

The Pew Research Center's Project for Excellence in Journalism

The State of the News Media 2012

An Annual Report on American Journalism

Audio: By the Numbers

By Laura Houston Santhanam, Amy Mitchell and Tom Rosenstiel of PEJ

"By the Numbers" houses a comprehensive set of charts and tables telling the story of each media sector.

Audience

The vast majority of Americans still report listening to AM/FM radio weekly. But, as many as 40% percent of Americans now listen to audio on digital devices, and that is projected to double by 2015, while interest in traditional radio—even the HD option—is on the decline. One of the prime arenas for digital listening was the car, once the domain of AM/FM radio.

By the most basic measure, traditional AM/FM radio's has retained a place in people's lives. The vast majority of Americans use or own an AM/FM radio, and at a level that has remained largely unchanged over the last 10 years.

Terrestrial Radio's Use Has Remained Nearly Static Over the Last Decade

Percentage of Americans Age 12 or Older Who Use or Own a Platform or Device

	2001	2009	2010	2011
Television	98%	N/A	98%	98%
Local AM/FM Radio	96	92	92	93
Cellphone	54	81	84	84
Broadband Internet	20	N/A	64	70
Online Radio	28	49	52	56
Online Video	23	N/A	49	54
Facebook*	N/A	N/A	48	51
YouTube	N/A	N/A	46	49
Digital Video Recorder	N/A	N/A	41	36
Video on Demand	20	N/A	N/A	35
iPod	N/A	28	28	31
Smartphone	N/A	N/A	N/A	31
Audio Podcasts	N/A	22	23	25

Source: Arbitron

Note: Infinite Dial 2011 asked "Social Networking Sites," not Facebook. In previous years, respondents had been asked if they used social networking sites.

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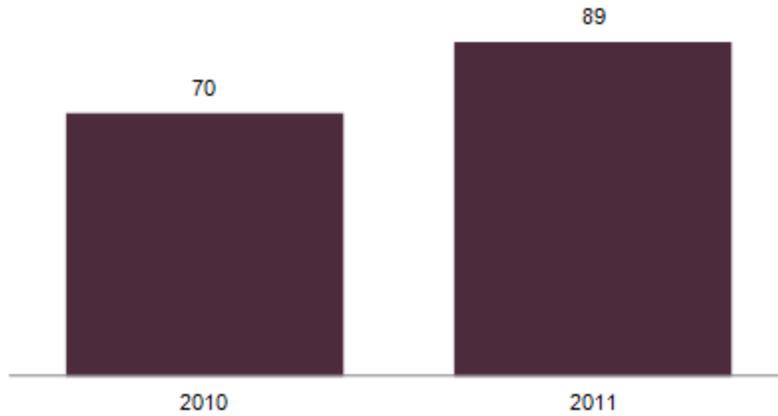
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The growth and momentum, however, lies in digital-only listening.

More people are listening to online audio services. In 2011, one-third of all Americans (34%), or 89 million people, said they listened to either streaming of AM/FM stations, Internet-only services, such as Pandora, or both in the previous month.

More People Are Turning to Online Radio

In Millions of Americans Estimated to Have Listened to Online Audio Services in the Past Month



Source: Arbitron

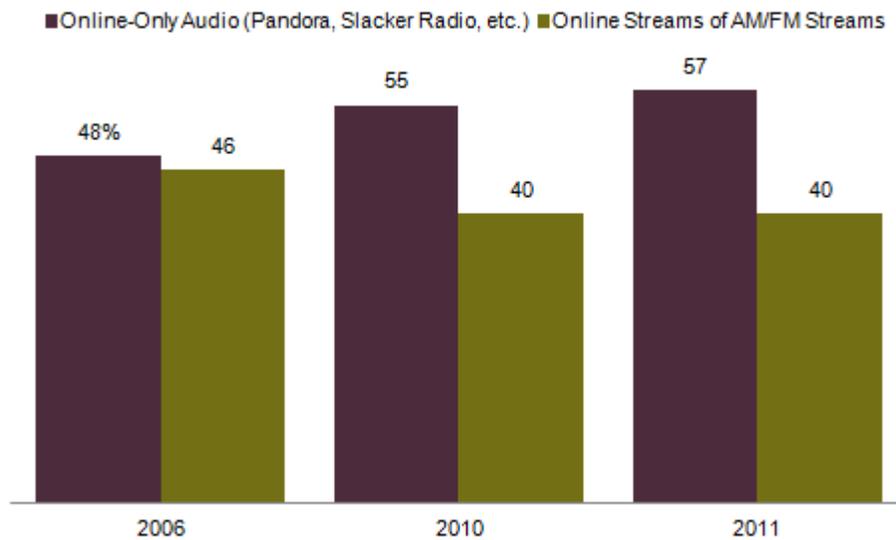
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Among those who listen to both AM/FM streaming and Internet-only services, 9% of Americans in all, a growing number of people say they listen to Internet-only services the most.

Those Who Listen Mostly to Internet-Only Stations Continues to Rise

Percentage of People Who Listen to Both AM/FM Streaming and Internet Only Audio



Source: Arbitron

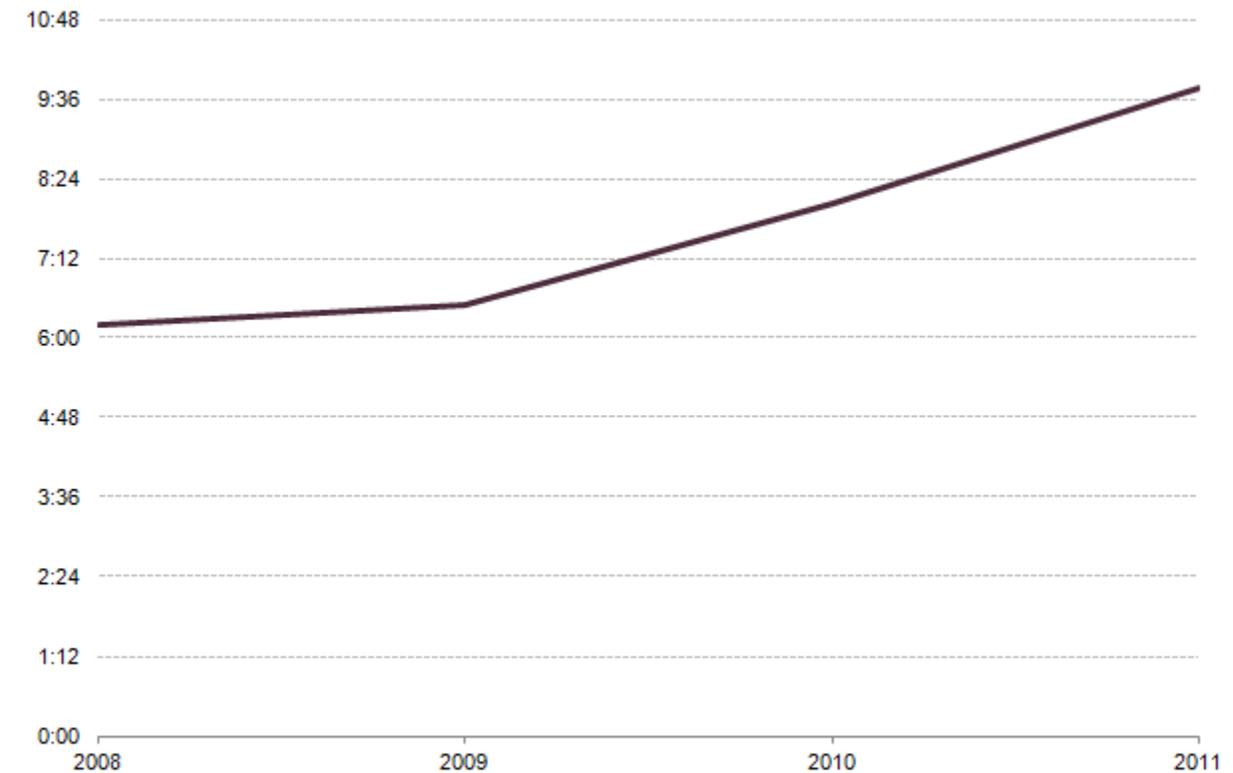
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Since 2009, the amount of time people spend listening to online audio has climbed. From 6 minutes, 13 seconds on average in 2008, it grew to 9 minutes, 47 seconds in 2011.

People Are Spending More Time with Online Radio since 2008

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



Source: Arbitron

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There is also clear affection for these newer forms of audio listening. Three out of four people say they like or love satellite audio, the same number of people who said that they like or love Pandora. Meanwhile, 69% of people said they like or love AM/FM broadcast radio. Still, online audio in general received less enthusiasm (53% liking or loving it generally). Portable devices such as the iPhone, iPod and iPad inspired the greatest affection.

One Out of Five Americans Say They 'Love' AM/FM Radio

Percentage of Americans Age 12 or Older Who 'Like' or 'Love' a Platform or Device

	2011		2010
	Love	Like	Big Impact (By comparison)
iPhone	66%	19%	45%
iPad	53	30	N/A
Android Smartphone	49	23	N/A
Digital Video Recorder	48	29	27
Smartphone	48	33	33
Broadband Internet	46	34	49
iPod	46	38	27
eReader	45	33	24
Satellite Radio	39	36	27
BlackBerry	36	33	44
Pandora	32	43	N/A
Cellphone (all)	28	32	54
Facebook	27	39	N/A*
Television	26	47	34
YouTube	24	44	13
Video on Demand	23	43	N/A
Local AM/FM Radio	22	47	22
Online Radio	14	39	8
Audio Podcasts	9	32	6
Video Podcasts	7	29	4

Source: Arbitron

Note: In 2010, Arbitron and Edison Research asked if "social networking web sites" had a big impact on respondents' lives, with 20% saying they did. In 2011, respondents were asked if they loved or liked specific social networking websites, including Facebook, MySpace and LinkedIn.

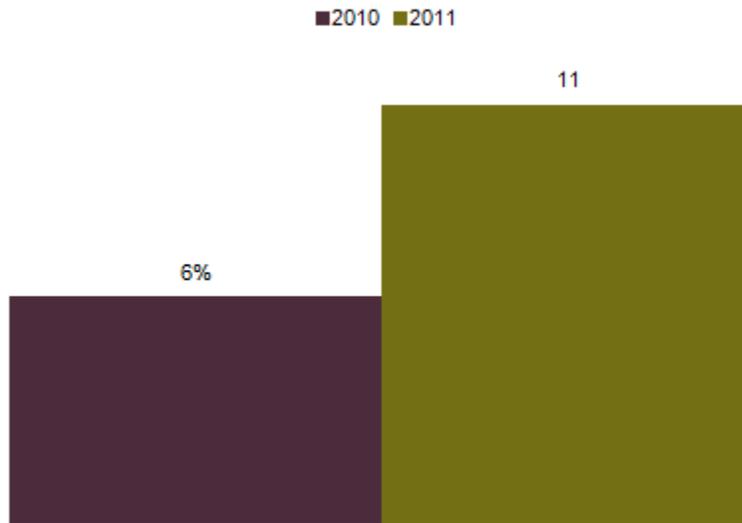
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One of the more interesting trends evident in 2011 is the use of smartphones to bring online audio into cars. Use nearly doubled in 2011, and with smartphone ownership projected to eclipse that of personal computers in 2012, online audio may stand the chance of competing even more with AM/FM broadcast radio.

More People Are Using Cellphones to Listen to Online Radio in Their Cars

Percentage of Cellphone Owners Who Have Listened to Online Audio in a Car by Listening to the Stream from a Cellphone Connected to a Car Stereo



Source: Arbitron

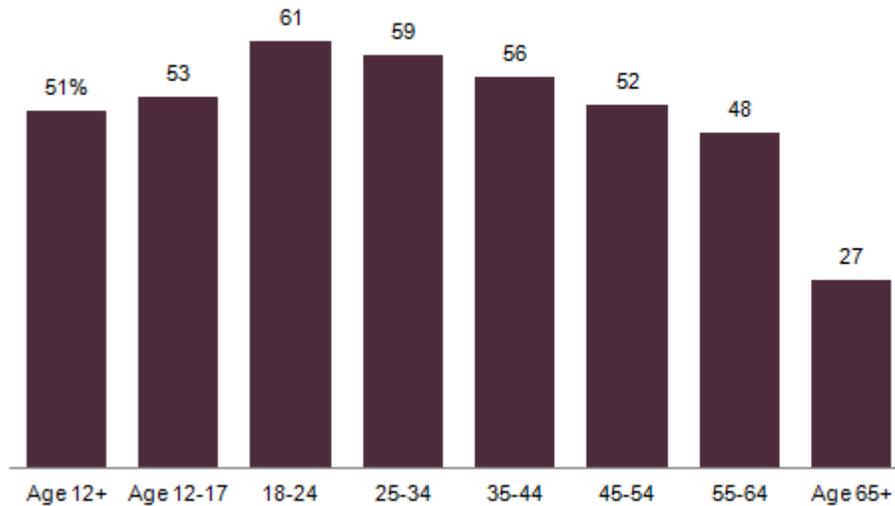
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HD Radio

In addition to streaming their broadcasts over the internet, broadcasters have also developed HD digital radio, which allows stations to add new channels aimed at niche audiences with higher-quality sound. According to the latest data, though, the evidence is growing that HD is failing to take hold. Most people are aware that HD radio exists, but very few adults express interest in it. From 2006 to 2010, the number of people who said they were interested in HD radio never rose above 8%.

Most People Are Aware of HD Radio

Percentage of People Who Have Heard of HD Radio in 2011 by Age Group



Source: Arbitron

Note: In 2011, Arbitron asked for "percent of people who have heard of HD Radio by age group." In previous years dating back to 2006, Arbitron asked for "percent of people who have heard/read anything recently about HD Radio."

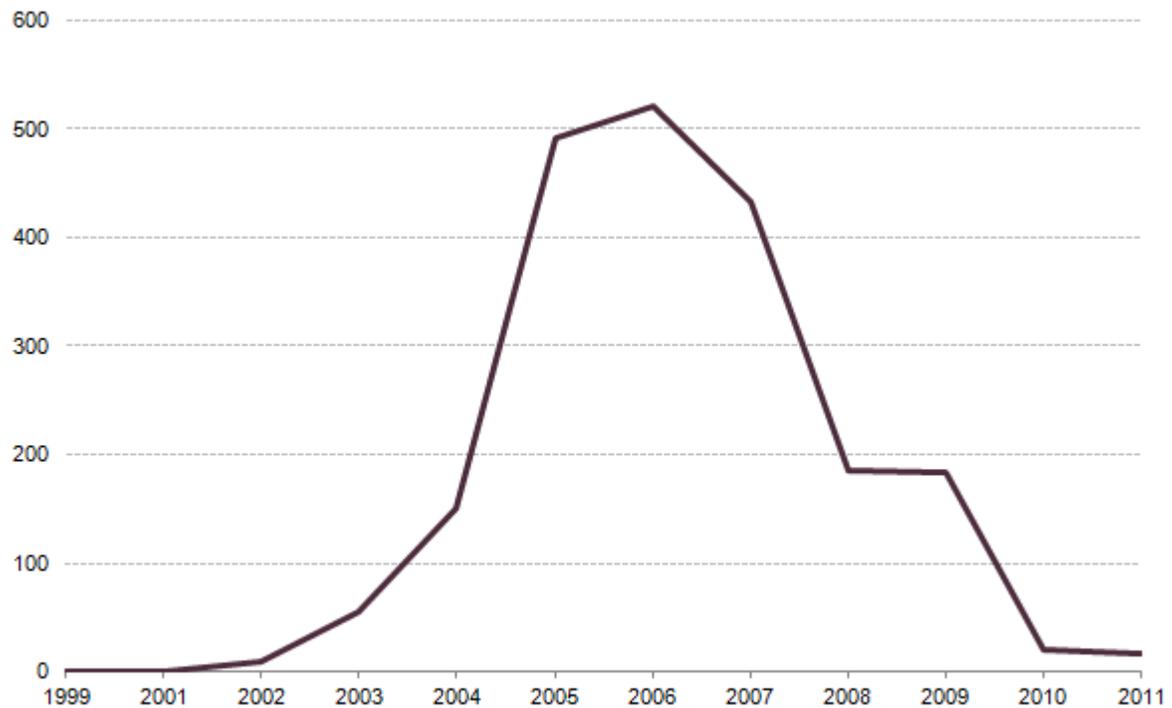
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The number of stations that added HD declined in 2011, continuing the trend first seen in 2006.

According to BIA Financial Network data and analysis from the Project for Excellence in Journalism, only 17 stations added HD signals in 2011, for a total of 2,103 stations.

Number of Stations Converting to HD Falls Again in 2011

Number of Stations in December 2011



Source: BIA Financial Network and PEJ Research

Note: PEJ has updated figures from 2003 forward to reflect changes in the BIA system regarding what year stations went digital in the past.

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Radio Economics

The economics of audio, by contrast, still tilt heavily in the direction of traditional radio broadcasting. As in other media sectors, this has been the innovator's problem of trying to invest in new technology when the old continues to generate the most revenue.

Over all, radio revenues increased by about 1 percentage point to \$17.4 billion in 2011, according to data from the Radio Advertising Bureau. This was far less than the 6% revenue growth in 2010. That, however, was when radio revenues had more ground to regain after the recession took its toll.

Radio Revenue Sources in 2011

In Millions of Dollars

	Dollars	% Change over 2010	% of Total Radio Revenue
Spot	\$14,060	-1%	81%
Network	1,136	3	7
Digital	709	15	4
Off-Air	1,491	7	9
Total	17,396	1	100*

Source: Radio Advertising Bureau Quarterly Revenue Reports

Note: Percent of total radio revenue does not add up to 100% due to rounding.

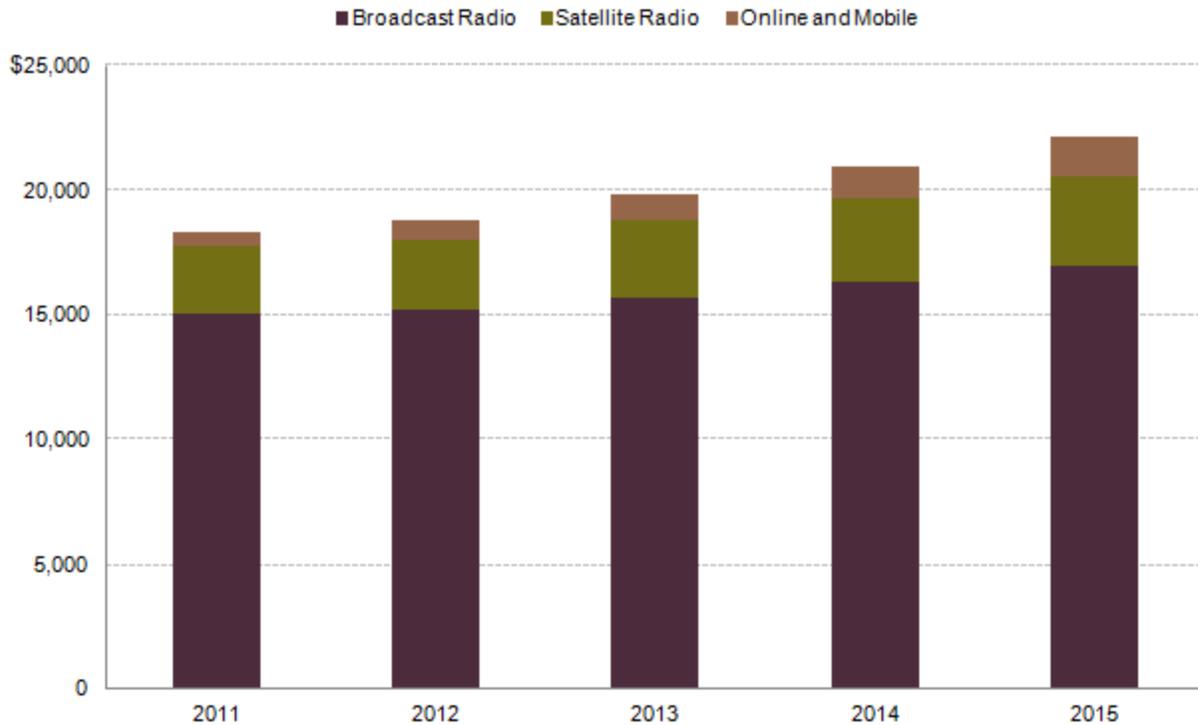
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In 2011, total radio revenue grew, but to a lesser degree than the year before. And spot advertising, which dominates radio broadcast revenue, was flat. In contrast, digital platform spending, the smallest piece of the pie, is projected to have the steepest upward growth trend. Just as we see in audience trends, then, the challenge will be who will capture that digital market share.

Online and Mobile Radio Expected to See Richest Revenue Gains

In Millions of Dollars



Source: Veronis Suhler Stevenson Communications Industry Forecast 25th Edition, 2011 – 2015

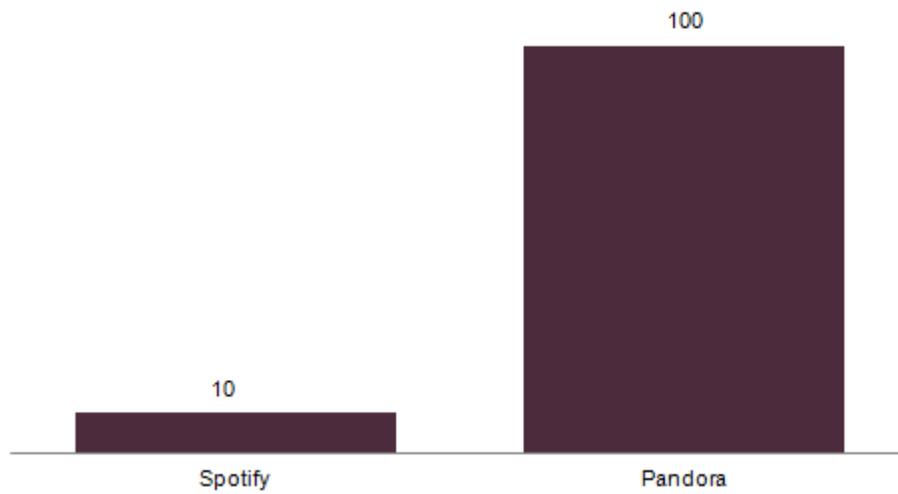
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A Big Year for Internet Audio Services

Internet audio services, such as Pandora, SlackerRadio and Spotify, saw important developments in 2011. Along with more people tuning in to internet audio, Pandora Media made an initial public offering of its stock and a new competitor, Spotify, made its debut in the U.S. While Pandora and Spotify are not the sole competitors in online-only audio, they have an established presence and brands that makes them increasingly recognizable. For all the growth in audience, however, a sustainable business model has yet to fully emerge.

U.S. Audience for Pandora Far Outweighs that of Spotify's International Reach for Now

In Millions of Registered Users as of July 2011



Source: Pandora press release, July 12, 2011, and Spotify homepage.

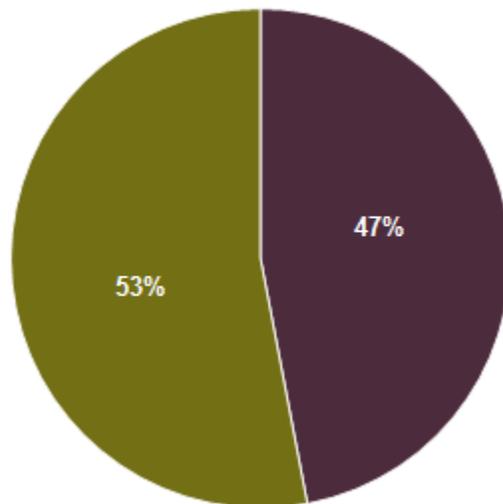
Note: Pandora's number of registered users is for U.S. audience only while Spotify's number of registered users is worldwide.

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Nearly half of all Americans have heard of Pandora.

Percent of Americans Who Have Heard of Pandora Compared to Those Who Have Not

■ Have Heard of Pandora ■ Have Not Heard of Pandora



Source: Arbitron

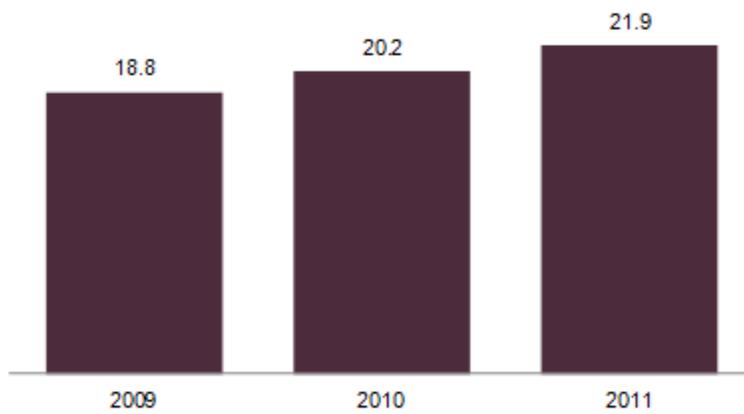
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Satellite Radio

The first of the major challengers to AM/FM, satellite radio saw audience and revenue grow in 2011. The U.S. satellite radio industry is now a single company, SiriusXM. The company reported attracting new subscribers in 2011, but some are not happy with the company's recent announcement of higher subscription charges.

SiriusXM Continues to Attract More Subscribers

In Millions of Subscribers



Source: Arbitron

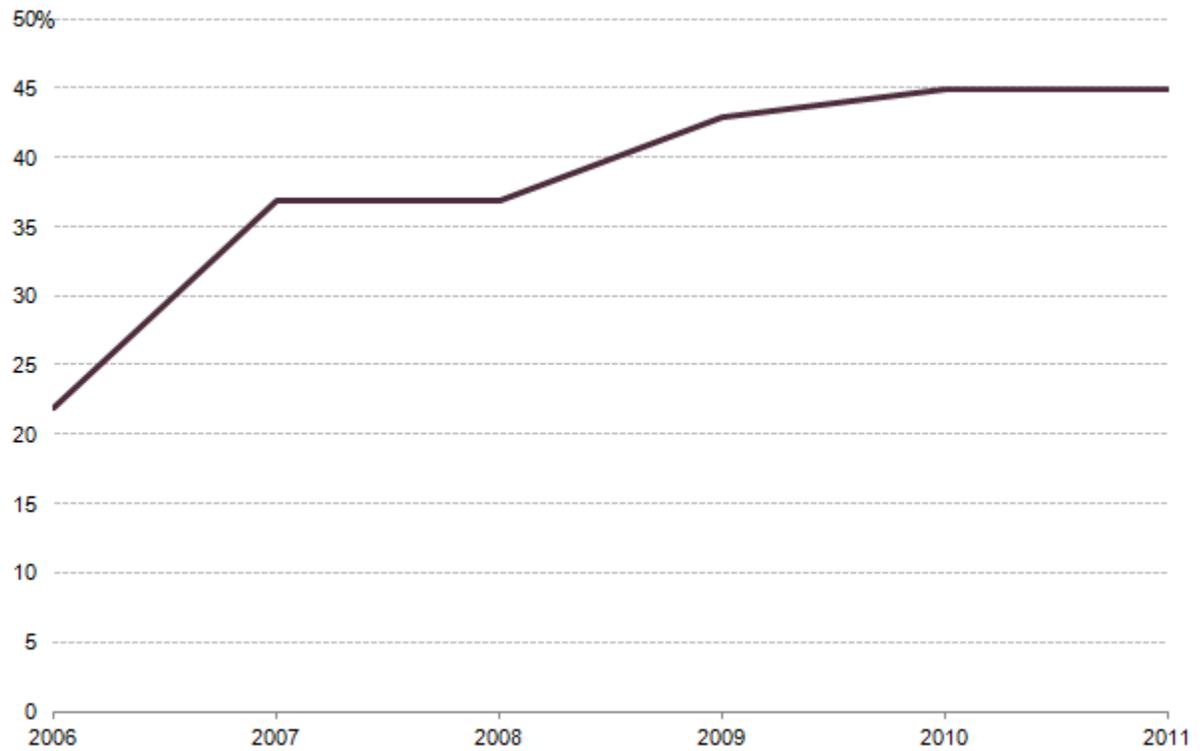
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Podcasting

The use of podcasting hit a plateau in 2007, and has largely stayed there since. As of 2011, 45% of Americans report knowing what a podcast is, about on par with awareness levels since 2007.

Awareness of Audio Podcasting Has Stalled

Percentage of People Aware of Audio Podcasting



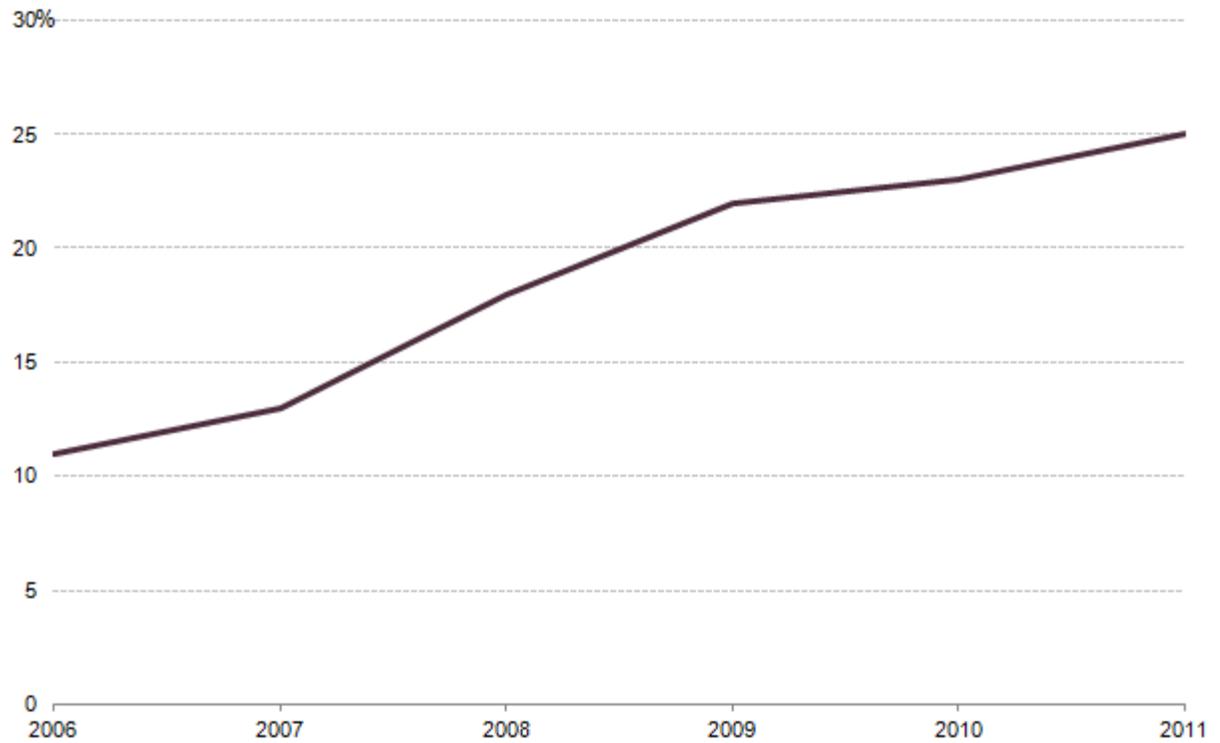
Source: Arbitron

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Just one-quarter of Americans, though, reported listening to podcasts in 2011, compared to 23% during the previous year. Only 9% of people reported that they "love" podcasts, according to Arbitron's data.¹

Podcast Audience Growth Sees Little Change in 2011

Percentage of Americans Who Have Listened to a Podcast



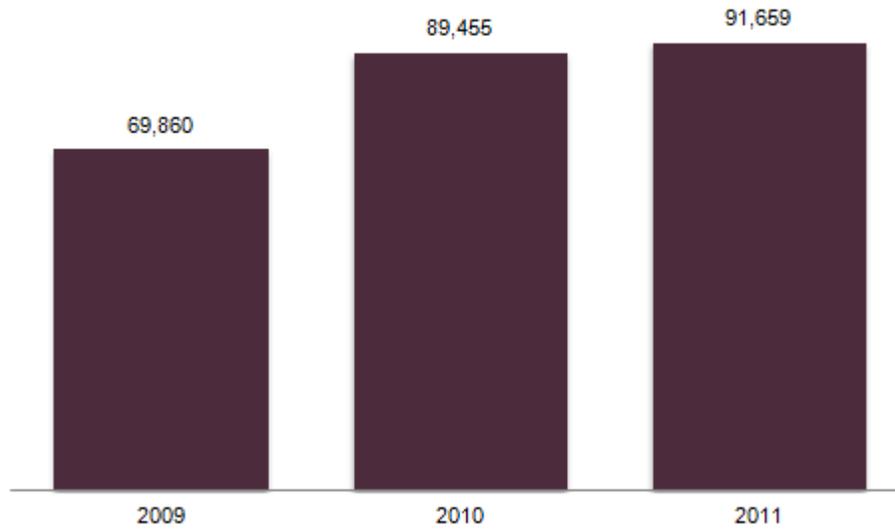
Source: Arbitron

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The volume of podcasts was also fairly steady at more than 91,000 in 2011, compared to nearly 90,000 the year before, according to PodcastAlley.com.

Total Number of Podcasts Produced Remained Steady in 2011

Number of Podcasts



Source: PodcastAlley.com

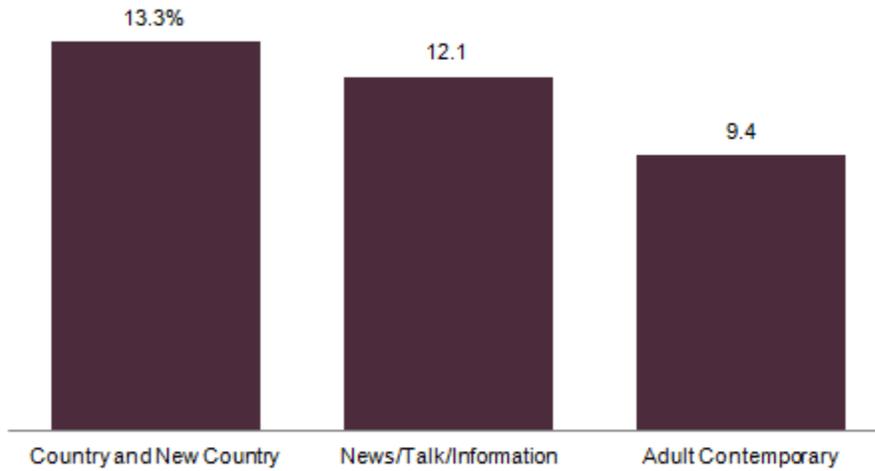
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News Radio

Where does news fit into the audio landscape? News/Talk/Information (most of which is syndicated talk shows) remains one of the most popular broadcast radio formats among Americans, second only to country music. Nearly 59 million listeners tuned into news/talk/information stations in Fall 2010, according to Arbitron.

News/Talk/Information Ranks Second Only to Country Music in Audience Share

Percentage of Population Age 12 or Older in Fall 2010



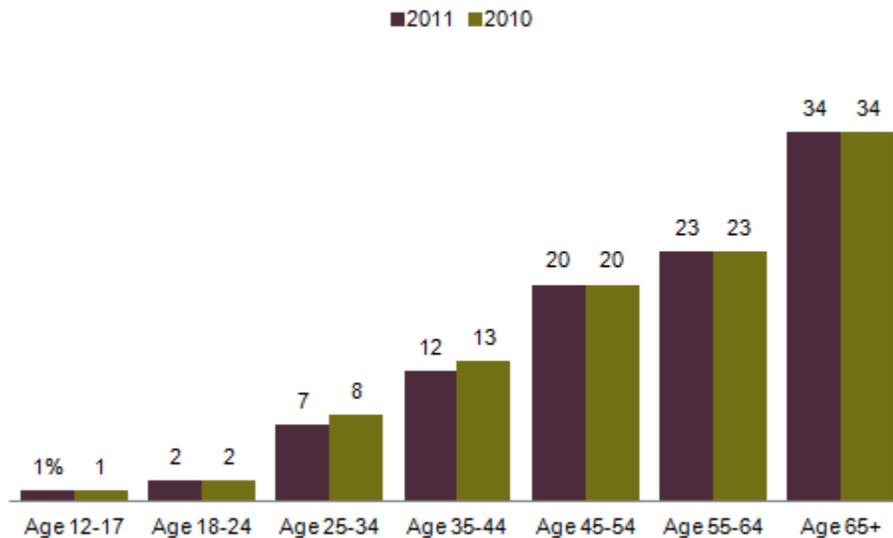
Source: Arbitron

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Older listeners make up the biggest cohort of news/talk/information's audience of more than 58 million people.

Older Listeners Make Up One-Third of News/Talk/Information Audiences

Percentage of all News/Talk Information Listeners, by Age Group



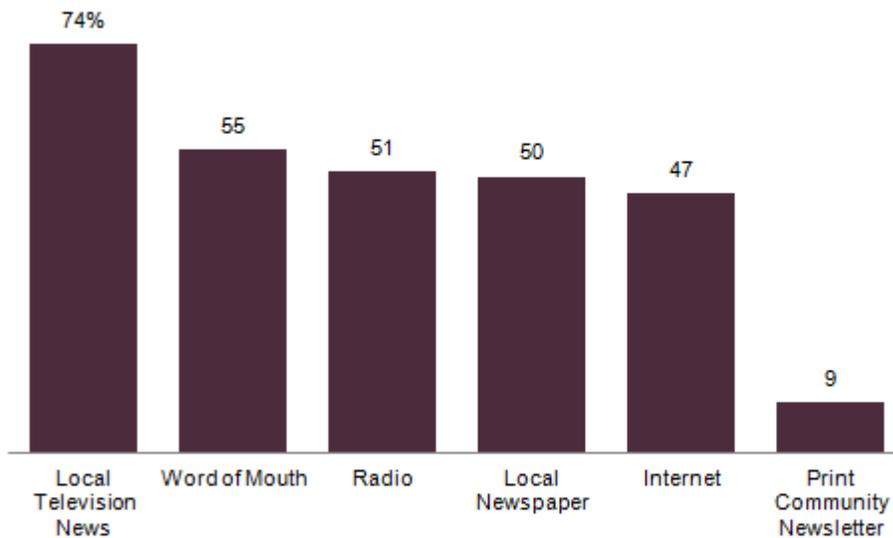
Source: Arbitron

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Listening to a radio broadcast or logging onto a radio website is the way 51% of Americans say they get their local news, according to a survey from Pew Research Center's Internet and American Life Project and the John S. and James L. Knight Foundation. The medium falls behind local television news (74%) and word-of-mouth (55%). Most often, adults between ages 30-65 turn to local radio.

Half of Americans Get Local News from the Radio

Percentage of Americans, Age 18 or Older



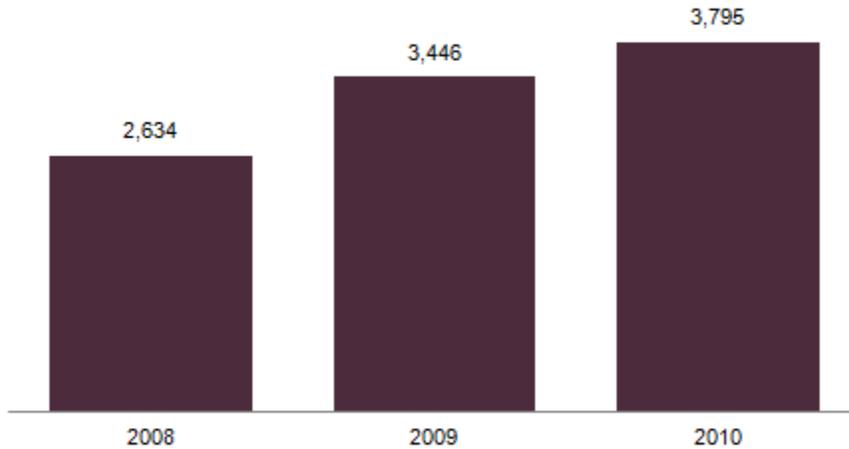
Source: Project for Excellence in Journalism, Pew Research Center's Internet and American Life Project and the John S. and James L. Knight Foundation

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Although people generally are not spending as much time listening to news/talk/information as they once did, the number of news/talk/information stations grew in 2010, the last year for which data are available. With the 2012 presidential election under way, station growth is expected to continue, and listening may increase.

News/Talk/Information Radio Stations Continue to Increase

Number of Stations



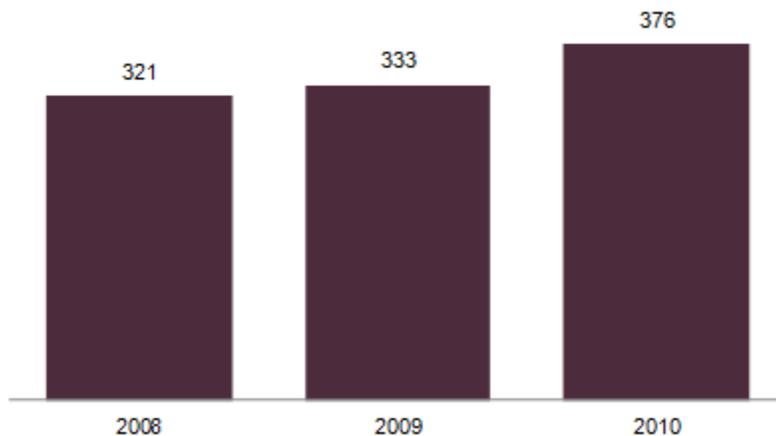
Source: Arbitron

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Public news/talk radio dominates traditional public (noncommercial) radio. It attracts 47% of all public radio listeners, far outpacing classical, jazz and other public radio formats. Overall, 2% of the population tunes in to public radio every week. Across all age groups, these listeners are more likely to be men than women.

Public News/Talk Stations Up 21% since 2008

Number of Stations



Source: Arbitron

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NPR

In 2011, NPR underwent a year of upheaval. Key members of its upper management left or were fired. NPR was the focus of threats from Republicans in Congress about federal funding, although the cuts were not passed in the Senate. In the end, fewer people listened each week to NPR in 2011, though the number of member stations increased, as did NPR's total operating budget.

NPR Lost Listeners but...

Number of Average Weekly Listeners

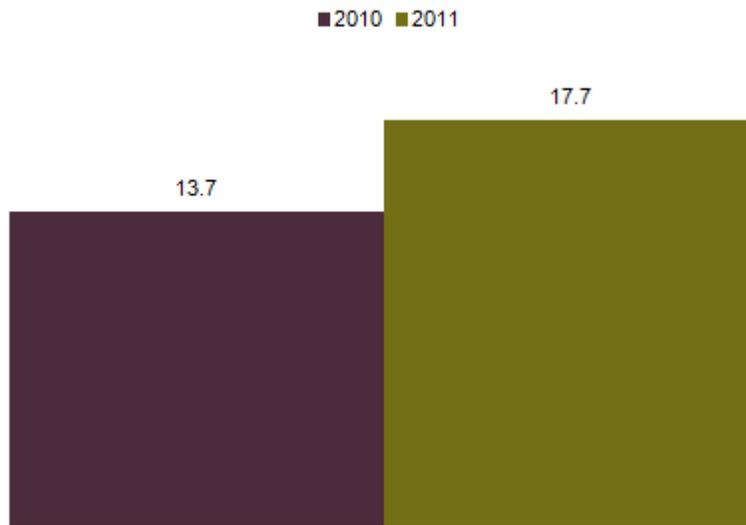


Source: NPR provided PEJ with internal data

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The Organization Saw Greater Website Traffic in 2011

In Millions of Unique Visitors to NPR.org



Source: NPR Marketing and Communications

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Furthermore, NPR is making headway in reaching audiences on other platforms and devices, including Facebook and apps for iPads, iPods and Android.

Facebook Top 10 Fastest-Growing News Pages of 2011

Rank Based on Number of People Who Click 'Like' for Each Outlet's Facebook Page

1. CNN
2. Fox News
3. NPR
4. The Onion
5. New York Times
6. Al Jazeera
7. Yahoo News
8. Times of India
9. BBC World News
10. PBS

Source: Poynter Online

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Talk Radio Hosts

Michael Savage and Glenn Beck swapped standings in the broadcast talk radio world in 2011. Beck lost listeners on radio during the year in which he also lost his program on Fox News and started his own online cable outlet, Glenn Beck TV. The No. 1 spot continued to belong to Rush Limbaugh, whose audience is an estimated 15 million weekly listeners, a number unchanged from the year before. Sean Hannity maintained his spot as the second most listened-to talk radio host in the U.S., with 14 million weekly listeners.

Top Talk Radio Hosts: 2011 Compared to 2010

In Millions of Weekly Listeners

	2011 Listeners	2010 Listeners
Rush Limbaugh	15.0	15.0
Sean Hannity	14.0	14.0
Michael Savage	9.0	8.5
Glenn Beck	8.5	9.0
Mark Levin	8.5	8.5
Dave Ramsey	8.5	8.0
Neal Boortz	6.0	6.0
Laura Ingraham	6.0	6.0
Jim Bohannon	3.75	3.75
Jerry Doyle	3.75	3.75

Source: Talkers Magazine

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