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JNLR Press Release
October 2013

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Ipsos MRBI/JNLR 2013/3 Summary Results

The latest JNLR/Ipsos MRBI report into radio listening is published today (31st October, 2013). It covers the 12-month period from October 2012 to September 2013.

The latest results show **daily radio listening at 83%** - that is 83% of all adults listening every weekday.

A total of c16,000 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.

83% of Irish adults listen to the radio on an average day - 57% (-1%) tuning into their local or regional station and 45% (=) listening to a national station. Among the younger 15-34 year market, 79% 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 currently has 47.0% share of all minutes while local/regional radio holds the majority share position with 53.0% (-0.6%).

In the various regions throughout the country, national radio holds the majority share position in Dublin (56.3%) and along the North East - the Dublin Commuter belt (57.1%), the Multi-city area (50.3%) and the North East & Midlands Area (51.4%) while local/regional radio is in the majority in the other regions throughout the country, in particular achieving its highest share position in the North West and Cork regions (61.7%). (See T5).

Among the younger, 15-34 year old, audience across the country, local/regional radio is in the majority share position at 64.3% (=) versus 35.7% for national radio. In particular, the local/regional group holds its strongest share position among this age segment in Dublin (75.3%), the Dublin Commuter region (73.5%), Cork (65.4%) and the Multi-city region (67.9%). (See T7).

On the other hand, among at the older 35+ age segment, national radio has a marginal majority share, 50.8% (+0.7%). However, in regional markets among this age group, national radio maintains a strong share position in Dublin (68.6%), the Dublin Commuter region (68.3%), in the Multi-city area (57.1%) and the North East & Midlands Area (54.0%). (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 Kerry, Mayo and Donegal Nth, at least half of the adult population tune in daily. In particular, on the criterion of share of minutes listened during prime 7am to 7pm, Highland Radio, MWR, Tipp FM and Radio Kerry hold the majority share position in their franchise areas. (T9).

The population estimates in this report are based on data provided by the CSO – *Quarterly National Household Survey* statistics.

(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 Jul'12-Jun'13)		Weekdays (change from Jul'12-Jun'13)		Weekdays (change from Jul'12-Jun'13)		Weekdays (change from Jul'12-Jun'13)		Weekdays (change from Jul'12-Jun'13)		Weekdays (change from Jul'12-Jun'13)		Weekdays (change from Jul'12-Jun'13)		Weekdays (change from Jul'12-Jun'13)		Weekdays (change from Jul'12-Jun'13)	
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Listened at all *	83	(-1)	80	(-1)	84	(-2)	82	(+0)	88	(-1)	89	(+0)	81	(-1)	82	(-1)	80	(-1)
Any National	45	(+0)	44	(+0)	45	(-1)	44	(+0)	47	(+1)	46	(+2)	45	(-1)	47	(+0)	45	(-1)
Any RTE Radio	34	(+0)	34	(+0)	34	(-2)	32	(-1)	36	(+2)	35	(+1)	33	(-1)	36	(+1)	35	(+0)
Any RTE Radio 1/ RTÉ 2FM /RTE Lyric FM	34	(+0)	34	(+0)	33	(-3)	32	(-1)	36	(+2)	32	(+1)	33	(-1)	35	(+0)	35	(+0)
RTÉ Radio 1	24	(+0)	28	(+0)	24	(-1)	22	(-1)	22	(+0)	22	(+1)	21	(+0)	26	(+0)	28	(+0)
RTÉ 2FM	11	(+0)	7	(+0)	10	(-1)	11	(+0)	15	(+2)	12	(+1)	13	(-1)	10	(+1)	8	(+0)
RTÉ Lyric FM	3	(+0)	5	(+1)	4	(-1)	3	(-1)	3	(+0)	2	(+0)	2	(+0)	4	(+0)	4	(+0)
Today FM	13	(+0)	8	(+1)	16	(+1)	15	(+1)	15	(+0)	14	(+0)	14	(+0)	12	(+0)	9	(+0)
Newstalk	8	(+0)	12	(+0)	8	(+0)	6	(+0)	5	(-2)	6	(+1)	7	(+0)	10	(+0)	12	(+0)
Any Regional/Local/M-City/D-C#	57	(-1)	47	(+0)	65	(-2)	59	(+1)	65	(-1)	70	(-1)	53	(+0)	54	(-1)	46	(-1)
Classic Hits 4FM			3	(+1)	7	(-1)									4	(+0)	3	(+1)
Radio Nova			5	(+1)													4	(+0)
Beat 102-103							23	(+0)										
Spin South West									19	(-1)								
iRadio NW											22	(+1)						
iRadio NE													11	(-1)				
Dublin's 98FM			8	(-1)														
FM104			20	(-2)														
Q102			10	(+1)														
Sunshine 106.8			3	(+0)														
Spin 1038			13	(+0)														
Phantom 105.2			2	(+0)														
Corks 96FM/C103					53	(+0)												
Corks 96FM					41	(-1)												
C103 (Corks 103FM)					16	(+1)												
Corks Red FM					17	(+0)												

* 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 *	77	76	75	72	82	81	74	75	74
Any National	20	9	25	21	29	27	23	19	11
Any RTE Radio	12	5	14	10	19	20	14	13	7
Any RTE Radio 1/ RTÉ 2FM /RTE Lyric FM	12	5	14	10	19	17	14	12	6
RTE Radio 1	4	2	4	3	3	5	5	3	3
RTE 2FM	8	2	10	8	17	12	10	8	4
RTE Lyric FM	1	1	2	0	0	1	0	1	1
Today FM	9	2	12	13	12	10	11	7	3
Newstalk	3	3	5	1	2	3	3	3	3
Any Regional/Local/M-City/D-C#	68	69	67	67	68	71	63	66	67
Classic Hits 4FM		1	3					2	1
Radio Nova		5							4
Beat 102-103				59					
Spin South West					63				
iRadio NW						60			
iRadio NE							31		
Dublin's 98FM		8							
FM104		34							
Q102		8							
Sunshine 106.8		1							
Spin 1038		43							
Phantom 105.2		2							
Corks 96FM/C103			36						
Cork's 96FM			34						
C103 (Corks 103 FM)			2						
Corks Red FM			45						

* 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 *	79	76	79	78	84	85	76	78	76
Any National	33	21	37	36	42	40	36	30	24
Any RTE Radio	19	12	23	19	24	24	20	17	13
Any RTE Radio 1/ RTÉ 2FM /RTE Lyric FM	18	11	23	19	24	22	20	17	12
RTE Radio 1	7	7	9	6	5	7	5	7	7
RTE 2FM	12	4	16	14	20	16	15	10	6
RTE Lyric FM	1	2	2	1	1	1	0	1	2
Today FM	16	7	21	20	23	22	18	14	8
Newstalk	6	7	7	6	4	5	6	6	7
Any Regional/Local/M-City/D-C#	61	62	65	59	63	67	55	62	61
Classic Hits 4FM		1	6					3	1
Radio Nova		5							5
Beat 102-103				48					
Spin South West					47				
iRadio NW						48			
iRadio NE							25		
Dublin's 98FM		10							
FM104		33							
Q102		9							
Sunshine 106.8		1							
Spin 1038		27							
Phantom 105.2		3							
Corks 96FM/C103			43						
Corks 96FM			38						
C103 (Corks 103FM)			7						
Corks Red FM			32						

* 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 *	86	82	87	84	90	91	84	85	82
Any National	52	59	49	48	50	48	50	57	59
Any RTE Radio	43	49	40	39	42	40	41	46	48
Any RTE Radio 1/ RTÉ 2FM /RTE Lyric FM	42	49	39	39	41	37	41	46	48
RTE Radio 1	33	42	33	30	30	29	30	38	41
RTE 2FM	10	8	7	9	12	10	12	9	9
RTE Lyric FM	5	7	6	4	5	3	3	6	6
Today FM	11	8	13	13	11	11	12	11	10
Newstalk	9	15	9	7	6	7	8	12	15
Any Regional/Local/M-City/D-C#	55	36	66	60	67	71	52	49	37
Classic Hits 4FM		4	8					5	4
Radio Nova		4							4
Beat 102-103				11					
Spin South West					6				
iRadio NW						9			
iRadio NE							4		
Dublin's 98FM		7							
FM104		12							
Q102		10							
Sunshine 106.8		4							
Spin 1038		4							
Phantom 105.2		1							
Cork's 96FM/C103			59						
Cork's 96FM			43						
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 Jul'12-Jun'13)		Weekdays (change from Jul'12-Jun'13)		Weekdays (change from Jul'12-Jun'13)		Weekdays (change from Jul'12-Jun'13)		Weekdays (change from Jul'12-Jun'13)		Weekdays (change from Jul'12-Jun'13)		Weekdays (change from Jul'12-Jun'13)		Weekdays (change from Jul'12-Jun'13)		Weekdays (change from Jul'12-Jun'13)	
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Any National	47.0	(+0.6)	56.3	(+1.1)	38.3	(-1.3)	44.9	(-0.5)	42.2	(+1.7)	38.3	(+0.4)	51.4	(+1.7)	50.3	(+0.6)	57.1	(+1.0)
Any RTE Radio	33.0	(+0.2)	42.1	(+1.0)	26.0	(-1.4)	28.8	(-2.2)	29.5	(+2.3)	25.6	(+0)	35.9	(+0.8)	36.0	(+0.4)	41.9	(+0.7)
RTÉ Radio 1	23.4	(+0.3)	34.6	(+1.0)	16.8	(-1.1)	19.9	(-1.6)	17.1	(+0.7)	16.2	(+0)	24.4	(+1.0)	26.6	(+0.3)	34.1	(+1.0)
RTÉ 2FM	7.3	(-0.1)	4.8	(-0.4)	6.1	(-0.1)	7.5	(-0.4)	10.7	(+1.3)	6.3	(+0.4)	10.3	(-0.6)	6.4	(+0)	5.4	(-0.6)
RTÉ Lyric FM	1.7	(+0)	2.7	(+0.5)	2.7	(-0.1)	1.2	(-0.3)	1.4	(+0.3)	0.7	(-0.4)	1.0	(+0.3)	2.2	(+0.1)	2.4	(+0.3)
Today FM	9.1	(+0.1)	5.8	(+0.1)	8.3	(+0.2)	12.5	(+1.2)	9.4	(-0.2)	9.9	(-0.1)	11.3	(+0.1)	8.2	(+0.2)	7.1	(+0.1)
Newstalk	4.8	(+0.2)	8.3	(+0.1)	3.9	(-0.1)	3.6	(+0.6)	3.3	(-0.4)	2.7	(+0.4)	4.1	(+0.6)	6.0	(+0)	7.9	(+0)
Any Regional/Local/M-City/D-C#	53.0	(-0.6)	43.7	(-1.1)	61.7	(+1.3)	55.1	(+0.5)	57.8	(-1.7)	61.7	(-0.4)	48.6	(-1.7)	49.7	(-0.6)	42.9	(-1.0)
Classic Hits 4FM			2.3	(+0.4)	4.4	(-0.4)									2.9	(+0.2)	2.0	(+0.4)
Radio Nova			3.8	(+0.1)													3.4	(+0)
Beat 102-103							14.8	(-0.2)										
Spin South West									9.3	(-0.2)								
iRadio NW											13.2	(+1.0)						
iRadio NE													7.3	(-0.3)				
Dublin's 98FM			5.4	(-0.5)														
FM104			12.8	(-1.3)														
Q102			8.2	(-0.4)														
Sunshine 106.8			2.5	(+0)														
Spin 1038			7.3	(+0.2)														
Phantom 105.2			1.0	(+0.1)														
Corks 96FM/C103					47.7	(+2.4)												
Corks 96FM					35.8	(+1.2)												
C103 (Corks 103FM)					12.0	(+1.3)												
Corks Red FM					7.5	(-1.3)												
Mean No. of Minutes	239	(+3)	232	(+9)	297	(+4)	212	(+3)	223	(-4)	239	(+3)	240	(-1)	247	(+6)	238	(+8)

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	21.8	8.4	23.2	20.5	33.7	20.9	32.6	19.6	11.4
Any RTE Radio	11.6	4.0	11.8	7.0	23.7	11.1	16.0	11.7	5.7
RTE Radio 1	2.5	1.1	2.0	2.4	1.6	3.9	4.5	2.4	1.8
RTE 2FM	8.2	2.2	8.7	4.0	22.1	5.2	10.8	8.3	3.4
RTE Lyric FM	0.5	0.7	1.1	0.3	0	0.8	0	0.7	0.6
Today FM	8.4	2.9	8.5	12.9	8.5	7.2	15.5	6.0	4.1
Newstalk	1.7	1.5	2.5	0.6	1.3	2.7	1.1	1.8	1.6
Any Regional/Local/M-City/D-C#	78.2	91.6	76.8	79.5	66.3	79.1	67.4	80.4	88.6
Classic Hits 4FM		1.7	2.3					1.8	1.4
Radio Nova		7.0							6.0
Beat 102-103				63.7					
Spin South West					53.3				
iRadio NW						56.9			
iRadio NE							33.5		
Dublin's 98FM		6.1							
FM104		26.4							
Q102		6.4							
Sunshine 106.8		0.2							
Spin 1038		42.4							
Phantom 105.2		0.9							
Corks 96FM/C103			36.6						
Corks 96FM			36.0						
C103 (Corks 103FM)			0.6						
Corks Red FM			34.8						
Mean No. of Minutes	157	151	207	123	148	167	147	165	149

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	35.7	24.7	34.6	41.3	45.4	38.5	42.6	32.1	26.5
Any RTE Radio	17.0	12.0	17.0	16.0	23.8	17.3	20.3	16.2	12.9
RTE Radio 1	5.5	7.6	4.9	3.7	3.4	5.1	4.9	6.3	7.3
RTE 2FM	10.5	3.3	11.4	12.0	19.9	9.9	14.8	8.7	4.6
RTE Lyric FM	0.5	1.0	0.5	0.2	0.4	0.5	0.3	0.6	0.8
Today FM	14.7	6.8	14.9	20.4	19.2	18.2	18.2	11.7	7.9
Newstalk	4.0	6.0	2.6	4.9	2.2	3.0	4.0	4.2	5.6
Any Regional/Local/M-City/D-C#	64.3	75.3	65.4	58.7	54.6	61.5	57.4	67.9	73.5
Classic Hits 4FM		1.0	4.4					2.5	0.9
Radio Nova		6.0							5.8
Beat 102-103				43.4					
Spin South West					33.1				
iRadio NW						36.9			
iRadio NE							23.5		
Dublin's 98FM		8.6							
FM104		27.2							
Q102		7.6							
Sunshine 106.8		0.6							
Spin 1038		22.7							
Phantom 105.2		1.4							
Corks 96FM/C103			38.1						
Corks 96FM			33.9						
C103 (Corks 103FM)			4.3						
Corks Red FM			19.4						
Mean No. of Minutes	187	180	254	156	172	201	171	197	181

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	50.8	68.6	39.8	46.0	41.2	38.2	54.0	57.1	68.3
Any RTE Radio	38.5	53.8	29.6	32.6	31.2	28.5	40.6	43.6	52.6
RTE Radio 1	29.5	45.0	21.5	24.7	21.4	20.1	30.2	34.4	44.0
RTE 2FM	6.2	5.3	4.0	6.2	7.8	5.1	8.9	5.6	5.6
RTE Lyric FM	2.1	3.4	3.5	1.5	1.7	0.8	1.2	2.8	2.9
Today FM	7.2	5.4	5.7	10.2	6.3	7.1	9.3	6.9	6.9
Newstalk	5.0	9.2	4.5	3.2	3.7	2.6	4.2	6.7	8.8
Any Regional/Local/M-City/D-C#	49.2	31.4	60.2	54.0	58.8	61.8	46.0	42.9	31.7
Classic Hits 4FM		2.8	4.4					3.1	2.4
Radio Nova		3.0							2.5
Beat 102-103				6.2					
Spin South West					1.9				
iRadio NW						4.9			
iRadio NE							2.5		
Dublin's 98FM		4.2							
FM104		7.2							
Q102		8.4							
Sunshine 106.8		3.3							
Spin 1038		1.3							
Phantom 105.2		0.8							
Cork's 96FM/C103			51.5						
Corks 96FM			36.6						
C103 (Corks 103FM)			15.0						
Corks Red FM			2.8						
Mean No. of Minutes	265	261	317	237	246	256	273	273	269

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	
	(change from Jul'12-Jun'13)		(change from Jul'12-Jun'13)	
	%	%	%	%
Kildare	22	(-2)	19.4	(-2.2)
Kilkenny/Carlow	38	(+3)	32.1	(+2.3)
Louth/Meath	23	(-2)	30.1	(-3.5)
Laois/Offaly/Westmeath	38	(+3)	31.2	(+1.9)
Wexford	38	(+3)	34.8	(+0.6)
Wicklow	26	(+1)	21.4	(+1.2)
Limerick	45	(+0)	35.2	(-1.5)
Tipperary	38	(-3)	50.1	(-1.4)
Waterford	44	(-2)	41.1	(-0.9)
Clare	46	(-1)	42.0	(-2.5)
Kerry	50	(-1)	52.3	(-1.4)
Galway	36	(-3)	26.7	(-1.8)
Mayo	62	(+3)	52.3	(+1.6)
Roscommon/Longford/ Sth Leitrim/ Cavan/ Monaghan	39	(-1)	40.5	(+1.2)
Roscommon/Longford/Sth Leitrim	45	(-2)	40.8	(+1.3)
Cavan/Monaghan	34	(+1)	40.1	(+1.2)
Donegal Nth	66	(+1)	63.4	(-3.7)
Donegal South/Sligo/Nth Leitrim	49	(-2)	29.5	(-4.0)

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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.