

BORD BIA
IRISH FOOD BOARD

BRAND FORUM

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30th April 2020

Irish Media Landscape

Inc Covid-19 Implications

BORD BIA
IRISH FOOD BOARD

core™



My AIM Today

Overview of the **current media landscape**, with a deep dive into the **opportunities for food and drink brands**



1

MEDIA EXPENDITURE FORECASTS

2

THE GROWTH OF VIDEO

3

THE EVOLUTION OF SOCIAL MEDIA

4

AUDIO & OOH IN A DIGITAL ERA

5

THE VALUE OF A FREE AND INDEPENDENT
PRESS

1

Coronavirus COVID-19

Social Distancing Outside
Spending time outdoors is good for our health. But social responsibility is essential for ALL our health.

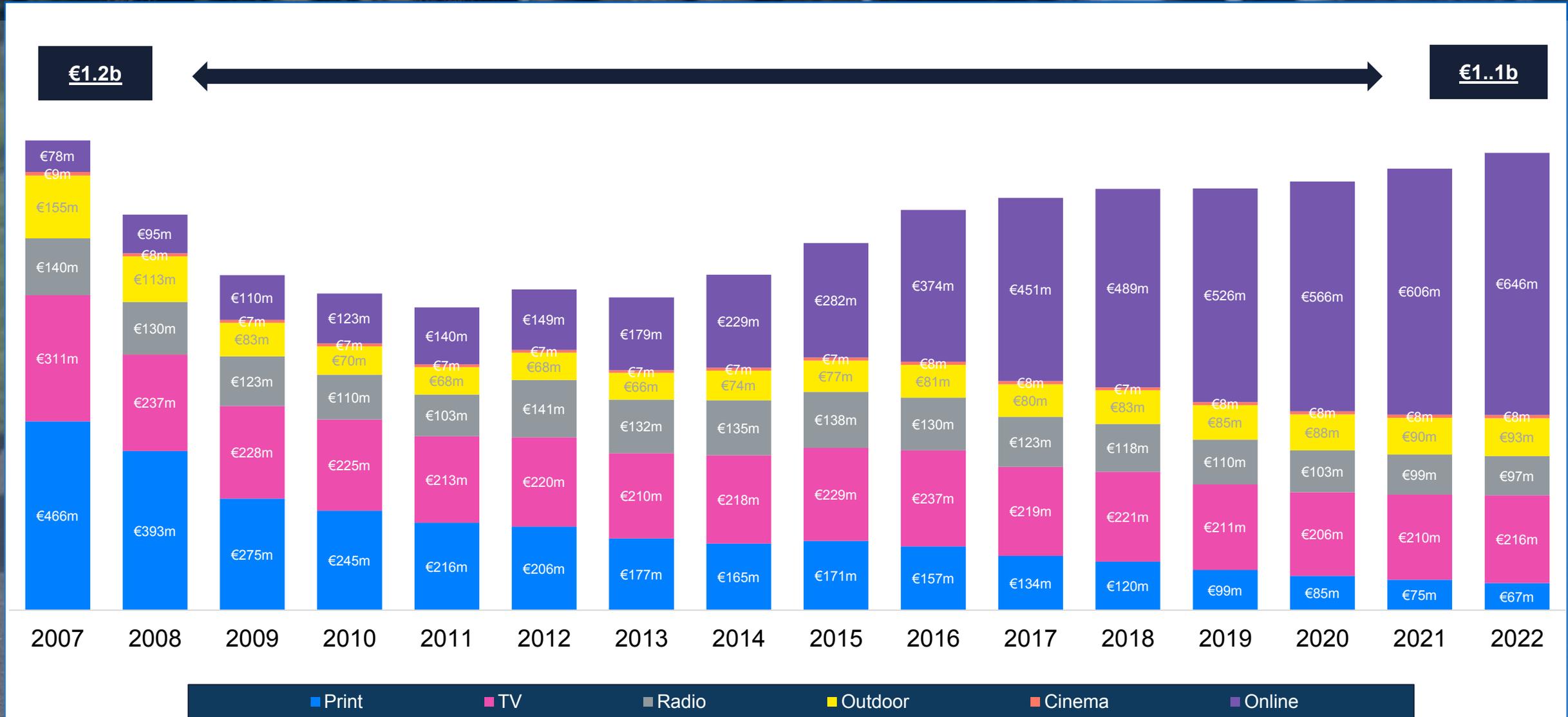
- Avoid** close contact with others.
- Distance** yourself at least 2 metres (6 feet) away from other people.
- Small group** sizes should be kept to a minimum.
- Don't arrange** to meet up with large groups.
- Don't meet** people who are working through the crisis, give them their space too. Thank you.

For Daily Updates Visit www.gov.ie/covid-19

HEALTH SERVICE EXECUTIVE | **HE** | **Sláinte na Míreann** Government of Ireland

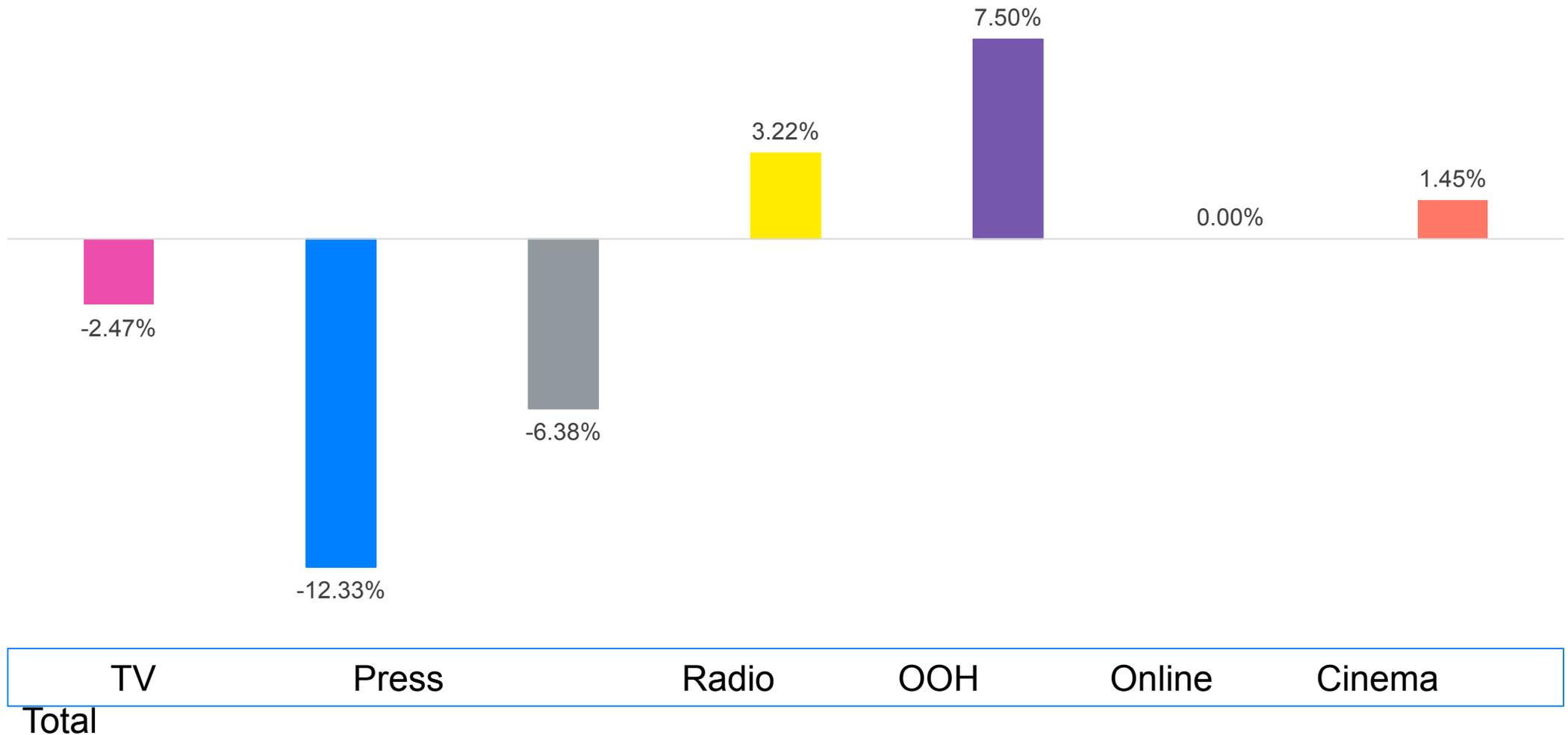
Media Expenditure Forecasts

Core Outlook 2007 - 2022



SOURCE – Core Outlook 2020 (€m's)

2020 predictions



Our latest prediction

-30%

2020 prediction since the Covid
Crisis

Covid-19 - Initial trends

TV

Significant amount of deferral spends. May is approx. 50% down yoy

Press

Initially saw increased sales and online presence. Trust key. Also impacted by deferrals.

Radio

Reactiveness a plus for clients. Will see a decline.

OOH

Short-term will be significantly impacted. Supply/demand will be an issue in Q4

Cinema

Cinemas are currently closed

Digital detail



+6%

Search



+21%

Facebook inc
Instagram



+17%

Video



-1%

Display inc
partnerships

Covid-19 - Initial trends

Search

Short-term certain categories aren't live – travel, some retail, services, entertainment

Facebook

Similar trend as Search but decline could be bigger on growth predictions

Video

In line with TV trends

Display inc Partnerships

Some partnerships paused meaning spends could decline. Events a big problem

What this means for advertisers?

Extra delivery and added value across all media channels

Supply/Demand could become a big problem on 'popular' media channels later in the year

Plan for an aggressive ad market in H2



Disney
Television Studios

The Walt Disney Studios



PIXAR



2

The growth of
video

TV

Covid-19



Significant increase in consumption since 12th

M

Wk 1

+27%

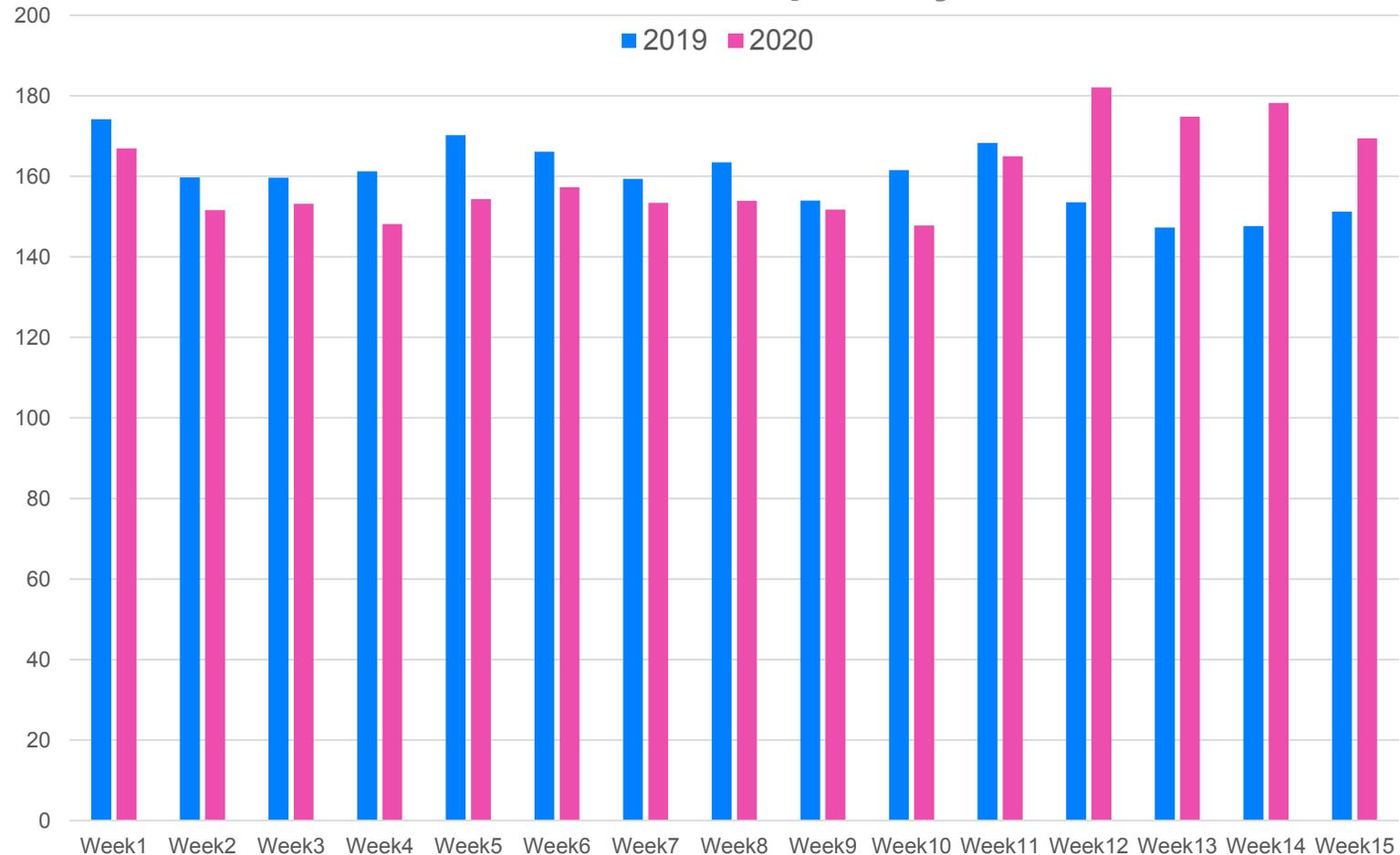
increase in Adult15+ viewing year-on-year.

Wk 4

+12%

increase in Adult15+ viewing year-on-year.

Minutes viewed per day



RTE Nine O'Clock News performing very well

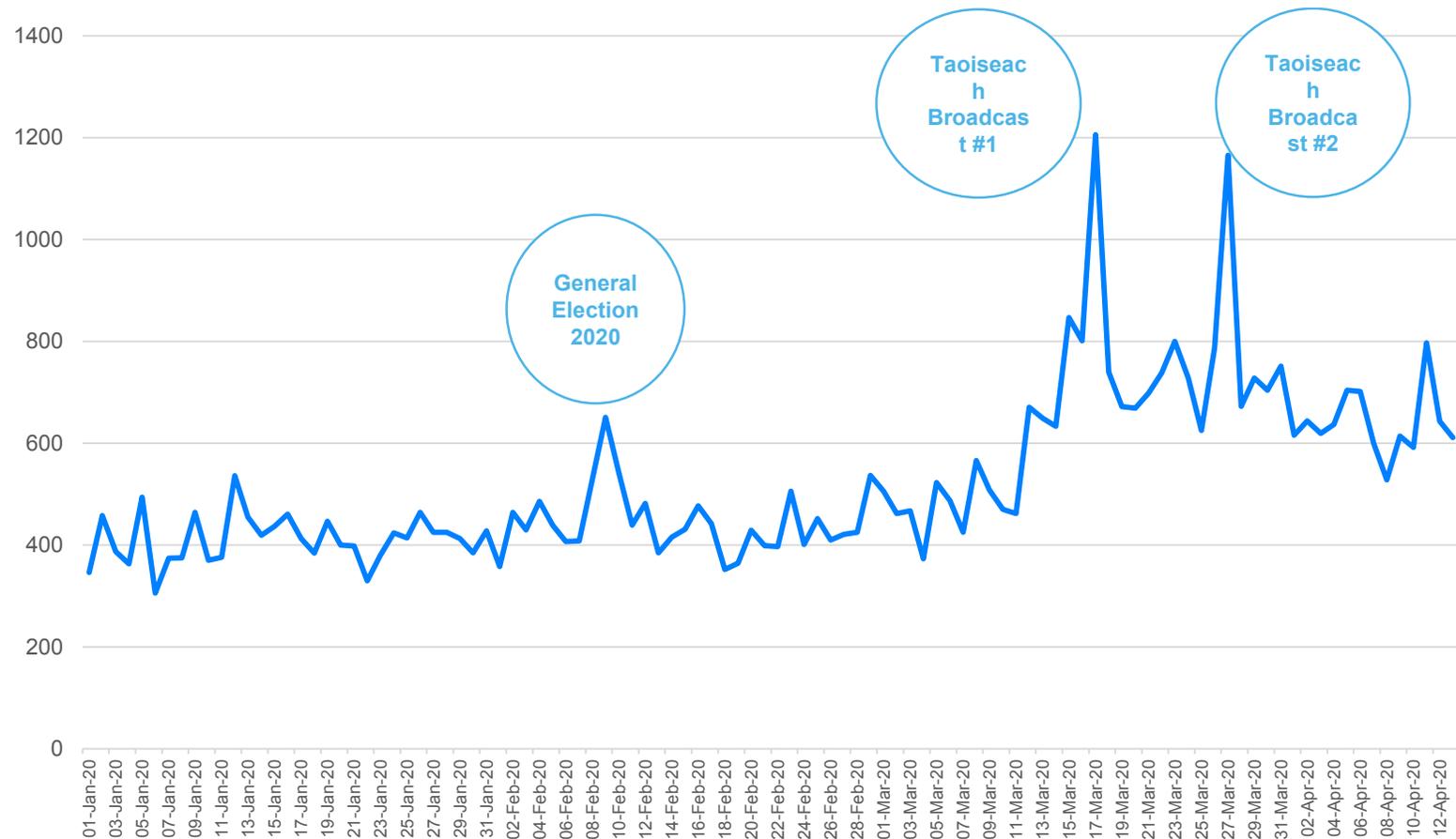
W

200%

increase in viewership since the start of the year

1.4m

Taoiseach broadcast – highest rating event of the last 10 years



Source: TechEdge - adult live programme viewership (000's)

Easter weekend saw a surge in viewing

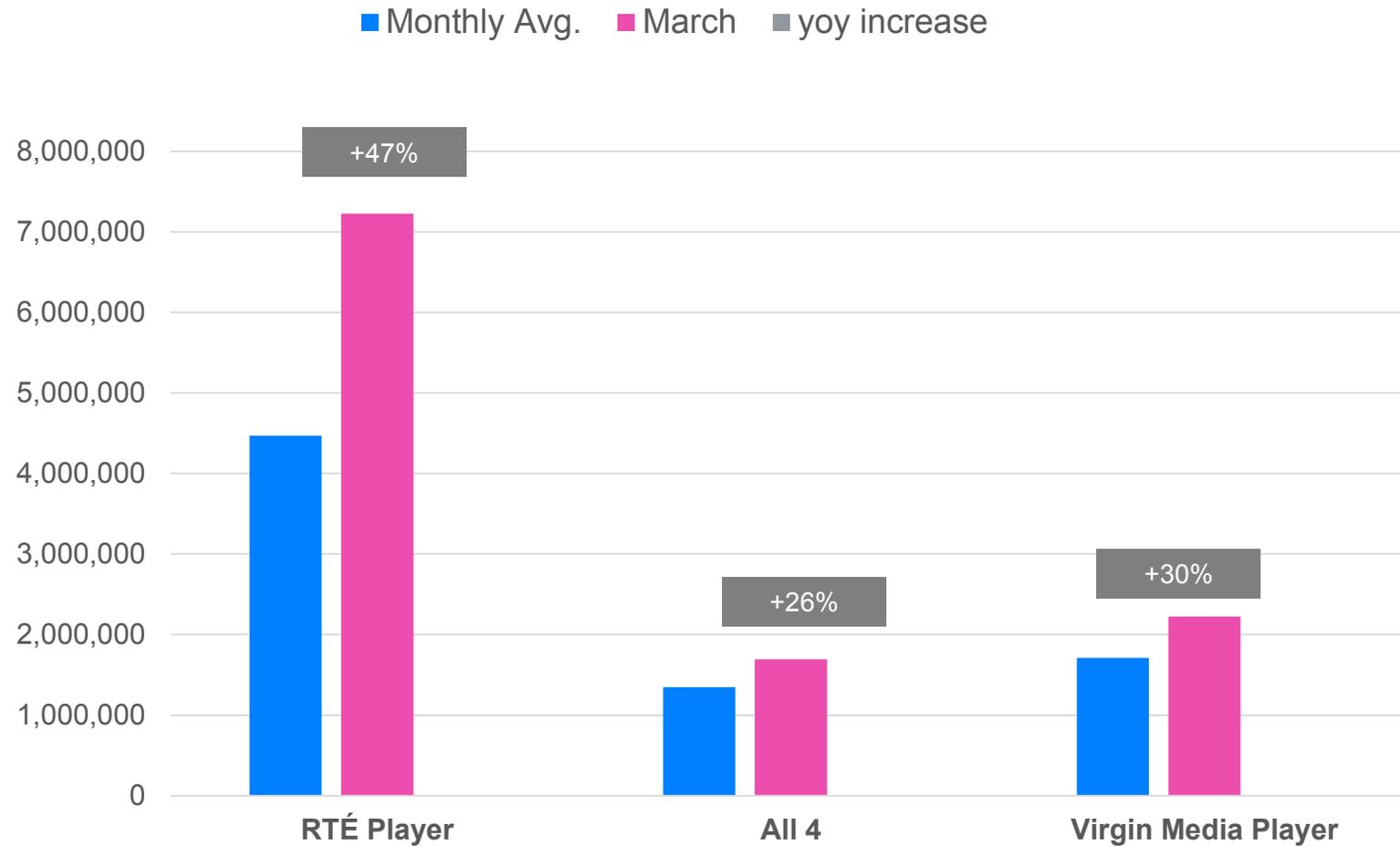
Minutes viewed per day – Easter weekend
year-on-year

	2019	2020	Diff
Good Friday	160.2	204.8	+27.8%
Saturday	148.8	181.1	+21.7%
Easter Sunday	174.4	236.0	+35.3%
Easter Monday	167.8	198.0	+18.0%

Popular programming (exc current affairs)

Programme	Audience size '000
Reeling in the years	472.18
Keys to my life	469.59
Cheap Irish homes	448.35
Home of the year	438.23
Fair city	435.45
Room to improve	407.23
Raised by the village	398.77
Coronation street 20	396.43
All round to mrs brown's	384.66
High road, low road	381.62

Online streaming grows at record levels



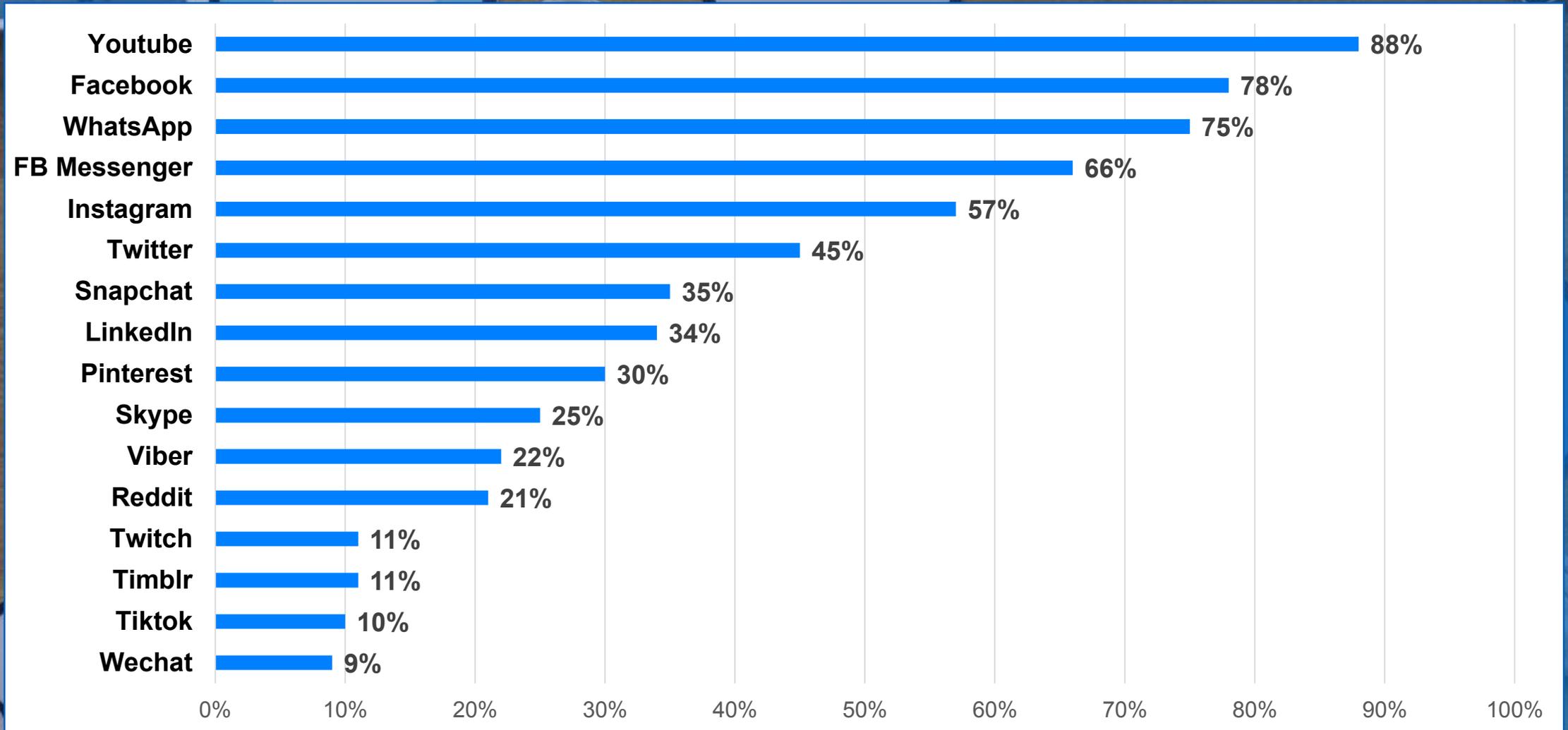
What this means for advertisers?

Covid led messaging moving towards “light entertainment” – eg: cookery programmes

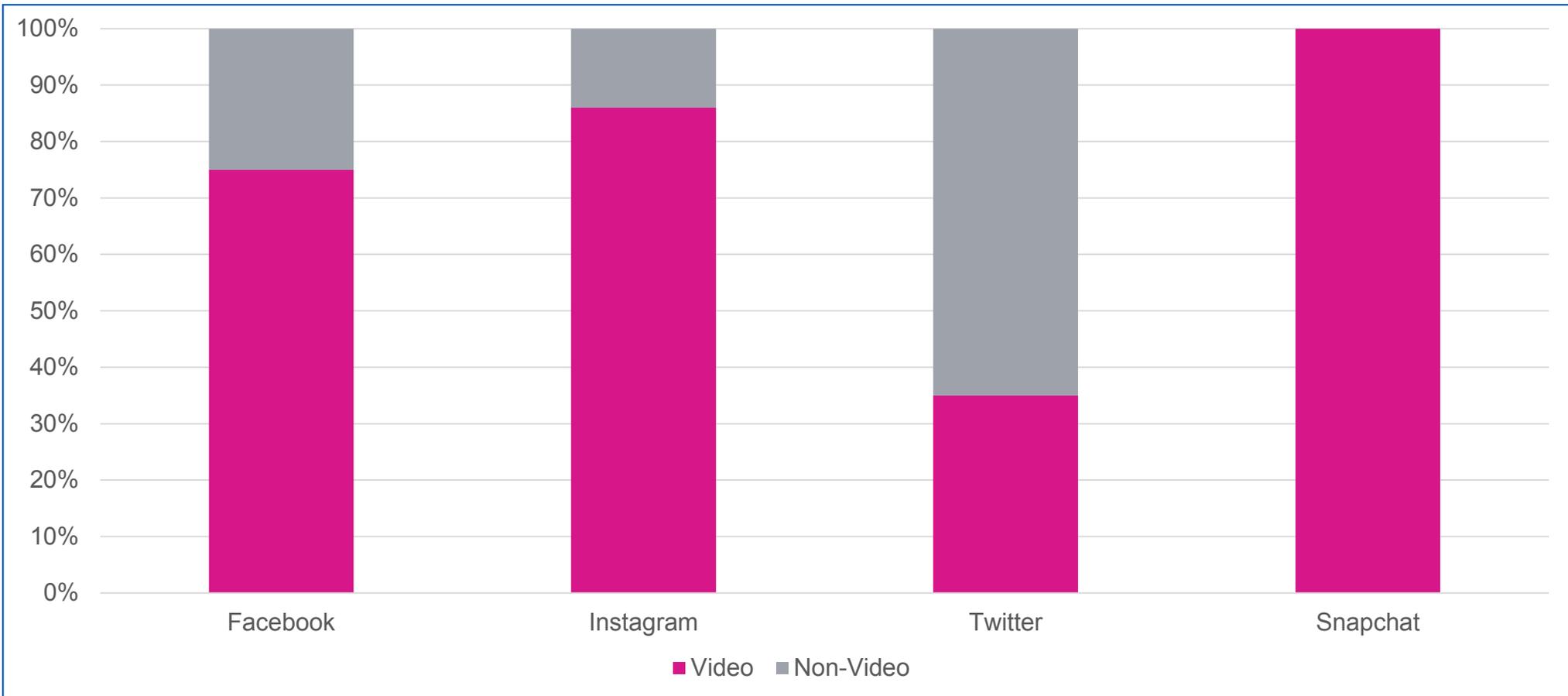
Low cost to entry for TV – Sky AdSmart

Long-term TV costs will increase

Most used social platforms



The pivot to video



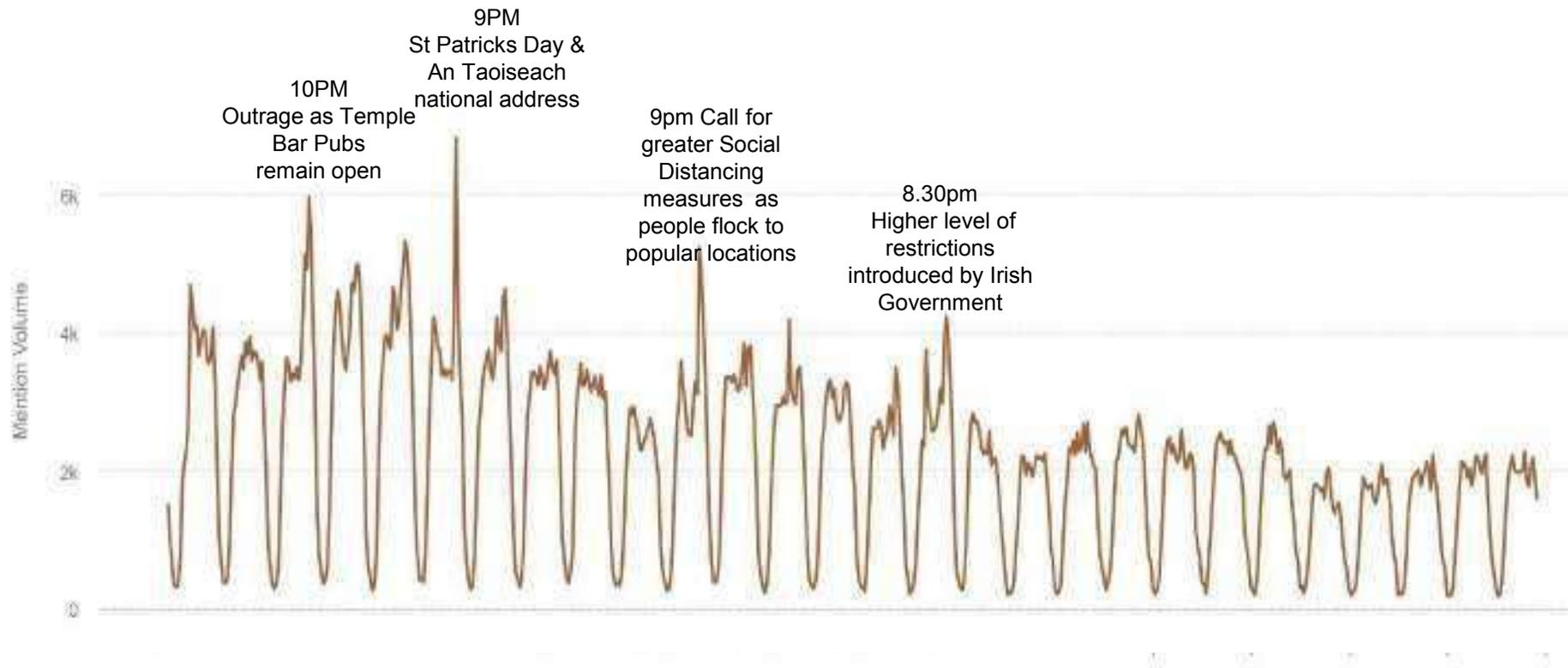
Social Media

Covid-19



Activities during this period

12 th : Schools close and panic buying	13 th – Cheltenham	14 th – UK Governmen t	15 th – Temple Bar	16 th – Uncertainty	17 th – St Patrick's Day	18 th – 21 st Slower Decline	22 nd Call for greater Social Distancing	23 rd – 24 th UK Lockdown Ireland Restrictions	27 th Higher level of restrictions
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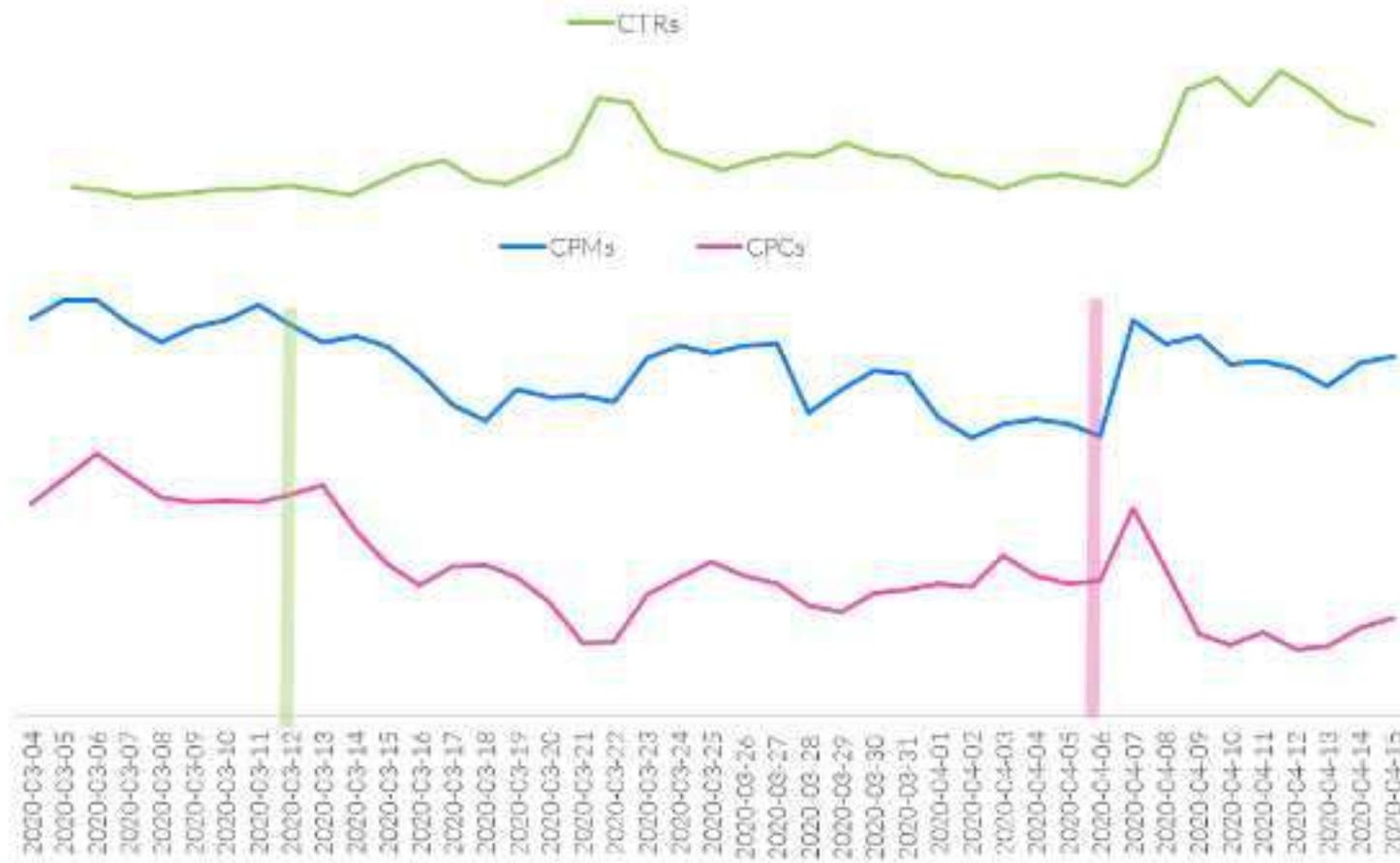
Covid-19 has dominated the conversation online



Pre-Covid : average 282 daily mentions

Covid : average 702 daily mentions

Increased consumption is impacting engagement



TikTok advertising has officially launched in Ireland

Social video app
Entertainment based platform

Similar to Vine with extra features

Lip syncing, dancing, comedic
skits

Filters, music, promotes
individualism

Primary target audience
<24 years old

**TIKTOK WAS THE WORLD'S SECOND-MOST
DOWNLOADED APP IN 2019, AND NOW
GENERATES \$40M PER MONTH**



Irish stats

**1
million**
Monthly
Active
Users

**61
minute**
Average
time spend
on the
platform

13
Average
times the
app is
opened

3 Billion
Monthly
video views

Key formats

1. Brand Takeover :

Full screen takeover with maximum awareness and



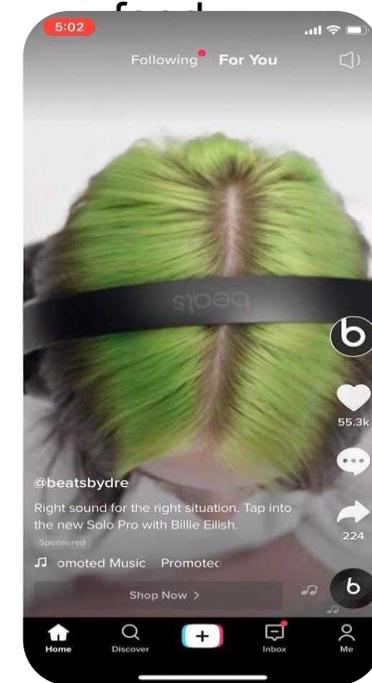
2. Topview:

Video format that launches on opening the app



3. In-feed :

Storytelling video format embedded within the 'for you'



Major restriction – no targeting available in ROI just yet

What this means for advertisers?

Increased usage of social media platforms is resulting in increased engagement with brands

Consumers are crying out for more entertainment

TikTok – is a big opportunity, but brand safety a big watch-out



4

**Audio and OOH in a
digital era**

Ireland is a nation of listeners

81%

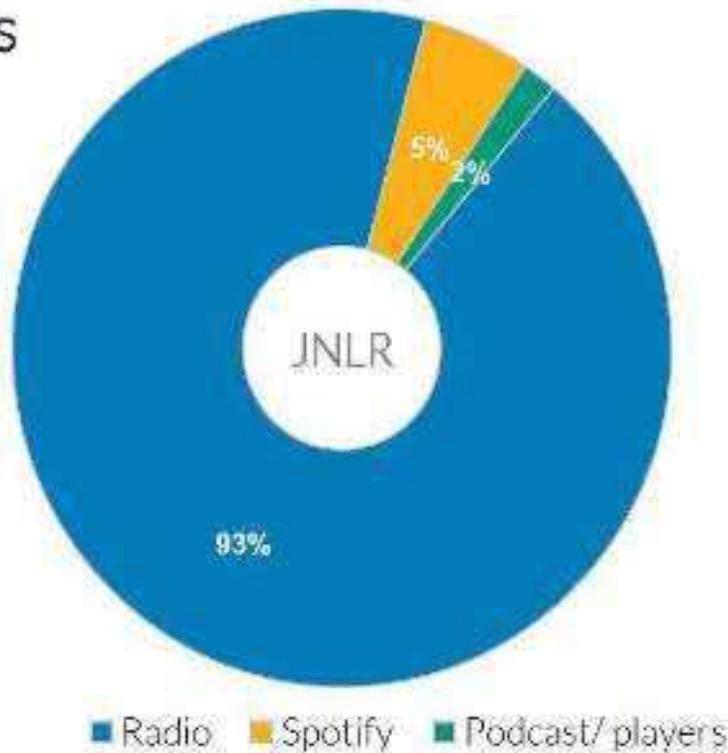
Adults listen daily

71%

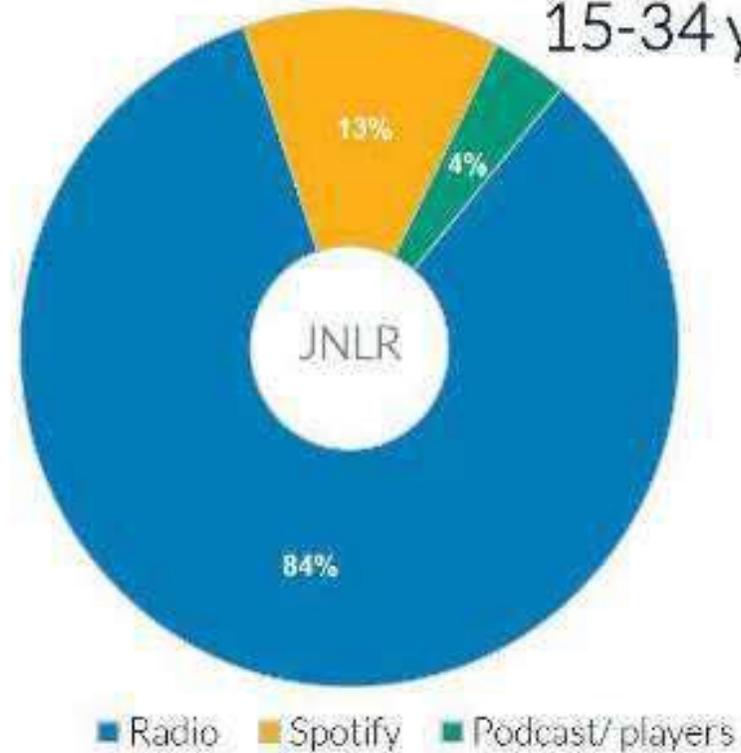
15-34 year olds
listen daily

Radio still the dominant medium for audio

Adults



15-34 yr olds



Podcasts continue to grow



Digital consumption



aCast

+1.5%

**+21.9%
weekend
consumption**



Spotify

>200%

**Consumption
all day,
versus peaks
and troughs
when
commuting**



COMMUNICORP
COMMUNICATIONS CORPORATION

+27%

**Growth in
digital
listenership**

What this means for advertisers?

More reactive than ever
for advertisers

Local radio key for SME
audience

Great deals across all
stations including local

OOH

Covid-19



> 90

%

Bookings deferred since
"lockdown"

What this means for

a

Retail sites/screens are
the main short-term
focus

H2 inflation will increase
significantly

FAI chief John Delaney steps aside amid financial queries

Mark Tighe

Sunday March 24 2019, 12.01am GMT,
The Sunday Times



**The value of a free
and independent**

5

INM Paywall/Journal donations



Premium

Less than €2.50 per week*

*Based on one payment of €10.00 per month

- ✓ Access to premium journalism from the Irish Independent and Sunday Independent
- ✓ Read online on any device and via the app
- ✓ Award-winning columnists
- ✓ Access on up to 5 devices

Subscribe

Premium 

Less than €3.50 per week*

*Based on one payment of €15.00 per month

- ✓ Access to premium journalism from the Irish Independent and Sunday Independent
- ✓ Read the Irish Independent, Sunday Independent, Sunday World and Herald Extra
- ✓ Full paper access for only an extra €1 per week
- ✓ Access on up to 5 devices

Subscribe

thejournal.ie

No news is bad news

Support The Journal

COORDINATES

€10 €15 €20 €30

Pay now

YOUR DETAILS

Full name

EMAIL ADDRESS

SUBSCRIBE (€10 per month)

Mark T
Sunday
The Su

Growth across print and digital

-10%

**Initial increase in print sales (average),
which has now declined**

Increase in e-papers and subscriptions

Suburban focus

Weekend sales record 2020

An Post now delivering newspapers

+18/95%

Record traffic days for many sites

News the key driver

Wk1/2 saw record levels

Wk 3 onwards have witnessed a slight decline
as people move away from only focusing on
news

Daily Mail Group and SME's



The ads will run across DMG Media Ireland's titles, including the Irish Daily Mail, the Irish Mail on Sunday, Extra.ie, EVOKE, RollerCoaster.ie, and MailOnline, which reach over 3.3m Irish adults every month in Ireland.

What this means for advertisers?

Cross-media
opportunities – great
value

Trusted source of news

Mark T

Sunday

The Su

1

MEDIA EXPENDITURE FORECASTS

30% decline in
2020

2

THE GROWTH OF VIDEO

TV is a big
opportunity

3

THE EVOLUTION OF SOCIAL MEDIA

TikTok is worth a
test

4

AUDIO & OOH IN A DIGITAL ERA

Increased
consumption of
digital

5

THE VALUE OF A FREE AND INDEPENDENT PRESS

Trust is
invaluable

Data sources

Outlook 2020

<https://onecore.ie/outlook/>

Covid – Media
Consumption Habits

<https://onecore.ie/intel/covid-19/covid-19-changing-media-habits/>

Contact details

Colm.Sherwin@onecore.ie



Understand behavior to understand the future

At The Thinking House we have always invested time in understanding the future.

Our most recent thought leadership work has explored scenarios for the future of our industry over the next 25 years, future **innovations** in the meat category and the future of **'functional foods'** for the dairy category and beyond.

Our approach is always to put the consumer at the heart of how we go about understanding the future...



Understand behavior to understand the future



We have also focused on understanding consumer behavior to help guide marketing and innovation strategy.

Our most recent behavioural study was 'What Ireland Ate Last Night'; a large scale **diary** study of dietary habits.

In international markets we have used consumer **ethnography** to unlock insights around the drivers of consumer behavior.

Future Proofing through behavioural research

The Covid-19 crisis has already ready produced **dramatic changes** in consumer and shopper behavior.

The Thinking House will track and trace these behavioural shifts to provide our client companies and their customers with a rich reservoir of insight. Our ambition is to identify behaviours that are **'sticky'**.

We have identified the 'early indicators' of key changes in consumer behaviour under three key areas:

- Macro Behaviour
- Shopper Behaviour
- Consumption Behaviour



Future Proofing through behavioural research

And we are tracking the 'stickiness' of these early indicators through a regular pulse measure of consumer behaviour in key markets. This omnibus poll of consumer and shoppers will act as a behavioural monitor:

- 1000 people per market
- 4 key markets
 - Ireland
 - GB
 - Germany
 - USA



Working with us to Future Proof your business

The team at the Thinking House are developing a bespoke toolkit to enable producers and their customers work through the implications of these behavioural indicators. The toolkit is built around a simple three step-process that can be navigated by businesses large and small.



Future Proofing through behavioural research

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Brand Communications Strategy Webinar

Date: Thursday 7th May '20

Time: 11:00 - 12:00 hrs

Register: www.bordbia.ie/industry/covid-19