



TV

TV is the highest grossing media, followed by Press and Radio.

TV market share dipped as did press and radio, with OOH, Internet & Cinema making gains across the board.

We are spending more time consuming media every year - though media consumption is peaking as maximum capacity is being reached.

Overall media spend is down 2-3% so far in 2019 - and Brexit uncertainty is a factor.

TV remains the most powerful format - 6 of the top 10 programmes were on RTE, 4 on Virgin Media.

Irish adult viewers watch over 3 hours of TV every day which equates to 22 hours each week. 84% of measured content is watched Live.



RADIO

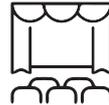
Radio. A massive 82% of all adults in Ireland listen to radio on an average day.

Radio listeners tune in an average of over 4 hours per day, and listen to an average of 1.6 stations per day.

Radio still holds the largest share of all audio listening.

Of all audio consumed, 85% of that time is spent with radio specifically. People's own music remains second, while Podcasts and Spotify have made significant gains in recent years.

In the 15-34 age bracket radio drops to 70.7% of total audio consumption.



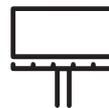
CINEMA

Cinema in Ireland has the highest admissions at an average of 3.3 movies versus a European average of 1.7.



PRINT

Print readership continues to decline however it's a beneficial secondary media especially for an older audience. Readership is still quite strong with a mix of broadsheets & tabloids.



OUTDOOR

Outdoor Strong OOH market and very dominant in Dublin. Creating a high impact OOH campaign outside of Major urban areas can be difficult due to universe of panels available. Digital innovation is gaining share.



DIGITAL

Digital advertising spend is growing. Search (36% Share), Display (32%), Social (20%) & VOD (12%). Digital has seen massive growth, but internet use has begun to stagnate as it reaches peak saturation. Digital Marketers have turned their attention to dual or second screening - especially for Social.



VOD/AV

VOD / AV consumption continues to grow however we are starting to see it level off with older age groups. YouTube remains the prime channel.