

A research report prepared by MORI Ireland on behalf of the BCI/Foras na Gaeilge
DECEMBER 2004

Turning on and Tuning in to Irish Language Radio in the 21st Century



*An Roinn Gnóthaí Pobail, Tuaithe
agus Gaeltachta*
*Department of Community, Rural
and Gaeltacht Affairs*



Broadcasting Commission of Ireland
Coimisiún Craolacháin na hÉireann

Table of Contents

1	Introduction	3
2	Background	4
3	Sample profile	5
	3.1 Demographic profile	5
4	Lifestyle Profile	6
	4.1 Irish Language Context	6
	4.1.1 Irish Language Skills	6
	4.1.2 Attitudes to Irish Language	7
	4.2 Technology Factors	8
	4.3 Media Consumption	10
5	Irish Language Radio Listeners	12
	5.1 Describing Current Irish Language Radio Listeners	12
	5.2 Programming & Delivery Preferences	14
6	Rejectors of Irish Language Radio	15
	6.1 Describing Rejectors of Irish Language Radio	15
7	Irish Language Radio Programming Preferences	17
	7.1 Content Preferences	17
8	Future of Irish Language Radio Programming	20
	8.1 Introduction	20
	8.2 Overall	20
	8.3 Listeners vs. Rejectors	20
	8.4 Variations by Age Group	21
9	Which group do you identify with?	23
	9.1 Key population segments	23
10	Conclusions	25
	10.1 Recommendations for Further Research	25

Executive Summary

This report contains the findings of a nationally representative survey of radio listeners in Ireland, conducted via telephone with 1,203 respondents. The key aims and objectives of the survey were to establish a reliable and robust data set representing the views of relevant parts of the general public on the provision of Irish language radio programming in Ireland, with a view to gaining a solid understanding of public attitudes and preferences towards this topic and hence providing a basis for meaningful, evidence-based discussion and reliable public policy formation.

MORI Ireland interviewers trained to internationally recognised IQCS (Interviewer Quality Control Scheme) standards conducted interviews to a sample schedule designed in order to maximise the utility of the data and provide opportunities to interrogate the needs and attitudes of important population subgroups, especially those in living in Gaeltacht areas and those aged under 35.

Analysis of the data shows that listenership figures for Irish language radio are healthy, with around a quarter of the population tuning in to Irish language radio at least occasionally. Given that only slightly more than this proportion feel confident enough to claim to speak Irish with any great proficiency, this is an impressive reach. However, the data clearly shows that current Irish language radio listeners are not a homogenous group, and that they have widely varying needs and characteristics – the report therefore concludes that a one-size-fits-all approach will not be feasible when driving satisfaction and engagement levels with Irish language radio amongst current listeners.

In terms of building additional listenership to Irish language radio in general, it is clear that those who do not currently listen to Irish language radio have a strong preference for bilingual programming, and amongst young people there is especially strong support for programming in Irish with English language contemporary music.

There is a high level of national consensus on the future of Irish language radio – large majorities oppose the ghettoisation of the Irish language into restricted monolingual radio stations and support the aim of Irish language radio to attract new listeners. Most also feel that the best way to go about this would be to follow the example set by TG4 in Irish language TV programming – in particular there is strong support for a radio station with Irish language content aimed at younger people, with 75% of respondents calling for this.

The main findings of the report conclude that although current offerings (including Raidió na Gaeltachta) are well regarded by large segments of the population, there is significant unfulfilled need in terms of Irish language radio provision. Specifically, segmentation analysis indicates positive attitudes towards developing increased, diverse and high-quality Irish language radio programmes centred around two key groups;

- Younger people with relatively poor Irish language skills who demand more Irish language programming, specifically in a setting involving English language contemporary music and Irish language links/content
- Flexible bilingualists who do not specifically demand new content in Irish, but who will listen in either English or Irish or both if the content is of sufficiently high quality and relevance

1 Introduction

In May 1999, the Broadcasting Commission of Ireland (BCI), in conjunction with Foras na Gaeilge, established an Advisory Committee in Irish language programming. The Committee consists of representatives from the BCI, Foras na Gaeilge, Gael-Linn and five independent stations. The principal aims of the Committee are to:

1. Examine the types and level of usage of Irish language programming in the independent sector;
2. Identify factors that inhibit and support the production of Irish language programming;
3. Make recommendations to encourage more Irish language usage on-air by independent radio and television stations.

This research was conducted by MORI Ireland on behalf of the Irish Language Advisory Committee to investigate the perceptions and attitudes towards Irish language radio programming in Ireland.

The topic of the Irish language and its popularity is once again at the forefront of popular discourse – for many service providers, their anecdotal evidence suggests that the obligations of the legislation do not take into account the realities of service users' requirements. Indeed, reading the letters page of our national newspapers or listening to the popular talk shows of today might lead one to believe that general attitudes to the Irish language polarise us like few other topics. However, policymakers are increasingly recognising the need for a reliable evidence-base in formulating responsible public policy.

For this reason, the Broadcasting Commission of Ireland is committed to the development of evidence-based policymaking. In the context of broadcasting policy with regard to Irish language radio programming, this means systematically collecting a reliable and robust data set that represents all relevant views. That is, the views of those who avail of existing Irish language programming and of those whose needs are not currently met. A total of 1,203 radio listeners were surveyed via telephone between 30th October and 20th November 2004.

This research aims to contribute to evidence-based policy by surveying the opinions of radio listeners, both Irish speaking and non-Irish speaking. This will allow the BCI to evaluate the general demand for Irish language programming and also the specific Irish language programming preferences of different groups of radio listeners. In terms of structure, this report largely follows the broad themes covered in the survey questionnaire used in collecting the evidence described, a copy of which is contained in the appendices, along with the technical details of the data collection and analysis.

2 Background

The Broadcasting Commission of Ireland (BCI) is responsible for a number of areas with regard to the provision of broadcasting services, including commissioning independent research to assist the development of broadcasting policy in Ireland. It is with regard to the work of the Advisory Committee on Irish language programming that this research has been commissioned.

The history of Irish language radio programming is a long and colourful one. Dating back to the establishment of 2RN in 1926, Ireland's first domestic radio station, the question of Irish language programming has been a central theme of Irish broadcasting policy. While there has generally been consensus regarding the desirability of Irish language programming, agreement on *how* or to *whom* it should be provided has not always been so easy to reach.

Indeed, the establishment of Raidió na Gaeltachta, the national Irish language radio service, had its roots in a conflict between those who were demanding an Irish language station for Irish speakers and those whose preference was for bilingual educational programming on existing channels. Historically, the difficulty has been balancing the educational imperative, promoting the Irish language to those who do not speak it, while providing broadcasting services to those who do. Much of this report is concerned with this very subject.

Apart from the national Irish language station, Raidió na Gaeltachta, which operates as part of RTÉ, there are a number of local and community stations licensed by the BCI providing mostly bilingual Irish language programming. One station, Dublin's Raidió na Life, broadcasts exclusively in Irish. Overall, an examination of programme schedules reveals that it is community stations, such as Flirt FM in Galway, rather than local commercial stations, which provide the majority of BCI-licensed Irish language programming content in Ireland. Again, whether this is the most effective route for delivering Irish language programming is discussed later in this report. The discussion of the evidence begins with a description of those respondents who reported listening to Irish language radio programming on some basis.

3 Sample profile

Obtaining a representative data set in a national survey is traditionally achieved by a combination of techniques, primarily interview quota setting (at the fieldwork stage) and data weighting (at the analysis stage). This aligns the demographic characteristics of the sample with those of the population.

3.1 Demographic profile

A representative data set is one in which the sample of respondents surveyed can be said to accurately represent the population whose views are being examined – in this case radio listeners in Ireland – within certain statistical tolerances. In order to achieve this, one must ensure that the sample of respondents consists of people with different characteristics in the same proportion as is evident in the population.

Known demographic factors such as gender, age, education level and area of residence are usually used to determine the correct proportion of interviews – for instance it is known that in Ireland, the gender split is 49% Male/51% Female¹, so it is necessary to interview respondents in these proportions. This technique is called interview quota setting and is universally used by market research and polling firms.

Some surveys, however, require us to take a different approach, due to their specific requirements – for example where there is a need to investigate in detail the particular needs of a sub-group or sub-region of the population. In the case of this study, statistically valid data on the views of the Gaeltacht population were required. In order to do this, it was calculated that there was a need to conduct 200 interviews. However, with this population constituting such a small part of the total population under the interview quota setting approach outlined above, this would have necessitated conducting many thousands of interviews with non-Gaeltacht residents to achieve the correct balance. As this would have been extremely time consuming and costly, a technique called data weighting was employed. This is conducted at the data analysis stage, and reduces or increases the importance of respondent groups which have been over- or under-sampled (compared to the overall population) for the purposes of top level analysis whilst retaining the statistical validity of the sub-group analysis.

TABLE 1 – DEMOGRAPHIC PROFILE AND WEIGHTING SCHEDULE

Demographic Factor	Quota Set	Interviews Achieved	Weighted Total
Age – 15-34	-	401	489
Age – 35+	-	802	714
Gender – Male	-	496	595
Gender – Female	-	707	608
Region – Dublin	200	200	345
Region – Cork/Kerry	200	201	178
Region – South East	200	200	141
Region – Conn./Ulster	200	200	102
Region – Midwest	200	202	212
Region – Midlands	200	200	225
Region – Gaeltacht Area	200	207	28
TOTAL	1,200	1,203	1,203

¹ Source: CSO Census 2002

4 Lifestyle Profile

The primary objective of this study is to assess the attitudes and needs of the Irish population for Irish language radio programming. However, in order to develop our understanding of the factors behind these attitudes investigated a number of other associated topics were also investigated with a view to further illuminating the survey. The combined responses to these questions provide valuable insights into a range of topics, and in this section the nation's views of Irish language radio programming are placed in context with their attitudes and behaviours surrounding other lifestyle choices.

4.1 Irish Language Context

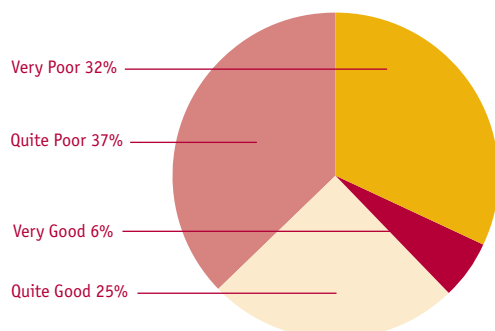
4.1.1 Irish Language Skills

This study afforded an excellent opportunity to investigate both the level of Irish language proficiency and confidence across many groups in Irish society, and also attitudes towards how, and indeed whether, the public felt that the language should be promoted. The survey findings show that under one-third of the population consider themselves to have a good level of proficiency in spoken Irish, with only a small proportion (6%) feeling that they could state confidently that they have 'very good' proficiency.

LEVEL OF IRISH LANGUAGE PROFICIENCY

BASE: ALL RESPONDENTS 1203

%



There is a clear age gap in terms of confidence in Irish – those under the age of 35 are more likely to consider themselves 'quite good', whereas nearly two in five over 35s feel that their abilities are 'very poor'. The gender gap is not so pronounced, however significantly more males than females feel

that their spoken Irish is 'poor'. It should be noted that this question relates to confidence more than actual ability, since respondents were asked to rate their own abilities.

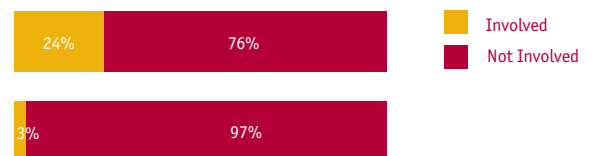
Were a sample asked to complete an Irish language test, it may well be that the abilities of women are identical to those of men – however the ramifications of this lack of confidence cannot be underestimated, especially in the context of Irish language media. It is clear that with confidence declining by age, there is a limited window of opportunity to catch audiences early on, before lack of practice means that they feel out of touch and unable to participate. Programmers will also need to be sensitive to the fragile confidence of some groups when considering how to attract new listeners.

Perhaps the most illustrative measure of this lack of confidence comes from the finding that 43% of Gaeltacht area residents feel that their level of spoken Irish is poor, although this can be explained in part by the gradual erosion of Gaeltacht border areas, with non-Irish language speakers moving into what are officially designated as Gaeltacht regions.

INVOLVEMENT IN IRISH LANGUAGE ACTIVITIES-BY LEVEL OF SPOKEN IRISH

BASE: ALL RESPONDENTS 1203

%



Irish language confidence is strongly linked with involvement in Irish language activities, although it is difficult to draw any conclusions about the lines of causality. Are those who are not involved in Irish language activities not doing so because they are not confident about their Irish, or is it the fact that they have not been involved that is making them lack confidence? It is difficult to say, but the fact that 86% of the younger age group are not involved in any Irish language activities does not reflect well on the continued use of Irish in the years immediately following compulsory Irish

education. Furthermore, with 94% of the older age group not involved, there is little to suggest that sufficient measures have been taken to interest people in subsequently halting this trend or indeed to enable them to do so.

4.1.2 Attitudes to Irish Language

In order to further understand the underlying attitudes of the general public towards the promotion of Irish language radio, respondents were questioned on their overall feelings about Irish and the role that they feel that the Government should have in promoting the language. This helps set the results of the questions about Irish language radio in context by providing us with background data on, for instance, the number of people who feel fundamentally opposed to the promotion of the language at all.

Respondents were classified by their views on the importance of promotion of the language as follows;

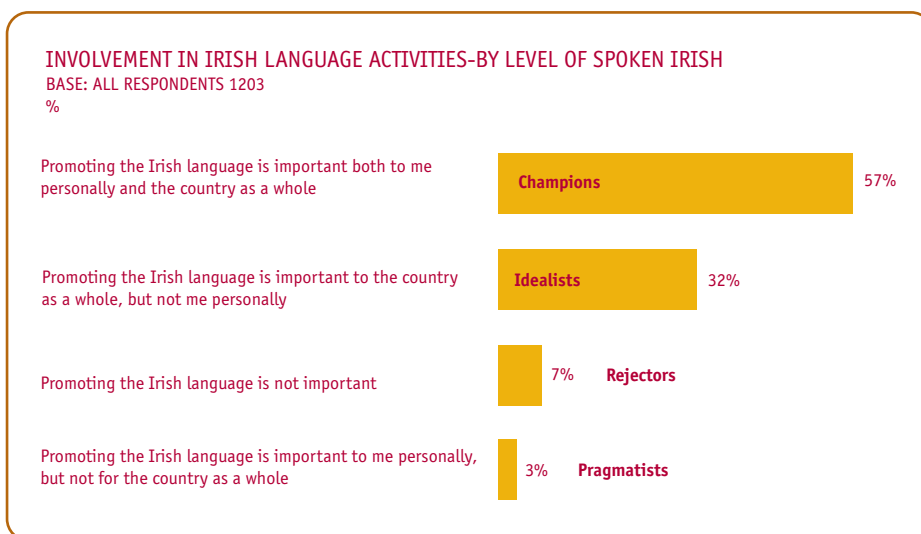
Champions – feel that promoting the language is important both to them personally and for the nation as a whole.

Pragmatists – feel that promoting the language is important on a personal level, but not for the nation as a whole.

Idealists – feel that it is important for the nation that the Irish language is promoted, but that it is not important on a personal level.

Rejectors – feel that it is not important at all for the language to be promoted, either for them personally, or for the country.

As the chart below shows, the majority (57%) of the population classify themselves as Champions – this group is most prevalent in Gaeltacht areas, where 70% of people classify themselves as such, and is regionally strongest in Dublin (63% of people living here classify themselves as Champions, more than any other region). Those who have undergone third-level education are more likely to be Champions, as are those who believe they have a good level of spoken Irish.



The next most populous grouping is the Idealists, constituting around one-third of the population (32%). These people are most likely to be educated to secondary level, with a poor level of spoken Irish. They are also likely to be tabloid newspaper readers (see section 4.3 for a detailed breakdown on media consumption). Unsurprisingly, Gaeltacht area residents are the least likely to fall into this category. It is clear that both of these large groupings are positive towards the promotion of Irish at some level – however the Champions are more engaged and confident at a personal level. Considering the low level of participation in Irish language activities noted earlier, it is difficult to accept the idea that the level of education or engagement with Irish language makes the difference between considering oneself a Champion or an Idealist – this raises questions surrounding level of engagement with national policy and identity which fall outside the remit of this report.

The smallest group identified are the Pragmatists (3%) – these people most likely to be practical users of the language who nonetheless feel that it is not hugely important to promote it at a national level. This group is largely made up of third-level educated Broadsheet readers, or those living in Gaeltacht areas.

AGREEMENT WITH STATEMENT: “IRISH LANGUAGE RADIO PROGRAMMING SHOULD BE PROMOTED FULLY BY THE GOVERNMENT”

BASE: ALL RESPONDENTS 1203

%



The Rejectors group consists of those people who are opposed to the promotion of the Irish language at any level – as such it is encouraging that this group makes up such a small minority in the population (7%). Again, Rejectors are most likely to be Broadsheet readers, with poor Irish language skills. There are also age and gender differences – those in the older age group are most likely to be Rejectors, and men are slightly more likely to fall into this category.

There is a high level of national agreement that the Government should be involved in the promotion of Irish language radio, with support particularly strong amongst the under-35s and amongst Tabloid newspaper readers. In total, around four in five of the population think that the Government should be fully involved in promoting Irish language radio, with most of these feeling that the best way to this would be to devote more funds or to assist with advertising – although it can be difficult for respondents to generate ideas or creative thoughts when in an interview situation, a large number (18%) did spontaneously suggest that the government should concentrate on younger people and even schools as the fulcrum of any Irish language promotion activity.

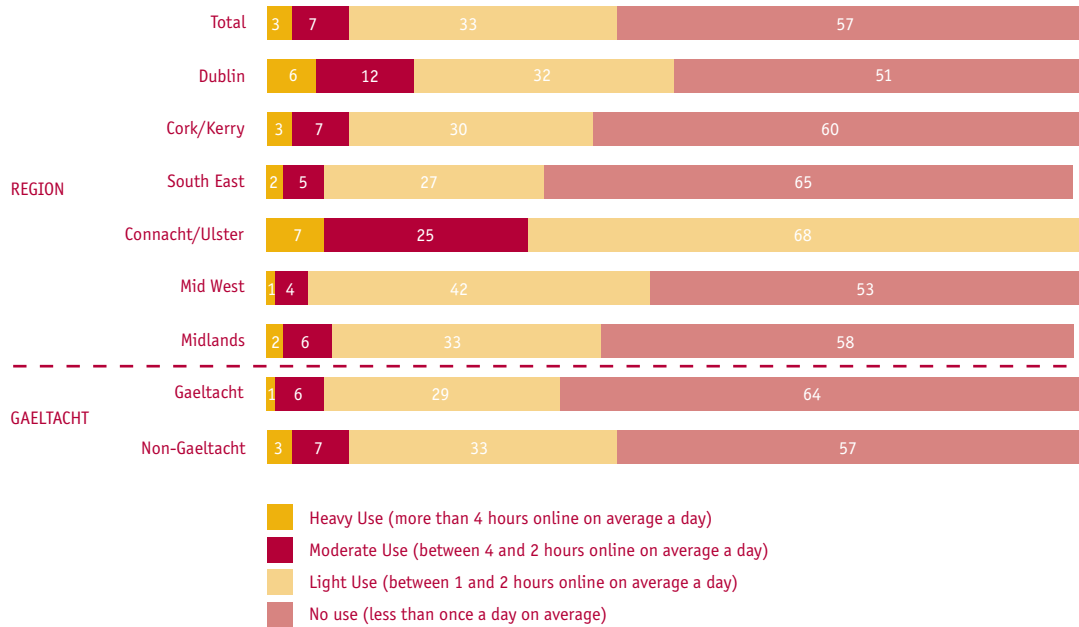
4.2 Technology Factors

As the below charts show, Ireland is a technologically advanced society, with high levels of Internet and mobile phone usage. In terms of delivery channels, these are both likely to become increasingly important in terms of Irish language radio, which can no longer be thought of in purely analogue terms. It is therefore of concern that new technologies such as broadband demonstrate such a heavy Dublin bias in take-up, especially when compared with Gaeltacht areas.

INTERNET USAGE - BY REGION AND GAELTACHT AREAS

BASE: ALL RESPONDENTS 1203

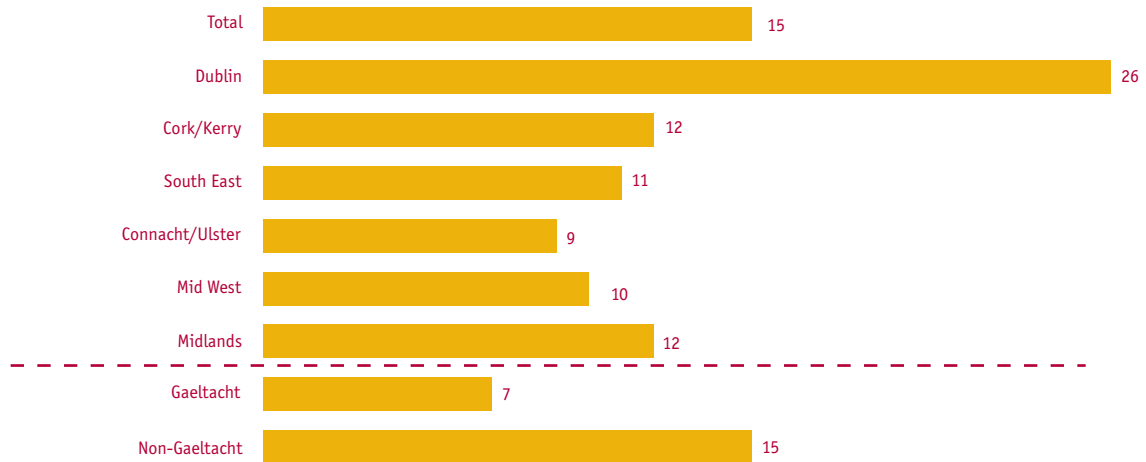
%



ACCESS TO BROADBAND INTERNET ACCESS AT HOME - BY REGION AND GAELTACHT AREAS

BASE: ALL RESPONDENTS 1203

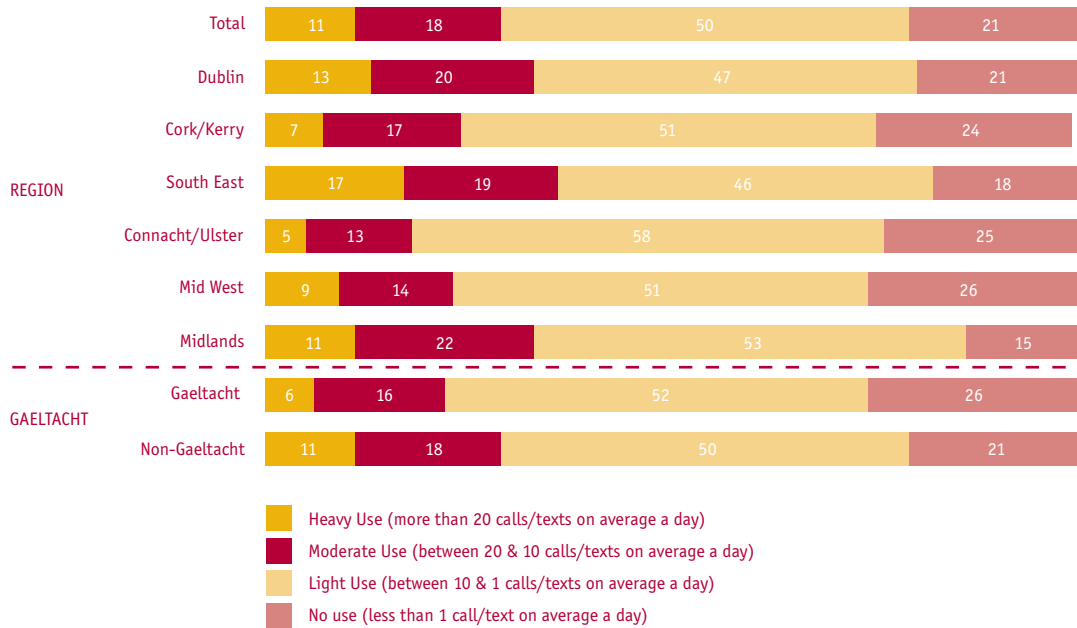
%



MOBILE PHONE USAGE - BY REGION AND GAELTACHT AREAS

BASE: ALL RESPONDENTS 1203

%



4.3 Media Consumption

Our sample of radio listeners showed that 90% of these also read a daily newspaper, with the majority of these either opting for the Irish Independent or the Irish Times. In terms of regional, gender and age splits, our findings were as would be widely expected, but our additional demographic measurements yielded some interesting points.

Gaeltacht area residents are more likely to be *Irish Independent* or *Star* readers than the rest of the population – conversely, the *Examiner* and the *Irish Times* are less popular in these areas. Newspaper readership also seems to be strongly correlated with general views on the importance of promoting the Irish language. Comparing readers of the two main daily newspapers using our categories from section 4.1.2, *Irish Independent* readers are the most likely to be *Pragmatists*. This group believes that promoting Irish is important for them in a practical sense, *rather than important for the nation in a cultural one*. In contrast, the *Irish Times* has a high proportion of *Rejectors* amongst its readership – these people do not believe that promoting Irish is important either

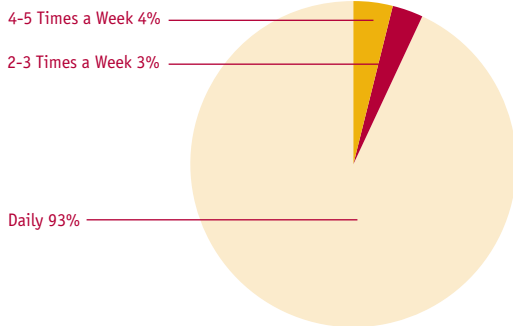
on a personal or national level. The *Star* has a comparatively high proportion of *Champions* amongst its readers, indicating a strong belief in the promotion of Irish on a personal and national level, whilst the home of the *Idealists* (Irish is important for the nation, but not personally) is the *Sun*.

In terms of television, 86% of the population has watched TG4 at some stage. This rises to 93% in the Gaeltacht areas, and further to 95% in the Mid West region as a whole. Interestingly, although those with strong Irish language skills are more likely to have ever watched (91% claim that they have), 85% of those who rated their Irish language skills as poor had watched TG4 in any case. This contrasts with the large differences seen in Irish language radio listenership levels between good speakers and poor speakers and could be an indicator of the increased accessibility (for those with perceived poor Irish language skills) of either the medium of TV or the content provided by TG4. This trend is also evident in terms of frequency of viewing, with differences occurring only at the extremes (watching daily or less than once a week).

FREQUENCY OF LISTENING TO THE RADIO

BASE: ALL RESPONDENTS 1203

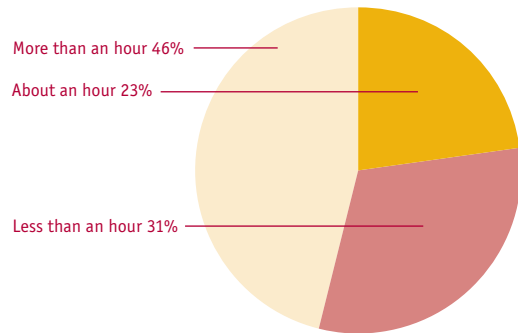
%



LENGTH OF TIME TYPICALLY SPENT LISTENING TO RADIO

BASE: ALL RESPONDENTS 1203

%

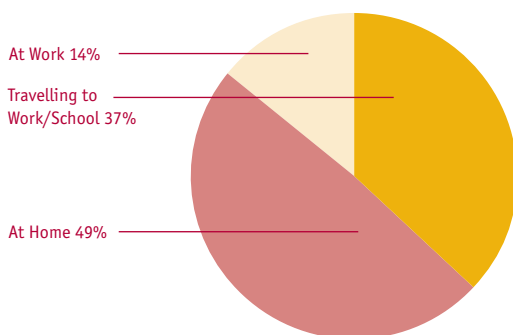


Radio listening habits are clearly defined, with a huge majority (93%) of listeners tuning in on a daily basis. Younger people listen with slightly less frequency, but even so, a massive 90% of this group listen on a daily basis. With almost half of listeners (46%) tuning in for more than an hour at a time, it is clear that radio is a medium with a great capacity for reaching large cross sections of the Irish population regularly.

PLACE WHERE RADIO IS MAINLY LISTENED TO

BASE: ALL RESPONDENTS 1203

%



5 Irish Language Radio Listeners

This section analyses the current listening habits and listening preferences of those respondents who identified themselves as Irish language radio listeners. Respondents were classified as Irish language radio listeners on the basis of their response to the question: 'Do you listen to Irish language radio programming?'. Those who responded 'never' were routed into another series of questions, examining their reasons for not listening, which are analysed in a separate section below. However, it is the opinions of those listeners who reported that they listen to Irish language radio programming that form the basis of this section.

Nonetheless, it is important to stress that the opinions and preferences of those respondents who identified themselves as 'never' listening to Irish language radio programming should not be discounted. In fact, as will be made clear later, a significant proportion of these radio listeners should be considered, and consider themselves, as 'potential' Irish language radio listeners, whose needs are not met currently.

Another cautionary note relates to the fact that these people have supplied this identification as 'never' listening. While an individual might report that they 'never' listen to Irish language radio, the truth may be that they have tried it out on several occasions in the past, did not enjoy the experience and have no intention of listening again. That is not to say that, were stations to alter the programming they provide to attract a different clientele, this position would not change accordingly. This point is elaborated in later section describing potential gaps in the nature of Irish language programming currently being offered.

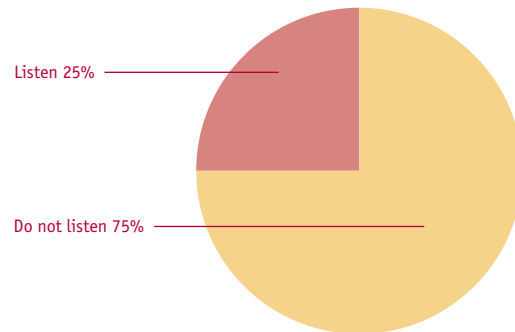
5.1 Describing Current Irish Language Radio Listeners

Of the 1,203 radio listeners surveyed by MORI Ireland, 25% reported that they listen to Irish language radio on some basis, however occasionally. Of the 25% who listen at all 14% of these listen daily, which corresponds to 3.4% of the population. As an indicator of the existing market for Irish language radio programming and given the restricted level of programming currently available, this is an encouraging figure.

IRISH LANGUAGE LISTENERS

BASE: ALL RESPONDENTS 1203

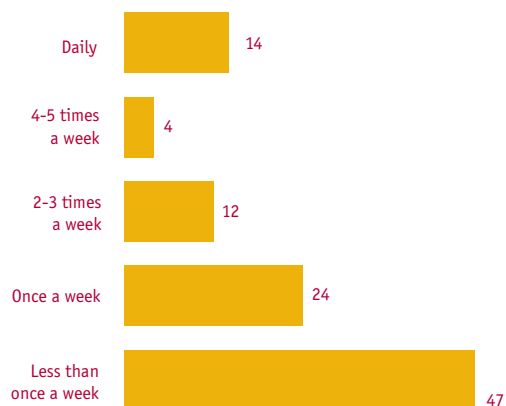
%



FREQUENCY OF LISTENING TO TRISH LANGUAGE RADIO

BASE: ALL THOSE WHO LISTEN TO IRISH LANGUAGE RADIO (302)

%



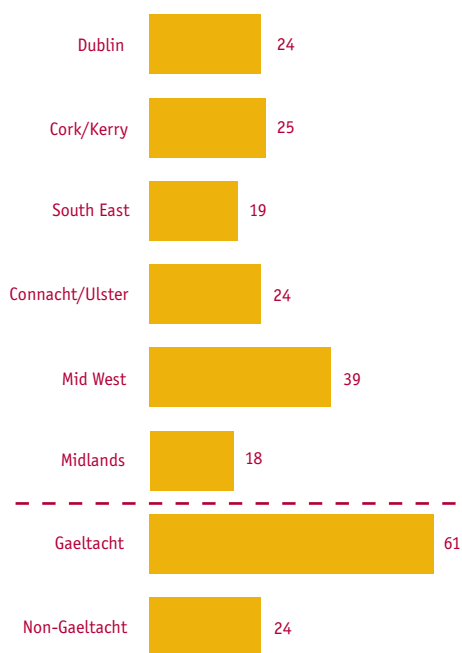
Looking in more detail at the profile of Irish language radio listeners in terms of demographic characteristics, it is instructive to note that the audience is not a homogenous one. Nor does it fit the conventional stereotypes of what we might consider to be the core audience of Irish language radio programming.

While it is primarily an older audience, with 69% of Irish language radio listeners belonging to the 35+ age category, the majority (94%) do not live in the Gaeltacht. However, while 3% of those from non-Gaeltacht areas listen to Irish language radio on a daily basis, 18% of those from Gaeltacht areas do.

In terms of the regional distribution, the most significant portions of the cohort live in the Midlands (28%) and Dublin (28%). Clearly, the

proportion of Irish language radio listeners from Dublin reflects its proportion of the population as a whole. However, the relatively large number of listeners in the Midlands would seem to suggest that there are significant opportunities for

FREQUENCY OF LISTENING TO TRISH LANGUAGE RADIO
BASE: ALL THOSE WHO LISTEN TO IRISH LANGUAGE RADIO (302)
%

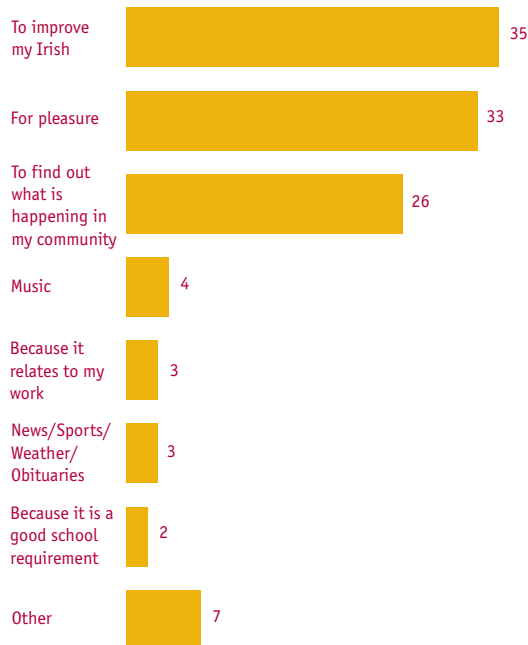


increasing the level of Irish language radio programming in this region.

Digging deeper into the demographic make-up of Irish language radio listeners, there are a number of surprising aspects to their composition. Interestingly, with regard to their level of spoken Irish, just over half of Irish language radio listeners (54%) consider it to be 'good' or 'very good' and only 21% of Irish language radio listeners are involved in Irish language activities. In fact, of the 9% of the population who are involved in Irish language activities, it is only a small majority of these (58%) that listens to Irish language radio.

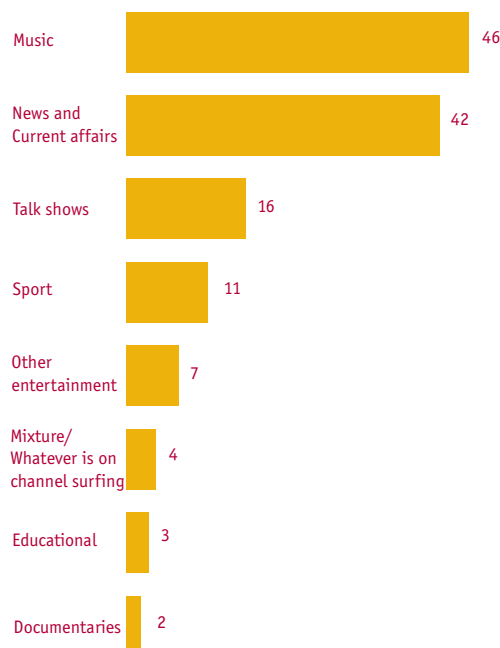
These results are reflected in the stated reasons for listening to Irish language radio programming, with the most popular reason identified by listeners being "to improve my Irish", reported by 35% of listeners. The three most popular explanations for listening to Irish language radio

FREQUENCY OF LISTENING TO TRISH LANGUAGE RADIO
BASE: ALL THOSE WHO LISTEN TO IRISH LANGUAGE RADIO (302)
%



Others at 1% or below: By chance through channel surfing, Cultural Reasons, None of these.

PREFERENCES FOR PROGRAMMING
BASE: ALL THOSE WHO LISTEN TO IRISH LANGUAGE RADIO (302)
%



Others at 1% or below: Debates, Weather forecasts, other, None of these, Don't Know

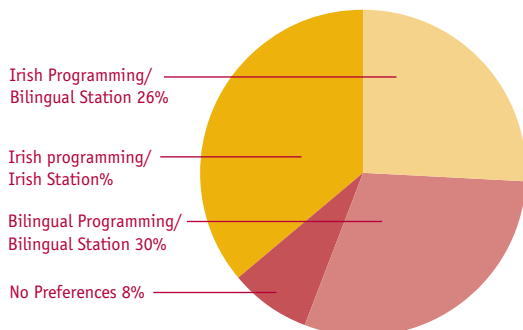
“to improve my Irish”, “for pleasure” and “to find out what’s happening in my community” accounted for 93% of all reasons given.

5.2 Programming & Delivery Preferences

In terms of programming preferences, listeners identify music (46%) and news (42%) as their two most favoured forms of programme. This is significant with regard to Irish language radio listeners’ stated preferences for the format in which they would like Irish language programming to be provided. As the chart below indicates, while 36% report that their preference is for Irish language radio programming on an Irish language radio station, 26% prefer monolingual programming on a bilingual radio station and a further 30% prefer bilingual programming on a bilingual radio station.

IRISH LANGUAGE RADIO PREFERENCES - FORMAT

BASE: ALL those who listen to Irish language radio (302)
%



These preferences are underlined by the fact that almost a quarter of Irish language radio listeners (23%) disagree that Raidió na Gaeltachta is the best place to develop the future of Irish language programming. A similar proportion (25%) feels that Raidió na Gaeltachta does not meet their needs as Irish language speakers. This is not to suggest that Raidió na Gaeltachta does not fulfil an important role. However, given the results reported here, there is a clear demand for alternatives to the level and type of Irish language radio programming currently provided.

The highly differentiated composition of the Irish language radio-listening cohort does have some implications for future Irish language broadcasting policy. Clearly, a one-size-fits-all approach cannot be considered appropriate in light of these results. With significant numbers of listeners considering their level of spoken Irish to be ‘*poor*’ or ‘*very poor*’ and the majority of Irish language radio listeners neither living in Gaeltacht areas nor involved in Irish language activities, it is important that the provision of Irish language programming reflects this. Exactly what type of service must be provided and to whom is analysed in greater detail later in this report.

6 Rejectors of Irish Language Radio

This section of the report is concerned with the opinions and preferences of those respondents who identified themselves as never listening to Irish language radio programming. Rather than simply discounting their opinions as irrelevant to future Irish language broadcasting policy, it will be demonstrated that a deeper analysis illustrates that this group is as heterogeneous in terms of their make-up as those who listen to Irish language radio are. In fact, as has been suggested previously, a significant proportion of these radio listeners should be considered, and consider themselves, to be potential Irish language radio listeners, whose needs are not met currently.

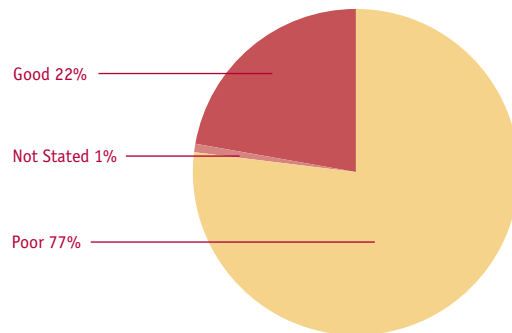
These respondents were asked for specific reasons as to why they did not listen to Irish language radio programming. This is presented before moving on to a comparison of rejectors' programming preferences with those of current listeners of Irish language radio, detailed in the following section.

6.1 Describing Rejectors of Irish Language Radio

In total, 75% of the population identify themselves as 'never' listening to Irish language radio. Looking at the composition of this group, it is again an older group, but not as to the same extent as the current Irish language radio listeners. 56% are in the 35+ age group with 44% in the 15-34 age group. There are two possible interpretations for the greater representation of young people in the rejectors' group, one being that young people are simply less interested in Irish language radio. Another possible interpretation might be that there is insufficient Irish language programming available to them.

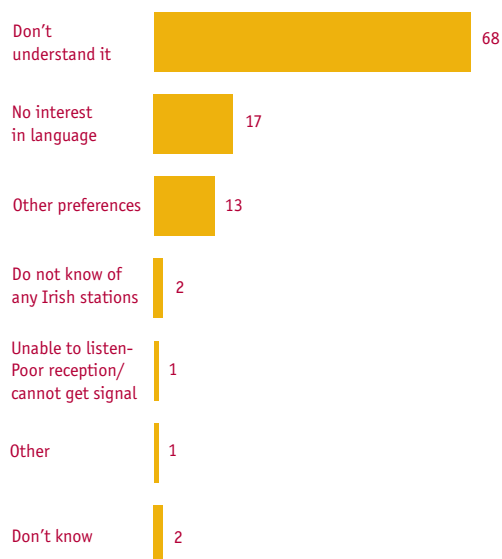
With regard to rejectors' involvement in Irish language activities and their level of spoken Irish, these are lower than the proportions found in the listeners group, as might be expected. However, it is still interesting to note that 5% of rejectors are involved in Irish language activities and that 22% of rejectors consider their level of Irish to be 'good' or 'very good'. Given that 46% of current listeners do not consider themselves to be this proficient, there are no grounds for assuming a strict linear relationship between proficiency in the language and a propensity to listen to Irish language radio.

LEVEL OF SPOKEN IRISH FOR REJECTORS
BASE: ALL those who don't listen to Irish language radio (302)
%



Nonetheless, it would seem that a lack of proficiency in the language is a real obstacle to the take-up of Irish language radio programming. The most popular explanation for not listening to Irish language radio programming is not being able to understand it, cited by 68% of this group. The second most popular explanation is that of "having no interest in the language", cited by 17% of rejectors. The preferences of this group are not relevant to this report.

REASONS FOR NOT LISTENING TO IRISH RADIO
BASE: ALL THOSE WHO DON'T LISTEN TO IRISH LANGUAGE RADIO (902)
%



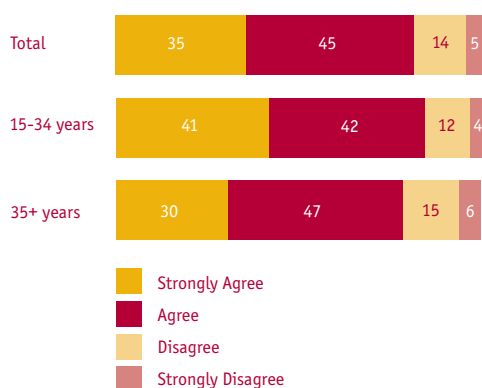
In addition to asking rejectors why they did not listen to Irish language radio, they were also presented with a series of simple statements to which they had to indicate their level of agreement or disagreement with. The first statement was: *“If I could understand the language, I would listen to Irish language radio programming”*. 80% of respondents reported that they agreed or strongly agreed with this statement. In response to the statement: *“If there was radio programming in Irish that wasn’t available in English, I would listen to Irish language radio programming”*, 51% of respondents reported that they agreed or strongly agreed with this statement.

However, the level of agreement with these statements must be treated with caution given the propensity for respondents to provide “socially desirable” answers in surveys of this nature, i.e. answers that they believe they should give rather than what they actually believe. Nonetheless, this concern can be tempered by the fact that there are clear differences in responses between rejectors when we take into account their age. Thus, as we can see from the chart below, there is a seven percentage point differential between those in

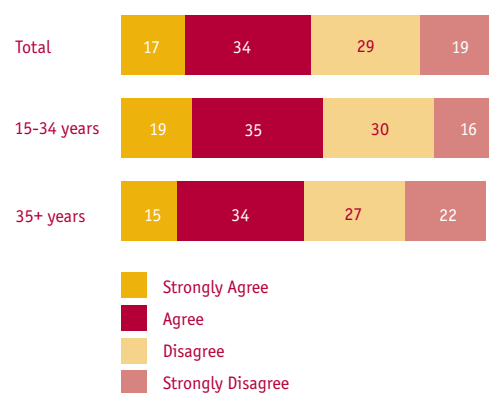
the 15-34 age group and those in the 35+ age group with respect to whether they would listen to Irish language radio programming if they could understand the language. 84% of 18-34 year olds respond positively in comparison to 77% of those in the 35+ age group. There are no grounds for presuming that more “socially desirable” answers will be provided by younger people, relative to the older cohort.

Given the fact that almost a quarter of ‘rejectors’ of Irish language radio programming claims some proficiency in the Irish language, we cannot state that a lack of proficiency is the only explanation for not listening to Irish language radio programming. Coupled with the fact that 46% of Irish language radio listeners report that their level of spoken Irish is ‘poor’ or ‘very poor’, there is no reason to presume that current rejectors would not listen to alternatives to current programming were such alternatives provided. The extent to which rejectors report an interest in a variety of Irish language programming options is examined in the next section.

AGREEMENT WITH “IF I COULD UNDERSTAND THE LANGUAGE, I WOULD LISTEN TO IRISH LANGUAGE RADIO PROGRAMMING”
BASE: ALL THOSE WHO DON’T LISTEN TO IRISH LANGUAGE RADIO (902)
%



AGREEMENT WITH “IF THERE WERE RADIO PROGRAMMING IN IRISH THAT WASN’T AVAILABLE IN ENGLISH, I WOULD LISTEN TO IRISH LANGUAGE RADIO”
BASE: ALL THOSE WHO DON’T LISTEN TO IRISH LANGUAGE RADIO (902)
%



7 Irish Language Radio Programming Preferences

The next section of the survey examined respondent preferences for Irish language radio programming. This involved presenting all respondents with a series of statements, relating to the types of programmes they would listen to and in what format, to which they were asked to indicate their level of agreement with the statements. For each statement, respondents were asked if they would listen to a particular type of programme wholly in Irish before being asked if they would listen to the same type of programme partially in Irish.

Aware of the potential for respondents providing “socially desirable” answers, i.e. that respondents would simply say that they would listen to Irish language programming, regardless of their actual intentions, the differentiation between monolingual and bilingual formats allows us to examine the differences between the two. It is reasonable to assume the reliability of responses from respondents who say that they would not listen to a particular type of programme wholly in Irish but would listen to a programme partially in Irish. This would indicate that respondents have considered their responses sufficiently to differentiate between the two possibilities.

7.1 Content Preferences

First, we will consider the overall level of responses to these statements before analysing the breakdown according to whether they currently listen to Irish language radio and by age group. This section will pay particular attention to those statements, where there are significant differences in the level of agreement with respect to related statements, or where there are differences between different groups with respect to the same statements.

Looking first at the overall level of response to the attitudinal statements, we can see that it is overwhelmingly positive. In terms of the different options provided, respondents were most favourable towards music programmes. For music programmes with English language music and Irish language links and chart shows with English language music and Irish language links, 84% and 73% respectively, of the total sample reported that they would listen to these shows. This can be contrasted with the 67% of the total sample that indicated that they would listen to a music programme with Irish language music and Irish language links. While these results should not be considered to be indicative of the proportion of the population that would necessarily listen to such programming were it to be made available, they clearly demonstrate the demand for English language music on Irish language music programmes.

These results are replicated in the other options assessed, concerning programming content and mode of delivery. For example, while only 28% of the total sample would listen to a phone-in show broadcast totally in Irish, 58% report that they would listen to one broadcast partially in Irish. Equally, whereas 50% report that they would listen to a news programme broadcast wholly in Irish, 71% indicate that they would listen to a news programme that was broadcast partially in Irish.

In all cases, programmes partially broadcast in Irish are more popular than the same programmes broadcast wholly in Irish. This suggests that there is significant latent demand for bilingual programming and, thus, an opportunity exists to increase the level of bilingual programming currently available to Irish radio listeners. This would seem preferable to ghettoising Irish language radio or unnecessarily restricting it to monolingual programming.

TABLE 2 - IRISH LANGUAGE RADIO PROGRAMMING PREFERENCES BY LISTENERSHIP

	Total % Agreement	Irish language audio listeners % Agreement	Rejectors of Irish language radio % Agreement
I would listen to a news programme broadcast wholly in Irish	50%	69%	43%
I would listen to a news programme broadcast partially in Irish	71%	81%	67%
I would listen to a music programme with Irish language music and Irish language links	67%	84%	62%
I would listen to a music programme with English language music and Irish language links	84%	87%	83%
I would listen to a phone-in show broadcast wholly in Irish	28%	43%	23%
I would listen to a phone-in show broadcast partially in Irish	59%	71%	54%
I would listen to a sports show broadcast wholly in Irish	37%	55%	31%
I would listen to a sports show broadcast partially in Irish	58%	70%	51%
I would listen to a chart show with English language music and Irish language links	73%	74%	73%
I would listen to Irish language radio for educational purposes	50%	65%	45%
I would listen to Irish language radio for entertainment purposes	50%	75%	42%

When we compare the content of current listeners against rejectors of Irish language radio programming, there is further support for the bilingual model as a means of increasing the audience reach of Irish language radio. For both groups, the pattern described above is repeated, with a clear preference for bilingual radio programming. However, the difference between the number who would listen to a particular type of programme broadcast wholly in Irish and those who would listen to the same programme broadcast partially in Irish is more marked for rejectors of Irish language radio.

For example, for current Irish language radio listeners, the difference between those who would listen to a news programme broadcast wholly in Irish and those who would listen to one broadcast partially in Irish is 12 percentage points. For rejectors of Irish language radio, the difference is more than double, at 24 percentage points. With regard to current Irish language radio listeners, the difference between those who would listen to a music programme with Irish language music and Irish language links and those who would listen to one with English language music, the difference is

a mere three percentage points. When one examines the preferences of rejectors of Irish language radio in terms of this choice, the difference is 21 percentage points, again emphasising the viability of bilingual programming to a mainstream audience.

When we disregard current Irish language radio listening and focus instead on the age of respondents, we again find some patterns that suggest that the provision of Irish language programming must reflect the differing needs of particular groups. Again, regardless of age, respondents are generally positive about their preferences for particular programmes. However, the clearest differences between the preferences of the different age groups appear with regard to music programmes.

With regard to those in the 35+ age group, the difference between the proportion of respondents who would listen to a music programme with Irish language music and Irish language links (71%) and those who would listen to one with English language music (81%) is exactly 10 percentage points.

TABLE 3 - IRISH LANGUAGE RADIO PROGRAMMING PREFERENCES BY AGE GROUP

	Total % Agreement	15-34 % Agreement	35+ % Agreement
I would listen to a news programme broadcast wholly in Irish	50%	50%	49%
I would listen to a news programme broadcast partially in Irish	71%	71%	71%
I would listen to a music programme with Irish language music and Irish language links	67%	61%	71%
I would listen to a music programme with English language music and Irish language links	84%	87%	81%
I would listen to a phone-in show broadcast wholly in Irish	28%	28%	28%
I would listen to a phone-in show broadcast partially in Irish	58%	60%	57%
I would listen to a sports show broadcast wholly in Irish	37%	35%	39%
I would listen to a sports show broadcast partially in Irish	56%	54%	57%
I would listen to a chart show with English language music and Irish language links	73%	81%	68%
I would listen to Irish language radio for educational purposes	50%	47%	52%
I would listen to Irish language radio for entertainment purposes	50%	49%	51%

When one examines the preferences of the 15-34 year olds in terms of this choice, the difference is 26 percentage points. 87% of 15-34 year olds express an interest in listening to an Irish language music programme with English language music and only 61% saying they would listen to an Irish language music programme playing exclusively Irish language music.

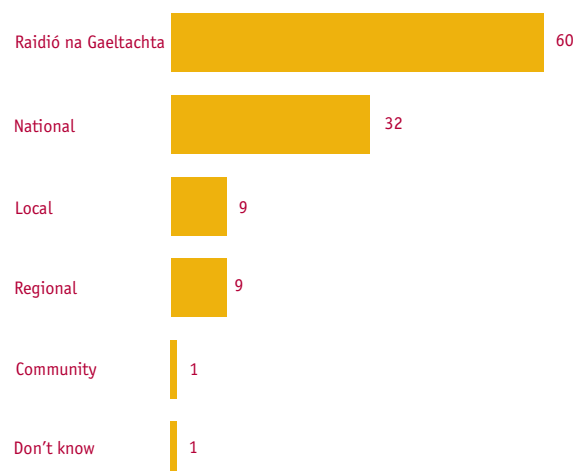
The difference between the age groups is again evident in terms of their preference for an Irish language chart show with English language music. 81% of 15-34 year olds say they would listen to such a show, compared to 68% of those in the 35+ age bracket.

The final aspect of programming preferences to be considered is the nature of the station that respondents would prefer to get their Irish language programming. As noted in the background section at the top of the report, a considerable amount of Irish language programming is delivered through community stations. While this must be commended, the stated preferences of respondents are overwhelmingly for national and local stations.

This is relevant in the context of the geographical distribution of current Irish language radio listeners, noted earlier, especially with regard to the large concentration of listeners in the Midlands.

PREFERENCES FOR TYPES OF STATION

BASE: ALL THOSE WHO LISTEN TO IRISH LANGUAGE RADIO (302)
%



8 Future of Irish Language Radio Programming

8.1 Introduction

Having described the preferences of both Irish language radio listeners and rejectors of Irish language radio, the purpose of this section is to present an analysis of responses to questions relating to the future development of Irish language broadcasting policy. Again, it is important to differentiate between responses from those who do listen to Irish language radio and those who do not, and also on the basis of age. This section will again concentrate on those statements where there are significant differences in the levels of response either between related statements or within the total response to an individual statement between particular sub-groups.

8.2 Overall

Looking at the overall level of agreement with statements relating to future Irish language broadcasting policy, responses are generally

positive. Again, the interesting aspects of these attitudes are not the raw figures but the differences between related options. Thus, a significantly greater number of people believe that the main aim of Irish language radio should be to capture new listeners in the future (89%) than believe it should concentrate on keeping its existing listeners (73%).

A similar difference, 18 percentage points, can be found between those who believe that the example of TG4 is a good model for the future of Irish language radio programming (89%) and those who believe that Raidió na Gaeltachta is the best place to develop the future of Irish language radio (70%). However, the greatest difference in terms of options for the future development of Irish language lies in whether Irish language programming should be restricted to dedicated Irish language radio stations (31%) or whether Irish language programming should be provided by all radio stations (78%).

8.3 Listeners vs. Rejectors

TABLE 4 - FUTURE OF IRISH LANGUAGE RADIO BY CURRENT LISTENERSHIP

	Total % Agreement	Irish language radio listeners % Agreement	Rejectors of Irish language radio % Agreement
The main aim of Irish language radio should be to concentrate on keeping its existing listeners in the future	73%	68%	74%
The main aim of Irish language radio should be to capture new listeners in the future	89%	95%	87 %
I would like to see an Irish language radio station just for young people	75%	78%	74%
I believe programming should be restricted to dedicated Irish language radio stations	31%	20%	35%
I believe all radio stations should provide some Irish language programming	78%	86%	75%
The example of TG4 is a good model for the future of Irish language radio programming	89%	95%	87%
Raidió Na Gaeltachta is the best place to develop the future of Irish language radio	70%	76%	68%

When we take into account whether respondents are current listeners of Irish language radio or rejectors of Irish language radio, there are some subtle differences. As will be indicated in the cluster analysis which follows this section, there appears to be a conservative element within rejectors of Irish language radio, who would like Irish language radio to remain as it is. These are Irish language radio advocates, who do not actually avail of Irish language radio programming.

This might explain why a higher proportion of rejectors of Irish language radio believe that Irish language radio should concentrate on keeping its existing listeners in the future (74%) than those who currently listen to Irish language radio (68%). A similar difference, in the opposite direction, can

be found between those rejectors who believe that the main aim of Irish language radio should be to capture new listeners in the future (87%) and current listeners who hold this view (95%). While this may appear to be counter intuitive, our cluster analysis reveals that a proportion of rejectors belong to this conservative cohort.

This conservatism is again reflected in the greater number of rejectors who believe that Irish language programming should be restricted to dedicated Irish language radio stations, 35%. This is significantly higher than the proportion of current Irish language radio listeners who subscribe to this view, a mere 20% of this cohort.

8.4 Variations by Age Group

TABLE 5 - FUTURE OF IRISH LANGUAGE RADIO BY AGE GROUP

	Total % Agreement	15-34 % Agreement	35+ % Agreement
The main aim of Irish language radio should be to concentrate on keeping its existing listeners in the future	73%	71%	74%
The main aim of Irish language radio should be to capture new listeners in the future	89%	91%	88%
I would like to see an Irish language radio station just for young people	75%	77%	73%
I believe programming should be restricted to dedicated Irish language radio stations	31%	31%	32%
I believe all radio stations should provide some Irish language programming	78%	78%	77%
The example of TG4 is a good model for the future of Irish language radio programming	89%	92%	87%
Raidió Na Gaeltachta is the best place to develop the future of Irish language radio	70%	70%	70%

Taking respondents' ages into account does not reveal any particularly significant differences, with one exception. As might be expected, younger respondents are less likely to support the policy of directing policy towards existing listeners (71%) than older respondents (74%). However, there is a 20 percentage point difference in the younger age group between agreement with this statement and agreement with the policy of capturing new listeners, which has 91% support among this cohort. The equivalent difference among older listeners between support for these policies is 14 percentage points.

Younger respondents are more likely to think TG4 is a good model for the future of Irish language radio programming (92%) than older respondents (87%). They are also more likely to support the establishment of an Irish language radio station just for young people (77%) than older respondents (73%). Nonetheless, the relatively high level of agreement between the age groups does indicate a mandate for the direction of future Irish language broadcasting policy.

Ultimately, in terms of the direction of future broadcasting policy, there is a clear mandate for expanding Irish language programming. The attitudes as to how it should be expanded are quite directional. It should be targeted towards new listeners, implemented across all radio stations, with more support for using TG4 as a model than Raidió na Gaeltachta to inform the development of this policy. This indication of a desire to see a younger and fresher approach to Irish language radio programming is reflected in the high level of agreement overall for the establishment of a dedicated Irish language radio station just for young people. Almost three-quarters (75%) of all respondents support the establishment of such a station.

9 Which group do you identify with?

This section gives an overview of the segmentation analysis which was carried out as part of this study. This type of analysis is frequently carried out by commercial organisations to see how and whether the population naturally groups into like-minded segments, sharing similar characteristics, as this assists in being able to target the product (in this case Irish Language radio programs) to and raise interest amongst the more receptive types of people, whilst understanding the reservations of those less positive groups. Questions used for this segmentation analysis were wide-ranging, covering peoples' attitudes towards and interest in Irish Language and Bilingual radio programs across Ireland, and these segments were related to the more general demographic and listening habits type questions.

Firstly a **Factor Analysis** was carried out which simplified the questions into four manageable themes. These themes were as follows (the questions which relate to / load on to each theme are listed in the accompanying EXCEL sheets):

- 1 Listening to Irish Language Programs (on a range of topics – e.g. sport, phone-in, news, education);
- 2 Seeing a need for more Irish language programs to be available;
- 3 Favourability towards Raidió na Gaeltachta (RnaG), and local radio;
- 4 Preference for bilingual radio.

The scores for each respondent on each of these four themes were calculated and a **Cluster (Segmentation) Analysis** was then performed on these theme scores. Technically, a hierarchical cluster analysis using Ward's method was first carried out to find the positions of the cluster centres for stability of the solution, then fine-tuning / allocation of respondents to these clusters was done using the k-means method. In the most meaningful solution, the sample split neatly into five segments, i.e.:

- 1 Conforming Conservatives;
- 2 Open-minded Bilingualists;
- 3 Generation Hector;
- 4 Core Irish Audience;
- 5 Disengaged Rejectors.

Finally we looked at the demographic profile of these five segments to provide a visual picture of the typical type of person which falls into each of these groups. Detailed profiles of these segments are given below. It should be pointed out that none of these groups are totally exclusive and that such a situation is hardly ever likely to happen when looking at human behaviour. Indeed, groups which are for example, 100% male-dominated are unlikely to occur in this type of analysis. The profiles point to general tendencies towards or relative "concentrations" of certain population sub-groups falling into these segments.

9.1 Key population segments

Conforming Conservatives – 25% of base.

This group is characterised by being the most favourably disposed towards RnaG and local radio, rather than national radio in general. They tend to be older, are the least likely group to use mobile phones or to have stayed in education after secondary school. They watch TG4 slightly more frequently than average and tend to read The Sun or The Star. Many people in this group listen to the radio at home, often for an hour or more at a time for education and sport. Crucially, although they are keen on the concept of listening to Irish language programs – particularly to find out what is happening in the community – and on the idea that Irish language radio should be provided and promoted, they are less keen on actually availing of these services, with only 26% ever listening to Irish language radio. This grouping can be interpreted as a strong conservative element on this issue, with a strong preference for the status quo – they feel that an element of Irish language radio is theoretically essential, but do not want anything more, or anything different, perhaps because they have no practical need for either existing or potential services. They are conforming conservatives in the sense that whilst they are in many ways disengaged from the practicalities of the Irish language generally, they are happy to express what they perceive to be nationally acceptable views on the future of the language and its development.

Open-minded Bilingualists – 27% of base.

In contrast to the Conforming Conservatives, these people are the least likely to listen to RnaG, and prefer other national radio to local radio. They are a relatively young, well-educated group (58% having tertiary or postgraduate-level qualifications), with better than average Irish Language skills. Many live in Dublin and have Broadband. They are likely to be heavy or moderate users of mobile phones, read the Independent and are far more likely to listen to contemporary music than Irish Traditional music. They are heavy radio users, and enjoy listening to music on the radio, typically for a one-hour period whilst travelling, and are the least likely to listen to the radio at home. They are as likely to listen to Irish Language radio as the bulk of the population, and when they do, it tends to be for pleasure. They also tend to watch TG4 more frequently than average, which is a further indication that this group is open to more Irish language programming (especially in a bilingual context, which TG4 often provides through subtitles), even if they do not see a need for this to happen – if the content is right for them, they will listen.

Generation Hector – 22% of base. Although people in this group are relatively unlikely to listen to Irish language radio themselves, they do, interestingly, see a need for more of such programmes to be available. People in this group are young, mostly female, and educated to secondary school level. They tend to listen to the radio at work for relatively long periods at a time (more than one hour) for “light” topics, such as Contemporary music, entertainment, chat rather than sport or news. It may be that these are relatively reluctant listeners of Irish Language radio in its current formats, and feel that they ought to do it to improve their Irish or for cultural reasons. A specific marketing opportunity to better penetrate this group might involve improving access and usability – there is a clear preference amongst this group for Irish language programming consisting of contemporary, English language music and Irish language links, either in a chart show or standard entertainment format.

Core Irish Audience – 14% of base. This small group represents the core of keen Irish language speakers and listeners. They see a definite need for Irish language broadcasting and are less interested in bilingual stations. They are by far the most likely to listen to Irish language broadcasting to keep in touch with the community and improve their Irish further. Demographically, they can be most abundantly found in Dublin and the Midlands (not so much in the South East) and are educated to tertiary level. They prefer Traditional Irish to Contemporary music and watch TG4 frequently. Typically, they listen to the radio in their home for about an hour at a time, more for news and education than music and entertainment.

Disengaged Rejectors – 12% of base. Like the Conforming Conservatives, this group is very unlikely to take an interest in Irish language broadcasting, but in contrast to them they do not feel that Irish language radio should be promoted or supported. In general, they class their Irish Language skills as “very poor” and they are older and more male-dominated than the general population. They have a light to moderate level of use of mobile phones and read The Irish Times rather than The Star or The Irish Independent. Their general level of radio listenership (and TG4 viewing) is low and restricted to short periods, usually whilst travelling, more for News and Information than music. If they do listen to Irish language radio, it is through an educational or work requirement or found by chance or simply for the music it provides. They are cynical in the sense that they have serious doubts about the role that Irish language radio should have to play in promoting the language, and indeed in terms of their opinions on the value of promoting the language at all.

10 Conclusions

While the results of this survey demonstrate that there is an appetite for Irish language radio programming, this is essentially an exploratory piece of research. In the absence of reliable data comparable to that provided by the Joint National Listenership Research, this research represents a valuable evidence base that can be used to inform Irish language broadcasting policy in the future.

Despite its exploratory nature, there are a number of clear conclusions that can be drawn from the research:

- Listenership figures for Irish language radio programming are encouraging, with a quarter of the population listening to Irish language radio, and 3% of the population listening to Irish language radio on a daily basis;
- Irish language radio listeners are an extremely heterogenous group, mostly living outside Gaeltacht areas and not necessarily proficient Irish speakers. Irish language radio programming must reflect this variety;
- Raidió na Gaeltachta is recognised as an important resource for Irish language radio, meeting the needs of the majority of Irish language radio listeners. However, there is clear potential for an alternative, with a specific Irish language broadcasting remit;
- Large groups of potential listeners must be targeted, such as those radio listeners involved in Irish language activities and proficient speakers of Irish who do not currently listen to Irish language radio must be targeted. Again, there is a clear mandate for such a policy;
- Irish language radio programming must take into account the geographical distribution of current listeners, with particular concentrations in the Midlands and Dublin and listeners' preference for local rather than community stations;
- With specific regard to music programmes, there is significant potential and support for Irish language programming playing English language music, specifically dedicated to the younger 15-34 age group;
- There is strong support for a much greater provision of bilingual programming across a variety of programme genres on all stations;
- There is a clear mandate for change in the way Irish language programming is delivered.

10.1 Recommendations for Further Research

It is recommended that the Irish Language Advisory Committee consider conducting research with rejectors of Irish language radio, who would conventionally be considered the core audience of Irish language radio, as noted above, to investigate in greater detail why they do not currently listen to Irish language radio.

It is also recommended that the Irish Language Advisory Committee investigate the specific needs of younger audiences whose programming preferences are insufficiently met by current provisions. This would add a further level of evidence for the mandated Irish language radio station for young people.

©MORI Ireland

245293

Technical Details

Methodology

MORI Ireland interviewed 1,203 people by telephone, between 29th October and 20th November 2004. Quotas were set by age, gender, region and on the number of Gaeltacht respondents. Data are weighted to match the profile of the population. It should be noted that a sample, not the entire population of the Republic of Ireland, has been interviewed. This means that all results are subject to sampling tolerances, and that not all differences are statistically significant (see below).

Interpretation of the Data

In the computer tables, an asterisk (*) represents a value below 0.5%, but above zero. Where responses do not add up to 100%, this may be due to computer rounding or multiple responses. Statistically significant results are marked on the computer tables. The term “net”, which is used in this report, is the balance when a negative finding has been subtracted from the positive. For example, if 40% agree or strongly agree with a particular statement and 20% disagree or strongly disagree, the “net” agreement score is +20%.

Statistical Reliability

The respondents to the questionnaire are only a sample of the total “population”, so we cannot be certain that the figures obtained are exactly those we would have obtained if everybody had been interviewed (the “true” values). However, we can predict the variation between the sample results and the “true” values from a knowledge of the size of the samples on which the results are based and the number of times that a particular answer is given. The confidence with which we can make this prediction is usually chosen to be 95%, that is, the chance are 95 in 100 that the “true” value will fall within a specified range. The table below illustrates the predicted ranges for different sample sizes and percentage results at the 95% confidence interval, assuming a random sample.

	Sampling tolerances applicable to results at or near these percentages (based on 95% confidence level)		
	10/90%	30/70%	50%
Sample size	±%	±%	±%
100	6	9	10
300	3	5	6
500	3	4	4
750	2	3	4
1,000	2	3	3

For example, with the sample size of 1,200 used in this survey, where 30% give a particular answer, the chances are 19 in 20 that the “true” value (which would have been obtained if

the whole population had been interviewed) will fall within the range of +- 3 percentage points from the sample result.

When results are compared between separate groups, different results may be obtained. The difference may be “real” or it may occur by chance because not everyone in the population has been interviewed. To test if the difference is a real one i.e. if it is “statistically significant”, we again have to know the size of the samples, the percentage giving a certain answer and the degree of confidence chosen. For example, if we are comparing two samples/bases of 200, assuming a 95% confidence interval, the difference between the two sample results must be greater than ten percentage points to be statistically significant, if the findings being compared are around 50%.

	Differences required for significance Size of sample compared at or near these percentage levels		
	10/90%	30/70%	50%
Sample sizes	+%	+%	+%
100 and 100	8	13	14
100 and 200	7	10	12
100 and 300	7	10	11
100 and 400	7	10	11
200 and 200	6	9	10
200 and 300	5	8	9
200 and 400	5	8	9
500 and 500	4	5	6

BCI Irish Language Radio Programming Survey

MORI Ireland

Results of study BCILE at Fri Nov 19 10:03:56 2004
Out of 1524 cases, 1203 passed the filter, 321 were excluded

Question INTRO

Good [+pod+], my name is [+me+] and I'm calling from MORI Ireland, an independent research company. I am conducting research on behalf of the Broadcasting Commission of Ireland, on the subject of public radio listening habits and preferences. This research is extremely important and will contribute to the future development of radio broadcasting in Ireland. I was wondering whether you had a few minutes to answer some questions for me?

Question QD1

Did you listen to the radio yesterday?

	N	%
1. Yes	1202	100.0

Question QD2

Gender quota

	N	%
1. Male	496	41.2
2. Female	707	58.8

Question QD3

Ageband

	N	%
1. 15-34	401	
2. 35+	802	

Question QD4

In which of these regions do you live?

	N	%
1. Dublin	200	16.6
2. Cork/Kerry	201	16.7
3. South East	200	16.6
4. Connaught/Ulster	199	16.6
5. Midlands	202	16.8
6. Mid West	200	16.6

Question QD5

Do you live in an Irish speaking / Gaeltacht area?

	N	%
1. English speaking area	996	82.9
2. Irish speaking/Gaeltacht area	207	17.1

Question Q4

What is your highest level of education achieved?

		N	%
1.	Primary	137	11.4
2.	Secondary	536	44.6
3.	Tertiary/Third level	427	35.5
4.	Postgraduate	99	8.2
	Don't Know	1	0.1
	Refused	2	0.2

Question Q5

How would you describe your level of spoken Irish?

		N	%
1.	Very good	93	7.7
2.	Quite good	303	25.2
3.	Quite poor	422	35.1
4.	Very poor	374	31.1
	Don't Know	7	0.6
	Refused	3	0.2

Question Q6

Are you involved in Irish language activities?

		N	%
1.	Yes	124	10.3
2.	No	1078	89.7

Question Q7

With regard to mobile phone usage, how many mobile phone calls/texts would you make on average every day?

		N	%
1.	Heavy use (more than 20 calls/texts on average a day)	107	8.9
2.	Moderate use (between 20 & 10 calls/texts on average a day)	194	16.1
3.	Light use (between 10 & 1 calls/texts on average a day)	624	51.9
4.	No use (less than 1 call/text on average a day)	276	23.0
	Refused	1	0.1

Question Q8

With regard to internet usage, how long would you spend online on average every day?

		N	%
1.	Heavy use (more than 4 hours online on average a day)	23	1.9
2.	Moderate use (between 4 & 2 hours online on average a day)	77	6.4
3.	Light use (go online once a day on average, for less than two hours)	358	29.8
4.	No use (less than once a day on average)	742	61.7
	Don't Know	2	0.2

Question Q9

Do you have broadband internet access at home?

		N	%
1.	Yes	149	12.4
2.	No	1053	87.6

Question Q10

What type of music do you listen to most?

		N	%
1.	Classical music (Classical, Choral, Opera)	154	12.8
2.	Traditional Irish music	191	15.9
3.	Contemporary music (Pop, Rock, Jazz, Blues, Folk, Dance, Rap, etc..)	831	69.1
4.	None	26	2.2

Question Q11

What daily newspaper do you read most often?

		N	%
1.	The Sun	84	7.0
2.	The Irish Independent	382	31.8
3.	The Irish Mirror	40	3.3
4.	The Star	133	11.1
5.	The Irish Times	212	17.6
6.	The Examiner	85	7.1
7.	Any Irish language newspaper	1	0.1
8.	Other (specify)	162	13.5
	Don't Know	4	0.3
	No answer	99	8.2

Question Q12

Have you ever watched TG4 / Teilifis Na Gaeilge?

		N	%
1.	Yes	1035	86.1
2.	No	167	13.9

Question Q12A

How often do you watch TG4?

		N	%
1.	Daily	222	21.4
2.	4-5 times a week	105	10.1
3.	2-3 times a week	312	30.1
4.	Once a week	209	20.2
5.	Less than once a week	186	18.0
	Don't Know	1	0.1

Question Q13

How often do you listen to the radio?

		N	%
1.	Daily	1120	93.2
2.	4-5 times a week	45	3.7
3.	2-3 times a week	34	2.8
4.	Once a week	0	0.0
5.	Less than once a week	3	0.2

Question Q14

When you are listening to the radio, how long would you typically listen for?

RECORD ANSWER IN MINUTES (1 HOUR = 60 MINUTES)

1 min, 1440 max, 156.67 mean

	N	%
Don't know	7	0.6

Question Q14R

Would it be ...?

		N	%
1.	More than an hour	576	47.9
2.	About an hour	257	21.4
3.	Less than an hour	368	30.6
	Don't Know	1	0.1

Question Q15

Where would you mainly listen to the radio?

		N	%
1.	At home	648	53.9
2.	At work	151	12.6
3.	At school	2	0.2
4.	Travelling to work/school	400	33.3
	Don't Know	1	0.1

Question Q16

Why do you listen to the radio. Is it for?

		N	%
1.	Entertainment	870	72.4
2.	Information	805	67.0
3.	Education	280	23.3
4.	Other (specify)	69	5.7
	Don't Know	1	0.1

Question Q17

What sort of programmes do you listen to on the radio?

		N	%
1	Music	730	60.7
2.	Other entertainment	171	14.2
3.	News & Current Affairs	694	57.7
4.	Sport	174	14.5
5.	Talk shows	654	54.4
6.	Educational	112	9.3
7.	Other (specify)	67	5.6
	No answer	1	0.1

Question Q18

When listening to the radio, which of the following types of stations do you listen to?

		N	%
1.	National	877	73.0
2.	Regional	140	11.6
3.	Local	580	48.3
4.	Community	29	2.4
5.	Internet	14	1.2
6.	TV/Radio	28	2.3
	Don't Know	2	0.2

Question Q19A**How often do you listen to Irish language radio?**

		N	%
1.	Daily	63	5.2
2.	4-5 times a week	17	1.4
3.	2-3 times a week	53	4.4
4.	Once a week	84	7.0
5.	Less than once a week	135	11.2
6.	Never	850	70.7

Question Q19B**Why not?**

		N	%
1.	No interest in language	120	14.1
2.	Other preferences	99	11.6
3.	Don't understand it	579	68.1
4.	Other (specify)	71	8.4
	Don't Know	14	1.6

Question Q19C**If I could understand the language, I would listen to Irish language radio programming**

		N	%
1.	Strongly Agree	291	34.2
2.	Agree	388	45.6
3.	Disagree	113	13.3
4.	Strongly Disagree	49	5.8
	Don't Know	9	1.1

Question Q19D**If there was radio programming in Irish that wasn't available in English, I would listen to Irish language radio programming**

		N	%
1.	Strongly Agree	145	17.1
2.	Agree	305	35.9
3.	Disagree	228	26.8
4.	Strongly Disagree	164	19.3
	Don't Know	8	0.9

Question Q20**When you are listening to Irish language radio, how long would you typically listen for?**

RECORD ANSWER IN MINUTES

1 HOUR = 60 MINUTES

0 min, 360 max, 39.07 mean

Question Q20R

Would it be?

		N	%
1.	More than an hour	34	9.7
2.	About an hour	61	17.3
3.	Less than an hour	257	73.0

Question Q21

Where would you mainly listen to Irish language radio?

		N	%
1.	At home	221	62.8
2.	At work	18	5.1
3.	At school	2	0.6
4.	Travelling to work/school	111	31.5

Question Q22

Why do you listen to Irish language radio, is it ...?

		N	%
1.	Because it's a school requirement	7	2.0
2.	Because it relates to my work	6	1.7
3.	For pleasure	90	25.6
4.	To improve my Irish	111	31.5
5.	To find out what's happening in my community	133	37.8
6.	Other (specify)	61	17.3
	Don't Know	1	0.3
	No answer	1	0.3

Question Q23

What sort of programmes do you listen to, when listening to Irish language radio?

		N	%
1.	Music	151	42.9
2.	Other entertainment	19	5.4
3.	News & Current Affairs	181	51.4
4.	Sport	48	13.6
5.	Talk shows	61	17.3
6.	Educational	10	2.8
7.	Other (specify)	30	8.5
	Don't Know	3	0.9
	No answer	2	0.6

Question Q24

When listening to Irish language radio, what type of station do you normally listen to?

		N	%
1.	National	87	24.7
2.	Regional	20	5.7
3.	Local	35	9.9
4.	Community	5	1.4
5.	Raidio na Gaeltachta	232	65.9
	Don't Know	3	0.9

Question Q26 (1)

How strongly do you agree or disagree with this statement
I would listen to a news programme broadcast wholly in Irish

		N	%
1.	Strongly Agree	220	18.3
2.	Agree	405	33.7
3.	Disagree	304	25.3
4.	Strongly Disagree	270	22.5
	Don't Know	3	0.2

Question Q26 (2)

How strongly do you agree or disagree with this statement...?
I would listen to a news programme broadcast partially in Irish

		N	%
1.	Strongly Agree	314	26.1
2.	Agree	562	46.8
3.	Disagree	205	17.1
4.	Strongly Disagree	116	9.7
	Don't Know	5	0.4

Question Q26 (3)

How strongly do you agree or disagree with this statement
I would listen to a music programme with Irish language music and Irish language links

		N	%
1.	Strongly Agree	319	26.5
2.	Agree	496	41.3
3.	Disagree	250	20.8
4.	Strongly Disagree	135	11.2
	Don't Know	2	0.2

Question Q26 (4)

How strongly do you agree or disagree with this statement

I would listen to a music programme with English language music and Irish language links

		N	%
1.	Strongly Agree	393	32.7
2.	Agree	618	51.4
3.	Disagree	129	10.7
4.	Strongly Disagree	55	4.6
	Don't Know	7	0.6

Question Q26 (5)

How strongly do you agree or disagree with this statement?

I would listen to a chart show with English language music and Irish language links

		N	%
1.	Strongly Agree	316	26.3
2.	Agree	562	46.8
3.	Disagree	183	15.2
4.	Strongly Disagree	133	11.1
	Don't Know	8	0.7

Question Q26 (6)

How strongly do you agree or disagree with this statement?

I would listen to a phone-in show broadcast wholly in Irish

		N	%
1.	Strongly Agree	125	10.4
2.	Agree	248	20.6
3.	Disagree	442	36.8
4.	Strongly Disagree	387	32.2

Question Q26 (7)

How strongly do you agree or disagree with this statement

I would listen to a phone-in show broadcast partially in Irish

		N	%
1.	Strongly Agree	179	14.9
2.	Agree	545	45.3
3.	Disagree	300	25.0
4.	Strongly Disagree	174	14.5
	Don't Know	4	0.3

Question Q26 (8)

How strongly do you agree or disagree with this statement
. I would listen to a sports show broadcast wholly in Irish

	N	%
1. Strongly Agree	157	13.1
2. Agree	299	24.9
3. Disagree	324	27.0
4. Strongly Disagree	415	34.5
Don't Know	7	0.6

Question Q26 (9)

How strongly do you agree or disagree with this statement
. I would listen to a sports show broadcast partially in Irish

	N	%
1. Strongly Agree	202	16.8
2. Agree	457	38.0
3. Disagree	259	21.5
4. Strongly Disagree	276	23.0
Don't Know	8	0.7

Question Q26 (10)

How strongly do you agree or disagree with this statement
I would listen to Irish language radio for entertainment purposes

	N	%
1. Strongly Agree	212	17.6
2. Agree	428	35.6
3. Disagree	336	28.0
4. Strongly Disagree	223	18.6
Don't Know	3	0.2

Question Q26 (11)

How strongly do you agree or disagree with this statement
I would listen to Irish language radio for educational purposes

	N	%
1. Strongly Agree	231	19.2
2. Agree	402	33.4
3. Disagree	340	28.3
4. Strongly Disagree	227	18.9
Don't Know	2	0.2

Question Q37

Which of the following statements best describes your current Irish language radio listening preferences?

	N	%
1. Irish language radio programming on an Irish language radio station	204	17.0
2. Irish language radio programming on a bilingual radio station	223	18.6
3. Bilingual radio programming on a bilingual radio station	402	33.4
4. None	358	29.8
Don't Know	15	1.2

Question Q38 (1)

How strongly do you agree or disagree with this statement

The aim of Irish language radio programming should be to concentrate on keeping its existing listeners in the future

	N	%
1. Strongly Agree	385	32.0
2. Agree	512	42.6
3. Disagree	218	18.1
4. Strongly Disagree	86	7.2
Don't Know	1	0.1

Question Q38 (2)

How strongly do you agree or disagree with this statement?

The aim of Irish language radio programming should be to capture new listeners in the future

	N	%
1. Strongly Agree	526	43.8
2. Agree	545	45.3
3. Disagree	93	7.7
4. Strongly Disagree	30	2.5
Don't Know	8	0.7

Question Q38 (3)

How strongly do you agree or disagree with this statement?

I would like to see an Irish language radio station just for young people

	N	%
1. Strongly Agree	413	34.4
2. Agree	501	41.7
3. Disagree	183	15.2
4. Strongly Disagree	94	7.8
Don't Know	11	0.9

Question Q38B (4)

If there were an Irish language radio station just for young people, I would be most likely to tune into: (in order of preference)

		N	%
1.	National	542	45.1
2.	Regional	102	8.5
3.	Local	344	28.6
4.	Community	26	2.2
5.	Internet	19	1.6
6.	TV/Radio	84	7.0
	Don't Know	37	3.1
	No answer	48	4.0

Question Q38 (5)

How strongly do you agree or disagree with this statement

I believe there should be more entertainment programming in Irish

		N	%
1.	Strongly Agree	384	31.9
2.	Agree	559	46.5
3.	Disagree	175	14.6
4.	Strongly Disagree	69	5.7
	Don't Know	15	1.2

Question Q38 (6)

How strongly do you agree or disagree with this statement?

I believe there should be more education programming in Irish

		N	%
1.	Strongly Agree	407	33.9
2.	Agree	555	46.2
3.	Disagree	164	13.6
4.	Strongly Disagree	62	5.2
	Don't Know	14	1.2

Question Q38 (7)

How strongly do you agree or disagree with this statement?

I believe Irish language programming should be restricted to dedicated Irish language radio stations

		N	%
1.	Strongly Agree	143	11.9
2.	Agree	234	19.5
3.	Disagree	461	38.4
4.	Strongly Disagree	356	29.6
	Don't Know	8	0.7

Question Q38 (8)

How strongly do you agree or disagree with this statement?

I believe all radio stations should provide some Irish language programming

		N	%
1.	Strongly Agree	415	34.5
2.	Agree	531	44.2
3.	Disagree	161	13.4
4.	Strongly Disagree	92	7.7
	Don't Know	3	0.2

Question Q38 (9)

How strongly do you agree or disagree with this statement?

The example of TG4/Teilifis Na Gaeilge is a good model for the future of Irish language radio programming

		N	%
1.	Strongly Agree	575	47.8
2.	Agree	502	41.8
3.	Disagree	63	5.2
4.	Strongly Disagree	34	2.8
	Don't Know	28	2.3

Question Q47

How strongly do you agree or disagree with this statement?

Raidio na Gaeltachta is the best place to develop the future of Irish

		N	%
1.	Strongly Agree	328	27.3
2.	Agree	541	45.0
3.	Disagree	212	17.6
4.	Strongly Disagree	78	6.5
	Don't Know	43	3.6

Question Q48

How strongly do you agree or disagree with this statement?

Raidio na Gaeltachta meets my needs as an Irish language speaker

		N	%
1.	Strongly Agree	195	16.2
2.	Agree	401	33.4
3.	Disagree	269	22.4
4.	Strongly Disagree	143	11.9
	Don't Know	194	16.1

Question Q49

How strongly do you agree or disagree with this statement?

Irish language radio programming should be promoted fully by the government

		N	%
1.	Strongly Agree	543	45.2
2.	Agree	425	35.4
3.	Disagree	145	12.1
4.	Strongly Disagree	71	5.9
	Don't Know	18	1.5

Question Q50

Is there one particular type of radio programme that you would be more likely to listen to in Irish than others?

		N	%
1.	Music	404	33.6
2.	Chart show	54	4.5
3.	Sport	141	11.7
4.	News	123	10.2
5.	Talk-show	100	8.3
6.	Educational	36	3.0
7.	Other (specify)	113	9.4
	Don't Know	39	3.2
	No answer	192	16.0

Question Q52

Which of the following statements best describes your opinion on the promotion of the Irish language?

	N	%
1.Promoting the Irish language is important to the country as a whole, but not to me personally	363	30.2
2.Promoting the Irish language is important to me personally, but not for the country as a whole	43	3.6
3.Promoting the Irish language is important to both me personally and the country as a whole	712	59.2
4.Promoting the Irish language is not important	82	6.8
No answer	2	0.2

Question QDAY Day of week

		N	%
1.	Sunday	0	0.0
2.	Monday	198	16.5
3.	Tuesday	184	15.3
4.	Wednesday	170	14.1
5.	Thursday	172	14.3
6.	Friday	132	11.0
7.	Saturday	347	28.8

Question QLEN

Length of interview in minutes

2 min, 59 max, 12.67 mean

Question IQCS

INTERVIEWER: DON'T READ OUT!!!

I declare that this interview is a true record and it has been conducted within the Market Research Society code of conduct

BCI, 2-5 Warrington Place,
Dublin 2

website www.bci.ie

tel 01 676 0966

fax 01 676 0948

email info@bci.ie