

RED C



Coimisiún
na Meán

Media Nation: Screens, Streams and Airwaves

Exploring Ireland's Media Consumption Habits and
Perspectives on Public Service Media

November 2025

RED C REF 7942-2025

ON AIR

Background to this research

In August 2025, Coimisiún na Meán commissioned RED C Research to **conduct a nationally representative study of media usage and audience attitudes in Ireland**. While the research explores broad patterns of media consumption across television, radio, online, and on-demand platforms, **particular attention is given to Public Service Media (PSM i.e. RTÉ and TG4)**.

This work represents the first phase of a multi-year programme aimed at building a robust evidence base to inform policy and ensure that Irish media services remain relevant and trusted.

The research seeks to **understand how audiences engage with different forms of media and the factors driving shifts from traditional broadcasting to digital and on-demand services**. Crucially, it examines expectations of Irish broadcast media and evaluates satisfaction with PSM, focusing on areas such as diversity, quality, news provision, and cultural representation. It also explores perceptions of RTÉ and TG4's role in Irish society, their independence, and attitudes toward public funding.

The findings will guide subsequent phases of research, enabling deeper exploration of trust, digital relevance, and content preferences for Public Service Media.



Methodological approach: how the research was conducted



An **online** questionnaire was developed based on Coimisiún na Meán's requirements, with an interview length of approximately **20 minutes**.



Nationally representative sample of n=1,009 people aged 18+ living in the Republic of Ireland. **Quota sampling** used to ensure it is representative, with **final data weighted** across key demographic variables based on the latest CSO Census of Population.



Sample is drawn from RED C's own consumer panel, **RED C Live**, which is one of the largest online market research panels in Ireland with over 40,000 members.



The survey includes questions on demographics and socio-economic characteristics, along with **media usage and attitudes**, focussing on TV, radio, online and on-demand habits, expectations of Irish broadcast media, and satisfaction with Public Service Media (RTÉ and TG4)



The survey questionnaire was **piloted** (with cognitive testing) amongst n=50 people online prior to the full launch of fieldwork. The pilot results aligned with expectations, and respondent feedback was largely positive. As no issues were identified, the questionnaire proceeded unchanged to full launch.



Full fieldwork was conducted over a two week period between **Monday 6th and Monday 20th October 2025**.

A note on methodological context and limitations of the research



While this study provides a robust evidence base, it is important to note that results are not directly comparable with other industry benchmarks such as the JNLR, TAM Establishment Survey, or Reuters Digital News Report. Differences in methodology, such as face-to-face versus online data collection, question wording, and survey structure, can lead to variations in reported figures. Timing also matters: research conducted at different points in the year can reflect seasonal shifts in media consumption, and given the rapid evolution of the media sector, data can quickly become outdated. However, despite these differences, these studies appear to reveal similar directional trends in media consumption.

The approach adopted for this research study follows rigorous standards for sampling and data quality, but as with any online panel methodology, certain limitations exist. In particular, it is likely to under-represent non-digital consumers who rely more heavily on linear TV and radio. While this group is relatively small (estimated at around 5-8% of the adult population, primarily older and rural demographics) their perspectives remain important for understanding the full media landscape.

Context: key trends and influences on media consumption



Media consumption in Ireland (and globally) has undergone significant transformation in recent years, driven by technological change and evolving audience expectations. Here are some things we already know.

Decline in linear TV

Traditional scheduled viewing continues to fall, particularly among younger audiences, as streaming and on-demand services dominate.

Rise of streaming and connected devices

SVOD platforms and broadcaster VOD services (e.g., RTÉ Player, TG4 Player) have grown rapidly, supported by widespread adoption of smart TVs and mobile devices.

Growth in on-demand and subscription services

Consumers increasingly value flexibility, ad-free experiences, and access to specific genres or boxsets, driving the popularity of SVOD services like Netflix, Prime and Disney+

Erosion and complexity of trust in media

Trust in media is increasingly complex, challenged by AI-generated content and deepfakes that blur truth, the rise of citizen journalism without verification, and social media platforms prioritising engagement over accuracy. These forces make it harder for audiences to distinguish fact from fiction, amplifying concerns about misinformation and reinforcing the need for transparency and accountability.

Resilience of radio

Despite digital disruption, radio remains widely consumed, maintaining strong daily reach, with ease of access across devices, no subscription fees and a strong local relevance.

Digital and mobile first

Social media and short-form video platforms such as TikTok and Instagram are increasingly central to entertainment and news consumption, especially for younger cohorts.

Generational and technological shifts

While younger audiences favour short-form video and social platforms, older groups stick with traditional sources, creating a widening gap in consumption habits.



The role of Public Service Media amid shifting audience behaviours

Public Service Media in Ireland (RTÉ and TG4) faces both opportunities and challenges in this evolving media landscape. While their digital platforms have grown (and improved), competition from global streaming services and changing audience expectations require continuous innovation in order to keep up.

RTÉ has also been impacted by governance and financial controversies in recent years, which have affected public trust and reinforced perceptions among some audiences of RTÉ as part of “the establishment”.

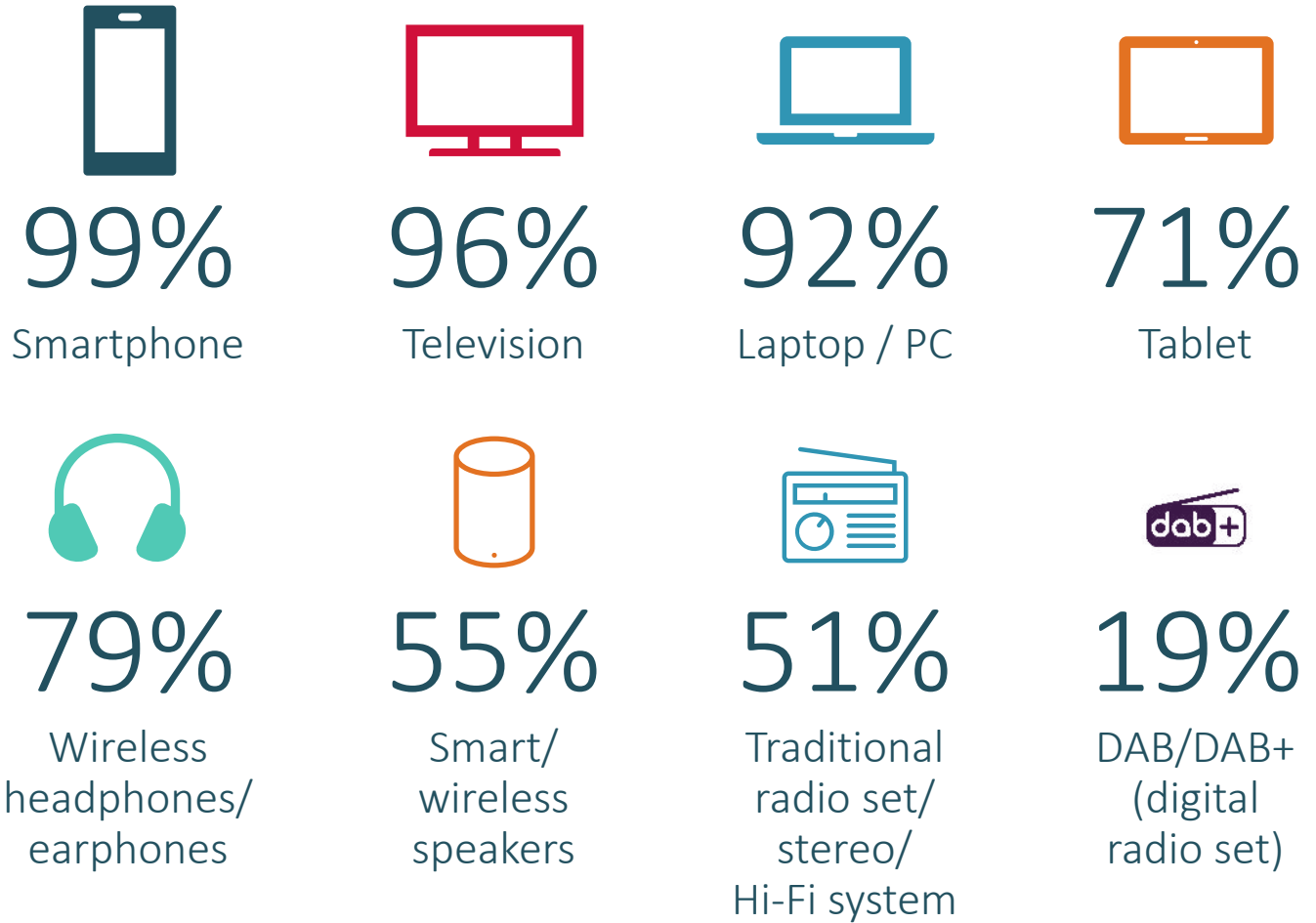
These issues underscore the importance of transparency, cultural relevance, and independence as Public Service Media seeks to maintain its role as a trusted source of news and a promoter of Irish identity in a fragmented media environment.

How Ireland consumes media today: results from the research

Irish media habits are shaped by device access and generational differences. While TV remains dominant, streaming and mobile-first platforms are redefining how audiences engage with content.

Almost everyone has access to a television set in their home, but many also have other devices from which they can view and listen to media content

Number of working devices in household that have been used in the last SIX months (includes devices that might be owned by an employer)
% of all persons aged 18+ living in ROI



NOTE: 90% have access to fixed home broadband in their home (through a landline, fibre, TV or wireless service)

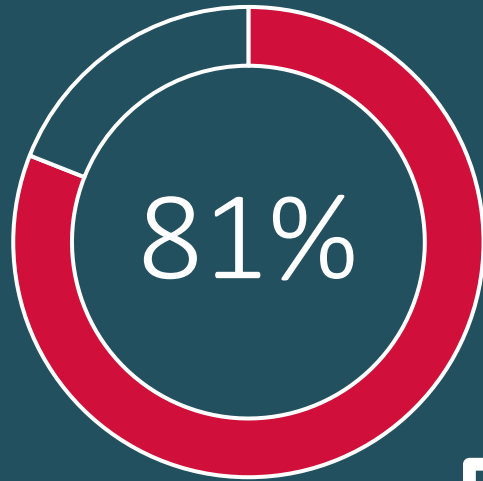
**What are we
watching?**



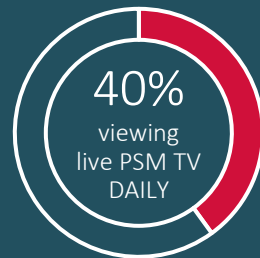
The majority of people are watching live TV at least once a week

% of population viewing live TV

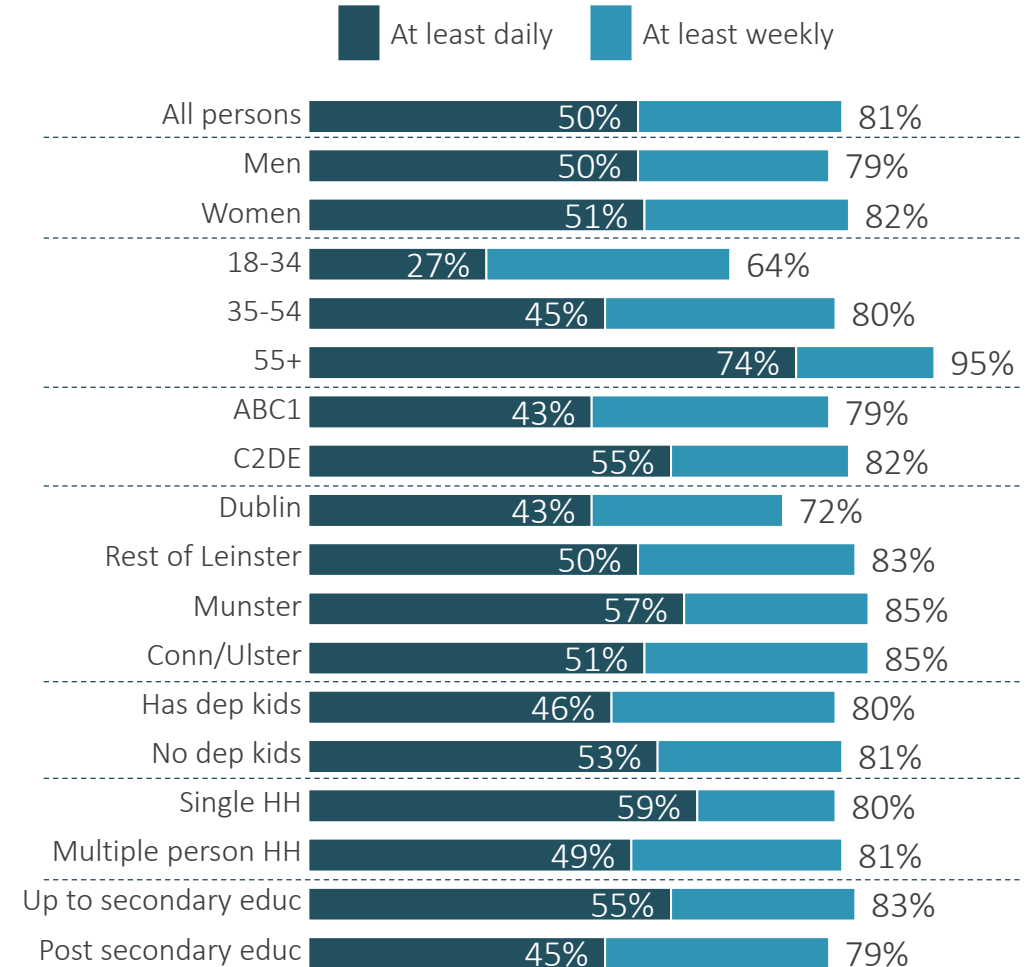
AT LEAST ONCE A WEEK



AT LEAST ONCE A DAY



Age is a key differentiator but it is not the only one, especially when it comes to daily usage where it is higher for lower social grades, those living outside Dublin, people without children, those living in single households and those with lower levels of educational attainment.



Subscription TV services are commonly used, while low (but not insignificant) usage of dodgy-boxes and streaming from unofficial sites



62%

have a paid-for TV subscription

Higher for daily (74%) and weekly (68%) live TV viewers

SAORVIEW

39%

have Saorview

Higher for daily (44%) and weekly (42%) live TV viewers and for those with no paid-for TV subscription (56%)



10%

have a "dodgy box"

Higher for those without a paid-for TV subscription (13%), those aged 18-34 (15%)



9%

streaming from unofficial sites/apps

Higher for those with a dodgy-box (30%)

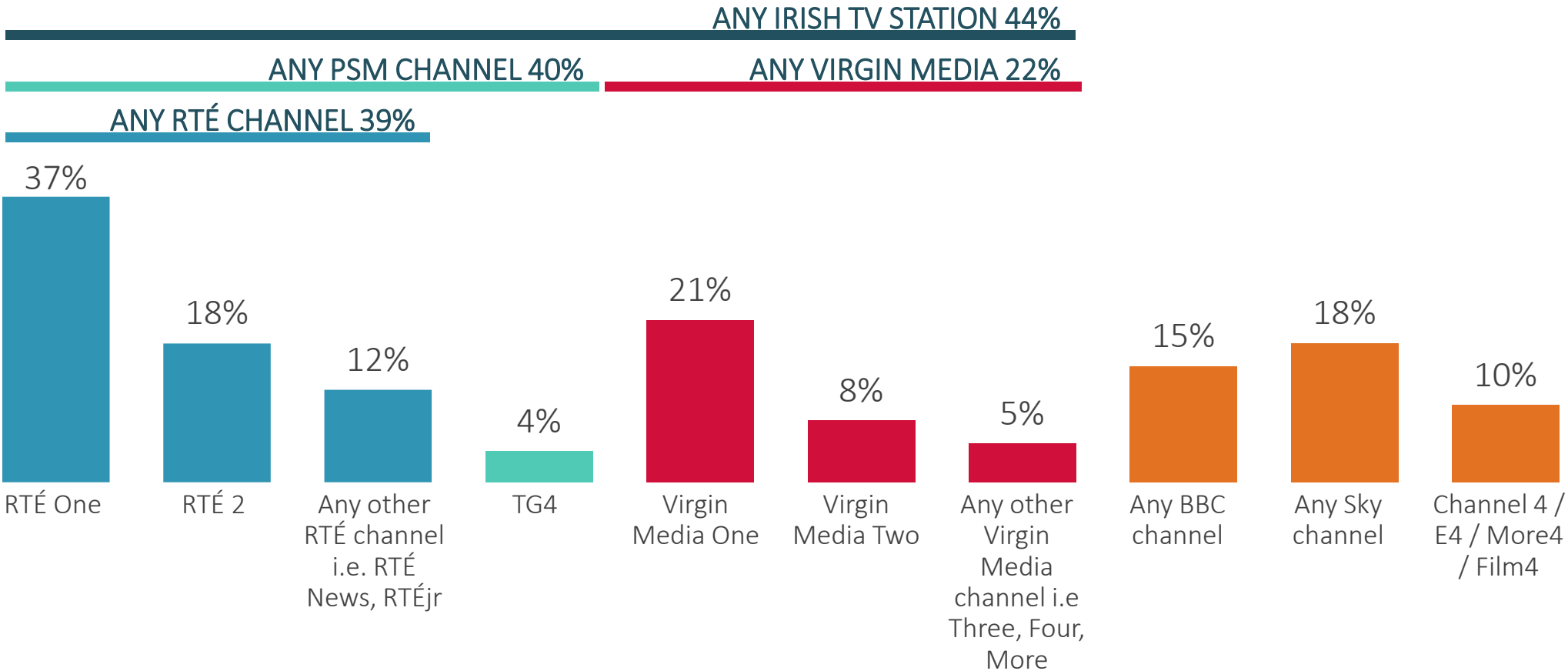
RTÉ One is the most popular live TV channel to watch



PSM channels collectively reach 40% daily, reinforcing their role in Irish media. Virgin stations also command strong daily viewership with more than one-in-five tuning in to them.

DAILY viewing of linear TV channels broadcast in Ireland
% of all person aged 18+ living in ROI; frequency over P12M

50%
watch any of
RTÉ, TG4,
Virgin Media
or UK
broadcast
channels on
a daily basis
over past 12
months



Smart TVs have become especially prevalent, facilitating greater access to streaming platforms and players



64%

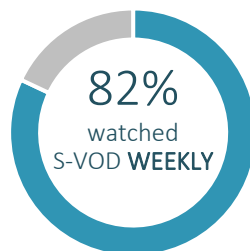
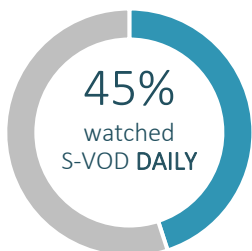
have access to a smart TV that connects to the Internet with or without a device e.g. Chromecast, Fire Stick, DirectTV

Access to smart TV is lower for ...

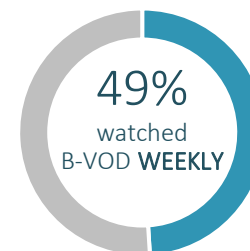
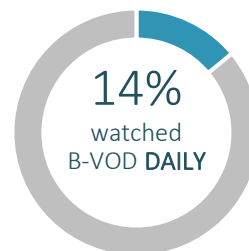
Aged 65+ (54%)
Conn/Ulster region (56%)
DE social grade (55%)
Single person HH (45%)



Frequency of watching subscription video on-demand (S-VOD) services



Frequency of watching broadcast video on-demand (B-VOD) services



Non-regular (at least weekly) TV viewers are more likely to watch S-VOD on a daily (61%) or weekly (91%) basis. In contrast, they are less likely to view B-VOD on a daily (2%) or weekly (14%) basis.

Older age cohorts are more likely to be weekly viewers of B-VOD (54% for 55+), while in contrast they are less likely to be weekly viewers of S-VOD (65%).

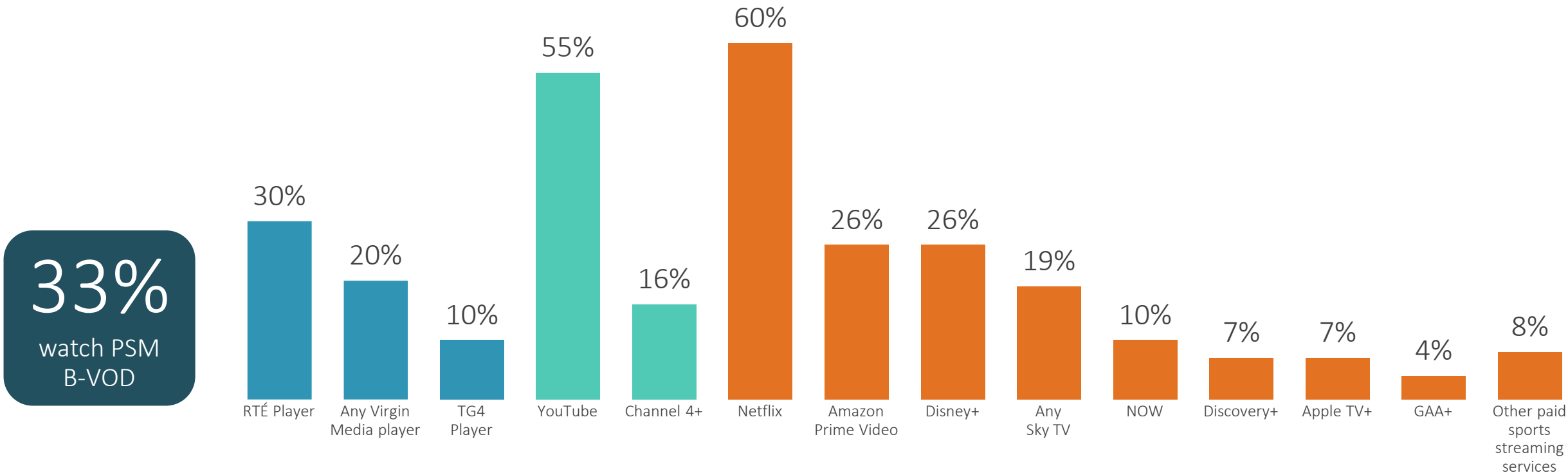
Global streaming dominates, but PSM players retain a role



PSM B-VOD reaches one-third of adults weekly, which is a strong base but far behind global competitors like Netflix and YouTube.

WEEKLY viewing of S-VOD and B-VOD

% of all person aged 18+ living in ROI; frequency over P12M



PSM plays a leading role for reading news online



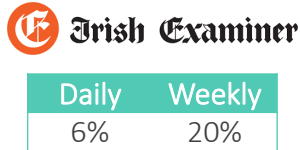
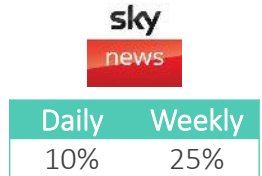
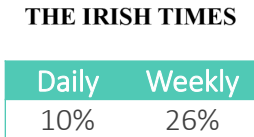
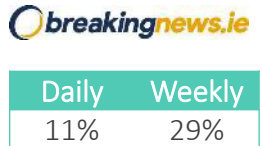
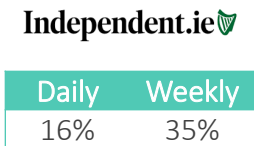
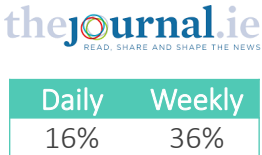
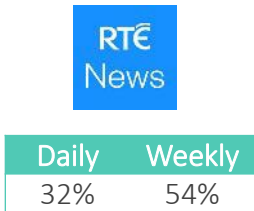
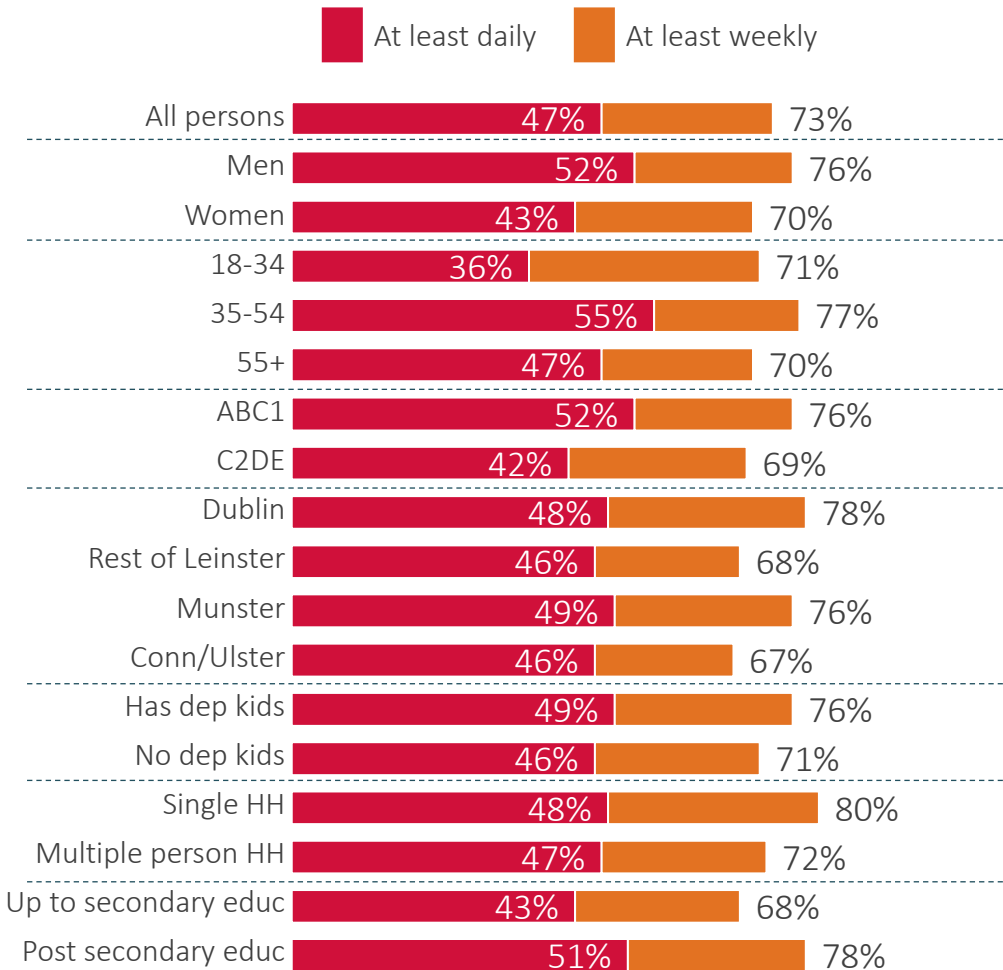
Younger ages aren't as heavy daily consumers for online news sites. Maintaining trust and visibility online is critical as news consumption fragments.

Visiting online news sites

% of all person aged 18+ living in ROI



NOTE: those that are not regular live TV viewers or live radio listeners are less likely to visit online news sites, but they are as likely to be scrolling through social media



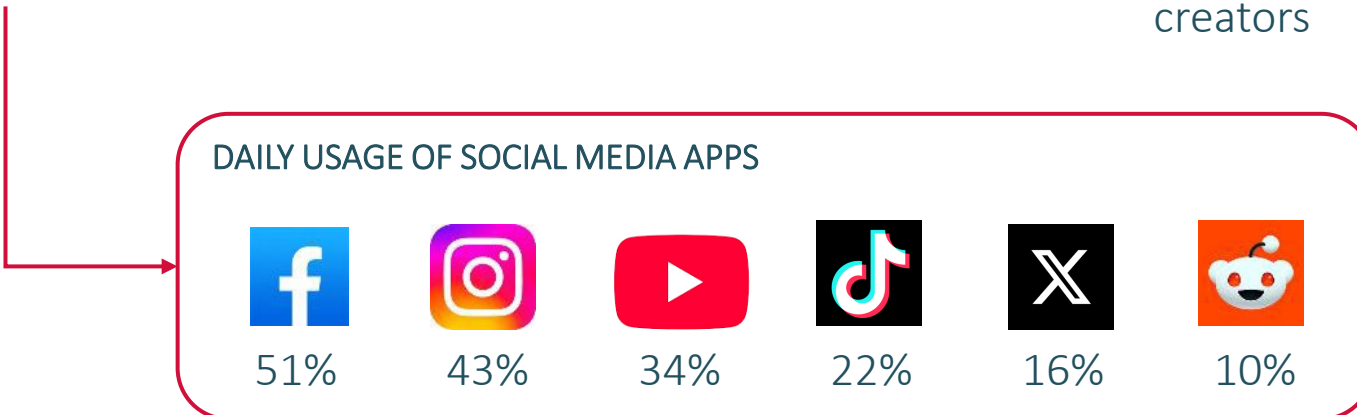
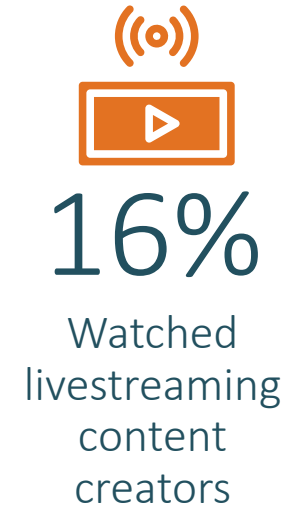
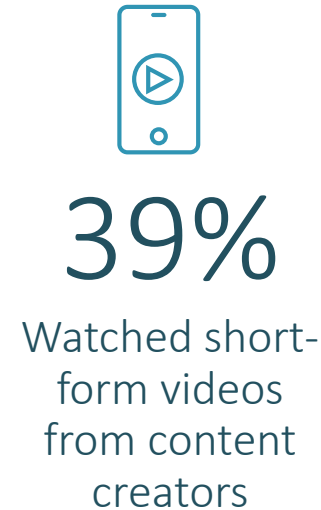
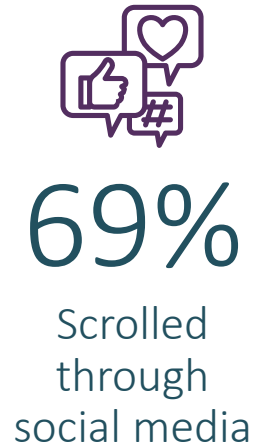
Social media usage underlines need for PSM to be present



Social media dominates daily engagement and this reinforces the need for PSM presence on these platforms. Short-form video (TikTok, Instagram) is a key battleground for younger audiences.

DAILY usage of online social media content

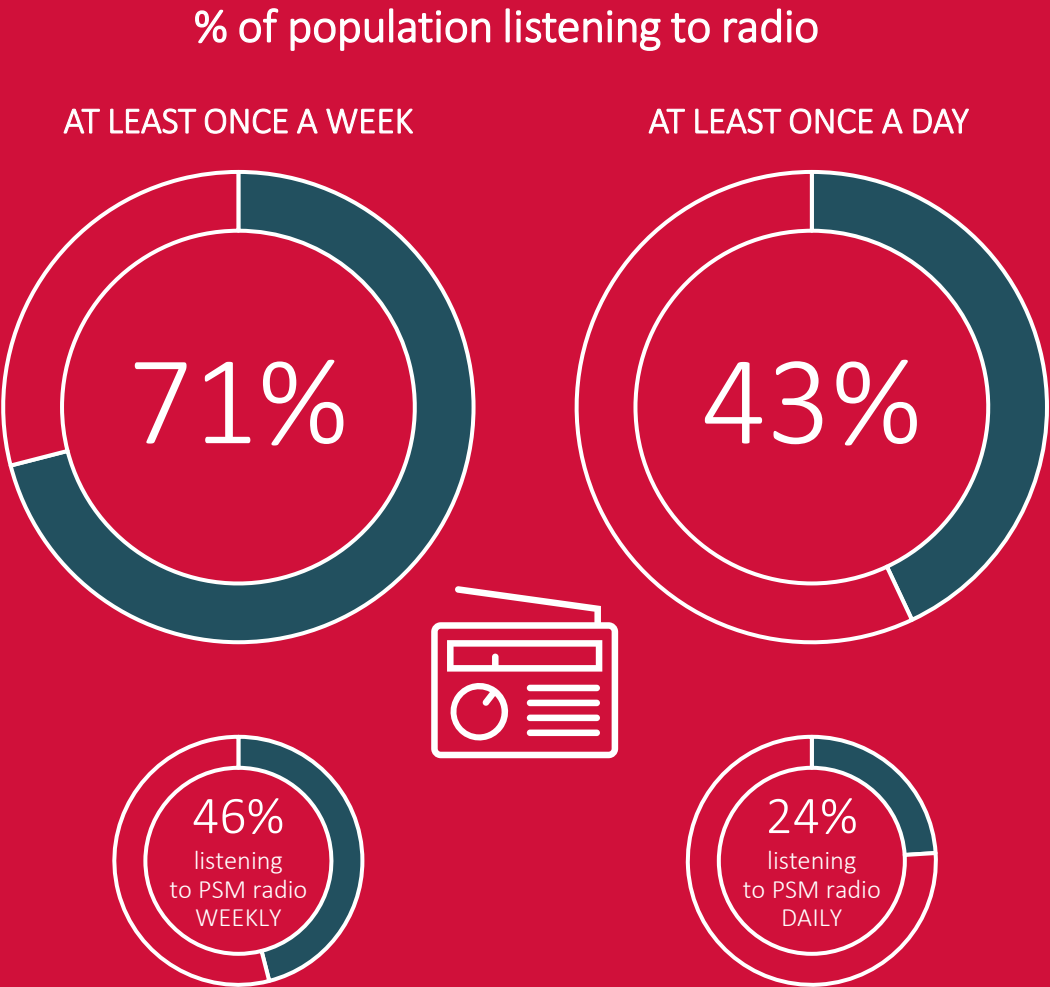
% of all person aged 18+ living in ROI; frequency over P12M



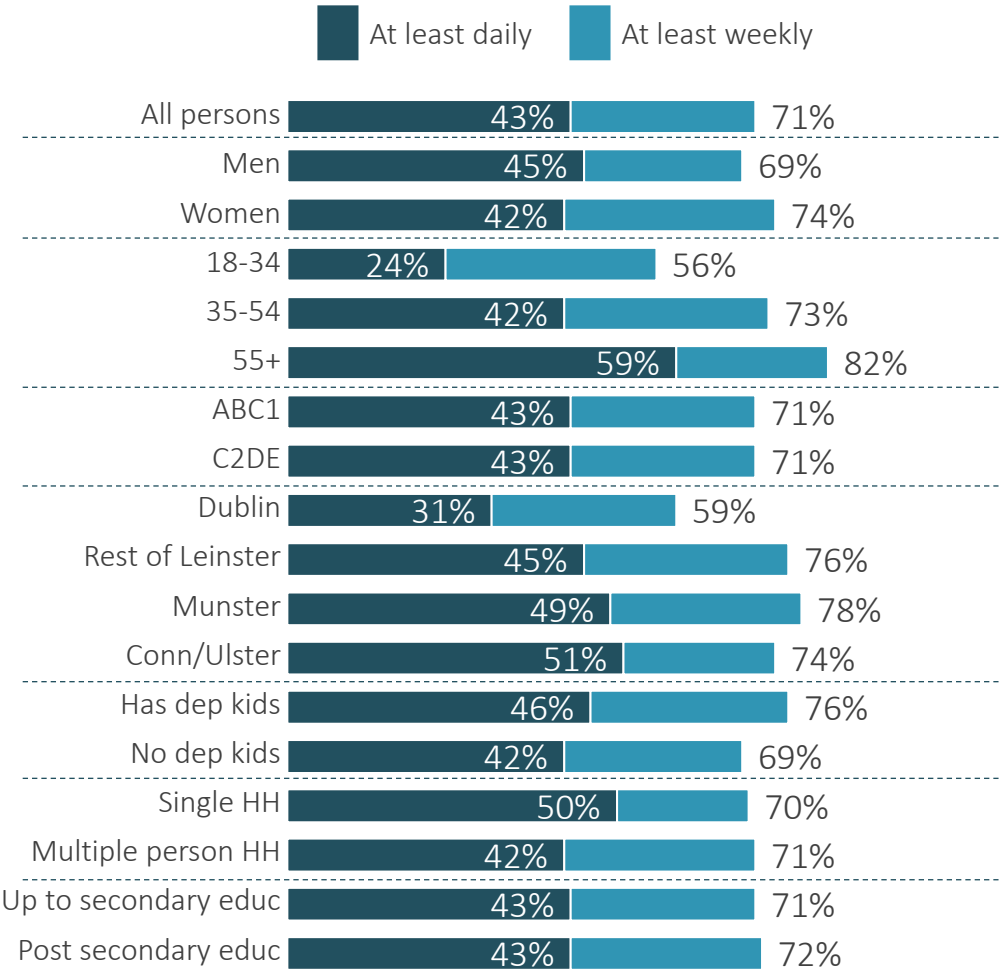
**What are we
listening to?**



Over two-thirds of people listen to live radio at least once a week



Age is also a key differentiator for radio listenership like it is for TV viewing. What is noticeable here is that daily and weekly listenership is considerably lower for those living in Dublin (where they are less likely to own a traditional radio set / stereo) versus other parts of the country.



RTÉ Radio One leads daily listening, but other stations feature

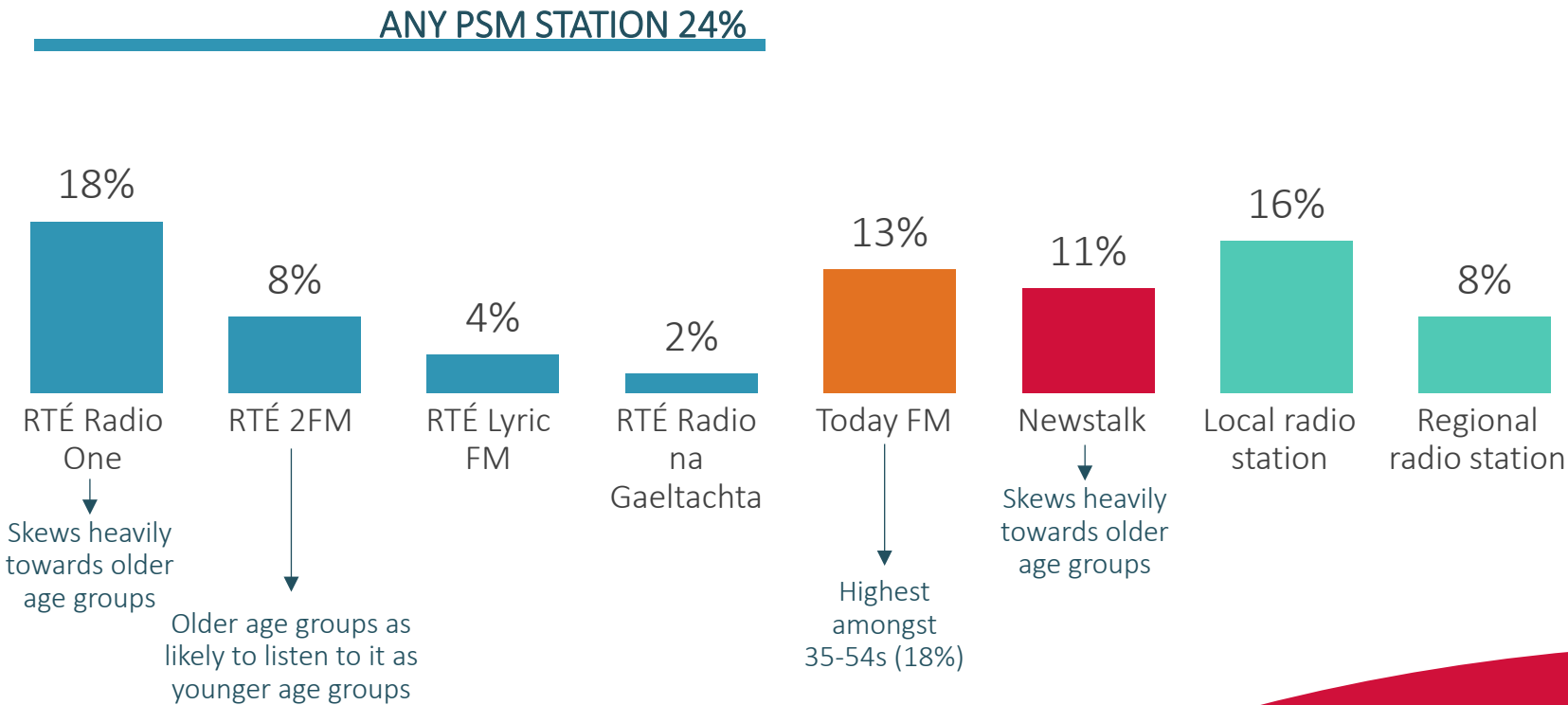


Local and regional radio stations also prove to be popular, reinforcing the importance of community-driven content.

DAILY listenership of radio stations

% of all person aged 18+ living in ROI; frequency over P12M

43%
listen to any
radio at least
daily



Note that 34% of daily radio listeners don't have a traditional radio set / stereo in their household. They could be listening on another device in the household or in the car or at their place of work.

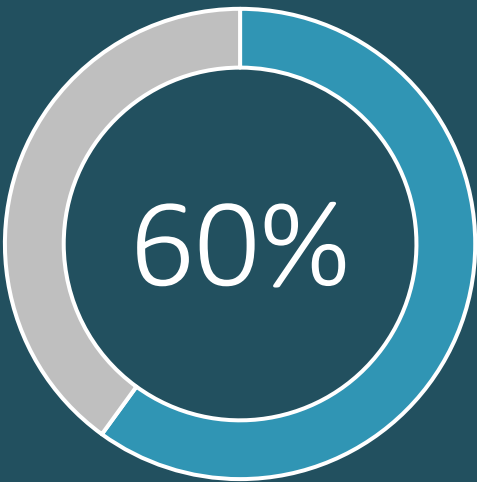
31% of daily radio listeners use a radio player app, while 13% use DAB/DAB+.

Around one-in-three stream audio content on daily basis

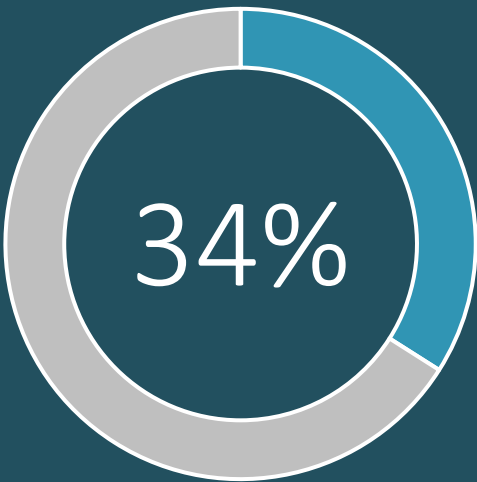
There is a notable social divide here, with streaming of audio content higher for higher social grades and those with higher levels of education. The age divide is notable, with usage considerably lower amongst those aged 55+ versus other age cohorts.

% of population streaming audio content

AT LEAST ONCE A WEEK



AT LEAST ONCE A DAY



All persons	56%	40%
Men	60%	43%
Women	51%	37%
18-34	79%	57%
35-54	62%	48%
55+	31%	18%
ABC1	63%	50%
C2DE	48%	30%
Dublin	66%	51%
Rest of Leinster	50%	34%
Munster	52%	38%
Conn/Ulster	55%	36%
Has dep kids	63%	46%
No dep kids	52%	36%
Single HH	42%	29%
Multiple person HH	58%	42%
Up to secondary educ	47%	30%
Post secondary educ	65%	50%

Spotify and YouTube most popular for streaming audio



These services tend to dominate the platform landscape. PSM needs to make sure it is maximising its reach through YouTube and Spotify.

Streaming music and audio content

% of population that use service in their household



55%

Spotify



48%

Youtube
(music or
podcasts)



18%

Radio
player app



17%

Social media
platforms for
music/audio



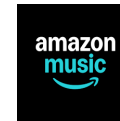
15%

Podcasts via
dedicated
apps



9%

DAB/DAB+
(digital radio)



6%

Amazon
music



5%

Apple
music

How the Irish public feel about Irish Broadcast Media (and PSM)

Broadcast media (and PSM in particular) faces a trust and relevance challenge. While many value news and cultural content, expectations around diversity, quality, and independence are evolving rapidly.

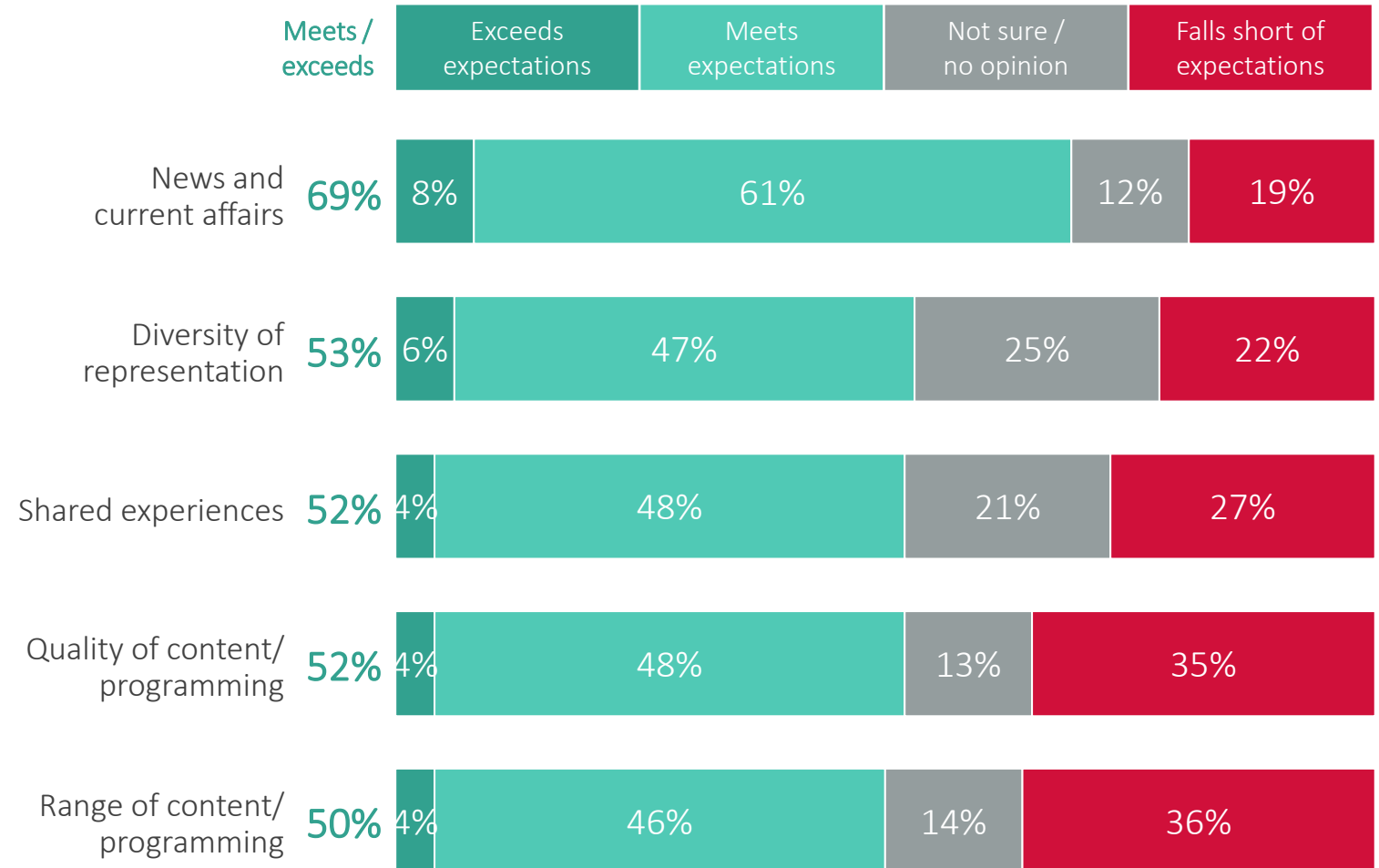
News and current affairs is the area where Irish broadcast services perform better relative to other areas

For some however, quality and range are two areas where Irish broadcasting falls short. A higher proportion has no opinion in relation to diversity



Expectations of Irish Broadcast Services in general

% of all person aged 18+ living in ROI



For regular TV viewers, PSM less likely to be seen as innovative

PSM does stand out on having content easily accessible, good educational content and good family viewing. Trust and inclusivity/diversity seems to be a challenge for both RTÉ One and Virgin Media One.

Image associations for TV channels amongst REGULAR TV viewers

Base: regular (at least weekly) TV viewers; n=411

 MORE likely to be associated with

 LESS likely to be associated with



	RTÉ One	RTÉ 2	TG4	Virgin Media One	Virgin Media Two	Virgin Media Three/Four/More	Don't know	None of these
Offers high quality content								
Makes content easily accessible								
Innovative and looks towards the future								
Provides content in line with my values								
Entertaining								
Provides good educational content								
Relevant to people like me								
Programming is inclusive or diverse								
A leader in original programming								
Is trustworthy								
Good for family viewing								
Has something for everyone								

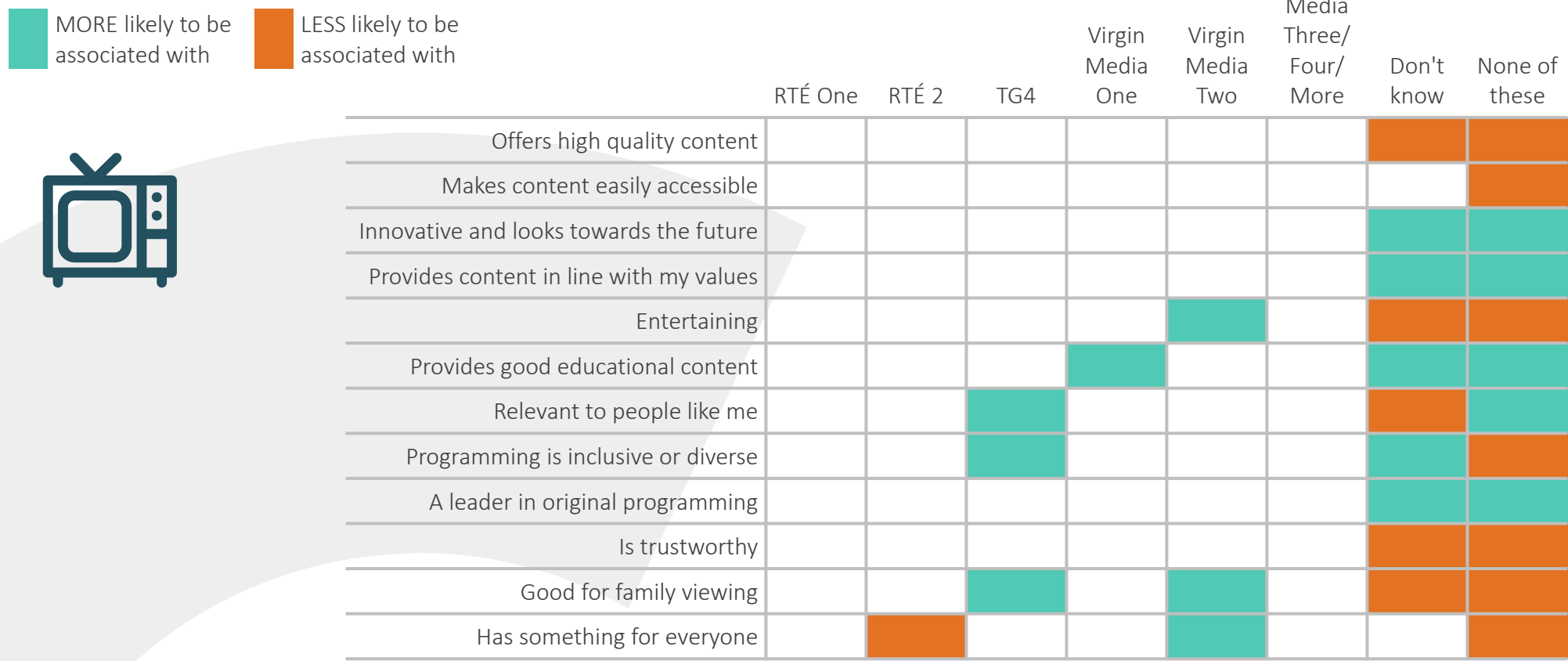
NOTE: PSM and Virgin channels seen to be more/less likely associated with same attributes

Non-regular TV viewers have few image associations with PSM

Because they are not regular TV viewers, it is difficult for them to form any strong associations (positive or negative) with how PSM and Virgin Media performs.

Image associations for TV channels amongst NON-REGULAR TV viewers

Base: not regular (less than weekly) TV viewers; n=94



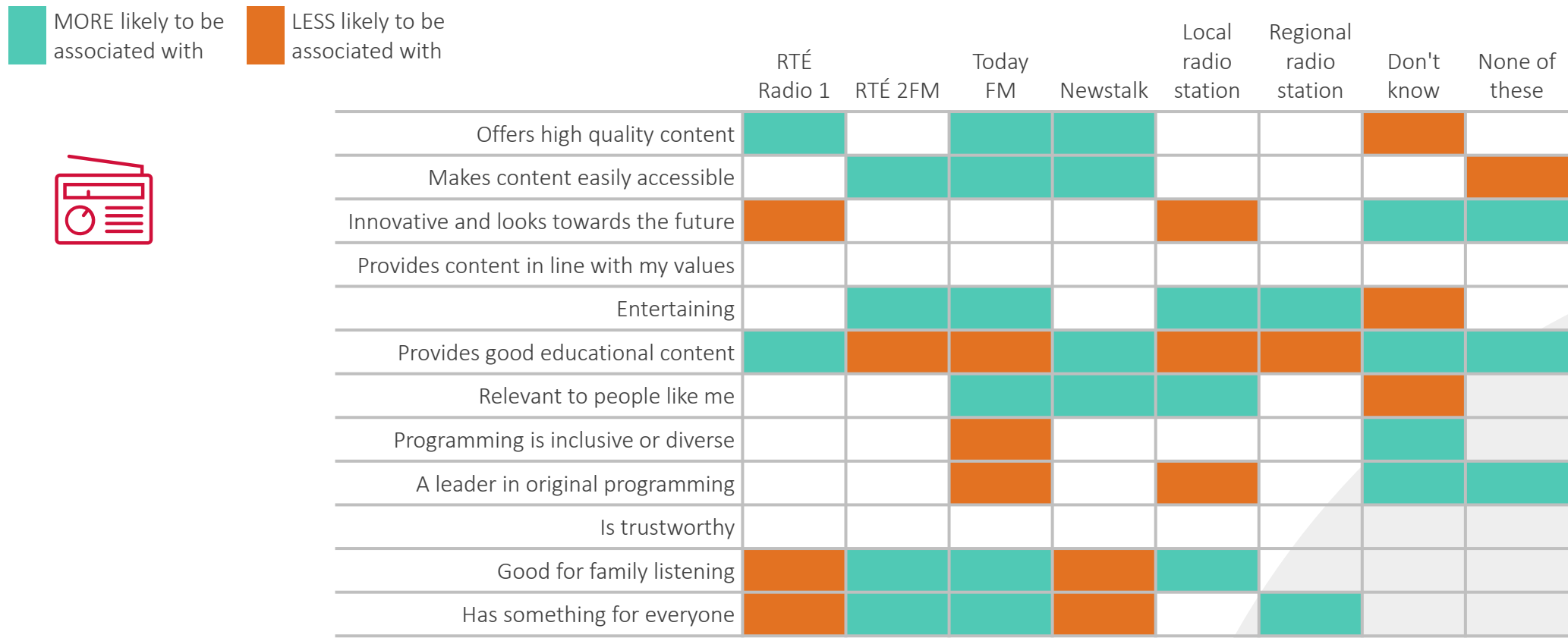
Innovation also an issue for PSM with regular radio listeners



Similar to TV viewers, inclusivity/diversity is not something that any station stands out on (listeners just don't know), while leadership in original programming also seems to be a challenge.

Image associations for radio stations amongst REGULAR radio listeners

Base: regular (weekly) radio listeners; n=353

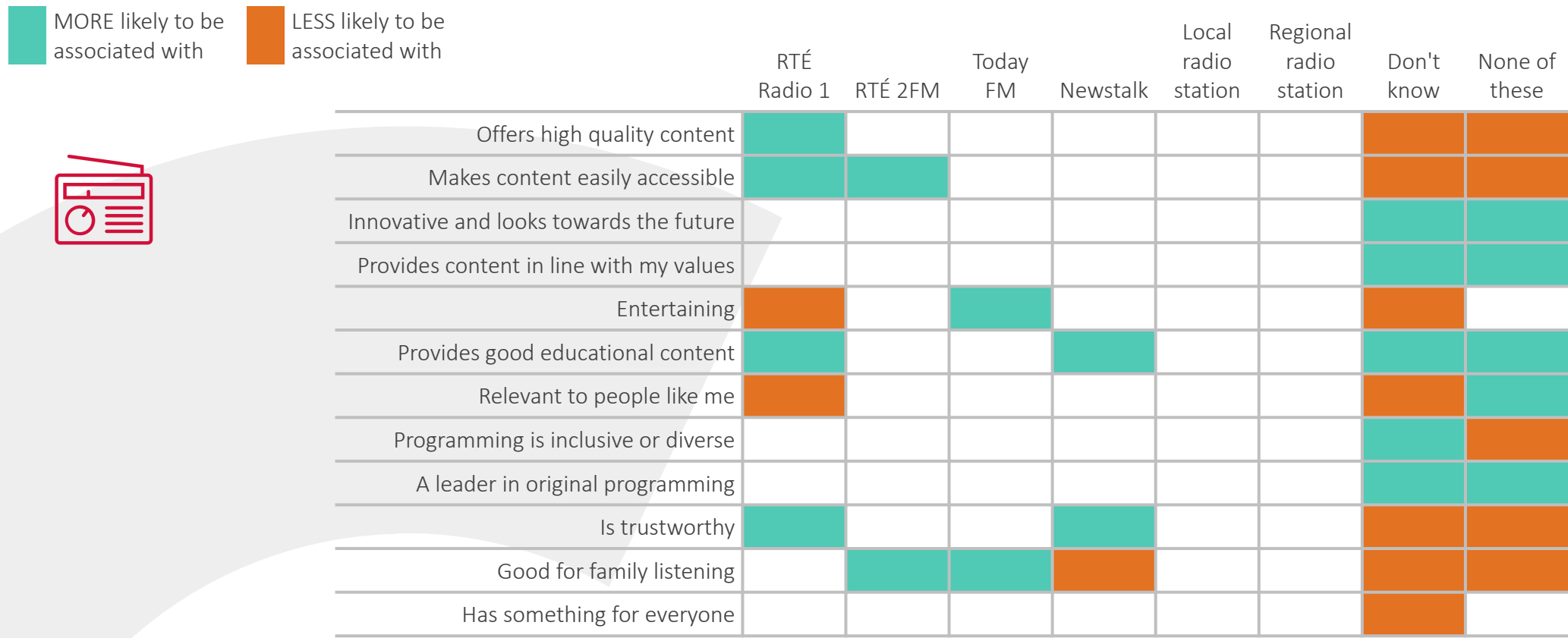


PSM still has positive associations for non-regular radio listeners

Non-regular listeners have fewer strong opinions overall, but when they do, PSM is linked to trust and quality.

Image associations for radio stations amongst NON-REGULAR radio listeners

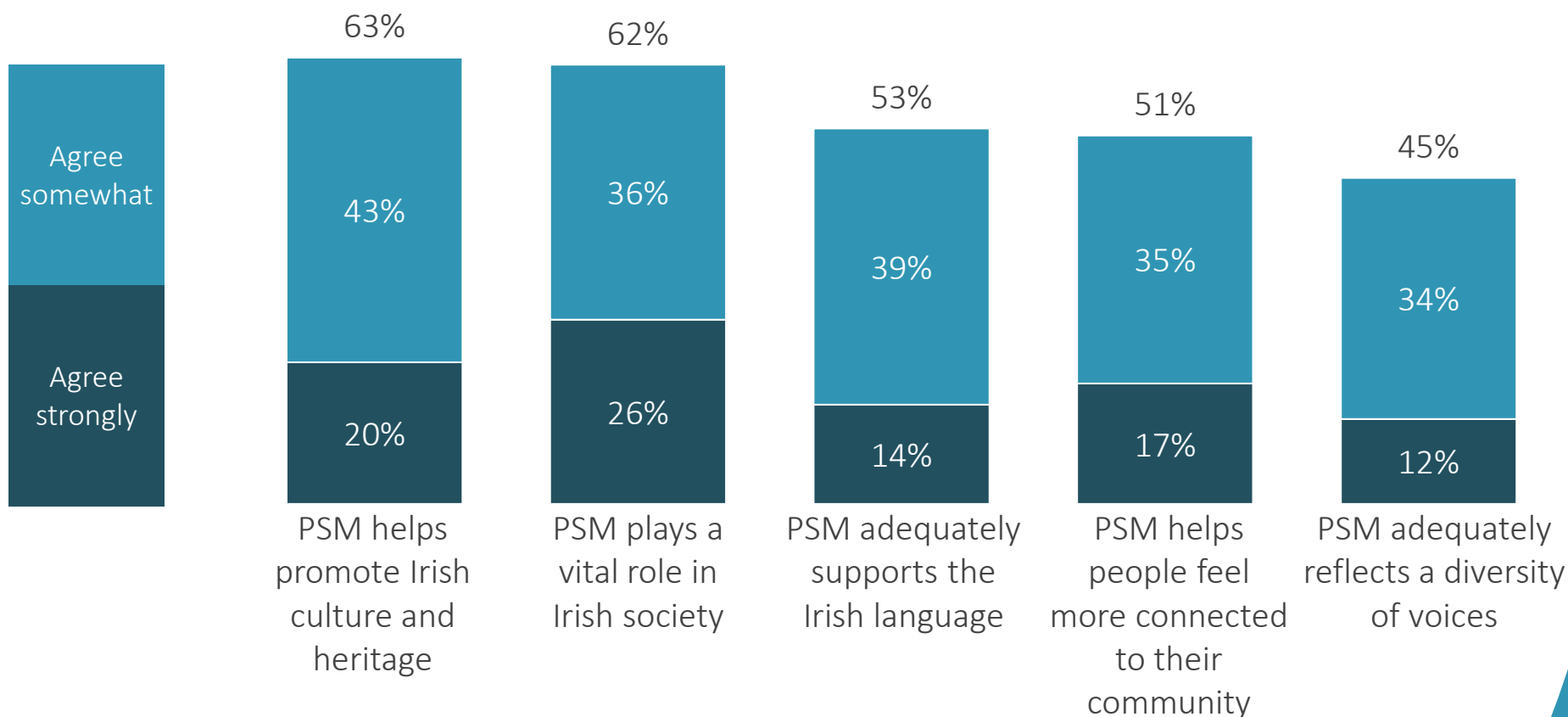
Base: non-regular (less than weekly) radio listeners; n=151



Two-thirds agree PSM promotes Irish culture and plays a vital role, but fewer than half see it as reflecting diverse voices

Views on the role of Public Service Media (RTÉ and TG4) in Ireland

% of all person aged 18+ living in ROI

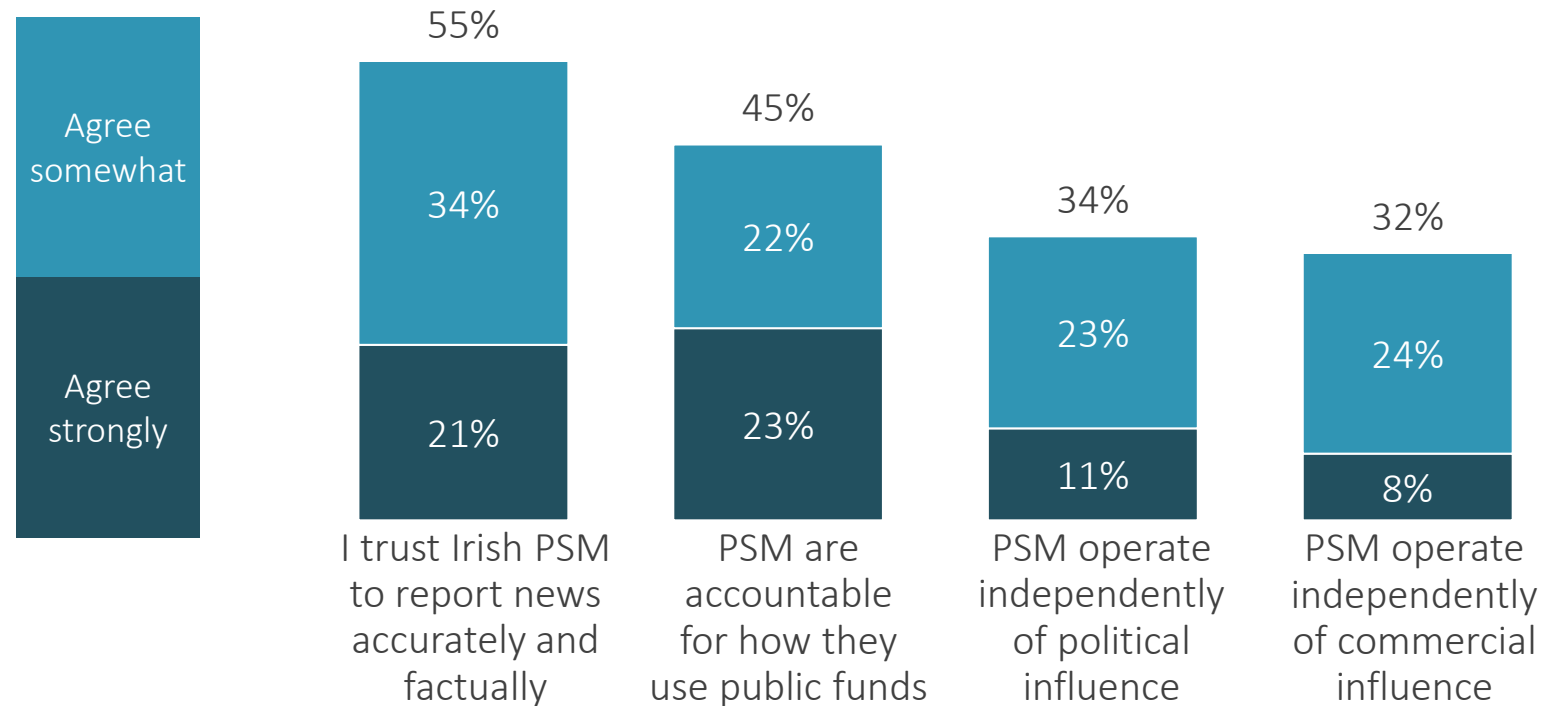


Irish audiences generally recognise the important societal role of PSM. However, fewer than half believe PSM adequately reflects a diversity of voices, highlighting an opportunity to strengthen inclusivity and representation.

Trust and independence: a critical challenge for PSM

While just over half trust Irish PSM to report news accurately, confidence in independence is weaker. These perceptions underline the need amongst the general public for greater transparency and demonstrable independence to maintain trust in an era of heightened scrutiny.

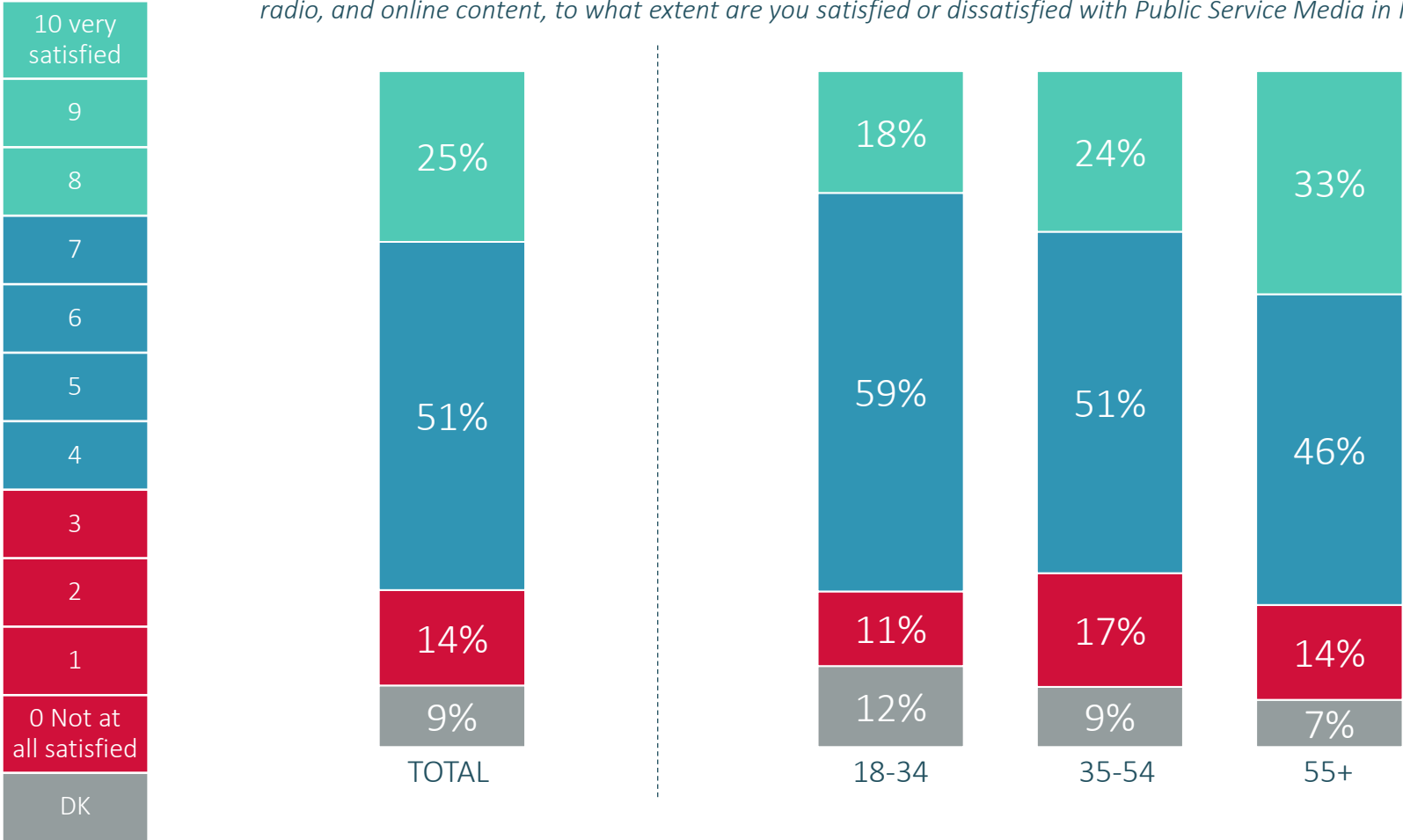
Views on Public Service Media (RTÉ and TG4) in Ireland and trust, independence and accountability
% of all person aged 18+ living in ROI



With one-in-four generally satisfied with PSM, levels of dissatisfaction are not particularly high



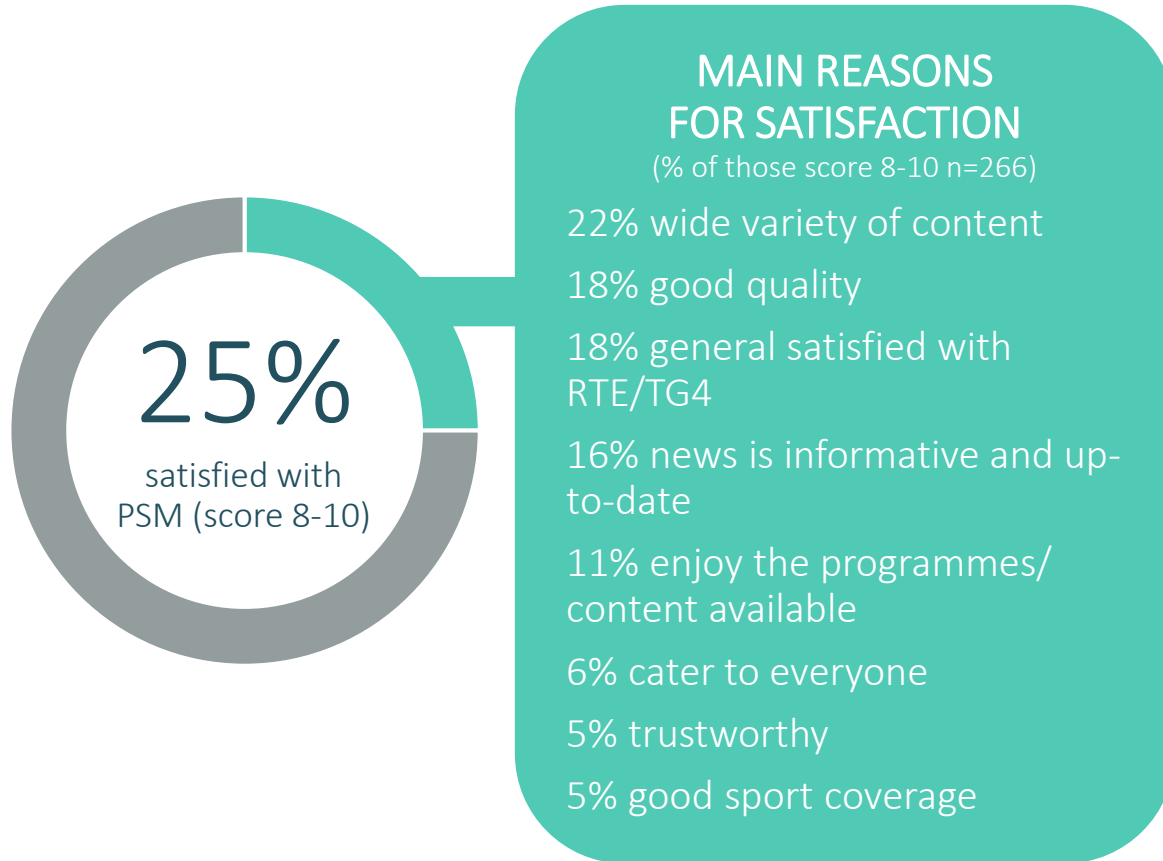
Now, we want to hear your opinions on Public Service Media in Ireland. Public Service Media in Ireland includes RTÉ and TG4. Thinking about these services together, and considering all elements such as television, radio, and online content, to what extent are you satisfied or dissatisfied with Public Service Media in Ireland?



Variety of content top mention in reasons of satisfaction with PSM

News and current affairs remain a cornerstone of satisfaction, alongside Irish identity and cultural connection.

Understanding satisfaction with PSM



I think that Irish public media is of a very high standard, especially considering the comparatively small size of the country, I especially think that the news and associated informational programming is made to a very high quality

Male, 35-44

I think it delivers a good balance to suit every viewer but we are a nation addicted to the Telly! More Irish produced dramas, movies, comedies please

Male, 45-54

I always find it is an excellent service and offers something to a diverse community

Female, 65+

They always have up to date and relevant Information available

Female, 45-54

A huge range of shows shown and I am very happy with what's available

Male, 25-34

I give this score because Irish Media such as RTE and TG4 provide a sense of Irish National identity. good quality content in their programmes and very good cultural connection with the Irish people. RTE provide excellent news coverage and sports coverage such as Gaelic Games etc., TG4 is excellent for promoting Irish language and culture. They also offer English subtitles which makes it so much easier for Irish non-speakers.

Female, 65+

I think for the most part it is of a good standard, some shows are particularly well done eg the Traitors recently. I find it disappointing when RTE relies on running repeats and I think there is scope for more Irish made drama in particular

Female, 25-34

Perceptions of media bias top reason in dissatisfaction with PSM



Bias in news coverage and lack of variety are key pain points, alongside concerns about outdated programming and poor value for money.

Understanding dissatisfaction with PSM

MAIN REASONS FOR DISSATISFACTION

(% of those score 0-3 n=145)

- 25% biased
- 14% poor quality content
- 14% too many repeats
- 12% boring
- 9% poor value for money
- 8% not enough variety
- 8% selective reporting
- 7% don't enjoy watching
- 5% doesn't cater to everyone
- 5% poor quality presenting
- 5% don't watch it

14%

dissatisfied with
PSM (score 0-3)

TG4 is excellent. Incredible output on such a small budget. But RTE TV and Radio is an absolute disgrace and a waste of taxpayers money. I haven't paid the TV licence for over a decade and will continue to refuse to do so for as long as RTE pushes out biased trash on its "news" coverage and produces dross such as "Traitors" which should be the preserve of commercial TV stations. The sole exception is Lyric FM which is excellent
Male, 35-44

Primarily because their coverage of the war in Gaza is so anti-Israel and they are contributing to the silencing of alternative voices on the matter. I am also very dissatisfied about their "progressive" agenda on LGBTQ+ and the way in which they shove it down our faces.
Male, 65+

These are so outdated and something I never put on. Nothing about these media channels interests me at all
Female, 45-54

Irish content is typically of very low quality, featuring bloated budgets for some low grade news anchors and such. We need to focus more on the sports that happen in this country and make it more available.
Male, 25-34

I feel it does not reach my personal demographic. I rarely watch Public Media Services and would rather watch more diverse and high budget streaming services.
Female, 18-24

I don't think they give balanced views when it comes to news. Quality of programming is poor and there's a lot of repeated and old content shown
Female, 25-34

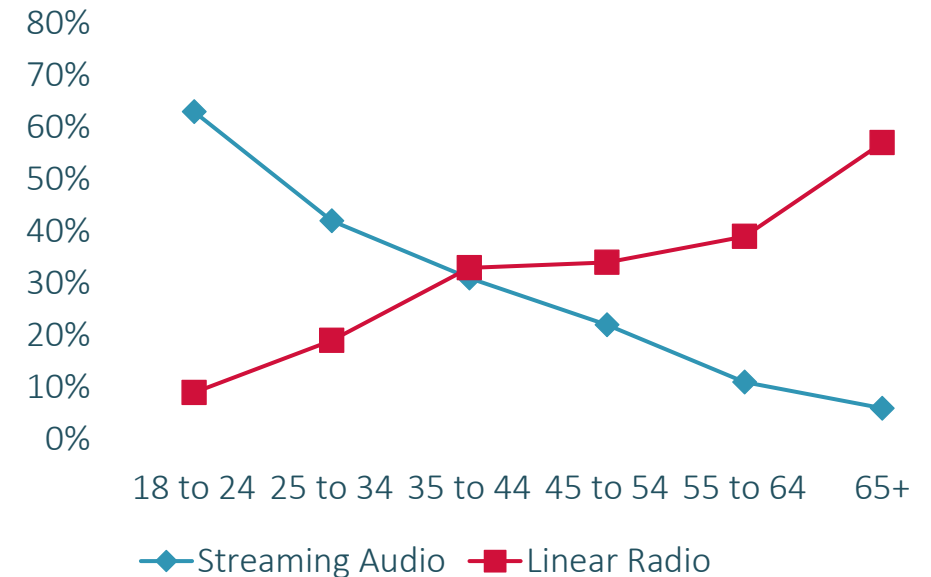
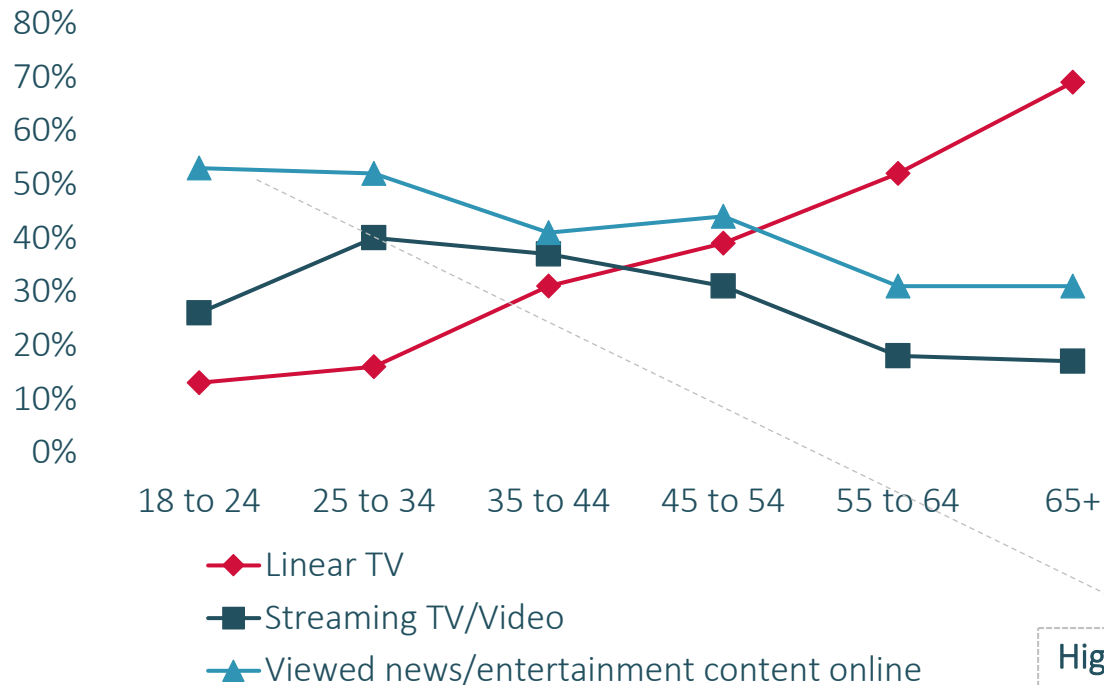
Challenges faced by linear broadcasters

Linear broadcasters risk losing relevance among younger audiences if they don't keep up with how people watch content today. To reach everyone, broadcasters need to show up where younger audiences spend their time i.e. on mobile devices, streaming services, and social media.

There is an on-going generational shift towards on-demand content C

Younger audiences overwhelmingly prefer on demand platforms, while older audiences continue to remain more engaged with linear formats. This trend is evident across both video and audio.

Daily Usage of Streaming Versus Linear Content

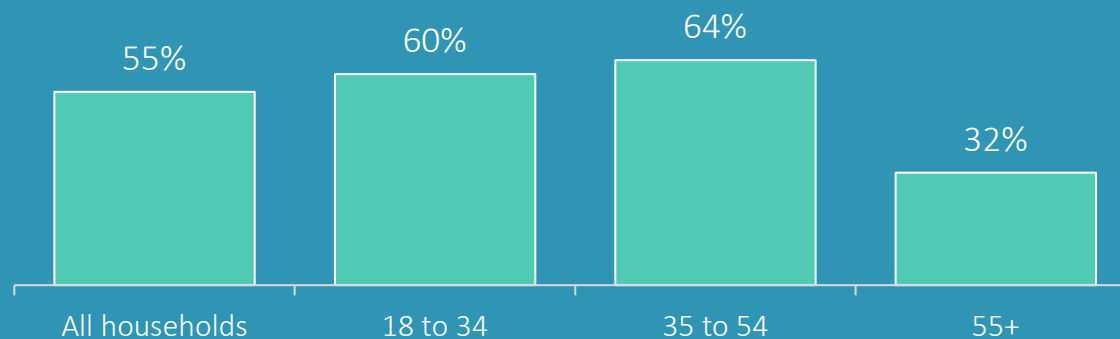
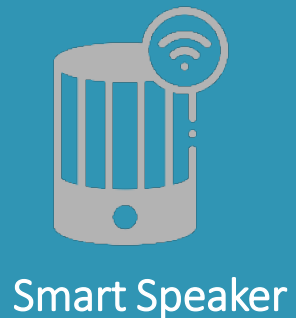
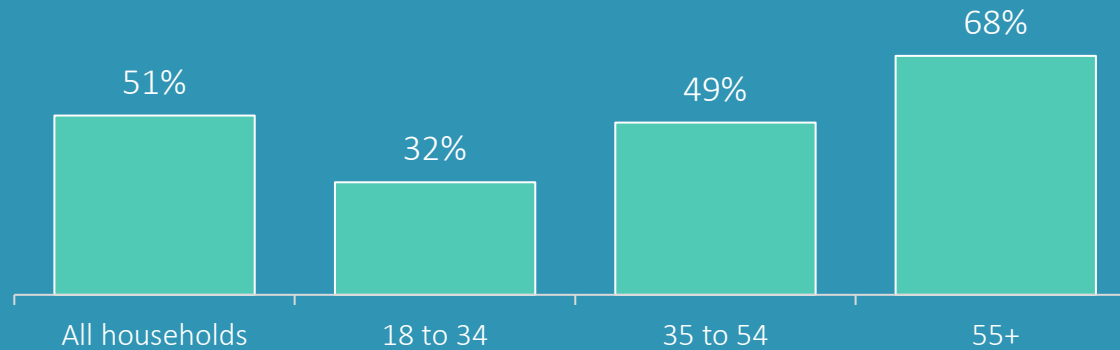


High usage online content use dominated by short-form video (e.g. Tiktok, Instagram reels), and social media usage

Only half of households have a traditional radio, dropping to just 32% among under-34s

This highlights the needs for broadcasters to prioritise digital audio strategies in the future, both making their content easily accessible and mentally available to consumers

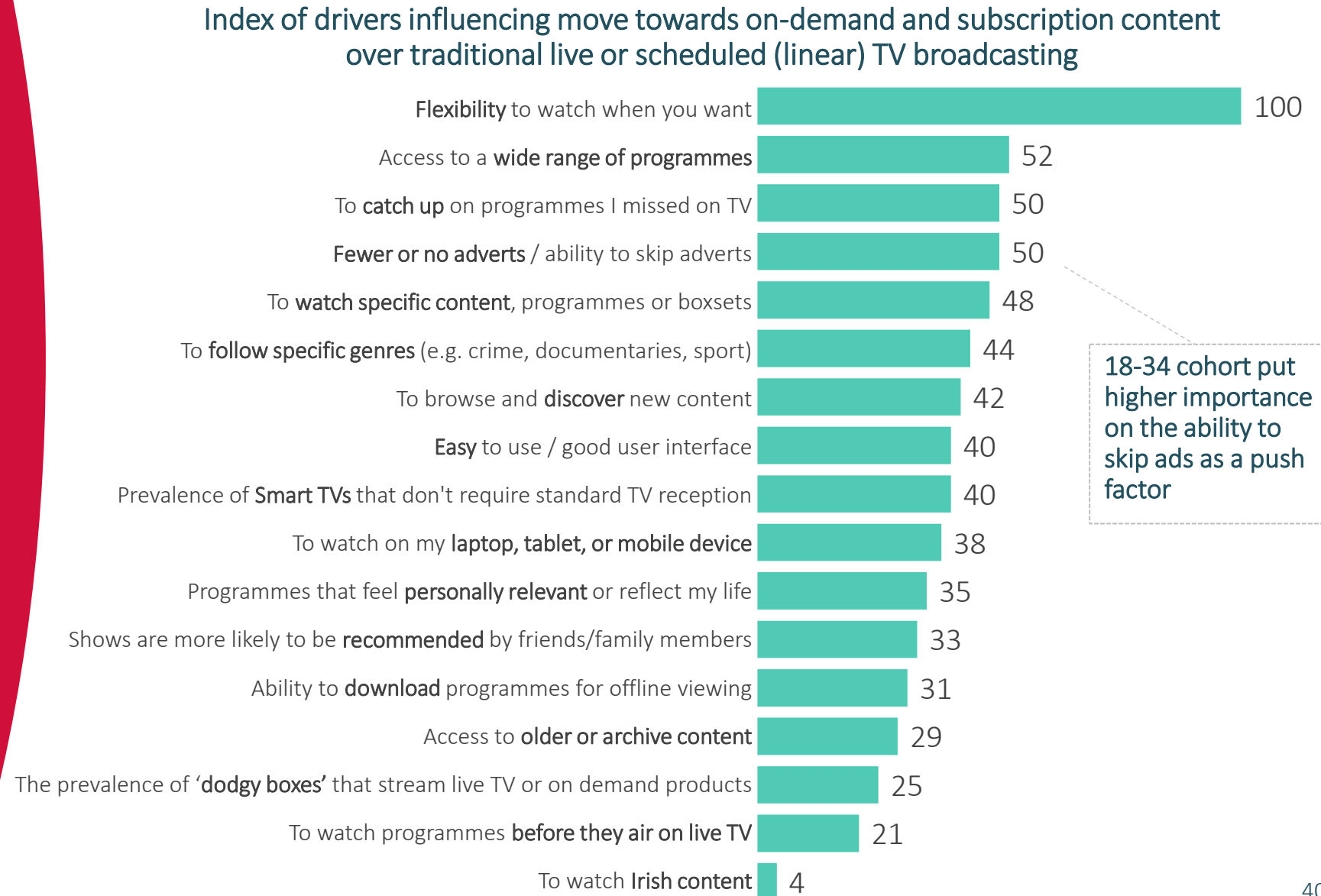
Access to audio devices within the home



The move to linear is predominantly driven by the flexibility to choose what, when and how to watch content

Range and exclusivity of content also plays a significant role, in addition to the ability to skip or avoid ads altogether.

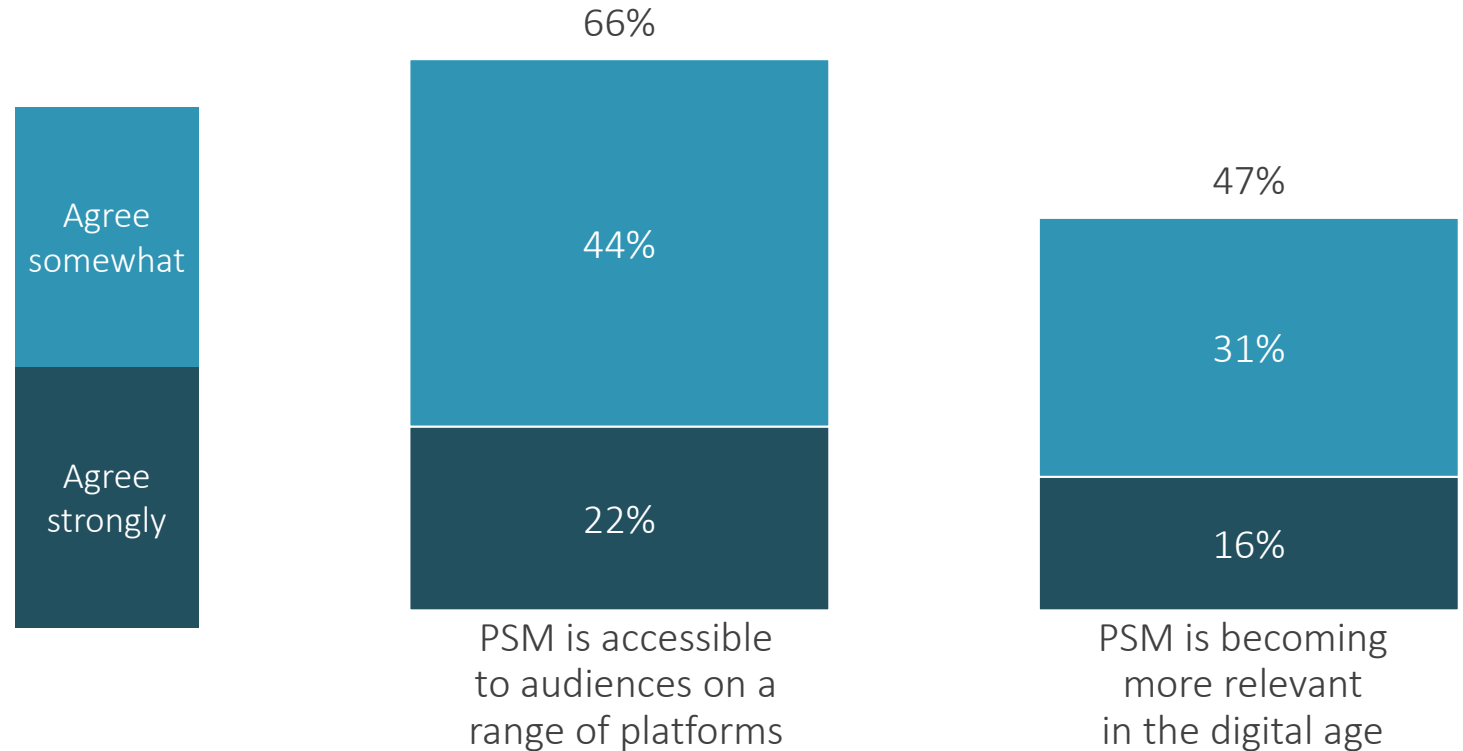
Ultimately broadcasters are extremely challenged to keep up with on demand content, particularly with content driven by international budgets



While there is a continued need to ensure PSM is accessible across a range platforms, a key challenge is how it can maintain relevance in the digital age



Views on Public Service Media (RTÉ and TG4) in Ireland and digital services
% of all person aged 18+ living in ROI

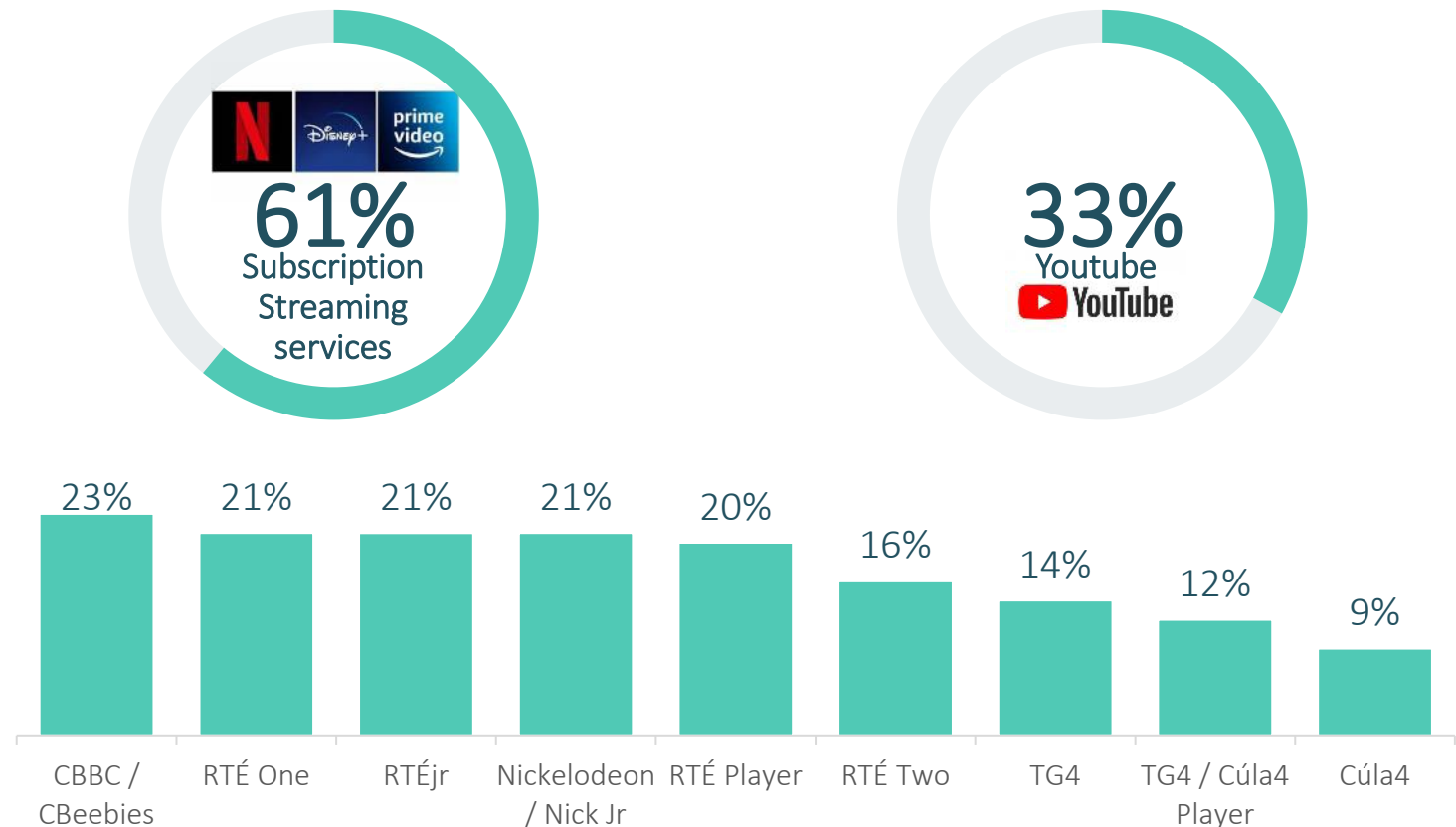


The move away from linear platforms towards on-demand starts at a very early age, with streaming platforms seen by parents to offer a better product for their children

Parents of young children nearly 3x more satisfaction with kids' content on streaming platforms compared to linear TV. YouTube also outperforms traditional broadcasters in satisfaction.

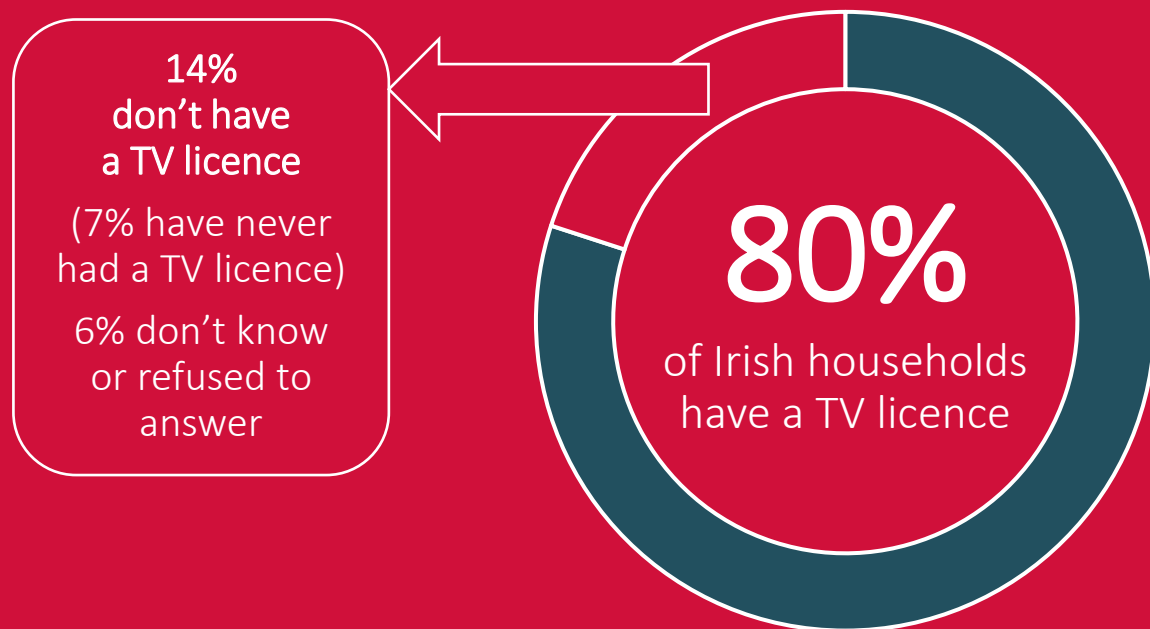


Satisfaction with content for Children's content (Net: 8-10 Satisfaction)
% of parents with children aged 3 to 12



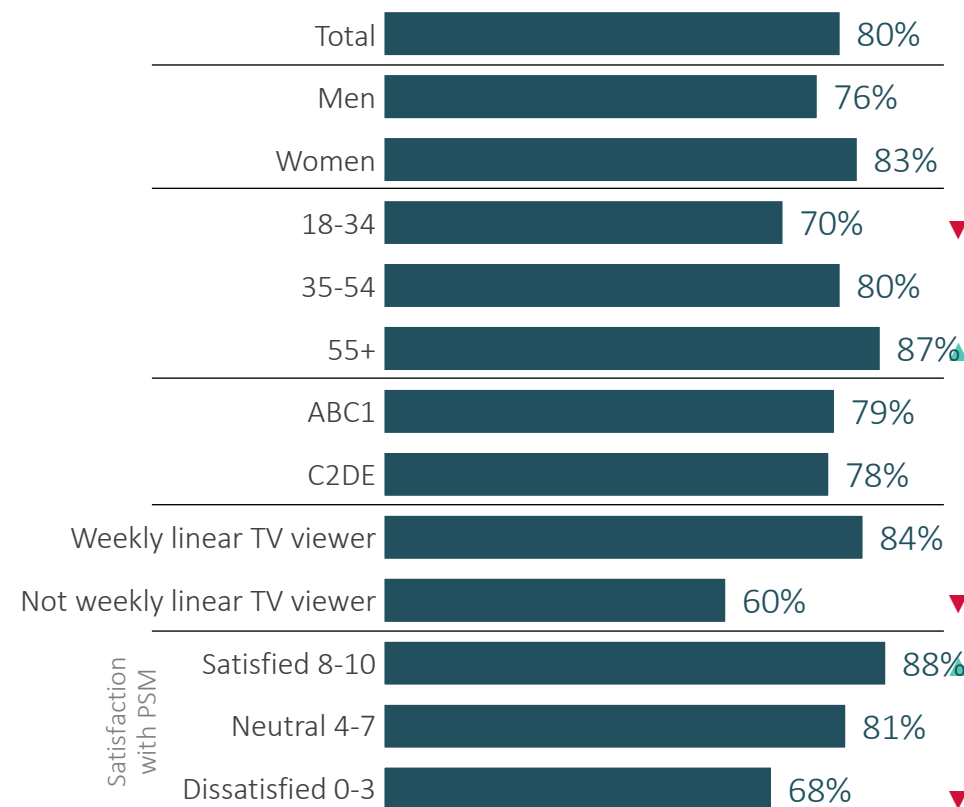
Most Irish people are compliant with paying their TV licence, though 1 in 10 outright refuse

Incidence of having a TV Licence



Young people and those dissatisfied with PSM are less likely to pay their licence fee

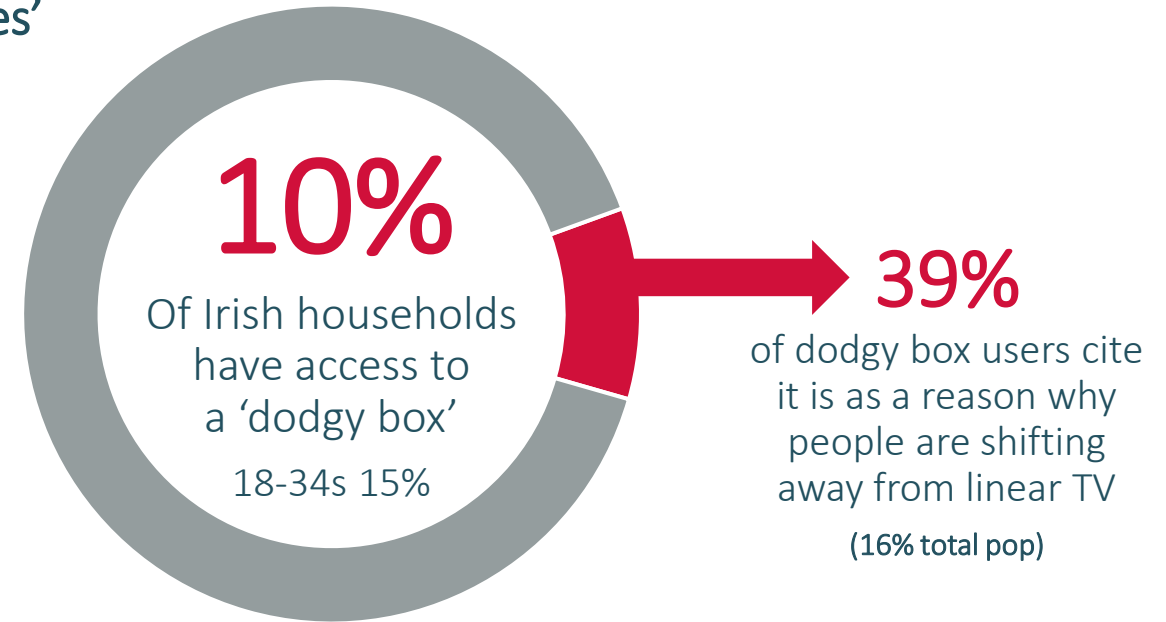
If has TV licence by demographics



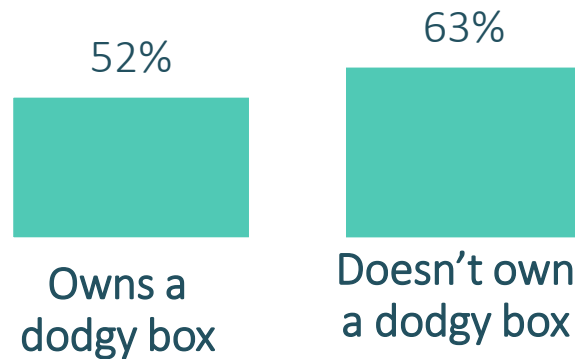
'Dodgy boxes' are being used by a minority (although not insignificant) of Irish households

While the majority of those with dodgy boxes still pay their TV licence, they do so at a lower rate than those who are compliant. Their usage also has a role in incidence of paid TV subscriptions.

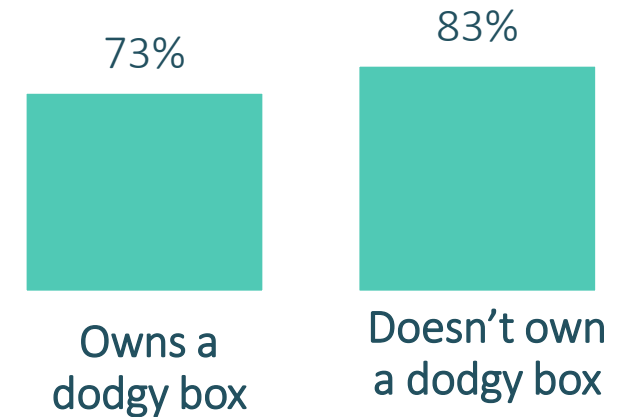
Usage of 'Dodgy boxes'



Has a paid tv subscription



Has a TV Licence



How do
broadcasters meet
the needs of an
ever-fragmenting
audience?

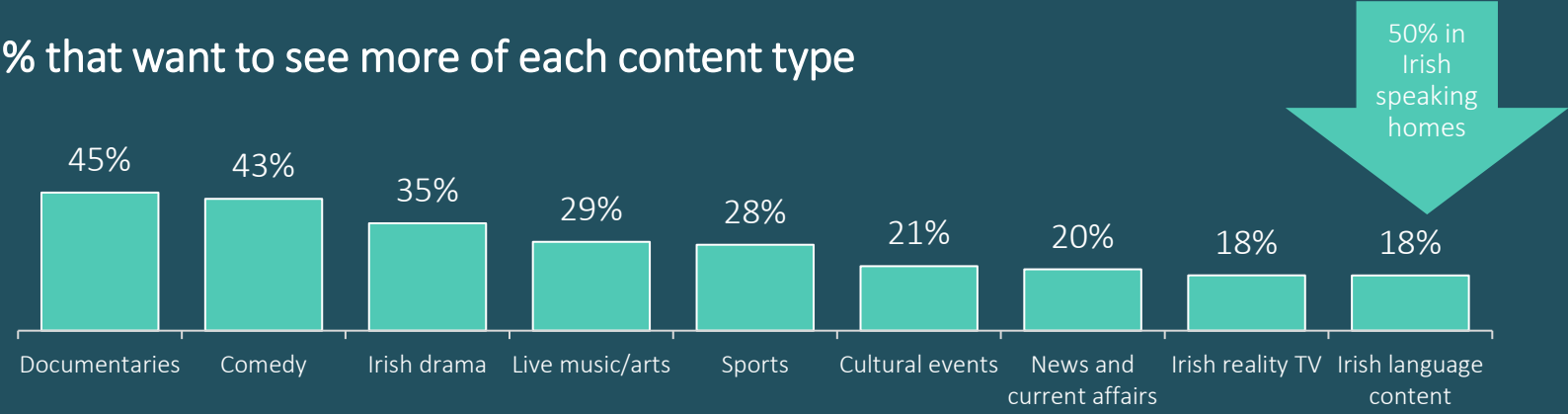


Fragmentation is reshaping the media landscape. To stay relevant, broadcasters need to create content that feels Irish and brings people together, while also competing with global streaming services.

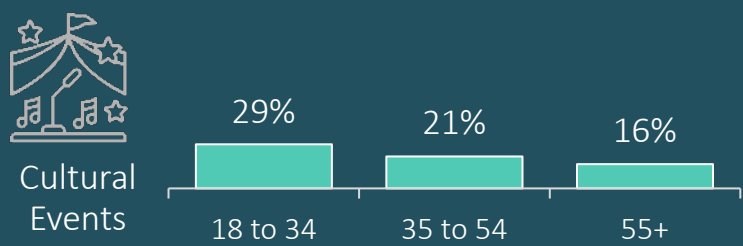
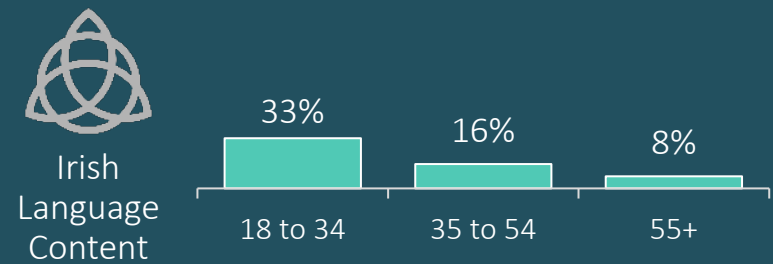
Irish broadcasters have a unique opportunity to deliver content that international streaming platforms may overlook

This includes homegrown content including documentaries, Irish drama, cultural events and the arts.

- % that want to see more of each content type



There is a growing appetite for culturally resonant content, especially among younger viewers, which presents an opportunity for differentiation and culturally affirming programming



News and current events remain the cornerstone of public service broadcasting

While a significant proportion of the population are getting their news online from non-traditional sources, leveraging the existing trust in public service broadcasting can pull people back to traditional platforms in an age of diss/misinformation.

The role of news media

69%

Of Irish adults say Irish news meets or exceeds their expectations

(19% falls shorts,
12% no opinion)

Importance of news content when it comes to expectations of Irish broadcast media in general NET Important (6-7)

Trusted and accurate news



72%

News content that helps me to understand what is going on in the world today



65%

News content that keeps me informed about my area



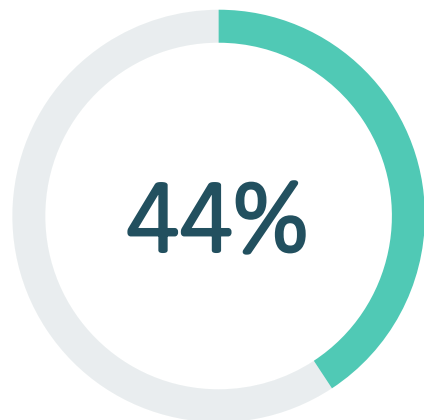
53%



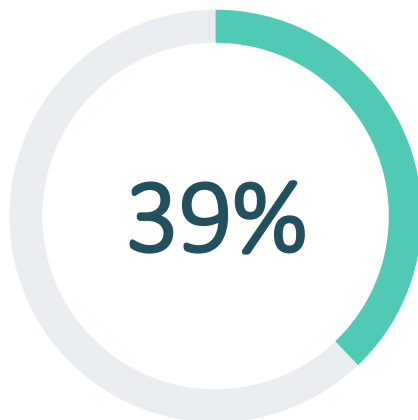
Shared viewing experiences matter

Viewers value content that fosters community and conversation, such as live events or culturally significant programming. This can help maintain relevance and emotional connection.

Aspects Important in Irish Broadcast Media Net: Important (6-7)



Events that bring the nation together for a shared viewing experience



Content that I can watch and talk about with people I know



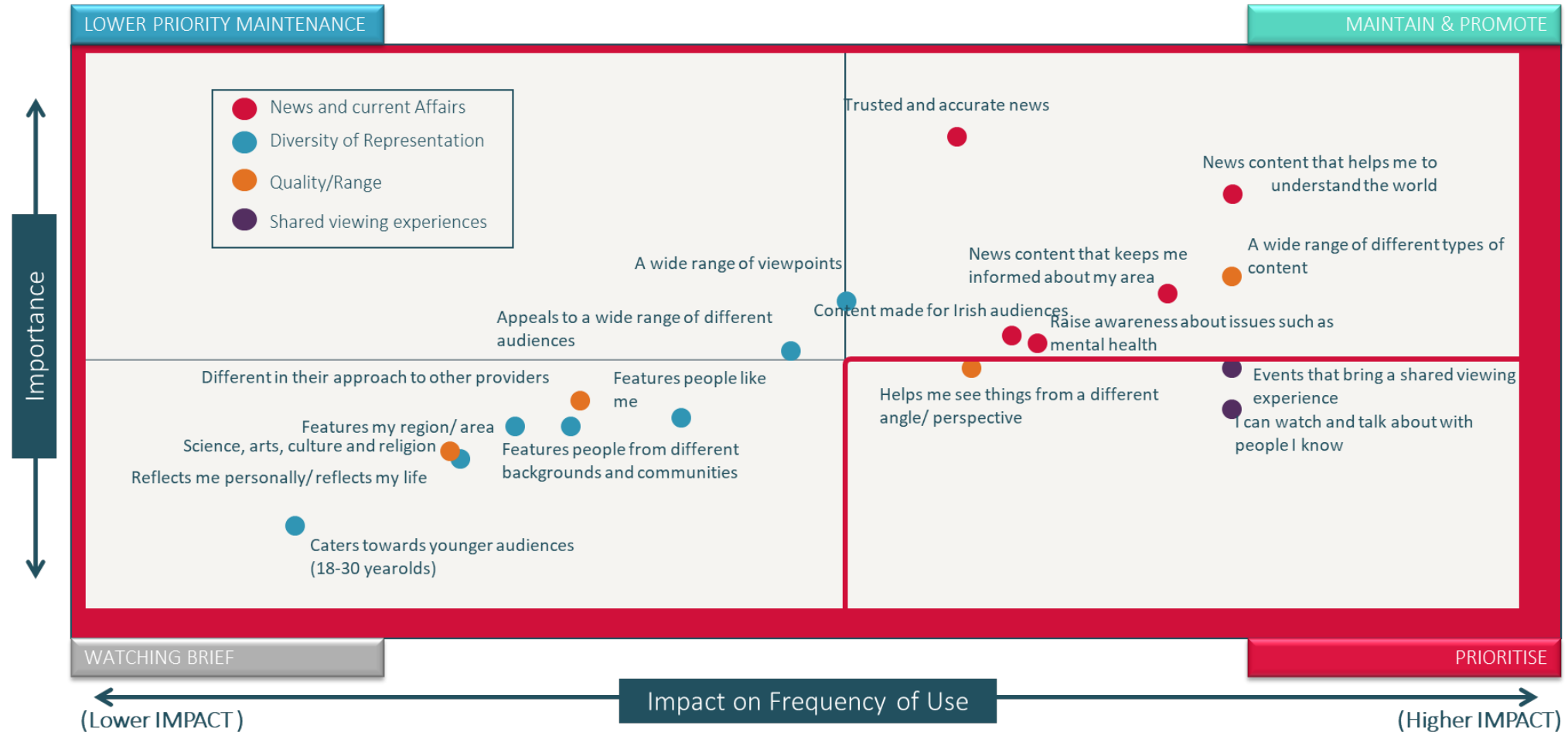
52% of Irish people say Irish broadcast services meet or exceed their expectations on shared experiences



We can discern which elements play a more important role in conversion



Areas within the top right quadrant are currently should continue to be leveraged as due to their high importance. Those in the bottom left quadrant are areas aren't widely recognised as drivers but play a key role in driving usage.



Broadcasters should be supporting in news products, range of programming and culturally relevant shows

Shared experiences, programming with higher talkability and programmes that offer a different perspective should be championed

Key Action Areas for growth

These are areas that are not viewed as particularly important, but nevertheless are a key driver media consumption

Events that bring the nation together for a shared viewing experience

Content that I can watch and talk about with people I know

Content that helps me see things from a different angle/ perspective

Shared experience, talkability and unique perspectives



Areas to continue to leverage

Broadcasters should continue to utilize these areas due to their high importance amongst regular consumers of broadcasting.

Trusted and accurate news

News content that helps me to understand the world

News content that keeps me informed about my area

Raise awareness about issues such as mental health

A wide range of different types of content

Content made for Irish audiences

Trusted and informative news, content variety and culturally relevant



RESEARCH
EVALUATION
DIRECTION
CLARITY

See More, Clearly

REDC



ON AIR