

INTRODUCTION

MIDAS Spring 2015

In today's connected environment 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, in addition to showing 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 (**Share AM/FM 52%, DAB with 33%**). Devices connected to the internet have a much smaller share of listening hours (**Desktop/Laptop 3%, Smartphone 2% and Tablets 0.4%**)

APPS



Radio Apps are popular amongst radio listeners. **19 million or 35% of the UK population** have downloaded a Radio App. **4.1 million (49%)** of 15-24 year olds and **4.3 million (49%)** of 25-34 year olds claim to have downloaded a Radio App. Almost half of all users who download a radio app use it on a weekly basis.

PODCASTING

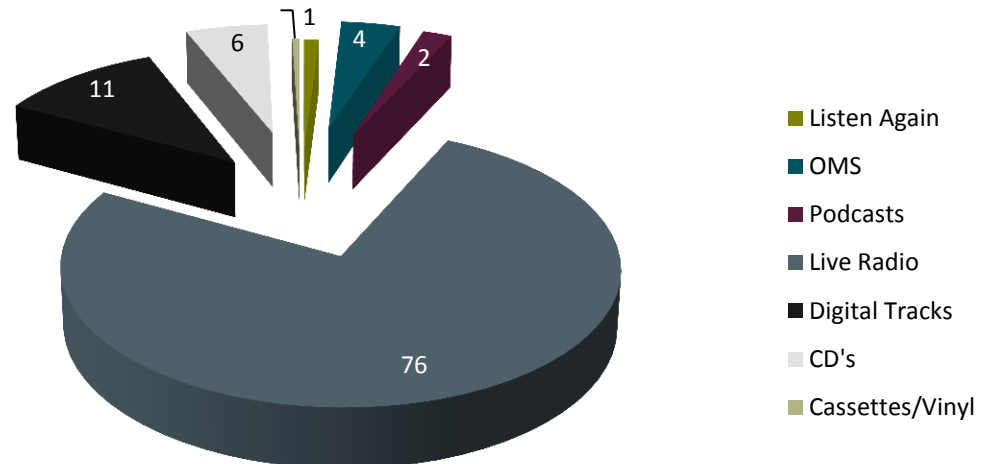
The Smartphone is the most popular way to listen to a Podcast for adults with a share of **36%** (Adults 15+) Young adults (15-24 year olds) predominantly use a Digital Music players, with a share of **34%**. Well over half of all Podcasts downloaded are listened to (**59%**).

LISTEN AGAIN

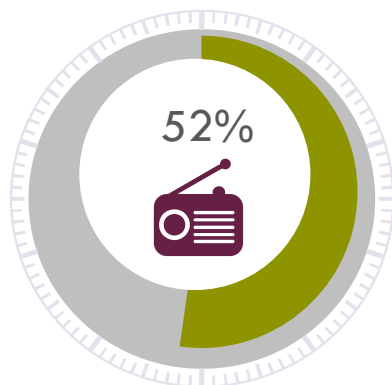


3.5 million adults use the 'listen again' function. **85%** of these adults prefer to listen alone rather than with friends or colleagues. Desktops/Laptops are the device of choice with **44% share** of all 'listen again' listening hours.

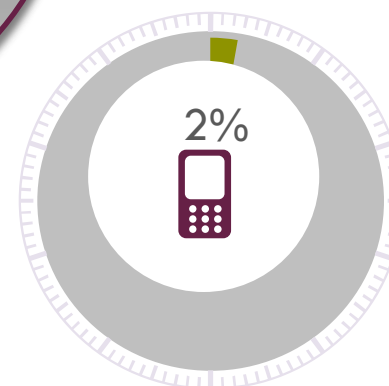
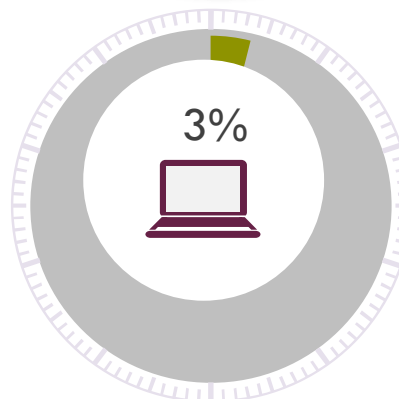
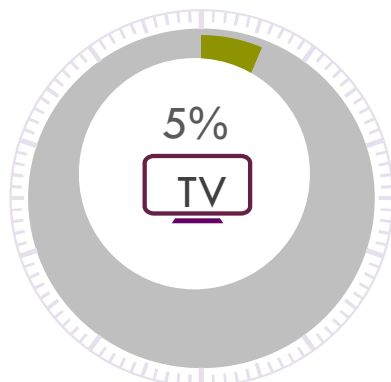
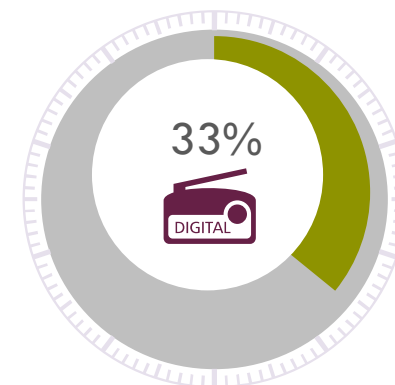
AUDIO SHARE OF EAR % (excluding visual)



LIVE RADIO Listening by Device (Share %)



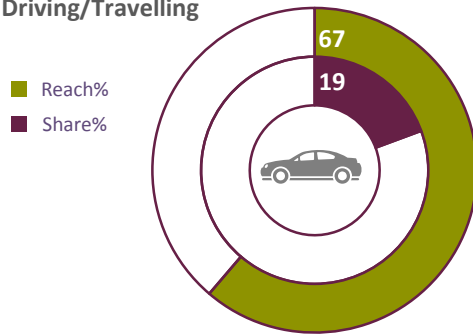
AM/FM and DAB radios see the highest 'share' of live radio listening hours for Adults 15+ with 52% for AM/FM Radio and 33% for DAB Radio. Listening via any TV 5%, laptop/desktop 3% and Smartphone 2%



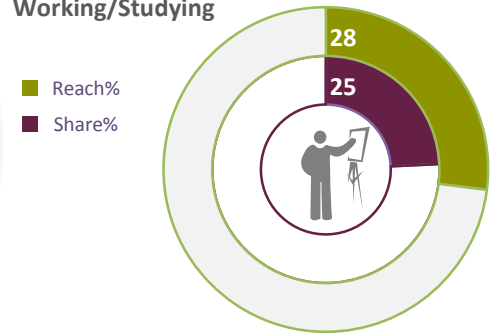
LIVE RADIO Listening by Activities (Reach and Share Adults 15+)

Amongst adults 15+ Working/Studying has the highest share of listening hours with **25%** followed by Driving/Travelling **19%**, Relaxing or Doing nothing in particular **14%** and household chores **12%** also Cooking/Eating/Drinking has an **9%** share of the live radio listening hours.

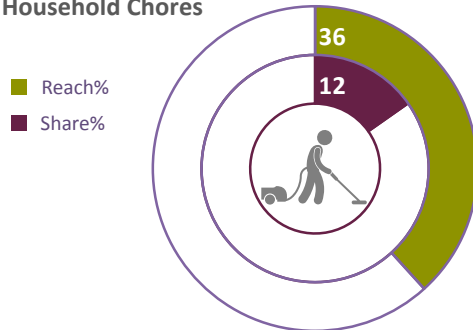
Driving/Travelling



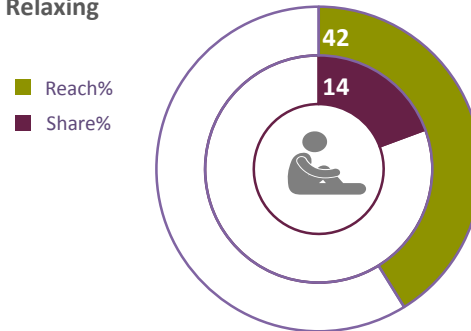
Working/Studying



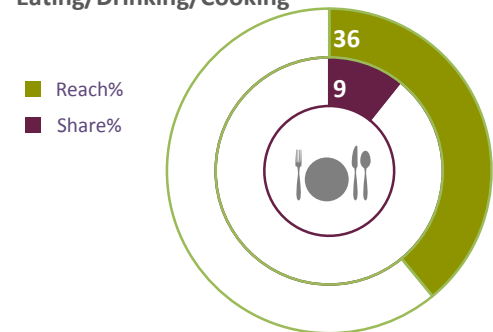
Household Chores



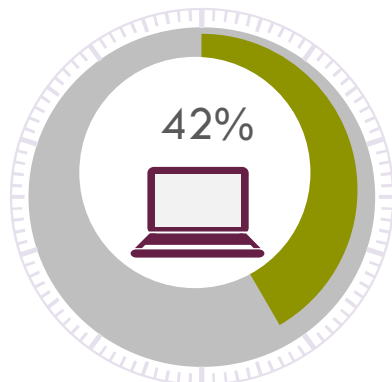
Relaxing



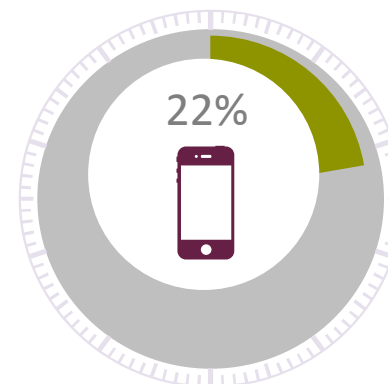
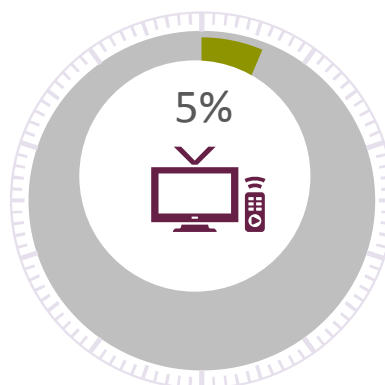
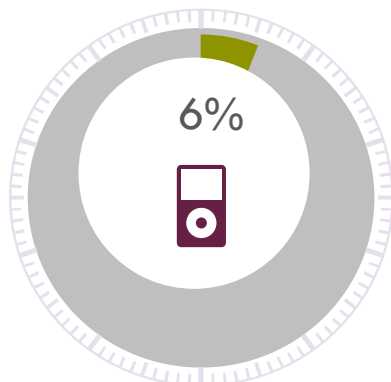
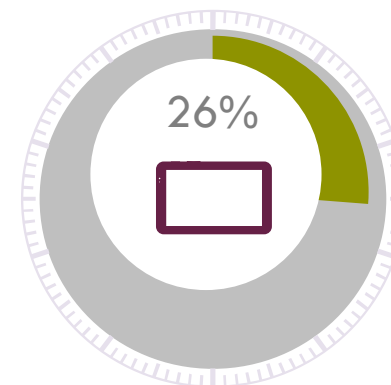
Eating/Drinking/Cooking



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



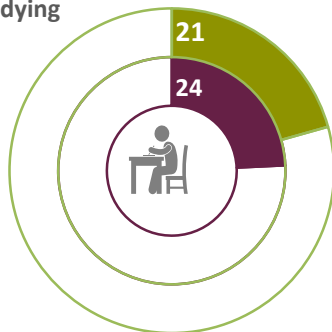
A Laptop or Desktop computer is the most popular device to listen to 'listen again' services with **42% Reach**. Tablets with **26%**, Smartphones **22%**, Digital Music Players **6%** and Any TV **5%**.



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

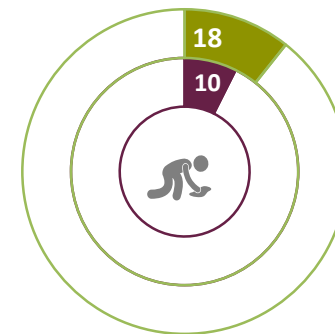
Working/Studying

■ Reach%
■ Share%



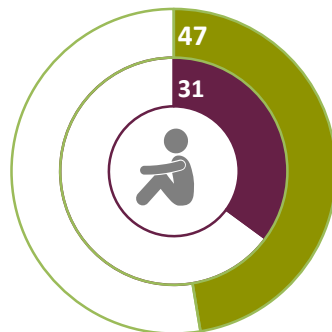
Household Chores

■ Reach%
■ Share%



Relaxing

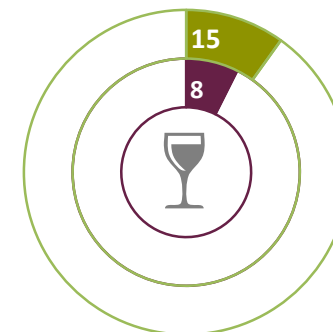
■ Reach%
■ Share%



Relaxing or doing nothing in particular and Working/Studying are the most popular activities whilst engaging in 'listen again' services with the highest reach and share of 'listen again' hours.

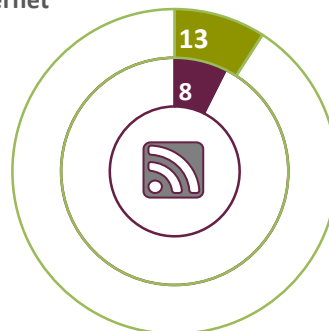
Eating/Drinking/Cooking

■ Reach%
■ Share%

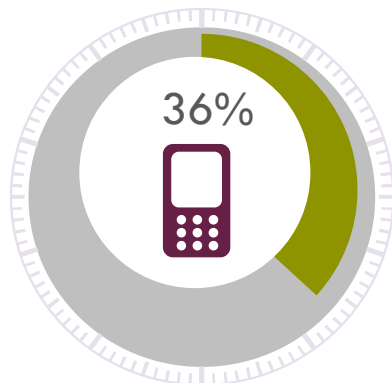


Using the Internet

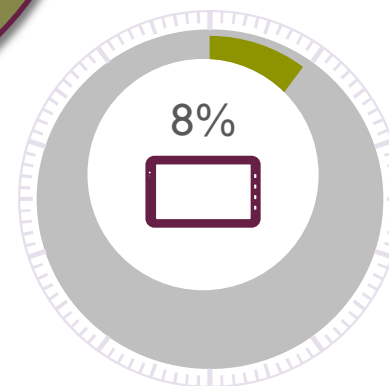
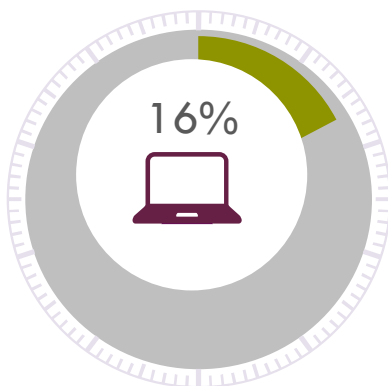
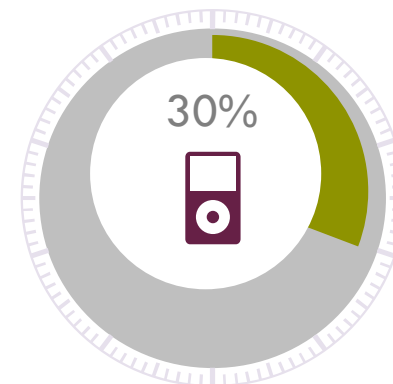
■ Reach%
■ Share%



PODCASTS by Device (Share %)



The majority of Podcasts are listened to alone (90%) so naturally we see connected mobile devices being used more frequently - Smartphones with a **36%** share of podcast listening hours, followed by Digital Music players with **30%**, any Computer **16%** and Tablets **8%**



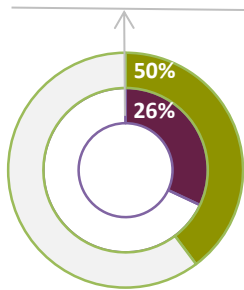
PODCASTS by Activity (Reach and Share %)



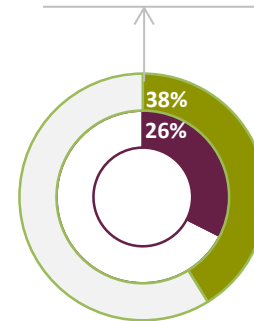
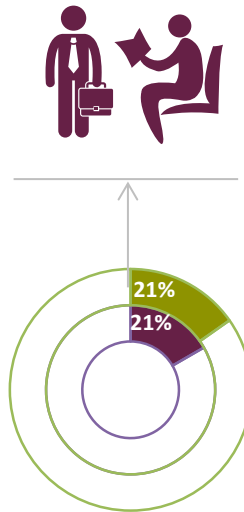
Working or Studying whilst listening to a Podcast has **21%** reach and **21%** share of listening hours.



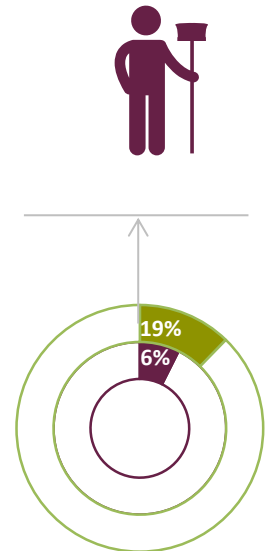
Household chores are also significant activities to undertake whilst listening to a Podcast. Chores represent an **6%** share of Podcast listening hours and has **19%** reach.



Relaxing or Doing nothing in particular has **50%** reach and almost a quarter of the share of Podcast listening hours with **26%**.



It appears Podcasts are a popular accompaniment on a journey . Driving or travelling has a reach of **38%** and **26%** share of Podcasting Hours.



Listener Profiles

'Listen Again' services
favour listeners aged
35-44.

61%
of people that
listen to Podcasts
are Male.

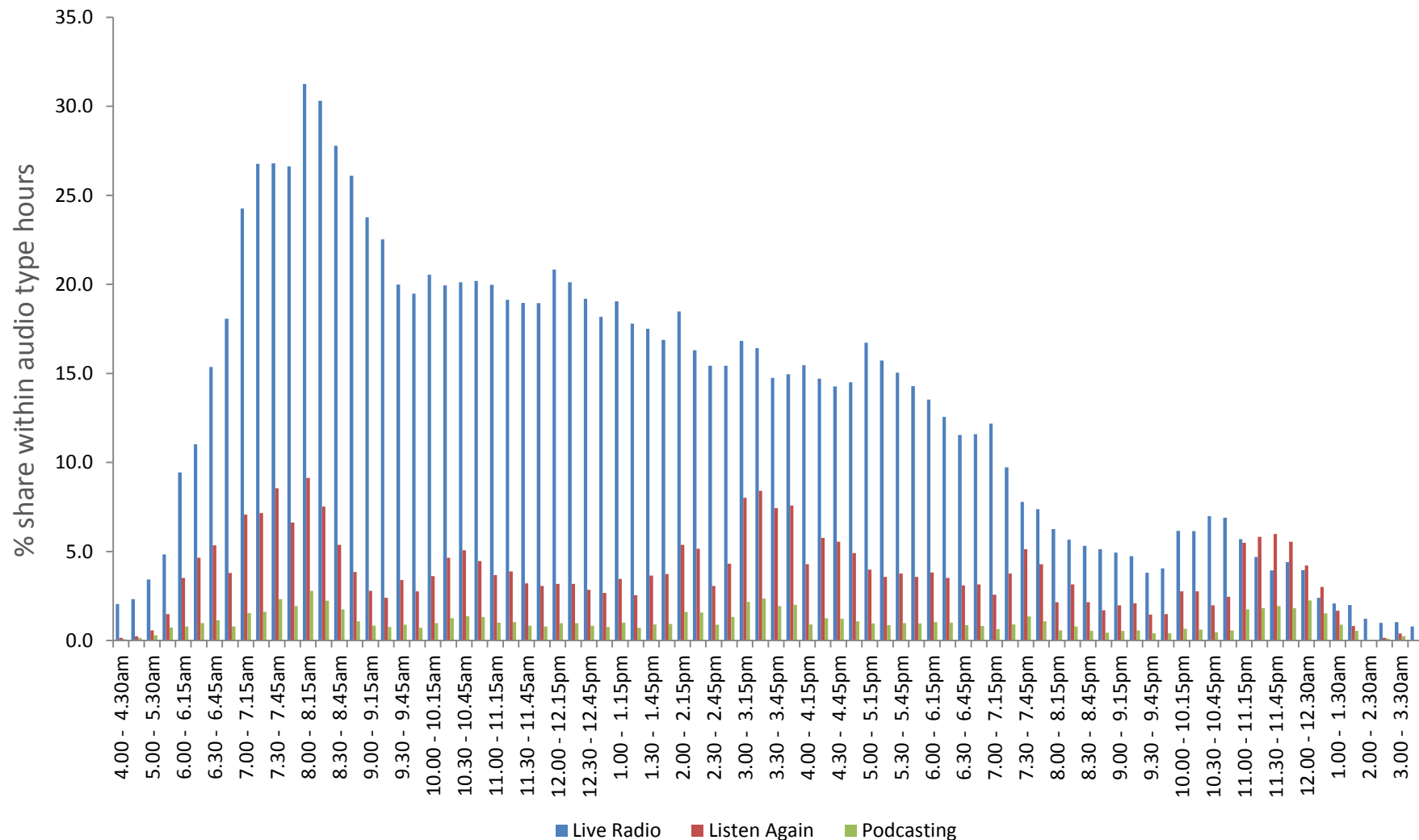
52%
of Live Radio
listening hours is
done alone.

48%
of those who
downloaded a
radio app, use it
at least once per
week

9.8 million
people have used
Radioplayer



Time of Day Listening takes place – MONDAY to FRIDAY average



Sample comprised of 2643 re-contacted respondents from the main RAJAR Survey.

Fieldwork was conducted during April/May 2015

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