

## Looking forward to 2023

The changes we see affecting the year ahead



## Agenda

- 1. HOW THE INFLATION IS AFFECTING CONSUMERS
- 2. WHAT WILL AFFECT CONSUMERS THE MOST IN 2023?
- 3. HOW WILL THE YEAR CHANGE THE WAY CONSUMERS INTERACT WITH MEDIA?

### Overview of 2022







Many of the expert opinions in this year's database are pointing to inflation easing off as the year progresses\*. On the downside, few predict that inflation will drop back down to the 2% range that Fed policymakers' favour.



**GDP** 

Forecasters have been revising their economic projections downward in recent weeks.

The latest was World Bank, which now sees global growth declining to 1.7% in 2023, down from 3% just six months ago. Most of the predictions in our database see global economic growth in the range of 1.5% to 2%.



**SAVINGS** 

The large savings accumulated during the acute phase of the pandemic will cushion the impact of higher prices. Irish households continue to engage in considerable saving activity, partly for precautionary reasons.

Generally, the financial situation of Irish households remains solid, with the unemployment rate at historic lows and wages rising, albeit more slowly than inflation.



**EXPORTS** 

Exports, notably of multinational corporations producing medical devices, pharmaceuticals and those providing information and communication services, remain the driving force behind Ireland's very strong economic growth. These sectors are generally expected to remain resilient and supply difficulties have reportedly diminished.



### Consumer Confidence Improves but Concerns Linger

Consumer confidence remains at a very low level, with 3 in 4 (74%) believing Ireland will be worse off in the coming year, and just 1 in 10 feeling Ireland will be better off.

A two-tier economy is very evident, with the improvement in confidence coming solely from Leinster (including Dublin), and consumer confidence being particularly low in Connaught/Ulster.

Income expectations for the year ahead has also improved, though almost half (47%) expect a decline in disposable income in the year ahead.





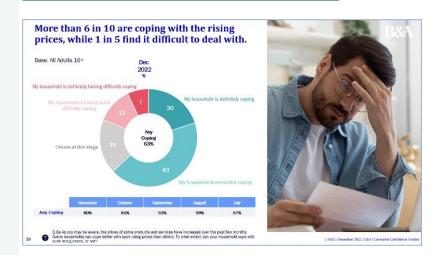
# Financial confidence is starting to dip while 6 in 10 are coping with rising prices

Pent-up savings off the back of the pandemic or a favourable job market could be contributing to feelings of greater financial comfort.

It's important to remember that not everyone will feel the brunt in the same way, and while many consumers will no doubt make cutbacks and re-prioritize spending, many others – particularly higher earners – will continue to spend, and spend big.

Obviously, financial security during times like these is incredibly uncertain, and likely to fluctuate further. But, for now, many aren't battening down the spending hatches just yet.

Spend expectations for the year ahead has also improved, though 55% expect to spend less.





## Growing Bill Anxiety & the Lipstick Effect

Bill anxiety is growing, with 58% of respondents saying, rising bills are having a negative impact on their wellbeing. With less discretionary income, the majority (63%) are changing how they spend money.

To a lesser degree consumers are spending less money on gifts, giving less to charity, and cancelling subscriptions, apps and streaming services.

Sales of smaller luxury beauty items have risen, as consumers seek a way to elevate their mood. As inflation continues to put stress on consumers, they will adopt various tactics to pair back on less essential expenditures.

Items that offer escape and indulgence will still be sought out as a way to boost mood.

Enjoying mood boosting food and drink at home is affordable and its rise is what Mintel calls the indulgence index.

Spirits, gained a boost from the post-pandemic return of travel for leisure and gatherings for special occasions.

Consumers, who sought out comfort foods during the pandemic, are again finding pleasure and escapism by partaking in affordable treats.



## While we see financial hindering spending, consumers will still look to treat themselves



**KEY TAKEAWAYS** 



WE EXPECT FINANCIAL UNCERTAINTY IN 2023



IT'S GOING TO FURTHER
AFFECT CONSUMER
CONFIDENCE NEGATIVELY



BILL ANXIETY IS ALREADY HAVING AN IMPACT ON CONSUMERS' MENTAL WELL-BEING



CONSUMERS WILL BE MORE CONSCIOUS ON SPENDING BUT THEY WILL STILL BE INTERESTED IN TREATING THEMSELVES

### What will affect consumers the most in 2023?

SUSTAINABLE LIVING IS THE CONTINUED TOPIC FOR 2023

Whether it's brands around consumers pushing for more sustainable methods of living or a naturally decreased consumption due to inflation, 2023 will see an increasing amount of sustainability efforts.

2

2023'S MOTTO WILL BE TO "SPEND LESS".

We'll see this from different corners of their lives such as:

- A decrease in their monetary spending
- Using automation to spend less time on things
- Or even controlling the time we spend online

3

**CRAVING SOCIAL CHANGE** 

Consumers want to see meaningful change in society, and they believe brands have the power to make a real difference. 4

GAMIFY THE CONSUMER
JOURNEY

With more stress looming around us , financial and otherwise, entertainment is expected to help give consumers some escape from reality now more than ever.

## Technology future proofing consumers

IF THERE'S ONE THING EVERYONE AT CES CAN AGREE ON, IT'S THAT SUSTAINABILITY IS A PRIORITY. VIRTUALLY EVERY COMPANY TALKED ABOUT HOW ITS PRODUCTS WOULD BE MORE SUSTAINABLE, FROM SAMSUNG'S PARTNERSHIP WITH PATAGONIA TO REDUCE MICROPLASTICS IN THE WATER SUPPLY TO ASUS' BOAST THAT IT HAS USED 1,500 TONS OF RECYCLED PLASTIC IN ITS PRODUCTS SINCE 2017.



### The race to own the car's future

- Perennial South Korean rivals Samsung and LG each pitched their own smart car platforms.
- BMW used its keynote to show off the i Vision Dee (or "digital emotional experience"). The car talks like Knight Rider's KITT (which was also in attendance), changes colour using E Ink and features an AR display that wraps around the windshield.
- Volantis showed off its futuristic Ram Revolution Concept vehicle, complete with AR display, massive moonroof and jumbo 28-inch touchscreen.



TVs said buh-bye to gimmicks

- LG probably made the biggest splash at CES with its 97-inch OLED TV capable of a high 4K resolution picture and an ultrasmooth 120Hz presentation of games and movies. Entirely wireless
- Samsung Premiere small apartment projector

Home entertainment devices that are practical and directly address the needs of most consumers is a trend we can get behind.



### Contortionist phone screens are coming

- Samsung managed to create a little buzz with a foldable concept device that flexes in more than one way.
- The Flex Hybrid sheds light on where our phones can go, and just how crazy these foldables can actually
- That other once ubiquitous mobile buzzword, 5G, on the other hand. barely made a blip at the show. We're a few years into the technology, and while it's faster (in some areas), it hasn't really shown itself to be the gamechanger it was hyped up to be.



### A simpler (and smarter) smart home setup

Matter, an open-source, universal smart home protocol backed by Amazon, Apple, Google, Samsung and countless others is finally live. The pitch is promising: a single, Wi-Fibased standard that bundles together compatibility with Alexa, Google Assistant, Siri and SmartThings, among others.



### Get ready to have your health analysed at home

- Withings and Vivoo came to the show with sensors that attach to your toilet bowl to analyse your urine. It'll keep tabs on nutrient levels, hormones and more.
- Nuralogix announced to use its AI to measure blood pressure, heart rate and more by analysing your face from a selfie.
- · Al also makes it possible for Valencell's new fingertip blood pressure sensor to give you accurate readings without traditional cuff.
- Jabra Enhance Plus earbuds that double as a hearing aid.

## We'll see strong changes in shopping behaviour

More people are shopping for essentials, meat purchases are being cut except for chicken, and 54% consumers say shopping lists are more important in recent months.

The number buying treats for the family are down 19 percentage points, and a majority of people say they are going to restaurants and cafés less.

Just under half of Irish respondents say they buy less takeaway for consumption at home.

More than half of Irish shoppers now go to multiple outlets to shop and many are switching to own brand labels for the best value.

More consumers are preparing food from scratch at home, and there is a new emphasis on food with longer shelf life.



## The inflation has led to the Budgeteer shopper

THESE ARE SHOPPER WHO FOCUS ON BUDGETING WHEN THEY SHOP - WHEN TO SPEND VERSUS WHEN TO SAVE—THAT'S THE DILEMMA.

Inflation and high prices undermine purchasing power. Now, consumers are methodical with their money.

Financial stability is under threat. People must decide between paying more for everyday essentials, trading down to lower-cost alternatives or forgoing items entirely.

Businesses need to implement or develop solutions that help Budgeteers save while also evaluating overhead expenses.

#### Lidl Ireland

Lidl Ireland released special discounts through the usage of their app once you register the coupons.



### **IKEA**

IKEA expanded the benefits of its Family Loyalty programme to include a 5% savings on eligible in-store purchases and exclusive discounts on certain delivery options.



### Cut backs aren't all bad

SAVE YOUR POCKET, SAVE THE PLANET SAFETY

The cost-effective option has become about limiting and reducing. Decreased consumption is increasing sustainability by proxy.

Now, saving takes precedence, but the cost of living is creating a new sustainable behaviour. Goods, energy and housing prices are causing people to cut back. Market dynamics spurred green activities like repairing, second-hand shopping and renting.

Economic necessity ushered in a new era of sustainable behaviour rather than purchase decisions. Consumers will still be reluctant to pay more for sustainable products this year.

34% of consumers
were willing to buy
second hand or
previously owned items
in 2022

45% of professionals said investing in sustainability initiatives is a strategic priority for their company in the next five years

41% of professionals said lack of consumer willingness to pay more for sustainable products is the most significant challenge

#### Nike

Niek debuted a robot called the Bot Imitated Longevity Lab (BILL) designed to clean and repair trainers



#### We Do Solar

Designs DIY modular solar panels for apartment balconies which claim to reduce electricity bills up to 25% as well as CO2 emissions.



#### Sainsfreeze

Grocery retailer, Sainsbury's opened up a pop-up walk-in freezer, that showed consumers which foods can be frozen to reduce waste, extend freshness and save money.



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## The urge to splurge will still remain

NO TIME LIKE THE PRESENT TO SPEND

Consumers are giving themselves permission to live a little. They're not abandoning financial responsibility, but they are taking a short-term buying approach with discretionary items. Sparking joy can be a purchase motivator.

Here and Now is about living in the moment. Consumers don't know what tomorrow brings and aren't wasting anymore time. Money isn't the only valuable asset. Time, health and bliss are equally important. Price tags are still relevant, but the emotional benefit also justifies impulse or big-ticket purchase decisions.

50 % of consumers enjoyed life and didn't worry about planning for the future in 2022. 56 % of retail professionals said their company doesn't offer buy now, pay later options

Businesses should create campaigns that target special occasions.

Alternative payment methods can also help split costs over time while catering to immediate consumption.

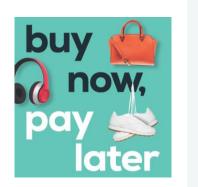
## Starbucks and Delta Air Lines

They linked their rewards programmes to deliver additional benefits like earning miles on coffee purchases.



### Buy now, pay later

Innovative instalment models like buy now, pay later are becoming standard. Fintech companies overhauled traditional lending options, but banks and payment networks are getting in on it too.



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## Spending is also a focus on how we behave online

BEING MORE MINDFUL OF HOW WE SPEND TIME ONLINE - CONTROL THE SCROLL

Internet activities are transitioning from mindless to mindful. But consumers aren't unplugging completely. They want to consolidate

57% of consumers deleted apps on their smartphones in 2022

and centralise their platform usage to optimise their time.

### Oneflix

Oneflix is a streaming aggregator guide that allows users to browse titles across different platforms like Netflix, Disney+ within a single app.



People are tethered to their devices. But screen time is more selective. Consumers want content and products filtered to their interests. Brands shouldn't be a distraction.

### Skin Rocks

They simplify skin care regimens. The app offers a guided list of recommendations of things you need or don't need.



## Shoppers gravitate towards quick, convenient options to save time and money

UM

**CONSUMERS WANT FAST AND FRICTIONLESS** 

Automation replaces certain manual tasks to meet these demands. Smart appliances detect when supplies are low and replenish goods.

But tech is only part of the equation. Consumers still crave the personal touch. 58% of consumers were comfortable talking to a human to address customer service questions compared to only 19% talking to an automated bot on company's website.

Consumers want to interact with humans and machines but for different reasons and at specific points in the path to purchase.

Humans and machines need to be in sync to deliver meaningful solutions. Businesses should assess all touchpoints in the customer lifecycle. Then, find ones that can be fully automated versus those that should remain interpersonal to build stronger relationships with your audience.

#### Telenet

Telenet partnered with Antwerp University Hospital to virtually transport young patients to their homes/ classrooms.
Robots are placed in these physical locations, and patients wear VRiendje VR goggles to control the robot's movements and interact in the environment.



#### ClockWork

They created the first manicure robot that paints nails within 10 minutes.



## We need entertainment now more than ever

#### DIGITAL REALITY TO ESCAPE REALITY

People want an outlet for the stress in their everyday lives. Online communities serve as a platform to socialise and connect with others who share similar interests.

Gamers are investing more time and money to enrich their experiences. Spend on virtual products and add-ons continues to grow, and their perception of ownership is transforming. Physical and digital assets have equal importance to Game On consumers

### Maybelline

They partnered with game developer Zynga to launch in-game playable ads.



#### DHL

Launched a campaign to target E-sports community and promote recruitment.

Applicants have a chance to be featured in an episode of DHL Dota Adventures.



30% of consumers owned a gaming console in 2022 37% of consumers participated in online video gaming at least weekly in 2022 23% of global sales growth of in-game purchases from 2021 to 2024

#### MOD4

MOD4 is a mobile game where consumers create their own avatar outfits to win challenges and earn rewards points to redeem or shop for real fashion items.



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## Travelling continues against budget cuts but with more purpose

IN 2023, TRAVELLERS WILL BE GOING ONE STEP FURTHER AS WE LOOK TO DEEPEN THESE EXPERIENCES BY HAVING A LASTING POSITIVE IMPACT ON THE PLACES AND PEOPLE WE VISIT. WE'LL IMMERSE OURSELVES IN NEW, MIND-BENDING WELLNESS PRACTICES WITH BENEFITS THAT CONTINUE FAR BEYOND CHECKOUT, AND MAKE MEANINGFUL CHANGES TO THE WAY WE TRAVEL WITH PROTECTING OUR PLANET TOP OF MIND.



Transformation Retreat

2023 will be the year we travel for personal betterment.



Modular Hotels

Flat pack hotels – sustainability using 3D-printing technology, which can manufacture modular hotel parts, flat pack, ship, assemble on-site, and open for guests in under a year.



Set-jetting

Next year, many travellers will take their favourite TV shows on tour, using stunning and interesting filming locations as a springboard for an exciting new holiday destination.



A new kind of allinclusive

There's been snobbery around all-inclusive retreats for decades

But smart brands are now putting a roots-y spin on the concept



Swankier airport lounges

Airlines are trying harder than ever to distinguish their top-tier lounges as rarefied spaces.

### Female is NOW

#### **CONSUMERS ARE CRAVING SOCIAL CHANGE**

Consumers demand female equality. The #MeToo movement was a catalyst for social change.

People refuse to remain silent on gender inequality issues. True transformation will be built around fair representation, equity and inclusivity. Women support brands that align with their values.

### Victoria's Secret

They dropped its angels and launched the VS Collective, joining hands with influential female leaders in a massive rebrand to connect with the everyday woman.



59% of women
believed their choices
and actions can make
a difference to the
world

48% of women defined beauty as being comfortable in their own skin

46% of women preferred to take charge and lead others

### Phenology

They're a women's health initiative designed to improve menopause. The brand offers products and services like athome testing and tracking, on-demand coaching and supplement line to alleviate symptoms.



### What does this mean?





### Sustainable living is the continued topic for 2023

Whether it's brands around consumers pushing for more sustainable methods of living or a naturally decreased consumption due to inflation, 2023 will see an increasing amount of sustainability efforts.



Consumption patterns are less about acquisition and more about reduction, which positively impacts the planet. Business models should strive to unify cost savings with green commerce.

2

### 2023's motto will be to "spend less".

We'll see this from different corners of their lives such as:

- A decrease in their monetary spending
- Using automation to spend less time on things
- Or even controlling the time we spend online



Businesses need to implement or develop solutions that help consumers benefit them may that be financially, create more convenience in their lives and filter their content to their interests. 3

### Craving social change

Consumers want to see meaningful change in society, and they believe brands have the power to make a real difference.



### Gamify the consumer journey

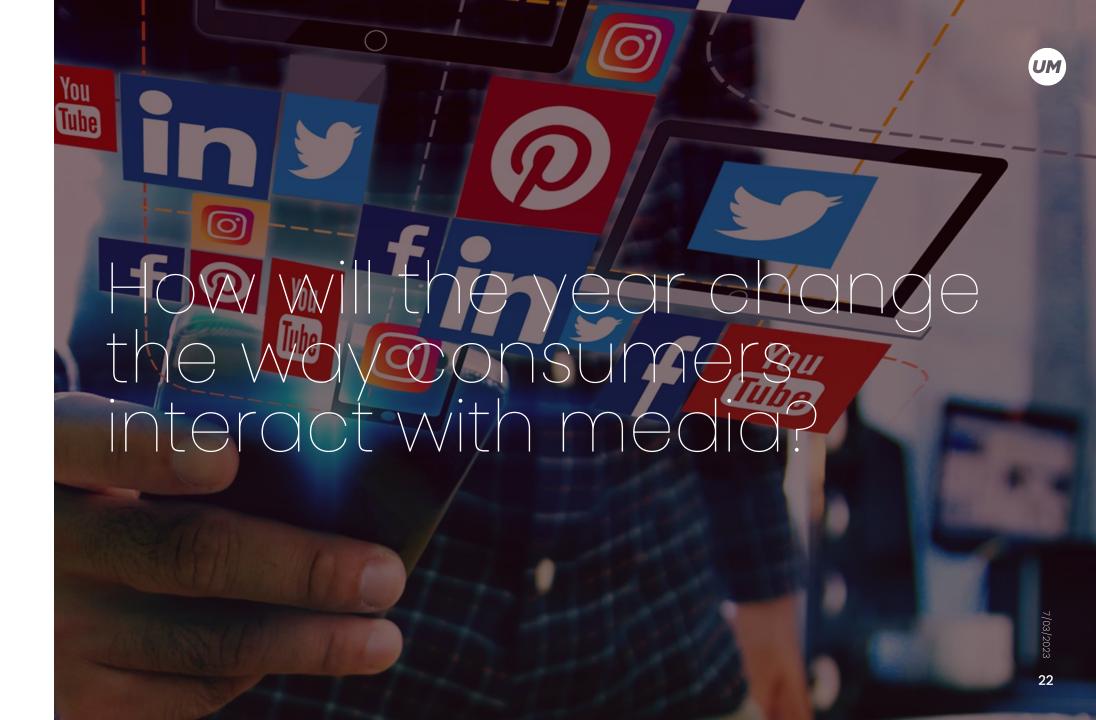
With more stress looming around us, financial and otherwise, entertainment is expected to help give consumers some escape from reality now more than ever.



It's not enough for brands to communicate functional messaging of their offerings.
Consumers will want to see them standing for something meaningful that is relatable and something that they can support together.



Companies are getting their Game On. Sponsorships, advertisements, in-game purchases and product innovations are the primary revenue drivers thus far. And AR/VR tech investments show no sign of stopping. Gaming experiences are only getting more sophisticated.





## Media affecting 2023 in a nutshell

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4

As a result of increased smart TV penetration, offerings such as shoppable ads on TV and livestream ecommerce will also become more commonplace, providing e-commerce brands with the opportunity to take consumers from awareness right through to purchase, all within a single ad format.

Online and on demand channel consumption has been increasing YOY and we expect this trend to continue into 2023 Audio is increasing in strength through to physical and mental availability, the increase of digital audio usage and smart speakers. The cookieless world is looming over our heads and even consumers are now more aware of the information they share.



## In 2023, we forecast similar levels to 2022 across some channels with TV inflation seeing the biggest decrease

CPM Inflation Forecast	TV	Mags	Print	Radio	ООН	Online Display	Online Video	Cinema	All Media Avg	Offline Media Avg	Digital Media Avg
2021	41%	-1%	-1%	6%	2%	8%	8%	0%	16%	21%	8%
2022	19%	-1%	-1%	4%	2%	2%	5%	5%	5%	6%	4%
2023	12%	-1%	-1%	2%	2%	1%	3%	2%	3%	2.5%	2%

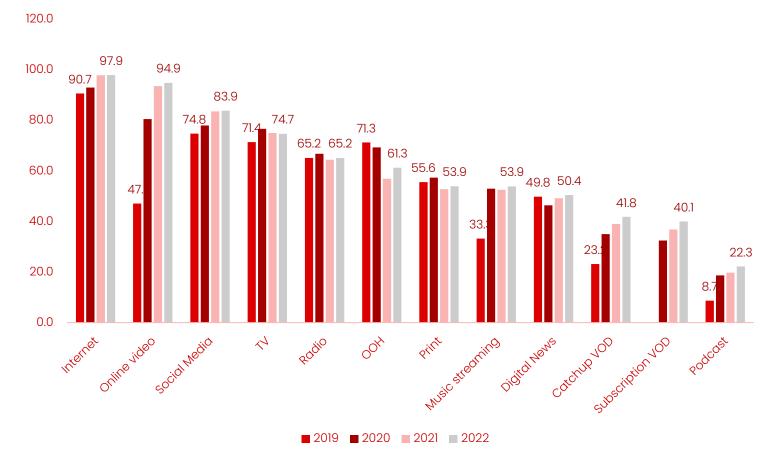
Source: Magna: IPG: Market Intel



Online and on demand channel consumption has been increasing YOY and we expect this trend to continue into 2023.

While traditional media has remained stable, we're seeing major increases in general internet usage, online video, podcasts and VOD consumption.

### Change in consumption for All Adults (%)



Source: Kantar

## How technology is shaping the future for TV-based advertising

During the pandemic, many homes explored the full functionality of connected screens. Consequently, we're now reaching the tipping point in smart TV penetration and usage, with consumers increasingly using their TV to stream content directly, connecting via apps and inbuilt IP services.

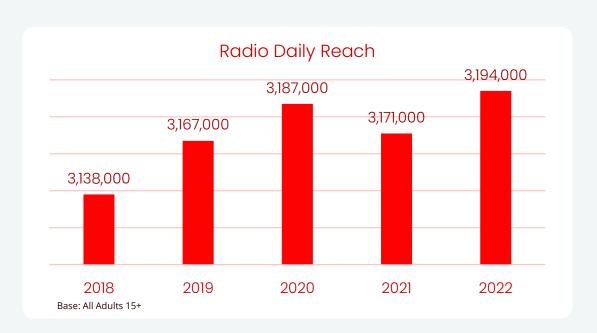
The evolution and adoption of technology within the TV ecosystem has opened up new and viable avenues for marketers and advertisers to reach audiences. One particular area is product placement through IP delivery.

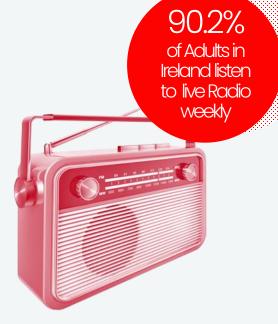
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## Radio reach persists in a crowded audio space









40%

LISTEN TO MUSIC

STREAMING









35% LISTEN TO YOUTUBE MUSIC 18% LISTEN TO OWN MUSIC 6% LISTEN TO PLAY BACK RADIO 23% LISTEN TO PODCASTS

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## The innate power of radio is becoming more important to people

### 3D Audio

Immersive listening ushers in the next generation of audio experiences

### Sonic Luxification

Luxury brands are investing in audio hardware, luxifying the listening experience

### Audio Healing

Wellness seekers
turning to audio
platforms and sound
technology

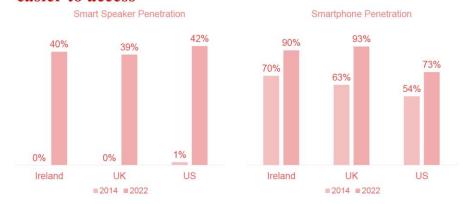


## Audio listening and its role in people's lives continues to grow

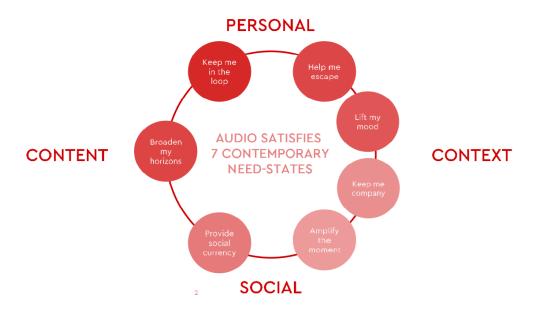
Physical Availability of audio

Mental availability of audio

### Increased penetration of connected devices makes audio easier to access



Source: Ipsos MRBI Media Platform Report Oct 14-Sep 15/Us Emarketer/UK Ofcom Technology Tracker



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## Digital audio Landscape Overview



### Scale and reach



In 2022, 6 in 8 adults or 2.78
million people
are listening to digital audio in
an average week

Way of Life



18-44 year olds & those working FT remain heavy users of digital audio

Time



On average people are consuming 19.3 hours every week

### Consumption



3 in 10 expect to increase their consumption with digital audio & podcasts in the coming 12 months

Listening behaviour



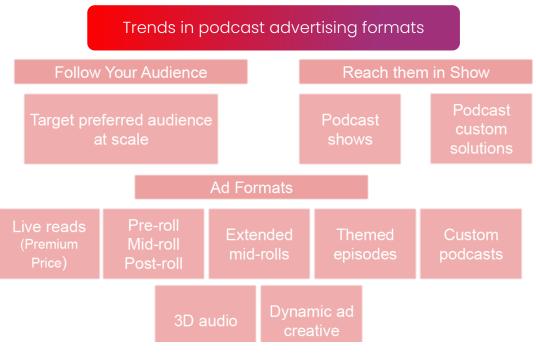


While Smartphone continues to dominate as the most used device, compared to 2021, connected car & smart speakers overtake desktop/laptop



## Podcasts are of increased interest to radio broadcasters and advertisers but measurement and control are challenges





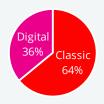
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## OOH revived – Mobility is back on track

#### OOH AND MOBILITY NEWS

### 2022 OOH Spend









### **2022 HIGHLIGHTS**

- Bounce back year for OOH following covid restrictions approx. +25% v 2021
- Retail dominant –supermarkets
- Increase in zero-alc beers +31%
- Banks up 11%, competition for KBC/UB customers
- Return of specials, experiential, innovation
- · Diageo still #1 advertiser

### **AVIATION**

More than 2.5 million passengers used Dublin, Cork, Knock, and Shannon airports in December 2022, 97% of the number of passengers handled in December 2019.

The number of passengers in Dublin airport in December 2022 was almost twice that of December 2021.

## PUBLIC TRANSPORT JOURNEYS AT 2019 LEVELS

Data from Nov '22 shows passenger numbers across bus, rail and Luas have more or less returned to or surpassed 2019 pre-Covid levels.

## DUBLIN IS WORLD'S 12TH MOST CONGESTED CITY

Out of 1000+ cities across 50 countries worldwide Dublin ranks as the 12th most congested city worldwide and 4th most in the EU according to INRIX. The average driver lost 114 hours because of traffic – up 28 per cent from 2021.

3/2023



## OOH is becoming smarter

**2023 KEY OOH TRENDS** 

Deeper understanding of mobility and consumer movement will help drive search that will lead to action as OOH develops and instigates this response in the consumer

- 1. In Real Life to URL OOH bridges our public and private worlds. By facilitating IRL to URL, OOH extends reach beyond the streets.
- 2. Value of OOH search Increase in search on the go and searches that take place in OOH locations are more diverse and valuable to brands than those made at home, as audiences are more primed to receive the message.
- 3. 5G Rollout / smartphone penetration 5G rollout and smartphone penetration makes delivery of information on the go easier than ever.
- 4. Out of Home is a one to many medium, a community canvas, continuing to deliver for advertisers through the use of iconic sites enabling big brand messaging at scale.
- 5. 2022 saw brands up their game in terms of creativity on OOH and trying to stand out we predict we'll see much more of this in 2023 and consumers will respond to the most creative and best executed campaigns.
- 6. 74% of people agreed that customized posters are more noticeable, 68% said they made a brand look more innovative and creative and 66% agreed they were more memorable.



## Data-based targeting in a cookieless world

WITH THE DEPRECATION OF THIRD-PARTY COOKIES CREEPING EVER CLOSER, WE EXPECT TO SEE MARKETERS EXPERIMENTING WITH PROXY-BASED TARGETING SYSTEMS AND CONTEXTUAL ADVERTISING.

Meanwhile, consumer attitudes towards cookies are mixed. According to Kantar TGI data, 51% of adults claim to regularly delete cookies from their devices.

Younger adults are more receptive to exchanging personal information for relevant free content, while those who regularly delete cookies tend to be older

For marketers, targeting within closed ecosystems – in which consented first-party data is available – will still be possible, but wider cross-platform targeting has hit the barrier of consumer privacy.

There will be incremental improvement in the coming years, but the hypertargeted ecosystem the internet once promised looks increasingly unviable and initial assumptions about the granularity of targeting outside closed ecosystems may have to be reappraised.



### What does this mean?



1

As a result of increased smart TV penetration, offerings such as shoppable ads on TV and livestream e-commerce will also become more commonplace, providing e-commerce brands with the opportunity to take consumers from awareness right through to purchase, all within a single ad format.



The evolution and adoption of technology within the TV ecosystem has opened up new and viable avenues for marketers and advertisers to reach audiences.

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Online and on demand channel consumption has been increasing YOY and we expect this trend to continue into 2023.



Audio is increasing in strength through to physical and mental availability, the increase of digital audio usage and smart speakers.



The cookieless world is looming over our heads and even consumers are now more aware of the information they share.



Businesses will need to be smarter with their strategies an while traditional, offline channels are still crucial, the increase of online channels will need to be a stronger consideration of the overall plans.



Radio is still a strong medium and we're expecting further increases in listenership due to consumers' use of digital audio with the rise of smart speakers, podcasts and mobile users. Businesses will need to consider audio in its entirety rather than just the traditional FM radio.



With the deprecation of third-party cookies creeping ever closer, we expect to see marketers experimenting with proxy-based targeting systems and contextual advertising.



## THANK YOU



## Appendix REFERENCES AND LINKS

Magna: IPG: Market Intel

JNLR 2022-2 (Jun21-Jun22 – 12 mth data) Base: All Adults 15+

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PML 2023

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