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Part of Adwanted Group

The Growing UK Audio Landscape_

Brought to you by Mediatel Connected's Consumer Surveys

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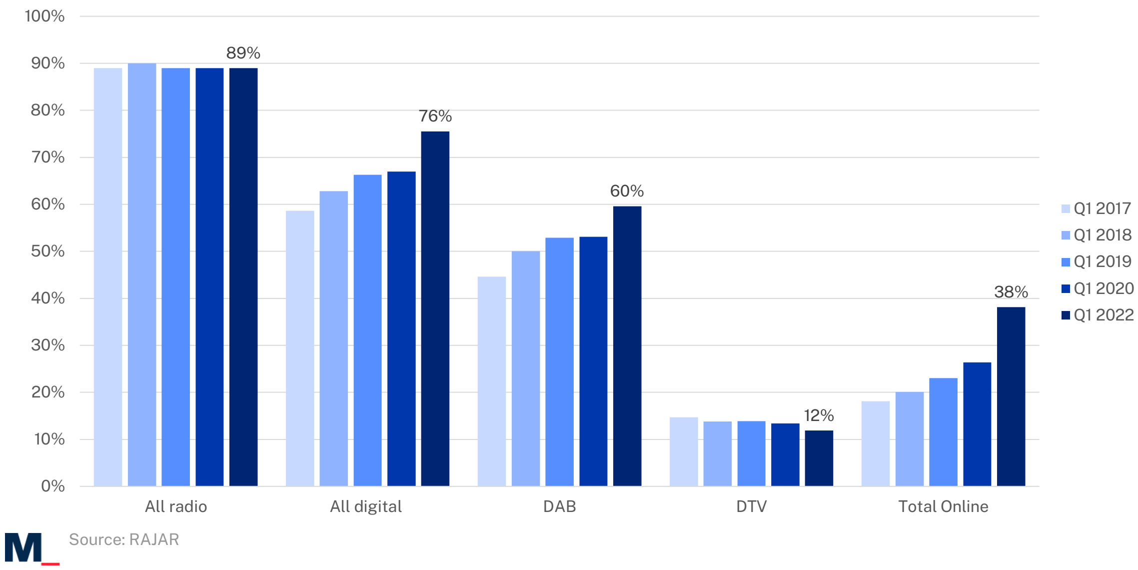
The growing UK audio landscape

Audio has had a form of renaissance over the past few years. Technological advancements have revolutionised new ways of both accessing and creating new content. And at the heart of this audio landscape remains radio, still an "at scale" audience.

Looking at the latest Q1 2022 RAJAR data, you can see the stability in radio listening, reaching 89% of the UK population on a weekly basis.

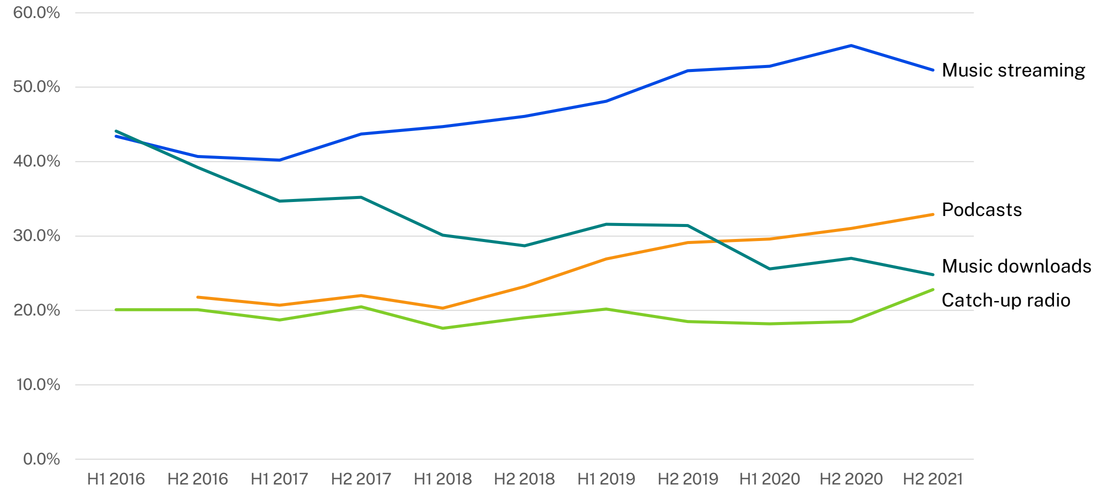
Listening weekly reach – trend



Growth continues for digital listening, which now sits at 76% weekly reach, whilst DAB has hit 60% reach, digital TV listening has dipped to 12% and total online listening is 38%. For the first time this quarter, RAJAR released breakdown figures of that total online listening, with websites and apps reaching 27% and smart speakers nearly 16%.

According to Mediatel's exclusive Connected Screens survey, radio listening figures are still strong with 80% of respondents claiming to have listened to radio in the past 12 months, despite a slight slow decrease over the past five years. Meanwhile, listening to music streaming services and podcasts have both grown over that time period, sitting at 52% and 33% respectively. You can view this chart overleaf.

Listening activities: past year – trend

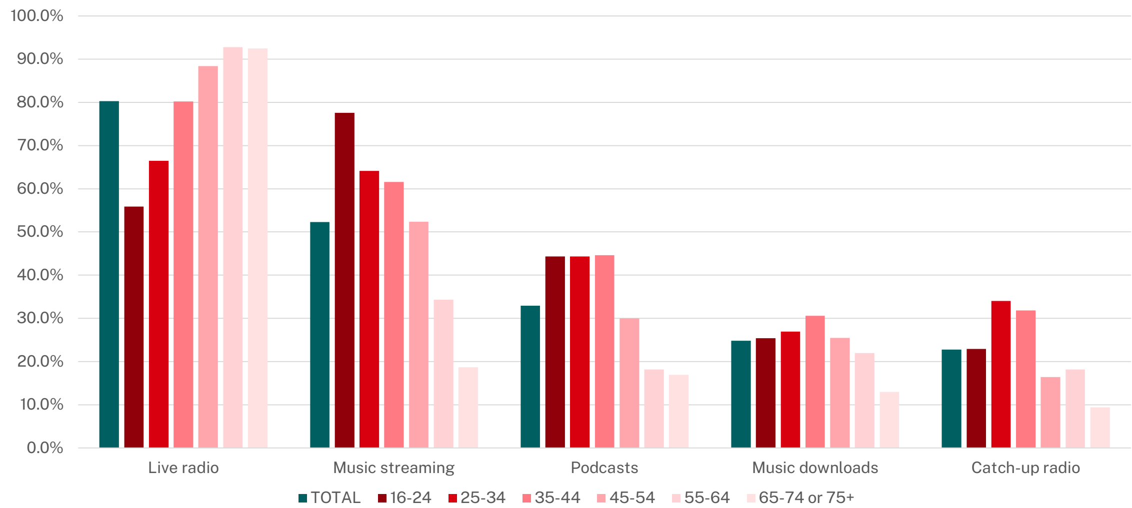


Source: Mediatel's Connected Screens H2 2021
Original question: Thinking about your use of TV, video and radio, which of the following have you done in the last 12 months?
NB: no fieldwork in H1 2021

Digging deeper into the data, we can see how these results change by age group.

For the 80% who claimed to listen to radio, this drops to 56% for 16-24s but climbs to nearly 93% for 65+. By comparison, music streaming has that pattern reversed, with younger audiences being more au fait with the technology, and figures gradually dropping as the age grows.

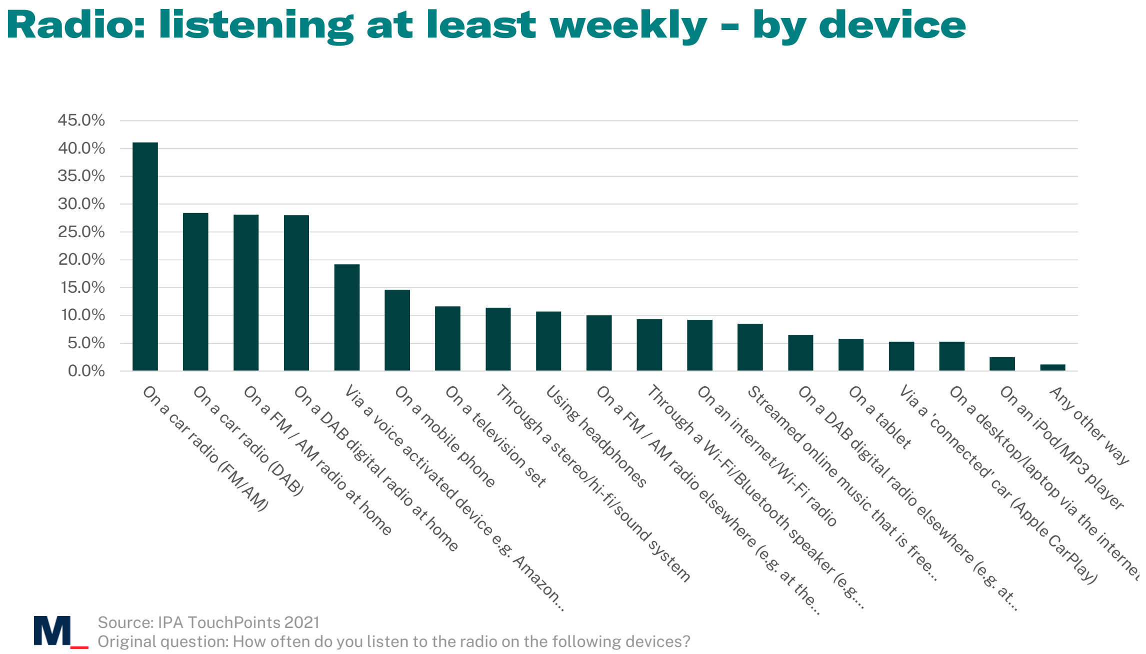
Listening activities: past year – split by age



Source: Mediatel's Connected Screens H2 2021
Original question: Thinking about your use of TV, video and radio, which of the following have you done in the last 12 months?

This same age pattern can be seen for podcasts, albeit from a lower overall total and therefore in a less dramatic fashion. Each of the age groups 16-24, 25-34 and 35-44 all have 44% claiming that they have listened to podcasts at some point in the past year, but these numbers are much lower for 55+.

With radio still being so dominant as an audio option, it's interesting to see how this content is being accessed. This chart, taking data from the IPA's TouchPoints 2021 dataset is looking at weekly radio listening, split by device.



The first four bars dominate the device choices. Listening via a car radio, whether by FM/AM or DAB, takes up the top two most popular methods, with 41% claiming to listen via FM/AM in the car (down from 47% last year) and 28% on DAB in the car. Accessing it at home by FM/AM radio and by DAB digital radio take up the next two slots, both at 28% claiming to use these methods.

Accessing radio via smart speakers is on the ascendency, with numbers increasing from 14% in 2020 during lockdown to 19% in 2021.

Meanwhile the ease of access to radio content makes for a long tail of access choices, from smart speakers, to tablets, to desktop.

Looking closer at the data, one age group had some interesting device choices, with 35-44s further embracing smart speakers.

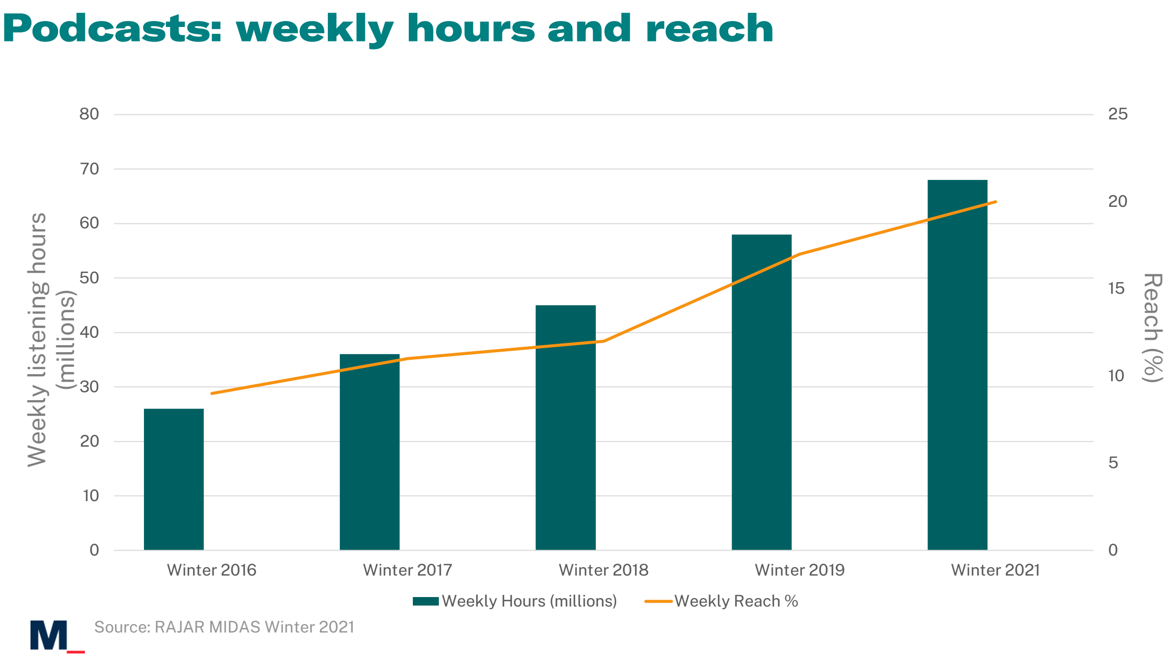
For this age group, the car options still came out on top, but there were more of this group using smart speakers for listening to the radio than non-car based FM/AM or DAB digital radios, with 26% of radio users in this age profile using voice activated smart speakers to listen to the radio at least weekly.

35-44s
19% - FM/AM radio (non-car)
24% - DAB digital radio (non-car)
26% - Voice activated device

Of the new technologies referenced earlier, podcasts is an area Mediatel Group is closely watching, and as demonstrated below, there has been a swift growth in podcast listening over the past five years.

While podcasts have been around for many years now, they are generating a lot of interest, as the medium's former niche appeal broadens across categories and genres, topics, celebrities and constantly extending the catalogue of fiction and non-fiction content.

According to RAJAR's Midas research, 20% of us listened to podcasts each week in 2021, which is double the number who listened in 2016.



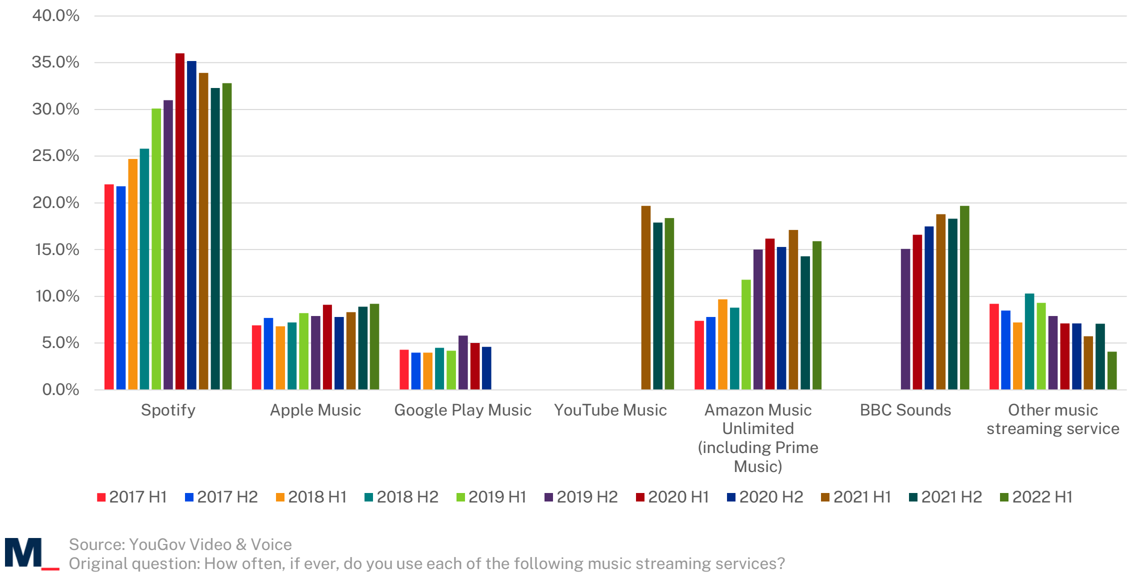
We now listen to almost 70 million hours of podcasts per week, which is over twice what we did four years ago. But despite this significant growth, there still remains plenty of potential for further expansion.

Mediatel Connected's recent infographic helps provide more insights around the podcast market, with data taken from another Mediatel Group whitepaper, the "*Who, What, When, Why, Where and How of Podcast Listening*".

Mediatel Connected
Are you listening?
Understanding the UK podcast market
1%
18%
2015
2020
Who? How many adults listen each week?
What?
60 million listening hrs per week
Favourite category is comedy
36%
HA! HA!
Education
5%
Wellbeing
4%
When?
through the day no distinct peaks
27% listen at least monthly
11% listen every day or most days
15
Why? 61%
Do Something Different
mainly listen for entertainment purposes
Where?
PODCAST
92% listen on their own
73% used smartphone at least monthly
47% at home
20% on public transport or walking
17% by car/ van/lorry
11% place of work/study
How?
BBC SOUNDS
most used app in the UK
48%
up 17% points year on year
29%
down 3% points year on year
PODCAST
All the data from this infographic originates from Mediatel's free whitepaper: The who, what, when, why, where and how of podcast listening. Download at https://info.mediatel.co.uk/consumersurveys-podcasts or scan QR code
Sources
Mediatel Connected Screens H2 2020
RAJAR MIDAS Spring 2020
IPA TouchPoints 2020
YouGov Video & Voice H2 2020

Meanwhile, the other big disruptors in the audio space are the audio streaming services.

Monthly listening to streaming services



Source: YouGov Video & Voice
Original question: How often, if ever, do you use each of the following music streaming services?

Referring back to the chart on P2, around 53% claimed to have used a streaming service in the past year, rising to 78% for 16-24s. Looking more closely at monthly listening, we've drilled down into the services available and Spotify leads the way. However, its fantastic growth trajectory appears to be stuttering with a reduction in claimed monthly listening since H1 2020. Even with this reduction it is still a long way ahead of its competition.

By comparison Apple Music and the older Google Play Music brand (which has recently been rebranded to YouTube Music) have remained very static despite the services' strong brands and easy access through smartphones. The introduction of the YouTube Music brand appears to have robust figures, but perhaps a percentage of the respondents listening claims were referring to any YouTube activity as opposed to specifically the audio streaming service despite clarity in the questionnaire, as it's a significant leap from the previous Google Play Music numbers.

Meanwhile, Amazon Music has over doubled its claimed monthly listening, likely assisted by the parallel growth of Echo smart speakers.

BBC Sounds was added to the survey in 2019 and, bolstered by a strong promotional push on the BBC platforms, it's currently the second most used service in the UK, advertising free, and enjoying a good growth trajectory.

The advertising options across streaming services and podcasts are now increasingly established.

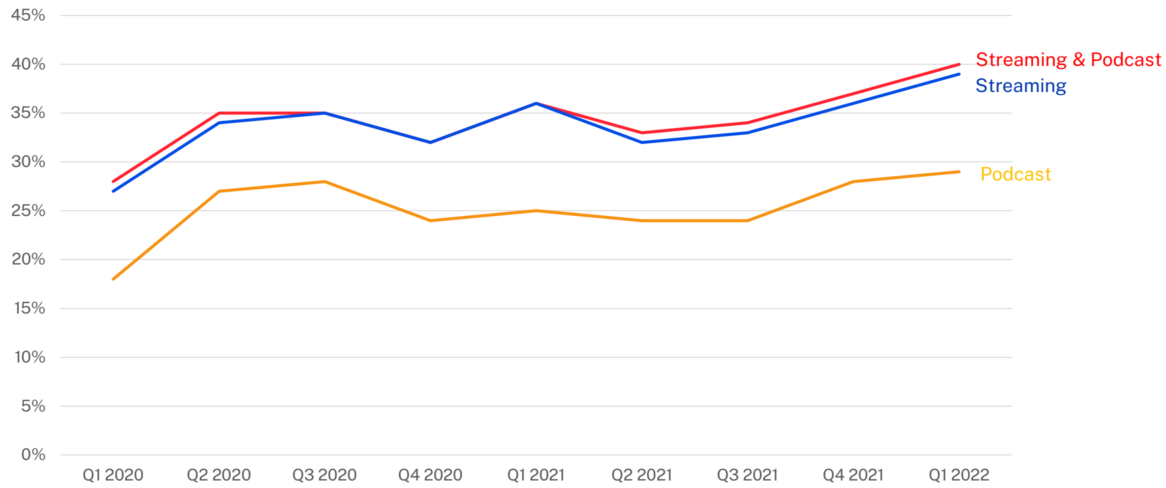
Mediatel proudly sits in the centre of the audio market, running both the audio trading system J-ET on behalf of the IPA and the Radiocentre since 1998, handling 90% of all national radio advertising with over 10,000 users.

And, in partnership with Peach, the Audiotrack product - a dedicated audio distribution service powered by J-ET - to make copy admin and audio distribution for advertising even easier. Audiotrack delivers to all audio channels including streaming and podcast platforms.

According to the latest exclusive data from Audiotrack, 29% of all linear advertising campaigns also now include campaigns on podcasts. This is up from 18% just two years ago.

Similarly, 39% of linear advertising campaigns include campaign activity on streaming services.

Audio advertising campaigns: % including streaming & podcasts

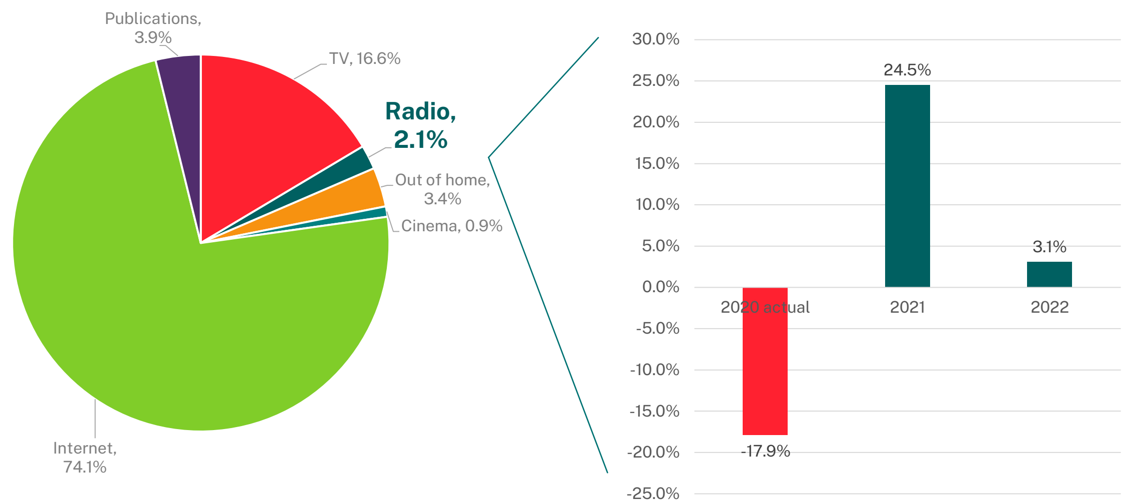


Source: Audiotrack

And 40% of linear campaigns now include an element of digital audio, up from 28% two years ago, with numbers on the ascendancy, as tech infrastructure improves, helping clients to become increasingly confident with investing in these digital audio channels alongside their traditional linear campaigns and the positive impact that the complementary audio options have on clients' ROI.

All of these technological advancements in audio and an increased interest and appetite in listening, will understandably be having an impact on audio's financial performance.

Adspend share (2022) & radio forecast



Source: Mediatel Connected & AA/WARC – April 2022

According to the April 2022 latest release from AA/WARC, radio (which by its definition encompasses spots, sponsorship and digital ad formats) currently makes up 2.1% of the total UK adspend share, forecast for £741 million in 2022, up from £577 million in 2020.

Like many media in 2020, the pandemic was instrumental in a dramatic decline, with advertising spend down 17.9% on the previous year's figures, but AA/WARC forecast that these numbers rebounded well during 2021 to 24.5% growth, with 2022 expected to increase by 3.1%.

2022 looks financially very positive, and with a solid audience for the radio, podcasts and streaming services on the ascendancy, the overall picture for audio in the UK looks extremely strong as we hopefully move on from the pandemic and into a new normal.

Further information

All the data within this whitepaper has originated from the Mediatel Connected data product. Containing independent media research, analysis and planning apps it provides information in one simple to use platform. It's the first stop for agencies, media owners, brands and academic institutions.

Mediatel Connected's Consumer Surveys app contains industry research from six key surveys covering the UK media market:

Mediatel's Connected Screens survey

6 monthly

2,000 respondents, nationally representative

Exclusive. Online survey, broadband households

Track screen ownership and screen behaviour

Ofcom Technology Tracker

6 monthly

Around 3,000 face-to-face home interviews

Nationally representative

Track attitudes and behaviour on broadcasting

BARB Establishment Survey

Quarterly, constant feedback

53,000 interviews per year

Nationally representative

Device ownership and subscription levels

YouGov Video & Voice

6 monthly

2,000 respondents

Exclusive. Online survey, broadband households

Video & audio brands; voice activated market

TouchPoints

Annual

6,000 online self-completion questionnaire

Nationally representative

Covering attitudes, shopping and media behaviour

RAJAR MIDAS

Quarterly

2,000 RAJAR respondents

Online diary and questionnaire

Digital audio across different platforms and devices

Consumer Surveys is just one of many apps provided by Mediatel Connected, the largest single source of media intelligence in the UK: mediatel.co.uk/connected

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