1 Northern Ireland’s communications market

1.1 Introduction and key findings for Northern Ireland

Introduction

This section sets out a selection of the key facts and figures relating to communications markets in Northern Ireland in 2012, comparing and contrasting nations and highlighting changes that have taken place in the past year.

Key findings from Northern Ireland

<u>Communications services during the economic downturn</u>

- **Seven in ten people in Northern Ireland say they would spend less on communications services if they were forced to make cuts in spending**. This compares to around half (53%) of UK adults.

- **People in Northern Ireland are more likely to cut spend on pay TV than on other communications services**. At 30%, this is higher than the UK average (16%).

- **Around half of people in Northern Ireland say they will shop around for communications services in the next 12 months (52%),** which is higher than the UK average (36%). They are most likely to shop around for broadband services (34%), also above the UK average (23%).

- **Northern Ireland adults are more likely to put off purchasing a mobile phone (77%)** and carry on using the old one to save money, against half of all UK consumers.

<u>A study into inadvertent roaming in Northern Ireland</u>

This research was conducted as a follow-up to our research on inadvertent roaming in 2007, as well as to help us assess the impact of Eurotariffs and the growth in mobile data since then.

- **97% of mobile customers in South Armagh/South Down have experienced inadvertent roaming, and 30% encounter the problem every day.** In the East Derry/North Antrim area, three-quarters (75%) of mobile consumers encountered the problem.

- **Awareness of ways to help deal with the problem is low.** Three-quarters (75%) of mobile users are not aware of any tariffs that might help them deal with the problem. However, of those who did know about tariffs/bolt ons/price plans, nine in ten say that these save them money.

- **Inadvertent roaming affects mobile phone use.** Around two-thirds (67%) say that they do not go online; approximately half avoid inadvertent roaming by not making/receiving calls or sending texts.

TV and audio-visual content

- **Digital TV ownership stood at 91% of all TV homes in Q1 2012**, before the completion of digital switchover in October 2012. This is behind the UK average of 98%.

- **63% of TV homes in Northern Ireland have pay-TV services**, slightly higher than the UK average of 58%.

- **The combined channel share of the five main PSB channels declined by 14%** between 2006 and 2011, falling to 53% in 2011. This is in line with the UK average decline.

- **Spend on first-run originated programming by the BBC and UTV for viewers in Northern Ireland was down 36% since 2006**, giving Northern Ireland the largest decrease across the nations over a five-year period.

- **The number of first-run originated hours broadcast for viewers in Northern Ireland has decreased by 17% since 2006 to 931 hours**.

Radio and audio content

- **Across all the UK nations, take-up of DAB is lowest in Northern Ireland (22%).** Take-up is lower in rural areas (18%) where there are fewer stations.

- **Listening to BBC local stations is higher in Northern Ireland than in other UK nations**. BBC local stations accounted for 22% of listening hours in Northern Ireland, significantly higher than the UK average of 9%.

Internet and web-based content

- **Household take-up of broadband services in Northern Ireland was lower than the UK average in Q1 2012.** Take-up of fixed-line broadband (66%) and mobile broadband services (7%) in Northern Ireland were both lower than the UK averages (72% and 13% respectively) in Q1 2012. Overall, 69% of homes in Northern Ireland had a broadband connection (fixed or mobile) in Q1 2012.
- **Over-55s in Northern Ireland are significantly less likely to have broadband at home than in the rest of the UK**. Less than half (44%) of those aged 55+ had access to broadband services, compared to the equivalent UK average of 59%**.**
- **Over a third of adults in Northern Ireland access the internet on their mobile phone.** As smartphone penetration has risen from 21% to 34% of adults in Northern Ireland, so has the proportion of adults accessing the internet on their mobile; from 29% in Q1 2011 to 35% in Q1 2012. However, this was still lower than the UK average of 39%.

- **Nine per cent of households in Northern Ireland own a tablet computer, up by seven percentage points on Q1 2011.** Tablet take-up is higher in urban (11%) than in rural areas (6%).

Telecoms and networks

- **Northern Ireland had the highest household availability of superfast broadband services in March 2012, at 94%.** This was 34 percentage points higher than the UK average of 60%, mainly as a result of The Department of Enterprise, Trade and

Investment (DETI)'s Next Generation Broadband Project, which promoted the deployment of fibre optic services.

- **Household take-up of fixed telephony services was lower than average in Northern Ireland in Q1 2012 at 80%.** This was four percentage points lower than it had been a year previously, and four percentage points lower than the UK average of 84%.

- **Overall take-up of mobile telephony among adults in Northern Ireland was among the highest across the UK nations in Q1 2012, at 93%.** Nineteen per cent of homes in Northern Ireland used only mobile telephony in Q1 2012, slightly higher than the UK average of 15%.

Post

- **Adults in Northern Ireland receive fewer letters and cards than adults in the other parts of the UK.** The number of letters and cards received per week (6.4) appears to be lower that the UK average of 8.7 per week, as adults in Northern Ireland in our survey claimed to receive fewer items. The volume of letters and cards sent by adults in Northern Ireland is similar to the UK average of 3.1 items per month.

- **Adults in Northern Ireland are less likely to say that it is worth using post for important communications.** Fourteen per cent of adults in Northern Ireland agree that it is worth using post for important communications, the lowest across all UK nations and significantly lower than the UK average (34%).

- **Consumers in Northern Ireland claim to send post less regularly than in other nations**. Fewer consumers in Northern Ireland (49%) claim to send items of post regularly than the UK overall of 58%.

Media literacy

The *Adults' Media Literacy in the Nations* report is an annex to this report, and a summary of the key findings for Northern Ireland is included here.

- When asked which medium they would miss the most, more than four in ten adults in Northern Ireland (43%) say television, as with the UK overall (46%). Eighteen per cent would most miss using the internet, and 18% would most miss their mobile phone. One in ten (9%) would most miss listening to radio, and 4% reading newspapers/magazines.
- Concerns about media content are higher in Northern Ireland than the UK overall for each of: the internet (61% vs. 50%), television (54% vs. 39%) and mobile phones (29% vs.20%). Adults in Northern Ireland with televisions in the household are also more likely to be concerned about offensive content (37% vs. 19%).
- Internet users in Northern Ireland are more likely, compared to all UK users, to say they would never provide their personal email address (19% vs. 12%) or their mobile phone number (30% vs. 21%) online.
- Internet users in Northern Ireland are more likely than all UK users to have suffered a negative experience online in the past 12 months (80% vs. 66%). Around two in three internet users in Northern Ireland have received spam/ unwanted emails in the past 12 months (65% vs. 51%), with two in five saying they have had a computer virus (41% vs. 29%). Seven per cent say they have had their credit card details stolen as a result of an online transaction, compared to 2% in the UK.

1.2 Fast facts

Figure 1.1 Fast facts for Northern Ireland

	UK	England	Scotland	Wales	Northern Ireland	UK urban	UK Rural	NI urban	NI rural
Digital TV take-up among TV homes	98 ↑+2	97	99	99	91$^-$	97 ↑+2	98 ↑+4	93$^-$	88
Broadband take-up	76	78	68$^-$ ↑+7	68$^-$	69$^-$	76	77	69$^-$	69$^-$
Mobile broadband take-up	13	13	12	16	7$^-$	13	10	7$^-$	8$^-$
Mobile phone take-up	92	93	85$^-$	92 ↑+5	93	92	92	94	92
Use mobile to access internet	39 ↑+7	40 ↑+6	31$^-$ ↑+10	39 ↑+14	35 ↑+6	39 ↑+5	35 ↑+12	36	35 ↑+13
Smartphone take-up	39 ↑+12	40 ↑+11	32$^-$ ↑+14	39 ↑+14	34 ↑+13	39 ↑+12	37 ↑+10	36 ↑+10	30$^-$ ↑+13
Fixed landline take-up	84	85	82	80	84	83	91$^+$	79	83
Households taking bundles	57 ↑+4	58 ↑+4	47$^-$	47$^-$	51$^-$ ↑+5	57 ↑+3	56 ↑+11	53	46$^-$ ↑+10
DAB ownership amongst radio listeners	38	40	29$^-$	29$^-$	22$^-$	38	41	25$^-$	18$^-$
Smart TV ownership among TV homes	5	5	4	3	4	5	4	4	3
Tablet computer take-up	11 ↑+9	11 ↑+9	11 ↑+10	8 ↑+6	9 ↑+7	11 ↑+9	11 ↑+9	11 ↑+8	6$^-$ ↑+4
E-reader take-up (personal use)	10 ↑+7	10 ↑+7	8 ↑+6	13 ↑+10	8 ↑+5	11 ↑+8	15$^+$ ↑+12	10 ↑+7	6
Fixed telephony availability	100	100	100	100	100				
Fixed broadband availability[1]	99.98	100.00	99.87	100.00	100.00				
LLU availability[2]	92	93	84	88	79				
Cable broadband availability[3]	44	47	35	23	29				
FTTC broadband availability[4]	31	33	10	17	87				
Superfast broadband availability[5]	60	62	42	34	94				
2G mobile availability[6]	99.7	99.8	99.2	99.2	98.7				
3G mobile availability[7]	99.1	99.7	97.0	97.6	88.3				
DTT availability[8]	97	98	99	98	66				
TV consumption (hours per day)[9]	4.0	3.6-4.5	4.5	4.4	4.2				
Radio consumption (hours per day)	3.2	3.2	3.1	3.3	3.2				

Key: $^+$Figure is significantly higher than UK average; $^-$Figure is significantly lower than UK average;
↑+xx *Figures has risen significantly by xx percentage points since 2011*

Source: Ofcom Research Q1 2012, BARB, RAJAR, Industry data. Base: All adults aged 16+ (+ (n = 3772 UK, 513 Wales, 2251 England, 500 Scotland, 508 Northern Ireland, 2731 UK urban, 1041 UK

rural, 1963 England urban, 288 England rural, 264 Scotland urban, 236 Scotland rural, 249 Wales urban, 264 Wales rural, 255 Northern Ireland urban, 253 Northern Ireland rural)
Notes: BARB data based on all individuals (aged 4+). PSBs = BBC One, BBC Two, ITV1, C4, Five. RAJAR data based on all adults (aged 16+). PSBs = all BBC radio. National data based on TSA's of BBC Radio stations of respective nations. DAB radio uptake is sourced from Ofcom's technology tracker.
1. Proportion of premises able to receive ADSL broadband services based on data reported by BT
2. Proportion of households connected to an LLU-enabled exchange
3. Proportion of households passed by Virgin Media's broadband-enabled network; excludes homes where Virgin Media is not also able to provide fixed voice and pay-TV cable services.
4. Ofcom estimate of the proportion of households able to receive FTTC services
5. Ofcom estimate of the proportion of households able to receive superfast broadband services
6. Proportion of premises that have outdoor 2G mobile coverage from at least one operator
7. Proportion of premises that have outdoor 3G mobile coverage from at least one operator
8. Availability of 17 services. Ofcom estimates.
9. These figures are based on the share of viewing to the main five PSB channels only. It is not possible to provide a single figure for 'England' so instead a range is displayed reflecting the regions with the highest and lowest figures respectively.

1.3 Communications services during the economic downturn

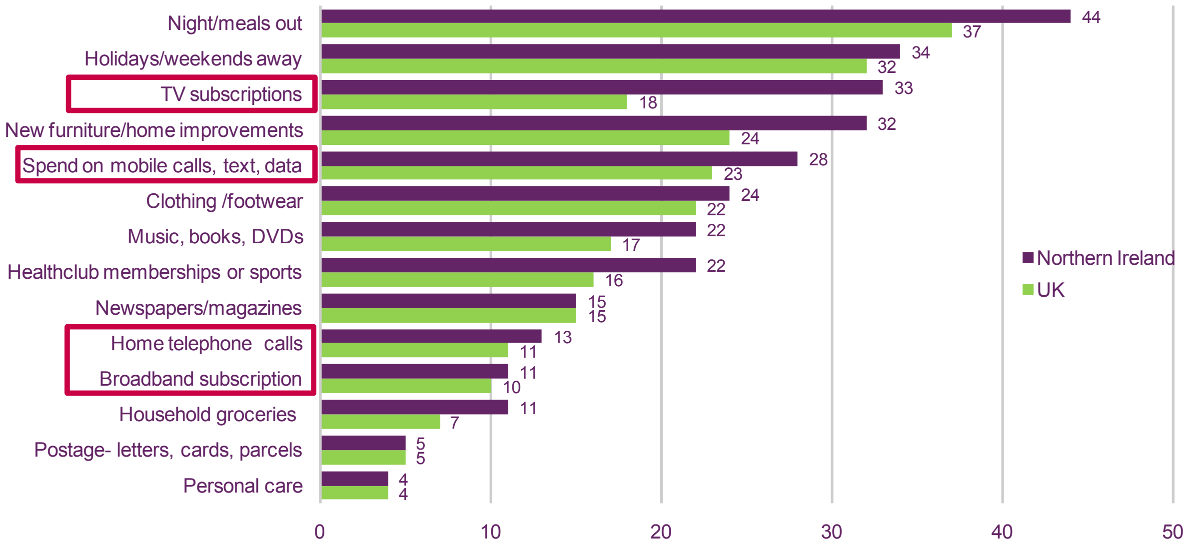
Since the last *Communications Market Report* was published in August 2011, the UK economy has officially fallen back into recession. This section explores the impact on attitudes towards spending on communications services in the context of the economic downturn. It summarises the findings of an omnibus survey commissioned in February/ March 2012.

Consumers in Northern Ireland are less willing to cut back spending on communication services than on other items

Our research shows that consumers say they value communications service more than other items, as the economic downturn continues.

Figure 1.2 shows that if forced to reduce spending, consumers in Northern Ireland are more likely to cut back on items such as nights out (44%) or holidays/weekends away (34%), than most communication services. A third (33%) say that they would cut spend on TV subscriptions.

Figure 1.2 Items and services where consumers are most likely to cut back their spending



Source: Ofcom Attitudes toward spending research, 2012
Base: All adults aged 16+ (n=2124 UK, 1726 England, 182 Scotland, 99 Wales, and 117 Northern Ireland)
Q: If you were forced to cut back spending, which of the following items/services would you be likely to spend less on? (Multichoice)

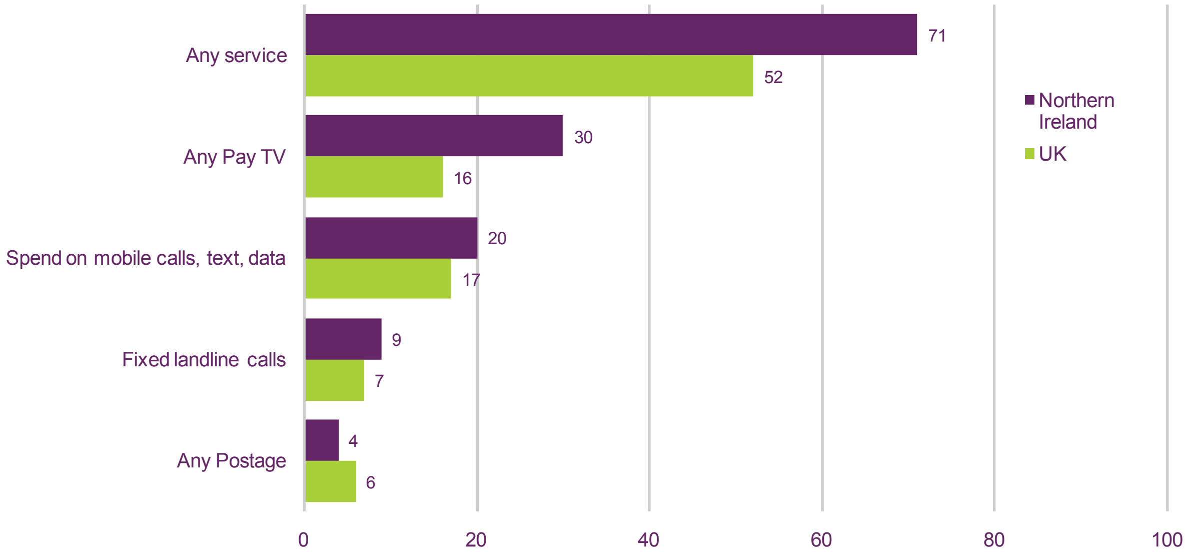
Seven in ten people in Northern Ireland say they would spend less on communications services if they were forced to cut down on spending

When asked whether they would make cuts on any communication services if they were forced to cut overall spend, 71% of people in Northern Ireland said they would. This is higher than the UK average of 52% and the highest of all the nations.

People in Northern Ireland are more likely to cut spending on pay TV than on other communication services. Around one third (30%) in Northern Ireland would cut spend on this, higher than the UK average of 16%.

The next service people would cut is mobile phone calls, text and data (20%), similar to the UK overall at 17%.

Figure 1.3 Single service most likely to cut spending on



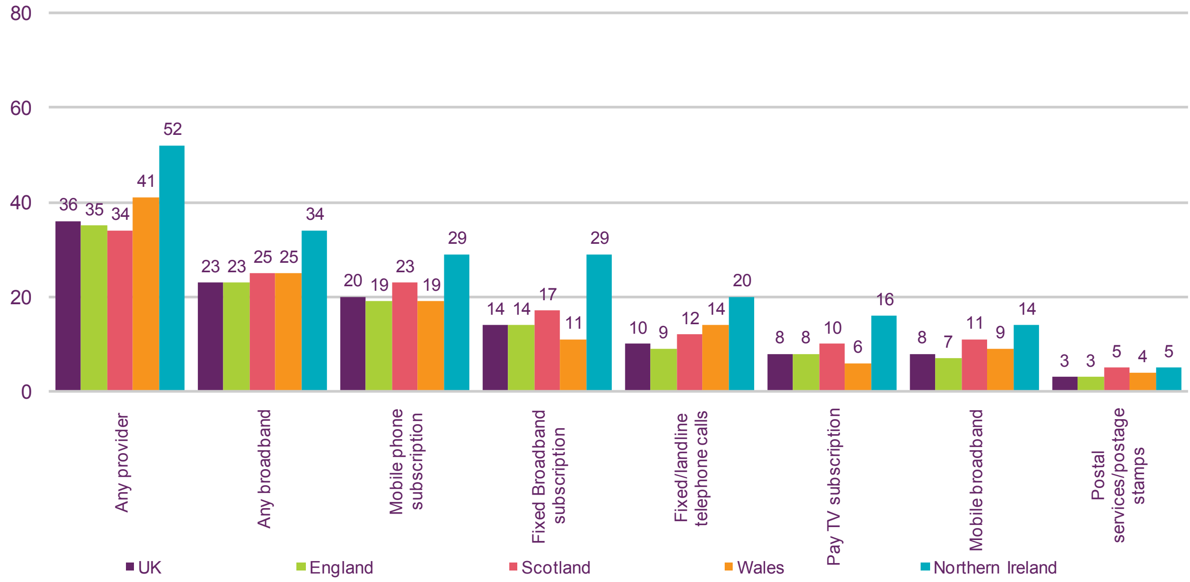
Source: Ofcom Attitudes toward spending research, 2012
Base: All adults who have a named service (n=2059 UK, 1662 England, 181 Scotland, 99 Wales, and 117 Northern Ireland)
Q: And which ONE of the following services would you be MOST LIKELY to cut back spending on? (Single choice)

Around half of people in Northern Ireland say they are more likely to shop around for communication services, compared to a year ago

Just over half (52%) of people in Northern Ireland say they are more likely to shop around for communication services than they were a year ago. This is higher than the UK average (36%).

People in Northern Ireland are more likely to say they will shop around for each of the communications services asked about. They are most likely to shop around for broadband services (34%), also above the UK average (23%).

Figure 1.4 Services consumers are more likely to shop around for than a year ago



Q12: And which of the following are you MORE LIKELY to shop around for than you were 12 months ago? (Multi-choice)
Source: Ofcom Attitudes toward spending research, 2012
Base: All UK adults aged 16+ n = 2124

People in Northern Ireland are more likely to consider taking communications services as a bundle than in the UK as a whole

Fifty-five per cent of consumers in Northern Ireland agree that they would take bundled communications services from a single supplier in order to save money. This is higher than in the UK overall (41%) and the highest of all the UK nations.

Figure 1.5 Consumers' agreement/disagreement that they were more likely to take communications services in a bundle

Proportion of respondents (%)

Source: Ofcom Attitudes to spending omnibus research, 2012
Base: total sample (n=2124) England (n= 1726), Scotland (n=182), Wales (n=99), Northern Ireland, (n=117))
Q: Please tell me the extent you agree or disagree with....' I'm more likely to consider purchasing TV, broadband, and phone services in a package from the same supplier as it offers better value for money'

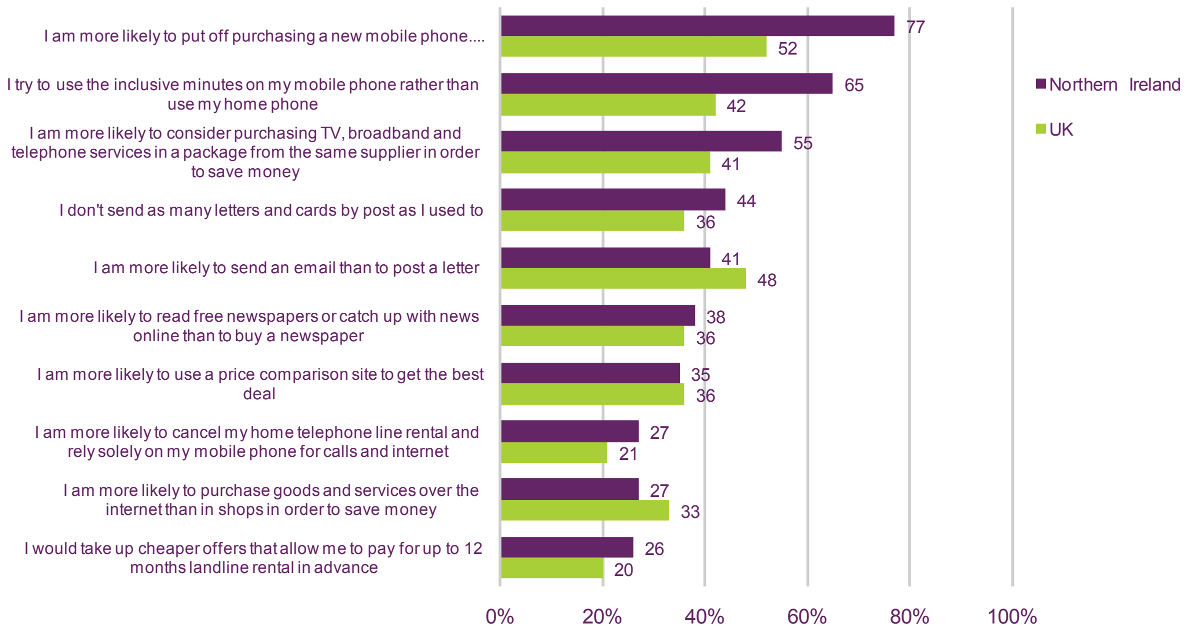
People in Northern Ireland are more likely to put off buying a new mobile handset to save money

Consumers were read a series of statements about how their attitudes to spending on communication services may have changed during the economic downturn.

Three-quarters (77%) of people in Northern Ireland agreed that they are likely to put off buying a new mobile phone and will continue to use their old handset. This compares to the UK average of 52%.

Two-thirds (65%) of consumers in Northern Ireland (compared to 42% in the UK) agree that they try to use the inclusive minutes on their mobile phone package rather than use their landline to make calls.

Figure 1.6 Northern Ireland consumers' attitude to spending on communications services in the economic downturn



Q: Here are some things other people have said about how the economic down turn has changed their spending on TV, broadband, mobile and land telephone services. Please tell me to what extent you agree or disagree with the following statements
Source: Ofcom Attitudes toward spending research, 2012
Base: Adults in Northern Ireland aged 16+ n = 117

1.4 Inadvertent roaming research

Background

Inadvertent roaming, where a mobile phone user in Northern Ireland roams onto a network in the Republic of Ireland (RoI) and incurs extra costs for doing so, continues to be a problem for consumers in Northern Ireland.

In order to better understand how consumers are affected by this problem, we commissioned consumer research among mobile phone users in border areas.

Following initial research in 2007 into inadvertent roaming in five border areas, we concentrated on the two worst-affected areas in the 2007 study; East Derry/North Antrim and

South Armagh/ South Down. Research was conducted during March and April 2012 in the form of 412 face-to-face street questionnaires among mobile consumers aged 16+. Of this sample, 45 respondents who had experienced inadvertent roaming in the past year went on to complete a seven-day diary of their experiences.

Inadvertent roaming occurs when a consumer unwittingly or unavoidably makes or receives a call, sends/receives a text message or uses data/accesses the internet on their phone, on a network on the other side of the border.

Ofcom last carried out research into inadvertent roaming in 2007, just before Eurotariffs were introduced. These price caps, introduced by means of an EC Regulation, were the first time a limit had been placed on roaming charges[1]. This follow-up research was conducted to help us assess their impact as well as the growth in mobile data since then.

Lower price caps, due to be introduced in July 2012 by the European Union, will see roaming charges reduced for voice calls and texts. The rules will also see the introduction of a cap on data roaming charges. These will reduce the unit price of using roaming services and potentially lower the cost of inadvertent roaming; however, the overall cost to consumers may not decrease as use continues to increase.

Research objectives

- To understand (quantitatively) the extent and impact of inadvertent mobile roaming for consumers in Northern Ireland.
- To measure the frequency with which consumers in these areas experience inadvertent roaming, with regard to phone calls, text messaging and using data on mobile handsets.
- To measure awareness and use of tariffs offered by operators to deal with the problem
- To obtain information to make an estimate of the costs incurred by the consumers affected

Below is a summary of the key findings. The full research report is published as an annex here: www.ofcom.org.uk/....

The majority of mobile phone customers in border areas are aware of inadvertent roaming, with awareness lowest around the use of data/accessing the internet

Ninety-three per cent of all respondents are aware of the problem, with 72% claiming to have a high level of awareness (they either fully understand or have heard a lot about inadvertent roaming).

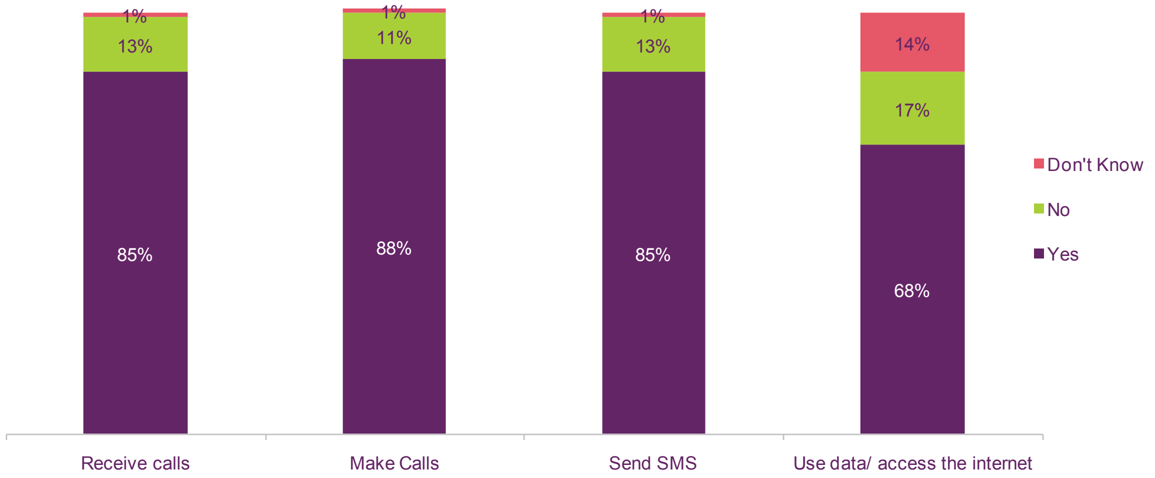
Awareness of inadvertent roaming was lowest in relation to using a mobile to access data/ the internet. Sixty-eight per cent of respondents were aware that they might incur charges if their mobile picks up an RoI network while they are still in Northern Ireland when accessing the internet, compared to 88% who are aware of this problem when making calls (Figure 1.7).

[1] Regulation (EC) No 717/2007 of the European Parliament and of the Council of 27 June 2007, as amended by Regulation (EC) No 544/2009 of the European Parliament and of the Council of 18 June 2009.

Those in younger age groups were the most likely to be aware that they might have to pay more than their normal rate to use data/access the internet if their mobile handset roams to a RoI network. Eighty-three per cent of those aged 16-24, and 76% of those aged 25-44 were aware of this, compared to 51% of those aged 45+.

Awareness was also higher in South Armagh/ South Down (98% had heard of the problem) where incidence of inadvertent roaming was higher, than in East Derry/ North Antrim, where 88% of mobile consumers were aware of the issue.

Figure 1.7 Awareness of inadvertent roaming among mobile users in Northern Ireland



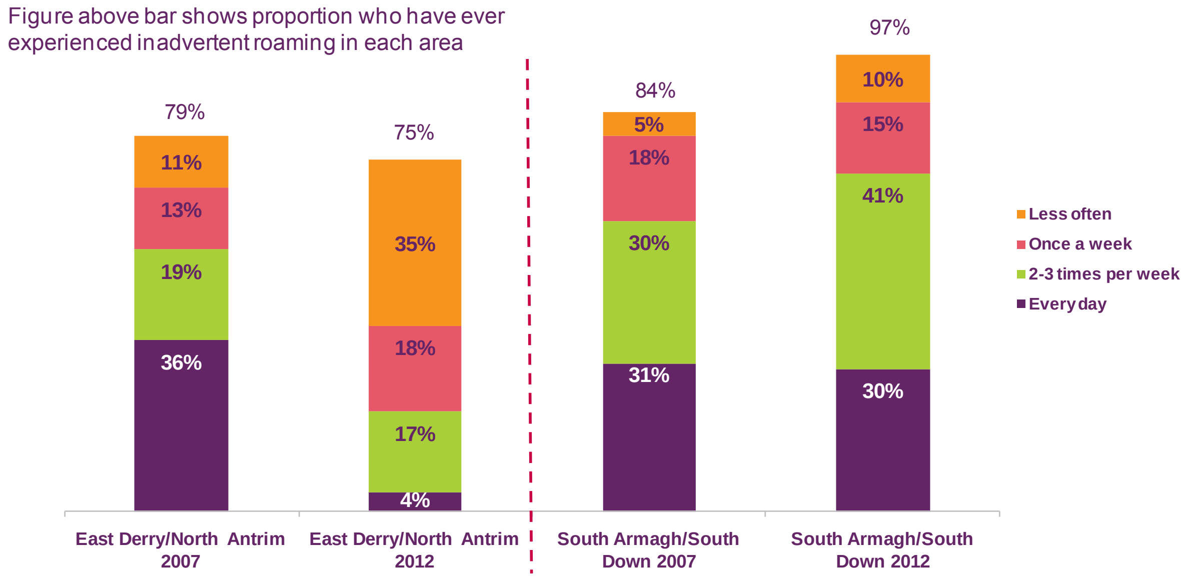
Source: Ofcom research, fieldwork carried out by SRB in March and April 2012
Base: All respondents: 2012: 412
QA4/ QA5/ Q6/ QA7 - Before today were you aware that if your mobile handset picks up a Republic of Ireland signal while you are still in Northern Ireland you may have to pay to receive calls / to make calls/ send text messages/ use data/access to the internet

Nearly nine in ten mobile customers in South Armargh/ South Down experience inadvertent roaming at least once a week

Of the two areas studied, South Armagh/South Down was the most affected; 30% of consumers encounter the problem every day and 87% experience it at least once a week. Almost all mobile consumers (97%) in this area have experienced inadvertent roaming at some point.

In comparison, the problem appears to be less prevalent in East Derry/ North Antrim, although three-quarters of consumers here had also experienced inadvertent roaming (75%). Only 4% of these experienced the problem every day.

Figure 1.8 Frequency of inadvertent roaming

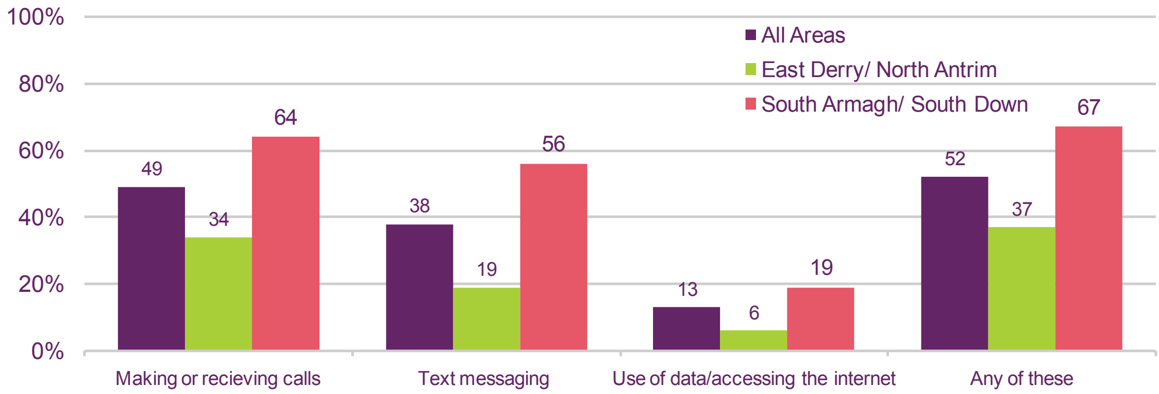


Source: Ofcom research, fieldwork carried out by SRB in March and April 2012
Base: All respondents: 2012: 412, East Derry/North Antrim 202, South Armagh/South Down: 210
QA2. Have you EVER picked up a REPUBLIC OF IRELAND network on your mobile handset when in NORTHERN IRELAND? /QB2 How often does this occur?

Half of respondents claim to have incurred charges due to inadvertent roaming

Half of all mobile consumers (52%) claimed to have incurred extra charges as a result of roaming to a Republic of Ireland network while still in Northern Ireland. Consumers were most likely to incur charges when making or receiving calls, with 49% claiming to have had extra costs on their bill as a result. Those in South Armagh/South Down – the worst affected area – were more likely to incur extra charges through calls, text messaging and using data.

Figure 1.9 Percentage of consumers who incur extra charges because of problem

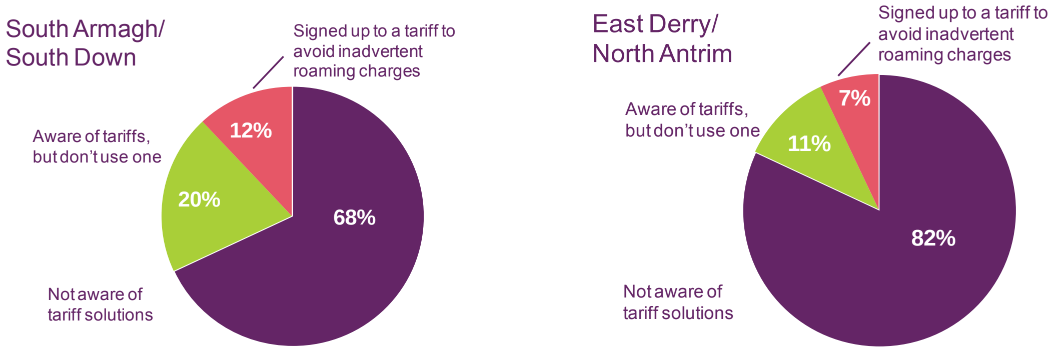


Source: Ofcom research, fieldwork carried out by SRB in March and April 2012
Base: All respondents:2012 412 , Area 1: 202, Area 5: 210
QA8: Have you ever to your knowledge had extra costs on your mobile phone bill that relate to your mobile phone picking up a Republic of Ireland tariff when you are in Northern Ireland for any of the following?

Three-quarters of mobile consumers are unaware of tariff solutions to manage the cost of inadvertent roaming

Overall, 75% of consumers are unaware of any special tariffs, price plans or 'bolt-ons' available from their network provider to deal with the problem. Furthermore, only 9% of consumers have signed up to one of these. Figure 1.10 shows that awareness of tariff solutions varies across the two areas studied; people in South Armagh/ South Down, where inadvertent roaming occurs more frequently, are more likely to be aware of these tariffs than those in East Derry/ North Antrim (32% vs. 18%).

Figure 1.10 Awareness of tariff solutions to deal with inadvertent roaming



Source: Ofcom research, fieldwork carried out by SRB in March and April 2012
Base: All respondents: 2012: 412, East Derry/North Antrim 202, South Armagh/South Down: 210
QA9: Are you aware of any special tariffs, price plans or 'bolt-ons' available from your network provider to deal with the problem?/ QA10: Do you currently use one?

Nine in ten consumers with a special tariff claim it saves them money

Despite the low awareness of tariff solutions, 92% of those who were on a special tariff, price plan or 'bolt-on' to deal with the issue claimed it saved them money on at least one of the following: calls made, calls received, text messages sent, using data/going online via the phone.

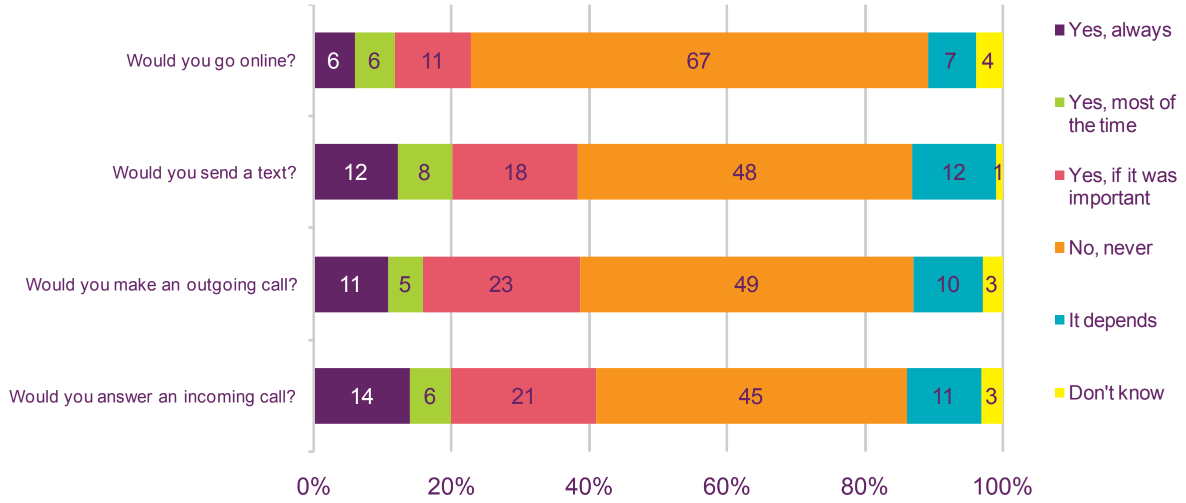
When inadvertent roaming occurs, special tariffs or 'bolt-ons' were most likely to save consumers money on making calls, with 76% of consumers on such a tariff claiming it reduces these roaming costs. This is in contrast to the 44% who said such price plans saved them money when using data/going online using their phone

Of those who were aware of tariff solutions but did not use them, the main reasons given were that they were 'too expensive', or they 'are not affected often enough to make it worthwhile'.

Inadvertent roaming has a significant impact on usage for consumers in the border areas

Consumers cope with the problem of inadvertent roaming mainly by avoiding using their phone. In all instances (call/ text/ online), at least 45% of those who had previously experienced inadvertent roaming claimed they would never send a text, make an outgoing call, or answer an incoming call if they knew they were on a Republic of Ireland network. This is particularly true in relation to use of data / going online, as 67% of consumers who had experienced inadvertent roaming said they would never go online if they knew their phone had inadvertently roamed to a RoI network (Figure 1.11).

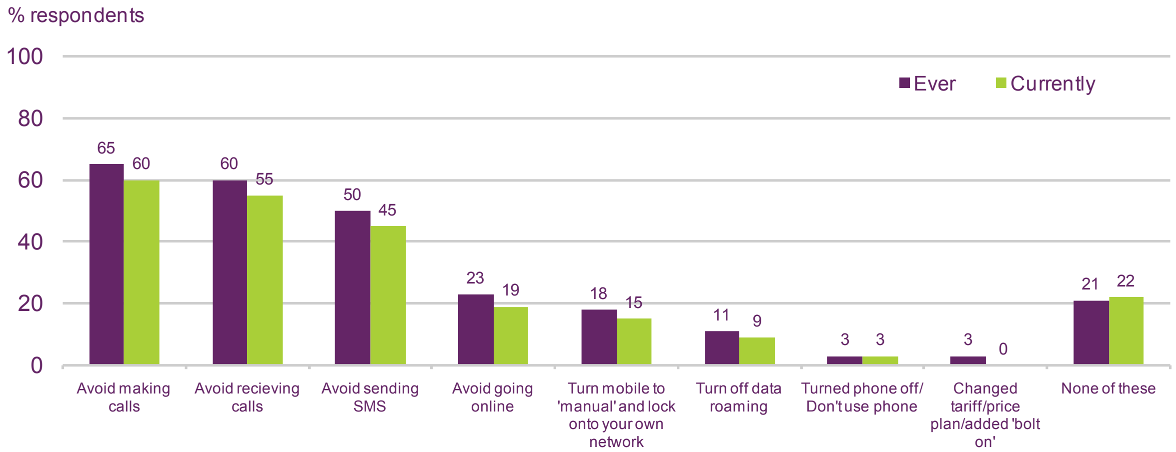
Figure 1.11 The impact of inadvertent roaming on phone usage



Source: Ofcom research, fieldwork carried out by SRB in March and April 2012
Base: Respondents who have experienced IR: 355
QB10: If you know you are on a REPUBLIC OF IRELAND network while in Northern Ireland and there is an incoming call, would you answer it?
QB11: If you know you are on a REPUBLIC OF IRELAND network while in Northern Ireland and you wanted to make an outgoing call/ to send a text message/ wanted to use your mobile phone to access the internet would you make/ send it/ go online?

In addition to avoiding using their phone, Figure 1.12 shows that about one in five consumers who have experienced inadvertent roaming have changed their phone settings in some way (e.g. by manually 'locking' onto own network (15%) or by turning off data roaming (9%).

Figure 1.12 Methods used to avoid extra charges from inadvertent roaming



Source: Ofcom research, fieldwork carried out by SRB in March and April 2012
Base: Those who have ever picked up a ROI network when in Northern Ireland/ those who have ever experienced inadvertent roaming: 355
QB8: Have you ever done any of the following things to avoid paying extra charges when you pick up a Republic of Ireland network?/ QB9: And which of these things do you currently do?

Only one in ten affected consumers make a complaint

Of those affected by inadvertent roaming, only 9% have made a complaint, with the majority contacting their mobile operator. Survey responses suggested that the advice given often did

autumn 2013. A further 24 areas including Derry / Londonderry and Limavady have been identified for a future round of licensing.

Local TV will be broadcast on Freeview and have a high position in the electronic programme guide (EPG). BSkyB and Virgin have committed to offering apps or the use of the yellow button on their interactive menu to broadcast the services.

Ulster Scots programming[3]

The Ulster-Scots Broadcast Fund (USBF) opened for the receipt of applications in February 2011. The fund provides finance for the production of film, television or other moving image projects relating to the Ulster Scots heritage, culture and language in Northern Ireland. Awards were made in 2011/12 for 18 hours of production.

The USBF, in conjunction with BBC Northern Ireland, has set a high editorial bar for Ulster-Scots programming, hoping that some of the programming will be re-broadcast on BBC Four. The targets have been revised for 2012/13 to take account of the new focus on landmark content.

Targets for 2012/13 include:

- Deliver 12 additional hours of Ulster-Scots programming in a range of genres, focusing on landmark content.
- Broadcast 90% of the USBF-funded programming within six months of delivery.
- Reach an initial audience of 40,000 people in Northern Ireland.

2.2 Digital television take-up in Northern Ireland

Digital television take-up remains stable in Northern Ireland

Ahead of digital switchover in October 2012, just over nine in ten homes with a TV in Northern Ireland have a digital television service. This is lower than the UK average (98%), but Northern Ireland is the only UK nation where digital switchover is yet to begin (it has been completed in Scotland and Wales).

Consumers in Northern Ireland who are aged 55+ and in DE socio-economic groups are less likely to have converted to digital television at home. Take-up is higher in urban (93%) than in rural areas (88%).

[3] Northern Ireland Screen (http://www.northernirelandscreen.co.uk/)

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

Source: Ofcom research, Quarter 1 2012
Base: All adults aged 16+ (n = 3772 UK, 508 Northern Ireland, 2251 England, 500 Scotland, 513 Wales, 255 Northern Ireland urban, 253 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012)

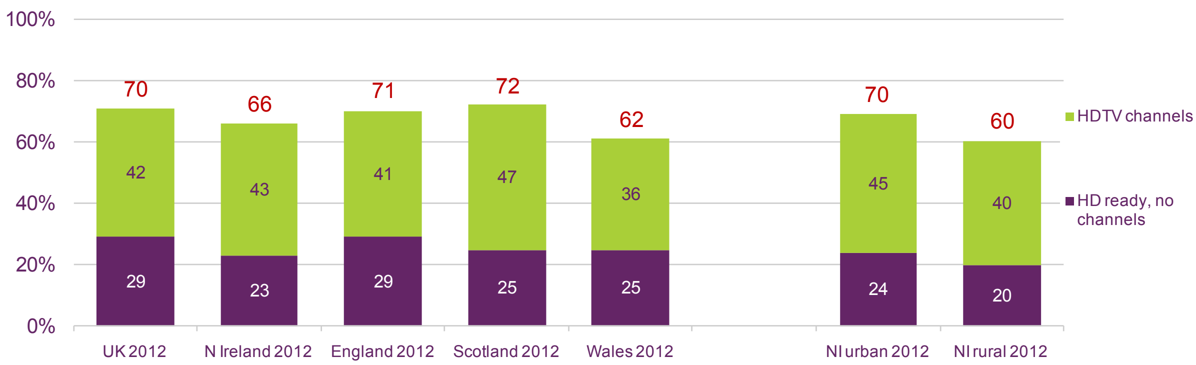
2.3 Ownership of high definition and smart TVs

Two-thirds of those with an HD-ready TV have access to HD channels

Across all the UK nations, there has been a significant rise in the proportion of homes with HD-ready TVs and those claiming to have access to HDTV channels. Northern Ireland saw HDTV access rise from 32% of households in Q1 2011 to 43% in Q1 2012, in line with the UK average (42%). A further 23% have an HD-ready TV.

Take-up of HDTV services is higher in urban (45%) than in rural (40%) areas in Northern Ireland.

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

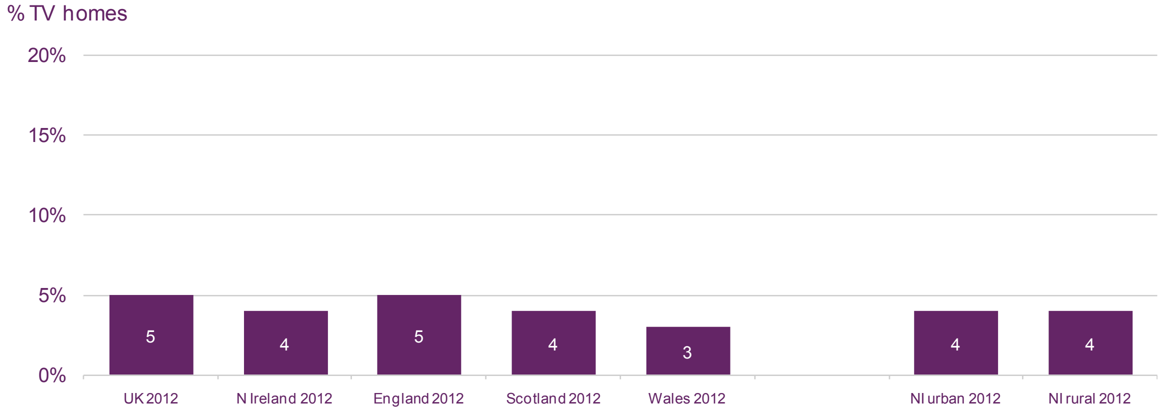


Source: Ofcom research, Quarter 1 2012
Base: All adults aged 16+ (n = 3772 UK, 508 Northern Ireland, 2251 England, 500 Scotland, 513 Wales, 255 Northern Ireland urban, 253 Northern Ireland rural)

Take-up of smart (internet-enabled) TVs on a par with UK average

A small proportion (4%) of homes in Northern Ireland claim to have purchased a smart TV with an integrated internet connection (Figure 2.4). Smart TV ownership in Northern Ireland is at a similar level to the UK average (5%).

Figure 2.4 Take-up of smart TVs



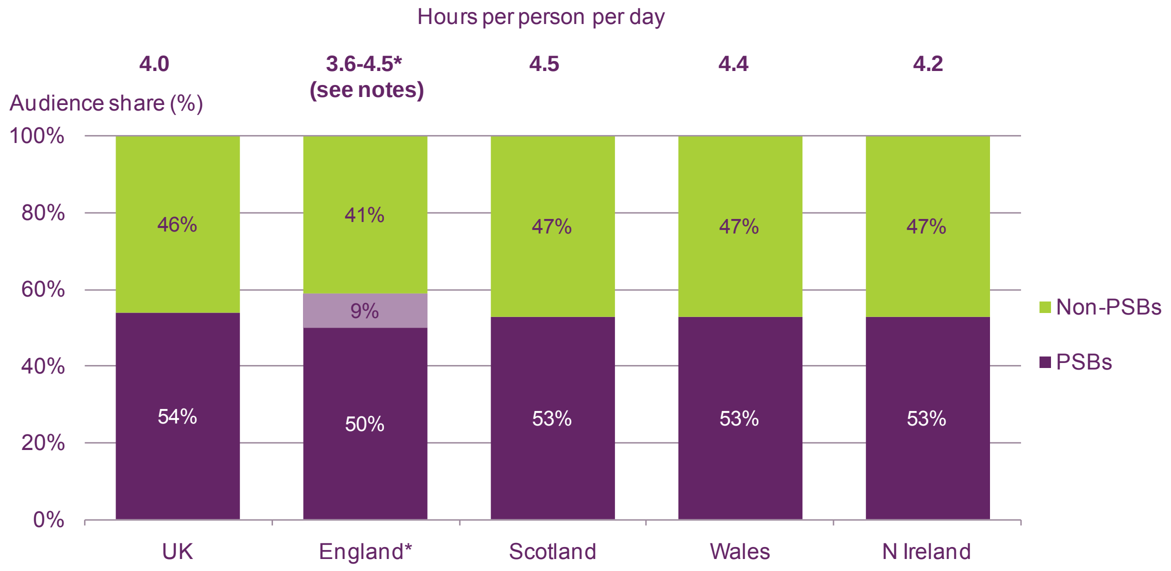
Source: Ofcom research, Quarter 1 2012
Base: All adults aged 16+ with a TV in household (n = 3713 UK, 502 Northern Ireland, 2214 England, 489 Scotland, 508 Wales, 253 Northern Ireland urban, 249 Northern Ireland rural)
QH18. Are any of your TV sets "Smart TVs"? These are new types of TV that are connected to the internet and can stream video directly onto your television screen, without the need for a computer, set-top box or games console.

2.4 Broadcast television viewing

People in Northern Ireland spend 4.2 hours per day watching TV

In 2011, people in Northern Ireland spent 4.2 hours per day watching television, slightly higher than the UK average of 4.0 hours. Figure 2.5 also shows the split in viewing between the main five PSB channels and other channels.

Figure 2.5 Average hours of daily TV viewing by nation, 2011

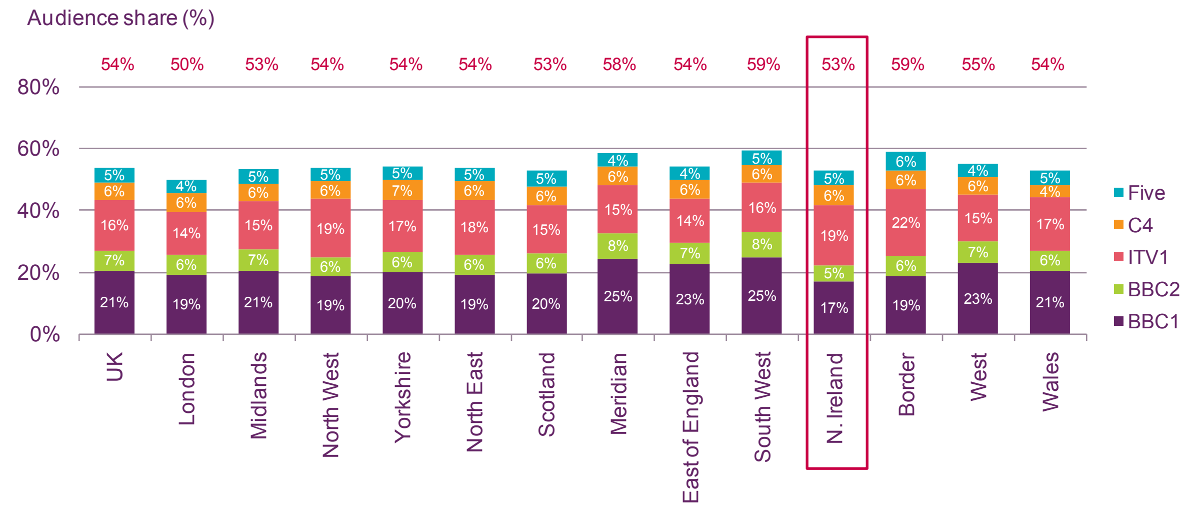


*Source: TV = BARB. Based on all individuals (aged 4+). PSBs = BBC One, BBC Two, ITV1, C4, Five. *Note: It is not possible to provide a single figure for England so instead PSB share is described as a range, reflecting the regions with the highest (North East – 59%) and lowest (West – 50%) figures respectively.*

Over half (53%) of all viewing in Northern Ireland is to the five main PSB channels

In 2011, the five main PSB channels accounted for a combined 53% share of total TV viewing in Northern Ireland, comparable to that in the other nations and to their average share across the UK (54%).

Figure 2.6 Share of the five main PSB channels, all homes: 2011

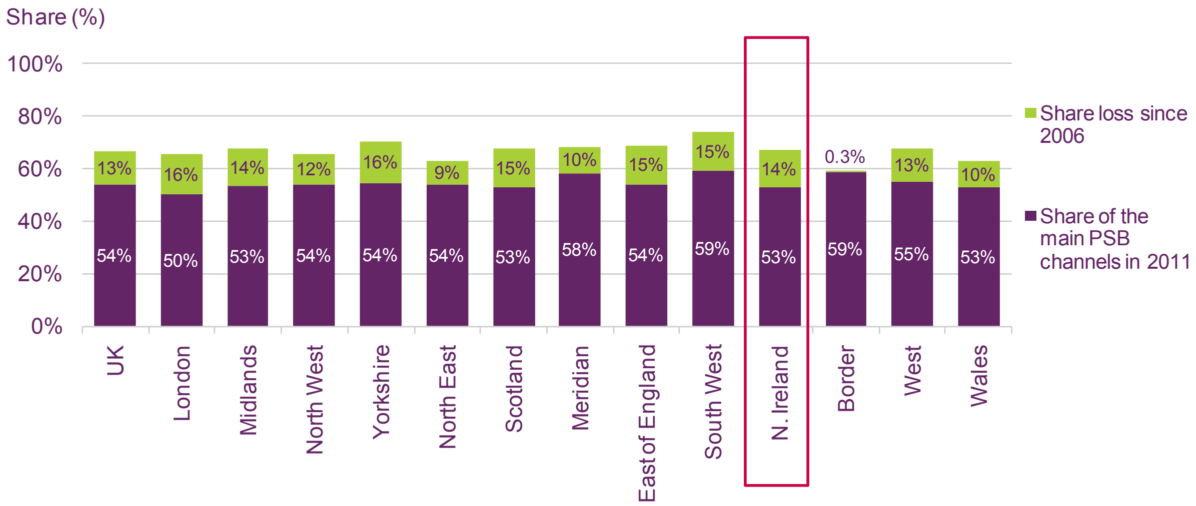


Source: BARB, all individuals (4+)

Between 2006 and 2011, the combined channel share of the five main PSB channels declined by 14 percentage points, falling to 53% in 2011, similar to the UK average decline

From 2006 to 2011, there was a 14pp reduction in the combined share of the five main PSB channels in Northern Ireland (falling to 53% in 2011), marginally more than the average decrease across the UK (13pp).

Figure 2.7 Reduction in combined share of the five main PSB channels, all homes: 2006 and 2011

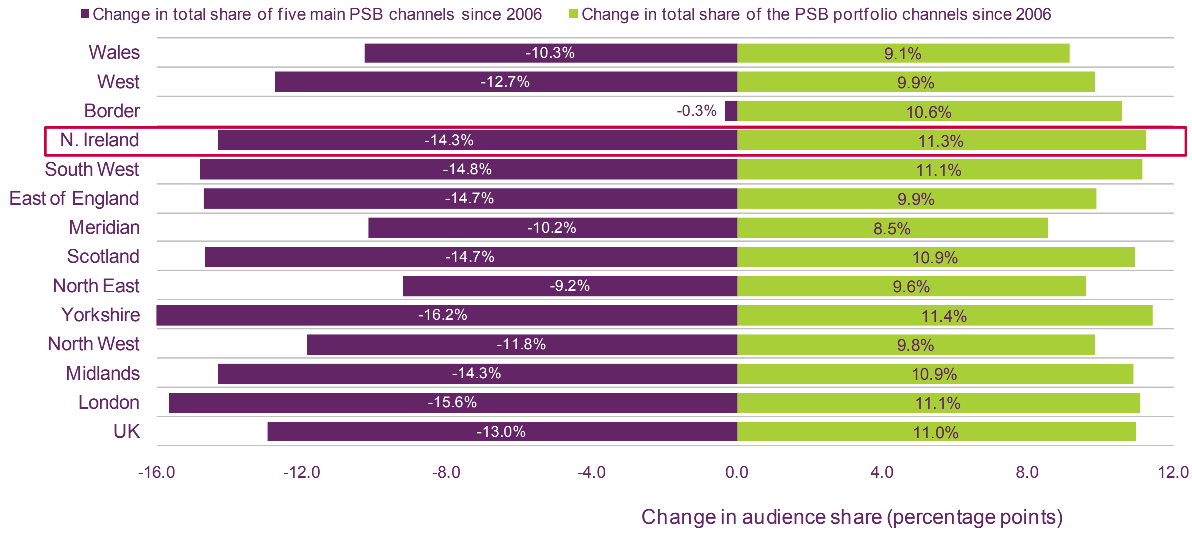


Source: BARB, all individuals (4+)
Note: In 2010 a new BARB panel was introduced, including the re-defining of boundaries. Therefore, pre- and post-panel change data should be compared with caution.

The PSB channels total combined share (including digital channels) decreased by 3.0pp between 2006 and 2011, compared to the UK average net loss of 2.0pp

From 2006 to 2011, the five main PSB channels experienced a 14.3pp decrease in their combined share of total TV viewing in Northern Ireland, compared to the UK average decrease of 13.0pp. Among viewers in Northern Ireland, the PSBs' portfolio channels enjoyed an 11.3pp increase in viewing share (UK average 11.0pp), resulting in a net loss overall of 3.0pp in their total combined channel share (UK average net loss 2.0pp).

Figure 2.8 Net change in the audience share of the five main PSB channels and their portfolio channels, all homes: 2006 - 2011



Source: BARB, all individuals (4+)
Notes: i) 'PSB portfolio channels' includes all the main PSBs' multichannel channels (except for the five terrestrial channels).
ii) In 2010 a new BARB panel was introduced, including the re-defining of boundaries. Therefore, pre- and post-panel change data should be compared with caution.

UTV's early evening news bulletin performed relatively strongly, attracting an average 34% share

Across 2011, BBC Northern Ireland's early evening regional news bulletin attracted an average 26% share of TV viewing in Northern Ireland. UTV's counterpart bulletin continued to attract a comparatively higher share (34%) – nearly double Channel 3's UK average (18%) and significantly higher than achieved in any of the other nations.

Figure 2.9 BBC One and ITV1/ STV/ UTV/ ITV Wales early evening nations news bulletin shares, all homes: 2011

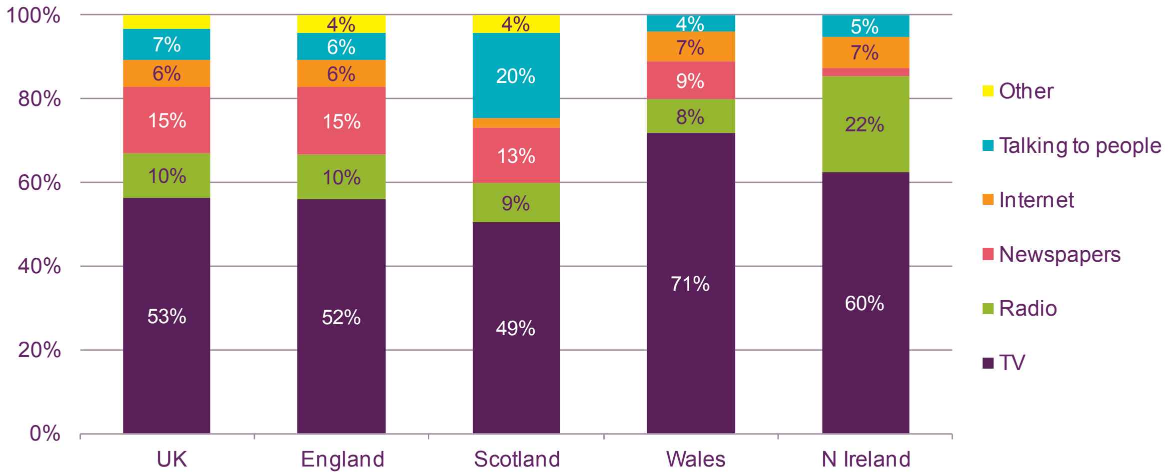
Source: BARB, all individuals(4+)
Note: Based on regional news programmes, start time 17:55-18:35, 10mins+ duration, BBC One and ITV1, weekdays

Adults in Northern Ireland are most likely to state TV as their 'main source' of local news and nations' news

In 2011, 60% of adults in Northern Ireland stated TV as their main source of local news, higher than the UK average of 53% and the second highest of all the nations, behind Wales at 71%. Radio was the second most-mentioned, at 22%, significantly higher than the UK average of 10% and among adults in the other nations. Conversely, newspapers were mentioned by only 2% of adults in Northern Ireland, much lower than the UK average of 15% and of that in the other nations.

Figure 2.10 Main sources of local news for each nation

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

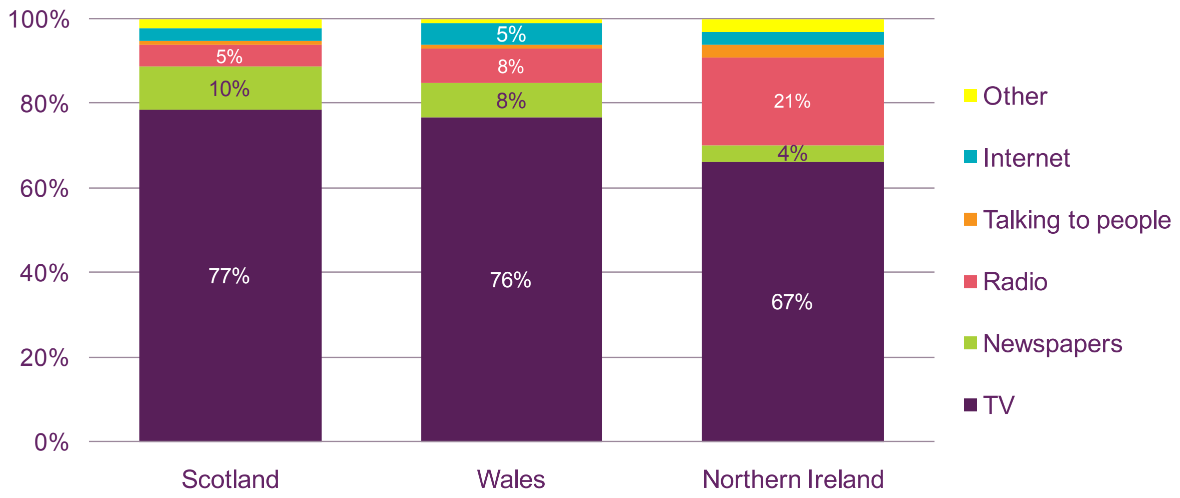


Source: Ofcom media tracker 2011.
Base: All adults; England (1,369); Scotland (172); Wales (107); Northern Ireland (106).
Only responses ≥ 4% labelled

In 2011, television was the most-mentioned main source for nations' news among adults in Northern Ireland, considerably lower than in Scotland (77%) and Wales (76%). Conversely, just over one-fifth of adults (21%) stated radio as their main source; significantly higher than in Wales (8%) and Scotland (5%).

Figure 2.11 Main sources of nations' news for each nation

'Can you tell me what, if anything, is your *main* source of news about what is going on in [Scotland, Wales, Northern Ireland]?'



Source: Ofcom media tracker 2011.
Base: All adults in Scotland (172); Wales (107); Northern Ireland (106).
Only responses ≥ 4% labelled

2.5 TV programming for viewers in Northern Ireland

The following section outlines spend and hours of programming for viewers in Scotland, Wales, Northern Ireland, and the English regions provided by the BBC and UTV/STV/ITV. The figures exclude Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC. For information on Irish language programming by the Irish Language Broadcast Fund (ILBF), see section 2.7.

Programme definitions

First-run originations - Programmes commissioned by or for a licensed public service channel with a view to their first showing on television in the United Kingdom in the reference year.

First-run acquisitions - A ready-made programme bought by a broadcaster from another rights holder and broadcast for the first time in the UK during the reference year.

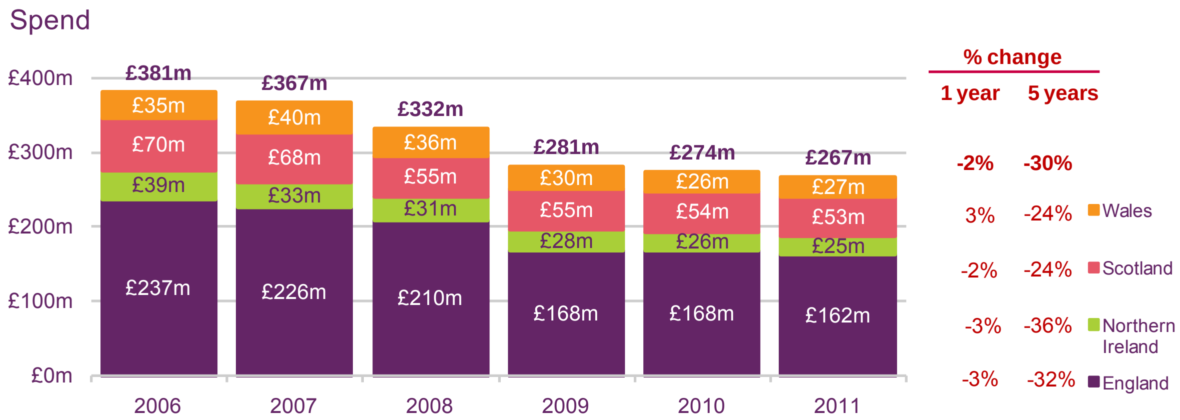
Repeats - All programmes not meeting one of the two definitions above.

Spend on first-run originated programming down by 36% since 2006 in Northern Ireland

£267m was spent by the BBC and ITV/STV/UTV on producing first-run originated programmes specifically for viewers in Wales, Scotland, Northern Ireland and the English regions in 2011, down by £7m (or 2%) from 2010 and down by 30% since 2006.

Spend on nations' programmes for viewers in Northern Ireland was down by 36% since 2006, giving Northern Ireland the largest relative decrease across the nations over a five-year period. Year-on-year figures show a 3% decline, which is roughly in line with the UK figure (down 2% year on year).

Figure 2.12 Spend on first-run originated nations' and regions' output by the BBC/ITV/STV/UTV



Source: Broadcasters. All figures expressed in 2011 prices.
Note: Spend data for first-run originations only. Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC. This does not account for spend on BBC ALBA or BBC spend on S4C output. For information on Irish language programming by the Irish Language Broadcast Fund (ILBF), please see Figure 2.19.

Northern Ireland total spend on current affairs is down by 36% since 2006 – the largest decrease across the four nations

Turning to total spend on programming for viewers in Northern Ireland, over the five-year period, spend for current affairs programming decreased by 36%, compared to the UK average decline of 26% over the same period.

By genre, the steepest proportional decline in spending *over one year* in Northern Ireland was also in current affairs, down by 23%.

Figure 2.13 Change in total spend on nations' and regions' output, by genre and nation: 2006 - 2011

	UK		England		N. Ireland		Scotland		Wales	
	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)
Current Affairs	-13%	-26%	-13%	-31%	-23%	-36%	-8%	5%	-13%	-26%
News	-3%	-22%	-4%	-23%	-4%	-25%	-3%	-20%	2%	-3%
Non-news/non-current affairs	2%	-43%	-16%	-88%	2%	-42%	2%	-27%	7%	-35%
Total Spend in 2011	£272m		£165m		£25m		£55m		£27m	

	UK		England		N. Ireland		Scotland		Wales	
	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr
Change in Spend	-3%	-29%	-5%	-30%	-3%	-36%	-1%	-23%	3%	-24%

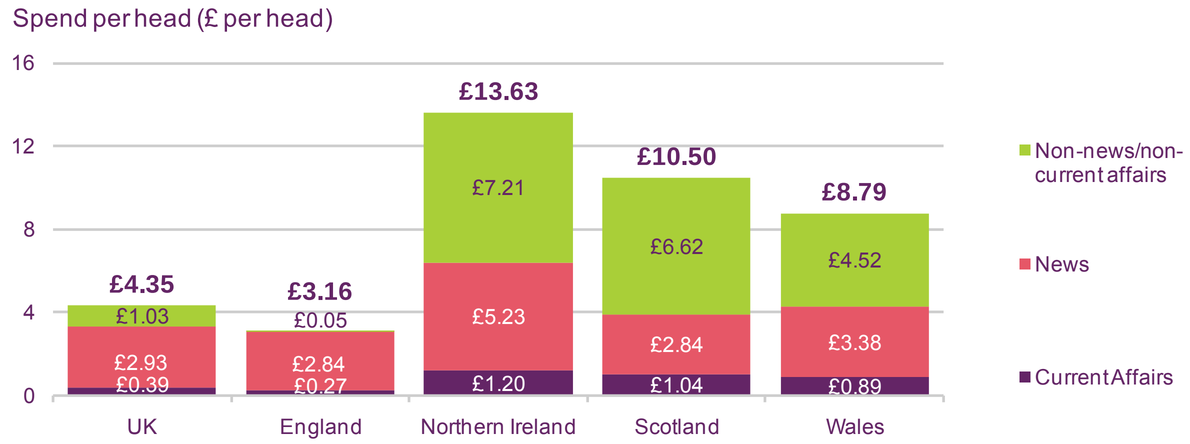
Source: Broadcasters. All figures expressed in 2011 prices.
Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC. This does not account for spend on BBC ALBA or BBC spend on S4C output.

Northern Ireland has highest spend per head on nations' and regions' output in 2011

Expenditure per head of population on nations' and regions' output was highest in Northern Ireland at £13.63 (£14.2 per head in 2010) compared to the UK average of £4.35, and reflecting the fact that Northern Ireland has the smallest population of all the nations in the UK.

At £7.21, non-news/non-current affairs accounts for the majority of spend per head in Northern Ireland.

Figure 2.14 Total spend per head by the BBC/ITV1/STV/UTV on nations/regions output



Source: PSB returns. Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC. This does not account for spend on BBC ALBA or BBC spend on S4C output.

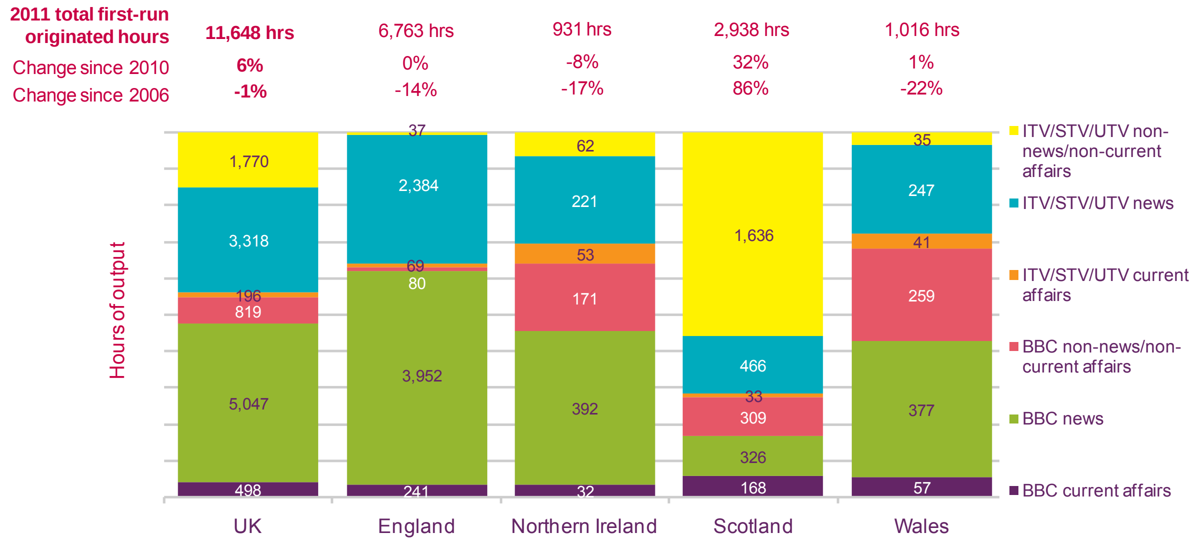
The number of first-run originated hours for viewers in Northern Ireland decreased by 17% between 2006 and 2011

The BBC and ITV1/STV/UTV produced a total of 11,648 hours of first-run originated content for the English regions, Scotland, Wales and Northern Ireland in 2011, up 6% (or 651 hours) from 2010, and showing minimal change since 2006 (down 1%).

The number of first-run originated hours produced specifically for viewers in Northern Ireland saw a 17% decrease from 2006 (down by 187 hours). Over a one-year period, the number of first-run hours decreased by 8%, compared to the UK-wide average increase of 6%.

Note: UTV output for current affairs in Northern Ireland increased by 13% to 53 hours in 2011, boosted by coverage of the Northern Ireland Assembly Elections.

Figure 2.15 Hours of first-run originated nations/regions output, by genre and broadcaster: 2011



Source: PSB returns
Note: Hours data for first-run originations only. Hours excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC. This does not include total hours for BBC ALBA or BBC hours on S4C output.

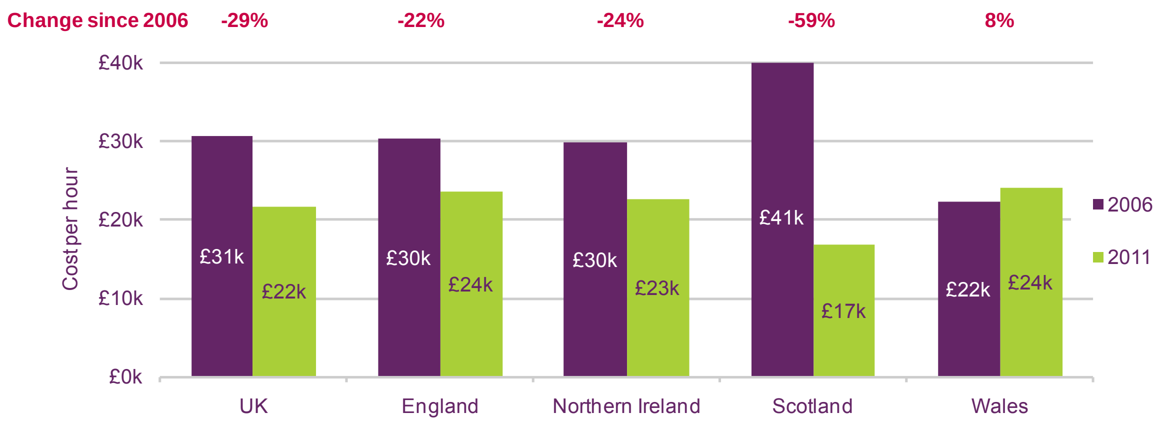
Cost per hour of nations' output decreased 24% year on year in Northern Ireland

Analysing the cost of making programmes for the nations, cost per hour calculations show that England, Northern Ireland and Scotland produced programmes more cost-effectively in 2011 than in 2006.

Over the five-year period, cost per hour decreased by 24% in Northern Ireland, compared to the UK average reduction of 29%.

However, Northern Ireland's average cost per hour increased by 2% year on year, from £22,000 per hour in 2010 to £23,000 per hour in 2011.

Figure 2.16 Cost per hour – total nations/regions output, by nation



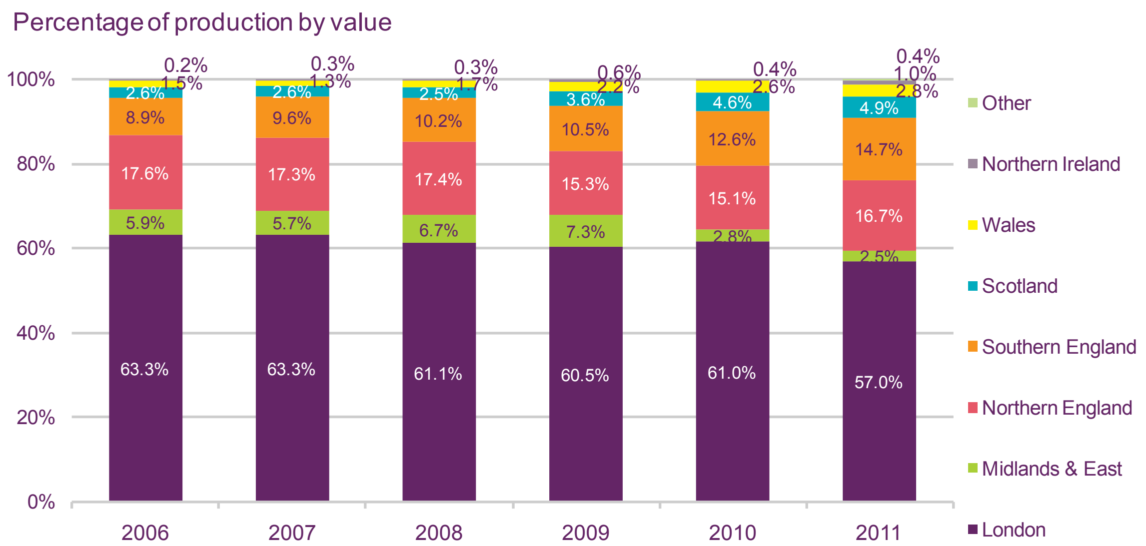
Source: Broadcasters. All figures expressed in 2011 prices.
Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC. This does not include hours or spend on BBC ALBA or BBC hours and spend on S4C output.

2.6 PSB television quota compliance

Figure 2.17 illustrates the distribution of spend on qualifying originated network content in 2011 by the five main PSB channels. Fifty-seven per cent of qualifying expenditure was devoted to productions made within the M25 - down from 61% in 2010. A further 16.7% of first-run spending was captured by producers based in the North of England and 14.7% in Southern England.

In Northern Ireland, originated programming increased from 0.4% of total spending on first-runs to 1%. In Scotland, originated programming accounted for 4.9% of expenditure on network programming, up from 4.6% in 2010. In Wales, the figure rose from 2.6% to 2.8% in 2011.

Figure 2.17 Expenditure on network out-of-London production: 2006-2011

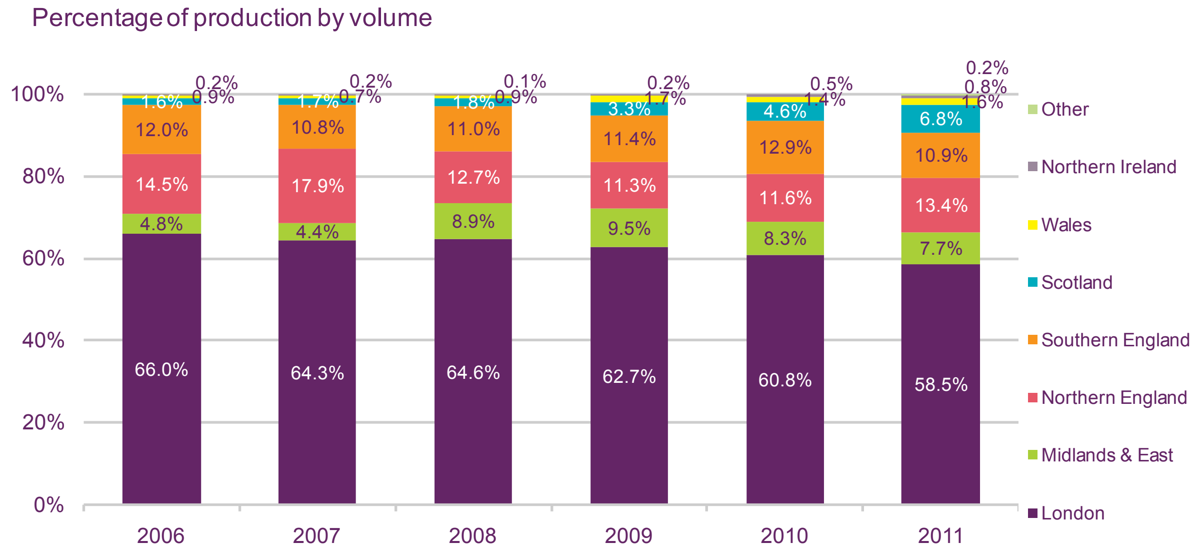


Source: Ofcom/broadcasters.
Note: A new category labelled 'other' on the chart has been created for regional productions from London producers which do not meet both 70% of spend and 50% of talent in any one particular macro region. See http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg_prod/ on the Ofcom website for further details.

In terms of volume, 58.5% of originated network programmes in 2011 were produced within the M25, down from 60.8% in 2010. A further 13.4% was produced in Northern England, 10.9% in Southern England and 7.7% in the Midlands and East.

Producers in Scotland delivered 6.8% of all hours in 2011, up from 4.6% in 2010, while the comparable figure for Wales was 1.6% (up from 1.4% in 2010). First-run hours produced in Northern Ireland increased to 0.8% in 2011 (Figure 2.18).

Figure 2.18 Volume of network out-of-London production, 2006-2011



Source: Ofcom/broadcasters.
Note: A new category 'Other' has been created for regional productions from London producers which do not meet both 70% of spend and 50% of talent in any one particular macro region. See http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg_prod/ on the Ofcom website for further details.

2.7 Irish-language programming

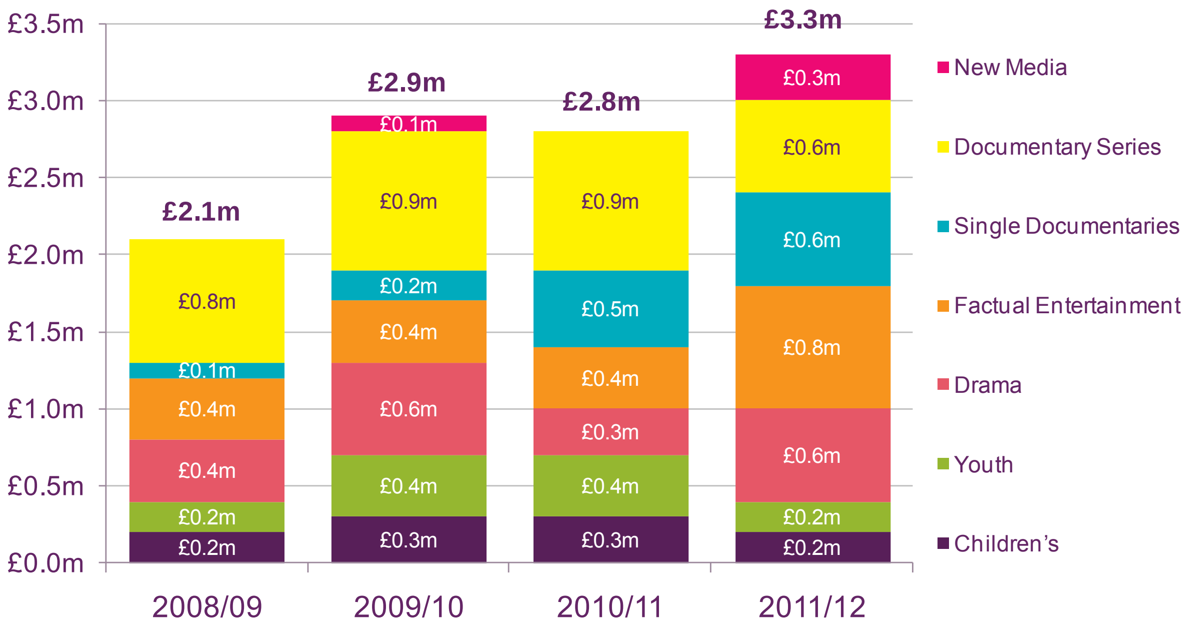
Spend by the ILBF on Irish-language programming is up 18% year on year

The Irish Language Broadcast Fund (ILBF) was set up with two aims: to fund Irish-language content of high quality and to foster the Irish-speaking independent production sector in Northern Ireland.

The fund finances a minimum of 60 hours of Irish-language content per year, which is broadcast on BBC Northern Ireland, TG4 & RTÉ. The ILBF also provides funding for a range of training initiatives for Irish speakers wishing to work, or already working, in the production sector in Northern Ireland.

ILBF spend on factual entertainment, drama and new media saw the most notable year-on-year increases, while spend on documentary series and youth programming fell.

Figure 2.19 Spend by the ILBF on Irish-language programming



Source: ILBF. Includes all programmes.

3 Radio and audio content

3.1 Recent developments in Northern Ireland

Community radio

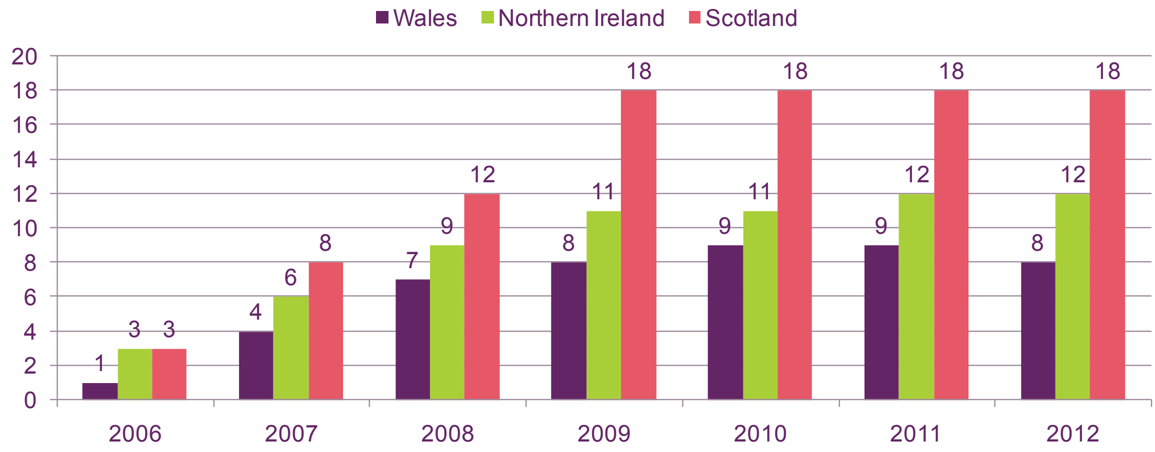
Ofcom began a third round of community radio licensing in Northern Ireland in March. There are currently 12 community radio stations operating in Northern Ireland, which are among almost 200 across the UK. (Figure 3.1)

They reflect a diverse mix of cultures and interests. For example, in Northern Ireland listeners can listen to stations which cater for Irish-language interests, with others ranging from student radio to services aimed at religious communities.

They typically cover a small geographical area with a coverage radius of up to 5km, and are run on a not-for-profit basis.

Figure 3.1 Number of community radio stations on air: 2006-2012

	2006	2007	2008	2009	2010	2011	2012
England	29	72	95	126	146	160	159
UK	36	90	123	163	184	199	197



Source: Ofcom, April 2012

Commercial radio

Northern Media Group (NMG), which owned the three Q Network commercial stations and their three sister stations: Five, Six, and Seven FM, consolidated the stations under the Q Network brand following a restructuring of the business.

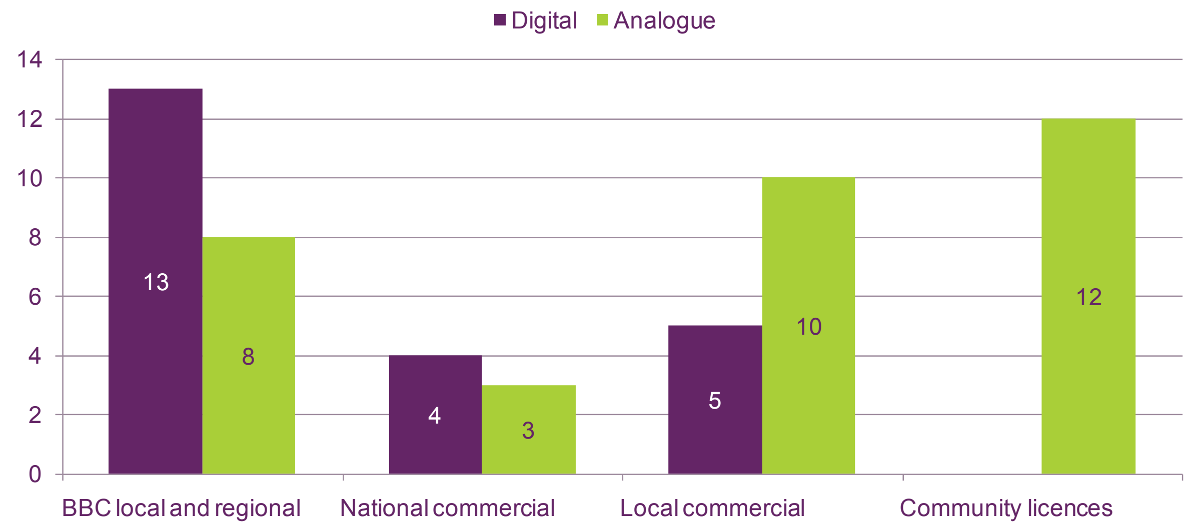
These six stations broadcast at a sub-regional level – Londonderry, Coleraine, Omagh / Enniskillen, Ballymena, Cookstown, and Newry. They transmit mainly networked output with some localised programming, as well as local news, sport and travel.

3.2 Radio service availability

Digital radio listeners in Northern Ireland can access up to 22 DAB stations. These include the networked and regional BBC services, Classic FM, talkSPORT, UCB UK, and simulcasts of four local commercial stations (Downtown Radio, Cool FM, Q102.9FM and City Beat) (Figure 3.2).

There are also ten local commercial stations and 12 community radio stations currently broadcasting in Northern Ireland.

Figure 3.2 Availability of radio stations in Northern Ireland



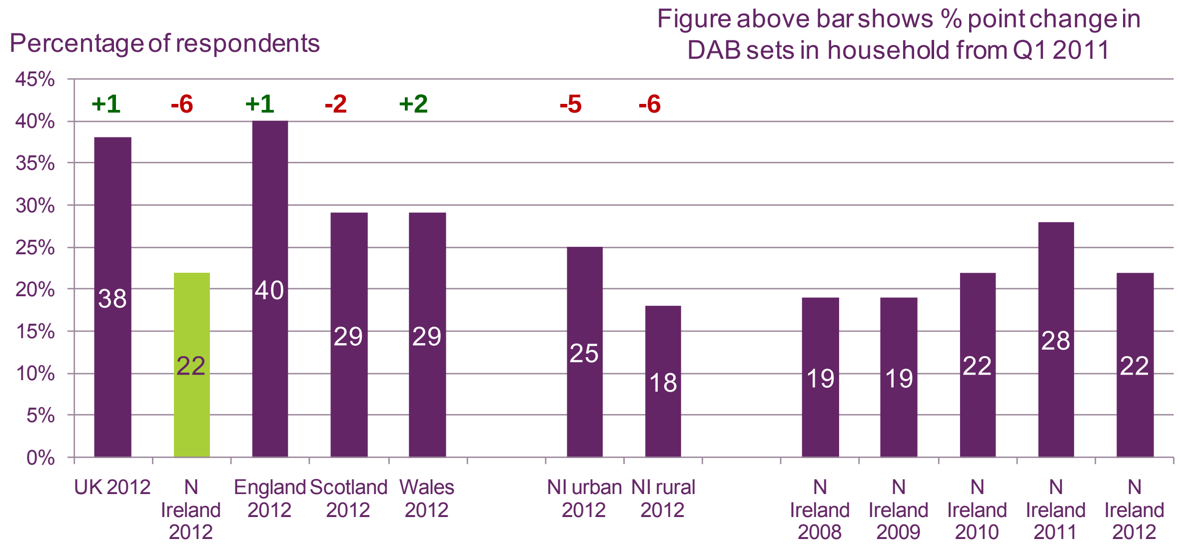
Source: Ofcom, April 2012
Note: This chart shows the maximum number of stations available; local variations and reception issues mean that listeners may not be able to access all of these

3.3 Digital radio set ownership

According to Ofcom research, nearly four in ten UK households claimed to have access to a DAB radio set in the home in Q1 2012; a similar level to the previous year. However, take-up varies significantly across the UK, being significantly higher in England (at 38%) than the other UK nations. Figure 3.3 shows that take-up is lowest in Northern Ireland (22%), especially in rural areas (18%), where there is a more limited choice of stations. The lower take-up is reflected in the share of listening hours through digital and analogue platforms. Listening on digital platforms in Northern Ireland accounted for 17% of radio listening hours in 2011, significantly lower than the UK average. (Figure 3.4)

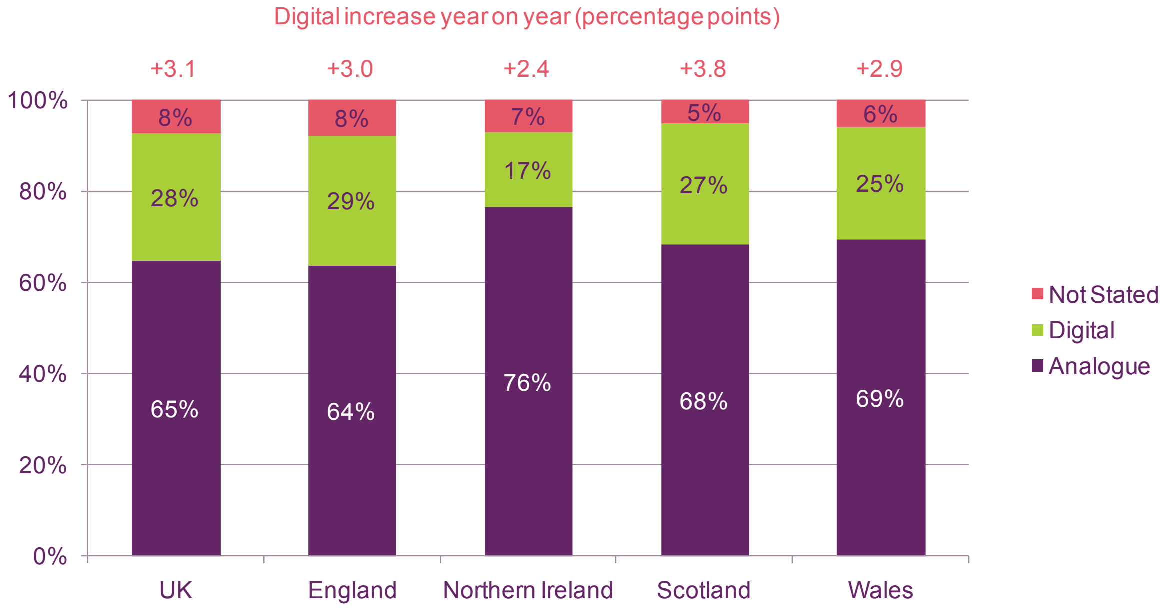
The apparent fall of six percentage points in DAB take-up (from 28% in 2011 to 22% in 2012) is within the error margins of the survey and should not therefore be considered significant.

Figure 3.3 Ownership of DAB digital radios



Source: Ofcom research, Quarter 1 2012
Q4. You said earlier that you have (NUMBER) radio sets in your home that someone in the household listens to in most weeks. How many of these radio sets are digital radios?
Base: Adults aged 16+ who listen to radio (n = 2963 UK, 404 Northern Ireland, 1790 England, 364 Scotland, 405 Wales, 212 Northern Ireland urban, 192 Northern Ireland rural, 539 Northern Ireland 2008, 569 Northern Ireland 2009, 653 Northern Ireland 2010, 428 Northern Ireland 2011, 404 Northern Ireland 2012)
Note: Remaining percentages are Don't know responses.
NB. Data in 2011 based on those who listen to radio and have any radio sets in the household that someone listens to in most weeks.

Figure 3.4 Share of radio listening hours via digital and analogue platforms: 2011



Source: RAJAR, All adults (15+), year ended Q4 2011

3.4 Patterns of listening to audio content

Radio reach in Northern Ireland is close to the UK average

Among adults in Northern Ireland, average weekly radio listening in 2011 stood at 22 hours, slightly lower than the UK average of 22.5 hours. Radio services reached 90.1% of the adult population, 1 percentage point lower than the UK average of 91.1%. (Figure 3.5)

Figure 3.5 Average weekly reach and listening hours: year to Q4 2011

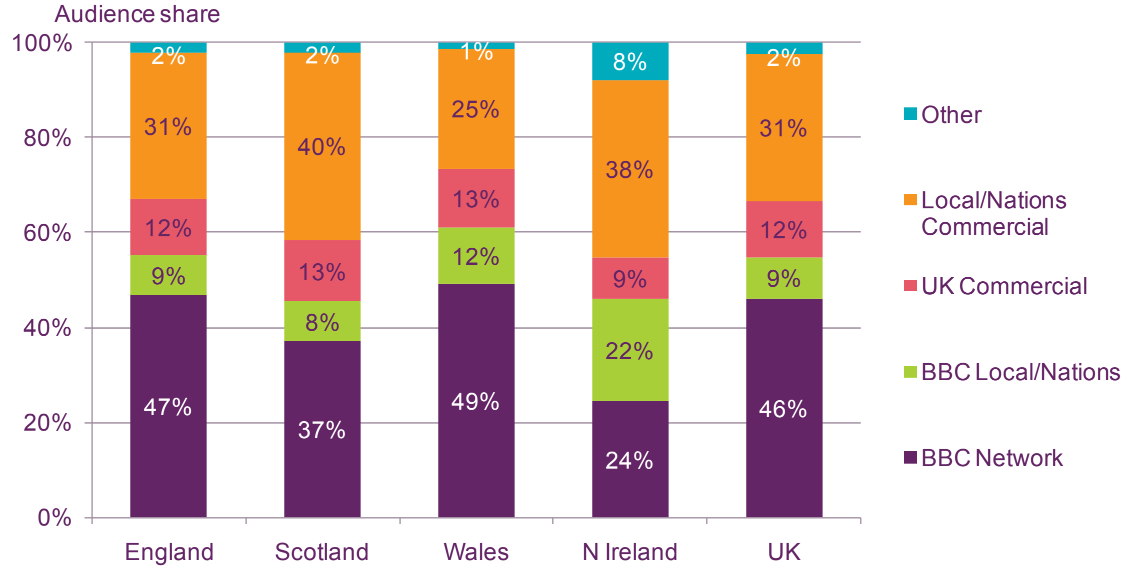
	England	Scotland	Wales	Northern Ireland	UK TOTAL
Average weekly listening	22.5 hours	21.4 hours	23.2 hours	22.0 hours	22.5 hours
Reach	91.1%	87.3%	93.2%	90.1%	91%

Source: RAJAR, All adults (15+), year ended Q4 2011. Reach is defined as a percentage of the respective adult population who listen to a station for at least five consecutive minutes in the course of an average week

BBC local stations are more popular in Northern Ireland than in other nations

In 2011, BBC local stations accounted for 22% of total radio listening hours in Northern Ireland, significantly higher than across any other UK nation and higher than the UK average of 9%. This is consistent with findings in previous years and is explained by the relatively high share of Radio Ulster/Foyle. The BBC networked stations accounted for a share of listening of 24%, much lower than any of the other nations and significantly lower than the UK average of 46%. The share of other stations, which includes small community and commercial stations and is likely to include cross-border listening to the Republic of Ireland's national broadcaster RTÉ, was 8%. This is higher than the rest of the UK where the average share of other stations was 2%. (Figure 3.6)

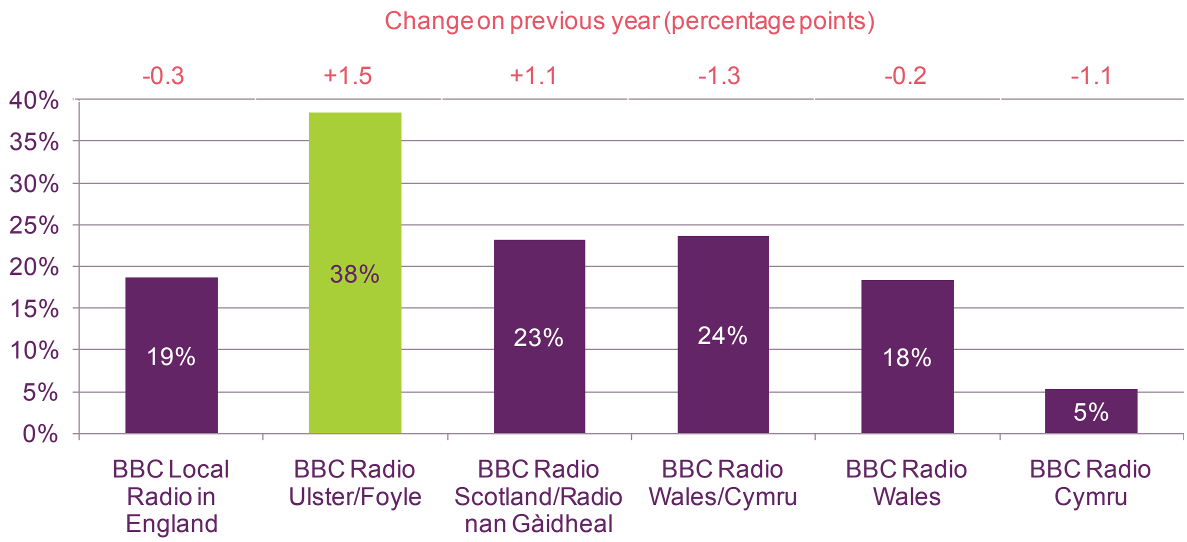
Figure 3.6 Share of listening hours, by nation: year to Q4 2011



Source: RAJAR, All adults (15+), year ended Q4 2011
Note: BBC Local/Nations includes both BBC Scotland and Radio Nan Gaidheal; BBC Radio Wales and Radio Cymru, and BBC Ulster and Radio Foyle

Over one-third (38%) of adults listened to BBC Ulster/Foyle in an average week in 2011. The figure rose by 1.5 percentage points and remains the highest reach of the BBC's national services and higher than the average local BBC radio audience in England. (Figure 3.7)

Figure 3.7 Weekly reach for national/local BBC services



Source: RAJAR, All adults (15+), year ended Q4 2011. Reach is defined as the total proportion of the adult population within each respective TSA who listed to at least five consecutive minutes in the average week.

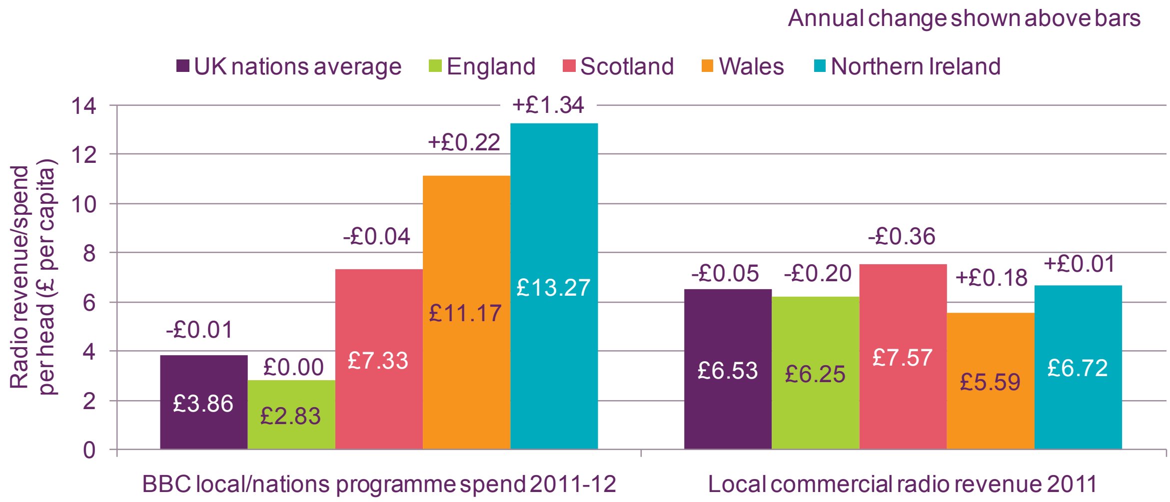
3.5 The radio industry

Commercial radio revenue and BBC Radio funding in Northern Ireland

The commercial revenues generated by local radio stations in Northern Ireland reached £12.1m in 2011. By adjusting for population size, we can see that Northern Ireland has higher revenue per head of population than the UK average at £6.72, a £0.01 increase on 2010. (Figure 3.8)

BBC Radio spend on BBC Radio Ulster and BBC Radio Foyle totalled £23.8m in 2011/12. Expenditure per head in Northern Ireland is the highest among the UK nations, and increased by 10% on the previous year to reach £13.27. This is due to the smaller population in Northern Ireland and the added expenditure of running two services.

Figure 3.8 Local/nations' radio spend and revenue per head of population: 2011/12



Source: Broadcasters
Note: The UK total shows the average for local commercial radio across the four nations and therefore excludes revenues for the UK-wide commercial stations: Classic FM, talkSPORT and Absolute.

4 Internet and web-based content

4.1 Broadband take-up

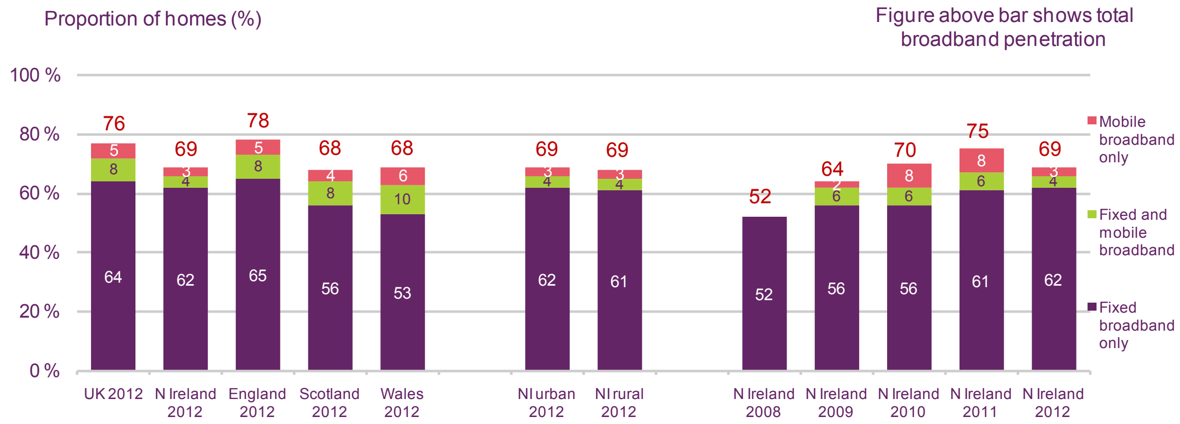
Fixed broadband take-up remains stable, while mobile dongle-based broadband falls

Overall take-up of broadband services (fixed-line and/or mobile) in Northern Ireland stood at 69% of households in Q1 2012. Year on year, there has been a fall in the proportion of households with mobile broadband (via a dongle or in-built connectivity in a laptop or tablet) from 13% in Q1 2011 to 7% in Q1 2012. However, the proportion of homes with fixed-line broadband has remained stable at 66%[4].

At the same time, as is shown in Figure 4.3, there has been an increase in the proportion of adults using their mobile phone to access the internet. This suggests that, with the rise in smartphone ownership (see Figure 5.7), the decrease in mobile broadband ownership may be partially explained by a small proportion of consumers who are using their phone instead of other mobile platforms to access the internet.

While broadband penetration is behind the UK average (76%), it is in line with Scotland and Wales (both 68%). Take-up in Northern Ireland does not vary between urban or rural areas, with penetration at 69% in both.

Figure 4.1 Broadband take-up at home



Source: Ofcom research, Quarter 1 2012
Base: All adults aged 16+ (n = 3772 UK, 508 Northern Ireland, 2251 England, 500 Scotland, 513 Wales, 255 Northern Ireland urban, 253 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012)
QE9. Which of these methods does your household use to connect to the internet at home? (NB 2008 survey did not cover mobile broadband. 2008 measure shows any broadband)

Over-55s in Northern Ireland are less likely to have broadband than in the UK

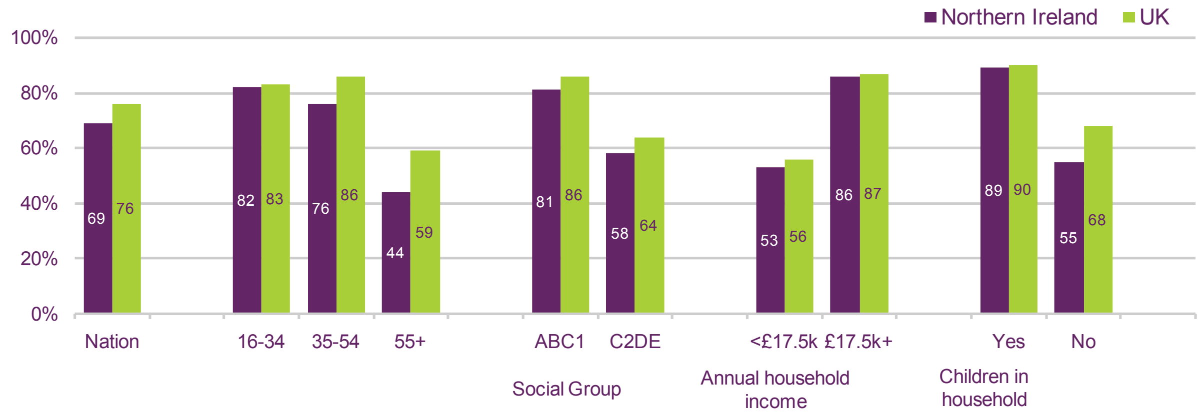
Figure 4.2 shows how, as with the rest of the UK, broadband penetration varies significantly by demographic factors. Nearly nine in ten households with children, and over eight in ten adults aged 16-34 or in the AB social group have access to broadband services at home.

[4] While the fall in overall broadband take-up in Northern Ireland is within the survey's error margins, there has been a significant fall in mobile broadband take-up, while fixed broadband take-up remains stable.

This compares to less than half (44%) of those aged 55+; significantly lower than the comparable figure for the UK (59%).

Take-up is also relatively low among the DE socio-economic groups (54%), and in households with incomes less than £17.5k per annum (51%).

Figure 4.2 Broadband take-up in Northern Ireland, by demographic



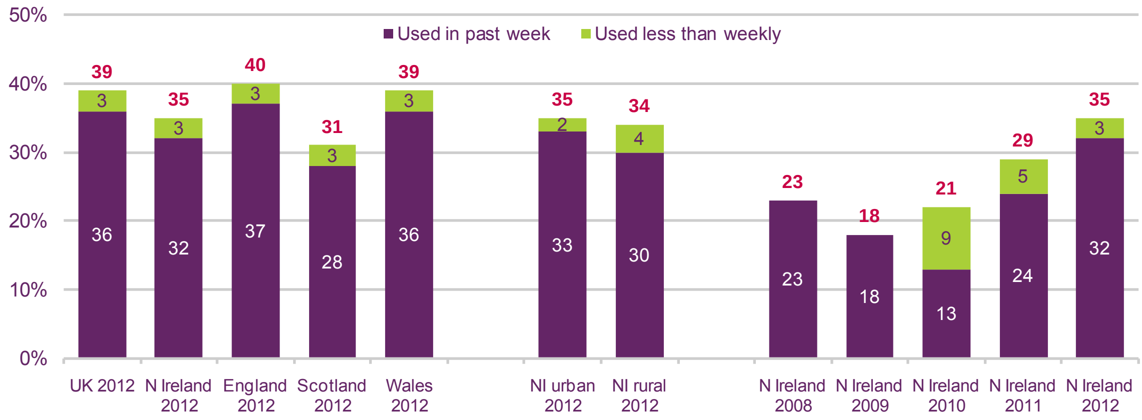
Source: Ofcom research, Quarter 1 2012
Base: All adults aged 16+ (n =508 Northern Ireland, 167 16-34s, 179 35-54s, 162 55+, 220 ABC1, 288 C2DE, 201 <£17.5k income, 139 £17.5k+, 221 children in home, 287 no children in home)
QE9. Which of these methods does your household use to connect to the Internet at home?

4.2 Internet-enabled devices

Over a third of adults in Northern Ireland access the internet on their mobile phone

With the increasing adoption of smartphones (up from 21% to 34% of adults in Northern Ireland) there has been an increase in the use of mobile phones to access the internet. In Q1 2012, over a third (35%) of adults in Northern Ireland said that they used a mobile phone handset to access the internet (up from 29% in Q1 2011), slightly behind the UK average of 39%.

Figure 4.3 Use of mobile phone to access the internet



Source: Ofcom research, Quarter 1 2012
Base: All adults aged 16+ (n = 3772 UK, 508 Northern Ireland, 2251 England, 500 Scotland, 513 Wales, 255 Northern Ireland urban, 253 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012)
QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And, which of these activities have you used your mobile for in the last week? (NB 2008 and 2009 surveys did not cover use in past week – 2008 and 2009 measures show any use)

Just under one in ten adults in Northern Ireland have purchased a tablet computer

Figure 4.4 shows that tablet computer ownership has increased rapidly across the UK in the past year. In Quarter 1 2012, 9% of adults in Northern Ireland claimed to have a tablet PC, such as an iPad or Samsung Galaxy Tab, an annual increase of seven percentage points. Those most likely to have purchased a tablet PC are aged 35-54, from AB social groups/ higher income homes and living in an urban area.

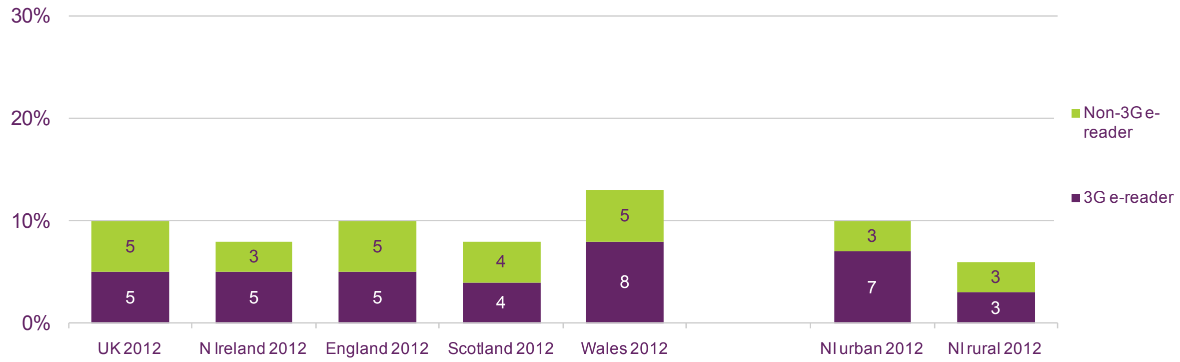
Figure 4.4 Take-up of tablet PCs

Source: Ofcom research, Quarter 1 2012
Base: All adults aged 16+ (n = 3772 UK, 508 Northern Ireland, 2251 England, 500 Scotland, 513 Wales, 255 Northern Ireland urban, 253 Northern Ireland rural, 511 Northern Ireland 2011, 508 Northern Ireland 2012)

Eight per cent of adults in Northern Ireland have an e-reader

As shown in Figure 4.5, 8% of adults in Northern Ireland have an e-reader that they can use to read books, magazines and other text downloaded from the internet, in line with the UK average (10%). Half of those with an e-reader have a built-in 3G connection, which allows them to download books using a mobile network. Those aged between 35 and 54 and in the AB social groups are most likely to own an e-reader.

Figure 4.5 Personal use of e-readers



Source: Ofcom research, Quarter 1 2012
Base: All adults aged 16+ (n = 3772 UK, 508 Northern Ireland, 2251 England, 500 Scotland, 513 Wales, 255 Northern Ireland urban, 253 Northern Ireland rural)
QB1. Which of the following do you, or does anyone in your household, have in your home at the moment?/ QB2. And do you personally use.../ QB6. Does your household's e-reader have built-in 3G access to a mobile network?

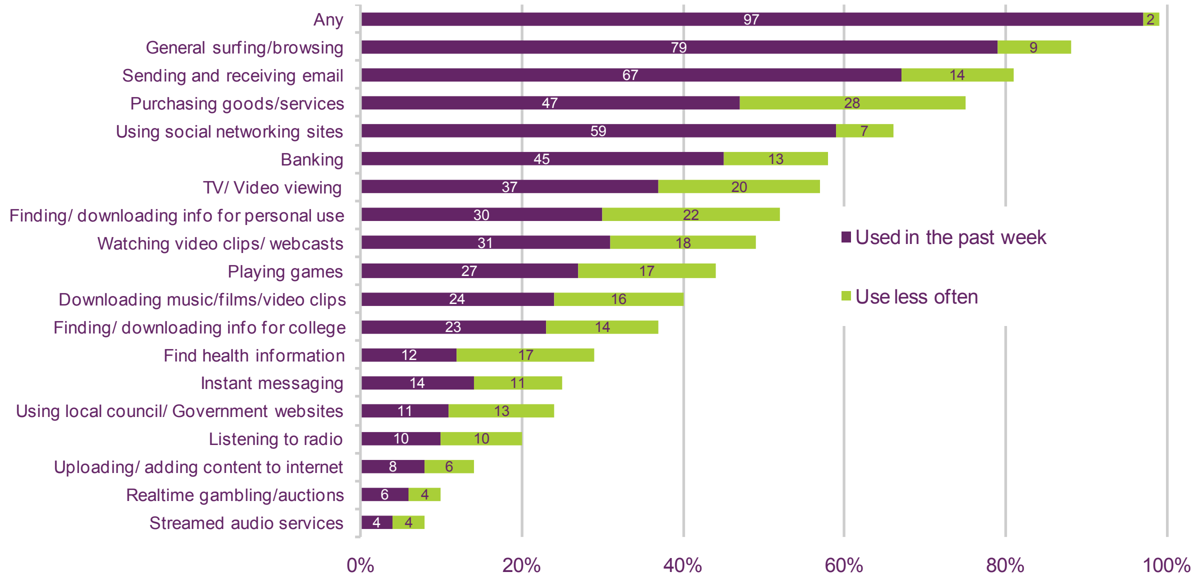
4.3 Internet use

Emailing, shopping and social networking among the most popular uses of the internet

Figure 4.6 shows that over six in ten broadband users in Northern Ireland are using the internet for emailing (80%), purchasing goods or services (72%) and social networking (66%). In total, half (49%) of all adults in Northern Ireland use social networking sites (either on a PC or mobile phone), including Facebook and Twitter; marginally behind the UK average (52% of adults).

Fifty-six per cent of those with broadband at home use their connection to view TV or video clips, while the same proportion engage in internet banking (up by five percentage points since 2011).

Figure 4.6 Use of online applications among broadband users in Northern Ireland



Source: Ofcom research, Quarter 1 2012
Base: Adults aged 16+ with a broadband connection at home (n= 348 Northern Ireland 2012)
QE5. Which, if any, of these do you or members of your household use the internet for whilst at home?

5 Telecoms and networks

5.1 Recent developments in Northern Ireland

Broadband

The Department of Enterprise, Trade and Investment (DETI), working with BT, recently completed its Next Generation Broadband Project. Under this project, street cabinets were connected to local exchanges with high-capacity fibre cabling. The project, which was funded by DETI, the Department of Agriculture and Rural Development and the EU, was supported by £29.8m of investment by BT.[5] With the construction phase complete in the first quarter of 2012:

- a total of 2,461 street cabinets (over 80% of Northern Ireland stock) have been upgraded to deliver fibre-based broadband services, 1,196 of these as a result of the additional BT investment secured under the Next Generation Broadband Project; and
- Ofcom estimates that 87% of homes in Northern Ireland were able to receive fibre-to-the-cabinet (FTTC) services by March 2012.

As of February 2012, take-up of new services in Northern Ireland accounted for 13.9% of all new superfast connections in the UK.[6] In January, Virgin Media announced it was doubling the speed of its broadband services for most of its customers across the UK, with customers in Belfast being among the first to benefit. Virgin Media's upgrade will mean customers currently signed up for its 'up to' 10Mbit/s service will be boosted to 'up to' 30Mbit/s, while those on the company's top tier 'up to' 100Mbit/s tariff will be raised to 120Mbit/s.

Belfast is to become a 'super-connected' city under plans announced by the Chancellor, George Osborne, in the March Budget. The city successfully bid for funding to deliver ultrafast fixed broadband access, and large areas of public wireless connectivity. Ultrafast broadband is defined as having a minimum download speed of at least 80Mbit/s. The city will receive funding of a minimum of £6m and up to a maximum of £13.4m to invest in improved infrastructure.

In January 2012, Onwave won the DETI contract to deliver high-speed satellite broadband services to areas of Northern Ireland where broadband cannot be accessed via telephone lines. The contract is part of DETI's 100% broadband availability commitment.

The service means that customers can get downloads speeds of up to 6Mbit/s wherever they live, with packages for businesses allowing download speeds of up 8Mbit/s or 10Mbit/s.

Telecoms

A £25m investment in mobile infrastructure, announced in February, is set to boost 2G and 3G mobile coverage in Northern Ireland. Everything Everywhere, 3UK, and Mobile Broadband Network Limited are jointly funding the initiative.

When the upgrade is completed at the end of 2012, the companies predict 3G coverage at 94%, a significant improvement on existing levels and in network performance and customer experience.

[5] http://www.detini.gov.uk/deti-telecoms-index/deti--telecoms-next-gen-broadband-project.htm
[6] BT Ireland

5.2 Availability of broadband services

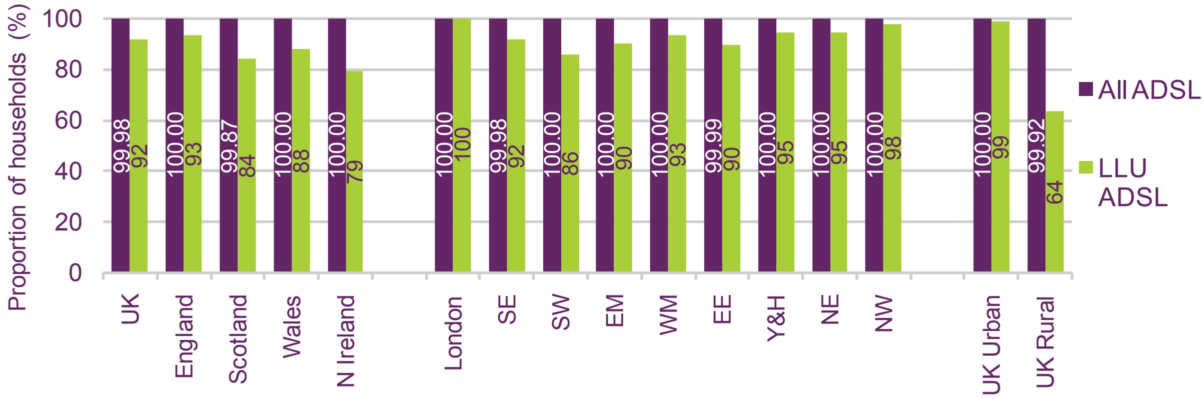
All homes in Northern Ireland are connected to an ADSL-enabled BT local exchange

By the end of 2011 almost all UK homes were connected to an ADSL-enabled BT local exchange, although some people may not be able to receive ADSL broadband services, or may only be able to do so at very slow speeds, as a result of the long length or poor quality of the copper telephone line from their premises to the local exchange. In Northern Ireland (as in Wales) all of BT's exchanges have been upgraded to offer ADSL broadband, and of BT's 5,589 local exchanges, only 26 (20 in Scotland, and six in England) had not been upgraded to offer ADSL broadband services by the end of 2011. As a result, the proportion of homes connected to an ADSL-enabled BT exchange was marginally lower in Scotland than in the rest of the UK (Figure 5.1).

Local loop unbundling (LLU) involves an alternative operator placing its own equipment in the incumbent's local exchange. This is then connected to the LLU provider's own backhaul network, and ADSL broadband services are provided over the twisted copper pair, which is leased from the incumbent operator. LLU operators are able to benefit from economies of scale which are not available to them when purchasing wholesale services on a per-unit basis, and have greater opportunity to differentiate the services that they offer from their competitors'. As a result, consumers living in LLU-enabled exchange areas are likely to have a greater choice of ADSL broadband services and, typically, access to lower-cost (particularly bundled) services.

At the end of 2011 92% of UK homes were connected to an LLU-enabled BT exchange, a three percentage point increase on a year previously. LLU roll-out has historically been concentrated in exchange areas serving a large number of premises (which tend to be in urban areas) and as a result of this the proportion of homes connected to an LLU-enabled local exchange was much higher in urban areas (99%) than in rural ones (64%). Northern Ireland had the lowest proportion of households that were connected to an LLU-enabled exchange at the end of 2011, at 79%, while this proportion was highest in England at 93%.

Figure 5.1 Proportion of homes connected to ADSL-enabled and unbundled exchanges: December 2011



Sources: Ofcom/BT, December 2011 data

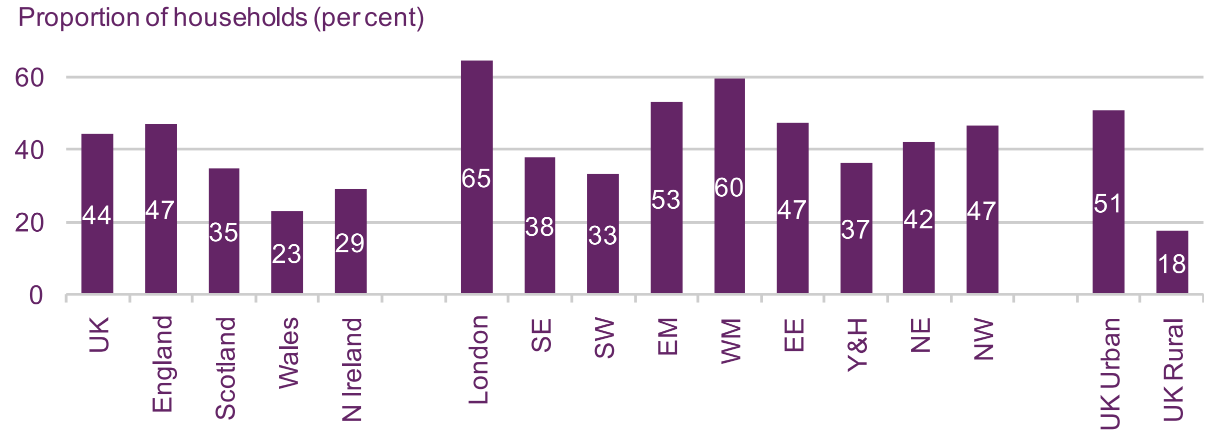
Northern Ireland had the second-lowest availability of cable broadband services in May 2012

Ofcom estimates, based on data provided by Virgin Media, show that 44% of UK homes were passed by Virgin Media's cable broadband network in May 2012. However, this figure will be under-stated as it excludes homes where Virgin Media is not also able to provide fixed voice and pay-TV services (Figure 5.2).[7]

As with the roll-out of LLU broadband services, the original cable franchisees concentrated network deployment in urban areas in order to maximise the number of premises covered by their networks (and therefore their potential customer bases). This is reflected below; household coverage in urban areas was 51%, compared to 18% in rural areas. Northern Ireland had the second-lowest proportion of homes passed by Virgin Media's cable broadband network in May 2012, at 29%, while among the other UK nations availability ranged from 23% in Wales to 47% in England.

All of Virgin Media's cable network is able to provide broadband speeds of 'up to' 100Mbit/s and in January 2012 Virgin announced that it was doubling the speeds of most of its broadband connections in the 18 months from February 2012, thereby increasing the speed of its fastest package to 'up to' 120Mbit/s.[8]

Figure 5.2 Proportion of households passed by Virgin Media broadband



Sources: Ofcom/Virgin Media, May 2012 data

Northern Ireland had the highest availability of fibre-to-the-cabinet services in March 2012

Fibre-to-the-cabinet (FTTC) involves running fibre optic cable from the local exchange to the street cabinet, from which VDSL (a fast form of DSL) is used to transmit data over the twisted copper pair to the customer's premises. Figure 5.3 shows Ofcom estimates of the proportion of UK homes that are able to receive BT FTTC services in March 2012 (there are other FTTC deployments, the most notable of which is South Yorkshire Digital Region, which covers around 440,000 premises in the South Yorkshire area).[9]

BT is currently in the process of rolling out FTTC services, and this is reflected by the fact that in the year to March 2012 our estimate of the proportion of homes able to receive BT FTTC services (or services using BT's FTTC network) increased by 15 percentage points to 31% (these estimates have been adjusted to take into account the fact that not all street cabinets connected to an exchange that has been upgraded to offer FTTC have fibre run to

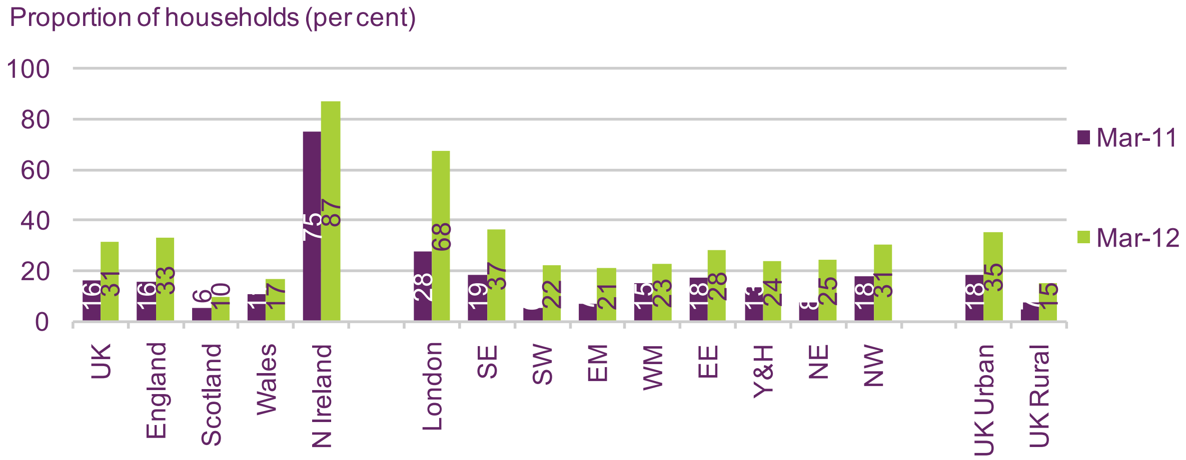
[7] While the most recent data available to Ofcom show that 44% of UK homes were able to receive triple-play cable services from Virgin Media in May 2012, data from 2010 show that in total 48% of UK homes were able to receive Virgin Media cable broadband in June of that year.
[8] http://mediacentre.virginmedia.com/Stories/Virgin-Media-boosts-Britain-s-broadband-speeds-2322.aspx
[9] http://www.digitalregion.co.uk/digital-region-wholesale/the-networkrollout

them). BT's FTTC service had a headline speed of 'up to' 40Mbit/s at launch, and in April 2012 it upgraded its FTTC network to offer 'up to' 80Mbit/s.[10]

In urban areas of the UK 35% of UK homes were able to receive BT FTTC services by March 2012, more than twice the proportion that could do so in rural areas (15%). Northern Ireland had the highest estimated proportion of homes able to receive FTTC services from BT in March 2012, at 87%, over eight times higher than the 10% figure for Scotland, where availability was lowest. The availability of BT's FTTC services was higher in Northern Ireland than in the other UK nations as a result of a Department of Enterprise, Trade and Investment (DETI) initiative to increase the availability of fibre-based broadband services.

BT is also deploying fibre-to-the-premises (FTTP) services, and by the end of 2011 its FTTP network, which offers speeds of 'up to' 110Mbit/s, covered around 50,000 UK homes.[11] BT intends to make its superfast broadband services available to two-thirds of UK premises using a mixture of FTTC and FTTP, and in October 2011 it announced that this goal would be attained by the end of 2014, a year sooner than originally planned.[12]

Figure 5.3 Estimated proportion of households able to receive BT FTTC services



Sources: Ofcom/BT

Northern Ireland had the highest availability of superfast broadband services in March 2012

Superfast broadband is defined as those connections with a headline 'up to' speed of 30Mbit/s or more, and by overlaying Virgin Media cable broadband availability data onto that of BT's FTTC network we are able to estimate the overall availability of superfast services. Again, it should be noted that the figures below will be slightly under-stated as they exclude BT's FTTP network, homes where Virgin Media is not also able to provide fixed voice and pay-TV cable services, and other smaller-scale fibre deployments (such as Titanic Quarter in Belfast).

We estimate that by March 2012 60% of UK homes were able to receive superfast broadband services, up from 53% a year previously, largely as a result of BT's ongoing FTTC roll-out (Figure 5.4). Household availability of superfast broadband in rural areas (28%) was less than half that in urban areas (67%) by March 2012, and Northern Ireland had

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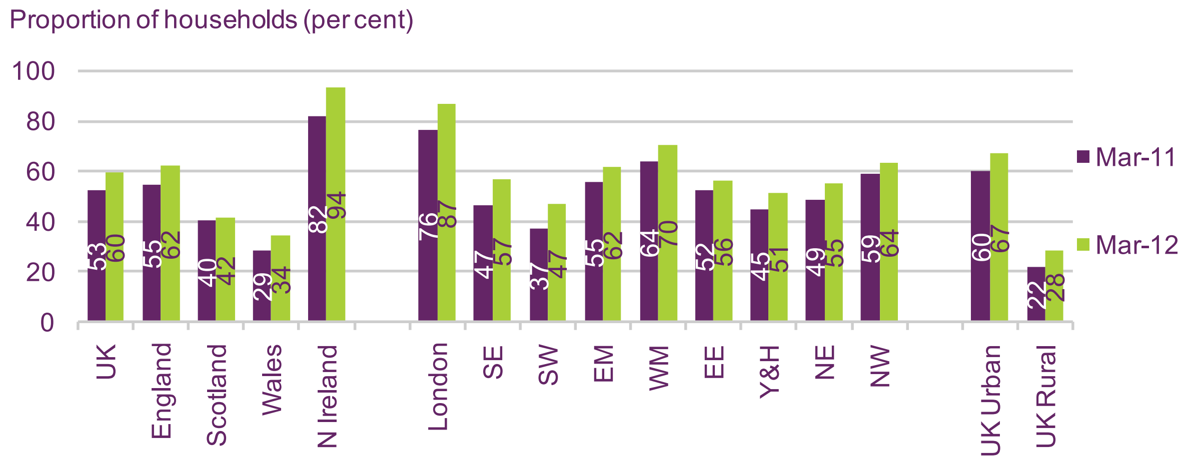
[10] http://www.btplc.com/News/ResultsPDF/q411release.pdf
[11] http://www.btplc.com/Sharesandperformance/Quarterlyresults/PDFdownloads/q312_transcript.pdf
[12] http://www.btplc.com/news/articles/showarticle.cfm?articleid=%7Bd228f2b4-25fc-4095-8ec4-bd17b903cc3b%7D

the highest estimated proportion of homes able to receive superfast services among the UK nations, at 94%. Conversely, the availability of FTTC and/or cable superfast broadband was lowest in Wales, where an estimated 34% of homes were able to receive such services.

Figure 5.4 Estimated proportion of households able to receive superfast broadband services



Sources: Ofcom/BT/Virgin Media

5.3 Mobile coverage

Twelve per cent of premises have no 3G mobile coverage from any operator

Although 92% of UK adults have a mobile phone, according to Ofcom's market research, there remain areas of the country where a lack of network coverage means that making mobile phone calls, sending text messages or accessing the internet from a mobile device is not possible. These areas, sometimes known as 'mobile not-spots', are often characterised by low population density and/or undulating terrain, presenting physical and economic obstacles that may deter mobile network operators from installing mobile phone masts in those areas.

In other areas of the UK, some operators have installed masts and provide a mobile service where other operators do not have a presence, leading to the creation of 'partial not-spots'.

Figure 5.5 and Figure 5.6 detail levels of mobile coverage based on premises (homes and offices) for 2G and 3G services respectively. 3G is often considered as the minimum necessary to provide a satisfactory experience of mobile internet, but 2G is satisfactory for telephone calls and text messaging.

How we measure the availability of mobile telephony in this report

The coverage information presented in Ofcom's *Communications Market Report*, Nations and Regions reports and *Infrastructure Report* is collected by Ofcom from the four mobile network operators. Information on coverage is provided by each operator for each 200x200metre pixel of landmass across the UK. This information is correlated with maps of premises to give the premises coverage figures. This new methodology is different to that used in previous *Communications Market Reports* and therefore figures should not be compared with previous years.

Figure 5.5 shows that, across the UK, 93.6% of premises have coverage outside the building from all three 2G network operators (Everything Everywhere, O2 and Vodafone). A small proportion of premises in the UK – 0.3% - do not have 2G coverage from any operator.

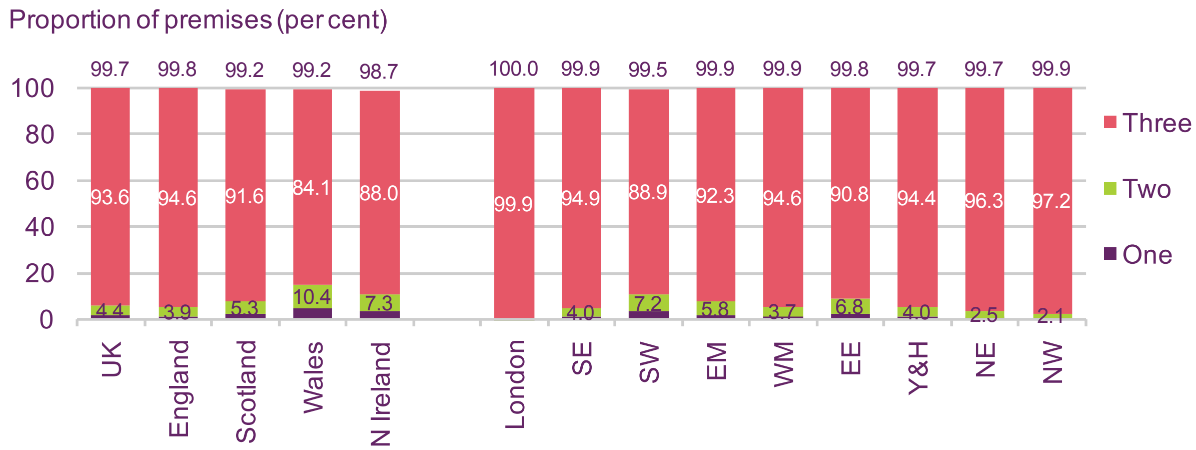
3G coverage is less prevalent, with 77.3% of UK premises having coverage from all operators (including Three) outside the building. Just under 1% of premises have no 3G coverage from any operator.

These figures all refer to outdoor coverage. Coverage figure for indoor reception are likely to be lower because radio signals are attenuated as they pass through the fabric of buildings. Indoor reception is highly dependent on the building in which reception is desired and where the user is located in the building. This makes it difficult to calculate indoor coverage figures.

Eighty-eight per cent of Northern Ireland's premises have mobile coverage from all three 2G operators, this is nearly six percentage points lower than the UK average. Northern Ireland's 3G coverage is also lower than the UK average, at 55.9% premises coverage for all 3G operators. And at 11.7%, Northern Ireland fares worst of all four nations in terms of the percentage of premises that have no 3G coverage from any operator.

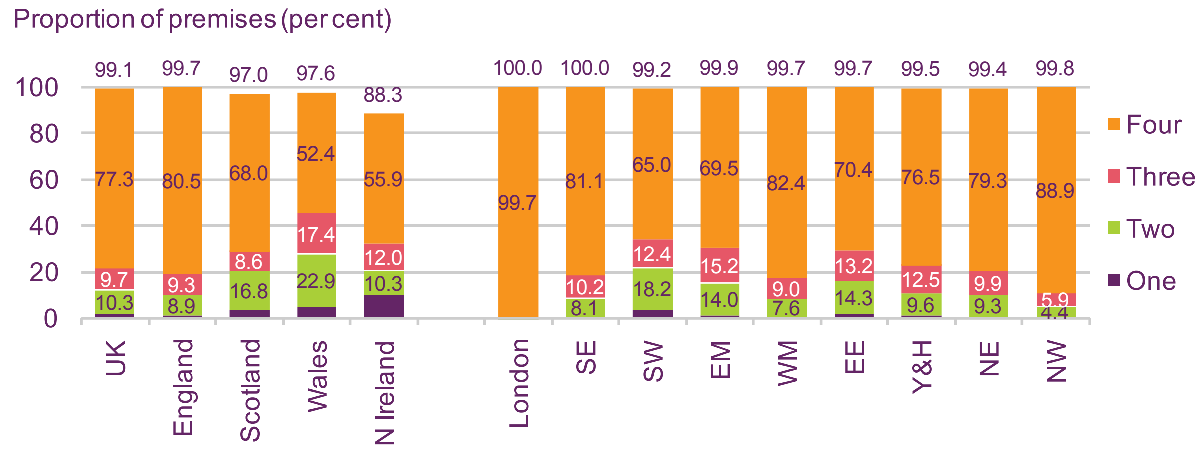
Expressed in terms of geographical area, coverage figures are usually much lower, because mobile masts are more commonly installed near centres of population. Eight and a half per cent of the area of Northern Ireland has no 2G mobile coverage from any operator, compared to 12.8% of the UK. 3G coverage is lower, with 52.1% of the area of Northern Ireland having 3G coverage from any operator compared to 75.8% across the UK as a whole.

Figure 5.5 2G premises mobile coverage, by number of operators



Source: Ofcom, based on operator data. Coverage is based on 200m square pixels covering the UK using an enhanced methodology. Therefore data are not comparable to those published in the 2011 Communications Market Report.

Figure 5.6 3G premises mobile coverage, by number of operators



Source: Ofcom, based on operator data. Coverage is based on 200m square pixels covering the UK using an enhanced methodology. Therefore data are not comparable to those published in the 2011 Communications Market Report.

5.4 Service take-up

Significant rise in smartphone ownership in Northern Ireland

Take-up of fixed telephony dropped by four percentage points to 80% in Northern Ireland in the year to Q1 2012, when it was four percentage points lower than the UK average of 84% (Figure 5.7).

However, personal ownership of mobile telephony in Northern Ireland was among the highest in the UK at 93% in Q1 2012. Furthermore, 34% of all adults in Northern Ireland owned a smartphone handset (equivalent to 37% of mobile phone users), and although this was below the UK average of 39% of adults, it represented a significant increase from the previous year's figure of 21%.

Figure 5.7 Take-up of communications services, 2012

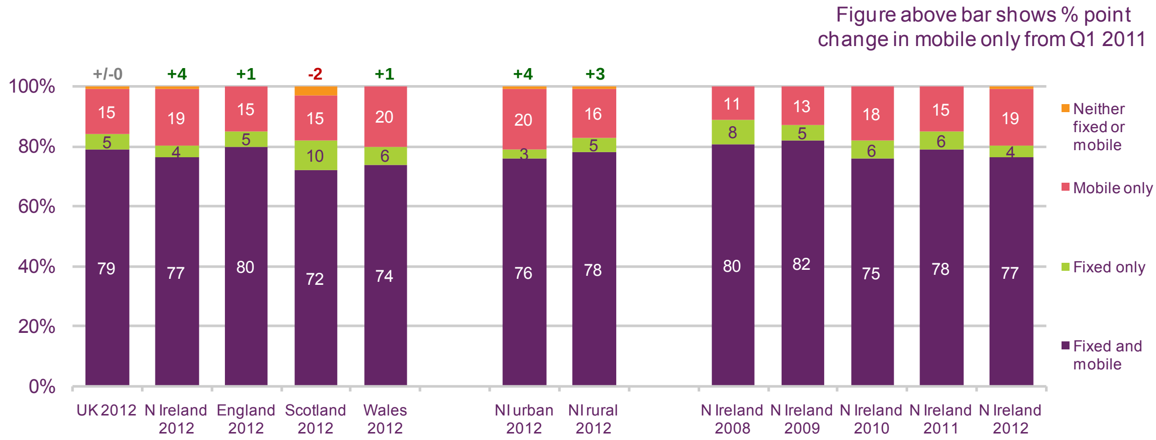
		UK	N Ireland	England	Scotland	Wales	NI urban	NI rural
Individual								
Voice telephony	Fixed Line	**84%**	80%	85%	82%	80%	79%	83%
	Mobile	**92%**	93%	93%	85%	92%	94%	92%
	Smartphone	**39%**	34%	40%	32%	39%	38%	34%
Internet	Computer (any type)	**79%**	73%	80%	70%	71%	72%	74%
	Tablet computer	**11%**	9%	11%	11%	8%	11%	6%
	Total Internet	**80%**	73%	81%	71%	74%	73%	74%
	Broadband (fixed and mobile)	**76%**	69%	78%	68%	68%	69%	69%
	Fixed Broadband	**72%**	66%	73%	64%	63%	65%	66%
	Mobile Broadband	**13%**	7%	13%	12%	16%	7%	8%

Source: Ofcom research, Quarter 1 2012
Base: All adults aged 16+ (n = 3772 UK, 508 Northern Ireland, 2251 England, 500 Scotland, 513 Wales, 255 Northern Ireland urban, 253 Northern Ireland rural)

Nineteen per cent of homes in Northern Ireland were mobile-only in Q1 2012

Similar to the UK as a whole, nearly eight in ten households in Northern Ireland (77%) used both fixed and mobile telephony in Q1 2012, while 19% used only mobile telephony, one of the highest proportions among the UK nations (Figure 5.8). The proportion of homes that were mobile-only increased by four percentage points in the year to Q1 2012, although this change falls within the survey's error margins.

Figure 5.8 Cross-ownership of household telephony services



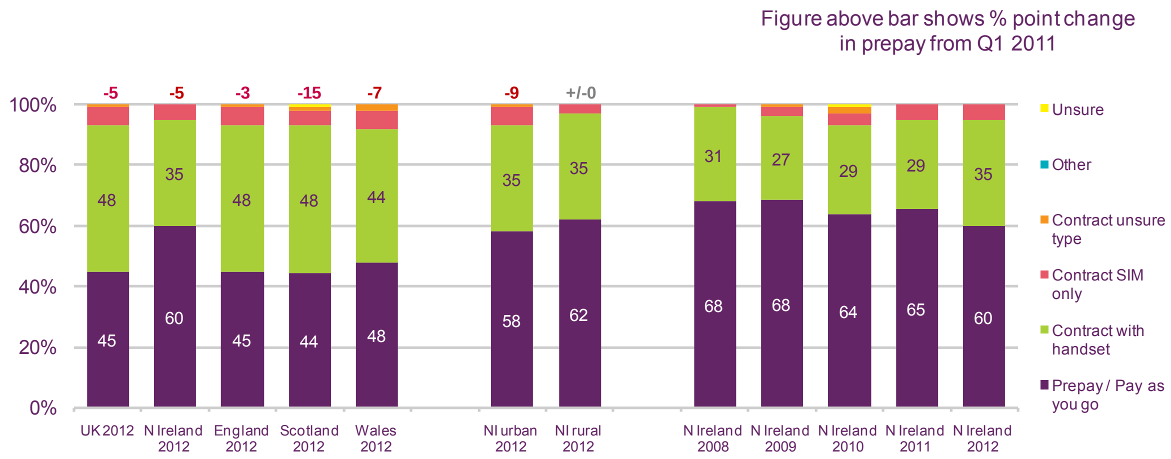
Source: Ofcom research, Quarter 1 2012
Base: All adults aged 16+ (n = 3772 UK, 508 Northern Ireland, 2251 England, 500 Scotland, 513 Wales, 255 Northern Ireland urban, 253 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012)
QC1. Is there a landline phone in your home that can be used to make and receive calls?/ QD1. How many mobile phones in total do you and members of your household use?

Use of pre-pay mobile services was higher than average in Northern Ireland in Q1 2012

Six in ten mobile users in Northern Ireland had a pre-pay (or 'pay-as-you-go') package rather than a contract (or 'pay-monthly') subscription in Q1 2012, significantly higher than the 45% average across the UK as a whole (Figure 5.9). Northern Ireland appears to be following the trend in the UK as a whole (with mobile users moving from pre-pay to contract tariffs), and the proportion of mobile connections that were pre-pay fell by five percentage points in the year to Q1 2012.

Another characteristic of the Northern Ireland mobile market is the high share of O2 customers, with 68% of mobile users claiming to use the O2 network most often – significantly higher than the 26% UK average.

Figure 5.9 Type of mobile subscription



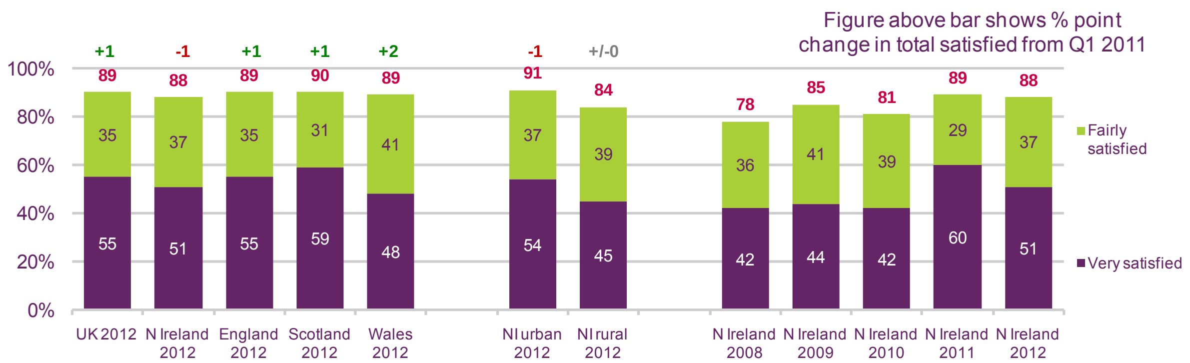
Source: Ofcom research, Quarter 1 2012
Base: Adults aged 16+ who personally use a mobile phone (n = 3392 UK, 463 Northern Ireland, 2043 England, 430 Scotland, 456 Wales, 236 Northern Ireland urban, 227 Northern Ireland rural, 744 Northern Ireland 2008, 877 Northern Ireland 2009, 1237 Northern Ireland 2010, 425 Northern Ireland 2011, 463 Northern Ireland 2012)

5.5 Satisfaction

Nearly nine in ten mobile users in Northern Ireland were satisfied with their mobile service in Q1 2012

Overall satisfaction with mobile phone services remained stable in Northern Ireland in the year to Q1 2012, with 88% of mobile consumers saying that they were 'very' or 'fairly' satisfied with their service, in line with the UK average of 89%. (Figure 5.10). Satisfaction was slightly higher in urban (91%) than rural (84%) areas, probably due to better reception in urban centres.

Figure 5.10 Satisfaction with reception of mobile phone service



Source: Ofcom research, Quarter 1 2012
Base: Adults aged 16+ who personally use a mobile phone (n = 3392 UK, 463 Northern Ireland, 2043 England, 430 Scotland, 456 Wales, 236 Northern Ireland urban, 227 Northern Ireland rural, 527 Northern Ireland 2008, 587 Northern Ireland 2009, 658 Northern Ireland 2010, 464 Northern Ireland 2011, 463 Northern Ireland 2012)
QD21c. Thinking about your mobile phone service only, how satisfied are you with (main supplier) for reception/ accessing network?
Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with their mobile reception

Eighty-five per cent of fixed broadband users in Northern Ireland were satisfied with their service in Q1 2012

Overall satisfaction with fixed broadband services remained relatively stable at 85% in Northern Ireland in the year to Q1 2012 (Figure 5.11). However, there was a six percentage point (pp) fall in satisfaction with the speed of fixed broadband services over the same period, driven by a nine pp decease in satisfaction in urban areas. As with the rest of the UK, most broadband users in Northern Ireland (67%) were unaware of the advertised speed of their connection, and nearly three-quarters were unaware of their actual speed (73%).

Figure 5.11 Satisfaction with fixed broadband service

Source: Ofcom research, Quarter 1 2011
Base: Adults aged 16+ with a fixed broadband connection at home (n = 2556 UK, 331 Northern Ireland, 1577 England, 330 Scotland, 318 Wales, 166 Northern Ireland urban, 165 Northern Ireland rural, 319 Northern Ireland 2008, 388 Northern Ireland 2009, 469 Northern Ireland 2010, 335 Northern Ireland 2011, 331 Northern Ireland 2012)
QE8b. Thinking about your fixed broadband internet service, how satisfied are you with your main supplier for the overall service provided by (main supplier)/ for the speed of your service while online (not just the connection)?
Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with their speed of service while online

6 Post

6.1 Introduction

On 1 October 2011, Ofcom took over regulation of the UK's postal services from the previous regulator Postcomm. Ofcom is responsible for safeguarding the UK's Universal Service Obligation on postal services[13].

This section of the report summarises the results of a face-to-face survey of UK residential consumers conducted in December 2011. In total 3615 UK adults with responsibility for their household's post were interviewed, including 95 in Northern Ireland[14].

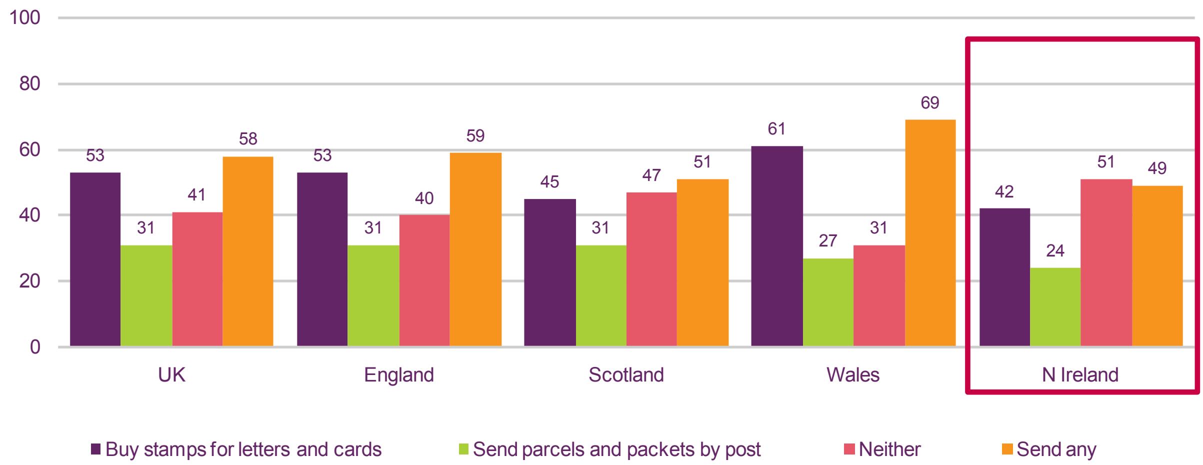
Ofcom is currently conducting further research among users of the postal service in Northern Ireland, using a larger sample of residential users including those in remote rural locations, as well as business users of postal services,.

6.2 Sending and receiving post in Northern Ireland

Consumers in Northern Ireland claim to send less post regularly than in other nations.

Fewer consumers in Northern Ireland (49%) claim to send items of post 'regularly' than the UK average (58%). As might be expected, fewer consumers in Northern Ireland (42%) claim to 'regularly' buy stamps for letters and cards than the UK average (53%). The number of consumers claiming to 'regularly' send parcels and packets (24%) is also lower than in other nations, and lower than the UK average of 31%. (Figure 6.1) But the term 'regularly' is self-defined in this question, while Figure 6.2 shows the actual numbers of letter/cards claimed to be sent, which is similar to the UK average.

Figure 6.1 Regular use of postage stamps and postage services by nation



Source: Ofcom Attitudes toward spending research, 2012
Base: All adults aged 16+ (n=2124 UK, 1726 England, 182 Scotland, 99 Wales, 117 Northern Ireland)
Q: Do you or anyone in your household regularly do any of the following...

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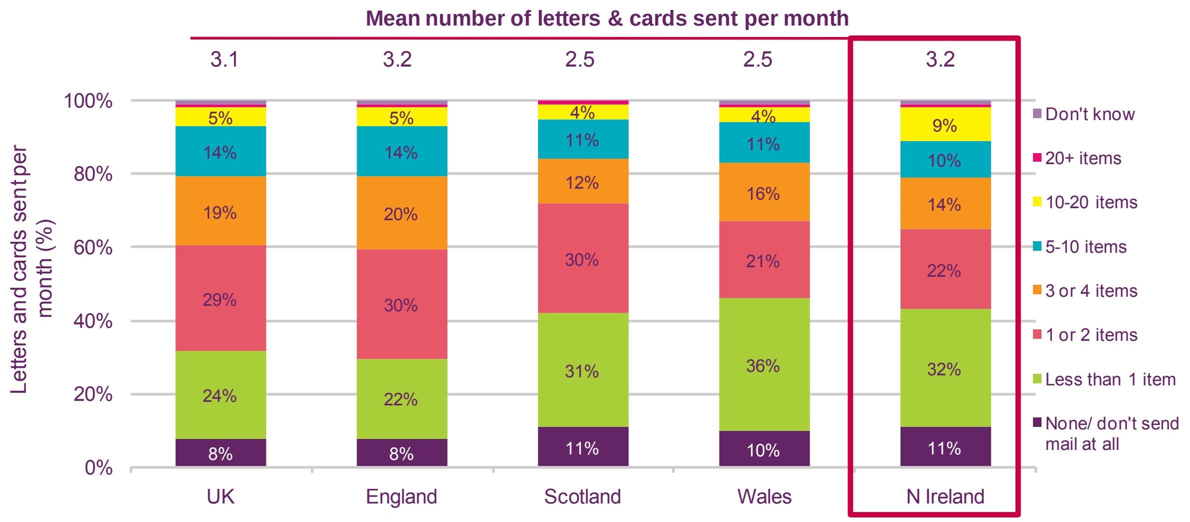
[13] More information about Ofcom's regulation of postal services in the UK can be found here: http://stakeholders.ofcom.org.uk/post/

[14] The base size for consumers in Northern Ireland is relatively small, therefore caution should be used when interpreting and applying the results

People in Northern Ireland receive more post than they send

Adults claim to send an average of 3.2 letters or cards in an average month (Figure 6.2), compared to an average of approximately 6.4 letters and cards received per *week* (Figure 6.3). This difference is explained by the fact that the majority of UK mail is sent by businesses to households.

Figure 6.2 Approximate number of letters and cards sent per month – personal mail

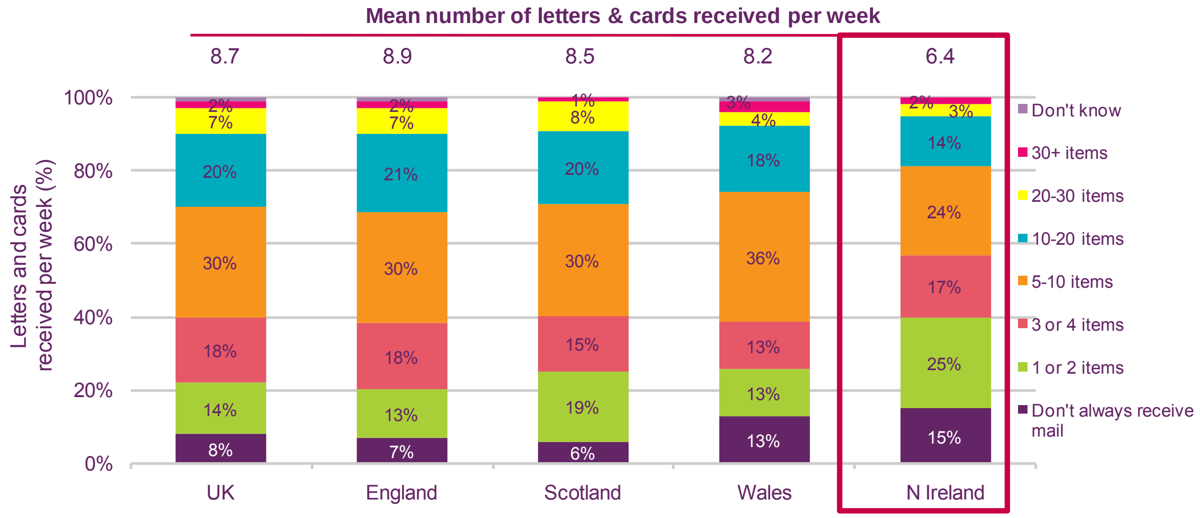


Source: Ofcom omnibus research, December 2011
Base: All adults aged 16+ with responsibility for post (n = 3615 UK, 3115 England, 232 Scotland, 173 Wales, 95 Northern Ireland)
Q. Approximately how many letters and cards, do you personally send in an average month? This should exclude any items you send from home in connection with running a business, if you do this from home. We will ask about parcels separately

Adults in Northern Ireland receive fewer letters and cards than adults in the other nations

The volume of letters and cards sent by adults in Northern Ireland is similar to the UK average of 3.1 items sent per month. (Figure 6.2) The number of letters and cards received per week appears to be lower that the UK average of 8.7 per week, as adults in Northern Ireland in our survey claimed to receive fewer items. This difference is statistically significant; although the extent of the difference might be explained by survey error margins. Research undertaken by Royal Mail has also found that households in Northern Ireland receive fewer items on average than those living in the UK as a whole. Later this year Ofcom will be conducting research among a much larger sample of adults in Northern Ireland, which will enable us to examine this difference with greater confidence.

Figure 6.3 Approximate number of letters and cards received per week

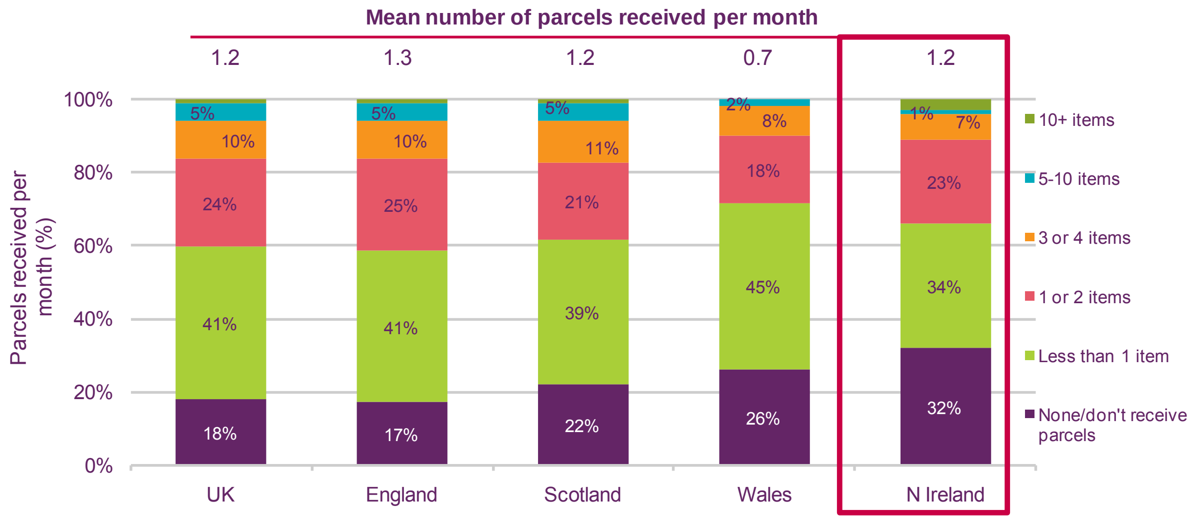


Source: Ofcom omnibus research, December 2011
Base: All adults aged 16+ with responsibility for post (n = 3615 UK, 3115 England, 232 Scotland, 173 Wales, 95 Northern Ireland)
Q. Approximately how many letters or cards do you receive in an average week? Please don't include parcels, we will ask you about these separately.

Consumers in Northern Ireland receive an average of 1.2 parcels per month

Across the UK, in recent years, the volume of parcels delivered to households has been increasing as consumers have ordered more items online for delivery to their homes. In Northern Ireland, adults claim to receive, on average, 1.2 parcels per month. However, the number of packages received varies considerably, with a substantial minority (11%) receiving three or more parcels per month (Figure 6.4). The data suggest that adults in Northern Ireland receive a similar number of parcels to the UK average.

Figure 6.4 Approximate number of parcels received per month – personal mail



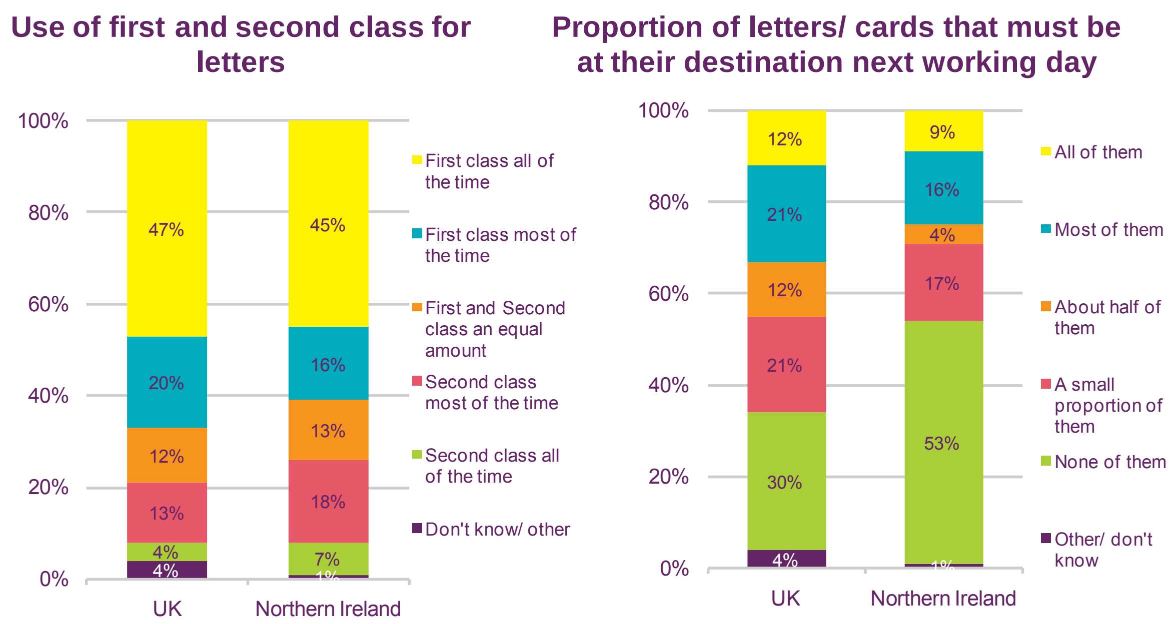
Source: Ofcom omnibus research, December 2011
Base: All adults aged 16+ with responsibility for post (n = 3615 UK, 3115 England, 232 Scotland, 173 Wales, 95 Northern Ireland)
Q. Approximately how many parcels do you receive in an average month?

6.3 Use of stamps in Northern Ireland

More than four in ten people in Northern Ireland always use First Class stamps to send post

Six in ten (61%) post users in Northern Ireland said that they use First Class stamps more than Second Class stamps and 45% said that they use First Class all the time. This is despite the fact that only a minority say their mail has to arrive the next day, with 9% saying that all of their mail needs to arrive next day, and 16% saying that most of it does. Whereas three in ten (30%) of consumers in the UK overall said that none their mail needed to arrive the next working day, around half (53%) of consumers in Northern Ireland said this was the case.

Figure 6.5 Use of First and Second class post



Source: Ofcom omnibus research, December 2011
Base: All adults aged 16+ with responsibility for post in Northern Ireland (n = 95)
Q. When sending letters/ cards which do you use? And what proportion of these letters/ cards have to be at their destination the next working day?

6.4 Attitudes towards the postal service in Northern Ireland

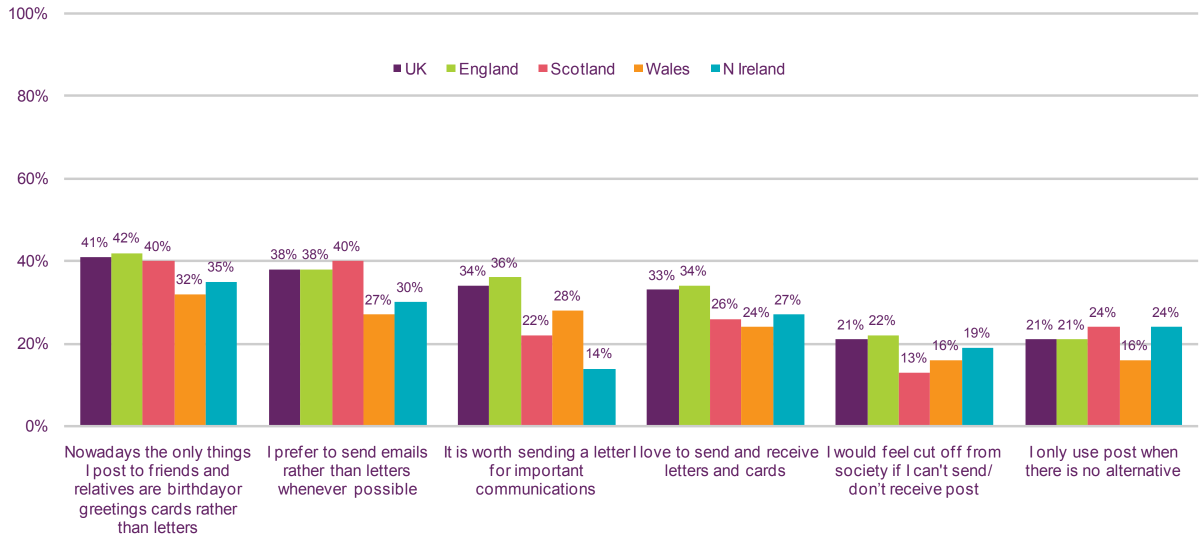
Adults in Northern Ireland are less likely to say that it is worth using post for important communications

Fourteen per cent of adults in Northern Ireland agree that it is worth using post for important communications, the lowest across all UK nations and significantly lower than the UK average (34%).

Three in ten (30%) adults in Northern Ireland agree that they prefer to send emails rather than letters whenever possible, which is a lower proportion than agree with this across the UK (38%). A quarter (24%) of adults in Northern Ireland say that they use post only when there is no alternative, compared to the UK average of 21% (Figure 6.6) – this is the joint highest level of agreement with this statement across the UK.

Adults in Northern Ireland are less likely to agree that they love to send and receive letters and cards (27% compared to the UK average of 33%). One in five (19%) agree that they would feel cut off from society if they could not send or receive post.

Figure 6.6 Agreement with statements about post



Source: Ofcom omnibus research, December 2011
Base: All adults aged 16+ with responsibility for post (n = 3615 UK, 3115 England, 232 Scotland, 173 Wales, 95 Northern Ireland)
Q. Which of these statements applies to you?