

# RADIO AND THE IRISH AUDIO MARKET

JNLR - AUGUST 2021



JOINT NATIONAL  
LISTENERSHIP RESEARCH



# IN SUMMARY



- 1 Radio is in a healthy position in 2021. 80% of the adult population, or 3,171,000 people (15+), tune in every day, for a total of 13.1 million hours per day, reflecting the sustainability of a long established medium.

Among the younger 15-24 cohort, almost seven in ten listen to radio on a daily basis, tuning in for more than 3 hours, an enviable position in a crowded media space.

- 2 Irish audiences are highly connected. Ownership of smart phones (86%) and smart speakers (30%) enables easy access to audio material.

The growth in ownership of smart speakers has been relatively rapid, almost trebling since 2018. Ownership is higher among younger people.

- 3 Most listening to audio material happens in the home. Three in every four listened to audio at home yesterday, a typical day. One-third listened in a car/van and almost one-in ten in a work or school/college environment (9%) and when out walking or cycling (8%).

72% used a radio or music player to listen to their audio material 'yesterday' while the next device of choice is the smart phone used by 28% of the population. 9% used a PC/laptop and 6% a smart speaker.

- 4 Almost universal weekly listening to Live Radio among the population (92%). This compares to 53% listening to on-demand, online audio.

Rather than supplanting *Live* Radio, over time music streaming services are replacing our traditional music archives such as CD's, vinyl or downloads. Currently, 37% listen to Spotify or similar on a weekly basis compared to 22% listening to their own music,

On an average day, Live radio currently has a share of 78.8% of the audio market reflecting the depth of engagement listeners have with radio. While many tune into on-demand audio, they spend much less time doing so.

There is more activity among the younger 15-24 year old audience in this space. While more of this group tune into on-demand audio options than the average audience, *Live* radio still achieves the majority share of time spent – 53.2%. Music streaming (Spotify or similar) has a share of 25.2% among this group followed by YouTube for Music (14.2%).

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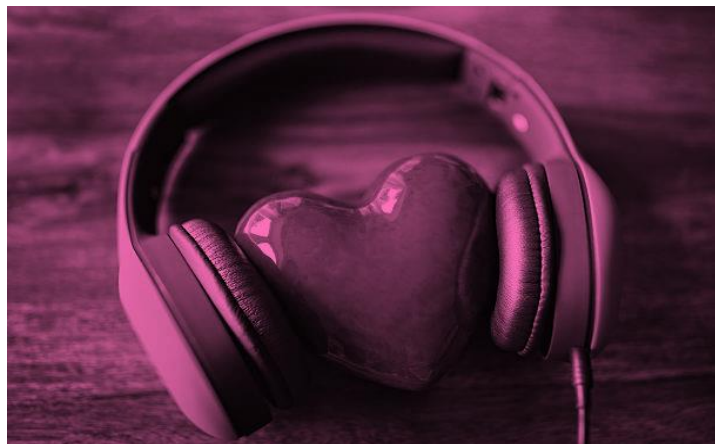
## OUR AUDIO ENVIRONMENT



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## THE IRISH AUDIO MARKET





## KEY DATA

**Radio is in a very healthy place in 2021. More than 3.1 million listeners tune in every day listening for an impressive 13.1 million hours!**

**80%**

**listen to radio every day**

**3.17 million**

**people listening every day**

**4 hrs  
16 mins**

**average time spent per listener every day**

**13.1 million**

**total hours every day**



**Radio maintains its prominent position among the general public over the years.**

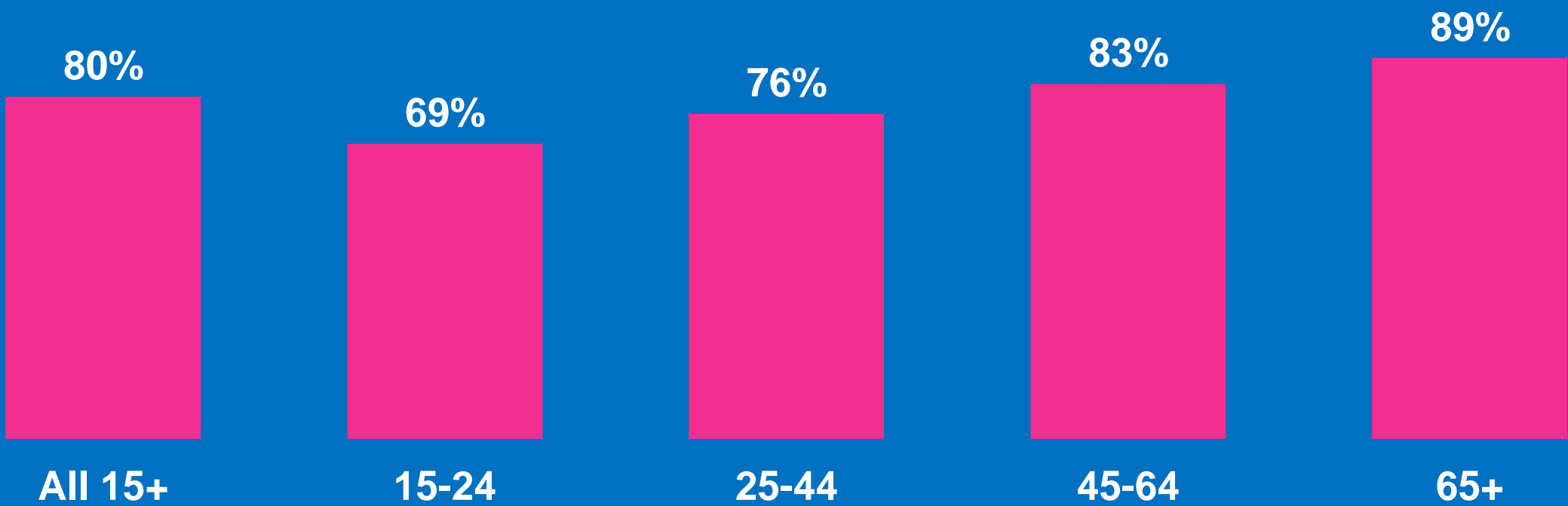
**In an environment where media content and platforms continue to multiply, huge audiences remain committed to radio.**

## Radio Daily Reach



Among the 15-24 cohort radio holds an enviable position – 7 in 10 tuning into radio every day

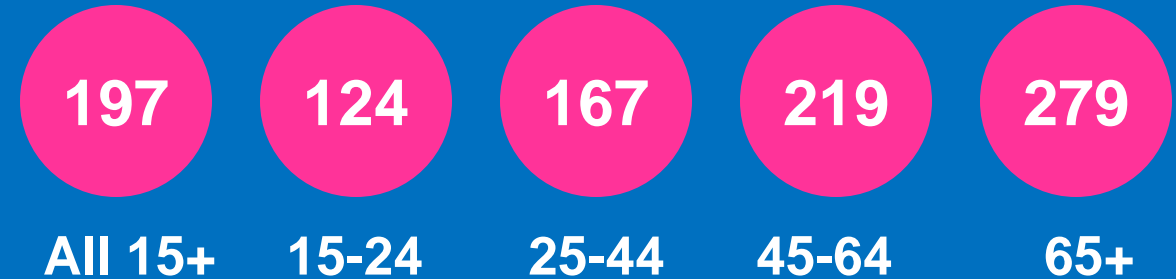
Radio Daily Reach



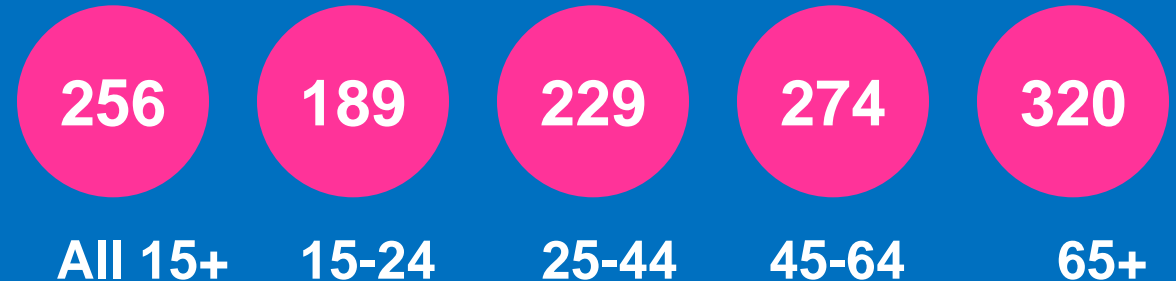
Radio's standing, with listeners tuning in for more than 4 hours per day, reflects the sustainability of a long established medium.

The younger listener engages with radio for more than 3 hours on average per day – a very significant level of engagement.

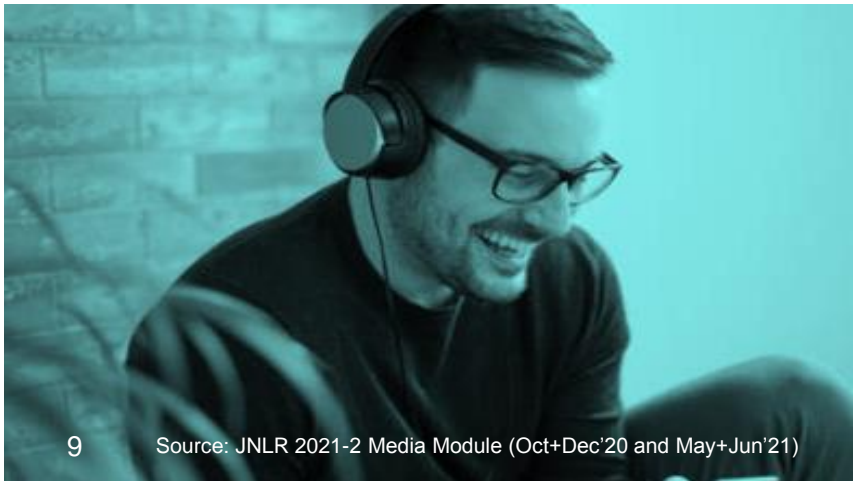
## Average Daily Minutes x Head of Population



## x Radio Listener







# TECHNOLOGY ENABLES ACCESS

# Irish audiences are highly connected



**89%**  
HAVE  
BROADBAND  
ACCESS

**86%**  
OWN  
SMART  
PHONE

**65%**  
OWN  
TABLET

**30%**  
OWN  
VOICE  
ACTIVATED  
TECHNOLOGY

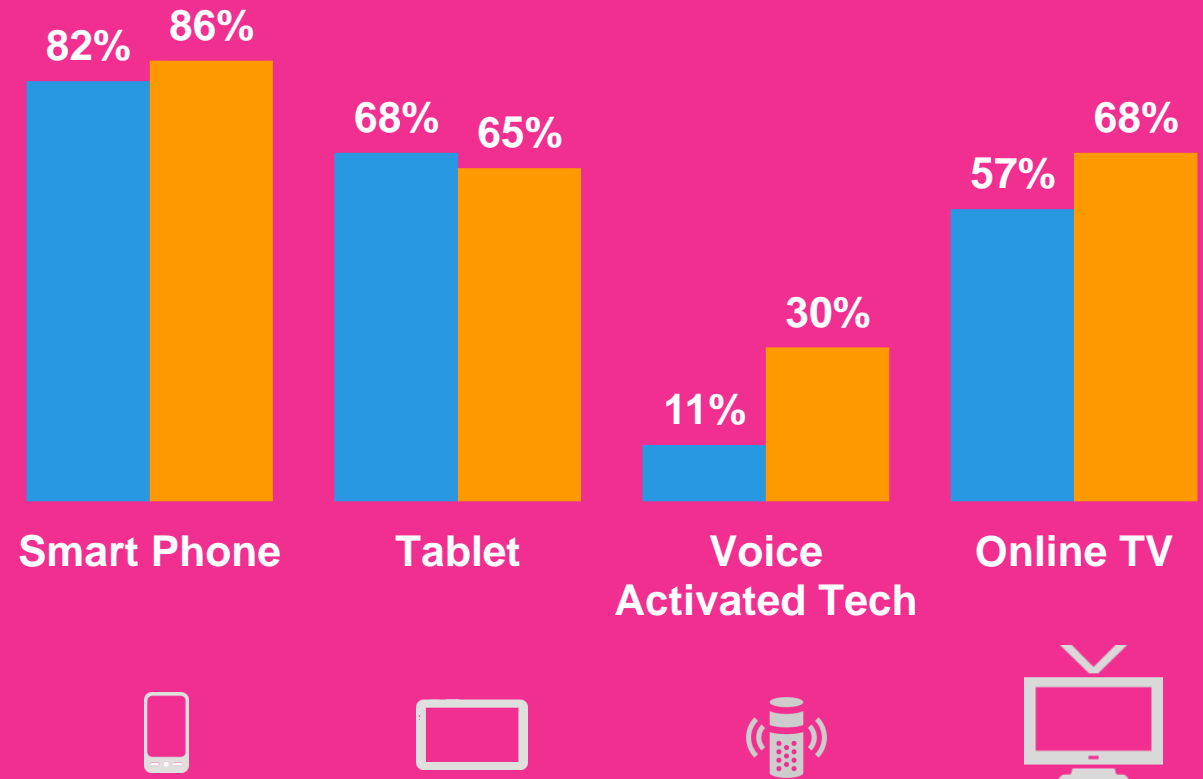
**68%**  
HAVE  
ONLINE TV  
(NETFLIX,  
DISNEY+ ETC.)

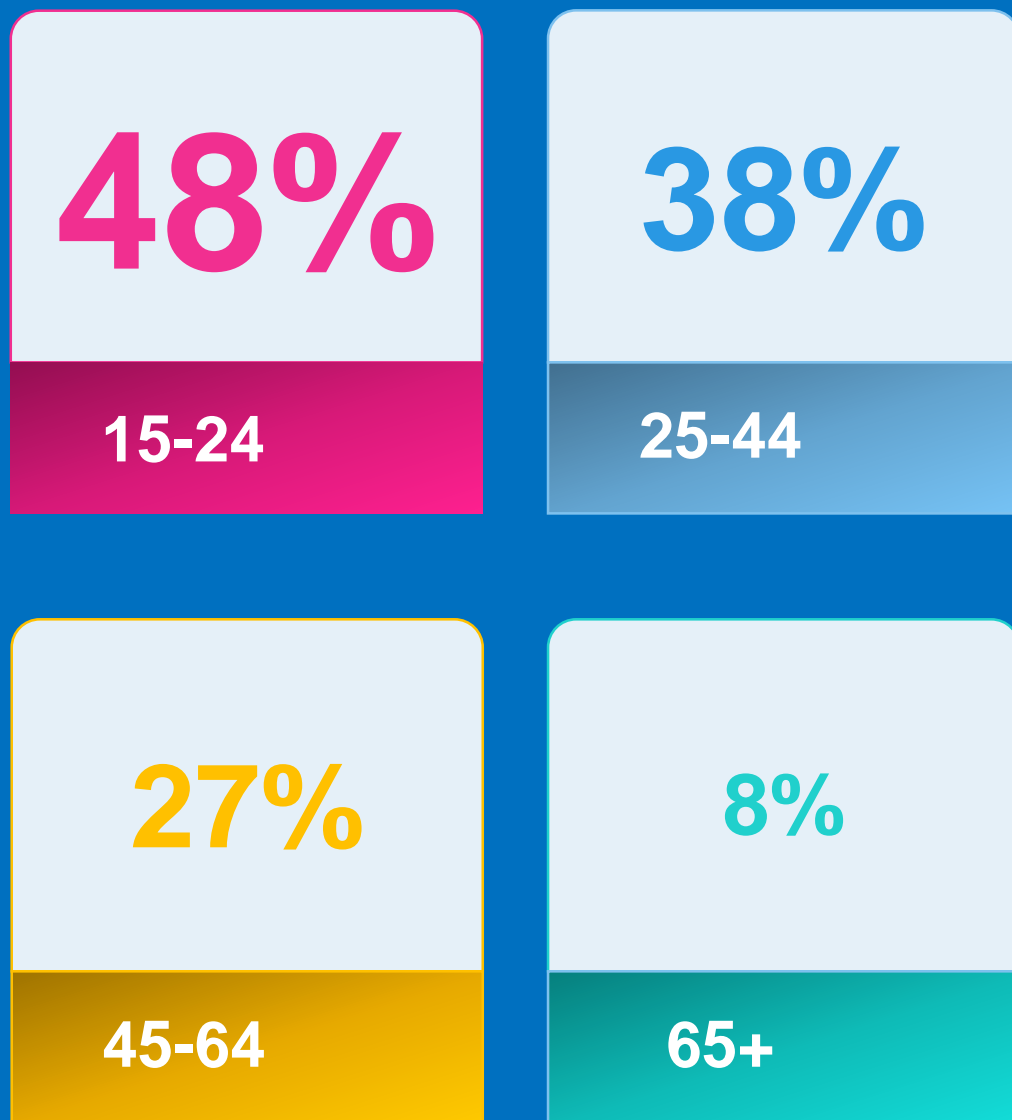
Widespread ownership of smartphones enables access to audio anytime, anywhere.

Ownership of voice activated technology, such as Alexa, has almost trebled since 2018.

## OWNERSHIP OF TECHNOLOGY

■ 2018 ■ 2021



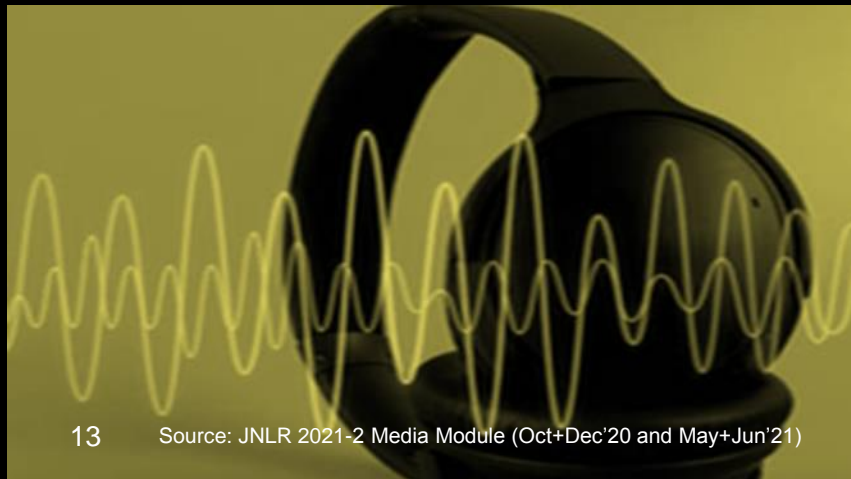


*Alexa, play .....*



**Ownership of voice activated technology makes it easy to access audio material.**

**Ownership significantly higher among younger age groups.**



# OUR DAILY AUDIO ENVIRONMENT



Three in every four people listen to audio material at home on a typical day (*'yesterday'*).

The radio / music player is used by the vast majority of people to listen to audio.

**75%**

listen to audio at home

**72%**

use a radio or music player to listen

**34%**

listen to audio in the car

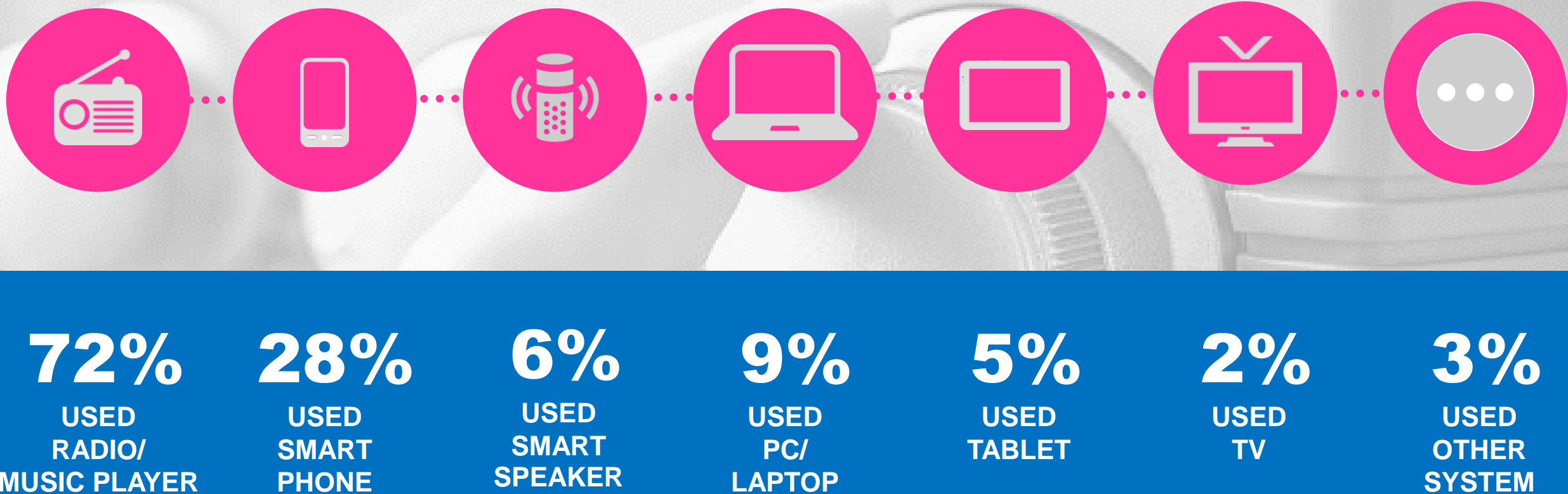
**28%**

use a smart phone to listen



# The radio remains the most used device to listen to audio content

## Any Audio Activity – ‘Yesterday’ (Average Day)



## Live Radio Audience (79% yesterday)

89%

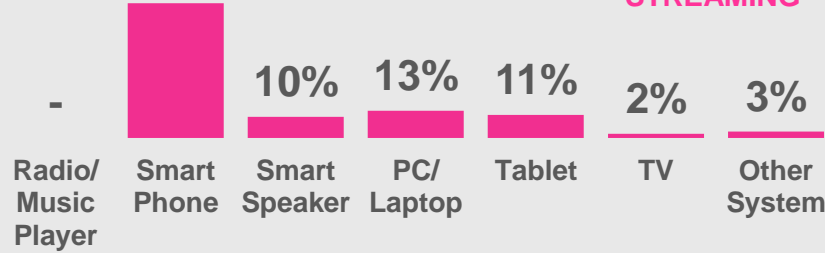


Radio/ Music Player Smart Phone Smart Speaker PC/ Laptop Tablet TV Other System



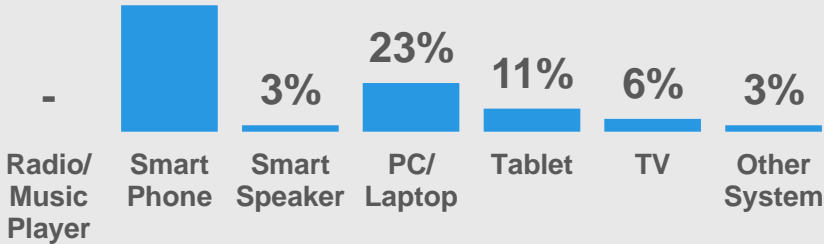
## Music Streaming Audience (25% yesterday)

64%



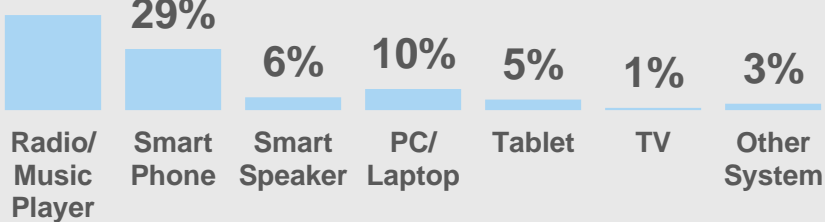
## YouTube Music Audience (18% yesterday)

60%



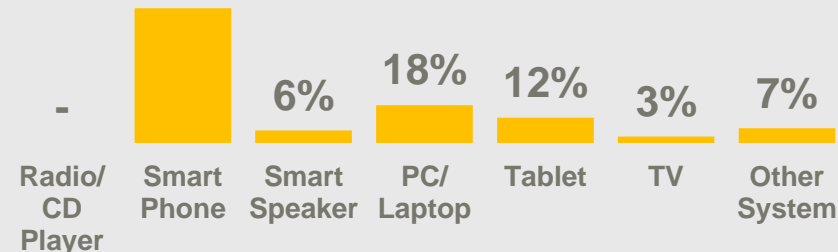
## Own Music Audience (8% yesterday)

45%



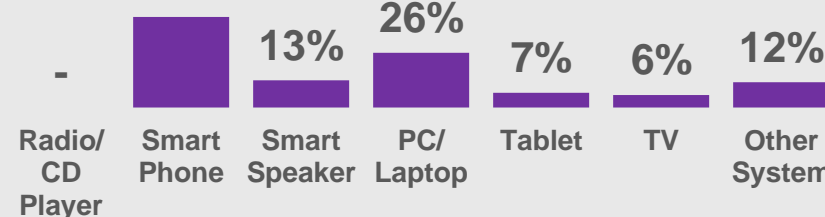
## Podcast Audience (5% yesterday)

64%



## Listen Back Irish Radio Audience (2% yesterday)

43%



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

*Note: Device analysis based on format audience yesterday - Some small base sizes*

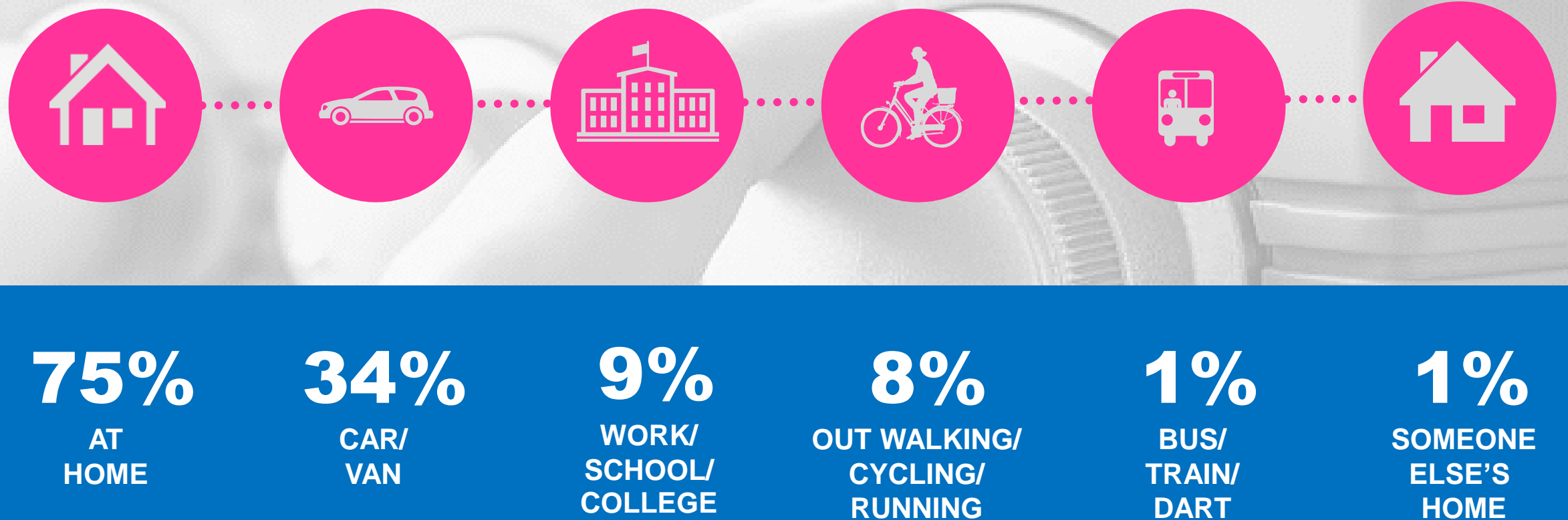
*Source: JNLR 2021-2 Media Module (Oct+Dec'20 and May+Jun'21)*



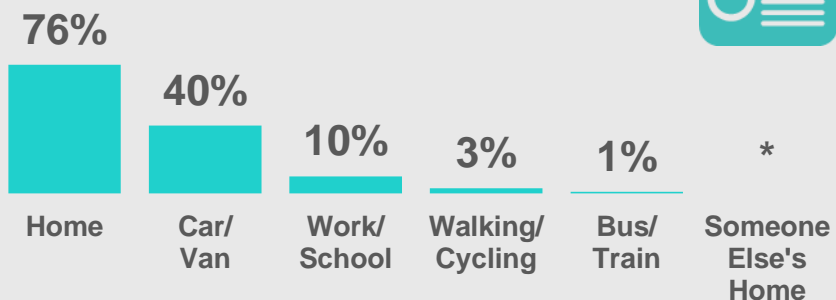
**Ipsos MRBI**  
GAME CHANGERS

# Most listening to audio material happens in the home

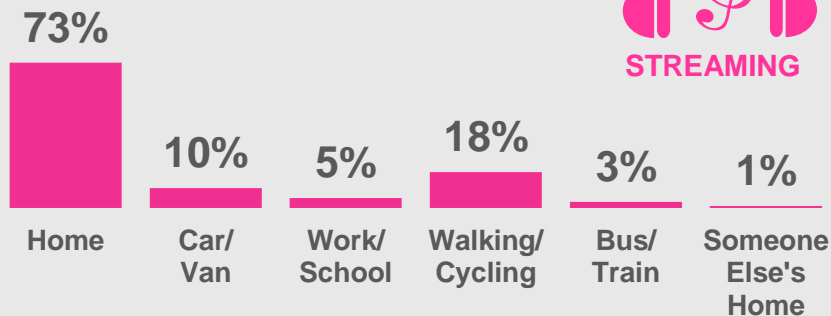
Any Audio Activity – ‘Yesterday’ (Average Day)



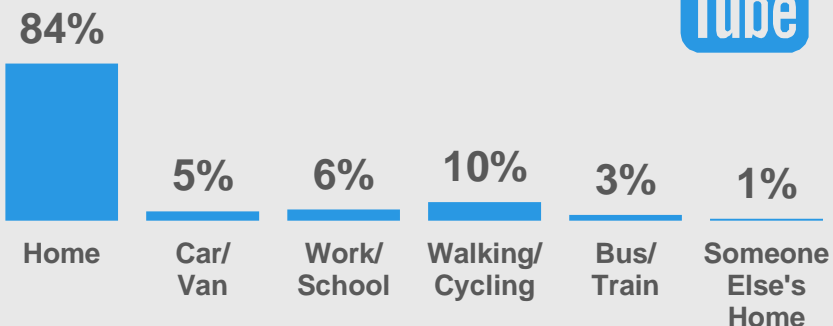
## Live Radio Audience (79% yesterday)



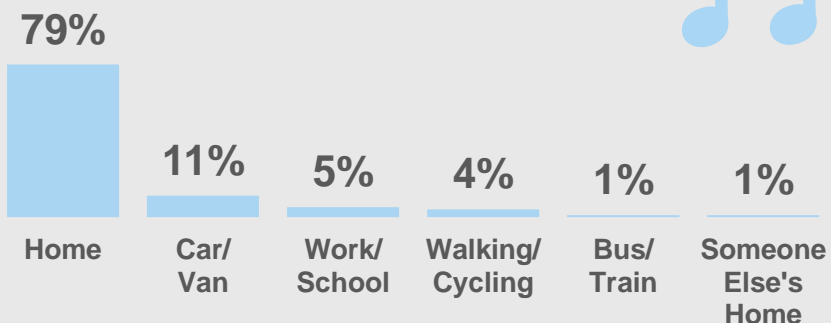
## Music Streaming Audience (25% yesterday)



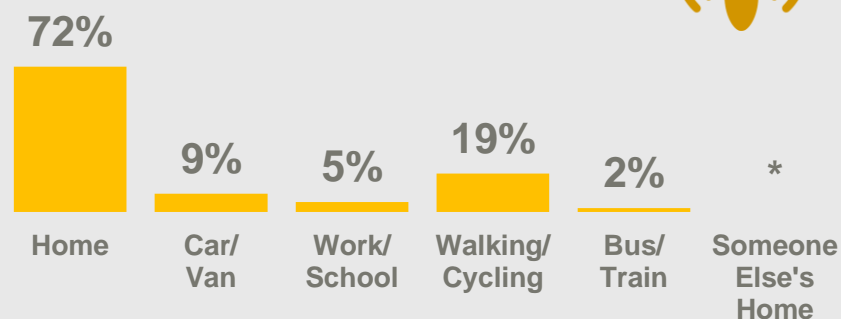
## YouTube Music Audience (18% yesterday)



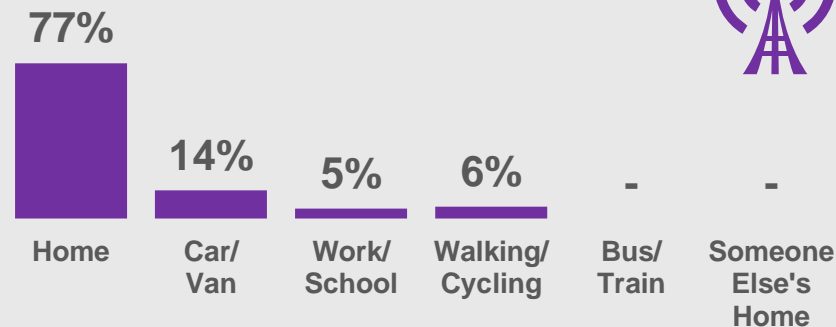
## Own Music Audience (8% yesterday)



## Podcast Audience (5% yesterday)



## Listen Back Irish Radio Audience (2% yesterday)



**82%**  
Use car/van  
as main  
transport

**Live radio - the  
biggest format  
in car  
environment.**

*Note: Location analysis based on format audience yesterday - Some small base sizes*

*Source: JNLR 2021-2 Media Module  
(Oct+Dec'20 and May+Jun'21)*



**Ipsos MRBI**  
GAME CHANGERS

**82%**

Use  
Car/van

Typical mode of transport likely impacts on activity – 8 in 10 currently use a car/van *most often* for commuting/getting around

## More Dubliners use public transport than the national average

	National	Dublin
Car/Van	82%	72%
Walking	10%	13%
Public Transport	6%	12%
Cycling	1%	1%
Motorbike	*	-



# THE IRISH AUDIO MARKET



**Almost universal  
listening to *live* radio  
on a weekly basis, far  
exceeds the weekly  
audience levels to on-  
demand, online audio.**

**92%**

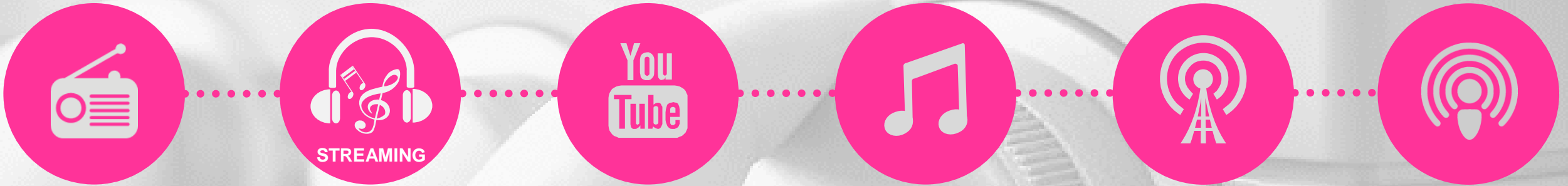
**listen to *live* radio weekly**

**53%**

**listen to on-demand, online  
audio weekly**

# The audio market is dominated by *live* radio

## WEEKLY LISTENING



**92%**

LISTEN TO  
LIVE  
RADIO

**37%**

LISTEN TO  
MUSIC  
STREAMING

**36%**

LISTEN TO  
YOUTUBE  
MUSIC

**22%**

LISTEN TO  
OWN  
MUSIC

**6%**

LISTEN BACK  
TO IRISH RADIO

**17%**

LISTEN TO  
PODCAST




Over time,  
music streaming  
is supplanting  
our *CD/own  
music* archives.

## ALL 15+ WEEKLY LISTENING

	2018	2019	2021
Radio	94%	93%	92%
Music Streaming	22%	26%	37%
YouTube Music	n/a	36%	36%
Own Music	38%	36%	22%
Listen Back		6%	6%
Any Podcast	11%	9%	17%

# Listening to Audio in Past (Average) Week - Reach

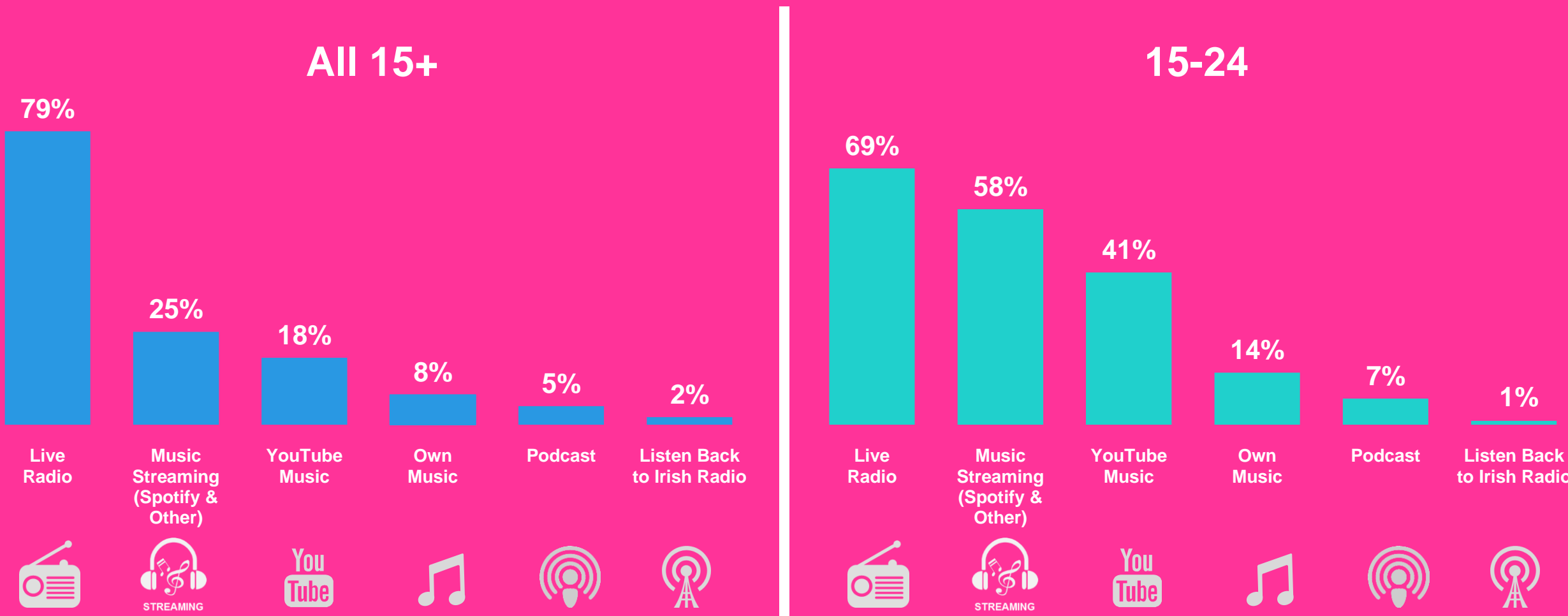
	15+	15-24	25-44	45-64	65+
	%	%	%	%	%
Live Radio	92	87	91	93	97
Music Streaming (Spotify & Other)	37	78	49	23	5
YouTube Music	36	67	47	24	9
Own Music	22	30	25	20	17
Any Podcast	17	30	21	14	4
- Irish Radio Podcast	9	12	9	9	3
- Other Podcast	14	27	18	10	3
Listen Back to Irish Radio	6	8	7	7	1

# AND NOW THE DAILY PICTURE



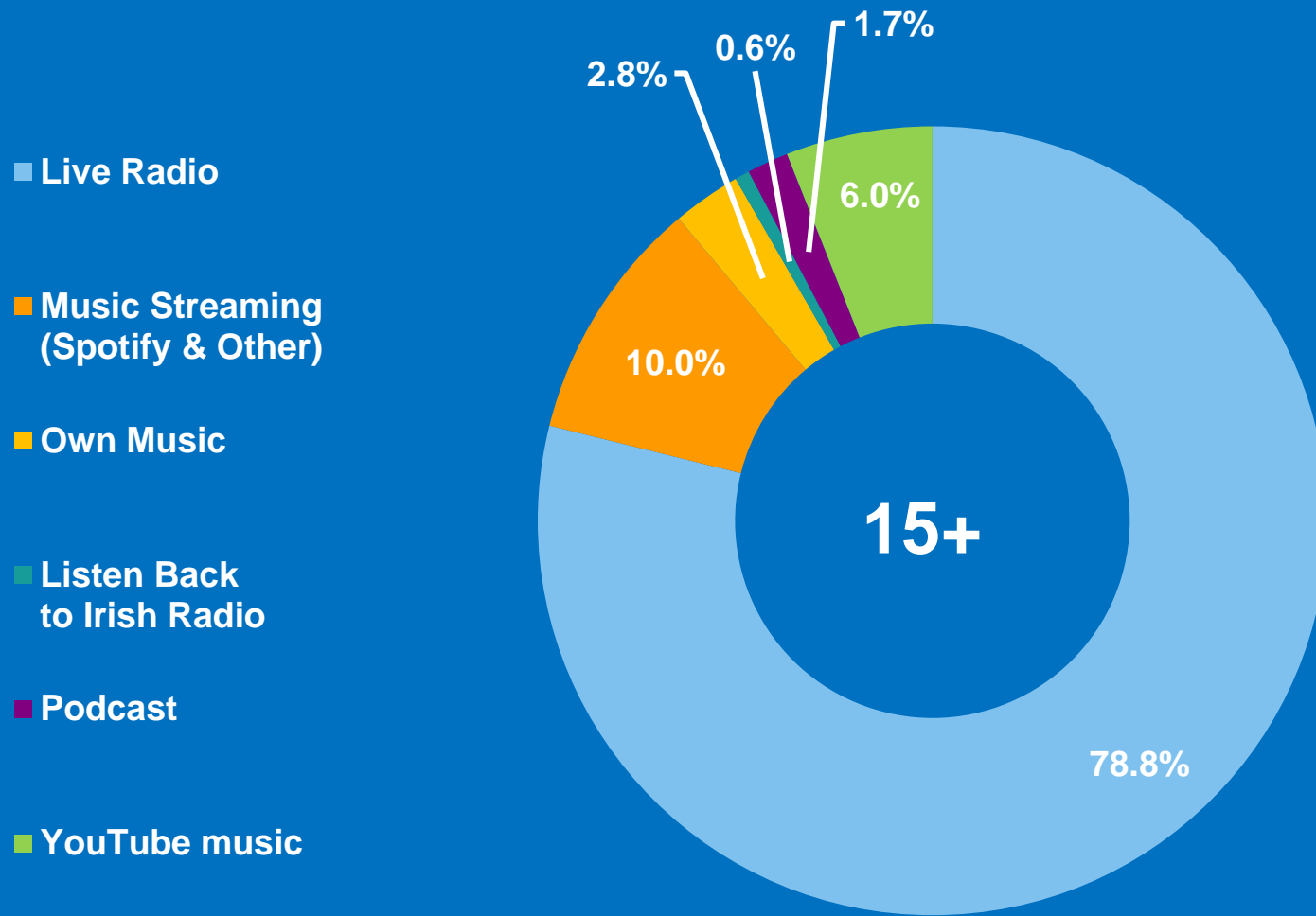
Radio is embedded in the daily lives of audiences, reaching more than three times as many people as audio streaming or other on-demand formats

DAILY ‘YESTERDAY’ REACH





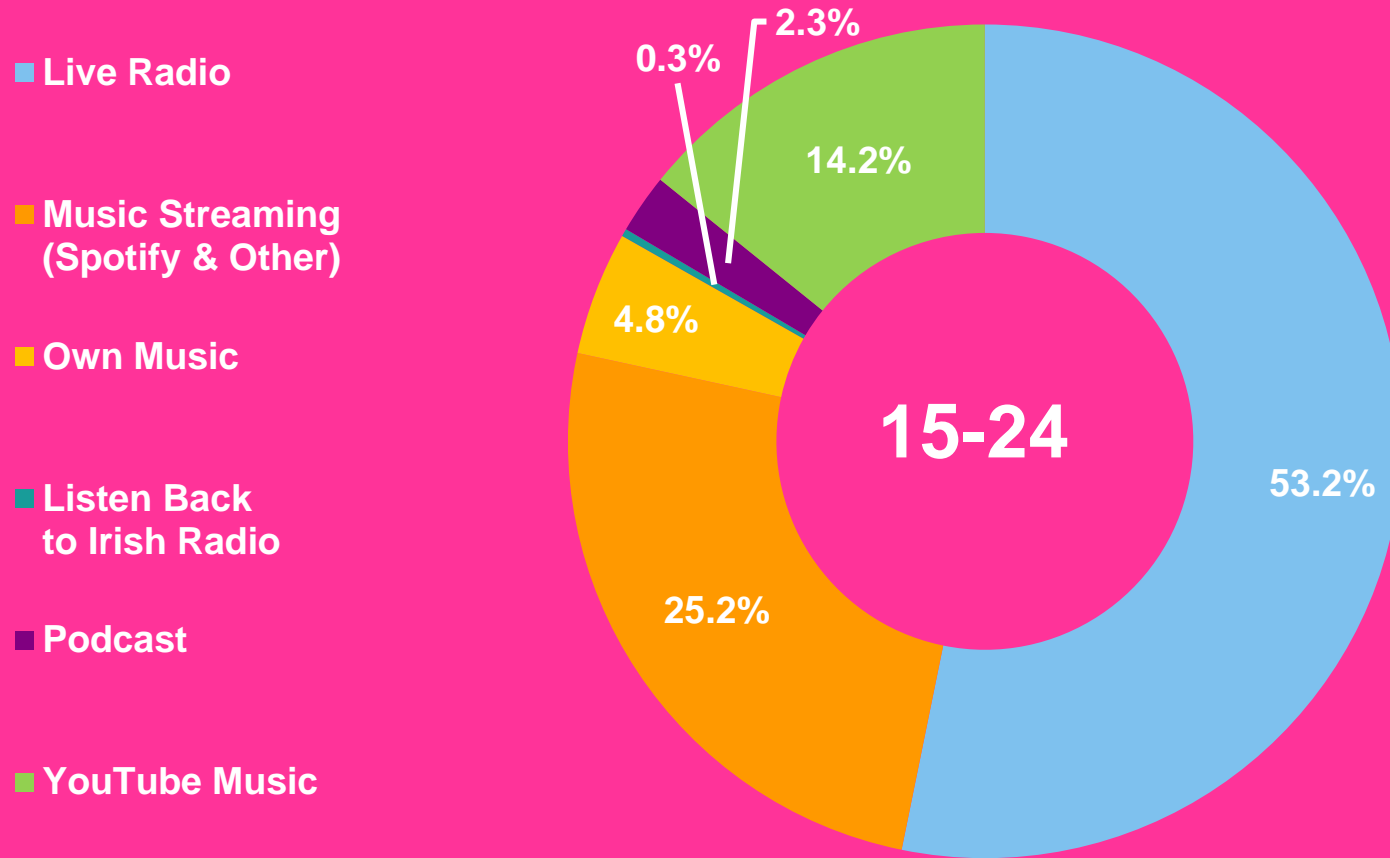
# Share Of Audio Time Spent Daily



**78.8%**  
*Live Radio*  
Share


While many tune in to on-demand audio, they spend a lot less time than listening to *live* radio

# Share Of Audio Time Spent



**Among the 15-24 year olds, radio engages more time than any other audio, more than twice the time spent on Spotify/or similar streaming services**

# Audio – Estimated Share of Time Spent Daily

	15+	15-24	25-44	45-64	65+
	%	%	%	%	%
<b>Live Radio</b>	<b>78.8</b>	<b>53.2</b>	<b>71.0</b>	<b>88.7</b>	<b>95.9</b>
<b>Music Streaming (Spotify &amp; Other)</b>	<b>10.0</b>	<b>25.2</b>	<b>14.0</b>	<b>4.4</b>	<b>0.5</b>
<b>YouTube Music</b>	<b>6.0</b>	<b>14.2</b>	<b>8.2</b>	<b>2.9</b>	<b>1.0</b>
<b>Own Music</b>	<b>2.8</b>	<b>4.8</b>	<b>3.7</b>	<b>1.7</b>	<b>1.6</b>
<b>Any Podcast</b>	<b>1.7</b>	<b>2.3</b>	<b>2.7</b>	<b>1.3</b>	<b>0.4</b>
<b>- Irish Radio Podcast</b>	<b>0.5</b>	<b>0.4</b>	<b>0.7</b>	<b>0.7</b>	<b>0.1</b>
<b>- Other Podcast</b>	<b>1.2</b>	<b>1.9</b>	<b>2.0</b>	<b>0.6</b>	<b>0.3</b>
<b>Listen Back to Irish Music</b>	<b>0.6</b>	<b>0.3</b>	<b>0.3</b>	<b>1.0</b>	<b>0.5</b>

# Notes on Report

- This report is sourced from JNLR data collected in Quarter 4 2020 (October and December) and completed in Quarter 2 2021 (May and June), in the weeks when Covid-19 restrictions were relieved and face to face fieldwork was allowed. \*
- The data in this report is based on a large national sample of 3,100 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 5-8 is based on the core interview (question 3 to 5) drawn from this sample of individuals. These charts are presented to provide an interim update on key radio metrics until the standard report can be delivered in Quarter 4 2021. This relates to 'any radio' listening.
- Data on the broader audio market is based on the JNLR *Media Module*, conducted in tandem with the core interview during this period. This relates to 'live radio' listening.
- The in-home, face to face, methodology ensures inclusion of all age and regional cohorts and both offline and online communities.

\* Due to Covid-19 restrictions face-to-face interviewing was suspended in late October, in November and from January to April inclusive.