

**SOUND AFFECTS:
WILL AI KILL
THE RADIO STAR?**

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Agenda

Event Introduction

Shane McGonigle

Sound Affects 3 – The Research

Dael Wood & Claire O'Rourke

Urban Media & Audio Advances

Brian McCarthy

Q&A

All

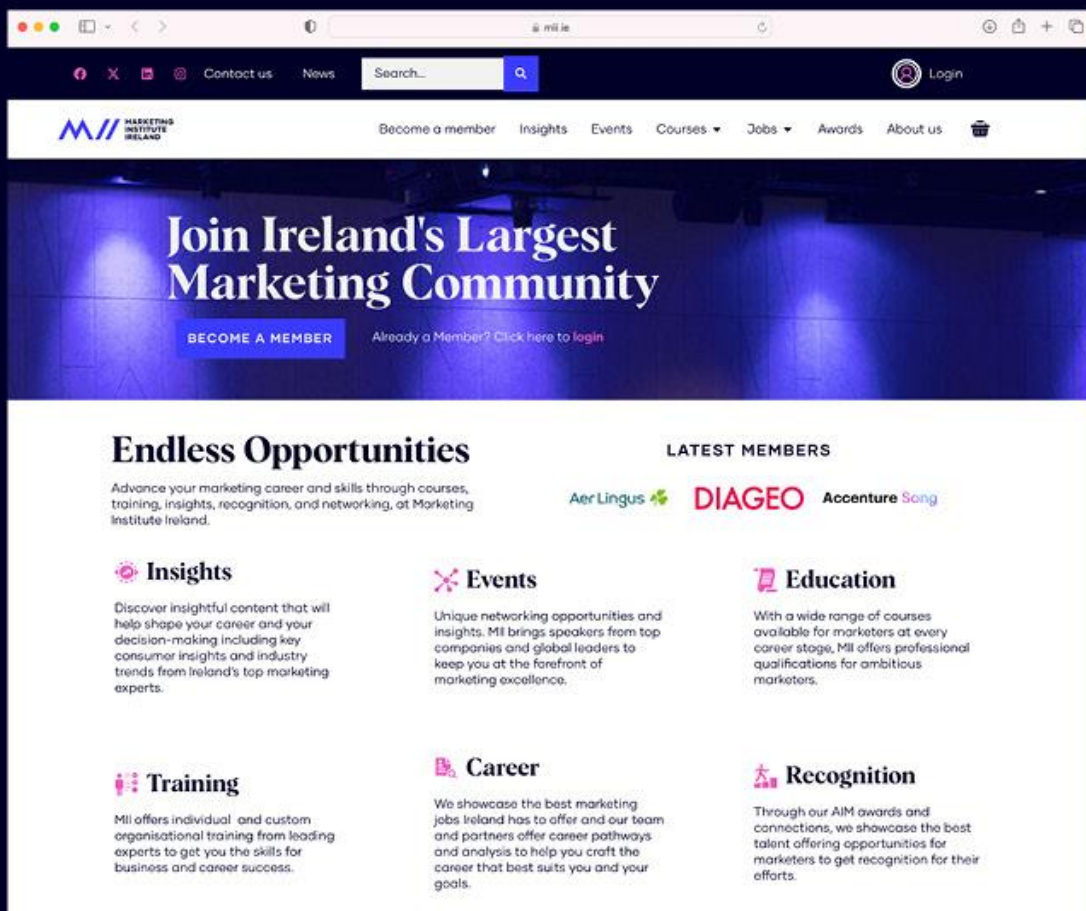
Shane McGonigle



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IRELAND**



In your Inbox



The screenshot shows the Marketing Institute Ireland website. At the top, there is a navigation bar with the MII logo, a search bar, and a 'Login' button. Below this is a secondary navigation bar with links for 'Become a member', 'Insights', 'Events', 'Courses', 'Jobs', 'Awards', and 'About us'. The main content area features a large blue banner with the text 'Join Ireland's Largest Marketing Community' and a 'BECOME A MEMBER' button. Below the banner, there are several sections: 'Endless Opportunities' with a sub-header 'LATEST MEMBERS' listing Aer Lingus, DIAGEO, and Accenture Song; 'Insights', 'Events', 'Education', 'Training', 'Career', and 'Recognition', each with a brief description of the service.

MII Password Reset & Salary Survey

Ready to become a member? [JOIN TODAY](#)



Nov 22nd:
WWSS



Dec 7th:
MII AIM Launch 24



January 17th:
Salary Survey



THE RESEARCH



DAEL WOOD & CLAIRE O'ROURKE

2019

2021

2023



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AEGIS
network



**SOUND AFFECTS:
HAS DIGITAL **KILLED**
THE RADIO STAR?**



**SOUND AFFECTS:
AUDIO REVIVAL**



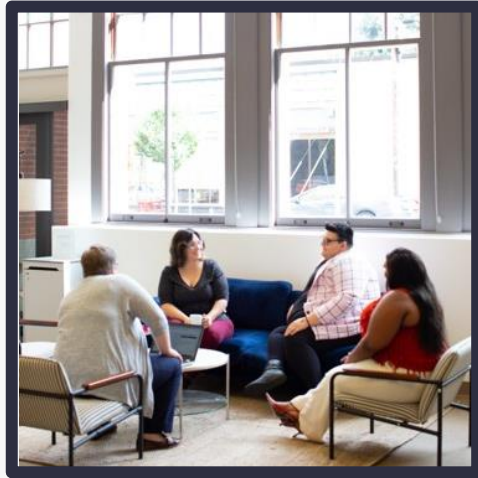
**SOUND AFFECTS:
WILL AI KILL
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- 1 Methodology**
- 2 New normal - listening in 2023**
- 3 Radio endures**
- 4 Podcasts listening has settled**
- 5 Beyond demo's**
- 6 The rapid rise of AI**



Qual and quant AI testing
and attitudes and
behaviour exploration



National in-depth
behaviour and usage
survey





Aug - Sept 2023

NEW NORMAL

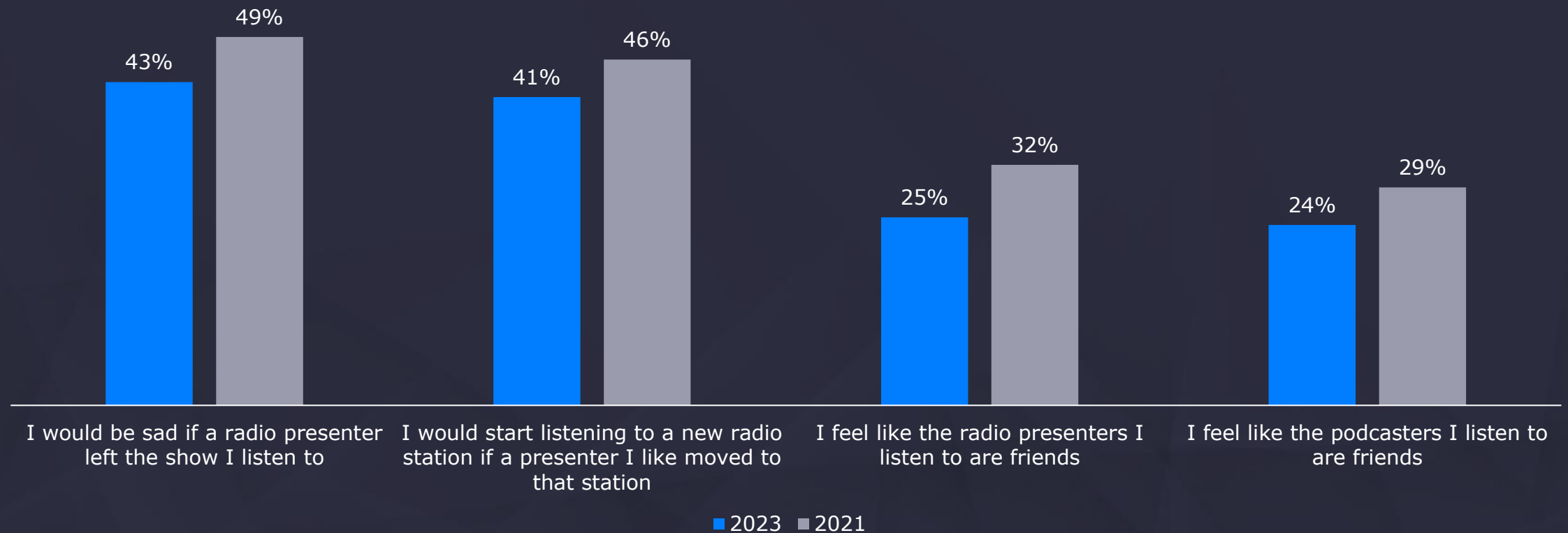
LISTENING IN 2023



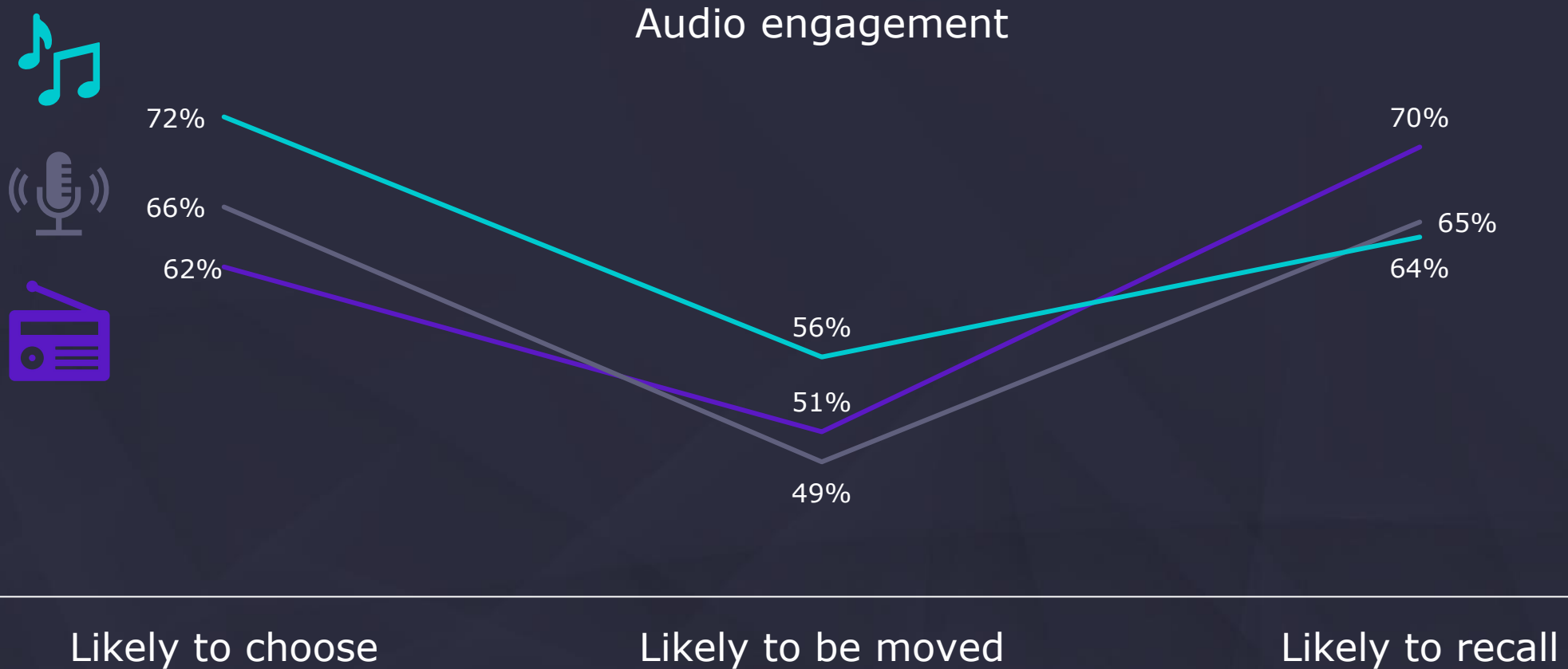
	Listening to the radio	Listening to podcasts	Listening to free streamed music	Listening to paid streamed music	Putting on Audio for company while walking	Putting on Audio for background noise	Listening to lift your mood
Increase since 2021	-	-	 +2%	 +5%	-	-	-
Avg %	86%	55%	60%	51%	53%	50%	65%
Decrease since 2021	-	-			-	-	-

MUSIC - THE AUDIO CHANNEL THAT HAS INCREASED

There has been a slight decrease in the level of engagement with radio and podcast hosts since 2021 – perhaps from a falsely elevated level post Covid

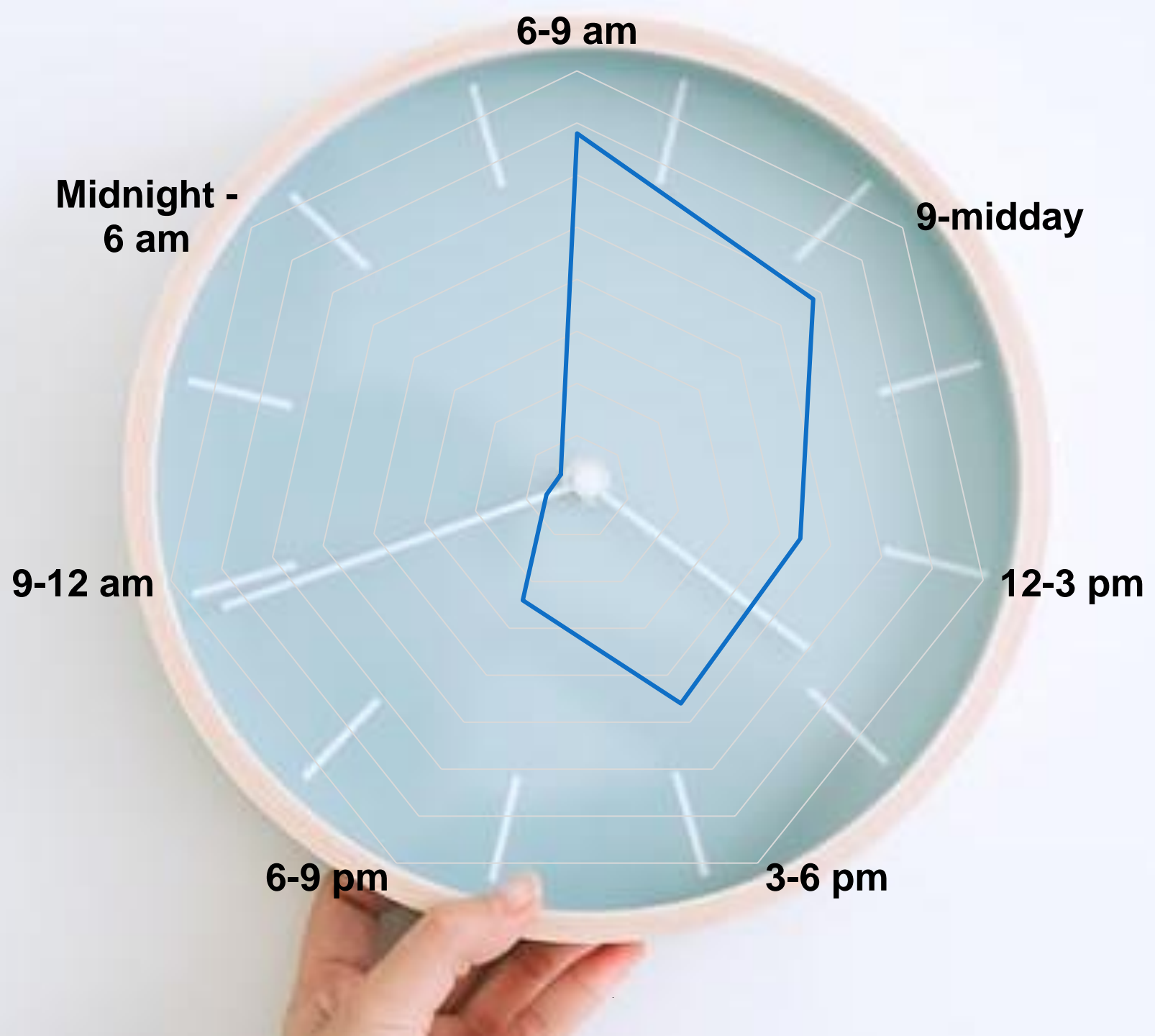


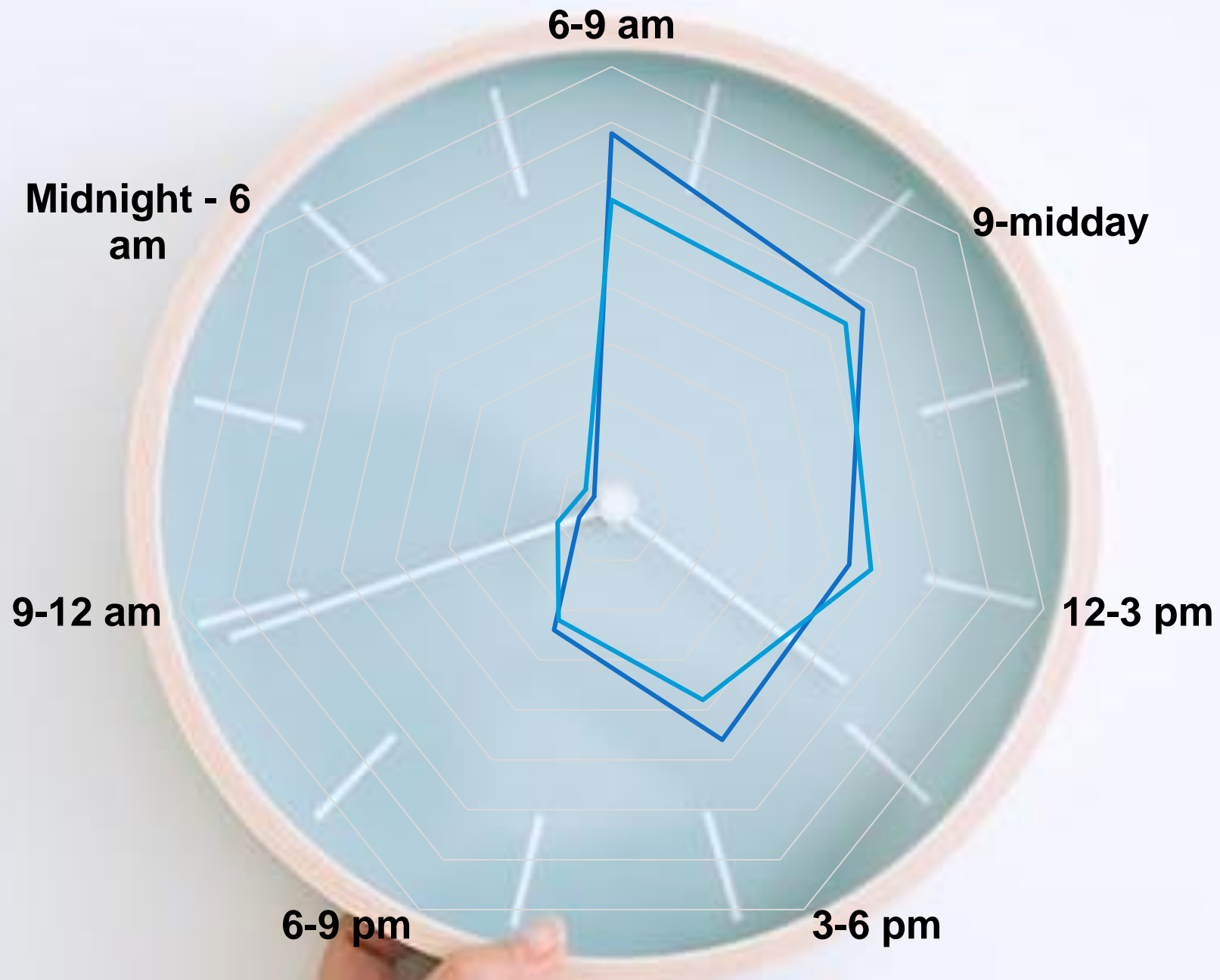
Radio is most likely to be recalled, although music is more likely to be actively chosen



**Different dayparts
suit different
content**



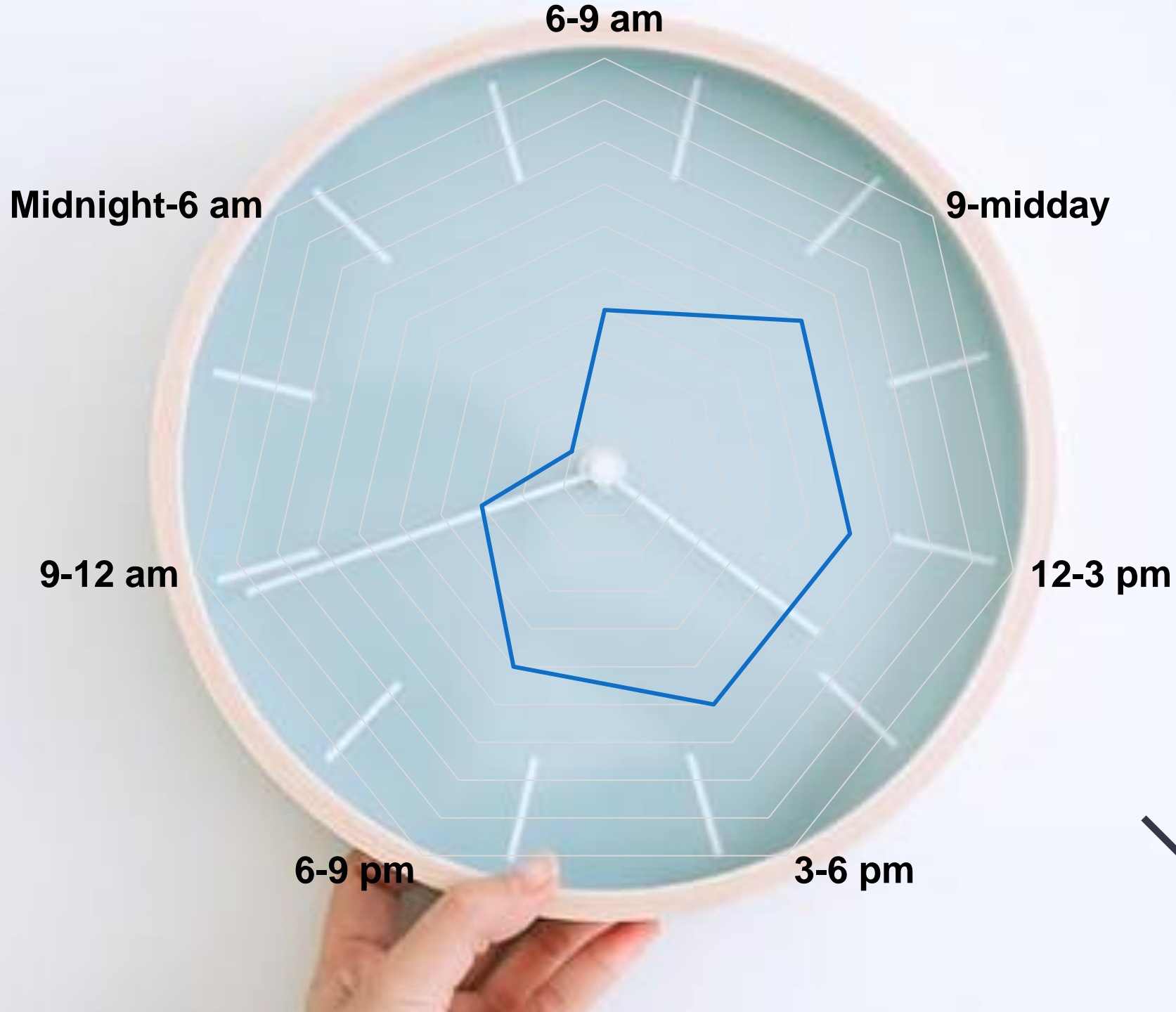


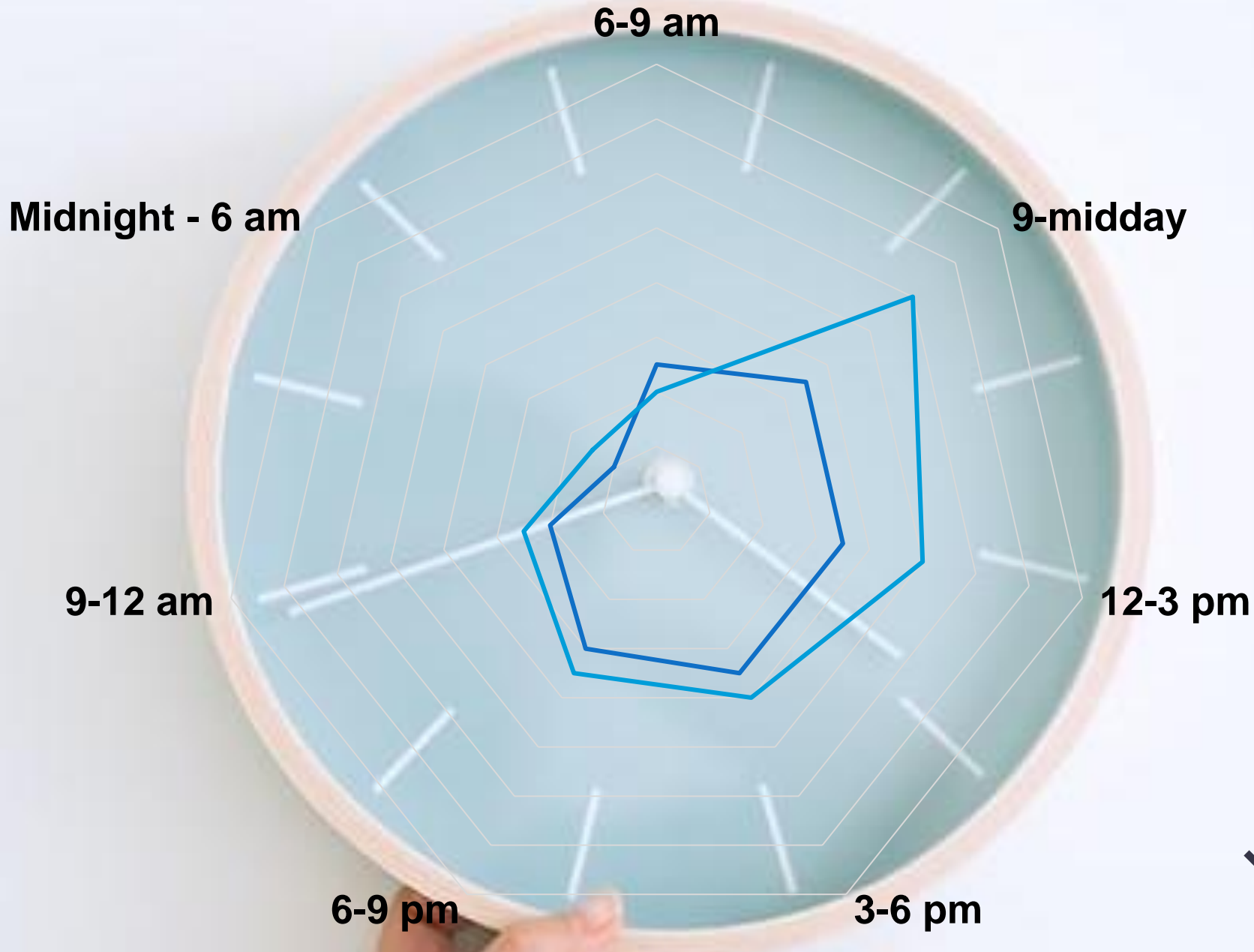


— Listen to live radio 2023

— Listen to live radio 2021







— Listen to listen back/
playback radio 2023

— Listen to listen back/
playback radio 2021



Midnight-6 am

6-9 am

9-midday

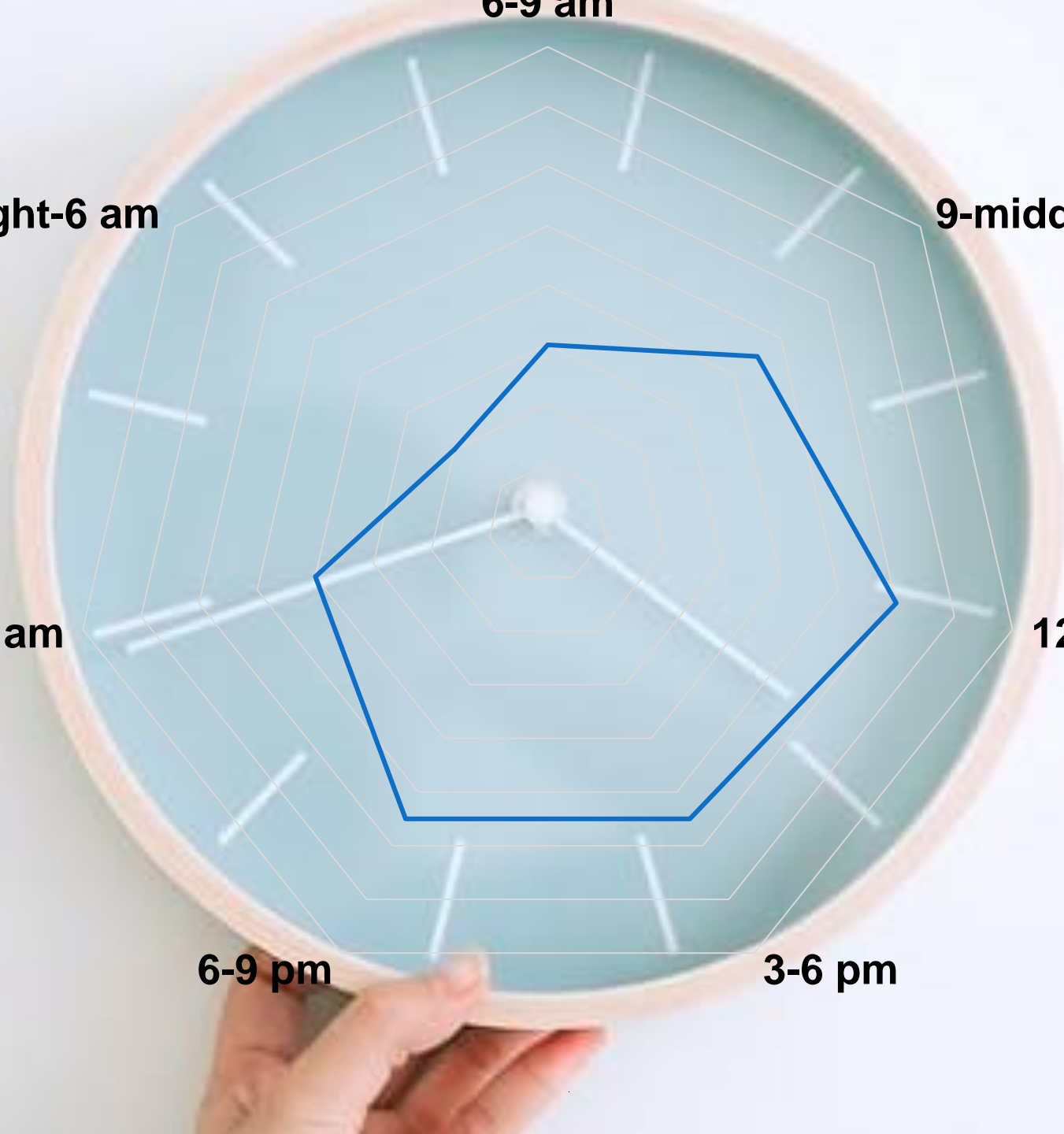
9-12 am

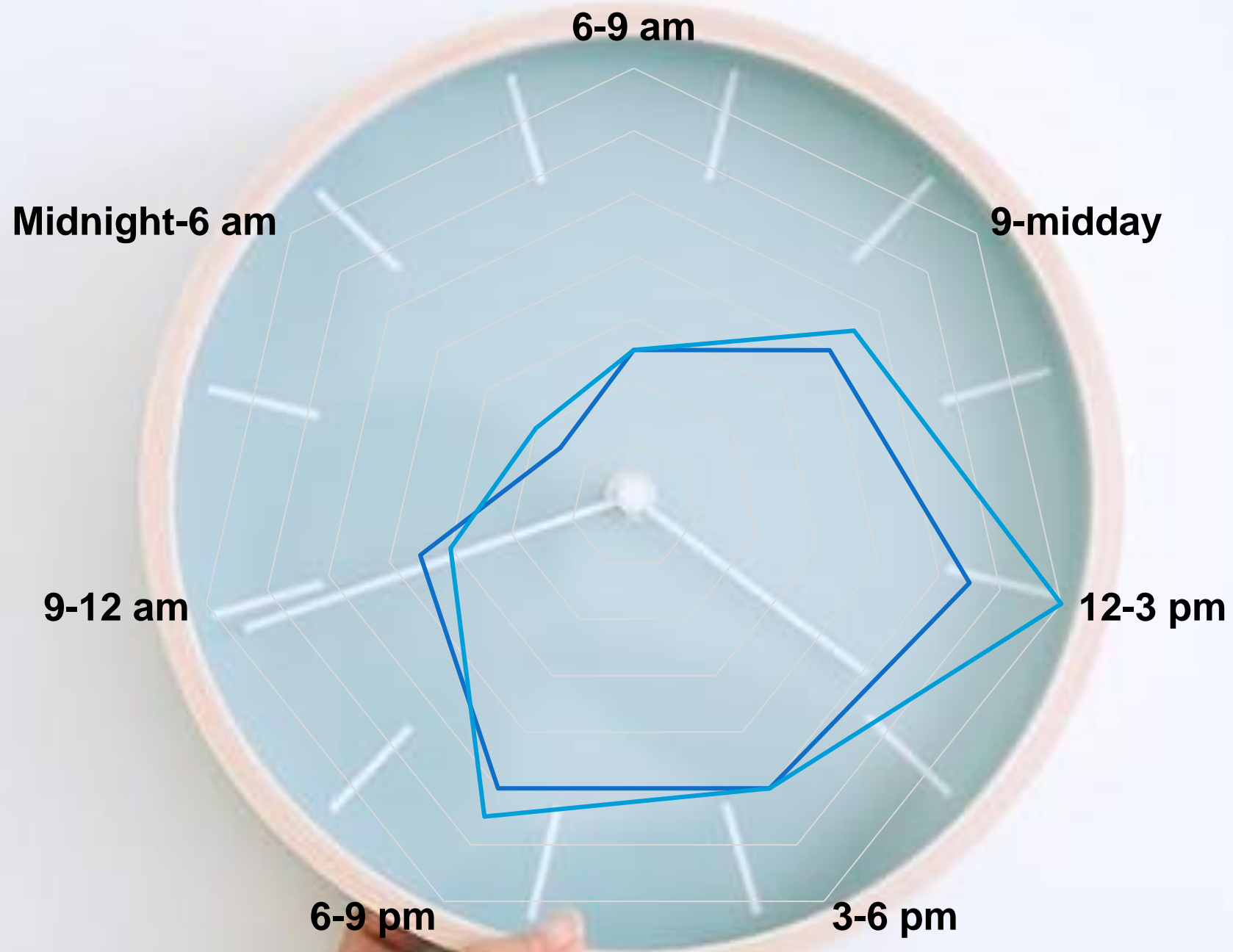
12-3 pm

6-9 pm

3-6 pm

FREE





— Listen to free streaming music services 2023

— Listen to free streaming music services 2021



Midnight-6 am

6-9 am

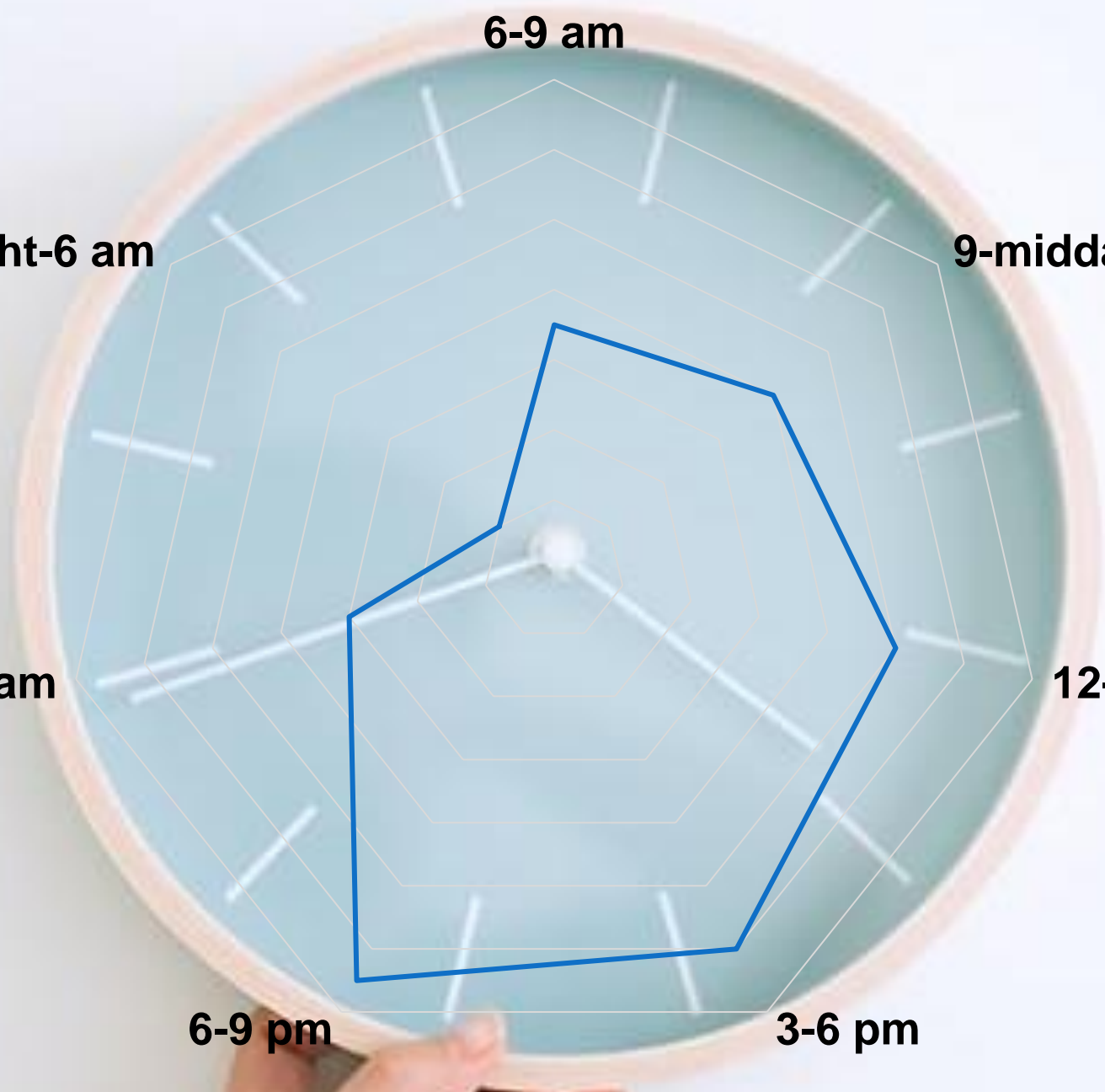
9-midday

9-12 am

12-3 pm

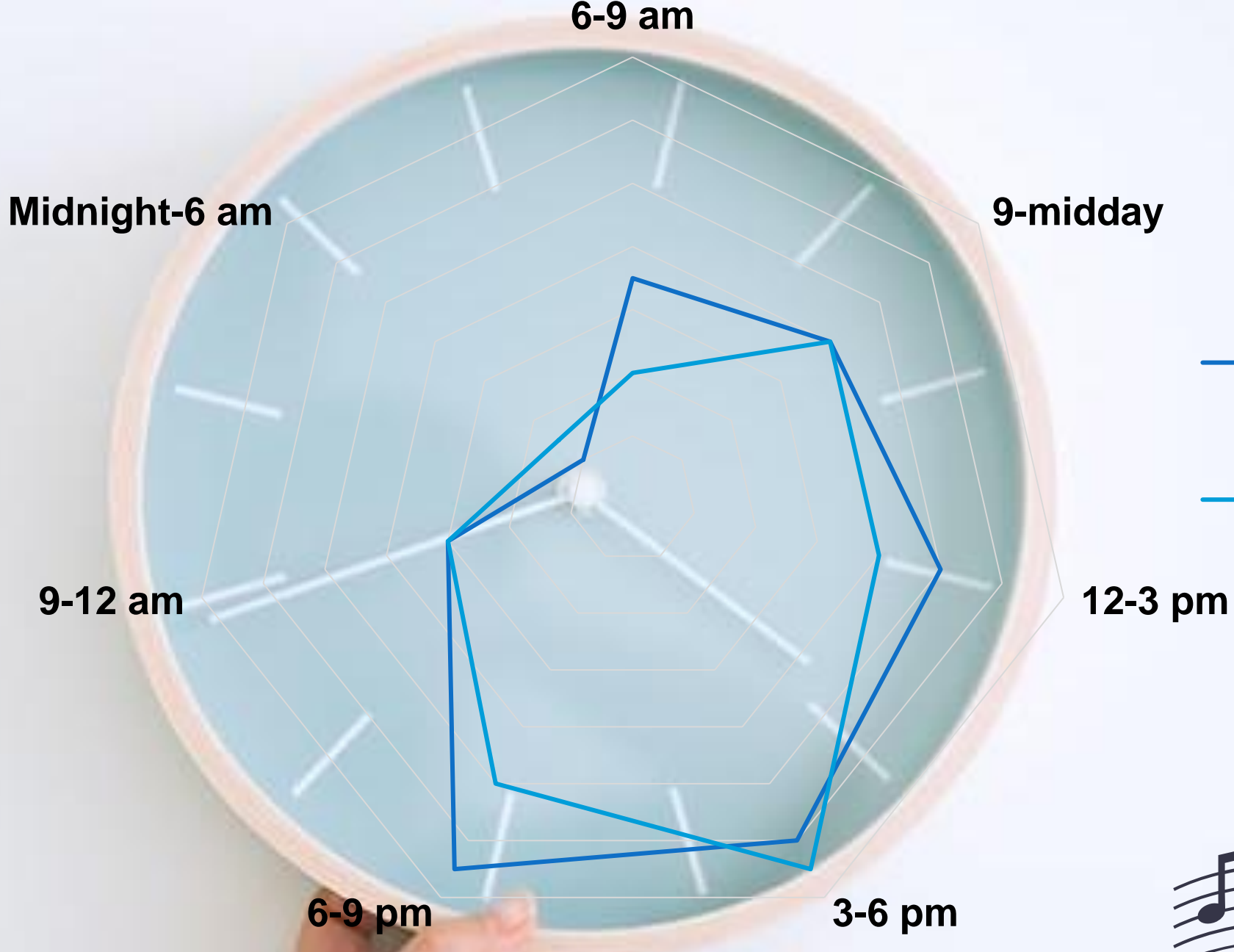
6-9 pm

3-6 pm



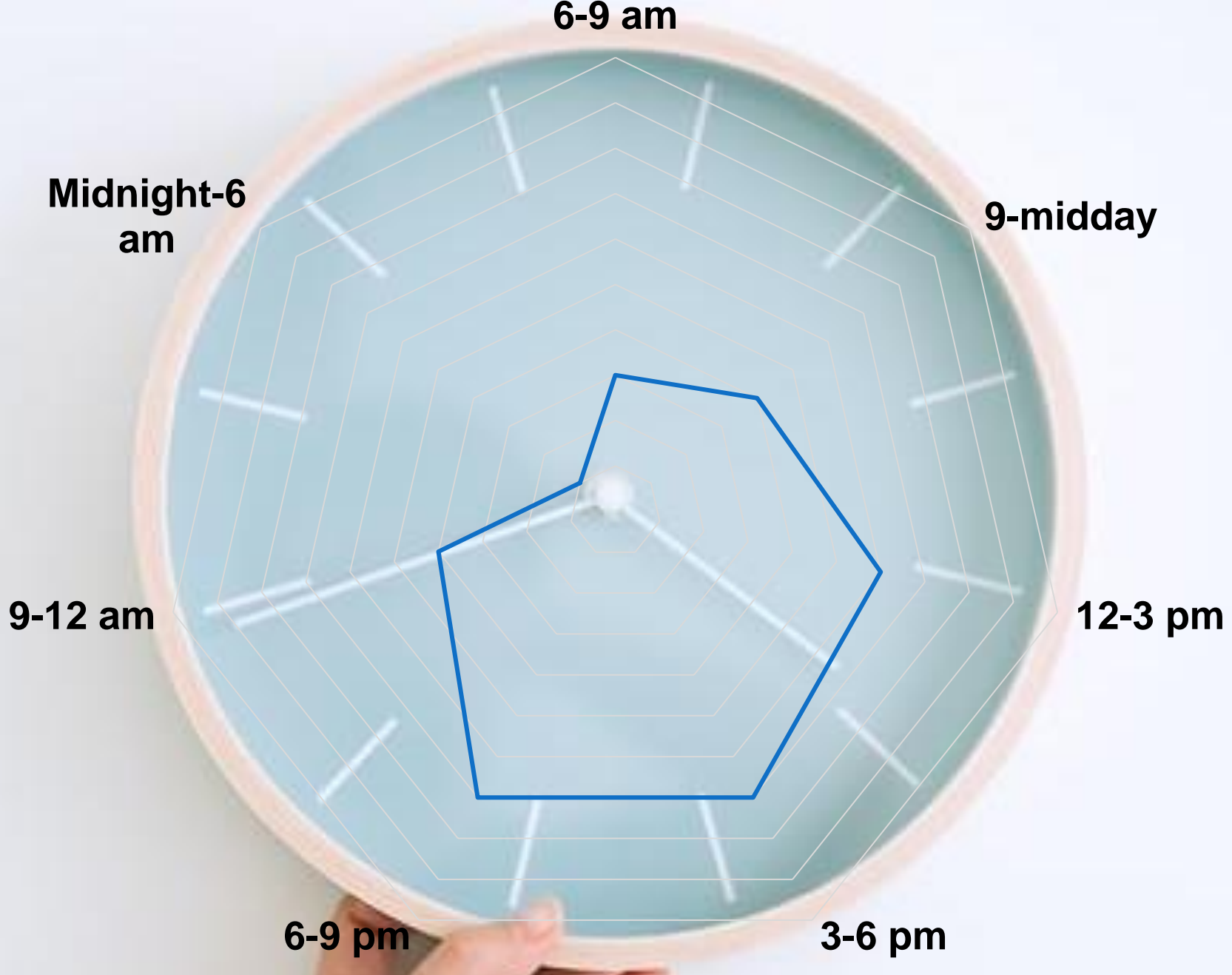
PAID

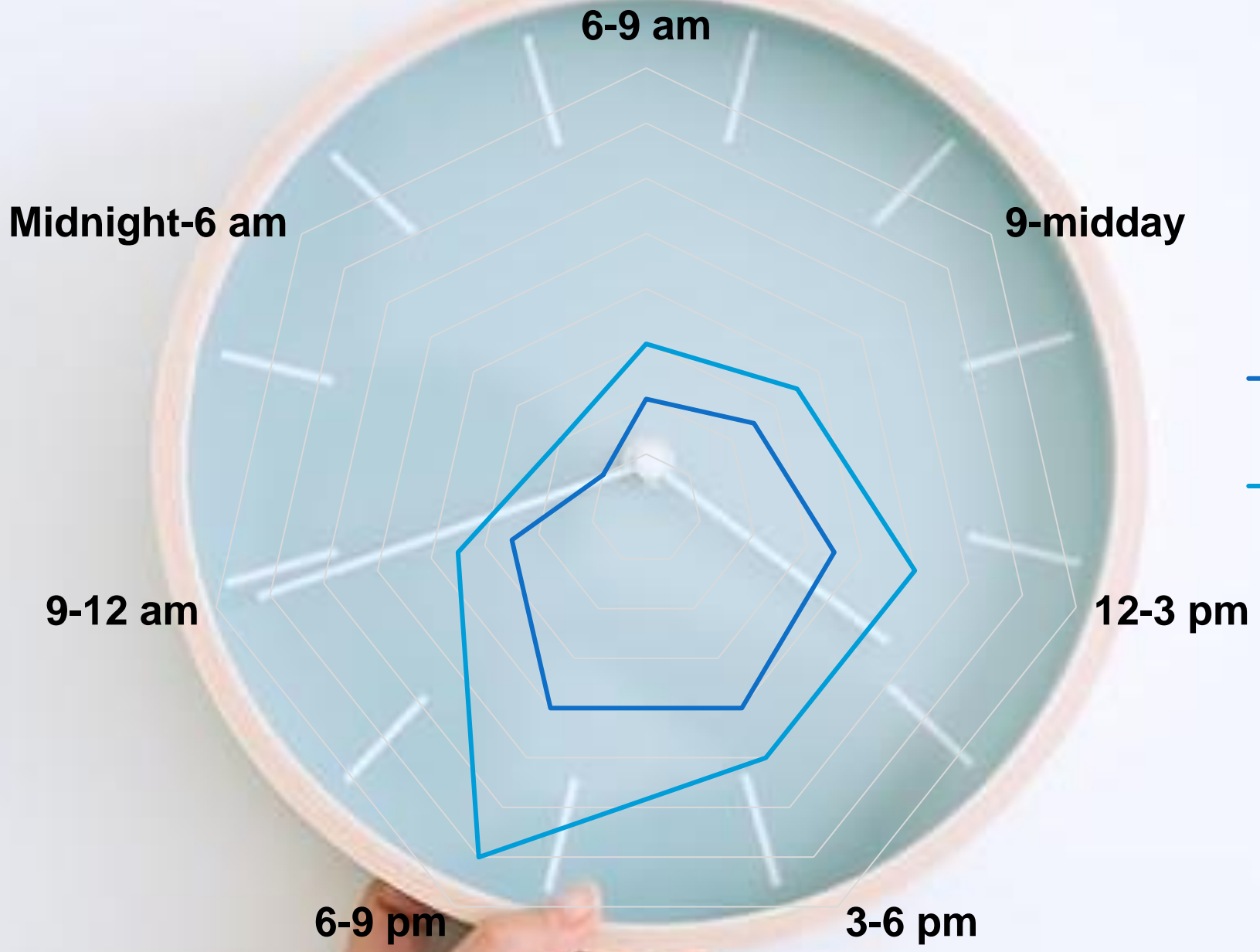




- Listen to paid streaming music services 2023
- Listen to paid streaming music services 2021

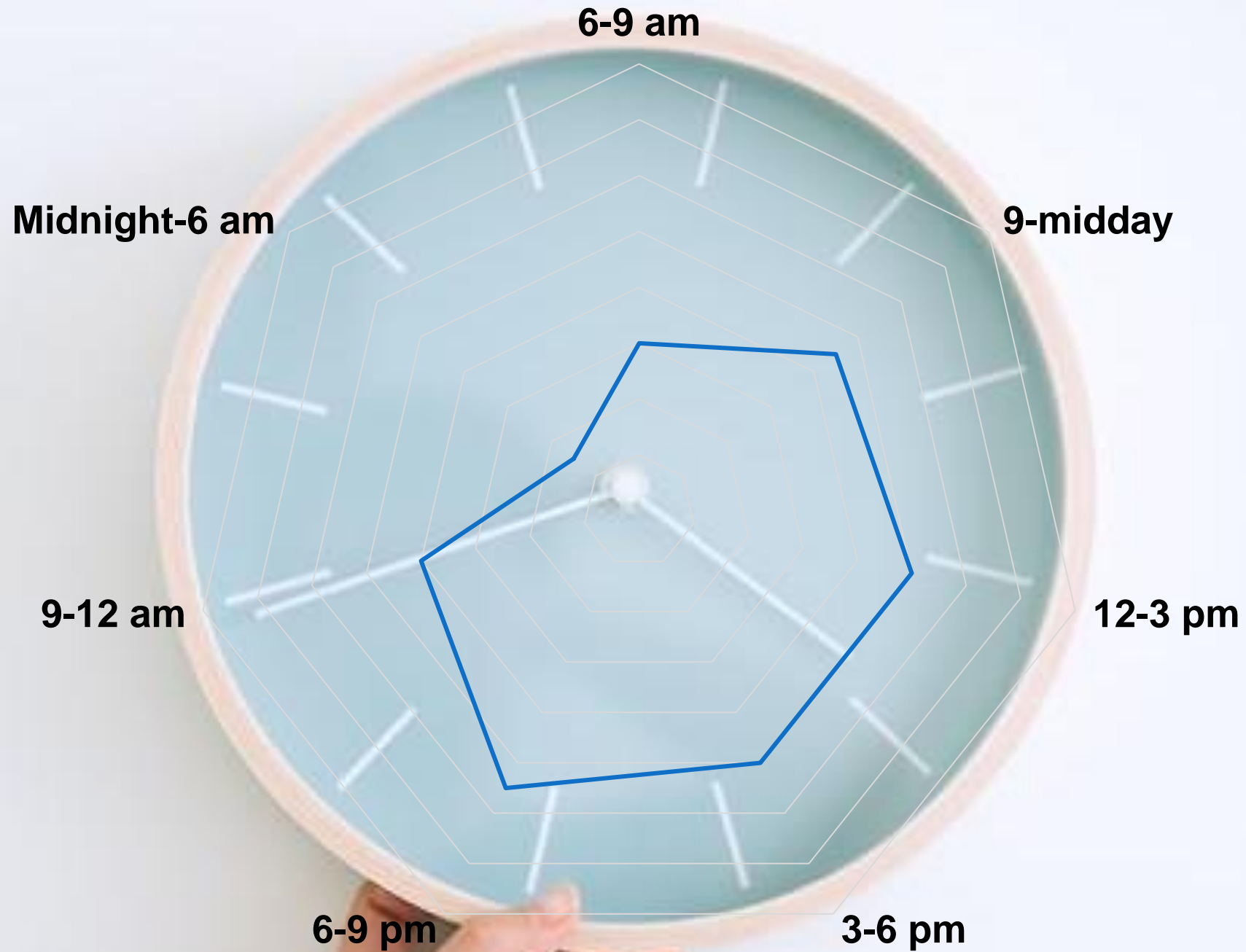






— Non-streamed music 2023
— Non-streamed music 2021





Radio listeners most likely to be driving or commuting while they listen (60% vs 53% in 2021)





Podcasts most likely to be
listened to with
earphones/headphones
(47%)

+4%

Less likely to be listened
to while working (20%)

-9%

More likely to be listened
to while commuting (28%)

+8%



Music most likely to be listened to on car radio (63%)

+4%

Less likely to be listened to while working (31%)

-2%

More likely to be listened to while commuting (53%)




























+8%

Paid music streaming
has increased since
2021 (+6%) while
listening to CDs and
Vinyl have
decreased.

51%



The big winner with the return to 'normal' is the amount of time we spend on the internet on our phones a week (+6hrs)

		16	
		23	 +6.4
		14.3	 +3.2
	-1.8	2.4	
	-1.2	3.5	
	-0.5	9.1	
	-1.2	2.7	
	-0.9	4	
		5.6	 +1
	-0.7	18.5	
	-1.5	3.3	
 +A	-1.6	10.3	
		7.6	
	-2.1	2.9	

RADIO ENDURES



RADIO REMAINS THE MOST LISTENED TO AUDIO TYPE

86%
penetration



9 hours &
6 minutes

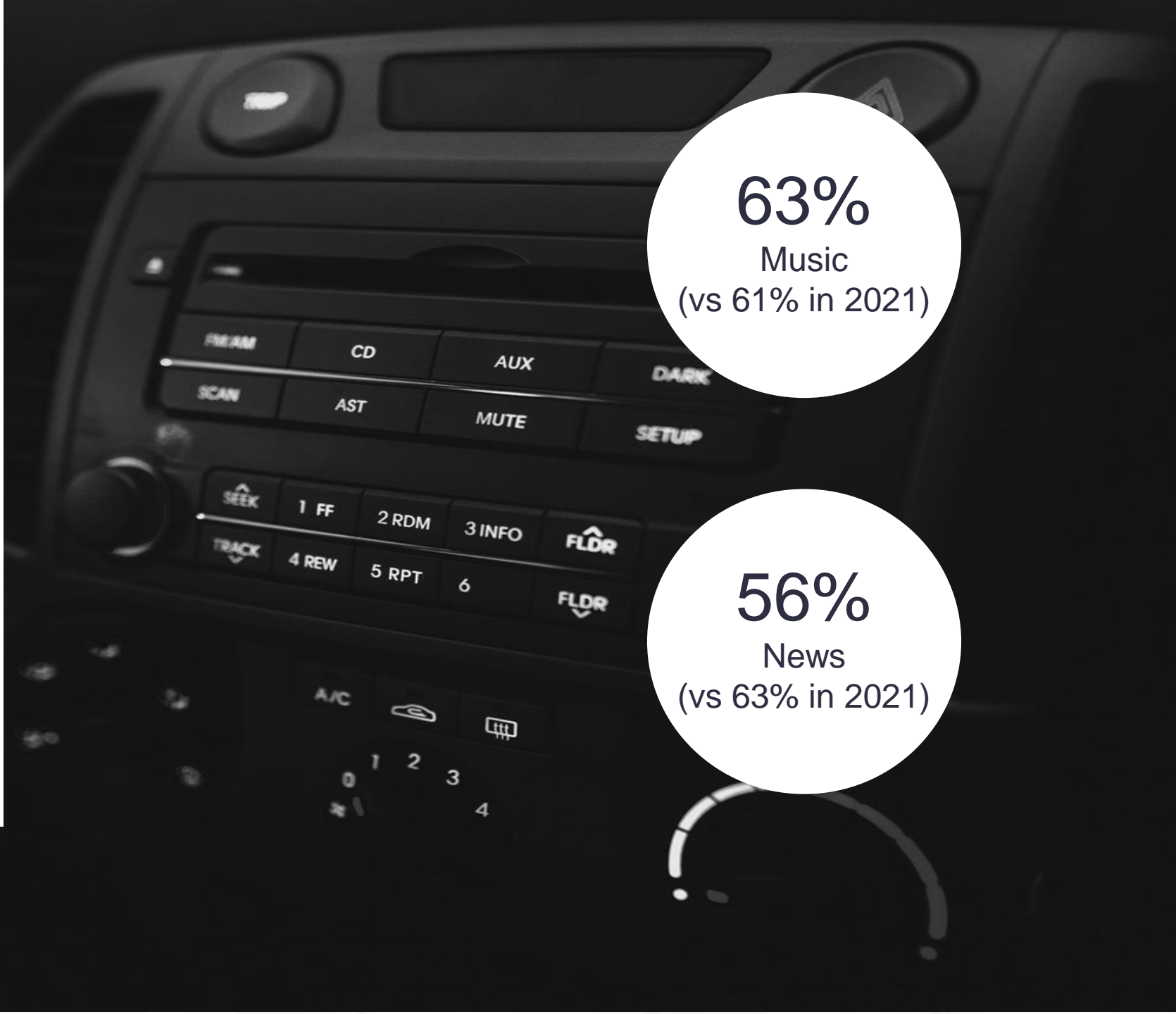
WE'RE
LISTENING TO
SLIGHTLY
MORE MUSIC
AND LESS
NEWS ON
RADIO.

63%

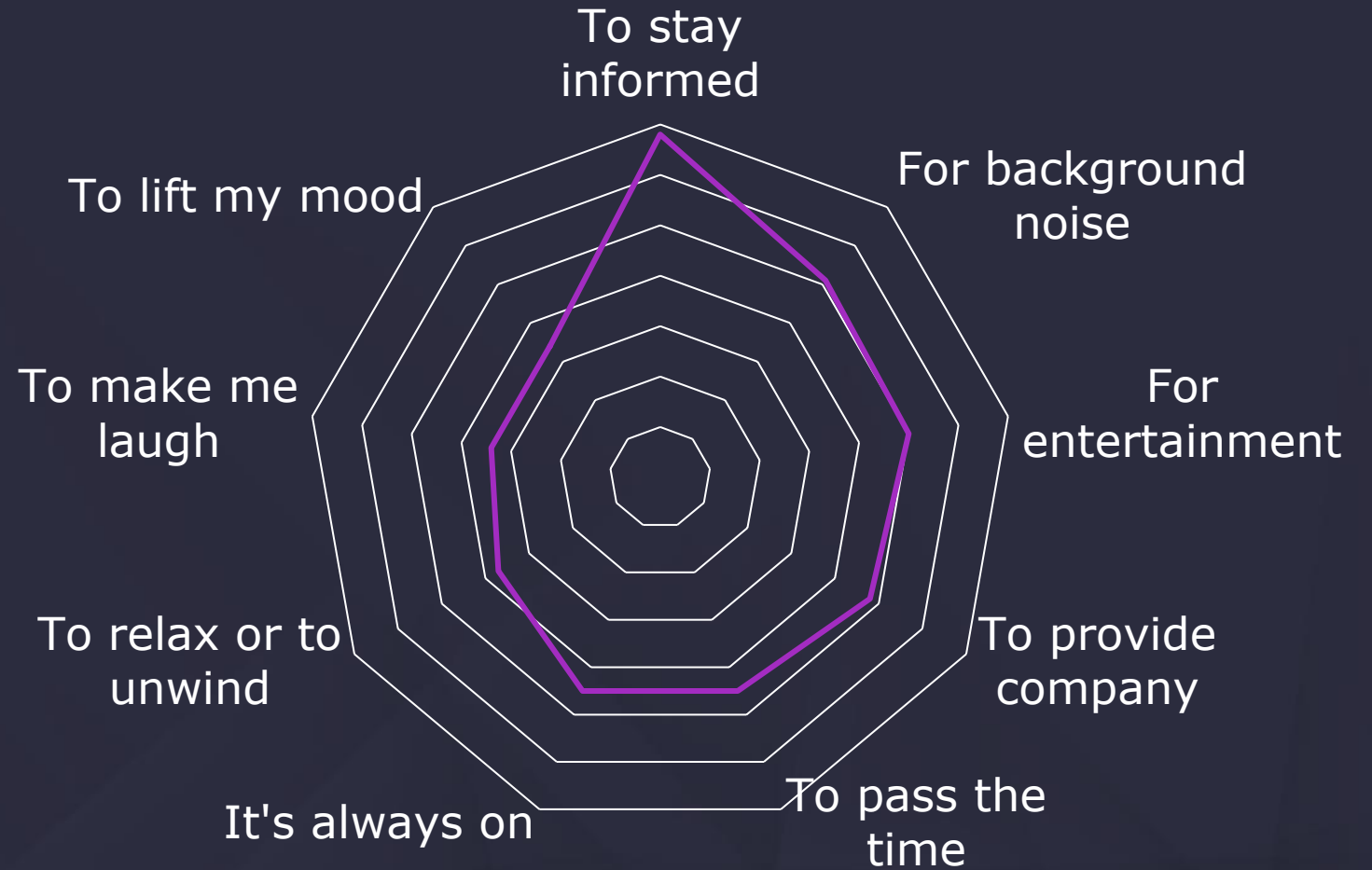
Music
(vs 61% in 2021)

56%

News
(vs 63% in 2021)



But staying informed is still a key reason for listening to the radio.



PODCAST LISTENING HAS SETTLED



74%

of people have listened to a
podcast (v 70% 2021)

55%

listen monthly
(v 54% 2021)

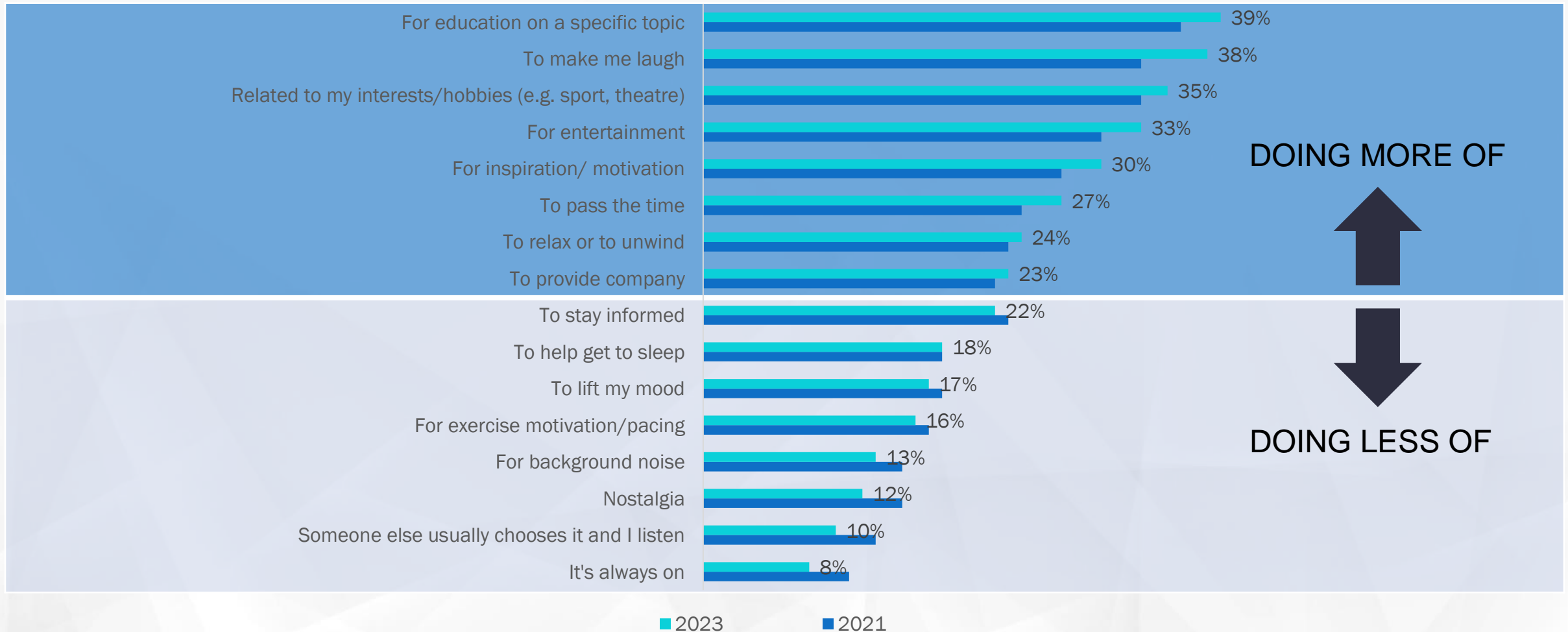
20%

Subscribe to a podcast
(v 21% 2021)



LISTENING MOTIVATIONS MORE POSITIVE COMPARED TO THE SOOTHING TONES OF 2021

Why listen to podcasts





PODCASTS WERE ACTING AS A SURROGATE FRIEND DURING COVID

54% of 18-34 year olds agreed
that their favourite podcaster felt like
a friend (2021)

Vs

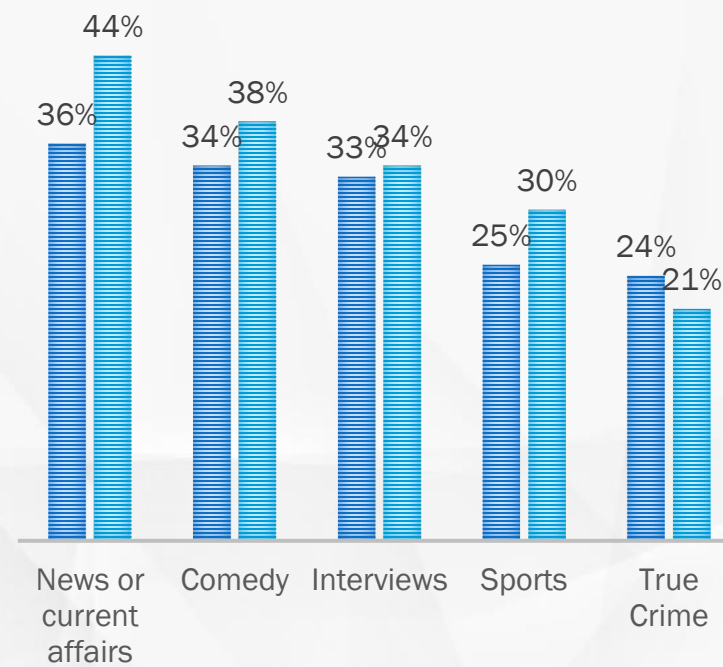
36% of 18-34 year olds (2023)
and only **24%** of all adults



INFORMED, BUT NOT TOO INFORMED

DROP IN ALL CATEGORIES EXCEPT TRUE CRIME

■ 2023 ■ 2021



LISTENING SEGMENTS



WE INTRODUCED 4 NEW LISTENING SEGMENTS IN SOUND AFFECTS 2



**Audio
Addicts**



**Purposeful
Listeners**



**Light
Listeners**



**Companion
Listeners**

16 LISTENING MOTIVATIONS AND BEHAVIOURS

I often listen to audio while doing other tasks which require concentration

I tend to put on audio for background noise

What I listen to is part of my routine

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

I take time to choose what I'm listening to

I listen to lift my mood

Having earphones in makes me feel like I have personal space

Listening through earphones makes me feel more connected than listening to something playing out loud

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

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

I regularly recommend podcasts to friends and family

I only listen to audio when I'm going somewhere

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

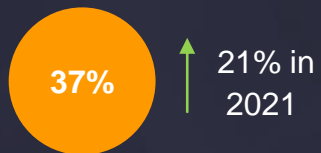
When I turn on the radio I just listen to what's on rather than choosing content

I enjoy listening but often can't remember what I was listening to

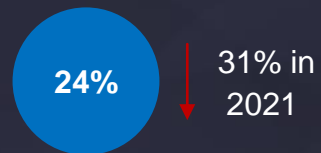
2 YEARS AND POST COVID HAVE MADE A DIFFERENCE



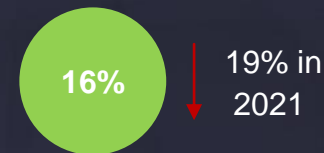
Audio Addicts



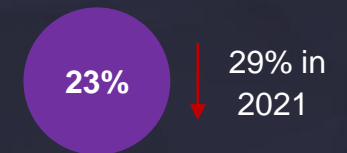
Purposeful Listeners



Light Listeners



Companion Listeners



AUDIO ADDICTS - 37%

- Overindex as male (55%) and younger
- Enthusiastic and optimistic
- Go-getters, ambitious
- Family and friends are important
- Audio is 20% of media time
- Heaviest listeners to podcasts but listen to all audio



PURPOSEFUL LISTENERS - 24%

- Overindex as female (55%) and younger
- Busy but enjoying life important
- Value for money key
- Ad avoidant and make active audio choices
- Audio is 15.4% of media time
- Music is the highest proportion of listening and feel connected through headphones
- High internet use and use of AI home assistants



LIGHT LISTENERS – 16%

- Skew slightly male (53%) and slightly older
- Most financially comfortable
- Lowest levels of listening
- Least engaged with media and audio – but heavy TV watchers
- Least open to technology and least likely to have used an AI application



COMPANION LISTENERS – 23%

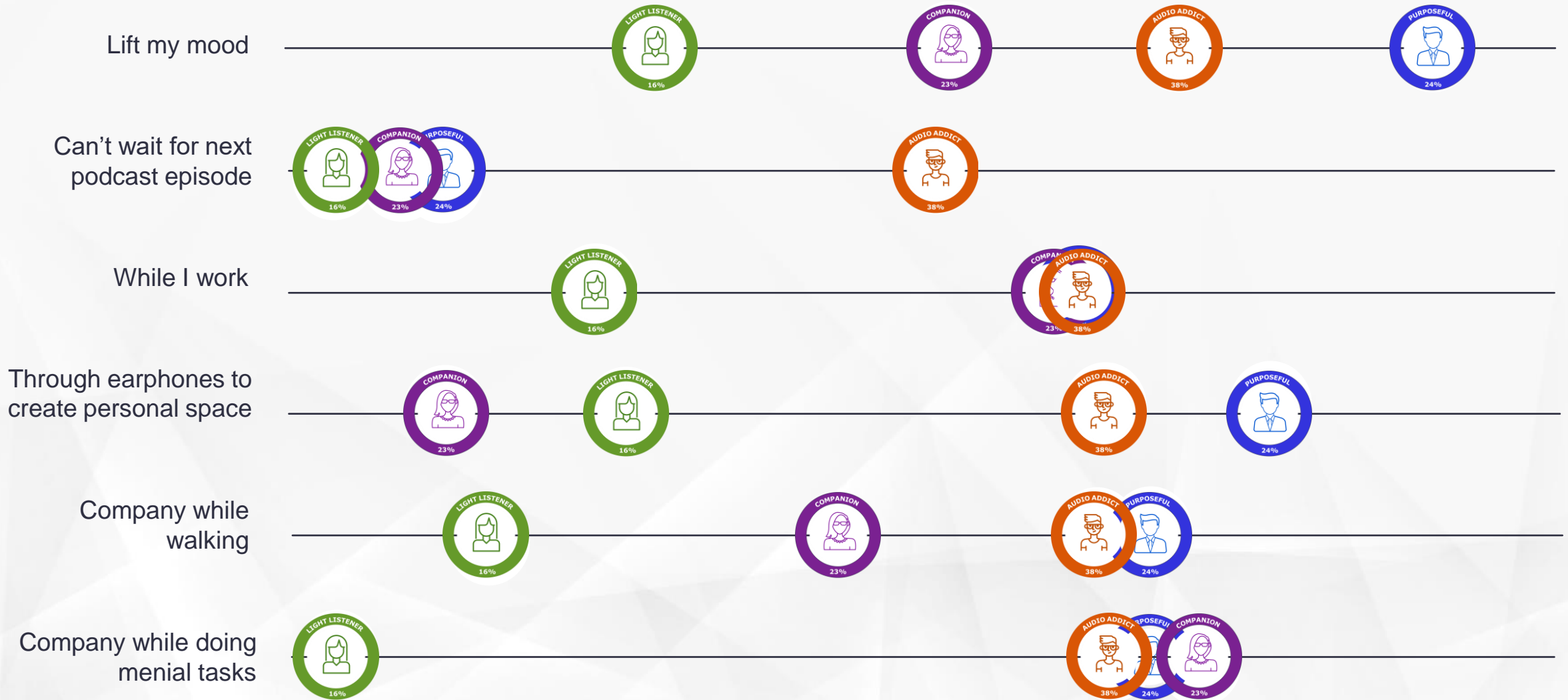
- Skews female (57%) and slightly older
- Enjoys family time
- Methodical and considered
- Value for money important
- Audio makes up 20% of media time
- Radio is particularly important to this group (14.9 hours per week)
- Don't see themselves as tech savvy but good adoption of Alexa and Google Home



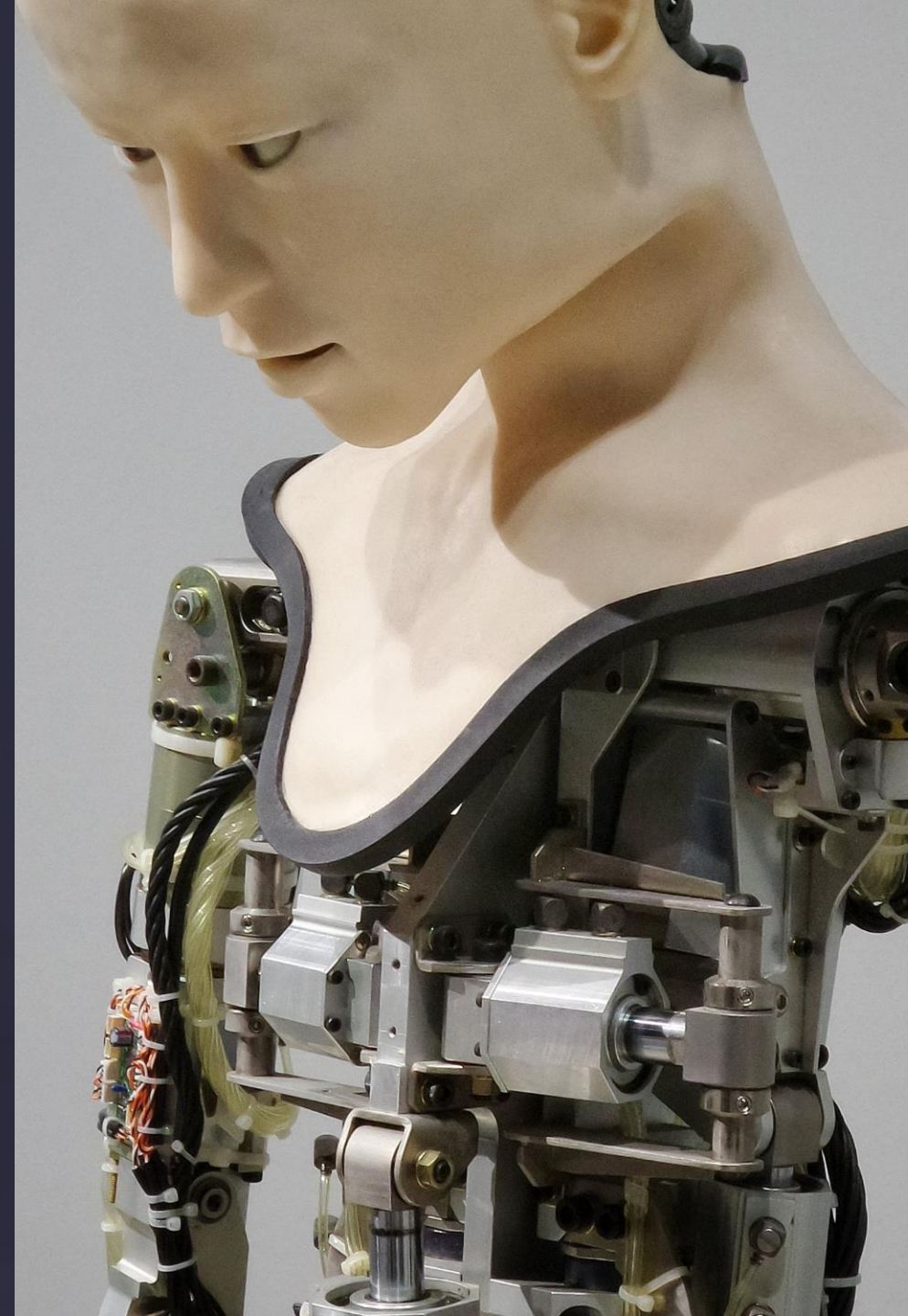
WEEKLY LISTENERSHIP



AUDIO MOTIVATION



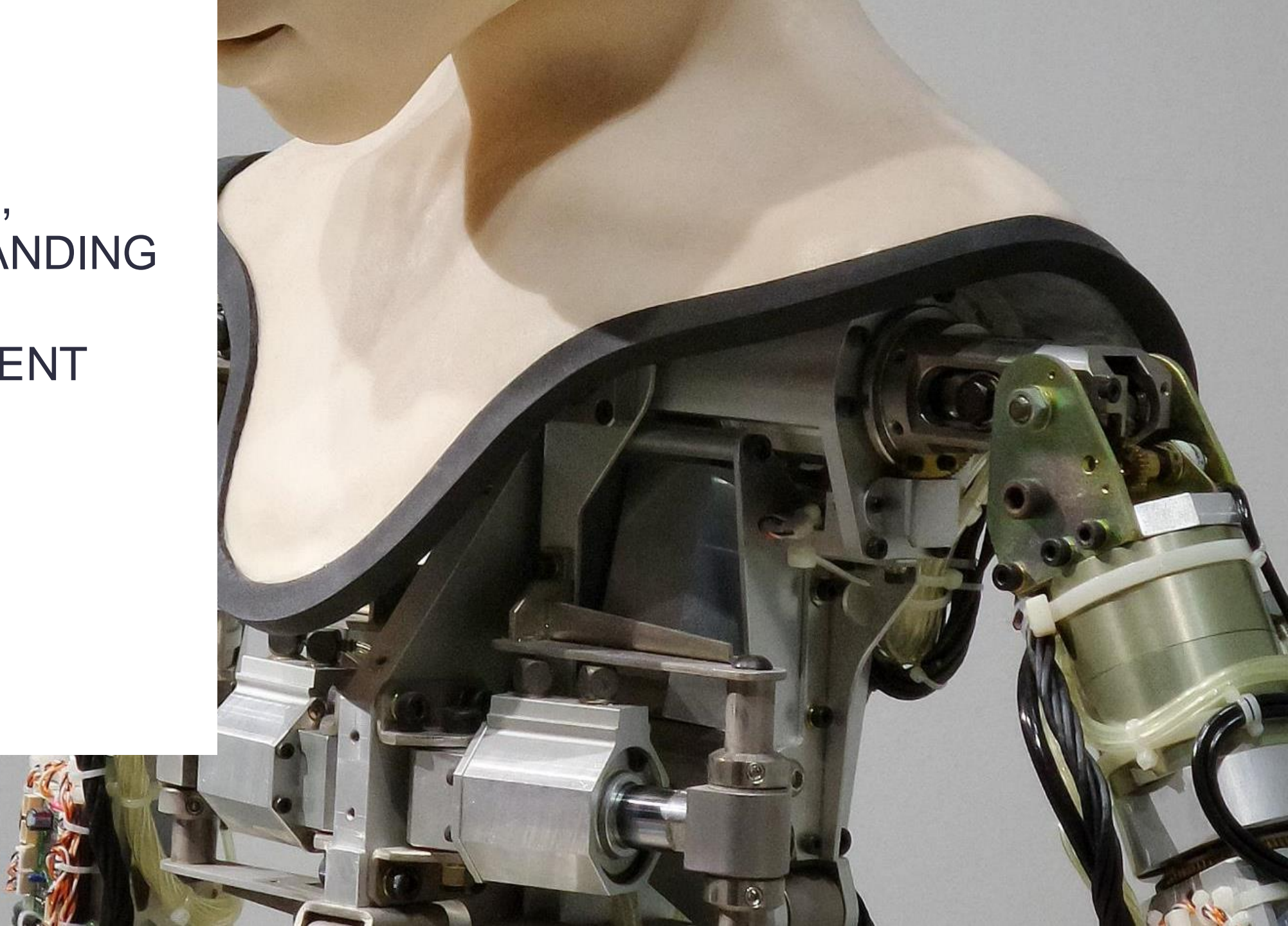
THE RAPID RISE OF AI



IN THE LAST YEAR



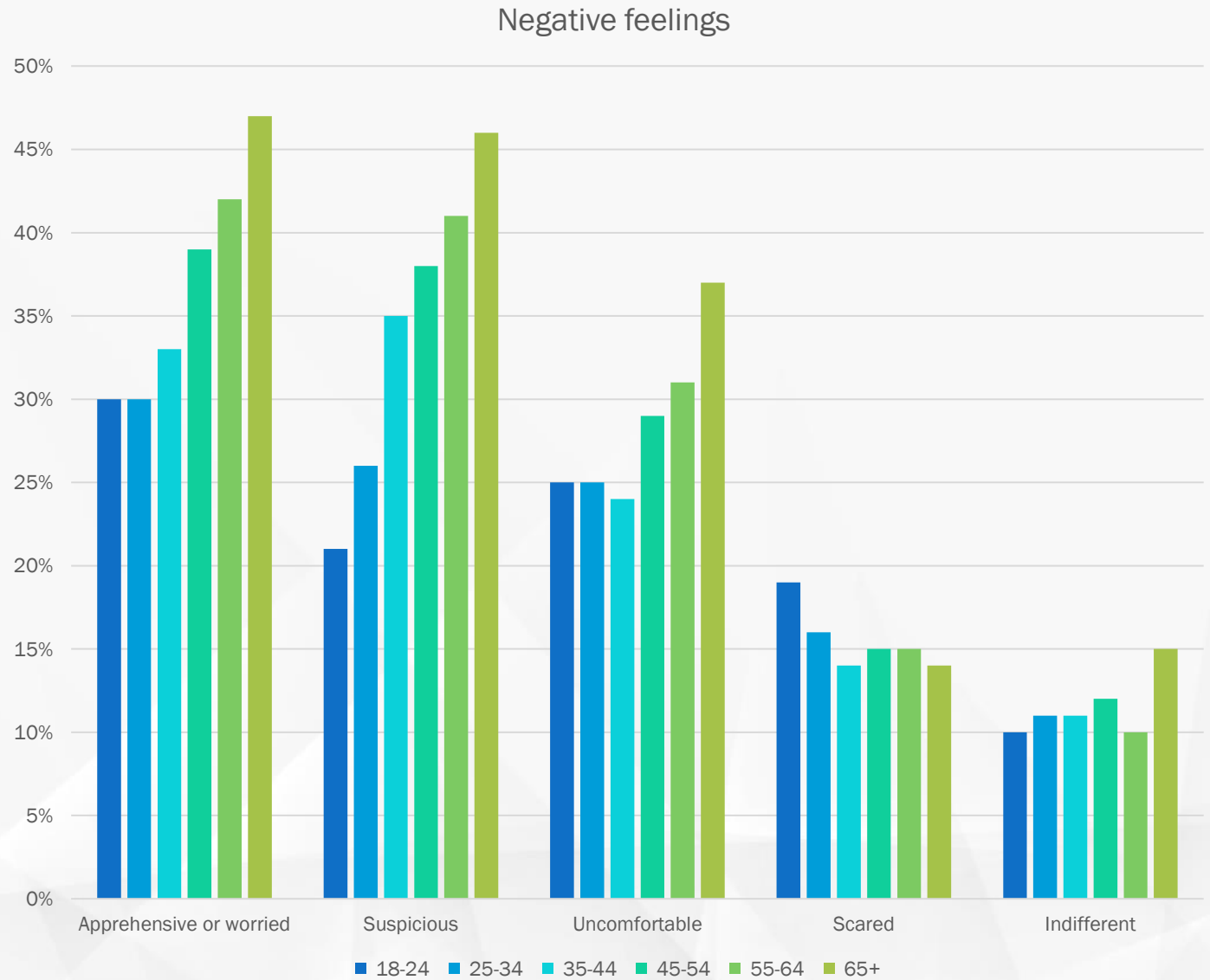
ADOPTION,
UNDERSTANDING
AND
ENGAGEMENT
WITH
AI VARIES



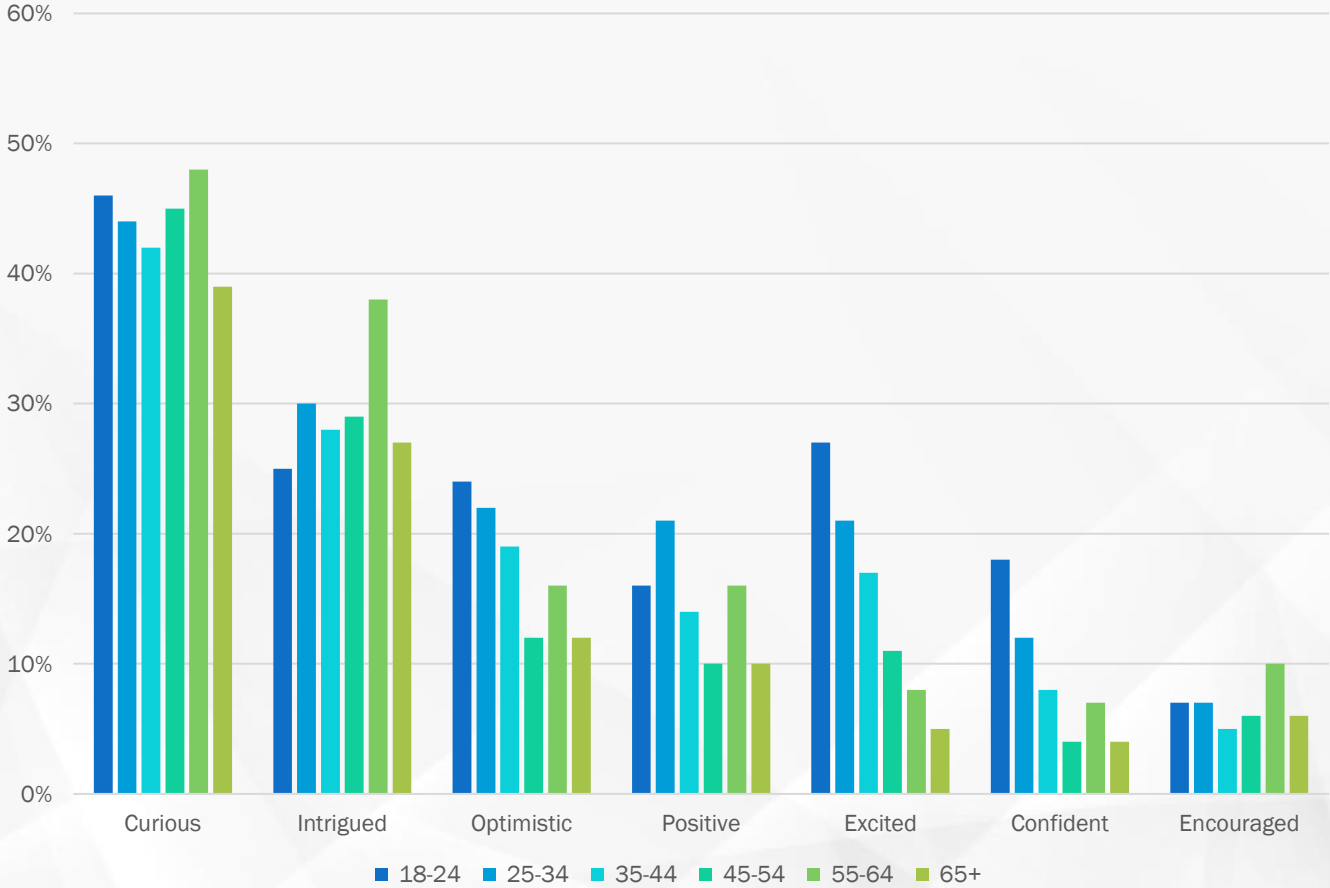
HOW DO WE FEEL ABOUT AI?



WORRIES, SUSPICION AND DISCOMFORT ASSOCIATED WITH AI INCREASE AS PEOPLE AGE

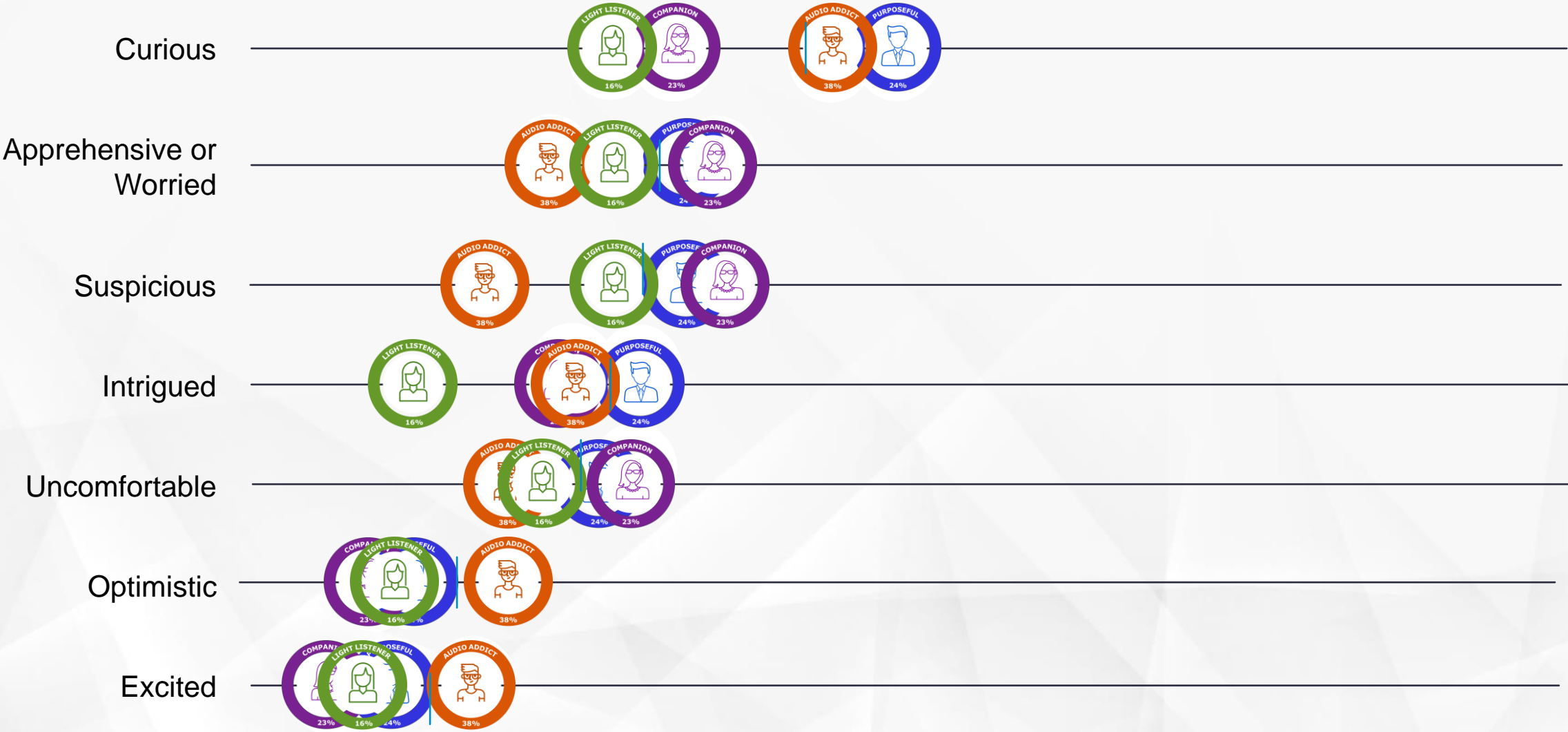


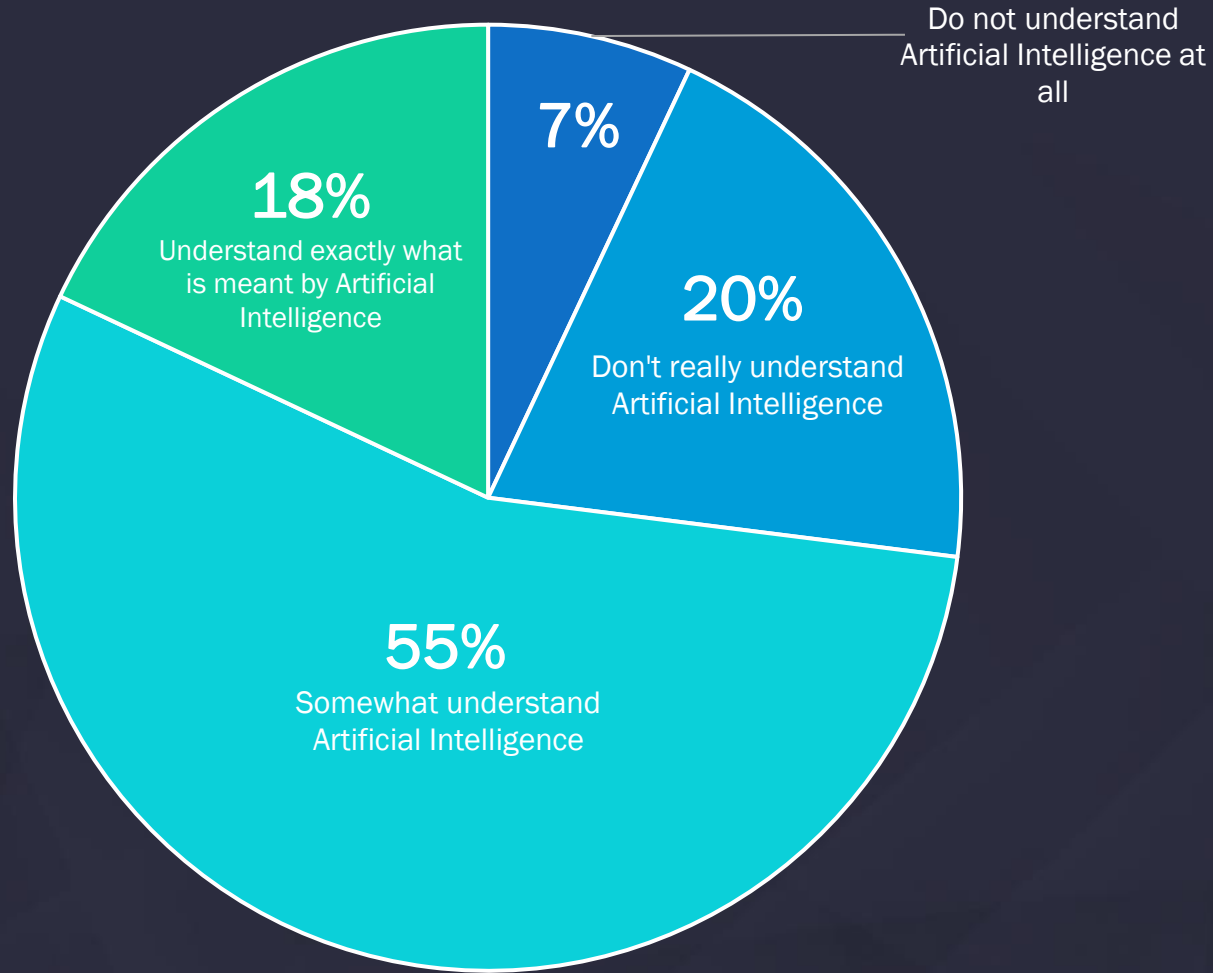
Positive feelings



CURIOSITY IS HIGH ACROSS ALL AGE GROUPINGS – WITH GREATER VARIATION IN OTHER POSITIVE EMOTIONS

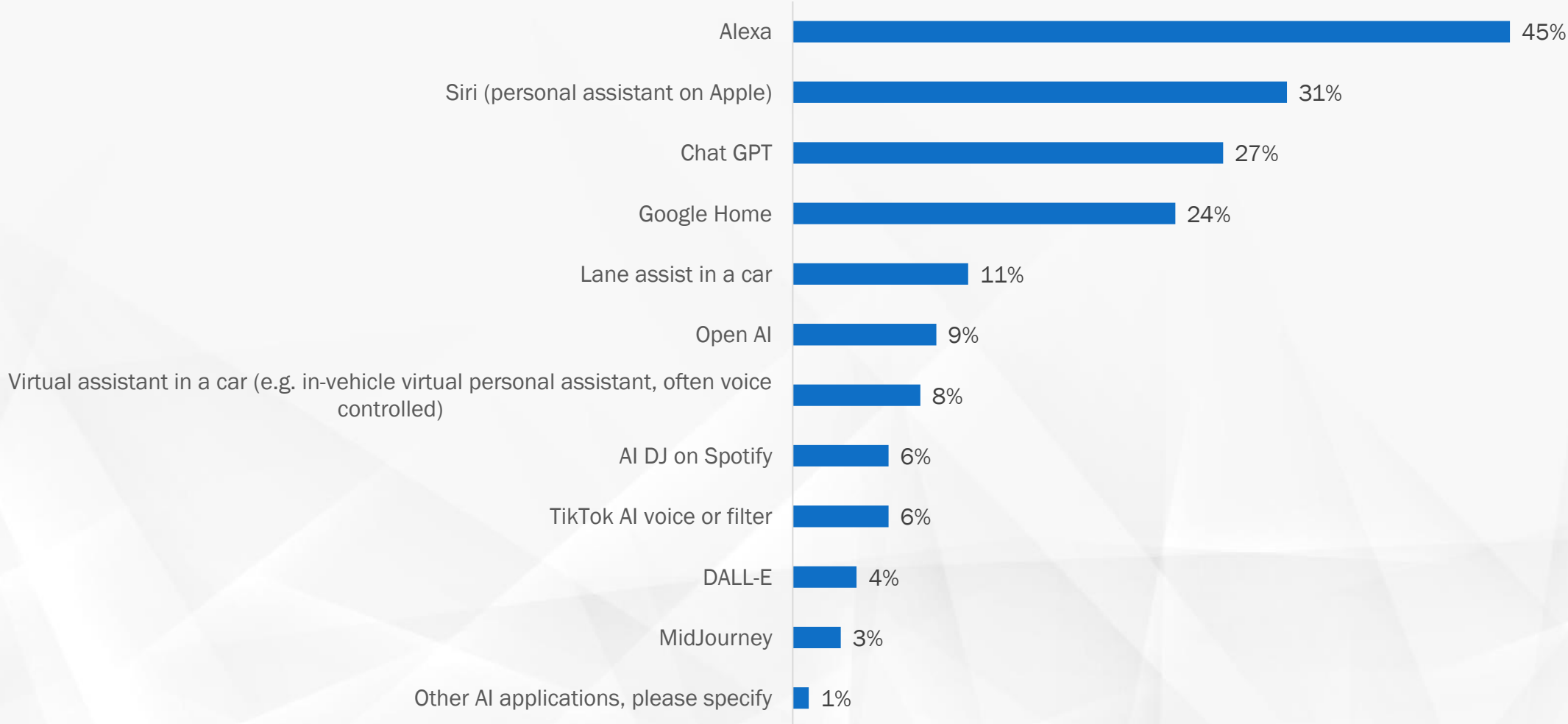
GROUPS VARY

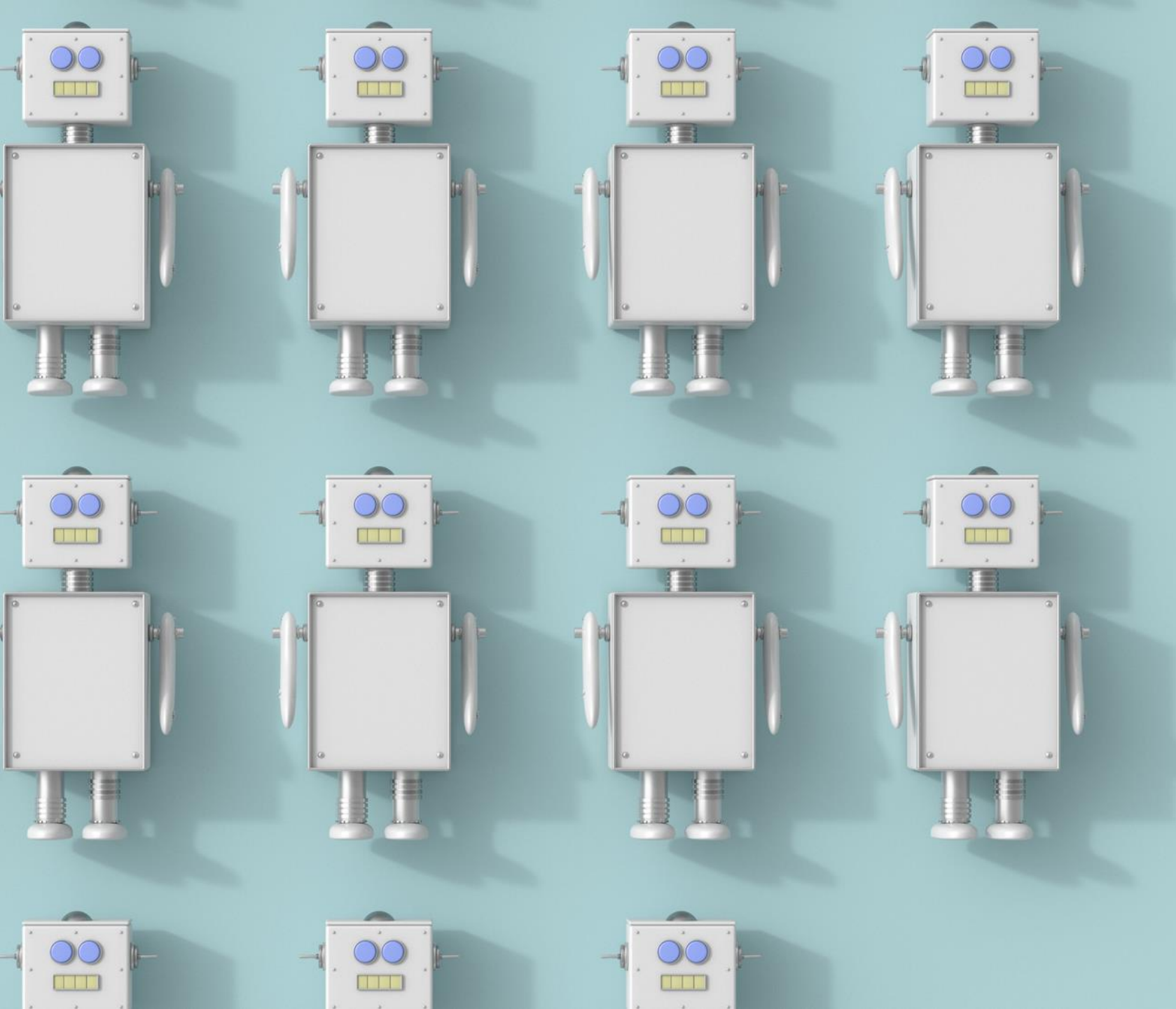




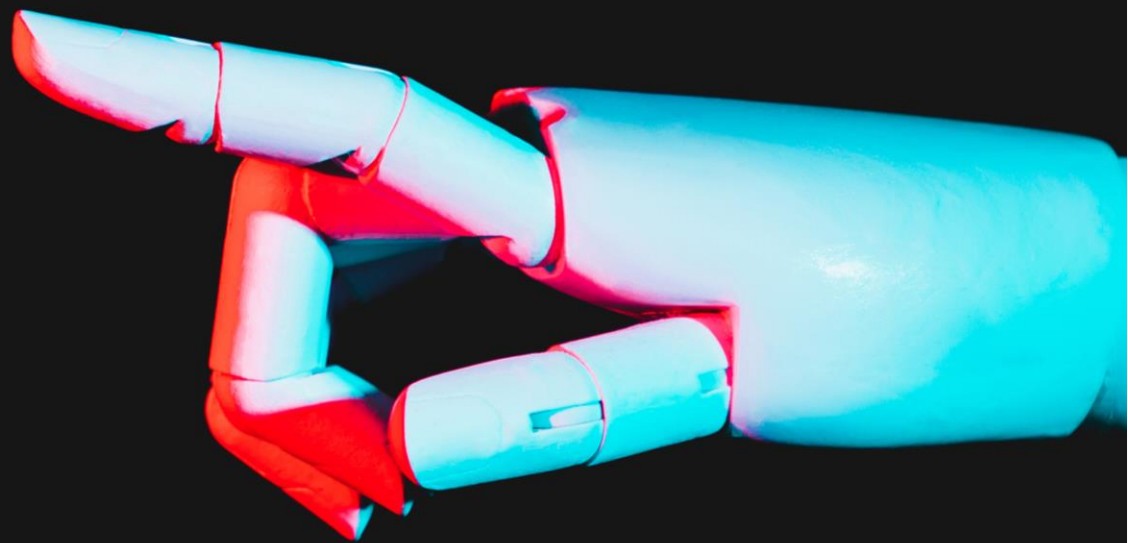
THE MAJORITY OF PEOPLE (73%) CLAIM TO HAVE SOME LEVEL OF UNDERSTANDING OF AI AND 1 IN 5 CLAIM TO KNOW EXACTLY WHAT IS MEANT BY AI.

ALEXA IS THE MOST COMMONLY USED APPLICATION OF AI, ALTHOUGH OVER A QUARTER HAVE TRIED CHAT GPT.





**BUT 23%
HAVE NEVER
USED AN AI
APPLICATION**



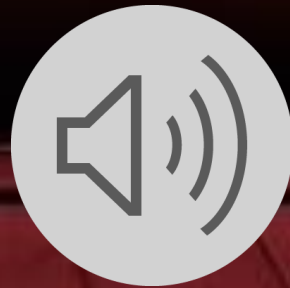
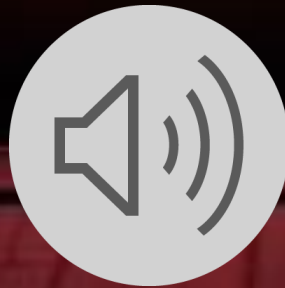
WILL AI KILL THE RADIO STAR?

WE KNOW DIGITAL (AND PODCASTS) HAVEN'T

THE EXPERIMENT

CAN PEOPLE DIFFERENTIATE BETWEEN REAL VOICES AND
AI?

ON AIR

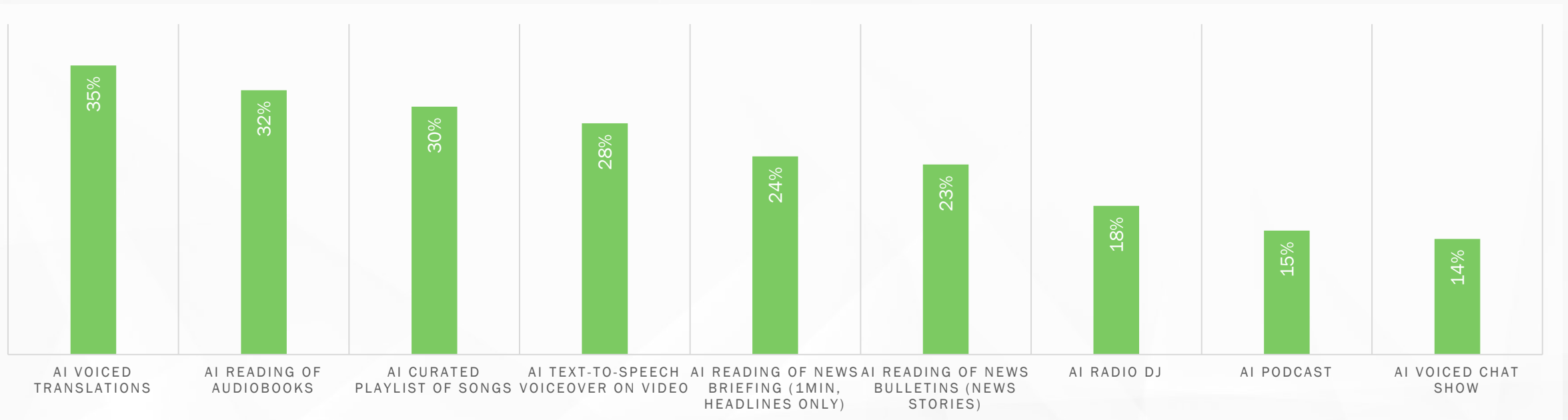


*“..was it AI generated?
Some of the voices felt
very flat”*

*“He did come across as a
bit monotone looking
back on it...having a
radio station completely
AI, I don't know if I'd pick
up on it”*

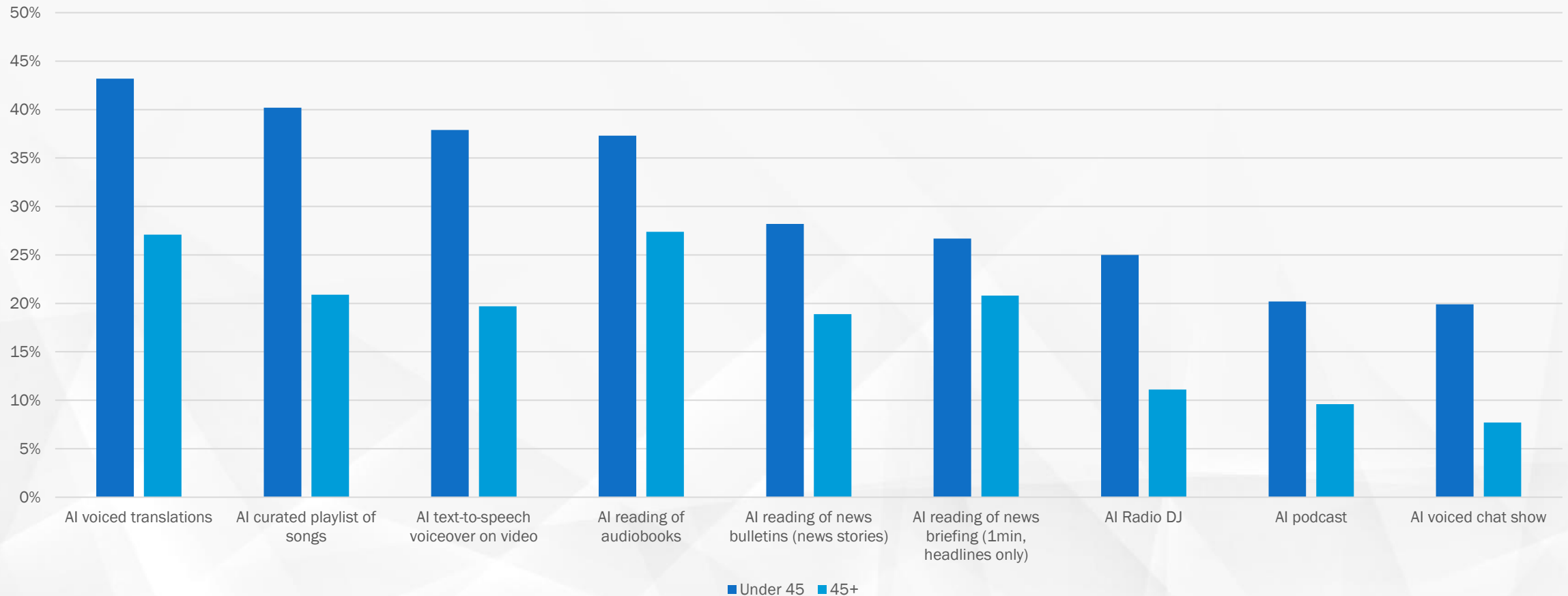
*“Whether we like it or
not AI is going to be part
of the world...I don't
think it will capture the
banter and rapport
between people on Irish
radio stations”*

TRANSLATIONS ARE THE MOST POSITIVELY VIEWED APPLICATIONS OF AUDIO AI WHILE A SIGNIFICANT PROPORTION HAVE NEGATIVE ASSOCIATIONS WITH AN AI PODCAST OR CHAT SHOW.



POSITIVE ASSOCIATIONS WITH AI APPLICATIONS HAVE A STRONG AGE SKEW.

Net Positive

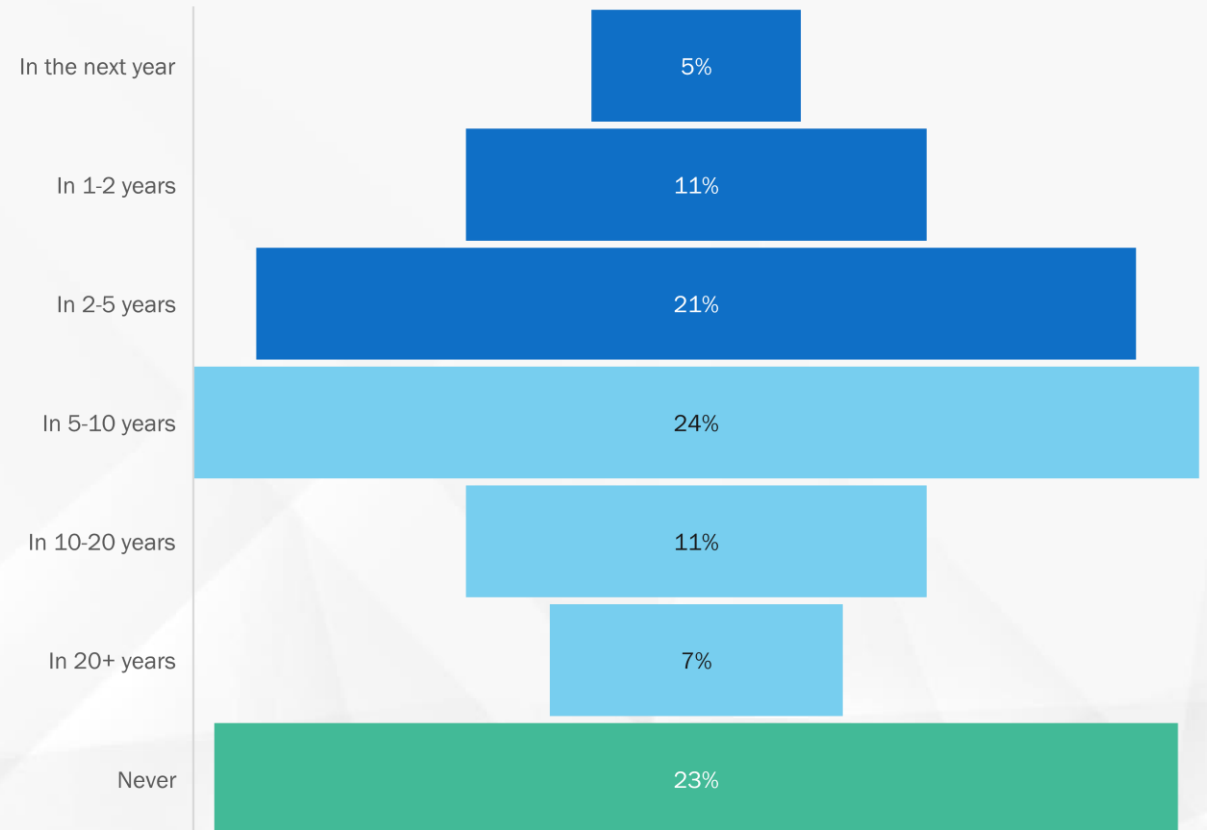


AND OUR SEGMENTS HAVE A VERY MIXED VIEW OF AI APPLICATIONS.



NEARLY ¼ DON'T BELIEVE THAT AI WILL BE ABLE TO REPLICATE HUMAN THINKING

... but 37% think AI will be able to replicate human thinking and/or behaviour in the next 5 years

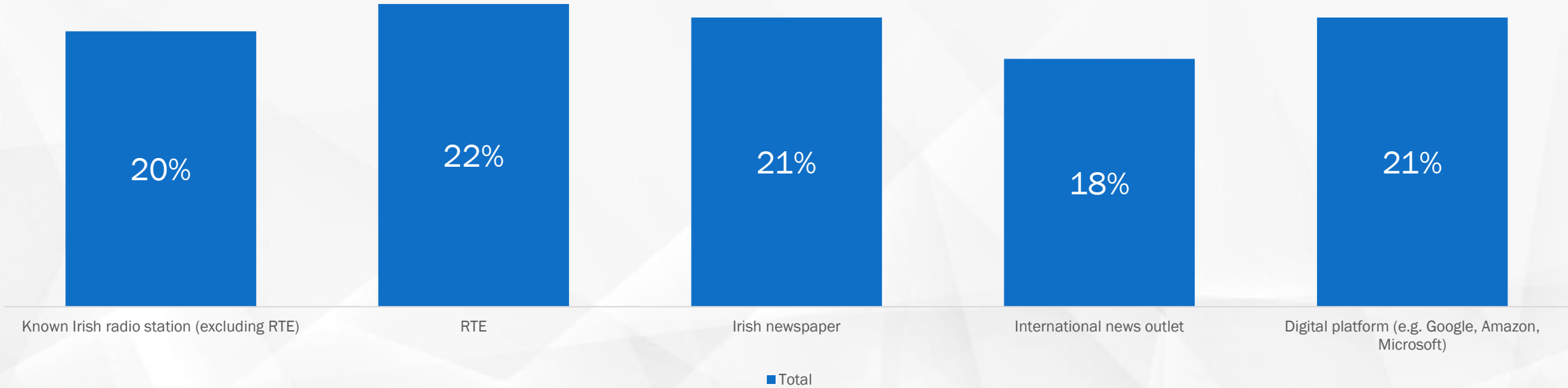


AI WILL PUT AN END TO WORK

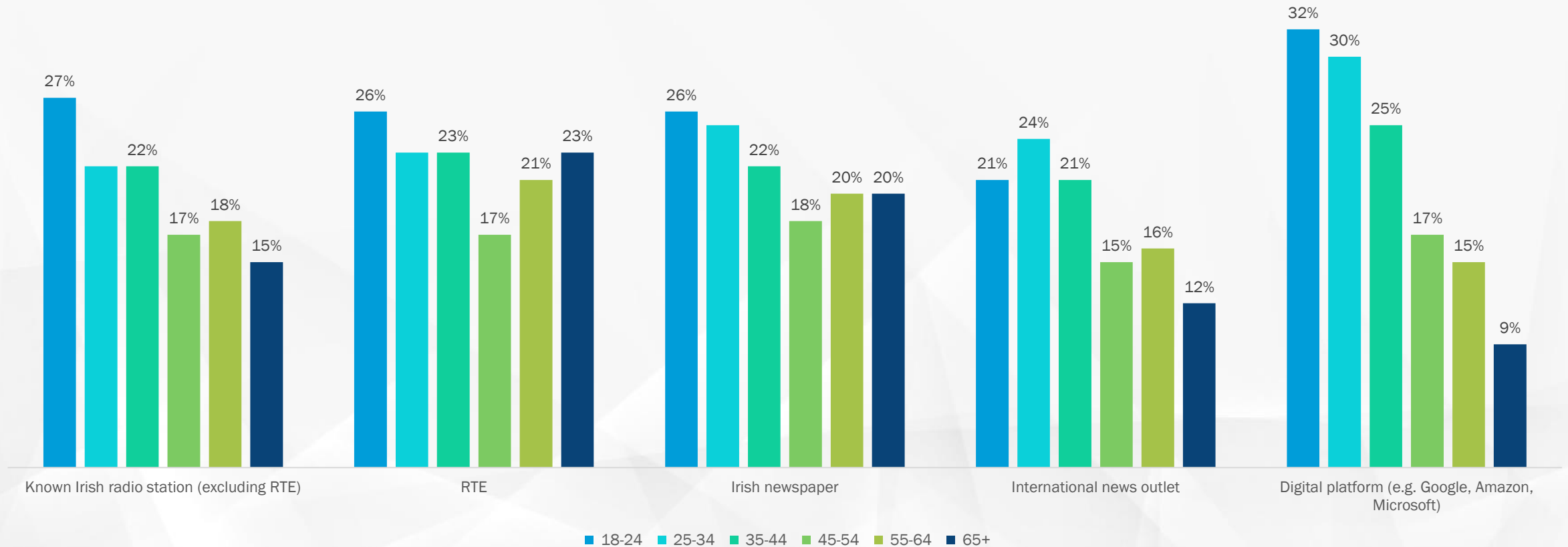


T₁ R₁ U₁ S₁ T₁

MORE LIKELY TO TRUST AI FROM IRISH MEDIA OWNERS & DIGITAL PLATFORMS



YOUNGER PEOPLE MORE LIKELY TO TRUST AI COMING FROM DIGITAL PLATFORMS RATHER THAN MAINSTREAM MEDIA

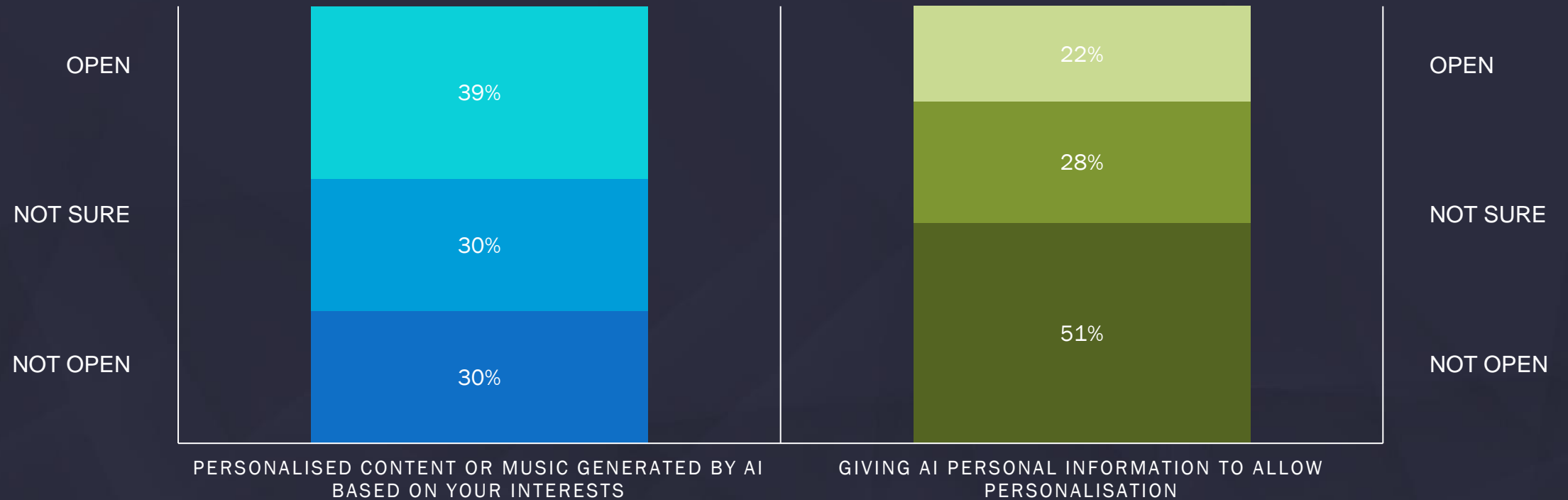




**META TOOK
DOWN 1.1BN
FAKE
ACCOUNTS IN
THE FIRST
SIXTH
MONTHS OF
THIS YEAR**

THERE IS A DISCONNECT BETWEEN COMFORT WITH PERSONALISATION AND THE THOUGHT OF PROVIDING AI WITH PERSONAL DATA TO ALLOW IT

TO WHAT EXTENT ARE YOU OPEN TO THE FOLLOWING



COMPLEX FEELINGS WHEN IT COMES TO PERSONALISED AUDIO SOLUTIONS

“AI is everywhere as far as I can see...I think we’re using AI a lot more than we think we are...people will lose job because of it...but there are so many huge things coming down the line”

*“I want to be the one that picks them [music genres]”
“how far with the self-learning go? And what will it do?”*

“great for data analysis...open to AI station...playlist pulling statistics from country or county”

“Privacy, but also I want to think my own thoughts and come up with my own solutions”





SO.....

**HAS AI KILLED
THE RADIO
STAR?**

SO.....

**HAS AI
KILLED THE
RADIO STAR?**



...AI HAS NOT KILLED THE RADIO STAR; INSTEAD, IT HAS TRANSFORMED THE INDUSTRY IN VARIOUS WAYS. AI AND AUTOMATION TECHNOLOGY HAVE BEEN INTEGRATED INTO RADIO BROADCASTING TO IMPROVE VARIOUS ASPECTS OF CONTENT PRODUCTION AND DISTRIBUTION...

...SO, WHILE AI HAS CHANGED THE WAY RADIO OPERATES, IT HAS NOT "KILLED" THE MEDIUM. RADIO CONTINUES TO BE A POPULAR AND RELEVANT FORM OF ENTERTAINMENT AND COMMUNICATION, AND AI HAS PLAYED A ROLE IN HELPING IT ADAPT TO NEW TECHNOLOGIES AND AUDIENCE PREFERENCES.



RADIO RESILIENCE





A CAPTIVE AUDIENCE

A close-up portrait of a man with light brown hair and a beard, wearing black-rimmed glasses and large white over-ear headphones. He has his eyes closed and a slight smile, suggesting he is enjoying music. He is dressed in a dark suit jacket, a light-colored collared shirt, and a dark tie. The background is softly blurred, showing green foliage and a warm, golden light source, possibly a window or a lamp, creating a bokeh effect.

LET ME ENTERTAIN YOU



TRUST

THE AI OPPORTUNITY



AUDIENCE

- TRANSLATION
- DIVERSITY
- PERSONALISATION



PRODUCTS

- EXTENSIONS
- MICRO STATIONS
- REFINEMENT AND EFFICIENCY



pridevibes

QUESTIONS?

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