

# **SOUND AFFECTS: AUDIO REVIVAL**



**urbanmedia**  
onair online onstreet

**dentsu**

IN ASSOCIATION WITH

**M//** MARKETING  
INSTITUTE  
IRELAND

# Agenda

Event introduction	David Field	11.00am – 11.10am
Sounds Affects 2 introduction	Brian McCarthy	11.10am – 11.20am
The research insights	Dael Wood & Claire O'Rourke	11.20am – 11.50am
Panel discussion	Brian McCarthy, Mike Cass, Emma Nolan, Jennifer Fitzsimons	11.50am – 12.15pm
Q&A	All	12.15pm – 12.30pm

Welcome



**David Field**

Chief Executive  
Marketing Institute of Ireland

# Sounds Affects 2 Introduction

**Brian McCarthy**

Sales Director  
urbanmedia





Before we look forward let's take  
a trip down memory lane....



# The 3 Key Takeaways from Sound Affects 1



1.

CONTROL  
HAS SHIFTED

2.

AUDIO IS  
MULTIFARIOUS

3.

CONNECTING WITH  
RELEVANCE





Engage & Inform

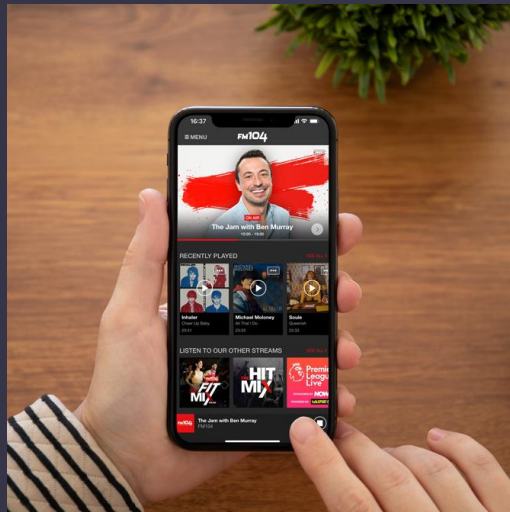
Entertain

Reassure

Audio has played an increasingly important role in peoples lives throughout the pandemic



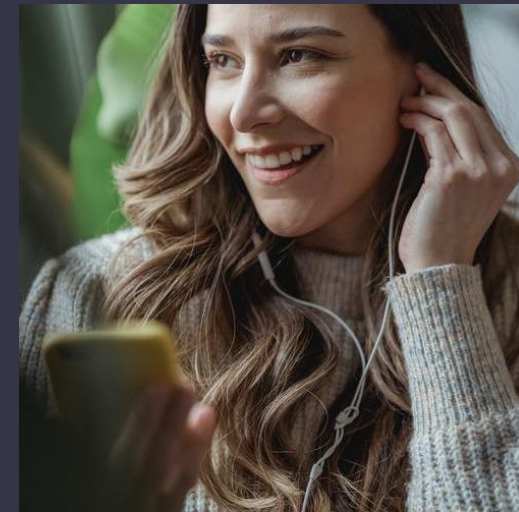
# There's a convergence of the 3 key elements



Great Content



Technology



Consumer Demand



We are in  
the middle of the  
great audio revival

## The Research Insights



**Dael Wood**

Strategic Consulting Director  
Dentsu

**Claire O'Rourke**

Senior Research Lead  
Dentsu



1 METHODOLOGY

2 SIX THEMES

3 LISTENING SEGMENTS



Listening  
behaviour diary



National in-depth behaviour  
and usage survey



April – June 2021

# Core themes



Radio is king



The power of choice



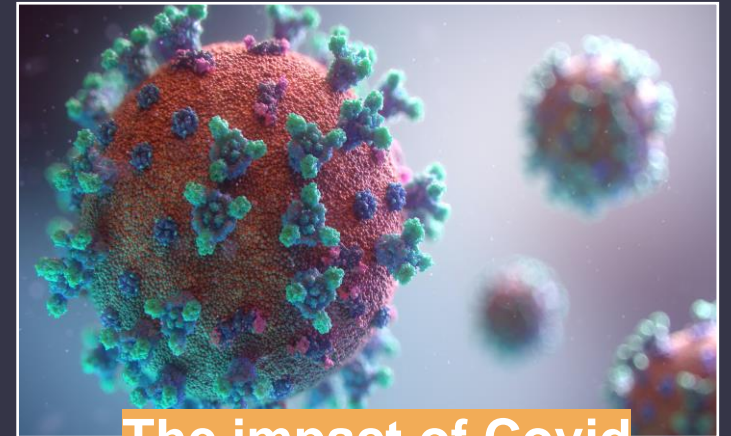
The podcast generation



Context and content

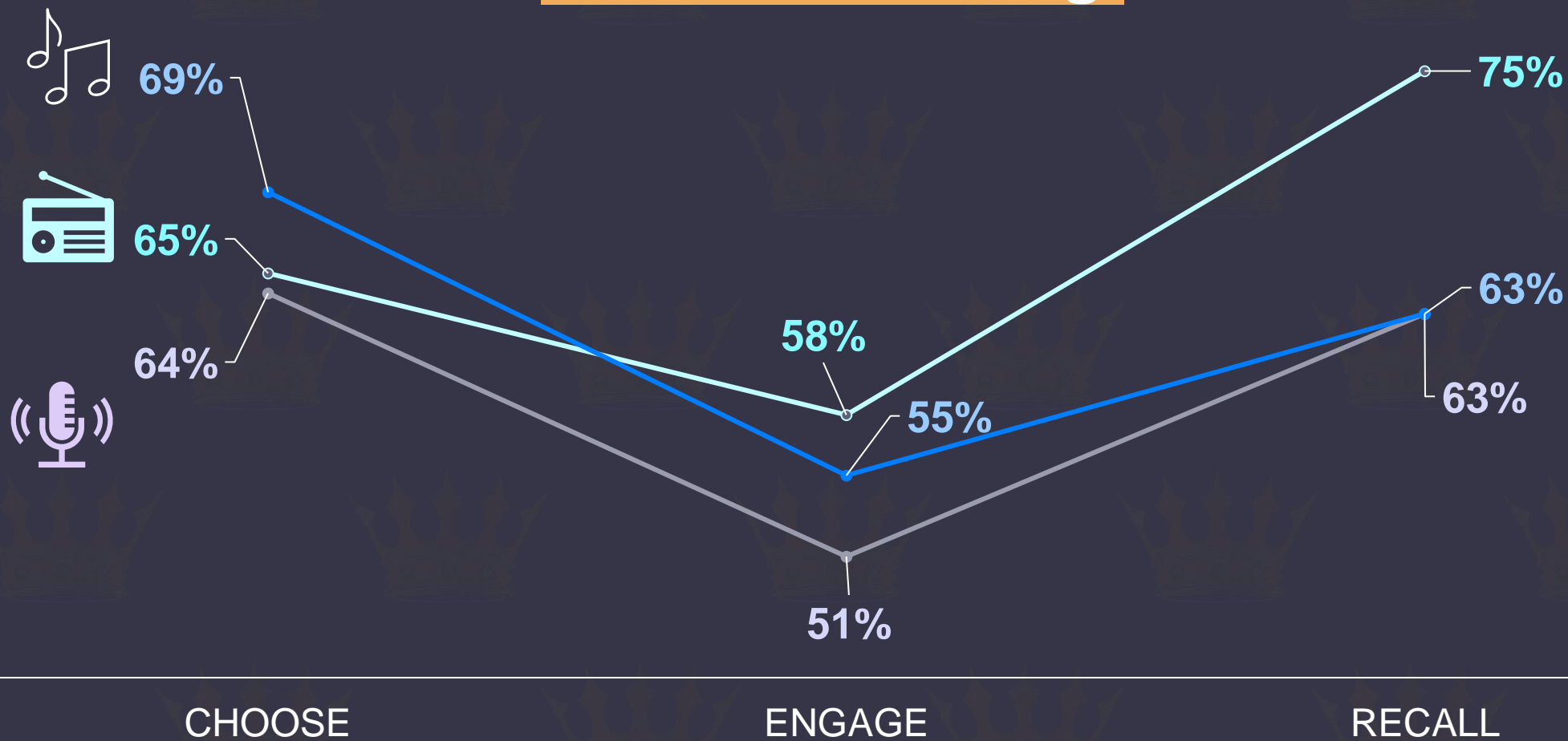


Trust is critical



The impact of Covid

# Radio is still king!



# People have ties to the radio they listen to



I would be sad if a radio presenter left the show I listen to

49%

I would start listening to a new radio station if a presenter I like moved to that station

46%

I feel like the radio presenters I listen to are friends

32%



60% agree that Radio is a trusted source of information about COVID-19

Breaking News!


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Ut diam ornare urna mattis. Nam imperdiet volutpat sapien, placerat sellus a sapien turpis.





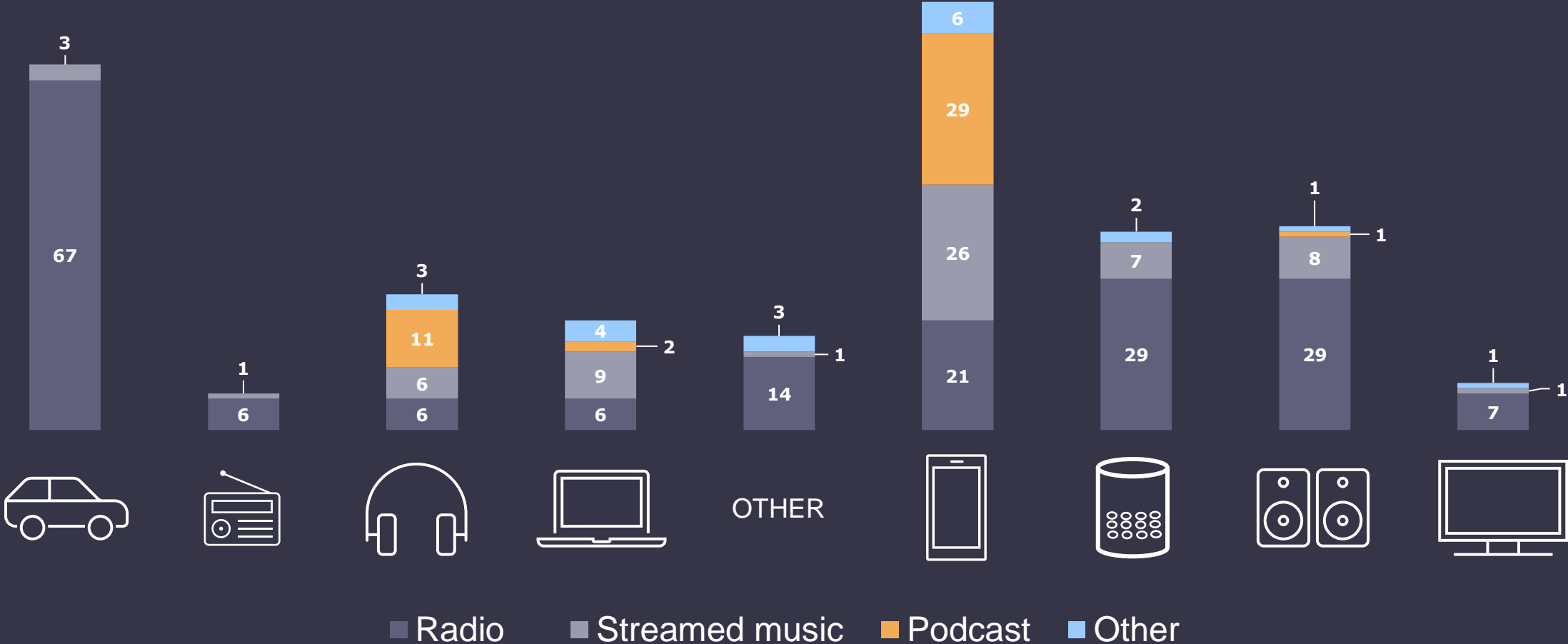
Overall, more adults say they listen to music on the radio than streamed music



**The Power of Choice**

# Across device and content listeners have at least 36 different combinations of choice

DIARY STUDY X INCIDENCE OF USAGE X DEVISE



69% of radio listeners, listen to the radio in their car

28% of podcast listeners, listen to podcasts in their car

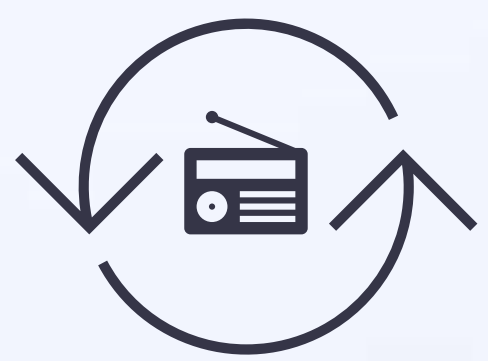
59% of music listeners, listen to music in their car



Different dayparts suit  
different content





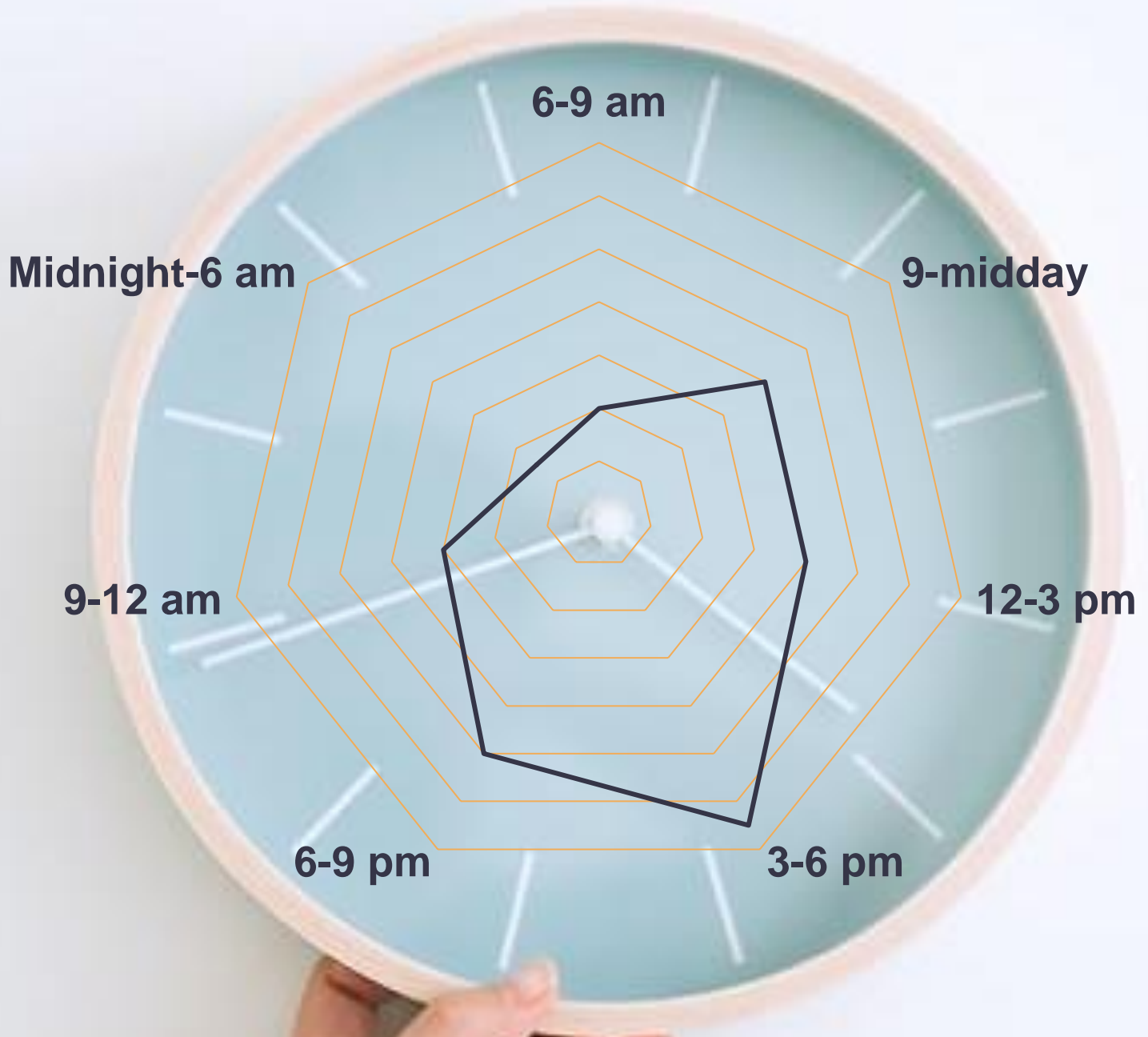






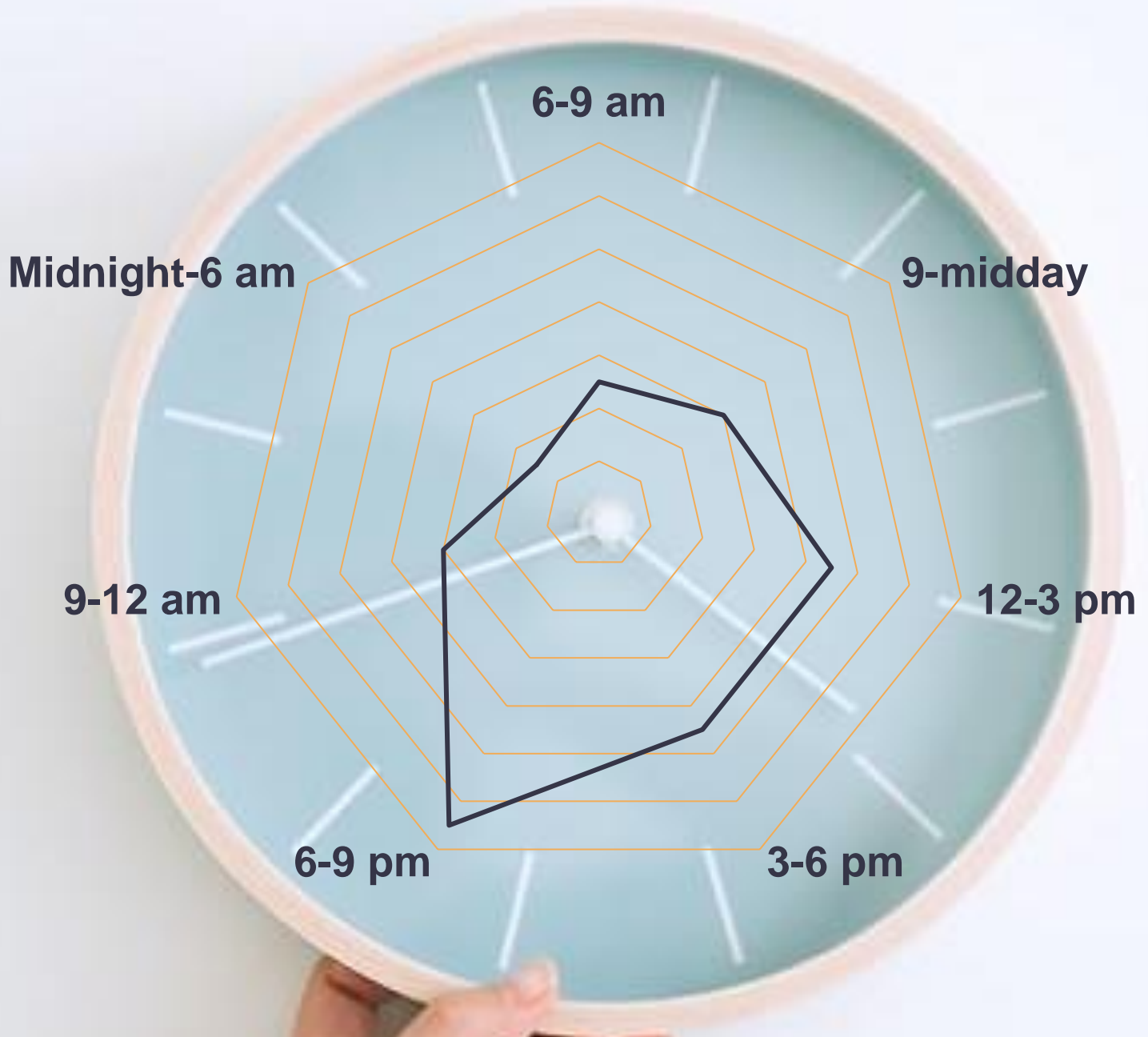
FREE





PAID







# 64%

listen to catch up radio



# The Podcast Generation



Podcast listenership x weekly

41%

all adults



67%

18-34



56%

18-34 Most likely to listen  
to comedy podcasts  
(38% all adults)



More likely to listen while...

Working/Studying

**49%**

Walking

**47%**

Exercising

**46%**



54%

of 18-34 year olds agree that their  
**favourite podcaster feels like a friend**  
(vs 29% of all adults)



A close-up photograph of a person's hands using a laptop and a smartphone. The person is wearing a white shirt and a dark jacket. The laptop is silver and the smartphone is black. The background is blurred, showing a desk and a chair.

38%

of 18-34 year olds **subscribe to a podcast**  
(vs 21% of all adults)

29%

of 18-34 year olds pay money to a podcasters Patreon  
(vs 12% of all adults)



**Patreon**  
Patreon

GET

4.8 ★★★★★  
2.1K Ratings

No. 169  
Entertainment

12+  
Age

Connecting creators and  
fans like never before

Build a long-term relationship  
with your fans with

Patreon

9:41 AM

# Context and content:

A clear role for channels

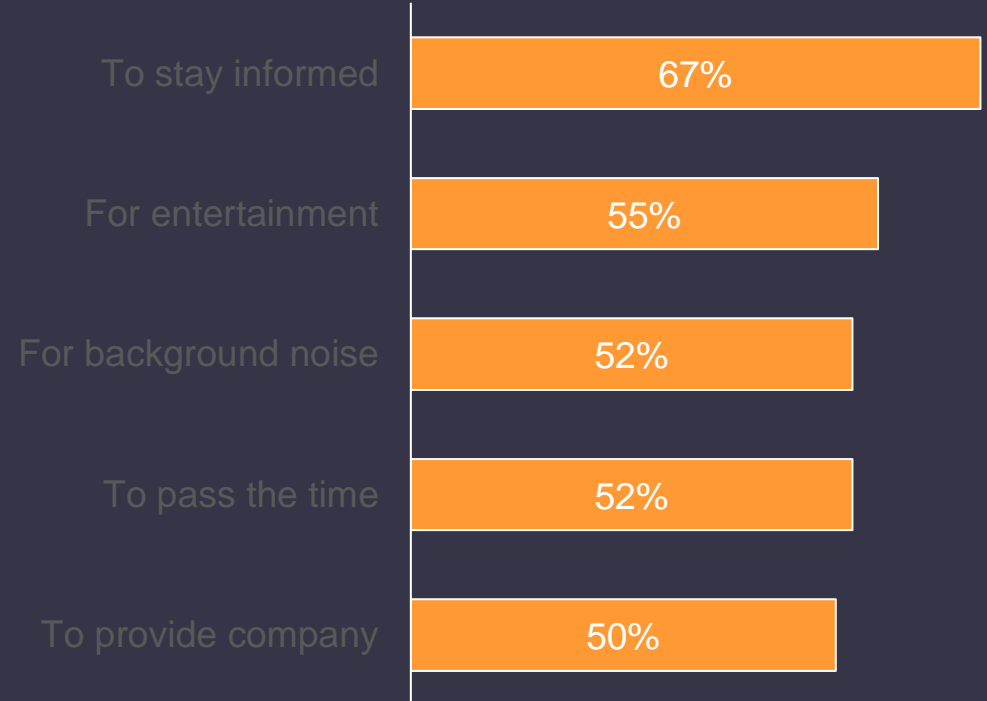




# Radio – Information



## Top 5 reasons to listen



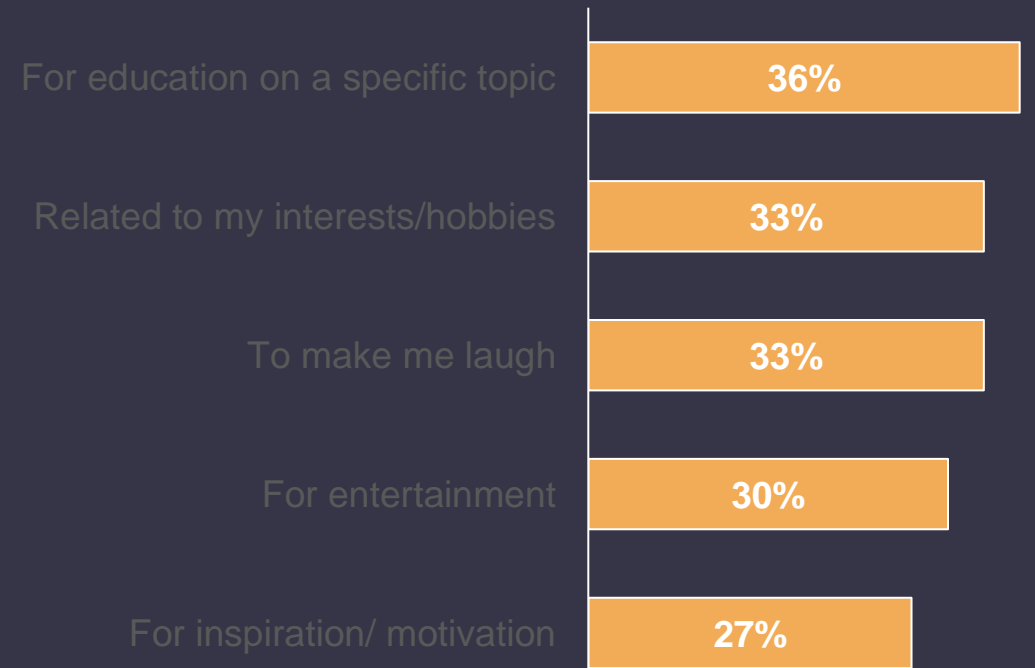
# People are most likely to listen to the radio while driving or commuting



# Podcast – Education and entertainment



## Top 5 reasons to listen

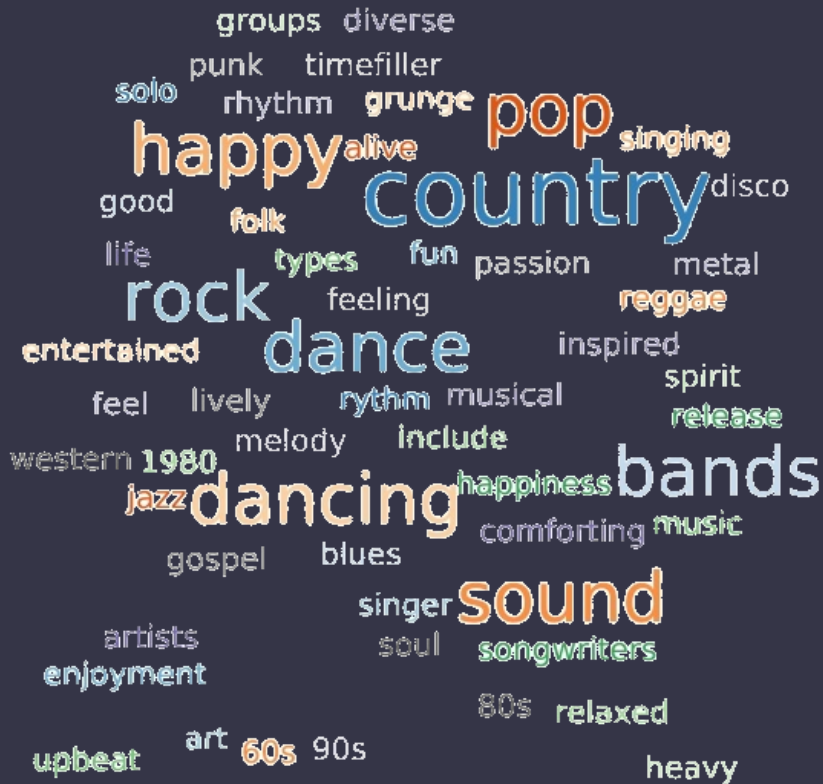




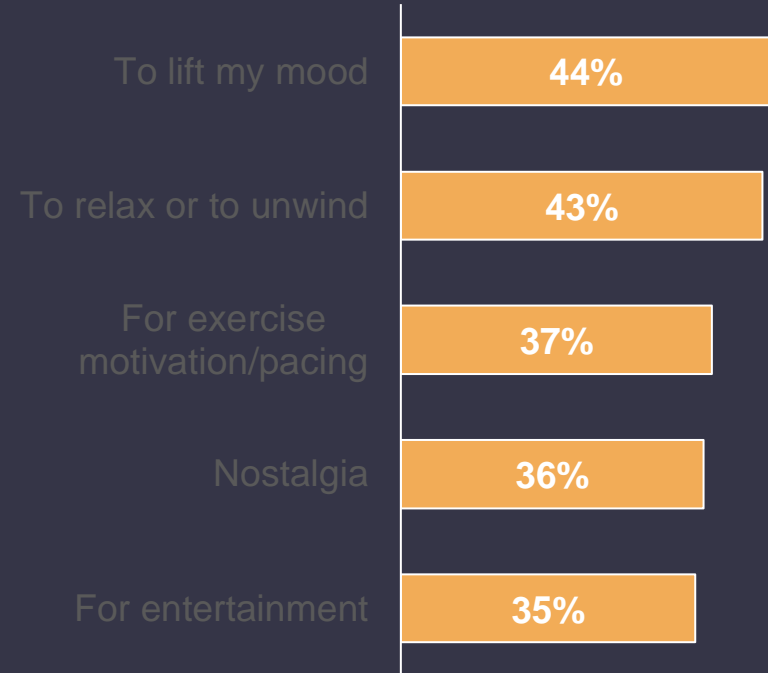
# People are most likely to be relaxing when listening to podcasts



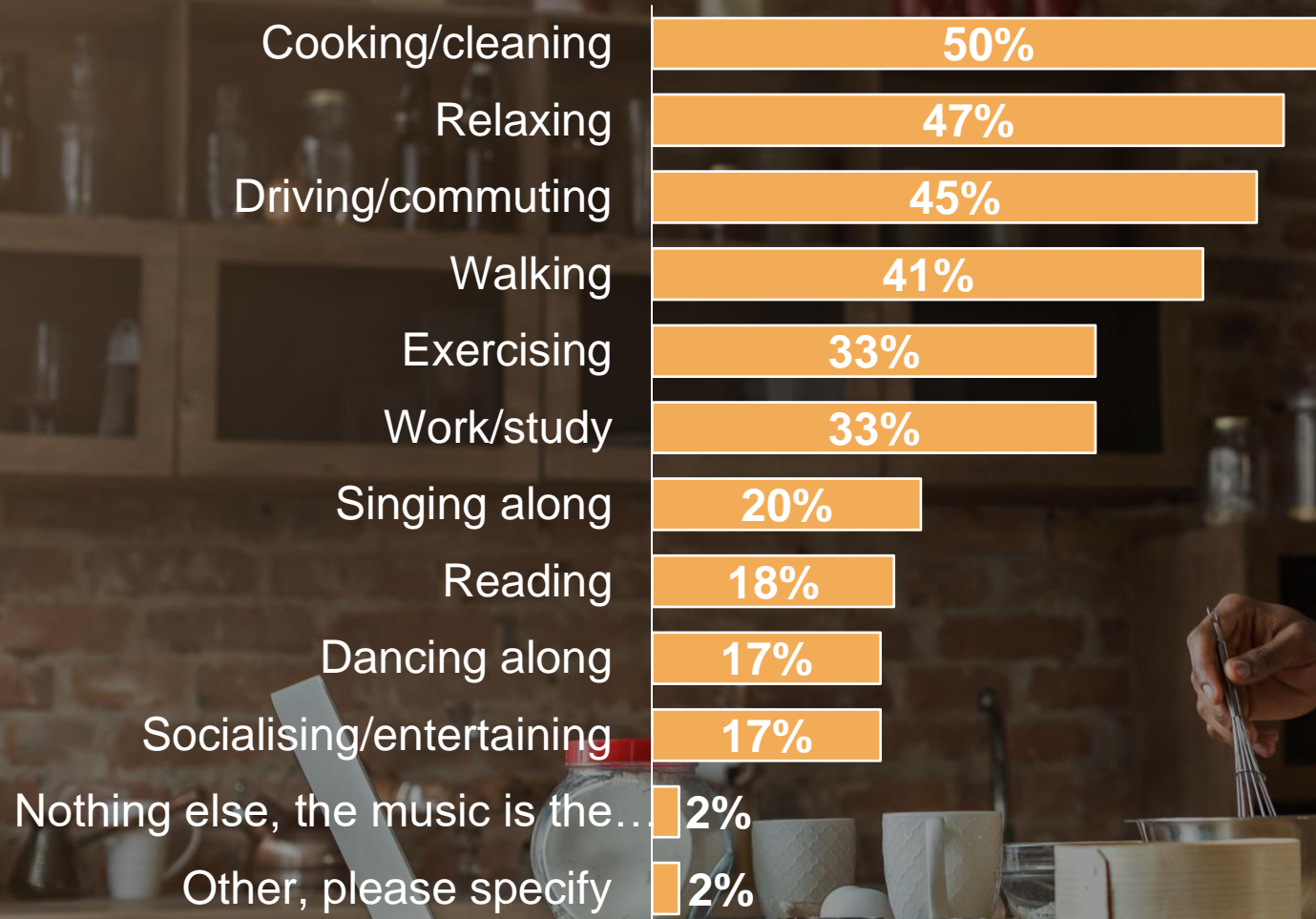
# Music – Mood impact



## Top 5 reasons to listen



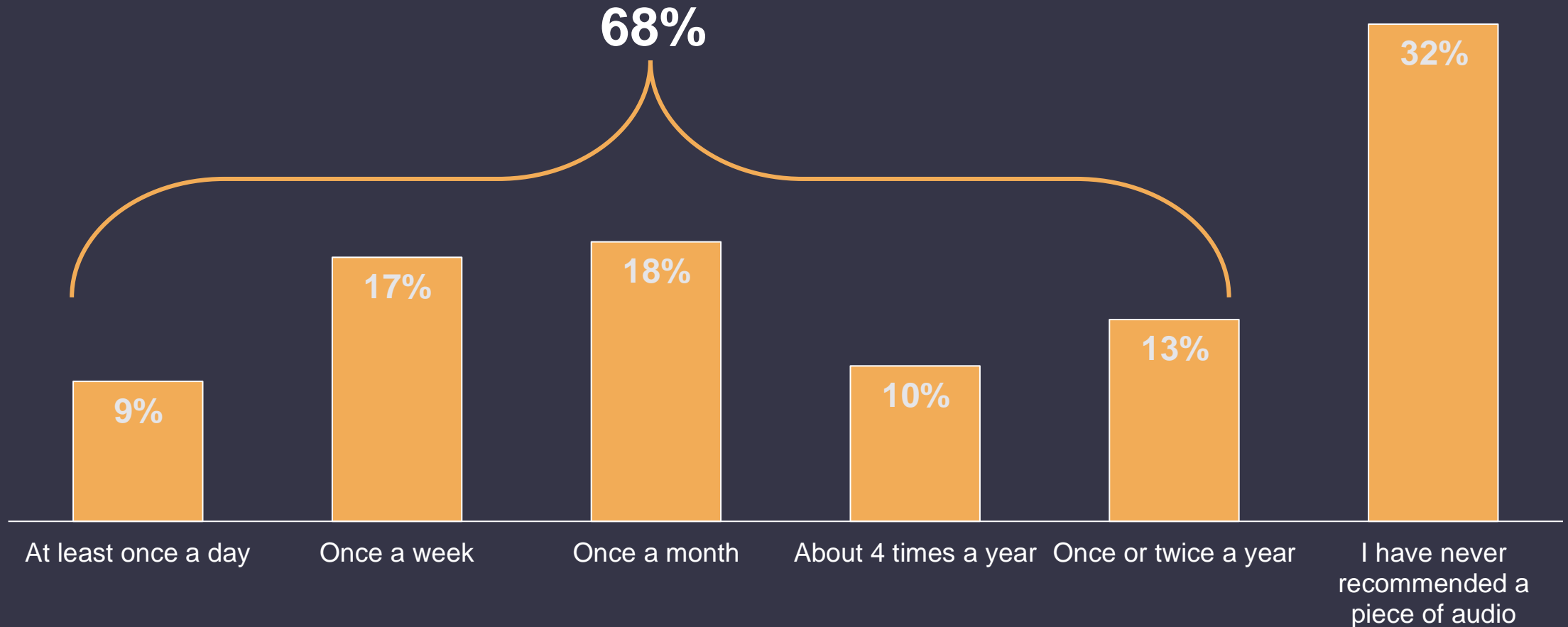
# Cooking/cleaning and relaxing are the most frequent things people do while listening to music



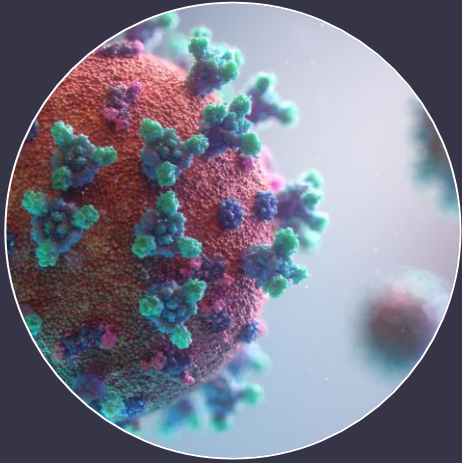
Trust in content is critical



Over two thirds of people have recommended a piece of audio, with songs most often to have been recommended



## Strong relationships are built through audio



**60%**

Radio is a trusted source of Covid19 info.



**32%**

Feel like radio presenters are friends



**29%**

Feel like podcaster is a friend



**49%**

Would be sad if a radio presenter left a show they liked

# Still high levels of discomfort sharing financial info via audio

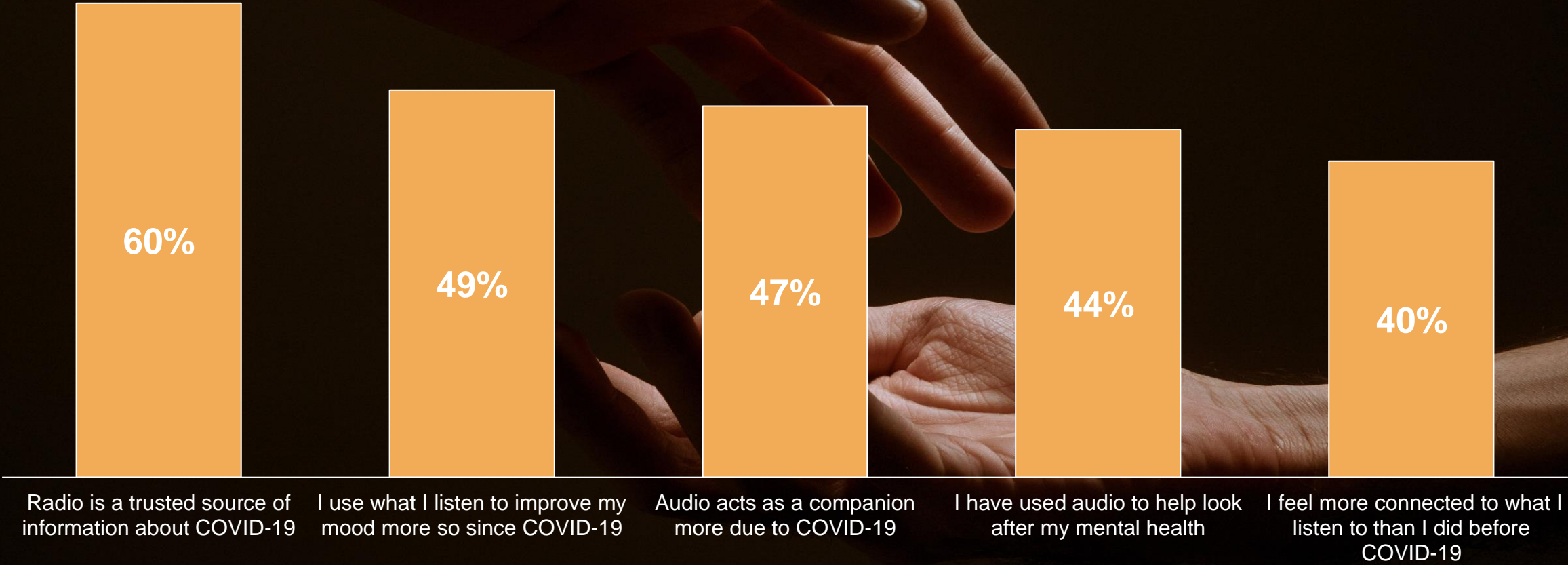




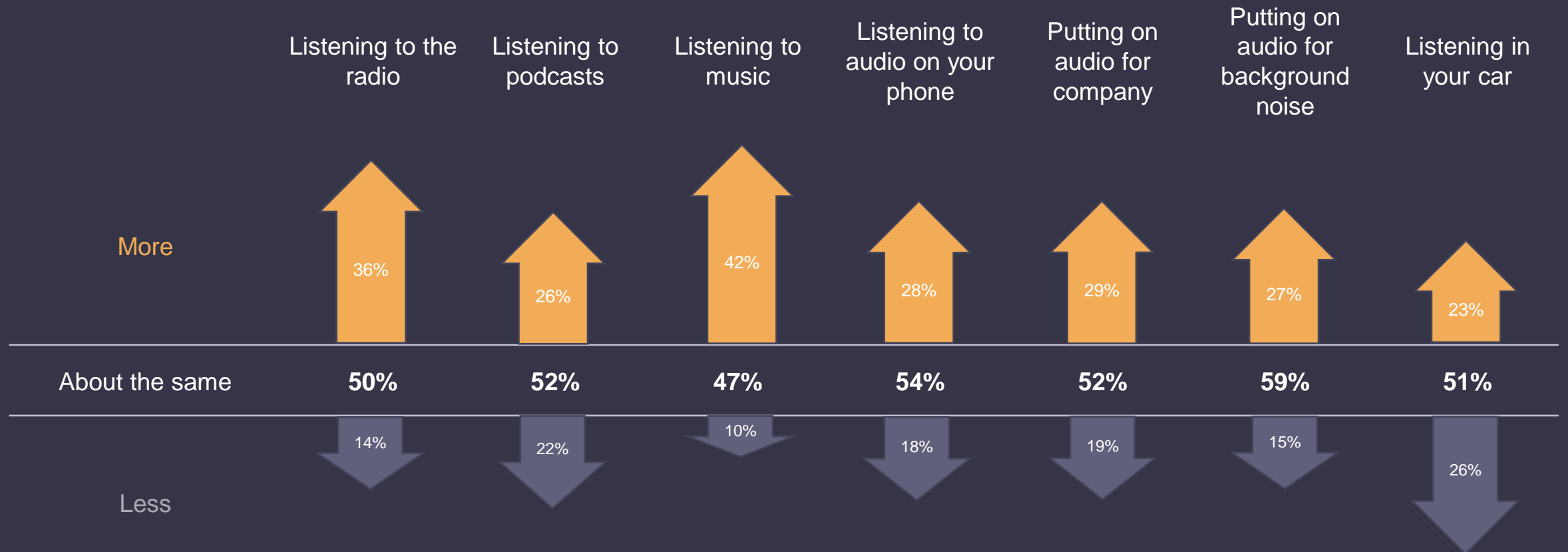
Covid has changed the  
way we listen



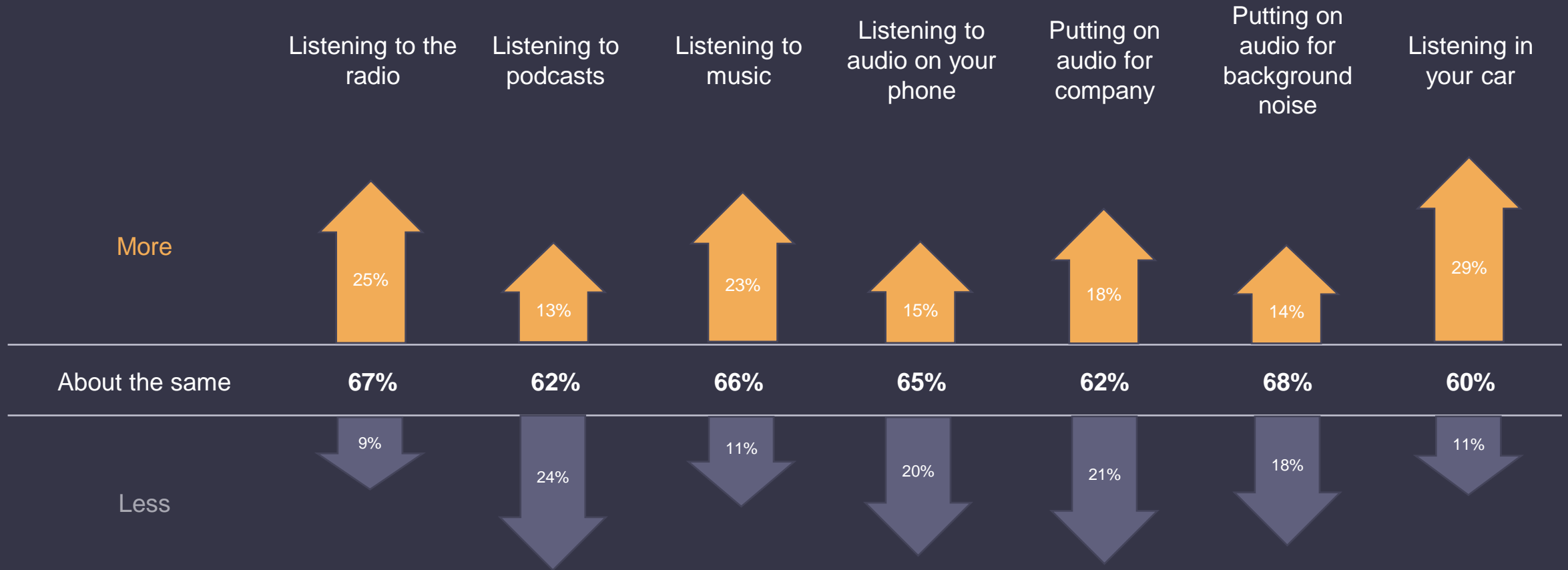
# Audio has proven invaluable during the pandemic



# Across almost all audio listenership increased during lockdown



And most people feel that their COVID audio behaviours are here to stay – with listening in the car increasing with potential commutes resuming



Q32 As lockdown restrictions ease and you return to a new routine, do you think you will be

A large crowd of people is silhouetted against a bright, glowing light source, likely a stage or concert. The scene is dark, with the light creating a strong contrast and casting long, thin rays of light across the space. The crowd is dense, and the overall atmosphere is one of a high-energy event.

A new audio  
listening segmentation

# 18 listening motivations and behaviours

Music is a very important part of my life

I take time to choose what I'm listening to

I tend to put on audio (radio, podcasts, music or audiobooks) for background noise

I only listen to audio when I'm going somewhere (e.g. in the car, walking)

I always put on audio while doing menial tasks to help pass the time (e.g. cooking, cleaning)

I always listen out for service-information (e.g. traffic news, weather news) on the radio

I often listen to audio while doing other tasks which require concentration (e.g. while working/studying)

I prefer to listen to a local rather than a national radio station

I tend to have the radio on for background noise

I like to listen to audio while exercising

I tend to change stations when adverts come on the radio

I am willing to pay to use a service such as Spotify if it means I don't have to listen to adverts

What I listen to is part of my routine

When I go for a walk, audio keeps me company

I only listen to audio when I'm going somewhere (e.g. in the car, walking)

I can't wait for the next episode of my favourite podcast to come out

I only listen to my digital audio player/smartphone

If I miss my favourite radio show I will catch up online

# 18 listening motivations and behaviours



# Four discrete listening segments



# Audio motivation



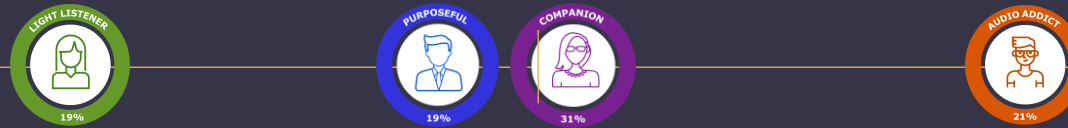


# Segments during Covid19

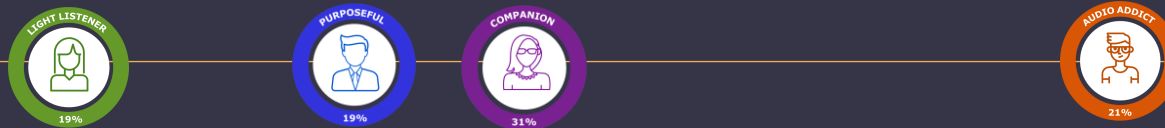
Radio trusted for Covid19 information



Listen to improve mood more since COVID-19



More of a companion during COVID-19



Helped look after my mental health



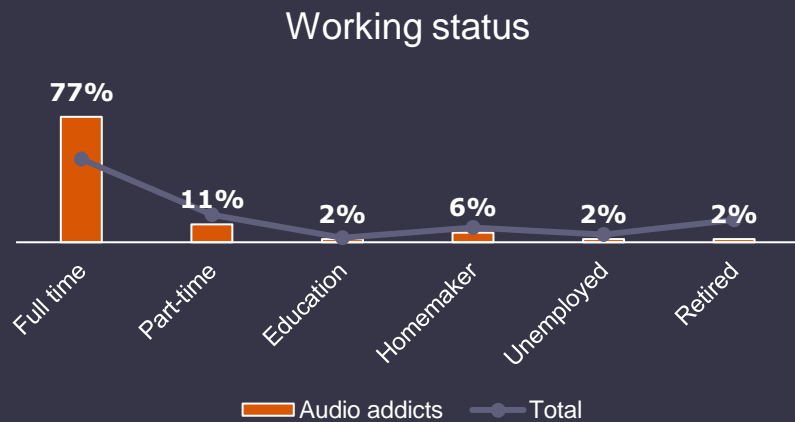
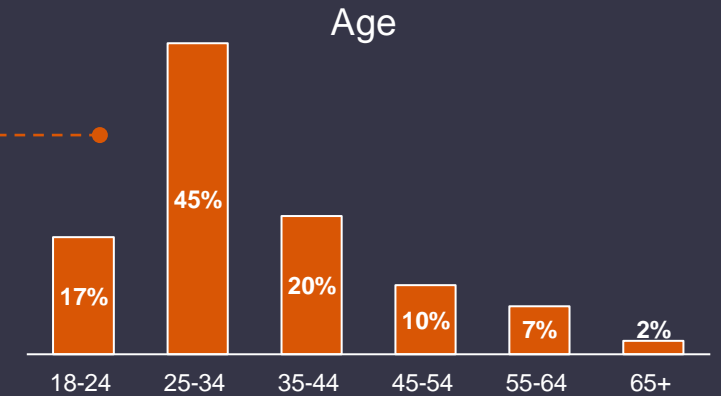
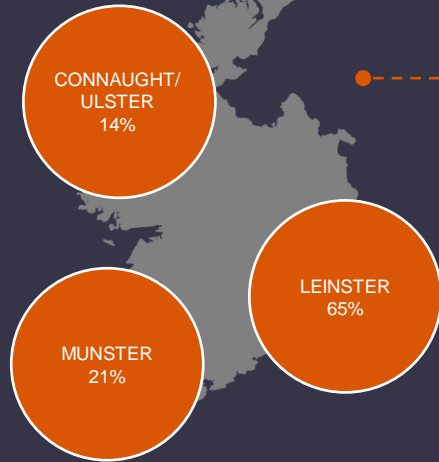
*Which, if any, of the following do you personally use?*



Getting to know our segments

21%

Audio addicts **enjoy life** to the full and are the life and soul of every party. They are **open to life's challenges, social and ambitious**. They spend money without thinking and **THEY LOVE AUDIO!**



**51 hours**  
of audio per week

# AUDIO ADDICT



To stay informed **60%** & be entertained **54%**



Listen mainly

- To radio in the car (**60%**)
- To music in the car (**57%**) or on a radio (**55%**)
- To podcasts on smartphone with earphones (**51%**)

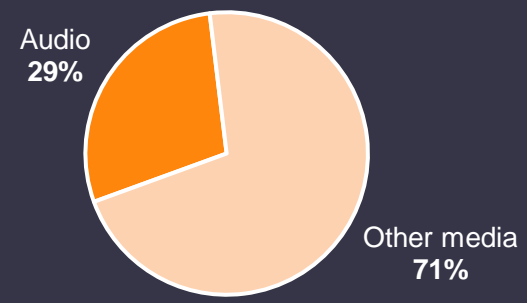
To be entertained **53%** (*inc make me laugh 55%*) & be educated **57%**



To lift my mood **49%** and exercise **44%**



Media split

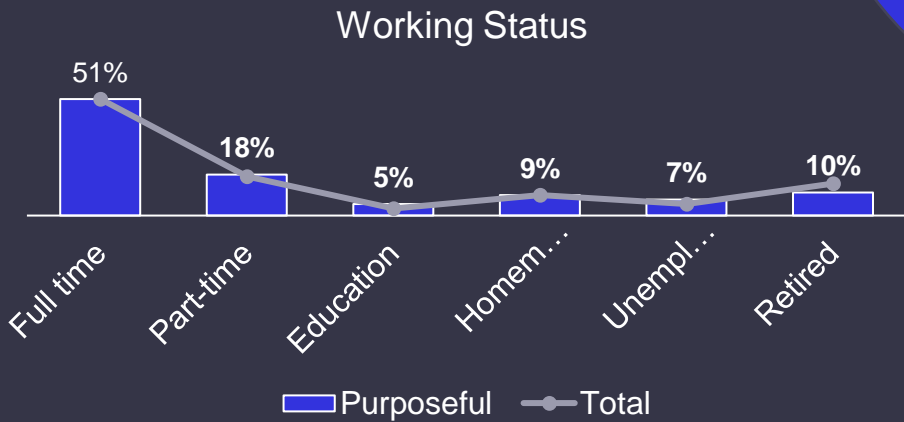
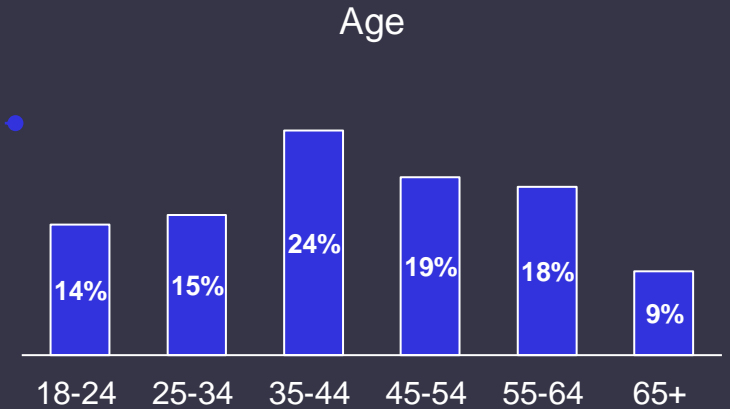
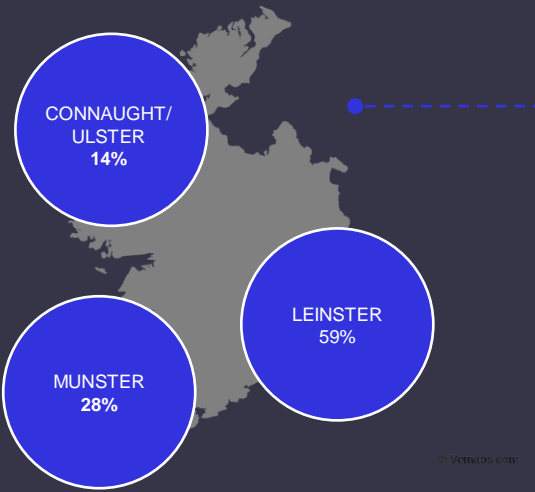


51 hours of audio per week

- **10.9** hours Radio
- **9.7** hours free streamed music
- **10.5** hours paid streamed music
- **10.4** hours podcasts

31%

Purposeful listeners like to be in control, they prefer to download content and shop around to get the best value for money. They tend to make active choices about the audio they're listening to and the role that it plays. Purposeful Listeners are less likely to listen while doing tasks that require concentration and **THEY ENJOY THE INTIMACY OF EARPHONES**



22 hours  
of audio per week

To stay informed **64%** & for background noise **48%**



Listen mainly

- To radio in the car (**70%**)
- To music in the car (**56%**) or on smartphone with earphones (**52%**)
- To podcasts on smartphone with earphones (**48%**)



For education on a topic **48%**, to make me laugh **44%**



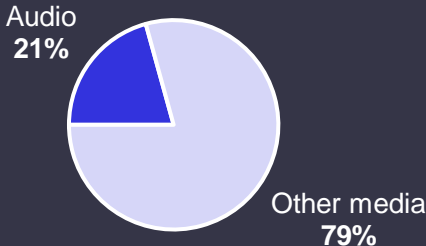
22 hours of audio per week

- **7.4** hours Radio
- **5.5** hours free streamed music
- **4.9** hours paid streamed music
- **4** hours podcasts

To lift my mood **55%** and to relax and unwind **53%**

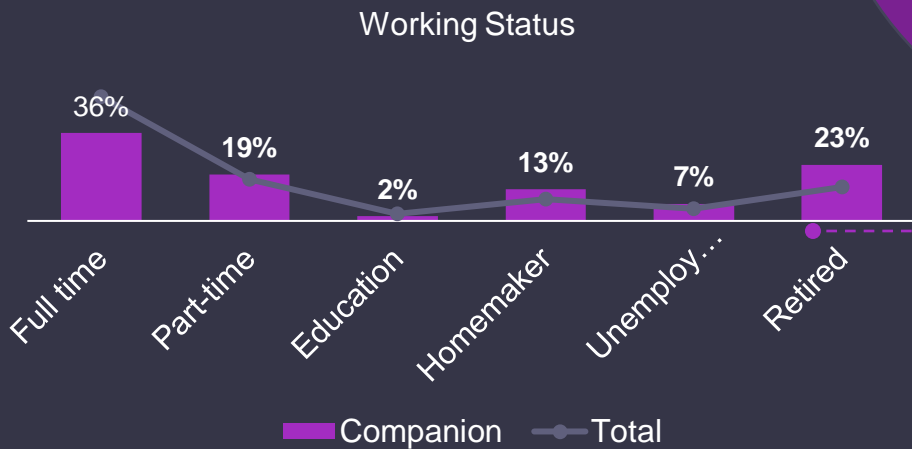
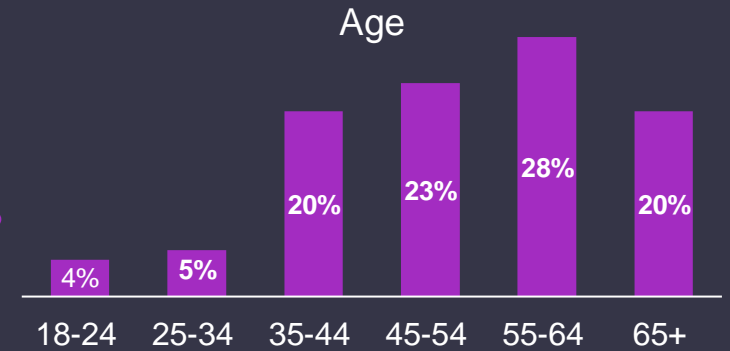
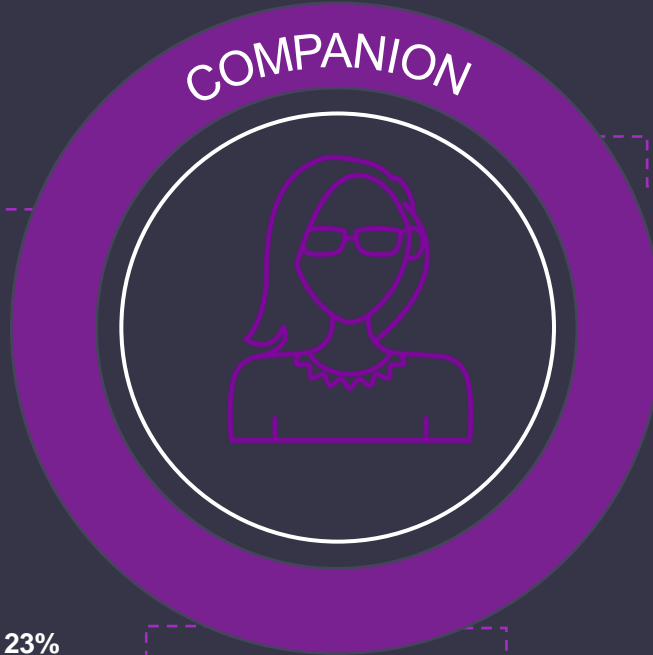
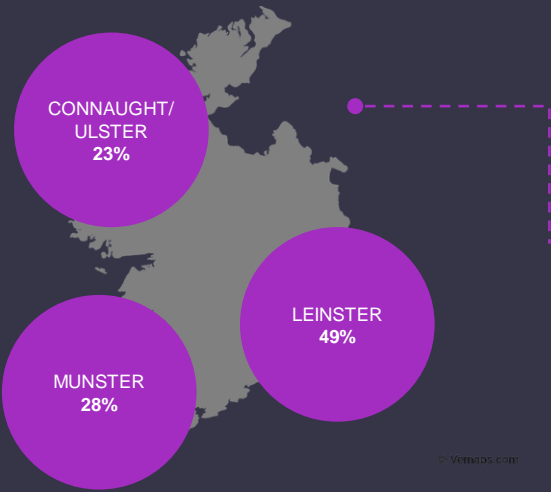


Media split



29%

Companion listeners tend to be a bit older, like to shop around and get value for money and enjoying life is very important. Companions are more likely to be radio listeners and are much less likely to listen to podcasts than other groups. They listen to a lot of radio and it often acts as a companion as well as keeping them informed.



64%

19 hours  
of audio per week



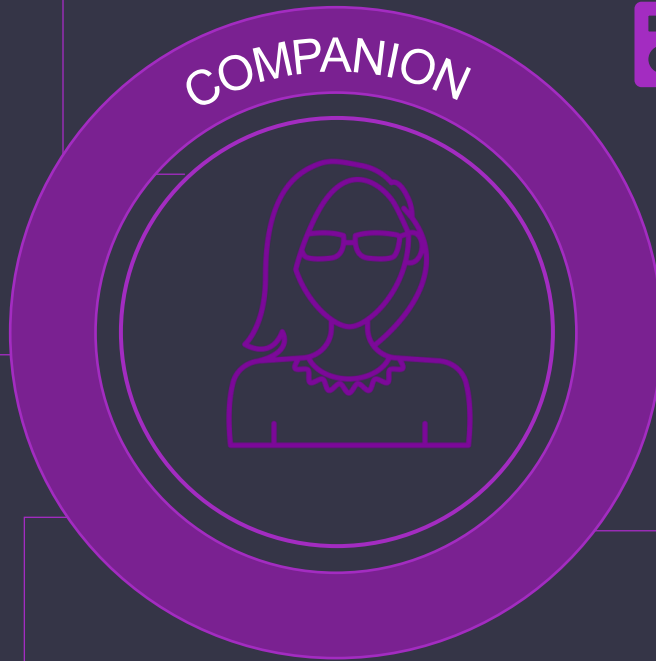
To stay informed **88%**,  
be entertained **75%** &  
background noise **75%**



For education on a topic  
**21%** or to make me  
laugh **17%**



To relax and unwind  
**39%** or to lift my  
mood **38%**



Listen mainly

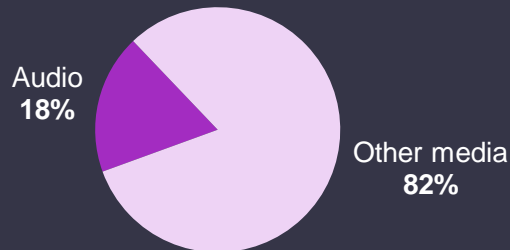
- To radio in the car (**74%**) or on radio (**59%**)
- To music in the car (**70%**) or on radio (**57%**)
- To podcasts on smartphone with earphones (**32%**)



19 hours of audio per week

- **13.9** hours Radio
- **2.7** hours free  
streamed music
- **2** hours paid streamed music
- **0.5** hours podcasts

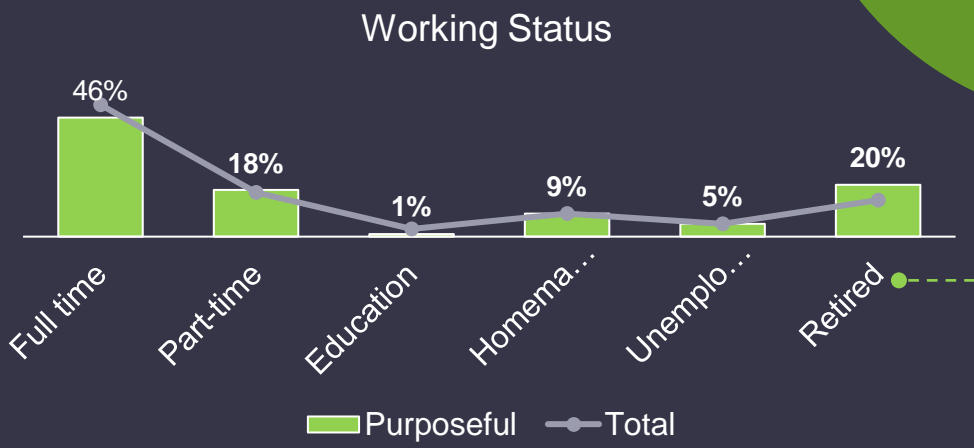
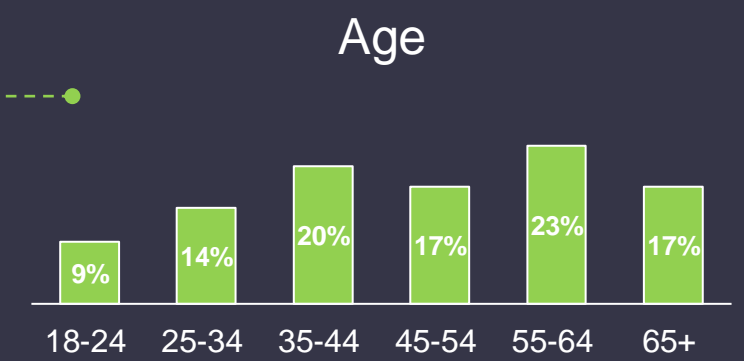
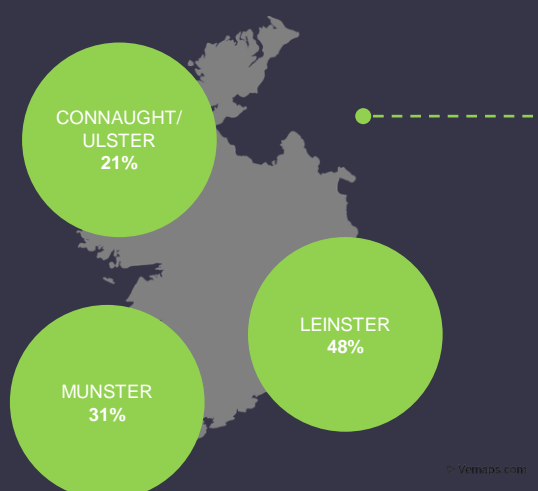
Media split





19%

Light listeners tend to be more **cautious** by nature. They spend less time engaging with media than average. They tend to **make more passive choices about the audio** they're listening to, for example letting others choose radio channels.



51%



11 hours  
of audio per week

To stay informed **51%**  
& be entertained **36%**



Related to interests  
**20%** or for education  
on a topic **17%**



To relax and unwind  
**29%** and to lift my  
mood **27%**



Listen mainly

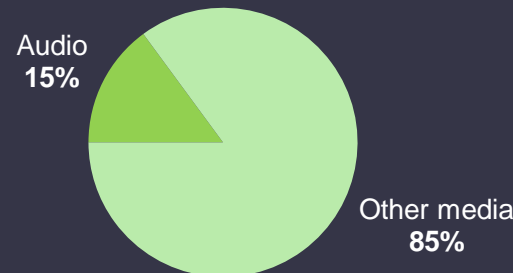
- To radio in the car (**70%**)
- To music in the car (**50%**)
- To podcasts on smartphone with earphones (**32%**)



11 hours of audio per week

- **5.1** hours Radio
- **2.2** hours free streamed music
- **1.9** hours paid streamed music
- **1.9** hours podcasts

Media split



## Panel Discussion



**Mike Cass**

Content Director  
Virgin Radio UK



**Jennifer Fitzsimons**

Head of Marketing  
Harvey Norman



**Emma Nolan**

10-3 Show Presenter  
FM104

Hosted by **Brian McCarthy**

# Questions



Ask me a question

Type something....