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Ipsos MRBI/JNLR 2014/1 Summary Results

The latest JNLR/Ipsos MRBI report into radio listening is published today (1st May, 2014). It covers the 12-month period from April 2013 to March 2014.

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

A total of c16,600 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.

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, 77% 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 47.2% share of all minutes while local/regional radio holds the majority share position with 52.8% (+0.6%).

In the various regions throughout the country, national radio holds the majority share position in Dublin (58.3%), the Dublin Commuter belt (58.1%) and the Multi-city area (50.8%) 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 (62.5%), Cork (61.5%) and South West regions (57.1%). (See T5).

Among the younger, 15-34 year old, audience across the country, local/regional radio is in the majority share position in all regions with a national share of 65.6% (+2.2%) versus 34.4% for national radio. In particular, the local/regional group holds its strongest share position among this age segment in Dublin (74.1%), the Dublin Commuter region (72.2%), North West (66.8%) and the Multi-city region (69.0%). (See T7).

On the other hand, among at the older 35+ age segment, national radio has the majority share of minutes, 51.3% (-0.2%). However, in regional markets among this age group, national radio maintains a strong share position in Dublin (69.7%), the Dublin Commuter region (68.6%), and in the Multi-city area (57.8%). (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 on a daily basis. In particular, on the criterion of share of minutes listened during prime 7am to 7pm, Highland Radio, MWR 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 Jan-Dec '13)		Weekdays (change from Jan-Dec '13)		Weekdays (change from Jan-Dec '13)		Weekdays (change from Jan-Dec '13)		Weekdays (change from Jan-Dec '13)		Weekdays (change from Jan-Dec '13)		Weekdays (change from Jan-Dec '13)		Weekdays (change from Jan-Dec '13)		Weekdays (change from Jan-Dec '13)	
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Listened at all *	83	(+0)	79	(+0)	83	(-1)	81	(+0)	87	(-1)	88	(+0)	81	(+0)	82	(+0)	80	(+1)
Any National	45	(+0)	45	(+0)	43	(-2)	43	(+0)	49	(+1)	45	(-1)	45	(+1)	47	(+0)	46	(+0)
Any RTE Radio	34	(+0)	34	(-1)	32	(-1)	31	(-1)	35	(-1)	35	(+0)	33	(+1)	35	(-1)	35	(+0)
Any RTE Radio 1/ RTÉ 2FM /RTE Lyric FM	33	(-1)	34	(-1)	31	(-2)	31	(-1)	35	(+0)	33	(+0)	33	(+1)	34	(-1)	35	(+0)
RTÉ Radio 1	24	(+0)	27	(-1)	23	(+0)	21	(+0)	22	(+1)	22	(+0)	22	(+1)	26	(+0)	27	(-1)
RTÉ 2FM	10	(-1)	7	(+0)	9	(-1)	12	(+0)	14	(-1)	11	(-1)	13	(+0)	9	(-1)	8	(+0)
RTÉ Lyric FM	4	(+0)	5	(+0)	5	(+0)	2	(-1)	3	(+0)	3	(+1)	2	(+0)	5	(+0)	5	(+0)
Today FM	12	(-1)	7	(-1)	14	(-3)	16	(+1)	16	(+1)	14	(-1)	14	(+0)	12	(-1)	9	(-1)
Newstalk	9	(+0)	14	(+1)	9	(+0)	7	(+0)	7	(+0)	7	(+0)	8	(+1)	11	(+0)	13	(+1)
Any Regional/Local/M-City/D-C#	57	(+1)	45	(+0)	63	(-1)	59	(+1)	63	(-1)	69	(+0)	54	(+0)	53	(+1)	46	(+1)
Classic Hits 4FM			3	(+0)	7	(+0)								5	(+1)	3	(+0)	
Radio Nova			5	(+0)													5	(+0)
Beat 102-103							24	(+1)										
Spin South West									19	(+1)								
iRadio NW											21	(+0)						
iRadio NE													13	(+1)				
Dublin's 98FM			9	(+1)														
FM104			19	(+0)														
Q102			9	(+0)														
Sunshine 106.8			3	(+0)														
Spin 1038			13	(+0)														
TXFM (Phantom 105.2)			1	(+0)														
Corks 96FM/C103					51	(-1)												
Corks 96FM					38	(-3)												
C103 (Corks 103FM)					16	(+1)												
Corks Red FM					17	(+2)												

* 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, iRadio, 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 *	75	74	71	72	81	82	73	75	74
Any National	19	11	20	18	33	22	22	19	13
Any RTE Radio	12	6	14	9	23	17	12	13	7
Any RTE Radio 1/ RTÉ 2FM /RTE Lyric FM	12	5	14	9	23	15	11	12	7
RTE Radio 1	3	2	5	2	3	4	4	3	3
RTE 2FM	9	2	11	8	21	12	7	9	4
RTE Lyric FM	1	1	1	0	1	0	0	1	1
Today FM	8	2	10	11	14	7	10	7	4
Newstalk	2	4	3	0	3	2	2	3	3
Any Regional/Local/M-City/D-C#	67	68	66	69	65	74	63	66	66
Classic Hits 4FM		1	5					2	1
Radio Nova		3							3
Beat 102-103				62					
Spin South West					60				
iRadio NW						61			
iRadio NE							35		
Dublin's 98FM		8							
FM104		32							
Q102		8							
Sunshine 106.8		1							
Spin 1038		44							
Phantom 105.2		2							
Corks 96FM/C103			34						
Cork's 96FM			31						
C103 (Corks 103 FM)			3						
Corks Red FM			42						

* 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, iRadio, 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 *	77	75	74	76	83	84	77	76	75
Any National	31	21	32	34	44	36	34	29	24
Any RTE Radio	18	12	21	19	22	22	20	17	14
Any RTE Radio 1/ RTÉ 2FM /RTE Lyric FM	18	12	20	19	22	21	19	16	13
RTE Radio 1	6	7	8	4	4	6	6	6	7
RTE 2FM	12	5	15	16	18	15	14	10	6
RTE Lyric FM	1	2	1	1	1	1	1	2	2
Today FM	15	7	17	19	25	19	17	14	9
Newstalk	6	8	6	4	6	4	5	7	8
Any Regional/Local/M-City/D-C#	61	61	62	58	59	68	59	61	60
Classic Hits 4FM		2	6					4	1
Radio Nova		5							5
Beat 102-103				49					
Spin South West					45				
iRadio NW						47			
iRadio NE							30		
Dublin's 98FM		11							
FM104		31							
Q102		9							
Sunshine 106.8		2							
Spin 1038		26							
Phantom 105.2		2							
Corks 96FM/C103			39						
Corks 96FM			34						
C103 (Corks 103FM)			8						
Corks Red FM			30						

* 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, iRadio, 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 *	85	82	87	84	89	90	83	85	83
Any National	52	59	49	47	51	50	51	57	60
Any RTE Radio	42	48	38	37	42	40	40	46	48
Any RTE Radio 1/ RTÉ 2FM /RTE Lyric FM	42	48	37	37	41	38	40	45	48
RTE Radio 1	33	40	32	29	30	30	30	37	40
RTE 2FM	10	8	6	10	12	9	12	9	9
RTE Lyric FM	5	7	7	3	4	3	3	6	7
Today FM	11	7	12	14	12	11	12	10	9
Newstalk	11	17	11	8	8	9	9	14	16
Any Regional/Local/M-City/D-C#	54	36	64	59	65	69	52	49	38
Classic Hits 4FM		4	8					5	4
Radio Nova		5							4
Beat 102-103				11					
Spin South West					7				
iRadio NW						9			
iRadio NE							4		
Dublin's 98FM		7							
FM104		12							
Q102		9							
Sunshine 106.8		4							
Spin 1038		4							
TXFM (Phantom 105.2)		1							
Cork's 96FM/C103			57						
Cork's 96FM			41						
C103 (Corks 103FM)			20						
Corks Red FM			9						

* 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, iRadio, 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 Jan-Dec '13)		Weekdays (change from Jan-Dec '13)		Weekdays (change from Jan-Dec '13)		Weekdays (change from Jan-Dec '13)		Weekdays (change from Jan-Dec '13)		Weekdays (change from Jan-Dec '13)		Weekdays (change from Jan-Dec '13)		Weekdays (change from Jan-Dec '13)		Weekdays (change from Jan-Dec '13)	
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Any National	47.2	(-0.6)	58.3	(-0.2)	38.5	(-1.8)	45.5	(+0.2)	42.9	(+0.6)	37.5	(-1.1)	49.2	(-1.7)	50.8	(-1.0)	58.1	(-0.7)
Any RTE Radio	32.5	(-0.8)	42.8	(-0.4)	24.8	(-1.5)	28.4	(-0.7)	28.7	(-0.6)	25.5	(-0.9)	33.5	(-1.3)	35.5	(-1.1)	42.1	(-0.7)
RTÉ Radio 1	23.1	(-0.4)	34.1	(-0.7)	16.7	(-0.2)	18.7	(-0.9)	17.7	(+0.7)	16.5	(-0.1)	23.1	(-1.1)	26.4	(-0.3)	33.4	(-0.8)
RTÉ 2FM	7.1	(-0.5)	5.7	(+0.3)	4.8	(-2.0)	8.6	(+0.3)	9.6	(-1.1)	6.5	(-0.3)	8.9	(-0.6)	6.3	(-0.7)	6.0	(+0.1)
RTÉ Lyric FM	1.7	(-0.1)	2.8	(+0)	2.3	(-0.1)	0.8	(-0.3)	1.2	(-0.3)	0.9	(+0)	1.1	(+0.3)	2.2	(-0.1)	2.5	(-0.1)
Today FM	9.0	(-0.2)	5.8	(-0.4)	8.8	(-0.6)	13.4	(+1.1)	10.1	(+1.1)	8.6	(-0.7)	11.1	(-0.5)	8.2	(-0.3)	6.9	(-0.5)
Newstalk	5.6	(+0.3)	9.7	(+0.7)	4.9	(+0.3)	3.7	(-0.2)	4.2	(+0.2)	3.4	(+0.5)	4.6	(+0.1)	7.1	(+0.5)	9.1	(+0.6)
Any Regional/Local/M-City/D-C#	52.8	(+0.6)	41.7	(+0.2)	61.5	(+1.8)	54.5	(-0.2)	57.1	(-0.6)	62.5	(+1.1)	50.8	(+1.7)	49.2	(+1.0)	41.9	(+0.7)
Classic Hits 4FM			2.3	(-0.3)	3.7	(-0.1)									2.9	(+0.1)	2.0	(-0.2)
Radio Nova			3.8	(-0.4)													3.5	(-0.3)
Beat 102-103							15.5	(+0.5)										
Spin South West									9.4	(+0.7)								
iRadio NW											13.0	(-0.3)						
iRadio NE													8.6	(+0.8)				
Dublin's 98FM			5.5	(+0.2)														
FM104			12.5	(+0.4)														
Q102			6.9	(+0.2)														
Sunshine 106.8			2.7	(+0.2)														
Spin 1038			6.6	(-0.3)														
TXFM (Phantom 105.2)			1.0	(+0.2)														
Corks 96FM/C103					47.8	(+0.7)												
Corks 96FM					35.2	(-0.3)												
C103 (Corks 103FM)					12.6	(+1.0)												
Corks Red FM					8.5	(+1.1)												
Mean No. of Minutes	234	(-1)	231	(+2)	292	(-2)	214	(-1)	210	(-5)	235	(+0)	230	(+0)	240	(-2)	233	(+1)

Any regional/local/M-City/D-C includes any audience to Beat 102-103, Spin Sth West, iRadio, 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	19.3	8.1	21.2	17.2	35.9	14.3	28.3	18.4	12.1
Any RTE Radio	10.7	4.1	12.6	7.3	23.5	8.8	11.8	10.8	5.8
RTE Radio 1	2.2	1.5	2.8	1.2	1.5	2.3	3.1	2.0	1.7
RTE 2FM	7.4	1.9	8.9	5.7	22.0	5.3	6.1	8.0	3.4
RTE Lyric FM	0.5	0.8	1.0	0.4	0	0.1	0.8	0.6	0.6
Today FM	7.3	2.3	7.2	9.4	10.6	4.4	15.3	6.0	4.7
Newstalk	1.3	1.7	1.4	0.5	1.7	1.2	1.1	1.5	1.6
Any Regional/Local/M-City/D-C#	80.7	91.9	78.8	82.8	64.1	85.7	71.7	81.6	87.9
Classic Hits 4FM		1.1	4.7					2.3	0.9
Radio Nova		4.0							3.8
Beat 102-103				71.2					
Spin South West					47.8				
iRadio NW						60.1			
iRadio NE							35.6		
Dublin's 98FM		7.4							
FM104		24.0							
Q102		9.8							
Sunshine 106.8		1.3							
Spin 1038		42.5							
TXFM (Phantom 105.2)		1.4							
Corks 96FM/C103			33.5						
Corks 96FM			32.2						
C103 (Corks 103FM)			1.2						
Corks Red FM			37.0						
Mean No. of Minutes	150	144	210	116	139	156	142	159	143

Any regional/local/M-City/D-C includes any audience to Beat 102-103, Spin Sth West, iRadio, 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	34.4	25.9	31.5	42.5	43.8	33.2	40.5	31.0	27.8
Any RTE Radio	16.2	12.0	16.0	17.9	18.2	16.2	19.3	14.5	12.6
RTE Radio 1	4.7	6.3	3.9	3.3	2.1	3.4	6.0	4.7	6.1
RTE 2FM	10.4	4.5	10.7	14.5	15.6	11.5	12.1	8.7	5.5
RTE Lyric FM	0.6	1.1	0.4	0.1	0.4	0.5	0.5	0.7	1.0
Today FM	14.1	6.8	13.0	20.7	21.6	14.6	17.7	11.7	8.5
Newstalk	4.2	7.0	2.5	3.8	4.0	2.4	3.5	4.8	6.5
Any Regional/Local/M-City/D-C#	65.6	74.1	68.5	57.5	56.2	66.8	59.5	69.0	72.2
Classic Hits 4FM		0.9	4.5					2.7	0.9
Radio Nova		5.1							5.0
Beat 102-103				45.4					
Spin South West					32.1				
iRadio NW						39.7			
iRadio NE							26.9		
Dublin's 98FM		8.9							
FM104		27.3							
Q102		7.5							
Sunshine 106.8		1.4							
Spin 1038		20.6							
TXFM (Phantom 105.2)		2.0							
Corks 96FM/C103			39.4						
Corks 96FM			33.7						
C103 (Corks 103FM)			5.7						
Corks Red FM			22.1						
Mean No. of Minutes	182	173	256	164	159	183	173	188	174

Any regional/local/M-City/D-C includes any audience to Beat 102-103, Spin Sth West, iRadio, 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	51.3	69.7	41.1	46.4	42.7	38.9	52.1	57.8	68.6
Any RTE Radio	37.9	53.6	28.1	31.6	31.7	28.4	38.1	43.0	52.3
RTE Radio 1	29.2	44.0	21.6	23.4	22.2	20.5	28.6	34.1	42.8
RTE 2FM	6.0	6.1	2.5	6.9	7.8	4.9	7.9	5.4	6.2
RTE Lyric FM	2.1	3.4	3.0	1.0	1.5	1.0	1.3	2.8	3.1
Today FM	7.3	5.4	7.2	11.2	6.7	6.7	9.0	6.9	6.3
Newstalk	6.1	10.6	5.8	3.6	4.2	3.7	5.0	7.9	9.9
Any Regional/Local/M-City/D-C#	48.7	30.3	58.9	53.6	57.3	61.1	47.9	42.2	31.4
Classic Hits 4FM		2.8	3.4					2.9	2.5
Radio Nova		3.3							3.0
Beat 102-103				6.5					
Spin South West					2.7				
iRadio NW						4.8			
iRadio NE							2.7		
Dublin's 98FM		4.3							
FM104		7.2							
Q102		6.7							
Sunshine 106.8		3.1							
Spin 1038		1.7							
TXFM (Phantom 105.2)		0.6							
Cork's 96FM/C103			51.0						
Corks 96FM			35.8						
C103 (Corks 103FM)			15.3						
Corks Red FM			3.5						
Mean No. of Minutes	259	262	309	236	232	257	257	267	264

Any regional/local/M-City/D-C includes any audience to Beat 102-103, Spin Sth West, iRadio, 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 Jan-Dec'13)		(change from Jan-Dec'13)	
	%	%	%	%
Kildare	25	(+2)	17.1	(-0.6)
Kilkenny/Carlow	34	(+0)	29.9	(+0.4)
Louth/Meath	23	(+1)	30.3	(-0.3)
Laois/Offaly/Westmeath	36	(+0)	36.4	(+4.8)
Wexford	37	(+1)	31.0	(-1.9)
Wicklow	30	(+1)	25.3	(-0.1)
Limerick	43	(-2)	37.5	(+0.2)
Tipperary	36	(-2)	49.0	(-1.9)
Waterford	46	(+0)	41.4	(-0.5)
Clare	44	(-1)	36.1	(-3.3)
Kerry	50	(-1)	50.3	(-3.5)
Galway	32	(+0)	26.3	(+0.7)
Mayo	62	(+1)	58.4	(+5.6)
Roscommon/Longford/ Sth Leitrim/ Cavan/ Monaghan	43	(+1)	40.7	(+0.6)
Roscommon/Longford/Sth Leitrim	48	(+0)	43.6	(+1.4)
Cavan/Monaghan	39	(+2)	37.0	(-0.4)
Donegal Nth	64	(-1)	63.8	(-0.6)
Donegal South/Sligo/Nth Leitrim	44	(-4)	28.6	(-3.5)

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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.