



Context

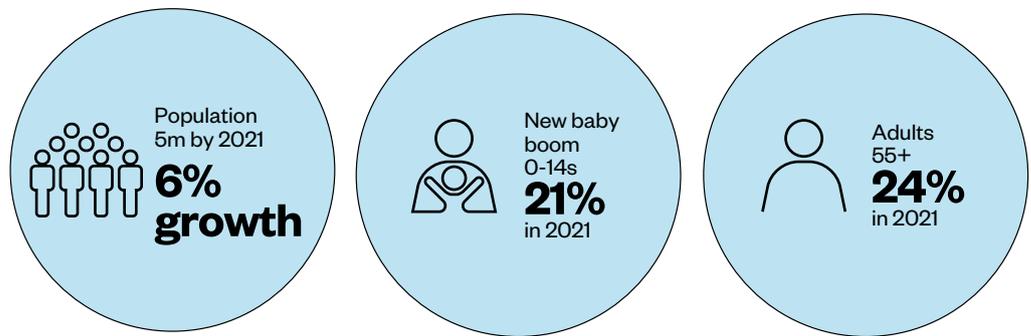
In defining its strategy for 2018-2022, RTÉ must consider the interests of people in Ireland. It must also take stock of the dynamics of the media industry and RTÉ's position as it comes to the end of its first five-year strategy for 2013-2017.

Media landscape

Earlier this year, RTÉ produced its report, Media Landscape in Ireland. It contained a detailed analysis of the external challenges RTÉ faces, including trends in audiences, technology and competition. The key findings are summarised below.

Audience fragmentation

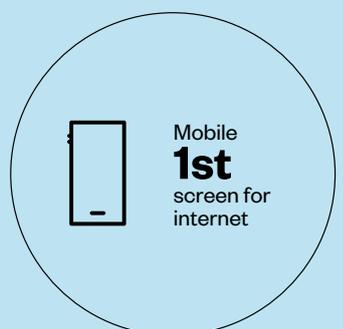
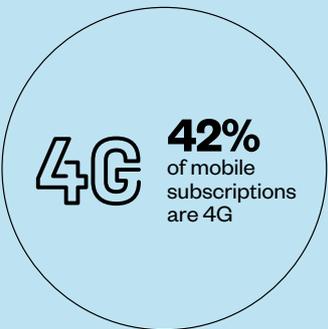
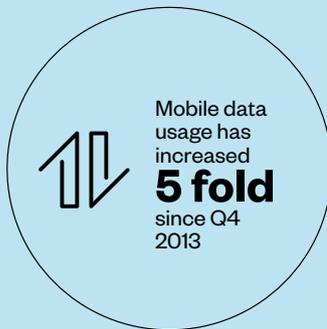
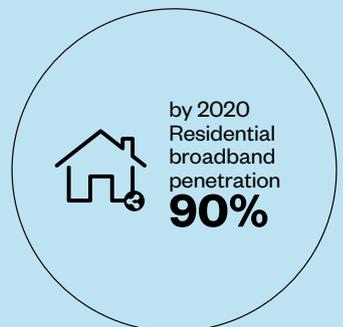
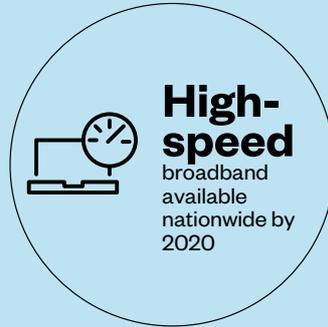
Ireland's population is both growing and ageing and becoming more diverse¹.



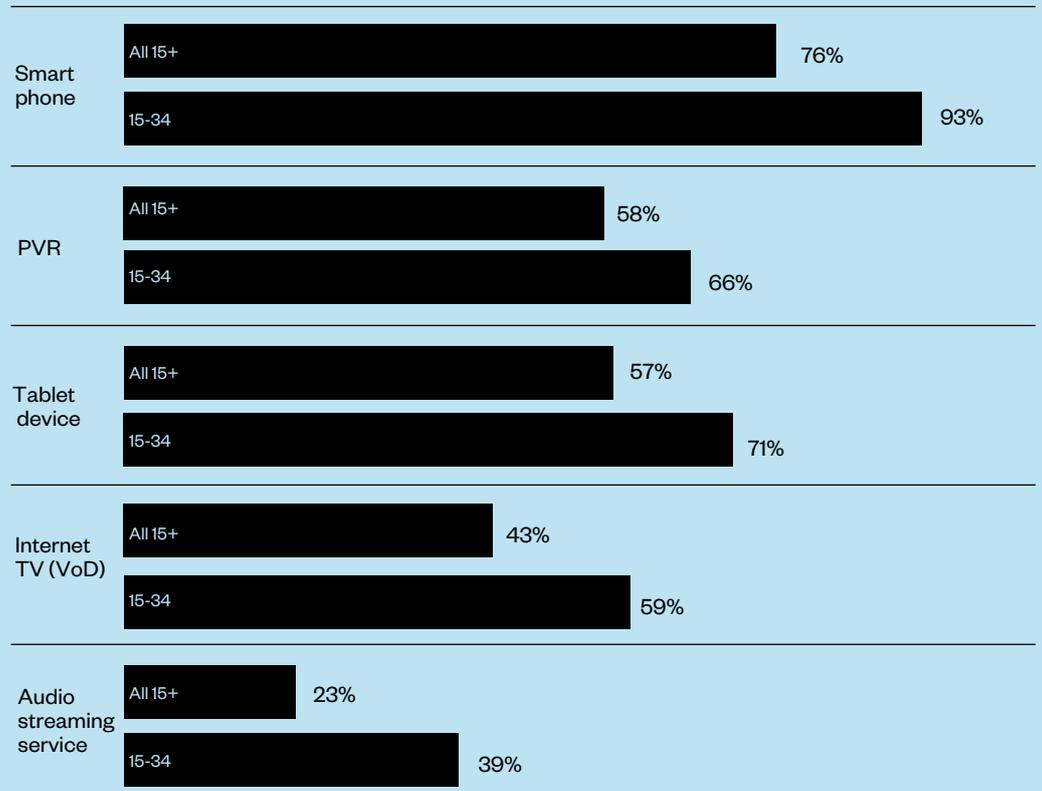
¹ Source: Central Statistics Office www.cso.ie

Technology trends

Better infrastructure, broadband speeds and lower data rates give people more options to consume content, driving an increase in online media consumption.



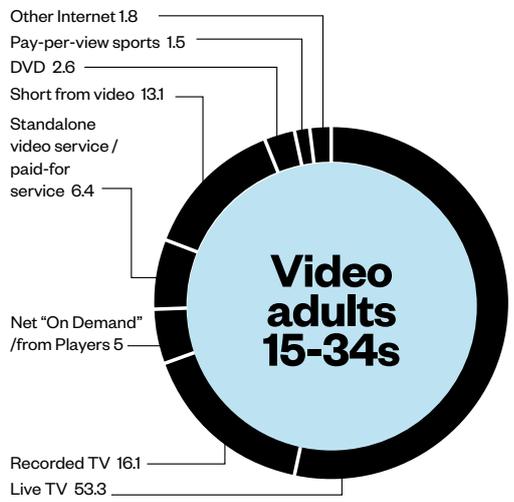
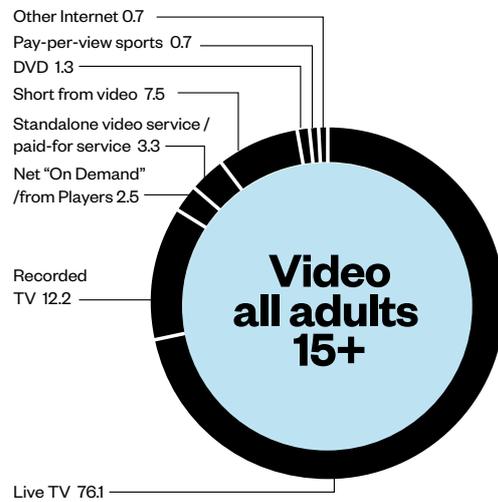
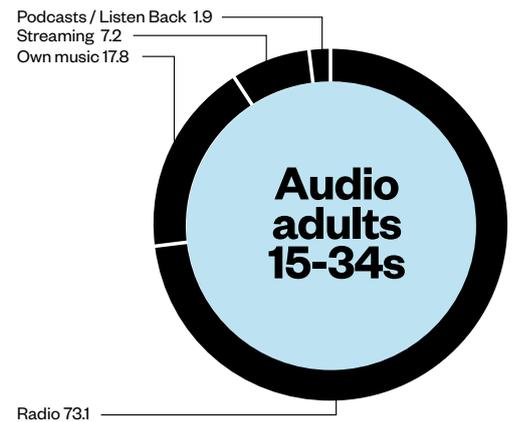
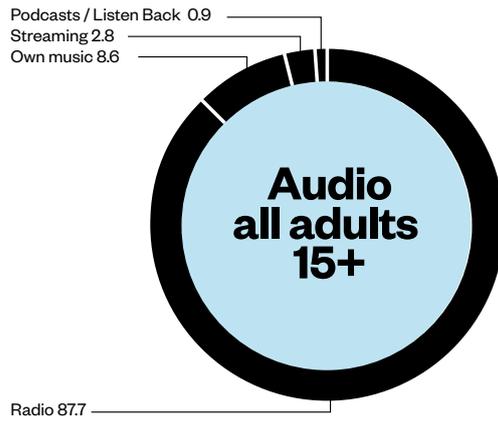
Device Ownership



Source: JNLR/Ipsos MRBI, 2016

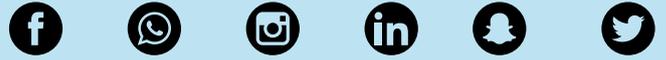
Media landscape

People choose to watch, listen and read in ways that are most convenient to them.



Source: TAM Ireland, Total Viewing Habits Study, 2016

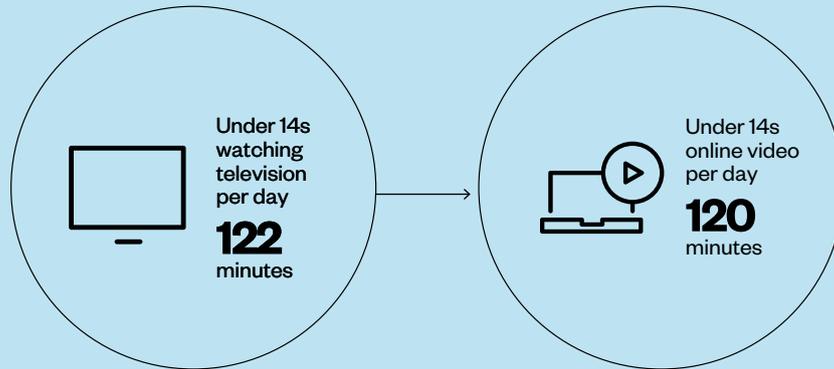
Social media is now the most used source for news among adults in the 18-34 age group².



	Facebook	WhatsApp	Instagram	LinkedIn	Snapchat	Twitter
Social Media Account Ownership % social networking owners in Ireland - Jan 2017	64%	56%	28%	29%	29%	29%
Daily Usage % of those who have an account with the listed platforms	74%	63%	56%	18%	70%	33%

Source: Ipsos MRBI Social Networking Tracker, Jan 2017 and Ipsos MRBI Social Messaging Tracker, Jan 2017

Younger audiences are quicker to adopt new services and new ways of consuming content.

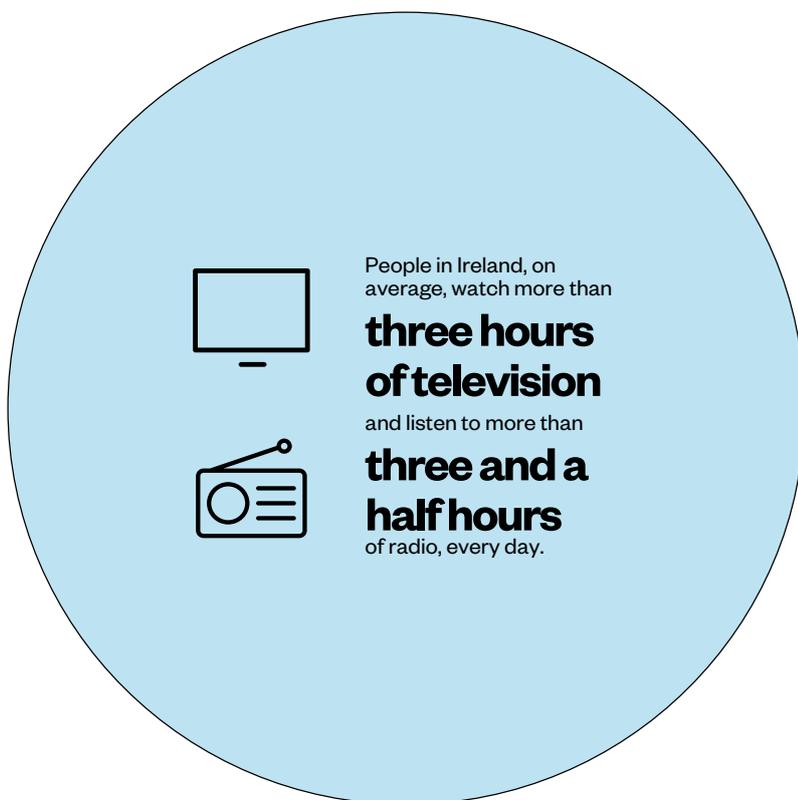


Source: TAM Ireland/ Nielsen TAM, Consolidated data, Nat, Children 4-14, 2016

² Source: Reuters Institute Digital News Report 2016 (Ireland), News platforms by age group, p. 29

Media landscape

However, the habits and rhythms of people's daily lives do not change as quickly or as radically as we may think.

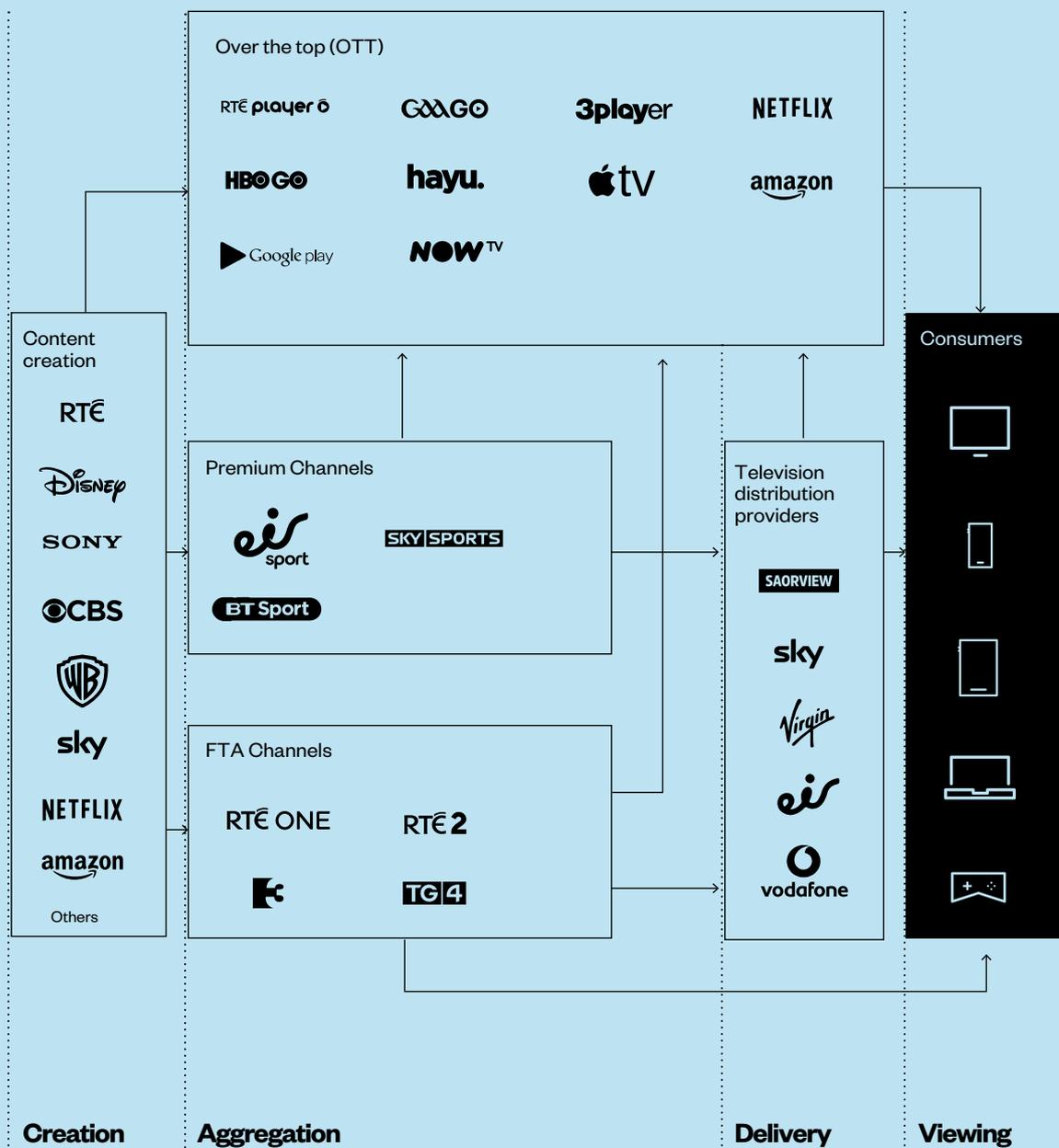


Source: TAM Ireland/Nielsen TAM, 2016 and JNLR/Ipsos MRBI 2016/4

Competition

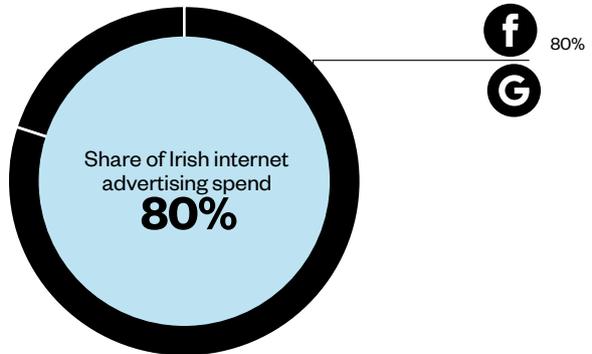
Television is no longer an autonomous industry. It has become a battleground for technology, telecommunications and platform companies, with more global ownership of Irish media and distribution than ever before.

New platforms – such as Google, Amazon and Facebook – are increasingly influencing content discovery, news and entertainment, particularly among younger audiences.

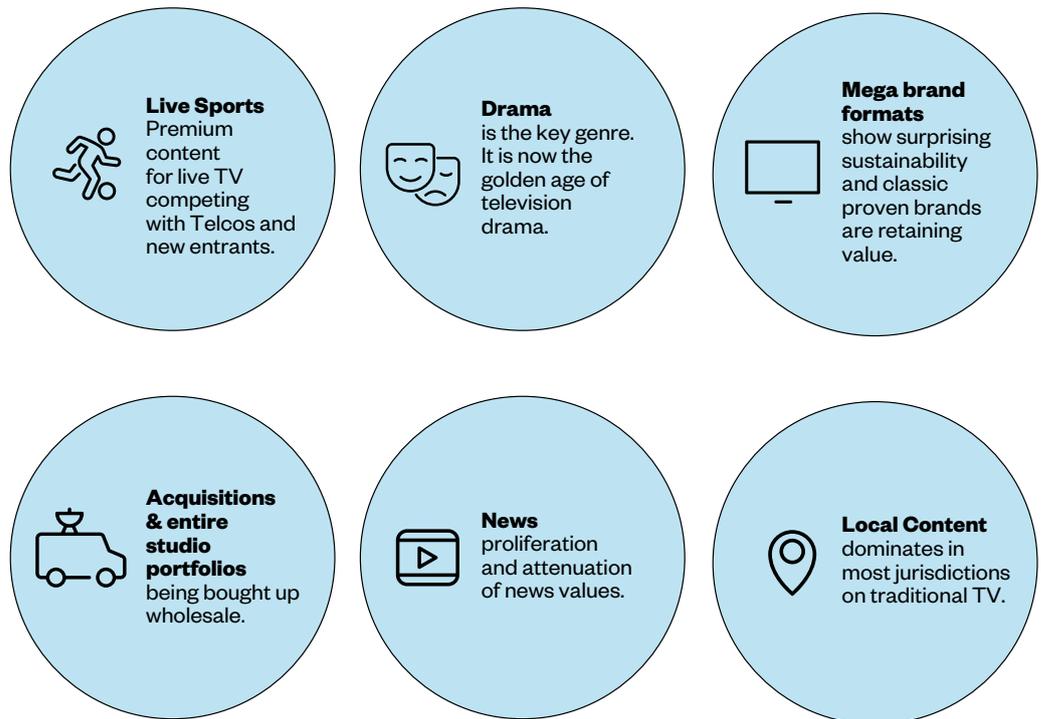


Media landscape

Many of their users are foregoing their privacy for access to free content. Brands are flocking to these platforms to connect with so-called 'millennials'.



Content sits at the centre of the entire media value chain and increased competition and global dynamics are driving hyper-inflation in rights costs.



Looking ahead

The Irish media environment has never been more competitive. RTÉ is now operating in an environment where new transnational and global competitors are investing significantly in content and technology to gain market share. They are not subject to the same accountability as the regulated media industry and do not have the same focus on distinctive high-quality Irish content or command the same levels of trust as PSM.

The future is not about the demise of linear media in favour of an on-demand world. It is far more complex. RTÉ, like many media organisations across the world, must adapt to survive and thrive in an environment that will remain in flux for some years to come.