

# Media nations: Northern Ireland 2019



# Overview

This is Ofcom's second 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 in 2018), 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 also use third-party sources for information relating to these services.

# Contents

Overview.....	1
Key points .....	3
TV services and devices.....	5
Screen viewing.....	10
TV programming for and from Northern Ireland.....	21
Radio and audio .....	29



# Key points

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

- On average, people in Northern Ireland spend 3 hours 5 minutes per day watching broadcast television on the TV set, less than any of the other nations. Daily viewing in Northern Ireland declined by 6.9% between 2017 and 2018 – the largest decline of all UK nations.
- Viewing of non-broadcast services on the TV set (such as streaming services like Netflix and Amazon Prime Video, or gaming) increased by five minutes a day to an average of 42 minutes per person per day in 2018.
- The second episode of the first series of *Derry Girls* on Channel 4 was the most-watched broadcast programme on TV sets in Northern Ireland in 2018. This episode achieved an average audience of 608,000 and a share of 70% of those watching TV at that time.

## Two-thirds of TV households have a television set connected to the internet

- More than two-thirds (67%) of households in Northern Ireland had some form of connected TV in 2019, 57% in England, 56% in Scotland and 48% in Wales.
- Just over half of adults in Northern Ireland (53%) said they used an on-demand/streaming service in 2019.
- Among these services, Netflix continued its popularity with four in ten (41%) adults claiming to use it – an increase from 29% in 2018.

## More than half of all broadcast TV viewing in Northern Ireland in 2018 was to the main PSB channels

- In 2018, the main five PSB channels (BBC One, BBC Two, UTV, Channel 4 and Channel 5) accounted for a combined 52.3% share of total TV viewing in Northern Ireland. This was above the England average but below Wales and Scotland.
- BBC One and BBC Two had lower viewing shares in Northern Ireland than in any other UK nation. Conversely, UTV's and Channel 4's viewing shares were higher in Northern Ireland than their equivalents in the other nations.
- Television remains the most-used platform for news consumption for people in Northern Ireland, with UTV and BBC One being the most-used news sources overall.



## Up to a fifth of respondents in Northern Ireland with a TV in their home claimed to watch one of the Irish channels at least weekly

- Each had comparable viewing among our respondents – RTÉ One (20%), RTÉ2 (18%), TV3 (now Virgin Media One, 16%) and TG4 (15%).

## More than three-quarters of PSB viewers in Northern Ireland were satisfied with PSB provision in 2018 (77%)

- This compares with 74% for the UK average, 74% in England, 74% in Wales and 73% in Scotland.
- PSB services were rated marginally lower by viewers in Northern Ireland (51%) compared to the other nations: England (55%), Scotland (55%) and Wales (52%), for the delivery of *'showing different parts of the UK, including England, Northern Ireland, Scotland and Wales'*.

## Spend on programming for Northern Ireland by the BBC and UTV combined decreased by 6% in real terms in 2018 to £27.4m

- Of the £27.4m spent in 2018, £10.6m was spent on news, the lowest level of news spend over the past 12 years for Northern Ireland.
- In 2018, BBC hours of first-run content for Northern Ireland fell by 6% to 561 hours.
- UTV's local hours content increased by 5% from the previous year to 358 hours, the highest level in ten years.

## Adults in Northern Ireland are more likely than those in any other nation to listen to the radio, with 93% tuning in each week

- Local radio accounts for 60% of listening in Northern Ireland, far higher than counterpart stations in Scotland (41%), Wales (31%) and England (31%).
- There was a 10% increase in the digital share of listening in Q1 2019 compared to the same period in 2018, the highest growth of any UK nation.
- However, listening through a digital platform still only accounts for 39.5% of total listening in Northern Ireland compared to 56.4% across the UK. DAB take-up is also lower, at 45.9% compared to 66.7% across the UK.
- The use of smart speakers is increasing in the home. Just over a fifth (22%) of Northern Ireland households own a smart speaker – up 7pp since last year.



# TV services and devices

## Introduction

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 Prime Video.

These platforms rely on different infrastructure to deliver their services. Freeview uses a network of main and relay transmitters across Northern Ireland to deliver television services into people's homes. These services are widely though not universally available across Northern Ireland.

Satellite, which only requires a user to attach a dish to their home, is universally available across Northern Ireland. Cable coverage, by comparison, is more limited as it requires a provider to have laid a cable past the premises in order for it to be connected.

Services such as Netflix, Amazon Prime Video and YouTube are delivered over the internet through connected TVs as well as mobile phones and tablets. Ofcom research shows that 82% of households in Northern Ireland had a fixed internet connection in 2019; some 82% of adults in Northern Ireland now own a smartphone, while 64% of households have a tablet device.<sup>1</sup>

## 98% of premises in Northern Ireland have DTT coverage in 2019<sup>2</sup>

Digital terrestrial television (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. These multiplexes are the transmission infrastructure that deliver channels carried on the Freeview platform.

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<sup>1</sup> Ofcom Technology Tracker 2019

<sup>2</sup> Ofcom analysis of DTT coverage and operator data, January 2019

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 2019, 98% of premises in Northern Ireland had access to the core PSB services. Coverage of the commercial multiplexes, which are carried on the main transmitters only, reaches 74.1% of premises. A significant number of homes in Northern Ireland can also access Republic of Ireland TV channels from via overspill from transmitters based there.<sup>3</sup>

Northern Ireland had the highest proportion of households of all the UK nations which had a working TV set at the beginning of 2019 (97.1%). DTT is the most popular TV platform in Northern Ireland, with 40.9% of households having it as their only TV service in the first quarter of 2019.<sup>4</sup>

## **More than a third of homes in Northern Ireland have a satellite service**

Satellite TV services are provided by Sky and Freesat and are available to about 98% of UK premises<sup>5</sup>, with broadly the same level of availability across Northern Ireland.

Paid satellite was the most popular pay-TV service in Northern Ireland in Q1 2018, in 37% of homes. An additional 4.6% had a free satellite service, probably from Freesat. At 41.6%, the proportion of homes in Northern Ireland with any satellite service was greater than the UK average's 36.9% at the beginning of 2019.<sup>6</sup>

## **One in ten homes have a cable TV service**

Virgin Media's cable service was available to 39.2% of premises across Northern Ireland in January 2019.<sup>7</sup> One in ten homes (11.4%) in Northern Ireland had a cable TV service at the beginning of 2019, lower than the 13.6% average for all the UK.<sup>8</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 YouView.

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<sup>3</sup> Ofcom analysis of DTT coverage and operator data, January 2019

<sup>4</sup> BARB Establishment Survey Q1 2019

<sup>5</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

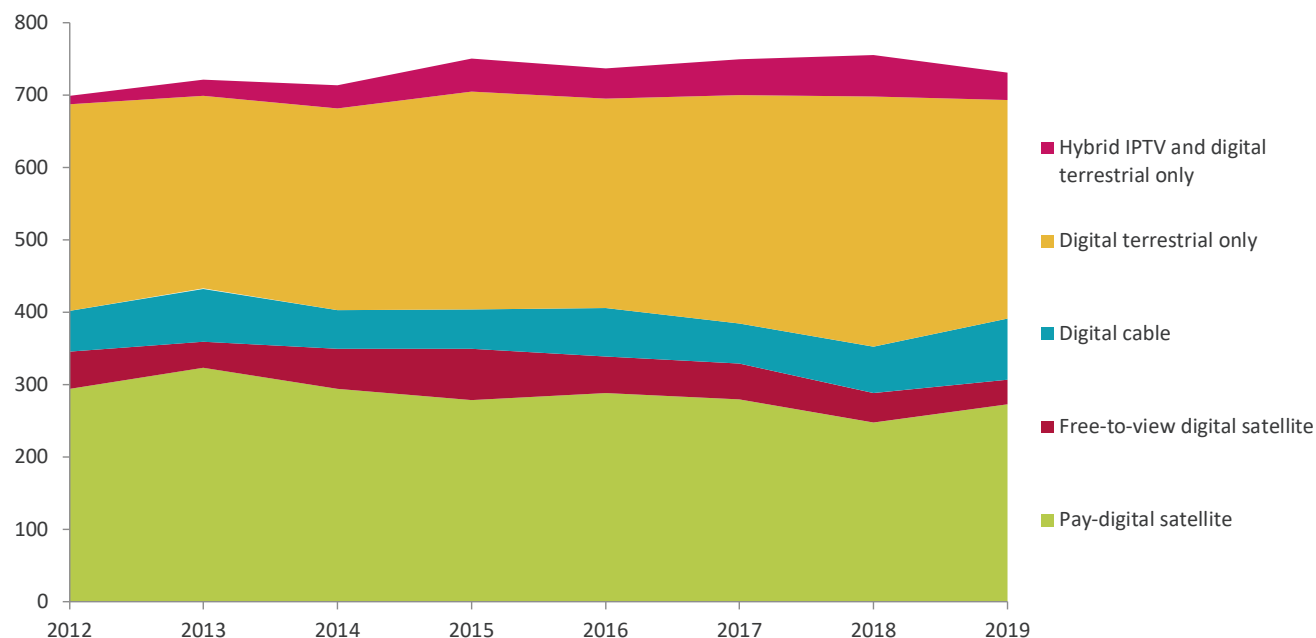
<sup>6</sup> BARB Establishment Survey Q1 2019

<sup>7</sup> Ofcom analysis of operator data, January 2019

<sup>8</sup> BARB Establishment Survey Q1 2019

Take-up of households with IPTV and without also having cable, satellite or any other TV service in Northern Ireland had been growing each year, but it decreased from 7.9% of homes in Q1 2018 to 5.1% in Q1 2019. This is the lowest it has been since 2014 (when it was 4.5%).<sup>9</sup>

**Figure 1: Platform take-up in Northern Ireland: 2012-2019, households (000s)**



Source: BARB Establishment Survey. BBC Ulster area. 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.

## Two-thirds of TV households have a television set connected to the internet

The number of households connecting their TV to the internet is increasing across the UK. As well as using a smart TV, other devices (such as a set-top box, streaming stick, games console, etc) can also be connected, allowing online content to be viewed on the TV set.

More than two-thirds (67%) of households in Northern Ireland had some form of connected TV in 2019, compared to 57% in England, 56% in Scotland and 48% in Wales.<sup>10</sup>

<sup>9</sup> BARB Establishment Survey Q1 2019, Q1 2018, Q4 2014.

<sup>10</sup> Ofcom Technology Tracker 2019



## More than half of adults in Northern Ireland use video-on-demand services

Over half of adults in Northern Ireland (53%) claimed to use any type of on-demand service (whether paid-for or free) in 2019.

Among these services, Netflix had the most claimed use (41%), followed by BBC iPlayer (23%), All4 and ITV Hub (21% and 20% respectively).<sup>11</sup>



*Paying for on-demand content does not appear to be a deterrent; nearly half (46.1%) of all households in Northern Ireland had a paid-for subscription-on-demand service (SVoD) in Q1 2019. This is up from 35.6% in Q1 2018. As with the rest of the UK, Netflix is the most popular service (in 41.4% of all homes in Northern Ireland).<sup>12</sup>*

### More SVoD services are on the way

Disney and WarnerMedia and Apple, and the BBC and ITV are set to launch their own SVoD services in 2019 and 2020, increasing the number of services in the SVoD market, currently led by Netflix and Amazon Prime Video.

**Apple TV+** is set to launch in autumn 2019, and globally shortly after. The app will be also available on non-Apple devices. The service will provide original content ad-free; Apple currently has 30 original web series and movies in preparation.

**Britbox** is a joint BBC and ITV venture due to be launched in Q4 2019 at £5.99 per month. ITV will control the venture with a 90% share, with the BBC having the option to increase its holding to 25%. The service will contain archive content as well as Britbox original content commissioned from UK production companies, planned to be available in 2020.

**Disney+** is set to launch in the US in November 2019 and then globally shortly after. Disney+ will exclusively stream content from its popular brands Marvel, Lucasfilm and Pixar, offering 500 movies and access to 7,500 episodes.

**WarnerMedia** is also set to launch the HBO Max service in Spring 2020. The service will include HBO, Turner as well as WarnerMedia content.

<sup>11</sup> Ofcom Technology Tracker 2019

<sup>12</sup> BARB Establishment Survey Q1 2019





## Introduction

In recent years, there has been a significant rise in the number of new TV services delivered over the internet. At the same time, viewers have started using new devices, such as smartphones and tablets, to view this and other content. Younger viewers especially are avid adopters of these services and devices.

This is inevitably having an impact on our TV watching habits. However, our research shows that this trend is gradual rather than precipitous. Take-up of what might be termed 'traditional' TV platforms and services, such as Freeview, satellite and cable, remains strong. And while there has been a further drop in the amount of live TV viewing in 2018 in all the nations of the UK, this activity still accounts for significant majority of people's screen time.

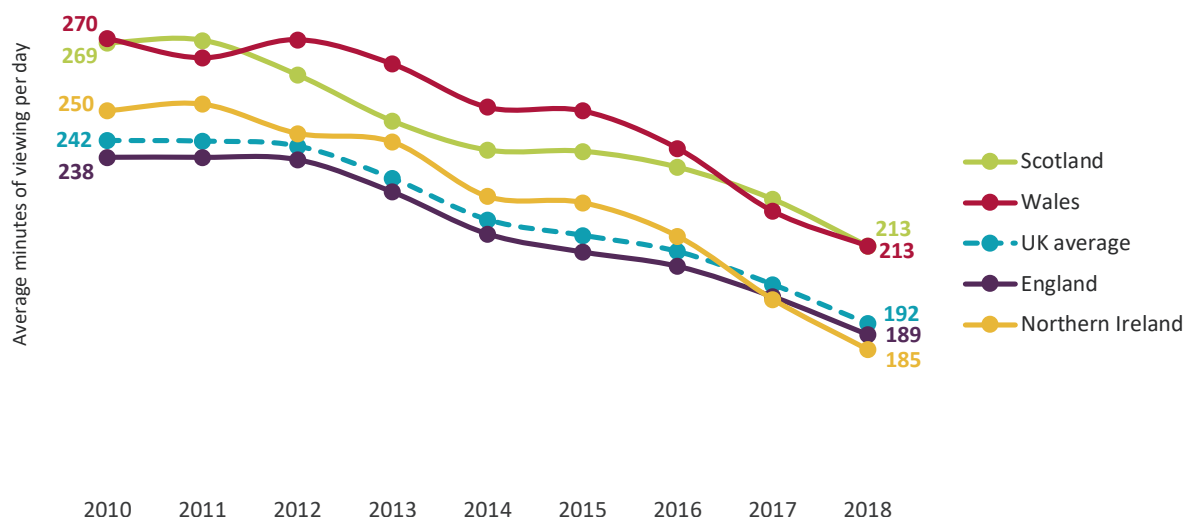
### Where our data comes from

This section uses data provided by the Broadcasters' Audience Research Board (BARB), a nationally representative panel of 5,300 homes across the UK (with more than 300 in Northern Ireland) 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, streaming device or set-top box. BARB has also started to measure what people are watching on PCs/laptops, tablets and smartphones not connected to the TV set, to monitor viewing of broadcaster video-on-demand (BVOD) services. However, this newer measurement of other devices is not complete and is not yet the industry standard. Unless otherwise stated, figures quoted are for seven-day consolidated viewing on the TV set. 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 2018

On average, people in Northern Ireland spent 3 hours 5 minutes per day watching television in 2018; lower than any other nation and the UK average. This was a 14-minute (6.9%) year-on-year decline in viewing, the largest decline of all the UK nations and greater than the UK average decline of 5.2%. Since 2010, the average amount of daily TV viewing has decreased by 26%.

Figure 2: Average daily minutes viewed per person, by nation: 2010-2018

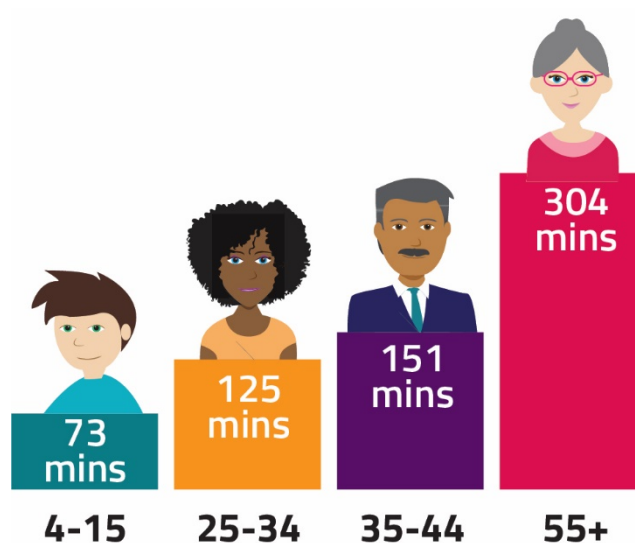


Source: BARB. BBC areas, all individuals (4+).

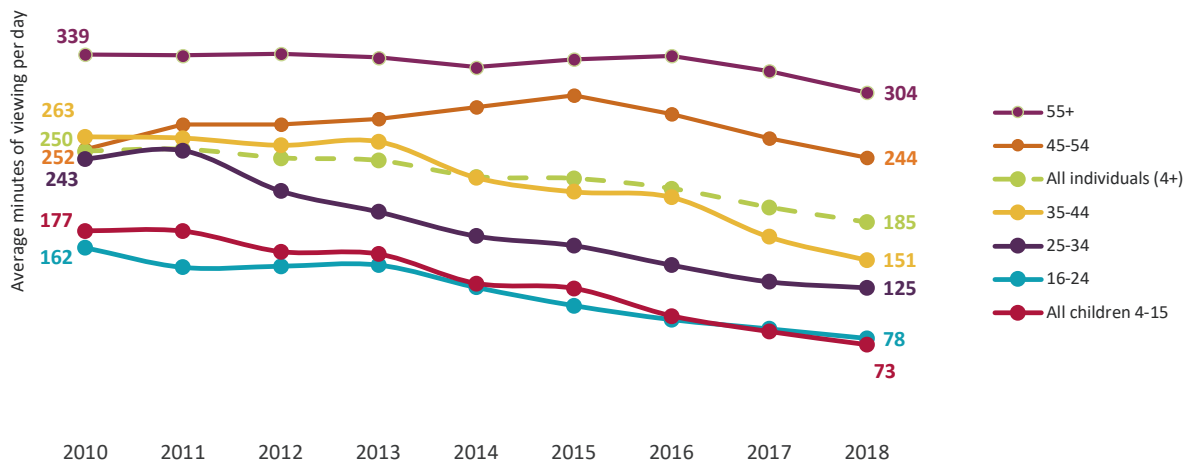
## Over-54s watch four times more TV than children

As in the rest of the UK, older age groups watch the most broadcast TV in Northern Ireland (those aged 55+ watch 5 hours 4 minutes on average a day) and children the least (1 hour 13 minutes).

Children’s viewing decreased by the highest percentage of all the age groups, compared to 2017 (14%). But 35-44 year olds and over-54s, although they had smaller percentage decreases, declined by the greatest number of minutes (21 and 20 minutes respectively).



**Figure 3: Average daily minutes viewed per person, by age, in Northern Ireland**



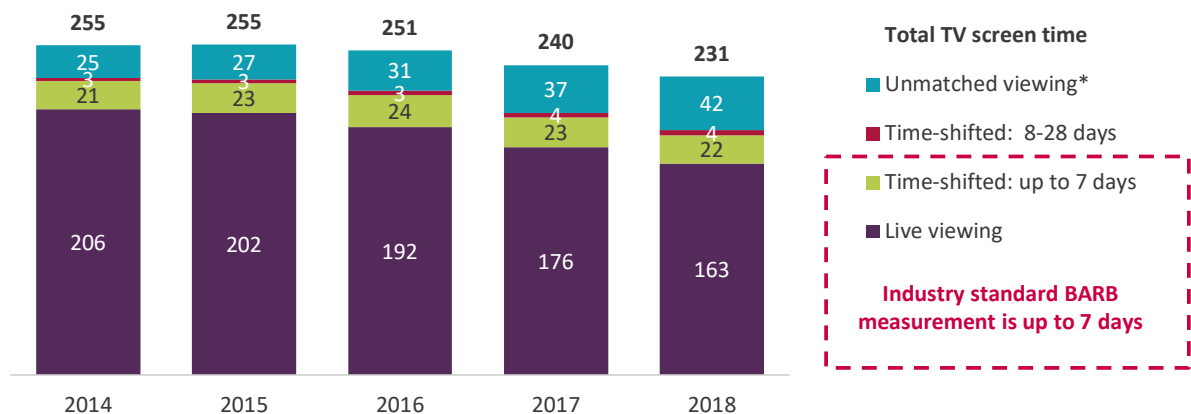
Source: BARB. BBC Ulster area, all individuals (4+).

## 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 the time spent watching other things on their TV set has increased. Viewing of non-broadcast services on the TV set (such as streaming services like Netflix and Amazon Prime Video, or gaming) increased by five minutes a day to an average of 42 minutes per person per day in 2018.

But this increase was not enough to offset the declines in broadcast TV; overall TV screen time in Northern Ireland decreased by nine minutes.

**Figure 4: Average daily minutes of TV screen time per person in Northern Ireland**



Source: BARB. BBC Ulster area, 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.



## What is public service broadcasting?

Public service broadcasting (PSB) is 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 2018, the main five PSB channels (BBC One, BBC Two, UTV, Channel 4 and Channel 5) accounted for a combined 52.3% share of total TV viewing in Northern Ireland. This was above the England average but below Wales and Scotland, where the main five PSBs have a higher audience share. The PSB share in Northern Ireland increased compared to 2017, when the main five PSBs achieved a share of 50.9%. For context, there are more than 270 BARB-reported channels in the UK, 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 and Channel 4's viewing shares were higher in Northern Ireland than across the other nations.

**Figure 5: Percentage share of total TV viewing in the nations of the UK for the five main PSB channels: 2018**



Source: BARB. BBC areas, all individuals (4+). Channels include HD variants but exclude +1 channels.

## A new future for public service broadcasting

In June 2019, Ofcom announced a range of measures to ensure that public service broadcasters (PSBs) continue to deliver high-quality content for UK viewers and listeners.

PSB has been a powerful cultural force for more than 80 years, and remains central to innovation and investment in broadcasting, helping to underpin the UK's wider creative economy.

But public service broadcasting is now at a crucial juncture, as broadcasters face competition from global on-demand and internet services such as Netflix, Amazon Prime Video and YouTube.

So Ofcom has set out a package of measures, including recommendations to government, to support PSB now and in the years ahead. These include:

- updating rules to ensure that traditional PSB TV channels are [prominent and easy to find](#) within programme guides;
- making recommendations to government for new legislation to help ensure that PSB programmes and players are also [clearly visible on internet-connected devices](#), such as smart TVs, set-top boxes and streaming sticks;
- endorsing a range of commitments by ITV, Channel 4 and Channel 5 to increase their focus on [high-quality children's programmes](#); and
- launching **Small Screen: Big Debate** – a national forum to discuss the future of public service broadcasting on TV and online. This will call for Parliament, regulators, broadcasters and viewers to be involved in developing a [new framework for public service media](#) in future.

## **Derry Girls was the most-watched programme in Northern Ireland in 2018**

The second episode of the first series of *Derry Girls* on Channel 4 was the most watched broadcast programme on TV sets in Northern Ireland in 2018. This episode achieved an average audience of 608,000 and a share of 70% of those watching TV at that time.

This is much higher than the top programme of 2017 which was the opening episode of *It's a Sin* (409k individuals watching on average, 53% share of viewing). 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.

**Figure 6: Top 20 most-watched programmes in Northern Ireland: 2018**

Rank	Programme Title	Channel	Date	Average 000s	% TVR	% Share
1	Derry Girls	Channel 4	11/01/2018	608	35.3	69.5
2	I'm A Celebrity - Get Me Out Of Here!	UTV	18/11/2018	481	27.7	61.7
3	World Cup 2018: Cro V Eng	UTV	11/07/2018	463	26.8	63.7
4	Coronation Street	UTV	30/03/2018	365	21.2	50.3
5	World Cup 2018: Tun V Eng	BBC One Northern Ireland	18/06/2018	350	20.2	55.5
6	World Cup 2018: Col V Eng	UTV	03/07/2018	340	19.7	59.7
7	Mrs Brown's Boys Christmas Special	BBC One Northern Ireland	25/12/2018	329	19.0	46.6
8	Bodyguard	BBC One Northern Ireland	23/09/2018	325	18.8	44.1
9	UTV Live News	UTV	01/03/2018	323	18.7	44.0
10	Strictly Come Dancing	BBC One Northern Ireland	27/10/2018	323	18.6	49.7
11	Strictly Come Dancing: The Final	BBC One Northern Ireland	15/12/2018	322	18.6	49.9
12	World Cup 2018: Swe V Eng	BBC One Northern Ireland	07/07/2018	319	18.4	78.7
13	Emmerdale	UTV	09/01/2018	307	17.8	42.4
14	Ant & Dec's Saturday Night Takeaway	UTV	03/03/2018	305	17.7	45.6
15	Utv Weather	UTV	01/03/2018	304	17.6	41.3
16	Mrs Brown's Boys	BBC One Northern Ireland	01/01/2018	302	17.5	43.3
17	New Year's Eve Fireworks	BBC One Northern Ireland	31/12/2018	297	17.1	53.0
18	Newsline	BBC One Northern Ireland	01/03/2018	286	16.6	40.0
19	World Cup 2018: Fra V Bel	BBC One Northern Ireland	10/07/2018	284	16.4	47.5
20	My Dad, The Peace Deal And Me	BBC One Northern Ireland	04/04/2018	279	16.2	33.1

Source: BARB. BBC Ulster area, 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 1% of a target audience.

### **Derry Girls commissioned for a third series**

In 2019, the six-part series of *Derry Girls* had an average audience of 2.6 million individuals on Channel 4 across the UK.<sup>13</sup> The continued ratings success of *Derry Girls* has prompted Channel 4 to commission a third series of the TV comedy. It will air on Channel 4 in 2020.

*Derry Girls* is a commission for Hat Trick Productions and is entirely set and made in Northern Ireland. The production receives funding from Northern Ireland Screen.

Series one of the show has also been made available to a worldwide audience through streaming platform Netflix.

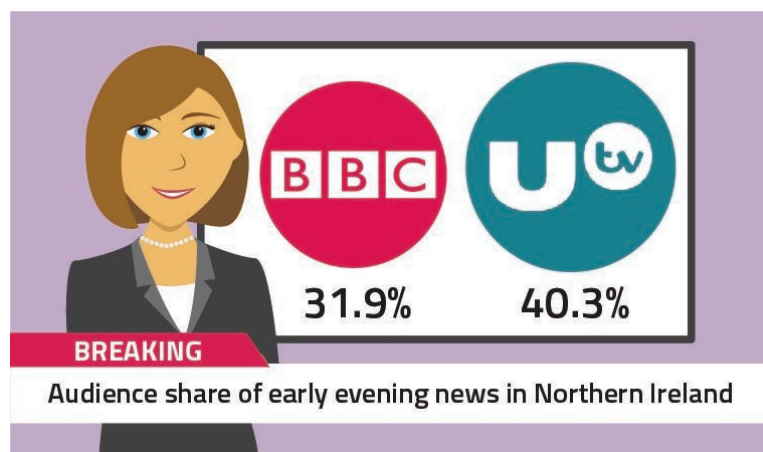
### **UTV's early evening news bulletin attracts a greater share in Northern Ireland than the UK Channel 3 average for the same slot**

In 2018, UTV's early-evening news bulletin, *UTV Live*, attracted a 40.3% average share of viewing in Northern Ireland between 6pm and 6.30pm, just under double the Channel 3 UK average for the early-evening news bulletin slot (22.9%).

<sup>13</sup> BARB. Network, all individuals (4+). Includes viewing to Channel 4 HD and Channel 4 +1.

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 (31.9%) although this was greater than its share in 2017 (30.7%). This is slightly higher than the UK average for the BBC early evening news bulletin (29.2%).<sup>14</sup>

**Figure 7: Audience share % of BBC One and UTV early evening news: 2018**



*Source: BARB. All individuals (4+). Note: Early evening ('local') news bulletin figures based on 'regional news' BARB genre programmes, start time 17:55-18:35, 10mins+ duration, weekdays and include the +1 channel where applicable. BBC One's early evening news bulletin, BBC Newsline, is transmitted between 18:30-19:00 and based on BBC areas. UTV Live is transmitted between 18:00-18:30 and is based on ITV areas.*

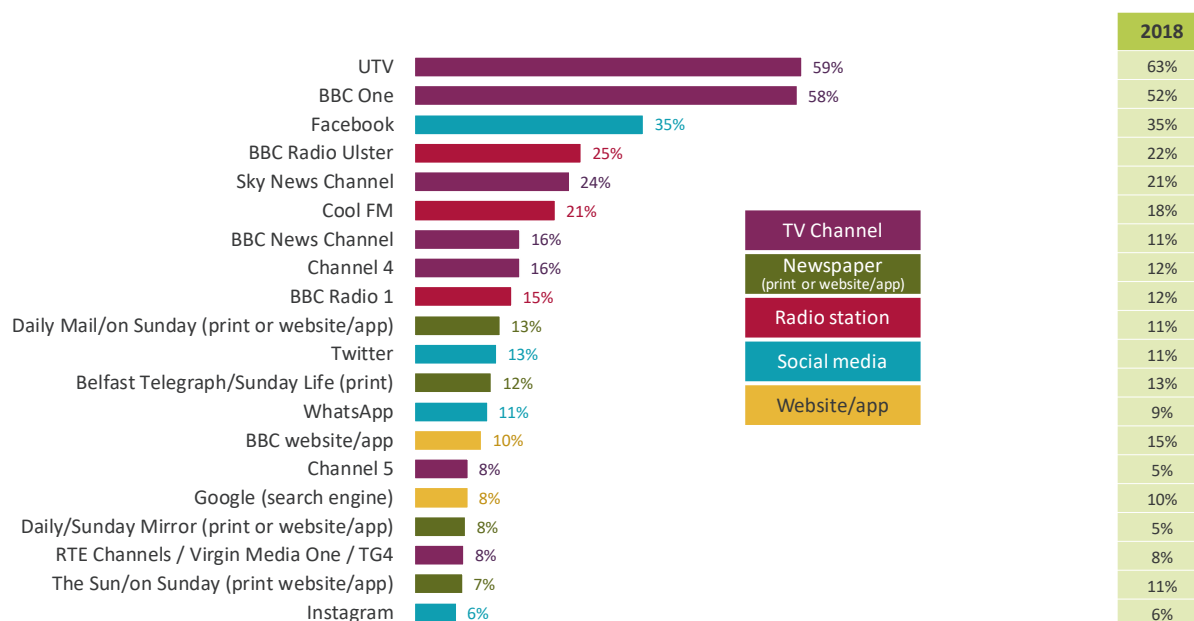
## **UTV and BBC One are the most-used sources of news for people in Northern Ireland**

Television remains the most-used platform for news consumption for people in Northern Ireland, and UTV and BBC One are the most-used news sources overall. Television channels, which includes Sky News, the BBC News Channel and Channel 4, make up five of the top ten most-used news sources in 2019.

Social media sites are also highly used in Northern Ireland, with over a third (35%) of people saying they use Facebook for news 'nowadays', while Twitter, WhatsApp and Instagram also appear in the top 20 most-used news sources. BBC Radio Ulster and Cool FM are also well-used sources of news for people in Northern Ireland.

<sup>14</sup> Source: BARB. Individuals (4+). UK averages based on share to respective early evening news bulletin time slots.

Figure 8: Top 20 sources of news in general in Northern Ireland: 2019



Source: Ofcom News Consumption survey 2019.

Question: Thinking specifically about <platform>, which of the following do you use for news nowadays? Base: All adults 16+ in Northern Ireland – 2019=420.

## UTV is the most-used source of news for people in Northern Ireland looking for news about their own nation

For news about their own nation, television and radio are popular with people in Northern Ireland. While UTV and BBC One are the most-used sources for news about the nation, BBC Radio Ulster and Cool FM both rank among the top five most-used sources for this type of news. Facebook is the third most-used source, with a quarter of adults (25%) saying they use the social media platform to get news about their nation.

Figure 9: Sources used to access news about own nation: 2019

England		Scotland		Wales		Northern Ireland	
BBC One	39% ▼	STV	44%	BBC One	44% ▼	UTV	52%
ITV	22%	BBC One	39% ▼	ITV WALES	35%	BBC One	50% ▲
Facebook	15% ▲	Facebook	19%	Facebook	25% ▲	Facebook	25%
BBC website/app	8%	BBC website/app	7%	South Wales Echo	12% ▲	BBC Radio Ulster	20% ▲
BBC News Channel	5%	Twitter	6%	The Western Mail	6%	Cool FM	15%
Twitter	4%	BBC Radio Scotland	6%	BBC website/app	5%	The Belfast Telegraph	5%
BBC local/regional radio station	4% ▼	The Sun	6%	Any Wales based news site/app	5%	Twitter	5%
Google (search engine)	4%	The Daily Record	5% ▼	Local daily newspaper	5%	RTE Channels / TV3 / TG4	5%
		Local commercial radio station	4%			BBC Radio 1	5%
		Google (search engine)	4%			Local commercial radio station	4%
Don't follow Nation news	12%	Don't follow Nation news	4%	Don't follow Nation news	7%	The Irish News	4%
						Sunday Life	4% ▲
						Don't follow Nation news	2%

Source: Ofcom news consumption survey 2019.

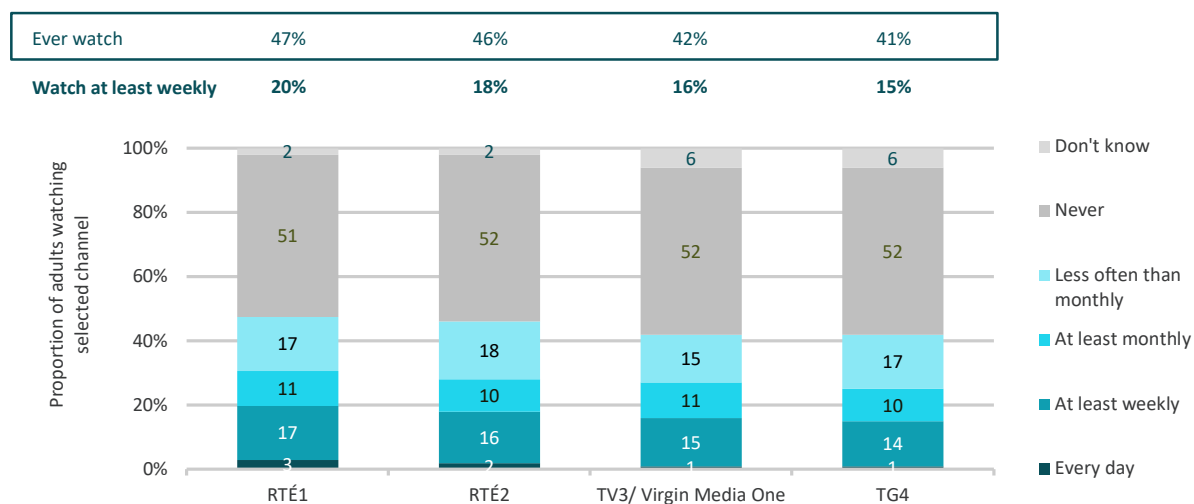


Question: From which of the following sources do you get news about what is going on in your NATION nowadays? Base: All adults 16+ using TV/Newspapers/Radio/Internet/Magazine for news. Northern Ireland =385. Green/red triangles indicate statistically significant differences between 2019 and 2018.

## RTÉ channels are watched by nearly one in five people in Northern Ireland every week

Up to a fifth of adults in Northern Ireland with a TV in their home claim to watch one of the Irish channels at least weekly. Each had comparable viewing among our respondents: RTÉ One (20%), RTÉ2 (18%), TV3/Virgin Media One (16%) and TG4 (15%).

Figure 10: Claimed viewing of ROI-originated TV channels in Northern Ireland



Source: Ofcom Technology Tracker 2019.

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

Base: All adults aged 16+ in Northern Ireland with a TV in household (n = 482).

## How people watch 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 available to about three-quarters of the population, using the same aerial viewers use 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, Virgin Media One, Two and Three as well as 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.

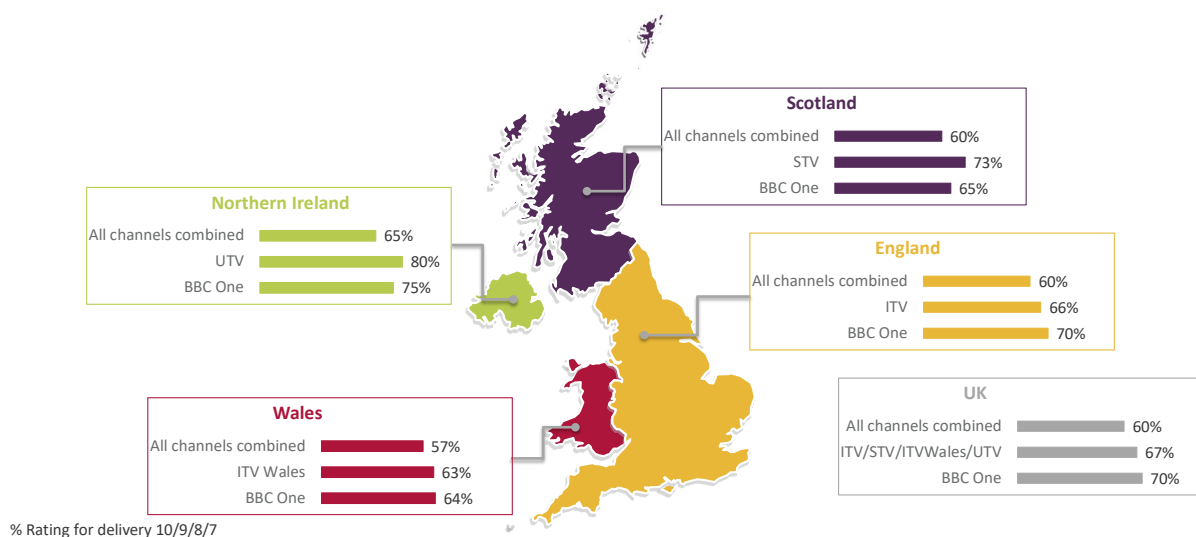
In cases where RTÉ does not have the rights to broadcast certain programmes in the UK, for example some sports events, these programmes may be blocked when viewed via Freeview, Sky or Virgin Media.

## How viewers in Northern Ireland rate PSB services

More than three-quarters of PSB viewers in Northern Ireland were satisfied with PSB provision in 2018 (77%). This compares with 74% for the UK average, 74% in England, 74% in Wales and 73% in Scotland.<sup>15</sup>

In terms of regional news provision, audiences in Northern Ireland rated UTV (80%) higher than BBC One (75%). Both of these ratings were the highest compared to the other nations, which suggests that audiences in Northern Ireland are more satisfied with regional news delivery.<sup>16</sup>

**Figure 11: Provision of high-quality regional news within nation, by provider (7-10 rating)**



Source: Ofcom PSB tracker 2018. Q16 - Extent to which the channel is rated as 7-10 out of 10 in relation to the following statement - Its regional news programmes provide a wide range of good quality news about my area  
 Base for individual channels: Self-reported viewers of each in each nation (BBC One = 2069, 1411, 211, 230, 187; ITV1 = 1776, 1211, 192, 188, 185). Base for 'All channels combined': All respondents who ever watch any PSB channels in each nation (2780, 1944, 274, 283, 279).

PSB services were rated marginally lower by viewers in Northern Ireland (51%) compared to the other nations (England (55%), Scotland (55%) and Wales (52%)) for the delivery of 'showing different parts of the UK, including England, Northern Ireland, Scotland and Wales'.<sup>17</sup>

<sup>15</sup> Ofcom cross-platform media tracker 2018

<sup>16</sup> Ofcom cross-platform media tracker 2018

<sup>17</sup> Ofcom cross-platform media tracker 2018

Under half of audiences in Northern Ireland (44%) rated highly the performance delivery of 'It portrays my region/nation fairly to the rest of the UK'. This was rated relatively low across all the nations: England (47%), Scotland (45%) and Wales (43%).<sup>18</sup>

In terms of representing diversity in the nations, 51% of audiences in Northern Ireland rated highly the delivery of 'programmes that show different kinds of cultures within the UK'. This was the lowest compared to 57% in England, 58% in Scotland and 56% in Wales.<sup>19</sup>

## 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.

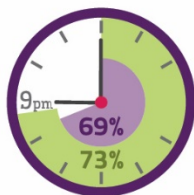
Viewers in Northern Ireland are more likely than other nations and across the UK overall to say there is too much sex on television; about three in ten (28%) say this, compared to 23% in the UK overall<sup>20</sup>, while they are less likely to say this about swearing on TV (25% compared to 33% across the UK overall). There is no difference in their feelings about violence on TV; about a third say this in Northern Ireland and across the UK overall.<sup>21</sup>

A fifth of television audiences in Northern Ireland (21%) feel that TV has got worse in the last year; The reasons given for saying this are: general lack of quality (67%), lack of variety (64%), and more repeats (62%).<sup>22</sup>

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



Television has too much...



The watershed...

69% of adults are aware of the 9pm watershed

73% of adults believe that 9pm is a suitable time for the watershed.

21% of adults thought the quality of TV got worse in the last year. Top reasons why:

Lack of quality	67%
Lack of variety	64%
More repeats	62%
Too many reality shows	35%
More sex	16%
More antisocial behaviour	7%
More offensive language	5%
More violence	5%

17% of adults thought the quality of TV got better in the last year. Top reasons why:

Wider range/type of programmes	73%
More interesting/entertaining	56%
Improved quality	56%
More/better dramas	39%
More up to date	22%

Source: Ofcom cross-platform media tracker 2018. Base: All with any TV sets in 2018; UK (2321), Northern Ireland (228)

<sup>18</sup> Ofcom cross-platform media tracker 2018

<sup>19</sup> Ofcom cross-platform media tracker 2018

<sup>20</sup> Ofcom cross-platform media tracker 2018. Note: these differences are not significant

<sup>21</sup> Ofcom cross-platform media tracker 2018

<sup>22</sup> Ofcom cross-platform media tracker 2018. Note these are based on 50 respondents in NI who say TV programmes have got worse in the last year



# TV programming for and from Northern Ireland

## Introduction

The BBC and UTV provide programming specifically for viewers in Northern Ireland across a range of genres, but most notably news and current affairs output.

Spend on programming for Northern Ireland by the BBC and UTV combined decreased by 6% in real terms in 2018 to £27.4m. Of this, £10.6m was spent on news, the lowest level of news spend over the past 12 years for Northern Ireland.

In 2018, BBC hours of first-run content for Northern Ireland fell by 6% to 561 hours. This is the lowest level of transmission hours recorded for the BBC in Northern Ireland since 2006. In 2018, UTV's local content increased by 5% from the previous year to 358 hours, the highest level in ten years.

Northern Ireland is also an important source of production for PSB content shown across the UK. Just over 1% of qualifying network content across the PSB channels were Northern Ireland-based productions in 2018. The percentage of network content hours produced in Northern Ireland by the BBC, Channel 4, ITV and Channel 5 individually all rose in 2018.

## How we report spend on programming

The analysis in this section covers programming made in Northern Ireland for viewers in Northern Ireland as well as programming made in the nation and broadcast UK-wide. It 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.

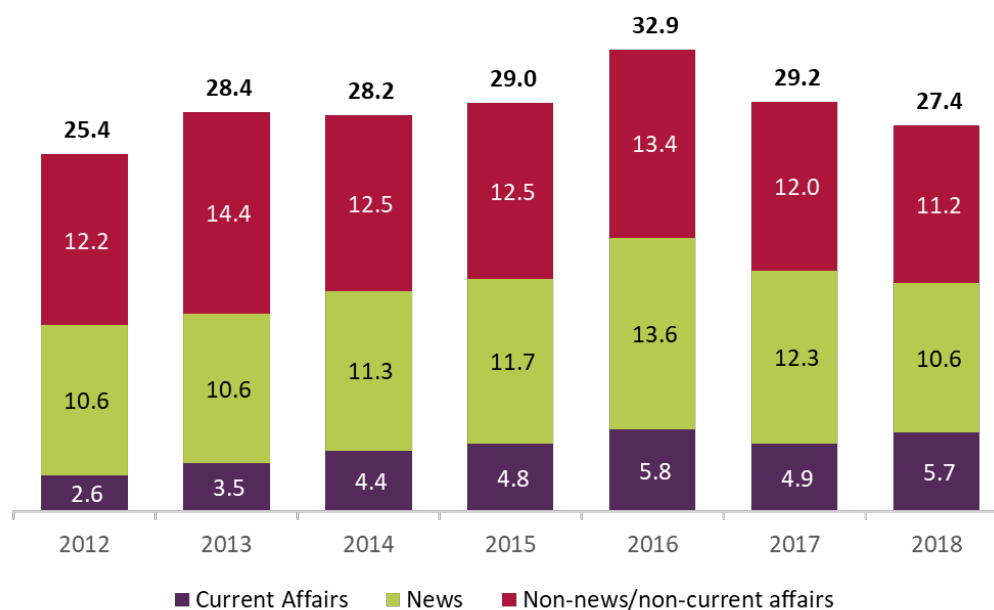
Spend on this content includes all costs incurred by the broadcaster associated with making programmes. These include both direct and indirect production costs for in-house productions and licensing costs for commissioned programmes, but exclude costs related to marketing and distribution. All spend figures are in **real terms**, which mean they are adjusted for inflation using the consumer price index (CPI) and are listed in 2018 terms.

## PSB combined spend on programming for Northern Ireland decreased by 6% in 2018, led by a decline in news spend

Of the £27.4m spend in 2018, £10.6m was spent on news; the lowest level, in real terms, of news spend over the past 12 years for Northern Ireland. Some £5.7m was spent on current affairs content.

Most spending on programmes for viewers in Northern Ireland was on other programming, including general entertainment, though this too was down on a year earlier, by 6.7%, to £11.2m.

Figure 12: PSB spend on first-run UK-originated content for Northern Ireland, by genre (£m)



Source: Ofcom/broadcasters. Note: Figures are expressed in 2018 prices. Comparisons of UTV spend with years before 2016 should be made with caution. Before ITV's takeover of UTV in 2016, UTV did not charge staff costs to its news programmes, allocating direct costs only. Since 2016, ITV has allocated relevant staff costs to UTV news programming, consistent with its approach across the rest of the ITV network.

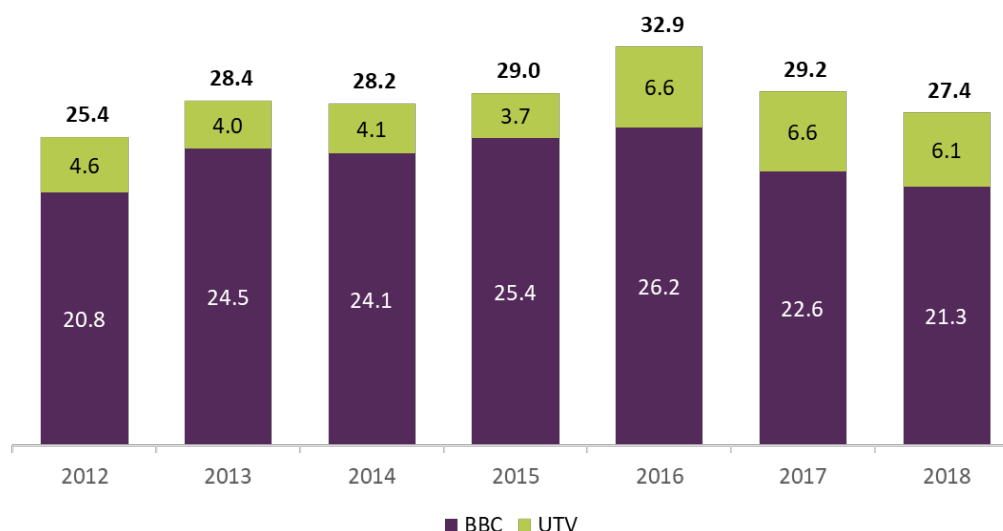
## Spend by both BBC and UTV was down on local programming in 2018

Spend on first-run content by the BBC declined by 6% in real terms and spend by UTV fell by 7.5% in 2018, compared with the previous year.

In monetary terms, BBC is driving the decline in spend for first-run content in Northern Ireland, with its spend down by more than £1m. In 2018, BBC spend was £21.3m, which is the lowest level since 2012.



**Figure 13: BBC and UTV spend on non-network first-run UK-originated content for Northern Ireland (£m)**



Source: Ofcom/broadcasters. Note: Figures are expressed in 2018 prices. Comparisons of UTV spend with years before 2016 should be made with caution. Before ITV’s takeover of UTV in 2016, UTV did not charge staff costs to its news programmes, allocating direct costs only. Since 2016, ITV has allocated relevant staff costs to UTV news programming, consistent with its approach across the rest of the ITV network.

## Local programming requirements

Both **UTV** and the **BBC** are required to produce programming for viewers in Northern Ireland.

Under the terms of its licence, which was renewed on 1 January 2015 for ten years, UTV has to deliver a minimum amount of programming which is “of particular interest” to people living in Northern Ireland. This is done through quotas for news and non-news/current affairs programmes.

These quotas require UTV to produce 4 hours of news and 2 hours per week of non-news programming, of which 33 minutes must be current affairs.

The BBC, through the operating licence, which came into effect on 1 January 2018, must also fulfil regulatory conditions specific to Northern Ireland.

Among other things, this operating licence stipulates that in each Financial Year the BBC must ensure that:

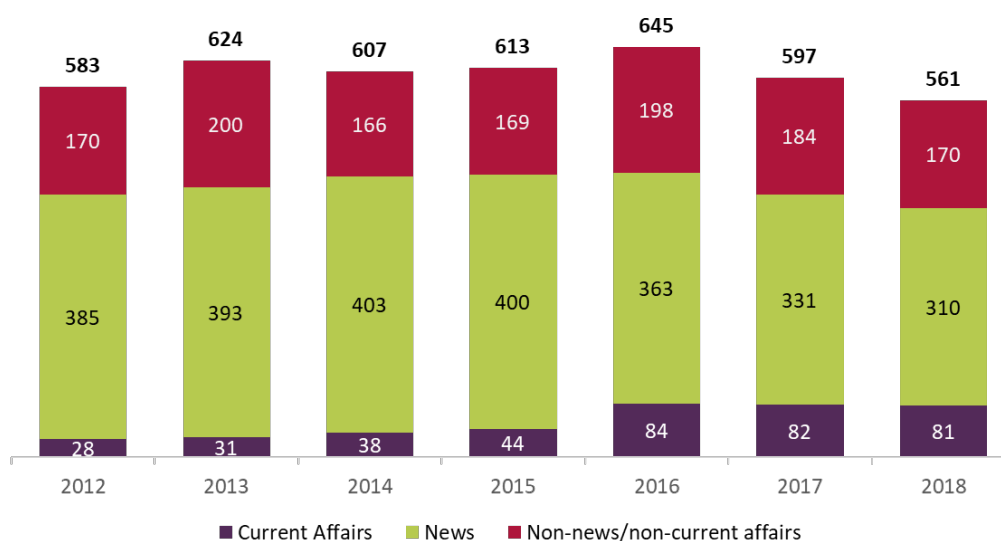
- in respect of **BBC One Northern Ireland**, that at least 310 hours are allocated to news and current affairs programmes; and at least 90 hours are allocated to non-news programmes;
- in respect of **BBC Two Northern Ireland**, at least 60 hours are allocated to non-news programmes; and
- in respect of **BBC One Northern Ireland** and **BBC Two Northern Ireland** taken together, the BBC must ensure that it provides a range of genres in its programming that reflects Northern Ireland’s culture.

## In 2018, BBC hours of first-run content for Northern Ireland fell by 6% to 561 hours

This is the lowest level of transmission hours recorded for the BBC in Northern Ireland since 2006.

Current affairs content output has remained steady at 81 hours, consistent with 2017 (82 hours) and 2016 (84 hours). News and other genre programming were key drivers in the decline in hours, with news content having dropped by 21 hours in 2018, a 6% decline; the other genres dropped by 14 hours, a 7% decline.

Figure 14: BBC hours of first-run UK-originated content for Northern Ireland, by genre



Source: Ofcom/broadcasters.

### BBC NI pitches up for local sport

BBC Northern Ireland has signed a three-year deal to show live Danske Bank Premiership and Tennent's Cup football matches until 2021.

As part of the deal, the BBC will show ten Premiership games live over the season along with the two Irish Cup fixtures. These matches are in addition to the Irish Cup Final, which BBC Sport NI has already broadcast live.

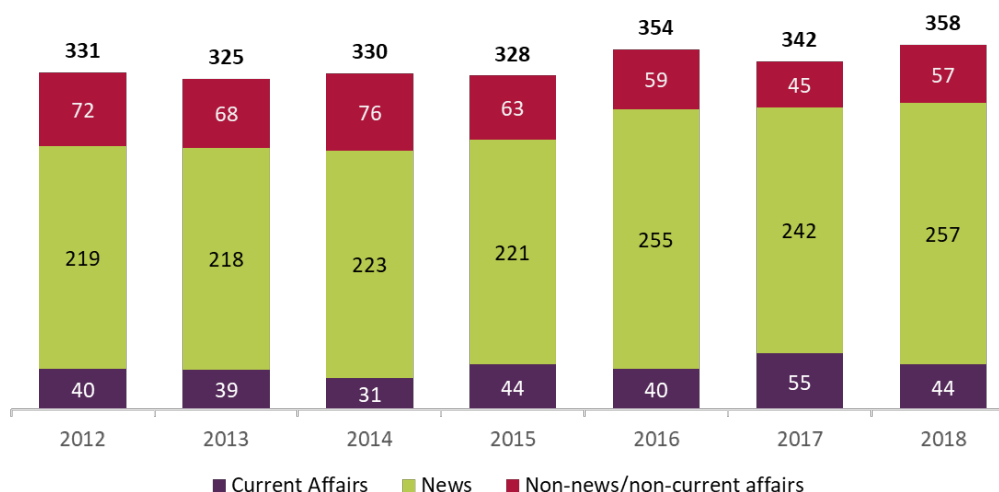
BBC Northern Ireland also expanded its GAA coverage this year, screening two additional Ulster Championship matches. Five out of the eight Ulster championship matches were broadcast live in 2019.

The Corporation has also extended its deal to broadcast the North West 200 motorcycle races for a further five years. The new deal runs from 2020 until 2025 and includes coverage across TV, radio and digital services.

## Hours of first-run UK-originated UTV content for Northern Ireland rose to its highest level in ten years in 2018

At 358 hours, this is a 5% increase on UTV's 2017 hours. In contrast to the BBC, news and other genre programming are driving the increase. There were an additional 15 hours of news in 2018, up by 6%, and other genres increased by 12 hours, a 26% increase on 2017.

Figure 15: UTV hours of first-run UK-originated content for Northern Ireland, by genre



Source: Ofcom/broadcasters.

### UTV archive to be stored at PRONI

Archive TV footage, including George Best taking his driving test, and a nine-year-old Rory McIlroy hitting golf balls into a washing machine, will be stored at the Public Record Office of Northern Ireland (PRONI) and will be available for viewing as part of a deal with UTV.

The move to protect the UTV catalogue is being funded by the Department for Communities through PRONI and will include an ongoing digitisation process. Michael Willis, director at PRONI, said: "The UTV archive is one the most significant additions to PRONI's collections in many years, encapsulating as it does the history of Northern Ireland during the latter part of the 20th century.

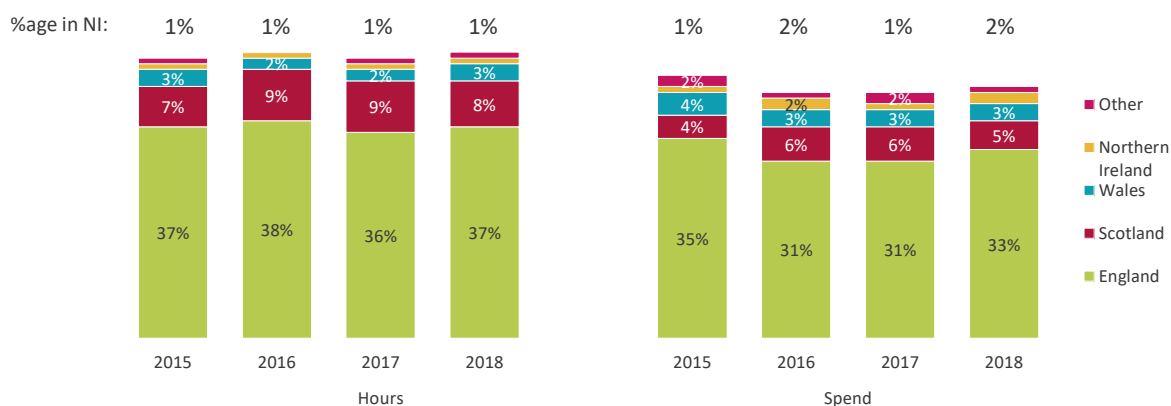
"Preserving the archive is paramount to protect our rich and diverse culture and to enable future generations to see how events large and small have helped shape who we are today."

### Just over 1% of qualifying network content across the PSB channels were Northern Ireland-based productions in 2018

Public service broadcasters have to make programmes that are broadcast for the first time on their network TV channels, in a range of places around the UK that are not London. The broadcasters have quotas relating to this, in terms of the proportion of qualifying hours that must be made outside

London, and the proportion of qualifying spend that has to be outside London. The BBC has individual quotas for each of the UK nations, which came into effect this year, and Channel 4 also has an out-of-England quota<sup>23</sup>.

**Figure 16: Proportion of qualifying network hours and spend outside London, all PSBs combined: 2015-2018**



Source: Ofcom / broadcasters.

## A greater proportion of qualifying network content was made in Northern Ireland in 2018 than in previous years

This was driven by the BBC; Northern Ireland has been home to the BBC drama series *The Fall* and *Line of Duty*, and it continued hosting BBC drama production in 2018. *Death and Nightingales* and *The Woman in White* qualified as Northern Ireland productions.

The proportion of network content qualifying as Northern Ireland will also have been given a boost by the BBC's *Sunday Morning Live* now being made in the region, a show which was previously assigned to England.

**Figure 17: Proportion of qualifying network production in Northern Ireland, by PSB: 2015-2018**

		2015	2016	2017	2018
BBC	Spend (%)	1.8	3.1	2.4	3.1
	Hours(%)	1.8	2.1	1.9	2.4
ITV	Spend (%)	0.4	0	0	0.3
	Hours(%)	0.1	0	0	0.1
Channel 4	Spend (%)	0.3	0.5	0.5	1.1
	Hours(%)	0.3	0.5	0.7	1.1
Channel 5	Spend (%)	0	0.9	0.2	0.4
	Hours(%)	0	0.3	0.1	0.2

Source: Ofcom / broadcasters. Figures do not include network news.

<sup>23</sup> For further information, see the [PSB compliance pack](#) and the [regional programming guidance](#)

## Mastermind comes to Northern Ireland

Long-running TV quiz show Mastermind is to be made in Northern Ireland. A joint bid from independent producers Hat Trick and Hindsight won the tender to produce it and Celebrity Mastermind.

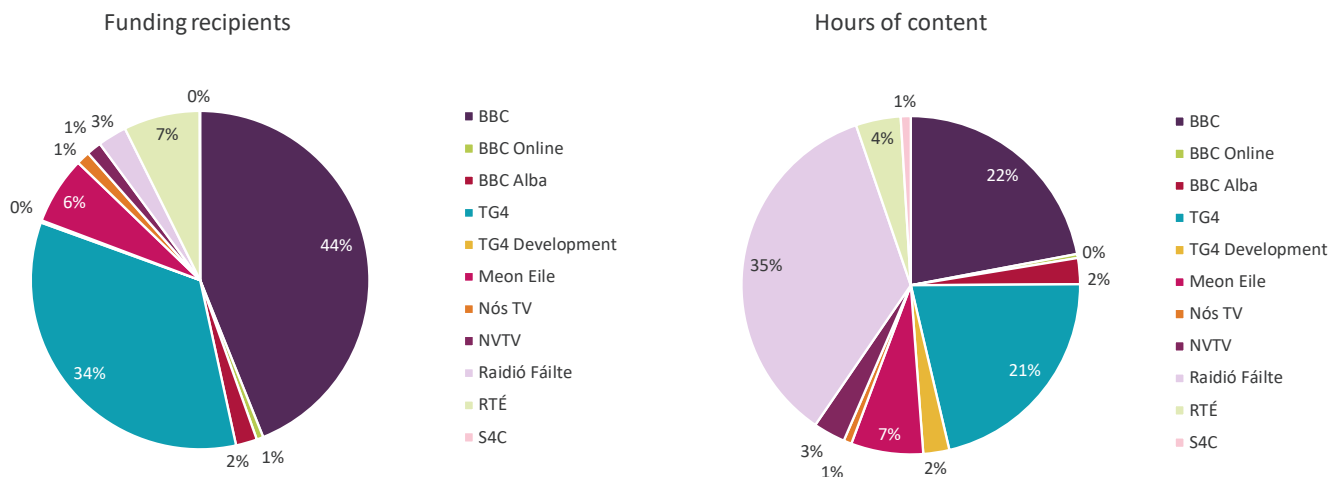
The contract runs for two years from July 2019 and will see the production move from Salford, where it has been made by BBC Studios, to Belfast.

## The Irish Language Broadcast Fund provided £2.7m in funding in 2018/2019

Managed by Northern Ireland Screen, the Irish Language Broadcast fund (ILBF) continued to fund a broad range of Irish-language content in 2018/19, the bulk of which will be broadcast on TG4 and BBC Northern Ireland. ILBF-funded content covers a range of genres, including children's programming, drama and documentaries.

Recent programming highlights include *Rocky Ros Muc*, a winner at the Celtic Media Festival in 2018 and the first Irish-language feature documentary to be considered for an Oscar, and animation *An Béal Bocht*, also a winner at the Celtic Media Festival, the Galway Film Fleadh and the Foyle Film Festival.

Figure 18: ILBF funding recipients / hours: 2018-2019



Source: Northern Ireland Screen.

Note: funding hours relate to financial commitments made during the financial year, but, which may not have been broadcast in the same financial year.

## The Ulster-Scots Broadcast Fund provided £0.9m in 2018-19

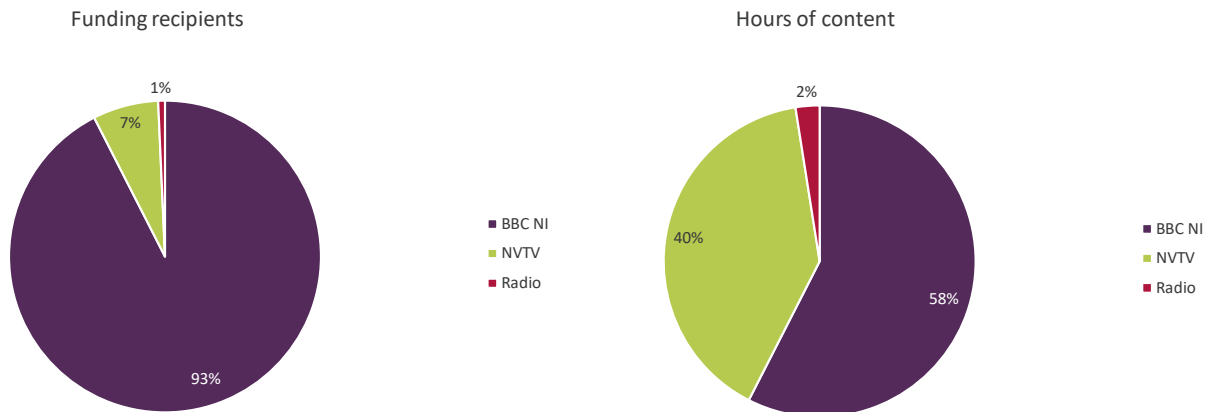
Eighteen projects received committed funding from the Ulster-Scots Broadcast Fund (USBF) in 2018-19. Of this funding, 93.2% of funding went to programming across the BBC, whether through BBC



Northern Ireland (92.5%) or BBC Radio Ulster (0.7%). The remaining 6.8% went towards content for local TV station NVTV.

USBF-funded content over the period ranged from factual entertainment programming and documentaries to music content. Highlights include *Burns by The Lagan*, a factual TV programme accompanied by a 30-minute radio companion piece celebrating Burns Night, and *The People's Painter*, an observational format in which six amateur artists are challenged to interpret modern-day Northern Ireland on canvas, guided and inspired by the work of Ulster-Scots painter William Conor.

**Figure 19: USBF funding recipients / hours: 2018-2019**



Source: Northern Ireland Screen.

Note: funding hours relate to financial commitments made during the financial year, but which may not have been broadcast in the same financial year.



# Radio and audio

## Introduction

Radio remains popular across the UK and especially in Northern Ireland, where adults are more likely to listen to radio, than in any other nation, with more than nine in ten tuning in each week.

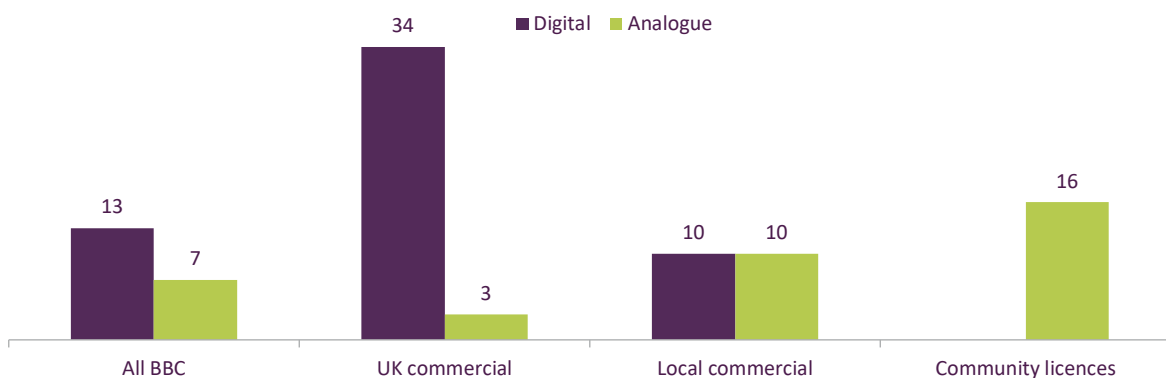
Listeners can choose from more stations than ever before, but despite this, local radio continues to hit the right note. Local stations - Cool FM, Downtown, U105, the Q Network, Downtown Country and BBC Radio Ulster/Foyle - account for 60% of listening in Northern Ireland, far higher than their counterpart stations in Scotland and Wales.

And while digital listening remains low compared to other nations, it grew by 10% over the past year, the fastest rate of growth in the UK. Meanwhile, ownership of smart speakers, with uses including streaming music and listening to live radio, has increased to just over a fifth (22%) of households.

## There were 57 radio services broadcasting on DAB in Northern Ireland in March 2019

This compares with fewer than 40 five years ago. The number of community radio stations on air in Northern Ireland – broadcasting on FM only – has increased to 16.

Figure 20: Radio station availability in Northern Ireland



Source: BBC / Ofcom, March 2019.

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 local DAB multiplex in Northern Ireland. Not all services will contain local content, and some services may be broadcast on a number of different multiplexes (but are still counted for these purposes as individual services).

## New broadcasting hub for Raidió Fáilte

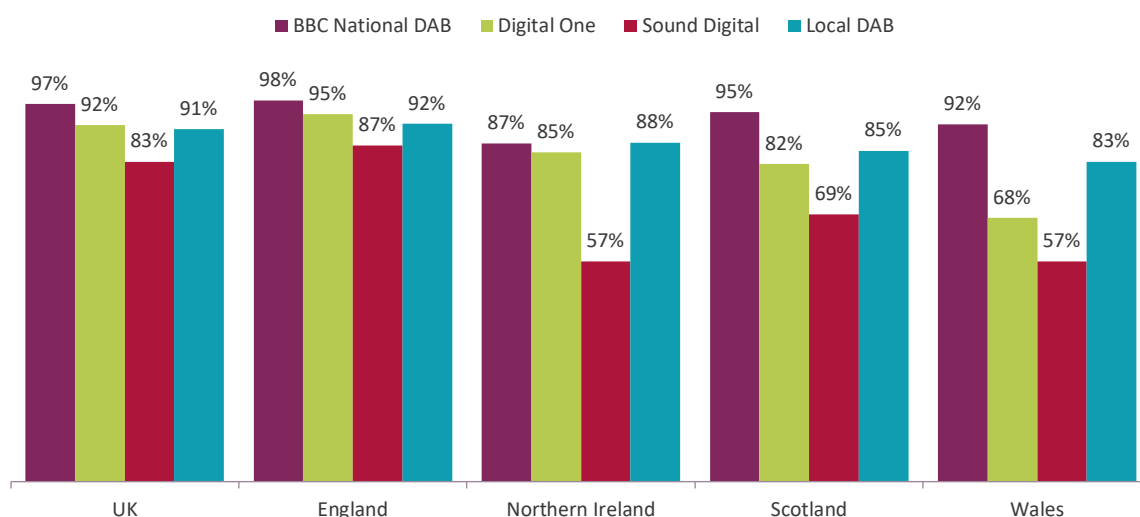
Irish Language community radio station Raidió Fáilte moved into a new broadcast and cultural hub at the end of 2018. The £1.8m facility on a 'gateway' site between Belfast city centre and the west of the city has new studio and administration spaces, as well as recording studios for bands and musicians. Raidió Fáilte was named station of the year at the 2019 Community Radio Awards.

## National BBC services on DAB are available to 87% of households in Northern Ireland

The three main radio multiplexes, the transmission infrastructure used to broadcast DAB radio stations, cover between 85% and 88% of households in Northern Ireland. The coverage of the Sound Digital multiplex, which launched in 2016, extends to 57% of households, mostly in the east of Northern Ireland. DAB coverage is unchanged since last year.

Figure 21: Household coverage of DAB

Proportion of households (%)

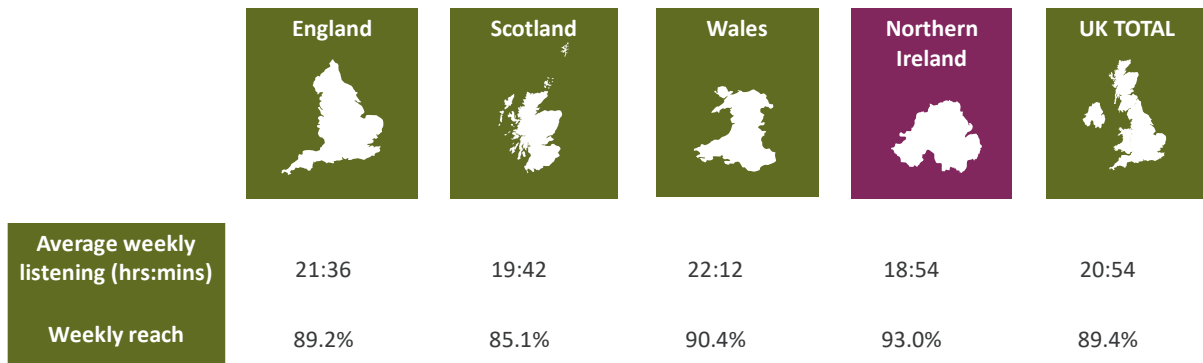


Source: BBC, Arqiva, Ofcom, March 2019.

## More than 90% of Northern Ireland adults listened to radio each week in Q1 2019

However, at an average of 18 hours 54 minutes a week, they tuned in for less time than listeners in the other nations. More people in Northern Ireland listen to commercial radio (67%) than to BBC radio (60%).

**Figure 22: Average weekly reach and listening hours**



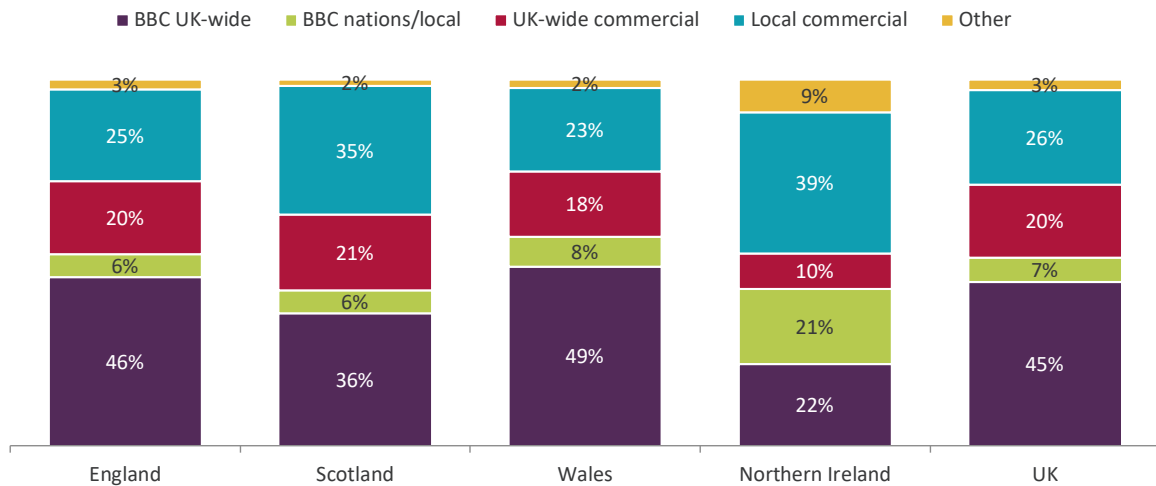
Source: RAJAR, All adults (15+), Q1 2019.

England = BBC Local radio in England TSA; Scotland = BBC Radio Scotland TSA; Wales = BBC Radio Wales TSA; Northern Ireland = BBC Radio Ulster TSA. Reach is defined as a percentage of the area’s adult population who listen to a station for at least 5 minutes in an average week.

## Local commercial radio made up nearly 40% of all radio listening in Northern Ireland in Q1 2019

Local radio continued to make up most of all radio listening hours in Northern Ireland in 2019. At 60%, this was significantly higher than the UK average (33%), Scotland (41%) and Wales (31%). Local commercial stations had a listening share of 39% while the BBC’s local services for Northern Ireland - BBC Radio Ulster and Foyle - commanded a 21% share in Q1 2019.

**Figure 23: Share of listening hours, by nation**



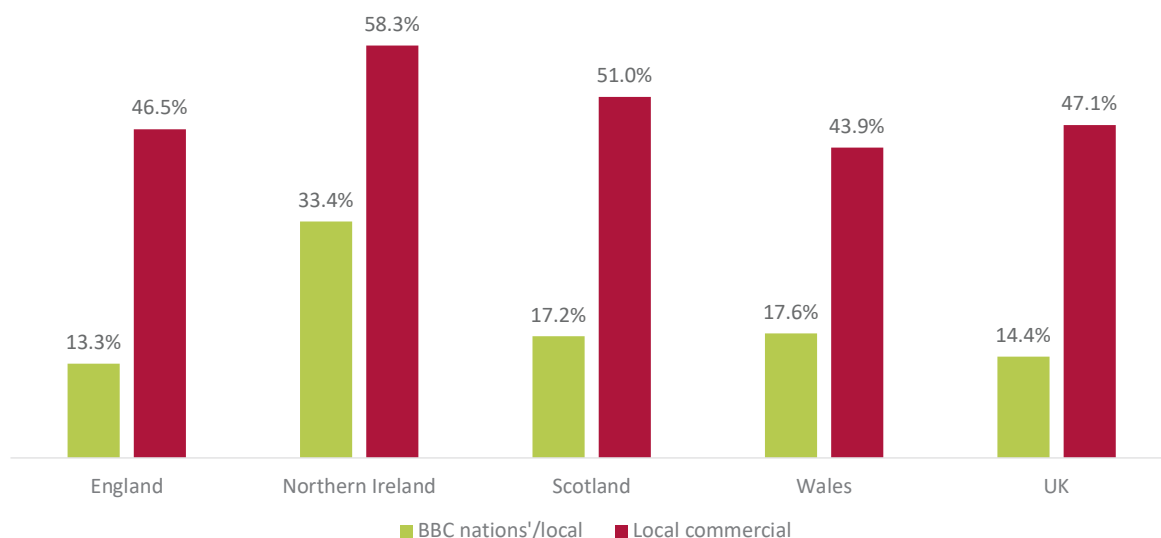
Source: RAJAR, all adults (15+), Q1 2019

England = BBC Local Radio in England TSA; Scotland = BBC Radio Scotland TSA; Wales = BBC Radio Wales TSA; Northern Ireland = BBC Radio Ulster TSA.

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

More than half of adults in Northern Ireland listened to local commercial stations (58.3%) with around a third (33.4%) listening to BBC nations/local radio in Q1 2019. Across the UK, less than half of adults listened to local commercial radio and less than 15% listened to local BBC stations.

Figure 24: Weekly reach to local radio – BBC vs. commercial



Source: RAJAR, All adults (15+), Q1 2019.

## Smart speaker ownership has increased by almost 50% in the past year

The use of smart speakers is increasing in the home, with uses from streaming music and listening to live radio, to accessing weather reports or setting personal alarms. Just over a fifth (22%) of Northern Ireland households own a smart speaker – up 7pp since last year, and in line with the UK average.<sup>24</sup>

## One in five adults have listened to podcasts and listen-again services

In 2019, Ofcom research shows that one in five adults (22%) in Northern Ireland have used listen-again services or tuned in to podcasts, in line with respondents in Scotland (25%), but a lower proportion than in England (34%) or Wales (30%).<sup>25</sup>

<sup>24</sup> Ofcom Technology Tracker 2019

<sup>25</sup> Ofcom Technology Tracker 2019

UK-based providers had the most claimed use among Northern Ireland respondents. Around one in seven quoted using the BBC (16%), UK commercial radio (16%) or other UK-based providers (13%), whereas non-UK based providers accounted for 11% of claimed use.<sup>26</sup>

## Podcasting in Northern Ireland

Podcast content covering a range of genres including current affairs, sports, music and comedy/drama, both in English and the Irish languages, is produced by the BBC from its two radio stations in Northern Ireland, Radio Ulster and Radio Foyle. Among these is Nolan True Crime, a podcast in the true crime genre. Podcasts are also produced by commercial stations in Northern Ireland, such as U105 and community radio stations such as Raidió Fáilte.

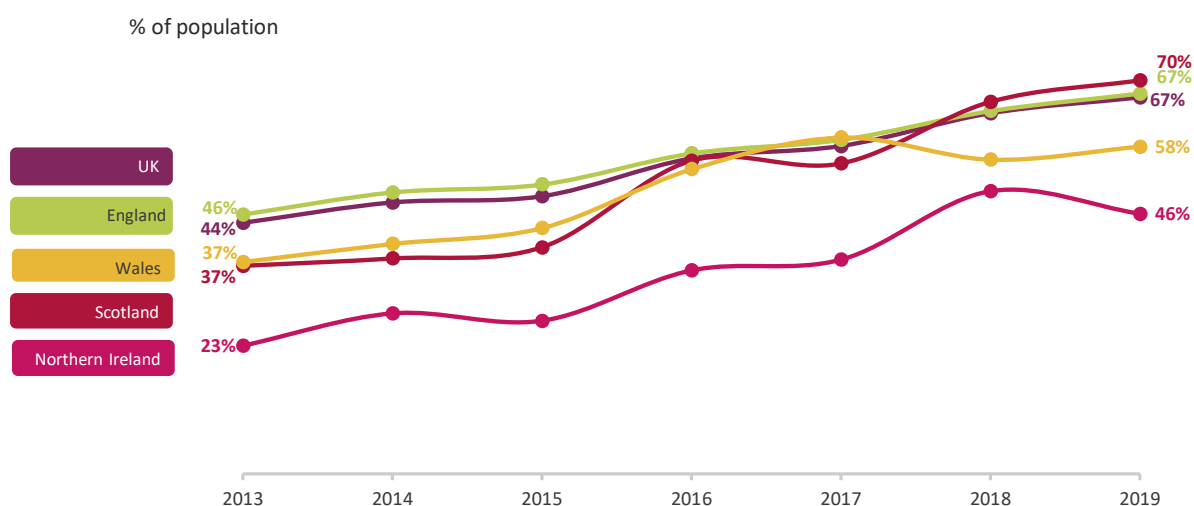
As elsewhere in the UK, there are several examples of news brands producing podcasts, in particular about sport. For example, the Belfast Telegraph publishes an *Ulster Rugby Roundup Podcast*, while the Irish News offers its *WEKENDER Sports Podcast* and Belfast Live's *That's What I Call Football*.

Examples of other local podcasts include [Runner Beans Podcast](#), a podcast for runners in Northern Ireland, and comedy podcast [Boy Town](#).

## Take-up of digital radio is lower in Northern Ireland than the other UK nations

Just under half of adults Northern Ireland (46%) owned a DAB radio in Q1 2019. This remains significantly lower than across the UK as a whole (67%), Scotland (67%) and Wales (58%).

Figure 25: DAB ownership



Source: RAJAR, all adults, Q1 in each year.

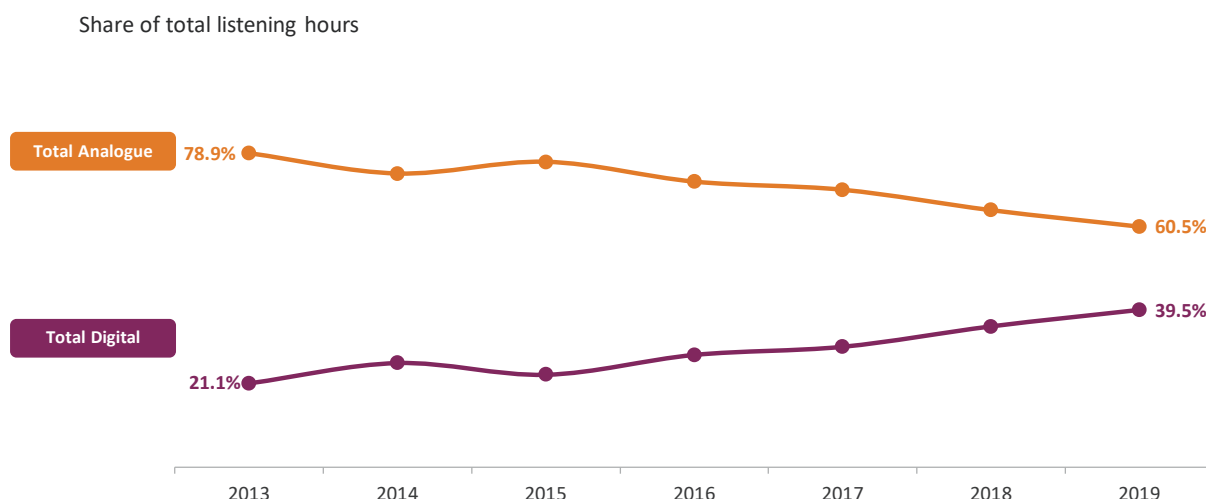
<sup>26</sup> Ofcom Technology Tracker 2019



## Nearly 40% of listening was through a digital platform at the start of 2019

In Northern Ireland there was a year-on-year increase of 4pp in the share of radio listening to digital radio – DAB, DTT and online (including smart speakers) – to 39.5% of all listening hours at the start of 2019.<sup>27</sup>

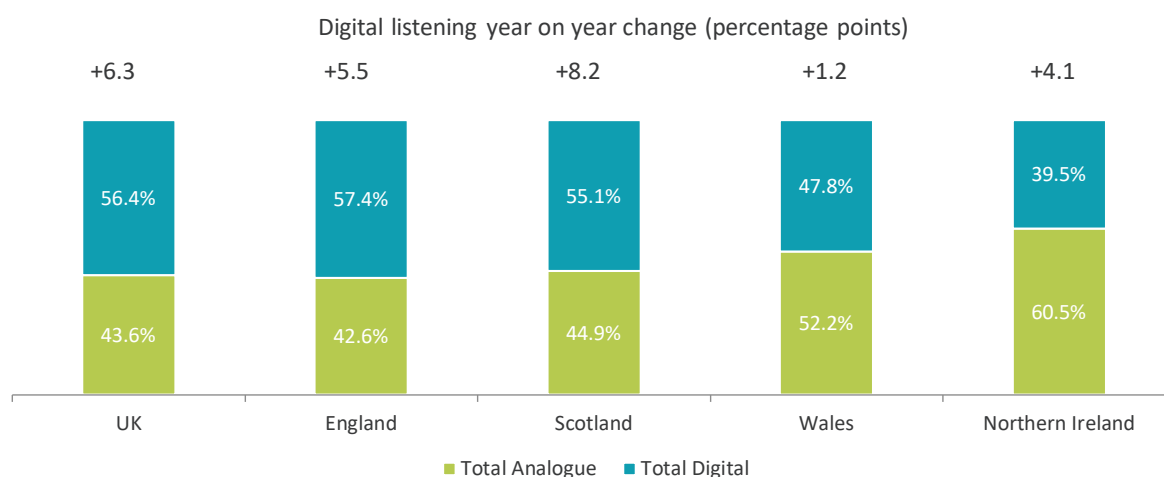
**Figure 26: Share of listening hours via digital and analogue platforms in Northern Ireland: 2013-2019**



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

Despite this, digital radio listening in Northern Ireland, as a share of all radio listening, remained far lower than in the UK overall (56.4%), Scotland (55.1%) and Wales (47.8%), at the start of 2019.

**Figure 27: Share of listening hours via digital and analogue platforms**



Source: RAJAR, All adults (15+), Q1 2019; within the BBC Radio TSA for each nation

<sup>27</sup> DAB radio set, digital television and the internet

Half of radio listeners in Northern Ireland said they were unlikely to buy a DAB set; at 51% significantly less than listeners in Scotland (72%), Wales (70%), or England (65%). One in ten (9%) said they would be likely to buy a DAB radio in the next 12 months.<sup>28</sup>

Among those saying they were unlikely to buy a DAB set, the majority said they had no need for one (62%), while four in ten (39%) said they were happy to use an existing service.<sup>29</sup>

## Preparing for small-scale DAB

Small-scale DAB is a new way of transmitting digital radio that uses advances in software and low-cost computer technology to provide a flexible and inexpensive approach to the terrestrial broadcasting of digital radio services to a relatively small geographic area.

The concept was first tested by Ofcom engineer Rashid Mustapha in 2012, and subsequently the UK government funded a series of trials, licensed and facilitated by Ofcom, to test the feasibility of the technology. The trials demonstrated that small-scale DAB can provide a robust and reliable way for small analogue stations to broadcast on digital, as well as for entrants wishing to launch new radio services on a digital terrestrial platform.

In July 2019, Ofcom set out how it plans to license small-scale DAB, using new powers that the government is proposing, through Parliament, to give us. This will enable a significantly wider range of commercial and community radio stations to broadcast on the UK's DAB digital radio platform.

Following the [consultation](#), Ofcom plans to publish a statement early in 2020.

## BBC Radio Ulster was the most popular radio station in Northern Ireland in Q1 2019

BBC Radio Ulster was the most listened-to radio station across Northern Ireland<sup>30</sup> in Q1 2019, with a reach of 32.4% (2018=38.5%), followed by Cool FM at 31.6% (2018=32%).

Within the Belfast area, where 60% of the Northern Ireland population live,<sup>31</sup> Cool FM had a greater reach, at 37.3% (2018=38.2%). BBC Radio Ulster was the second most popular station with a reach of 31% (2018=36.2%).

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<sup>28</sup> Ofcom Technology Tracker 2019

<sup>29</sup> Ofcom Technology Tracker 2019

<sup>30</sup> RAJAR's BBC Radio Ulster TSA

<sup>31</sup> RAJAR's U105 TSA.

**Figure 28: Top three radio stations, by region**

	UK		Northern Ireland*		Belfast**	
Rank	Station	Weekly reach (%)	Station	Weekly reach (%)	Station	Weekly reach (%)
1	BBC Radio 2	28.0%	BBC Radio Ulster	32.4%	Cool FM	37.3%
2	BBC Radio 4	20.1%	Cool FM	31.6%	BBC Radio Ulster	31.0%
3	BBC Radio 1	17.0%	Q Radio	17.9%	U105 (Greater Belfast)	22.3%

Source: RAJAR, all adults 15+, Q1 2019

\* BBC Radio Ulster TSA

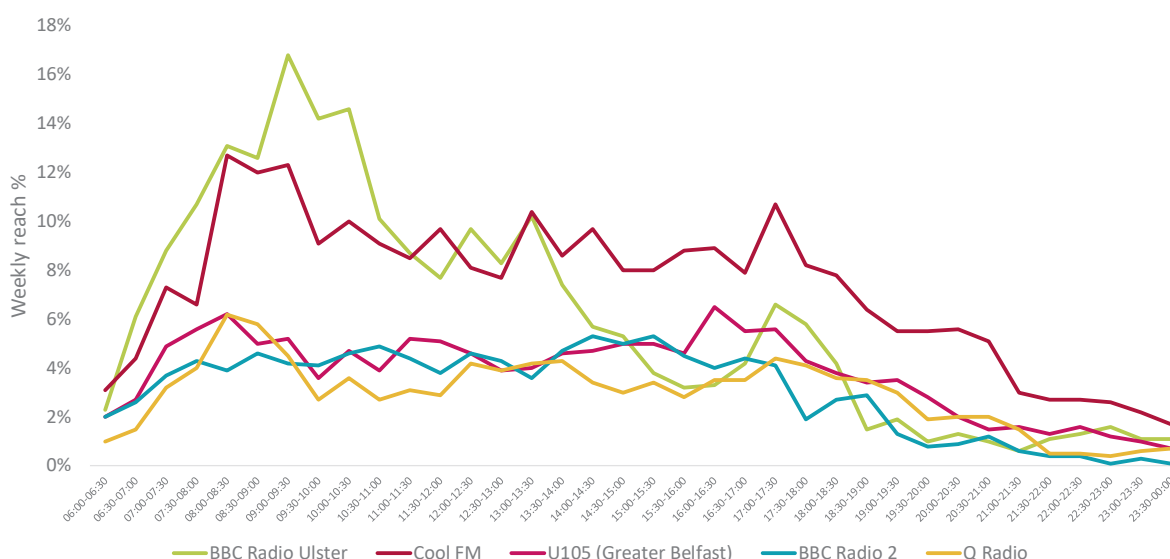
\*\* U105 TSA (Greater Belfast)

## The peak time to listen to the radio during the week in Belfast is between 9.00 and 10.00am

The breakfast and mid-morning shows are the most listened-to programmes on Cool FM and Radio Ulster in the Belfast area. The most listened-to programme at this time in this area is BBC Radio Ulster's *The Stephen Nolan Show*.

Across the duration of the show<sup>32</sup> it reaches 20.4% of the Belfast area, slightly lower than the 21.0% reach across Northern Ireland as a whole. Cool FM has a bigger audience reach than its rivals in Belfast from lunchtime on.

**Figure 29: Average audience across the day in Belfast, Mon-Fri**



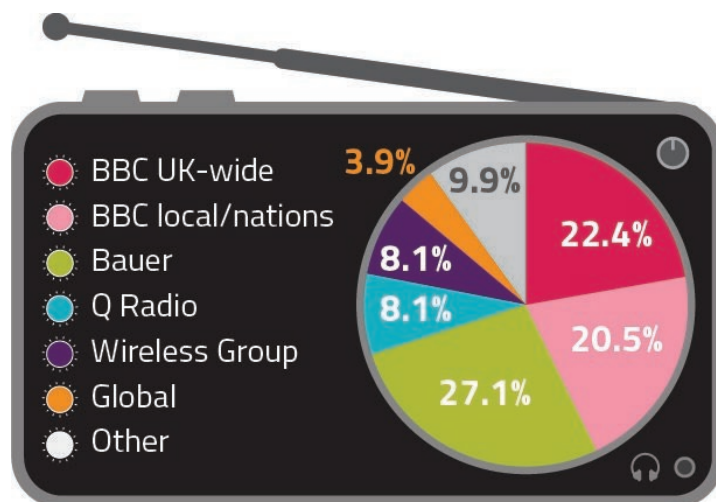
Source: RAJAR, all adults 15+, Q1 2019  
U105 TSA

<sup>32</sup> 09:00-10:30 Monday-Friday

## Bauer stations accounted for more than a quarter of all listening in Northern Ireland in Q1 2019

Within Northern Ireland, the BBC had a 42.9% share of the radio market in Q1 2019. Of the commercial radio groups, Bauer Radio – which owns Cool FM, Downtown Radio and Downtown Country – had the largest proportion of the market at 27.1%, followed by Wireless Group, owner of U105, with 8.1% and the Q Radio stations which also had a share of 8.1%.

Figure 30: Share of listening in Northern Ireland, by radio group

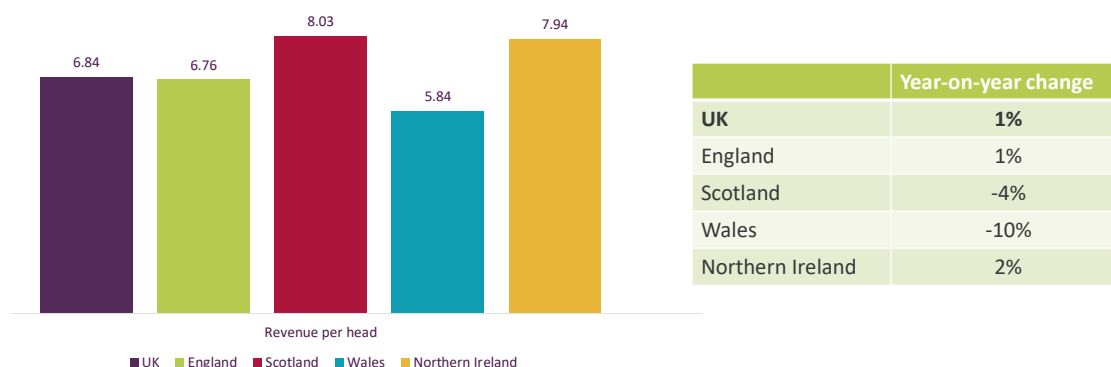


Source: RAJAR, All adults (15+), Q1 2019, BBC Radio Ulster TSA

## Commercial radio revenue for local stations increased by 2% in 2018

Local analogue commercial radio stations in Northern Ireland, such as Cool FM, Q Radio and U105, generated £7.94 per head of population in 2018, a rise of 2% on the previous year.

Figure 31: Local / commercial radio revenue per head: 2018 (£)



Source: Ofcom/broadcasters. Note: These figures solely relate to relevant turnover reported against AL licences (local analogue commercial) and include local and national revenues and sponsorship, i.e. not only revenues relating to adverts aimed at the specific nation. YoY figures adjusted for CPI.