

# COVID-19 MEDIA CONSUMPTION

12<sup>th</sup> March – 13<sup>th</sup> May



# Executive Summary

Increased mobility and a general desire to get back to normal has resulted in media consumption settling after the initial lockdown peak.

**As people become more adjusted to their lives in lockdown, their media consumption is returning to pre-Covid levels.** TV consumption, while still up 4% overall year-on-year, has begun to normalise since its peak growth of 21% in the first week of April. We are also seeing fluctuating viewing patterns for younger audiences as programming schedules evolve.

**Viewership of The Nine O'Clock News, while still performing strongly, has reverted to more typical viewing levels as newsworthiness of the crisis wanes.** That said, RTÉ viewership has grown significantly and now commands a 43% share of viewing in the latest four week period. This comes as RTÉ premiered **Normal People**, which has been a significant win across broadcast and VOD platforms.

**Viewership to catch-up services has seen significant growth throughout the lockdown period and is delivering volumes in excess of pre-Covid levels (+30%).** This is the case for all broadcast players with the exception of Virgin Media, which has seen a decline in audience of 57% since the lockdown began. This is driven by people seeking out new and original content to consume across other catch-up services.

**Less hunger for news is also starting to impact both printed and online news media channels.** Weekday circulations of newspapers remain under pressure and continue to decline by up to -10% year-on-year. This is in contrast to growth that is being seen across most national newspapers at the weekend where circulations have increased by between +2% and +7% year-on-year. At the same time, we are seeing double the normal monthly page impressions for all major news sites, these numbers are beginning to reduce month-on-month – a trend to watch in the coming weeks.

**Our new quarantine routines have caused a shift in our news consumption.** Without the morning commute, we are waking later and, as a result, our news consumption has shifted to a later pattern, with a significant increase in consumption in the evening.

Unfortunately, we have seen our first high-profile media owner close during the Covid crisis with the announcement that the **Northside and Southside People** have gone after 33 years of publishing.

**Search terms have significantly shifted away from Covid-19 and are now much more heavily focused on events such as Pieta House's *Darkness into Light* appeal.** UFC results are also popular, suggesting people are eager to find alternative content. Our lockdown searches also reflect the growing trend for inspiration, as people try to cut their own hair, make their own cocktails and learn to cook.

Similarly, April saw the lowest number of coronavirus mentions in social media since the pandemic began. Mental and physical health are two of the most talked about topics this month, as government initiatives around health, as well as *Darkness into Light*, drive conversation.

**The surge of podcast content continues, as broadcasters, such as Louis Theroux, have made their first foray into the audio world.** His podcast (now in its third week) is the most listened to in Ireland.

**There is an increase in the journeys that people are taking during lockdown. Apple's mobility data shows an increase in travel in recent days across all regions, although journeys are still less than 50% of pre-covid levels.** In the coming weeks, as lockdown measures ease, media that have been starved of audience (e.g., Out-of-Home) will see the return of some demand.

A young man with curly hair and a young woman with blonde hair are shown in profile, looking out over a landscape. The man is on the left, and the woman is on the right, leaning her head against his shoulder. The background is a soft-focus outdoor scene with a cloudy sky.

# TV

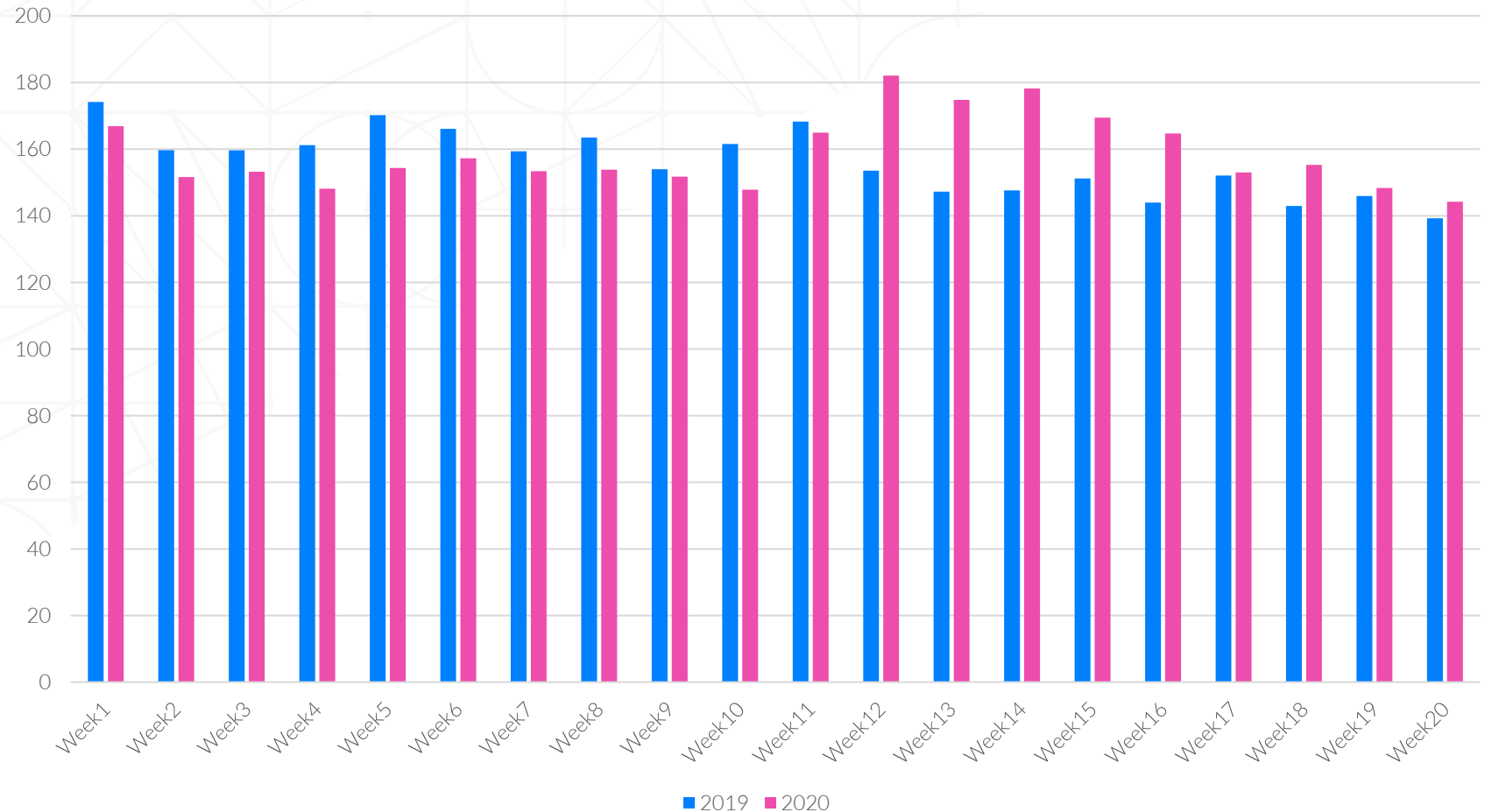
TV continues to grow year-on-year. News is starting to normalise, while new drama *Normal People* was viewed by 371,000 adults in the first week of transmission with an additional 1 million streams on the RTE Player.

# Television- All adults:

Viewing levels have slowed from year-on-year growth of 21% (at the beginning of lockdown) to 4% in the latest week.

On average, adults are now viewing 2 hours and 24 minutes of TV content every day. This has dropped from a peak of 3 hours at the start of the lockdown.

Minutes Viewed per Day  
All Adults

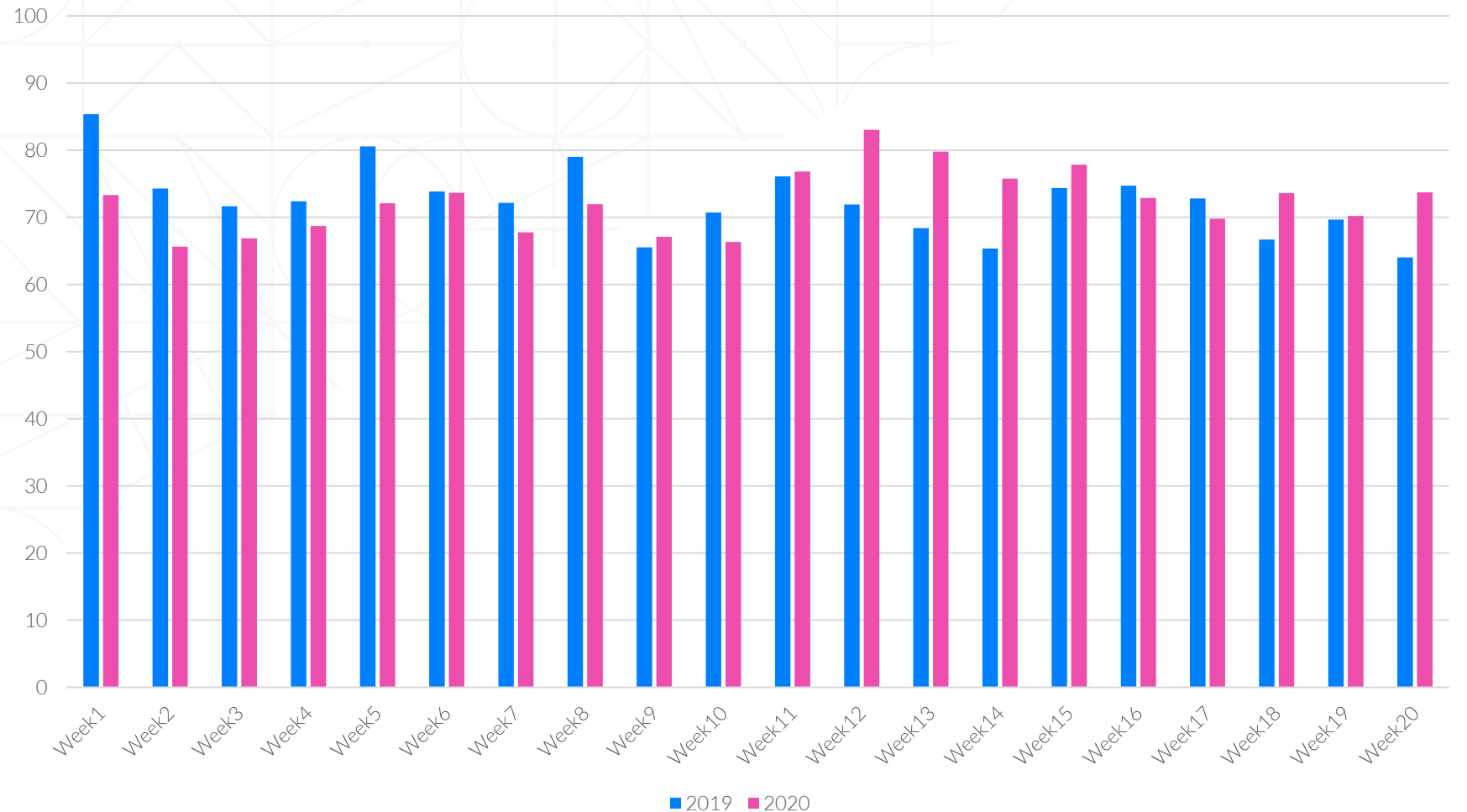


# Television – 15-34 adults:

Viewership for adults aged 15-34 is quite inconsistent week-on-week.

Last week, we saw an increase of 15% year-on-year; however, over the last four weeks, this increase is a more modest 5%.

Minutes Viewed per Day  
15-34 Adults

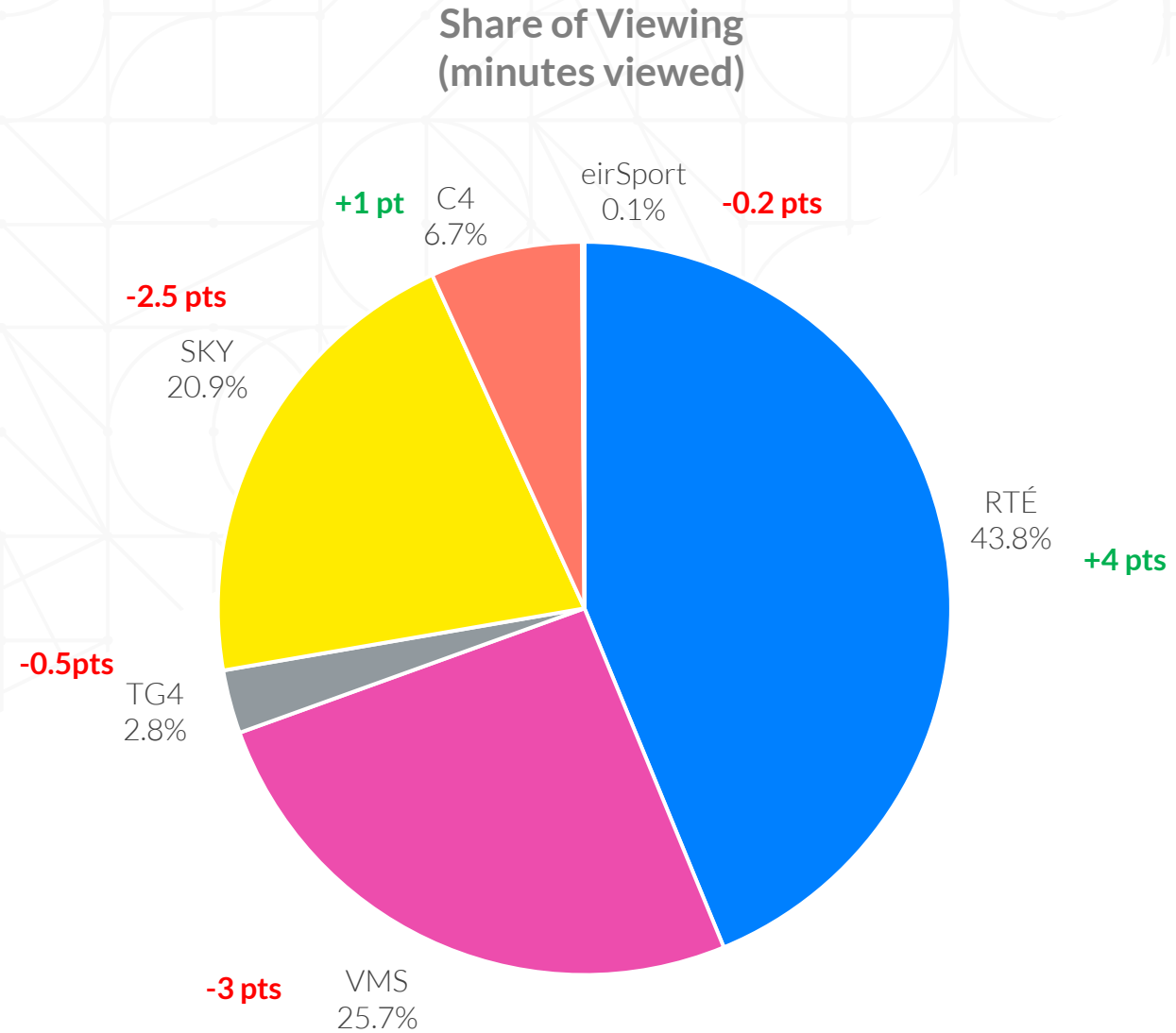


Source: Nielsen – adults 15-34 viewership

# Television share of viewing:

RTÉ continues to maintain significant share growth during the Covid-19 lockdown.

Channel 4 also continues to see a significant percentage increase in share of viewing. This growth is mainly in light entertainment shows during daytime, in particular.

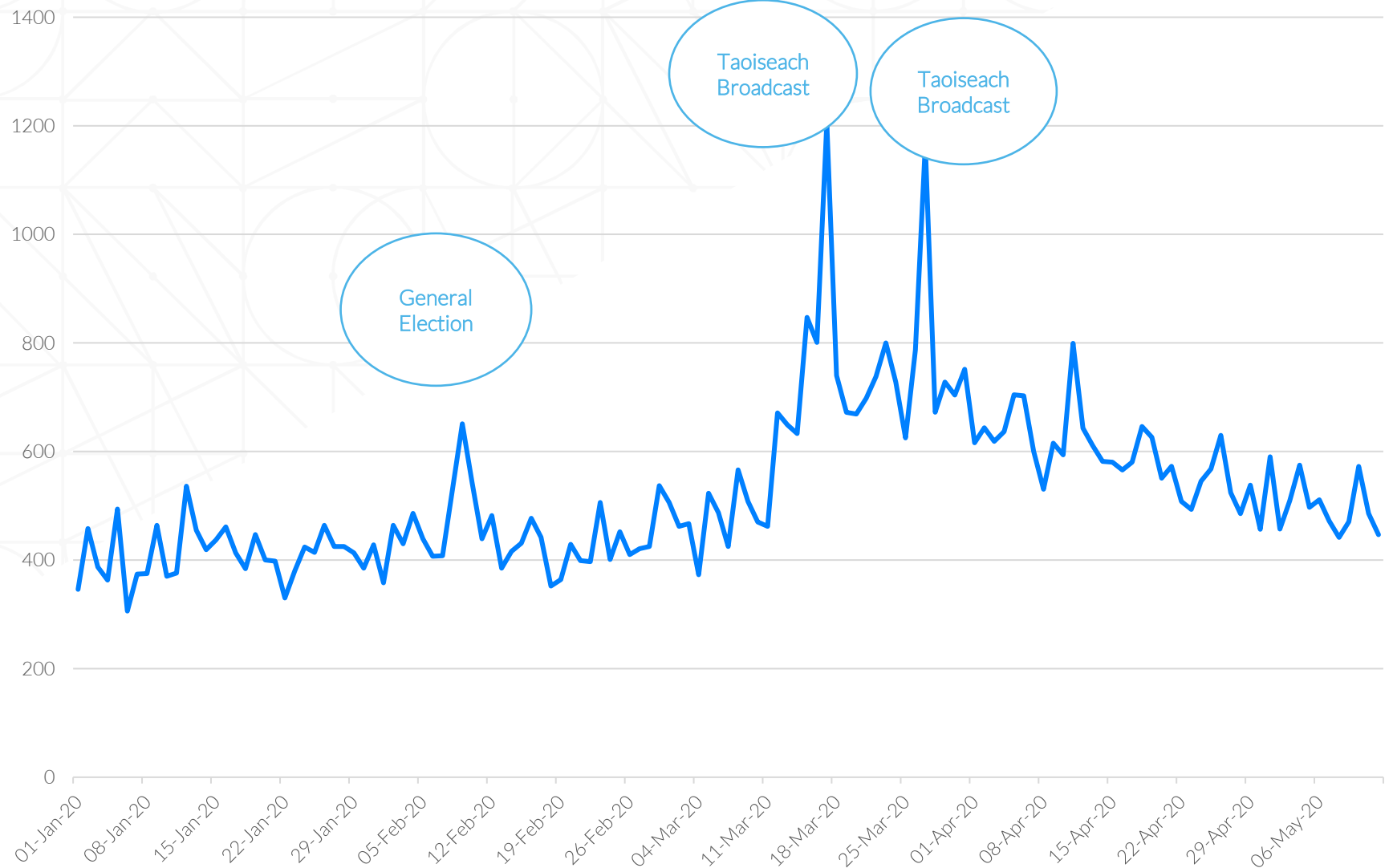


# RTÉ Nine O'Clock News viewership has settled:

Initially, viewership grew by 200% versus pre-Covid times.

This has changed significantly in recent weeks, and is now averaging +13% versus the pre-Covid period.

### Viewership of Nine O'Clock News on RTÉ1



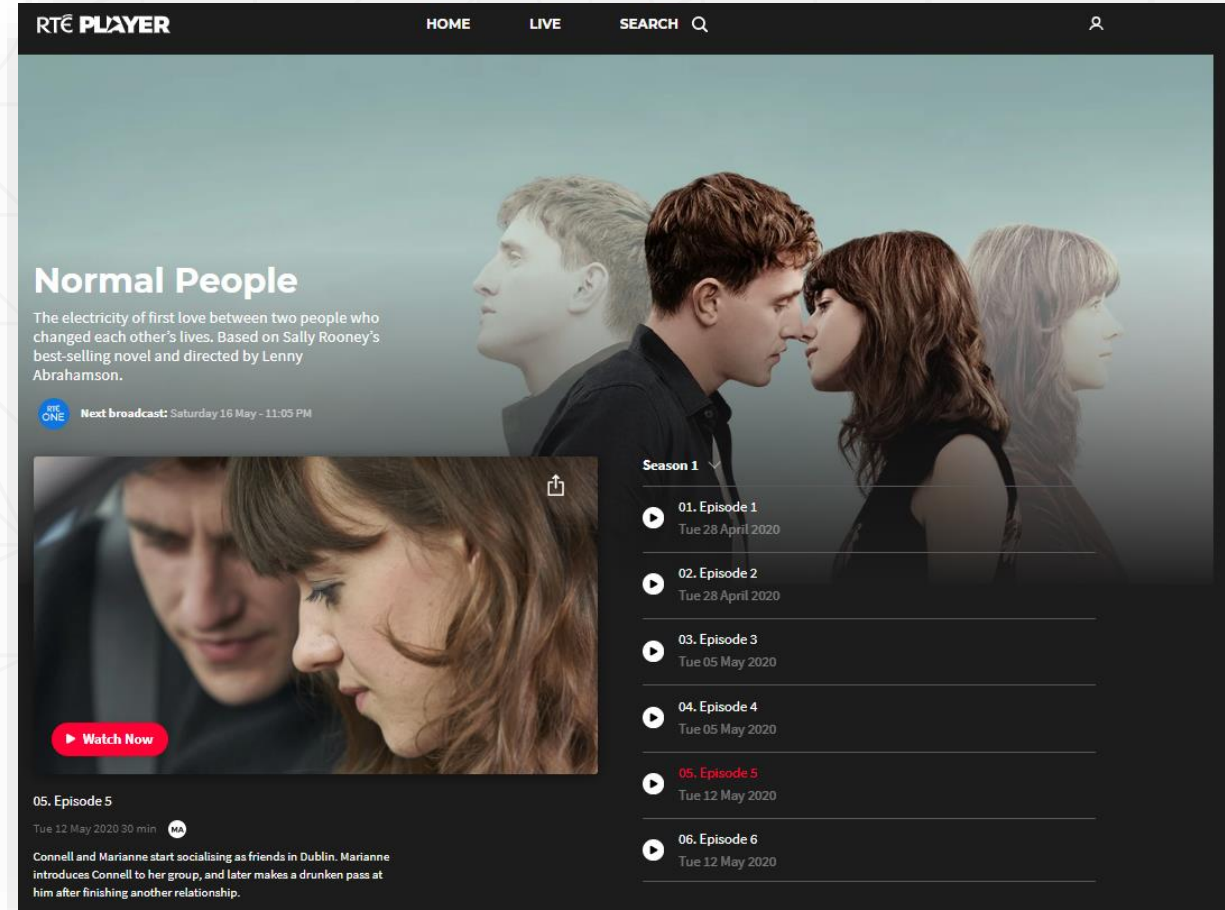
Source: Nielsen – All adult viewership (000's)

# Normal People:

Normal People has been a big success for RTÉ.

Currently, it averages 371,000 viewers on RTÉ 1 with an additional 19,000 on RTE +1.

It's the most watched opening of a drama series ever on the RTÉ Player with >1million streams to date.



RTÉ PLAYER HOME LIVE SEARCH Q

## Normal People

The electricity of first love between two people who changed each other's lives. Based on Sally Rooney's best-selling novel and directed by Lenny Abrahamson.

Next broadcast: Saturday 16 May - 11:05 PM

Season 1

- 01. Episode 1  
Tue 28 April 2020
- 02. Episode 2  
Tue 28 April 2020
- 03. Episode 3  
Tue 05 May 2020
- 04. Episode 4  
Tue 05 May 2020
- 05. Episode 5  
Tue 12 May 2020
- 06. Episode 6  
Tue 12 May 2020

05. Episode 5  
Tue 12 May 2020 30 min

Connell and Marianne start socialising as friends in Dublin. Marianne introduces Connell to her group, and later makes a drunken pass at him after finishing another relationship.

> 1 Million streams on RTÉ player to date



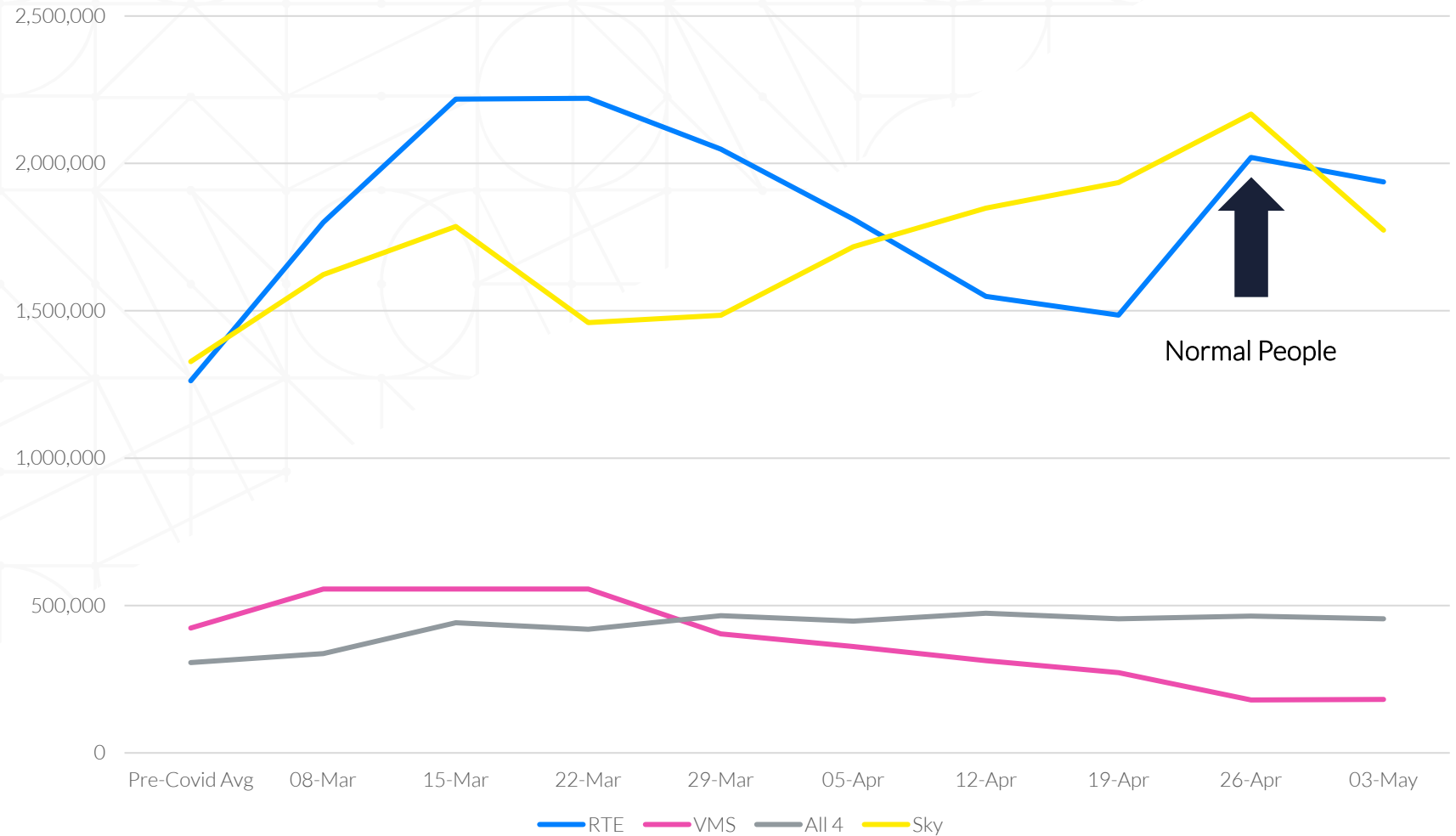
# Television streaming:

Viewing over the past 2 weeks has increased again for RTÉ; +30% vs. pre-lockdown averages.

Normal People accounts for circa 15% of weekly RTÉ Player streams.

VMS is the only broadcaster not to see growth in streams during lockdown (-57% vs. pre-Covid average).

Broadcast VOD Streams per Week



Source: Publishers' data

## Top 10 Streamed Programmes (May 2020 month-to-date)

### Top 10 streamed programmes:

New content is driving the growth in video streams on Both RTÉ and Sky channels.

Normal People has driven significant volume on RTÉ with just under one million streams.

Gangs of London and Season 2 of Brassic are delivering audience for Sky.

RTE Player	All 4	Virgin	Sky
Normal People	Scrubs	Coronation Street	Gangs of London
RTÉ News: Six One	Friday Night Dinner	Love Island 2018	Brassic 2
The Late Late Show	Gogglebox	Emmerdale	Manifest
Home and Away	Made in Chelsea	Britain's Got Talent	Code 404
RTÉ News: Nine O'Clock	Seinfeld	The Guards - Inside the K	Keeping up with the Kardashians
Love/Hate	The Inbetweeners	Ireland AM	Sex and the City
EastEnders	Celebrity SAS	Red Rock	Chicago PD
RTÉ Home School Hub	90210	Graham Norton Show	The Blacklist
The Act	Shameless	Blood	Brassic
Prime Time	Brooklyn Nine-Nine	Six O'Clock Show	The Soprano's

# YouTube trends show how users have adjusted:

YouTube gives us a good insight into what people are doing to cope as the lockdown progresses.

Home schooling, cooking and mindfulness have all seen significant growth in views year-on-year.



**Learning at home:** 50% year-on-year increase in views for “study with me”



**Getting creative with cooking:** 45% year-on-year increase in views for “pantry meals”



**Reducing stress:** 35% year-on-year increase in views for meditation related videos

The background of the image shows three newspapers hanging from a brick wall by wooden poles. The newspapers are slightly crumpled and feature various advertisements. Visible brands include Chopard, Tiffany & Co., Dior, and Salesforce. The text 'Salesforce. #1 CRM.' is repeated on two of the papers. The overall scene is set against a rustic, textured brick wall.

# News Media

Circulations of newspapers have reduced, while monthly page impressions of news sites are currently double what they were pre-Covid-19.

# News Media (print):

Sales of National newspapers are showing two trends. Weekday circulations are under pressure (up to -10% year-on-year), however Weekend sales are performing better than last year with most titles showing growth of between 2 and 7% year-on-year.

Recent *Local Ireland* research suggests that people are seeking out local news more as the lockdown progresses.

**50% of the population read local news media (print/digital)  
at least once a week**



David Ryan,  
President of Local Ireland

A study, commissioned by *Local Ireland*, reveals that the current situation has resulted in people consuming more local media than before. Research suggests that 30% of adults are reading more local printed newspapers, and 50% are reading more local news websites than they did previously.

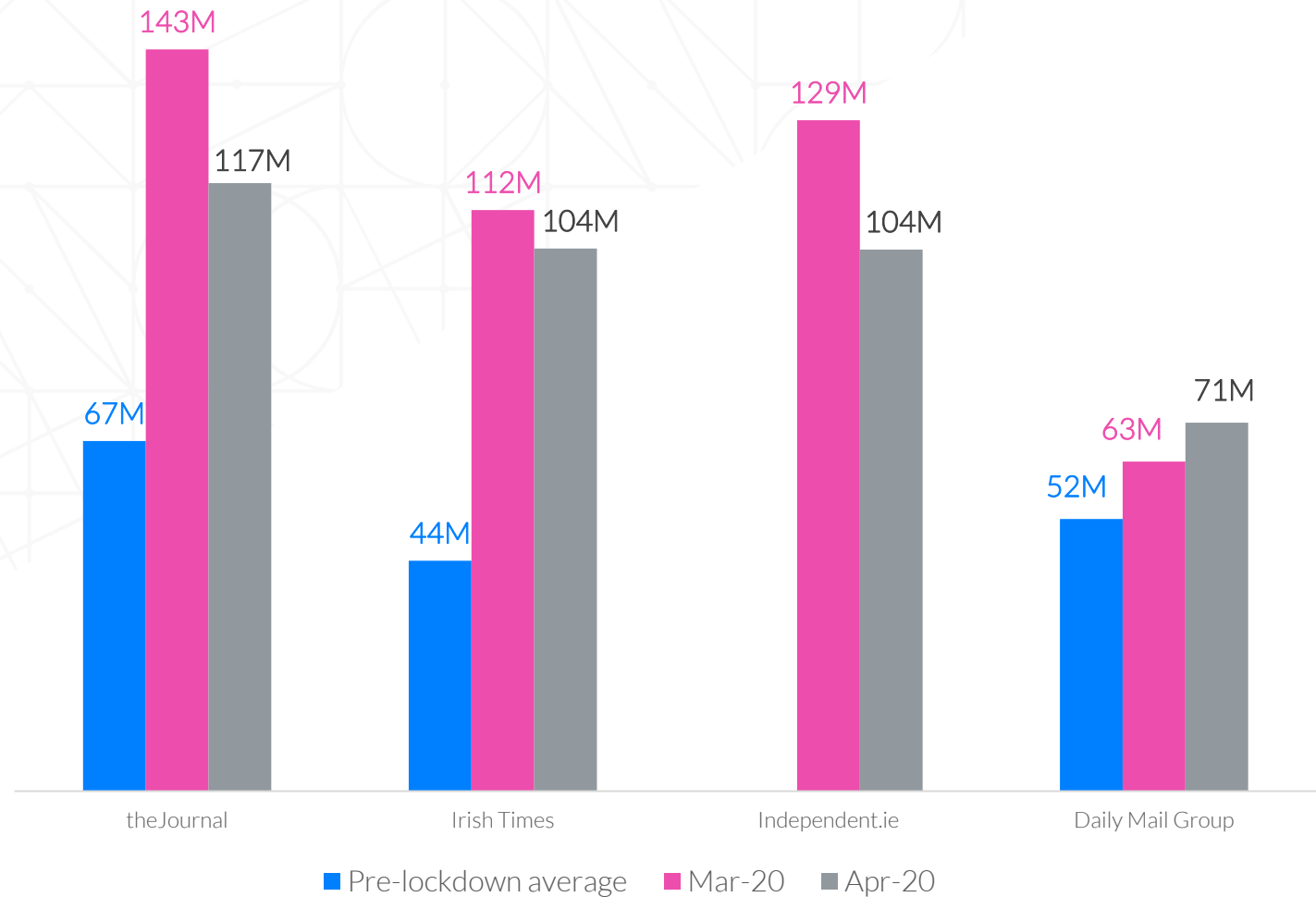
These gains, however, are in line with the initial surge in news media consumption.

# News Media (digital):

Online consumption remains high, +50% vs. pre-lockdown averages.

In recent weeks, we have seen consumption start to settle as consumers become less hungry for news content.

Monthly Page Impressions



Source: Publisher data

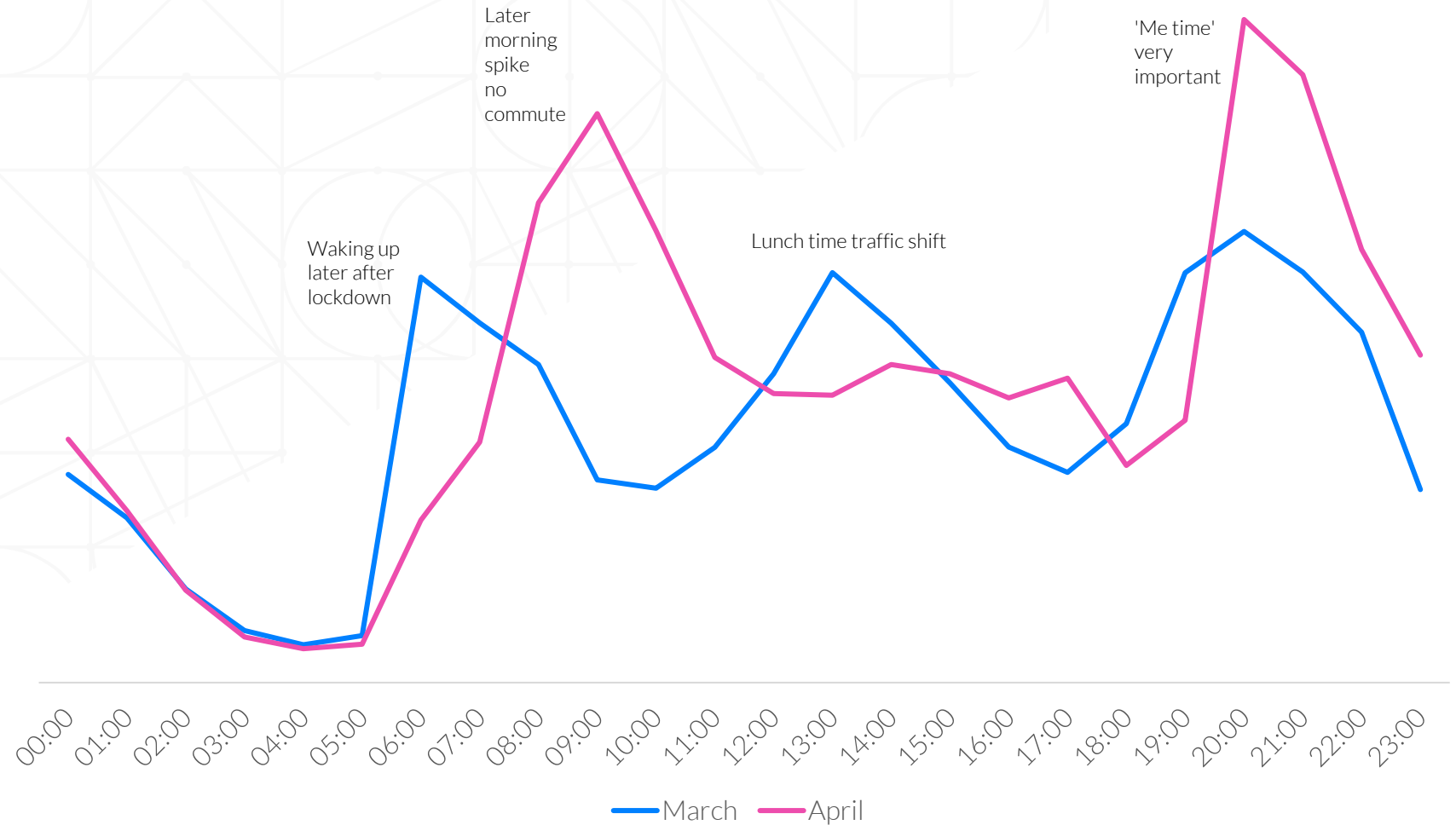
# News Media (digital):

Data from Mail Online shows an interesting shift in consumption, driven by new routines.

With people waking up later, pageview 'peaks' are about one hour later than pre-lockdown, with no lunchtime spike.

There is also a second, higher peak in the evening as readers seek entertaining content at the end of the day.

Mail Online Pageview Consumption by Hour



Source: Mail Online publisher data



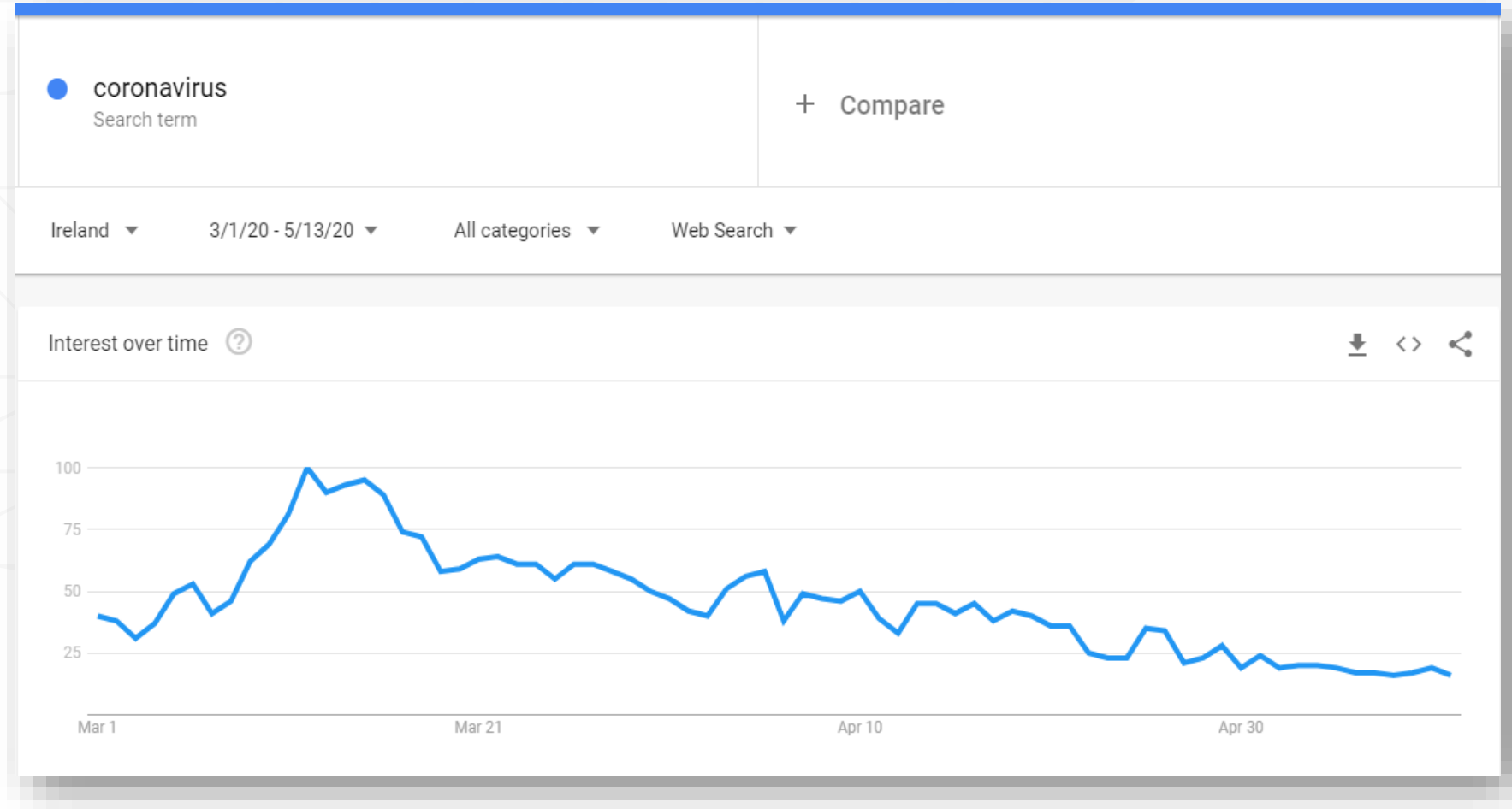
# Search & Social

Search terms continue to shift away from coronavirus and towards events (such as the UFC and Darkness into Light) and inspiration for at-home hair cuts and recipes.

Mental and physical health are the most talked about topics on social.



## Coronavirus Searches Over Time



## Coronavirus searches: people have moved on

Since the lockdown announcement, we have seen a steady decline in *coronavirus* searches with the last week seeing an even lower volume than the first week in March.

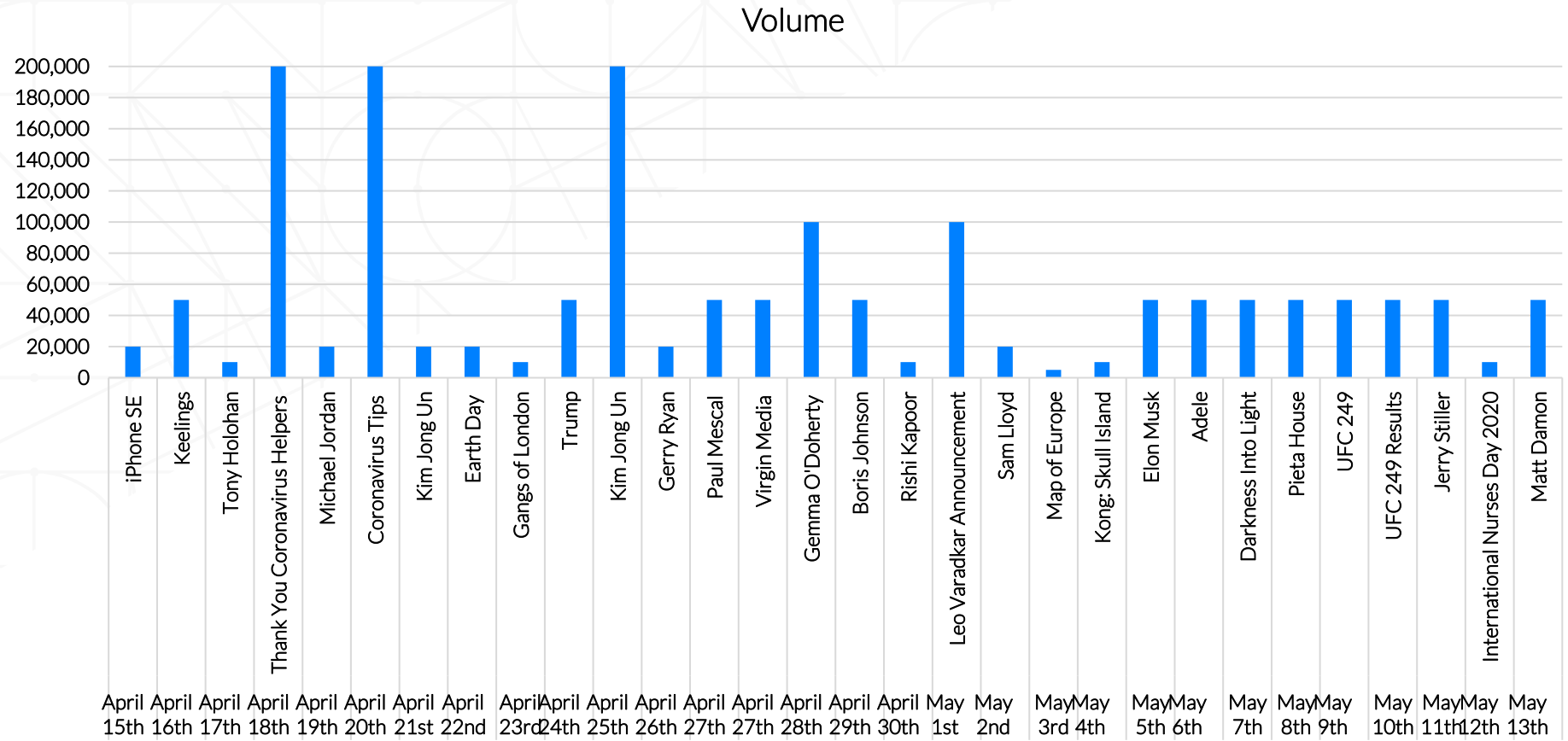
This clearly shows that people are moving on and feel they have enough information.

# Search: top searches per day

Leo Varadkar's announcement on 1<sup>st</sup> May was the highest search event in May so far, although the levels were much lower than previous announcements.

UFC results for fights that took place recently were also among the top searches, showing a significant pent-up demand for sport.

Top Searches in Ireland - April/May

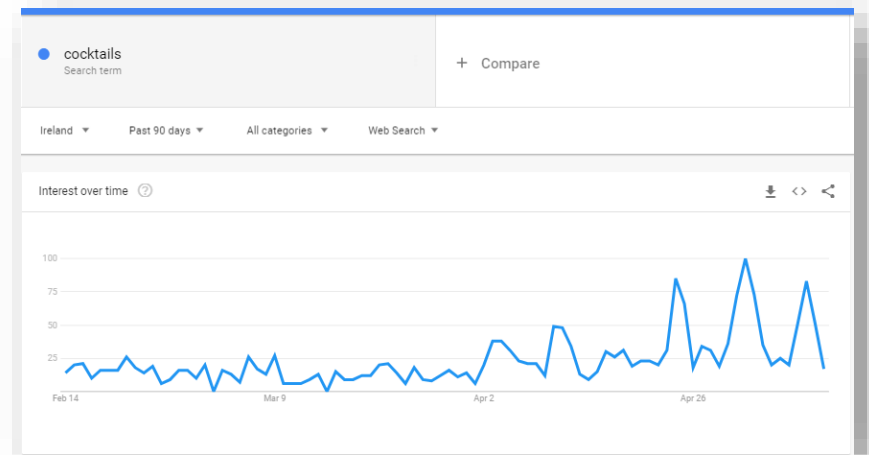
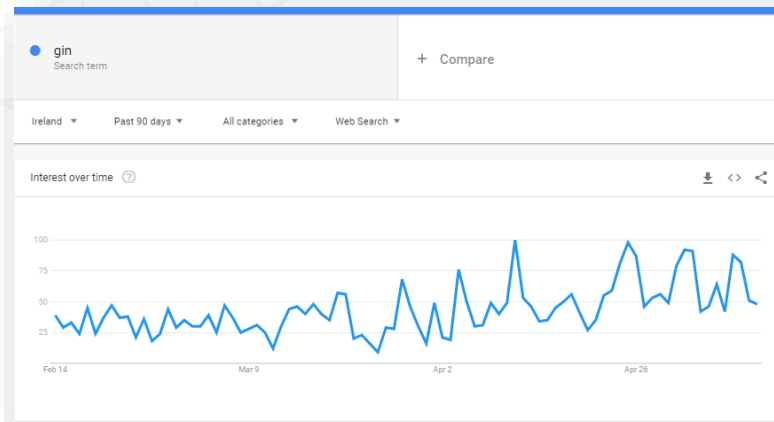
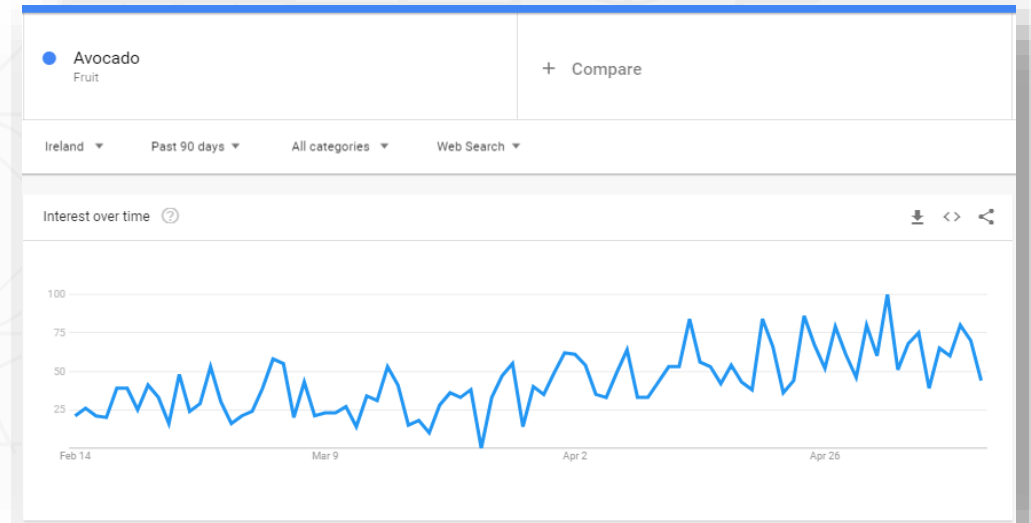
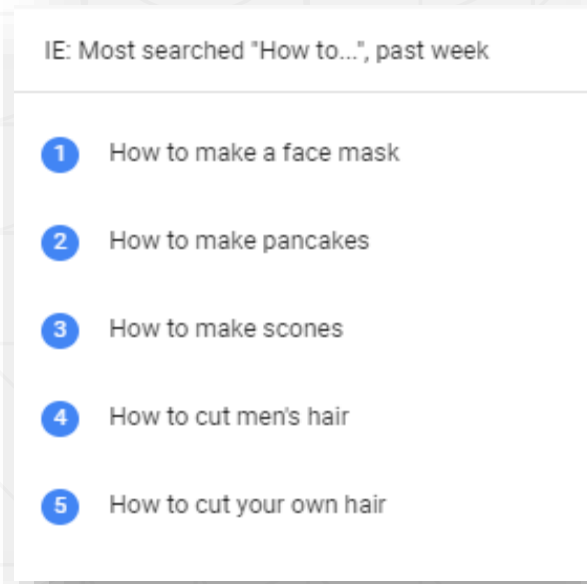


# Popular search topics during lockdown:

Google's top "how to" searches reveal beauty and recipes are top of mind for Irish people.

Searches for avocados increased in April/May with a focus on recipes.

Cocktail searches are on the increase especially at weekends, as people look for alternatives to the usual Saturday night.



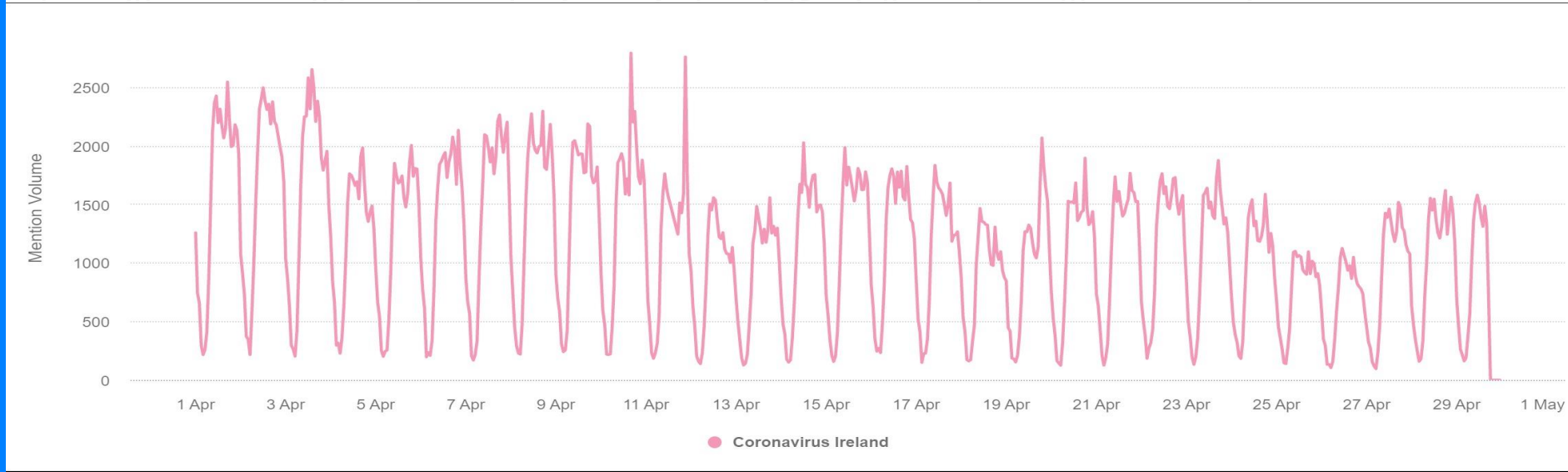
Social Media Conversation Volumes

Social mentions of Covid-19:

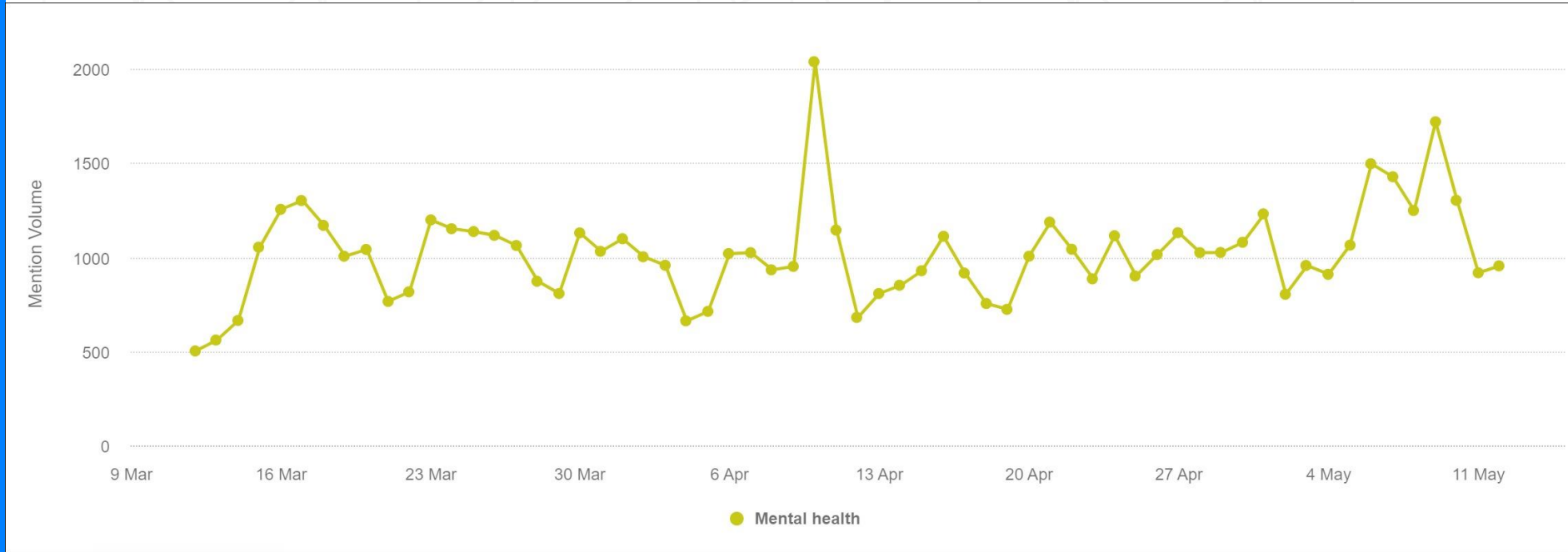
Social mentions have dropped considerably, as people are increasingly using Social as a means of coping with lockdown life.

Average daily mentions are now at 17.5k - the lowest since the crisis began.

Political events continue to drive daily spikes in conversation.



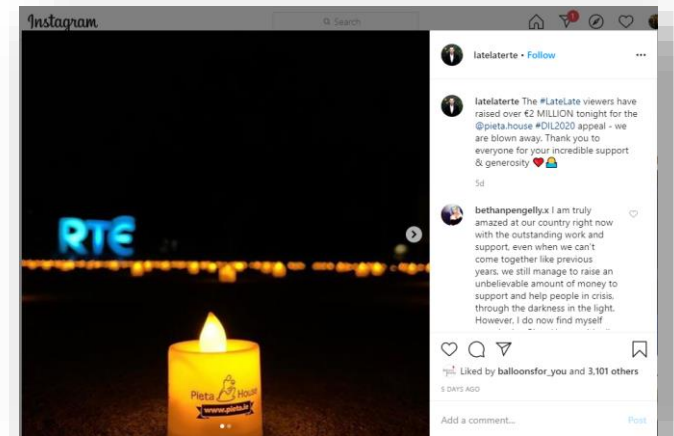
Social Media Conversation Volumes



# Mental health mentions during Covid-19:

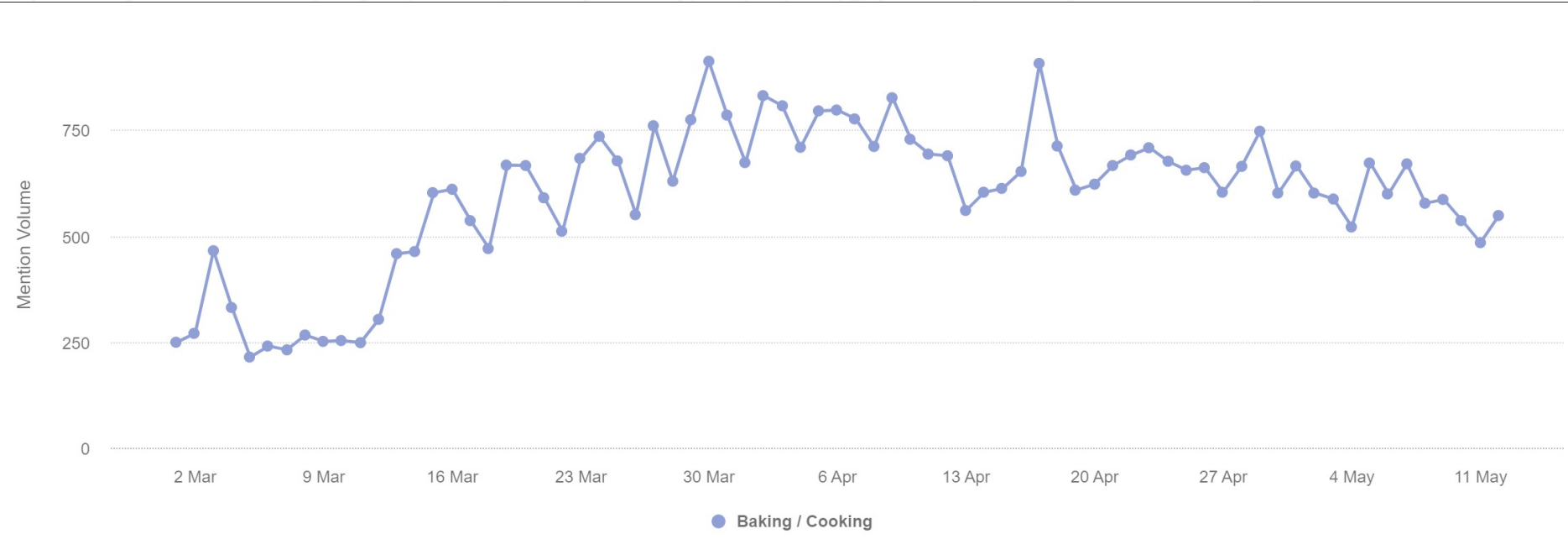
Mental health is one of the most talked about topics with an average of 1,030 daily mentions - an increase of 32% compared with Jan/Feb.

“Mental health services” and “social distancing” are the most commonly used phrases within this time period.



Source : Brandwatch

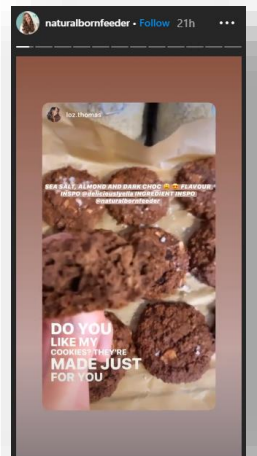
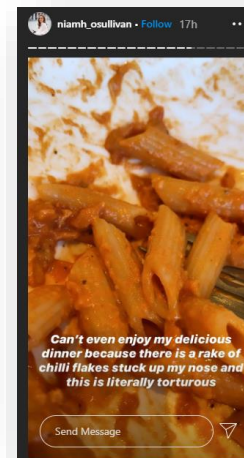
## Social Media Conversation Volumes



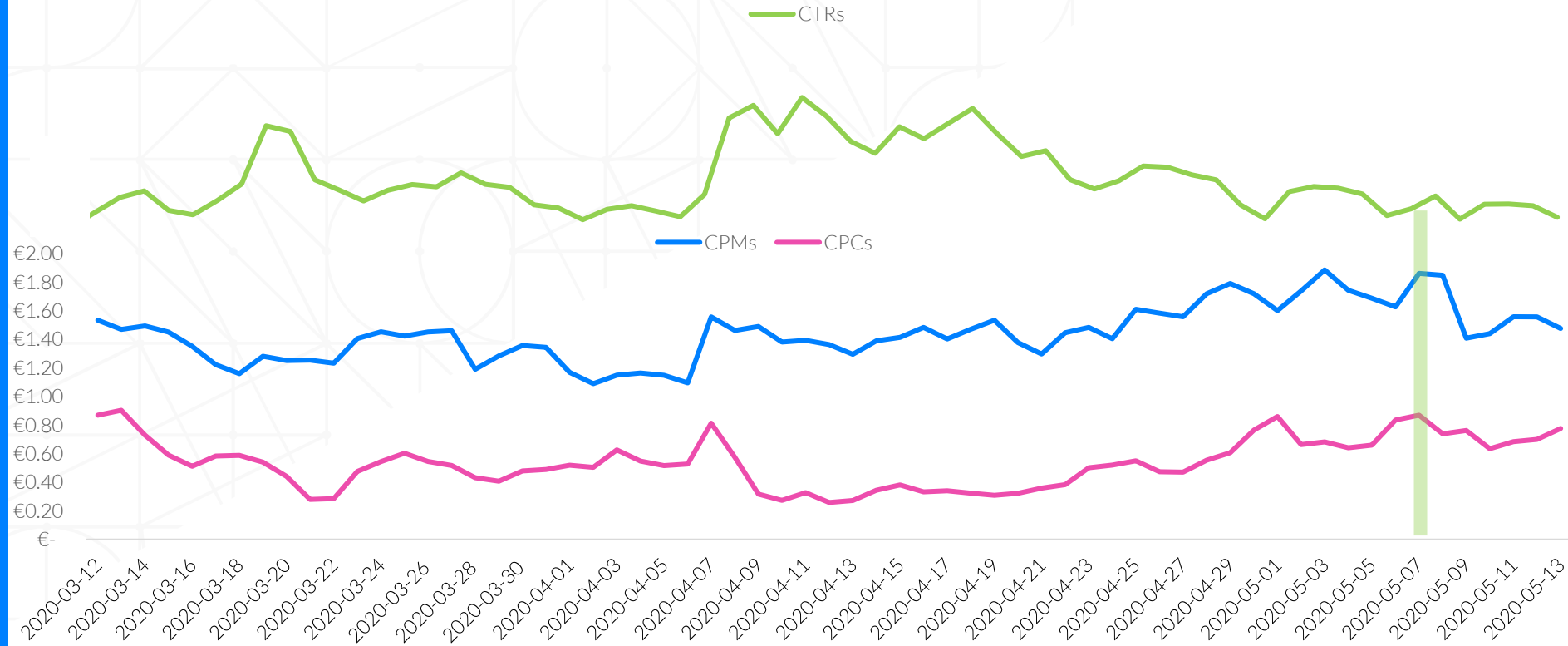
## Baking/cooking mentions during lockdown:

Daily mentions of this topic have increased by 60%, on average, compared to pre-Covid times.

“First time cooking” and “home cooking” are the most commonly used phrases.



### Daily Social KPIs



## Social advertising performance:

Costs-per-click (CPCs) have slowly increased in recent weeks, as demand increases across the social platforms, and click-through rates stabilise.

# Audio

Podcast content production is still to the fore in the audio world as broadcasters continue to move into this format.

## TABHAIR DO D'AIRE



Coronavirus  
COVID-19  
Public Health  
Advice

D'fhéadfadh sé tarlú go mbeadh orainn an geata seo a dhúnadh ag amanna i rith an lae chun smacht a choinneáil ar ghrúpaí atá rómhór. D'fhéadfaí polasaí duine isteach duine amháin a choinneáil.

### CLOSED



Coronavirus  
COVID-19  
Public Health  
Advice

Following Government Advice, the **National Botanic Gardens** is closed to Visitors until **April 12<sup>th</sup>**

### PL



OPW

This gate may need to be closed during the day at any time to control overly large crowds. At these times we may need to operate a **one-out-one-in** policy. Our apologies if this happens, but it is vital that we all comply with an Taoiseach's request on crowding.  
Thank you.



OPW



# Audio – top podcasts in Ireland:

As seen in April, there continues to be a surge in new and extra podcast content this month.

This increased content is having an impact on the number of streams per month.

Several podcasters announced record streaming numbers including Eamon Dunphy’s The Stand which delivered one million streams across April.

Louis Theroux’s foray into podcasting has proved a huge success with listeners and remains top of the podcasting charts in Ireland.

## Top Podcasts in Ireland – May

Position	Shows
1. ▶-	Grounded with Louis Theroux
2. ▶-	Irish History Podcast
3. ▶-	The Joe Rogan Experience
4. ▲1	The David McWilliams Podcast
5. ▲1	The 2 Johnnies Podcast
6. ▼2	The Stand with Eamon Dunphy
7. ▲5	Happy Place by Fearne Cotton
8. ▼2	That Peter Crouch Podcast
9. ▶-	The Daily
10. ▼1	Motive for Murder

# Cinema & OOH

A photograph of a golfer in the middle of a swing on a driving range. The golfer is wearing a grey sweater, light grey trousers, a white cap, and a white face mask. In the background, other golfers are visible, some also wearing masks. The scene is set outdoors with a green artificial turf mat and a grey building in the background.

With the ease of lockdown restrictions being announced, cinemas are set to reopen from August 10<sup>th</sup>.

Car journeys will increase as the lockdown measures are relaxed in the coming weeks.

# Cinema:

The cinema industry has been decimated due to the Covid crisis.

Cinemas are expected to reopen as part of Phase 5 on 10<sup>th</sup> August with strict social distancing procedures, deep cleans after every show and staggered start times for each movie.

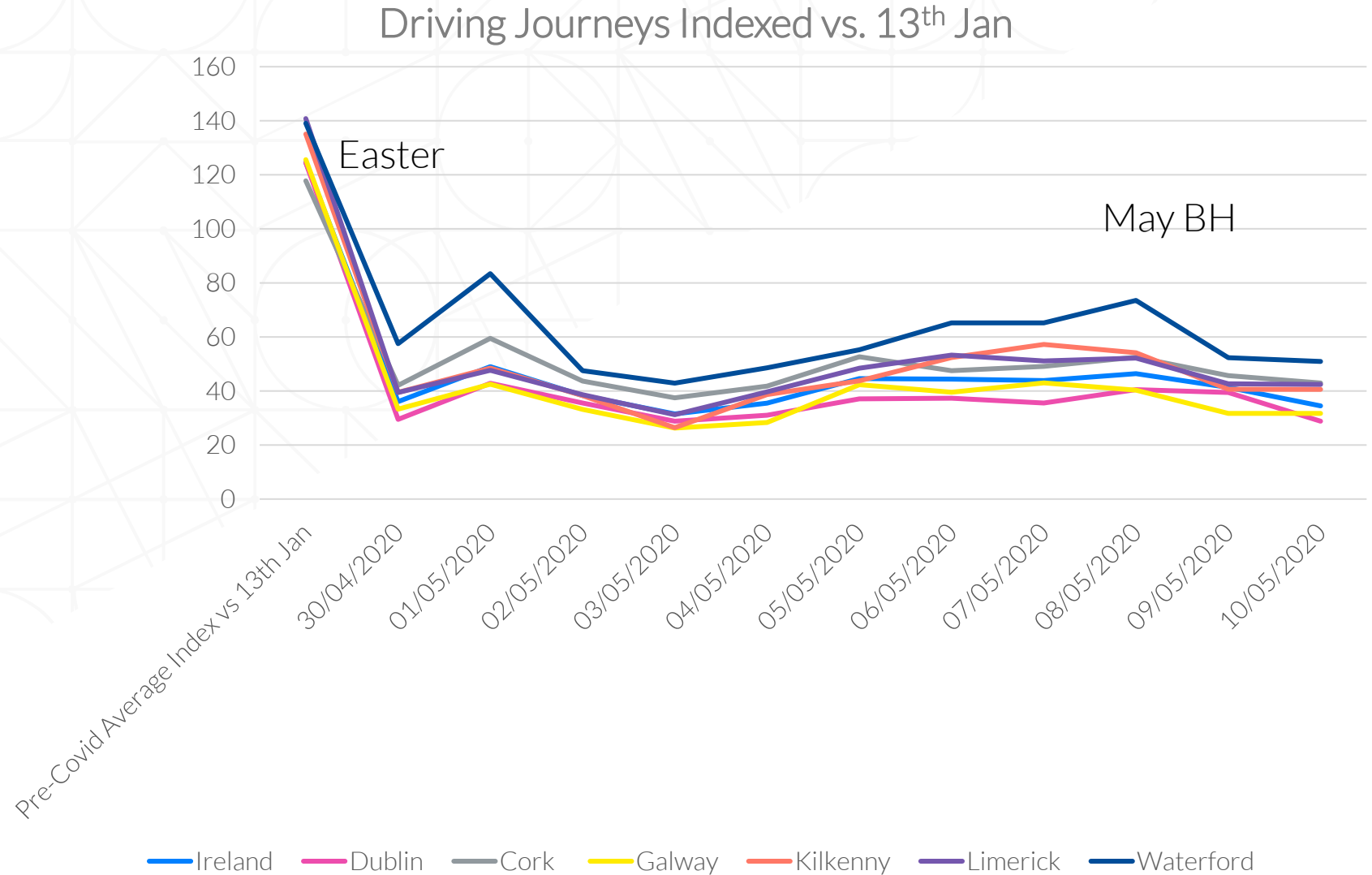
## Some Movie Releases Have Gone Straight to Online Platforms

Movie	Starring	Original Launch Date	New Launch Date	Platforms
Trolls 2	Featuring the voices of Justin Timberlake, Anna Kendrick	6-Apr-20	Available now	Sky Store, Amazon Prime, iTunes./Apple and Google Play
Misbehaviour	Keira Knightley and Jessie Buckley	13-Mar-20	15-Apr-20	YouTube, Amazon Prime, Google Play, YouTube
Emma	Anya Taylor-Joy, Bill Nighy, and comedian Miranda Hart	14-Feb-20	20-Mar-20	YouTube, Amazon Prime, Google Play
Bloodshot	Vin Diesel	13-Mar-20	24-Mar-20	Sky Store, YouTube, Google Play, Amazon Prime
Onward	Featuring the voices of Chris Pratt and Tom Holland	06-Mar-20	04-May-20	Sky Store, Amazon Prime, Google Play, iTunes
Vivarium	Jesse Eisenberg and Imogen Poot	27-Mar-20	27-Mar-20	Amazon Prime, YouTube, Google Play
Artemis Fowl	Starring Judy Dench, Colin Farrell and Nonso Anozie	29-May-20	12-Jun-20	Disney+
The Hunt	Hilary Swank and Emma Roberts.	11-Mar-20	11-Mar-20	Amazon Prime
Scoob!	Featuring the voices of Zac Efron, Amanda Seyfried and Mark Wahlberg	15-May-20	15-May-20	Amazon Prime
The Way Back	Ben Affleck	24-Apr-20	24-Apr-20	Amazon Prime
The King of Staten Island	Pete Davidson	19-Jun-20	12-Jun-20	tbc

## Out-of-Home:

Latest data from Apple shows increased driving journeys but with a greater level of mobility noted in Waterford, Kilkenny and Cork relative to the norm.

Dublin journeys are still at less than 50% of normal levels but are showing signs of growth, which will continue as lockdown eases.



The background features a dark blue color with a network of light grey nodes and lines. The nodes are arranged in a circular pattern, with lines connecting them to form a complex web. The network is composed of several interconnected clusters of nodes, creating a sense of connectivity and structure.

## About Core

We are Ireland's largest marketing communications company, collaborating across 9 practices, providing services in sponsorship, strategy, research, investment, media, creative, learning, data and recruitment.

• For more information

[onecore.ie](http://onecore.ie)

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