

Media Central March Listener Survey

In the field: 24th – 25th March 2020

Objective:

1. Gauge consumer sentiment in Ireland during COVID 19 pandemic
2. Analyse changes in listenership behaviour since COVID 19 outbreak

Number of Respondents: 6,335

Format: Online survey across Today FM, Newstalk, 98FM, SPIN1038 & SPIN South West.



Rialtas na hÉireann
Government of Ireland



Introduction:

Consumer Sentiment and Habits since the outbreak of COVID-19

The full impact of Covid-19 on our economy is still untold but what is clear is that it will have a hugely negative effect on almost all businesses and sectors across the country of Ireland.

Given that Radio is an incredibly responsive and trusted medium. We felt it was only right that we utilise these strengths to provide some insight on the market for the companies we work with to assist in the tough decisions that lie ahead and allow them to find the opportunities in the market. This is why we commissioned this piece of research which received 6,000+ responses over a 48hr period on the 24th & 25th March.

Across all our stations, the programming teams are working hard to keep Ireland informed, entertained and most importantly be a source of trust. Radio is one of most accessible and trusted mediums in which people have and will continue to turn to in these uncertain times.

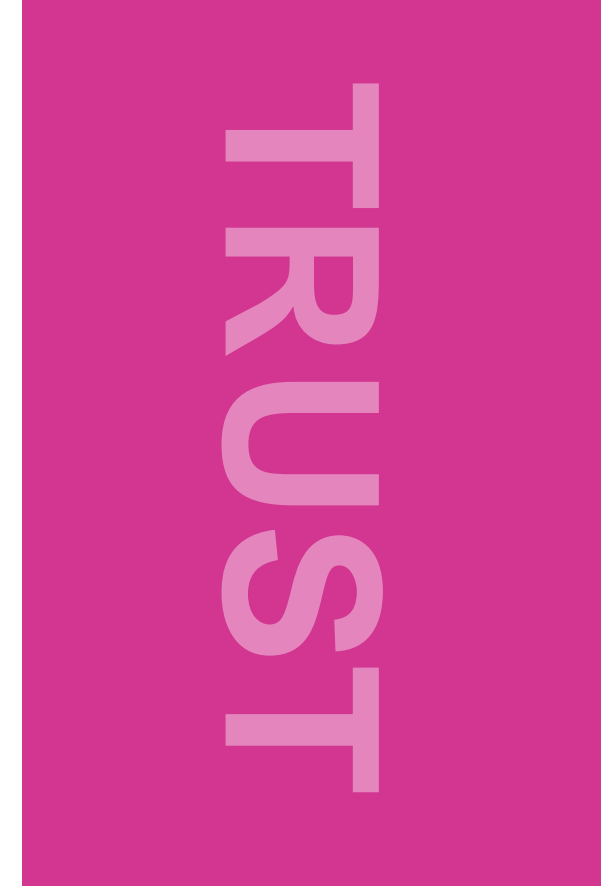


68% of people in **Ireland** trust **radio***

*“Our **journalists and broadcasters** who are helping us inform and educate the public”*

*“Please rely only on information from trusted sources, from Government, the HSE, the World Health Organisation and from the **National Media**”*

Taoiseach Leo Varadkar
St. Patrick’s Day Address
17th March, 2020



Radio Listenership Update

Since the outbreak, Communicorp Media radio has seen **significant listenership growth.**

Reach has grown by **34%**

People are listening **45%** longer

Generating a **44%** increase in listening

App downloads have grown by **47%**

Plus **54%** increase in smart speaker listening



March Listener Survey



Consumer Insights



Key Point Summary

While some behaviours are continuing as before, this promises to bring about many changes

A majority (87%) continue to grocery shop instore, but we have seen online now highest among older consumers (55+).

60% of all consumers are saying that the current situation will likely see them change their shopping habits and shop online more in general

It is a time of threat and opportunity

Many consumers are reviewing their finances and providers – in mobile (11%), insurance (10%) and gas electricity (9%), about 1 in 10 is actively considering switching supplier at the moment, higher again among those 35-54

It remains important to keep communicating – consumers are listening more than ever

Media engagement is high at the moment – on radio, people have increased their listening with almost 78% of people are listening the same or more to live radio

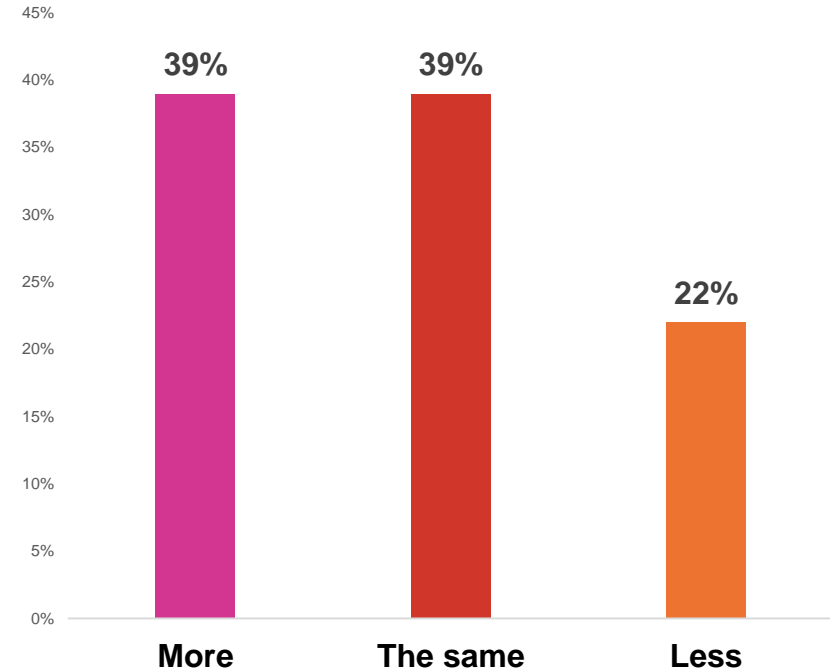
And even in tough times, Irish people remain open to giving

73% of people surveyed are still open to charity donations – in addition to some of the usual popular organisations (Alone, Irish Cancer Society) lots of people are also talking about helping frontline healthcare workers (e.g. feed the heroes)

Are you listening to more or less live radio?

People are listening more than ever to radio

Almost 8 in 10 are listening to as much or more live radio than ever during this period. This is higher again among those 35-54, so it is a time when the nation is listening closer than ever

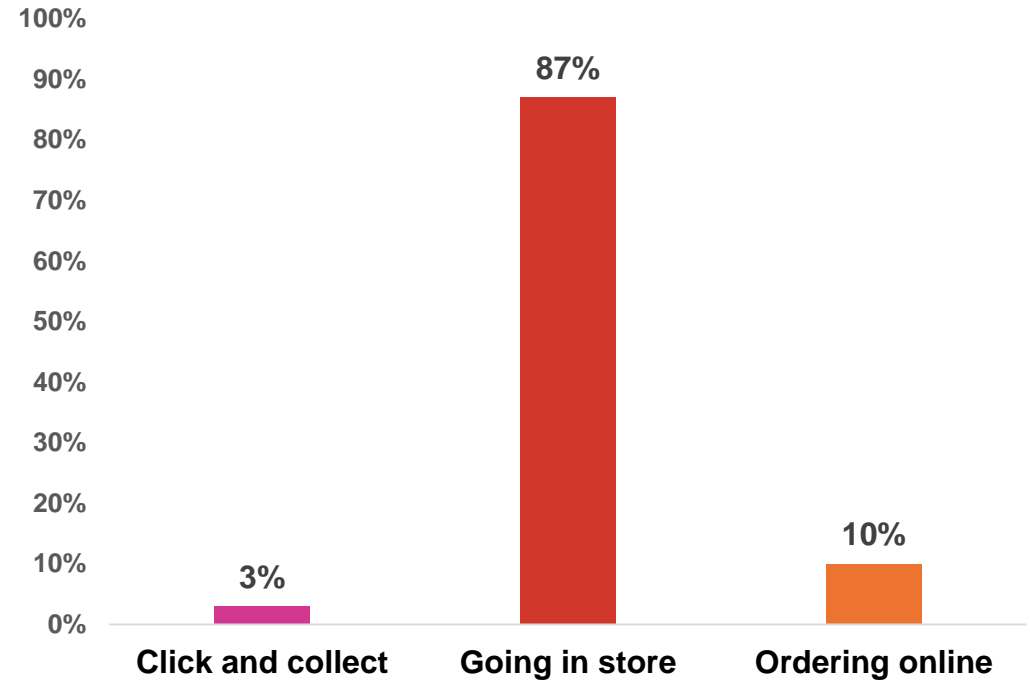


Retail - Grocery

How are you currently managing your food shop?

Most still going in-store

A majority report still going in store for their food shop, although we have seen a higher proportion of older people (55+) ordering online (14%)

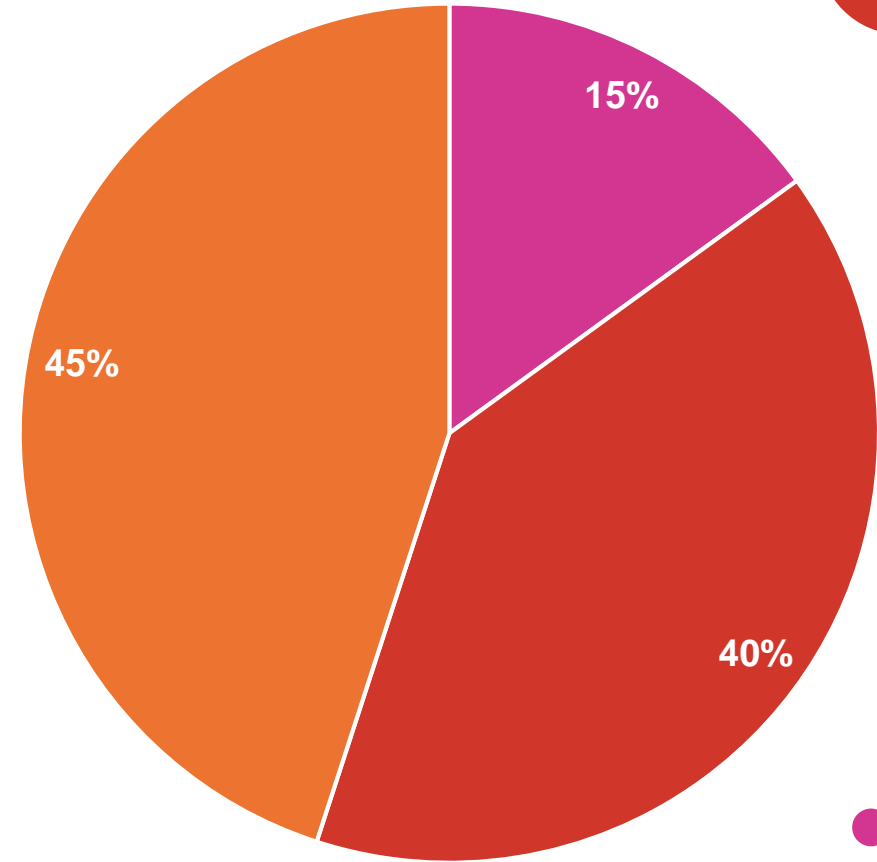


Retail - Grocery

Where are you shopping?

Could the top up shop become more prominent as consumers movement is restricted

The results show that the overwhelming majority still shop with the large multiples, Tesco 37%, Aldi 30%, Supervalu 29%, Lidl 24%, Dunnes 23%, Centra 12%



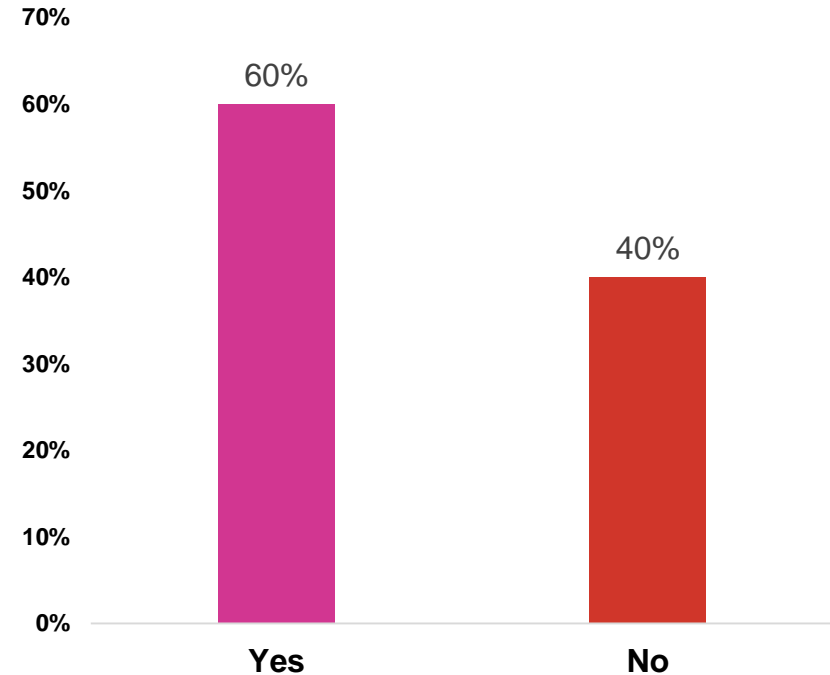
■ Local Shop ■ Mixture of Both ■ Supermarket

Retail Habits

Is the current situation likely to change your shopping habits and see you shop online more?

We may see lasting change

A majority feel that they are going to shift their shopping online more. While this is most pronounced among younger age groups and in Dublin, even among those 55+ over 40% say they are likely to shop more online

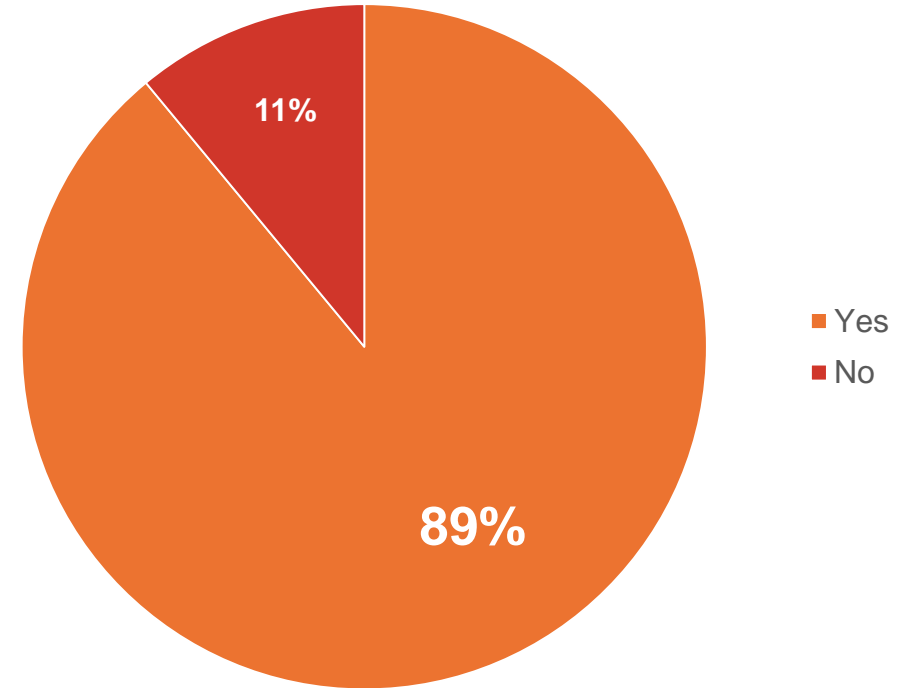


Online Retail

Are you continuing to shop online?

Business continues online

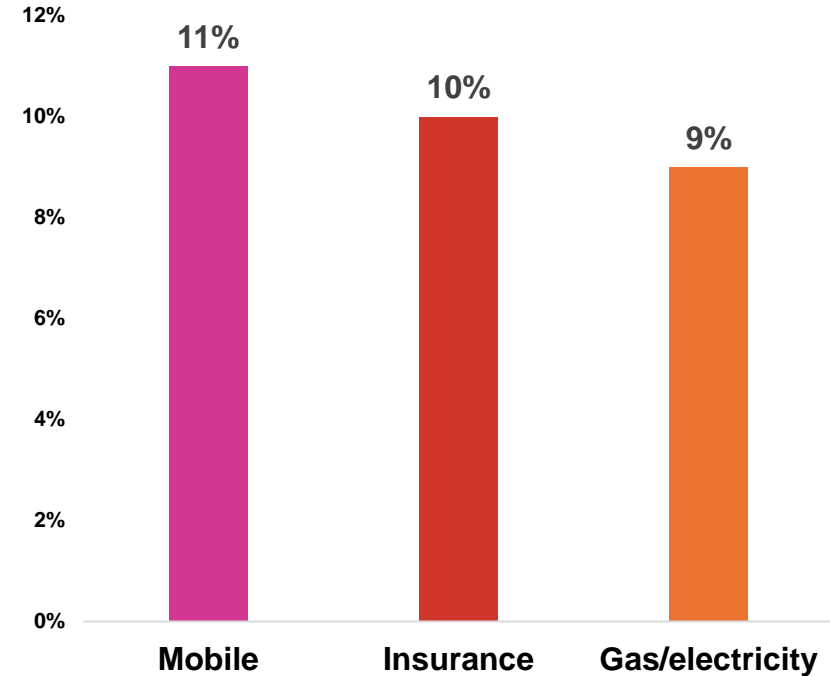
The vast majority are continuing to spend online, the leading categories for spend being clothing and accessories (54%), cosmetics/beauty/hair (24%) and stationary/books/wholesale (19%)



Are you currently considering switching provider?

Risk and opportunity in customer churn

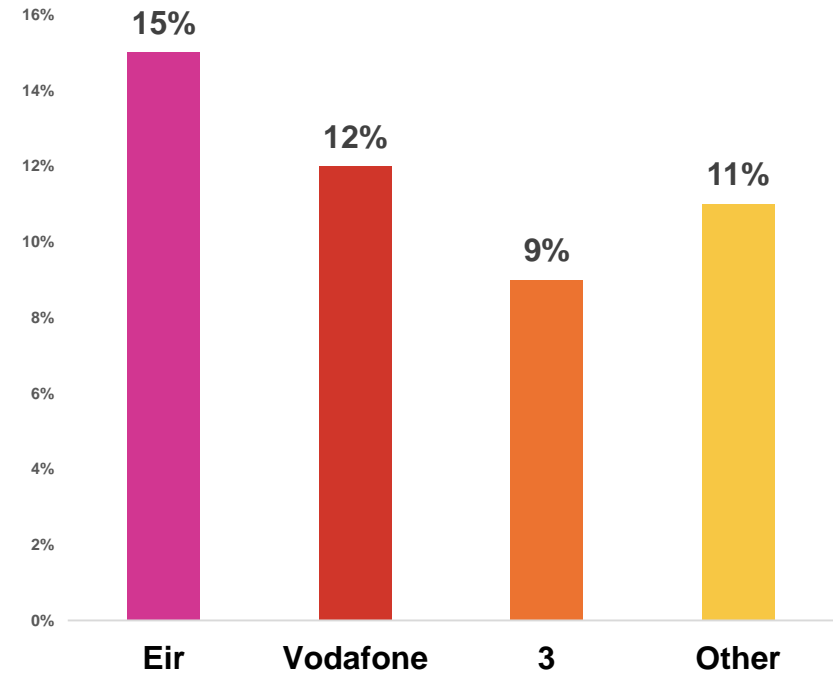
Across categories, **about 1 in 10** are actively looking to switch provider. With many squeezed financially, some are looking around for a better deal – both a threat and an opportunity for many businesses.



Likelihood to switch provider – mobile customers

1 in 7 of those aged 35-44 are likely to consider switching

At 15%, Eir customers are most likely to switch. For all providers, those aged 35-44 are those most looking to switch – 15% across providers compared to 11% for the full population

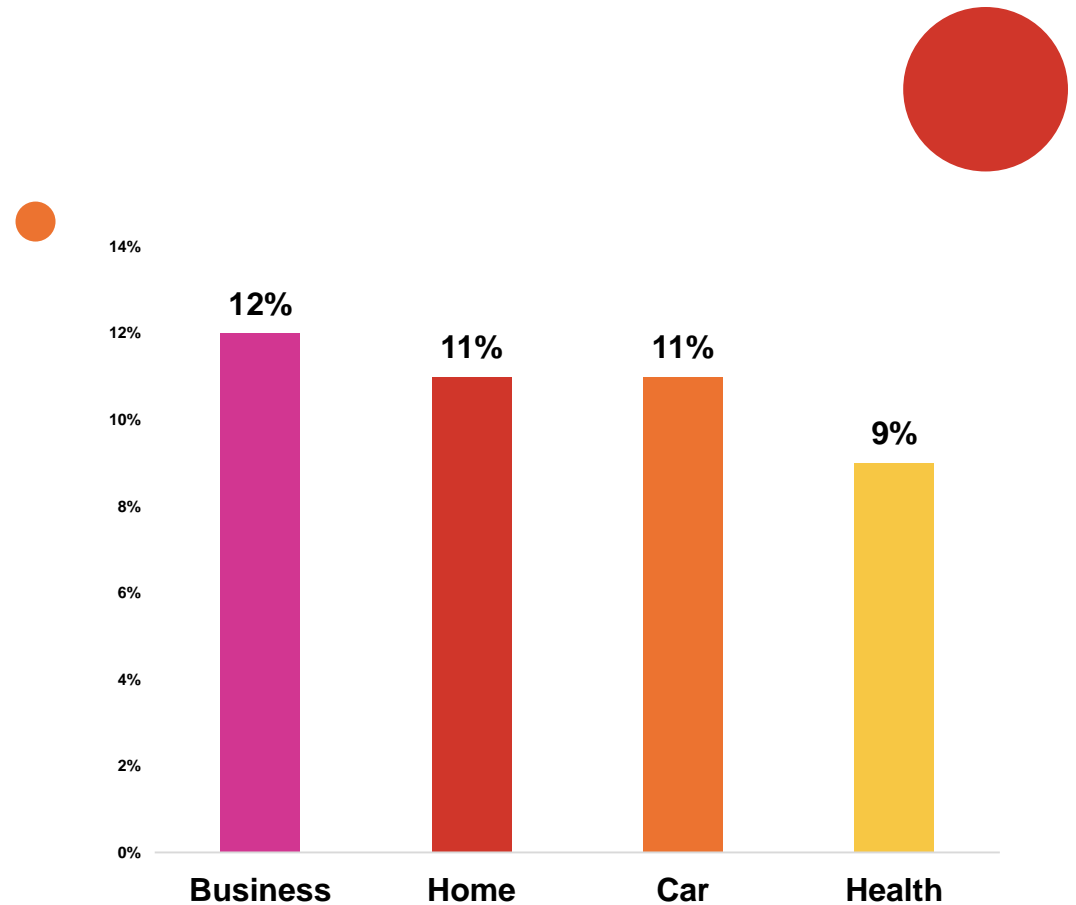


| Total | 18-24 | 25-34 | 35-44 | 45-54 | 55+ |
|-------|-------|-------|-------|-------|-----|
| 11% | 9% | 12% | 15% | 12% | 14% |

Likelihood to switch provider – insurance

35-44's reviewing provider choice most

About 1 in 10 looking to switch overall, but this rises among young to mid families in particular, with 15% of the 35-44 age group likely to switch

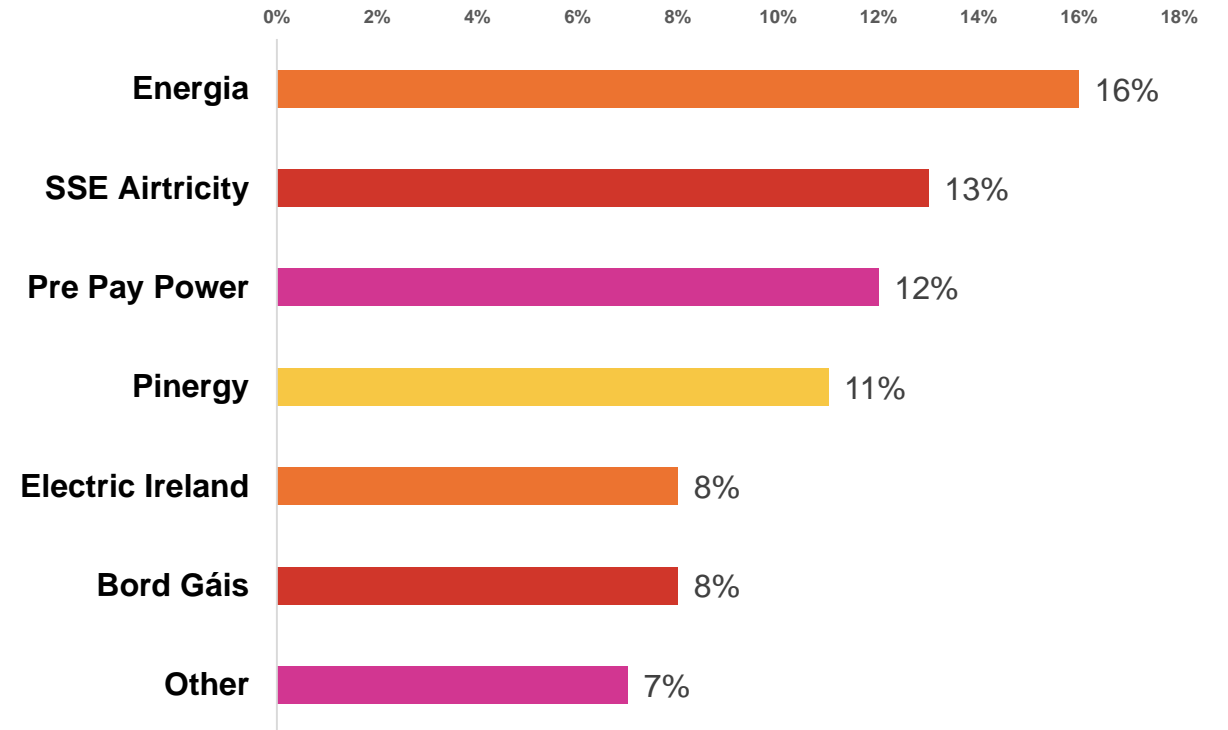


| Total | 18-24 | 25-34 | 35-44 | 45-54 | 55+ |
|-------|-------|-------|-------|-------|-----|
| 10% | 6% | 10% | 15% | 12% | 11% |

Likelihood to switch provider – gas/electricity

1 in 6 of those aged 35-54 are likely to consider switching

Electric Ireland and Bord Gáis customers are least likely to switch their gas/electricity provider, with Energia and SSE Airtricity customers keenest to change.

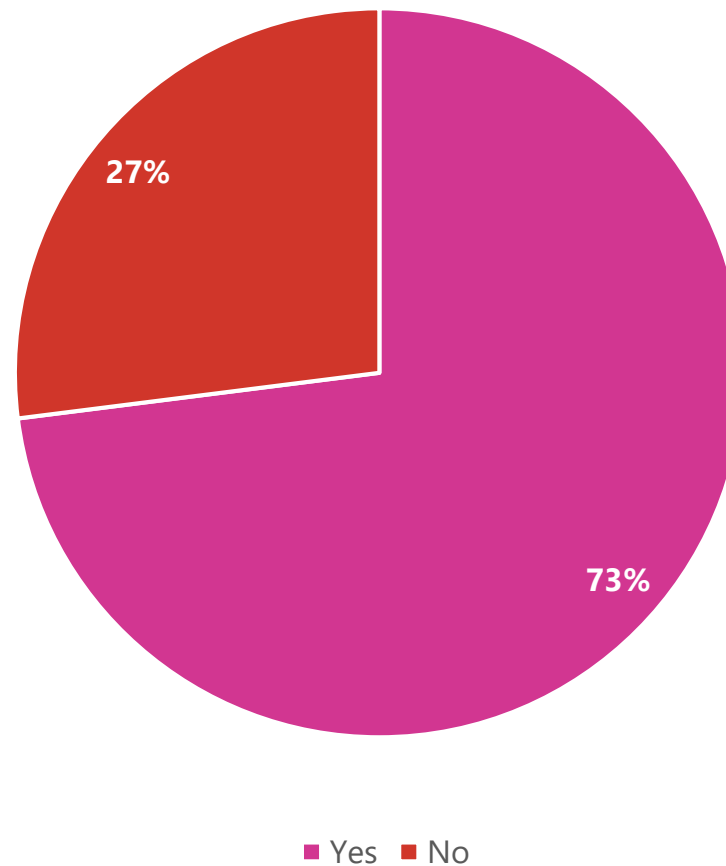


| Total | 18-24 | 25-34 | 35-44 | 45-54 | 55+ |
|-------|-------|-------|-------|-------|-----|
| 9% | 3% | 9% | 17% | 17% | 14% |

In these challenging times would you consider donating to a charity?

3 in 4 still open to donating

While some people have said they are too squeezed themselves at the moment to donate, a majority are still willing to give money. This included a range of charity types, with lots of mentions for some of the most popular charities such as Alone and the Irish Cancer Society. However, we also saw a lot of mentions for people willing to help the frontline HSE workers, including #feedtheheroes





Thank you

For more information please contact your account manager

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