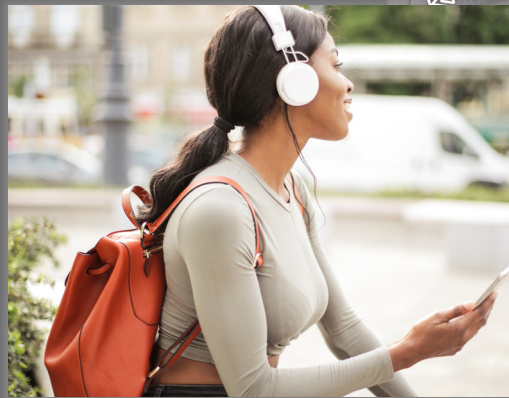


Media Nations 2020

Northern Ireland report



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Overview

This *Media Nations: Northern Ireland* report reviews key trends in the television and audio-visual sector as well as the radio and audio industry in Northern Ireland. The majority of the research relates to 2019 and early 2020 but, given the extraordinary events that surround the Covid-19 pandemic, Ofcom also undertook research into how our viewing and news consumption habits changed during this period. This is explored in the *Impact of Covid-19 on audiences and broadcasters* section.

The report provides updates on several datasets, including bespoke data collected directly from licensed television and radio broadcasters (for output, spend and revenue in 2019), Ofcom's proprietary consumer research (for audience opinions), and BARB and RAJAR (for audience consumption).

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](#).

Key points

Impact of Covid-19 on audiences and broadcasters

- There was a significant increase in broadcast TV viewing during the early stages of the Covid-19 pandemic. People in Northern Ireland spent an average of 4 hours and 53 minutes per day watching something on the TV screen at the height of the lockdown in April 2020, a 69-minute increase on the figure for 2019.
- BBC services were the most-used services for news about Covid-19 during the early stages of the lockdown. More than eight in ten (83%) online respondents in Northern Ireland used BBC services during the first four weeks of the lockdown period.

TV services and devices

- Paid-for satellite and cable television services from Sky and Virgin Media are present in just under half of homes in Northern Ireland (44%).
- At the beginning of 2020, some 62% of homes had some way of connecting their TV to the internet, through a smart TV or other device such as a streaming stick.
- More than half of households in Northern Ireland (56%) have a subscription video-on-demand (SVoD) service from companies such as Netflix, Amazon and Now TV.
- Netflix is the most popular, present in nearly half of homes (49%) while Amazon Prime Video is present in around a quarter of homes (28%).
- The BBC iPlayer is the most popular broadcast video-on-demand (BVOD) player in Northern Ireland. It is watched in just under a third of homes (30%), followed by the ITV Hub (21%), All4 (18%) and My5 (14%).

Broadcast TV viewing

- People in Northern Ireland continue to watch less broadcast TV than in any other UK nation, on average. People in Northern Ireland spent 2 hours 54 minutes watching broadcast television in 2019; an 11-minute (5.8%) decline from 3 hours 5 minutes in 2018.
- For the second consecutive year, Derry Girls was the most-watched programme in Northern Ireland.
- UTV and BBC One are the most-used sources for people looking for news about Northern Ireland.

Spend on programming for and from Northern Ireland

- There was an 18% increase in spending on first-run content for viewers in Northern Ireland in 2019. Of this £32.9m spend, the majority went towards non-news/non-current affairs programming, at £13.2m, up by 16% since the previous year. The increase in spend on other genres ends the steady decline seen over recent years.
- Current affairs had the largest relative increase in first-run spend, increasing by 48% on the previous year to a record high of £8.6m.
- Overall, news content dominates the BBC's output for Northern Ireland, comprising over half (54%) of first-run hours.
- UTV's hours of first-run content for Northern Ireland have remained stable since 2016, with 355 hours of programme output in 2019.

Radio and audio

- Nine in ten adults in Northern Ireland tune in to live radio every week, on average, for more than 19 hours a week.
- Local stations – Cool FM, Downtown, Downtown Country, U105, the Q Network and Radio Ulster/Foyle – account for 59% of listening in Northern Ireland, far higher than their counterpart stations in Scotland and Wales.
- Radio is a popular news platform, with four in ten adults using it to access news about their nation, higher than the use of radio for news in Scotland or Wales.
- Digital listening (over DAB and online) continues to grow, rising 3.5pp to 43% (Q1, 2020) but remains significantly below the other UK nations.
- About one in five homes in Northern Ireland had smart speakers at the beginning of 2020 (21%). The most popular use of smart speakers among users in NI was to listen to a live radio station (67%).

The impact of Covid-19 on audiences and broadcasters

Introduction

The role of broadcasters has never been so important as in the early stages of the Covid-19 pandemic. The public looked to broadcasters – on TV and radio – to keep them updated on news about the pandemic and entertained as the lockdown kicked in. Viewing figures for April especially underlined what a key role all broadcasters played during that time.

The pandemic has had a significant impact on all aspects of the broadcasting sector in Northern Ireland and will continue to affect the industry for many months to come.

Broadcast TV viewing and news consumption

Lockdown prompted a surge in TV viewing

The Government's implementation of lockdown measures in mid-March 2020 resulted in people having more time for indoor leisure activities in the spring and early summer than in any comparable extended period in recent history.

As a result, there were significant increases in both broadcast TV viewing and what we refer to as 'unmatched' viewing – time spent watching the TV set that cannot be attributed to broadcast programming by TV measurement agency BARB.¹

People in Northern Ireland spent an average of 4 hours and 53 minutes per day watching something on the TV screen at the height of the lockdown in April 2020, a 69-minute increase on the figure for 2019. Most of this was still to broadcast television (3 hours and 27 minutes, up 19% on 2019) while viewing on the TV set that cannot be matched to broadcast viewing (like YouTube, SVoD and gaming) was 1 hour and 18 minutes, an increase of 78% on 2019.

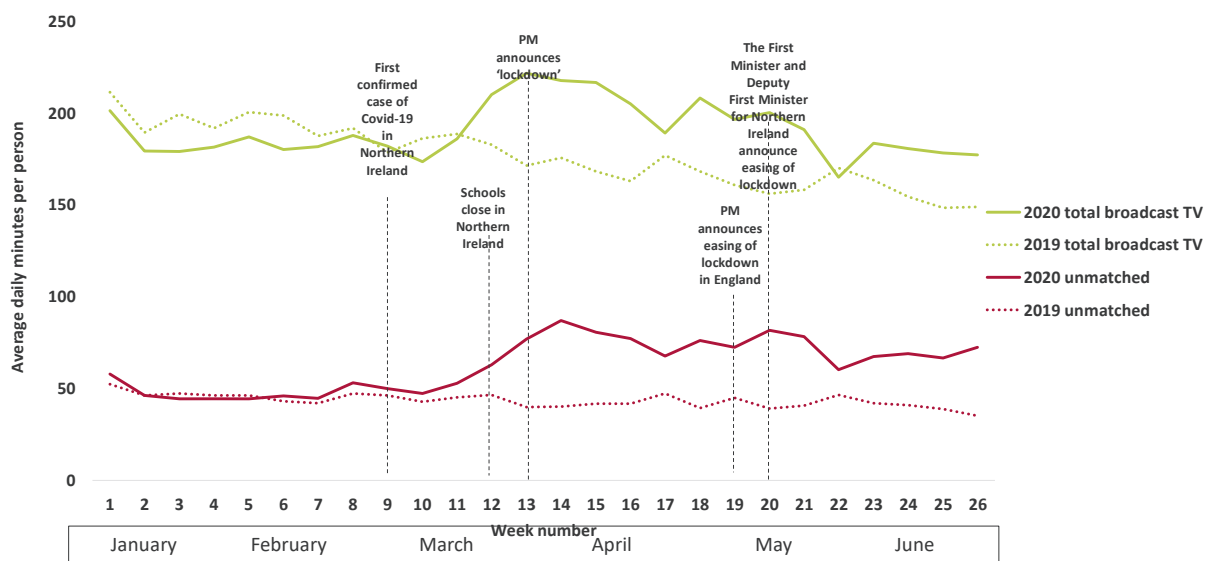
¹ Unmatched viewing = TV set in use but content cannot be audio-matched or otherwise identified. Includes gaming, viewing DVDs/box sets/archives, SVoD, YouTube, time-shifted viewing beyond 28 days, apps on smart TVs and navigation around EPG guides where there is no in-picture broadcast content.

Peak TV screen viewing in Northern Ireland: April 2020 at the height of the lockdown



In the week beginning 23 March (week 13), when the Prime Minister addressed the nation to announce the lockdown, average daily viewing of broadcast television peaked at 3 hours 42 minutes in Northern Ireland. As the lockdown progressed, the combination of reduced viewing of news programming, easing of social restrictions and good weather across most of Northern Ireland saw broadcast TV viewing decline from its peak – but it remained higher than 2019 levels during the analysis period up to the end of June 2020, with the exception of the week commencing 25 May (week 22). Unmatched viewing, meanwhile, has not declined in a comparable way, retaining much of the uplift it achieved as a result of lockdown, mainly due to a sustained increase in the viewing of subscription video-on-demand (SVoD) services such as Netflix and Amazon Prime Video.

Figure 1: Total broadcast TV and unmatched viewing (daily mins per person) in Northern Ireland

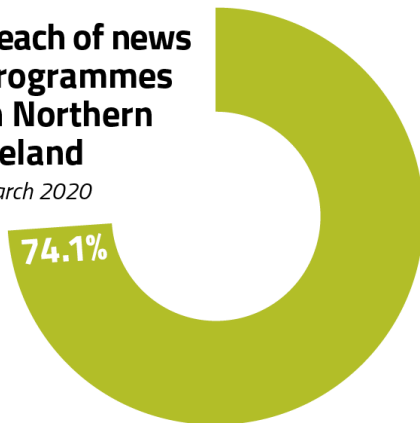


Source: BARB. All individuals (4+). BBC Ulster area

Despite the increase in the amount of time spent watching broadcast TV during the lockdown period, the proportion of people who watched on average, in a week (average weekly reach²) remained below 2019 levels each month from January to June, with the exception of March (when it was 88.2%, up slightly from 87.9% March 2019). From January to June 2020 the average weekly reach for all measured broadcast TV in Northern Ireland was 84.8%, compared to 87.6% for the same period in 2019.

Reach of news programmes in Northern Ireland

March 2020



The year-on-year decrease in total broadcast TV reach in Northern Ireland came despite an increase in the average proportion of people watching news programming average each week. The weekly reach of news on measured broadcast TV channels in 2020 peaked in March (74.1%) and although it has decreased since then (down to 66.4% in June 2020), it remains higher than in the same months in 2019.³

The increase in news viewing in March helped the PSB channels collectively increase their share of all broadcast viewing – up to 59.9% in March from 57.1% in February.

The BBC was the most-used news source for information about Covid-19

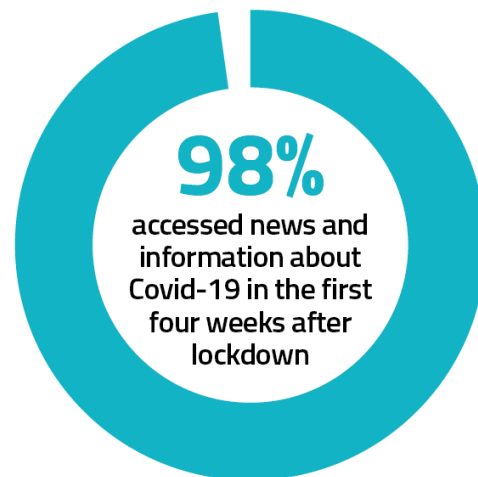
The Covid-19 pandemic has been one of the biggest news stories of recent decades, affecting all parts of society in all parts of the world. Unsurprisingly, people's appetite for news surged during this period, with the public eager to keep up with the latest developments. Given the diverse media landscape that exists in each of the UK nations, Ofcom carried out research during the pandemic to better understand where people were getting news from.

The findings show that TV and radio services from traditional broadcasters like the BBC and UTV were the most-used sources of news for people in Northern Ireland, some way ahead of social media.

² Reach criteria for all broadcast TV: 15+ consecutive minutes.

³ Reach criteria for news programming: 3+ consecutive minutes. News programming includes national/international and regional news.

In the first four weeks of the lockdown (27 March to 19 April), almost all the online population in Northern Ireland accessed news and information about Covid-19 at least once a day; there was no significant difference between the individual nations (Northern Ireland 98%, Wales 98%, England 97% and Scotland 97%). Although this figure has decreased, it remained high during the four weeks to mid-May (92%) and the four weeks to mid-June (91%). The frequency has decreased since the height of the crisis, with one in five (18%) in Northern Ireland accessing news and information at least 20 times or more during the first four weeks of lockdown compared to 8% during the four weeks to mid-June.

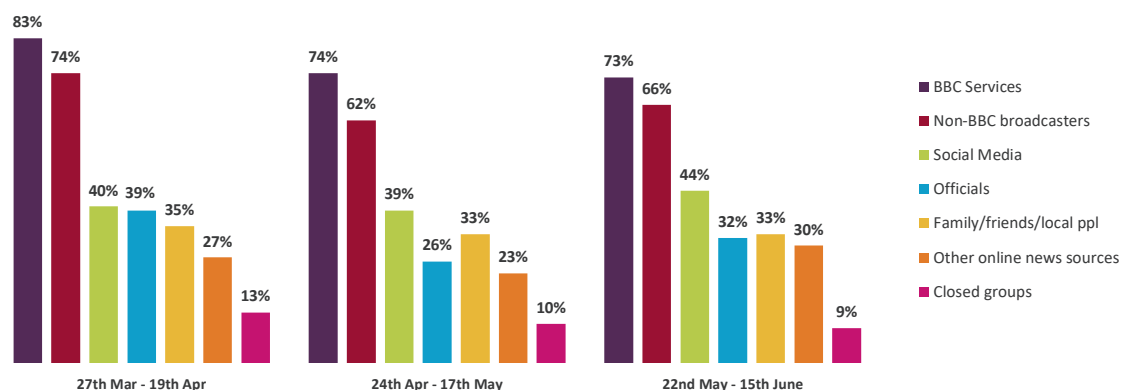


More than eight in ten (83%) online respondents in Northern Ireland used BBC services (see Figure 2) during the first four weeks of the lockdown period. This was the most-used service, as it was across all the nations (England 79%, Wales 78% and Scotland 76%). BBC services continued to be the most-used service during the four weeks to mid-May (74%) and the four weeks to mid-June (73%).

Three quarters (74%) of online respondents in Northern Ireland used non-BBC services during the first four weeks of lockdown, decreasing to 66% during the four weeks to mid-June. However, the use of non-BBC broadcasters, mainly UTV, was higher in Northern Ireland than in the other devolved nations.

Social media and official sources such as the NHS were used by four in ten and three in ten online respondents respectively in Northern Ireland by mid-June.

Figure 2: Sources used in Northern Ireland for news/information about Covid-19



Source: Ofcom Covid-19 news and information: consumption and attitudes Q3a. Which, if any of the following sources have you used to get information/news about the Coronavirus outbreak in the last week? Base: All respondents in Northern Ireland who are getting information/news about the Coronavirus outbreak Month 1 (293), Month 2 (257), Month 3 (277)

How broadcasters responded to the Covid-19 pandemic

Making TV while social distancing

TV and radio services enjoyed strong audiences as people looked for news and information as well as company and entertainment during the lockdown. But continuing to provide a service was far from straightforward with social distancing guidelines in place.

Despite the challenges, broadcasters continued to provide news, current affairs and entertainment programming throughout the week on TV and radio.

In some cases, broadcasters were able to provide an enhanced service. From late March to late April two of BBC Radio Ulster's most popular programmes – *The Nolan Show* and *Talkback* – were extended by half an hour each day.

There was considerable interest in Radio Ulster/Foyle programmes on the BBC Sounds platform too, with weekly requests during the first four weeks of lockdown some 60% higher than the 2019/2020 average. During the week of lockdown announcements, there were 3.8 million page visits to BBC NI's coverage of the story.⁴

The story also had a strong political angle: the Northern Ireland Executive headed up the response to the pandemic. Programmes like *The View* (BBC NI) and *View from Stormont* (UTV) remained on air, providing critical analysis of the unique political and policy setting in Northern Ireland.

Broadcasters also focused on their online presence. At the height of the pandemic, some 20,000 viewers were tuning into the Northern Ireland Executive's daily briefings through UTV's social media platforms.⁵

Making television is a team activity and while viewers noticed only minor on-air changes, broadcasters had to make considerable behind-the-scenes adjustments. Managers had to devise new and safe ways of working while crews found innovative ways to keep filming in lockdown. Many of the BBC's and UTV's reporters worked from home, news-gathering on their laptops and interviewing people on video calls.

Covid-19 is one of the most significant news stories of recent decades with strong news and public interest credentials. Local broadcasters highlighted the challenges facing frontline health workers in hospitals and care homes across Northern Ireland, while carrying strong human-interest stories on those who survived the disease and those who didn't.



⁴ Source: BBC Northern Ireland

⁵ Source: UTV

In addition, initiatives like UTV's *Rainbows* segment at the end of the evening news, which ran for the duration of the Clap for Carers campaign, received hundreds of drawings from viewers' children in support of key workers every day, helping to capture the sense of community that existed at the time.

Local radio connects with listeners

As highlighted in the *Radio and audio* section of this report, local commercial radio has significant reach in Northern Ireland and these stations had an important role to play in keeping people up to date and entertained during the lockdown.

But as with TV, the business of making radio was hugely challenging during this period. Commercial stations were hit hard by the fall in advertising revenue. Some of the decline was offset by increased government spending on health and other messaging, but the financial environment is challenging for these stations and is likely to remain that way for some months.

Practically, local stations had to overcome logistical challenges to stay on air while social distancing. Some stations were able to continue broadcasting from their bases. Others had to adjust a significant portion of their daily schedule to allow presenters to broadcast from their home, in their living room, kitchen or spare bedroom. Some took to social media to show off their new 'home' studios surrounded with pillows and quilts to replicate studio-like sound conditions.

In these circumstances, stations didn't hide their new surroundings and often revelled in the fact that they were sharing similar challenges to those of their listeners, many of whom were also working from home.

Changed listening habits

Unsurprisingly, lockdown prompted some significant shifts in listening habits. Stations reported increased engagement, especially through social media channels, and an increase in online listening through smart speakers. And according to one local station "the mid-morning show became the new breakfast show", as people's days started a little later without the school run or the daily commute into work.

In reporting Covid-19, stations adopted similar approaches. Apart from news bulletins, phone-in shows and other dedicated programming, the rest of the schedules were largely Covid-free. A significant amount of time was devoted to keeping spirits up as well as highlighting the good work of carers and other key workers.

Examples were the five-minute pieces for key workers produced by Q Radio, which featured celebrity voices including Adrian Dunbar and the cast of *Derry Girls* reading out letters from readers about family members "who have put themselves on the line to help".

Meanwhile, Downtown and Downtown Country responded to the closure of churches by broadcasting a special religious programme on Sunday mornings.

Making use of social media

Downtown / Cool FM, which has a particularly strong reach on Facebook, used the platform to provide a lot of additional Covid-19 news coverage as well as music and entertainment programmes and events during the lockdown period.

The station carried live coverage of the Stormont Daily briefings as well as interviews with government ministers and health experts at the peak of the pandemic. The lighter side of life was catered for too, with weekly slots aimed at parents and children, online quizzes and DJs presenting Saturday night lockdown house parties.

The government also made extensive use of local radio services to deliver key messages and information throughout the pandemic.

The enterprising approach of the sector throughout this time was exemplified by an interview by Downtown / Cool FM with 97-year old 'May', a care home resident who became Northern Ireland's oldest Covid-19 survivor.

The news team interviewed her on WhatsApp and followed this up by arranging a Facebook special, after being invited to 'May's' virtual 98th birthday party a few weeks later. First Minister Arlene Foster made an appearance with a special birthday message.

BBC NI redundancies

Broadcasters across the UK have been seriously affected by the Covid pandemic, with the BBC looking to reduce staff numbers in Northern Ireland.

It has to make savings of £3.6m from its annual Northern Ireland budget of £56m by the end of March 2021, with the Corporation citing long-term financial pressures that have been compounded by the pandemic.⁶

The Corporation, which employs around 650 staff in Northern Ireland, plans to cut some 30-40 posts with these being sought, wherever possible, through voluntary redundancies. The redundancies are part of significant cutbacks the BBC is planning across the UK.

The BBC had already "paused" plans to redevelop and extend Broadcasting House in Belfast; funding for the £77m scheme was approved by the BBC board in 2018. The project will now be subject to review.

⁶ BBC News, [BBC NI: 'Savings of £3.6m needed by March 2021'](#), 23 June 2020.

TV services and devices

Introduction

While television is still the main device for delivering entertainment services into people's homes, the range of services and the platforms over which they are delivered has grown rapidly in recent years.

Traditional platforms such as Freeview, which is available through digital terrestrial television (DTT), satellite – either from Sky or Freesat, and cable (Virgin Media) are still the main providers in this area.

These platforms rely on a variety of types of infrastructure to deliver their services. Freeview uses a network of transmitters across Northern Ireland to deliver television services into people's homes through a rooftop aerial – this method is widely, although not universally, available across Northern Ireland. Satellite is universally available,⁷ while cable coverage is mainly available in built-up urban areas.

However, the story of recent years has been the rapid rise of new subscription video-on-demand (SVoD) services from providers such as Netflix and Amazon Video, helped by the spread and improved speed of broadband networks. Although these SVoD services are mainly taken in addition to content on other platforms, they are having a hugely disruptive effect on the sector, gaining new customers and affecting how and where people are watching TV-like content.

Traditional public service broadcasters are also adapting how they deliver content to viewers. Alongside their linear TV services, the BBC, ITV, Channel 4 and Channel 5 all have their own broadcaster video-on-demand (BVoD) services. These SVoD and BVoD services are delivered over the internet through connected TVs as well as mobile phones and tablets.

Traditional TV platforms

More homes in Northern Ireland have a pay-TV service than rely on Freeview or Freesat

Televisions are an established fixture in our homes, with more than nine in ten households in Northern Ireland (96%) having a TV set at the beginning of 2020.⁸ But the way we access services on our televisions is changing, primarily because of the amount of content that is being delivered and accessed through the internet.

Traditional paid-for television services such as satellite (mainly Sky) and cable services (Virgin Media) were present in just under half of homes in Northern Ireland (44%) at the beginning of 2020. Paid-for satellite accounts for most of these, with Virgin Media's cable service present in just 11% of households.

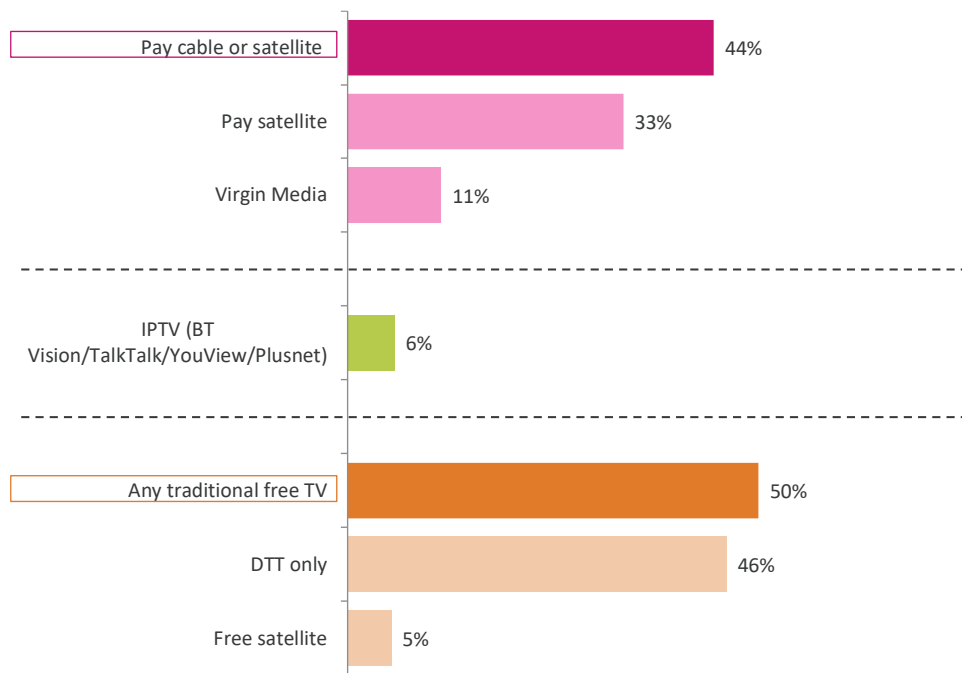
⁷ Based on the availability of a line-of-sight path to the satellite

⁸ BARB Establishment Survey Q1 2020

Free TV services – either through an aerial (DTT) or satellite (Freesat) – were present in 50% of Northern Ireland homes. DTT services only (Freeview) account for most free TV viewing, with free satellite present in just 5% of homes.

Only a small proportion of homes in Northern Ireland (6%) had an IPTV-based service. These are delivered through set-top boxes from providers including TalkTalk and BT and offer a Freeview service alongside pay-TV channels delivered through an internet connection.

Figure 3: Take-up of different TV platforms in Northern Ireland



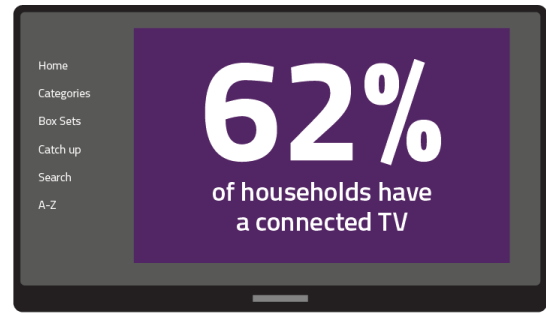
Source: BARB Establishment Survey Q1 2020

Online TV platforms

More than half of homes in Northern Ireland have a TV set connected to the internet

As with other nations of the UK, the take-up of subscription video-on-demand (SVoD) services from companies like Netflix and Amazon, delivered over the internet, continues to gather pace among households in Northern Ireland.

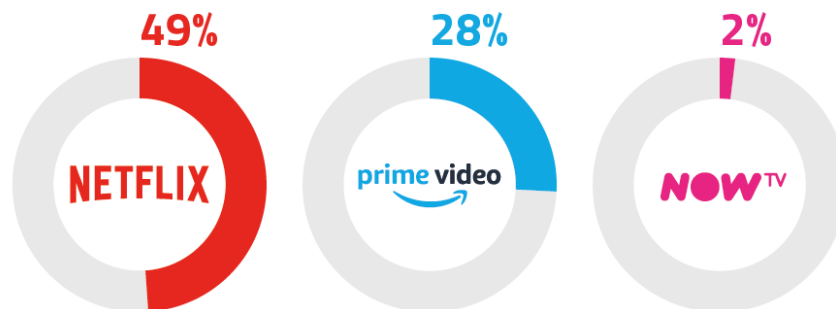
Some 84% of households in Northern Ireland had a fixed-line broadband connection at the beginning of 2020, and 62% of homes had a TV connected to the internet through a smart TV or a device such as a streaming stick (e.g. Amazon Fire, Roku and Google Chromecast).⁹



Nearly half of all homes use Netflix

More than half of NI households (56%) had a subscription to one or more of the paid-for online services – Netflix, Amazon Video or Now TV – at the beginning of 2020. Netflix was the most popular, present in nearly half of homes (49%) while Amazon Video was present in around a quarter of homes (28%). A significant amount of viewing of these services is on devices other than a TV such as smartphones and tablets.

And competition for viewers from and between these paid-for online players is set to increase with the launch of several new high-profile services from Apple (Apple TV+), Disney (Disney+) and BBC/ITV (BritBox) in the past year.



Source: BARB Establishment Survey Q1 2020

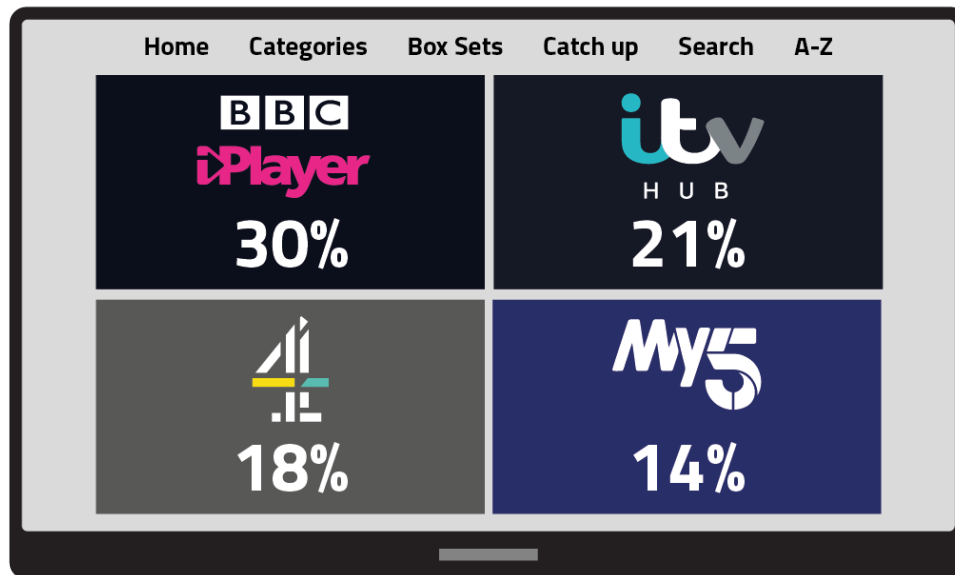
Online players from traditional broadcasters are also proving popular

The broadcaster video-on-demand (BVOD) players from the BBC, ITV, Channel 4 and Channel 5 are also proving popular with viewers. The most popular, the BBC iPlayer, was watched in nearly a third of Northern Ireland homes (30%) at the beginning of 2020. The ITV Hub was the next most popular BVOD player, followed by All4 and My5.¹⁰

⁹ Ofcom Technology Tracker 2020

¹⁰ Ofcom Technology Tracker 2020

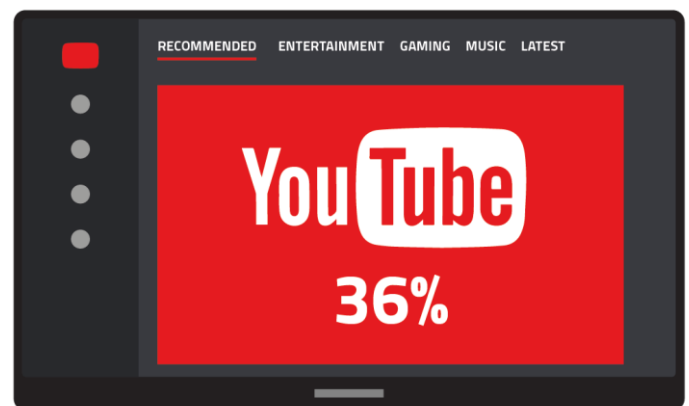
Figure 4: Use of main broadcaster video-on-demand (BVoD) services in Northern Ireland (households)



Source: Ofcom Technology Tracker 2020

A third of homes in Northern Ireland use YouTube

Research carried out for Ofcom’s Online Nation 2020 report¹¹ highlighted that viewers are spending a significant amount of time watching video content online on sites like YouTube. Indeed, a third of adults (32%) across the UK who are online report spending more time watching videos on the internet than they do watching live TV (not including recorded playback or BVoD viewing), rising to 57% among 18-24 year olds.¹² Just over a third of households in Northern Ireland used YouTube to watch programmes, films or other video content, at the beginning of 2020.¹³



¹¹ Ofcom, [Online Nation](#), 2020

¹² [Ofcom video-sharing platforms research 2020 \(adults\)](#)

¹³ Ofcom Technology Tracker 2020

Broadcast TV viewing

Introduction

People in the UK still spend hours watching TV every day, but over the past decade new services and new ways of watching have emerged, driven largely by improved broadband networks and new on-demand services delivered over the internet. The ability for viewers to watch what they want when they want through online players from the BBC, ITV, Channel 4 and others has proven especially popular with younger people.

Having TV sets that can be connected to the internet has also paved the way for major global players like Netflix, Amazon and others to launch new subscription video-on-demand (SVoD) services in markets around the world, providing yet more choice for viewers and increased competition for domestic broadcasters.

The consequences of this increasingly fragmented TV landscape can be seen throughout this *Broadcast TV viewing* chapter. Daily viewing of broadcast television in Northern Ireland fell again in 2019 but remains significant at an average of 2 hrs 54 mins a day, while the amount of time spent watching other content such as SVoD services has increased, although it is still modest in comparison.

Significant numbers still tune in for popular television series, with the most-watched programme in Northern Ireland last year – an episode of *Derry Girls* – attracting more than half a million viewers. Elsewhere, Ofcom's News Consumption Survey research underlines the importance of public service broadcasting in Northern Ireland, with UTV and BBC One the most popular sources of news.

Where our data comes from

TV screen viewing data and analysis in this section uses data from the Broadcasters' Audience Research Board (BARB), a nationally representative panel of 5,300 homes across the UK (with more than 300 homes in Scotland) 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.

Unless otherwise stated, figures quoted are for seven-day consolidated viewing on a 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).

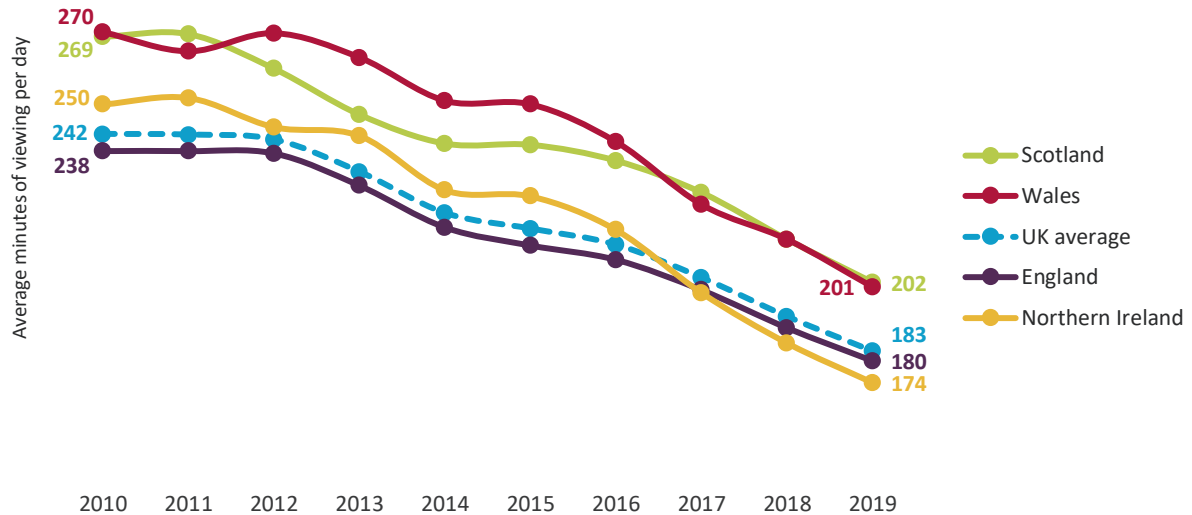
Data included in this section are for the calendar year 2019 (pre-Covid) and do not reflect the different viewing patterns during that period, outlined elsewhere in this report.

In 2019 people in Northern Ireland spent an average of 2 hours 54 minutes per day watching broadcast television

People in Northern Ireland continue to watch less broadcast TV than in any other UK nation. On average, people in Northern Ireland spent 2 hours 54 minutes watching broadcast television in 2019. This is an 11-minute decline from 3 hours 5 minutes in 2018, and 76 minutes less than people were

watching at the start of the decade. Daily viewing in Northern Ireland declined by 5.8% between 2018 and 2019. The overall decline for the UK was 4.9%.

Figure 5: Average daily minutes viewed per person, by nation: 2010-2019



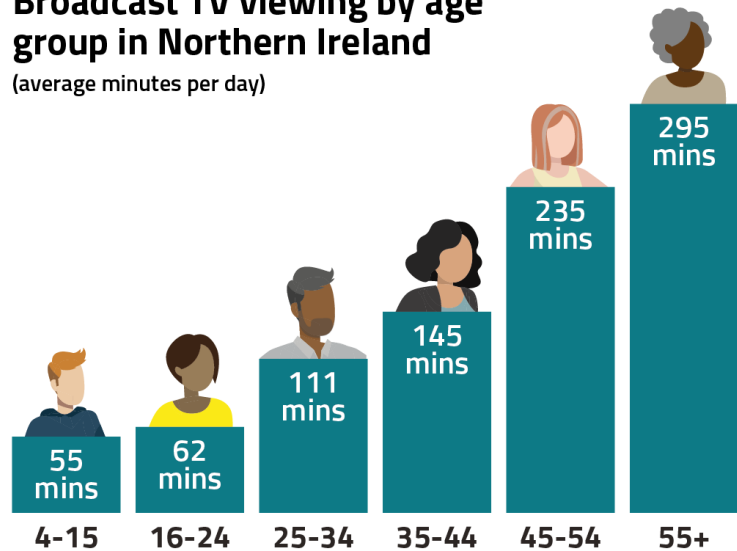
Source: BARB. BBC areas, all individuals (4+).

The biggest decline in broadcast TV viewing was among children

Older age groups watch the most broadcast TV in Northern Ireland. However, viewing among older age groups is declining: those aged 55+ watched 5 hours 4 minutes on average a day in 2018 compared to 4 hours 55 minutes in 2019.

Children’s viewing (4-15 year-olds) declined the most of all age groups, compared to 2018 (24%). And in 2018, children’s viewing in Northern Ireland had also declined by the highest percentage of all age groups. Viewing among 16-24s had also declined by 16 minutes since 2018, falling to 1 hour 2 minutes.¹⁴

Broadcast TV viewing by age group in Northern Ireland (average minutes per day)



¹⁴ Source: BARB. BBC Ulster area, all individuals (4+)

For the second year in a row *Derry Girls* was the most-watched programme in Northern Ireland

Derry Girls was the most-watched show in Northern Ireland in 2019, replicating its 2018 success. The first episode of the second series, which aired on Channel 4 on 5 March 2019, attracted an audience of 573,000 and share of 57% of those watching TV at the time. Northern Ireland was the only nation of the UK not to have a BBC One programme at the top of the most-watched list. Another programme filmed in Northern Ireland – *Line of Duty* – also performed well, with the final episode of season five (potential reveal of ‘H’) coming in at number four.

Figure 6: Top 20 most-watched programmes in Northern Ireland, 2019

Rank	Programme Title	Channel	Date	Average 000s	Share %
1	Derry Girls	Channel 4	05/03/2019	573	57.0
2	I'm A Celebrity Get Me Out Of Here!	UTV	17/11/2019	440	57.4
3	Gavin And Stacey	BBC One	25/12/2019	400	40.4
4	Line Of Duty	BBC One	05/05/2019	313	45.1
5	Coronation Street	UTV	25/12/2019	311	31.2
6	Strictly Come Dancing	BBC One	05/10/2019	306	47.1
7	Rugby: Six Nations Live 2019	UTV	02/02/2019	302	54.3
8	Britain's Got Talent	UTV	04/05/2019	296	45.9
9	Strictly Come Dancing	BBC One	14/12/2019	291	50.4
10	Emmerdale	UTV	31/01/2019	290	47.7
11	Ant & Dec's DNA Journey	UTV	11/11/2019	285	43.3
12	Mrs Brown's Boys	BBC One	25/12/2019	279	38.4
13	Give My Head Peace	BBC One	27/12/2019	275	45.8
14	The Troubles: A Secret History	BBC One	08/10/2019	265	42.7
15	UTV Live News	UTV	04/02/2019	249	45.4
16	Cleaning Up	UTV	09/01/2019	248	34.7
17	Call The Midwife	BBC One	24/02/2019	238	33.0
18	New Year's Eve Fireworks	BBC One	31/12/2019	231	44.3
19	Dancing On Ice	UTV	06/01/2019	228	35.4
20	Seven Worlds, One Planet	BBC One	03/11/2019	227	38.5

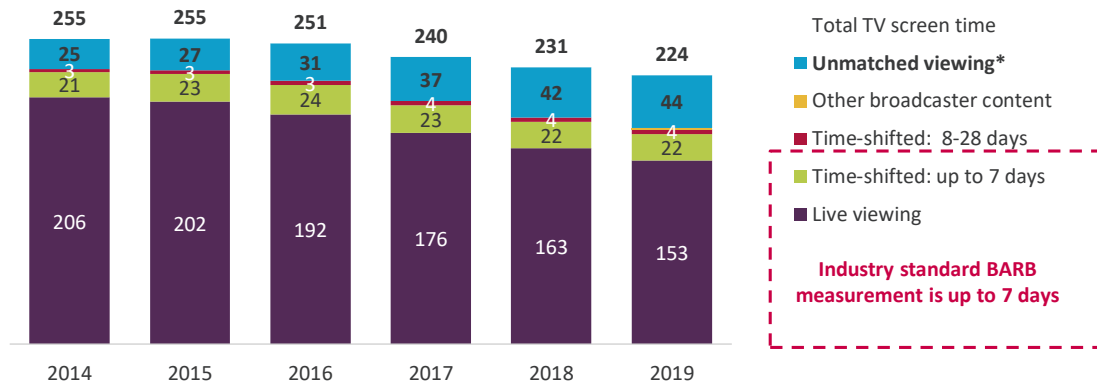
Source: BARB. BBC Ulster area, all individuals (4+)

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, their 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 two minutes a day to an average of 44 minutes per person per day in 2019.

But this increase was not enough to offset the declines in broadcast TV; overall TV screen time in Northern Ireland decreased to 3 hours 44 minutes, a seven-minute decline since 2018.

Figure 7: Average daily minutes of TV screen time in Northern Ireland, per person



Source: BARB. BBC areas, all individuals (4+). Average minutes of viewing/day.

*Unmatched viewing = TV in use but content cannot be audio-matched or otherwise identified. Includes gaming, viewing DVDs, SVoD, YouTube, 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.

**Other broadcaster content = content viewed on measured broadcasters' BVoDs and AVoDs that has not broadcast on linear television channels. For example, BVoD exclusives or historical box sets. Note: this was included within unmatched viewing in previous Ofcom reports.

What is public service broadcasting?

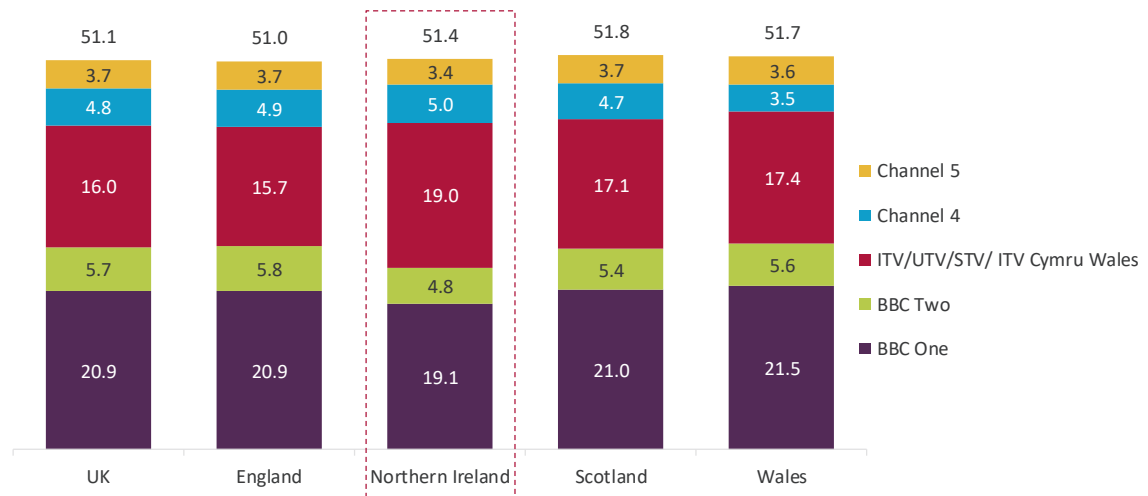
Public service broadcasting (PSB) is provided in Northern Ireland by the BBC, Channel 4, UTV (holder of the Channel 3 licence in Northern Ireland), S4C and Channel 5. While all the BBC TV services are PSB, only the main channels of the other broadcasters are. In return for providing PSB services such 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 account for just over half of broadcast viewing in Northern Ireland

In 2019, the main five PSB channels (BBC One, BBC Two, UTV, Channel 4 and Channel 5) accounted for a combined 51.4% share of total TV viewing in Northern Ireland. This was higher than the England average but below Wales and Scotland. 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.

The PSB share in Northern Ireland has decreased since 2018, when the main five PSBs achieved a share of 52.3%. As in 2018, BBC One and Two have lower viewing shares in Northern Ireland than in any other UK nation.

Figure 8: Percentage share of the total TV viewing in the nations for the five main PSB channels, 2019



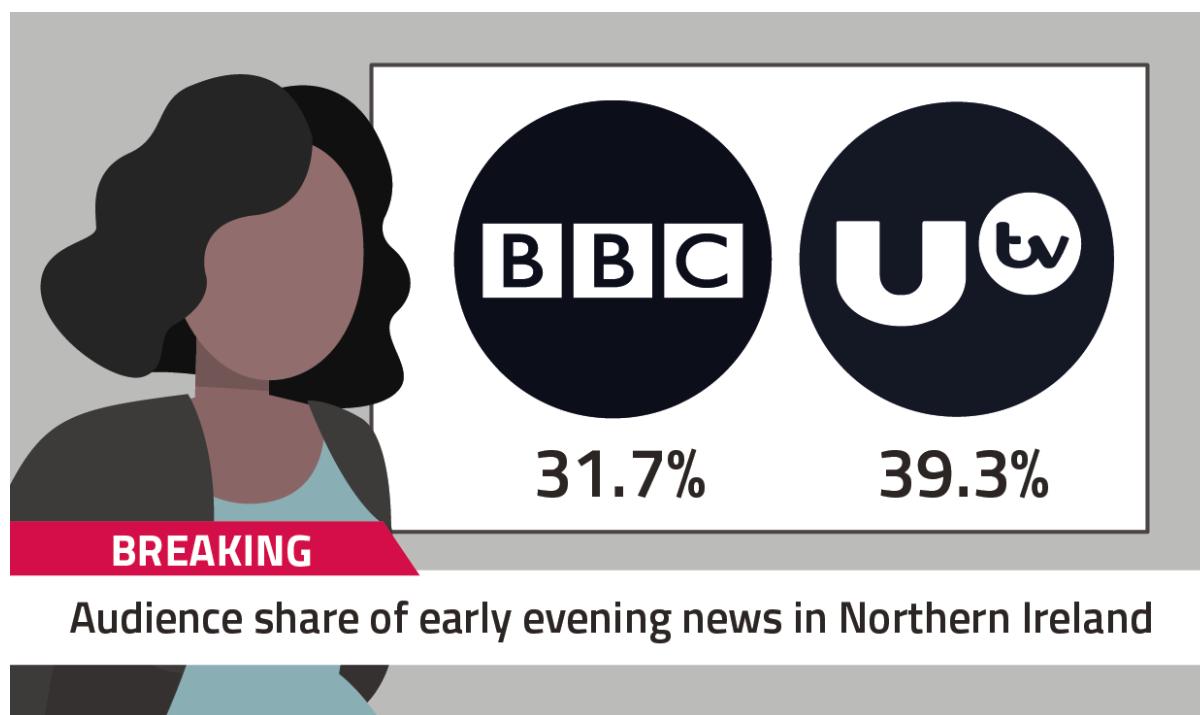
Source: BARB. BBC areas, all individuals (4+). Excludes any plus 1 channels

UTV’s early evening news bulletin continues to attract a greater share in Northern Ireland than the UK Channel 3 average for the same slot

In 2019, UTV’s early-evening news bulletin, UTV Live, attracted a 39.3% average share of viewing in Northern Ireland, higher than the Channel 3 UK average for the early-evening news bulletin slot (23.6%). This was markedly higher than in all other UK nations.

BBC One’s counterpart bulletin in Northern Ireland, *BBC Newslime*, attracted a lower average share (31.7%), largely unchanged since 2018 (31.9%). This is slightly higher than the UK average for the BBC early evening news bulletin (29.3%).

Figure 9: Audience share % of BBC One and UTV early evening news: 2019



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.

Small Screen: Big Debate

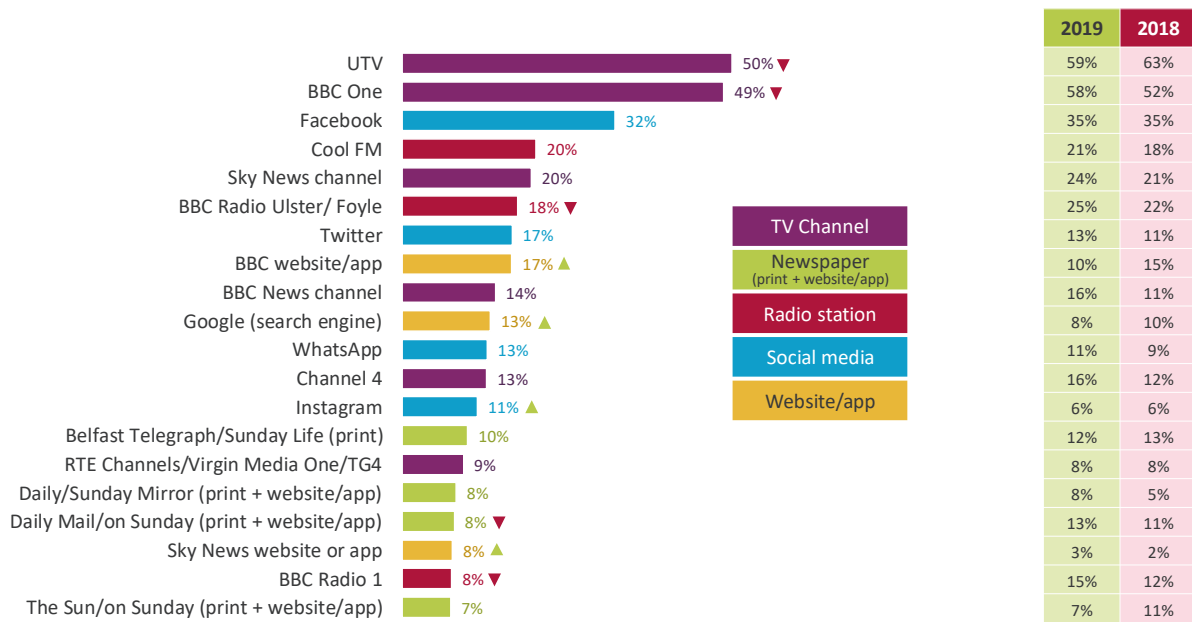
Ofcom has launched *Small Screen: Big Debate* to seek ideas and prompt discussion on how to make sure that the UK has a resilient public service broadcasting system that continues to meet audience needs. To support this, in February 2020 Ofcom published [a five-year review of Public Service Broadcasting](#) from 2014-2018.

We have held public and virtual events in Northern Ireland during the past year to gather views from industry and audiences about the future of public service broadcasting, and we aim to continue our public engagement on this topic over the coming months. There is further opportunity to feed into this project on the [Small Screen: Big Debate website](#) ahead of a consultation being published later in the year.

TV remains the most-used source of news for people in Northern Ireland

UTV and BBC One are the most popular sources of news in Northern Ireland, although their use has declined since last year. Radio Ulster/Foyle has also decreased in use, while the BBC website/app, Google (search engine), Sky News website/app and Instagram have all increased.

Figure 10: Top 20 sources of news in general in Northern Ireland: 2020



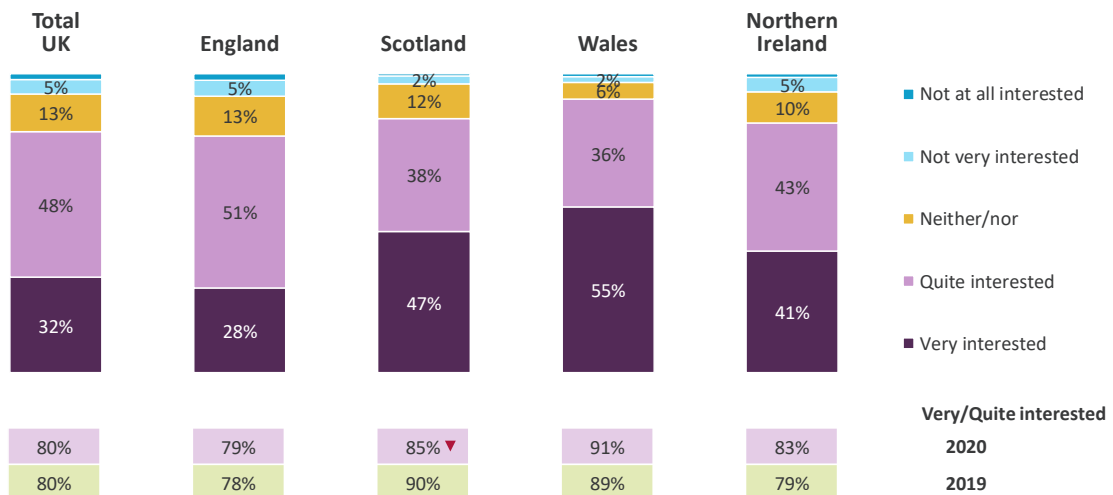
Source: Ofcom News Consumption Survey 2020. Base: All adults 16+ in Northern Ireland – 2020=408, 2019=420, 2018=414. Green/red triangles indicate statistically significant differences between 2020 and 2019.

About 80% of adults in Northern Ireland are interested in news about their own nation

There is a significant amount of interest in news about Northern Ireland by people who live there. Two in five adults who follow news claim to be ‘very interested’ in news about Northern Ireland (41%) and that figure rises to 83% when including those who are ‘very’ or ‘quite’ interested.

As shown below, the responses of people claiming to be ‘very interested’ in news about their nation is greater in Scotland, Wales and Northern Ireland than it is in England.

Figure 11: Level of interest in news about own nation, by nation

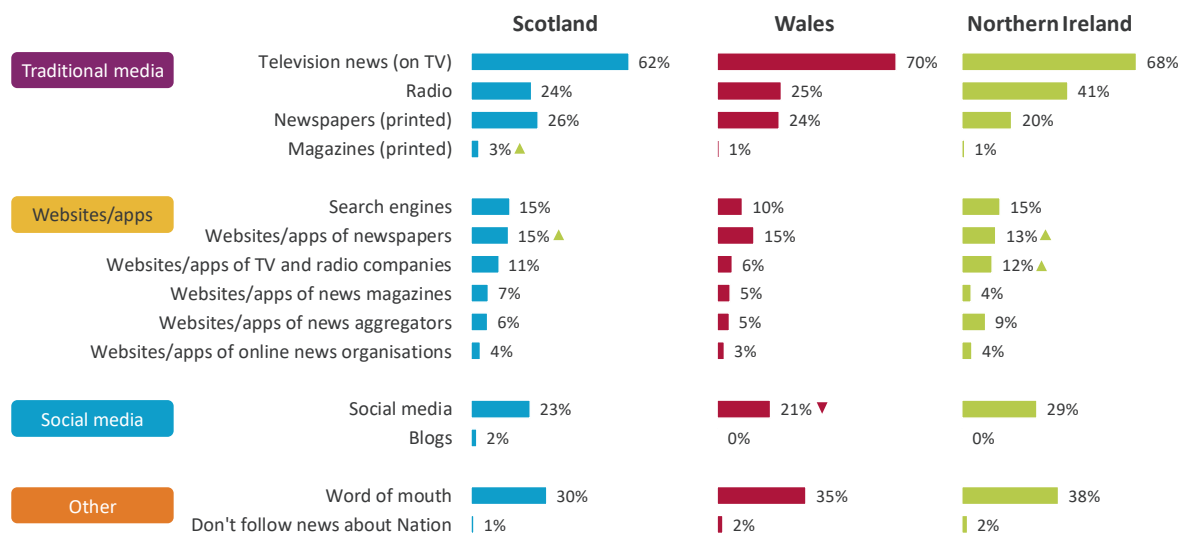


Source: Ofcom News Consumption Survey 2020. Base: All adults 16+ who follow news 2020/2019 – Total=4379/4524, England=3082/3150, Scotland=526/544, Wales=420/435, Northern Ireland=351/395. Green/red triangles indicate statistically significant differences between 2020 and 2019.

Accessing news about their own nation by radio is higher in Northern Ireland than in Scotland or Wales

Television is the most popular way for people to access news about own nation. Four in ten adults in Northern Ireland use radio to get news about their nation, significantly higher than either Scotland or Wales.

Figure 12: Platforms used to access news about own nation, 2020, by nation



Source: Ofcom News Consumption Survey 2020. Base: All adults 16+ who follow news – Scotland=526, Wales=420, N Ireland=351. Green/red triangles indicate statistically significant differences between 2020 and 2019.

UTV and BBC One are the most-used sources of news about Northern Ireland

For news about their own nation, television, social media and radio remain 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 in Northern Ireland, with one in five adults (21%) saying they use the social media platform to get news about their nation. Republic of Ireland TV channels are used by 7% of adults.

Figure 13: Sources used to access news about own nation: 2020

England	%	Scotland	%	Wales	%	Northern Ireland	%
BBC One	38%	STV	34% ↓	BBC One	51%	UTV	47%
ITV	24%	BBC One*	24% ↓	ITV WALES	33%	BBC One	46%
Facebook	15%	BBC Scotland*	18%	Facebook	19%	Facebook	21%
BBC website/app	7%	Facebook	17%	BBC Radio Wales/Cymru	8% ↑	BBC Radio Ulster/Foyle	16%
Twitter	4%	BBC website/app	10%	Local daily newspaper	6%	Cool FM	15%
BBC local/regional radio station	4%	Bauer local commercial radio	9%	BBC website/app	5%	BBC website/app	8% ↑
Google (search engine)	4%	Twitter	6%	South Wales Echo	5% ↓	RTE Channels/Virgin Media One	7%
Sky News Channel	4%	The Daily Record	5%	The Western Mail	4%	Twitter	7%
		Google (search engine)	5%	Wales based news site/app	4%	The Belfast Telegraph	6%
		BBC Radio Scotland	4%			Google (search engine)	5%
		BBC One / BBC Scotland NET	39%			Any NI based news site/app	5% ↑
						Local commercial radio station	4%
Don't follow nation's news	5% ↓	Don't follow nation's news	1% ↓	Don't follow nation's news	3% ↓	Don't follow nation's news	2%

Source: Ofcom News Consumption Survey 2020. Base: All adults 16+ using TV/newspapers/radio/internet/magazine for news – England=3032, Scotland=521, Wales=415, Northern Ireland=346. Only sources with an incidence of 4%+ in each Nation are shown. ↑ and ↓ indicate statistically significant differences between 2020 and 2019. *BBC Scotland new this year. BBC Scotland and BBC One Scotland figures may be affected by respondent confusion about BBC Scotland branding.

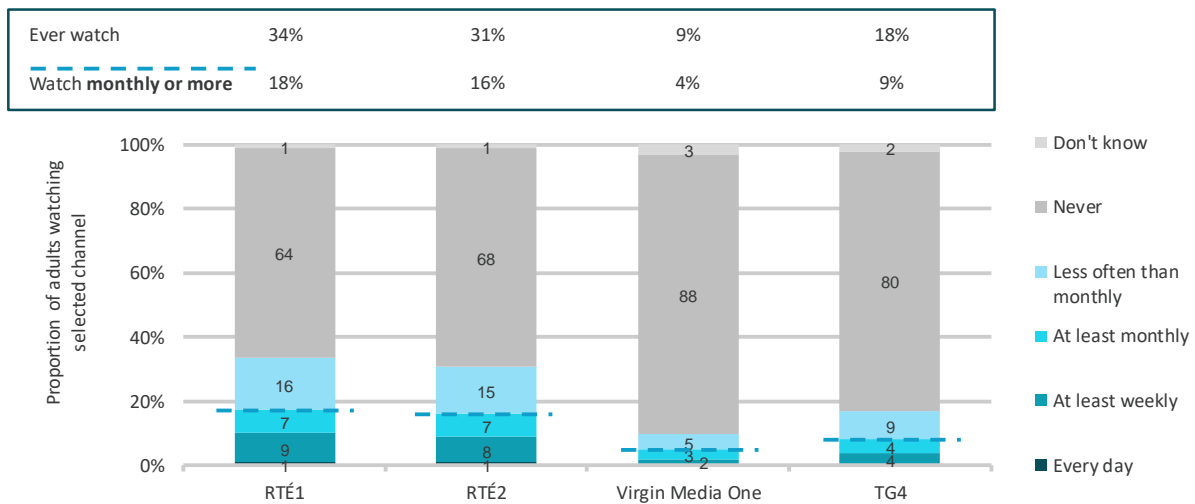
RTÉ channels are watched by around one in ten people in Northern Ireland every week

Republic of Ireland (RoI) 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). Viewers use one of these two platforms depending on where they live.

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.

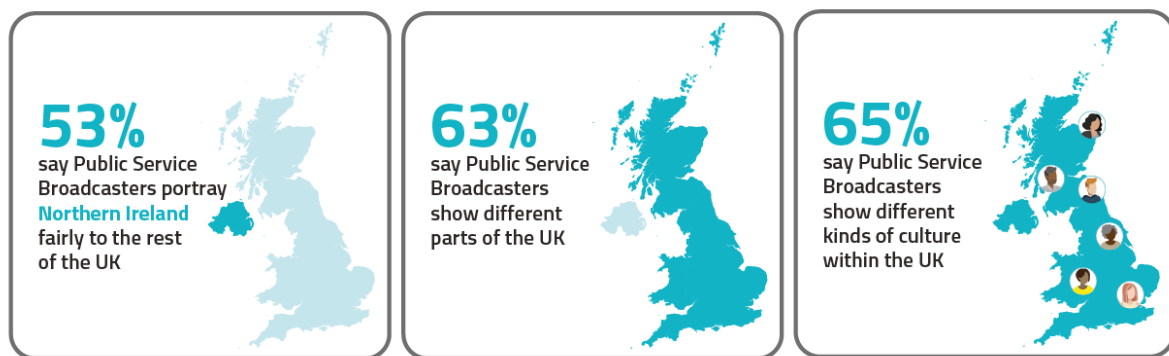
Around one in ten adults in Northern Ireland with a TV in their home claim to watch one of the Irish channels at least weekly.

Figure 14: Claimed viewing of ROI-originated TV channels in Northern Ireland: weekly viewing



Source: Ofcom Technology Tracker 2020. 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 = 514)

How viewers in Northern Ireland rate the public service broadcasters



Source: Ofcom PSB Tracker 2019

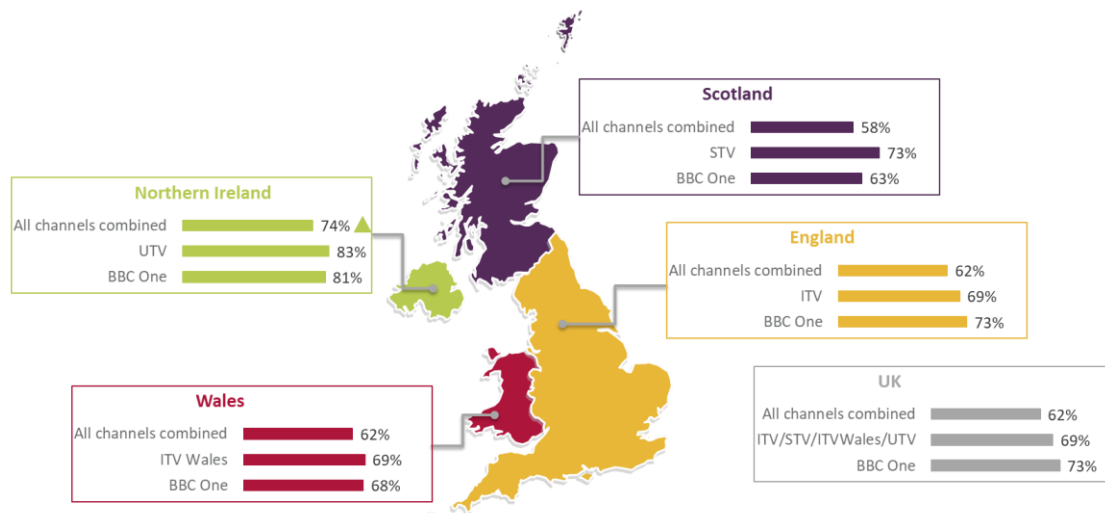
Overall satisfaction with PSB channels has remained unchanged in Northern Ireland since 2018, with just over three-quarters of PSB viewers saying they are satisfied with PSB provision (76% in 2019, 77% in 2018). This is in comparison to 68% in Scotland, 73% in England and 75% in Wales.¹⁵

In 2019, almost three-quarters (74%) of PSB viewers in Northern Ireland were favourable towards the delivery of news provision specifically provided for Northern Ireland, a significant increase on 2018 (65%). Similar levels of satisfaction were observed for UTV (83%) and BBC One (81%). Both these ratings remain higher than those in the other nations, again demonstrating that Northern Irish audiences are the most satisfied with their regional news provision.¹⁶

¹⁵ Ofcom PSB Tracker 2019

¹⁶ Ofcom PSB Tracker 2019

Figure 15: Provision of high-quality news within nation, by provider (7-10 rating)



% Rating for delivery 10/9/8/7

Source: Ofcom PSB Tracker 2019. 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 = UK: 2062; Eng: 1443; Scot: 208; Wales: 214; Northern Ireland: 197), (ITV1 = UK: 1774; Eng: 1224; Scot: 173; Wales: 188; Northern Ireland: 189). Base for 'All channels combined': All respondents who ever watch any PSB channels in each nation (UK: 2993; Eng: 2103; Scot: 303; Wales: 294; Northern Ireland: 293)

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.

There was an 18% increase in spending on first-run content for viewers in Northern Ireland in 2019, with the majority of this £32.9m spend going towards non-news/non-current affairs programming.

BBC hours of first-run content in Northern Ireland increased by 8% in 2019 to 604 hours. Overall, news content dominates the BBC's output for Northern Ireland, comprising over half (54%) of first-run hours.

Northern Ireland is also an important source of production for PSB content shown across the UK. Some 2% of qualifying network spend on the PSB channels was on Northern Ireland-based productions in 2019.

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 2019 terms.

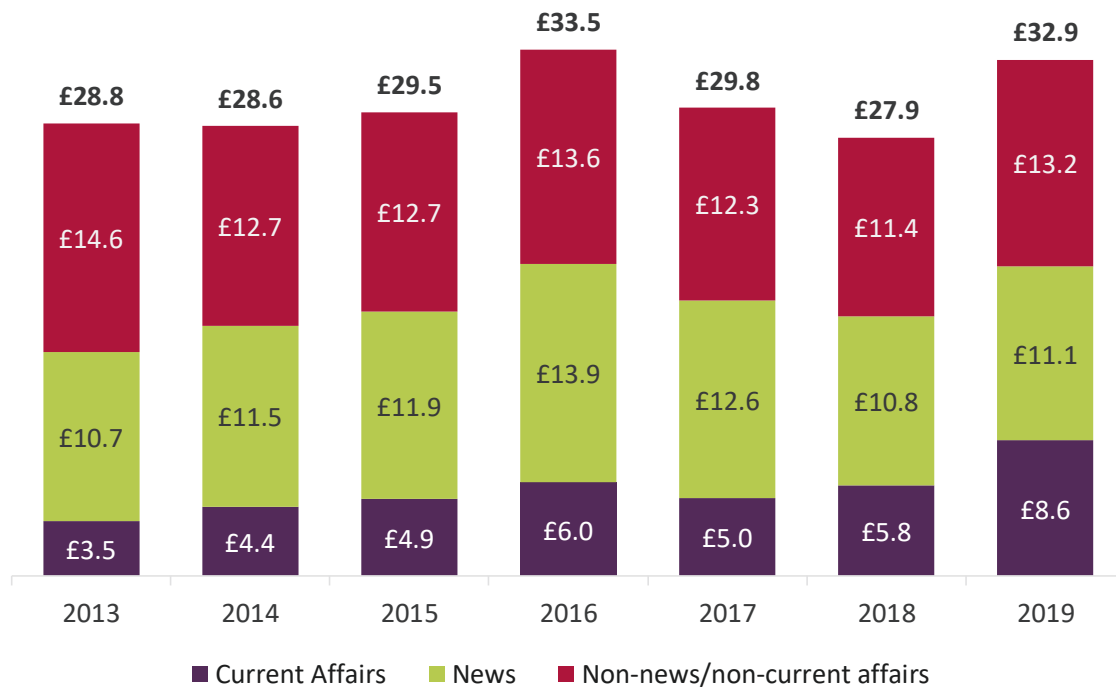
PSB spend on first-run content for Northern Ireland increased across all genres in 2019

There was an 18% increase in spending on first-run content for viewers in Northern Ireland in 2019. Of this £32.9m spend, the majority went towards non-news/non-current affairs programming, at £13.2m; a year-on-year increase of 16%. The increase in spend of other genres brings to an end the steady decline in recent years.

Current affairs had the largest relative increase in first-run spend, increasing by 48% year on year to a record high of £8.6m.

PSB spend on news programming for Northern Ireland reached one of its lowest levels in 2018, but this year has seen a slight increase (3%).

Figure 16: PSB spend on first-run UK-originated content for Northern Ireland, by genre (£m)



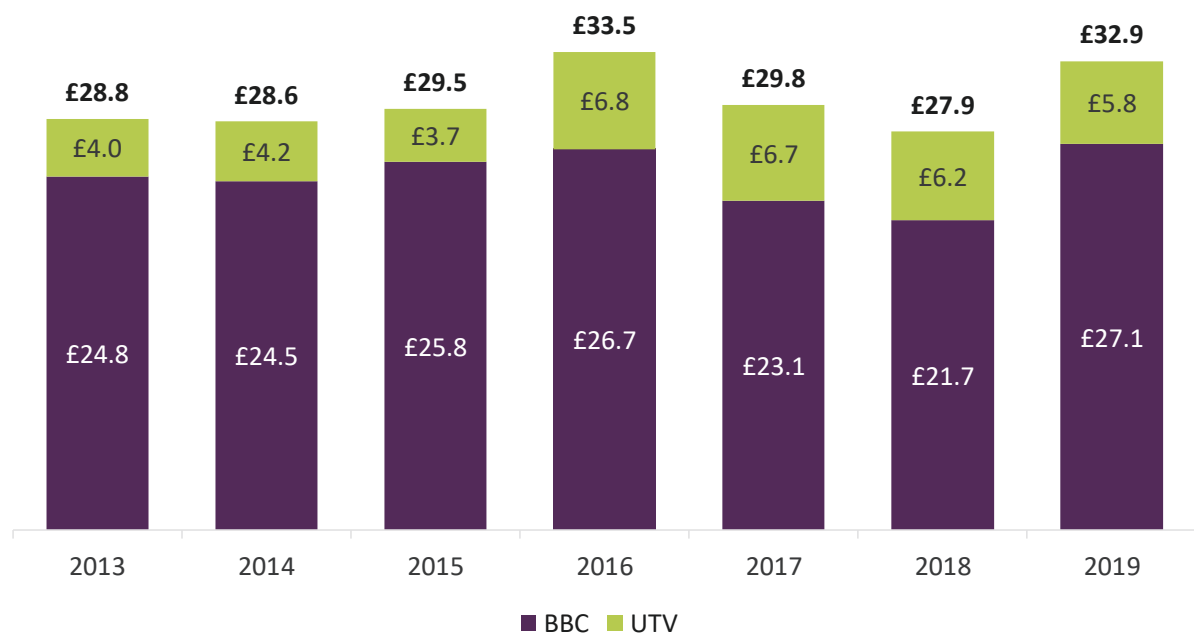
Source: Ofcom/broadcasters. Note: Figures are expressed in 2019 prices.

PSB spend on first-run content for Northern Ireland rose in 2019, ending the two-year decline in spend

The increase in spend on first-run content is from the BBC, whose spend for Northern Ireland increased by 25% since 2018. In monetary terms, this is an increase of £5.4m to a high of £27.1m, the highest level of BBC first-run spend since 2013 in real terms.

In contrast, spend by UTV on first-run content for Northern Ireland declined in 2019, down by 6% and dropping below £6m for the first time since 2015.

Figure 17: BBC and UTV spend on non-network first-run UK-originated content for Northern Ireland (£m)



Source: Ofcom/broadcasters. Note: Figures are expressed in 2019 prices

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 its 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, 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.

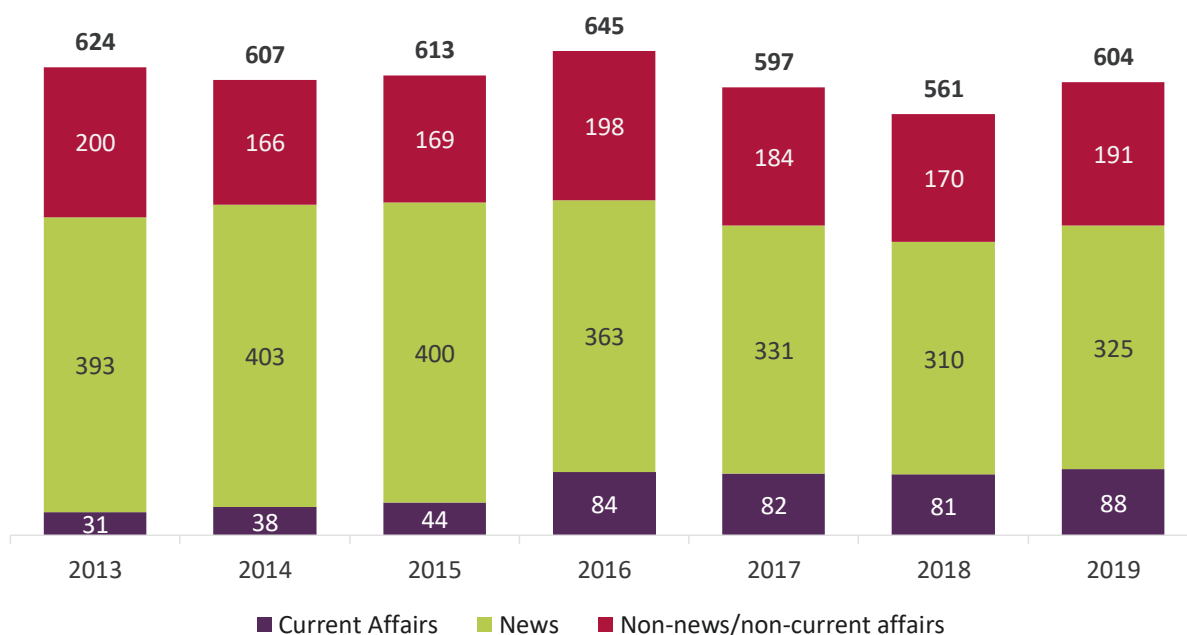
BBC hours of first-run content in Northern Ireland increased by 8% in 2019 to 604 hours

The increase in hours has been across all genres, with current affairs and news programming increasing by 7 hours (9%) and 15 hours (5%) respectively.

The largest increase has been across the variety of other genres in which the BBC produces content for Northern Ireland, increasing by 21 hours to reach 191 hours (12%).

Overall, news content dominates the BBC’s output for Northern Ireland, comprising over half (54%) of first-run hours.

Figure 18: BBC hours of first-run UK-originated content for Northern Ireland, by genre

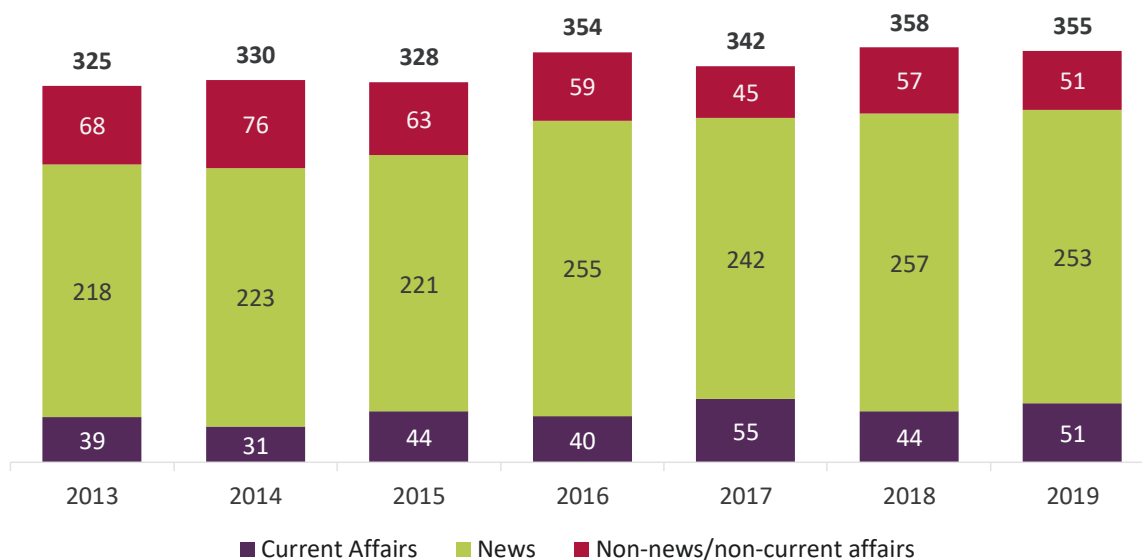


Source: Ofcom/broadcasters.

UTV hours of first-run content for Northern Ireland have remained stable since 2016, with 355 hours of programme output in 2019

The vast majority of UTV output is news content, comprising 71% (253 hours) of first-run programming on the channel. Current affairs, and the variety of other genres on the channel, account for 51 hours respectively.

Figure 19: UTV hours of first-run UK-originated content for Northern Ireland, by genre



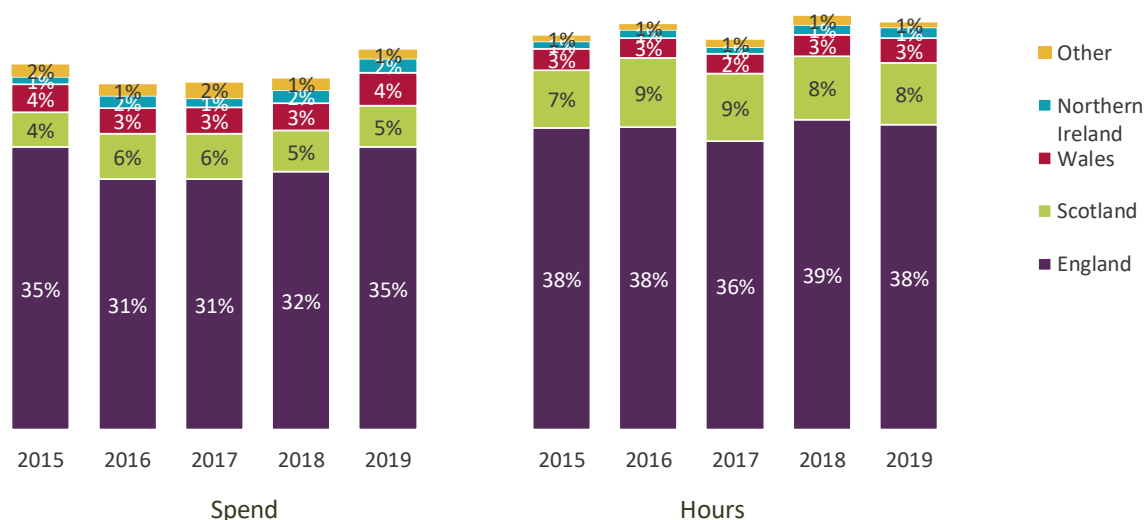
Source: Ofcom/broadcasters.

Network content produced in Northern Ireland

Public service broadcasters must make programmes in a range of places around the UK that are broadcast for the first time on their network TV channels. The broadcasters have quotas relating to this, in terms of the proportion of qualifying hours and the proportion of qualifying spend that must be outside London. The BBC has individual quotas for each of the UK nations, and Channel 4 also has an out-of-England quota. ITV and Channel 5 are not specifically required to make content outside England.

Across all the PSBs, 2% of qualifying first-run network spend was allocated to programmes qualifying as Northern Ireland productions, and 1% of hours. The proportion of qualifying spend in Northern Ireland remains lower than for the other nations but has been increasing, primarily due to the BBC.

Figure 20: Proportion of qualifying network hours and spend outside London, all PSBs combined: 2015-2019



Source: Broadcasters / Ofcom

The BBC has increased the proportion of its network content made in Northern Ireland

The BBC increased the proportion of its network spend in Northern Ireland to 3.5% in 2019, and the proportion of hours also increased, to 2.7%. The BBC continues to make drama series in Northern Ireland, including *Line of Duty*, the fifth series of which was broadcast in 2019. Filming in Belfast for the sixth series of the drama was due to conclude in May 2020 but was paused after 4 weeks, in March 2020, due to the coronavirus.

The BBC's *Mastermind* is now produced from Northern Ireland, moving from Salford in 2019, adding to the range of titles produced in the nation.

Figure 21: Proportion of qualifying network production in Northern Ireland, by PSB: 2015-2019

		2015	2016	2017	2018	2019
BBC	Spend (%)	1.8	3.1	2.4	3.1	3.5
	Hours (%)	1.8	2.1	1.9	2.4	2.7
ITV	Spend (%)	0.4	0	0	0.3	0.1
	Hours (%)	0.1	0	0	0.1	0.04
Channel 4	Spend (%)	0.3	0.5	0.5	1.1	1.0
	Hours (%)	0.3	0.5	0.7	1.1	0.5
Channel 5	Spend (%)	0	0.9	0.2	0.4	0.1
	Hours (%)	0	0.3	0.1	0.2	0.2

Source: Broadcasters / Ofcom.

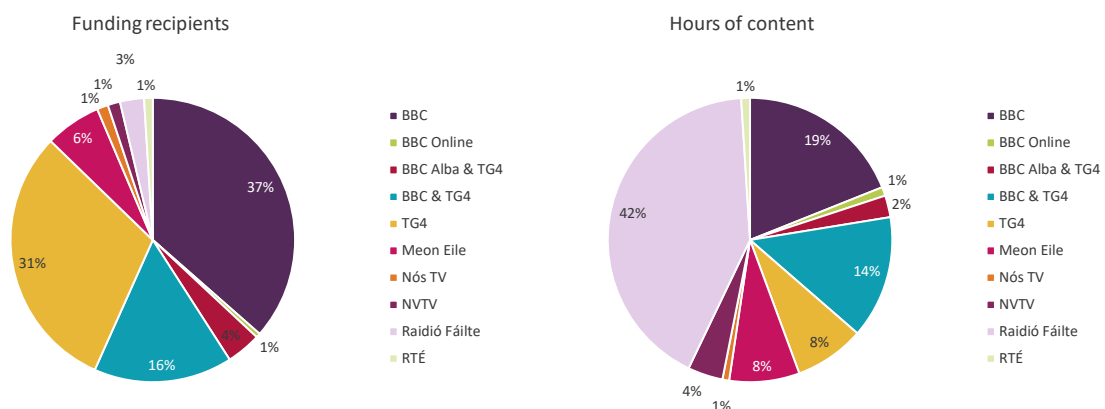
The Irish Language Broadcast Fund provided £2.75m in funding in 2019-2020

Managed by Northern Ireland Screen, the Irish Language Broadcast fund (ILBF) continued to fund a broad range of Irish-language content in 2019/20, 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 *Lomax in Éirinn*, a winner of Spirit of the Festival at the Celtic Media Festival and Programme of the Year at the Oireachtas Communication Awards in 2019.

Figure 22: ILBF funding recipients / hours: 2019-2020



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.

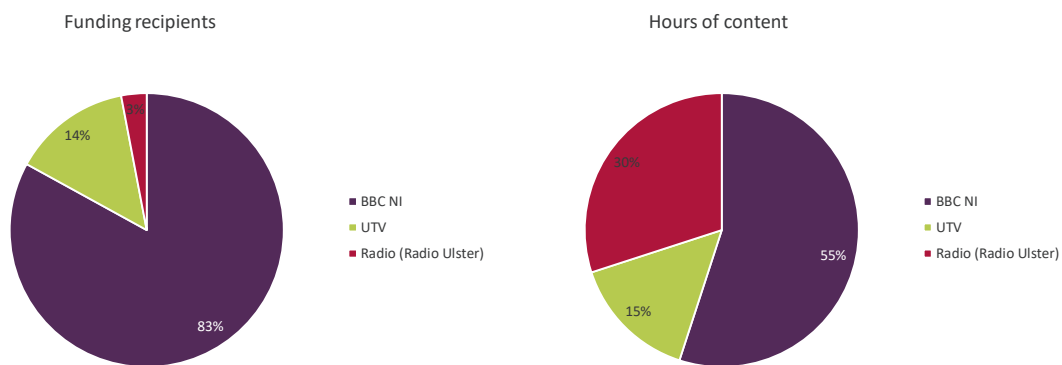
The Ulster-Scots Broadcast Fund provided £0.7m in 2019-20

Eight projects received funding for the Ulster-Scots Broadcast Fund (USBF) in 2019-20. Of this funding, 85.7% went to programming across the BBC, whether through BBC Northern Ireland (83%) or BBC Radio Ulster (2.7%). The remaining 14.3% went towards programming for UTV.

USBF-funded content over the period ranged from factual/entertainment programming to documentaries and radio content. Commissioned highlights include the dramatised radio reading of the iconic novel *Across the Narrow Sea* by Sam Hanna Bell, the third series of the factual/entertainment series *Hame* and the ten-part series *Lough Foyle* in which viewers will explore the towns and villages along the River Foyle.

Broadcast highlights include the second series of the living history programme *Family Footsteps* and *Singing the Messiah*, which follows a local community choir as they prepare for a unique music project – a Christmas performance of Handel’s *Messiah* in Ulster-Scots.

Figure 23: USBF funding recipients / hours: 2019-2020



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 continues to be popular with people in Northern Ireland: more than nine in ten adults listen every week. And alongside TV screen viewing and online activities, radio continues to account for a considerable amount of time spent consuming media services, with listeners tuning in for an average of more than 19 hours each week.

As in previous years, the popularity of local rather than national stations continues to be a feature of the Northern Ireland market.

Local stations – including Cool FM, Downtown, Downtown Country, U105, the Q Network and Radio Ulster/Foyle – accounted for 59% of listening in Northern Ireland, far higher than their counterpart stations in Scotland and Wales.

Digital radio listening continued to grow, rising 3.5pp to 43% (Q1, 2020) but remains significantly below the other UK nations. Indeed, Northern Ireland is the only nation of the UK where the majority of listening is still via analogue means.

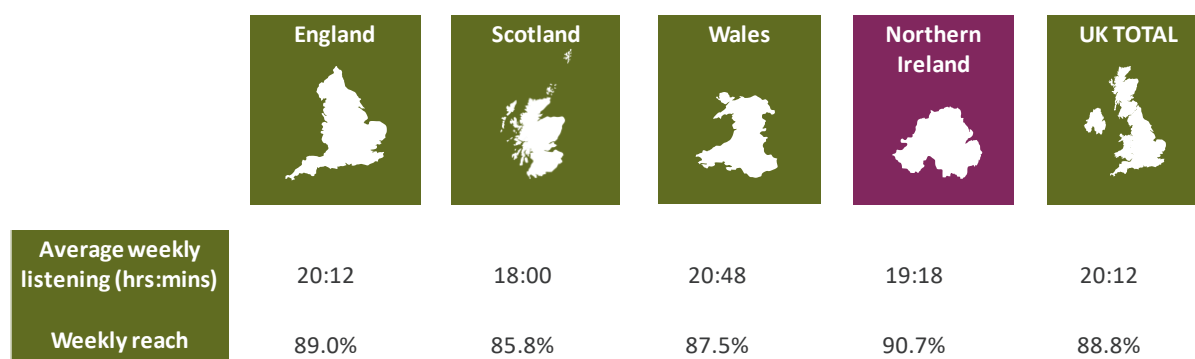
Radio listening figures in this section are for Q1 2020 and only cover a small portion of the Covid-19 lockdown period. As mentioned earlier this report, radio stations played a key role in keeping people informed and entertained through the peak lockdown months of April, May and June.

Radio listening in Northern Ireland

On average, more than 90% of Northern Ireland adults listened to radio each week in Q1 2020

Adults in Northern Ireland listened to radio for an average of 19 hours 18 minutes every week. This represents an increase on 2019 (18hrs 54mins), with more than nine in ten adults listening to live radio every week.

Figure 24: Average weekly reach and listening hours



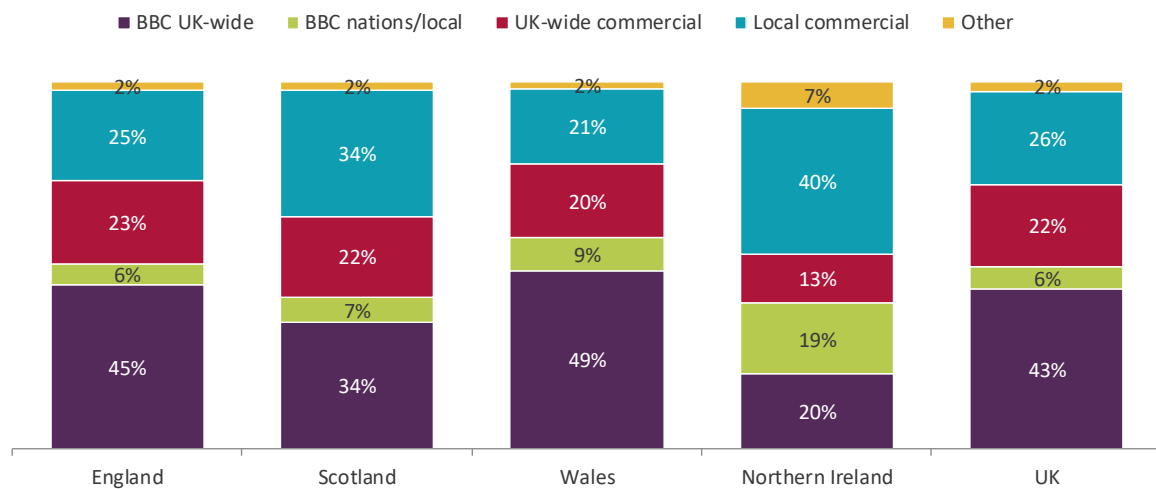
Source: RAJAR, All adults (15+), Q1 2020. England = BBC Local Radio in England TSA; Scotland = BBC Radio Scotland TSA; Wales = BBC Radio Wales TSA; Northern Ireland = BBC Radio Ulster TSA. Reach is defined as a percentage of the area's adult population who listen to a station for at least 5 minutes in the course of an average week

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

Northern Ireland continues to have a distinct radio landscape with listeners preferring local rather than national stations.

Local radio, whether from commercial broadcasters or the BBC, accounted for 59% of all listening in Q1 2020. This was considerably higher than in the UK (32%), England (31%), Scotland (41%) or Wales (30%). In contrast, people in Northern Ireland listen to less UK-wide BBC and commercial stations. At 7%, listening to 'other', which includes Republic of Ireland and local community radio stations, is higher in Northern Ireland than in other nations.

Figure 25: Share of listening hours, by nation

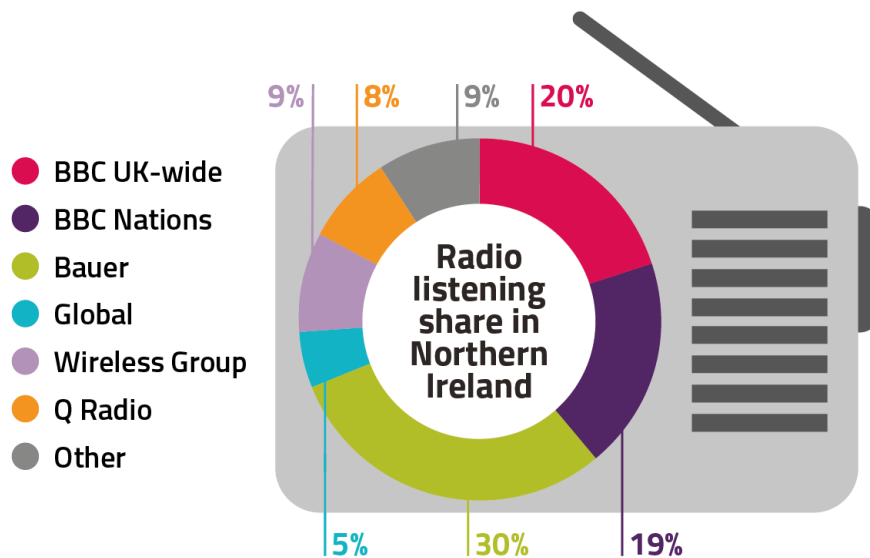


Source: RAJAR, all adults (15+), Q1 2020. England = BBC Local Radio in England TSA; Scotland = BBC Radio Scotland TSA; Wales = BBC Radio Wales TSA; Northern Ireland = BBC Radio Ulster TSA.

Bauer-owned stations accounted for nearly a third of all listening in Northern Ireland in Q1 2020

Within Northern Ireland, the BBC had a 39% share of the radio market in Q1 2020. Of the commercial radio groups, Bauer Radio – which owns Cool FM, Downtown and Downtown Country – had the largest single share of the market, at 30%, followed by Wireless Group, owner of U105, with 9%, and the Q Radio network with an 8% share.

Figure 26: Share of listening in Northern Ireland, by radio group



Source: RAJAR, All adults (15+), Q1 2020, BBC Radio Ulster TSA

Cool FM was the most popular radio station in Northern Ireland in Q1 2020

Bauer-owned Cool FM was the most popular station across Northern Ireland in Q1 2020, reaching 35% of adults (2019=31.6%). That put it ahead of BBC Radio Ulster on 34% (32.4%), which also increased its reach on the previous year. Q Radio too increased its reach in Q1 2020, to 20% of adults, compared to 17.9% in 2019. Local radio stations dominate the reach rankings in Belfast and across Northern Ireland. In Belfast, U105 has the third highest reach of any radio station at 22%.

Figure 27: Top three radio stations, by region

Rank	UK		Northern Ireland*		Belfast**	
	Station	Weekly reach (%)	Station	Weekly reach (%)	Station	Weekly reach (%)
1	BBC Radio 2	26%	Cool FM	35%	Cool FM	42%
2	BBC Radio 4	20%	BBC Radio Ulster	34%	BBC Radio Ulster	33%
3	BBC Radio 1	16%	Q Radio	20%	U105 (Greater Belfast)	22%

Source: RAJAR, All adults 15+, Q1 2020. * BBC Radio Ulster TSA. ** U105 TSA (Greater Belfast)

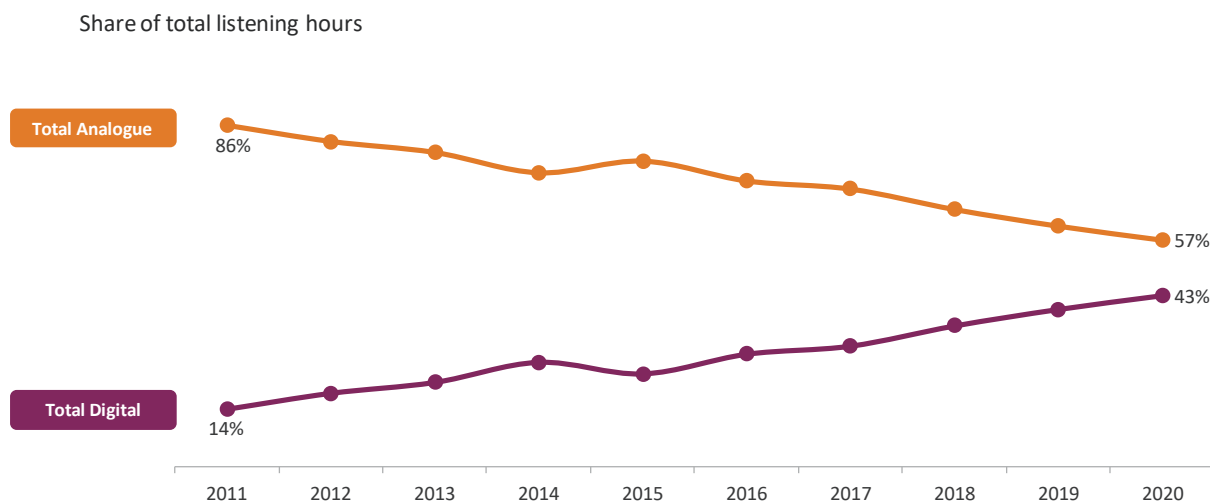
Digital listening in Northern Ireland

Listening to radio through a digital device is growing in Northern Ireland but continues to lag behind other UK nations

In Northern Ireland, there was a year-on-year increase of 3.5pp in the share of radio listening to digital radio (DAB, digital television and online (including smart speakers)) to 43% of all listening at

the start of 2020.¹⁷ Northern Ireland is the only nation of the UK where the majority of listening is still via analogue means.

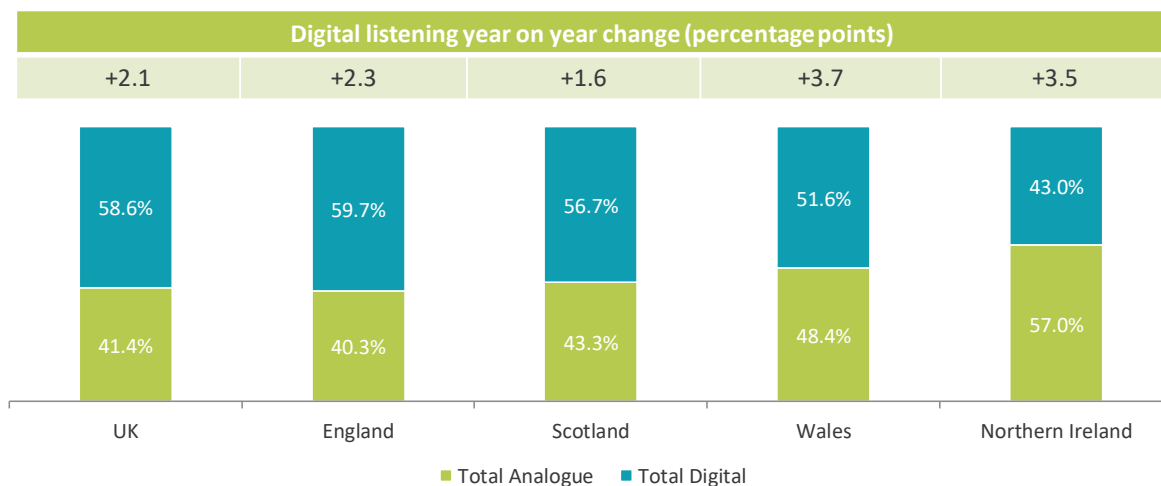
Figure 28: Share of listening hours via digital and analogue platforms in Northern Ireland: 2011-2020



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

The proportion of time spent listening to radio through a digital platform in Northern Ireland (43%) remains far lower than in the other UK nations: England (59.7%), Scotland (56.7%) and Wales (51.6%). Five years ago (Q4, 2014), digital accounted for just 25% of total listening in Northern Ireland.

Figure 29: Share of listening hours via digital and analogue platforms



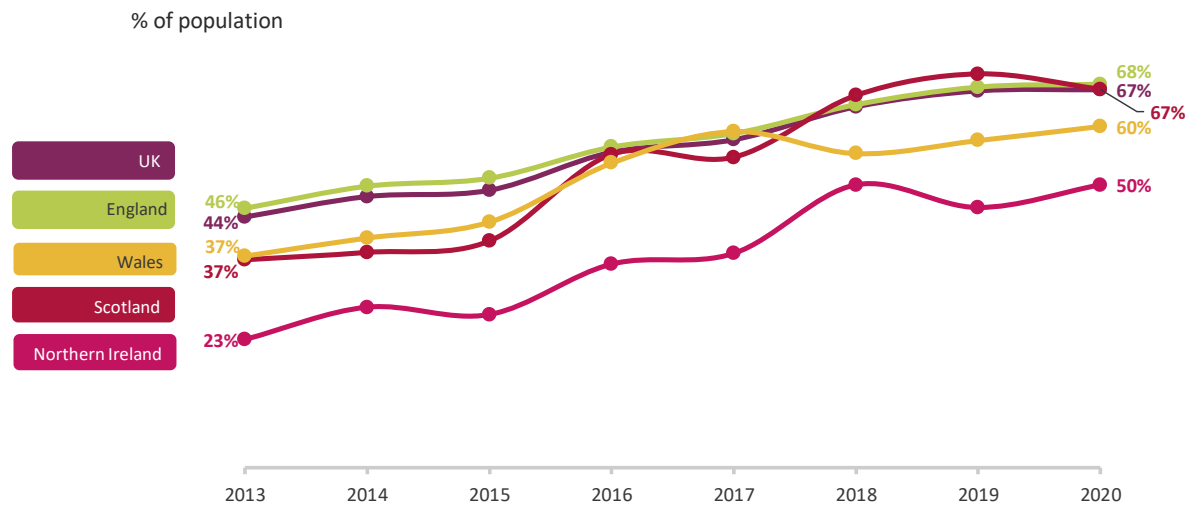
Source: RAJAR, All adults (15+), Q1 2020; within the BBC Radio TSA for each nation

¹⁷ DAB radio set, digital television and the internet

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

Half of adults Northern Ireland (50%) owned a DAB radio in Q1 2020. This remains significantly lower than across the UK as a whole (67%), Scotland (67%) and Wales (60%).

Figure 30: DAB ownership



Source: RAJAR, All adults 15+, Q1 in each year England = BBC Local Radio in England TSA; Scotland = BBC Radio Scotland TSA; Wales = BBC Radio Wales TSA; Northern Ireland = BBC Radio Ulster TSA.

Ofcom sets out licensing plans for small-scale DAB radio

Small-scale DAB will expand local digital radio coverage and ensure that listeners will be able to tune into a diverse range of radio services across the UK on the digital audio broadcasting platform.

This platform uses freely available software and computer technology to transmit digital radio services and broadcast them to a relatively small geographic area. It allows stations to use inexpensive equipment to get on air for far less money than was previously possible.

Ofcom will advertise multiplex licences for small-scale DAB in batches, starting in September 2020 with 25 local areas across the UK, including Derry/Londonderry.

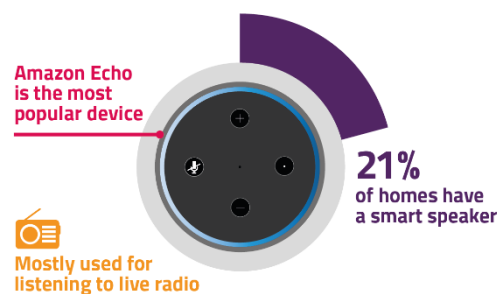
Community radio applications, in the form of the new Community Digital Sound Programme ('C-DSP') licences, will open for each local area at the same time as the publication of multiplex licence advertisements.

Small-scale DAB will give community radio, smaller commercial radio stations and new entrants an affordable pathway to terrestrial digital radio, ensuring the continued availability of a diverse range of radio services across the United Kingdom, on a platform which accounts for an increasing amount of radio listening.

Audio trends

Smart speakers are in around one in five Northern Ireland homes

A significant amount of new digital listening is done through smart speakers: about one in five homes in Northern Ireland have them (21%). The Amazon Echo is by far the most popular type (found in 81% of homes in Northern Ireland that have a smart speaker).



The most popular reasons given by users in Northern Ireland for using smart speakers were to listen to a live radio station (67%) or to get weather information (62%). These were followed by around half of users searching for general information (51%) or getting news reports (47%).¹⁸

¹⁸ Ofcom Technology Tracker 2020

The UK government's digital radio and audio review

The Department for Digital, Culture, Media & Sport (DCMS) has announced a review of digital radio and audio to ensure that radio is fit for the future, given changing listener trends. The review will:

- assess future scenarios for the consumption of UK radio and audio content on all radio and online platforms, and assess the impact of these scenarios on access to UK radio services;
- assess the impact of likely models of future listener trends on current and future distribution strategies for UK radio groups and industry; and
- make recommendations on further measures and collaborative actions to strengthen the UK radio and audio industry for the benefit of all listener groups and to promote innovation.

DCMS expects to publish its report on this by March 2021.

One in eight adults in Northern Ireland listen to podcasts each week

One in eight adults in Northern Ireland (13%) listen to podcasts each week; 2% do so daily.¹⁹ More than four in ten (43%) podcast listeners²⁰ use their mobile phone for this audio activity, with half of this proportion using a smart speaker (23%).²¹

Among podcast listeners in NI there is little difference in the proportions listening to different types of podcasts. Almost half (47%) listen to catch-up versions of BBC radio programmes such as *Desert Island Discs*, while 43% listen to podcasts linked to TV programmes, non-BBC radio stations (40%) such as *The Frank Skinner Show*, podcasts made by newspapers or magazines (36%), and podcasts that have video versions (33%) such as TED talks.²² Other podcasts from the BBC²³ are less popular (30%).

¹⁹ RAJAR Q1 2020, UK

²⁰ Note that the sample size for podcast listeners in Northern Ireland is below 100, therefore the data is indicative only and should be treated with caution

²¹ Ofcom Technology Tracker 2020

²² Note there are no statistically significant differences among this data

²³ Other podcasts from the BBC are those that were not originally broadcast on radio and not linked to TV programmes