

AUDIO TRENDS FROM THE UK

Audio Technology & Needs States: Pre and Post Pandemic Insights

Ipsos in South Africa

26 June, 2023

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GAME CHANGERS



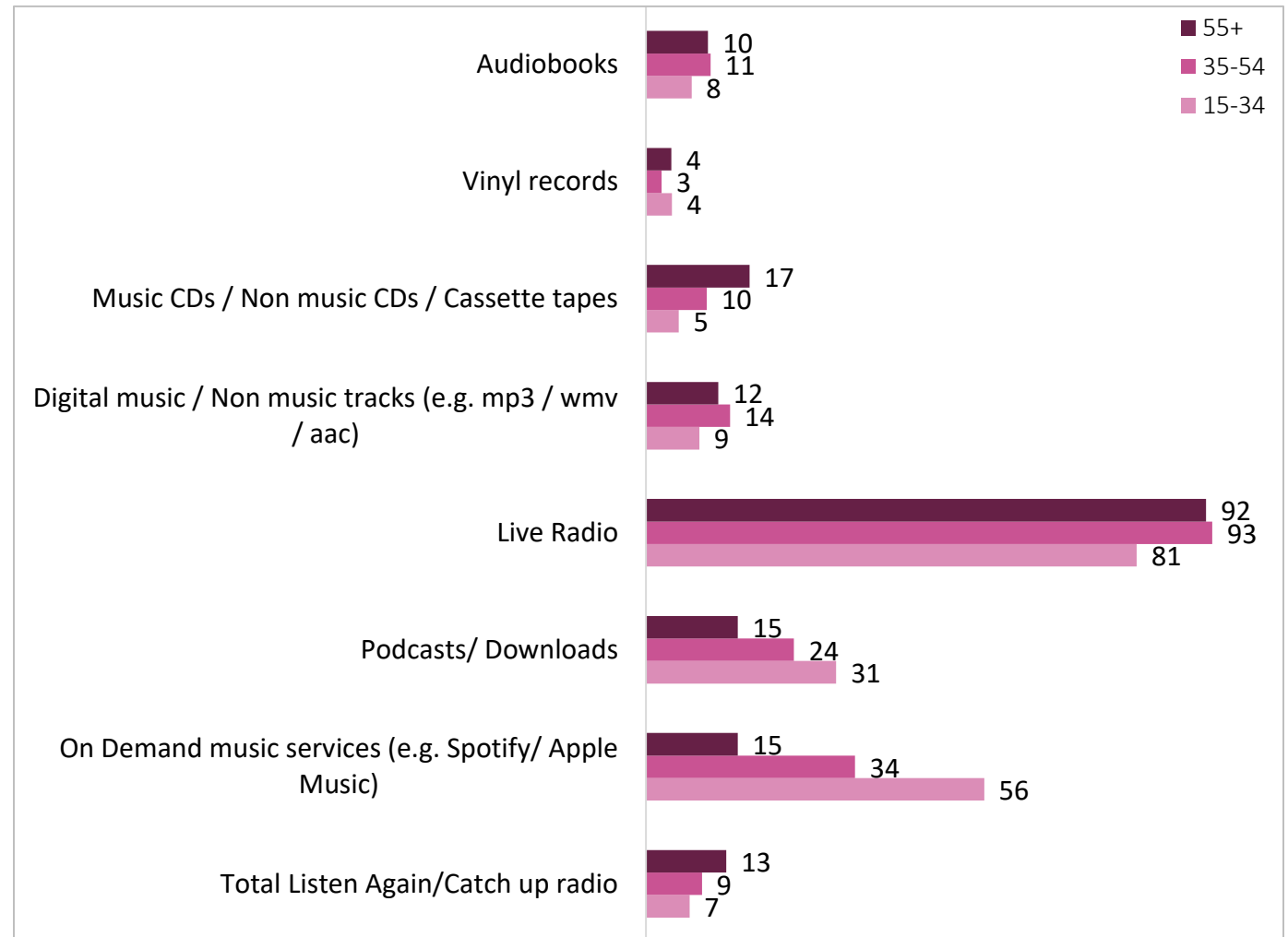
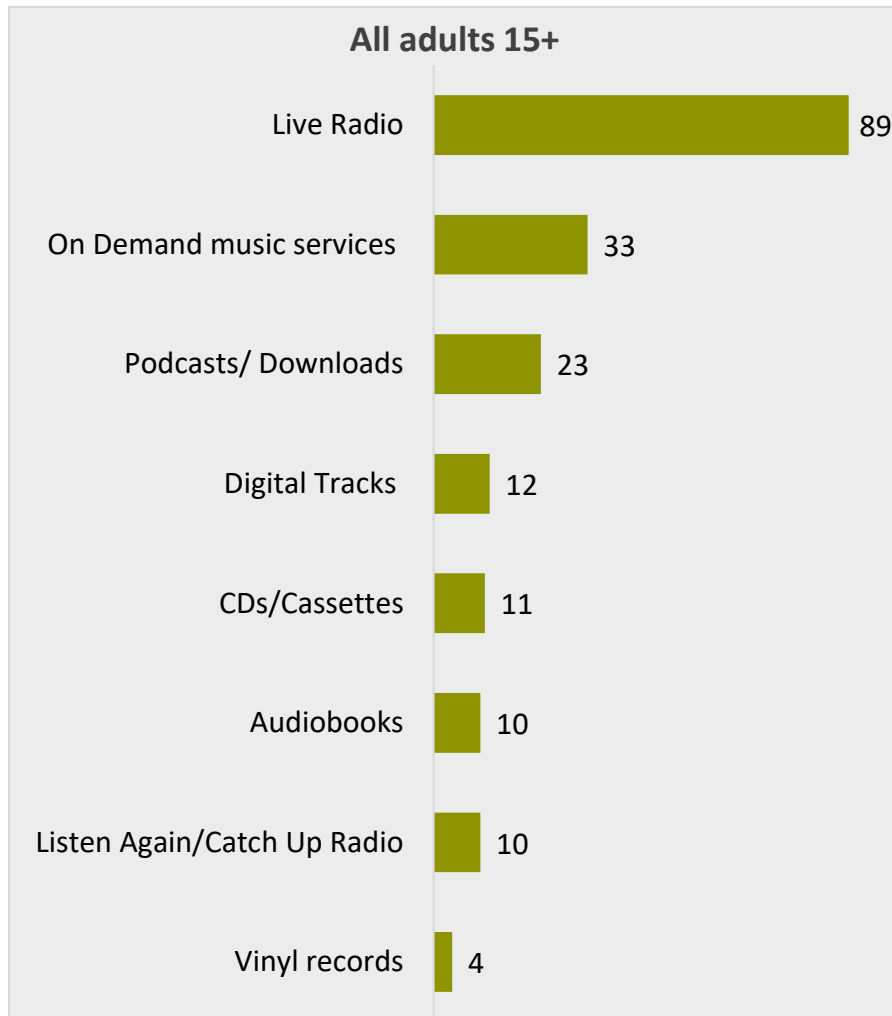
AUDIO TRENDS FROM THE UK

Pre & Post Covid
Pandemic Insights
(Research Sources)

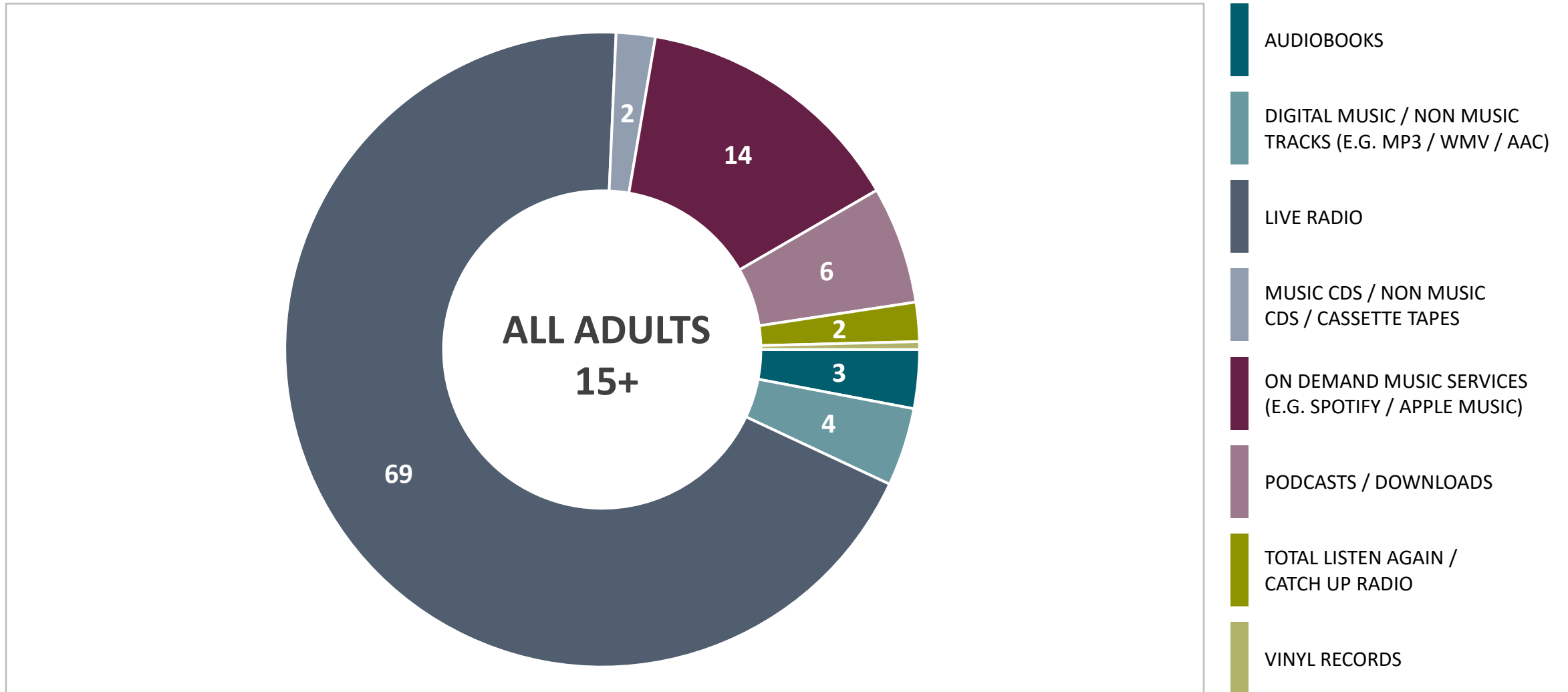


- This presentation looks at how technology advancements, coupled with behavioural changes post COVID, have changed the Audio landscape.
- The presentation uses data from two data sources, the MDAS survey from RAJAR and the Generation Audio (Need States) from the Radiocentre.
- Although these are both UK studies, they are up to date and also may provide insight on the direction of travel for the take up of Digital Audio Services and how Audio fits into a the media landscape in a post pandemic world.
- A special thank you to Charles Lawrie (RAJAR) and Mark Barber (Radiocentre) for permission to share the findings with you

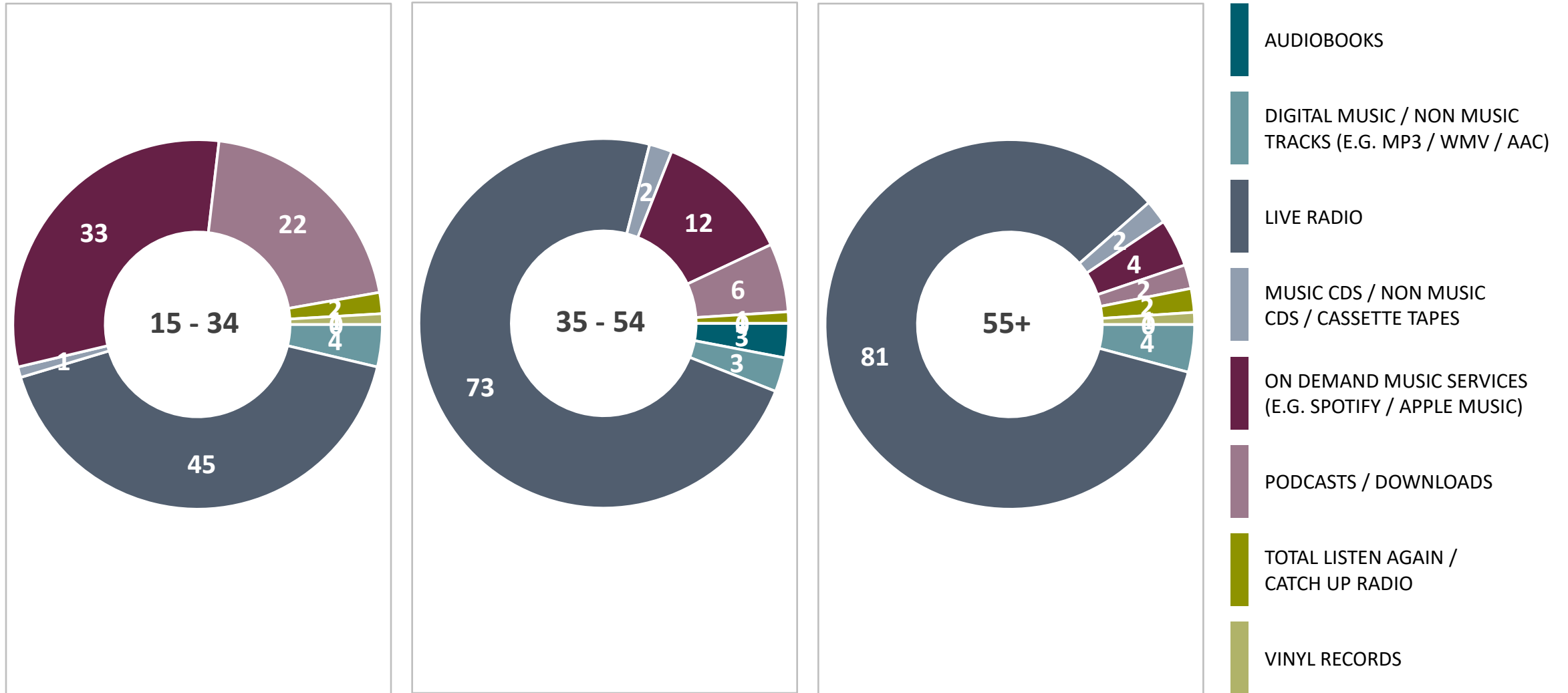
AUDIO TYPES – WEEKLY REACH %



Audio Excluding Visual – Share %



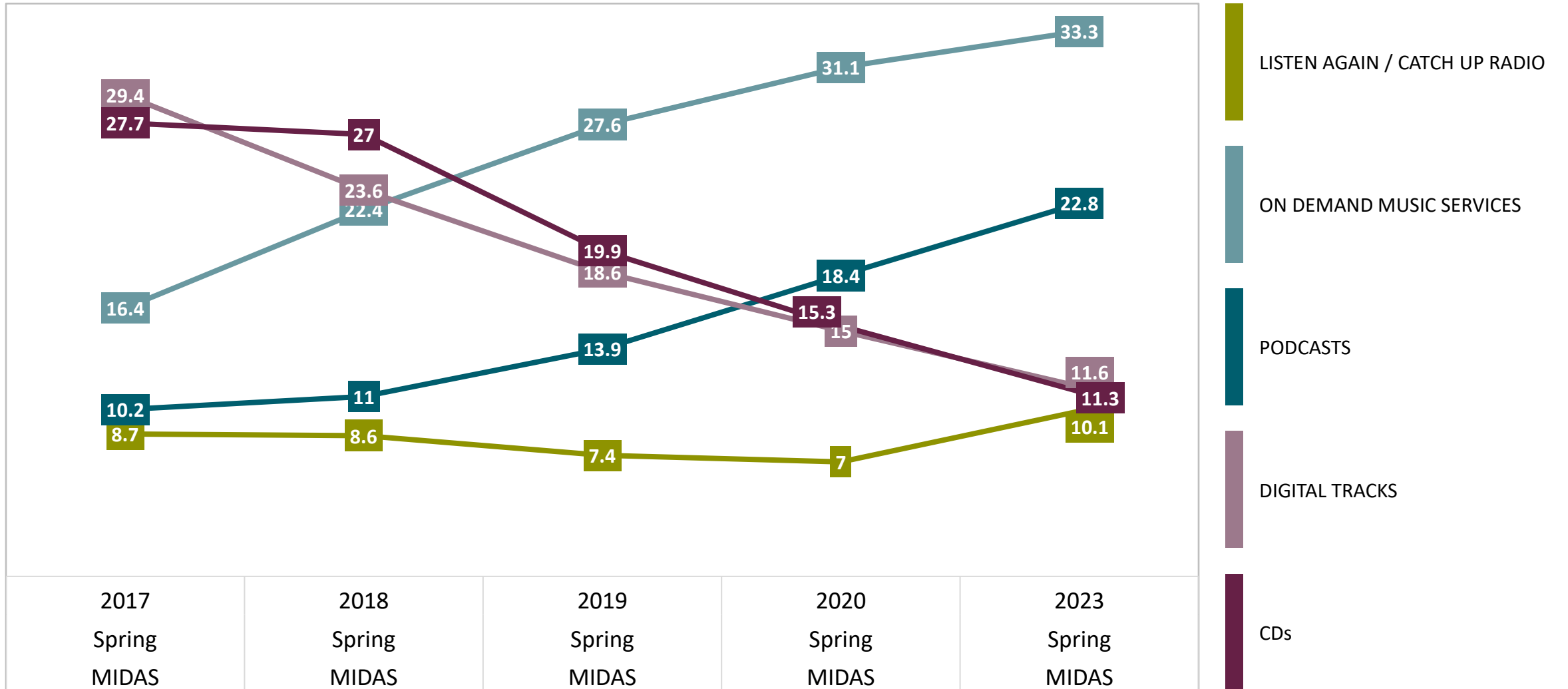
Audio Excluding Visual – Share % - By Demographic



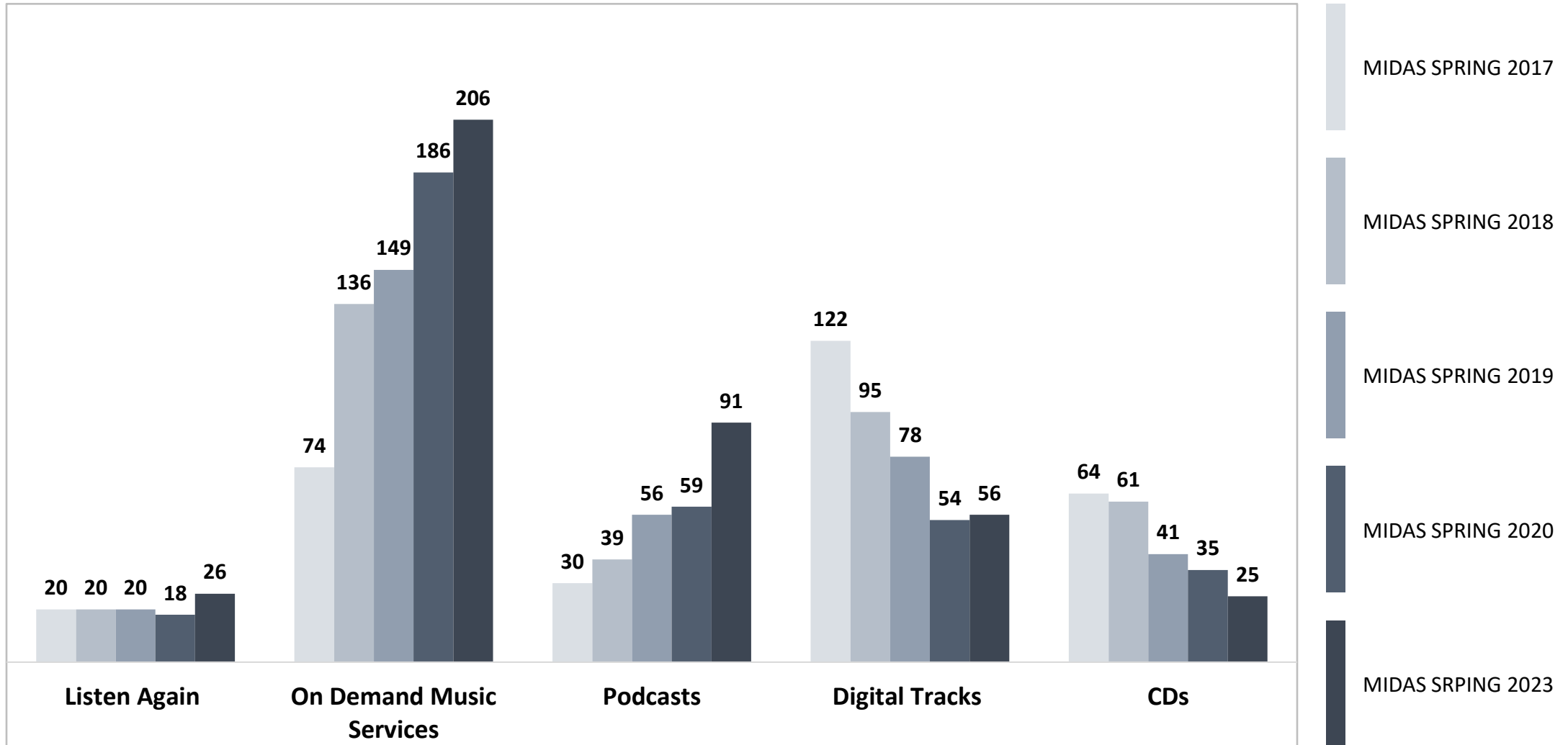
Device Excluding Visual – Share %



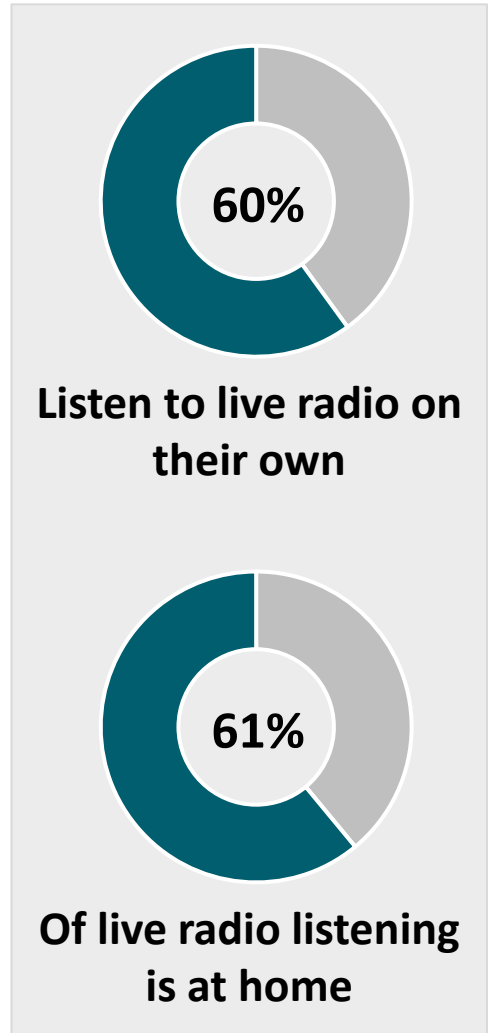
Audio Types Trends – Reach %



Audio Types Trends – Hours in Millions



Audio Types Trends – Hours in Millions



AUDIO TRENDS FROM THE UK

*Insights from
RAJAR &
MIDAS*



There is a clear acceleration over the pandemic period to usage of streaming and on-demand services.



There is also a clear difference in the usage of these services in the younger demographics, but there is significant usage across all demos.



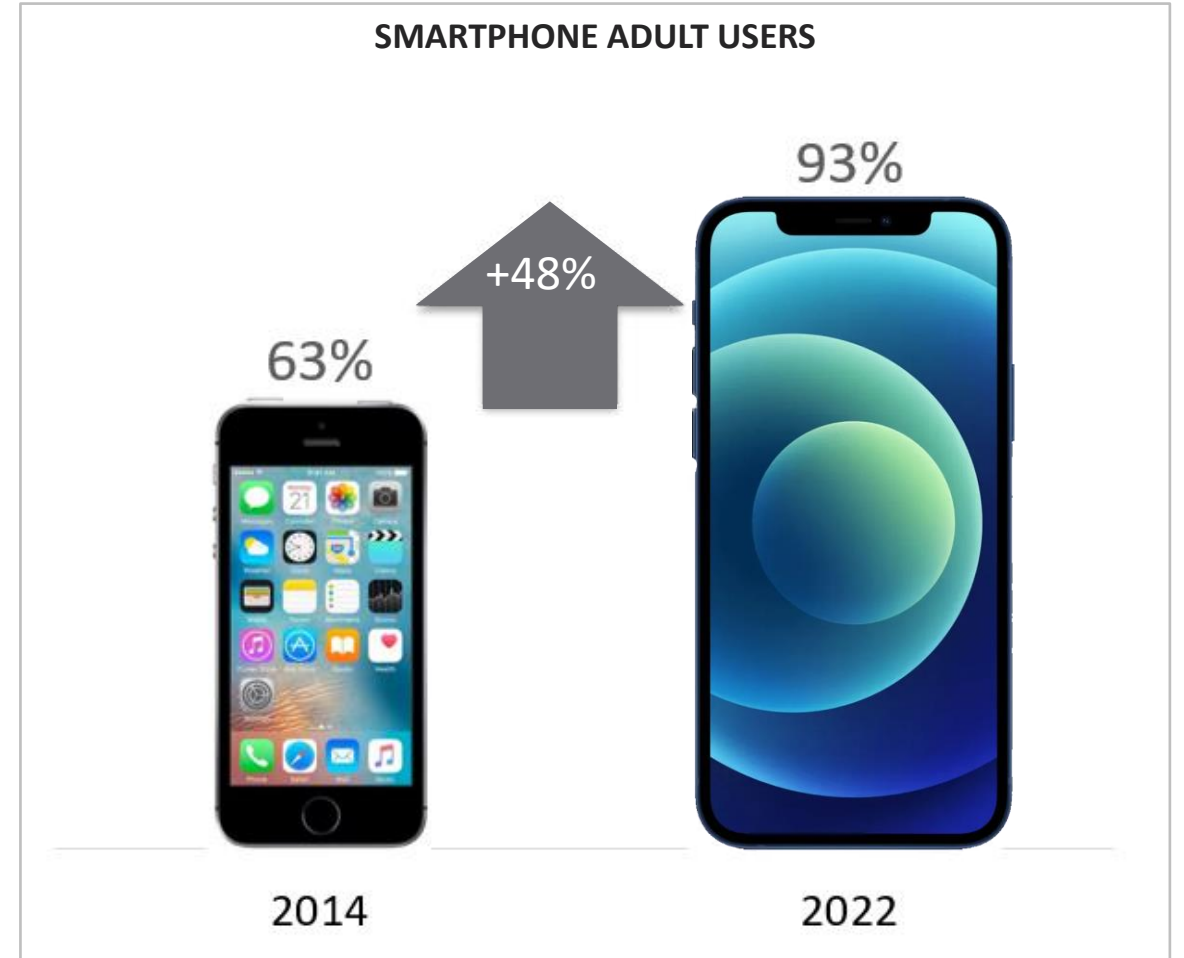
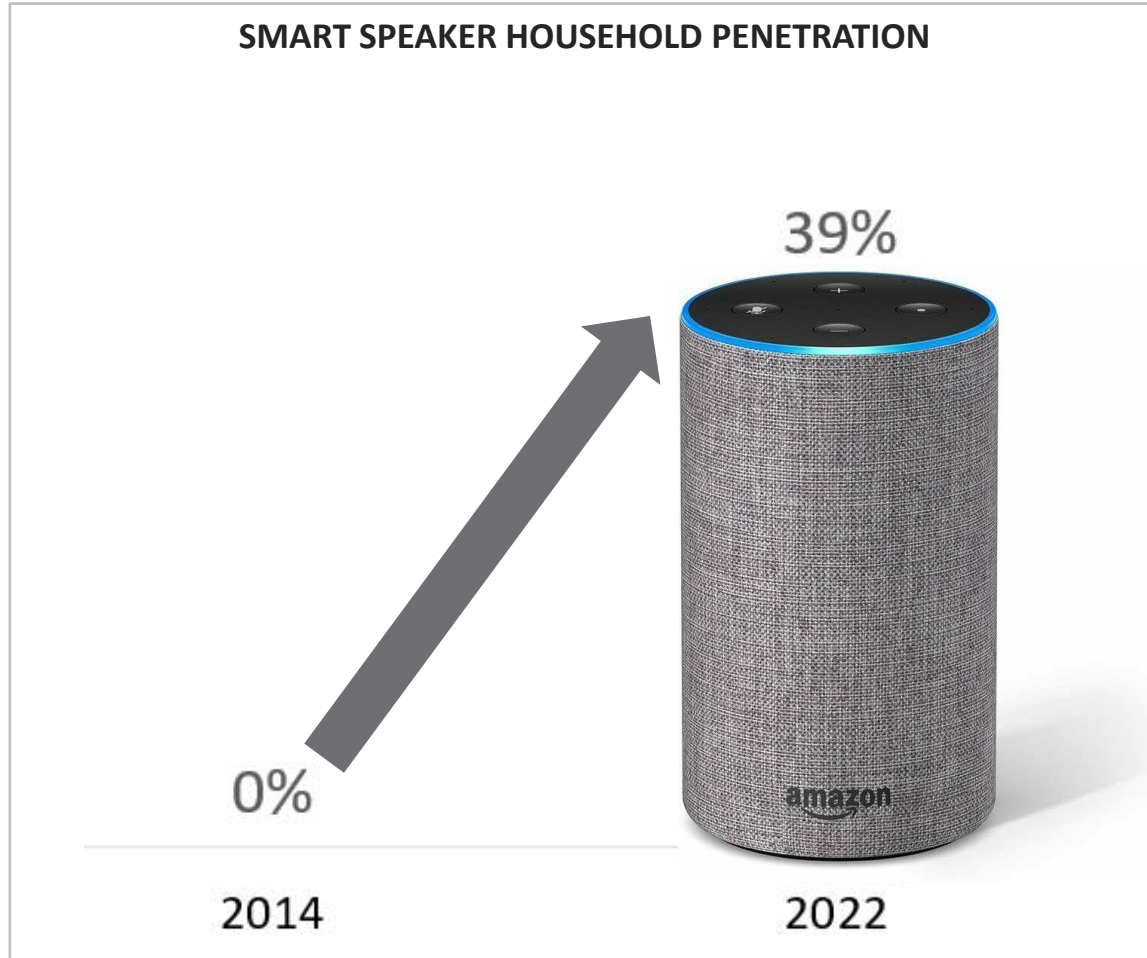
The change in working practices and location means that there is now nearly two thirds of radio listening taking place at home and also alone.



GENERATION AUDIO

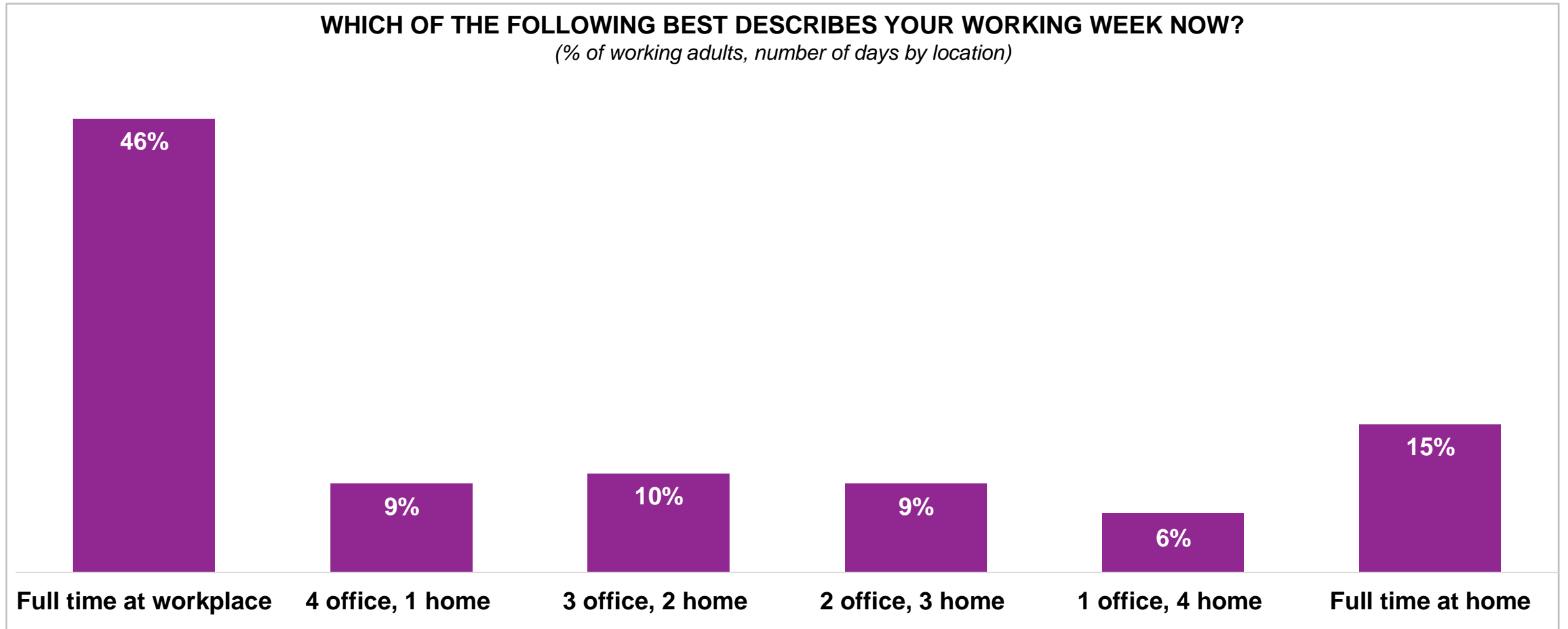
INCREASED PENETRATION OF CONNECTED DEVICES MAKES AUDIO EASIER TO ACCESS

Change in penetration of key audio devices since 2014



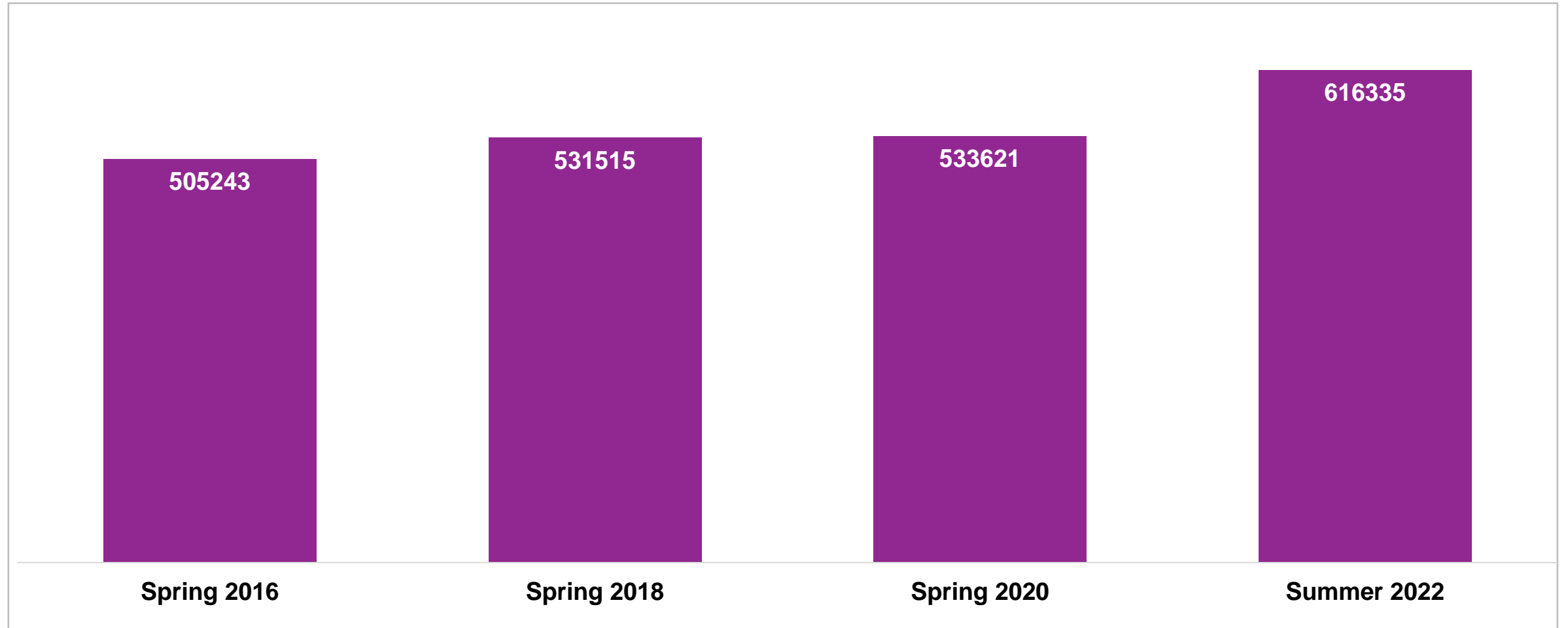
INCREASED AVAILABILITY OF AUDIENCES

Half of working adults work from home at least one day a week or more



Total commercial audio listening is growing...

Total weekly commercial audio listening hours (000s)



GENERATION AUDIO 2022

OBJECTIVES

1

Provide human context to the *continued growth in commercial audio listening*

2

Verify/quantify the scale of the 2014 need-states

3

Understand the role of different audio services across the need-states

4

Explore the opportunities for advertisers

5

Get a sense of what is shaping the future of audio

Base: weekly commercial audio listeners

QUALITATIVE

1-week auto-ethnographic study capturing listening behaviour

- have need-states evolved?

Audio listening qualitative data set

- 20 participants aged 15-54
- 155 audio days/ 397 audio moments
- Over 7 hours of video footage

QUANTITATIVE

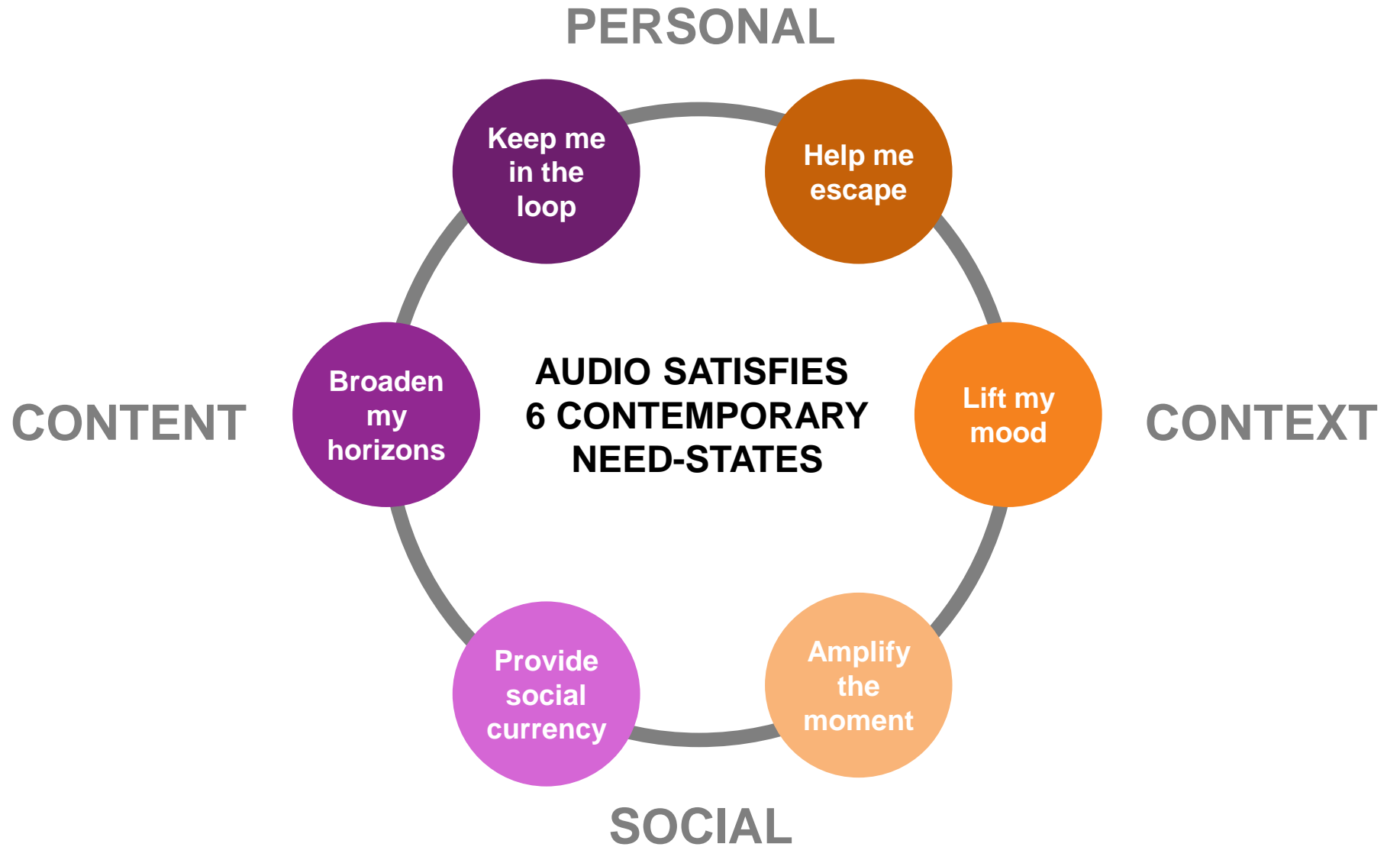
1-week diary task capturing specific data about individual listening occasions

- quantify scale of need-states/role of different audio formats within

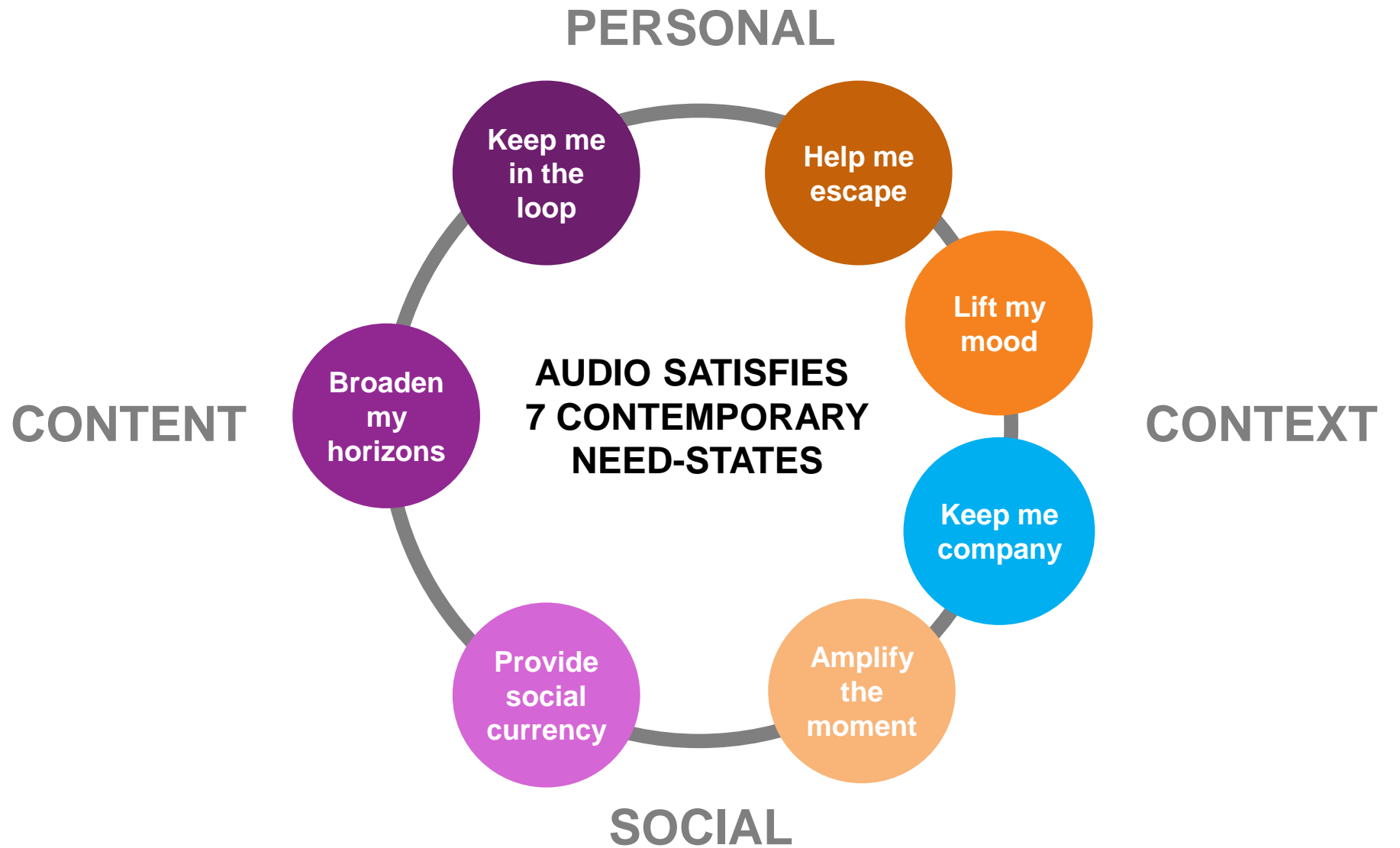
Large and robust quantitative data set

- Over 1,000 respondents (aged 15-54)
- C. 11,000 audio listening occasions captured
- Half a million commercial listening minutes

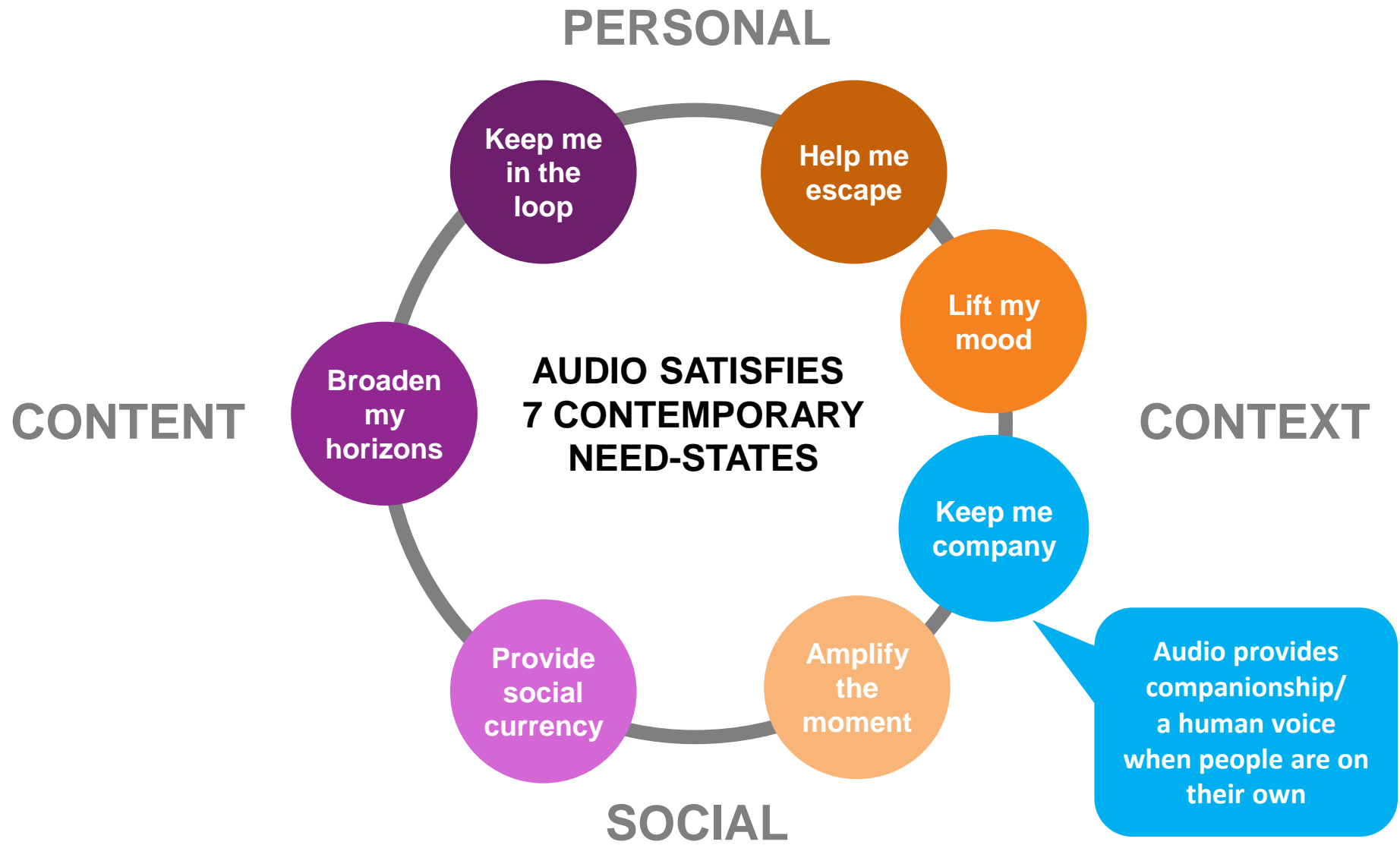
2014: 6 Need- states



2017: 7 Need- states

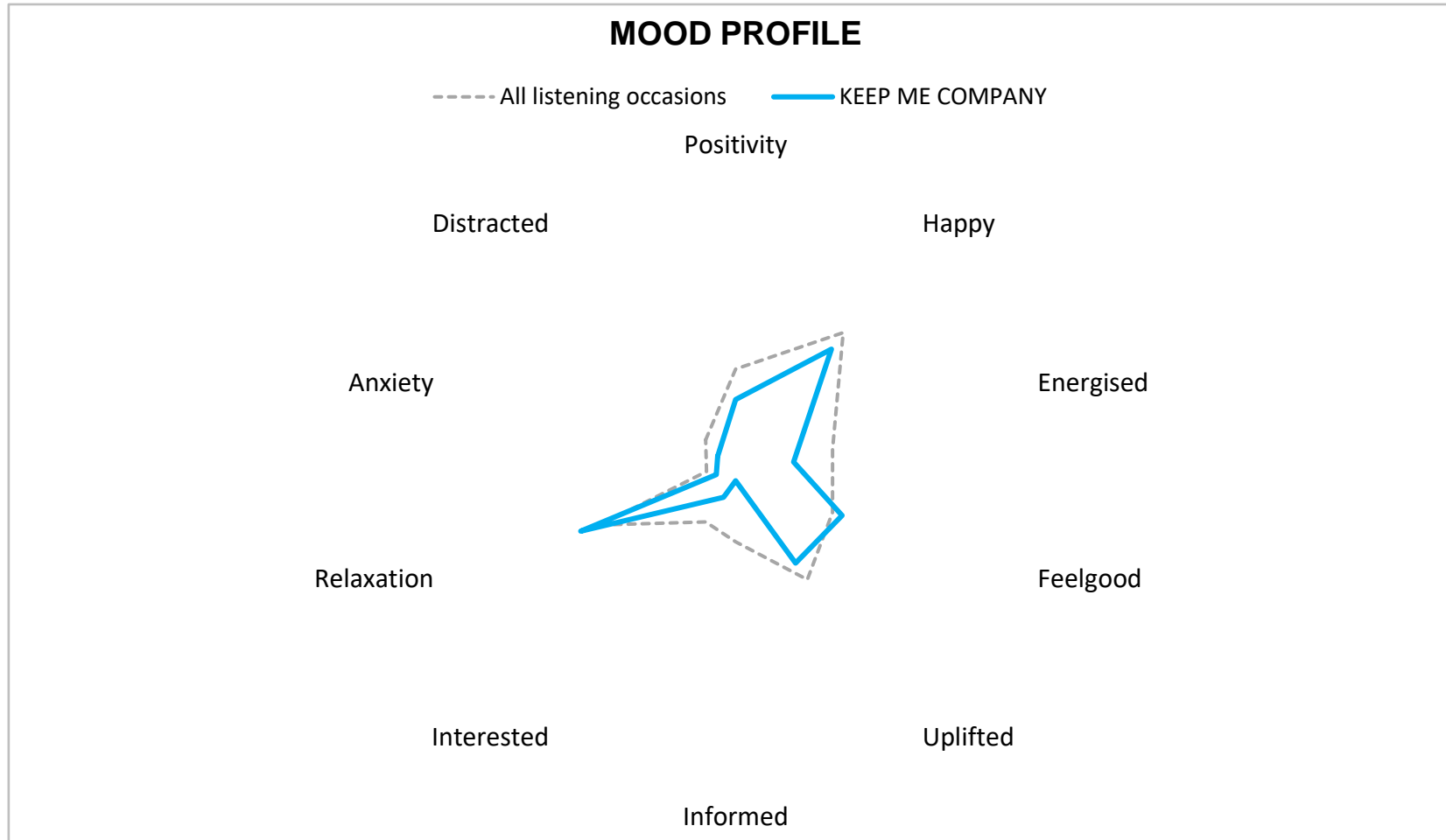


2017: 7 Need- states



KEEP ME COMPANY

“Radio for me is like a friend who’s always there - I always have it on in the background.”



Mainly Alone or with children



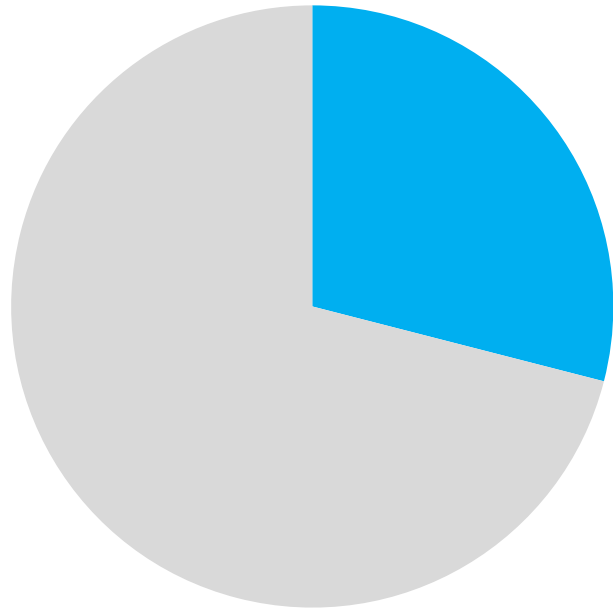
Working or studying / HH chores / childcare



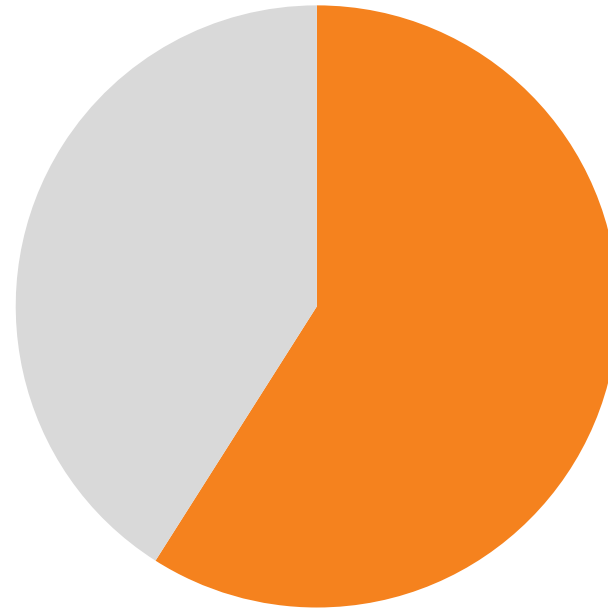
51% At home 27% in-car

Keep me company

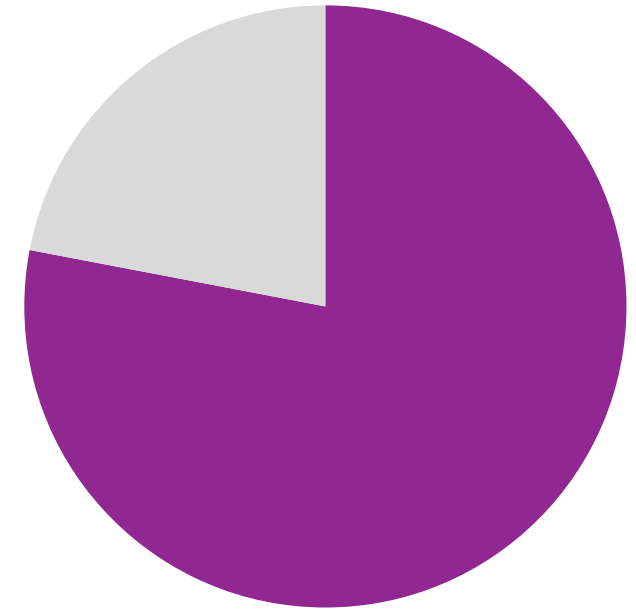
26% of total listening time



'Keep me company'
26% Share of total
listening time



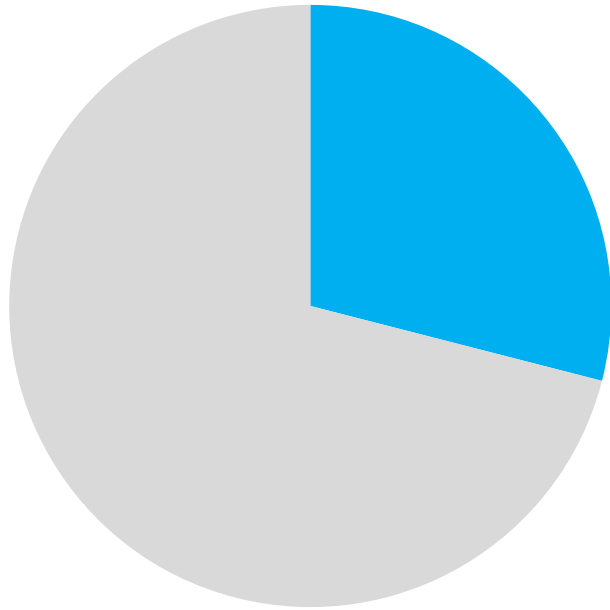
59% Weekly
Reach



78 mins avg. length
of listening occasions

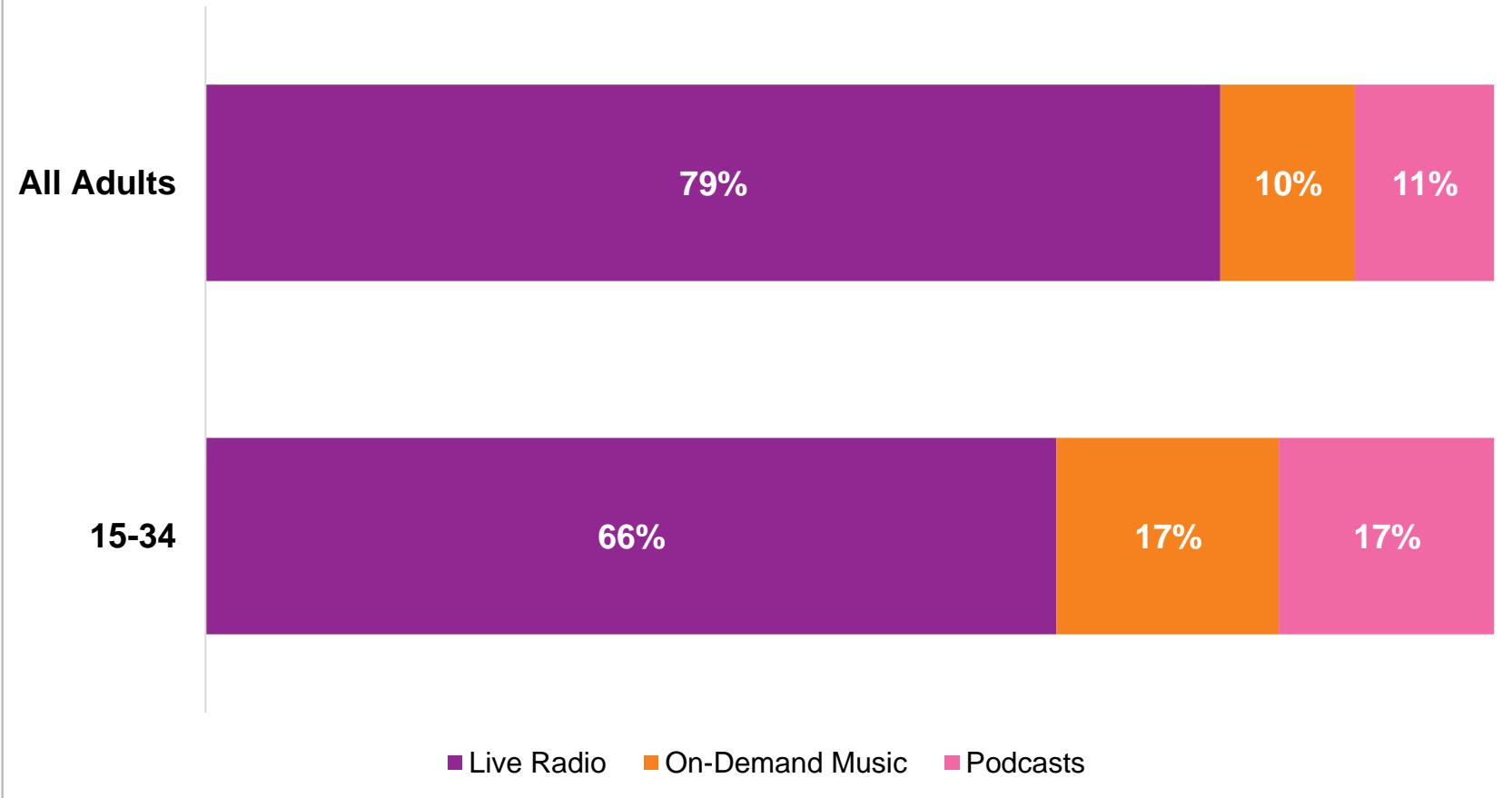
Keep me company

26% of total listening time



26% Keep me company

SHARE OF LISTENING WITHIN NEED-STATE BY AUDIO FORMAT



In summary:

Live radio and
on-demand
audio play
complementary
roles for
listeners

LIVE RADIO

Listening is driven by the need to feel
energised/uplifted
and more connected
with specific social groups/
to the wider world

PODCASTS

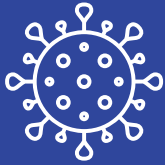
Listening is led by a
desire to learn new
things and develop
deeper understanding
of selected topics

ON-DEMAND MUSIC SERVICES

Listening is centred
around mood
management

AUDIO TRENDS FROM THE UK

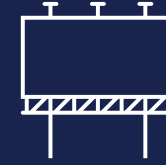
Insight from Radiocentre – Generation Audio



Covid has changed the way we work, with people spending more time working from home and less time commuting.



That said the overall levels of listening remain high and there is a new appetite for Live Radio and Audio services at home.



There are new advertising opportunities that resonate with the desire for “company” for commercial radio.


THANK YOU



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GAME CHANGERS

