

# The Irish Audio Landscape

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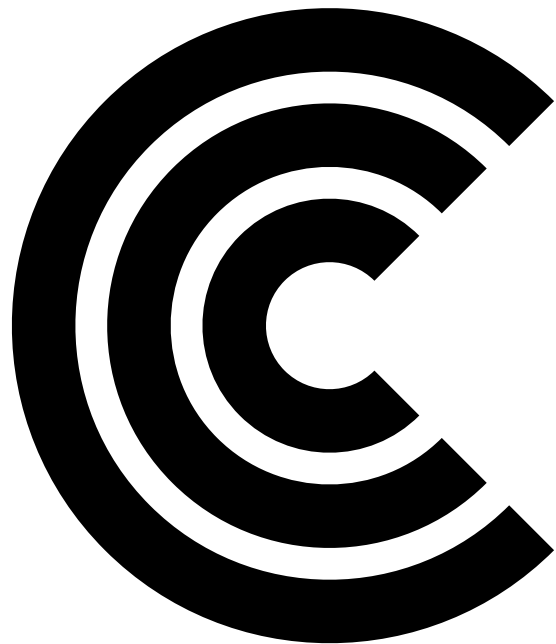
# Introduction

Audio is one of Ireland's most powerful and trusted advertising channels, delivering scale, emotional connection and measurable commercial impact across the full marketing funnel. While historically associated with short-term sales activation, extensive Irish and international evidence shows that audio also plays a critical role in long-term brand building, driving trust, fame and effectiveness.

This guide sets out the strategic role audio can play for advertisers, drawing on robust research from Radiocentre Ireland and leading effectiveness bodies. It outlines how audio builds reach, emotional engagement and brand fame; how it drives short-term response and sales; and how its contribution can be more accurately measured through modern attribution approaches. The document also explores the role of trust in audio advertising, the opportunities created by targeted and contextual messaging, and the growing importance of digital and addressable audio.

In addition, the guide provides practical guidance on how to plan and buy audio effectively — including campaign weighting, reach versus frequency, spot length, station selection, branded content and digital audio — alongside creative best practice and measurement frameworks to help advertisers maximise return on investment. Together, this document offers advertisers a clear, evidence-based roadmap for using audio as a core strategic channel for both short-term performance and long-term brand growth.

# 01— Why Use Audio?



## Why Use Audio?

Audio has historically been used by advertisers predominantly as a short-term sales medium—getting tactical messages to air quickly and building frequency. However, the high reach of audio, combined with its mood-enhancing effect on listeners across a range of listening occasions and locations, means that it is capable of playing a broader and more ambitious role for brands.

### Key roles for audio for brands

- 1: Brand Building
- 2: Short term Sales
- 3: Driving response
- 4: Building brand trust
- 5: Targeted Messaging

**1: Brand building**  
There has been much research undertaken that shows that when it comes to advertising, brands need to do two things to maximise sales: brands need to carry out long term (brand building) marketing and short term (tactical, sales-driven) marketing at the same time. Because most people are not in the market to buy any given product immediately at a specific moment in time, brands need to continue to build brand equity over the long terms so when potential customers are in the market to buy a particular product, their brand springs to mind.

Although audio has historically been used as a short term sales medium, there is a lot of evidence available that shows that audio is very effective at long term brand building. CampaignFX is the largest analysis of audio effectiveness ever undertaken in Ireland and it measures how brands using audio deliver on key metrics such as brand awareness, brand consideration and purchase intent.

*Search for the CampaignFX research on the Radiocentre Ireland website as an example of evidence.*

The advertising effectiveness research company, System1’s database shows that TV and radio ads have the same average Star Rating, predicting similar long-term effectiveness. Their conclusion is that audio ads are as likely to cause long-lasting brand effects as TV advertising.

*Search for Emotion’s defining role in audio advertising effectiveness on the Radiocentre Ireland website to find out more.*

All the evidence shows that successful long term brand building campaigns need to do three things:

- Reach a wide audience
- Use emotional advertising
- Create a level of brand fame

Reach a wide audience

Audio listening is ubiquitous

You can go the Radiocentre Ireland website where there will be sections on the JNLR and Irish Audio Report to allow you to analyse these reports in more detail.

- 90% of all adults and 85% of 15–34-year-olds listen to radio every week.
- 69% of 15-34 year olds listen to radio each weekday, while daily weekday listening levels for the hard to reach 15-24 year old cohort is also very impressive with 65% listening each weekday.
- Listening levels to local and regional radio continues to be very strong with over 2.2 million adults listening to their local or regional station every single weekday.
- The Irish Audio Report which measures all forms of audio listening reveals that there is universal listening to audio content with 97% of adults listening every week. Live radio dominates audio listening with a 76% share of total audio listening followed by music streaming with a 12% share while YouTube Music has a 6% share and podcasts a 3% share of audio listening.

Use emotional advertising to connect with consumers in an engaging way to ensure the brand message is remembered.

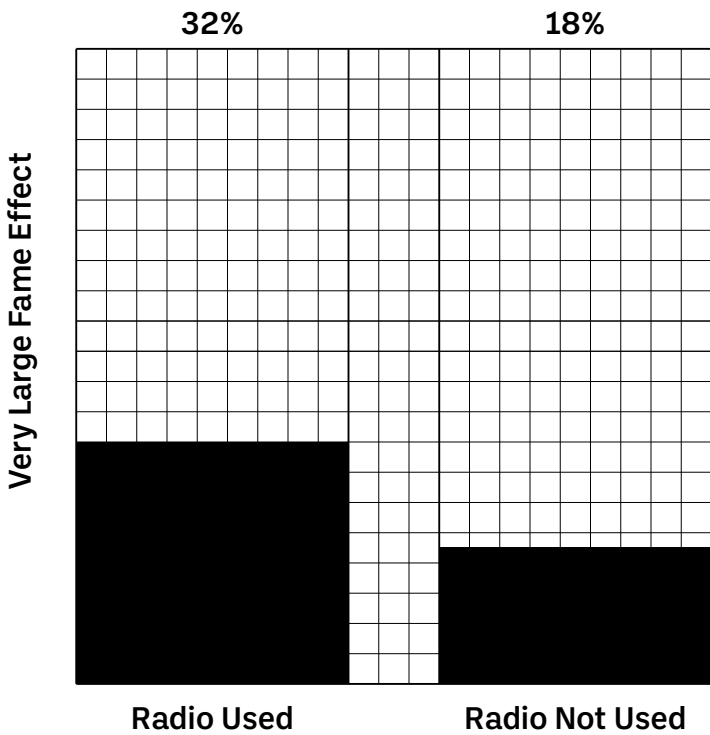
On average, when consuming audio, happiness & energy scores increase by 100% and 300% compared to when no media is being consumed. Audio is the highest scoring medium for happiness & energy in 70% of dayparts across the week. Music is inherently emotional, and research highlights the positive emotional influence that audio exerts over listeners. This mood-boosting effect of audio editorial extends into the ad break generating 30% higher levels of positive engagement with radio advertising.

Data from Amarach Research as part of a study commissioned by Radiocentre Ireland research showed that 67% of adults responded that audio entertains them, 41% said audio makes them laugh and 30% said audio improves their mood.

Create a level of brand fame.

Audio amplifies brand fame: analysis of the IPA Databank reveals that including audio as part of the mix significantly increases the chance of achieving brand fame, as the chart below shows ↓

Figure 1: Radio Amplifies Fame



2: Short Term Sales

The short-term, sales-response model of advertising is the way many advertisers use audio, and is based on its obvious strengths:

→ Audio offers short lead-times and relatively low cost production, making it ideal for promoting tactical advertising messages at short notice.

→ It is a highly cost-efficient medium – you get more impacts for your money.

→ It can be efficiently targeted via music genre, socio-demographics, and geographical region – as well as by time of day and day of week.

→ Audio delivers a larger audience than other media throughout the morning and is used by people to accompany tasks and activities across the day, making it easier for brands to reach people at relevant times and in relevant places.

Many case studies highlight the impact of audio advertising and promotions on Footfall, Response, and Sales. This responsive nature of audio means that it performs very strongly in terms of providing high ROI for advertisers.

A UK study involving 142 brands in 14 sectors covering over £2 billion in media spend between 2012-2023 found that of the ten media measured, audio ranks second in short-term return on investment (ROI) and third in overall ROI, beating all digital platforms It showed that overall, audio delivered £4.11 profit for every £1 spent.

You can access the full report on the Thinkbox website [www.thinkbox.tv](http://www.thinkbox.tv)

3: Driving Response

Numerous research studies conducted over recent years highlight the significant effects caused by audio advertising in terms of both demand generation and demand conversion.

Audio is second only to TV in terms of delivering long-term return on investment, well ahead of that delivered by online response channels.

In terms of converting demand, audio is proven to drive purchase consideration (+33%), increase brands online search (+45%) and deliver strong short-term return on investment – again well in excess of online response channels.

Search for the CampaignFX research on the Radiocentre Ireland website as an example of evidence.

But why do some businesses find it so difficult to attribute responses such as uplifts in web traffic to audio, given its proven capabilities in demand generation and conversion?

Capturing online response to offline exposure is complex compared to the relatively straightforward tracking methods of online/digital platforms. Also, audio’s unique

characteristic of being consumed alongside other activities means that people aren’t always immediately available to respond.

When they do respond, they are also less likely to visit websites directly using web addresses, turning to other channels such as search engines because, it’s easier than remembering a URL. These factors help explain why current attribution approaches struggle to accurately identify audio’s contribution to performance campaigns.

To aid advertisers in light of these complexities, Radiocentre Ireland has produced research that measures the ability of audio to drive traffic to websites. Using analytics data for a Sky TV and Broadband campaign that was active in Q1 2023, we were able to measure the link between audio activity and website visits. The Sky activity was a tactical, offer-led campaign - ‘Sky Sale - €38 a month’ that used a ‘Search Sky Sale’ call-to-action to drive traffic to a campaign-specific landing page.

This study discovered a strong relationship between audio advertising and online search behaviour - this is excellent news for advertisers. The results also showed that, for the reasons outlined above whereby listener are often doing other things while listening, audio ad response tends to be delayed, and that the full response to an audio ad campaign needs to be captured over a 24 hour period.

The results show that 72% of website visits to the Sky broadband sale landing page via search were directly attributed to the Sky audio ad campaign. But this figure was only calculated once the period of response time was extended to 24 hours to capture all the listeners who heard the commercial but didn’t respond to the ad until a later time that day/next day when there was a more convenient time to response.

Search the Radiocentre Ireland website for Sky attribution study to find out more about this research.

Following on from Radiocentre Ireland's research into how radio drives website traffic, Radiocentre UK commissioned research to look at how audio impacts website activity and the research also revealed significant shortcomings in the typical short-term campaigns. The study which involved detailed analysis of 1.6 billion multimedia impacts across 30 million web sessions, showed that audio advertising’s true performance effect is underestimated by an astounding 92% due to current attribution methods. When an audio spot is transmitted, only 8% of responses occur within the first 20 minutes. The following 92% of responses to date occur within 19 hours.

The research demonstrated that it takes a full 19 hours for the effects of each audio advertisement to be fully realized, challenging the conventional measurement approach that tries to capture responses in the first 20 minutes following transmission.

The research also measured the uplift in website sessions from all media and analysing 30 million web sessions, the research showed that audio accounted for 36% of the total uplift in website sessions driven by media activity and audio was twice as cost efficient as other media in driving website traffic.

*Search the Radiocentre Ireland website for the performance multiplier to access the full research report.*

#### 4: Building Brand Trust

According to the Edelman Trust Barometer, brand trust ranks as one of the top considerations when it comes to product purchases. The research suggests that the more channels people encounter a brand message in, the more likely they are to trust it. What are radio’s trust credentials – and how can these help brands? At a general level, the Eurobarometer Survey published by the European Commission shows how radio is the most trusted medium in Ireland and across most markets in Europe.

When it comes to advertising and brand trust, the IPA UK Databank highlights how campaigns that feature audio generate 4x the level of brand trust as those that don’t.

Finally, from a radio advertising-specific perspective, Radiocentre Ireland’s Campaign FX research shows that people exposed to audio advertising within a campaign are 72% more likely to trust a brand than people who are not exposed to audio advertising within a campaign.

*Search for the CampaignFX research on the Radiocentre Ireland website as an example of evidence.*

So, if building trust is important for your brand, all of the available data suggests that audio is the ideal place to be heard.

#### 5: Targeted Messaging

Audio is top of the list as the most flexible medium as it can be used to target audiences in a variety of ways:

**Geographically:** An important factor for many advertisers is selecting stations that focus on specific locations. With a range of national, regional and local stations covering all parts of Ireland, audio is highly flexible geographically – providing opportunities for all types of advertisers to precisely target important locations efficiently.

**Demographically:** Audio consists of a wide range of stations with a variety of content and playlists attracting different types of audiences. JNLR data allows advertisers to analyse which stations are best for reaching their specific target audience.

**Time of day/day of week:** Audio is a predominantly live and linear medium, meaning that ads play out in real time. This allows advertisers to time their advertising to reach people on specific days of the week and/or specific times of day to enhance the relevance and efficiency of certain messages, where appropriate

**Contextual Research:** demonstrates that reaching people at relevant times can help enhance cut through and effectiveness of a campaign. As audio is available in a wide range of devices and doesn’t require primary attention, listeners often use audio to accompany a range of tasks and activities across the day, from the school run to working/studying through to childcare, allowing advertisers to target audiences in specific contexts. Hear and Now research from Radiocentre UK looks specifically at how targeting people at relevant times helps turbocharge ad effectiveness.

*Search Hear and Now research on the Radiocentre UK website to access the full report on this research.*

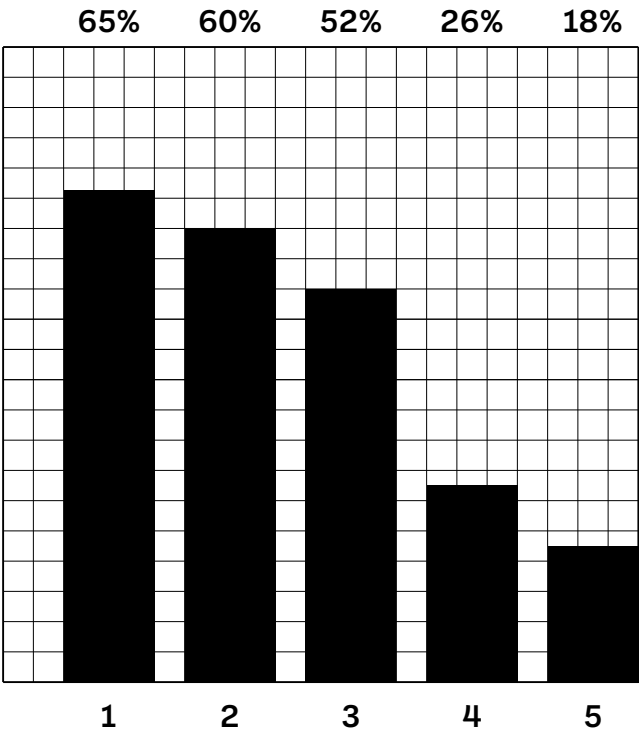
**Addressability:** With more listening taking place through connected devices, all stations can offer individualised personal data-led targeting of listeners to their streamed content. Technology allows advertisers to target based on factors such as specific location (eg city, town), time of day, weather, listening device (i.e. smart speaker, mobile phone, PC, tablet etc) and context. A great example of this is the campaign for Irish Life’s MyLife App, where dynamic technology was used to generate 23,688 possible variations of the Irish Life audio ad to ensure each message was tailored to the specific situation that was relevant to the listener (day and time of year, time of day, location, device used to listen).

*Go the case study section of the Radiocentre Ireland website to access full details on the Irish Life Case Study.*

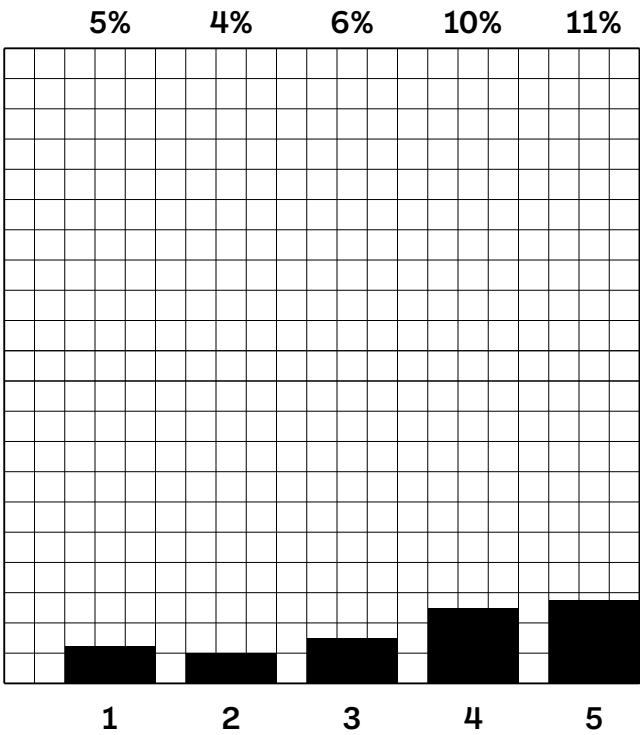
Figure 2 — Trust in Media

1	= Radio
2	= TV
3	= Written Press
4	= Internet
5	= Social Media

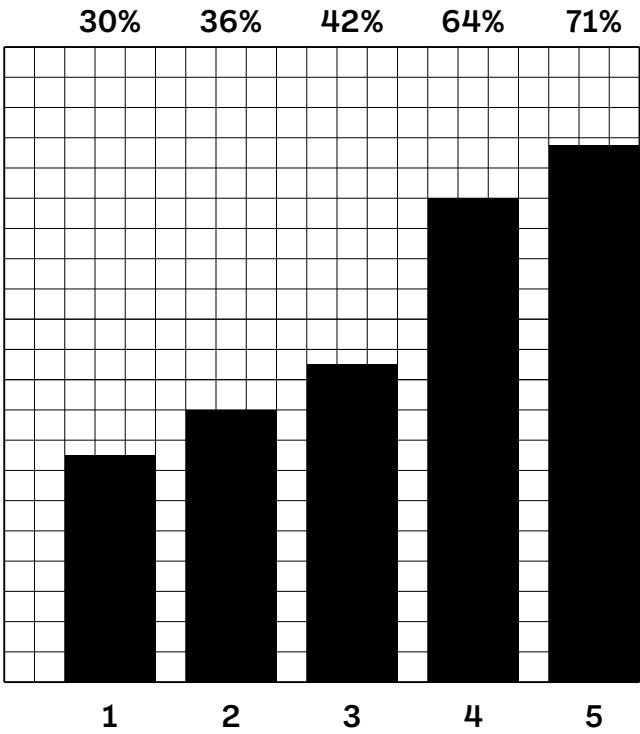
Tend To Trust



Don't Know

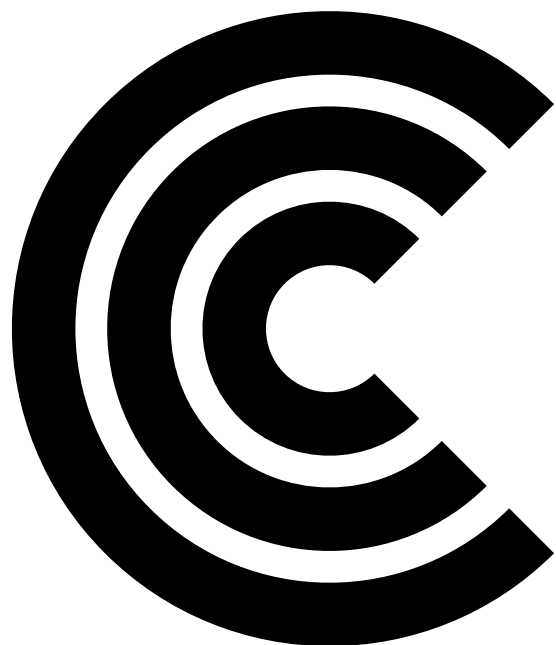


Tend Not To Trust



# 02— How to Use Audio

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## Using spot advertising

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Spot airtime can be bought across different day parts and days of the week depending on the objectives of your campaign.

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### Setting campaign weights

There are really two ways of considering campaign weight planning: weekly reach and weekly frequency.

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### Weekly reach

Weekly reach is the percentage of your target audience that will hear an ad within a week. The richest data we have about audio campaign planning is from Radiocentre Ireland’s CampaignFX research which shows that generating maximum WEEKLY REACH is the best way to optimise audio return on investment. In the study when weekly reach data was modelled against uplifts from audio, the results demonstrated significantly improved returns at the higher coverage levels and support optimising weekly coverage. It challenges the traditional view that audio is “a frequency medium”, and suggests that maximising weekly reach is the best way to attain optimum effectiveness.

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### Weekly frequency

On the other hand, if you are looking for guidance about weekly frequency then the learning is based less on data and more on historical practice. It is generally accepted common practice, when planning an average

weight campaign, the target audience should hear the ad campaign at least 4 times over a 2/3 week period. Lighter weight campaigns should ensure the target audience hear the commercial at least 3 times over a 2/3 week period while a heavy weight campaign (eg product or campaign launches ) will ensure the target audience will hear the commercial at least 6 times over a 2/3 week period.

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### Summary: reach or frequency?

Most recent advertising industry research (e.g. the IPA’s ‘The Long and the Short of It’ by Les Binet and Peter Field; ‘How Brands Grow’ by Byron Sharp) highlights the fundamental importance of reach for campaign success. This makes sense – if you plan the perfect weekly frequency but only a small proportion of the population are exposed to this then the campaign effects will be limited. High reach gives the campaign the optimum chance of wider success.

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*In this context, it makes sense to prioritise weekly reach over frequency unless there are very specific tactical reasons to do otherwise.*

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### What is the optimum spot length?

Whilst the most common spot lengths are 30 and 40 seconds, spots can in effect be any time length of 10 second increments up to 60 seconds or even longer. Research suggests that longer time lengths are more effective at generating recall but, because longer commercials cost more, they do so less efficiently than



shorter time lengths. Ultimately this boils down to the creative approach i.e. how long does the ad need to be to get the message across effectively. It can be helpful to include a recommended time length in a creative brief, if only to help manage budgets from both a media and budget perspective, but it's worth being open to deviating from this for the right creative idea.

**How long should my radio campaign be?**

The standard campaign length for most individual campaigns is around four weeks. However, what is right for your campaign will depend on the objectives. Is this about maintaining a constant level of awareness for an existing brand? In which case consider running over as long a period of time as budget will allow. Or is it about achieving maximum awareness as quickly as possible for a new brand launch or tactical offer? In which case, consider a shorter heavier burst of activity. Bear in mind it takes time for a new campaign to become established so we would recommend a minimum of four or five weeks to ensure cut-through.

**Selecting stations**

In general people seek to use stations that reach a high percentage of their chosen target audience as efficiently as possible. Traditional means of measuring station performance (weekly reach, average hours listened by the target) give some indication of what coverage might be achieved, but little indication of the efficiency. For this, the advertiser needs to look at the station's profile i.e. what proportion of the total listening to the station does the target audience represent. The JNLR research provides this data.

→You can go the Radiocentre Ireland website where there will be sections on the JNLR to allow you to analyse the JNLR reports in more detail.

Another important factor for many advertisers is selecting stations that focus on specific locations. With a range of national, regional and local stations covering all of Ireland, audio is highly flexible geographically – providing opportunities for all types of advertisers to precisely target important locations efficiently.

**Using Branded Content**

Advertising on commercial radio isn't just about the spot ads that you hear during the traditional ad break. Branded Content allows advertisers to take advantage of various other creative opportunities and partnerships that stations are able to offer and benefit from the close relationship between listener and presenter.

**What is branded content?**

Branded content is any on-air activity that takes place outside of the spot advertising break e.g. sponsorships, promotions and advertiser-funded programming elements. The regulations permit for brands/products to be endorsed on-air within radio programming by presenters or brand ambassadors – provided it is transparent to listeners that a commercial arrangement is in place.

**Branded content benefits**

Branded content allows advertising a greater level of integration into station content through the development of new and creative mechanics. Station content has always had high levels of trust, and branded content allows advertisers to benefit from the unique relationship stations enjoy with millions of listeners every day. This means that station branded content can deliver unique and powerful partnerships in ways that no other broadcast medium can.

**Briefing branded content**

The best branded content projects require the input of people on both the sales and programming side of the station. It is vitally important therefore that everyone involved in the development process has a clear understanding of the strategic background to the project: in particular, about the brand and what it aims to achieve. As with most things in the marketing world, this places a huge responsibility on the quality of the brief.

A good brief should provide rich context and clear direction to help inspire great ideas but allow plenty of room for creative development. In particular, there are three main characteristics that help to enhance radio branded content briefs:

**Simplicity**—keep the brief clear and concise and avoid unnecessary marketing speak/jargon. Try to limit information to that which is relevant to or will help in the development of the radio branded content idea. Allow room in the brief for the station groups to develop ideas.

**Focus**—ensure that the brief is very clear about the marketing challenge that the branded content needs to address, and how this relates to other marketing activity.

**Time**—allow enough time for the station groups to consider the brief and develop ideas before responding. In general, a time frame of two weeks between brief and response should be enough to allow the station to involve the right people in the development process.

→The Failte Ireland Daycations is a great example of the effective use of branded content. Go to the case study section of the Radiocentre website to access full details on the Failte Ireland Daycations Case Study.

**Using Digital Audio**

The rise in listening through connected devices has created huge commercial opportunities in the form of digital audio advertising placed into streamed or downloaded audio content including broadcast radio, on-demand music services, and podcasts.

Research highlights how live radio and on-demand services play complementary roles for the listener – and they can also do so for advertisers. Using both in tandem can help optimise the effects of a media campaign.

→Go to the Radiocentre Ireland website ad search for needstate research to access more details on this study.

Because digital audio is delivered over connected devices, digital audio can use data to target a more precisely defined audience and influence the content of the commercial that the listener hears via dynamic creative.

All stations can offer individualised personal data-led targeting of listeners to their streamed content. Technology allows advertisers to target based on factors such as specific location (eg city, town), time of day, weather, listening device (i.e. smart speaker, mobile phone, PC, tablet etc) and context. A great example of this is the campaign for Irish Life's MyLife App, where dynamic technology was used to generate 23,688 possible variations of the Irish Life audio ad to ensure each message was tailored to the specific situation that was relevant to the listener (day and time of year, time of day, location, device used to listen).

*Go the case study section of the Radiocentre Ireland website to access full details on the Irish Life Case Study.*

## Creative

Great writing, stand-out performance and quality sound design are key to creating effective audio advertising. The creative idea and the quality of your ad can have a huge impact on its commercial success. Advertising studies show a strong link between creative excellence and effectiveness. The following are tips to help make great audio ads.

### 1: Connect emotionally with the listener

People are busy and they don't really seek out advertising, many pay to block out advertising (ad blockers, Spotify Premium, YouTube Premium etc). So, brands need to create advertising that is interesting and entertaining, advertising that appeals to people's emotions. Audio ads should contain characters with vitality, a story should unfold in an interesting way, there should be a clear sense of place. Distinctive accents, clever playing with words, unexpected contextual noise, and sounds of the living are key features that make audio ads more interesting. Unlike visual media, which presents an image outright, audio invites listeners to create their own mental imagery. This immersive storytelling engages the brain on a deeper level, making messages more memorable and impactful.

### 2: Create with the listener in mind

Audio can put the listener at the centre of brand communications. Commercials on TV, video, out of home, online show other people interacting with a brand, with audio, you can easily make the listener the central character to intrigue and involve the listener. Make audio ads relatable with creative strategy that speaks to the listener directly.

### 3: Stand out but be consistent

Ads that stand out from the category, and other audio ads, get more attention and result in listeners feeling greater emotional intensity. However, it's important for audio ads to be consistently distinctive, i.e. sounding different from other brands but consistently sounding like themselves. Fluent device is a term that is rising in popularity, which means developing your audio brand assets, your brand

sound, sonic, jingle, voice, character all the things that makes your brand sound like your brand. And keep them consistent.

### 4: Embrace the power of music

Sir John Hegarty, a luminary in the advertising world, has articulated the significance of sound in advertising. He emphasized that music is "the most powerful selling tool ever." Music activates our limbic systems, accessing people's emotions and memories and no visual stimulus affects us quite as strongly. A well-crafted ad with the right combination of voice, music, and sound effects can transport listeners, making them feel, experience, and most importantly, act. Music brings audio ads to life by attracting attention and creating emotion. Using music generally caused a huge jump in long-term effectiveness. However, melodic music is more powerful than repetitive, rhythmic soundtracks. Choose music listeners can hum to and lodge in their memory

### 5: Brand early and brand often

Without the advantage of visual cues, introducing the brand's distinctive audio assets earlier in the ad, ideally within the first few seconds and then repeating throughout, can help listeners process the ad more effortlessly. This doesn't mean just repeating the brand name again and again but instead utilising the brands full audio assets- be that strapline, character voices or music. This can help enhance both short-term and long-term ad effects.

*You can find out more about creative effectiveness by searching for the Listen Up research on the Radiocentre Ireland website.*

## Measuring Your Campaign

If you are using radio either as a one-off test campaign or as part of a longer term strategy it is important to consider how you are going to measure the effects of your investment. Not only will this provide you with tangible outcomes resulting from your activity it can also help you understand how to optimise any future radio investment. In today's dynamic media landscape, audio advertising—both traditional radio and digital streaming—continues to play a vital role in marketing strategies. Whether you're broadcasting to commuters on FM radio or targeting niche audiences on platforms like Spotify, Pandora, or podcasts, measuring the effectiveness of these campaigns is key to optimizing performance and proving ROI.

### 1: Set Clear Objectives

Before measuring success, define what success looks like. Are you aiming to increase brand awareness, drive website visits, boost sales, or promote app downloads? Your goals will determine which metrics matter most.

#### Common objectives include

- Brand Awareness
- Lead Generation
- Sales Lift
- Website/App Traffic
- Engagement with Audio Content

**2: Use Key Performance Indicators (KPIs)**

Depending on your platform and objective, your KPIs may include:

**For broadcast Radio**

→ Reach & Frequency: How many people heard your ad, and how often?

→ Gross Rating Points (GRPs): A standard radio metric indicating audience reach and ad frequency.

→ Brand Lift Studies: Pre- and post-campaign surveys to track changes in awareness or perception.

→ Call Tracking & Promo Codes: Use unique phone numbers or discount codes to attribute responses directly to the ad.  
Foot Traffic Attribution: Some services can track location data to measure in-store visits after hearing a radio ad.

**For Digital Audio**

Impressions & Listen-Through Rates (LTRs): How many people heard the ad and how many listened to the end?

→ Click-Through Rate (CTR): For interactive audio or companion banners.

→ Attribution Analytics: Track actions users take after hearing the ad (website visits, sign-ups, etc.) through pixel-based tracking or device ID matching.

→ Conversion Rate: Number of desired actions taken per exposure.

→ A/B Testing: Test different ad creatives to see which resonates more.

**3: Leverage Attribution Technology**

For digital audio, sophisticated attribution tools are available to link ad exposure with user behaviour:

→ Pixel tracking on landing pages.

→ Device ID matching to connect ad impressions to actions across devices.

→ Geo-fencing to measure physical store visits after audio ad exposure.

**4: Use Post-Campaign Surveys**

Especially effective for both radio and digital audio, post-campaign surveys can measure:

- Brand recall
- Message retention
- Purchase intent
- Sentiment changes

Surveys help capture qualitative feedback that traditional analytics might miss, especially around brand perception.

**5: Analyse Incrementality**

To isolate the impact of your audio campaign, use techniques like:

- Controlled testing (exposed vs. unexposed groups)
- Pre-post comparisons (brand awareness, traffic, or sales before and after the campaign)
- Market-level analysis (comparing regions with and without ad exposure)

**6: Combine Data Sources for a Holistic View**

Integrate data from your CRM, website analytics (Google Analytics, Adobe), POS systems, and third-party tracking to gain a full picture of campaign effectiveness. Omnichannel analysis helps attribute outcomes more accurately, especially for campaigns that use a mix of traditional and digital audio.

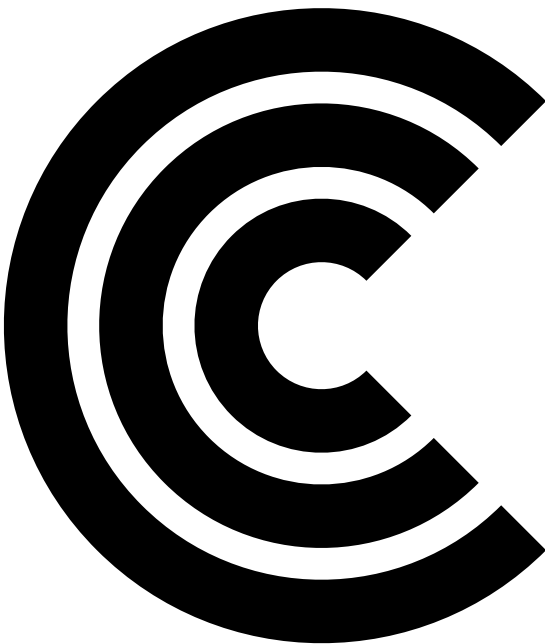
Measuring the effectiveness of radio and digital audio advertising requires a blend of traditional metrics, digital analytics, and strategic testing. With the rise of programmatic audio and sophisticated tracking tools, advertisers now have greater power than ever to prove audio's impact and refine their approach for future success.



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# The Audio Landscape

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## Overall Audio

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The Irish Audio Report 2024 reports that there is almost universal listening to audio content in Ireland with 97% of the adult population tuning into audio each week. Live radio continues to be the dominant form of listening – 90% tune into live radio on a weekly basis compared to 55% to on-demand, online audio.

In terms of daily listening patterns (defined as average ‘yesterday’ listening) overall, live radio is the number one choice among the population, by a significant margin. Indeed, it is the leading format across all age cohorts. Daily listening to live radio now stands at 78% compared to 24% for music streaming, according to The Irish Audio Report 2024. However, for the younger 15-24-year-old cohort, on demand online audio accounts for 55% of their listening. Irish people are digitally connected with significant levels of ownership of technology. This technology facilitates access to media content at home and on the go.

The Irish Audio Report shows that smart phone ownership has reached a high of 92%. Unsurprisingly, almost all 15-24’s own a smart phone now whereas ownership levels are lowest among the older 65+ group (72.5%). Further empowering audiences on the move, we see that more than half of the population (55%) own Bluetooth enabled wireless headphones.

There has been considerable growth in ownership of Voice activated technology or smart speakers such as Alexa or Google Home. When this was first measured in 2018, just one in ten people owned a smart speaker. This now stands at 44% in 2024.

In-home is the most common location for listening to audio with 71% of respondents to The Irish Audio Report stating that they listen at home. In-car listening is the next most common location. More than two-in-five people (43%) listen in the car. More than one-in-ten respondents (11.2%) consume audio content while in work, school or college, and this is most prominent among those aged 15-24 (16.0%) while 8.3% listening on the go. You can find more details about the overall audio environment in Ireland by accessing The Irish Audio Report 2024.

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*You can go the Radiocentre Ireland website where there will be sections on the JNLR to allow you to analyse these reports in more detail.*

Irish Radio Broadcasters

RTÉ, the national semi state broadcaster operates 4 FM stations in Ireland, RTE Radio 1, 2FM, RTÉ Lyric FM and RTÉ Raidió na Gaeltachta. The independent sector operate 33 commercial FM stations in Ireland. All these stations are available on FM or on IP platforms such as pc, mobile phone, smart speakers and internet enabled car entertainment systems. Both RTÉ and the independent stations also broadcast a range of digital only radio stations.

The regulator Comreg has commissioned FáilteDAB to carry out a DAB+ trial in Dublin and surrounding areas for 12 months from April '25 to April '26. Digital Audio Broadcasting (DAB) is designed for delivery of high-quality digital audio from terrestrial transmitters. DAB+ is distributed to listeners by means of transmitted signals in a similar way to the analogue FM service. DAB+ technology allows for a greater range of stations to be provided to the listener. Licensed radio operators will be allowed to participate in the trial.

National Stations

- RTÉ Radio 1
- RTÉ 2FM
- RTÉ Raidió na Gaeltachta
- RTÉ lyric FM
- Today FM
- Newstalk

Regional Stations

**Beat 102 103**  
Counties Carlow, Kilkenny, Waterford, Wexford and south Tipperary.

**iRadio**  
Counties; Cavan, Donegal, Galway, Kildare, Leitrim, Longford, Louth, Mayo, Meath, Monaghan, Offaly, Roscommon, Sligo, Westmeath and north-east County Laois.

**SPIN South West**  
Counties Clare, Limerick, Kerry.

Multi-City Stations

**Ireland's Classic Hits Radio**  
Counties Clare, Cork, Dublin, Galway, Kildare, Limerick, Meath and Wicklow.

Local Dublin

- 98FM
- FM104
- Q102
- Radio Nova
- SPIN 1038
- Sunshine 106.8

Local Cork

**C103**  
**Cork's 96FM**  
**RedFM**

Connacht

**Galway Bay FM**  
west County Galway.

**MidWest Radio**  
County Mayo.

**Ocean FM**  
County Sligo, north County Leitrim and south County Donegal.

**Shannonside FM**  
County Roscommon, south County Leitrim, east County Galway and north-west County Longford.

Leinster (excluding Dublin)

**East Coast FM**  
County Wicklow.

**KCLR 96FM**  
Counties Carlow and Kilkenny.

**KFM**  
County Kildare.

**LMFM**  
Counties Louth and Meath.

**Midlands 103**  
Counties Laois, Offaly, Westmeath and south-east County Longford.

**South East Radio**  
County Wicklow.

Munster (excluding Cork)

**Clare FM**  
County Clare.

**Live 95**  
County Limerick.

**Radio Kerry**  
County Kerry.

**Tipp FM**  
County Tipperary.

**WLR FM**  
County Waterford.

Ulster

**Highland Radio**  
north County Donegal.

**Northern Sound**  
Counties Cavan and Monaghan.

**Main Radio Groups**

Outlined below is a list of the main radio groups operating in Ireland.

**Bauer Media Group**

Beat 102–103  
iRadio  
98FM  
Newstalk  
Red FM  
Spin 103.8  
Spin Southwest  
Today FM

**RTÉ**

RTÉ Radio 1  
RTÉ 2FM  
RTÉ Raidió na Gaeltachta  
RTÉ lyric FM

**ONIC**

FM104  
Q102  
Cork's 96FM  
C103  
LIVE 95  
LMFM

**Bay Broadcasting**

Classic Hits  
Radio Nova  
Sunshine FM  
Galway Bay FM

**Radio Kerry**

Radio Kerry  
Shannonside  
Northern Sound

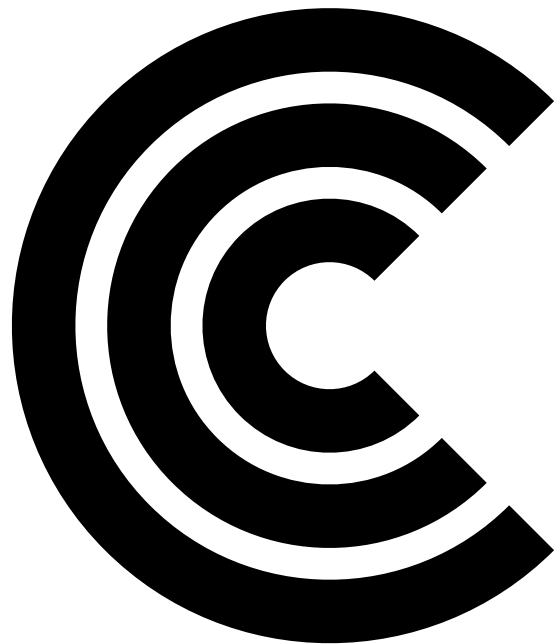
**Tindle Radio**

Midlands 103FM  
Southeast Radio



# 04— Glossary of Terms

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**Amplitude Modulation (AM)**—The waveband on which most ‘Gold’ stations broadcast. Also known as Medium.

**Active Sessions (AS)**—Number of sessions that were active within a given time period.

**Adserve**—Radio JNLR analysis system involving audience analyser and agency planner platforms.

**Amazon Music Unlimited**—Amazon Music Unlimited is a premium music subscription service.

**Apple Music**—Apple Music is a music and video streaming service developed by Apple Inc. Users select music to stream to their device on-demand, or they can listen to existing, curated playlists.

**Audience**—The population or target group:  
A) reading a publication or a group of publications  
b) listening to a radio programme/station or a selection of radio programmes/stations.  
C) viewing a television programme/channel or a selection of television programmes/channels.  
D) seeing a poster or poster campaign.  
E) exposed to an advertisement or advertisement/ commercial or advertising campaign.

**Audio**—This term in a multimedia context is used to describe digital files that can produce sound.

**Audiotrack**—Audiotrack is the dedicated radio audio distribution service created by Mediatel and powered by J-ET, the radio industry's trading system.

**Average Quarter Hour (AQH)**—Average number of listeners tuned in during any 15-minute period.

**Average Hours Per Listener**—The total hours of listening to a station averaged across all those listening to the station.

**Average Listening Hours**—The total hours of listening to a station during the course of the week averaged by head or by listener.

**Branded Podcasts**—Podcasts offer branded partnerships where the content can be sponsored. The presence of the brand in the programming can vary from brand mentions to editorial integration to sponsor participation in the development of the content. Website and marketing elements can be included.

**Campaign Weight**—The intensity or volume of advertising (e.g., Light, Medium, Heavy).

**Click-Through Rate (CTR)**—Metric that indicates how many times listeners followed the link associated with a banner ad.

**Click-Through Attribution (CTA)**—KPI measuring the effectiveness of an audio ad based on the ratio of Audio Impressions and Click-throughs.

**Conversion Attribution (CA)**—KPI measuring the effectiveness of an audio ad based on the ratio of Audio Impressions and actions.

**Copy Instruction Form (CL)**—Document detailing key information about a radio campaign and how the commercial should be aired.

**Copy Length**—The length of time a piece of audio attached to the Copy Instruction form will play for.

**Cost Per Thousand**—The cost of reaching 1000 listeners with a given campaign. Traditionally the 'average station price' and is used by buying agencies and media owners when negotiating the cost of airtime. Also known as cost per mile (CPM).

**Coverage**—The proportion (expressed in percentage terms) of a target audience having an opportunity to see/hear advertising. This is sometimes broken down further: eg 1+ cover is the number of people who have seen at least one spot in the advertising campaign, 3+ cover is the number of people who have seen at least three spots in the advertising campaign etc.

**CPT**—Cost Per Thousand-Cost of reaching 1000 readers/viewers/ listeners with a given advertisement. In television the cost per thousand is also known as 'average station price' and is used by buying agencies and television contractors when negotiating the cost of airtime.

**CPT Impacts**—Cost per Thousand. The cost of achieving 1000 impacts.

**Cumulative Audience**—The proportion of a target group who have an opportunity to see or hear one advertisement from a campaign at a specified time. Or the total number of different people who tune into a station for at least 5 minutes over a set period.

**DAB**—Digital Audio Broadcasting, or Digital Radio. A system of broadcasting which produces near perfect sound quality and has the capacity for data transmission.

**Daypart**—Segment of the day used for planning (e.g., Breakfast, Mid-Morning, Drive).

**Device ID**—A device generated ID, set and/or made available by the device's operating system. Users usually cannot control or change a device-generated.

**Digital Radio**—Digital Radio, or Digital Audio Broadcasting. A system of broadcasting which produces near perfect sound quality and has the capacity for data transmission.

**Digital Radio Multiplex**—These are transmitters used by digital radio stations to broadcast digital.

**Digital Stations**—These are stations which fall under banner of digital stations.

**Dynamic Ad Insertion**—Dynamic Ad Insertion (DAI): Serving targeted ads into podcasts or streaming content in real-time.

**Effective Reach (Effective Cover)**—The percentage of the target audience who have the opportunity to hear (OTH) the desired number of TV spots, eg. if it is desired that the target audience hear between 2 and 8 spots, then the effective reach of the schedule was the percentage with between 2 and 8 OTS.

**Fixed Spot**—A guaranteed time slot (e.g., 08:10 during a breakfast show).

**FM (Radio)**—Frequency Modulation. The waveband on which most 'contemporary hit' stations broadcast, and the waveband on which the vast majority of licences are now awarded. Also known as VHF.

**Frequency**—The number of times the target audience has an opportunity to see/hear the campaign expressed over a period of time.

**Google Play Music**—Google Play Music is a music and podcast streaming service and online music locker operated by Google.

**Gross Rating Points (GRPs)**—Gross Rating Points are a metric that measures the impact of a given ad campaign. It is the sum of all ratings delivered by a schedule (Reach × Frequency).

**Group**—In radio this term refers to when spots are booked across a number of stations together as a single unit. Each station in the group has an identical spot plan. A group might include all stations in a brand, stations in a specific region or stations with a similar target audience.

**Heavy Listener**—People who watch above-average amounts of TV or listen to the above-average amounts of radio are often referred to as Heavy Viewers or Heavy Listeners.

**Impacts**—The impacts achieved by a campaign are the total number of times that campaign is heard. Calculated by a campaign's reach in thousands x OTH.

**Impression**—One instance of an ad being heard by a listener.

**JNLR**—JNLR (Joint National Listenership Research): The official source of Irish radio audience data, published quarterly.

**Linear Stations**—These are stations which fall under the banner of being traditional radio stations.

**Live Read**—Ad read live by a presenter, often in their own words.

**Market Share**—The percentage of hours that a station or channel accounts for within its transmission area.



**Multiplex (Radio)**—A carrier of digital radio services. Digital development will begin with two national multiplexes-with one for the BBC and one for commercial services. All the national services are guaranteed places on these multiplexes.

**Native Ads**—These spots are often read by a podcast host and can include an endorsement. Native ads are more associated with podcasts. Length of these spots tends to be irregular. Native ads are more be permanently integrated into the program or dynamically inserted. Positioning can include preroll, mid-roll, and post-roll.

**OTH**—Opportunity To Hear (or Frequency). Usually quoted as an average campaign will be heard, Impacts divided by Reach.

**Penetration**—Once synonymous with coverage or reach, but now falling out of use as a media term. However, was widely used in other marketing contexts, such as the proportion of housewives purchasing a product eg 'Product A market penetration is 30%'

**Planning System**—In radio a system used by media agencies and sales points to plan radio airtime campaigns for stations, groups and/or packages. The planning system allows the user to project the impacts and reach that would be gained if an ad or combination of ads were broadcast.

**Platform**—In Radio platform denotes how a listener listens to the radio (so the platform used to listen to the radio). The current platforms recorded in the JNLR survey are a radio, a pc, a pc/laptop, a smart speaker and other.

**Playout**—Is the process of a creative agency delivering a radio commercial to radio stations.

**Playout System**—A playout system is the system used by broadcasters to broadcast (or 'play out') the ads on air, so they can be heard by listeners. This can be a physical piece of equipment such as CD player; or a piece of software or indeed a group of processes.

**Podcasts**—Audio programs/tracks that can be downloaded online and listened to offline. They may also be streamed online.

**Post-Listen Attribution**—KPI measuring the effectiveness of an audio ad based on the ratio of Audio Impressions and Visits.

**Pureplay Stream**—Personalised and on-demand online/ streamed audio services that create playlists based on user preferences of artists, tracks, or genres.

**Pre-Roll**—Ads running before the start of an on demand programme such as a podcast.

**Mid-Roll**—Ads running in the middle of an on demand programme such as a podcast.

**Post-Roll**—Ads running at the end of an on demand programme such as a podcast.

**Profile**—The way a radio programme's audience breaks down across a single variable like age, job title, income, and so on.

**Programmatic Audio**—Buying audio ads via automated platforms (like Spotify, Acast, etc.).

**PRS / Music Details**—A reference to any music used in advertisements.

**Rating / Spot**—Single half-hour or quarter-hour audience expressed as a percentage of the population group being measured. Calculated by half or quarter-hour audience x 100, divided by relevant population.

**Reach / Campaign**—The number of different individuals who are exposed to a schedule of commercials.

**Reach**—Number or percentage of people who hear a station or campaign at least once in a given period.

**Respondent**—The person providing the information to the interviewer/researcher.

**Respondent Level Data**—In radio this refers to JNLR data which is analysed at the most granular level, by individual respondents' diaries.

**Rotation**—How evenly ads are spread across time slots and shows.

**Run of Station**—ROS (Run of Station): Flexible scheduling across all dayparts; usually cheaper.

**Sales House (Radio)**—The company that sells radio activity on behalf of the owner of the radio station. In many cases, the sales point owns the radio stations that it sells the airtime for. In a few cases, the sales point doesn't own the station, but acts as a selling agent for the owner of that station.

**Schedule**—Media schedule-list of media vehicles usually with accompanying data, such as insertion dates, rates, etc.

**Share**—Channel or Audience Share is calculated by comparing the average minutes viewed/ listened for each channel/station in a given time period.

**Share of Audience**—Percentage of selected audience which is tuned to a particular medium at a given time, e.g. the proportion of the target group who are watching a particular TV channel between the hours of 7:30 p.m. and 8:00 p.m.

**Share of Listening**—The percentage of total listening time accounted for by a station in the UK/area.

**Share of Voice**—Share of total adspend accounted for by an advertiser or group of advertisers within a defined market sector over a specified time period.

**Simulated Station**—This term is generally used to refer to a radio station not yet on the Rajar survey that is using simulated data for planning schedules. The simulated data is often based on a percentage of another Rajar station's data.

**Split-Transmitter**—This term is used when an analogue radio station has multiple transmitters and chooses to play out different programming or ads on one or more of the transmitters.

**Spot Length**—Length of time an individual spot plays for.

**Spot Plan**—A detailed schedule showing when and where spots will run.

**Sponsorship**—Brand alignment with a show, feature, or segment (e.g., weather, traffic).

**SSP/DSP**—Supply-Side/ Demand-Side Platforms used in programmatic advertising.

**Spot Rating**—Single half hour or quarter hour average audience expressed as a percentage of the population group measured: calculated by half or quarter hour average audience x 100 divided by reach.

**Spotify**—Spotify is a digital music, podcast, and video streaming service.

**Stereo Audio**—two different channels of audio signal, recorded with two microphones spaced apart (or with a single microphone with two elements)

**Time Spent Listening**—TSL (Time Spent Listening): Average amount of time a person spends listening to radio during a given period.

**Target Market**—A campaign's primary target defined either in terms of lifestyle or by standard demographics-age, sex and class.

**Total Hours (Radio)**—Total amount of time spent listening to a given station by all individuals who listen to it in an average week.

**Traffic System**—The system used by the stations in order to schedule the spots based on the spot plan.

**Transmitter**—The location where the broadcast is made for a station, stations may have one or in many cases multiple transmitters to broadcast the output.

**Triton Digital/Adswizz**—Digital ad delivery and reporting platforms used in streaming audio.

**TSA**—Total Survey Area. The area within which a station's audience is measured. This is defined by the station using postcode districts as building blocks.

**User / Unique User**—A Unique User is an unduplicated user as determined through registration, user self-identification using an application or being exposed to an advertising campaign during a reporting period.

**Unweighted Sample**—Those survey respondents who are successfully interviewed or who returned usable questionnaires (I.e. the Analysis Sample) before sample weights have been applied.

**VAST Tag**—A code that allows ad servers to deliver and track digital audio ads.

**Voice Activation Ads**—Some platforms offer integration with a technology that enables listeners to respond to an ad in hands-free mode by simply speaking. Specific calls to action might be to have information emailed or texted to the user, enabling a connection between the advertiser and the consumer.

**Voice Click-Through**—Metric that indicates how many times listeners respond to interactive audio ads via voice in order to connect with advertiser offers (by automatically initiating call, a video view, request an email, webpage open, content selection) on a mobile device.

**Where Listened**—The location of the respondent when listening (i.e. work, car, home).