

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 Winter 2019. The sample comprised of 2320 former RAJAR respondents willing to be re-contacted. MIDAS is collected via an Online diary and Questionnaire. Winter 2019 fieldwork took place during October/November. 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. All the key metrics of the data are based on an average weekly basis.

The following charts are displayed as follows;

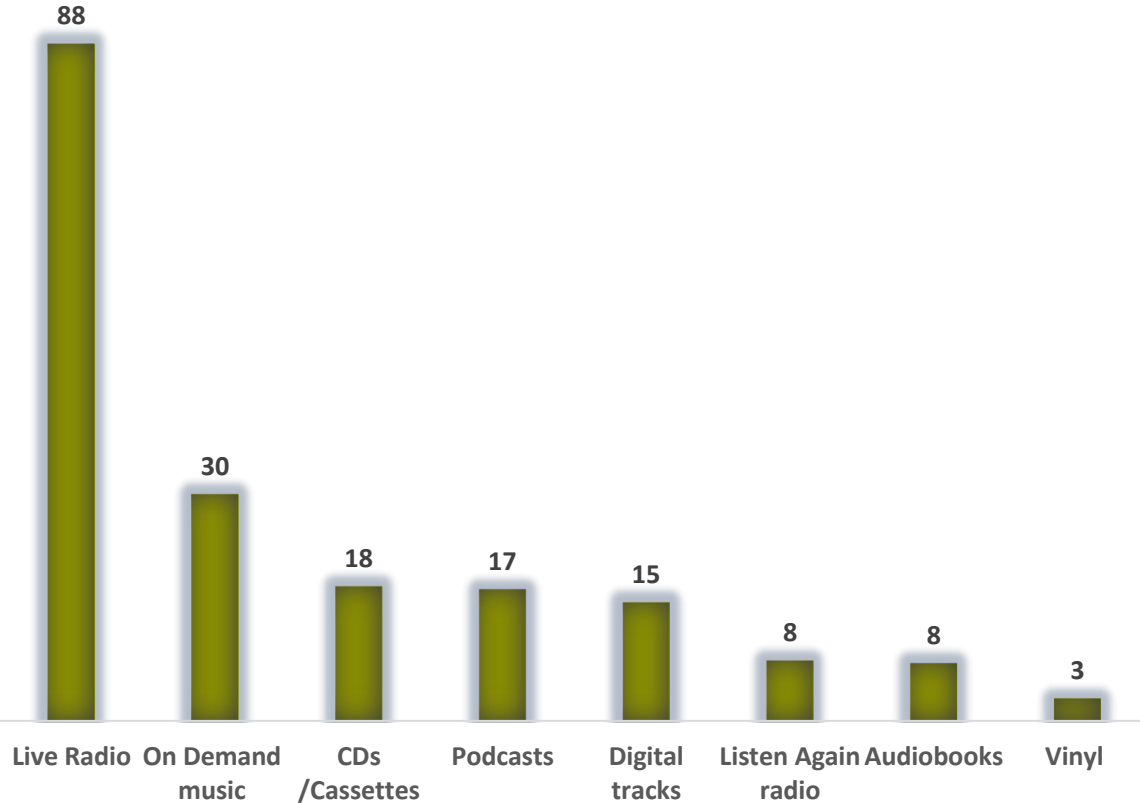
- Audio Overview
- Wave on Wave Trends
- Live Radio
- Listen Again
- Podcasting
- On Demand Music Services
- Devices
- Time Spent

For Publication Enquiries contact;

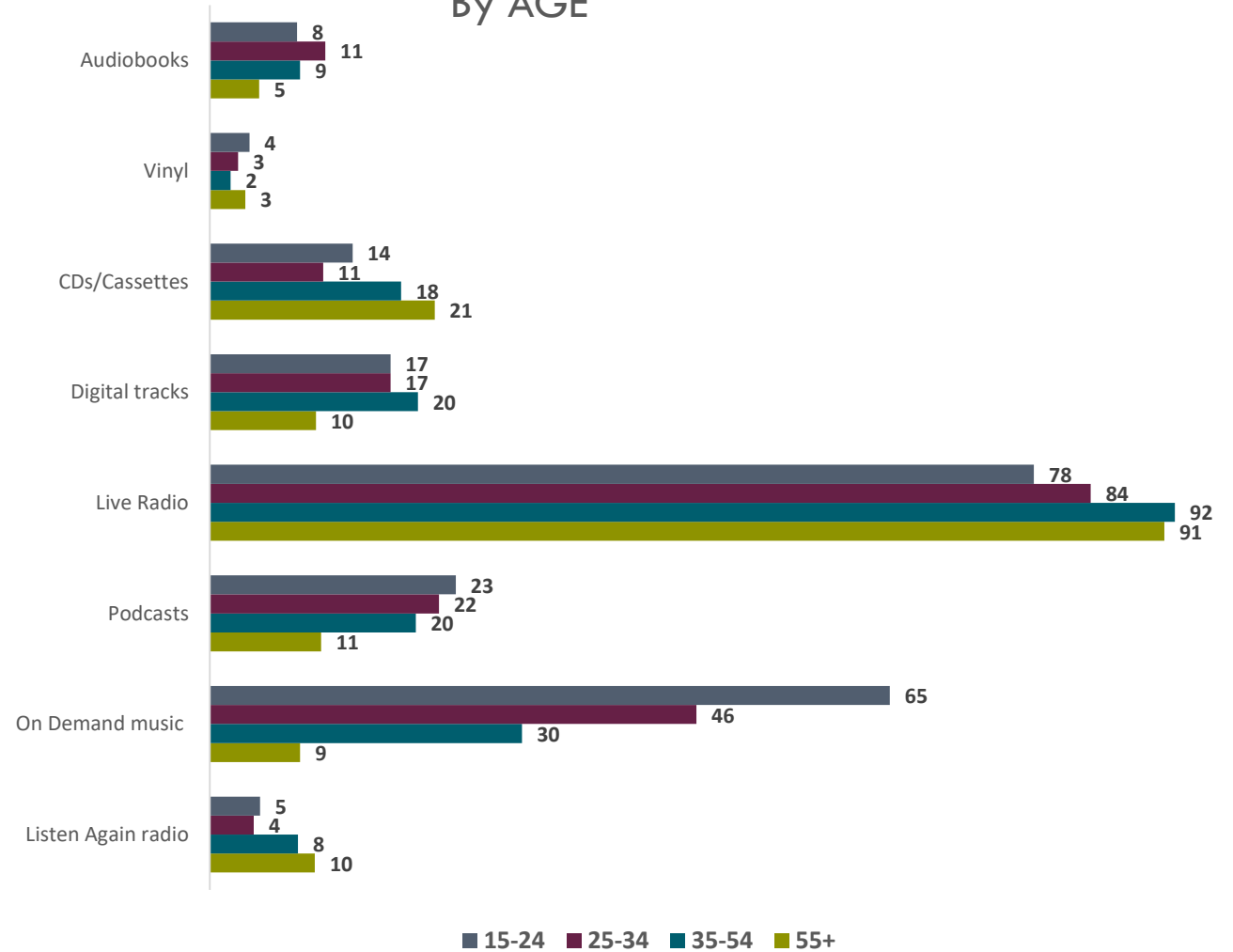
Lyndsay Ferrigan
RAJAR Communications Manager
Email: Lyndsay@rajar.co.uk
Telephone Number: 02073950636

WEEKLY REACH %
AUDIOTYPES

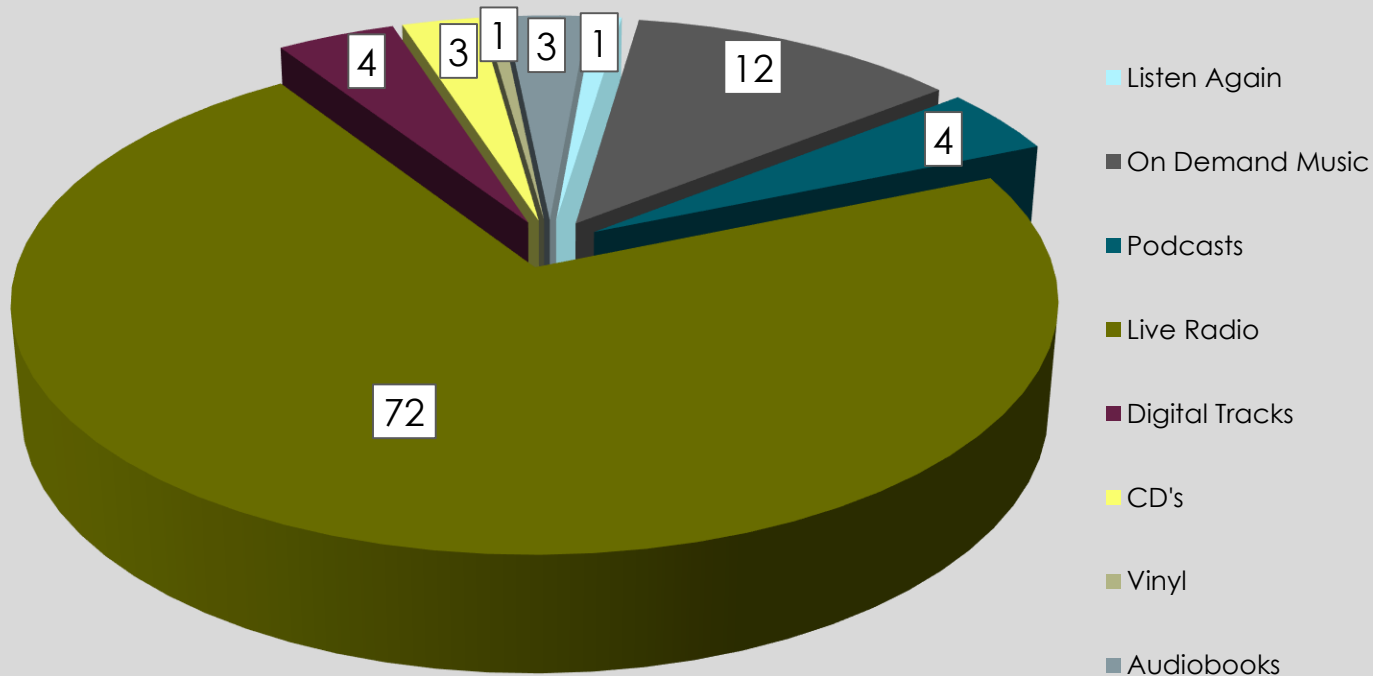
ALL ADULTS 15+



REACH %
By AGE

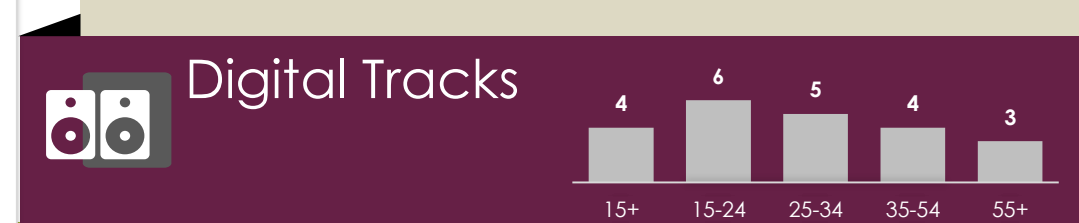
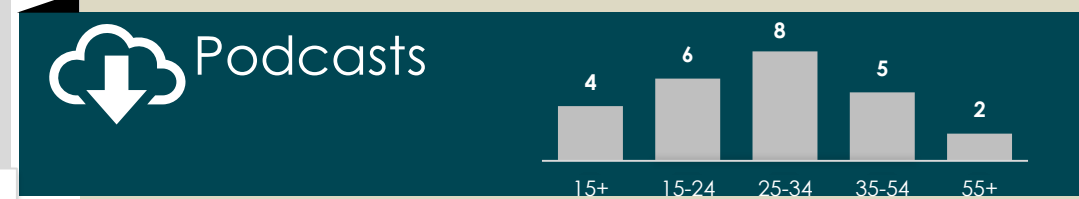
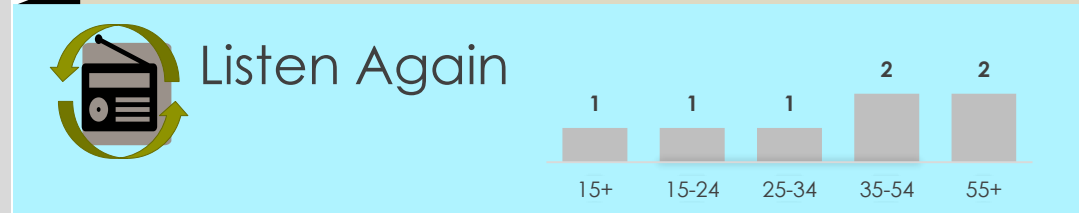
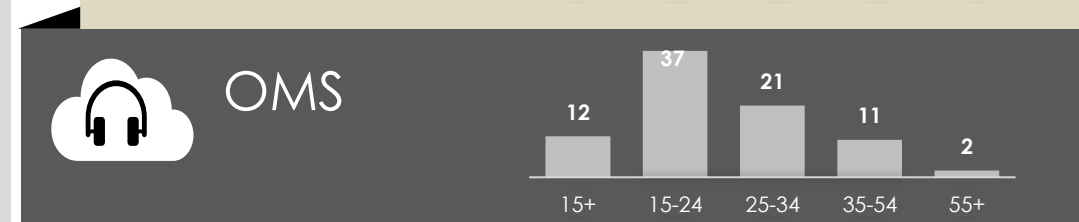
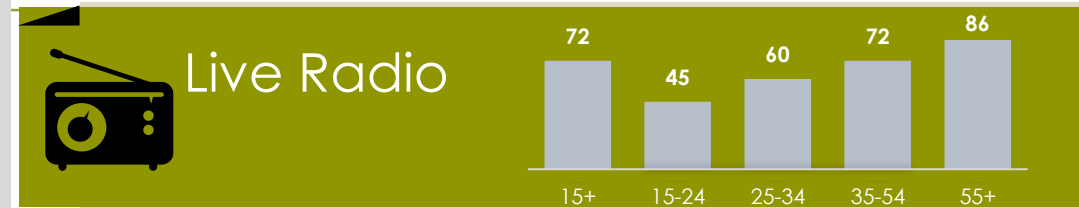


AUDIO OVERVIEW

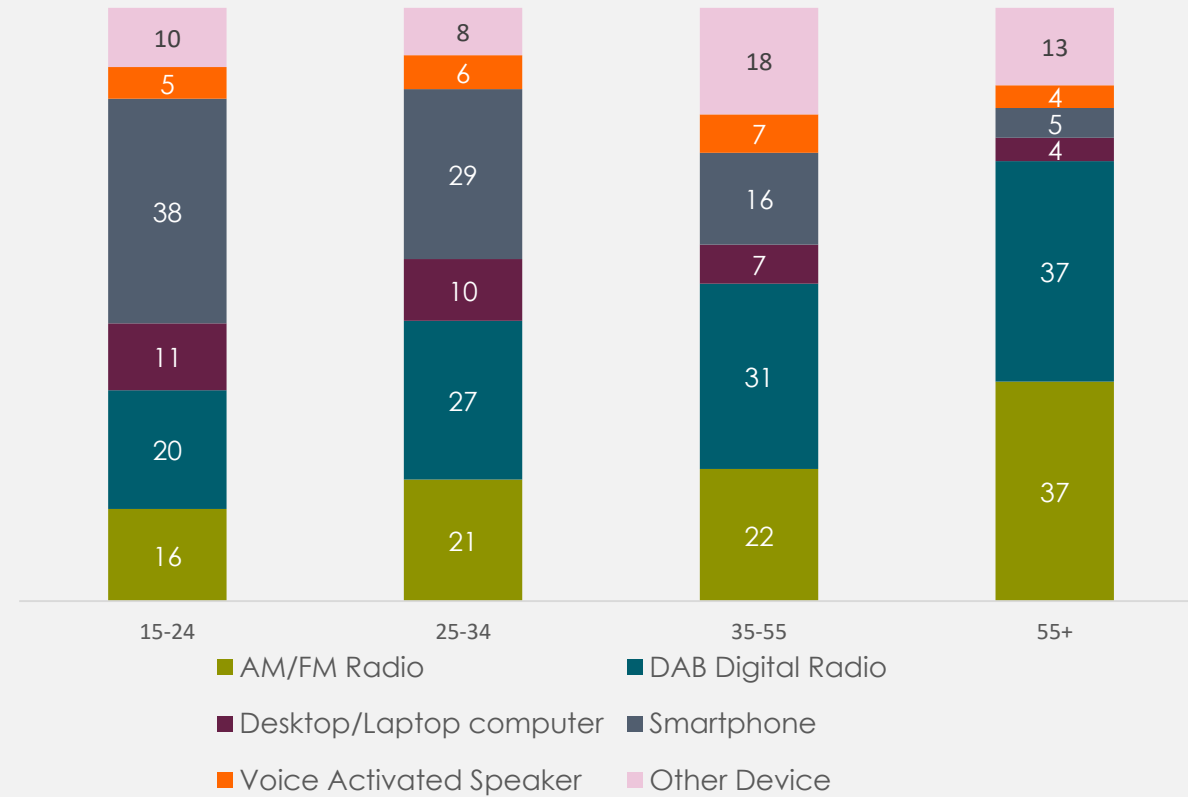
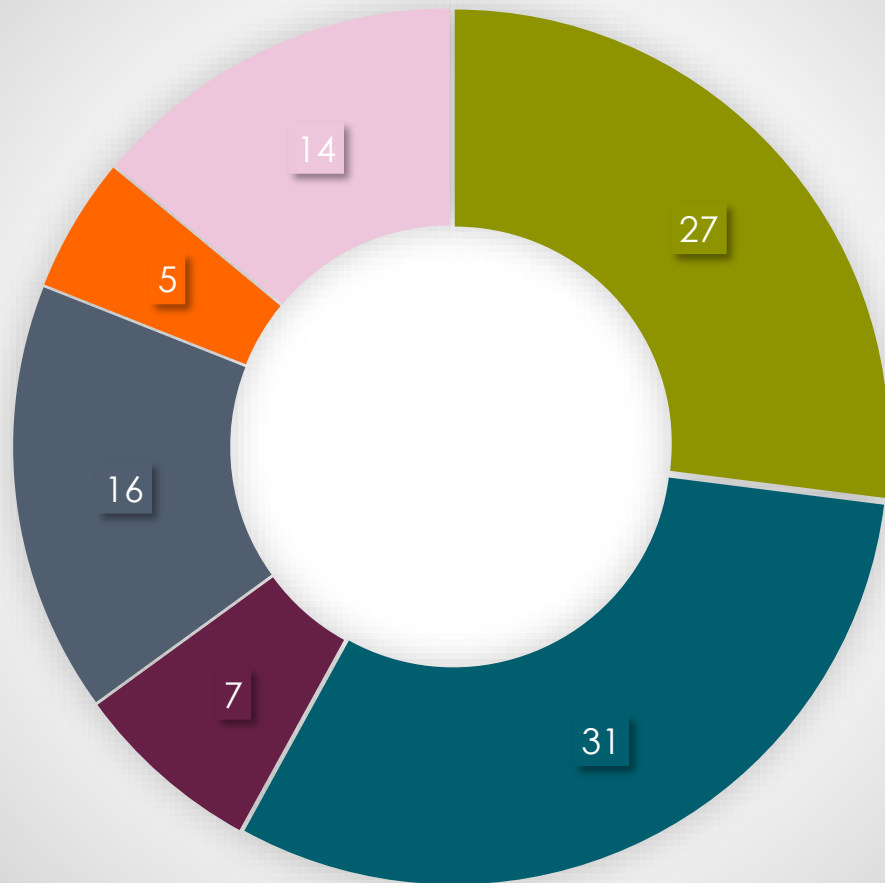


Audio (excluding visual) by Share % for All Adults 15+ 

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



AUDIO OVERVIEW

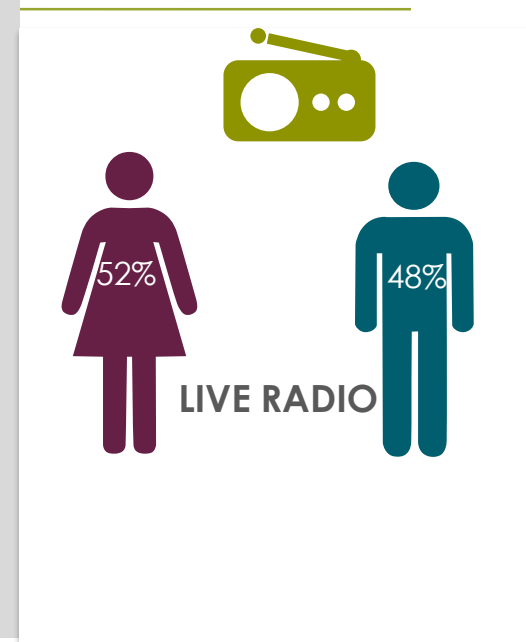
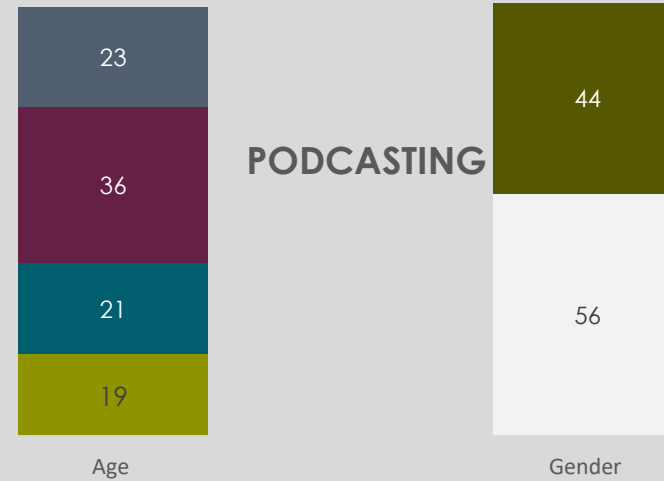
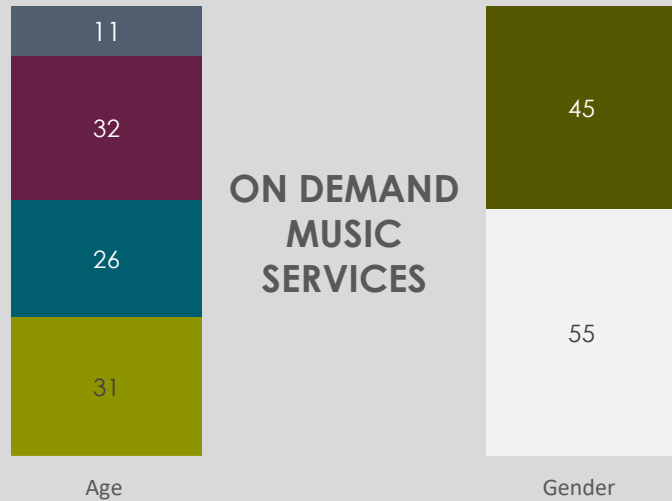


Audio (excluding visual) by Device Share % for Demographics (15-24, 25-34, 35-54 and 55+)

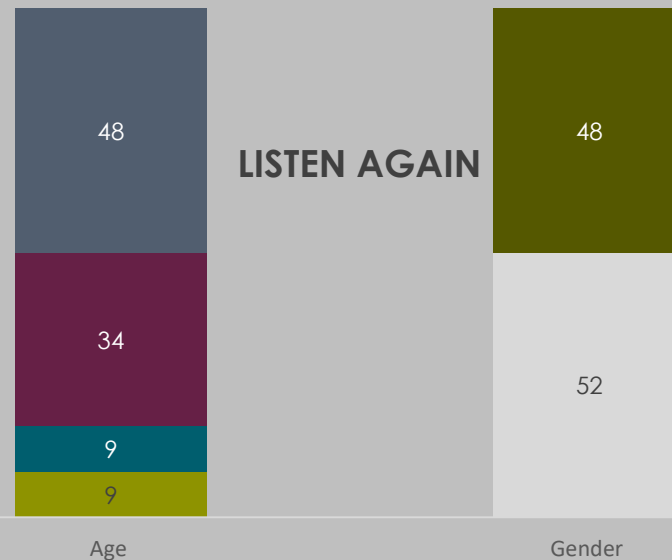
Audio (excluding visual) by Device Share % for All Adults 15+

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

AUDIO OVERVIEW



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

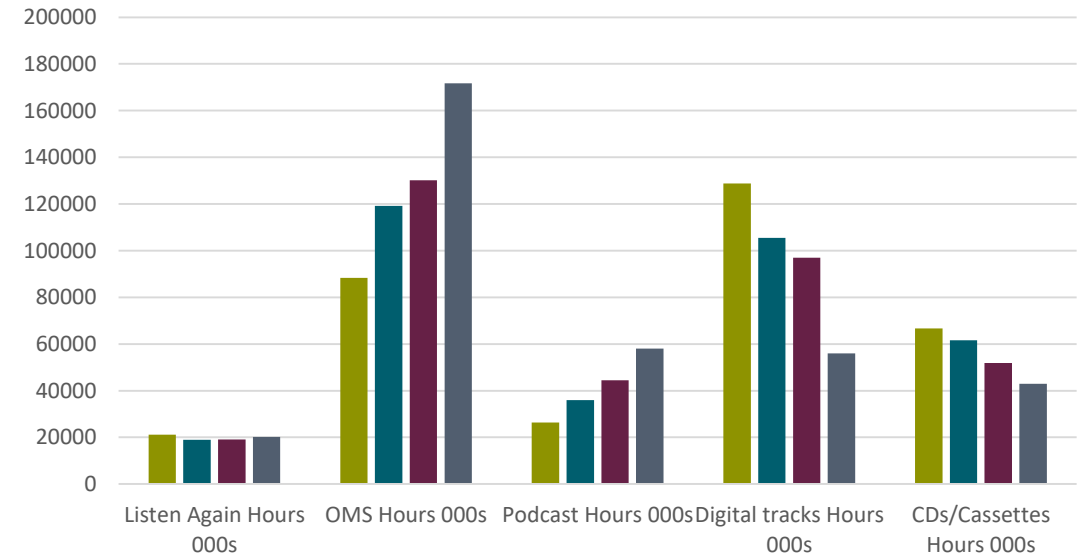
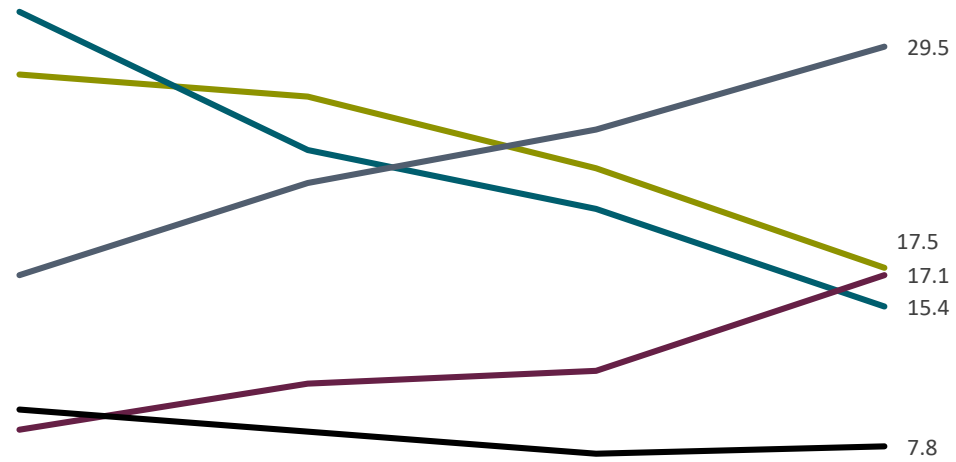


Listen Again or Catch up radio is favoured in the older demographics.

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 radio.

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



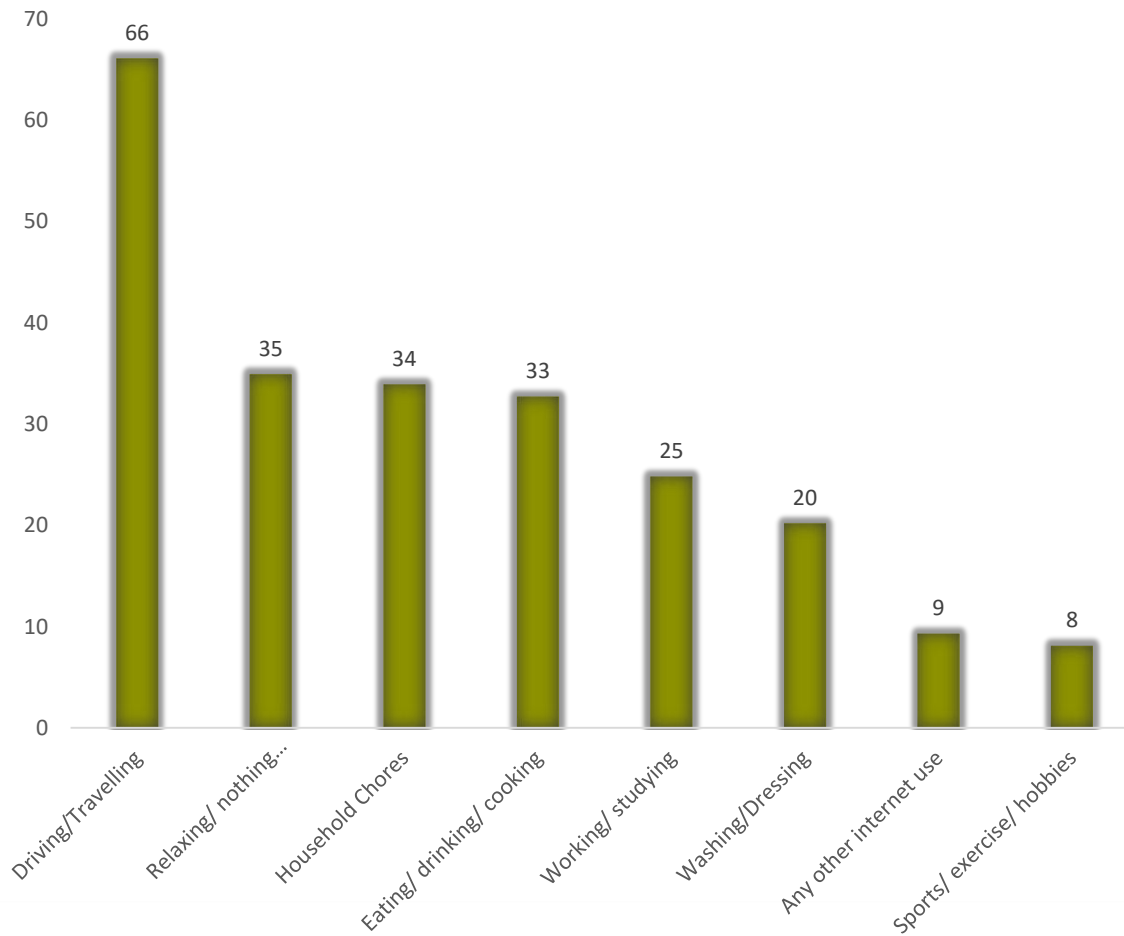
■ MIDAS Winter 2016
 ■ MIDAS Winter 2017
 ■ MIDAS Winter 2018
 ■ MIDAS Winter 2019

2016 Winter MIDAS	2017 Winter MIDAS	2018 Winter MIDAS	2019 Winter MIDAS
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— CDs
 — Digital Tracks
 — Podcasts
 — On Demand Music
 — Catch Up Radio

LIVE RADIO by ACTIVITY

REACH% All Adults 15+



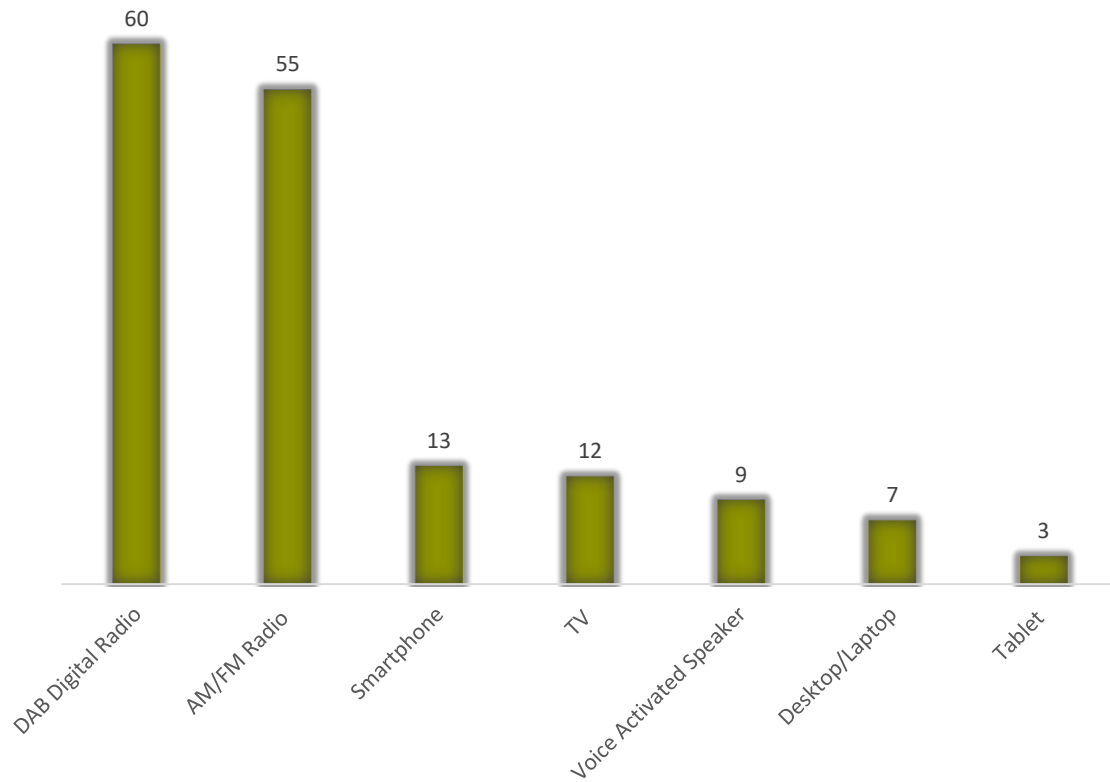
26%

of live radio hours
are listened to whilst
Driving/Travelling

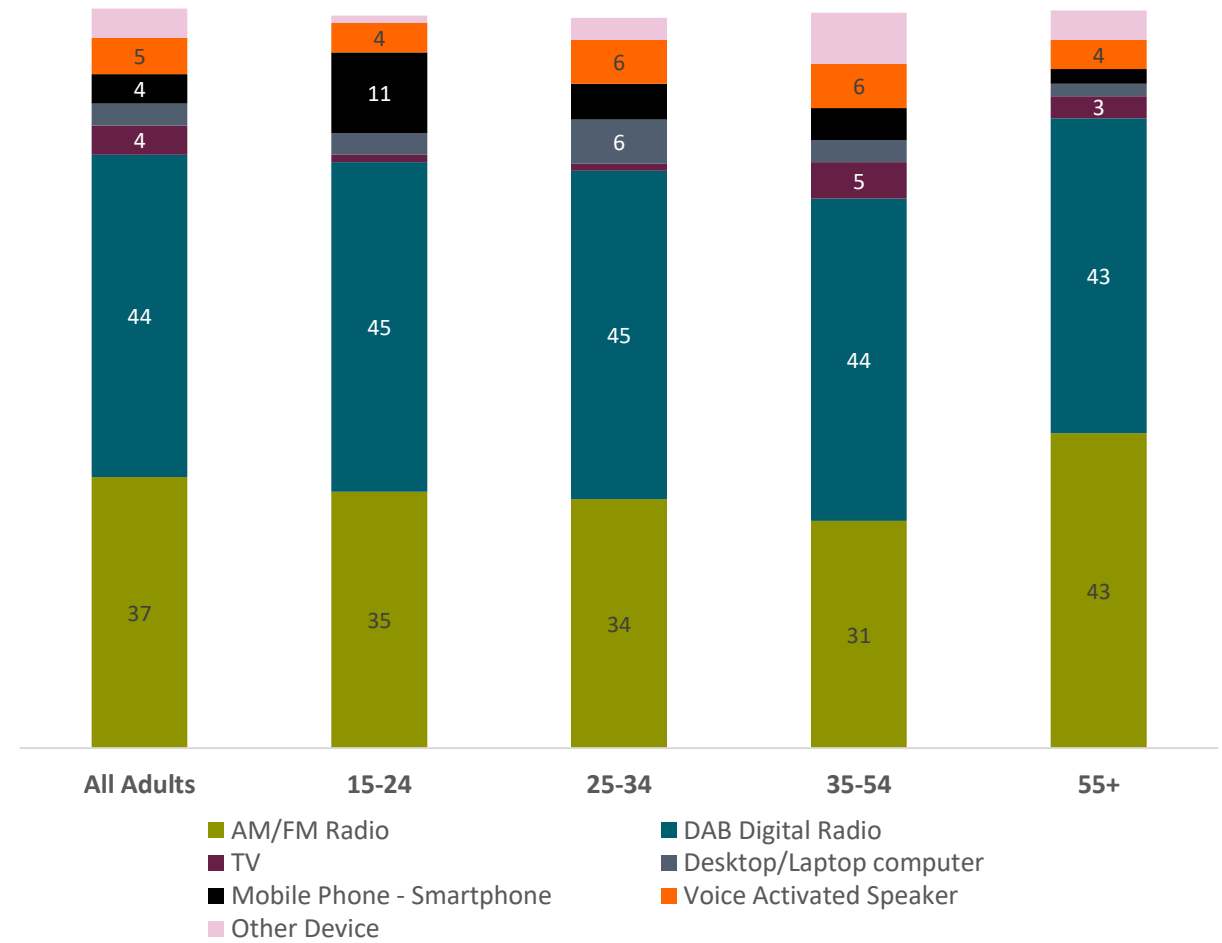
79%

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

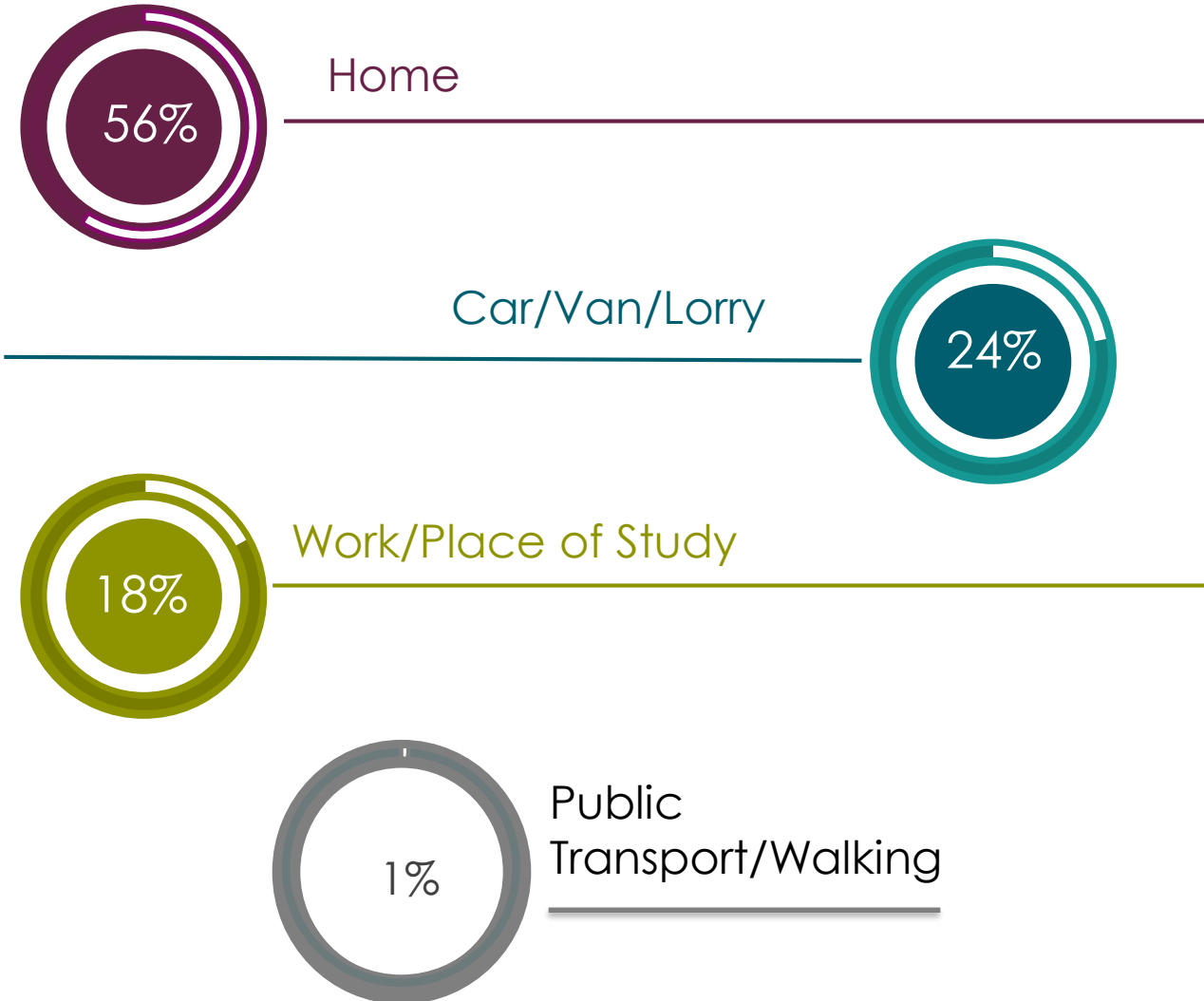
LIVE RADIO by DEVICE REACH %



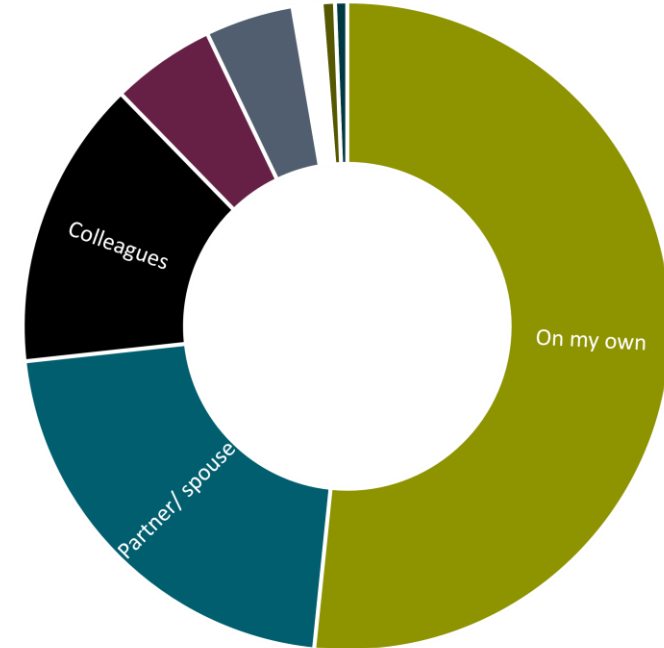
SHARE%



LIVE RADIO via LOCATION and WHO WITH



*1% elsewhere

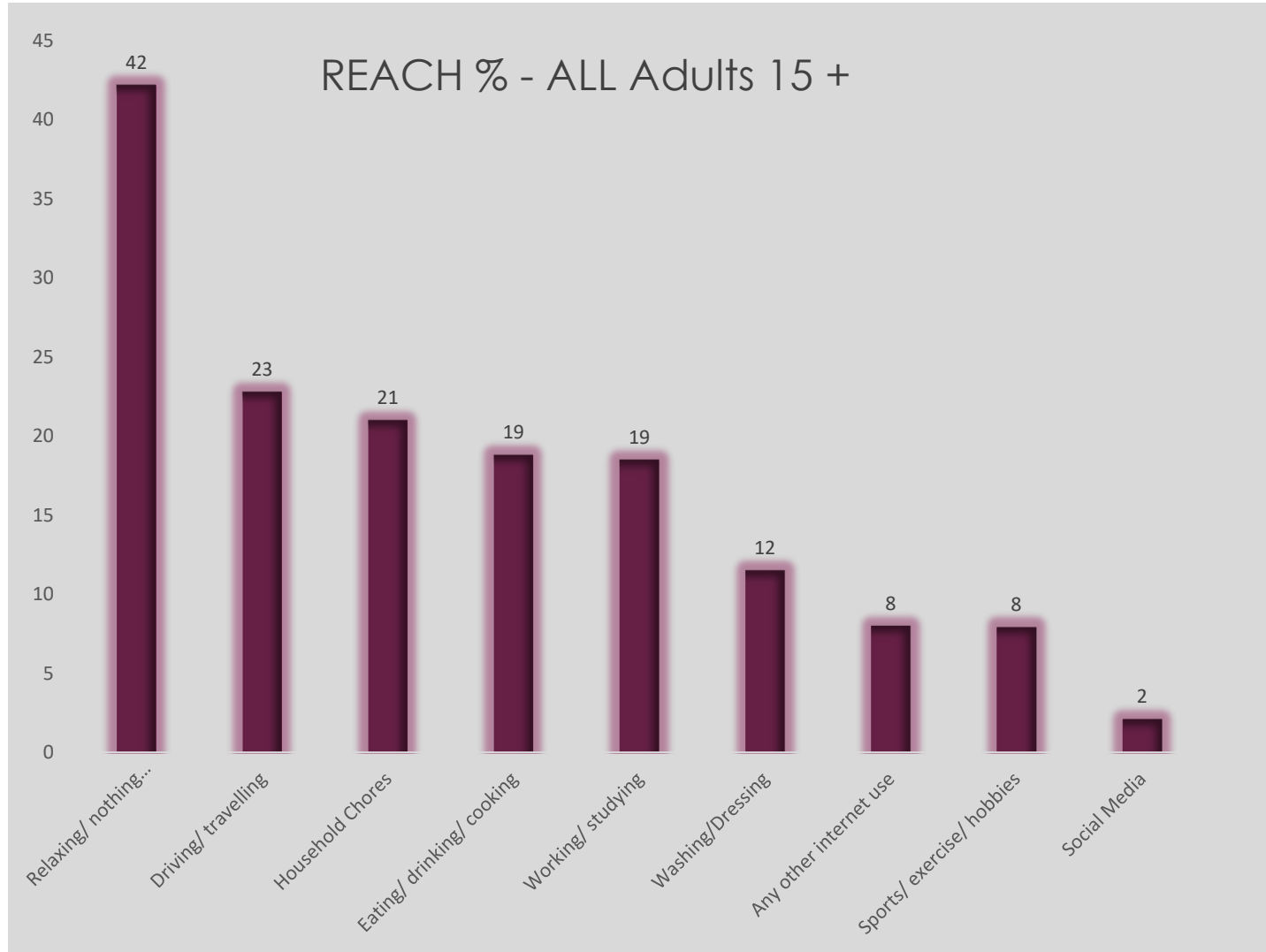


Half (50%) of live radio listening is done alone, this is consistent through the age demographics. 21% with a partner or spouse and 14% with work Colleagues.

In 'home' dominates live radio listening hours with a share of 56%, in vehicle 24%, at work or place of study 18%

LISTEN AGAIN by ACTIVITY

Listen Again or Catch Up Radio (a radio programme that was once live and listened to a later time) tends to be mainly speech based content. 42% of the Listen Again hours are done whilst relaxing.



LISTEN AGAIN by DEVICE

Smartphones are the most frequently used device to go back and listen to a radio programme at a later date. (40%) of catch up radio listening hours were done this way, with Tablet 28% and PC/Laptop 24%. 3% Digital Music Player, Voice Activated Speaker 2%

4.8 Million

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



40%

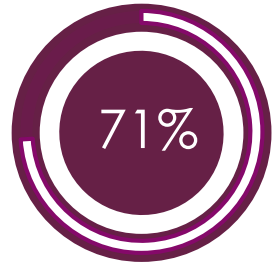


28%



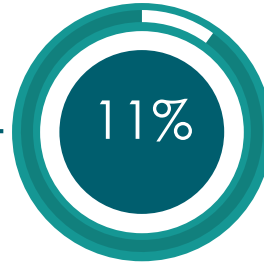
24%

LISTEN AGAIN via LOCATION (Share) and WHO WITH

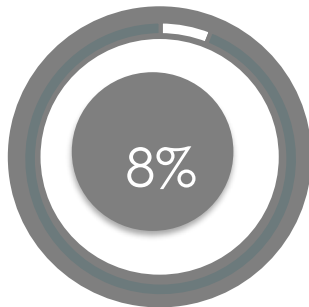


Home

Car/Van/Lorry

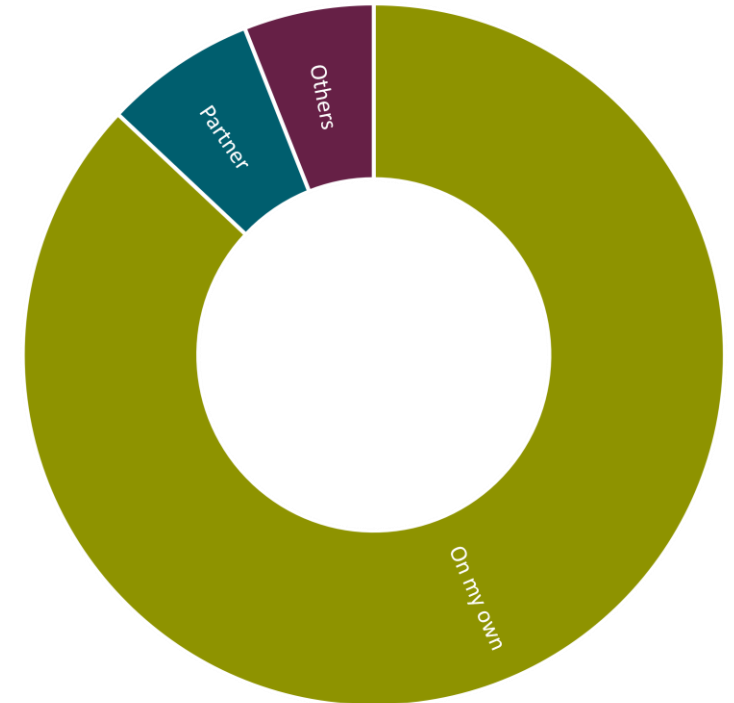


Work/Place of Study



Public Transport/Walking

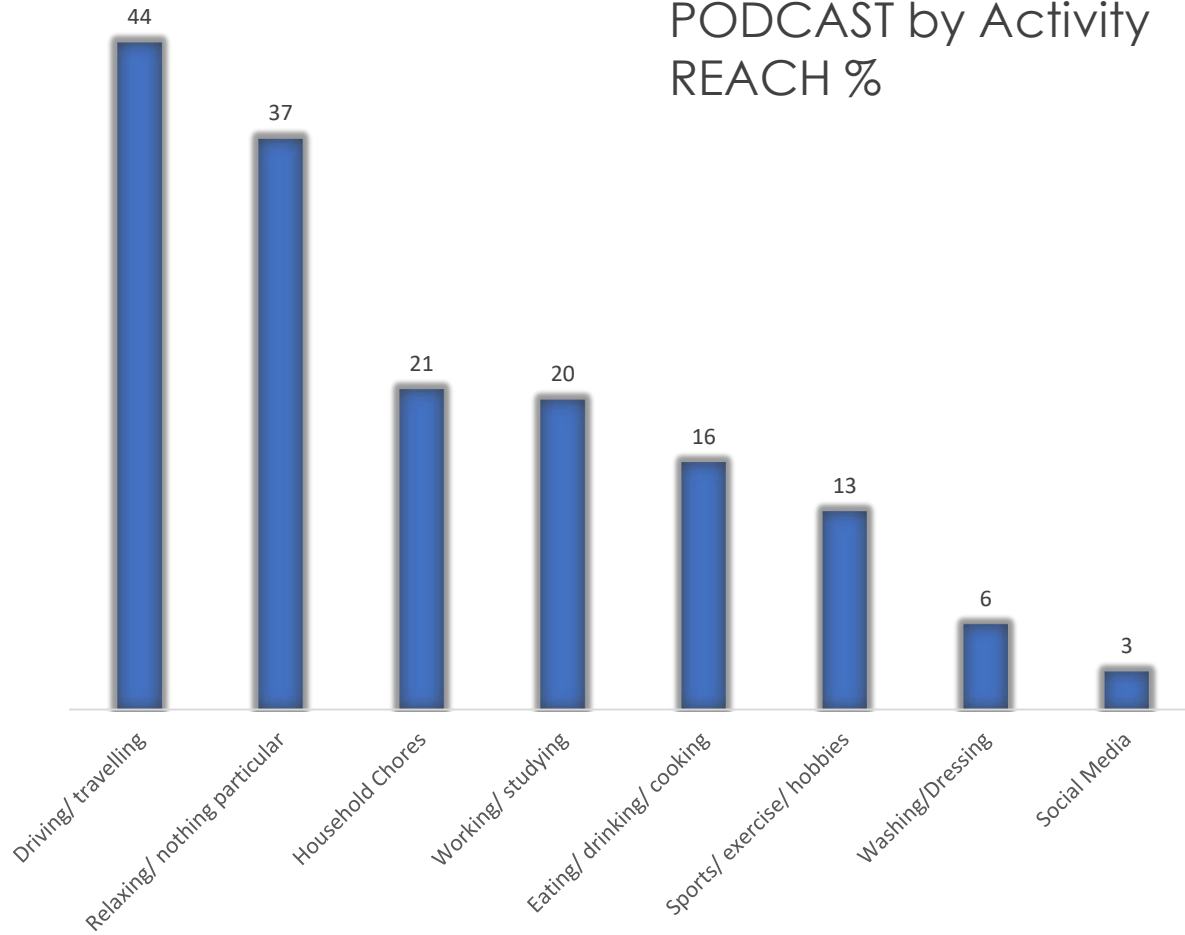
*3% Elsewhere



91% of Catch Up or Listen Again radio hours are spent listening on a person's own, only 5% with a partner or spouse and 4% with others.

71% of Catch Up radio listening is done at Home.

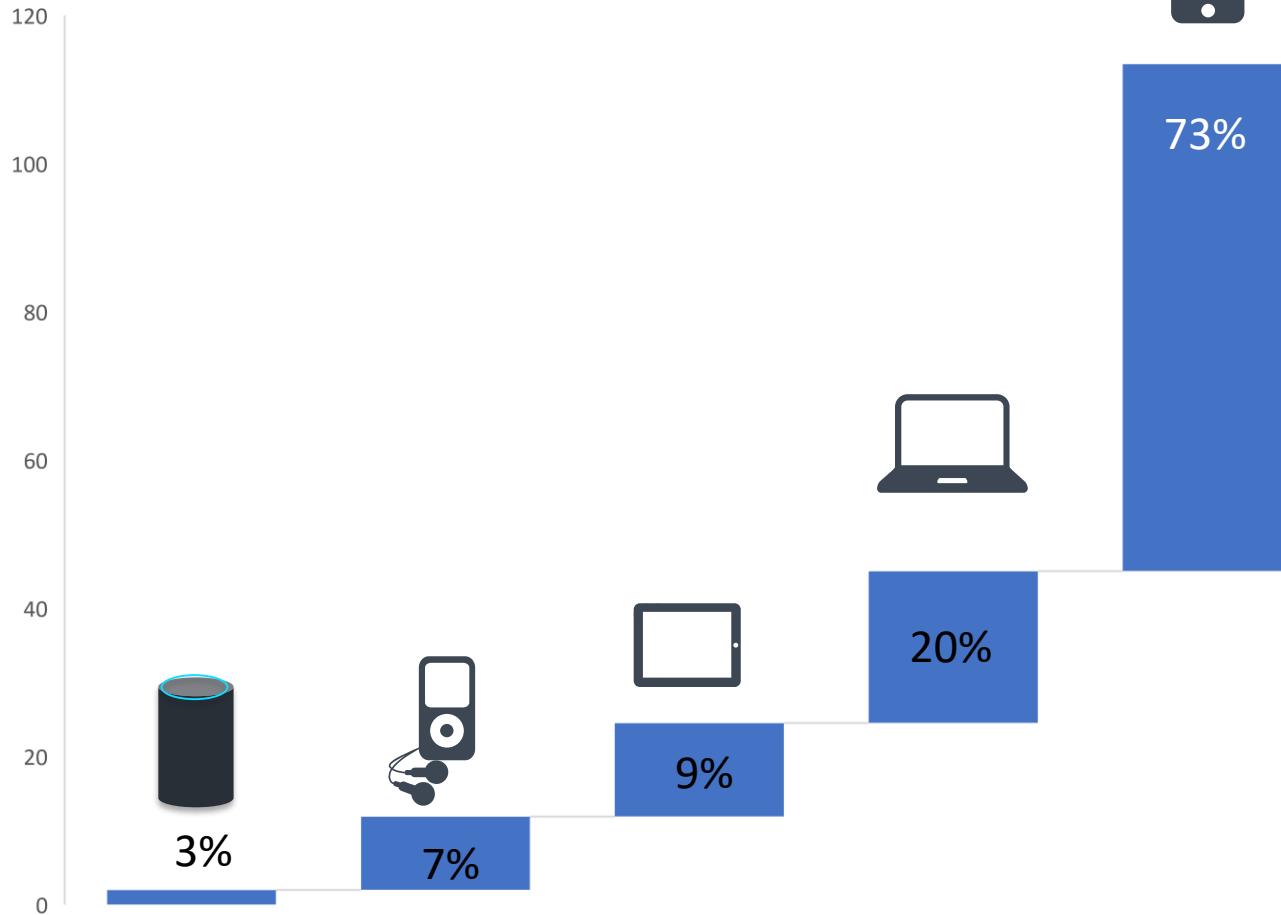
PODCAST by Activity REACH %



31%
of Podcasting
hours listening to
whilst
working/studying

66% of Podcast listeners listen to the whole episode and 65% listen to mostly all of the episodes they download.

PODCASTING VIA DEVICE
REACH %



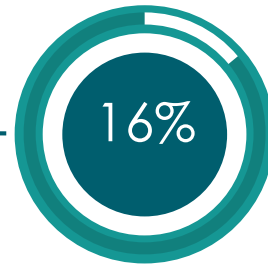
Smartphones are the preferred device for listening to Podcasts with a share of 71% of the listening hours.

PODCASTING via LOCATION and WHO WITH
SHARE%

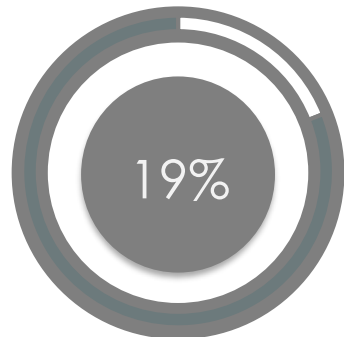


Home

Car/Van/Lorry

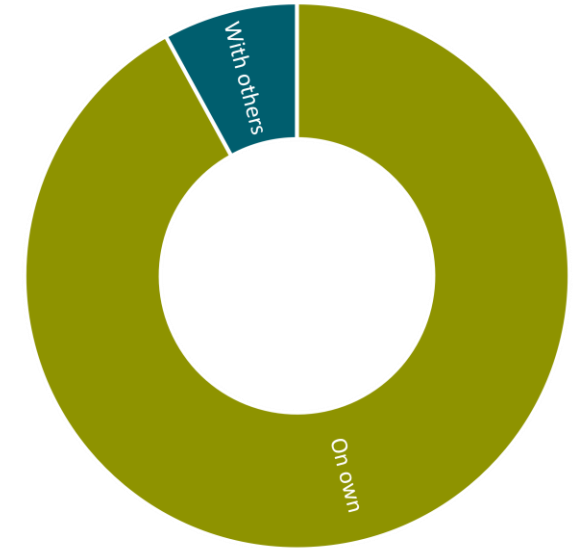


Work/Place of Study



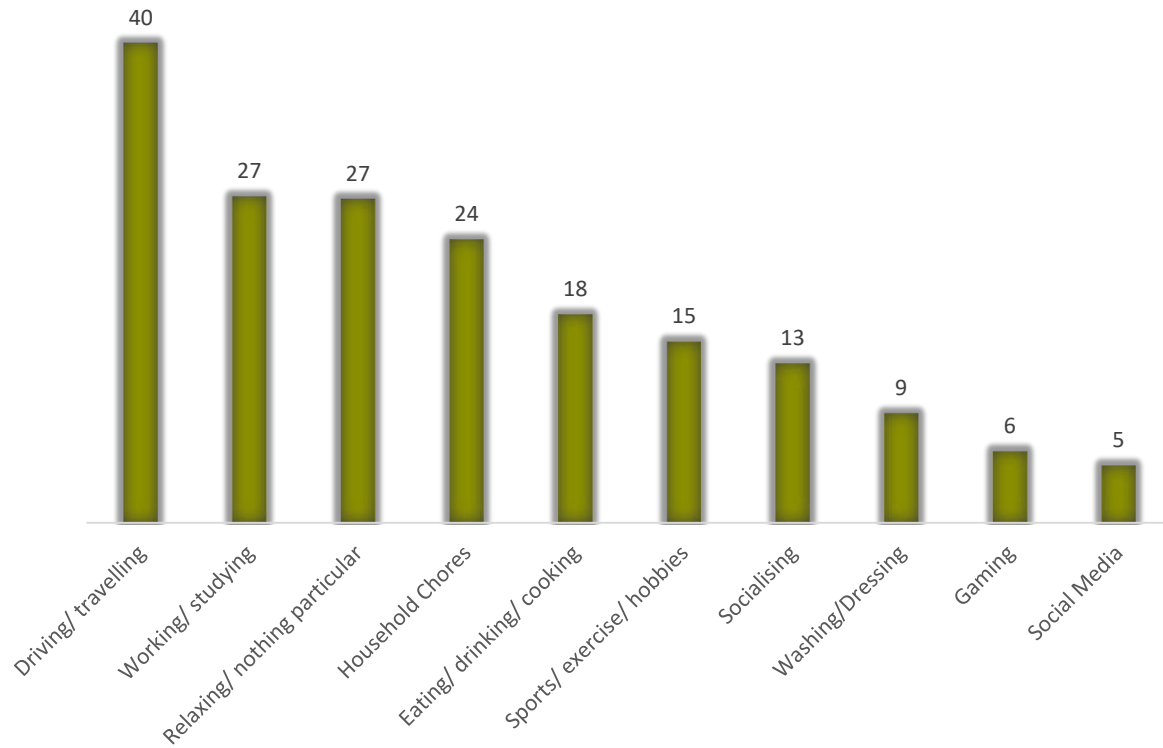
Public Transport/Walking

6% Elsewhere



Podcasting is almost always a solo activity, with a share of 90%

On Demand Music by Activity REACH %



34%
of On Demand
Music hours
listening to whilst
working/studying

21m
use a Premium
On Demand
Music Service

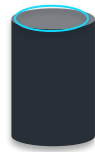
*service with no ads

On Demand Music by DEVICE

REACH%



76%

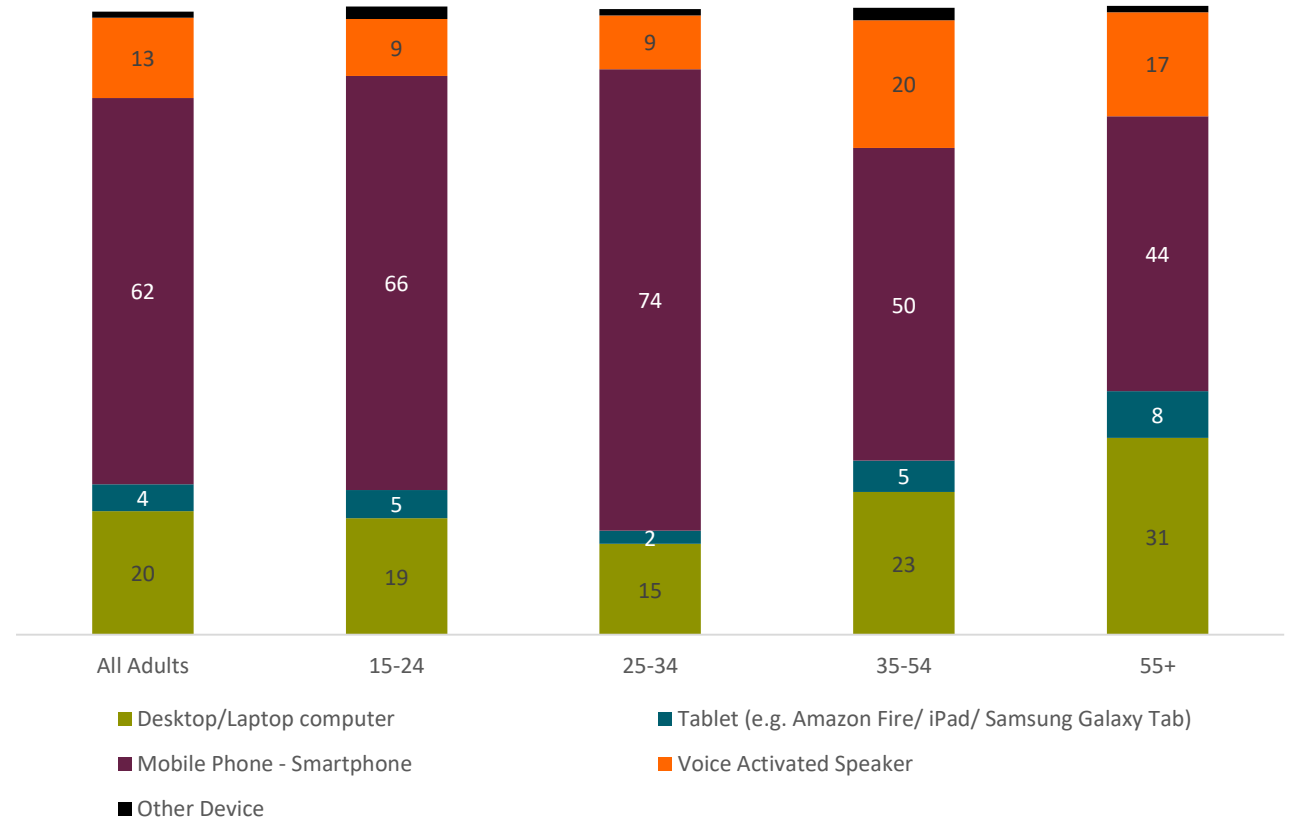


22%



23%

SHARE%

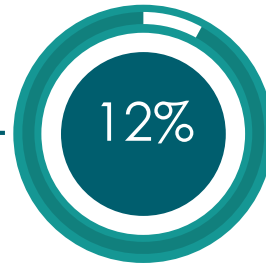


On Demand Music by LOCATION (Share) and WHO WITH

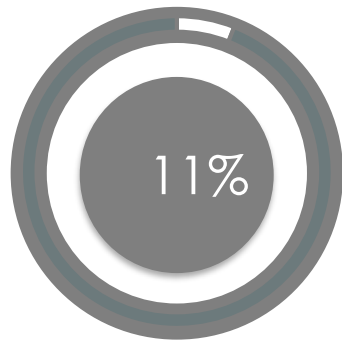


Home

Car/Van/Lorry

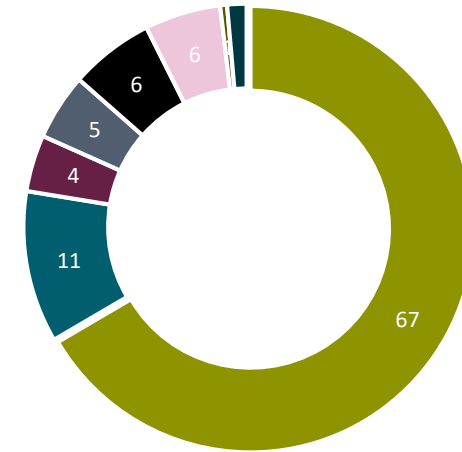


Work/Place of Study



Public Transport/Walking

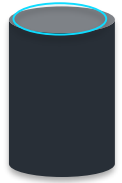
7% Elsewhere



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

Listening to music services on demand is more sociable than other audio types such as Podcasting or Catch up Radio with 67% share of alone, 11% Partner/Spouse and 6% with Colleagues

VOICE
ACTIVATED
SPEAKERS



SHARE%

■ On Demand music ■ Podcasts ■ Live Radio ■ Audiobooks ■ Other Audio Type



67% 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 30%, Podcasting 1% and Audiobooks 1%.

SMARTPHONE

SHARE% AUDIO EXC VISUAL



■ Listen Again
 ■ On Demand music
 ■ Podcasts
 ■ Live Radio
 ■ Digital tracks
 ■ Audiobooks

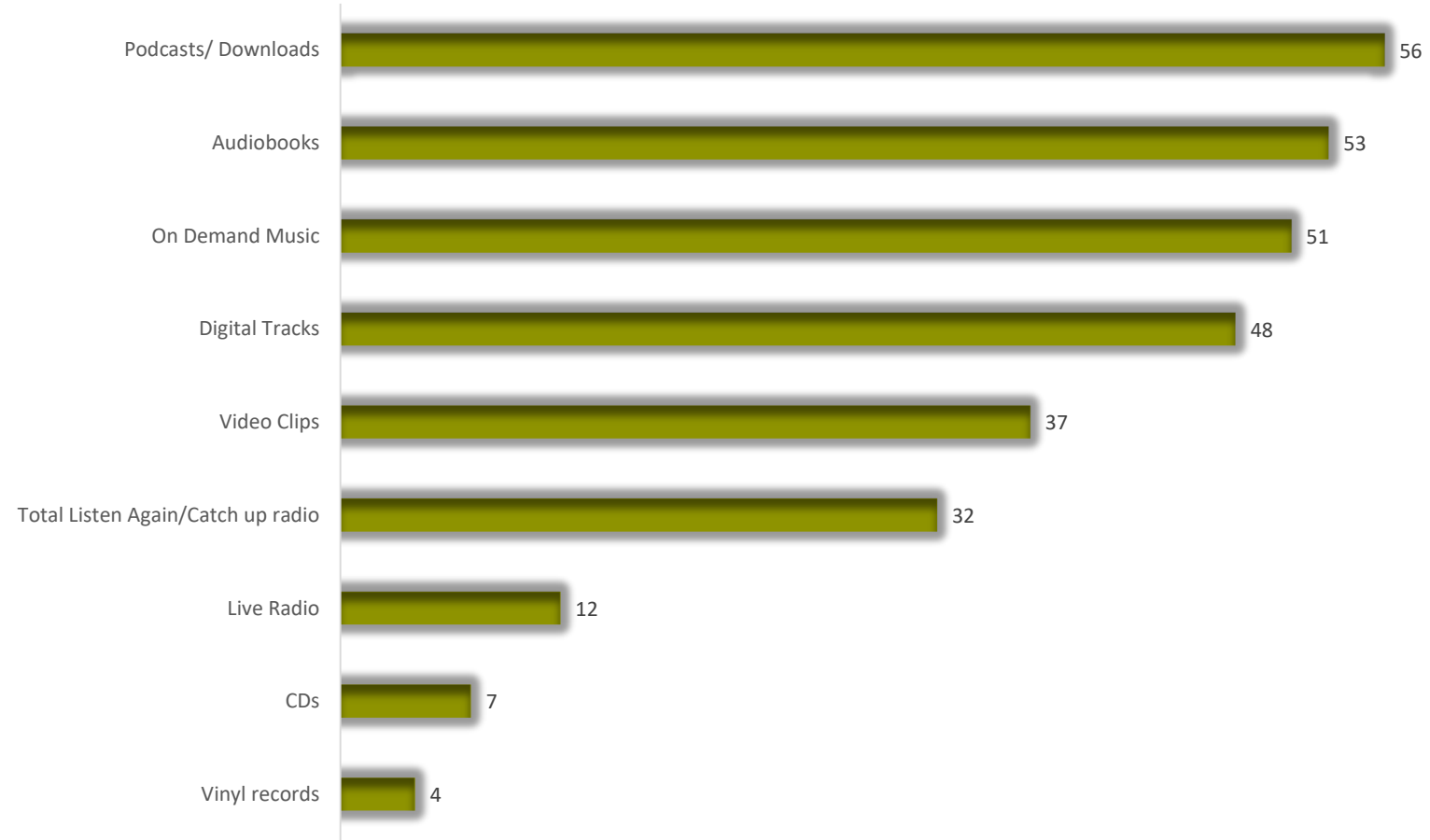


On Demand Music dominates the Smartphone and has the highest share with 47% of the listening, followed by Podcasts 18%, Live radio 16%, Digital Tracks (owned music) 9%, Audiobooks 7% and Catch Up Radio 4%

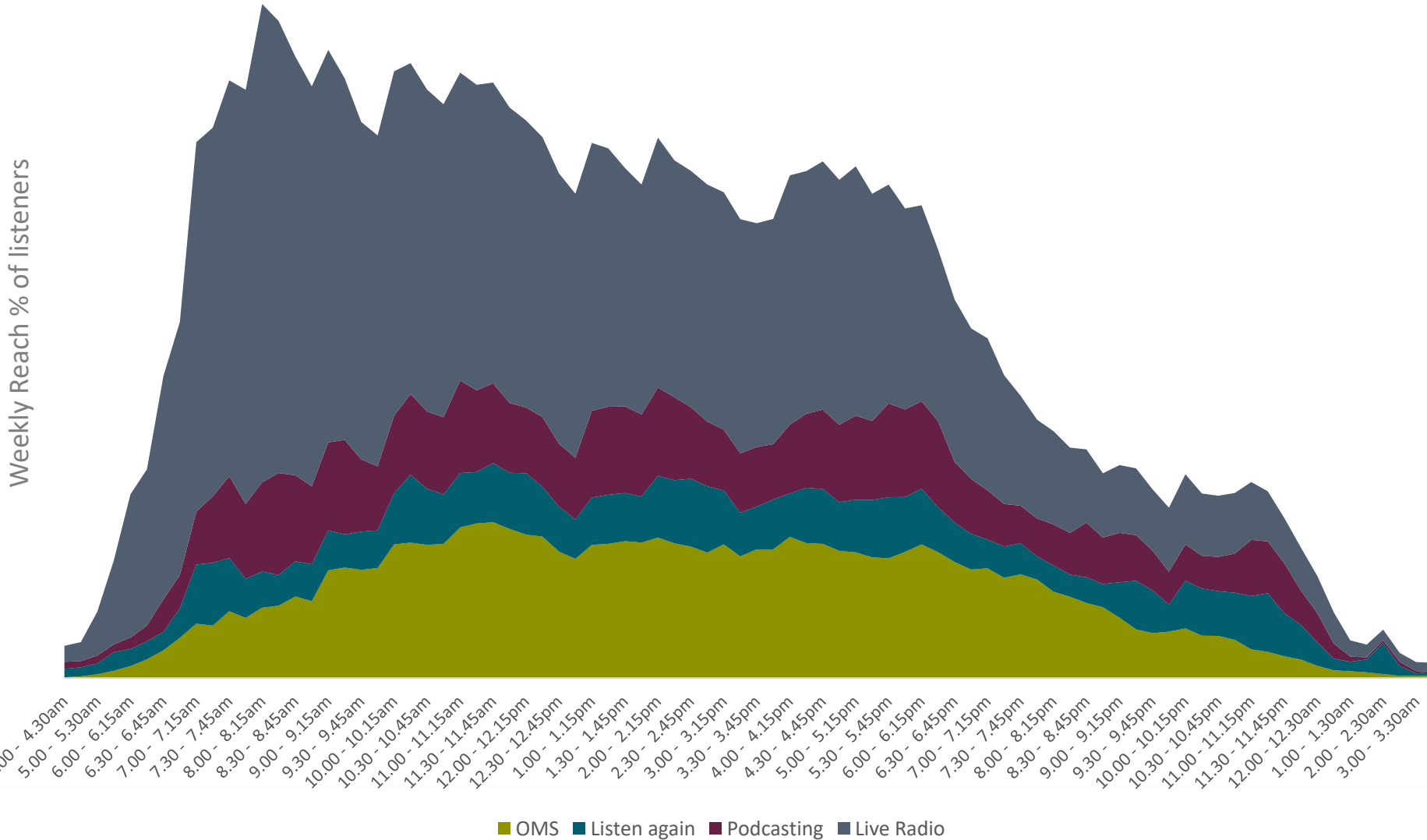
HEADPHONES



AUDIOTYPE By HEADPHONES REACH%



MONDAY – FRIDAY MIDWEEK AVERAGE



Live Radio listening peaks at :8.00am-8.15am

Podcasting 8:15-8.30am

Listen Again 2:30-2.45pm

On Demand Music 11:30-11:45pm

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/Subscription 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

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

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

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

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

LOCATION OF LISTENING

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