

JNLR Report July 2009 – June 2010

July, 2010

Summary (year on year comparisons)

National

- Any radio listenership has remained steady year on year at 86% of all adults (3,024,000 total – listened yesterday)
- Local radio continues its strong showing, posting a +2pp increase in listenership and also boosting market share (minutes listened) by 3pp.

Dublin

- Small drop in total listenership, down 1pp to 85% of all Dublin adults (830,000 – listened yesterday)
- Similar to the national pictures, local radio in Dublin has shown further growth, improving its market share by 2pp year on year.

National Stations (year-on-year comparison)

RTE Radio 1

- Radio 1 has posted a small drop in total listenership, down 1pp on the period and in market share (down 0.5pp)
- There has been growth in the station's core ABC1 listenership, up 1pp both nationally and in Dublin and up an impressive 3pp in Cork.
- Mixed results in key programming; Morning Ireland lost 18,000 listeners but both Pat Kenny (adding 9,000 listeners) and Drivetime with Mary Wilson (adding 6,000 listeners) showing gains year on year.

RTE 2FM

- Poor results for 2FM overall, with drops in total listeners (-2pp) and across all key audiences: 15-34s & Housekeepers (-2pp) and ABC1s (-1pp)
- In terms of programming, the 2FM Breakfast Show lost 18,000 listeners with Will Leahy's evening slot losing 15,000 listeners which is a real concern.
- Ryan Tubridy will assume the 9-11am slot on 2FM from September, replacing the late Gerry Ryan.

National Stations (year on year comparison)

Newstalk

- Total listenership remains steady year on year with the station showing a small gain in terms of market share (+0.3pp)
- Strong performance in Cork with total listenership up 3pp
- Key programmes showed positive gains with The Breakfast Show adding 2,000 listeners and The Right Hook adding a further 1,000 listeners during the period.

Today FM

- Today FM shows slight declines in total listenership (-1pp) and against all key audiences: 15-34s (-2pp), ABC1s (-1pp) and Housekeepers (-1pp)
- Station market share also down nationally by -1pp
- Better performance achieved in Dublin ,however,, with gains across all key audience groups.
- Further losses for key programmes: Ian Dempsey loses 20,000 listeners and The Last Word shedding 19,000 listeners year on year.
- Ray D'Arcy was one positive, adding 3,000 listeners year on year.

Local/Multi Region Stations (year-on-year comparison)

4FM (Multi City)

- 4FM have increased their daily reach figure to 3%
- The station has recently re-launched with a new TV and Outdoor advertising campaign which they hope will help boost awareness of the station offering and the available tuning frequencies in each broadcast area.

Local Radio

- Very strong performance for local radio, with overall listenership increasing by +2pp year on year - now at 58% of all adults (2,049,000 adults – listened yesterday)
- Further gains also achieved with 15-34s (+2pp) and Housekeepers (+2pp)
- Market share also increased by +3pp during the period which demonstrates the strength and role of local radio in Ireland.

Dublin Stations (year on year comparison)

FM104

- Small decline in overall listenership (-1pp) year on year but FM104 retains its position as number one station in Dublin.
- On the programme front, the Strawberry Alarm Clock has lost 11,000 listeners year on year but the FM104 Phone Show with Adrian Kennedy continues to improve, adding an impressive 5,000 listeners during the period.

Dublin's 98

- Slight decline in total listenership for 98FM, down 1pp year on year.
- Drop of 2pp against the ABC1 & 15-34 demographics
- The Morning Crew morning drivetime show, although losing 1,000 listeners, is now ahead of its main rival, FM104s Strawberry Alarm Clock, with 8,000 plus listeners per average quarter hour.

Dublin Stations (year on year comparison)

Spin 103.8

- Listenership remained steady year on year for all adults and the stations core 15-34 demographic.
- The station's key 1900-2400 daypart shows a steep decline in terms of market share - down 10pp year on year amongst 15-34s.

Q102

- Good performance overall for Q102, with overall listenership increasing by 1pp
- Very impressive gains with 15-34s, up 5pp year on year and increases also with ABC1s (+2pp) and Housekeepers (+1pp)
- The More Music Breakfast Show added a further 3,000 listeners.

Phantom

- Total station listenership remains static year on year
- Slight drop of 1pp with 15-34 audience
- Primetime (0700-1900) market share shows further decline - down -1pp year on year.

Cork and Regional Stations (year on year comparisons)

Cork 96/103

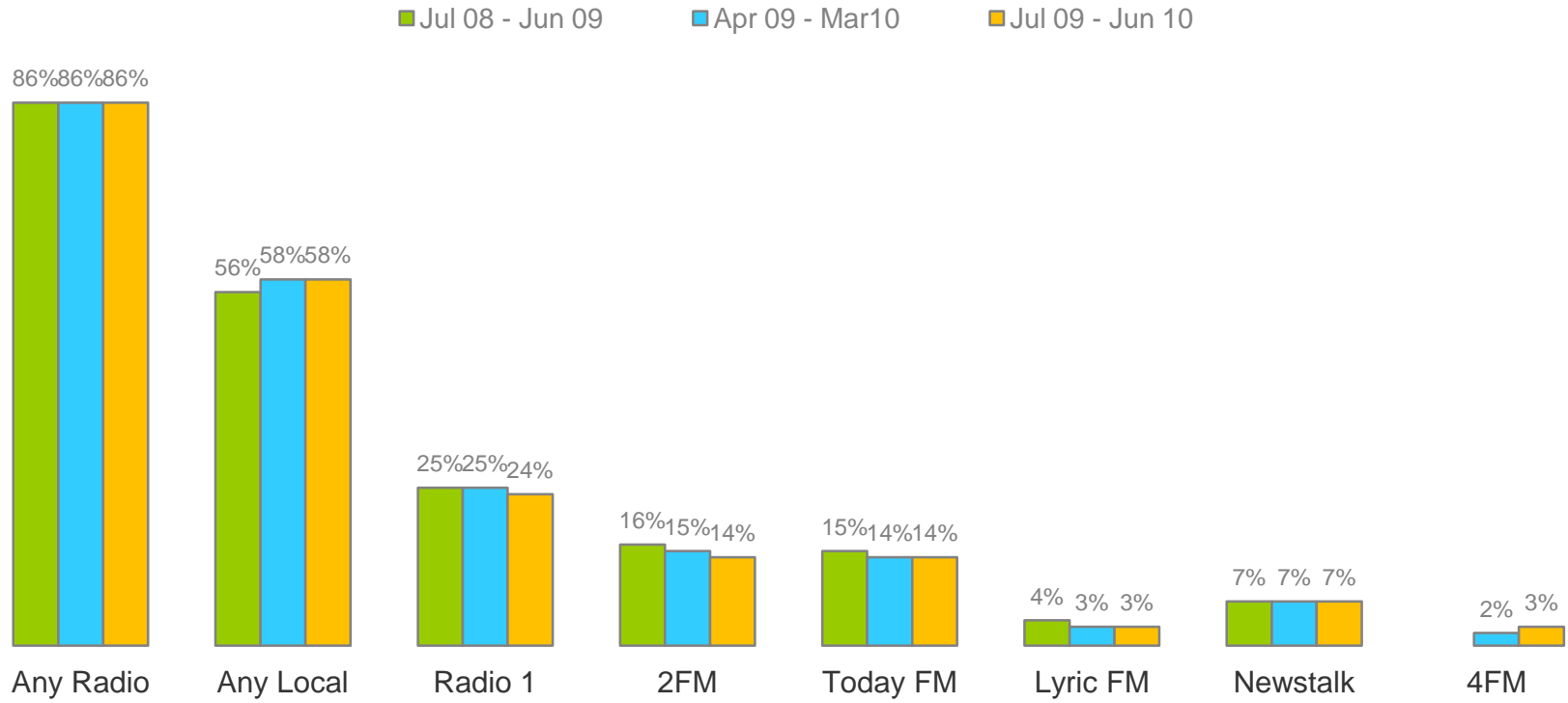
- Small decline in total listenership year on year, -1pp
- Further strong gain amongst the ABC1 audience - up 4pp during the period

Red FM

- Increase of 2pp year on year with Red FM's core 15-34 audience
- Red FM's TAP (0700-2400) market share for 15-34s showed an improvement of +5pp year on year.

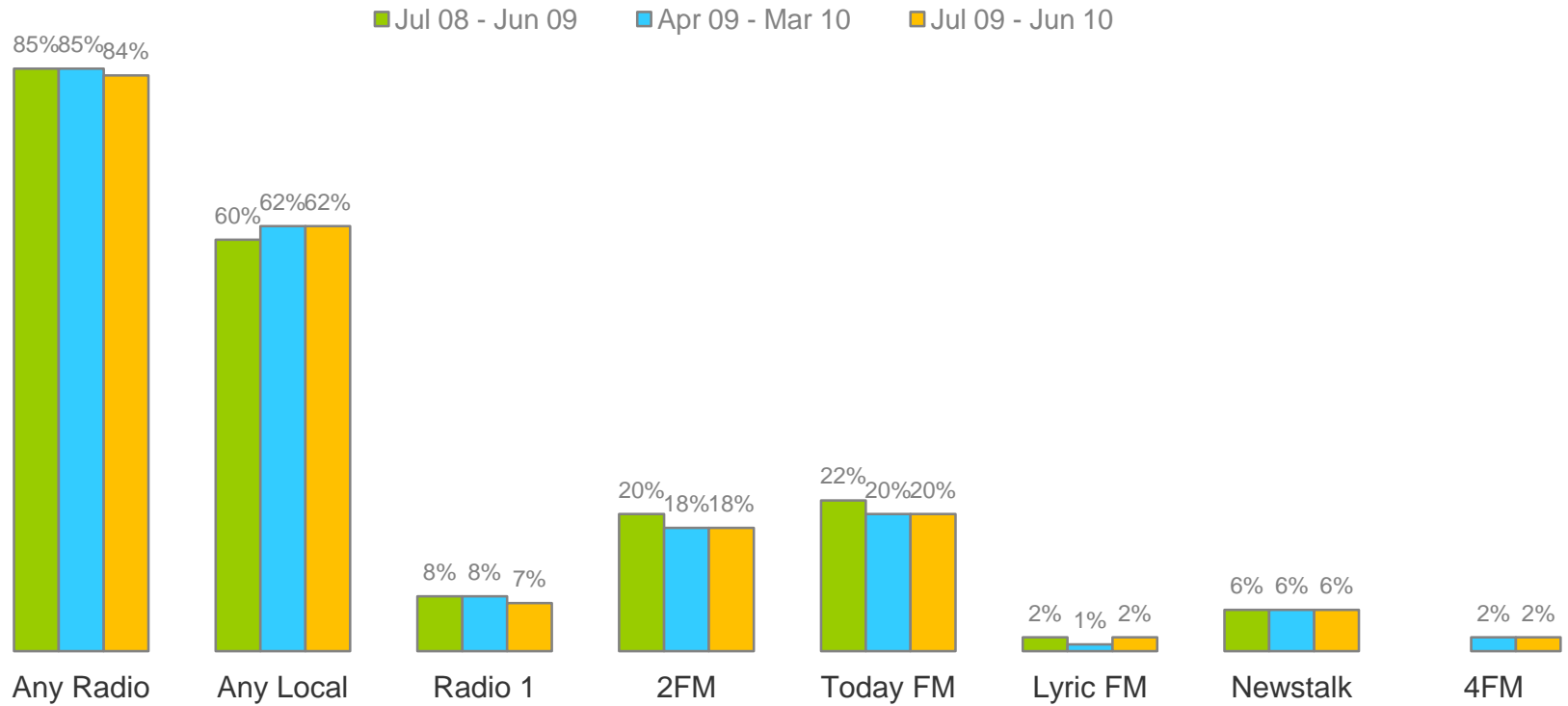
National Market

National Weekday Listenership - All Adults



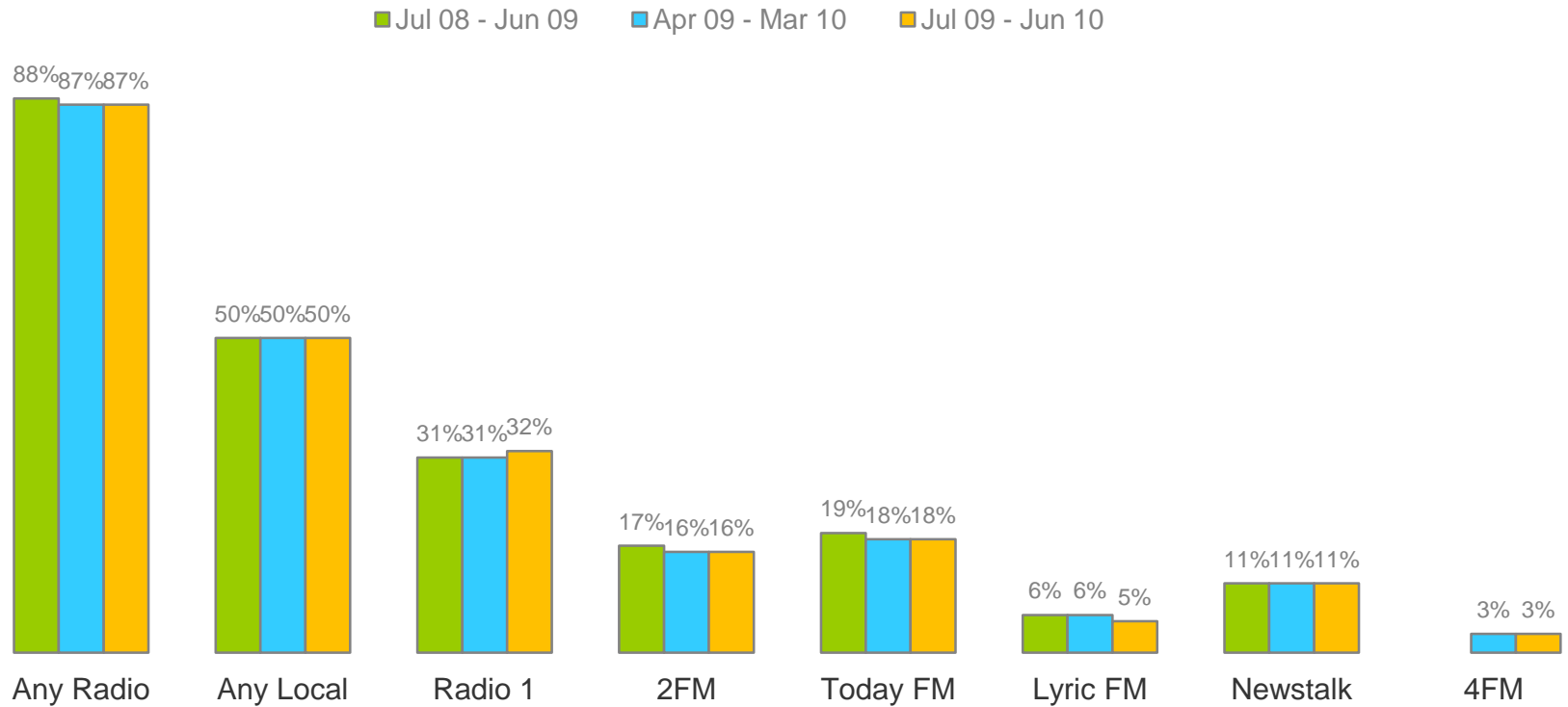
Source: JNLR Average weekday yesterday listenership

National Weekday Listenership - 15-34 Adults



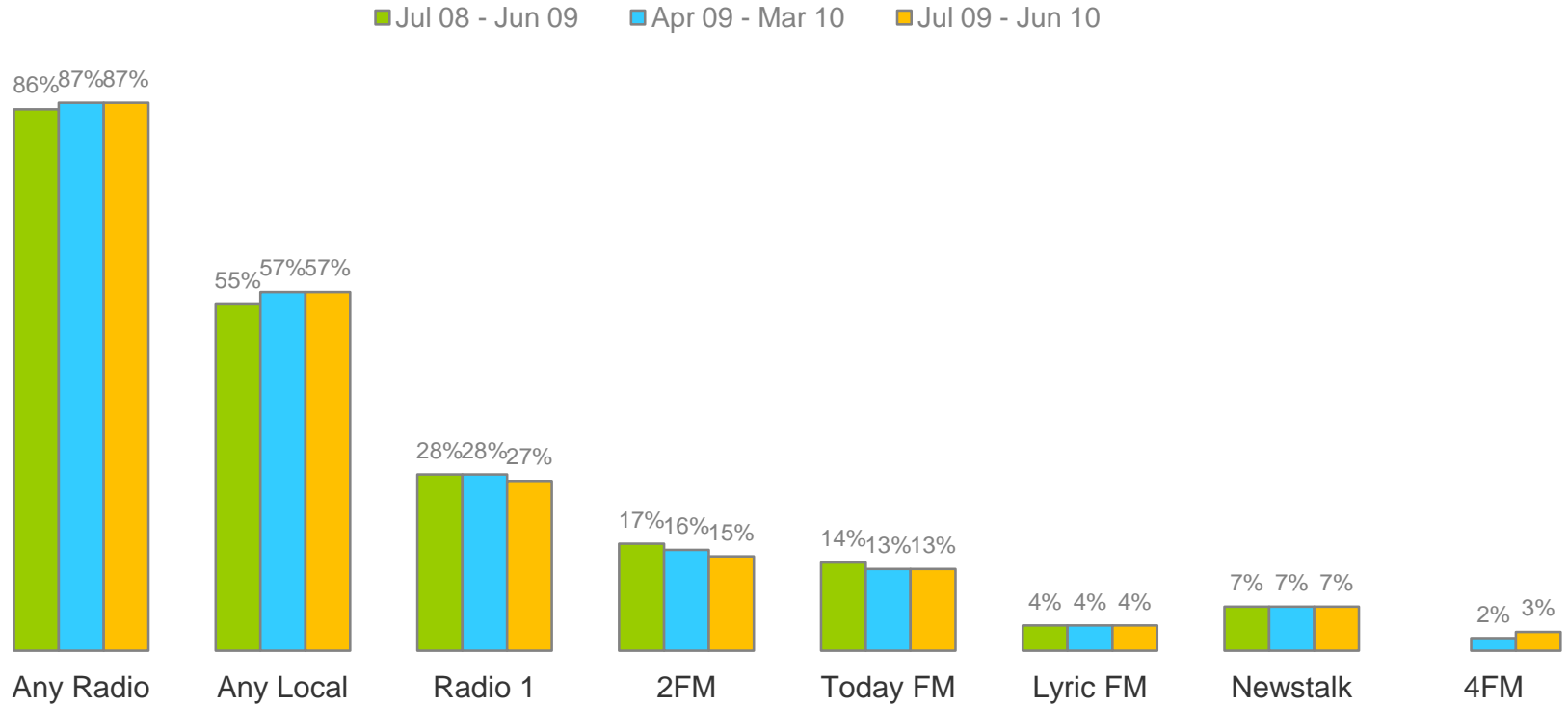
Source: JNLR Average weekday listenership

National Weekday Listenership - ABC1 Adults



Source: JNLR Average weekday listenership

National Weekday Listenership - Housekeepers

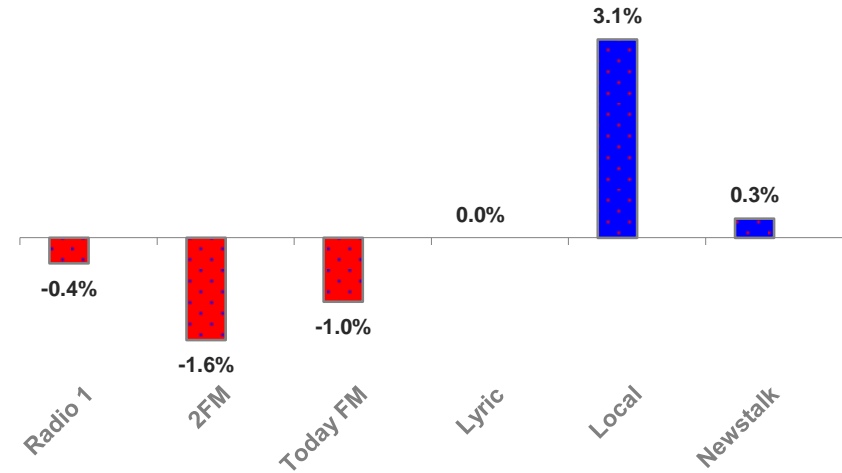
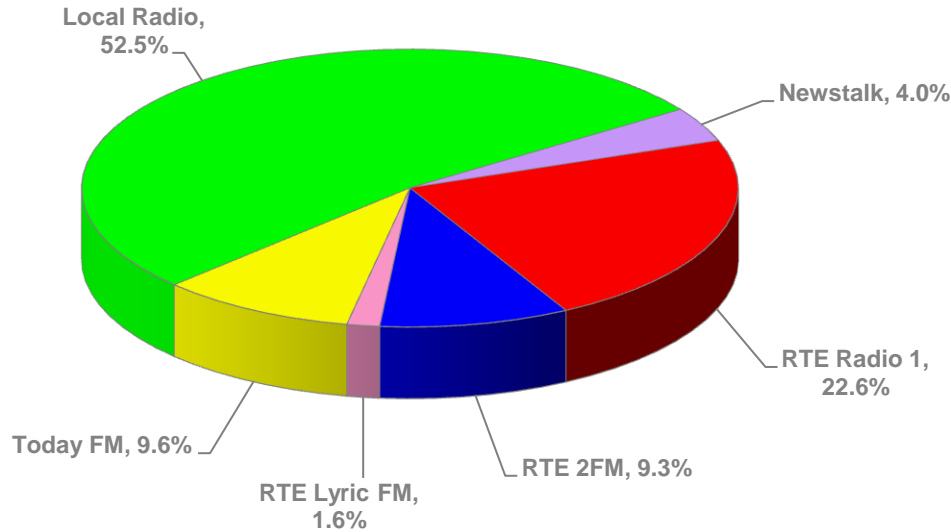


Source: JNLR Average weekday listenership

National Market Share (Weekdays 7am-7pm) All Adults

Jul 09 – Jun 10

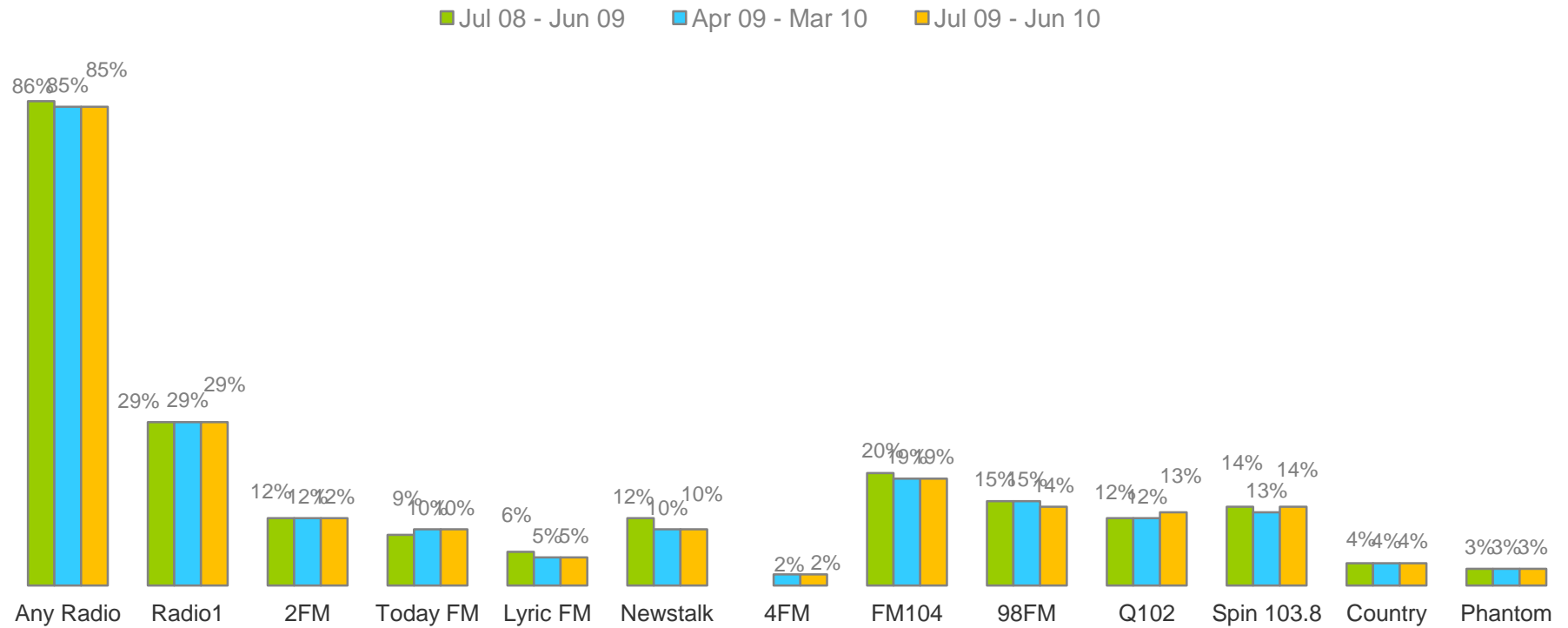
% Point Change vs. Jul 08 – Jun 09



Source: JNLR Market Share (Total Minutes Listened) 7am-7pm

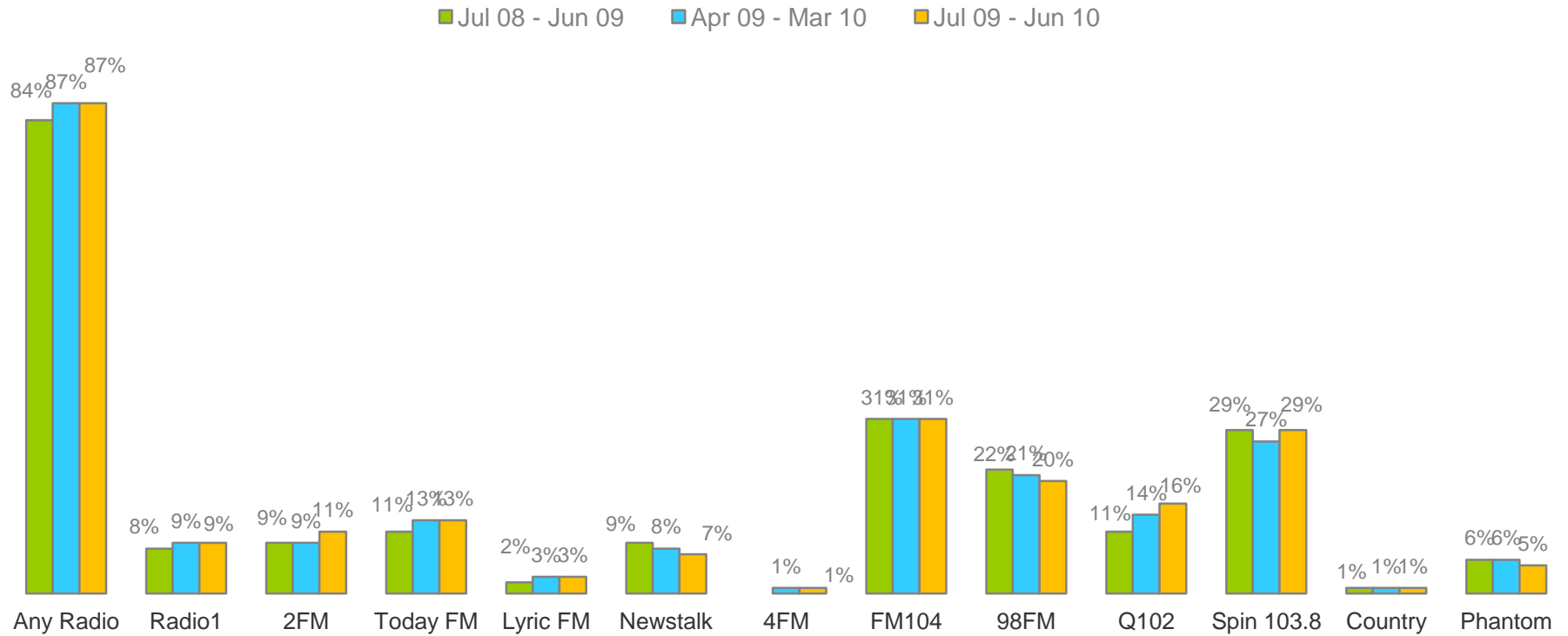
Dublin Market

Dublin Weekday Listenership - All Adults



Source: JNLR average weekday listenership

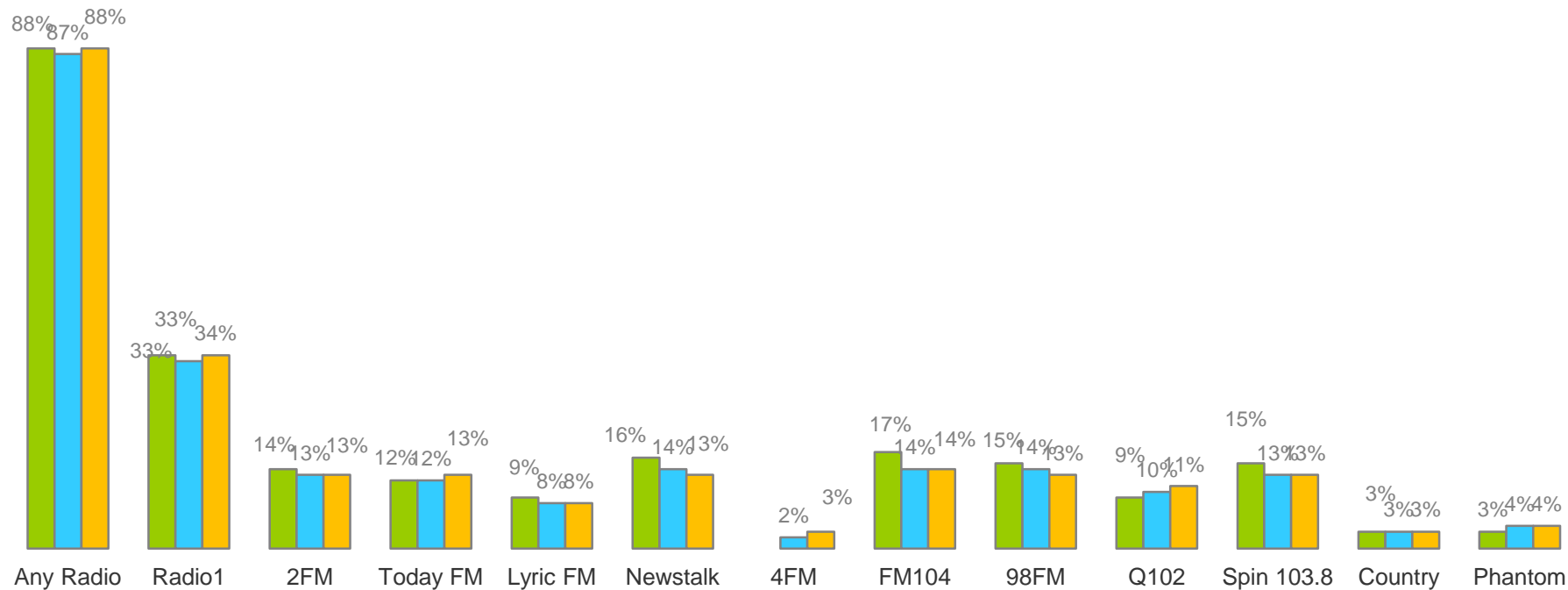
Dublin Weekday Listenership 15-34 Adults



Source: JNLR average weekday listenership

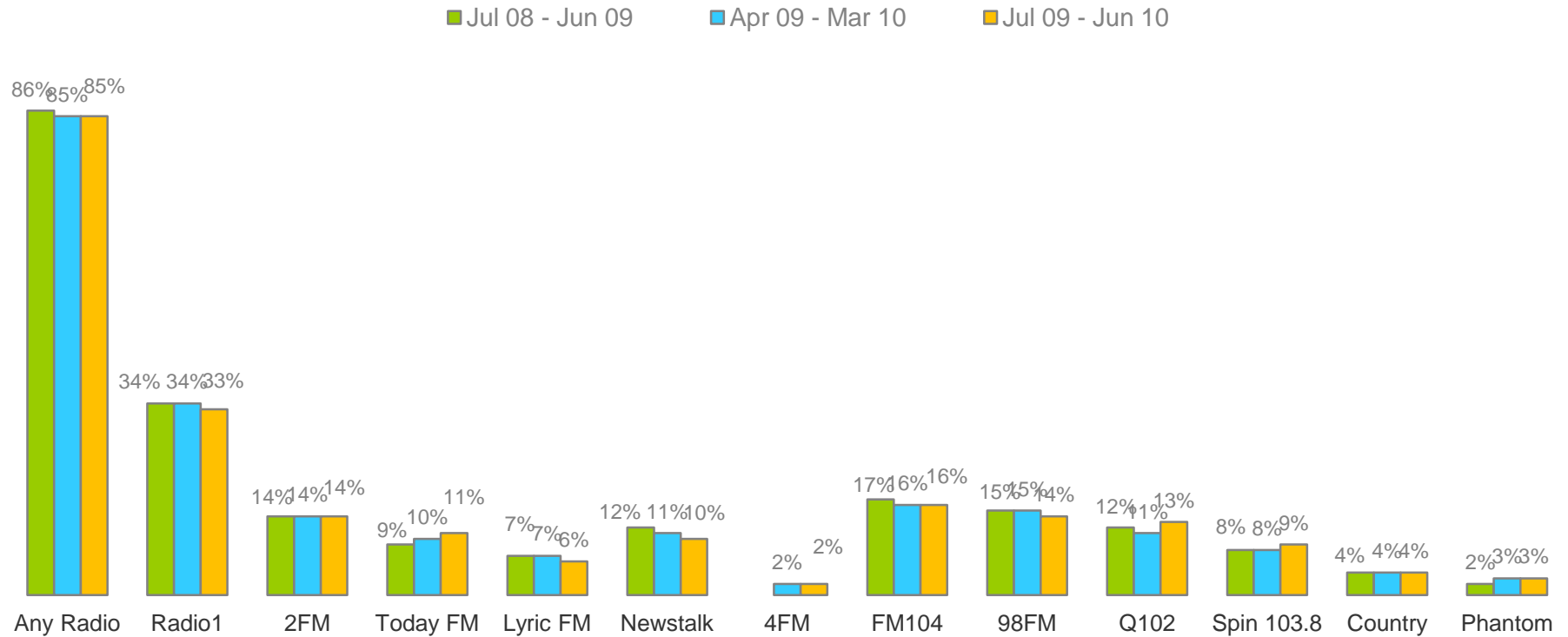
Dublin Weekday Listenership - ABC1 Adults

■ Jul 08 - Jun 09
 ■ Apr 09 - Mar 10
 ■ Jul 09 - Jun 10



Source: JNLR average weekday listenership

Dublin Weekday Listenership - Housekeepers

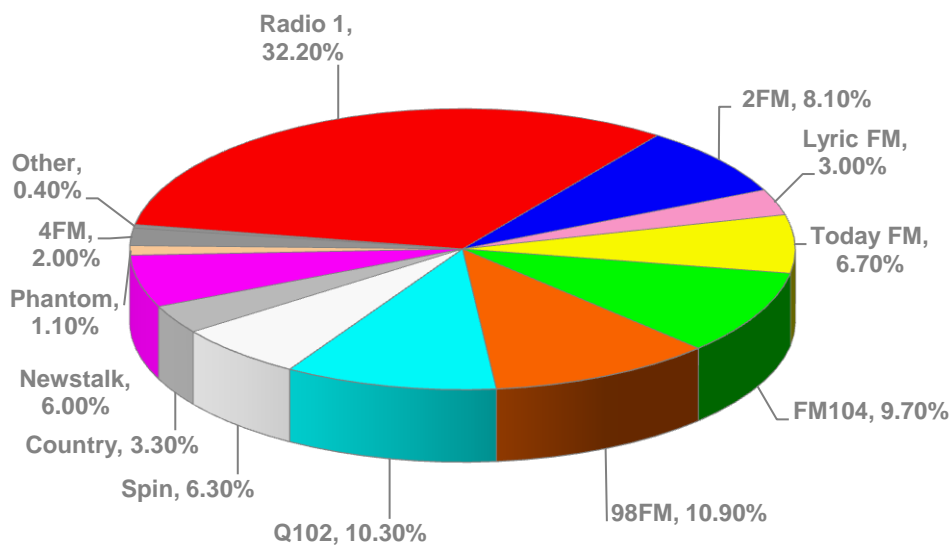


Source: JNLR average weekday listenership

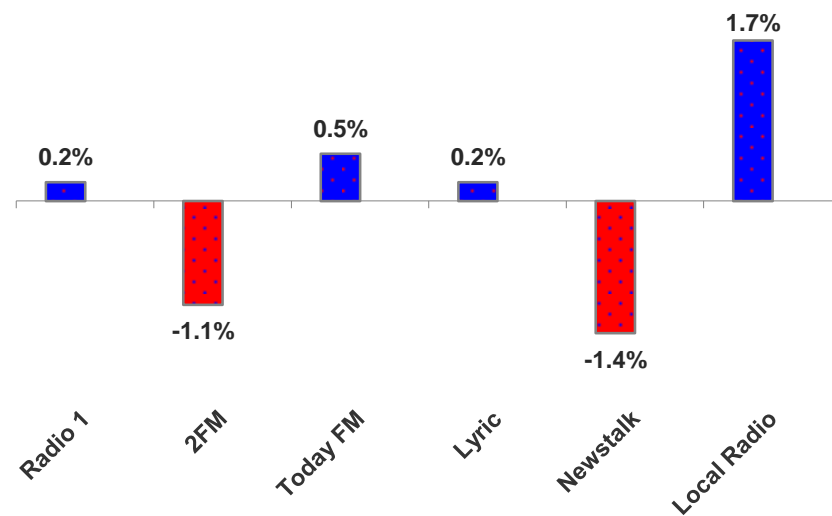
Dublin Market Share (Weekdays 7am-7pm)

All Adults

Jul 09 – Jun 10



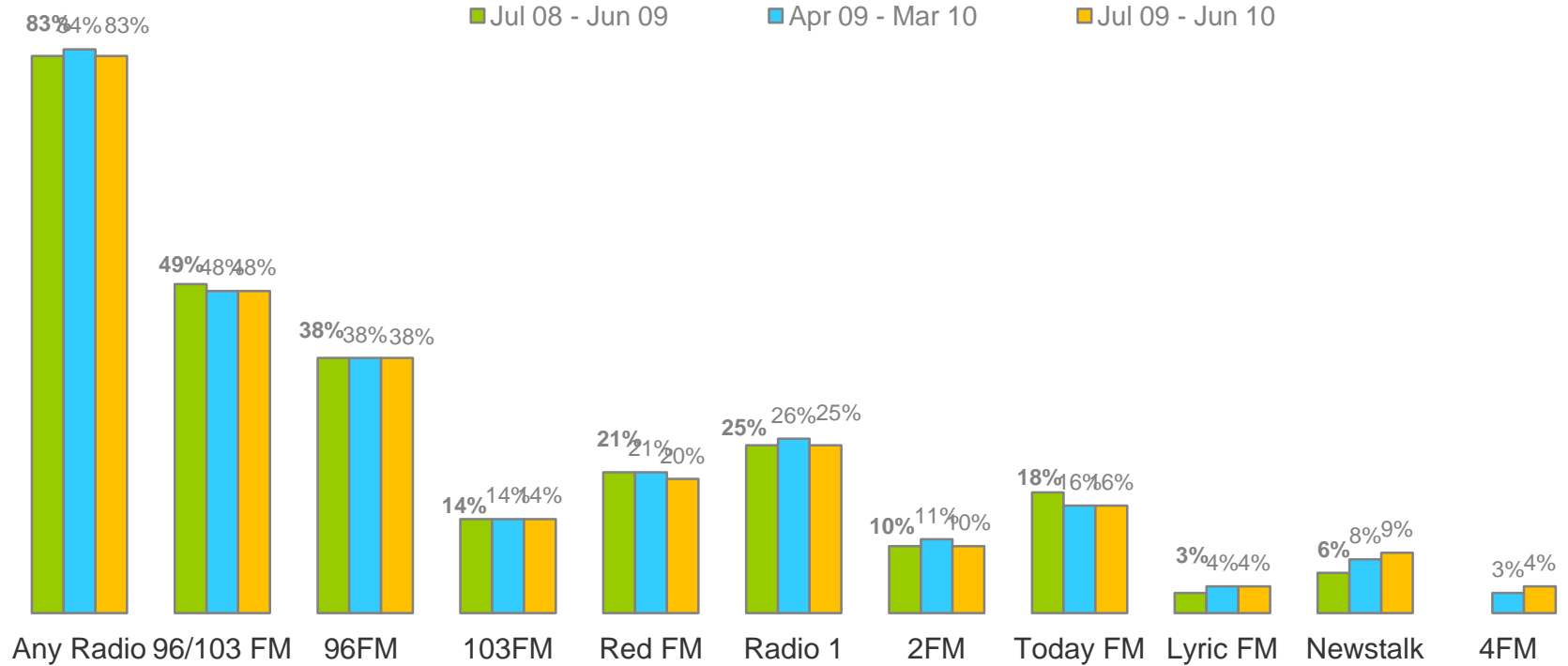
% Point Change vs. Jul 08 – Jun 09



Source: JNLR market Share (Total Minutes Listened) 7am-7pm

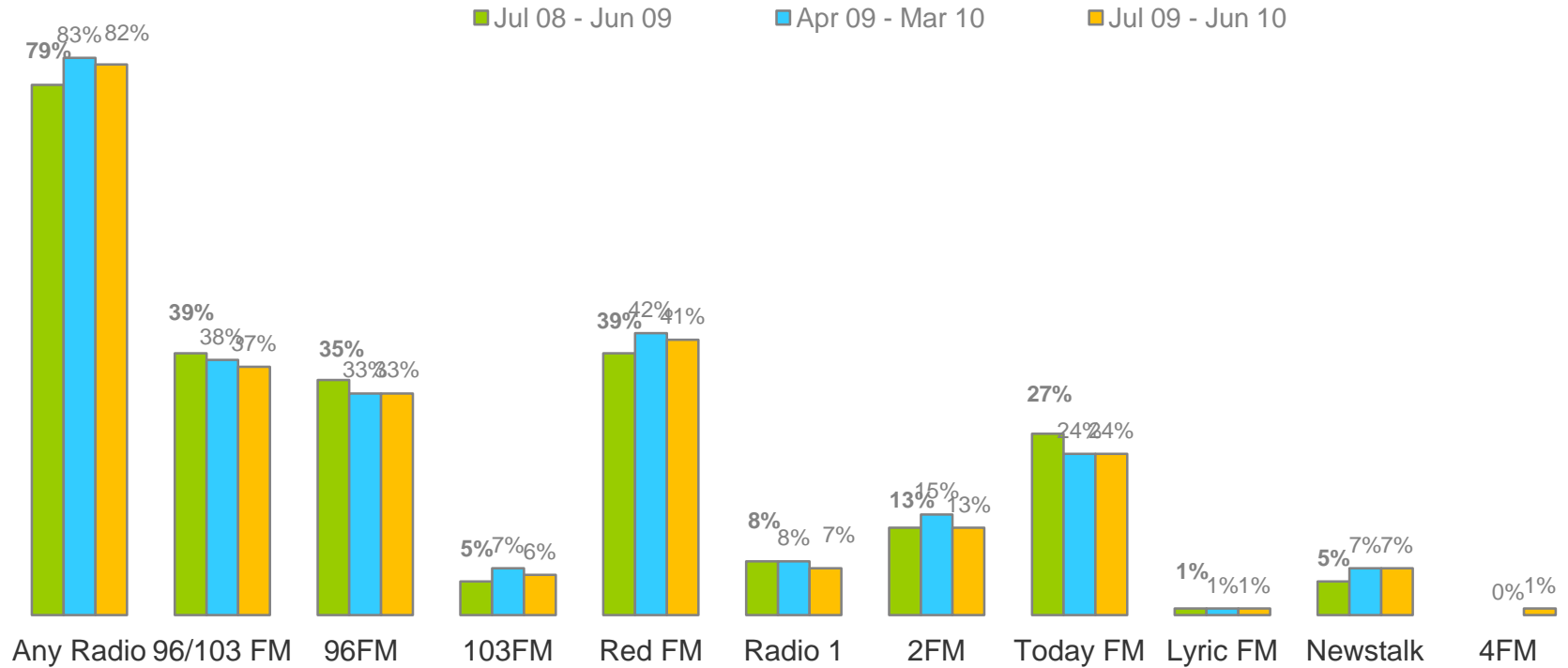
Cork Market

Cork Weekday Listenership - All Adults



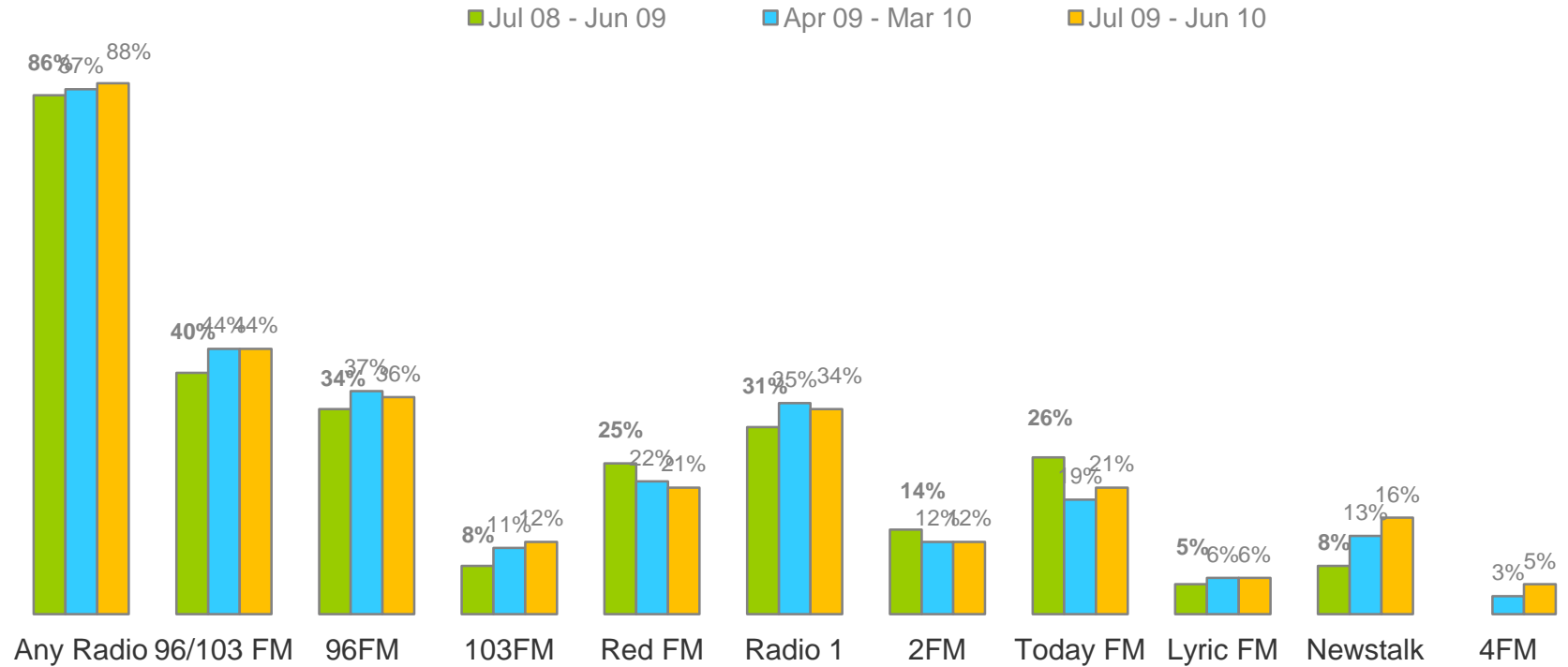
Source: JNLR Average weekday listenership

Cork Weekday Listenership 15-34 Adults



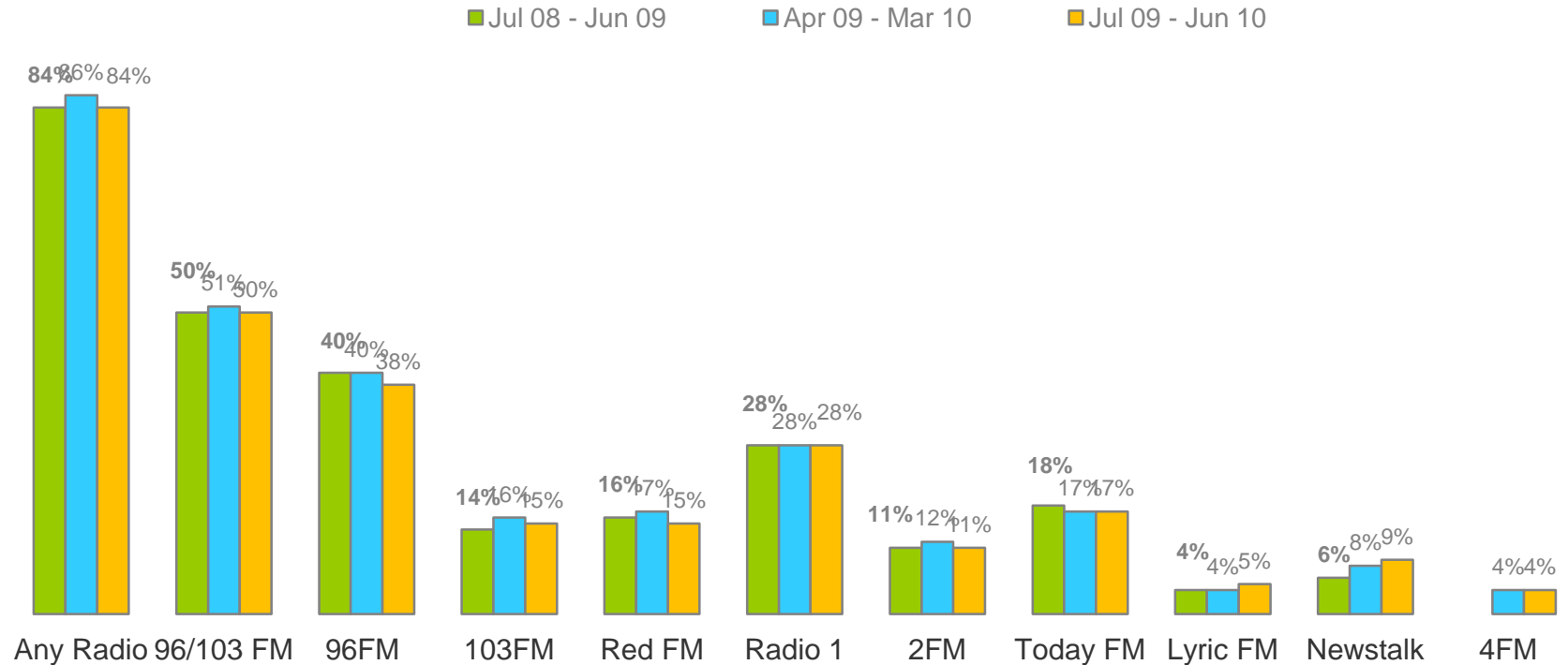
Source: JNLR Average weekday listenership

Cork Weekday Listenership - ABC1 Adults



Source: JNLR Average weekday listenership

Cork Weekday Listenership - Housekeepers



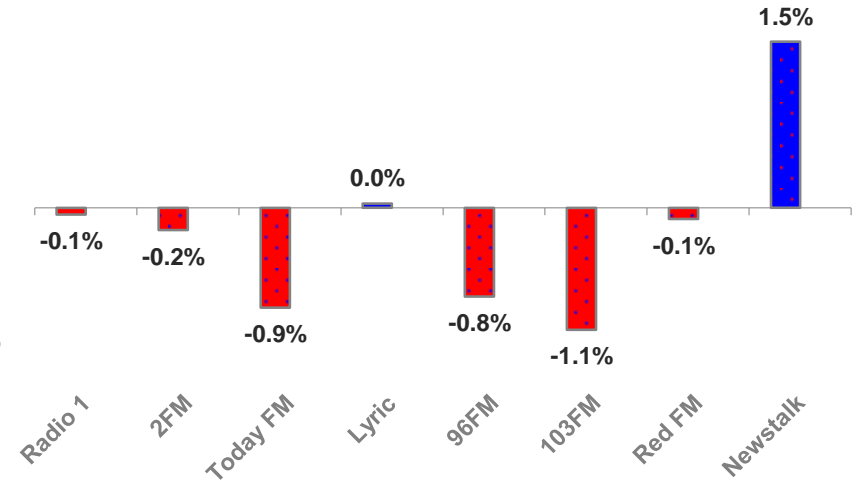
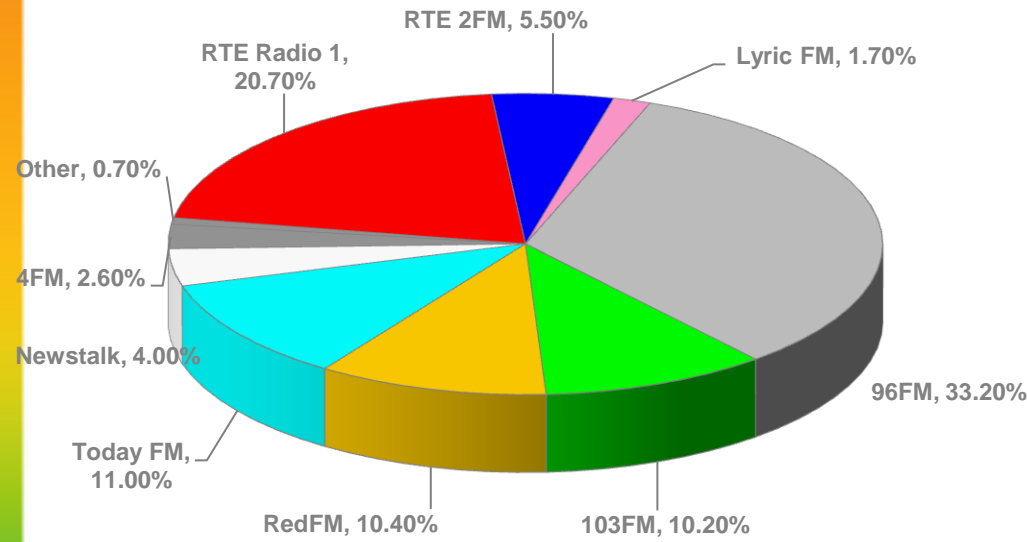
Source: JNLR Average weekday listenership

Cork Market Share (Weekdays 7am-7pm)

All Adults

Jul 09 – Jun 10

% Point Change vs. Jul 08 – Jun 09

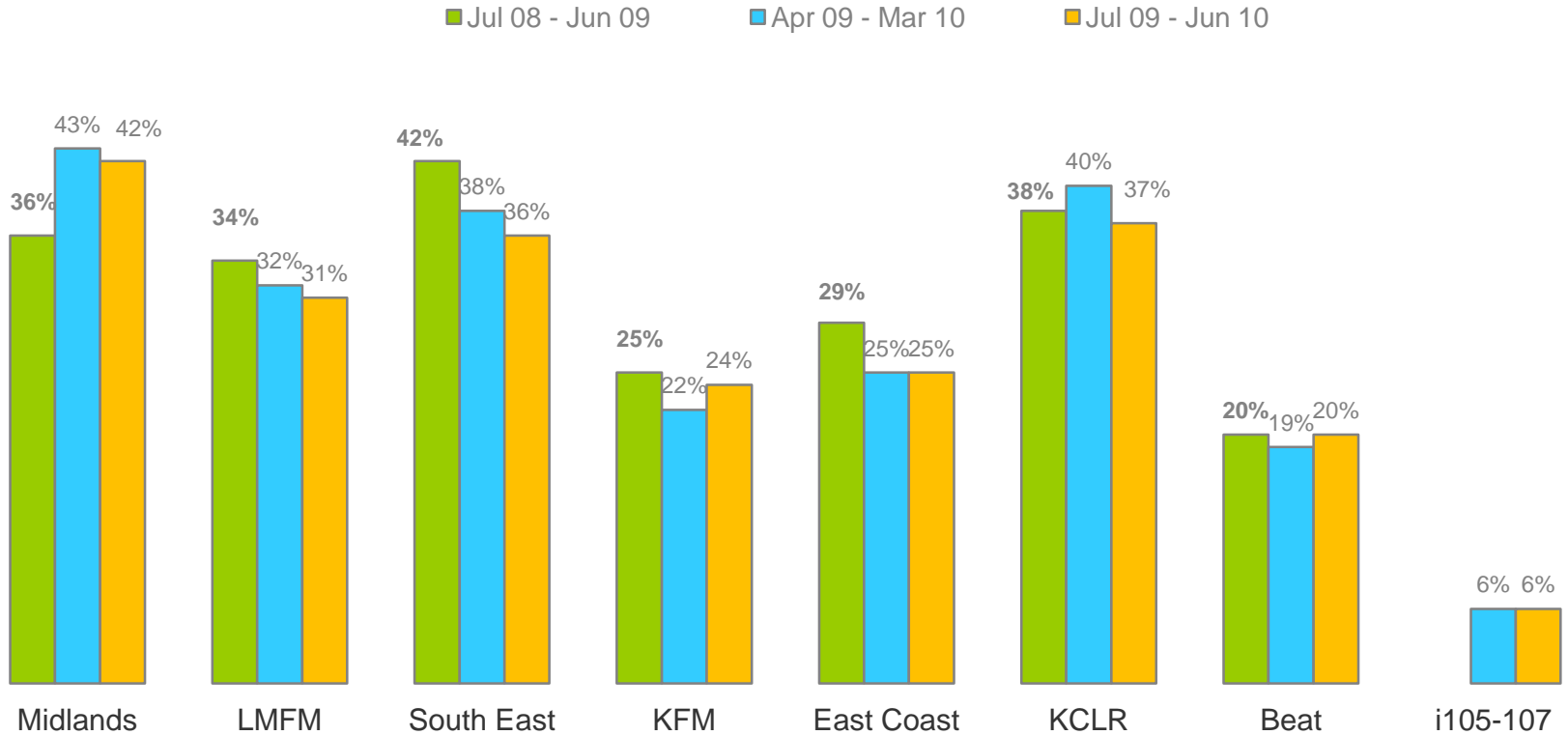


Source: JNLR Market Share (Total Minutes Listened) 7am-7pm

Local Stations (excl. Dublin & Cork)

Local (excl. Dublin and Cork) Weekday Listenership

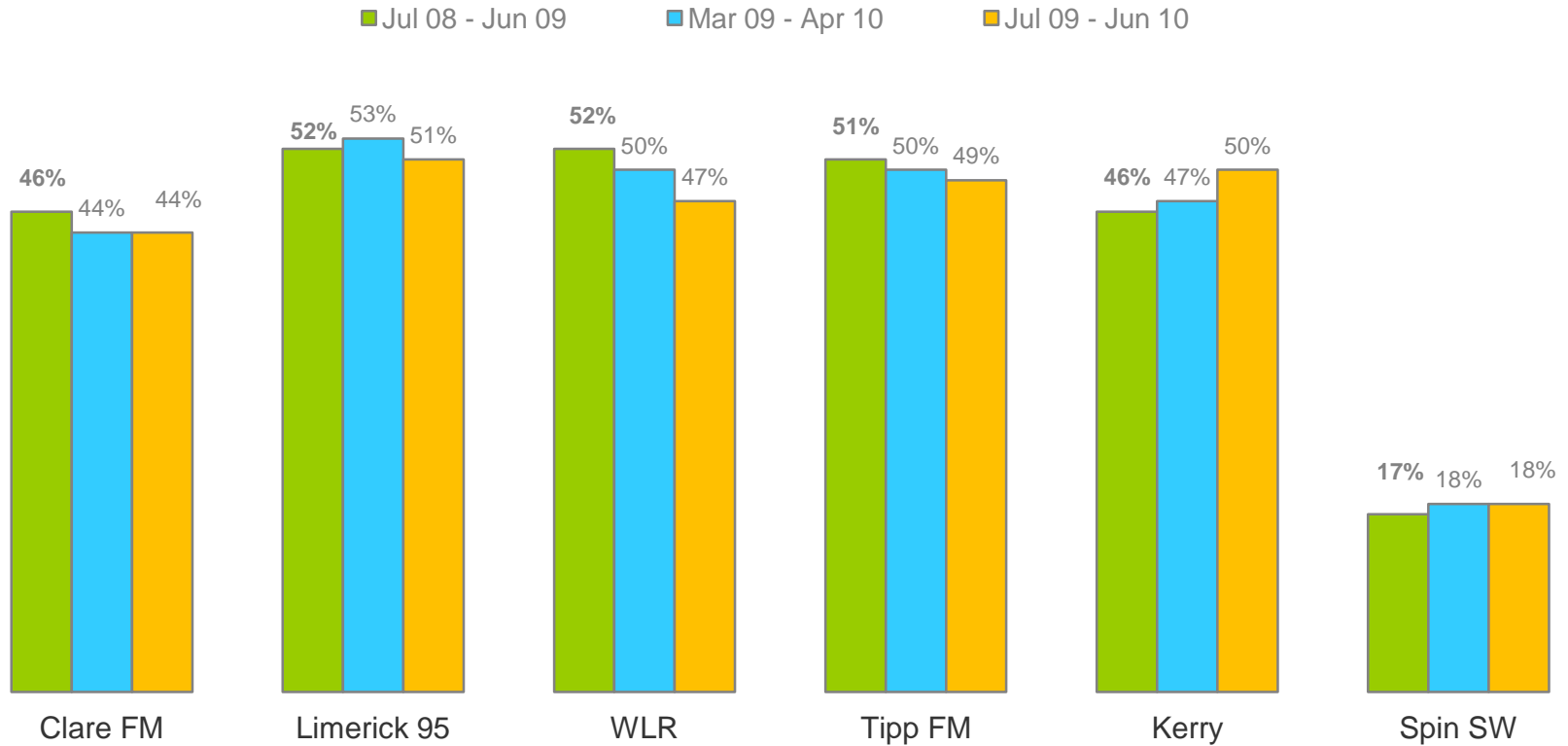
All Adults - Leinster



Source: JNLR Average weekday listenership
 i105-107 on-air since Nov '08

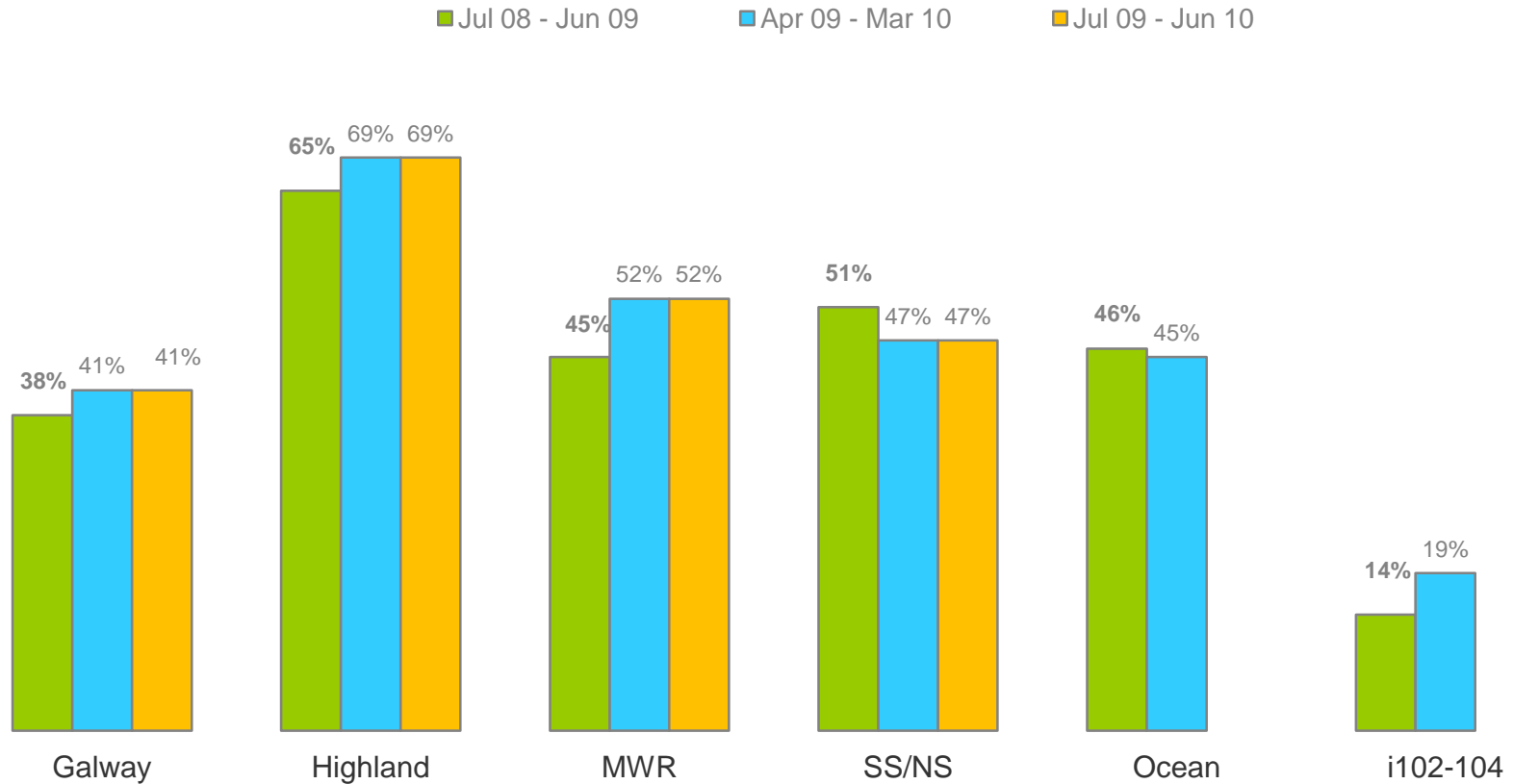
Local (excl. Dublin and Cork) Weekday Listenership

All Adults - Munster



Source: JNLR Average weekday listenership

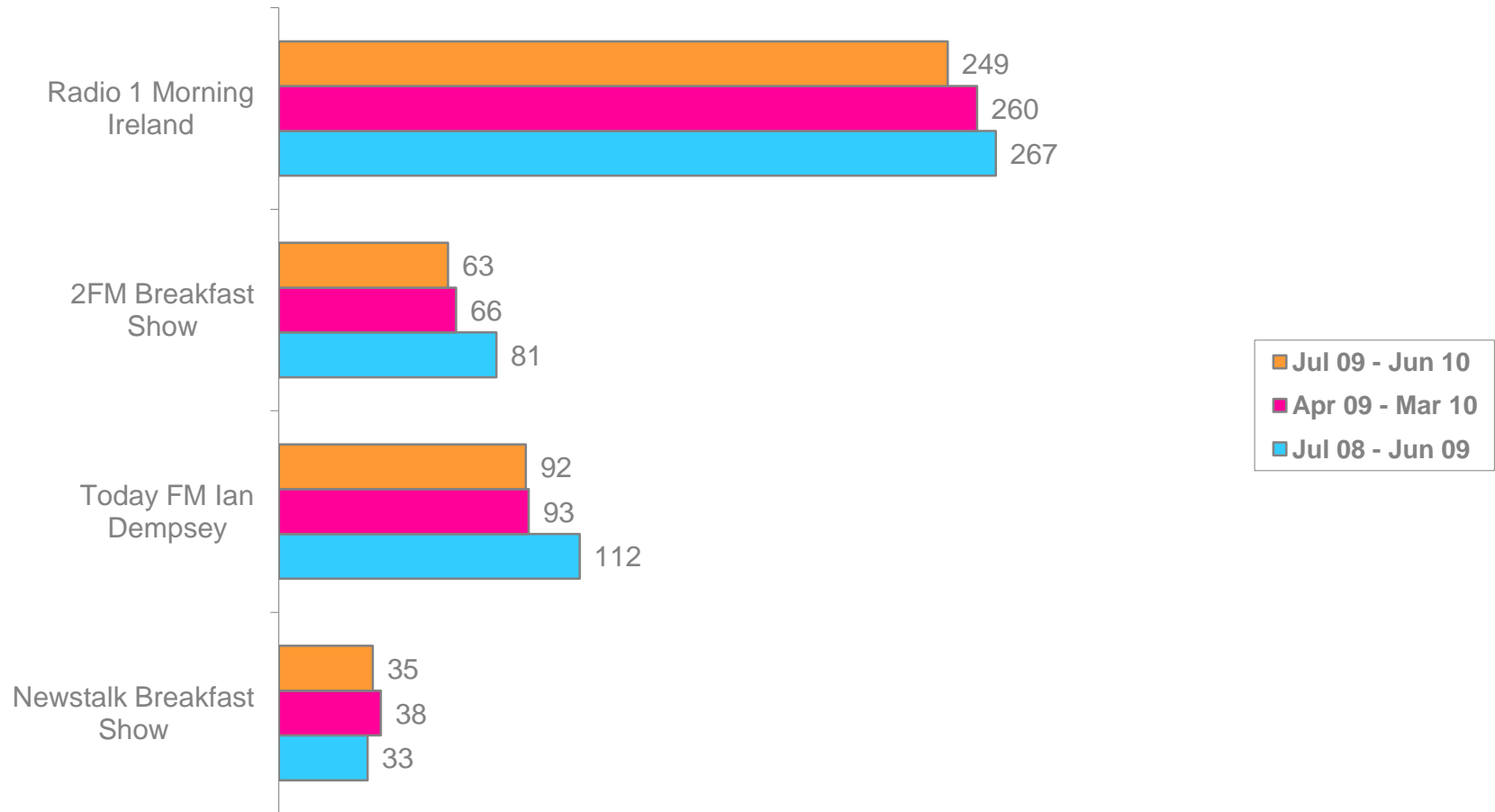
Local (excl. Dublin and Cork) Weekday Listenership All Adults – Connacht/Ulster



Source: JNLR Average weekday listenership

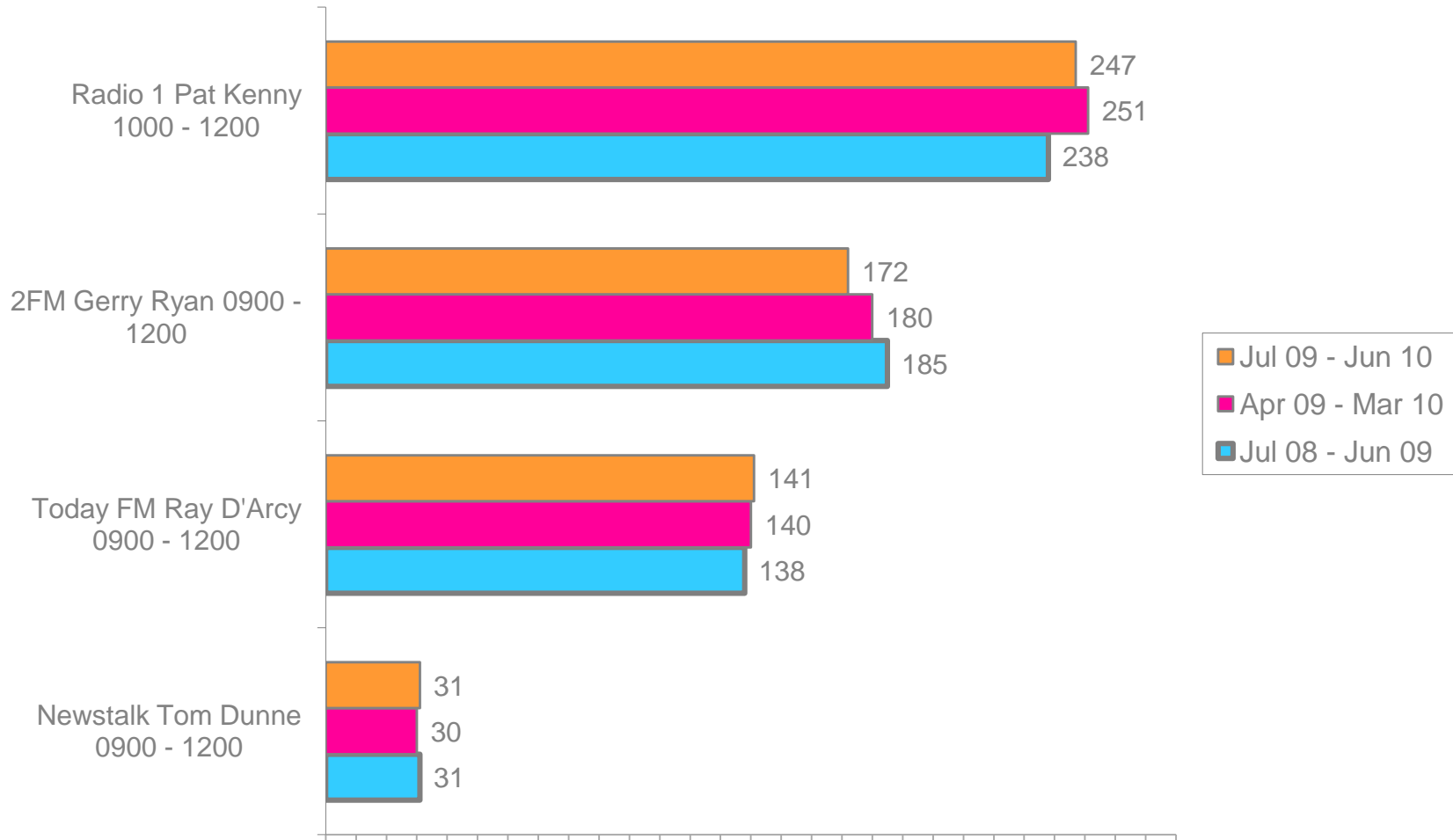
Programme Review

National Breakfast Shows (0700- 0900 Average adult audience)



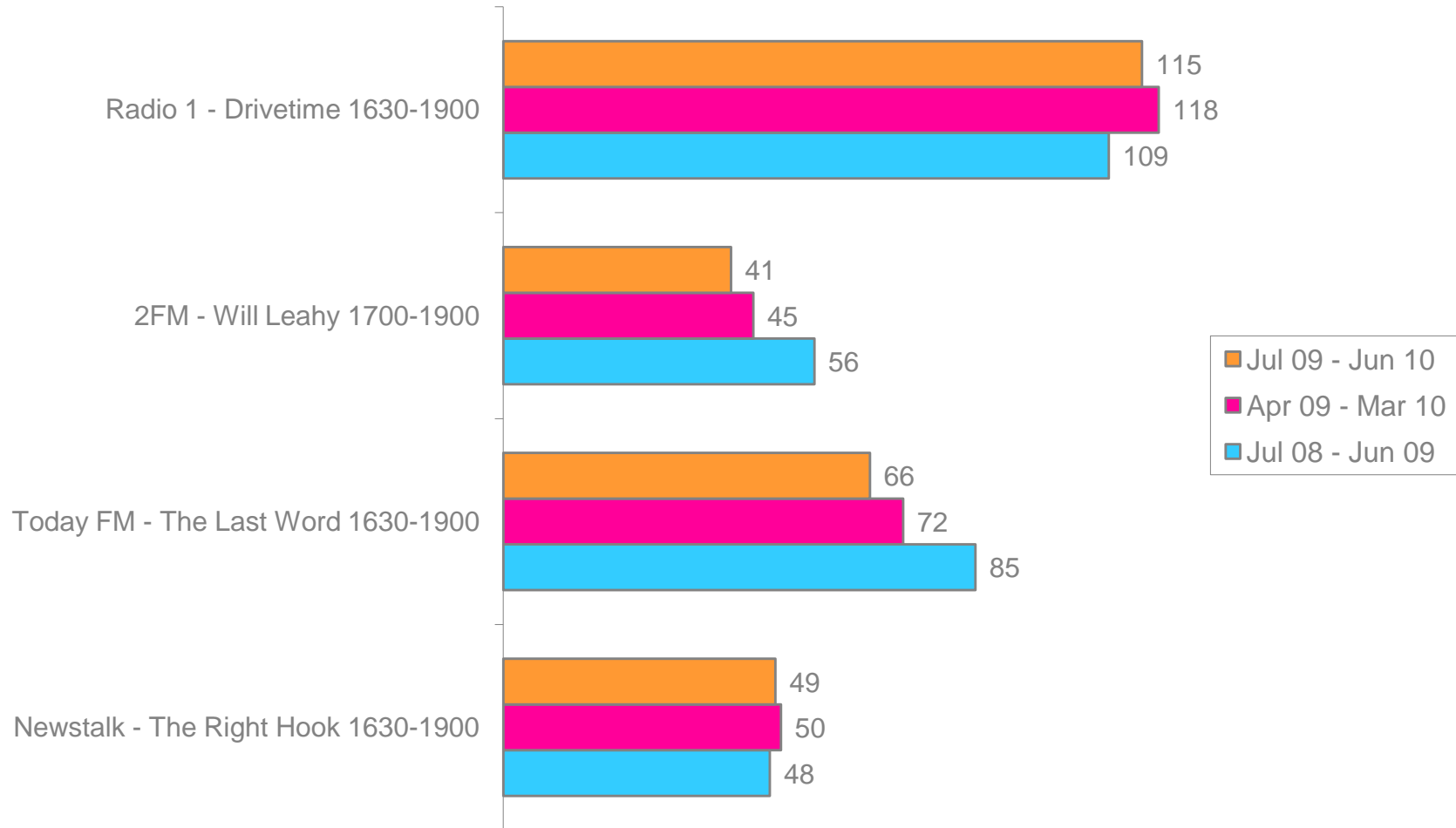
Source: JNLR Average quarter hour audience for the programme segment

National Mid Morning Shows (Average adult audience)



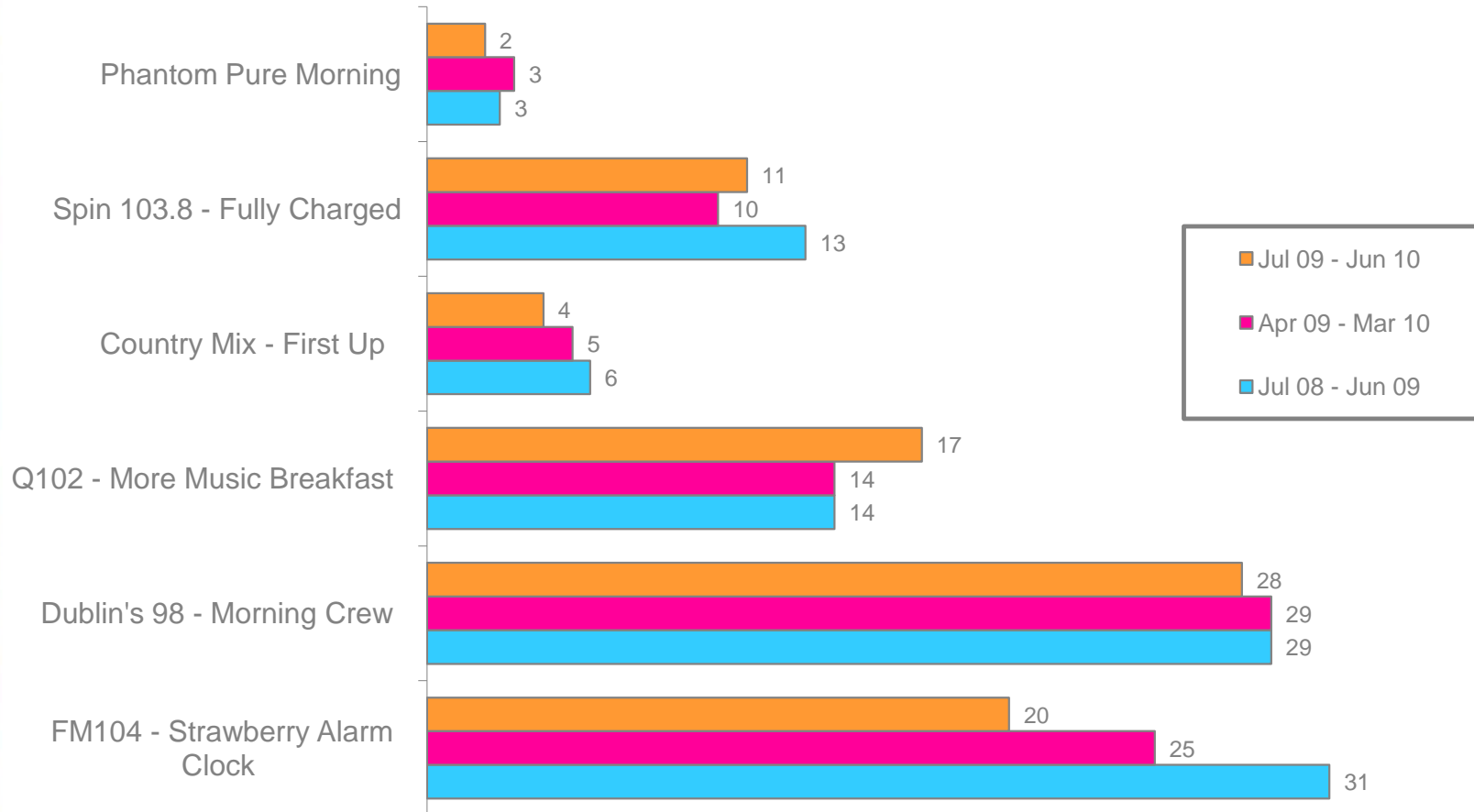
Source: JNLR Average quarter hour audience for the programme segment

National Evening Drivetime Shows (Average adult audience)



Source: JNLR Average quarter hour audience for the programme segment

Dublin Breakfast Shows (0700-0900 Average adult audience)



Source: JNLR Average quarter hour audience for the programme segment



Thank You