

2 Television and audio-visual content

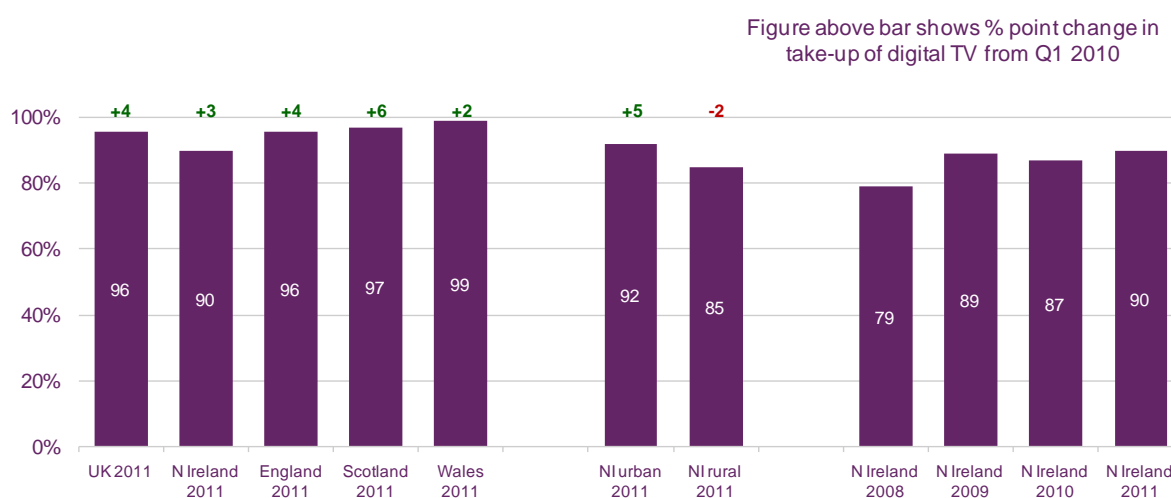
2.1 Digital television take-up in Northern Ireland

Nine in ten TV homes in Northern Ireland now have digital television

A year ahead of digital switchover taking place in Northern Ireland, 90% of homes with a TV have access to a digital television service. This is lower than the UK average (96%), but Northern Ireland is the only UK nation where digital switchover yet to begin (it takes place in 2012).

Consumers in Northern Ireland who are aged 55+ (78%) and in DE socio-economic groups (79%) are less likely to have converted to digital television at home.

Figure 2.1 Digital television take-up in Northern Ireland



Source: Ofcom research, Q1 2011

Base: All adults aged 16+ with a TV in household (n = 3412 UK, 509 Northern Ireland, 1941 England, 479 Scotland, 483 Wales, 257 Northern Ireland urban, 252 Northern Ireland rural, 626 Northern Ireland 2008, 640 Northern Ireland 2009, 746 Northern Ireland 2010, 509 Northern Ireland 2011)

QH1a. Which, if any, of these types of television does your household use at the moment?

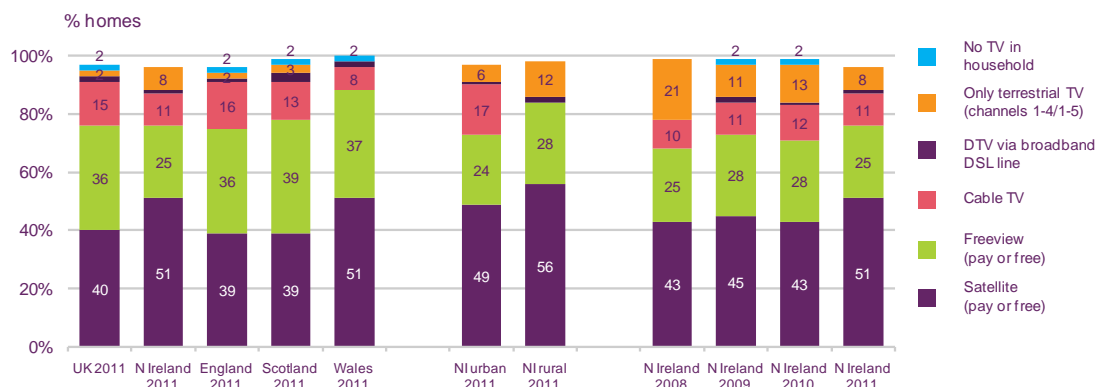
Over half of all homes in Northern Ireland have a satellite TV service

The mix of platforms used to view digital television has changed a little in the past year in Northern Ireland, with the proportion using satellite (either pay or free service) increasing by eight percentage points to 51%. Further, the proportion of analogue-only homes has fallen from 13% in quarter 1 2010 to 8% in quarter 1 2011. There are indications that a small proportion of consumers in Northern Ireland have switched from terrestrial to satellite in the last year.

The mix of TV platforms used in rural areas of Northern Ireland is different to that in urban centres, with a higher proportion of households having either satellite (56%) or terrestrial (12%) on their main set, due to the lack of cable availability in these areas.

Sixty-six per cent of adults with a TV at home in Northern Ireland have a pay-TV service, which is an increase of eleven percentage points since Q1 2010, and the highest across the nations.

Figure 2.2 Main set TV share in Northern Ireland, by platform



Source: Ofcom research, Q1 2011

Base: All adults aged 16+ (n = 3474 UK, 511 Northern Ireland, 1983 England, 487 Scotland, 493 Wales, 259 Northern Ireland urban, 252 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011)

QH1a. Which, if any, of these types of television does your household use at the moment?

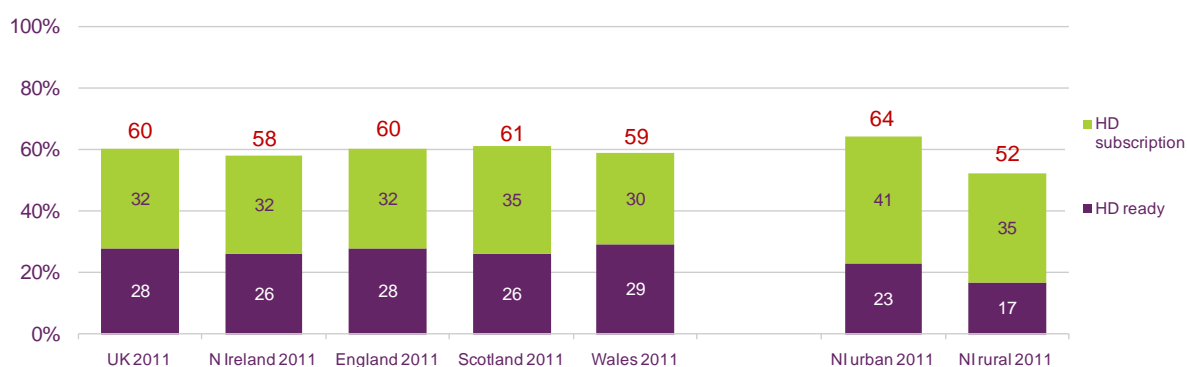
2.2 Access to high-definition TV

One in three homes in Northern Ireland claim to have HDTV channels

Fifty-eight per cent of homes in Northern Ireland have an HD-ready TV set, and over half of these also claim to have access to HDTV channels (via cable, satellite or DTT). This equates to 32% of homes in Northern Ireland having access to HDTV channels, which is on a par with the UK average (32%). This figure may be prone to over-claim, as some consumers may believe that having an HD-ready TV set means that HD channels are being received².

² We have removed the Northern Ireland respondents who said they have an HD service via the Freeview platform, due to this service not yet being available in Northern Ireland.

Figure 2.3 Proportion of homes with HD-ready TV sets and HDTV



Source: Ofcom research, Q1 2011

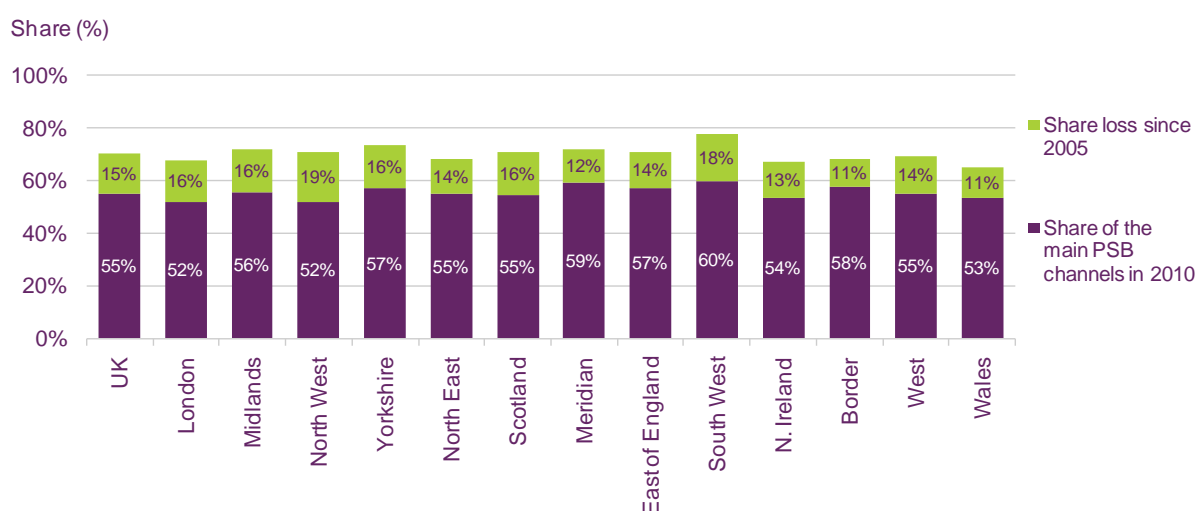
Base: All adults aged 16+ (n = 3474 UK, 511 Northern Ireland, 1983 England, 487 Scotland, 493 Wales, 259 Northern Ireland urban, 252 Northern Ireland rural)

QH53. Is the main TV in your household an HDTV set or HD ready?/ QH54. For the main TV set, does your household have an HD TV service – from either Sky, Virgin Media, Freesat or Freeview?

2.3 Broadcast television viewing

In Northern Ireland, there was a 13 percentage point (pp) reduction in the combined share of viewing of the five main PSB channels over five years (falling to 54% in 2010). This reduction was less than the average decrease across the UK (15pp). However, despite the relatively smaller decline in share over this period, the five PSB channels' combined share in Northern Ireland in 2010 was still less than the corresponding UK average (54% vs. 55%).

Figure 2.4 Reduction in combined share of the five PSB channels, all homes: 2005 and 2010

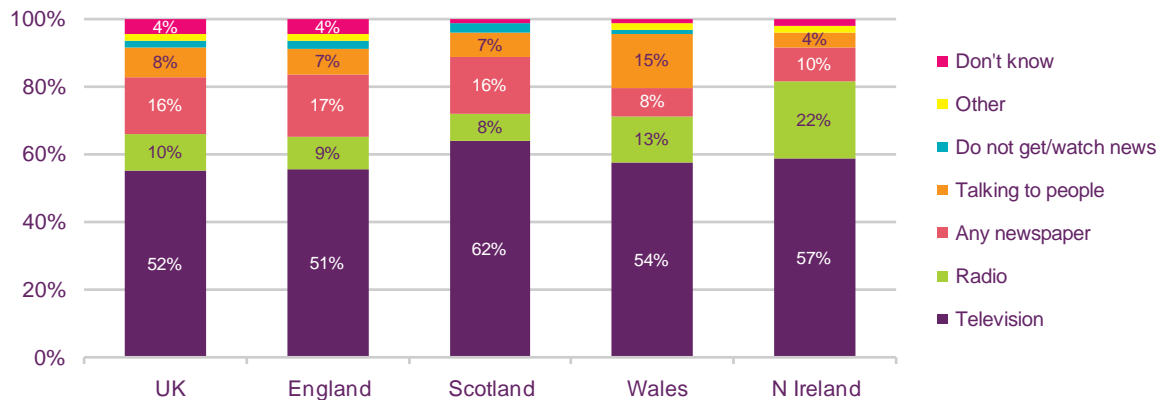


Source: BARB

Radio is main source of local news for one in five adults in Northern Ireland

In 2010, 57% of adults in Northern Ireland said that TV was their main source of local news, higher than the UK average of 52%. Radio was the second most mentioned, by 22%, which is significantly higher than the UK average (10%). Northern Ireland and Wales were the only two nations in which adults go to the radio ahead of newspapers for local news.

Figure 2.5 Sources of local news in each nation, 2010



'Can you tell me what, if anything, is your main source of news about what is going on in your own local area?'

Source: Ofcom Media Tracker Survey 2010

Base: All adults 15+. n = 2,141 (UK), 1,726 (England) 194 (Scotland), 113 (Wales), 108 (NI)

Only responses ≥ 4% labelled

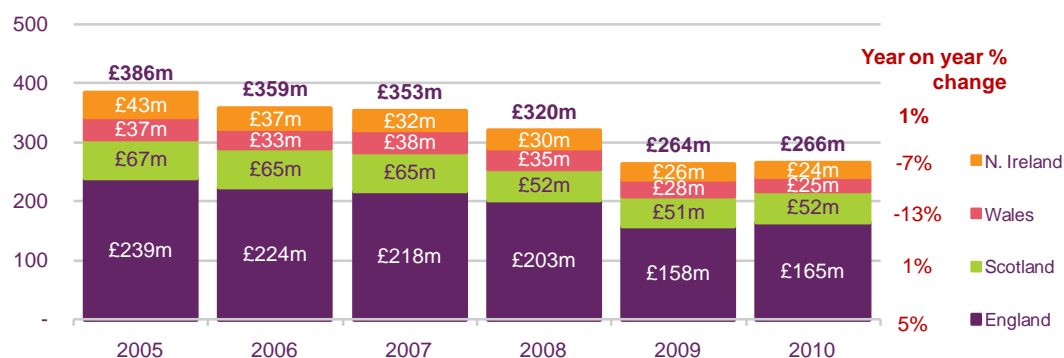
2.4 Spending by PSBs on first-run originated TV content for viewers in Northern Ireland

A total of £266m was spent by the BBC and ITV/STV/UTV on producing programmes specifically for viewers in Wales, Scotland, Northern Ireland and the English regions in 2010, up by £2m (or 1%) on 2009.

Year-on-year figures show that there was a 7% decrease in investment by the BBC and UTV on content for Northern Ireland viewers (down by £2m to £24m) – substantially less than the 25% reduction between 2008 and 2009. The reduction was the second highest among the UK's four nations (only spending in Wales fell further, by 13%). Investment in TV content for viewers in Northern Ireland is now on a par with Wales (£24m versus £25m) – compared to a £6m difference in spending in 2005 (£43m versus £37m). BBC spending remained flat over the period, while UTV's investment fell by 28% from 2009.

Figure 2.6 Spend on originated nations' and regions' output by the BBC, ITV1/STV/UTV

Spend (£m, 2010 prices)



Source: Broadcasters. All figures expressed in 2010 prices.

Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC.

At -43%, spending on Northern Ireland specific content experienced the biggest proportionate decrease between 2005 and 2010. This compared to a UK-wide reduction of 31% over the period, and falls of 33% in Wales, 31% in England and 23% in Scotland.

Figure 2.7 Spend on originated nations and regions output, by nation: 2005-2010



Source: Broadcasters. All figures expressed in 2010 prices.

Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC.

By genre, over a five-year period, investment in current affairs in Northern Ireland fell by 5% or £1m to £3m; spending on news declined by £7m, while in all other genres other than news and current affairs, the value of commissions declined by £11m. Taken together, the absolute reduction in spending in Northern Ireland was higher than that in Wales or Scotland.

Figure 2.8 Change in investment by genre and nation: 2005 – 2010

	England		Scotland		Wales		N. Ireland	
	1yr (£m)	5yr (£m)	1yr (£m)	5yr (£m)	1yr (£m)	5yr (£m)	1yr (£m)	5yr (£m)
News	4	-48	0	-3	2	-3	-1	-7
Current affairs	1	-3	0	-1	0	-1	-0	-1
Non-news/non-current affairs	1	-22	0	-11	-6	-9	-1	-11
Total Spend in 2010	£165m		£52m		£25m		£24m	

	England		Scotland		Wales		N. Ireland	
	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr
Change in Spend	5%	-31%	1%	-23%	-13%	-33%	-7%	-43%

Source: Broadcasters. All figures expressed in 2010 prices.

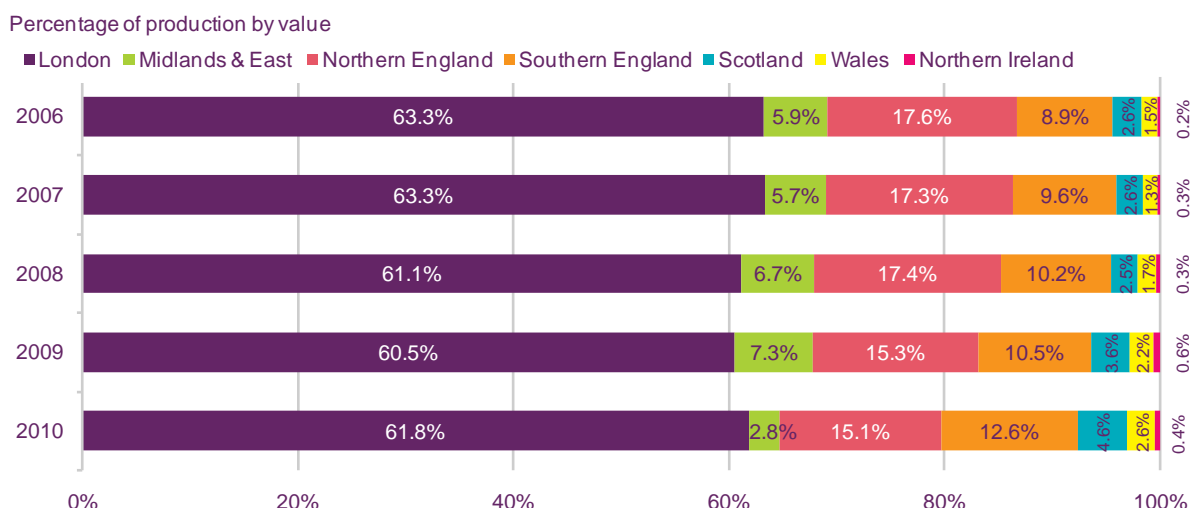
Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC.

2.5 PSB television quota compliance

Figure 2.9 illustrates the distribution of spend on qualifying first-run commissioned content in 2010 by PSB channels. Just over 60% of qualifying expenditure (61.8%) was devoted to productions made within the M25 area. This figure rose a little (by 1.3 percentage points) from the 60.5% in 2009, but was down from 63.3% in 2006. A further 15% of first-run spending was captured by producers based in the North of England (on a par with 2009) and 12.6% in Southern England (up from 10.5% in 2009).

In Northern Ireland, first-run productions accounted for 0.4% of expenditure, falling from 0.6% of total expenditure in 2009. In Scotland, the figure rose from 3.6% to 4.6%. In Wales, the figure rose from 3.6% of total spending on first-runs to 4.6%.

Figure 2.9 Expenditure on out-of-London productions

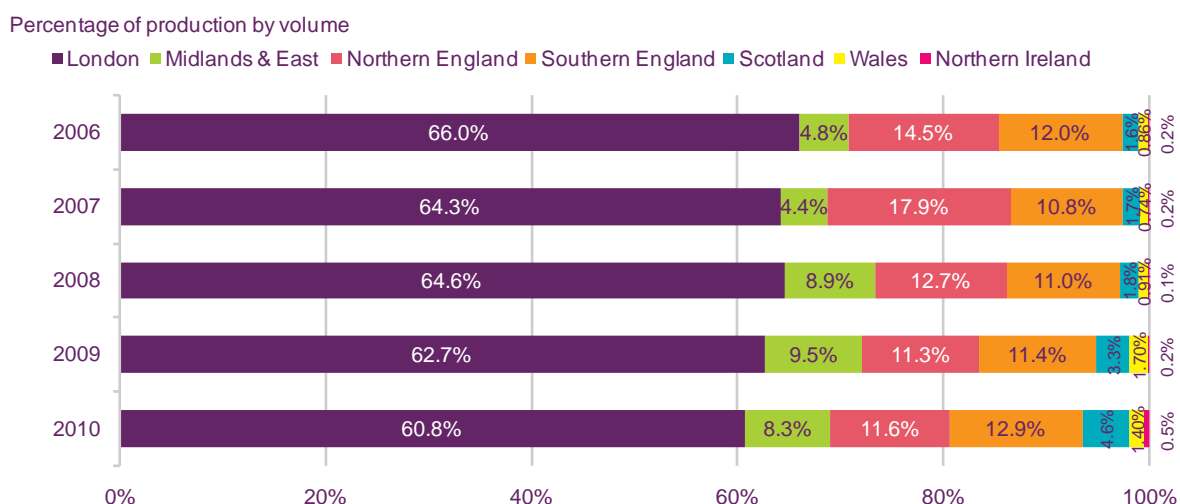


Source: Broadcasters

In terms of volume, 60.8% of first-run programmes made in the UK in 2010 were produced within the M25, down from 62.7% in 2009 and 66% in 2006. A further 11.6% were produced in Northern England, 12.9% in Southern England and 8.3% in the Midlands and East (a rise in each case compared to the 2009 figures – 11.3%, 11.4% and 9.5% respectively).

Producers in Northern Ireland delivered 0.5% of all first-run hours during 2010, (up from 0.2% in 2009), while the comparable figure for Scotland was 4.6%; up from 3.3% twelve months earlier (and up from 1.6% in 2006). First-run hours produced in Wales fell from 1.7% in 2009, to 1.4% in 2010 (but still up on the 0.9% figure for 2006) (Figure 2.10).

Figure 2.10 Volume of out-of-London productions



Source: Broadcasters

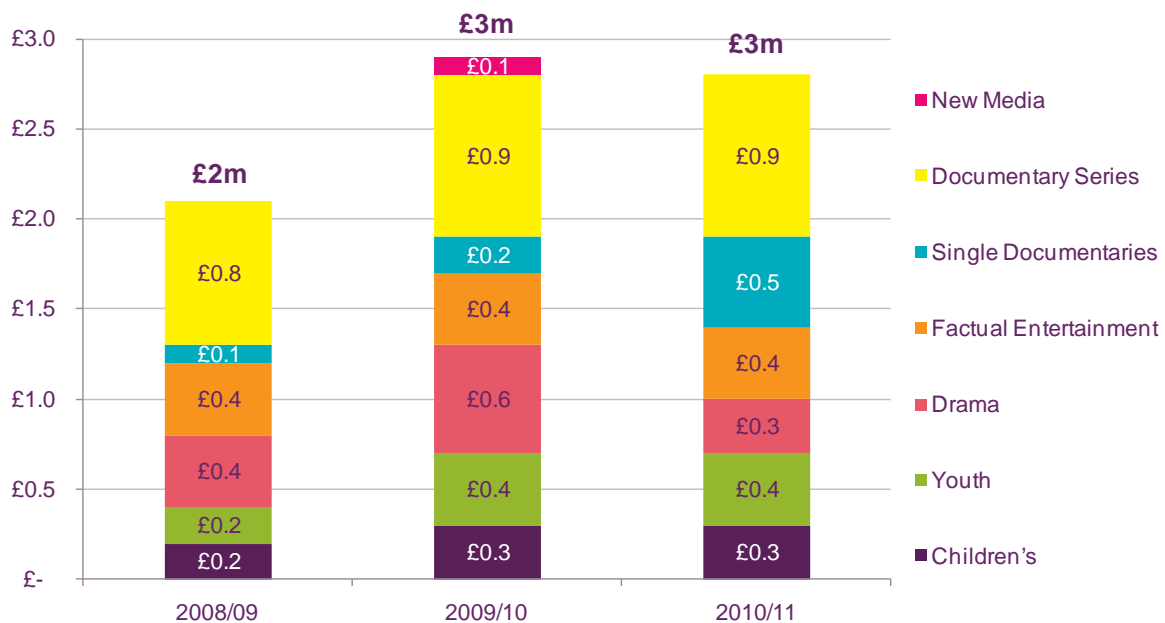
2.6 Irish language programming

In addition to English-language programming, viewers in Northern Ireland can watch Irish-language programming, mainly on the BBC and on TG4, the Irish language channel based in Galway in the Republic of Ireland. In Belfast, the local TV service, NvTv, also broadcast some programmes in Irish. Funding for Irish language programming comes mainly through the Irish Language Broadcast Fund (ILBF) which was set up under the Good Friday Agreement and is administered by Northern Ireland Screen.

In 2010/11, spend by the ILBF remained at £3m although investment levels in certain genres have changed. The largest component of spending in 2010/11 remained documentary series, comprising almost double the amount of the second largest genre category (single documentaries)

Spend on single documentaries has more than doubled since 2009/10 to £0.5m, while spend on drama has halved to £0.3m.

Figure 2.11 Spend by the ILBF on Irish language programming



Source: ILBF

2.7 Recent developments in Northern Ireland

Northern Ireland Screen announced the first and second calls for the new Ulster Scots Broadcast Fund (USBF) in February 2011. The organisation will oversee the new USBF with an anticipated budget of £1m per annum over the next five years (2011 to 2015). The USBF will provide finance for the production of film, television or other moving image projects relating to Ulster Scots heritage, culture and language in Northern Ireland. It aims to produce 20 hours of additional programming per year, with an initial audience target of 25,000 people.

In February 2010 the UK government confirmed £12m for the ILBF, securing the Fund's future until 2015.

The UK government has a commitment under the Good Friday Agreement of 1998 to secure the availability of TG4 in Northern Ireland after digital switchover and a commitment under a Memorandum of Understanding with the Republic of Ireland's government of February 2010 to facilitate the widespread availability of RTÉ 1 & 2 in Northern Ireland and of BBC One and Two in the Republic of Ireland. The Government asked Ofcom to identify suitable spectrum for the relay of these TV services in Northern Ireland and to advise the government on the technical and regulatory options.

In December 2010 the government confirmed plans to launch an additional 'mini-multiplex' in Northern Ireland using the interleaved spectrum which will carry TG4 and RTÉ 1 & 2. The UK government has requested that Ofcom issue a licence for such a multiplex to a not-for-profit joint venture formed by TG4 and RTÉ. This new 'mini-mux', combined with digital overspill, will mean that most viewers across Northern Ireland will continue to be able to watch these channels on a free-to-air digital platform.