An Roinn Turasóireachta, Cultúir, Ealaíon, Gaeltachta, Spóirt agus Meán
Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media

IRISH LANGUAGE YOUTH RADIO
A Research Report

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CONTENTS

1 EXECUTIVE SUMMARY

This report contains the findings of Phase 1 of a two-part research project which aims to explore the views of a national representative sample of the 15-34 age group in Ireland, in relation to a proposed youth Irish language hybrid radio service. The report includes a review of published secondary data into the Irish radio market (JNLR data) combined with the analysis of a be-spoke quantitative survey carried out among the target group.

In evaluating the concept of a youth Irish language radio service, the survey identifies a significant level of expressed interest in the proposed new station, if the correct conditions are met - these conditions being, a station that plays *more* of the *right* music, covers issues that are important to the target group and, potentially is ad-free. Furthermore, published data tells us that the youth market is highly engaged with audio content and that radio is still the leading format among audio content providers. However, the radio market is extremely competitive, and listeners have a finite capacity of time available to listen. Therefore, any new radio station would need to work hard to identify with the target audience, to attract listeners from their established portfolio of stations. While the language does not appear to be a barrier on paper, in reality it will likely place some constraints on the potential attractiveness of the station across the general market. With that said, the findings of the research can be interpreted as an openness to, interest in and perhaps willingness to try-out, a new Irish language station, rather than any guarantee of station reach and loyalty, post launch.

The findings of the survey show a majority of the target market have a favourite radio station (identified as their *most listened to* station). In common with published JNLR data, youth radio, defined in this instance as those stations purposely licenced to target the youth market, emerges in the top position in response to this question. Unquestionably, the main driver of station choice is music -– more than half (53%) state that the music is the **one** thing they like most about their current station of choice.

When the proposed concept of a new Irish language service was described - one that would be *music driven, playing the music and covering content that is popular with a youth audience*, a reasonable proportion (38%) said they would be likely to listen (by listening we mean tuning in at least once a week). However, when prompted with specific criteria, presented as ways by which a new station might differentiate itself from other available youth stations, the level of interest does appear to increase. Once again, music emerges as the key 'must-have' criterion for listeners, with four-in-five agreeing that *a station that plays more of the music you like than any other station*, would make them more likely to listen. And two-thirds of the sample are more likely to listen *if the station talks about the issues that matter to them*. Following the prompting and evaluation of these specific criteria, likelihood of listening to the new station was measured again and now seven-in-ten say they are likely to listen, either very or somewhat likely. While this is a very positive reaction, it must be interpreted with caution and considered against the backdrop of radio industry trends and listening behaviours and within the constraints of Irish language ability/comprehension among the target market.

Currently, JNLR data shows that almost nine-in-ten individuals aged 15-34, (87%) listen to the radio on a weekly basis, equating to almost 1.1 million young listeners. This reflects a sustainable position for a traditional medium, particularly in the context of the broader audio market where radio competes with digital, on-demand audio formats. Generally, music driven stations achieve the highest audience reach among this particular age group, a fact which once again underlines the importance of the music offering to this market. Over the last five years, the weekly listening trend shows a drop of 3% points, a relatively slow pace of change. However, on the measure of daily listening the downward trend is somewhat more acute with a drop of 8% points in the same five-year time frame, bringing the daily audience figure to 69%, still a significant majority of the youth market. Furthermore, young radio listeners maintain a significant level of engagement on a daily basis, tuning in for more than three hours each day.

In the broader audio market, including radio and on-demand digital content, data published by JNLR shows that there is almost universal engagement among this age group – 98% listened to some audio content in the past (average) week. Live radio continues to be the dominant format followed by music streaming and YouTube for music. Only one-fifth of this age group listen to their own music archives weekly and trends show that the growth in music streaming has been primarily at the expense of such personal music archives rather than at the expense of radio. There has also been significant growth in podcasting in recent years among this age group – currently 35% listen on a weekly basis. While audience reach data shows significant levels of listening to digital audio formats (streaming, podcasting etc..), on the measure of time spent listening we see that live radio maintains the majority share of minutes listened daily in the audio market (52.1%).

In summary, radio appears to be in a reasonably healthy position in 2022. However, it is a competitive space and any new broadcast service will need to disrupt the status quo in its effort to attract the attention of the target market and encourage trial of the new station. In this context, the findings of the research show a positive level of interest in the proposed radio service concept. The language, on paper, does not seem to be a barrier once the music and content hit the right notes!

2 BACKGROUND & METHODOLOGY

The BAI, in its strategy statement, has set out its commitments to foster and promote quality Irish language programming with a particular focus on content for young people.[1] Already, BAI has awarded broadcasting contracts for the provision of two Irish radio language services – Raidió na Life, a Dublin community interest station and Raidió Rí Rá, a digital radio and FM[2] service targeting a youth audience. Furthermore, in partnership with Foras na Gaeilge, the advisory body in relation to the Irish language, the BAI has established an Irish language Advisory Committee whose aim is to support the implementation of the BAI's Irish Language Action Plan.[3]

As part of its workplan in 2021, the Committee undertook to explore the potential for a youth-driven Irish language hybrid (FM and digital) service for radio. To further this aim, the BAI, Foras na Gaeilge and the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media co-commissioned a two phased quantitative (Phase 1) and qualitative (Phase 2) research project.

Phase 1 research would explore the views of a **national representative sample of the 15-34 age group** in Ireland on a range of topics and questions relevant to demand for, content of, and access to, an Irish language hybrid service.

Phase 2 research would explore the views of the **intended core audience of the service** i.e., native and fluent Irish speakers and/or those with a very good competency in Irish who would access Irish language media on a regular basis (aged 15-34) on the same topics as well as exploring in more detail the type of content that this age group want from a radio service. Phase 2 research is being undertaken by Bricolage.

This report contains the findings of Phase 1. Ipsos's proposed approach focused on the quantitative aspect and addressed the requirement to conduct research among a nationally representative sample of the population aged 15-34. A short be-spoke survey among young people via Ipsos' national Omnipoll telephone survey was undertaken. To achieve a robust sample among the target market the survey was carried on two waves of Omnipoll. Almost 600 interviews were achieved.

In conjunction with this phase of primary research a supplementary phase comprised a review of relevant published/secondary data. This secondary data was gathered from the JNLR published radio data and JNLR Irish audio reports. These archives facilitated an analysis of current radio listening patterns, and comparisons with trended data, and provide a picture of radio's position in the broader audio landscape.

[1] The BAI's Strategy Statement can be found at www.bai.ie

[2] The provision on FM is facilitated by temporary broadcasting contracts pursuant to section 68 of the Broadcasting Act 2009.

[3] The report of the Irish Language Advisory Committee for 2021 can be found at www. bai.ie

3 FINDINGS

As part of this project an analysis of JNLR data was proposed to provide context and understanding of the current radio environment in Ireland. This analysis will support the findings of the bespoke survey in terms of assessing the interest in and potential viability of a new youth Irish language radio station.

JNLR is the industry radio listening survey that measures listenership to all public and commercial radio in Ireland. The project involves a large national survey, across all radio franchise areas in the country, among adults in Ireland (aged 15+). The survey is conducted throughout the year, across twelve months of the year, and typically, c16,800 interviews are conducted each year. *

In line with the objectives of this current project, the focus of the JNLR analysis is the listening behaviour of the younger 15-to-34-year age cohort.

3.1 The Radio Environment in Ireland – JNLR Data

JNLR data is analysed here to review both the current position of radio among the target market and includes a trend analysis in listening patterns over the past number of years. The key metrices measured in the JNLR survey include the daily reach and share of radio generally and, of Irish radio stations and programmes, in particular. There is also reporting on weekly listening activity.

Overall, across the whole population, radio remains in a very positive position in 2022. Currently, four in every five individuals in Ireland, aged 15 years and over, (79%) listen to radio every day. This increases to 91% on a weekly basis - almost universal listening among the population. Radio has experienced some loss in audience levels over the years, but at an overall level, at a relatively slow pace. This is quite a remarkable record when considering the changes in the media environment, with the emergence of social media platforms and the accessibility of online, on-demand, visual and audio content.

It is among the younger audiences where, arguably, changes in listening behaviour are most apparent.

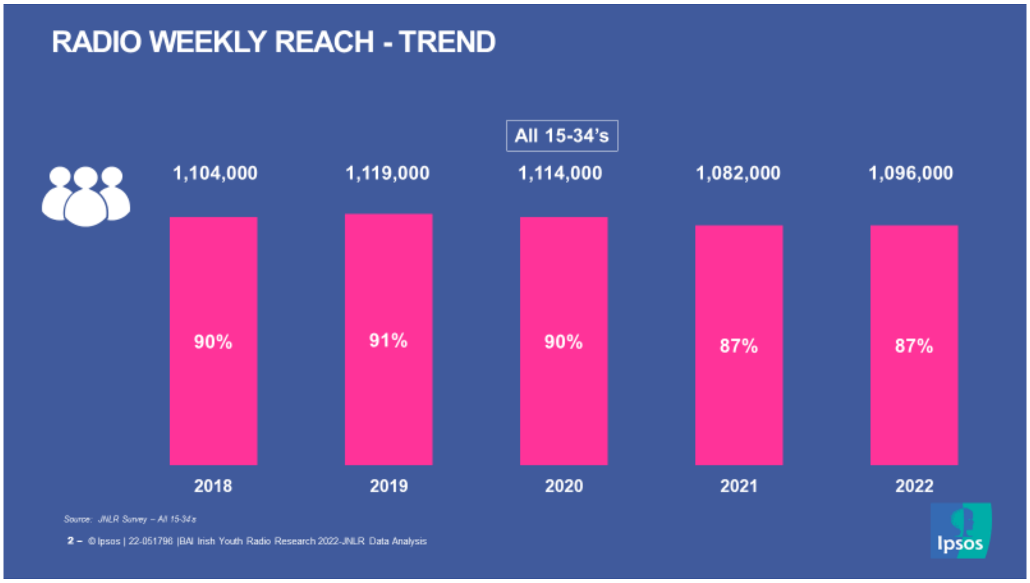
**The Covid Pandemic interrupted fieldwork in 2020 and 2021, so sample size was somewhat reduced in those years.*

3.1.1 JNLR and The Youth Audience

Looking specifically at the younger 15-34-year-old segment, the chart below illustrates a brief overview of the current position of radio among the target market. Currently, almost nine-in-ten individuals (87%) listen to radio on a weekly basis. While this is somewhat lower than the national *All Adults* average it is still a huge proportion of the target population and equates to almost 1.1 million young people tuning into radio each week. Seven-in-ten (69%) listen to radio on an average week-day, and this daily audience tunes in for an average of 3 hours and 22 minutes per listener.

Furthermore, at the weekend more than half the target population listen to radio on Saturdays (58%) and on Sundays (52%). This reflects a significant engagement in the medium, among this audience.

The recent trend shows a drop of 3% points in weekly listening levels to radio over a five-year period, from 2018 to 2022, reflecting a relatively slow pace of change.



In terms of daily engagement, seven in ten individuals (69%), aged 15-34, listen to radio every weekday. Again, a very positive position for radio. However, over time there has been a greater loss in the daily audience reach compared to weekly reach – since 2018, a drop of eight percentage points. This suggests that while the youth audience remains very engaged with radio, there is somewhat more pressure on maintaining audiences every day.

The youngest cohort of this target population report the lowest levels of daily listening overall, and also, the biggest change since 2018. 63% of 15–19-year-olds listen daily, down from 75% in 2018. We will see later in this report, that the younger groups are more engaged than average in competitive audio formats.

RADIO DAILY REACH X AGE GROUP

Radio Daily Reach	2018	2019	2020	2021	2022
	%	%	%	%	%
All 15-34	77	74	72	70	69
15-19	75	71	68	66	63
20-24	77	73	69	71	69
25-34	78	75	75	73	71

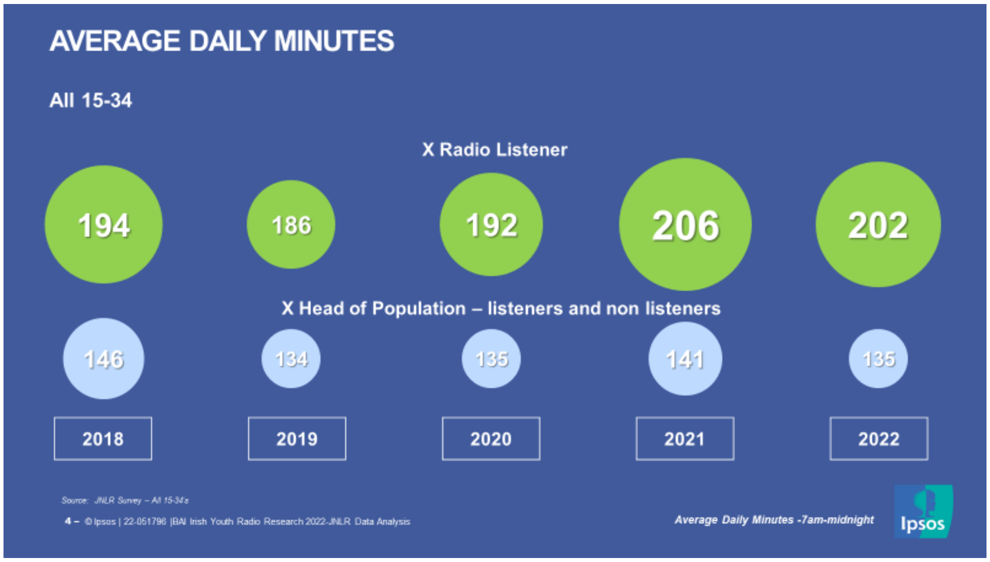
Source: JNLR Survey – All 15-34's

3 – © Ipsos | 22-051796 |BAI Irish Youth Radio Research 2022-JNLR Data Analysis

However, despite some erosion in audience levels over time, radio listeners in this age cohort engage with radio for a significant amount of time each day - currently, 3 hours and 22 minutes on average, (202 minutes) each day. This is an increase of 8 minutes compared to 2018 – so while there may be somewhat fewer listeners, a little more time is spent.

Following the pattern seen with daily reach, the number of minutes listened currently ranges from 163 minutes by 15-19-year-old listeners, to 224 minutes by 25-34's.

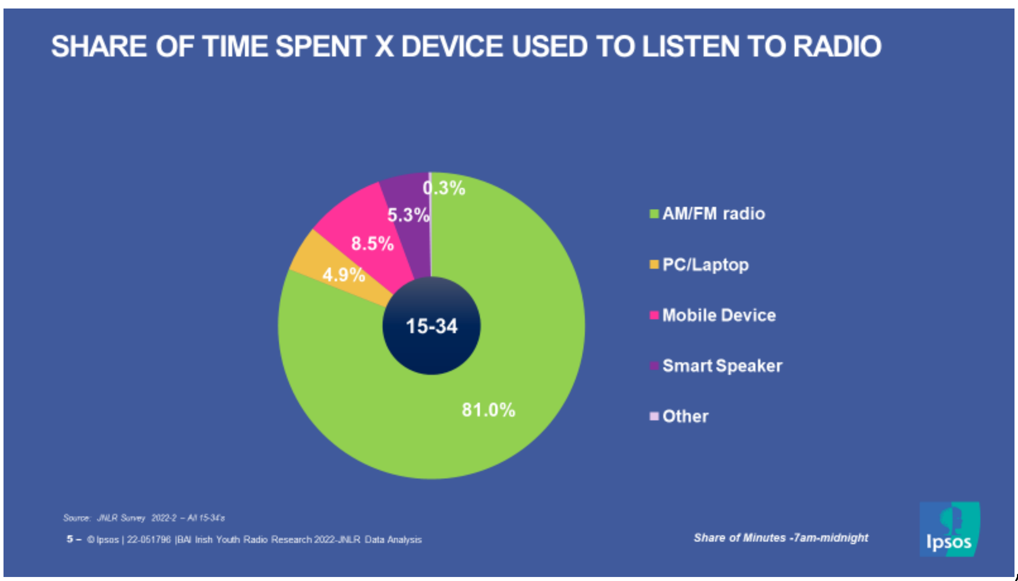
As a measure among the 15-34-year-old population, including listeners and non-listeners, time spent listening equals 135 minutes each day per person in the population and shows a drop of 11 minutes since 2018, mirroring the trend in radio reach (as shown above). To put this in context of the total population aged 15+, the average minutes listened per person in the population (listeners and non-listeners) is 200 minutes.



Listeners in this age group are listening to a mix of stations. Across the country, almost three-in-ten (29%) listen to a national radio station each day. (Unsurprisingly the music-oriented stations, 2FM and Today FM, emerge with highest reach among the national stations). More than half, 52%, listen to a regional or local station daily. Outside of Dublin and Cork, the regional stations combined, targeting a youth audience (Beat FM, Spin South-West and iRadio), reach 33% of this audience each day. In Dublin and Cork, the stations with the highest daily reach are also those with a youth licence – Spin 1038; Red FM and to a lesser degree, FM104.

3.1.2 Devices Used to Listen to Radio – JNLR Data

In the radio market, despite the varied choice of devices available to listen, the majority of this cohort continue to tune in on an FM radio device (at home or in the car) on a daily basis. In terms of time spent listening, 81% of all minutes listened are on an FM radio and 19% on a digital device. This percentage for digital devices includes 8.5% of minutes on a mobile device, 5.3% on a smart speaker such as Alexa or Google Home and 4.9% on a pc/laptop. Generally, more time is spent by this group listening on digital devices compared to the total 15+ population, where the comparable digital share equals 10%.

,,

Alongside ownership of technology, the use of digital devices to listen to radio is growing – in 2018 digital devices represented 10.5% of time spent listening to radio, reflecting a change of +8.5 percentage points. This enduring use of the FM radio at home or in the car perhaps reflects the easy access to radio on a more traditional device, and the comfort or ease of listening to content in an undemanding or relatively passive manner. And of course, commercial radio stations in Ireland did not switch over to DAB during the trial phase.

3.2 The Audio Market in Ireland – JNLR Data

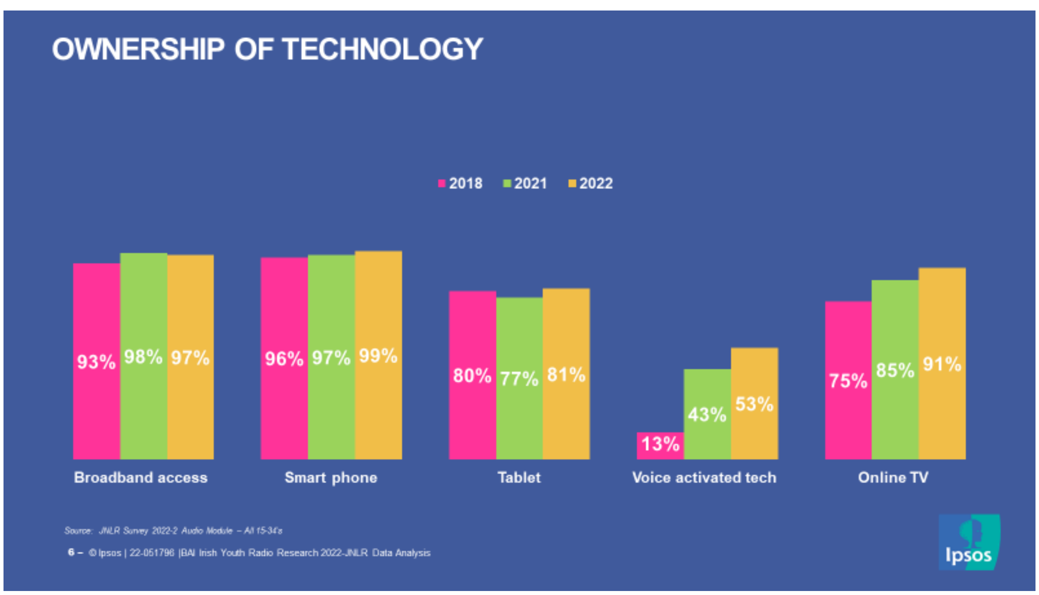
As part of the JNLR survey, a special module on the broader audio market is included in the survey for one designated quarter of fieldwork. In 2022, this module was conducted in Quarter 2, April to June 2022. The audio module is designed to provide some insight into the behaviour of audiences in this environment and to better understand where radio fits within the competitive set. In the context of the survey, the competitive set includes *live* radio, listen back to radio, music streaming, YouTube for music, '*own'* music (e.g., CD's, vinyl, downloads) and podcasting.

Before identifying the listening patterns to the various formats, an initial question on technology ownership was put to respondents which allows us to better understand the environment of this group and to put the behavioural data in context.

3.2.1 Technology Ownership

Young people are highly connected in terms of technology. There is universal ownership of smart phones and almost all have broadband access. Currently, just over half (53%) have a smart speaker such as Alexa or Google Home. This smart speaker technology is the one where we see the biggest growth in the last number of years, +40% points, compared to 2018. Ownership of technology facilitates access to audio content.

While this part of the survey focused on Audio formats, a question on subscription to on-demand video services was included in this section. This provides some indication of activity in the parallel market of video content, a market competing for share of time with Irish audiences, particularly younger audiences. Data shows that 91% of young people have an online TV service such as Netflix or Disney+, plus 16% points compared to 2018.

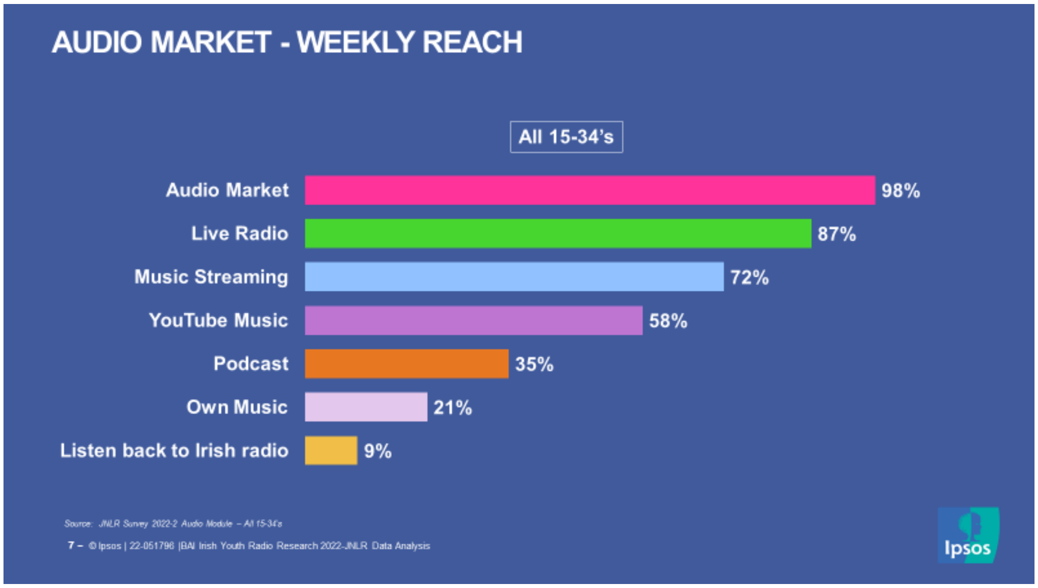


3.2.2 Audio Market – Weekly Listening Patterns

In terms of listening behaviour, there is almost universal engagement across the general population in the audio market on a weekly basis. This is true too of the 15-34-year age group – 98% of this group listened to some audio format in the past week. *Live* radio is the dominant format with 87% of the target group tuning in to listen to *live* radio on a weekly basis.

Taking all digital formats together (excluding 'own music'), a similar proportion (87%) listen to some on-demand, online, audio on a weekly basis. Music streaming (for example Spotify or similar) is the next most listened to format (72%) after radio and is followed by YouTube for music (58%). These formats are even more popular among the younger 15–24-year-olds.

One-fifth of this group still listen to their own archived music (*own music* described as CDs, vinyl and digital tracks).



As seen earlier through the JNLR data, *live* radio has experienced a drop in listening over recent years but at a very slow pace, particularly on the metric of weekly (past week) listening. However, in the same time frame, there has been a relatively rapid growth in music streaming audiences (+29% points). Most importantly, the growth in music streaming is not achieved at the expense of radio – in fact, streaming has, over time, supplanted '*own music'* archives, currently 21% weekly listening, (-35% points). Technology has accelerated the change in how young people consume their own music, more and more choosing streaming technology instead. This pattern is repeated across the total population, although the pace of change is more acute among the younger group.

The other format showing significant growth is podcasting – more than one-third of the target population (35%) currently listen to a podcast on a weekly basis, (+20% since first measured in 2019). 27% listen to an Irish podcast and 22% to an international one. The proportion listening to YouTube for music (58%) is, more or less, unchanged over the past four reports. Only one-in-ten listen back to an Irish radio programme and this proportion has remained stable over time.

AUDIO MARKET - WEEKLY LISTENING TREND

All 15-34's

ALL 15-34's	2018	2019	2021	2022
	%	%	%	%
Live Radio	92	88	88	87
Music Streaming	43	52	68	72
YouTube Music	n/a	59	60	58
Own Music	56	54	28	21
Listen Back	n/a	9	8	9
Any Podcast	n/a	15	27	35

Source: JNLR Survey Audio Module – All 15-34's

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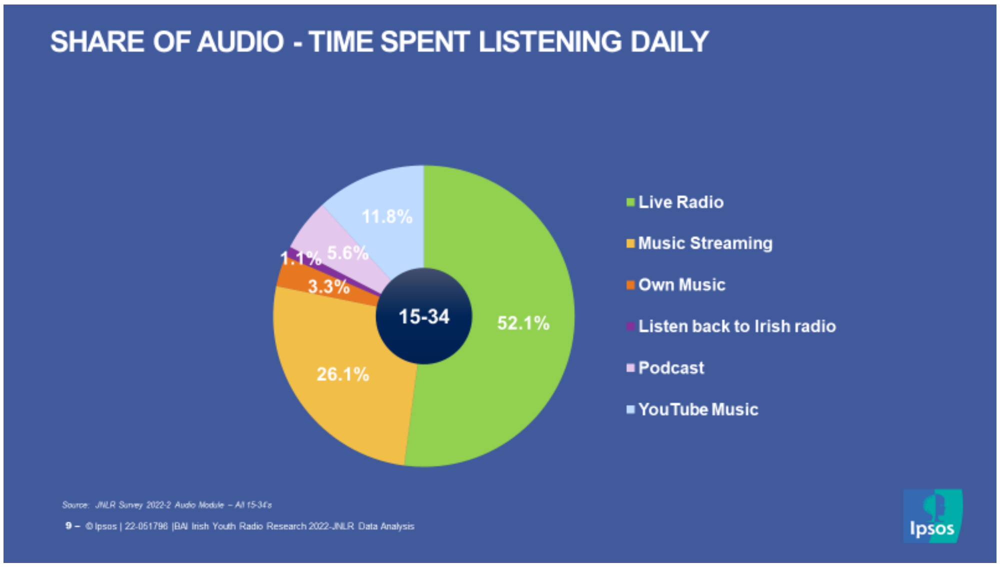
Among regular podcast listeners (weekly listeners) the Top 5 most popular genres of podcast are as follows:

- Music (38%)
- Comedy (34%)
- Sport (30%)
- Entertainment (radio, TV, gaming etc.) (24%)
- Documentaries (20%).

Other areas of interest are Health and Well-being, News, Politics and Current affairs, Lifestyle and Fitness.

3.2.3 Audio Market – Share of Time Spent Listening

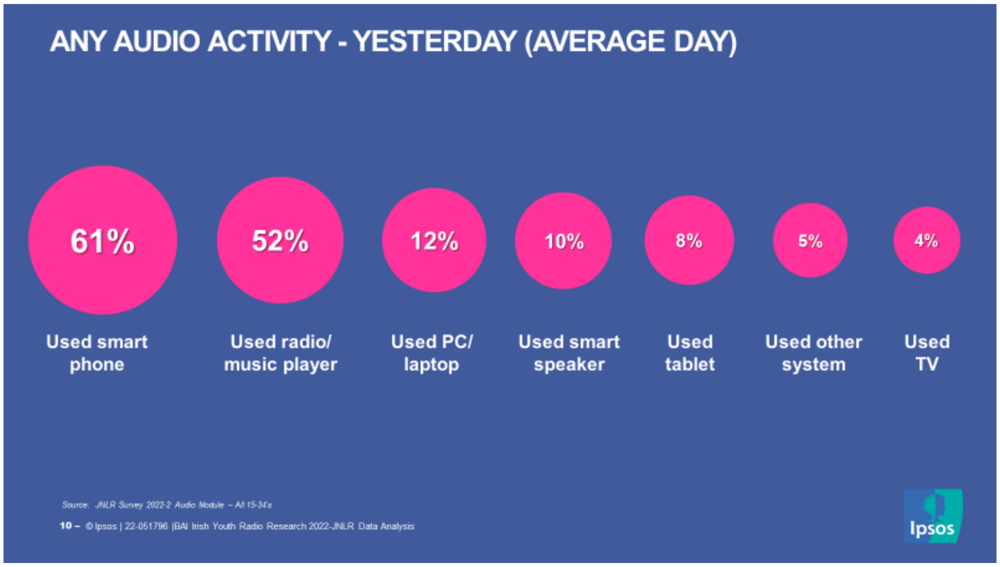
The interview moved on to focus on yesterday (daily) listening and respondents estimated time spent listening to various audio formats. While reach data shows more than half of the target group listen to music streaming yesterday (average day), on the measure of time spent listening a different picture emerges.



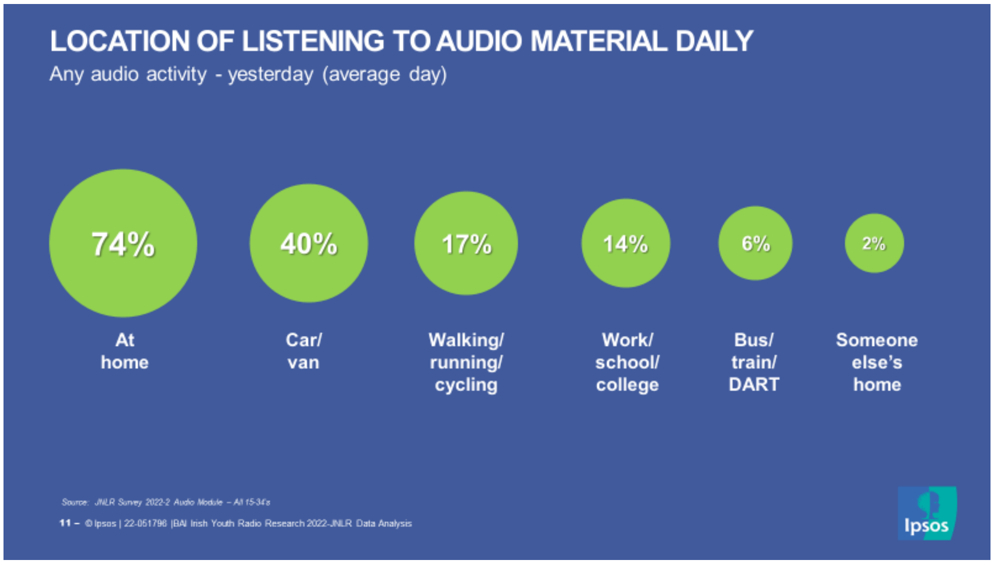
On this measure live radio achieves the majority share position with 52.1% of time spent listening. Music streaming achieves a share of 26.1% and YouTube for music, 11.8%. Although this data reflects a drop in *live* radio share since last reported in 2021 (down 6.6% points) it shows that while on-demand formats are popular and attract sizable audiences, in terms of engagement, these formats still lag behind live radio.

3.2.4 The Audio Environment

Among this youth market the most used device for Audio material is the smart phone – 61% used the smart phone *yesterday* to listen (+9% points compared to 2021). Just over half (52%) used a radio/music player. The smart phone is used particularly for on-demand formats, most of this activity coming from music streaming. A small proportion of this age group listen to live radio via the Smart phone (13%).



Irrespective of format, most listening activity happens at home. Three-quarters of this group (74%) listened to audio content at home yesterday (average day). This is the same proportion as in the general population (aged 15+). 40% listened in the car, the second most used location among this group (again a similar proportion to the general population). Younger people listen to audio content more than average when out walking/cycling or running (17%) and when at work/school/college (14%).



Live radio is the biggest format in the car environment - 34% of this age group listened to radio in the car. When out walking/cycling 11% are listening to music streaming and 5% *live* radio.

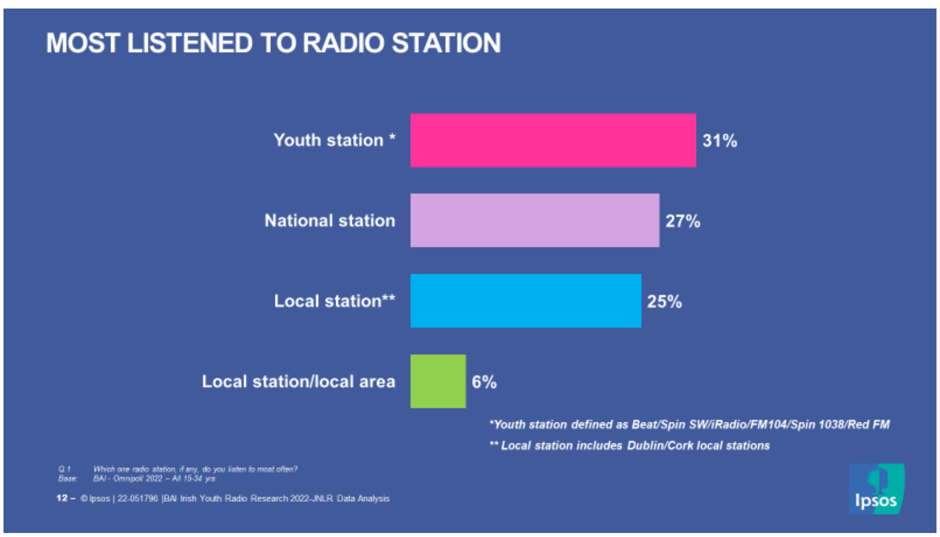
When reviewing this location data, it is useful to keep in mind the mode of transport used most often for commuting/getting around. A question asked in 2021 shows that 74% of the 15-34 age group use a car, as either driver or passenger, compared to 9% who use public transport and 14% who walk.

3.3 Irish Language Radio – A Proposed Youth Station

BAI commissioned a stand-alone study to measure the reaction to a proposed new Irish language radio station specifically targeted at a youth audience. This short survey was conducted via Ipsos' syndicated Omnipoll service, targeting a sample of 15-to-34-year-olds throughout the country. The survey is undertaken by telephone interview. The findings are to be reviewed in the context of the radio behavioural and environment data gathered from the core JNLR survey and the Audio Module.

3.3.1 Current Listening Patterns and Drivers of Station Choice

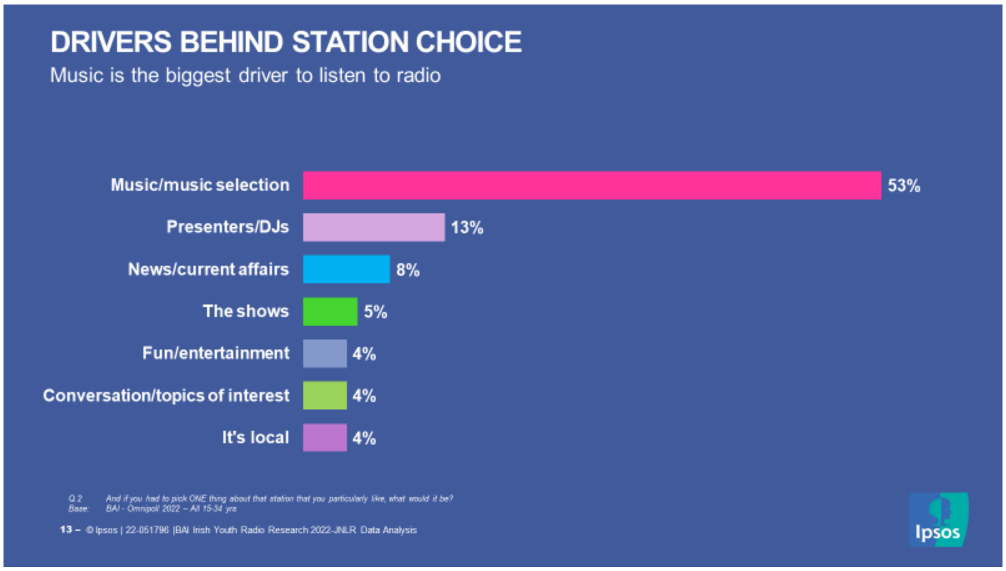
To set the scene, respondents were initially asked about their current listening patterns. Three quarters of the target sample identified their *most listened to* station at the outset of the interview. While the question is not identical to JNLR, this seems to be a fair representation of radio listening activity from what we know about the radio market. Not surprisingly, youth radio* emerges in the top position in terms of most listened station – 31%. National stations, led by RTE 2FM and Today FM are in next place with 27% of mentions followed by local stations at 25%. (In the case of local stations, this data includes all Dublin and Cork local stations, therefore there is some overlap with youth stations mentioned above). Local stations in local areas are mentioned by 6% of respondents.



**Youth radio in this context includes Beat/Spin SW/iRadio/FM104/Spin 1038/Red FM*

Among this cohort of the population, music is the biggest driver to listen to the station of choice. Whether that is music in terms of the selection played on the radio station, the amount or volume of music played or the genre of music that suits, music is the most often mentioned reason for listening.

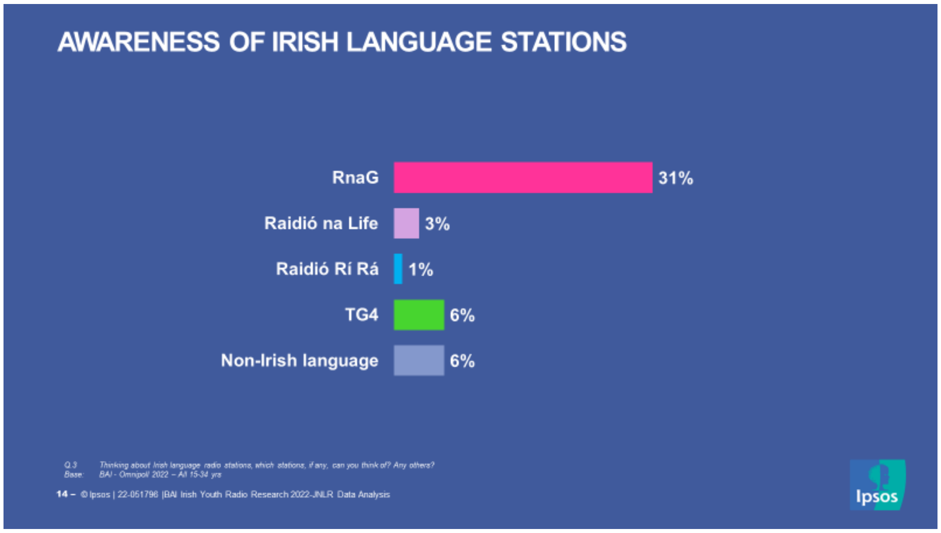
When asked to name the **one** thing they particularly like about their station of choice, just over half of respondents (53%) mention music. Following in a distant second place, just over one-in-ten (13%) mention the presenters in general and in some cases name particular personalities that they like. The news, the shows, fun and conversation emerge, but to a lesser degree. (However, these motivations are mentioned to a greater than average degree by the older 30-34 group.) Overall, among the 15-34 group generally, non-music content is likely considered and enjoyed as continuity in between the music.



3.3.2 Awareness of Current Irish Language Stations

The interview moved on to establish the level of awareness of Irish language stations. A relatively substantial proportion, 31%, identified Raidió na Gaeltachta spontaneously. Only 3% mentioned Raidió na Life and 1% Raidió Ri Rá. Although the questions specifically referred to radio, a small proportion 6% mentioned TG4 and a further 6% mentioned other radio stations that are non-Irish language, likely reflecting the use of some Irish spoken content on mainstream radio stations.

Almost one-in-ten say they listened to Raidió na Gaeltachta in the past week. This is considerably higher than emerges on JNLR so perhaps would be best interpreted as listening in the past few weeks. It does however indicate that there is a small proportion who have been exposed to the national Irish language station at some point. Only 1% listened to Raidió Rí Rá and less than 0.5% to Raidió na Life. In relation to the latter two stations, it must be remembered that Raidió na Life has a limited broadcast range – within an 8km radius in Dublin City and Raidió Rí Rá is not available on FM on a full-time basis. These facts will have some bearing on the research findings.



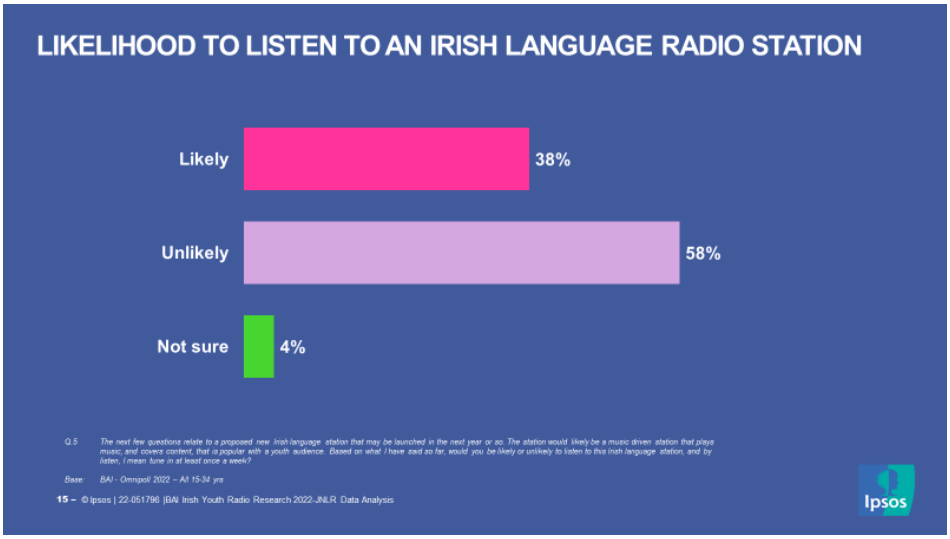
3.3.3 Reaction to Proposed Youth Irish Language Station

The interview moved on to probe specifically the concept of the proposed new language station. In the context of a broad description provided,

> *"The station would likely be a music driven station that plays music, and covers content, that is popular with a youth audience"*

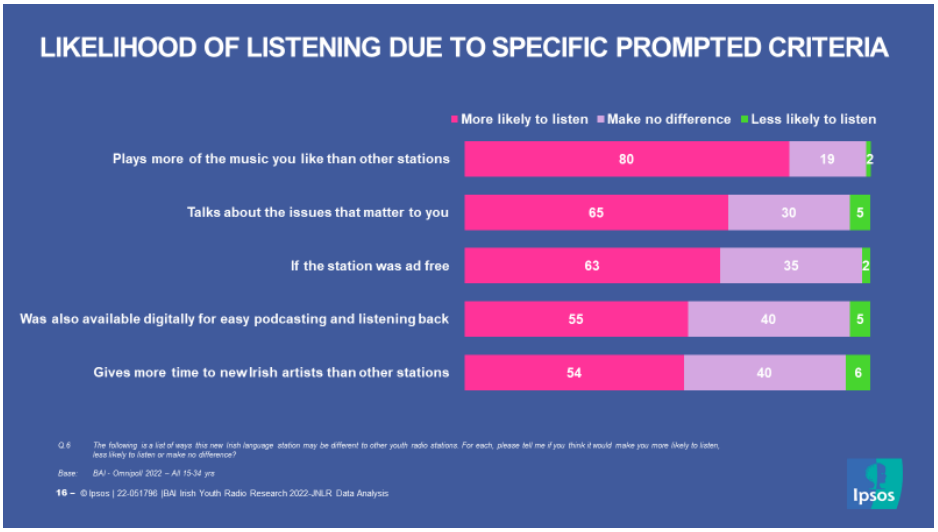
almost two-in-five (38%) said they would be likely to listen. Listening in this instance was defined as tuning in at least once a week.

Those with some proficiency in Irish are even more likely to listen, while those with no Irish language skills are more unlikely to listen than average. Breaking out the 38% in more detail, 13% say they are *very* likely to listen and 25% *somewhat* likely to listen. On the other end of the scale, 40% are *very* unlikely to listen.



However, a more positive reaction emerges when respondents are prompted with specific criteria presented as ways in which a new Irish language station might differ from other youth stations. Five criteria were prompted, and respondents considered each one in terms of whether it would make them more or less likely to listen, or would it make no difference to their inclination.

Broadly, these areas of potential differentiation are appealing across the board, but once again, music emerges as the key ingredient to attract listeners – four-in-five agreeing that a station that *plays more of the music you like than any other station*, would make them more likely to listen. Two-thirds of the sample are more likely to listen if the station *talks about the issues that matter* to them.

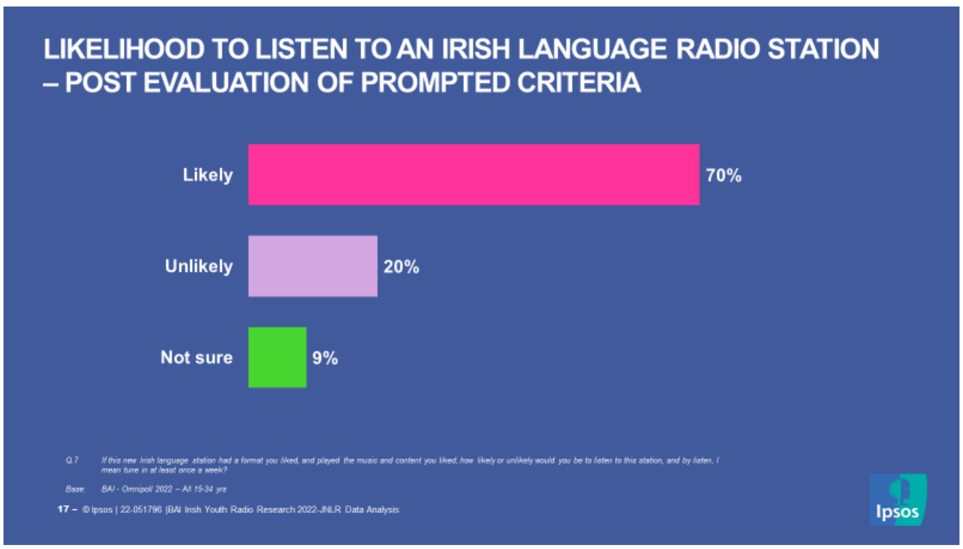


In general, the younger 15-19-year-old cohort are more disposed than average to the music and the topical issues and interestingly, if the station were ad free.   And those who already have a good grasp of the language are in higher agreement on all criteria.

Following the probing of these specific criteria the question on likelihood to listen was posed again with the following description,

> *"if this new Irish language station had a format you liked, and played the music and content you liked, how likely or unlikely would you be to listen to the station*".

Now, likelihood to listen increases to 70%. 33% are *very* likely to listen and 10% are *very* unlikely to listen. Those somewhat more disposed than average to the concept are women, 15-19-year-olds, those who already listen to radio and those with Irish language skills.



This is a very positive reaction but should be viewed in light of a broad conceptual idea put forward for consideration. It is no guarantee that a new station would break through with this audience, if launched. We know from JNLR that the radio market is very competitive and that no individual station achieves such high levels of listening particularly in the competitive Dublin and commuter belt/s.   We also see that the amount of time available for listening to audio content doesn't generally expand as new stations or new formats emerge, rather the competitive set re-shuffles to embrace the new entrant.

However, these findings do suggest an openness to the concept of a new Irish language station, and some willingness to try out the station, if such a station broadcast the music and content that appeals to the younger audience.   Indeed, the use of the Irish language in our everyday culture seems to be more topical now than previously and, particularly with the current success of Irish language film in the mainstream cinema, it might be a timely initiative.

Finally, to put more context on the findings, respondents described their own level of ability in the Irish language. Almost three-in-ten (28%) described their ability as *good* – 7%, *very good* and 21%, *quite good*. The youngest group, 15-19- year-olds, unsurprisingly those most likely to be in education, are more likely to claim proficiency than others.