Ipsos

RADIOCENTRE IRELAND

WEBINAR

The Irish Audio Market report

11.10.22

JOINT NATIONAL LISTENERSHIP RESEARCH

Summary

- Radio's reach and engagement with audiences ensures its prominent position in a competitive audio sector and keeps it relevant for the future.

- Irish audiences are connected in the digital world. Ownership of smart phones (90%) and smart speakers (40%) enables easy access to audio content at home or anywhere.

- Most listening to audio content happens in the home. Three in every four (74%) listened to audio at home yesterday, an average day. 39% listened while driving – live radio is the biggest format in the car environment.

- There is almost universal weekly ('past week') listening to audio content (96.7%) and live radio is the dominant player in this field reaching 90.2% of adults weekly. While listening to on-demand, online audio is growing (58.1%) this represents a significant gap.

Summary

- The growth in on-demand, online, audio audiences is not at the expense of radio. Over time music streaming services are replacing our traditional music archives such as CD's, vinyl or downloads.

- On an average day, Live radio currently has a share of 74.3% of the audio market, perhaps best reflecting an engaging, easily accessible (and free) format for listeners. While many tune into on-demand audio, the time spent (25.7% share) is significantly less than for live radio.

1. The JNLR recap
2. Technology enables access
3. The daily audio environment
4. The audio market
5. Questions

78.6%

Listen to radio every day

4hrs 20mins

Average time spent per listener every day

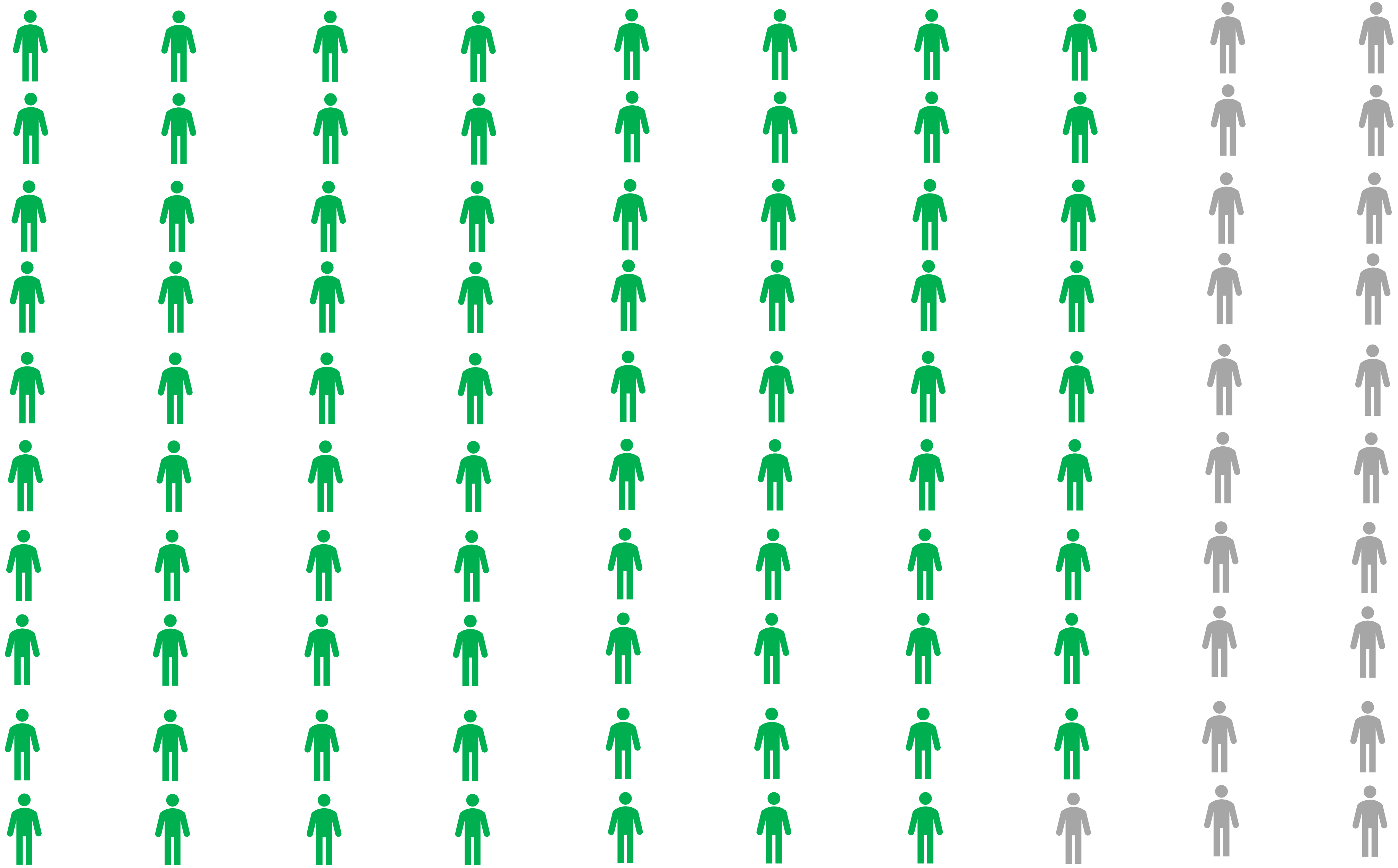
13.6 million

Total hours listened every day

Source: JNLR 2022-2 Core Interview (Jul'21 to Jun'22 – 12 mth data)
Base: All 15+ - Mins/hours - 7am to Midnight

The number of daily radio listeners

Source: IPSOS/JNLR



The number of Facebook daily users

Source: IPSOS Social Media Tracker

The number of Instagram daily users

Source: IPSOS Social Media Tracker

The number of Twitter daily users

Source: IPSOS Social Media Tracker

The number of LinkedIn daily users

Source: IPSOS Social Media Tracker

The number of Pinterest daily users

Source: IPSOS Social Media Tracker

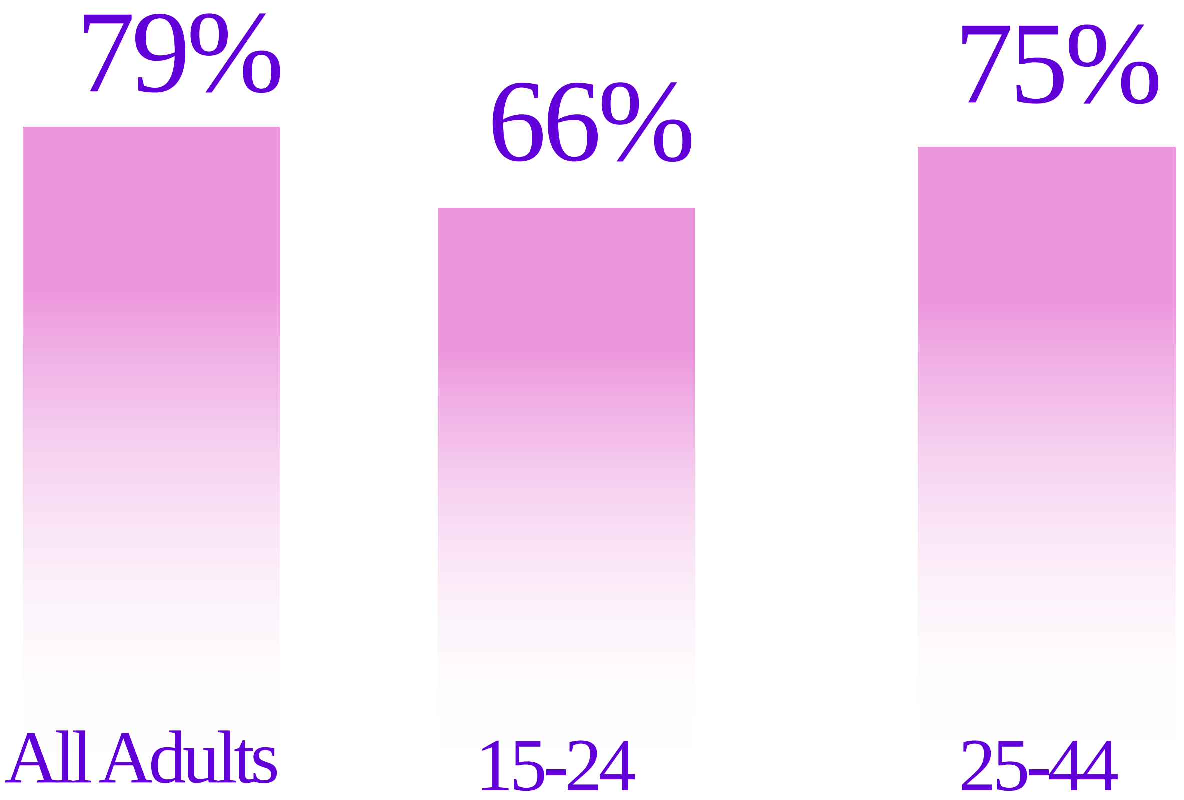
In a crowded audio space where media content and platforms continue to multiply, radio persists at the core of daily life

2018	3,138,000
2019	3,167,000
2020	3,187,000
2021	3,171,000
2022	3,194,000

Radio Daily Reach

Source: JNLR 2022-2 Core Interview (Jul'21 to Jun'22 – 12 mth data)
Base: All 15+

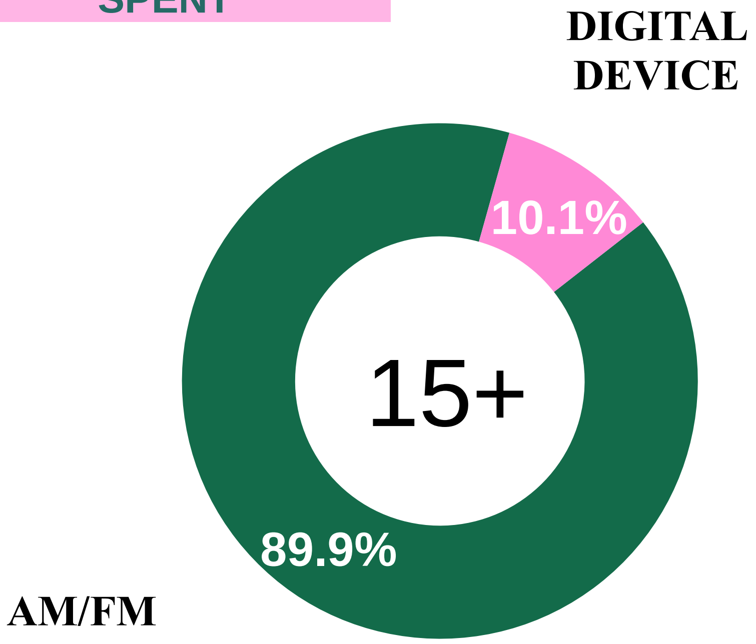
Even among the younger 15-24 audience, two-thirds of this set tune into radio every day

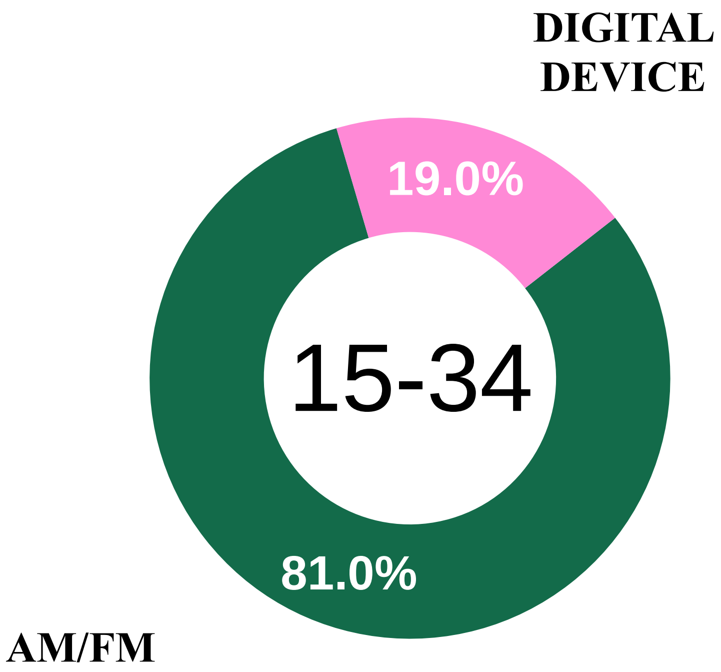


Source: JNLR 2022-2 Core Interview (Jul’21 to Jun’22 – 12 mth data)
Base: All 15+

Most radio listening happens on FM radio

SHARE OF TIME SPENT





Source: *Source: JNLR 2021-2 Core Interview-(Jul’21 to Jun’22 – 12 mth data)*

* Based on share of minutes 7am-midnight, to Irish stations

Technology Enables Access

Irish audiences are highly connected

88%
HAVE BROADBAND ACCESS

90%
OWN A SMARTPHONE

70%
OWN A TABLET

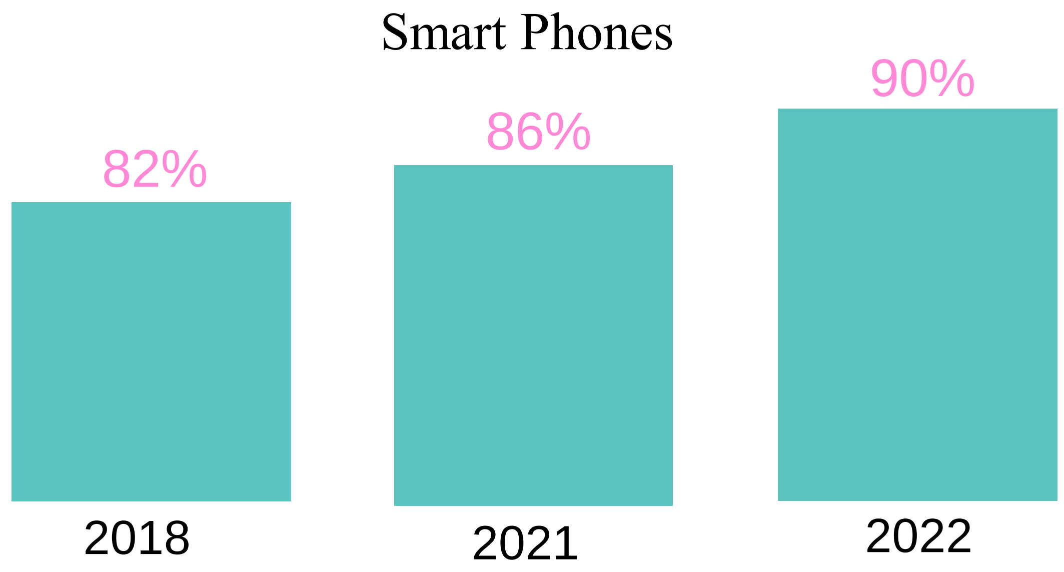
40%
OWN VOICE ENABLED TECHNOLOGY

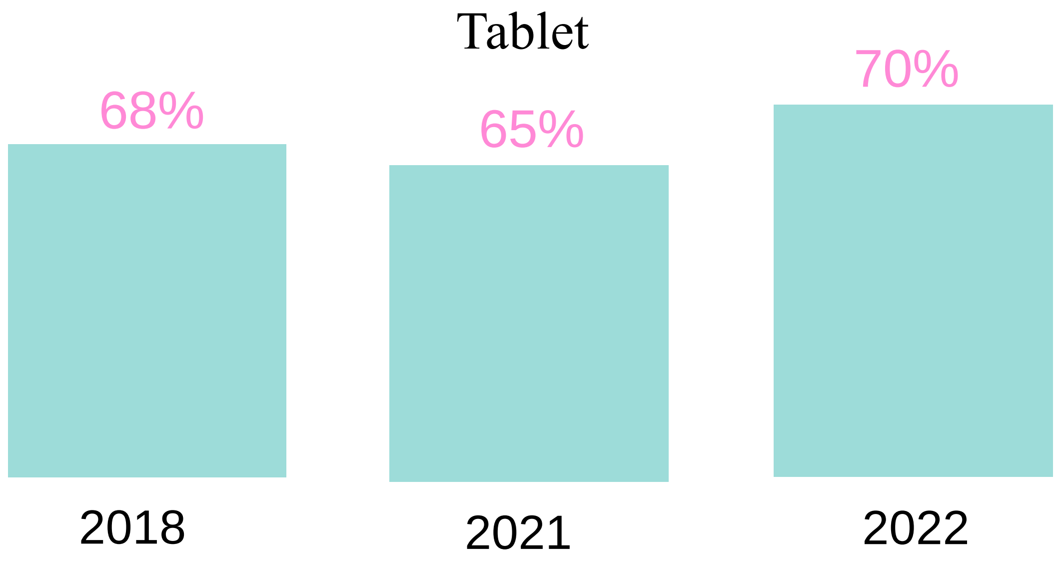
75%
HAVE ONLINE TV SERVICE (NETFLIX; DISNEY …)

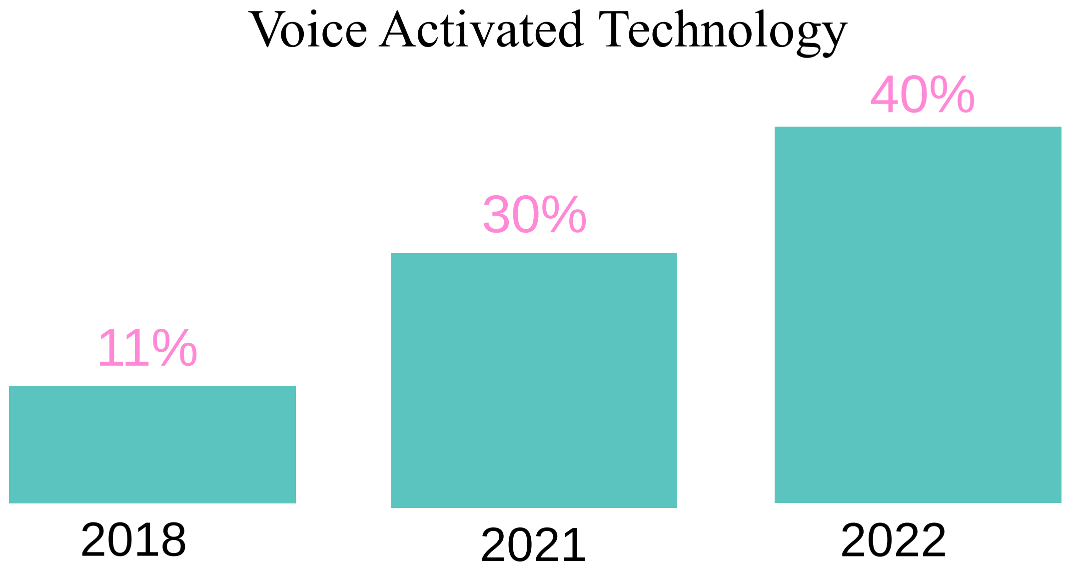
Source: JNLR 2022-2 Audio Module (Apr’22 to Jun’22 – 3 mth data)

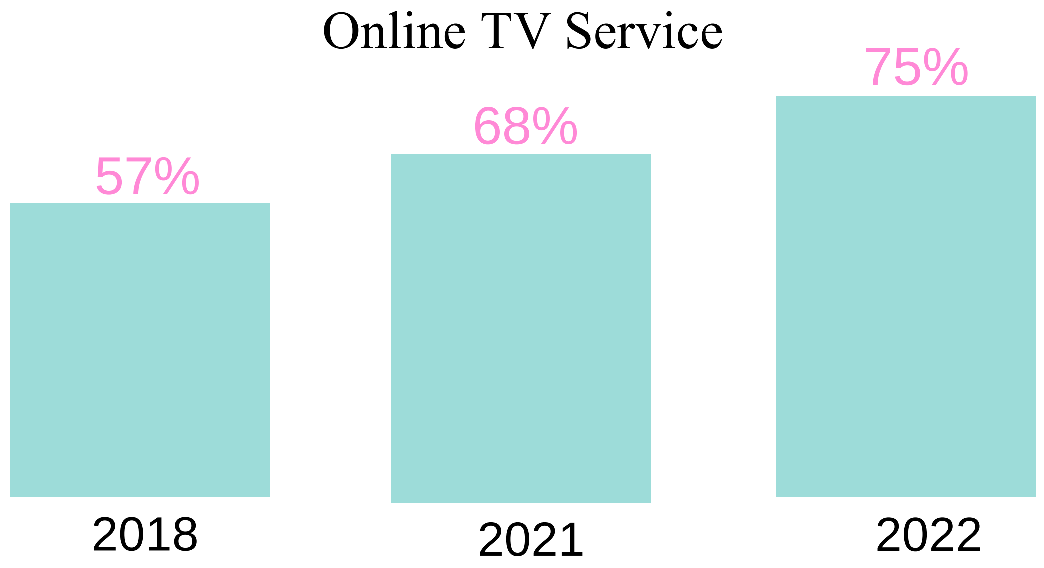
Base: All 15+

Ownership of Technology









Source: JNLR 2022-2 Audio Module (Apr'22 to Jun'22 – 3 mth data)Base: All 15+

Our Daily Environment

74%

Listen to audio at home

67%

Use a radio or music player to listen

39%

Listen to audio in car

34%

Use a smart phone to listen

Source: JNLR 2022-2 Audio Module (Apr'22 to Jun'22 – 3 mth data)
Base: All 15+

While the radio remains the most used device among listeners to audio content, use of other technology continues to grow

67%	34%	9%	9%	5%	3%	4%
USED RADIO/MUSIC PLAYER	USED A SMART PHONE	USED A SMART SPEAKER	USED A PC/LAPTOP	USED A TABLET	USED A TV	USED OTHER SYSTEM

Any Audio Activity – Average Day

Source: JNLR 2022-2 Audio Module (Apr'22 to Jun'22 – 3 mth data)
Base: All 15+

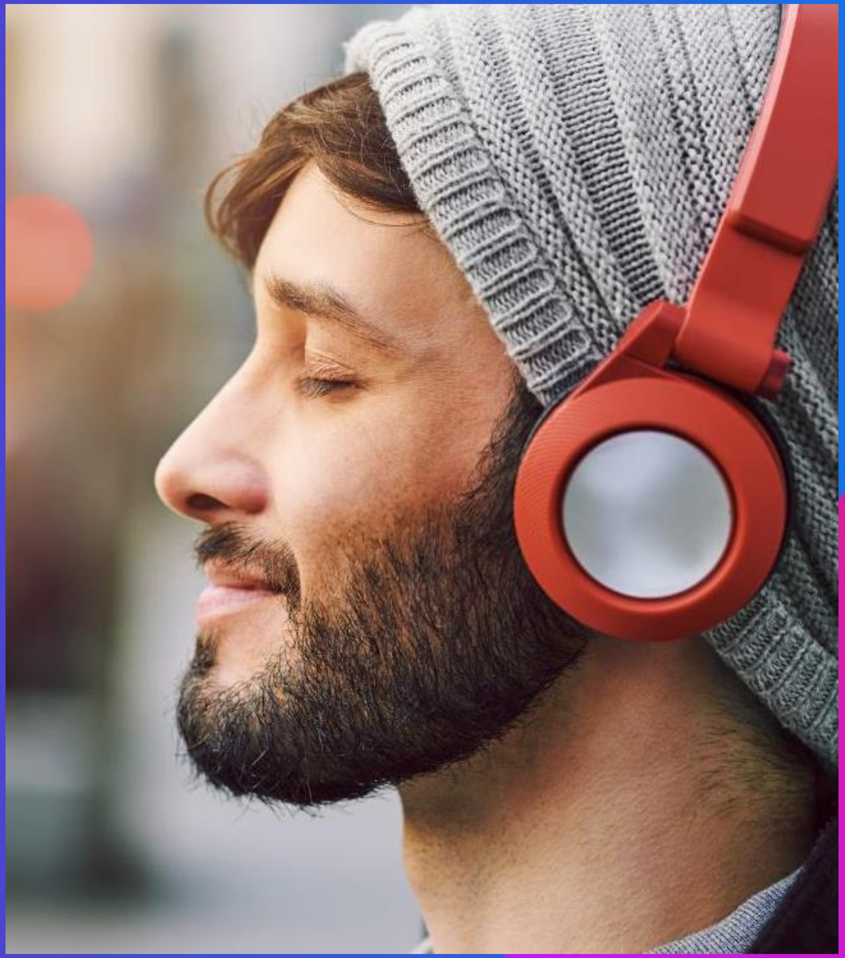
Most listening to audio material happens at home

74%	39%	11%	9%	2%	1%
AT HOME	IN CAR	WORK/SCHOOL COLLEGE	WALKING/ CYCLING/ RUNNING	BUS/ TRAIN/DART	SOMEONE ELSE'S HOME

Any Audio Activity – Average Day

Source: JNLR 2022-2 Audio Module (Apr'22 to Jun'22 – 3 mth data)
Base: All 15+

The audio market



Vast majority of the population **88.7%** are active in the audio market every day

Source: JNLR 2022-2 Audio Module (Apr’22 to Jun’22 – 3 mth data)
Base: All 15+

Listening increases to 96.7% in the past week - almost universal listening to audio content on a weekly basis.

Source: JNLR 2022-2 Audio Module (Apr’22 to Jun’22 – 3 mth data)
Base: All 15+

90.2% listen to live radio weekly.

58.1% listen to on-demand, online audio weekly.

Source: JNLR 2022-2 Audio Module (Apr’22 to Jun’22 – 3 mth data)
Base: All 15+

The audio market is dominated by live radio

90%
LISTEN TO LIVE RADIO

40%
LISTEN TO MUSIC STREAMING

35%
LISTEN TO YOUTUBE MUSIC

18%
LISTEN TO OWN MUSIC

6%
LISTEN TO PLAY BACK RADIO

23%
LISTEN TO PODCASTS

Weekly Listening

Source: JNLR 2022-2 Audio Module (Apr’22 to Jun’22 – 3 mth data)
Base: All 15+

The relatively rapid growth in music streaming has not been at the expense of radio. In fact, streaming has supplanted our own music archives

	2018	2019	2021	2022
Radio	94%	93%	92%	90%
Music Streaming	22%	26%	37%	**40%**
YouTube Music	n/a	36%	36%	35%
Own Music	**38%**	36%	22%	**18%**
Listen Back	11%	6%	6%	6%
Any Podcast *		9%	17%	23%

Source: JNLR 2022-2 Audio Module (Apr'22 to Jun'22 – 3 mth data)

**Change in question text in regard to podcasting – not directly comparable but indicative of trend*

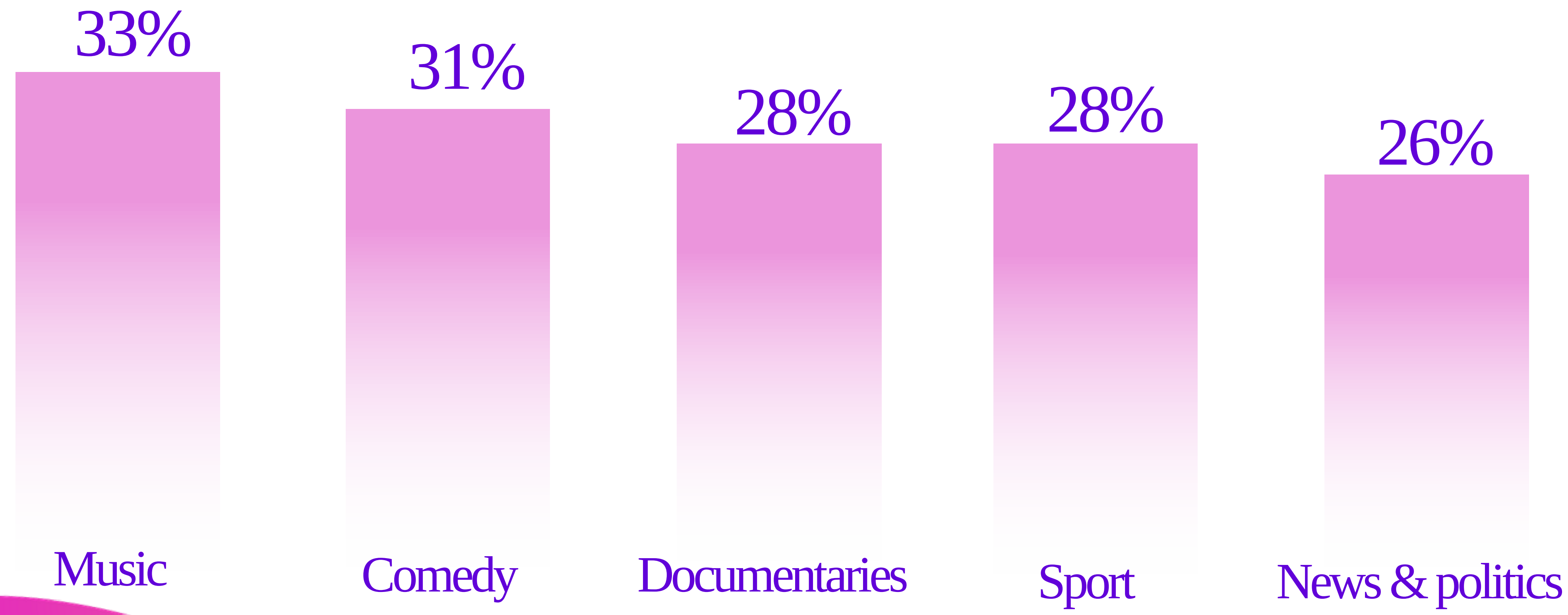
Base: All 15+

Live radio is still hugely important to all age cohorts

Average Week	15+	15-24	25-44	45-64	65+
	%	%	%	%	%
Live Radio	90	85	90	92	92
Listen Back to Irish Radio	6	7	9	5	2
Music Streaming (Spotify & Other)	40	82	52	27	6
YouTube Music	35	66	44	26	9
Own Music	18	24	17	18	12
Any Podcast	23	32	32	18	5
- Irish Podcast	17	23	26	14	5
- International Podcast	14	19	20	11	2

Source: JNLR 2022-2 Audio Module (Apr'22 to Jun'22 – 3 mth data)
Base: All 15+ x age group

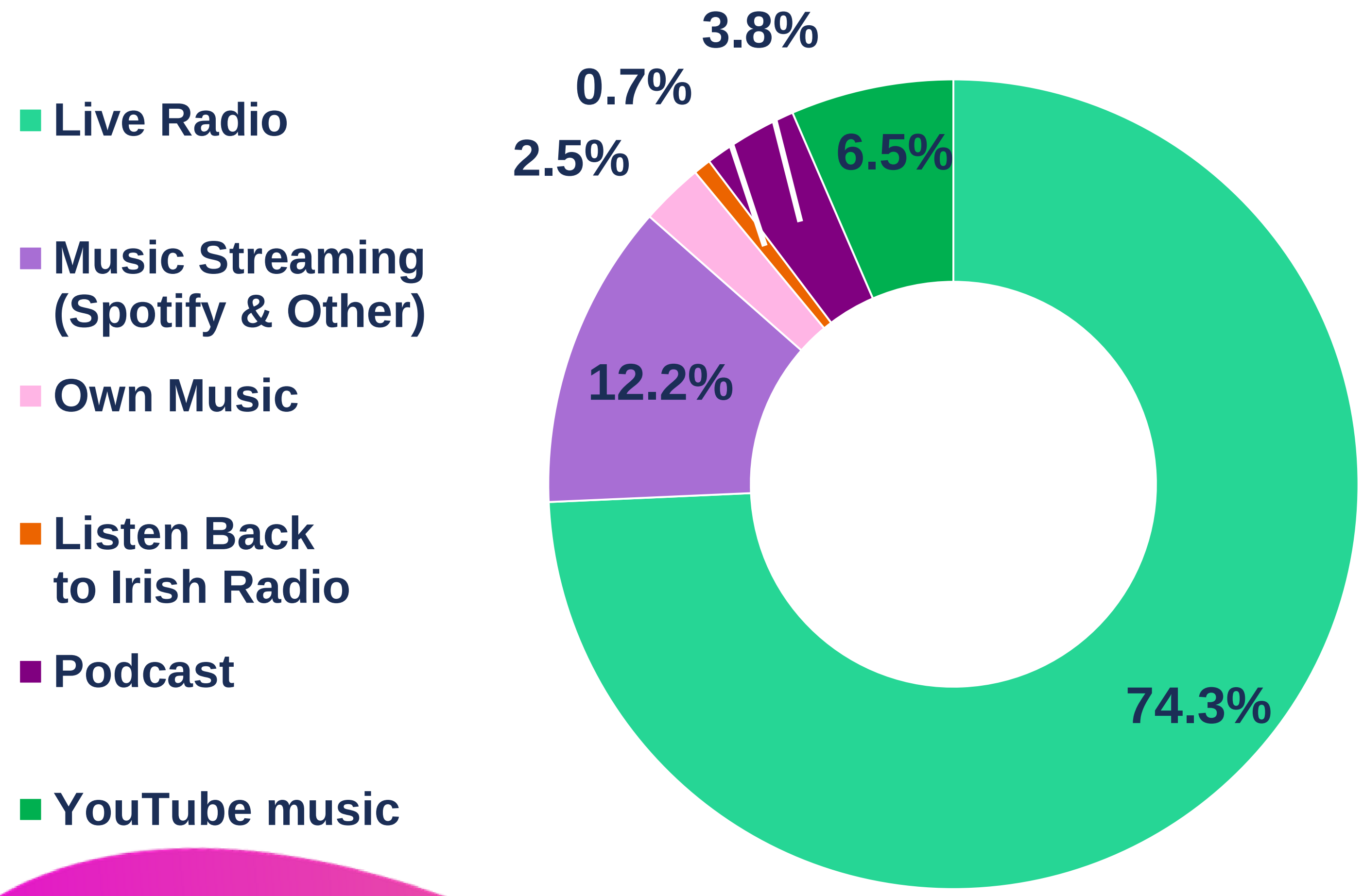
The most popular podcasts are music and comedy



Source: JNLR 2022-2 Audio Module (Apr'22 to Jun'22 – 3 mth data)
Base: All podcast listeners - past week

The Daily Picture

While many tune into on-demand online audio daily they spend a lot more time listening to radio

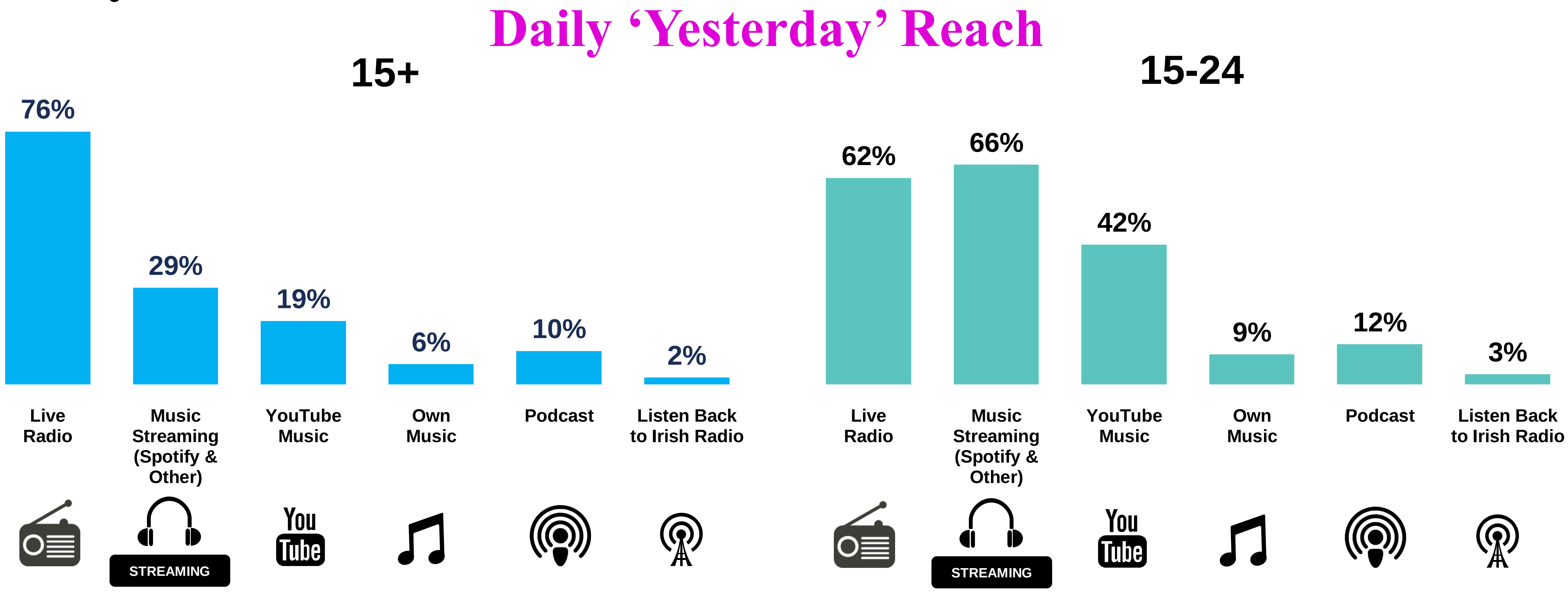


74.3%
Live **Radio Share**

Share of audio time spent daily

Source: JNLR 2022-2 Audio Module (Apr'22 to Jun'22 – 3 mth data)
Base: All Adults 15+ - estimate share of time spent

Radio is still the #1 choice, by a significant margin. 15-24 year olds still spend more time engaged with radio than any other format



Source: JNLR 2022-2 Audio Module (Apr'22 to Jun'22 – 3 mth data)
Base: All 15+

Audio – Estimated Share of Time Spent Daily

	15+	15-24	25-44	45-64	65+
	%	%	%	%	%
Live Radio	74.3	42.1	67.1	84.2	95.2
Listen Back to Irish Radio	0.7	0.4	1.1	0.5	0.4
Any Radio *(Live or listen back)*	75.0	42.5	68.2	84.7	95.6
Music Streaming (Spotify & Other)	12.2	33.7	15.5	5.4	1.0
YouTube Music	6.5	15.1	7.7	4.3	1.4
Own Music	2.5	4.0	2.3	2.6	1.6
Any Podcast	3.8	4.7	6.3	2.9	0.4
- Irish Podcast	2.1	2.2	3.9	1.4	0.3
- International Podcast	1.7	2.5	2.5	1.5	0.1

Source: JNLR 2022-2 Audio Module (Apr'22 to Jun'22 – 3 mth data)
Base: All 15+ x age groups

Appendix

- Some additional data

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Recap – Average Daily Minutes

x Head of Population

All 15+	15-24	25-44	45-64	65+
200	116	172	225	282

x Radio Listener

All 15+	15-24	25-44	45-64	65+
260	179	235	275	328

Radio's ability to engage audiences for more than 4 hours every day demonstrates how the medium has remained relevant over the years.

And with younger radio audiences, listening for at least 3 hours on average per day, radio has a sustainable future.

Source: JNLR 2021-2 Core Interview-(Jul'21 to Jun'22 – 12 mth data)
Base: All 15+ - Mins/hours - 7am to Midnight

Ownership of smart speakers continues to grow

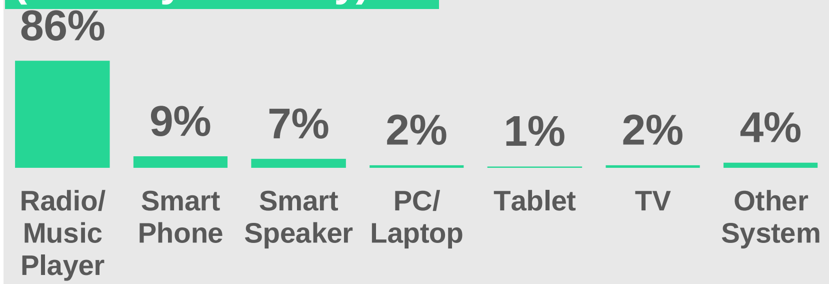
Ownership levels higher among the younger age groups but growing across all sectors.

15-24	25-44	45-64	65+
55%	50%	35%	16%

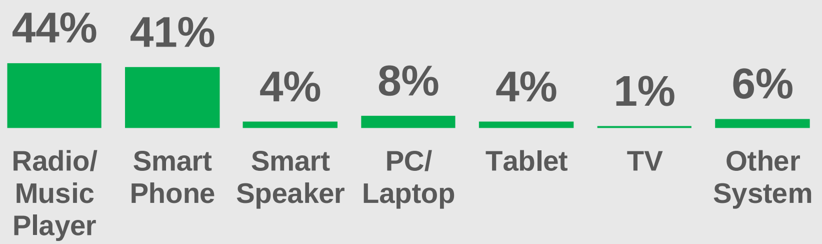
Source: JNLR 2022-2 Audio Module (Apr'22 to Jun'22 – 3 mth data)
Base: All 15+ x age group

The smart phone is key device among audiences of on-demand audio

Live Radio Audience (76.2% yesterday)

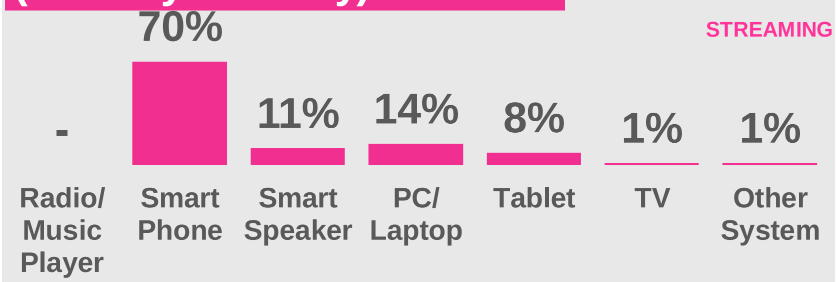


Own Music Audience (6.5% yesterday)

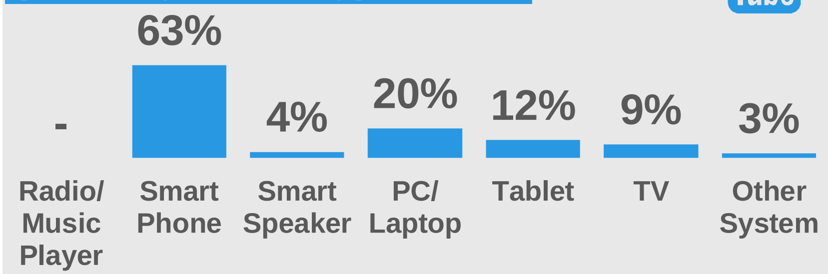


Music Streaming Audience (28.6% yesterday)

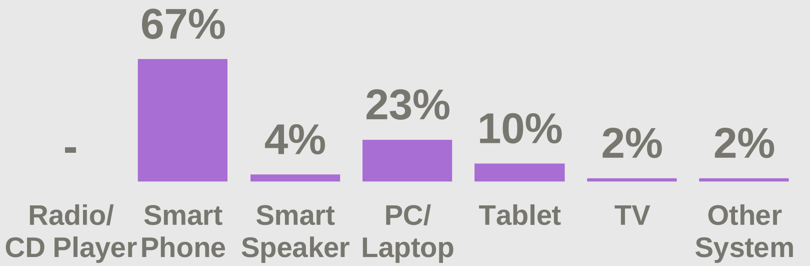
STREAMING



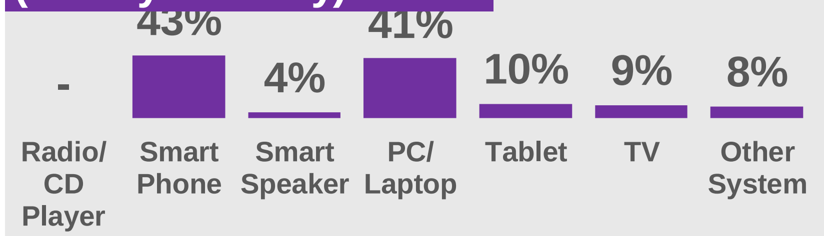
YouTube Music Audience (19.2% yesterday)



Podcast Audience (9.7% yesterday)



Listen Back Irish Radio Audience (2.1% yesterday)

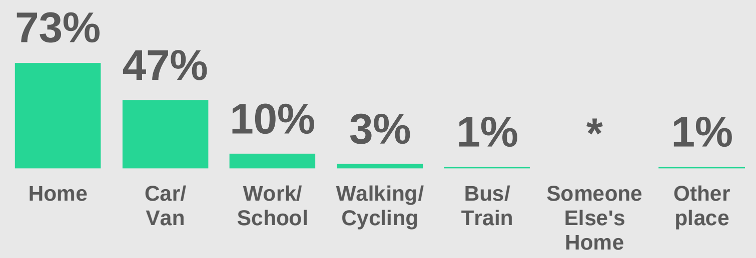


Note: Device analysis based on format audience yesterday - Some small base sizes

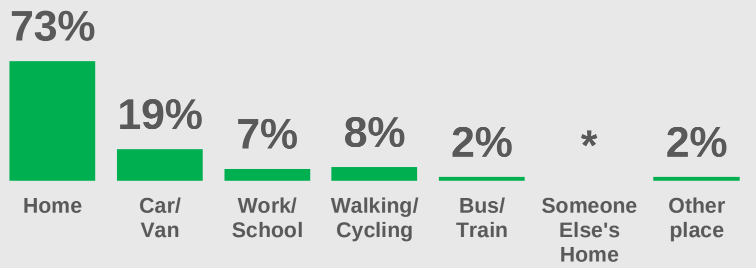
Source: JNLR 2022-2 Audio Module (Apr'22 to Jun'22 – 3 mth data)

Across all formats, most listening happens at home

Live Radio Audience (76.2% yesterday)

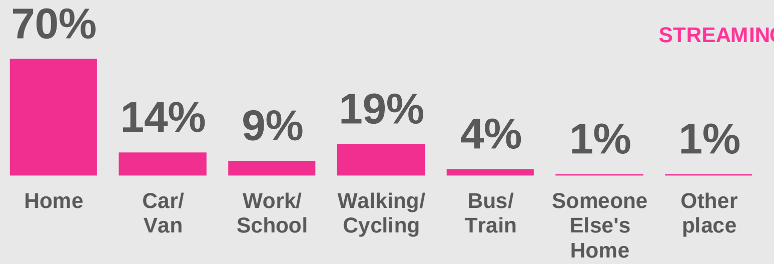


Own Music Audience (6.5% yesterday)

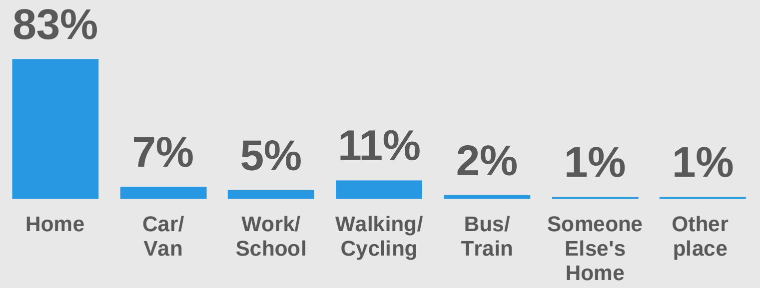


Music Streaming Audience (28.6% yesterday)

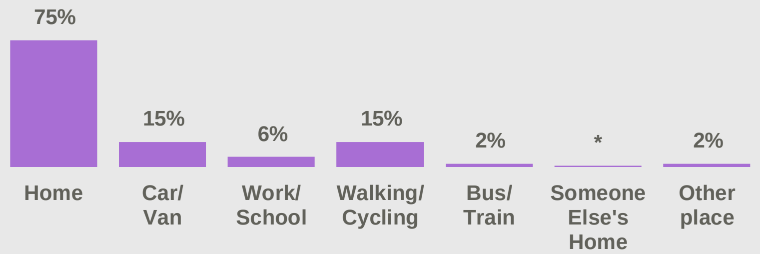
STREAMING



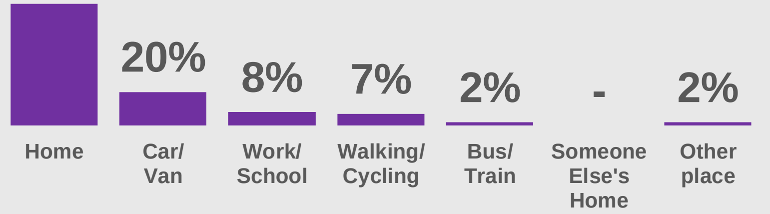
YouTube Music Audience (19.2% yesterday)



Podcast Audience (9.7% yesterday)



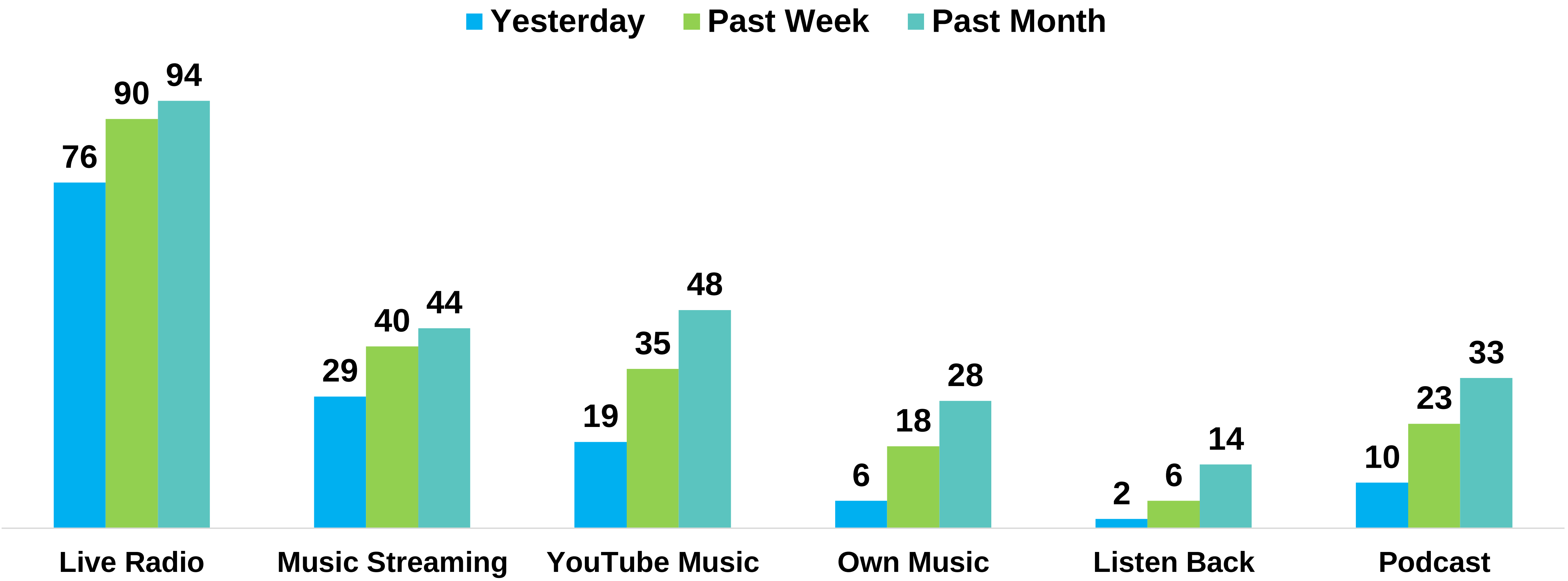
Listen Back Irish Radio Audience (2.1% yesterday)



Note: Location analysis based on format audience yesterday - Some small base sizes

Source: JNLR 2022-2 Audio Module (Apr'22 to Jun'22 – 3 mth data)

While on-demand may facilitate choice it requires action (and sometimes subscription) – hence engagement by listeners to on-demand formats is less regular than for live radio. For the smaller media formats occasional listeners extend the monthly reach.



Source: JNLR 2022-2 Audio Module (Apr'22 to Jun'22 – 3 mth data)
Base: All 15+

Podcast Genre Listened to regularly

All Weekly Podcast Listeners	All	15-24	25-44	45-64	65+
	%	%	%	%	%
Music	33	44	33	24	26
Comedy	31	33	32	28	24
Sport	28	30	28	24	26
Documentaries	28	14	28	36	48
News/Politics	26	18	23	37	46
Current Affairs/Economics	24	15	24	32	31
Health & Wellbeing	19	13	21	22	17
Entertainment (Radio, TV, Movies, Gaming)	18	25	18	15	3
True Crime	17	11	18	20	11
Lifestyle/Living/Fitness	15	20	14	13	7
Family/Children	4	1	7	3	-

Source: JNLR 2022-2 Audio Module (Apr’22 to Jun’22 – 3 mth data)
Base: All podcast listeners – past week

Notes on report

This report is sourced from JNLR data collected in Quarter 2 2022 (April to June 2022).

The data in this report is based on a large national sample of 3,110 interviews, conducted in home, across all radio franchise areas, among a sample of individuals aged 15+.

The interview captured information on radio and other audio content.

The radio data shown in Charts 3,10,11,12 is based on the core interview and key analyses presented in July 2022, based on 12 month data, (July 2021 to June 2022).

Data on the broader audio market is based on the JNLR *Media Module*, implemented in tandem with the core interview during the specific 3 month period, April to June 2022.

The in-home, face to face, methodology ensures inclusion of all age and regional cohorts and both offline and online communities.