

REDC

iab ireland

Listen Up Ireland 2022

Irish Research into Digital Audio
Consumption & Behaviour

November 2022

Job Ref: 615622



Contents

- 01 | Digital Audio Consumption
- 02 | Digital Audio Behaviour
- 03 | Looking Towards the Future
- 04 | Key Findings & Recommendations



Objectives & Methodology

IAB Ireland have commissioned RED C Research to carry out research into digital audio consumption of the Irish population and track these behaviour over time.

Research was conducted to establish usage of Digital Audio in Ireland focusing on:

- Incidence & demographics of using Digital Audio
- Digital Audio channels used
- Time spent listening to Digital Audio
- Devices used for listening to Digital Audio
- Reasons to engage with Digital Audio
- Attitudes towards Digital Audio

Digital Audio is defined as radio, music or podcast that is accessed through an **online connection**. This includes live radio, catch up radio, podcast and music streaming services; all connected through a device that allows you to be online.

The survey was conducted online with a **nationally representative sample of n=1,003 adults aged 18+**, using RED C's online panel, RED C Live.

The 4th wave of the survey was conducted between the **21st – 27th October 2022**. Where possible, results have been compared to previous waves to show trends over time.



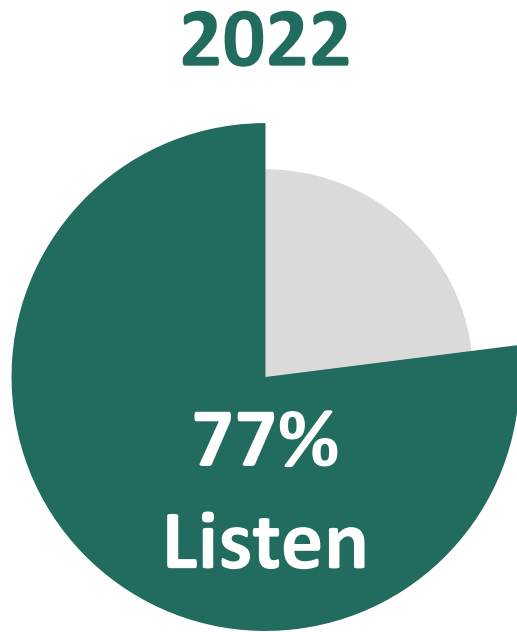
01

Digital Audio Consumption

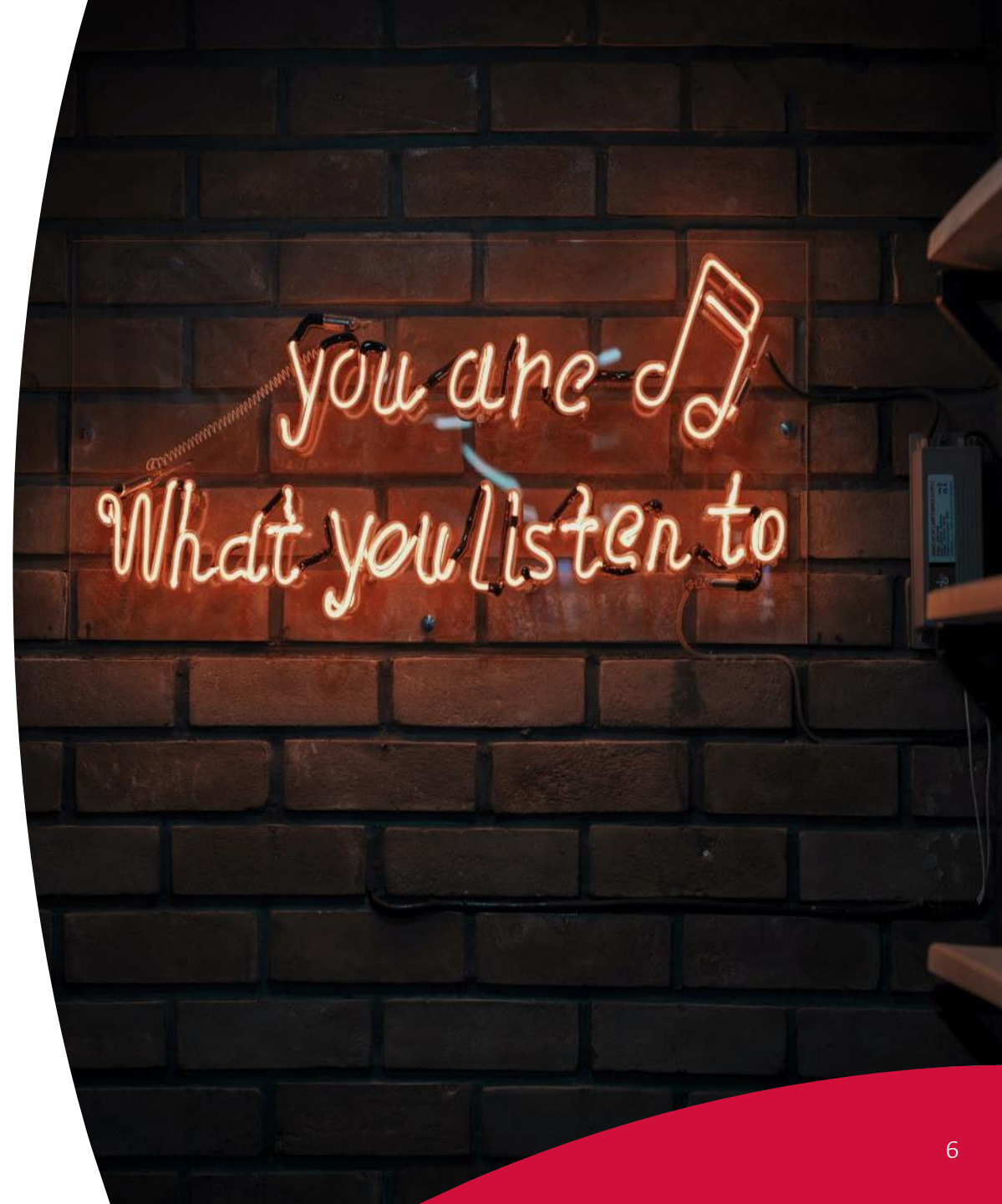


77% (2.78 million) adults in Ireland listen to Digital Audio - up from 71% in 2021.

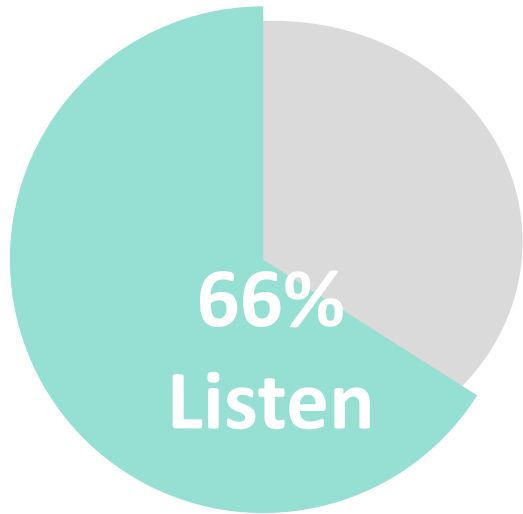
In 2022, 6 in 8 adults listen to digital audio in an average week



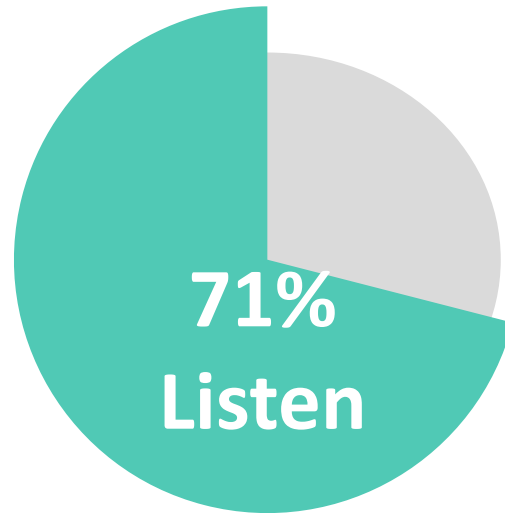
Corresponds to 2.78 million people aged 18+ in Ireland listening to digital audio in an average week



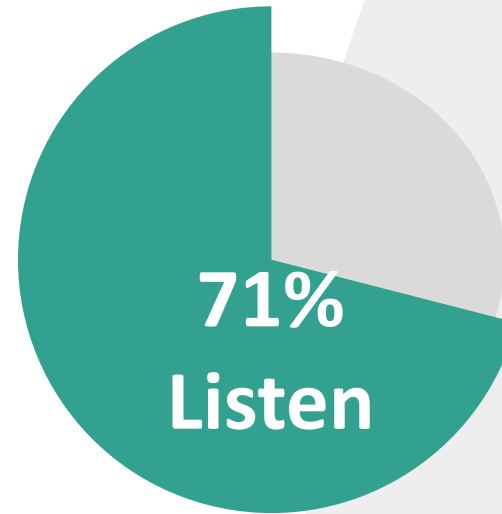
Digital audio consumption has increased vs last year, & is at its highest level since research began in 2019



2019



2020

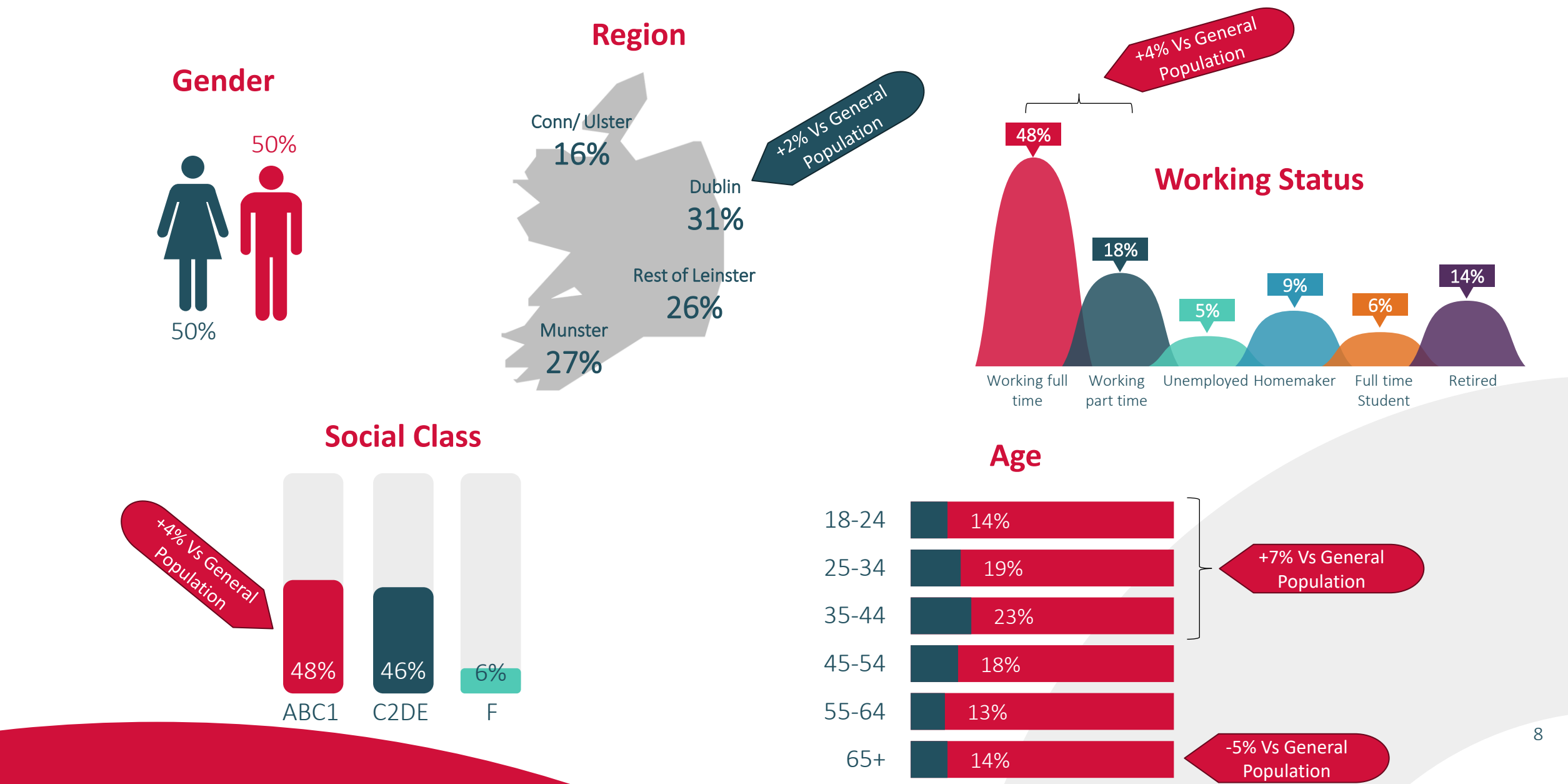


2021



2022

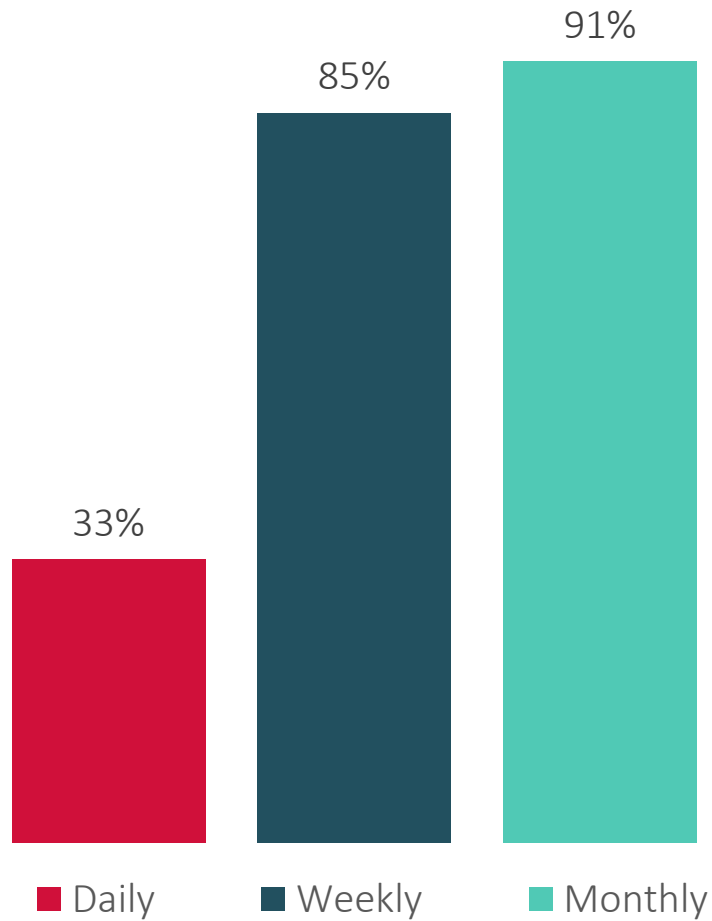
18-44 year olds & those working FT remain heavy users of digital audio C



Average weekly consumption of Digital Audio is 19.3 hours in 2022, up from 15.3 hours in 2021.

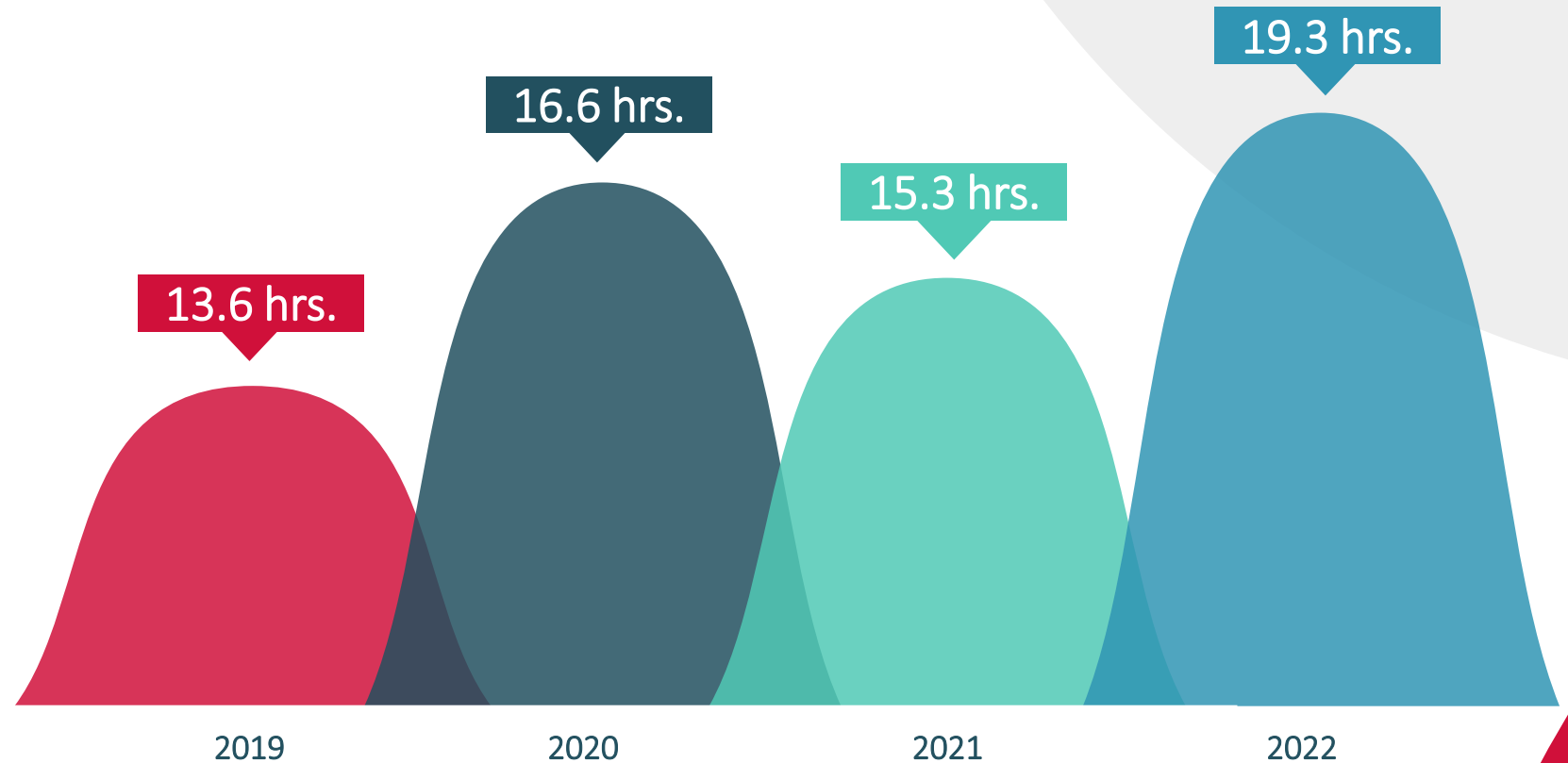
Frequency of listening to digital audio*

1 in 3 digital audio users listen to digital audio on a daily basis, with 9 in 10 reporting usage at least once a month.

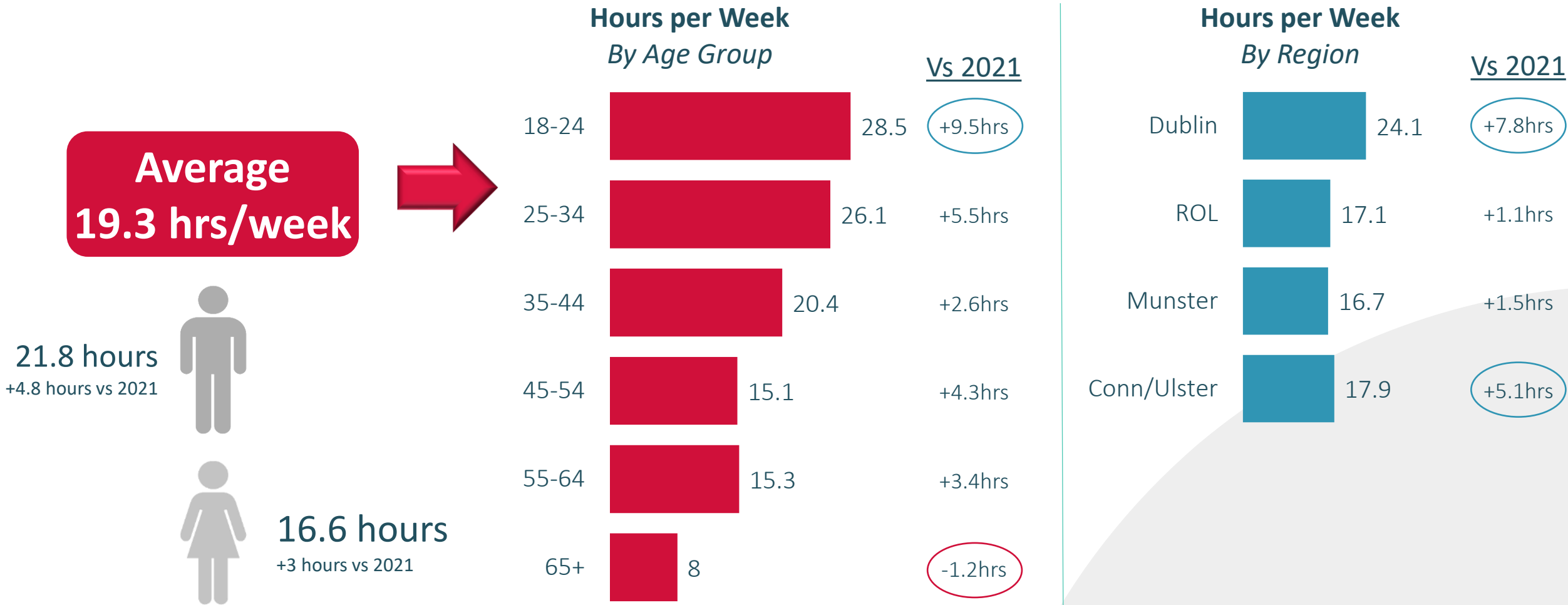


After a slight decline in hours of consumption in 2021, coinciding with the re-opening of society post pandemic, there is a notable increase in consumption of digital audio, now averaging over 19 hrs per week.

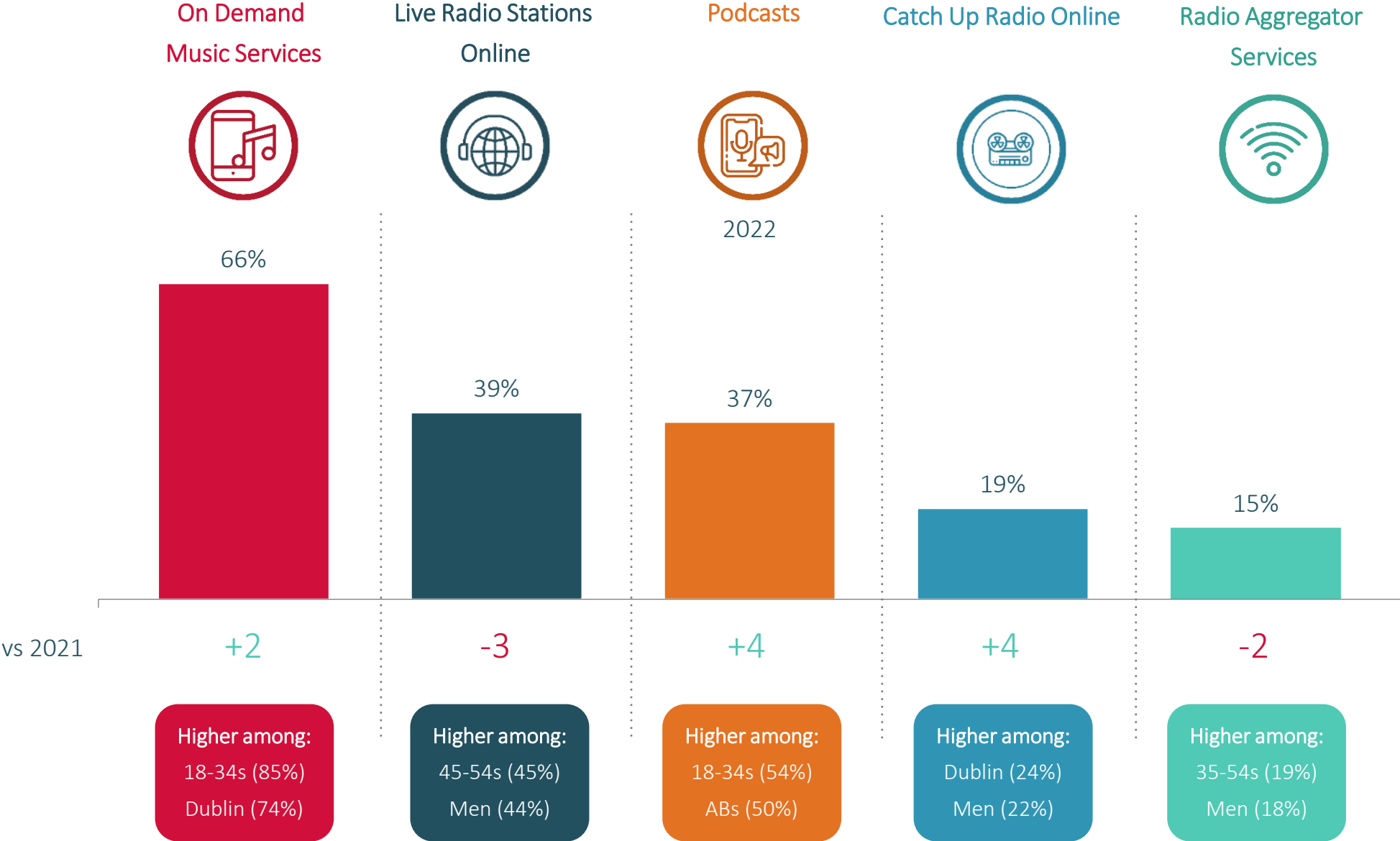
Average Weekly Consumption of Digital Audio is 19.3 Hours



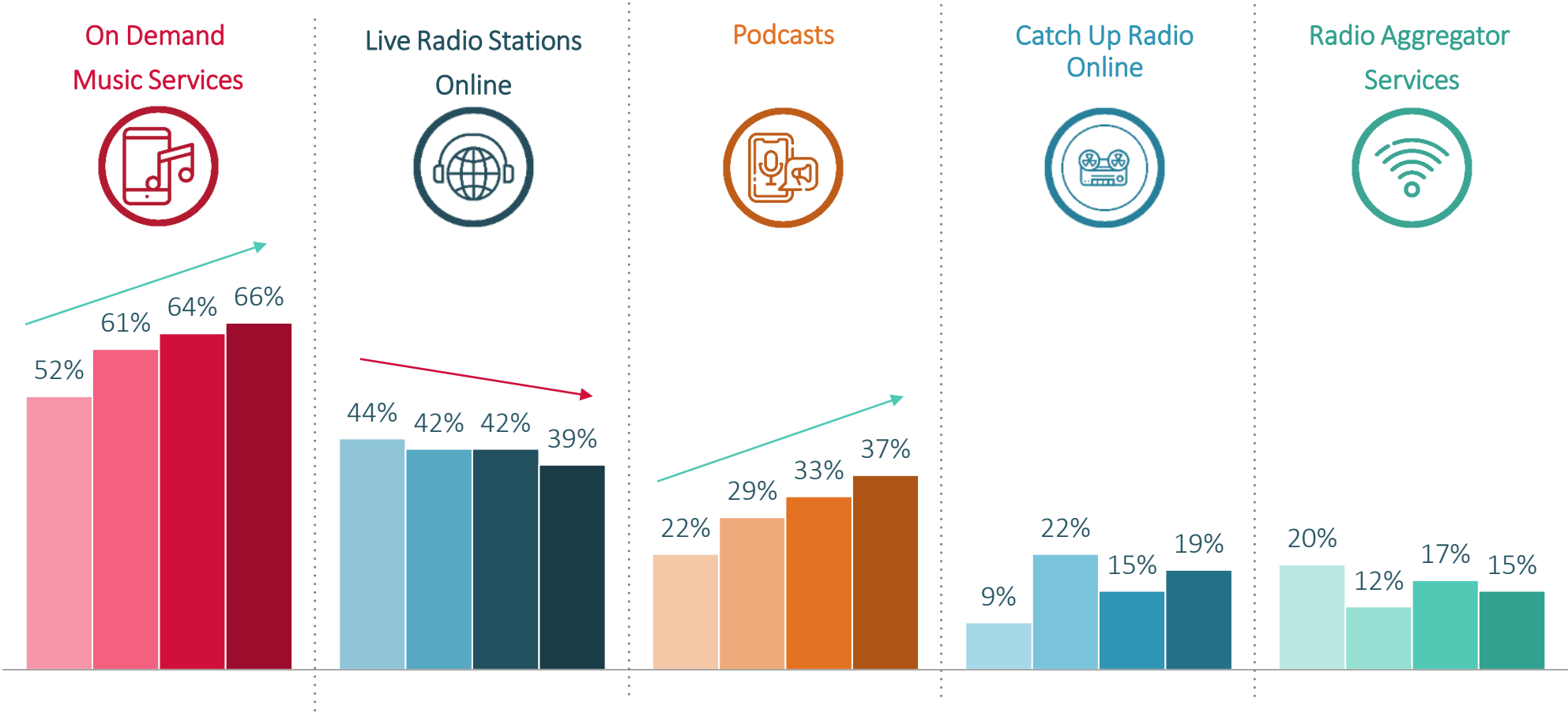
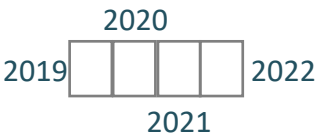
Men, younger age cohorts & Dublin residents over index on digital audio consumption – as well as driving the increase vs 2021



What do digital audio users listen to on a weekly basis?



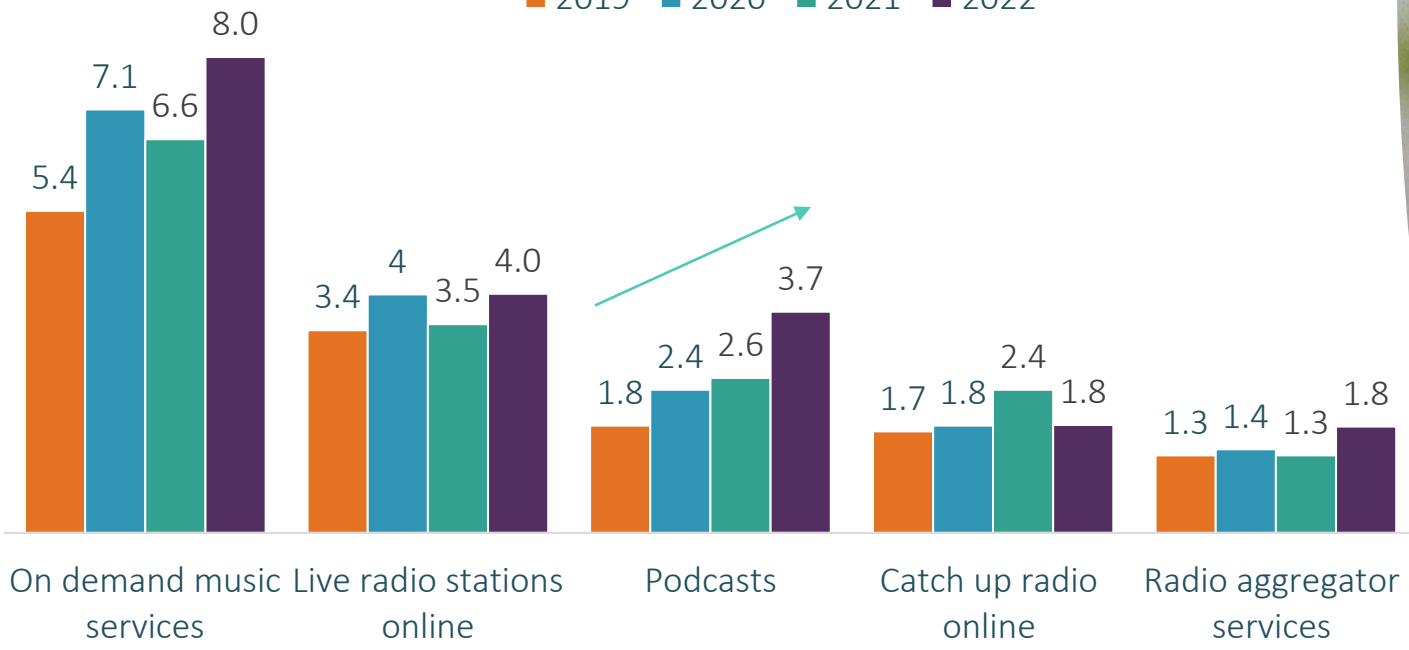
Weekly content consumed by digital audio users over time



Digital radio & on demand music continue to dominate, while podcasts maintain growing trend

Average
19.3 hrs/week

2019 2020 2021 2022



02

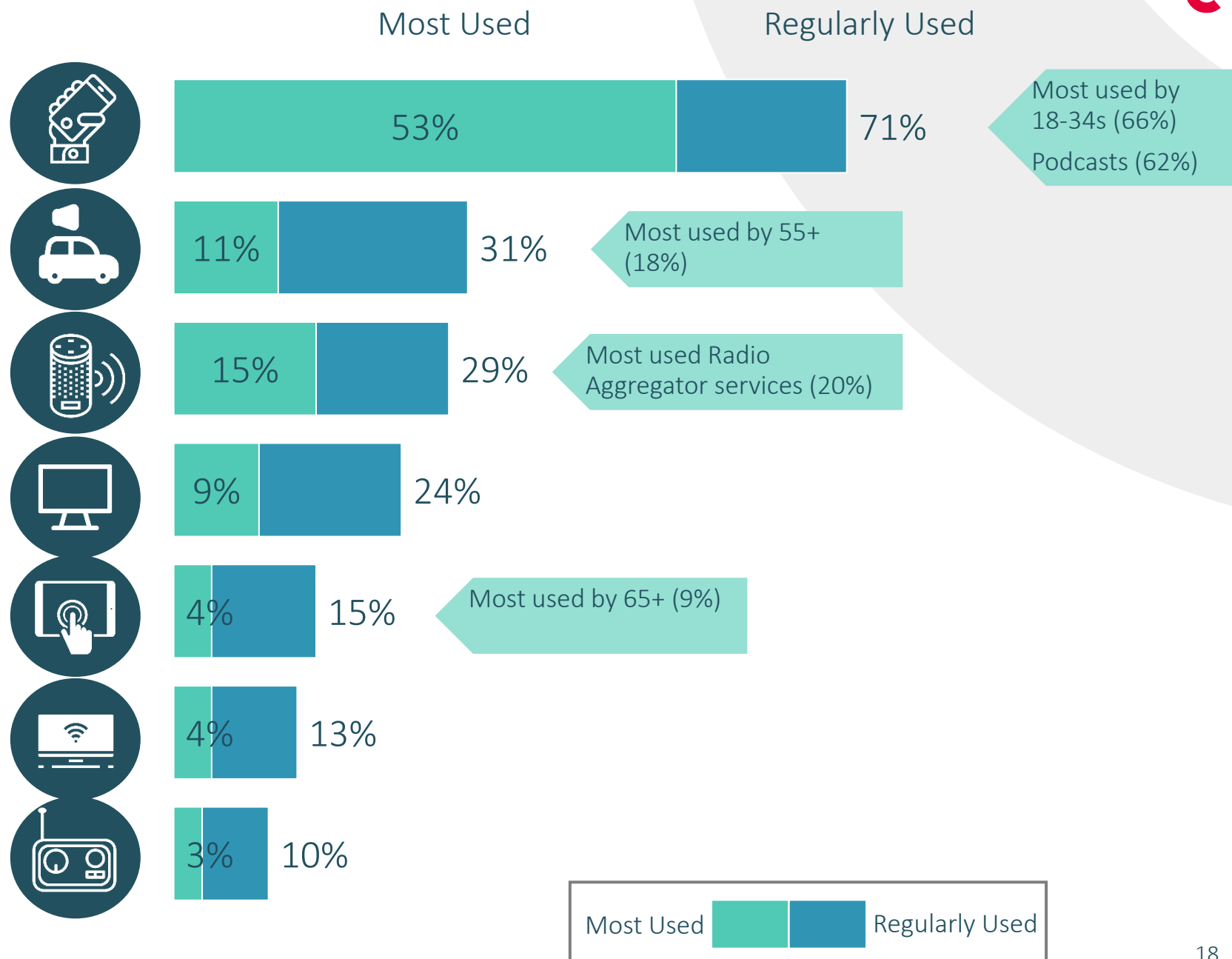
Digital Audio Behaviour



Smartphone remains the most frequently used device to engage with digital audio.

However, in 2022, we see an increase in proportion of those using connected car & smart speakers – now ranking higher than desktop/laptop.

Smartphone continues to dominate as the most used device. However, compared to 2021, connected car & smart speakers overtake desktop/laptop.

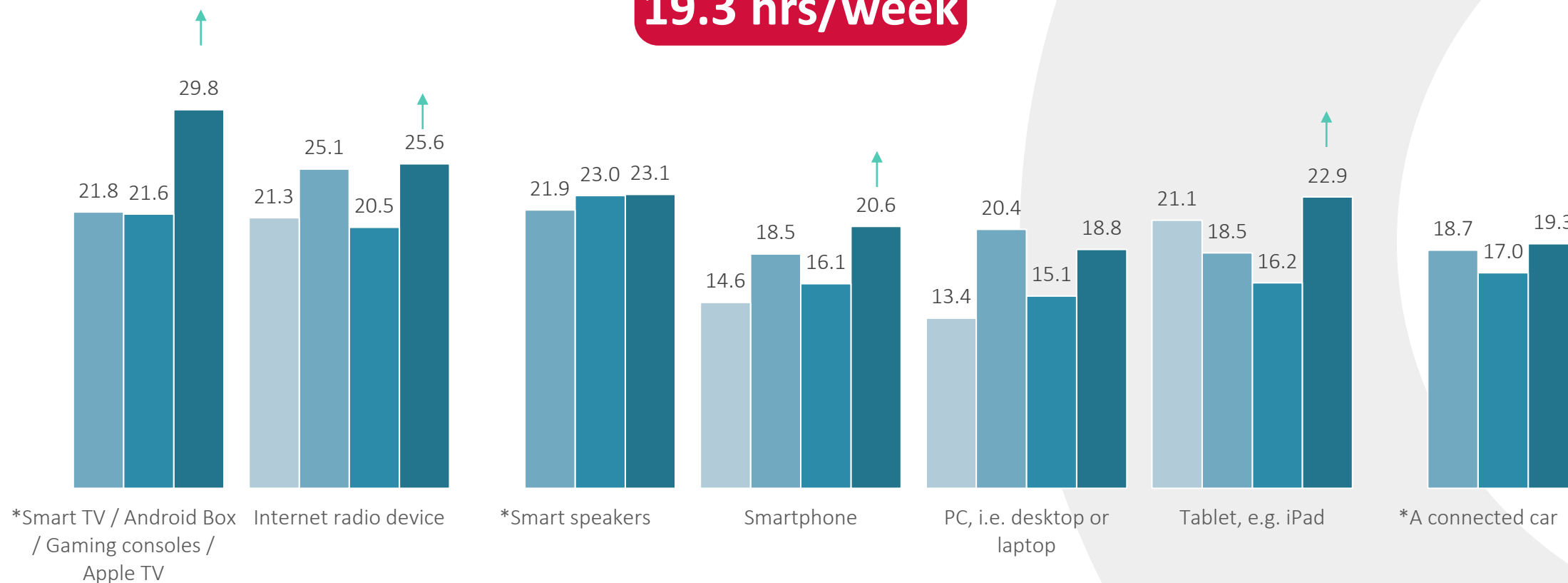
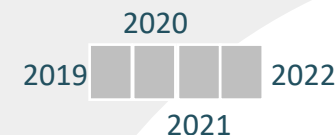


Entertainment, relaxation and having an accompaniment to daily tasks are the top 3 reasons why digital audio users engage with the medium.

Avg. hours a week spent listening to digital audio on smart TV, internet radio device, smartphone & tablet increase in 2022



**Average
19.3 hrs/week**

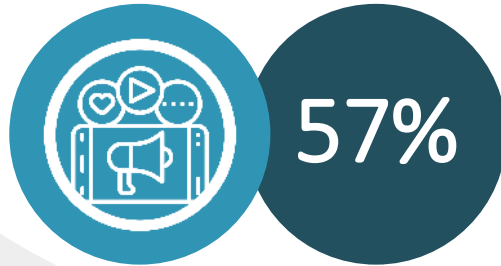


- Channel added in 2020
- NOTE: Data shown above is cross-tabulated responses to two separate questions (channel used & average number of hours of weekly consumption) and as such is indicative.

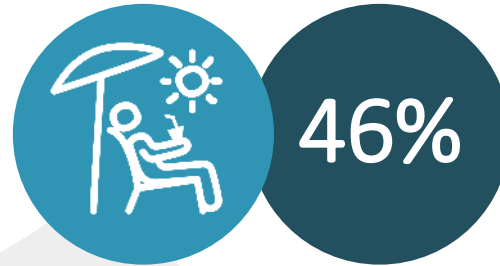
Entertainment, relaxation and having an accompaniment to daily tasks are the top 3 reasons why digital audio users engage with the medium



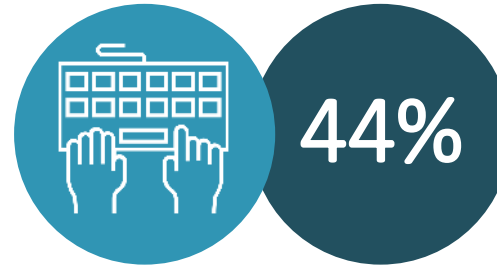
To be entertained



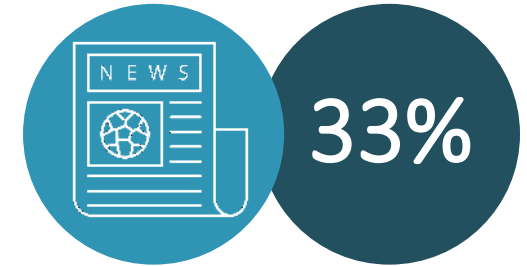
To relax



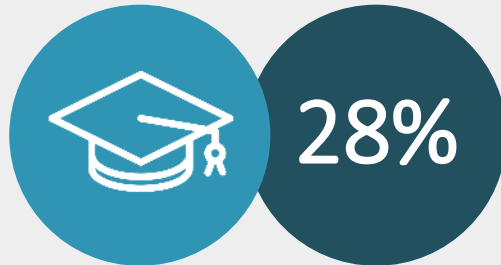
To have something as accompaniment to my other daily experiences



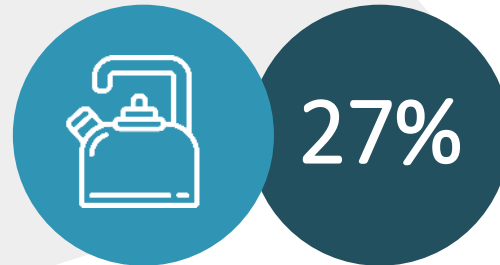
To keep up to date/catch up on current affairs



To learn something new



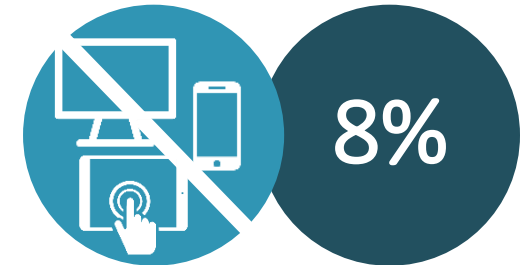
To fill up time/occupy myself



To follow particular series/presenters/content



To cut down on screen time



03

Looking Towards the Future

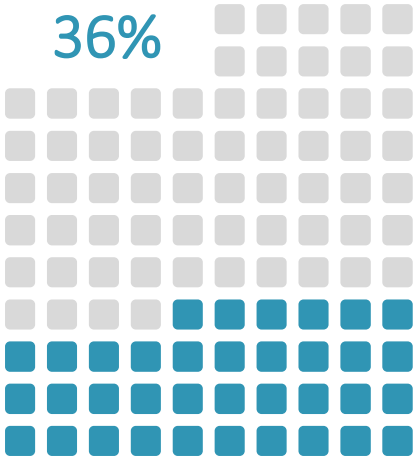


Approx. 3 in 10 expect to increase their engagement with digital audio & podcasts.

2 in 5 say they are open to discovering new podcasts.

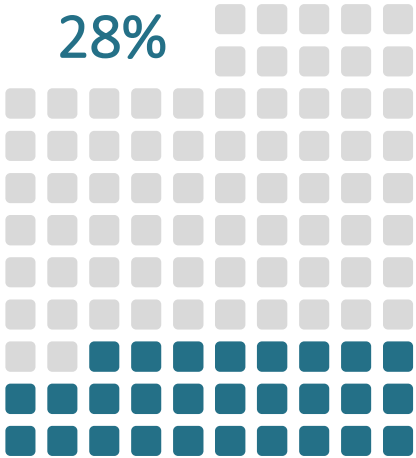
Over a third say they listen to more digital audio now vs 2021

I listen to online radio or music more now than a year ago
(among digital audio users)



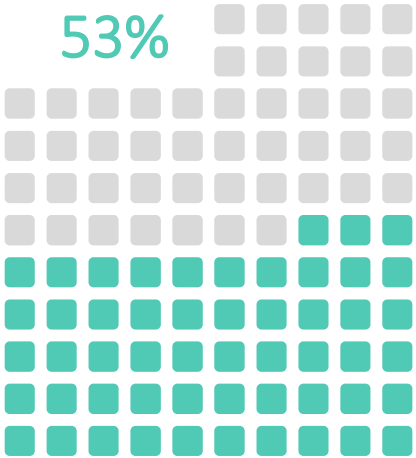
Higher among:
Dublin (40%), 25-34s (34%)

I expect to increase my listening to online radio and music in the next 12 months



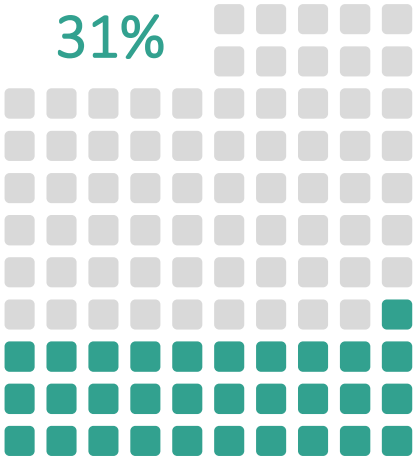
Higher among:
C2s (33%), 25-34s (32%)

I listen to online podcasts more now than a year ago
(among podcast users)



Higher among:
35-44s (63%), women (59%)

I expect to increase my listening to online podcasts in the next 12 months



Higher among:
18-24s (48%)

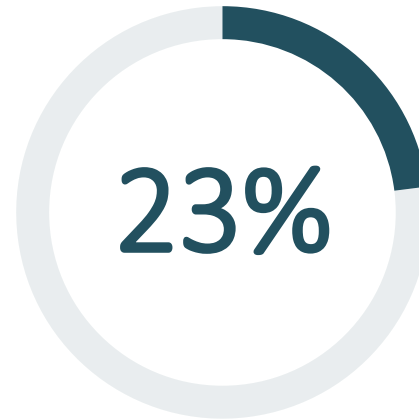
Digital audio users say that because of listening more to digital audio...

...I listen less to
traditional radio FM
broadcasting now
compared to a year ago



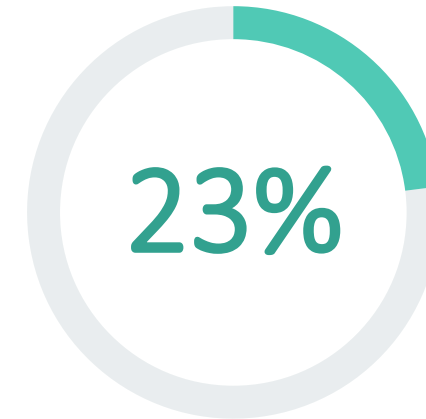
Higher among
18-34s (45%), 35-44s (41%)

...I watch less TV /
Online Video now
compared to a year ago



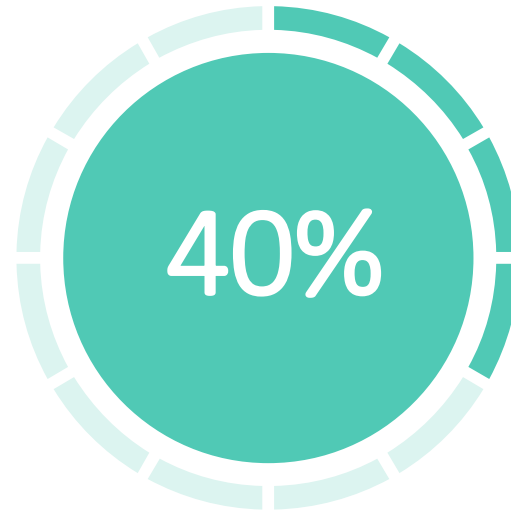
Higher among
25-34s (30%) & 35-44s (29%)

I have less screen time
now compared to a
year ago



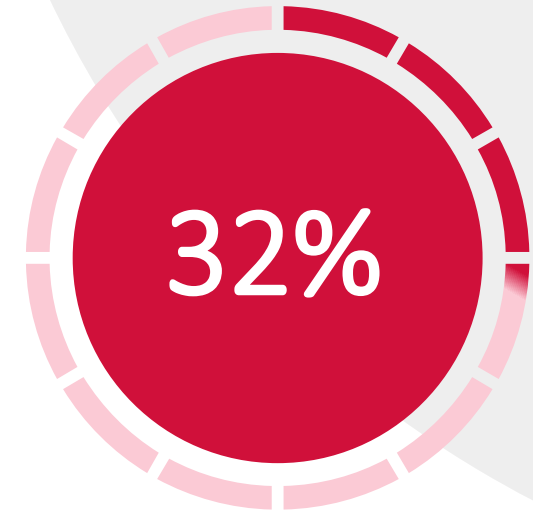
Higher among
18-34s (30%)

4-in-10 say digital audio has introduced them to new content and approx. a third are happy to listen to ads in return for free content.



Online radio, music or podcasts have introduced me to new content I had not previously used or been aware of

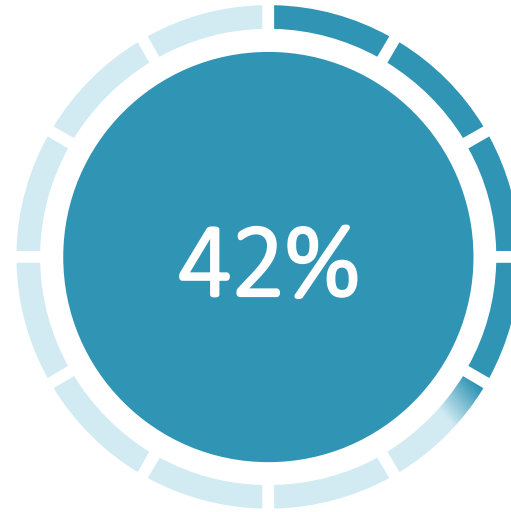
Higher among:
18-34s (47%), Dublin residents (45%) AB social class (45%)



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

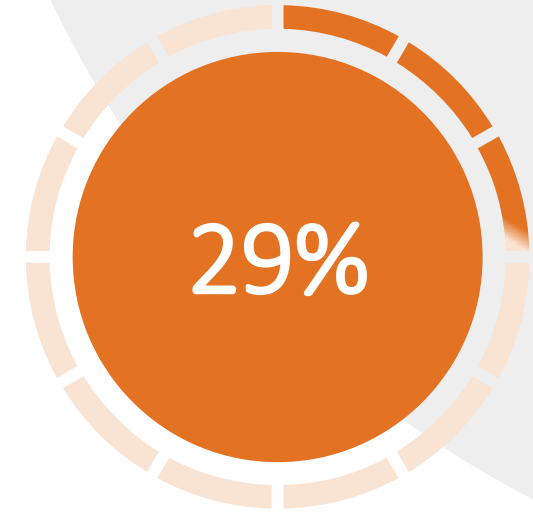
Higher among:
Munster residents (40%)

42% say they are open to discovering new podcasts while 3-in-10 say they have a plethora of podcasts they listen to regularly.



I'm always open to discovering and engaging with new podcast series

Higher among:
35-44s (52%) & 18-34s (51%)



I have a wide variety of podcasts that I dip in and out of regularly

Higher among:
18-34s (40%) & 35-44s (35%)

04

Key Findings



Key Findings



Growth in digital audio consumption

Digital audio consumption has grown vs 2021, with 77% of adults in Ireland consuming digital audio – highest level since 2019. Demographic profile of digital audio users remains the same, with younger cohorts, those working full time and ABC1s over-indexing.



Increase in number of hours spent listening to digital audio

While frequency of consumption (daily/weekly/monthly) follows a similar pattern to the previous year, there is a welcome bounce back in the number of hours spent listening to digital audio (average weekly consumption 19.3hrs). On demand music and online radio continue to dominate here, however, podcasts record a wave on wave increase.



Some changes in listening behaviour

While smartphone continues to dominate as the most used device, compared to 2021, connected car & smart speakers overtake desktop/laptop.

Entertainment, relaxation and having an accompaniment to daily tasks are the top 3 reasons why digital audio users engage with the medium.

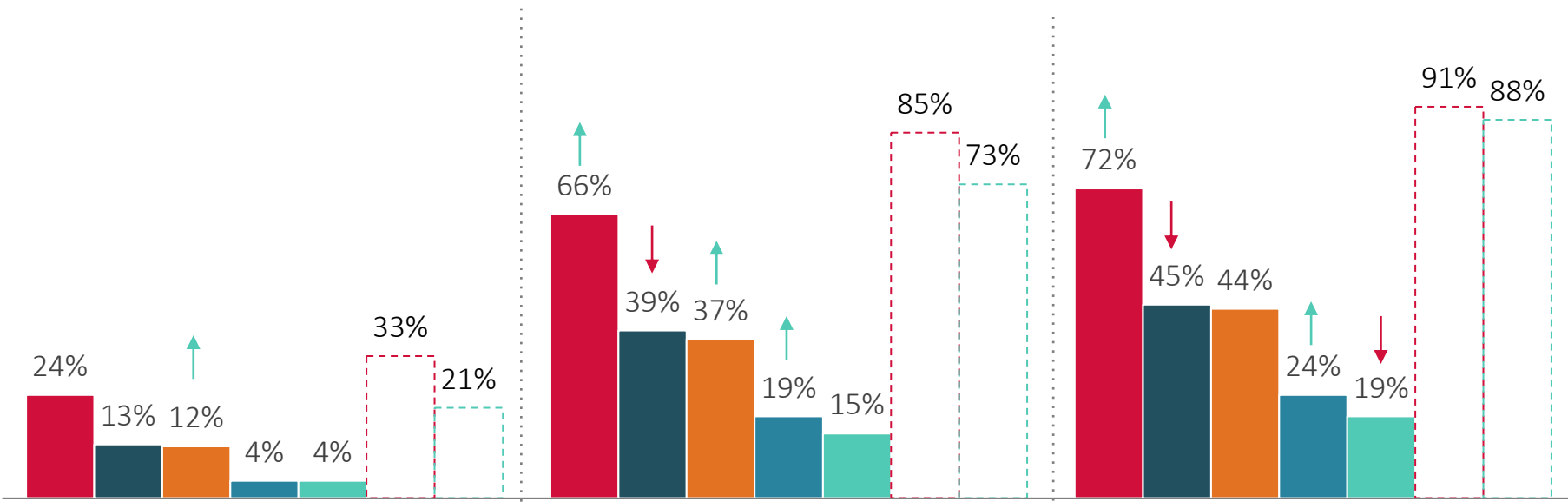
05

Appendix



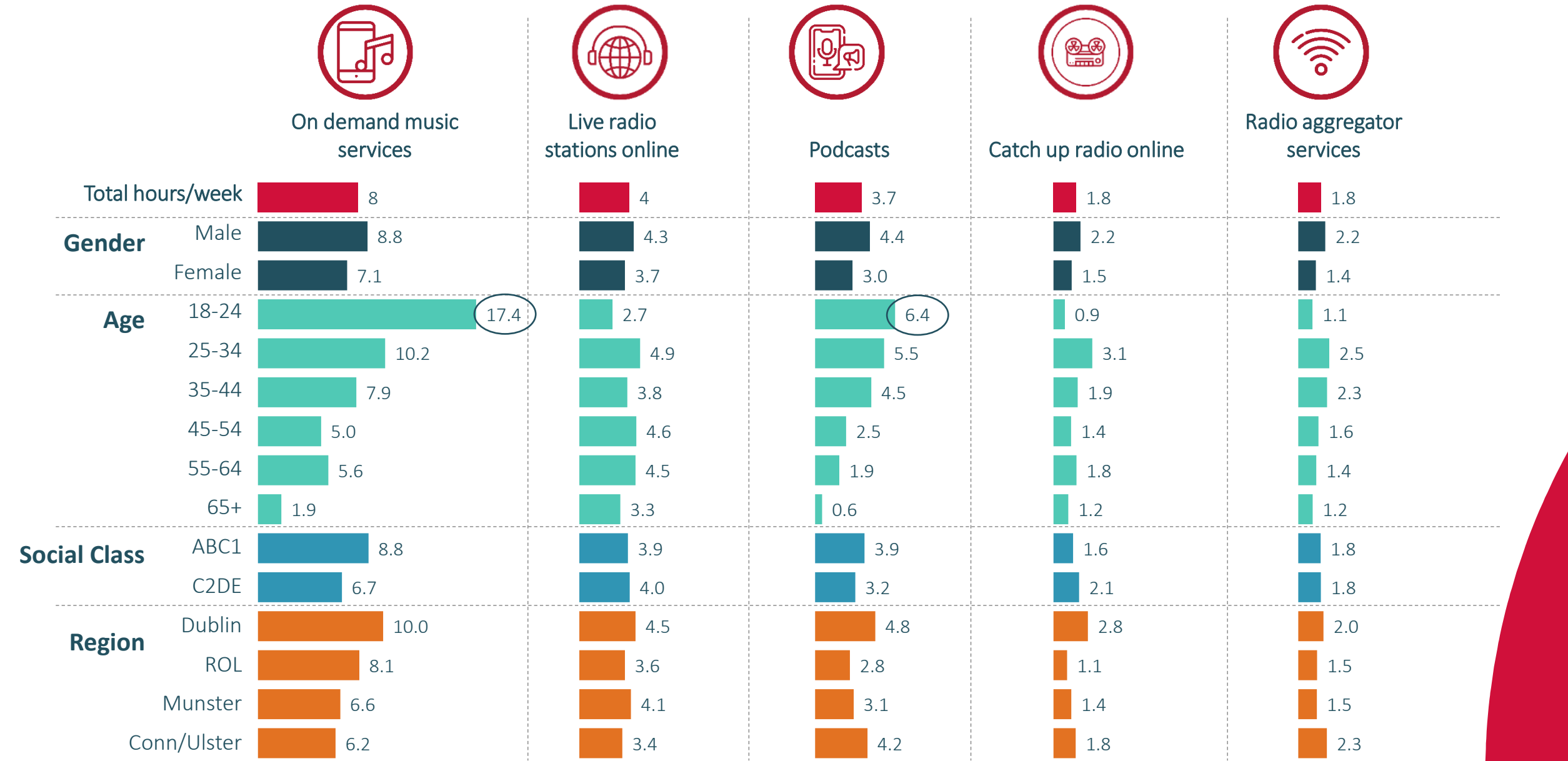
Daily consumption patterns remain relatively similar over time, with the exception of Podcasts which record an increase vs 2021, across consumption frequencies

■ On demand music services
 ■ Live radio stations online
 ■ Podcasts
 ■ Catch up radio online
■ Radio aggregator services
 □ Net: any channel
 □ Net: radio online

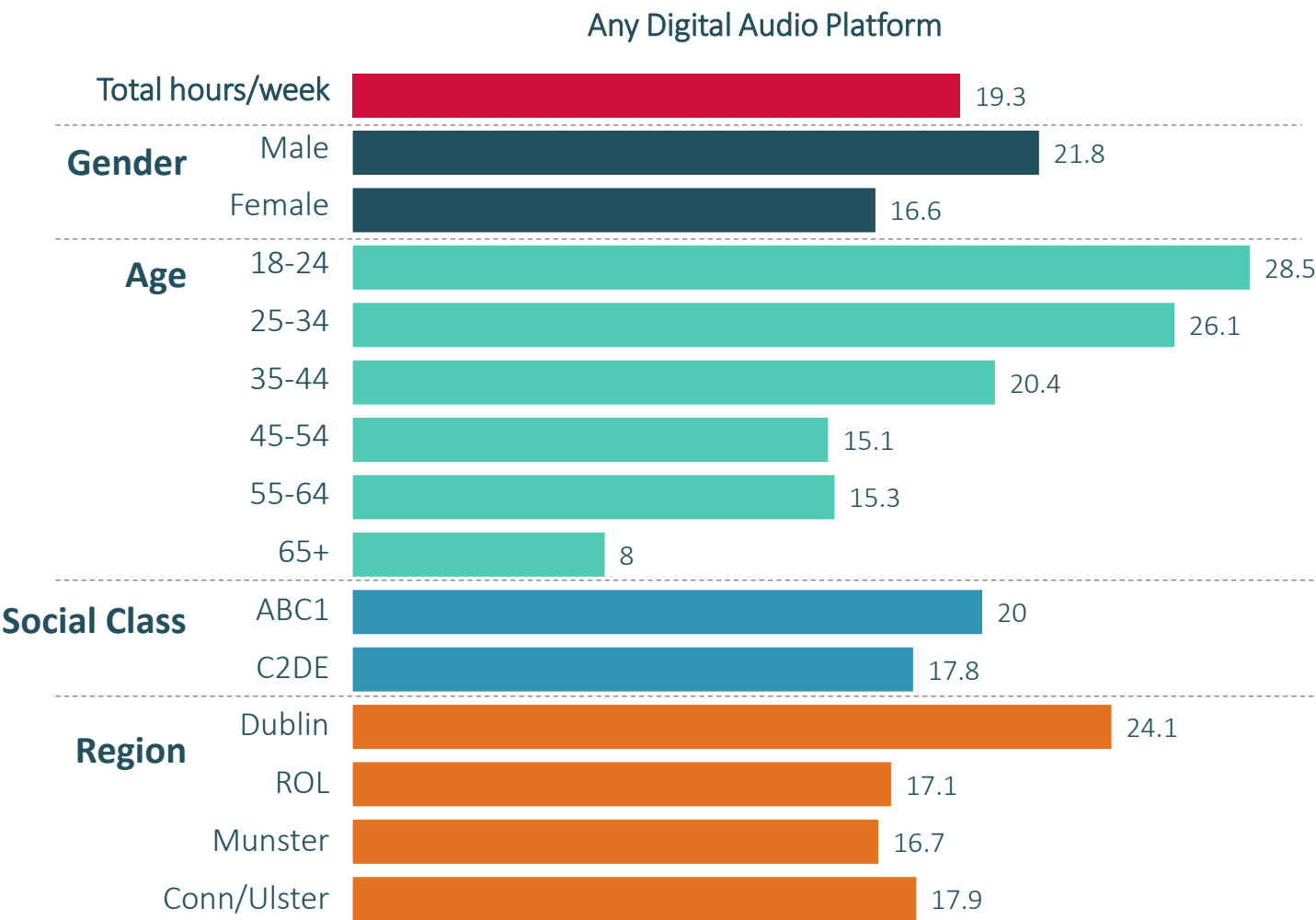


	Daily							Weekly							Monthly						
2021	24%	14%	9%	5%	4%	33%	23%	64%	42%	33%	15%	17%	85%	74%	68%	48%	42%	19%	22%	91%	89%
2020	22%	13%	9%	5%	4%	31%	22%	61%	42%	29%	22%	12%	82%	76%	67%	50%	36%	30%	16%	88%	96%
2019	24%	13%	6%	5%	3%		21%	52%	44%	22%	9%	20%		73%	59%	48%	27%	27%	14%		89%

Breakdown of hours of consumption by key demographic factors



Listening to digital audio within the last week



Purpose for consumption by key demographic factors



To be entertained



To relax



To have something as accompaniment to my other daily experiences



To keep up to date/catch up on current affairs



To learn something new



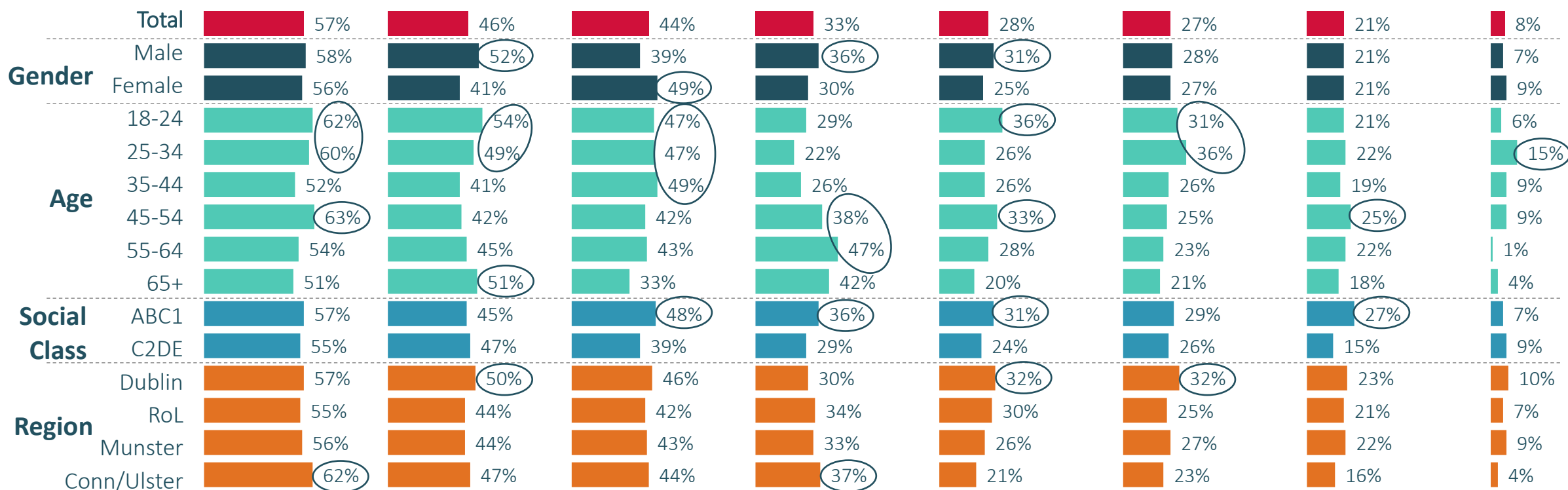
To fill up time/occupy myself



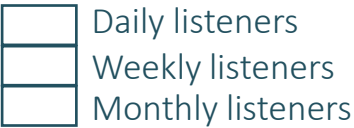
To follow particular series/ presenters/ content



To cut down on screen time



Statements on listening to digital audio by frequency of listening

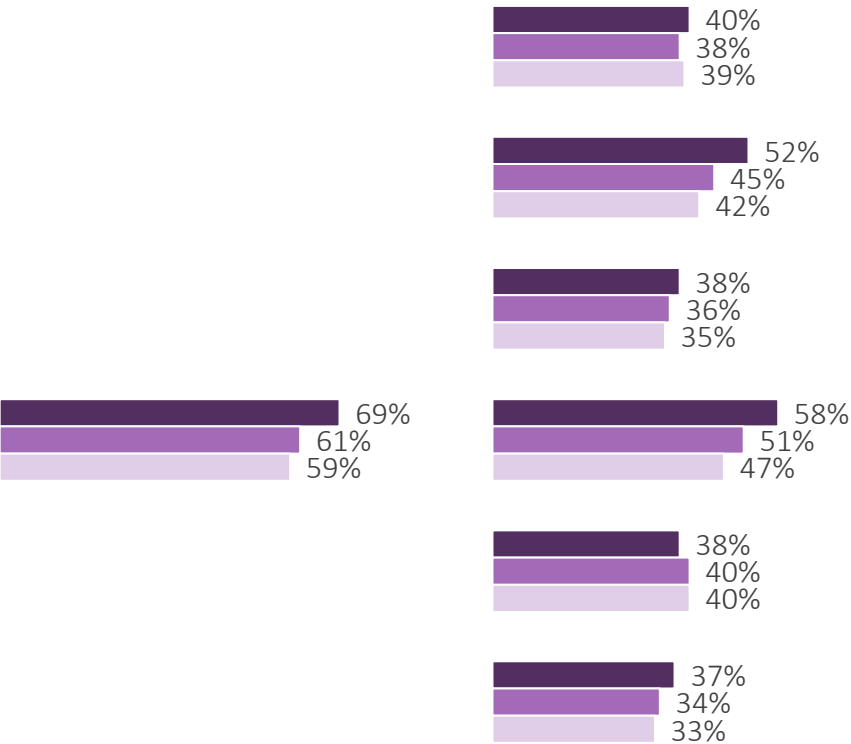
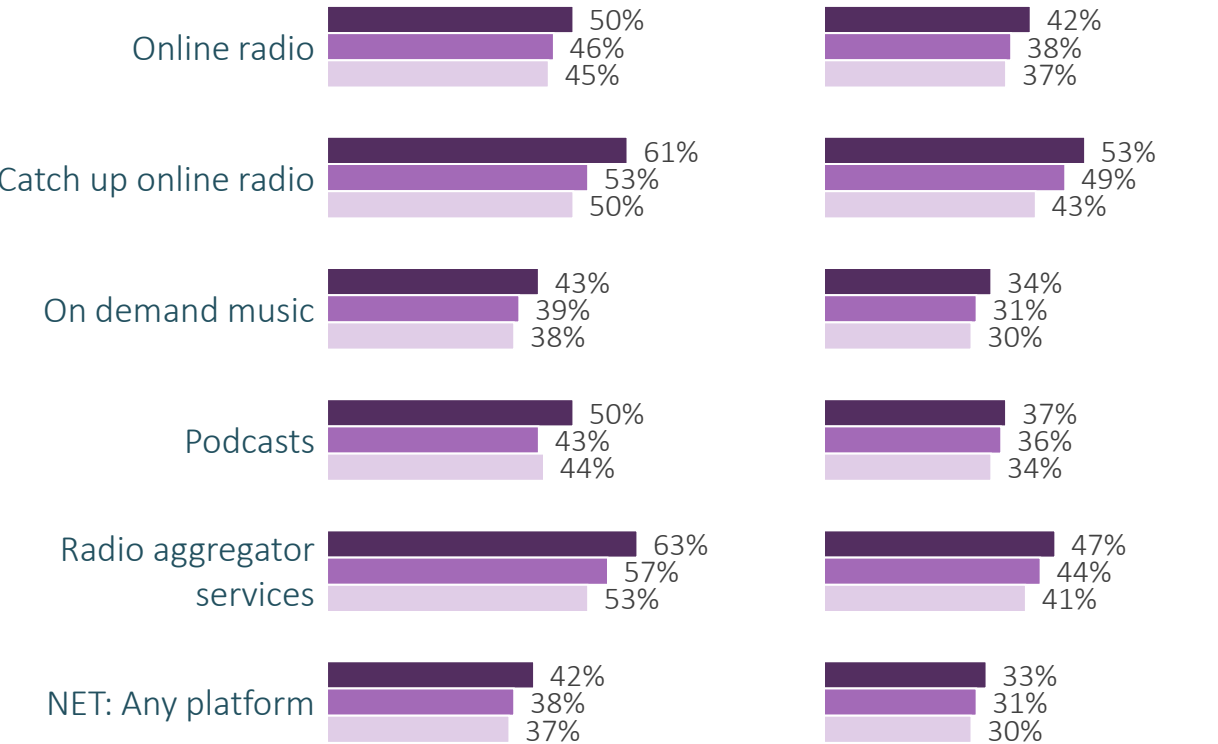


I listen to online radio or music more now than a year ago
(among digital audio users)

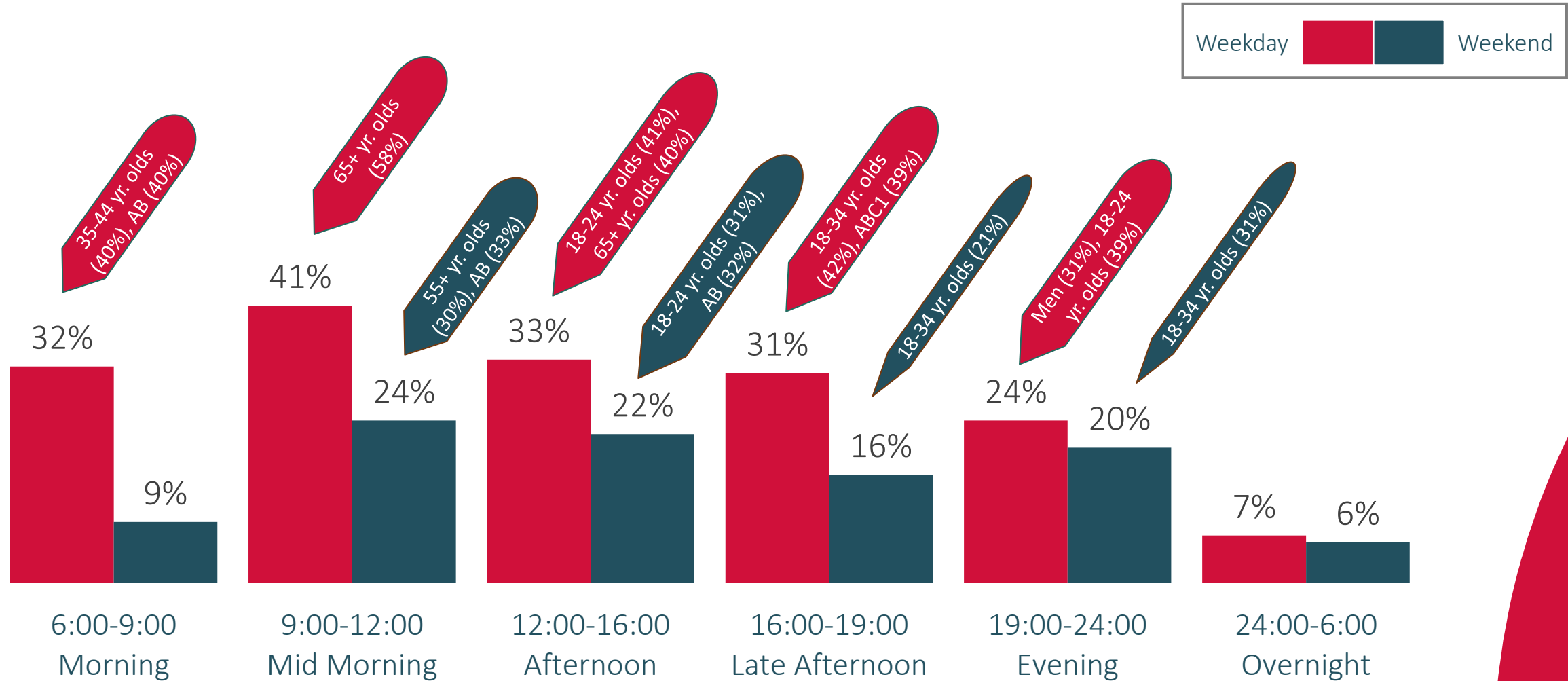
I expect to increase my listening to online radio and music in the next 12 months

I listen to online podcasts more now than a year ago
(among podcast users)

I expect to increase my listening to online podcasts in the next 12 months



In 2021, digital audio listenership peaks in mid-mornings on weekdays but is relatively steady through the day on weekends



• NOTE: this question was removed from questionnaire in 2022. This slide has been taken from the 2021 report for reference.

RESEARCH EVALUATION DIRECTION **CLARITY**

See More, Clearly

REDC

