

# THE LATEST RADIO SURVEY

## A 5-MINUTE READ TO BRING YOU UP TO SPEED



### OVERALL LISTENING TRENDS

The Irish public's love affair with radio has always been a long and faithful one and the latest results prove that our inherently aural culture persists with 83% listening everyday (down 1% YOY).

These figures are from the latest JNLR report release covering Jul 15 – Jun 16 period. All data is compared to previous 12 month period, Jul 14 – Jun 15.

The amount of time spent listening is marginally down 0.5% YOY at 4.13 hours daily (All Adults). Whilst listening for 35+ has been flat, the younger demographics have shown a decrease. Traditional radio has done well to maintain, and even grow, youth audience listenership in recent years given the acceleration of technology and emergence of new platforms. The latest listenership figures are somewhat surprising as the largest decrease in time spent listening was not among 15-19's (flat YOY) but among 20-24's (-2.9%) and more surprisingly 25-34's, which went down 4%.

While this is not cause for immediate alarm, any valuable audience segment that decreases 4% is a concern. This may demonstrate that new platforms are growing in prominence (such as Spotify and Apple music) at the expense of traditional radio, or it may be an early sign that challenges the belief that as younger audiences grow up they naturally embrace legacy media. Radio broadcasters are quickly evolving into multi-channel propositions to combat the loss of linear listenership.

### NATIONAL

RTE Radio 1 are the undoubted 'winners' as the perpetual narrative in radio land continues around prize fighting gaining a further 13,000 listeners and 1.7% market share (7am-7pm) out-performing all their national counterparts. Lyric has also increased in listeners (+ 9,000), coupled with an increase to their market share, now at 2.1%. This book doesn't make for pretty reading for the youth offering in the family - 2fm. The station seemed to be experiencing a mini-resurgence recently, but the latest book saw a loss of 58,000 listeners since June 2015.

Today FM have experienced significant losses also (-47,000). Newstalk, whilst somewhat satisfied with book on book performance, will be disappointed with the annual picture showing a loss of share (-0.3%) and dropping 21,000 listeners. The new schedule on the horizons brings with it promise, but they would have hoped to be working off a more solid listener base.

Station	Weekday Reach 2015	Weekday Reach 2016	Diff in 000's	7am-7pm share 2015	7am-7pm share 2016
RTE Radio 1	24.00%	24.00%	13	21.90%	23.60%
2FM	11.00%	10.00%	-58	7.10%	6.00%
RTE Lyric FM	4.00%	4.00%	9	1.90%	2.10%
Today FM	13.00%	11.00%	-47	7.90%	7.70%
Newstalk	11.00%	11.00%	-21	6.60%	6.30%

### KEY SHOWS

Morning Ireland remains the most listened to radio programme in the country, and have reinforced that status by growing listenership by 16,000 YOY. The old radio adage of "win the morning and you win the rest of the day" has held true as that breakfast gain carried through the schedule with Sean O'Rourke up 9,000 and Liveline up 22,000 listeners.

2FM are undoubtedly struggling with the loss of Ryan Tubridy, whom has left a dip in the schedule that has continued on to negatively impact subsequent shows. A loss of 1.1% market share from 7am – 7pm will have station bosses scratching their heads as to how to progress and fill the void Tubridy's departure has left. Breakfast is down 11,000 book on book, but given the change in time slots, it's difficult to get a comparable picture looking at the two periods.

Today FM maintain a strong appeal, however listeners are shedding across the schedule (7am to 7pm), with only Fergal D'Arcy remaining stable from 14:30 to 4pm. The biggest concern will be Anton Savage's slot, taken from the departed Ray D'Arcy, having lost 20,000 listeners versus the previous year.

Pat Kenny held his stable listener base year on year with 131,000 tuning into his show. Shows such as Breakfast with Ivan Yates and Chris O Donoghue (-10,000) and The Right Hook (-11,000) have been enjoyed growth in recent years so their decline will come as a surprise. Some of this may be attributed to the surrounding speculation of the pending retirement of George Hook and the confirmation of Ivan Yates leaving potentially causing unrest among listeners they will hope with re-recruit with an all-new schedule.

### DUBLIN

Q102 had a disappointing book losing 11,000 listeners in the last year. TXFM showed potential signs as to why they are winding down, losing further listeners before the closure in October. Spin 1038 also will look worrying at YOY figures, showing not just a decrease in daily reach, but losing a share point in the 7am-7pm period (now standing at 6.10%). The big winners were 98fm with a gain of 10,000 listeners increasing their daily reach and share figures to 11% and 6.9%. FM104 strengthened their dominance increasing their share (up to 11.4% now), despite not recruiting any additional

Station	Weekday Reach 2015	Weekday Reach 2016	Diff in 000's	7am-7pm share 2015	7am-7pm share 2016
FM104	18%	18%	0	11.10%	11.40%
98FM	10%	11%	10	6.40%	6.90%
Q102	9%	7%	-11	5.20%	5.90%
SPIN 1038	15%	13%	-9	7.10%	6.10%
TXFM	2%	2%	-6	1.00%	0.70%
SUNSHINE 106.8	5%	5%	2	4.00%	5.20%
Classic Hits	3%	3%	-3	2.60%	2.30%
Nova	5%	5%	1	3.50%	3.70%

### MAIN CITIES

Limerick Live will grab the biggest headlines with a 10% gain in their daily reach by recruiting 16,000 listeners versus the same period last year. Red FM have much to celebrate winning the Cork battle for ears despite shedding 1000 more listeners than Cork 96fm, presenting a race that is likely to be neck and neck to win that coveted top spot. Galway Bay increased their dominant position with a further 7,000 listeners with daily reach and share to match.

Station	Weekday Reach 2015	Weekday Reach 2016	Diff in 000's	7am-7pm share 2015	7am-7pm share 2016
Cork- Cork 96fm	28%	27%	-4	20.60%	19.10%
Cork- C103FM	15%	17%	6	14.00%	14.40%
Cork - Red FM	30%	28%	-5	20.60%	19.50%
Galway - GBFM	34%	38%	7	29.50%	30.20%
Limerick - 95FM	37%	47%	16	29.10%	35.60%
Waterford - WLR	42%	44%	2	38.60%	38.30%

Source: all data from JNLR // IPSOS / MRBI July 14 – June 15 v July 15 – June 16.