Media Central
April Listener Survey – WAVE 2

In the field: 9th -15th April 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: 5,371
Format: Online survey across Today FM, OTB.com, Newstalk, 98FM, SPIN1038 & SPIN South West.

Wave 2 - Introduction: Consumer Sentiment and Habits since the outbreak of COVID-19

As the impact of Covid-19 continues to effect all aspects of our economy, last week we continued with the 2nd wave of our research and from your feedback we added some additional questions to try and further understand and make sense of where the market is and what changes are occurring.

There have been some notable changes and trends since Wave 1, firstly the time at home combined with the pressures on personal finance means we are seeing more consumers reviewing their current providers producing a growing mood to switch. We can also see a number of brands have performed better than others since the outbreak in terms of consumer sentiment towards their brands. This, alongside the fact that we are seeing over 70% of people are listening to the same or more live radio shows how important it is to keep communicating to consumers where you can as they are listening more than ever.

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

This wave of research received 5,000+ responses over the period of the 9th – 15th April and we hope you find this helpful and it can provide some insight for you during this difficult period. Lastly we asked participant's a simple question, "how they are feeling", and we are glad to report that many feel we may be turning a corner and "HOPE" was the biggest single feeling expressed.

Andy Macken
Head of Agency Sales

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

TRUST

Radio Listenership Update

Since the outbreak, all of our stations have seen **significant listenership growth**.**

Reach has grown by **32%**

People are listening **54%** longer

Generating a **45%** increase in listening

App users have grown by **24%** on Feb’20

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

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* Eurobarometer study 2019

** Based on all digital listening across Communicorp Media stations 13th -19th April vs Average Week in Feb ‘20 (During GE2020)

March
Listener Survey

Consumer Insights

Key Point Summary

Some brands and categories have performed well during the lockdown; others less so

A number of categories have seen a boost in sales, with home baking, home cooking and cleaning products all performing well.

The supermarkets have been seen as supportive, and brands perceived positively include Tesco and An Post. Meanwhile, AIB's changes to rates and charges has proved an error in terms of PR

Many are reviewing their providers and looking at their options

Many consumers are reviewing their finances and providers and considering switching – in broadband/Wi-Fi this is almost 1 in 5 customers, while the numbers considering switching their mobile plan have risen from 11% to 14% in the space of just a few weeks

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

Over 70% of people are listening the same or more to live radio – this cuts across demographics

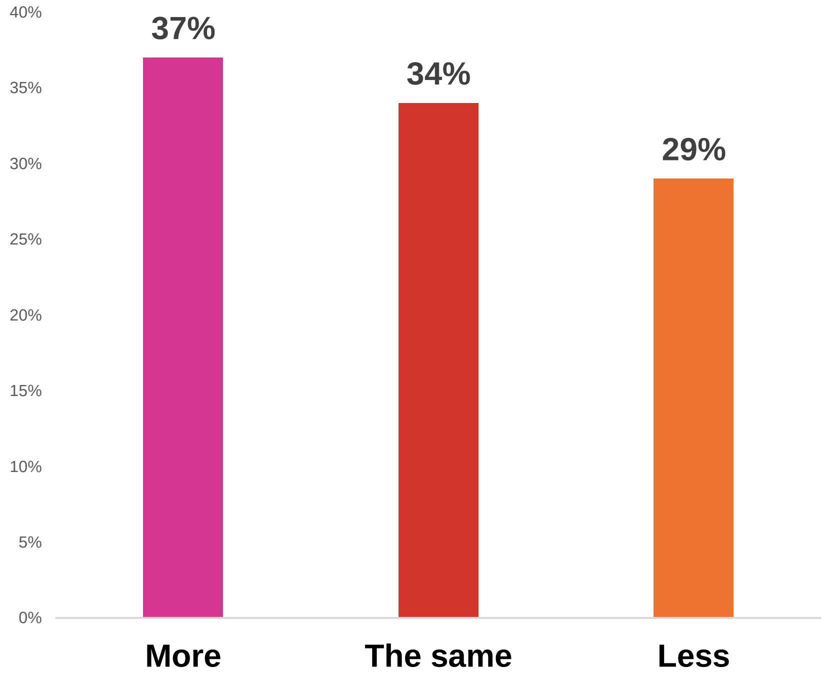
Many feel we are turning the corner, with hope the single biggest feeling expressed

People are still feeling a mix of positive and negative emotions, often at the same time. However, by far the number 1 sentiment is hope, and this is stronger again among all groups over 35

Are you listening to more or less live radio?

People are listening more than ever to radio

Over 7 in 10 are listening to as much or more live radio than ever during this period. The figures are more than 2 in 3 across every demographic group, so it is certainly a time when the nation is listening

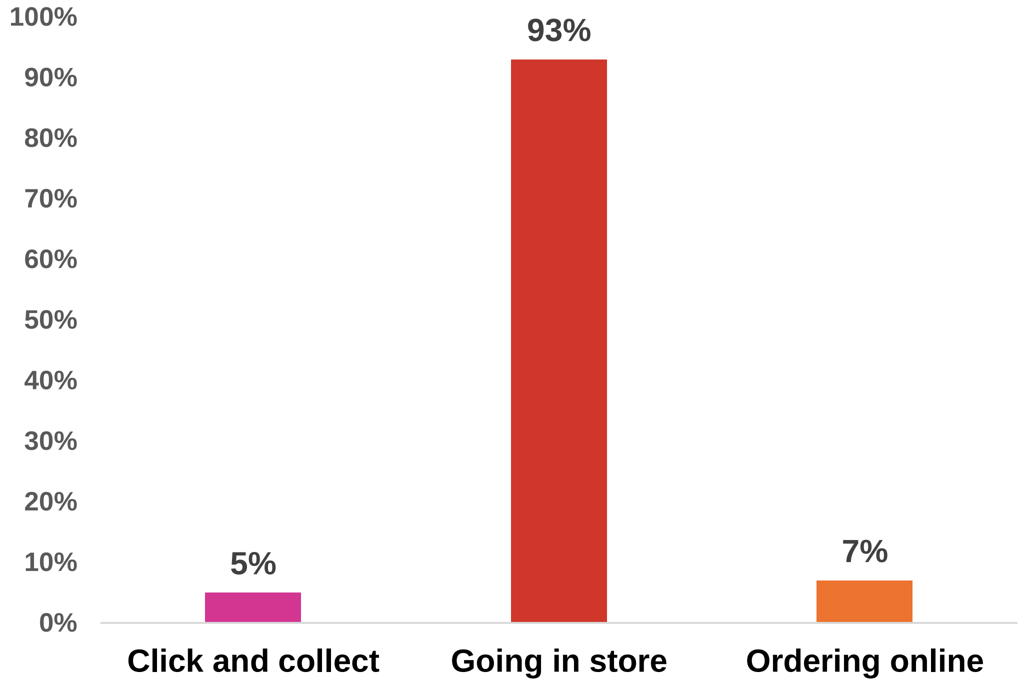


Retail - Grocery

How are you currently managing your food shop?

Most still going in-store

A majority report still going in store for their food shop, while among older people we are seeing many mix store visits with some online or click and collect

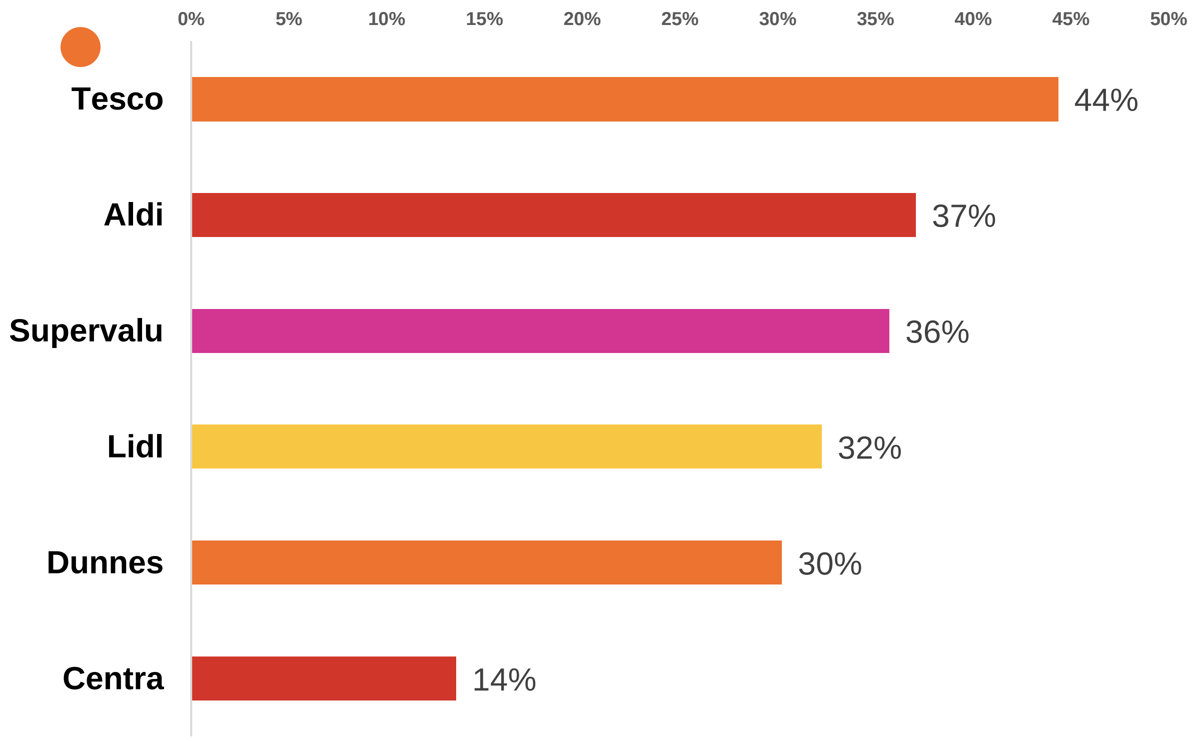


Retail - Grocery

Where are you shopping?

Tesco remains most popular at the moment

Many still using more than one retailer at the moment, with the main supermarkets performing well as people get larger shops

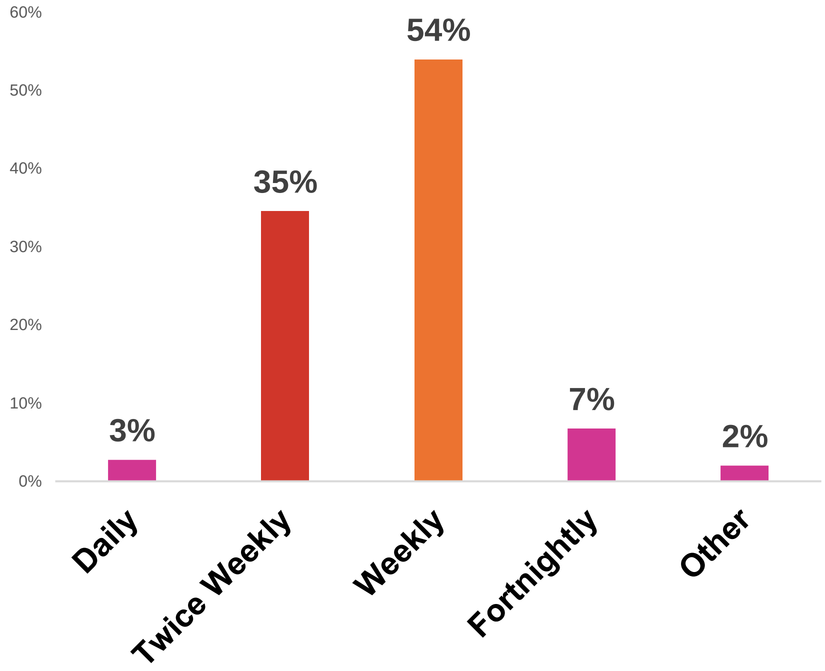


Retail - Grocery

How frequently are you doing your grocery shop?

The average number of shops per week is 1.5

While more people say they are shopping less at the moment, most are still in the range of 1-2 shops per week. This is consistent across the age groups



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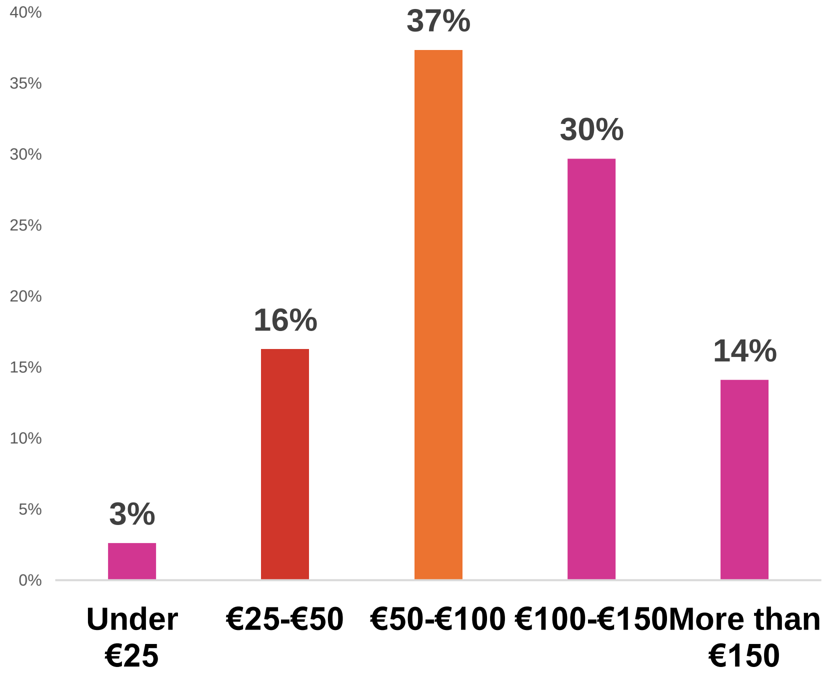
Retail - Grocery

What is your average weekly spend on grocery shopping?

Average weekly grocery spend is just under €100

The average weekly grocery spend is €99.87, which is 30% greater than average weekly main shop according to TGI. The biggest differences are by lifestage, with mid-older families spending most on average



% spending more than €150 per week

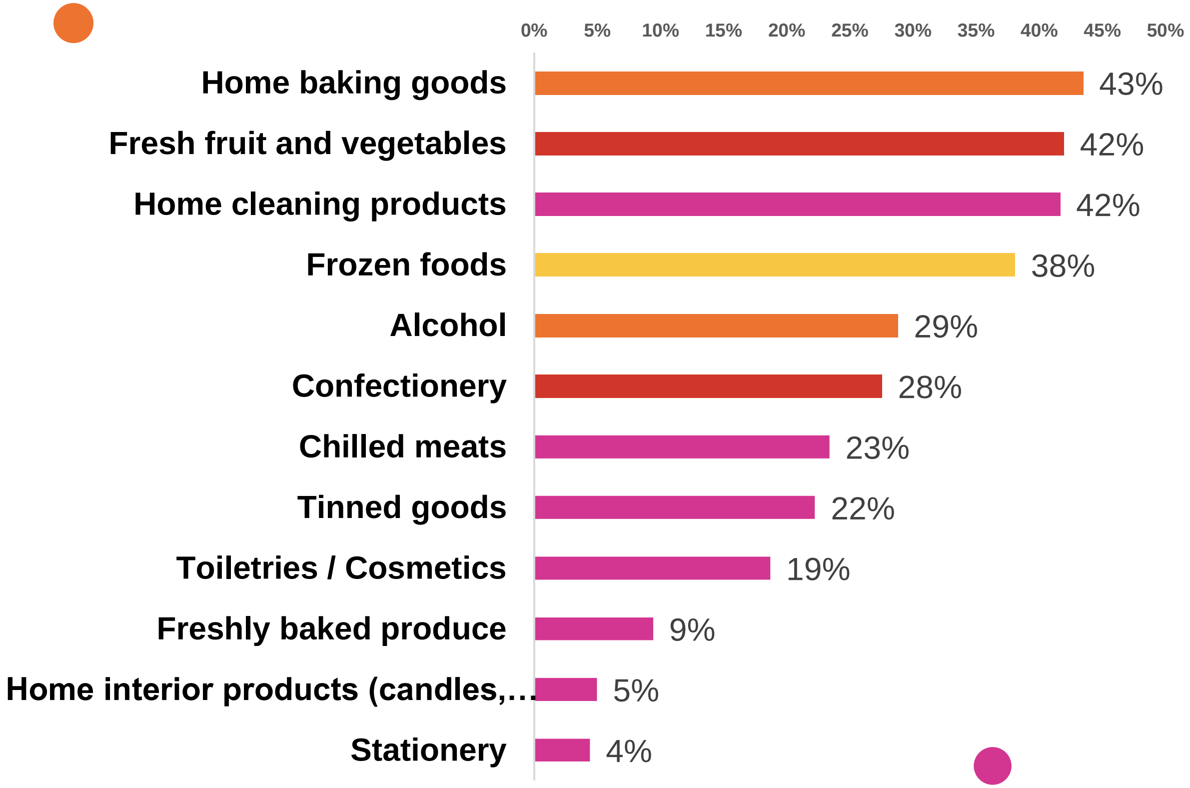
Total	18-24	25-34	35-44	45-54	55+
14%	11%	8%	22%	25%	17%

Retail - Grocery

What are you buying more of than prior to the crisis?

Large increases in sale of home baking and cooking products

Purchasing has increased across a range of categories, with people cooking, baking and cleaning more, as well as stocking up the freezer and drinking more alcohol at home



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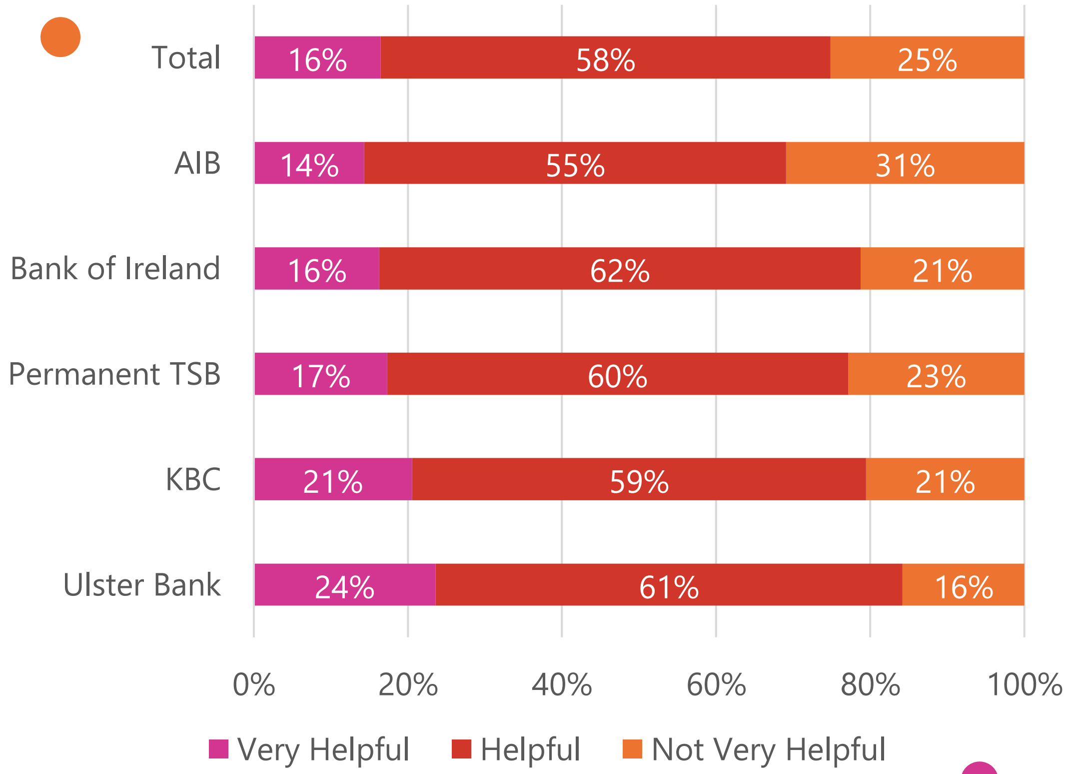
Financial Services

How helpful has your banking institution been during Covid-19?

Across banks, those 35-54 appear to be least happy with their banks performance

AIB customers most likely to say the bank has been unhelpful during Covid 19, with the rates and charges issue clearly impacting perceptions. Ulster Bank appear to have been the most helpful so far in the crisis.

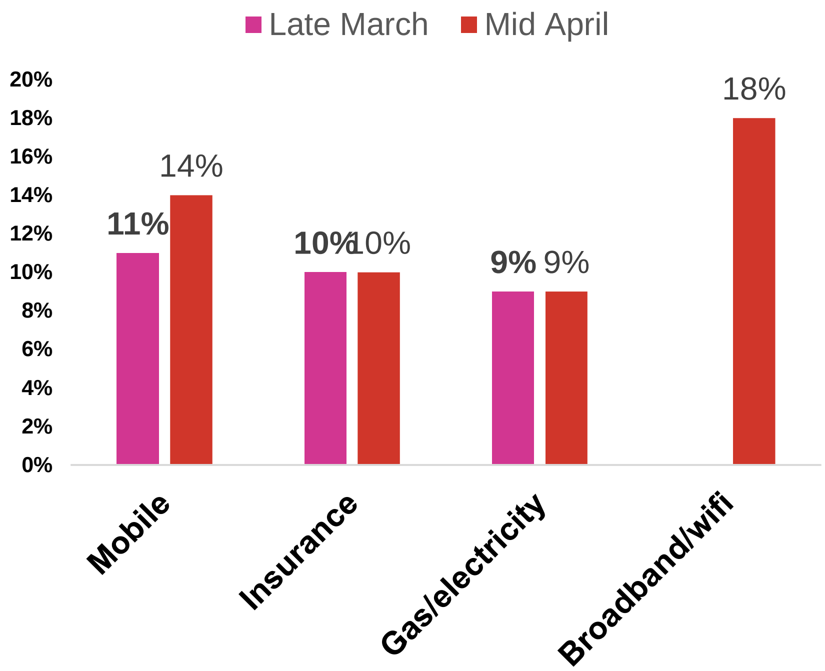


Switching Providers

Are you currently considering switching provider?

Increasing numbers of mobile customers considering switching

With more squeezed financially, the numbers of mobile customers looking to switch are rising, while almost 1 in 5 home broadband customers are at risk of churning



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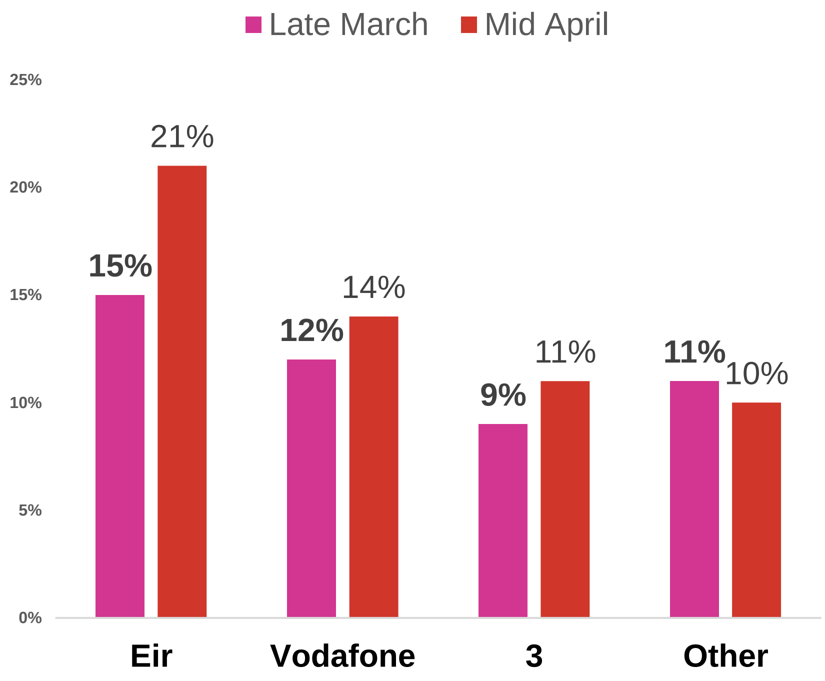
Mobile Providers

Likelihood to switch provider – mobile customers

Increasing likelihood to switch, across the market as customers look for value.

The numbers looking at switching are increasing for all major providers, with eir specifically at risk of churn.

Those aged 35-44 continue to be most likely to switch



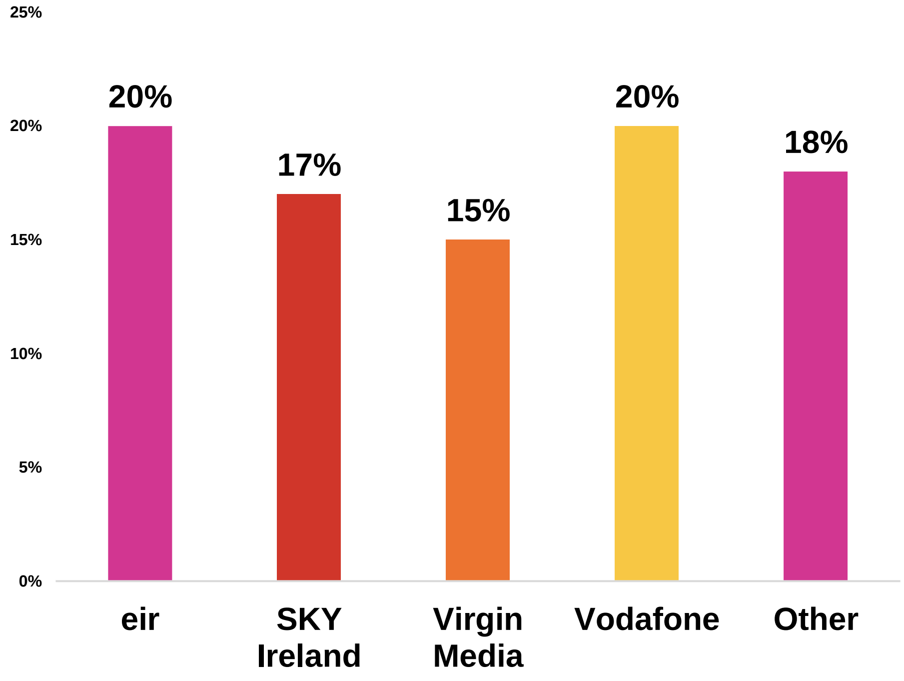
Total	18-24	25-34	35-44	45-54	55+
14%	14%	13%	16%	13%	12%

Broadband/Wi-Fi Providers

Likelihood to switch provider – broadband / Wi-Fi

Higher threat and opportunity in this category across providers

Similar to mobile, eir customers at high risk of switching. At a time when many are using this more than ever, people are willing to look around for the best service available



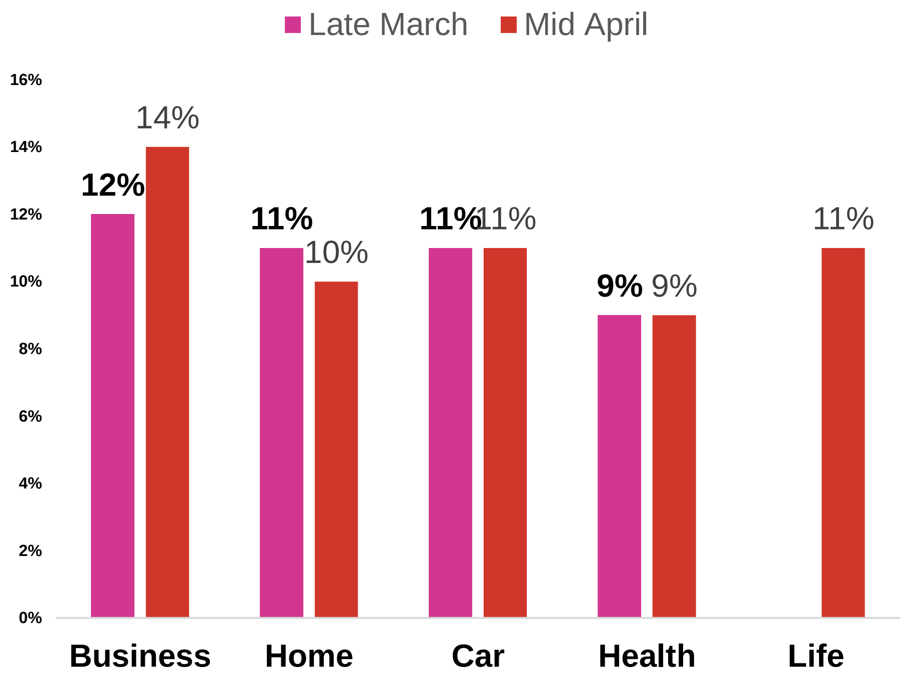
Total	18-24	25-34	35-44	45-54	55+
18%	18%	18%	19%	20%	15%

Insurance Providers

Likelihood to switch provider – insurance

Business owners most likely to be looking at switching options

Across most insurance types, about 1 in 10 are looking to switch, while this increases to 1 in 7 among those aged 35-44



Total	18-24	25-34	35-44	45-54	55+
10%	7%	10%	14%	14%	13%

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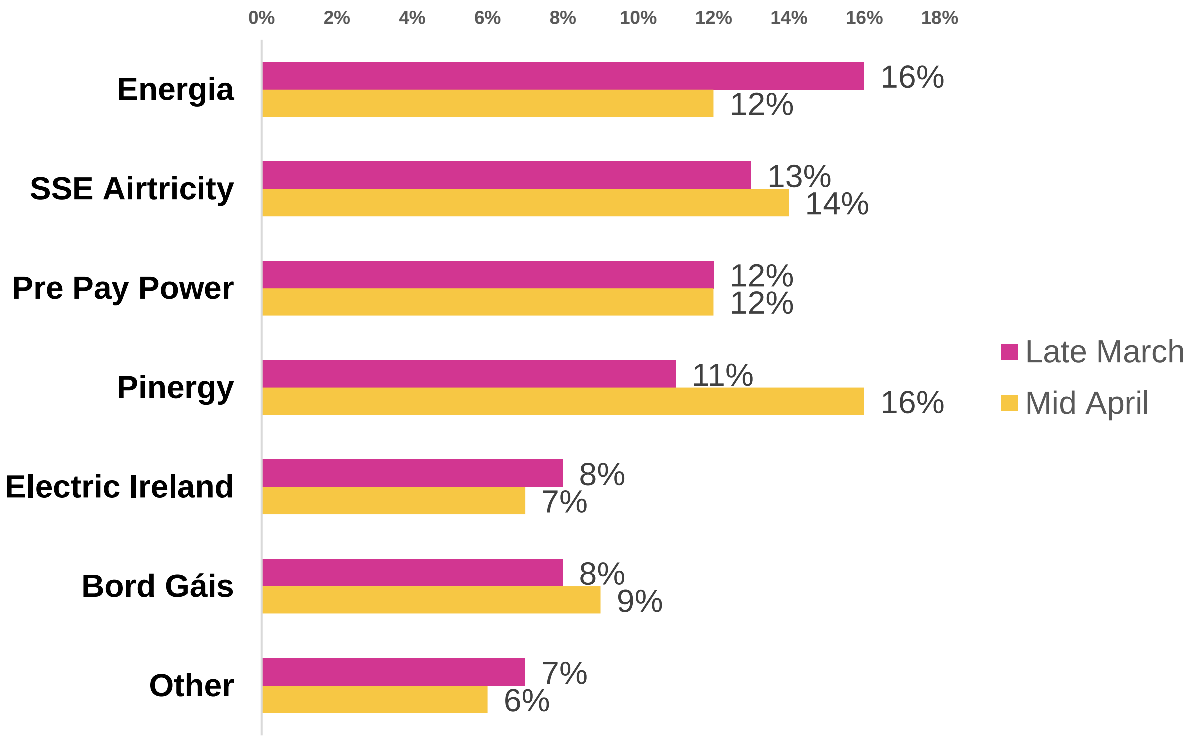
Utilities Providers

Likelihood to switch provider – gas/electricity

1 in 6 of those aged 35+ looking to switch provider

The providers most at risk of churn are SSE Airtricity and Pinergy, with customers of Bord Gáis and Electric Ireland less likely to make a move



Total	18-24	25-34	35-44	45-54	55+
9%	3%	9%	16%	16%	16%

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Brand Performance since the Outbreak

Which brands stand out in a positive light?

The supermarkets, particularly Tesco, and An Post among the winners in the public's eyes so far.

The supermarkets have garnered by far the most mentions, with Tesco a clear number 1, followed by Dunnes, Aldi and Lidl. The HSE 'brand' has also done well, along with An Post. The decision by O'Neill's to switch to making PPE has definitely brought them goodwill.

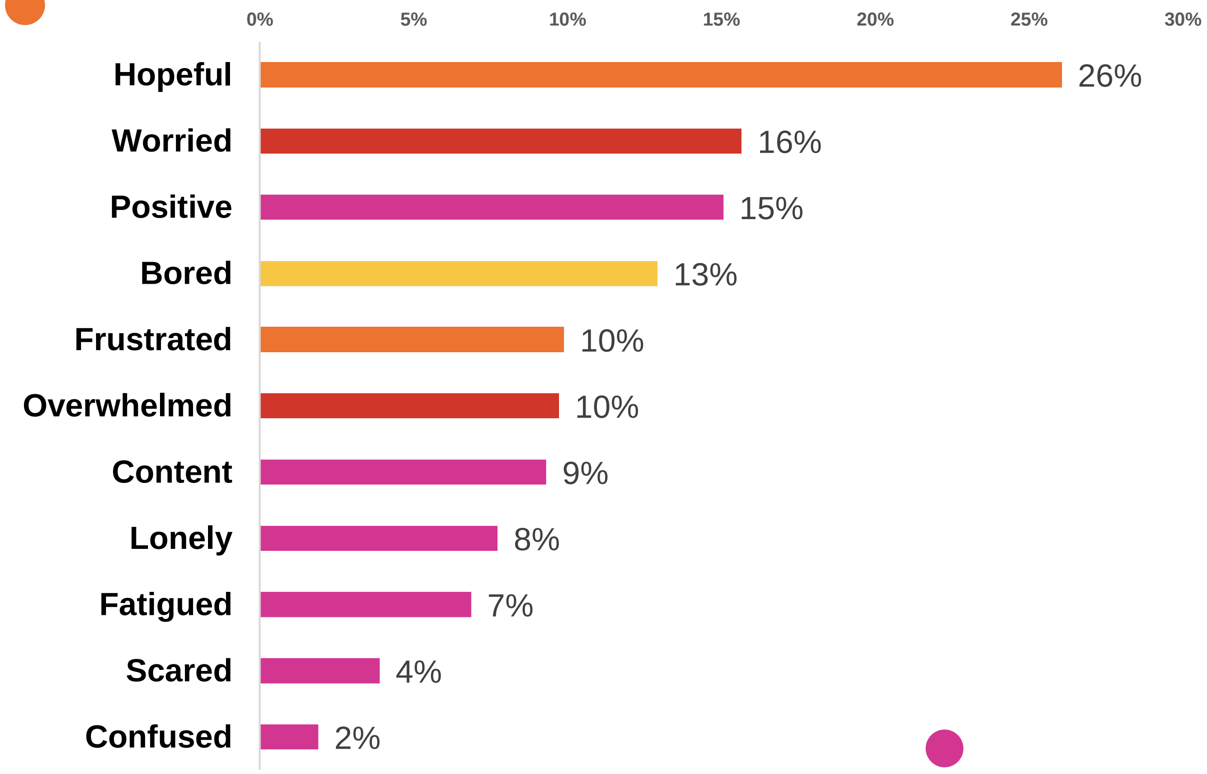
In addition, brands which have helped people through their daily lives have also been mentioned – these include Cadbury's, Brennan's, Dettol and Netflix

Overall sentiment

How would you describe your current mood?

Hope the single most common feeling

A mix of positive and negative emotions prevalent, with some feeling both at once. However, hope is the clear number 1 at this point, and this increases with age from about 35



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Thank you

For more information please contact your account manager

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