

**Submission on behalf of RTÉ to
Dail Éireann Covid Committee**

Impact of Covid-19 on RTÉ

Friday 26 June 2020

RTÉ and Covid-19

RTÉ, as the national public service media, has unique responsibilities as outlined in the Broadcasting Act 2009. At the heart of these is the mission to provide people in Ireland with an impartial and comprehensive news service.

Even pre-Covid, RTÉ was one of the most trusted organisations in the country, and in critical times when the nation must come together, it turns to RTÉ. As illustrated overleaf, this has been particularly evident during the peak weeks of Covid-19, when audiences of all ages turned to the national broadcaster for information, advice, entertainment, companionship, diversion and cultural connection. In an era of misinformation, and half truths, it is heartening to see that so many Irish citizens ultimately relied on public service media during the peak of the Covid-19 crisis. B&A research conducted in May confirmed that 4 out of 5 of those surveyed said that they were using RTÉ television or radio services for information, while 76% indicated that they would trust either of those sources above all else. This finding is also reflected in the exceptionally high levels of audience engagement for RTÉ's Covid-19 coverage on television, radio and online.

RTÉ demonstrated its clear public purpose during this crisis, as an essential service, bringing the nation together. Throughout this period RTÉ maintained full schedules across all services and also played an important role in meeting the needs of the diaspora.

However, Covid-19 has created a range of very challenging impacts for the organisation which include:

- **Reduced income;** both licence fee and commercial. Since the crisis took hold licence fee sales have fallen sharply. RTÉ is not responsible for licence fee collection but is directly impacted by it. Given that national evasion levels were already at almost 13%, prior to the Covid emergency, this current situation has intensified an existing problem. Advertising has also been severely impacted – as businesses ceased trading so too did their need to advertise. Current estimates project that total income is likely to be reduced by between 25% to 35%. These combined factors therefore have exacerbated existing financial vulnerabilities considerably.
- **Additional costs** –RTÉ responded to the national Covid crisis by aiming to meet the needs of citizens in as many ways as possible including; increased news coverage, dedicated programming, and new commissions. The need for additional programming, among other Covid-related demands, has also resulted in additional expenditure. A more comprehensive outline of RTÉ's response to the public service media demands of Covid-19 is outlined overleaf.
- **Production complexity** – many types of production (most notably drama and in-studio audience programmes) have been suspended or had to be radically altered. This has significant impact on our overall programme schedules and planning. Production at our various studios around the country have been overhauled to reflect demanding protocols around hygiene, social distancing, and technological demands. This has placed significant additional demands on our operational support staff in particular and reduced studio capacity.
- **Reduced studio capacity** – in order to maintain a safe site, minimal and only essential operations were conducted within studio spaces.

- **Orchestras** – both the RTÉ National Symphony Orchestra and the RTÉ Concert orchestra have been stepped down from all live performances and rehearsals for the foreseeable future arising from the current demands regarding social distancing, and the closure of performance venues. Discussions are ongoing as regards the process of transition of the RTÉ National Symphony Orchestra to The National Concert Hall (as established in 2018), but in the interim, the members of this orchestra remain within the employment of RTÉ.
- **Drama production** has been stepped down – *Fair City* suspended filming in March of this year. Plans are underway to resume filming when appropriate, and within guidelines. A number of dramas have had to suspend filming at this time, and with travel and quarantine restrictions in place, it is difficult to ascertain when it may be possible to resume.
- **Programme production** – many of the programmes that had been planned for the summer and autumn season can no longer be made; either because the nature of the programme is incompatible with filming under HSE workplace guidelines, or because it is no longer appropriate. This applies to both in-house programming and commissioned programming. As outlined on page 14, this has particular impacts on the independent sector who rely extensively on RTÉ for programme commissions. RTÉ has honoured all existing contractual arrangements with respective independent production companies, but many of these programmes may not now be made until 2021.
- **Loss of live sports** – coverage of live sporting events is a significant element within our broadcast schedules on both television and radio. These gaps have been addressed with archive sports content where possible, but this has also involved negotiations with many rights holders.
- **Live music** – whilst RTÉ has been resourceful in terms of its continued promotion of live musical performances throughout this period, the demands of maintaining a safe site, and the demands around physical distancing, are making the options around live performances very difficult. The arts community rely on promotion of this type to drive audience engagement and this therefore has a knock on effect on that community.
- **Programme schedule impacts** - given the dynamic nature of the situation, and anticipated restrictions, short and medium term planning is very compromised. This is inevitably creating pressures in programme production and schedule planning.
- **Enabling remote working** – within days RTÉ was faced with the challenge of enabling over 1,000 of its workforce to work remotely. This has involved additional investment in equipment, software and technological supports. In certain instances, reduced access to specialist equipment has compromised efficiencies, and made the delivery of certain tasks more complex.

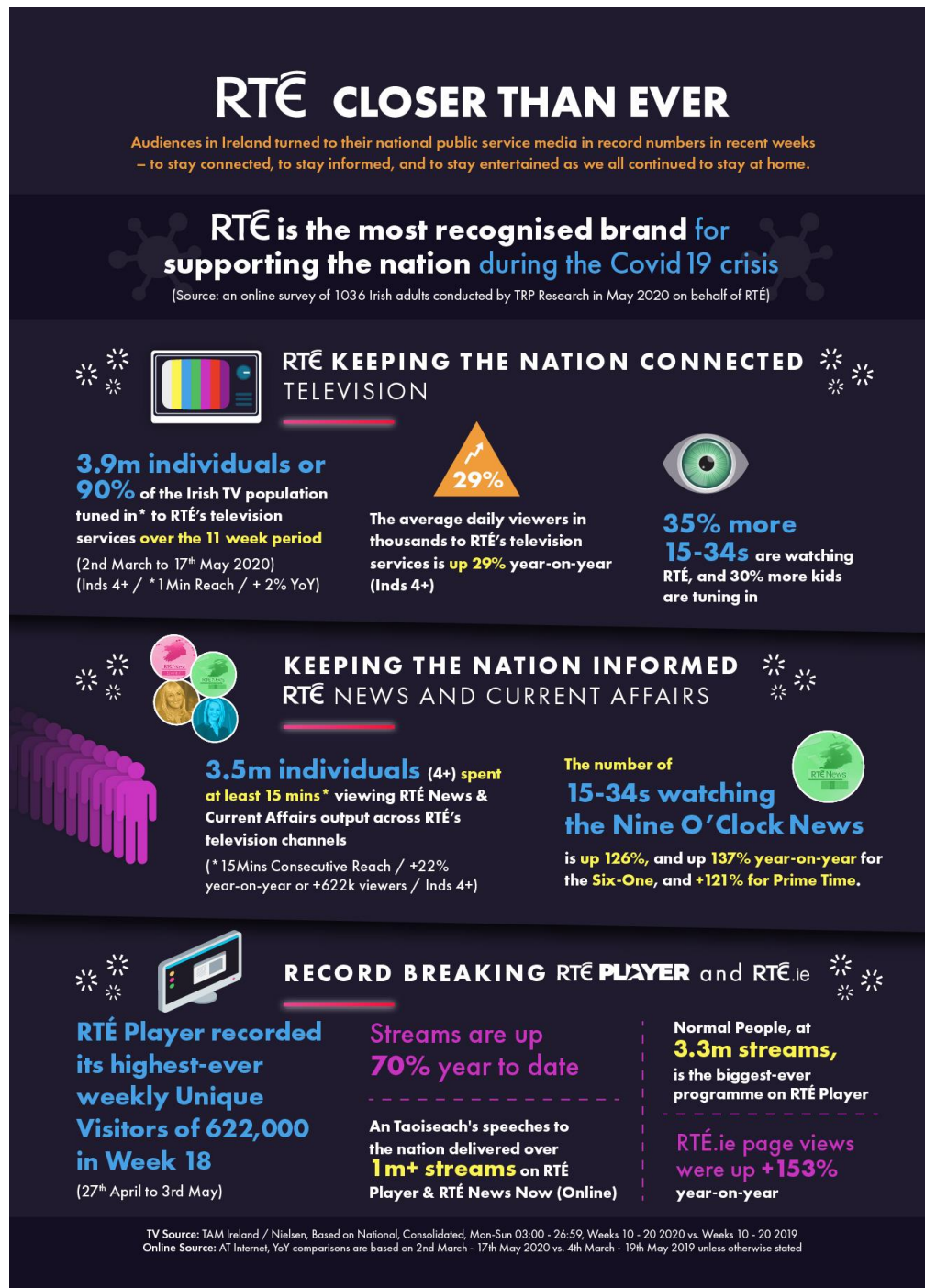
Overleaf we have outlined some of the ways in which RTÉ has, and is continuing to, meet the needs of audiences during this period, but there can be no doubt that the delivery of this level of service, with such financial uncertainty and compromised resources, does have consequences for the organisation in both the short and medium term.

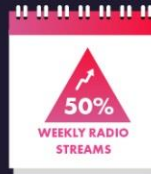
Dee Forbes

Director-General, RTÉ

RTÉ: Connecting with Audiences at a time of crisis.

The ambition of RTÉ throughout this crisis, was to act as a cohesive resource of information and support throughout this national crisis. Some of the ways in which RTÉ connected with audience during this time are illustrated below:





From 2nd
March to 17th
May 2020...

...there was a
50% growth
in average weekly radio
streams at 1.3m vs. the first
9 weeks of the year (900k)



MayDay

24 Hours in Lockdown was watched
by **483,000 viewers**, with a **37.5% share** (Inds 4+)



RTÉ's Home School Hub

has a 1 minute reach of **49% among kids**,
with **372,000 kids** tuning in



RTÉ's #ShineYourLight

was watched by **728,000 viewers**,
with a **43.2% share** (Inds 4+)



The Late Late Show

was watched by an average of
693,000 people, with a **50.3% share**,
and was up **+94% among 15-34s**

TOP 10 Programmes

Based on Any Day, Any Time, Best Episode

Inds 4+ - 2nd March to 17th May 2020

Rank	Description	Channel	Date	Time	000s	Share
1	Taoiseach Leo Varadkar Ministerial Broadcast	RTÉ One	17/03/2020	21:00 - 21:11	1599.0	65.46
2	RTÉ News: Nine O'Clock	RTÉ One	17/03/2020	21:12 - 21:39	1303.5	61.70
3	The Late Late Show	RTÉ One	27/03/2020	21:52 - 23:29	875.9	59.00
4	RTÉ News: Special	RTÉ One	27/03/2020	20:28 - 21:07	829.3	46.89
5	RTÉ News: Six One	RTÉ One	17/03/2020	18:01 - 18:32	817.9	52.78
6	#ShineYourLight	RTÉ One	11/04/2020	21:00 - 21:04	727.5	43.18
7	Dancing With The Stars	RTÉ One	15/03/2020	18:31 - 20:28	694.5	46.16
8	Prime Time	RTÉ One	17/03/2020	21:47 - 22:22	680.5	41.48
9	Reeling In The Years	RTÉ One	17/03/2020	18:35 - 18:59	653.6	44.06
10	Gerry Ryan: A Legacy	RTÉ One	26/04/2020	21:30 - 22:28	568.2	39.61

TV Source: TAM Ireland / Nielsen, Based on National, Consolidated, Mon-Sun 03:00 - 26:59, Weeks 10 - 20 2020 vs. Weeks 10 - 20 2019
Online Source: AT Internet, YoY comparisons are based on 2nd March - 17th May 2020 vs. 4th March - 19th May 2019 unless otherwise stated

Covid-19 related information and messaging.

RTÉ provided live coverage for each of the main Taoiseach's addresses to the nation, ensuring that these major announcements received full amplification.

17th March

- 1.6M watched the Taoiseach Address on RTÉ One
- 1.3M watched RTÉ News Nine O'Clock bulletin afterwards
- 308K streams via the RTÉ Player and News Now App (Live + On demand)

24th March

- The Taoiseach's Address at 4pm on 24th March attracted audio streams of 250K

27th March

- 829K watched the RTÉ News Now Special on 27th March
- 1.2M watched RTÉ News Nine O' Clock bulletin afterwards
- 864K subsequently watched the *Late Late Show* that night
- 383K streams to the RTÉ Player related to News items search.

Over and above these Government announcements, all of the NPHET briefings were broadcast in their entirety on RTÉ News Now, and for announcements of particular importance, these were broadcast live on RTÉ One also. During the period 2nd March – 17th May 2020, 3.5m individuals spend at least 15 minutes viewing RTÉ News and Current Affairs output across RTÉ television channels, with a notable increase in the level of 15-34 year olds watching the *Nine O'Clock News* in particular.

Supporting the National Public Covid Information Campaign

From the outset of the emergency, in addition to comprehensive news coverage from our specialist correspondents, and regional correspondents, RTÉ Communications and Marketing offered extensive support to the national campaign of public information on television, radio, online and on social media. This added to significantly to the overall dissemination level of the information, as did the considerable level of editorial coverage at this time which focussed on empowering citizens with the information that they needed in an accessible way e.g Covid testing demonstration on *Late Late Show*, handwashing demonstrations and quarantine protocols on *Claire Byrne Live*.

Other support messages included the promotion of helpline resources such as Alone on the RTÉ News Now channel, and the 'Stay at Home' and 'Fán Abhaile' on screen messaging on RTÉ One and RTÉ Two throughout. Working with Nasc Ireland, RTÉ produced a series of thirty second ads highlighting Covid advice available in 30 languages –essential advice for all those living in Ireland for whom English is not their first or main language, or who simply want alternatives.

Reaching Younger Adults.

It was identified early on in the crisis, that young adults were likely to prove more resistant to messaging. In response, RTÉ created the 'Create Don't Contaminate' campaign which had high reach and impact with the target group. Engagement statistics for the social media element of this campaign are as below:

- TikTok video views – 6 million
- Instagram stories & grid engagement – 10.7 million
- Facebook video views – 4.6 million

Youth station 2fm played an especially key role in supporting and amplifying this Covid prevention messaging, with presenters from the station not only actively supporting the campaign above, but also through consistent targeted messaging across all programmes.

RTÉ's Role in Reaching the Diaspora

During this time friends and family who could not be in Ireland, had a heightened sense of interest and concern about events, as well as a stronger desire to connect to home. In our overall plans, the needs of the diaspora were also properly considered.

RTÉ's extensive Covid-related output was made widely available, including all national briefings and updates, which were streamed on RTÉ News Now. RTÉ.ie was also widely used by international users during this time. In May alone RTÉ.ie had 4.247m unique visitors from outside of Ireland, generating 17.2m page views.

RTÉ Player is now available for free outside Ireland on desktop, iOS and Android devices. In addition to weekly favourites like *The Late Late Show*, *Nationwide* and *Fair City*, our extensive bespoke Covid-related broadcasts were made available to stream worldwide. Irish audiences around the world were able to watch daily Government updates, News and Current Affairs Reports as well as new shows like *Ireland on Call*, *MayDay: 24 Hours in Lockdown*, *Other Voices Courage* and RTÉ Player Originals like *Marty in the Shed*.

There were 165 countries viewing content on RTÉ Player in May. 558,000 browsers/devices outside of Ireland accessed the RTÉ Player during this period, generating over 3m streams. 280,000 of those were from the UK, and almost one third of all the international streams originated in the UK.

Operational Challenges and Impacts

Even as an essential service, RTÉ has had to adapt or suspend many aspects of its normal operations to comply with public health and occupational safety guidelines. Given the nature of broadcasting, which often takes place in confined spaces and studios, some types of filming became impossible, and others became much more challenging. Examples of the kind of impact on schedules and productions are outlined below:

- Suspension of the popular drama *Fair City* – this is Ireland’s flagship drama series and attracts audiences of over 400,000 each week. The nature of some of the filming environments could not accommodate physical distancing to the degree originally required. On that basis filming has been temporarily stood down and scriptwriters are drafting new storylines in readiness for its return to screens this autumn.
- All external drama commissions have been stood down
- Sports broadcasting - the suspension of all live sporting action resulted in significant gaps within our broadcast schedules. Where possible or relevant, RTÉ endeavoured to make archival sporting events and programmes available to audience to try and compensate for this gap, but this has involved complex negotiations around rights with a number of stakeholders.
- Restricted access of programme contributors – many of our live broadcasts rely on the contribution of a diverse mix of guests in radio and television studios from early morning to late evening. In order to minimise risks, specific protocols were put in place around studio guests and where possible ISDN or satellite links were used as an alternative.
- Albeit on a more restricted basis, as an essential service, broadcasting had to continue; this has required rigorous additional demands as regards the frequent sanitisation of broadcast facilities, the creation of new workflows to try and avoid cross contamination between teams, additional administration in terms of tracing information, and additional technical complexities to broadcasting especially where remote connections were involved.
- As a large employer within the media sector, RTÉ also had to work at speed to enable over 1,000 employees work remotely to continue to deliver critical services.
- RTÉ National Symphony and Concert Orchestra programme of live performances have been stood down. Because of social distancing preparations and rehearsals have also been stood down, but where possible RTÉ Concert orchestra have contributed to a range of programming including the European Broadcasting Union World Music Day performances.

The Impact of Covid-19 on RTÉ Revenues

While we are doing everything we can to minimise the impact, as with all media organisations in Ireland and elsewhere, RTÉ revenues, both commercial and from the TV Licence, have been severely impacted by the Covid-19 crisis.

RTÉ relies on commercial revenue for close to 50% of its income. Since the crisis began there has been a sharp reduction in advertising spend, particularly on television and the outlook for the remainder of the year is very unclear. This decline has affected all media in Ireland and abroad.

RTÉ's licence fee income has also been severely impacted. TV Licence revenue has sharply declined during this period.

With both revenue streams seeing large declines, we are forecasting that total revenue could be reduced by 25% - 35% for the year, which considerably exacerbates the existing financial challenges being faced by the organisation.

Responding to Audience Needs

Over and above critical information, RTÉ identified from the outset that audiences would have a range of different needs during this time, and as a result, notwithstanding filming and recording challenges, created and commissioned a range of bespoke programming which included:

- The daily broadcast of mass on RTÉ News Now
- The special series of *Operation Covid Nation* – a short series which offered practical advice on eating, lifestyle, stress management and coping mechanisms during the Covid restrictions.
- *Ireland on Call* – a six week series which showcased the many ways in which communities across Ireland were innovating and supporting each other to rise to the challenges posed by Covid-19
- *MayDay: A Day in the Life of Lockdown*: a portrait of different lives across Ireland from dawn to dusk during the peak restriction period, attracting an audience of 473,000 viewers. This offered not only a reflection of that moment, but also stands to be an important audiovisual document of this time.
- *Pandemic* – a podcast series which explored the impact of Covid 19 from a scientific, political, public health, social and economic perspective featuring discussion and expert opinion from a diverse range of experts and commentators.
- *You OK?* - a podcast series focussed on mental health wellbeing, covering a range of issues from anxiety, insomnia, parenting, addiction and more.
- *Cook in with Mark Moriarty* – a cookery series intended to offer options and ideas during a time of reduced access to shops and supplies, and reduced income.
- Additional commissioned articles for RTE.ie – articles, advice and expert analysis on all things related to Covid within a dedicated section of the website.
- *Ireland Remembers* – a virtual memorial wall on RTÉ.ie which was also supported by special memorial segments on RTÉ One television and RTÉ Radio One to remember Irish lives during the Covid crisis, at home or abroad.

Drama

RTÉ was able to bring to air the original Irish drama *Normal People*, made by Irish independent production company Element Pictures, adapted from the acclaimed Irish novel by Sally Rooney. This series not only attracted huge audiences, across all ages, but has attracted international acclaim and renewed interest in Ireland, at this critical time for our tourism sector.

The series attracted an average audience of over 350,000 each week, and has drawn over 4 million streams on the RTÉ Player, making it the biggest-ever programme on the RTÉ Player.

In addition to *Normal People*, RTÉ also re-licenced broadcasting rights for popular Irish dramas such as *Pure Mule*, *Bachelors Walk*, *Kilnaskully* and *Love Hate*. These offerings provided a more culturally resonant form of entertainment and escapism than offered by other subscription services and are indicative of the demand that exists for Irish drama if it were available.

These additional elements of editorial output have inevitably incurred additional costs and additional complexity in their production.

Entertainment and Connection

Consistently year, on year, RTÉ's *Late Late Show* is one of the most watched programmes on television. It reflects a unique mix of light entertainment, human interest, debate, culture and humour.

During the Covid-19 pandemic, the programme focussed extensively on trying to create a sense of connection and community as households across the country faced the difficult circumstances of the Covid-19 lockdown.

Notwithstanding the various challenges involved, the programme showcased the best of Irish talent, at home and abroad, and also featured moving and informative interviews with those who were impacted or involved in the Covid crisis in a number of ways. From its dedication to front line workers, to interviews with NPHET members, to musical acts who dedicated their performances to lives impacted or lost, the programme tried to ensure that audiences at home felt less alone, and at times offered a welcome and compelling diversion.

Over and above the hours of entertainment that this programme provided during this particularly acute period, the programme offered an invaluable mechanism of support for Ireland's charitable sector. Over the weeks in question, through its appeals to the public, *The Late Late Show* helped to raise over €6 million Euro for Irish charities and communities including: The Irish Cancer Society, Women's Aid, ISPCC, St Vincent De Paul, Laura Lynn Foundation, Barnardos and the Irish Hospice Foundation.

RTÉ Does Comic Relief

As an additional contribution of support, RTÉ is delighted to partner with Comic Relief and Kite Productions to broadcast the inaugural Irish comic relief; proceeds raised will be directed to the Community Foundation of Ireland, who will distribute proceeds to a range of societal needs, impacted by Covid.

RTÉ Supporting Educational Needs

In response to the closure of schools on a nationwide basis, RTÉ augmented its educational output to meet the needs of students, of all ages, as they grappled with the many challenges of learning outside of school.

RTÉ also acquired broadcast rights to 8 Shakespeare plays from BBC specific to the 2020 and 2021 Junior and Leaving certificate.

In collaboration with independent production company Macalla Teo, within three short weeks, RTÉ brought Home School Hub to air on 30 March. Last week saw the final broadcast of this season after 58 hours of lesson with 560,000 streams on the RTÉ Player.

Over this period RTE's *Home School Hub* created:

- 1.2 million unique page views to date on the RTÉ.ie/learn portal;
- 348 bespoke bilingual activity sheets;
- 58 hours of Irish Sign Language;
- 15 hours of user-generated content and peer-to-peer engagement on RTÉ *Home School Hub Extra*;
- Huge engagement across social media and lots of really great guests.

Given the emerging data about the extent of the 'digital divide' in terms of access to online learning, these broadcasts provided an essential support to families without access to such resources. Above all, RTÉ Home School Hub helped children and families feel supported and connected during particularly challenging circumstances.

RTÉ's *Home School Hub* drew to a close on 19 June with a finale which included a special graduation concert featuring the RTÉ Concert Orchestra, and personal messages from President Higgins, and Bono, among others.

RTÉ Support of the Arts in Ireland

RTÉ gives support and amplification to the creative sector in a number of different ways:

- Editorial coverage and discussion on a wide range of output e.g. *Today with Sarah McInerney*, *Arena* (nightly arts programme broadcast 52 weeks a year), *Nationwide*, *The Book Show*, *The Poetry Programme*, *The Late Late Show*, *Morning Ireland*, ongoing arts coverage from our dedicated Arts Correspondent on RTÉ News, specialist music programmes such as *The Rolling Wave* and *Ceíli House*, and extensive and diverse coverage to external arts activities and debates on RTE.ie/culture.
- In-house and commissioned programmes about arts subjects, thereby adding to the legacy and living arts archive of the country; e.g profile interviews on the *The Works*, feature documentaries such as the recent RTE One two part series *O' Casey in the Estate*.
- Direct arts commissioning e.g. the RTÉ Short Story Competition (in honour of Francis McManus), radio and television original drama commissions, commissioned editorial and new writing for RTE.ie/Culture, newly commissioned traditional music compositions for the *Rolling Wave*, commissioned poetry and weekly new work from a broad range of writers on *Sunday Miscellany*. Commissioning of artists will increase this year through RTÉ's *Shine Your Light* initiative.
- Collaborative co-creation; extending the experience of arts within the community through initiatives, events and partnerships such as *Culture Night* and *Cruinnui na N'Og*, *Wexford International Opera Festival*, *An Post National Book Awards*.

RTÉ Arts during Covid

These same guiding principles also shaped our response to the support of the arts community during the Covid crisis. In recognition of the hugely important value of arts experience within the national culture, every effort was made to ensure that our promotion and connection with arts was upheld throughout this time. Specific initiatives included:

- The streaming of *Dear Ireland* on RTÉ Player – a collection of theatrical postcards created during the COVID-19 pandemic, produced by the Abbey Theatre, and showcasing the cream of contemporary writers and actors.
- The commissioning of *Lockdown Letters*; a series of short films, each featuring a letter from one person to another, a reflection on an aspect of the Covid experience.
- Arts features on RTE.ie/Culture showcasing arts initiatives and performances across the country also attracted huge engagement - there were 503,000 unique visitors in May 2020, 82% higher than May 2019
- The creation of *Shine Your Light* in which households across the country, and in partnership with the Department of Foreign Affairs, across the globe, were invited to 'shine your light' in honour of those most challenged by Covid, with commissioned poetry from Paula Meehan, and a memorable performance from Sinéad O'Connor. This would be reflective of RTÉ's commitment to value the power of the arts in creating moments of national significance and understanding. Audiences at home and abroad responded in huge numbers with 716,000 viewers turning into the special broadcast on RTÉ One, the event trended Number 1 on Twitter that night, and attracted 1.34 million post views on Facebook.

- The broadcasting and streaming of *Courage*, a series of intimate performances from some of Ireland's most talented musical performers, recorded in major cultural institutions across the country. Over one million viewers worldwide watched these performances. *We wanted to bring musicians together to play music for people that would give a salve and a succour and good heart and give us the courage to deal with the loss and the grief and isolation and also courage to face the future.* (Philip King, Producer).

It has been widely acknowledged that the arts sector has been particularly affected by Covid-19. The loss of income, promotional opportunity, and audience for live performance within the national arts culture has been given extensive coverage across a diverse range of RTÉ programmes over the past number of weeks.

RTÉ also continues to work towards *Shine Your Light 2*, later this summer, which will reflect original creative responses from artists of all genres, to the Covid 19 period and the horizon beyond. There will also be further episodes of *Other Voices: Courage* due to air this summer showcasing a range of emerging and established Irish artists.

Rebooting the Economy and the role of the *RTÉ Supporting the Arts Scheme*

Each year, RTÉ supports many local and national arts events throughout Ireland through media partnerships and widespread cultural content on Radio 1, 2fm, lyric fm, Raíidió na Gaeltachta, RTÉ One and Two, across RTÉ.ie, and via RTÉ Orchestras, Quartet and Choirs. Arts events and achievements of all kinds are featured in RTÉ's News and Current Affairs coverage, much of which is generated from our dedicated Arts and Media Correspondent, Sinéad Crowley.

In addition, RTÉ supports events by offering promotional air-time on RTÉ radio, television, online and social. This airtime has proven vital in allowing events to grow and develop from year to year. Equally, every year, new and exciting arts projects emerge and look to RTÉ to help drive public awareness and attendance.

Through RTÉ Supporting the Arts, RTÉ is privileged to be part of the effort to showcase the wealth of talent, diversity and artistic expression here in Ireland. Ultimately RTÉ Supporting the Arts now supports the arts in Ireland to the level of approximately €1m airtime per annum.

During Covid 19, RTÉ engaged proactively with arts events and cultural institutions who were able to create online or virtual experiences to promote. As the final phases of opening up come into effect, RTÉ Supporting the Arts will play a meaningful role in helping to restore footfall and engagement to these cultural experiences and resources.

Investment in the creative economy: RTÉ and its role in rebooting the creative economy:

RTÉ's financial position not only has impacts in terms of audience experience, but also on the wider independent and creative sector, who rely extensively on RTÉ for commission. RTÉ has statutory obligations to spend a minimum of €40 million with the sector but this may be compromised in 2020 both due to financial challenges and the logistics of production given the various social, distancing regulations. As a result of the decline in its overall revenue, RTÉ is now spending almost 50% less on independent commissioning than it had done in 2008.

As the 2018 BAI Sectoral report confirmed, RTÉ is the largest national investor in the independent sector and in Irish programming.

Figure 15: Total content spend by broadcaster, 2016 (€m)

Broadcaster/platform	2016 content budget	Breakdown of budgets, by source		
		Original	Irish Sport	Acquired
RTÉ	€185m	64%	22%	14%
TG4	€24m	50%	38%	22%
TV3	€55m	48%	16%	36%
Sky	€242m ¹⁸	1%	8%	91% ¹⁹
Virgin Media	€52m	0%	0%	100%
Eir	€21m	0%	24%	76%
Vodafone	€3m	0%	0%	100%

Source: Mediatique, company reports, press and trade estimates

Where data on Irish programming is not available, we have estimated the total UK + Ireland content expenditure and attributed a proportion of this to the Irish market equal to the percentage of customers in Ireland out of the total UK & Ireland customer base

4. Expenditure on original Irish TV content is therefore dominated by the PSBs, led by RTÉ. We now look at each of RTÉ, TG4, Community TV, the pay TV operators and finally new entrants in the context of content expenditure.

Therefore in terms of supporting the creative economy, there is an additional imperative to the restoration of RTÉ funding. RTÉ has honoured all existing contractual arrangements with respective independent production companies, but many of these programmes may not now be made until 2021.

Resumption of Production

RTÉ continues to work with Screen Producers Ireland to develop clear protocols to enable some level of production to resume as soon as possible. This will be greatly welcomed by independent production companies, artists, actors, performers and musicians among many others.