Audio Time

What the RAJAR Midas Audio survey tells us about listening in the digital age
The audio landscape has been undergoing continual change at the hands of new technology since the early days of recorded music and the very first radio services. The speed and extent of change has been accelerating of late as a consequence of digital technology.

The combination of new devices and delivery systems have liberated audio, presenting audiences with an unprecedented range of content and services that can now be accessed in more places at more times and in more ways to fit conveniently into our lives. Every part of the audio spectrum is evolving and adapting.

Radio now lives well beyond the radio set, its unique audience proposition has been transformed with new brands and services, distributed through analogue, online and DAB. The additional utility of Apps and media players such as Radioplayer and BBC iPlayer Radio have made accessing radio content more flexible and easy. Further technological advances combining both DAB and IP will continue this journey into an exciting hybrid future.

Music can now be acquired and accessed more easily. On-demand music services are transforming the music industry, whilst audio sharing platforms are making audio content more searchable and social.

Although niche, podcasts are developing into a new audio channel introducing new content as well as providing an important ‘taster’ and entry point for ongoing radio and non-radio audio services. This all caters to the evolving need states of the audience at any given time.

With audio’s ability to free both the eyes and hands, the outlook for audio listening is positive.

‘Audio Time’ draws upon RAJAR’s Midas Audio Survey which measures listening time and behaviour across the spectrum of audio led content, devices and services. It encompasses:

- Digital tracks [e.g. downloaded MP3s]
- On-demand music services like Spotify
- Live radio (across all platforms)
- Catch Up radio (or listen again)
- Podcasts (music and spoken)
- Online music videos like YouTube
- CDs
- Vinyl or cassette tapes
Soundbites

- We spend nearly 26 hours each week with audio content.

- Live radio accounts for 74% of the share of all UK audio consumption. It reaches 90% of the population – over 48 million adults - on a weekly basis. Radio remains very much a live medium, with catch up services contributing 1.5% to weekly radio listening.

- 38% of audio listening is on devices other than radio sets, primarily PC/laptop (11% of all audio) and smartphones (8%).

- On-demand music services account for 6% share of audio time and are listened to by 7.6 million people each week.

- 15–24s in particular are moving from a culture of owning music (CDs and MP3s) to accessing music, and already spend more time on streaming audio and music video services than with digital tracks or CDs.

- 21% of the population access online music videos on sites like YouTube, rising to almost a half of 15–24s. By volume however they account for 4% of weekly share of audio time.

- Podcasts are niche – 7% listen in an average week, making up 2% share of audio time. Listeners to podcasts spend over 6 hours a week with them with 91% of their listening being to speech-based content.

- WiFi is the most common means of radio access via smartphones, as concerns remain around the effect of audio streaming on 3G and 4G data plans. As a result digital tracks remain disproportionately popular on smartphones, even for younger users.

- Smartphones and PC/laptops are clearly preferred to tablets for audio. Tablets account for just 2% of weekly audio time. However tablets fare relatively better for catch up radio and on-demand music services account for the highest volume of listening on tablets.

- On-demand music services now account for more audio time on PCs and laptops than digital tracks or online music videos.

- Live radio accounts for 84% of all in-car listening, compared to 12% for On-demand music services.

Share of Audio by listening type

<table>
<thead>
<tr>
<th>Share of Audio time (%)</th>
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</thead>
<tbody>
<tr>
<td>On-demand Music services</td>
</tr>
<tr>
<td>Podcasts</td>
</tr>
<tr>
<td>Online music videos</td>
</tr>
<tr>
<td>Digital tracks</td>
</tr>
<tr>
<td>CDs</td>
</tr>
<tr>
<td>Cassette / vinyl</td>
</tr>
<tr>
<td>Live radio</td>
</tr>
<tr>
<td>Catch up radio</td>
</tr>
</tbody>
</table>

Weekly reach of audio ( %)

<table>
<thead>
<tr>
<th>Live radio 90.0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catch up radio 8.0</td>
</tr>
<tr>
<td>On-demand music services 14.2</td>
</tr>
<tr>
<td>Podcasts 6.9</td>
</tr>
<tr>
<td>Online music video 21.3</td>
</tr>
<tr>
<td>Digital tracks 27.2</td>
</tr>
<tr>
<td>CDs 30.5</td>
</tr>
<tr>
<td>Cassette/Vinyl 3.3</td>
</tr>
</tbody>
</table>

Base: All 15+ (3260) Source: RAJAR Indies: Audio Survey Autumn 2015
Live radio reaches 90% of the population across the week, 48.3 million adults. Although the volume of listening to catch up radio and podcasts is relatively low, nonetheless 8% and 7% respectively use this type of audio at least once a week.

CDs still have twice the weekly reach of on-demand music services, and narrowly beat digital tracks. However clearly the tide is flowing against physical media for audio; amongst 15-24s, the weekly reach of radio is very similar to the total population, but there is a clear preference for online forms of audio – the most widely used being online music video on sites like YouTube. A third of 15-24s listen to on-demand music services, but this still lags behind the usage of digital tracks.

15-24s are less likely to use listen again radio services, but more likely to listen to podcasts and are actually exposed to more audio than the total population – 275 hours across the week. Whilst they still have live radio as their single largest audio category, they complement it primarily with three other digital sources – streaming services, digital tracks and online music videos.

Younger adults now devote more time to streaming media – music they don’t ‘own’ – than to their own digital tracks or downloads. They clearly are moving from an era of ownership of media into one of access. This is reflected in the video world in the rise of VOD services like Netflix at the expense of DVD and Blu-ray. It amplifies why artists’ royalties for streaming versus physical media is such a huge issue at the moment (see box out on page 10). It also explains why the music charts moved to incorporate audio streaming into their calculations.

We can also look at the volume of listening amongst those who actually use each service. On-demand music service listeners listen for 10 hours each week, this compares to 21 hours for radio listeners.

**Weekly hours by those using each service**

**Live radio**

21.2

**On-demand**

10.1

**Digital tracks**

7.7

**Podcasts**

6.1

**CDs**

3.7

**Cassette/ vinyl**

3.4

**Catch Up Radio**

4.0

**Online music videos**

4.3

**REACH**

Base: all using service Source: RAJAR Midas Audio Survey Autumn 2015

**Share of Audio by device**

**PCs & Laptops (%)**

- Podcasts: 2.5
- Online music video: 18.0
- Digital tracks: 17.2
- CDs: 3.1
- Live radio: 29.1
- Catch up radio: 4.5
- On-demand music services: 25.6

**Smartphones (%)**

- Podcasts: 12.6
- Online music video: 8.1
- Digital tracks: 30.4
- Live radio: 21.9
- Catch up radio: 2.6
- On-demand music services: 24.4

**Tablets (%)**

- Podcasts: 6.9
- Online music video: 14.1
- Digital tracks: 17.2
- Live radio: 17.6
- Catch up radio: 14.2
- On-demand music services: 30.0

Base: all using each device Source: RAJAR Midas Audio Survey Autumn 2015

On PCs and laptops, live radio has the highest volume of listening, but on-demand music services run radio pretty close, now accounting for more audio time than digital tracks or online music videos:

On smartphones it’s digital tracks that are most widely used, even for 15-24s. This will reflect connectivity issues plus concerns over data plans and charges for streaming. On-demand music services now lead live radio in terms of smartphone share of audio. However combined with catch up radio, content from radio is currently at a similar level to that from on-demand services:

Whilst nearly two thirds of UK homes have access to a tablet, tablet usage for audio is more limited, accounting for just 2% of all audio compared to 11% for PC/laptops and 8% for smartphones. However tablets are far less likely to be used out of the home, so connectivity issues are less of a factor than for smartphones. As a result, on-demand music services are actually the most common form of audio by volume, accounting for 30%, significantly more than for live radio and digital tracks.
Up until relatively recently, free to air audio had incredibly limited distribution. Pre-1999 there was no broadband, no digital radio, no mobile data – indeed not many mobile phones!

Since then there’s been an explosion in distribution opportunities and a significant lowering of barriers to entry in getting audio content to large numbers of listeners.

As the Daddy of audio, radio’s had a big part to play in defining the types of audio that are now seeing further independent success, as well as helping to popularise many of these diverse platforms. Radio has also got its own significant stake in audio’s multi-platform future.

The combination of iPods, XM and the wide adoption of iTunes helped podcasting break through in the early 00s (see page 12). As podcasting matured, so did HTML5, cloud-computing and the availability of always-on bandwidth. Soundcloud, Audiostream and Spotify could now easily deliver audio (whether subscription copyrighted music or free to hear material) over the web to desktop and mobile. Whether short-form audio or streamed radio-like experiences, the scale and breadth of audio has never been wider.

Radio itself has always made a decent job of seizing the opportunities presented by new technology and responding to changing listener behaviour. New BBC stations for pop music were prompted by the sea-based pirates. Radio has been added to cars, the walkman, TV sets and mobile phones. Radio has built its own platform for more radio content with DAB digital radio. Spurred on by how competition traditional radio has always developed and changed.

The success of new audio types and more space for stations has led to an explosive period for broadcast radio. The existing portfolio of national stations has expanded with stations such as Heart Xtra and Smooth Xtra. The launch this spring of the second national multiplex has seen 17 new radio stations covering content across speech, children, Asian and Christian genres. Old favourites have returned like Talk Radio and Virgin Radio and new sister stations from popular brands - Kiss100, talkSPORT2 and Mellow Magic - all appeal on the dial. The addition of DAB+ alongside mini multiplexes for small areas like Talk Radio and Virgin Radio and new sister stations from popular brands.

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On-demand music services are disrupting the traditional distribution model for music and redefining how personal music can be accessed and consumed. Directly-accessed music (whether physical media, digitised or streamed) and music delivered through radio have always offered quite different things. As a result, the continuing appeal of music-based radio overlaid with the ease of access of new streaming services is contributing to an increase in total audio time spent listening.

In an average week 76 million of us access an on-demand music service, which compares to 48.2million listening to live radio. On-demand music services account for 6% of all hours in the audio category – 14 hours per week. However this triples to 4.5 hours for 15-24s – 16% of all their audio. These services also have a greater appeal to males than to females.

51% of time spent with on-demand music services is to a service that features advertising. Ad-free subscribers listen for an average of 10.5 hours per week, compared to 2.5 hours for those using services with advertising.

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In Pod We Trust

Podcasts

Interest in podcasting has seen a resurgence in recent years – there were 60,000 active podcasts available on iTunes in 2015, up by 13,000 on the preceding year.

In the UK 21% of the population have ever downloaded podcasts, but podcasts account for just 0.4 hours of weekly audio time per head, because only 7% listen in an average week. However those who do listen in an average week consume an impressive 6.1 hours per week.

Speech-based content dominates, accounting for 91% of all time spent listening.

The weekly reach of podcasts skews towards the younger bands with males slightly more likely to listen than females.

Podcast listeners are loyal: Amongst podcast downloaders, 62% say that they play back all or most of their downloads. Having started listening, 57% go on to listen to the whole episode, 85% all or most of it.

69% of us listen to audio in a vehicle at some point during the week. On-demand music services are significantly less likely to be listened to in vehicles. In-car radio makes up 21% of all live radio listening, but only 4% of listening to on-demand music services happens in cars.

On-demand music tends to accompany five specific activities: work & study, driving & travel, household chores, relaxing and food & drink. On-demand music services have a much higher proportion of time accompanying work & study – this may reflect its younger skew in usage – perhaps towards students. Relaxing is the second most common activity for on-demand listeners. Socialising and using the internet also feature more prominently than for live radio.

Half of all listening to live radio happens when people are on their own, with the majority of accompanied listening being with partners, children and family members. However nearly two-thirds of on-demand music service listening is done by people on their own.

On-demand music is more likely than live radio to be listened to with friends, perhaps reflecting on-demand’s higher opportunity for control: music curation and mood setting for example.

Podcast listening Weekly reach

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-24</td>
<td>11.1%</td>
<td>9.4%</td>
</tr>
<tr>
<td>25-34</td>
<td>11.2%</td>
<td>9.5%</td>
</tr>
<tr>
<td>35-54</td>
<td>8.4%</td>
<td>6.9%</td>
</tr>
<tr>
<td>55+</td>
<td>1.9%</td>
<td>4.6%</td>
</tr>
<tr>
<td>Male</td>
<td>8.5%</td>
<td>5.4%</td>
</tr>
</tbody>
</table>

* Podcasts Create Golden Age of Radio – Janan Ganesh, FT.com

Location of listening

Share of listening by location - All 15+ (%)

<table>
<thead>
<tr>
<th>Location</th>
<th>All Audio</th>
<th>Live Radio</th>
<th>On-demand music service</th>
</tr>
</thead>
<tbody>
<tr>
<td>At home</td>
<td>57.3</td>
<td>41.5</td>
<td>32.1</td>
</tr>
<tr>
<td>Work / elsewhere</td>
<td>5.6</td>
<td>10.9</td>
<td>19.4</td>
</tr>
<tr>
<td>Car / van / lorry</td>
<td>19.4</td>
<td>21.2</td>
<td>21.1</td>
</tr>
<tr>
<td>Public transport / walking</td>
<td>19.6</td>
<td>21.1</td>
<td>21.6</td>
</tr>
</tbody>
</table>

Base: All 15+ (2326) Source: RAJAR Midas Audio Survey Autumn 2015

Share of In Car Audio Listening (%)

- On-demand music services 1.2
- Podcasts 1.7
- Digital tracks 6.3
- CDs 7.6
- Live radio 83.9

Base: All listener in car in week (6565)
Source: RAJAR Midas Audio Survey Autumn 2015

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RAJAR is responsible for providing the audience measurement service for the UK’s radio industry. It operates two surveys, the RAJAR national listening survey producing the audience figures for over 300 BBC and Commercial radio stations, and also the RAJAR Midas Audio Survey, measuring listening across the wider spectrum of audio led services.

RAJAR is a Joint Industry Currency. The industry created JIC’s to provide audience numbers and trading metrics for each advertising medium. They are owned and developed by the communications industry. Advertisers, agencies and media owners work in concert to deliver one, credible and objective trading currency for each medium.

As well as creating the standard metrics that serve as the bedrock for evaluating and trading advertising media, the Joint Industry Currencies also provide critical inputs that enable advertisers and their agencies to understand the effectiveness of cross-media marketing campaigns.

How they are built and how they work is open to scrutiny – they are transparent in what they do. The currencies are the most robust and comprehensive datasets available. Each is produced and ordered at cost, delivering unrivalled value for money.

The UK Joint Industry Currencies are ABC, BARB, JICPOPS, JICREG, JICWEBS, PAMCO, RAJAR and ROUTE.

About RAJAR

The survey is conducted quarterly and the data here comes from the Autumn 2015 survey.

That survey took in a large sample of 2526 UK adults aged 15+. They were a representative sample of adults who had recently taken part in the main RAJAR study and they completed two tasks – they kept an online diary of their audio consumption, for quarter hour periods across a full week. They also completed a questionnaire that provided a wider understanding of the device and service usage that shaped the listening in the diary.

Fieldwork was carried out in November 2015 and the results were weighted to the total UK population, using modelling to project the proportion of the population that does not have broadband access.

So that’s our overview of the latest RAJAR Midas Audio findings. For more information contact Lyndsay Ferrigan (Lyndsay@rajar.co.uk)