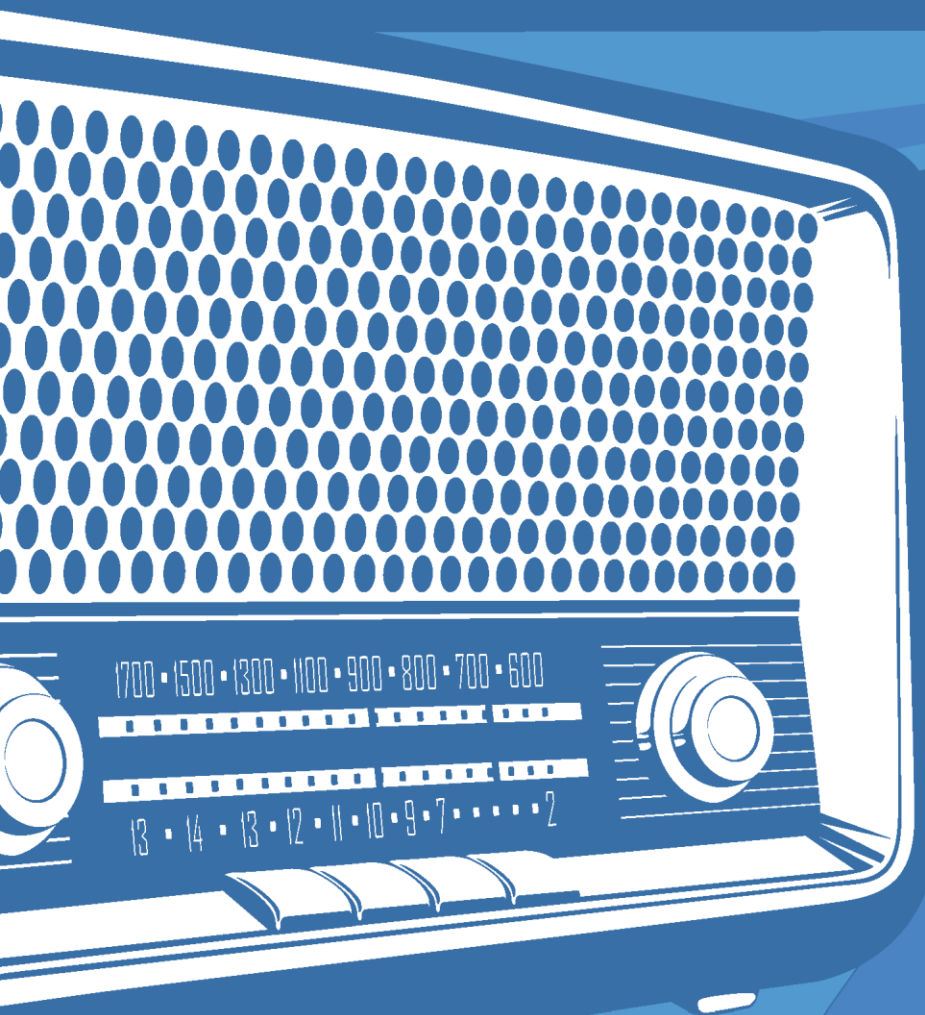


2023

JNLR Radio Listenership

Methodology Report



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1. JNLR - Joint National Listenership Research

Subscribers

- RTE
- Today FM
- Independent Broadcasters in Ireland
- Coimisiún na Meán (CnaM)
- IAPI - Institute of Advertising Practitioners in Ireland
- AAI - Association of Advertisers in Ireland Limited

Research Agency

- Ipsos B&A
- Telephone: 01-4389000
- Email: karen.hall@ipsos.com / claire.moran@ipsos.com / alex.fagan@ipsos.com / damian.loscher@ipsos.com

Data Use

- Quote source – JNLR/Ipsos B&A

Copyright: JNLR

2. JNLR - Joint National Listenership Research Committee

<i>Management Committee</i>		<i>Technical Committee</i>	
Scott Williams	Chairman	Scott Williams	Chairman
Gareth Ivory	RTE	Gareth Ivory	RTE
Anna Shutz	RTE	Eimear Murphy	IAPI
Andrew Robinson	CnaM	Karen Hall	Ipsos B&A
Chris Doyle	Today FM	Claire Moran	Ipsos B&A
Peter Smyth (IRS)	I.B.I.		
Brian McCarthy (Urban Media)	I.B.I.		
Liam Thompson (Classic Hits Radio)	I.B.I.		
Andy Macken (Media Central)	I.B.I.		
Barry Dooley	AAI		
Eimear Murphy (Core)	IAPI		

Ipsos MRBI Committee Representatives

- Damian Loscher, President – damian.loscher@ipsos.com
- Karen Hall, JNLR Account Director – karen.hall@ipsos.com
- Claire Moran, JNLR Senior Research Executive (Tech Committee)– Claire.moran@ipsos.com

3. JNLR Survey Objective

The objective of the JNLR survey is to provide reliable estimates of audiences to National, Regional and Local Radio, as a basis for the planning of advertising schedules.

A secondary objective is to provide radio audience estimates to facilitate programming analysis/planning.



4. JNLR Reports

The JNLR reports are presented on the basis of:

- 1. Week-day listening analysis
- 2. Week-end listening analysis

The report provides information for the average week-day/ week-end listening.

The reports are based on 12-month rolling data.

<i>National And Regional Report Volumes</i>	
National	South East Region
Local Area	South West Region
Dublin Region	North East & Midlands Region
Cork Region	North West Region
Multi-City Region	Dublin Commuter Region

5. Data Formats

The tabular report provides the following analyses:

- Weekly reach, past 7 days listenership
- Average week-day ('yesterday') listenership for all stations
- Share of listening by station
- Reach and Average ¼ hour Audience figures for day-parts for all stations
- Time segment (¼ hr, ½ hr, 1 hr blocks) for all stations
- Device Listenership – Reach and Share
- Past week and annual patterns of listening for all stations
- Sole and Duplicated listening, by station
- Media Consumption (included in one quarter per annum)

JNLR data is delivered in electronic format via *JNLR/My Ipsos*, a secure online internet portal – <http://info.ipsosmrbi.com/jnlr>

Sample survey techniques provide estimates which are reliable within measurable confidence limits (See pages 8-9).

6. Analyses For Publication Or For Promotional Purposes

All subscribing radio stations, IAPI Advertising Agencies & purchasers of JNLR reports have access to JNLR data subject to the following:

- Analyses of data may only be based on sub-sample sizes in excess of 200.
- No analyses of national (or regional station) ¼ hour data, at local franchise area is permitted.
- All analyses is subject to verification and correction by the JNLR Committee.
- Analyses which do not satisfy the criteria for publication are for internal use only and in the case of local stations may only refer to the data for that local station.

(See Procedures & Standards for JNLR survey on *JNLR/My Ipsos*).

Copyright of the JNLR survey data is held by JNLR.



7. Methodology

7.1. Interviewing

Interviewing is conducted face-to-face, in-home, among a sample of c.16,850 individuals aged 15+ in the Republic of Ireland.

Interviewing is conducted across 50 weeks of the year (exception week before and after Christmas).

7.2. Universe Estimates

Audience estimates emerging in the reports are presented as a percentage of the population **and** in terms of numbers of thousands of listeners.

The universe estimate is based on data provided by CSO-LFS (Labour Force Survey).



8. Sampling

The sample is representative of the population of each radio franchise area – geographically and demographically.

8.1. Geographic

The sample is designed for each individual franchise area. The number of sampling points required is distributed across the franchise area according to population. This results in a natural spread of interviews nationally. The geographic make-up of each franchise area is stratified across urbanisation criteria. This stratification forms the basis of the control of each local area sample. See example for Galway:

Region	Co. Boro	Towns 10,000+	Towns 5,000-10,000	Towns 1,500-5,000	Rural <1,500
Total	72,729		13,043	13,984	131,914
231,670	31.4%		5.6%	6.0%	56.9%
	City 72,414		Ballinasloe 6,158	Loughrea 4,532	Ballinasloe No. 1 RA 8,131
	Suburbs 315		Tuam 6,885	Athenry 3,205	Clifden RA 8,892
				Gort 2,734	Galway RA 33,515
				Oranmore 3,513	Glenamaddy RA 5,647
					Gort RA 9,806
					Loughrea RA 15,146
					Mountbellew RA 8,256
					Oughterard RA 12,392
					Portumna RA 6,242
					Tuam RA 23,887

Based on this matrix, sample points are independently selected each year. This means that the Wards/EDs selected in one year have an equal chance of emerging the next year.

Sample points are selected for one year and then distributed across the four quarters ensuring an even spread across urban and rural dimensions in each quarter.

Within each cell of the matrix sampling points represented by Wards/Eds, are randomly selected according to population.

The chosen sampling points represent the start point for a cluster of 10/11 interviews. A starting address is then selected from Geo-Directory, the Irish address database. From this starting address the interviewer follows a random route to fulfil the quota of 10/11 interviews.

Sample points are listed on *JNLR/My Ipsos* – ‘Sample’ folder.

8.2. Demographic

The population distribution by age/sex is examined for each major region of the country. Population estimates are based on data provided by the CSO Census of Population and LFS (Labour Force Survey).

Quota controls are then set for these attributes (age/sex) within each franchise area.

In local franchise areas, where the population of 15-34 year olds is likely to yield an insufficient sample for reporting purposes, a booster sample is applied – target 160 weekday interviews among 15-34 per annum. (This adjustment adopted since Q2 2011).

Social class controls are based on the distribution agreed between the research companies involved in Joint Industry Media Research – based on the Census, QNHS and TV establishment surveys.

Controls are also set for employment status – base CSO LFS.

Weighting factors are applied at analysis stage to re-align the national sample to known population estimates – hence the data becomes representative of the national population.

9. Sample Size

Sample is distributed as follows:

Area	Week-day	Week-end
Dublin	3,000	800
Cork	1,000	400
Local franchise area	480	190

Resulting in:

Area	Week-day	Week-end
Annual sample	12,160	4,430

10. Fieldwork

Interviewing is conducted by fully trained and experienced interviewers.

During the course of the survey, interviewing standards are maintained via checking of completed assignments, supervision provided by Ipsos B&A Field Management team, and through a telephone authenticity check with a min of 10% of respondents.



11. Processing of Data

Editing, coding and processing of data is handled by Ipsos B&A.

Weighting of the data is necessary to ensure that all information at franchise area level is weighted back to the correct level of representation in the national population.

JNLR data is provided to Users by Adserve, who deliver a bespoke product enabling further audience and reach & frequency analysis.

12. List Of Franchise Areas With Licenced Broadcast Station

Franchise Area	Local Station
Dublin City & County	FM 104
Dublin City & County	98fm
Dublin City & County	Dublin's Q102
Dublin City & County	Sunshine 106.8
Dublin City & County	Spin 1038
Carlow/Kilkenny	KCLR 96FM
Louth/Meath	LM FM
Co. Kildare	KFM
Laois/Offaly/Westmeath	Midlands 103/Westmeath
Co. Wexford	South East Radio
Co. Wicklow	East Coast FM
Cork City & County	Cork's 96FM
Cork City & County	Cork's C103
Cork City & County	Cork's Red 104-106FM
Limerick City & County	Limericks Live 95FM
Tipperary	Tipp FM
Waterford City & County	WLR FM
Co. Clare	Clare FM
Co. Kerry	Radio Kerry
Galway City & County	Galway Bay FM
Co. Mayo	Midwest Radio (MWR)
Roscommon/Longford/Leitrim Sth/ Cavan/Monaghan	Shannonside/Northern Sound Radio
Donegal Sth/Sligo/Leitrim Nth	Ocean FM
Donegal Nth	Highland Radio

Franchise Area	Local Station
South East Region	Beat 102-103
South West Region	Spin South West
North West Region	iRadio North West
North East & Midlands Region	iRadio North East
Multi-City Region	Classic Hits Radio
Dublin Commuter Region	Radio Nova 100FM

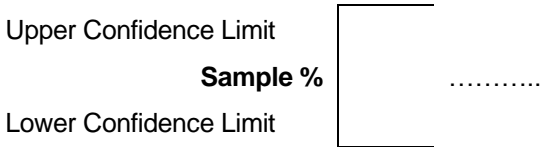
Radio Broadcast Regions	
Region	Component Counties/Franchise Areas
South East	Carlow, Kilkenny, Wexford, Waterford & Tipperary South Riding
South West	Limerick, Clare, Kerry, Tipperary North Riding & South West Laois*
North West	Galway, Mayo, Roscommon, Longford, Leitrim, Sligo & Donegal
North East	Kildare, Louth, Meath, Laois*, Offaly, Westmeath, Cavan & Monaghan
Multi-City	Full counties Dublin, Cork; Limerick; Clare and Galway and part counties Kildare, Meath and Wicklow.
Dublin Commuter	Dublin and part counties Kildare, Meath and Wicklow.

13. Confidence Interval

CONFIDENCE LIMITS – MEANING

In sample survey findings the percentages emerging are statistically reliable **estimates** of the true percentages which would emerge if the total population had been interviewed.

Because the percentages emerging are **estimates**, it is necessary to build a confidence interval, above and below the estimate, within which one can be 95% confident that the true value would lie (the true value being that percentage which would be found if every adult in the country was interviewed).



CALCULATION

The confidence interval relating to any percentage emerging from a simple random sample can be calculated using the following formula:

$$+ 2 \times \sqrt{\frac{p(100-p)}{n}}$$

where p = the percentage under consideration
and n = the sample or sub-sample size

This formula is further modified when the sample is not a simple random sample, but is drawn in a number of stages. This further modification involves multiplying the above formula by approximately 1.25.

Example

If a radio station emerges with 22% listenership the confidence interval would be:

$$22\% + (1.25) \quad 2 \times \sqrt{\frac{22 \times 78}{11,100}}$$

- i.e. 22% + .98
- i.e. the true percentage would lie within the range 21% to 23%.

NOTE: Special care should be taken in the interpretation and use of percentages based on small sub-samples.

CONFIDENCE INTERVAL – EXAMPLES

		CONFIDENCE INTERVAL READY RECKONER @ 95% CONFIDENCE LEVEL								
		Sub-Sample Size								
Audience Est.		200	300	400	500	800	1,000	1,500	2,000	3,000
10%	±	5.3	4.3	3.75	3.4	2.7	2.4	1.9	1.7	1.4
20%	±	7.1	5.8	5.0	4.5	3.5	3.2	2.6	2.2	1.8
30%	±	8.1	6.6	5.7	5.1	4.1	3.6	3.0	2.6	2.1
40%	±	8.7	7.1	6.1	5.5	4.3	3.9	3.2	2.7	2.2
50%	±	8.8	7.2	6.25	5.6	4.4	4.0	3.2	2.8	2.3
60%	±	8.7	7.1	6.1	5.5	4.3	3.9	3.2	2.7	2.2
70%	±	8.1	6.6	5.7	5.1	4.1	3.6	3.0	2.6	2.1
80%	±	7.1	5.8	5.0	4.5	3.5	3.2	2.6	2.2	1.8
90%	±	5.3	4.3	3.75	3.4	2.7	2.4	1.9	1.7	1.4

14. Terms & Definitions Used In The Reports

REACH (Average Weekday Yesterday Listenership)

- Reach is about PEOPLE.
- The size of audience “reached” by radio in general (Any Radio) or by a specific station. This question measures the number of people who have an “opportunity to hear” an ad on a radio station.
- Reach can also be described as = the number of people who listened/tuned into a station yesterday (average day). It doesn’t matter if they tuned in for 2 minutes or for 2 hours – everyone who listened is counted here.
- Remember: Yesterday = Average Day

WEEKLY REACH

- Weekly reach is the sum of “yesterday listening” plus “past week listening”. (It is not based on the sum of 7 days listening as our methodology is not diary based).

MARKET SHARE (Minutes Listened).

- Share is about MINUTES – it measures a station’s share of all minutes listened to Irish Commercial Radio.
- If, for example, a respondent listened to two ¼ hour periods, this is calculated as 30 minutes. Each respondent’s listening activity is calculated and added together in this manner, resulting in a TOTAL number of minutes listened per day.

- Station share is then calculated based on the number of minutes listened to Station A vs. Station B. The market share table therefore will always add up to 100%.
- The share analysis is broken out into 3 time periods – share of minutes listened 7am-7pm, 7pm-midnight, and 7am-midnight.
- Market share is a better measure of loyalty as it shows the depth of listening to a station.

PROGRAMME TIME-BLOCK LISTENING

- The programme time-block analysis is a reach figure for each individual programme. It shows the level of audience who tuned into the station at some time during the particular programme block.
- It doesn’t matter if they listened to only 1 qtr hr of the block, or to 4 qtr hrs – everyone who listened to at least 8 minutes in that time block is included on an equal basis here.
- Average audience (av. ¼ hour audience) – this measures the size of the average ¼ hour audience for the time block.

TIME SEGMENT LISTENERSHIP / ¼ HOUR LISTENING

- This is a measure of the audience reach /number of people who tuned into a station for each individual quarter hour.

TABLES

Universe Estimates:	the sample represented by actual population estimates in 000's.
Unweighted Total/Sample Size:	please use caution where sample size is small.

AUDIENCES

Shopper:	defined as a person (male or female) who does the main grocery shopping for a household.
Shopper with dependents:	as above, but residing in a household where there are dependent children or young adults (any age)
Married/Widowed:	includes those who are separated, divorced or living as married.
Social Class:	the social class of respondents is based on the occupation of the Head of Household/Chief Income Earner. Where that person is retired, unemployed or widowed, social class is based on former occupation.
Working Women:	defined as all women who are working 30 plus hours per week in a paid job.
Farmers:	defined as the person who has sole or joint responsibility for running the farm.

For other useful information go to *JNLR/My MRBI – User Information* - <http://info.ipsosmrbi.com/jnlr>

The screenshot shows the JNLR My MRBI Portal website. The header includes the JNLR logo (Joint National Listenership Research) and the Ipsos logo. A navigation bar contains links for HOME, METHODOLOGY, EVENTS CALENDAR, and CONTACTS. The main content area is titled "WELCOME TO JNLR'S MYMRBI PORTAL" and contains the following text:

JNLR (Joint National Listenership Research) is a joint industry research project conducted on behalf of the Irish radio industry. JNLR is commissioned and controlled by the JNLR Management Committee with representation from RTE, Today FM, Independent Broadcasters of Ireland, BAI (Broadcasting Authority of Ireland) and the Advertising Industry.

The primary objective of the JNLR survey is to provide reliable estimates of audiences to National, Regional and Local Radio, as a basis for the planning of advertising schedules. The secondary objective is to provide radio audience estimates to facilitate programming analysis/planning.

The JNLR data is presented in two parts - (i) week-day listening patterns and (ii) week-end listening patterns. All data is archived on this portal ([see 'Sectors' to refine your search by region](#)).

[Click here for access to the JNLR reports](#)

The "What's New" sidebar on the right highlights recent publications and press releases:

- JNLR PUBLICATION**: The 2023-4 report for JNLR is available now. [Read More](#)
- JNLR PRESS RELEASE**: The JNLR 2023-4 Press Release is available here now. [Read More](#)
- RADIO AND THE IRISH AUDIO MARKET - 2023**: Report available here now. Click Read More below. [Read More](#)