

COVID-19 MEDIA CONSUMPTION

1 October – 8 November



Executive Summary

Level 5 restrictions have had an impact on media consumption.

TV and VOD consumption are up year-on-year, reversing declines seen over the summer months.

Latest radio listenership figures give the first insight into listening patterns in 2020.

Overall there has been a migration to national and news channels as audiences seek information and comment.

COVID-19 conversation is also dominating social and search behaviours online.

Live TV viewership for all adults has increased by 6% year-on-year since Level 5 restrictions were introduced. For adults 15-34, viewership has increased by 9% year-on-year.

Sport and News dominated the Top 10 programming in recent weeks, with the France vs. Ireland rugby match achieving the highest viewership levels since lockdown.

VOD streaming levels increased again, up 30% compared to previous weeks. 'All 4' reported a record month in October, up 64% year-on-year, due to the popularity of The Great British Bake Off. The return of sport (rugby in particular) significantly increased live streaming volumes on Virgin Media Player.

While falling short of analyst estimates, **Netflix added an additional 2.2m global subscribers** in Q3, although this is lower than the record growth in Q1 and Q2 2020.

Taoiseach Micheál Martin said that media is crucial to Ireland's democracy at the inaugural meeting of The Future of Media Commission, which will advise the Government on how the future of news outlets can be assured.

Spike in social mentions of "Level 5 restrictions" on 5 October reached 15k total mentions in 24 hours.

Sporting fixtures, Level 5 restrictions and the US election dominated searches on Google in October and early November.

Earlier than usual Christmas shopping searches are a key trend with retailers; local suppliers have also noticed a surge in searches.

Latest figures from the JNLR show that time spent listening to radio has increased to 250 mins on an average weekday, up 5% on 2019, with overall listenership remaining steady at 81% of all adults.

The latest data also shows a shift from local stations to the national broadcasters. This is particularly driven by an increase in listenership to RTÉ Radio 1, which increased its market share by 2% points year-on-year.

The further closure of cinemas has caused most major movie launches to be put off until the new year. Titles delayed include James Bond No Time to Die, Ghostbusters Afterlife and Disney's Ray and the Last Dragon.

According to Apple, overall traffic across Ireland's major cities has declined by >50% since Level 5 restrictions were introduced, compared to pre-Covid traffic levels.

TV



Live TV viewership increased by 6% year-on-year since Level 5 restrictions were introduced.

For adults 15-34, year-on-year viewership has increased by 9%.

Sport and News dominated Top 10 programming in recent weeks.

The France vs. Ireland rugby match had the highest viewership since Level 5 restrictions were introduced.

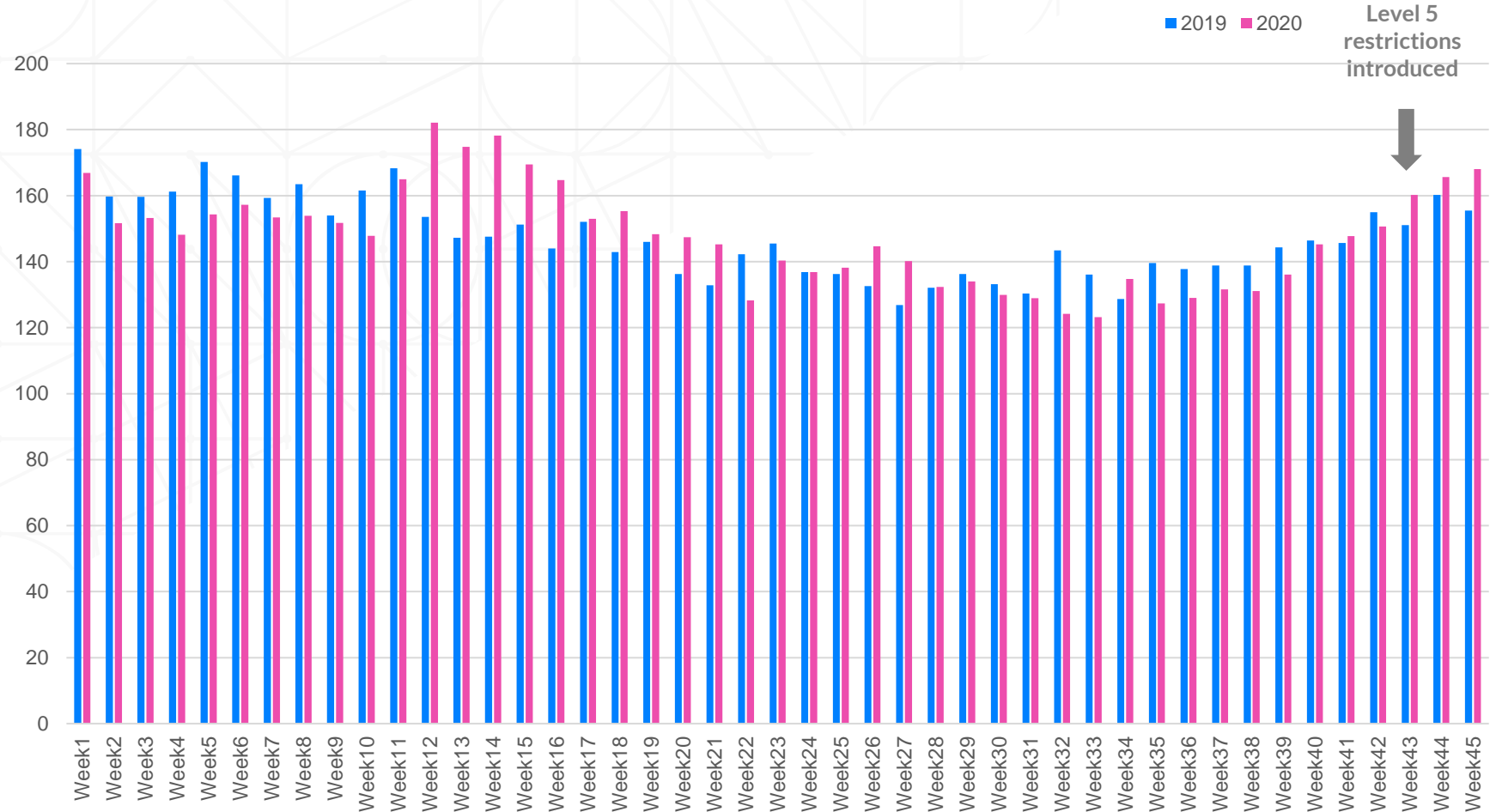
Television (all adults)

Adults now watch about 2 hours 44 minutes of live TV every day.

Year-on-year viewership has increased by 6% since Level 5 restrictions were introduced, reversing a previous trend of declining viewership year-on-year.

This is mainly driven by increased consumption in news and current affairs plus new schedules across all broadcasters.

Live Minutes Viewed per Day All Adults



Source: Nielsen - All adults. Nielsen/TAM (Average Daily Live + VOSDAL Minutes per week)

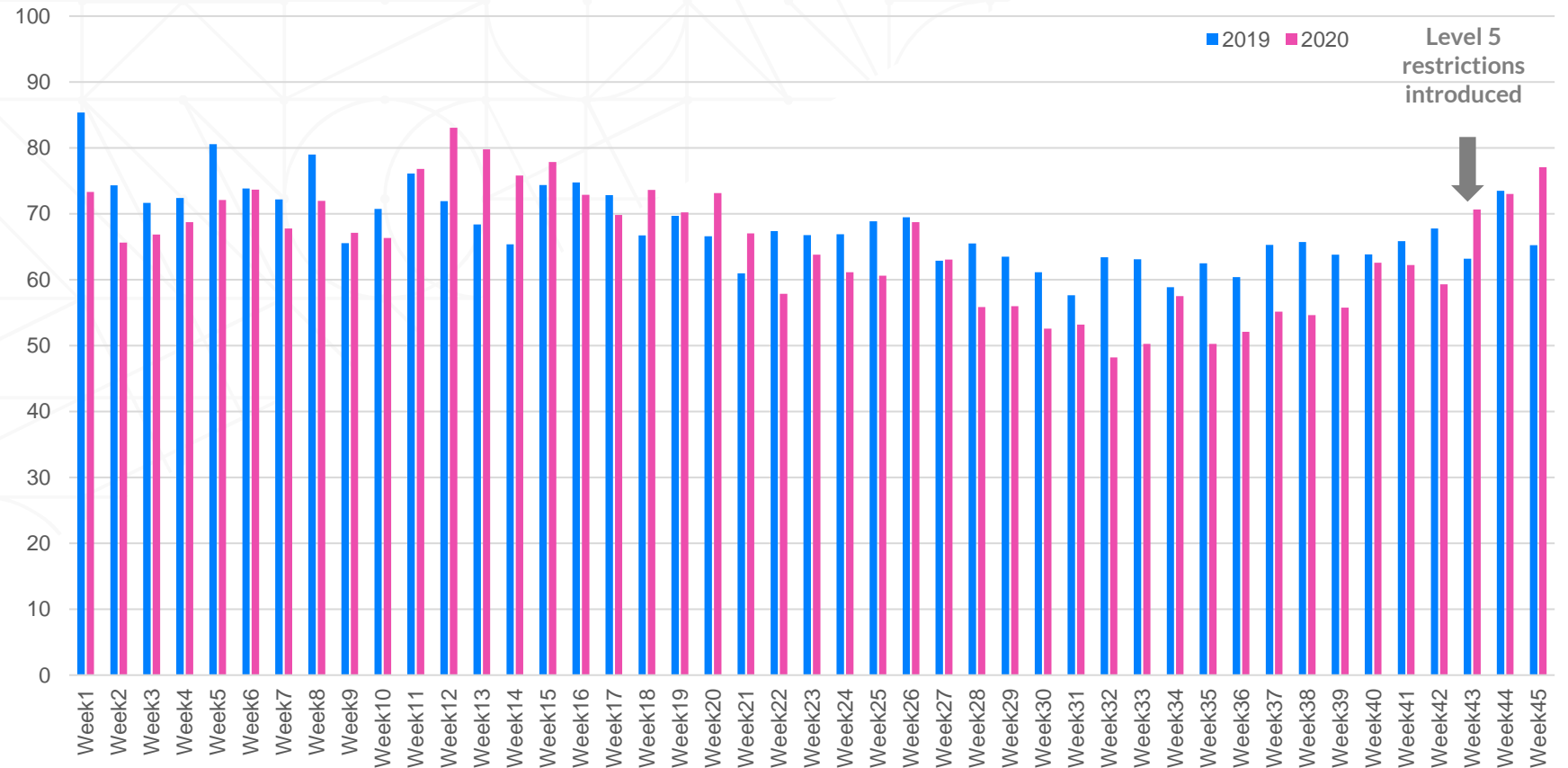
Television (adults 15-34)

Adults 15-34 now watch 73 minutes of live TV every day.

Year-on-year viewership has increased by 9% since Level 5 restrictions were introduced.

Similar to all adults, this is mainly driven by increased consumption of news and current affairs plus new schedules across all broadcasters.

Live Minutes Viewed per Day Adults 15-34



Source: Nielsen - All adults. Nielsen/TAM (Average Daily Live + VOSDAL Minutes per week)

RTÉ Nine O'Clock News

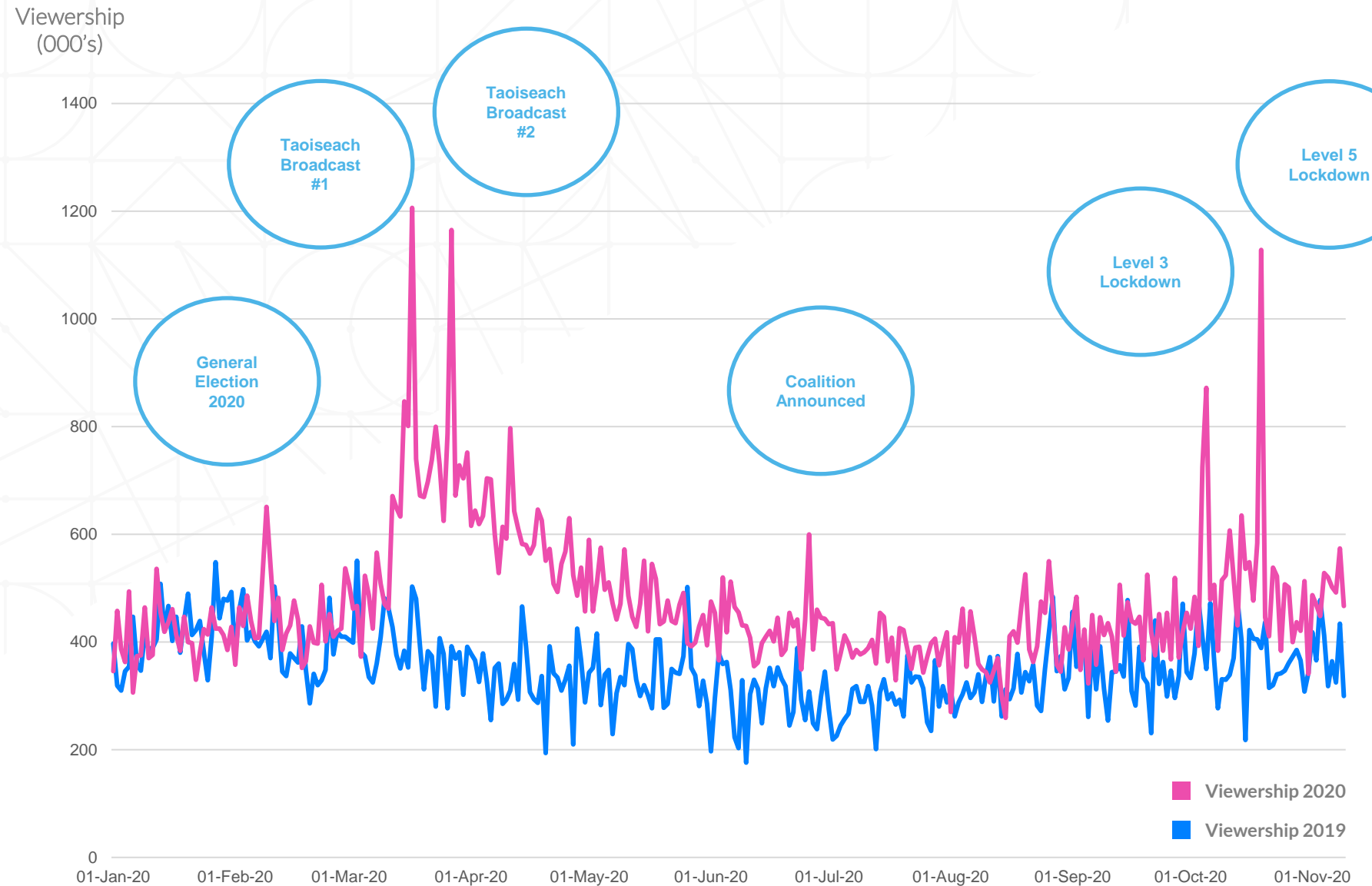
Live viewership of RTÉ's Nine O'Clock News continues to grow year-on-year.

Audience levels have increased by 31% year-on-year since Level 5 restrictions were introduced.

This growth is consistent across the week.

Weekdays and weekends showed similar viewership growth year-on-year.

Live Viewership of Nine O'Clock News on RTÉ 1



Source: Nielsen - All adults. Nielsen/TAM (Average Daily Live + VOSDAL Minutes per week)

Top 10 Programmes 22 October-3 November (All Adult viewership)

Top 10 programmes since Level 5

Sport and News dominate the Top 10 programming charts since Level 5 restrictions were introduced.

Both of Ireland's Six Nations games appear on the charts, reinforcing the importance of sport for broadcasters.

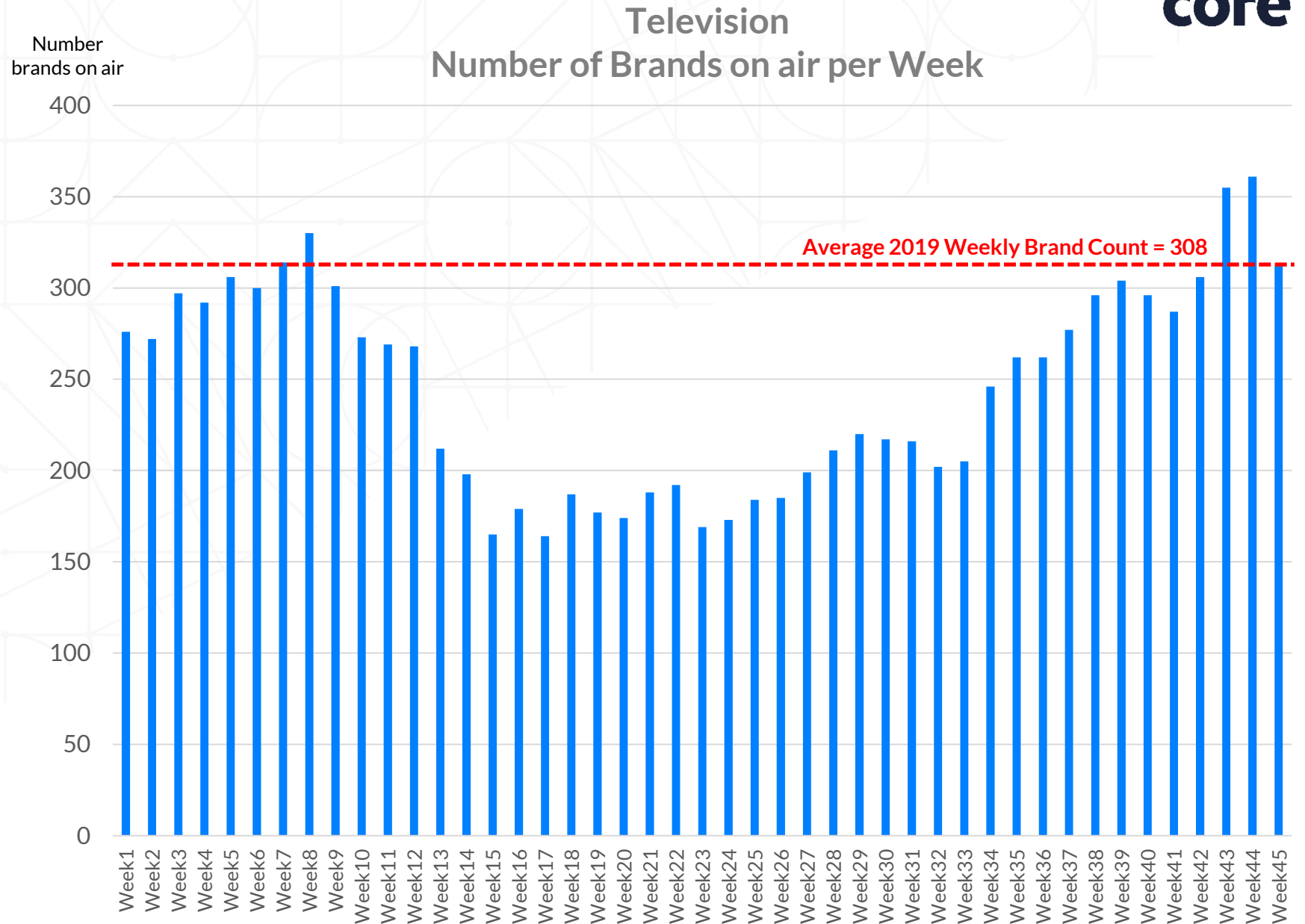
Position	Station	Programme	Audience
1.	Virgin Media 1	Six Nations France versus Ireland	788,440
2.	RTÉ 1	Six One News	689,020
3.	RTÉ 1	The Late Late Show	637,470
4.	RTÉ 1	DIY SOS	587,830
5.	RTÉ 1	Nine O'Clock News	538,290
6.	Virgin Media 1	Six Nations Ireland versus Italy	508,203
7.	RTÉ 1	Reeling in the Years	498,060
8.	RTÉ 1	Dermot's Incredible Homes	444,660
9.	RTÉ 1	Home Rescue	399,010
10.	Virgin Media 1	Coronation Street	383,960

TV Brand Count 2019 v 2020

The number of brands advertising on TV declined dramatically in Q2 due to the immediate impact of Covid-19.

In recent months, this has bounced back with the brand count now above the 2019 average of 308 each week.

Level 5 restrictions have had minimal impact on the number of brands advertising year-on-year.



Source: Nielsen

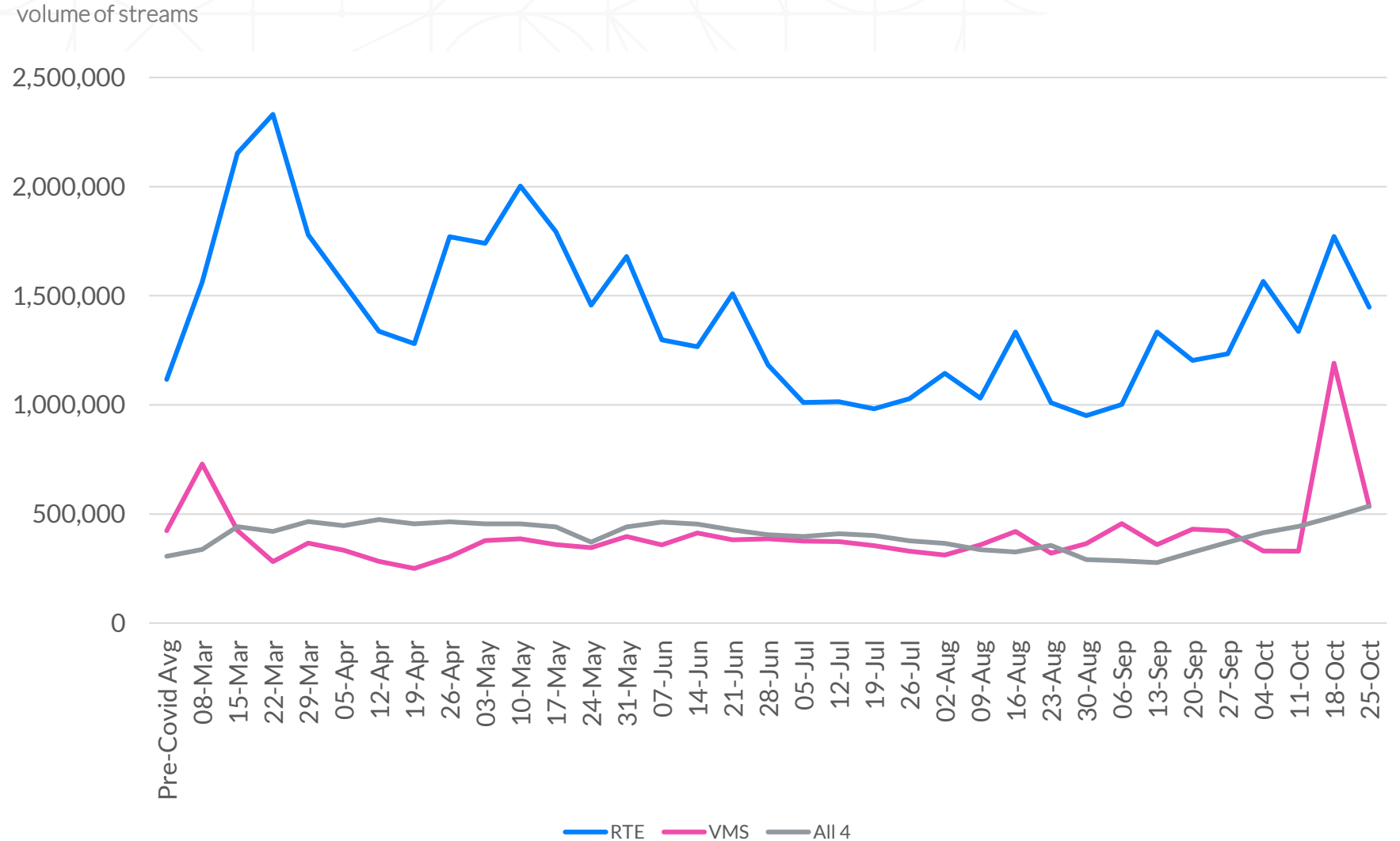
Television streaming

Streaming levels continue to increase with volumes up 30% compared to the previous six weeks, with the RTÉ Player still the dominant player.

‘All 4’ reported a record month in October, up 64% year-on-year, due to the popularity of The Great British Bake Off.

The return of sport, in particular rugby, increased live streaming volumes on Virgin Media Player.

Broadcast VOD Streams per Week



Source: Broadcasters' data

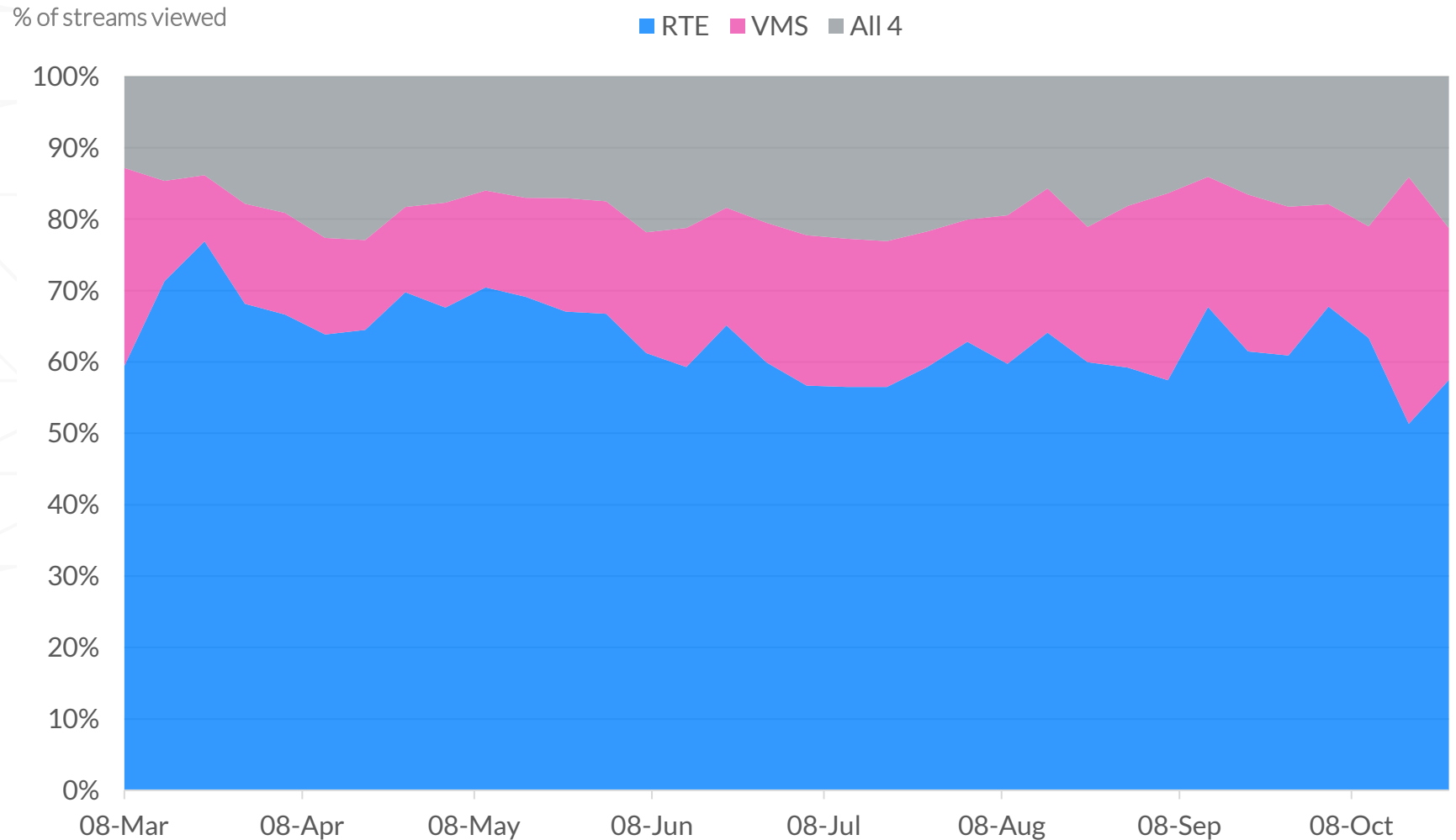
Television streaming (cont.)

While RTÉ's share of streaming remains highest, there has been a steady increase on 'All 4' and Virgin Media Player.

'All 4' consistently averages 18% of total streams viewed.

The week of Ireland vs. Italy in the Six Nations saw Virgin Media's share increase to 35%.

Share of Broadcast VOD Streams per Week



Source: Broadcasters' data

Top 10 streamed programmes

News dominated streamed programming on the RTÉ Player after the introduction of Level 5 restrictions.

The popularity of ‘The Great British Bake Off’ was again noticeable on ‘All 4’, as was the return of ‘Malcolm in the Middle’.

‘Des’ was the most viewed programme on the Virgin Media Player in October.

Top 10 Streamed Programmes October 2020

RTÉ Player	All 4	Virgin Media Player
Nine O'Clock News	The Great British Bake Off	Des
Six One News	Malcolm in the Middle	Coronation Street
Home and Away	Gogglebox	Gogglebox Ireland
EastEnders	Made in Chelsea	Emmerdale
Love/Hate	Scrubs	Champagne Football
The Late Late Show	Hollyoaks	Lodging With Lucy
Fair City	Married at First Sight Australia	15 Days
Neighbours	Married at First Sight UK	The Million Pound Cube
Slovakia v Republic of Ireland	ER	Big Year in Big School
Normal People	Taskmaster	The Deceived

Source: Broadcasters' data (excludes live streaming on Virgin Media Player)

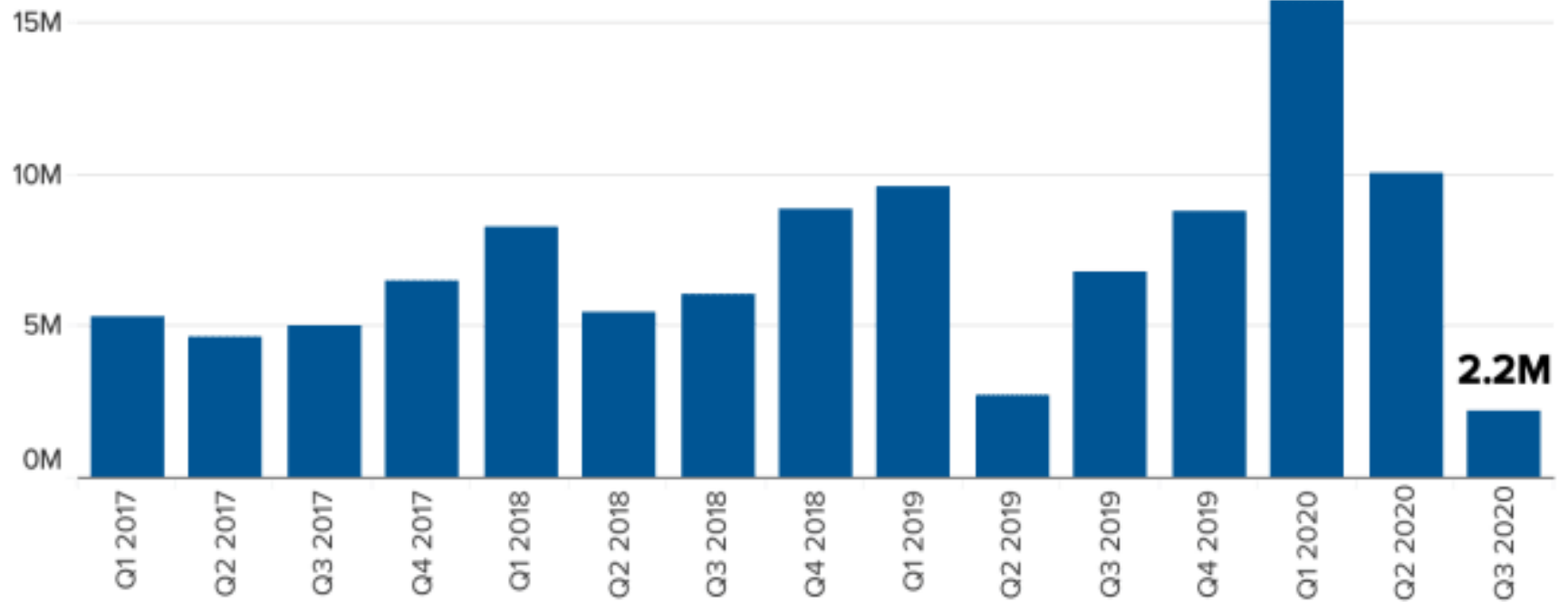
Netflix adds 2.2m subscribers in Q3 2020

While falling short of market estimates, Netflix grew its global subscriber base by a further 2.2m in Q3.

Total number of global subscribers is now 195m.

Netflix attributed the slowing of growth to its record growth in the first half of 2020.

Netflix Growth
Quarterly Paid Subscribers Added Internationally



Netflix is testing a “TV channel”

This month, Netflix announced it is testing a linear TV channel in France designed to help with decision fatigue or indecisive users.

The channel, called Netflix Direct, will be available to Netflix streaming subscribers and will provide content from its existing streaming library but in a linear format, much like broadcast television stations do.



This follows a number of other updates from Netflix, such as the "shuffle" button, which allows people to start watching a random film or TV show, without having to make a decision on what to watch.



News Media

Media critical to Ireland's democracy, says Taoiseach.

For the first time, The New York Times' digital subscriptions generate more revenue than its print revenue.

INM signals end to 'separate resources' for Herald.

News Media (print and digital)

Media critical to Ireland's
democracy, says Taoiseach.

Micheál Martin commented
on the first meeting of the
Future of Media
Commission.

“The media is critical to Ireland’s democracy”, Taoiseach Micheál Martin said, after the inaugural meeting of The Future of Media Commission set up to advise the Government on how the future of news outlets can be assured.

The group is due to report to the Taoiseach and Minister for Media, Catherine Martin, in nine months’ time about how strong independent broadcast, print and digital journalism can be sustainably funded in the future.

It was set up in response to the growing threat to the survival of outlets and providers because of a shift in traditional funding and advertising revenue models.

Mr. Martin said the Commission would examine how the media can survive “in a way that supports informed public discourse and provides platforms for our language, culture, creative arts and sport.”

“A sustainable, independent and objective media landscape plays a critical role in the functioning of democracy and it is important for us to examine how it can be funded into the future,”

Micheál Martin



News Media (print and digital)

For the first time, The New York Times' digital subscriptions generated more revenue than its print ones.

In 2011, The New York Times Company bet on digital readers as the future engine of its business when it started charging for online content — and it has largely been a successful gamble.

The New York Times announced that in Q3 2020, for the first time ever, digital subscriber revenue was greater than the revenue from the print newspaper subscriptions.

The New York Times began charging for online content in 2011, a modest revenue source at the time; however, since then, advertising revenue has continued to decline.

Meanwhile, the digital subscriptions for the New York Times, both for their flagship news brand, as well as for crossword puzzles and other “à la carte” offers for paid content, are growing.

“Our strategy of making journalism worth paying for continues to prove itself out,”

“Digital subscriptions would not only be the central driver of the publisher’s growth, but eventually become its biggest business”.

Meredith Kopit Levien (pictured), who took over as chief executive in September 2020



News Media (print and digital)

INM signals end to 'separate resources' for Herald.

Print edition to continue and will allow INM to concentrate on other strategic goals.

INM subscriber growth continues. As of the 30th October, they have more than 27,000 digital subscribers for the Independent.ie site.

Independent News & Media (INM) will no longer invest in Herald.ie and plans to merge production of the print edition of The Herald with that of other group titles by the end of the year.

The news publisher, owned by Belgian newspaper group Mediahuis, will retain the printed version of The Herald "but we no longer want to commit significant separate resources to this task", it said.

The production of the Dublin-focused newspaper will be integrated with an "enlarged" INM production unit by the end of November or early December 2020.

"We are undertaking some internal reorganisation which will mean that the production of The Herald will be further integrated into the INM newsroom. We are committed to the future of The Herald, which remains Dublin's best paper,"

Peter Vandermeersch (pictured).
Publisher, Independent News & Media.



A photograph of Joe Biden and Kamala Harris standing at a podium. Joe Biden is on the right, wearing a dark suit and a black face mask, with his right hand raised in a wave. Kamala Harris is on the left, wearing a light-colored suit and a black face mask. The background is dark with blue lighting and several palm tree decorations. An American flag is visible on the far left.

Social & Search

Announcement of Level 5 restrictions led to a significant spike in conversation.

5 October saw the highest spike, reaching 15k total mentions within 24 hours.

The UEFA Champions League, Level 5 restrictions, and the US election dominated searches on Google in October and early November.

Social mentions of Covid-19

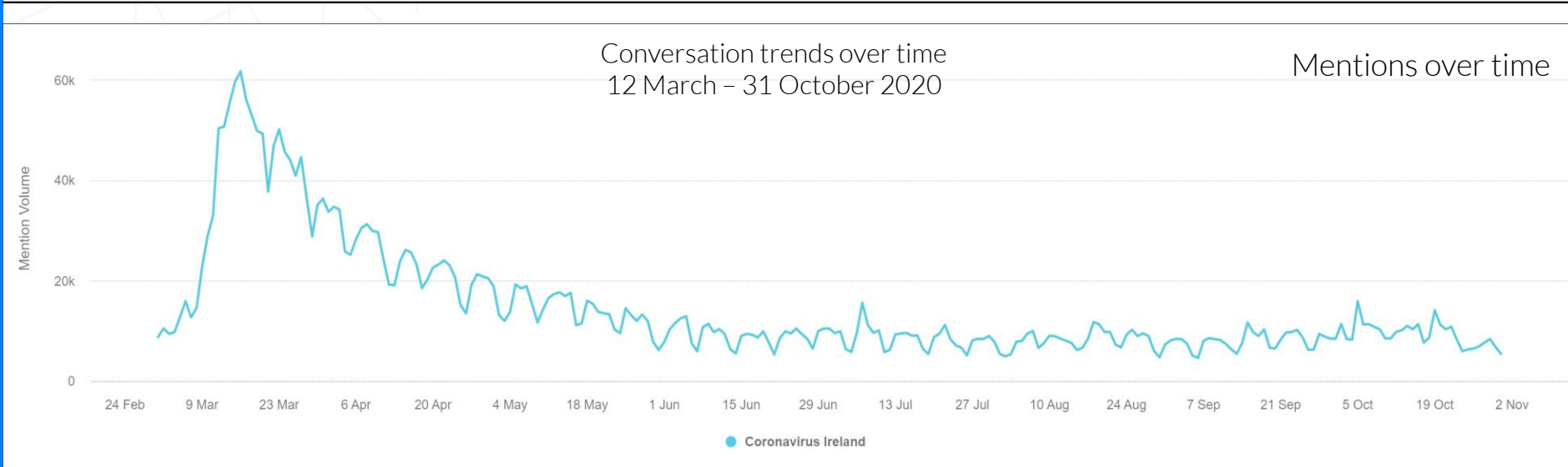
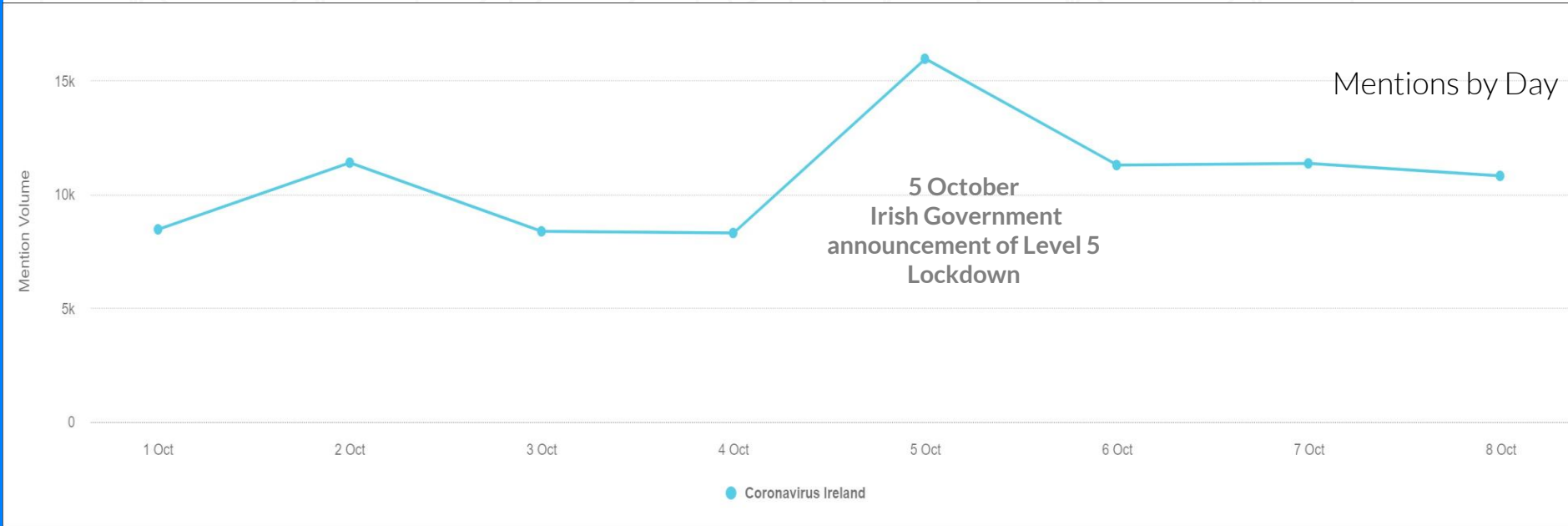
Daily social mentions of COVID 19 has shown a recent lift in activity. This is a reflection of the Government's announcement to introduce Level 5 lockdown restrictions.

5 October showed a significant spike in digital mentions in tandem with Level 5 measures across the country.

Social Media Conversation Volumes

1 – 8 October 2020

core™



Source: BrandWatch (mentions)

Social Media Conversation Volumes

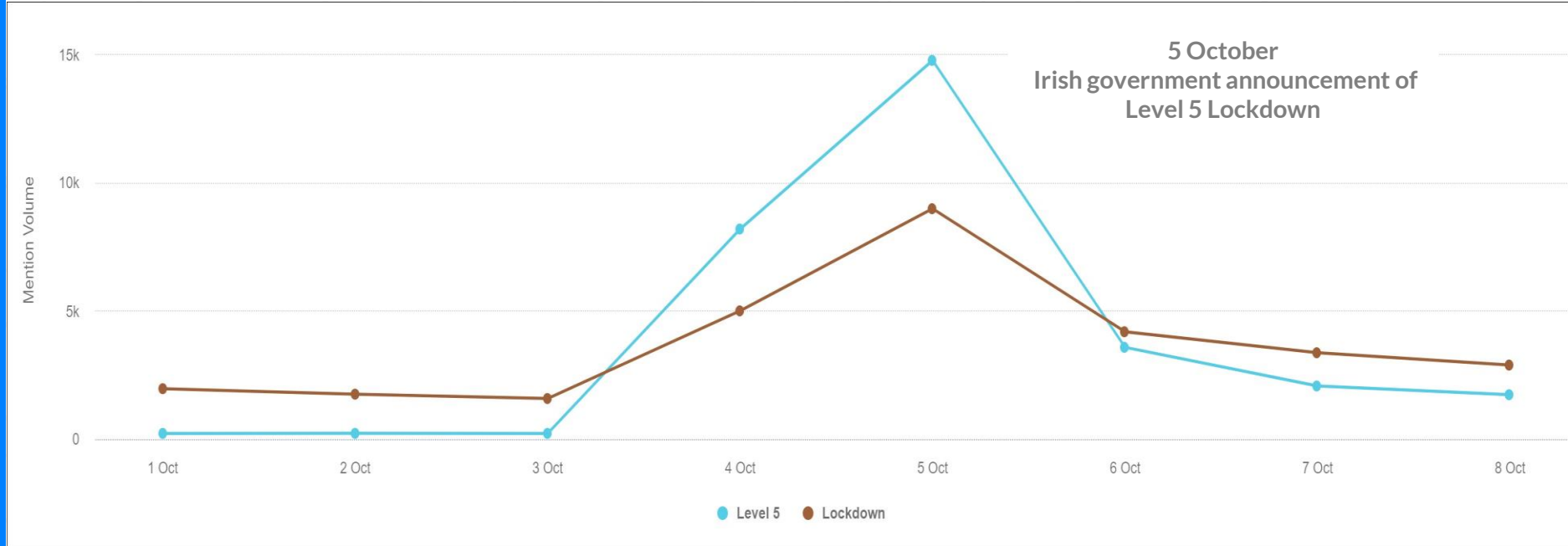
1 – 8 October 2020

core™

Level 5

Mentions of “Level 5 restrictions” have unsurprisingly seen a spike in total mentions. This spike commenced on 5 October reaching 15k total mentions in 24 hours.

The phrase “Lockdown” has also seen a strong lift in mentions coinciding with Level 5 mentions.



Source: Brandwatch, RTÉ News, Twitter

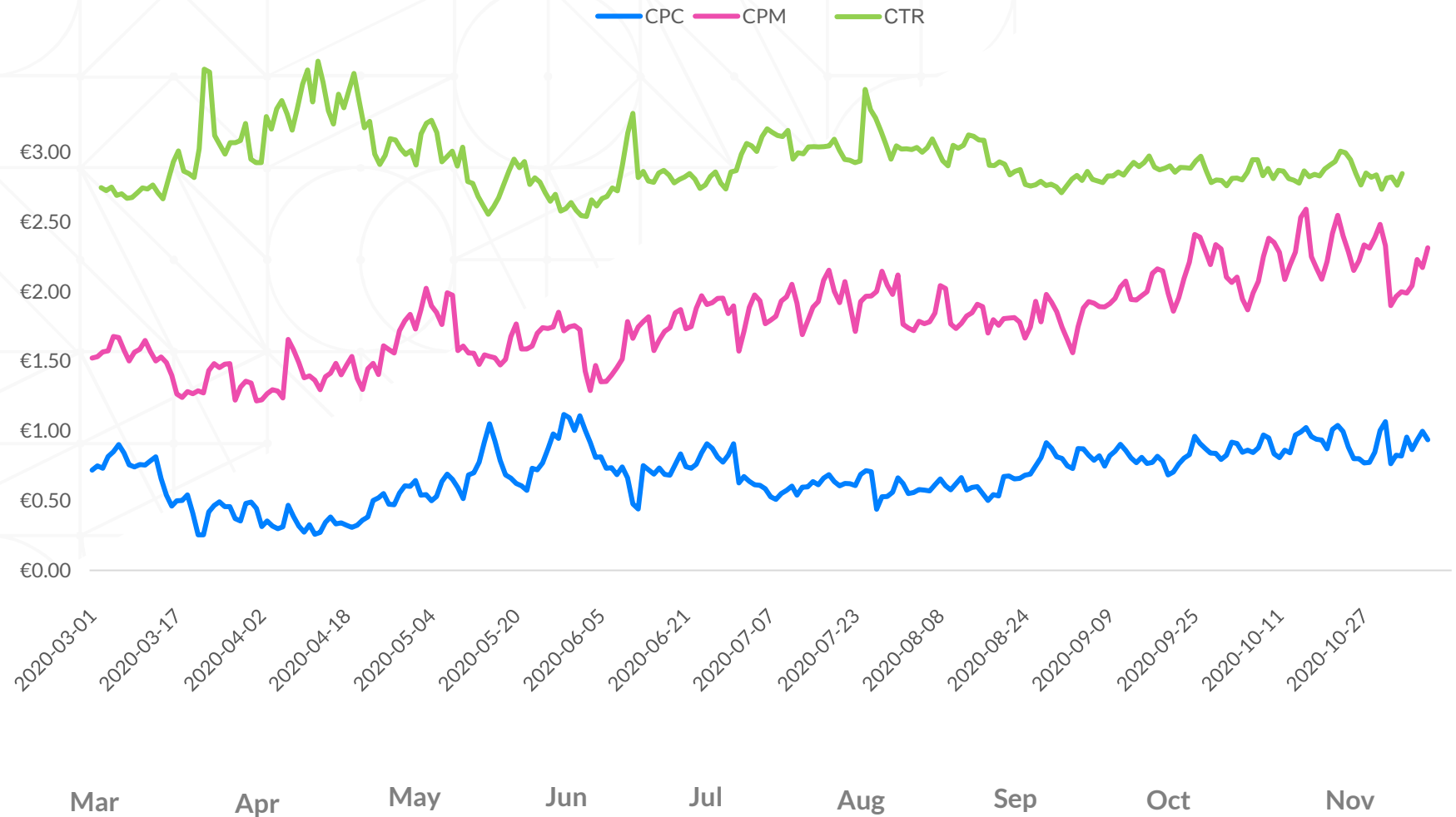
Social advertising performance

October 2020 saw continued growth in investment as we approach the end of the year.

This increase has resulted in a rise in inflation over the past 3 months compared with Q1 of 2020.

Cost per thousand (CPM) is up almost 20% and cost per click (CPC) is up 5%.

Daily Social KPIs



Source: Facebook API. CPM = Cost per thousand. CTR = Click through rate. CPC = Cost per click.

Q3 earnings highlights

For Facebook, Google and Amazon, ad revenue growth rates beat all expectations for Q3 2020.

The growth is attributed to heavy direct response e-commerce activity as the pandemic continues to push more businesses online.



Facebook Ad revenues up 22% year-on-year

Minimal impact from the July boycott and the continuing pandemic.

Facebook attributes this growth largely to increased activity from SMEs that "lend themselves" to online commerce.

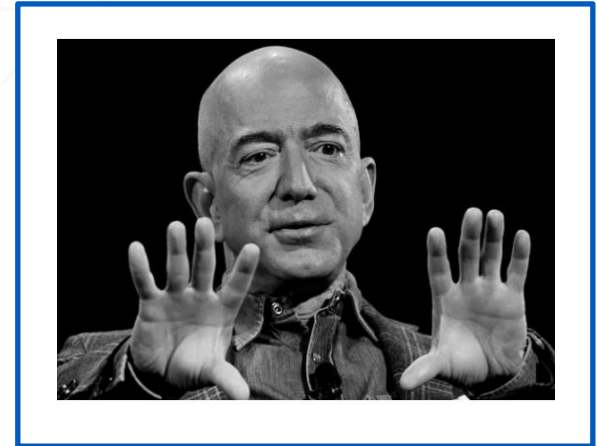


Google saw similar growth, driven primarily by direct response advertisers.

YouTube DR drove largest growth plus an increase in brand activity.

Global ad spend up as follows:

- 6.5% year-on-year for search
- 32.4% year-on-year for YouTube



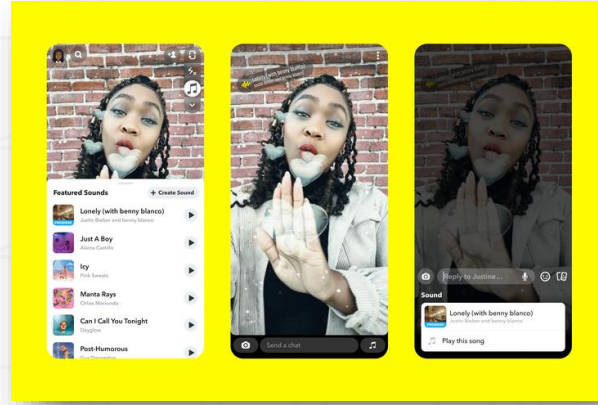
Amazon reported a 37.4% increase in advertising revenues year-on-year.

This is in addition to continued growth in e-commerce sales.

Other Q3 social highlights

Snap, Pinterest and TikTok are ramping up for the remainder of the year with new product/platform developments aimed at driving growth.

Key trends across all platforms are in music, gaming, ecommerce and video.



Trends are music, games, ecommerce and video.

Snap

- Ad revenue up 52% year-on-year.
- SoundCloud rolled out integration with Snapchat.
- You can now share your own tracks on Snapchat with the app's SoundCloud integration.
- The platform is on its way to being a music-sharing service.

Pinterest

- Ad revenue up 58% year-on-year.
- The platform saw a 37% increase in monthly active users since 2019, with strong growth among young users.

TikTok

- Ad revenue up 42% year-on-year.
- Making moves in social commerce with Shopify integration.
- Partnered with Shopify to allow users to shop as they scroll.

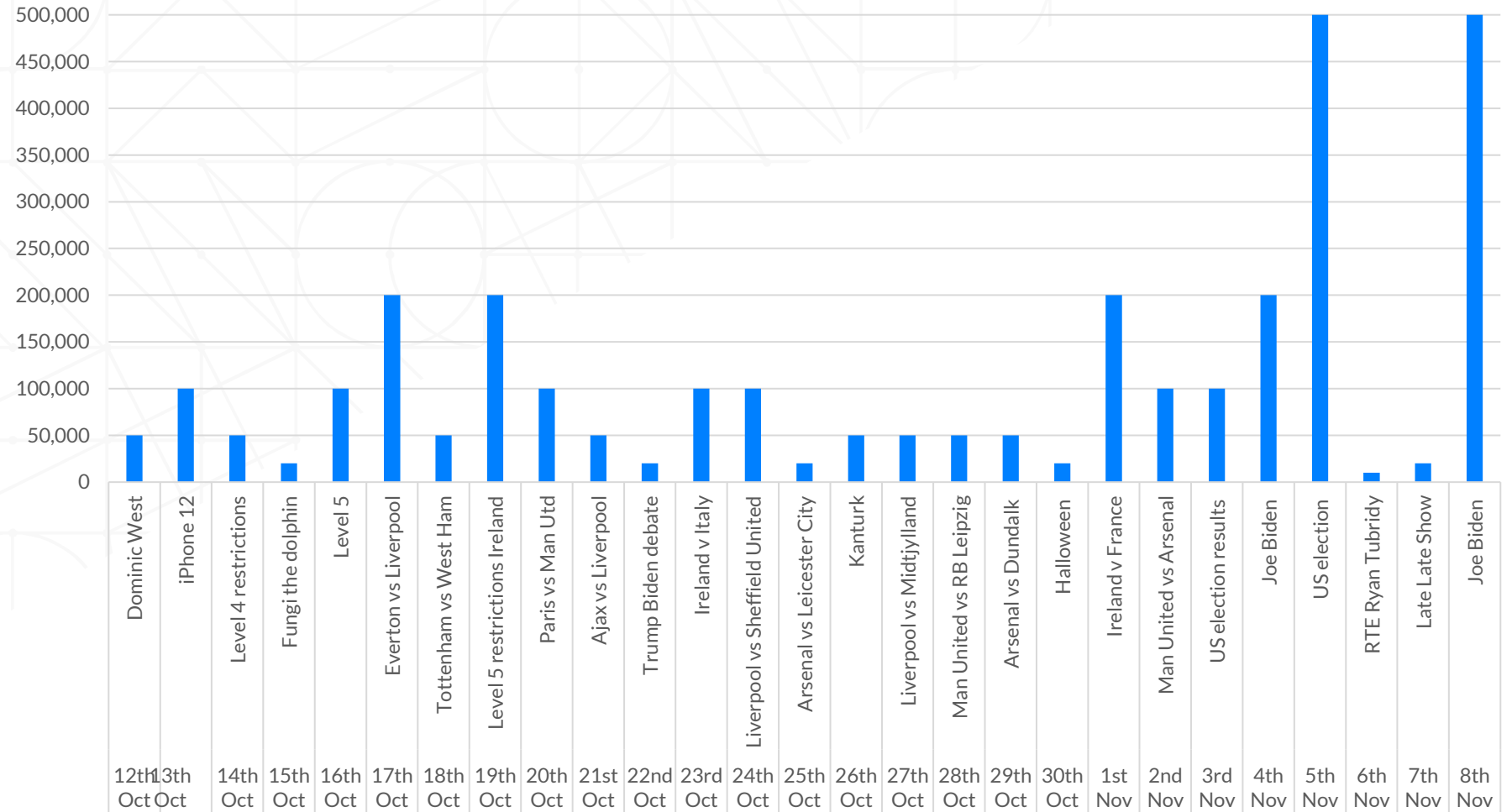
Top searches per day

Searches for sporting fixtures dominated in October, as well as some searches for Level 5 restrictions as the second lockdown was announced.

November was all about the US elections with a huge spike in searches for “Joe Biden” and “US Election” before the results were announced.

Top Searches in Ireland 12 October- 8 November 2020

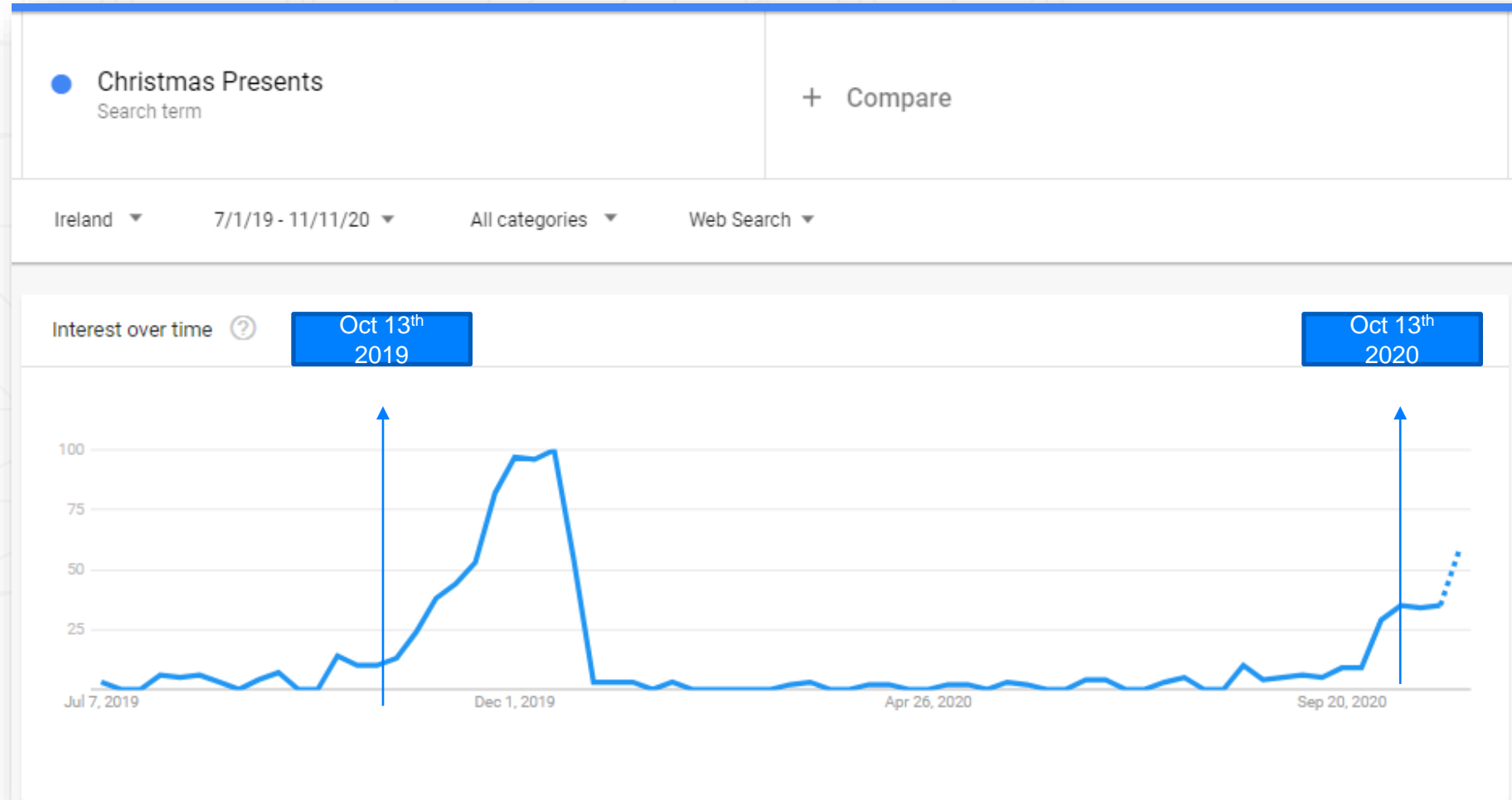
Search Volumes



Commerce and ecommerce searches

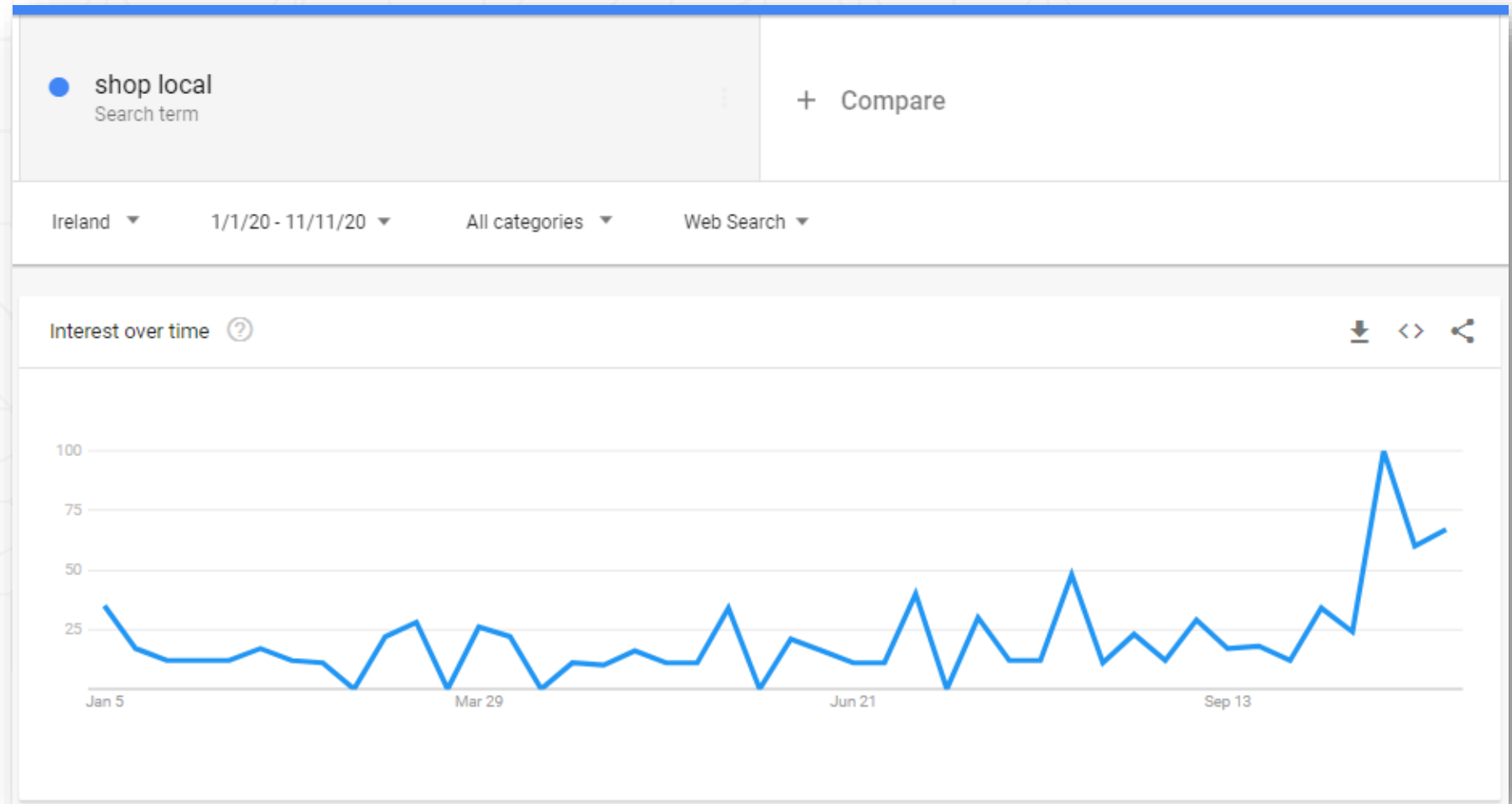
Christmas started earlier this year with a rise in Christmas present-related searches.

The early rise coincides with Ireland's retailers closing for a second time and concerns about Christmas shopping with lockdown announced until 2 December 2020.



Commerce and ecommerce searches

Supporting local Irish businesses and shopping locally is a trend seen recently in search traffic and on social media.



Audio

Latest figures from the JNLR show that time spent listening to radio has increased to 250 mins on an average weekday, +5% year-on-year.

Overall, radio's reach remained steady with 81% of all adults listening each day.

Data showed a slight migration from local to national news stations driven by the Covid lockdown desire for news content

Audio – latest JNLR results

Latest JNLR figures show that radio's reach has remained unchanged year-on-year with 81% of adults listening each day.

Overall, there has been a migration of audience from local to national, news-based stations, which saw listenership grow by 2% year-on-year.

81%

of all adults listened to any **radio station** yesterday.

No change year-on-year

45%

of all adults listened to any **national radio station** yesterday.

Up 2% year-on-year

55%

of all adults listened to any **regional/local/multicity radio station** yesterday.

Down 1% year-on-year

Audio – latest JNLR results

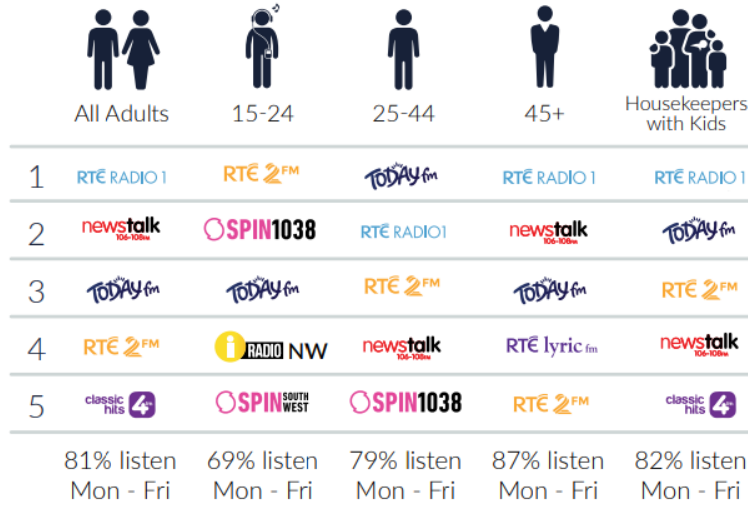
The latest figures show that time spent listening to radio has increased to 250 mins on an average weekday – an increase of 6% year-on-year.

Morning Ireland remains Ireland’s most popular radio show with significant growth year-on-year reflecting a general migration toward news content during Covid lockdown. RTÉ Radio 1 saw an increase on 5 PP in Dublin.



AUDIENCES

(PP – Refers to the percentage point shift year on year.)



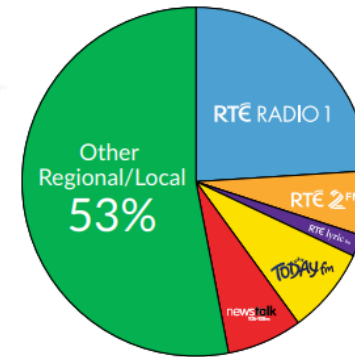
Above figures are listened yesterday, weekdays.

Average weekday minutes listened (all radio) (full year)



STATION SHARE

Market share of radio audience 7am-7pm (PP – Refers to the percentage point shift year on year.)



NATIONAL

Station	Share	Up / Down PP
RTÉ Radio 1	24%	Up 2pp
RTÉ 2FM	6%	No Change
RTÉ lyric FM	2%	No Change
Today FM	8%	No Change
Newstalk	7%	No Change
Other Regional/Local	53%	Down 2pp

TOP 5 PROGRAMMES



Source: JNLR (PP= percentage points)

Audio - top podcasts in Ireland

The Top Ten podcasts in Ireland continue to be a mix of different content genres from international and local podcasters.

The Tommy and Hector Podcast with Laurita Blewit keeps its position at the top of the Irish podcast charts.

The Laughs of Your Life with Doireann Garrihy is another podcast proving extremely popular with Irish podcast listeners.

Having stood in for Ryan Tubridy recently, Callan's Kicks rose 10 places to 4th position.

With all eyes (and ears) on the US Presidential Election, The Daily from The New York Times Kept Irish audiences well-informed.

The 2 Johnnies Podcast, The Stand with Eamon Dunphy, and The David McWilliams Podcast all maintained their position in the Top Ten.

Top Podcasts in Ireland

Position	Shows
1. ▶	The Tommy and Hector Podcast
2. ▶	The Laughs of Your Life
3. ▲2	The Daily
4. ▲10	Callan's Kicks
5. ▼2	The 2 Johnnies Podcast
6. ▶	The Stand with Eamon Dunphy
7. ▼1	Dr. Death Season 2
8. ▶	The Joe Rogan Experience
9. ▲3	The David McWilliams Podcast
10. ▶	The Blindboy Podcast

Cinema & OOH

A photograph of a cinema auditorium with rows of red seats. A single person wearing a white face mask and glasses is seated in the middle of the rows, looking towards the camera. The background is dark, with a sign visible in the distance.

Cinemas are currently closed under Level 5 restrictions. This has caused many movie releases to be moved to the New Year, including James Bond No Time to Die, Ghostbusters Afterlife, Disney's Raya and the Last Dragon.

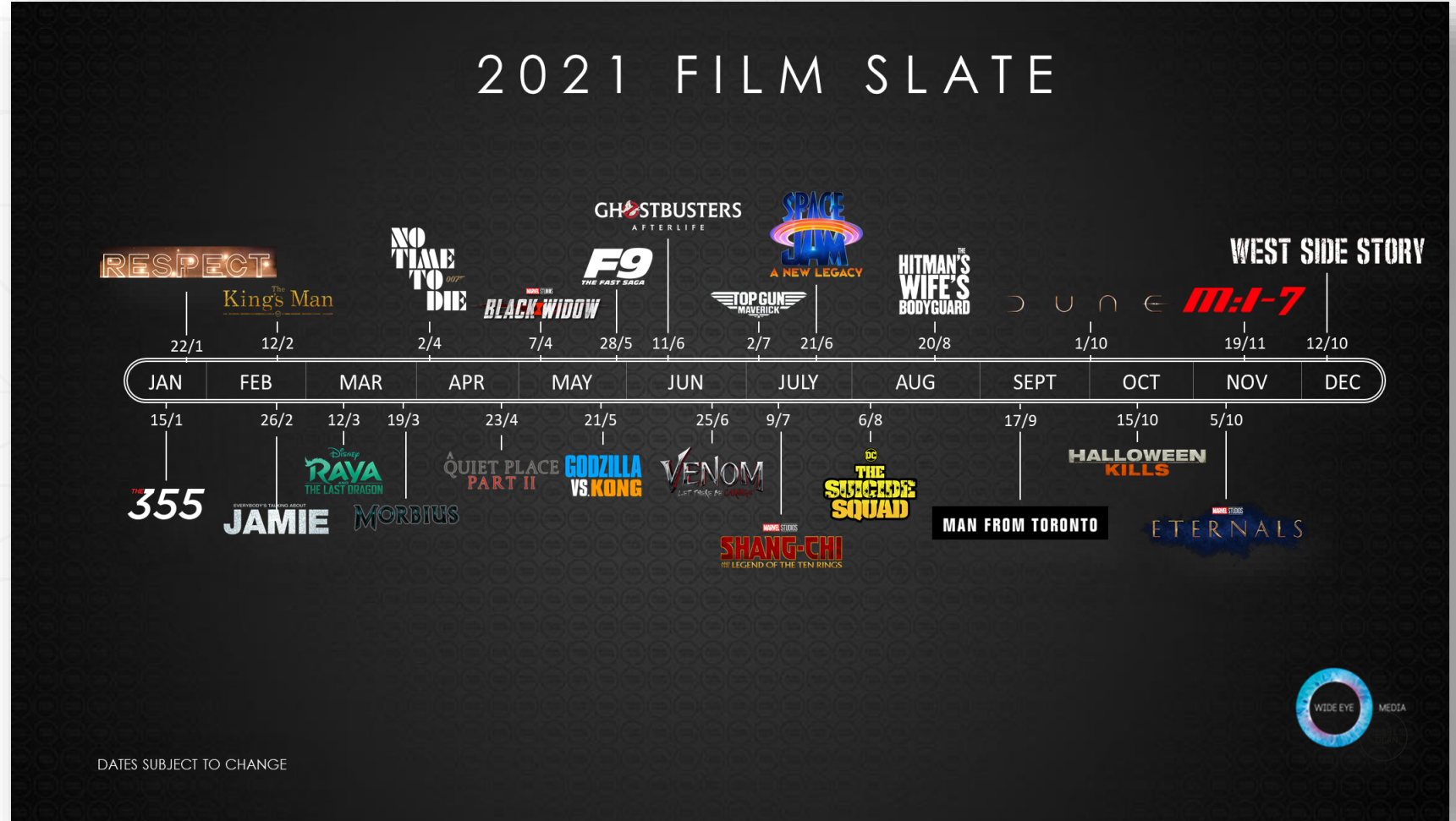
Nationwide, road traffic levels have declined by >50% across all major cities, since Level 5 restrictions were introduced.

Cinema

Cinemas are closed due to Level 5 restrictions.

There is a full schedule of new releases planned for the new year, including James Bond No Time To Die, Ghostbusters Afterlife, and Disney's Raya and the Last Dragon.

These releases are subject to change based on Covid restrictions locally and globally.

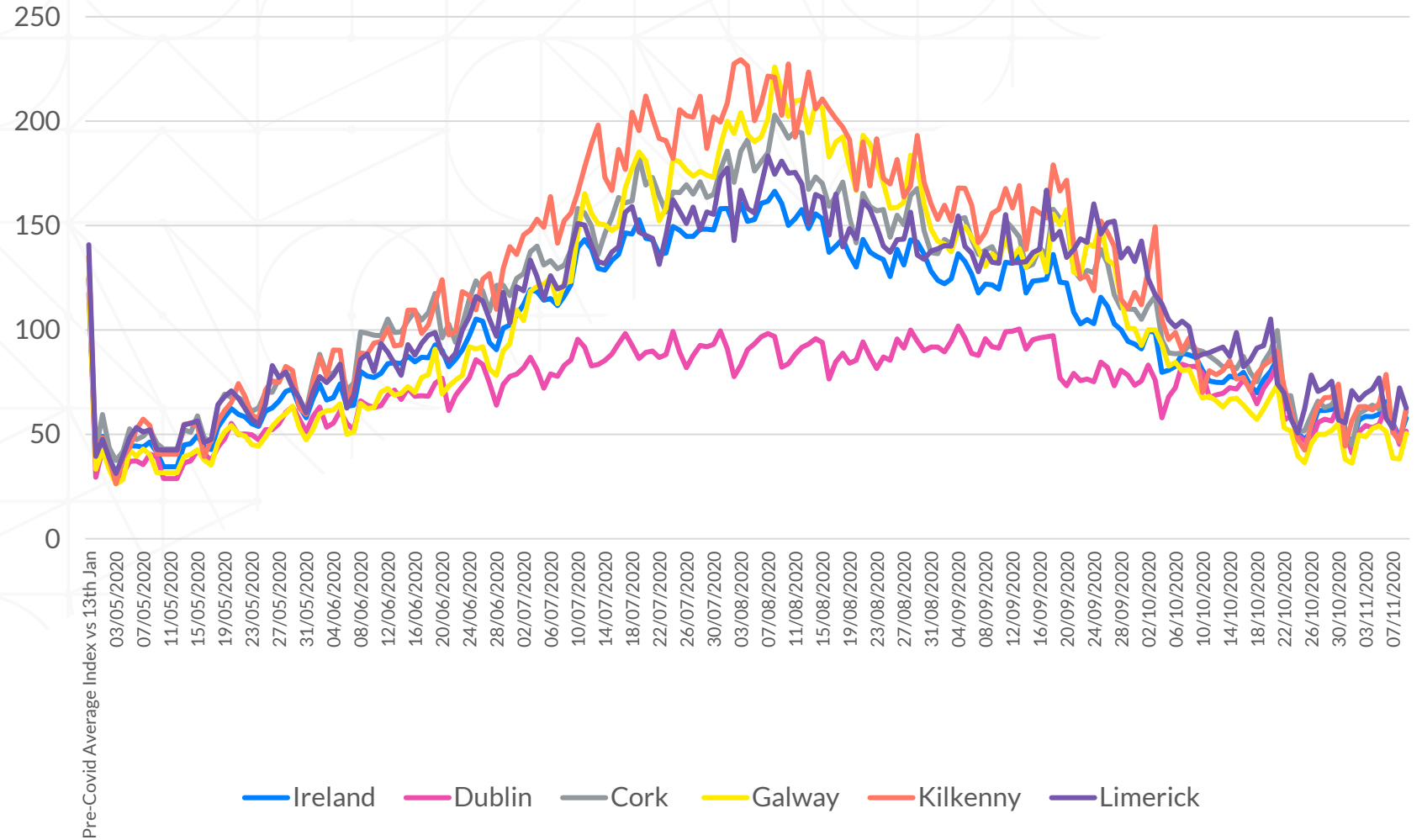


Out-of-Home

Latest data from Apple shows that since Level 5 restrictions were introduced, road traffic levels have decreased by >50% compared to pre-Covid levels.

These figures are consistent across all major cities in Ireland.

Driving Journeys Indexed vs. 13th Jan



Source: Apple mobility trends report

About Core

We are Ireland's largest marketing communications company, collaborating across nine practices, providing services in sponsorship, strategy, research, investment, media, creative, learning, data and recruitment.

- For more information

onecore.ie
+353 1 649 6316