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 Autumn 2019. The sample comprised of 2238 former RAJAR respondents willing to be re-contacted. MIDAS is collected via an Online diary and Questionnaire. Autumn 2019 fieldwork took place during July/August. Demographic split’s of the following information is available on request. List of diary variables can be found on the back page of these charts.

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

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

Podcasting and On Demand slightly tip toward Males but more Females listen to live and catch up radio.
ALL ADULTS 15+ Weekly Reach % and Hours in 000,000s

<table>
<thead>
<tr>
<th>Year</th>
<th>Listen Again Reach</th>
<th>OMS Reach</th>
<th>Podcasts Reach</th>
<th>CDs / Cassette Reach</th>
<th>Digital Tracks Reach</th>
</tr>
</thead>
<tbody>
<tr>
<td>Autumn 15</td>
<td>16</td>
<td>77.3</td>
<td>22.9</td>
<td>76.1</td>
<td>113</td>
</tr>
<tr>
<td>Autumn 16</td>
<td>23.6</td>
<td>100.4</td>
<td>29.3</td>
<td>80.5</td>
<td>130.6</td>
</tr>
<tr>
<td>Autumn 17</td>
<td>14.3</td>
<td>109.4</td>
<td>33.1</td>
<td>64.2</td>
<td>109.7</td>
</tr>
<tr>
<td>Autumn 18</td>
<td>23.8</td>
<td>135.8</td>
<td>43.3</td>
<td>53.1</td>
<td>97.0</td>
</tr>
<tr>
<td>Autumn 19</td>
<td>25.1</td>
<td>162.2</td>
<td>9.3</td>
<td>41.8</td>
<td>17.5</td>
</tr>
</tbody>
</table>

Listen Again – 5,145
On Demand – 15,228
Podcasts – 9,392
CDs – 9,633
Digital Tracks – 9,639
22% of live radio hours are listened to whilst Driving/Travelling.

79% of new music discoverers still consider the Radio to be important for finding new stuff.
Over half (53%) 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 57%, in vehicle 23%, at work or place of study 18%

*1% elsewhere
Listen Again or Catch Up is mainly going back and listening to a once live speech based radio programme.
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 22% and PC/Laptop 26%.

4.8 Million

‘Listen Again’ users claim to listen to more Live Radio since they started using Catch Up services.
LISTEN AGAIN via LOCATION (Share) and WHO WITH

- **Home**: 71%
- **Car/Van/Lorry**: 11%
- **Work/Place of Study**: 11%
- **Public Transport/Walking**: 6%

*1% Elsewhere

87% of Catch Up or Listen Again radio hours are spent listening on a person's own, only 7% with a partner or spouse and 6% with others.

71% of Catch Up radio listening is done at Home.
67% of Podcast listeners listen to the whole episode and 68% listen to mostly all of the episodes they download.
Smartphones are the preferred device for listening to Podcasts with a share of 63% of the listening hours.
Podcasting is almost always a solo activity, with a share of 91%.
On Demand Music by Activity
REACH %

- Driving/ Travelling: 40%
- Working/ Studying: 29%
- Household Chores: 28%
- Eating/ Drinking/ Cooking: 25%
- Sport/ Exercise/ Hobbies: 19%
- Socialising: 16%
- Working/ Dressing: 14%
- Social Media: 12%
- 6%

31% of On Demand Music hours listening to whilst working/studying

17m use a Premium On Demand Music Service
On Demand Music by DEVICE

REACH%

75% 22% 21%

SHARE%

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Desktop/Laptop computer</th>
<th>Tablet</th>
<th>Smartphone</th>
<th>Voice Activated Speaker</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>all adults</td>
<td>61</td>
<td>8</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15-24</td>
<td>68</td>
<td>7</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25-34</td>
<td>66</td>
<td>22</td>
<td>16</td>
<td></td>
<td></td>
</tr>
<tr>
<td>35-54</td>
<td>49</td>
<td>16</td>
<td>14</td>
<td></td>
<td></td>
</tr>
<tr>
<td>55+</td>
<td>49</td>
<td>8</td>
<td>20</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Desktop/Laptop computer
- Tablet
- Smartphone
- Voice Activated Speaker
- Other
On Demand Music by LOCATION (Share) and WHO WITH

- **Home**: 49%
  - **On my own**: 63%
  - **Partner/spouse**: 12%
  - **Children (under 16)**: 6%
  - **Other**: 19%

- **Car/Van/Lorry**: 12%
  - **On my own**: 63%
  - **Partner/spouse**: 12%
  - **Children (under 16)**: 6%
  - **Other**: 19%

- **Work/Place of Study**: 22%
  - **On my own**: 63%
  - **Partner/spouse**: 12%
  - **Children (under 16)**: 6%
  - **Other**: 19%

- **Public Transport/Walking**: 8%
  - **On my own**: 63%
  - **Partner/spouse**: 12%
  - **Children (under 16)**: 6%
  - **Other**: 19%

- **Elsewhere**: 9%
  - **On my own**: 63%
  - **Partner/spouse**: 12%
  - **Children (under 16)**: 6%
  - **Other**: 19%

Listening to music services on demand is more sociable than other audio types such as Podcasting or Catch up Radio with 63% share of alone, 12% Partner/Spouse and 6% with Children.
75% 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 23%, Podcasting 1% and Audiobooks 1%.
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 44% of the listening, followed by Podcasts 18%, Live radio 15%, Digital Tracks (owned music) 12%, Catch Up Radio 6% and Audiobooks 5%.
The listening hours done via a Laptop or Desktop varies from Wave to Wave and between age groups.

Live Radio accounts for 41%, On Demand Music 26%, Podcasts 12%, Digital Tracks 10% Listen Again 5%. This is based on All Adults 15+.
### HEADPHONES

#### AUDIOTYPE By HEADPHONES

<table>
<thead>
<tr>
<th>Service</th>
<th>REACH%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Podcasts/ Downloads</td>
<td>55</td>
</tr>
<tr>
<td>Digital Tracks</td>
<td>50</td>
</tr>
<tr>
<td>Audiobooks</td>
<td>50</td>
</tr>
<tr>
<td>On Demand music services</td>
<td>49</td>
</tr>
<tr>
<td>Video Clips</td>
<td>37</td>
</tr>
<tr>
<td>Total Listen Again/Catch up radio</td>
<td>31</td>
</tr>
<tr>
<td>Live Radio</td>
<td>12</td>
</tr>
<tr>
<td>CDs</td>
<td>6</td>
</tr>
<tr>
<td>Vinyl records</td>
<td>6</td>
</tr>
</tbody>
</table>
Live Radio listening peaks at 8.00am-8.15am

Podcasting 5.15-5.30pm

Listen Again 4.15-4.30pm

On Demand Music 4.30 - 4.45pm
AUDIO TYPES include

- Any Listen Again/Catch-up radio
- On-Demand Music Services (e.g. Spotify, Apple Music,)
- Podcasts (music and speech based)
- Live Radio
- Digital Tracks (e.g. mp3, wmv, aac Music and Non Music)
- CDs
- Cassette tapes/ Vinyl records
- DVD/Video/Subcription TV
- Online Video / Audio clips (e.g. on YouTube/ Facebook)
- Any TV Viewing (Inc. Live, Catch-up and On-demand)
- Video games (consoles/ mobiles)
- Other

SUB AUDIO TYPES

- BBC/Other Radio Music-based Listen again
- BBC/Other Radio Speech-based Listen again
- On Demand Music
- Spotify/Google Play/Amazon Prime/ Apple Music/Soundcloud/Deezer
- BBC/Other Radio/ Other music podcast
- BBC/Other Radio/ Other speech podcast
- Online Video clips – Music/Non Music
  - Facebook
  - Vimeo
  - YouTube
  - Other

DEVICES include

- AM/FM Radio
- DAB Digital Radio
- Digital Media Player (e.g. iPod, Amazon Firestick, Chromecast)
- Home games console (e.g. Sony PlayStation, Nintendo Wii, Xbox)
- Any TV set
- Desktop / Laptop computer
- Mobile Phone
- Portable games console (e.g. Nintendo DS, Sony PSP)
- Record player / decks (vinyl)
- Tablet (Kindle HD / iPad / Nexus)
- Wi-Fi/ Internet Radio Set
- Voice Activated Speakers

ACTIVITIES

- Shopping
- Online purchasing
- Socialising
- Communicating
- Using the Internet (browsing)
- Household chores
- Eating/Drinking/cooking
- Sports/exercise/hobbies
- Relaxing/nothing in particular
- working/studying
- Driving / travelling
- Gaming
- Washing/Dressing
- Social Media
- Any other internet use
- Other

WHO WITH

- On my own
- Partner/spouse
- Children (under 16)
- Family member (s)
- Friends
- Colleagues
- Other people you know
- Other people you don’t know

LOCATION OF LISTENING

- At Home
- Car/van/lorry/
- At work/elsewhere
- Public Transport/ walking