

# **JNLR REPORT RADIO IN A DIGITAL WORLD**

**FEBRUARY 2021**



**JOINT NATIONAL  
LISTENERSHIP RESEARCH**



**Ipsos MRBI**  
GAME CHANGERS

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## **Radio For Everyone**



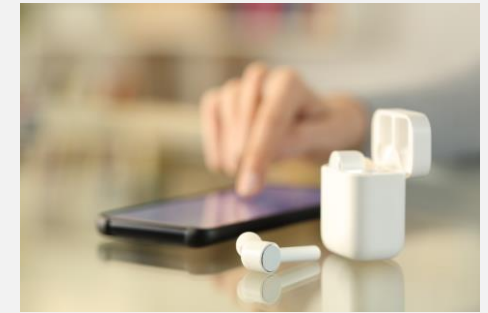
**02**


## **Radio In A Changing World**



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## **Listening To Radio In Different Ways**



A photograph of three young people. In the center, a young woman with dark curly hair is looking upwards and to the left, with her hand near her ear. To her left, a young woman with long blonde hair is partially visible, looking down. To the right, a young man with dark hair is looking down. They are all wearing blue long-sleeved shirts. The background is bright and out of focus.

# Radio For Everyone



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Whether for news, sport or music  
**3.2 million** people tune in to listen  
to radio each week day - **81%** of  
the 15+ population.

Listeners have a significant  
relationship with Irish radio across  
national, regional and local  
stations, tuning in for a total of  
**13.3 million hours** across the  
day.

On average **3 hours 23 mins** per  
day per person in the population -  
**4 hour 16 mins** per radio listener.



**Irish people love radio!**

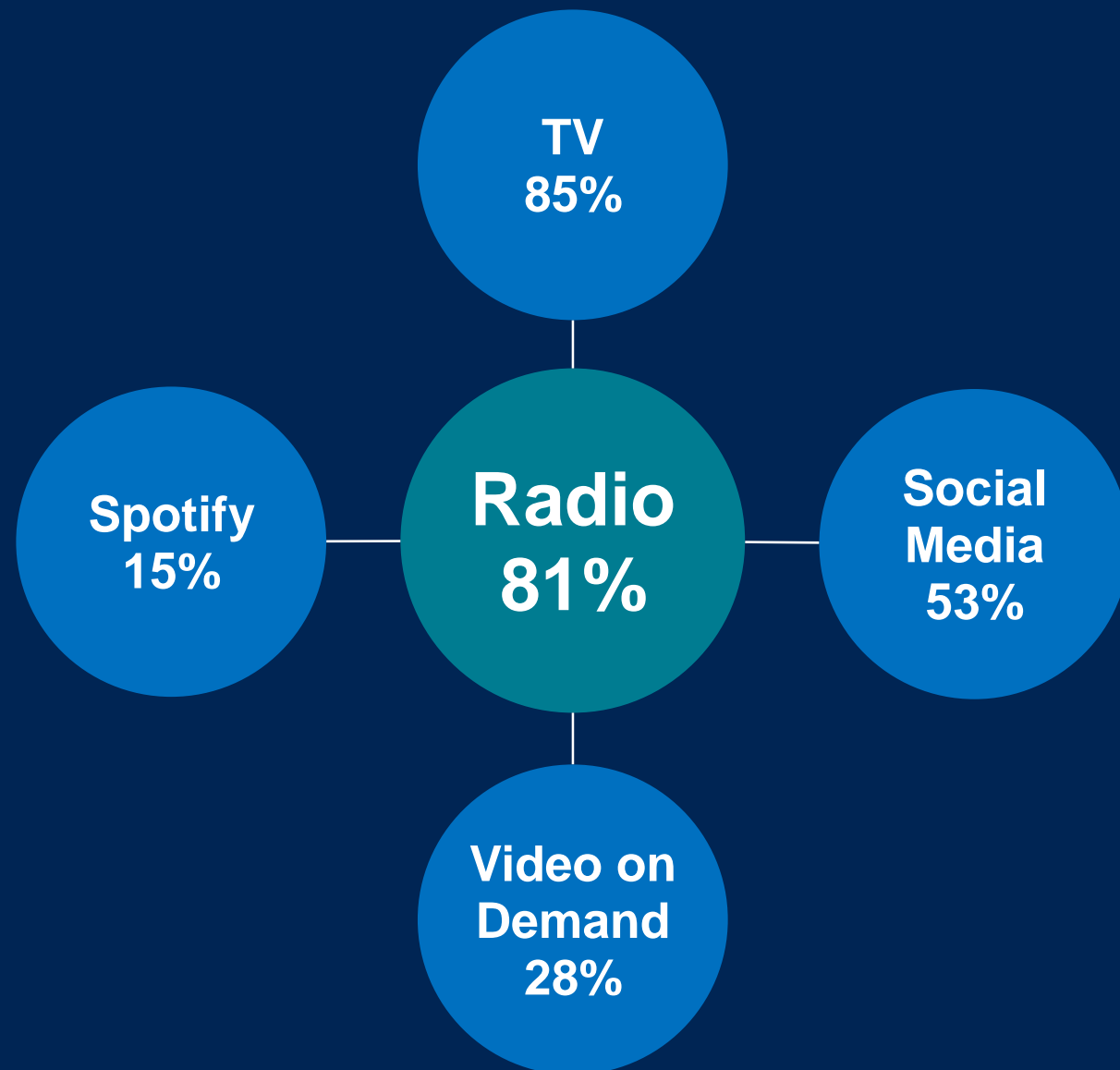


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# Radio Is Mainstream

Radio **engages** a massive proportion of the population each day.

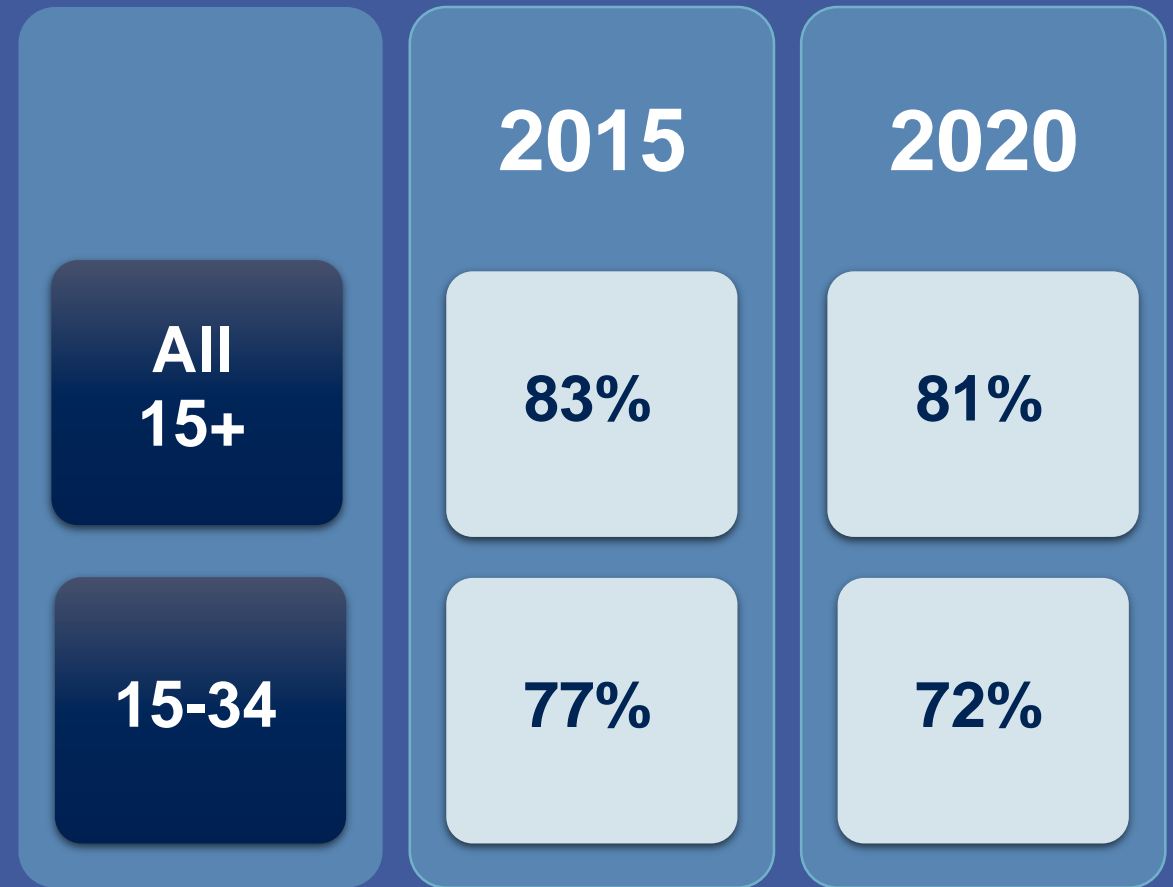
The numbers listening to radio are second only to TV viewing and significantly greater than those engaged with social media, viewing video on demand or listening to music on Spotify.



# Radio is a Dominant Player in Irish Media

Amidst a proliferation of media content, platforms and devices, radio has **maintained** its significant impact on Irish audiences over the years – a huge majority, 81%, of the population tune in every day.

And among the younger 15-34 cohort, in this intensely competitive media environment, radio continues to engage - **attracting** a massive daily audience – more than 7 in 10 listening each day.



Irish people demonstrate an **enduring** relationship with radio as JNLR data consistently shows.

During the first lockdown period in Spring 2020, with schools closed and severe restrictions in place, research published by JNLR showed significant levels of **trust** in radio to provide relevant information to listeners.

Radio achieved a trust score of **7.9** on a 10-point index, similar to TV and significantly ahead of Facebook or Twitter.

**7.9**

Trust Index

**48%**

listened for news and  
information



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# Radio In A Changing World





# Social Networking Tracker – July 2020

Irish people embrace social networking platforms but daily engagement among users varies greatly.

TikTok, the latest platform to be measured on our tracker, increased by 9 points to 15% since December 2019.

## % Social Network Account Ownership In Ireland



FACEBOOK

69%



INSTAGRAM

48%



TWITTER

34%



PINTEREST

24%



TIKTOK

15%



## % Account Owners Who Use It Daily



62%



62%



46%



11%



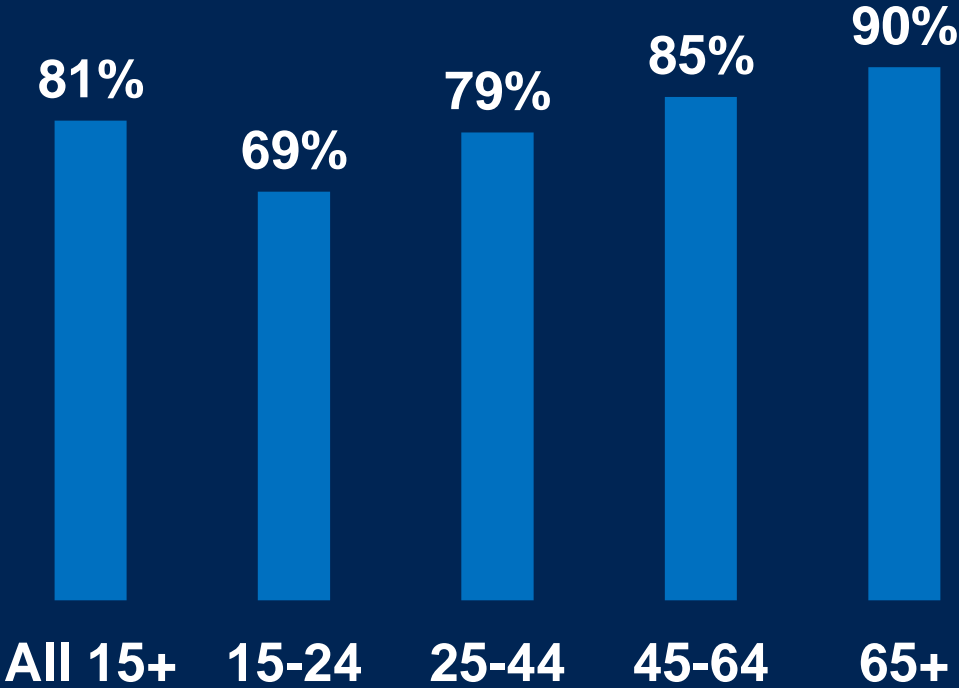
43%



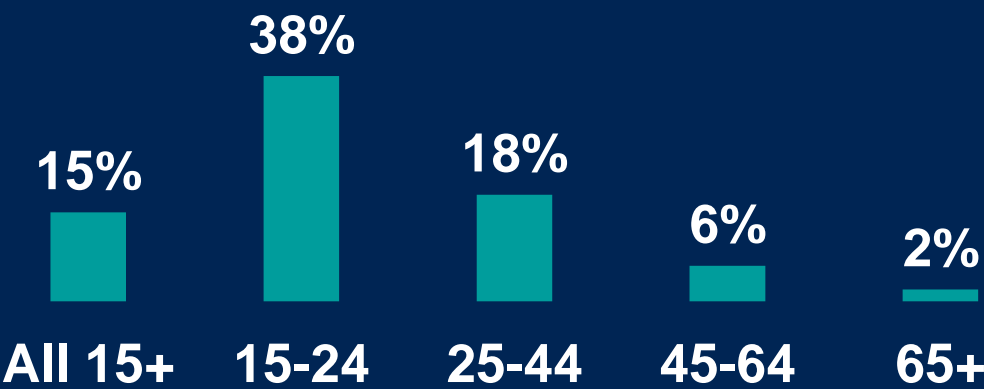
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Audio **streaming** allows us to find and collect music more easily than ever before. Daily listening to Spotify has increased by +9 points in the last 5 years. Nonetheless, listening levels remain significantly lower than for radio even among younger audiences

Radio Daily Reach



Spotify Daily Reach

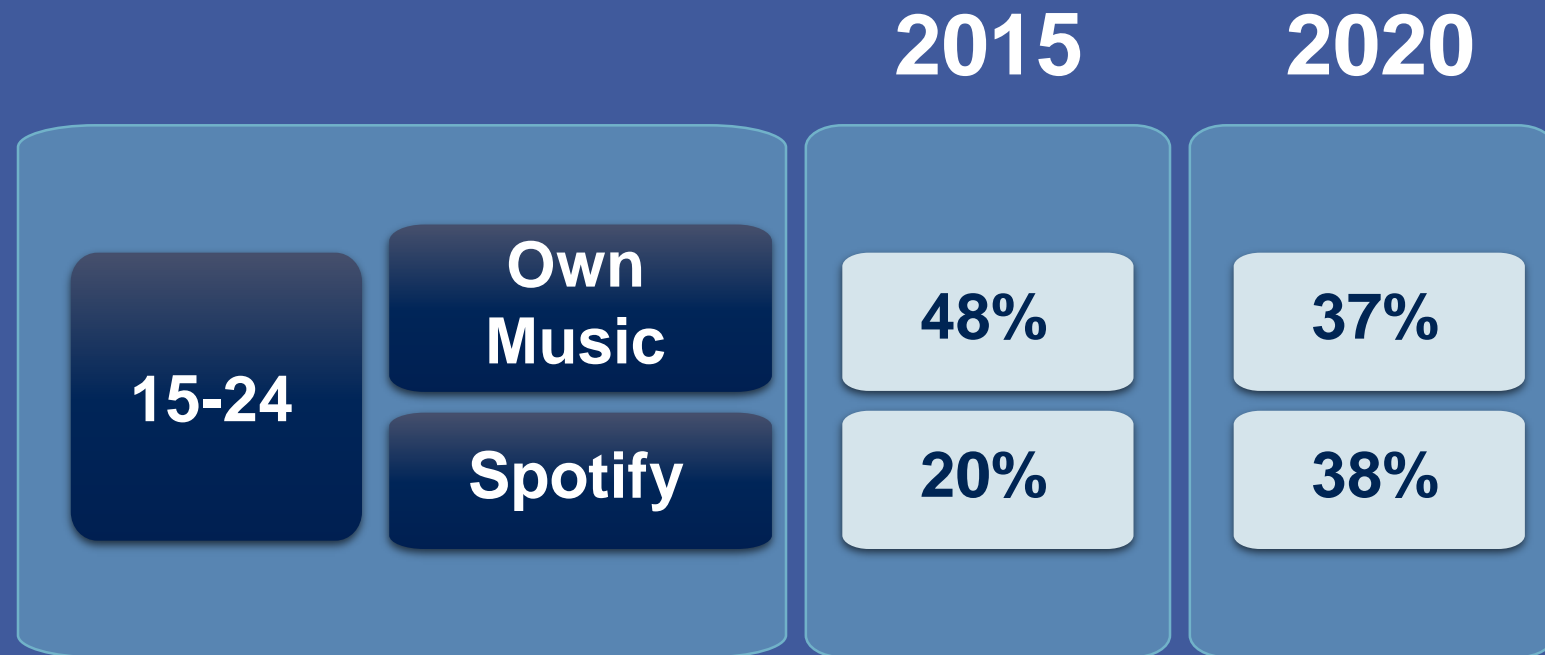


## Our Music

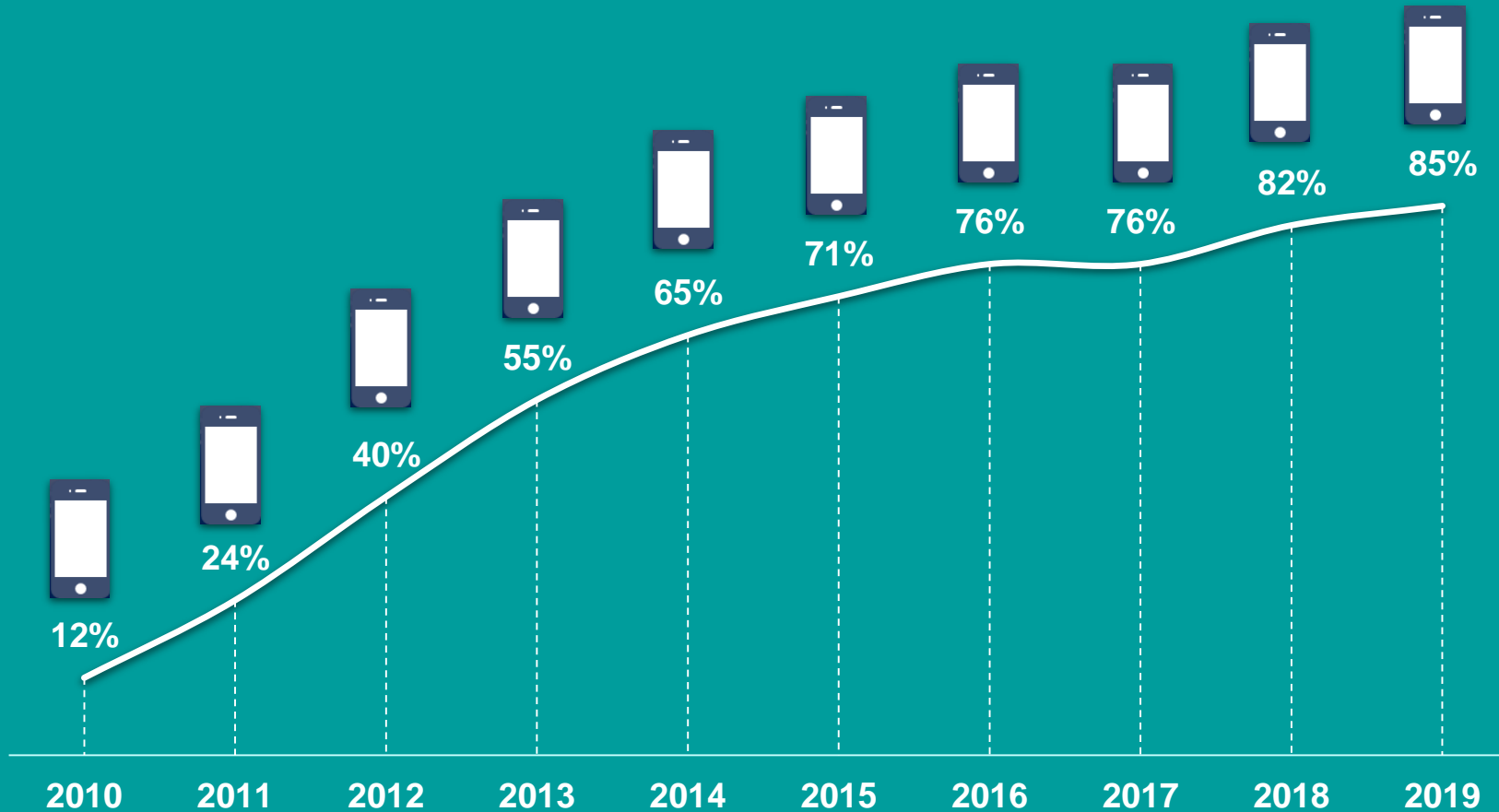
We have always collected our own personal music whether on vinyl, cassettes or CDs.

Streaming has changed how we play our music. Among the younger market, effectively taking over from the more tangible formats.

## Daily Reach



# Technology brings more ways to listen to radio and for radio to engage with audiences



## 20%

DOWNLOADED A  
RADIO STATION APP TO  
THEIR SMART DEVICE

\*Ever Downloaded



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We **own** multiple devices enabling us to **access** radio at home or on the move



**91%**

OWN  
CAR RADIO



**89%**

OWN  
FM RADIO



**77%**

OWN  
RADIO ON TV



**77%**

OWN  
RADIO ON  
MOBILE  
PHONE



**70%**

OWN  
RADIO ON PC  
LAPTOP



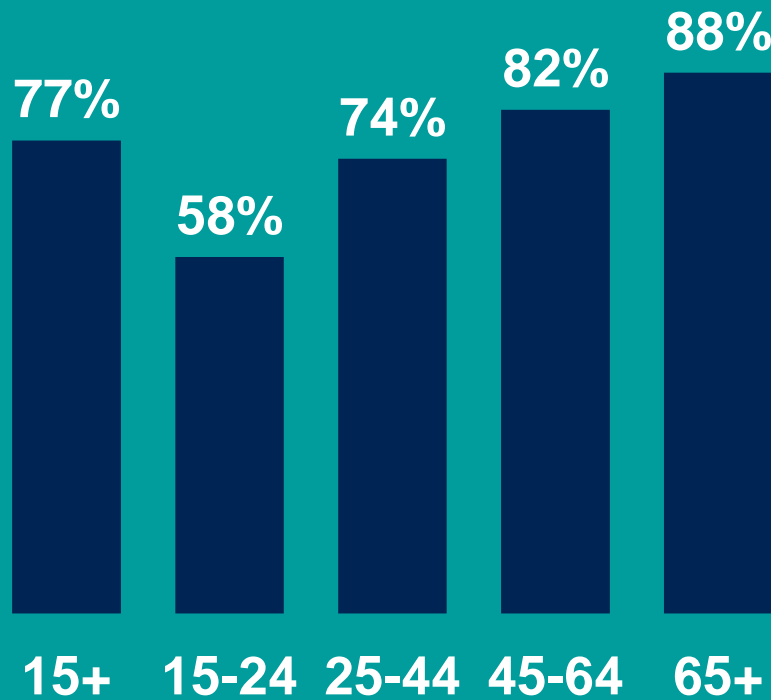
**32%**

OWN RADIO  
ON SMART  
SPEAKER

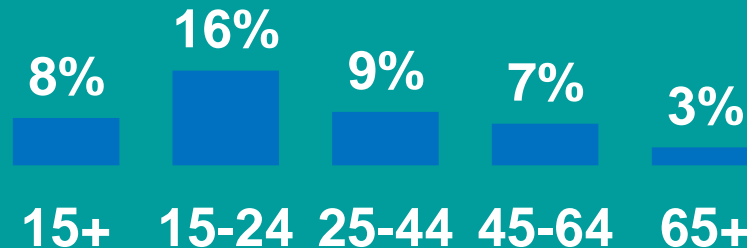
# Listening To Radio In Different Ways

Radio's appeal across a broad spectrum of ages ensures FM continues as the predominant format. 3 million people tune into FM radio each day.

Radio on FM  
Reach



Radio on Digital  
Devices - Reach



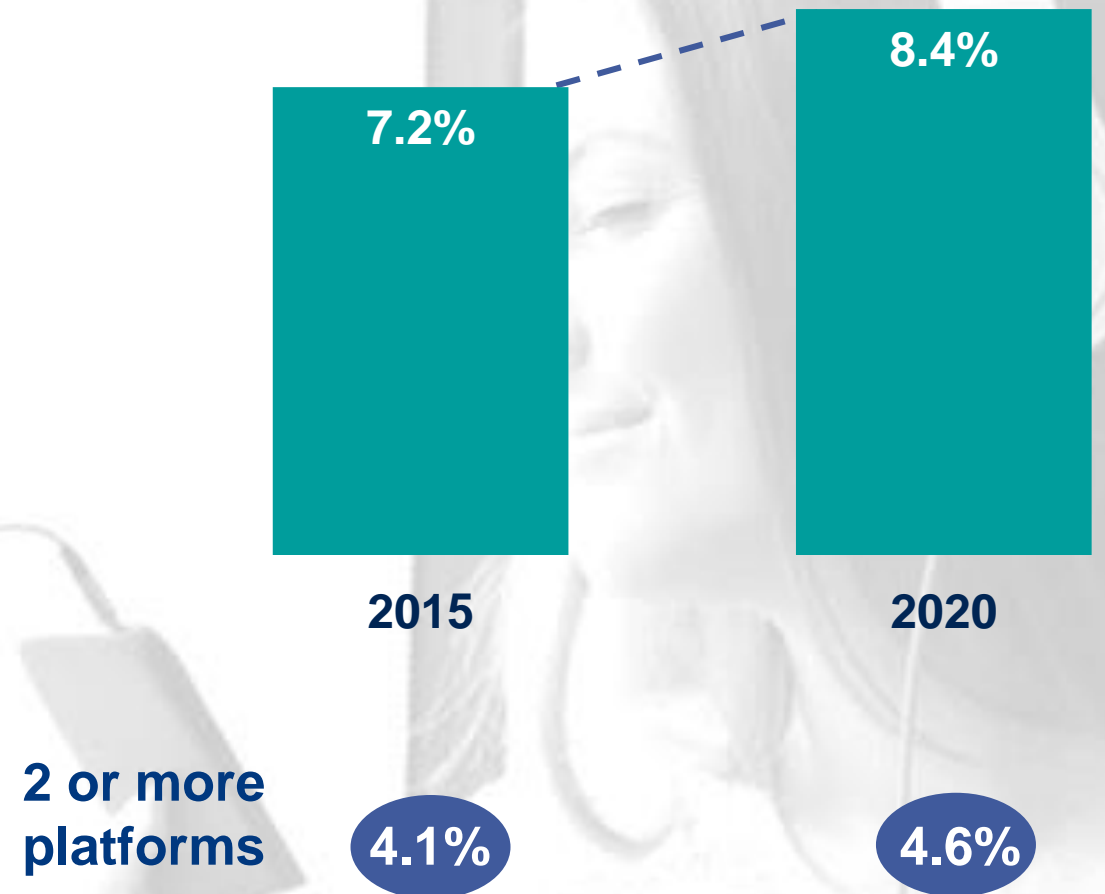
**77%**

**TUNE INTO FM  
RADIO EVERY DAY  
3 MILLION LISTENERS**

While multiple devices abound, radio listening via **digital** devices is growing slowly but steadily - currently **8.4%** each day.

A small minority listen on two or more platforms on a typical day, this proportion changing slowly over time

## Radio on Digital Devices Daily Reach





Currently the **most used** device to listen to radio is the **FM** radio at home or in the car. In terms of **digital** devices, the mobility and potential flexibility of the mobile device puts it as the next most used. The smart speaker is beginning to impact listening behaviour too.



**76.6%**

FM  
REACH  
3,015,000

**4.8%**

MOBILE  
REACH  
190,000

**1.9%**

PC/LAPTOP  
REACH  
74,000

**1.7%**

SMART  
SPEAKER\*  
REACH  
66,000

**0.6%**

TV SET  
REACH  
22,000

**0.5%**

DAB  
REACH  
18,000

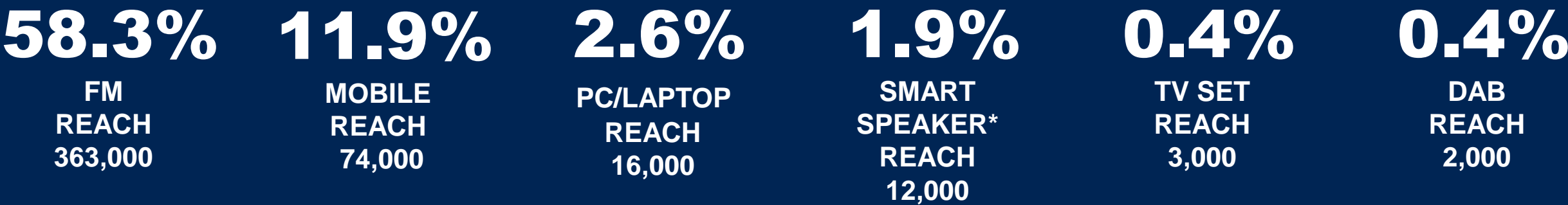
\*Smart speaker introduced in Jan '20 – estimate based on 6-months data completed since introduction



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Among the younger **15-24** age cohort the most used **digital** device to listen to radio on a daily basis is the mobile device.

15-24's

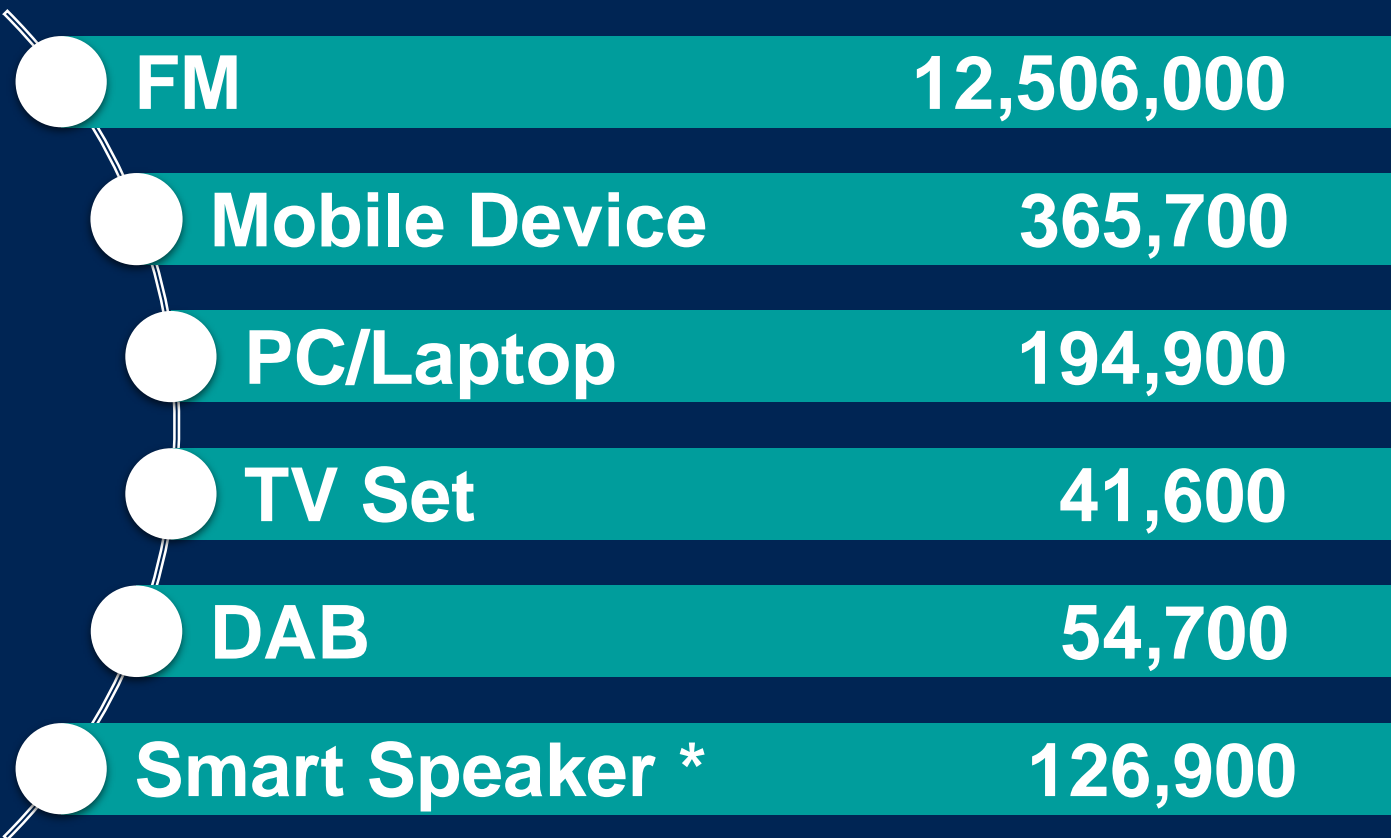


\*Smart speaker introduced in Jan '20 – estimate based on 6-months data completed since introduction

In terms of time spent listening to radio, **12.5 million hours** are spent on **FM** each week day while audiences listen via **digital** devices for **0.78 million hours** daily



Hours per day

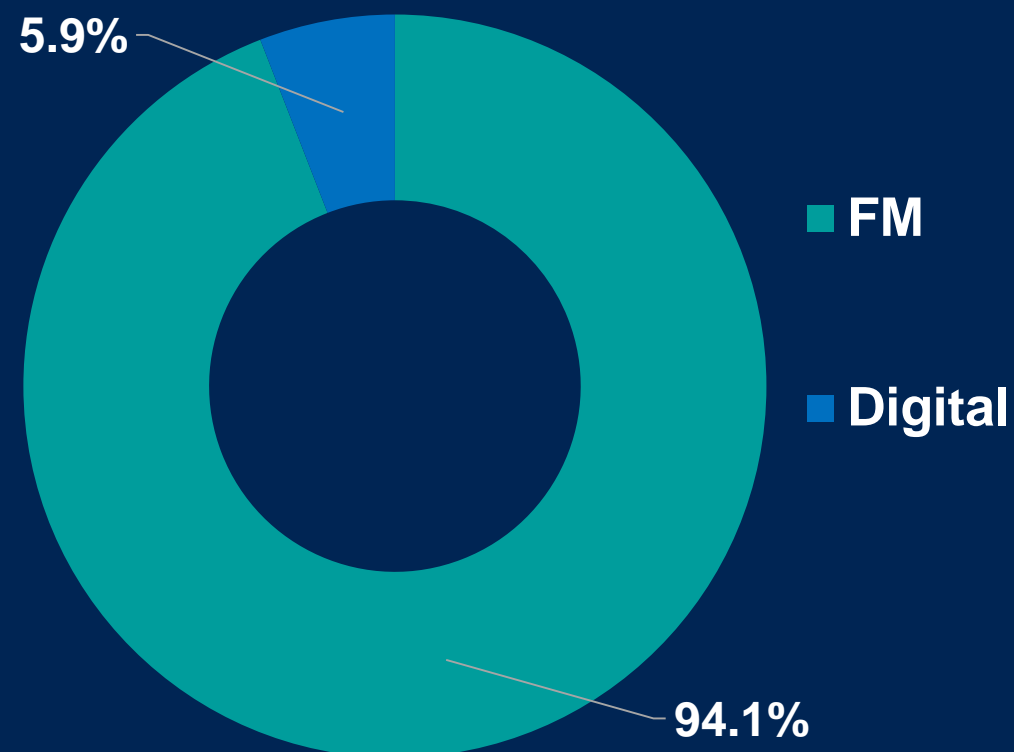


\*Smart speaker introduced in January 2020 - estimate based on 6 months data completed since introduction = 195,800 hours

## Radio - Share Of Time Spent 7am To Midnight

While most listening happens on the **FM band**, share of radio listening on digital devices is growing at a slow but steady pace - **+1.3%** since 2015.

Among the younger age groups the pace of change is faster.





Examining share of time spent listening across the day, (7am to midnight), illustrates the relative strength of **digital** formats among **younger** audiences.

Among 15-24s, share of minutes to digital formats has increased from 14.0% to 17.2% since 2015.



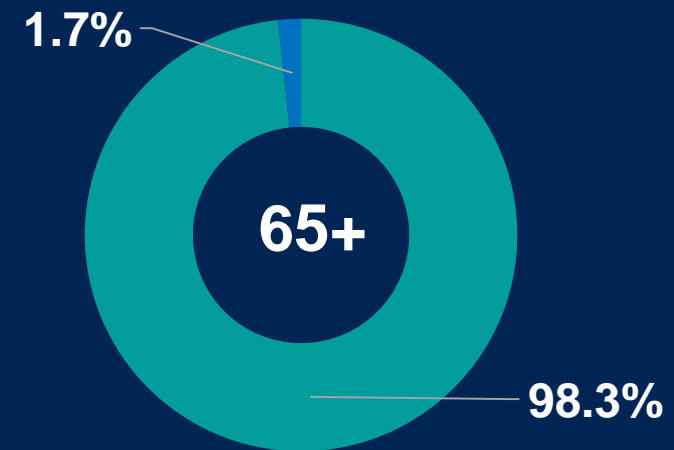
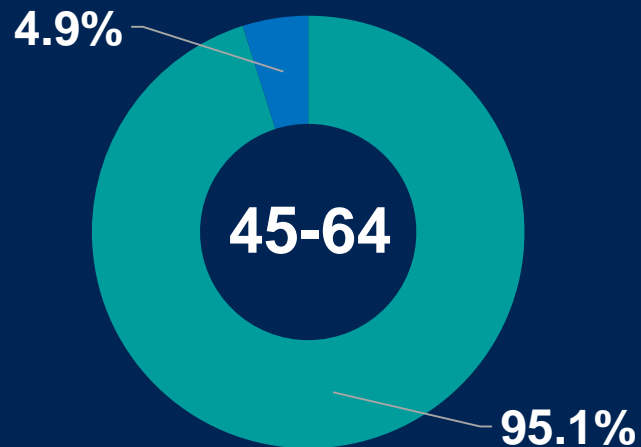
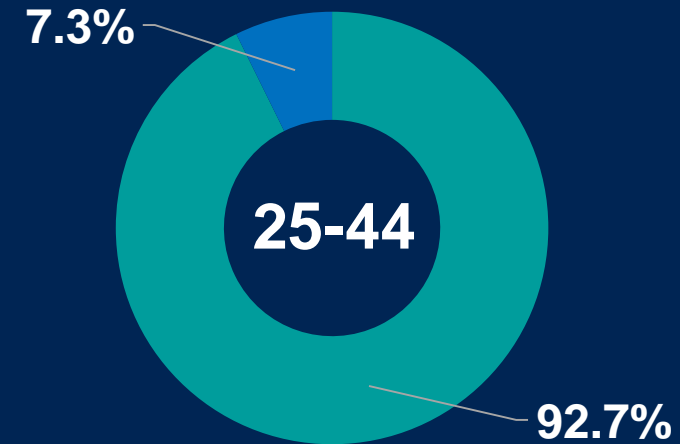
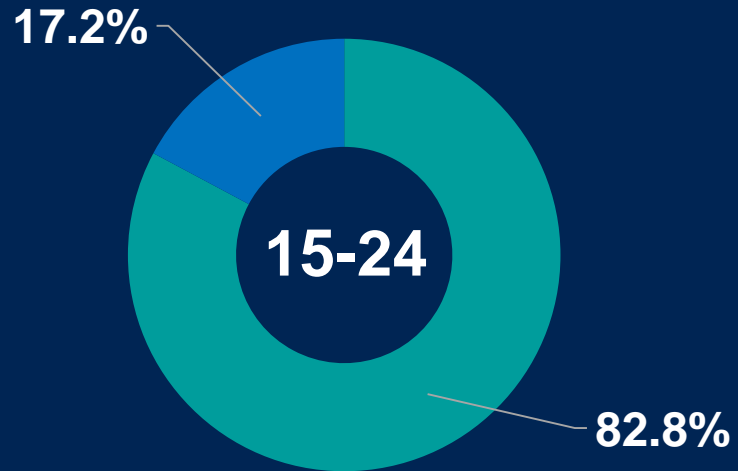
## Radio on Digital Share of Time

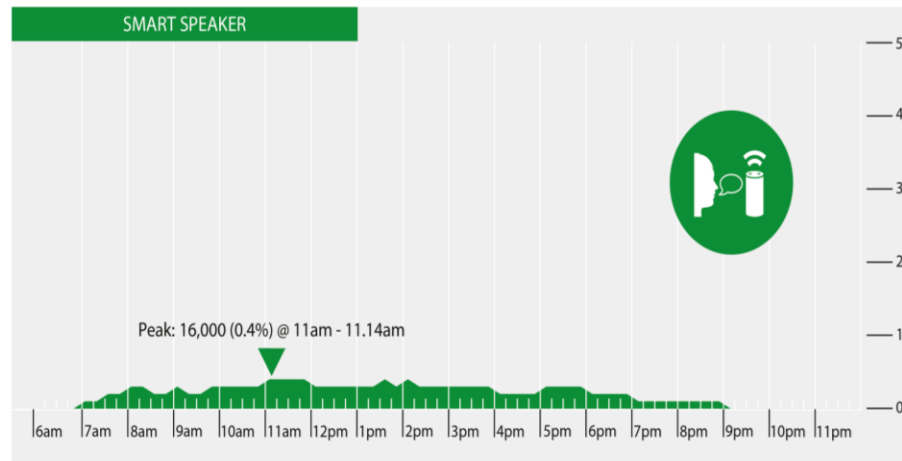
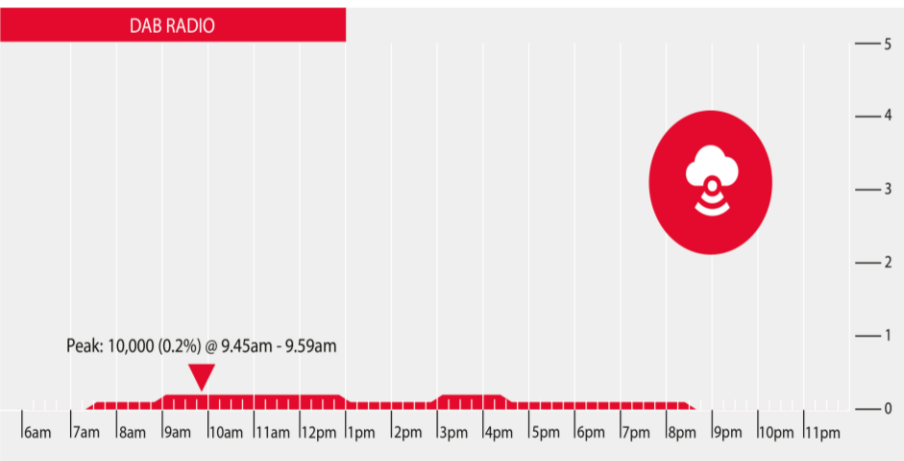
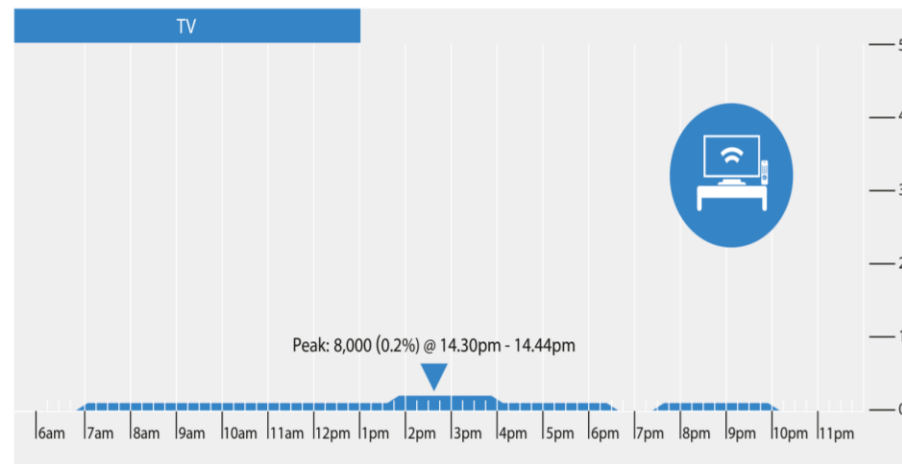
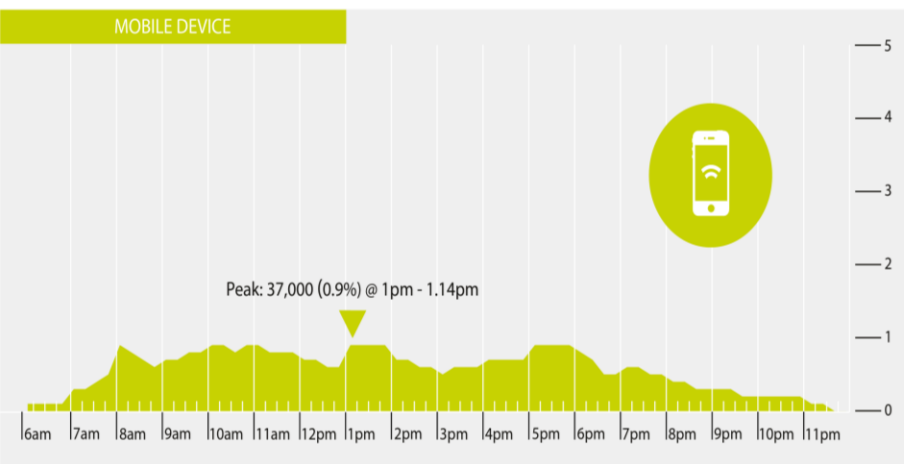
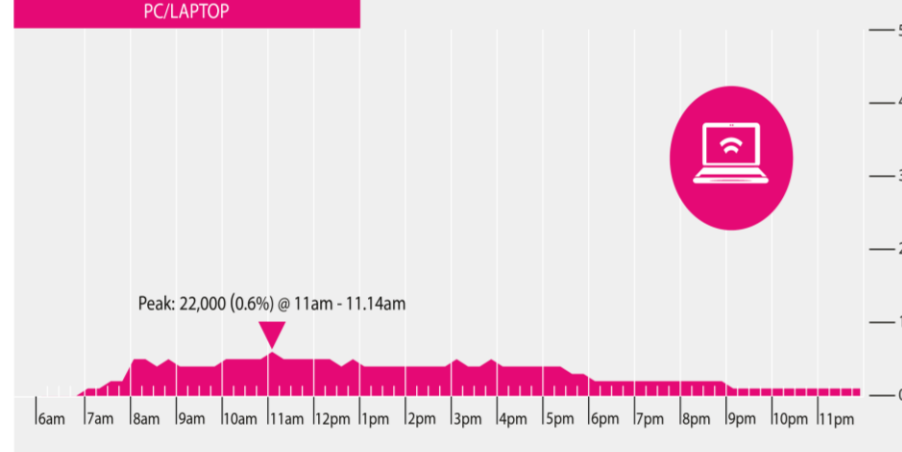
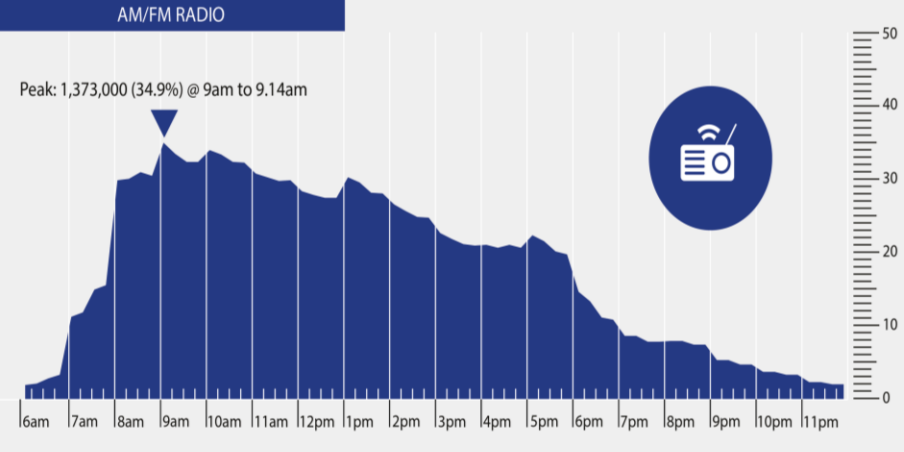
	2015	2020
15+	4.6%	5.9%
15-24	14.0%	17.2%
25-44	5.7%	7.3%
45-64	3.2%	4.9%
65+	1.5%	1.7%

# Digital Devices for Radio impact among younger audiences

## Radio Share Of Time Spent - 7am To Midnight

■ FM  
■ Digital





# Time of Day

Listening peaks  
across the mid-  
morning to  
afternoon on  
digital devices

Note: Scale differs for FM graph

Source: JNLR 2020-3

Radio attracts significant audiences at the **weekend**.

**74%** tune in on one or other day on the weekend, **8%** on a digital device.

A further **19.7 million hours** of radio across the two days of the weekend - **1.1 million hours** on digital devices

**74%**

Radio Reach at the Weekend

**8%**

Digital Radio Reach at the Weekend





Including the weekend days, an estimate of **monthly** radio hours = **371.3 million hours**. Time spent listening via **digital** devices amounts to **21.6 million hours**

## Upcoming .....

The next report from JNLR will investigate the broader **audio** market with updates on how and where we listen to audio content, live and on demand, with information on Radio, Spotify, Podcasts and Listen back activities.

**Date: April/May 2021**

# Notes on Report

- This report is primarily sourced from the latest published JNLR report, 2020-3 (October 2019 to September 2020).
- Due to Covid-19 restrictions no interviewing was conducted in Quarter 2 (April, May, June) 2020. Therefore, the data in this report incorporates 9-months' data during this 12-month period.
- Radio reach via digital devices referenced in this report is based on listening activity to Irish Commercial and RTE FM stations measured in the JNLR survey.
- Media module data used in this report is sourced from the most recent module reported in 2019-2.
- Smart speaker introduced in January 2020 – reach estimates for smart speaker are based on data collected since that date. Share estimates for same period shown in footnote.