

INTRODUCTION

MIDAS Autumn 2015

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 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. It also reveals 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 (**AM/FM Share = 47%, DAB = 35%**). Devices connected to the internet have a much smaller share of listening hours (**Any TV 6%, Desktop/Laptop 4%, Smartphone 2% and Tablets 0.4%**)

APPS



Radio Apps are popular amongst radio listeners - **22.4 million or 42%** of the UK population have downloaded a Radio App, including **4.2 million (52%)** of 15-24 year olds and **5.1 million (58%)** of 25-34 year olds. Over half of all users who download a Radio App use it on a weekly basis.

PODCASTING

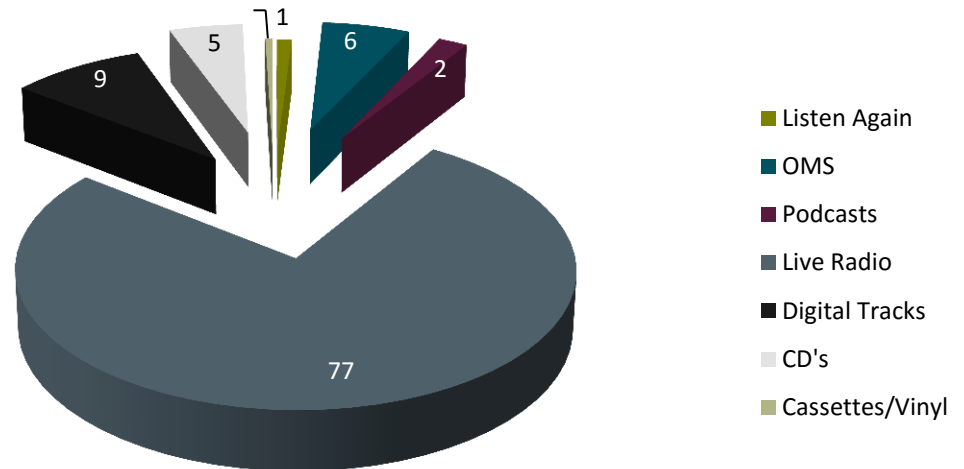
3.7 million adults use any Podcast, whether it be Speech or Music. The Smartphone is the most popular way to listen to a Podcast with a reach of **54%** (Adults 15+). Almost two thirds of all Podcasts downloaded are listened to (**62%**).

LISTEN AGAIN

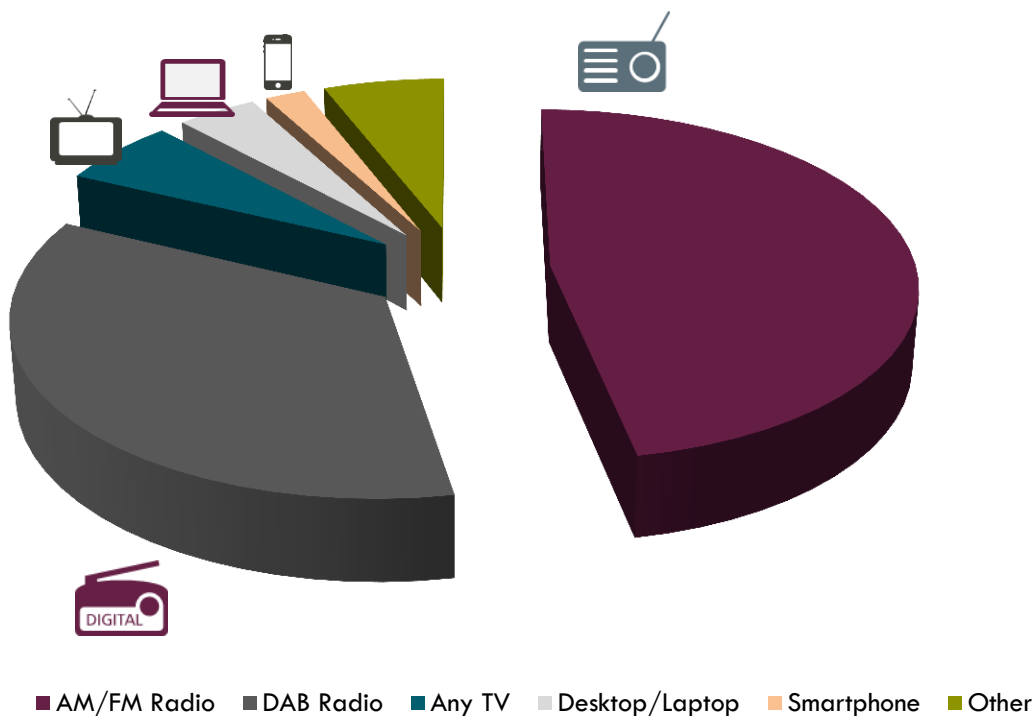


4.3 million adults use the 'listen again' function. Desktops/Laptops are the device of choice with **42% share** of all 'listen again' listening hours. **82%** of all 'listen again' hours are listened to in Home. **83%** of Listen Again/Catch Up Radio hours are listened to alone.

AUDIO SHARE OF EAR % (excluding visual)



LIVE RADIO Listening by Device (Share %)



When it comes to listening to Live Radio, the traditional AM/FM radio has the highest 'share' of listening with **47%**.
Listening via a DAB set has the second highest share of listening hours with **35%**.
Listening via any TV **6%**, Laptop/Desktop **4%** and Smartphone **2%**.
"Other" devices include Tablets, Digital Music players and Wi-Fi Radios. This is based on the All Adults 15+ sample.



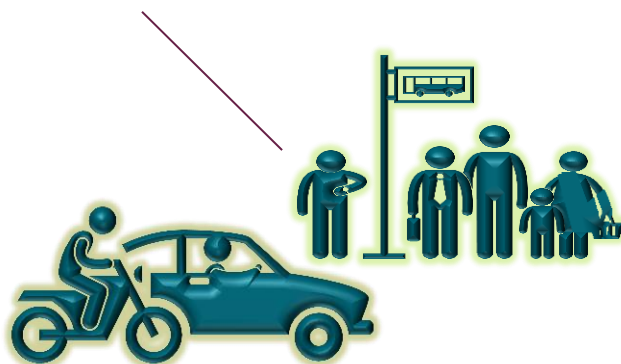
LIVE RADIO Listening by Activities (Share%) All Adults

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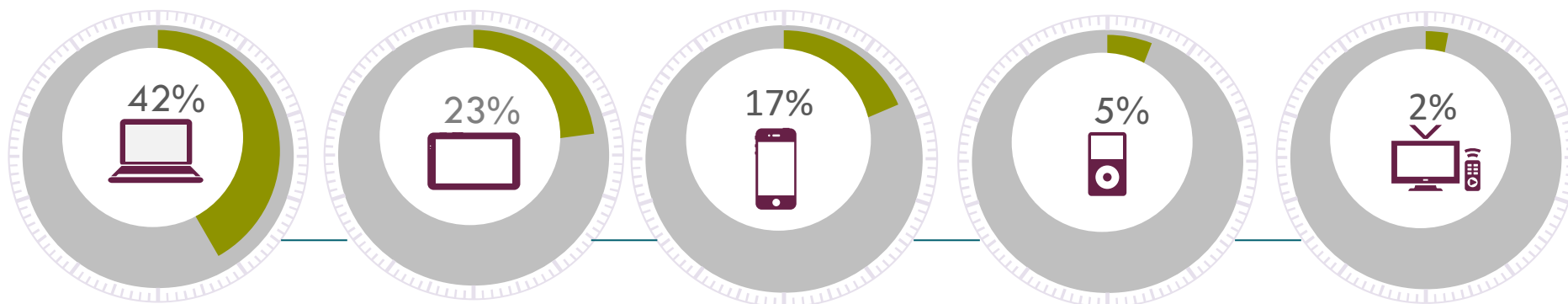
Both undertaking 'Household Chores' or simply 'Relaxing' each represent a 'share' of **14%** of 'Live Radio' listening hours.

Working or Studying has the highest share of listening with almost a quarter (**24%**), followed by Eating/Cooking with a share of **10%**.

20% of live radio hours are listened to whilst the listener is travelling somewhere...



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



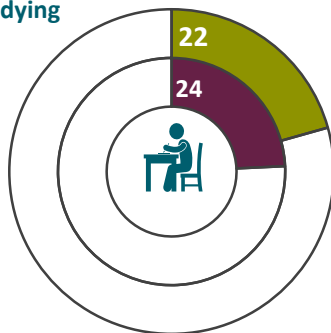
A Laptop or Desktop computer is the most favoured device to listen to 'Listen Again' or 'Catch Up' radio, with a **42%** share of hours. Listening via a Tablet represents almost a quarter of listening (**23%**). Smartphones have a share of **17%**, with Digital Music players (**5%**) and TVs (**2%**) equating to much smaller share of hours.



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

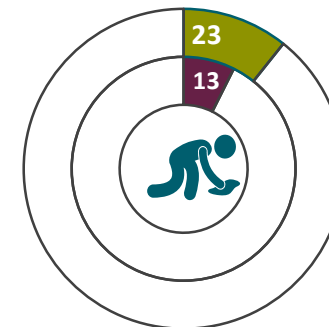
Working/Studying

■ Reach%
■ Share%



Household Chores

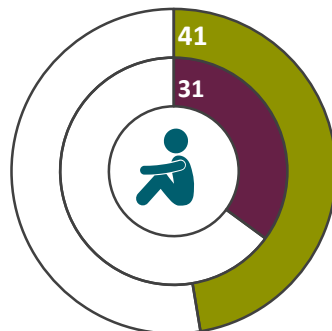
■ Reach%
■ Share%



Relaxing and Working/Studying are the most popular activities whilst engaging in 'Listen Again' services with the highest Reach and Share of Hours.

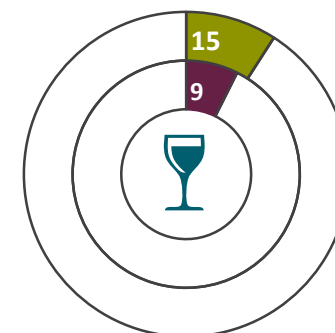
Relaxing

■ Reach%
■ Share%



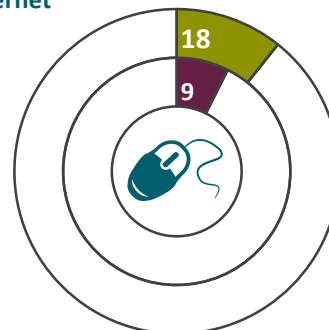
Eating/Drinking/Cooking

■ Reach%
■ Share%



Using the Internet

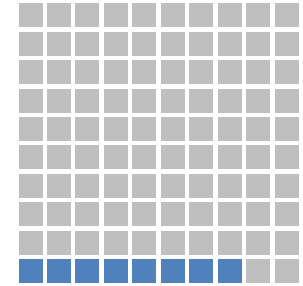
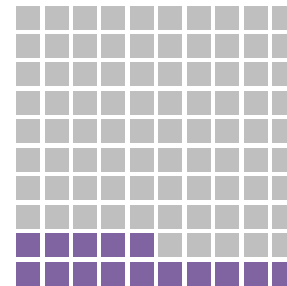
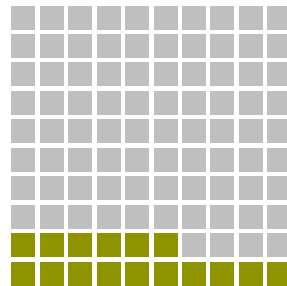
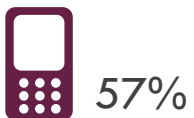
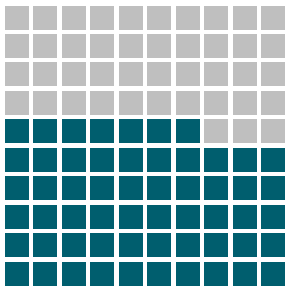
■ Reach%
■ Share%



PODCASTS by Device (Share %)



Listening to a Podcast is an activity normally undertaken alone so naturally we see connected mobile devices being used more frequently - Smartphones have a **57%** share of Podcast listening hours, while Laptops/Desktops have a share of **16%**, Digital Music players **15%** and Tablets **8%**.



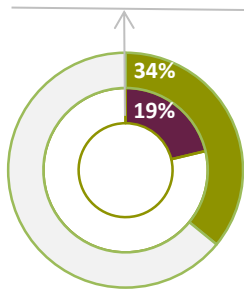
PODCASTS by Activity (Reach and Share %)



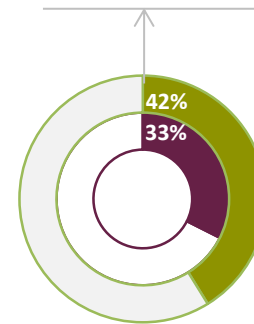
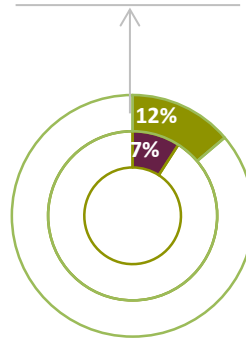
Engaging in Sports, Exercise or Hobbies has a Reach of **12%** and a **7%** Share of all Podcasting hours.



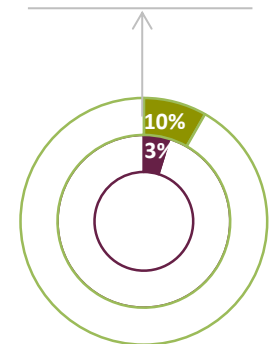
Activities in the kitchen like eating, drinking or cooking has a smaller Share of the hours with **3%**, yet accounts for **10%** Reach among Podcasters.



Relaxing or Doing Nothing in Particular has **34%** Reach and almost a fifth of the Share of Podcast listening hours with **19%**.



It appears Podcasts are a popular accompaniment on a journey - Driving or Travelling has a Reach of **42%** and a **33%** Share of Podcasting Hours.



Listener Profiles

'Listen Again' services
favour listeners aged
35-54.

65%
of people that
listen to Podcasts
are Male.

50%
of Live Radio
listening hours are
done alone.

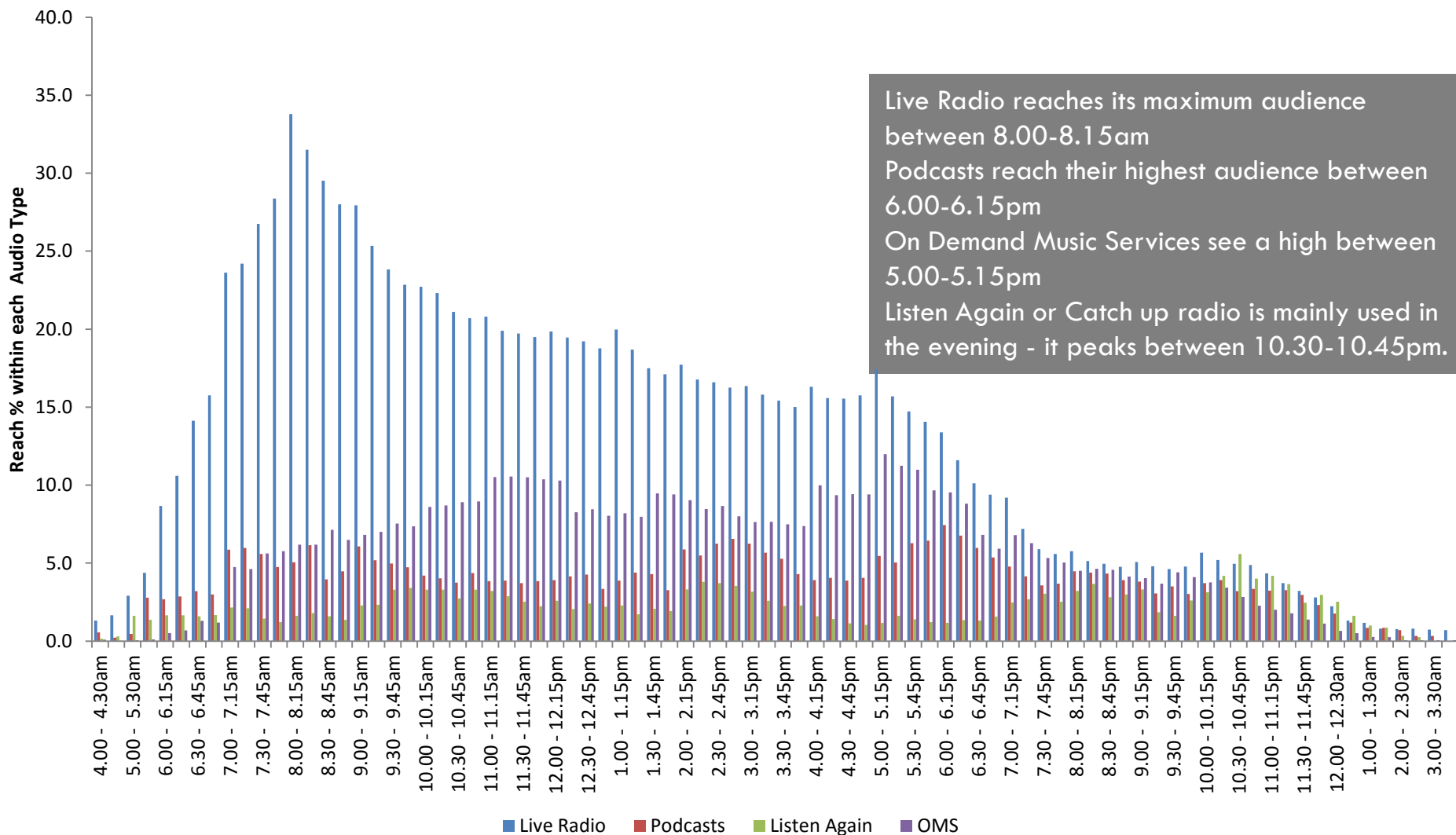
52%
of those who
downloaded a
radio app use it
at least once per
week

10.6 million
people have ever
used Radioplayer



Time of Day Listening takes place – MONDAY to FRIDAY average

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Sample comprised 2326 re-contacted respondents from the main RAJAR Survey

Fieldwork was conducted during November 2015

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