The Irish Audio Report 2025

RADIOCENTRE IRELAND

Ipsos B&A

Contents

JNLR—Irish Audio Report 2025

Executive Summary

Against a backdrop of significant competition for audience attention, audio content continues to reach the vast majority of adults in Ireland — with 96% listening weekly.

Irish audiences are highly digitally connected. Smartphone ownership is almost universal (91%), while ownership of smart speakers (44%) and Bluetooth wireless headphones (56%) enables convenient access to audio content. Ownership of these devices is notably higher among younger demographics.

Subscription levels to premium services have rebounded this year to match those seen in 2023, with 38% of adults now paying for one or more services — including music streaming, podcasts, or YouTube Premium. While younger people remain more likely to pay for audio content, subscription levels among the youngest group (15–24s) have declined year-on-year.

In 2025, engagement with audio content on a weekly basis is almost universal. Radio remains the dominant format, reaching 89% of the adult population weekly, compared to 56% who listen to online on-demand audio. Although radio leads across all age groups, on-demand listening is above average among younger cohorts.

There is, however, a significant degree of cross-over listening between digital and radio audiences. Given radio's unrivalled reach across all formats, maintaining radio within the mix continues to deliver maximum overall audience reach.

Audiences tend to listen to on-demand content for shorter periods of time, whereas radio listeners stay tuned in for longer. This naturally impacts the overall share of listening time.

On an average day, live radio accounts for 73.8% of total listening time — a modest decline of 1.7 percentage points year-on-year. Music streaming's share (13.5%) has grown by a similar margin, while podcast share remains broadly stable at 3.5%.

Home remains the primary environment for audio listening and is the most common setting across all age groups. However, in-car listening has increased again, now reaching 49% daily, and peaks among young to mid-life audiences (25–44 and 45–64). Live radio is the dominant format in the car. Listening outside the home — at work or college (12%) and while walking or running (10%) — remains broadly consistent, with higher levels observed among younger people.

While traditional devices continue to anchor listening habits, almost one-third of the population now access audio content via their smartphone. Music streaming is the key driver of this behaviour, with one in five people streaming daily on their phone.

Smart speaker listening shows marginal year-on-year growth, reflecting a steady — if gradual — pace of adoption since 2021.

01

Ownership of Technology


YUM!

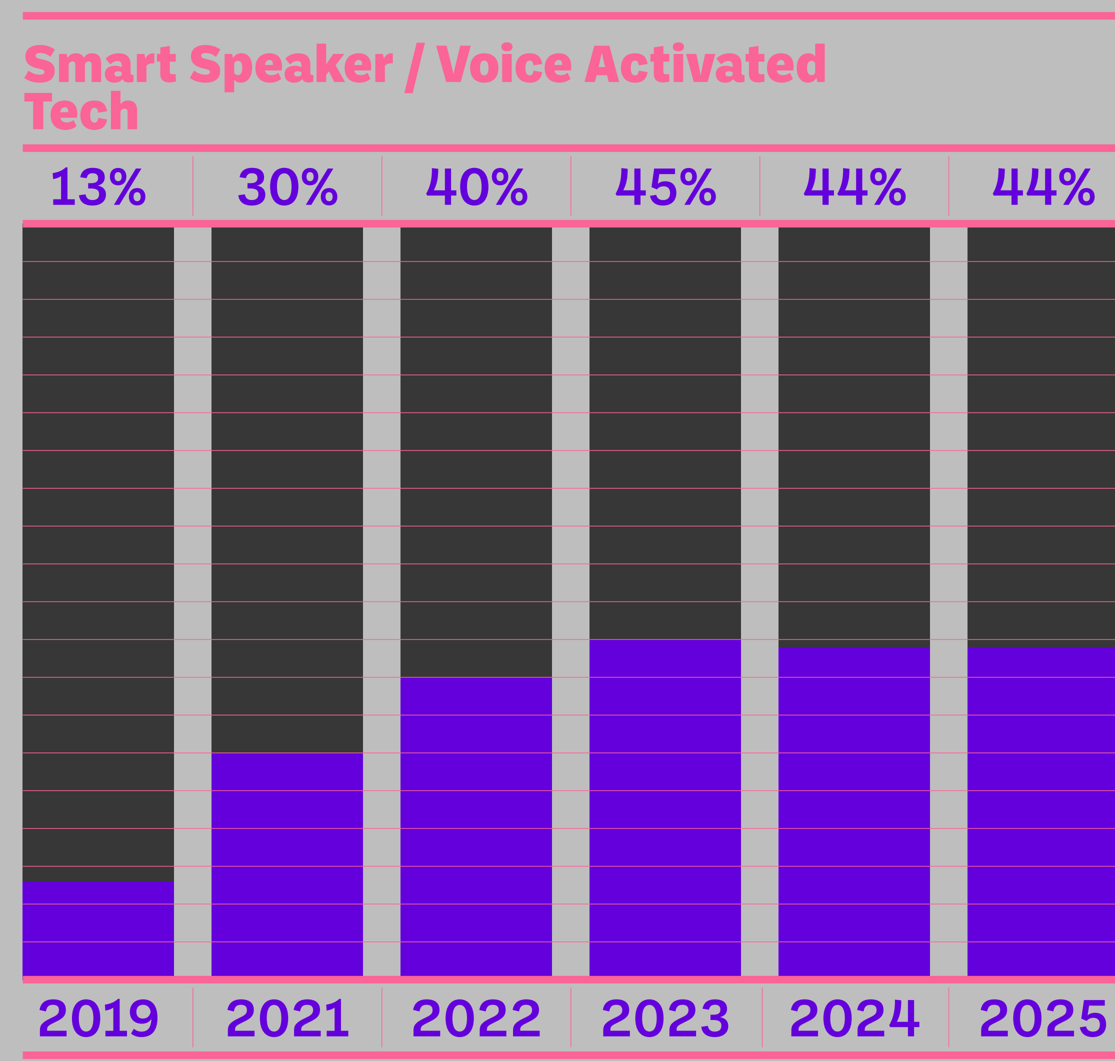
Technology Enables Access to Audio Content

Irish people remain highly digitally connected, with widespread ownership of devices that enable access to media both at home and on the move. Smartphone ownership is now almost universal, with 91% of the population owning one. As expected, ownership is highest among younger adults, with almost all 15–24-year-olds using a smartphone (98%), while ownership is lowest among those aged 65 and over (72%).

On-the-go connectivity continues to be strengthened by the popularity of Bluetooth-enabled wireless headphones. Ownership is again highest among younger adults, with 74% of those aged 15–44 owning wireless headphones, compared with marginal growth among the older 45+ age group (38%).

Smart speakers, such as Alexa and Google Home, have firmly established their place in the home environment. When first measured in 2018, only one in ten households owned such a device. Today, ownership levels have reached 44% in 2025. While this represents significant growth over time, the pace of adoption has stabilised in recent years.

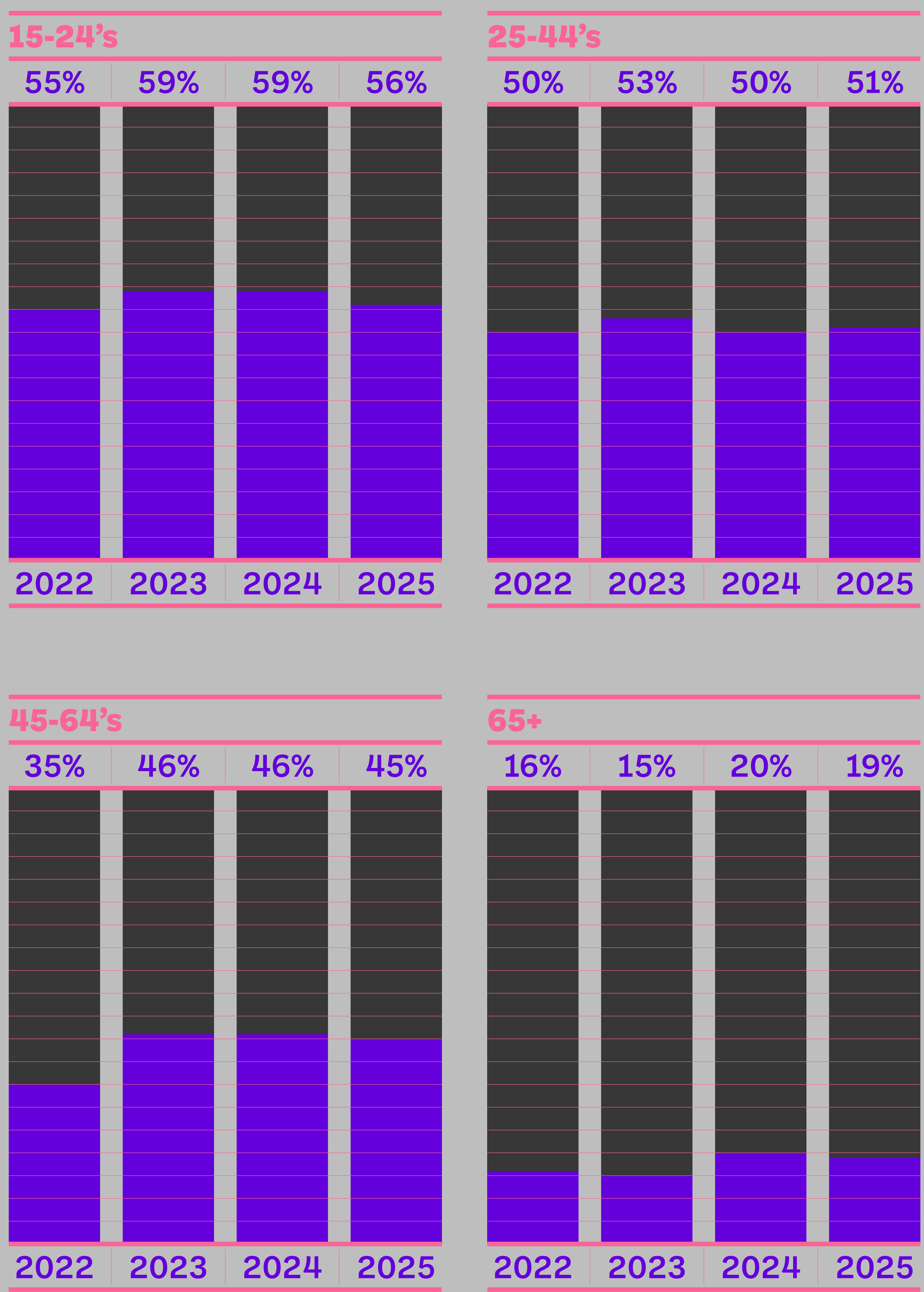
Ownership of Smart Speaker



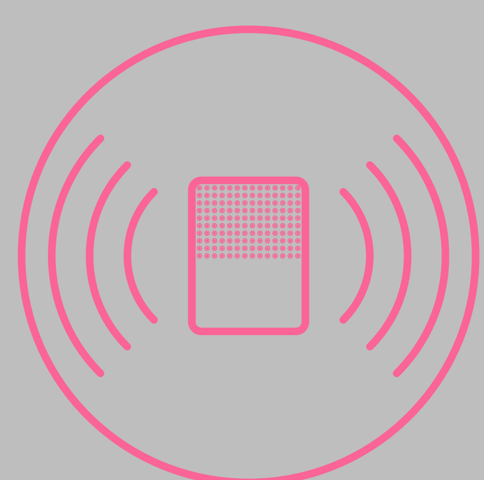
Source: JNLR 2025-2 Audio Module (Apr'25 to Jun'25 - 3 month Data).

As with other technology devices, ownership is highest among younger people and the broad trend is reasonably stable across these younger groups. However, while adoption is lower among those aged 45+, recent years have seen more notable growth within these older cohorts, as illustrated in the chart on page 14.

Ownership of Smart Speakers by Age/Trend



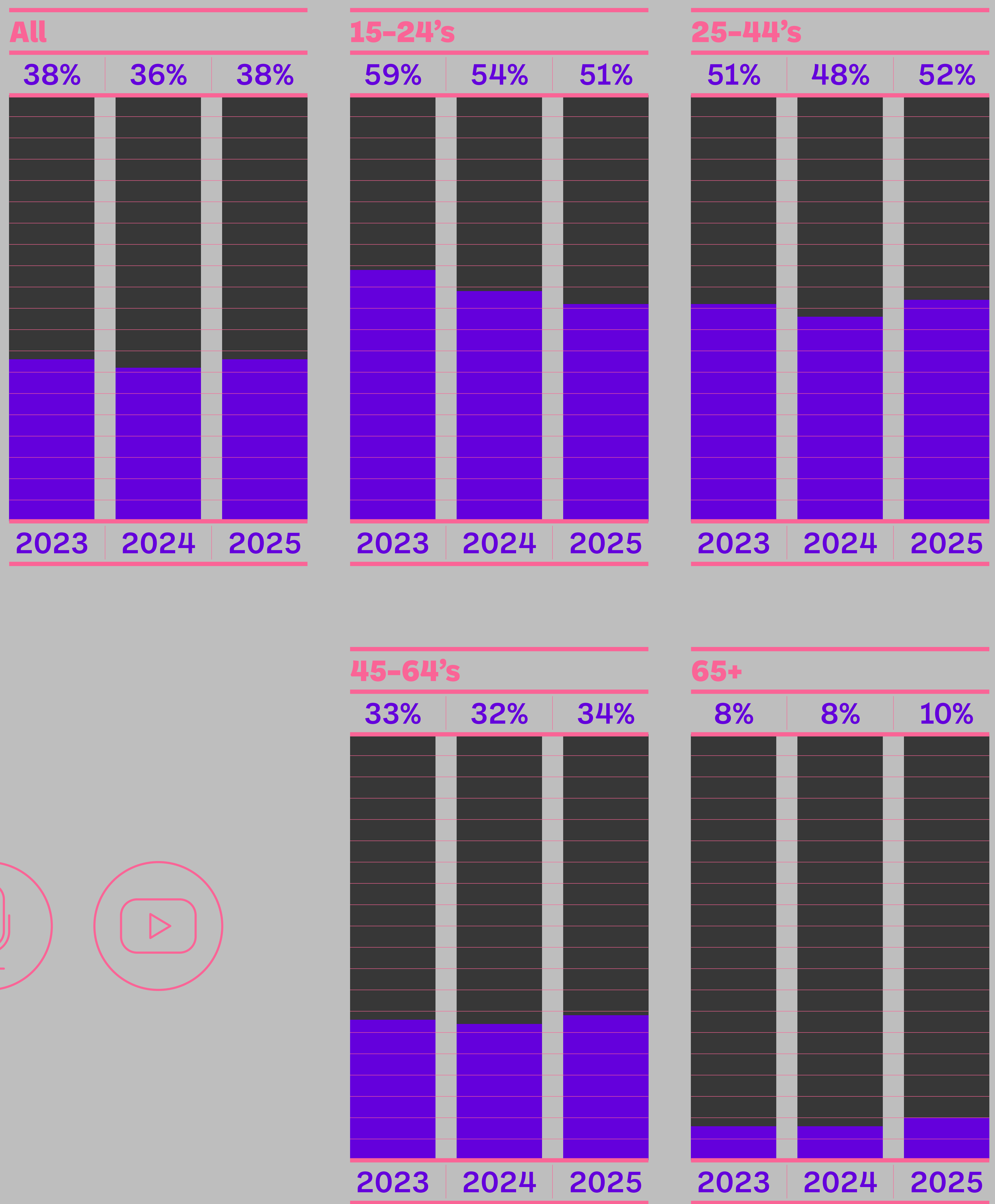
Source: JNLR 2025-2 Audio Module
(Apr'25 to Jun'25 - 3 month Data).



Subscriptions to Online Audio Platforms

Almost four in ten people (38%) report having a paid subscription to at least one premium service — such as an audio streaming platform, podcast service, or YouTube Premium. This represents an increase of two percentage points year-on-year, returning to 2023 levels. Subscription growth appears to be driven primarily by music streaming activity.

Any Paid Subscriptions by Age/Trend



Source: JNLR 2025-2 Audio Module
(Apr'25 to Jun'25 - 3 month Data).

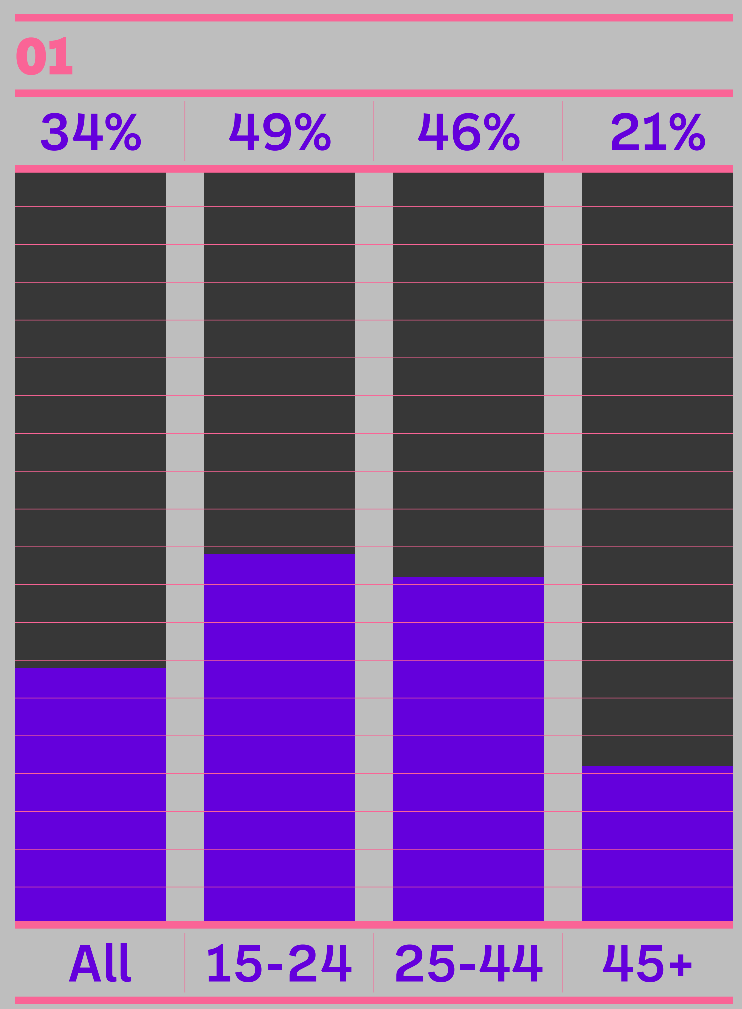
Audio Streaming Remains the Dominant Choice

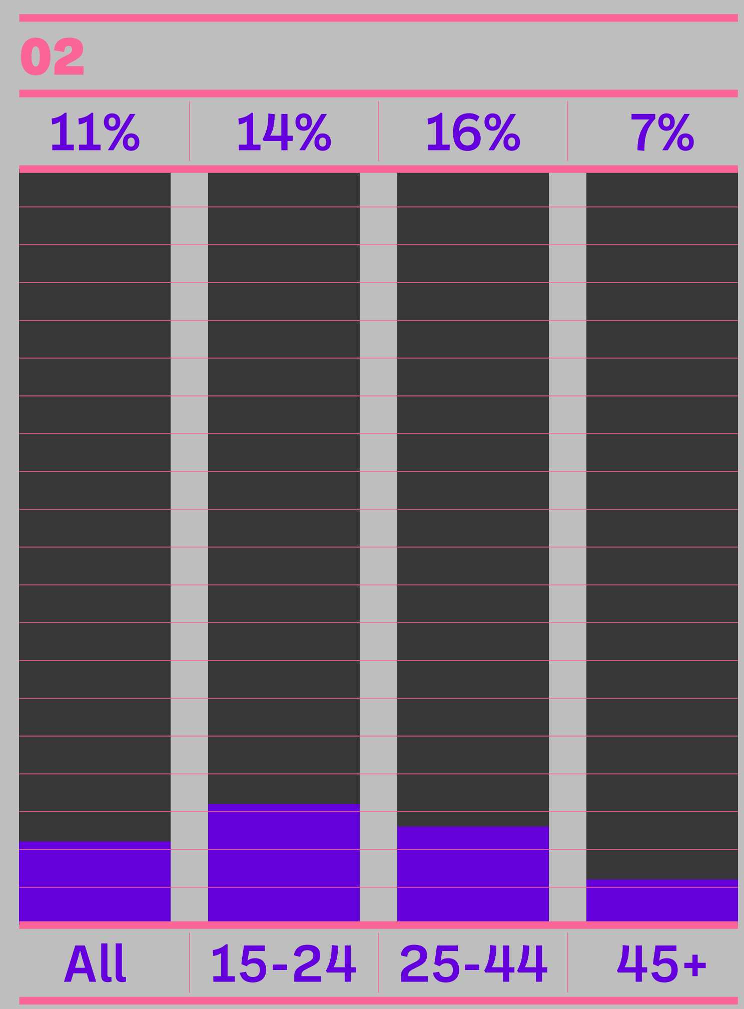
In terms of subscription services, audio streaming remains the dominant format of choice. One in three Irish adults (34%) currently subscribe to a platform such as Spotify Premium — an increase of three percentage points since 2024, returning to 2023 benchmark levels. Younger adults continue to drive uptake, with nearly half of 15–24s (49%) and 46% of 25–44s paying for a subscription. By contrast, only 21% of those aged 45 and over subscribe, with the majority of these being under 65.

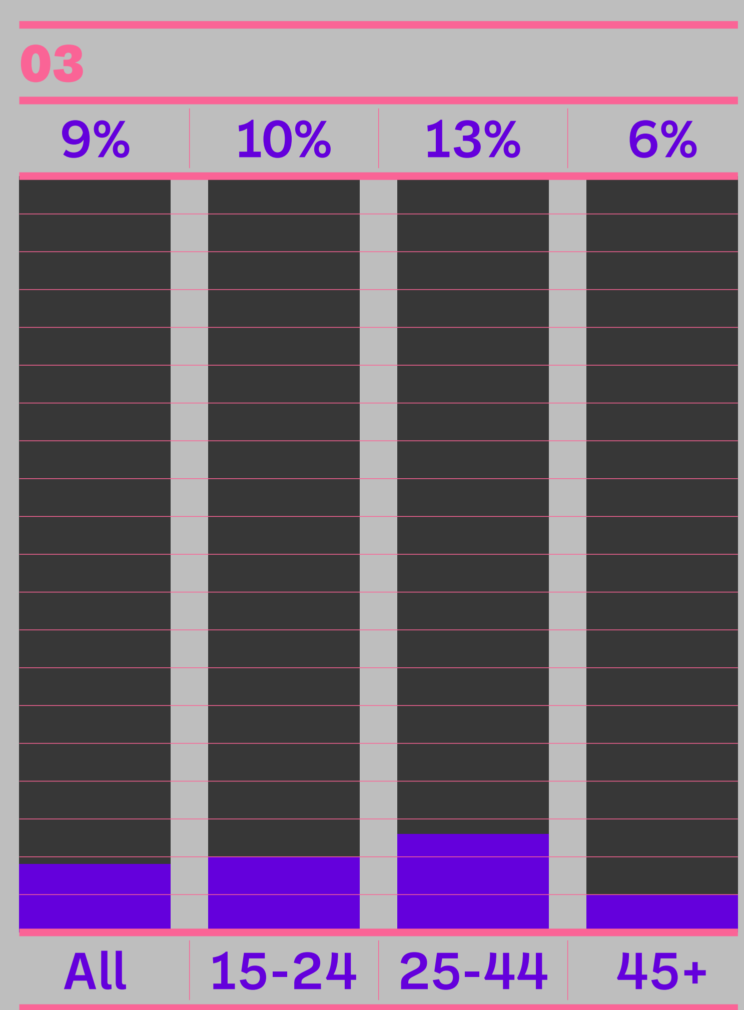
YouTube Premium attracts a smaller subscriber base, with 11% of adults paying for the service — up marginally (+1 percentage point) year-on-year, but still below the 2023 benchmark. Incidence is again higher among younger audiences, particularly those aged 25–44.

Almost one in ten people subscribe to a podcast service, unchanged since 2024. This category skews towards the 25–44 age group, with 13% reporting that they pay for podcast content.

Paid Subscriptions by Age







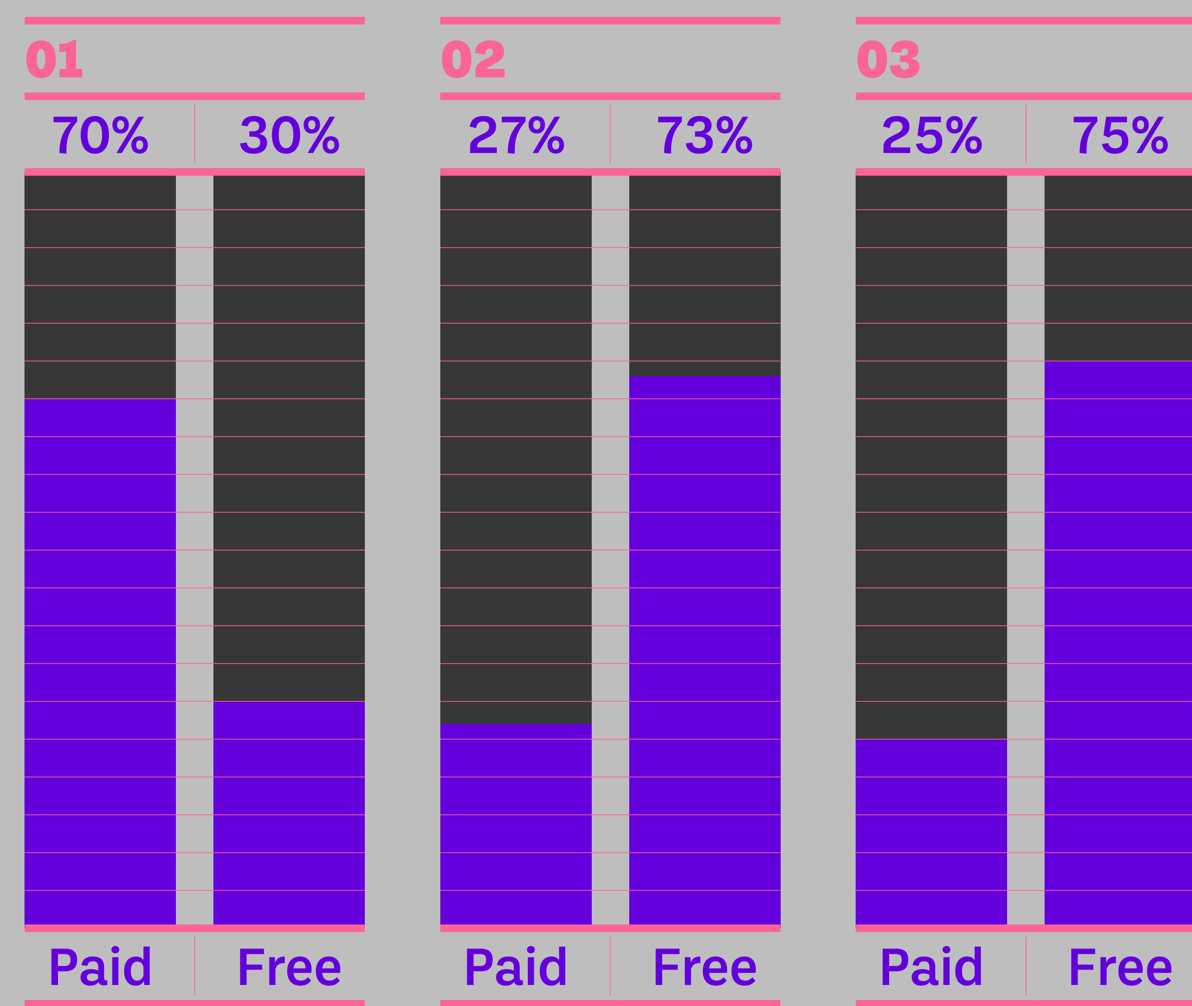
Source: JNLR 2025-2 Audio Module
(Apr'25 to Jun'25 - 3 month Data).

01	Paid Subscription Audio Streaming (such as Spotify Premium)
02	Paid Subscription YouTube Premium
03	Paid Subscription—any podcast

Looking at weekly audio consumption, seven in ten streaming listeners are paid subscribers. Assuming these listeners use their premium service to access content, this suggests that the majority of streaming activity takes place on paid platforms. In contrast, only 25% of weekly YouTube listeners pay for YouTube Premium, highlighting the platform's reliance on its free, ad-supported model.

For podcasts, weekly listening behaviour reflects a mix of free and paid content. Just over one-quarter (27%) of weekly podcast listeners hold a subscription to at least one podcast service — representing a minority who are willing to pay for ad-free content, while the majority continue to rely on ad-supported listening.

Profile Listeners Past Week



01	Audio Streaming Listeners
02	Podcast Listeners
03	YouTube Listeners

Source: JNLR 2025-2 Audio Module
(Apr'25 to Jun'25 - 3 month Data).

02

The Audio Market


LONDON
LIONS
LEGION
PURE
17:48 RADIO

The Audio Market
Weekly Listening Patterns

The Audio Module survey measures weekly and daily reach across all audio formats. Based on the 2025 results (i.e., listening in the past week), 96% of the population tune into some form of audio content each week, regardless of format. This equates to 4.24 million weekly listeners — a level of engagement that is almost universal.

As in previous years, live radio attracts more listeners than any other audio format, currently reaching 89% of the population. This compares with 56% for any online on-demand audio, representing a marginal year-on-year change: down one percentage point for live radio and up one for on-demand audio.

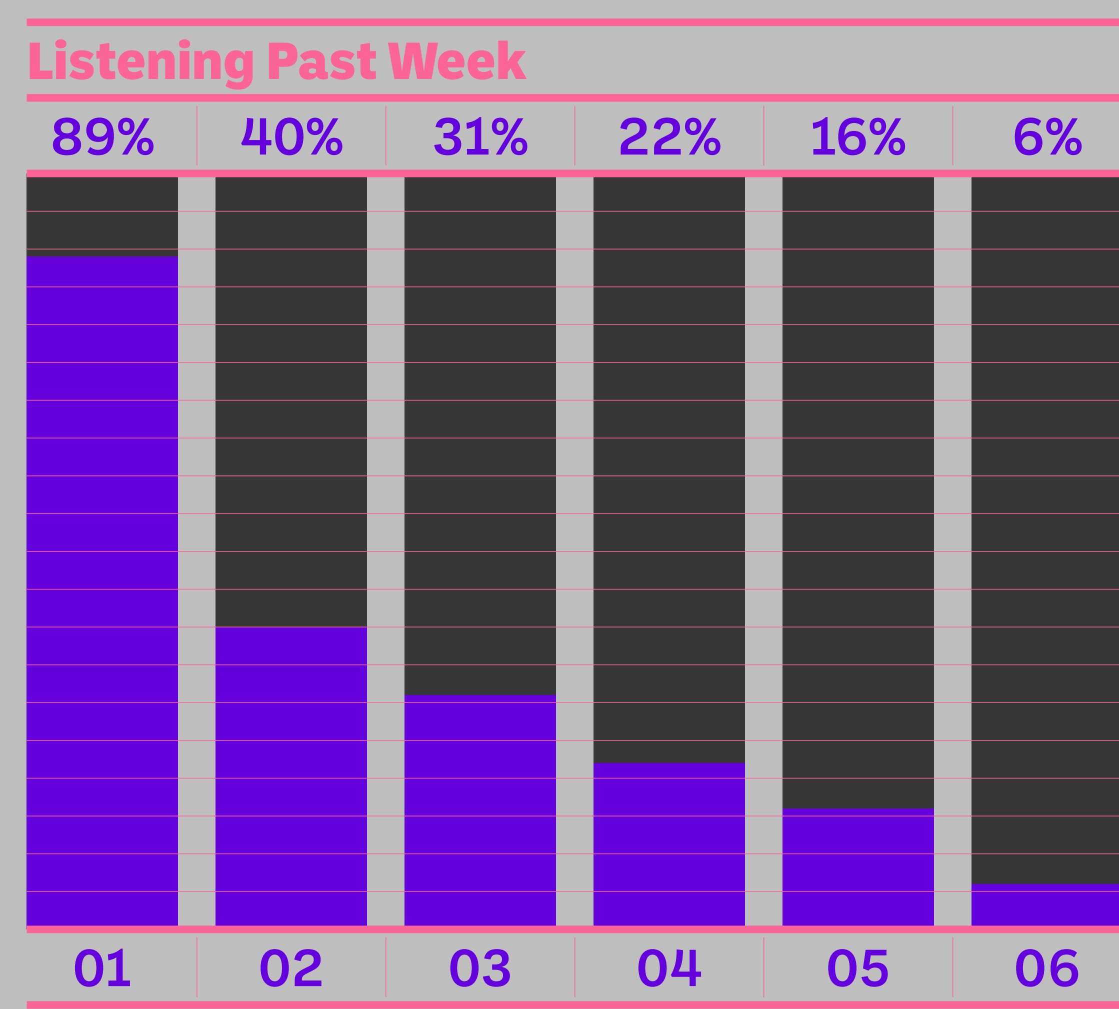
Examining individual audio formats, music streaming ranks second, reaching 40% of the population (+2%), followed by YouTube Music at 31% (+1%). Podcasting (=) and listen-back (=) remain unchanged at 22% and 6%, respectively.

Almost universal listening 4.2 million people tuning in.

89% listened to audio content in past WEEK.

The Audio Market
Weekly Listening Patterns

The chart below illustrates listening levels across the various audio formats Listening Past Week.



01	Listen to Live Radio
02	Listen to Music Streaming
03	Listen to YouTube Music
04	Listen to Podcast
05	Listen to Own Music
06	Listen Back On-Demand to Irish Radio

Source: JNLR 2025-2 Audio Module (Apr'25 to Jun'25 - 3 month Data).

Looking at listening trends over the past few years, the rate of change in live radio listening has been relatively slow, albeit in a downward direction — from 93% in 2019 to the current 89%. Similarly, for on- demand formats, after experiencing a significant increase in the 2021 survey, the pace of growth has since stabilised. As noted in previous reports, the most significant shift since 2019 has been the move from ‘own music’ (defined as personally archived or physical music) to on-demand streaming and podcasting.

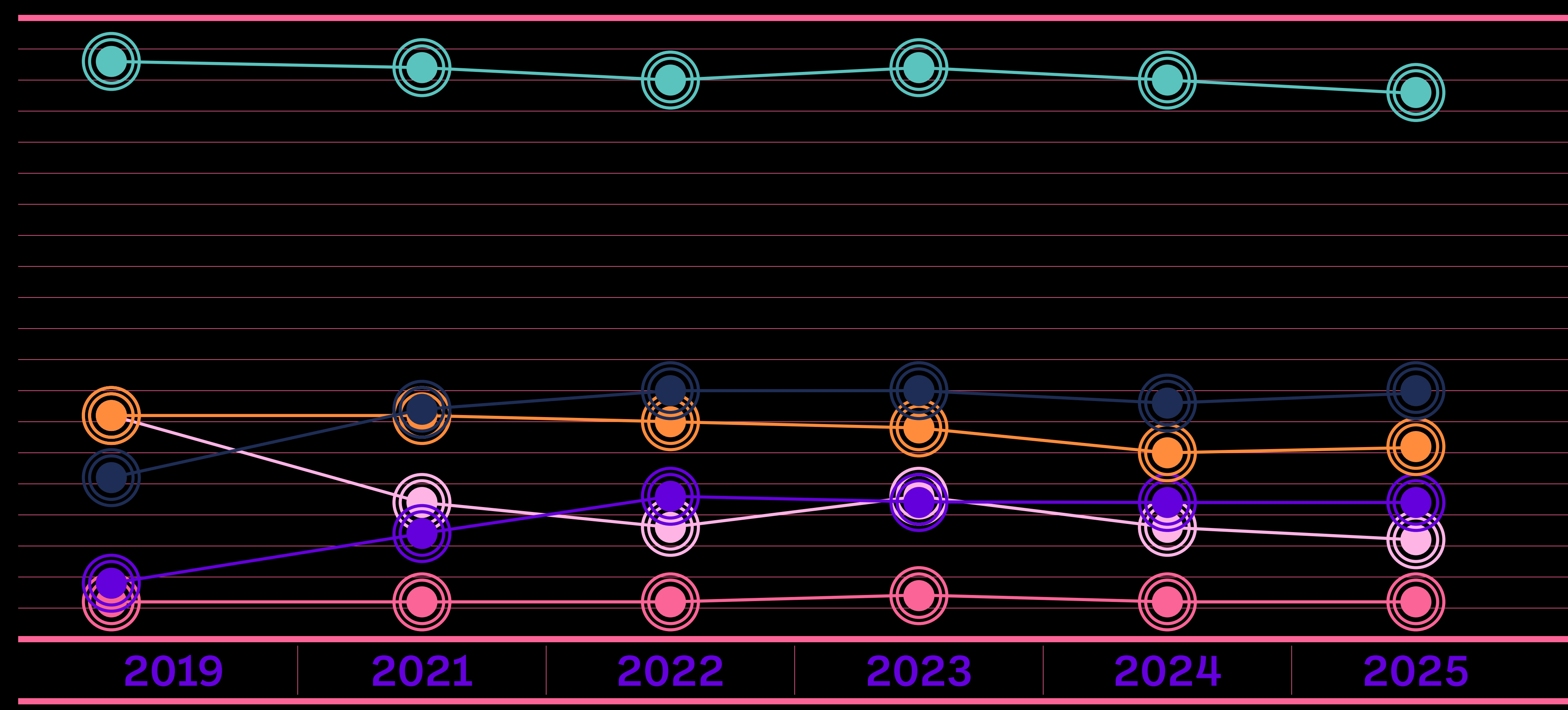
When we examine the data among the youngest cohort (15–24s), and again look at the trend over time, there is generally lower engagement with audio content — both radio and on-demand — within this group. ‘Any listening’ to audio has declined by five percentage points since 2022, from 99% to the current 94%. While this still represents substantial reach, overall engagement is now lower among this group than any other.

Although reach for online on-demand audio remains highest among this cohort, listening levels have declined over the years — and the drop has been steeper than for live radio — falling from 91% in 2022 to 76% in 2025. Live radio listening has also decreased over this period (-4%).

Comparing year-on-year figures, weekly listening to live radio among this group now stands at 81% (-3%). Music streaming, at 69%, also shows a decline (-4%), while podcast listening, at 25%, is down slightly (-1%). YouTube Music has seen the sharpest decline, with weekly reach at 45%, representing a drop of six percentage points in the past year.

Considering the next age group — 25–44-year-olds — overall engagement with audio remains steady at 97%. Year-on-year, there has been a three-percentage-point drop in live radio listening, to the current level of 86%, and a four-point increase in music streaming, now at 54%. Podcast listening among this age group stands at 32%, remaining broadly stable over the past few reporting years. This represents the highest reach for this format across all age groups.

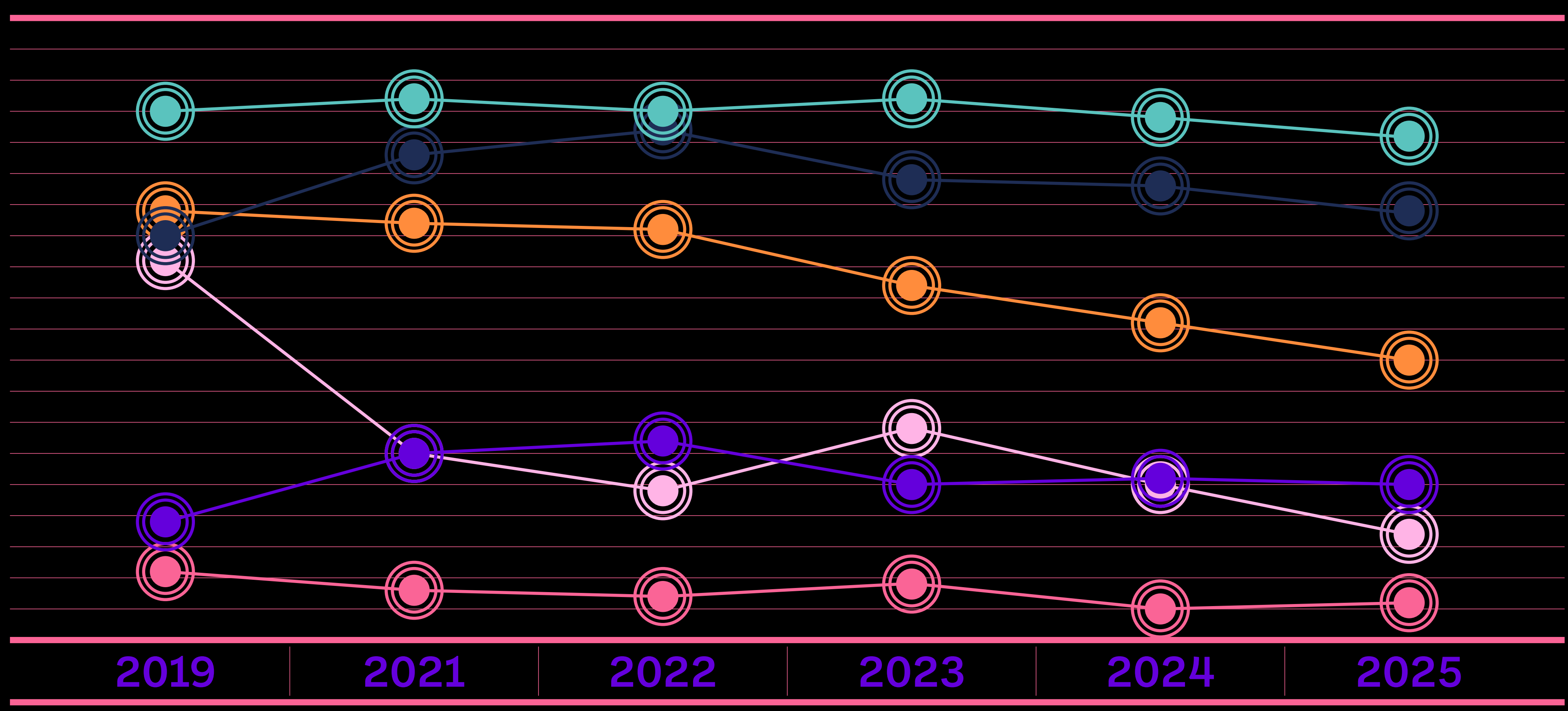
All 15+ Listening Past Week



Live Radio	88%
Music Streaming	40%
YouTube Music	31%
Any Podcast*	22%
Own Music	16%
Listen Back	6%

Source: JNLR 2025-2 Audio Module (Apr’25 to Jun’25 - 3 month Data).

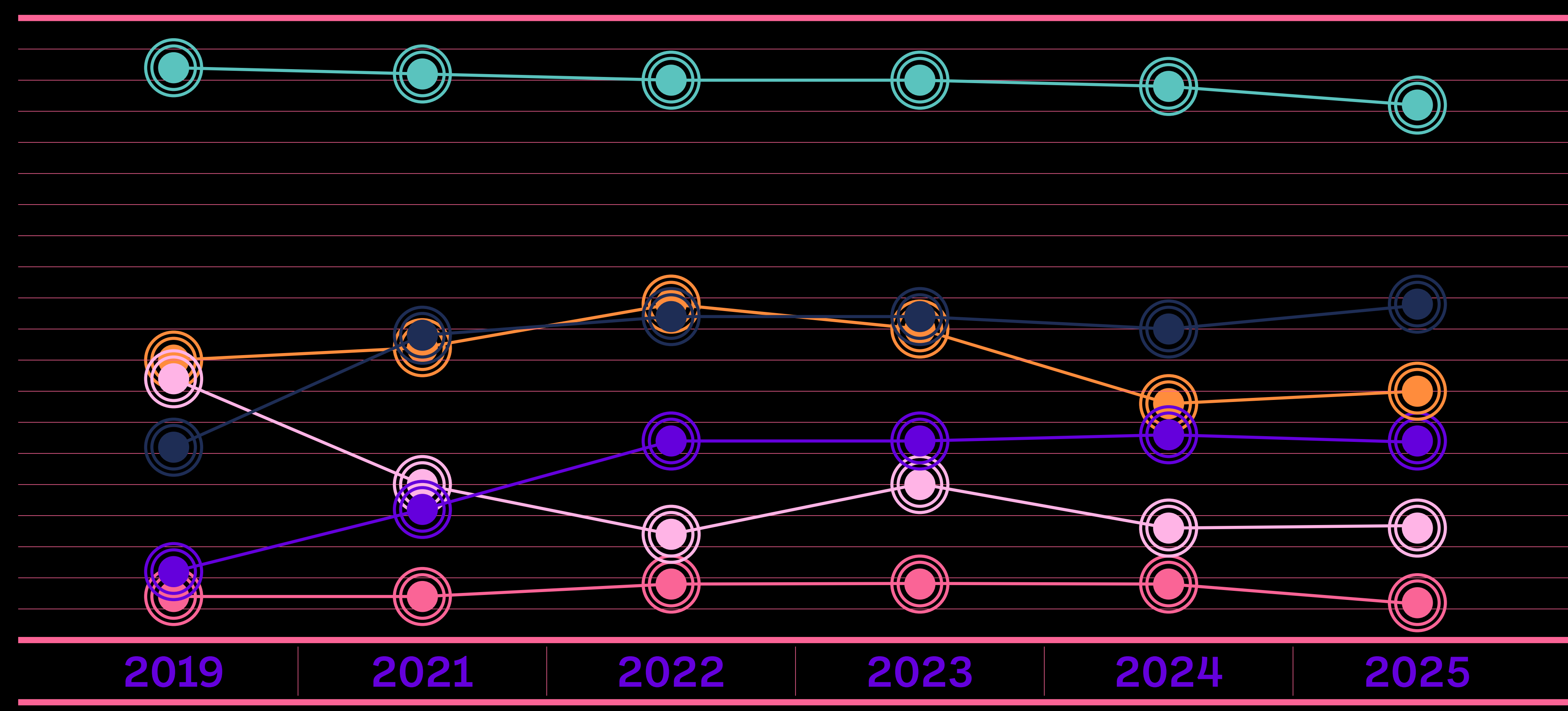
All 15-24's Listening Past Week



Live Radio	81%
Music Streaming	69%
YouTube Music	45%
Any Podcast*	25%
Own Music	18%
Listen Back	7%

Source: JNLR 2025-2 Audio Module
(Apr'25 to Jun'25 - 3 month Data).

All 25-44's Listening Past Week



Live Radio	86%
Music Streaming	54%
YouTube Music	40%
Any Podcast	32%
Own Music	18%
Listen Back	7%

Source: JNLR 2025-2 Audio Module
(Apr'25 to Jun'25 - 3 month Data).

Incremental Reach Weekly Listening Patterns

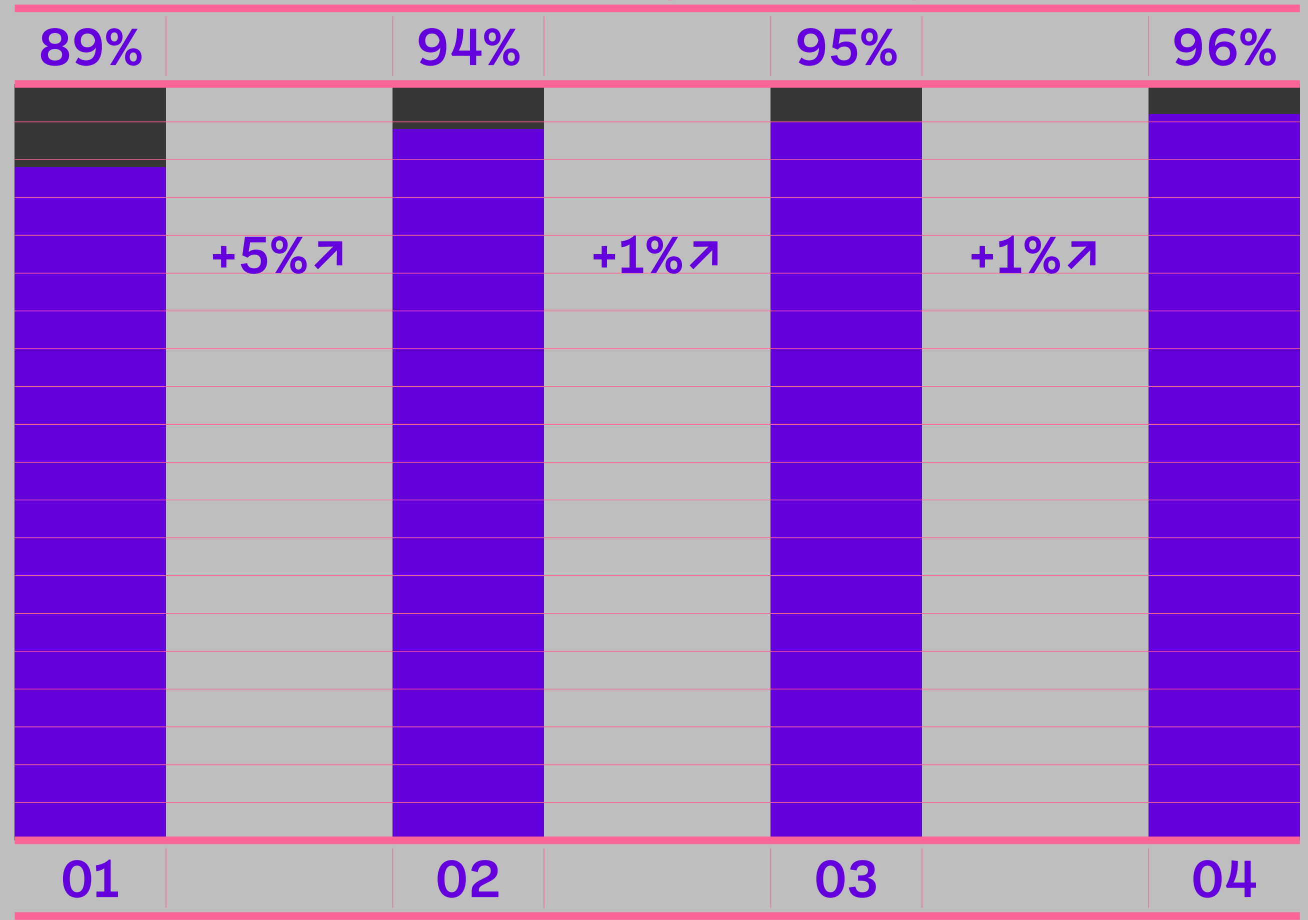
As outlined earlier, radio reaches the vast majority of the population on the measure of 'listening in the past week'. Combining reach to live radio and listen-back services, the audience figure currently stands at 89%. Broadening this definition to include streaming increases reach by a further 5 percentage points, with an additional 1 point gained when podcast audiences are included. Together, these three formats reach 95% of the adult population each week.

In contrast, fewer than half of adults (46%) are reached through the combination of streaming and podcasting activity alone. This relatively modest incremental growth reflects the significant cross-over in listening between digital streaming and radio audiences, reinforcing the finding that including radio in the mix delivers maximum reach.

Weekly Listening Patterns

The chart below illustrates listening Patterns across the various audio formats Listening Past Week.

Incremental Reach–Weekly Listening



01	Any Radio (Live/ On-Demand)
02	Any Radio/Streaming
03	Any Radio/Streaming/Podcasts
04	Any Radio/Streaming/Podcasts/Youtube

Source: JNLR 2025-2 Audio Module (Apr'25 to Jun'25 - 3 month Data).

Daily Listening Patterns and Time spent listening

In terms of daily listening patterns (average 'yesterday' listening), live radio remains the number one choice among the population and continues to be the leading audio format across all age groups.

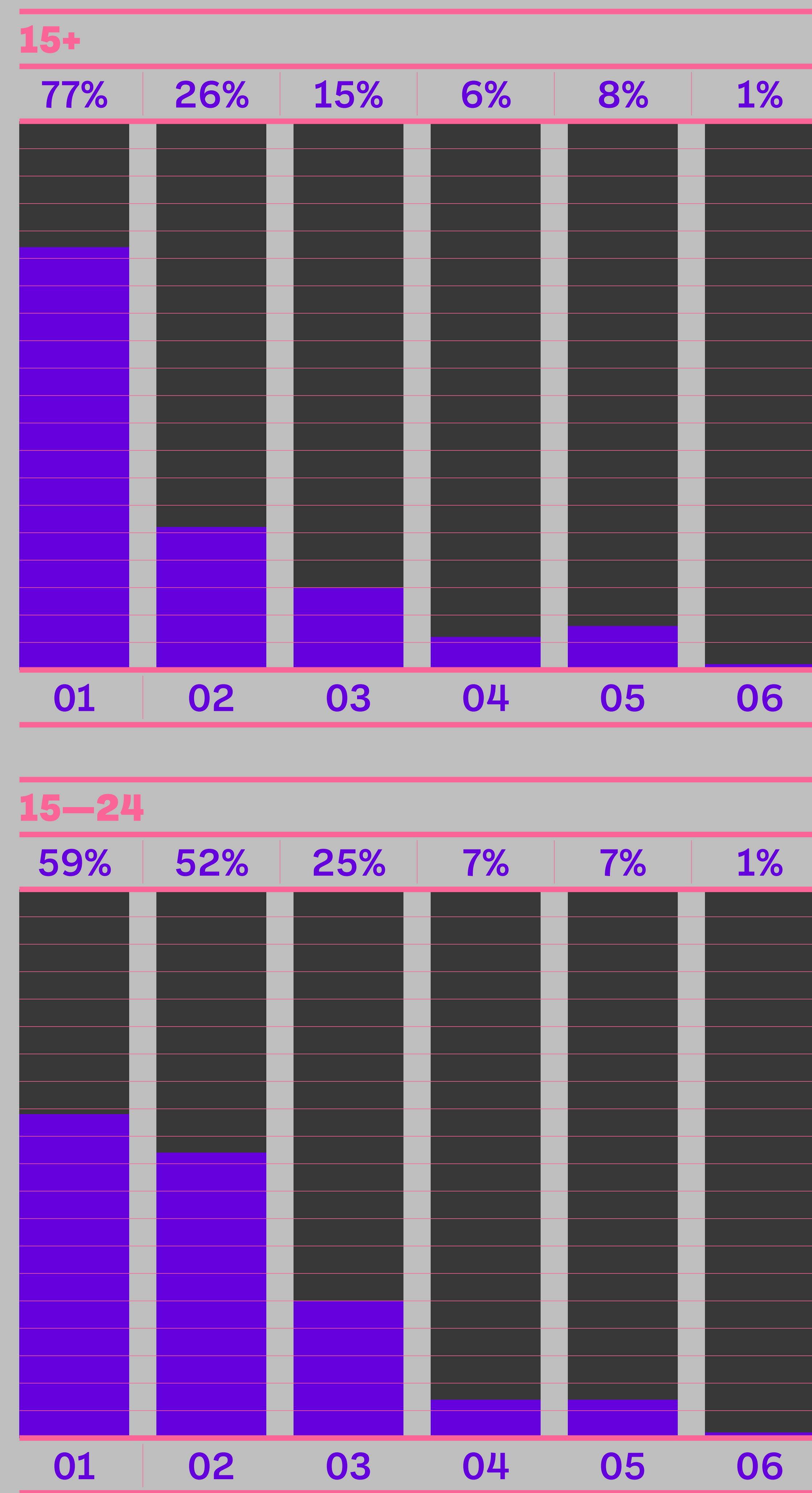
Daily listening to live radio now stands at 77% among those aged 15 and over. This compares with 36% for on-demand online audio. One-quarter of the population (26%) listen to streamed music, while 8% listen to podcasts on an average day. Overall, the data shows that radio represents a daily and habitual behaviour for the majority of the population. Among the younger 15–24-year-old cohort, daily listening to on-demand online audio (58%) runs a close second to live radio (59%), driven largely by music streaming (52%).

For each audio format listened to yesterday, respondents provided an estimate of the time spent listening. The analysis shows that listeners tend to engage with on-demand content for shorter periods compared with live radio — most likely reflecting the curated or episodic nature of on-demand podcasts and clips.

The chart on page 34 illustrates the relative positions across the different audio formats.

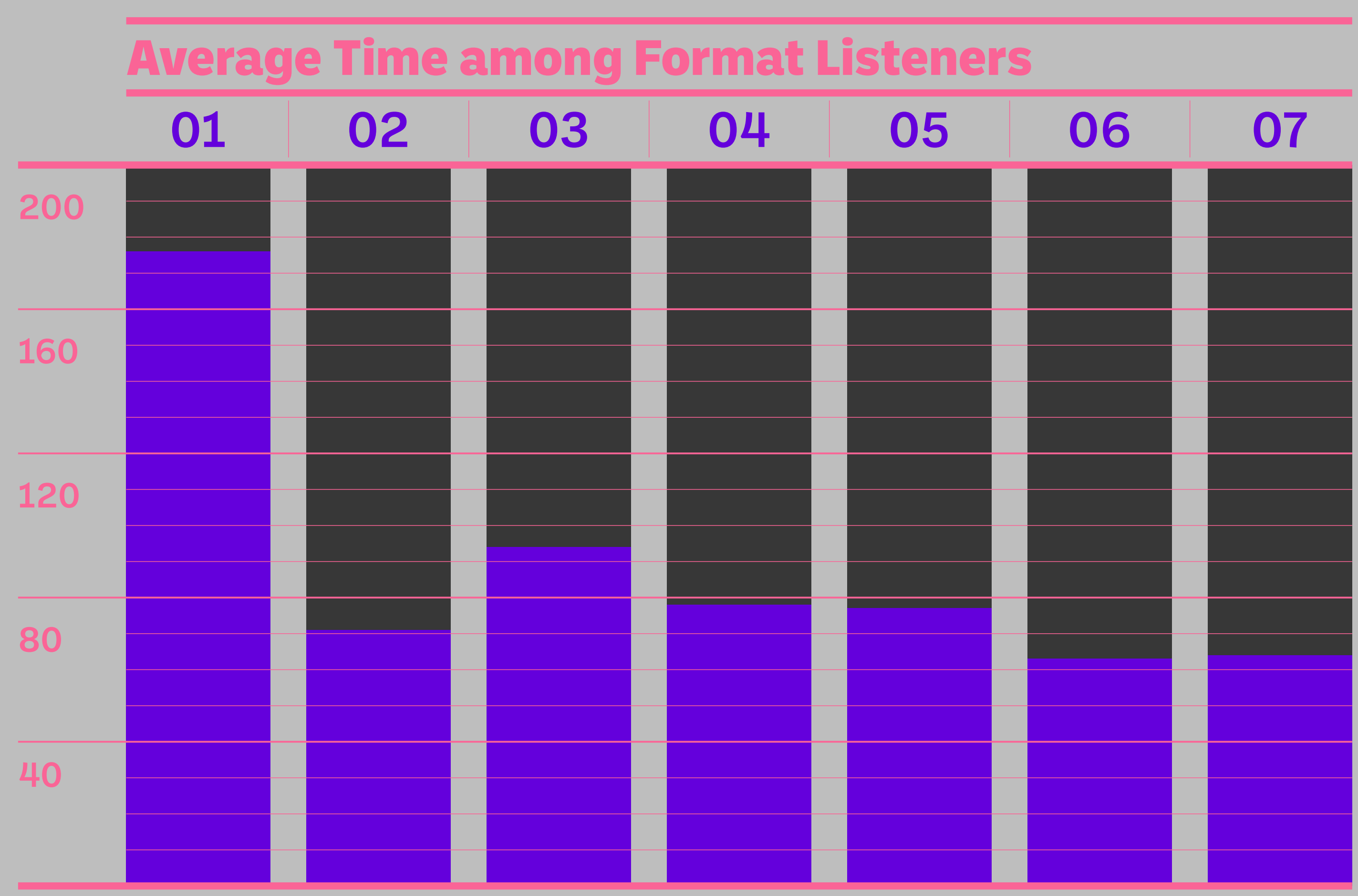
Audio Reach, Average Day

Source: JNLR 2025-2 Audio Module
(Apr'25 to Jun'25 - 3 month Data).



01	Live Radio
02	Music Streaming (Spotify & Other)
03	YouTube Music
04	Own Music
05	Podcast
06	Listen Back to Irish Radio

Average Time Spent Relative Position Among Audio Format Listeners



- 01 Live Radio
- 02 Listen Back to Irish Radio
- 03 Music Streaming (Spotify & Other)
- 04 YouTube Music
- 05 Own Music
- 06 Irish Podcast
- 07 International Podcast

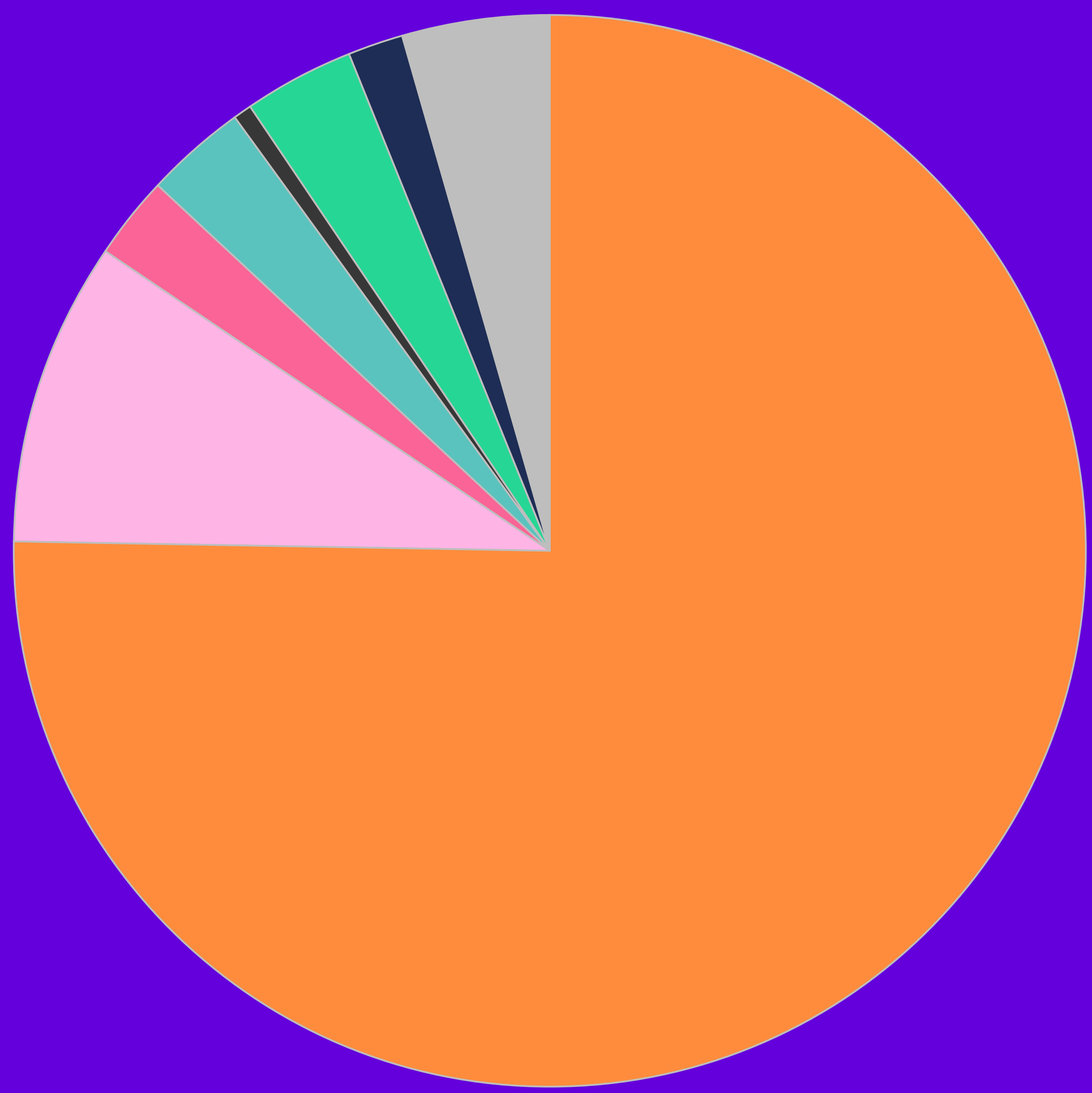
Source: JNLR 2025-2 Audio Module
(Apr'25 to Jun'25 - 3 month Data).

The Audio Market Share of Time Spent Listening

The analysis earlier shows that listeners tend to engage with on-demand content for shorter periods compared with live radio. This pattern of listening naturally impacts the share of time spent — more listeners who listen for longer periods result in a higher share of the audio market.

Among the 15+ population, live radio currently accounts for 73.8% of total time spent listening to audio content. The chart on page 36 illustrates the relative share positions in 2025.

The Audio Market Share of Time Spent Listening



All

Live Radio	73.8%
Music Streaming, Paid (Spotify & Other)	10.5%
Music Streaming, Free	3.0%
Own Music	2.4%
Listen Back to Irish Radio	0.3%
Podcast	3.5%
YouTube, Paid Premium	2.2%
YouTube, Free	4.1%

Source: JNLR 2025-2 Audio Module (Apr'25 to Jun'25 - 3 month Data). *This analysis assumes that paid-up subscribers to Audio Streaming and YouTube use the premium services to listen.

Audio Share of Time Spent Trend

Radio's share has declined slightly since 2024 (-1.7%), while streaming has increased by a corresponding amount. Podcasts account for a 3.5% share, remaining more or less unchanged year-on-year. The chart below shows the share trend since 2020/21.

Year	2021	2022	2023	2024	2025
Live Radio	78.8	74.3	73.9	75.5	73.8
Listen Back to Irish Radio	0.6	0.7	0.4	0.5	0.3
Any Radio (Live or listen back)	79.4	75.0	74.3	76.0	74.2
Music Streaming (Spotify & Other)	10.0	12.2	11.6	11.8	13.5
YouTube Music	6.0	6.5	6.7	5.9	6.4
Own Music	2.8	2.5	4.3	3.0	2.4
Any Podcast	1.7	3.8	3.2	3.4	3.5
Percentage	%	%	%	%	%

Source: JNLR 2025-2 Audio Module (Apr'25 to Jun'25 - 3 month Data).

Audio Estimated Share of Time Spent, Average Day

While fluctuations across formats and year-on-year changes tend to be relatively small, the broader trend in share of time spent since 2021 shows a decline for radio and an increase for streaming and podcasting. Other formats have remained largely unchanged.

Among the younger 15–24 cohort, live radio accounts for 46.4% of all audio listening minutes — almost identical to its share in 2024 — followed by audio streaming at 32.6%. Once again, this reflects a year-on-year decline in 'own music' and a modest increase in both music streaming and YouTube Music. Podcast share remains almost unchanged at 3.3% among this age group.

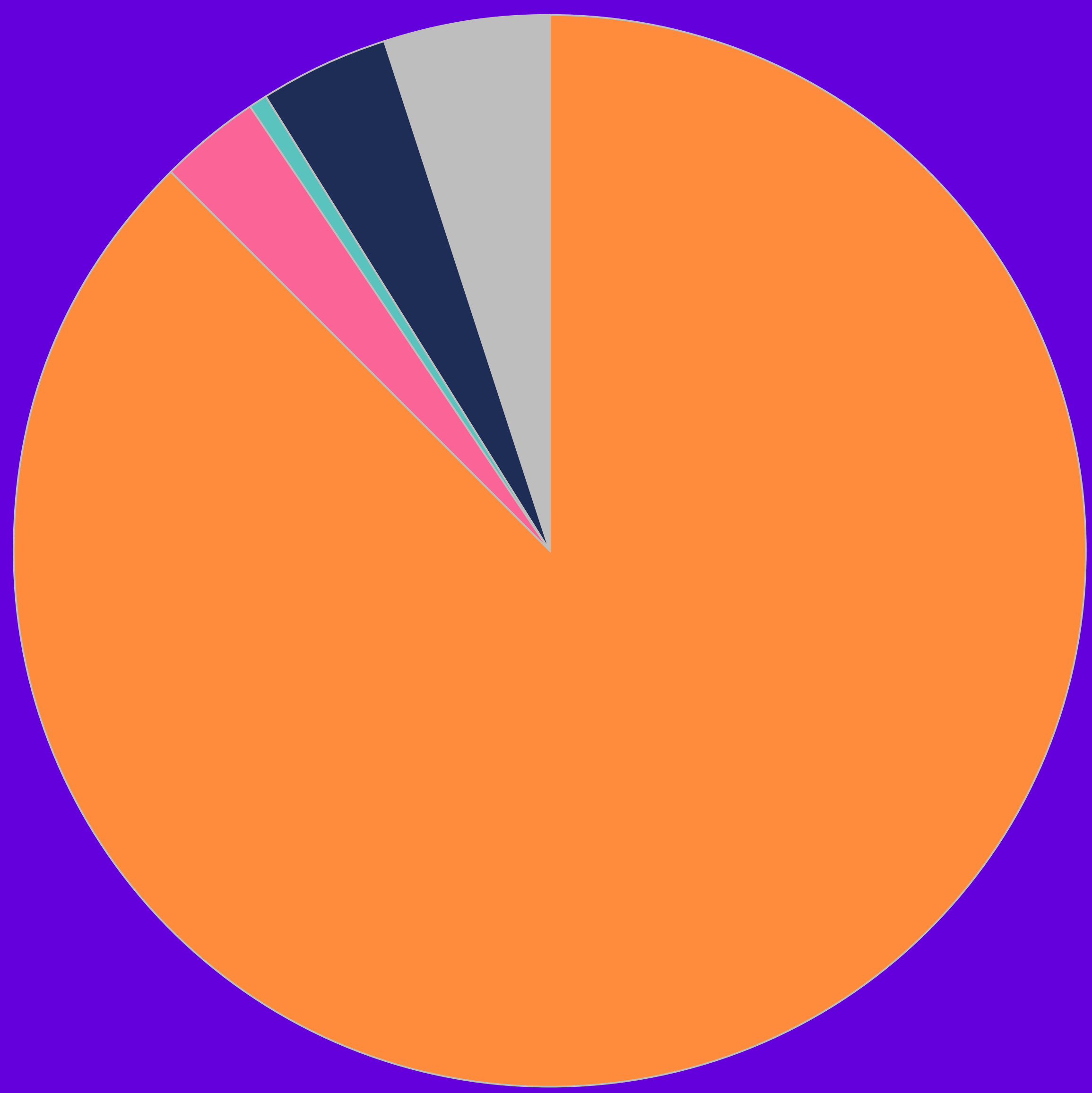
Across the measured years, there is a clear trend of incremental growth in time spent on streaming and podcasting among older listeners aged 45–64 and 65+, albeit from a relatively low base. The chart on page 39 shows the share of time spent by key demographics.

Audio Estimated Share of Time Spent, Average Day

Age Range	15+	15-24	25-44	45-64	65+
Live Radio	73.8	46.4	63.3	83.2	94.9
Listen Back to Irish Radio	0.3	0.1	0.4	0.4	0.3
Any Radio (Live or listen back)	74.2	46.5	63.7	83.6	95.2
Music Streaming (Spotify & Other)	13.5	32.6	18.8	7.3	1.7
YouTube Music	6.4	12.8	9.4	3.8	1.1
Own Music	2.4	4.7	2.8	1.9	0.9
Any Podcast	3.5	3.3	5.3	3.4	1.0
Irish Podcast	1.7	2.2	2.5	1.6	0.4
International Podcast	1.8	1.1	2.8	1.8	0.5
Percentage	%	%	%	%	%

Source: JNLR 2025-2 Audio Module
(Apr'25 to Jun'25 - 3 month Data).

Share Of Commercial Audio



All

Live Radio	87.0%
Music Streaming, Paid (Spotify & Other)	3.6%
Listen Back to Irish Radio	0.4%
Podcast	4.2%
YouTube Music	4.8%

Source: JNLR 2025-2 Audio Module (Apr'25 to Jun'25 - 3 month Data). *This analysis assumes that paid-up subscribers to Audio Streaming and YouTube use the premium services to listen.

Share Of Commercial Audio

From a commercial perspective, not all audio content is available for advertising. As noted earlier in the report, a significant proportion of music streaming and YouTube listeners access content through paid subscriptions. In addition, listeners consume ad-free music stored in their own archives. When these potential ad-free audiences are excluded, the share of time spent takes on a different dimension.

In this commercial context, live radio accounts for 87.0% of total listening time, with on-demand —including free, ad-supported music streaming and YouTube — at 13.0%. This represents only a marginal change since 2024, when live radio's share stood at 87.5%.

Among younger audiences aged 15–24, live radio achieves a 67.3% share, down 2.7 percentage points since 2024.

03

Our Audio Environment

Where we listen to Audio

Home remains the heart of audio consumption. When asked about their listening habits 'yesterday', two-thirds (67%) of respondents said they listened to audio content at home. This behaviour is consistent across all age groups but, unsurprisingly, is most pronounced among older audiences, with 82% of those aged 65 and over tuning in from home. Live radio continues to dominate in-home listening, with 53% tuning in daily. Music streaming services are the next most-listened-to format (16%), while YouTube Music (11%) and podcasts (5%) remain smaller but established parts of the in-home audio mix.

Listening by Location Trend

Year	2021	2022	2023	2024	2025
At home	75	74	69	71	67
Car/Van	34	39	41	43	49
Work/School/College	9	11	11	11	12
Out Walking/Cycling/Running	8	9	11	8	10
Bus/Train/Dart	1	2	3	2	2
Someone Else's Home	1	1	1	1	1
Percentage	%	%	%	%	%

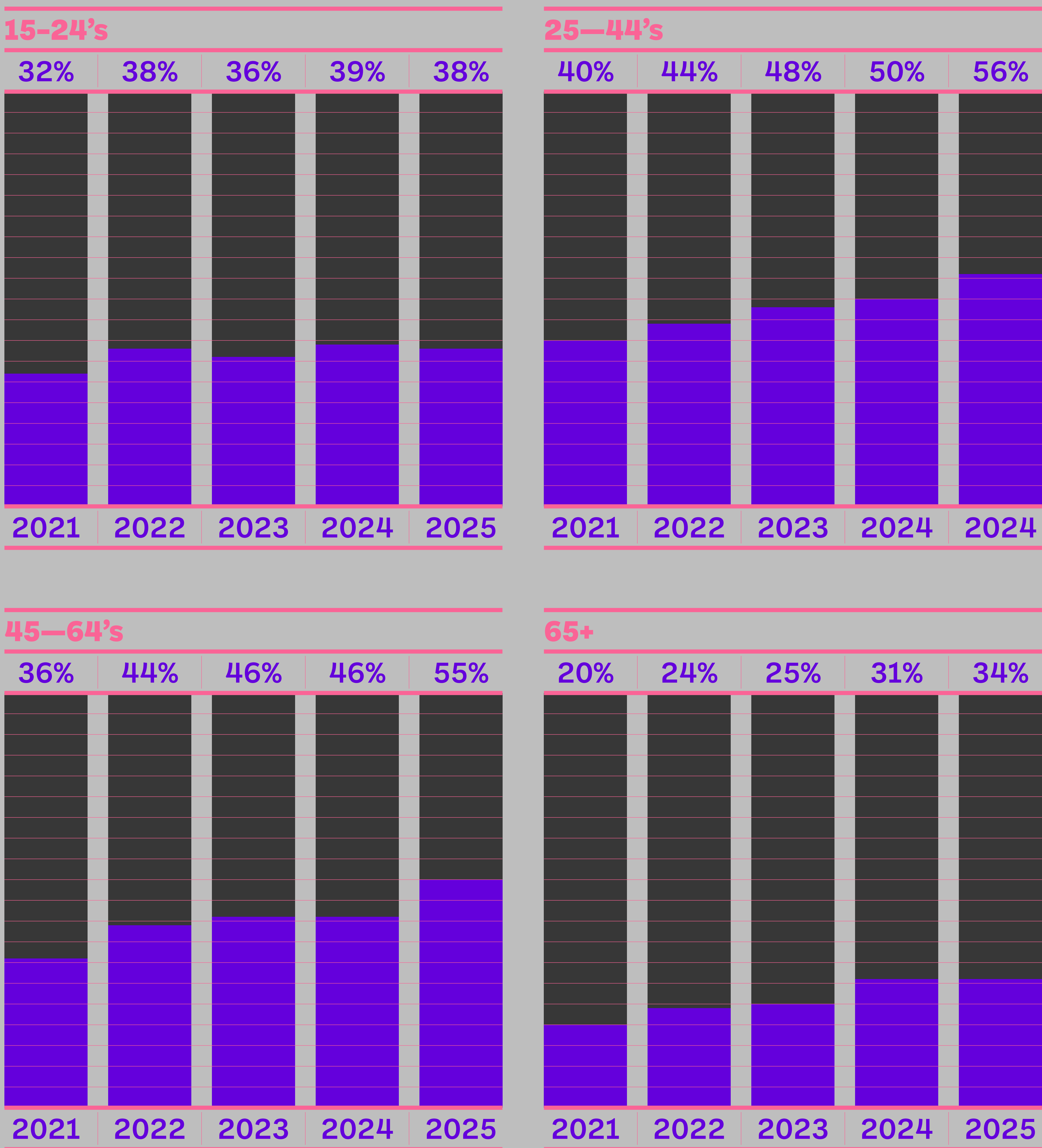
Source: JNLR 2025-2 Audio Module
(Apr'25 to Jun'25 - 3 month Data).

The car is the second most popular location for audio consumption, with 49% of people listening while driving — a figure that has grown steadily since 2021 (the COVID years), rising by 15 percentage points. While listening skews towards young to mid-life audiences, with over half of 25–44 and 45–64-year-olds listening in the car, there is evidence of increased listening year-on-year among all but the youngest group (15–24s). Live radio remains the go-to format in this setting, with 44% listening daily in the car. Streaming services are less prevalent, at 7%, though usage has increased by two percentage points in 2025.

Listening at work, school, or college is less common overall, reported by 12% of respondents, but notably higher among those aged 25–44 (16%). Live radio is again the most frequent choice in these environments (8%), followed by music streaming (4%). Among those with a streaming subscription, this figure rises to 9%.

Finally, one in ten people listen to audio content 'on the go' while walking, cycling, or running. While this is up marginally on last year, the trend remains broadly in line with previous years. Younger audiences lead this behaviour, with 19% of 15–24s listening while out and about. In this environment, and among this younger group, music streaming is the leading format (12%), while live radio (5%) and YouTube Music (4%) also feature in the mix. Fewer than 1% of 15–24s engage with podcasts while on the move.

Audio Listening in Car Trend



Source: JNLR 2025-2 Audio Module
(Apr'25 to Jun'25 - 3 month Data).

How We Listen to Audio Devices Used to Listen to Audio

Despite an evolving digital landscape, traditional devices continue to anchor audio listening habits. Two-thirds (67%) of people listen daily via a dedicated radio or music system (including CD players and turntables). This behaviour is particularly strong among older listeners, with 80% of those aged 65 and over using these devices daily, compared with 42% of 15–24s.

Audio Activity Average Day

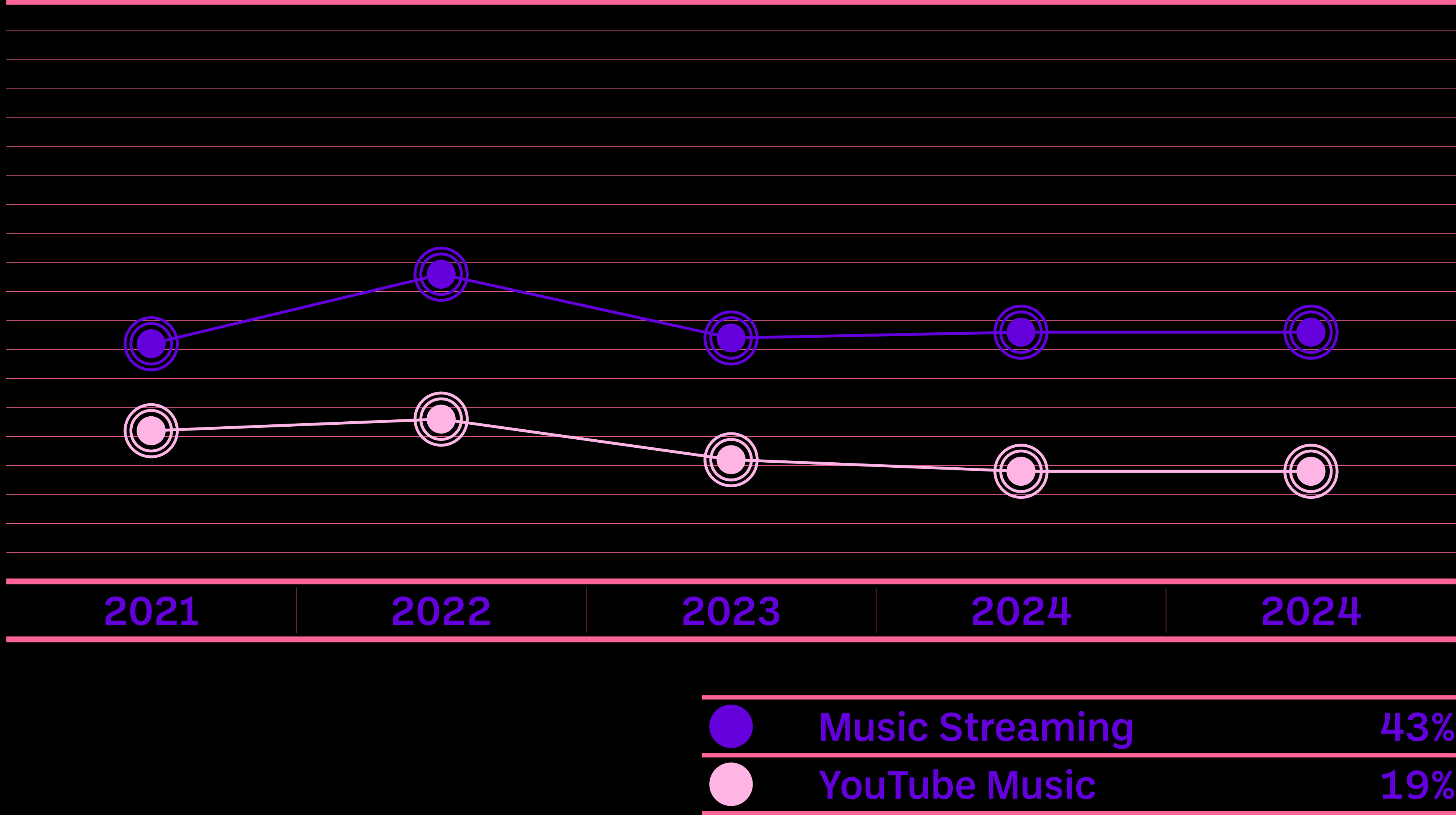
Device	All 15+	15-24	24-44	44+
Used Radio/Music System	67	42	63	78
Used Smartphone	32	55	44	18
Used Smart Speaker	11	12	13	10
Used PC/Laptop	5	6	7	4
Used Tablet	3	3	4	2
Used TV	4	5	4	3
Percentage	%	%	%	%

Source: JNLR 2025-2 Audio Module
(Apr'25 to Jun'25 - 3 month Data).

Listening via mobile or smartphone has increased year-on-year, with 32% of people now using their device to access audio content. Streaming services are the primary driver of this behaviour, with 21% of listeners streaming daily on mobile. Younger audiences, in particular, embrace mobile listening, with 43% of 15–24-year-olds streaming daily on their phones.

A similar trend is evident for YouTube Music, although its popularity on mobile has declined slightly. After peaking among 15–24s in 2022, usage has fallen by nine percentage points to 19% within this group in 2025.

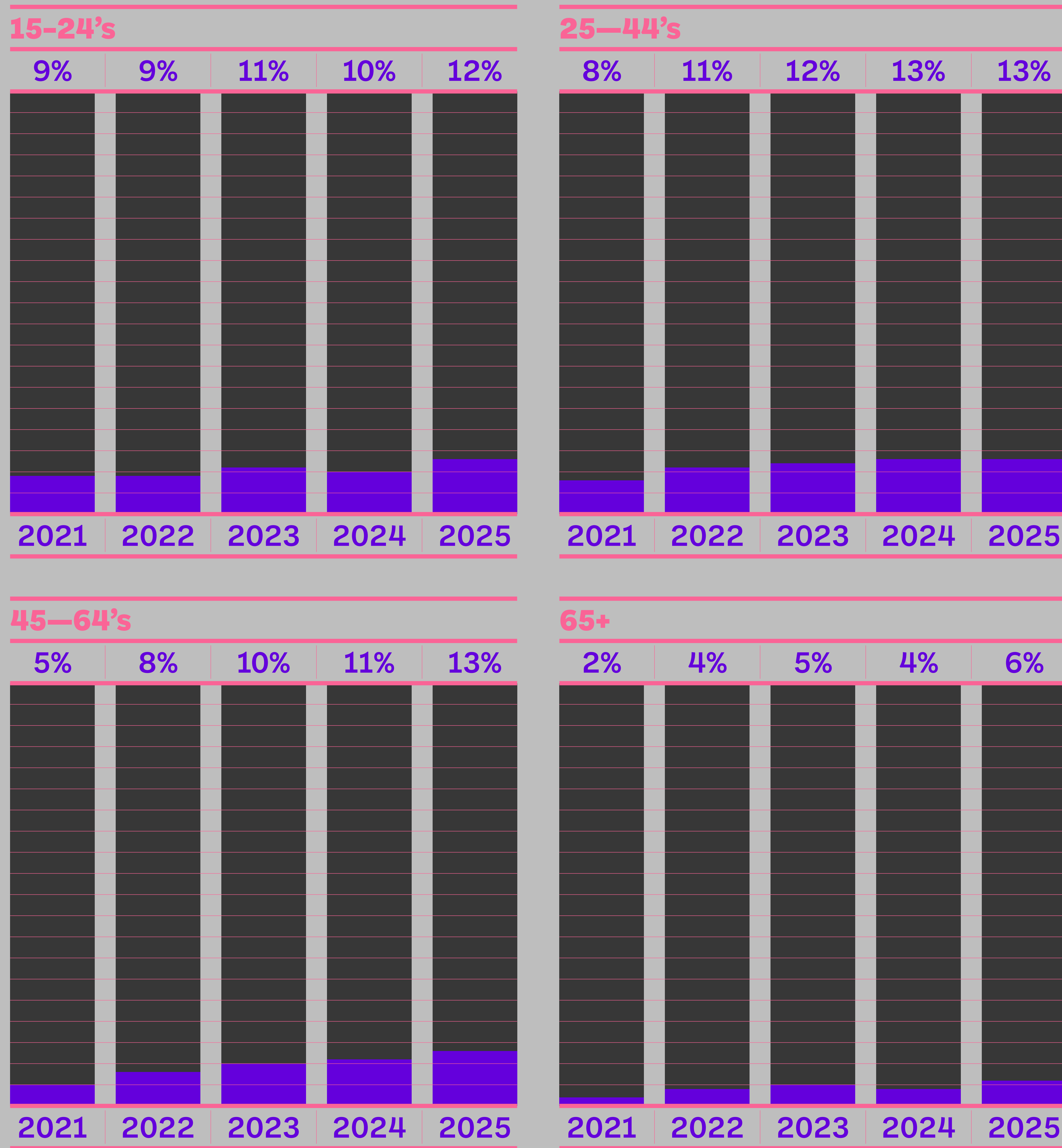
Smartphone/Mobile Streaming Trend Among 15-24'S



Source: JNLR 2025-2 Audio Module
(Apr'25 to Jun'25 - 3 month Data).

Audio Listening On Smart Speaker

Smart speakers such as Amazon Alexa continue their slow but steady rise in the audio space, with 11% of people now using the device to listen daily. Among those who own one, 24% use a smart speaker to listen — a modest but consistent increase that signals the ongoing adoption of voice-activated devices in everyday audio listening.



JNLR Survey

The JNLR survey measures radio listening activity among the general public, aged 15+, in the Republic of Ireland. The survey is a continuous one, with interviews conducted across the twelve months of the year among a sample of c16,800 respondents. Since 2017, each year in Quarter 2 (April, May and June) an additional module is included alongside the core questionnaire, which addresses activity on the broader audio market.

In this module, questions address engagement in the various audio formats including live radio, audio streaming, listen back, podcasting, YouTube music and personal music archives (referred to in this report as 'own music').

Notes on the Report

This report is sourced from JNLR data collected in Quarter 2, 2025 (April to June 2025).

The data in this report is based on a large national sample of 3,075 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.

Data on the broader audio market is based on the JNLR Audio Module, implemented in tandem with the core interview during the specific 3-month period, April to June 2025.

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

For More Information

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