

The Impact of Covid 19 on Ireland's Independent Radio Sector

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**Learning
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Skillnet

The Impact of Covid 19 on Ireland's Independent Radio Sector

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Foreword

1. Foreword

Dr Colm Kearns, *FuJo Institute*
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Crisis reveals. It overturns apparent certainties and complacent platitudes to reveal the true strengths, vulnerabilities and priorities of a culture. The Covid-19 pandemic was a harrowing experience for Ireland, but it was also a revealing one. Many sectors of Irish society and economy demonstrated hitherto unimagined nimbleness and resilience in performing important services in the midst of upheaval, uncertainty and considerable stress. Equally, important and well-loved staples of Irish life were revealed to be more vulnerable than previously assumed and are in need of swift support to endure the crisis.

In Independent Radio, we see both sides of this coin.

Ireland has long enjoyed a rich and diverse radio landscape which is treasured by listeners.

Over two thirds of Irish people listen to independent radio every day, and continued to do so during the pandemic. In a crisis, listeners across the country turned to independent radio not only for reliable and trustworthy information on the pandemic, but also for the comfort, companionship and entertainment the stations always provided for them. Independent radio's fortitude and flexibility in rising to this role despite the considerable financial and emotional strain stations and staff were under is to be commended.

However, there is no doubt that the sector felt the impact of the pandemic. Advertising revenues plummeted with the lockdown-enforced closure of local businesses. The mental health of staff suffered considerably because of the uncertainties and anxieties

aroused by the pandemic. And the pandemic accelerated the destabilising effects that loosely regulated social media platforms have had on journalism.

In the short term, policy makers responded to this crisis, providing support for the sector and amending existing funding schemes to account for the unique circumstances of the pandemic.

But the impact of the pandemic will reach far beyond the short term.

If the vitality and variety of the Irish radio landscape is to be sustained, or even enriched, significant re-evaluation of existing funding structures is needed.

What this crisis has revealed is a sector that is valuable but fragile. Its strengths are clear: it performs a vital service to the Irish public in fostering community amid uncertainty, educating in the face of misinformation, and entertaining in the wake of a climate of fear. Its vulnerabilities are undeniable: competition from lightly regulated social media, declining revenue as a result of the pandemic, and staff anxiety as a result of both developments. What remains to be seen is whether policy makers consider it a priority to adequately adapt supports to the sector in the face of this upheaval.





Executive Summary

2. *Executive Summary*

Independent radio plays a crucial role in Ireland's media eco-system. Not only is it enormously popular, but it also fulfils a public service remit crucial to social cohesion and public trust. It provides the Irish public with varied entertainment, trustworthy news and a sense of companionship. Research points to over 70% of the Irish population listen to independent radio daily.¹

However, the Covid-19 pandemic has exacerbated the significant financial pressures that the independent radio sector already faces as a result of the disruption to

its business model caused by the rise of digital media. Simultaneously, the pandemic has also illustrated the vital importance of the ability reliable media with public trust to disseminate key information clearly and widely.

This report investigates the Irish independent radio landscape in the wake of the pandemic by collecting the experiences of station CEOs and other relevant figures via survey and interview. Through this process, it provides key insights into the impact of the pandemic on Irish independent, the sector's response, and its most pressing concerns.

In brief, they are as follows:

- The BAI Sound and Vision fund was crucial to the operation of independent radio during the pandemic, but needs to better take account of the varied resources across the sector.
- Government supports have largely aided in the short-term problems caused by the pandemic, but longer term issues remain unaddressed.
- Radio staff creativity rose during the pandemic.
- The pandemic has had a significant toll on radio staff's mental health, exacerbating the pressures journalists already face.
- Radio staff and Learning Waves rose to the challenges of the pandemic.
- Despite difficult working conditions and financial constraints, independent radio stations increased their talk/information/discussion output during the pandemic.
- Listeners turned to independent radio for trusted news about the pandemic and local radio played a key role in dispelling pandemic-related misinformation.
- Government understands the value of independent radio to Irish society, but does not understand the sector's concerns.
- Financial support is the most pressing need of Irish independent radio in the wake of the pandemic.
- It is vital that the Future of Media Commission provide the sector with a viable path forward.

¹ 'Submission from the Independent Broadcasters of Ireland' (2021) The Future of Media Commission

It is evident that Irish independent radio rose to the challenges of the pandemic, providing listeners with reliable and trustworthy information on the crisis, in addition to offering entertainment and relief from the anxieties it aroused.

Despite the valuable public service that the sector provided during the pandemic, it was by no means immune from the significant economic repercussions of the crisis. Most stations were forced to reduce staff numbers, and those staff that remained employed faced significant stress in appropriately covering the pandemic while coping with the uncertainty it caused.

To alleviate these stresses and facilitate the sector in continuing to play a key role in furnishing Irish society with a robust and reliable public service media, policy makers must revise existing funding and communication structures. There is a pressing need for Irish media regulation to reflect a rapidly changing landscape. Full account must be taken of the diversity of what constitutes public service media in Ireland, so as to recognise and support the valuable work done by the independent radio sector. Fundamentally, the Covid-19 pandemic has illustrated and accelerated the need for more appropriate Irish media regulation and funding.



Introduction

3. *Introduction*

The Covid-19 pandemic has disrupted the fabric of Irish society on an unprecedented scale. It has not only posed a danger to human lives, but also to many longstanding institutions and practises. Concurrently, however, it also awakened a renewed interest in - and appreciation for - many of these endangered fixtures of Irish society. Foremost among these was radio. Irish radio has long enjoyed markedly higher listenership figures than many of its European counterparts,² but the pandemic saw even greater numbers turn to national and local radio for information, diversion and companionship.³

However, the economic impact of the pandemic – most prominently the closures of non-essential businesses during periods of lockdown – was severely felt by the Irish independent radio sector. Locally based advertising revenue (a crucial source of funding for local and regional stations) fell considerably and most stations were forced to resort to cutting staff in order to remain financially viable. Despite high listenership, Irish independent radio has been experiencing financial pressure in the decade preceding the pandemic owing largely to the rise of social media and the subsequent disruption in advertising revenue this development has caused.

While there are notable economic factors to be considered in devising potential strategies to address the problems the sector faces, the cultural and social benefits of Irish independent radio should not be neglected in such discussions. The Independent Broadcasters of Ireland (IBI) have long argued that their stations perform a vital public service, and the importance of this role was sharply illustrated during the pandemic when the World Health Organisation (WHO) argued for the importance of battling the 'infodemic' of misinformation surrounding Covid-19.

Engaging, responsible and trustworthy news sources are key to combatting misinformation effectively. The IBI has consistently argued that within Ireland, independent radio fulfils such a role, asserting that stations provide

“a forum for news, information, local sports coverage, discussion, debate and interaction that is not replicated in any other media format in this country”⁴

and have “become an integral part of local identity in every county in the country.” Indeed, many studies have attested to the role local media plays in ensuring social cohesion and fostering tolerance.⁵

² Mediathique (2017) 'A report on market structure, dynamics and developments in Irish media' Broadcasting Authority of Ireland https://www.bai.ie/en/media/sites/2/dlm_uploads/2018/04/180410-Mediathique-Report.pdf

³ Slattery, L. (2020) 'Covid-19 crisis prompted huge surge in radio listenership, first figures show' The Irish Times <https://www.irishtimes.com/business/media-and-marketing/covid-19-crisis-prompted-huge-surge-in-radio-listenership-first-figures-show-1.4401069> 5 November 2020

⁴ Harte, G. (2019) 'The Future of Public Service Broadcasting on Independent Radio' Independent Broadcasters of Ireland

⁵ Nettlefold JE. (2019) 'Listening at the local level: the role of radio in building community and trust.' Media International Australia 172(1): 74-88

Therefore, it is useful to consider the Covid-19 pandemic a flashpoint in the history of Irish independent radio, highlighting the sector's prominent place within Irish society and the public role it fulfils, while also illustrating the imminent danger it faces. It is an important moment to take stock and explore the issues facing the sector and how they may be effectively addressed to ensure its future. Mindful of the significance of this moment for the future of the sector, this study began with three key research questions in mind:

1

What has the Covid-19 pandemic demonstrated about the role of independent radio in Irish society?

2

What impact has the pandemic had on the sector?

3

How best can the sector be supported in light of the pandemic?

Through addressing these questions, this report aims to provide a concise illustration of the value and concerns of Irish independent radio in light of the pandemic, and a solid foundation on which to develop strategies and policies for the sector in post-Covid Ireland.

A dark blue, monochromatic background image. On the right side, there is a close-up of a microphone with a fine mesh grille. Below the microphone, a cable connector is visible, with some text like 'XLR' and 'NEUM' partially legible. In the center, a large, white, stylized number '4' is superimposed. At the base of the '4', the word 'Background' is written in a bold, dark blue, sans-serif font.

4 Background

4. *Background*

The Covid-19 pandemic has upturned the accepted truths and reliable routines of media industries across the world.

Irish independent radio is no exception to this upheaval. The industry has been an active and important part of Irish society with 3 in 4 Irish adults listening to local radio stations.⁶ However, lockdown measures initiated to address the pandemic had a significant effect on small and local businesses, which, in turn, led to a significant decline in the advertising revenue on which Irish independent radio is so dependent given existing funding and regulatory structures. This has resulted in many stations being forced to reduce staff numbers, thus increasing the strain of providing reliable and regular coverage of one of the most significant crises in modern history.

The sector was already under pressure owing to the distorting effects of digital media corporations on the media market. Without the degree of public funding afforded to national broadcasters, Irish independent radio is facing an increasingly uncertain future, despite arguments that it provides a complimentary role to state funded broadcasters in providing the country with a robust and trustworthy public service media (PSM).⁷

Indeed, the PSM model is interwoven with notions of national and local community. It

positions media not merely as a diversion, but as a fundamental part of the community. PSM aim to educate as well as entertain and provide a platform for culturally and socially significant issues that might go otherwise under reported by more commercially minded media outlets. The Council of Europe asserts that PSM “are particularly suited to foster pluralism and awareness of diverse opinions, notably by providing different groups in society with an opportunity to receive and impart information, to express themselves and to exchange ideas. They can contribute greatly to the promotion of social cohesion, cultural diversity and pluralist communication accessible to everyone.”⁸ Broadcasters fulfilling the PSM model go beyond solely being governed by commercial concerns in platforming programming that performs a significantly beneficial role to wider society.

As media markets further liberalise and online technology advances, however, debates concerning the continuing relevance and remit of PSM have escalated. Media-technology platforms such as Google, Facebook, Amazon, Apple and Netflix have provided audiences with unprecedented range of choice in content and a greater degree of interactivity than had been possible in previous mediums. In the face of such alternatives, PSM across Europe face declining revenue streams and, in some cases, active hostility from policy makers and governments. As Soroka et al note “Public broadcasters have been subject to a range of

⁶ Amarach Research (2020) 'The Future is Local,' IRS+

⁷ Rafter, K (2015) 'Television Licence Fee: A report prepared by Kevin Rafter for the Independent Broadcasters of Ireland' Independent Broadcasters of Ireland

⁸ The Council of Europe (2017) 'Public Service Media' <https://rm.coe.int/leaflet-public-service-media-en/1680735c27>

negative stereotypes related to inefficiency, aloofness, and pretension.”⁹ In the UK, for example, the government recently threatened to withdraw the BBC's license fee.¹⁰ There appears to be an underlying assumption that digital media and streaming platforms now largely fulfil the role of PSM, rendering traditional outlets obsolete.

Defenders of PSM argue that it plays a role a societal role that is not only not fulfilled by emergent commercial alternatives, but is also crucial to the long term health of national and local communities. In addition to the afore-mentioned assertions with regard to PSM's potential to foster social cohesion and cultural diversity, the Council of Europe have also written that “public service media are an important public source of unbiased information and diverse political opinions.” Conversely, digital media platforms have frequently been criticised as a prime cause of political polarisation and the proliferation of misinformation.¹¹ Thus while some have rushed to deem commercially-minded international internet media platforms as the natural successor to the PSM model, there clearly remains a crucial need for publically minded media rooted in community ethos.

The importance of the PSM model was starkly illustrated by the Covid-19 pandemic.

Such was the proliferation of rumours, misinformation and scaremongering concerning the virus that the WHO cited the need to combat this infodemic, urging UN member states to develop robust strategies for distributing trusted information and swiftly dispelling misinformation.¹² During the onset of initial lockdown measures in Spring 2020, audiences across Europe tuned into PSM in record numbers.¹³

In the months since, however, online misinformation concerning the pandemic has remained a significant concern.

Furthermore, despite audience increases, the pandemic has seen PSM face significant challenges, whether they be the logistical issues of attempting to operate under social distancing guidelines or the emotional strain faced by staff continually confronted with the latest news of the devastation wrought by the virus.

In such a climate, public funding is all the more key to PSM. In Ireland, PSM is funded by the television license fee. The vast majority of license fee revenue is entrusted to state broadcaster, RTE. A study of the impact of public service broadcasters on audience awareness of current affairs and significant issues conducted across six countries found that not only does PSM heighten awareness of such issues when compared with commercial alternatives, but

⁹ Soroka, S., Andrew, B., Aalberg, T., Iyengar, S., Curran, J., Coen, S., Hayashi, K., Jones, P., Mazzoleni, G., Woong Rhee, J., Rowe, D., and Tiffen, R. (2013) 'Auntie Knows Best? Public Broadcasters and Current Affairs Knowledge.' *British Journal of Political Science* 43(4): 719-739.

¹⁰ Shipman T (2020) No 10 tells BBC licence fee will be scrapped. *The Times*, 16 February 2020.

¹¹ Kouzy, R., Abi Jaoude, J., Kraittem, A., El Alam, M. B., Karam, B., Adib, E., Zarka, J., Traboulsi, C., Akl, E. W., & Baddour, K. (2020). 'Coronavirus Goes Viral: Quantifying the COVID-19 Misinformation Epidemic on Twitter.' *Cureus*, 12(3).

¹² WHO, UN, UNICEF, UNDP, UNESCO, UNAIDS, ITU, UN Global Pulse, and IFRC (2020) 'Managing the COVID-19 infodemic: Promoting healthy behaviours and mitigating the harm from misinformation and disinformation' <https://www.who.int/news/item/23-09-2020-managing-the-covid-19-infodemic-promoting-healthy-behaviours-and-mitigating-the-harm-from-misinformation-and-disinformation> 23 September 2020

¹³ European Broadcasting Union 'COVID-19 crisis: PSM audience performance', 16 April 2020.

also that this effect was all the more marked in countries where those broadcasters were well funded.¹⁴ Similarly, a study conducted across 17 European countries found that better funded PSMs achieve higher market shares and greater trust in their reliability as an independent news source.¹⁵

PSM is frequently confused and conflated with state media. However, while EU law requiring all Member States to

"guarantee at least one comprehensive wide-ranging service comprising information, education, culture and entertainment"¹⁶

has led to the maintenance and funding of state broadcasting services to fulfil this role, PSM principles are by no means solely limited to state broadcasters.

The 2015 Rafter report asserted that "National and local radio stations [...] now produce programming which meets any definition of public service broadcasting." The report argued that to support and sustain quality journalism in Ireland it was necessary to ensure "that the Irish public has access to a strong and vibrant alternative information source of broadcast news, and outlets for its transmission, beyond that gathered and provided by RTÉ and TG4."¹⁷ Independent radio offers such an alternative, but needs financial recognition of this service in order to continually effectively providing it.

Further support for the argument that Irish independent radio fulfils key public service duties came with the 2019 'Future of Public Service Broadcasting on Independent Radio' report, in which author Garret Harte noted that more than 40% of the content of Irish independent radio stations comprise of public service programming. Harte argued that independent stations act in a competitive but ultimately complimentary fashion to state broadcaster, RTE, to provide the Irish public with a thorough and diverse range of public service media: "The State Broadcaster will never be able to replicate the services provided by independent radio in Ireland as indeed the independent broadcasters could never replicate the programming provided by RTÉ."¹⁸

In light of the Covid-19 pandemic, **which saw independent Irish radio deliver vital public service broadcasting to listeners,**

while suffering under significant economic constraints as a consequence of lockdown, there is an urgent need to re-evaluate the role and structure of PSM in Ireland.

¹⁴ Soroka, S., Andrew, B., Aalberg, T., Iyengar, S., Curran, J., Coen, S., Hayashi, K., Jones, P., Mazzoleni, G., Woong Rhee, J., Rowe, D., and Tiffen, R. (2013) 'Auntie Knows Best? Public Broadcasters and Current Affairs Knowledge.' *British Journal of Political Science* 43(4): 719-739.

¹⁵ Saurwein F, Eberwein T and Karmasin M (2019) 'Public Service Media in Europe: Exploring the Relationship between Funding and Audience Performance.' *Javnost - The Public* 26(3): 291-308.

¹⁶ Council of Europe (2009) 'Recommendation 1878 (2009) of the Parliamentary Assembly of the Council of Europe on the funding of public service broadcasting.' 25 June 2009.

¹⁷ Rafter, K (2015) 'Television Licence Fee: A report prepared by Kevin Rafter for the Independent Broadcasters of Ireland' Independent Broadcasters of Ireland

¹⁸ Harte, G. (2019) 'The Future of Public Service Broadcasting on Independent Radio' Independent Broadcasters of Ireland



5

Methodology

5. Methodology

As stated in the introduction, this study progressed from three central research questions:

- 1 What has the Covid-19 pandemic demonstrated about the role of independent radio in Irish society?
- 2 What impact has the pandemic had on the sector?
- 3 How best can the sector be supported in light of the pandemic?

In order to effectively address these questions, this study adopted an approach that could take account of both the breadth and the depth of the experiences of independent radio stations across Ireland. To account for the former, a survey was developed and distributed to 42 professionals in the independent Irish radio sector. 20 of these respondents were then contacted for follow-up interviews in order to gain a more in-depth understanding of their station's experience.

Survey respondents were CEOs of national, regional and local radio stations along with the sales houses who support the radio stations. In all, 33 of the 42 independent radio professionals who received the survey responded, a response rate of 78.5%. In the case of radio groups, responses were collated prior to submission.

The survey was divided into 6 sections. An **introductory** section concisely outlined the

background and purpose of the study and collected information pertaining to which organisation the respondent worked for and their role within the organisation. The **second** focused on the financial impact of the pandemic on their organisation, in addition to the role of related government supports in alleviating that impact. The **third** dealt with the impact of the pandemic on the organisation's staff, both in emotional and financial terms. The **fourth** section focused on the role of Learning Waves in providing training to address the challenges of the pandemic. The **fifth** section addressed the effect of the pandemic on radio content. The **final** section gathered respondents' insights on the future of their organisation and the wider Irish independent radio sector.

To build upon the information collected in the survey and explore the impact of the pandemic on the sector with greater nuance, follow-up interviews were conducted with 11 radio professionals across Ireland. Interviewees were largely comprised of the CEOs representing local, regional and national radio stations. In addition to this, the Station Editor of Newstalk and Director of People and Culture of Communicorp were also interviewed. Interviews followed were conducted in a semi-structured manner and lasted between approximately 20 and 30 minutes. The duration of the interviews was deemed sufficient to gain the detailed insight of the subjects, while being short enough to accommodate their busy schedules and therefore make them amenable to offering their views. The semi-structured approach allowed for further development on unexpected insights that emerged in the interviewing process, rather than constraining the interview to follow a strict adherence to a pre-set list of questions.



Findings

6

6. Findings

Impact of Pandemic on Radio Stations

First and foremost, survey results attested to significant revenue loss in the Irish independent radio sector as a consequence of the pandemic. Roughly one third of respondents cited 0-25% decline over the period encompassing the initial lockdown (March 2020) to the end of the year, while 57.6% cited an even more significant decline of 25-50%. Of the revenue streams available to independent radio, local advertising revenue was affected the most severely. As such, state intervention and supports were essential to sustaining independent radio. The BAI Sound & Vision fund was particularly notable in this regard, with over 90% of respondents feeling that its impact on their organisation's continued ability to function was either significant or essential. Similarly, two thirds of respondents felt that, overall, government supports had addressed the issues their organisations faced quite well.

"In line with all other radio stations in the country, I think, we've experienced a significant drop in our direct, local advertising because basically the clients are not open for business – a huge portion of them – so that is something that has impacted on us very, very badly."

**CEO of an independent station
based in Munster**

Nonetheless, the interviews revealed some discontent with significant aspects of the Sound & Vision fund. The CEO of one local radio station described it as "unworkable" and "bureaucratic," comments that were indicative of several others who spoke of difficult experiences in accessing the funding:

"I think they could have made it [the application process] a little easier."

Other interviewees felt that while accessing the funding was a daunting task, they understood the need for funding to be subject to such rigorous scrutiny:

"they [the BAI] have to be responsible, [they need to know] that the funding has to be used well."

Nonetheless, there was a feeling that the funding process gave little consideration of the disparity of resources between local stations and national media organisations:

"a local radio station has to put the same work in if they're applying for a €10,000 grant for a series of programmes on local radio, as Virgin Media Television or RTE would for a 10-part TV production that's costing millions."

Since the pandemic started, and up to December 2020, what has been the level of revenue decline in your organisation?

0% - 24% DECLINE	25% - 49% DECLINE	50% - 74% DECLINE	75% DECLINE	UNSURE
33.3%	57.6%	0%	3%	6%

Key Insight:

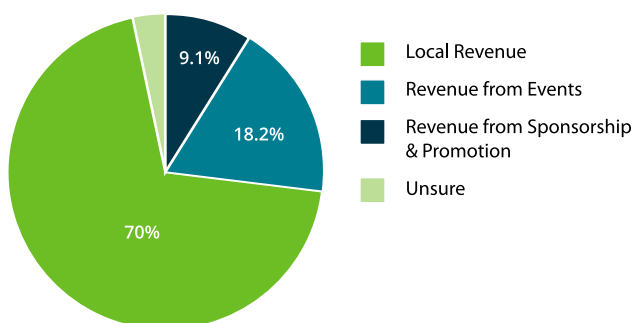
The BAI Sound and Vision fund was crucial to the operation of independent radio during the pandemic, but needs to better take account of the varied resources across the sector. 60% of respondents described the fund's impact as 'significant,' while 30% found it 'essential.' However, as previous interview quotes have attested, many station heads found the application process particularly onerous given their organisation's relative resources.

Key Insight:

Government supports have largely aided in the short-term problems caused by the pandemic, but longer term issues remain unaddressed. Asked to grade the effectiveness of governments supports during the pandemic, 66% of respondents opted for Options 4 or 5 ('Quite Well' and 'Very Well,' respectively) with a further 24% choosing 'Somewhat' (Option 3). However, with fears over the pandemic's long term impact on local business (the knock-on effects on stations' local ad revenue) and the continuing distorting effect of social media companies on ad revenue, there were significant anxieties about the sector's long term future. Interviewees saw the pandemic as highlighting underlying problems facing the sector that require long term solutions:

"It [the pandemic] has kind of wound forward the collapse of revenues in many ways."

Which Revenue Streams have suffered the greatest impact from the pandemic?



What have been the most difficult aspects of dealing with Covid-19 within your organisation?

60.6% The psychological and emotional impact of dealing with the pandemic

Concerns about the financial viability of your organisation **87.9%**

48.5% The intense workload

Social isolation **30.3%**

78.8% Managing people/teams remotely

Technical challenges **33.3%**

27.3% Reducing staff numbers

Risk of contracting the virus **39.4%**

6% Other

Impact of Pandemic on Radio Staff

The pandemic also had significant financial and emotional impact on staff in the sector with over half of respondents citing staff losses. Increased anxiety levels and increased workload were among the factors cited as having most prominently effected staff. Over half of the organisations surveyed

experienced staff losses, with freelance staff being the hardest hit. Looking ahead to the long term effects of the pandemic, respondents felt that, skills-wise, staff were well equipped to adapt to the future. Indeed, many respondents cited an increase in staff and station creativity during the pandemic. Wider financial concerns in the sector, rather than lack of relevant skills, pose the most significant threat to the livelihood of independent radio staff.

Key Insight:

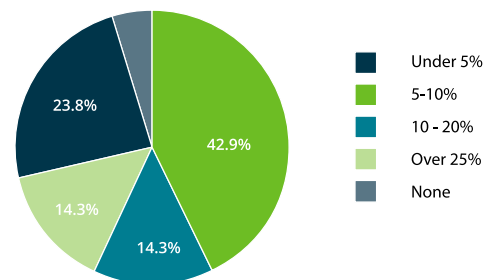
Radio staff creativity rose during the pandemic. 81.8% of respondents cited a rise in staff creativity as a consequence of the upheaval brought about by the pandemic. Many of them expressed the intention to retain some of these innovations once normal working conditions resumed. As one respondent states: *"It has given us more ideas and new ways of talking to our audience. Routines are out the window [...] We have had to come up with new ways to entertain and speak to our listeners"*. However, notes of caution were also sounded with regard to pandemic necessities, such as remote working becoming mooted as long term solutions for the sector: *"One of the great things about radio is that it's a very forward or public facing business [...] there's a great interaction between local radio and the public [...] and I think the danger is that we'll lose some of that if we go too far down remote working."*

Key Insight:

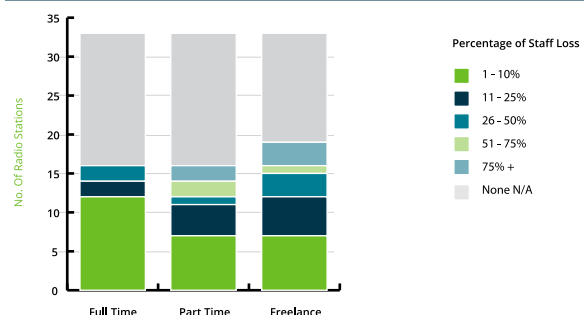
The pandemic has had a significant toll on radio staff's mental health, exacerbating the pressures journalists already face.

When asked about the biggest challenges facing their staff in the coming year, just under half of survey respondents (48.48%) cited mental health-related concerns such as uncertainty, anxiety and stress. Salary cuts and lack of job security as a result of the pressures faced by stations (outlined in the preceding section) played a significant role in these concerns. This is a common consequence of the pandemic for most people, but the nature of the role played by independent radio during the crisis compounds things. Stations' efforts in fighting disinformation during the pandemic, for instance, saw them often face online harassment from conspiracy theorists. One station CEO mentioned *"one of our presenters [was] getting phone calls in the night."* Again, the long term issues facing independent radio more widely were discussed as a factor in arousing staff anxiety: *"The overall direction of travel at the moment is that journalism is under pressure and will continue to be under pressure."* Burnout and the difficulty of maintaining a positive attitude outside of work were cited by survey respondents as significant challenges for staff.

Approx Level of Staff Losses during the Pandemic



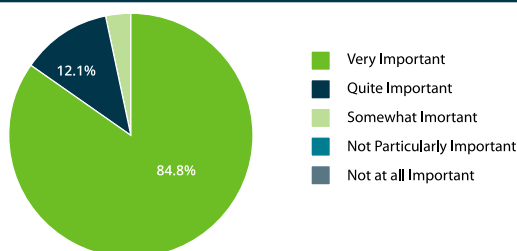
What has been the level of losses across staff in specific contracts in your organisation



Support from Learning Waves during the Pandemic

With regard to equipping staff with the skills necessary to weather the changes brought on by the pandemic, the response was largely positive. The work of Learning Waves was viewed by survey respondents as helpful in developing their staff. Indeed, the vast majority of respondents cited Learning Waves as very important to the long term health of Irish independent radio. The development of new skills was seen by respondents as the biggest impact of training during the pandemic.

How Important is Learning Waves to the Longterm health of the Independent Irish Radio Sector?



As one respondent put it:

"I can't praise Learning Waves highly enough. Having the resource to upskill staff during a pandemic has been invaluable. We've seen staff diversify and grow in their roles, becoming more effective in work with other departments." With regard to future training priorities digital skills were repeatedly identified as key with one interview saying *"we all build digital into everything we think about now: 'how's that going to look online, how's that going to look on Facebook?' That has all been accelerated by the pandemic."*

Key Insight:

Radio staff and Learning Waves rose to the challenges of the pandemic. 69.7% of

survey respondents saw an increase in staff availing of opportunities for further training during the pandemic. Furthermore, 88% felt their staff adapted well to online training. Learning Waves increased the level of training on offer, focusing on both hard and soft skill developments. One survey respondent described Learning Waves as giving *"motivation and new skills to our staff. It has given staff the chance to upskill during quiet times when normally they wouldn't have the time for courses."*

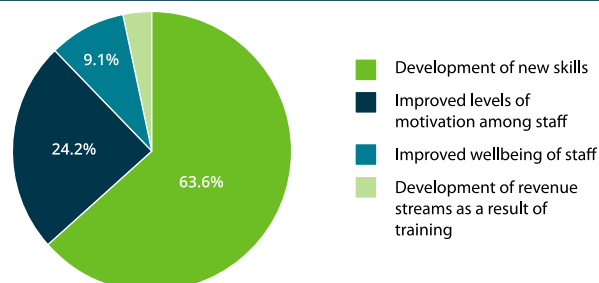
Learning Waves was particularly swift in moving their training online, which was described by one

respondent as *"a great asset going forward,"* noting that the organisation had *"adapted to the new needs of the industry and created new courses overnight that all businesses needed support in."*

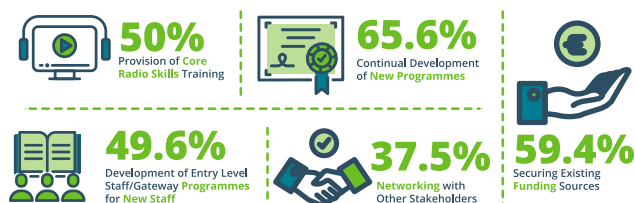
"Learning Waves provided not just its usual high standard courses, which went online and meant even more of our staff could avail of the opportunity to do the course but they also provided the required health and safety Covid courses so we could stay open safely"

Survey Respondent

Where staff have engaged in training during the pandemic, what do you believe to be the biggest impact of training?



What services provided by Learning Waves will be most helpful in a post-pandemic media landscape?

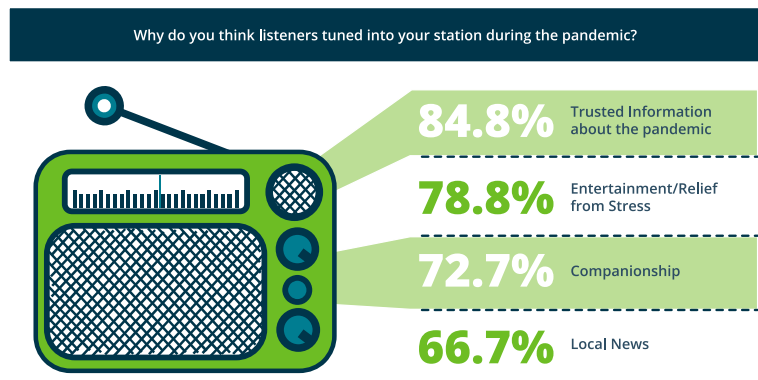


Content during the Pandemic

Despite these trying conditions, independent radio continued to play a prominent and, indeed, vital role in Irish society during the pandemic. More than three quarters of survey respondents attested to an increase in content produced by their organisation. As one interviewee put it: *"in times of big national stories, such as when the banks were bailed out and so on, people turn to national stations because that's where they're going to get the strong national picture and authoritative coverage. Equally, at a time like this, they're going to get the news and how it affects them on a more micro level."* Furthermore, the study attested to the significant part the sector played in maintaining social cohesion and supporting public morale, particularly with regard to dispelling Covid-19 related misinformation. This did not only involve providing a locally engaged platform for advice from expert medical authorities, but also providing emotional reassurance in the face of fears and anxieties among local communities, with one interviewee describing the role as *"really about being nearly like a family member to some people."* Furthermore, many respondents cited that the creative solutions they developed in order to address the unique challenge of covering the pandemic would ultimately extend beyond the shadow of Covid-19.

As one respondent elaborated:

"We have done a number of projects on air and on digital to target the younger target audience to inform, educate and foster debate. We aim to keep this up to cover other non-Covid topics, such as racism, LGBTQ issues, etc."



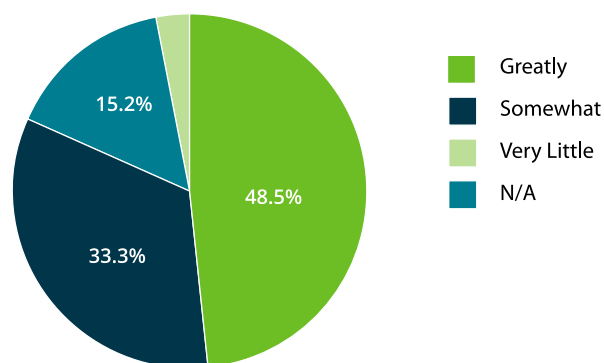
Key Insight:

Despite difficult working conditions and financial constraints, independent radio stations increased their output during the pandemic. 42.4% of survey respondents cited a slight increase in their station's content output during the pandemic, while 36.4% cited a significant increase. On air content was perhaps the most significant growth area, with 81% of respondents citing an increase of some sort, but there was also significant increase production on digital platforms, such as online audio (78% citing an increase), online written content (78% citing an increase), and (60% citing an increase).

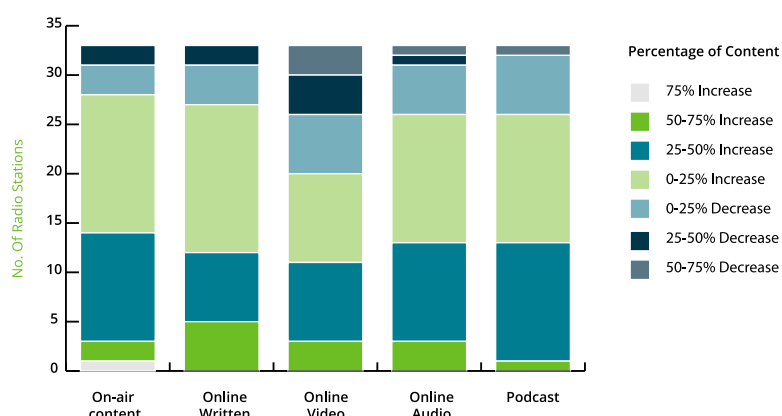
Key Insight:

Listeners turned to independent radio for trusted news about the pandemic and local radio played a key role in dispelling pandemic-related misinformation. 84.8% of survey respondents cited this as a significant factor in their station's listenership during the pandemic. Furthermore, 87% of respondents cited an increase in the audience's engagement with their on-air content during the pandemic, pointing towards an increased appetite for trustworthy, relatable media. 97% of survey respondents asserted that their station had taken responsibility in combatting misinformation concerning the pandemic. Specific strategies included "On air and online initiatives aimed at encouraging listeners to educate and inform themselves," "Sourcing credible, trustworthy qualified contributors to comment on the narrative by challenging contrary views and by drawing on international experiences," and "Localising information with local experts."

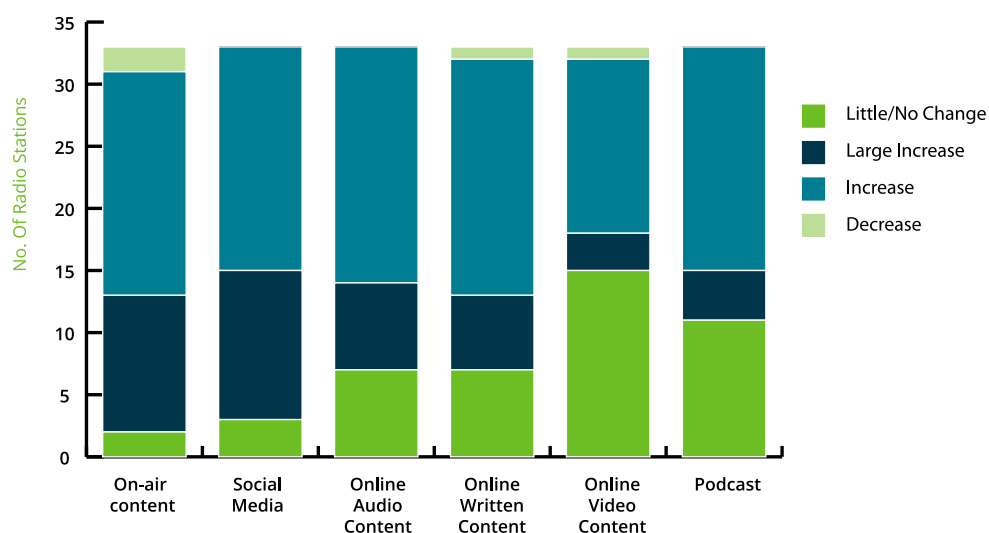
To what extent did the BAI's 'Sound and Vision' funding contribute to any increases in content during the pandemic?



Increase or Decrease in specific content during the pandemic



Approximately, how has the Covid-19 pandemic impacted on your audience's engagement with the station(s)





The Future

7. The Future

For all the understandable pride in the work carried out by the sector during the pandemic, responses regarding the future ranged from cautious to pessimistic. Just under half of respondents described their organisation's future as involving significant restricting or diminished services. There was very little confidence of any revenue growth in the near future. Though concerns were occasionally leavened with hopes that the pandemic had triggered renewed appreciation for the sector – as one survey respondent put it: *“There is a fear that the pandemic coming on top of a very challenged radio advertising market could cause the closure of struggling stations. However, Covid-19 has brought people back to radio and I am optimistic that we now have a better future ahead of us, post Covid-19.”*

“The overall direction of travel for journalism is in a negative direction, unless something is done.”

CEO of an independent station based in Leinster

There was a marked frustration with government and policy-makers' appreciation for the issues facing the sector expressed in the survey. One interviewee further articulated such frustrations by noting that the government *“say all the right things [...] but the pace of change is very slow.”* Some interviewees expressed sympathy with the overwhelming task the government faced in addressing the pandemic, and allowed that this understandably impacted on their abilities to address the concerns of the independent radio sector with due thoroughness. However, the dissatisfaction with government response to the pressing issues facing the sector extended beyond the context of Covid-19. The assertion that independent radio constituted an important public service frequently arose – directly and indirectly – in interviews. There was a frustration with policy makers' reluctance to acknowledge or engage with that view: *“We're seen as a business like any other business [...] that's a very short sighted view.”*

“It's really not recognised that we are a public service at all. We don't get any public money to provide news, current affairs of live programming.”

Station Editor of a national independent radio station

The issue of the lack of regulation with regard to arguably radio's biggest competitor, digital media, was also a prominent, recurring concern. Interviewees felt little envy for the freer hand digital media is allowed in Ireland, arguing that most stations value the role they play as a public service, eschewing more sensationalist and commercially viable tactics in favour of exercising a sense of social responsibility. Rather, they argued that Ireland's lack of regulation of digital media left it vulnerable to misinformation and fear-mongering, a particularly potent problem during the pandemic, asserting that *“It's complacent to underestimate the importance of [responsible media] in terms of maintaining social cohesion.”*

With regard to regulation, many survey respondents argued that the regulator (currently the BAI, soon to be replaced by the Media Commission) should offer the sector practical financial support that takes account of the varying resources across Irish Independent Radio. Furthermore, they argued that the regulator should build from the support it offered during the pandemic (most notably the Sound and Vision scheme) to develop structures that account for the rapidly changing media landscape, such as amending the radio license renewal process (*"it is nigh on impossible for any radio station to consider and plan for a licence renewal while battling to stay in business during Covid"*) and reconsidering the broadcasting levy.

Key Insight:

Government understands the value of independent radio to Irish society, but does not understand the sector's concerns. Asked to grade the government's understanding of the value of the sector on a five-point scale, 66% of survey respondents chose option 4 or 5 (Quite Well and Very Well, respectively), with a further 30.3% choosing option 3 (Somewhat Well). When presented with the same options pertaining to the government's understanding of the sector's concerns, results were dramatically different, with just 33% of respondents choosing options 4 or 5, over 50% choosing option 3 and a remaining 12% choosing option 2 (Not Much). One survey respondent expressed the wish that policymakers and the BAI be *"aware of the needs of our organisations; suspension of new licences until market recovers; ease of access to funding; support the calls for some of the licence fee to be distributed to local station for local news."*

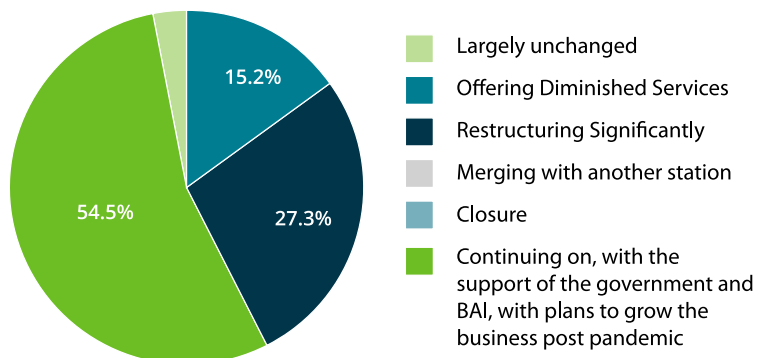
Key Insight:

Financial support is the most pressing need of Irish independent radio in the wake of the pandemic. Survey respondents overwhelmingly cited financial concerns when asked about the sector's immediate needs after a year of the pandemic. 81.1% of respondents were not confident of revenue growth in the first quarter of 2021. The issue of retaining and motivating quality staff against the backdrop of a rapidly changing media landscape was cited by survey respondents as a specific element of those financial concerns. There was a concern about the difficulties of reconciling the valuable public services provided by stations (such as news and current affairs programming) with the relentless commercial pressures of the Irish media ecosystem. In this context, the establishment of a Radio Promotional body was seen as essential to the future of the sector.

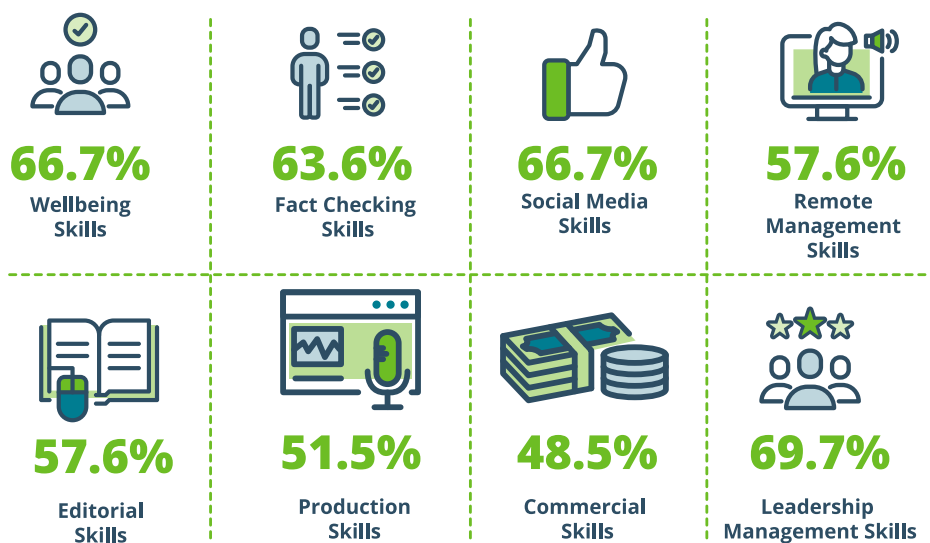
Key Insight:

It is vital that the Future of Media Commission provide the sector with a viable path forward. 54.5% of survey respondents believed the Commission would have a positive impact on the sector, while just 15.2% thought that it would not. The remaining respondents were more mixed in their expectations, recognising the potential for change while articulating fears that the Commission would result in another report and little action. The results of the Commission need to recognise the urgency of the sector's concerns and provide a substantive response. One survey respondent argued for the need to *"allow for a level playing field [for independent radio] vs. digital and social competitors in a commercial sense,"* while another asserted that *"distracting issues such as renewal of radio licences need to be looked at and amended - it is nigh on impossible for any radio station to consider and plan for a licence renewal while battling to stay in business during Covid."* It is evident that the sector need direct and specific actions taken by policymakers in the immediate future.

Which of these scenarios best represents the future of your station in wake of the pandemic?



What are the skills that are most vital to radio staff in light of the pandemic?



Learning for Leaders



8. *Learning for Leaders*

What Independent Radio Learned during the Pandemic

The pandemic was undoubtedly a very trying time for senior management of independent radio stations across Ireland, necessitating rapid decision making and an understandably hectic pace of work. This report thus offers valuable insight in providing a nuanced perspective into what the crisis revealed about the sector that may well have gone unnoticed amid the day-to-day difficulties of managing a station during a time of unprecedented economic and social upheaval.

Asked to share what they had learned from leading a station during the pandemic, survey respondents provided a range of insights, including:

- We have a resilient workforce that were really well equipped to deal with the many challenges faced during the pandemic
- There is a continuous need to plan and communicate regularly with all staff
- The importance of strong management and communication should not be underestimated
- Staff are, and can be, flexible and they will continually find new ways of doing old things
- Importance of hard working and committed staff cannot be underestimated
- We as managers need to always stay positive and stay connected
- Radio is adaptable
- Importance of news and accurate delivery of information is hugely important to our audiences
- How quickly the team could react, we are doing things in a manner we never thought would be successful
- Communicate, communicate, communicate

In addition, survey respondents were also asked about the opportunities afforded by the pandemic. While the crisis has placed the sector under enormous stress, it has nevertheless demonstrated the innovation and flexibility of independent radio. Certain changes and innovations enacted to address the pandemic may well have long term impact on the strategies of the sector.

Insights included:

- The pandemic has made us re-evaluate our overall business and adjust to ensure the long term viability for the station
- Our sales team has always worked remotely but now we know others can do so effectively too. I think we'll have a more blended approach to working when we come out the other side of the pandemic, a mixture of remote and on site working.
- The Sound and Vision Fund afforded us the opportunity to create some outstanding content specifically targeting 15-34 year olds in the South East. We carried out a survey among our listeners about our Covid-19 specific content and the response was overwhelmingly positive. In addition to this, it is less manic so we've had more time to dedicate to strategic planning.

- We have developed new streamlined ways of working that facilitate a better life/work balance for staff
- It has opened up a dialogue in relation to staff working from home. We were fortunate to have had enough back up equipment to enable staff members to broadcast from home and for admin and sales to conduct all day-to-day business from their home offices
- It has allowed us the time to relook at some of the practices within the organisations including health and safety/IT/Social media/sales systems
- Many of our staff have also availed of upskilling courses during this period.
- The biggest opportunity was twofold:
 - (1) our listenership increased by in excess of 20% and
 - (2) the Government spend on advertising and supports helped greatly. The lobbying campaign by IBI was hugely successful also.
- It provided us with an opportunity to get closer to our audience and increased interaction with sectors we would not normally interact with
- Radio became the media of choice for a huge amount of clients and the loyalty of the listeners

Ultimately, while the pandemic has been the cause of enormous upheaval and stress for Irish independent radio, illustrating the fragility of Ireland's existing media eco-system (a point which is addressed in further detail in this report's conclusion); it also provided the sector with new insights into its own capacity for innovation and adaptability.



Conclusion

9. Conclusion

Two clear points emerge from this study of the impact of the Covid-19 pandemic on Irish independent radio.

Firstly, that independent radio has played a very significant role in fighting misinformation and maintaining social cohesion during the greatest crisis the country had faced for generations.

And secondly, that the crisis has exacerbated the considerable financial strains the sector was already wrestling with.

There is a pressing need to address the issues the Irish independent radio sector faces in light of its clear contribution to the richness of the Irish media landscape and the health of wider Irish society.

Fundamentally, this involves the formal acknowledgement of the public service provided by the sector.

However, building from Harte's assertions that independent radio and RTE function as complimentary public services, it is vital that any recognition of independent radio as PSM is nuanced enough to account for the key differences between local radio and the state broadcaster.

Future financial supports in light of the impact of the pandemic must make due allowance of the diversity of what constitutes PSM, rather than labouring under a 'one size fits all' approach which makes little distinction between the resources and priorities of a local radio station and those of a nationwide broadcaster. PSM which operate on a strictly local level may not have nor need the scale of resources available to national organisations, but that does not make their contribution any less valuable. Indeed, local media can fulfil a unique function in realising the PSM ethos by communicating with listeners on a level of intimacy unmatched by national broadcasters, *"like a family member"* as one of the interviewees put it.

Speaking on the 2021 US Capitol riots, Yale academic Timothy Snyder ascribed the rise of conspiracy theories, disinformation and mistrust in America to the decline of local media in that country. Snyder described local media as functioning as *"common ground to start larger conversations on,"*¹⁹ contrasting it with the distrust and alienation fostered by social media platforms. Elsewhere, Snyder asserted that social media "is no substitute" for local media, arguing that it "supercharges the mental habits by which we seek emotional stimulation and comfort, which means losing the distinction between what feels true and what actually is true."²⁰ These assertions were echoed in interviews conducted for this report, in which the social benefits of independent and local radio (*"It's a forum for public debate and discussion. It reflects society and holds a mirror up to itself. It highlights issues that need to be discussed and enables public conversation"*) were contrasted with the inadequate substitute provided by unregulated internet platforms (*"I wouldn't accept any kind of public service claims out of Facebook or Google while they abdicate all responsibilities for what they facilitate"*).

The question of the regulation of digital media is beyond the bounds of this report, but it is difficult to disentangle from the fate of Irish independent radio.

Multiple interviewees identified competition from digital media, in terms of both audiences and ad revenue, as a concern for the long term health of their station.

It is evident that while digital media does not fulfil the remit of PSM, it may nevertheless displace more principled media if current conditions are allowed to continue. The Covid-19 pandemic can be read as a warning for the potential of crises being exacerbated – or even created – through unchecked flowing of misinformation and mistrust. PSM can play a big role in alleviating – or even preventing – such crises, but only with sufficient support and only with acknowledgement of independent radio as a key part of this role.

¹⁹ Snyder, T. (2021) 'Has the threat of Trump really gone?' Channel 4 News <https://www.youtube.com/watch?v=JUziztn5v4> 8 January 2021

²⁰ Snyder, T. (2021) 'The American Abyss,' New York Times Magazine <https://www.nytimes.com/2021/01/09/magazine/trump-coup.html> 9 January 2021

A man with a beard and earbuds is looking down at a smartphone. A large, semi-transparent white '10' is overlaid on the image. The word 'Recommendations' is written in green text across the middle of the '10'.

10
Recommendations

10. Recommendations

Efforts must thus be made to address this development through restructuring current PSM supports to more adequately account for independent radio's significant role. Such efforts will be most effective through adhering to key tenets gleaned from this study:

- Supports for independent radio, while remaining rigorous in their application process, must take account of the vastly varied resources of the stations that make up the sector.
- The independent sector needs a sustained funding stream. Reliance on ad hoc schemes, such as Sound and Vision, creates uncertainty. At the same time, funding schemes should be broadened and ring-fenced/sector specific to include a wider range of content including news and current affairs. This would afford greater recognition of the public service provided by the independent sector.
- Most involved in the sector are supportive of appropriate regulation, with some citing the UK and US as cautionary tales for how shallow a purely commercial local radio landscape can become. Ireland currently has the benefit of a diverse and healthy public service media made up of both state and local broadcasters, but the pandemic has demonstrated the fragility of this media ecosystem. There is therefore an urgent need for policymakers to work with the independent sector in revising regulation to fit a rapidly changing media landscape.
- The state cannot combat the 'infodemic' of misinformation and mistrust alone. Independent radio is willing and capable of playing an active role in this effort, but they cannot effectively play this role while considered purely commercial entities.
- More regular and structured dialogue is needed between policy makers and representatives of independent radio. There is an evident gulf in understanding between the two that is not bridged by current arrangements. Innovation is required to reassess the long-term business models of Irish media at national, local, and community levels, and this will come through cross-pollination of perspectives and insights.
- Independent radio staff clearly rose to the challenges of the pandemic with energy and creativity. However, there is a need to build on this by supporting the structures which equip staff with the abilities to adapt to the ongoing upheavals in wider media. Learning Waves is well-placed to play a key role in building capacity in the sector to combat misinformation and address digital innovations, but needs support and recognition to do so. Sustainable funding for the provision of training and development opportunities across the media sector is needed.

Ultimately the funding provided by the government to see the sector through the pandemic can be read as a tacit admission of the value independent radio provides to wider Irish society. Indeed, the substance of many of the above recommendations has been echoed throughout the Future of Media Commission's thematic dialogues. However, as the country emerges from the shadow of Covid-19, the impact of the pandemic will continue to be felt by independent radio stations across the country, it is vital that subsequent governments and policy makers remain mindful of the role they played during the crisis.

