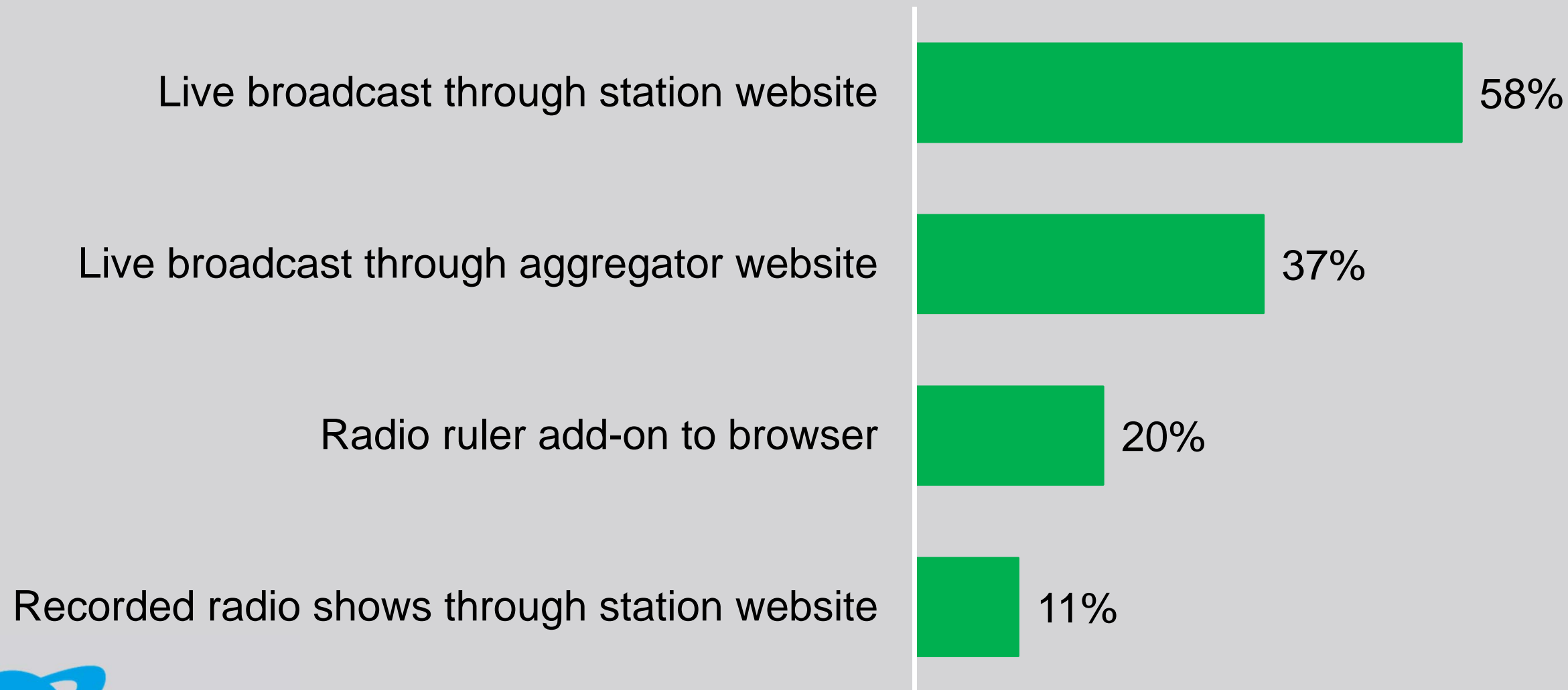
Brands lower than 2% Age 12+ not shown

# % of **Israel** Population Who Listened Online in Last Month to...



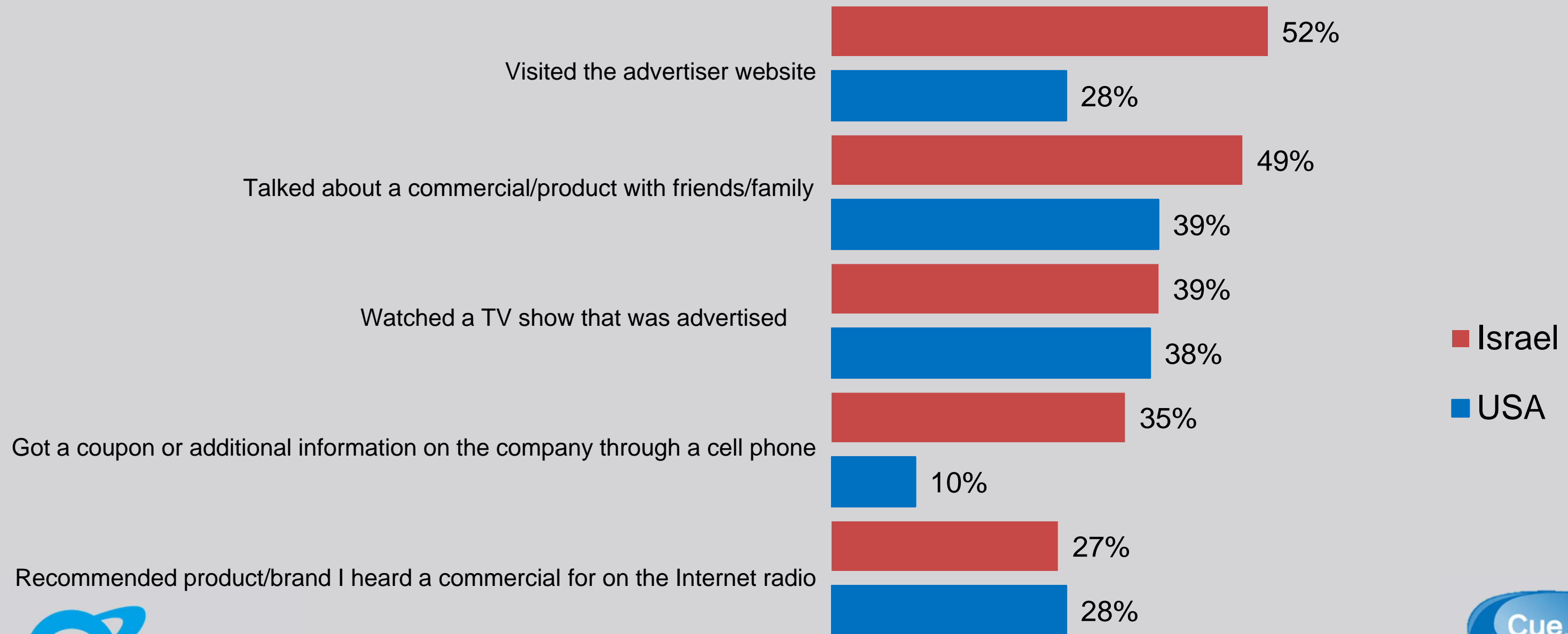
# Which ways do you listen to radio broadcasts over the Internet?

% of Israeli Online Radio Listeners Who Listen via...



# After hearing a radio advertisement, have you ever...?

% Saying Yes



**Where will  
this go?**



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# Internet Delivered Radio/Audio WILL Surely Continue to Grow in Israel

- Will it be from:
  - An Israeli entrepreneur?
  - Apple? Google?
  - Pandora?
  - Your broadcasters?
- All?
- And what innovations in this space can high-tech Israel bring to the world that Silicon Valley and others haven't thought of yet?



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