

INTRODUCTION

MIDAS Summer 2016

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 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. It also reveals 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 (**AM/FM Share = 44%**, **DAB = 36%**). **Any TV has a 5% share.** Devices connected to the internet have a smaller share of listening hours (**Desktop/Laptop 6%**, **Smartphone 3%** and **Tablets 0.5%**)

APPS



Radio Apps are popular amongst radio listeners – **23.0 million** or **43%** of the UK population have downloaded a Radio App, including **5.2 million (64%)** of 15-24 year olds and **5.4 million (62%)** of 25-34 year olds. Over half (**54%**) of all users who download a Radio App use it on a weekly basis.

PODCASTING

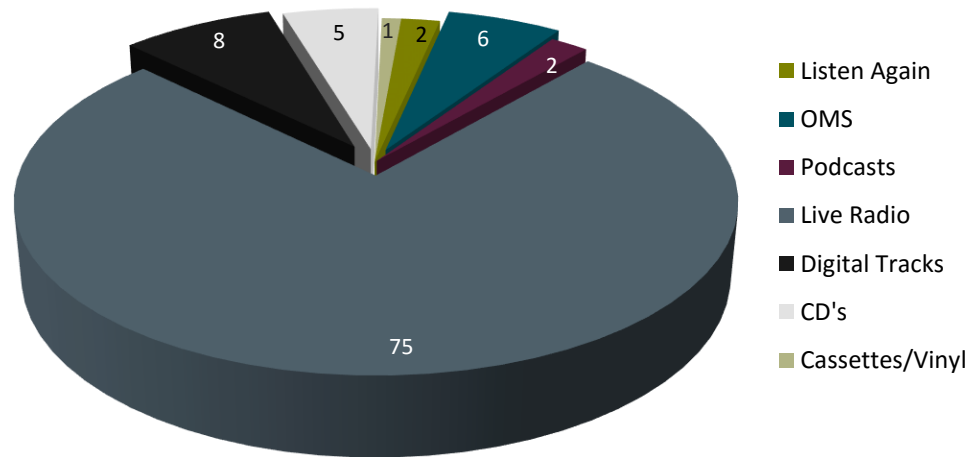
4.3 million adults use any Podcast, whether it be Speech or Music. The Smartphone is the most popular way to listen to a Podcast with a reach of **61%** (Adults 15+ who listened to a podcast). Almost two thirds of all Podcasts downloaded are listened to (**65%**).

LISTEN AGAIN

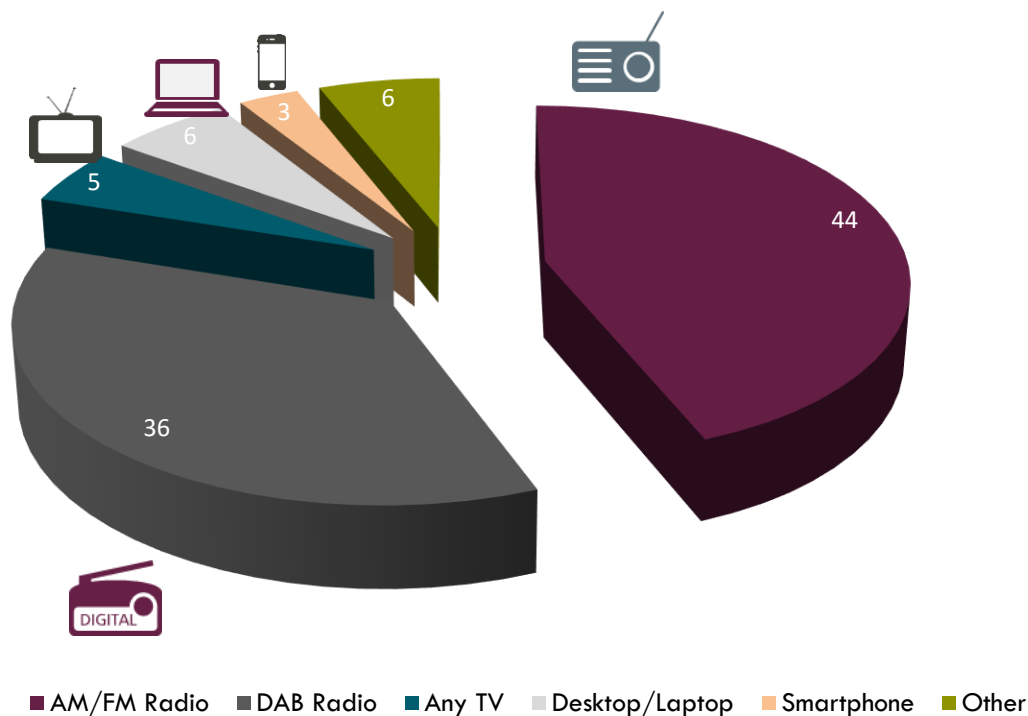


4.9 million adults use the 'listen again' or 'catch up' radio function. Desktops/Laptops are the device of choice with **49% share** of all 'listen again' listening hours. **71%** of all 'listen again' hours are listened to in Home. **86%** of Listen Again/Catch Up Radio hours are listened to alone.

AUDIO SHARE OF EAR % (excluding visual)



LIVE RADIO Listening by Device (Share %)



When it comes to listening to Live Radio, the traditional AM/FM radio has the highest 'share' of listening with **44%**.

Listening via a DAB set has the second highest share of listening hours with **36%**.

Listening via TV **5%**, Laptop/Desktop **6%** and Smartphone **3%**.

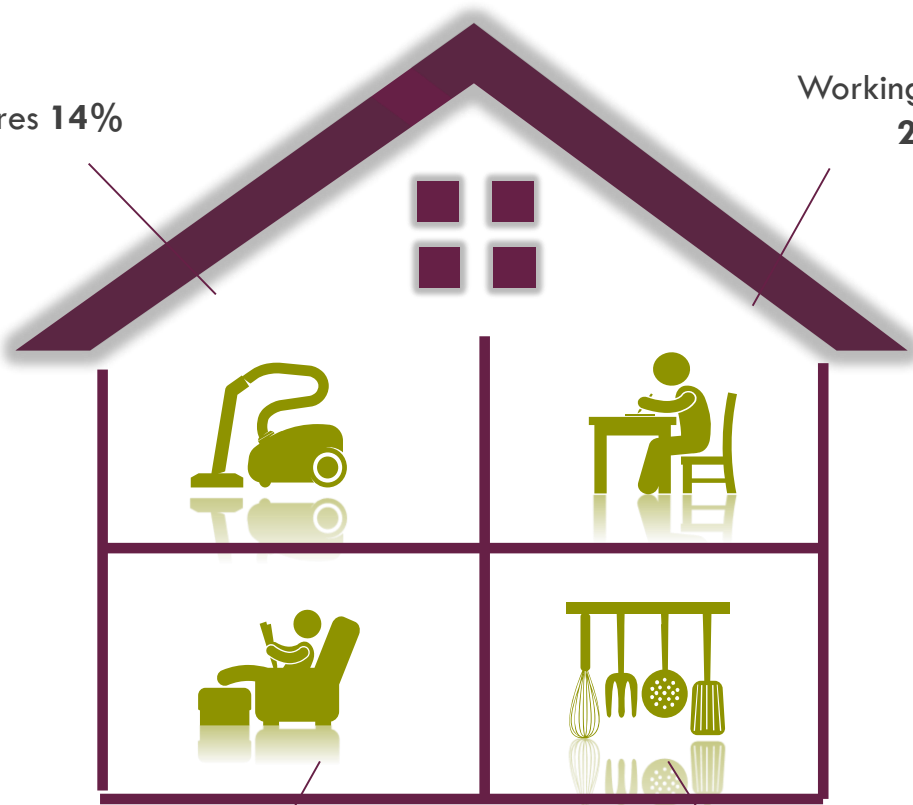
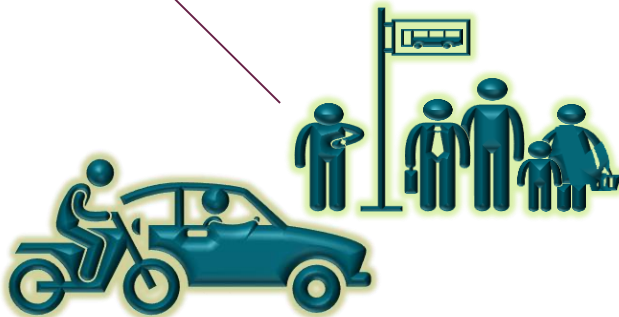
"Other" devices include Tablets, Digital Music players and Wi-Fi Radios. This is based on the All Adults 15+ sample.

LIVE RADIO Listening by Activities (Share%) All Adults

Household Chores **14%**

Working/Studying **21%**

19% of live radio hours are listened to whilst the listener is travelling somewhere...

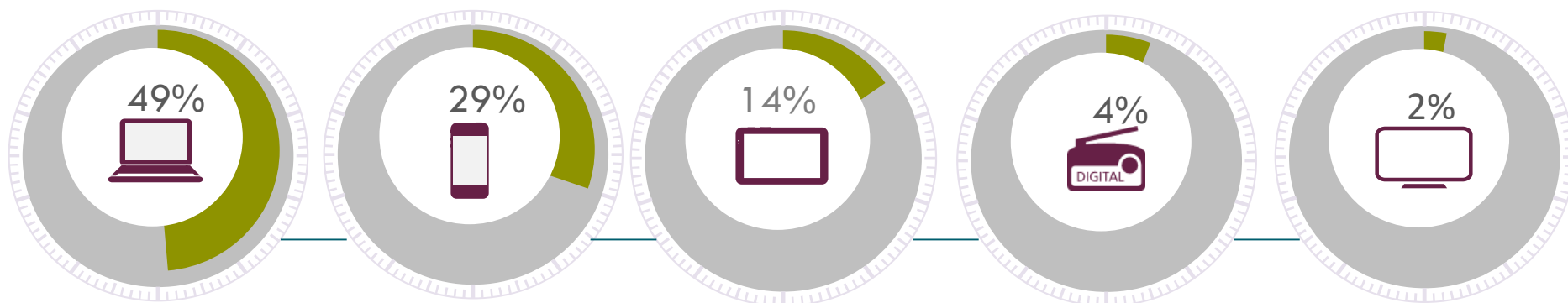


Relaxing/Doing nothing **14%**

Eating/Cooking **9%**



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

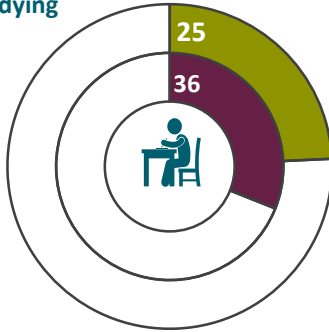


A Laptop or Desktop computer is the most favoured device to listen to 'Listen Again' or 'Catch Up' radio, with almost half of listening hours (49% share). Smartphones have a share of **29%**, Tablets 14%, DAB Radio Sets(**4%**) and Any TV set (**2%**)

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

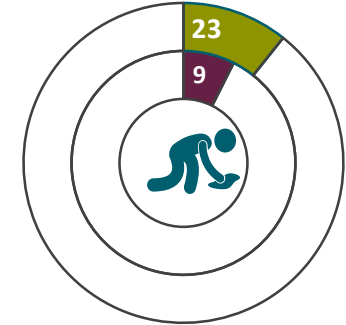
Working/Studying

■ Reach%
■ Share%



Household Chores

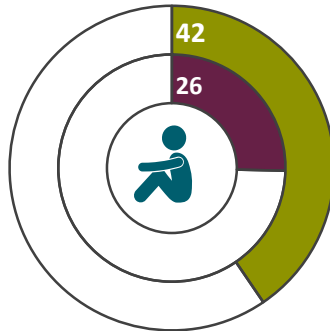
■ Reach%
■ Share%



Relaxing and Working/Studying are the most popular activities whilst engaging in 'Listen Again' services with the highest Reach and Share of Hours.

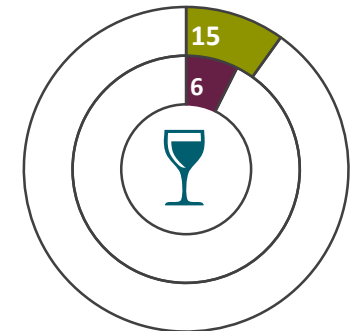
Relaxing

■ Reach%
■ Share%



Eating/Drinking/Cooking

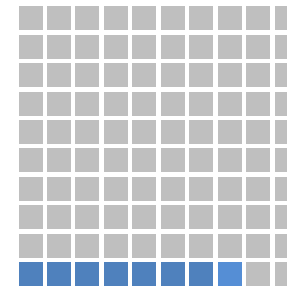
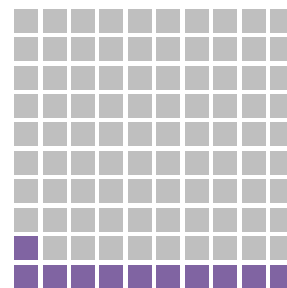
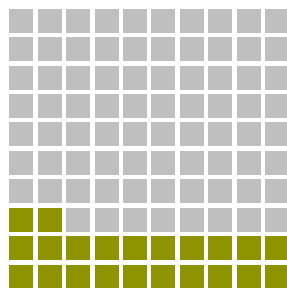
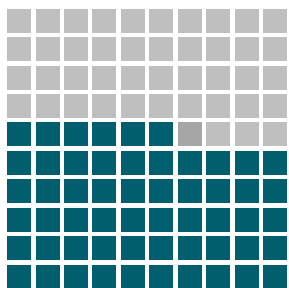
■ Reach%
■ Share%



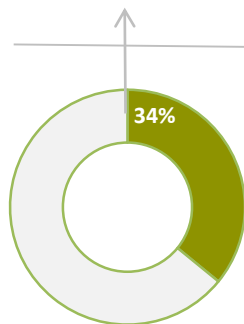
PODCASTS by Device (Share %)



Listening to a Podcast is an activity normally undertaken alone so naturally we see connected mobile devices being used more frequently - Smartphones have a **56%** share of Podcast listening hours, while Laptops/Desktops have a share of **22%**, Digital Music players **11%** and Tablets **8%**.

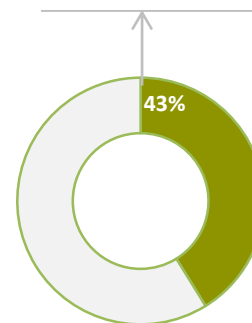
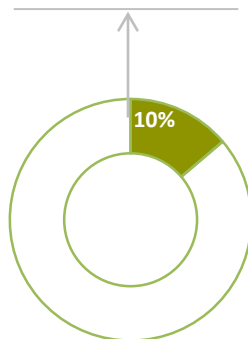


PODCASTS by Activity (Reach%)



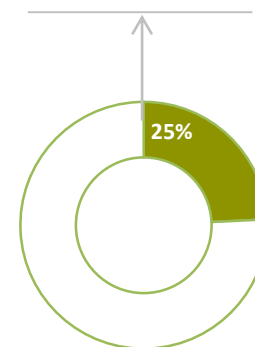
Relaxing or Doing Nothing in Particular has a reach of **34%**

Engaging in Sports, Exercise or Hobbies has a reach of **10%**



Driving or Travelling has a reach of **43%**

Working or Studying has a reach of **25%**



Listener Profiles

'Listen Again' services
favour listeners aged
35-54.

69%
of Podcasting
hours are
listened to by
Males.

51%
of Live Radio
listening hours are
done alone.

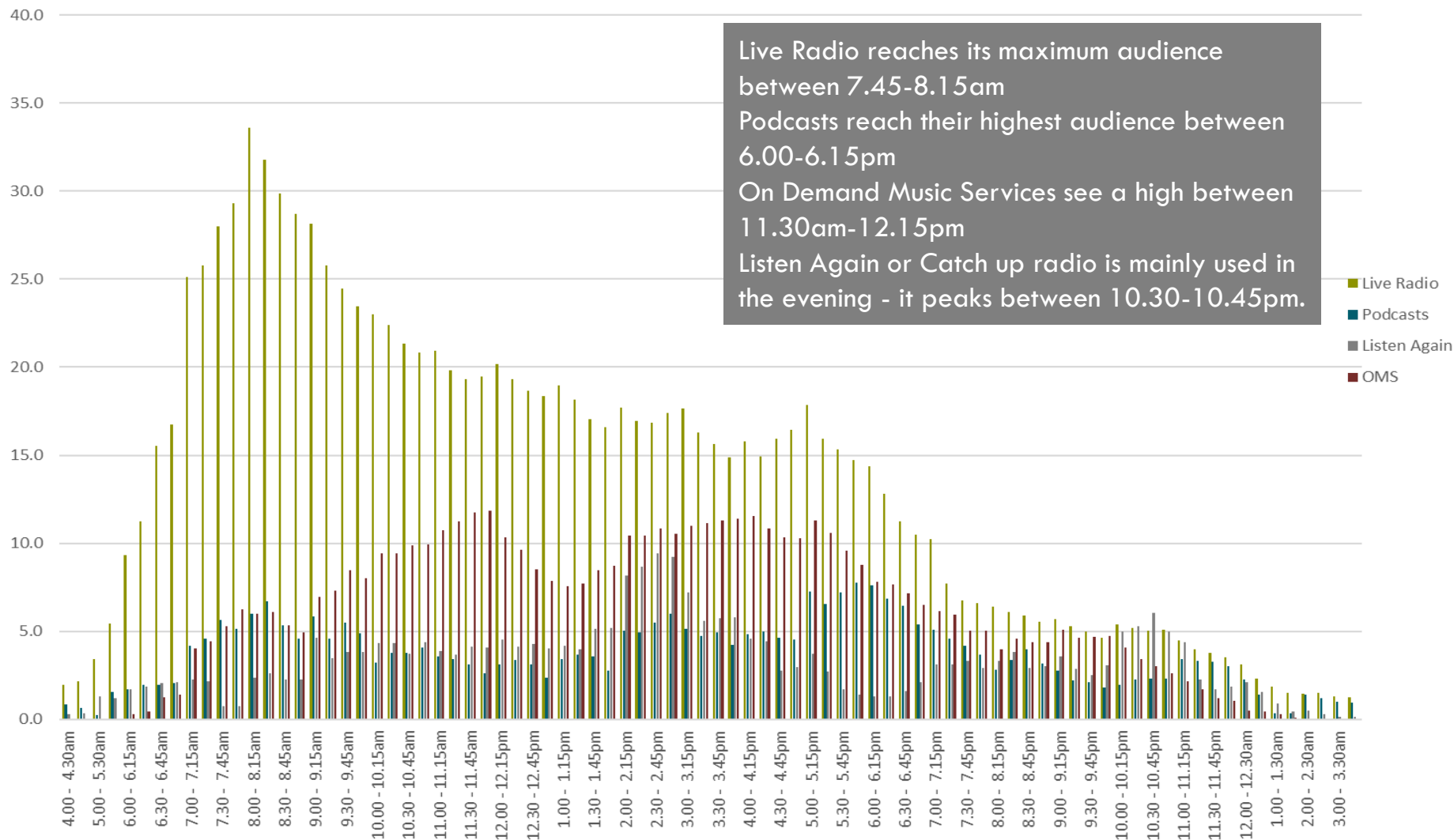
54%
of those who
downloaded a
radio app use it
at least once per
week

12.3 million
People have ever
used Radioplayer



Time of Day Listening takes place – MONDAY to FRIDAY average

MIDAS Summer 2016



Live Radio reaches its maximum audience between 7.45-8.15am
 Podcasts reach their highest audience between 6.00-6.15pm
 On Demand Music Services see a high between 11.30am-12.15pm
 Listen Again or Catch up radio is mainly used in the evening - it peaks between 10.30-10.45pm.

- Live Radio
- Podcasts
- Listen Again
- OMS



Sample comprised of 2045 re-contacted respondents from the main RAJAR Survey

Fieldwork was conducted during June 2016

For Publication Enquiries contact;

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

For more information:

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