RADIO AND THE IRISH AUDIO MARKET

JNLR - AUGUST 2021

IN SUMMARY

JOINT NATIONAL LISTENERSHIP RESEARCH

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.

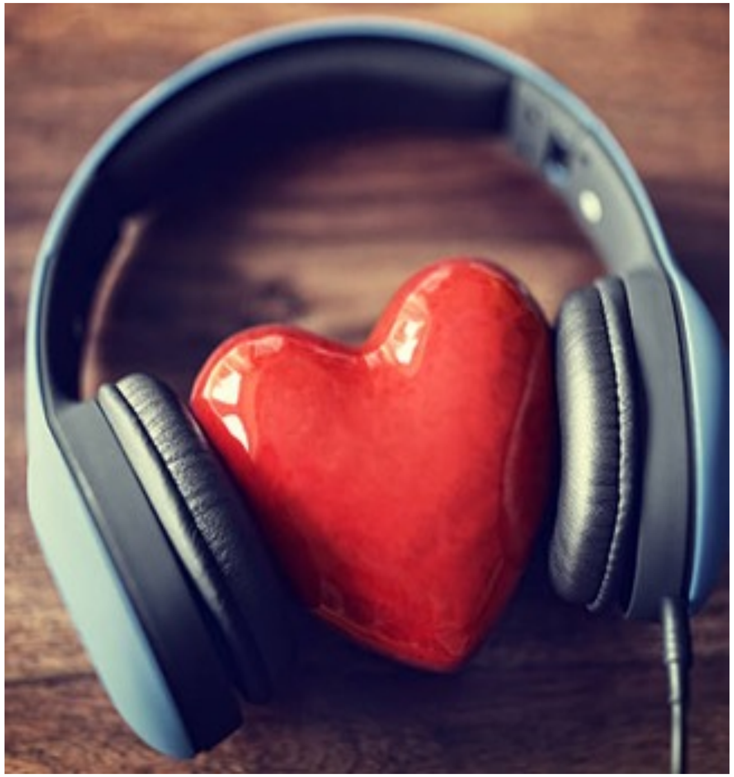
   There is more activity among the younger 15-24 year old audience in this space. While more of this group tune into on-demand audio options than the average audience, *Live* radio still achieves the majority share of time spent – 53.2%. Music streaming (Spotify or similar) has a share of 25.2% among this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

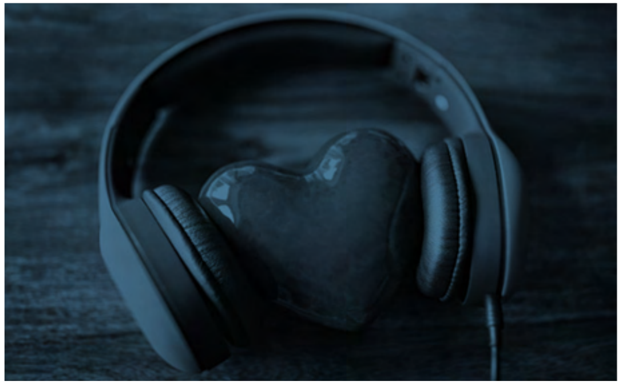
Source: JNLR 2021-2

Contents

Source: JNLR 2021-2

Ipsos MRBI GAME CHANGERS





KEY DATA

GAME CHANGERS

Source: JNLR 2021-2 Core Interview (Oct and Dec'20 + May and Jun'21)

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

Source: JNLR 2021-2 Core Interview-(Oct+Dec'20 and May+Jun'21)
Base: All 15+ - Mins/hours - 7am to Midnight

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

Source: JNLR 2021-2 Core Interview-(Oct+Dec'20 and May+Jun'21)
Base: All 15+

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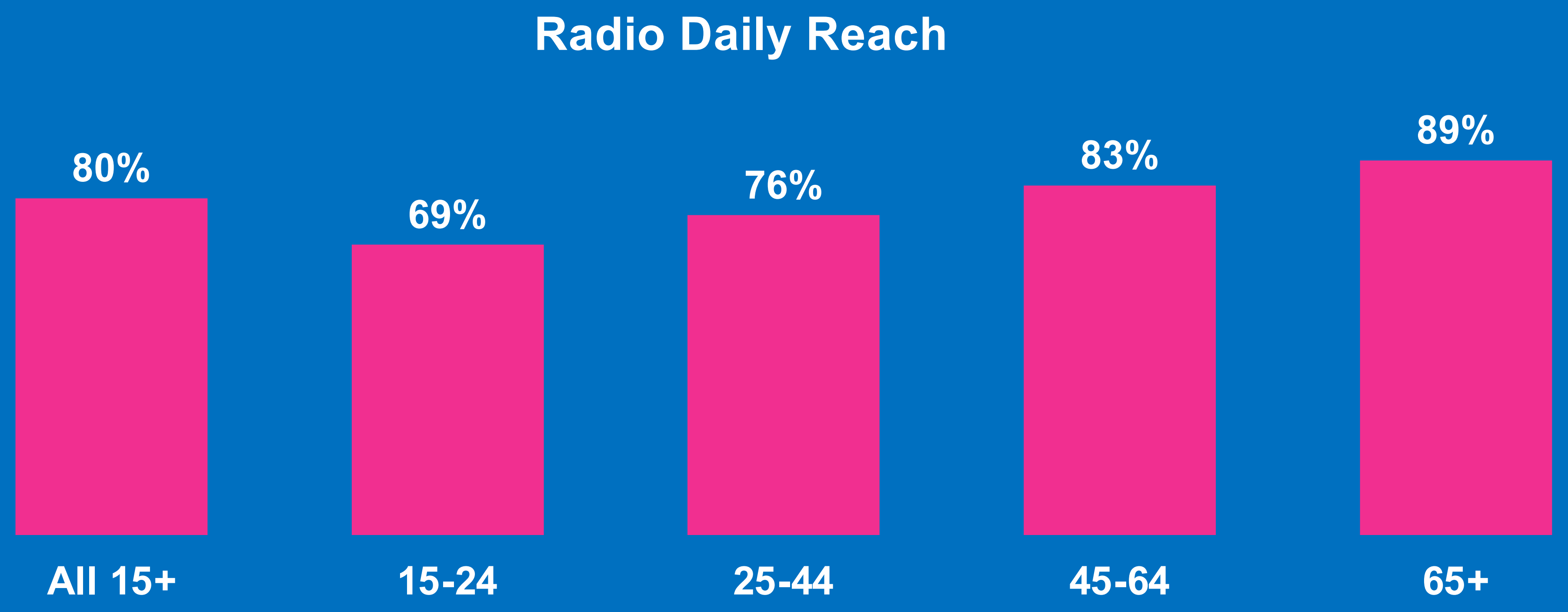
Among the 15-24 cohort radio holds an enviable position – 7 in 10 tuning into radio every day



Source: JNLR 2021-2 Core Interview-(Oct+Dec'20 and May+Jun'21)
Base: All 15+

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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

All 15+	15-24	25-44	45-64	65+
197	124	167	219	279

x Radio Listener

All 15+	15-24	25-44	45-64	65+
256	189	229	274	320

Source: JNLR 2021-2 Core Interview-(Oct+Dec'20 and May+Jun'21)
Base: All 15+ - Mins/hours - 7am to Midnight

Average Daily Minutes – 7am to Midnight

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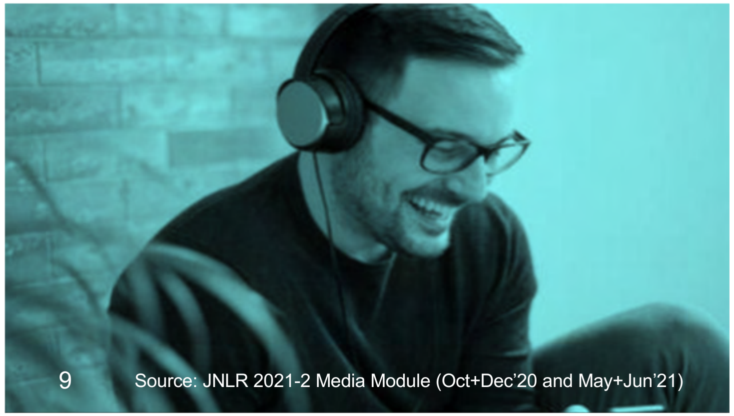

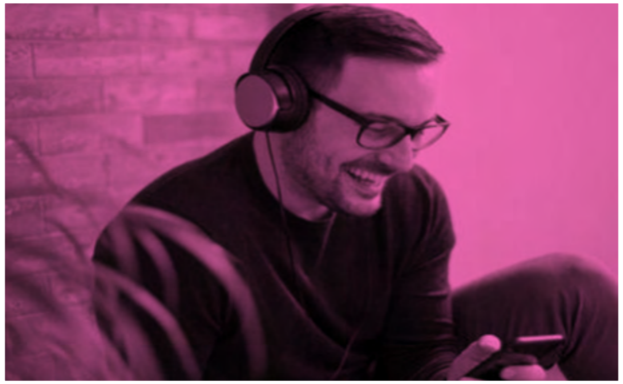

TECHNOLOGY ENABLES ACCESS

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

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.)

Source: JNLR 2021-2 Media Module (Oct+Dec'20 and May+Jun'21)
Base: All 15+

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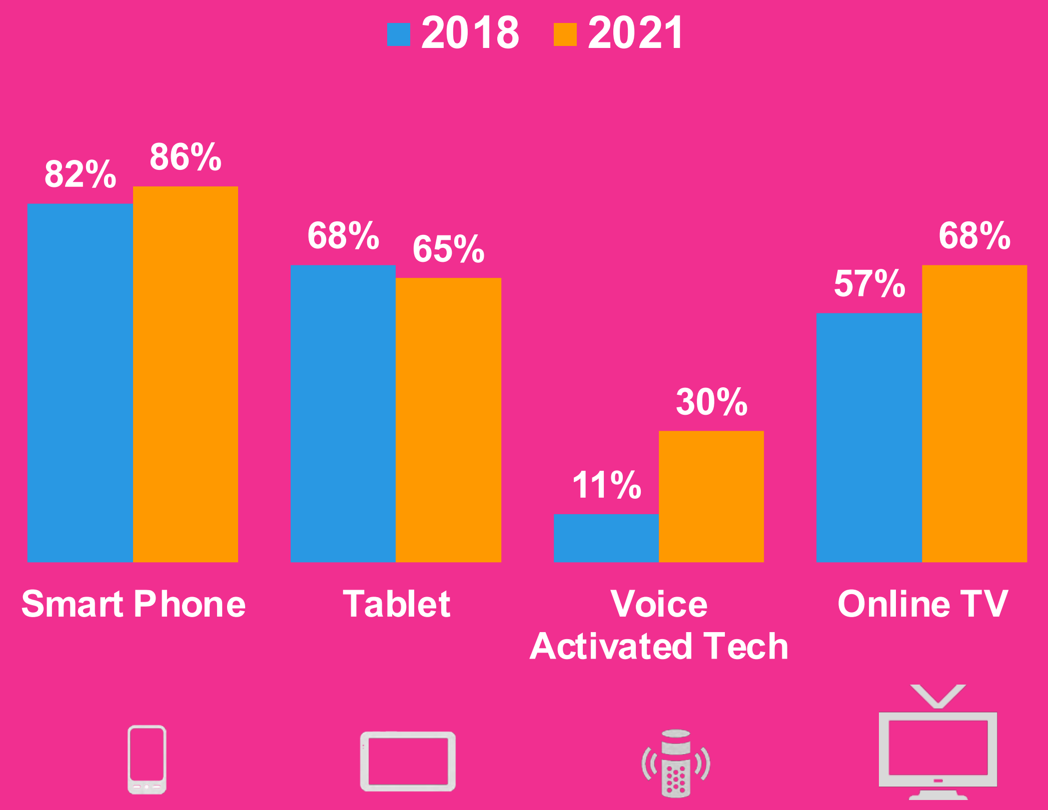
Widespread ownership of smartphones enables access to audio anytime, anywhere.

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

OWNERSHIP OF TECHNOLOGY



Source: JNLR 2021-2 Media Module (Oct+Dec'20 and May+Jun'21)
Base: All 15+

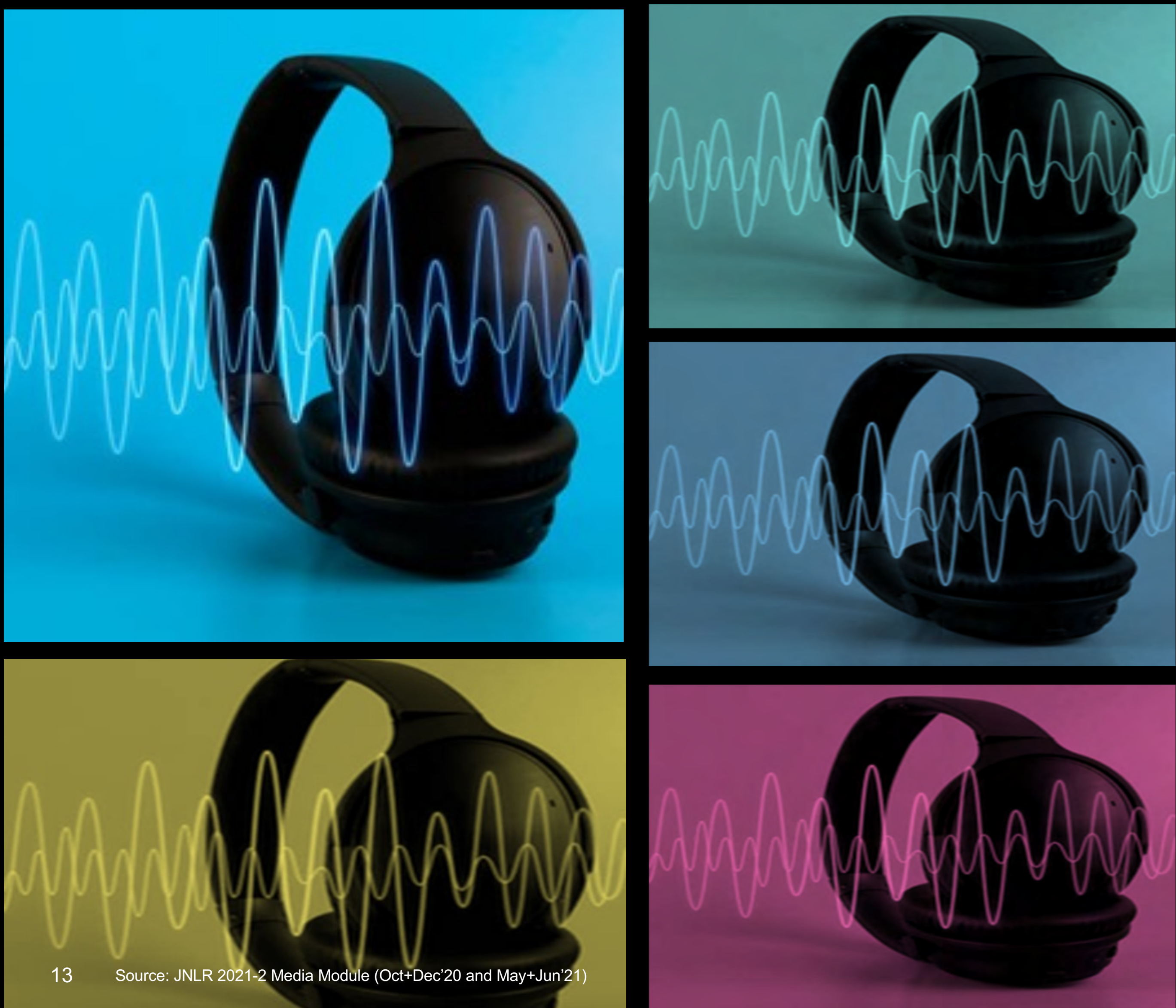
48%	38%
15-24	25-44
27%	8%
45-64	65+

Alexa, play …….

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

Ownership significantly higher among younger age groups.

Source: JNLR 2021-2 Media Module (Oct+Dec'20 and May+Jun'21)
Base: All 15+ x age group



OUR DAILY AUDIO ENVIRONMENT

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

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

Source: JNLR 2021-2 Media Module (Oct+Dec'20 and May+Jun'21)
Base: All 15+

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

Any Audio Activity – 'Yesterday' (Average Day)

72%	28%	6%	9%	5%	2%	3%
USED RADIO/ MUSIC PLAYER	USED SMART PHONE	USED SMART SPEAKER	USED PC/ LAPTOP	USED TABLET	USED TV	USED OTHER SYSTEM

Source: JNLR 2021-2 Media Module (Oct+Dec'20 and May+Jun'21)
Base: All 15+

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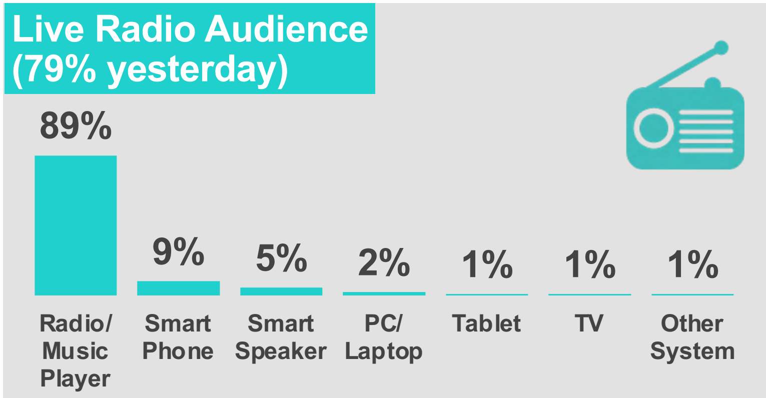

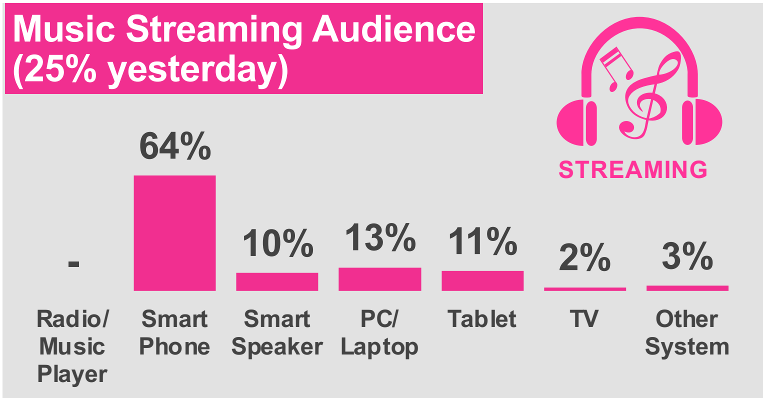

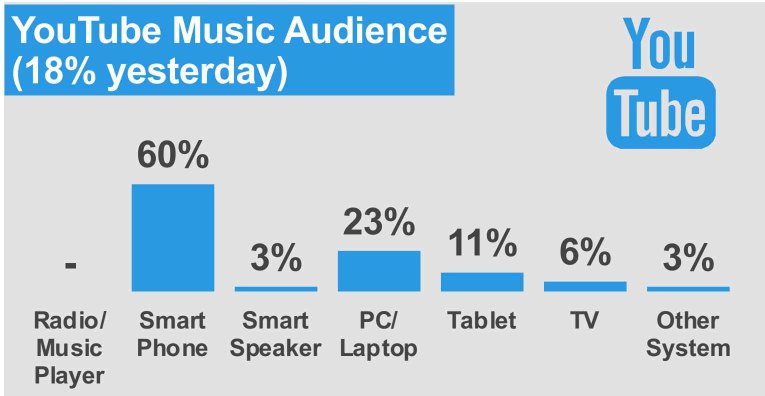

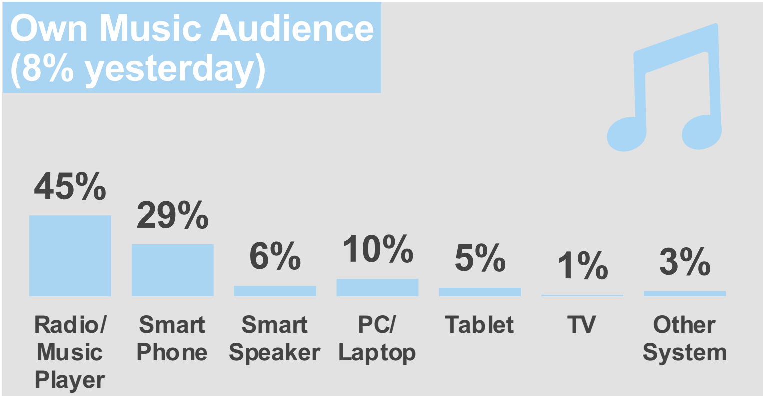

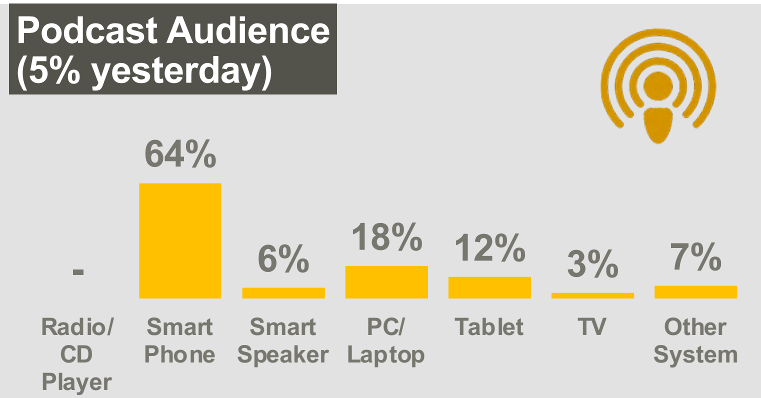

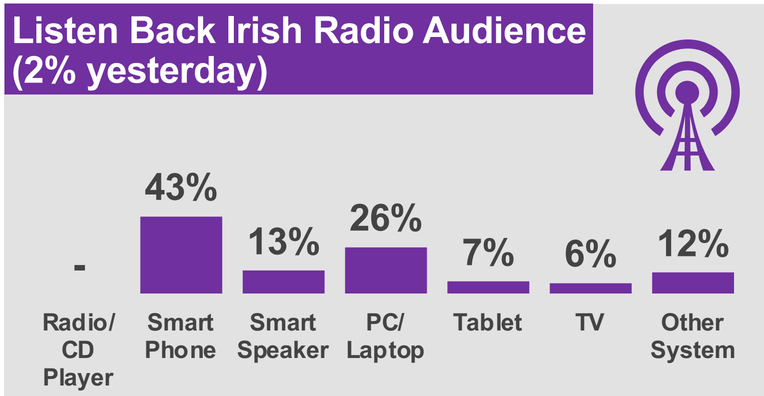

The smart phone is key device among audiences of on-demand audio

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)

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Most listening to audio material happens in the home

Any Audio Activity – 'Yesterday' (Average Day)

75% AT HOME

34% CAR/ VAN

9% WORK/ SCHOOL/ COLLEGE

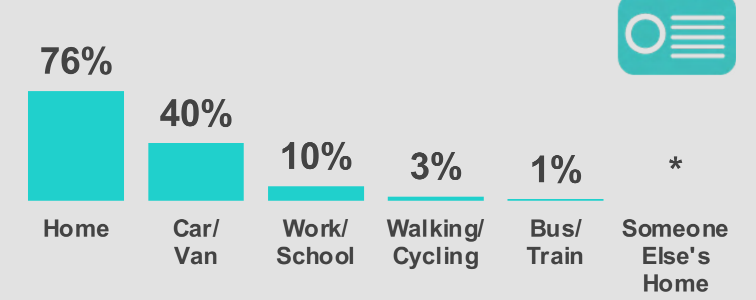
8% OUT WALKING/ CYCLING/ RUNNING

1% BUS/ TRAIN/ DART

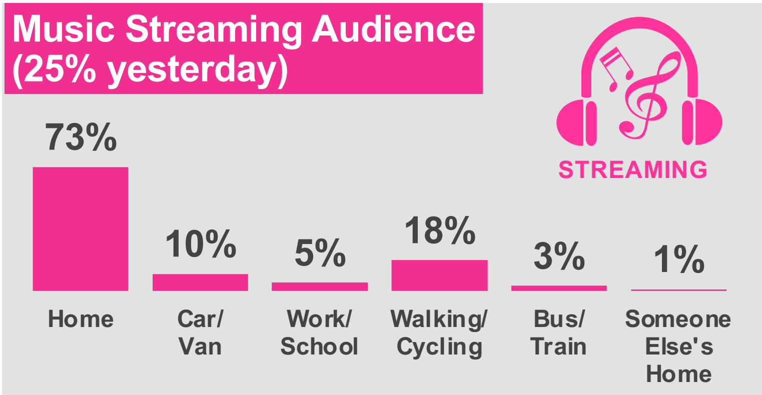
1% SOMEONE ELSE'S HOME

Source: JNLR 2021-2 Media Module (Oct+Dec'20 and May+Jun'21)
Base: All 15+

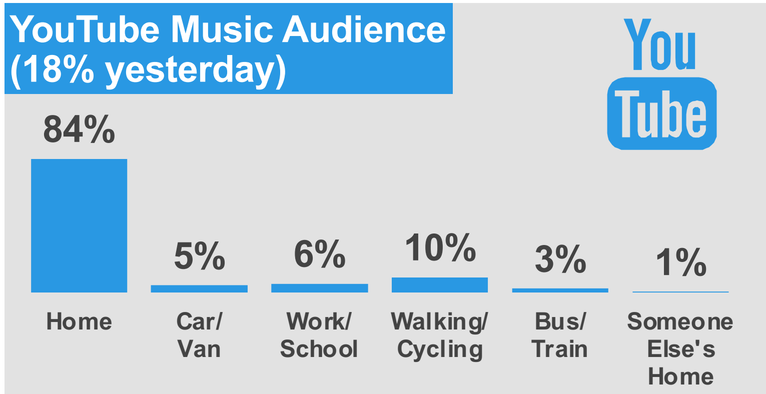
Live Radio Audience (79% yesterday)



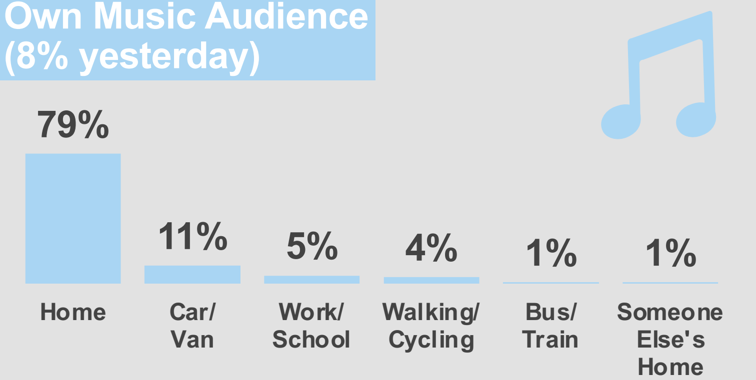
Music Streaming Audience (25% yesterday)



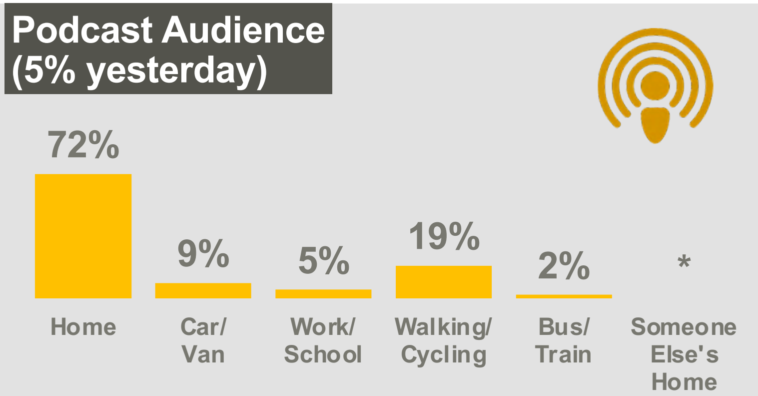
YouTube Music Audience (18% yesterday)



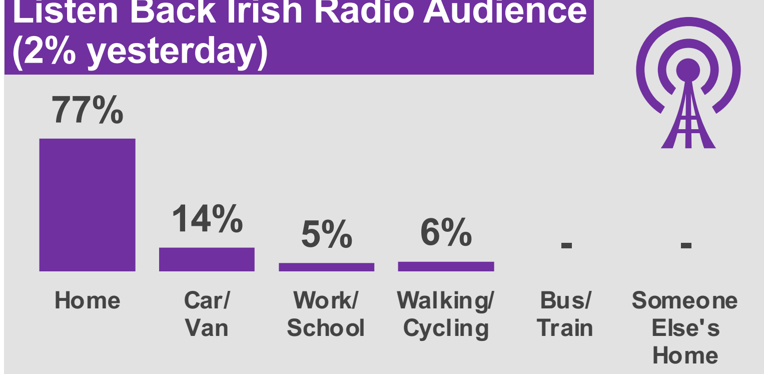
Own Music Audience (8% yesterday)



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)

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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	*	-

Source: JNLR 2021-2 Media Module (Oct+Dec'20 and May+Jun'21)
Base: All 15+

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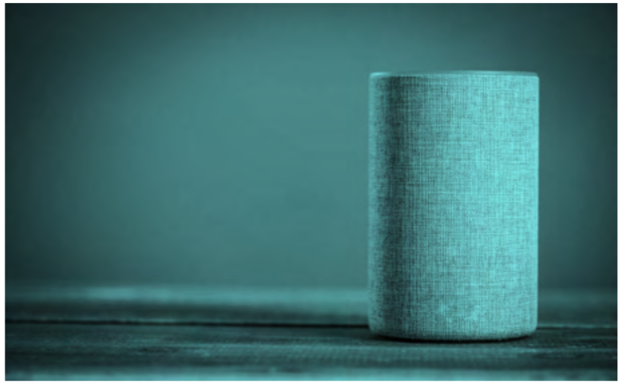

THE IRISH AUDIO MARKET

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

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

Source: JNLR 2021-2 Media Module (Oct+Dec'20 and May+Jun'21)
Base: All 15+

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%	37%	36%	22%	6%	17%
LISTEN TO LIVE RADIO	LISTEN TO MUSIC STREAMING	LISTEN TO YOUTUBE MUSIC	LISTEN TO OWN MUSIC	LISTEN BACK TO IRISH RADIO	LISTEN TO PODCAST

Source: JNLR 2021-2 Media Module (Oct+Dec'20 and May+Jun'21)
Base: All 15+

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

ALL 15+ WEEKLY LISTENING

<table>
<tr><th></th><th>2018</th><th>2019</th><th>2021</th></tr>
<tr><td>Radio</td><td>94%</td><td>93%</td><td>92%</td></tr>
<tr><td>Music Streaming</td><td>22%</td><td>26%</td><td>37%</td></tr>
<tr><td>YouTube Music</td><td>n/a</td><td>36%</td><td>36%</td></tr>
<tr><td>Own Music</td><td>38%</td><td>36%</td><td>22%</td></tr>
<tr><td>Listen Back</td><td rowspan="2">11%</td><td>6%</td><td>6%</td></tr>
<tr><td>Any Podcast</td><td>9%</td><td>17%</td></tr>
</table>

Source: JNLR 2021-2 Media Module (Oct+Dec'20 and May+Jun'21)
Base: All 15+

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

Source: JNLR 2021-2 Media Module (Oct+Dec'20 and May+Jun'21)
Base: All 15+ x age group

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AND NOW THE DAILY PICTURE

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

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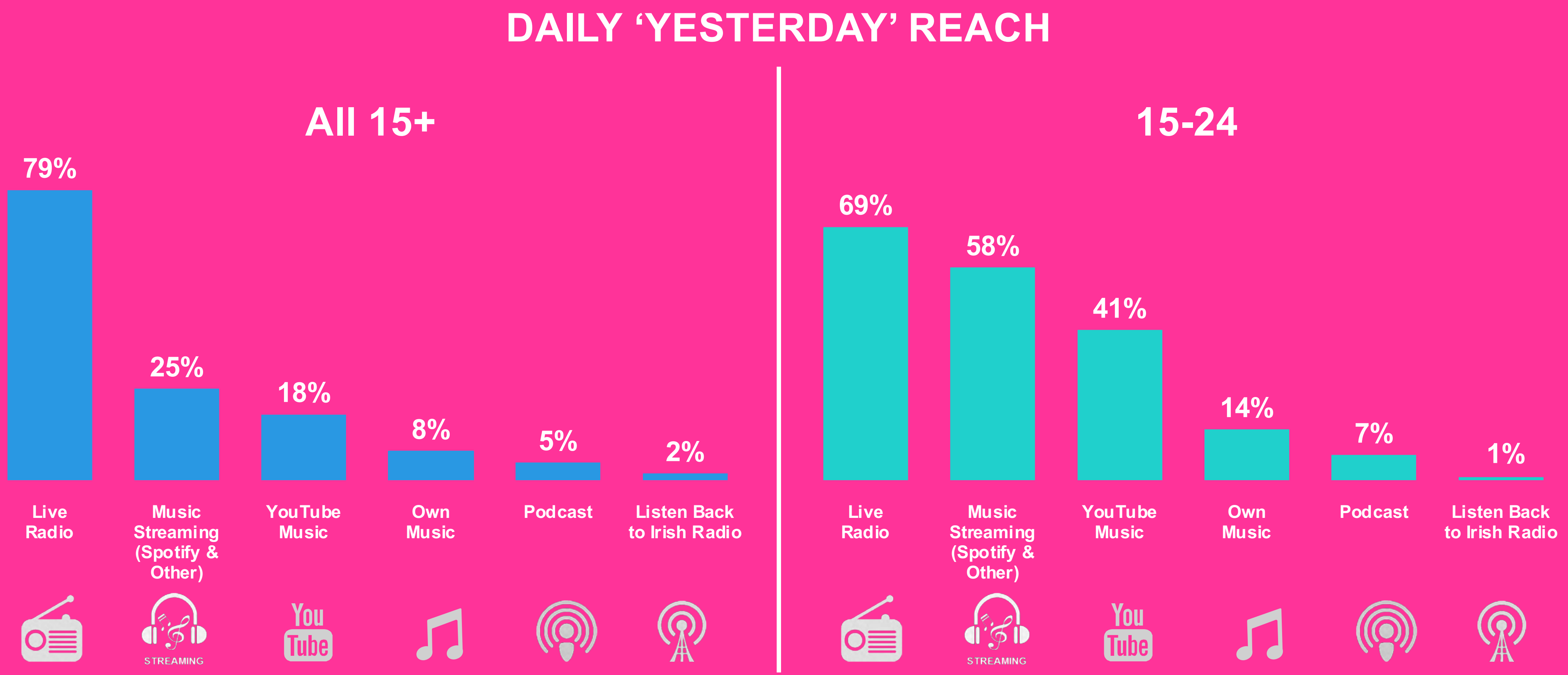
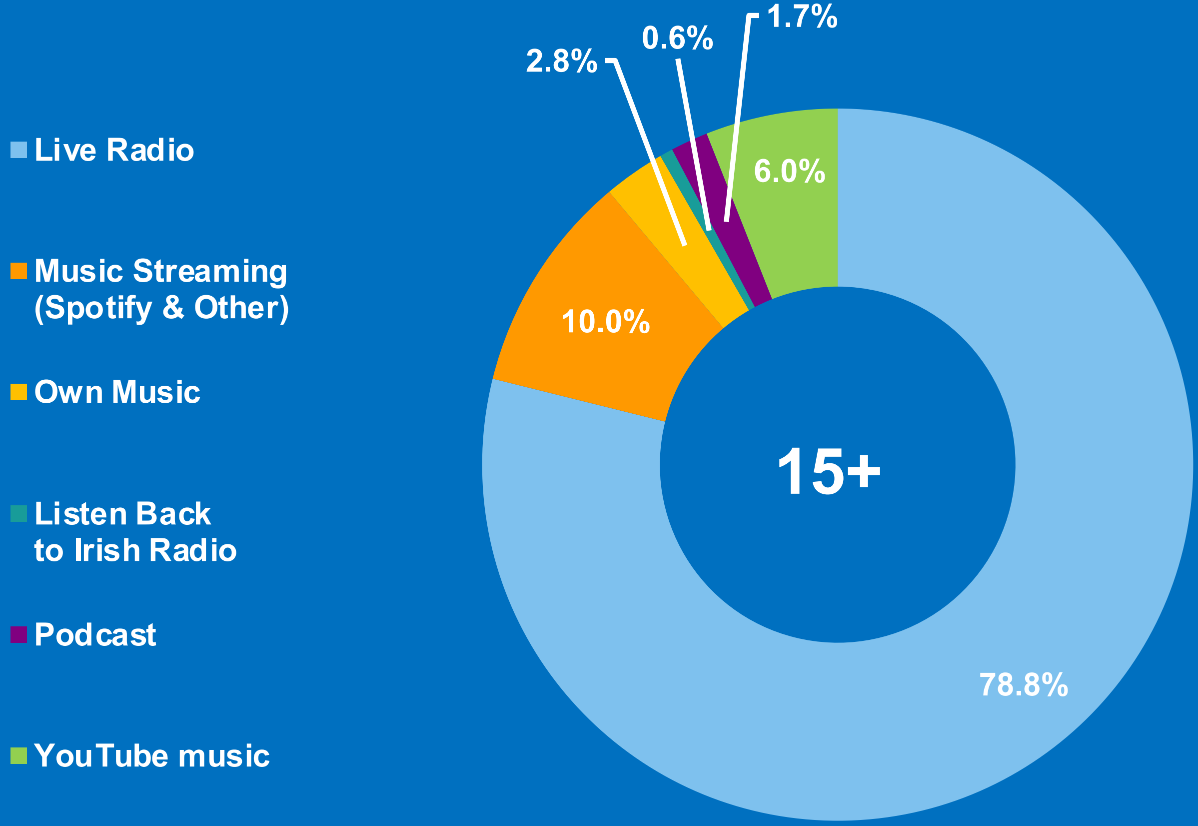
Radio is embedded in the daily lives of audiences, reaching more than three times as many people as audio streaming or other on-demand formats



Source: JNLR 2021-2 Media Module (Oct+Dec'20 and May+Jun'21)
Base: All 15+

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

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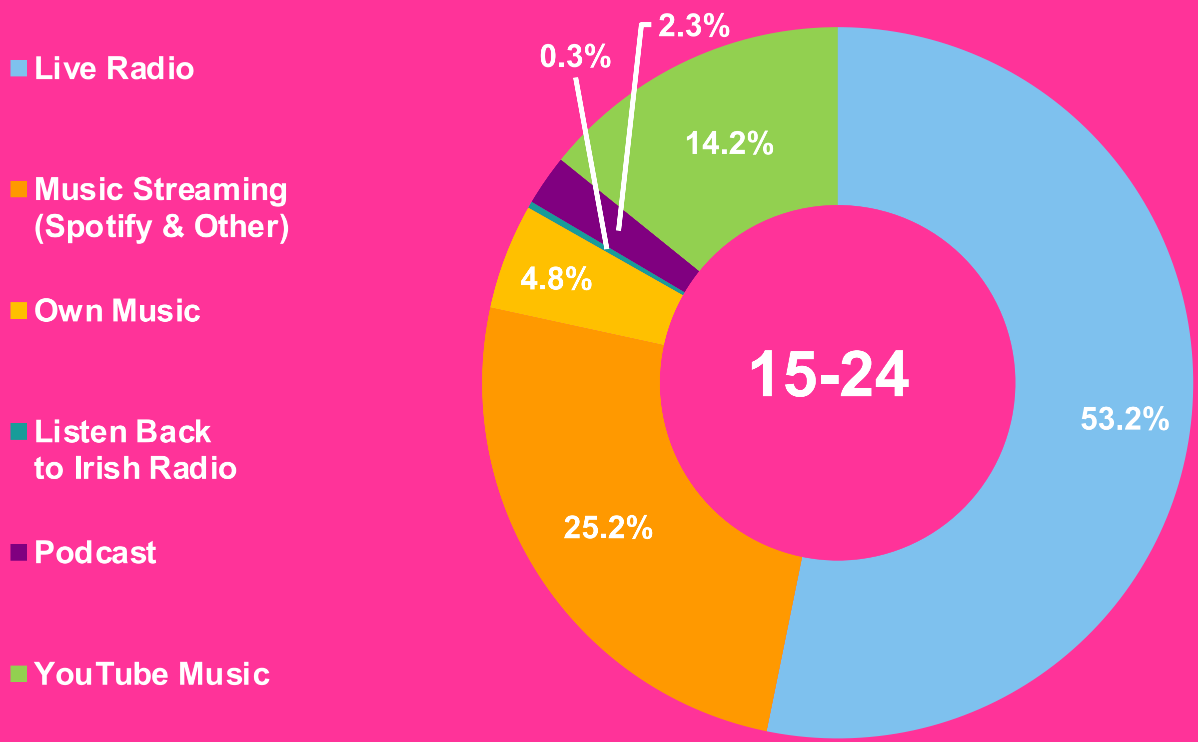
Source: JNLR 2021-2 Media Module (Oct+Dec'20 and May+Jun'21)
Base: All 15+ - estimate share of time spent

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

Source: JNLR 2021-2 Media Module (Oct+Dec'20 and May+Jun'21)
Base: All 15-24 - estimate share of time spent

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Audio – Estimated Share of Time Spent Daily

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

Source: JNLR 2021-2 Media Module (Oct+Dec'20 and May+Jun'21)
Base: All 15+ x age groups

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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.***

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