

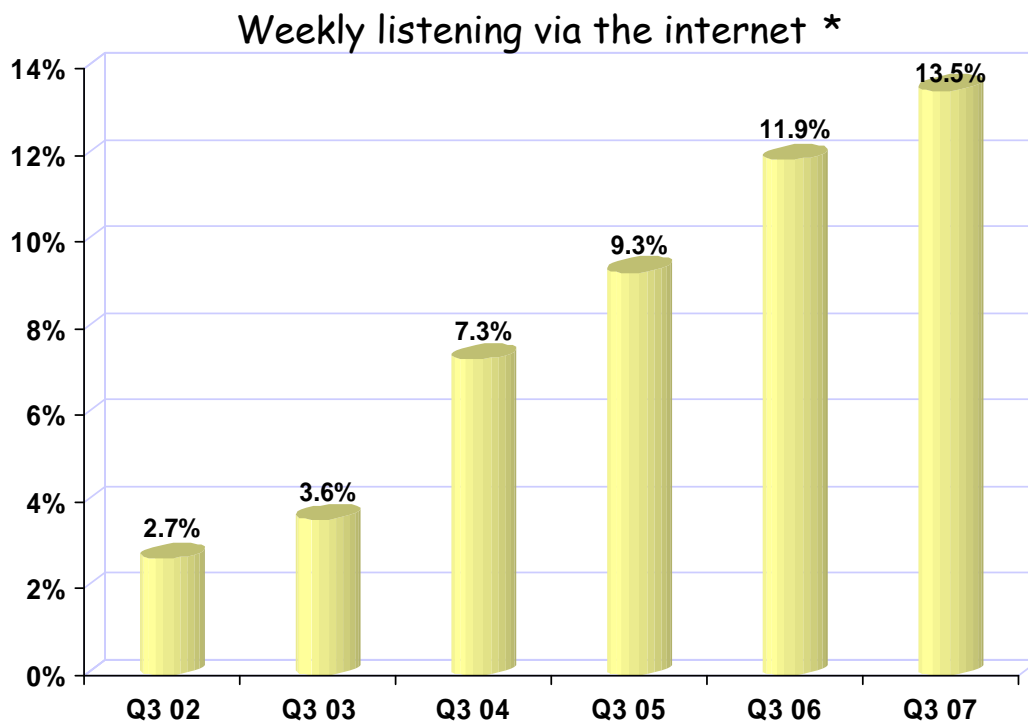
Podcasting and Radio Listening via Internet Survey

January 2008



1. Introduction

Over the past few years the Internet has proved to be a very successful platform for delivering audio content, perhaps most notably for live streaming. Nowadays, just about every UK radio station has an online listening facility and several have developed Listen Again services where people can catch programmes that they might have missed earlier in the week.



Base: All adults 15+

Source: RAJAR/Ipsos MORI

(* Respondents who claimed to listen to the radio via the Internet at least once a week. Includes Listen Again + listening to foreign stations and other non-RAJAR services)



Intelligent interactive software has enabled Personalised Online Radio (POR) services to gain a foothold, while the Internet has enabled broadcasters, newspapers, and other producers of audio to potentially reach a whole new audience via Podcasts - downloadable files that can be listened to at the downloader's convenience.

RAJAR traditionally only measures live radio. Listen Again, POR and Podcasts reside outside of the measurement spectrum. However, many RAJAR subscribers are actively involved in those particular areas, and conduct that business largely without any real information on actual consumption. Additionally, there is little or no knowledge of how these relatively new media formats are impacting on conventional radio.

In an effort to fill these voids, RAJAR commissioned a piece of research under the working title "Podcasting And Radio Listening Via Internet Survey"

The survey was conducted in September and October 2007 by Ipsos MORI using a sample of RAJAR respondents from the previous 9 months who had claimed to listen to the radio via the Internet, or downloaded Podcasts.

Following an invitation to provide their email addresses for further research, a total of 1,453 people (all adults aged 15 or over) within the target audience (i.e. respondents who had claimed to listen to the radio via the Internet and / or download Podcasts) were invited to participate in the survey by completing an online questionnaire, and at the cut-off point, 681 had completed the survey. This number finalised at 639 after QC procedures had been implemented and this report is based on their responses.

This survey is very much a toe in the water. Although we already knew that Listen Again, Personalised Online Radio and Podcasting had many advocates we knew nothing of their standing in the mainstream. This survey tells us and our subscribers, who are actively involved in these areas, more about them.

2. Summary

Almost 12 million people have claimed to listen to radio via the Internet, including 9.1 million listening live and 7.6 million who have used Listen Again services. In addition, 4.3 million have downloaded a Podcast.

In any given week, 8.1 million people listen to radio via the Internet, either live or through a Listen Again service, and 1.87 million listen to a Podcast.

The average user of Listen Again services listens to 1.88 programmes each week. Three quarters of Listen Again listeners say the service has no impact on the amount of live radio that they listen to; however, 13% claim to now listen to more live radio while 8% say they listen to less. Almost half of Listen Again listeners said they are now listening to radio programmes that they didn't previously listen to as a result of the Listen Again service.

The typical Podcast user subscribes to 3.16 Podcasts and spends 53.6 minutes per week listening to them. Comedy and music are the two favourite genres.

iTunes is the software of choice, used by two thirds of Podcast users to subscribe to Podcasts, while almost a quarter (23%) simply download directly from the website via their browser. 80% listen to Podcasts on their home computer, and 61% listen using a portable audio/mp3 player.

Podcast listening occurs throughout the day, with an evening peak when 46% of Podcast users tune in. 73% listen to Podcasts that are more than a week old.

Podcasting appears to have a positive effect on live radio listening - almost 18% say they now listen to more live radio since they started downloading Podcasts while only 8% say they listen to less, and 31% say they are now listening to radio programmes that they never used to listen to before thanks to Podcasts.

Thinking about how Podcasts may be funded in the future, there is some appetite among the Podcast community for Podcasts containing adverts if they were free as a result with 58% saying they would be interested in

downloading such content; however, only 28% responded positively to the idea of Podcasts without adverts that had to be paid for.

3. Report

Unless otherwise stated, the sample size for tables is 639.

How Often?

Almost a quarter (23.7%) of the UK's adult population (those aged 15 or over) have listened to radio via the Internet. That equates to nearly 12 million people (11,911,000).

Two thirds of these, or 16.1% of the adult population, listen at least once a week, with 4.6% listening via the Internet every day or most days - that's 2.3 million people.

Table 1: How often do you generally listen to the radio via the Internet?		
	('000s)	(%)
Base = All Adults aged 15+	50,344	100%
Ever listen via Internet	11,911	23.7
Several times a day	391	0.8
Everyday/most days	1,931	3.8
2-3 days per week	2,374	4.7
About once a week	3,393	6.7
About once a month	2,071	4.1
Less often	1,752	3.5
Never listen via Internet	38,423	76.3

Where & When?

The vast majority of Internet radio listeners (91.5%) listen at home; almost 1 in 4 listen at work (22.8%) while 5.5% listen elsewhere.

Asked when they listen, 36.1% (4.3 million) said their listening was always in real time. A further 23.8% (2.8 million) said they listened at a later time than the original broadcast, while 40.1% (4.8 million) used a combination of real time and Listen Again, meaning that 7.6 million people use Listen Again facilities.

Table 2: Where/when do you listen to radio via the Internet?		
Sample size = 574	('000s)	(%)
Base = all listening via Internet	11,911	100%
Where?		
At home	10,903	91.5
At work	2,715	22.8
Elsewhere	652	5.5
When?		
Using live streaming	4,298	36.1
Using Listen Again	2,840	23.8
A combination of these	4,774	40.1

Listen Again

Those who said they have used a Listen Again service were asked about the programmes they had listened to in the past 7 days. Approximately half of this sample listened to 1 or 2 programmes, with the average coming in at 1.88.

Table 3: Number of Listen Again programmes in past 7 days		
Sample size = 370	'000s	%
Base = All who listen again	7,614	100%
0	1,742	22.9
1	2,325	30.5
2	1,406	18.5
3	960	12.6
4	541	7.1
5	301	4.0
6+	337	4.4
Mean (excludes not stated)	1.88	

We asked the Listen Again audience some questions about the impact that Listen Again had on their other listening to music and radio.

On balance Listen Again had a positive affect on overall listening, with 13.1% claiming to listen to more live radio since discovering Listen Again, and 8% listening less, although only 1.5% claimed to be listening to significantly less live radio. The vast majority (75.3%) said it had no effect either way.

Table 4: Since you started listening after the original time of broadcast (Listen Again), how would you say your live radio habits have changed?		
Sample size = 370	('000s)	(%)
Base = all who Listen Again	7,614	100%
I now listen to...		
(5) ...much more live radio	314	4.1
(4) ...more live radio	686	9.0
(3) ...just as much as before	5,737	75.3
(2) ...less live radio	496	6.5
(1) ...much less live radio	112	1.5
Mean score out of 5	3.08	

Furthermore, almost half of Listen Again listeners (49.3%, or 3.75 million) say they now listen to radio programmes that they didn't previously listen to as a result of the Listen Again service.

Assessing the impact of Listen Again on pre-recorded music (CDs, mp3s, vinyl, tape), once again there was an overall positive impact. 81% claimed it had no effect whatsoever, 10% said they now listen to more pre-recorded music while only 6% said they listened to less.

Table 5: Has using Listen Again changed how much recorded music you listen to?		
Sample size = 370	('000s)	(%)
Base = all who Listen Again	7,614	100%
I now listen to...		
(5) ...much more music	225	3.0
(4) ...more music	546	7.2
(3) ...just as much as before	6,191	81.3
(2) ...less music	423	5.6
(1) ...much less music	32	0.4
Mean score out of 5	3.07	

Personalised Online Radio (POR)

Personalised Online Radio is an online service that uses a music recommendation system. Intelligent software selects music for listeners based on their personal likes and dislikes. Some of the better known examples are LastFM and Pandora. Asked if they were aware of such services, 30% of Internet radio listeners (3.97 million) said that they were.

People who said they were aware of POR were asked how often they used it. Almost a quarter of a million people (247,000) use a POR service everyday, and nearly a million people are weekly users (973,000).

Table 6: How often do you use Personalised Online Radio?		
Sample size = 71	('000s)	(%)
Base = All POR users	1,649	100%
Use everyday	247	15.0
Use 2-3 times per week	226	13.7
Use about once a week	288	17.5
Use about once a month	205	12.4
Use less often	585	35.5
Varies	97	5.9

All users were asked if POR had changed how much conventional radio they listened to.

Table 7: Has using POR changed how much traditional live radio you listen to?		
Sample size = 71	('000s)	(%)
Base = All POR users	1,649	100%
I now listen to...		
(5) ...much more live radio	46	2.8
(4) ...more live radio	70	4.2
(3) ...just as much as before	1,171	71.0
(2) ...less live radio	189	11.5
(1) ...much less live radio	53	3.2
Mean score out of 5	2.91	

The table shows a marginal negative effect, which is understandable given that POR is positioned as "personalised radio". However, for 78% of users, POR has not eroded their traditional radio listening, and only 6% admitted that it had made a significant difference - 2.8% listening to much more and 3.2% to much less.

Media Players and Software

All respondents (i.e. everyone who listens to radio via the Internet or downloads Podcasts) were asked which media player software they use to organise music and/or audio on their PCs at home and at work. At home, Windows Media Player came out well on top, being mentioned by 7.83 million users. The next most popular applications were iTunes (5.19 million) and RealPlayer (4.99 million).

At work, Windows Media Player was still the preferred software with 2.1 million users. RealPlayer was mentioned by 1.13m and iTunes by 0.75m.

Table 8: Which media player software do you use to organise music / audio on your computer? (Top 3 answers)				
	At Home		At Work	
	'000s	%	'000s	%
Base = All respondents	13,241	100%	13,241	100%
iTunes	5,190	39.2	752	5.7
Windows Media Player	7,831	59.1	2,148	16.2
RealPlayer	4,989	37.7	1,134	8.6

Among the same group, the Apple iPod was the favourite portable mp3 or Digital Audio player, with 4.23 million users. The nearest competitor - the Sony Walkman - came in with 1.86 million.

Table 9: Which portable mp3 or digital audio players do you own? (Top 3)		
	'000s	%
Base = All respondents	13,241	100%
Apple iPod (any model)	4,234	32.0
Sony Walkman	1,861	14.1
Creative Zen	899	6.8

Podcasts

A total of 4.27 million people have ever downloaded Podcasts, representing one in 12 of UK adults (8.5%). 1.87 million listen to Podcasts at least weekly.

Table 10: How often do you generally listen to Podcasts?			
	'000s	% All	% Podcast users (Sample = 187)
All adults...	50,334	100%	
...downloading Podcasts...			
...ever	4,271	8.5	100%
...more than once a day	172	0.3	4.0
...once a day	70	0.1	1.6
...several days a week	532	1.1	12.5
...once or twice a week	1,093	2.2	25.6
...once or twice a month	1,454	2.9	34.0
...less often	901	1.8	21.1
...not sure	47	0.1	1.1

Asking people for a minute-perfect assessment of the time they spend listening to Podcasts was deemed impractical so instead, they were asked to select the time-band that best reflected their consumption. By taking the mid point in the estimations, we are able to calculate an approximate average duration. In a typical week, the average Podcast listener listens for just less than an hour (53.6 minutes), and an extrapolation of this figure shows that the average UK adult listens for 4.5 minutes of Podcasts per week.

Table 11: In an average week, how long do you spend listening to Podcasts?			
	'000s	% All	% Podcast users
All adults...	50,334	100%	(Sample = 187)
...downloading Podcasts...	4,271	8.5	100%
Less than 30 minutes (15)	1,809	3.6	42.4
30 minutes to an hour (45)	1,454	2.9	34.0
1-2 hours (90)	429	0.9	10.0
2-3 hours (150)	311	0.6	7.3
3-5 hours (240)	168	0.3	3.9
> 5 hours (300)	36	0.1	0.8
Not sure	65	0.1	1.5
Average minutes per week		4.5 mins	53.6 mins

Types of Podcast

Asked what types of Podcast they were interested in, more than 2.3 million opted for Comedy. Next came Music, TV & Film and News & Politics, all of which achieved over a million mentions. However, when asked which particular types of Podcast they actually subscribed to, there were some differences. Comedy, Music and News & Politics were still numbers 1, 2 and 4 respectively, but TV & Film and Sports & Recreation were replaced at 3 and 5 by Technology (3) and Society & Culture (5).

	Interested in...		Subscribe to...	
	'000s	% (Rank)	'000s	% (Rank)
Sample size = 187				
Base = All Podcast users	4,271	100%	4,271	100%
Comedy	2,359	55.2 (1)	1,283	30.0 (1)
Music	1,645	38.5 (2)	1,055	24.7 (2)
TV & Film	1,394	32.6 (3)	578	13.5 (8)
News & Politics	1,053	24.7 (4)	742	17.4 (4)
Sports & Recreation	969	22.7 (5)	594	13.9 (7)
Technology	917	21.5 (6)	917	21.5 (3)
Business	865	20.3 (7)	405	9.5 (9)
Arts	851	19.9 (8)	336	7.9 (10)
Society & Culture	660	15.5 (9)	660	15.5 (5)
Science & Medicine	644	15.1 (10)	644	15.1 (6)
Games & Hobbies	503	11.8 (11)	252	5.9 (11)
Education	451	10.6 (12)	235	5.5 (12)
Religion & Spirituality	391	9.1 (13)	228	5.3 (13)
Kids & Family	304	7.1 (14)	112	2.6 (14)
Health	290	6.8 (15)	98	2.3 (15)
Gov'tment/Organisations	262	6.1 (16)	36	0.9 (16)

Almost 60% of Podcasts downloaded in the past 7 days have been listened to in their entirety, and only 1 Podcast in 8 (12.7%) is listened to for less than half of its duration.

	'000s	%
Sample size = 187		
All Podcasts...	6,696	100%
The whole episode	3,994	59.6
Most of it	865	12.9
About half	370	5.5
Less than half	313	4.7
None	534	8.0
It varies widely	620	9.3

Podcasts in General

Overall, Podcast users subscribe to an average of 3.16 Podcasts per head.

Sample size = 187	'000s	%
Base = All Podcast users	4,271	100%
0	527	12.3
1	966	22.6
2	568	13.3
3	369	8.6
4	369	8.6
5	156	3.7
6-10	301	7.0
11+	183	4.3
Mean (excludes not stated)	3.16	

Respondents were asked what proportion of the individual Podcast episodes they normally listen to. Almost half (47.4%) claimed that they usually listen to the whole episode, and nearly a third (32.1%) said they listened to most of it.

Sample size = 187	'000s	%
Base = All who ever download Podcasts	4,271	100%
The whole episode	2,024	47.4
Most of it	1,369	32.1
About half	203	4.8
Less than half	181	4.2
None	95	2.2
It varies widely	155	3.6
Don't know	244	5.7

Respondents were next asked if they ever listen to Podcast episodes that are more than a week old. Almost three quarters (72.8%) said that they do.

Software

The most popular software used to download and play Podcasts is iTunes, which was chosen by two thirds (66.5%) of Podcast users. Other popular software to be mentioned was QuickTime, Juice and Mozilla.

Table 16: What software program do you use to subscribe to Podcasts?		
Sample size = 187	'000s	%
Base = All Podcast users	4,271	100%
iTunes	2,839	66.5
QuickTime	326	7.6
Juice	234	5.5
Mozilla	91	2.1
Zencast/Zencast Organiser	79	1.8
Sony PSP	66	1.5
Doppler	32	0.7
Directly via website/browser	990	23.2
Other	85	2.0

Hardware

Only a small minority (10.4%) of Podcast users subscribe to the same Podcasts on more than one computer (for example, at home and at work).

The PC is the number one device when it comes to listening to Podcasts for over 80% of downloaders; however, a significant number also use a portable audio player (60.6%) such as an iPod. The following table shows the devices used in order of preference.

Table 17: On which of the following do you listen to Podcast episodes?		
Sample size = 187	'000s	%
Base = All Podcast users	4,271	100%
Home computer (PC/Mac)	3,432	80.4
Portable mp3/digital audio player	2,589	60.6
Mobile phone	270	6.3
Through a home hi-fi	254	5.9
Other	337	7.9

Podcast Listening Behaviour

Four out of five (80%) Podcast users like to listen to Podcasts at home - that's 3.4 million adults. The car is the next most popular location, being favoured by one in four (24%, or just over 1 million), while public transport (21.5%), walking (21%) and the workplace (18%) also featured.

Table 18: Where do you normally listen to Podcasts?		
Sample size = 187	'000s	%
Base = All Podcast users	4,271	100%
At home	3,402	79.7
In the car	1,024	24.0
On public transport	920	21.5
Whilst walking	897	21.0
At work	769	18.0
Whilst exercising	399	9.3

The late afternoon and evening are the favourite times of day to listen to Podcasts, although there is a significant level of listening throughout the day. Apart from midnight to 6am, the least likely time to find people listening to Podcasts is between noon and 4pm.

Sample size = 187	'000s	%
Base = All Podcast users	4,271	100%
Early morning (6am-9am)	1,088	25.5
Mid morning (9am-12pm)	967	22.6
Lunchtime (12pm-2pm)	633	14.8
Early afternoon (2pm-4pm)	745	17.4
Afternoon/early evening (4pm-7pm)	1,541	36.1
Evening (7pm-midnight)	1,955	45.8
Overnight	303	7.1
Don't know	478	11.2

For most people, the freedom to listen when they want is perceived as the main benefit of Podcasts, with almost 60% citing this as the main benefit and a total of 89% including it in their top 3 benefits. Being able to hear radio shows that they have missed is the second biggest benefit - almost a quarter mentioned this as their main reason. Sound quality was not considered to be a benefit, nor was the ability to share programme content with friends - only 7% and 3% respectively counted these factors among the benefits.

	Main Benefit		All Mentions	
	'000s	%	'000s	%
Sample size = 187				
Base = All Podcast users	4,271	100%	4,271	100%
I can listen when I want	2,548	59.7	3,797	88.9
I can hear shows I missed on the radio	1,047	24.5	2,930	68.6
I can transfer files to a portable device	229	5.4	1,716	40.2
I can collect audio for listening in future	128	3.0	863	20.2
I can listen more than once	70	1.6	1,329	31.1
I can fast forward & rewind the programme	49	1.1	1,125	26.3
Good sound quality	0	0	310	7.3
I can share them with friends	0	0	145	3.4

Finally in this section, respondents were asked if they had ever listened to an enhanced Podcast (i.e. with chapters and pictures). Only 17.9% said that they had, while over 11% did not know whether they had or not.

Table 21: Have you ever listened to an enhanced Podcast?		
Sample size = 187	'000s	%
Base = All Podcast users	4,271	100%
Yes	766	17.9
No	3,028	70.9
Don't know	478	11.2

Deleting and Unsubscribing

A Podcast differs from a standard audio file for its use of RSS (Really Simple Syndication) feed technology. This means that once a Podcast has been subscribed to, and until the recipient decides to unsubscribe, subsequent episodes will be flagged and in most cases automatically delivered to the Podcast subscriber.

A majority of Podcast users (60%) said that they normally delete the file after they have listened to a Podcast.

Table 22: After listening to a Podcast, do you normally delete it?		
Sample size = 187	'000s	%
Base = All Podcast users	4,271	100%
Yes	2,572	60.2
No	1,465	34.3
Don't know	234	5.5

Asked why they might keep some Podcasts after they have listened, the two biggest answers were to listen to them again in the future, and to keep a collection.

Table 23: Why do you normally keep at least some Podcast episodes?		
Sample size = 74	'000s	%
Base = All who do not delete	1,699	100%
To listen to them again in the future	1,046	61.6
To keep a collection	503	29.6
To send to friends	116	6.8
To edit/use audio for own purposes	67	3.9

Fewer than half of the sample have ever unsubscribed to a Podcast.

Table 24: Have you ever unsubscribed from a Podcast?		
Sample size = 187	'000s	%
Base = All Podcast users	4,271	100%
Yes	1,837	43.0
No	1,900	44.5
Don't know	534	12.5

Those that have unsubscribed were asked why they had done so. The majority of responses indicate a lack of commitment or interest, with more than half saying they got bored with it, and 42% losing interest in the subject. 43% simply couldn't find time to listen.

Table 25: Why did you unsubscribe from a Podcast?		
Sample size = 79	'000s	%
Base = All who have unsubscribed	1,837	100%
I got bored of the content	1,041	56.7
I couldn't find time to listen	791	43.1
No longer interested in subject	776	42.2
Podcast was not updated often enough	365	19.9
Quality was not good enough	237	12.9
Podcast was too short / too long	101	5.5

Podcasts do not have a detrimental effect on live radio listening. Almost 70% say they listen to just as much live radio as before they started

listening to Podcasts, and of the remainder, twice as many people claim (18%) to now listen to more live radio than those who claim to listen to less (8%).

Table 26: Since you started listening to Podcasts, how would you say your live radio listening habits have changed?		
Sample size = 187	('000s)	(%)
Base = All Podcast users	4,271	100%
I now listen to...		
(5) ...much more live radio	253	5.9
(4) ...more live radio	508	11.9
(3) ...just as much as before	2,956	69.2
(2) ...less live radio	302	7.1
(1) ...much less live radio	34	0.8
Mean score out of 5	3.16	

Almost a third of Podcast users (31.6%) say that they now listen to radio programmes that they didn't previously listen to as a result of downloading Podcasts.

Table 27: Has listening to Podcasts changed how much recorded music you listen to?		
Sample size = 187	('000s)	(%)
Base = All Podcast users	4,271	100%
I now listen to...		
(5) ...much more music	224	5.2
(4) ...more music	400	9.4
(3) ...just as much as before	3,022	70.8
(2) ...less music	364	8.5
(1) ...much less music	53	1.2
Mean score out of 5	3.09	

Furthermore, Podcasts have encouraged people to spend more time listening to their mp3 players - almost half listen just as much as before, while almost 4 out of 10 (39%) listen more. Only 1% claim to now listen to their mp3 player less.

Table 28: Has listening to Podcasts changed how much time you spend listening to your mp3 player?		
Sample size = 187	('000s)	(%)
Base = All Podcast users	4,271	100%
I now listen to my mp3 player...		
(5) ...much more	472	11.0
(4) ...more	1,183	27.7
(3) ...just as much as before	2,055	48.1
(2) ...less	20	0.5
(1) ...much less	32	0.7
Mean score out of 5	3.54	

Only 176,000 people (4.1% of Podcast users) said that they had paid to subscribe to a Podcast, and only 546,000 (12.8%) said that they would ever be willing to pay for any.

Asked to think about how Podcasts might be paid for in future, there was some interest in advert-sponsored content, with more than half (57.3%) of Podcast users expressing interest.

Table 29: In the future, how interested would you be in downloading a free Podcast containing adverts?		
Sample size = 187	('000s)	(%)
Base = All Podcast users	4,271	100%
Very interested	720	16.9
Quite interested	1,740	40.7
Not very interested	829	19.4
Not interested	796	18.6
Don't know	187	4.4

However, there was far less interest in paid-for Podcasts, even without advertising. Only 28.1% answered positively, with almost two thirds saying they had little or no interest.

Table 30: In the future, how interested would you be in downloading a paid-for Podcast but without adverts?		
	('000s)	(%)
Base = All Podcast users	4,271	100%
Very interested	264	6.2
Quite interested	935	21.9
Not very interested	1,228	28.8
Not interested	1,575	36.9
Don't know	269	6.3

Finally respondents were asked if they thought they would download more Podcasts if they could contain full-length music tracks. (Currently, music right holders greatly limit what music can be used on Podcasts, which leads to music being removed altogether from the majority of radio programmes made available as a Podcast.) There was significant interest (66%) in such Podcasts if they were free, but support slipped away dramatically (down to 10.7%) at the prospect of having to pay for them. Interestingly, over a quarter of Podcast users didn't know if they would pay for such music content or not.

Table 31: If Podcasts could contain music, would you download more?		
	('000s)	(%)
Sample size = 187		
Base = All Podcast users	4,271	100%
If they were free...		
Yes	2,817	66.0
No	962	22.5
Don't know	492	11.5
If you had to pay a fee...		
Yes	456	10.7
No	2,651	62.1
Don't know	1,165	27.3