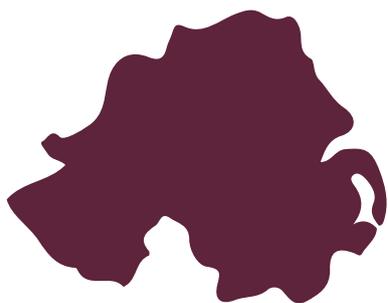


# MEDIA NATIONS: Northern Ireland 2018



Published 18 July 2018





# About this document

This is Ofcom's first annual Media Nations: Northern Ireland report. The report reviews key trends in the television and audio-visual sector as well as the radio and audio industry in Northern Ireland. It provides context to the work Ofcom undertakes in furthering the interests of consumers and citizens in the markets we regulate.

In addition to this Northern Ireland report, there are separate reports for the UK as a whole, Scotland, and Wales, as well as an [interactive data report](#).

The report provides updates on several datasets, including bespoke data collected directly from licensed television and radio broadcasters (for output, spend and revenue), Ofcom's proprietary consumer research (for audience opinions), and BARB and RAJAR (for audience consumption). It should be noted that our regulatory powers do not permit us to collect data directly from online video-on-demand and video-sharing services (such as ITV Player, Netflix, Amazon Prime Video and YouTube) for research purposes, and therefore we rely predominately on third-party sources for information relating to these services.

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# Key points

## In 2017 people in Northern Ireland spent an average of 3 hours 18 minutes per day watching broadcast television, down 17 minutes since 2016

- For the first time, the amount of viewing in Northern Ireland has dipped below the UK average.
- Average daily viewing in Northern Ireland declined by 7.9% between 2016 and 2017 – the largest decline of all the UK nations.
- Although people in Northern Ireland are watching less broadcast television, they are using their TV set more for watching other things. Viewing of non-broadcast services on the TV set (such as subscription video on demand, or gaming) increased by six minutes a day in 2017, to 37 minutes per person per day.
- The opening episode of *I'm a Celebrity...Get Me Out of Here* was the most-watched broadcast programme on the TV set in Northern Ireland in 2017, with an audience of 409,000 and a share of over 53% of those watching TV at that time.

## Spend by the BBC on programming for Northern Ireland fell by 14% in 2017

- In 2017, the BBC and UTV spent a combined £28.6m on first-run UK-originated content for viewers in Northern Ireland, an 11% decrease year on year in real terms. This decrease was driven by the BBC, which reduced its spend by 14%, while UTV spend declined by just 1%.

## Digital terrestrial television is the most popular TV platform in Northern Ireland

- Forty-seven per cent of homes had only a digital terrestrial (DTT) service at the beginning of 2018.
- At 39.3%, the proportion of homes in Northern Ireland with a satellite service was greater than the UK's 37.1% in Q1 2018.
- Virgin Media's cable service was available to 35% of premises across Northern Ireland in January 2018. This is an eight percentage point (pp) increase in availability since June 2016 (26.7%) and the largest increase of all the UK nations over this period. Nearly one in ten homes (8.7%) had a cable TV service in Northern Ireland by the start of 2018 – lower than the 14.9% UK average.

- Just over half of adults in Northern Ireland (55%) claimed to use an on-demand/streaming service in 2018, in line with Scotland (50%) and Wales (54%). Among such services, Netflix was the most popular, with 29% of adults claiming to use it, followed by BBC iPlayer (22%) and YouTube (14%).

## Nearly 70% of PSB viewers were satisfied with PSB provision in 2017

- At 69%, this compares with 75% for the UK average, 75% in England, 72% in Wales and 71% in Scotland.
- People in Northern Ireland rated delivery of *'its news programmes are trustworthy'* highly (74%). This compares with 69% for the UK average, 68% in England, 65% in Wales and 79% in Scotland.
- Less than half of regular/occasional viewers in Northern Ireland (48%) rated the statement *'It portrays Northern Ireland fairly to the rest of the UK'* highly. This compares with 47% in Wales and 56% in England, and is significantly<sup>1</sup> lower than in Scotland (62%).
- *'It shows different parts of the UK, including England, Northern Ireland, Scotland and Wales'* was rated highly for delivery by 63% of regular/occasional viewers in Northern Ireland. This compares with 56% in Wales, 66% in England and 70% in Scotland.

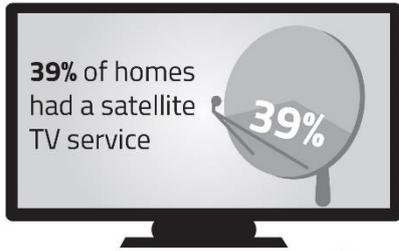
## Digital radio listening is growing, but at 35% of all listening, it is much lower than in the UK as a whole

- There was an 5pp year-on-year increase in the share of radio listening to digital radio (either online, through digital television or through a DAB set) in Northern Ireland, reaching 35% of all listening hours by the start of 2018.
- Despite this, digital radio listening in Northern Ireland, as a share of all radio listening, remained far lower than the UK average (51%), Scotland (47%) and Wales (47%) at the start of 2017.
- Half of all adults in Northern Ireland (50%) owned a DAB radio in Q1 2018, up from 23% in 2013. But this remains significantly lower than the UK average (64%) and both Scotland (66%) and Wales (56%).
- Looking at all radio, more than 90% of adults (93.4%) listened to the radio every week in Q1 2018 – the greatest proportion across the UK nations. However, at an average of 19 hours 18 minutes a week, they tune in for less time than listeners in the other nations.
- BBC Radio Ulster was the most popular radio station in Northern Ireland in Q1 2018.

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<sup>1</sup> Throughout the *Satisfaction with and perceptions of TV* chapter of this report, 'significantly' has only been used to highlight any increase or decrease in scores that show statistically significant differences at the 95% confidence level for results compared within the current year and at the 99% confidence level for results compared between years. For further details, please refer to the PSB tracker technical report on Ofcom's website <https://www.ofcom.org.uk/research-and-data/data/statistics/stats18>

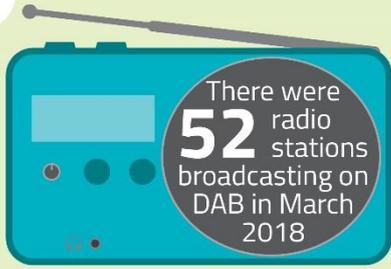
# Key findings: Northern Ireland



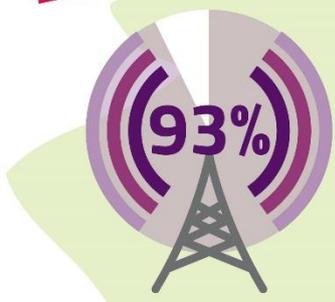
**29%** of adults use Netflix, the most popular on-demand/streaming service in Northern Ireland



**£** BBC and UTV spent **£29m** on original content for Northern Ireland in 2017, an 11% decrease year on year in real terms



On average people spent **3 hours 18 minutes** per day watching TV in 2017



93% of adults listen to the radio every week

*I'm a Celebrity Get Me out of Here!* was the most-viewed TV programme in 2017

Notable 2017 PSB productions include *Wanted Down Under*, *Line of Duty* and *The World's Most Expensive Cars*



of regular or occasional PSB viewers claimed to be satisfied with PSB broadcasting in 2017



Ownership of DAB radio sets has increased year on year from 38% to **50%**

All data relates to 2018 in Northern Ireland unless stated otherwise



# TV services and devices

## Chapter overview

TV services are available in a variety of ways in Northern Ireland. Freeview is available through digital terrestrial television (DTT) while Sky and Freesat offer satellite services and Virgin Media offers a cable TV service. Set-top boxes from providers including TalkTalk and BT offer a Freeview service, alongside pay-TV channels delivered through an internet connection (sometimes referred to as internet protocol television or IPTV).

There are also a growing number of on-demand and streaming services available to consumers online. These range from PSB services like BBC iPlayer, ITV Hub, All4 and My5 to the subscription services offered by Netflix and Amazon.

## 97.2% of premises in Northern Ireland had DTT coverage in 2017<sup>2</sup>

DTT services, which are delivered through a television aerial, are provided in Northern Ireland through a combination of public service broadcasting (PSB) and commercial (COM) multiplexes.<sup>3</sup> Examples of services on the PSB multiplexes include BBC One, UTV, Channel 4 and Channel 5 while the COM multiplexes provide access to services such as Dave, Sky News and E4.

The PSB multiplexes are carried on Northern Ireland's three main television transmitters (Divis, Limavady, and Brougher Mountain) and over 40 relay transmitters. As of January 2018, 2.8% of premises in Northern Ireland had no DTT coverage at all, while nearly a quarter (24.2%) could

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<sup>2</sup> Ofcom analysis of operator data, January 2018

<sup>3</sup> Multiplexes are the transmission infrastructure used to distribute television services.

receive the PSB channels but not the channels delivered via the COM multiplex through their aerial. These channels are carried only on the main three transmitters.<sup>4</sup>

Ninety-seven per cent of homes had a television in the first quarter of 2018, higher than the UK as a whole (95.6%). DTT is the most popular TV platform in Northern Ireland, with 47% of households having only a Freeview service at the beginning of 2018.<sup>5</sup>

### Republic of Ireland TV channels

Republic of Ireland TV services are available in most parts of Northern Ireland on several platforms.

RTÉ One and Two, and Irish language channel TG4, are available through a rooftop aerial to more than 90% of households via digital terrestrial television, either via Freeview or Saorview (the Republic of Ireland's free-to-air DTT service).

Which platform viewers use to access these services depends on where they live.

On Freeview, these channels are broadcast from three transmitters (Black Mountain, Carnmoney Hill, and Brougher Mountain) and are available to about three-quarters of the population, using the same aerial viewers used to receive UK TV channels. Viewers also need a compatible TV or set-top box.

Saorview is received from transmitters in the Republic of Ireland and covers just over half of the population of Northern Ireland. Viewers in Saorview reception areas can also receive other Republic of Ireland TV channels - RTÉjr, TV3, 3e, be3 and RTÉ radio services.

Viewers in Northern Ireland wishing to access these services need a separate TV aerial and compatible TV or set-top box.

There is also 100% availability of RTÉ One / Two, and TG4 on Sky and Virgin Media. In addition, these channels are available via BT TV in areas where these channels are available on Saorview or Freeview.

In cases where RTÉ does not have the rights to broadcast certain programmes in the UK, for example some sports events, these programmes may be blocked when viewed via Freeview, Sky or Virgin Media.

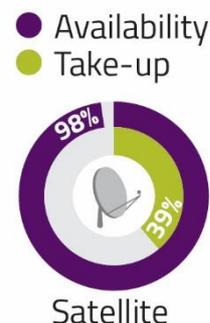
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<sup>4</sup> Ofcom analysis of operator data, January 2018

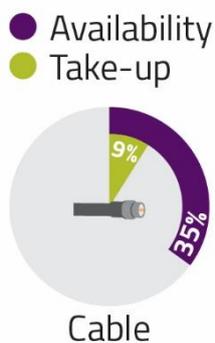
<sup>5</sup> Source: BARB Establishment Survey Q1 2018

## Nearly 40% of homes in Northern Ireland had a satellite service in Q1 2018

Satellite TV services are provided by Sky and Freesat and are available to about 98% of UK premises<sup>6</sup>, with broadly the same level of availability across Northern Ireland. Sky's paid satellite service was the most popular pay-TV service in Northern Ireland in Q1 2018, at 33.7% of homes. An additional 5.6% had a free satellite service, probably from Freesat. At 39.3%, the proportion of homes in Northern Ireland with a satellite service was greater than the UK's 37.1% at the beginning of 2018.<sup>7</sup>



## Cable availability has grown faster in Northern Ireland than in other UK nations since 2016



Virgin Media's cable service was available to 35% of premises across Northern Ireland in January 2018. This is an 8pp increase in availability since June 2016 (26.7%) and the largest increase of all the UK nations over this period.<sup>8</sup> This growth is the result of Virgin Media's network expansion through [Project Lightning](#), with new areas including Bangor, Ballykelly, Limavady, Newtownards and Strabane now having access to Virgin Media's service.

Nearly one in ten homes (8.7%) had a cable TV service in Northern Ireland at the beginning of 2018 – lower than the 14.9% average for all the UK.

<sup>6</sup> Based on the availability of a line-of-sight path to the satellite. Does not include the impact of factors such as access in multi-dwelling units where it is not feasible to install a dedicated household satellite dish and where there is no internal wired distribution system for satellite, or the need for planning permission in some locations

<sup>7</sup> Source: BARB Establishment Survey Q1 2018

<sup>8</sup> Ofcom analysis of operator data, January 2018

## Broadband in Northern Ireland

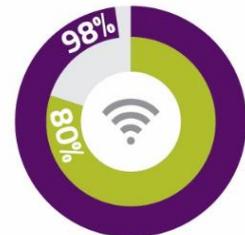
An internet connection with download speeds of at least 2Mbit/s is required to reliably deliver SD (standard definition) video, such as catch-up or live programmes on BBC iPlayer. In January 2018, 97.6% of premises in Northern Ireland had access to such a speed, a 2pp increase on June 2016. More than 96% (96.6%) of premises with DTT coverage that are unable to receive the channels delivered by the COM multiplex through their aerial have access to such a broadband service, therefore internet TV services are viable alternatives for such premises.<sup>9</sup>

Ofcom research shows that 80% of households in Northern Ireland had a fixed internet connection in H1 2018, comparable with the 80% across the UK as whole.<sup>10</sup> Superfast broadband offers download speeds of  $\geq 30$ Mbit/s and 48% of superfast lines in Northern Ireland delivered such speeds in 2017, a figure indicative of superfast take-up. This compares to 43% across the UK.<sup>11</sup>

## Broadband take-up provides further access to TV content

A growing number of providers are providing TV channels over the internet (IPTV services) in addition to DTT channels. These services are available from BT TV, TalkTalk TV, Plusnet TV, and via a standalone YouView box. Take-up has grown in Northern Ireland; in Q1 2018 7.9% of homes had such a service without also having cable, satellite or any other TV service. This was up from 1.7% in 2012.<sup>12</sup>

● Availability  
● Take-up



Internet

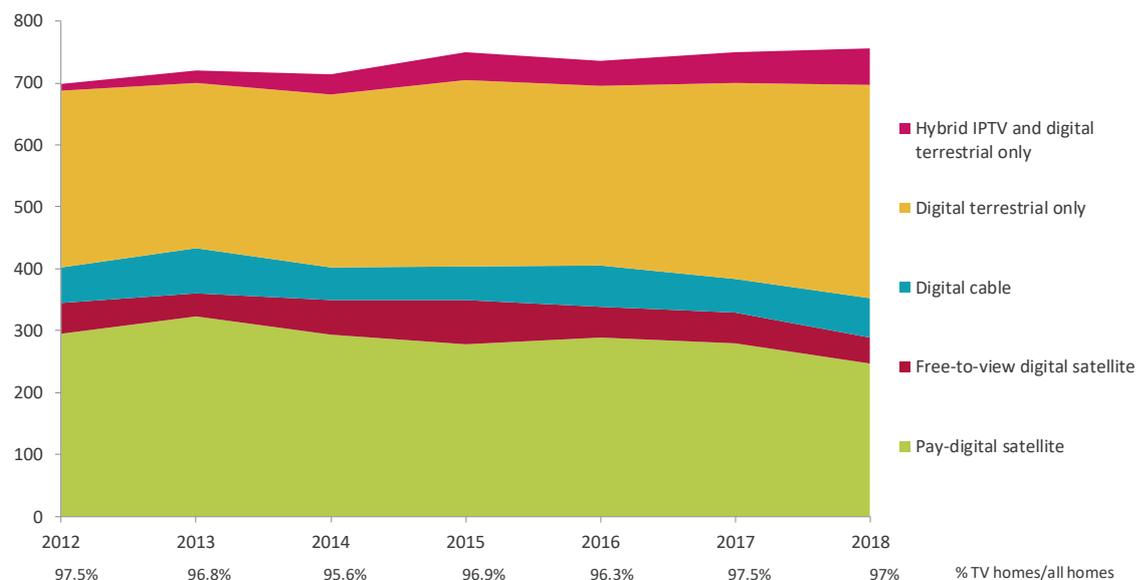
<sup>9</sup> Ofcom analysis of operator data, January 2018

<sup>10</sup> Ofcom Technology Tracker H1 2018

<sup>11</sup> *Connected Nations 2017: Northern Ireland*, available at [https://www.ofcom.org.uk/\\_data/assets/pdf\\_file/0021/108813/ni-connected-nations-2017.pdf](https://www.ofcom.org.uk/_data/assets/pdf_file/0021/108813/ni-connected-nations-2017.pdf)

<sup>12</sup> Source: BARB Establishment Survey Q1 2018 & Q4 2012

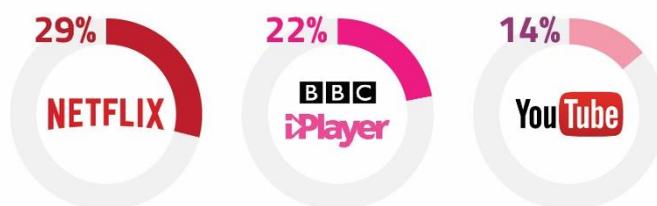
**Figure 1: TV platform take-up in Northern Ireland, households (000s): 2012-2017**



Source: BARB Establishment Survey. BBC areas. Household-level data. All TV sets in the home included, so there may be platform overlaps. Notes: Data points are based on Q4 of each year until 2018, when it is Q1. From Q4 2015 the claimed usage element has been removed, leading to an increase in the TV set homes population. Digital terrestrial only TV = receives digital TV through an aerial and not through DSAT/DCAB or other platforms. Hybrid IPTV digital terrestrial only = receives digital terrestrial TV through any of BT TV/TalkTalk TV/YouView/Plusnet TV and not DSAT/DCAB/other platforms.

## On-demand and streaming services offer additional content and options for consumers

Just over half of adults in Northern Ireland (55%) claimed to use an on-demand/streaming service in 2018, in line with Scotland (50%) and Wales (54%). Among these, Netflix was the most popular, with 29% of adults claiming to use it, followed by BBC iPlayer (22%). YouTube was the next most popular online service for watching TV programmes or films (14%).<sup>13</sup>



## Smart TVs were owned by 43% of TV households in Northern Ireland by 2018

More than two in five (43%) TV households in Northern Ireland had a smart TV in H1 2018, compared to 6% in 2013. Most of these (71%) were connected to the internet. But when we also

<sup>13</sup> Ofcom Technology Tracker H1 2018

take other devices into account, 43% of TV households in Northern Ireland had their TVs connected to the internet, lower than the proportion in England (52%), Scotland (53%) and Wales (52%).<sup>14</sup>

These other devices include games consoles (18% in 2018), set-top boxes with access to digital or cable broadcasts (such as Sky+, Virgin TiVo, YouView) (6%) and internet-connected dongles or set-top boxes (such as the NOW TV set-top box, Google Chromecast and Amazon Fire TV stick) (7%).<sup>15</sup>

Television programmes can also be accessed on other internet-enabled devices: 80% of people in Northern Ireland owned a smartphone in H1 2018, 62% a tablet and 49% a laptop.<sup>16</sup>

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<sup>14</sup> Ofcom Technology Tracker H1 2018

<sup>15</sup> Ofcom Technology Tracker H1 2018

<sup>16</sup> Ofcom Technology Tracker H1 2018



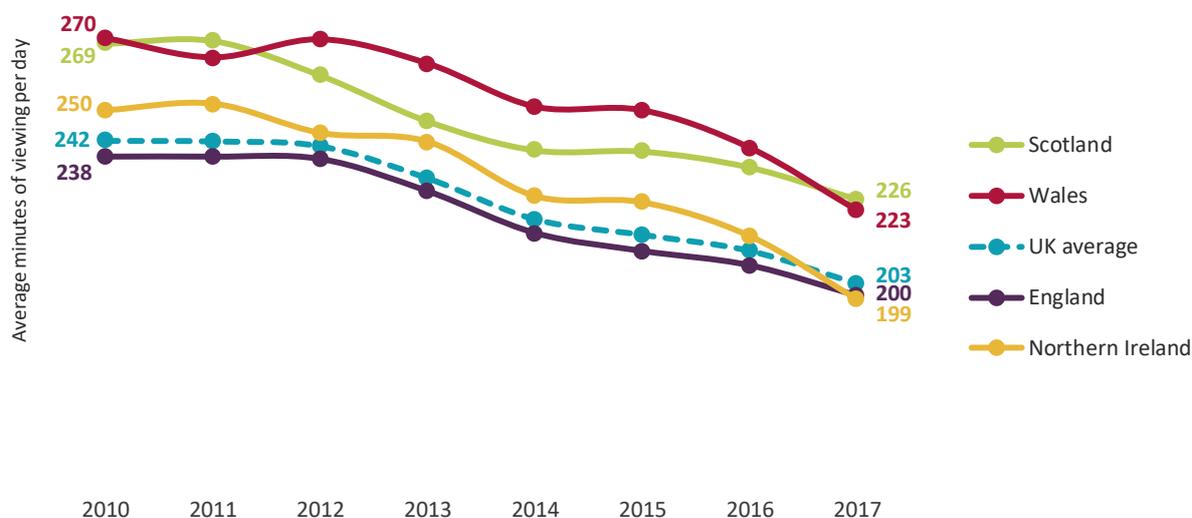
# TV and AV consumption

This section uses data provided by the Broadcasters' Audience Research Board (BARB), a panel of 5,100 homes across the UK providing the official broadcast TV measurement for the industry. This includes all viewing of broadcast TV through a television set, and via any device attached to the set such as a computer, laptop or tablet. Unless otherwise stated, figures quoted are for seven-day consolidated viewing. Consolidated viewing includes viewing of programmes at the time they were broadcast on TV (live viewing) as well as from recordings on digital video recorders (DVRs) and through catch-up player services (e.g. apps on smart TVs) up to seven days after the first broadcast (time-shifted). [See the methodology annex for more information.](#)

## **People in Northern Ireland watched less broadcast TV than in any other UK nation in 2017**

On average, people in Northern Ireland spent 3 hours 18 minutes per day watching television in 2017; their hours of viewing dipped below the UK average for the first time. This was a 17-minute (7.9%) year-on-year decline in viewing, compared to the UK average decline of 4.2%. Since 2010, the average amount of daily TV viewing has decreased by over 20%.

**Figure 2: Average total TV daily viewing by nation (in minutes): 2010-2017**

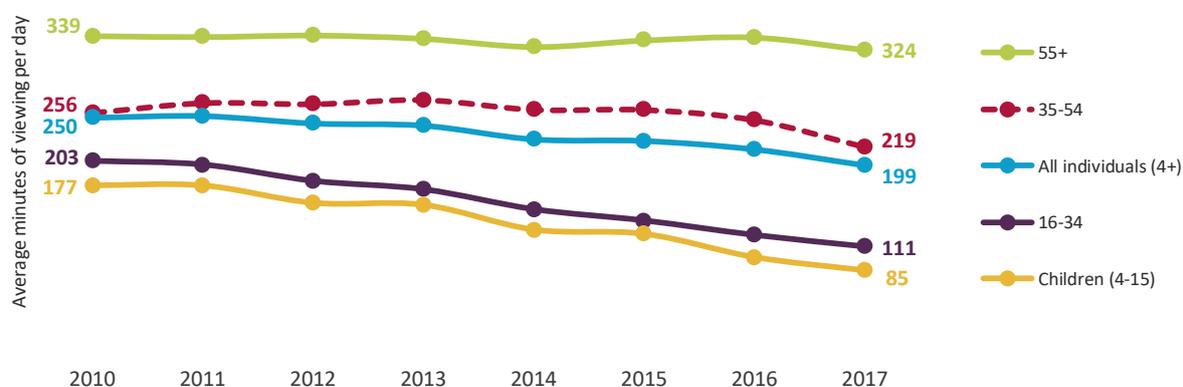


Source: BARB. BBC areas, all individuals (4+).

## Younger viewers are driving the decline of broadcast TV viewing

As in the rest of the UK, it is the decline in viewing by children and young adults that is driving the overall decline in broadcast TV consumption in Northern Ireland. Children watched 1 hour 25 minutes of TV a day – the lowest consumption for this age group across all the UK nations. The over-55s, on the other hand, watched 5 hours 24 minutes of TV a day – four hours more than children. While viewing among the over-55s has remained fairly stable, viewing among those aged 4-34 has declined by 48% since 2010. There has also been an acceleration in the decline in TV viewing among 35-54s in Northern Ireland, down by 12% since 2015.

**Figure 4: Average daily minutes spent viewing TV, by age group in Northern Ireland: 2010-2017**



Source: BARB. BBC areas.

### The PSB channels

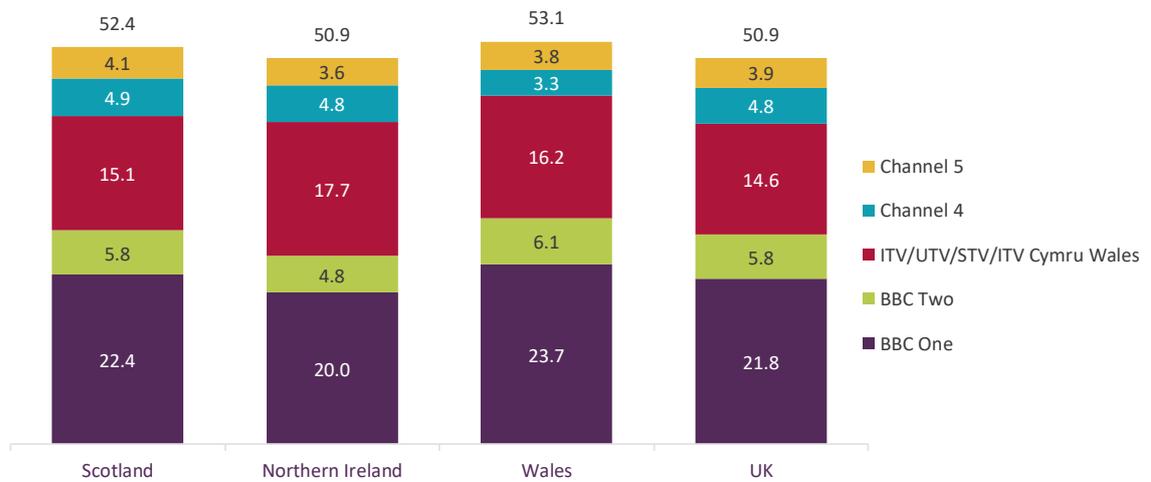
Public service broadcasting (PSB) is currently provided in Northern Ireland by the BBC, Channel 4, UTV (holder of the Channel 3 licence in Northern Ireland) and Channel 5. While all the BBC TV services are PSB, only the main channels of the other broadcasters are. In return for providing PSB services such as news and original productions, these broadcasters receive certain benefits, predominantly access to spectrum (the radio waves that support wireless communication) to broadcast their services; prominence on electronic programme guides on television (EPGs); and in the BBC's case, the licence fee.

## The public service broadcasters made up the majority of broadcast viewing in Northern Ireland

In 2017, the main five PSB channels (BBC One, BBC Two, UTV, Channel 4 and Channel 5) accounted for a combined 50.9% share of total TV viewing in Northern Ireland. This is on par with the UK average but below Wales and Scotland, where the main five PSBs have a higher audience share. The 50.9% PSB share in Northern Ireland represents a slight increase compared to 2016, when the main five PSBs achieved a share of 49.6%. For context, there were more than 342 BARB-reported channels in the UK in 2017, available to view via digital terrestrial television, satellite, cable and other platforms.

BBC One and BBC Two had lower shares in Northern Ireland than in any other UK nation or region. Conversely, UTV's viewing share was higher in Northern Ireland than across the nations and regions for the Channel 3 position.

**Figure 5: Percentage share of total TV viewing in the devolved nations of the UK for the five main PSB channels: 2017**



Source: BARB. BBC areas, all individuals (4+).

### ***I'm a Celebrity...Get Me Out of Here!* was the most watched programme in Northern Ireland in 2017**

The opening episode of *I'm a Celebrity...Get Me Out of Here!* on UTV was the most-watched programme in Northern Ireland in 2017. The next two most-viewed programmes in 2017 were BBC One's *Newsline* and UTV's *UTV Live* on 16 October, as viewers looked for the latest updates on Hurricane Ophelia. Of the top 20 programmes in 2017, 11 were broadcast on BBC One, while nine were broadcast on UTV.

**Table 6: Top 20 most-watched programmes in Northern Ireland: 2017**

Rank	Programme Title	Channel	Date	Average 000s	% TVR	% Share
1	I'm A Celebrity - Get Me Out of Here!	UTV	19/11/2017	409	23.5	53.3
2	BBC Newsline	BBC One Northern Ireland	16/10/2017	383	22.4	47.7
3	UTV Live	UTV	16/10/2017	380	22.1	50.5
4	Blue Planet II	BBC One Northern Ireland	26/11/2017	349	20.4	43.7
5	Mrs Brown's Boys Christmas Special	BBC One Northern Ireland	25/12/2017	347	20.2	40.2
6	Strictly Come Dancing	BBC One Northern Ireland	09/12/2017	332	19.4	46.7
7	Coronation Street	UTV	01/06/2017	327	19.1	44.7
8	Britain's Got Talent (Series 11)	UTV	22/04/2017	321	18.7	48.2
9	Strictly Come Dancing: The Results	BBC One Northern Ireland	12/11/2017	319	18.6	42.9
10	One Love Manchester	BBC One Northern Ireland	04/06/2017	319	18.6	46.6
11	Liar	UTV	16/10/2017	302	17.6	37.8
12	Emmerdale	UTV	11/01/2017	299	17.5	43.3
13	Diana, Our Mother: Her Life and Legacy	UTV	24/07/2017	296	17.3	40.7
14	Strictly Come Dancing Launch Show	BBC One Northern Ireland	09/09/2017	291	17.0	44.7
15	The Moorside	BBC One Northern Ireland	14/02/2017	281	16.5	38.4
16	Call the Midwife	BBC One Northern Ireland	05/02/2017	272	15.9	39.2
17	All Round to Mrs Brown's	BBC One Northern Ireland	01/04/2017	271	15.8	43.6
18	Ant & Dec's Saturday Night Takeaway	UTV	18/03/2017	270	15.8	43.4
19	BBC news	BBC One Northern Ireland	04/06/2017	263	15.3	45.2
20	Broadchurch	UTV	10/04/2017	257	15.0	33.3

Source: BARB. BBC areas, all individuals (4+). The TVR (television rating) is the measure of the popularity of a programme, daypart, commercial break or advertisement by comparing its audience to the population as a whole. One TVR is numerically equivalent to one per cent of a target audience.

### **Derry Girls has become Northern Ireland's biggest series ever**

2018's *Derry Girls* has become the biggest series ever in Northern Ireland, according to Channel 4.

Consolidated figures, which include time-shifted viewing over a seven-day period, show that the comedy had an average of 519,000 viewers in Northern Ireland on Channel 4, 64.2% share of the Northern Ireland total TV audience, when it was broadcast earlier this year.<sup>17</sup>

UK-wide figures show that the first series of *Derry Girls* was watched by an average of 2.5 million viewers, making it Channel 4's biggest comedy launch since 2004.<sup>18</sup> It is also the biggest ever comedy launch series on All 4.<sup>19</sup>

Channel 4 has commissioned a second series of the show, which is written by Derry native Lisa McGee and part-funded by Northern Ireland Screen.

<sup>17</sup> Source: BARB. Individuals in ITV Ulster area. Channel 4 Total (including HD and +1).

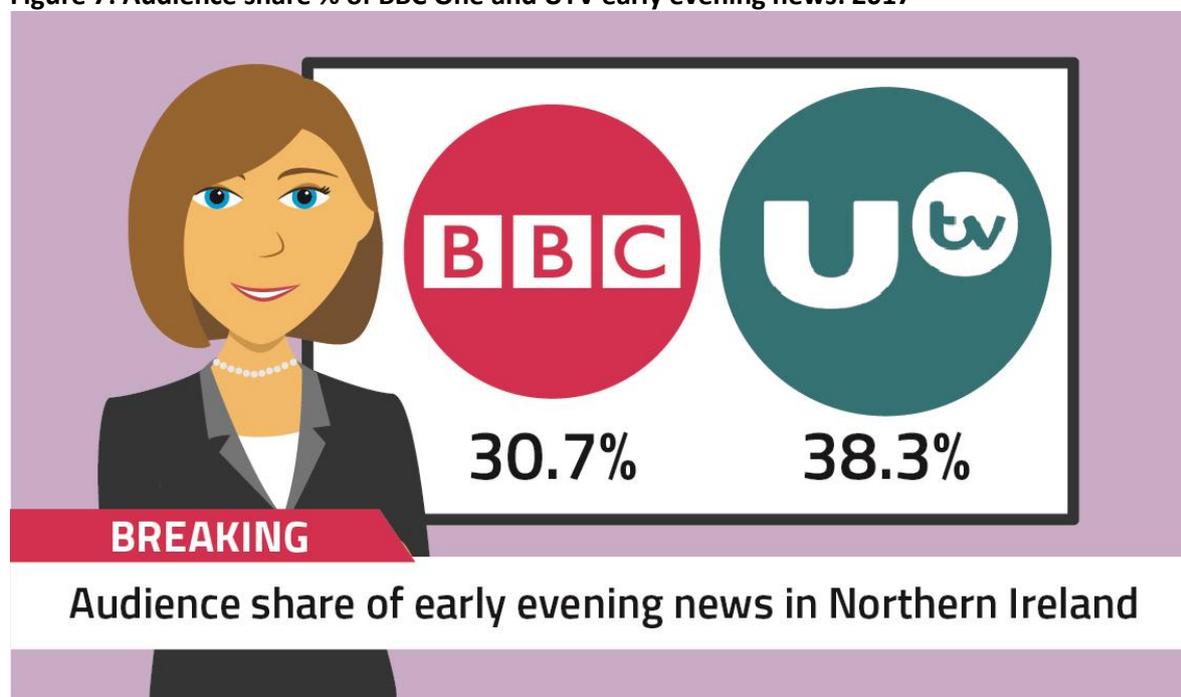
<sup>18</sup> Source: BARB. Individuals in UK network. Channel 4 Total (including HD and +1).

<sup>19</sup> Source: Channel 4

## UTV's early evening news bulletin attracts a greater share in Northern Ireland than the UK channel 3 average for the same slot

In 2017, UTV's early-evening news bulletin, *UTV Live*, attracted a 38.3% average share in Northern Ireland between 6pm and 6.30pm, just under double the Channel 3 UK average for the early-evening news bulletin slot (20.5%). This was markedly higher than in all other UK nations. BBC One's counterpart bulletin in Northern Ireland, *BBC Newsline*, attracted a lower average share (30.7%) between 6.30pm and 7pm. This is on par with the UK average for the BBC early evening news bulletin (30.9%).<sup>20</sup>

Figure 7: Audience share % of BBC One and UTV early evening news: 2017



Source: BARB. All individuals (4+). Note: Early evening ('local') news bulletin figures based on 'regional news' genre programmes, start time 17:55-18:35, 10mins+ duration, weekdays. UK averages based on share to respective early evening news bulletin time slots (using the London news schedule). BBC One's early evening news bulletin is transmitted between 18:30-19:00 and based on BBC areas. UTV is transmitted between 18:00-18:30 and based on ITV Ulster area.

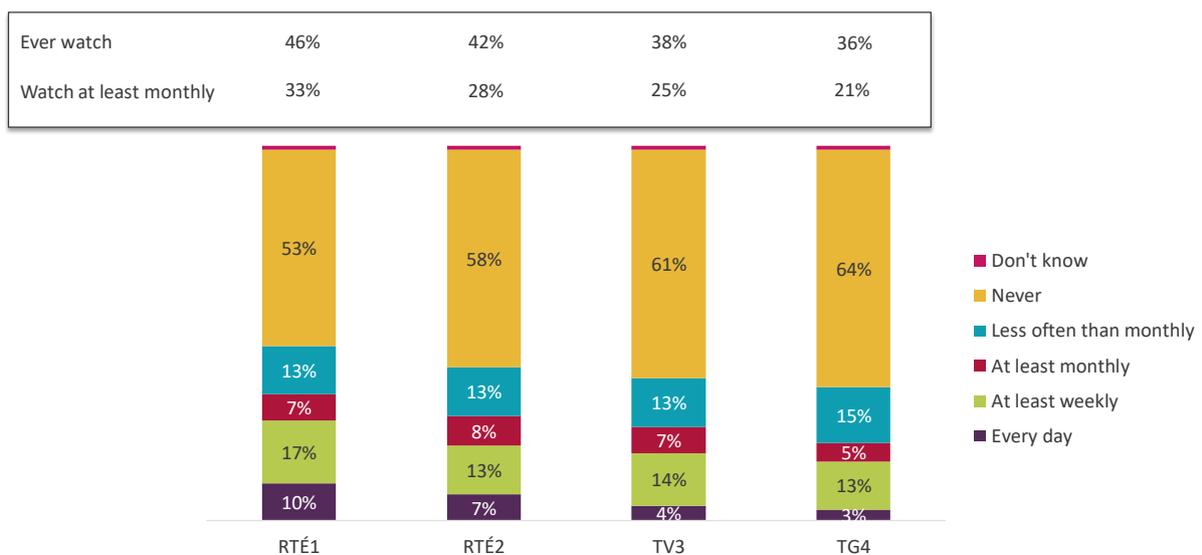
<sup>20</sup> Source: BARB. All individuals (4+). UK averages based on share to respective early evening news bulletin time slots (using the London news schedule). BBC One's news is based on BBC Ulster area, UTV news is based on ITV Ulster area.

## The two RTÉ channels remain the most-watched Republic of Ireland-originated TV channels in Northern Ireland

Republic of Ireland channels RTÉ One, RTÉ2 and TG4 (Irish language service) are available on a free-to-view basis to most of the population of Northern Ireland through a combination of Freeview and Saorview (via transmitters in the Republic of Ireland). TV3 and other services are available on Saorview only. RTÉ and TG4 services are also carried on other platforms including Sky, Virgin Media and BT TV.

Around a third of respondents in Northern Ireland with a TV in their household claimed to watch RTÉ One (33%) or RTÉ2 (28%) on at least a monthly basis in H1 2018.<sup>21</sup> This compares to a quarter of respondents who watch TV3 and two in five who watch TG4 on at least a monthly basis (25% and 21% respectively).

**Figure 8: Claimed viewing of ROI-originated TV channels in Northern Ireland**



Source: Ofcom Technology Tracker, H1 2018

Base: All adults aged 16+ in Northern Ireland with a TV in household (n = 484)

QH65: How frequently, if at all, do you watch each of these channels?

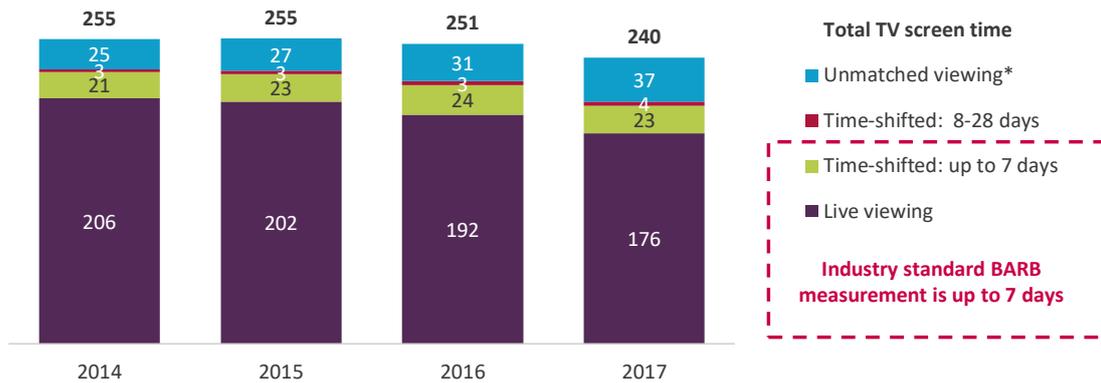
## Non-broadcast viewing on the TV screen continues to increase

As in the rest of the UK, although people in Northern Ireland are watching less broadcast television, they are spending more time watching other things on their TV set. Viewing of non-broadcast

<sup>21</sup> RTÉ, TG4, and TV3 viewing are not measured by BARB. Ofcom carries out research through its annual Technology Tracker survey to measure viewing of these channels in Northern Ireland.

services on the TV set (such as streaming services like Netflix and Amazon, or gaming) increased by six minutes a day to an average of 37 minutes per person per day in 2017. This increase only partly offset the declines in broadcast TV; overall TV screen time in Northern Ireland decreased by 11 minutes.

**Figure 3: Average daily minutes per person of total TV screen time in Northern Ireland**



Source: BARB. BBC areas, all individuals (4+). \* Note: Unmatched viewing refers to when the TV is in use, but content cannot be audio-matched or otherwise identified. It includes gaming, viewing DVDs/box sets/archives, subscription video-on-demand (SVoD), time-shifted viewing beyond 28 days, apps on smart TVs and navigation around EPG guides where there is no in-picture broadcast content. Audio-matched digital radio stations are excluded.



# TV programming for viewers in Northern Ireland

## Chapter overview

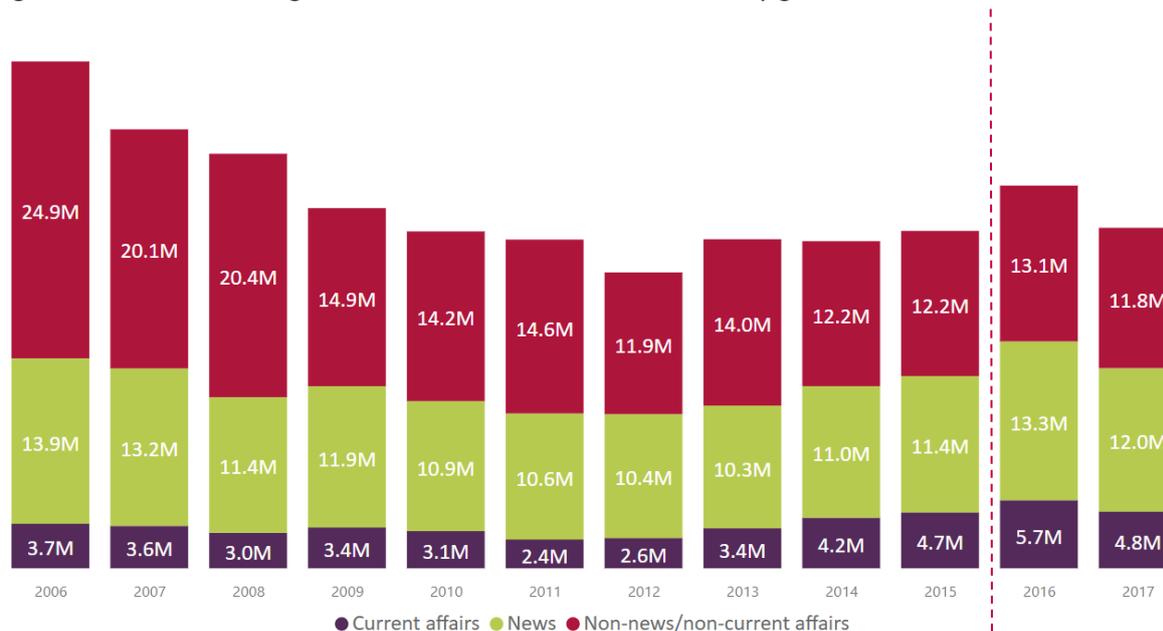
The BBC and UTV (owned by ITV since 2016) provide content to viewers in Northern Ireland over and above what is broadcast across the UK. This covers a range of genres but has a particular focus on news and current affairs.

The analysis below focuses on **first-run UK originations**, which are programmes commissioned by or for a licensed public service channel with a view to their first showing on television in the UK in the reference year. Spend on such content includes all costs incurred by the broadcaster associated with making programmes. These include both direct and indirect production costs for in-house productions and licensing costs for commissioned programmes, but exclude costs related to marketing and distribution.

## **There was an 11% real-terms decrease in spend on programming for viewers in Northern Ireland, by the BBC and UTV combined, in 2017**

In 2017, both broadcasters combined spent £28.6m on first-run UK-originated content for viewers in Northern Ireland, an 11% year-on-year decrease in real terms. £12m of this was on news, with an additional £4.8m spent on current affairs. A further £11.8m was spent on new UK content in other genres.

Figure 9: First-run UK-originated content for Northern Ireland, by genre

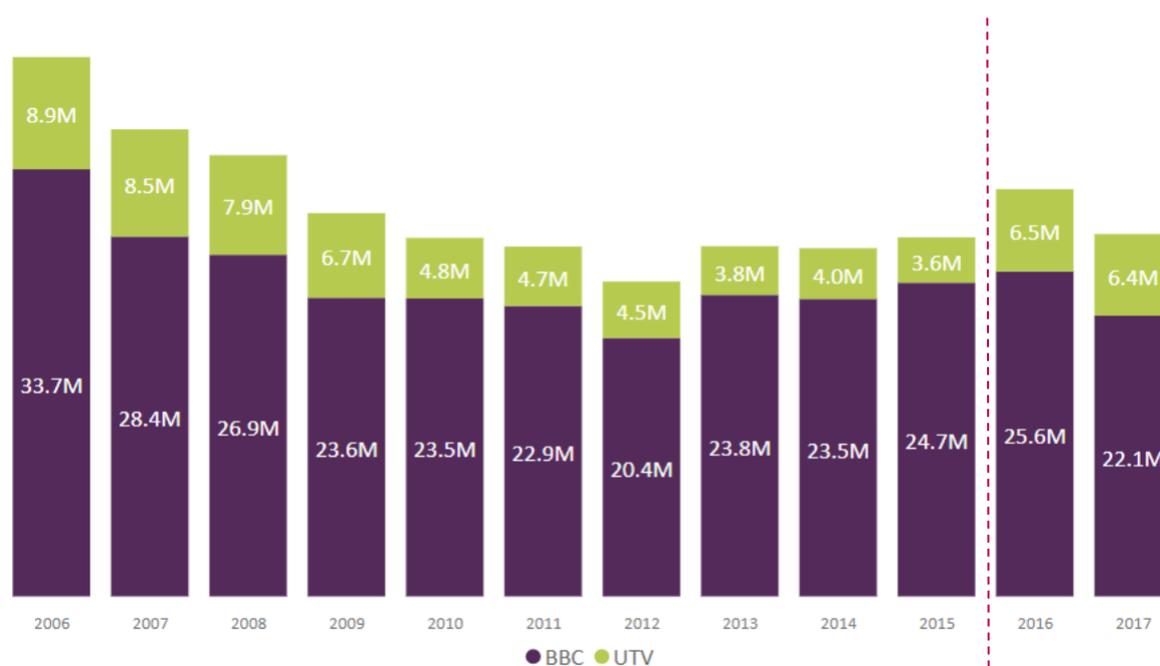


Source: Ofcom/broadcasters. Note: Figures are expressed in 2017 prices. Comparisons of UTV spend with years before 2016 should be made with caution. Prior to ITV's takeover of UTV in 2016, UTV did not charge staff costs to its news programmes, allocating direct costs only. From 2016, ITV has allocated relevant staff costs to UTV news programming, consistent with its approach across the rest of the ITV network.

## In 2017, BBC spend for viewers in Northern Ireland was at its lowest level since 2012

Both the BBC and UTV decreased their content spend in 2017. The BBC's real-terms spend was down by £3.5m (13.6%) year on year to £22.1m, the lowest figure since 2012. UTV's spend on first-run UK originations declined by 0.9% in real terms to £6.4m.

**Figure 10: PSB spend on non-network first-run UK originations, Northern Ireland (£m)**

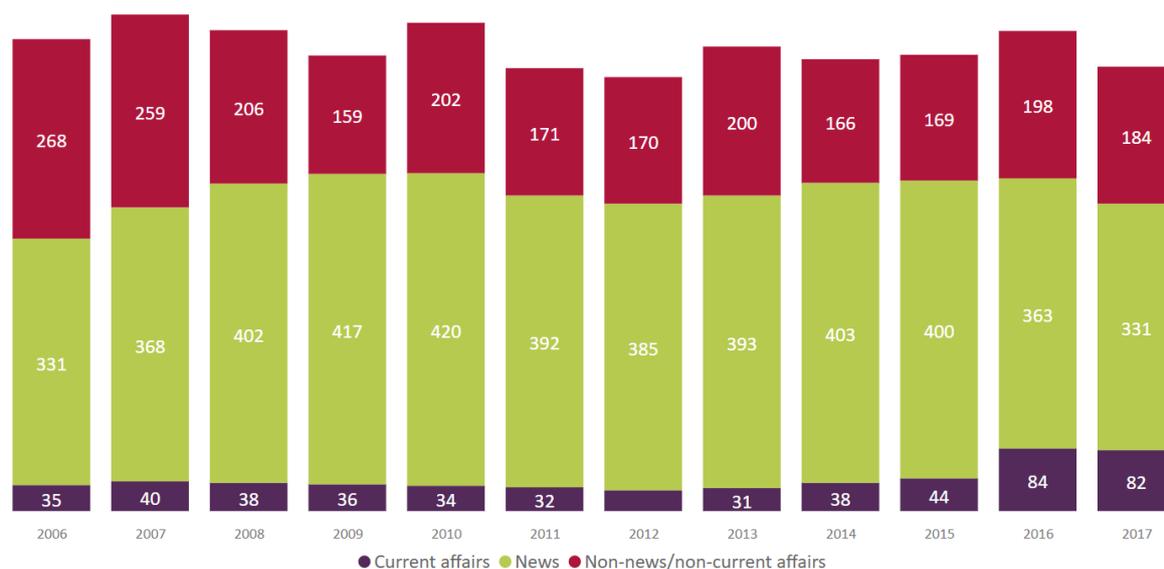


Source: Ofcom/broadcasters. Note: Figures are expressed in 2017 prices. Comparisons of UTV spend with years before 2016 should be made with caution. Prior to ITV's takeover of UTV in 2016, UTV did not charge staff costs to its news programmes, allocating direct costs only. From 2016, ITV has allocated relevant staff costs to UTV news programming, consistent with its approach across the rest of the ITV network.

## BBC news output for Northern Ireland continued to decline in 2017

There was a 7.4% fall in the number of first-run UK-originated hours shown across BBC Northern Ireland in 2017. News output fell by 8.8% to 331 hours and was at its lowest level since 2006. Other original programming for Northern Ireland (non-news/non-current affairs) was down 7.1% to 184 hours over the same period. With this decline in overall hours and spend in 2017, the cost per hour (CPH) of new BBC content for Northern Ireland stood at £37.1k, down from £39.7k in 2016.

**Figure 11: BBC hours of first-run UK-originated content for Northern Ireland, by genre**



Source: Ofcom/broadcasters.

### Local TV in Northern Ireland

Belfast-based NTV is Northern Ireland’s only local TV station, launching in 2014. The station is available in Greater Belfast on Freeview (Channel 7) and on the Virgin Media cable network across Northern Ireland (Channel 159). NTV broadcasts from 6am to midnight, 7 days per week, producing over 500 hours of original programming per annum.

The UK’s local TV services have programming commitments attached to their licences, typically to do with the required hours of local programming, including local news and current affairs. NTV’s commitments can be found on [Ofcom’s website](#).

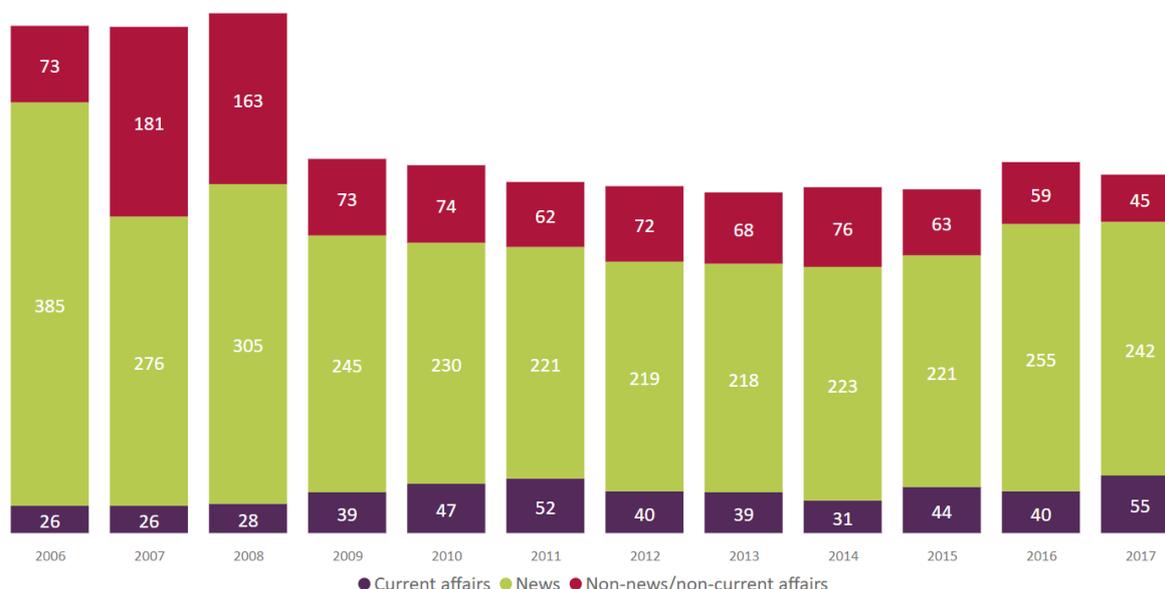
## There was a 3% drop in UTV’s new hours for Northern Ireland in 2017

There was a 3.4% fall in the number of new local hours (342) broadcast on UTV during 2017. This included a 5.1% fall in the number of news hours, to 242. Other programming (non-news/non-current affairs) was 23.7% lower, at 45 hours, while there was a 15-hour (37.5%) increase in hours of current affairs. With the decline in hours and a relatively stable level of spend, CPH for UTV increased to £18.9k in 2017, up from £18.4k in 2016.

UTV’s licence specifies that it must provide 4 hours of news programming and 2 hours of ‘other’ programming a week, averaged over a full calendar year excluding bank holidays and Christmas. This

was reduced from 5 hours and 4 hours respectively in 2009, as part of Ofcom’s second public service broadcasting review.<sup>22</sup> The performance in relation to these quotas is published in an [annex to this report](#).

**Figure 12: UTV hours of first-run UK-originated content for Northern Ireland, by genre**



Source: Ofcom/broadcasters.

UTV has moved to new premises at City Quays 2 in the Belfast Harbour Estate. The new facility includes studios, editing suites, corporate offices, news, administration, finance and sales areas. The move allows UTV to produce in-house studio programming, such as news, in high definition for the first time.

## Across the PSB channels, 0.9% of qualifying network content consisted of Northern Ireland productions in 2017

The public service broadcasters make programmes across the UK; this programming is assigned to the nations and regions of the UK based on Ofcom’s [regional production guidance](#).<sup>23</sup> Of all the qualifying hours broadcast across the UK in 2017, 0.9% were Northern Ireland productions, accounting for 1.2% of all qualifying spend, down from 1.5% of spend in 2016.

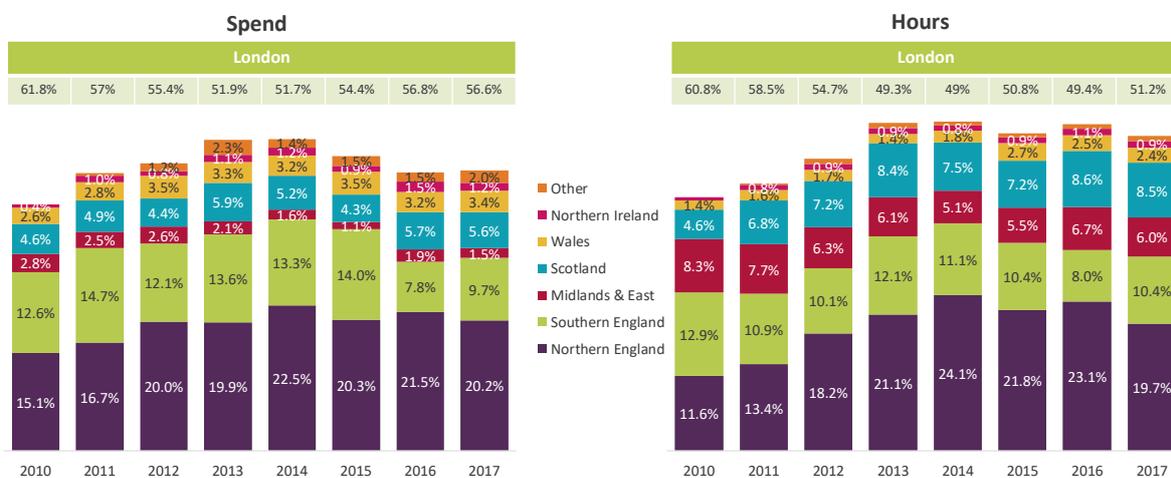
<sup>22</sup> Available at [https://www.ofcom.org.uk/consultations-and-statements/category-1/psb2\\_phase2](https://www.ofcom.org.uk/consultations-and-statements/category-1/psb2_phase2)

<sup>23</sup> The main purpose of the PSBs’ regional production requirements, measured against their out-of-London quotas, is to support and strengthen the TV production sector and creative economies in the nations and regions of the UK. Ofcom is currently reviewing the guidance, and published a call for evidence in March 2018: <https://www.ofcom.org.uk/consultations-and-statements/category-2/regional-production-programming-guidance-review>.

The bulk of these hours were BBC productions, with Northern Ireland productions making up 1.9% of the hours and 2.4% of the BBC’s qualifying network spend in 2017. This included high-volume productions such as *Wanted Down Under* as well as the fourth series of *Line of Duty*.

*The World’s Most Expensive Cars* was a notable Channel 4 production produced in Northern Ireland in 2017, while 2018’s *Derry Girls* will be reflected in next year’s figures. The vast majority of ITV (99.7%) and Channel 5 (98.8%) qualifying network productions continued to be produced in England in 2017.

**Figure 13: Expenditure on, and hours of, originated network productions outside London: 2011-2016**



Source: Ofcom/broadcasters.

Note: This expenditure does not include network news production. The category ‘other’ refers to programmes made by producers based within the M25 which qualify as regional productions on the grounds that 70% of total spend and 50% of off-screen talent spend was outside the M25, but not all in one macro-region, and therefore cannot be attributed to a single region. See [www.ofcom.org.uk/\\_data/assets/pdf\\_file/0019/87040/Regional-production-and-regional-programme-definitions.pdf](http://www.ofcom.org.uk/_data/assets/pdf_file/0019/87040/Regional-production-and-regional-programme-definitions.pdf) on Ofcom website for further details.

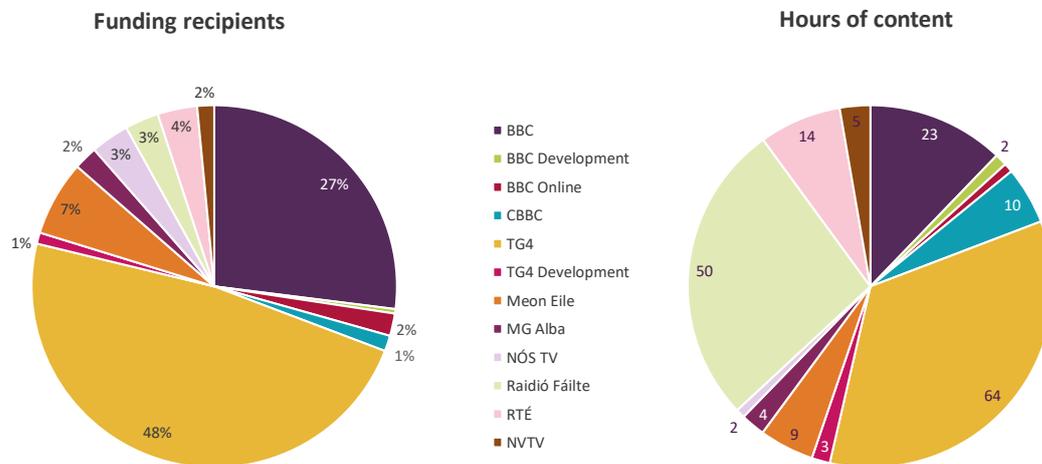
## The Irish Language Broadcast Fund provided £2.7m in 2017/18

Managed by Northern Ireland Screen, the Irish Language Broadcast fund (ILBF) continued to fund Irish-language content in 2017/18, the bulk of which will be broadcast on TG4 and BBC Northern Ireland. The BBC received 31% of the committed funding for 36 hours of content, while TG4 will receive 49% and will broadcast 67 hours of ILBF-funded content.

ILBF-funded content covers a range of genres, from children’s programming to documentaries. Recent programming highlights include *Eoin Mac Néill: Fear Dearmadta 1916*, which won two

awards at the Celtic Media Festival in 2017, and *Rocky Ros Muc* which won the Feature Documentary Award at the Galway Film Fleadh.

**Figure 14: ILBF funding recipients/hours: 2017/18**



Source: Northern Ireland Screen

Note: funded hours relate to financial commitments made during the financial year, but which may not have been broadcast in the same financial year. Figures were restated in October 2018.

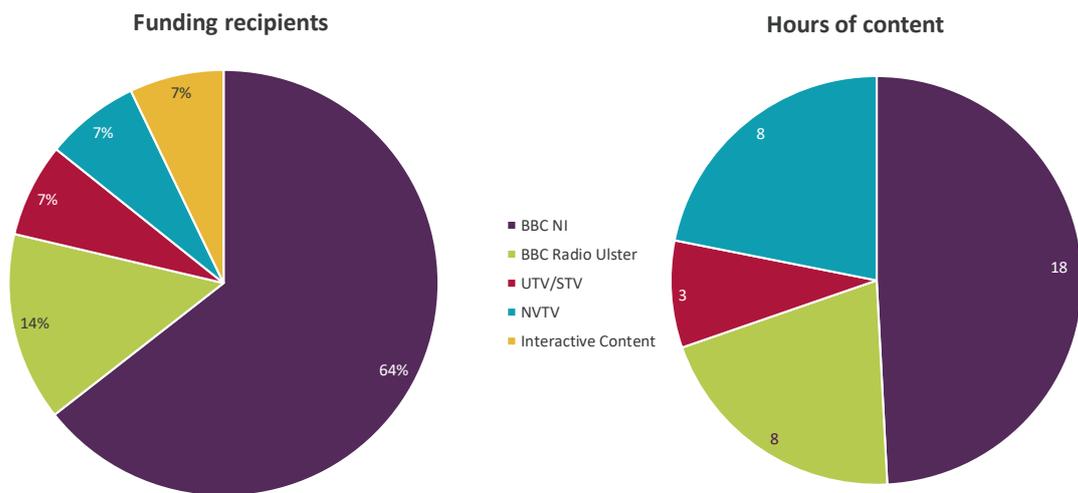
## The Ulster-Scots Broadcast Fund provided £1.6m in 2017-18

Eleven projects received committed funding from the Ulster-Scots Broadcast Fund (USBF) in 2017/18. More than three-quarters of the funding went to programming across the BBC, whether through BBC Northern Ireland (64.4%) or BBC Radio Ulster (14.3%).<sup>24</sup>

USBF-funded content ranged from factual entertainment programming and documentaries to music content over this period. Highlights include *The Languages of Ulster*, a tie-up with the Open University, and the three-part series *Wayfaring Strangers*, which looked at Scots migration to Ulster and America and the migrants' influence on music.

<sup>24</sup> Source: USBF

**Figure 15: USBF funding recipients/hours: 2017-18**



Source: Northern Ireland Screen

Note: funded hours relate to financial commitments made during the financial year, where programmes may not have been broadcast in the same financial year

**BBC adds Ulster-Scots and Irish programmes to iPlayer**

BBC Northern Ireland’s Ulster-Scots and Irish-language television programmes have been given a UK-wide platform.

A wide variety of programmes, all of which have been supported by Northern Ireland Screen’s Irish Language and Ulster-Scots Broadcast Funds, are now on a dedicated portal on BBC iPlayer; audiences will be able to access them beyond the standard 30-day period.



# Satisfaction with and perceptions of TV

## Chapter overview

This chapter examines TV audiences' overall satisfaction with PSB channels in Northern Ireland, as well as their opinions on the importance and delivery of a range of purposes and characteristics.<sup>25</sup> The data are drawn from Ofcom's 2017 PSB tracker survey<sup>26</sup>. The chapter then goes on to consider audience satisfaction with broadcasting standards, using data from Ofcom's 2017 cross-platform media tracker survey.

## Viewers in Northern Ireland are less satisfied than the UK average with PSB provision overall

Sixty-nine per cent of regular or occasional viewers in Northern Ireland of any PSB channel (BBC One, BBC Two, UTV, Channel 4 and Channel 5) claimed to be either very or quite satisfied with PSB broadcasting. This compares with 75% for the UK average, 75% in England, 72% in Wales and 71% in Scotland<sup>27</sup>.

About three-quarters of audiences in Northern Ireland rated highly PSBs' delivery of *'its news programmes are trustworthy'* (74%). This compares with 69% for the UK average, 68% in England, 65% in Wales and 79% in Scotland.

Figure 16 shows the ratings for the delivery of *'regional news programmes providing a wide range of good quality news about my area'* for BBC One, the Channel 3 licence holders and for all channels combined by nation. For BBC One, four in five regular viewers in Northern Ireland rated highly its

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<sup>25</sup> The statutory purposes and objectives of public service broadcasting are set out in Section 264 of the Communications Act 2003. In Ofcom's first PSB Review, we built on these, following extensive research and consultation, creating a framework of PSB purposes and characteristics

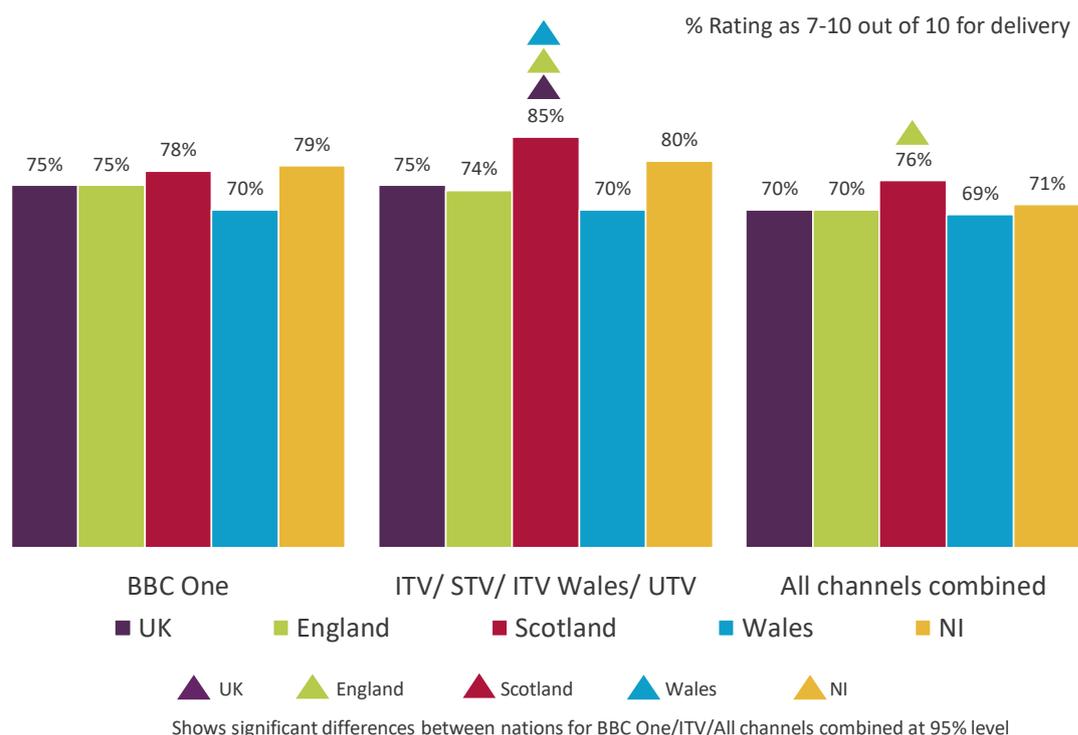
<sup>26</sup> For details on the methodology and questionnaire, please refer to the PSB tracker technical report on Ofcom's website <https://www.ofcom.org.uk/research-and-data/data/statistics/stats18>

<sup>27</sup> Ofcom PSB tracker 2017. For details on the methodology and questionnaire, please refer to the PSB tracker technical report on Ofcom's website <https://www.ofcom.org.uk/research-and-data/data/statistics/stats18>

wide range of quality news. This compares with 75% for the UK average, 78% in Scotland, 75% in England and 70% in Wales.

Audiences in Northern Ireland rated UTV similarly to BBC One; four in five regular viewers rated highly its wide range of quality news (80%). This is comparable to the UK average (75%) and the other nations: Scotland (85%), England (74%) and Wales (70%).

**Figure 16: Delivery of regional news programmes providing a wide range of good quality news, by nation: 2017**



Source: Ofcom PSB tracker 2017. Q15 How would you rate each channel individually on this statement, on a scale of 1 to 10, where 10 is the highest score and 1 is the lowest? Q16 How would you rate BBC One and ITV combined on this statement? Base for individual channels: Self-reported regular viewers of each in each nation (BBC One = 2207, 1384, 351, 292, 180; ITV1 = 1884, 1183, 286, 246, 169). Base for 'all channels combined': All respondents who ever watch any PSB channels in each nation (3098, 1957, 502, 400, 239).

## **PSB viewers in Northern Ireland feel that that the PSB channels portray the nation less effectively than do PSB viewers in England and Scotland**

Around half of all regular/occasional viewers in Northern Ireland (48%) rated highly the statement *'It portrays Northern Ireland fairly to the rest of the UK'*. This is similar to 47% in Wales and 56% in England, but significantly<sup>28</sup> lower than in Scotland (62%).

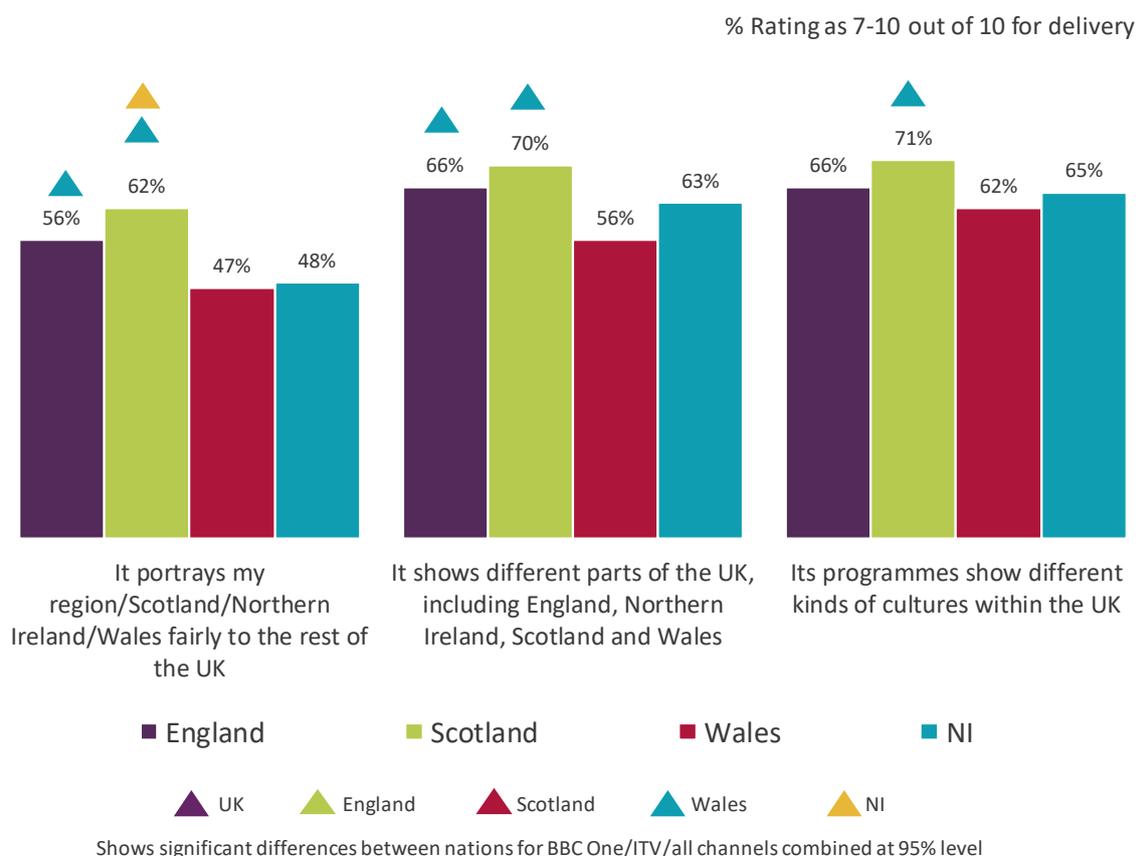
*'It shows different parts of the UK, including England, Northern Ireland, Scotland and Wales'* was rated highly for delivery by 63% of regular/occasional viewers of PSB channels in Northern Ireland. This compares with 56% in Wales, 66% in England and 70% in Scotland.

Sixty-five per cent of regular/occasional viewers of PSB channels in Northern Ireland rated *'Its programmes show different kinds of cultures within the UK'* highly. This is comparable to Wales (62%), England (66%) and Scotland (71%).

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<sup>28</sup> Throughout the *Satisfaction with and perceptions of TV* chapter of this report, 'significantly' has only been used to highlight any increase or decrease in scores that show statistically significant differences at the 95% confidence level for results compared within the current year, and at the 99% confidence level for results compared between years. For further details, please refer to the PSB tracker technical report on Ofcom's website <https://www.ofcom.org.uk/research-and-data/data/statistics/stats18>

**Figure 17: Reflecting identity/representing diversity in the nations, by nation: 2017**



Source: Ofcom PSB tracker 2017. Q15 How would you rate each channel individually on this statement, on a scale of 1 to 10, where 10 is the highest score and 1 is the lowest? Base: All respondents who watch any PSB channels regularly or occasionally in each nation: 2017 (1957, 502, 400, 239).

## Attitudes to TV in Northern Ireland

One of Ofcom’s duties under the Communications Act 2003 is to ensure that people who watch television and listen to the radio are provided with appropriate protection from harmful or offensive material. The Ofcom cross-platform media tracker survey looks at attitudes to offensive language, sex and violence on an annual basis. A third of television audiences in Northern Ireland (35%) feel that TV has got worse in the last year; that there is too much sex (35%), too much offensive language (39%) and too much violence (36%). This is on par with UK audiences overall<sup>29</sup>.

<sup>29</sup> Base sizes below 100. Treat as indicative only.

Percentage of adults who have seen something offensive on television...



Television has too much...



The watershed...

71% of adults are aware of the 9pm watershed  
72% of adults believe that 9pm is a suitable time for the watershed.

35% of adults thought the quality of TV got worse in the last year. Top reasons why:

- More repeats **67%**
- Too many reality shows **57%**
- Lack of quality **45%**
- Lack of variety **43%**
- More sex **19%**
- More violence **16%**
- More offensive language **13%**
- More antisocial behaviour **7%**
- More nakedness **6%**

12% of adults thought the quality of TV got better in the last year. Top reasons why:

- Wider range of programmes **75%**
- More/better dramas **55%**
- Improved quality **48%**
- More interesting/entertaining **48%**
- More up to date **23%**
- Better actors **7%**
- More/better films **3%**

Source: Ofcom cross-platform media tracker 2017. Base: All with any TV sets in 2017; UK (2,313); Northern Ireland (217)



# The radio listener

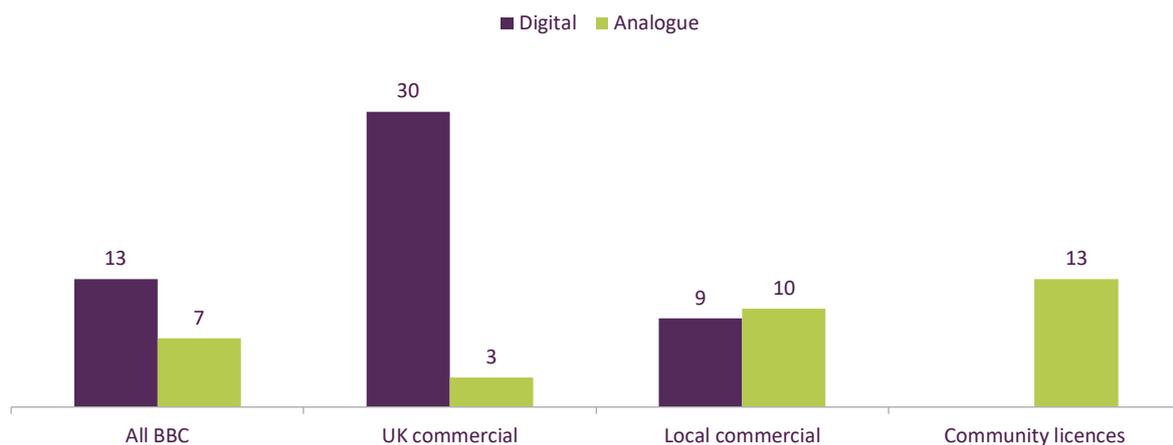
## Chapter overview

This chapter provides an overview of the key developments in the radio and audio market in Northern Ireland, including who is listening, how they are listening and what they are listening to. It also looks at the availability of DAB (digital audio broadcasting) services in Northern Ireland.

## There were 75 radio stations broadcasting in Northern Ireland in March 2018

These include 20 BBC and commercial stations on analogue (FM and AM), 13 community stations (FM), and 52 on DAB. Most of the DAB stations available in Northern Ireland (30) were commercial stations that broadcast across the UK.

Figure 25: Radio station availability: March 2018



Source: BBC / Ofcom, March 2018. Note: This chart shows the maximum number of stations available; local variations and reception issues mean that listeners may not be able to access all of them. The local commercial digital figure refers to the number of services carried by the local DAB multiplexes in Northern Ireland. Not all services will necessarily contain local content.

### New community radio licences awarded in Northern Ireland

Ofcom has awarded five new community radio licences for Northern Ireland in 2018.

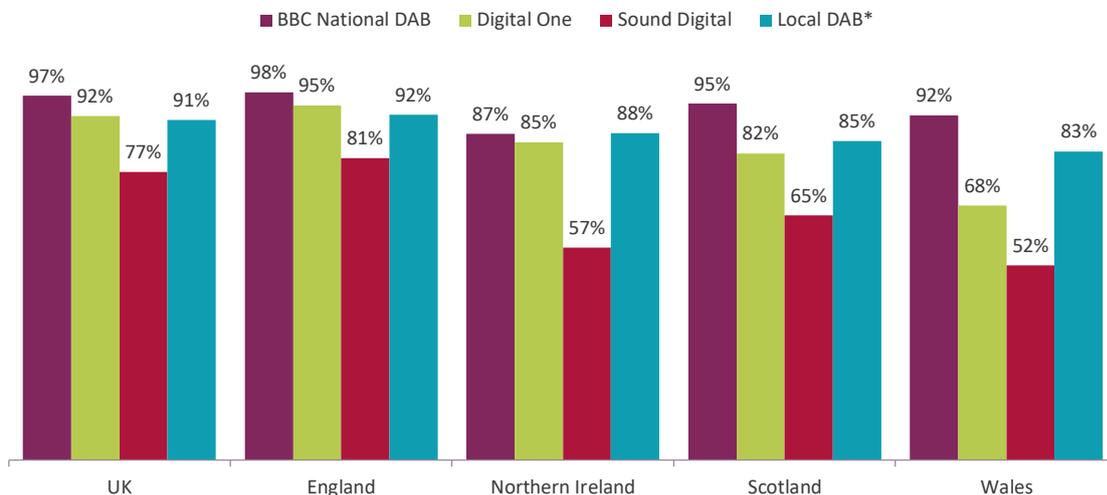
They are: Coast FM, which will serve students and young people in Coleraine; Coast Radio, which will provide a service to Larne, Carnlough and the Borough of Larne coast;<sup>30</sup> Bounce FM, which will cover Banbridge;<sup>31</sup> BE FM, a cross-community and non-denominational Christian radio station for listeners in Belfast; and Juice, which will serve the lesbian, gay, bisexual and transgender community in Belfast.<sup>32</sup>

They will join 13 community radio stations already operating in Northern Ireland; across the UK, there are more than 250.

## DAB services from the BBC are available to 87% of households in Northern Ireland

There was a 2pp increase in the household coverage of BBC DAB services from May 2017 to March 2018, reaching 87%. Coverage from the Digital One (85%) and Sound Digital (57%) multiplexes remained unchanged, while local DAB coverage stood at 88% in March 2018.

Figure 26: Household coverage of DAB (%)



Source: BBC, Arqiva, Ofcom, March 2018.

<sup>30</sup> <https://www.ofcom.org.uk/about-ofcom/latest/features-and-news/community-radio-licences-february-2018>

<sup>31</sup> <https://www.ofcom.org.uk/about-ofcom/latest/media/media-releases/2018/six-new-community-radio-licences>

<sup>32</sup> <https://www.ofcom.org.uk/about-ofcom/latest/media/media-releases/2018/eight-community-radio-licences>

## Q Network expands coverage

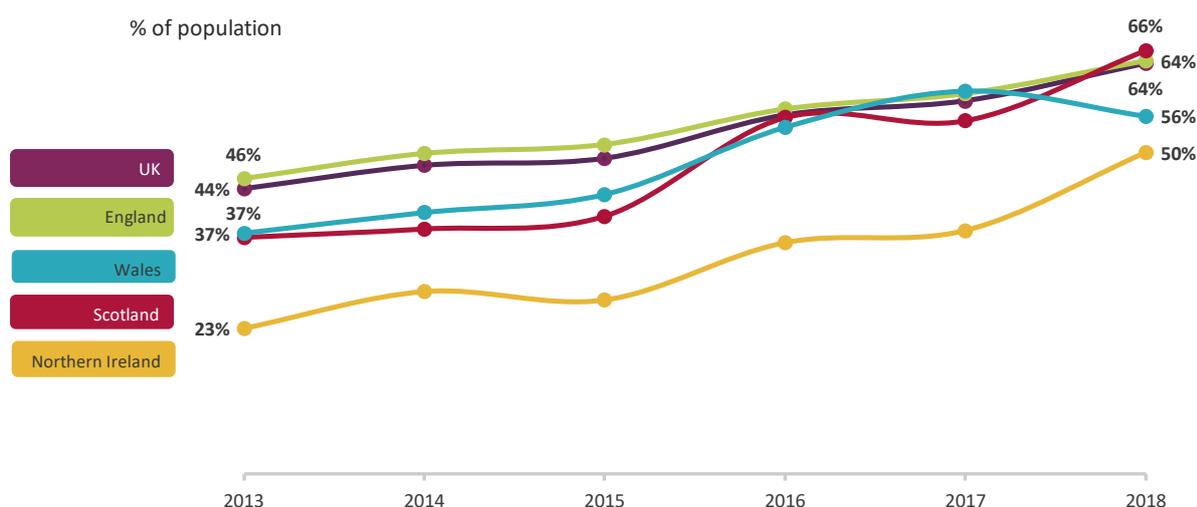
Q Network has expanded the coverage of five of its seven sub-regional licence areas in Northern Ireland with the addition of new relay transmitters.

The new transmitters are in Enniskillen, Ballycastle, Seefin Hill (Maghera), Larne and Newcastle. While improving and extending coverage generally, the new transmitters make Q Network available on FM in Larne and Newcastle for the first time.

## Take-up of digital radio has been slower in Northern Ireland than in the other UK nations

Half of all adults in Northern Ireland (50%) owned a DAB radio in Q1 2018, up from around one in four (23%) in 2013. However, this remains significantly lower than across the UK as a whole (64%), Scotland (66%) and Wales (56%).<sup>33</sup>

Figure 27: DAB ownership



Source: RAJAR<sup>34</sup>, all adults (15+), Q1 for each year.  
BBC nations'/local radio TSA<sup>35</sup> in each nation

<sup>33</sup> Ofcom's Technology Tracker also looks at DAB ownership in the home, which stood at 28% among all radio listeners in 2018.

<sup>34</sup> Radio Joint Audience Research: the official body in charge of measuring radio audiences in the UK

<sup>35</sup> RAJAR's Total Survey Area for a radio station

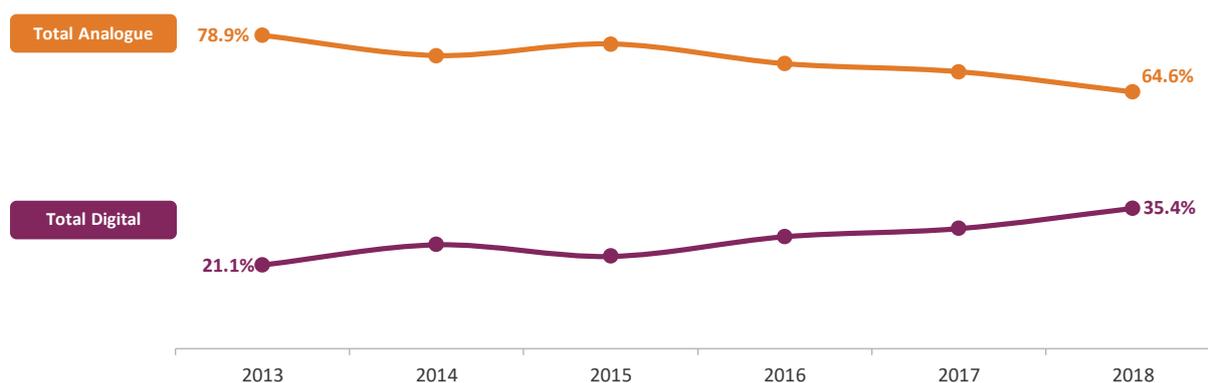
## A third of radio listening was through a digital platform at the start of 2018<sup>36</sup>

Across the UK the number of adults listening via analogue has dropped: from 81% in 2013 to 70% in 2018. In Northern Ireland the decrease is less marked (85% in 2013 compared to 82% in 2018).

In Northern Ireland there was a year-on-year increase of 5pp in the share of radio listening to digital radio (either online, through digital television or through a DAB set), to 35% of all listening hours at the start of 2018.

Despite this, digital radio listening in Northern Ireland, as a share of all radio listening, remained far lower than in the UK as a whole (51%), Scotland (47%) and Wales (47%) at the start of 2018.

**Figure 28: Share of listening hours on digital and analogue platforms in Northern Ireland: 2013-2018**



Source: RAJAR, all adults, Q1 of each year, BBC Radio Ulster TSA

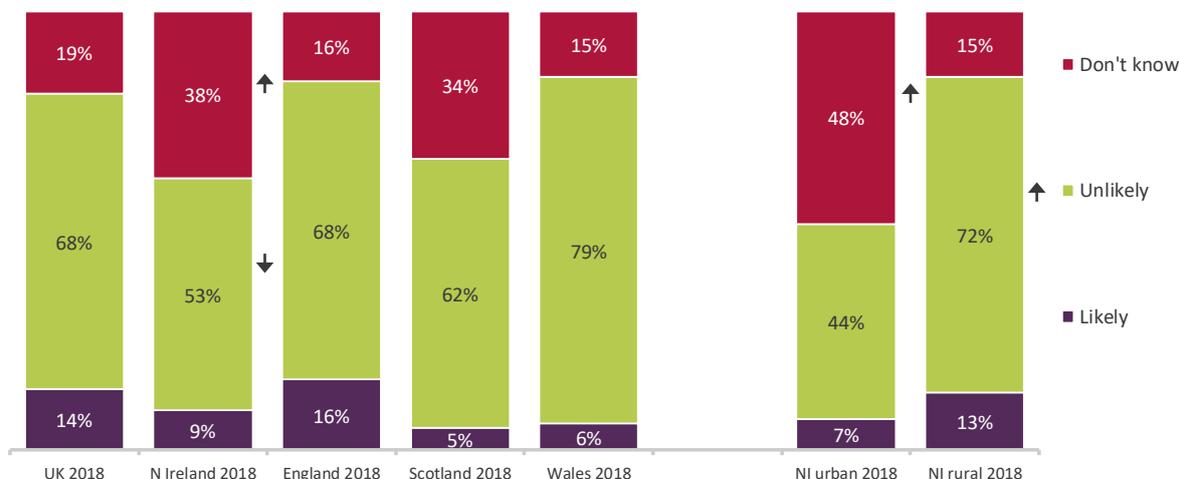
## Nearly one in ten radio listeners in Northern Ireland without a DAB set say they are likely to buy one in the next year

While 9% of radio listeners without a DAB radio in Northern Ireland say they are likely to get a DAB radio in the next 12 months, more than half are unlikely to do so (53%). Among those unlikely to get a DAB radio in the next 12 months, 61% said they had no need to do so while more than four in ten (42%) said they were happy to use an existing service.<sup>37</sup>

<sup>36</sup> DAB radio set, digital television and the internet.

<sup>37</sup> Ofcom Technology Tracker, H1 2018

**Figure 29: Likelihood of purchasing a DAB radio in the next year**



Source: Ofcom Technology Tracker, H1 2018. Base: Adults aged 16+ who listen to radio, have any active radio sets at home and do not have a DAB set\*\* (n = 675 UK, 106 Northern Ireland, 361 England, 110 Scotland, 98 Wales, 60\* Northern Ireland urban, 46\* Northern Ireland rural). \*Caution: Low base, treat as indicative only. Significance testing: Arrows indicate any significant differences at the 95% confidence level between Northern Ireland and the UK in H1 2018 and between Northern Ireland urban and rural in H1 2018. QP12: How likely is it that your household will get a DAB radio in the next 12 months?

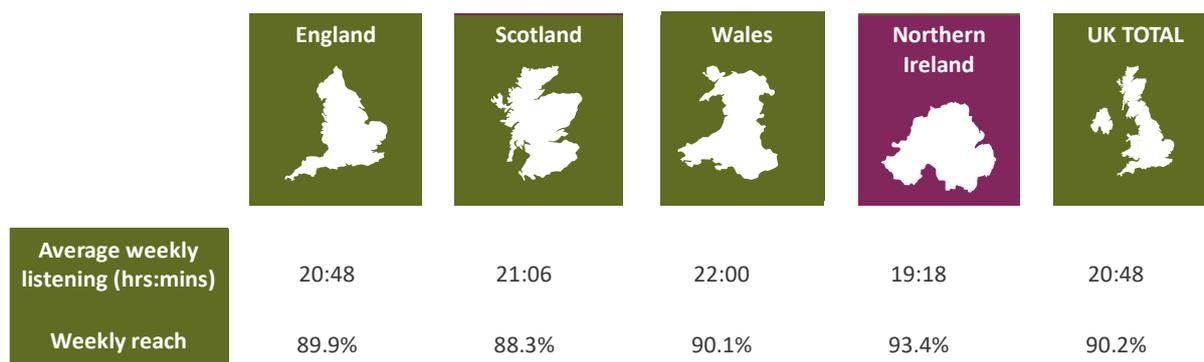
#### U105 goes digital

All Northern Ireland's local commercial and BBC radio stations are now available on DAB digital radio. U105, owned by The Wireless Group, started broadcasting on DAB in July 2017, giving the station country-wide coverage for the first time.

### More than 90% of Northern Ireland adults listen to the radio every week – the greatest proportion across the UK nations

However, at an average of 19 hours 18 minutes a week, they tune in for less time than listeners in the other nations. More people in Northern Ireland listen to commercial radio (71%) than to BBC radio (64%). Across the UK as a whole, audiences in each sector are much closer in size: 66% listen to commercial radio each week compared to 64% who listen to the BBC.

**Figure 30: Average weekly reach and listening hours**

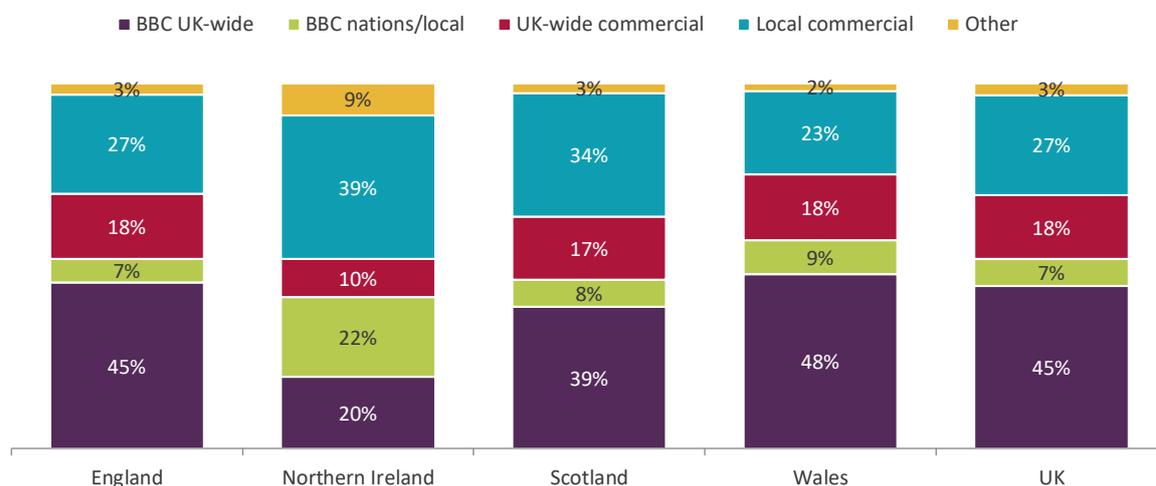


Source: RAJAR, all adults (15+), Q1 2018  
 BBC nations'/local radio TSA in each nation

## Local commercial radio made up 40% of all radio listening in Northern Ireland in 2017

Local radio continued to make up most of all radio listening hours in Northern Ireland in 2017. At 60%, this was significantly higher than the UK average (34%), Scotland (43%) and Wales (29%). Local commercial stations had a listening share of 40% while the BBC's local services for Northern Ireland - BBC Radio Ulster and Foyle - commanded a 20% share in 2017.

**Figure 31: Share of listening hours, by nation**

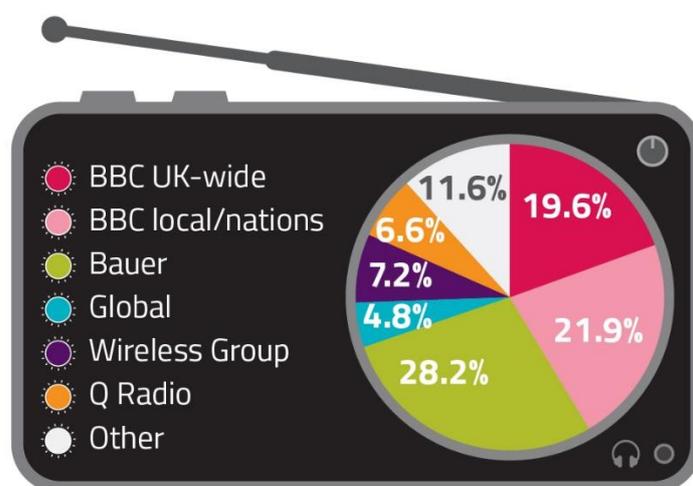


Source: RAJAR, all adults (15+), Q1 2018  
 England = BBC local radio in England TSA; Scotland = BBC Radio Scotland TSA; Wales = BBC Radio Wales TSA;  
 Northern Ireland = BBC Radio Ulster TSA

## Bauer stations accounted for more than a quarter of all listening in Northern Ireland in Q1 2018

Within Northern Ireland, the BBC had a 41.5% share of the radio market in Q1 2018. Of the commercial radio groups, Bauer Radio – which owns stations including Cool FM and Downtown Radio – had the largest proportion of the market at 28.2%, followed by Wireless Group, owner of U105, with 7.2%. Listening to ‘other’ radio was relatively high in Northern Ireland (11.6% share) due to the additional availability of stations broadcast from the Republic of Ireland while the stations from Q Radio had a share of 6.6%.

Figure 32: Share of listening in Northern Ireland, by radio group

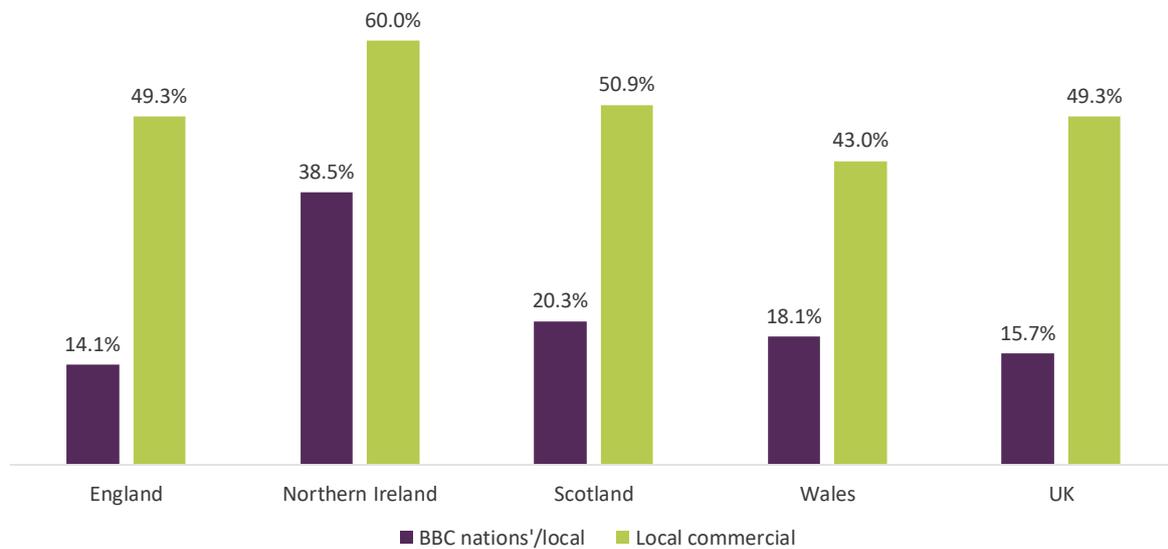


Source: RAJAR, all adults (15+), Q1 2018. BBC Radio Ulster TSA

### Local commercial radio is more popular in Northern Ireland than in the rest of the UK

Local radio (commercial or BBC) also had greater reach in Northern Ireland, with 78% listening each week, compared to just 56% across the UK as a whole. Almost two-thirds of adults in Northern Ireland listen to local commercial stations (60%) and more than a third (39%) listen to BBC nations/local radio. Listening to local commercial services has increased from 55% five years ago, although BBC nations/local listening has remained stable (35% in 2013).

**Figure 33: Weekly reach to local radio – BBC vs. commercial**



Source: RAJAR, all adults (15+), Q1 2018  
BBC nations'/local radio TSA in each nation

## **BBC Radio Ulster was the most popular radio station in Northern Ireland in Q1 2018**

BBC Radio Ulster was the most listened-to radio station across Northern Ireland<sup>38</sup> in Q1 2018, with a reach of 38.5%, followed by Cool FM at 32.0%. However, there are differences in radio listening habits depending on where people live and what stations are available.

Within the Belfast area, where 60% of the Northern Ireland population live,<sup>39</sup> Cool FM had a greater reach than across Northern Ireland as a whole, at 38.2%, with BBC Radio Ulster the second most popular station with a reach of 36.2%. This is likely to be because Cool FM is available on both FM and DAB in Belfast, whereas elsewhere in Northern Ireland it is only on DAB.

<sup>38</sup> RAJAR's BBC Radio Ulster TSA

<sup>39</sup> RAJAR's U105 TSA.

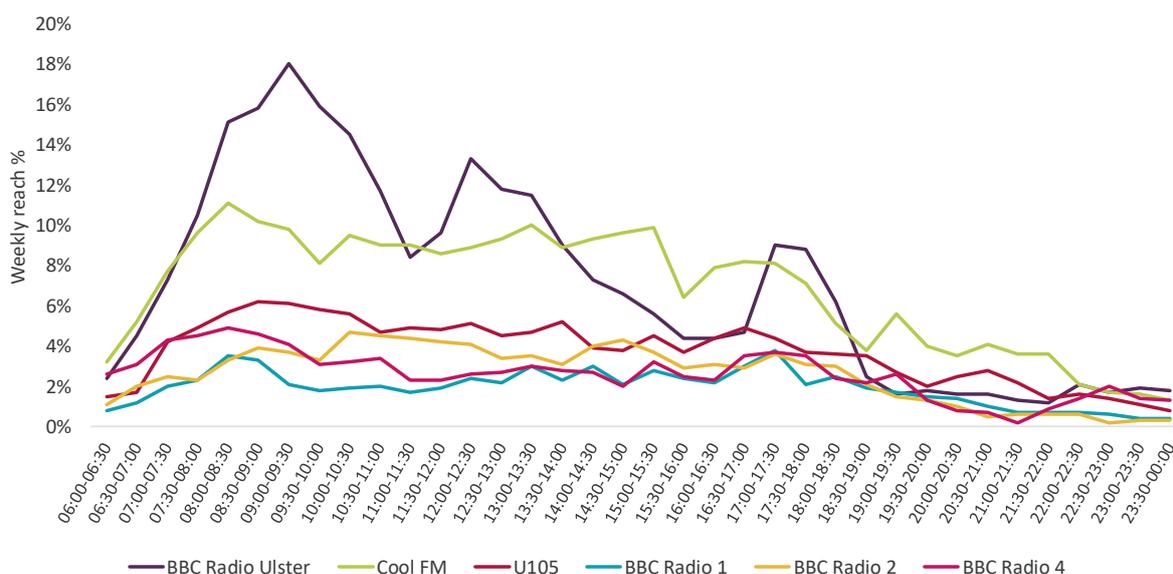
**Table 34: Top three radio stations, by region**

	UK		Northern Ireland*		Belfast**	
Rank	Station	Weekly reach (%)	Station	Weekly reach (%)	Station	Weekly reach (%)
1	BBC Radio 2	28.3%	BBC Radio Ulster	38.5%	Cool FM	38.2%
2	BBC Radio 4	20.0%	Cool FM	32.0%	BBC Radio Ulster	36.2%
3	BBC Radio 1	17.4%	BBC Radio 1	18.8%	U105	19.1%

Source: RAJAR Q1 2018 \* BBC Radio Ulster TSA. \*\*U105 TSA

The peak time to listen to the radio during the week in Belfast is between 9.00 and 9.30am. The most listened-to programme at this time in this area is BBC Radio Ulster’s *The Nolan Show*. Across the duration of the show<sup>40</sup> it reaches 21% of the Belfast area, slightly lower than the 23.1% reach across Northern Ireland as a whole.

**Figure 35: Average audience across the day in Belfast, Mon-Fri**



Source: RAJAR Q1 2018, all adults 15+. U105 TSA.

<sup>40</sup> 09:00-10:30 Monday-Friday

## Local commercial radio in Northern Ireland generated £7.59 per head in 2017

Local analogue commercial radio stations in Northern Ireland such as Cool FM, Q Radio and U105 generated £7.59 per head of population in 2017. This was greater than the UK as a whole and unchanged in real terms since 2016.

**Figure 36: Local commercial radio, revenue per head (£): 2017**



Source: Ofcom/broadcasters. Note: These figures relate to relevant turnover of AL licences (local analogue commercial) and include local and national revenues and sponsorship.