

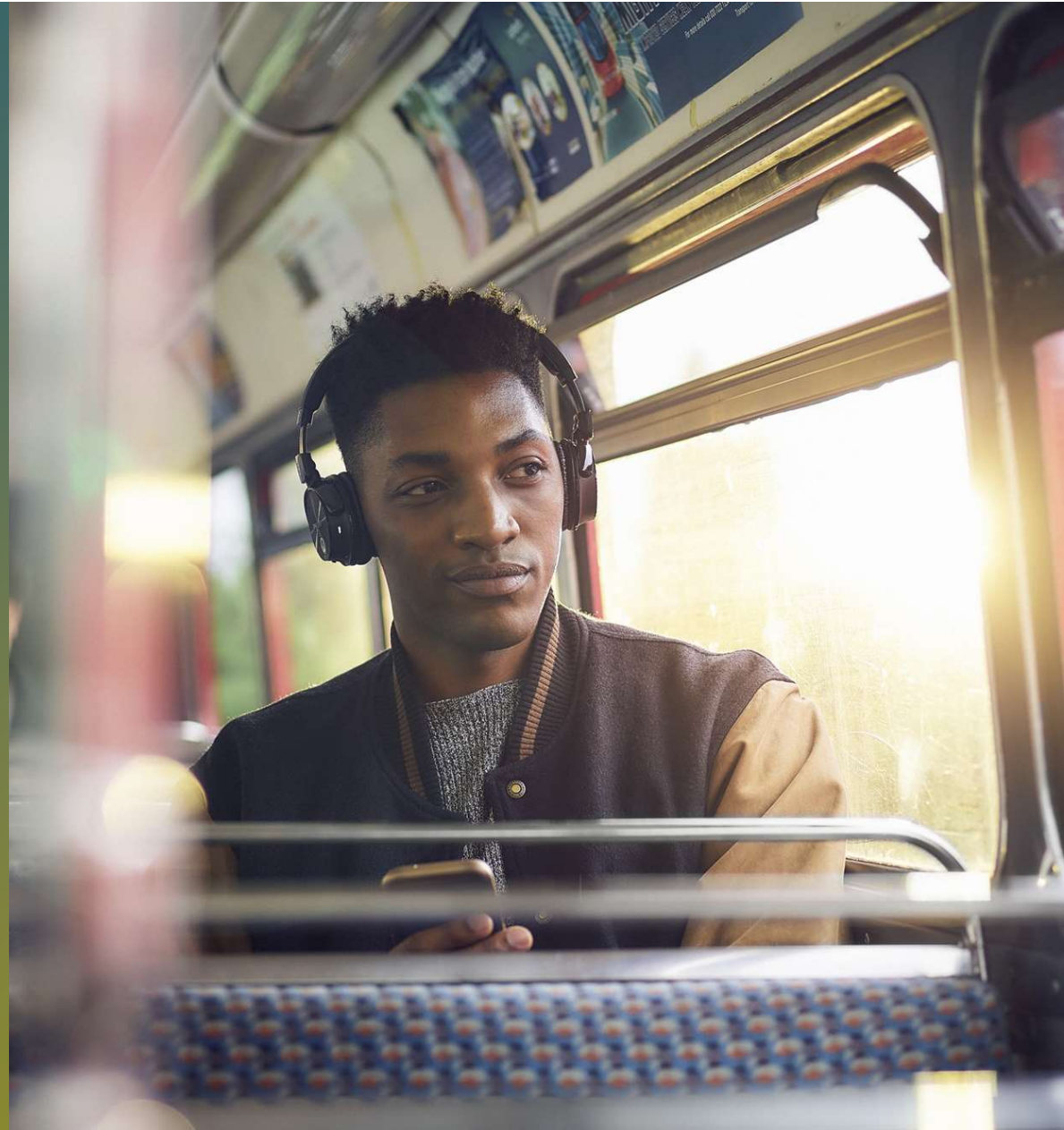


RAJAR's Audio Survey 'MIDAS' Winter 2024

The MIDAS Survey is designed to provide context and insight into how, when and where audio content is being consumed in this current liberated environment.

With the increasing penetration of connected devices such as smart speakers, smartphones and many more, 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 and how audio makes them feel.



In Summary

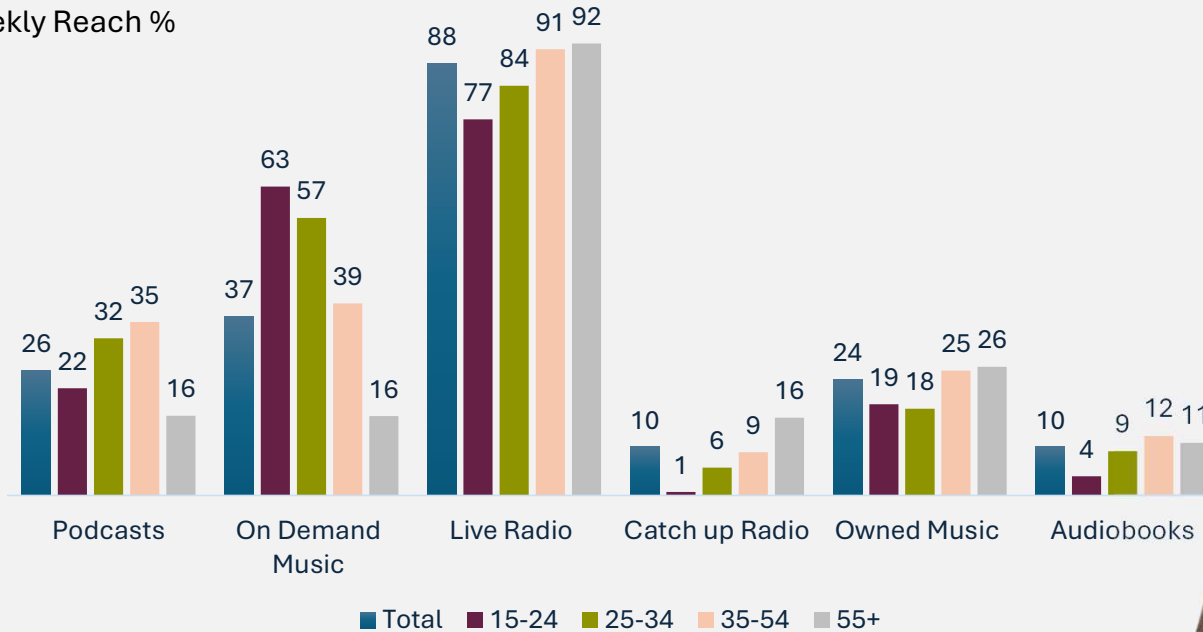
Weekly audio listening in the UK remains strong, albeit varied between age and gender. The Winter 2024 wave of MIDAS finds that the weekly reach for audio consumption that is solely listened to and not viewed, remains very high with 56 million adults or 98% of UK the population (adults 15+) doing so in a week. Listeners spend on average 28.7 hours a week engaging in their favourite audio type. The total number of weekly hours listened to audio is over 1.6 billion; this has increased by 16% since MIDAS Winter 2019.

The audio types focused on are live and catch-up radio, on demand music services, podcasts, owned music and audiobooks. For more detailed information on live radio, please see the most recent RAJAR release (Q4 2024) <http://www.rajar.co.uk/listening>

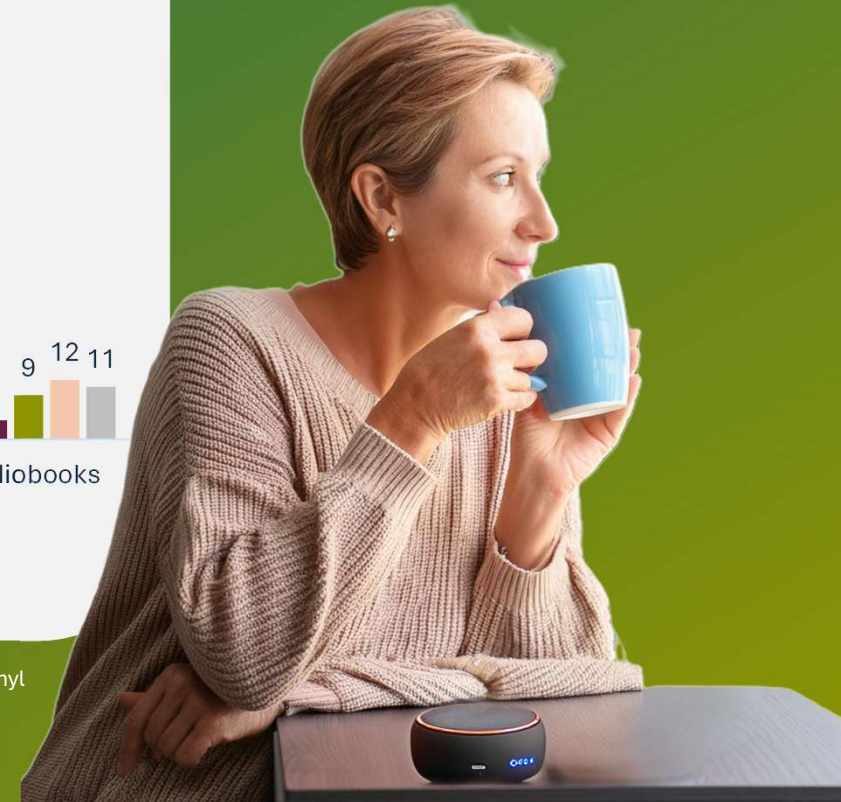
The key metrics for audio listening in the following charts are displayed by either reach or share % or numbers in 000s. Most of the information is based upon all adults (15 plus) except where specified by demographic breakdown (15-24, 25-34, 35-54 and 55+) or gender. The data behind these charts are available on request.

Weekly Audio Listening in the UK remains strong.

Weekly Reach %



*Owned music includes, Digital Tracks, CDs, Cassettes, Vinyl

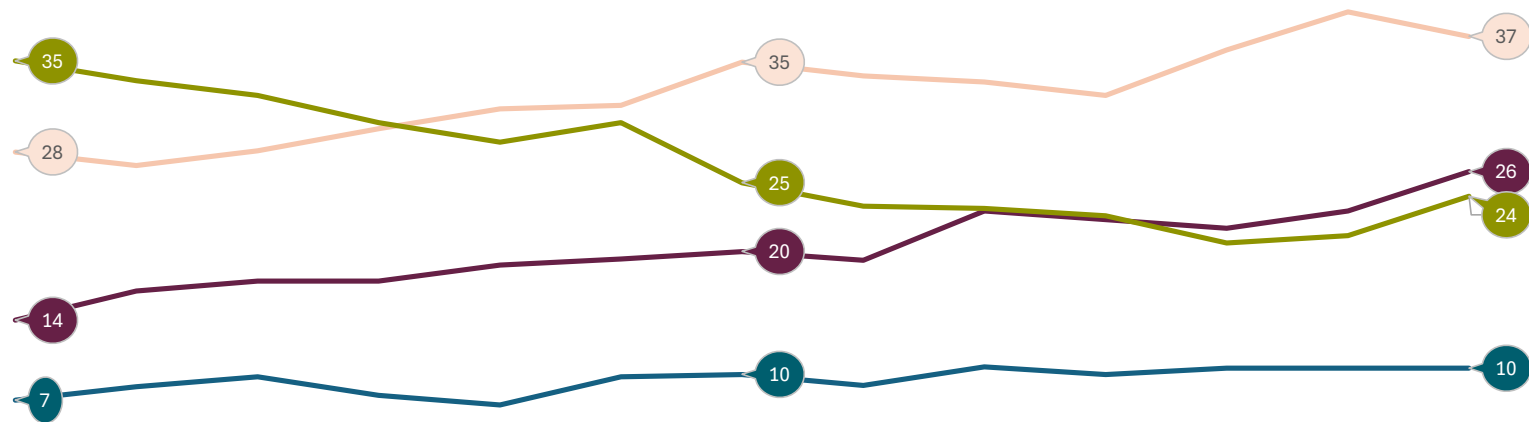


Audio Type Listening Trends.

Over the last five years, there has been a noticeable decline in weekly listening of owned music (digital tracks, CDs, Cassettes and Vinyl), albeit a slight recent resurgence.

On Demand Music services and Podcasts have become increasingly popular, whilst Catch Up radio has remained stable throughout.

Weekly Reach %



2019	2019	2019	2019	2020	2020	2021	2022	2023	2023	2024	2024	2024
Spring	Summer	Autumn	Winter	Spring	Winter	Winter	Summer	Spring	Autumn	Spring	Summer	Winter
MIDAS	MIDAS	MIDAS	MIDAS	MIDAS	MIDAS	MIDAS	MIDAS	MIDAS	MIDAS	MIDAS	MIDAS	MIDAS

— Catch Up Radio — On Demand Music — Podcasts — Owned Music

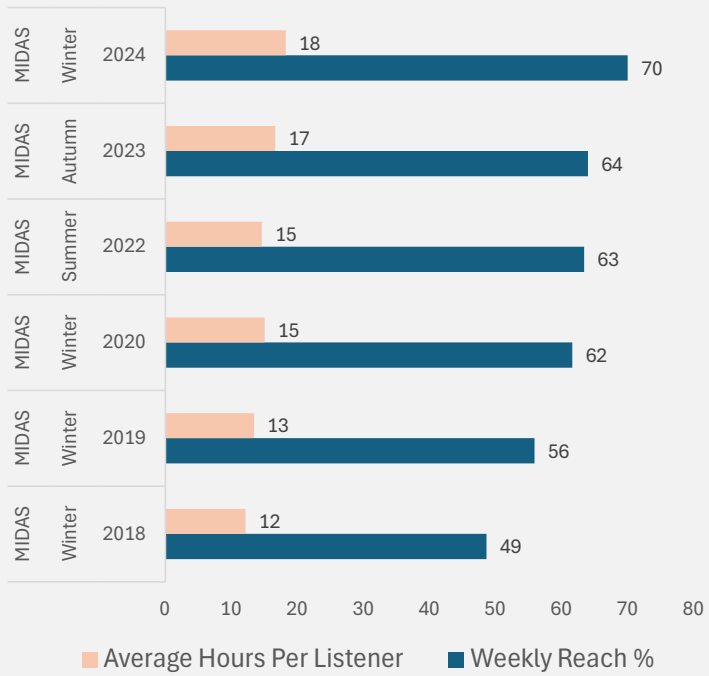
'Connected Audio' continues to grow.

The term 'connected audio' featured in this report is defined by audio consumption that can only be listened to by a device with an internet connection. This has been a particular area of growth over the last few years as the population continues to desire their listening preferences stored on their devices and accessible with a single touch.

Connected Audio reaches 70% of the population and on average adults listen for around 18 hours per week. Connected Audio weekly reach has increased by 12% from Autumn 2023 and 31% from the same period in 2019.

Connected Audio, includes Podcasts, Audiobooks, On Demand Music, Catch Up Radio and Live Radio (via smartphone, computers, games consoles, wearable tech, media players, smart speakers)

Connected Audio





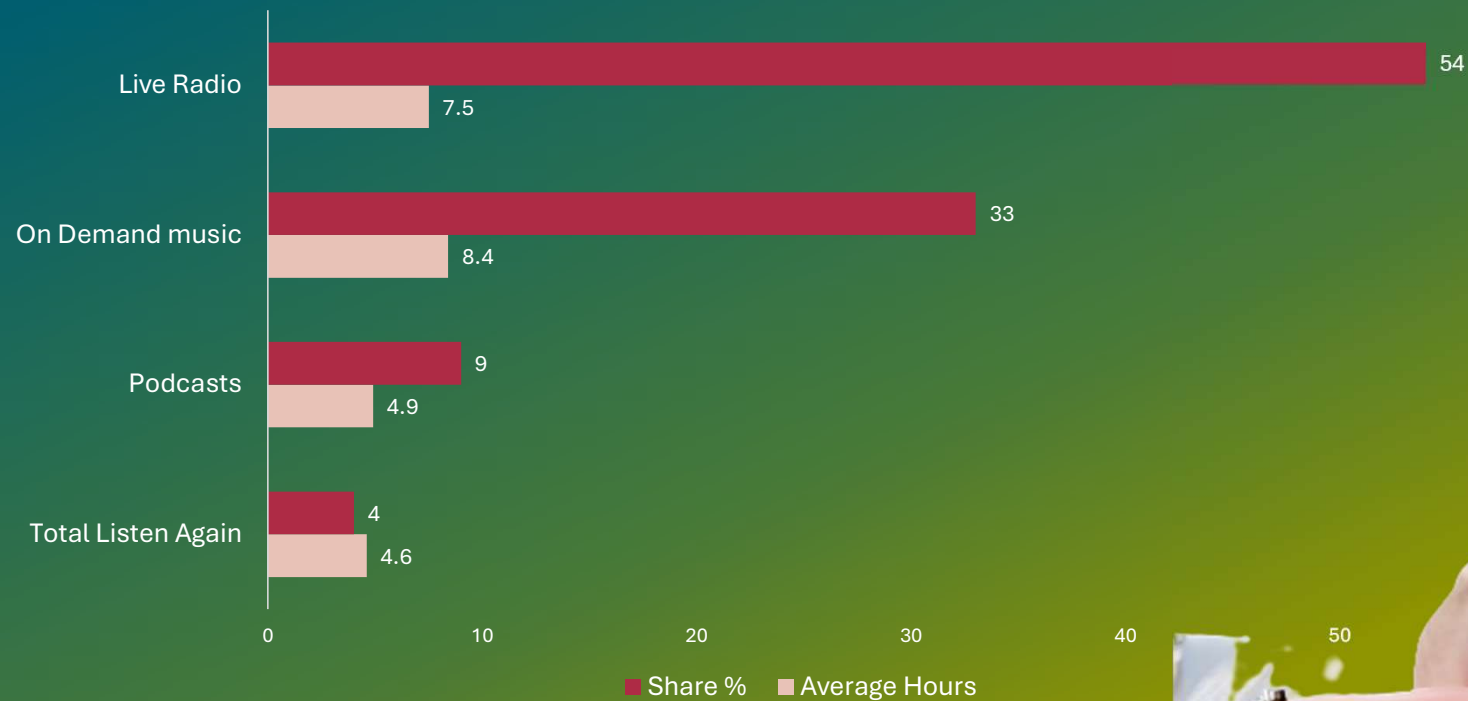
The need to feel more connected.



The MIDAS survey has recently begun asking participants their need states around audio listening; the purpose it serves them whilst listening, how it makes them feel or why they listened.

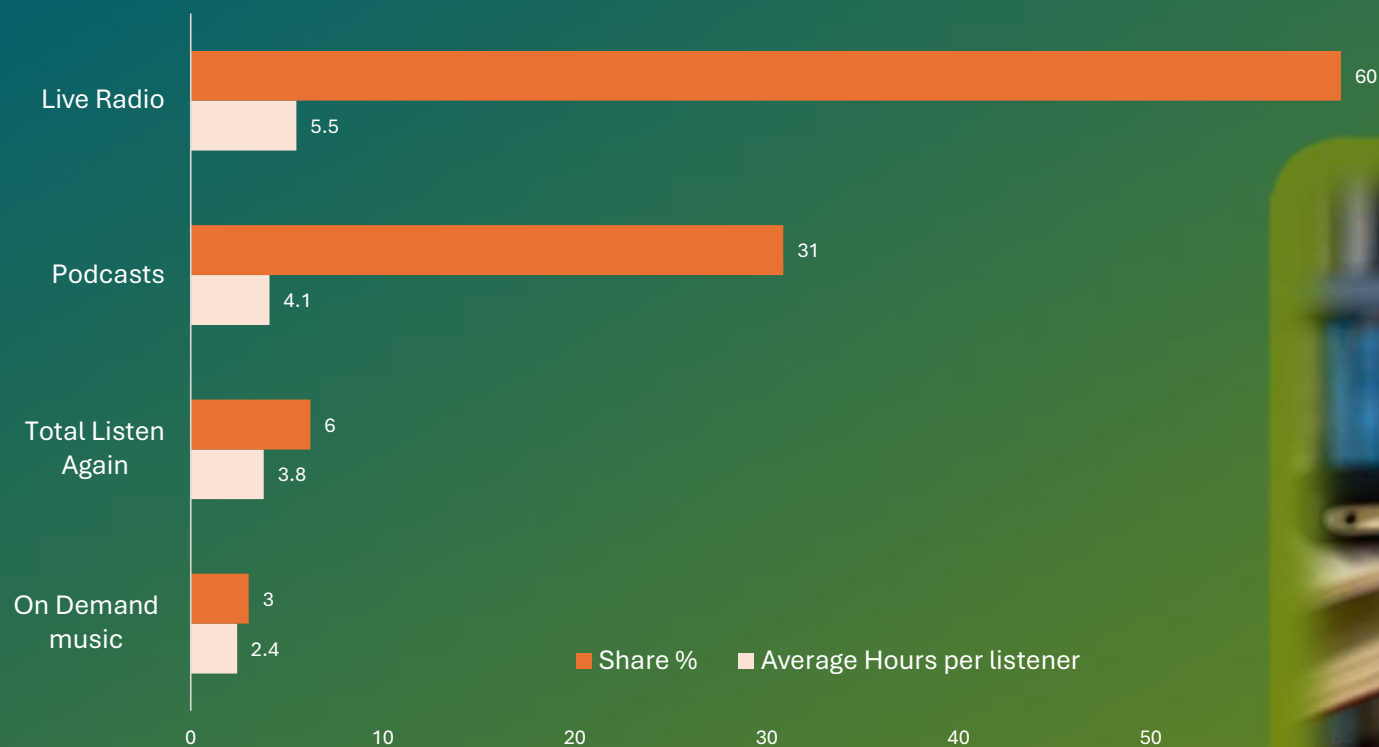
Some audio types serve similar purposes, like keeping us company, helping us relax or making us feel informed on what is going on in the world, but others serve more specific needs like providing a social soundtrack or assisting us to help engage in conversations.

Need State – Amplify My Mood



*Based on listeners that chose this need state.

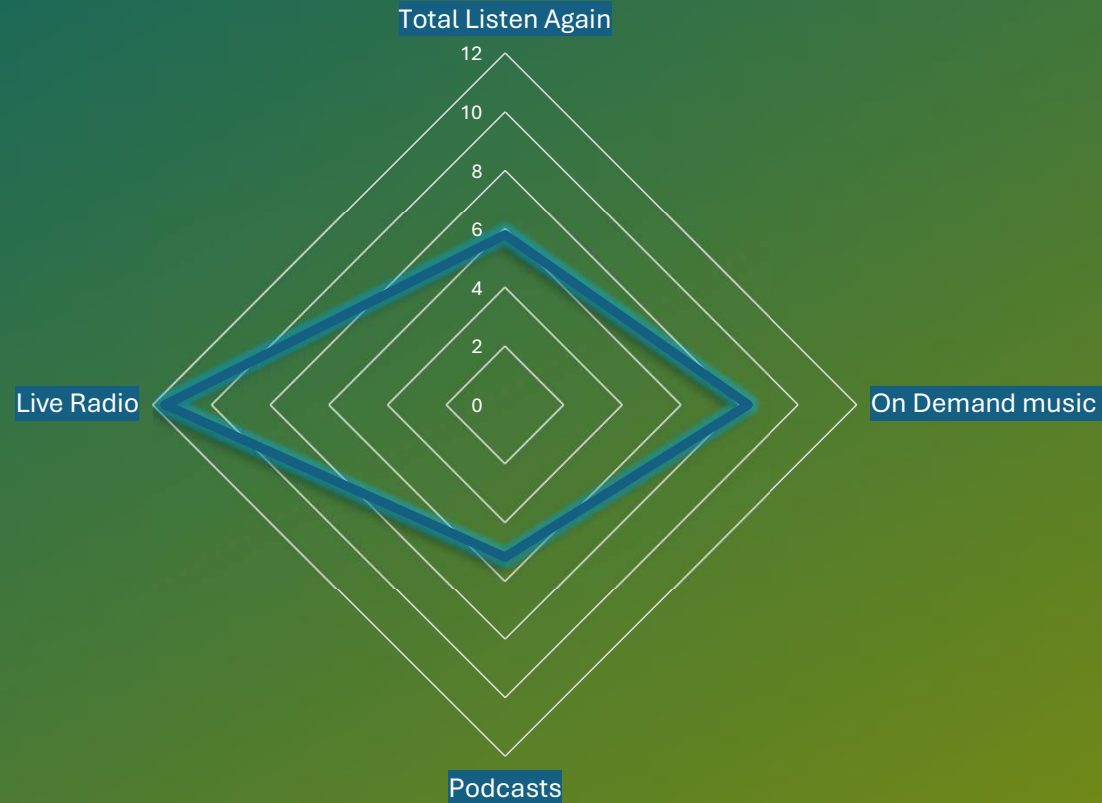
Need State – To feel informed



*Based on listeners that chose this need state.

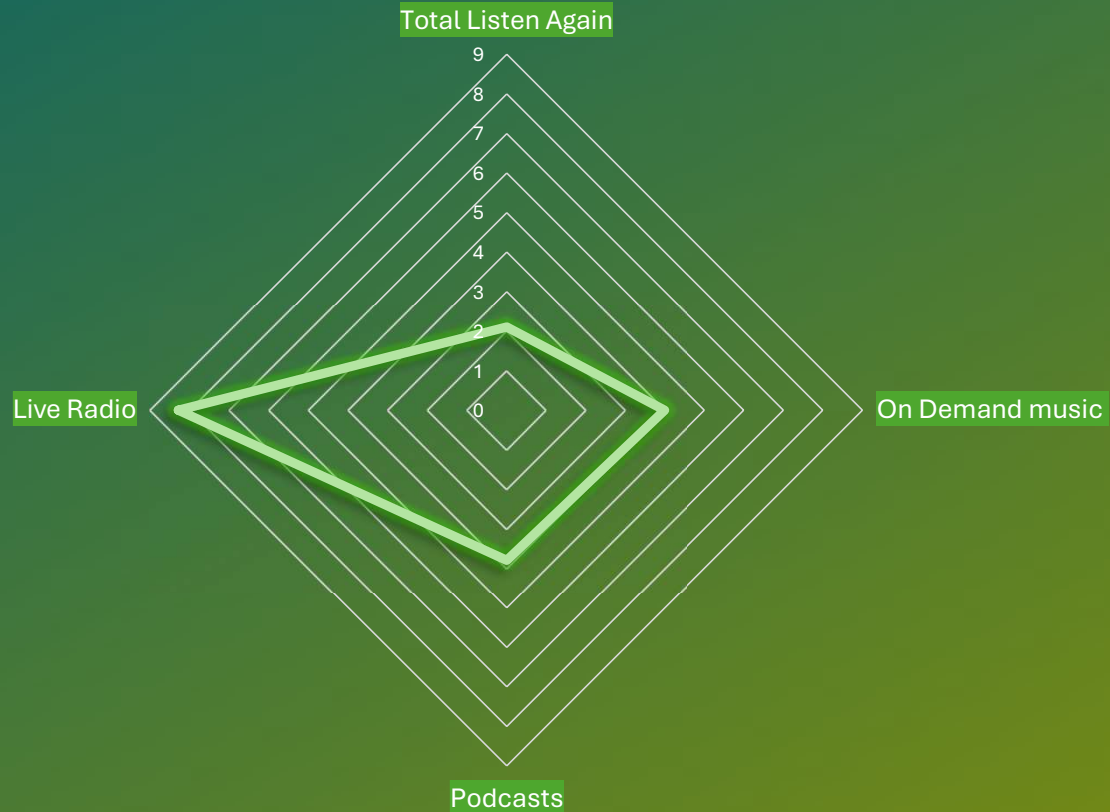
Need State – Keep me company

Average Hours Per Listener



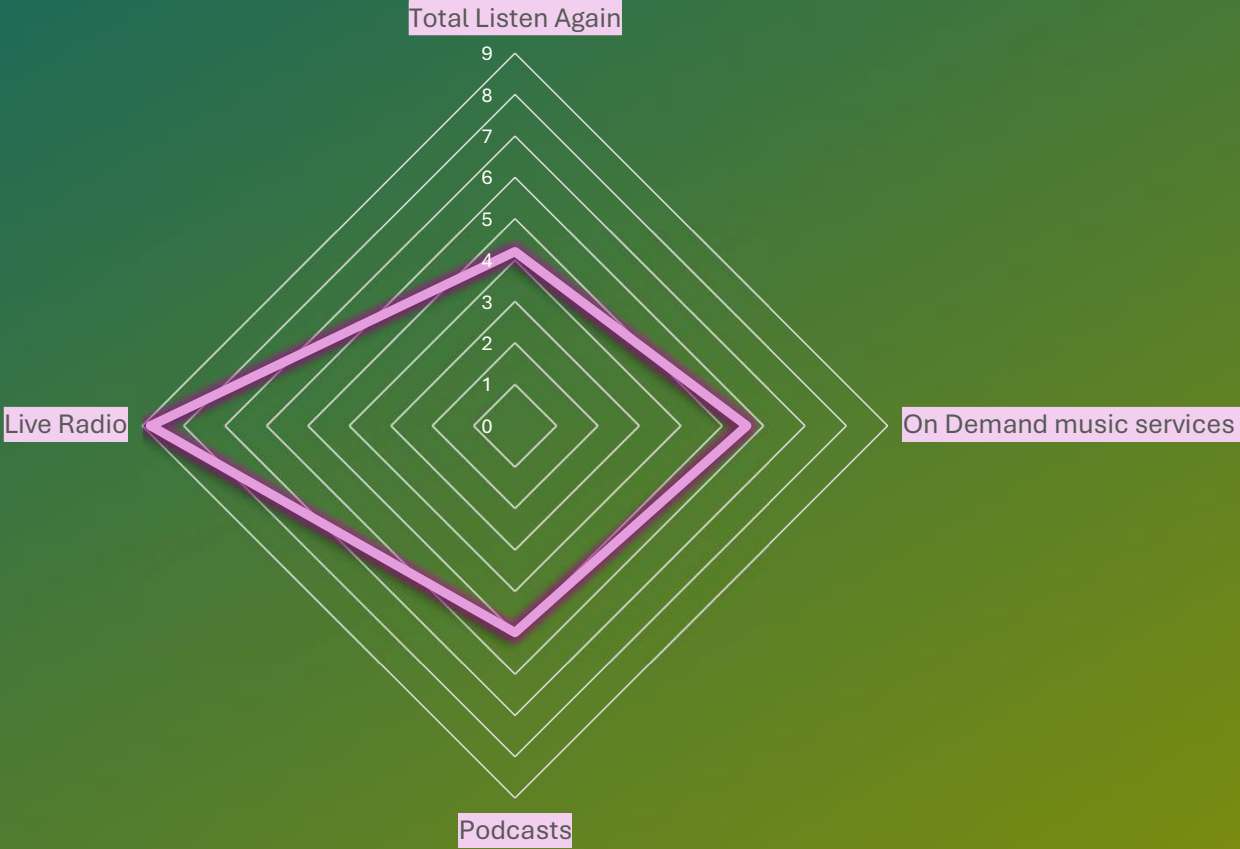
Need State – Keep me in the loop

Average Hours Per Listener



Need State – To provide a social Soundtrack

Average Hours Per Listener



*the response 'no reason' has been removed
* Based on listeners that chose this need state.

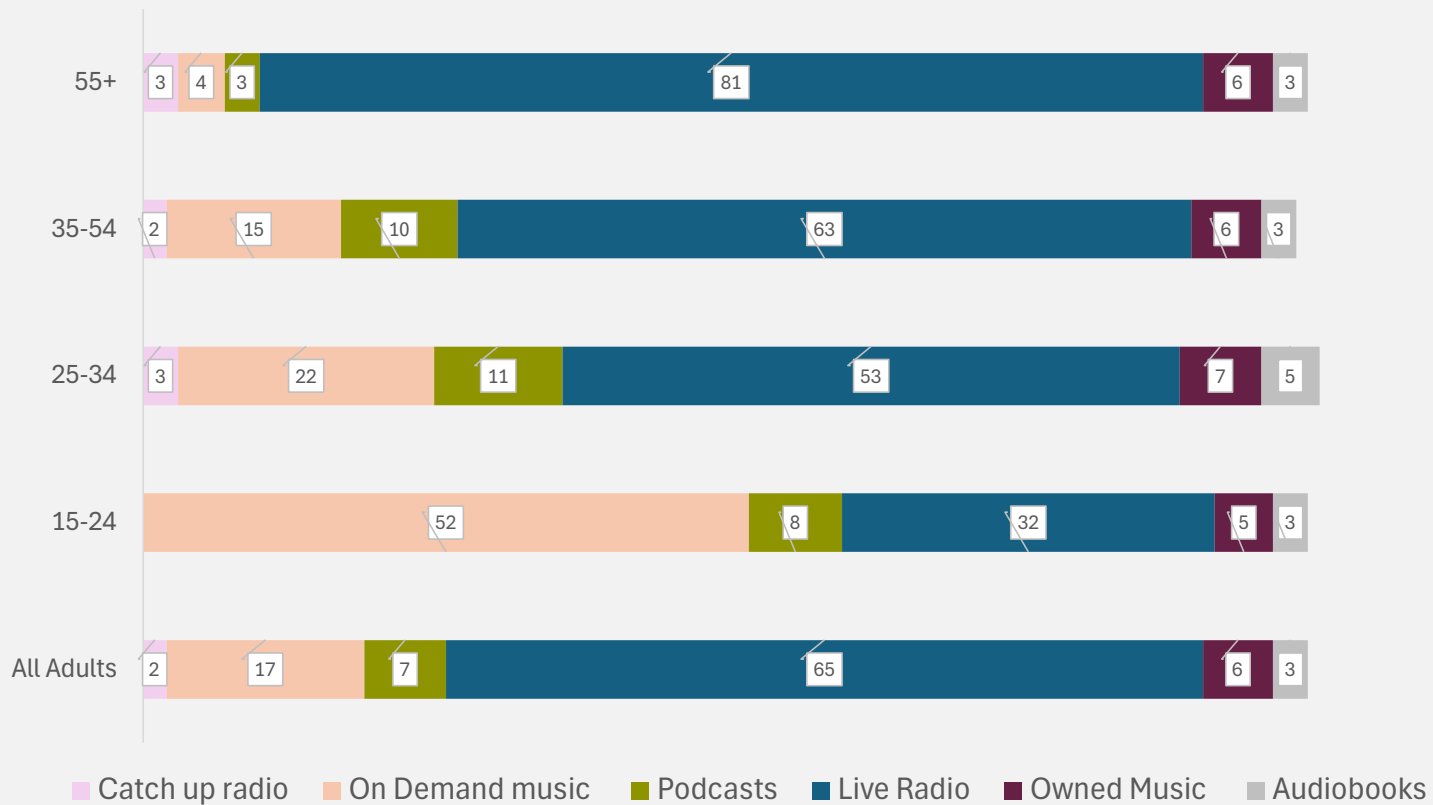
'Live Radio' dominates the time spent listening to Audio.

For all adults, the share of 'live radio' dominates audio listening (excluding visual) with 65% of their listening hours spent engaging in this audio type.

Music streaming (17%), podcasts (7%), owned music (6%), audiobooks (3%) and catch-up radio (2%) have smaller shares.



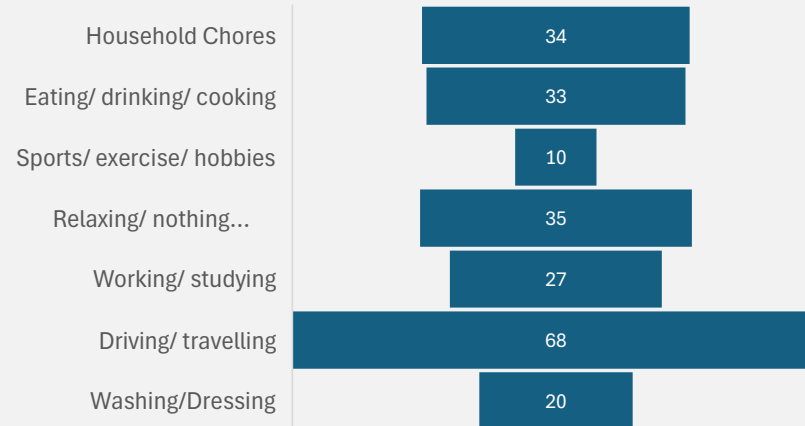
Share of Audio Listening by Age



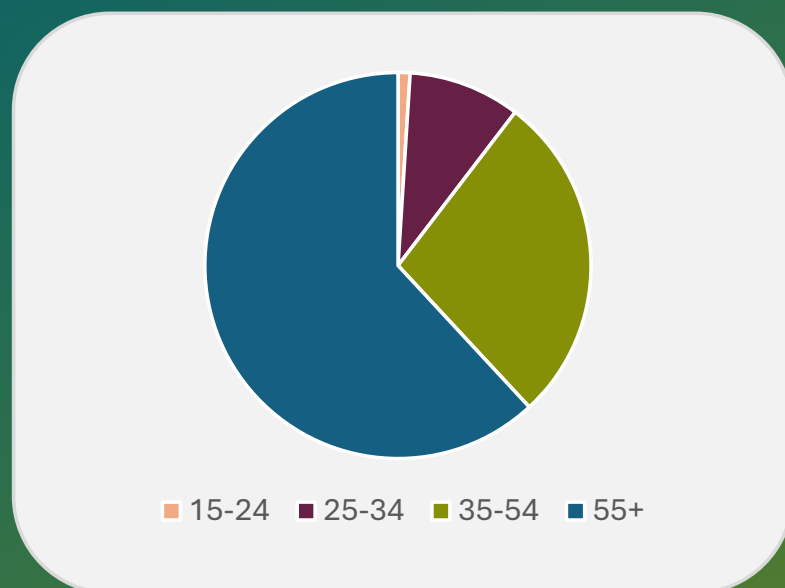
Live Radio is a perfect companion home or away.

Radio content provides the perfect company for many of our daily tasks and listening to live radio is often a shared experience, **45%** of the time listening is with others. People engage with several activities whilst listening to live radio, more than half of the listening hours are consumed whilst someone is driving/travelling, relaxing, working or studying. *Other devices include Tablets, Wifi Radios.

Weekly Reach% by Activity



10% of the UK Population go back and listen to their chosen radio content.



♂ 41% Male

♀ 59% Female

Catch up radio or has remained consistent with around 5.7 million or 10% of the population doing so in an average week. Going back to listen to a radio show or piece of content normally takes place in the home (71%) so activities such as 'doing nothing in particular' or 'working/studying' are the most cited by catch up users.

The profile of the Catch-Up Radio listener leans heavily toward 55plus.

They listen approximately 7 hours each week and do so alone (88% of the time). There are so many apps making curated content easy to access, therefore devices such as Smartphones(57% share of hours) and Computers(22%) are used most frequently, with some listening via Tablet too (14%).

On Demand Music is an anywhere, anytime accompaniment.

In terms of all adults, 37% of the population tune in to On Demand Music services each week, listening for an average of 13 hours per listener. 62% of On Demand Music service users claim to use a premium service with no ads. The share of listening by device is 58% Smartphone, 18% Smart speaker, 17% Computer; devices such as Tablets and TVs have a much smaller share.

It's still mostly listened to by ourselves (74%) and the location of listening is split between 57% in home v 43% out of home, however, there are nuances within listening behaviours among different age demographics.



Half of all On Demand Music listeners are under 35.



 43%
Male

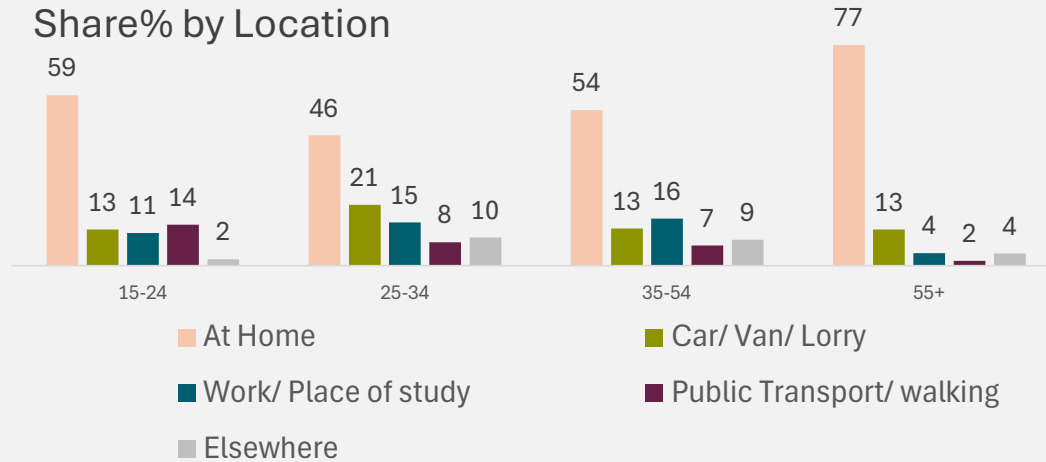
 57%
Female

The profile of the listener is typically young adults, 50% are under 35 years old, 25% are under 25. In this wave the profile leans towards female listeners. OMS reaches 63% of the 15-24 population and those listen for 23 hours in a week. 65% of the listening hours are via a Mobile Phone, 18% by Computer and 14% via a Smart Speaker.

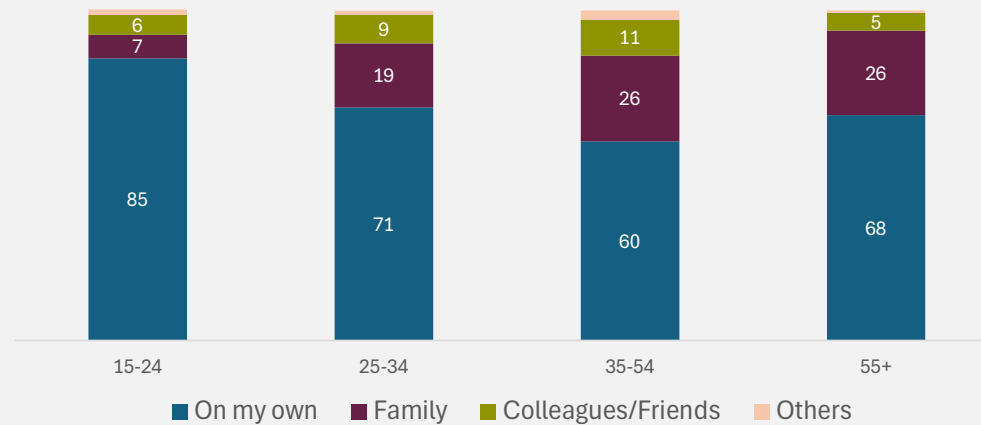
Younger listeners indulge in their favourite playlists and saved songs with others, making it more of a social experience. 36% of listening hours in this age group are consumed whilst working/studying or relaxing each week.

On Demand Music more social for over 25s.

Share% by Location



Share % by Who Listened with



Podcasts

26% of the UK population tune in to podcasts in an average week and those listen for around 8 hours per person. Podcasts are mainly a single person audience and not often a shared experience as 93% of listening hours are consumed alone. 1.13 billion hours are listened to in an average week in the Winter 2024 wave to Podcasts, this has increased by 54% since the Winter of 2020.

Over three quarters of podcast listeners are under 55 and its evenly split between genders in this wave 45% Male and 55% Female. Listening to a podcast allows the engagement in other activities whilst listening and is enjoyed at home as well as commuting, or in the workplace.

Podcasts are mainly consumed via apps on Smartphone (81%) but some listening does take place using computers (6%), tablets (7%) and smart speakers (3%).

Almost a quarter (22%) of young adults listen to Podcasts in an average week, this group listens for slightly longer than all adults, spending around 10 hours per week engaging in this medium (compared to 7 hours per listener in Winter 2020).

The Podcast Listener

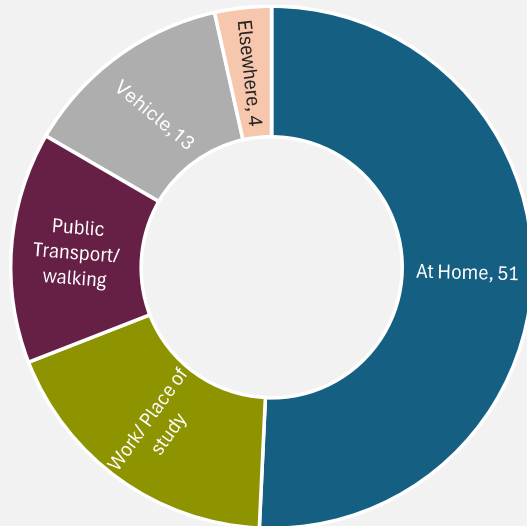


45%
Male



55%
Female

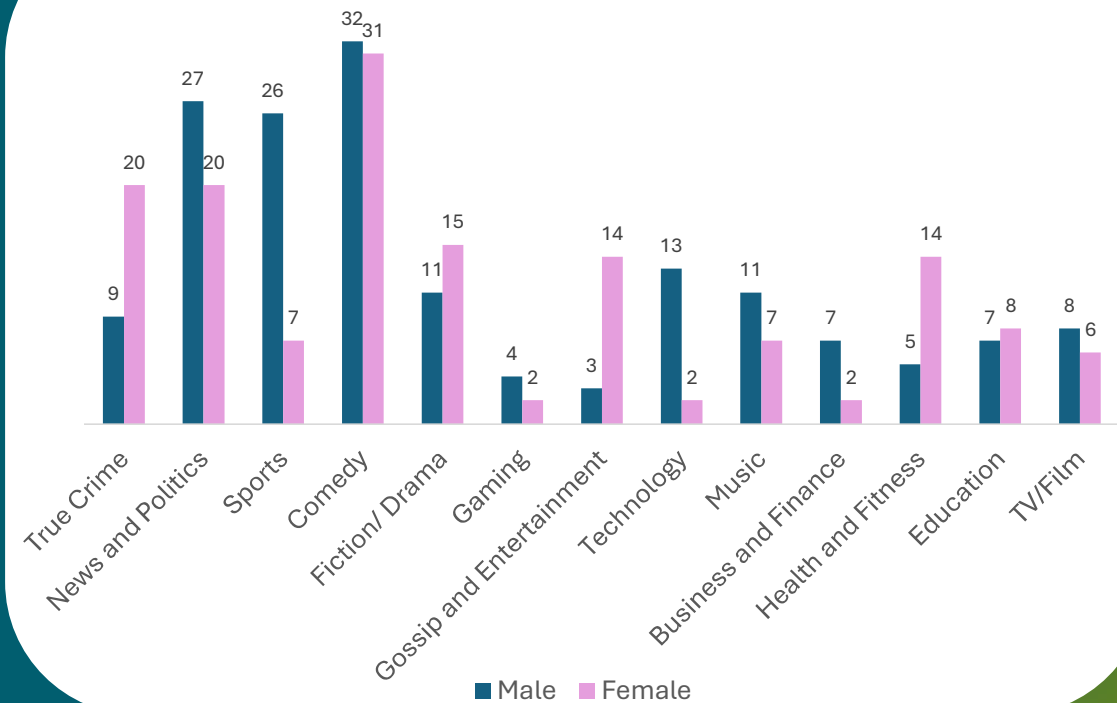
Share % by Location



Popular Podcast Genres



% *claimed genre listened to the most



*claimed podcast listeners (everyday, most days, once a week, once a month, less often) via questionnaire

Podcast listeners are highly engaged.

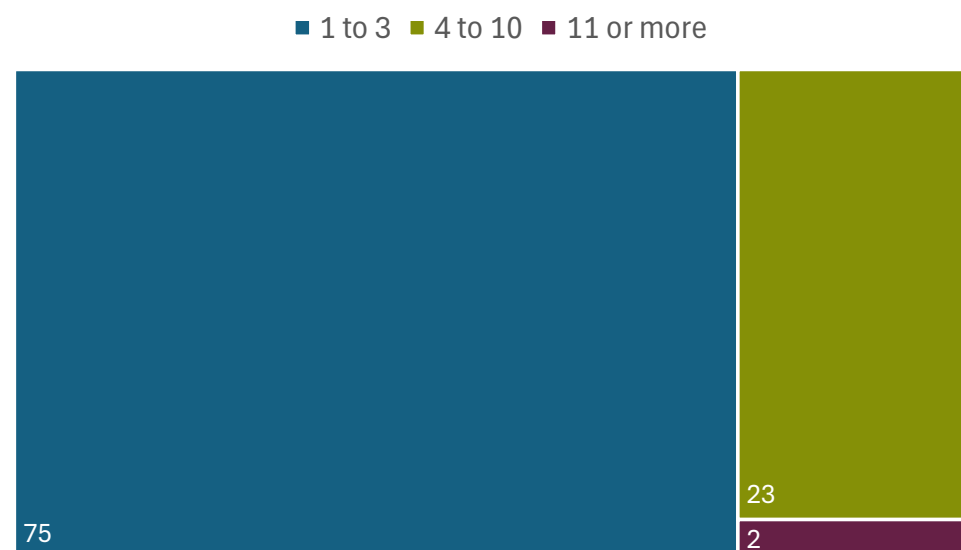
75% listen to 1-3 episodes, 23% listen to between 4 and 10 episodes and 2% listen to 11 episodes or more in an average week.

84% claim to listen to all or mostly all of each episode and 70% get around to listening to more than half of all the episodes they have downloaded.

13% claim to watch podcasts weekly.

Podcast listeners claim that their main sources of discovery for new titles are recommendations from friends, social media, podcast players or from radio.

% claimed number of weekly Podcast episodes listened to



Time of Day

Listening Peak

Live Radio 8-8.30am
 Podcasts 8-8.30am
 On Demand Music 1-1.30pm
 Catch Up Radio 11-11.30am

Monday – Friday Average Reach % of those who listen



MIDAS Winter 2024 fieldwork was carried out over two weeks in November/December 2024 with a final sample of 1668 former RAJAR respondents aged 15 plus who completed a 7-day online diary.

The data tables for this report are available to RAJAR subscribers, please contact Lyndsay Ferrigan to request. This information can be used publicly using the source: RAJAR/MIDAS Winter 2024. All the key metrics of the data are based on an average weekly basis. As per RAJAR, the most recent set of MIDAS should be used for any external purposes.

For Publication Enquiries contact;

Lyndsay Ferrigan

RAJAR Communications Manager

Email: Lyndsay@rajar.co.uk

Telephone Number: 020 7395 0636