

THE LATEST RADIO SURVEY

A 10-MINUTE READ TO BRING YOU UP TO SPEED



OVERALL LISTENING TRENDS

While radio ad revenue is still highly challenged, audiences are holding up well across most parts of the country, according to the very latest JNLR survey released yesterday. The report, which covers the period July 2010 to June 2011, shows that 85% of adults tune in each day with the average time spent listening remaining rock solid at 4.2 hours per weekday. The changes from survey to survey are often quite slight and given the competitive nature of the sector, are subject to hype and exaggeration by many operators. This report is designed to provide you with an independent summary of the key findings.

NATIONAL

The news-based stations did well on the back of the Spring General Election. Radio1 added 15,000 extra listeners on a typical weekday, while Newstalk rose by 21,000 per day. 2FM will be disappointed by its loss of market share and 100,000 daily listeners at a time when it undertook a major shake up of its daily schedule. Today FM also lost audience (-33,000) with the newer regional youth stations carving out share from both national players.

DAILY REACH	Jul'10-Jun'11	Jul'09-Jun'10	Diff in 000's	7am-7pm share
RTE Radio 1	25%	24%	+15	23.5%
2FM	11%	14%	-102	7.3%
RTE Lyric FM	3%	3%	-5	1.6%
Today FM	13%	14%	-33	8.9%
Newstalk	8%	7%	+21	4.1%

KEY SHOWS

The biggest show nationally continues to be 'Morning Ireland'. It's numbers grew steadily during the Election period by 29,000 to 460,000 adults per day. Over at its current affairs rival, Newstalk, the breakfast news show with Ivan Yates and Chris Donoghue has also continued to grow. It's added 40,000 listeners in the last year to stand at 110,000. On the national music stations, Ian Dempsey (152,000 adults) has lost listeners, but still leads Hector's Breakfast show on 2FM (130,000).

Across the morning segment, the performances have been mixed – John Murray (at 328,000), has lost 29,000 since taking over from Ryan Turbidity. Pat Kenny is relatively unchanged at 328,000, while Ray Darcy on Today FM lost 23,000 to 212,000).

During the evening drivetime segment, Radio1's Mary Wilson continued to lead with 245,000, followed by The Last Word (155,000) and The Right Hook (119,000).

There will also be a natural curiosity in how Neil Prendeville's show on Cork 96fm has performed since his return in March. The JNLR data is averaged over the year so it's impossible to determine exactly what happened during his absence. Having said that the daily reach figure for the 12-month period has risen by 15,000 to 125,000, making it again the best-listened to show in the region.

DUBLIN

As one of the most competitive radio markets in Europe, Dublin is always worthy of closer scrutiny. The national news stations tend to perform better in the capital than almost anywhere else and they have both added listeners: Radio1 (+12,000) and Newstalk (+26,000). Amongst the music stations, FM104 is the definite market leader. It has grown reach and share in this book, at the expense it would seem, of 98FM and 2FM. FM104's popularity was also underscored by recently hitting the 100,000 Facebook fan mark. Its stable mate, Q102, has also done well over recent JNLR's, growing share amongst 35-44's, in particular. Spin is now the second most popular music station in the city with 15% reach although its overall market share of 5.9% reflects its younger skew.

DAILY REACH	Jul'10-Jun'11	Jul'09-Jun'10	Diff in 000's	7am-7pm share
FM104	21%	19%	+24	12.4%
98FM	13%	14%	-7	9.0%
Q102	13%	13%	-4	10.7%
SPIN 1038	15%	14%	+3	5.9%
PHANTOM 105.2	2%	3%	-5	0.8%
SUNSHINE 106.8	4%	4%	-1	2.4%

MAIN CITIES

Local stations have held their overall share of national listening at just under 42%. Individual station performances have varied within the main cities though. In Cork, 96Fm and Red FM both lost audiences but C103 gained outside the city. The main stations in Limerick and Galway have also leaked numbers to the newer regional youth channels.

DAILY REACH	Jul'10-Jun'11	Jul'09-Jun'10	Diff in 000's	7am-7pm share
CORK – Cork 96fm	36%	38%	-8	31.8%
CORK – C103FM	17%	14%	+11	14.1%
CORK – Red FM	18%	20%	-7	10.7%
GALWAY - GBFM	36%	41%	-11	24.5%
LIMERICK – 95FM	48%	51%	-6	34.4%
WATERFORD - WLR	49%	47%	+2	48.5%

THE NEWCOMERS

The most recent radio arrivals have had mixed results. Multi-city station, 4FM, reported little change in its audience numbers – 53,000 tune in each day and 114,000 across the week. To be fair though, the station has just regrouped and changed its formula to 'Classic Hits 4FM' and hope to grow these numbers on the back of a large marketing investment. In contrast, Dublin's classic rock newcomer, Nova, continued to build on its launch success. It now has 55,000's adults listening daily across the Dublin commuter belt and its profile is a mix of males primarily but not just 'of a certain age' - almost half are aged under 35.