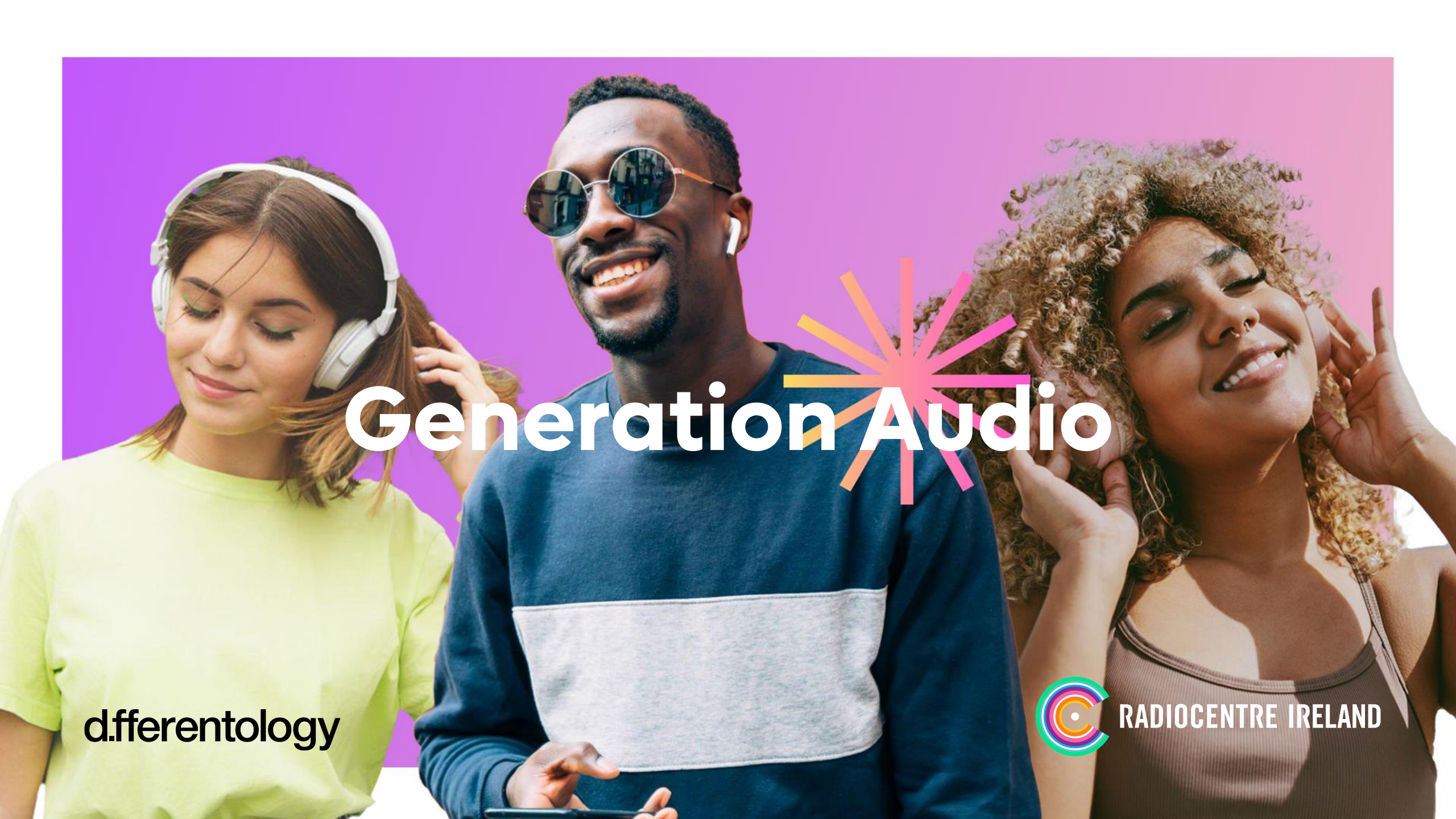


A vibrant purple background features three diverse young adults. On the left, a woman with brown hair wears large white headphones and a bright yellow-green t-shirt, looking down. In the center, a man with a beard and sunglasses wears a blue and grey sweatshirt and white earbuds, smiling and holding a smartphone. On the right, a woman with curly hair and a nose ring wears a brown tank top and large pink headphones, smiling with her hands near her face. A colorful starburst graphic is positioned behind the central text.

Generation Audio

d.fferentology



RADIOCENTRE IRELAND

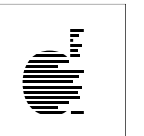
Objectives

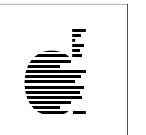
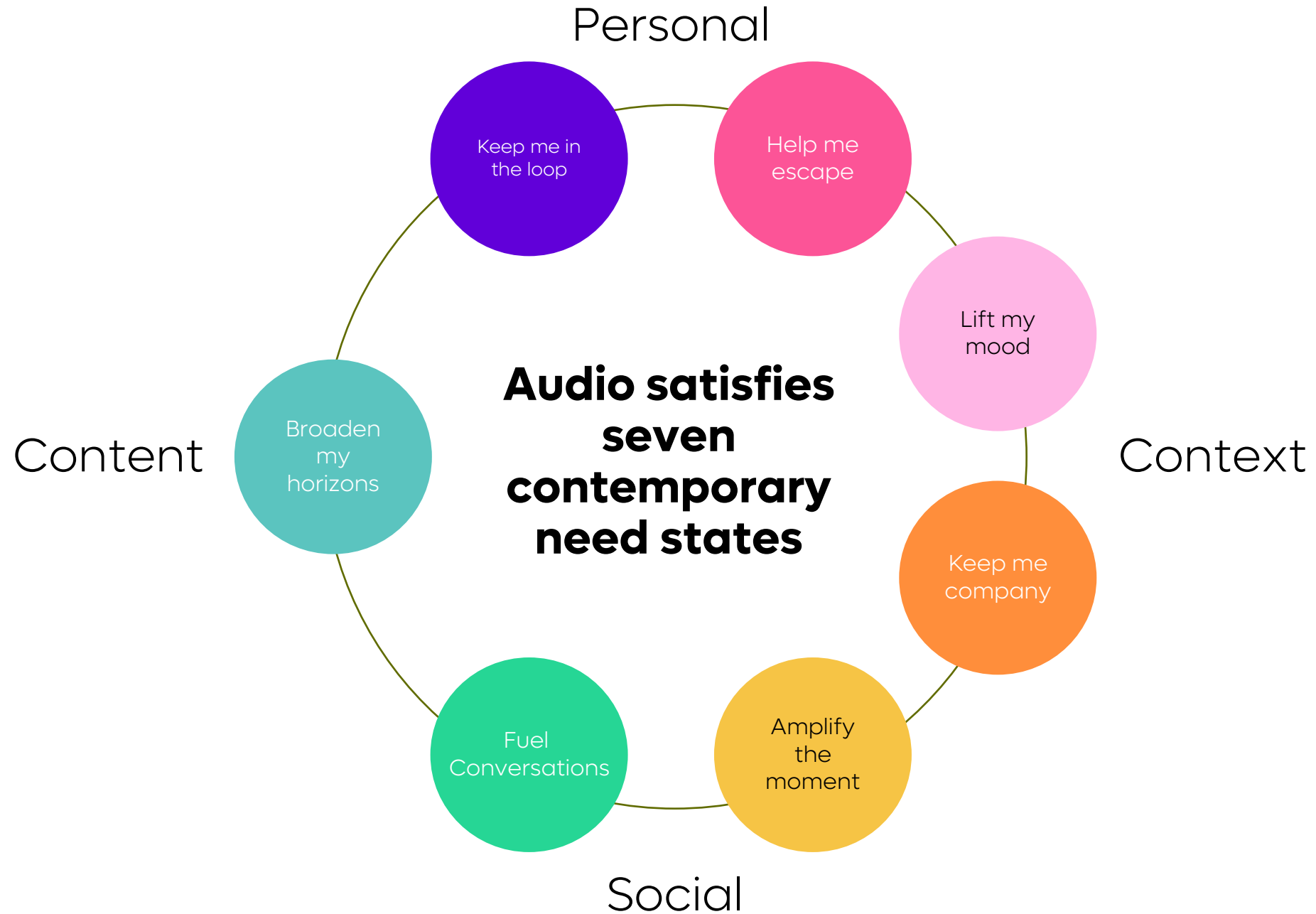
- 1 Better understand the commercial audio landscape in Ireland
- 2 Help inform future strategy and planning when using audio as part of media mix





Key Findings





To Keep Me
Company.

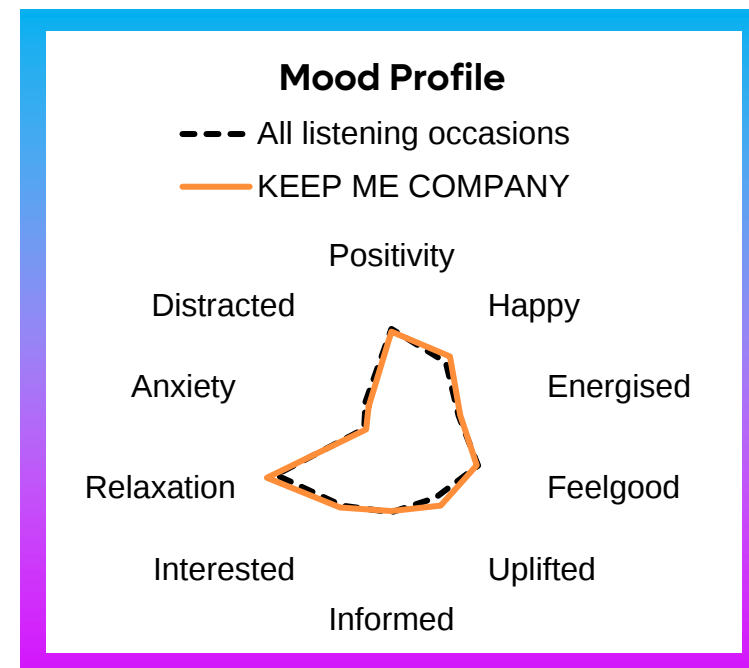


RADIOCENTRE IRELAND

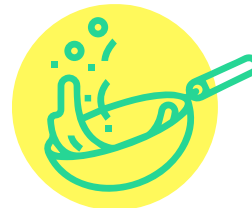
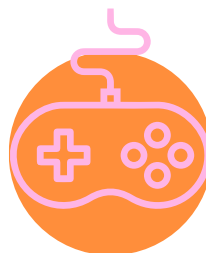
Keep me company

Radio has been more than just a source of music;
it has been a trusted friend in times of solitude
and a bridge to the outside world"

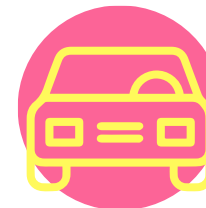
- M, Galway



Mainly Alone
or with Partner Or Children

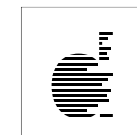


Working/Studying, Gaming, Cooking, Eating/Drinking



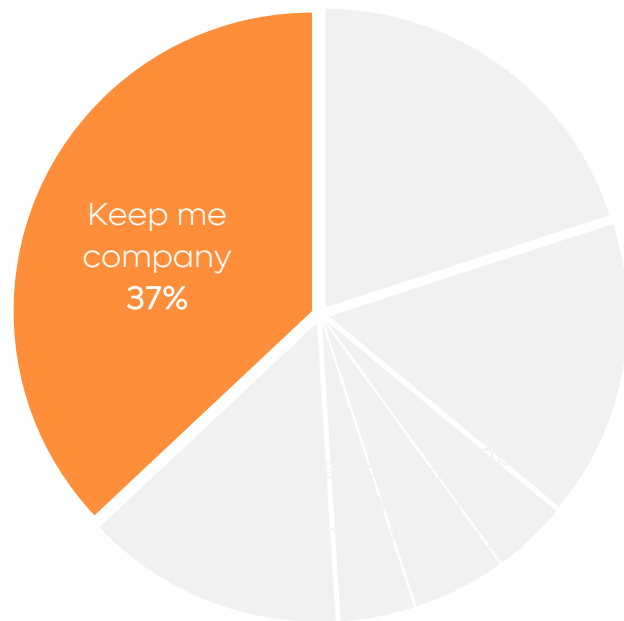
55% At home

23% in-car



Keep me company

37% of total listening time



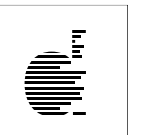
Share of total listening time



weekly reach

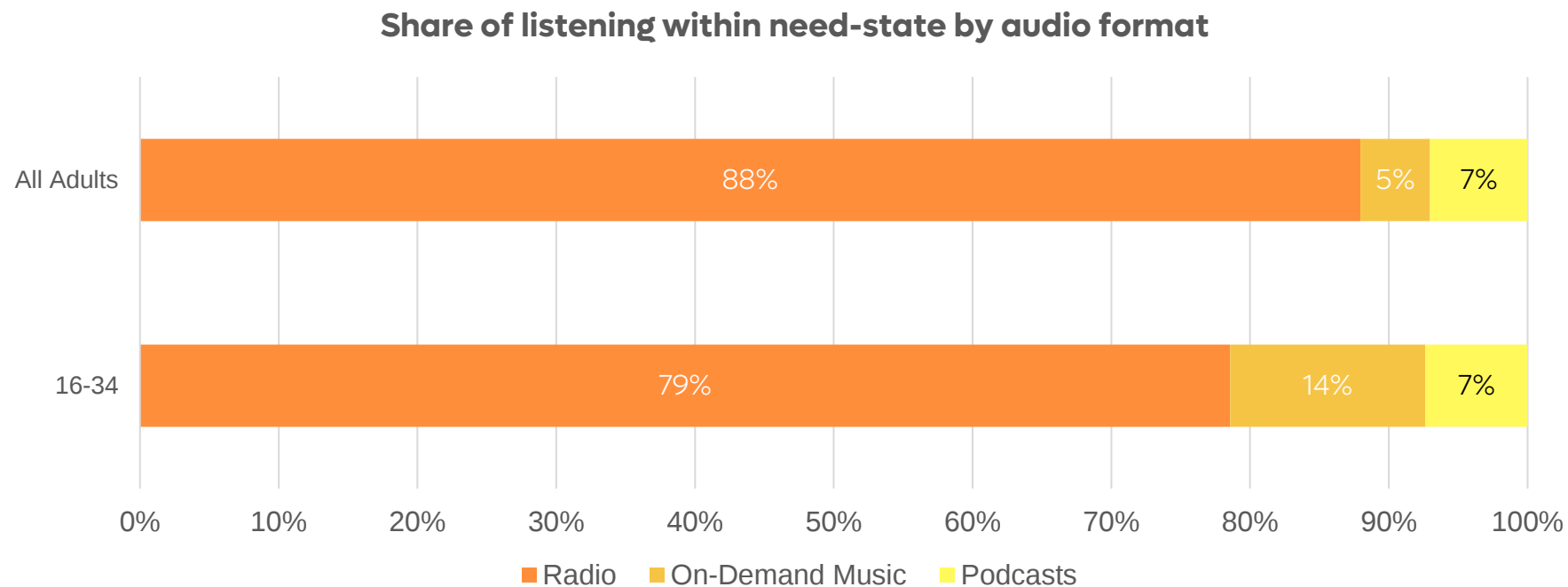


Av. length of listening occasion



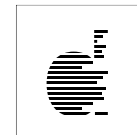
Keep me company

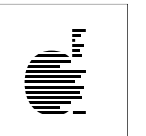
37% of total listening time



Source: Radiocentre Ireland/Differentology 2023

Base: 64,945 commercial listening minutes





To Help me
Escape Everyday
Life.

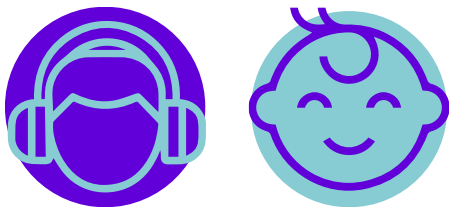
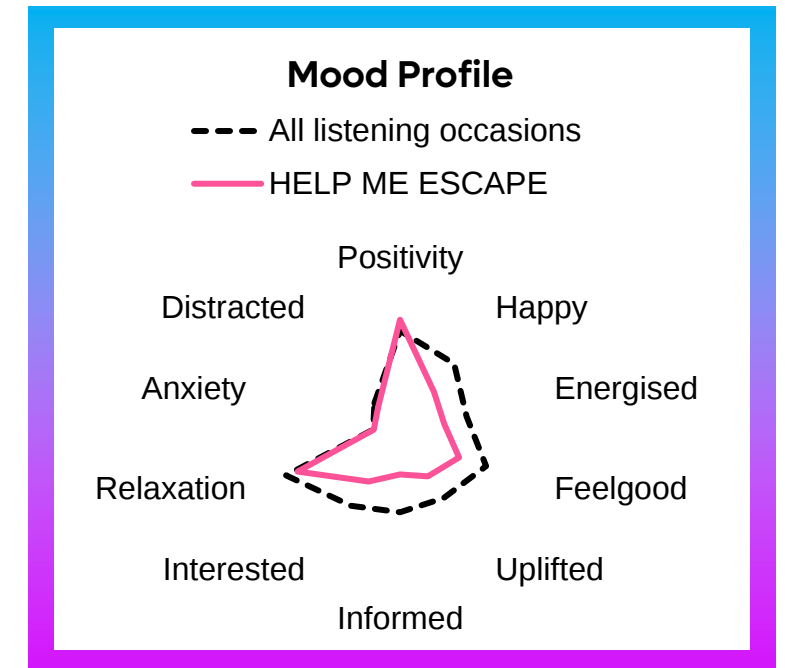


RADIOCENTRE IRELAND

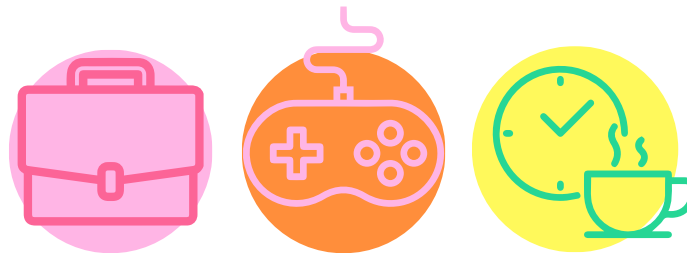
Help me escape

Radio serves as a constant companion in my life, offering a familiar voice and music that keeps me company throughout the day"

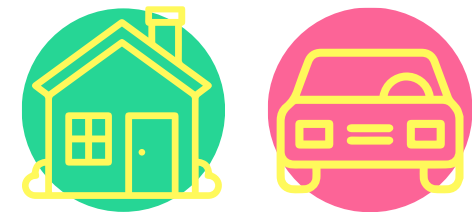
- M, Galway



Mainly Alone
or with Partner Or Children

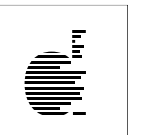


Working/Studying, Hobbies, Relaxing,
nothing in particular



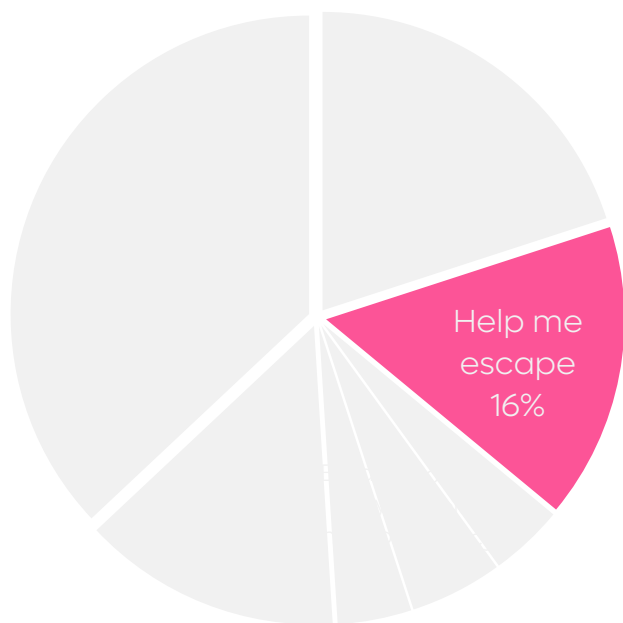
71% At home

14% in-car

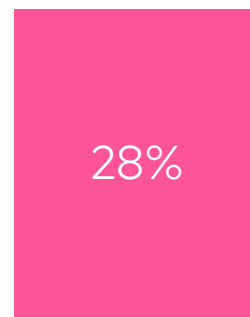


Help me escape

16% of total listening time



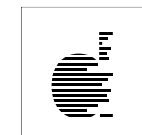
Share of total listening time



weekly reach

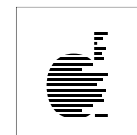
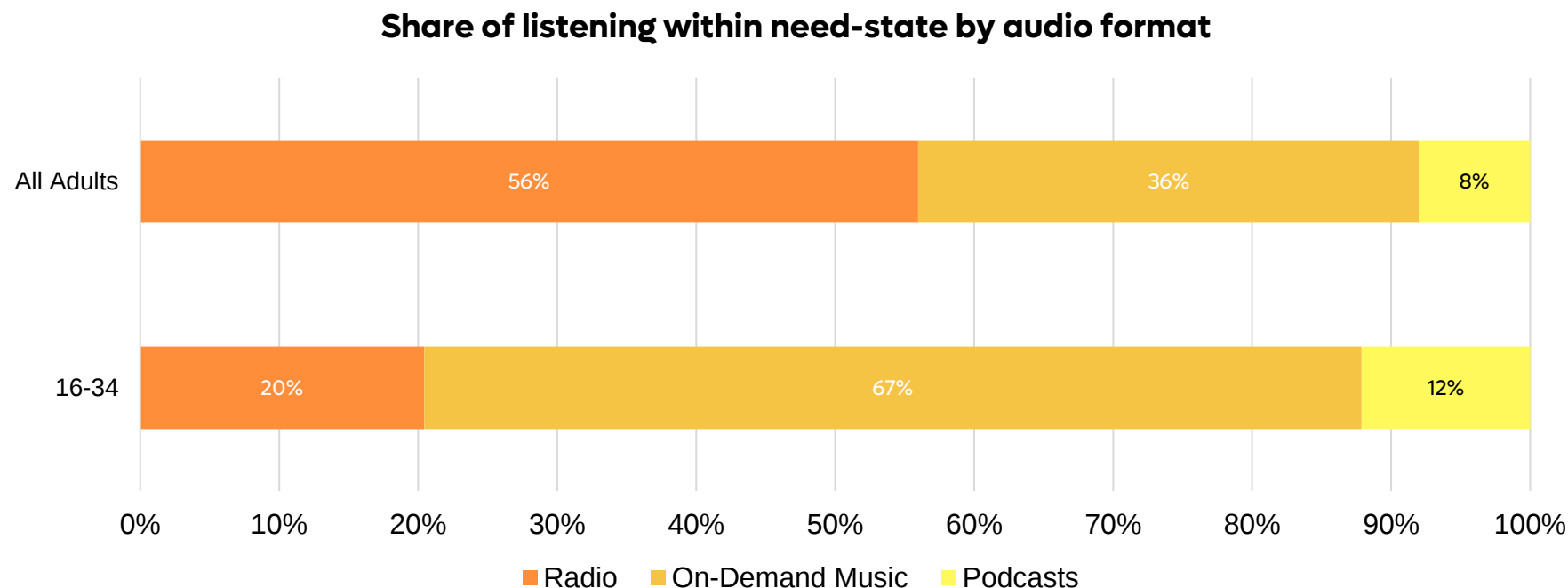


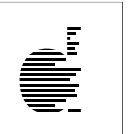
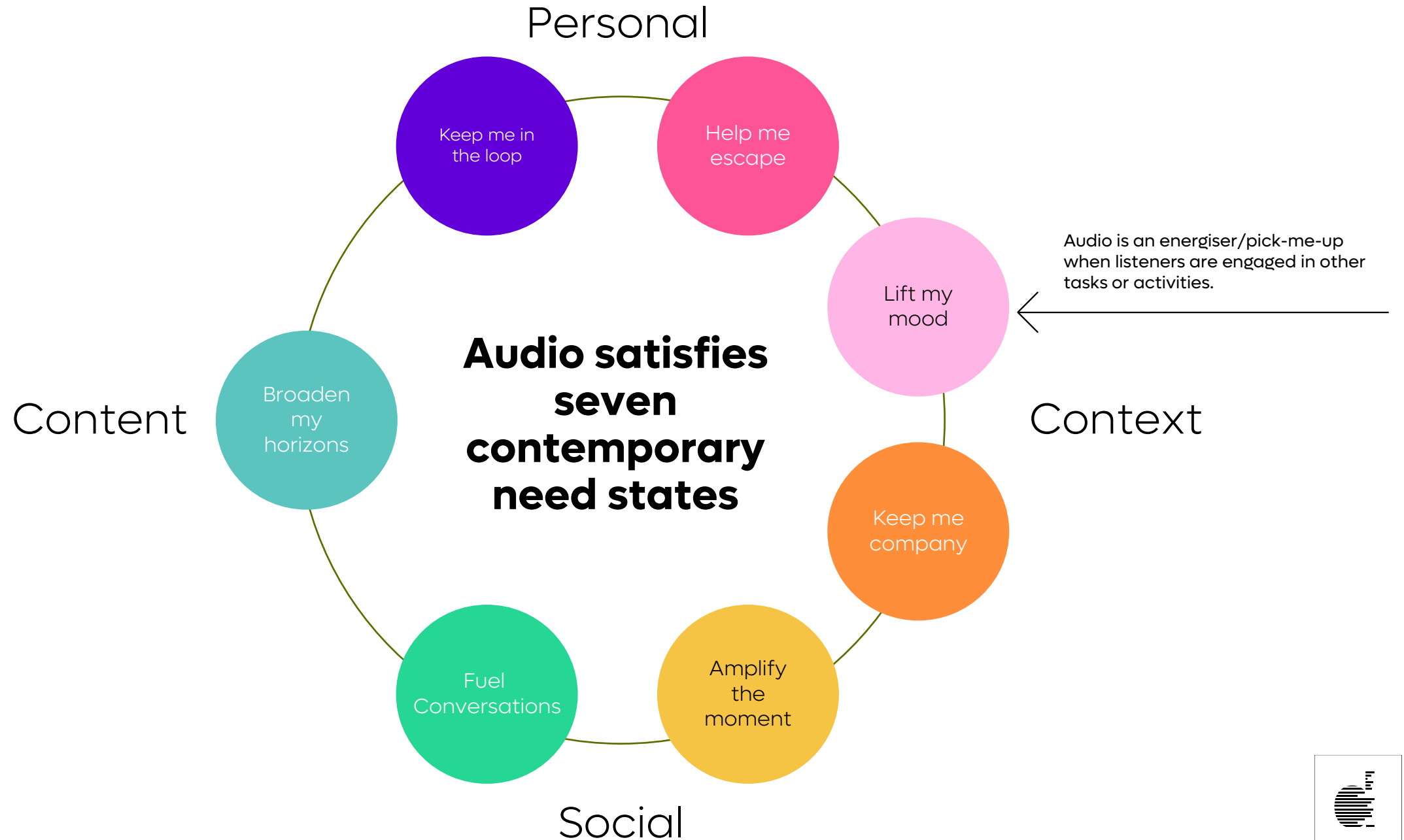
Av. length of listening occasion



Help me escape

16% of total listening time

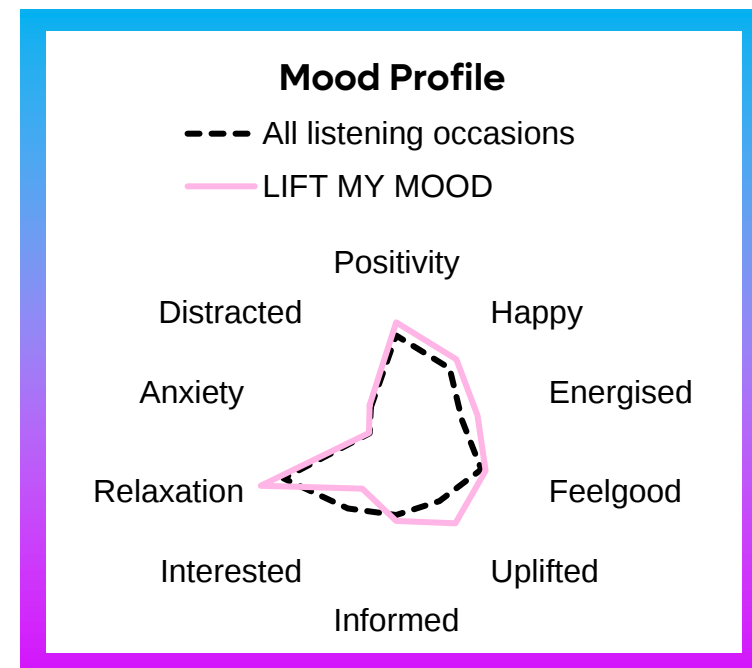




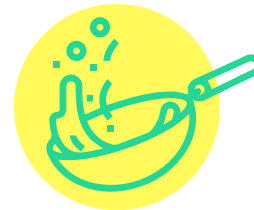
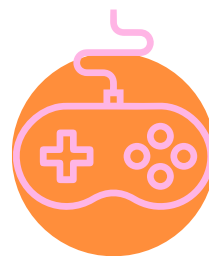
Lift my mood

I love listening to the breakfast show in the morning because I love the energy of the radio hosts and their vibe always puts me in a good mood to start my day."

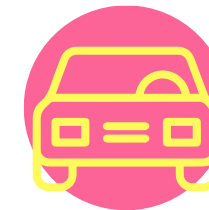
- F, Dublin



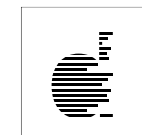
Mainly Alone
or with Colleagues Or Children



Working/Studying, Commuting, Hobbies, Cooking,
Shopping Online

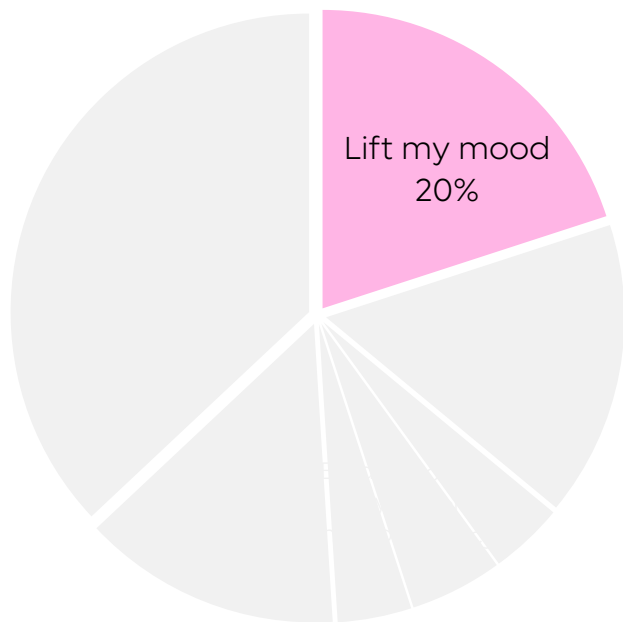


54% At home, 15% at work, 14% in-car

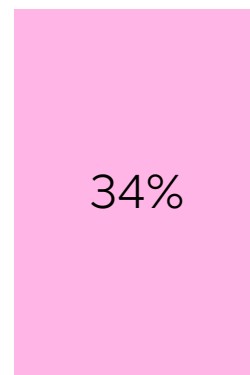


Lift my mood

20% of total listening time



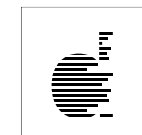
Share of total listening time



weekly reach

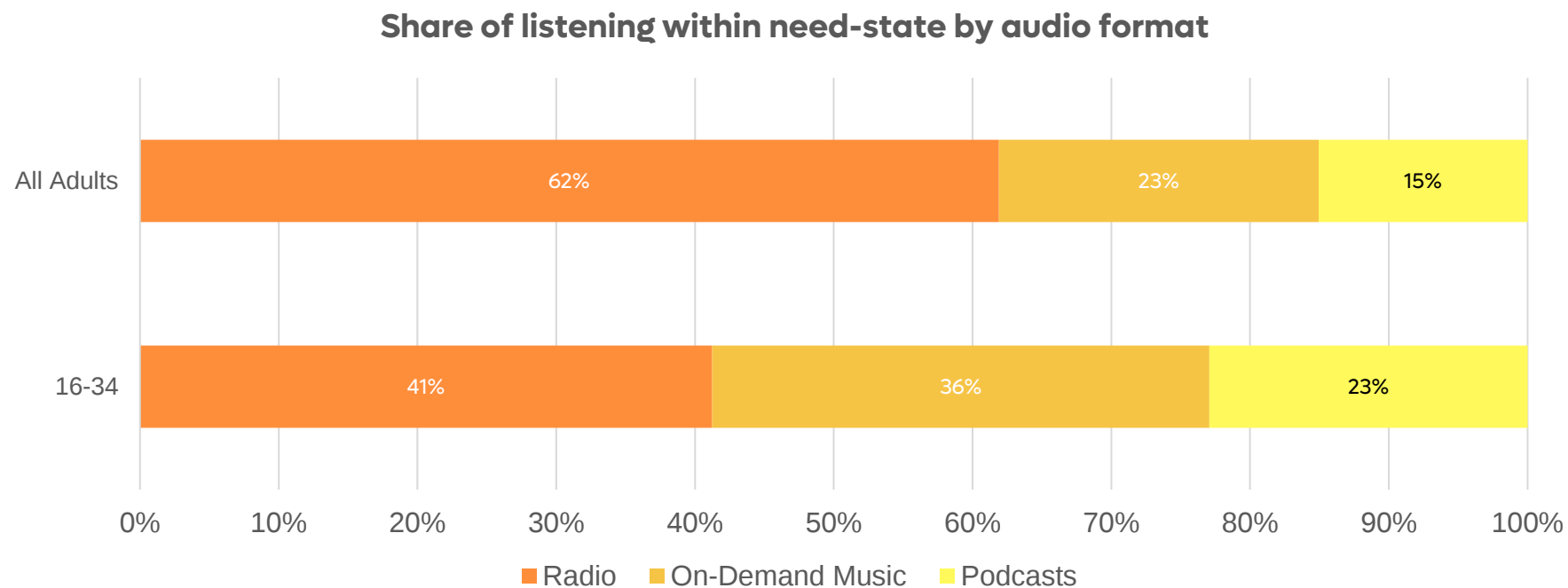


Av. length of
listening occasion



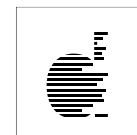
Lift my mood

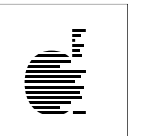
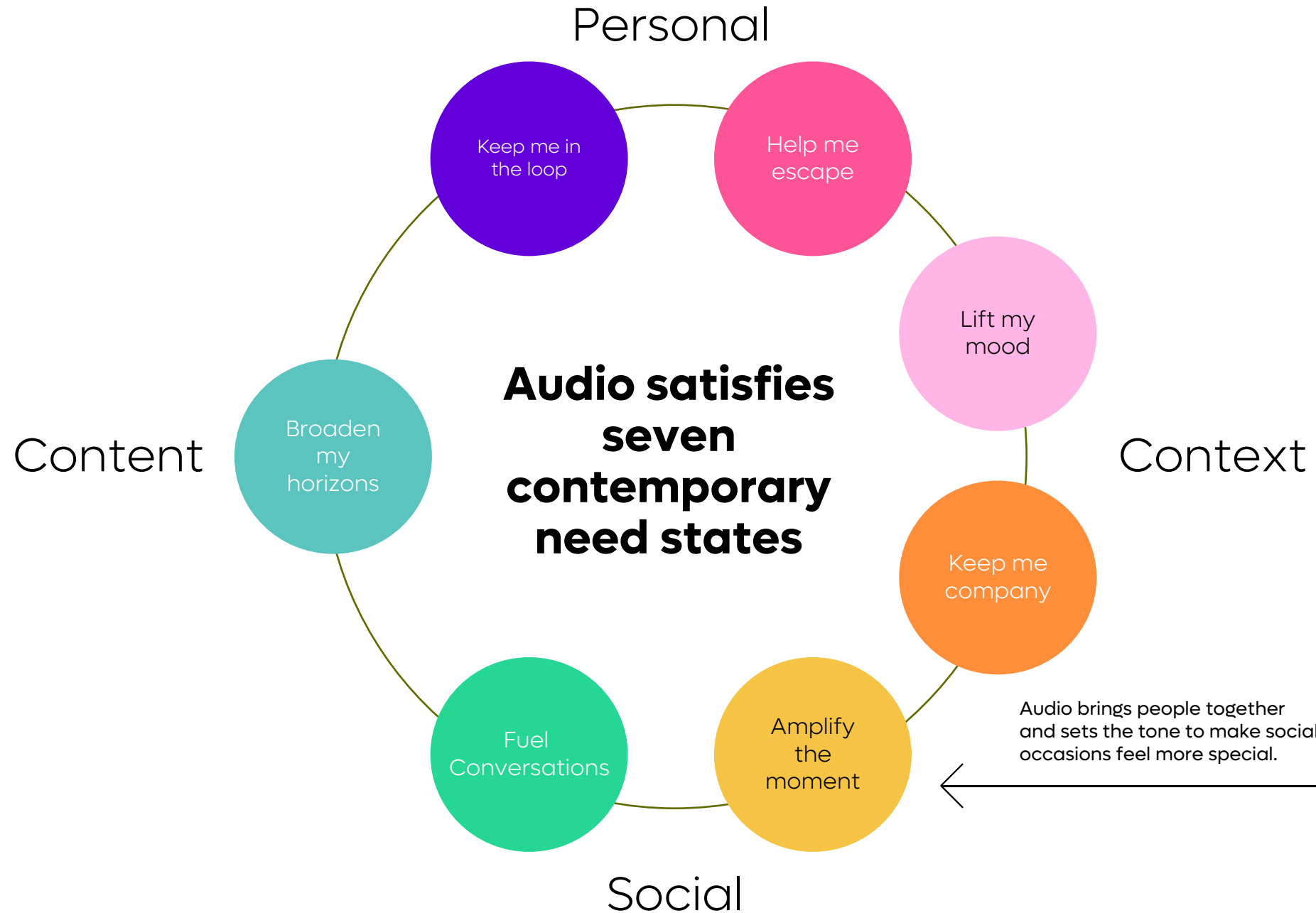
20% of total listening time



Source: Radiocentre Ireland/Differentology 2023

Base: 13,064 commercial listening minutes

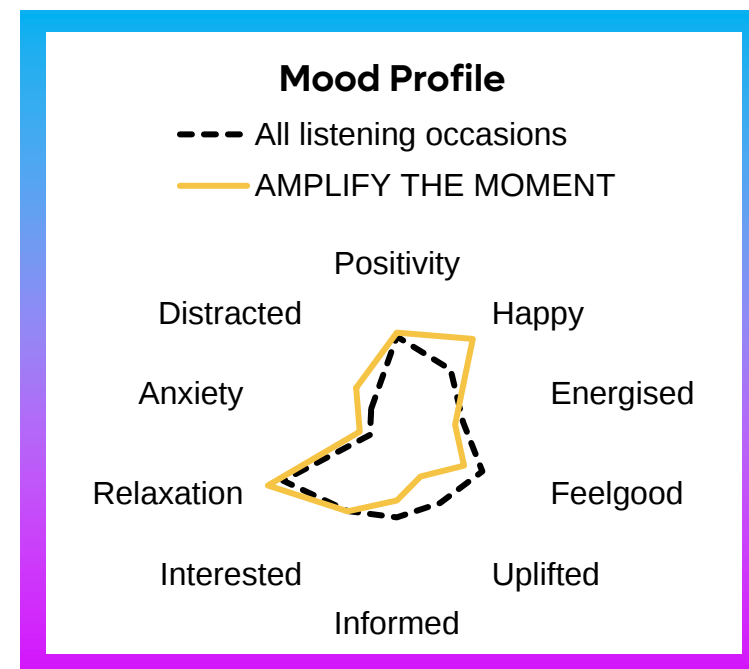




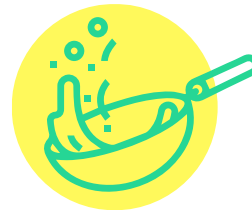
Amplify the moment

It [radio] created a happy vibe with the music we had on, the mood was lovely and jolly, we enjoyed hanging out together and the radio was like a soundtrack to our wonderful afternoon."

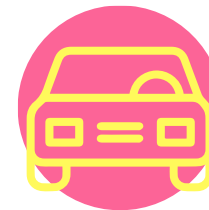
- F, Galway



With Friends, Partners/Spouse

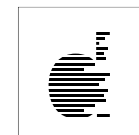


Working/Studying, Cooking, Eating/Drinking, HH Admin



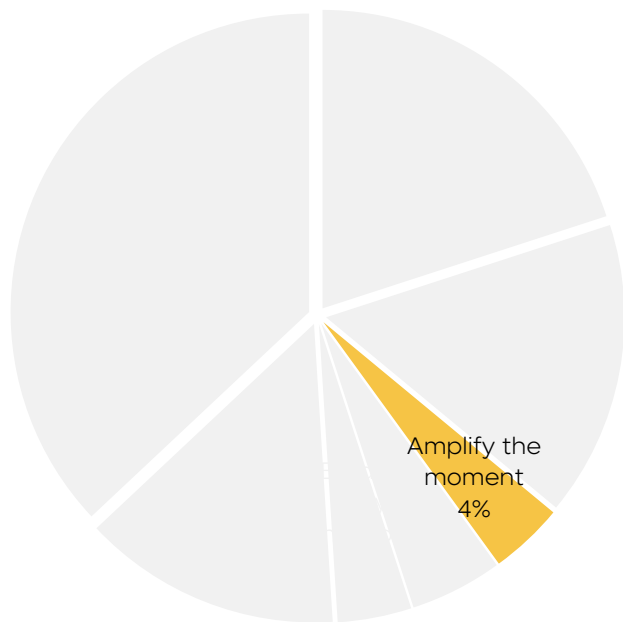
65% At home

19% in-car

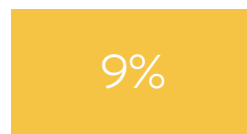


Amplify the moment

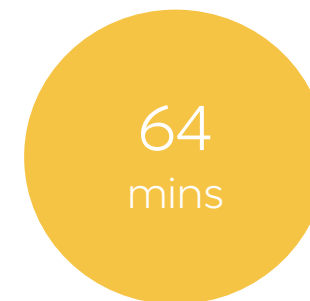
4% of total listening time



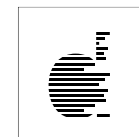
Share of total listening time



weekly reach

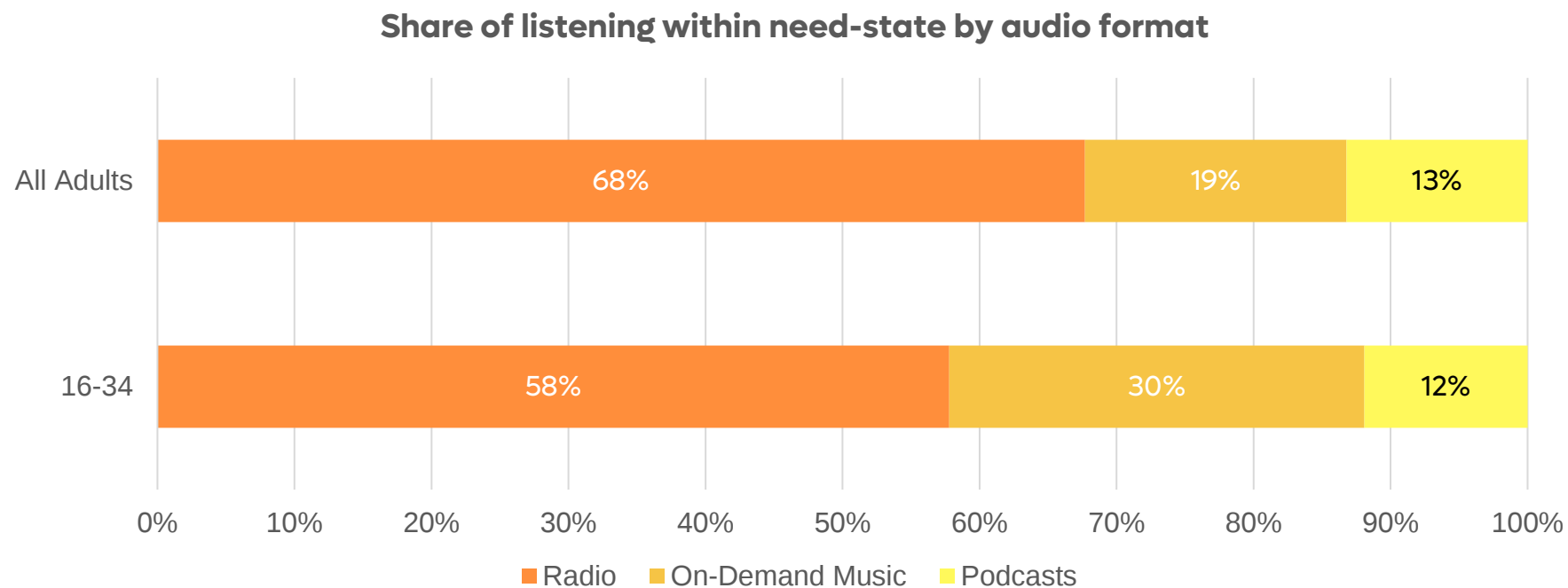


Av. length of
listening occasion



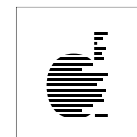
Amplify the moment

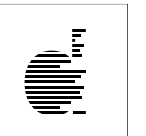
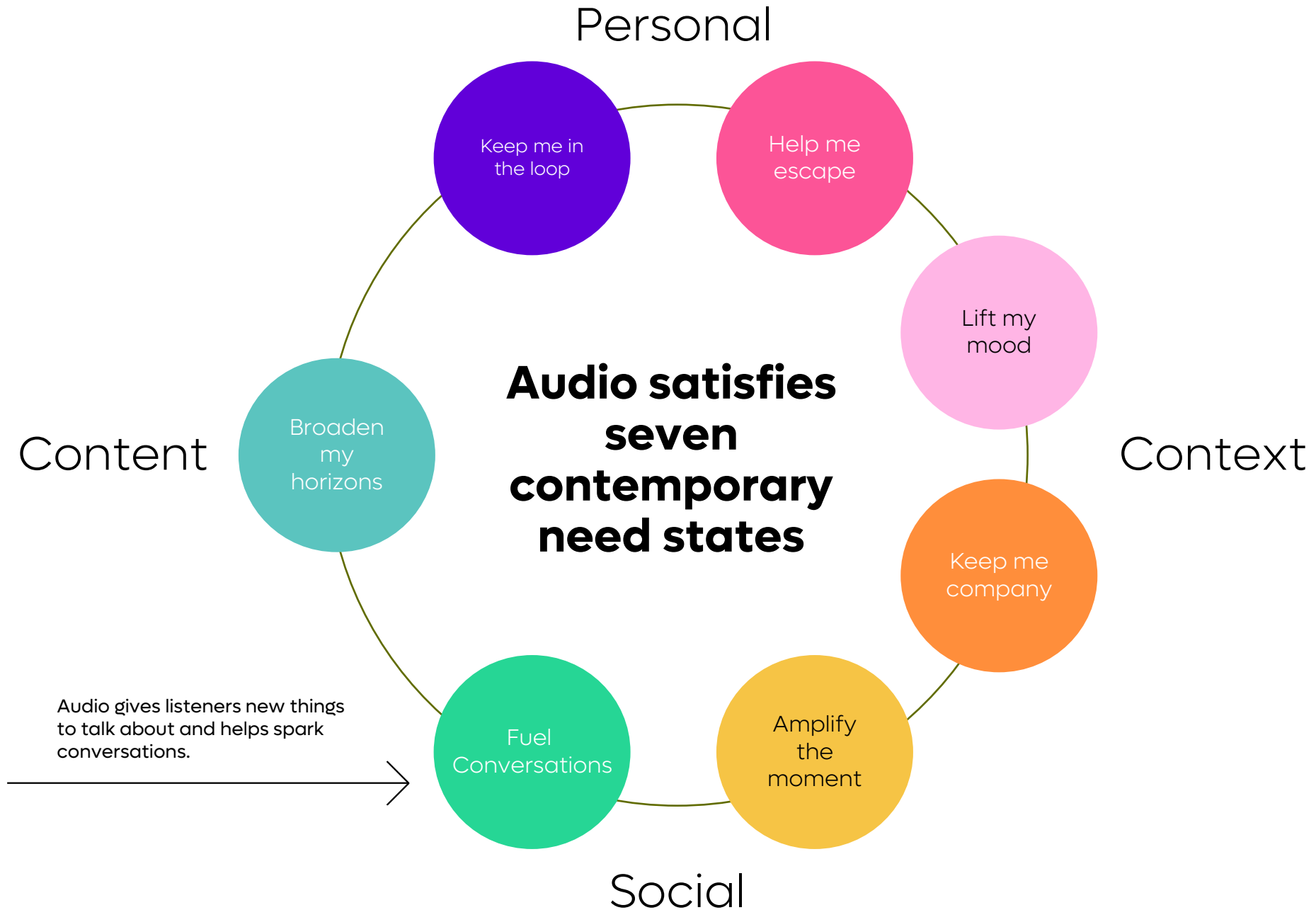
4% of total listening time



Source: Radiocentre Ireland/Differentology 2023

Base: 2825 commercial listening minutes

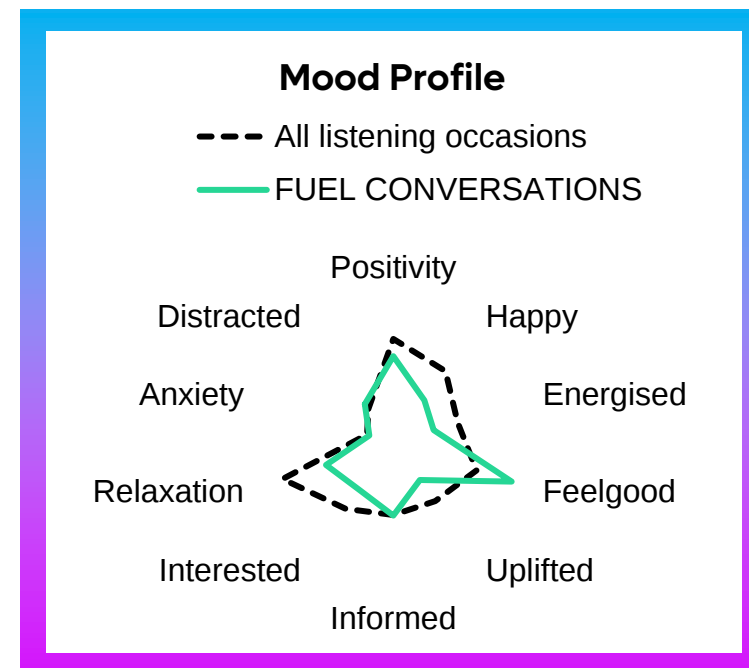




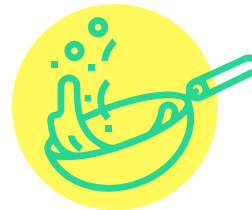
Fuel conversations

The radio is a nice way to talk about things the radio brings up as conversation pieces, so you can talk about between the two of you when you're in the car with anyone."

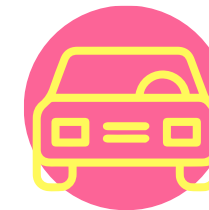
- M, Limerick



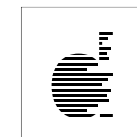
With Colleagues, Family, Friends,
Children, Partner



Working/Studying, Browsing the internet, Eating/Drinking

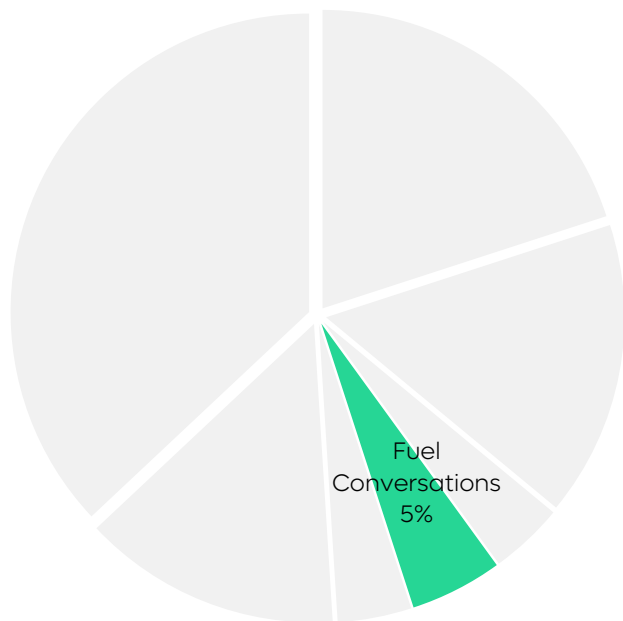


55% At home, 31% at work, 12% in-car

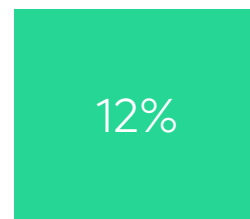


Fuel conversations

5% of total listening time



Share of total listening time



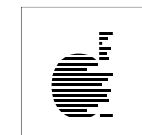
weekly reach



Av. length of listening occasion

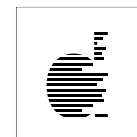
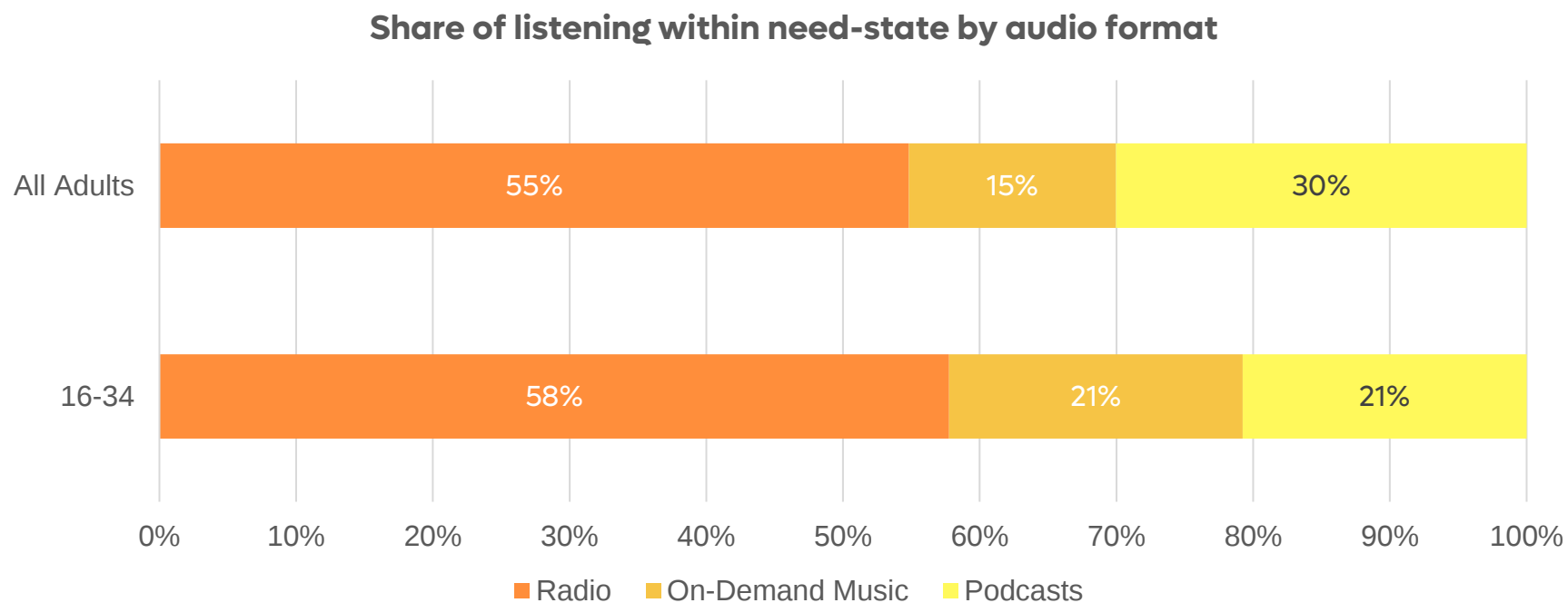
Source: Radiocentre Ireland/Differentology 2023

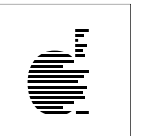
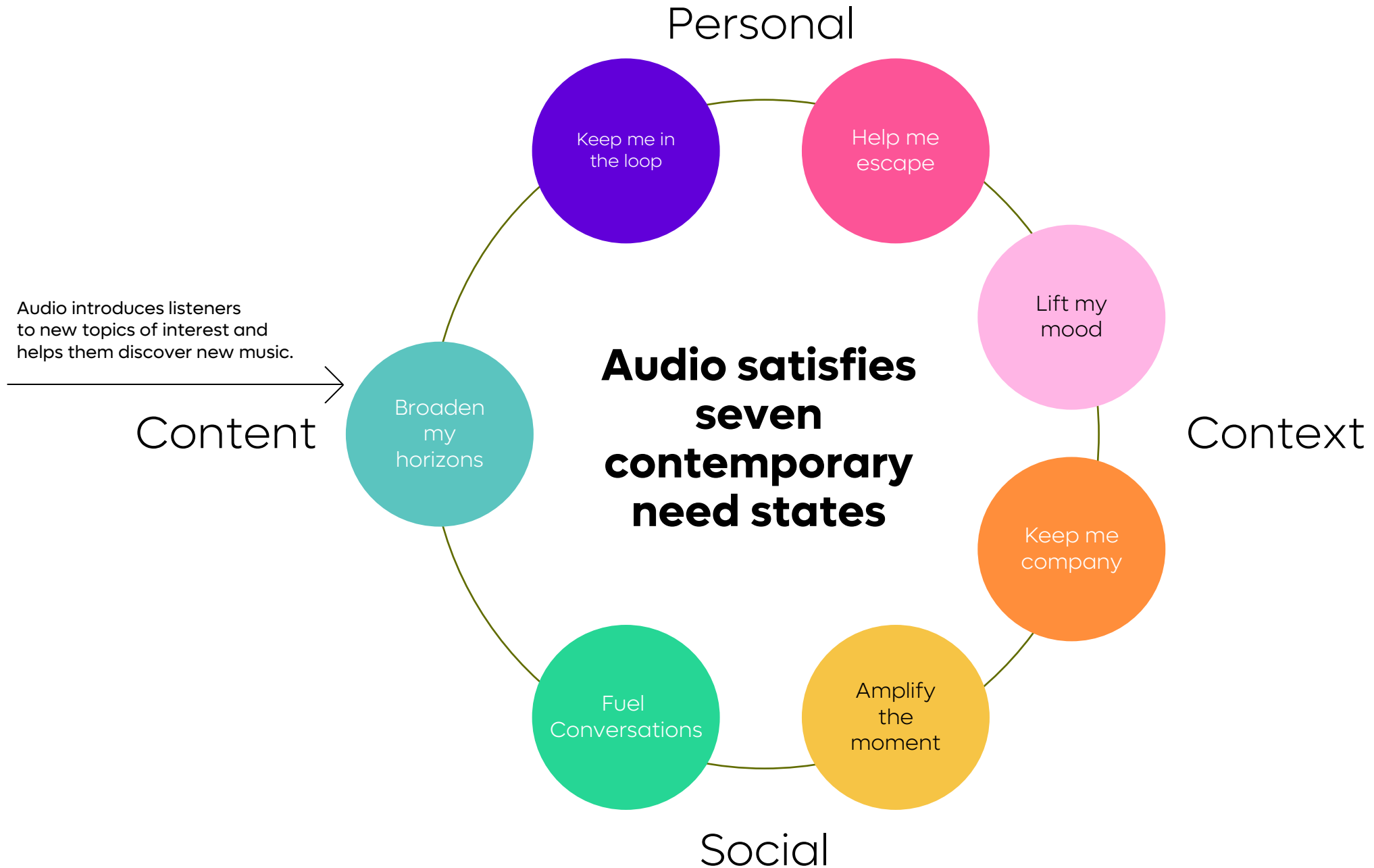
Base: 64,945 commercial listening minutes



Fuel conversations

5% of total listening time

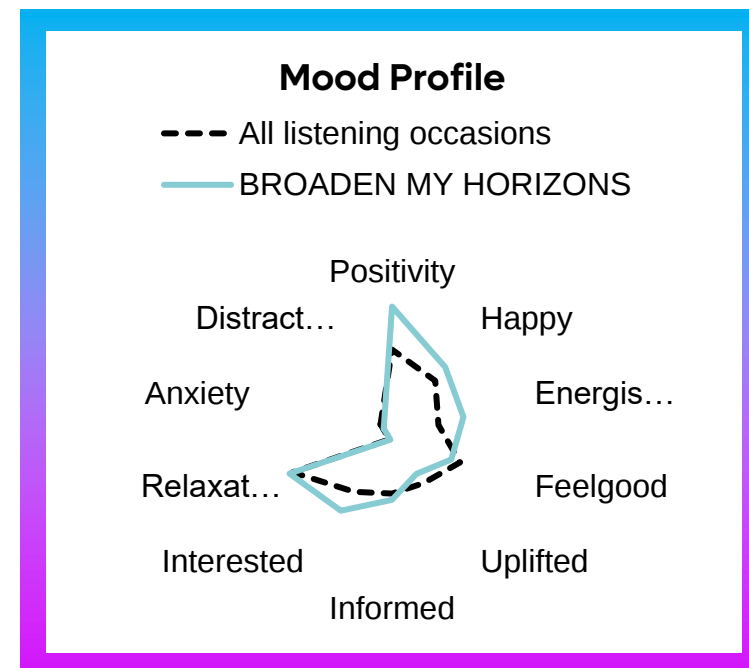




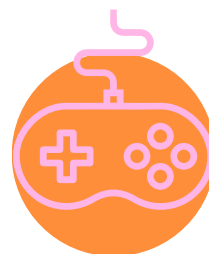
Broaden my horizons

"I believe that I will listen to more podcasts in the near future as this is how I broaden my horizons"

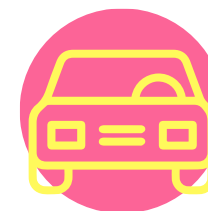
- F, Limerick



Mainly Alone
or with Colleagues Or Children

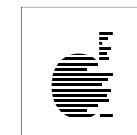


Relaxing/Nothing in Particular,
Childcare, Cooking, Eating/Drinking



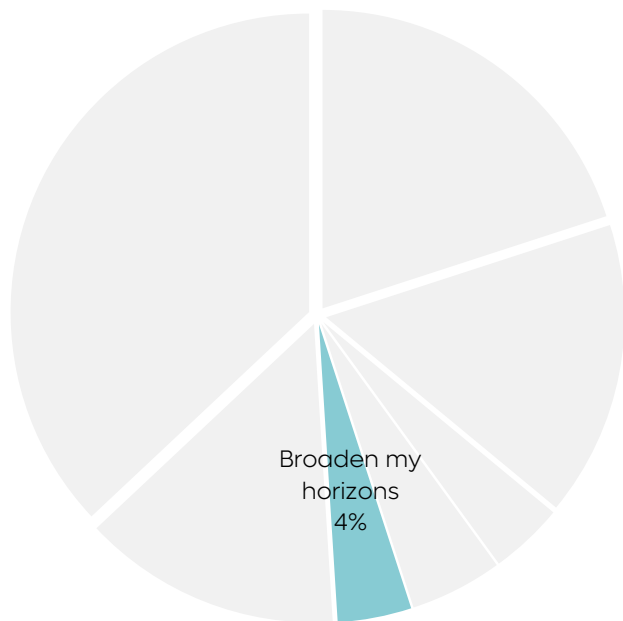
63% At home

28% in-car

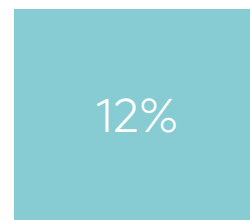


Broaden my horizons

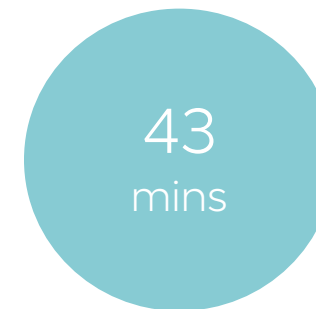
4% of total listening time



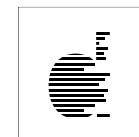
Share of total listening time



weekly reach

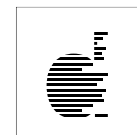
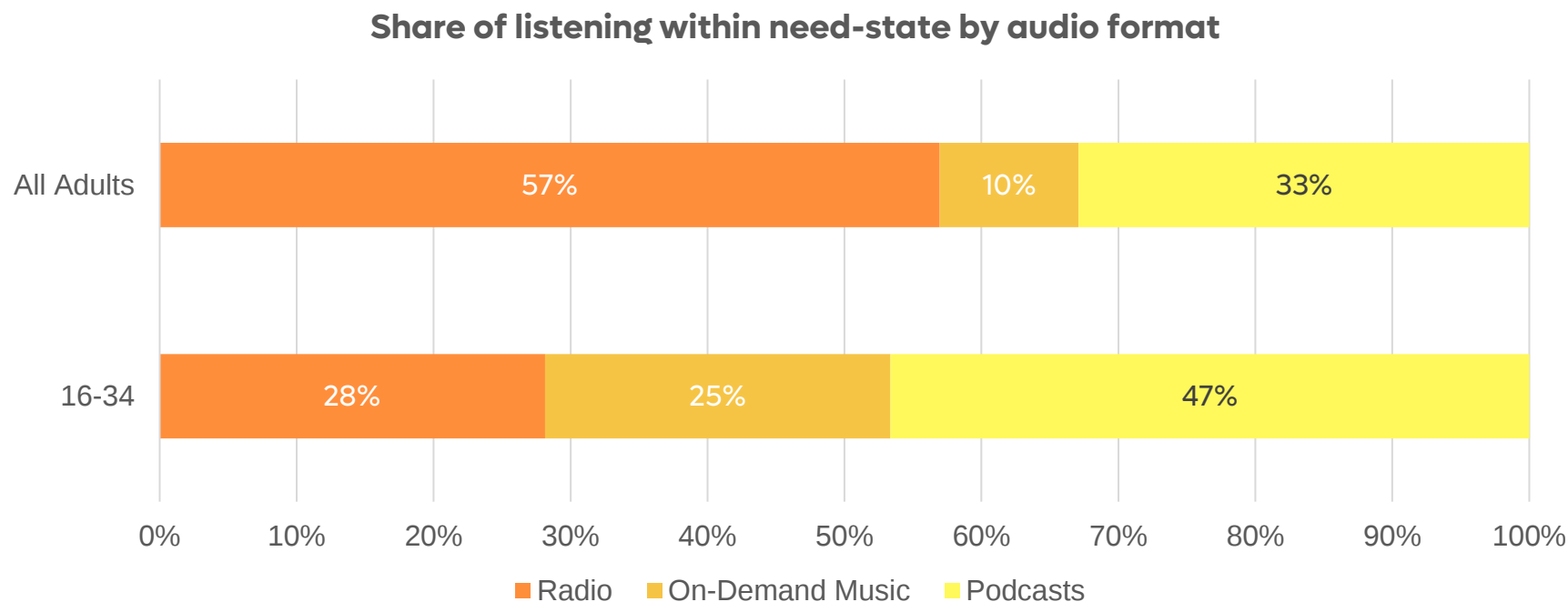


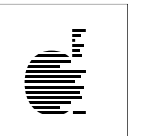
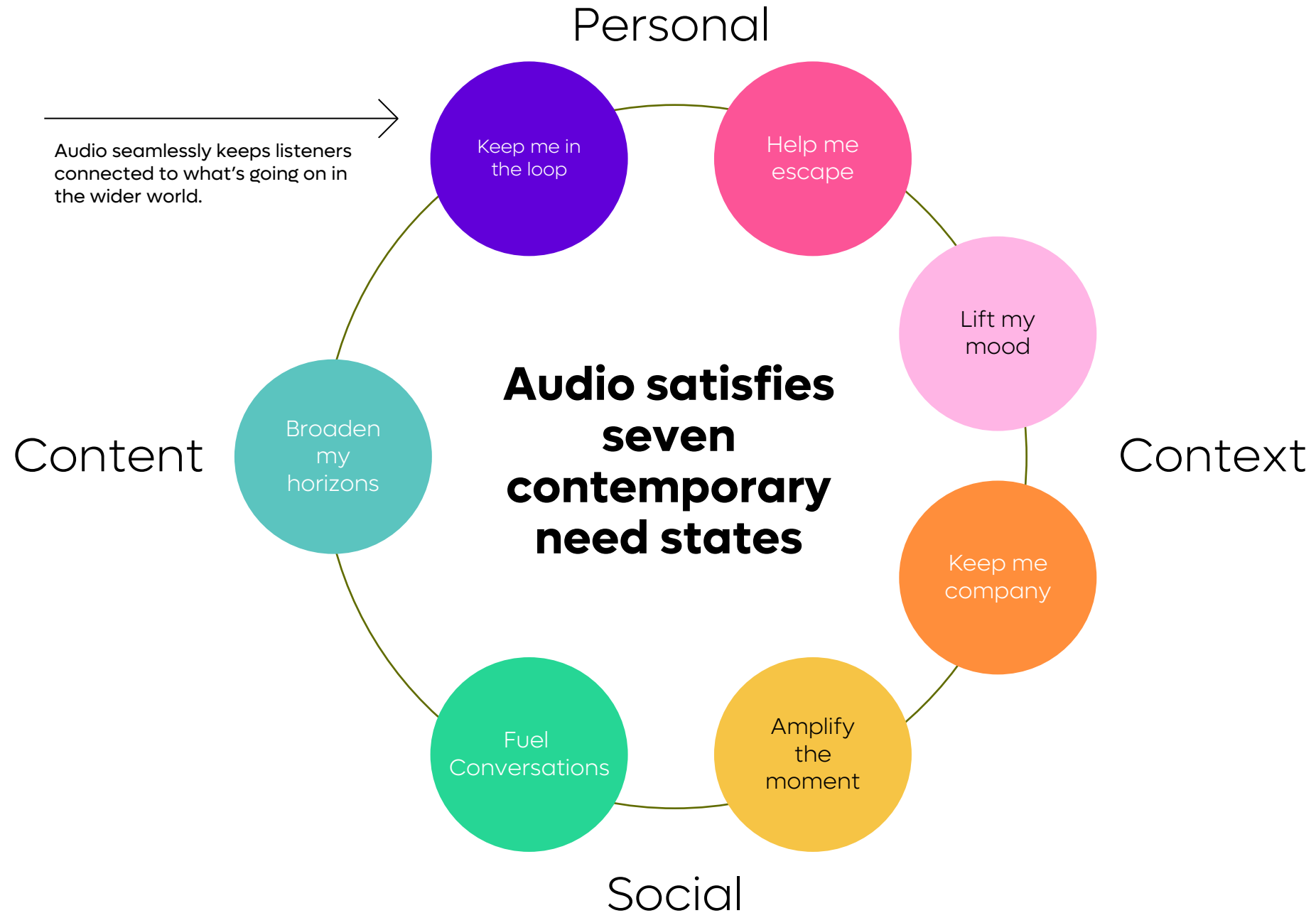
Av. length of listening occasion



Broaden my horizons

4% of total listening time

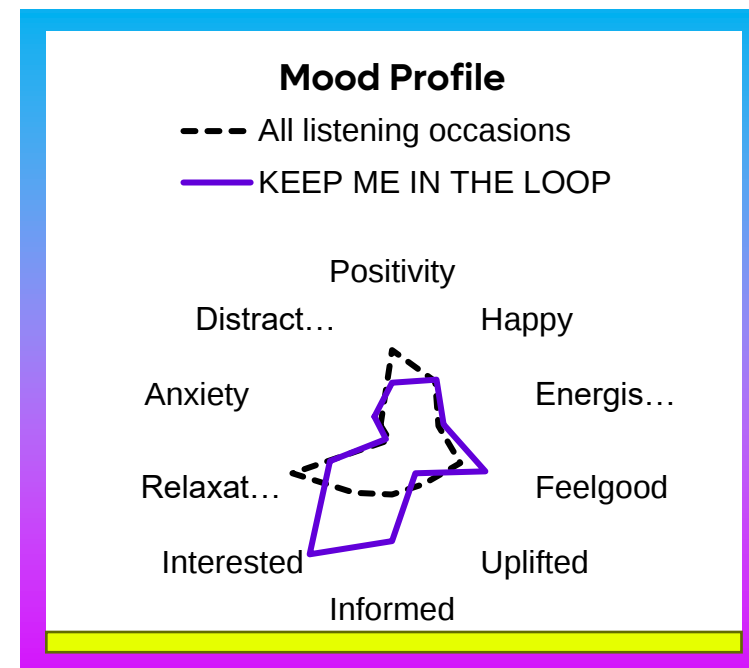




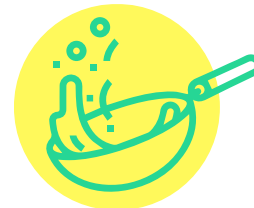
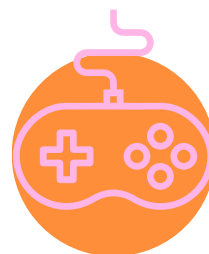
Keep me in the loop

I think radio has remained constant in my life and always keep me up to date with current affairs and news."

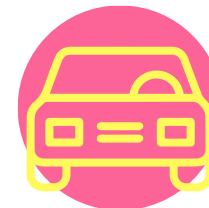
- F, Dublin



Mainly Alone
or with Colleagues Or Children

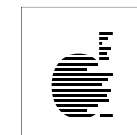


Working/Studying, Gaming, Cooking, Eating/Drinking



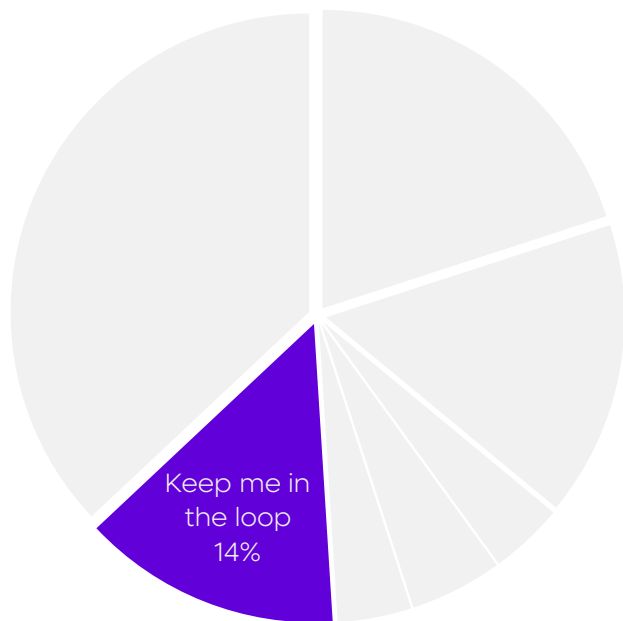
55% At home

23% in-car



Keep me in the loop

14% of total listening time



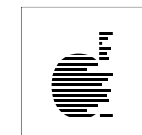
Share of total listening time



weekly reach

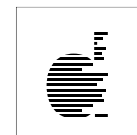
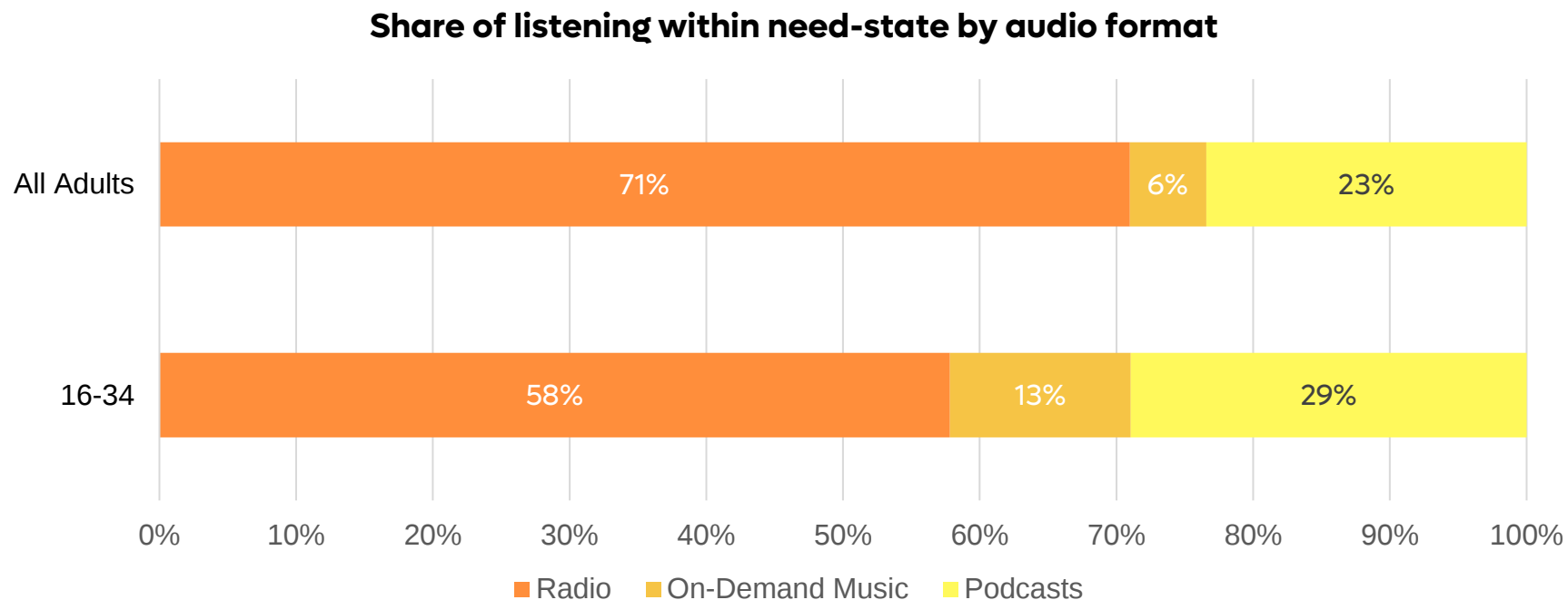


Av. length of listening occasion



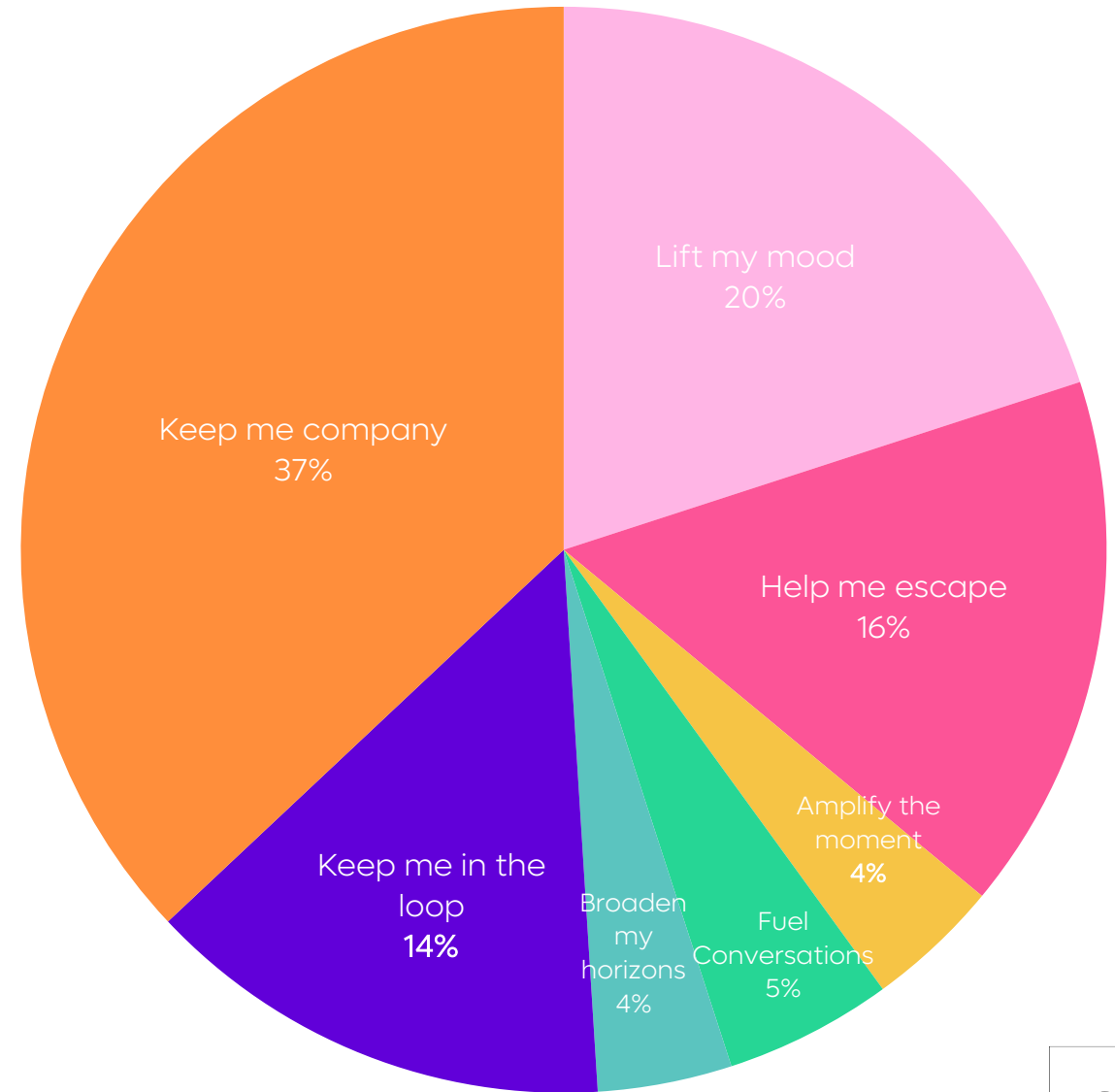
Keep me in the loop

14% of total listening time



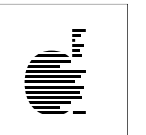
Total commercial audio:

share of weekly listening
time by need-state Ireland



Source: Radiocentre Ireland/Differentology 2023

Share of total commercial listening (duration)
Base: 64,945 commercial listening minutes





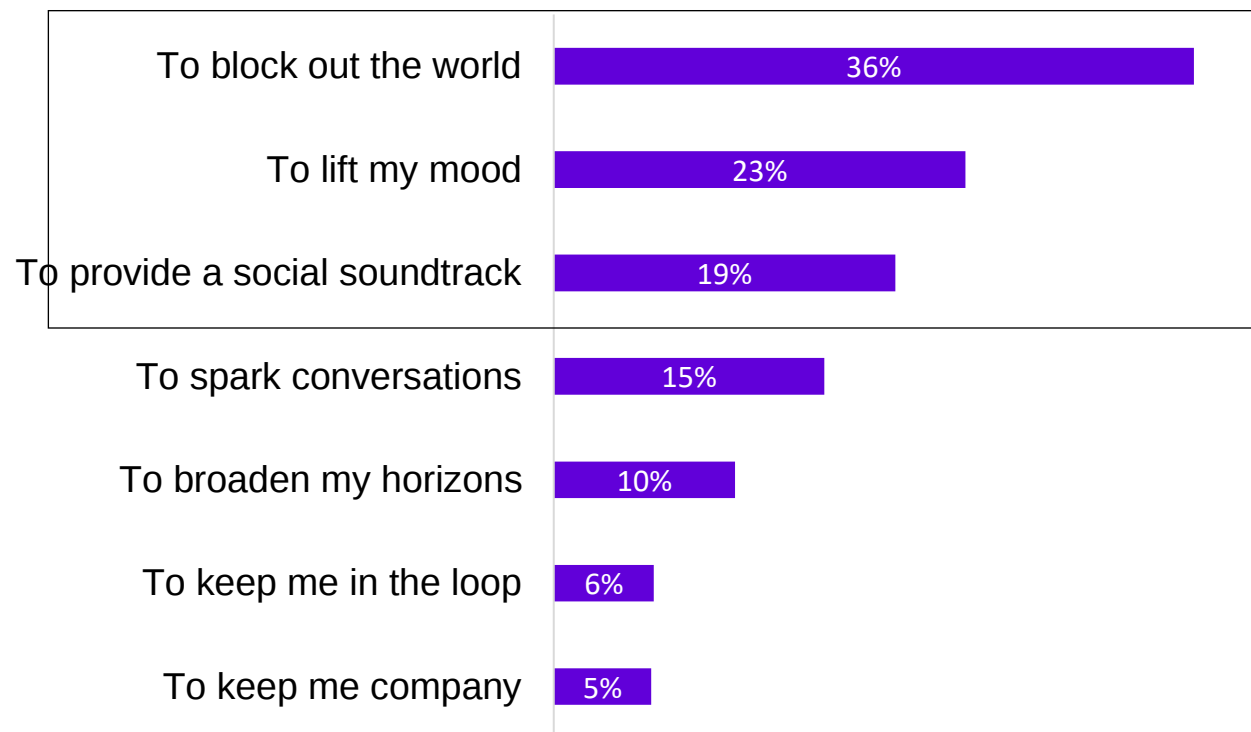
The Key **Characteristics** of the different audio formats

On-demand music services

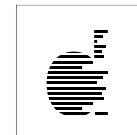
Share of listening within
each need state



Ranked largest to smallest



Source: Radiocentre Ireland/Differentology 2023
Share of total commercial listening (duration)
Base: 64,945 commercial listening minutes

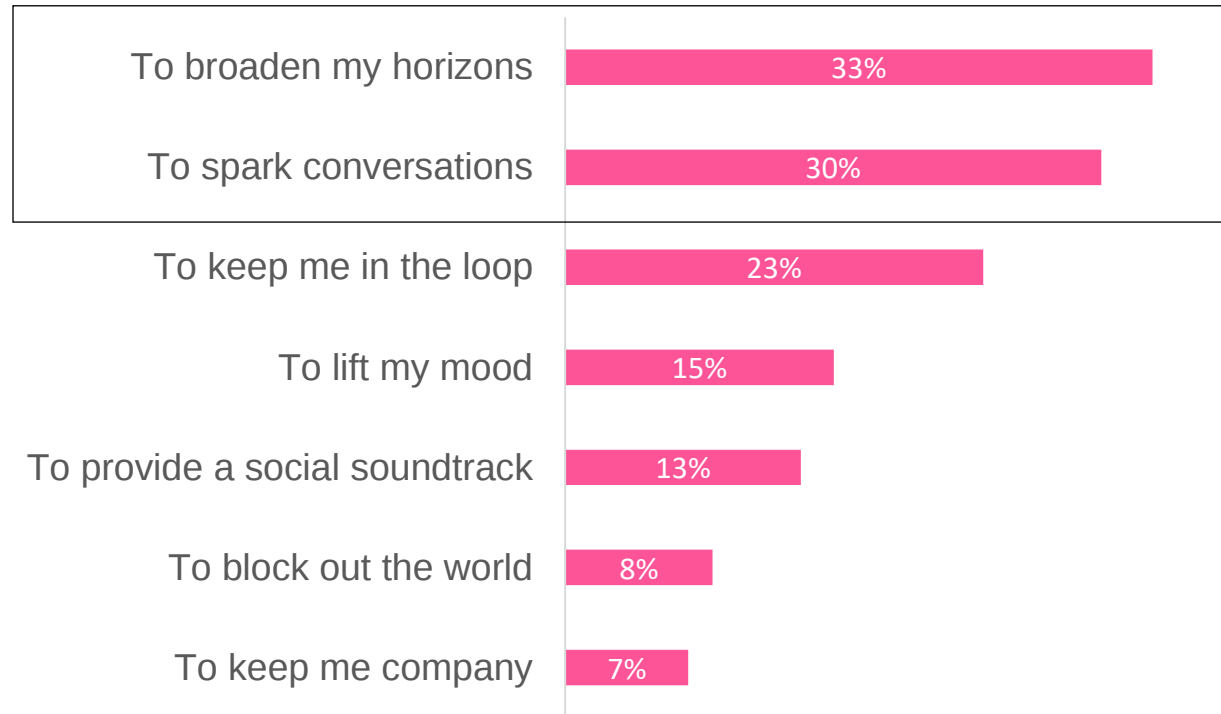


Podcasts

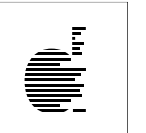
Share of listening within
each need state



Ranked largest to smallest

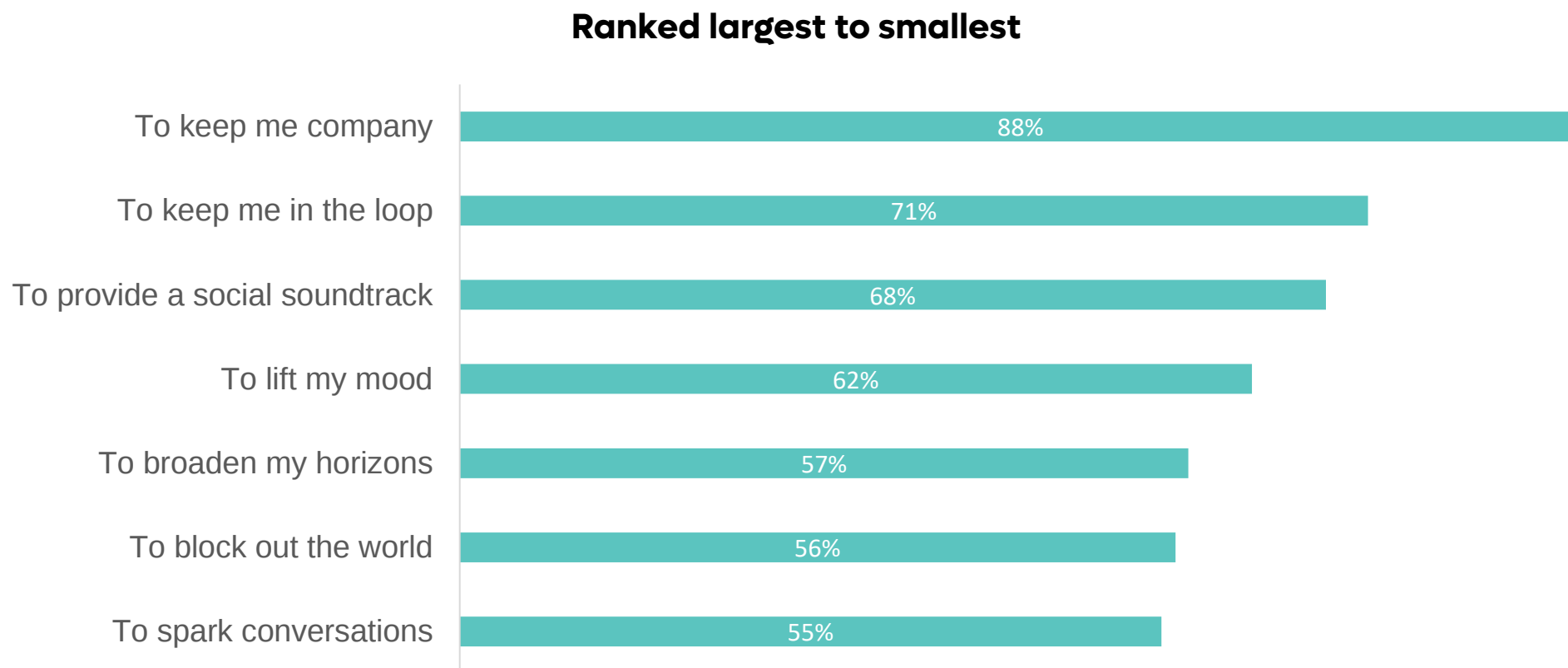


Source: Radiocentre Ireland/Differentology 2023
Share of total commercial listening (duration)
Base: 64,945 commercial listening minutes



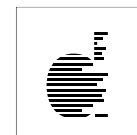
Live Radio

Share of listening within
each need state



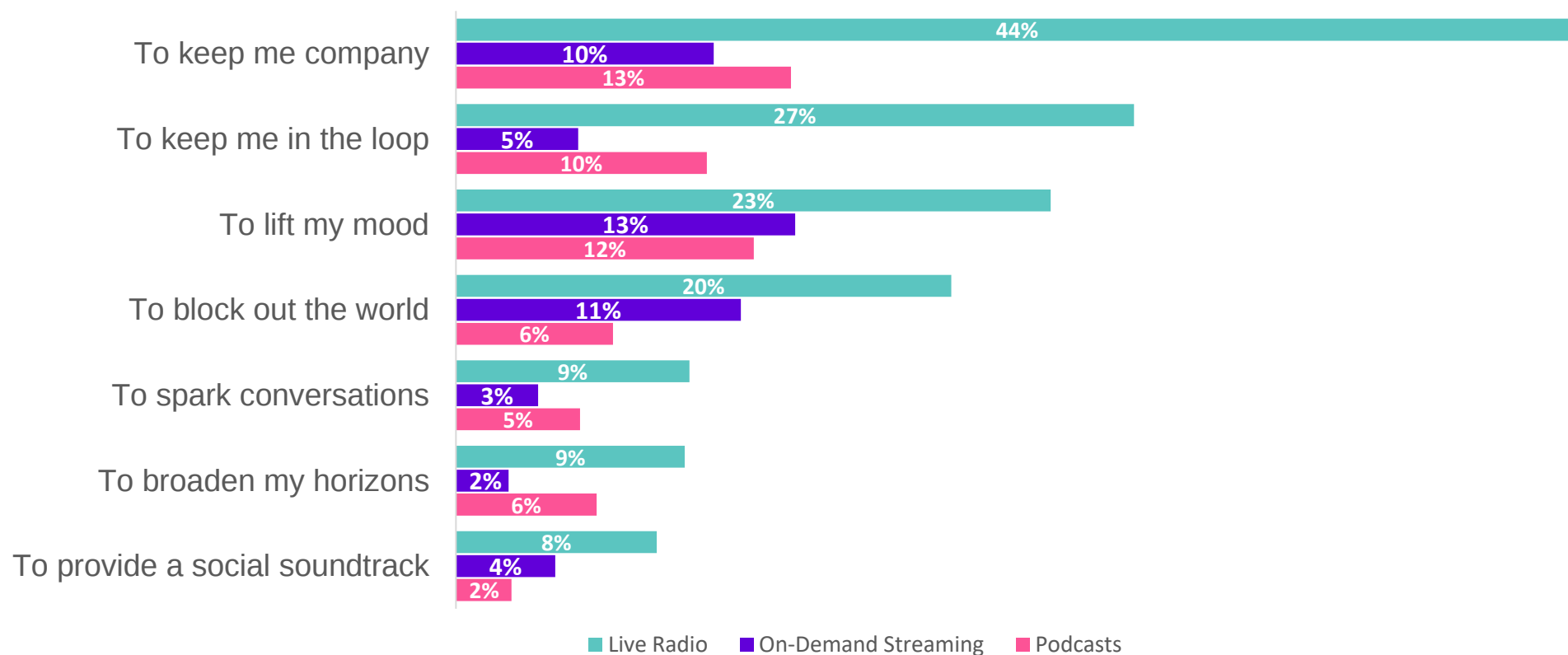
Source: Radiocentre Ireland/Differentology 2023

Share of total commercial listening (duration)
Base: 64,945 commercial listening minutes



Reach by Audio Format Based on Commercial Listeners

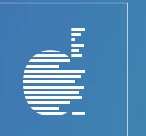
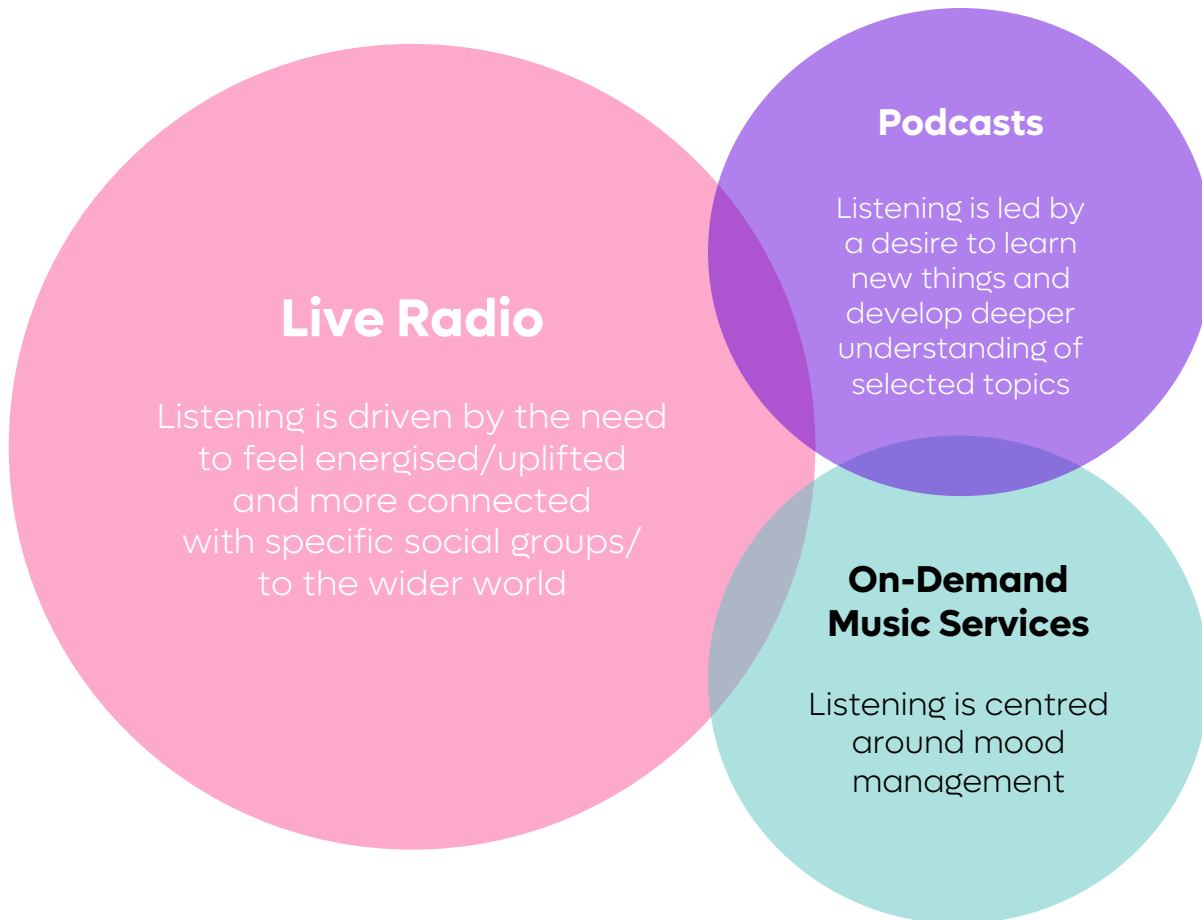
Weekly Reach by Media by need state



Source: Radiocentre Ireland/Differentology 2023

Weekly Reach by Audio Format
Base: 397 Commercial Audio Listeners

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



Summary



Summary

1

Role of Need States

Audio serves many different needs in people's lives, both social and individual, informative and atmospheric

2

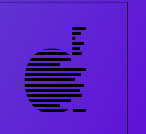
Need States & Advertising

Understanding need states allows planners to align brand and ad objectives with a need state in order to amplify impact

3

Role of Audio Format

Radio is a dominant force, but the platforms are complimentary with both On-demand and Podcasts playing a more dominant role in certain need states



Thank you

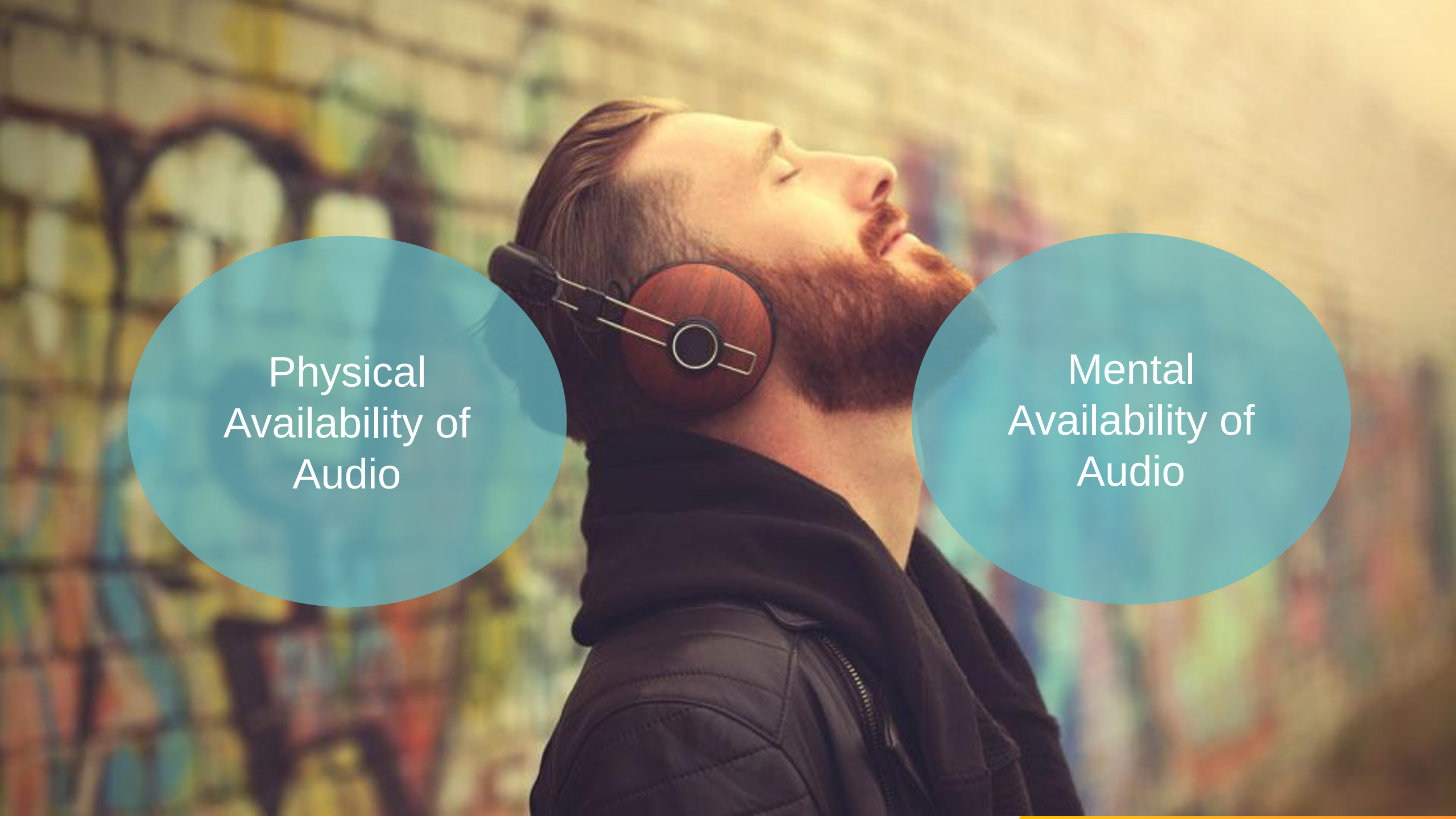
d.fferentology



RADIOCENTRE IRELAND



1. Audio audiences continue to grow

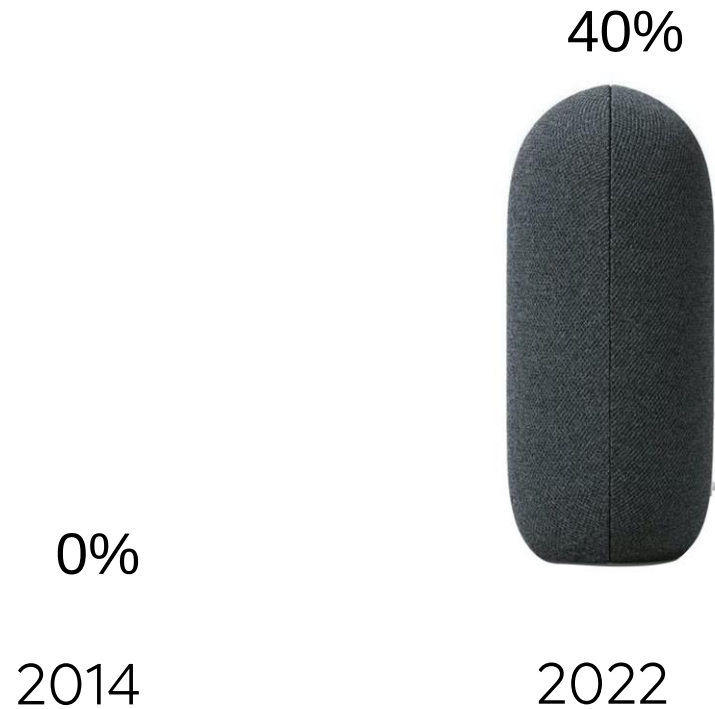


Physical
Availability of
Audio

Mental
Availability of
Audio

Increased penetration of connected devices makes audio easier to access than ever before

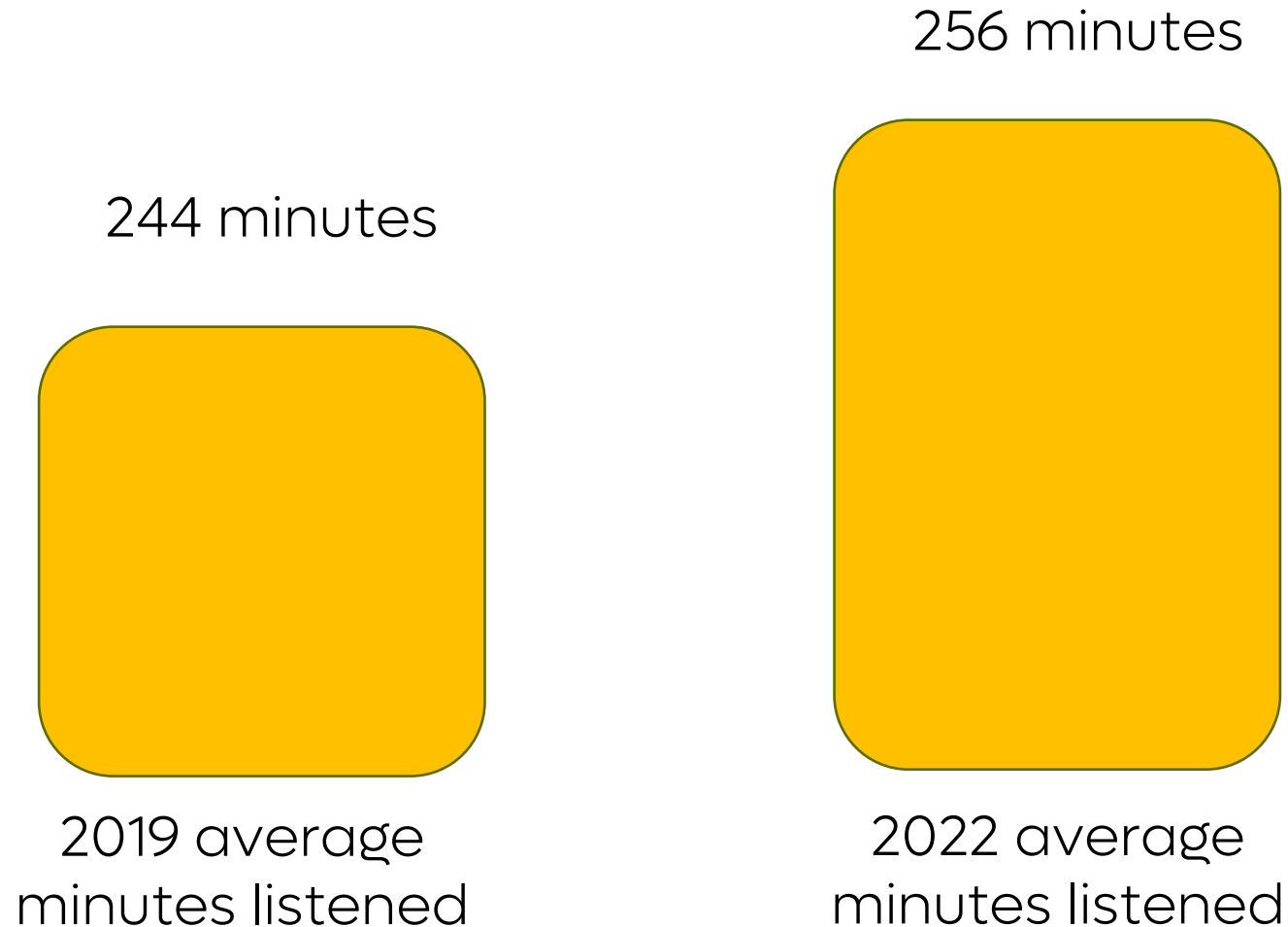
Smart Speaker Penetration

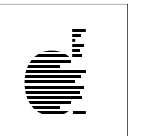
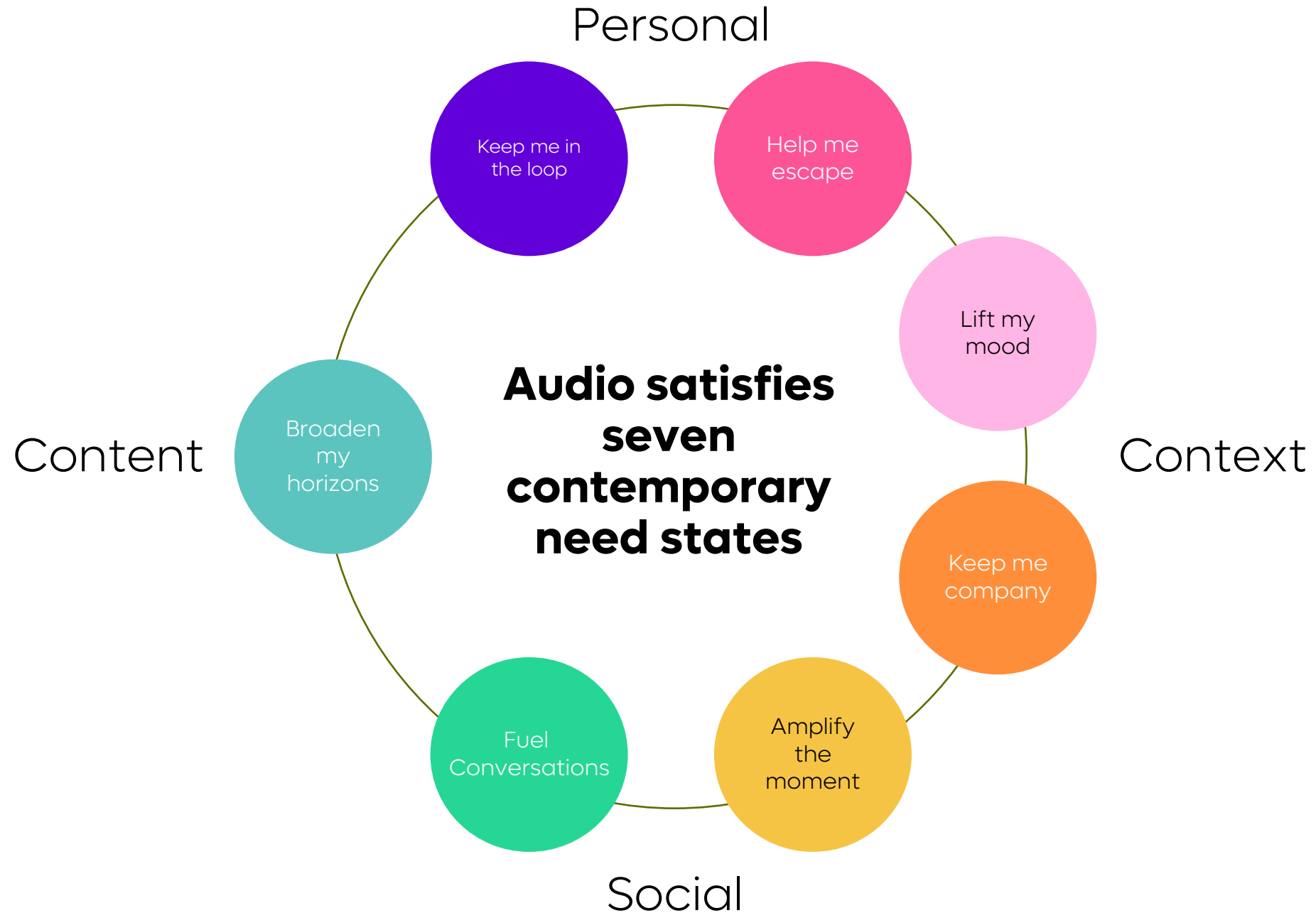


Smartphone Penetration



Increased penetration of connected devices makes audio easier to access than ever before





HOW PROCTER & GAMBLE IS RE-INVESTING IN RADIO TO FIND TV AUDIENCES

Radio is helping the CPG giant find audiences linear TV no longer reaches at fraction of CTV cost

By [Jack Neff](#). Published on March 15, 2023.



AdAge

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How to produce video creative cost-effectively

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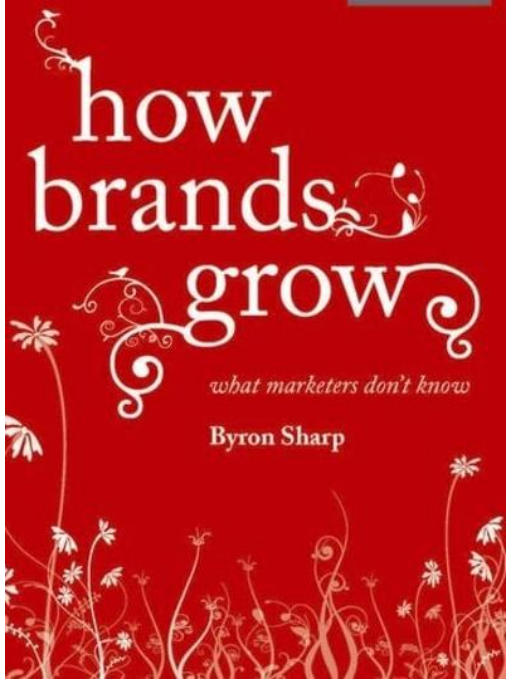


Threads' first ad deal comes from Hulu and creator Adam Rose

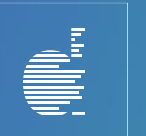
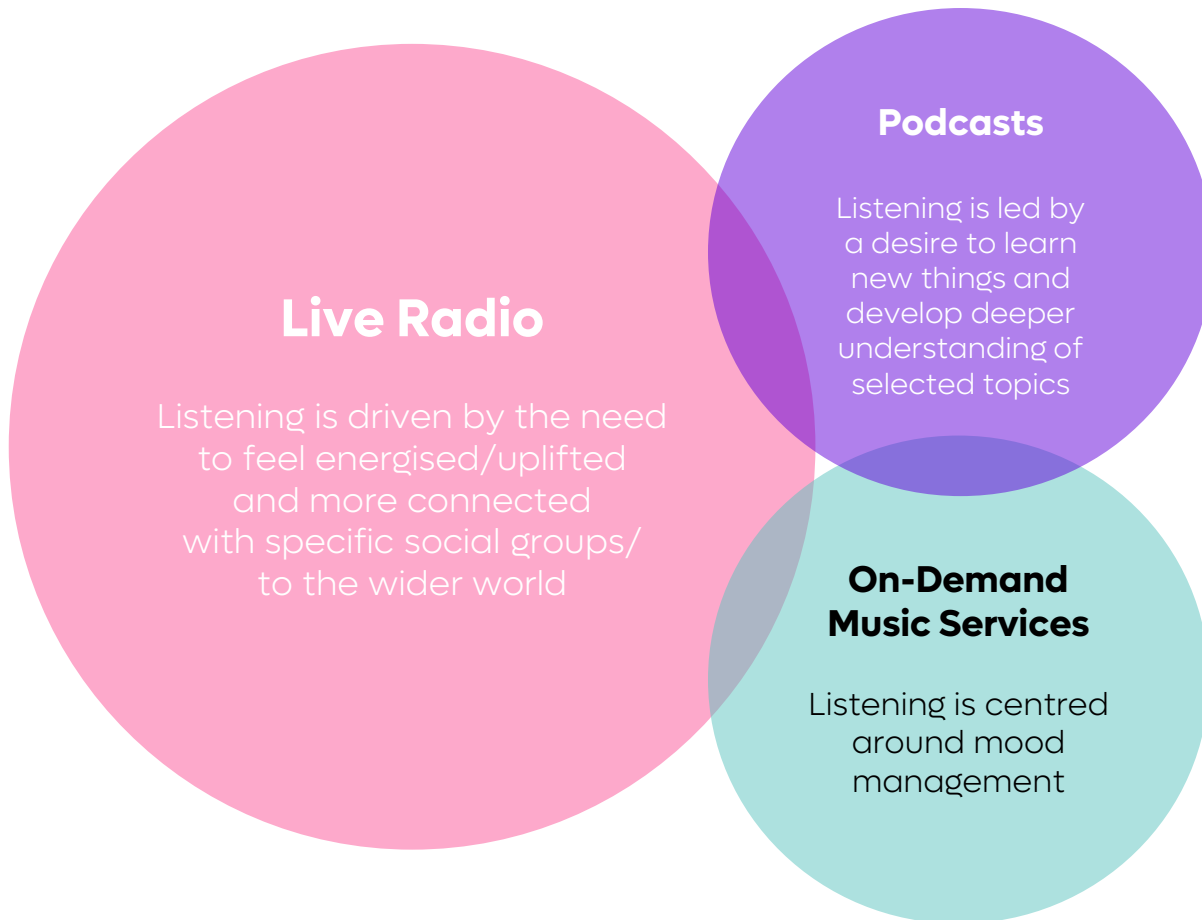


2. Reach is a crucial driver of effectiveness

Weekly reach drives audio effectiveness



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



3. Focus on audio creative



The Long and the Short of It



Balancing Short and Long-Term Marketing Strategies
Les Binet, Head of Effectiveness, adam&eve DDB
Peter Field, Marketing Consultant



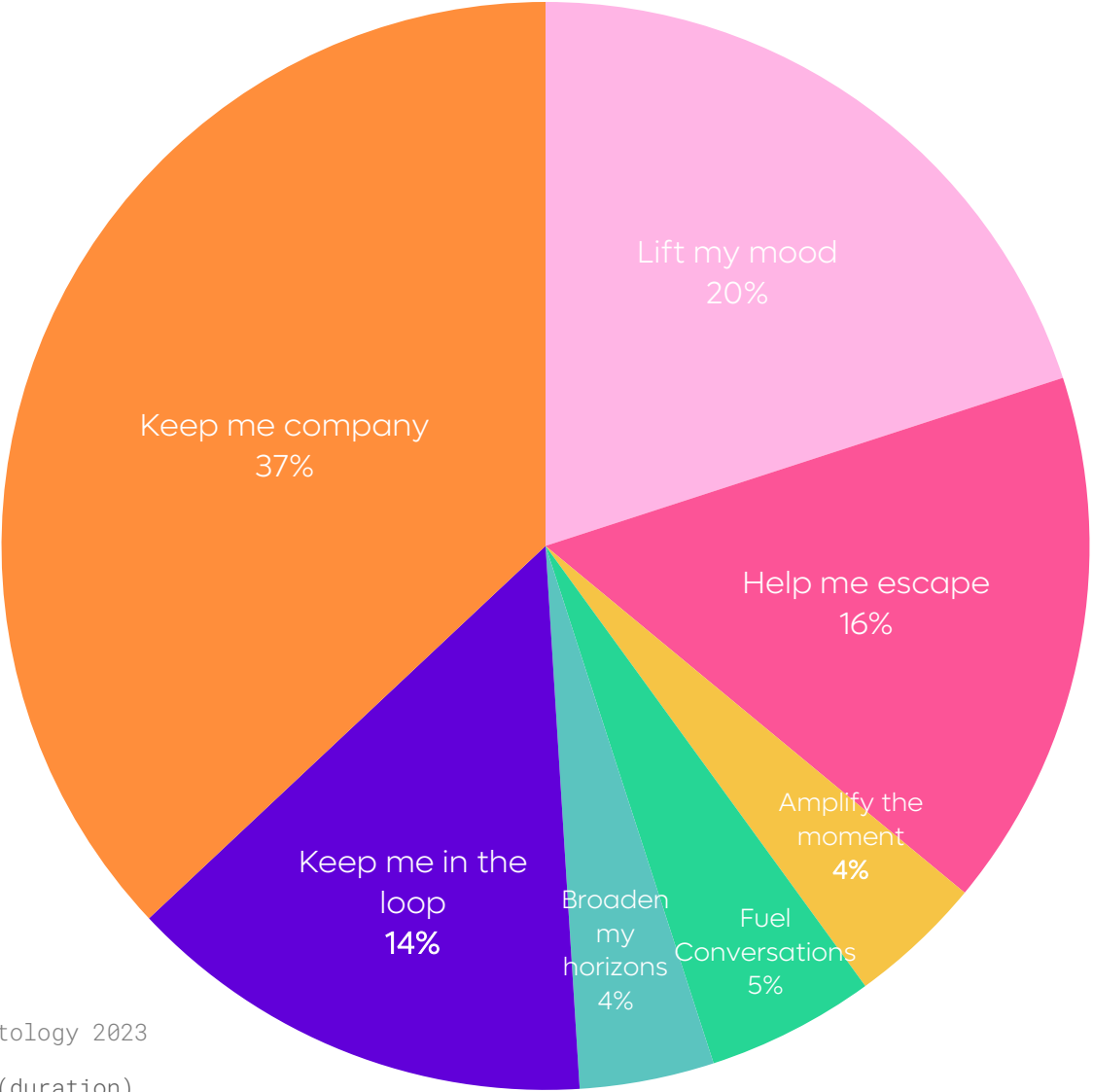
Listen Up!

Emotion's Defining Role in
Radio Advertising Effectiveness



System1

Audio is uniquely placed to put listeners at the centre of comms



Source: Radiocentre Ireland/Differentology 2023

Share of total commercial listening (duration)
Base: 64,945 commercial listening minutes



Leverage the power of audio

- 🎧 Place the listener at the centre of comms
- 🎧 Don't place a condition on the length of an ad
- 🎧 Invest resource (time and money) in crafting your message
 - Use a director
 - Use actors, not voice over artists
 - Pre-production meetings

Summary

-  Audiences continue to grow
-  Weekly reach is key
-  Focus on audio creative



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