

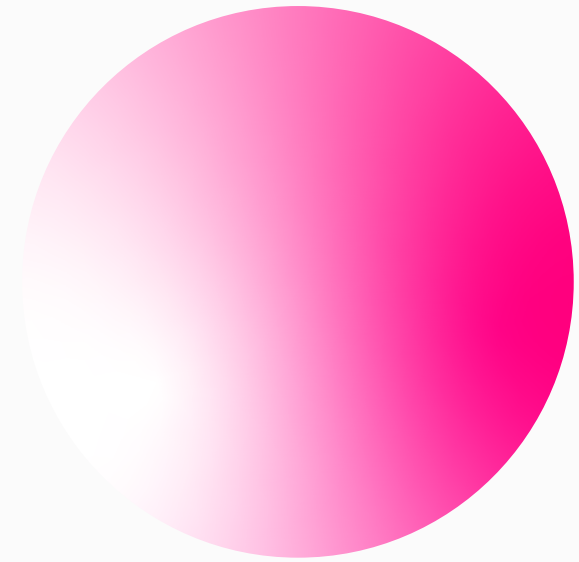
DIGITAL AUDIO'S EDGE

Exploring the Power
Digital Audio

Bauer Media & CORE Research

core™ Research

Research Context



The ability to deliver reach from the more traditional media channels is declining. For example, 100 TVRs now delivers 23% less reach each week since 2015 and is continuing to decline. At the same time, the number of ads we see is increasing. On average, 4% increase in ad exposure each year. If this trend continues by 2026 it will be 3,535 ads every week.

There is a need to use more channels than in the past and find properties that deliver high levels of reach and attention.

RADIO LISTENERSHIP IS ON THE RISE:

The latest Joint National Listenership Report (JNLR) reports that 90% of adults in Ireland and 86% of 15–35-year-olds are listening to radio every week.

Daily listenership levels have also strengthened, growing by 69,000 listeners. Looking at digital audio, 8 in 10 adults (18+) in Ireland listen to Digital Audio in an average week. Bauer Media Audio Ireland is the country's largest commercial radio group with a portfolio of national, regional and local stations. They now have a weekly audience of 2.3 million listeners. They also operate Off The Ball, the aggregated listening platform GoLoud for radio, podcasts and music,

audioXi, Ireland's largest digital audio advertising exchange and Media Central.

THE AIM:

Bauer Media Audio want to lift Digital Audio, proving its worth compared to other prominent media channels.

THE RESEARCH NEED:

We wanted to conduct a study to compare performance of Digital Audio vs. Connect TV and vs. Social Media.

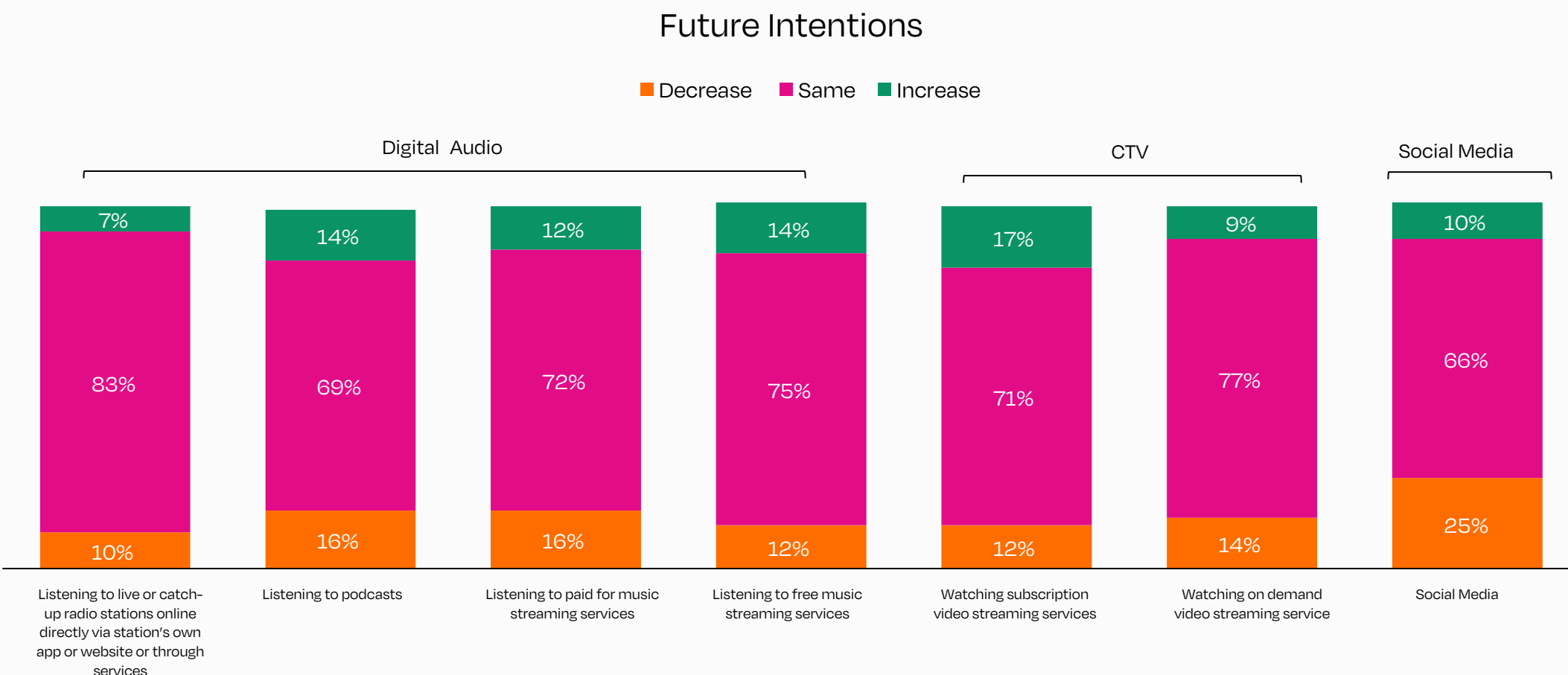
Digital Audio Overall



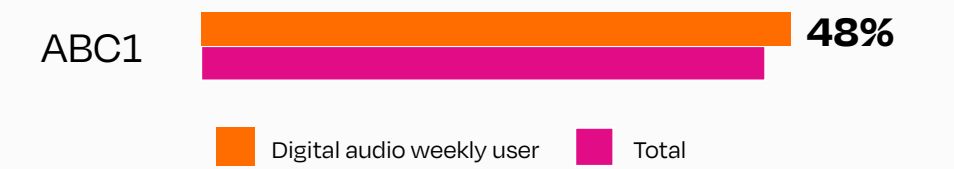
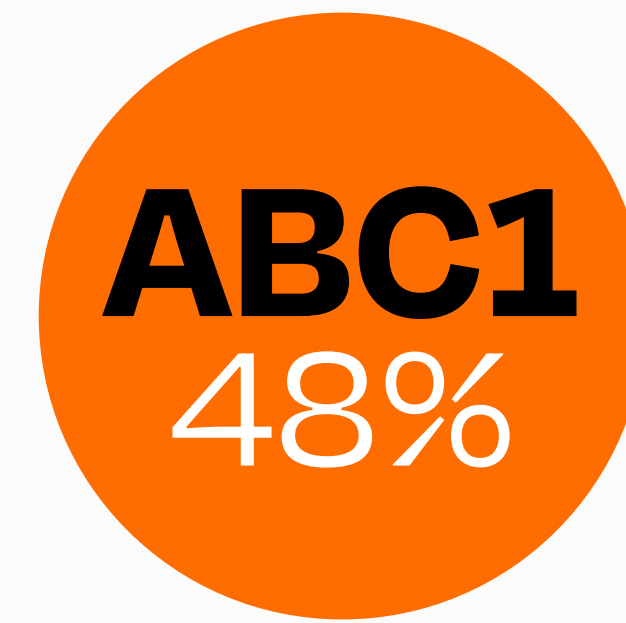
On average people spend over 13 hours per week consuming Digital Audio

Future is bright

Whilst having the highest number of hours consumed in comparison to CTV and Social, 1 in 10 people plan to increase their time spent with digital audio in the next 12 months

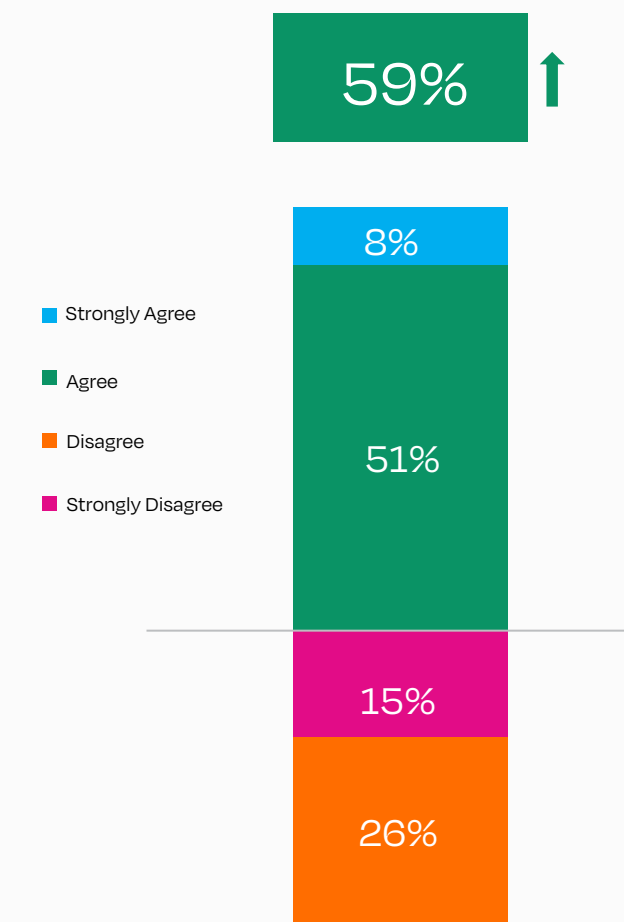


Digital Audio over indexes for ABC1's when compared to CTV and Social Media



Engagement with Advertisements

3 in 5 people say they're willing to consume digital audio ads in return for great content – this is significantly higher than CTV or Social

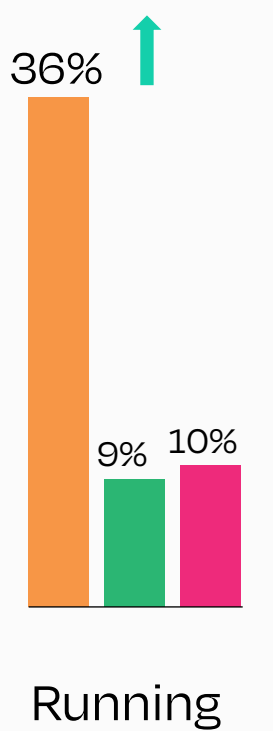


I listen to advertising when listening to online radio, music or podcasts, in return for great content



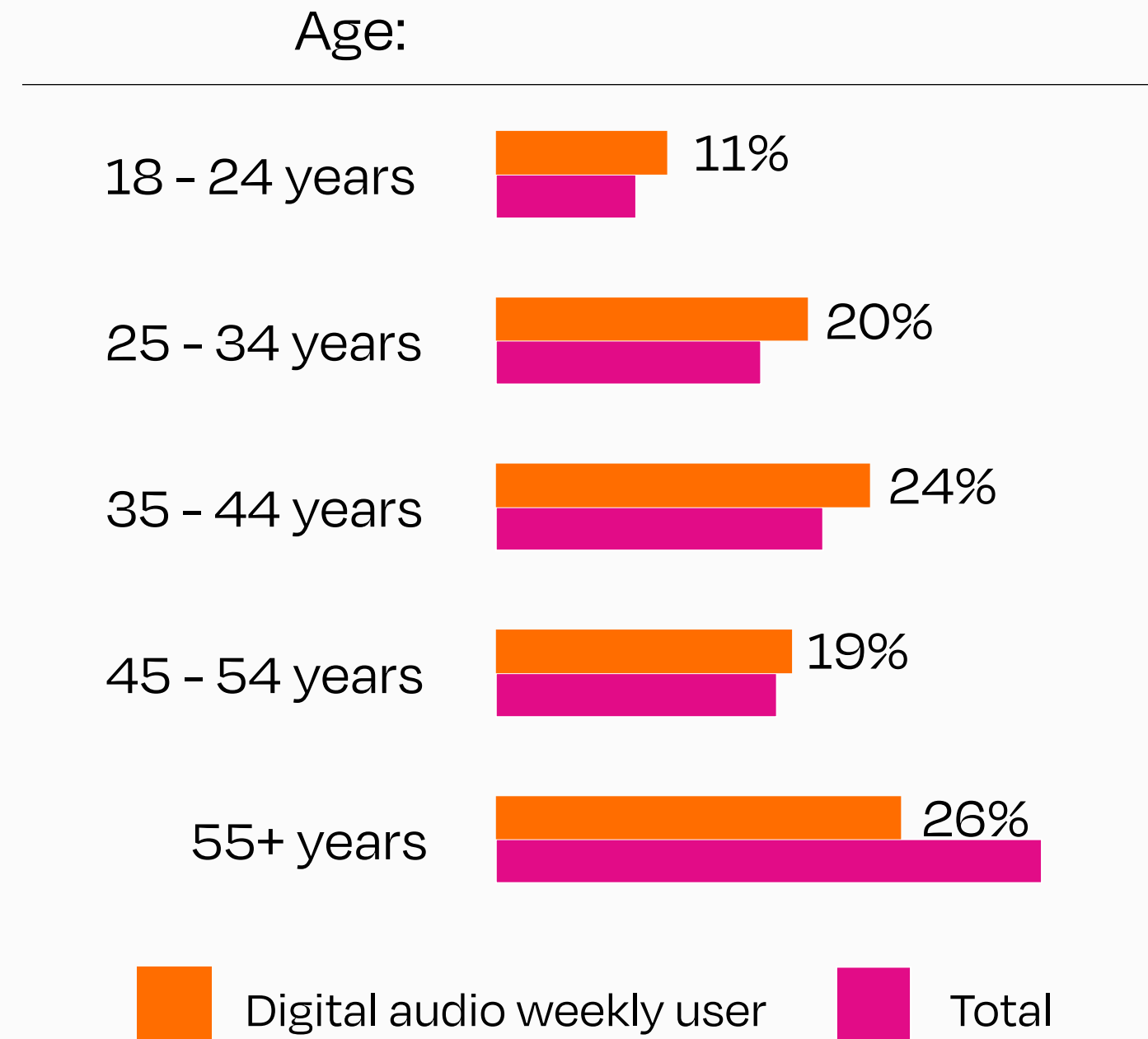
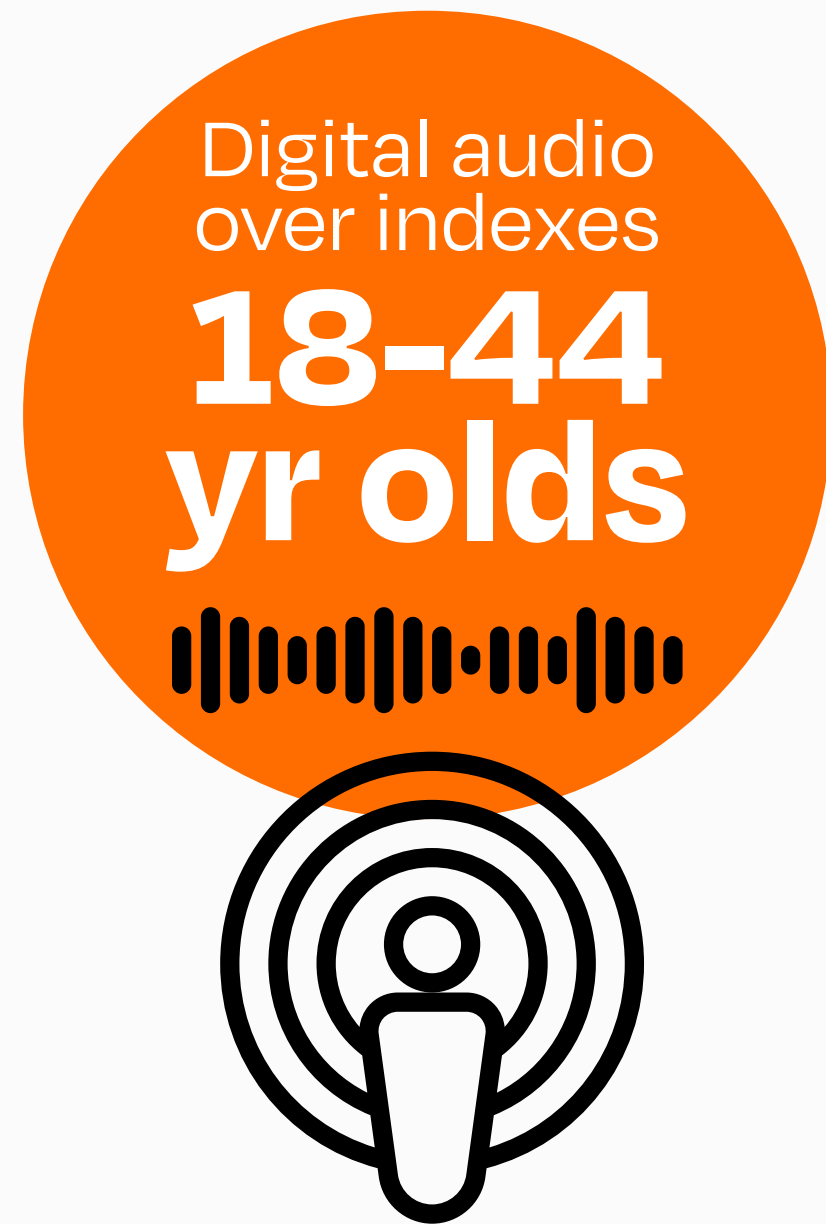
Fitness Fanatics

while out running people are over 3 times more likely to consume digital audio than either connected TV or Social Media



Digital Audio Overall

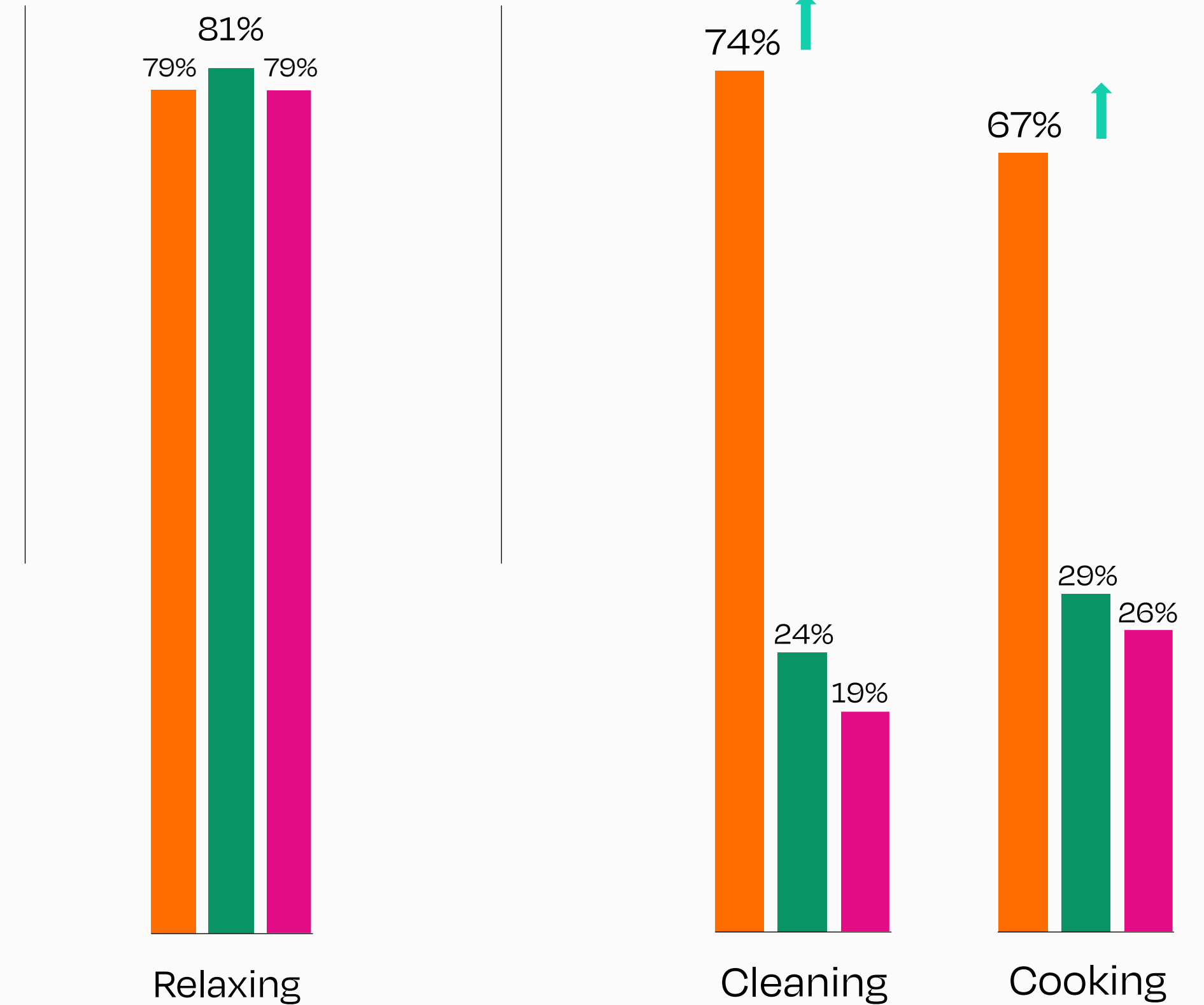
Digital Audio over indexes for 18-44 y/old's when compared to CTV and Social Media



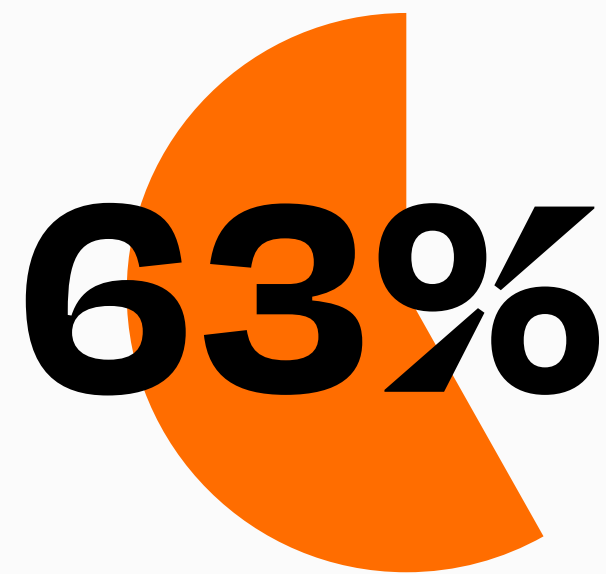
Integration into daily life

Over 79% of people listen to digital audio when relaxing.

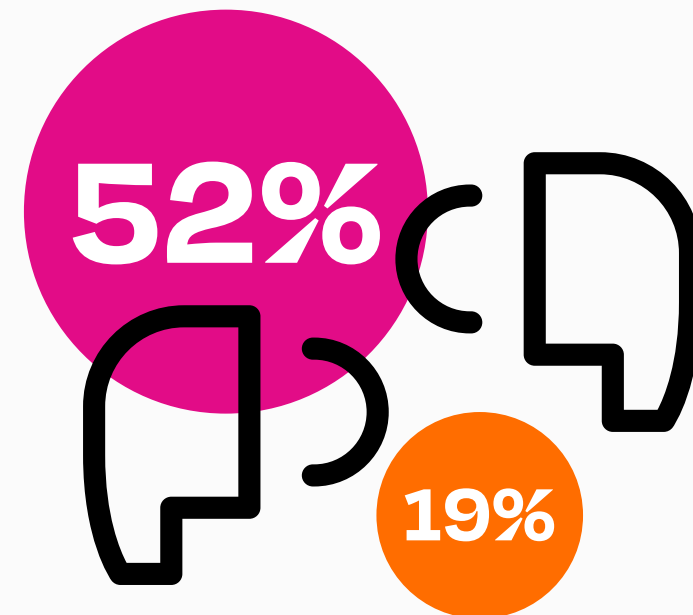
Cooking, Cleaning & Connecting when we're cleaning (+50% avg) or cooking (+38% avg) our waythrough a busy week, digital audio is the companion of choice at over CTV or Social.



Digital Audio vs Social Media



In an average week, Adults are spending **63% more time (5 hours more)** consuming digital audio than social media.



People feel that digital audio is **33% more authentic** than the content they consume on social media.



A better night time companion
19% more people feel consuming digital audio helps them sleep better than consuming social media.

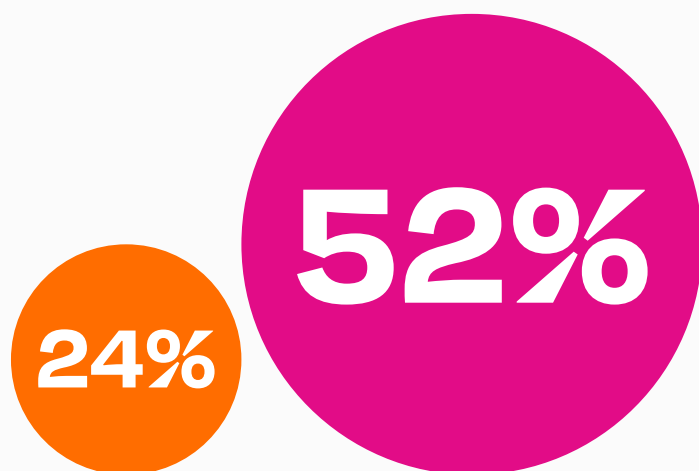
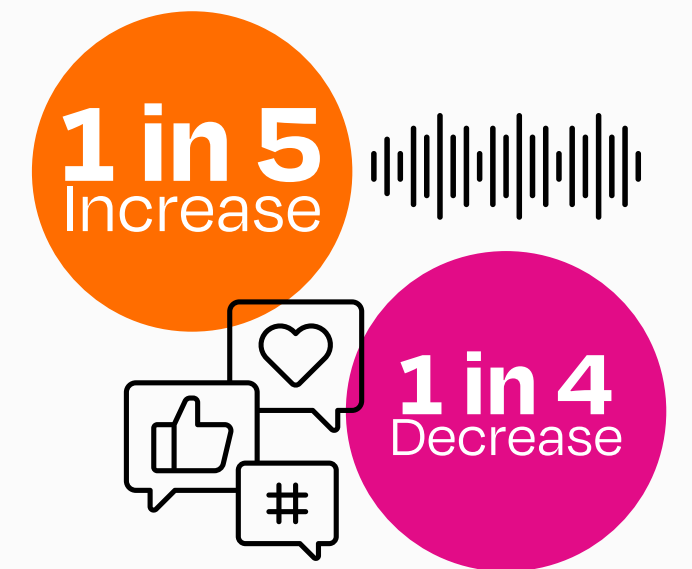
When we look at the frame of mind while people are consuming media, digital audio users are **11% more likely to have positive feelings** in comparison to Social Media.



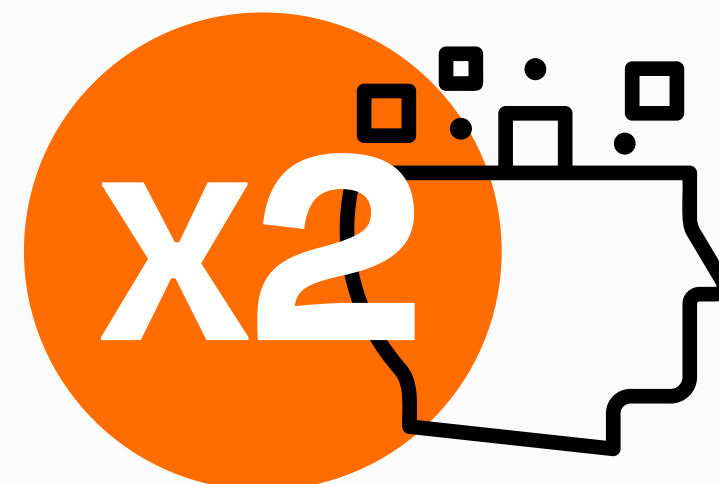
Mental Stimulation
People feel digital audio is over 25% more mentally stimulating than social media.



Future habits of weekly users
1 in 5 people who use digital audio weekly, feel they'll increase the time they spend in digital audio, while 1 in 4 people intend to scale back the time they spend with social media.



Digital Audio users are 2 times more likely to say listening to **Digital Audio is a good way to spend their time** compared to social media.



Focus Forgone
People are twice as likely to not be focused at all on Social Media as they are on digital audio.

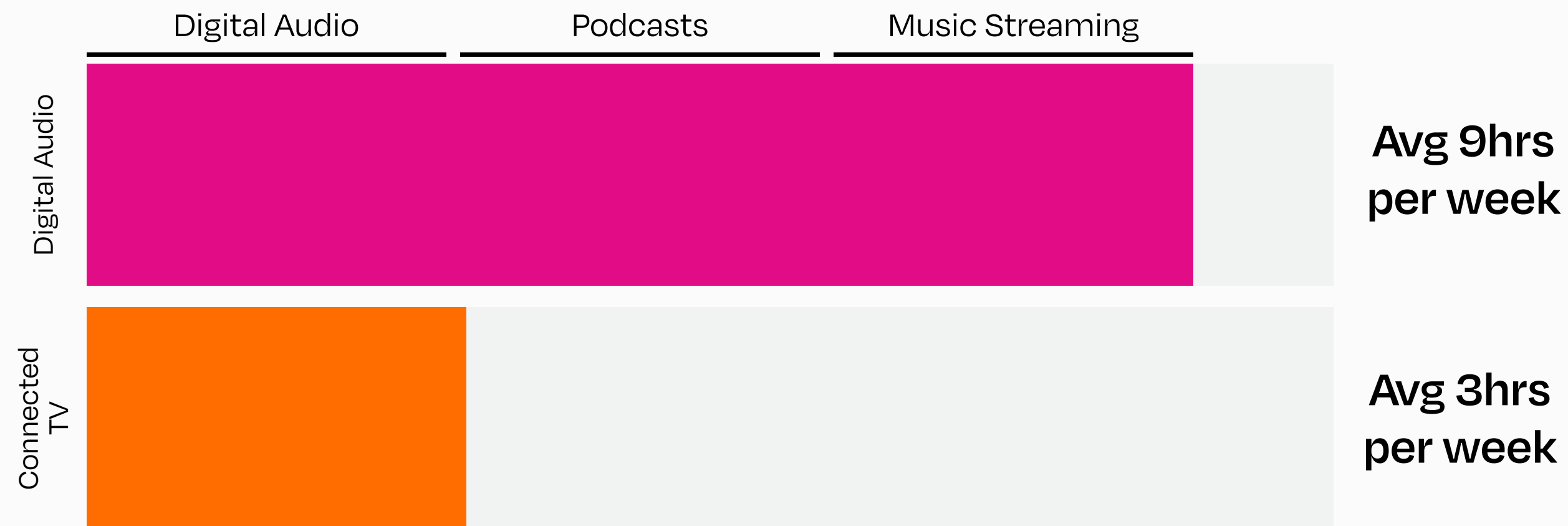


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Digital Audio vs Connected TV

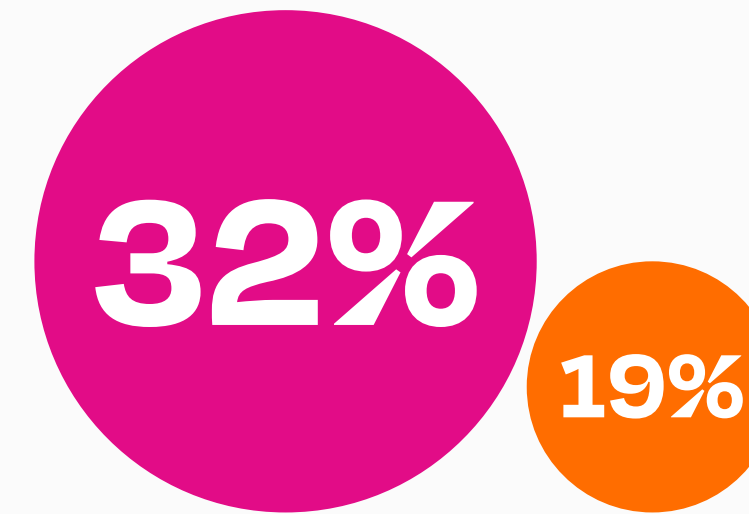
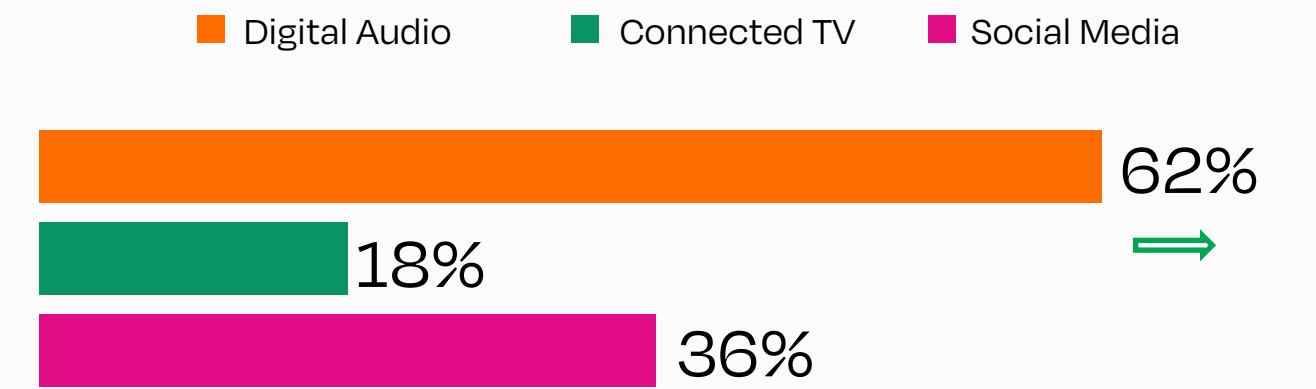
Ad Supported Hours

When we look at advertising accessible media (excluding subscription services without advertisements) - In an average week adults are spending **6 hours more time consuming advertiser accessible digital audio than advertiser accessible Connected TV**



Commuting Contrast
people are over 3 times more likely to consume digital audio when they're commuting than connected TV

Integration into daily life



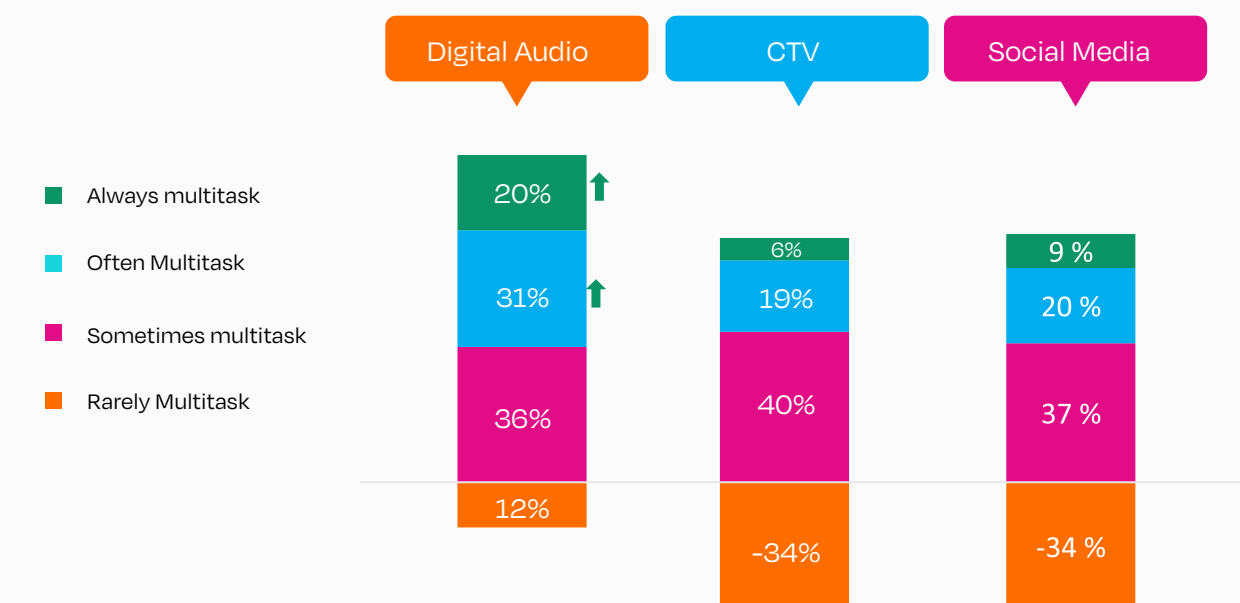
Feeling of connection to content.

Connection with Content

When people consume digital audio, they feel substantially more connected to the content – then with connected TV, with digital audio having more than a 13% higher feeling of connection

Everyday integration
people are twice as more likely to consume digital audio when multitasking, meaning it is the perfect companion for people's daily lives.

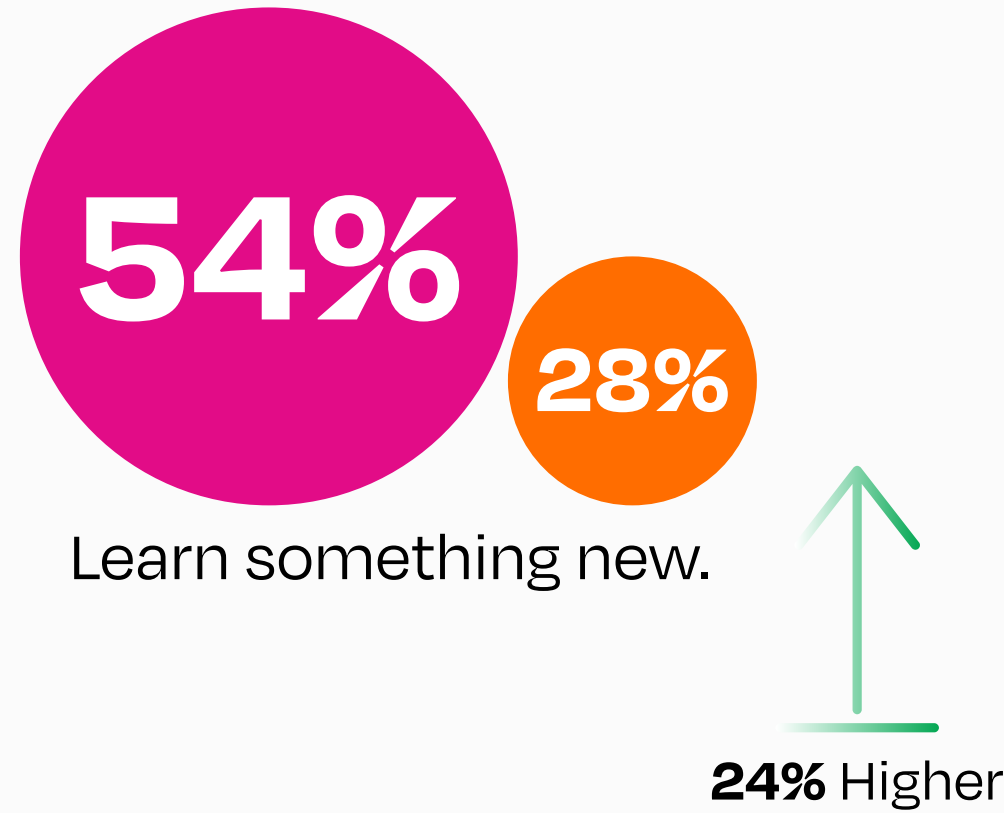
Multitasking while consuming Digital Audio / CTV / Social Media



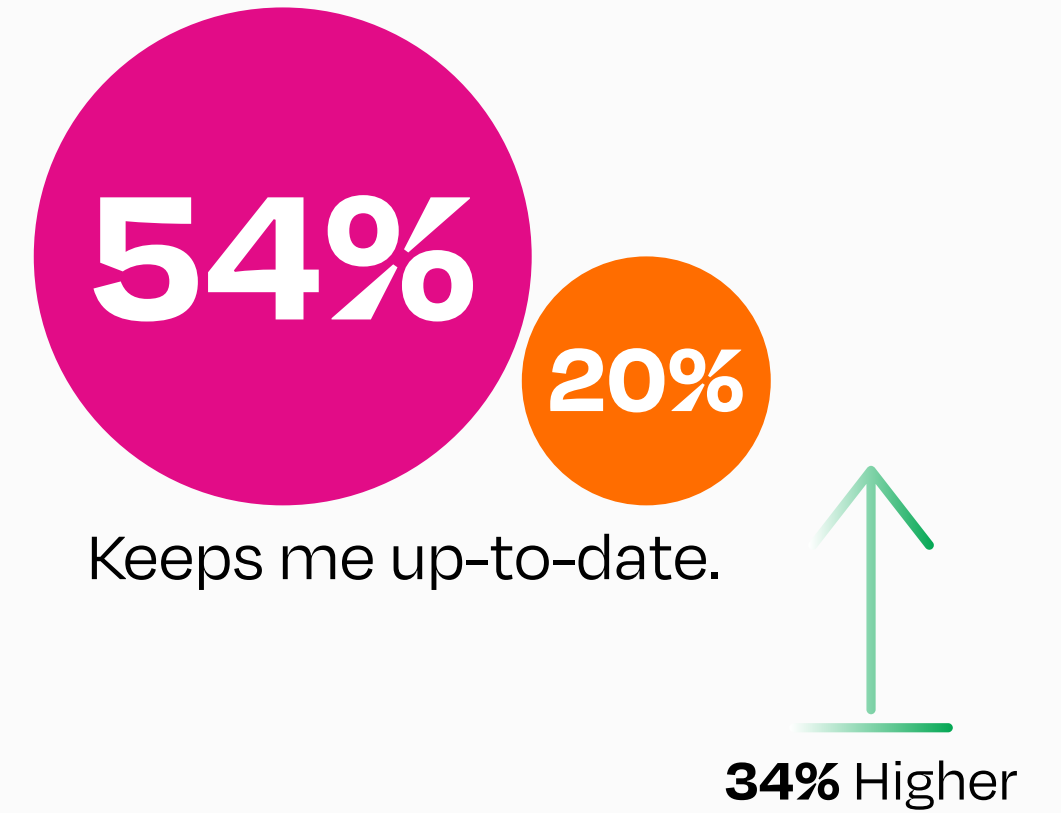
Digital Audio vs Connected TV



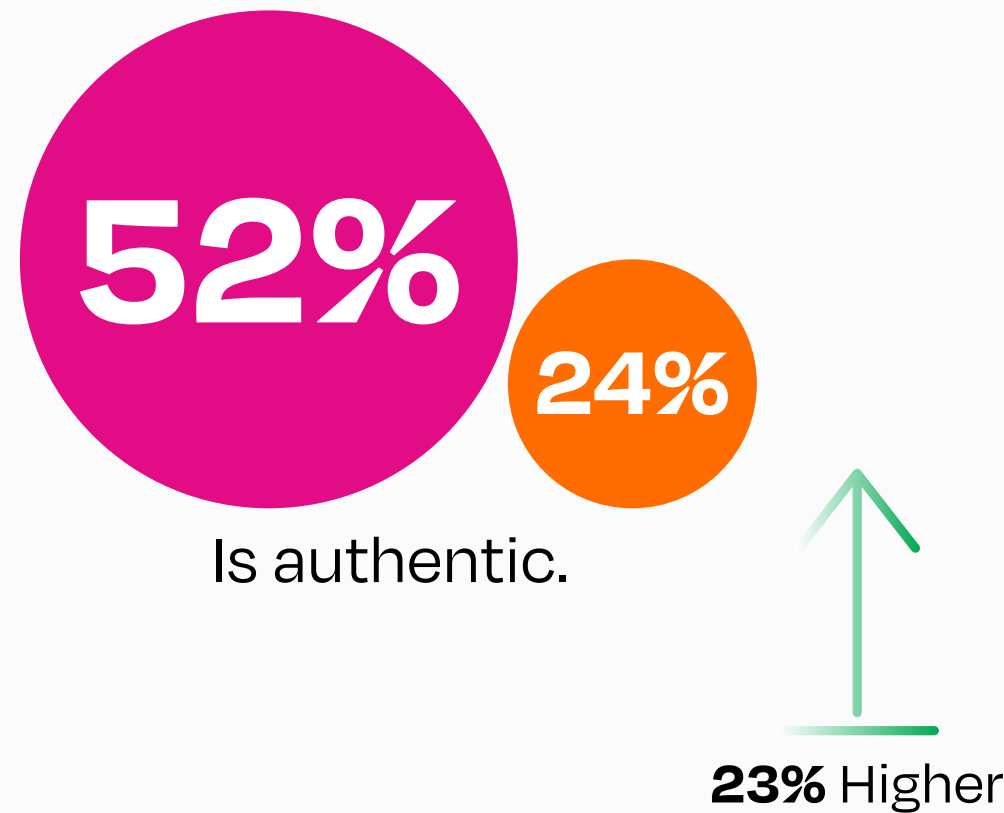
Learning
Digital audio users are 2x more likely to say they learned something new listening to Digital Audio compared to CTV 54% vs. 28%.



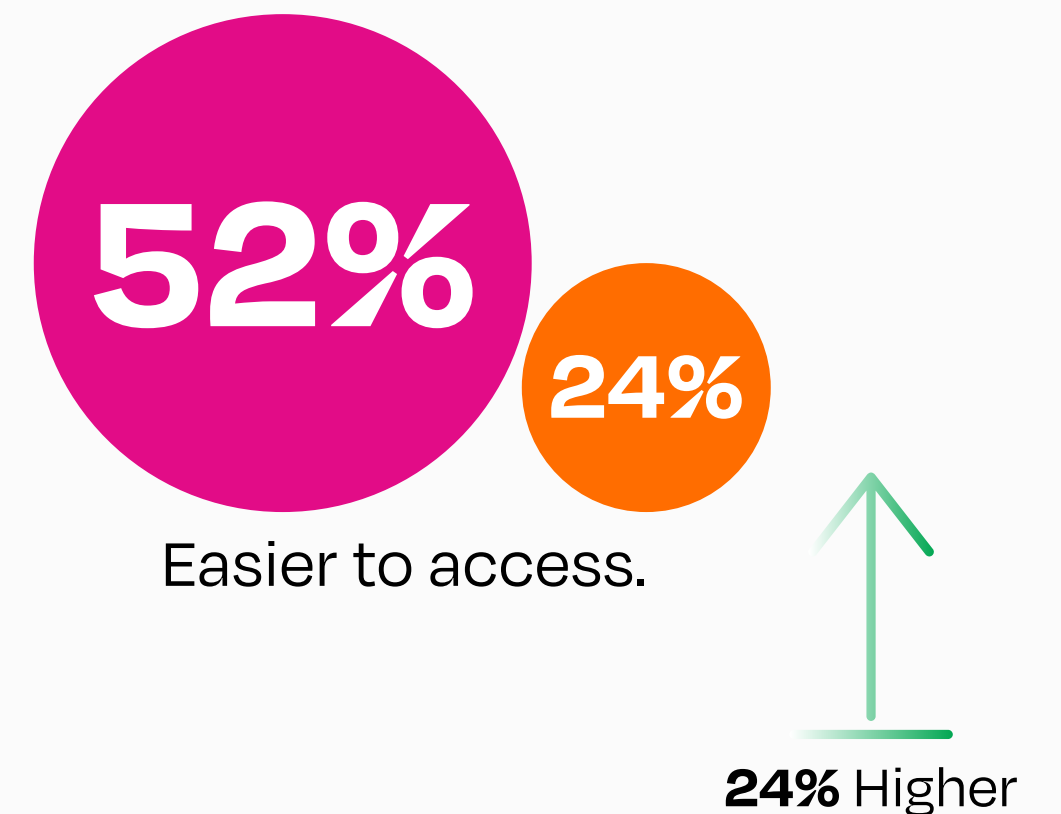
Keeping you Up to Date
Nearly 2.7x more people feel up to date, when they consume digital audio content in comparison to connected TV 54% vs 20%.



Always on Authenticity
Digital audio scores 23% higher in comparison to CTV, when we asked people how authentic they felt the content was.



Content that moves with you
People feel they can take their digital audio content with them and it's easier accessed than CTV, by over 24% which is to be expected given the nature of audio content.



Key Takeaways

Engaged & Loyal Audience

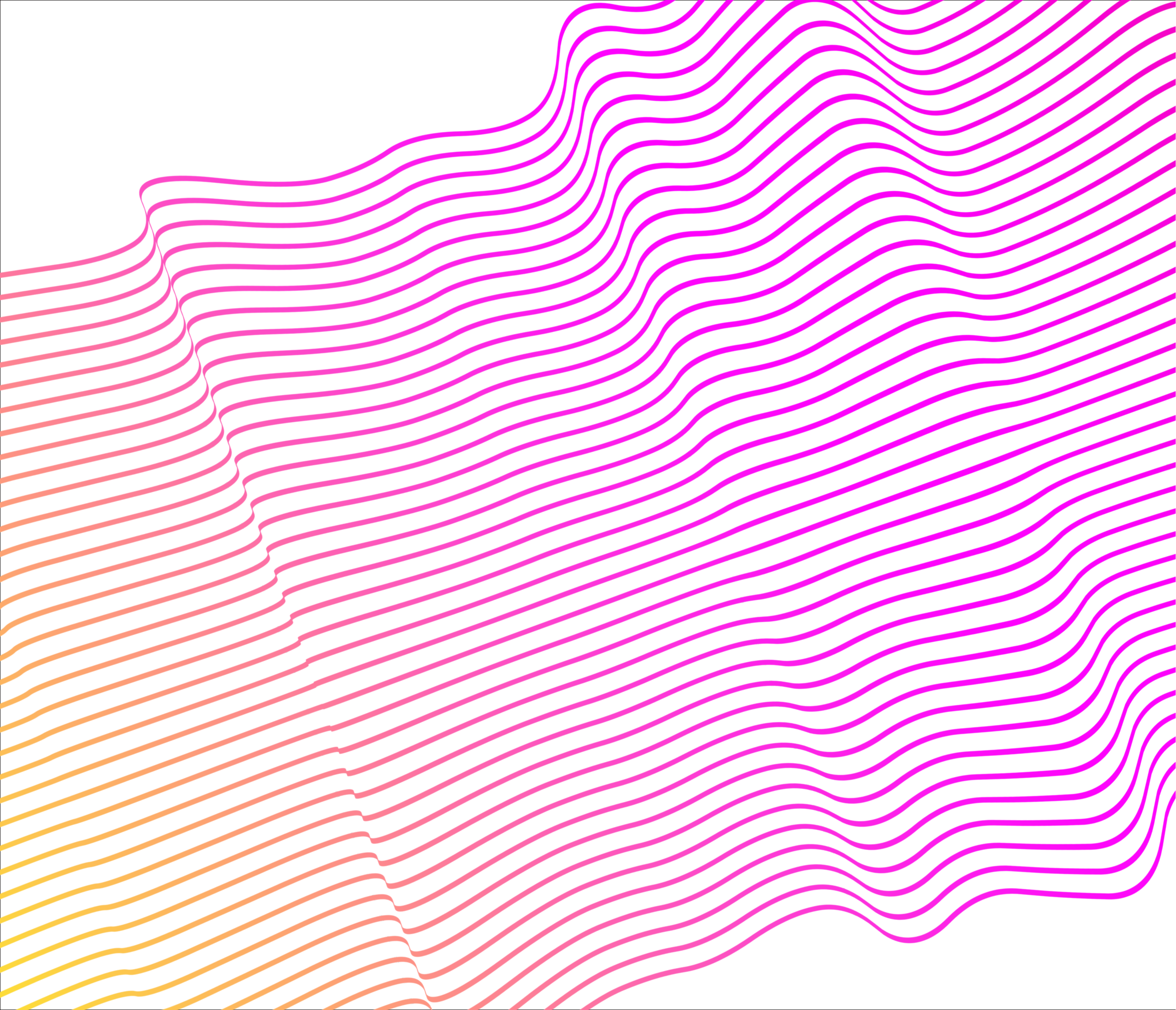
Adults in Ireland spend more time consuming digital audio than they do connected TV or social media.

Seamless Integration

Digital audio's flexibility and connection allows it to integrate with many aspects of our daily lives. Providing advertisers with more touchpoints.

High Trust

Digital Audio leads in terms of trust, authenticity and acceptance for ad consumption, compared to social media and CTV.



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In partnership with
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