

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.

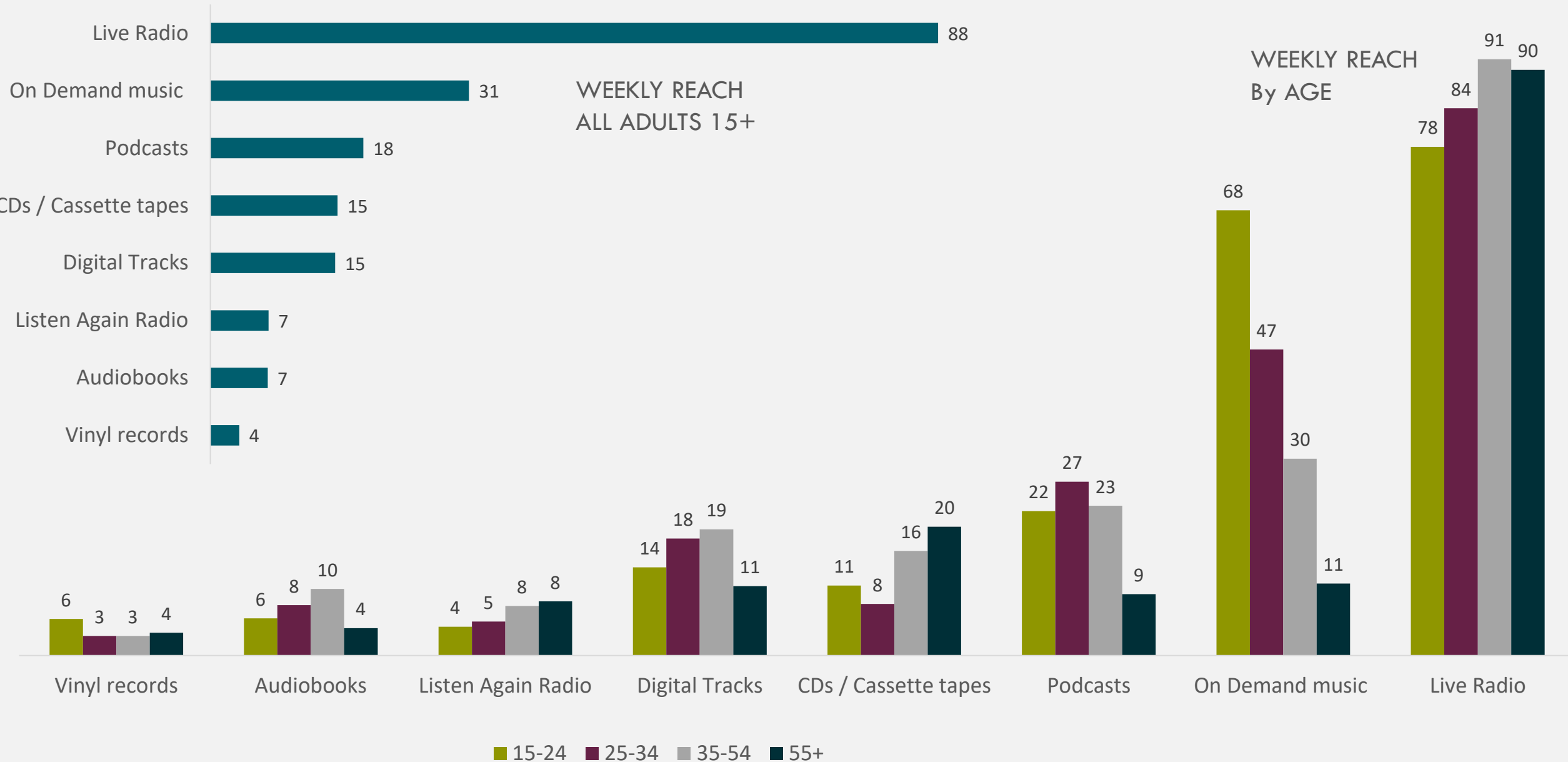
MIDAS is released every season, this offering is Spring 2020. The sample comprised of 2351 former RAJAR respondents willing to be re-contacted. MIDAS is collected via an Online diary and Questionnaire. Spring 2020 fieldwork took place during February to be published in April. Demographic split's of the 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;

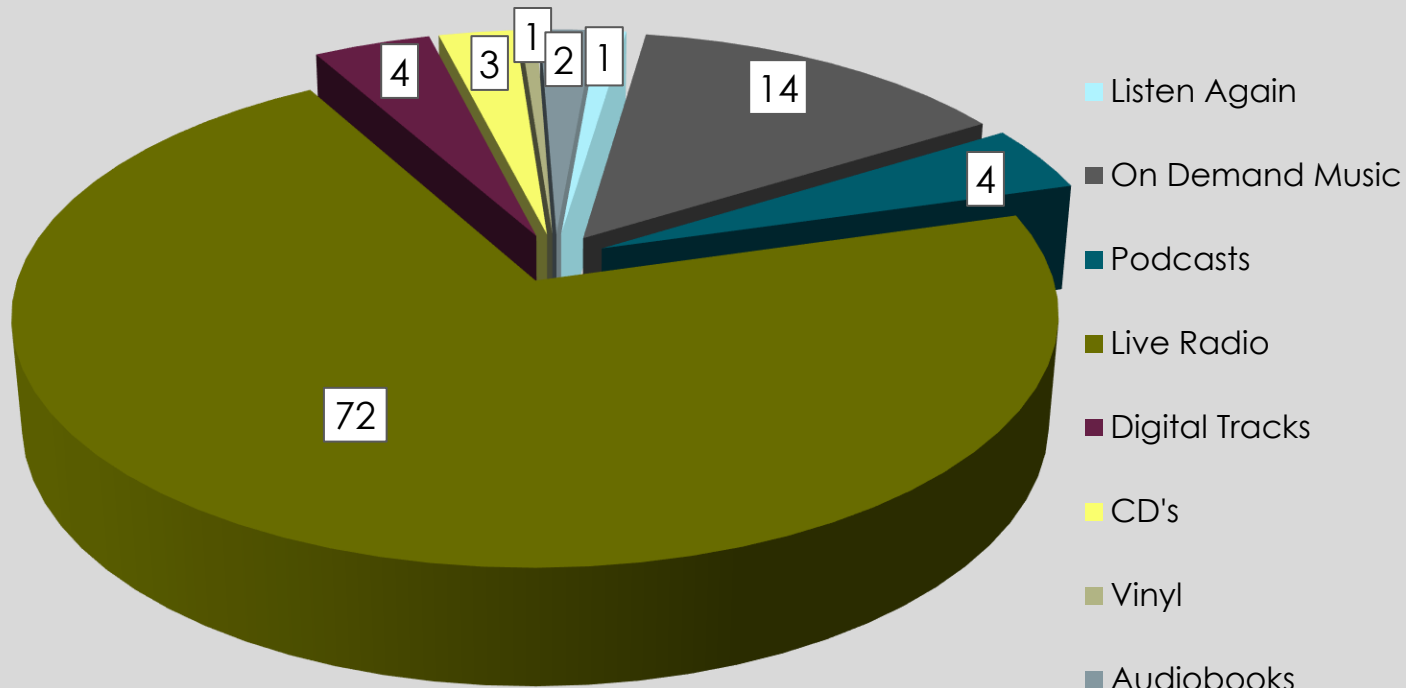
- Audio Overview
- Wave on Wave Trends
- Live Radio
- Listen Again
- Podcasting
- On Demand Music Services
- Devices
- Time Spent

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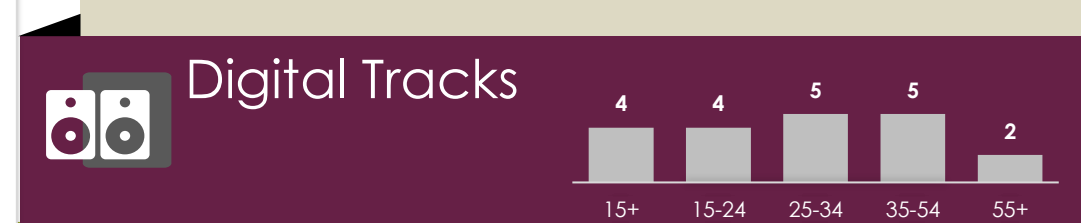
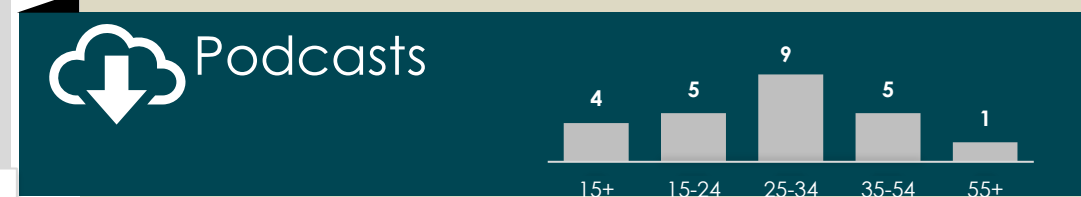
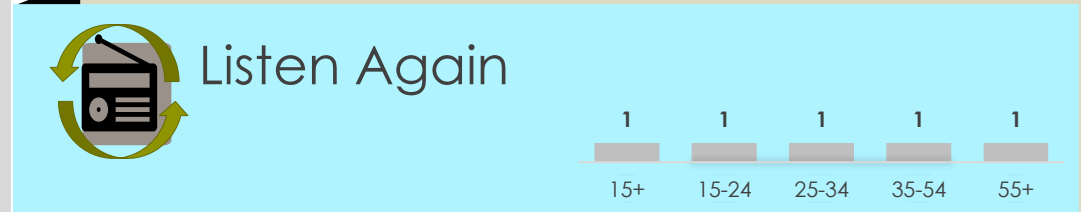
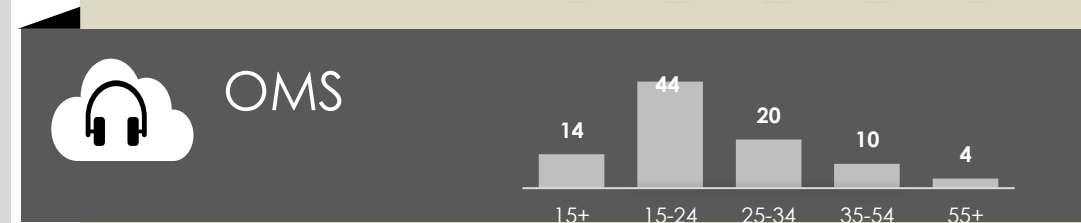
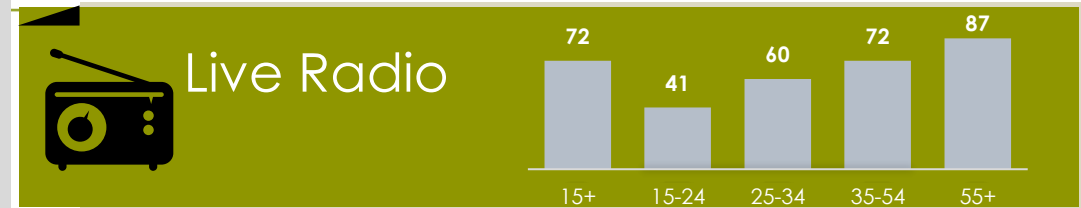


AUDIO OVERVIEW

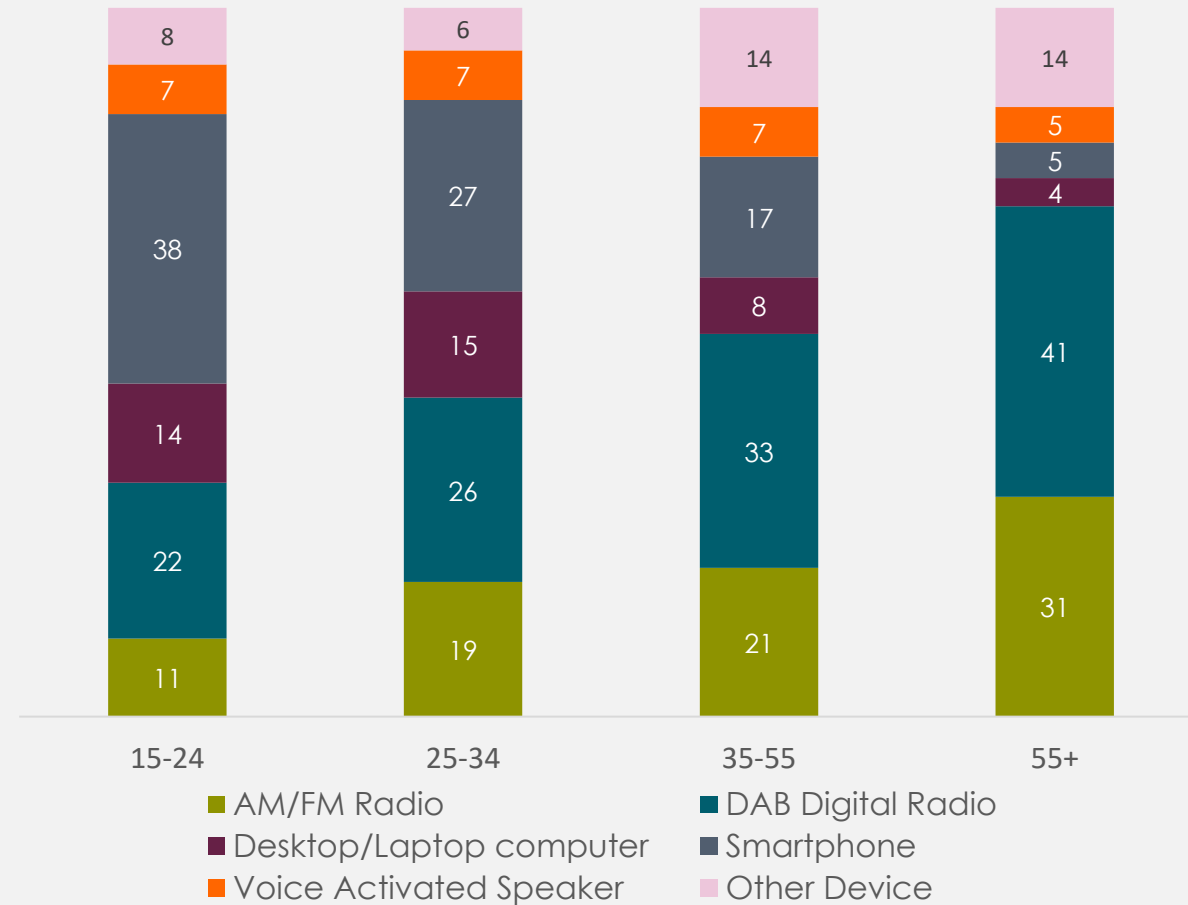
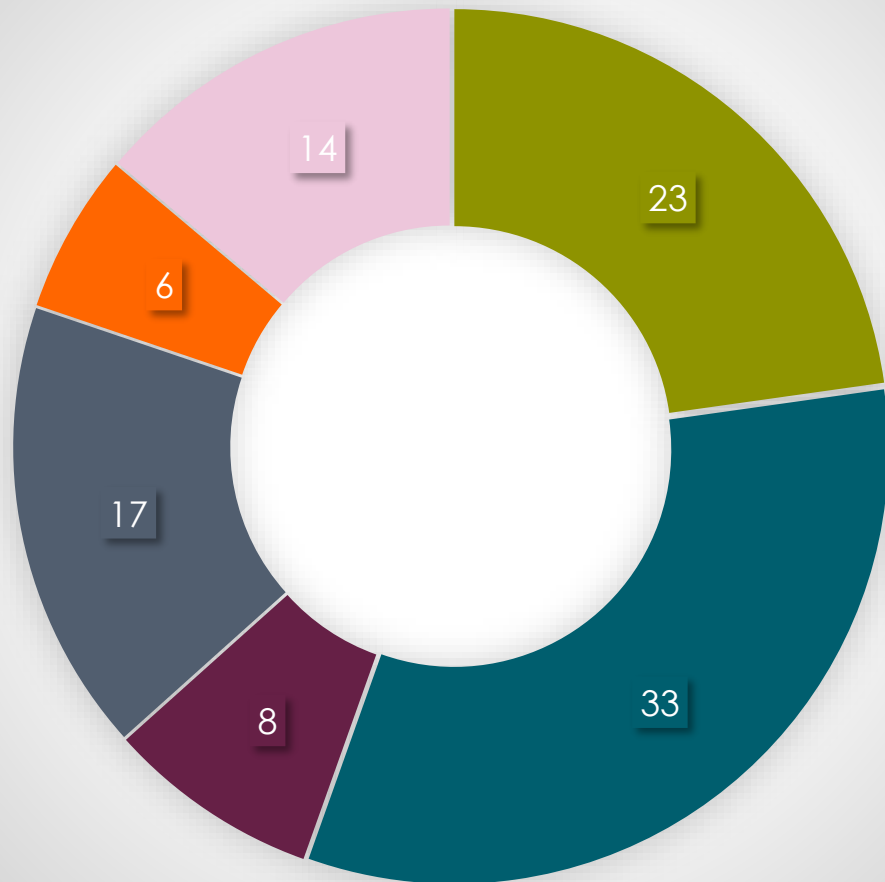


Audio (excluding visual) by Share % for All Adults 15+

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



AUDIO OVERVIEW

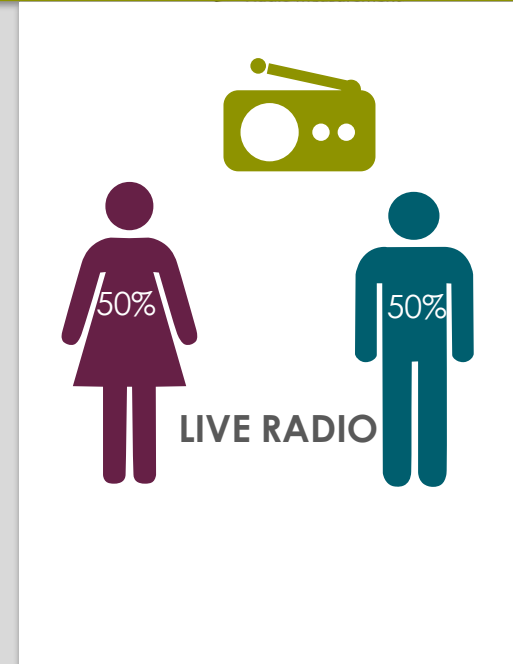
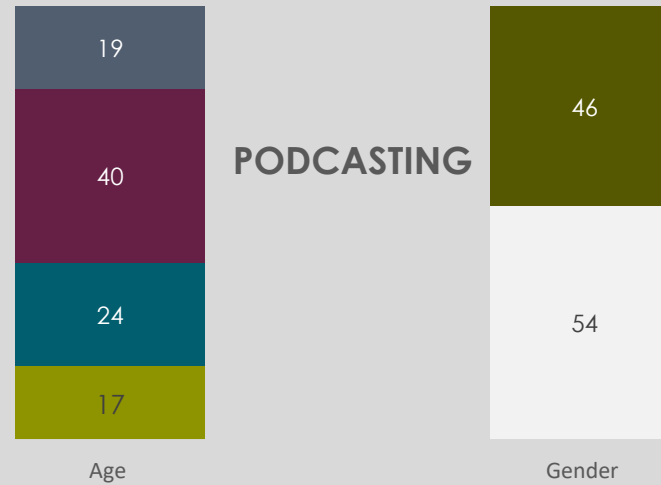
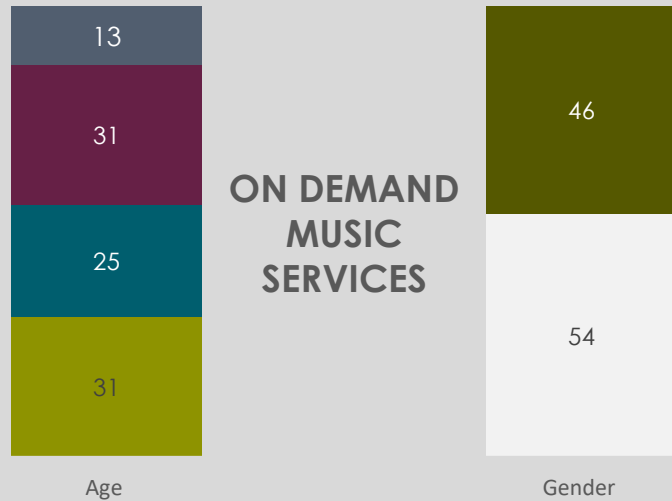


Audio (excluding visual) by Device Share % for Demographics (15-24, 25-34, 35-54 and 55+)

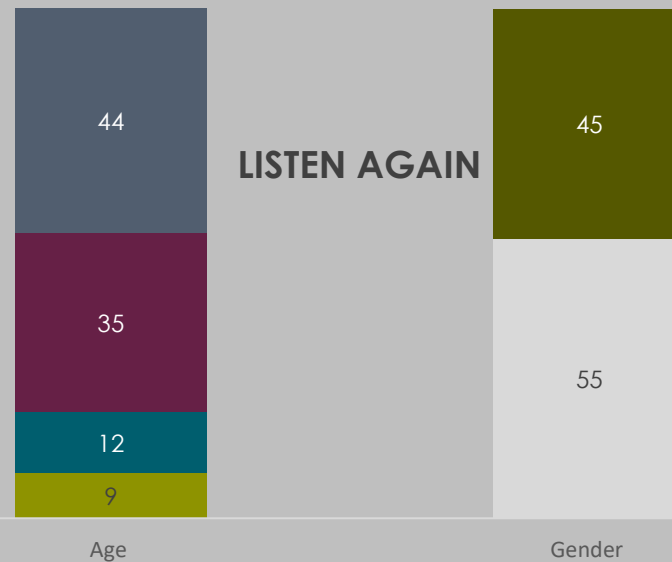
Audio (excluding visual) by Device Share % for All Adults 15+

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

AUDIO OVERVIEW



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

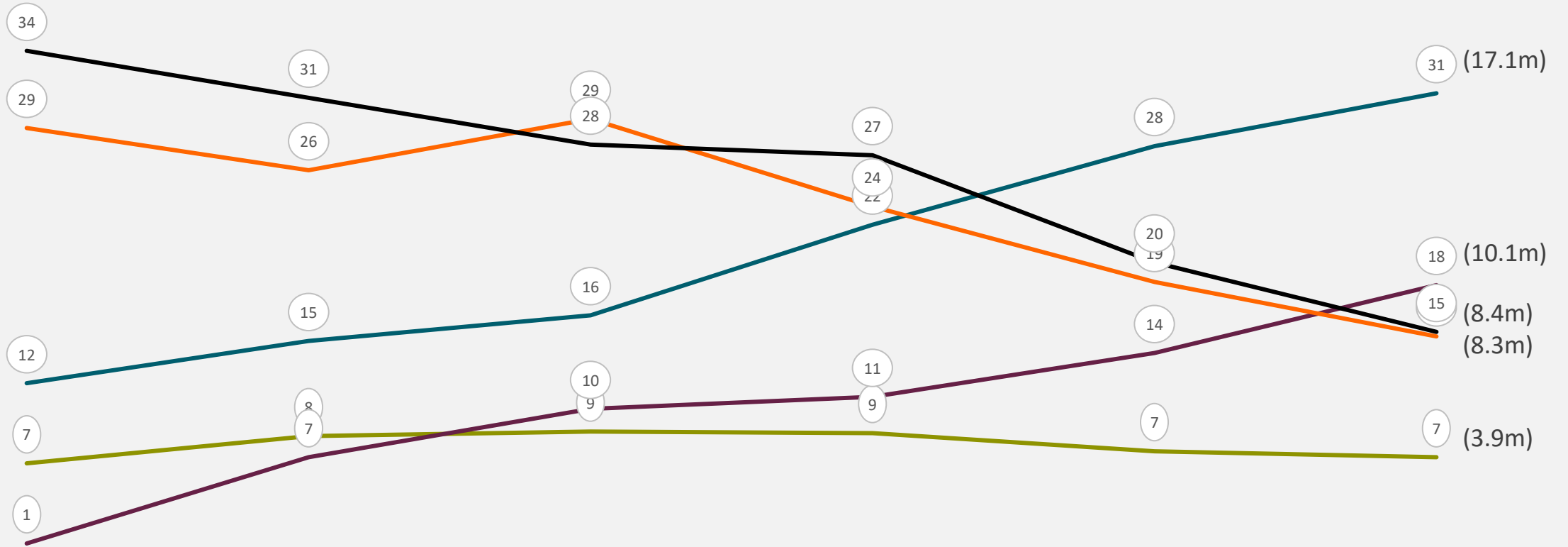


Listen Again or Catch up radio is favoured in the older demographics.

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 Live Radio evenly split

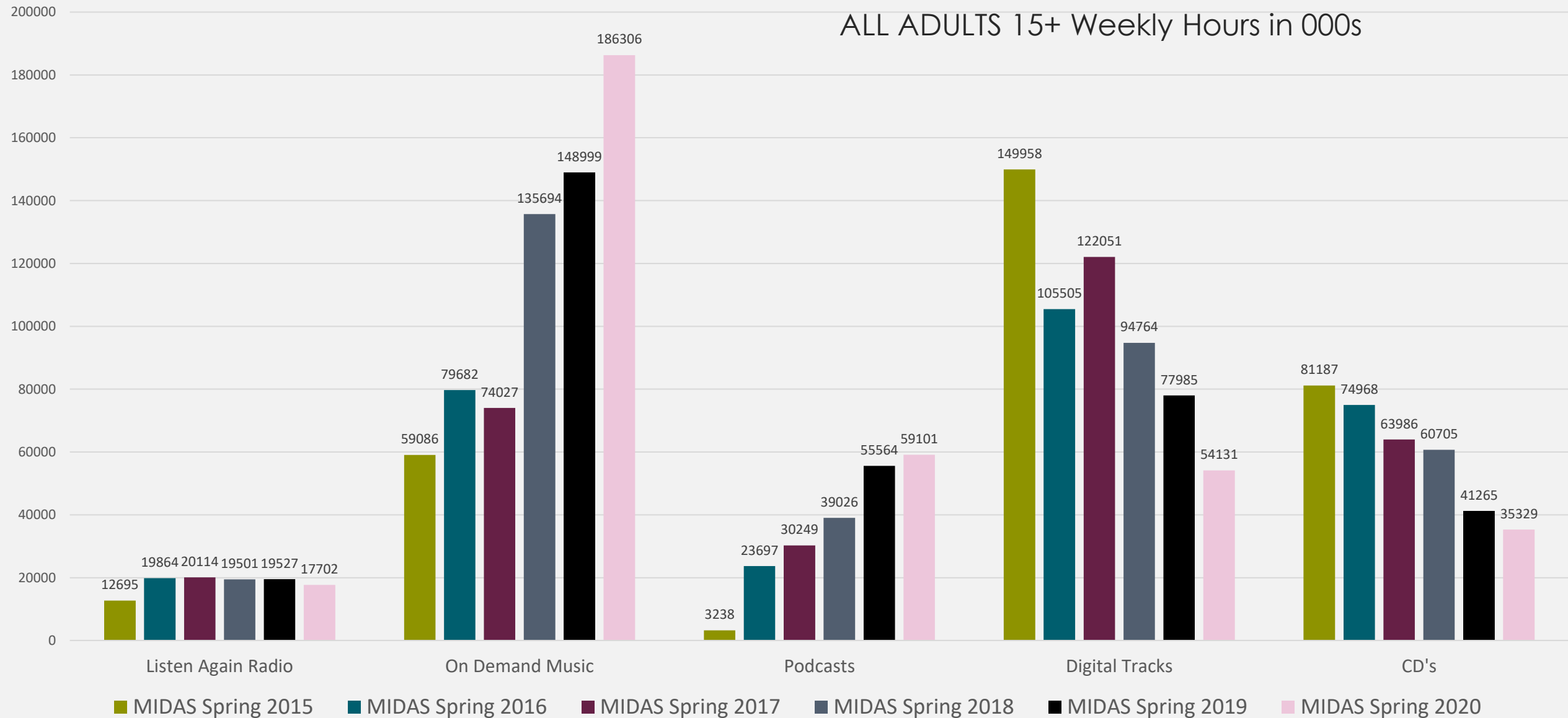
WEEKLY REACH % (millions)



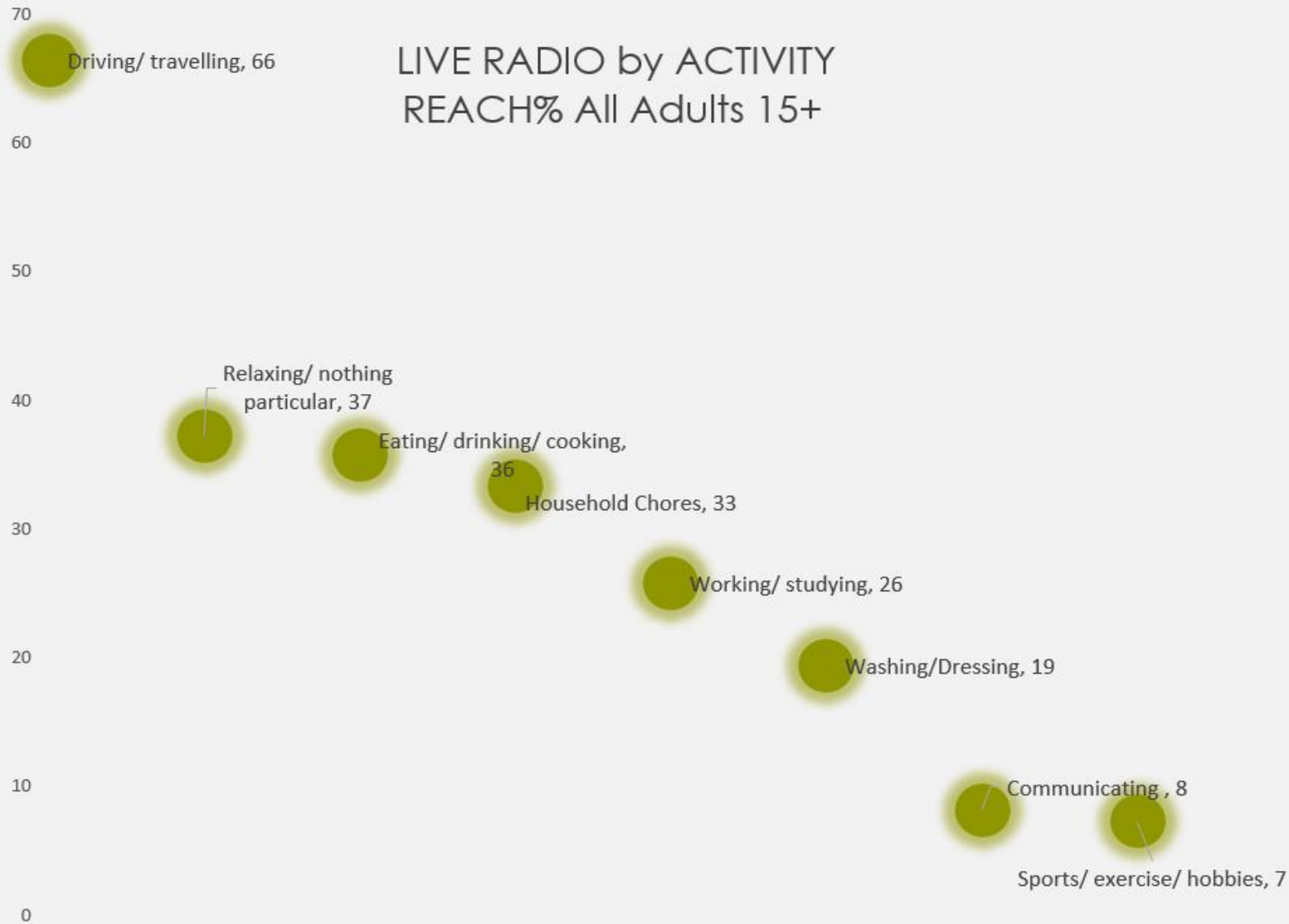
2015	2016	2017	2018	2019	2020
Spring	Spring	Spring	Spring	Spring	Spring
MIDAS	MIDAS	MIDAS	MIDAS	MIDAS	MIDAS

— Listen Again Radio — On Demand Music — Podcasts — Digital Tracks — CD's

ALL ADULTS 15+ Weekly Hours in 000s



## LIVE RADIO by ACTIVITY REACH% All Adults 15+



**23%**

**of live radio hours**  
are listened to whilst  
Driving/Travelling



**76%**

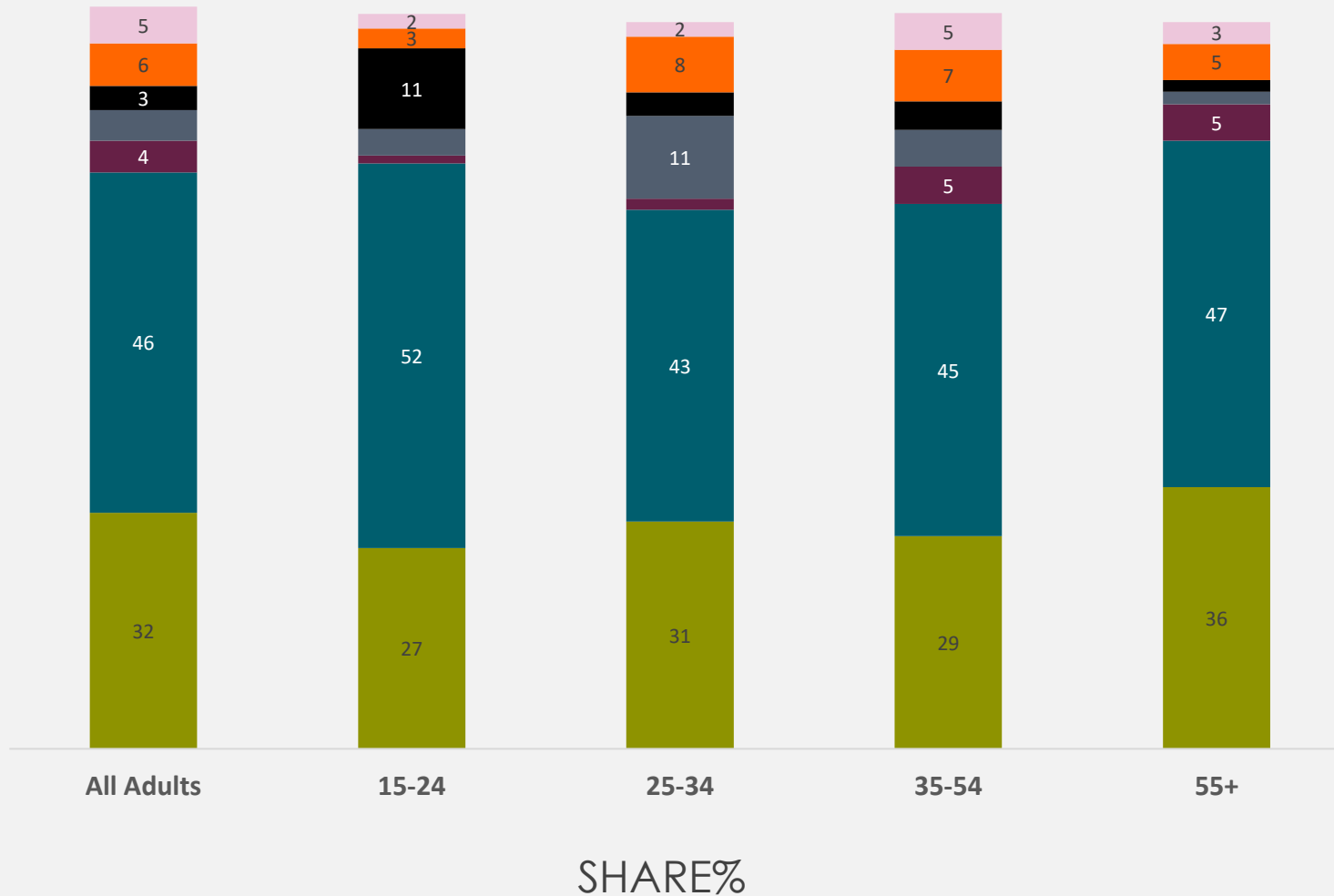
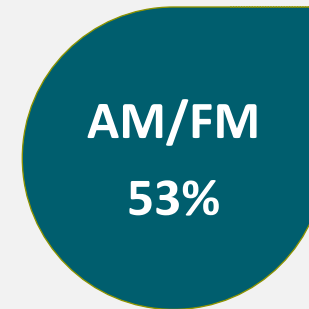
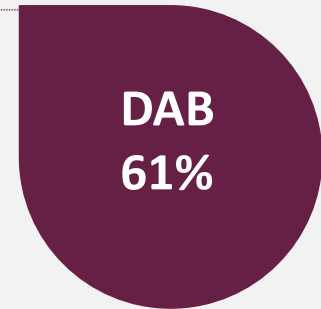
Of new music discoverers,  
still consider the Radio to  
be important for finding  
new stuff.



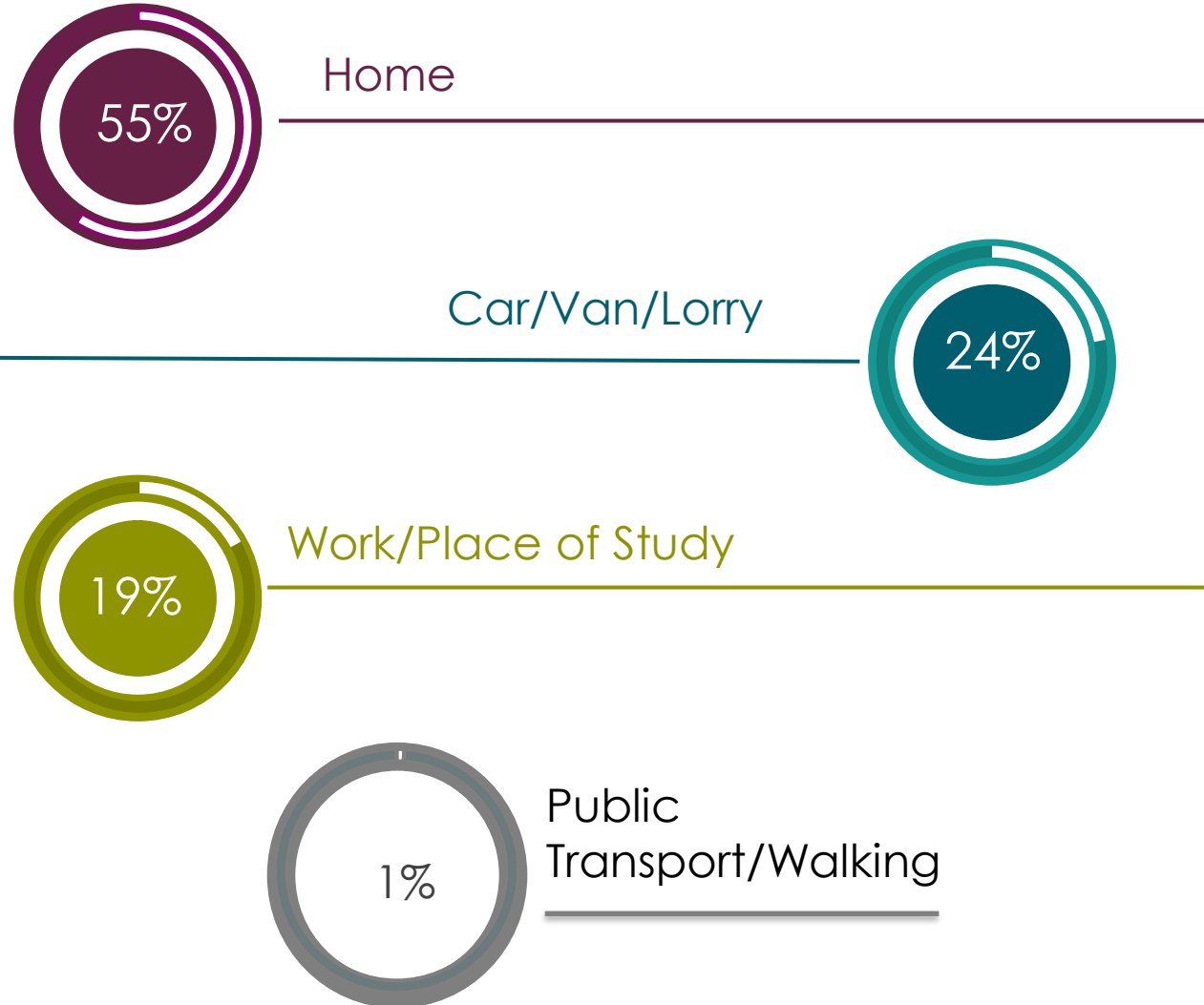
- AM/FM Radio
- DAB Digital Radio
- TV
- Desktop/Laptop computer
- Mobile Phone - Smartphone
- Voice Activated Speaker
- Other Device

### LIVE RADIO by DEVICE

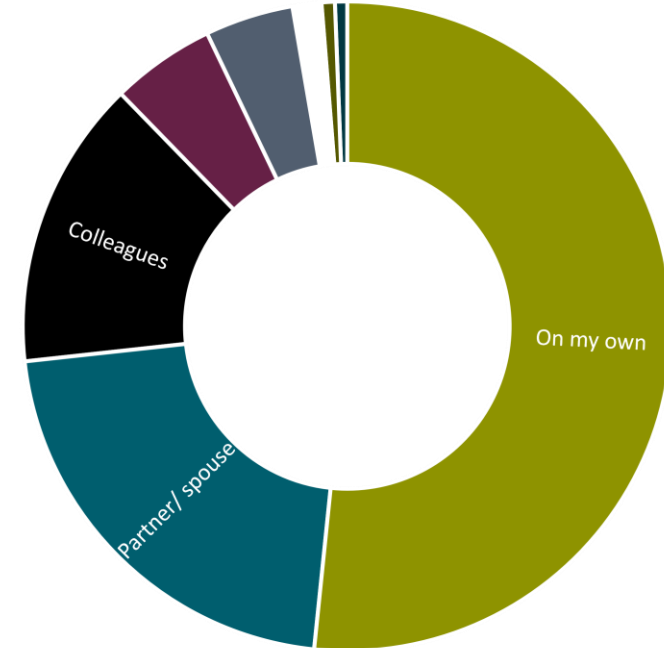
REACH%



## LIVE RADIO via LOCATION and WHO WITH



\*1% elsewhere

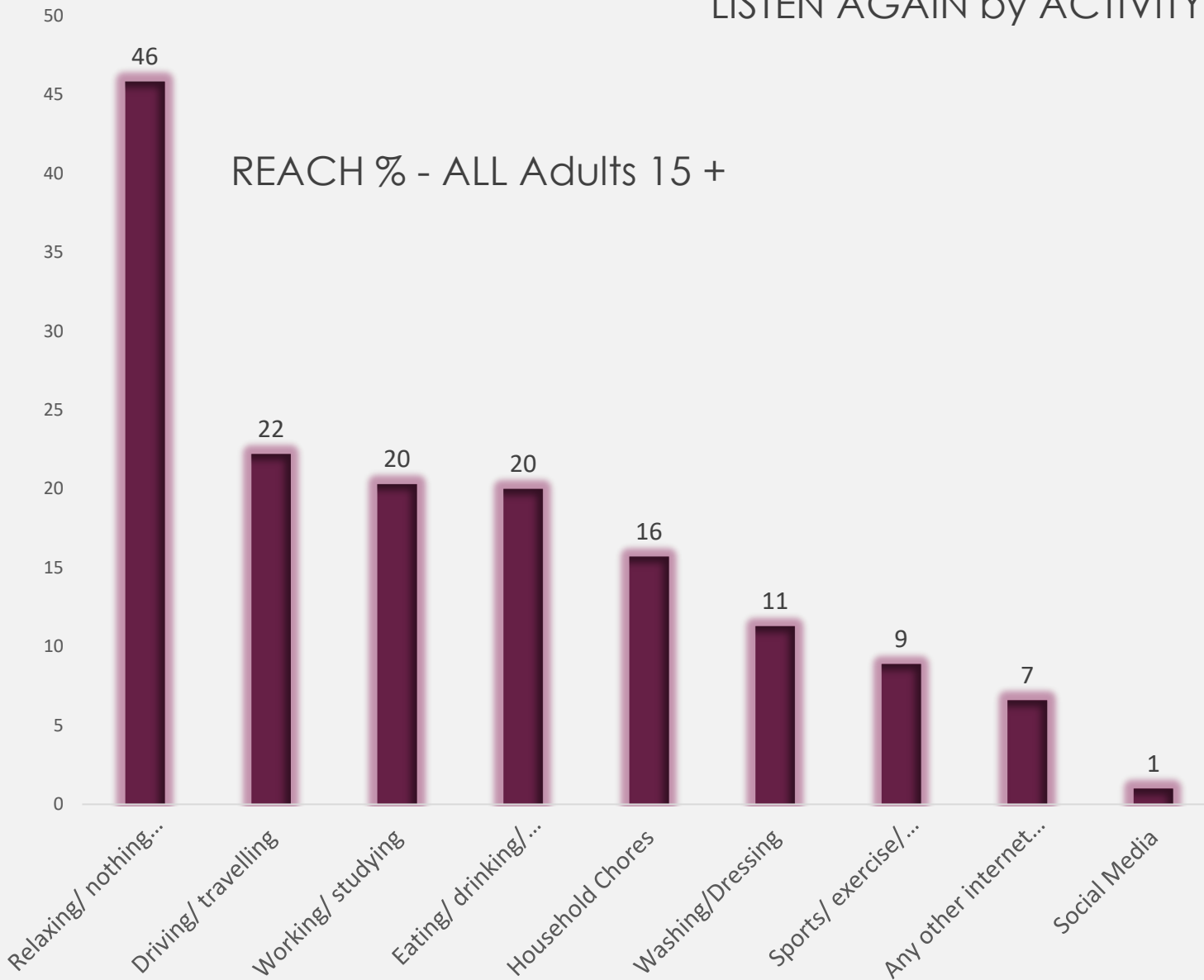


Over half (51%) of live radio listening is done alone, this is consistent through the age demographics. 20% with a partner or spouse and 16% with work Colleagues.

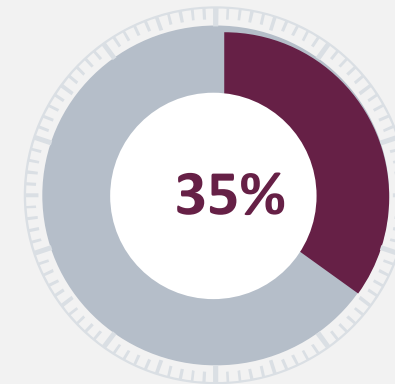
In 'home' dominates live radio listening hours with a share of 55%, in vehicle 24%, at work or place of study 19%

## LISTEN AGAIN by ACTIVITY

REACH % - ALL Adults 15 +



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.



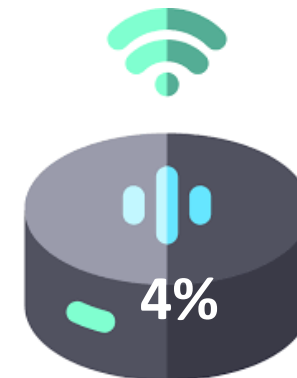
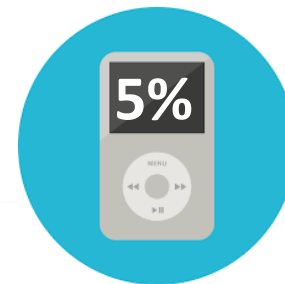
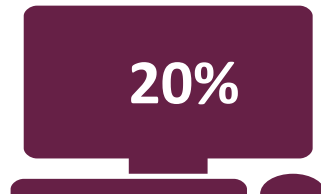
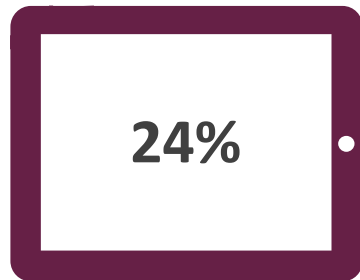
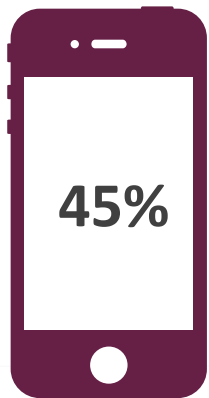
35% of the Listen Again hours are done whilst relaxing or nothing in particular.

## LISTEN AGAIN by DEVICE

Smartphones are the most frequently used device to go back and listen to a radio programme at a later date. (45%) of catch up radio listening hours were done this way, with Tablet 24% and PC/Laptop 20%. 5% Digital Music Player, Voice Activated Speaker 4%

4.7 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

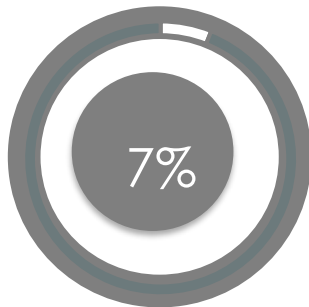


Home

Car/Van/Lorry

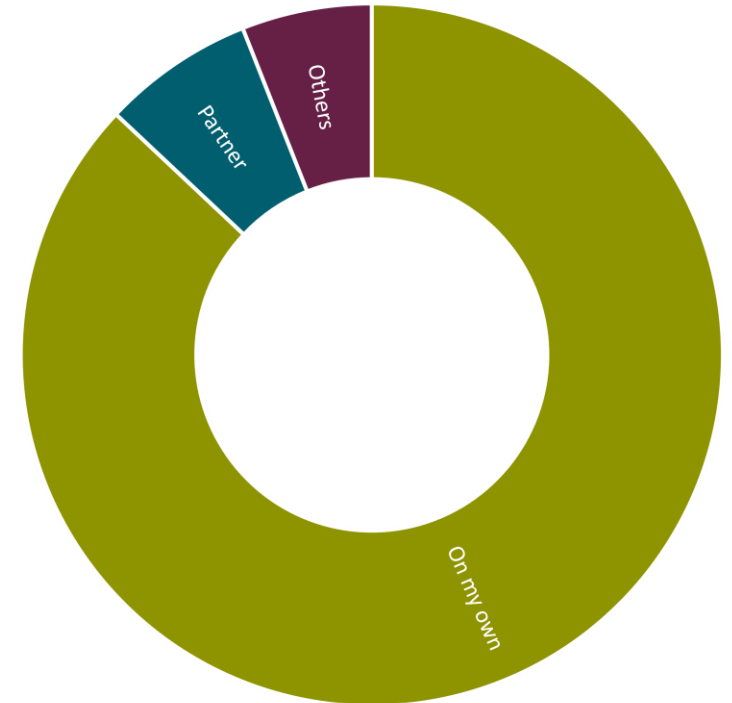


Work/Place of Study



Public Transport/Walking

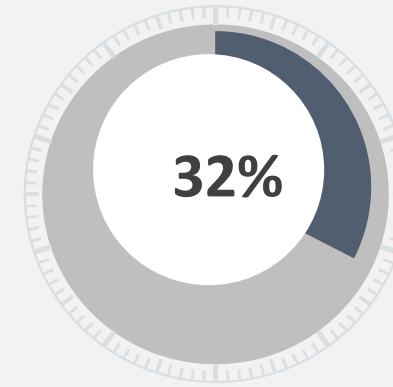
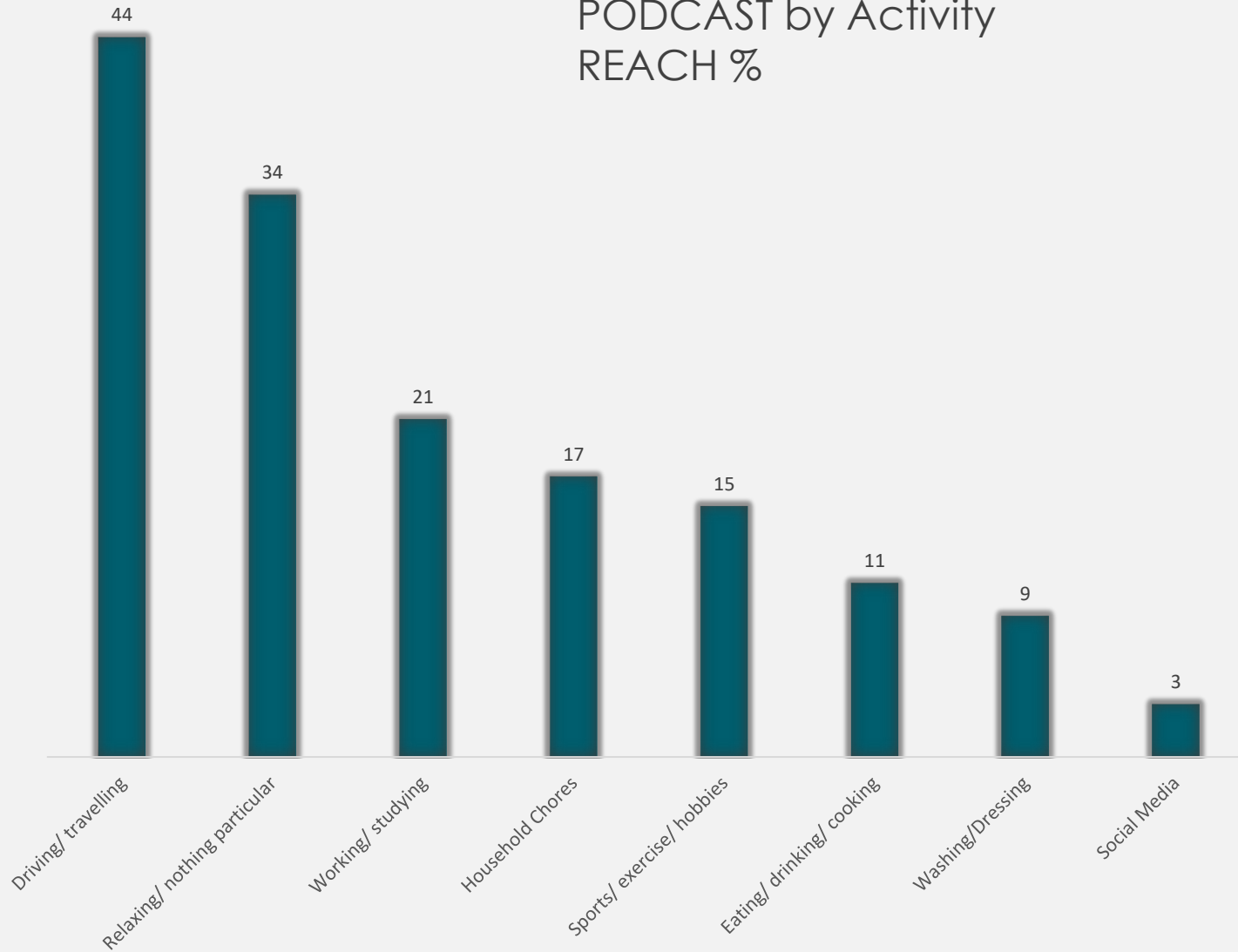
\*7% Elsewhere



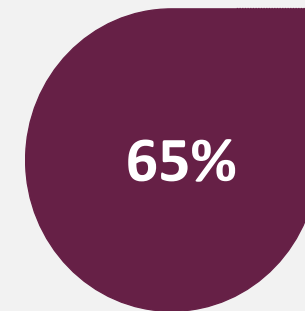
87% of Catch Up or Listen Again radio hours are spent listening on a person's own, only 8% with a partner or spouse and 5% with others.

70% of Catch Up radio listening is done at Home.

### PODCAST by Activity REACH %

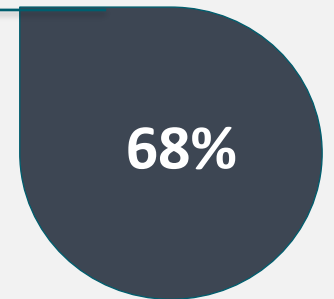


Of listening hours are done  
Driving/Travelling

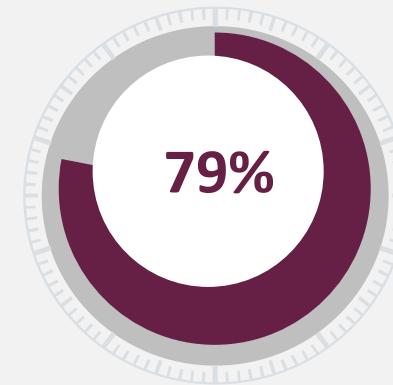
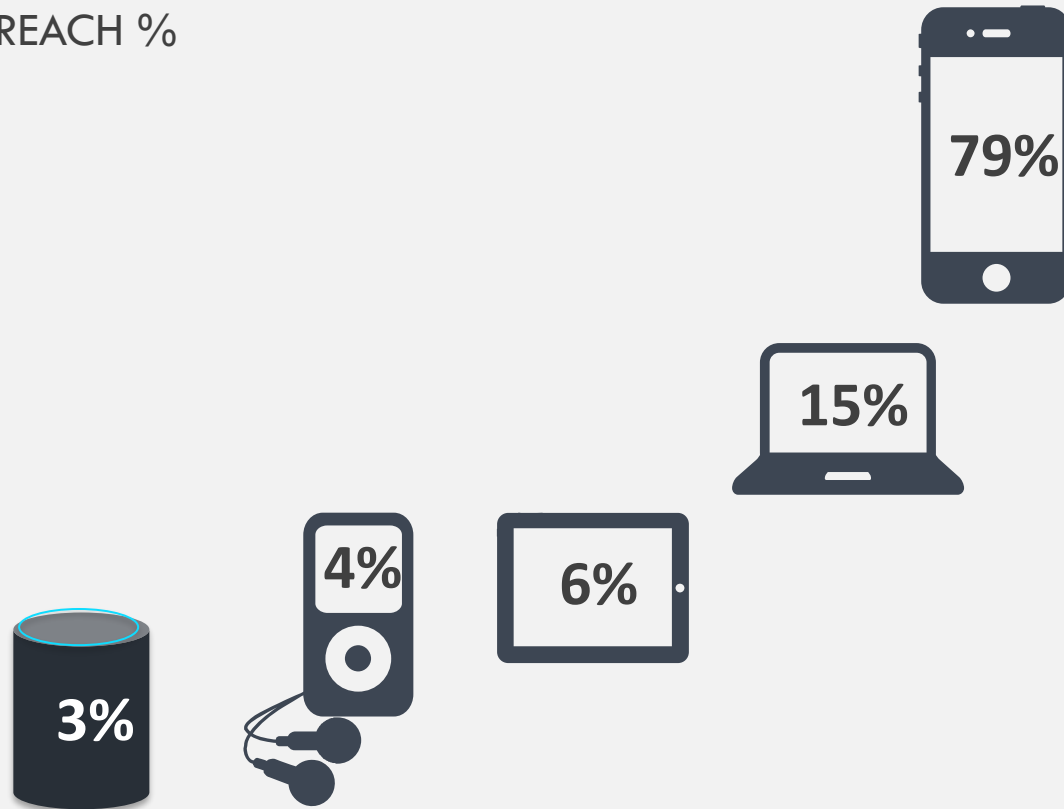


Of Podcast listeners listen to whole episode

listen to mostly all of the episodes they download.



PODCASTING VIA DEVICE  
REACH %



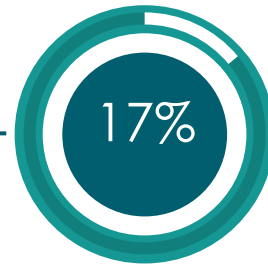
Mobile Phones are the preferred device for listening to Podcasts with a share of 79% of the listening hours.

PODCASTING via LOCATION and WHO WITH  
SHARE%

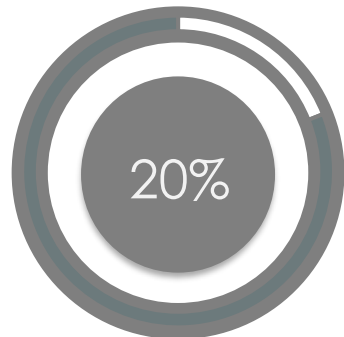


Home

Car/Van/Lorry

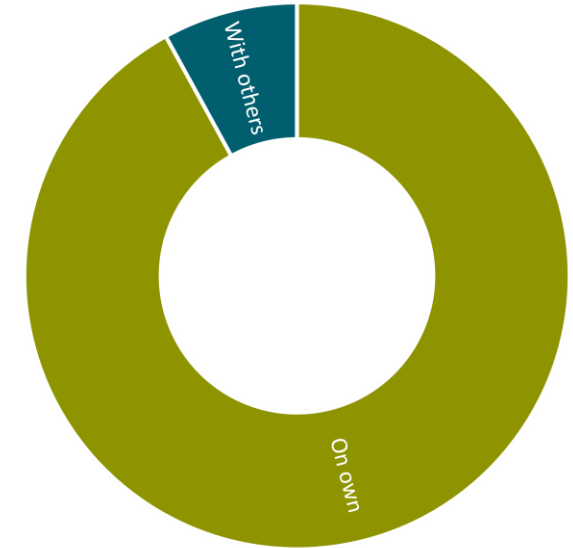


Work/Place of Study



Public Transport/Walking

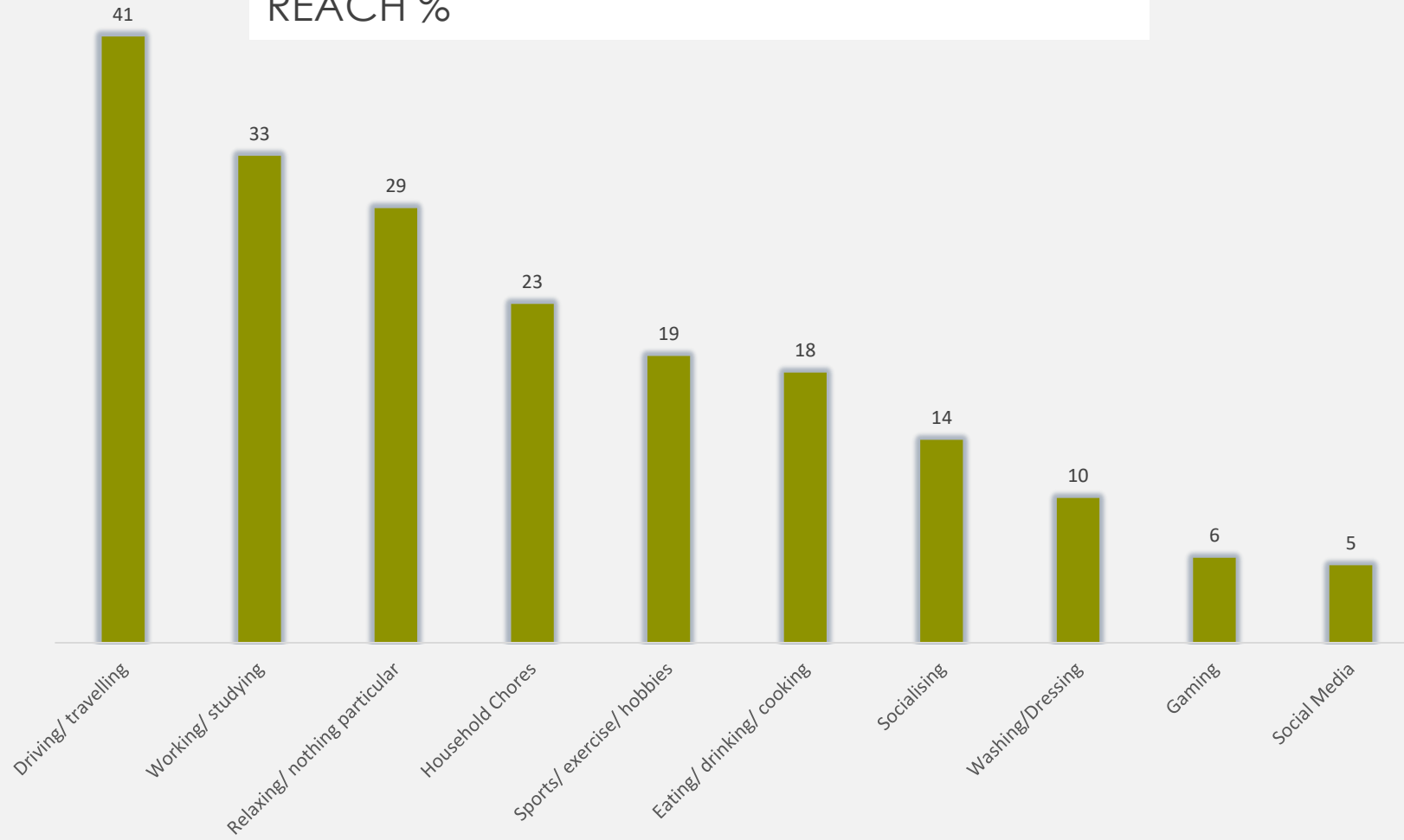
5% Elsewhere



Podcasting is almost always a solo activity, with a share of 92%



## On Demand Music by Activity REACH %



36%

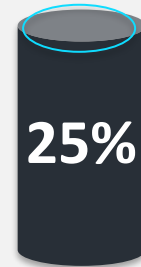
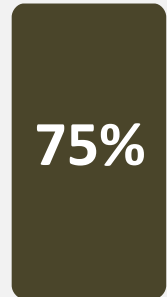
Of On demand music listened to either working or studying.

65%

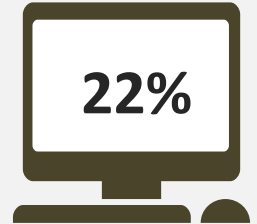
Of new music discoverers, consider On Demand Music Services to be important for finding new stuff.

# On Demand Music by DEVICE

SHARE%



REACH%



On Demand Music by LOCATION (Share) and WHO WITH

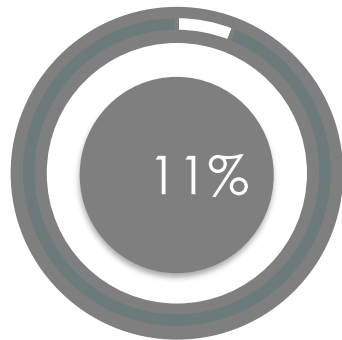


Home

Car/Van/Lorry

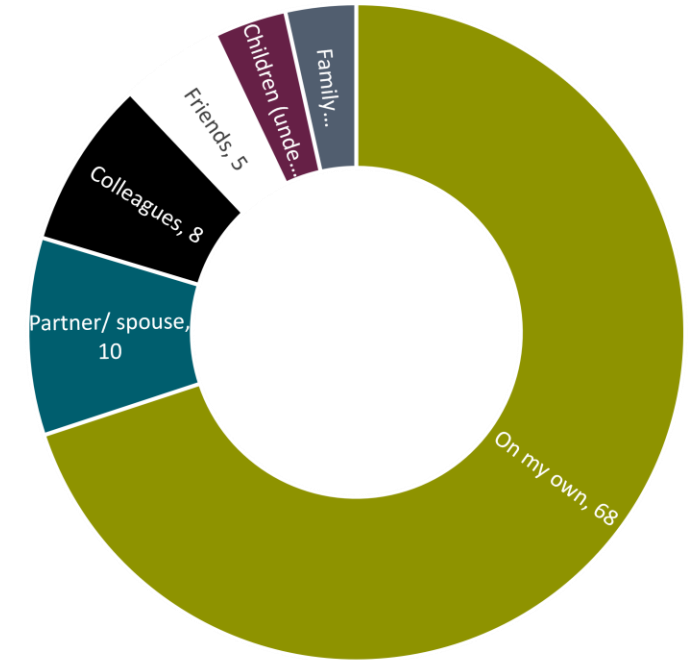


Work/Place of Study



Public Transport/Walking

6% Elsewhere



Listening to music services on demand is more sociable than other audio types such as Podcasting or Catch up Radio with 68% share of alone, 10% Partner/Spouse and 8% with Colleagues

■ Listen Again Radio ■ On Demand music ■ Podcasts ■ Live Radio ■ Audiobooks SHARE%

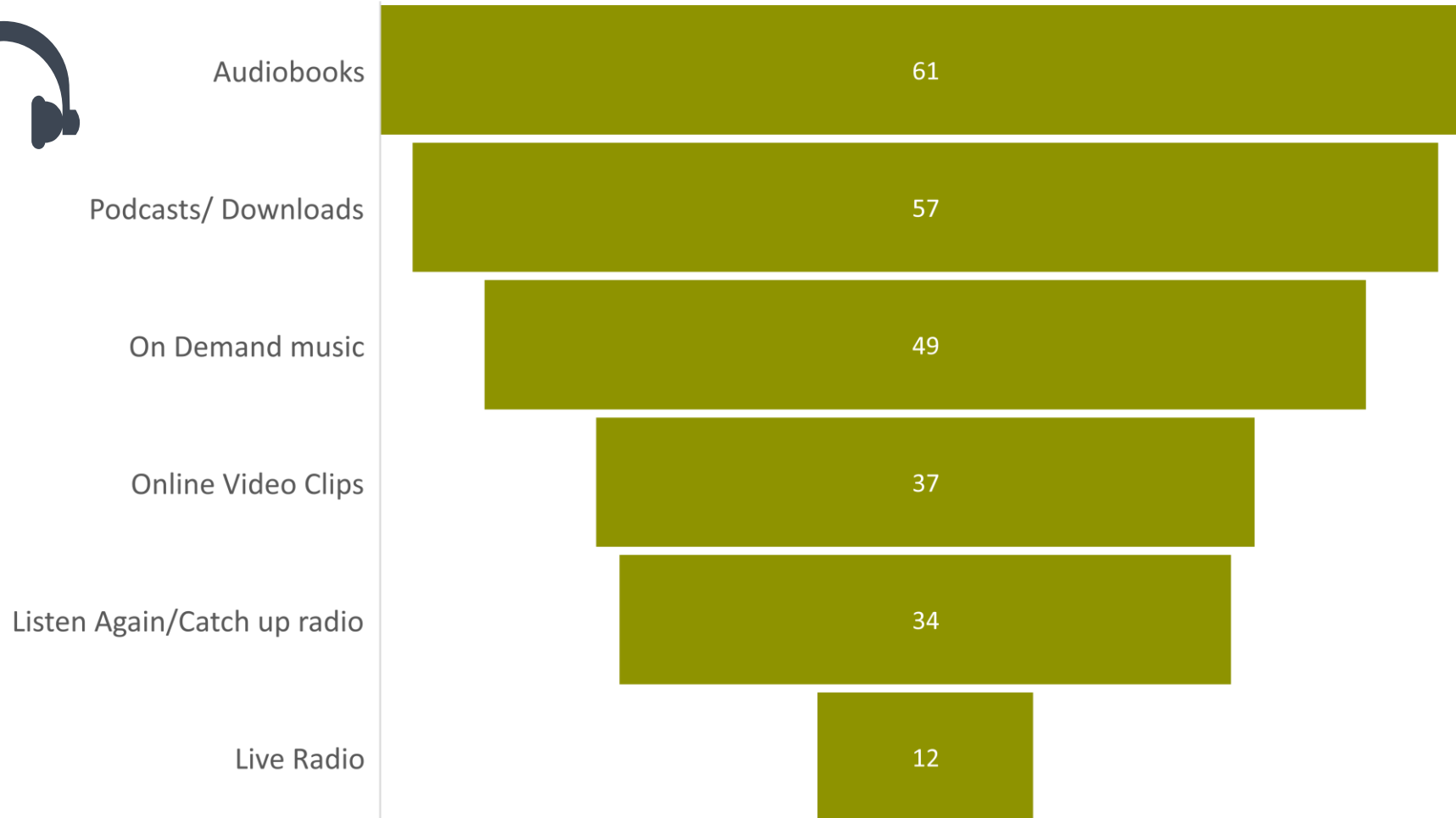


### VOICE ACTIVATED SPEAKERS

64% of all listening done on a Voice Activated Speaker such is to Live Radio. On Demand Music has a share of 32%, Podcasting 2% and Audiobooks and Listen Again 1%.

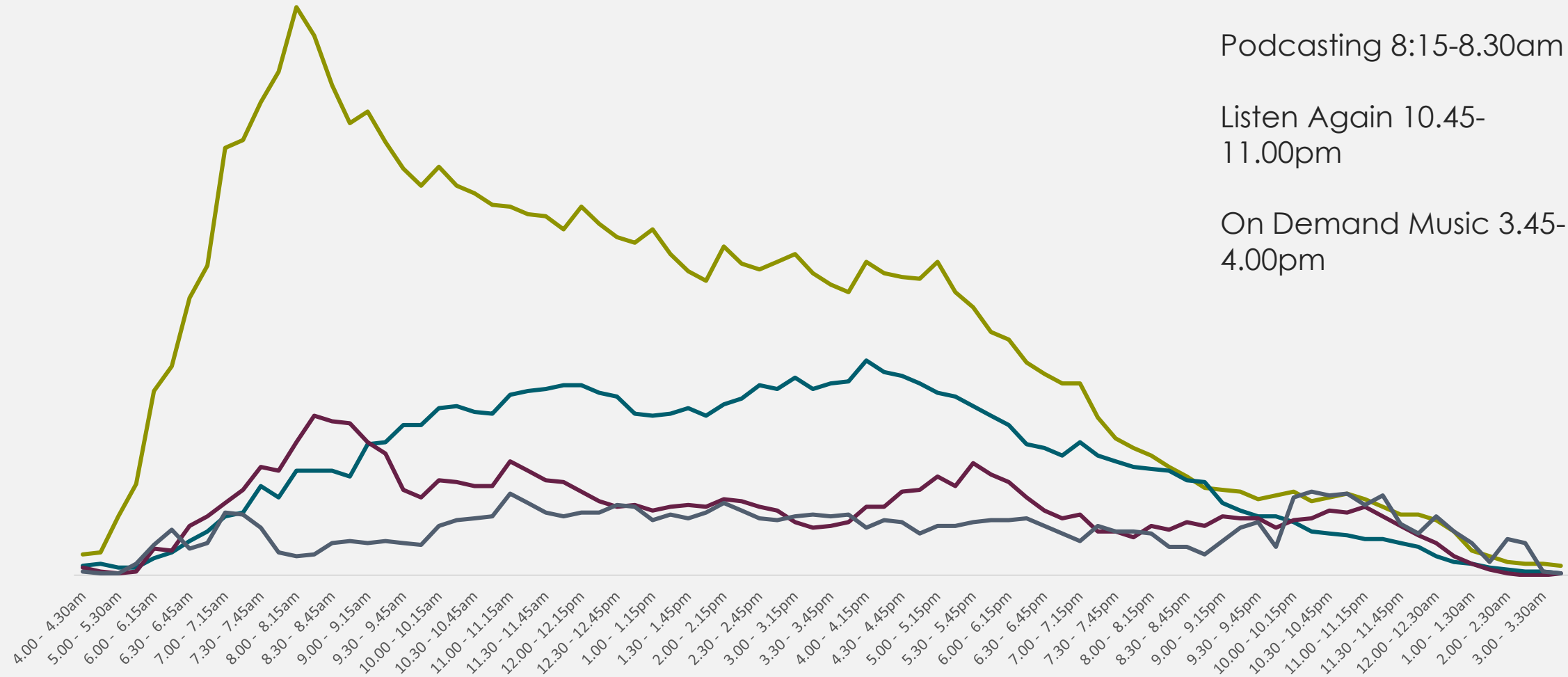
## AUDIOTYPE By HEADPHONES

REACH%



MONDAY – FRIDAY MIDWEEK AVERAGE

Weekly Reach % of listeners



Live Radio listening peaks at :8.00am-8.15am

Podcasting 8:15-8.30am

Listen Again 10.45-11.00pm

On Demand Music 3.45-4.00pm

— Live Radio — OMS — Podcasting — Listen again

## 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

## 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/Youtube Premium  
 BBC/Other Radio/ Other music podcast  
 BBC/Other Radio/ Other speech podcast  
 Online Video clips – Music/Non Music
 

- Facebook
- Vimeo
- YouTube
- Tik Tok
- 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  
 Wearable Technology

## 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

## PODCASTING PLATFORM

BBC Sounds  
 Global Player  
 Spotify  
 Apple/itunes Podcasts  
 Acast  
 Castbox  
 Pocketcast  
 Google Podcasts  
 Podbean  
 Podcast Addict