

JNLR: The Data you Didn't Know you Had

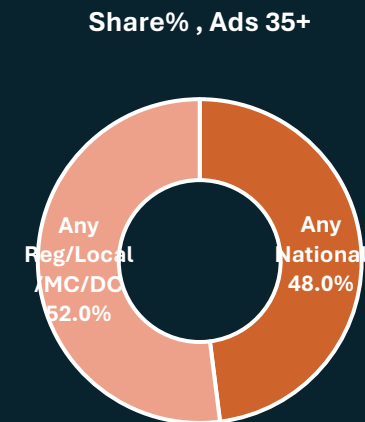
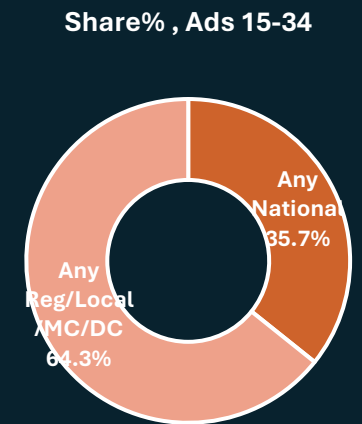
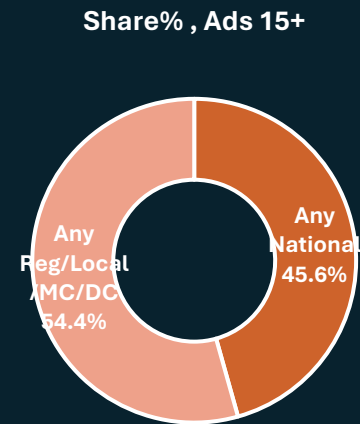
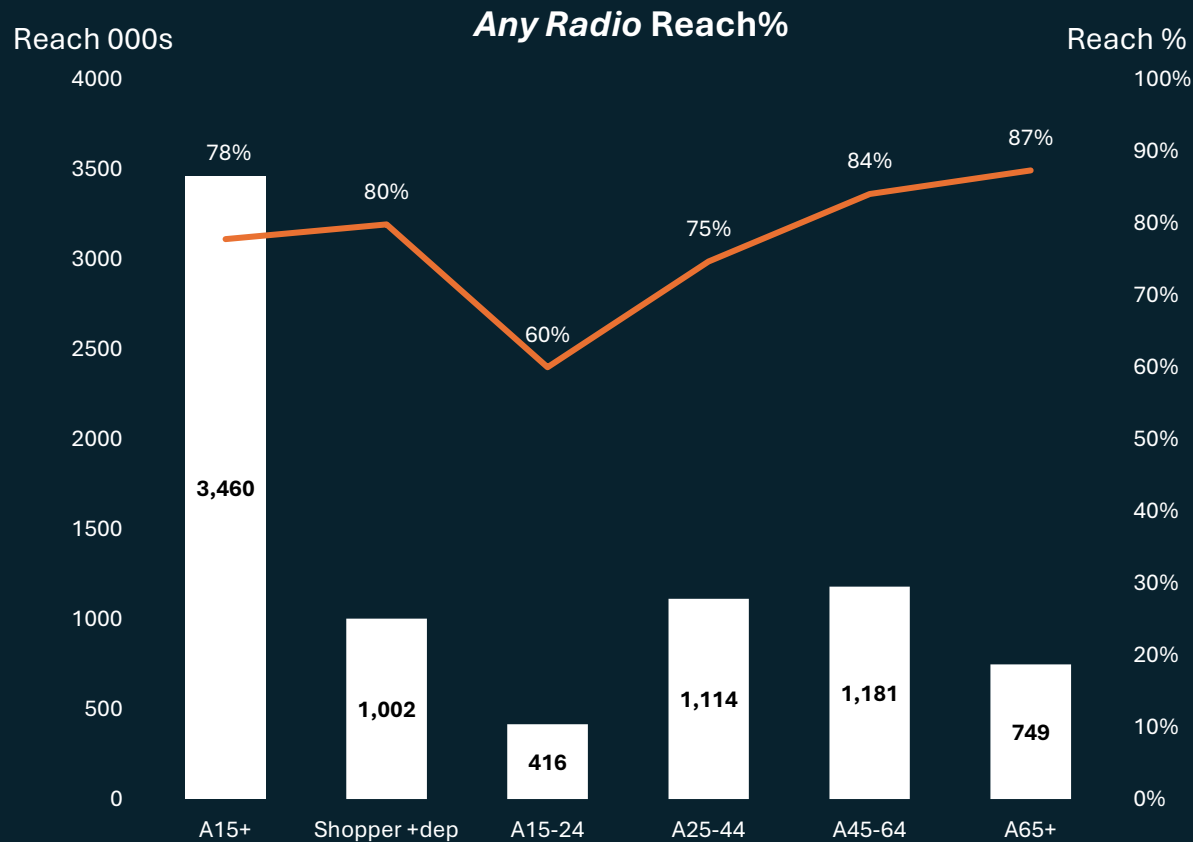
Source: JNLR/Ipsos B&A 2026-1 | Any Radio, Weekday listening only
Nessa Carter | JNLR Executive Lead
21st May 2026



We talk about Reach and Share all the time...



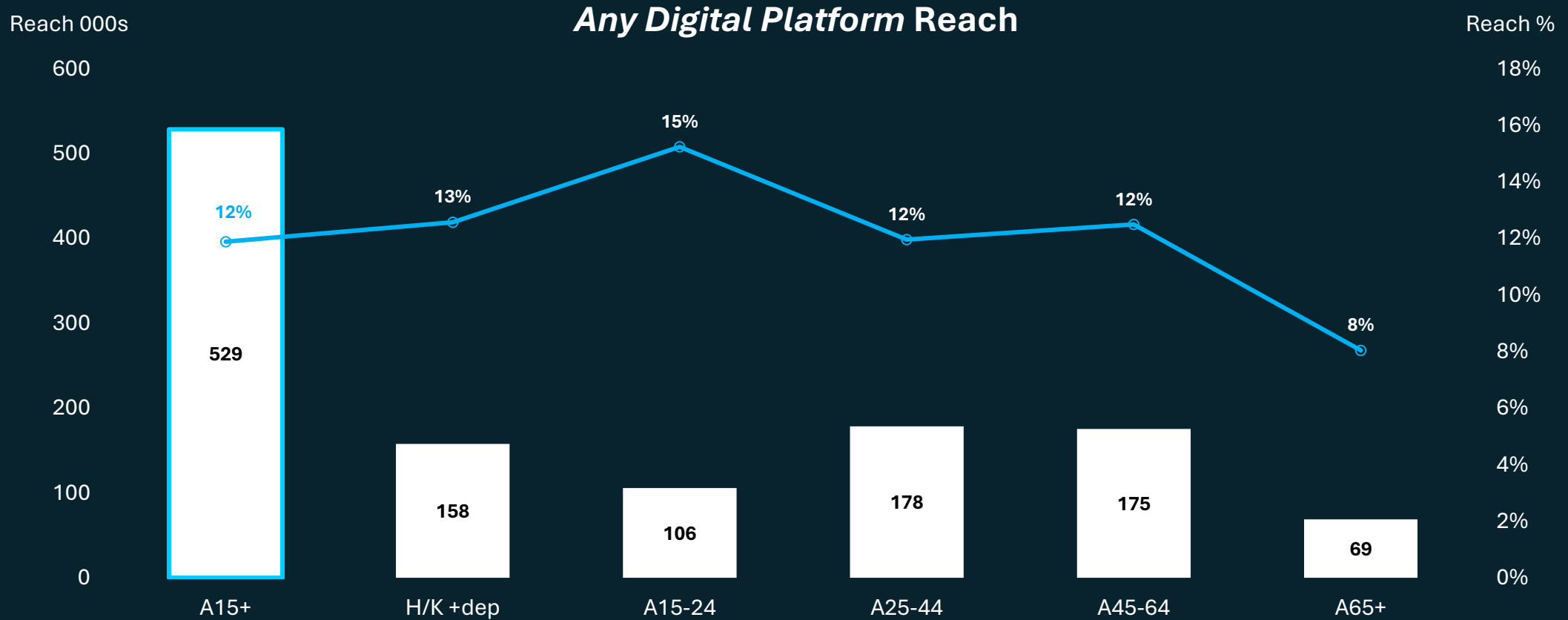
3.46M listen to the Radio every day



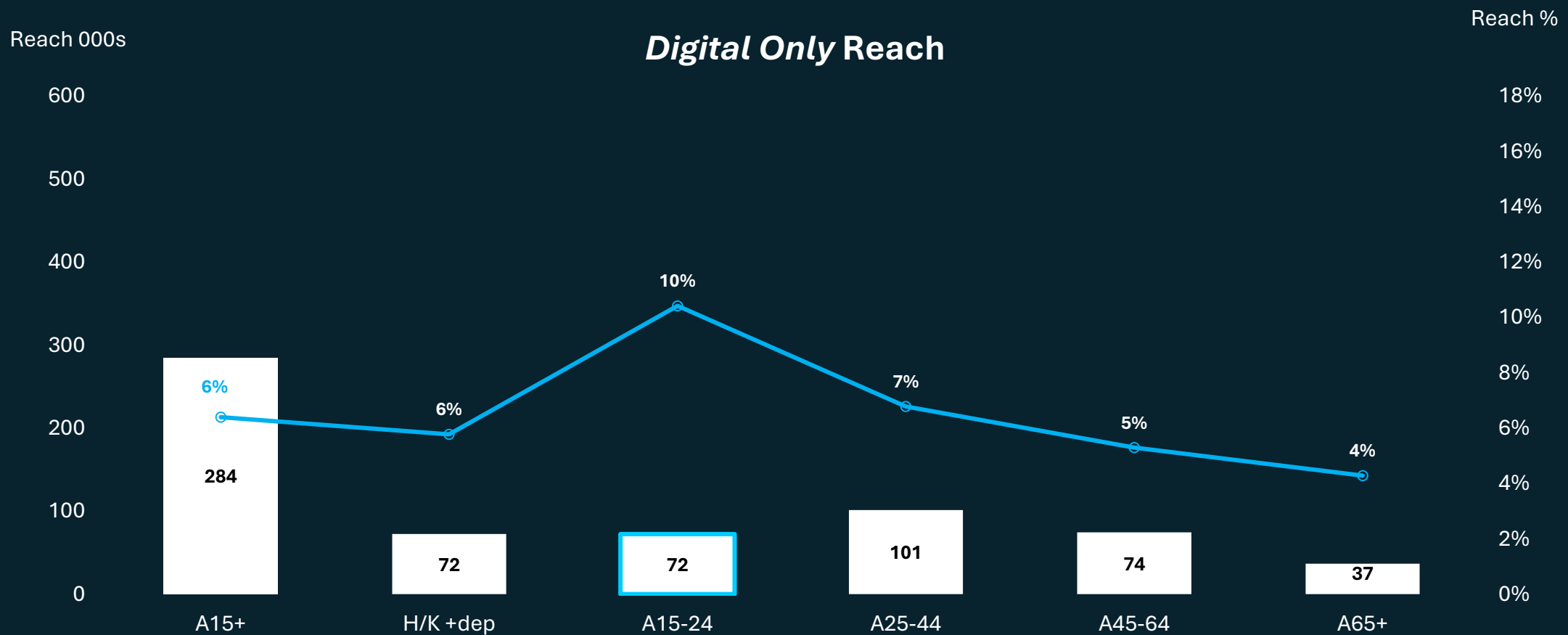
But less often about “How”?



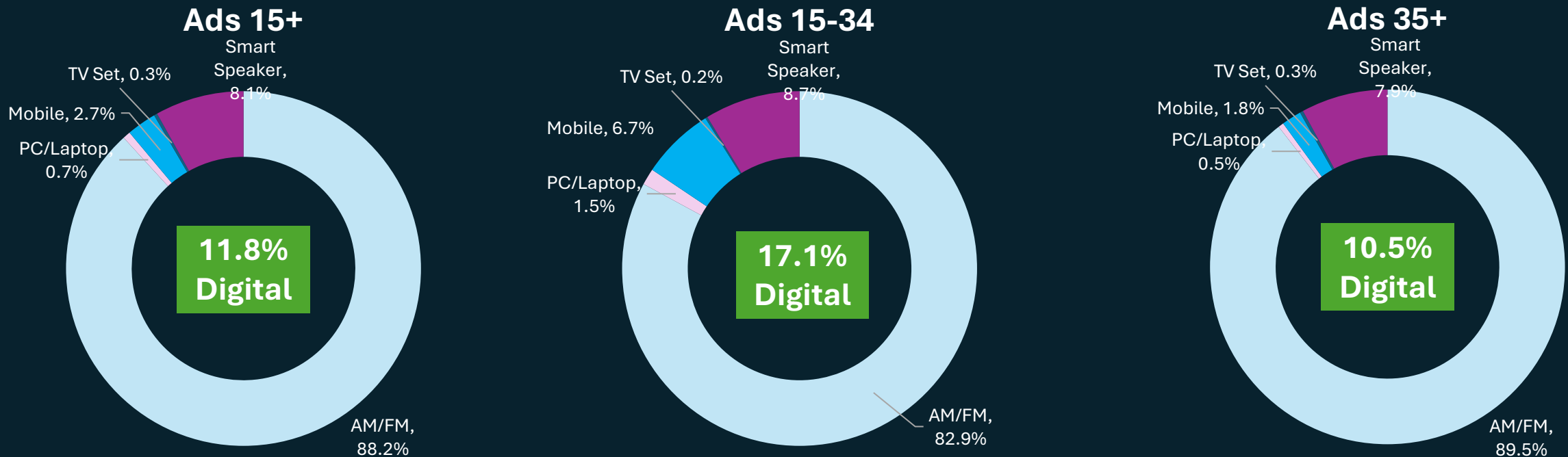
Over half a million listen to Radio on a Digital Device every day



1 in 10 under 25s only use a Digital Device to listen to the Radio = 72k every day.



While FM Radio delivers the bulk of minutes listened to Radio, among younger audiences Digital Platforms account for 17.1% of listening



Looking at Devices in more detail...

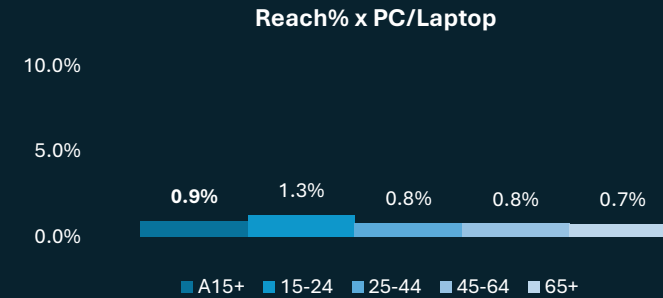
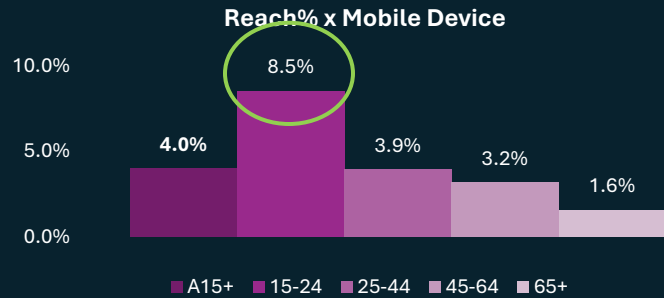


Different devices serve different audiences

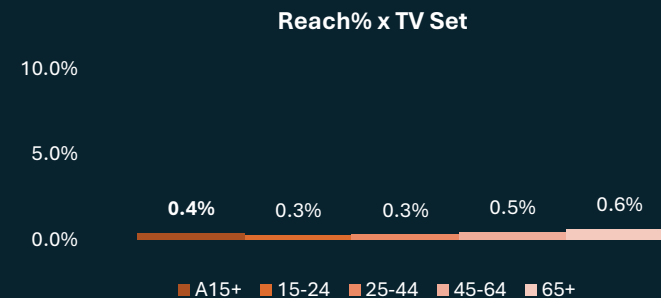
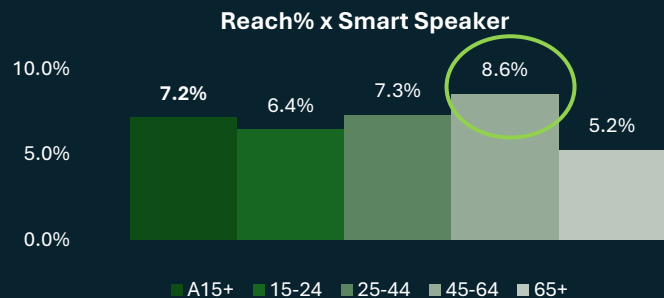
Reach x Platform



Crucial for younger cohort



Delivers across the board

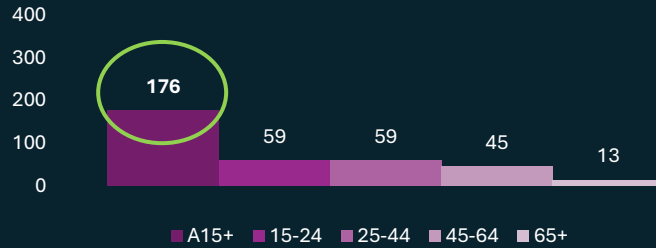


Different devices serve different audiences

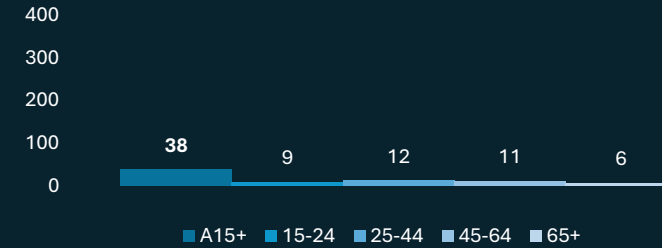
Reach x Platform



Reach 000s x Mobile Device



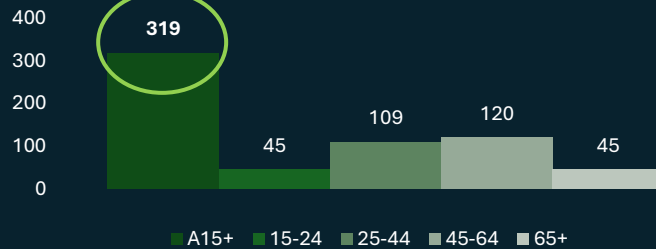
Reach 000s x PC/Laptop



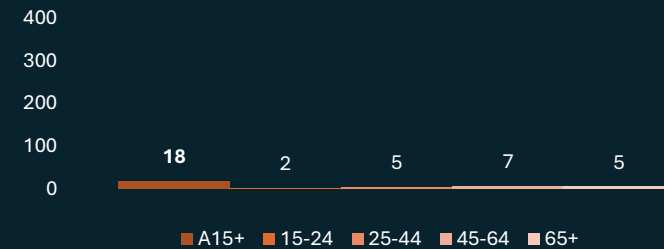
319k listen via Smart Speaker every day



Reach 000s x Smart Speaker



Reach 000s x TV Set

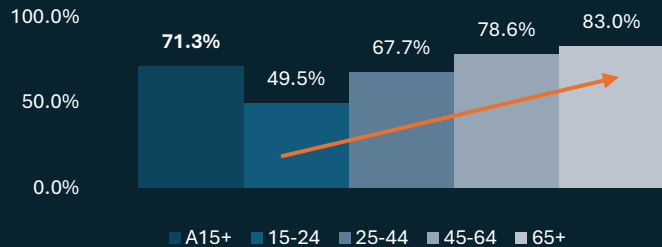


Not forgetting FM Radio, which continues to dominate Radio listening

Reach x Platform

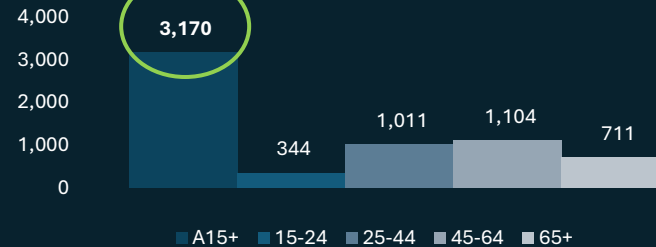


Reach% x FM Radio

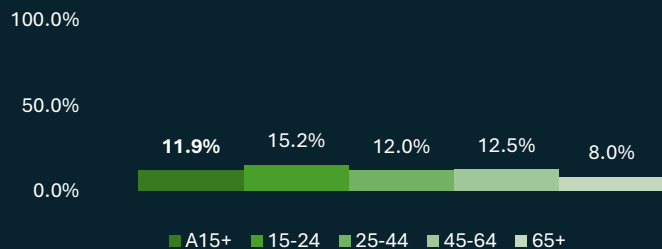


3.1M listen every day

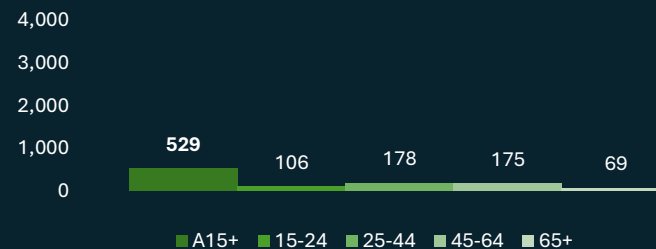
Reach 000s x FM Radio



Reach% x Any Digital Platform



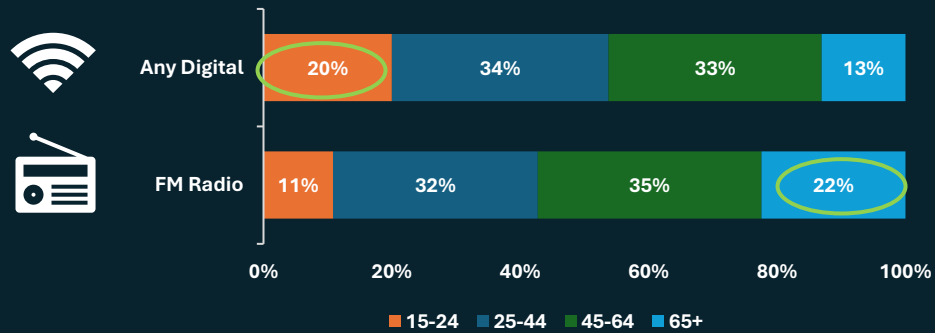
Reach 000s x Any Digital Platform



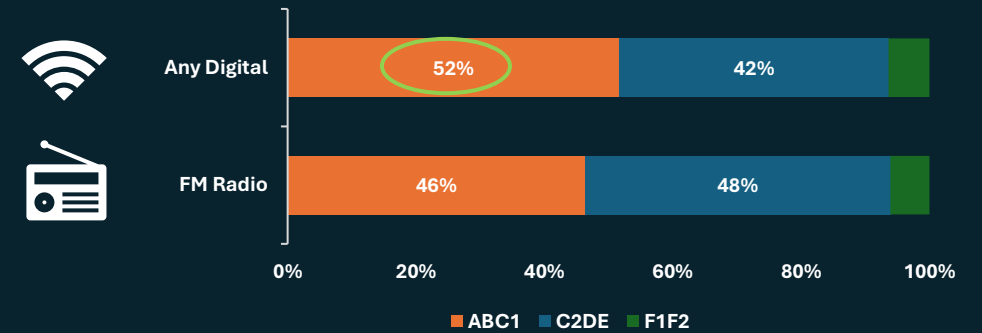
The Listener Profile of each Device also highlights differences

Profile% x Platform

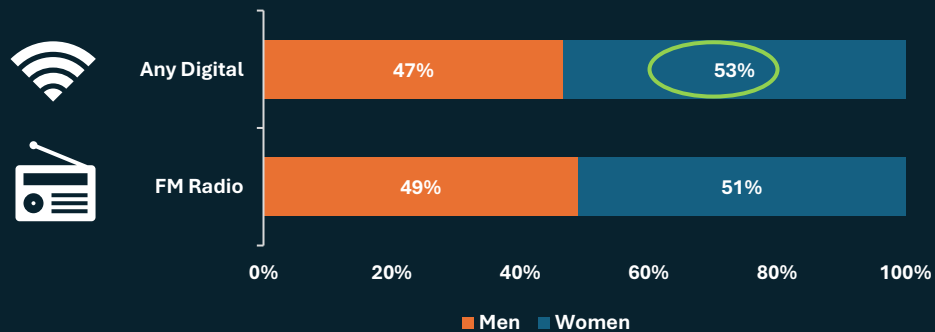
Age Profile%



Social Group Profile%



Gender Profile%



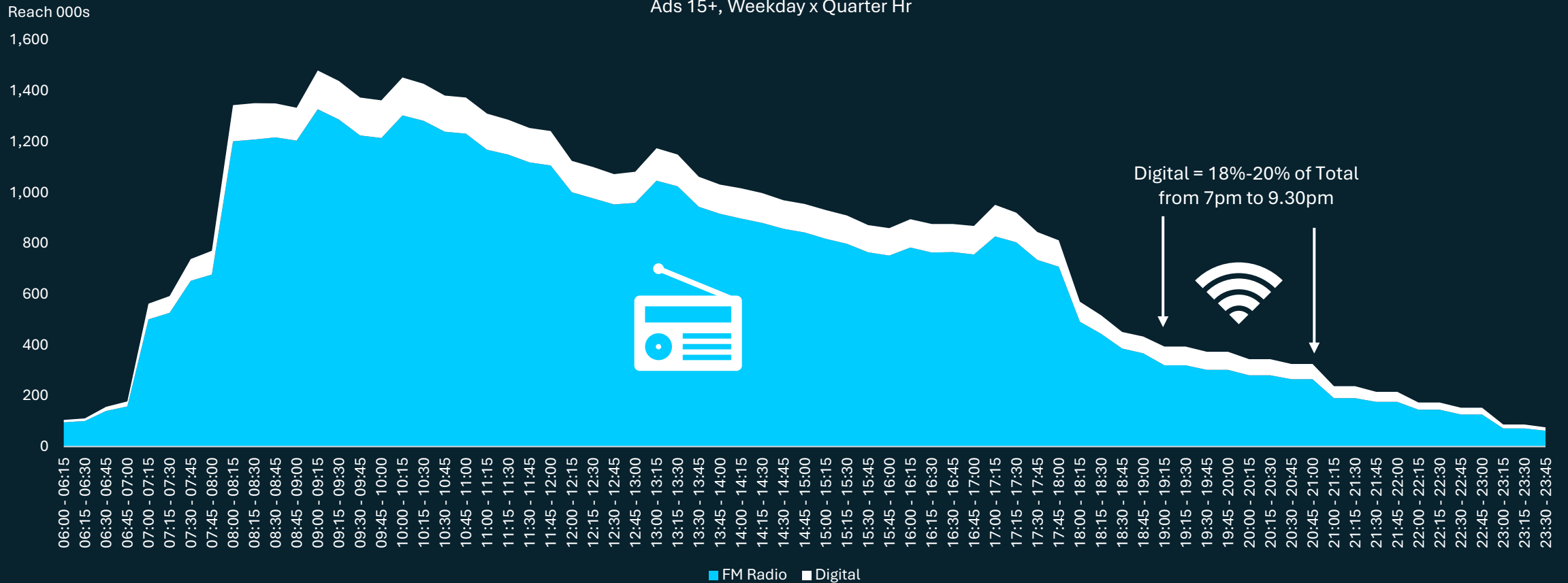
How Devices fit into the Radio day



Listening via FM delivers the bulk of Radio through the day

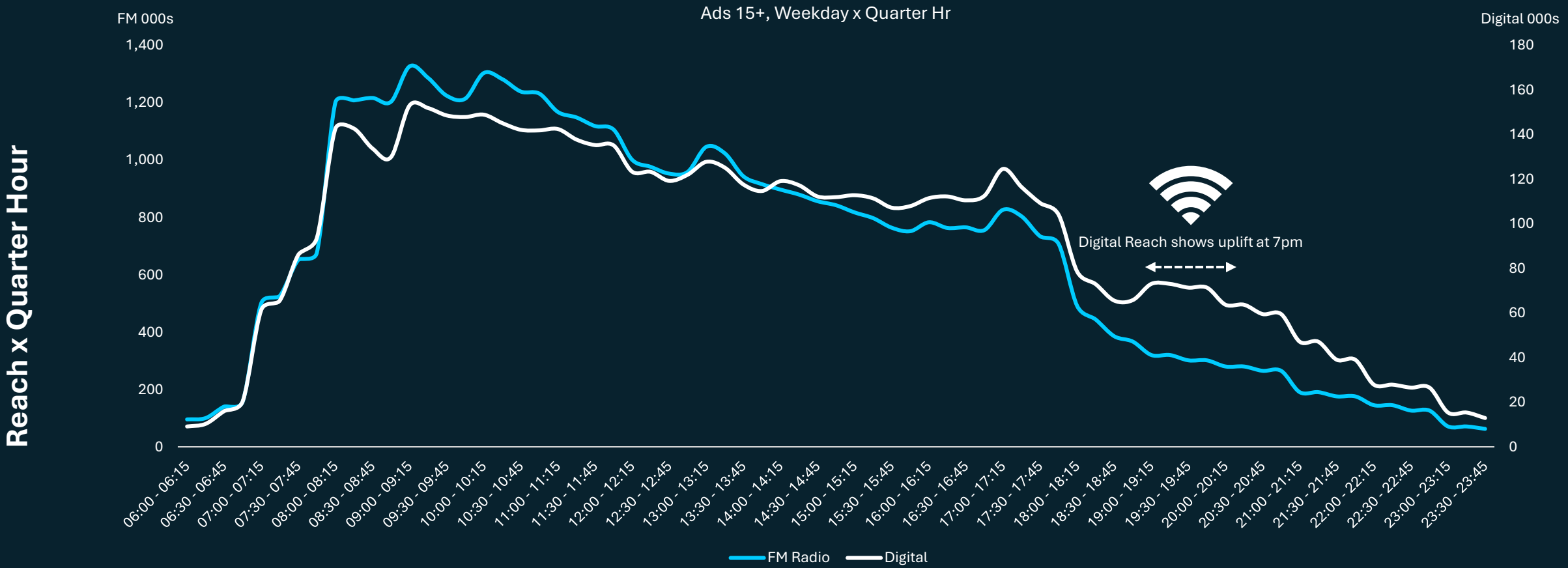
Ads 15+, Weekday x Quarter Hr

Reach x Quarter Hour

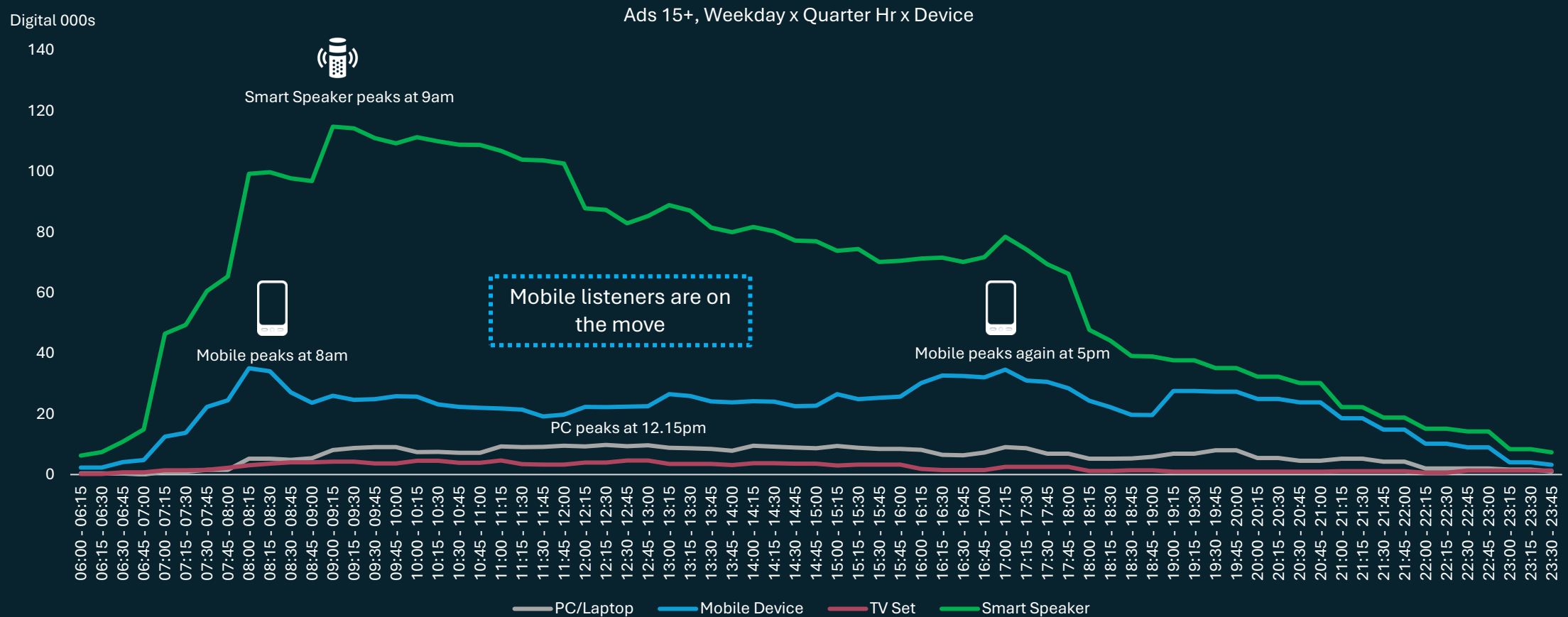


And the pattern of Digital Reach broadly mirrors FM until the evening

Note. FM and Digital displayed on different axes



Patterns shift at device level, with some digital devices peaking outside the FM peak (9am)



And different age groups?





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15-34s

Platform Toplines	Reach%	Reach 000s	Share%
FM Radio	56%	772k daily	82.9%
Any Digital Device	13.8%	189k daily	17.1%
Smart Speaker	7%	91k daily	8.7%
Mobile Device	7%	91k daily	6.7%
PC Laptop	1%	14k daily	1.5%



121k only use a Digital Device to listen to the Radio

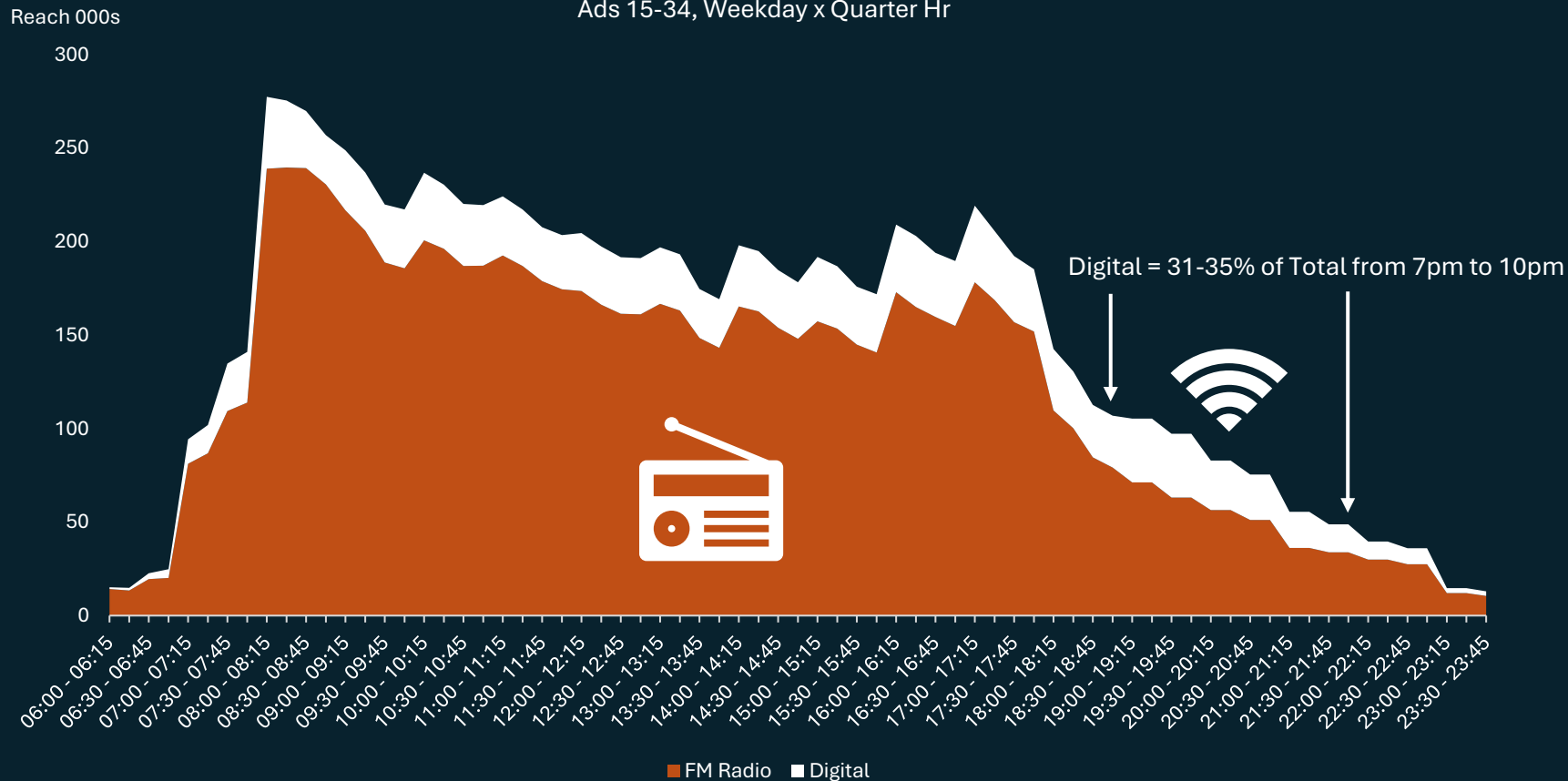


17.1% of minutes listened to Radio are listened via a Digital Device

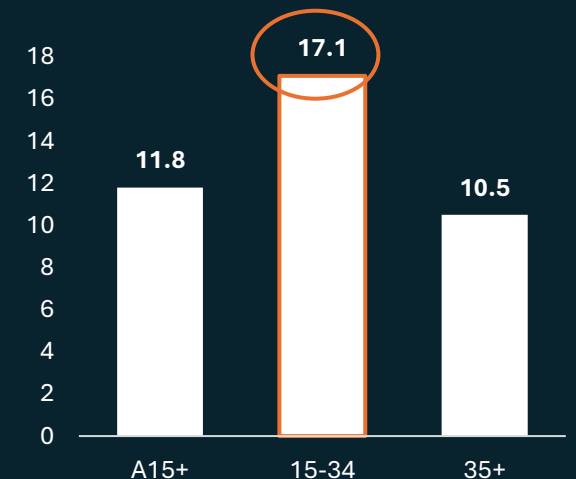
65% of 15-34s listen to the Radio every day=894k

Digital delivers a higher % of 000s vs. average, and greater share of time spent.

Ads 15-34, Weekday x Quarter Hr

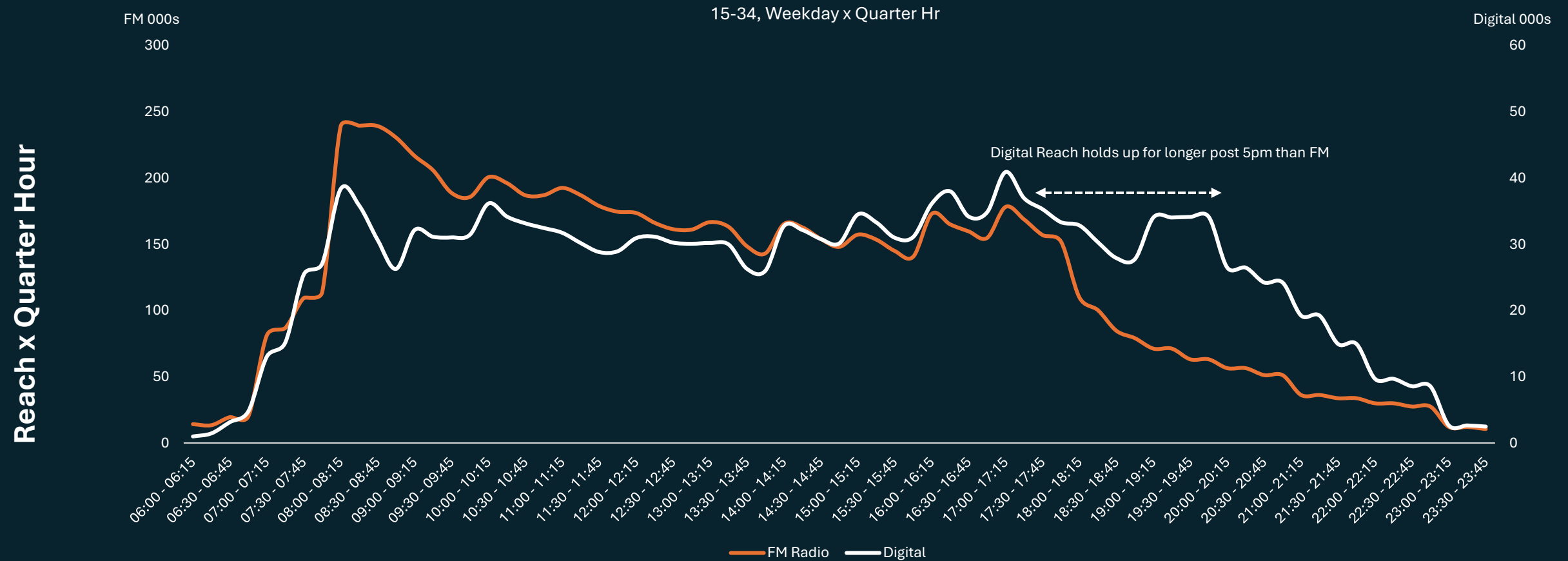


Share% x Digital Platform

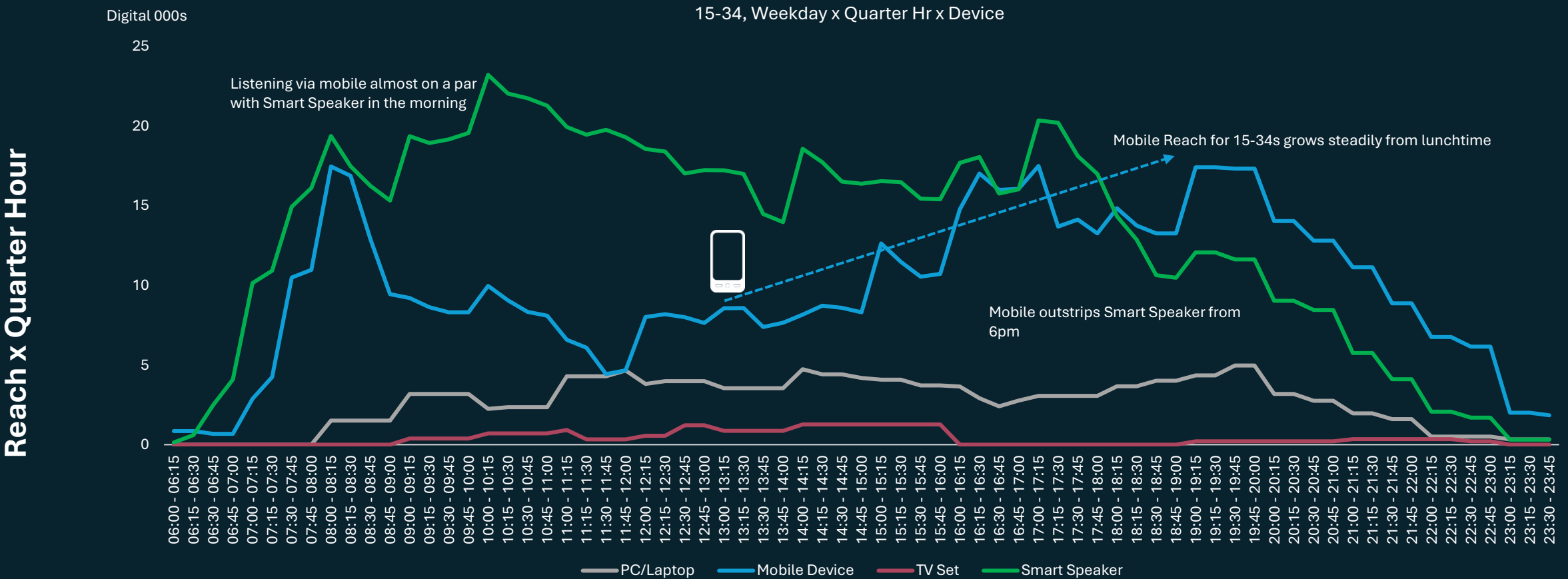


And Digital Reach holds up past the 5pm FM decline

Note. FM and Digital displayed on different axes



Mobile pattern very different to FM among u35s



35+

Platform Toplines	Reach%	Reach 000s	Share%
FM Radio	78%	2.4M	89.5%
Any Digital Device	11%	340k	10.5%
Smart Speaker	7%	228k	7.9%
Mobile Device	3%	85k	1.8%
PC Laptop	1%	24k	0.5%



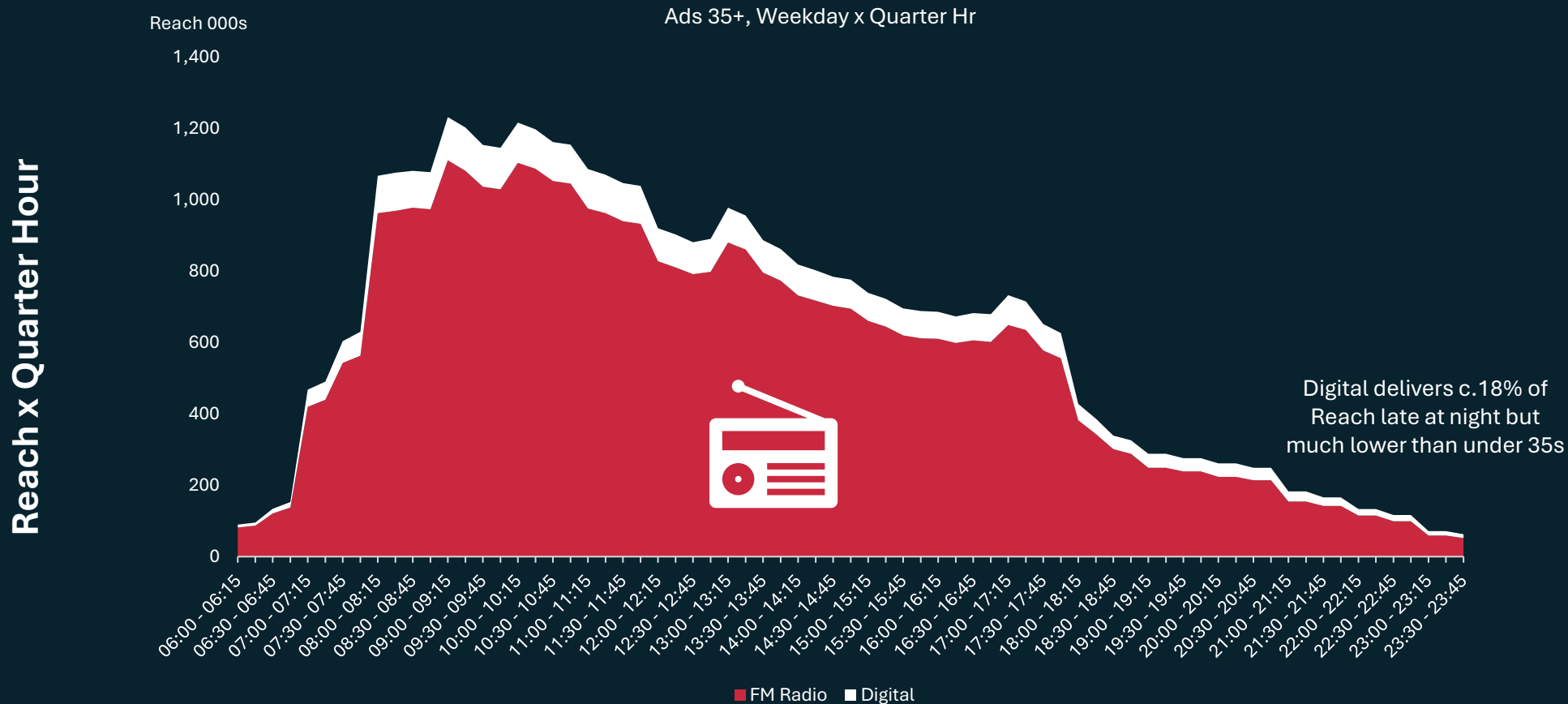
164k only use a Digital Device to listen to the Radio



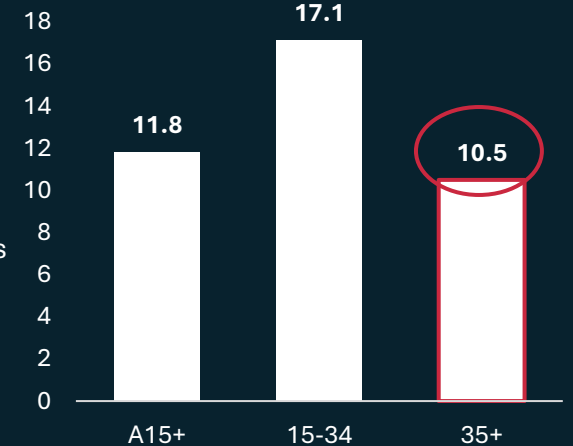
10.5% of minutes listened to Radio are listened via a Digital Device

83% of over 35s listen to the Radio every day=2.56M

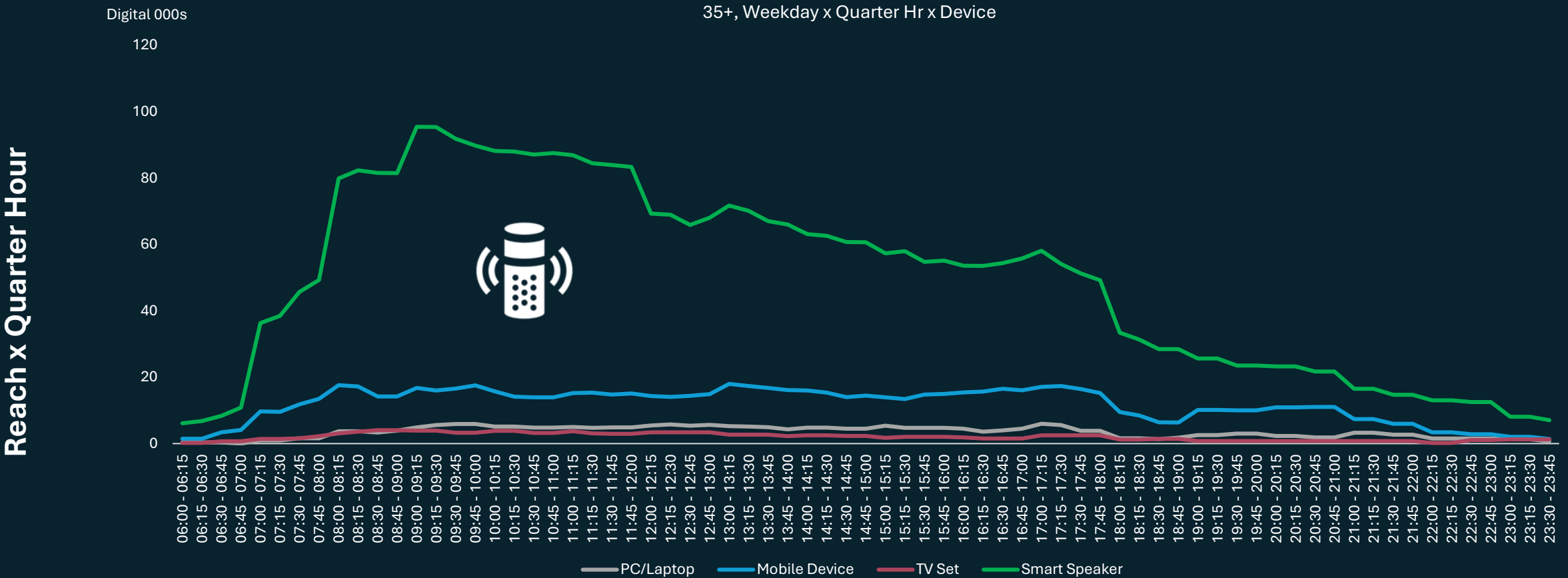
Among over 35s, FM delivers bulk of Reach throughout the day. Digital Reach averages c.12% in each quarter vs. 19% for under 35s.



Share% x Digital Platform

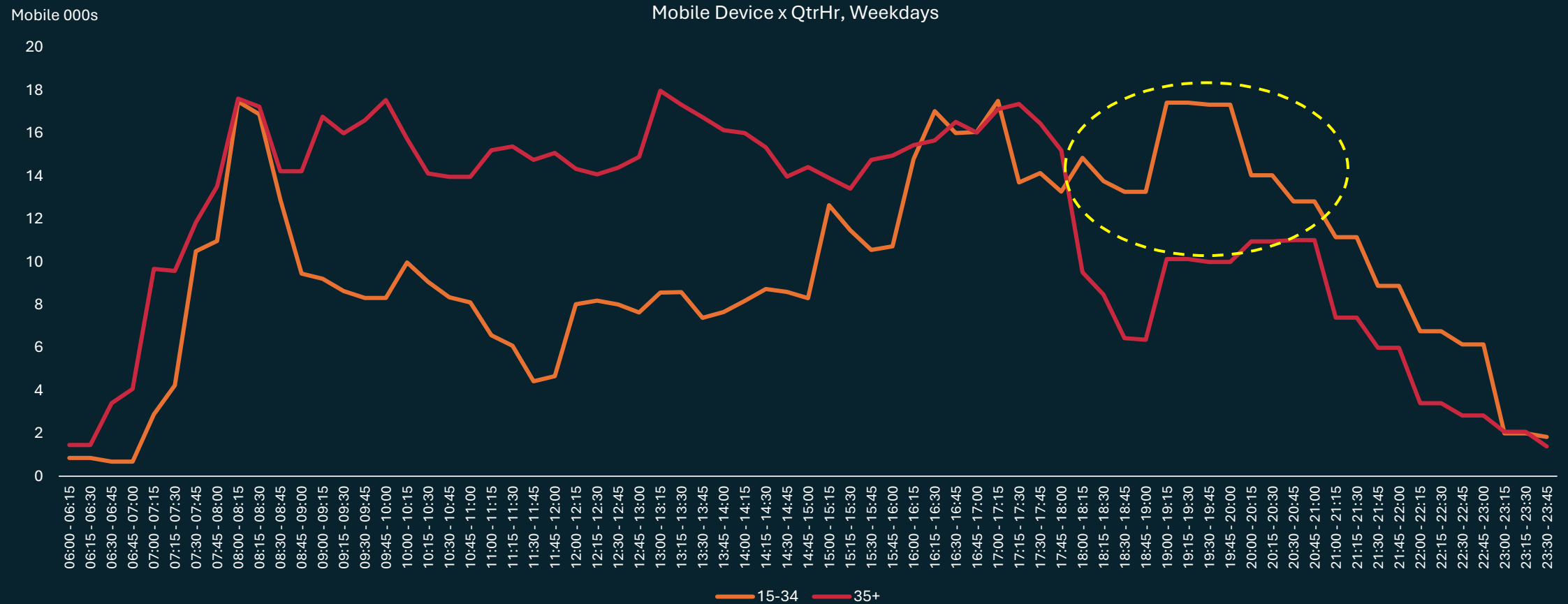


Of the Digital Platforms, Smart Speaker dominates for over 35s.





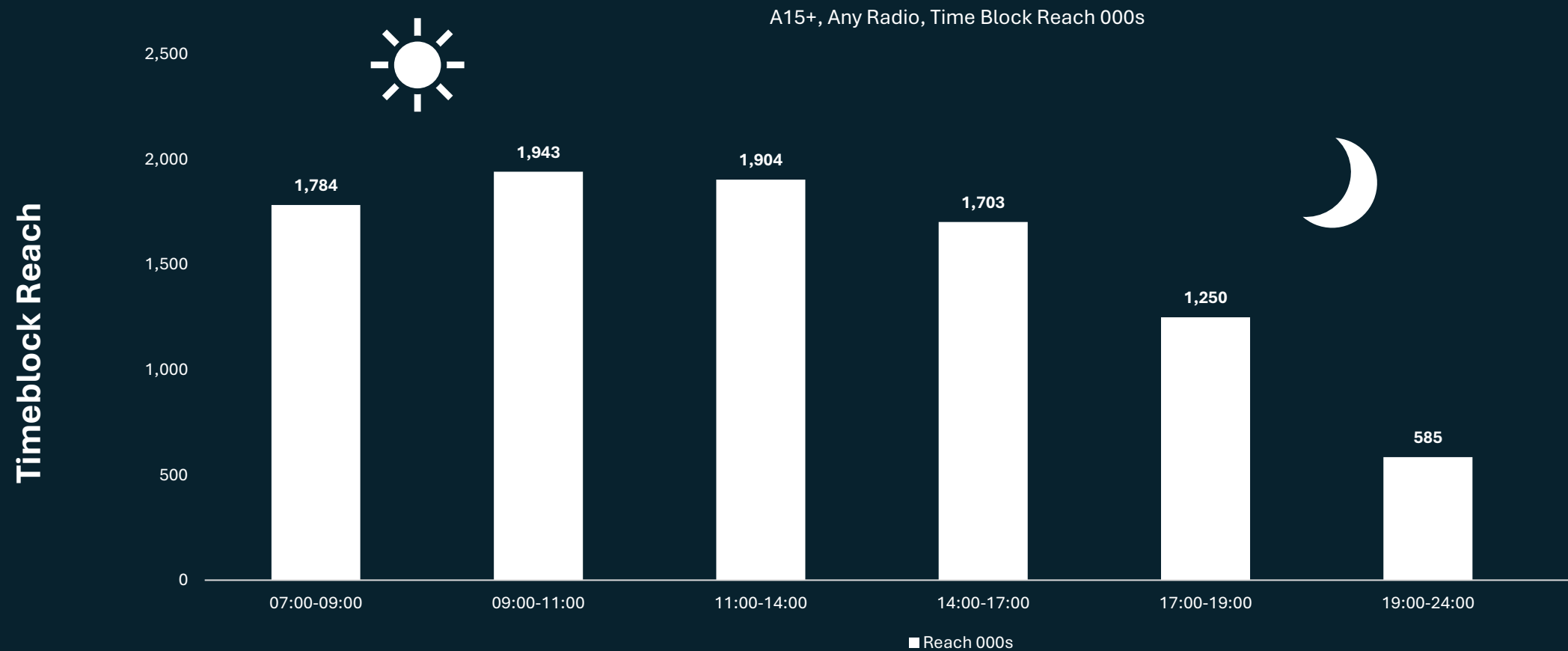
Reach via mobile among under 35s outstrips 35+ from 6pm



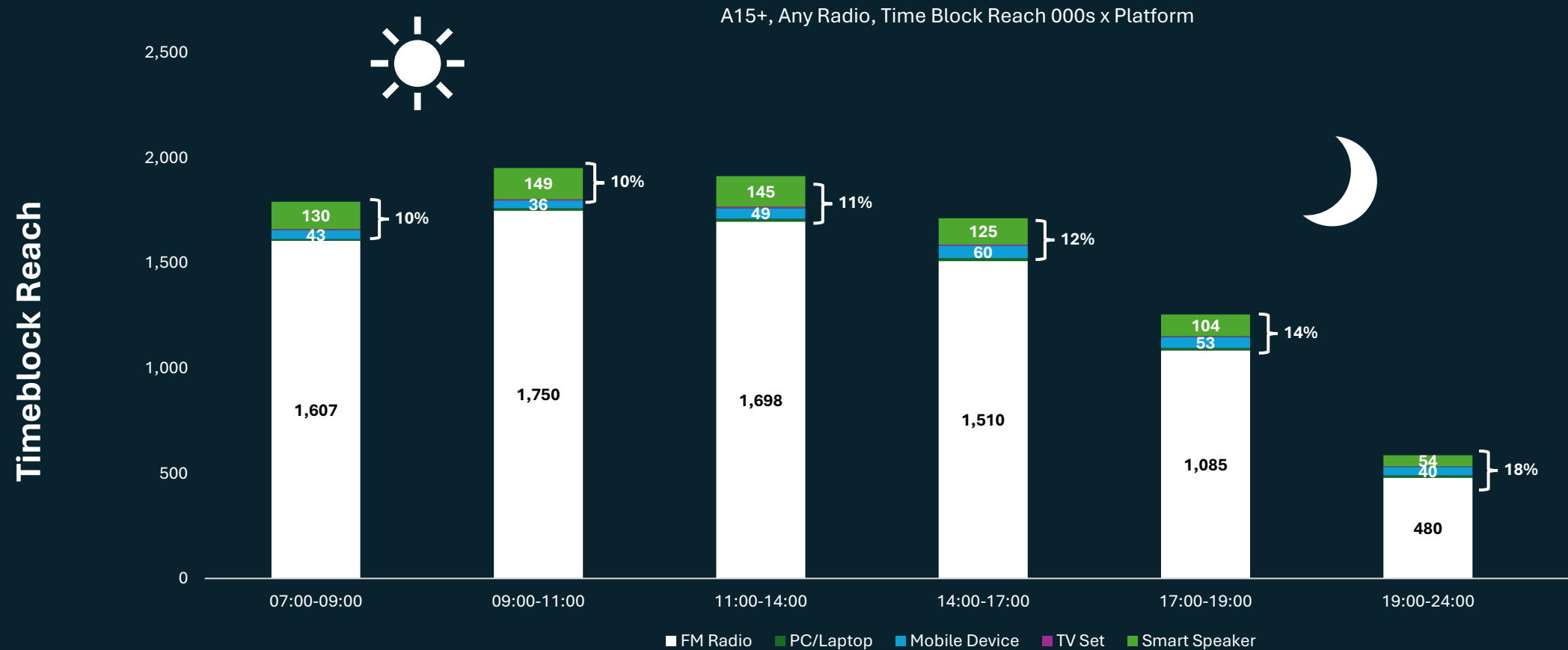
What about programmes?



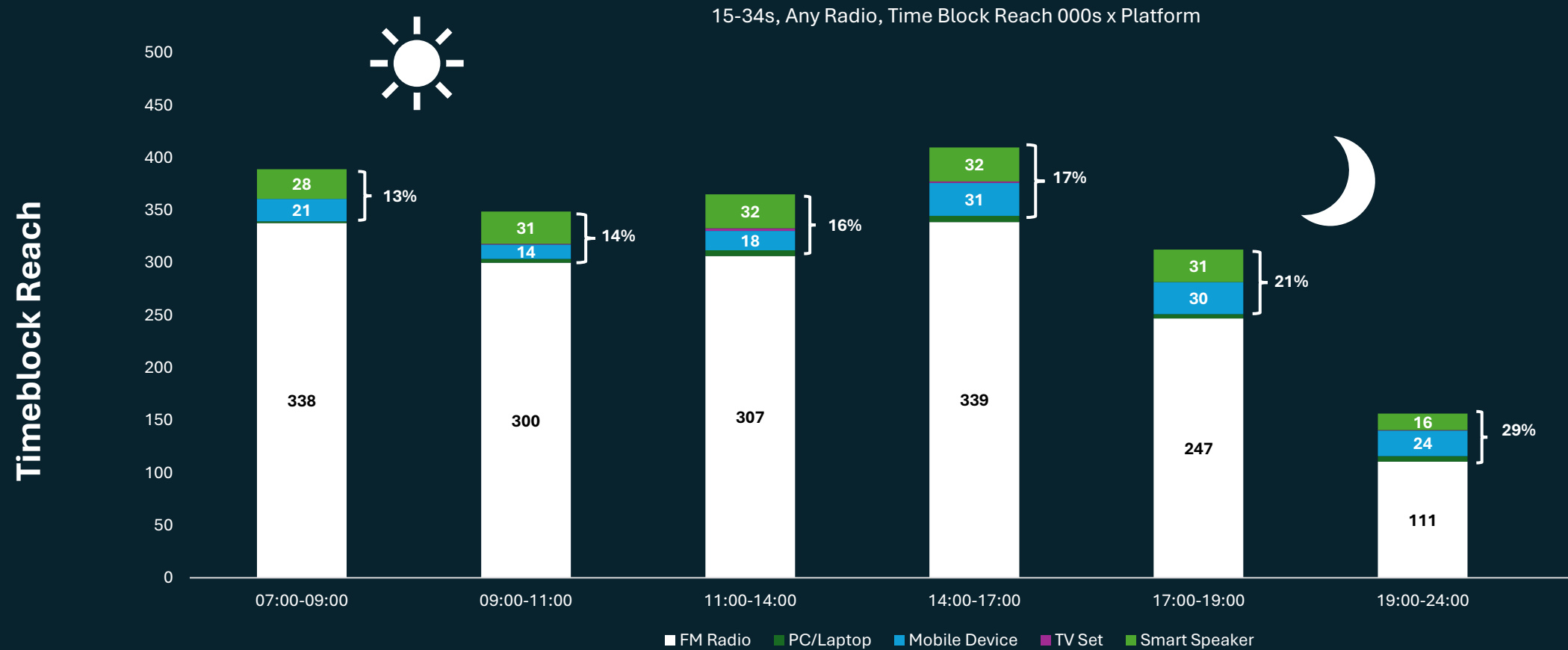
We talk about... “How Many” listened to a show



But less about “How” they listened



And the importance of Digital for under 35s



Summary

- Radio can be consumed everywhere, and anywhere, and the JNLR has lots of data which highlights this.
- Using the JNLR, we can talk about “how” as well as “how many”.
- Different devices serve different needs depending on time of day.
- Smart Speaker behaviour is similar to FM Radio while Mobile connects Radio to the listener rather than the location.
- Digital is crucial for younger listeners, especially Mobile.



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Thank you!