



Radio Joint
Audience
Research
Limited

MIDAS

**Measurement of Internet Delivered
Audio Services**

October 2008

MIDAS:

Measurement of Internet Delivered Audio Services

October 2008

1. Introduction

This is RAJAR's third report on the measurement of internet delivered audio services (MIDAS). With broadband internet access rising from 51% of UK households in 2007 to 56% in 2008 (source: Office of National Statistics) and the high profile launch of the BBC iPlayer, listening to the radio online has never been easier or more popular.

Although not necessarily limited to the realm of traditional radio industry players, podcasts and Personalised Online Radio compete in the same audio entertainment space - albeit with different regulatory limitations.

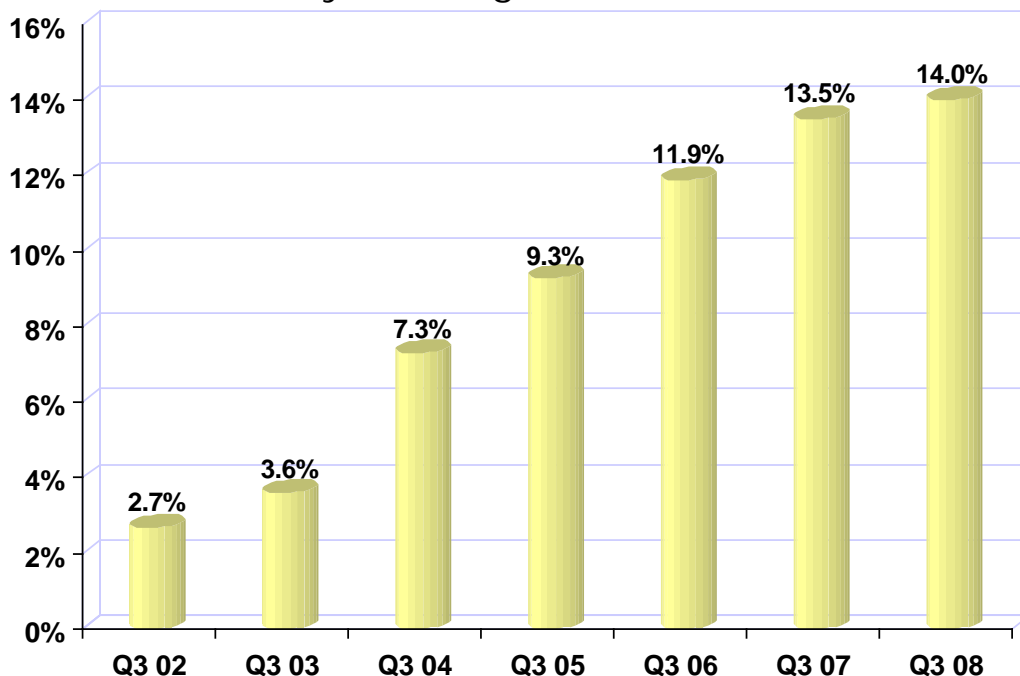
MIDAS covers all four topics:

- Listen Live via the internet
- Listen Again via the internet
- Personalised Online Radio
- podcasts

RAJAR is the official body measuring radio audiences in the United Kingdom. The main RAJAR survey estimates live radio audiences for each quarter hour in an average week. This data forms the base for the currency used by advertisers to plan and buy airtime on commercial radio, as well as aiding programming across the whole radio industry.

Alongside radio listening sessions collected by quarter hour, respondents are also asked other general media consumption questions such as "do you ever listen to the radio via the internet" or "do you listen to podcasts". Using respondents who answered yes to either of these two questions, RAJAR conducted an online re-contact survey to gain more insight into participation in each of these four activities (Online Live Listening, Online Listen Again, Personalised Online Radio and Podcasts) and to gauge any subsequent impact on "traditional" radio.

Weekly listening via the internet *



Base: All adults 15+

Source: RAJAR/Ipsos MORI/RSMB

(* Respondents who claimed to listen to the radio via the internet at least once a week. Includes Listen Again + listening to foreign stations and other non-RAJAR services)

This third instalment was conducted in October 2008 by Ipsos MORI using a sample made of (a) RAJAR respondents from the previous 6 months who had claimed to listen to the radio via the internet, or downloaded podcasts and (b) respondents to the first and second instalments of this survey (conducted in October 2007 and May 2008 respectively).

The RAJAR Main Survey acts as an establishment survey to MIDAS, allowing us to determine the growing size of the MIDAS population. At the time MIDAS 3 was in the field, its population was estimated to represent 16,854,000 Adults 15+ or 33.2% of the UK Adult 15+ Population (up from 15,223,000 for MIDAS 2 conducted in May 2008).

Along with 863 respondents to the first two MIDAS surveys, a further 2,855 RAJAR respondents within the target audience (i.e. respondents who had claimed to listen to

the radio via the internet and / or download podcasts) were invited to participate in the online survey.

At the cut-off point, and after QC procedures had been implemented, the final usable sample was 1,142 respondents (593 from the previous surveys and 549 new respondents). This report is based on their responses.

The use of an online methodology is particularly appropriate in the case of this survey as we asked an online group about their online activity. The non-MIDAS group (i.e. the remaining 33,881,000 Adults 15+) is treated as non-podcast users and non-internet radio listeners in any result on all adults mentioned in this report.

2. Summary

- 16.1 million people (up from 14.5m in MIDAS 2) have claimed to listen to radio via the internet, including 15 million listening live and 13.5 million listening at a later time (using Listen Again services). In addition, 7.2 million have downloaded a podcast (up from 6m) and 2.9 million have used a Personalised Online Radio (up from 2.1m).
- 11.6 million people claim to listen to radio via the internet at least once a week, either live or through a Listen Again service (up from 9.4m), and 4.1 million to listen to a podcast (up from 3.7m).
- The average user of Listen Again services listens to 1.65 programmes each week. Three quarters of Listen Again listeners say the service has no impact on the amount of live radio that they listen to. Almost half of Listen Again listeners said they are now listening to radio programmes that they didn't previously listen to as a result of Listen Again services.
- Almost 7 million have heard of WiFi radio (a standalone radio set that connects wirelessly to the internet and is able to play any internet radio service) but only half a million claimed to own one.
- The typical podcast user subscribes to 4.41 podcasts (up from 3.59) and spends just over an hour in the last week listening to them. Comedy and music are still the two favourite genres.
- iTunes is the software of choice, used by almost 70% of podcast users to subscribe to podcasts, while 17% simply download directly from the website via their browser. 75% listen to podcasts on their home computer, and 66% listen using a portable audio/mp3 player.
- Podcast listening occurs throughout the day, with an evening peak when 39% of podcast users press the play button (weekdays). 78% listen to podcasts that are more than a week old.
- 35% of podcast users say they are now listening to radio programmes that they never used to listen to before thanks to podcasts.
- The level of people who have ever paid for a podcast remains stable at about 3% of podcast users. Thinking about how podcasts may be funded in the future, there is some appetite among the podcast community for podcasts containing adverts if they were free as a result with 55% saying they would be interested in downloading such content; however, only 33% responded positively to the idea of podcasts without adverts that had to be paid for.

3. Report

The total Adult 15+ UK population at the time of the survey was taken to be 50,735,000 and the target group forming the base of this survey (internet listeners and / or podcast users) represent 16,854,000 Adults 15+.

Note that the base and sample size will change from table to table according to the topic covered. The summary of each group with its corresponding sample and population (15+) is as follows:

Table 1: Summary of groups		
	Sample size	Weighted pop (000s)
MIDAS 3	1,142	16,854
Internet listeners	1,090	16,061
- Listen Live	998	14,977
- Listen Again	913	13,464
Personalised Online Radio	162	2,855
Podcast users	448	7,206

Where & When?

Almost a third (31.7%) of the UK's adult population (those aged 15 or over) have listened to radio via the internet. That equates to 16.1 million people.

The vast majority of internet radio listeners (89%) listen at home; 1 in 5 listen at work (21%) while 6% listen elsewhere.

Almost 15 million adults use live streams ("Listen Live") and 13.5 million have listened to programmes that are up to a week old using "Listen Again" facilities.

Table 2: Where/when do you listen to radio via the internet?		
Sample size = 1,090	('000s)	(%)
Base = all listening via internet	16,061	100%
Where?		
At home	14,270	88.8%
At work	3,406	21.2%
Elsewhere	969	6.0%
When?		
Using live streaming	14,977	93.3%
Using Listen Again	13,463	83.8%

From which source?

71% listen to the radio via the internet by going directly to one of the BBC radio station websites and 51% by visiting the iPlayer, which gathers both BBC TV and Radio programmes.

Table 3: Which source do you generally use to listen to the radio via the internet?		
Sample size = 1,090	('000s)	(%)
Base = all listening via internet	16,061	100%
From a media player gathering several radio streams:		
- BBC iPlayer	8,260	51.4%
- iTunes	2,439	15.2%
- other media player	3,673	22.9%
From a station website directly:		
- BBC radio stations	11,408	71.0%
- UK commercial radio stations	3,941	24.5%
- foreign/international radio stations	2,061	12.8%

How Often?

Three quarter of internet listeners, or 23% of the adult population, listen at least once a week, with 3.7 million people listening daily.

Table 4a: How often do you generally listen to the radio via the internet?		
Sample size = 1,090	('000s)	(%)
Base = all listening via internet	16,061	100%
Several times a day	1,291	8.0%
Everyday/most days	2,441	15.2%
2-3 days per week	3,993	24.9%
About once a week	3,920	24.4%
About once a month	2,792	17.4%
Less often	1,538	9.6%
Don't know	87	0.5%

Amongst each group, the Live Listeners tend to listen more often than the Listen Again users, with 64% of Live Listeners using such services at least once a week versus 56% for Listen Again.

Table 4b: How often do you generally LISTEN LIVE to the radio via the internet?		
Sample size = 998	'000s	(%)
Base = all LISTEN LIVE via internet	14,977	100%
Several times a day	1,074	7.2%
Everyday/most days	1,998	13.3%
2-3 days per week	2,863	19.1%
About once a week	3,669	24.5%
About once a month	2,730	18.2%
Less often	2,566	17.1%
Don't know	77	0.5%

Table 4c: How often do you generally LISTEN AGAIN to the radio via the internet?		
Sample size = 913	('000s)	(%)
Base = all LISTEN AGAIN via internet	13,464	100%
Several times a day	378	2.8%
Everyday/most days	1,058	7.9%
2-3 days per week	2,732	20.3%
About once a week	3,416	25.4%
About once a month	3,025	22.5%
Less often	2,777	20.6%
Don't know	76	0.6%

Listen Live

Asked what other online activity they tend to do (most of the time) when listening live via the internet, almost half said they work or check their emails, while 19% use a social networking website.

Table 5: What other online activity do you generally do when you LISTEN LIVE to the radio via the internet (most of the time)		
Sample size = 998	'000s	%
Base = all LISTEN LIVE via internet	14,977	100%
Work on the computer	6,970	46.5%
Check my emails	6,805	45.4%
Browse the internet	5,592	37.3%
Use a social networking website (e.g. Facebook, Myspace)	2,837	18.9%
Read sports/news/weather	2,776	18.5%
Use online banking facilities	2,015	13.5%
Play a computer game	1,501	10.0%
I am not using the computer for anything else than listening to the radio	656	4.4%

Listen Again

Those who said they have used a Listen Again service were asked about the programmes they had listened to in the past seven days. Approximately half of this sample listened to 1 or 2 programmes, with the average coming in at 1.65.

Table 6: Number of Listen Again programmes in past 7 days		
Sample size = 913	'000s	%
Base = All who Listen Again	13,464	100%
0	3,763	27.9%
1	3,932	29.2%
2	2,799	20.8%
3	1,542	11.5%
4	611	4.5%
5	300	2.2%
6+	519	3.9%
Mean (excludes not stated)	1.65	

We asked the Listen Again audience some questions about the impact that Listen Again had on their listening to live radio.

On balance Listen Again had a positive effect on overall listening, with 13.2% claiming to listen to more live radio since discovering Listen Again, and 12.2% listening less, although only 2.7% claimed to be listening to significantly less live radio. The vast majority (72.1%) said it had no effect either way.

Table 7: Since you started listening after the original time of broadcast (Listen Again), how would you say your live radio habits have changed?		
Sample size = 913	('000s)	(%)
Base = all who Listen Again	13,464	100%
I now listen to...		
(5) ...much more live radio	246	1.8%
(4) ...more live radio	1,528	11.3%
(3) ...just as much as before	9,710	72.1%
(2) ...less live radio	1,278	9.5%
(1) ...much less live radio	366	2.7%
Mean score out of 5	3.0	

Furthermore, almost half of Listen Again listeners (46%, or 6.2 million) say they now listen to radio programmes that they didn't previously listen to as a result of the Listen Again service.

Table 8: Have you started listening to radio programmes you didn't previously listen to as a result of using Listen Again online?		
Sample size = 913	('000s)	(%)
Base = all who Listen Again	13,464	100%
Yes	6,196	46.0%
No	6,777	50.3%

Personalised Online Radio (POR)

Personalised Online Radio is an online service that uses a music recommendation system. Intelligent software selects music for listeners based on their personal likes and dislikes. Users can skip tracks they don't like and rate those that they do like, allowing the software to refine its selection accordingly. Some of the better known examples are Last FM and Pandora (although the latter's availability in the UK is currently suspended).

Asked if they were aware of such services, 38.1% of MIDAS respondents (6.4 million) said that they were.

People who said they were aware of POR were asked how often they used it. The total number of POR users is just shy of 3 million, with 1.4 million (48% of POR users) using at least once a week.

Sample size = 162	('000s)	(%)
Base = All POR users	2,855	100%
Use several times a day	149	5.2%
Use everyday / most days	295	10.3%
Use 2-3 times per week	334	11.7%
Use about once a week	599	21.0%
Use about once a month	568	19.9%
Use less often	858	30.1%
Varies	52	1.8%

All users were asked if POR had changed how much conventional radio they listened to.

Sample size = 162	('000s)	(%)
Base = All POR users	2,855	100%
I now listen to...		
(5) ...much more live radio	76	2.7%
(4) ...more live radio	124	4.3%
(3) ...just as much as before	1,834	64.2%
(2) ...less live radio	482	16.9%
(1) ...much less live radio	165	5.8%
Mean score out of 5	2.8	

For 71.2% of users, POR has not eroded their traditional radio listening, however 5.8% admitted listening to much less.

WiFi Radio

Respondents were asked if they had heard of WiFi Radio, a new type of radio set that connects wirelessly to the internet and allows users to listen to all internet radio, live and on-demand. Almost 7 million are aware of such sets but only half a million claimed to own one (please note that this last result is based on 37 respondents and therefore should be treated with caution).

Table 11: WiFi radio awareness and ownership		
Sample size = 1,090	('000s)	(%)
Base = all listening via internet	16,061	100%
Are you aware of WiFi Radio?		
Yes	6,754	42.1%
No	9,307	57.9%
Do you own a WiFi radio?		
Yes	542	3.4%
No	15,519	96.6%



Media Players and Software

All MIDAS respondents (i.e. everyone who listens to radio via the internet or downloads podcasts) were asked which media player software they use to organise music and/or audio on their PCs at home and at work.

At home, iTunes came out on top, being mentioned by 8.4 million users versus 8.2 million for Windows Media Player. RealPlayer was mentioned by 4.8 million.

At work, the majority of respondents (67%) don't organise music on their computer. For those who do, Windows Media Player was the preferred software with 3.1 million users, followed by iTunes with 1.8 million users.

Table 12: Which media player software do you use to organise music / audio on your computer? (Top 3 answers)				
Sample size = 16,854	At Home		At Work	
	'000s	%	'000s	%
Base = All respondents	1,142	100%		100%
iTunes	8,376	49.7%	1,840	10.9%
Windows Media Player	8,213	48.7%	3,145	18.7%
RealPlayer	4,756	28.2%	1,307	7.8%
Other	3,650	21.7%	954	5.7%
I just copy and paste / drag and drop files between folders and devices	1,824	10.8%	705	4.2%
I don't organise music / audio on computer	2,554	15.2%	11,270	66.9%

Podcasts

A total of 7.2 million people have ever downloaded podcasts, representing 14.2% of the UK adults 15+ population. However 2.3 million are lapsed users.

2.2 million have downloaded a vodcast (video podcast) and 1.1 million have downloaded an enhanced podcast (i.e. with chapters and pictures).

Table 13: Do you ever download podcasts?		
Sample size = 1,142	'000s	%
Base = All respondents	16,854	100%
YES, I currently download podcasts	5,214	30.9%
– standard podcasts	4,706	27.9%
– enhanced podcasts	869	5.2%
– video podcasts	1,688	10.0%
YES, I have downloaded podcasts in the past, but I don't any more	2,309	13.7%
– standard podcasts	1,904	11.3%
– enhanced podcasts	220	1.3%
– video podcasts	547	3.2%
TOTAL YES	7,206	42.8%
No	9,361	55.5%
Don't know	288	1.7%

Podcasts remain a fairly new activity for most users, with 43% having only started doing so in the last year.

Table 14: When did you start listening to podcasts?		
Sample size = 448	'000s	%
Base = All who ever download podcasts	7,206	100%
In the last month	259	3.6%
Between 1 and 6 months ago	1,131	15.7%
Between 6 months and a year ago	1,722	23.9%
Between a year and 2 years ago	2,396	33.3%
Between 2 and 3 years ago	1,345	18.7%
Longer than 3 years ago	318	4.4%
Don't know	33	0.5%

4.1 million listen to podcasts at least weekly.

Table 15: How often do you generally listen to podcasts?		
Sample size = 448	'000s	%
Base = All who ever download podcasts	7,206	100%
several times a day	264	3.7%
everyday	727	10.1%
2-3 days per week	1,121	15.6%
about once a week	2,016	28.0%
about once a month	1,366	19.0%
less often	1,668	23.1%
don't know	42	0.6%

Types of podcast

Asked what types of podcast they were interested in, 3.9 million opted for Comedy. Next came Music (2.7m), TV & Film (just over 2m) and News & Politics (just under 2m). However, when asked which particular types of podcast they actually subscribed to, there were slight differences with News & Politics claiming the third place ahead of TV & Film and Technology.

Table 16: What types of podcast are you interested in?				
	Interested in....		Subscribe to...	
Sample size = 448	'000s	% (Rank)	'000s	% (Rank)
Base = All who ever download podcasts	7,206	100%	7,206	100%
Comedy	3,925	54.5%	2,549	35.4%
Music	2,737	38.0%	1,465	20.3%
TV and Film	2,020	28.0%	780	10.8%
News & Politics	1,976	27.4%	873	12.1%
Technology	1,821	25.3%	789	10.9%
Arts	1,547	21.5%	563	7.8%
Science & Medicine	1,400	19.4%	607	8.4%
Sports and Recreation	1,280	17.8%	575	8.0%
Education (e.g. languages)	1,151	16.0%	674	9.4%
Society & Culture	1,138	15.8%	488	6.8%
Business	1,137	15.8%	590	8.2%
Games and Hobbies	883	12.3%	362	5.0%
Health	555	7.7%	203	2.8%
Religion & Spirituality	512	7.1%	200	2.8%
Government & Organisations	406	5.6%	129	1.8%
Kids and Family	381	5.3%	124	1.7%

Podcasts in General

The BBC is the biggest podcast supplier with almost 60% reach within the podcasting community. It is often difficult for users to correctly identify the podcast producer, with some personalities self-recording podcasts (e.g. Stephen Fry, Ricky Gervais) whereas others are produced and distributed by different brands, including non-media brands (e.g. Zane Lowe for MTV and BBC Radio 1 or Adam & Joe for BBC 6 Music and previously for Xfm and for Coke Music).

Table 17: Do you subscribe to any podcasts from any of the following suppliers?		
Sample size = 448	'000s	%
Base = All who ever download podcasts	7,206	100%
BBC	4,263	59.2%
UK commercial radio stations	350	4.9%
UK newspapers	738	10.2%
foreign/international radio stations	411	5.7%
A famous person / personality	956	13.3%
An amateur individual	511	7.1%
Other	1,395	19.4%
Don't Know	1,735	24.1%

Overall, podcast users subscribe to an average of 4.4 podcasts, and over half subscribe to between 1 and 5 podcasts.

Table 18: How many podcasts do you currently subscribe to?		
Sample size = 448	'000s	%
Base = All who ever download podcasts	7,206	100%
1	1,916	26.6%
2	1,051	14.6%
3	526	7.3%
4	324	4.5%
5	183	2.5%
1-5	4,000	55.5%
6-10	572	7.9%
11+	459	6.4%
Mean (excludes not stated)	4.41	

Respondents were asked what proportion of the individual podcast episodes they normally manage to listen to. Almost 60% claimed that they usually listen to the whole episode, and a quarter said they listened to most of it.

Table 19: In general, what proportion of an episode do you normally listen to?		
Sample size = 448	'000s	%
Base = All who ever download podcasts	7,206	100%
The whole episode	4,225	58.6%
Most of it	1,928	26.8%
About half	207	2.9%
Less than half	127	1.8%
None	374	5.2%
It varies widely	160	2.2%
Don't know	185	2.6%

Only 27% of podcast users have time to listen to all the podcasts they have downloaded in an average week, with another 30% listening to half of them or less.

Table 20: In an average week, roughly what proportion of all podcast episodes that you download do you actually get round to listening to?		
Sample size = 448	'000s	%
Base = All who ever download podcasts	7,206	100%
All of them	1,969	27.3%
Most of them	2,458	34.1%
About half of them	985	13.7%
Less than half of them	1,208	16.8%
None of them	159	2.2%
Don't know / Not applicable	426	5.9%

Respondents were next asked if they ever listen to podcast episodes that are more than a week old. 77.5% said that they do.

Software

The most popular software used to download and play podcasts is iTunes, which was chosen by two third (68.8%) of podcast users. However almost 17% download directly from websites.

Table 21: What software program do you use to subscribe to podcasts?		
Sample size = 448	'000s	%
Base = All who ever download podcasts	7,206	100%
iTunes	4,961	68.8%
QuickTime	287	4.0%
Mozilla	286	4.0%
Juice	179	2.5%
Playstation portable	151	2.1%
Directly via website/browser	1,210	16.8%
Other	290	4.0%

Hardware

10.3% of podcast users subscribe to the same podcasts on more than one computer (for example, at home and at work).

Despite the portability of a podcast, three quarters of users listen directly on their personal computer. Two third do copy them on portable devices (e.g. iPods or other digital audio players) to listen on the go. The following table shows the devices used in order of preference.

Table 22: On which of the following do you listen to podcast episodes?		
Sample size = 448	'000s	%
Base = All who ever download podcasts	7,206	100%
Home computer (PC/Mac)	5,394	74.9%
Portable mp3/digital audio player	4,734	65.7%
Mobile phone	655	9.1%
Through a home hi-fi	401	5.6%
Other	748	10.4%

Podcast Listening Behaviour

Four out of five (79%) podcast users like to listen to podcasts at home – that’s 5.7 million adults. Combined, listening in the car or on public transport account for 45% of answers.

Table 23: Where do you normally listen to podcasts?		
Sample size = 448	'000s	%
Base = All who ever download podcasts	7,206	100%
At home	5,669	78.7%
At work	1,451	20.1%
In the car	1,803	25.0%
On public transport	2,074	28.8%
Whilst walking	1,627	22.6%
Whilst exercising	803	11.1%

During the week, the late afternoon and evening are the favourite times of day to listen to podcasts, although there is a significant level of listening throughout the day.

Table 24a: WEEKDAYS - When do you normally listen to podcasts?		
Sample size = 448	'000s	%
Base = All who ever download podcasts	7,206	100%
Early morning (6am-9am)	1,581	21.9%
Mid morning (9am-12pm)	1,015	14.1%
Lunchtime (12pm-2pm)	892	12.4%
Early afternoon (2pm-4pm)	1,097	15.2%
Afternoon/early evening (4pm-7pm)	1,958	27.2%
Evening (7pm-midnight)	2,779	38.6%
Overnight	384	5.3%
Don't know	976	13.5%

During the weekend, as one would expect, there is very little listening taking place before 9am. Again the peak of listening is in the evening, although the high level of “don’t know” compared with weekdays indicates that listening time varies a lot more during the weekend.

Table 24b: SATURDAY - When do you normally listen to podcasts?		
Sample size = 448	'000s	%
Base = All who ever download podcasts	7,206	100%
Early morning (6am-9am)	346	4.8%
Mid morning (9am-12pm)	832	11.5%
Lunchtime (12pm-2pm)	637	8.8%
Early afternoon (2pm-4pm)	801	11.1%
Afternoon/early evening (4pm-7pm)	1,019	14.1%
Evening (7pm-midnight)	1,415	19.6%
Overnight	391	5.4%
Don't know	1,203	16.7%

Table 24c: SUNDAY - When do you normally listen to podcasts?		
Sample size = 448	'000s	%
Base = All who ever download podcasts	7,206	100%
Early morning (6am-9am)	340	4.7%
Mid morning (9am-12pm)	613	8.5%
Lunchtime (12pm-2pm)	580	8.0%
Early afternoon (2pm-4pm)	891	12.4%
Afternoon/early evening (4pm-7pm)	1,042	14.5%
Evening (7pm-midnight)	1,426	19.8%
Overnight	353	4.9%
Don't know	1,280	17.8%

For most people, the freedom to listen when they want is perceived as the main benefit of podcasts, with almost 60% citing this as their top answer and a total of 89% including it in their top 3 benefits. Being able to hear radio shows that they have missed is the second biggest benefit – a quarter mentioned this as their main reason. Sound quality was not considered to be a benefit, nor was the ability to share programme content with friends – only 8% and 4% respectively counted these factors among the benefits.

Table 25: What are the 3 main benefits of downloading podcasts for you?				
Sample size = 448	Main Benefit		All Mentions	
	'000s	%	'000s	%
Base = All who ever download podcasts	7,206	100%	7,206	100%
I can listen when I want	4,229	58.7%	6,402	30.5%
I can transfer files to a portable device (e.g. iPod, Mobile Phone)	640	8.9%	3,364	16.0%
I can hear shows I missed on the radio	1,810	25.1%	5,293	25.2%
Good sound quality	21	0.3%	609	2.9%
I can listen more than once	115	1.6%	2,075	9.9%
I can collect audio files for listening in future	171	2.4%	1,353	6.4%
I can share them with friends	0	0.0%	322	1.5%
I can fast forward and rewind the programme	10	0.1%	1,571	7.5%

Deleting and Unsubscribing

A podcast differs from a standard audio file for its use of RSS (Really Simple Syndication) feed technology. This means that once a podcast has been subscribed to, and until the recipient decides to unsubscribe, subsequent episodes will be flagged and in most cases automatically delivered to the podcast subscriber.

A majority of podcast users (54%) said that they normally delete the file after they have listened to a podcast.

Table 26: After listening to a podcast, do you normally delete it?		
Sample size = 448	'000s	%
Base = All who ever download podcasts	7,206	100%
Yes	3,890	54.0%
No	2,998	41.6%
Don't know	318	4.4%

Asked why they might keep some podcasts after they have listened, the two biggest answers were to listen to them again in the future, and to keep a collection.

Table 27: Why do you normally keep at least some podcast episodes?		
Sample size = 200	'000s	%
Base = All who do not delete	3,316	100%
To listen to them again in the future	2,238	67.5%
To keep a collection	963	29.0%
To edit/use audio for own purposes	80	2.4%
To send to friends	40	1.2%

Almost half of the sample have never unsubscribed from a podcast.

Table 28: Have you ever unsubscribed from a podcast?		
Sample size = 448	'000s	%
Base = All who ever download podcasts	7,206	100%
Yes	3,538	49.1%
No	3,078	42.7%
Don't know	589	8.2%

Those that have unsubscribed were asked why they had done so. The majority of responses indicate a lack of time or interest, with half saying they got bored with it, and 28% losing interest in the subject. 52% simply couldn't find time to listen.

Table 29: Why did you unsubscribe from a podcast?		
Sample size = 209	'000s	%
Base = All who have unsubscribed	3,538	100%
I couldn't find time to listen	1,827	51.6%
I got bored of the content	1,713	48.4%
No longer interested in subject	982	27.8%
Quality was not good enough	333	9.4%
Podcast was not updated often enough / updated too often	332	9.4%
Podcast was too short / too long	146	4.1%
I ran out of hard disk space	116	3.3%

Three quarter of users say they listen to just as much live radio as before they started listening to podcasts.

Table 30: Since you started listening to podcasts, how would you say your live radio listening habits have changed?		
Sample size = 448	('000s)	(%)
Base = All who ever download podcasts	7,206	100%
I now listen to...		
(5) ...much more live radio	150	2.1%
(4) ...more live radio	484	6.7%
(3) ...just as much as before	5,377	74.6%
(2) ...less live radio	881	12.2%
(1) ...much less live radio	147	2.0%
Mean score out of 5	2.94	

35% of podcast users say that they now listen to radio programmes that they didn't previously listen to as a result of downloading podcasts.

Paying for a podcast

Only 232,000 people (3.2% of podcast users) said that they had paid to subscribe to a podcast, and only 1.1 million (16% of podcast users) said that they would ever be willing to pay for any.

Asked to think about how podcasts might be paid for in future, there was some interest in advert-sponsored content, with more than half (54.6 %) of podcast users expressing interest.

Table 31a: In the future, how interested would you be in downloading a free podcast containing adverts?		
Sample size = 448	('000s)	(%)
Base = All who ever download podcasts	7,206	100%
Very interested	1,017	14.1%
Quite interested	2,918	40.5%
Not very interested	1,690	23.5%
Not interested	1,289	17.9%
Don't know	291	4.0%

However, there was far less interest in paid-for podcasts, even without advertising. Only 32.5% answered positively, with almost 62% saying they had little or no interest.

Table 31b: In the future, how interested would you be in downloading a paid-for podcast but without adverts?		
Sample size = 448	('000s)	(%)
Base = All who ever download podcasts	7,206	100%
Very interested	560	7.8%
Quite interested	1,779	24.7%
Not very interested	2,203	30.6%
Not interested	2,250	31.2%
Don't know	413	5.7%

Respondents were asked if they thought they would download more podcasts if they could contain full-length music tracks. (Currently, music right holders greatly limit what music can be used on podcasts, which leads to music being removed altogether from the majority of radio programmes made available as a podcast.) There was significant interest (64%) in such podcasts if they were free, but support slipped away dramatically (down to 11.1%) at the prospect of having to pay for them. Interestingly, 28% of podcast users didn't know if they would pay for such music content or not.

Table 32: If podcasts could contain music, would you download more?		
Sample size = 448	('000s)	(%)
Base = All who ever download podcasts	7,206	100%
If they were free...		
Yes	4,613	64.0%
No	1,665	23.1%
Don't know	927	12.9%
If you had to pay a fee...		
Yes	803	11.1%
No	4,355	60.4%
Don't know	2,047	28.4%

Duration of use last week

Finally we asked respondents to quantify how much time they had spent last week on each of the online listening activities.

Asking people for a minute-perfect assessment of the time they spent using each service was deemed impractical so instead, they were asked to select the time-band that best reflected their consumption in the last week. By taking the mid point in the estimations, we are able to calculate an approximate average duration. This figure can then be extrapolated on the total UK adults 15+ population by counting the rest of the population as non-users.

Of those who listen live to the radio online, 45% spent less than 30 minutes doing so in the previous week. Taking the mid-point estimate, the average time spent in the last week is just under 77 minutes.

Table 33a: Duration of use last week – Listen live to radio programmes online			
Sample size = 998	Online Live listeners (000s)	% Online Live listeners	% All adults
			100%
Base = all LISTEN LIVE via internet	14,977	100%	29.5%
Not at all	4,423	29.5%	79.2%
Less than 30 minutes (15)	2,308	15.4%	4.5%
30 minutes to an hour (45)	2,367	15.8%	4.7%
1-2 hours (90)	2,315	15.5%	4.6%
2-3 hours (150)	1,012	6.8%	2.0%
3-5 hours (240)	1,144	7.6%	2.3%
> 5 hours (300)	1,201	8.0%	2.4%
Not sure	207	1.4%	0.4%
Average minutes in last week (without "don't know")		76.9 mins	16.0 mins

Of those who use Listen Again facilities, 50% spent less than 30 minutes doing so in the previous week and the average time spent in the last week is just under 55 minutes.

Table 33b: Duration of use last week – Listen Again to radio programmes online			
Sample size = 913	Listen Again users (000s)	% Listen Again users	% All adults
			100%
Base = All who Listen Again	13,464	100%	26.5%
Not at all	4,698	34.9%	82.7%
Less than 30 minutes (15)	1,974	14.7%	3.9%
30 minutes to an hour (45)	2,494	18.5%	4.9%
1-2 hours (90)	2,133	15.8%	4.2%
2-3 hours (150)	877	6.5%	1.7%
3-5 hours (240)	452	3.4%	0.9%
> 5 hours (300)	471	3.5%	0.9%
Not sure	363	2.7%	0.7%
Average minutes in last week (without "don't know")		54.6 mins	9.4 mins

Of those using Personalised Online Radio services, 60% spent less than 30 minutes doing so and the average time spent in the last week is 46.5 minutes.

Table 33c: Duration of use last week – Personalised Online Radio			
Sample size = 162	POR users (000s)	% POR users	% All adults
			100%
Base = All POR users	2,855	100%	5.6%
Not at all	1,369	48.0%	97.1%
Less than 30 minutes (15)	352	12.3%	0.7%
30 minutes to an hour (45)	328	11.5%	0.6%
1-2 hours (90)	242	8.5%	0.5%
2-3 hours (150)	171	6.0%	0.3%
3-5 hours (240)	123	4.3%	0.2%
> 5 hours (300)	92	3.2%	0.2%
Not sure	177	6.2%	0.3%
Average minutes in last week (without “don’t know”)		46.5 mins	1.4 mins

Of those using podcasts, 46% spent less than 30 minutes doing so and the average time spent in the last week is just over an hour (62.1 minutes).

Sample = 448	Podcast users (000s)	% Podcast users	% All adults
			100%
...ever downloading podcasts...	7,206	100%	14.2%
Not at all	2,501	34.7%	90.7%
Less than 30 minutes (15)	837	11.6%	1.6%
30 minutes to an hour (45)	1,389	19.3%	2.7%
1-2 hours (90)	1,174	16.3%	2.3%
2-3 hours (150)	421	5.8%	0.8%
3-5 hours (240)	395	5.5%	0.8%
> 5 hours (300)	329	4.6%	0.6%
Not sure	160	2.2%	0.3%
Average minutes in last week (without "don't know")		62.1 mins	5.8 mins

Extrapolating each of the average minutes on the total adult 15+ population, we can gauge the relative importance of each of the internet listening activity covered by this survey. Listen Live is the most popular activity with an average listening time of 16 minutes, and POR is still a marginal activity with only 1.4 minutes spent by UK adults in the last week.

	All Adults 15+
Base (000s):	50,344
Listen Live	16.0 mins
Listen Again	9.4 mins
POR	1.4 mins
Podcasts	5.8 mins

Demographic profile of each group

Finally this table shows the demographic repartition of each group indexed by the Adult 15+ population repartition. All groups show a strong bias towards male, 15-34 and ABC1.

Table 35: Demographic profile of each group indexed on the total Adult 15+ UK population							
	15-34	35-44	55+	Male	Female	ABC1	C2DE
LISTEN VIA INTERNET	154	110	39	119	82	142	50
- Listen Live	159	108	36	122	79	142	50
- Listen Again	155	109	40	122	79	143	48
POR	199	94	15	150	53	135	58
Podcast users	174	106	24	134	68	154	36