THE IRISH AUDIO REPORT 2023

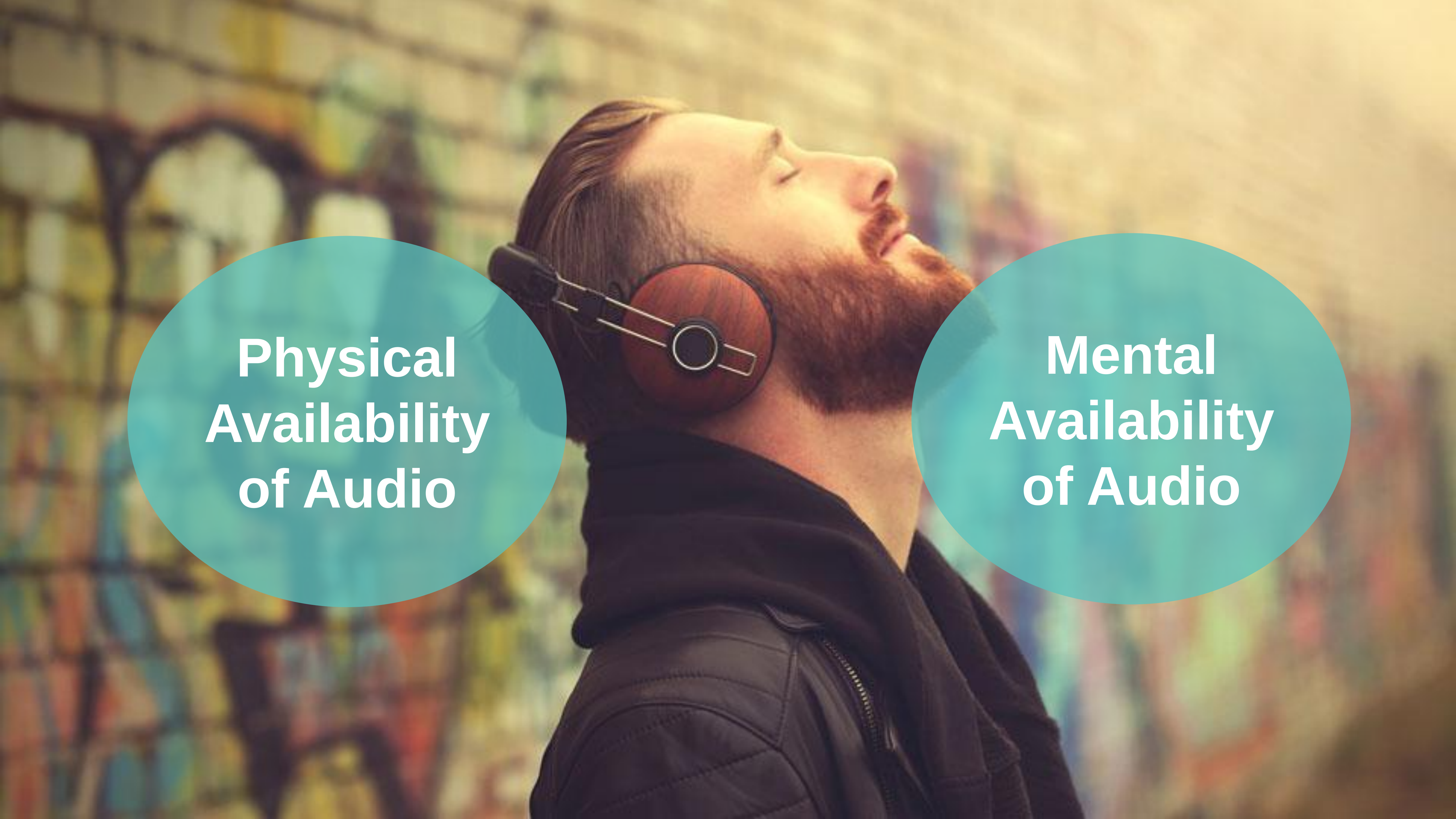
JOINT NATIONAL LISTENERSHIP RESEARCH

RADIOCENTRE IRELAND

Ipsos

Contents

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

0%

45%

2014

2023

Smartphone Penetration

70%

92%

2014

2023

Source: Ipsos MRBI Media Platform Report


Personal
Keep me in the loop
Help me escape
Lift my mood
Content
Broaden my horizons
Audio satisfies seven contemporary need states
Context
Keep me company
Fuel Conversations
Amplify the moment
Social

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

Core JNLR Data – A Recap

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80.2%

listen to radio on average day

3.3 million

people listening on average day

4 hrs 7 mins

average time spent per listener per day

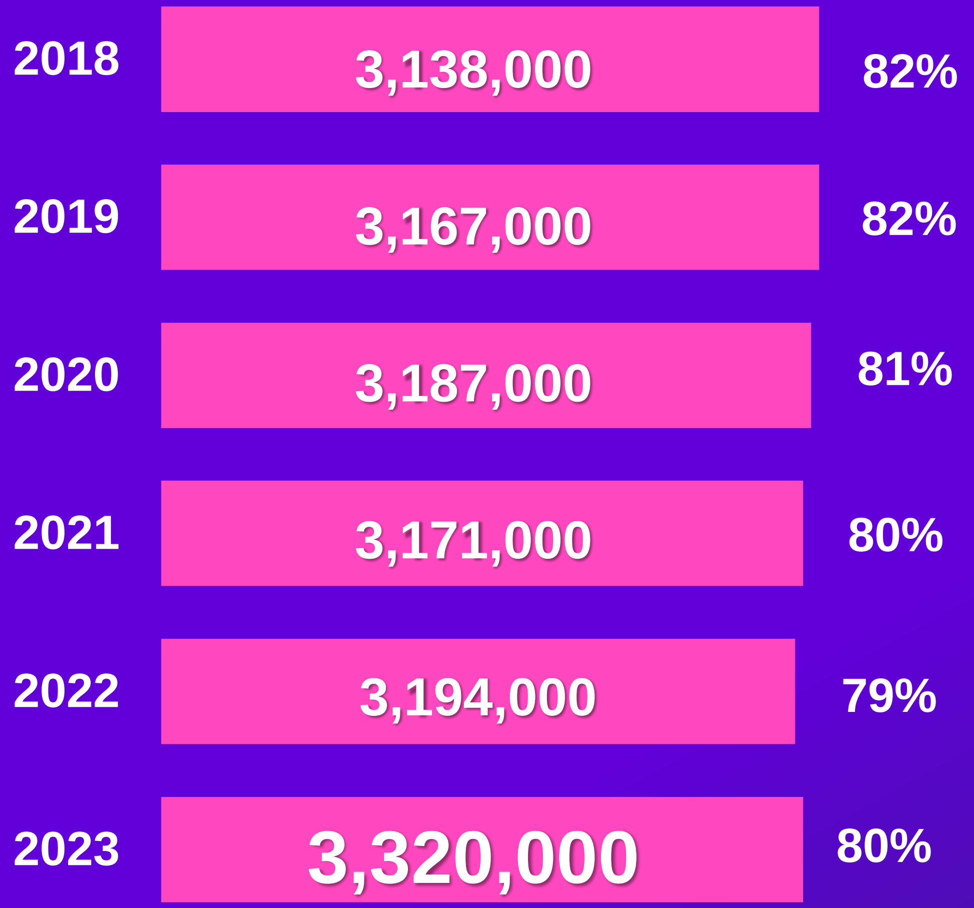
13.4 million

total hours per day

Radio is in a very strong position in 2023. More than 3 million listeners tune in every day, listening for a total of 13.4 million hours.

Source: JNLR 2023-2 Core Interview (Jul '22 to Jun '23 – 12 mth data)
Base: All 15+ - Mins/hours - 7am to Midnight

Radio Reach – Average day



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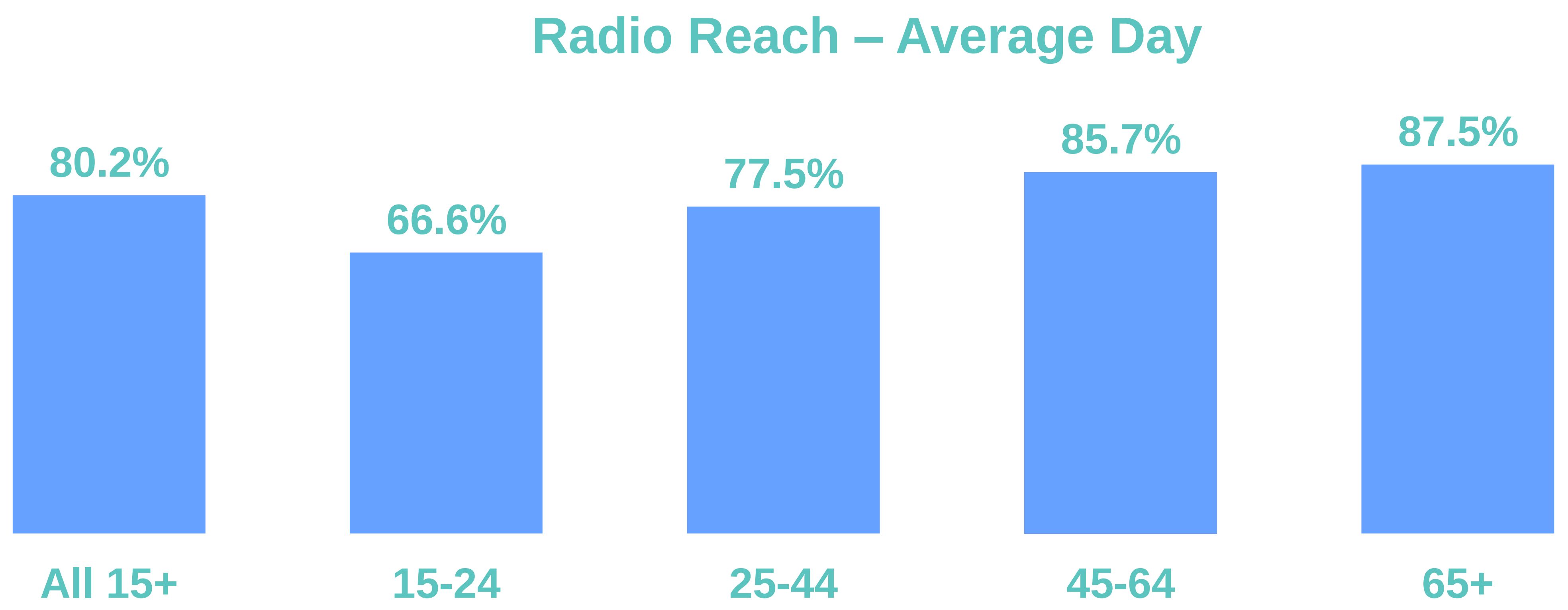
Radio daily audiences have grown over the past 5 years to 3.3 million listeners .

Source: JNLR 2023-2 Core Interview (Jul '22 to Jun '23 – 12 mth data)
Base: All 15+

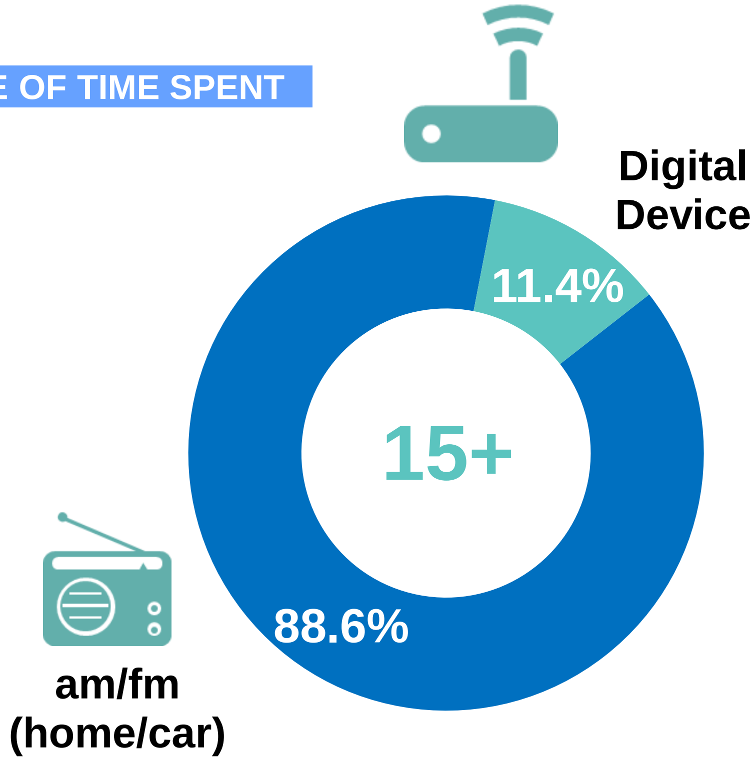
Radio delivers significant reach across all age cohorts.

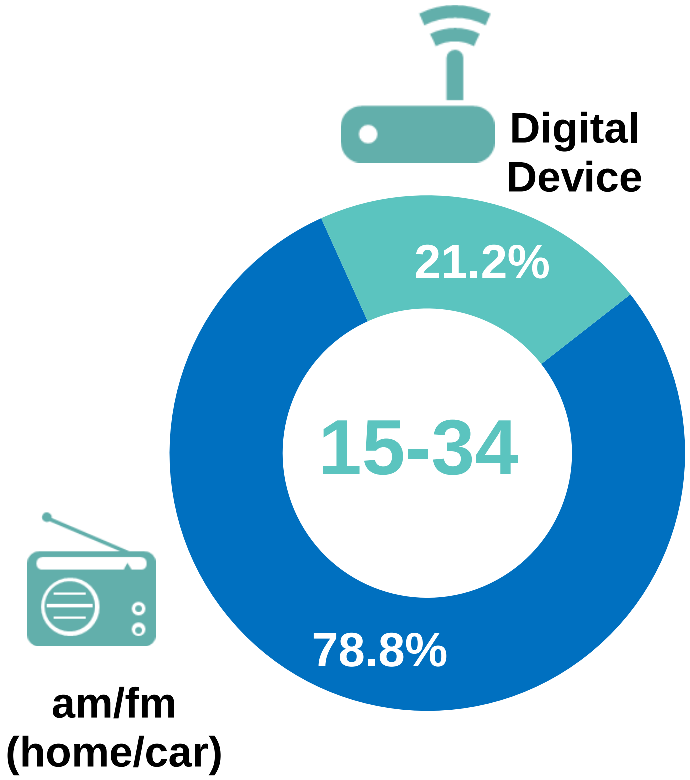


Source: JNLR 2023-2 Core Interview (Jul '22 to Jun '23 – 12 mth data)
Base: All 15+

While most listening to radio happens on the FM radio – more than half million (546,000) listen on digital platforms delivering 11% share of radio minutes on the average day

SHARE OF TIME SPENT





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

Source: JNLR 2023-2 Core Interview (Jul ’22 to Jun ‘23 – 12 mth data)
Base:

Technology Enables Access

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Irish audiences are highly connected

91%
HAVE BROADBAND ACCESS

92%
OWN SMART PHONE

45%
OWN VOICE ACTIVATED TECH/SMART SPEAKER

52%
OWN BLUETOOTH WIRELESS HEADPHONES

Source: JNLR 2023-2 Audio Module (Apr ’23 to Jun’23 – 3 mth data)
Base: All 15+

Almost two-in-five (38%) are subscribing to one or other of these online platforms for audio content

33%

Paid Subscription (Ad free)
Audio Streaming
(such as Spotify Premium)

13%

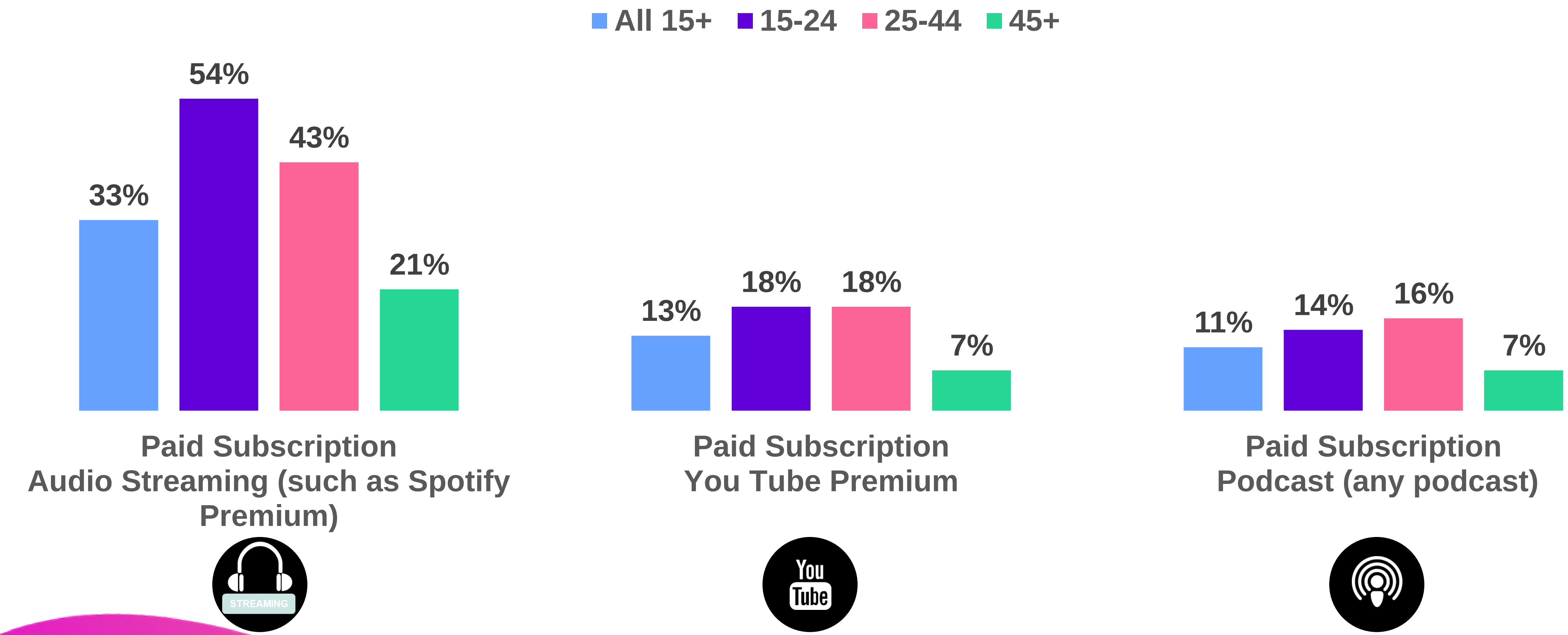
Paid Subscription (Ad free)
You Tube Premium

11%

Paid Subscription
Podcasts

Source: JNLR 2023-2 Audio Module (Apr '23 to Jun'23 – 3 mth data)
Base: All 15+

Younger people more likely to pay for audio content



Source: JNLR 2023-2 Audio Module (Apr ’23 to Jun ’23 – 3 mth data)
Base: All 15+

Our Daily Audio Environment

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While most audio listening activity happens at home, a significant proportion are listening in the car.

Technology features strongly in this space. Almost 1 in 3 people listen to audio on a smart phone.

69%
listen to audio at home

70%
use a radio/music system to listen

41%
listen to audio in the car

30%
use a smart phone to listen

Source: JNLR 2023-2 Audio Module (Apr '23 to Jun '23 – 3 mth data)
Base: All 15+

While radio remains the most used device among listeners to audio content, significant proportions use a connected device.

Any Audio Activity – Average Day

70%
USED RADIO/ MUSIC SYSTEM

30%
USED SMART PHONE

10%
USED SMART SPEAKER

7%
USED PC/ LAPTOP

3%
USED TABLET

3%
USED TV

3%
USED OTHER SYSTEM

Source: JNLR 2023-2 Audio Module (Apr ’23 to Jun ’23 – 3 mth data)
Base: All 15+

Smartphone most used device among the younger 15-24's

	Audio Activity - Average Day			
	All 15+	15-24	25-44	45+
Used radio/music system	70	49	66	80
Used smartphone	30	**60**	36	16
Used smart speaker	10	11	12	8
Used PC/ laptop	7	9	8	5
Used tablet	3	2	4	2
Used TV	3	3	4	3

Source: JNLR 2023-2 Audio Module (Apr '23 to Jun '23 – 3 mth data)
Base: All 15+

Most listening to audio material happens at home

Any Audio Activity – Average Day

69%	41%	11%	11%	3%	1%
AT HOME	CAR/ VAN	WORK/ SCHOOL/ COLLEGE	OUT WALKING/ CYCLING/ RUNNING	BUS/ TRAIN/ DART	SOMEONE ELSE'S HOME

Source: JNLR 2023-2 Audio Module (Apr'23 to Jun'23 – 3 mth data)
Base: All 15+

In car listening has increased marginally and peaks among those in employment

50%

Half of those in employment listen to audio content in car/ van on the average day

16%

And almost one in six of this working group listen at work/college

Source: JNLR 2023-2 Audio Module (Apr ’23 to Jun ’23 – 3 mth data)
Base: All 15+

Although most listening happens at home for ALL age groups, younger groups more engaged with audio outside of home compared to older cohorts.

	Audio Activity - Average Day			
	All 15+	**15-24**	**25-44**	**45+**
At home	69	63	63	**76**
Car/van	41	36	**48**	38
Work/school	11	13	**16**	7
Out walking/cycling/running	11	**23**	13	5
Bus/train	3	**11**	3	1
Someone else’s home	1	4	*	*

Source: JNLR 2023-2 Audio Module (Apr ’23 to Jun ’23 – 3 mth data)
Base: All 15+

By the way …

Almost one third (32%) of those in employment work from home at least one day per week. Almost half of working graduates work from home on 1+ days.

Source: JNLR 2023-2 Audio Module (Apr ’23 to Jun ’23 – 3 mth data)
Base: All 15+

*** JNLR survey data is a match for census ‘22 data***

The Audio Market

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89.2%

active in the audio market on average DAY

3.7 million

active listeners

97.6%

listened to audio content in past WEEK

Almost universal listening - 4.0 million

Source: JNLR 2023-2 Audio Module (Apr’23 to Jun’23 – 3 mth data)
Base: All 15+

In an innovative and growing sector, radio is the dominant form of audio listening

91.8%

listened to live radio in past week

57.4%

listened to on-demand, online audio in past week

Source: JNLR 2023-2 Audio Module (Apr’23 to Jun’23 – 3 mth data)
Base: All 15+

Radio is the dominant form of audio listening

Listening Past Week

92%	LISTEN TO LIVE RADIO
40%	LISTEN TO MUSIC STREAMING
34%	LISTEN TO YOUTUBE MUSIC
23%	LISTEN TO OWN MUSIC
22%	LISTEN TO PODCAST
7%	LISTEN BACK TO IRISH RADIO

Source: JNLR 2023-2 Audio Module (Apr ’23 to Jun ’23 – 3 mth data)
Base: All 15+

STREAMING

Listening levels to digital formats are broadly similar to 2022 patterns, There is a small resurgence in listening to our own personal music archives.

All 15+ - Listening Past Week				
	2019	2021	2022	2023
Live Radio	93%	92%	90%	92%
Music Streaming	26%	37%	40%	40%
YouTube Music	36%	36%	35%	34%
Own Music	36%	22%	18%	23%
Listen Back	6%	6%	6%	7%
Any Podcast*	9%	17%	23%	22%

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

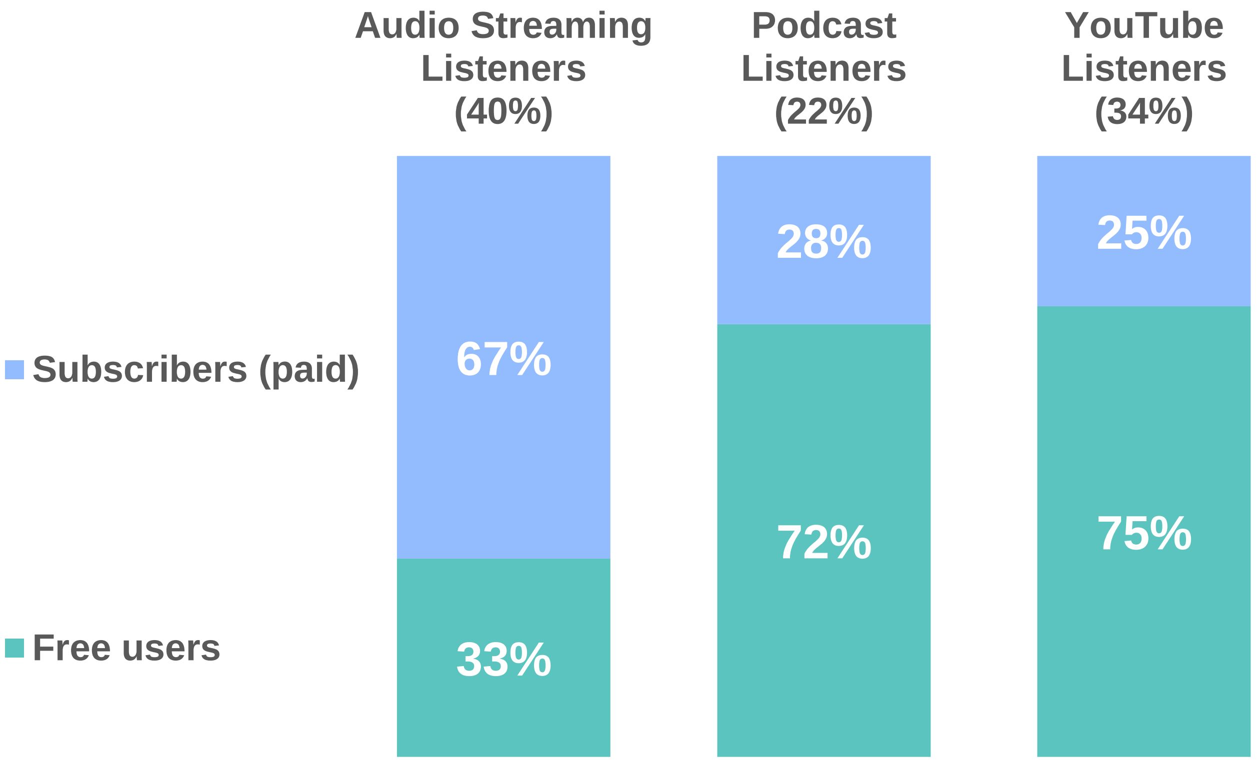
Source: JNLR 2023-2 Audio Module (Ap r'23 to Jun '23 – 3 mth data)
Base: All 15+

Listening to Audio Formats in Past Week

	15+	15-24	25-44	45-64	65+
	%	%	%	%	%
Live Radio	92	87	90	94	95
Listen Back to Irish Radio	7	9	9	8	2
Music Streaming (Spotify & Other)	40	74	52	30	6
YouTube Music	34	57	44	25	10
Own Music	23	34	25	22	14
Any Podcast	22	25	32	19	7
- Irish Podcast	15	16	23	13	6
- International Podcast	14	18	21	11	3

Source: JNLR 2023-2 Audio Module (Apr '23 to Jun '23 – 3 mth data)
Base: All 15+

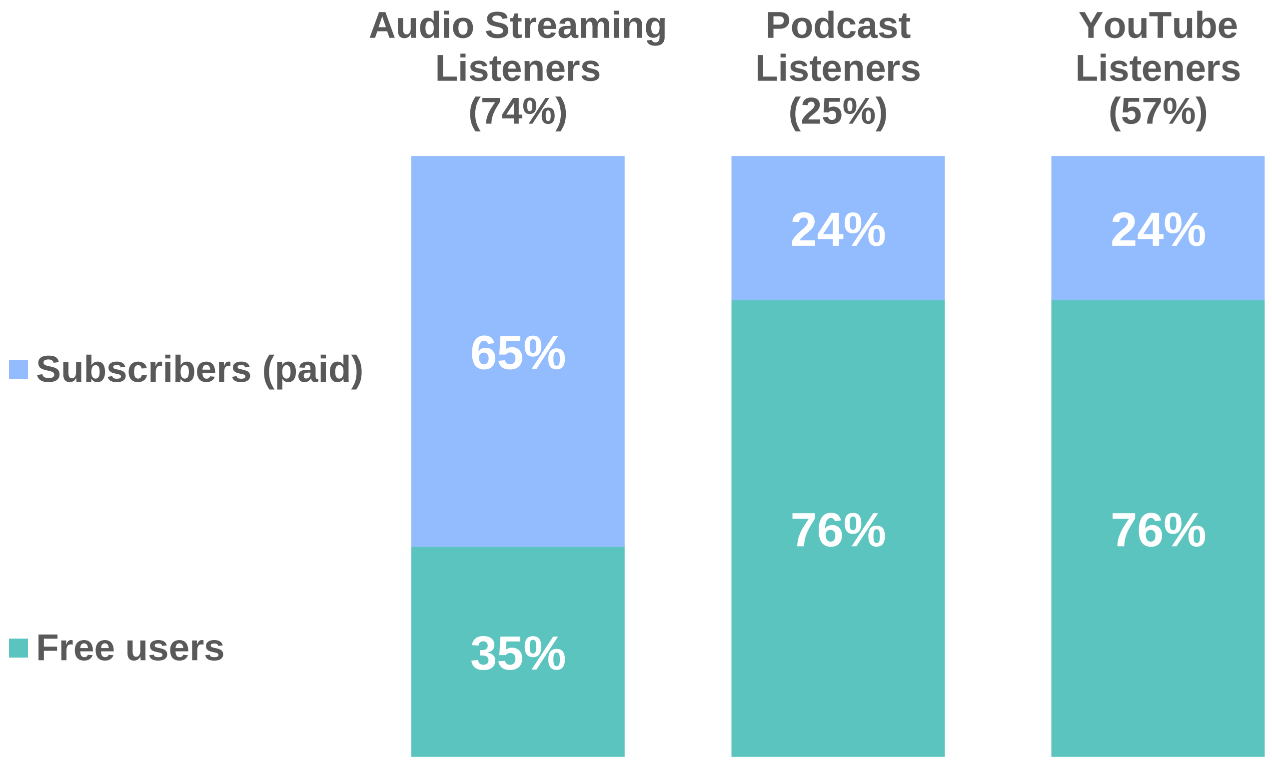
Profile Listeners Past Week



A significant proportion of audio streamers are paid up, ad-free subscribers

Source: JNLR 2023-2 Audio Module (Apr'23 to Jun'23 – 3 mth data)
Base: All format listeners

Profile Listeners 15-24's Past Week



Caution: Small sample sizes

Similar profile among 15-24's – podcast and youtube listeners mostly using free service

Source: JNLR 2023-2 Audio Module (Apr'23 to Jun'23 – 3 mth data)
Base: All format listeners

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And Now The Daily Picture

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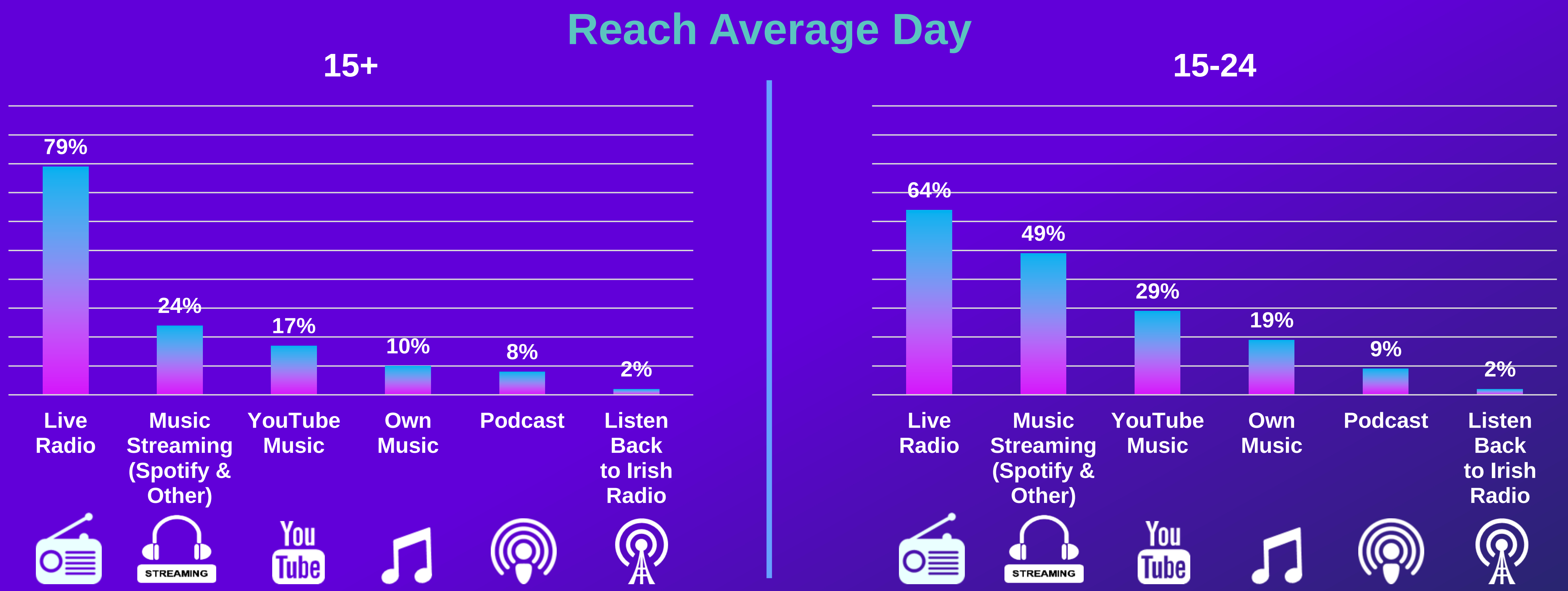
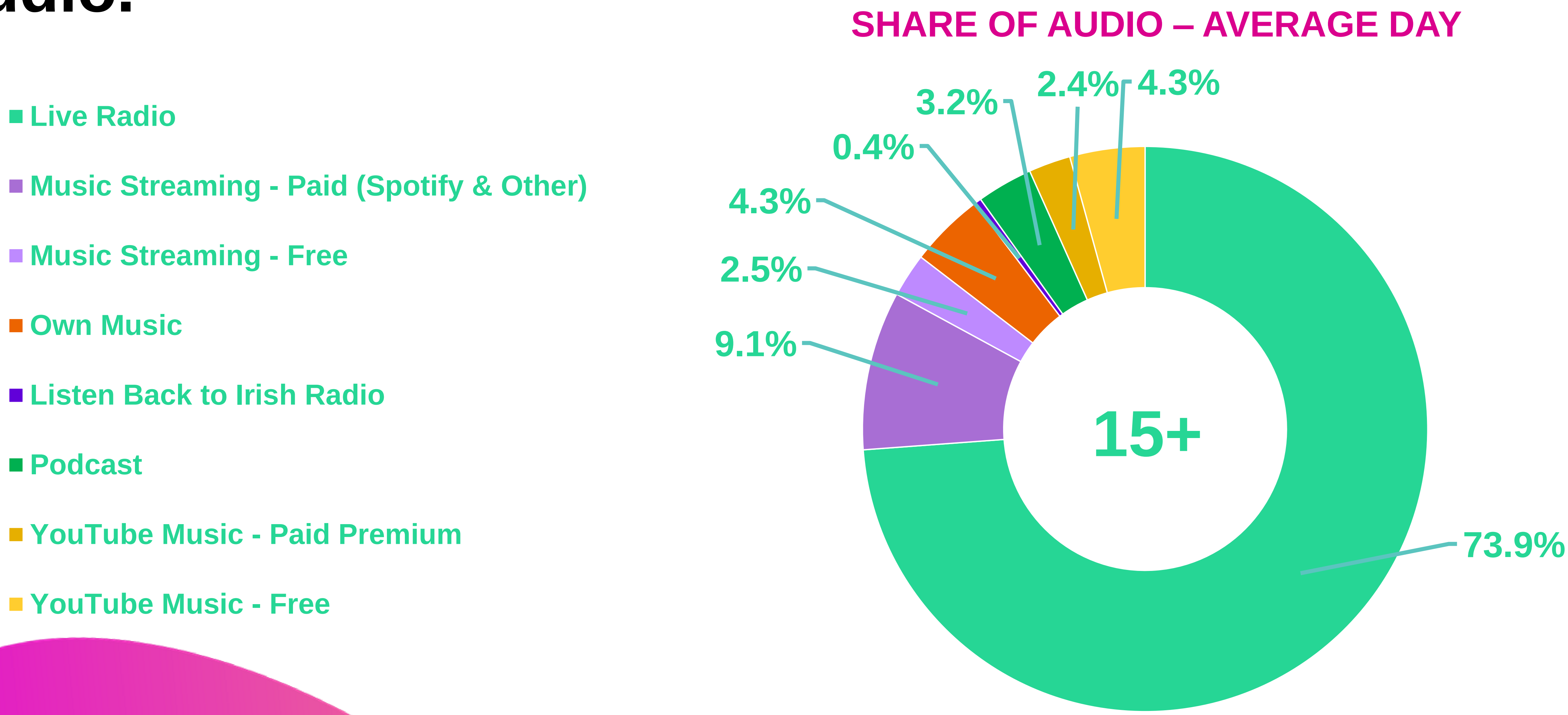
Overall, across the country, radio is the #1 choice, by a significant margin.



Source: JNLR 2023-2 Audio Module (Apr '23 to Jun '23 – 3 mth data)
Base: All 15+

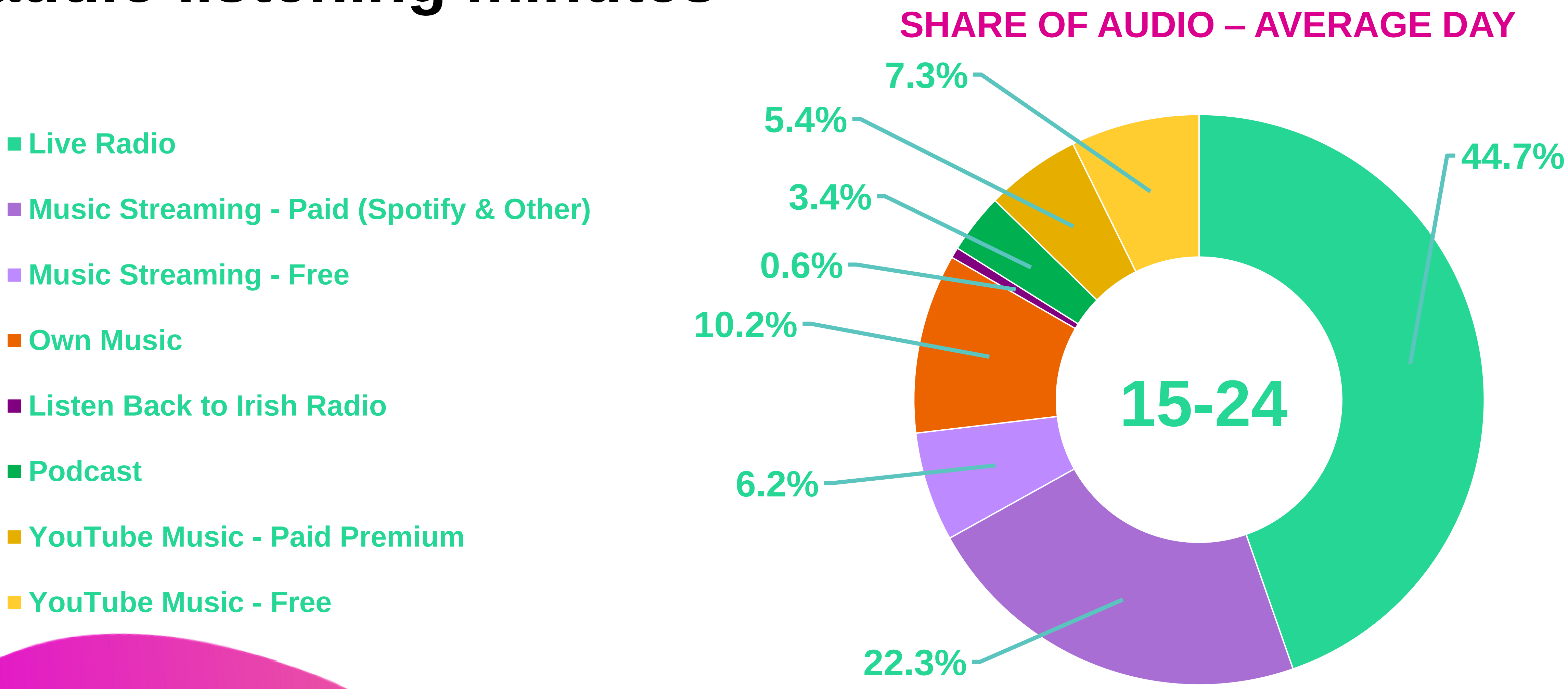
Live radio accounts for 73.9% of all time spent on audio.



**Assumes paid up subscribers to Streaming/ YouTube use premium services to listen*

Source: JNLR 2023-2 Audio Module (Apr '23 to Jun '23 – 3 mth data)
Base: All 15+

For 15-24’s, live radio has a share of 44.7% of all audio listening minutes



**Assumes paid up subscribers to Streaming/ YouTube use premium services to listen*

Source: JNLR 2023-2 Audio Module (Apr ’23 to Jun ’23 – 3 mth data)
Base: All 15+

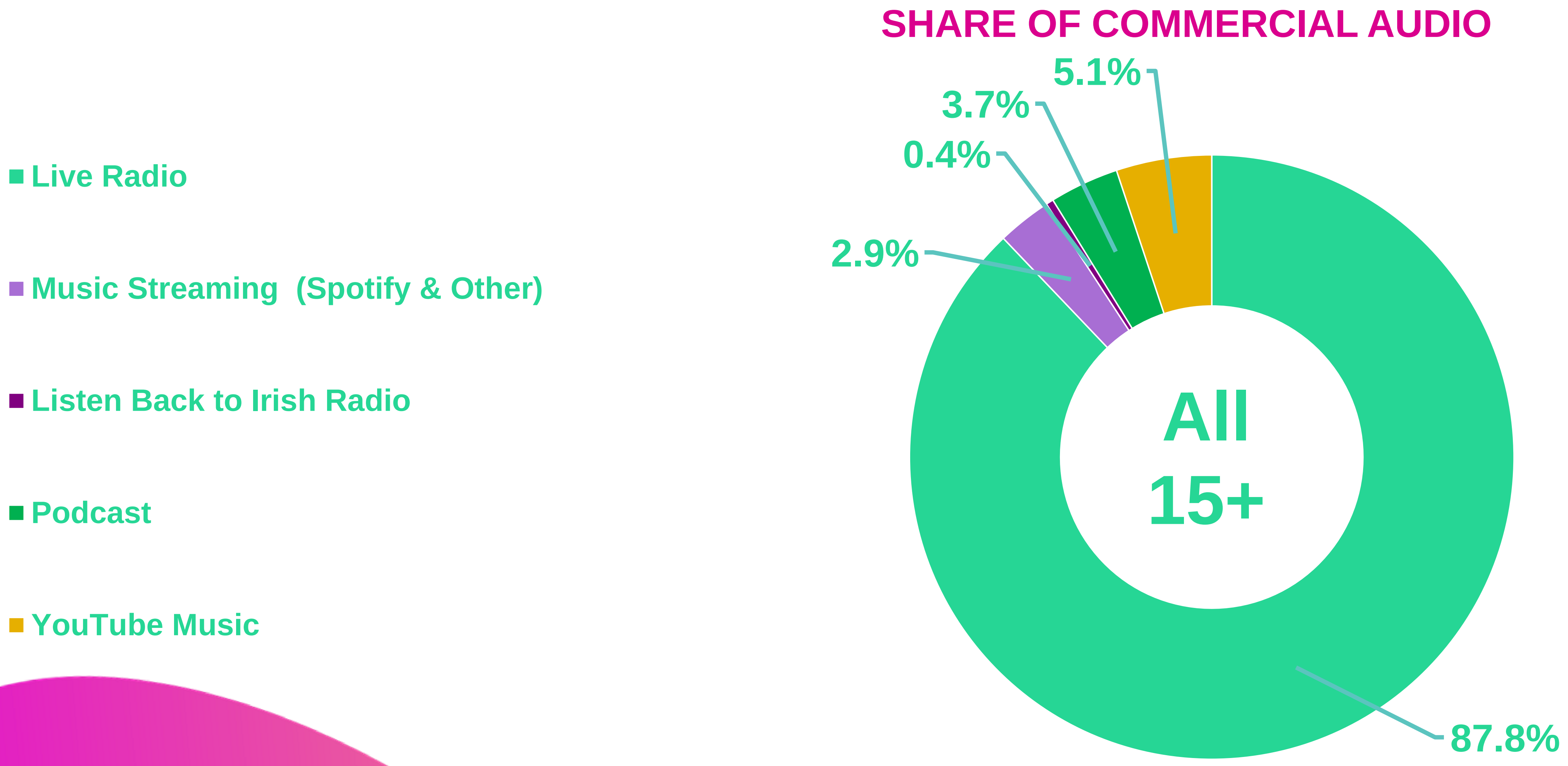
Audio – Estimated Share of Time Spent – Average Day

	15+	15-24	25-44	45-64	65+
	%	%	%	%	%
Live Radio	73.9	44.7	64.9	82.4	96.0
Listen Back to Irish Radio	0.4	0.6	0.3	0.4	0.1
Any Radio *(Live or listen back)*	74.3	45.2	65.2	82.8	96.1
Music Streaming (Spotify & Other)	11.6	28.5	15.5	6.8	0.6
YouTube Music	6.7	12.7	10.2	3.8	1.5
Own Music	4.3	10.2	4.3	3.5	1.3
Any Podcast	3.2	3.4	4.8	3.1	0.5
- Irish Podcast	1.4	0.9	2.3	1.2	0.4
- International Podcast	1.8	2.4	2.5	1.8	0.1

Share to live radio has dropped marginally overall (-0.4%) while share for other formats has re-balanced due to a small resurgence in listening to ‘own music’ and a change in patterns among the younger audience.

Source: JNLR 2023-2 Audio Module (Apr ’23 to Jun ’23 – 3 mth data)
Base: All 15+

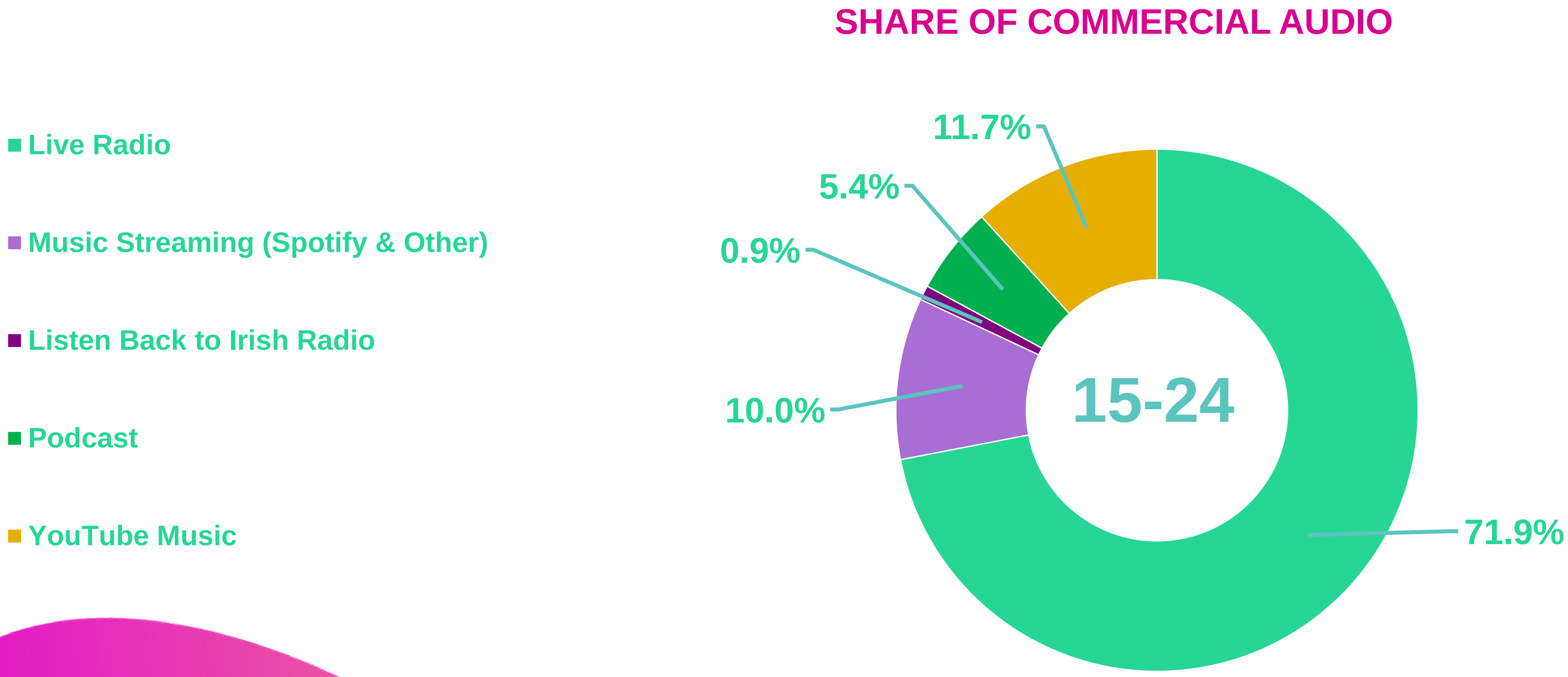
Share of 'commercial' audio for all adults



Source: JNLR 2023-2 Audio Module (Apr '23 to Jun '23 – 3 mth data)
Base: All 15+

*Assumes paid up subscribers to Streaming/ YouTube use premium services to listen

Share of ‘commercial’ audio for all 15-24’s



**Assumes paid up subscribers to Streaming/ YouTube use premium services to listen*

Source: JNLR 2023-2 Audio Module (Apr ’23 to Jun ’23 – 3 mth data)
Base: All 15+

Summary

- Between the ongoing strength of live radio and innovation within on demand audio, audio has never been in such a strong position.
- In terms of recency of listening, there is almost universal listening to audio content in the past week (97.6%) and live radio is the dominant player in this field reaching 91.8% of adults. Listening to on-demand, online audio now reaches 57.4% of the population.
- Irish audiences are connected in the digital world. Ownership of smart phones (92%) and smart speakers (45%) enables easy access to audio content at home or anywhere. The growth in ownership of smart speakers has been relatively rapid (+32% points since 2019).

Summary

- **Most listening to audio content happens in the home with seven-in-ten (69%) listening to audio at home on an average day. However, as the country moves back outside of the home, there has been some increase in listening outside the home - 41% listening in the car and 11% listening to audio while out walking/cycling/running.**
- **On an average day, in terms of time spent listening to audio, live radio has a share of 73.9% of the audio market while on-demand audio has a 26.1% share.**
- **For the younger 15-24-year-old cohort, live radio achieves the largest share of time spent, 44.7% followed by music streaming (Spotify or similar) at 28.5% and YouTube for Music with a 12.7% share.**
- **Almost two-in-five adults pay for a subscription service on one or more online platforms – either audio streaming (ad free), YouTube premium (ad free) or podcasts.**

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Thank you.

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Appendix
- Some Extras

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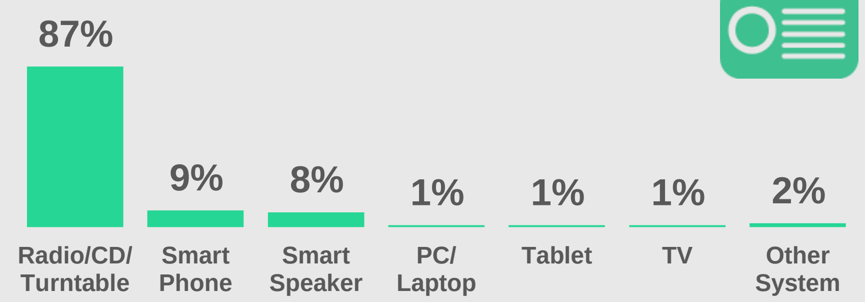
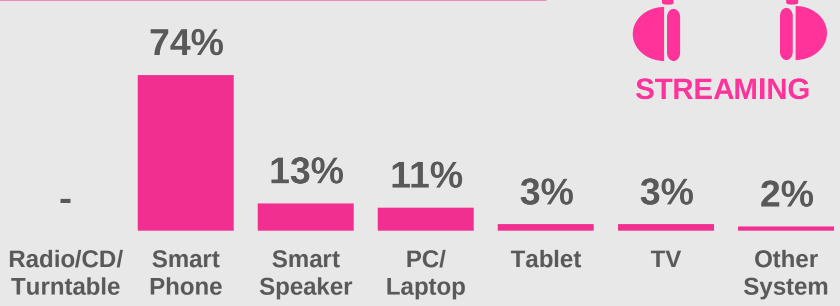
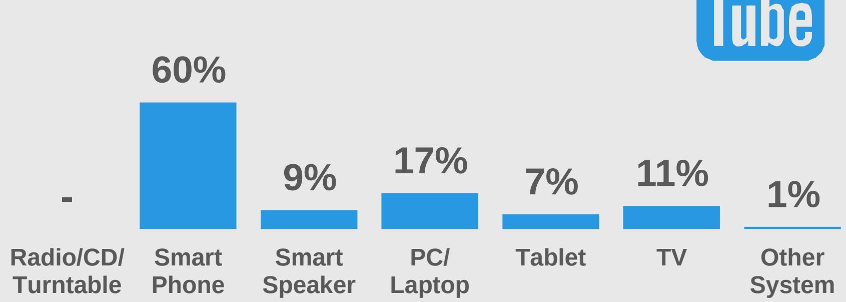
Live Radio Audience (79.3% average day)



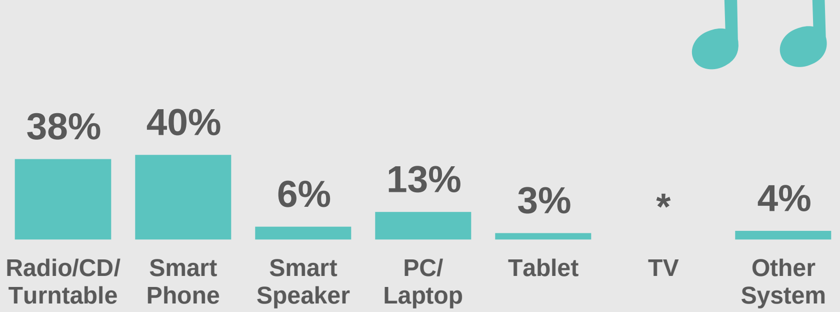
Music Streaming Audience (24.1% average day)



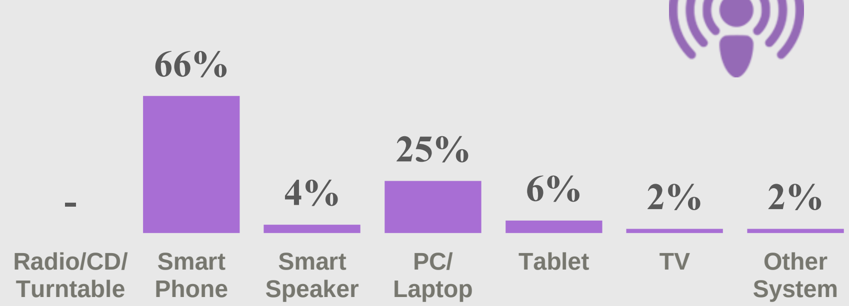
YouTube Music Audience (17.0% average day)



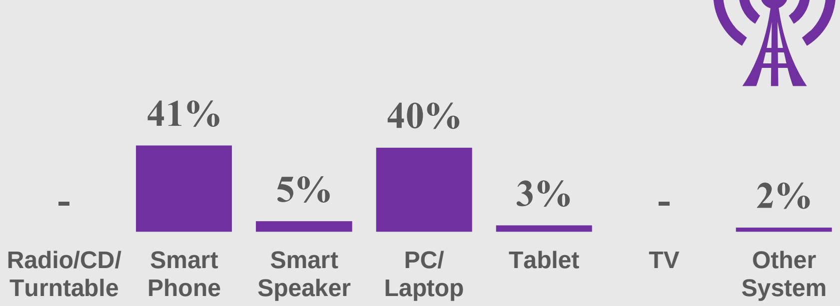
Own Music Audience (10.2% average day)



Podcast Audience (7.6% average day)



Listen Back Irish Radio Audience (1.7% average day)

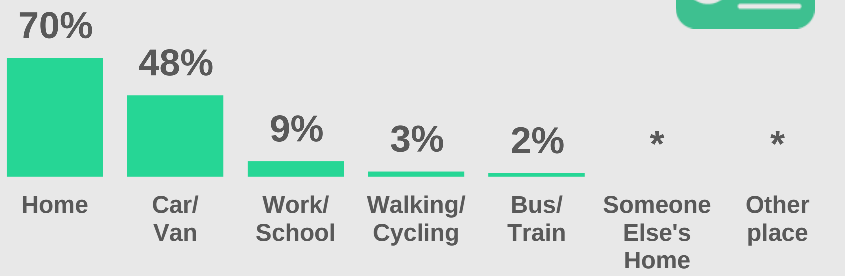


The smart phone is key device among audiences of on-demand audio

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

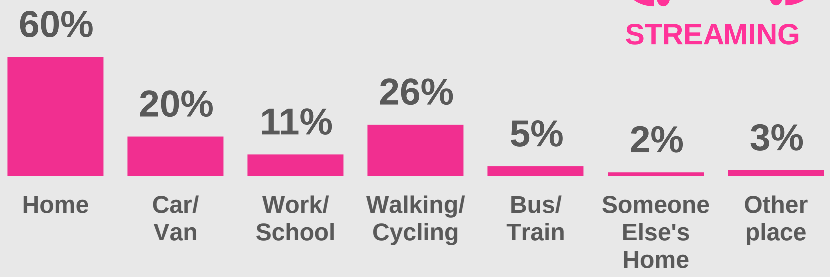
Source: JNLR 2023-2 Audio Module (Apr'23 to Jun'23 – 3 mth data)

Live Radio Audience (79.3% average day)

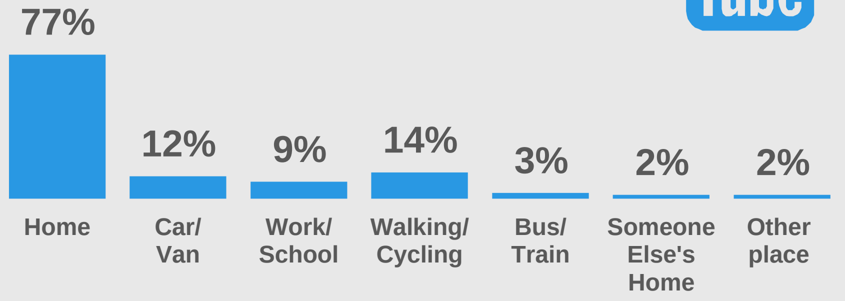


Music Streaming Audience (24.1% average day)

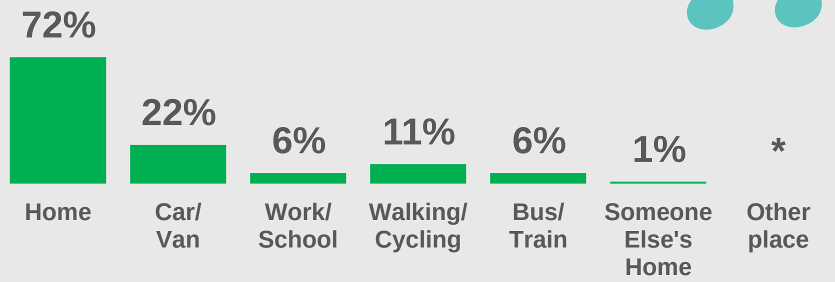
STREAMING



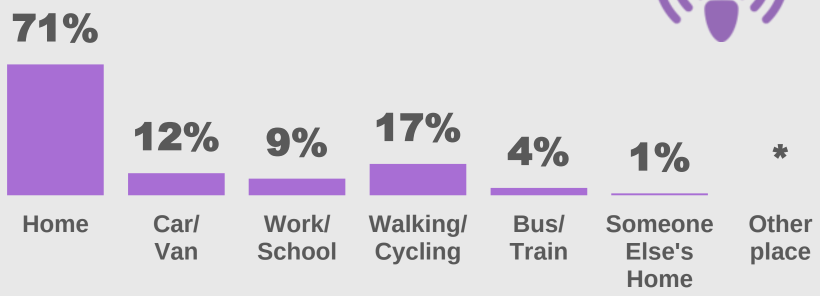
YouTube Music Audience (17.0% average day)



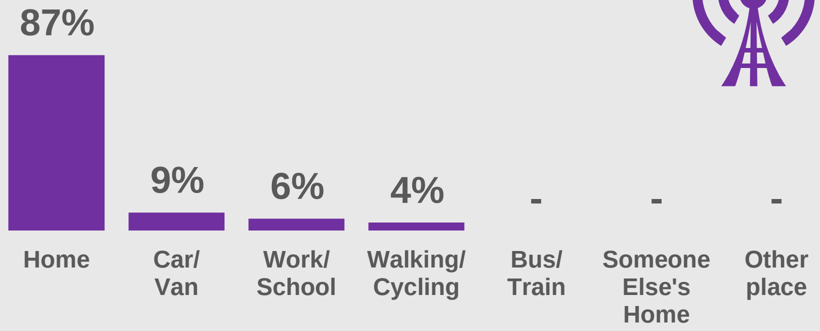
Own Music Audience (10.2% average day)



Podcast Audience (7.6% average day)



Listen Back Irish Radio Audience (1.7% average day)



Across all formats, most listening happens at home.

Live radio - the biggest format in car environment.

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

Source: JNLR 2023-2 Audio Module (Apr'23 to Jun'23 – 3 mth data)

STREAMING

Listening on smart speakers has increased marginally again this year whereas listening using other connected devices has dropped back.

Listening x Device Trend

	2021	2022	2023
Radio/CD player/Turntable	72%	67%	70%
Smart Phone	28%	34%	30%
Smart Speaker	6%	9%	10%
PC/Laptop	9%	9%	7%
Tablet	5%	5%	3%
TV	2%	3%	3%
Other System	3%	4%	3%

**Listening on Average day*

Source: JNLR 2023-2 Audio Module (Ap r'23 to Jun '23 – 3 mth data)
Base: All 15+

STREAMING

While most listening still happens at home, listening outside of the home has increased marginally suggesting more people are listening as they commute/travel about their day.

Listening x Location - Trend			
	2021	2022	2023
Home	75%	74%	69%
Car/Van	34%	39%	**41%**
Work/ School/ College	9%	11%	11%
Out Walking/Cycling/Running	8%	9%	11%
Bus/Train/Dart	1%	2%	3%
Someone Else's Home	1%	1%	1%

2021 data was collected from Oct-Nov '20 and May-June'21 (between lockdown periods)

**Listening on Average day*

Source: JNLR 2023-2 Audio Module (Ap r'23 to Jun '23 – 3 mth data)
Base: All 15+

Listening to radio - average day

7%

Listen online
- station website

7%

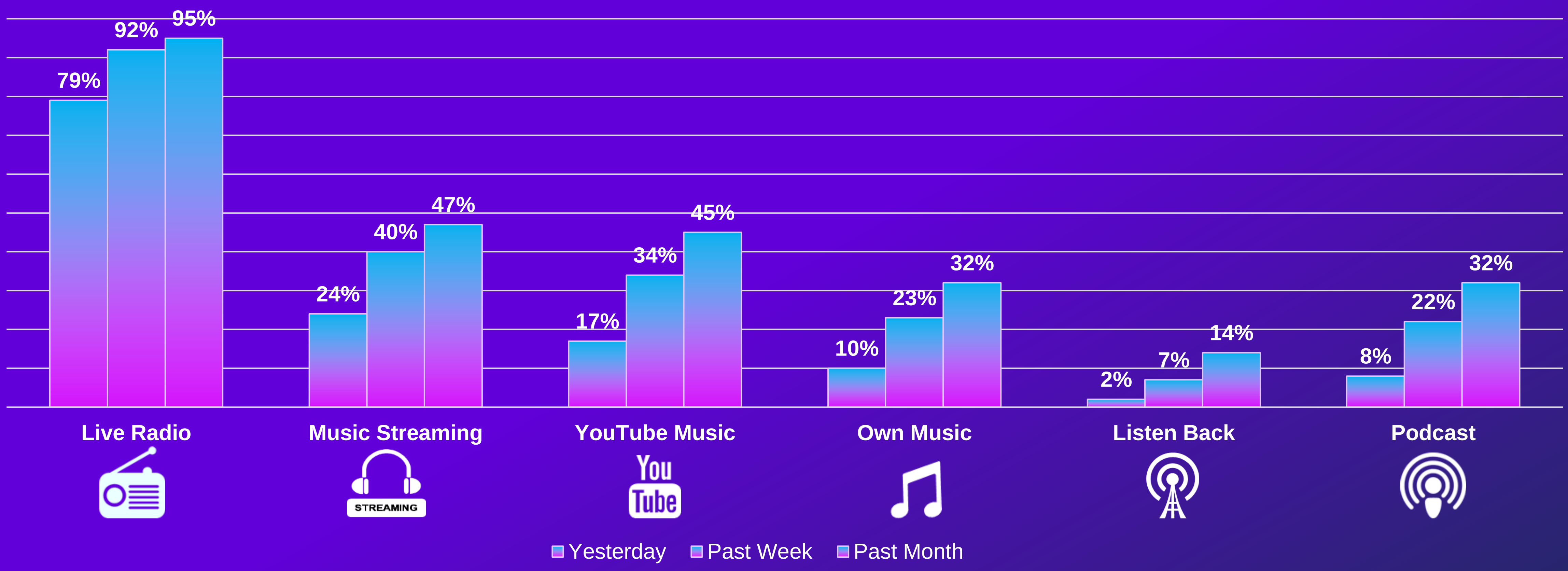
Listen online
- radio station app

3%

Listen online
- Irish radio player

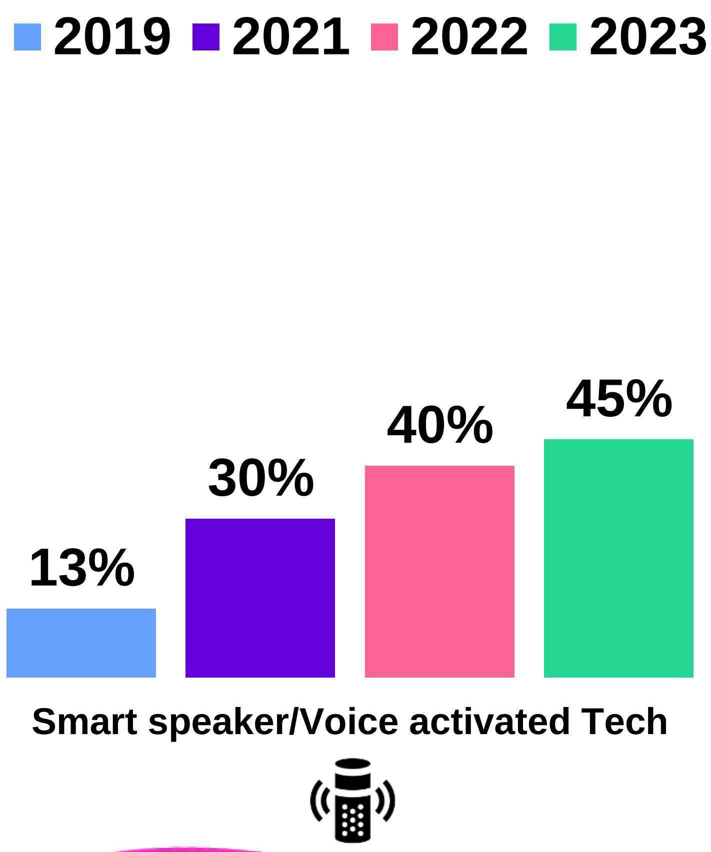
Source: JNLR 2023-2 Audio Module (Apr'23 to Jun '23 – 3 mth data)
Base: All 15+

Smaller audio formats gather additional occasional listeners on a measure of reach in the past month.



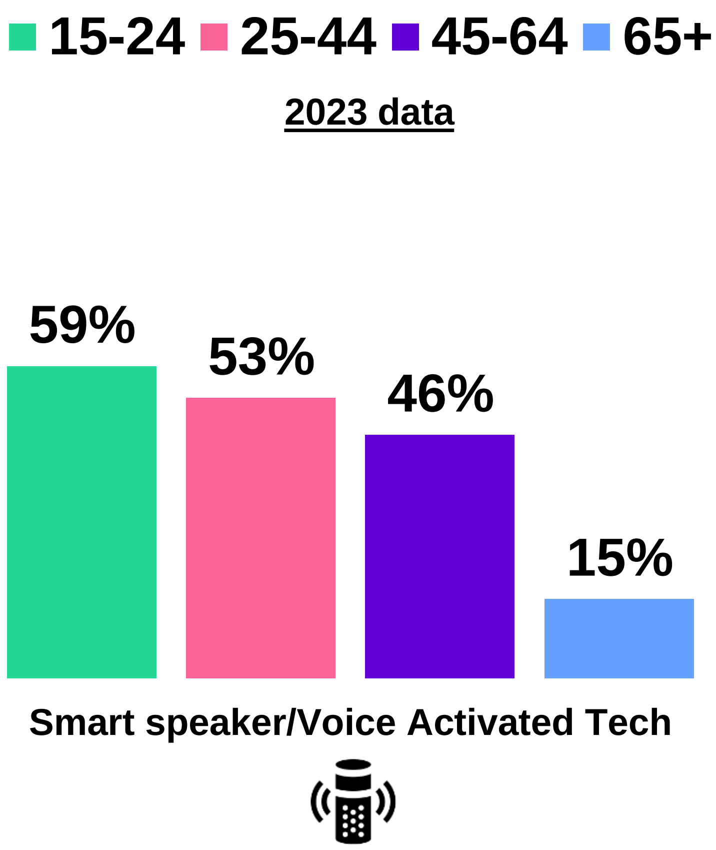
Source: JNLR 2023-2 Audio Module (Apr' 23 to Jun '23 – 3 mth data)
Base: All 15+

Ownership Of Smart Speaker



Ownership of smart speakers continues to grow.

Ownership levels higher among the younger age groups but growing across all sectors – most significant growth among 45-64's since 2021.



Source: JNLR 2023-2 Audio Module (Apr '23 to Jun'23 – 3 mth data)
Base: All 15+

Recap - Average Daily Minutes

x Head of Population

All 15+	15-24	25-44	45-64	65+
195	111	166	217	277

x Radio Listener

All 15+	15-24	25-44	45-64	65+
247	170	219	254	323

Radio engages audiences for more than 4 hours every day.

Source: JNLR 2023-2 Core Data (Jul'22 to Jun '23 – 12 mth data)
Base: All 15+

Average Daily Minutes – 7am to Midnight

Notes on Report

- **This report is sourced from JNLR data collected in Quarter 2 2023 (April to June 2023).**

- **The data in this report is based on a large national sample of 3,090 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 8-12 is based on the core interview (question 3 to 5) and key analyses presented in July 2023, based on 12-month data, (July 2022 to June 2023).**

- **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 2023. (Please refer to the footnote on each chart to confirm the research base).**

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