

Irish Media Consumption report

H1 2022

Core

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Executive Summary

H1 media consumption returned to pre-Covid trends with TV witnessing a decline across all audiences.

At the same time, the online video platforms continue to see growth in consumption with Connected TV beginning to lead as the platform of choice.

Both OOH and Cinema are witnessing large growth as traffic levels and footfall increase year-on-year.

Over 5.3 million people visited the cinema in H1, which is 25% behind the same period in 2019.

Adult TV viewership declined by 8.1% year-on-year in H1.
For Adults 25-44, year-on-year viewership declined by 14.2%.
For Adults 15-34, year-on-year viewership declined by 17.8%.

Live sport once again dominates the top 10 programmes for H1. 6 of the top 10 programmes were in this category with the Six Nations match between France and Ireland coming on at number one.

Compared to H1 2019, overall streams have increased across all the key players. All 4 grew by 75%, RTÉ grew by 60% and TG4 grew by 59%.

Streaming on a TV continues to rise in 2022, with more than 40% of (certain) broadcast player streams now watched on a TV screen.

Released annually, this years Reuters Institute Digital News Report, shows RTÉ, TheJournal.ie, and Independent.ie to be the most frequently accessed sources of digital news and updates.

Similar to 2021, 16% of Irish people are now paying for news subscriptions, a figure which has remained flat year-on-year, but as a nation we are more willing than our EU (15%) or UK (8%) counterparts to pay for news.

Online conversation and searches were dominated by the tragic murder of Aisling Murphy in January. The war in Ukraine was a major talking point in February and March.

Numerous sporting events dominated both social and search activity throughout the first six months of the year., including UEFA Champions League Final, 2022 Masters and Cheltenham.

Nearly four in five adults, or close to 3.2m people, listen to radio every weekday, according to the latest JNLR/Ipsos radio listenership report covering the 12 months to the end of June.

Over 5.3m people visited the cinema between January and June. Top Gun: Maverick was the number one movie in the box office taking in €5.025 million in revenue., followed by The Batman with €4.4 million in revenue. Overall, admissions are now 25% below pre-Covid levels (H1 2019), which was a record breaking year for box office takings.

In April and May, the volume of people in retail and hospitality returned to pre-pandemic levels, and there is also a continued growth and interest in the great outdoors.

TV & Video

Adult TV viewership declined by 8.1% year-on-year in H1.

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Compared to H1 2019, overall streams have increased across all the key players.
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Television (All Adults)

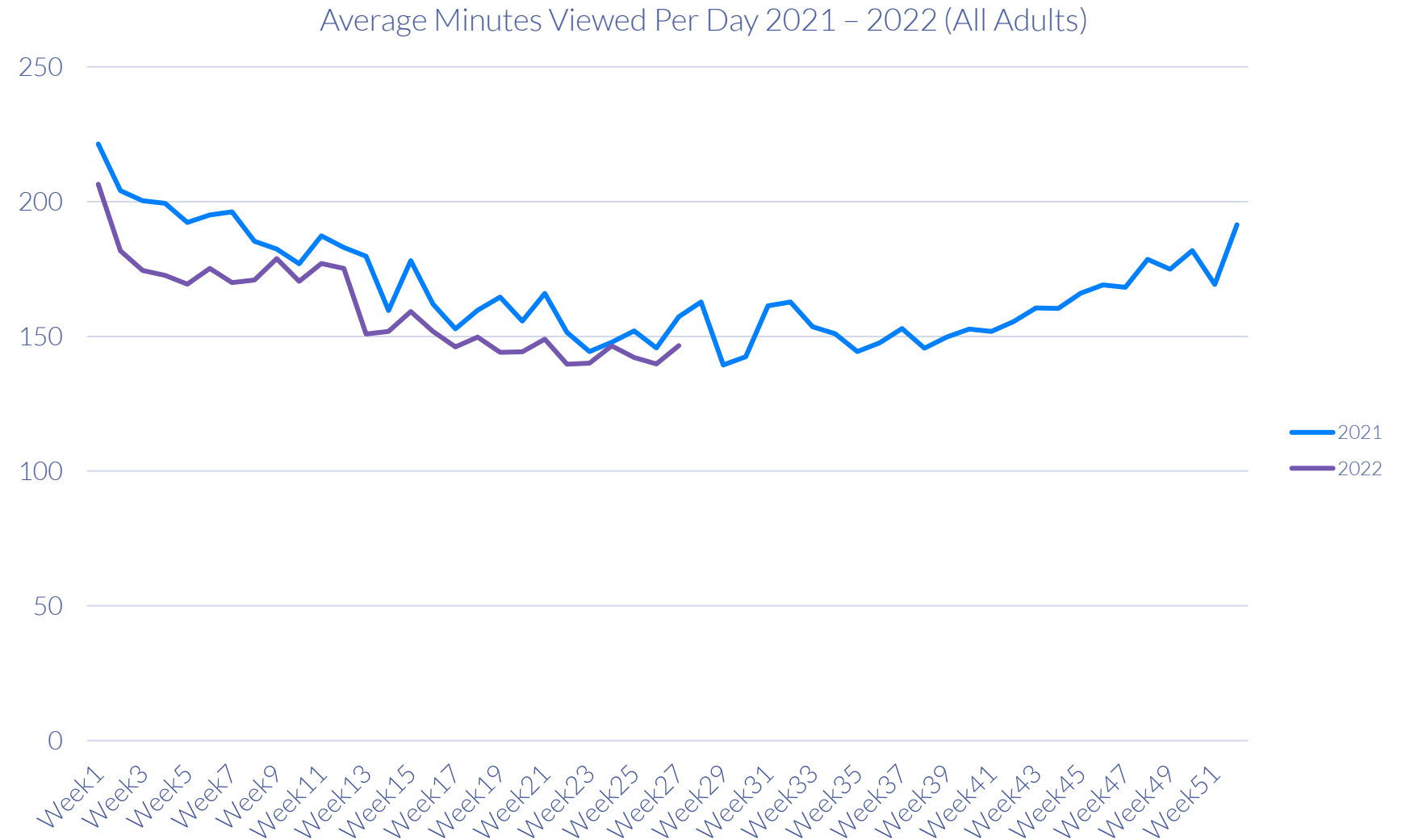
From January to June, Adult TV viewing was down by 8.1%.

The rate of decline has slowed during the last three months.

In real terms, this is still an average of over 2 hours and 40 minutes per day for each adult in Ireland.

The most watched programmes for this audience in H1 were –

1. Six Nations Live: France v Ireland
2. Six Nations Live: England v Ireland
3. Six Nations Live: Ireland v Wales



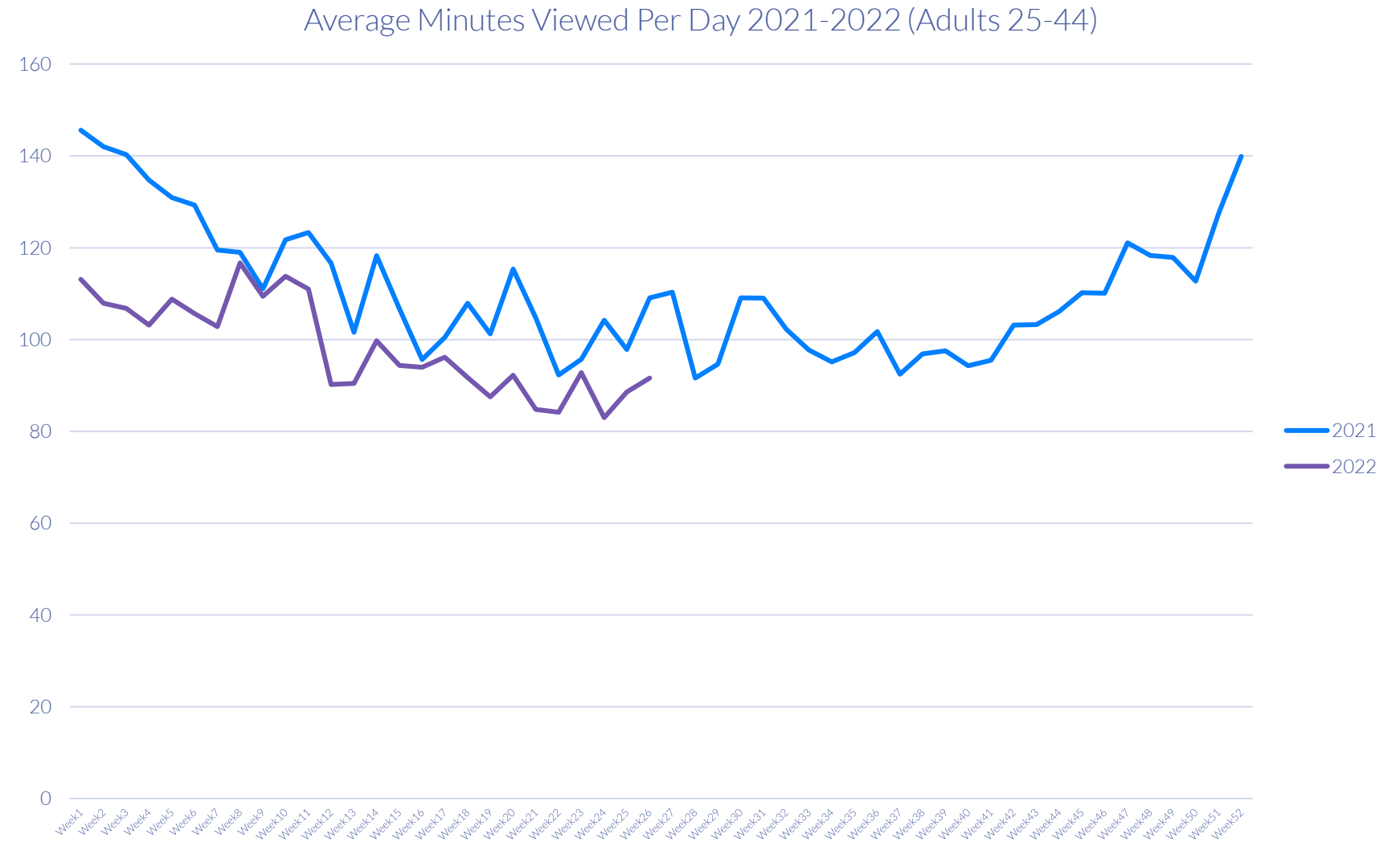
Television (Adults 25-44)

Between January and June 2022, Adults 25-44 viewed on average over an hour and a half of TV per day (98.5 minutes per day).

This represents a reduction of 14.2% versus the same period in 2021.

The most watched programmes for this audience in H1 were –

1. Six Nations Live – France v Ireland
2. Six Nations Live – Ireland v Wales
3. Six Nations Live – England v Ireland



Source: Nielsen – Adults1534. Nielsen/TAM (Average Daily Minutes – Consolidated Viewership)

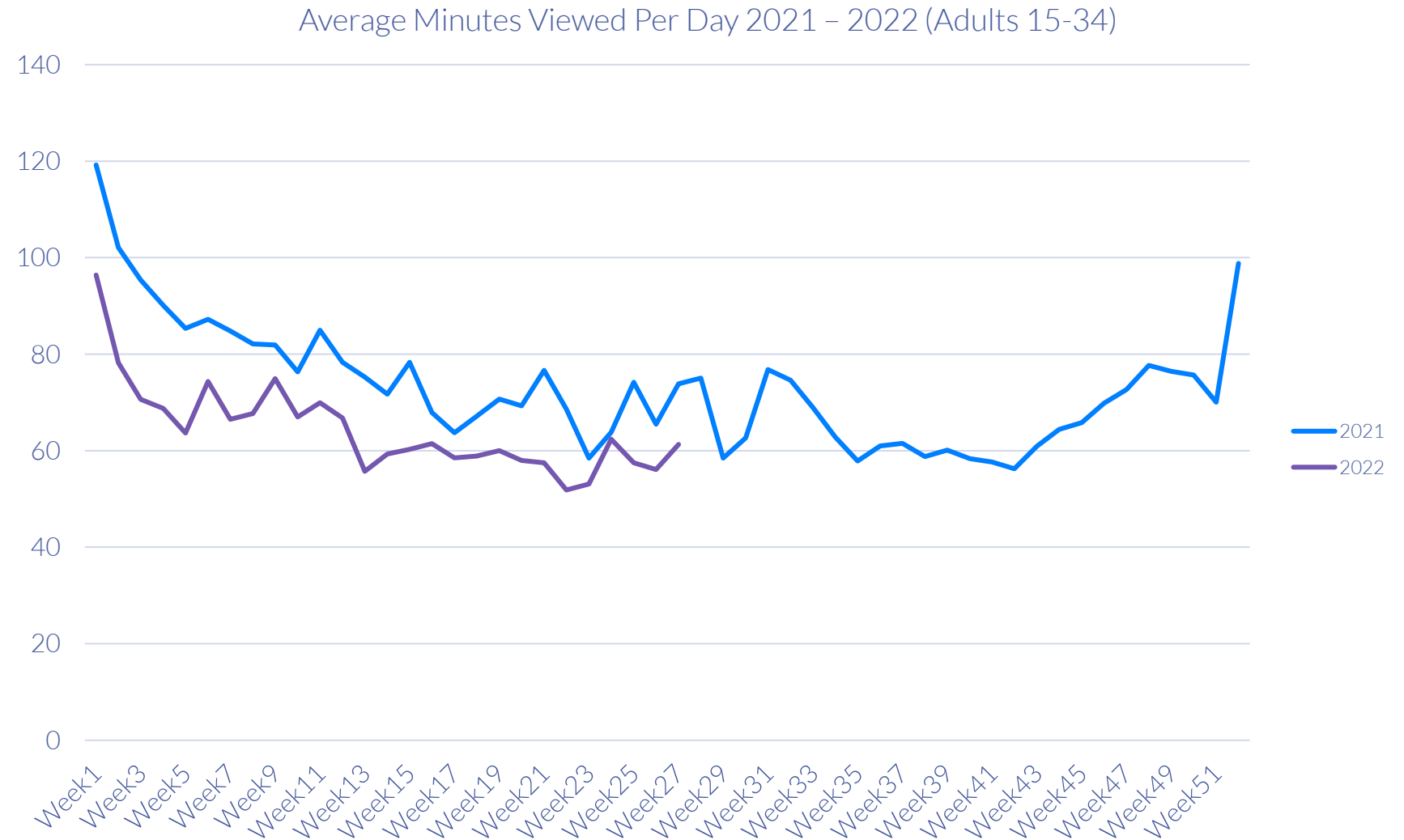
Television (Adults 15-34)

Between January and June 2022, Adults 15-34 viewed on average over an hour of TV per day (64.4 minutes per day).

This represents a reduction of 17.8% versus the same period in 2021.

The most watched programmes for this audience in H1 were –

1. Six Nations Live: France v Ireland
2. Six Nations Live: Ireland v Wales
3. Love Island



Top 10 television programmes

Live sport once again dominates the top 10 programmes for H1.

6 of the top 10 programmes were in this category with the Six Nations game between France and Ireland coming in at number one.

Even though we have witnessed a trend of news fatigue versus the lockdown period, two of the most watched programmes in the top 10 were news, on the 21st of January and 6th of March.

The 21st of January was the day the government announced the lifting of most Covid restrictions in Ireland.

Top 10 Programmes Jan - Jun 2022 (All Adult viewership)

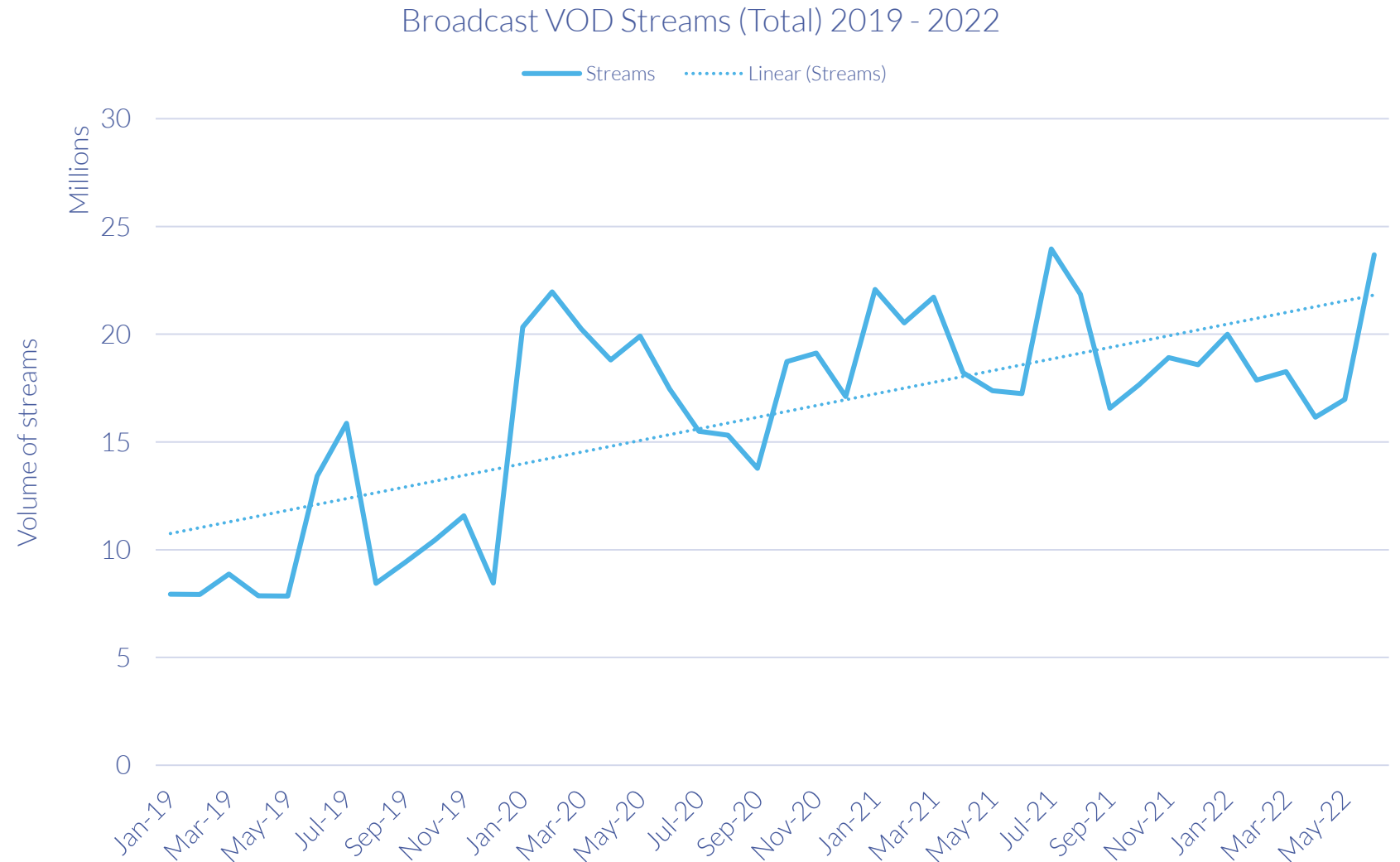
Position	Station	Programme	Viewers
1	VM-One	Six Nations Live: France v Ireland	761,582
2	RTÉ2	Six Nations Live: England v Ireland	713,521
3	RTÉ2	Six Nations Live: Ireland v Wales	665,460
4	VM-One	Six Nations Live: Ireland v Scotland	639,581
5	RTÉ1	RTÉ News: Six One	624,793
6	RTÉ1	Room To Improve	580,429
7	RTÉ1	RTÉ News: Nine O'Clock	573,035
8	RTÉ1	The Late Late Show	547,156
9	RTÉ2	GAA Live: Kerry v Mayo	524,974
10	RTÉ2	Champions League Live: Liverpool v Real Madrid	510,186

Broadcaster VOD streaming

Looking back since 2019, we can see how pronounced streaming growth has been over the past three and a half years.

Versus H1 2019, broadcaster VOD streaming has increased +44% in 2022.

While news played a major role in 2020 during the Covid-19 pandemic, other contributors to this growth have been increased access (i.e. TV VOD Apps), boxset consumption, and the migration of light tv audiences to streaming video players.



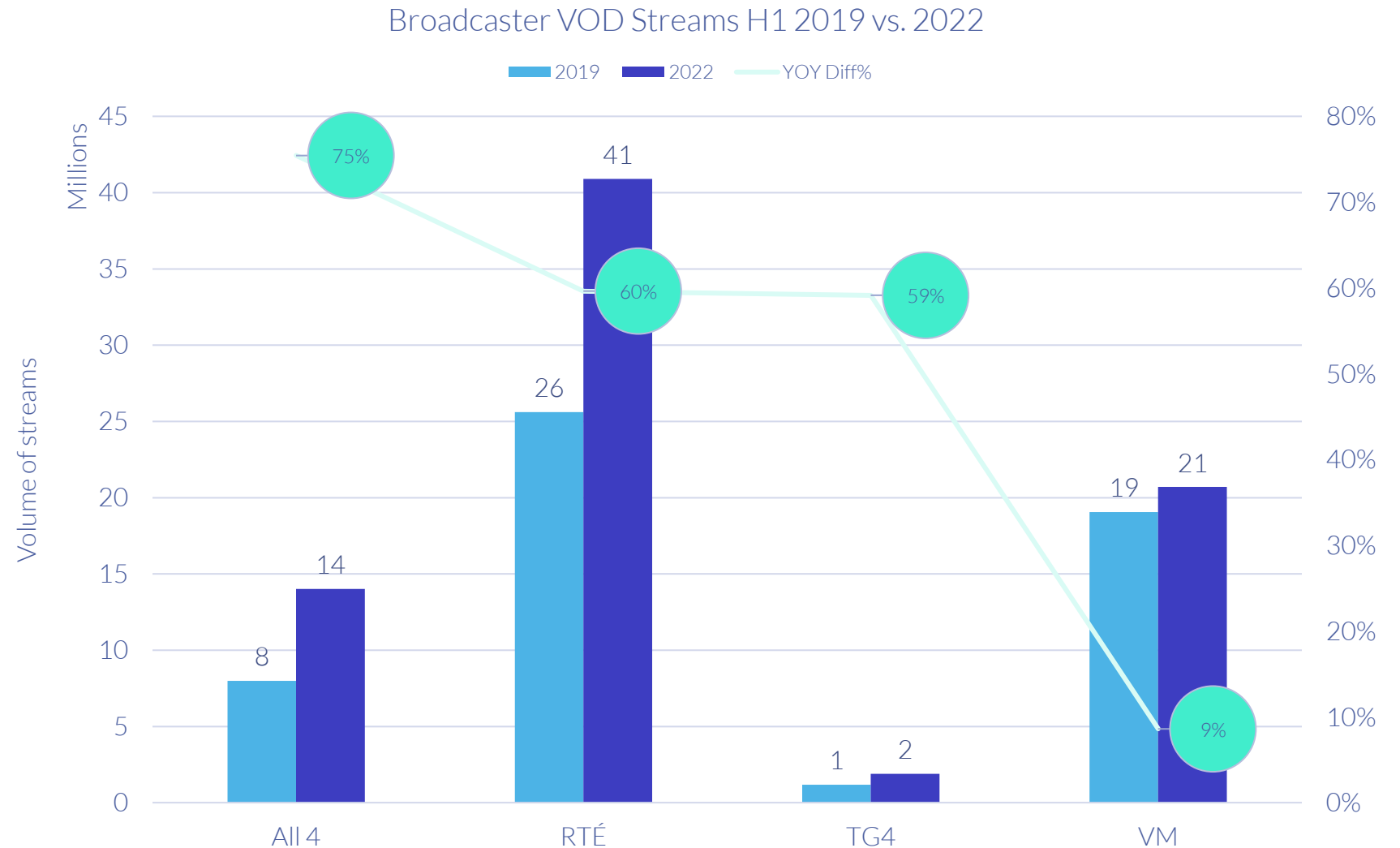
Broadcaster VOD vs. 2019

To analyse streaming growth over the past few years, we have compared H1 2019 (pre Covid-19) vs. H1 2022.

Versus H1 2019, All 4, RTÉ and TG4 have all seen massive gains, +75%, +60% and +59% respectively.

Virgin Media has also seen an increase of +9% vs. H1 2019.

Helped by increased consumption during the pandemic, All 4, RTÉ and TG4 have successfully been able to hold onto new users, and increase their audience base.



Source: Broadcasters' data, excludes (2019) Sky On Demand

TV VOD streaming

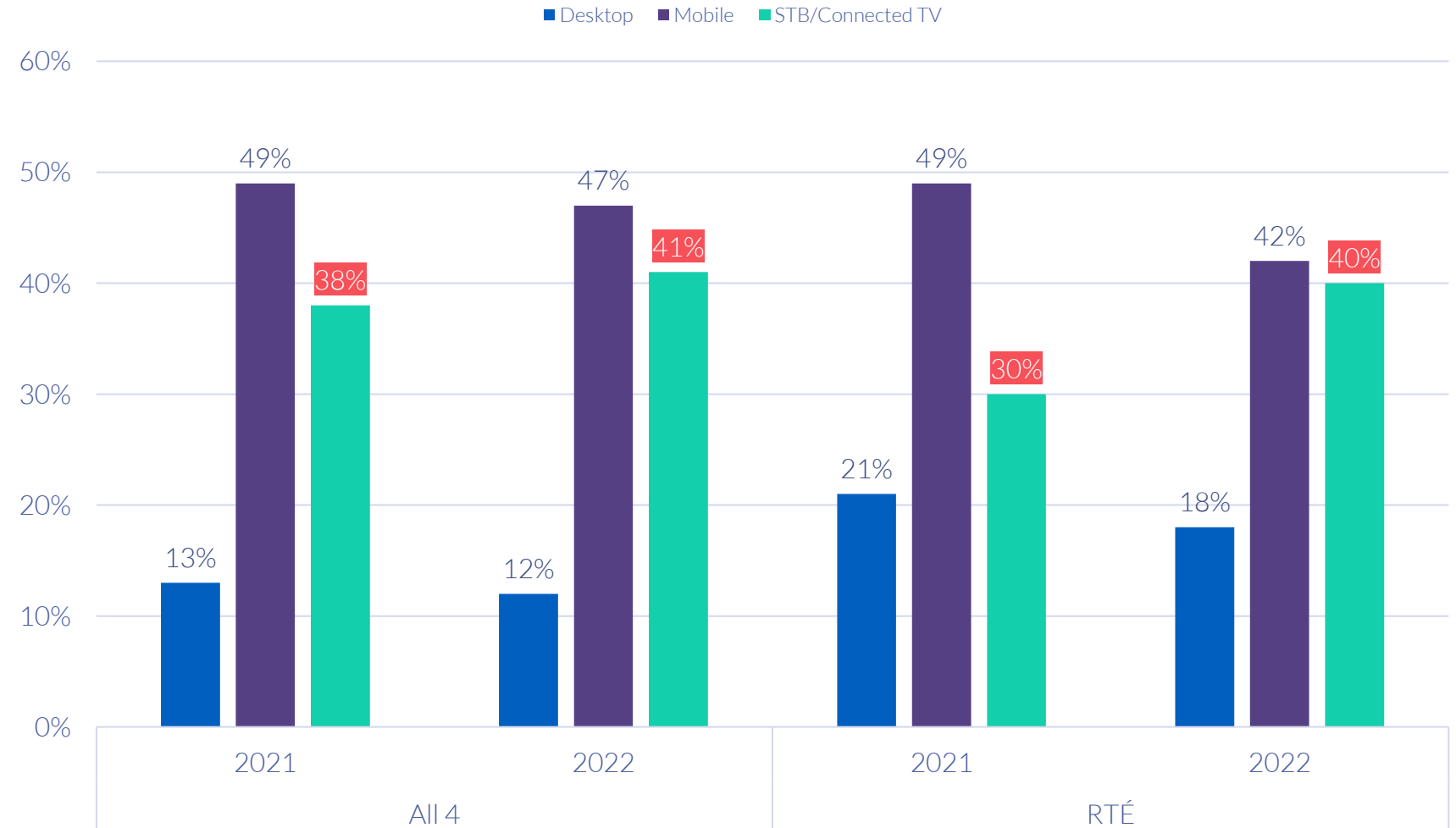
One of the contributors to growth in streaming has been increased access, and the emergence of TV VOD Apps, typically played on a Smart TV, Amazon Fire, Google Chromecast, or Apple TV device.

Streaming on a TV continues to rise in 2022, with more than 40% of (certain) broadcast player streams now watched on a TV screen.

All 4 and RTÉ have again seen the biggest growth in this space.

Based on research, previously conducted in the UK by Channel 4 and ITV (Project Firefly), on average 1.6 viewers per stream consume broadcast player content on a connected TV screen.

Broadcast VOD Streams (%) by Device H1 2021 vs. 2022



Source: Broadcasters' data

Top 10 Broadcaster VOD programmes

Unsurprisingly Love Island was the most streamed programme in H1.

All 4 reported their biggest month so far this year in April, thanks to Derry Girls and Married at First Sight Australia.

Drama dominates the Top 10 programmes on RTÉ Player, with season 2 of 'Smother' reporting over 650k streams, and 'Normal People', which aired in 2020, remaining extremely popular.

'The Staircase', which aired in May, was by far the most popular programme on Sky On Demand, with over 800k streams.

Top 10 Streamed Programmes Jan - Jun 2022

RTÉ Player	All 4	Virgin Media Player	Sky On Demand
Home and Away	Married at First Sight Australia	Love Island	The Staircase
Eastenders	Derry Girls	Emmerdale	Euphoria
Fair City	Frasier	Coronation Street	Below Deck
Nine O'Clock News	Gogglebox	Ireland AM	Succession
Six One News	Made in Chelsea	Love Island: Unseen Bits	Harlan Coben's The Five
Neighbours	Hollyoaks	Britain's Got Talent	The Flight Attendant
Normal People	Taskmaster	The Bay	A Discovery Of Witches
The Tommy Tiernan Show	Celebs go Dating	Redemption	We Own This City S1
First Dates Ireland	Four in a Bed	Our House	The Sopranos
Smother	The Inbetweeners	The Holiday	Peacemaker

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

News Media

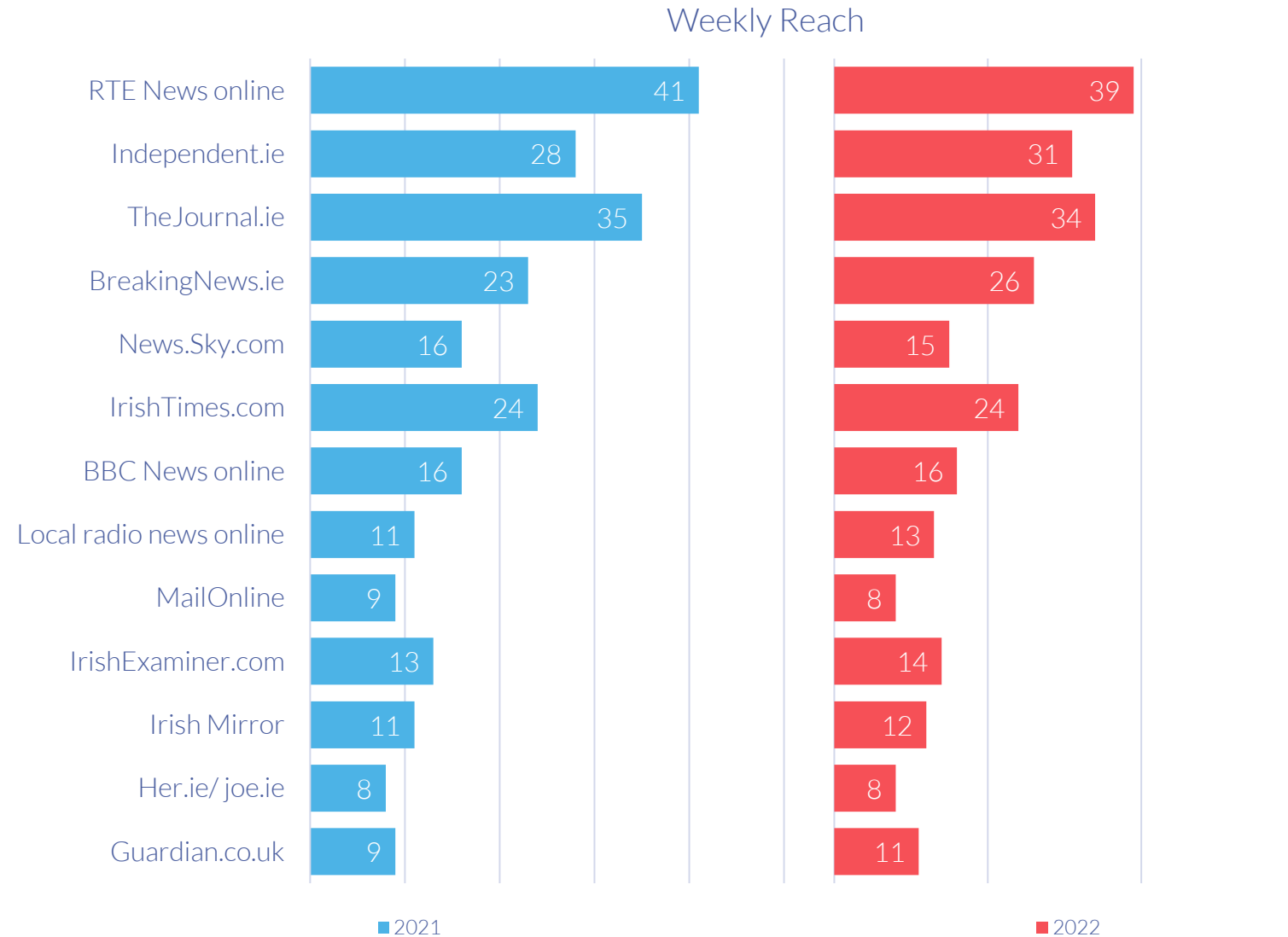
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Reuters Digital News Report

Released annually, this years Reuters Institute Digital News Report, shows that RTÉ, TheJournal.ie, and Independent.ie are once again the most frequently accessed sources of news online.

Having relaxed its subscription model, and reduced the number of premium articles, Independent.ie has seen the biggest gain year-on-year, increasing their reach by +3%.

While Breakingnews.ie has now overtaken IrishTimes.com for weekly reach.

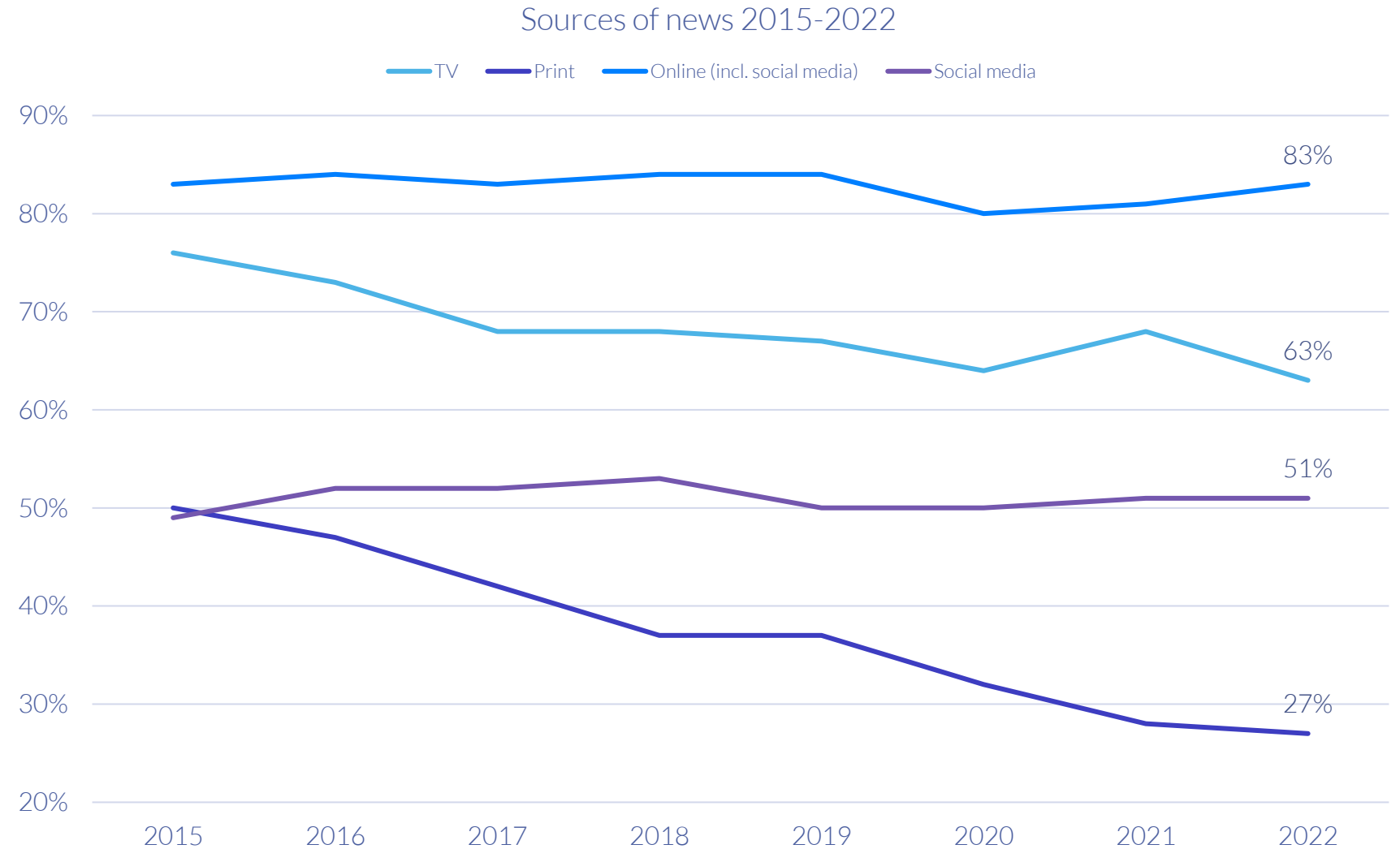


Sources of news

Use of traditional media such as print and television as a source of news have fallen significantly since 2015, with younger people getting much of their news online or via social media.

Television saw the biggest drop year-on-year, with no Covid-19 restrictions a contributory factor versus 2021.

Similar to last year, the report also highlighted that almost three-quarters (72%) of Irish people access news weekly via a smartphone.



Subscription to news

Similar to 2021, 16% of Irish people are now paying for news subscriptions, a figure which has remained flat year-on-year, but as a nation we are more willing than our EU (15%) or UK (8%) counterparts to pay for news.

These numbers will however come under pressure, due to the cost of living crisis we currently face, and squeeze on peoples spending power.

The report also found that 46% of Irish people listened to a podcast in the last month, an increase of +5% year-on-year.

Since 2018, people listening to podcasts in Ireland, has seen a meteoric rise.

16%

Pay for online news

flat year-on-year

46%

Listened to a podcast in the last month

+5% vs. 2021

52%

Trust in news overall

flat year-on-year

Social & Search

Online conversation and searches were dominated by the tragic murder of Aisling Murphy in January.

The war in Ukraine was a major talking point in February and March.

Numerous sporting events dominated both social and search activity throughout the first six months of the year.

Conversation on Social

The tragic murder of Ashling Murphy was the biggest conversation on social media in January, followed by an end to covid restrictions, and Neil Youngs' removal from Spotify.

Russia's invasion of Ukraine was a major talking point in February and March, as people showed their ongoing support and solidarity with the people of Ukraine.

Sporting events were also strongly discussed in H1, thanks to Afcon 2021, Super Bowl, Six Nations rugby and the Champions League.

While June ended with increased conversation around Love Island and Pride 2022.

Social media conversation (Ireland) – Jan to Jun 2022

Jan	Feb	Mar
Ashling Murphy	Ukraine	St Patricks Day
#SheWasGoingForARun	Putin	Stand With Ukraine
Apr	May	Jun
April Fools	2022 UEFA Champions League Final	Love Island
Climb with Charlie	Liverpool	Pride 2022

Top Searches per month

Similar to conversations on Social, Ashling Murphy, Ukraine and numerous sporting events including Cheltenham, the 2022 Masters and the Champions League final dominated searches in H1.

The Johnny Depp v Amber Heard trial was the 2nd most popular search in April and May.

Top Searches (Ireland) – Jan to Jun 2022

Jan	Feb	Mar
Wordle	Ukraine War	Will Smith
Ashling Murphy	Putin/Russia	Cheltenham
Apr	May	Jun
2022 Masters	Champions League Final	Fathers Day
Amber Heard/Johnny Depp	Amber Heard/Johnny Depp	Ireland v Scotland

Audio

Nearly four in five adults, or close to 3.2m people, listen to radio every weekday, according to the latest JNLR/Ipsos radio listenership report covering the 12 months to the end of June.

Joint National Listenership Research (JNLR)

Nearly four in five adults, or close to 3.2m people, listen to radio every weekday, according to the latest JNLR/Ipsos radio listenership report covering the 12 months to the end of June.

Under a third of adult listeners tune into an RTÉ Radio station with RTÉ Radio 1 the most popular (21.3%), ahead of RTÉ 2FM (5.8%) and RTÉ Lyric FM (2.4%). Bauer's Today FM (9.1%) and Newstalk (7.2%) were the second and third most popular national stations.

3.2m

People listen to radio every
weekday

Slight decline of -0.9%

51.6%

Listened to a local or regional
station

Slight decline of -0.7%

43.4%

Listened to a national station

Slight decline of -0.1%

Cinema

Over 5.3m people visited the cinema between January and June.

Top Gun: Maverick was the number one movie in the box office taking in €5.025 million in revenue., followed by The Batman with €4.4 million in revenue.

Cinema admissions

June was the busiest month of the year for admissions so far, with 1,031,845 people attending the cinema nationwide.

This was an increase of 20% month-on-month, and a 76% increase year-on-year.

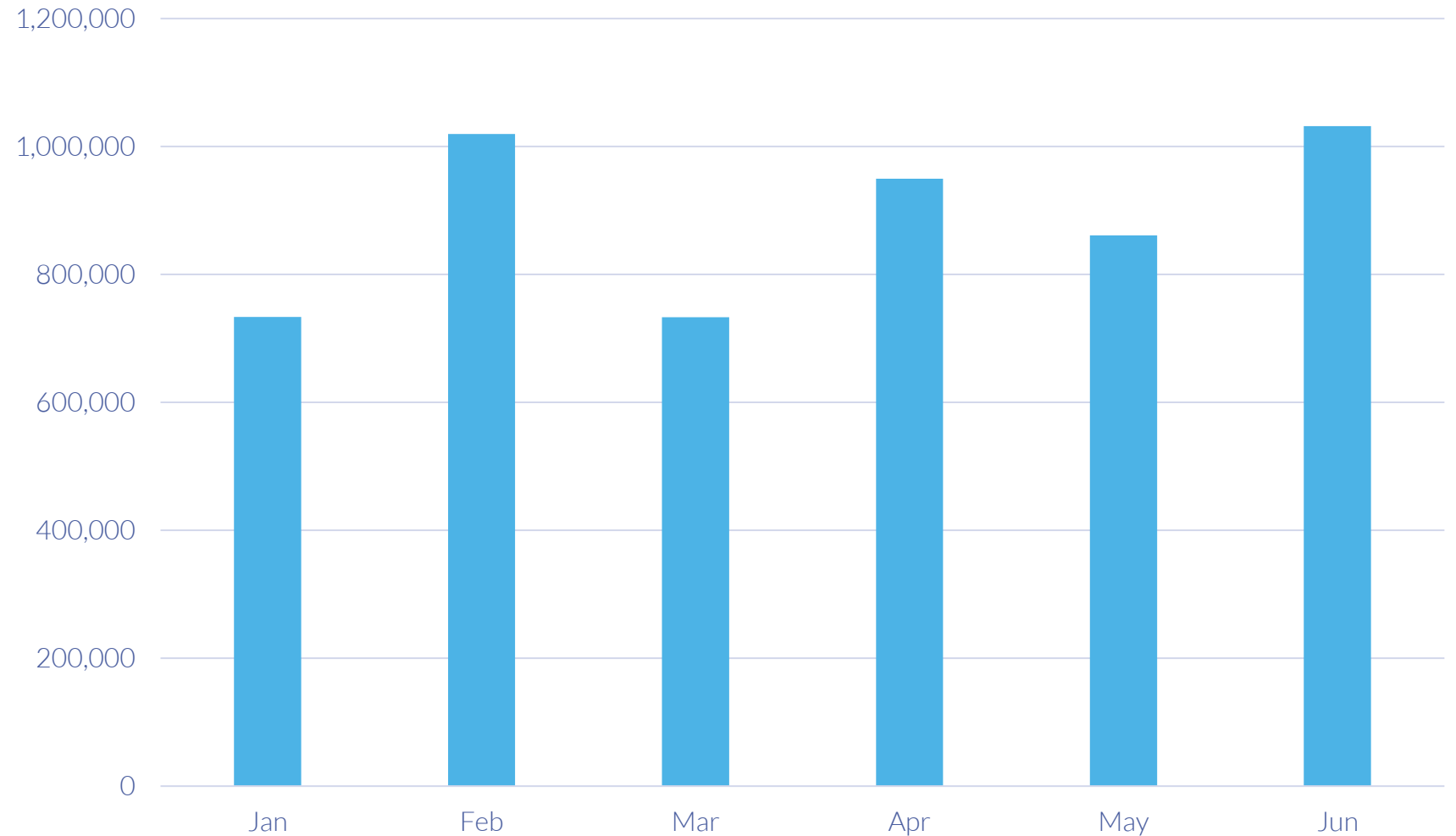
This upward trend continued into July, with almost 400,000 people attending the cinema in the first week.

This trend coincided with the release of Thor: Love & Thunder and Minions: The Rise of Gru.

Minions managed to break over €1million on its opening weekend in ROI as #Gentleminions trended across social media.

Overall, admissions are now 25% below pre-Covid levels (H1 2019), which was a record breaking year for box office takings.

Cinema Admissions H1 2022



Top 10 Films

Top Gun: Maverick tops the Film charts up to the 17th July, with receipts totalling just above €5 million. The movie is restricted to cinemas for 120 days versus the average duration of 45 days.

The Batman comes in a close second with receipts of €4.4 million since its release in early March.

Top 10 Films (Ireland) – Jan - Jun 2022

Film	Box Office
Top Gun: Maverick	€ 5,025,817
The Batman	€ 4,399,769
Sing 2	€ 3,451,337
Doctor Strange In The Multiverse Of Madness	€ 3,272,842
Spider-Man: No Way Home	€ 2,991,091
Jurassic World: Dominion	€ 2,681,507
Sonic The Hedgehog 2	€ 2,634,469
Minions: The Rise Of Gru	€ 2,568,270
Uncharted	€ 2,554,008
Belfast	€ 2,309,488



Upcoming Movies



Bullet Train
5/8/22



Nope
12/8/22



Beast
26/8/22



The Invitation
26/8/22



The Forgiveness
2/9/22



Three Thousand Years of Longing
2/9/22



See How They Run
9/9/22



Ticket to Paradise
16/9/22

OOH

In April and May, the volume of people in retail and hospitality returned to pre-pandemic levels, and there is also a continued growth and interest in the great outdoors.

Community Mobility Report

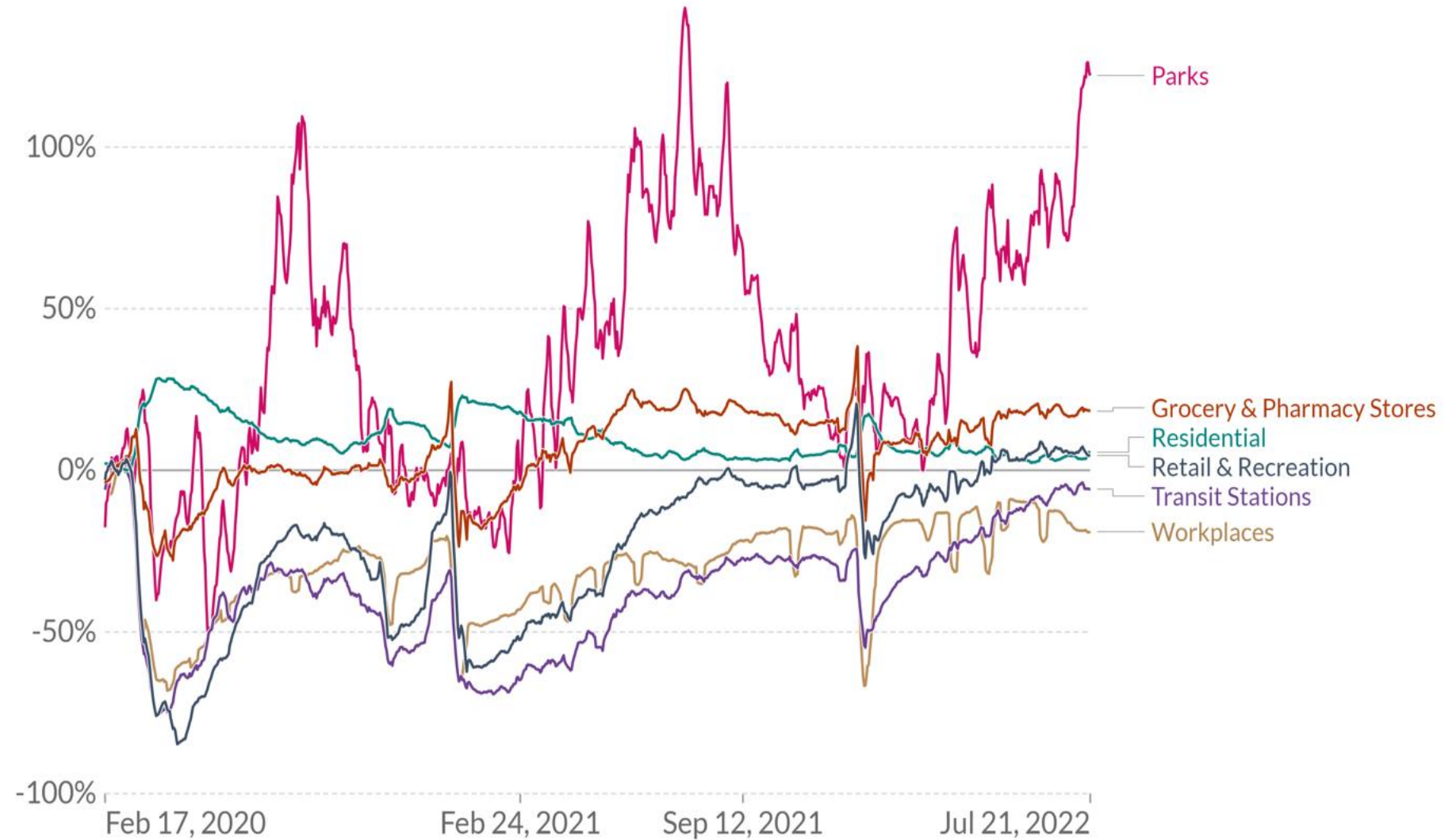
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Parks +121.57%

Grocery and Pharmacy Stores +18.71%

Retail and Recreation +5.43%

Residential +3.57%



Mobility in Dublin since the start of the year

The Central Statistics Office (CSO) has published its latest Transport Bulletin which is compiled using data collected by Transport Infrastructure Ireland, the Road Safety Authority, the National Transport Authority, Dublin City Council, the Office of the Revenue Commissioners and the Department of Transport.

Car traffic volumes in Dublin increased by 34% compared with week 1. Bus, Rail & Luas journeys follow a similar trend.



Since 2021

+9%

Since 2022

+34%



+67%

+86%



+81%

+130%



+90%

+113%

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

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