THE IRISH AUDIO REPORT 2023

JOINT NATIONAL LISTENERSHIP RESEARCH

RADIOCENTRE IRELAND

Ipsos

Summary

- Between the ongoing strength of live radio and innovation within on demand audio, audio has never been in such a strong position.
- In terms of recency of listening, there is almost universal listening to audio content in the past week (97.6%) and live radio is the dominant player in this field reaching 91.8% of adults. Listening to on-demand, online audio now reaches 57.4% of the population.
- Irish audiences are connected in the digital world. Ownership of smart phones (92%) and smart speakers (45%) enables easy access to audio content at home or anywhere. The growth in ownership of smart speakers has been relatively rapid (+32% points since 2019).

Summary

- **Most listening to audio content happens in the home with seven-in-ten (69%) listening to audio at home on an average day. However, as the country moves back outside of the home, there has been some increase in listening outside the home - 41% listening in the car and 11% listening to audio while out walking/cycling/running.**
- **On an average day, in terms of time spent listening to audio, live radio has a share of 73.9% of the audio market while on-demand audio has a 26.1% share.**
- **For the younger 15-24-year-old cohort, live radio achieves the largest share of time spent, 44.7% followed by music streaming (Spotify or similar) at 28.5% and YouTube for Music with a 12.7% share.**
- **Almost two-in-five adults pay for a subscription service on one or more online platforms – either audio streaming (ad free), YouTube premium (ad free) or podcasts.**

Contents

Core JNLR Data – A Recap

80.2%

listen to radio on average day

3.3 million

people listening on average day

4 hrs 7 mins

average time spent per listener per day

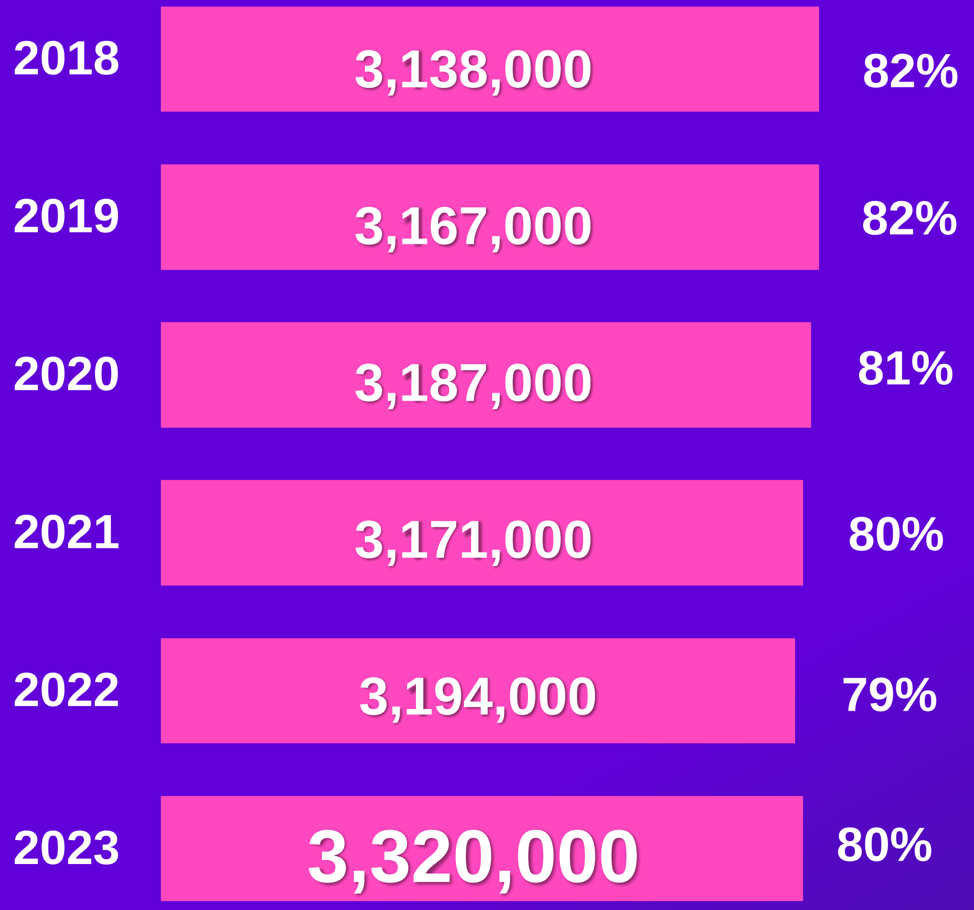
13.4 million

total hours per day

Radio is in a very strong position in 2023. More than 3 million listeners tune in every day, listening for a total of 13.4 million hours.

Source: JNLR 2023-2 Core Interview (Jul '22 to Jun '23 – 12 mth data)
Base: All 15+ - Mins/hours - 7am to Midnight

Radio Reach – Average day



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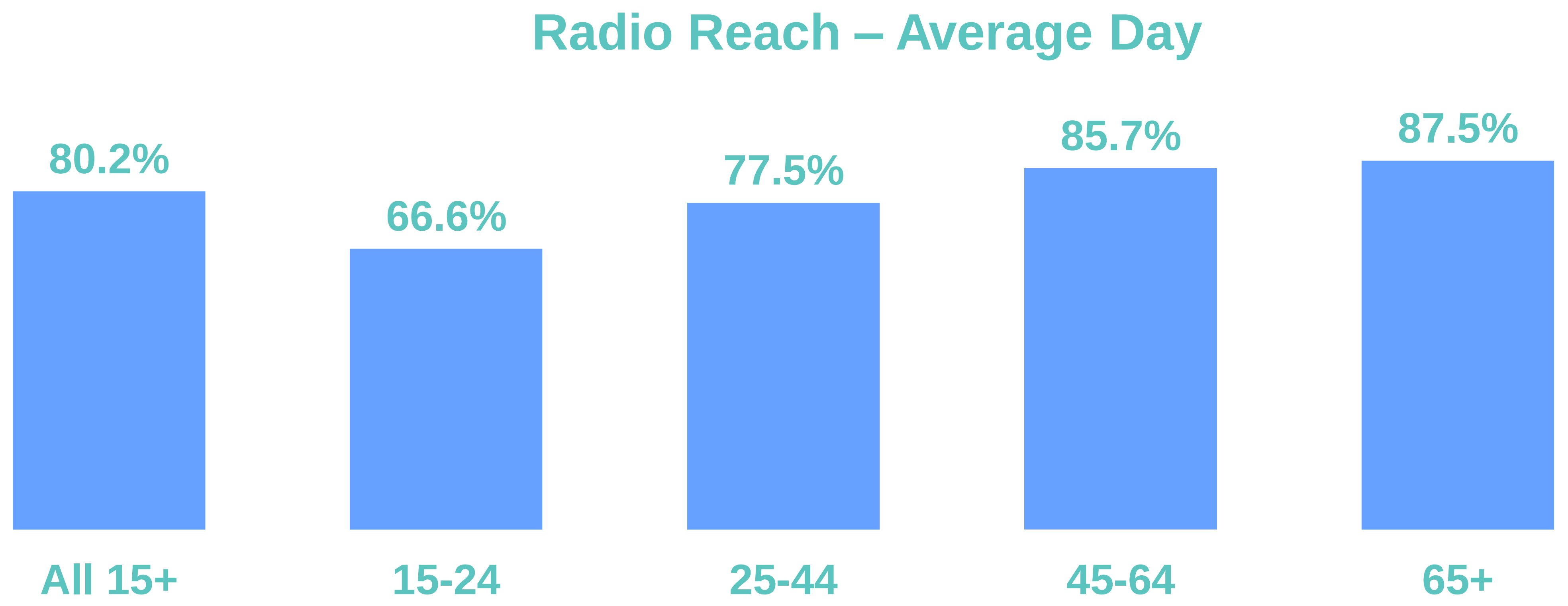
Radio daily audiences have grown over the past 5 years to 3.3 million listeners .

Source: JNLR 2023-2 Core Interview (Jul ’22 to Jun ‘23 – 12 mth data)
Base: All 15+

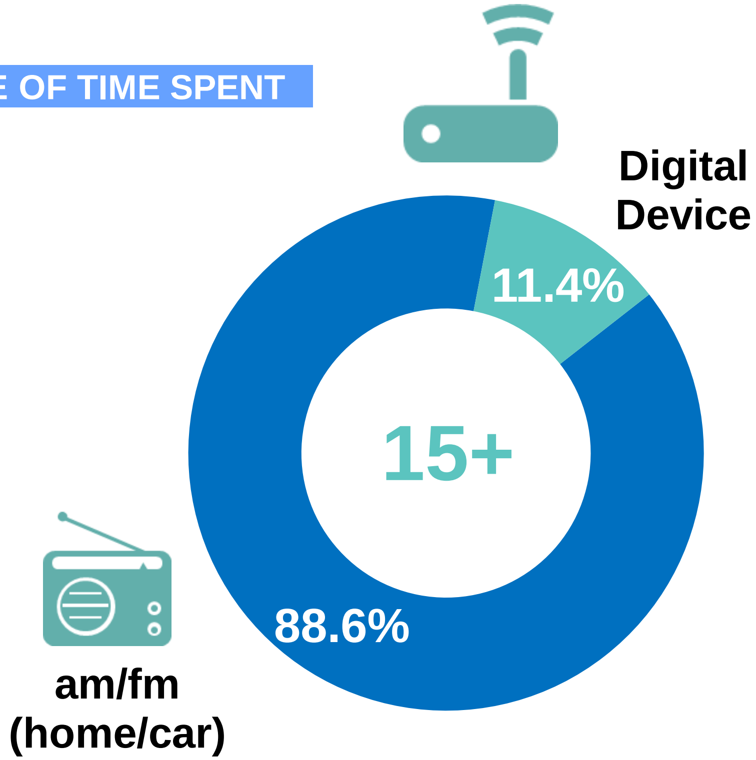
Radio delivers significant reach across all age cohorts.

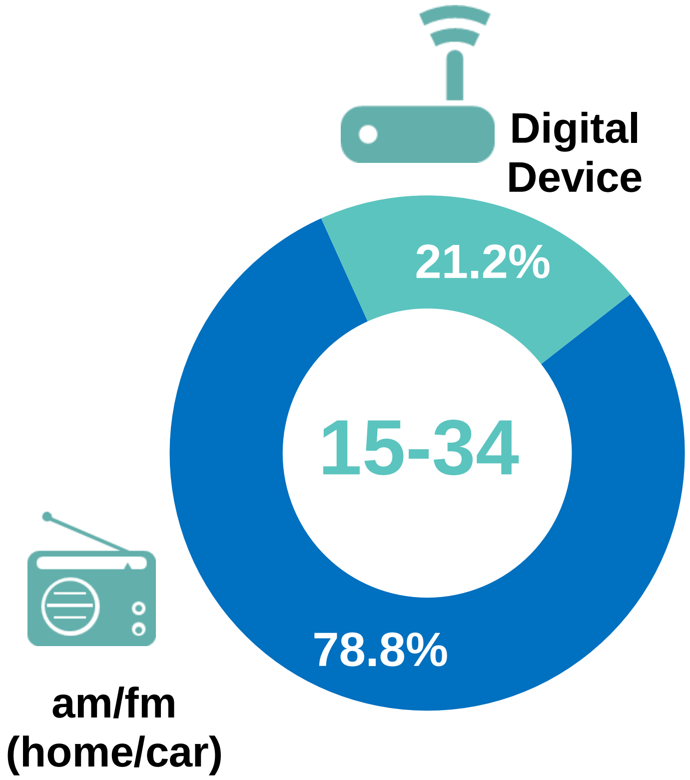


Source: JNLR 2023-2 Core Interview (Jul '22 to Jun '23 – 12 mth data)
Base: All 15+

While most listening to radio happens on the FM radio – more than half million (546,000) listen on digital platforms delivering 11% share of radio minutes on the average day

SHARE OF TIME SPENT





* Based on share of minutes 7am-midnight, to Irish stations

Source: JNLR 2023-2 Core Interview (Jul '22 to Jun '23 – 12 mth data)
Base:

Technology Enables Access

Irish audiences are highly connected

91%
HAVE BROADBAND ACCESS

92%
OWN SMART PHONE

45%
OWN VOICE ACTIVATED TECH/SMART SPEAKER

52%
OWN BLUETOOTH WIRELESS HEADPHONES

Source: JNLR 2023-2 Audio Module (Apr '23 to Jun'23 – 3 mth data)
Base: All 15+

Almost two-in-five (38%) are subscribing to one or other of these online platforms for audio content

33%

Paid Subscription (Ad free)
Audio Streaming
(such as Spotify Premium)

13%

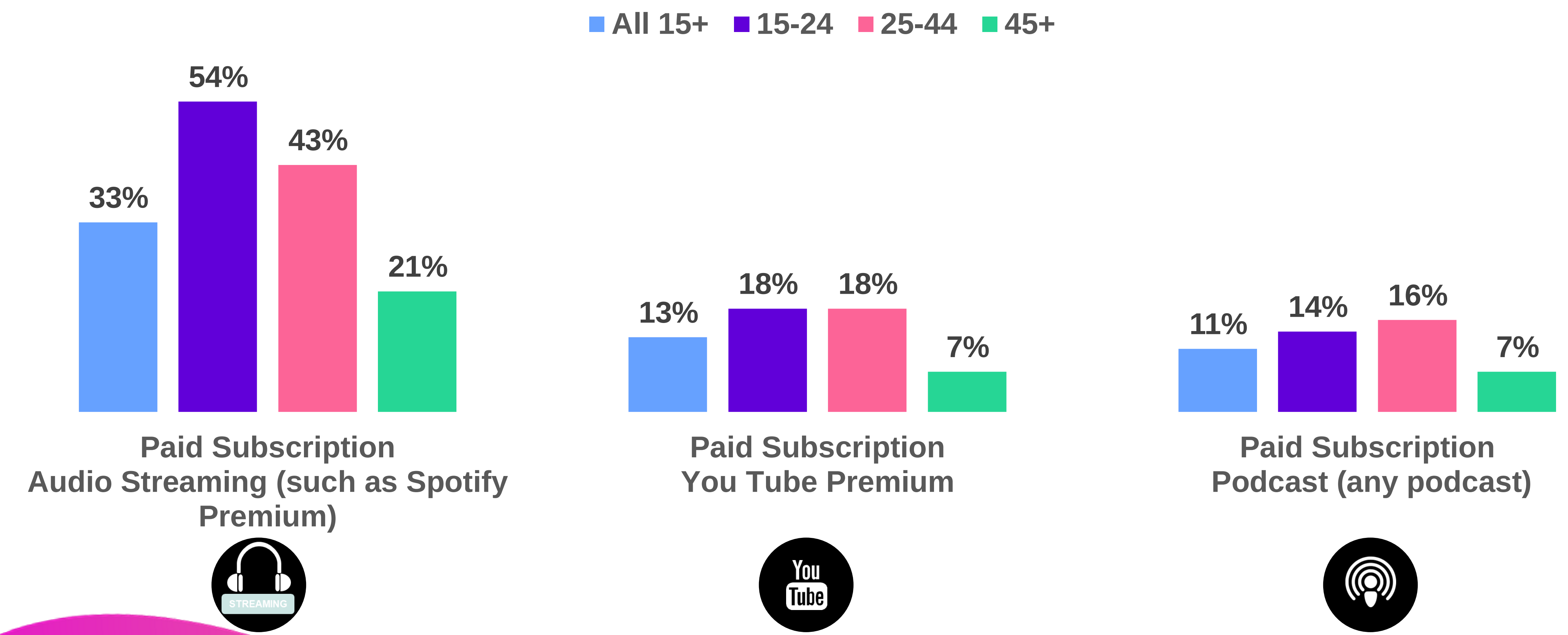
Paid Subscription (Ad free)
You Tube Premium

11%

Paid Subscription
Podcasts

Source: JNLR 2023-2 Audio Module (Apr '23 to Jun'23 – 3 mth data)
Base: All 15+

Younger people more likely to pay for audio content



Source: JNLR 2023-2 Audio Module (Apr '23 to Jun '23 – 3 mth data)
Base: All 15+

Our Daily Audio Environment

While most audio listening activity happens at home, a significant proportion are listening in the car.

Technology features strongly in this space. Almost 1 in 3 people listen to audio on a smart phone.

69%
listen to audio at home

70%
use a radio/music system to listen

41%
listen to audio in the car

30%
use a smart phone to listen

Source: JNLR 2023-2 Audio Module (Apr ’23 to Jun ’23 – 3 mth data)
Base: All 15+

While radio remains the most used device among listeners to audio content, significant proportions use a connected device.

Any Audio Activity – Average Day

70% USED RADIO/ MUSIC SYSTEM

30% USED SMART PHONE

10% USED SMART SPEAKER

7% USED PC/ LAPTOP

3% USED TABLET

3% USED TV

3% USED OTHER SYSTEM

Source: JNLR 2023-2 Audio Module (Apr ’23 to Jun ’23 – 3 mth data)
Base: All 15+

Smartphone most used device among the younger 15-24's

	Audio Activity - Average Day			
	All 15+	15-24	25-44	45+
Used radio/music system	70	49	66	80
Used smartphone	30	**60**	36	16
Used smart speaker	10	11	12	8
Used PC/ laptop	7	9	8	5
Used tablet	3	2	4	2
Used TV	3	3	4	3

Source: JNLR 2023-2 Audio Module (Apr '23 to Jun '23 – 3 mth data)
Base: All 15+

Most listening to audio material happens at home

Any Audio Activity – Average Day

69%	41%	11%	11%	3%	1%
AT HOME	CAR/ VAN	WORK/ SCHOOL/ COLLEGE	OUT WALKING/ CYCLING/ RUNNING	BUS/ TRAIN/ DART	SOMEONE ELSE'S HOME

Source: JNLR 2023-2 Audio Module (Apr'23 to Jun'23 – 3 mth data)
Base: All 15+

In car listening has increased marginally and peaks among those in employment

50%

Half of those in employment listen to audio content in car/ van on the average day

16%

And almost one in six of this working group listen at work/college

Source: JNLR 2023-2 Audio Module (Apr ’23 to Jun ’23 – 3 mth data)
Base: All 15+

Although most listening happens at home for ALL age groups, younger groups more engaged with audio outside of home compared to older cohorts.

	Audio Activity - Average Day			
	All 15+	15-24	25-44	45+
At home	69	63	63	**76**
Car/van	41	36	**48**	38
Work/school	11	13	**16**	7
Out walking/cycling/running	11	**23**	13	5
Bus/train	3	**11**	3	1
Someone else's home	1	4	*	*

Source: JNLR 2023-2 Audio Module (Apr '23 to Jun '23 – 3 mth data)
Base: All 15+

By the way …

Almost one third (32%) of those in employment work from home at least one day per week. Almost half of working graduates work from home on 1+ days.

Source: JNLR 2023-2 Audio Module (Apr ’23 to Jun ’23 – 3 mth data)
Base: All 15+

** JNLR survey data is a match for census ‘22 data*

The Audio Market

89.2%

active in the audio market on average DAY

3.7 million

active listeners

97.6%

listened to audio content in past WEEK

Almost universal listening - 4.0 million

Source: JNLR 2023-2 Audio Module (Apr'23 to Jun'23 – 3 mth data)
Base: All 15+

In an innovative and growing sector, radio is the dominant form of audio listening

91.8%

listened to live radio in past week

57.4%

listened to on-demand, online audio in past week

Source: JNLR 2023-2 Audio Module (Apr'23 to Jun'23 – 3 mth data)
Base: All 15+

Radio is the dominant form of audio listening

Listening Past Week

92%	40%	34%	23%	22%	7%
LISTEN TO LIVE RADIO	LISTEN TO MUSIC STREAMING	LISTEN TO YOUTUBE MUSIC	LISTEN TO OWN MUSIC	LISTEN TO PODCAST	LISTEN BACK TO IRISH RADIO

Source: JNLR 2023-2 Audio Module (Apr ’23 to Jun ’23 – 3 mth data)
Base: All 15+

STREAMING

Listening levels to digital formats are broadly similar to 2022 patterns, There is a small resurgence in listening to our own personal music archives.

All 15+ - Listening Past Week				
	2019	2021	2022	2023
Live Radio	93%	92%	90%	92%
Music Streaming	26%	37%	40%	40%
YouTube Music	36%	36%	35%	34%
Own Music	36%	22%	18%	23%
Listen Back	6%	6%	6%	7%
Any Podcast*	9%	17%	23%	22%

**Change in question text in regard to podcastng – not directly comparable but indicative of trend*

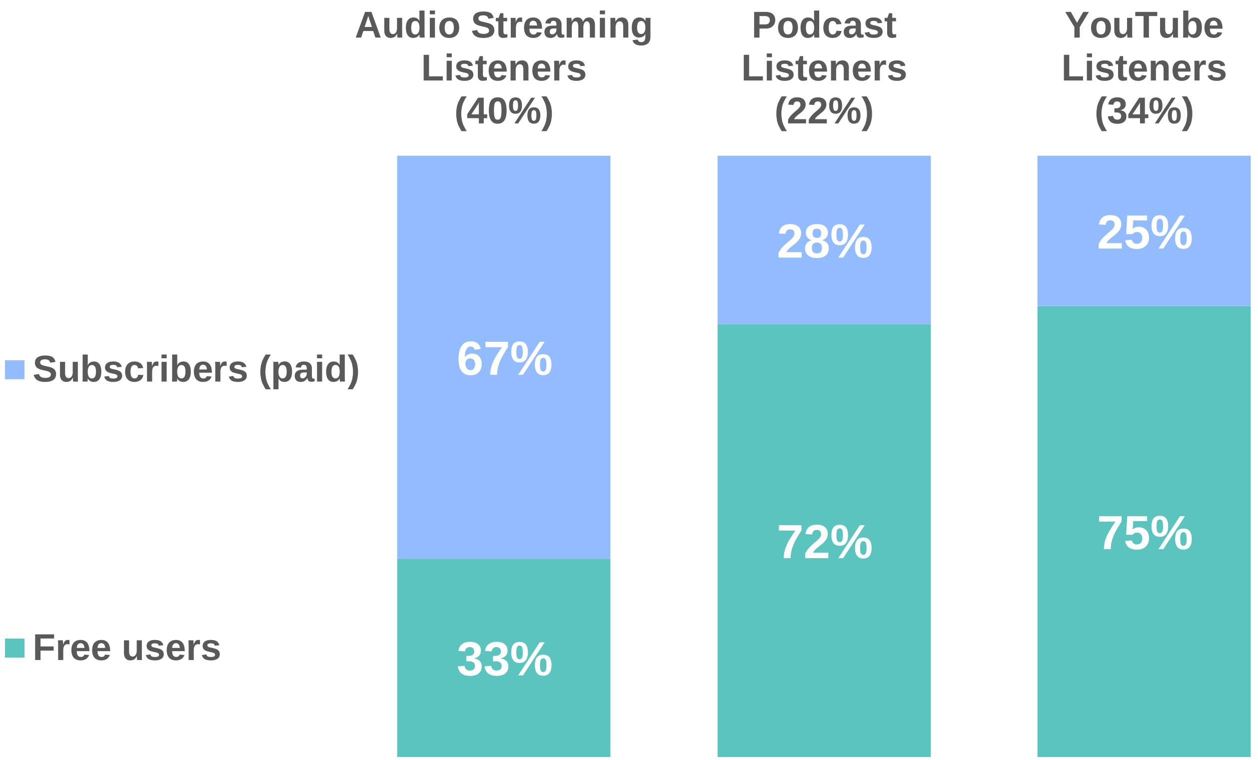
Source: JNLR 2023-2 Audio Module (Ap r'23 to Jun '23 – 3 mth data)
Base: All 15+

Listening to Audio Formats in Past Week

	15+	15-24	25-44	45-64	65+
	%	%	%	%	%
Live Radio	92	87	90	94	95
Listen Back to Irish Radio	7	9	9	8	2
Music Streaming (Spotify & Other)	40	74	52	30	6
YouTube Music	34	57	44	25	10
Own Music	23	34	25	22	14
Any Podcast	22	25	32	19	7
- Irish Podcast	15	16	23	13	6
- International Podcast	14	18	21	11	3

Source: JNLR 2023-2 Audio Module (Apr ’23 to Jun ’23 – 3 mth data)
Base: All 15+

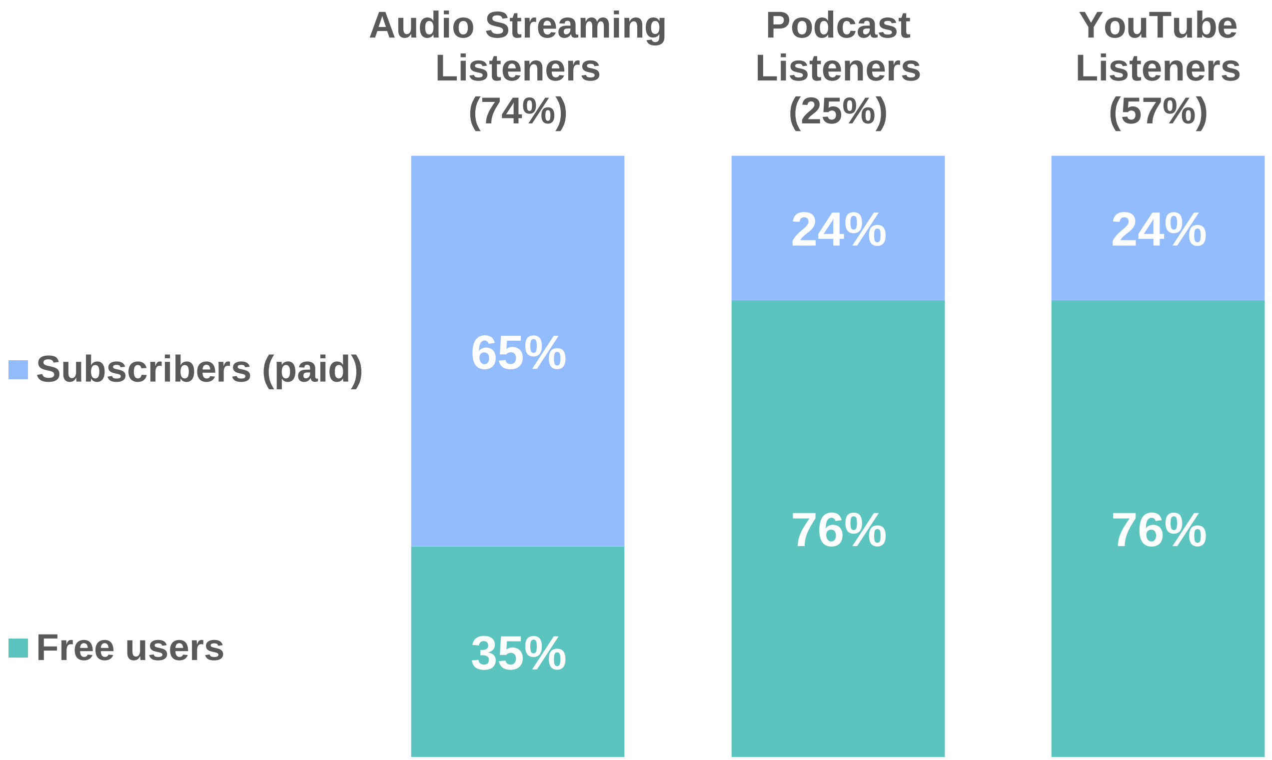
Profile Listeners Past Week



A significant proportion of audio streamers are paid up, ad-free subscribers

Source: JNLR 2023-2 Audio Module (Apr’23 to Jun’23 – 3 mth data)
Base: All format listeners

Profile Listeners 15-24's Past Week



Caution: Small sample sizes

Similar profile among 15-24's – podcast and youtube listeners mostly using free service

Source: JNLR 2023-2 Audio Module (Apr'23 to Jun'23 – 3 mth data)
Base: All format listeners

And Now The Daily Picture

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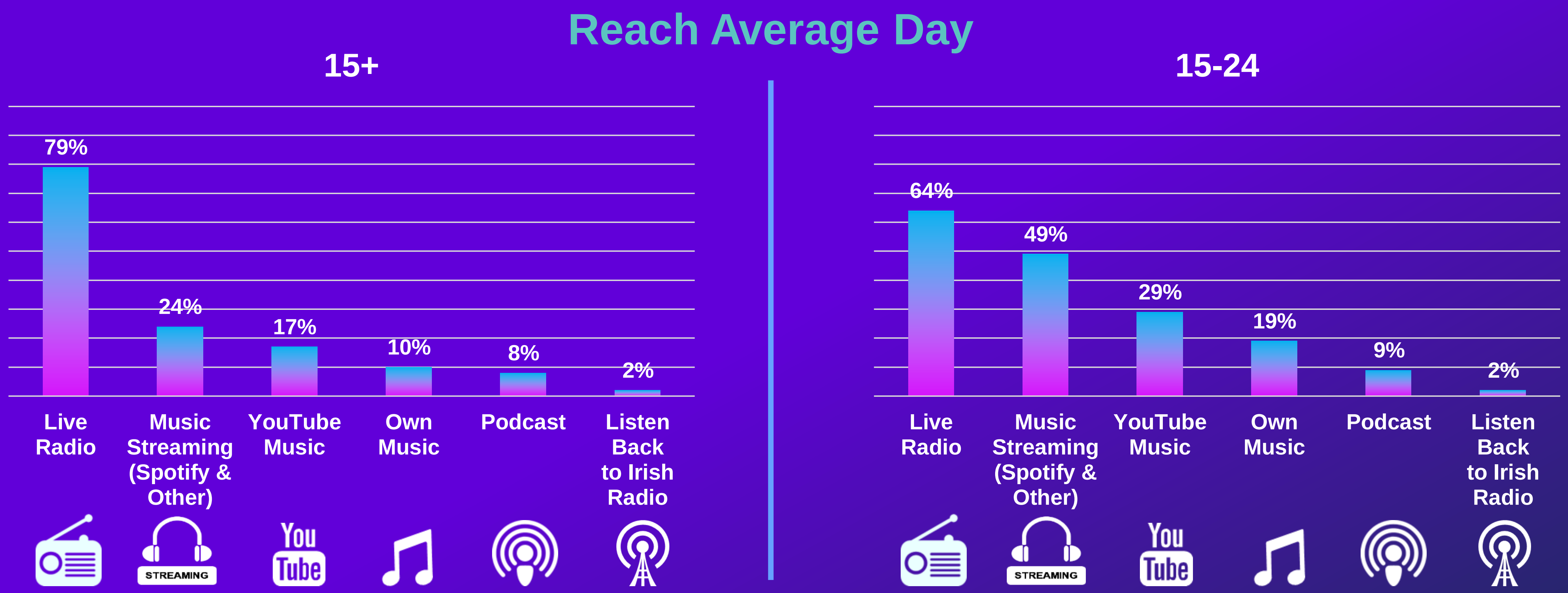
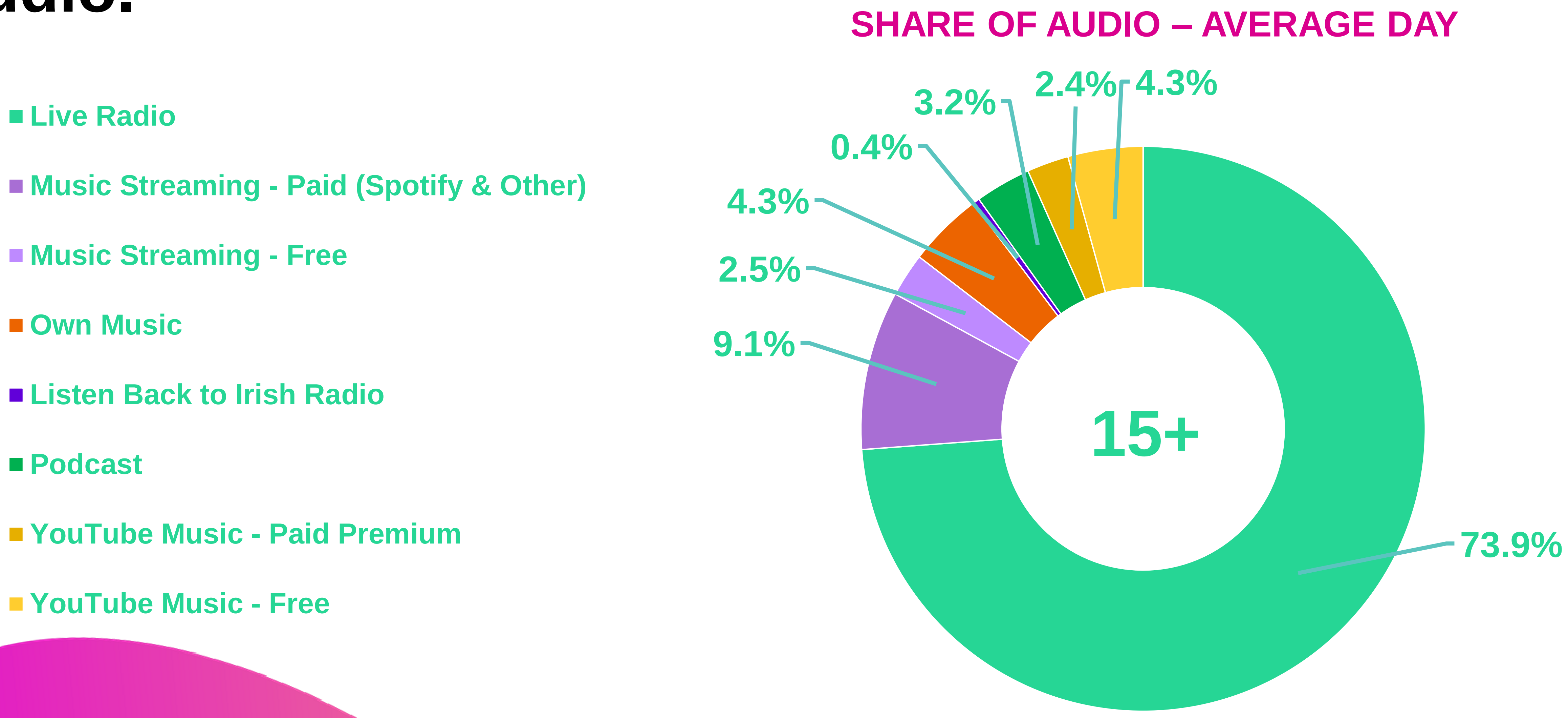
Overall, across the country, radio is the #1 choice, by a significant margin.



Source: JNLR 2023-2 Audio Module (Apr ’23 to Jun ’23 – 3 mth data)
Base: All 15+

Live radio accounts for 73.9% of all time spent on audio.

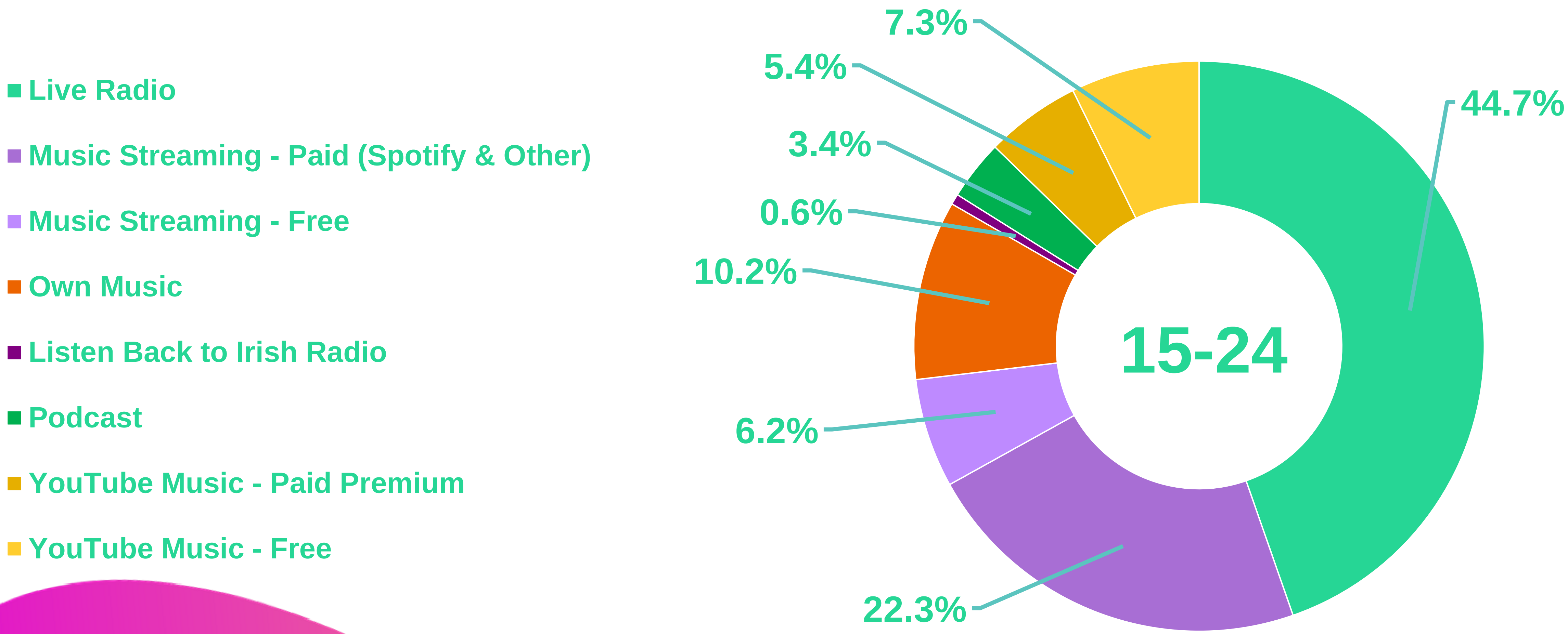


**Assumes paid up subscribers to Streaming/ YouTube use premium services to listen*

Source: JNLR 2023-2 Audio Module (Apr ’23 to Jun ’23 – 3 mth data)
Base: All 15+

For 15-24's, live radio has a share of 44.7% of all audio listening minutes

SHARE OF AUDIO – AVERAGE DAY



**Assumes paid up subscribers to Streaming/ YouTube use premium services to listen*

Source: JNLR 2023-2 Audio Module (Apr '23 to Jun '23 – 3 mth data)
Base: All 15+

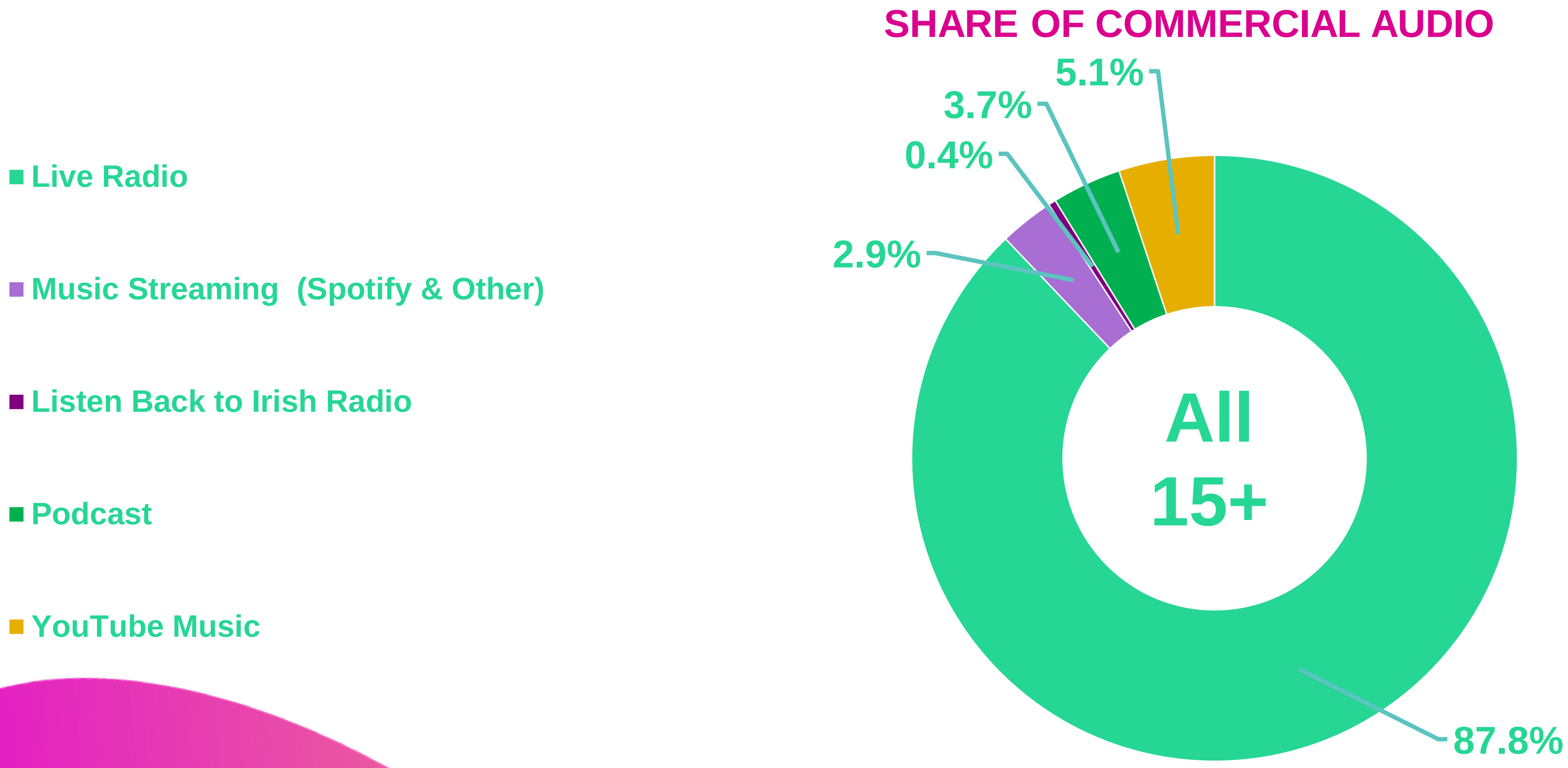
Audio – Estimated Share of Time Spent – Average Day

	15+	15-24	25-44	45-64	65+
	%	%	%	%	%
Live Radio	73.9	44.7	64.9	82.4	96.0
Listen Back to Irish Radio	0.4	0.6	0.3	0.4	0.1
Any Radio *(Live or listen back)*	74.3	45.2	65.2	82.8	96.1
Music Streaming (Spotify & Other)	11.6	28.5	15.5	6.8	0.6
YouTube Music	6.7	12.7	10.2	3.8	1.5
Own Music	4.3	10.2	4.3	3.5	1.3
Any Podcast	3.2	3.4	4.8	3.1	0.5
- Irish Podcast	1.4	0.9	2.3	1.2	0.4
- International Podcast	1.8	2.4	2.5	1.8	0.1

Share to live radio has dropped marginally overall (-0.4%) while share for other formats has re-balanced due to a small resurgence in listening to 'own music' and a change in patterns among the younger audience.

Source: JNLR 2023-2 Audio Module (Apr '23 to Jun '23 – 3 mth data)
Base: All 15+

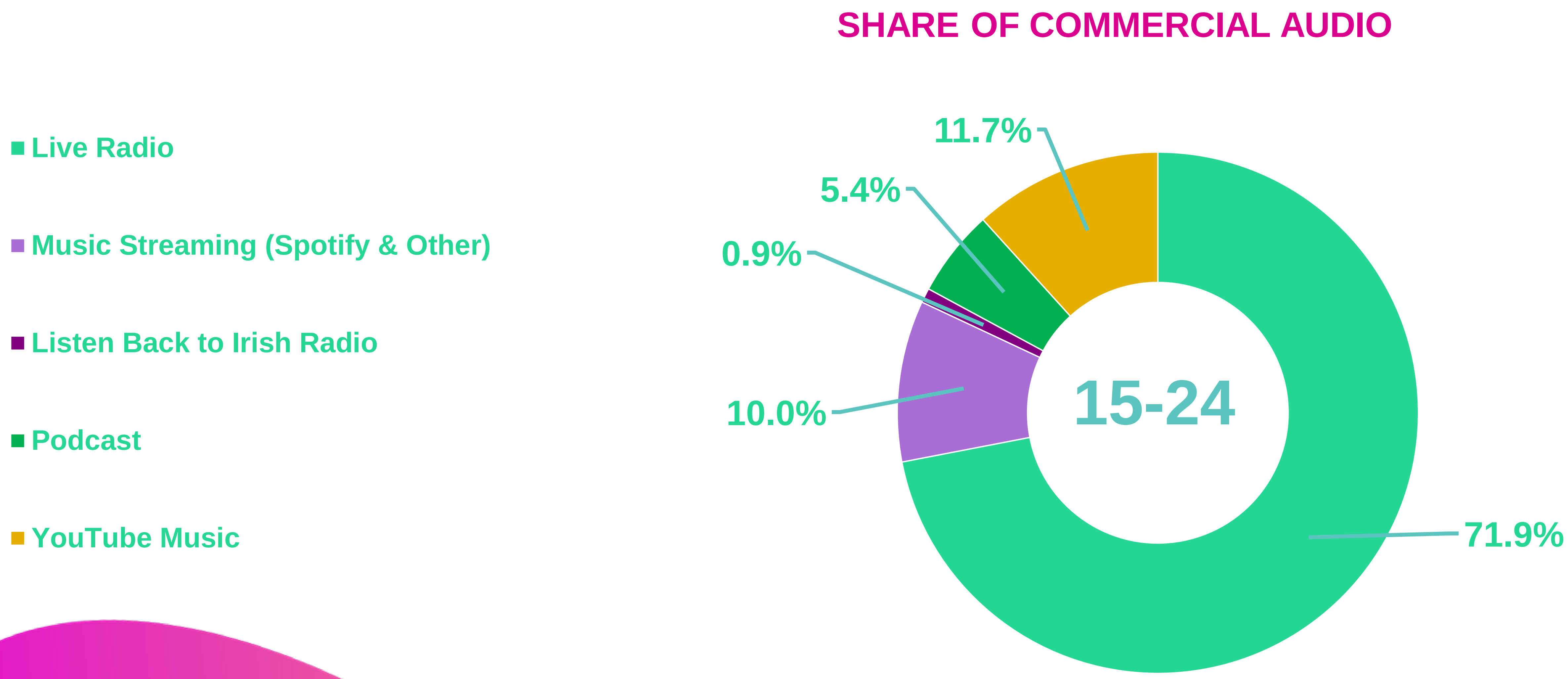
Share of ‘commercial’ audio for all adults



Source: JNLR 2023-2 Audio Module (Apr ’23 to Jun ’23 – 3 mth data)
Base: All 15+

****Assumes paid up subscribers to Streaming/ YouTube use premium services to listen***

Share of ‘commercial’ audio for all 15-24’s



**Assumes paid up subscribers to Streaming/ YouTube use premium services to listen*

Source: JNLR 2023-2 Audio Module (Apr ’23 to Jun ’23 – 3 mth data)
Base: All 15+

Thank you.

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Appendix
- Some Extras

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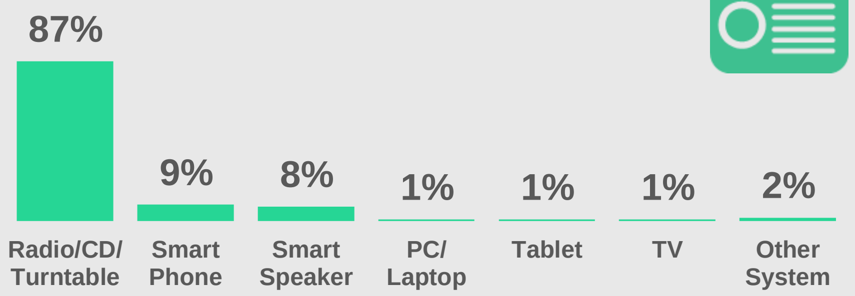
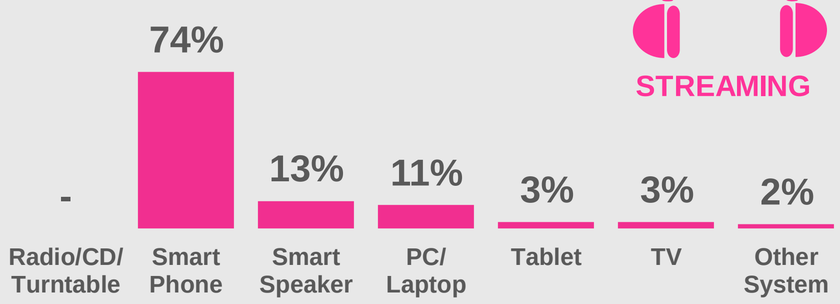
Live Radio Audience (79.3% average day)

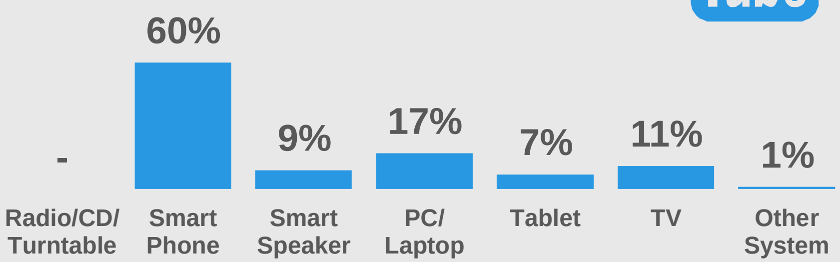


Music Streaming Audience (24.1% average day)

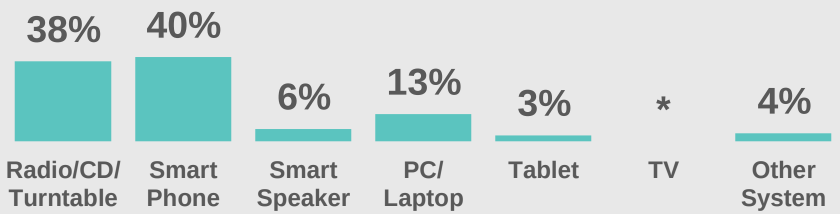
STREAMING



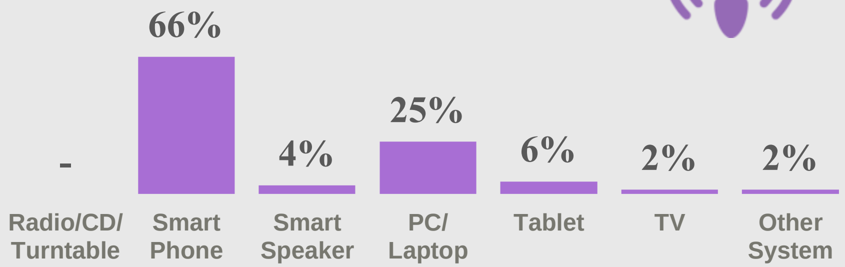
YouTube Music Audience (17.0% average day)



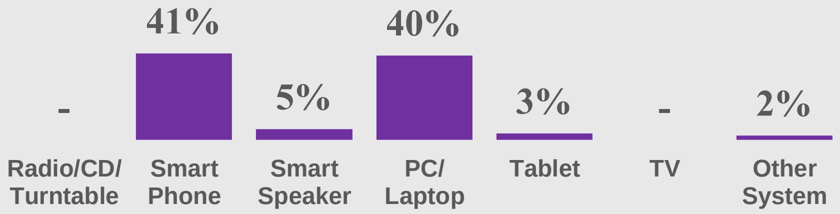
Own Music Audience (10.2% average day)



Podcast Audience (7.6% average day)



Listen Back Irish Radio Audience (1.7% average day)

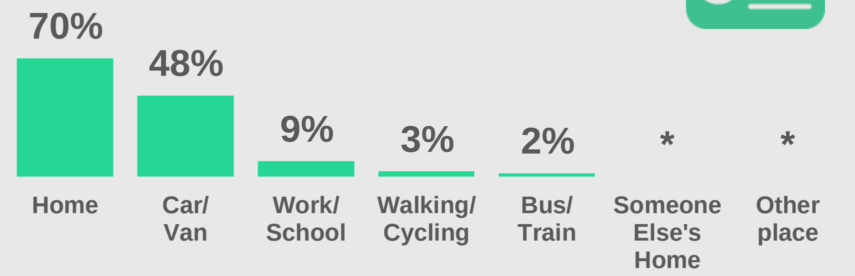


The smart phone is key device among audiences of on-demand audio

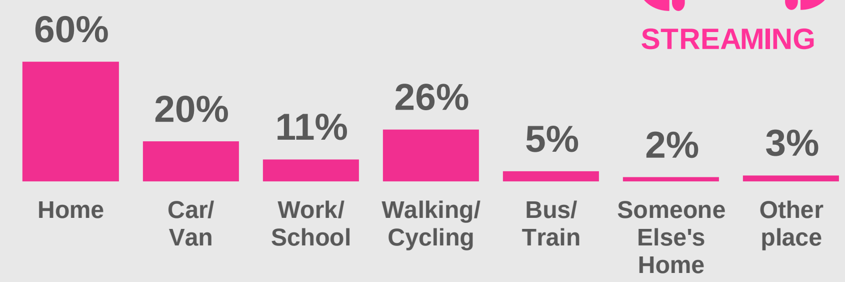
Note: Device analysis based on format audience average day - Some small base sizes

Source: JNLR 2023-2 Audio Module (Apr'23 to Jun'23 – 3 mth data)

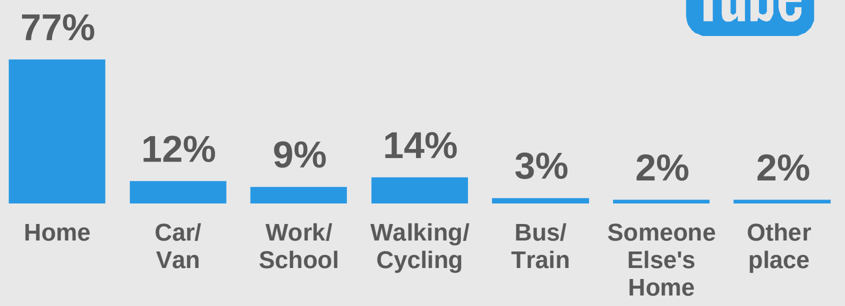
Live Radio Audience (79.3% average day)



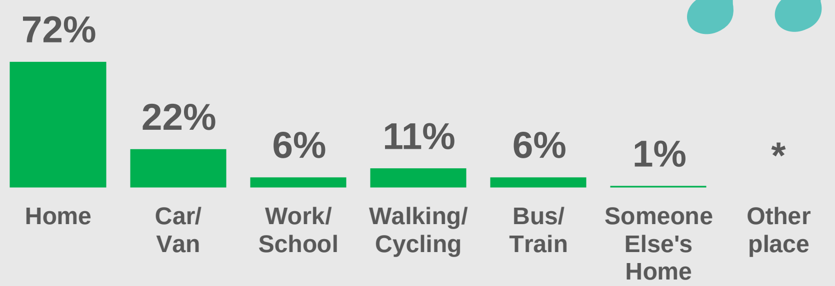
Music Streaming Audience (24.1% average day)



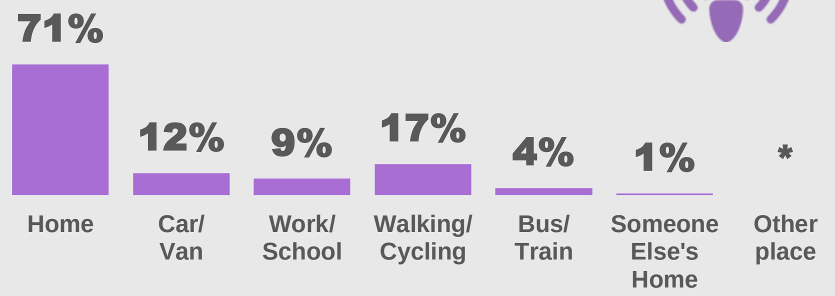
YouTube Music Audience (17.0% average day)



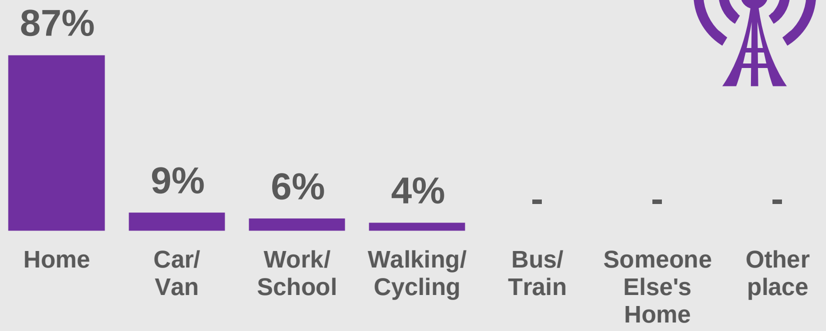
Own Music Audience (10.2% average day)



Podcast Audience (7.6% average day)



Listen Back Irish Radio Audience (1.7% average day)



Across all formats, most listening happens at home.

Live radio - the biggest format in car environment.

Note: Location analysis based on format audience average day - Some small base sizes

Source: JNLR 2023-2 Audio Module (Apr'23 to Jun'23 – 3 mth data)

STREAMING

Listening on smart speakers has increased marginally again this year whereas listening using other connected devices has dropped back.

Listening x Device Trend			
	2021	2022	2023
Radio/CD player/Turntable	72%	67%	70%
Smart Phone	28%	34%	30%
Smart Speaker	6%	9%	10%
PC/Laptop	9%	9%	7%
Tablet	5%	5%	3%
TV	2%	3%	3%
Other System	3%	4%	3%

**Listening on Average day*

Source: JNLR 2023-2 Audio Module (Ap r'23 to Jun '23 – 3 mth data)
Base: All 15+

STREAMING

While most listening still happens at home, listening outside of the home has increased marginally suggesting more people are listening as they commute/travel about their day.

Listening x Location - Trend			
	2021	2022	2023
Home	75%	74%	69%
Car/Van	34%	39%	41%
Work/ School/ College	9%	11%	11%
Out Walking/Cycling/Running	8%	9%	11%
Bus/Train/Dart	1%	2%	3%
Someone Else's Home	1%	1%	1%

2021 data was collected from Oct-Nov '20 and May-June'21 (between lockdown periods)

**Listening on Average day*

Source: JNLR 2023-2 Audio Module (Ap r'23 to Jun '23 – 3 mth data)
Base: All 15+

Listening to radio - average day

7%

Listen online
- station website

7%

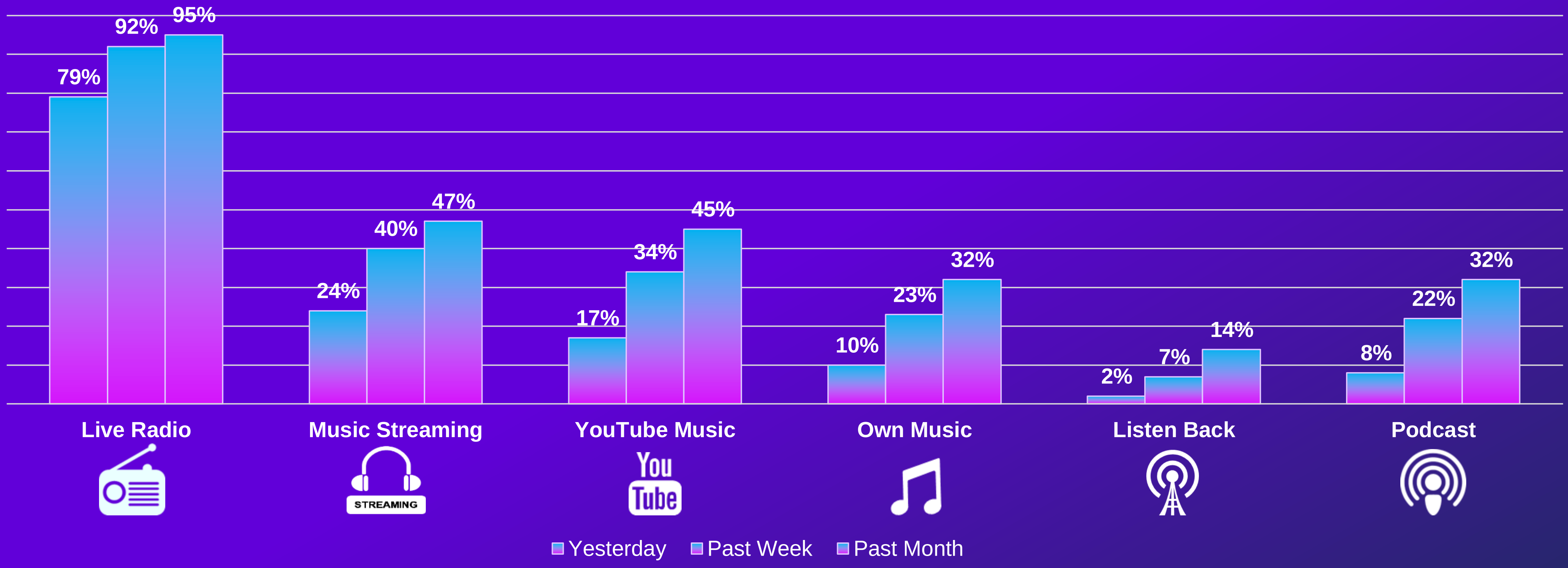
Listen online
- radio station app

3%

Listen online
- Irish radio player

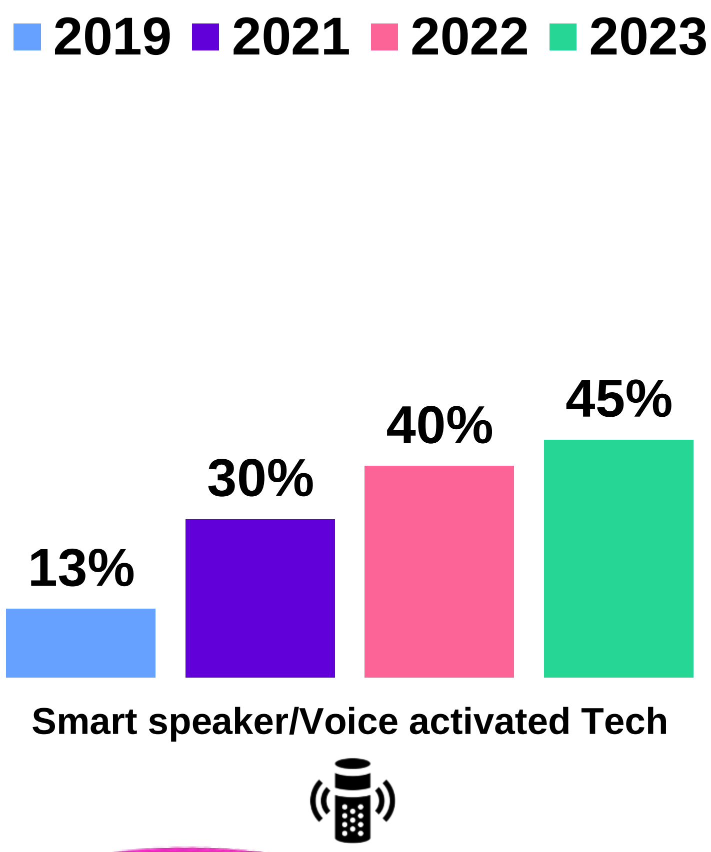
Source: JNLR 2023-2 Audio Module (Apr'23 to Jun '23 – 3 mth data)
Base: All 15+

Smaller audio formats gather additional occasional listeners on a measure of reach in the past month.



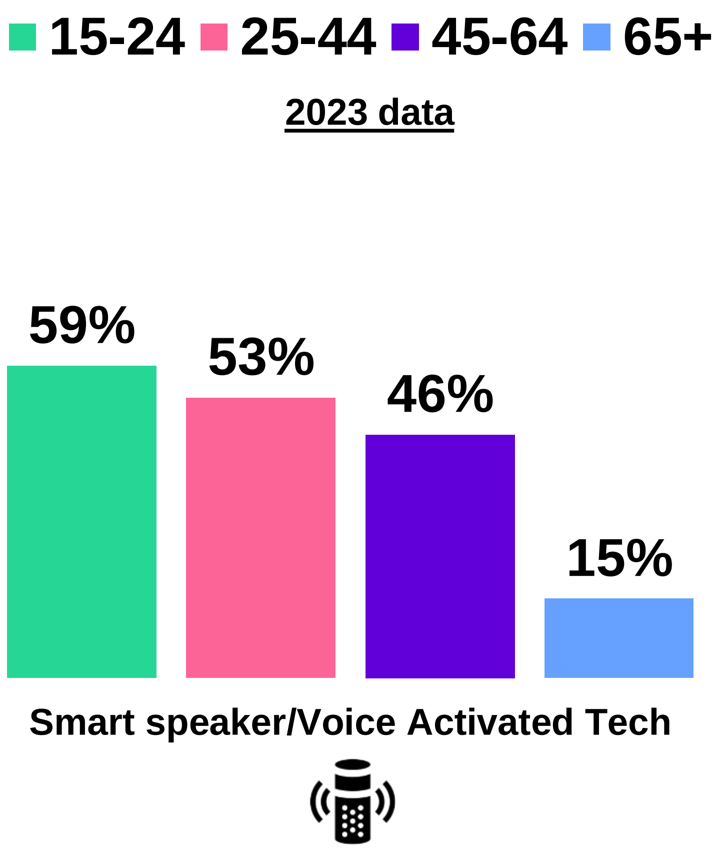
Source: JNLR 2023-2 Audio Module (Apr' 23 to Jun '23 – 3 mth data)
Base: All 15+

Ownership Of Smart Speaker



Ownership of smart speakers continues to grow.

Ownership levels higher among the younger age groups but growing across all sectors – most significant growth among 45-64's since 2021.



Source: JNLR 2023-2 Audio Module (Apr '23 to Jun'23 – 3 mth data)
Base: All 15+

Recap - Average Daily Minutes

x Head of Population

All 15+	15-24	25-44	45-64	65+
195	111	166	217	277

x Radio Listener

All 15+	15-24	25-44	45-64	65+
247	170	219	254	323

Radio engages audiences for more than 4 hours every day.

Source: JNLR 2023-2 Core Data (Jul'22 to Jun '23 – 12 mth data)
Base: All 15+

Average Daily Minutes – 7am to Midnight

Notes on Report

- **This report is sourced from JNLR data collected in Quarter 2 2023 (April to June 2023).**
- **The data in this report is based on a large national sample of 3,090 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 8-12 is based on the core interview (question 3 to 5) and key analyses presented in July 2023, based on 12-month data, (July 2022 to June 2023).**
- **Data on the broader audio market is based on the JNLR *Audio Module*, implemented in tandem with the core interview during the specific 3-month period, April to June 2023. (Please refer to the footnote on each chart to confirm the research base).**
- **The in-home, face to face, methodology ensures inclusion of all age and regional cohorts and both offline and online communities.**