The Irish Audio Report 2024

RADIOCENTRE IRELAND

Ipsos B&A

Contents

Executive Summary

Against a backdrop of significant competition for our attention in the audiovisual sector, audio content reaches significant proportions of the adult population.

Irish audiences have significant digital connections – ownership of smart phones (92%), bluetooth wireless headphones (55%) and smart speakers (44%) enables easy access to audio content. In the home environment there has been considerable growth in smart speaker technology, from 11% in 2018, but the pace of acceleration has slowed over the intervening years.

Subscriptions to online audio platforms has dropped by 2% points in the last year, perhaps reflecting a move by users to cut back and streamline their paid-for media content.

In 2024 there is almost universal engagement in the audio market on a weekly basis and radio continues to be the dominant player in the sector, reaching nine-in-ten adults.

Audiences tend to listen to on-demand audio for shorter periods of time. The opposite is true for radio – more people listen to radio and stay tuned in for longer periods of time. This naturally impacts the measure of share of minutes where live radio achieves the largest share.

On an average day, in terms of estimated time spent listening, live radio has a share of 75%. Share to YouTube Music and Own music has dropped since 2023 with all other formats, including live radio, gaining a little.

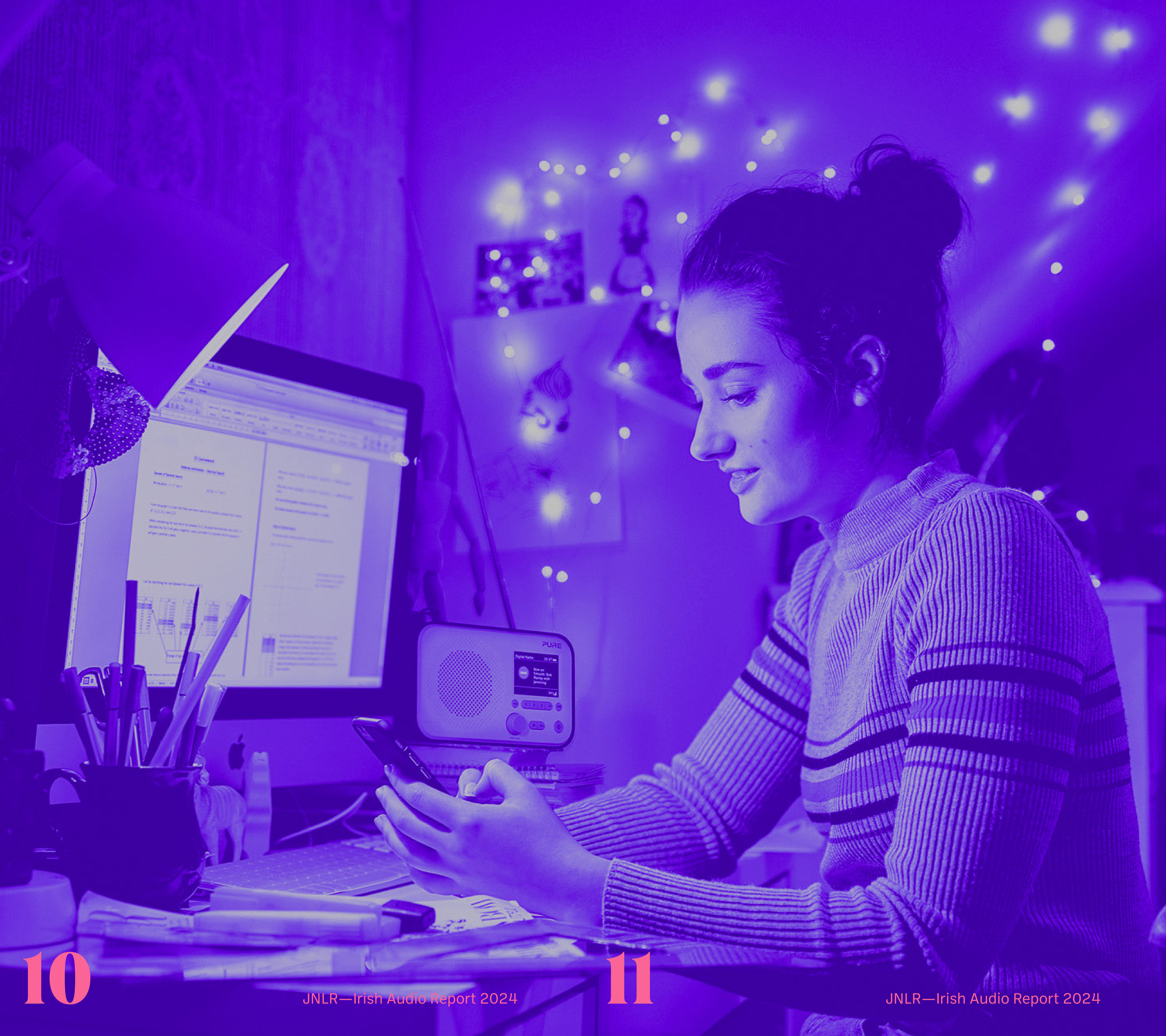
'At home' is a natural environment for listening to audio. However, listening in the car has increased to 43% (+2%) daily and peaks among those people in employment (51%).

30% of people use a smart phone to listen to audio content on an average day and this is the device of choice among the younger 15-24-year-old cohort (56%).

While ownership levels of smart speaker technology has settled at 44% this year, 10% of the population use this device to listen to audio content daily.

01

Ownership of Technology


PURE

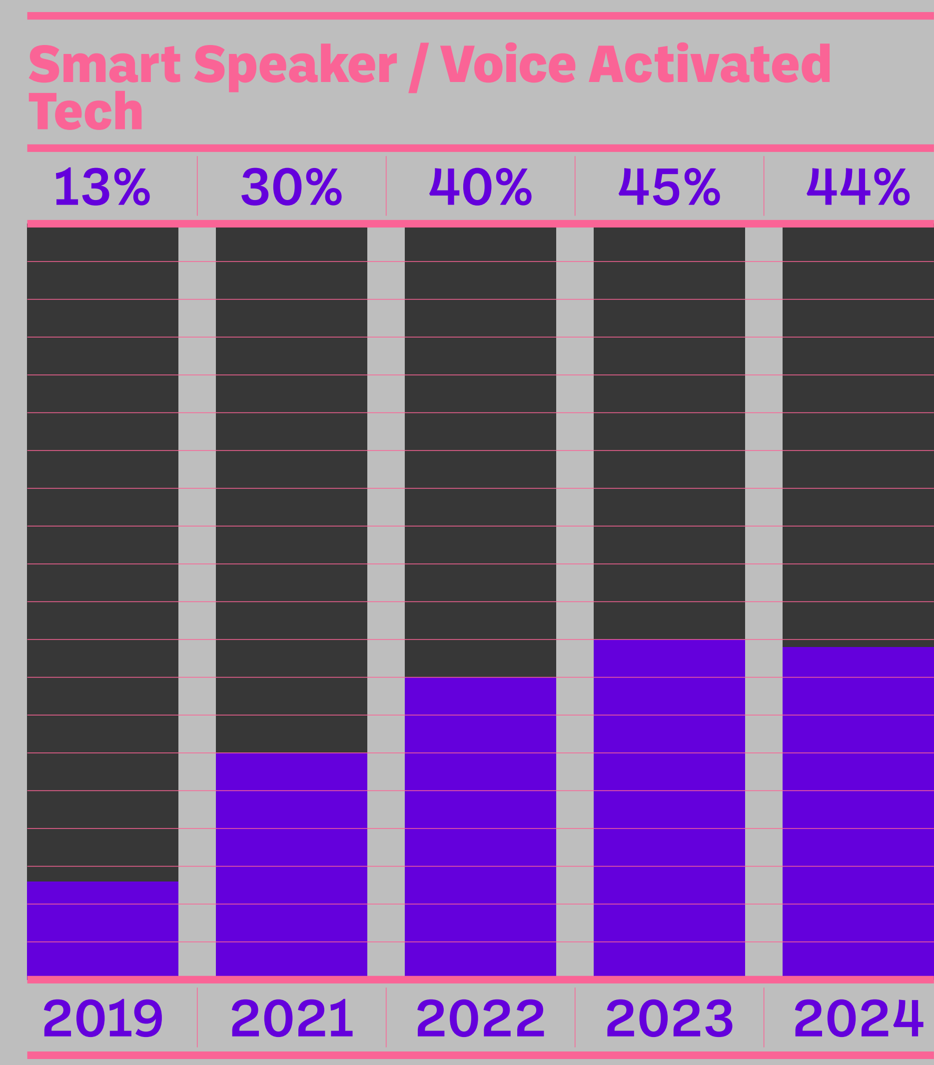
Technology Enables Access to Audio Content

Irish people are digitally connected with significant levels of ownership of technology. This technology facilitates access to media content at home and on the go.

The report shows that smart phone ownership has reached a high of 92%. Unsurprisingly, almost all 15-24's own a smart phone now whereas ownership levels are lowest among the older 65+ group (72.5%). Further empowering audiences on the move, we see that more than half of the population (55%) own Bluetooth enabled wireless headphones, up 3% points since this question was first introduced in the 2023 module. Once again age is the determining factor here – 74% of those aged 15-44 own wireless headphones compared to 36% among older people aged 45+.

In the home environment, it is interesting to note the considerable growth in ownership of Voice activated technology or smart speakers such as Alexa or Google Home. When we first measured this technology in 2018, just one in ten people owned a smart speaker. This now stands at 44% in 2024. However, the pace of acceleration has slowed over the intervening years and appears to have plateaued as the chart on page 13 illustrates.

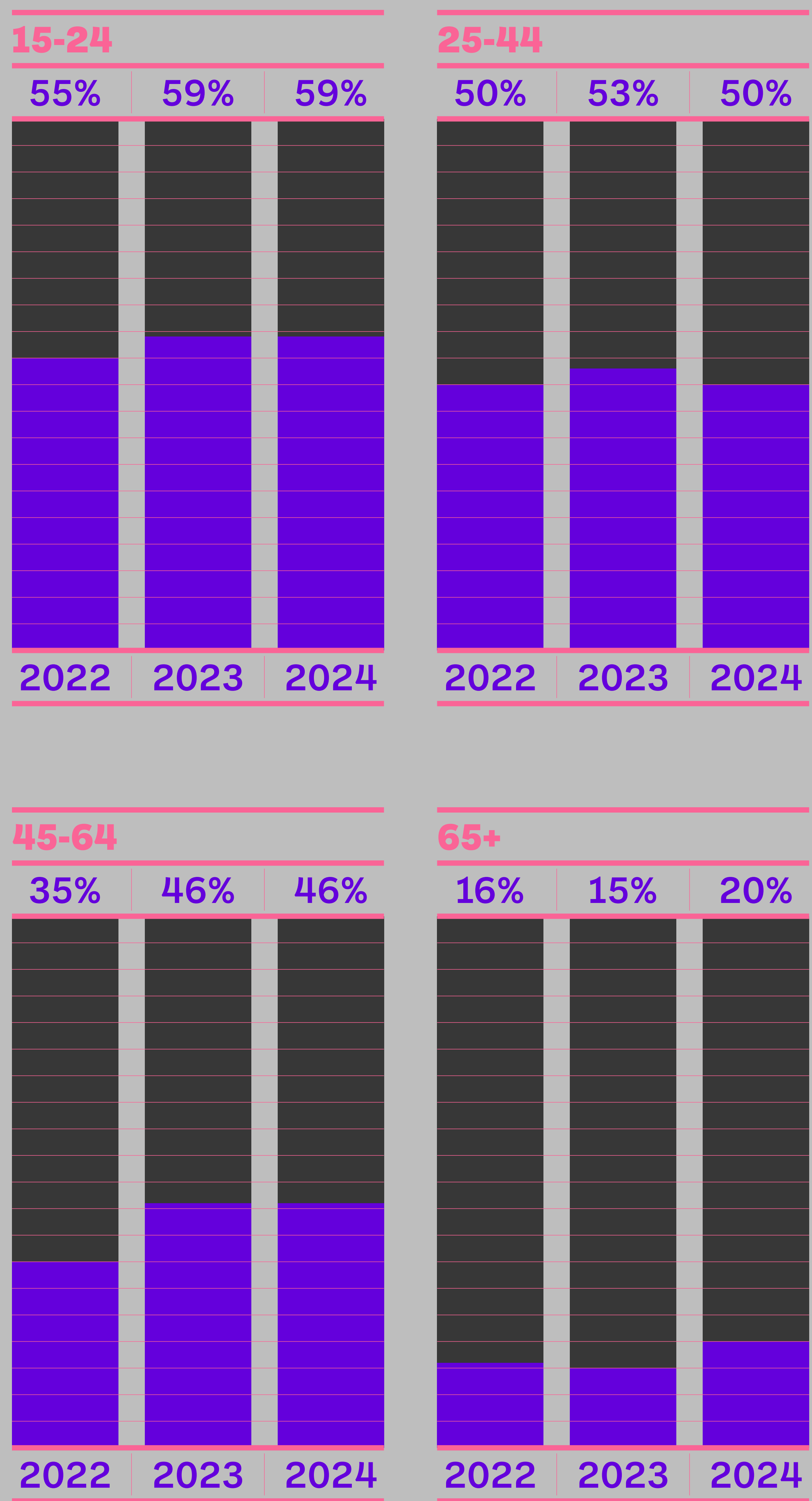
Ownership of Smart Speaker



Source: JNLR 2024-2 Audio Module
(Apr '24 to Jun '24 – 3 mth data) Base: All 15+

As with other technology, product ownership is highest among younger cohorts. However, although ownership levels are lower among the older 45+ group, there is evidence of more significant growth among these older groups, as the chart on page 14 illustrates.

Ownership of Smart Speakers by Key Age Groups



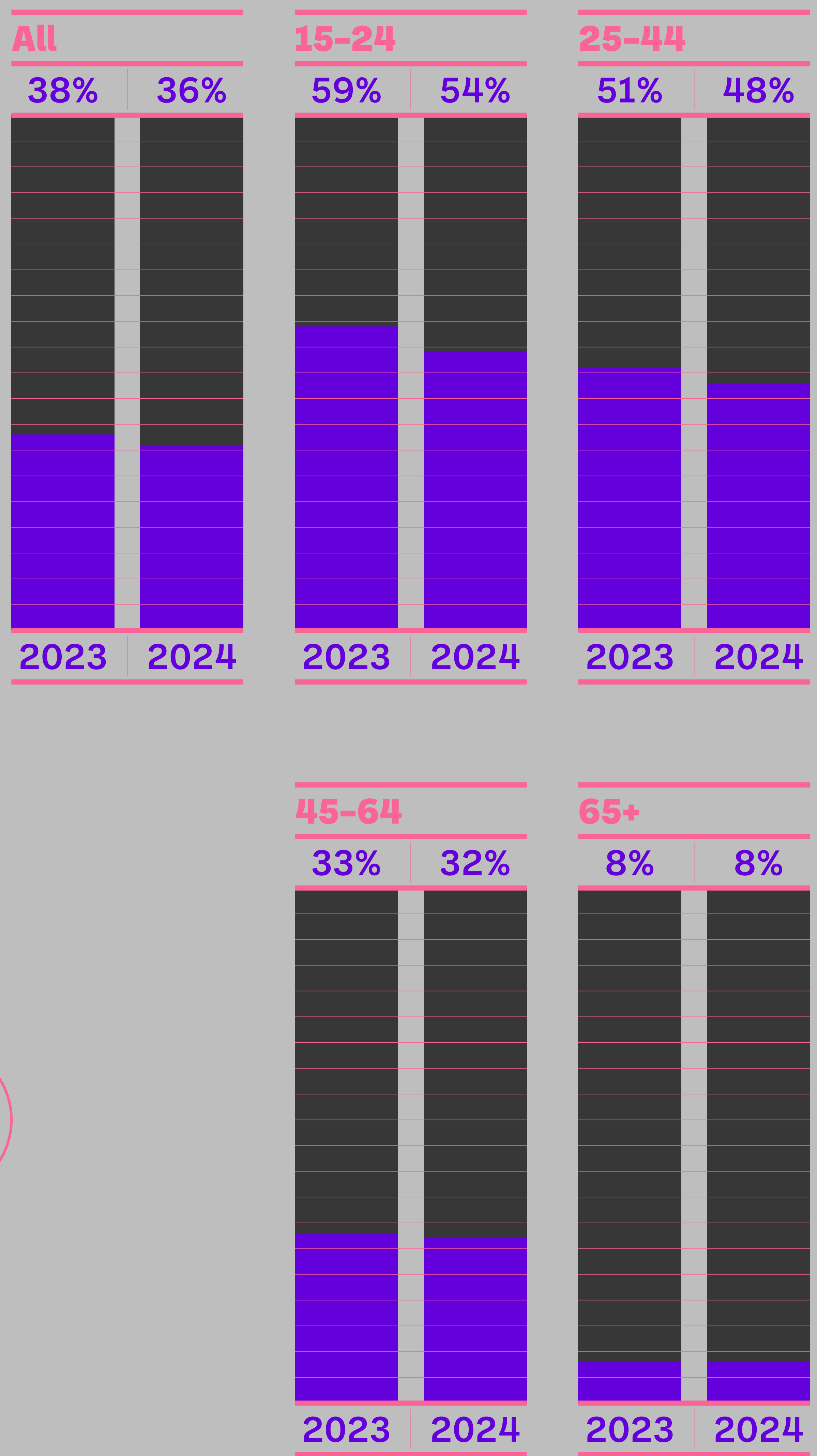
Source: JNLR 2024-2 Audio Module
(Apr '24 to Jun '24 – 3 mth data) Base: All 15+

Subscriptions to Online Audio Platforms

Irrespective of levels of usage, over one-third of the population (36%) say they have a paid subscription to one or other of the following - audio streaming services, (such as Spotify premium), any podcast or, YouTube premium. Interestingly, this subscription level has dropped by 2% points since first measured. In the context of the cost-of-living crisis experienced over the past year or more, this could be a reflection of users cutting back on discretionary spending and streamlining their paid-for media content. The chart on on page 16 illustrates ownership of subscriptions by key age groups.

Source: JNLR 2024-2 Audio Module
(Apr '24 to Jun '24 – 3 mth data) Base: All 15+
Note: Any subscription to audio streaming; YouTube premium, or any podcast

Paid Subscriptions to Online Audio Platforms



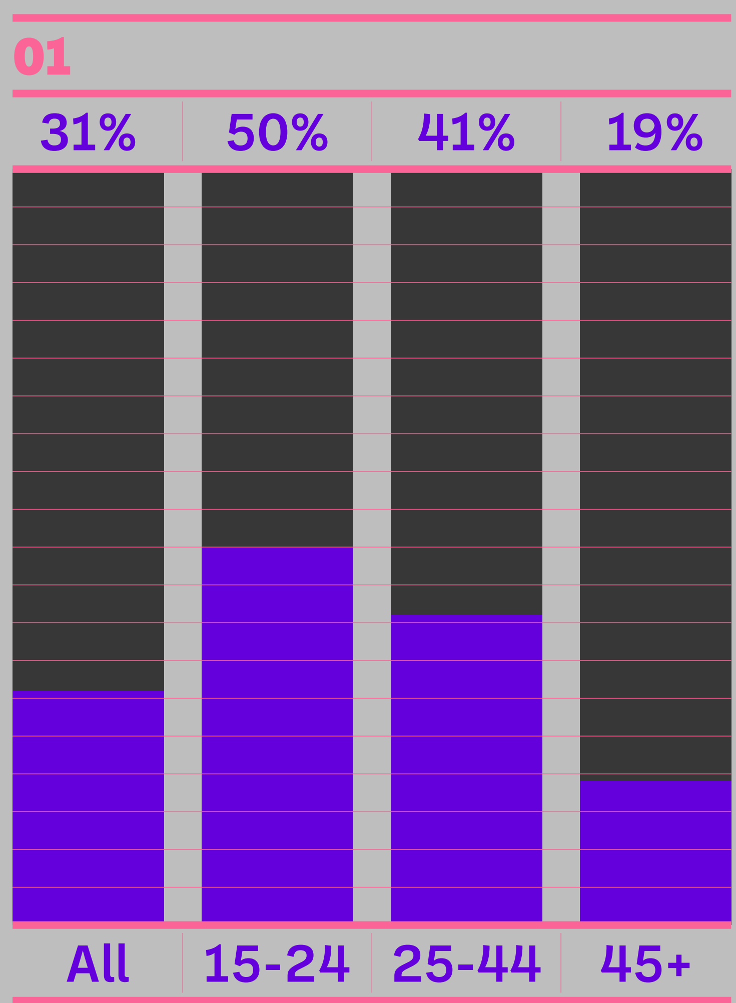
Source: JNLR 2024-2 Audio Module
(Apr '24 to Jun '24 – 3 mth data) Base: All 15+
Note: Any subscription to audio streaming; YouTube premium, or any podcast

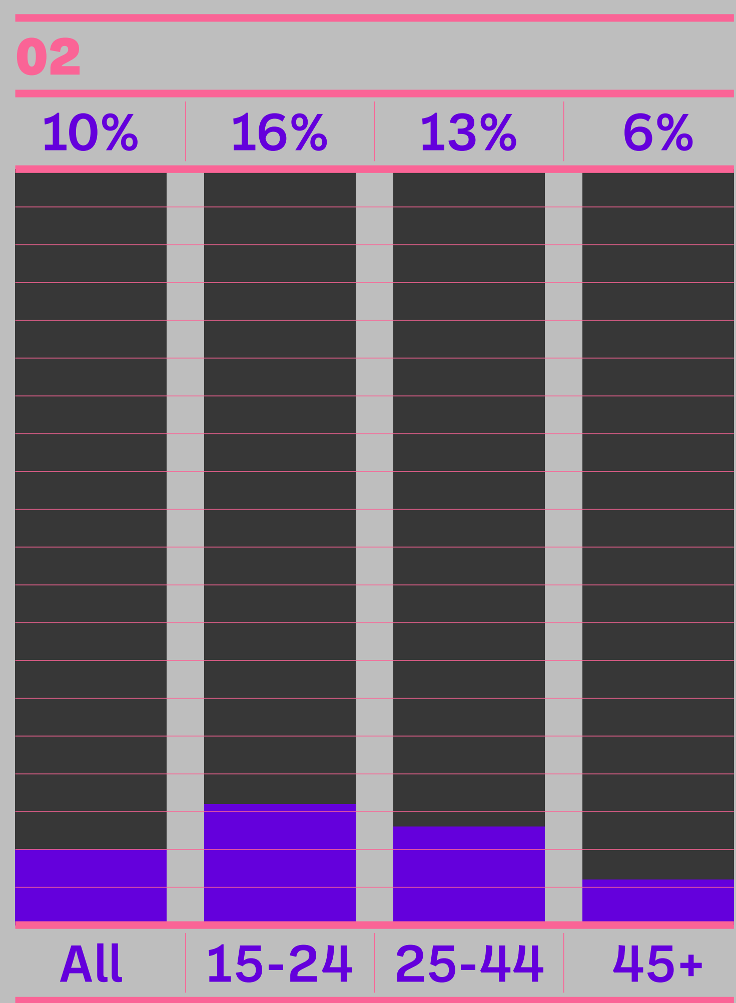
Younger People More Likely To Pay For Audio Content

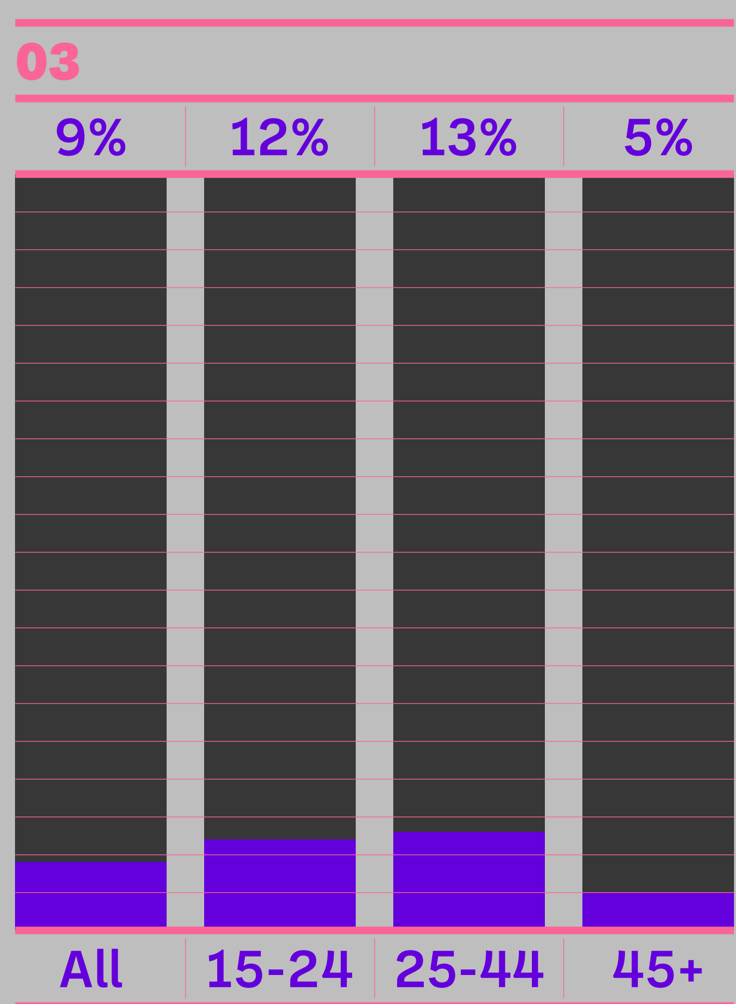
In terms of the type of subscriptions measured in the survey, the leading format is Audio Streaming. Currently, almost one third of the population (31%) subscribe to an audio streaming platform such as Spotify Premium. This is down 2% points since last year. Again, it is younger people who are more likely to pay – half of all 15-24-year-olds (50%) subscribe to such a streaming platform and 41% of those aged 25-44 years. Only 19% of the older age group, aged 45+, are currently subscribing and most of these are in fact aged less than 65.

One-in-ten people (10%) pay a subscription to YouTube Premium reflecting a 3%-point drop in the last year. Again, the average is higher among the younger 15-24-year age group. A similar proportion of the population (9%), subscribe to at least one podcast (down 2% points). In this case, the highest incidence is among the 25-44-year age group (13%) - marginally ahead of the younger cohort. The chart on page 18 illustrates.

Younger People More Likely To Pay For Audio Content





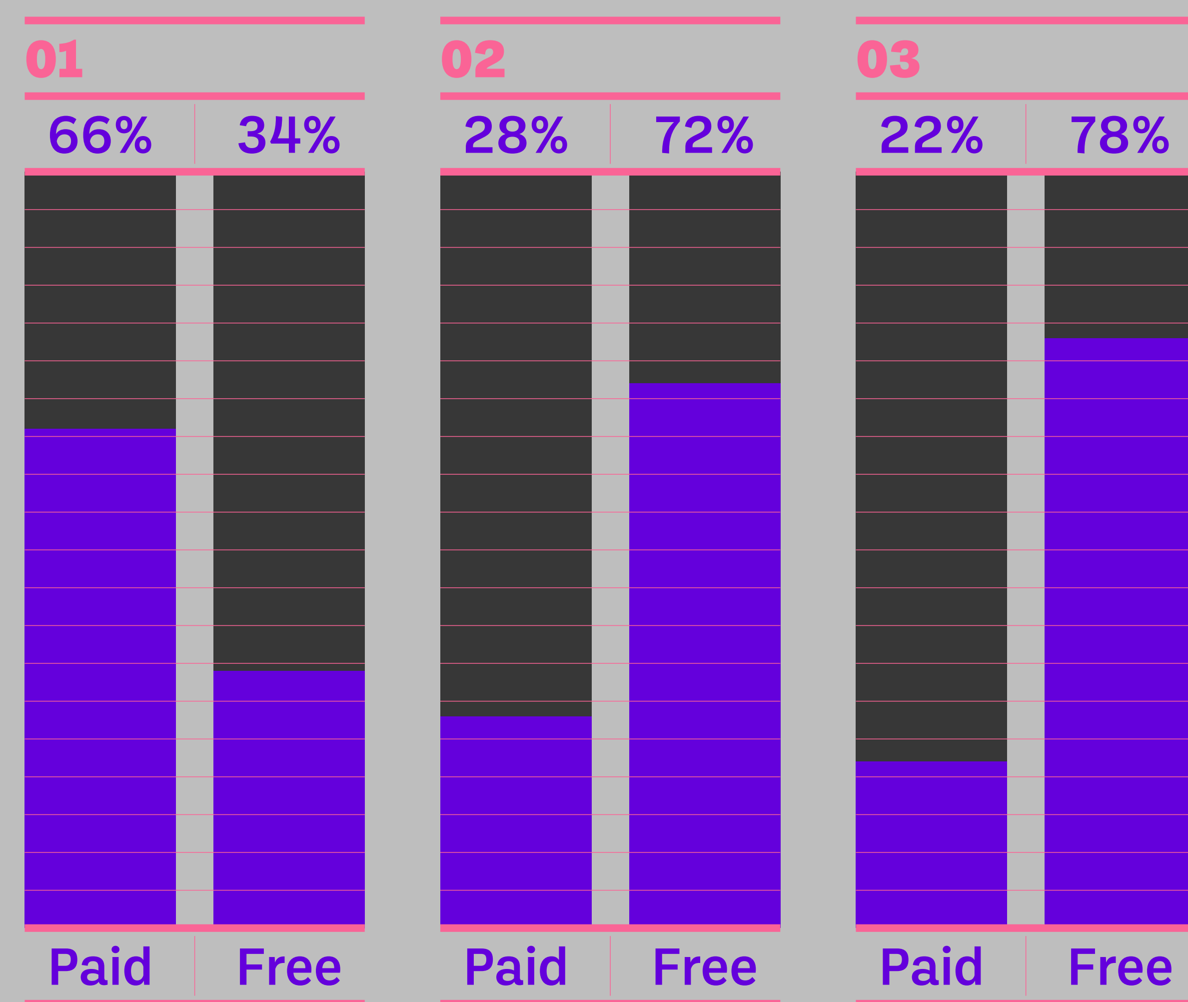


Source: JNLR 2024-2 Audio Module
(Apr '24 to Jun '24 – 3 mth data) Base: All 15+

01	Paid Subscription Audio Streaming (such as Spotify Premium)
02	Paid Subscription YouTube Premium
03	Paid Subscription—any podcast

The average number of subscriptions, among subscribers, is 1.4. When we analyse weekly audio consumption patterns, two-thirds (66%) of weekly streaming listeners are paid-up subscribers – we assume these listeners use their premium service to listen. On the other hand, only 22% YouTube weekly listeners are paid subscribers to the premium service. Podcast subscribers will undoubtedly listen to a mix of paid and free podcasts – in this case 28% of weekly podcast listeners are subscribers to at least one podcast.

Profile Listeners Past Week



01	Audio Streaming Listeners
02	Podcast Listeners
03	YouTube Listeners

Source: JNLR 2024-2 Audio Module
(Apr '24 to Jun '24 – 3 mth data) Base: All 15+

02

The Audio Market

Audio Listening

On the measure of average weekly listening (listening in the past week) there is almost universal listening to audio content. 4.2 million listeners, or 97% of the adult population, tune into audio each week.

In this sector, live radio continues to be the dominant form of listening – 90% tune into live radio on a weekly basis compared to 55% to on-demand, online audio.

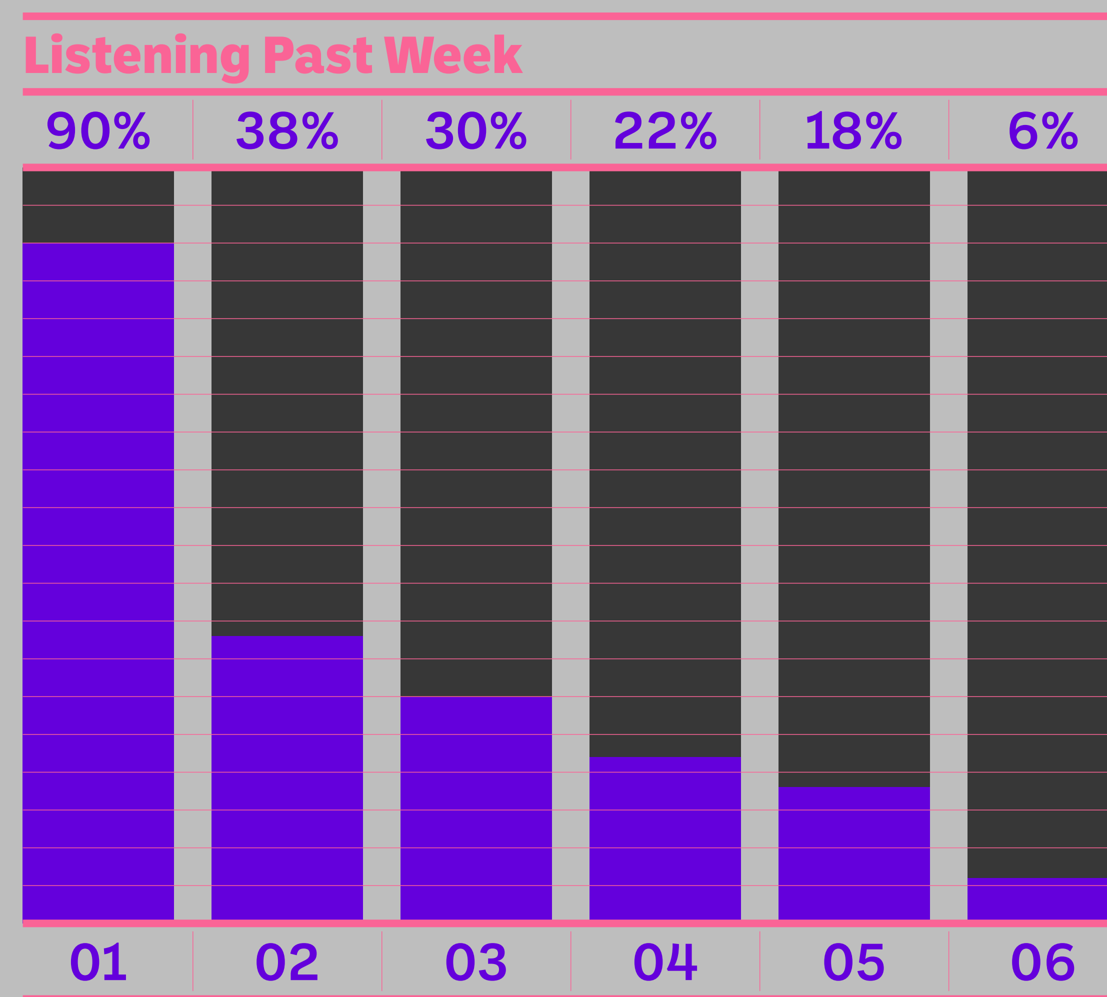
In such a busy environment, it is interesting to see that radio continues to attract sizable audiences. This is not surprising. By its nature radio lends itself to larger audiences. Radio is easy to tune into – it's available at the touch of a button. It is not appointment listening and we don't need to search for content when we switch on the radio. And radio also delivers on some key human needs, providing a social space and connection to the outside world.

Almost universal listening 4.2 million people tuning in.

97% listened to audio content in past WEEK.

The Audio Market Weekly Listening Patterns

Live radio is the dominant form of listening – 90% tune into live radio on a weekly basis compared to 55% to on-demand. However, listening levels across all formats, live radio and digital, are somewhat lower than patterns seen in 2023. Live radio has dropped by 2% points to 90% and reach to any on-demand online audio has also dropped – in this case by 2.5% points. The chart below illustrates listening levels to the various audio formats measured.



01	Listen to Live Radio
02	Listen to Music Streaming
03	Listen to YouTube Music
04	Listen to Podcast
05	Listen to Own Music
06	Listen Back On-Demand to Irish Radio

Source: JNLR 2024-2 Audio Module
(Apr '24 to Jun '24 – 3 mth data) Base: All 15+

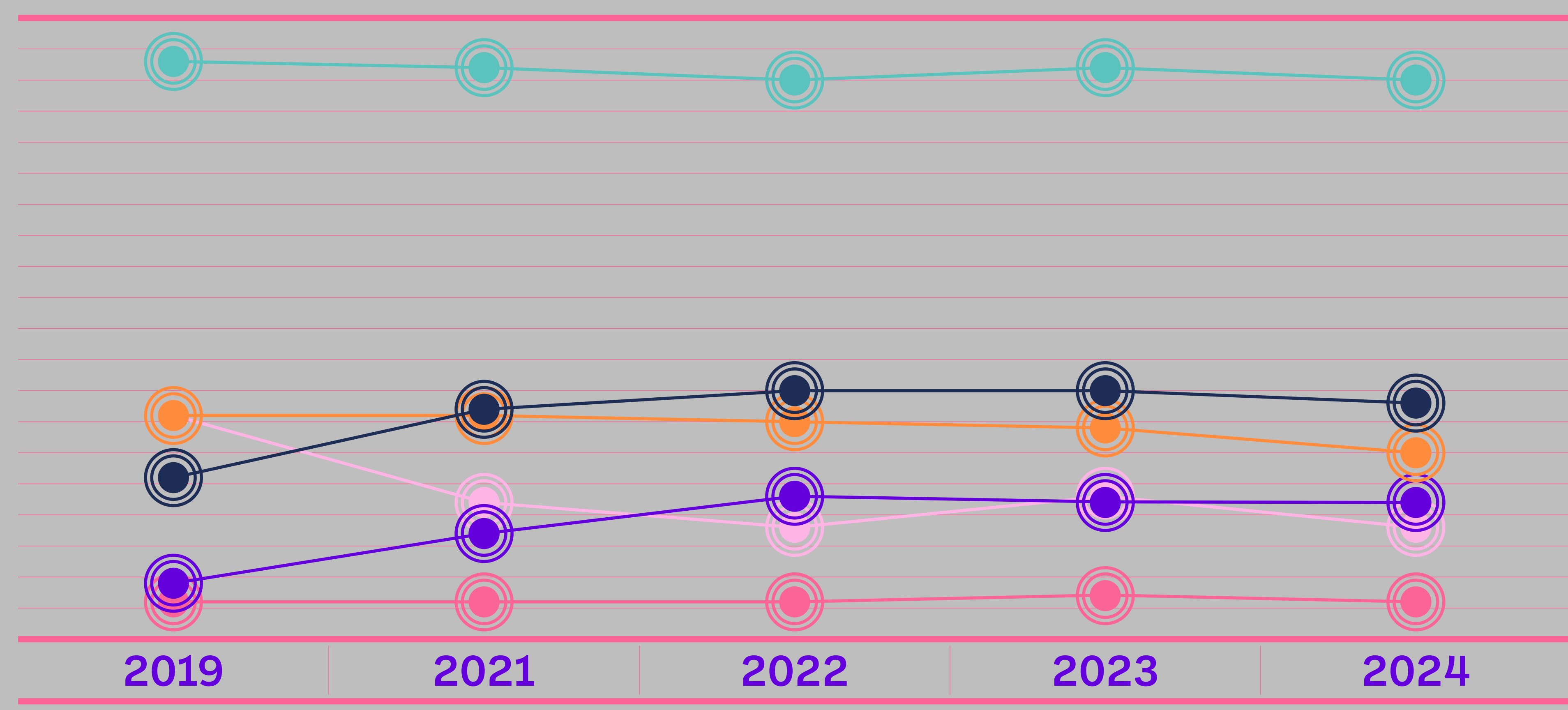
Looking at the broader trend over the past five years, while there has been some erosion to the listening levels for live radio, and the numbers listening back to radio have remained steady over the period, the changes in behaviour are perhaps more dynamic when considering other formats, undoubtedly driven by innovation in technology which has changed the media environment entirely. For example, in 2019 more than one-third of us were listening to our own music archives – whether on CD, vinyl or downloads. Five years on, this figure is now halved (18%) and music streaming has effectively replaced much of our personal music archives.

Among the younger markets, 15-24 and 25-44-year-olds, the patterns of listening are perhaps changing at a faster pace than for older cohorts. Interestingly, although reach to on-demand online audio is highest among this group, there is also a drop in listening over the years, from 91% in 2022 to the current reach of 82%.

Following live radio, music streaming and YouTube music are the next most listened to formats among this younger cohort. Again, there is a drop in weekly listening to both formats although YouTube suffers the biggest loss – down 16% points since 2020. Perhaps this format, effectively an audio/visual format, is more impacted by competing video content providers?

Half of all 25-44 year olds listen to a music streaming service on a weekly basis, down 2% points since 2023 but a return to the more normal pattern as seen in 2020/21. YouTube also loses reach among this audience, down 9% points since the high mark in 2020/21. Interestingly, podcast listening is highest among this market reaching 33% in 2024 (+12% points since 2020/21).

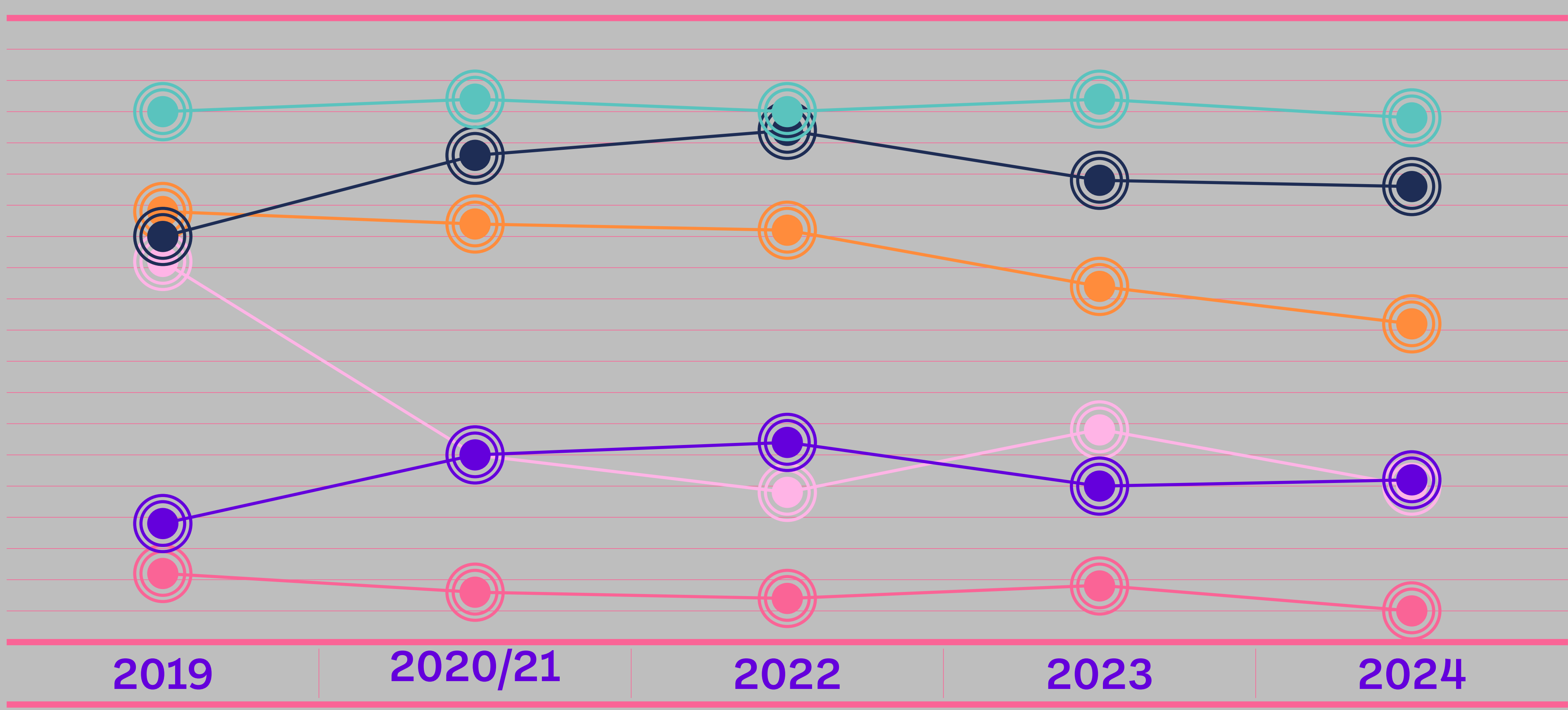
All 15+ Listening Past Week



Live Radio	90%
Music Streaming	38%
YouTube Music	30%
Any Podcast*	22%
Own Music	18%
Listen Back	6%

Source: JNLR 2024-2 Audio Module
(Apr '24 to Jun '24 – 3 mth data) Base: All 15+

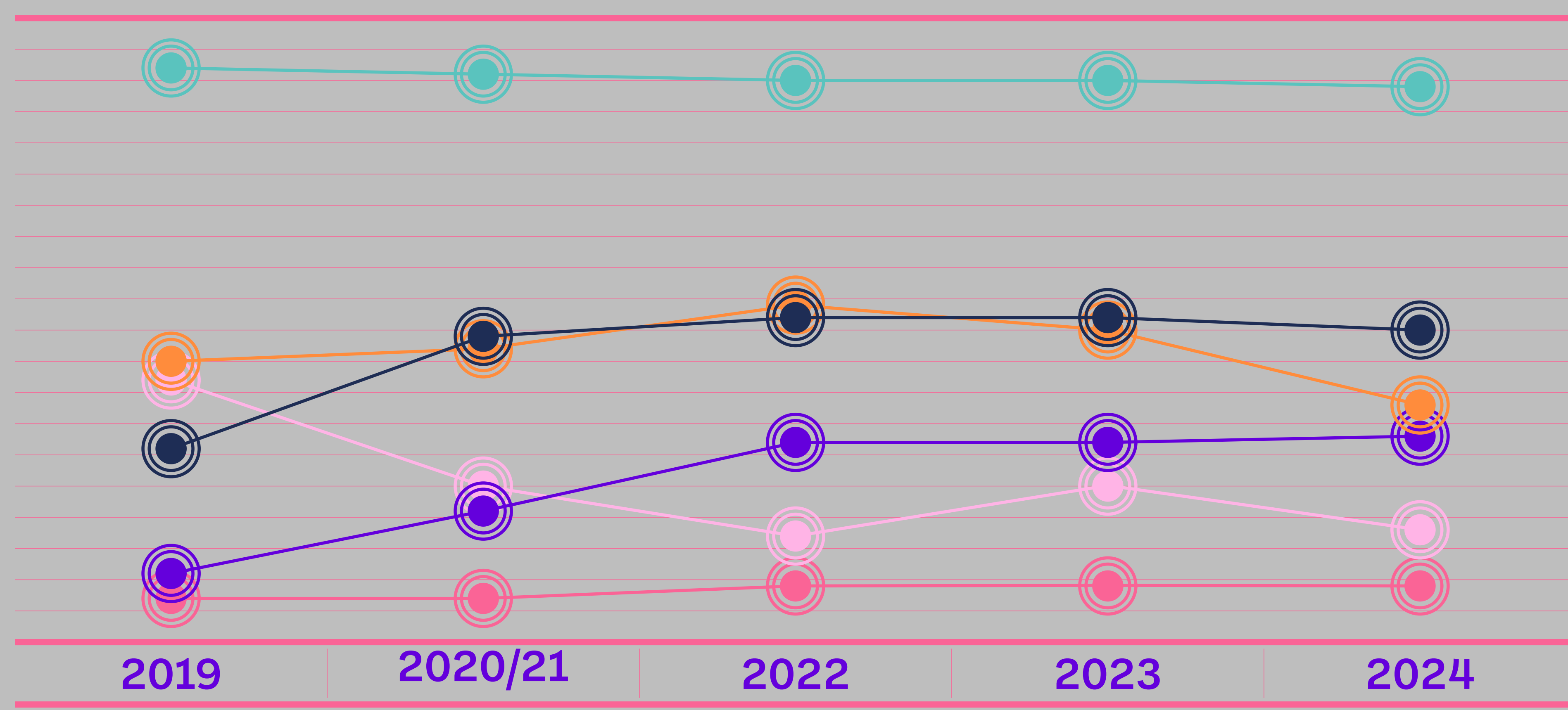
All 15-24's Listening Past Week



●	Live Radio	84%
●	Music Streaming	73%
●	YouTube Music	51%
●	Any Podcast*	26%
●	Own Music	25%
●	Listen Back	5%

Source: JNLR 2024-2 Audio Module
(Apr '24 to Jun '24 – 3 mth data) Base: All 15+

All 25-44's Listening Past Week



●	Live Radio	89%
●	Music Streaming	50%
●	YouTube Music	38%
●	Any Podcast	33%
●	Own Music	18%
●	Listen Back	9%

Source: JNLR 2024-2 Audio Module
(Apr '24 to Jun '24 – 3 mth data) Base: All 15+

The Audio Market - Daily Listening Patterns and Time Spent Listening

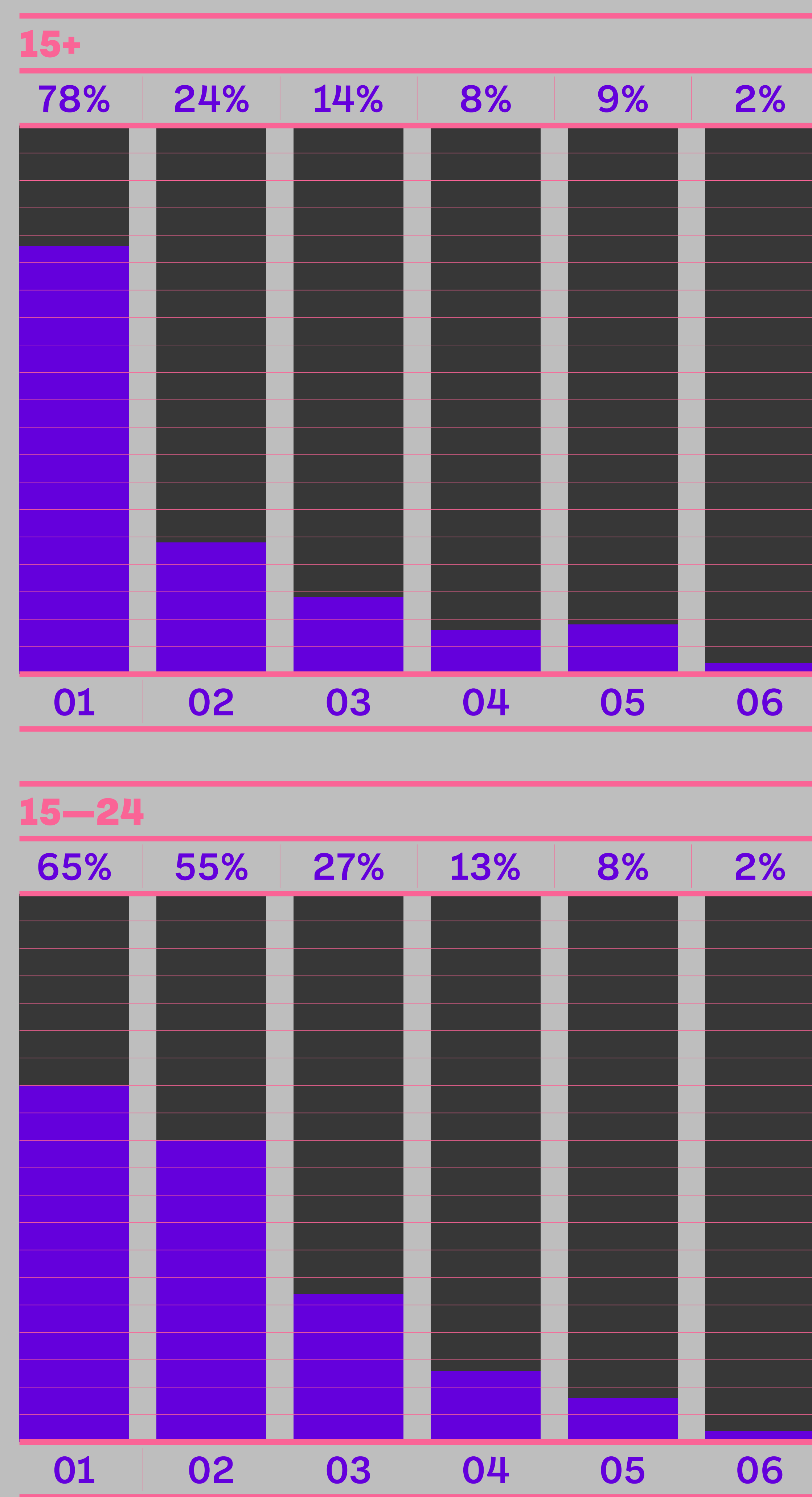
In terms of daily listening patterns (defined as average ‘yesterday’ listening) overall, live radio is the number one choice among the population, by a significant margin. Indeed, it is the leading format across all age cohorts.

Daily listening to live radio now stands at 78% compared to 24% for music streaming. However, the latter format is a significant competitor among the younger 15-24-year-old cohort (55%).

The survey also estimated time spent listening. For this analysis, we see that people tend to listen to on-demand for shorter periods of time compared to live radio. This makes intuitive sense - for on-demand content a listener actively chooses to listen to a podcast or playlist - they search for the content to suit the mood or occasion – to escape, relax and discover. It is effortful. And in the case of podcasts, episodes can be short.

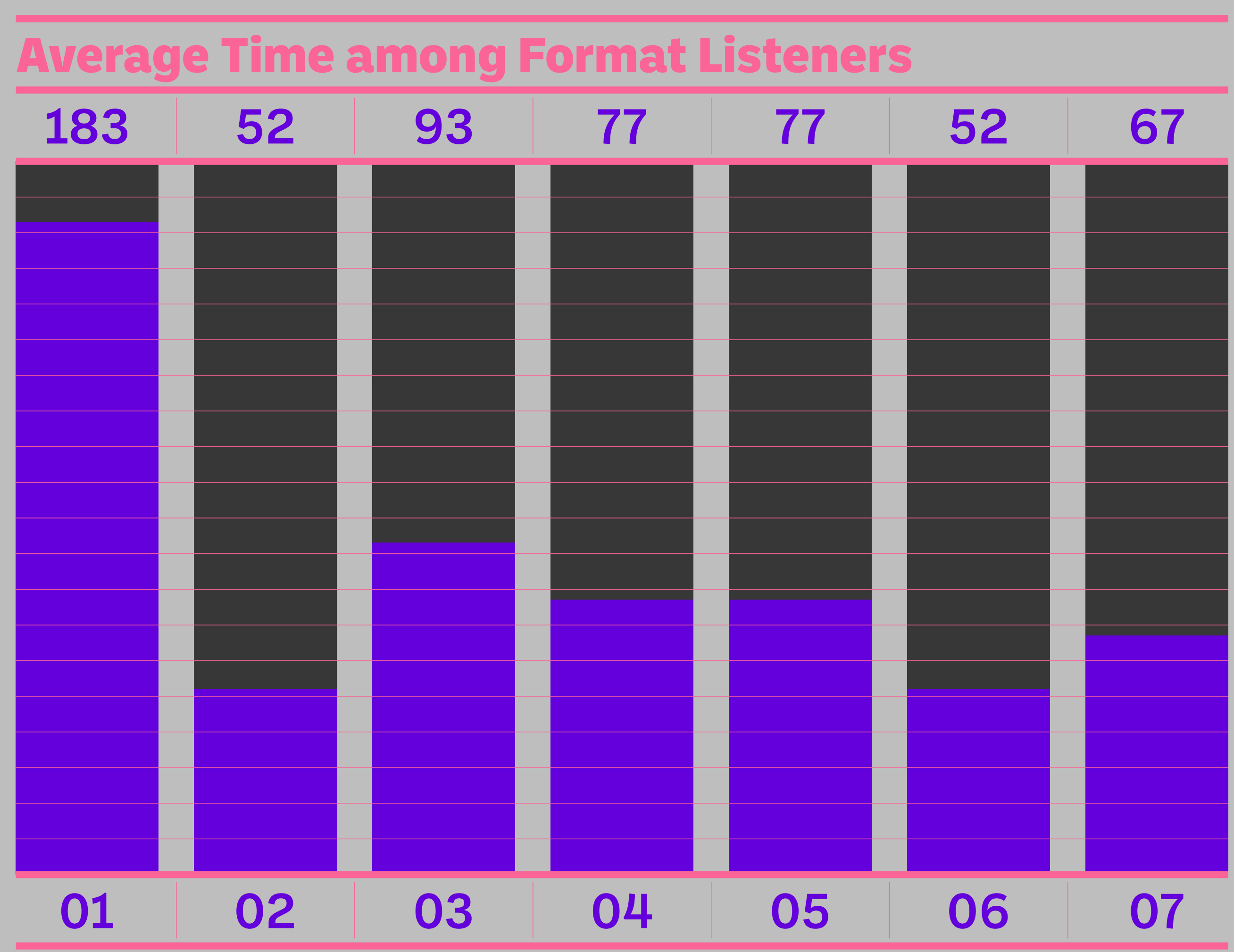
Audio Reach, Average Day

Source: JNLR 2024-2 Audio Module
(Apr ’24 to Jun ’24 – 3 mth data) Base: All 15+



01	Live Radio
02	Music Streaming (Spotify & Other)
03	YouTube Music
04	Own Music
05	Podcast
06	Listen Back to Irish Radio

Average Time Among Format Listeners



01	Live Radio
02	Listen Back to Irish Radio
03	Music Streaming (Spotify & Other)
04	YouTube Music
05	Own Music
06	Irish Podcast
07	International Podcast

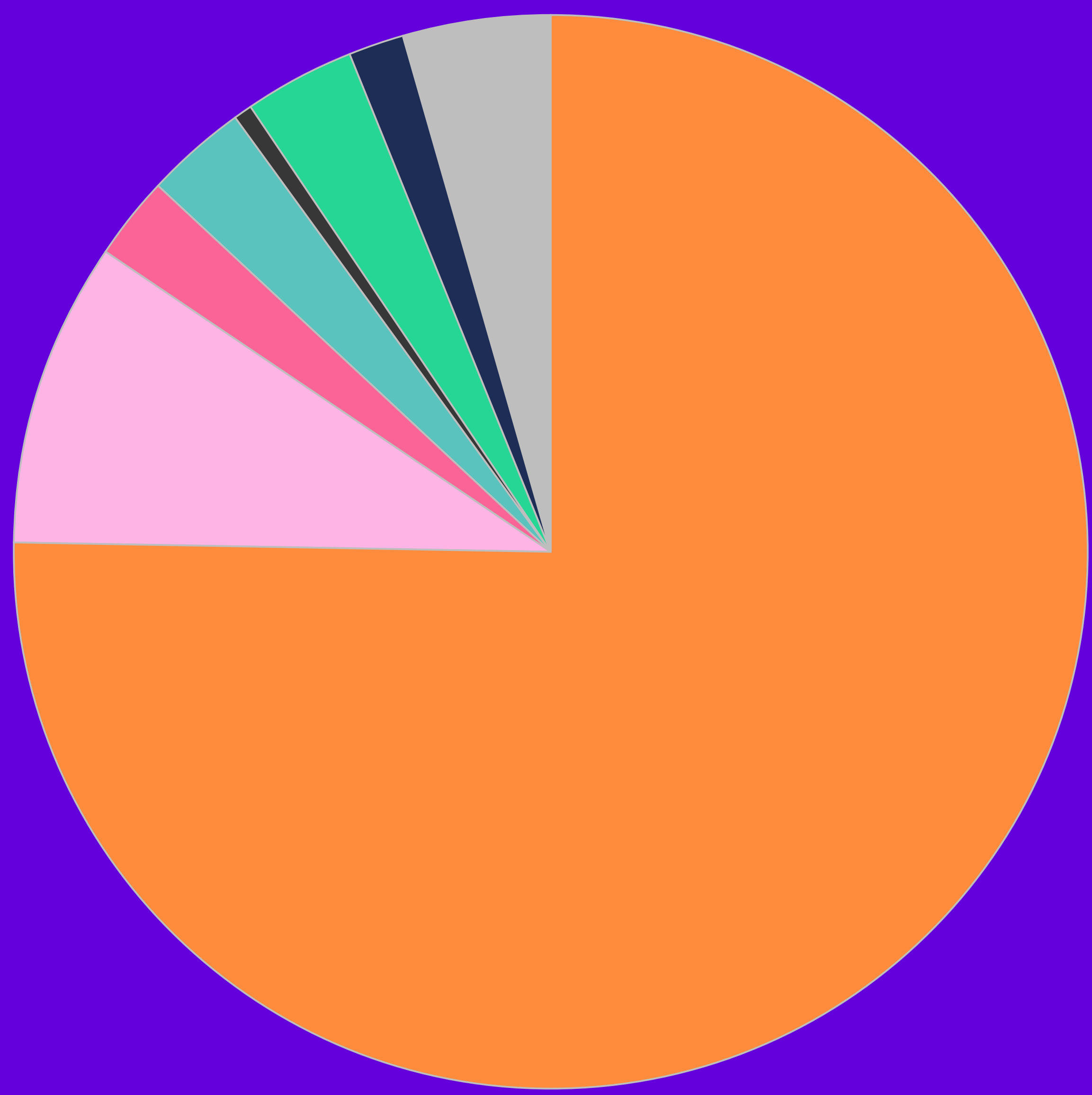
Source: JNLR 2024-2 Audio Module
(Apr '24 to Jun '24 – 3 mth data) Base: All 15+

The Audio Market Share of Time Spent Listening

This pattern of listening naturally impacts on share of time spent. Currently, among all respondents 15+, Live Radio has a share of 75.5% of time spent listening to audio. The chart on page 34 illustrates the relative share positions in 2024.

Among the younger 15-24 cohort live radio has a share of 46.2% of all audio listening minutes followed by audio streaming share at 31.2%. Over the years measured, podcasting share has increased across all age groups up to age 64. The chart on page 35 shows share of time spent by key demographics.

Share Of Time Spent



All 15+

Live Radio	75.5%
Music Streaming, Paid (Spotify & Other)	9.1%
Music Streaming, Free	2.6%
Own Music	3.0%
Listen Back to Irish Radio	0.5%
Podcast	3.4%
YouTube, Paid Premium	1.6%
YouTube, Free	4.3%

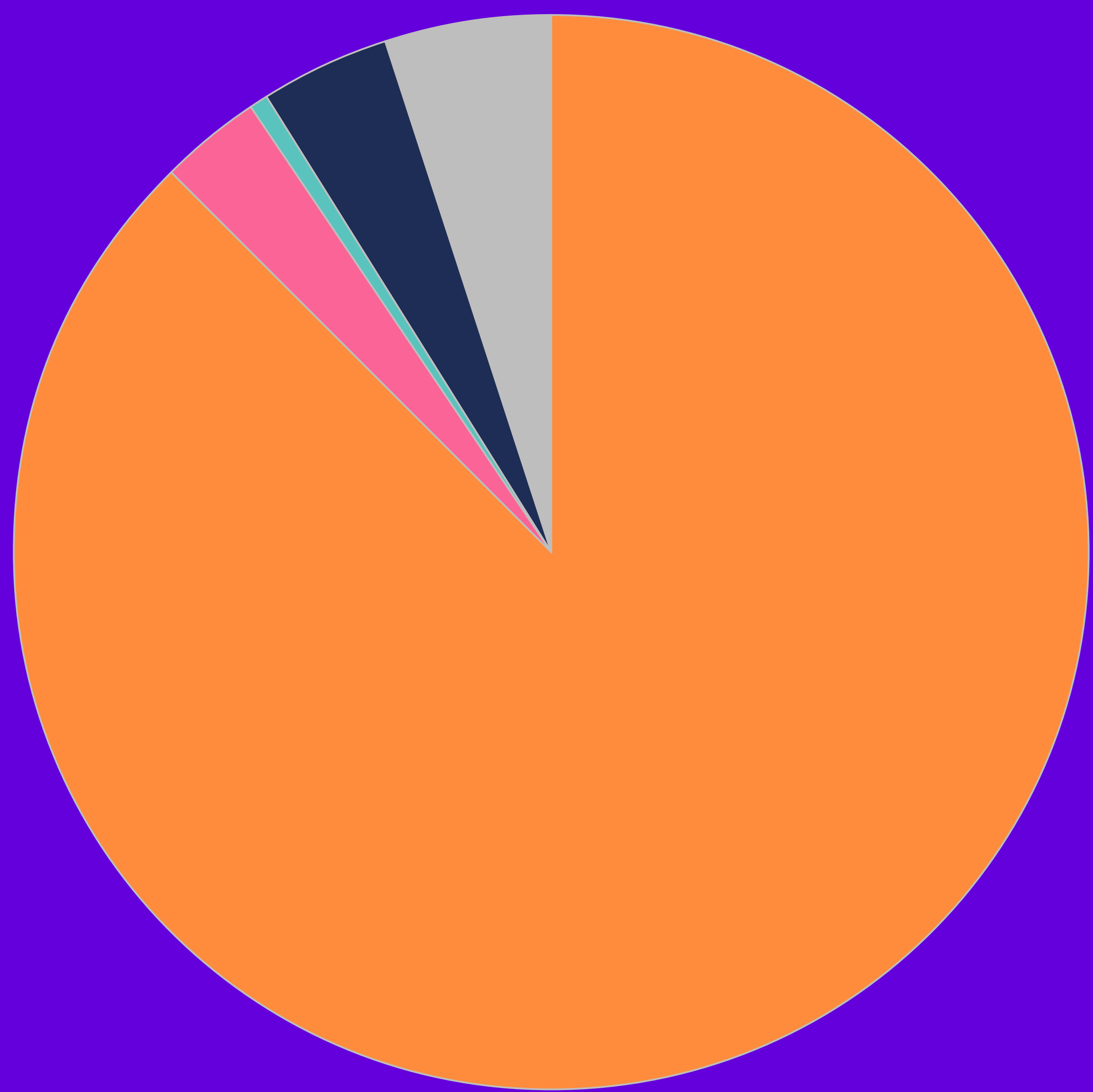
Source: JNLR 2024-2 Audio Module
(Apr '24 to Jun '24 – 3 mth data) Base: All 15+
*Assumes paid up subscribers to Streaming/
YouTube use premium services to listen

Audio Estimated Share of Time Spent, Average Day

Age Range	15+	15-24	25-44	45-64	65+
Live Radio	75.5	46.2	65.6	86.1	96.7
Listen Back to Irish Radio	0.5	0.3	1.0	0.4	0.1
Any Radio (Live or listen back)	76.0	46.6	66.6	86.6	96.8
Music Streaming (Spotify & Other)	11.8	31.3	16.3	4.5	0.9
YouTube Music	5.9	11.8	7.9	4.2	0.7
Own Music	3.0	7.2	3.3	2.0	1.1
Any Podcast	3.4	3.2	5.9	2.7	0.5
Irish Podcast	1.6	1.6	2.6	1.3	0.3
International Podcast	1.8	1.6	3.3	1.4	0.2
Percentage	%	%	%	%	%

Source: JNLR 2024-2 Audio Module
(Apr '24 to Jun '24 – 3 mth data) Base: All 15+

Share Of Commercial Audio



All 15+

Live Radio	87.5%
Music Streaming, Paid (Spotify & Other)	3.1%
Listen Back to Irish Radio	0.6%
Podcast	3.9%
YouTube Music	4.9%

Source: JNLR 2024-2 Audio Module
(Apr '24 to Jun '24 – 3 mth data) Base: All 15+
*Assumes paid up subscribers to Streaming/ YouTube use premium services to listen.

Share Of Commercial Audio

From a commercial perspective, not all audio is available for advertising. Earlier in the report we saw how a significant proportion of music streaming and YouTube listeners listen via paid subscription. And of course, we listen ad-free to music stored in our own archives. When we re-analyse the data to exclude these 'non-addressable' audiences, the share of time spent takes on another dimension. In this scenario, live radio share is 87.5% with on-demand, including music-streaming free and YouTube free, at 12.5%. This is almost unchanged since 2023 when live radio share registered as 87.8%. Among the younger 15-24 year olds, live radio achieves a share of 71.0% (-0.9% since 2023).

03

Our Audio Environment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1530 RADIO

Where we listen to Audio

In-home is the most common location for listening to audio. When probed for detail in relation to audio listening on the day prior to interview (yesterday), 71% of respondents say they listen at home. This is true across all age groups, but unsurprisingly, peaks among older individuals, particularly those aged 65 and older (84.2%). Interestingly, 72.2% of people who work from home (at least on one day) listen while at home (higher than the working population as a whole).

The most popular audio format in home is live radio - 55.6% listen to live radio while 16.6% listen to music streaming services, daily, at home. A small proportion, 6.5%, listen to podcasts at home.

In-car listening is the next most common location. More than two-in-five people (43%) listen in the car. Listening in car has increased steadily since 2021 (+9% points). In particular, there was a significant jump in listening between 2021 and 2022, no doubt reflecting the post-Covid environment. The table below shows location of listening trend.

Age Range	All 15+	15-24	25-44	45+
At home	71	69	66	75
Car/Van	43	38	50	40
Work/School/College	11	16	14	8
Out Walking/Cycling/Running	8	18	10	4
Bus/Train/Dart	2	7	3	*
Someone Else's Home	1	2	*	*
Percentage	%	%	%	%

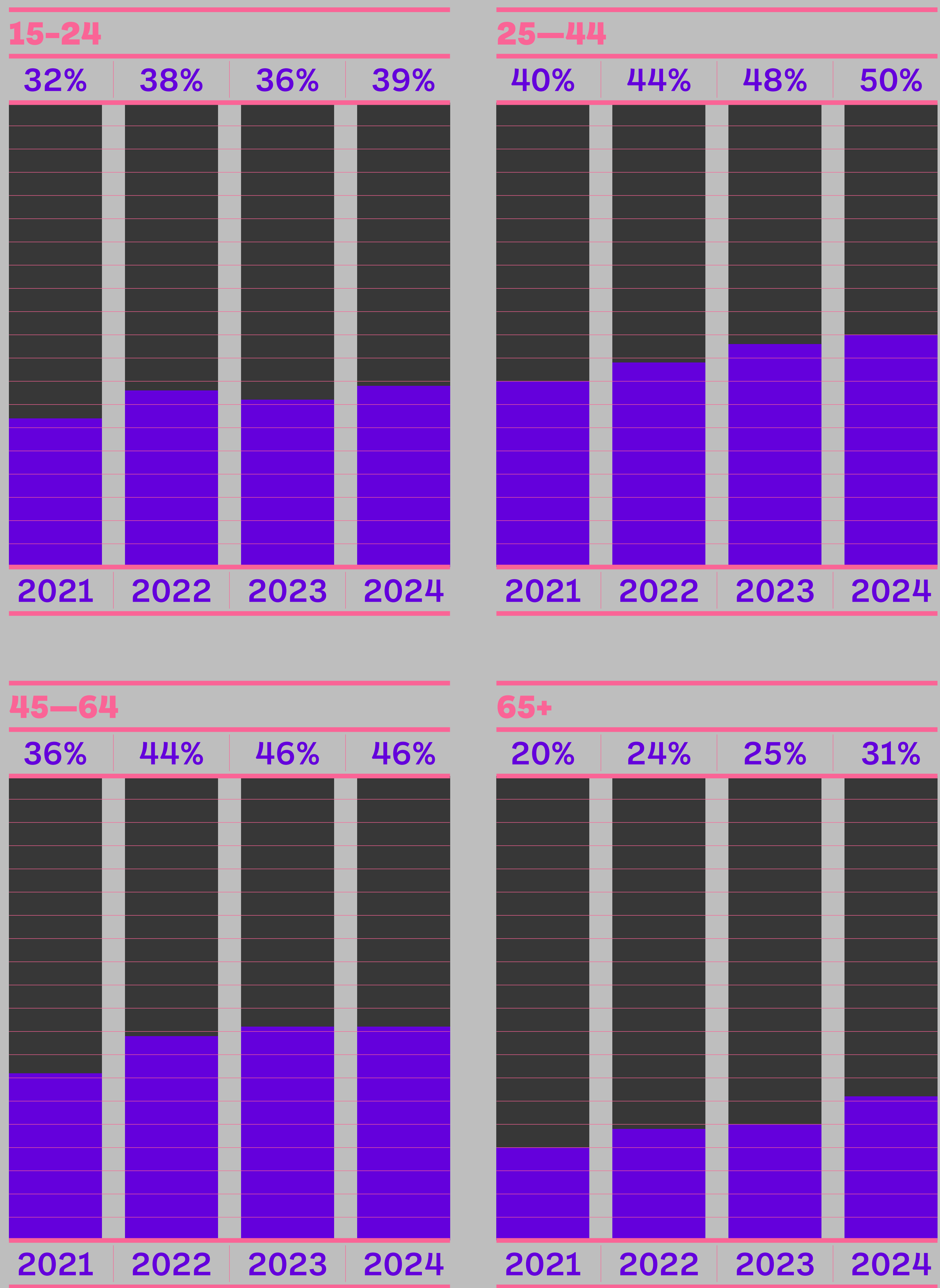
Source: JNLR 2024-2 Audio Module
(Apr '24 to Jun '24 – 3 mth data) Base: All 15+

Listening in car is more common among the 25-44 age demographic (49.7%) and among working cohorts (50.5%). Live radio is the preferred format for in-car listening, with almost 40% of the population saying they listen in-car daily. Only 5% listen to streaming services in the car. →

More than one-in-ten respondents (11.2%) consume audio content while in work, school or college, and this is most prominent among those aged 15-24 (16.0%). Again, live radio is the most listened to format in this location (8%) followed by music streaming (2.6%) and among those with a streaming subscription, (6.5%).

Listening on the go (out walking/cycling/running) – 8.3% has decreased by over 2% in the past year, returning to the position recorded in 2021. This behaviour is more prominent among the younger demographic (15-24), with 18.3% of this cohort reporting that they listen to audio while walking, cycling, or running. Music streaming is the more popular format when out and about among this demographic - 10.8% of this young cohort listen daily followed by 4.4% who listen to live radio in this environment. Listening to podcasts is least common, with less than 1% of young people engaging with them while out and about.

Audio Listening in Car Trend

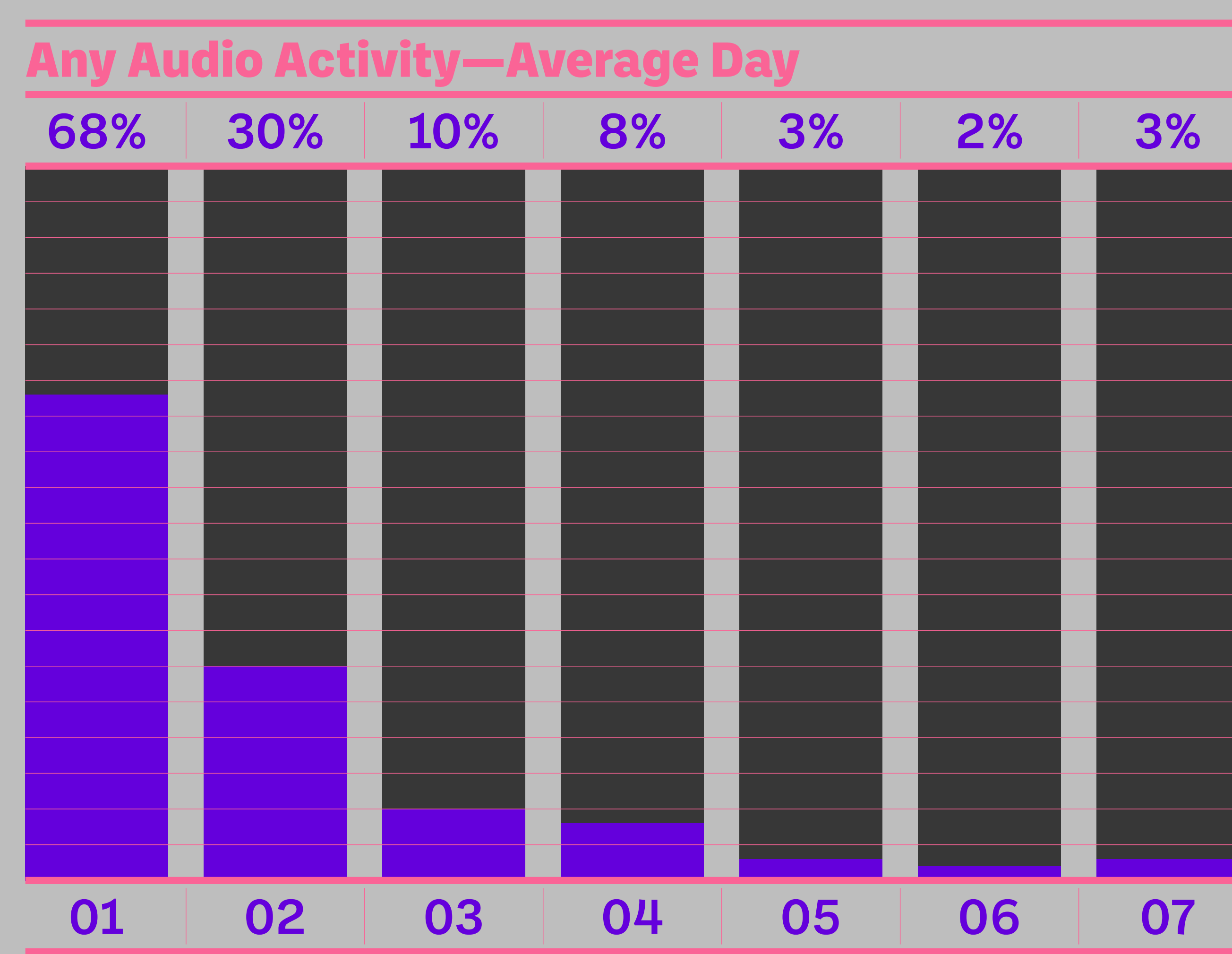


Source: JNLR 2024-2 Audio Module
(Apr '24 to Jun '24 – 3 mth data) Base: All 15+

How We Listen to Audio

Our world is becoming increasingly digital but despite this, the more traditional audio consumption devices remain popular. More than two-thirds (67.7%) listen to audio via a Radio/music system daily (including CD player or turntable). Despite this relatively heavy use, this represents a decrease of 2.6% points since 2023. While the device is more popular among older groups, almost half of the younger demographic (15-24) also listen to audio via the traditional music system.

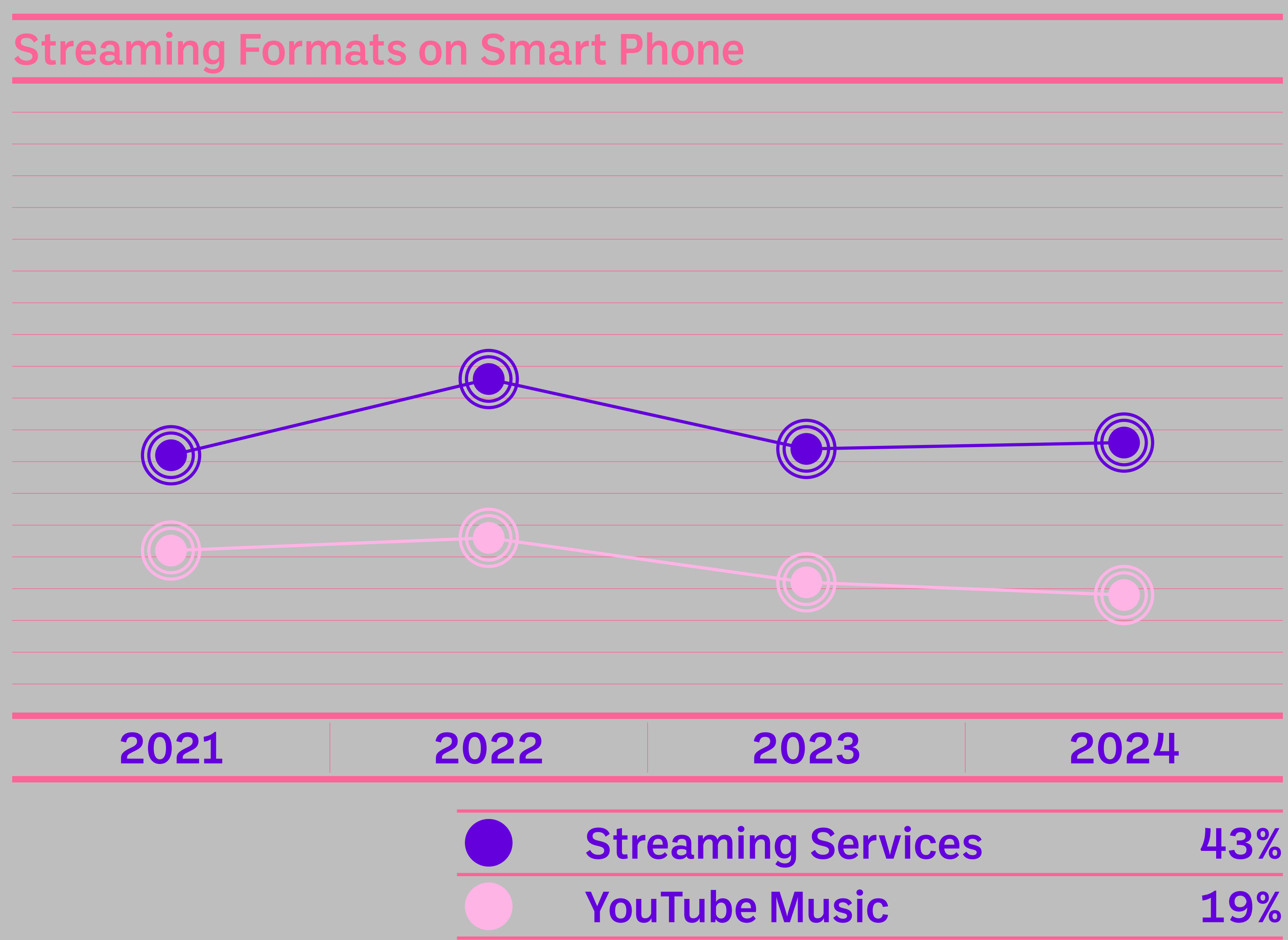
Significant proportions use a connected device, but the radio is still the most used device to listen.



01	Used Radio/Music System
02	Used Smartphone
03	Used Smart Speaker
04	Used PC/Laptop
05	Used Tablet
06	Used TV
07	Used Other System

Listening to audio via a mobile/smart phone has plateaued this year (29.5%). When listening on a mobile device, 17.8% are using music streaming services to stream audio on demand. The younger demographic (15-24) in particular avail of streaming services on their mobile devices, with 43.1% saying they listen daily.

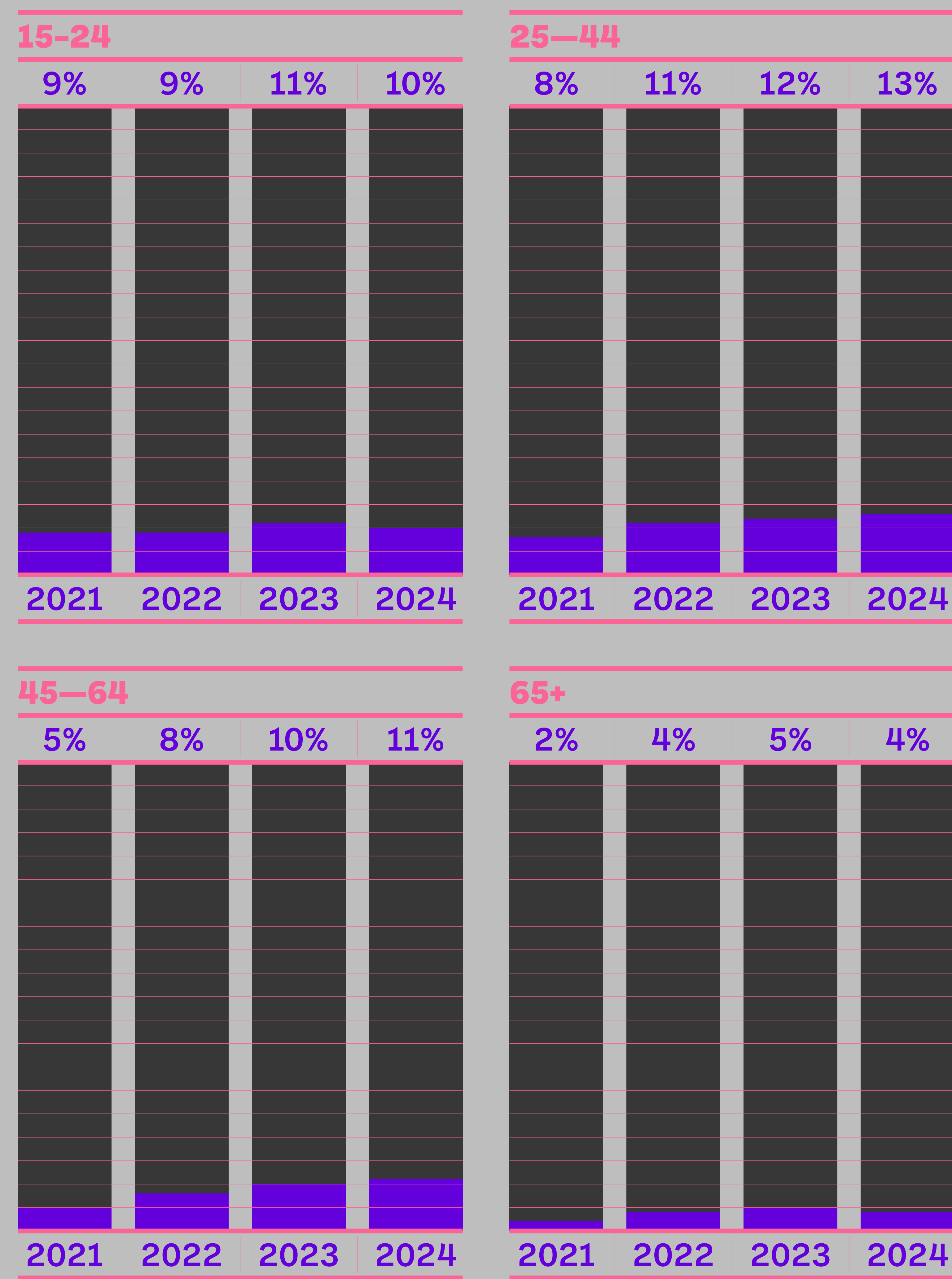
A similar trend can be seen with YouTube music on mobile devices – it peaked among the 15-24 age group in 2022 and has dropped 9% points to 19.2% in 2024. The chart below shows listening patterns among 15-24 year olds.



Source: JNLR 2024-2 Audio Module
(Apr '24 to Jun '24 – 3 mth data) Base: All 15+

Audio Listening On Smart Speaker

The Smart Speaker such as Alexa is the one device that continues to show growth in terms of audio consumption, albeit only marginally in the last year. Among those who own a smart speaker, 22.3% use the device to listen each day.



Source: JNLR 2024-2 Audio Module
(Apr '24 to Jun '24 – 3 mth data) Base: All 15+

JNLR Survey

The JNLR survey measures radio listening activity among the general public, aged 15+, in the Republic of Ireland. The survey is a continuous one, with interviews conducted across the twelve months of the year among a sample of c16,800 respondents Since 2017, each year in Quarter 2 (April, May and June) an additional module is included alongside the core questionnaire, which addresses activity on the broader audio market.

In this module, questions address engagement in the various audio formats including live radio, audio streaming, listen back, podcasting, YouTube music and personal music archives (referred to in this report as 'own music').

Notes on the Report

This report is sourced from JNLR data collected in Quarter 2 2024 (April to June 2024).

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 9-12 is based on the core interview (question 3 to 5) and key analyses presented in August 2024, based on 12-month data, (July 2023 to June 2024).

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 2024. (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.

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