

JNLR Press Release

July 2012



Ipsos MRBI/JNLR 2012/2 Summary Results

The latest JNLR/Ipsos MRBI report into radio listening is published today (26th July, 2012). It covers the 12-month period from July 2011 to June 2012.

The latest results show **daily radio listening at 85%** - that is 85% of all adults listening every weekday.

A total of c15,600 people were interviewed during the survey period by Ipsos MRBI, on behalf of JNLR - Joint National Listenership Research - that is funded by all national, regional and local stations, BAI, AAI, and IAPI.

The following tables are the key top line results from the 'week-day' report for the main radio stations at National level, within Dublin and Cork counties, and the South East, South West, North West, North East/Midlands, Multi-city and Dublin Commuter regions. (See p.11).

While Tables 1-4 show the proportion of adults tuning into the stations at some time during the day, the depth of listening or loyalty to various stations is best reflected in the share of listening achieved by each station, as shown in Tables 5-8, whilst Table 9 provides information on the Local Stations in each licensed franchise area.

85% of Irish adults listen to the radio on an average day - 58% (-1) tuning into their local or regional station and 47% (=) listening to a national station. Among the younger 15-34 year market, 81% listen daily.

Irish audiences continue to listen to a significant amount of radio everyday – tuning in, on average, for almost 4 hours per day during the prime 7am to 7pm time (*Irish Adults listening Mon-Fri*). In terms of share of all minutes listened, national radio has 47.6% share of all minutes (*plus 0.4%*) while local/regional radio holds the majority share position with 52.4%.

Considering the various regions throughout the country, national radio holds the majority share position in Dublin (55.9%), the Dublin Commuter belt (57.0%), the Multi-city areas (51.5%) and the North East/Mid region (51.8%) while local/regional radio is in the majority in the other regions throughout the country, in particular achieving it's highest position in the North West region (60.9%). (See T5).

Among the younger, 15-34 year old audience across the country, local/regional radio holds the national majority share position at 63.6% (+0.7%) versus 36.4% for national radio. In particular, the local/regional group holds a strong share position among this age segment in Dublin, 74.1%; Cork, 64.2%; the Multi-city region, 66.7% and the Dublin Commuter region, 70.9%. (See T7).

Looking at the 35+ age segment, national radio holds the majority share, 52.0% (+0.7%). In regional markets, national radio maintains a strong share position in Dublin, 69.6%, the Dublin Commuter region, 69.1% and in the Multi-city area, 59.3%. (See T8).

Local radio continues to be a strong performer in the individual radio markets across the country – in many areas reaching more than 40% of the local adult population daily. In Mayo, the Shannonside area and Donegal Nth, more than 50% of the adult population tune in daily. In particular, on the criterion of share of minutes listened during prime 7am to 7pm, Highland Radio, Tipp FM, Radio Kerry and MWR hold the majority share position in their franchise areas. (T9).

The population estimates in this report are based on data provided by the CSO - Census 2011 statistics. (*Estimates between Census years are provided by CSO and are based on the Quarterly National Household Survey.*)

(See pg 11 for definition of radio broadcast regions).

All Adults Aged 15+

Table 1: Average Weekday Yesterday Listenership

	NATIONAL		CO. DUBLIN		CO. CORK		SOUTH EAST		SOUTH WEST		NORTH WEST		NORTH EAST & MID		MULTI-CITY		DUBLIN COMMUTER	
	Weekdays (change from Apr '11-Mar '12)		Weekdays (change from Apr '11-Mar '12)		Weekdays (change from Apr '11-Mar '12)		Weekdays (change from Apr '11-Mar '12)		Weekdays (change from Apr '11-Mar '12)		Weekdays (change from Apr '11-Mar '12)		Weekdays (change from Apr '11-Mar '12)		Weekdays (change from Apr '11-Mar '12)		Weekdays (change from Apr '11-Mar '12)	
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Listened at all *	85	(+0)	82	(-1)	86	(+1)	84	(+0)	89	(+2)	90	(+0)	83	(+1)	84	(-1)	82	(-2)
Any National	47	(+0)	46	(-1)	50	(+1)	44	(-1)	47	(+2)	48	(+1)	48	(+2)	49	(+1)	47	(-1)
Any RTE Radio	35	(+0)	36	(+0)	37	(+1)	31	(-2)	33	(+1)	36	(+0)	35	(+1)	37	(+0)	37	(+0)
Any RTE Radio 1/ RTÉ 2FM /RTE Lyric FM	35	(+0)	36	(+0)	37	(+1)	31	(-2)	33	(+1)	35	(+2)	35	(+1)	37	(+1)	37	(+0)
RTÉ Radio 1	25	(+0)	29	(-1)	27	(-1)	21	(-1)	20	(+0)	23	(+1)	22	(+0)	28	(+0)	29	(-1)
RTÉ 2FM	11	(+0)	7	(-1)	11	(+1)	12	(+0)	14	(+1)	13	(+1)	14	(-1)	10	(+0)	8	(-1)
RTÉ Lyric FM	4	(+0)	6	(+0)	5	(+0)	3	(+0)	2	(+1)	3	(+0)	2	(+0)	5	(+0)	6	(+1)
Today FM	14	(+0)	8	(-1)	16	(+0)	17	(+1)	17	(+2)	17	(+1)	15	(+0)	13	(+0)	10	(+0)
Newstalk	8	(+0)	12	(-1)	9	(-1)	6	(+0)	6	(+0)	7	(+0)	6	(+0)	10	(-1)	12	(+0)
Any Regional/Local/M-City/D-C#	58	(-1)	49	(-2)	65	(+1)	60	(-2)	66	(+1)	71	(+0)	52	(-1)	55	(-1)	49	(-2)
Classic Hits 4FM			2	(+0)	7	(+0)									4	(+1)	2	(+0)
Radio Nova			5	(+0)													5	(+0)
Beat 102-103							22	(+0)										
Spin South West									21	(+1)								
i102-104											20	(+0)						
i105-107													11	(+1)				
98FM			11	(-2)														
FM104			21	(+0)														
Q102			10	(-1)														
Sunshine 106.8			3	(-1)														
Spin 1038			16	(+1)														
Phantom 105.2			2	(+0)														
Corks 96FM/C103					48	(+0)												
Corks 96FM					35	(+0)												
C103 (Corks 103FM)					16	(-1)												
Corks Red FM					20	(+1)												

* Indicates the proportion tuning to the station at some time on the day.

Any regional/local/M-City/D-C includes any audience to Beat 102-103, Spin Sth West, i102-104, i105-107, Classic Hits 4FM & Radio Nova.

Adults Aged 15-24

Table 2: Average Weekday Yesterday Listenership

	NATIONAL	CO. DUBLIN	CO. CORK	SOUTH EAST	SOUTH WEST	NORTH WEST	NORTH EAST & MID	MULTI-CITY	DUBLIN COMMUTER
	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %
Listened at all *	80	75	83	78	87	85	80	79	76
Any National	23	13	28	27	28	30	22	21	13
Any RTE Radio	14	8	16	16	15	22	15	12	8
Any RTE Radio 1/ RTÉ 2FM /RTE Lyric FM	14	8	16	16	15	21	15	12	8
RTE Radio 1	5	5	6	2	1	6	5	6	5
RTE 2FM	10	2	11	13	14	16	10	7	2
RTE Lyric FM	1	1	2	2	0	0	0	1	0
Today FM	10	4	13	14	17	14	8	9	5
Newstalk	2	3	3	1	2	2	2	2	3
Any Regional/Local/M-City/D-C#	71	68	76	66	74	77	69	71	69
Classic Hits 4FM		1	5						
Radio Nova		5							
Beat 102-103				57					
Spin South West					68				
i102-104						61			
i105-107							35		
98FM		8							
FM104		34							
Q102		11							
Sunshine 106.8		0							
Spin 1038		46							
Phantom 105.2		2							
Corks 96FM/C103			39						
Cork's 96FM			33						
C103 (Corks 103 FM)			8						
Corks Red FM			50						

* Indicates the proportion tuning to the station at some time on the day.

Any regional/local/M-City/D-C includes any audience to Beat 102-103, Spin Sth West, i102-104, i105-107, Classic Hits 4FM & Radio Nova.

Adults Aged 15-34

Table 3: Average Weekday Yesterday Listenership

	NATIONAL	CO. DUBLIN	CO. CORK	SOUTH EAST	SOUTH WEST	NORTH WEST	NORTH EAST & MID	MULTI-CITY	DUBLIN COMMUTER
	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %
Listened at all *	81	78	84	79	86	86	78	81	78
Any National	35	24	42	40	42	43	35	32	25
Any RTE Radio	20	15	22	22	22	26	20	18	15
Any RTE Radio 1/ RTÉ 2FM /RTE Lyric FM	20	14	22	22	22	25	20	18	15
RTE Radio 1	8	8	9	6	4	9	7	8	8
RTE 2FM	13	6	14	16	19	18	14	10	6
RTE Lyric FM	2	3	2	2	1	1	1	2	3
Today FM	18	9	23	23	25	23	18	16	10
Newstalk	6	7	9	4	6	6	5	7	7
Any Regional/Local/M-City/D-C#	63	64	68	57	64	70	57	65	64
Classic Hits 4FM		1	6					3	1
Radio Nova		7							7
Beat 102-103				43					
Spin South West					47				
i102-104						46			
i105-107							24		
98FM		14							
FM104		31							
Q102		11							
Sunshine 106.8		1							
Spin 1038		31							
Phantom 105.2		3							
Corks 96FM/C103			38						
Corks 96FM			32						
C103 (Corks 103FM)			8						
Corks Red FM			39						

* Indicates the proportion tuning to the station at some time on the day.

Any regional/local/M-City/D-C includes any audience to Beat 102-103, Spin Sth West, i102-104, i105-107, Classic Hits 4FM & Radio Nova.

Adults Aged 35+

Table 4: Average Weekday Yesterday Listenership

	NATIONAL	CO. DUBLIN	CO. CORK	SOUTH EAST	SOUTH WEST	NORTH WEST	NORTH EAST & MID	MULTI-CITY	DUBLIN COMMUTER
	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %
Listened at all *	87	84	87	87	90	92	85	87	85
Any National	54	61	54	47	49	51	55	59	63
Any RTE Radio	44	51	46	36	39	41	44	49	52
Any RTE Radio 1/ RTÉ 2FM /RTE Lyric FM	44	51	46	36	38	40	44	49	52
RTE Radio 1	35	43	37	29	29	31	31	40	43
RTE 2FM	11	8	9	10	11	10	15	10	10
RTE Lyric FM	5	9	8	4	2	4	3	7	8
Today FM	12	8	12	14	12	13	14	11	9
Newstalk	10	15	9	7	7	7	7	12	15
Any Regional/Local/M-City/D-C#	55	38	63	62	66	72	50	49	39
Classic Hits 4FM		3	8					4	3
Radio Nova		4							4
Beat 102-103				10					
Spin South West					7				
i102-104						6			
i105-107							3		
98FM		9							
FM104		14							
Q102		10							
Sunshine 106.8		5							
Spin 1038		5							
Phantom 105.2		1							
Cork's 96FM/C103			55						
Cork's 96FM			38						
C103 (Corks 103FM)			21						
Corks Red FM			8						

* Indicates the proportion tuning to the station at some time on the day.

Any regional/local/M-City/D-C includes any audience to Beat 102-103, Spin Sth West, i102-104, i105-107, Classic Hits 4FM & Radio Nova.



All Adults Aged 15+

Table 5: Share of Listening (7am – 7pm)

	NATIONAL		CO. DUBLIN		CO. CORK		SOUTH EAST		SOUTH WEST		NORTH WEST		NORTH EAST & MID		MULTI-CITY		DUBLIN COMMUTER	
	Weekdays (change from Apr'11-Mar'12)		Weekdays (change from Apr'11-Mar'12)		Weekdays (change from Apr'11-Mar'12)		Weekdays (change from Apr'11-Mar'12)		Weekdays (change from Apr'11-Mar'12)		Weekdays (change from Apr'11-Mar'12)		Weekdays (change from Apr'11-Mar'12)		Weekdays (change from Apr'11-Mar'12)		Weekdays (change from Apr'11-Mar'12)	
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Any National	47.6	(+4)	55.9	(+2)	43.2	(-6)	44.6	(+1.2)	40.3	(+6)	39.1	(-1)	51.8	(+1.1)	51.5	(-2)	57.0	(+5)
Any RTE Radio	33.0	(+2)	42.1	(+1.1)	29.9	(+1.1)	28.2	(+2)	25.7	(-9)	24.7	(-6)	36.5	(+5)	36.5	(+2)	42.3	(+1.0)
RTÉ Radio 1	23.0	(+1)	32.3	(+3)	22.6	(+1.0)	18.4	(-8)	15.9	(-1.8)	15.5	(+3)	23.3	(+8)	26.7	(+1)	32.0	(+4)
RTÉ 2FM	7.7	(+2)	6.0	(+5)	5.2	(+1)	8.3	(+9)	8.5	(+7)	6.8	(-3)	12.0	(-3)	6.6	(+1)	6.6	(+3)
RTÉ Lyric FM	1.9	(+1)	3.4	(+2)	2.0	(+1)	1.2	(-2)	1.2	(+3)	.9	(+1)	1.2	(+0)	2.6	(+2)	3.3	(+2)
Today FM	9.9	(+2)	6.3	(-6)	9.4	(-1.0)	13.7	(+1.0)	11.3	(+1.3)	11.0	(+5)	11.4	(+6)	9.3	(+0)	7.5	(-4)
Newstalk	4.6	(-2)	7.5	(-3)	3.9	(-6)	2.7	(+0)	3.3	(+3)	3.3	(-1)	3.9	(+0)	5.8	(-3)	7.2	(-1)
Any Regional/Local/M-City/D-C#	52.4	(-4)	44.1	(-2)	56.8	(+6)	55.4	(-1.2)	59.7	(-6)	60.9	(+1)	48.2	(-1.1)	48.5	(+2)	43.0	(-5)
Classic Hits 4FM			1.4	(+2)	4.2	(+5)									2.4	(+3)	1.2	(+1)
Radio Nova			3.1	(-2)													3.1	(-3)
Beat 102-103							11.6	(-4)										
Spin South West									11.0	(+1)								
i102-104											11.4	(-1)						
i105-107													7.6	(+9)				
98FM			7.7	(-1.0)														
FM104			12.2	(+8)														
Q102			8.3	(-9)														
Sunshine 106.8			2.3	(-1)														
Spin 1038			7.7	(+9)														
Phantom 105.2			.7	(-1)														
Corks 96FM/C103					40.0	(+0)												
Corks 96FM					27.9	(+7)												
C103 (Corks 103FM)					12.1	(-6)												
Corks Red FM					10.6	(+0)												
Mean No. of Minutes	237	(+1)	230	(+0)	293	(+14)	209	(-2)	232	(+1)	245	(-3)	226	(+1)	242	(+3)	231	(+0)

Any regional/local/M-City/D-C includes any audience to Beat 102-103, Spin Sth West, i102-104, i105-107, Classic Hits 4FM & Radio Nova.



Adults Aged 15-24

Table 6: Share Of Listening (7am – 7pm)

	NATIONAL	CO. DUBLIN	CO. CORK	SOUTH EAST	SOUTH WEST	NORTH WEST	NORTH EAST & MID	MULTI-CITY	DUBLIN COMMUTER
	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %
Any National	25.1	15.7	24.7	32.7	27.9	28.1	28.8	22.3	17.7
Any RTE Radio	13.6	8.3	14.4	15.6	12.7	14.5	18.9	11.5	9.1
RTE Radio 1	3.6	4.0	4.1	3.4	.7	3.5	5.2	4.2	5.0
RTE 2FM	9.4	3.7	9.4	11.3	11.8	10.1	13.6	6.8	3.6
RTE Lyric FM	0.3	.2	.9	.9	.1	.2	0	.4	.2
Today FM	9.7	4.0	9.2	16.5	13.9	12.7	7.9	8.4	4.8
Newstalk	1.8	3.4	1.1	0.6	1.4	.9	2.0	2.4	3.8
Any Regional/Local/M-City/D-C#	74.9	84.3	75.3	67.3	72.1	71.9	71.2	77.7	82.3
Classic Hits 4FM		1.0	4.7					2.1	0.8
Radio Nova		5.2							5.1
Beat 102-103				47.7					
Spin South West					56.3				
i102-104						48.2			
i105-107							36.6		
98FM		8.2							
FM104		22.7							
Q102		9.2							
Sunshine 106.8		.1							
Spin 1038		36.9							
Phantom 105.2		1.0							
Corks 96FM/C103			33.2						
Corks 96FM			28.0						
C103 (Corks 103FM)			5.2						
Corks Red FM			30.4						
Mean No. of Minutes	163	157	241	134	156	167	141	170	152

Any regional/local/M-City/D-C includes any audience to Beat 102-103, Spin Sth West, i102-104, i105-107, Classic Hits 4FM & Radio Nova.

Adults Aged 15-34

Table 7: Share Of Listening (7am – 7pm)

	NATIONAL	CO. DUBLIN	CO. CORK	SOUTH EAST	SOUTH WEST	NORTH WEST	NORTH EAST & MID	MULTI-CITY	DUBLIN COMMUTER
	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %
Any National	36.4	25.9	35.8	47.0	40.6	38.8	42.8	33.3	29.1
Any RTE Radio	17.0	12.8	16.6	20.3	17.0	16.7	22.4	15.1	13.8
RTE Radio 1	5.6	5.8	7.0	5.9	2.8	4.7	6.0	6.1	6.4
RTE 2FM	10.2	4.9	8.9	13.7	13.9	10.2	15.8	7.4	5.3
RTE Lyric FM	0.8	1.6	.7	0.7	0.2	0.1	.6	1.1	1.7
Today FM	15.7	7.9	15.1	24.1	20.2	19.6	17.6	13.7	10.1
Newstalk	3.8	5.2	4.2	2.5	3.4	2.5	2.8	4.5	5.3
Any Regional/Local/M-City/D-C#	63.6	74.1	64.2	53.0	59.4	61.2	57.2	66.7	70.9
Classic Hits 4FM		1.3	5.1					2.6	1.1
Radio Nova		4.8							4.7
Beat 102-103				34.5					
Spin South West					33.1				
i102-104						34.7			
i105-107							22.7		
98FM		12.5							
FM104		23.0							
Q102		9.3							
Sunshine 106.8		0.7							
Spin 1038		21.0							
Phantom 105.2		1.5							
Corks 96FM/C103			30.7						
Corks 96FM			26.6						
C103 (Corks 103FM)			4.1						
Corks Red FM			24.5						
Mean No. of Minutes	195	188	261	165	183	202	184	200	188

Any regional/local/M-City/D-C includes any audience to Beat 102-103, Spin Sth West, i102-104, i105-107, Classic Hits 4FM & Radio Nova.

Adults Aged 35+

Table 8: Share of Listening (7am – 7pm)

	NATIONAL	CO. DUBLIN	CO. CORK	SOUTH EAST	SOUTH WEST	NORTH WEST	NORTH EAST & MID	MULTI-CITY	DUBLIN COMMUTER
	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %	Weekdays %
Any National	52.0	69.6	46.5	43.9	40.3	39.2	55.3	59.3	69.1
Any RTE Radio	39.4	55.5	35.9	30.9	28.8	27.6	41.9	45.6	54.7
RTE Radio 1	29.8	44.4	29.7	22.6	20.5	19.4	29.8	35.6	43.2
RTE 2FM	6.7	6.5	3.5	6.4	6.6	5.5	10.5	6.3	7.2
RTE Lyric FM	2.3	4.3	2.5	1.4	1.5	1.2	1.4	3.2	4.0
Today FM	7.6	5.6	6.8	10.3	8.2	8.0	9.1	7.4	6.4
Newstalk	5.0	8.6	3.8	2.7	3.3	3.6	4.3	6.3	8.0
Any Regional/Local/M-City/D-C#	48.0	30.4	53.5	56.1	59.7	60.8	44.7	40.7	30.9
Classic Hits 4FM		1.4	3.9					2.3	1.3
Radio Nova		2.4							2.4
Beat 102-103				3.9					
Spin South West					3.3				
i102-104						2.9			
i105-107							1.9		
98FM		5.6							
FM104		7.2							
Q102		7.9							
Sunshine 106.8		3.1							
Spin 1038		1.7							
Phantom 105.2		0.4							
Cork's 96FM/C103			44.3						
Corks 96FM			28.5						
C103 (Corks 103FM)			15.8						
Corks Red FM			4.3						
Mean No. of Minutes	259	256	310	230	255	266	248	266	256

Any regional/local/M-City/D-C includes any audience to Beat 102-103, Spin Sth West, i102-104, i105-107, Classic Hits 4FM & Radio Nova.

All Adults Aged 15+

Table 9: Average Weekday Yesterday Listenership & Share Of Listening (7am-7pm) For Local Stations

Station Area	Yesterday Listenership		Market Share (7-7)	
	Weekdays		Weekdays	
	<i>(change from Apr'11-Mar'12)</i>		<i>(change from Apr'11-Mar'12)</i>	
	%	%	%	%
Kildare	24	(-2)	22.1	(+3)
Kilkenny/Carlow	38	(-2)	36.7	(-3)
Louth/Meath	25	(-1)	34.0	(-2.1)
Laois/Offaly/Westmeath	36	(-2)	30.9	(-2.3)
Wexford	39	(+0)	33.3	(+1.1)
Wicklow	29	(+2)	23.5	(-9)
Limerick	45	(+0)	32.6	(-1.6)
Tipperary	50	(+2)	54.6	(-2.4)
Waterford	45	(+0)	47.0	(+1)
Clare	47	(+0)	42.5	(-3.1)
Kerry	49	(-3)	50.6	(-8)
Galway	46	(+5)	29.2	(+3.4)
Mayo	59	(-2)	51.5	(+4)
Roscommon/Longford/ Sth Leitrim/ Cavan/ Monaghan	45	(-2)	45.4	(-1.6)
Roscommon/Longford/Sth Leitrim	53	(-2)	46.7	(-2.9)
Cavan/Monaghan	38	(-1)	43.8	(+2)
Donegal Nth	67	(+1)	62.3	(+2)
Donegal South/Sligo/Nth Leitrim	48	(+0)	33.2	(-5)

* * * * *

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The Report provides information on all individual stations over a range of demographics and special interest categories. The full report can be purchased from Ipsos MRBI. Tel. 01-438 9000.

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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 & Midlands	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.