

INTRODUCTION

MIDAS Autumn 2014

In today's connected environment radio has transformed into a truly anytime, anywhere, anyhow experience.



The MIDAS Survey is designed to provide context and insight into how when and where radio content is being consumed in this liberated environment.

With the increasing penetration of connected devices such as tablets and smartphones, MIDAS shows how listeners are embracing the multi-platform and multi-device offering, as well as how radio-on-demand is contributing to listening behaviour, in addition to showing the activities they are doing whilst listening, where they are listening, and who they are listening with.



LIVE RADIO



'Live Radio' listening hours are dominated by traditional AM/FM and DAB Radio sets (**Share AM/FM 49%, DAB with 35%**). Devices connected to the internet have a much smaller share of listening hours (**Desktop/Laptop 4%, Smartphone 3%, Digital Music player 0.2% and Tablet 0.3%**)

APPS



Radio Apps are popular amongst radio listeners. **19 million or 35% of the UK population** have downloaded a Radio App. **3.9 million (48%)** of 15-24 year olds and **4.7 million (57%)** of 25-34 year olds claim to have downloaded a Radio App. Almost half of all users who download a radio app use it on a weekly basis.

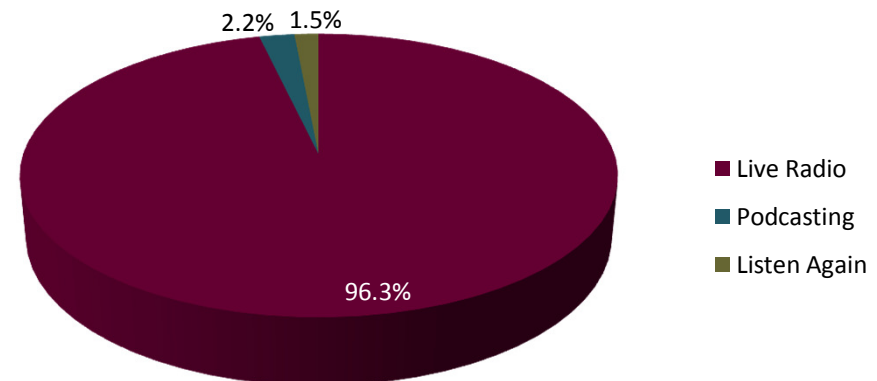
PODCASTING

The smartphone is the most popular way to listen to a Podcast, both for adults and young adults with a share of **47%** (Adults 15+) and **34%** (15-24 year olds). In terms of 'reach' **4.0 million** adults listen to a podcast whilst nearly two thirds of all podcasts downloaded are listened to (**65%**).

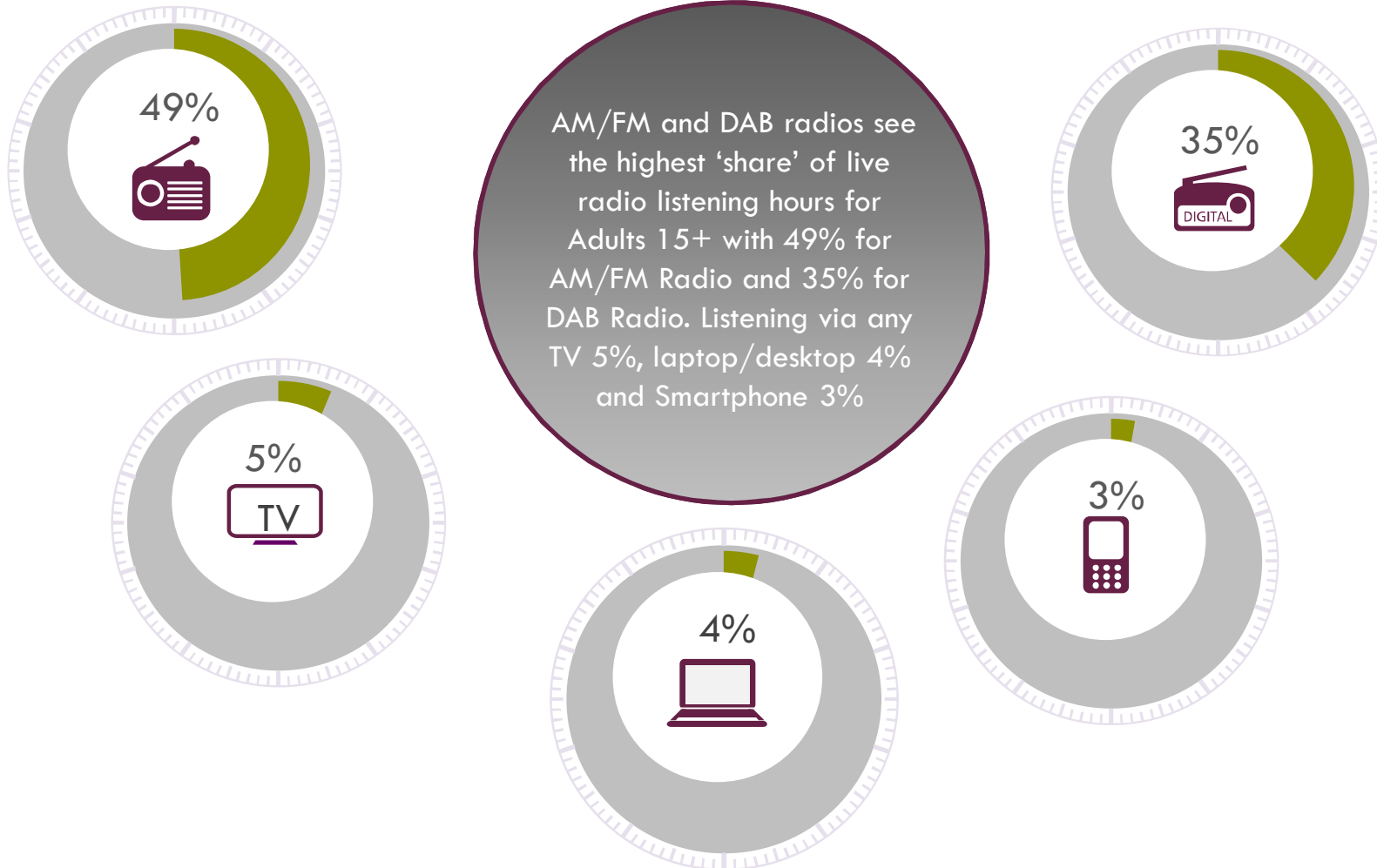
LISTEN AGAIN



3.5 million adults use the 'listen again' function. **84%** of these adults prefer to listen alone rather than with friends or colleagues. Desktops/Laptops are the device of choice with **36% share** of all 'listen again' listening hours.

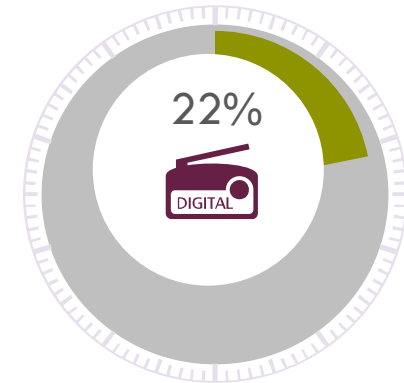
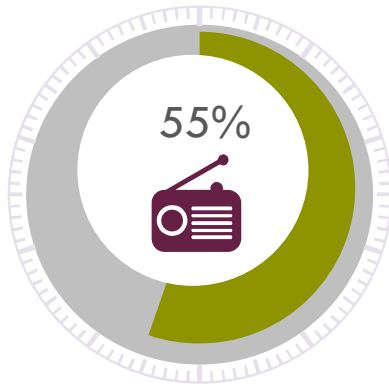


LIVE RADIO Listening by Device (Share %)

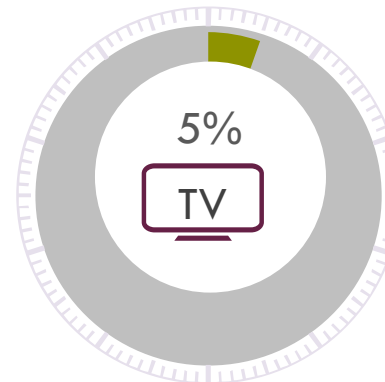
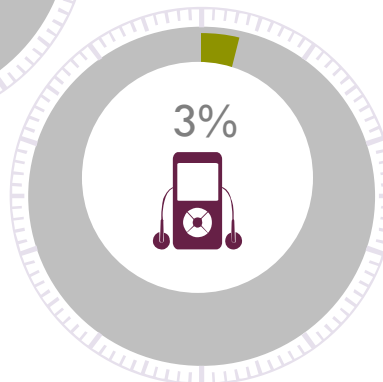
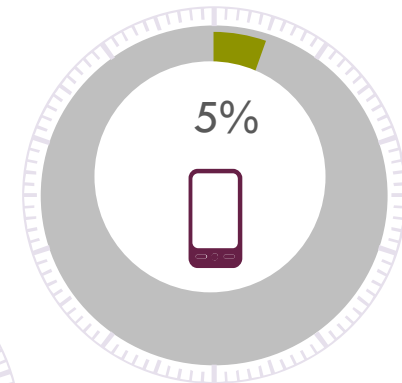
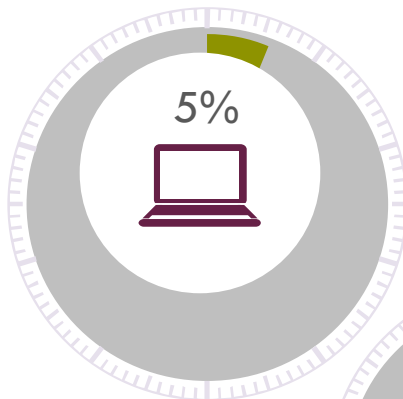


LIVE RADIO' by Device (SHARE %) 15-24 YEAR OLDS

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Amongst 15-24 year olds, AM/FM radio has the highest share with **55%** of listening hours, followed by DAB sets with **22%**. Connected devices such as Smartphones and Laptops/Desktops have a **5%** share, any TV **5%** and Digital Music player **3%**.

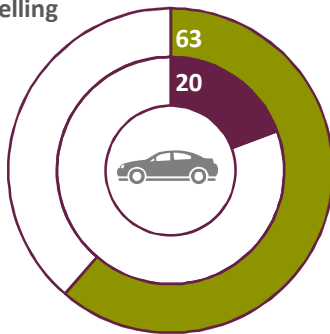


LIVE RADIO Listening by Activities (Reach and Share Adults 15+)

Amongst adults 15+ Working/Studying has the highest share of listening hours with **21%** followed by Driving/Travelling with **20%**, Relaxing or Doing nothing in particular **15%** and household chores **13%** also Cooking/Eating/Drinking has an **10%** share of the live radio listening hours.

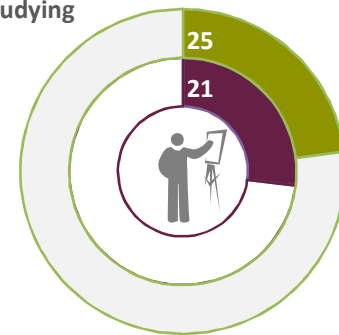
Driving/Travelling

■ Reach%
■ Share%



Working/Studying

■ Reach%
■ Share%



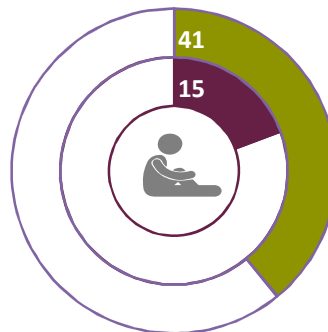
Household Chores

■ Reach%
■ Share%



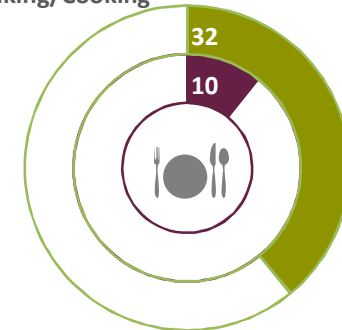
Relaxing

■ Reach%
■ Share%

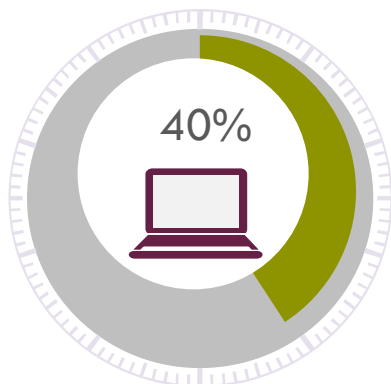


Eating/Drinking/Cooking

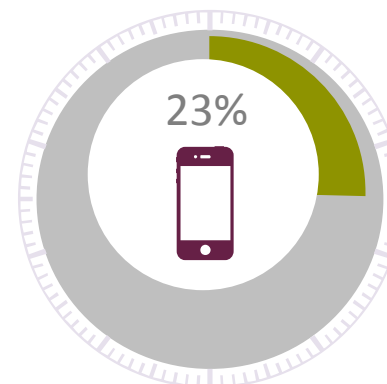
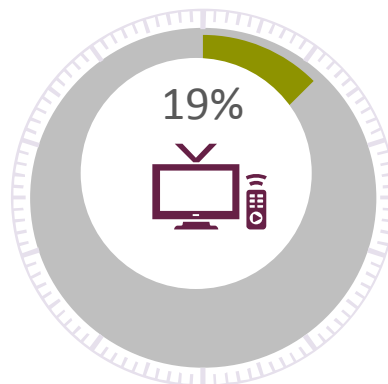
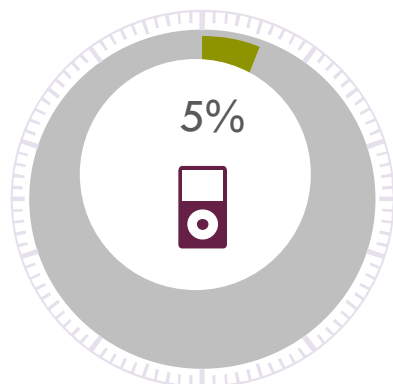
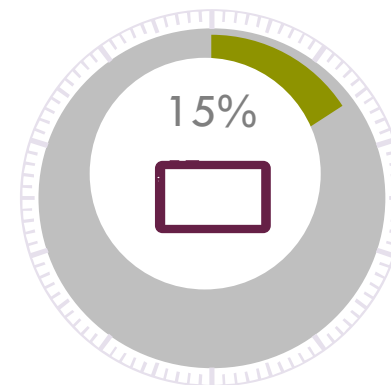
■ Reach%
■ Share%



'LISTEN AGAIN' by Device Reach% (Adults 15+)

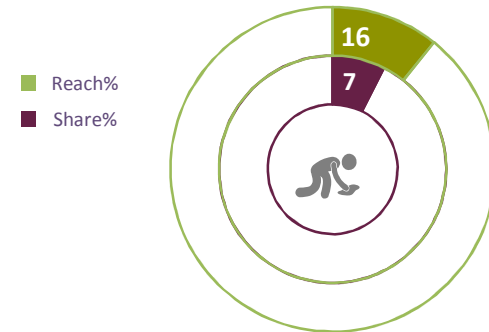
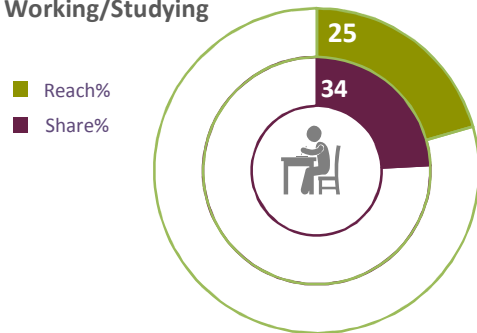


A Laptop or Desktop computer is the most popular device to listen to 'listen again' services with **40% Reach**. Smartphones have **23%**, Any TV **19%**, Tablets **15%** and Digital Music Players **5%**

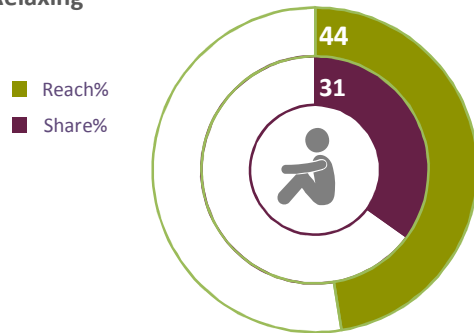


'LISTEN AGAIN' by Activity (Reach and Share %)

Working/Studying



Relaxing

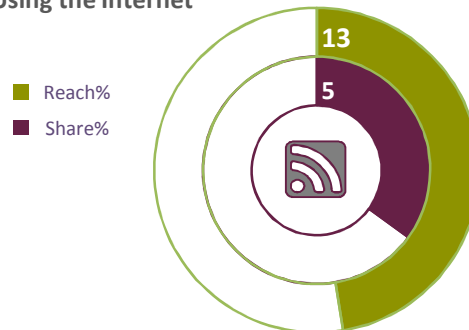


Eating/Drinking/Cooking

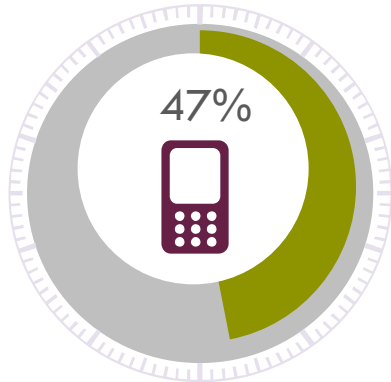


Relaxing or doing nothing in particular and Working/ Studying are the most popular activities whilst engaging in 'listen again' services with the highest reach and share of 'listen again' hours.

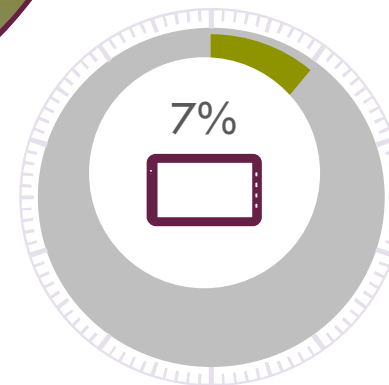
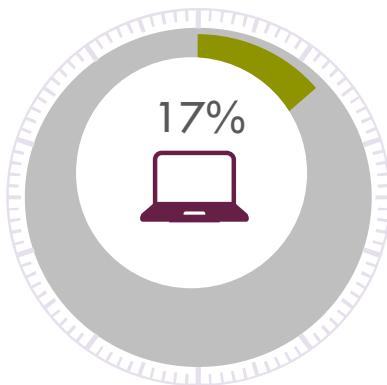
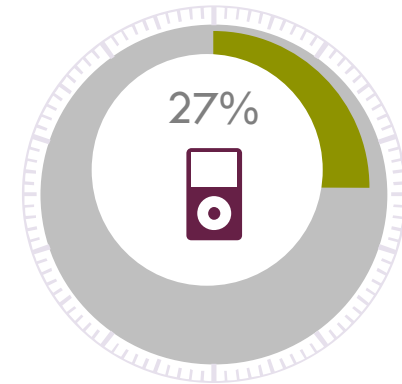
Using the Internet



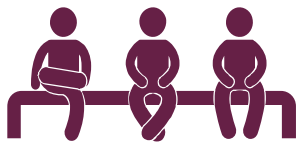
PODCASTS by Device (Share %)



The majority of Podcasts are listened to alone (90%) so naturally we see connected mobile devices being used more frequently - Smartphones with a 47% share of podcast listening hours, followed by Digital Music players with 27%, any Computer 17% and Tablets 7%



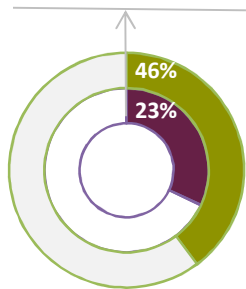
PODCASTS by Activity (Reach and Share %)



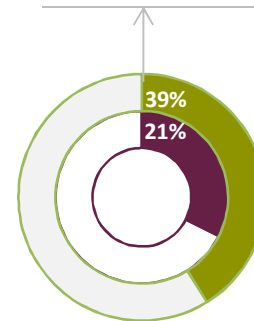
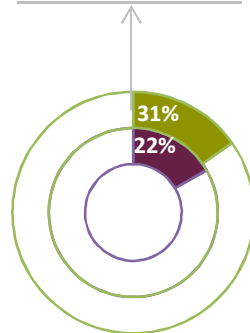
Working or Studying whilst listening to a Podcast has **31%** reach and **22%** share of listening hours.



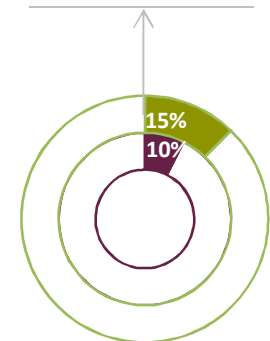
Household chores are also significant activities to undertake whilst listening to a Podcast. Chores represent an **10%** share of Podcast listening hours and has **15%** reach.



Relaxing or Doing nothing in particular has **46%** reach and almost a quarter of the share of Podcast listening hours with **23%**.



It appears Podcasts are a popular accompaniment on a journey . Driving or travelling has a reach of **39%** and **21%** share of Podcasting Hours.



Who people listened with?

58% live
radio listening hours
in adults are done
alone

73%
of 'Listen Again'
hours are listened to
by adults alone.

91%
of 'Podcasting' hours
are listened to by
adults alone.

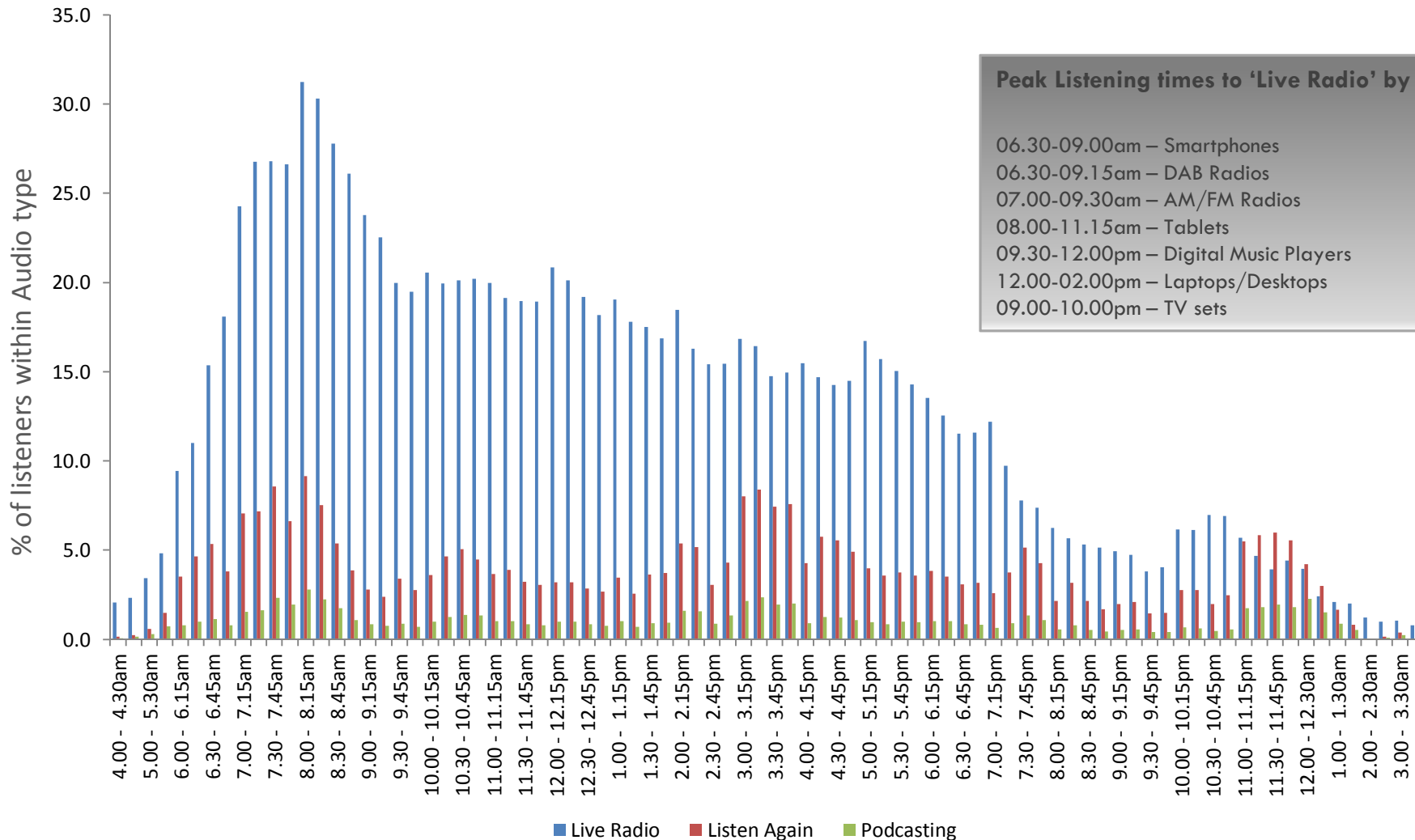
37%
of live radio listening
in 15-24 year olds
takes place with
Friends or Colleagues

92%
of 'Podcasting' hours
are listened to by
15-24s alone.



Time of Day Listening takes place – MONDAY to FRIDAY average

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Sample comprised 1161 re-contacted respondents from the main RAJAR Survey.

Fieldwork was conducted during November 2014.

For Publication Enquiries contact;

Lyndsay Ferrigan
RAJAR Communications Manager
Email: Lyndsay@rajar.co.uk
Telephone Number: 02073950636

For more information:

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