

In today's connected world, 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 audio 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 audio-on-demand is contributing to listening behaviour. It also reveals the activities they are doing whilst listening, where they are listening, and who they are listening with.

MIDAS is released every season, this offering is Summer 2019. The sample comprised of 2219 former RAJAR respondents willing to be re-contacted. MIDAS is collected via an Online diary and Questionnaire. Summer 2019 fieldwork took place during May/June. Demographic split's of the following information is available on request.

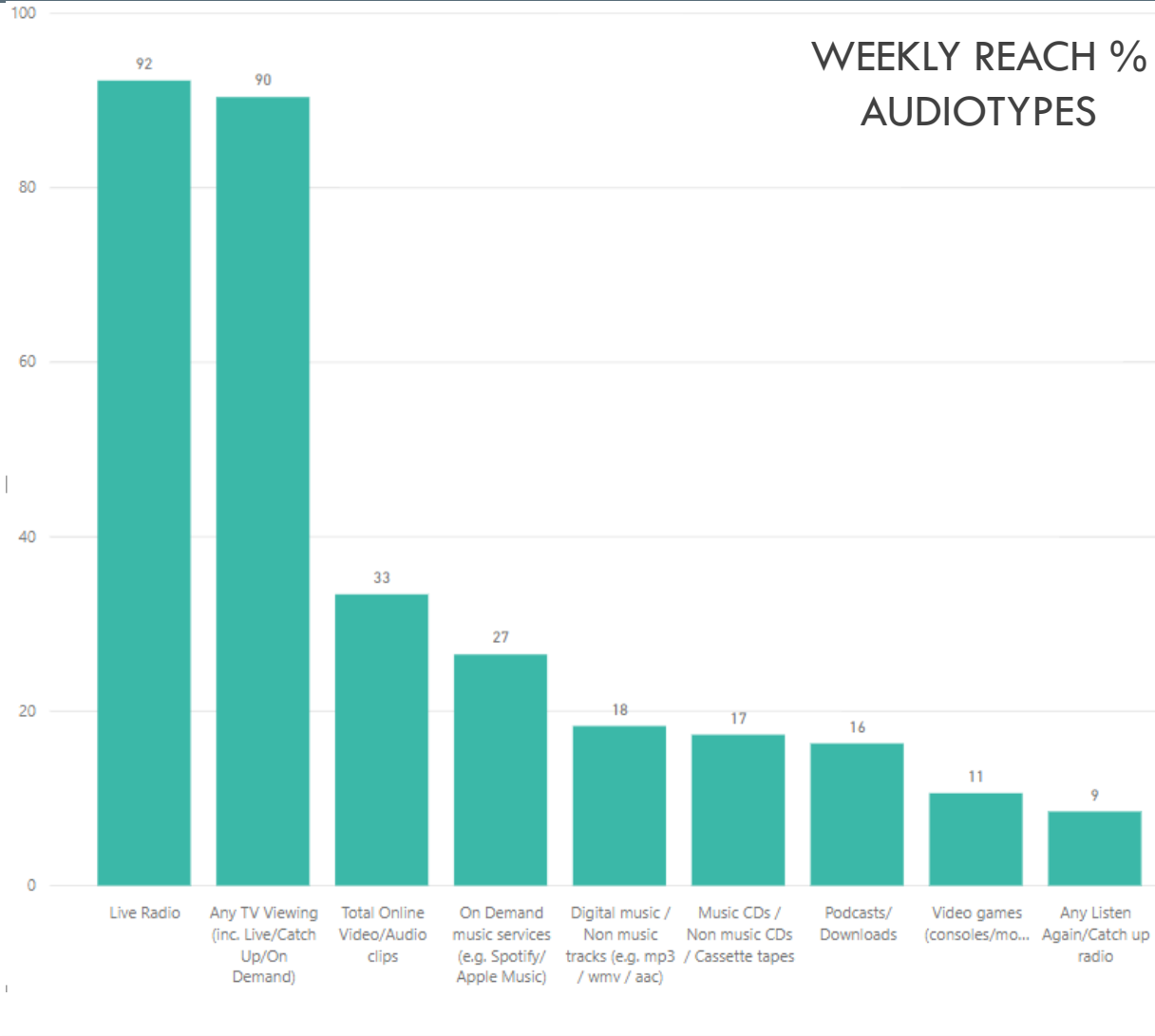
The following charts are displayed as follows;

- Audio Overview
- Wave on Wave Trends
- Live Radio
- Listen Again
- Podcasting
- On Demand Music Services
- Devices
- Time Spent

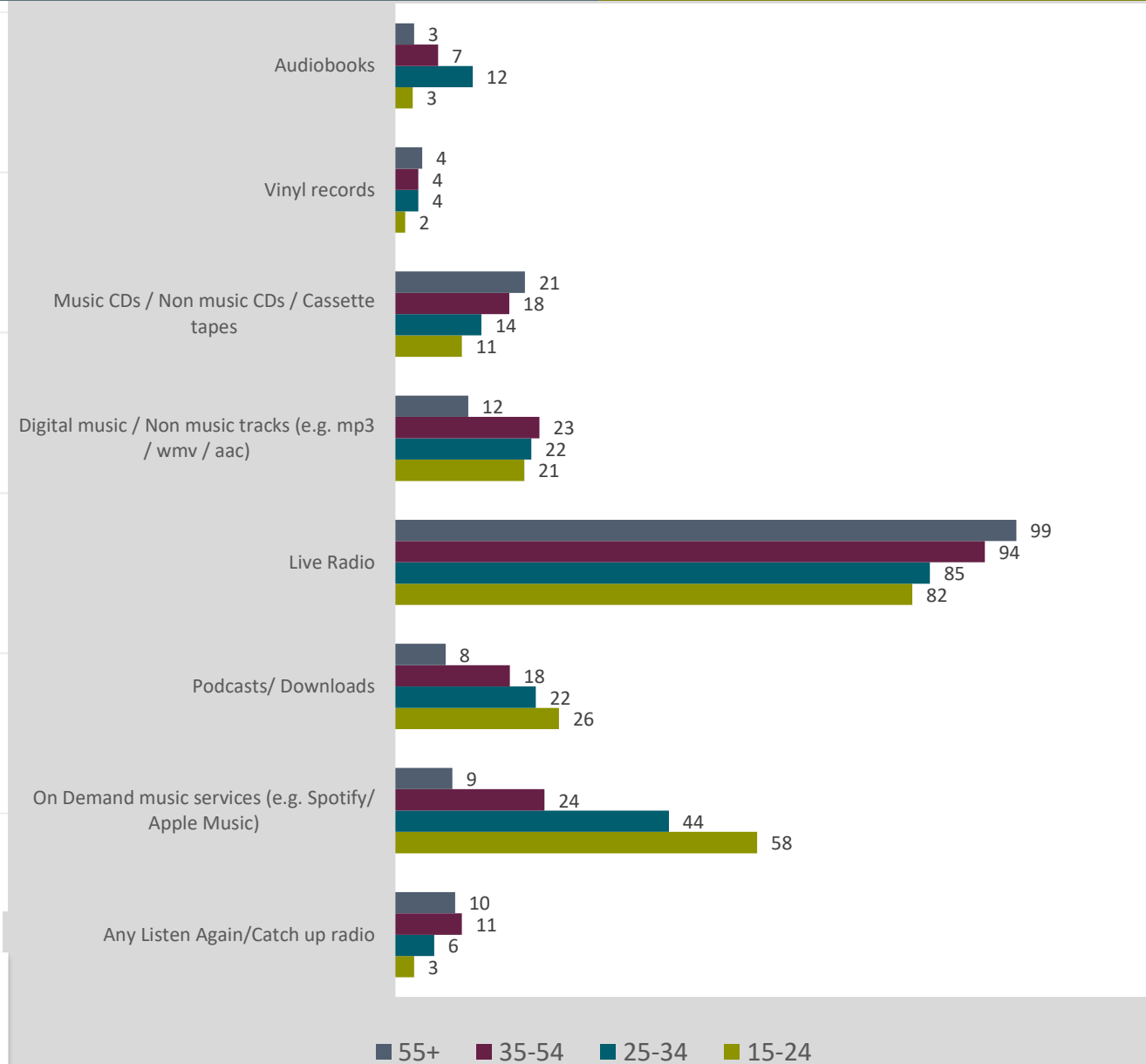
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Telephone Number: 02073950636

WEEKLY REACH %
AUDIOTYPES

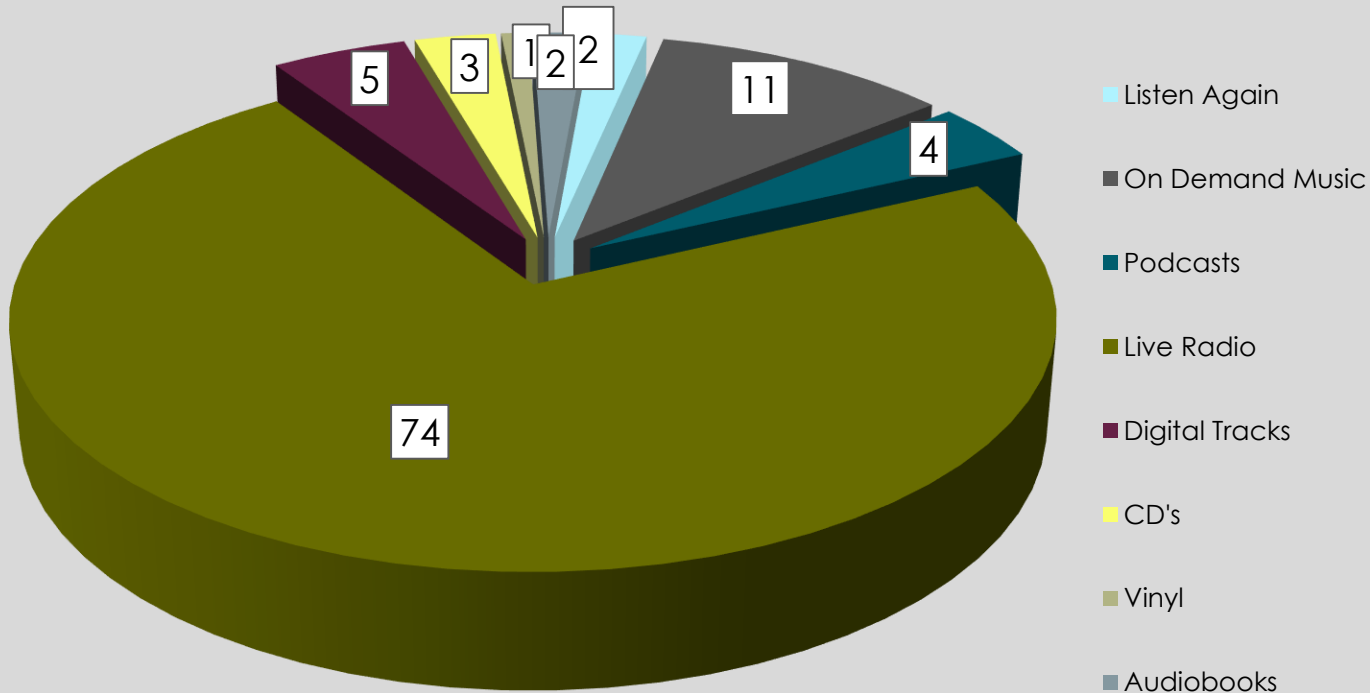


ALL ADULTS 15+



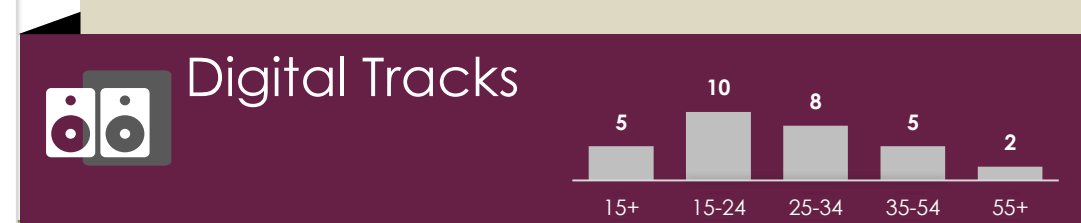
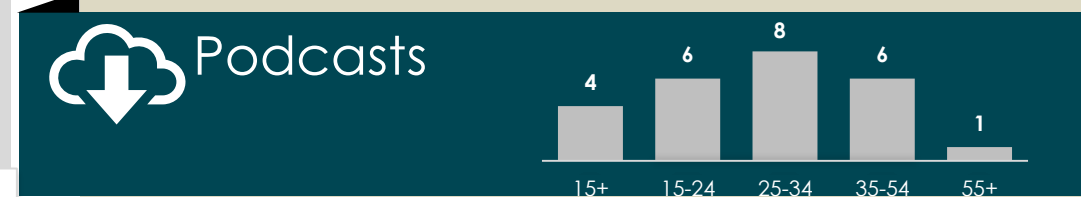
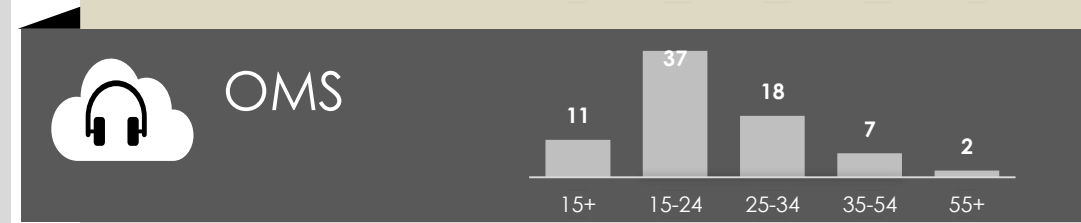
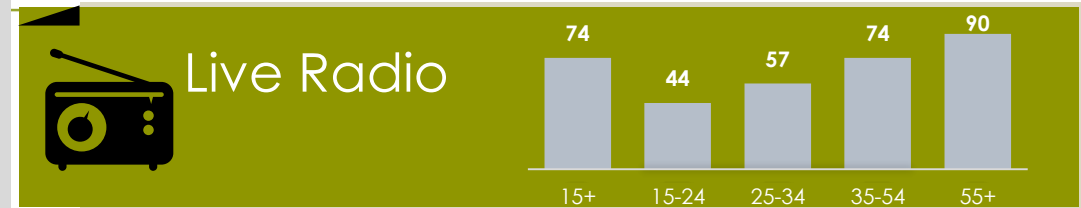
55+ 35-54 25-34 15-24

AUDIO OVERVIEW

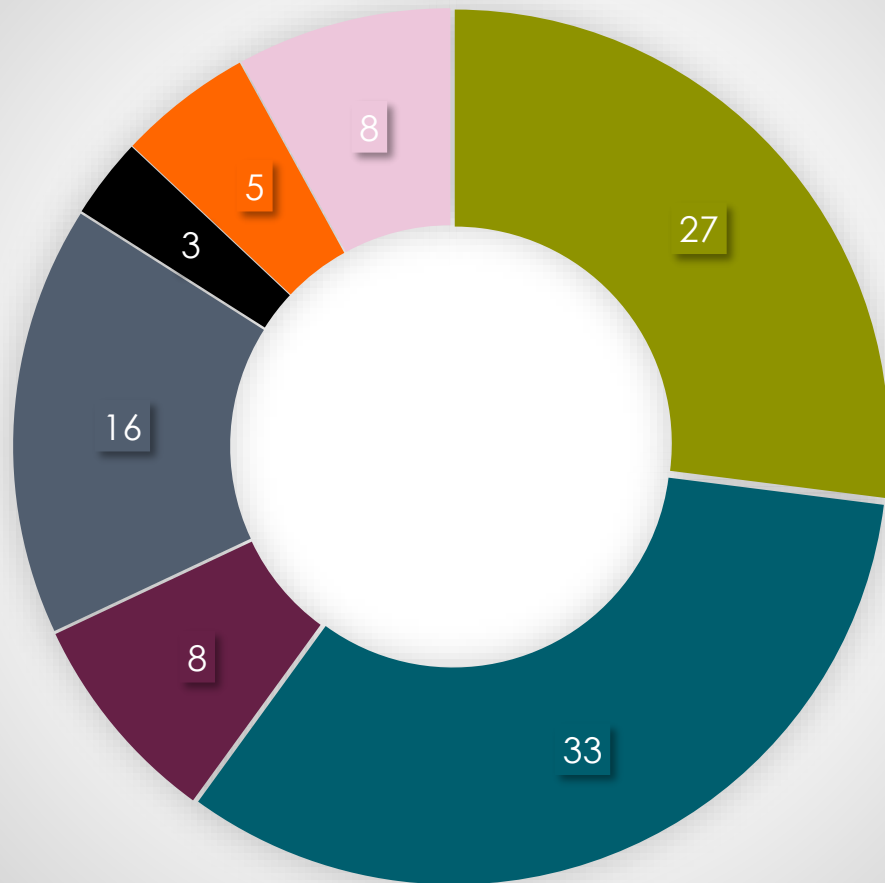


Audio (excluding visual) by Share % for All Adults 15+

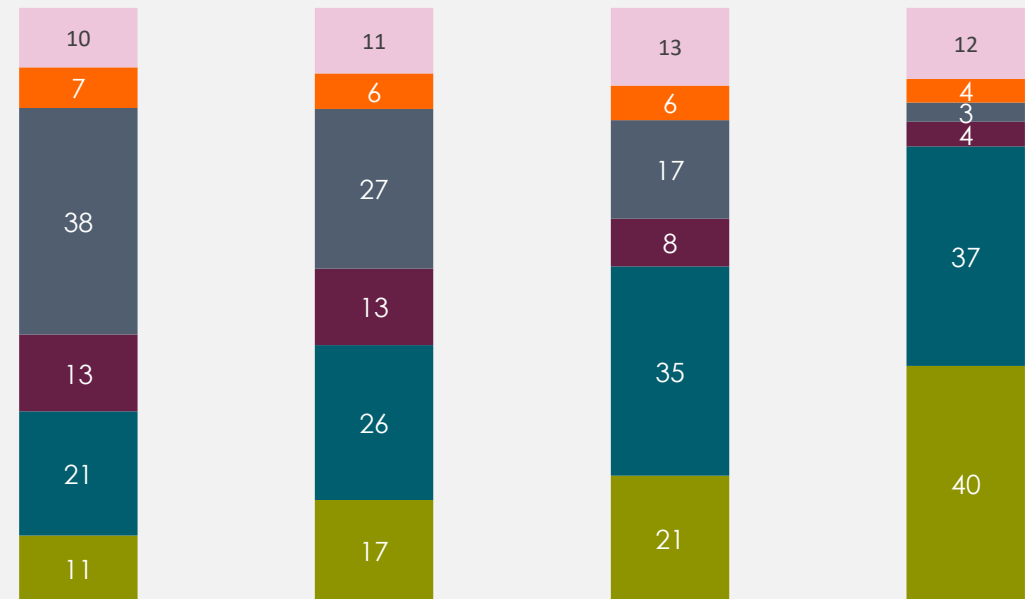
Audio (excluding visual) by Share % for Demographics (15-24, 25-34, 35-54 and 55+)



AUDIO OVERVIEW



'Other' devices includes Tablets, CD Players, Portable music players, etc.

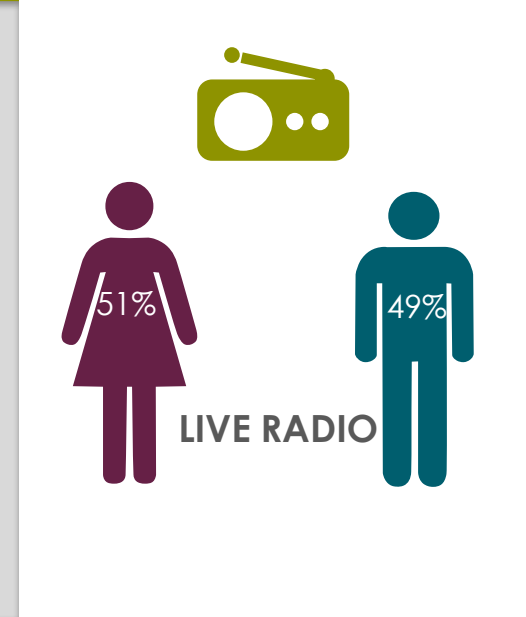
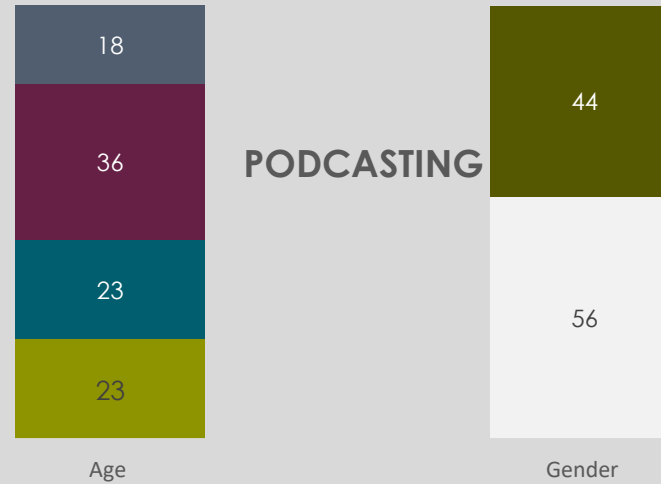
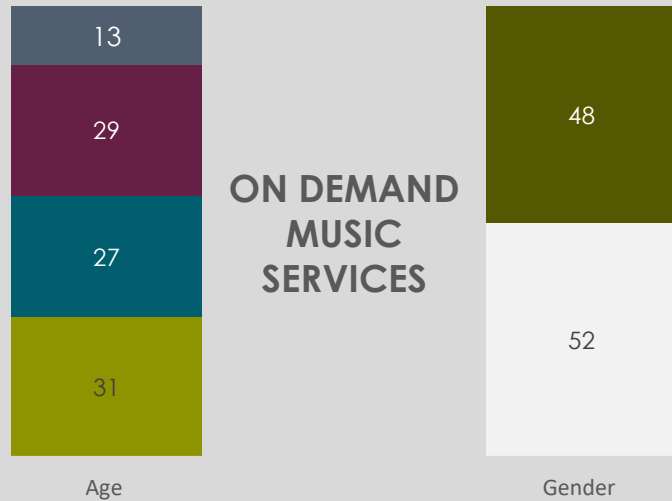


■ AM/FM Radio ■ DAB Digital Radio
■ Desktop/Laptop computer ■ Smartphone
■ Voice Activated Speaker ■ Other Device

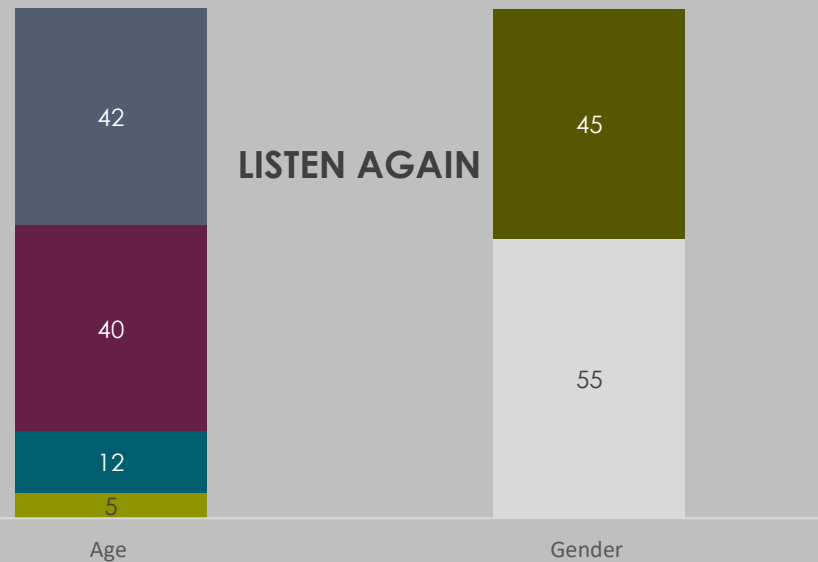
Audio (excluding visual) by Device Share % for Demographics (15-24, 25-34, 35-54 and 55+)

Audio (excluding visual) by Device Share % for All Adults 15+

AUDIO OVERVIEW



■ 15-24 ■ 25-34 ■ 35-54 ■ 55+ ■ Male ■ Female



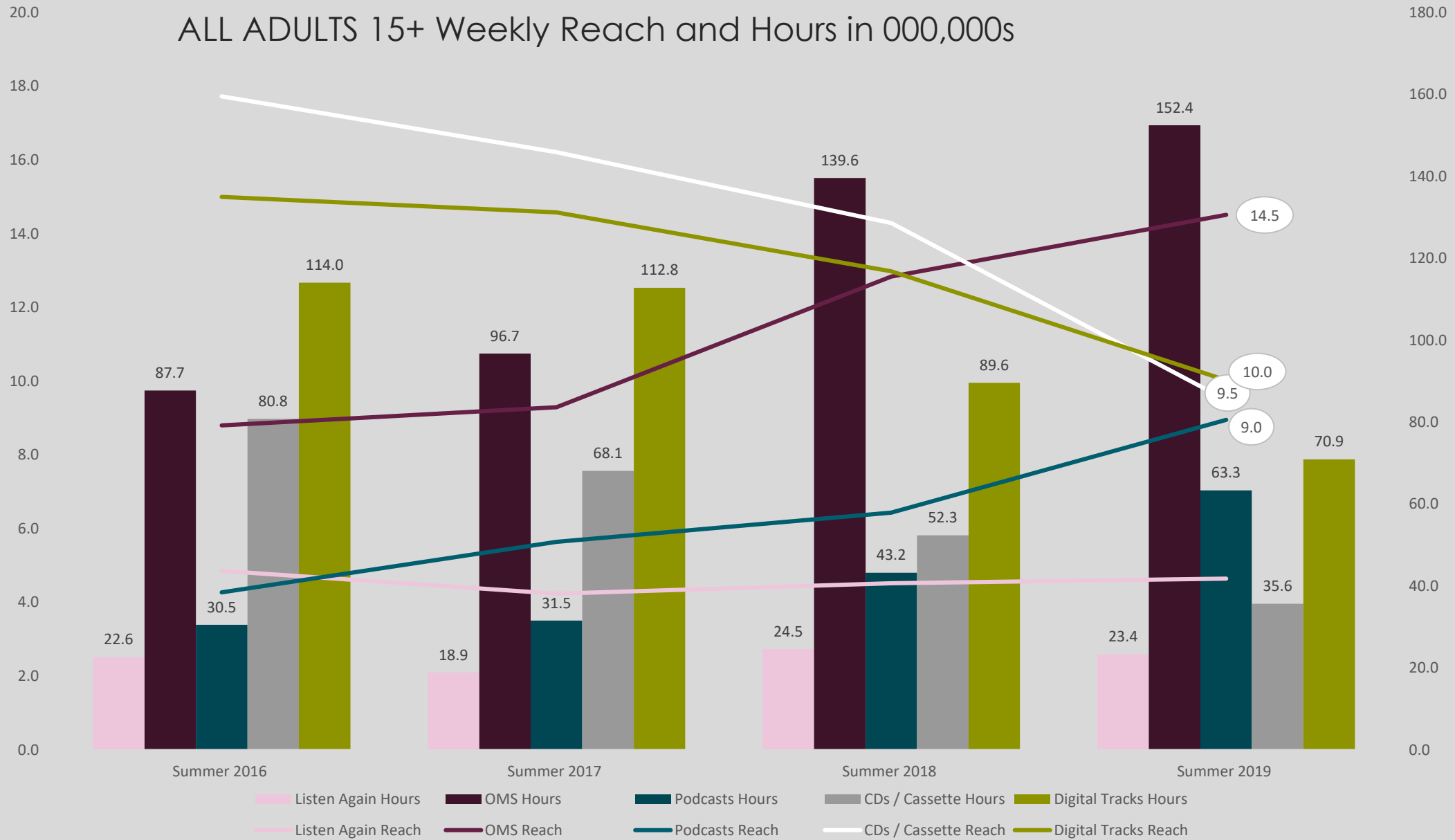
Almost half of all Podcast listeners are 15-35

Listen Again or Catch up radio is favoured in the older demographics.

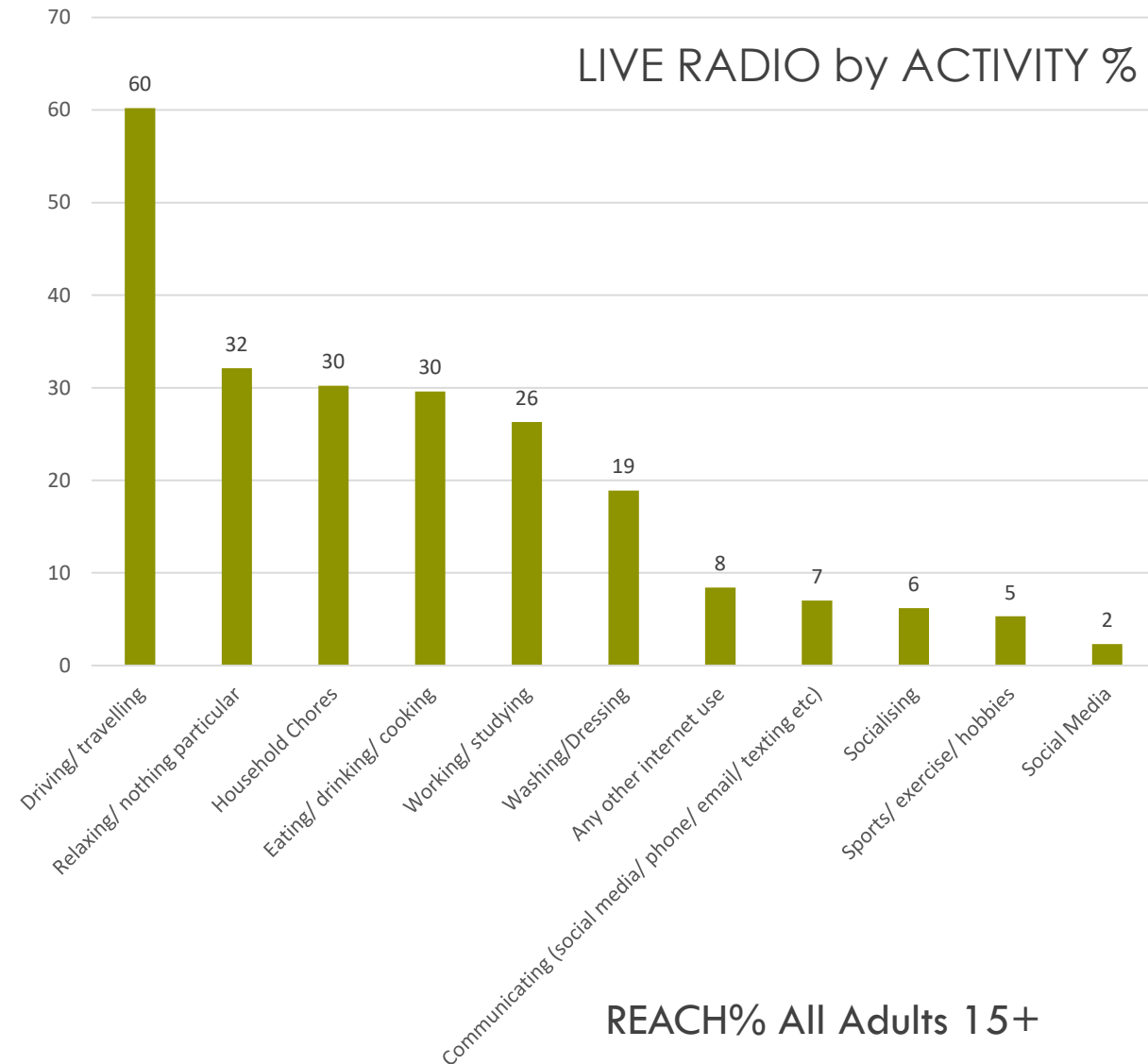
31% of On Demand Music (including Spotify, Apple Music, Amazon Prime Music) users are aged between 15-24.

Podcasting, Listen Again and OMS slightly tip toward Males but Females listen to more 'Live Radio'

ALL ADULTS 15+ Weekly Reach and Hours in 000,000s



LIVE RADIO by ACTIVITY %



22%
of live radio hours are listened to whilst Driving/Travelling

80%

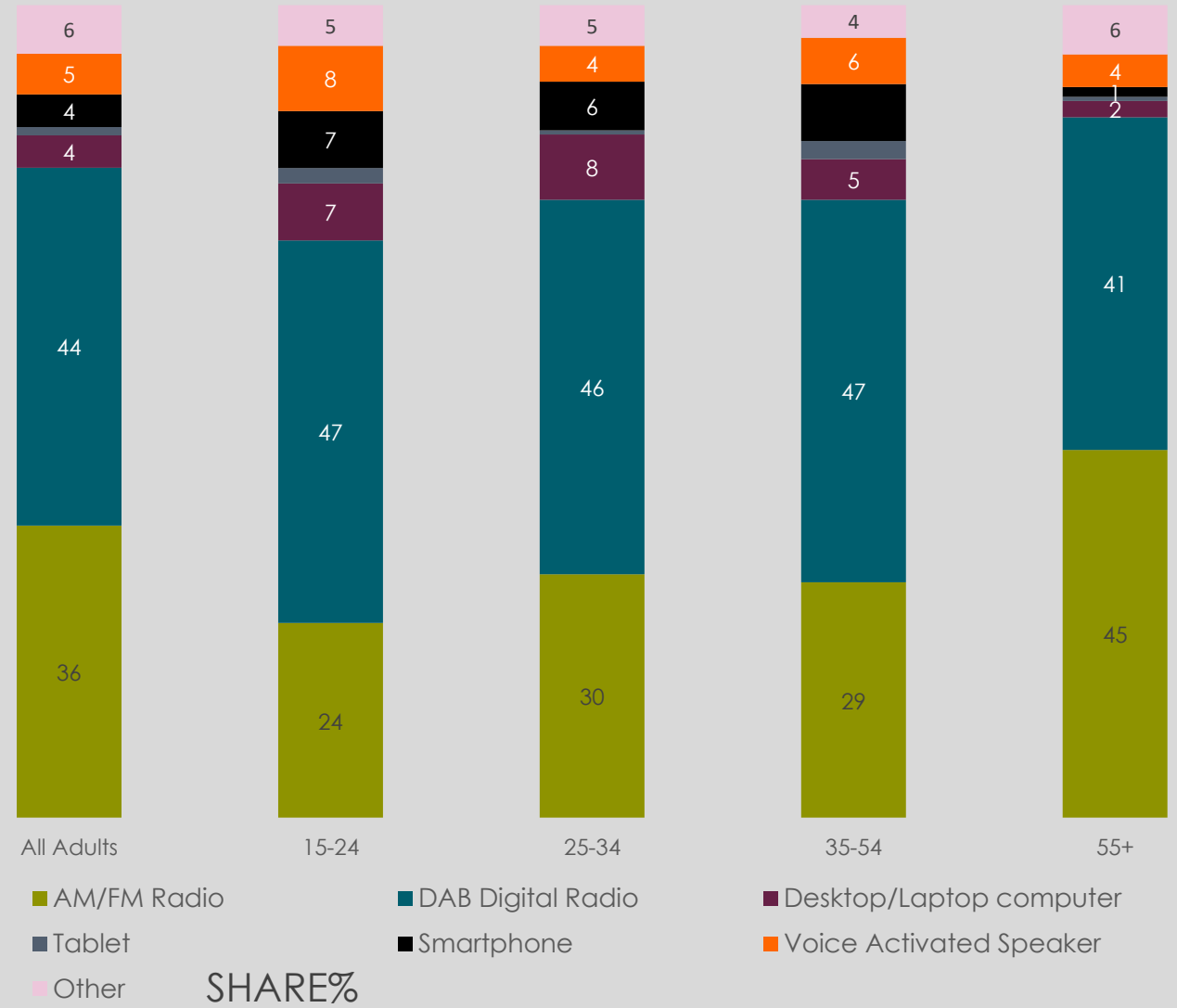
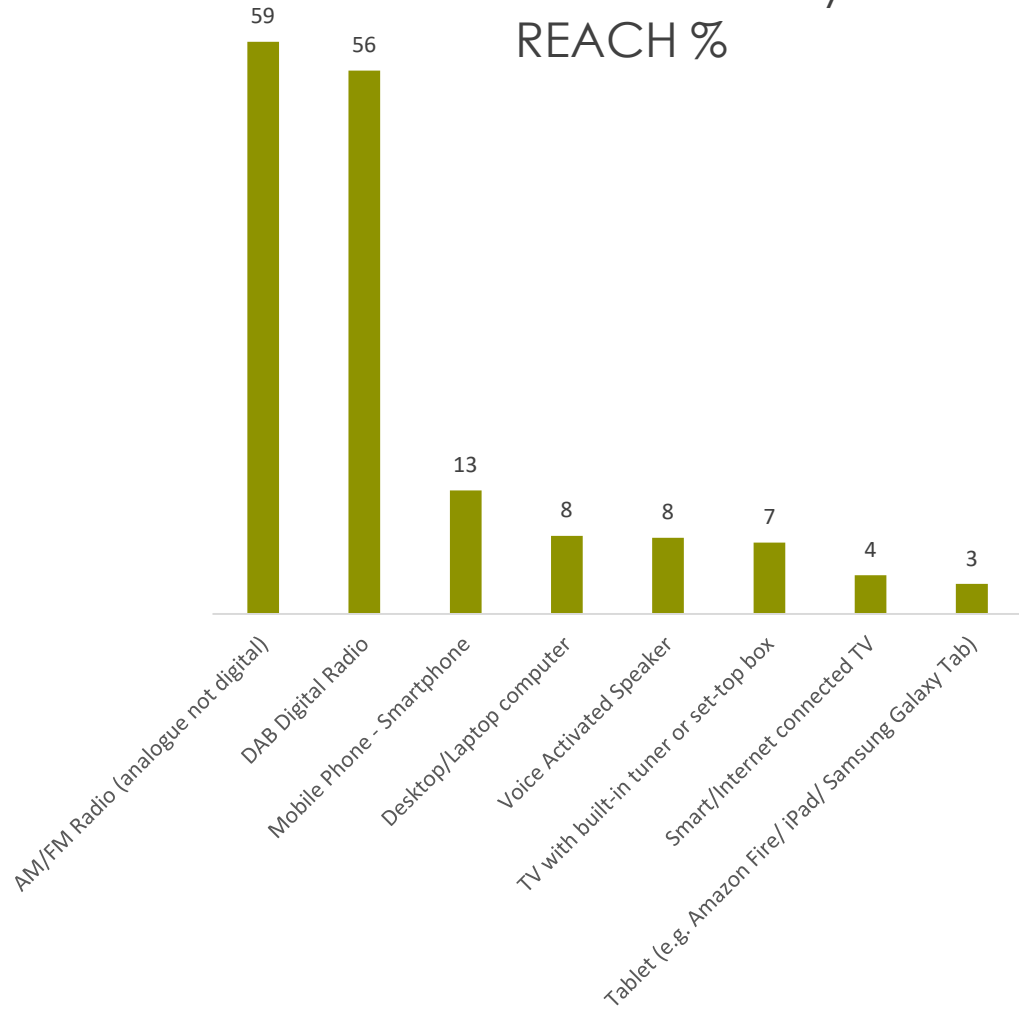
Of new music discoverers, still consider the Radio to be important for finding new stuff.

Average Hours per Listener weekly via Headphones to Live Radio



7 hours

LIVE RADIO by DEVICE REACH %



LIVE RADIO via LOCATION and WHO WITH



Home

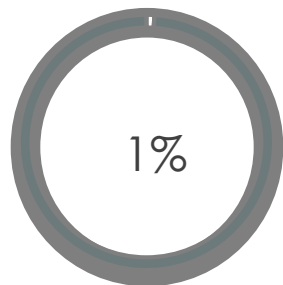
Car/Van/Lorry



22%

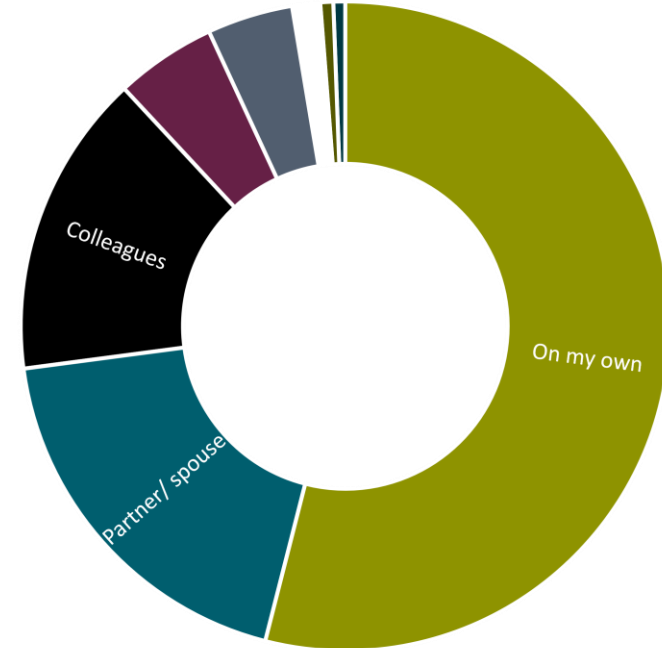


Work/Place of Study



Public Transport/Walking

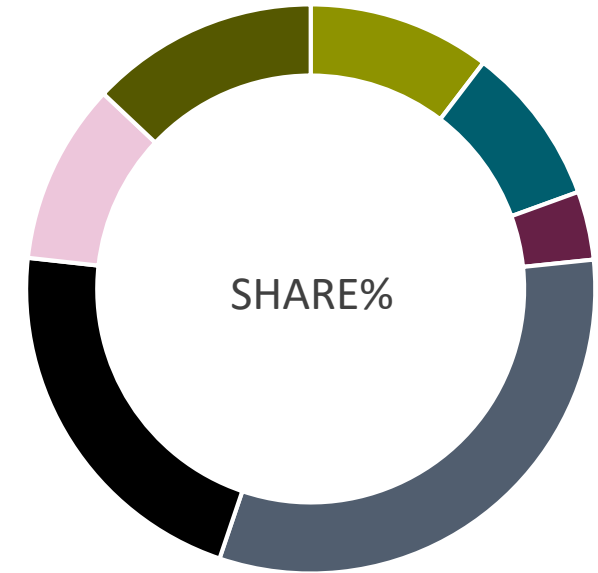
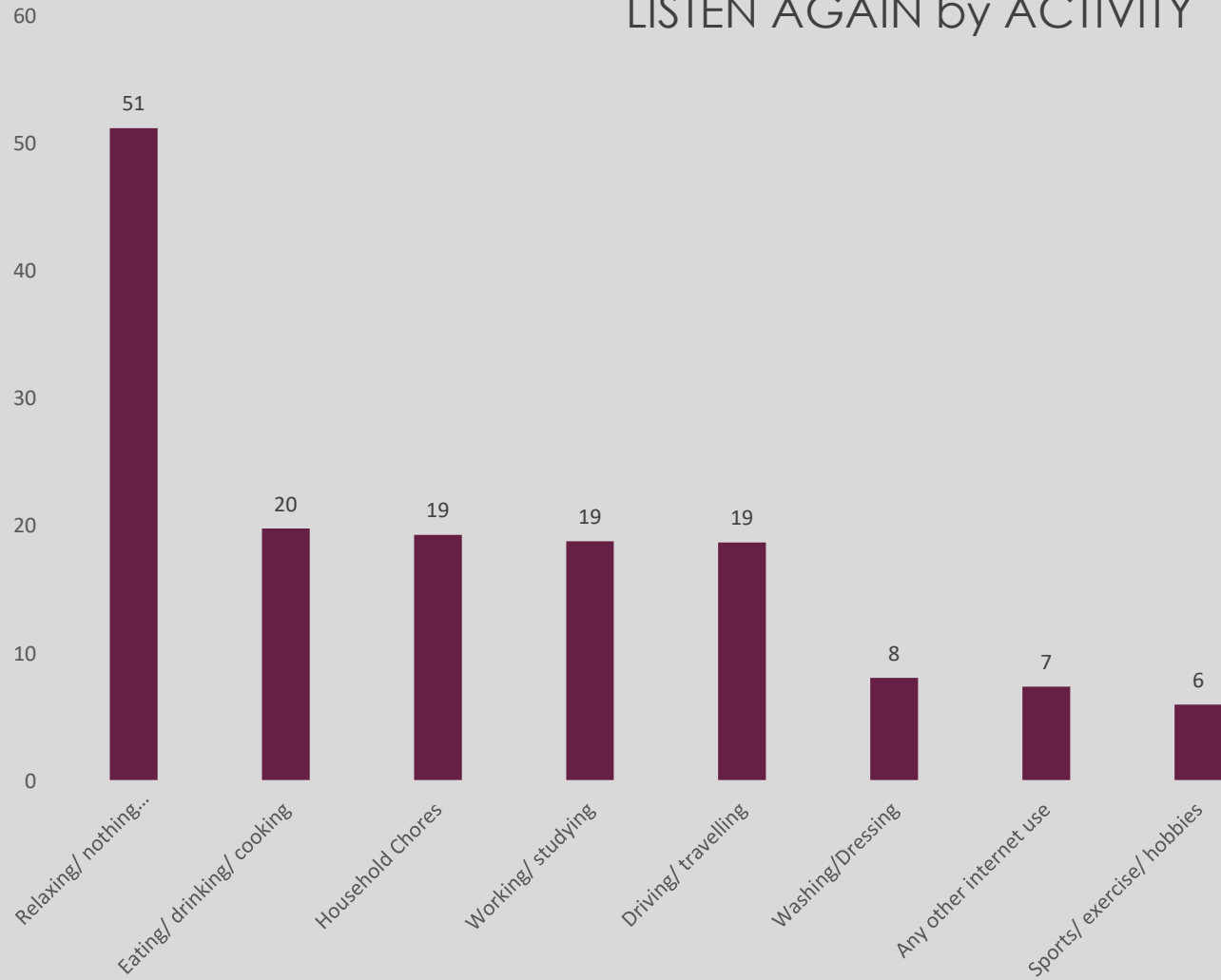
*2% elsewhere



Over half (54%) of live radio listening is done alone, this is consistent through the age demographics.

In 'home' dominates live radio listening hours with a share of 58%, in vehicle 22%, at work or place of study 19%

LISTEN AGAIN by ACTIVITY



- Household Chores
- Working/ studying
- Driving/ travelling
- Washing/Dressing
- Any other internet use
- Sports/ exercise/ hobbies
- Other

REACH % - ALL Adults 15 +

LISTEN AGAIN by DEVICE

Smartphones are the most frequently used device to go back and listen to a radio programme at a later date. Almost half (49%) of catch up radio listening hours were done this way, with Tablet 24% and PC/Laptop 23%.



49%



24%



23%

4.4 Million

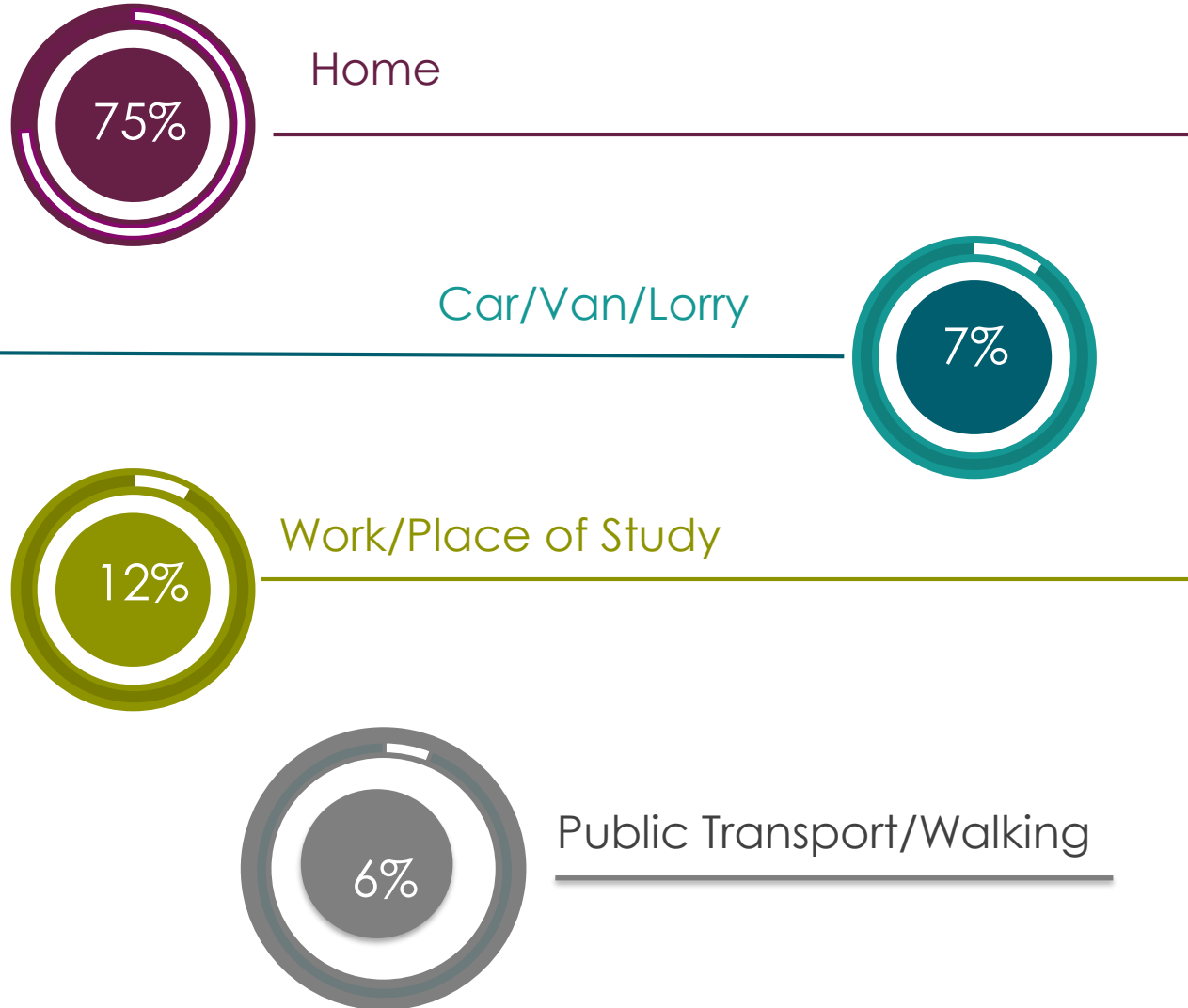
. 'Listen Again' users claim to listen to more Live Radio since they started using Catch Up services

5.9 million hours of Catch Up Radio is listened to through Headphones each week.

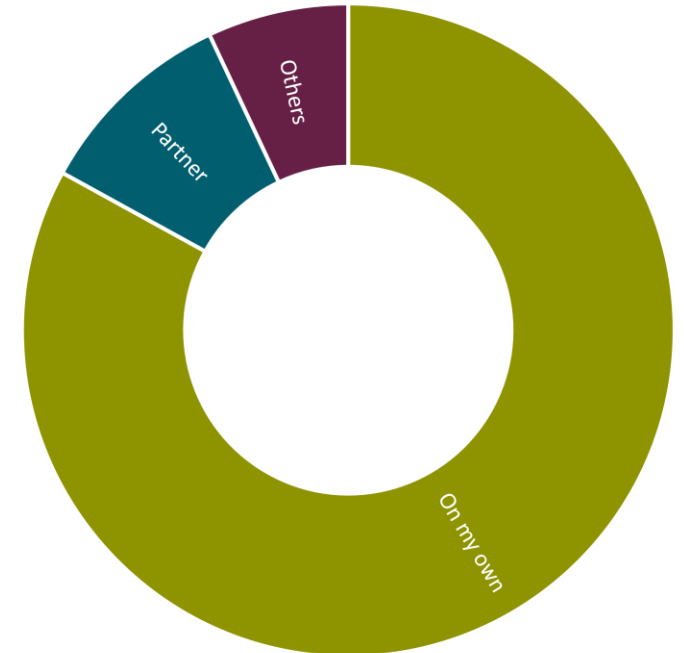


5.9 million

LISTEN AGAIN via LOCATION (Share) and WHO WITH



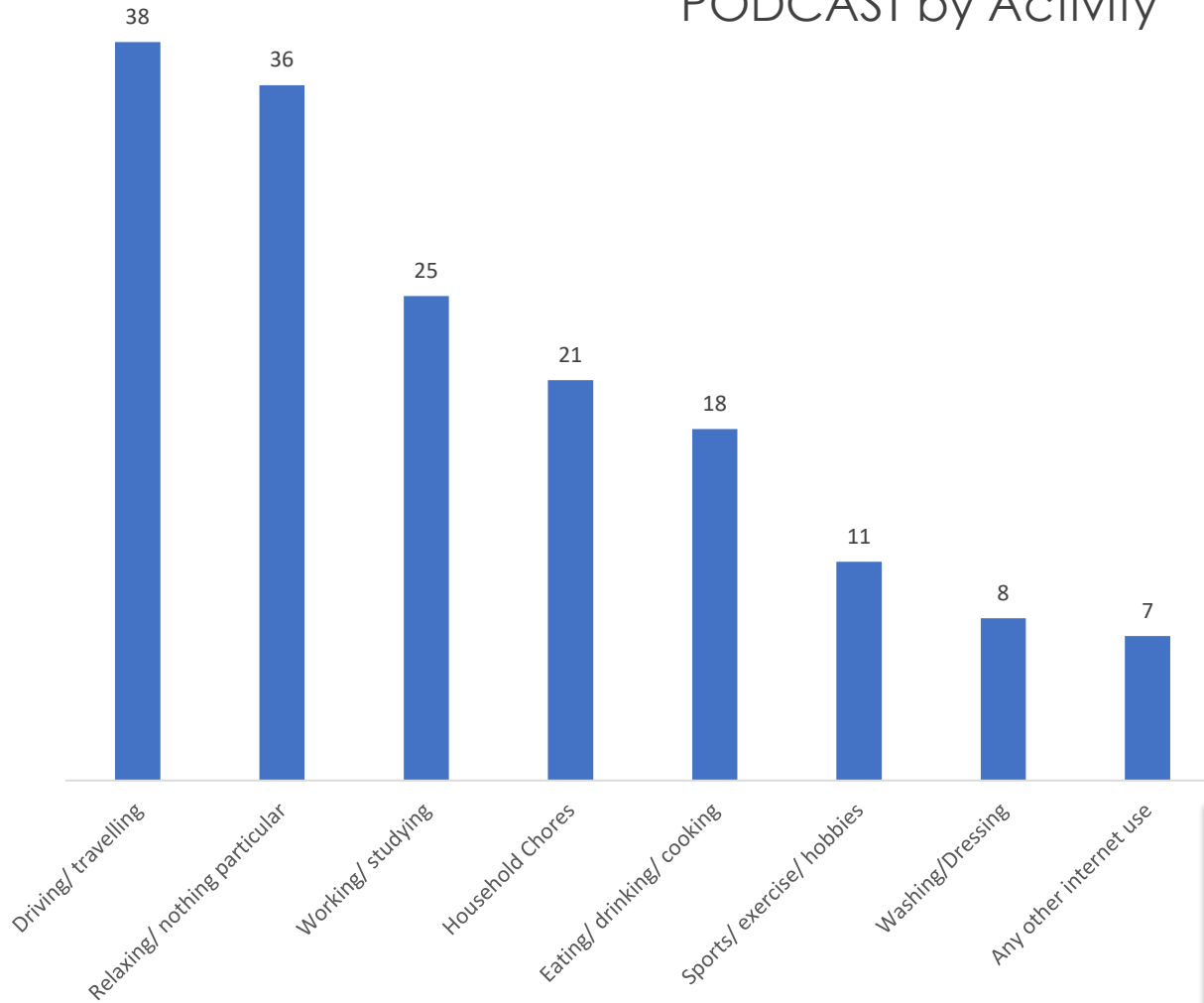
*2% Elsewhere



84% of Catch Up or Listen Again radio hours are spent listening on a person's own, only 11% with a partner or spouse and less frequently with others.

three quarters of Catch Up radio listening is done at Home.

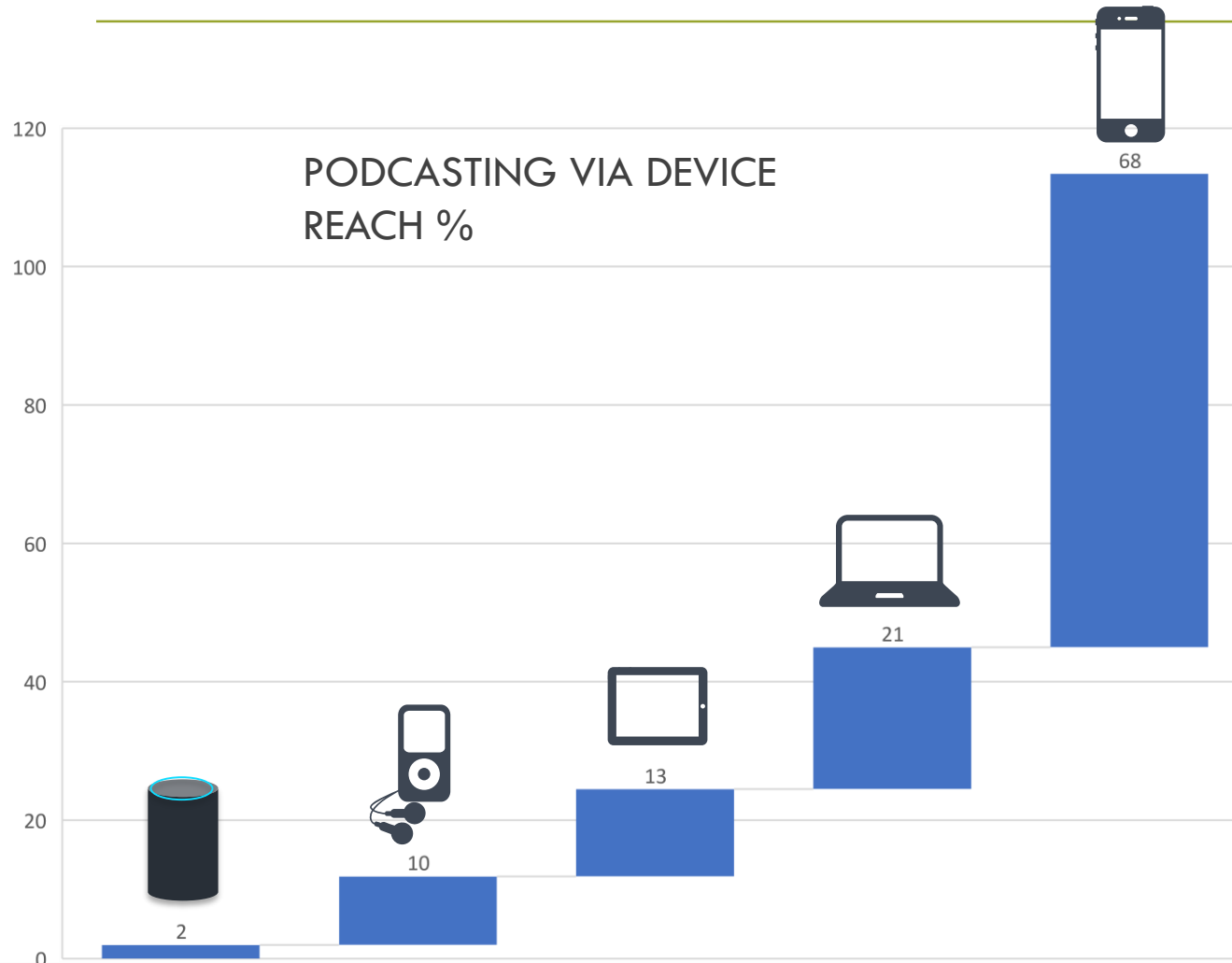
PODCAST by Activity



28%
of Podcasting
hours listening to
whilst
working/studying

71% of Podcast listeners listen to the whole episode and 65% listen to mostly all of the episodes they download.

PODCASTING VIA DEVICE REACH %



Smartphones are the preferred device for listening to Podcasts with a share of 65% of the listening hours.

34 million hours of Podcasts listened to through Headphones each week.



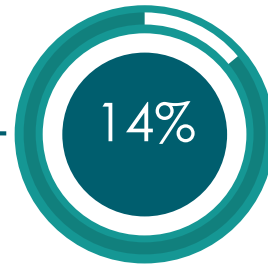
34 million

PODCASTING via LOCATION and WHO WITH

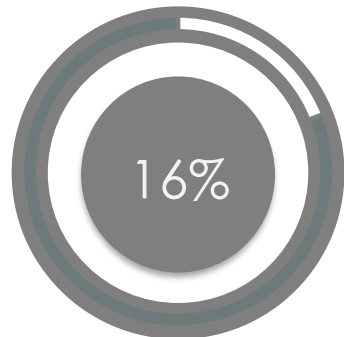


Home

Car/Van/Lorry

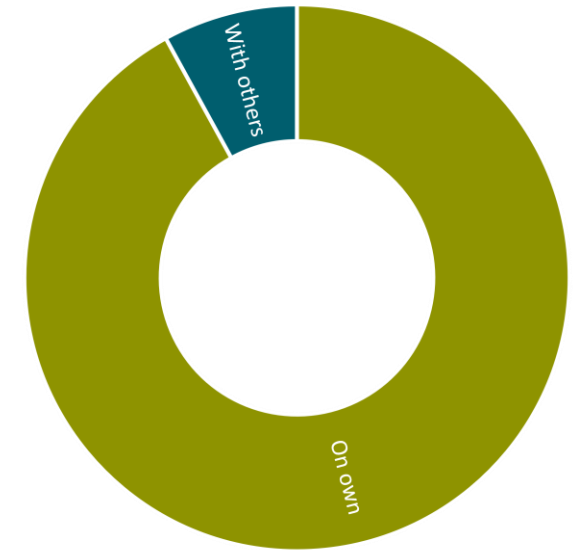


Work/Place of Study



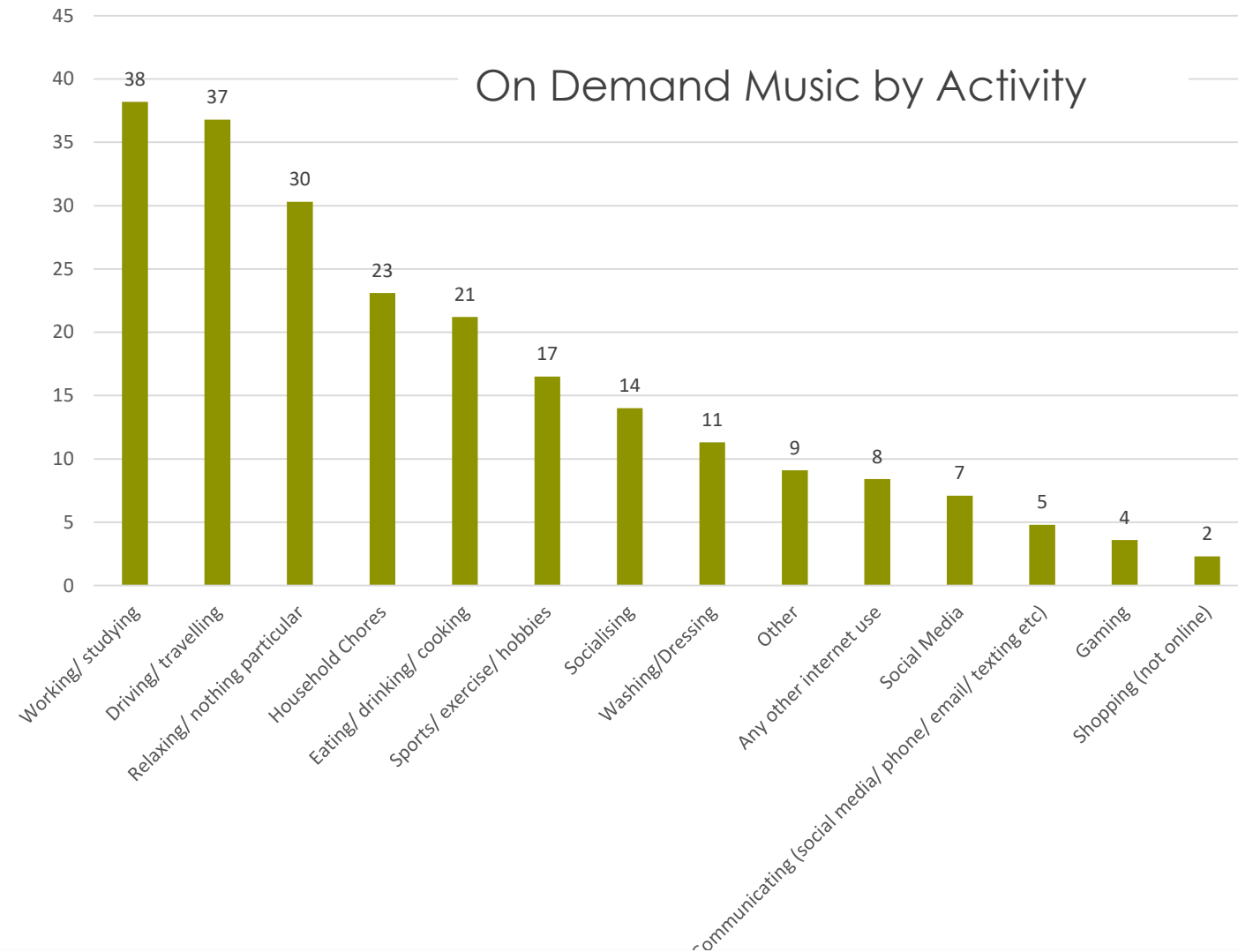
Public Transport/Walking

4% Elsewhere



Podcasting is almost always a solo activity, with a share of 92%

On Demand Music by Activity

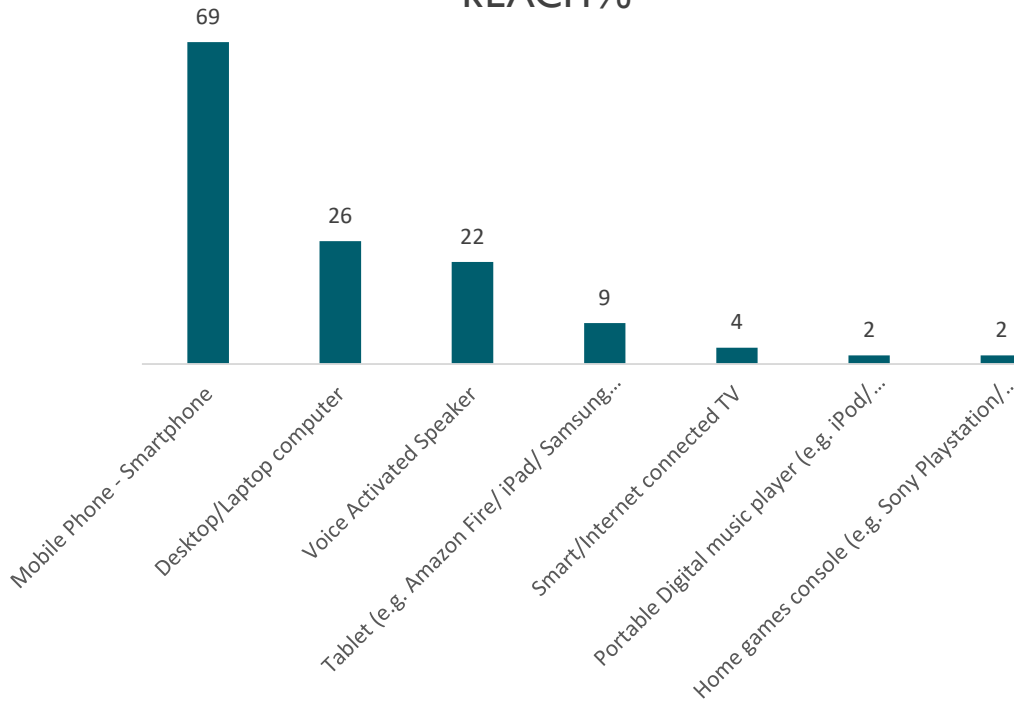


35%
of On Demand
Music hours
listening to whilst
working/studying

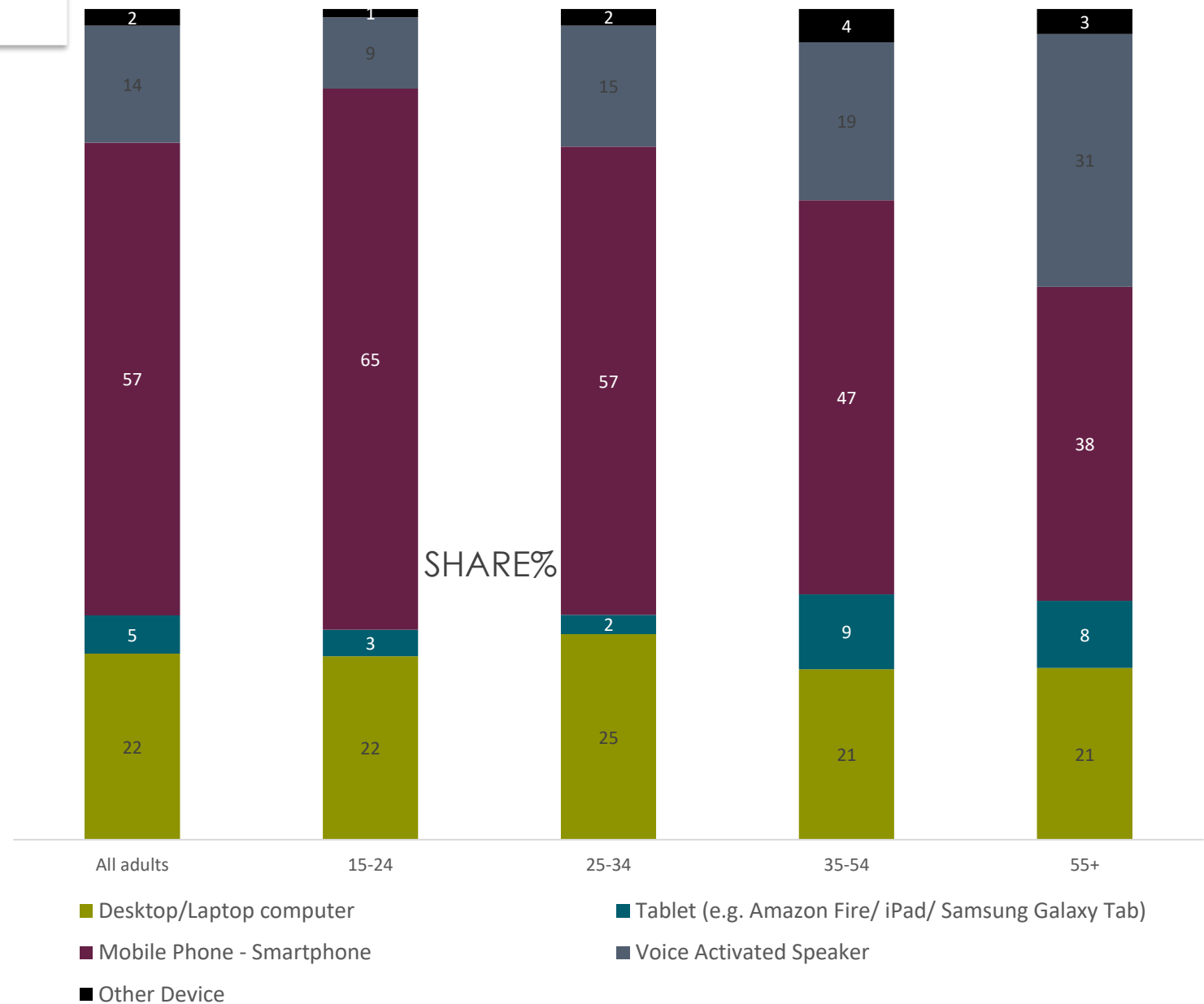
15m
use a Premium
On Demand
Music Service

On Demand Music by DEVICE

REACH%



SHARE%

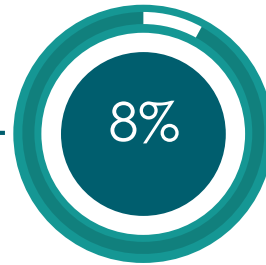


On Demand Music by LOCATION (Share) and WHO WITH

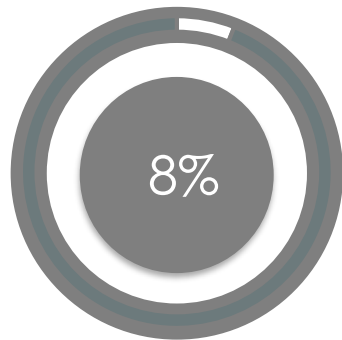


Home

Car/Van/Lorry

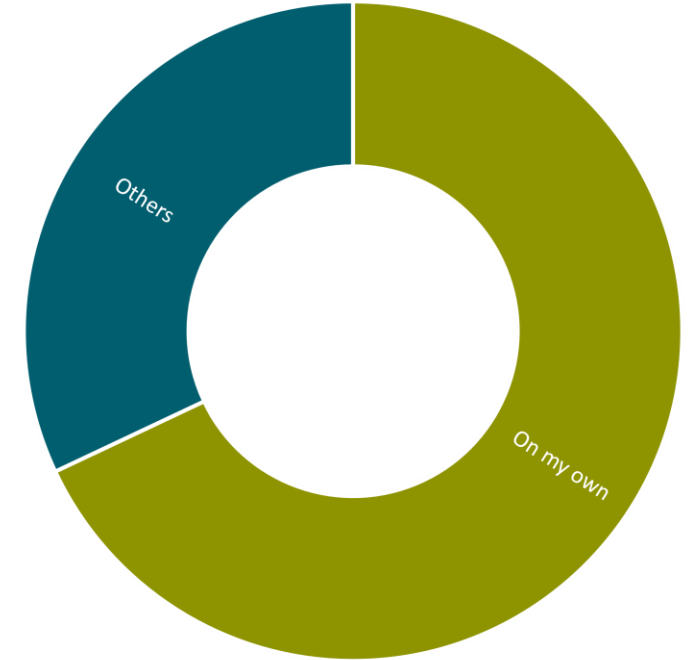


Work/Place of Study



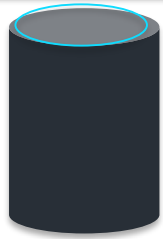
Public Transport/Walking

8% Elsewhere



Listening to music services on demand is more sociable than other audio types such as Podcasting or Catch up Radio with a third of listening hours spent with other people.

VOICE
ACTIVATED
SPEAKERS



SHARE%

■ Audiobooks ■ Podcasts ■ Live Radio ■ On Demand Music



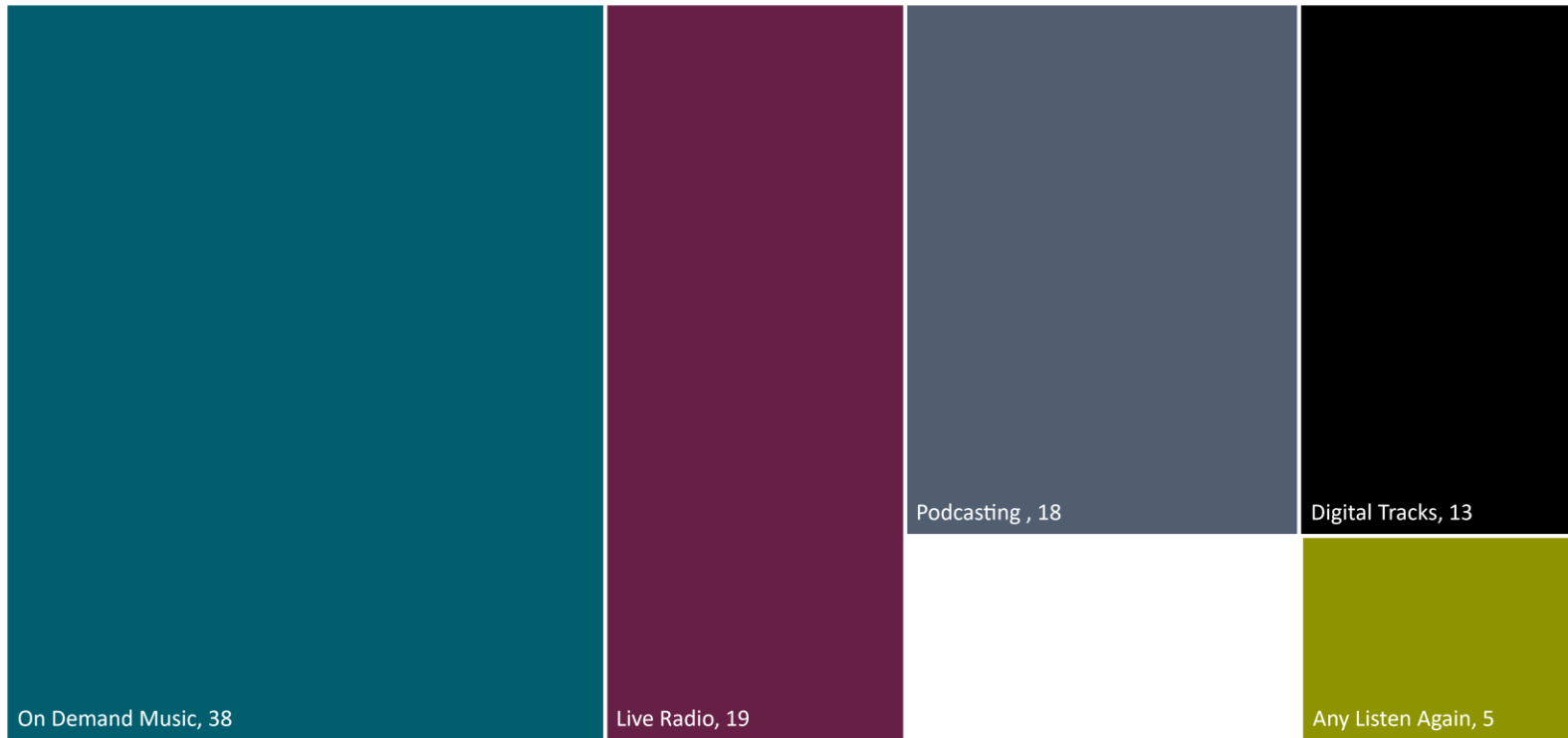
70% of all listening done on a Voice Activated Speaker such as an Amazon Echo, Google Home or Sonos 1 is to Live Radio. On Demand Music has a share of 28%, Podcasting 1% and Audiobooks 1%.

SMARTPHONE



SHARE%

■ Any Listen Again
 ■ On Demand Music
 ■ Live Radio
 ■ Podcasting
 ■ Digital Tracks
 ■ Other



For All Adults the time spent listening to audio types via a Smartphone is quite evenly distributed. On Demand Music has the highest share with 38% of the listening, followed by Live Radio 19%, Podcasts 18%, Digital Tracks (owned music) 13%, Catch Up Radio 4%

LAPTOP/DESKTOP



SHARE%

Any Listen Again ■ On Demand Music ■ Podcasts ■ Live Radio ■ Digital Tracks ■ Other



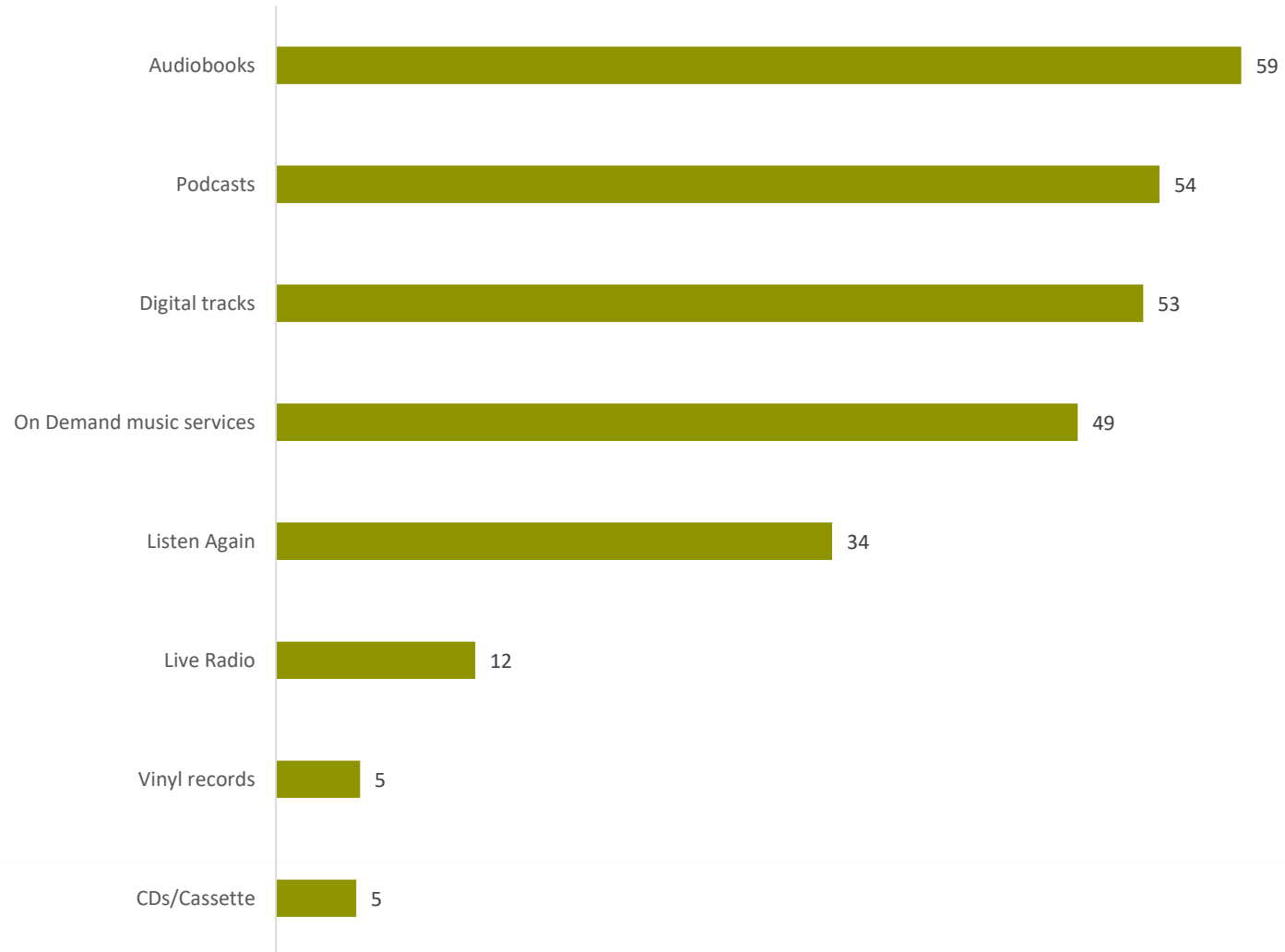
The listening hours done via a Laptop or Desktop varies from Wave to Wave and between age groups.

Live Radio accounts for 39%, On Demand Music 31%, Digital Tracks 12%, Podcasts 10%, Listen Again 5%. This is based on All Adults 15+.

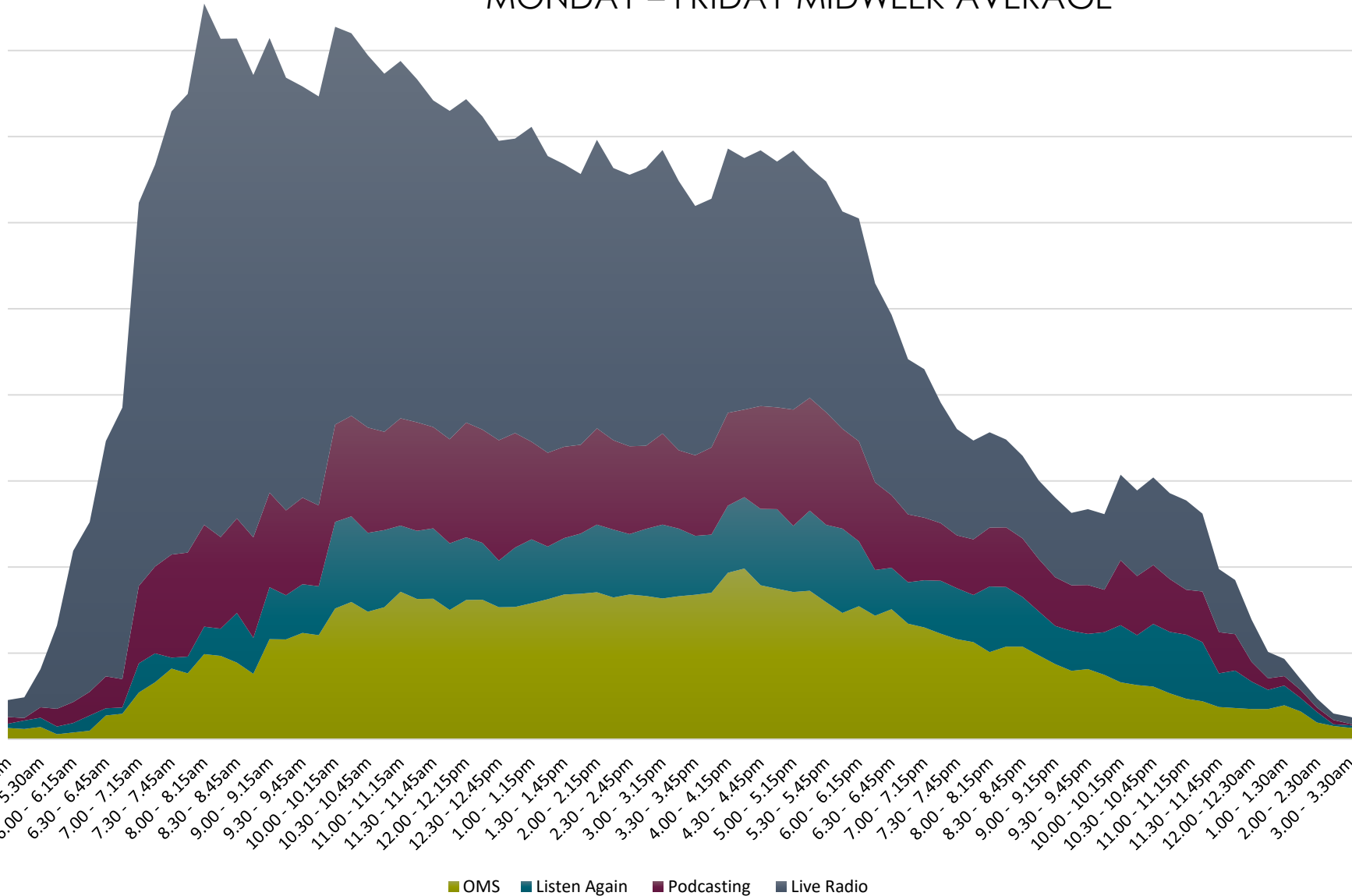
HEADPHONES



REACH%



MONDAY – FRIDAY MIDWEEK AVERAGE



Live Radio listening peaks at 8.00am-8.15am

Podcasting 5.00-5.15pm

Listen Again 4.15-4.30pm

On Demand Music 4.15 - 4.30pm