

BRIC LAGE



Value of Independent Media

Research Project Debrief



September 2025

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1

Background to the work

Project Background

The current BSS (former Broadcasting Authority of Ireland) was developed in 2017, and it outlined the regulator's strategy for licensing independent broadcasting services in Ireland, in addition to those provided by public service media.

While it anticipated change and evolution in the regulatory and media landscape, the pace of change accelerated exponentially and continues to do so. Hence the need to explore the views and opinions of younger audiences.



As part of the BSS Review, this research was needed to explore younger audiences' views on the following:

1

The extent to which the mix of multiplatform radio, television, and video-on-demand meets the needs and preferences of younger audiences (eg, the educational, informational and entertainment value of these media)

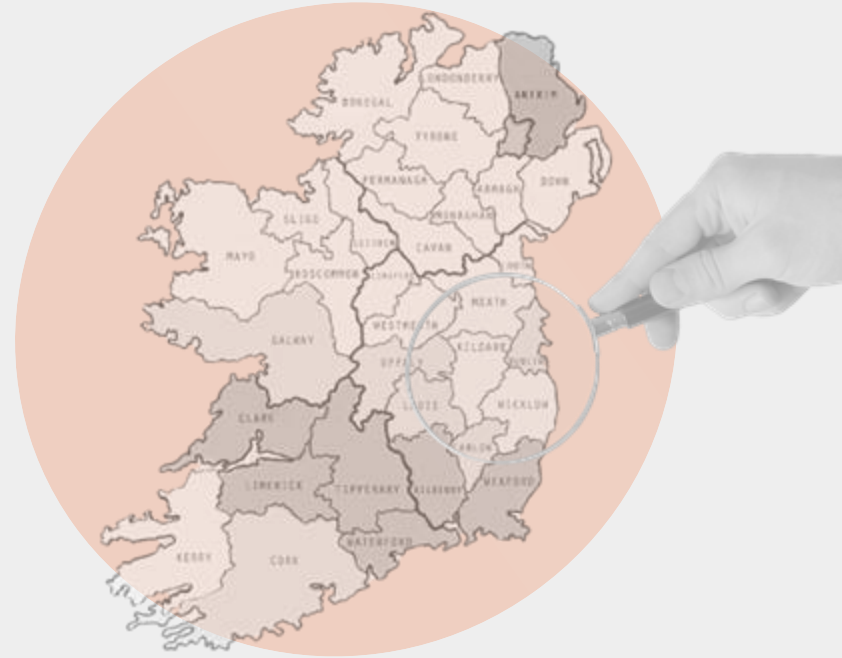
2

The gaps, if any, in the provision of content by these media? Why are young people turning to / engaging with content on social media?

These research will complement other research activities being undertaken as part of the BSS Review, which will examine, the societal and public value role of independent (multi-platform) media, including its public watchdog role, media literacy, plurality, and diversity, as well as its contribution to, and creation of public service content.

OUR RESEARCH OBJECTIVE

Explore the landscape of media consumption focusing on Independent Irish TV and Radio to new streaming services to understand pain points and opportunities for new channels.



Approach / 5 x Focus Group with Pre Task

We conducted five focus groups, each preceded by a pre-task where participants completed a three-day media diary across online, social, and traditional media, followed by a reflection on their choices of sources.



	LOCATION	CONSUMER SEGMENT		AGE
1	Dublin	Mixed Gender	BC1	18-23
2	Dublin	Male	C1C2	24-29
3	Cork	Mixed Gender	BC1	30-34
4	Cork	Female	C1C2	24-29
5	Mullingar	Mixed Gender	BC1	18-23

ONLINE ETHNOGRAPHY PRE-TASK



Participants completed a pre-task, which involved Q&A works as well as media diaries. This encouraged digital natives to observe their choices more consciously and provided a valuable starting point for deeper discussion in the online ethnography focus groups.

2

Our target & The Media

To start off, let's review what we mean by 'media'

Even though the word 'media' is not a commonly used word for consumers - seems to be more connected to 'social media' and press / news outlets - we are working with a definition that includes **all the visual and/or audio content that we can get from the radio, TV, streaming services and social media platforms**



The landscape in which we consume media in Ireland has changed – *significantly and in multiple ways* – in our target's lifetimes



In terms of the breadth and type of content available

RANGE OF CHANNELS

Where once consumers had access to only handful of channels, their choice now encompasses a proliferation of channels and media brands - both global and domestic, as well as user-generated content - a much busier, competitive environment for brands to stand out within

"Back years ago, you didn't have a choice, so you just watched what was there. Everyone knew the ads and whatever show was on but now I wouldn't have a clue what's on normal TV."

Male | Cork | 30-34

SOCIAL FIRST

For many, particularly at the younger end of the target, Social Media accounts for the significant majority of media consumption, platforms like Tik Tok even becoming a go-to for material like sports events/movies

"For me, TikTok is really informative, that's where I get most of my news and information... like travel tips, or what to do in another country."

Female | Cork | 30-34



In terms of the breadth and type of content available

TYPES OF CONTENT

Classic media formats and genres have evolved and expanded into shorter forms (short/reels), longer forms (podcasts), hybrid forms, driven by greater experimentalism, greater air time and the rise of consumer generated content (on Social in particular) We now have endless opportunity to explore the most niche/specific of topics



TYPES OF VOICES

There has been a vast widening of viewpoints/topics/people that our target are being exposed to, including a broadening of age profiles, nationalities, political points of view, ethnicities



*"I suppose back in the day, my parents got their news from RTE, whereas **people my age will follow citizen journalists on Tiktok and get their news that way.**"*

Male | Dublin | 30-34

But also in terms of how that content is consumed

SCHEDULING TO ON-DEMAND

We've gone from a system of tightly timetabled content to one of 24/7 on-demand accessibility, available on digital platforms/social media/catch up channels.

Expectations of the user experience of platforms are high, due to standards set by big streaming services.

"I think the RTÉ Player is just really badly made compared to Netflix and the others. The user experience is poor — like you watch 10 minutes of ads, it doesn't save your place, and the layout feels clunky."

Female | Cork | 30-34

CONSUMPTION AT OUR OWN PACE

It used to be that the pace of material was dictated to us by the media channels, but now consumers assert more control - from watching content on double speed, to binging on box sets, to dual screening

"Sometimes I'll watch vids on 1.5 to get through them quicker, I'm impatient to get to the end, so the faster pace works for me"

Female | Cork | 30-34



But also in terms of how that content is consumed

VIEWING AS **DEFAULT**

It used to be that viewing felt more intentional whereas now media consumption seems to have become something that happens almost as a default, from mindless scrolling at the bus stop to getting sucked into the algorithm in the evening. Media consumption is often not an event in itself, but something that accompanies other events (podcasts while on a run, YouTube videos while eating lunch)

"I'll watch YouTube videos while eating dinner, just to have something to occupy me while I'm eating. Nothing too serious/heavy, I'd save that for later in the evening"

Male | Dublin | 24-29

FROM COLLECTIVE VIEWING TO MORE INDIVIDUAL

Much less of a sense nowadays of people consuming media 'together' as a peer group, a family, a nation. Decline of 'water cooler' chats - though this hasn't gone away entirely. The rise of 'the algorithm' in determining individual choices.

"It's hard to coordinate, even with my boyfriend. We'll try to watch a series together, but then he might not be around one night and I'll want to carry on, so we'll end up at different points in the same series"

Dublin | Female | 24-29



But also in terms of how that content is consumed

CONTENT FIRST

Consumer choice and navigation is often driven by specific content, rather than channels. Those using smart TVs/pirate sites may not be fully aware what platform is hosting the material they're watching. Type of screens available (phone/laptop/TV) is often more of an indicator of what kind of content will be viewed than anything else

INTERLINKED PLATFORMS

There is significant inter-connection across media platforms, with consumers engaging with brands/programmes across multiple platforms at once. I.e. Radio content being accessed via social media channels, new Netflix offerings promoted via short clips on Tik Tok/Insta, big name shows like Love Island supported by extensive social media coverage



"I just search for the show and click whatever comes up – half the time I wouldn't even know what platform it's on."

Female | 30-34 | Cork

"On my phone it's usually short stuff like TikTok or Instagram just to scroll, but if I'm on the TV I'll put on a film and actually watch it"

Female | 24-29 | Cork



This represents a huge shift in terms of the media landscape we're operating within

BEFORE | ANALOGUE ECOSYSTEM

NOW | DIGITAL ECOSYSTEM

Scheduled (*Linear*)
Linear)

On Demand (*Non-*
Linear)

Collective *Viewing*

Individualised *Viewing*

More Formal & Structured *in Approach*

More informal *in Approach*

Content Dominated by **Small Groups of 'Insiders'**
Diverse

Content Creation more **Democratic and**

Viewing more **Focused & Purposeful**
Diffused

Viewing more **Fragmented and**

Content being **Accessed in a More Serendipitous Way**
Algorithm

Content being **Fed to us via the**

Media brands/Channels/Platforms
Operating (relatively) Independently

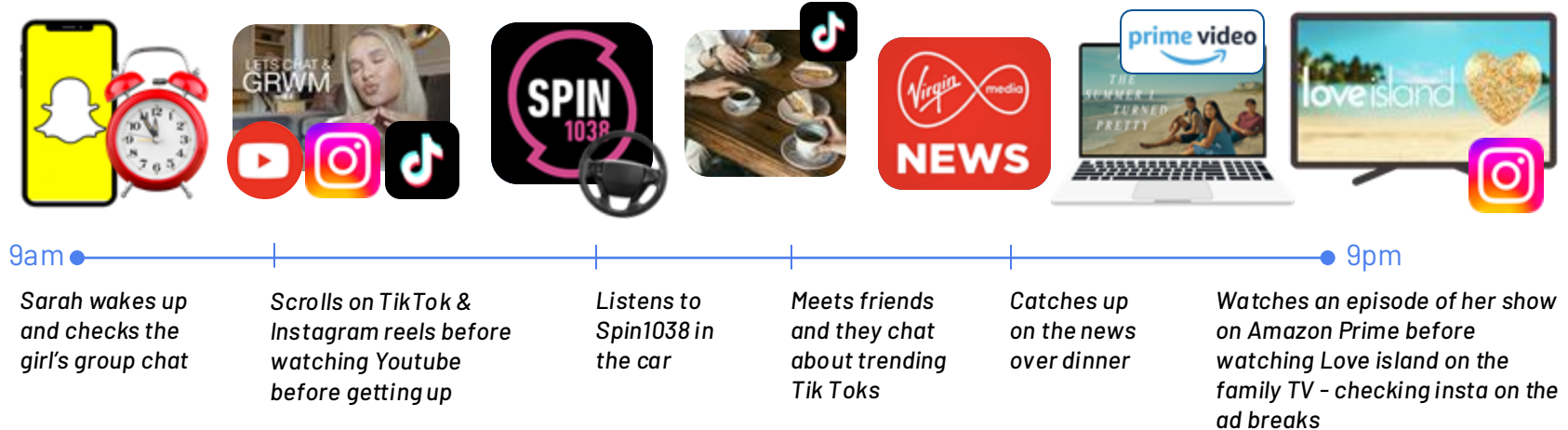
Media brands/Channels/Platforms
More Interconnected

Typical day's media consumption – Sarah



- Sarah is 19 years old and lives in Mullingar
- She is currently living at home with her family and in first year of college.
- She works part time in a restaurant & enjoys playing GAA

SUNDAY: SARAH'S DAY OFF

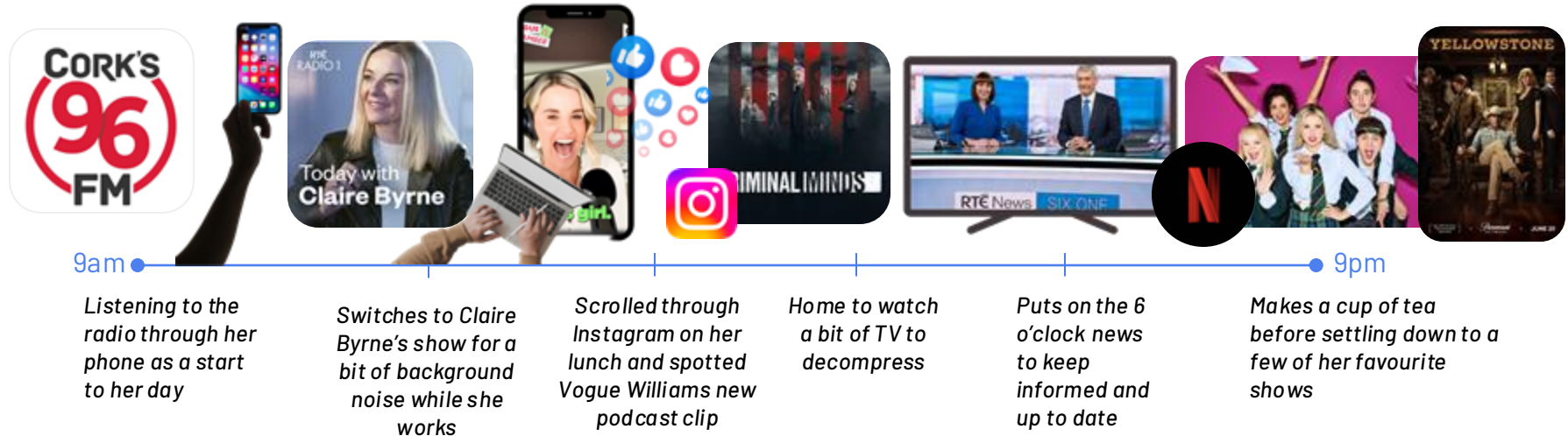


Typical day's media consumption – Ailis



- Ailis is 32 and works in talent acquisition
- She loves listening to current affairs and crime podcasts and follows lots of cooking and eating pages on social media

TUESDAY: WORKING FROM HOME



Typical day's media consumption – Alex



- Alex is 27 and lives in Dublin working as an accountant
- He follows music and enjoys listening to podcasts while commuting
- Alex loves football and enjoys watching sports highlights on YouTube in the evenings while winding down after work

THURSDAY: ALEX'S DAY IN THE OFFICE



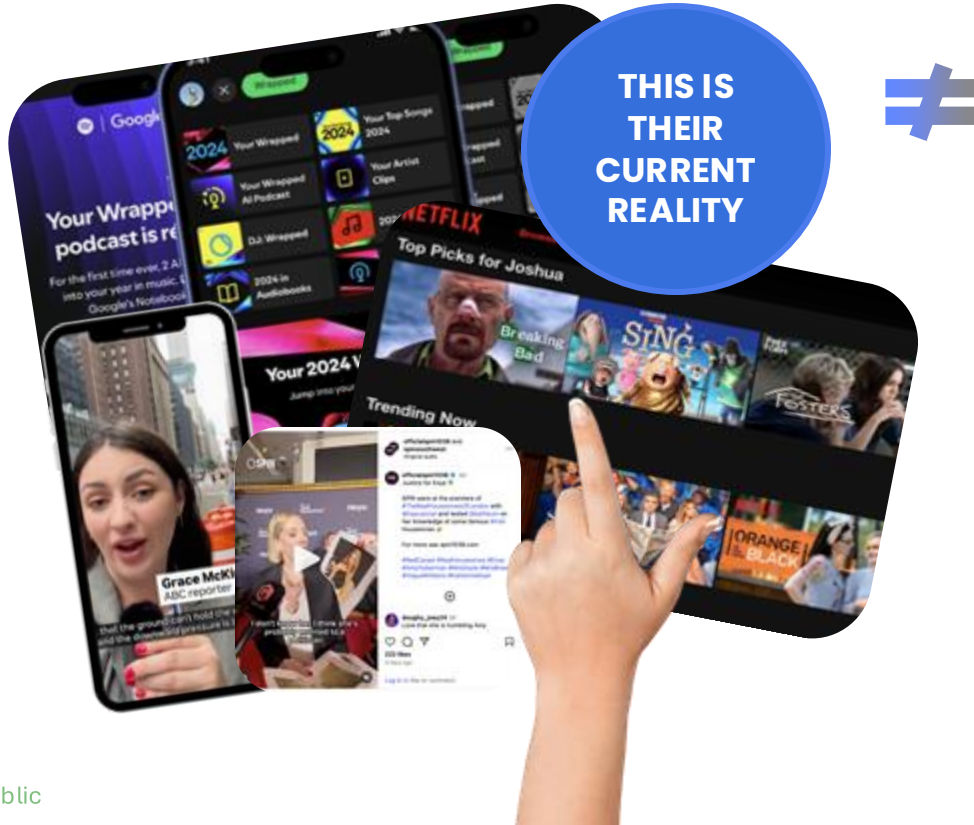
**For the older end of our target
(25-34 years old), memory
structures are still shaped by
what media used to be like.**



**But at the younger end
(18-24) this shared
context is fading fast..**



For Gen Z, the visual hallmarks of their media experience have evolved significantly



WHEREAS THIS FEELS LIKE ANOTHER ERA



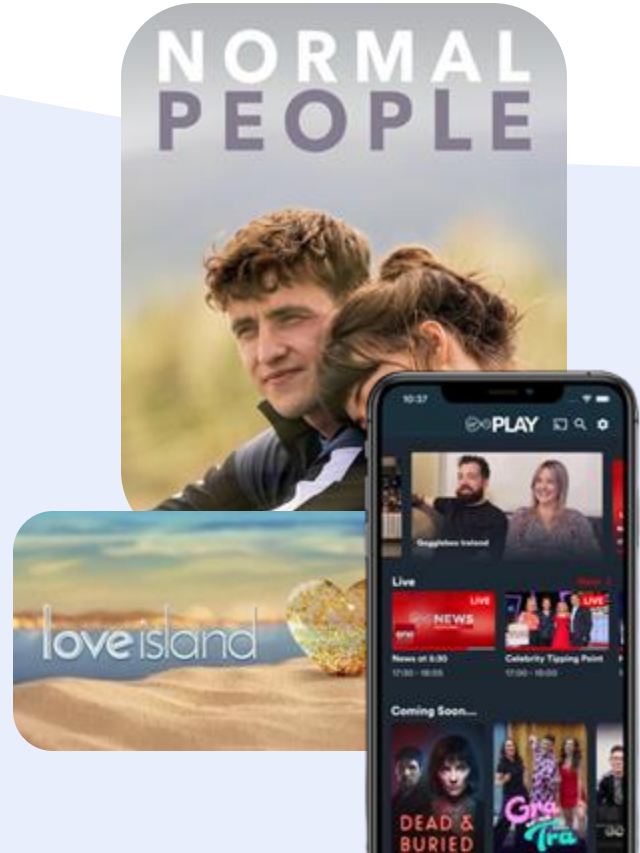
But equally, there is no 'one way' to win in this new digital age

- 'Digital Native' brands like Netflix may have an advantage in navigating the new digital ecosystem, but **any brand with good basics** (quality content/good user experience) can stand out. BBC, for example, comes up as a good example.
- **Classic media brands are getting better at utilising social media** as an access point for content, with radio stations standing out particularly here



But equally, there is no 'one way' to win in this new digital age

- The shows themselves can take on a pivotal role in **navigating the digital ecosystem**. Content like Love Island works across multiple social media platforms while being broadcast on Virgin, driving engagement from multiple angles.
- **Great content doesn't have to be prestige/big budget/highly advertised** to cut through. Dramas like *Normal People* became hugely popular without Netflix/Now style budgets or promotional strategies. There is nostalgia for more old school, lower budget programming that delivered strongly on entertainment values (*Hardy Bucks*/*Pure Mule*)





There are elements of more traditional media consumption that our target see the value of

Collective/Communal

Viewing experiences that bring groups together and create shared experiences

"Like that idea that you'd all watch the same stuff on a Saturday night and you'd all talk about it at school on Monday. I kinda miss that"

Male | 30-34 | Dublin

Beyond Algorithms

Exposure to a wider range of content outside our established preferences, coming across material serendipitously, rather than being fed direct by the algorithm

"There are times when you feel boxed in, like typecast by your phone. On TV you'd stumble across a wider range of content, but on your phone you might never see it"

Male | 24-29 | Dublin

Easy go-tos

Options that don't require much hunting out or high engagement viewing and are easy to have on in the background or are typically a comfort show

"I'd usually just throw on Friends or The Office, something I've already seen before. It's easy to have on in the background, I don't have to think about it, and it's just kind of comforting."

Female | 30-34 | Cork

3

Purpose Of Media

While the ways in which media is consumed have changed dramatically, the underlying purpose of media consumption has remained relatively constant





For our target, the purpose of media is multifold



To start with the most top of mind ...



To Entertain

The most obvious role for media, engaging viewers via diverting stories, humour, characters, topics, competition, human endeavour, etc.

OPPORTUNITIES

Although today's media landscape has the capacity to cater to an infinite variety of preferences/topics/styles, there is a feeling that the big content providers can get distracted from this mission creating impressive and laudable content or becoming too genre specific. Well crafted, widely relevant, uncomplicatedly enjoyable content is something our target feel was done better in the past - E.g. *Grey's Anatomy/Inbetweeners/Modern Family*

"Before all the streaming platforms, on a Wednesday you'd have Grey's Anatomy and Desperate Housewives, and everyone used to watch it that night and talk about it after the next day. That was peak TV"

Female | 24-29 | Cork



To start with the most top of mind ...



To Educate

Clearly another hugely important objective for media, with learning about the world, culture, individual interest areas being a big reason to turn to the media

OPPORTUNITIES

Our target are now used to educational content coming from all kinds of sources/individuals and encompassing all kinds of styles.

In the past, educational content may have felt very serious/establishment/top down, but today's content is much fresher/vibrant/diverse in its approach.

"Derry Girls is extremely funny, resonates with Irish history, and really captures Irishness while set against the backdrop of the Troubles."

Male | 18-23 | Dublin

"One of the best things I've ever seen on TV was Chernobyl the mini series. And, like, they just remade a historical event, like a documentary. But it was amazing and like, you could absolutely do in an Irish setting, and it would work really well."

Female | 18-24 | Dublin

And move through the ranks...



To Distract

Another important function, media as a 'reality break', as a means of escaping from thinking/real life responsibilities activating "turn off" mode.

OPPORTUNITIES

Social Media has delivered to a huge degree in this space, though often in a way that can feel underwhelming/unfulfilling (Tik Tok Doom Scrolling). Traditional media's role in distracting us is thus being looked at with fresh eyes, with reality content and easy viewing quiz shows (e.g The Chase) offering a distraction from the distraction of Social Media

"It takes you away from reality, I mean even watching a reality show isn't necessarily realistic. So yeah, like, it's sad, but if you're finished work, you don't want to be thinking about work. You don't want to be stressed. So what are you gonna do? You're gonna stick on a show and hope that you can forget about the fact you wake up at whatever time the next morning to go back to work."

Male | Dublin | 18-24



And move through the ranks...



To Bring
Comfort

A very important driver for our target. In a complex world, content can have huge value in delivering familiar and predictable so they can relax and stay in their comfort zone.

OPPORTUNITIES

Again, it's older material that our target lean towards for these needs (Friends/Modern Family) so there may be opportunities to create similar gentle/feel good content. For past generations, soaps would have fulfilled a role here, so potential to explore what the equivalent could be for our target.

"It's just having something on in the background that gives you just a nice, comforting feeling. Sometimes I'd be scrolling or chatting with my family, but it still feels like you're watching together. That's why I'll turn on Friends, even though I've already seen it a million times."

Female | 18-24 | Dublin

And move through the ranks ...



**To Connect Me
To The World**

A significant role, particularly for traditional media, in keeping people company/connected to others/up to date with what's going on in the wider world.

OPPORTUNITIES

Radio and traditional TV scheduling (Breakfast TV) has traditionally delivered strongly here, as well as sport.

Opportunity with our target is to deliver this kind of content, but centring their age group more strongly and delivering to their interest areas

"I like the radio in the morning because it's real time, like live information happening. It makes you feel part of the world a bit. Podcasts are great, but radio gives you that sense of being connected"

Male | 30-34 | Cork

"I love GAA Plus as it helps people be able to watch numerous GAA matches from anywhere in the world. It connects people from a local, national, and international level"

Female | 18-23 | Mullingar



And move through the ranks....



To Discover and Support

The media can be a valuable means of introducing us to new content, genres, artists, sports, teams that we can channel our interest in and support in their journey. From our favourite football team, to emerging music artists - watching their progress can be a joyful experience.

OPPORTUNITIES

There will always be opportunities for media to support new/emerging sports and teams, up and coming talent in the arts. This is something that our target are not seeing huge amounts of, particularly in spheres like music/comedy.

"I love the Underdogs series on TG4. It's GAA focused showing the intercounty teams, it feels authentic, and tells a great story."

Male | 18-23 | Mullingar

"I love the Hull City Podcast - it's about my football team and they also get input from the fans so it's very relevant and uptodate"

Male | 24-29 | Dublin

To the more implicit roles



To Represent Me

Media as a relatability driver, where people can see themselves represented, with their own experiences, lifestyles, worldview reflected back, worked through, commented on. Important to our target to see others like them, with the same hopes/dreams/concerns

OPPORTUNITIES

Something that resonates with our target in particular as much of the material they are watching, particularly on streaming services, is very global rather than specific to their reality. National broadcasters like RTE can feel removed from a younger Irish person's experience, so this represents a significant opportunity area for a new channel in the area.

"There was this show and the presenter would show houses to just normal people with normal jobs so it's nice just for our age group to see how people are trying to do it because we can relate."

Female | 24-29 | Cork

"On RTE they have 'How to be Good with Money,' I was obsessed with that as I was saving for a house at the time. I just don't think people talk about their finances in Ireland, people aren't educated about it in school."

Female | Cork Group 3 | 30-34

To the more implicit roles



To Embody My Culture

A hugely important role for media that works on a more subconscious level for our target. It may not come up much explicitly in conversation, but it is subliminally present in the majority of the conversation we have

OPPORTUNITIES

Again, not something that the big streaming services have a particular remit to deliver, so plenty of opportunities here also. Discovering and nurturing new Irish talent (music/comic/acting/writing/producing) is seen as a very valuable addition

"Normal People was just so wholly Irish - just clinically Irish and like everything about it. It's Irish people, like the Irish thing of bumping into someone you knew years ago and then it touches on, like, the old social shame, and which is a huge thing in Ireland."

Male | 18-23 | Dublin

"I really like the 'How to Gael' podcast. It's appealing as it is a mixture of Irish and English speaking women that talk about gossip and generic topics whilst also interweaving the Irish language into the everyday chats"

Female | 18-23 | Mullingar

These roles are not mutually exclusive

In fact, the most exciting opportunities can be found in combining two or more



For instance, Entertainment and Education are not seen as mutually exclusive by our target, ideally content would do both at the same time
- see examples like *The Rest Is History* / *Derry Girls*



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While these opportunities can be specific/niche, some of the most helpful content for our target combines Representing Me with Education, creating material that they can genuinely use.

How to be Good with Money came up as an example of this with our 30-34 Cork group.

Some of the most powerful material they'd seen in the last few years works across multiple drivers.



- e.g. "Normal People" is both Entertaining and Representative of Irish Experience - but also contributes significantly to a sense of 21st century Irish culture

4

Irish Media Landscape

The Irish media landscape does play a role for our target

By Irish Media we mean the combined contribution of state and commercial Irish media channels, covering both TV and Radio

Even if this is at a mostly theoretical level - they see it as an important service to have, even if they aren't personally highly engaged with it



- As a country, it's important that we have our own News/Weather/Sports coverage as well as specific Irish content shows
- It's good to have some sense of an 'establishment' media that's answerable to the public/has to adhere to certain standards, particularly given the 'wild west' of Social Media
- While the content may be less important to our target, it can be more valuable to older / younger family members, who would miss its presence

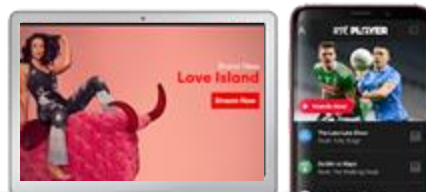
Our target engage with Irish media channels in a number of ways – more TV focused

Please note, these are not mutually exclusive, our target can exhibit any/all of these behaviours simultaneously



OLD-SCHOOL ENGAGEMENT *WITH BROADCAST TV & RADIO*

Tuning in at specific time for the 6pm news or soap/drama/movie showing. Constitutes a small minority, mostly at the older end of the target and/or still living in the family home. This can have value for the 'household' as well as the individual



ACCESSING CONTENT FROM IRISH CHANNELS **ON DEMAND**

Watching box sets, series, documentaries, reality shows from RTE/Virgin in the same way they'd access content from subscription channels like Netflix/Disney. While Irish Media channels don't have the same breadth of content, there can still be a role for them in the repertoire, though the user experience can be challenging



WATCHING SPORT *(IRISH AND INTERNATIONAL)*

For GAA/local sports, Irish media channels can be the only means by which matches can be accessed. For international matches, Sky Sports/RTE/even TG4 are delivering in various ways. Some frustration at how sports content is dispersed across channels though, requiring additional planning/subscribing to services

Our target engage with Irish media channels in a number of **ways** – *more Radio focused*

Please note, these are not mutually exclusive, our target can exhibit any/all of these behaviours simultaneously



CONNECTION & COMPANIONSHIP

Having the radio on in the background, whether that's pottering around the house/in the car/in work. The mix of chat/competitions/ mainstream music selection that Irish radio stations deliver offers something above and beyond Spotify/Apple playlists



LOCAL ENGAGEMENT

Particularly important for those outside of Dublin, but local radio can be an important source of local information/news for areas of the country who don't see themselves on mainstream channels much. Our target see the importance of local media figures (Neil Prendeville for example) in championing their voices and putting their concerns on the map.

In their own words...

"I know my family will be watching the six o'clock show every evening so when I want to reconnect with them and be near them I'll sit down and watch the news and we'll have a running commentary so it's kind of fun"

Male | 30-34 | Cork

"RTÉ is just more informative, I suppose you don't get that with Netflix, yeh, no, you're not going to know what's going on locally"

Female | 30-34 | Cork



"I actually get frustrated by the sports. Like, they'll have rights split up - for example, RTÉ will have one match and Virgin Media will have the other. If you're trying to watch through streaming, on the RTÉ Player or Virgin Media Player, it's awkward to keep up. You're coming out of one app trying to find it on something else"

Female | 18-24 | Group 1

"I'll go back and go on to the RTÉ Player if there's something I want to watch. Like when the new season of 'Room to Improve' was on, I went back and watched all the other seasons. Same with Virgin's 'Help Me Buy a House.' I watched it on the Players, not on the TV"

Female | 24 - 29 | Cork

When it comes to Irish TV channels, RTE dominates the conversation, unsurprisingly, as it is the national broadcaster

- As such, held to higher standards than other media channels, comes under greater scrutiny
- Recent controversy associated with it still raises its head in conversation
- It has become synonymous with TV 'as it was', TV in the analogue ecosystem.

Of all the media channels that our target interact with, it feels the most resistant to change, which puts it at a huge disadvantage when it comes to meeting their needs



Our target can point to its merits and some benefits the RTE TV content delivers

Some strong drama / comedy content

Most notably shows like *Love/Hate*, *Kin*, but also *Hardy Bucks*, *Young Offenders*, *Pure Mule*. However there's a sense in which the 'hit rate' of great shows could be a lot better.

Factual content based on Irish people's lives

Programmes like *Room To Improve*, *Great House Revival*, *How To Be Good With Money* - though these tend to be more relevant to those in their late 30s and beyond, rather than a younger demographic

Takes its role as a National Broadcaster seriously

Plenty of material on Irish history, current affairs, documentaries, educational content (particularly for school age), though again, questions about whether this could be done in a more viewer-friendly manner

Maintains its relevance for the Irish people

In some of its core offerings, particularly news, weather, sports coverage and culturally resonant events like *The Late Late Toy Show*.

More recently, reality shows like *The Traitors* have delivered over and above expectations.

However, the feeling is that RTE is not delivering strongly to this target



Lack of focus on the target

Material seems to be targeted at older cohorts and/or younger (RTE Juniors) with our 18-35 year old target left somewhat out in the cold. This applies to the type of content being produced, but also the presenter line up, which feels older/less relatable to our target, particularly compared to the peer to peer approach they're used to on Social Media/Podcasts



Struggling to Compete With Streaming

In terms of sufficient amounts of Binge Worthy content, compared to giants like Netflix and Now. But also the user experience of RTE Player, which feels technologically far below the experience they're used to from Netflix/Amazon/etc. There are also issues with marketing and communications of RTE material, which would struggle to cut through with our target, no matter how good/applicable.

However, the feeling is that RTE is not delivering strongly to this target



It Can Feel Myopic



For a generation used to hearing from disparate voices, across the world via Social Media, the RTE point of view can feel a bit limited. This can be seen particularly via news coverage, which is highly focused on Irish/US material at the expense of the rest of the world and also in terms of the political perspectives it platforms



Playing it Safe

Not very much risk taking going on in terms of championing new content, trialling new formats or taking risks on new presenters. For a national broadcaster, it doesn't feel like its done much lately to champion new Irish music/acting/writing/comedy talent, particularly among a younger generation

However, the feeling is that RTE is not delivering strongly to this target



**Excessively serious
and dark**

Particularly news/current affairs/history/drama can feel dull and worthy. This contrasts with what they're used to from Social Media/Podcasts/Streaming services, where serious material is often treated with more levity, more of an entertainment focus, more levity. Comedy is something that RTE used to be good at and used to showcase, but it's lost its way in this regard recently

In their own words ...

"Love/Hate was just so realistic and genuine, it felt like it could actually happen that's why it was such a big success. I watched Kin and it was good, but still nothing like Love Hate. It's been a while since RTÉ has had a show on that level."

Male | 30-34 | Cork

"I wouldn't care if they scrapped RTÉ, get rid of it. They're too afraid to do something new, they're just investing in the same thing every year nothing interests me on it so I never put it on"

Female | 24-29 | Cork

"Even if RTÉ had the perfect show that would capture my interest, I wouldn't hear about it because none of my friends really watch anything on it like I'd never think to put on RTÉ because all the trendy shows are on Netflix"

Male | 18-23 | Dublin



Virgin Media's role in the Irish landscape is less crystalised for viewers

- Feels more commercial and 'easy viewing' than RTE - more youth friendly
- But without the 'global streaming brand' aura of Netflix or Disney
- The majority of our sample associate Virgin with big reality TV titles - *Love Island*/*Gogglebox*. There is enthusiasm for more of the 'good' Irish versions of established reality TV formats
- And/or easy watching like *The Chase*
- As well as the sports content, League of Ireland, etc.



There's a role for this, particularly the Reality TV. Titles like 'Love Island' are among the biggest TV 'events' of the year for our target.

In their own words....

"I tried to stream a match on Virgin Media Player, but as soon as the ads came on, it glitched. I could only ever watch the first quarter of anything. I just turned it off then"

Male | 30-34 | Cork

"Virgin is completely different... it's solely for entertaining. RTE is historical dramas, Irish history, but Virgin has so many dating shows or game shows"

Female | 18-23 | Dublin



"Virgin Media is very Irish as well... but it feels a bit more current and trendy than RTÉ. It has the Love Islands of the world, aimed at a younger audience, with more reality TV and less serious content."

Male | 24-29 | Dublin

"I scrolled through Virgin for a while and actually got frustrated trying to find content I like... things weren't categorised. It's literally such a simple thing to do"

Female | 24-29 | Cork

When tasked with investigating Virgin Media, the majority found additional content that interests them



BOX SETS

Code of Silence, Rig 45

DOCUMENTARIES

The Guards, Trump's Last Stand, Fall of Bomber Kavanagh



EASY WATCHING

Red Rock, Shark! Celebrity Infested Waters, Great Inspo Home Adventure



COOKERY SHORTS

Kerrygold, etc.

Barriers to watching more content from Virgin is mostly functional

Player app can be harder to navigate compared to Netflix/other big streaming brands – doesn't search for genres, lacking in tailored recommendations – *making it more difficult to find content that viewers would be interested in*. Having said that, it is more user-friendly than the RTE player.



It can be difficult for this material to cut through, get on consumers' radars and onto 'your list'. Particularly for those with multiple paid streaming services



"When I used the Virgin Media player, the first thing that got thrown at me was 'Summer of Love' and that was all they were pushing. There's no categorization, so I had no idea what anything was. It just wasn't appealing and I thought, yeah, this is why I don't use it."

Female | 18-23 | Dublin

For those into Radio, Irish channels deliver pretty well

- Channels tend to have a good mix of music, chat, competitions, audience interaction – delivering on needs around Companionship/Connection to the World/Distraktion
- Good variety of more elevated/more down to earth approaches – from Newstalk to Spin
- A wide variety of National stations as well as more localised – Red FM/Midlands 103

Our target seem to feel greater connection/relatableness towards Irish radio presenters, compared with TV talent (particularly RTE) – though that may have more to do with the nature of the medium rather than anything to do with the presenters themselves

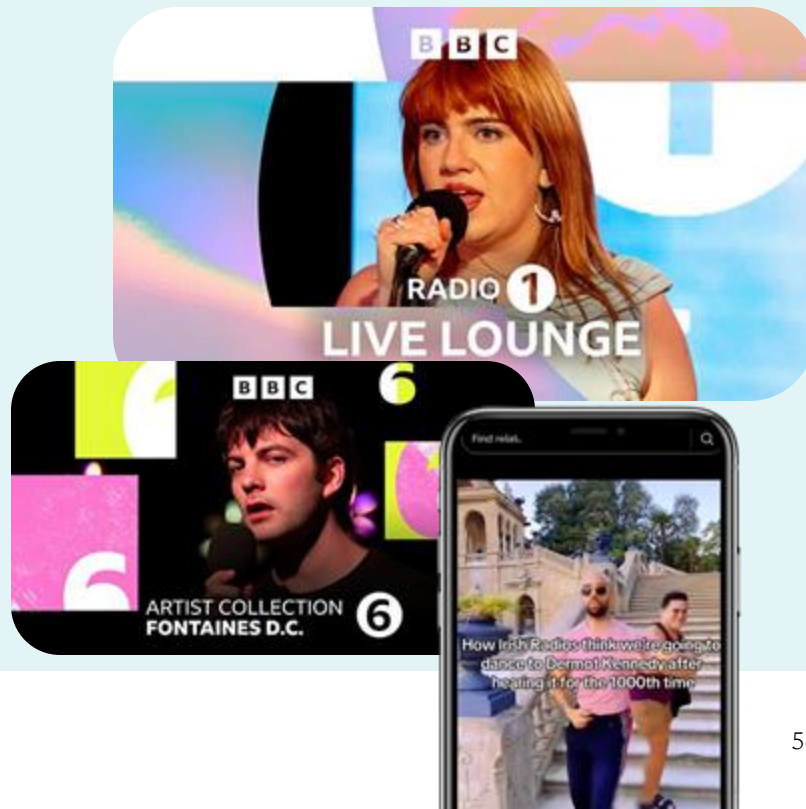


However there are some areas that could be better catered to

- Particularly around the variety of music being played - there's a sense that many of the stations can be a bit samey in their playlists, covering the same artists/genres
- There's a sense of frustration that Irish radio is not doing more to discover and nurture new Irish talent, feels like it's falling to brands outside of Ireland (BBC) to do this

"It is quite ironic that the biggest platform for promoting small Irish bands is BBC. There's some really big Irish artists that are popular right now, but they just don't play them here"

Female | 18-23 | Dublin



Awareness of new DAB radio stations isn't high among our target

But when prompted (*Dublin groups only*) there is considerable interest in stations focused on more specific genres of music and niche interests

- These stations have potential to fill gaps in Irish Radio coverage, given their more mainstream focus.
- This kind of material can be accessed via Spotify/Apple Music, but with radio, the sense of discovering things more organically - *rather than via the algorithm - is valuable*
- There is particular interest in stations like Onic Movies/Onic Alternative/Raidió Rí Rá

"Scanning the list, seeing that there's actually, like, a really wide range of music you can actually access. It's nice... the idea that you're not choosing it yourself. On Spotify you really need to know what you're searching for, but here it just plays for you."

Male | Dublin Group 1 | 18 - 24

"I would say Radio Rí-Rá is something that would interest me, because I'm a fluent Irish speaker."

Female | Dublin Group 1 | 18 - 24

An angle to pursue, in Dublin and beyond, though communication of the service would need to be prioritised

Returning to the jobs to be done for Media



- **There will always be opportunities to deliver in Entertain/Educate**
- Within the Irish Media landscape, there are particular opportunities to deliver '**Represent Me**' and '**Embody My Culture**' for this age group, as it isn't something they are seeing from other media brands
- **Discover and Support** is also an opportunity within music, focused on up and coming talent, as the current delivery focuses more on established artists.



Final Thoughts



Executive Summary ...

- **The landscape in which we consume media in Ireland has changed**, significantly and in multiple ways, in our target's lifetimes
- These changes encompass both the **breadth/type of content available** as well as the **ways in which this content is consumed**
- As such, our target's expectations with regards to what a media channel should deliver has **been shaped by their experiences with social media and the big streaming companies** – to a much greater degree than 'traditional' media channels
- We are operating within a digital media ecosystem that has **evolved significantly** from a more analogue ecosystem and the rules for success have changed accordingly
- **Having said that, there is no one way to 'win' in today's media landscape** and we see media brands adapting and evolving in different ways to meet our target's needs. There are also elements of 'old school' media consumption that our target value and would like to see more of.
- While consumption approaches have changed, **the purpose of media for our target remains more constant**, with them identifying a range of roles that media should fulfil



Executive Summary...

- These encompass **Entertainment, Education, Distraction, Comfort, Connection, Discovery, Representation and Embodiment of Culture**
- There are opportunities to deliver further on all of these, however **Discovery, Representation and Embodiment of Culture** stand out as particular areas of potential for our target.
- The Irish Media landscape, as things stand, **does have relevance** for our target, though engagement with it varies quite considerably among this age group.
- Within TV, RTE is seen to have an important role, but **its delivery to the cohort we're speaking to misses the mark in a number of ways**. Virgin as a channel is less clear in its role/purpose, but the content it delivers, particularly reality TV, feels relevant and fulfils a role for our audience.
- **The radio channels cover a lot of bases**, delivering a good mix of music/talk, higher brow/lower brow, national and local. However the music focused on is very mainstream and there's a **clear opportunity to deliver more niche material and more up and coming talent**.



In Culture, Creation

Let's connect!

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TG4 didn't come up much in discussion during the project

However, when it was mentioned, sentiment was very Positive

- Valued for reliable content, and useful for learning and education about the Irish language
- Seen as very strong in sports coverage particularly more grassroutes, niche or alternative sports like minor GAA and basketball
- Audiences recognise its value but may not be top of mind enough for them to engage on a regular basis

“With TG4, I was doing my dissertation and there was loads of media that I could use and quote from it because it is trustworthy. Also just on TG4 as a whole I think it is a great choice of media for so many kids that are doing the leaving cert and stuff and I would watch it with my family at home.”

Female | Dublin Group 1 | 18 - 24



There is a sense that TG4 does a lot with a little - they don't need big budgets to produce strong content

The Role of The Irish Language Today

- There has been a resurgence of the Irish language in youth culture. Gaeilge is increasingly used in slang, music, podcasts, and online communities.
- However, there is a media Gap as traditional broadcasters have not kept pace with this cultural revival.
- Some participants grew up with Irish in their homes, making casual use in media feel natural and more than welcome
- Outlets like Radio Rí-Rá and Irish-language podcasts are valued by fluent speakers, but remain peripheral

"If there was some sort of Irish program where they just throw in little bits of Irish, and people would slowly pick them up."

Male | Mullingar 1 | 18 - 24



There is undeniably an opportunity to leverage the revival of Irish in youth culture

Our target see significant opportunities for Irish Language Media

Accessible Integration

Audiences want Irish woven into everyday shows, not just in formal lessons

Mainstreaming Gaelge

Bring it beyond niche services into popular genres: comedy, drama, sport.

Youth Engagement

Harness its cultural revival to make Irish-language content relevant, modern, and fun.

Creative Storytelling

Use Gaeilge as a stylistic tool for authentic, fresh Irish storytelling.

