

RADIO ACTIVITY DURING CORONAVIRUS

OMNIPOLL APRIL 2020

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INTRODUCTION

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BACKGROUND AND METHODOLOGY

- Telephone (CATI) survey conducted via Ipsos MRBI's Omnipoll service on behalf of the JNLR Committee
- 1,009 interviews conducted nationwide among a representative sample of individuals aged 15+
- Research conducted following the closure of schools, and restrictions on movement across the entire population, due to the Coronavirus outbreak
- Survey conducted to provide visibility on radio listening activity in this period and to understand the impact on behaviour in the radio market since restrictions were put in place
- Survey conducted between 1st - 13th April 2020, (excluding Easter Sunday)

SUMMARY OF MAIN FINDINGS

- The JNLR Committee commissioned Ipsos MRBI to conduct a telephone (CATI) survey conducted via Ipsos MRBI's Omnipoll service. The research was conducted following the closure of schools and the restrictions on movement that were placed on the entire population due to the Coronavirus outbreak. 1,009 interviews were conducted nationwide among a representative sample of individuals aged 15+, during the period 1st to 13th April 2020. The survey was conducted to provide visibility on radio listening activity in this period and to understand the impact on listening behaviour among the population since restrictions were put in place.
- In this period there were significant levels of listening to radio – four in every five respondents (80%) listened to radio yesterday, increasing to 91% within the past week and 96% within the past four weeks. In terms of population numbers this equates to c 3,750,000 radio listeners in the past four weeks.
- Since restrictions were put in place, there are evident changes in behaviour among radio listeners. Listeners perceive they are spending more time listening to radio across most devices. In particular, one-third say they are listening to more radio at home on the FM/DAB radio, 19% to more radio on a mobile device and 11% on a smart speaker. Among the 25-44 age group – a large proportion of whom are employed and have children in the home, these changes are also evident – 35% are listening to more radio at home on the FM/DAB radio, 24% to more radio on a mobile device, 15% more on a smart speaker and 15% listening to more catch-up radio.
- On balance, there is less time spent listening in the car and on the pc, unsurprising as restrictions have severely disrupted our travel, commute and working behaviours.

SUMMARY OF MAIN FINDINGS

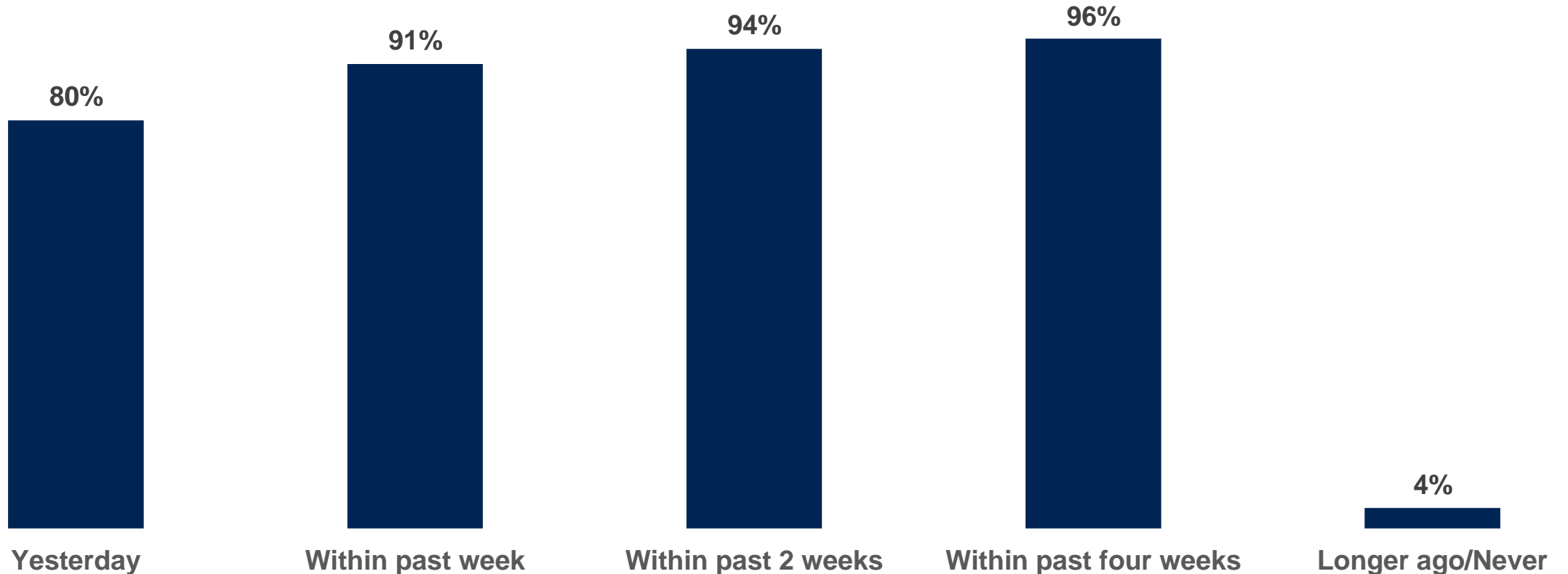
- Radio's core strengths are evident in this time of restrictions – listeners are tuning in for news and information, to keep up to date on issues relating to Coronavirus and as always, for the music.
- In this time of emergency radio is trusted more than ever. Significant levels of trust in radio were expressed in terms of providing information that is relevant on the Coronavirus crisis. On a scale of 1 to 10, where 10 equals “*I trust completely*”, radio scores extremely well on this issue achieving a 7.9 rating score, similar to TV but significantly higher than the rating for social media platforms – Twitter, 3.4, Facebook, 2.9, WhatsApp, 2.8 and Instagram, 2.7. A similar pattern emerges for the 25-44 age group – the rating for radio among this group is also 7.9.
- Similarly the population feels much more connected to radio than to social media by virtue of the relevant information provided on the Coronavirus emergency. In this context, radio achieves a rating of 7.5, compared to WhatsApp, 3.3, Facebook, 3.2, Twitter, 3.2 and Instagram 2.9. Once again, a similar pattern emerges for the younger 25-44 age group – among this group the radio rating is 7.2, significantly higher than for the social media platforms.
- Overall, significant levels of listening to radio across all age cohorts. There is evidence of changed behaviour with more listening happening at home and on the various devices available. Radio is trusted to a high degree to provide accurate and relevant information and in so doing has made a connection with listeners across the country.

FINDINGS

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REGENCY OF LISTENING TO RADIO

Significant levels of listening to radio – four in every five respondents (80%) listened to radio yesterday, increasing to 91% within the past week and 96% within the past four weeks.



Q.1 Apart from today, when did you last listen to or hear anything on the radio?
Base: All Respondents 15+: 1009

LISTENING TO RADIO - WITHIN THE PAST WEEK

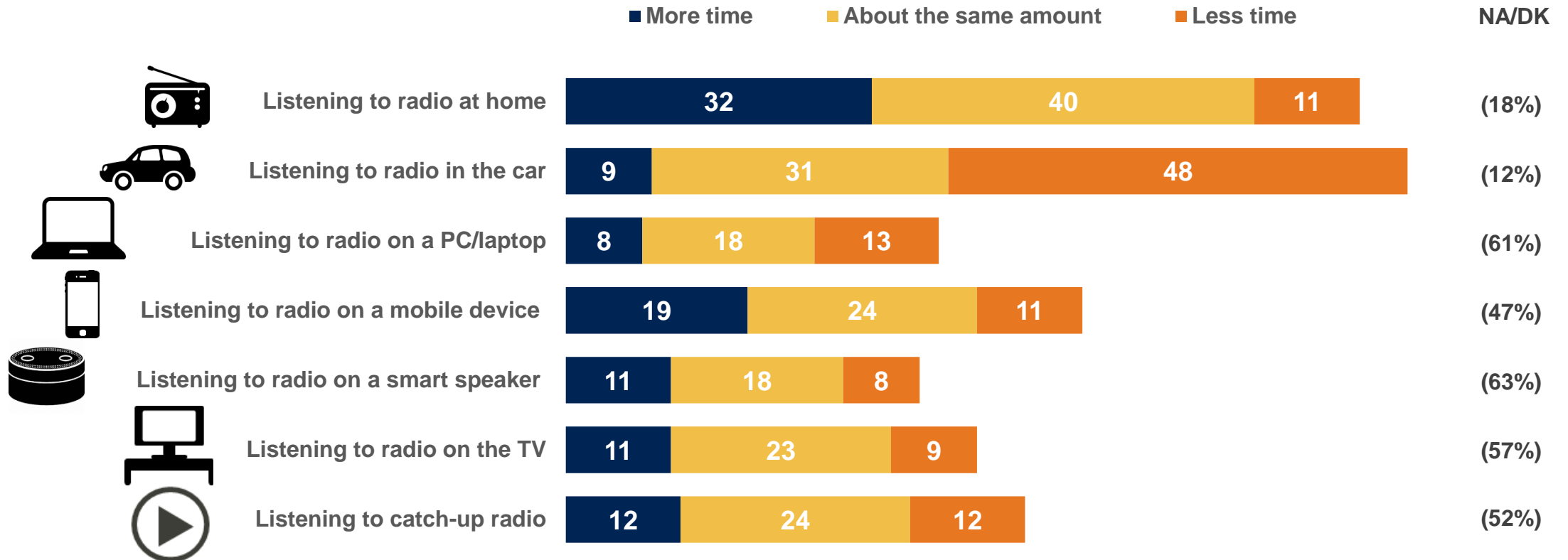
Vast majority of the population tuned into radio in the past week – significant levels of listening across all age cohorts



Q.1 Apart from today, when did you last listen to or hear anything on the radio?
Base: All Respondents 15+: 1009

CHANGES IN LISTENING BEHAVIOUR SINCE CLOSURE OF SCHOOLS

Evident changes in behaviour among radio listeners who claim more time spent listening across many devices and formats. Less listening in the car, unsurprising with restrictions on movement in place

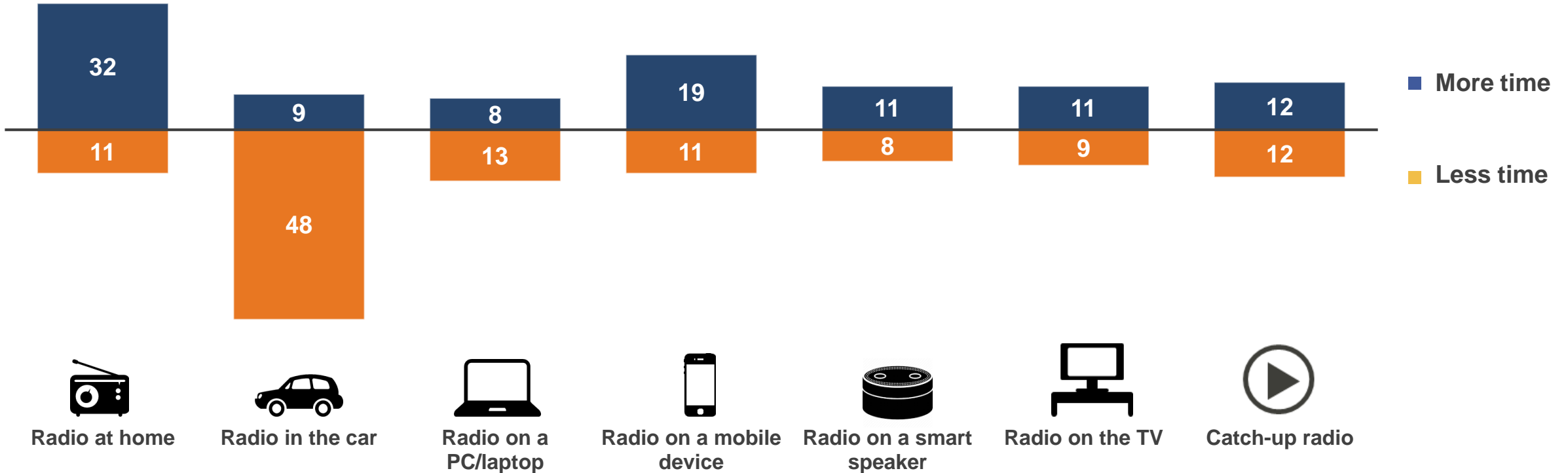


Q.2 Thinking about each of the following ways to listen to radio, are you spending more time, less time or about the same amount of time doing each one since the schools closed on 12th March?

Base: All who listened to radio in past 4 weeks: 969

CHANGES IN LISTENING BEHAVIOUR SINCE CLOSURE OF SCHOOLS

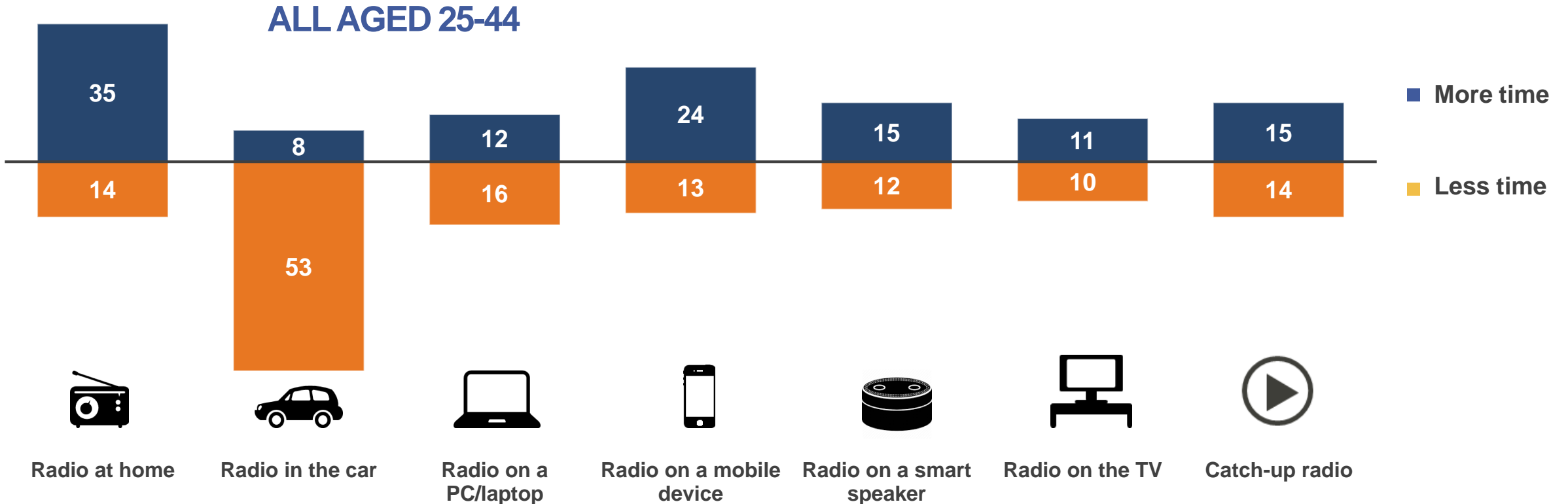
Perception that more time is spent on radio across many devices and formats, particularly on the radio at home (+32%) and on mobile devices (+19%). On balance, less time spent on radio in car and on pc - restrictions have disrupted our travel and work behaviours



Q.2 Thinking about each of the following ways to listen to radio, are you spending more time, less time or about the same amount of time doing each one since the schools closed on 12th March?
 Base: All who listened to radio in past 4 weeks: 969

CHANGES IN LISTENING BEHAVIOUR SINCE CLOSURE OF SCHOOLS

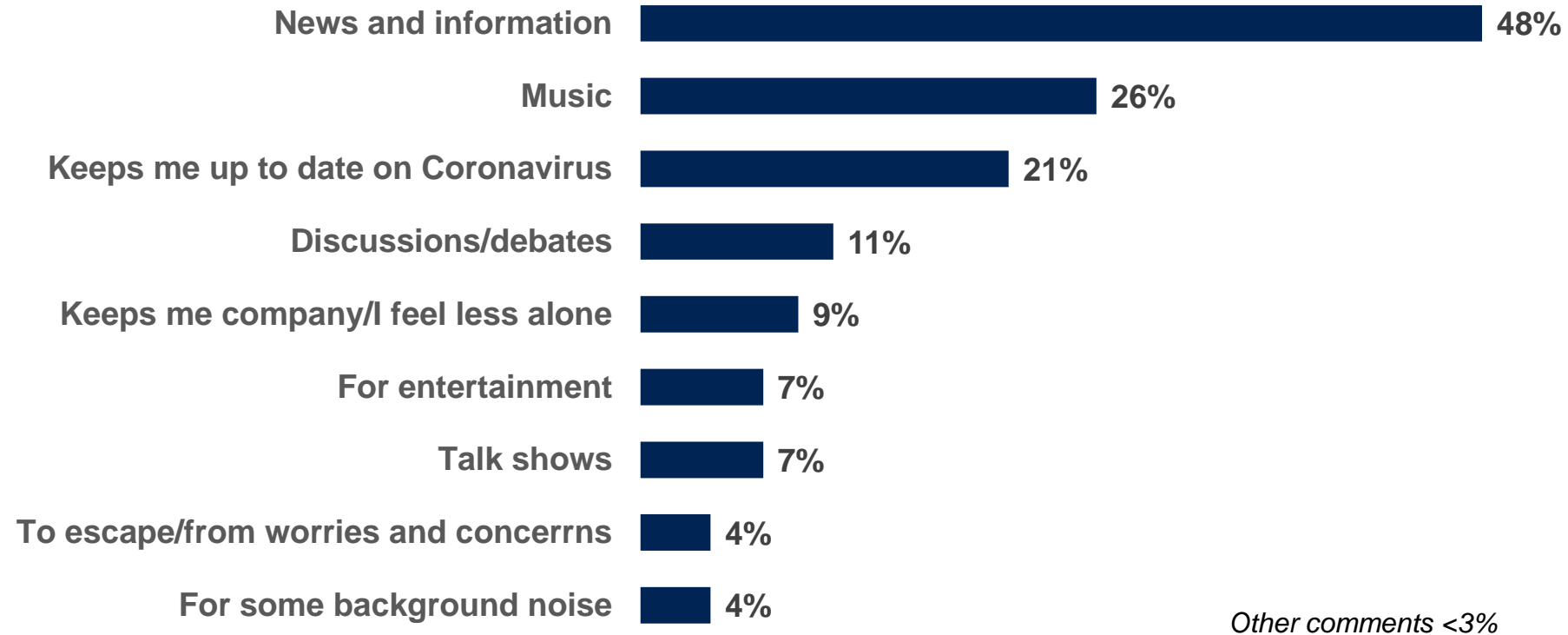
Similar pattern emerges for the younger 25-44's, a significant proportion of whom normally work. This group more likely to have children, many tackling task of home-schooling. More than one-third are listening more at home on FM/DAB, one-quarter on mobile device, 15% via smart speaker and catch-up



Q.2 Thinking about each of the following ways to listen to radio, are you spending more time, less time or about the same amount of time doing each one since the schools closed on 12th March?
 Base: All aged 25-44 who listened to radio in past 4 weeks: 350

MAIN REASONS FOR LISTENING TO RADIO IN PAST FEW WEEKS

Radio's core strengths evident in this time of restrictions – listeners are tuning in for news, music and to keep up to date on issues relating to Coronavirus

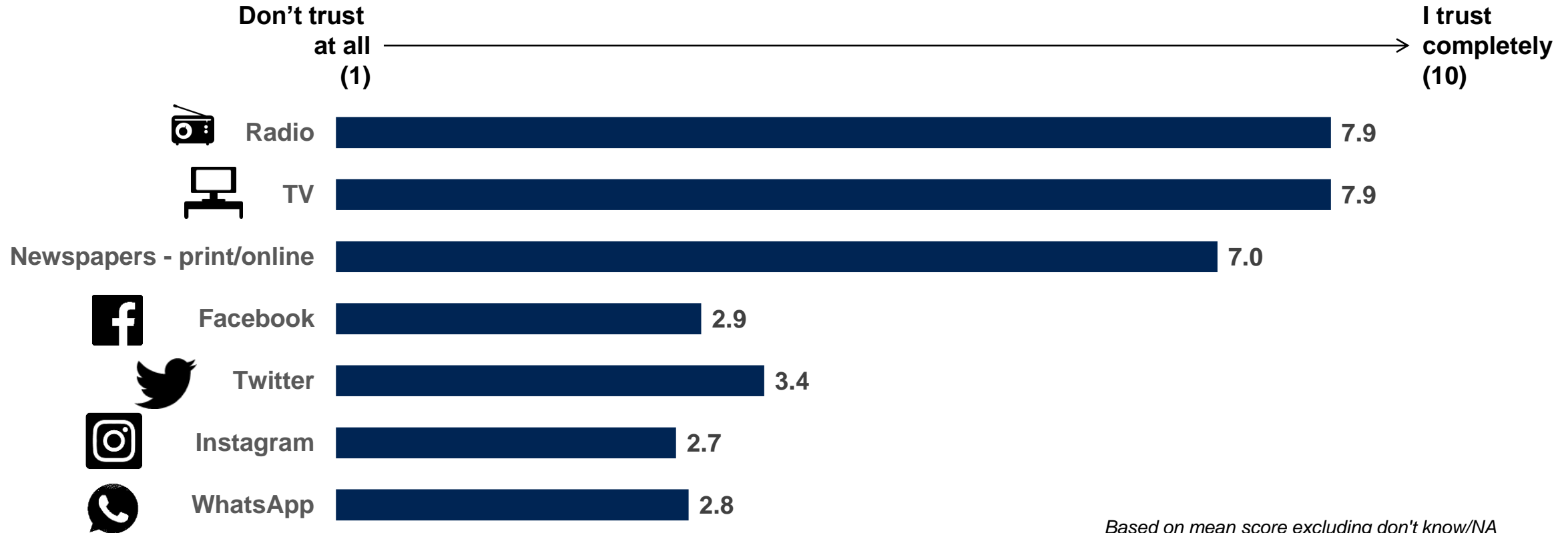


Q.3 Thinking about the last four weeks or so - since the schools closed on March 12th - what is your main reason for listening to radio?

Base: All who listened to radio in past 4 weeks: 969

TRUST IN MEDIA AND SOCIAL MEDIA

Significant levels of trust in Radio, TV and Print in terms of providing information on coronavirus that is relevant to audiences - social media platforms are largely not trusted in this regard



Based on mean score excluding don't know/NA

Q.5 On a scale from 1 to 10, where 1 = "I don't trust at all" and 10 = "I trust completely", how would you rate the following media and social media in terms of providing you with information on Corona / Covid-19 that is relevant to you?

Base: All Respondents 15+: 1009

TRUST IN MEDIA AND SOCIAL MEDIA

Similar patterns emerge for 25-44 year olds. High levels of trust in Radio, TV and Print compared to social media platforms.

ALL AGED 25-44

Don't trust
at all
(1)

I trust
completely
(10)



Radio

7.9



TV

7.8



Newspapers - print/online

7.0



Facebook

2.7



Twitter

3.6



Instagram

2.7



WhatsApp

2.6

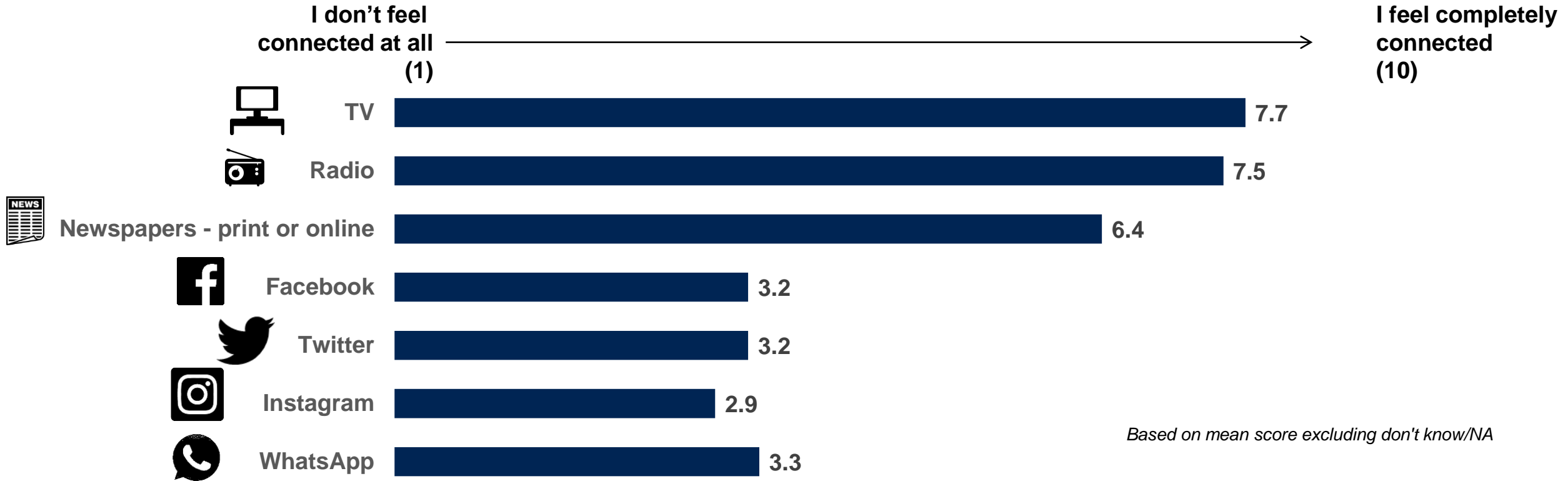
Based on mean score excluding don't know/NA

Q.5 On a scale from 1 to 10, where 1 = "I don't trust at all" and 10 = "I trust completely", how would you rate the following media and social media in terms of providing you with information on Corona / Covid-19 that is relevant to you?

Base: All Respondents 25-44: 350

CONNECTION WITH MEDIA AND SOCIAL MEDIA

Once again Radio strongly connects with audiences in terms of Coronavirus information, as does TV and Print compared to social media platforms



Based on mean score excluding don't know/NA

Q.6 And on a scale from 1 to 10, where 1 = "I don't feel connected at all" and 10 = "I feel completely connected" how would you rate the following media and social media in terms of making a connection with you by providing information on Corona / Covid-19 that is relevant to you?

Base: All Respondents 15+: 1009

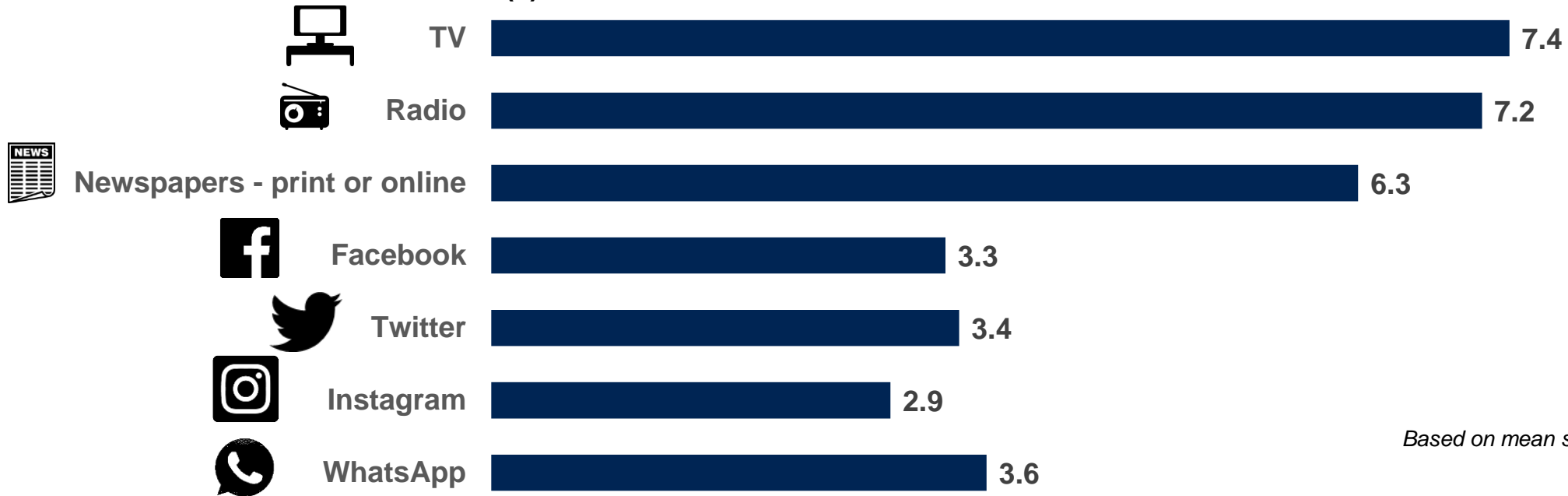
CONNECTION WITH MEDIA AND SOCIAL MEDIA

Among the younger 25-44 age group, big, mainstream media - Radio, TV and Print – much more connected with this cohort of the population compared to social media platforms

ALL AGED 25-44

I don't feel
connected at all
(1)

I feel completely
connected
(10)



Based on mean score excluding don't know/NA

Q.6 And on a scale from 1 to 10, where 1 = "I don't feel connected at all" and 10 = "I feel completely connected" how would you rate the following media and social media in terms of making a connection with you by providing information on Corona / Covid-19 that is relevant to you?

Base: All Respondents aged 25-44 350

**THANK
YOU**

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