

# COVID-19: Latest Media Trends

dentsu  
AEGIS  
network

9th April 2020

# Main Television Trends During Covid-19:



- TV Viewing is continuing to increase significantly.



- No other media can bring the nation together like TV can. The live broadcast by Leo Varadkar was watched by 1.6 million people, setting a new record for a TV audience.



- Consumers are returning to key events and appointment to view programming such as news, current affairs and live entertainment.



- Daytime viewing has also seen a very significant increase as this daypart becomes a more important part of the TV schedule.



- Increased viewing is adding to the incredible value in the TV market currently with costs for the May-July period forecast to see a -35% decline in costs year on year.\*



- Future TV schedules will be disrupted due to the absence of live sport and the cancellation of filming future episodes of regular programmes such as Winning Street, Home and Away, Eastenders, Coronation Street, Fair City, Angela Scanlon, Hollyoaks, Neighbours and potentially Love Island.

# Increase in viewership across the board\*

**RTÉ**

**+ 41%**

Adults 15+

**+ 43%**

Adults 15-34

**+ 55%**

ABC1 Adults



**+ 13%**

Adults 15+

**+ 14%**

Adults 15-34

**+ 18%**

ABC1 Adults

**sky**

**+ 12%**

Adults 15+

**+ 7%**

Adults 16-34

**+ 19%**

ABC1 Adults

\*Share of Commercial Viewing YOY

# Linear TV seeing large increases as people adhere to social distancing measures

Increase to TV viewership, **RTÉ** and **VMS** viewership rising **between 20% and 30%** on the previous week.

Pros: The high viewership and low revenue will lead to **price deflation** in the market for those who continue with their TV advertising

Cons: TV stations will have come under pressure for making certain shows, such as **soaps and live shows**, and all **sporting events** have been cancelled, which will all impact viewership.

## Leo's speech sets new TV record as 1.6 million tune in



Taoiseach Leo Varadkar making his historic St Patrick's Day speech

Melanie Finn

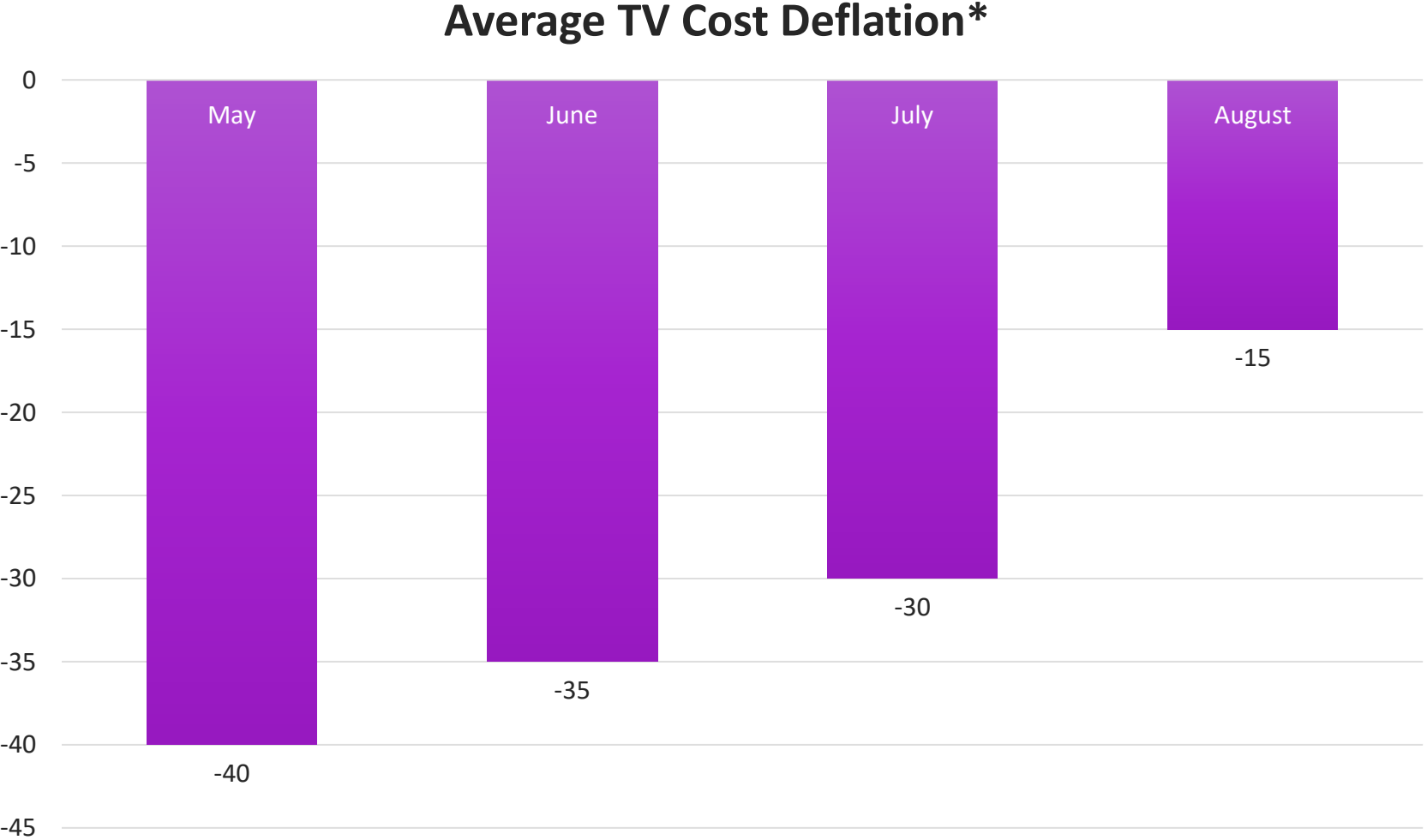
March 19 2020 07:32 AM



A record-breaking 1.6 million viewers watched Tuesday night's broadcast to the nation by Taoiseach Leo Varadkar about the Covid-19 crisis.

The previous all-time high of 1.35 million watched the Late Late Toy Show.

# Significant TV deflation in future months



\*Note: pricing is estimate and subject to market conditions

# Broadcasters are seeing the pinch across April and May and have relaxed AB pricing in these months



Shutting daytime and post peak breaks from 11<sup>th</sup> April, Potentially to remain until the end of May.

RTÉ offering -10% off station price in May.

Bonus over-deliveries of 30% approx. in April which will likely continue into May



Floating price mechanic reduction of:

- Apr: -11%
- May: -12%

VMS VOD – Offering 33% bonus to all advertisers



Offering price reduction in April for both VOD and Adsmart of -20% for campaigns less than 5k and -30% for campaigns greater than 5k. Kids pricing down -50% in April

As they work a floating trading model pricing outside of kids for all audiences is down in line with revenue and impact positions, example below on 25-44s

Apr -42%  
May -38%  
Jun -37%  
Jul - -11%



Short term deals available on request for late money.

Campaigns within month seeing significant over-deliveries up to 100%

# Main VOD Trends During Covid-19:



- There has been a large increase in video on demand consumption in recent weeks both in terms of the players, Youtube, and subscription based companies.



- Netflix has been asked to downgrade streaming quality as viewing leads to overloaded broadband networks.



- Disney Plus likely to see strong uptake as its launched on 24th March in Ireland.



- Examples are emerging of paid-for services offering free content to help during COVID-19, such as Spotify offering free video for charities.

# VOD viewing is significantly up



RTE

**+ 36%**

RTE Player  
Streams in March  
vs Feb



sky

**+ 42%**

Commercial viewing to  
On Demand & Sky Go  
since March 12<sup>th</sup>



Virgin media

**+ 67%**

Virgin Media Player  
Live streams  
month to date



4

**+ 38%**

All 4 Player streams  
are up on pre-Covid



# Main Digital Trends During Covid-19:



- Key lifestyle categories such as Health & Wellness, Fitness, Family & parenting are seeing significant traffic increases.



- There is also increased traffic to news sites, grocery retailers, delivery services and online game sites.



- A similar trend in search with high demand for online groceries, consumer tech and Covid related searches.



- Social is providing an important source of community support and entertainment with influencers uniquely placed to help bring communities together.

# Increase on time spent on mobile devices



Desktop  
**+14%**



Smartphone  
**+35%**

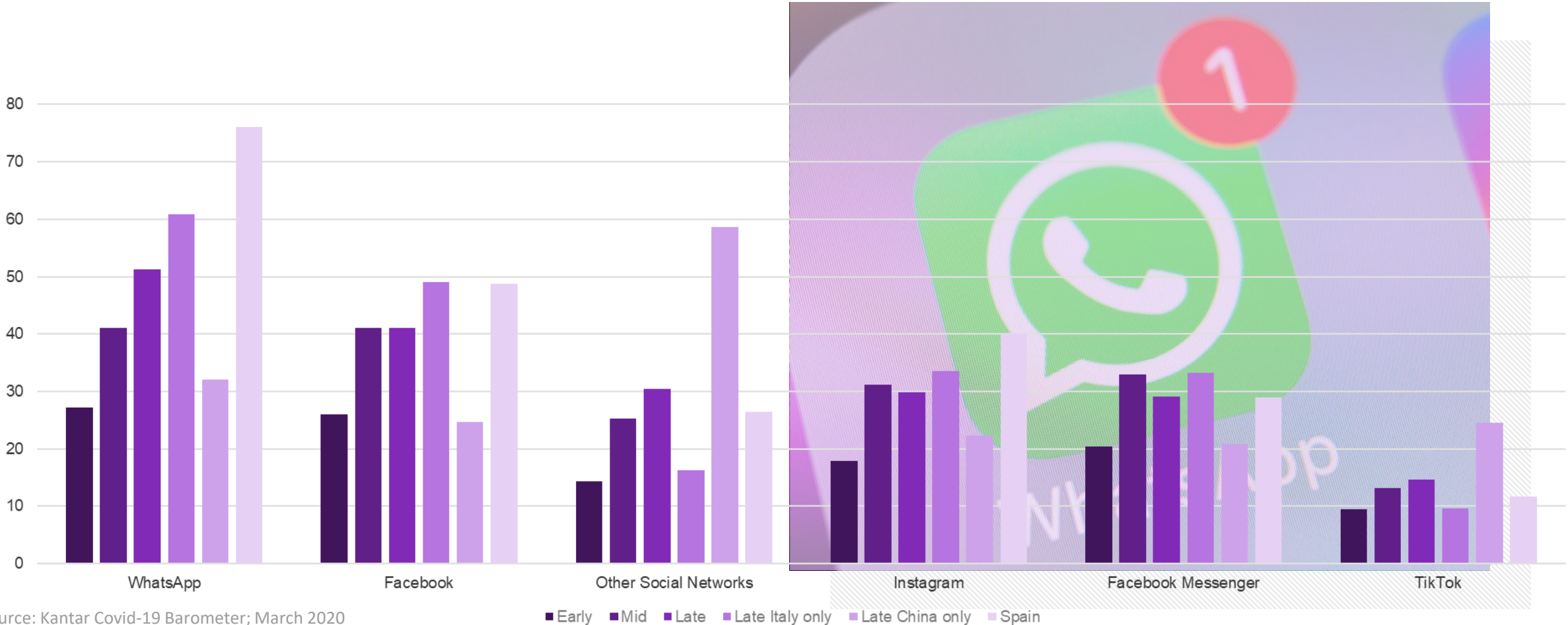


Tablet  
**+30%**



Source: Based on comparison of cookie volumes from Dv360 for w/c Feb23 vs w/c Mar 15

# WhatsApp has seen the greatest gains, as people look to stay connected



Source: Kantar Covid-19 Barometer; March 2020

# Main Radio Trends During Covid-19:



- Radio is continuing to evolve its content to reflect the current changing social norms and are running Covid related content, home workouts, book clubs, quizzes, family activities to support changing audience behaviour.



- Radio stations have great capacity to work quickly with advertisers to create new content that is relevant for the current environment and reflects the new social norms.



- Digital audio listening has also seen a very sharp increase.

# Radio listenership is on the rise

With JNLR suspended, radio stations can not report official circulation figures, however, digital streaming figures along with active listening sessions, suggest a big increase on this time last year, all down to Covid19.

IRS+



**+28%** Reach

**+41%** App Downloads

Source: Digital Listening across Communicorp Stations 30<sup>th</sup> Mar-5<sup>th</sup> Apr vs Avg Week in Feb'20



**+61%** Digital Streams Listening Hours

**+48%** Digital Streams Active Sessions

Source: Adswizz and Google Analytics-Mar 20 vs Mar 19



**ANYTIME, ANYWHERE**

Monthly online listeners reach 250k  
for Radio Nova

**50 TIMES MORE CURIOSITY**

The Morning Show with Declan  
Meehan had 50 X more listeners  
week on week



**Highland Radio**  
Ireland's No. 1 Local Station

**ALL ABOUT COMMUNICATION**

Text engagements increased by 30%  
for Highland Radio

# Mondelez Reacted Quickly To Covid-19 and adapted their “Easter” Media Plan

Today FM did an on air Easter Egg hunt, when users heard the daily noise on the show ,they would text to win

Mondelez needed to remind the public that Easter is still approaching, and the **magic of an Easter Egg Hunt** can still take place in the home.

Mondelez partnered with **Media Central** and turned around an innovative campaign across their suite of stations to encourage people to hide eggs for the people they love at home.

Today FM social competition garnered almost 5,000 entries where users were asked to like and comment on the post



- Weeklong Promo on Dermot & Dave on Today FM
- Weeklong Promos across Spin 1038, Spin Southwest, iRadio & Beat
- Social Competitions Across Today FM, Spin 1038 & 98FM
- Weekend Promo on Alison Curtis on Today FM

# Digital audio listenership also increasing

↑ 36%

Podcast

↑ 26%

Music  
Streaming

↑ 15%

Total Digital  
Audio  
listening

↑ 10%

Increase  
in  
Reach

↓ -9%

Radio  
Streaming  
decline

(people staying at  
home are reverting to  
FM radios)

- Listener base is broadening and starting to reflect All Adult distribution
- Flatter consumption across the day than, as people working unstructured hours

# Latest OOH Trends During Covid-19:

**Out of Home** had had a significant reduction in audience due to the restriction of movement but despite this, it is being used to provide COVID-19 health messages and Point of Sale digital screens can provide opportunities for relevant messages close to the point of purchase

The **HSE handwashing** Digital OOH campaign is testament to the role OOH will play for all manner of emergency or health and wellbeing communication.





# Latest Print Trends during Covid-19:

People turn to **heritage news brand** at a time of crisis and we saw significant increases in circulation following the outbreak of COVID-19.

Whilst sales are up considerably in key retail units (i.e supermarkets) this is counter balanced by other retailers being closed (i.e Easons, Train Stations..) and we are seeing **circulation figures down in April.**

Home delivery is up considerably and **An Post** are commencing Newspaper deliver.

# Print circulation figures are dropping

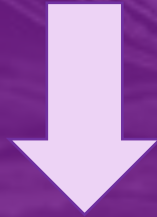
NEWSPAPER SALES FOR THE LAST TWO WEEKS



-3%



-5%



-2%



-10%



-6%

# Thank You

Please reach out to your team lead if you require any further information