



An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

ComReg TV Habits Survey

Ipsos B&A – Report on Survey Findings

Ipsos B&A Survey Findings

Reference: ComReg 26/69b

Publication Date: 15/10/2026

COMREG TV HABITS SURVEY

Report on Survey Findings

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June 2025



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Key Insights

Glossary of terms

1. **Saorview:** the free, national digital terrestrial television service in Ireland. It offers access to Irish TV channels including RTE One, RTE Two, TG4, and Virgin Media.
2. **DTT:** Digital terrestrial television (DTT) provides free-to-air television channels using terrestrial (land-based) transmitters to broadcast digital signals, with viewers accessing this free service using an antenna / aerial.
3. **TV Aerial / Antenna:** a device that receives and processes radio waves to transmit television signals to a TV receiver. These can be internal or external and allows for reception of free-to-air reception of digital terrestrial television (DTT) services.
4. **TV Satellite:** a service that uses orbiting satellites to transmit TV signals directly to viewers' homes. These signals are received by a satellite dish that is usually installed on the roof or the side of a house / building. This allows for more choice in TV channels, with more channels available than DTT.
5. **Free-to-air:** television channels that are broadcast and received without requiring a subscription or monthly fees. Channels are accessed using a compatible receiver and antenna (either satellite dish or terrestrial aerial) without needing to pay a provider.
6. **Traditional TV:** a television set that receives programming through cable, satellite, or over-the-air (OTA) signals, typically broadcasting content on a scheduled, linear basis. There is no built-in internet connectivity or streaming apps.
7. **Smart TV:** a television set that has the same features of traditional TVs but with built-in internet connectivity and can access streaming apps directly.

INTRODUCTION

Project at a glance

ComReg wanted to gather an accurate, robust, and representative understanding of consumers TV consumption habits, including their usage and views on different TV platforms available. Within this, there is a particular interest in understanding consumers' relationship with DTT (i.e. Irish free-to-air Saorview channels), as DTT uses radio spectrum licensed by ComReg which is a finite and valuable resource that must be efficiently used.



Sample Size

Nationally representative sample of n=1,007 TV decision makers in the household (with a population of 2,985) 18+ years across the Republic of Ireland.



Face-to-face Survey

Interviewing was carried out between 8th May and 3rd June 2025.



Quota Controls

Based on Census data, quotas were implemented on gender, age, region and social class, as well as more specific quotas on TV service usage and broadband.



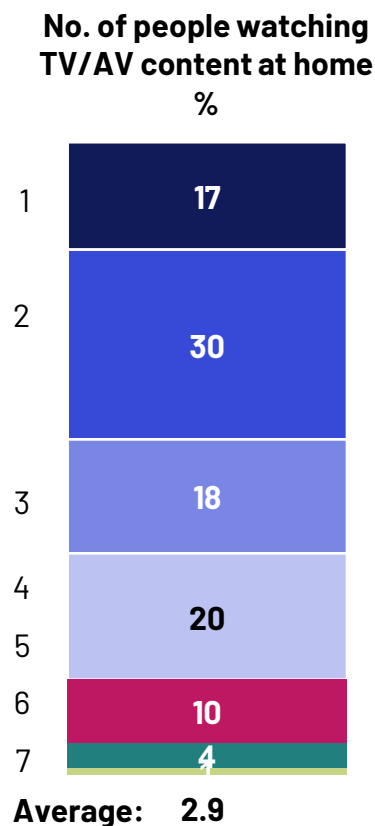
Weighting

Corrective weighting was applied by gender, age, social class and region to ensure a fully representative sample in accordance with latest Census and AIMRO data .

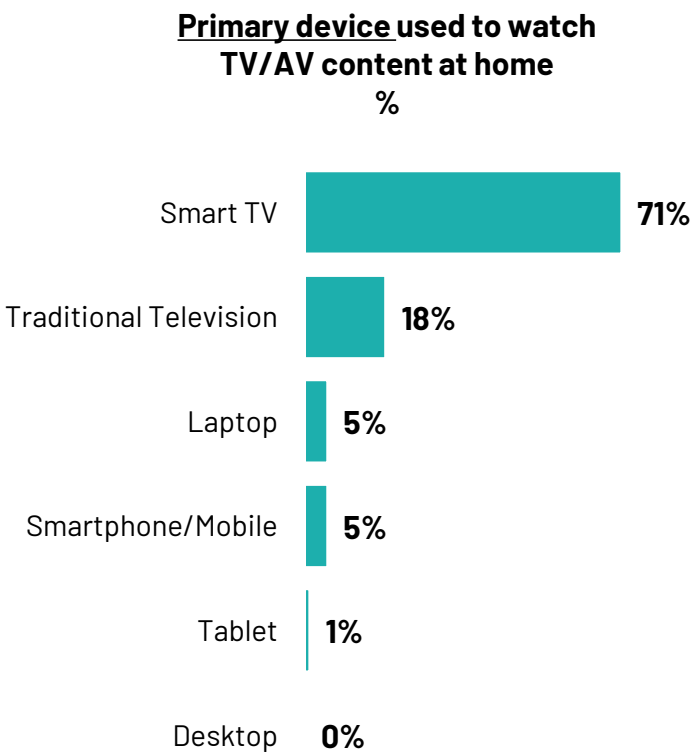
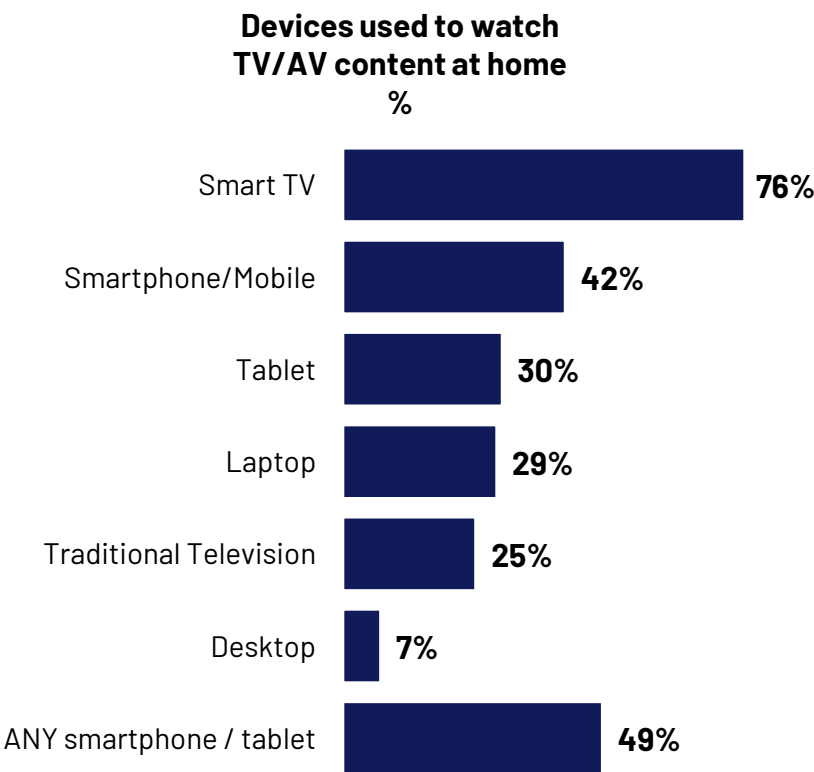
HOW ARE WE WATCHING TV IN OUR HOMES?

An overview of TV usage

There is at least one person in every house watching TV. This is predominantly via smart TVs with 3 in 4 noting they use them, and 71% citing primary use. Portable devices also feature highly in terms of TV watching – half use phone / tablet.



Overall household average: **3**



Average devices per household: 2

Q.8 How many people in your household watch any type of television/audiovisual content at home?
Q.9 What devices do people in your household use to watch television/audiovisual content while in the home?
Q.10 What is the primary device that your household uses to watch television/audiovisual content?

There is no difference
between the **average
number watching TV**
compared to the
**average number in the
household**

2.9

watching TV

VS

3

in the household

What devices are used to watch TV x demographics

Younger, Dublin-based, urban viewers are more likely to watch on the go. DTT / Saorview customers are more likely to have more traditional methods of watching TV – 60% use a traditional TV.

	Total	Age			Region				Area		Social Class		Household Size					Broadband Type							Broadband Satisfaction		Primary TV Service															
		<35	35-54	55+	Dublin	Leinster	Munster	Conn/Uls	Urban	Rural	ABC1 F 50+	C2DE F 50-	1	2	3	4	5+	Broab and via home/landline	Broab and via cable TV	Broad band over a Fibre	Mobile Broad band	Broad band by Satellite	Fixed wireless broadband	NET Satisfied	NET Dissatisfied	DTT/Saorview	Free to Air Satellite	UK Freeview	Sky Satellite	Sky Glass/Sky Stream	TV provided by Eir	TV provided by Virgin	TV provided by Vodafone	Another internet-based service	Paid OTT streaming	Free OTT streaming	Other					
Base:	1007 %	155 %	420 %	432 %	567 %	440 %	282 %	280 %	270 %	175 %	677 %	330 %	163 %	303 %	171 %	216 %	154 %	86 %	99 %	626 %	62 %	3 %	12 %	796 %	60 %	127 %	57 %	8 %	267 %	46 %	70 %	121 %	50 %	24 %	166 %	48 %	23 %					
Smart TV	76	77	82	68	82	77	73	66	80	66	80	72	53	73	80	82	86	63	83	84	73	100	78	81	88	43	68	72	79	94	85	80	87	92	86	67	55					
Smartphone/Mobile	42	55	47	26	54	38	35	40	48	31	41	43	27	32	47	46	62	22	58	45	48	-	17	43	40	21	19	-	37	36	35	53	46	46	59	64	62					
Tablet	30	38	36	18	40	28	25	27	36	20	34	26	11	23	37	37	42	23	43	35	24	31	15	34	28	13	13	-	29	34	31	39	44	10	44	43	12					
Laptop	29	42	30	18	45	21	19	32	34	20	35	24	15	22	34	38	36	13	51	32	27	-	18	32	25	21	9	-	23	14	24	42	31	25	40	51	37					
Traditional Television	25	19	18	39	17	24	30	34	21	34	23	28	46	28	28	19	10	40	16	20	14	34	17	21	22	60	35	90	25	11	26	24	18	4	10	7	15					
Desktop	7	12	6	3	10	6	7	2	8	4	9	4	2	4	10	8	10	8	7	8	-	-	5	7	8	2	6	-	5	2	19	10	6	2	6	13	3					
NET (TV)	83	92	86	72	90	81	76	82	88	72	86	79	59	81	87	90	91	68	93	90	85	100	78	88	89	58	68	72	81	94	92	86	87	96	93	92	81					
NET (Phone/Tablet)	49	61	57	31	62	45	42	45	56	35	49	49	31	37	54	56	69	33	66	52	54	31	28	51	45	25	29	-	44	46	49	57	53	50	66	72	67					
Average no. devices	2.10	2.43	2.20	1.74	2.49	1.94	1.89	2.02	2.27	1.76	2.22	1.98	1.53	1.82	2.35	2.32	2.46	1.70	2.59	2.25	1.86	1.66	1.50	2.19	2.11	1.61	1.51	1.62	1.99	1.91	2.21	2.50	2.32	1.81	2.46	2.43	1.87					

Q.9 What devices do people in your household use to watch television/audiovisual content while in the home?

Base: All respondents aged 18+ - 1,007

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Significantly higher than total

Significantly lower than total



Primary device for watching TV x demographics

DTT/Saorview households are more likely to have traditional TV as their primary device, highlighting the more basic approach to TV watching. Younger cohorts are more reliant on alternative devices such as laptops, reflecting the growth in streaming.

	Total	Age			Region				Area		Social Class		Household Size					Broadband Type							Broadband Satisfaction		Primary TV Service													
		<35	35-54	55+	Dublin	Leinster	Munster	Conn/Uls	Urban	Rural	ABC1 F 50+	C2DE F 50-	1	2	3	4	5+	Broab and via home/landline	Broab and via cable TV	Broadband over a Fibre	Mobile Broadband	Broadband by Satellite	Fixed wireless broadband	NET Satisfied	NET Dissatisfied	DTT/Saorview	Free to Air Satellite	UK Freeview	Sky Satellite	Sky Glass/Sky Stream	TV provided by Eir	TV provided by Virgin	TV provided by Vodafone	Another internet-based service	Paid OTT streaming	Free OTT streaming	Other			
Base:	1007 %	155 %	420 %	432 %	567 %	440 %	282 %	280 %	270 %	175 %	677 %	330 %	163 %	303 %	171 %	216 %	154 %	86 %	99 %	626 %	62 %	3 %	12 %	796 %	60 %	127 %	57 %	8 %	267 %	46 %	70 %	121 %	50 %	24 %	166 %	48 %	23 %			
Smart TV	71	72	76	65	77	74	68	61	75	63	76	66	50	71	71	77	81	60	76	80	65	66	78	76	84	39	65	72	77	86	76	77	86	92	78	60	53			
Traditional Television	18	9	13	31	12	18	22	21	14	26	16	20	41	20	17	11	5	33	12	11	14	34	17	14	13	49	31	28	21	6	7	20	8	4	5	-	11			
Laptop	5	12	3	1	4	3	2	12	4	5	4	5	4	6	3	6	2	6	5	3	7	-	-	4	-	9	-	-	0	-	7	-	2	-	7	15	19			
Smartphone/Mobile	5	6	6	2	4	4	7	5	5	6	3	7	5	2	7	2	11	-	4	4	13	-	-	4	2	2	2	-	1	4	10	1	5	4	7	16	17			
Tablet	1	0	2	1	2	0	1	2	1	1	1	2	1	1	1	2	1	1	2	1	1	-	-	1	-	1	-	-	1	4	-	2	-	-	2	3	-			
Other	0	-	-	0	0	-	-	-	0	-	0	-	-	0	-	-	-	-	1	-	-	-	-	0	-	-	-	-	-	-	-	1	-	-	-	-	-			

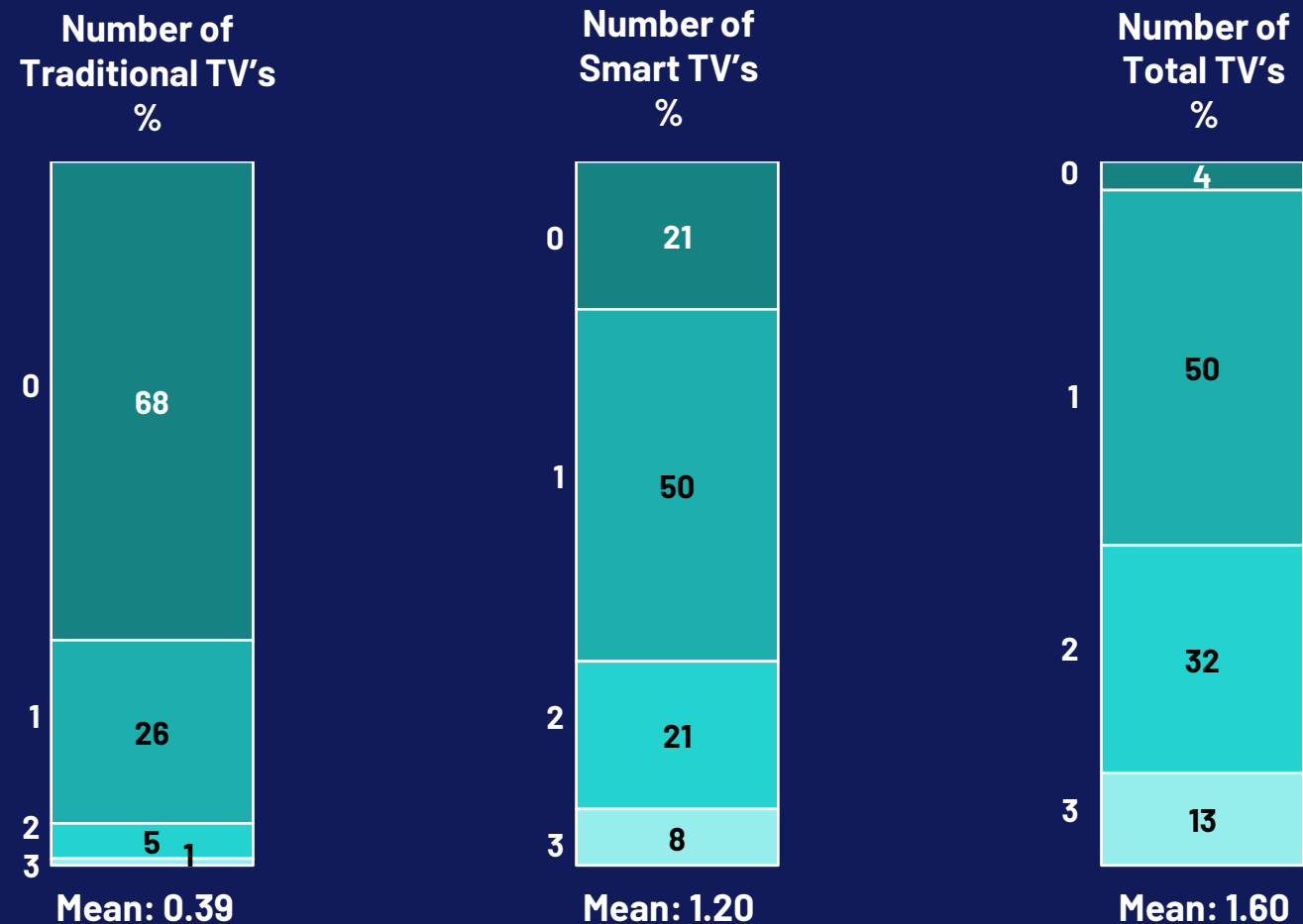
Q.10 What is the primary device that your household uses to watch television/audiovisual content?
Base: All respondents aged 18+ - 1,007
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Significantly higher than total

Significantly lower than total

Smart TVs are much more engrained in Irish households

4 in 5 have a smart TV in their household, with only 1 in 3 noting they have a Traditional TV currently. There is on average 1.6 TVs per household, highlighting multi watching, accommodating varying TV content needs for households. In total, 4% of households noted not having a TV, relying on more flexible devices such as laptops, and smartphones, etc.

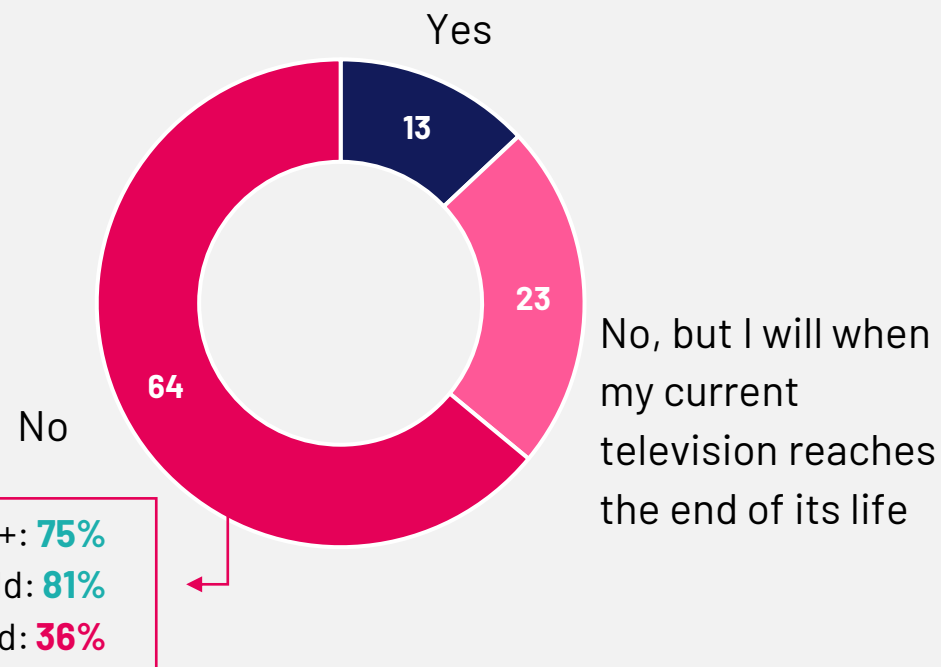


Q.11 How many Traditional Television (not Smart TV) and/or smart TV (TV that connects to the internet directly) sets are actively used for television/audiovisual content in your home?

Base: All respondents aged 18+ - 1,007

21% of respondents do not have a smart TV

Are they planning to acquire a smart TV in the next 12 to 18 months?



Among those without a smart TV, there is minimal appetite for acquiring a smart TV soon, with 2 in 3 stating they do not plan to get a smart TV, with demand even less so among older cohorts and those in a one-person household.

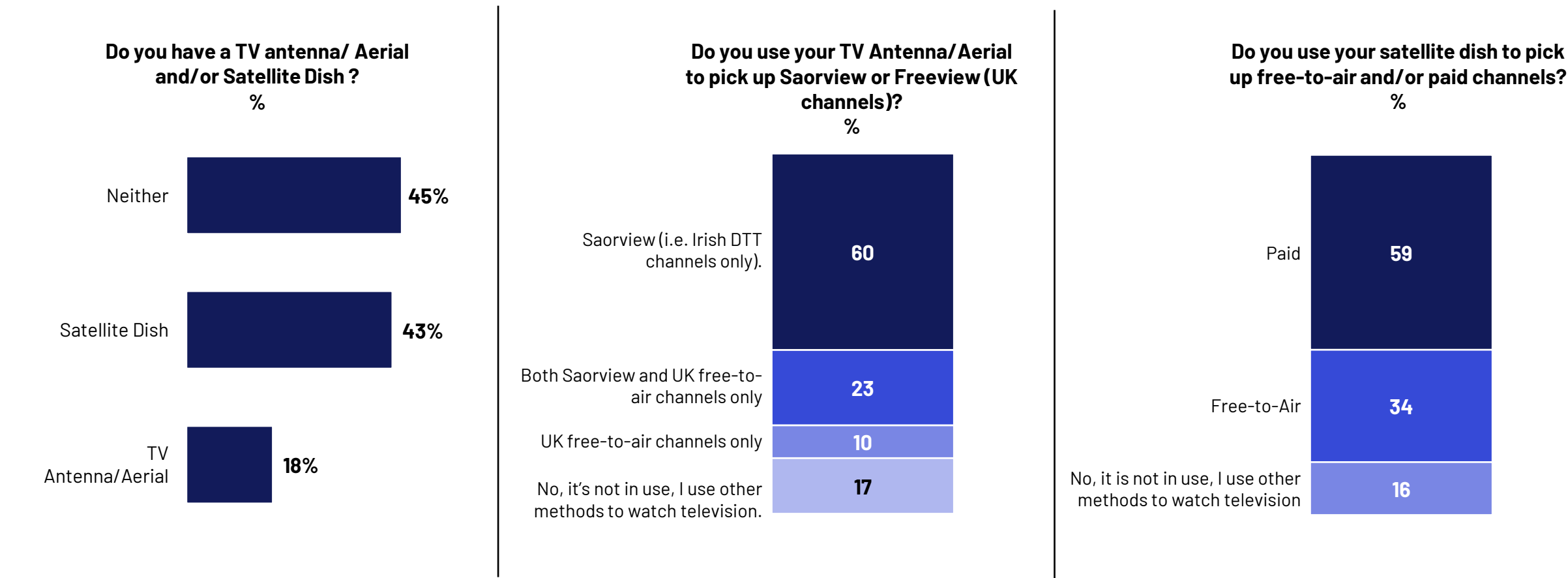
Q.12 Do you think you will acquire a Smart TV in the next 12-18 months?

Base: Those without a smart TV n - 202

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An overview of TV antenna / satellite usage

Half of households have either a TV Antenna or Satellite Dish, with a satellite dish being more prevalent (43%). Of the 18% of households with a TV aerial, 4 in 5 use this to pick up DTT / Saorview.



Q.13 Do you have a TV antenna/Aerial and/or Satellite Dish on your house regardless of whether it is connected to a television/Smart TV or not?

Q.14 Do you use your external TV Antenna/Aerial to pick up Saorview or UK channels on any televisions in your house?

Q.15 Do you use your satellite dish to pick up free-to-air and/or paid channels (e.g. Sky)?

Base: All respondents aged 18+ - 1,007; All who have TV antenna/aerial n - 174; All who have satellite dish n - 469

TV Antenna / satellite dish usage x demographics

TV Antenna / satellite dish usage is more common among older cohorts, based outside Dublin in more rural settings. Smaller households are more likely to have TV antennas, with less demand likely on TV. There is minimal overlap in terms of services used and TV infrastructure in place, with minimal mention of paid TV among those with TV antennas for example.

	Total	Age			Region				Area		Social Class		Household Size					Broadband Type						Broadband Satisfaction		Primary TV Service													
		<35	35-54	55+	Dublin	Leinster	Munster	Conn/Uls	Urban	Rural	ABC1 F 50+	C2DE F 50-	1	2	3	4	5+	Broab and via home/landline	Broab and via cable TV	Broad band over a Fibre	Mobile Broad band	Broad band by Satellite	Fixed wireless broadband	NET Satisfi ed	NET Dissati sfied	DTT/S aorvie w	Free to Air Satellit e	UK Freevie w	Sky Satellit e	Sky Glass/ Sky Stream	TV provid ed by Eir	TV provid ed by Virgin	TV provid ed by Vodafo ne	Anothe r interne t-based service	Paid OTT stream ing	Free OTT stream ing	Othe r		
Base:	1007 %	155 %	420 %	432 %	282 %	280 %	270 %	175 %	677 %	330 %	567 %	440 %	163 %	303 %	171 %	216 %	154 %	86 %	99 %	626 %	62 %	3 %	12 %	796 %	60 %	127 %	57 %	8 %	267 %	46 %	70 %	121 %	50 %	24 %	166 %	48 %	23 %		
TV Antenna/ Aerial	18	9	15	27	4	17	22	33	11	30	16	19	32	23	11	13	10	24	3	14	19	69	28	14	15	69	33	83	7	5	9	2	9	12	10	11	5		
Satellite Dish	43	32	43	51	27	52	52	41	38	52	43	43	39	49	52	38	32	45	19	47	46	66	65	43	45	31	79	36	90	33	33	8	28	19	27	17	23		
Neither	45	59	47	32	71	38	32	35	55	26	47	43	35	37	40	53	64	37	80	45	46	-	7	48	46	13	8	5	9	63	59	90	65	74	67	75	74		

Q.13 Do you have an TV antenna/Aerial and/or Satellite Dish on your house regardless of whether it is connected to a television/Smart TV or not?

Base: All respondents aged 18+ - 1,007

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Significantly higher than total

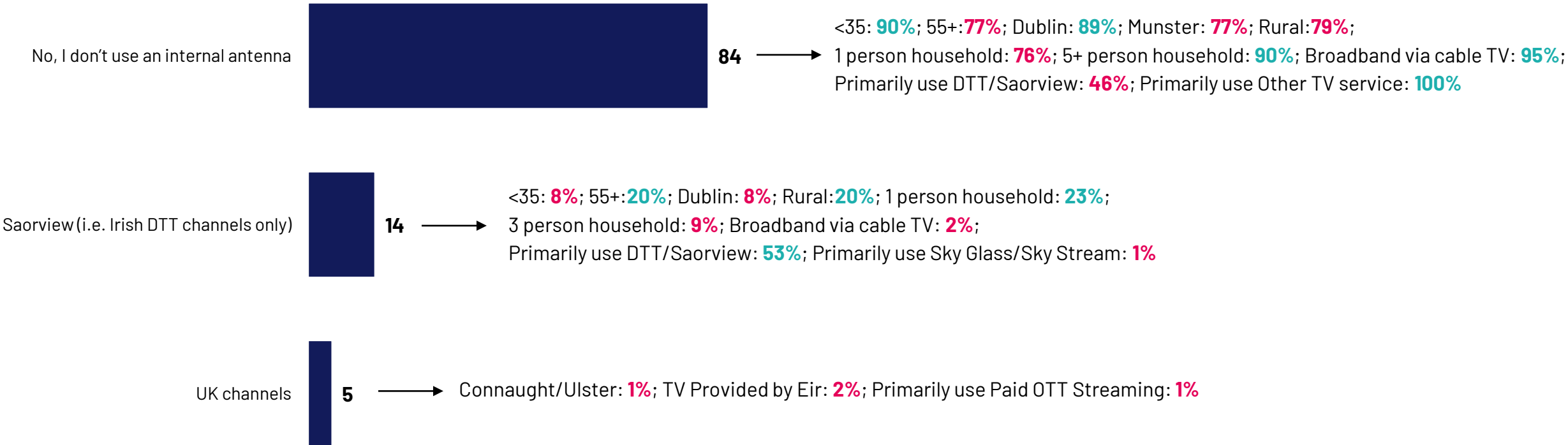
Significantly lower than total



There is minimal use of internal TV antennas to access DTT/Saorview or DTT/Freeview (UK channels)

Over 4 in 5 note they do not use internal antennas – higher among younger, Dublin-based cohorts. Those who access DTT primarily, unsurprisingly are more likely to utilize an internal antenna, given the nature of this service and the platforms needed to access.

Use of internal TV Antenna to pick up
Saorview or UK channels on any televisions in
the household?
%



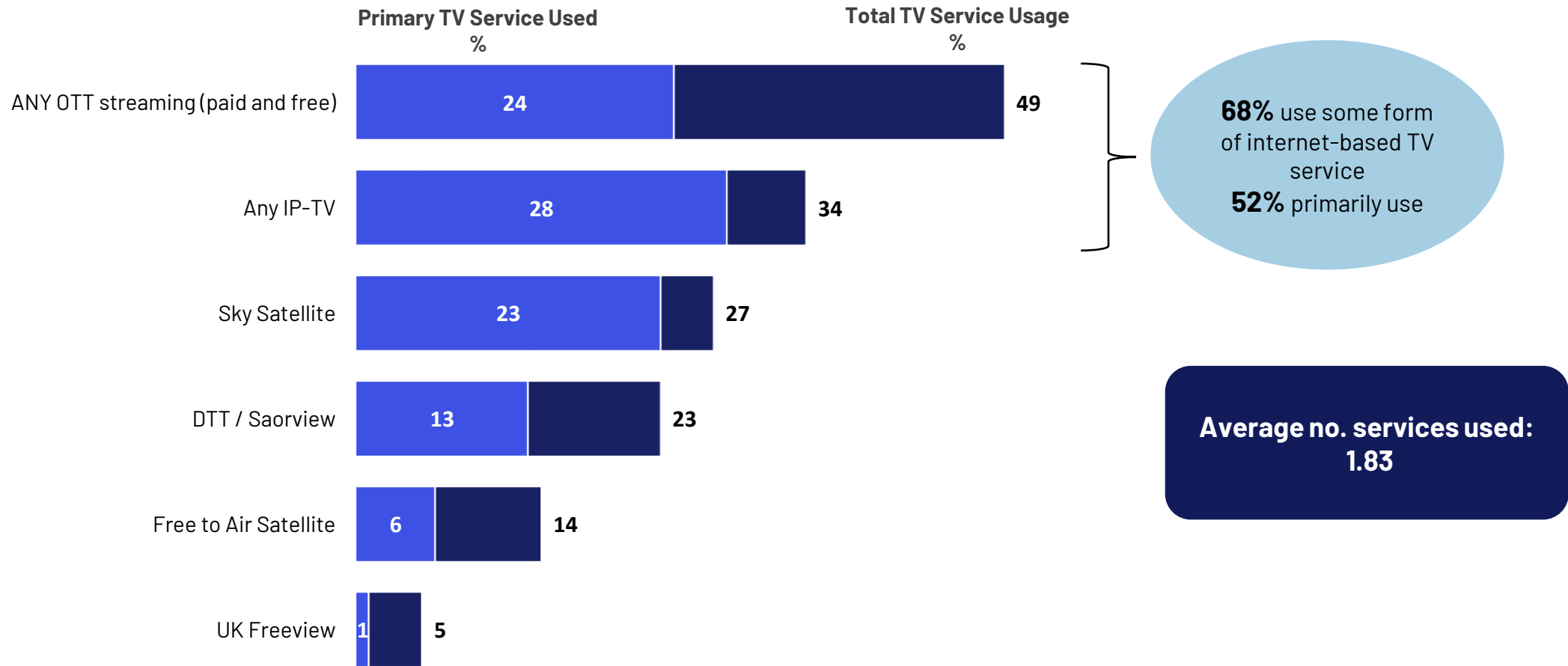
Q.16 Do you ever use an internal TV Antenna to pick up Saorview (Irish channels) or UK channels on any televisions in your house?

Base: All respondents aged 18+ n - 1007

WHAT PLATFORMS ARE WE USING TO WATCH TV?

OTT, Satellite and IP-TV are the most cited services among Irish households

Half of households use OTT services, with 2 in 5 utilising satellite services and IP-TV next most used. Irish DTT falls behind the pack with 1 in 4 citing usage, with half of these users using DTT on their primary.



Q.17 From the following list, please indicate which television/audiovisual services you use to view television/audiovisual content in your home to your primary television/Smart TV set?

Q.21 Which Television/audiovisual content service do you use most on your primary television / Smart TV set?

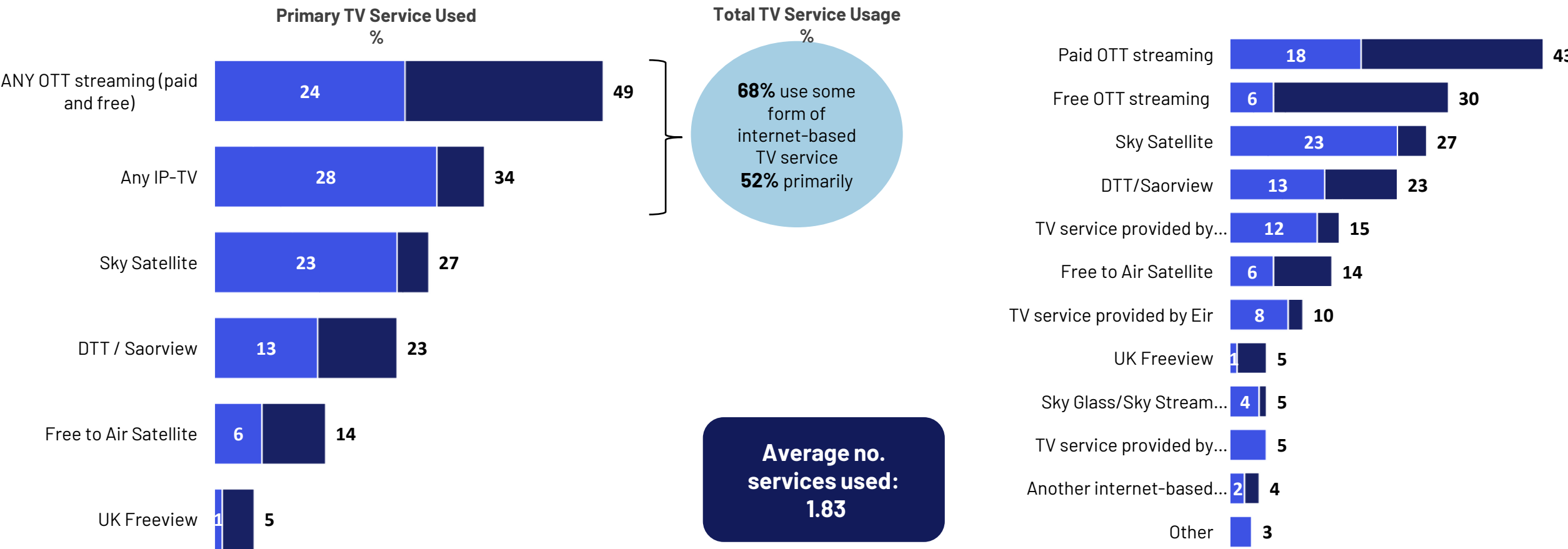
Base: All respondents aged 18+ - 1,007

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Additional descriptions were included for the answer options

OTT, Satellite and IP-TV are the most cited services among Irish households

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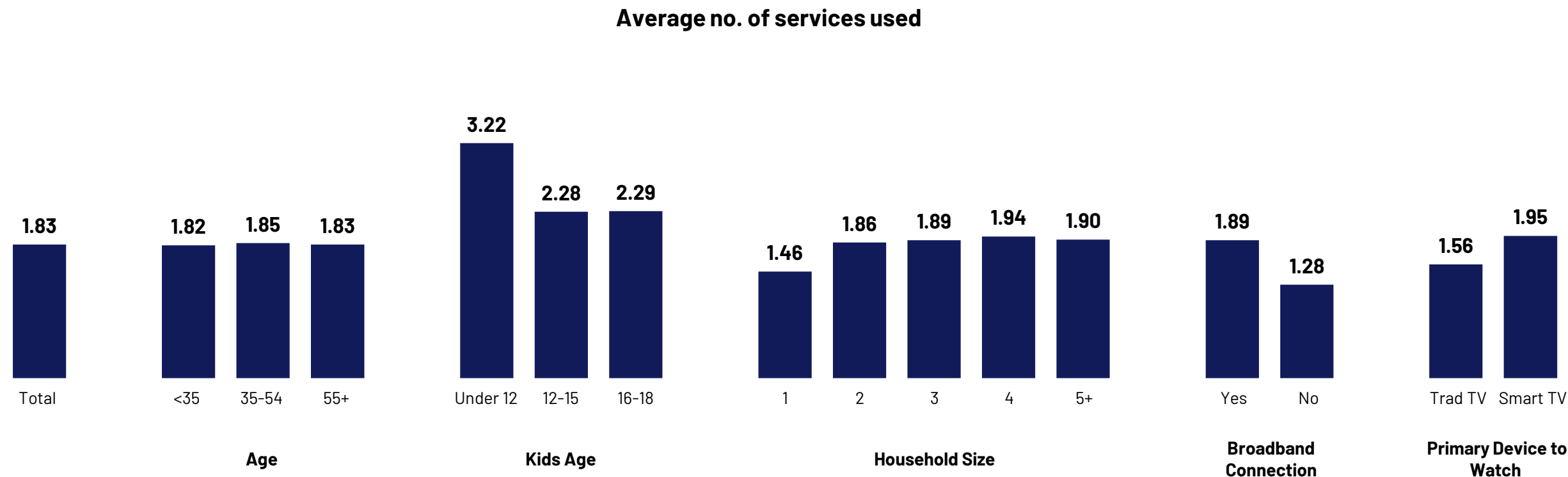
Base: All respondents aged 18+ - 1,007

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Additional descriptions were included for the answer options

The average number of TV services used x demographics

Age makes little difference in the number of services used, however the impact of having kids in the household is clear, particularly among those with kids under 12. Having broadband and a smart TV impacts as there is ease of access to alternative / advanced TV services.



Q.17 From the following list, please indicate which television/audiovisual services you use to view television/audiovisual content in your home to your primary television/Smart TV set?

Base: All respondents aged 18+ - 1,007

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TV services used x demographics

DTT/Saorview users are older living in rural areas, with fewer people per household, & lower broadband satisfaction. There is low crossover between use of DTT and primary use of more internet based TV services, illustrating less TV alternatives for DTT customers currently.

	Total	Age			Region				Area		Social Class		Household Size					Broadband Type							Broadband Satisfaction		Primary TV Service													
		<35	35-54	55+	Dublin	Leinster	Munster	Conn/Uls	Urban	Rural	ABC1 F 50+	C2DE F 50-	1	2	3	4	5+	Broadband via home/landline	Broadband via cable TV	Broadband over a Fibre	Mobile Broadband	Broadband by Satellite	Fixed wireless broadband	NET Satisfied	NET Dissatisfied	DTT/Saorview	Free to Air Satellite	UK Freeview	Sky Satellite	Sky Glass/Sky Stream	TV provided by Eir	TV provided by Virgin	TV provided by Vodafone	Another internet-based service	Paid OTT streaming	Free OTT streaming	Other			
Base:	1007 %	155 %	420 %	432 %	282 %	280 %	270 %	175 %	677 %	330 %	567 %	440 %	163 %	303 %	171 %	216 %	154 %	86 %	99 %	626 %	62 %	3 %	12 %	796 %	60 %	127 %	57 %	8 %	267 %	46 %	70 %	121 %	50 %	24 %	166 %	48 %	23 %			
Paid OTT streaming	43	53	47	32	54	40	46	27	49	31	49	37	21	36	46	55	54	21	51	51	41	-	38	46	59	12	22	11	35	43	38	36	44	28	100	34	9			
Free OTT streaming	30	33	35	21	29	26	30	34	34	21	34	25	10	29	31	35	37	19	29	32	44	-	38	32	30	15	14	5	23	31	25	20	33	26	44	96	9			
Sky Satellite	27	22	29	30	23	30	35	19	25	31	31	24	21	30	35	26	21	35	8	32	14	66	49	29	30	1	10	10	100	8	-	-	8	-	13	4	-			
DTT/Saorview	23	16	19	32	7	25	25	39	15	38	19	26	34	28	17	19	14	24	4	20	23	34	62	20	12	98	34	60	10	5	11	2	20	5	15	5	3			
TV provided by Virgin	15	15	12	17	39	2	9	2	22	1	19	10	13	15	17	15	12	3	70	11	-	-	-	17	11	3	2	-	1	-	-	98	-	10	10	2	-			
Free to Air Satellite	14	11	13	18	6	17	16	22	11	19	13	15	15	16	15	13	9	12	4	13	18	34	29	14	13	22	100	11	9	8	6	3	3	3	10	4	-			
TV provided by Eir	10	13	8	9	8	13	10	6	10	10	9	10	8	8	12	8	13	25	-	10	10	-	5	11	8	2	4	5	1	-	99	-	-	-	8	3	-			
UK Freeview	5	3	4	7	2	5	5	7	3	8	4	5	5	5	5	3	4	3	1	5	5	-	17	4	6	8	10	100	3	2	-	1	6	-	2	8	-			
Sky Glass/Sky Stream	5	4	6	5	3	10	5	2	6	4	6	4	4	7	3	5	6	-	3	8	-	-	-	6	3	-	-	-	2	99	-	-	5	-	3	1	-			
TV provided by Vodafone	5	3	6	7	5	8	5	3	6	4	6	5	7	6	3	5	8	1	2	7	9	-	-	6	8	0	2	-	1	-	-	1	98	-	3	-	-			
Another internet-based service	4	5	3	3	3	3	3	5	4	2	3	4	2	3	3	5	5	7	5	3	9	-	4	3	-	1	1	-	-	3	-	1	8	100	1	2	-			
Other	3	5	2	3	5	2	3	3	3	3	2	4	5	3	1	3	5	5	2	2	8	-	-	3	4	-	1	5	1	3	-	-	4	4	3	2	62			

Q.17 From the following list, please indicate which television/audiovisual services you use to view television/audiovisual content in your home to your primary television/Smart TV set?

Base: All respondents aged 18+ - 1,007

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Significantly higher than total

Significantly lower than total



Primary TV service x demographics

DTT is a primary service for older, rural cohorts, predominantly based in Connacht/Ulster. Few users primarily use DTT when they have other TV services.

	Total	Age			Region				Area		Social Class		Household Size					Broadband Type						Broadband Satisfaction		Content Services used													
		<35	35-54	55+	Dublin	Leinster	Munster	Conn/Uls	Urban	Rural	ABC1 F 50+	C2DE F 50-	1	2	3	4	5+	Broadband via home/landline	Broadband via cable TV	Broadband and over a Fibre	Mobile Broadband	Broadband by Satellite	Fixed wireless broadband	NET Satisfied	NET Dissatisfied	DTT/Saorview	Free to Air Satellite	UK Freeview	Sky Satellite	Sky Glass/Sky Stream	TV provided by Eir	TV provided by Virgin	TV provided by Vodafone	Another internet-based service	Paid OTT streaming	Free OTT streaming	Other		
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Sky Satellite	23	17	25	27	19	23	33	16	21	27	25	22	21	27	30	21	15	33	8	27	14	31	25	25	24	10	15	14	85	11	2	2	3	-	19	18	7		
Paid OTT streaming	18	31	21	6	22	20	17	13	21	13	23	14	6	12	18	28	26	7	18	22	22	-	22	19	30	12	13	6	9	12	15	13	9	7	42	28	15		
DTT/Saorview	13	6	10	21	4	13	11	29	7	25	10	16	27	18	4	9	7	13	2	8	16	34	39	9	8	55	20	22	0	-	3	2	1	4	3	6	-		
TV service provided by Virgin	12	11	10	15	32	1	8	2	18	0	15	9	12	13	14	12	9	3	61	8	-	-	-	14	8	1	3	1	-	-	-	80	2	3	10	8	-		
TV service provided by Eir	8	11	6	7	6	10	9	4	7	8	6	9	4	7	10	5	12	19	-	8	10	-	-	9	6	4	3	-	-	-	77	-	-	-	7	6	-		
Free to Air Satellite	6	4	5	7	1	7	7	7	4	8	4	7	9	6	6	5	3	7	1	4	9	34	5	5	4	8	39	12	2	-	2	1	2	2	3	3	2		
Free OTT streaming	6	5	9	2	4	6	2	13	5	6	4	7	3	3	7	7	8	6	1	6	9	-	6	5	3	1	2	10	1	1	1	1	-	3	4	18	4		
TV service provided by Vodafone	5	3	4	6	4	7	4	3	5	3	5	5	6	5	2	3	7	-	2	6	5	-	-	5	8	4	1	6	1	5	-	-	83	10	5	5	5		
Sky Glass/Sky Stream provided by Sky	4	2	5	4	2	7	3	2	4	2	4	3	2	5	2	4	4	-	2	6	-	-	3	4	2	1	2	1	1	70	-	-	-	3	4	4	3		
Another internet-based service	2	4	2	1	2	1	3	5	3	1	2	3	1	1	3	4	3	6	3	2	5	-	-	2	-	1	0	-	-	-	-	2	-	69	2	2	3		
UK Freeview	1	2	1	1	1	0	1	4	0	3	1	2	1	1	4	0	-	1	-	2	-	-	-	1	1	3	1	26	0	-	1	-	-	-	0	0	2		
Other	3	4	3	2	4	4	2	2	3	3	1	5	6	2	-	2	7	5	1	2	8	-	-	2	5	0	-	-	-	-	-	-	-	1	1	59			

Q.21 Which Television/audiovisual content service do you use most on your primary television / Smart TV set?

Base: All respondents aged 18+ - 1,007

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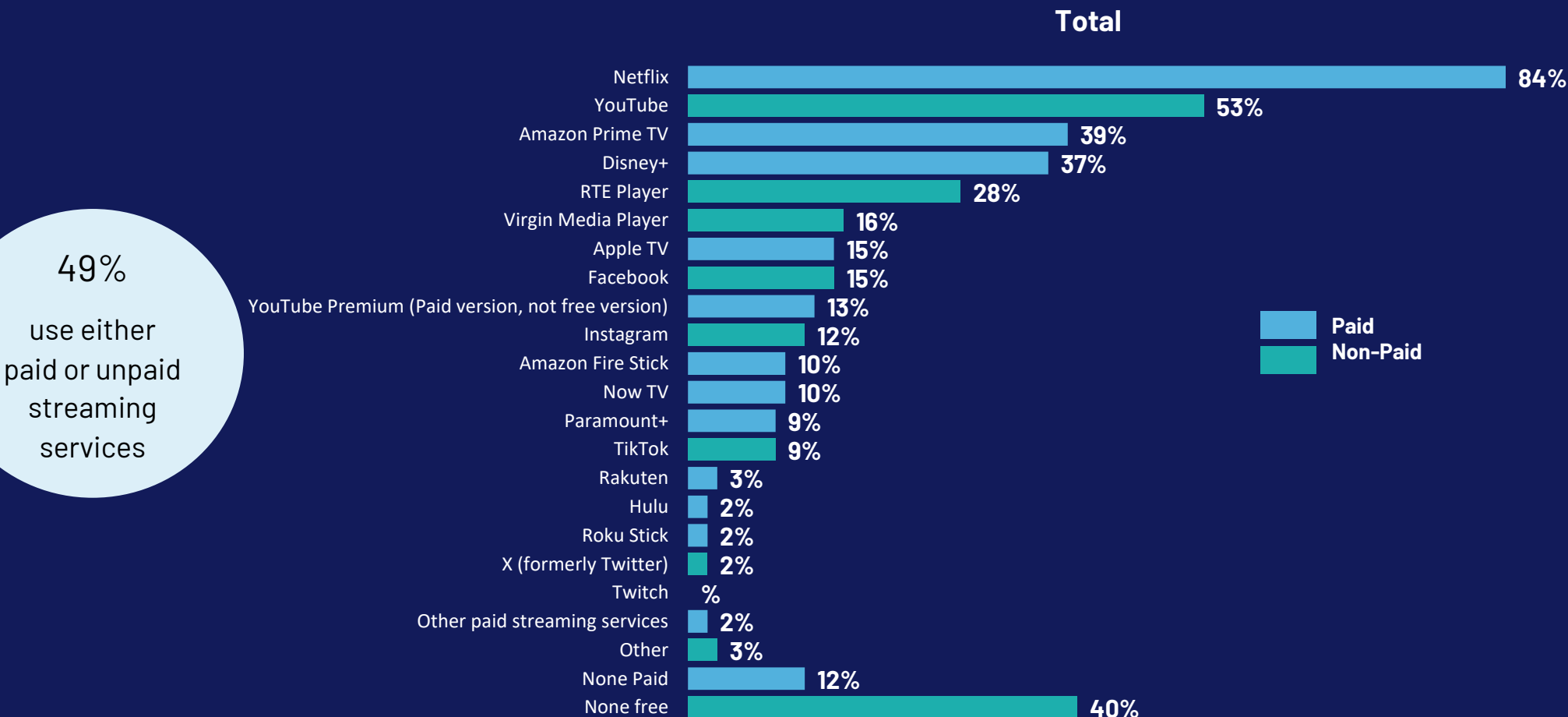
Significantly higher than total

Significantly lower than total



Streaming service used by households that use streaming services

Netflix is the leader among the those using OTT streaming, with YouTube being used by just over half (rising to 58% when including paid users). Competitors fall much further behind with 2 in 5 citing Amazon Prime TV and 1 in 4 noting RTE.



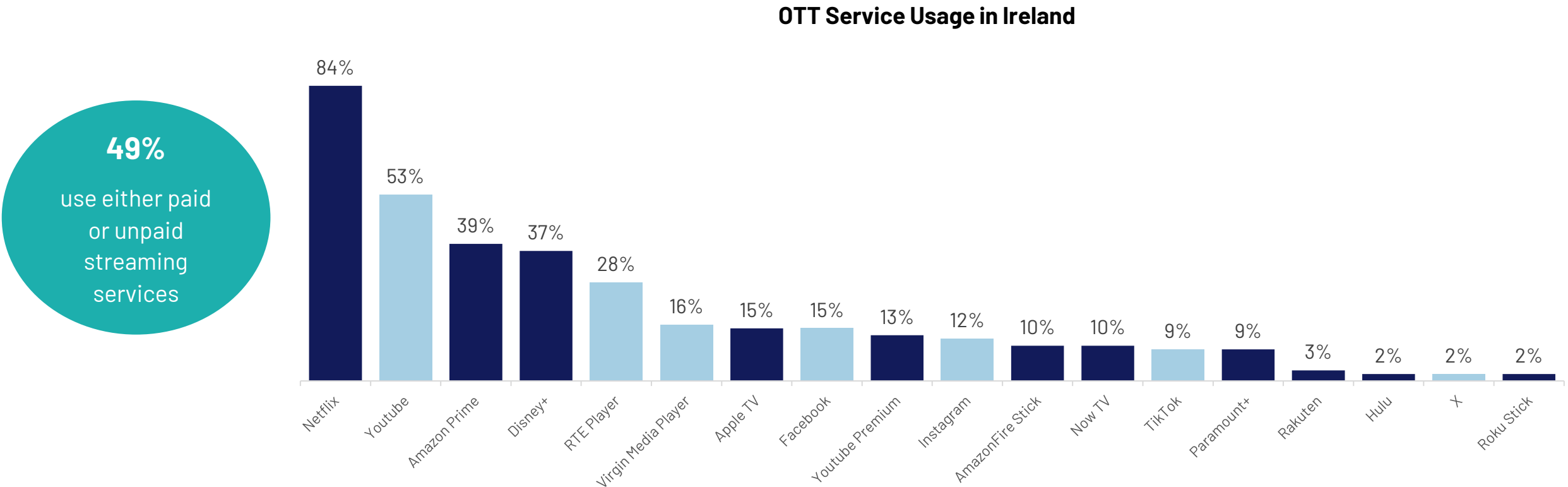
Q.18 Which of the following streaming services are viewed on any television in your household, by anyone in the household, anywhere in your household?

Q.19 Which of the following non-paid streaming services are used in your household?

Base: Use any OTT streaming service n = 487

Netflix (paid) & YouTube (non-paid) lead the way in terms of streaming with competitors falling behind significantly

Netflix is the leader among the those using OTT streaming, with YouTube being used by just over half. Competitors fall much further behind with 2 in 5 citing Amazon Prime TV and 1 in 4 noting RTE. To



Q.18 Which of the following streaming services are viewed on any television in your household, by anyone in the household, anywhere in your household?

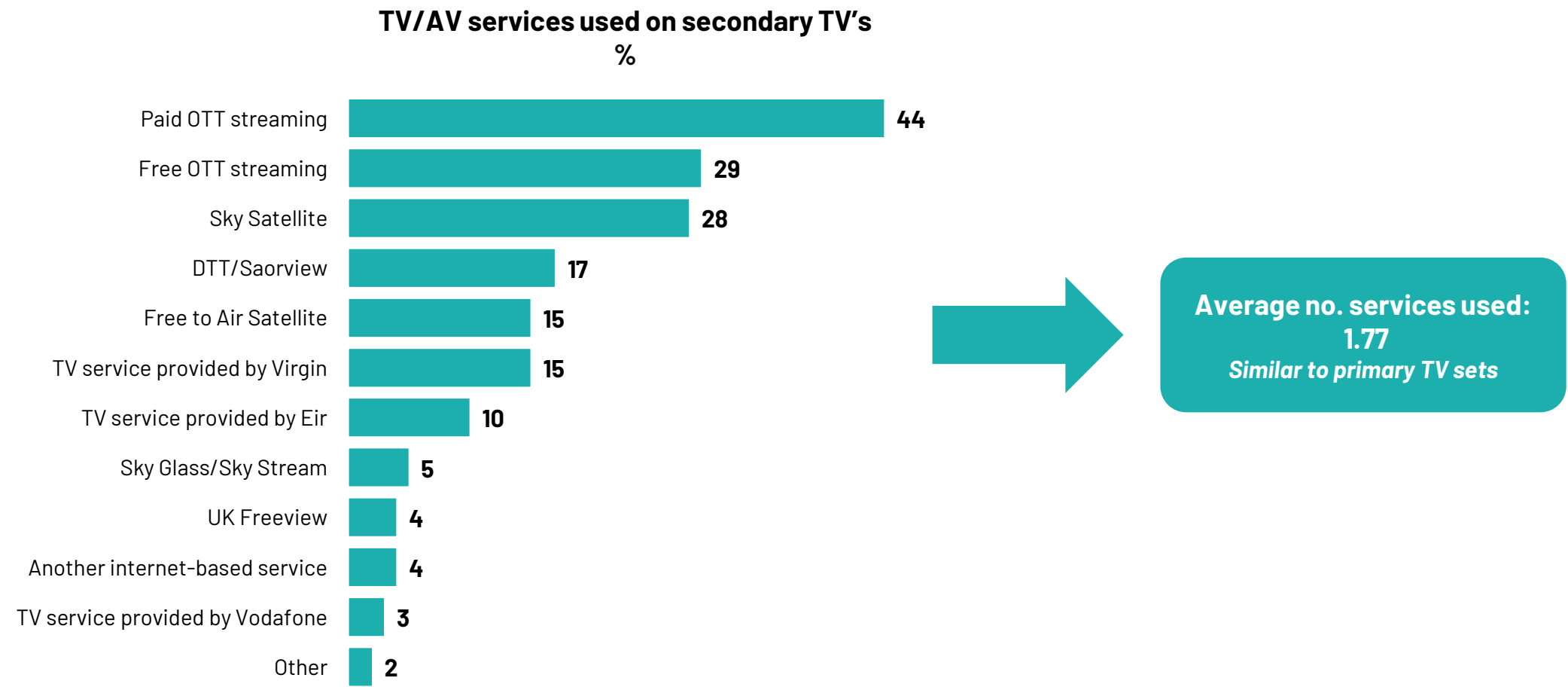
Q.19 Which of the following non-paid streaming services are used in your household?

Base: Use any OTT streaming service n – 487

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Secondary TV set services largely mirror primary TV sets

This highlights the individual demands in multi-person households and the ease at which consumers can access TV services. Again, streaming and Sky dominate overall.

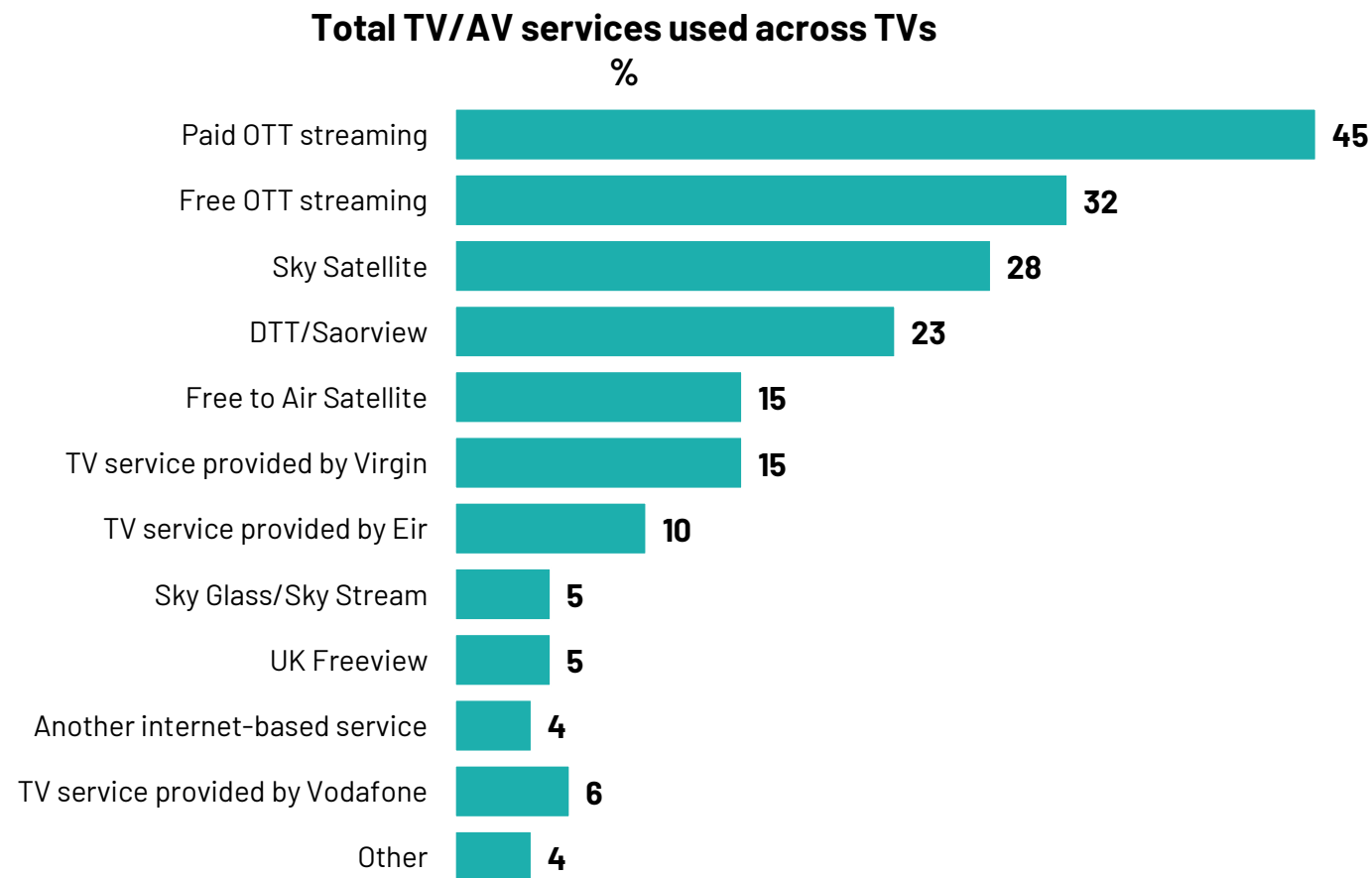


Q.25 From the following list, please indicate which television/audiovisual services you use to view television/audiovisual content in your home on your secondary televisions?

Base: All with more than one TV in the home n = 464

Total TV services do not differ largely from the numbers seen for primary / secondary TV sets, illustrating the strong crossover

Streaming remains the leading services cited, with Sky and DTT being noted by 1 in 4 of the sample.



Q.17 From the following list, please indicate which television/audiovisual services you use to view television/audiovisual content in your home to your primary television/Smart TV set?
Q.21 Which Television/audiovisual content service do you use most on your primary television / Smart TV set?
Base: All respondents - 1,007

Secondary TV set services x primary TV set services

There is clear correlation between primary TV set services and secondary TV set services – those with specific primary TV set services, also cite the same secondary TV set services much more readily.

	Total	Content Services Used											
		DTT/ Saorview	Free to Air Satellite	UK Freeview	Sky Satellite	Sky Glass/Sky Stream	TV provided by Eir	TV provided by Virgin	TV provided by Vodafone	Another internet- based service	Paid OTT streaming	Free OTT streaming	Other
Base:	464 %	112 %	74 %	25 %	165 %	36 %	49 %	76 %	21 %	18 %	234 %	160 %	14 %
Paid OTT streaming	44	33	29	24	45	61	55	29	51	47	79	68	71
Free OTT streaming	29	27	24	11	26	40	33	19	38	31	47	68	63
Sky Satellite	28	16	29	20	80	18	2	3	3	-	25	22	15
DTT/Saorview	17	65	37	61	13	7	12	6	13	-	11	14	14
Free to Air Satellite	15	33	68	43	13	10	7	5	19	27	9	16	16
TV service provided by Virgin	15	6	3	2	1	-	1	87	12	4	14	11	8
TV service provided by Eir	10	6	5	7	1	5	86	1	7	2	13	11	-
Sky Glass/Sky Stream	5	4	2	-	3	70	-	-	10	9	5	5	5
UK Freeview	4	11	11	51	4	-	1	3	9	-	2	4	4
Another internet-based service	4	7	4	-	1	6	-	1	13	68	3	5	8
TV service provided by Vodafone	3	3	2	7	2	6	1	3	74	13	5	7	6
Other	2	-	1	-	2	2	-	2	4	4	2	5	36

Q.25 From the following list, please indicate which television/audiovisual services you use to view television/audiovisual content in your home on your secondary televisions?

Base: All with more than one TV in the home n - 464

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	Significantly higher than total
	Significantly lower than total

16% of respondents use different secondary TV set services compared to primary TV

Why do the TV services differ?



My provider charges an additional cost to extend the service to other rooms

53%

I would need to install additional cables to connect in other rooms – too much hassle

37%

Other

9%

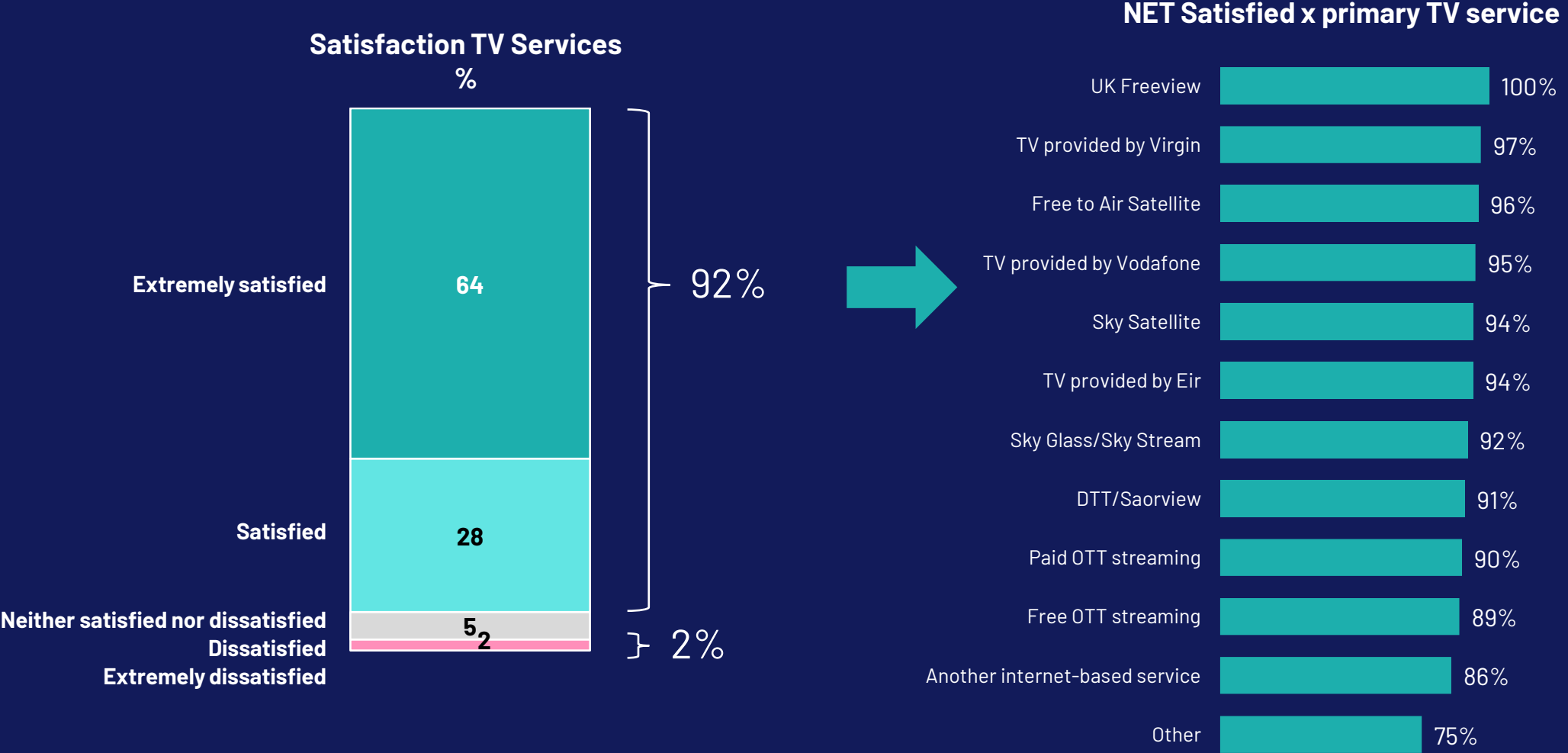
For most, TV services are the same across both primary and secondary TVs. For the 16% that differ, the main factor is additional cost.

Q.26 Why are the audio-visual services for your secondary televisions different from that provided to your primary television?

Base: Those using different AV service on secondary device to primary device n = 73

There is near universal satisfaction with consumers' primary TV service, with minimal variance across the services

92% are satisfied, with nearly 2 in 3 noting extreme satisfaction. This strong satisfaction is felt across all TV services, including DTT (91%).



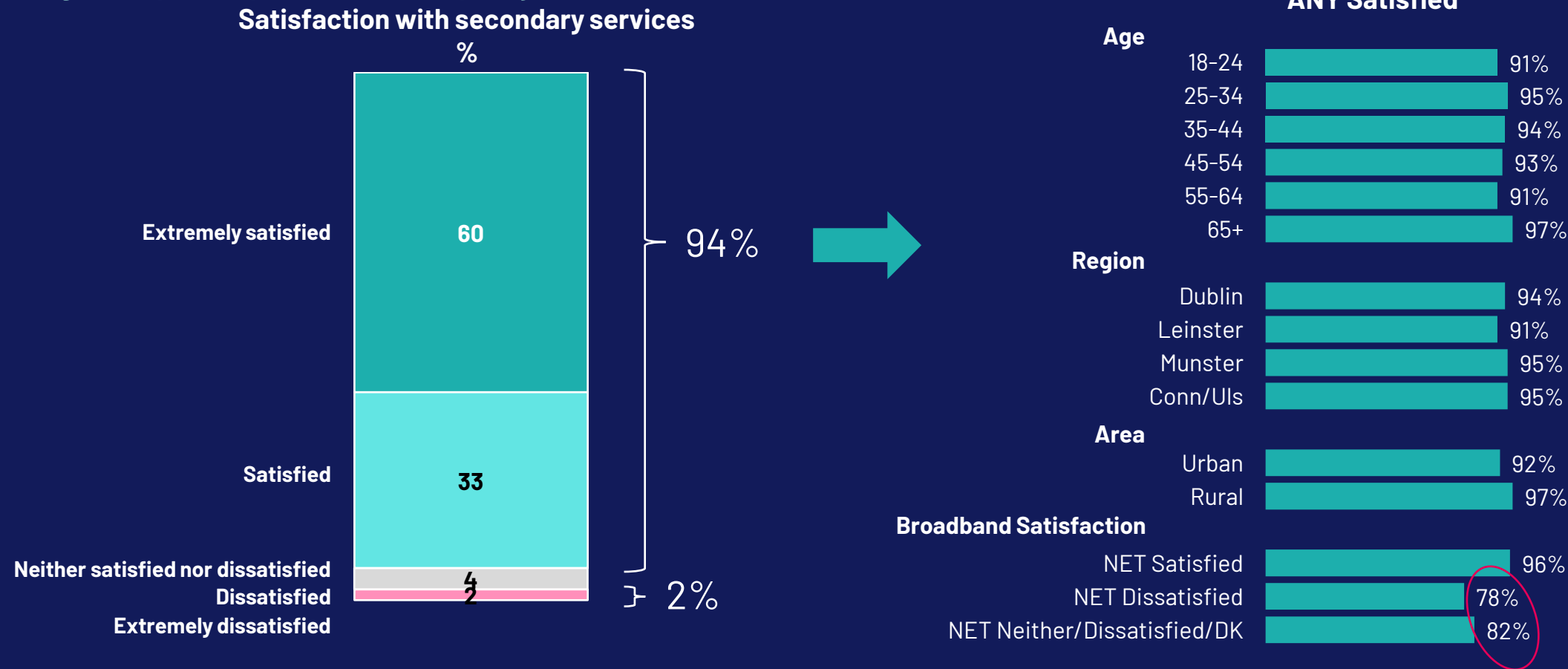
Q.22 How satisfied are you with this service - All

Base: All respondents aged 18+ - 1,007

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Much like primary TV services, there is near universal satisfaction with services on secondary TVs given the generally mirroring of services

94% are satisfied with their secondary TV services, with minimal variance across demographics. However, broadband satisfaction impacts with consumers noting lower satisfaction with broadband also noting lower satisfaction with their TV services, possibly illustrating the impact of poor broadband quality.



Q.27 How satisfied are you with the technical quality of your current secondary services in satisfying your household requirements?
Base: All with more than one TV in the home n - 464

DTT USAGE IN IRELAND



7% of households state they only use DTT on their primary TV

Do they watch the Irish Free to Air channels (either on their TV or online)?



Sole DTT Users are more likely to be:

Connacht / Ulster – **19%**

Rural – **15%**

55+ years old – **13%**

No Broadband Connection – **34%**

Yes, via Saorview (i.e., using the aerial)



78%

No, I don't watch the 'Irish Free to Air' Channels



18%

Yes, online via the RTE Player, Virgin Media Player, or TG4 Seinnteoir



11%

There is minimal watching of Free to Air channels online, with the vast majority accessing via TV aerial.

Q.17 From the following list, please indicate which television/audiovisual services you use to view television/audiovisual content in your home to your primary television/Smart TV set?

Q.20 Do you ever watch the Irish 'Free to Air' channels on one of your TV services or online?

Base: All respondents aged 18+ – 1,007; Those who ONLY use DTT/Saorview n – 66

The current reliance on DTT

Just over 1 in 10 primarily use DTT on their primary TV set, with roughly of these solely using DTT.

Current reliance on DTT	Households	People per household
DTT Primarily	13%	2.5
DTT Only	7%	2.2
DTT Only, with no broadband	3%	1.4
DTT Only, with broadband but no Smart TV	2%	2.7

Q.35a Which Irish Free to Air channels do you watch at least once a week on a Television in your home?

Q.35b Are you able to access (channel selected in Q35a) online on any device if needed?

Base: All respondents aged 18+ - 1,007

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FTA channels are highly watched, with good awareness of how to access FTA channels online

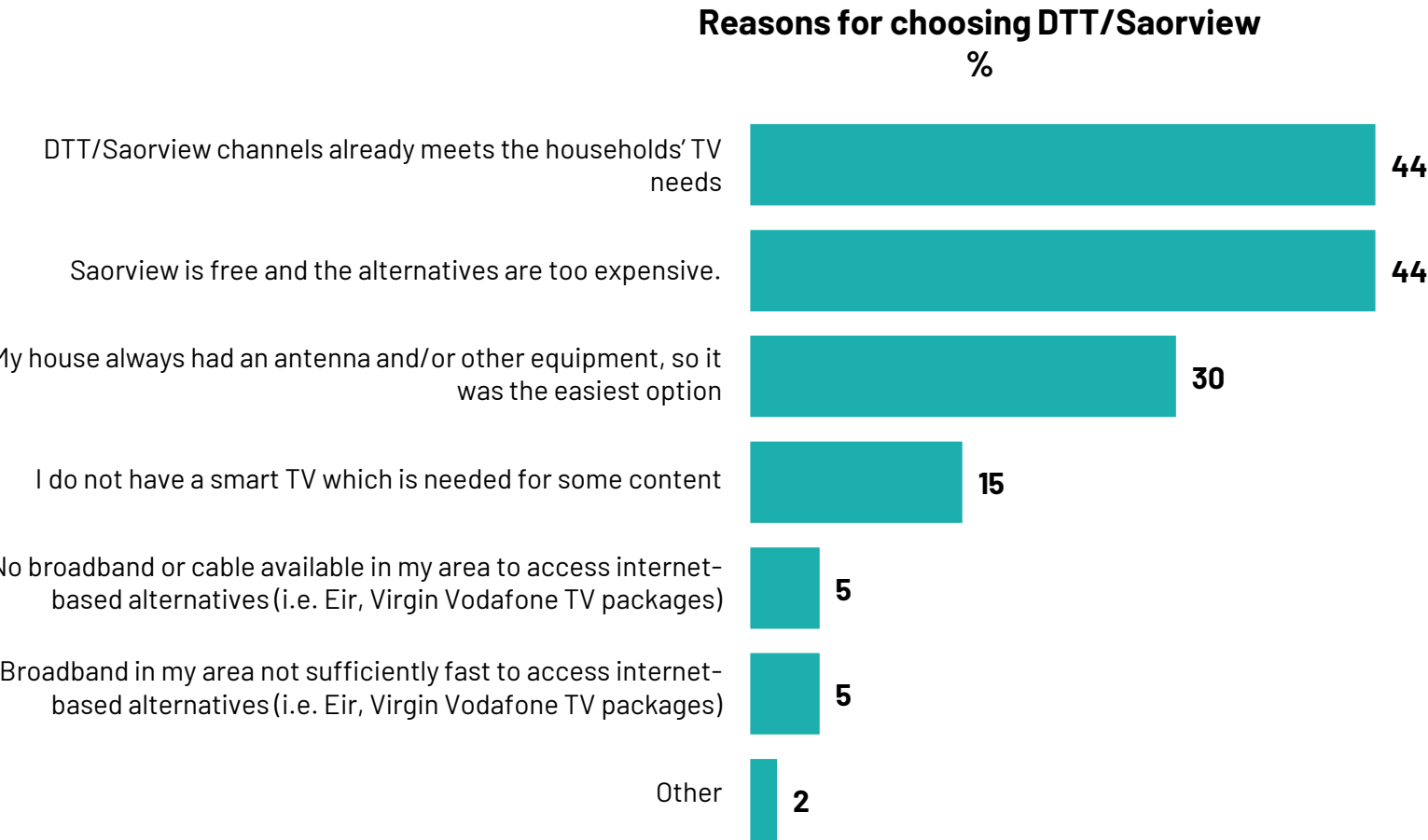
RTE One, RTE2, and Virgin Media 1 have the highest number of viewers. Though there is generally strong understanding of accessing the channels online, this is consistently lower among primary DTT households.

TV SERVICE	Base:	How many watch on a weekly basis?	Base:	How many can access online?
RTÉ One	(1007)	66%	(706)	70% (54%)
RTÉ2	(1007)	53%	(561)	69% (52%)
Virgin Media 1	(1007)	55%	(574)	69% (50%)
TG4	(1007)	43%	(451)	65% (43%)
Virgin Media 2	(1007)	37%	(368)	68% (45%)
Virgin Media 3	(1007)	32%	(328)	65% (37%)
Virgin Media 4	(1007)	26%	(263)	65% (29%)
RTÉ Junior	(1007)	18%	(189)	81% (72%)
RTÉ News	(1007)	43%	(461)	67% (46%)
Tithe an Oireachtais	(1007)	14%	(146)	70% (38%)
Sky News	(1007)	35%	(376)	70% (51%)

Q.35a Which Irish Free to Air channels do you watch at least once a week on a Television in your home?
 Q.35b Are you able to access (channel selected in Q35a) online on any device if needed?
 Base: All respondents aged 18+ - 1,007
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Reasons for choosing DTT/Saorview varies, however it is largely seen as a default, cost-free TV service that covers the needs of the household

Just under half of those choosing DTT as their primary TV service cited the cost-free element as well as noting that the service covers the households needs.



Q.28 What made you choose DTT/Saorview as your primary television service over others?
Base: Those primarily using DTT/Saorview as primary television service n = 127

MIGRATION FROM DTT/SAORVIEW

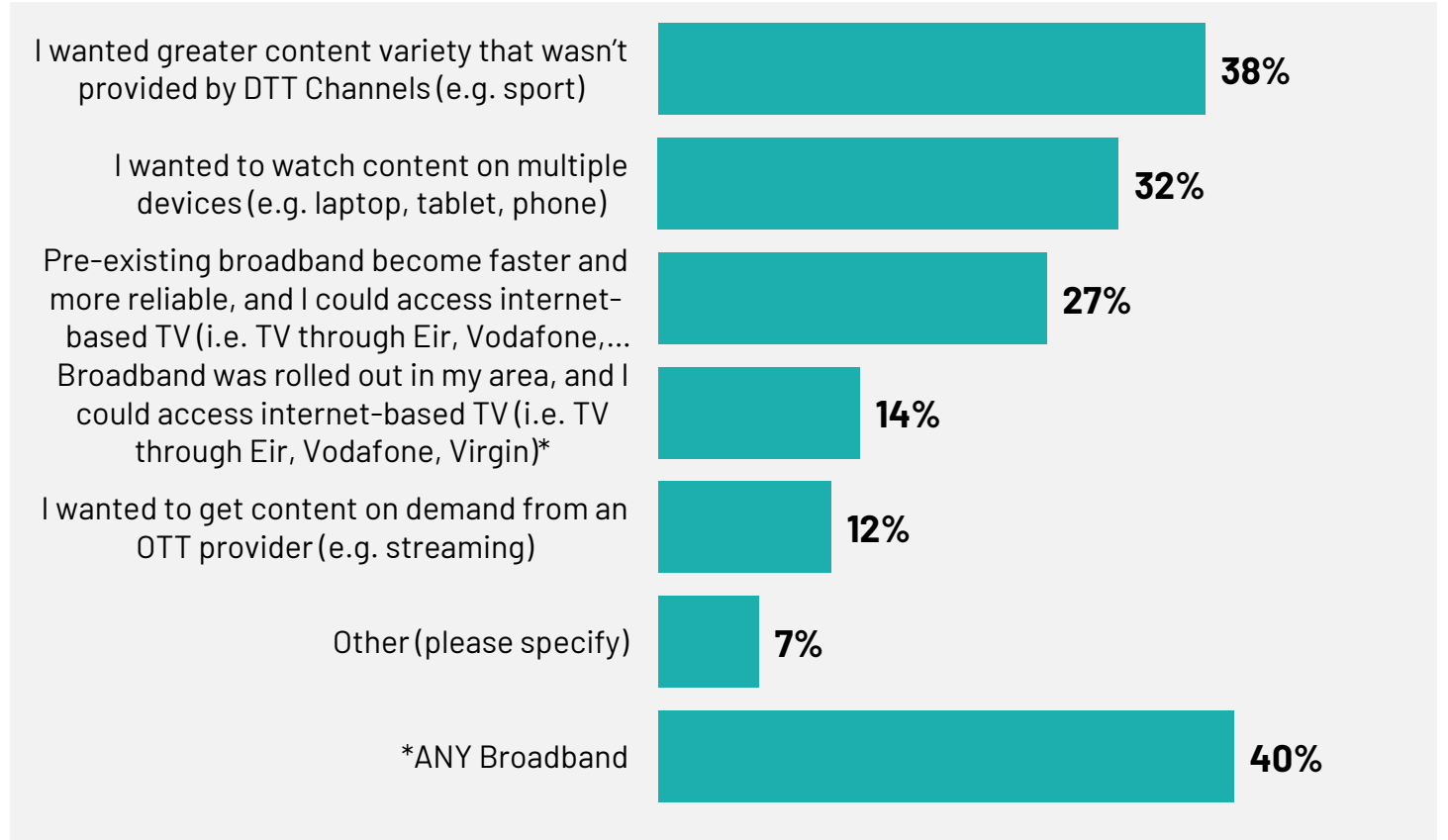


In the last 3 years, 3% of all households migrated from primarily watching DTT/Saorview to a paid service

Why did they switch?



This equates to a **20%** reduction in "primarily DTT" households in 3 years



Migration appears driven by broadband availability and speed (40%), as well as content variety, the ability to watch on multiple devices easily (i.e. no installation), which IP-TV and paid OTT offers.

Q.33 Have you moved from 'Free to Air' Options (e.g., DTT/Saorview) to a paid TV platform (e.g. Sky, Virgin etc) and/or free online players (e.g., RTE Player) or apps (e.g., YouTube) as your most used service on your primary television, in the past three years?

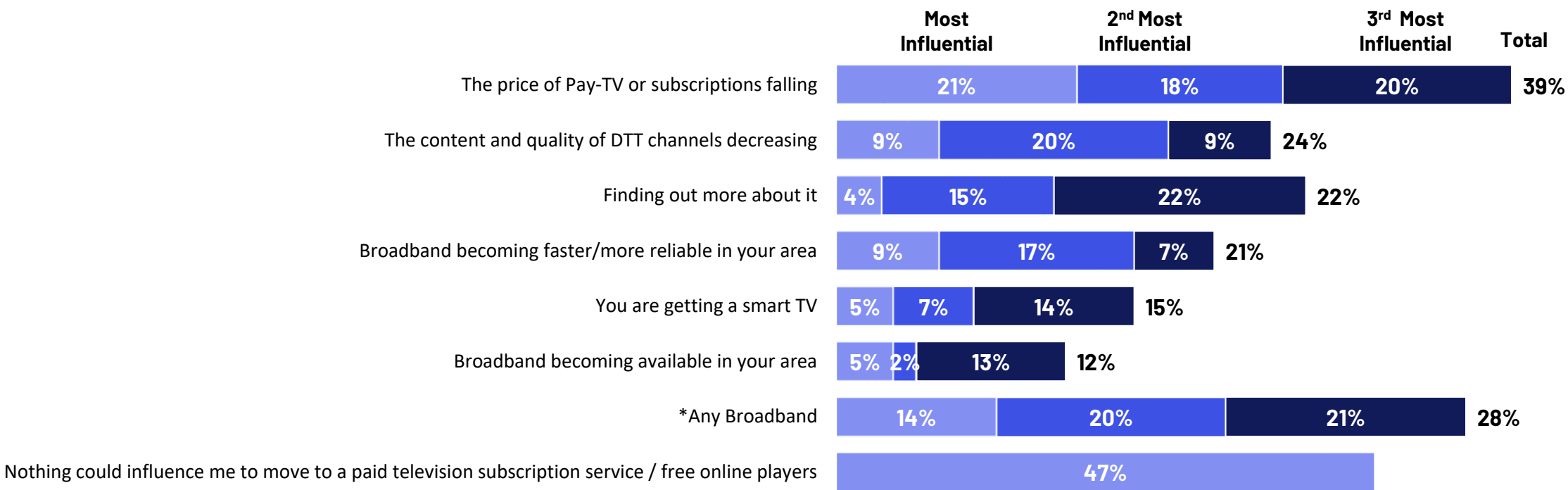
Q.34 What was your main reasons for switching?

Base: All decision-makers n=1007; Those switching from Free-to-air to Paid platforms n = 30

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Half of primarily DTT/Saorview users would consider migrating under certain circumstances (e.g., cost, broadband availability)

Those that would switch are sensitive to the price of alternatives and availability of broadband, and understanding more



Q.29 Please rank from 1 to 3, which factor would make you more likely to move to a paid television subscription service and/or use free online players (e.g., RTE Player) or apps (e.g., YouTube) as your primary television service, with 1 being the most influential, 2 being second most influential, and three being the third most influential.

Base: Those primarily using DTT/Saorview as primary television service n - 127

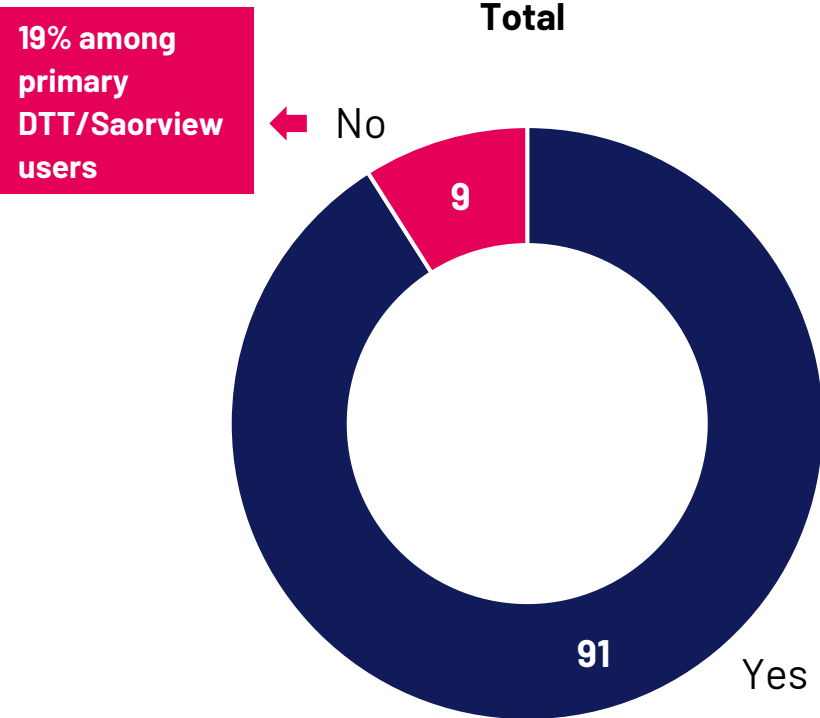
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*Broadband becoming available, faster or more reliable

BROADBAND USAGE IN HOMES

Near universal use of Broadband

Only 9% note they do not have broadband, however this increases to 19% among primary DTT/Saorview users.



Q.1 Do you have a broadband connection installed at your home? (that is, one connected to a phone line, a fibre connection, or cable TV provider)

Base: All respondents aged 18+ - 1,007

Broadband ownership x demographics

Older, rural, working class cohorts show lower broadband ownership. DTT / Saorview users are also less likely to have broadband, particularly those who solely have DTT / Saorview.

	Total	Age			Region				Area		Social Class		Number in Household					Primary TV service														DTT Saorview Only
		<35	35-54	55+	Dublin	Leinster	Munster	Connau ght/Ulster	Urban	Rural	ABC1 F5 0+	C2DE F5 0-	1	2	3	4	5+	DTT/Sa orview	Free to Air Satellite	UK Free view	Sky Satellite	Sky Glass/S ky Stream	TV provide d by Eir	TV provide d by Virgin	TV provide d by Voda- fone	Another internet -based service	Paid OTT streami ng	Free OTT streami ng	Other			
Base:	1007	155	420	432	282	280	270	175	677	330	567	440	163	303	171	216	154	127	57	8	267	46	70	121	50	24	166	48	23	66		
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%		
Yes	91	91	96	85	98	90	90	83	94	84	95	86	72	90	95	97	94	70	71	89	95	100	98	98	100	95	95	93	72	58		
No	9	8	4	15	2	9	10	17	5	16	5	14	28	10	5	2	6	30	24	11	5	-	2	2	-	5	5	7	28	42		

Significantly higher than total

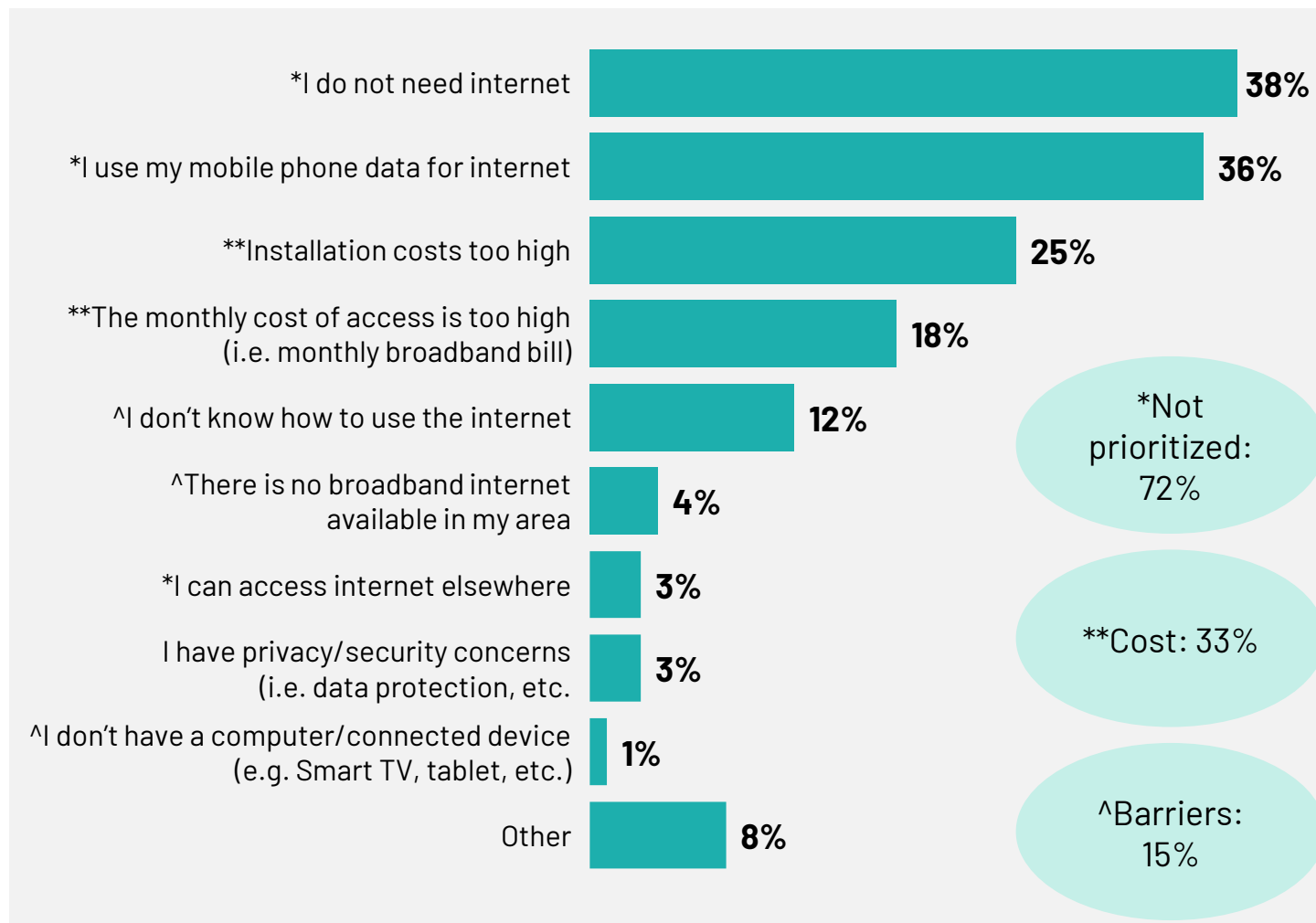
Significantly lower than total

Q.1 Do you have a broadband connection installed at your home? (that is, one connected to a phone line, a fibre connection, or cable TV provider)
Base: All respondents aged 18+ - 1,007



9% of respondents don't have broadband

What are the reasons for **not having broadband**?



For most of those without broadband, it seems this is simply not prioritised (72%) with minimal mention of barriers in terms of services or understanding (15%), albeit cost is more frequently mentioned with 1 in 3 noting this.

Q.2 Why do you not have a broadband connection installed at your home?

Base: Those without broadband at home n – 87

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Reasons for respondents not having broadband x demographics

	Total	Resp Age			Region				Area		Social Class		Number in Household					Primary TV service									DTT Saorview Only
		<35	35-54	55+	Dublin	Leinst er	Munst er	Conna ught/U lster	Urban	Rural	ABC1F 50+	C2DEF 50-	1	2	3	4	5+	DTT/S aorvie w	Free to Air Satellit e	UK Freevi ew	Sky Satellit e	TV provid ed by Eir	TV provid ed by Virgin	Paid OTT stream ing	Free OTT stream ing	Other	
UNWTD	87	12	13	62	8	27	26	26	37	50	26	61	44	28	7	3	5	36	14	2	14	2	2	6	4	6	27
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
I do not need internet	38	6	4	62	56	39	36	35	40	37	27	42	53	38	-	37	7	52	17	52	48	47	52	7	51	22	46
I use my mobile phone data for internet	36	55	72	16	21	15	58	36	31	39	39	35	30	17	67	63	75	17	59	-	38	-	-	84	49	45	19
Installation costs too high	25	43	23	17	-	22	34	24	15	31	15	28	18	30	-	34	56	31	9	-	24	-	-	58	-	12	38
The monthly cost of access is too high (i.e. monthly broadband bill)	18	19	30	15	-	22	12	26	21	17	20	18	13	31	8	34	11	37	8	-	-	-	48	-	17	-	43
I don't know how to use the internet	12	-	16	16	28	20	11	2	12	12	16	10	13	19	-	-	-	20	4	48	16	-	-	-	-	-	14
There is no broadband internet available in my area	4	4	4	4	-	3	10	-	4	4	12	1	3	2	10	-	7	-	4	-	19	-	-	7	-	-	-
I can access internet elsewhere	3	8	-	2	13	3	-	3	2	3	4	3	5	3	-	-	-	3	-	-	8	-	-	9	-	-	3
I have privacy/security concerns (i.e. data protection, etc.)	3	-	-	6	-	-	11	-	3	3	-	4	2	7	-	-	-	6	-	-	8	-	-	-	-	-	7
I don't have a computer/connected device (e.g. Smart TV, tablet, etc.)	1	-	-	1	-	-	-	2	-	1	-	1	-	2	-	-	-	-	-	-	-	-	-	-	17	-	-
Other (please specify)	8	8	8	9	8	11	6	9	9	8	8	9	6	8	15	-	19	1	20	-	6	53	-	-	-	21	2
NET (Cost)	33	43	30	30	-	33	42	32	24	39	25	36	28	36	8	34	68	45	18	-	24	-	48	58	17	12	52
NET (Not Prioritised)	72	69	72	74	91	51	89	71	73	72	68	74	80	59	67	100	75	67	75	52	81	47	52	93	100	67	62
NET (Barriers)	15	4	20	19	28	23	19	4	15	16	25	12	14	24	10	-	7	20	9	48	30	-	-	7	17	-	14

Q.2 Why do you not have a broadband connection installed at your home?

Base: Those without broadband at home n – 87

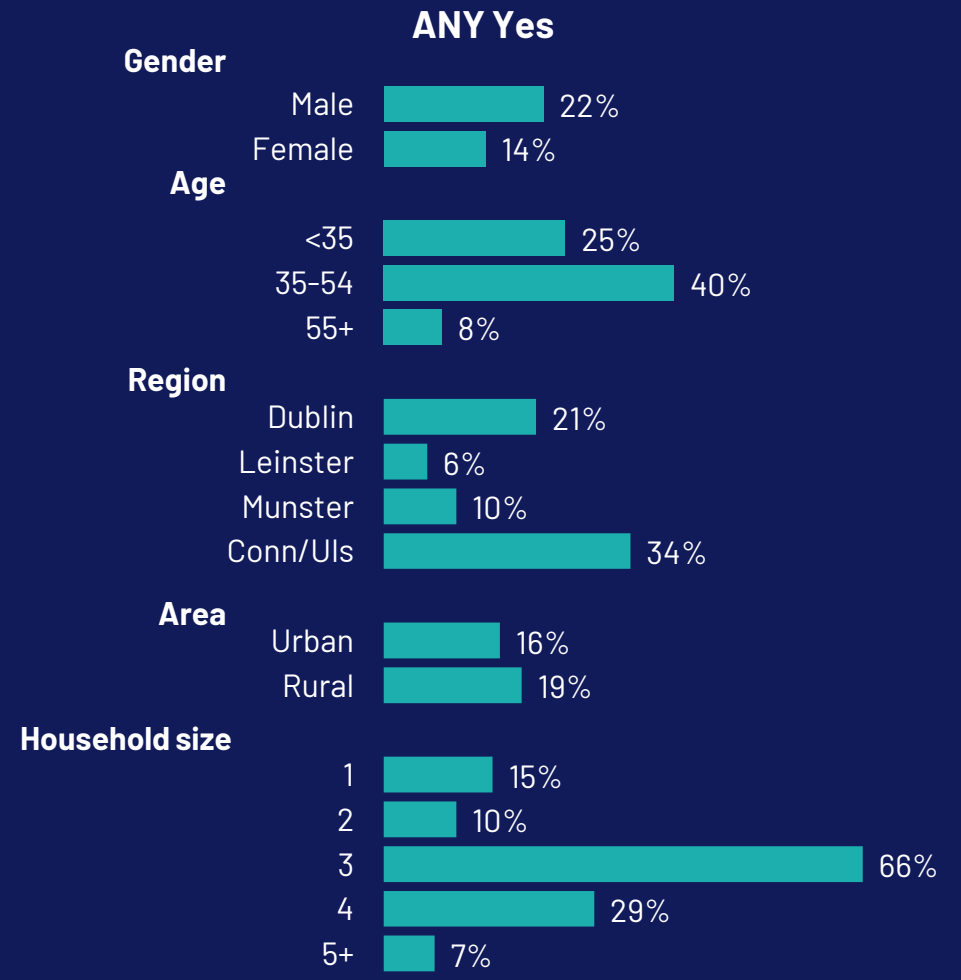
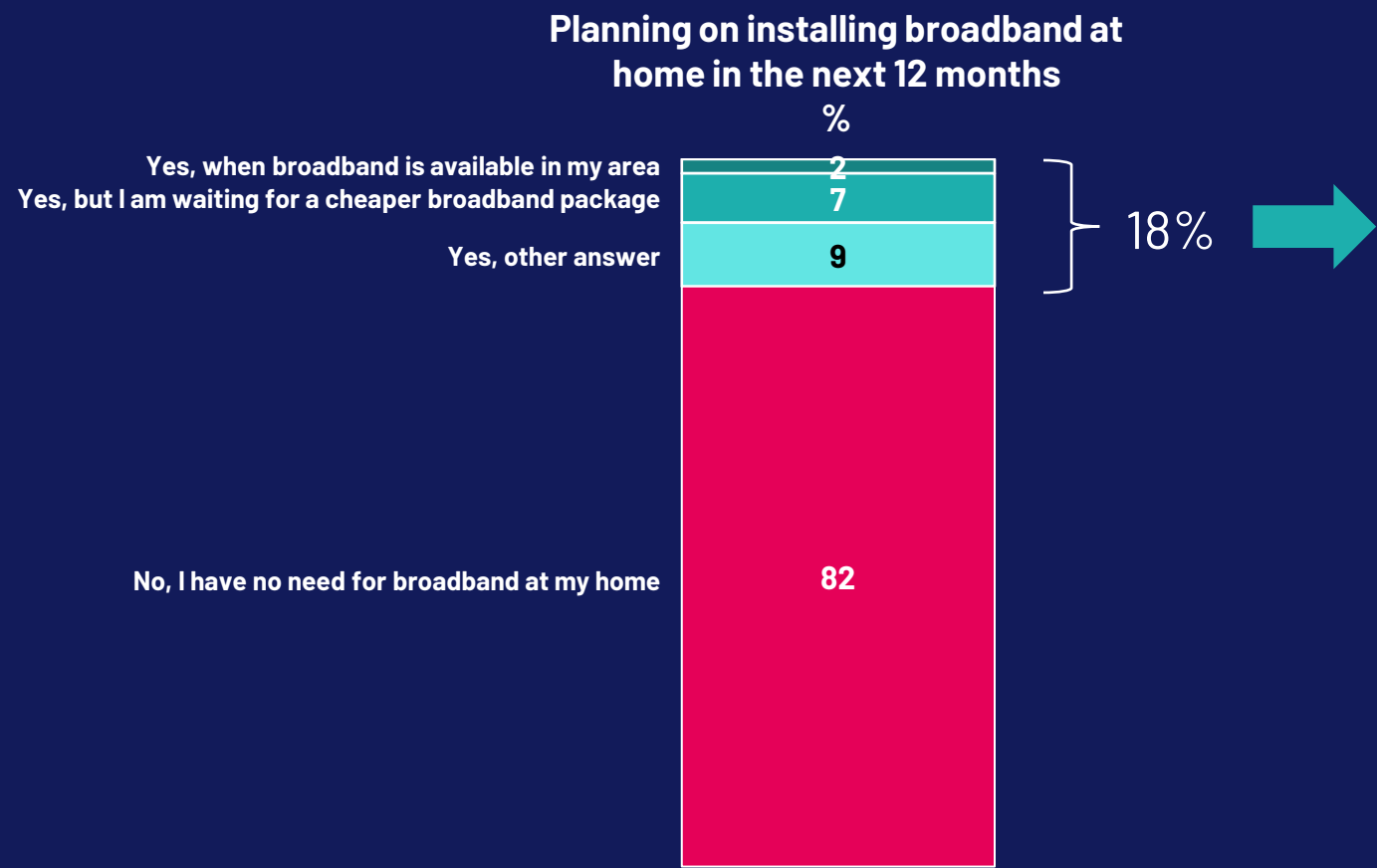
Significantly higher than total

Significantly lower than total



Installing broadband is not being prioritised by those without broadband currently

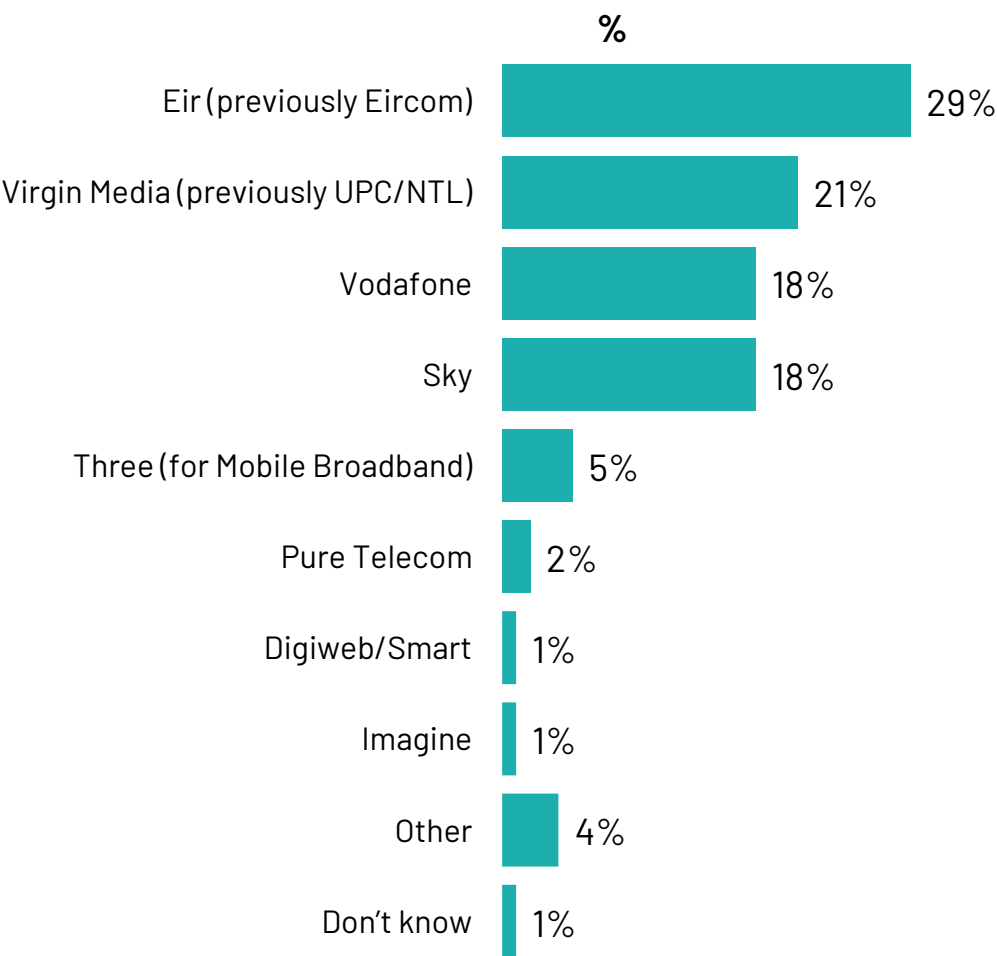
4 in 5 consumers without broadband are not planning to install in the next 12 months, regardless of cheaper or improved availability / service. Among the 1 in 5 that plan on installing, there are clear difference across demographics, with the most significant differences being region and household composition.



Fibre is the leading broadband type, with more varied broadband providers mentioned

2 in 3 cite having fibre, while there is much more spread regarding broadband provider, with Eir, Virgin, Vodafone, and Sky all holding their own.

Which supplier provides your home broadband service?



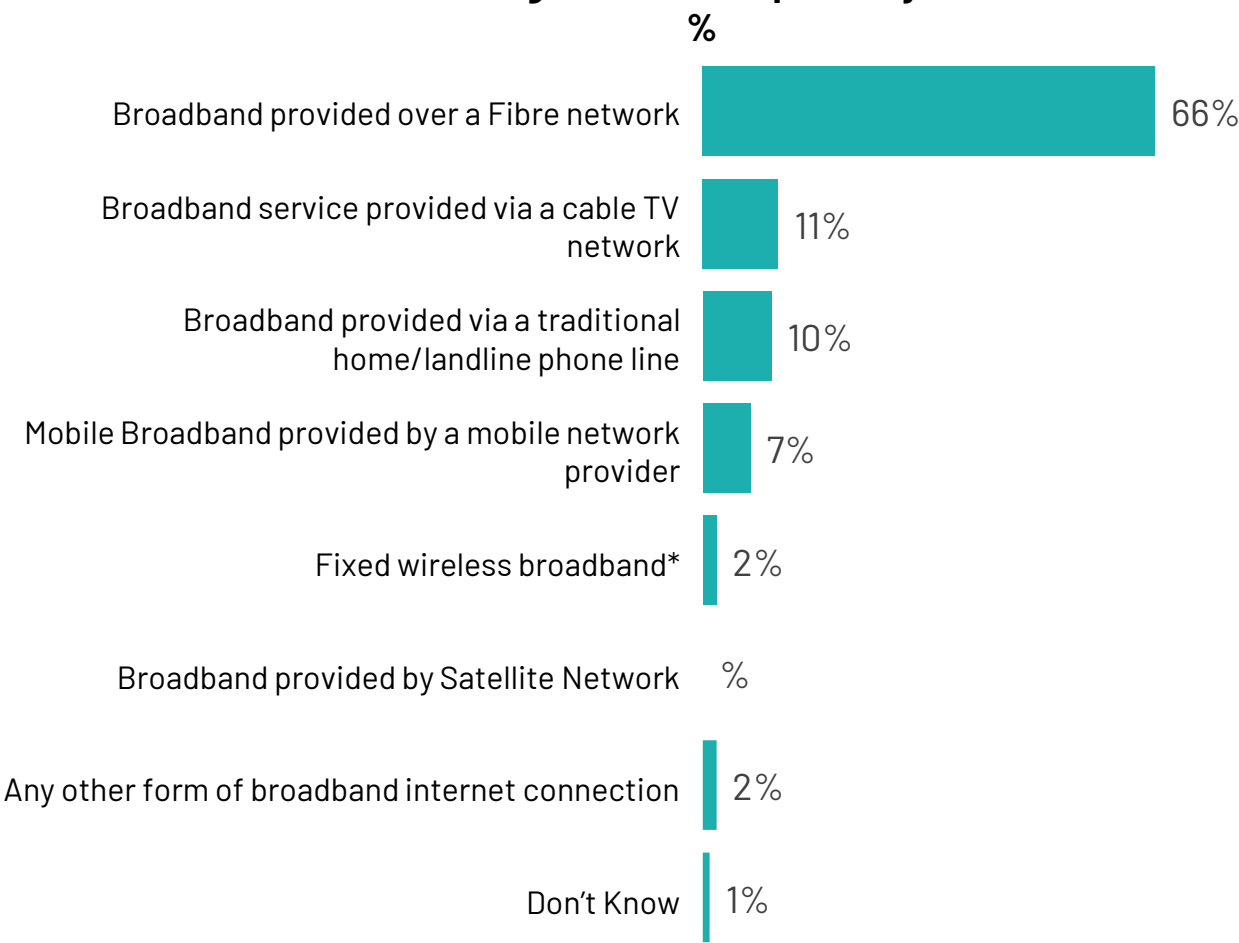
Q.6 Which supplier provides your home broadband service?

Q.4 In your home, which of the following means of accessing broadband is primarily used?

Base: Those with broadband at home n – 919

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Which of the following means of accessing broadband is primarily used?

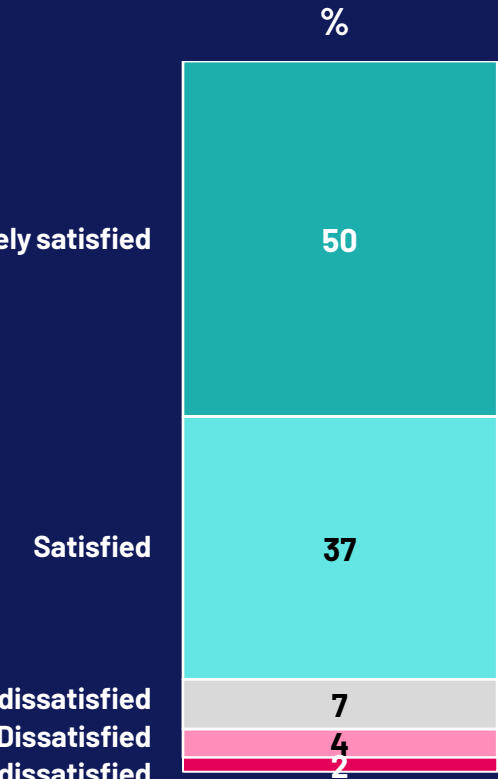


*Where wireless radio signals are delivered from nearby telecommunications masts/towers, sometimes through an antenna attached to the outside of your home

Satisfaction is strong for most broadband users

Almost 9 in 10 note they are satisfied, with steady levels of satisfaction across region, area, household size, provider, and broadband types, illustrating growing quality service in broadband on a more general scale in Ireland.

Satisfaction with broadband connection

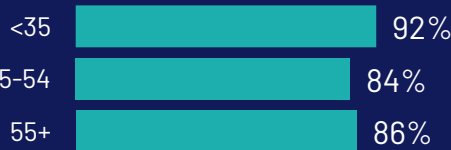


87%



ANY Satisfied

Age



Area



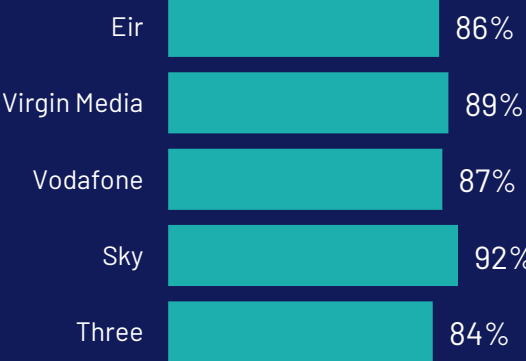
Region



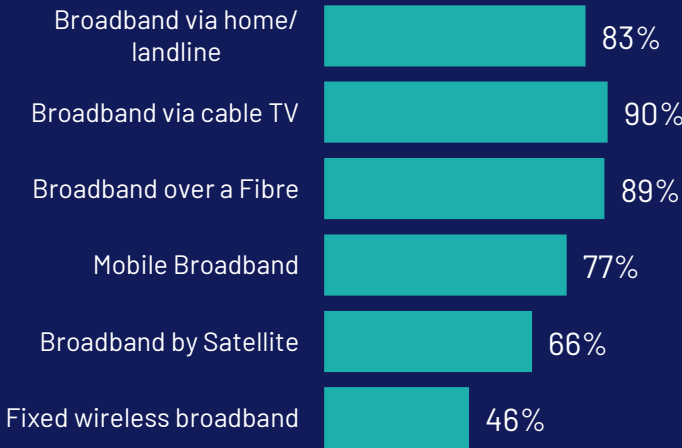
Household size



Broadband Provider



Broadband Connection

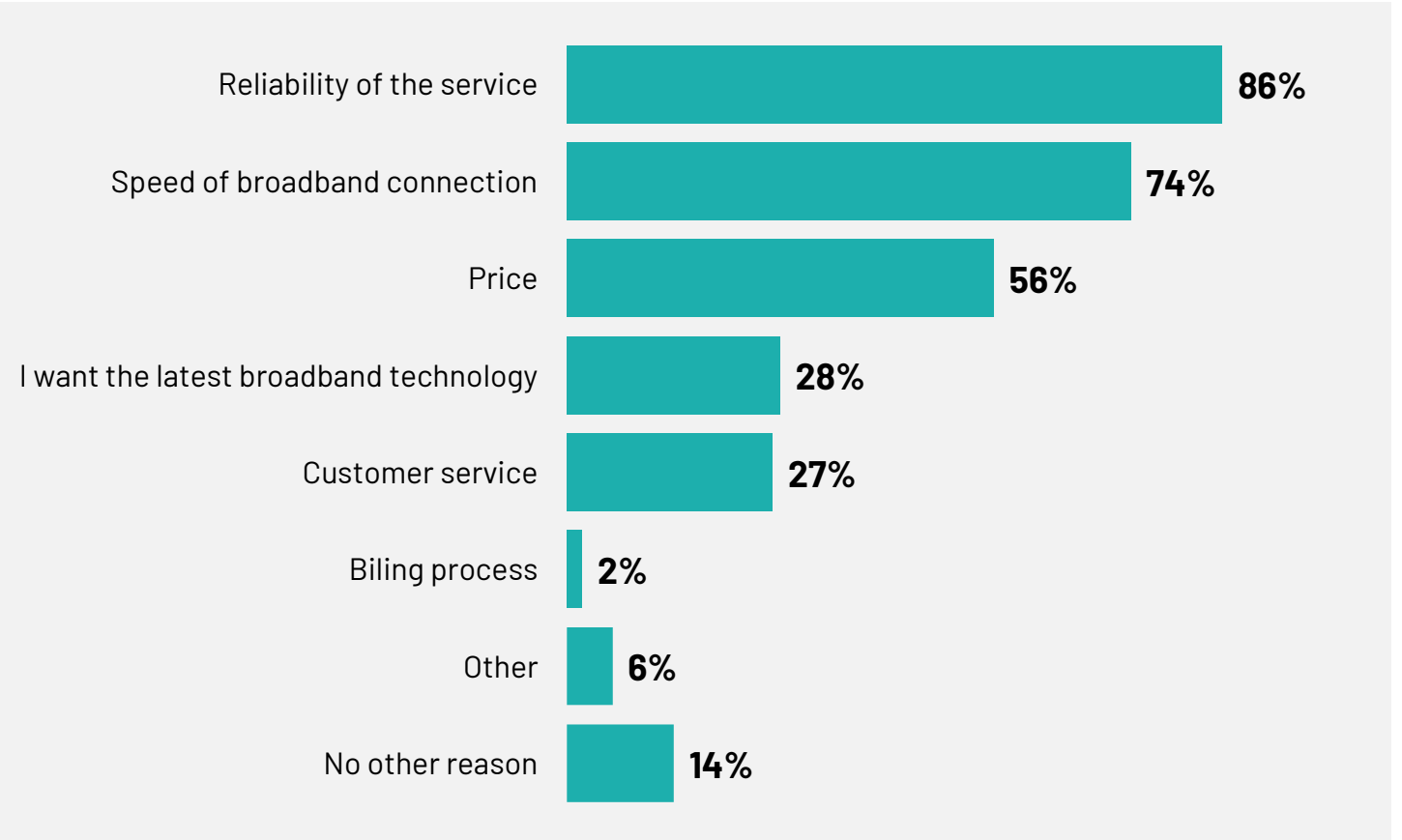


Q.5 Using the following scale, how satisfied, or dissatisfied, are you with the quality and reliability of the broadband connection at your home?

Base: Those with broadband at home n = 919

51% of those unhappy with their current broadband intend to switch in the next 3 years

What are their reasons for intending to switch?



Half of consumers that are unhappy with their current service are considering switching in the next three years, with reliability and speed being the key reasons for considering a move. Price also plays a factor with over half citing this.

Q.7a Do you intend to switch/upgrade your broadband provider or plan in the next 3 years?

Q.7b Which of the following are the reasons for switching / upgrading?

Base: Those dissatisfied or unsure of their connection n - 123; Those planning on switching/upgrading provider n - 69

KEY INSIGHTS



Summary

1 Devices

TV and audio-visual content is being watched on multiple devices, with an average of 2 devices per household.

However, TV sets are the primary device for most, particularly Smart TVs (71%). Primary device remains TV sets, predominately SMART TVs (71%), but also Traditional televisions (18%).

Smartphone, tablets, and laptops are significant secondary devices, with particularly high usage among younger cohorts.

2 Multiple TV Platforms/Services & Satisfaction with all TV Services

Multiple TV platforms/services in use on primary (1.83) and secondary (1.77) devices. There is significant crossover in terms of services across both primary and secondary devices.

OTT (Paid and Free)(49%), IP-TV (35%), and Sky Satellite (27%) are the most popular platforms for TV/AVS services. DTT/Saorview services also highly used (23%), with half of these using DTT as their primary service.

Near universal satisfaction with TV Services across all platforms

3 DTT / Saorview

13% of TV households primarily use DTT/Saorview on its primary TV/Smart TV device ("Primary DTT")

Half of these would migrate from DTT/Saorview to an internet-based TV service depending on circumstances.

7% of households rely on Irish DTT ("DTT Only"), not having any other form of reception on their primary TV.

Some DTT only households would need to take action to do so - 43% have No Broadband, and 29% have broadband but no smart TV.

Primary DTT and DTT Only households are more likely to be older (>55) smaller households(1), rural (Ulster/Connaught), with lower levels of broadband.

Summary

4 Saorview DTT/Saorview Service – Customer views

Among primary DTT households DTT/Saorview is valued by many as cost-free TV and/or covering the needs of the household, with few citing the lack of available or fast broadband as the reason for use.

Among primary DTT households, the majority (84%) do not plan to move away from DTT in the near future; however, when prompted further, half of primary DTT users would consider migrating depending on changes in market alternative (e.g. price, broadband availability)

In last 3 years 3% of users switched from primarily watching DTT to a paid TV service (a 20% reduction in usage). Migration appears driven by broadband availability and speed (40%), as well as content variety and the ability to use multiple devices, which IP-TV and paid OTT offers.

High levels of FTA viewership across TV platforms, with a good understanding (>65-70%) of online access among these viewers. However much lower understanding of online access with households that use DTT to primarily view FTA channels.

5 Broadband usage

There is near universal broadband usage (91%) in homes, with DTT only homes more likely not to have broadband. Strong satisfaction is noted among most broadband users.

Installing broadband is not being prioritised by those without broadband currently, regardless of cheaper or improved availability / service.

THANK YOU



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