



Communications Market Report: Northern Ireland

Research Document

Publication date: 6 August 2015

About this document

The report contains statistics and analysis of the Northern Ireland communications sector and is a reference for industry, stakeholders and consumers. It also provides context to the work Ofcom undertakes in furthering the interests of consumers and citizens in the markets we regulate.

The report contains data and analysis on broadcast television and radio, fixed and mobile telephony, internet take-up and consumption and post.

We publish this report to support Ofcom's regulatory goal to research markets constantly and to remain at the forefront of technological understanding. It also fulfils the requirements on Ofcom under Section 358 of the Communications Act 2003 to publish an annual factual and statistical report. It also addresses the requirement to undertake and make public our consumer research (as set out in Sections 14 and 15 of the same Act).

Introduction

Welcome to Ofcom's annual Communications Market Report for Northern Ireland. The report gives an overview of the region's communications markets, examining availability, take-up and consumption of the internet, telecommunications, broadcasting and postal services, and comparing the findings with the other nations and the UK as a whole.

The internet is playing a growing and significant part in the everyday lives of people in Northern Ireland. This year's report shows another rise in smartphone and tablet ownership.

Significantly, more households (54%) now have tablets than don't, while for the first time smartphones have overtaken laptops as the most important device for accessing the internet.

The report also shows that, compared to a year ago, people are spending marginally less time watching TV, on average just under four hours a day, and considerably more time online, on average 21.6 hours a week. Indeed, this is now highest among the UK nations.

Despite the rise in online activity, traditional media remains popular. Our research shows that TV is still by far the most important source of news in Northern Ireland, followed by radio and newspapers.

And while people are watching marginally less TV, paid-for television services through the satellite, cable and other platforms is still high. More than 70% of households in Northern Ireland subscribe to a pay-TV service, higher than in every other UK nation.

Other notable findings from this year's report include high levels of satisfaction with broadband speeds. Fixed broadband users in Northern Ireland were more likely than the UK average to be satisfied with their broadband speeds (86% vs. 80%), with users in Northern Ireland more likely to say they were 'very' satisfied (54% vs. 43%).

Continuing the online theme, new research this year highlights how technology is influencing how people communicate. Some 57% of internet users in Northern Ireland say that these new communications methods have made life easier, with a minority (20%) saying they spend too much time online.

Facebook remains the most popular social networking website, with 65% of adults saying they have used the site, followed by WhatsApp (40%), and Twitter (33%), while nearly a quarter of adults (23%) admit to being 'hooked' on social media.

Meanwhile, a majority of adults express concerns about sharing personal information online and one in ten (13%) have posted things online they wish they hadn't.

The information set out in this report does not represent any proposal or conclusion by Ofcom in respect of the current or future definition of markets. Nor does it represent any proposal or conclusion about the assessment of significant market power for the purpose of the Communications Act 2003, the Competition Act 1998 or any other relevant legislation.

The full dataset and charts are available in a searchable resource, which can be found at <http://www.ofcom.org.uk/cmnrthernireland>. Companion reports for the UK and each of the nations can be found at www.ofcom.org.uk/cmr.

Contents

Introduction	1
Setting the scene	3
Key facts about Northern Ireland	3
1 Northern Ireland's communications market	4
1.1 Key findings for Northern Ireland	4
1.2 Social communication online	10
1.3 Social media	16
1.4 Changes in audio-visual consumption in Northern Ireland	20
2 Television and audio-visual content	27
2.1 Recent developments in Northern Ireland	27
2.2 Digital television take-up in Northern Ireland	28
2.3 Broadcast television content	32
2.4 TV programming for viewers in Northern Ireland	37
2.5 PSB television quota compliance	42
2.6 Viewing to Republic of Ireland channels	43
2.7 Other programming in Northern Ireland	44
3 Radio and audio content	49
3.1 Recent developments in Northern Ireland	49
3.2 Radio station availability	50
3.3 DAB coverage	50
3.4 Patterns of listening to audio content	51
3.5 Digital radio set ownership and listening	53
3.6 The radio industry	55
4 Telecoms and networks	57
4.1 Recent developments in Northern Ireland	57
4.2 Availability of fixed broadband services	58
4.3 Mobile network coverage	63
4.4 Service take-up	66
4.5 Satisfaction with telecoms services	71
5 Internet and web-based content	73
5.1 Internet take-up	73
5.2 Internet-enabled devices	74
5.3 Internet use	76
6 Post	79
6.1 Recent developments in Northern Ireland	79
6.2 Sending post: residential customers	79
6.3 Receiving post: residential customers	81
6.4 Sending post to / receiving post from the Republic of Ireland	82
6.5 Attitudes towards Royal Mail	83
6.6 Sending and receiving post – business customers	83

Setting the scene

Key facts about Northern Ireland

Figure	Northern Ireland	UK
Population	1.830 million (mid-2013 estimate)	64.106 million (mid-2013 estimate)
Age profile	Population aged <16: 20.9% Population aged 65+: 15.3%	Population aged <16: 20.0% Population aged 65+: 17.4%
Population density	134 people per square kilometre	263 people per square kilometre
Language	11% have some ability in Irish; 8.1% have some ability in Ulster-Scots	n/a
Unemployment	6.2% of economically active population, aged 16 and over	5.5% of economically active population, aged 16 and over
Income and expenditure	Weekly household income: £610 Weekly household expenditure: £485	Weekly household income: £711 Weekly household expenditure: £497

Source: Office for National Statistics: *Population Estimates for UK, England and Wales, Scotland and Northern Ireland, Mid-2013*; Office for National Statistics: *Regional Labour Market, May 2015*; Office for National Statistics: *Family Spending 2014 edition*; Northern Ireland Statistics and Research Agency, *Census 2011 - Key Statistics for Northern Ireland*

A note on our survey research

We conducted a face-to-face survey of 3,756 respondents aged 16+ in the UK, with 504 interviews conducted in Northern Ireland. Quotas were set and weighting applied to ensure that the sample was representative of the population of Northern Ireland in terms of age, gender, socio-economic group and geographic location. Fieldwork took place in January and February 2015.

Respondents were defined as urban if they lived in a settlement with a population of 2000 or more and rural if they lived in areas with smaller populations. The survey sample in Northern Ireland has error margins of approximately +/- 3-5% at the 95% confidence level. In urban and rural areas; survey error margins are approximately +/- 4-7%.

In addition to the survey data, this report refers to information from a range of other sources, including data provided to Ofcom by stakeholders. Tables summarising the data collected in our survey are published on Ofcom's website.

1 Northern Ireland's communications market

1.1 Key findings for Northern Ireland

Introduction

This section sets out a selection of the key facts and figures relating to communications markets across Northern Ireland in 2014¹, comparing and contrasting nations and highlighting changes that have taken place in the past year.

Key findings for Northern Ireland

Changes in audio-visual consumption in Northern Ireland

- **On average, people in Northern Ireland watched 15 minutes less broadcast TV per day in 2014, at 3 hours 47 minutes.** This was the largest decline across the nations, compared to a fall of 12 minutes per day in Wales, 9 minutes per day in England², 7 minutes in Scotland and 11 minutes across the UK (network) as a whole.
- **Ofcom's consumer research found fewer people claiming they were watching traditional TV (i.e. at the time of broadcast) compared to the previous year in Northern Ireland.** Eight per cent of respondents said they were doing this more, while 33% said they were doing it less, resulting in a net change of -25%.
- **The research also identified increases in non-traditional TV viewing among Northern Ireland respondents.** Net gains were +39% watching using non-subscription catch-up (e.g. iPlayer), +32% watching content they had personally recorded and +22% using subscription on-demand services (e.g. Netflix).
- **In Northern Ireland, respondents were more likely to say they were watching fewer programmes on public service broadcasting (PSB) channels.** Six per cent said they watching more PSB in April 2015 compared to the previous year, while 34% said they were watching less; a net change of -28%. This level of decline was not reported in the other nations or in the UK overall.
- **Just under a third (32%) of adults in Northern Ireland said they had used catch-up services in 2015, a decrease of 7 percentage points since the same time in 2014.** Catch-up usage in Northern Ireland is lower than in Scotland (49%), Wales (48%) and the UK as a whole (48%). Use of both standalone video subscription services (14%) and PVRs (60%) is to the same as the UK average (15% and 62% respectively).

Social communication online and social networking

- **Two-thirds of internet users in Northern Ireland agree that technology has changed the way they communicate, and three-fifths say these new**

¹ The Ofcom *Technology Tracker* also includes data from Q1 2015.

² The figure for England reflects the average across the English regions with the largest decline in the North East (-17 minutes) and the smallest decline in Border (-2 minutes).

communications methods have made life easier. However, these new communication methods also bring some downsides. Half of all online adults in Northern Ireland (51%) agree that being online interrupts face-to-face conversations with friends and family, and a fifth (21%) agree that they spend too much time online compared with spending actual time with friends and family.

- **People use a mix of communication methods, both new and old, to make contact with family and friends.** Text messages and email are common weekly choices, but the more traditional methods of meeting face-to-face and talking on the phone are still integral to the mix. Text messaging (78%), meeting face-to-face (71%) and email communications (67%) are the top three most common methods of contact on a weekly basis. Voice calls are also used by half (52%) of all online adults in Northern Ireland, and newer online communications services such as social media (55%) and instant messaging (57%) are also common methods of weekly communication.
- **One in five adults say they are ‘hooked’ on social media.** Overall, over one in five adults (23%) in Northern Ireland indicated a rating of between 7 and 10 on a 10-point scale (where 1 equated to ‘I’m not at all hooked on social media’ up to 10, ‘I’m completely hooked on social media’).
- **In terms of reach, Facebook and YouTube are the most extensively used social media sites in Northern Ireland.** Facebook’s reach (65%) is significantly lower than in the other nations and is equal to that of YouTube (65%). WhatsApp (40%) and Twitter (33%) are also used by a significant minority.

TV and audio-visual content

- **Total spend on current affairs programming for people in Northern Ireland has increased in nominal terms year on year.** Including acquisitions and repeats, the BBC and UTV spend on current affairs programming for viewers in Northern Ireland increased by 28% in nominal terms in 2014, a 43% rise on five years earlier.
- **Northern Ireland’s share of total spend on original network productions remained steady in 2014.** Share of total spend increased marginally, to 1.2% from 1.1% in 2013. While Northern Ireland remains the nation with the lowest spend, the proportion of overall spend in the nation has tripled from 0.4% in 2010.
- **Smart TV take-up in Northern Ireland remains lower than the UK average.** Take-up of smart TV sets has increased significantly since 2014, both in Northern Ireland (up 8pp) and in the UK as a whole (up 9pp). Take-up in Northern Ireland remains lower than the UK level, however (15% vs. 21%). Take-up of ‘HD-ready’ TV sets remains unchanged year on year, and is also below the UK level (67% vs. 73%).
- **Adults in Northern Ireland are less likely to use a website or app as their main source of news.** In 2014, 9% of adults aged 16+ cited websites or apps as their main source of UK and world news, significantly lower than respondents in other UK nations and lower than the UK as a whole (15%). Television was the most popular main source (56%).

Radio and audio content

- **The time spent listening to radio in Northern Ireland is higher than in the UK as a whole.** Radio services reached 88.9% of adults in Northern Ireland, lower than the

UK average of 89.5%, but the average time spent listening each week was 21.6 hours, slightly higher than the UK average of 21.4 hours.

- **Analogue listening still accounts for seven in ten listening hours in Northern Ireland.** This is a year-on-year increase of 2.1 percentage points, but remains lower than the UK average (37%).
- **Local commercial radio is the most listened-to type of radio in Northern Ireland.** Local commercial and BBC local and nations' services together accounted for 55% of total listening hours in 2014. The majority of this listening was to local commercial stations, with a 35% share of total listening hours.
- **Revenue from local commercial radio grew faster in Northern Ireland than in any other nation.** Local commercial radio revenue per head of population in Northern Ireland was £7.11 in 2014 - a 29p increase since 2013. This growth was driven by a 10% increase in local advertising revenue.
- **Northern Ireland now has its own local DAB-only service.** Downtown Country started broadcasting in Northern Ireland in April 2015. The spin-off station is the region's first digital-only station, broadcasting on DAB and online.

Telecoms and networks

- **Ninety-five per cent of premises in Northern Ireland were able to receive NGA broadband services in May 2015.** This was the highest proportion among the UK nations and was unchanged from June 2014.
- **Outdoor 4G mobile coverage was available to 91.1% of premises in Northern Ireland in May 2015.** This was the second highest proportion among the UK nations.
- **Broadband take-up in Northern Ireland was below the UK average in Q1 2015.** Across the UK as a whole, 80% of homes had a broadband connection of some description, compared to 72% in Northern Ireland.
- **Northern Ireland had the highest proportion of mobile phone users who most often used a pre-pay service in Q1 2015, at 43%.** This was 10 percentage points higher than the UK average of 33%.

Internet and web-based content

- **As in the UK as a whole, take-up of tablets in Northern Ireland has increased.** By 2015 over half (54%) of households in Northern Ireland had a tablet; the same proportion as the UK (54%).
- **Personal ownership of smartphones grew between 2014 and 2015,** standing at 63% in 2015, in line with the UK as a whole (66%).
- **Internet users in Northern Ireland said they spent significantly more time online in 2014 than they did in the previous year;** up from 13.8 to 21.6 hours in a typical week

Post

- **One in three residents in Northern Ireland did not send any items through the post in the past month.** Adults in Northern Ireland claim to send 4.5 items of post per month on average, the lowest across the UK nations.
- **Half of all adults in Northern Ireland think the cost of sending a letter to the Republic of Ireland is poor value for money.** When asked to consider the cost of posting a standard letter to the Republic of Ireland, half of all adults in Northern Ireland perceived this to offer poor value for money, with almost three in ten saying that it was 'very poor' value for money.
- **Businesses in Northern Ireland are the most likely to use Second Class services for their standard and franked post.** Six in ten (61%) respondents used standard Second Class stamps. This is in contrast to the rest of the UK, where standard First Class stamps are more likely to be used.

Figure 1.1 Fast facts for Northern Ireland

Nations' Fast Facts: wave 1 2015 (%)– unless otherwise stated, figures relate to household take-up

	UK	England	Scotland	Wales	Northern Ireland	UK urban	UK rural	NI urban	NI rural
Digital TV take-up	97	97	96	98	97	96 ⁻	98 ⁺	97	97
Pay-digital TV	59	58	58 -10	67 ¹ +10	63	59 ⁺	55 ⁻	66	60
Freeview-only TV	30	30 -3	35 ² +10	24 ⁻ -9	28	30 ⁻	35 ⁺	26	32
Smart TV take-up (among TV homes)	21 +9	21 +9	19 +11	17 +8	15 ⁻ +8	20 +8	23 +12	14 +8	16 +8
HDTV service (among those with an HDTV)	75 +5	75 +5	75	69 ⁻	75	74 ⁻ +4	81 ⁺	77	73
DAB ownership (among radio listeners) ³	43	44	37	47	29 ⁻	42 ⁻	50 ⁺	29	28
Catch-up TV/ film viewing online/ on-demand (via any device, among those who use the internet)	56 +5	56 +5	62	57	42 ⁻	56 +4	56 +10	41	44 -12
Total internet access at home (via any device)	85 +3	86 +4	78 ⁻	86 +6	79 ⁻	85 +3	85	81	76
Broadband take-up at home (fixed or broadband)	80 +3	81 +4	73 ⁻	78 +7	72 ⁻	79 +3	82	72	74
Use mobile to access internet	61 +4	62 +5	59	59	60 +9	62 ⁺ +4	55 ⁻	62 +9	56
Mobile phone take-up (personal use)	93	93	91	90	91	92	93	91	91
Smartphone take-up (personal use)	66 +5	67 +6	63	63	63 +8	67 ⁺ +5	59 ⁻	67 ⁺ +10	57 ⁻
4G service take-up (among smartphone owners)	45 +26	45 +26	55 ⁺ +25	36 ⁻ +16	40 +25	46 ⁺ +26	35 ⁻ +16	41 +24	37 +27
Fixed landline take-up	84	85	82	83	84	84 ⁻	90 ⁺	84	85
Desktop PC take-up	34	37	22 ⁻	26 ⁻	28 ⁻	34	35	30 ⁺	22 ⁻ -12
Laptop take-up	65	66	55 ⁻	65 +8	55 ⁻	64	67	54	55
Tablet computer take-up	54 +10	54 +10	52 +10	60 ⁺ +15	54 +9	54 +11	55 +8	57 +17	48
E-reader take-up (personal use)	20 +3	20 +3	14 ⁻	19	15 ⁻	19 +3	22	18 ⁺	9 ⁻ -13
Households taking bundles	63	64	61	67 +8	61 +7	63	67	60	64 +9

Key: ⁺ Figure is significantly higher for nation than UK average or significantly higher for nation's urban/ rural than for nation's rural/ urban; ⁻ Figure is significantly lower for nation than UK average or significantly lower for nation's urban/ rural than for nation's rural/ urban; ^{+xx} Figures have risen significantly by xx percentage points since W1 2014; ^{+xx} Figures have decreased significantly by xx percentage points since W1 2014;

	UK	England	Scotland	Wales	Northern Ireland
Fixed telephony availability	100	100	100	100	100
Fixed broadband availability ⁴	99.98	100	99.86	100	100
LLU ADSL broadband availability ⁵	95	96	89	93	89
Virgin Media cable broadband availability ⁶	44	47	36	21	27
BT Openreach / Kcom fibre broadband availability ⁷	82	82	75	83	92
NGA broadband availability ⁸	90	90	85	87	95
Superfast broadband availability	83	84	73	79	77
2G mobile availability ⁹	99.7	99.8	99.5	98.9	98.9
3G mobile availability ¹⁰	99.3	99.6	97.1	97.9	98.6
4G mobile availability ¹¹	89.5	92.1	79.7	62.8	91.1
DTT availability ¹²	98.5	98.6	98.7	97.8	97.4
TV consumption (minutes per day)	220	221 *	239	251	227
Radio consumption (minutes per day)	183	184	171	138	185

Source: Ofcom Technology Tracker W1 2015, BARB, RAJAR, industry data

Base: All adults aged 16+ (n = 3756 UK, 496 Wales, 2264 England, 492 Scotland, 504 Northern Ireland, 1974 England urban, 290 England rural, 246 Scotland urban, 246 Scotland rural, 249 Wales urban, 247 Wales rural, 249 Northern Ireland urban, 255 Northern Ireland rural)

1. This increase may be attributable to an anomalous decline in Wales cable TV as main television set in 2014 - In 2015 cable take-up in Wales increased by 6 pp to 10% over the previous year, returning it to 2013 levels. Market research surveys are subject to sample error and will occasionally report anomalous results.

2. In 2014 the survey data indicated a decline in use of Freeview as a main television service in Scotland. The 2015 measure is similar to the previous measure from 2013. This may suggest that the apparent decrease in 2014 could have been accounted for by sample error.

3. DAB ownership in the nations and UK as reported here is sourced from Ofcom research. The UK CMR uses RAJAR data for DAB ownership

4. Proportion of premises connected to an ADSL-enabled BT local exchange based on BT data, December 2014

5. Proportion of premises connected to an LLU-enabled BT local exchange based on BT data, December 2014

6. Proportion of premises able to receive Virgin Media cable broadband services, May 2015

7. Proportion of premises able to receive BT Openreach/ KCom fibre broadband services, May 2015; under regulatory rules other providers can provide retail fibre broadband services to consumers using these networks.

8. Proportion of premises able to receive NGA broadband services, May 2015

9. Proportion of premises with outdoor 2G mobile coverage from at least one operator, May 2015

10. Proportion of premises with outdoor 3G mobile coverage from at least one operator, May 2015

11. Proportion of premises with outdoor 4G mobile coverage from at least one operator, May 2015

12. Estimated proportion of homes that can receive the PSB channels via DTT (3PSB Mux coverage). Joint TV planning project (Arqiva, BBC, Ofcom).

* This figure reflects the average across the English regions with the highest in Border at 250 minutes (4 hours 10 minutes) and lowest in West at 197 minutes (3 hours 17 minutes) respectively.

1.2 Social communication online

Introduction

Ofcom conducted a survey among internet users to investigate how the internet, and being online and connected, has influenced the ways in which people maintain their existing relationships, and build new contacts and friendships³.

This section looks at Northern Ireland. It is worth noting that there are very few significant differences between Northern Ireland and the other nations, so the story is generally consistent with the other nations throughout⁴. All figures reported in the narrative relate to Northern Ireland unless stated otherwise.

Attitudes to online communications

Two-thirds of internet users in Northern Ireland agree that technology has changed the way they communicate

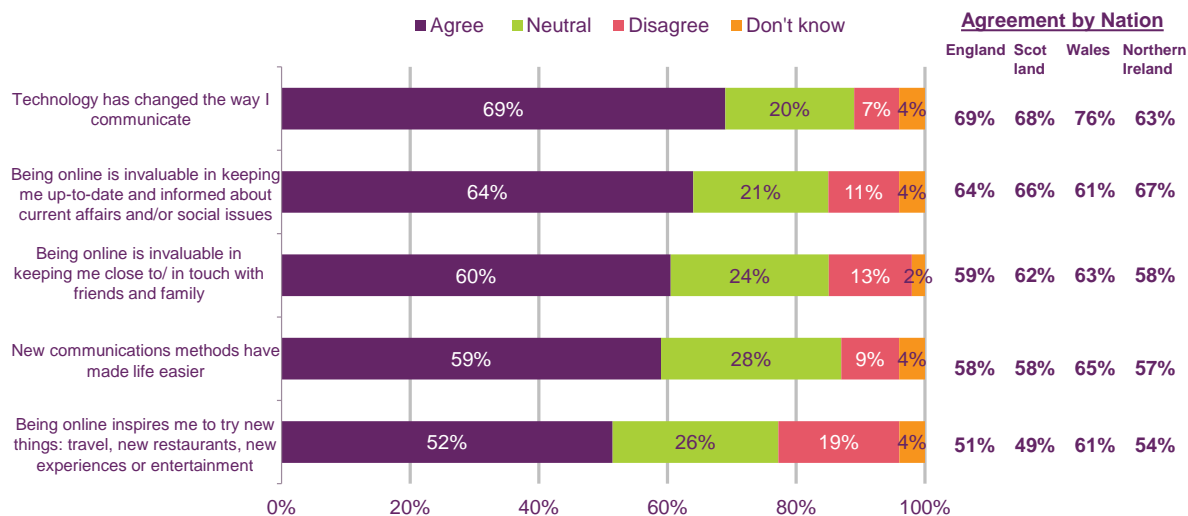
Two-thirds (63%) of internet users in Northern Ireland agree that '*technology has changed the way they communicate*' and three-fifths (57%) say that these new communication methods have '*made their life easier*'.

Digital communications are also seen to bring benefits. Around two-thirds (67%) of online adults in Northern Ireland agree that being online is '*invaluable for keeping them informed about current affairs and social issues*'. Over half agree that it helps them '*keep in touch with close family and friends*' (58%) and that it '*inspires them to try new things*' (54%).

³ The survey was conducted by YouGov in May 2015 among an online sample of 2,290 UK adults. The number of interviews achieved by nation are: England = 1879, Scotland = 200, Wales = 113 and Northern Ireland = 98.

⁴ Due to low base sizes, the confidence with which the population average can be estimated within nation is limited. This means that only large differences between nations (between 8% and 18%) can be reported as significantly different at 95% confidence. No differences between nations are significant when these margins of confidence are applied.

Figure 1.2 Level of agreement with positive statements about online communications, by nation



Source: Ofcom research, 'Connected Devices', May 2015

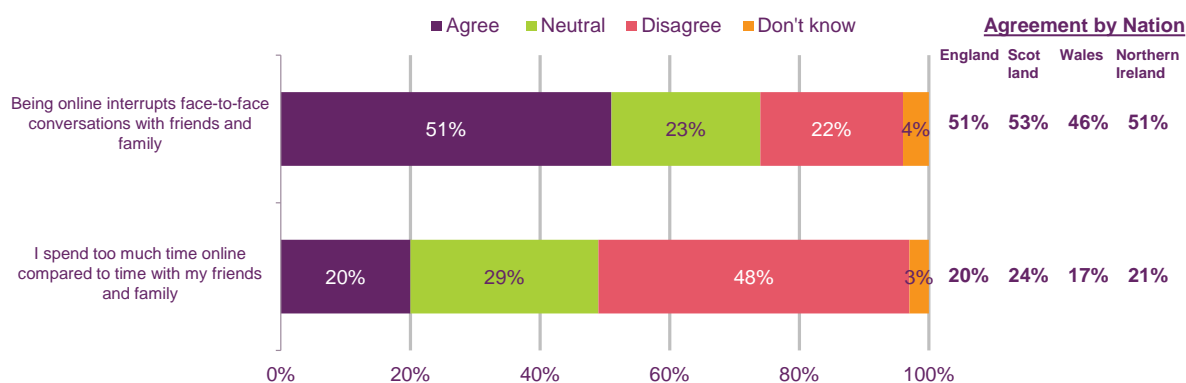
Base: All online adults aged 16+ (n=2290), England (n=1879), Scotland (n=200), Wales (n=113), Northern Ireland (n=98).

Q115. How much do you agree or disagree with the following statements?

A fifth (21%) of online adults in Northern Ireland think that they spend too much time online compared to time spent with friends and family

Despite the benefits seen in Figure 1.2, these new communication methods also bring some downsides. Half of all online adults in Northern Ireland (51%) agree that 'being online interrupts face-to-face conversations with friends and family' and one-fifth (21%) agree that they 'spend too much time online compared with spending actual time with friends and family'. There is no significant difference between the nations on these two statements.

Figure 1.3 Level of agreement with negative statements about online communications, by nation



Source: Ofcom research, 'Connected Devices', May 2015

Base: All online adults aged 16+ (n=2290), England (n=1879), Scotland (n=200), Wales (n=113), Northern Ireland (n=98).

Q115 How much do you agree or disagree with the following statements?

Communication methods

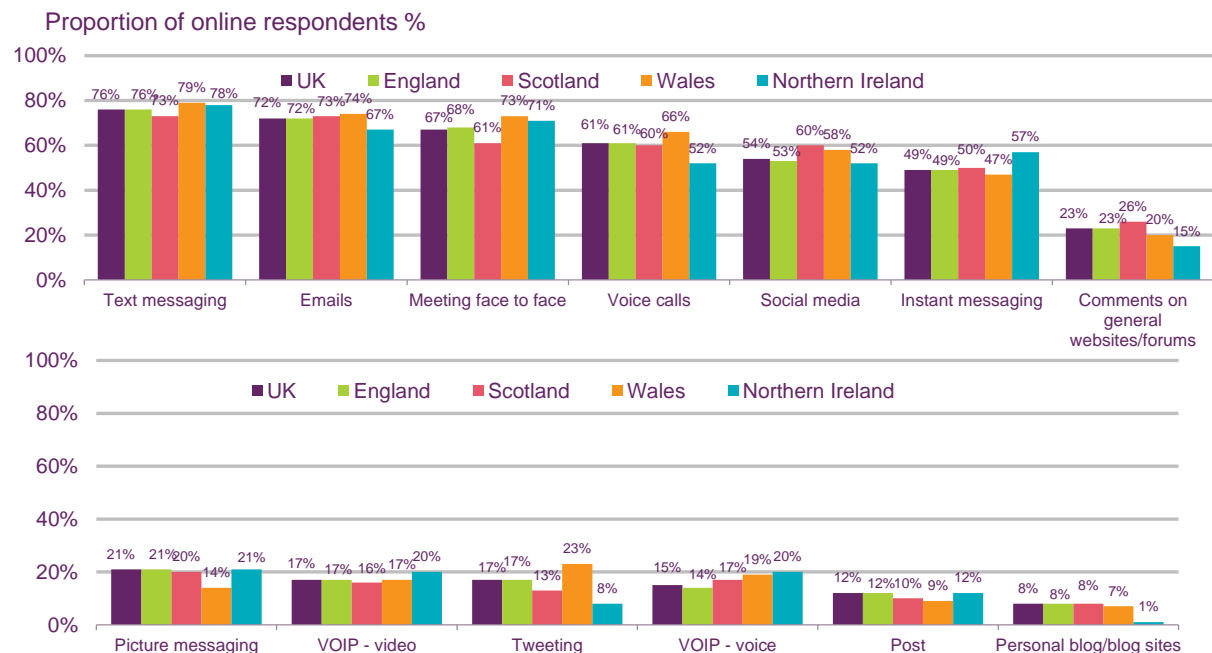
Text messaging is the most common weekly method of communication

Figure 1.4 shows that text messaging (78%), meeting face-to-face (71%) and email communications (67%) are the top three most common methods of contact on a weekly basis. Instant messaging (57%), voice calls (52%), and social media (52%) are also popular forms of communication.

Around one in five online users in Northern Ireland use picture messaging services (21%), make voice calls over the internet (19%), and video calls over the internet (20%) to communicate with friends and family.

Postal communications such as letters or cards are used weekly or more often by one in ten online adults (12%), increasing to a quarter (25%) when extending the time frame and considering usage once a month or more often.

Figure 1.4 Methods of communicating with friends and family: once a week or more often, by nation



Source: Ofcom research, 'Connected Devices', May 2015

Base: All online adults aged 16+ (n=2290), England (n=1879), Scotland (n=200), Wales (n=113), Northern Ireland (n=98).

Q50. Thinking about your personal communications in general, how often do you use the following to communicate with family and friends?

Communicating with close networks: friends and family

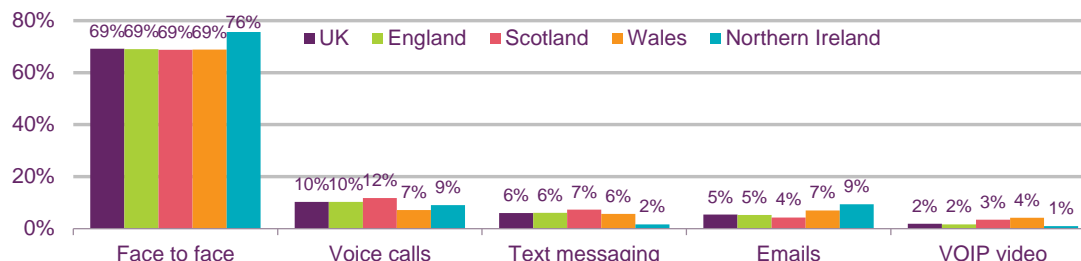
Over three-quarters of people in Northern Ireland prefer to communicate with family members in person

Figure 1.5 shows that the preferred methods of communication are the same for family and friends, with meeting people face-to-face being the dominant choice (76% for family and 69% for friends). This preference for face-to-face communication is consistent across all of the UK nations.

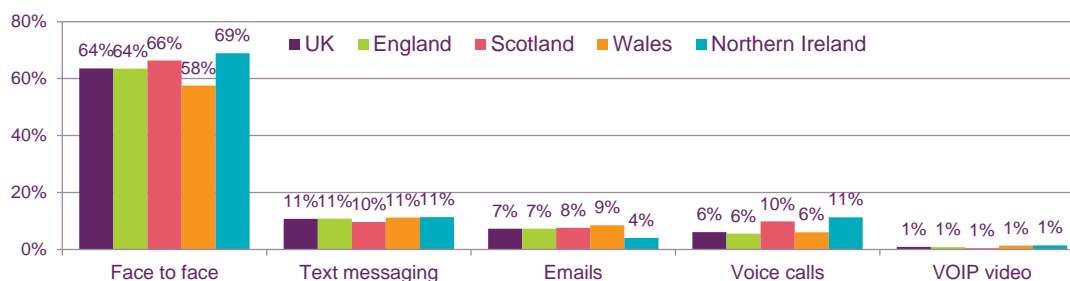
Voice calls (9% for family and 11% for friends), email (9% for family and 4% for friends) and text messaging (2% for family and 11% for friends) are the next preferred methods. Social media is notable for its low ranking for communicating with family members and close friends⁵.

Figure 1.5 Preferred methods of communicating with friends and family

Family members



Close friends



Source: Ofcom research, ‘Connected Devices’, May 2015

Base: All online adults aged 16+ who communicate with family members and close friends. Q52. And which of these methods do you prefer to communicate with ? Chart includes data for all responses 5% or over.

When communicating with groups of friends and family, one in five people in Northern Ireland prefer to use social media

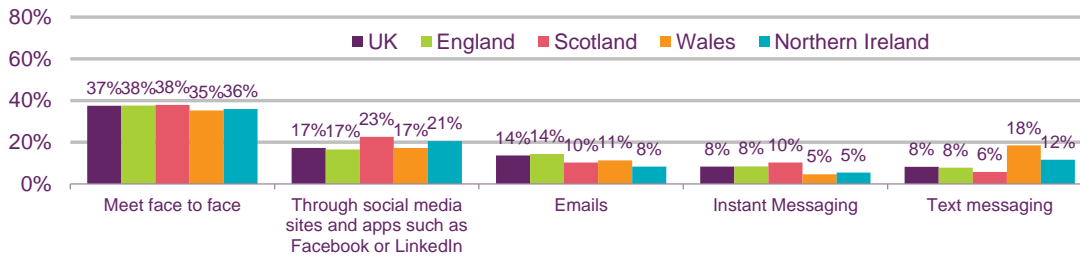
Figure 1.6 shows the preferred method for communicating with groups of family and friends. Whilst meeting face-to-face remains the preference for many (36% in Northern Ireland), social media is favoured by 21% of people, followed by text messaging (12%).

⁵ Data are shown for responses 5% or greater on the charts.

Figure 1.6 Preferred method of communicating with groups of friends and family: once a week or more often, by nation

Groups of family and friends

Proportion of online respondents %



Source: Ofcom research, 'Connected Devices', May 2015

Base: All online adults aged 16+ who communicate with groups of family and friends. Q52. And which of these methods do you prefer to communicate with ? Chart includes data for all responses 5% or over.

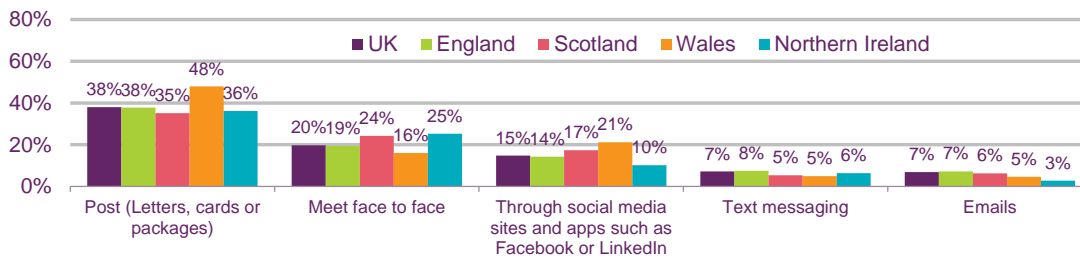
Overall, post is the preferred way of sending a greeting for a third of online adults in Northern Ireland

Figure 1.7 shows that around one-third of online adults in Northern Ireland (36%) use the postal service to send letters, cards or packets when they wish to send a greeting. A significant proportion (25%) prefer to meet face-to-face, while others (10%) prefer social media.

Figure 1.7 Preferred method of making birthday greetings and congratulations

Birthday greetings and congratulations

Proportion of online respondents %



Source: Ofcom research, 'Connected Devices', May 2015

Base: All online adults aged 16+ who send greetings for occasions and events such as birthdays, get well, congratulations, etc. Q52. And which of these methods do you prefer to communicate for ? Chart includes data for all responses 5% or over.

Communicating with people who are less well known

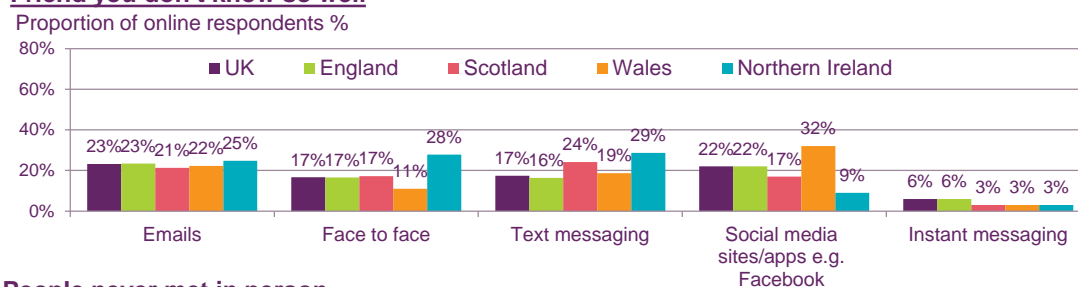
Text messaging and email are the preferred methods for communicating with people less well known

Figure 1.8 shows that in Northern Ireland the preferred method for contacting people known less well is split between text messaging (29%), face to face (28%) and email (25%).

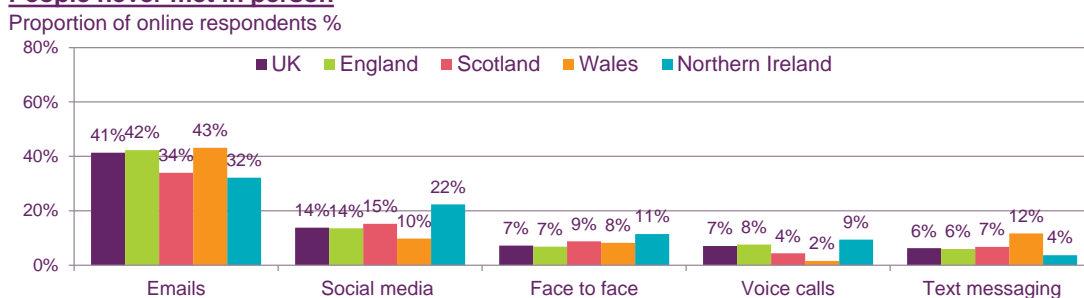
Email communications rank higher as a preference for contacting people never met in real life (32%), followed by social media (22%).

Figure 1.8 Preferred method of communicating with people less well known

Friend you don't know so well



People never met in person



Source: Ofcom research, 'Connected Devices', May 2015

Base: All online adults aged 16+ who communicate with friends not known so well and people never met in person.

Q52. And which of these methods do you prefer to communicate with ?

Chart includes data for all responses 5% or over.

Making new contacts online

Of the 18% of online adults in Northern Ireland who use dating websites, almost half have made new friendships through them

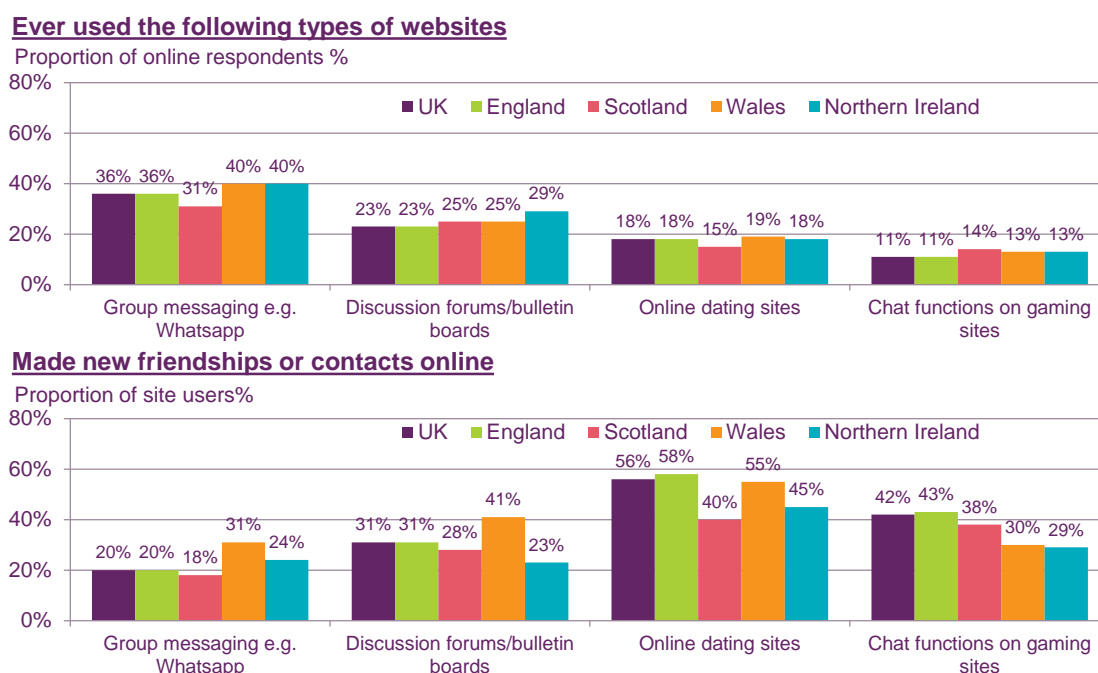
Much of the social media discussed in this section is one-way; that is, a user is posting or creating information that another user can choose to read or view. However, some activities can facilitate introductions between people, enabling them to form new contacts or even friendships.

Figure 1.9 shows the extent to which people use different types of social media, and whether they have formed new relationships via these types of sites.

Group messaging platforms such as WhatsApp and Snapchat are used commonly (40% of online adults use these types of site in Northern Ireland), followed by discussion forums and bulletin boards (29%) and dating websites (18%). Chat functions within gaming websites are the least used (13%).

Among the 18% of online adults in Northern Ireland who claim to have used dating websites, 45% have made new friendships through them. Chat functions in gaming websites (29%), messaging platforms (24%) and discussion forums and bulletin boards (23%) also provide opportunities to make new contacts, for a significant minority of users.

Figure 1.9 Use of different online activities to make new contacts



Source: Ofcom research, 'Connected Devices', May 2015

Base: All online adults aged 16+ and all website users aged 16+.

Q70. And have you ever used the following types of site ?

Q70a. And have you ever made new friendships or contacts online?

1.3 Social media

Introduction

Ofcom conducted a survey among internet users to investigate social media use and attitudes towards it. The data is sourced from the same questionnaire as covered in the previous section on personal communication networks⁶.

This section looks at Northern Ireland. It is worth noting that there are very few significant differences between Northern Ireland and the other nations, so the story is generally consistent with the other nations throughout⁷. All figures reported in the narrative relate to Northern Ireland unless stated otherwise.

Use of social networking sites

Facebook and YouTube are the most extensively used social media sites in Northern Ireland

According to Ofcom's Media Literacy study⁸, in terms of reach, Facebook is the most popular social media brand; 97% of adults with a social media profile use the site. The online survey

⁶ The survey was conducted by YouGov in May 2015 among an online sample of 2,290 UK adults. The number of interviews achieved by nation are: England = 1879, Scotland = 200, Wales = 113 and Northern Ireland = 98.

⁷ Due to low base sizes, the confidence with which the population average can be estimated within nation is limited. This means that only large differences between nations (between 8% and 18%) can be reported as significantly different at 95% confidence. No differences between nations are significant when these margins of confidence are applied.

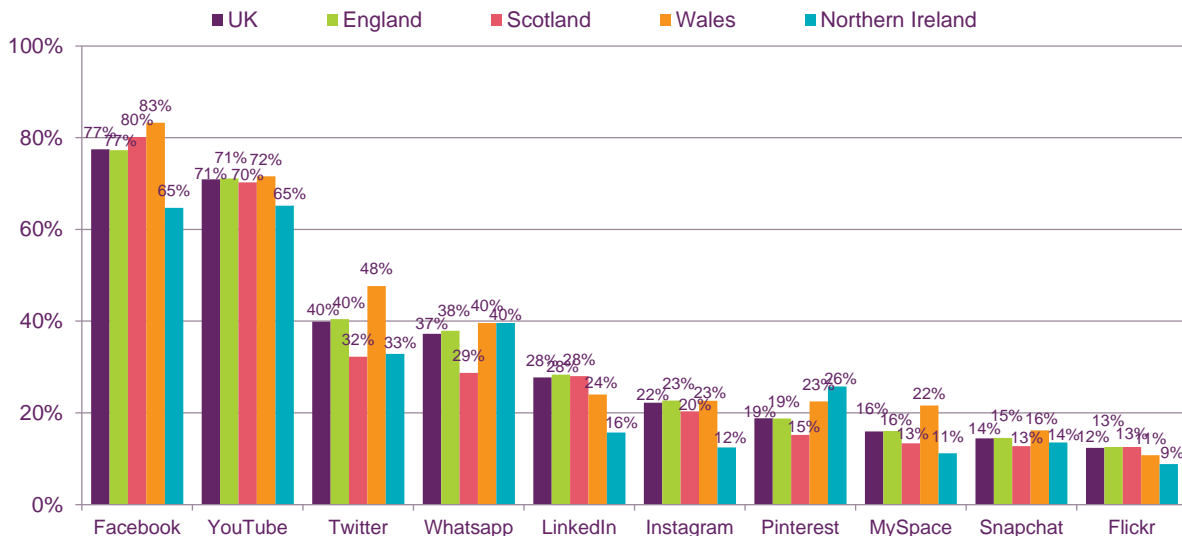
⁸ <http://stakeholders.ofcom.org.uk/market-data-research/other/research-publications/adults/media-lit-10years/>. Page 38.

findings indicate that in Northern Ireland Facebook’s reach (65%) is significantly lower than in the other nations, and is equal to that of YouTube (65%). WhatsApp (40%) and Twitter (33%) are also used by an increasing number of people in Northern Ireland.

Video- and photo-based communications such as Pinterest, Snapchat and Instagram are becoming increasingly popular

One-fifth of internet users in Northern Ireland have used Pinterest (26%). One in seven have used Snapchat (14%) and one in eight Instagram (12%). Flickr is used by one in ten (9%).

Figure 1.10 Websites and apps ever used, by nation: top ten responses



Source: Ofcom research, ‘Connected Devices’, May 2015

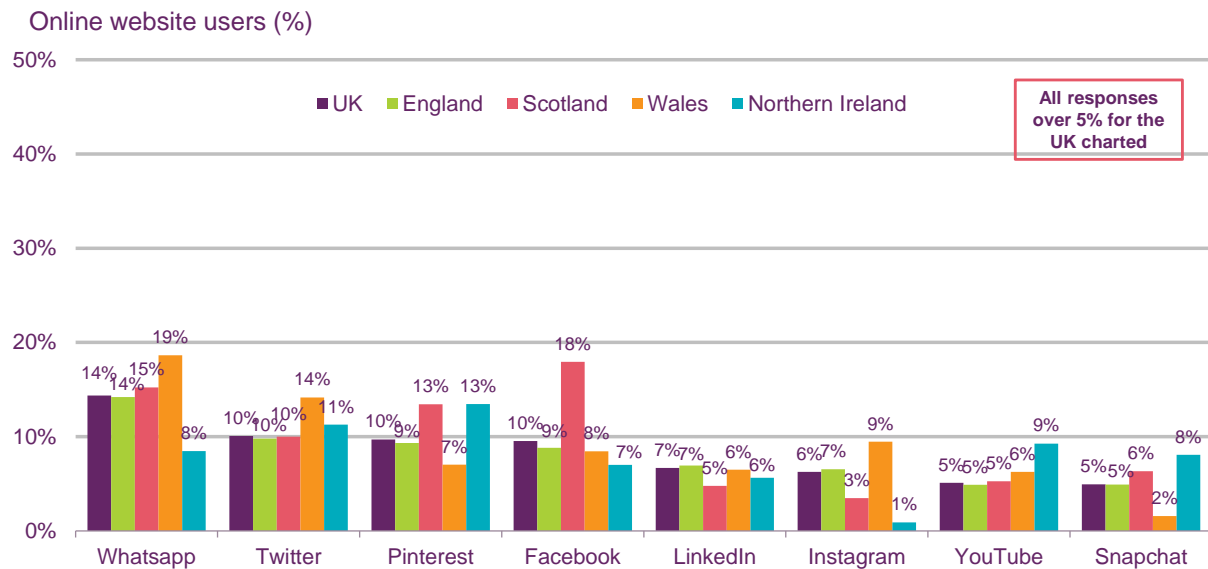
Base: All online adults aged 16+ (n=2290), England (n=1879), Scotland (n=200), Wales (n=113), Northern Ireland (n=98).

Q60. Which of the following websites have you ever used? (Top ten responses shown)

Pinterest, WhatsApp and Snapchat feature as ‘most recent additions’ for some online users in Northern Ireland

As a method of identifying recent trends in website and app use, a question was asked regarding the ‘most recent addition’. The responses show signs of the emerging use of newer image- and photo-based websites in Northern Ireland. Among those who claimed to use any of the social networking/communication portals with which they were prompted (see Figure 1.11) Pinterest was cited by 13% of website users in Northern Ireland as ‘the most recent addition’. Twitter (11%), YouTube (9%), Snapchat (8%) and WhatsApp (8%) were also cited as ‘recent additions’ for around one in ten.

Figure 1.11 Site or app most recently used



Source: Ofcom research, 'Connected Devices', May 2015

Base: All website users aged 16+ (n=1179), England (n=1457), Scotland (n=161), Wales (n=90), Northern Ireland (n=71).

Q61d. Which one is your most recent addition?

Chart includes data for all responses 5% or over.

Over half of people in Northern Ireland who take digital photos say they share them on social media

The use of photo- and image-based sites is also revealed by Ofcom research into how people take and share photos⁹. Sixty-nine per cent of adults in Northern Ireland take digital photos, and the mobile phone is the device most often used for this: 51% of adults in Northern Ireland have ever taken photos with a mobile phone, and 45% say this is the device they use most often.

Over half (56%) of people in Northern Ireland who take digital photos say they share their photos using social media. Many of these are likely to be selfies. Over a quarter (27%) of people in Northern Ireland say they have ever taken a selfie, and 4% say they take selfies at least once a week.

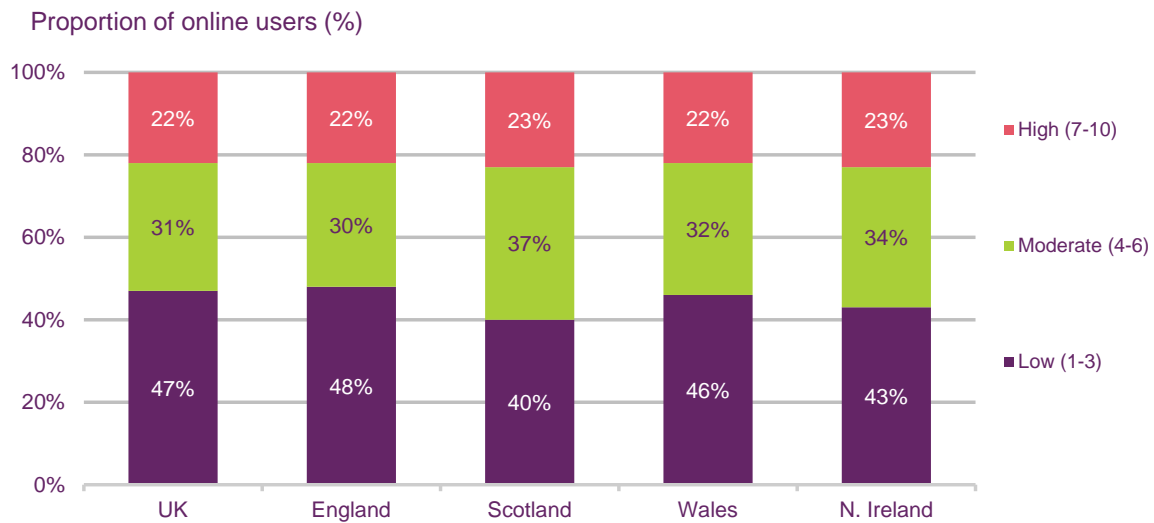
Attitudes to social media

Over one in five people say that they are 'hooked' on social media

In order to understand the extent to which social media is a part of people's lives, we asked people to indicate a number on a scale where 1 equated to 'I'm not at all hooked on social media' to 10: 'I'm completely hooked on social media'. Overall, just over one in five adults (23%) in Northern Ireland indicated a rating of between 7 and 10 (see Figure 1.12), suggesting that these people perceive themselves to be 'hooked on social media'. A similar and consistent pattern is seen across all the nations.

⁹ Findings taken from the Kantar Media Omnibus, a Face to Face survey commissioned by Ofcom and representative of all UK adults.

Figure 1.12 Extent to which people are ‘hooked’ on social media, by nation



Source: Ofcom research, ‘Connected Devices’, May 2015

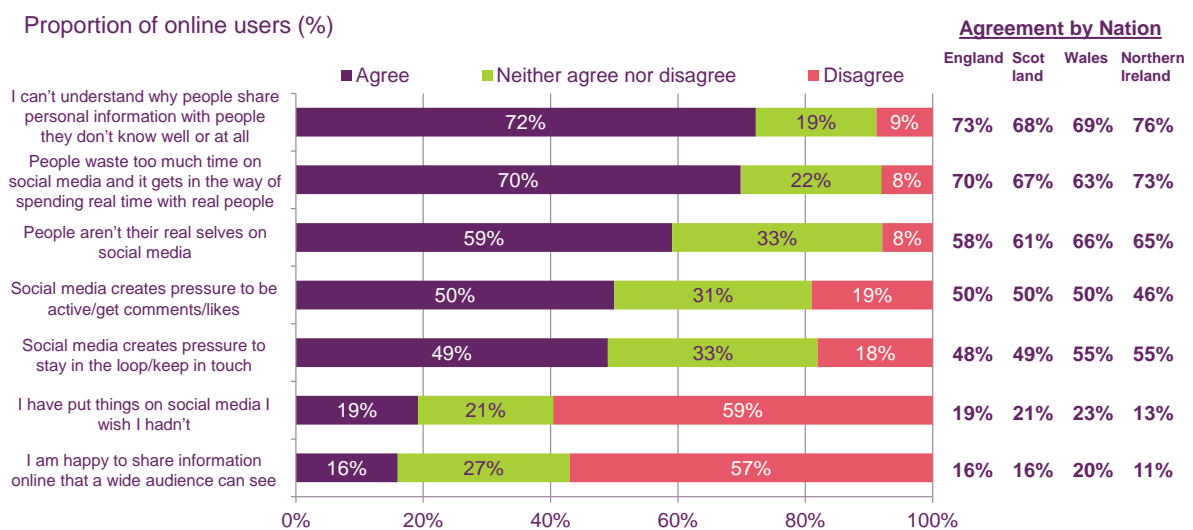
Base: All online adults aged 16+ (n=2290), England (n=1879), Scotland (n=200), Wales (n=113), Northern Ireland (n=98).

Q91. If you had to choose a number between 1 and 10, where 1 represented ‘I’m not at all hooked on social media’ and 10 represented ‘I’m completely hooked on social media’, which number would you choose for yourself?

One in five have posted things online they wish they hadn’t

There are concerns about privacy in relation to social media use: Figure 1.13 shows that three-quarters of adults in Northern Ireland (76%) agree that they ‘can’t understand why people share personal information with people they don’t know well or at all’. A similar proportion of people (73%) in Northern Ireland agree that ‘people waste too much time on social media’. One in eight (13%) have put things online they wish they hadn’t; lower than levels in the other nations, but not significantly so.

Figure 1.13 Level of agreement with statements about social media



Source: Ofcom research, ‘Connected Devices’, May 2015

Base: All online adults 16+ = 2290

Q90 How much do you agree or disagree with the following statements regarding social media?

1.4 Changes in audio-visual consumption in Northern Ireland

Broadcast TV viewing

BARB analysis is based on viewing to scheduled TV programmes such as those listed in TV listings magazines or on electronic programme guides (EPG) on TV sets. Broadcast TV viewing refers to TV programmes watched on the TV set live at the time of broadcast (traditional TV viewing), recordings of these programmes or viewing of these programmes through catch-up player services (referred to as time-shifted), up to seven days after they were televised.

Traditional TV viewing

'Traditional TV viewing' refers to TV programmes watched live at the time of broadcast on the TV set.

Non-traditional TV viewing

'Non-traditional TV viewing' refers to TV programmes that are not watched live at the time of broadcast. This includes viewing of TV programmes through the use of personal video recorders, catch-up services, on-demand subscription services and pay-per-view services.

In 2014, people in Northern Ireland spent on average 15 minutes less per day than in 2013 watching broadcast TV

On average, individuals in Northern Ireland watched 227 minutes (3 hours 47 minutes) of broadcast TV a day in 2014¹⁰; 15 minutes less per day than in 2013. (Figure 1.14)¹¹. This was the largest decline across the nations, compared to a fall of 12 minutes per day in Wales, 7 minutes in Scotland and 11 minutes across the UK (network) as a whole.

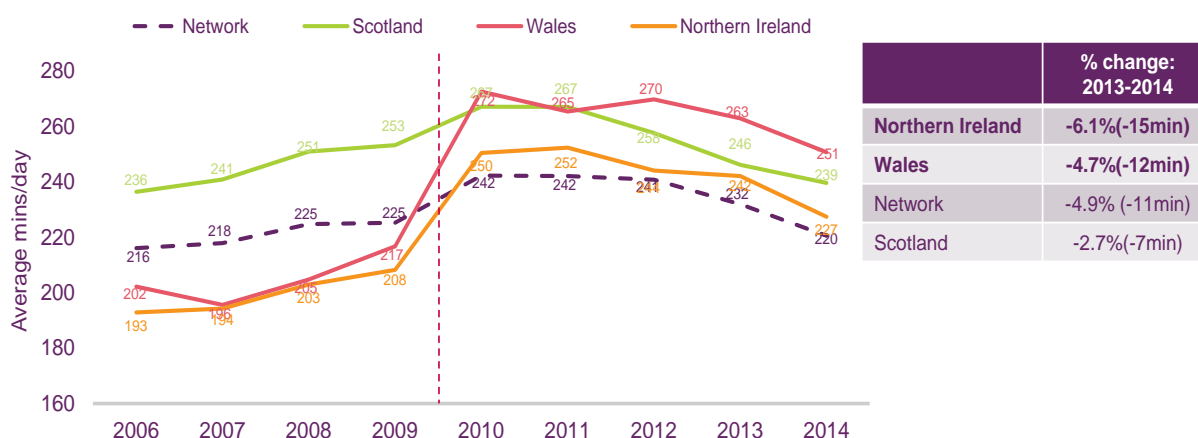
Among the devolved nations, Northern Ireland had the lowest average minutes of TV viewing per day, but was above the UK average.

10 When analysing BARB data we refer to viewing of programmes at the time of broadcast (live), any recordings of these programmes, and if watched through a broadcaster catch-up service (eg BBC iPlayer) within seven days of initial transmission.

11 The rise in viewing seen in Figure 1.14 and Figure 1.15 **Error! Reference source not found.** between 2009-2010 across some regions such as Wales, the North East, and Border may be linked to specific regional BARB panel changes that occurred when the new BARB panel was introduced on 1 January 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

Figure 1.14 Average minutes of television viewing per day, by nation: all homes

Average minutes of viewing/day by TV region: Total TV, Individuals 4+



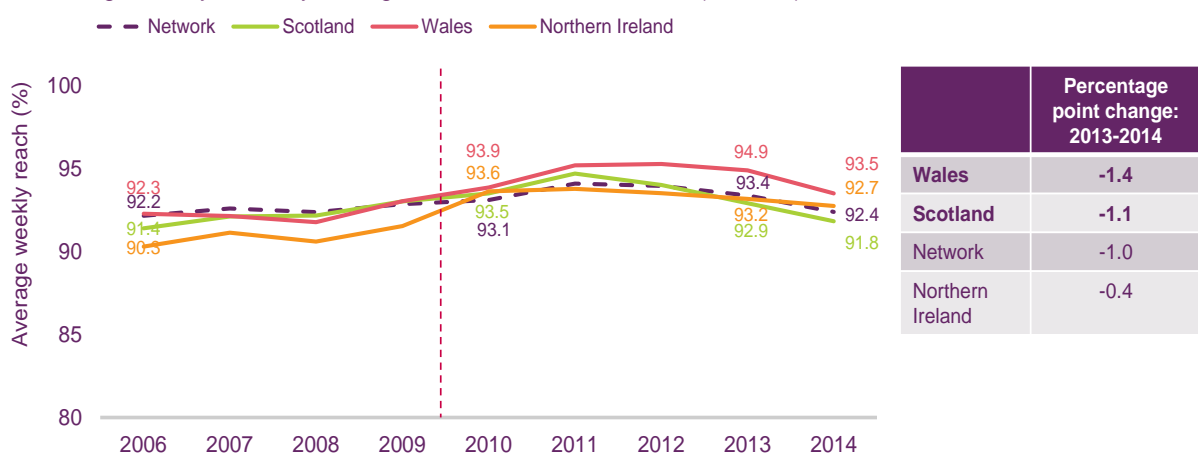
Source: BARB. Note: New BARB panel introduced 1 January 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line). Note: Year-on-year percentage changes are calculated on data to two decimal places.

Over nine in ten individuals (92.7%) in Northern Ireland watch TV every week, 0.4 percentage points less than in 2013

Average weekly reach in Northern Ireland remained the steadiest compared to the other devolved nations and the UK as a whole, falling by just 0.4 percentage points in 2014. In each of the nations and the UK as a whole, the proportion of individuals who watched TV in an average week was over 90%. (Figure 1.15).

Figure 1.15 Average weekly reach of total TV, by nation

Average weekly reach by TV region: Total TV, Individuals 4+ (15 min+)



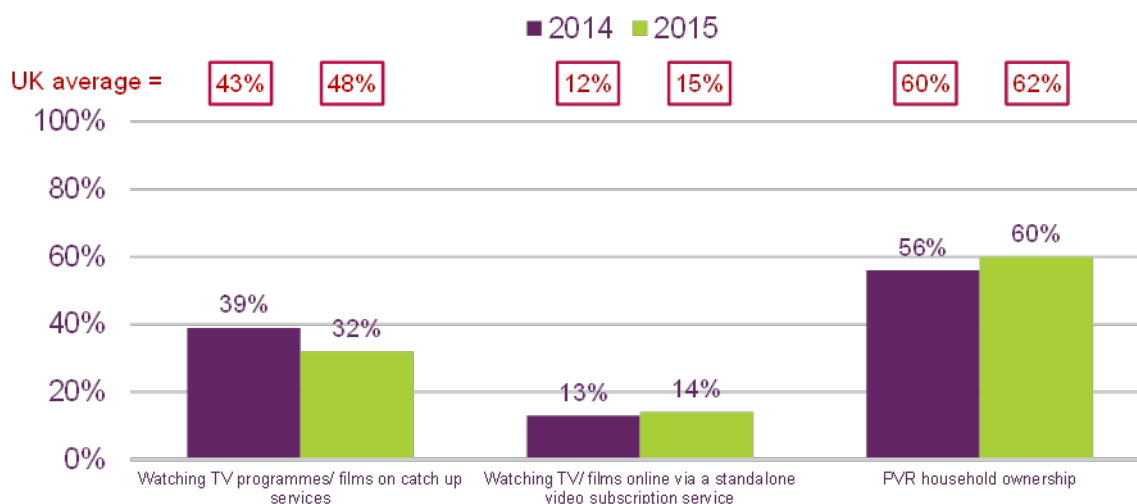
Source: BARB. Reach criteria = 15 consecutive minutes of viewing at least once in the average week. Full weeks used. Note: New BARB panel introduced 1 January 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

A third of all adults in Northern Ireland used catch-up services such as iPlayer, ITV Player and All 4 in 2015

Figure 1.16 shows the year on year change in the use of ‘non-traditional TV viewing’ methods in Northern Ireland from the *Ofcom Technology Tracker*. The three methods covered are: catch-up services (e.g. iPlayer, ITV Player, All 4), standalone video subscription services (e.g. Netflix, Amazon Instant) and personal video recorders (PVRs).

Just under a third (32%) of adults in Northern Ireland said they had used catch-up services in 2015, a decrease of 7 percentage points since the same time in 2014. Catch-up usage in Northern Ireland is lower than in Scotland (49%), Wales (48%) and the UK as a whole (48%). Use of both standalone video subscription services (14%) and PVRs (60%) is to the same as the UK average (15% and 62% respectively).

Figure 1.16 Use of catch-up, standalone video subscription and PVRs in Northern Ireland



Source: *Ofcom Technology Tracker, W1 2015*

Base: All adults aged 16+ (UK 2014 = 3740, NI 2014 = 499; UK 2015 = 3756, NI 2015 = 504)

QH17 (QH46): Thinking about your personal use of TV programmes and films online and on demand services that you may use on any device (e.g. smartphone, TV set, tablet or laptop) anywhere, which of the following, if any, have you personally ever used? QR1A-B: Does your household have Sky+/ Virgin TiVo or V+? QR1C-E: Does your Freesat set top box/ Freeview box or Freeview TV set / broadband TV service allow you to record and store TV programmes, and also pause and rewind live TV programmes? QR1F-G: Do you have a YouView/ Now TV set top box?

Consumer research on the decline in traditional TV viewing

In order to better understand the decline in traditional TV viewing¹², as identified through the previous BARB analysis, Ofcom commissioned omnibus research in April 2015. The research was carried out by GfK NOP among 1,878 UK adults aged 16 years and above, with additional boost interviews in Northern Ireland to allow individual nations' reporting¹³.

¹² Traditional TV viewing refers to TV programmes watched live at the time of broadcast on the TV set.

¹³ Only a boost in Northern Ireland was needed, as sample sizes in the other nations were sufficient in the main sample.

The research resulted in 163 interviews in Scotland, 99 interviews in Wales and 110 interviews in Northern Ireland¹⁴.

The research asked consumers to identify which audio-visual related activities they were doing more or less of, compared to a year ago¹⁵. The purpose of this was to provide a view of changes in behaviour across different features, e.g. screen used (TV vs. other), location of viewing (in home vs. out and about), traditional or non-traditional viewing (e.g. at time of broadcast vs. catch-up, personally recorded, subscription on-demand or pay-per-view), and content viewed (e.g. programmes from BBC/ ITV/ UTV/ STV/ Channel 4 or Five, short clips, box sets/ series, films). As abbreviations are used in this section, the full question wording and list of activities asked about are shown at the end of the section.

Research found increases in use of non-traditional viewing methods: non-subscription catch-up, watching recorded content and subscription on-demand services.

Figure 1.17 shows claimed changes in specific audio-visual activities among respondents in the nations and the UK as a whole, while Figure 1.18 shows the broader findings for Northern Ireland in more detail.

In the UK overall, the research identified claimed decreases in traditional TV viewing (that is, viewing 'at the time of broadcast') and also viewing 'via the TV set' over the past year. In parallel, respondents claimed to have increased their 'non-traditional' TV viewing; i.e. net gains were found for watching non-subscription catch-up, content they had personally recorded, and subscription on-demand services.

Respondents in Northern Ireland indicated that, overall, they were doing less traditional TV viewing. In April 2015, 8% said they watching more TV at the time of broadcast than in the previous year, while 33% said they were doing this less, resulting in a net change of -25%.

Claimed increases in 'non-traditional' TV viewing were particularly marked in Northern Ireland compared to the UK overall. Net gains were +39% for watching non-subscription catch-up, +32% for watching personally recorded content, and +22% for using subscription on-demand services.

In Northern Ireland respondents were more likely to say they were watching less programmes on public service broadcasting channels (BBC/ UTV/ Channel 4 and Five). Six per cent said they watching these more in April 2015 than in the previous year, while 34% said they were doing it less; a net change of -28%. This degree of change was not seen in the other nations, or the UK overall.

¹⁴ The Northern Ireland boost interviews and the main interviews are reported together as a sample within the nations' CMR, although the Northern Ireland boost interviews were not included in the overall UK sample.

¹⁵ The research identified respondents' own views on changes in their viewing and related behaviour, but it does not indicate the *volume* of change, e.g. minutes of viewing increased or decreased.

Figure 1.17 Claimed changes in key audio-visual activities over the past year (%), by nation

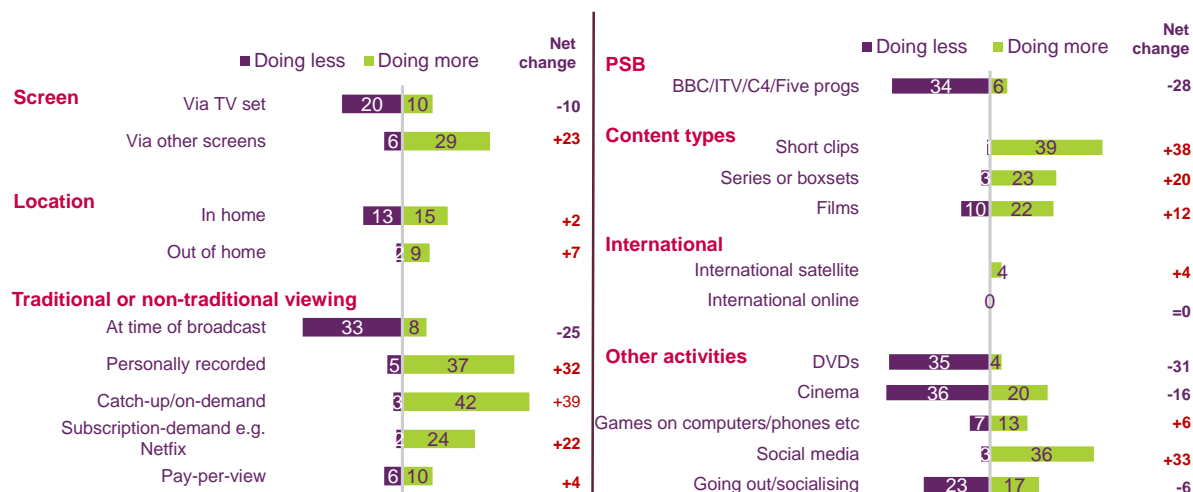
		Net change				
		UK (1878)	England (1568)	Scotland (163)	Wales (99)	Northern Ireland (110)
Screen	Watching via TV set	-7%	-7%	-6%	+15%	-10%
	Watching via other screens	+13%	+13%	+16%	+25%	+23%
Location of viewing	In home	0	-2%	+6%	+12%	+2%
	Out of home	-4%	-6%	0	+7%	+7%
Traditional or non-traditional viewing	At time of broadcast	-19%	-17%	-34%	-19%	-25%
	Personally recorded	+13%	+11%	+24%	+18%	+32%
	Catch-up/on-demand	+26%	+23%	+36%	+40%	+39%
	Subscription-demand e.g. Netflix	+8%	+7%	+15%	+13%	+22%
	Pay-per-view	-3%	-3%	-3%	-2%	+4%
Public Service Broadcasting	Watching BBC, ITV/STV/UTV, C4, Five programmes	-6%	-5%	-3%	-9%	-28%

Source: GfK NOP omnibus, April 2015.

Base: All adults (1878). Question wording: QA, For each of the following activities please say if you are doing this more, the same amount or less now compared to a year go? This reports the 'net gain' or 'net loss' for an activity. For example, if 20% of respondents said they did an activity more and 5% said they did an activity less, the net gain would be +15% doing the activity more.

Figure 1.18 Claimed changes in activities over the past year (%): Northern Ireland

Claimed changes in viewing over last year (%)



Source: GfK NOP omnibus, April 2015. Base: All adults 16+ in Northern Ireland (110). Question wording: QA, For each of the following activities please say if you are doing this more, the same amount or less now compared to a year go?

Ofcom omnibus: research question wording

For each of the following activities I read out can you say whether you are doing this more, the same amount or less now compared to a year ago? If you have never done the activity at all, please just tell me. INTERVIEWER: READ OUT EACH STATEMENT INDIVIDUALLY. SINGLE CODE FOR EACH STATEMENT

Screen

- Using a TV set to watch any programmes/films/clips i.e. watching any programmes/films/clips using any service (e.g. Freeview, Sky, Netflix, BBC iplayer, via a games console etc)
- Using other screens to watch any programmes/films/clips e.g. home computers, tablets, smartphones (rather than the TV set)

Location

- Watching any TV, clip, programme when in your own home (watching could be on any screen e.g. TV, home computers, tablets, smartphones)
- Watching any TV, clip, programme when out and about (watching could be on any screen e.g. TVs, computers, tablets, smartphones)

Traditional or non-traditional viewing

- Watching TV programmes as they are broadcast on TV (e.g. watching EastEnders when it is shown on BBC1 at 7.30pm or watching Game of Thrones at 9pm on Sky Atlantic when it is broadcast)
- Watching TV that you have personally recorded, i.e. after recording it onto a set-top box, or PVR
- Watching any 'catch-up' or on-demand TV where you watch programmes/films that have been shown on TV recently (via services like BBC iplayer, itv player, 4OD, SkyGo, Virgin Catch-up etc).
- Watching programmes/films through on-demand services that you pay a monthly subscription for like Netflix, Amazon Prime, Now TV etc
- Paying to watch individual programmes/films e.g. films through Sky's Box Office service or 'Pay per movie' with Virgin Movies

PSB

- Watching BBC, ITV/STV/UTV, Channel 4 or Five programmes in particular (through any channel, any screen and at any time)

Content

- Watching short clips e.g. like those found on Youtube, or linked on social media like Facebook
- Watching series or boxsets in any way, e.g. on TV, tablets, DVDs, Netflix etc
- Watching films (through any service, e.g. Netflix, Now TV, DVDs on either your TV set, computers or smartphones)

International

- Watching international channels via satellite services from other countries e.g. Hotbird, Turksat, Hellas Sat), Hispasat, Canal+, Cyfra.
- Watching programmes/films through international online video services from other countries, e.g. RTÉ Player, Hulu, My TF1, nc+

Other activities

- Watching DVDs
- Going to the cinema to watch films
- Playing games on a console, computer, tablet or smartphone etc
- Using social media e.g. Facebook, etc
- Going out and socialising

2 Television and audio-visual content

2.1 Recent developments in Northern Ireland

BBC and Northern Ireland Screen sign partnership deal

The BBC and Northern Ireland Screen have signed a new partnership agreement¹⁶ to support television and online industries in Northern Ireland. They will work together to invest “financially and creatively” in developing an internationally competitive screen industry in Northern Ireland. They also aim to ensure that Northern Ireland is represented to audiences in the UK and internationally. The BBC will invest a minimum of 2.9% of its network television spend in Northern Ireland in 2016. This is in addition to the investment provided by BBC Northern Ireland.

UTV expands into the Republic of Ireland

UTV Media’s new RoI TV channel, *UTV Ireland*, started broadcasting on 1 January 2015. The station was granted the Irish equivalent of PSB status, and given the prime EPG channel 6 slot on Saorview, the RoI’s equivalent of Freeview. The new channel offers a mix of ITV network and locally sourced programming, some of which is shared with UTV in Northern Ireland. UTV Media’s ambition is that it will be the second most-watched channel in the Republic of Ireland after RTE One “within a two-year timeframe”.

RTÉ plans advertising opt-outs in Northern Ireland

Republic of Ireland (RoI) state broadcaster RTÉ is planning to offer advertising opt-outs on its services broadcast in Northern Ireland for the first time. RTÉ is available to around 94% of the Northern Ireland population through a free-to-air platform – either Freeview or Saorview. RTÉ One and RTÉ2 are also carried on satellite (Sky) and cable (Virgin Media) giving near-100% availability of these services in Northern Ireland.

Channel 4 commissioning from the nations

Channel 4 exceeded its 3% quota of nations’ output and spend in 2014, with first-run originated programming from the nations on the main channel amounting to 6.1% of output and 6.0% of spend. The majority of this spend was in Scotland (4.6%) followed by Wales (1.1%), with 0.3% spent in Northern Ireland.

In Northern Ireland this equated to approximately 5 hours of first-run programming on Channel 4’s main channel in 2014. This compares to 131 hours from Scotland, and 30 hours from Wales. Channel 4 spent £1m in Northern Ireland during 2014 across the its full family of channels. In total, the channel spent £21m in the nations (£16m in Scotland and £4m in Wales).¹⁷

As part of its licence renewal in 2014, Channel 4 received a nations’ quota of 3% of output and spend, increasing to 9% in 2020. It has held a number of commissioning events across the nations during 2014.

¹⁶ Press release: <http://www.bbc.co.uk/mediacentre/latestnews/2015/bbc-ni-screen-partnership>

¹⁷ Source: <http://www.channel4.com/media/documents/corporate/annual-reports/C4%20Annual%20Report%202015.pdf>

Local TV launches in Belfast

Belfast-based local TV station, NVTV, started broadcasting in September 2014. The channel is available on Freeview channel 8 in the Greater Belfast area and on Virgin Media channel 159. NVTV broadcasts from 6pm - 11pm, 7 days per week.

2.2 Digital television take-up in Northern Ireland

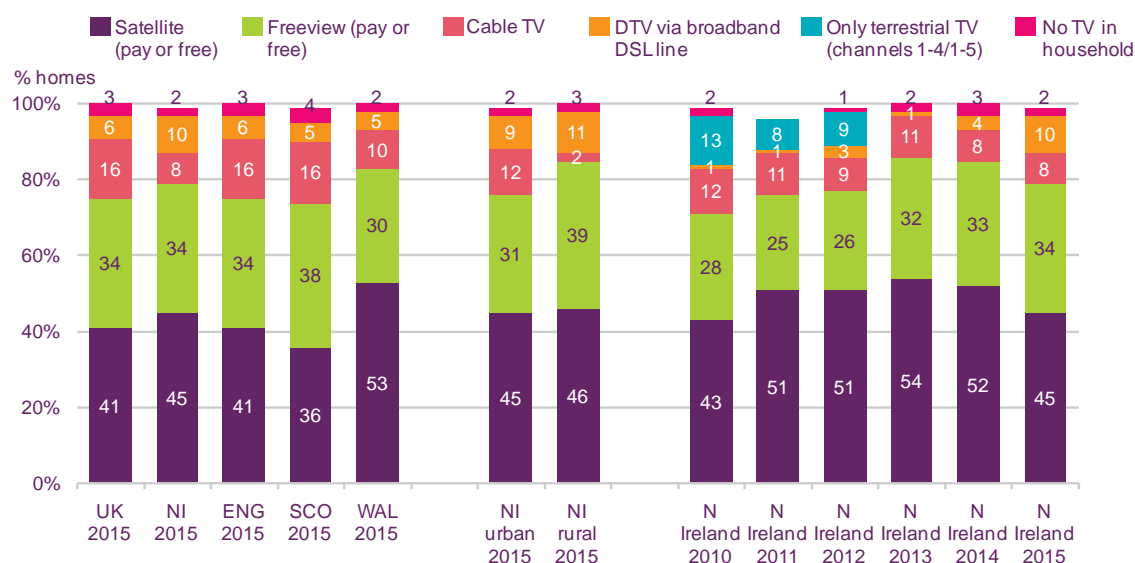
Almost half of households in Northern Ireland have satellite television as their main TV platform

Figure 2.1 shows that in 2015, satellite television (pay or free) remained the main TV service for households in Northern Ireland (45%). Since 2014, however, take-up of satellite has declined by 7pp (from 52%). The only type of TV service which has increased in Northern Ireland since 2014 is DTV via a broadband connection, rising by 6pp from 4% to 10% in 2015.

Compared to the UK as a whole, households in Northern Ireland are less likely to have cable television (8% vs. 16%) and more likely to have DTV via a broadband connection (10% vs. 6%). The proportion of households in Northern Ireland whose main television service is satellite (45%) or Freeview (34%) was similar in 2015 to the UK average.

Take-up of satellite, Freeview¹⁸ and DTV services was similar across urban and rural areas of Northern Ireland in 2015. As in previous years, take-up of cable television was higher in urban than in rural areas (12% vs. 2%), due to the greater availability of cable services.

Figure 2.1 Main television set share, by platform



Source: Ofcom Technology Tracker, wave 1 2015

Base: All adults aged 16+ (n = 3756 UK, 504 Northern Ireland, 2264 England, 492 Scotland, 496 Wales, 249 Northern Ireland urban, 255 Northern Ireland rural, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013, 499 Northern Ireland 2014, 504 Northern Ireland 2015)

QH1a. Which, if any, of these types of television does your household use at the moment?/ QH1b And which of these do you consider is your main type of television?

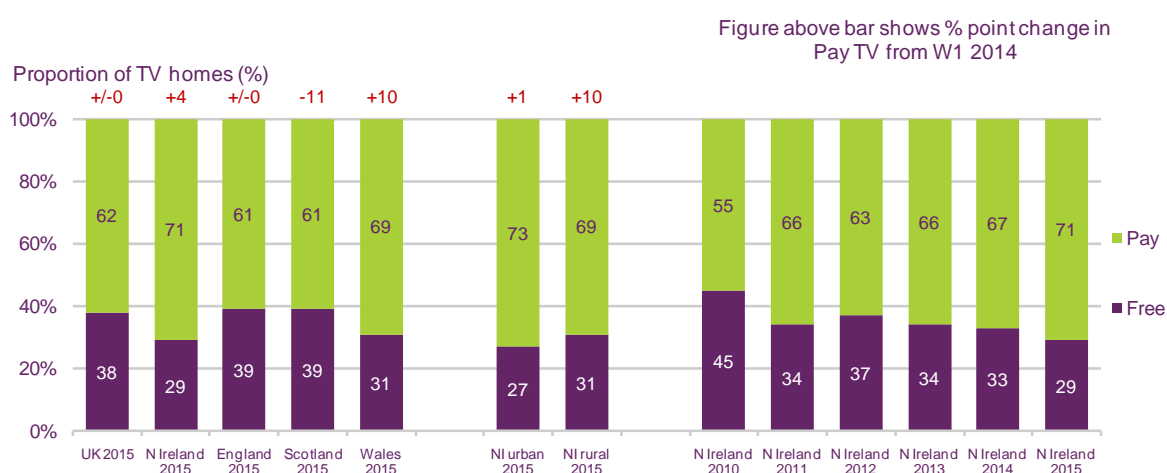
¹⁸ While the apparent difference is 8pp, this is not statistically significant.

Seven in ten TV homes in Northern Ireland have pay TV

Northern Ireland continued to have a higher than average proportion of TV homes with a pay-TV service; seven in ten homes with a TV (71%) were reported to have paid-for satellite, cable or broadband TV, or top-up channels on the Freeview service. This incidence is higher than the UK average (62%).

The proportion of TV homes in Northern Ireland in 2015 with a pay-TV service was unchanged year on year (67% in 2014 and 71% in 2015) and similar between urban (73%) and rural (69%) areas. Since 2014, there has been an increase in the proportion of TV homes with a pay-TV service in rural areas of Northern Ireland (from 59% to 69%).

Figure 2.2 Proportion of homes with free and pay television



Source: Ofcom Technology Tracker, wave 1 2015

Base: All adults aged 16+ with a TV in the household (n = 3616 UK, 462 Northern Ireland, 2197 England, 472 Scotland, 485 Wales, 230 Northern Ireland urban, 232 Northern Ireland rural, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 492 Northern Ireland 2013, 488 Northern Ireland 2014, 462 Northern Ireland 2015)

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

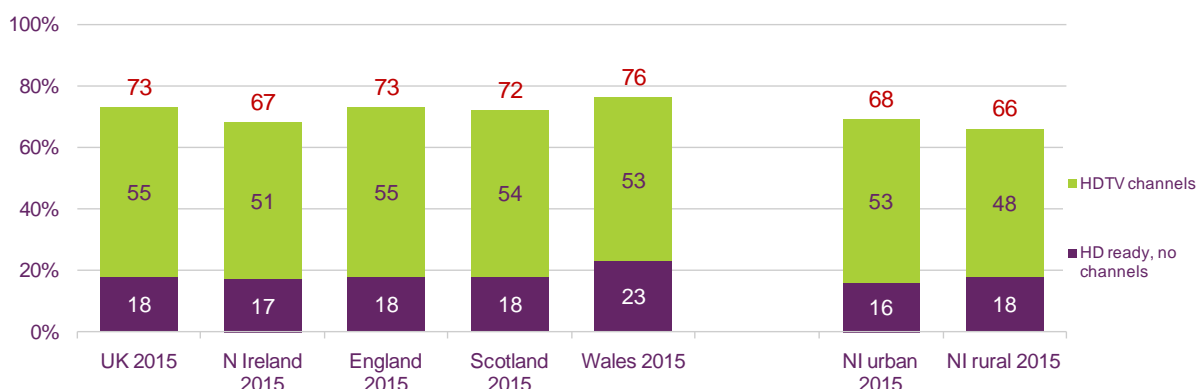
Half of all households in Northern Ireland have HD TV services

Two-thirds of households in Northern Ireland (67%) have at least one TV set that is 'HD-ready' and able to display high definition output. This incidence is unchanged since 2014. Half of households in Northern Ireland (51%) receive HDTV services; a further 17% have a HD-ready TV but do not receive HD services.

The incidence of HD-ready TV set ownership in Northern Ireland (67%) is lower than the UK average (73%).

The proportion of households owning an HD-ready set or receiving an HDTV service does not differ between urban and rural households in Northern Ireland.

Figure 2.3 Proportion of homes with HD television



Source: Ofcom Technology Tracker, wave 1 2015

Base: All adults aged 16+ (n = 3756 UK, 504 Northern Ireland, 2264 England, 492 Scotland, 496 Wales, 249 Northern Ireland urban, 255 Northern Ireland rural)

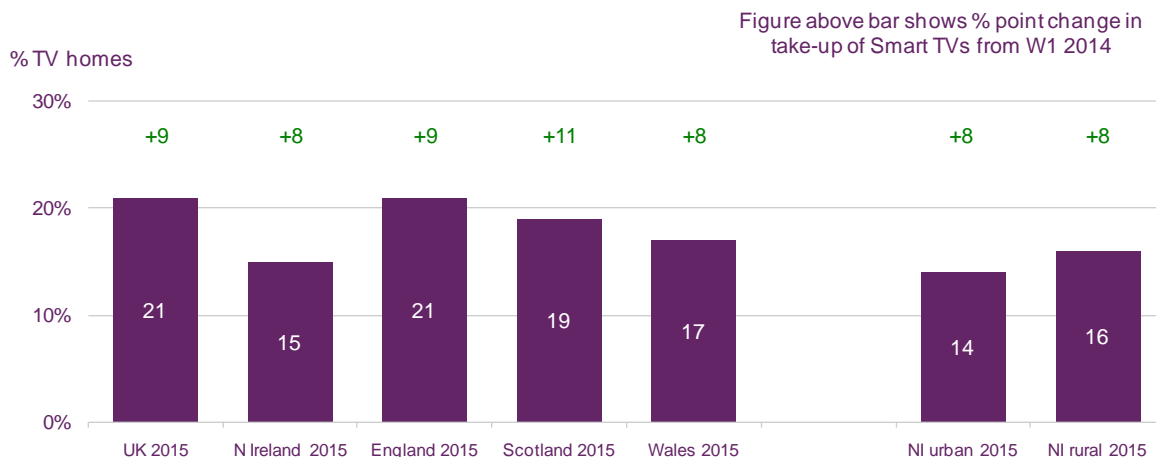
QH53. Is the main TV in your household an HDTV set or HD ready?/ QH54. For the main TV set, does your household have an HD TV service – from either Sky, Virgin Media, Freesat or Freeview?

Smart TV take-up has increased 8pp year on year but remains lower than the UK average

Take-up of smart TV sets has increased significantly since 2014, both in Northern Ireland (up 8pp) and in the UK as a whole (up 9pp), although take-up in Northern Ireland remains lower than the UK level (15% vs. 21%).

Levels of smart TV ownership do not differ significantly between households in urban (14%) and rural (16%) areas in Northern Ireland.

Figure 2.4 Smart TV take-up



Source: Ofcom Technology Tracker, wave 1 2015

Base: All adults aged 16+ with a TV in the household (n = 3616 UK, 462 Northern Ireland, 2197 England, 472 Scotland, 485 Wales, 230 Northern Ireland urban, 232 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.

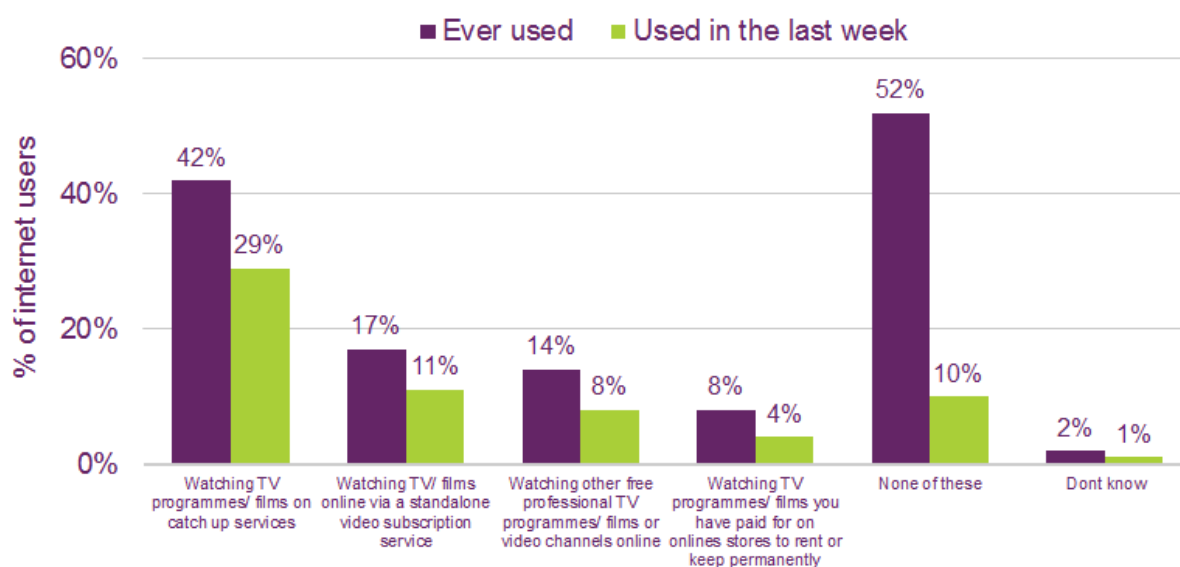
Catch-up services are the most popular way to watch TV programmes and films online among internet users in Northern Ireland

Among those in Northern Ireland who use the internet at home or elsewhere (e.g. on their smartphone, tablet or laptop), over two in five (42%) say they have ever watched TV programmes or films on a catch-up service (e.g. iPlayer, ITV Player, All4). Just under one in three (29%) internet users claimed to have watched these services in the past week.

Use of stand-alone video subscription services (e.g. Netflix, Amazon Instant) and free professional sources (e.g. official YouTube channels, producers' websites) are less popular, with less than one in five (17% and 14% respectively) internet users in Northern Ireland claiming to have ever used them. Less than one in ten (8%) internet users in Northern Ireland had ever watched TV programmes or films that they had bought or rented digitally.

Just over half (52%) of adults in Northern Ireland who use the internet at home or elsewhere have never used any of these services. This figure is the highest of the devolved nations; fewer internet users in Scotland (32%) and Wales (38%) say they have never used any of these services.

Figure 2.5 TV programmes and films, on demand, on any service



Source: Ofcom Technology Tracker, wave 1 2015

Base: All NI adults aged 16+ who use the internet at home or elsewhere (n = 383)

QH17 (QH46)/QH18 (QH47): Thinking about your personal use of TV programmes and films online and on-demand services that you may use on any device (e.g. smartphone, TV set, tablet or laptop) anywhere, which of the following, if any, have you personally ever used? And which, if any, of these have you used in the last week?

2.3 Broadcast television content

Broadcast TV viewing

BARB analysis is based on viewing to scheduled TV programmes such as those listed in TV listings magazines or on electronic programme guides (EPG) on TV sets. 'Broadcast TV viewing' refers to TV programmes watched on the TV set live at the time of broadcast (traditional TV viewing), recordings of these programmes or viewing of these programmes through catch-up player services (referred to as time-shifted), up to seven days after they were televised.

People in Northern Ireland spend an average of 3 hours 47 minutes per day watching TV

In 2014, people in Northern Ireland spent an average of 227 minutes (3 hours 47 minutes) per day watching television, less than in the other devolved nations but more than the UK average (220 minutes or 3 hours 40 minutes). Of the 227 minutes spent watching television, 159 minutes was spent watching the PSB family of channels (the main five PSB channels,¹⁹ together with the PSB portfolio channels²⁰) (Figure 2.6).

Figure 2.6 Average minutes of television viewing per day, by nation: 2014



Source: BARB, *Individuals (4+)*. Main five PSB channels = BBC One, BBC Two, ITV, Channel 4 and Channel 5, including HD variants but excluding +1s. PSB portfolio channels = BBC Three, BBC Four, BBC News, BBC Parliament, CBBC, CBeebies, BBC streaming channels, ITV+1 Network (inc ITV Breakfast), ITV2, ITV2+1, ITV3, ITV3+1, ITV4, ITV4+1, CITV, Channel 4+1, E4, E4 +1, More4, More4 +1, Film4, Film4+1, 4Music, 4seven, Channel 5+1, 5*, 5*+1, 5USA, 5USA+1. HD variants are included where applicable.

*Note: This figure reflects the average across the English regions, with the highest in Border at 250 minutes (4 hours 10 minutes) and the lowest in West at 197 minutes (3 hours 17 minutes) respectively.

¹⁹ Main five PSB channels = BBC One, BBC Two, ITV, Channel 4 and Channel 5. Includes HD variants but excludes +1s.

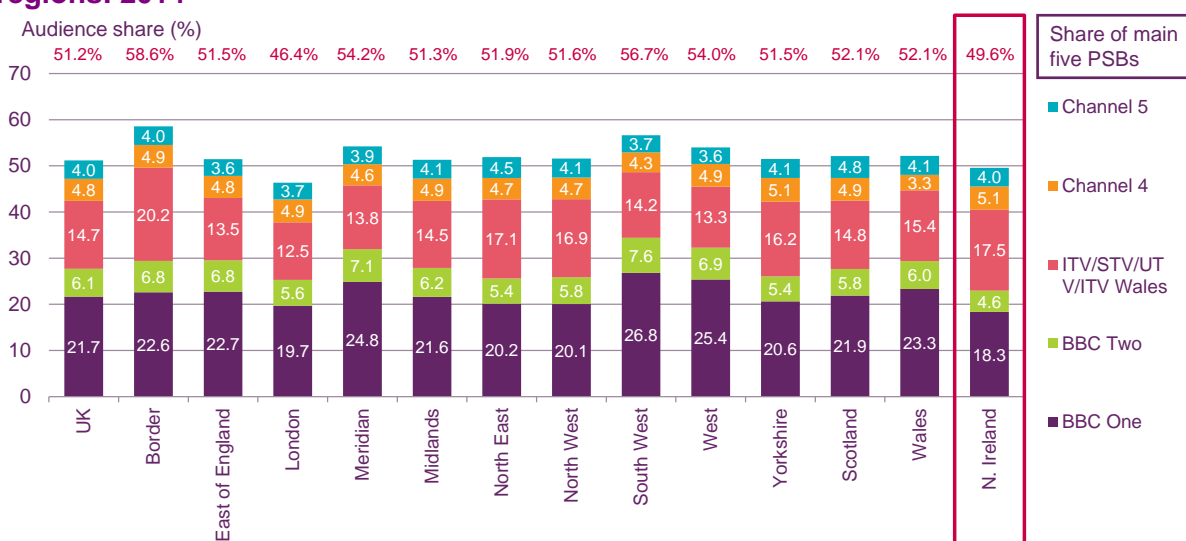
²⁰ PSB portfolio channels = BBC Three, BBC Four, BBC News, BBC Parliament, CBBC, CBeebies, BBC streaming channels, ITV+1 Network (incl ITV Breakfast), ITV2, ITV2+1, ITV3, ITV3+1, ITV4, ITV4+1, CITV, Channel 4+1, E4, E4 +1, More4, More4 +1, Film4, Film4+1, 4Music, 4seven, Channel 5+1, 5*, 5*+1, 5USA, 5USA+1. HD variants are included where applicable.

Just under half (49.6%) of all viewing is to the main five PSB channels

Northern Ireland was the only nation in which the share of viewing to the main five PSB channels fell below the majority of viewing. At 49.6%, viewing to the main five PSB channels in Northern Ireland was 1.6 percentage points less than the UK average, 51.2% (Figure 2.7).

Despite this, viewing share to the main five PSBs increased year on year in Northern Ireland, from 48.5% in 2013 to 49.6% in 2014. The gain was largely driven by an increase in share of viewing to BBC One, which rose by 1.5pp year on year. Nevertheless, viewing to BBC One had a lower share in Northern Ireland than in all the other UK nations and regions. Although UTV gained a smaller total share than BBC One in Northern Ireland, this was its second-highest performing area of the nations and regions in the UK, with 17.5% share (the highest was in Border, with a 20.2% share).

Figure 2.7 Share of the main five PSB channels in all homes, by UK nations and regions: 2014



Source: BARB, Individuals (4+). HD channel variants are included but not +1s.

Note: Chart shows figures rounded to one decimal place. Numbers may not appear to sum up to total share of main five PSBs due to rounding.

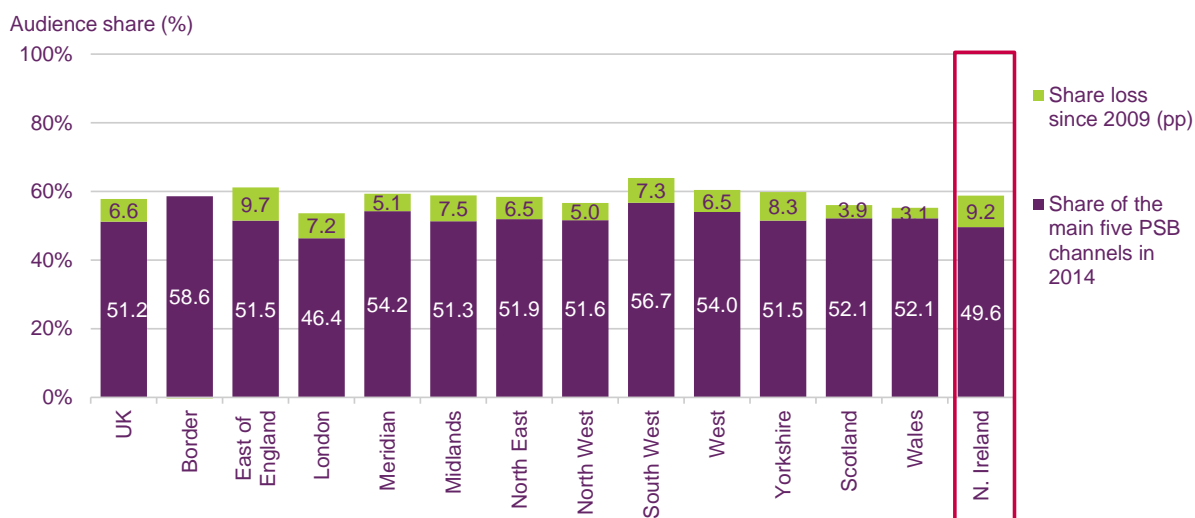
The combined share of the main five PSB channels has decreased by 9.2pp since 2009

As shown in Figure 2.8, in Northern Ireland between 2009 and 2014 there was a 9.2 percentage point reduction in the combined share of the main five PSB channels. Northern Ireland had the largest reduction in combined viewing share to the main five PSB channels, compared to all other UK nations. It also had the second largest reduction in combined viewing share to the main five PSB channels, compared to the English regions (the East of England had the largest decrease, at 9.7%).

From 2009 to 2014, all UK nations and regions except Border²¹ saw a reduction in the combined share of the main five PSB channels.

²¹ In Border, however, their combined share increased from 54.4% to 58.6%. This may be explained by the profile of the ITV Border region; it has the highest proportion of 65+ adults of all the BARB ITV regions and the highest proportion of 45+s overall (67%).

Figure 2.8 Reduction in combined share of the main five PSB channels, all homes: 2009 and 2014



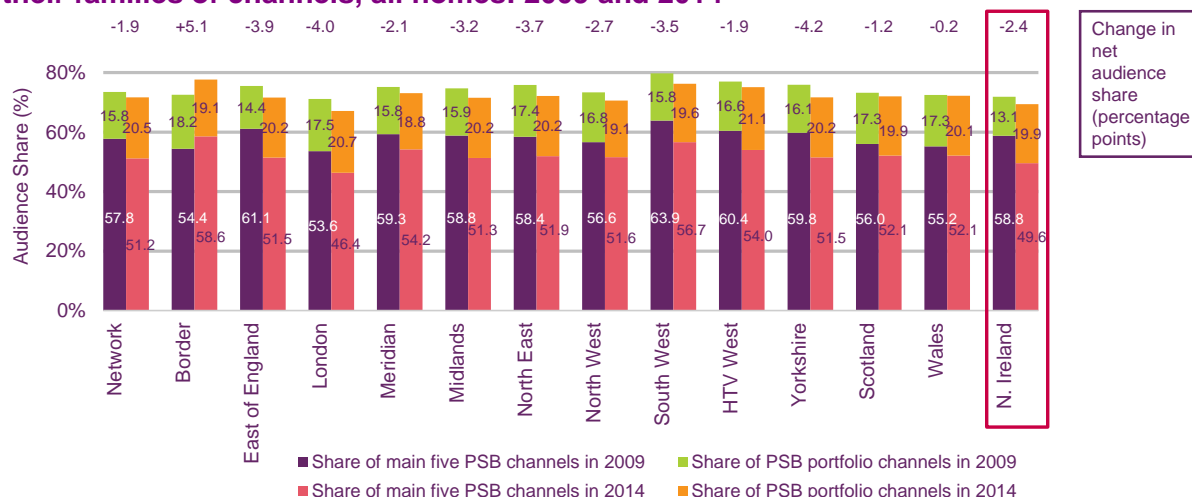
Source: BARB, Individuals (4+). HD channel variants are included but not +1s.

Notes: i) Following digital switchover in Wales in 2010 S4C ceased to carry Channel 4 content. S4C is therefore included in the main five PSB channels in 2009 but not in 2014. S4C's average share in Wales in 2014 is 1.8% 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 some caution.

The total share of the main five PSBs and their portfolio of channels decreased by 2.4pp between 2009 and 2014

Northern Ireland had the second-largest reduction of combined viewing share to the main five PSB channels (-9.2 pp) compared to other UK nations and regions. The PSB portfolio channels, on the other hand, had the largest increase in total share between 2009 and 2014 compared to other UK nations and regions; increasing by 6.8 percentage points. This resulted in a net share loss overall of 2.4 percentage points for the main five PSBs and their families of channels, slightly higher than the UK average net loss of 1.9pp (Figure 2.9).

Figure 2.9 Net change in the audience share of the main five PSB channels and their families of channels, all homes: 2009 and 2014



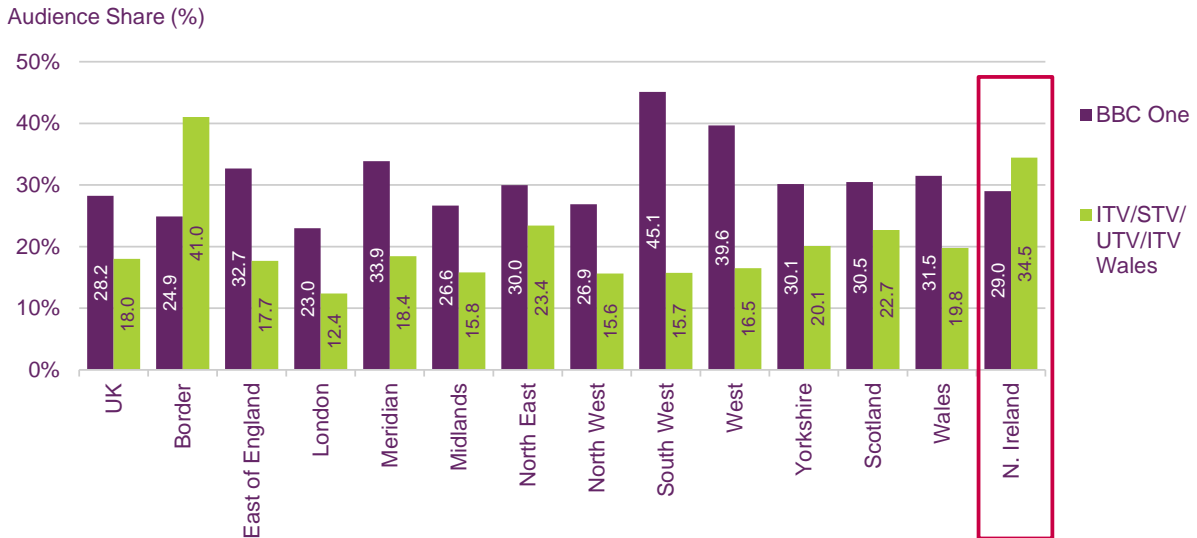
Source: BARB, Individuals (4+). Main five PSB channels = BBC One, BBC Two, ITV, Channel 4 and Channel 5, including HD variants but excluding +1s. PSB portfolio channels = BBC Three, BBC Four, BBC News, BBC Parliament, CBBC, CBeebies, BBC streaming channels, ITV+1 Network (incl TV Breakfast), ITV2, ITV2+1, ITV3, ITV3+1, ITV4, ITV4+1, CITV, Channel 4+1, E4, E4 +1, More4, More4 +1, Film4, Film4+1, 4Music, 4seven, Channel 5+1, 5*, 5*+1, 5USA, 5USA+1. HD variants are included where applicable.

Notes: i) Following digital switchover in Wales in 2010 S4C ceased to carry Channel 4 content. S4C is therefore included in the main five PSB channels in 2009 but not in 2014. S4C's average share in Wales in 2014 is 1.8% 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 some caution.

UTV's early-evening local news bulletin attracted a 34.5% share

As shown in Figure 2.10, UTV's early-evening news bulletin, (*UTV Live*) attracted a 34.5% average share in Northern Ireland between 6pm and 6.30pm, nearly double Channel 3's UK average for early-evening news bulletins (18.0%). This was markedly higher than in all other UK nations and regions, with the exception of Border, which achieved a 41.0% viewing share. BBC One's counterpart bulletin in Northern Ireland, *BBC Newsline*, attracted a lower average share (29.0%) between 6.30pm and 7pm, although this was a higher average than the BBC early evening news bulletin across the UK as a whole (28.2%).

Figure 2.10 BBC One and ITV/ STV/ UTV/ ITV Wales early evening news bulletin shares, all homes: 2014

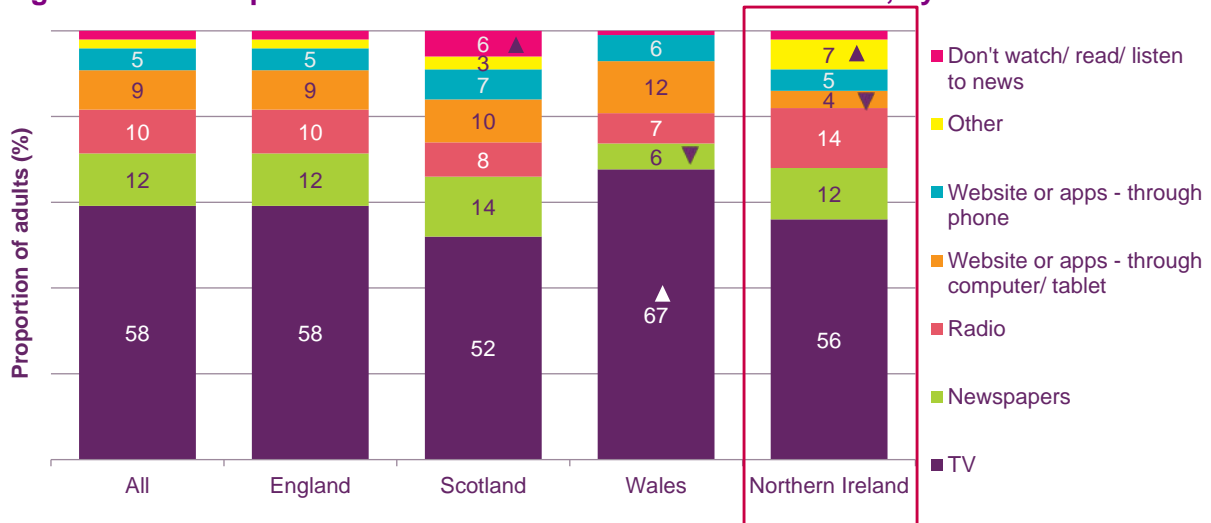


Source: BARB, Individuals (4+). BBC One includes HD variants. ITV excludes HD variants and +1. Note: Early evening ('local') news bulletin figures based on 'regional news' genre programmes, start time 17:55-18:35, 10mins+ duration, BBC One & ITV (exc HD), weekdays. UK figures based on share to early evening news bulletin day part. BBC One's early evening news bulletin is transmitted between 18:30 – 19:00 and ITV/STV/UTV/ITV Wales' is transmitted between 18:00 – 18:30.

Adults in Northern Ireland are less likely to use a website or app (either on a phone, tablet or computer) as their main source of UK and world news

In Northern Ireland in 2014, 9% of adults aged 16+ cited websites or apps as their main source of UK and world news, significantly lower than respondents in other UK nations, and lower than the UK as a whole (15%). Television was the most popular main source of news in Northern Ireland, with 56% of adults using the medium as their main source of UK and world news (Figure 2.11).

Figure 2.11 Respondents' main source of UK and world news, by nation: 2014



Source: Ofcom Media Tracker 2014. Base: All (2,074); England (1,577); Scotland (183); Wales (154); Northern Ireland (160). Significance testing (indicated by a triangle) shows any difference in the main source of news between any nation and all adults.

2.4 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 STV/ ITV/ UTV. The figures exclude Gaelic and Welsh-language programming but include 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.

Historical financial figures are presented in nominal terms and not adjusted for inflation. The reason for this is to align the CMR suite of reports and to provide a 'base' view of the overall market to inform further analysis.

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.

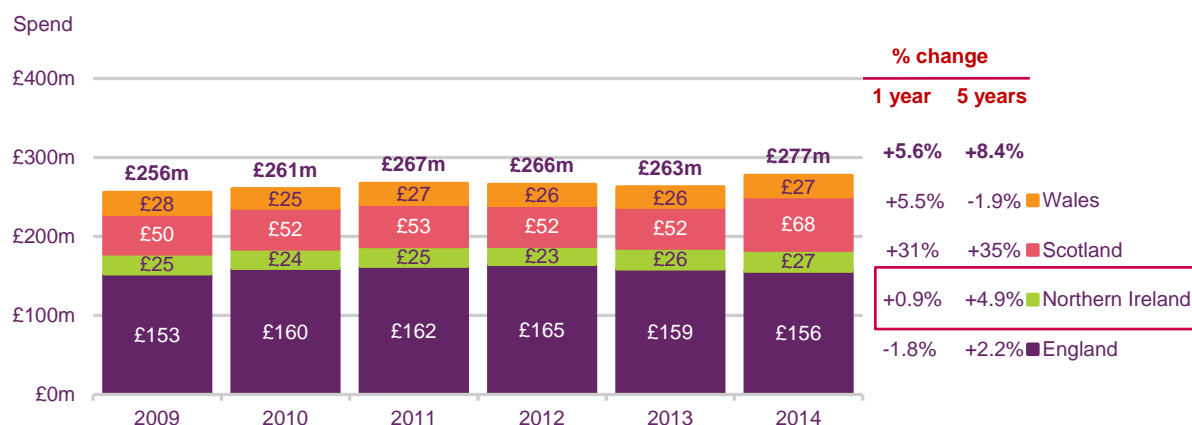
BBC and UTV spend on first-run originated content for viewers in Northern Ireland remained steady in 2014.

£277m 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 2014, up by £14m (or 5.6%) on 2013 and up by 8.4% since 2009 in nominal terms.

The majority of this increase was attributable to exceptional spending in Scotland relating to the Referendum on Scottish Independence and the Commonwealth Games, held in Glasgow during July and August.

In nominal terms, the year-on-year spend by the BBC and UTV on first-run originated programming for viewers remained broadly stable in Northern Ireland, increasing from £26.3m in 2013 to £26.6m in 2014, a rise of 0.9%, and increasing by 4.9% since 2009.

Figure 2.12 Spend on first-run originated nations' and regions' output by the BBC/ITV1/ STV/ UTV



Source: Broadcasters. All figures are nominal.

Note: Spend data for first-run originations only. Excludes spend on BBC Alba and S4C output but includes some spend on Irish-language programming by the BBC. These figures do not include spend on network content. Spend on programming for the ITV Border region is included under England. For information on Irish-language programming by the Irish Language Broadcast Fund (ILBF), please see Section 0.

Total spend on current affairs programming for people in Northern Ireland has increased by 28% year on year

With regard to spend for each nation, including acquisitions and repeats, the BBC and UTV spend on current affairs programming for viewers in Northern Ireland increased in nominal terms by 28% in 2014, a 43% rise on five years earlier. Spend on news also increased, with a 9% year-on-year increase. These increases were counterbalanced by a decrease in non-news programming spend, of 13% year on year; Derry~Londonderry was the UK's City of Culture for 2013 and as such there was special coverage of a number of events in that year.

Spend on programming commissioned for Northern Ireland as a whole has remained stable with no year-on-year change. This is in contrast to the rest of the UK, which saw an average 8% increase in spending on programmes produced for specific nations and regions, led in particular by the exceptional increase in Scottish spending.

Figure 2.13 Change in total spend on nations' and regions' output, by genre and nation: 2000 - 2014

	UK		England		N. Ireland		Scotland		Wales	
	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)
Current Affairs	22%	21%	10%	-1%	28%	43%	49%	61%	16%	29%
News	5%	6%	2%	4%	9%	8%	24%	17%	15%	30%
Non-news/non-current affairs	11%	11%	-2%	119%	-13%	-7%	27%	33%	-2%	-23%
Total Spend in 2014	£285m		£163m		£27m		£69m		£27m	
	UK		England		N. Ireland		Scotland		Wales	
	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr
Change in Spend	8%	9%	2%	4%	0%	5%	29%	32%	6%	-3%

Source: Broadcasters. All figures are nominal.

Note: Excludes spend on BBC Alba and S4C output but includes some spend on Irish-language programming by the BBC. These figures do not include spend on network content. Spend on programming for the ITV Border region is included under England.

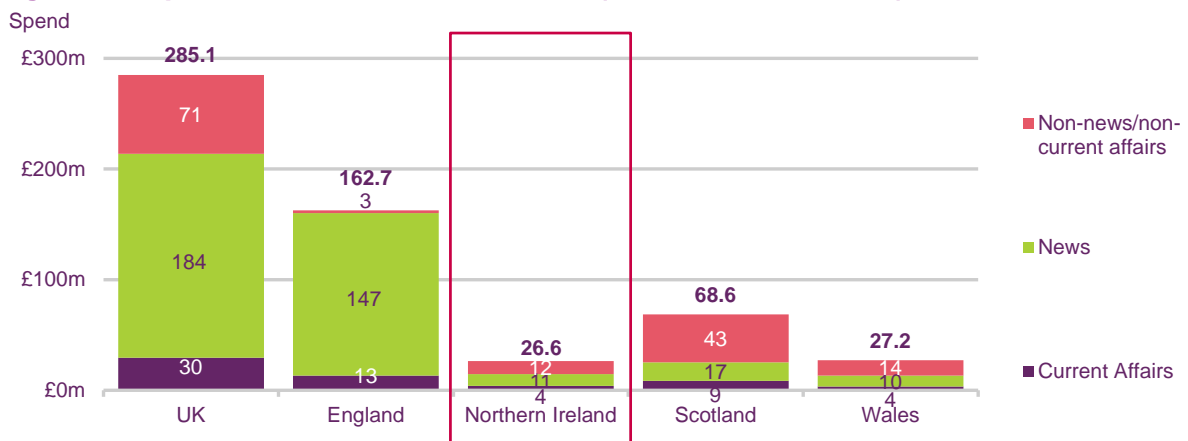
Expenditure by the BBC and UTV on non-network programming for viewers in Northern Ireland remained stable year on year

Expenditure on non-network content broadcast by the BBC and UTV for people in Northern Ireland remained broadly stable at £26.6m in 2014. Compared to 2013, there was a £2m decrease in spending on non-news/ non-current affairs programming and a £1m increase in spend on both news and current affairs.

In addition to this, according to its Annual Report for financial year 2014/2015, the BBC contributed £76m to the operational costs of S4C in Wales. It incurred a further £24.5m of costs in delivering other content to S4C under the terms of the operating agreement²², and contributed £5.0m to BBC Alba in Scotland.

²² http://www.s4c.co.uk/production/downloads/e_cytundeb-gweithredu-s4c-bbc.pdf

Figure 2.14 Total spend by the BBC/ ITV1/ STV/ UTV on non-network nations'/ regions' output for the main PSB channels (BBC1 and Channel 3)



Source: Broadcasters. All figures are nominal.

Note: Excludes spend on BBC Alba and S4C output but includes some spend on Irish-language programming by the BBC. These figures do not include spend on network content. Spend on programming for the ITV Border region is included under England.

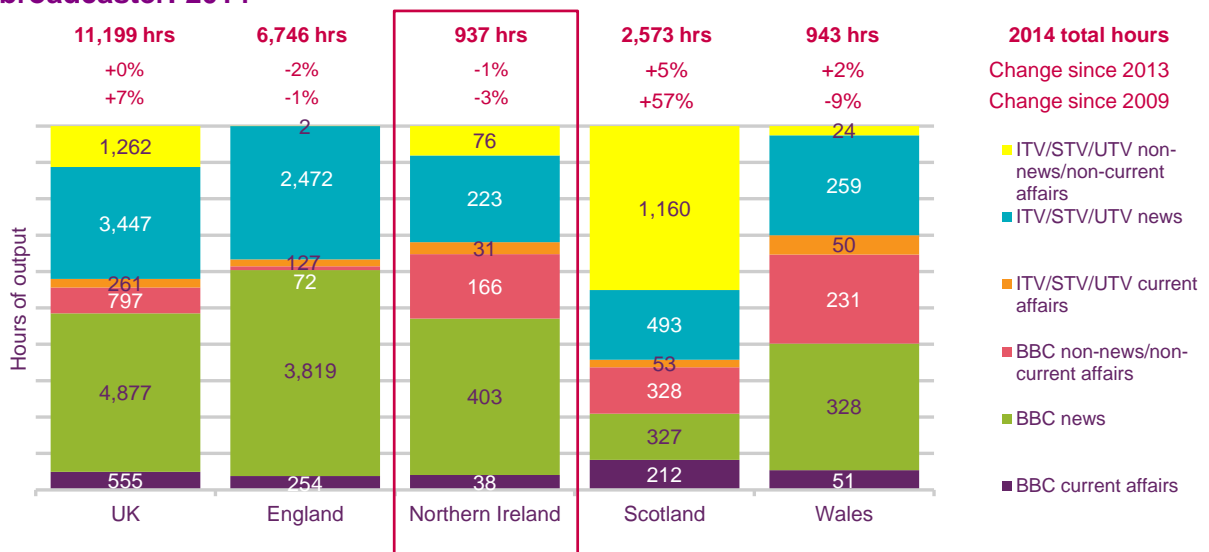
The number of first-run originated hours for viewers in Northern Ireland decreased by 1% year on year in 2014

The BBC and ITV1/ STV/ UTV produced a total of 11,199 hours of first-run originated content for the English regions, Scotland, Wales and Northern Ireland in 2014, down by just 33 hours on 2013, and up by 7.3% (760 hours) since 2009.

The number of first-run originated hours produced specifically for viewers in Northern Ireland has decreased by 3% since 2008 (or by 32 hours). Over the past year, the number of first-run hours has decreased by 1%, compared to the UK-wide average which has remained broadly stable.

The distribution of programmes across genres and broadcasters in Northern Ireland remained broadly the same as in 2013. The largest change was a reduction of 34 hours of non-news/ non-current affairs programming by the BBC.

Figure 2.15 Hours of first-run originated nations'/ regions' output, by genre and broadcaster: 2014



Source: Broadcasters.

Note: Hours data for first-run originations only. Excludes hours for BBC Alba and S4C output but includes some hours of Irish-language programming by the BBC. These figures do not include hours of network content. Hours broadcast in the ITV Border region are included under England.

Total cost per hour of nations' output is up 13% since 2009 in Northern Ireland in nominal terms

Analysing the cost of making programmes for the nations, cost-per-hour calculations show that Northern Ireland costs, when measured in nominal terms, increased over the five-year period to 2014 by 13%, in contrast to the UK average, which increased by 5%.

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



Source: Broadcasters. All figures are nominal

Note: Excludes spend on BBC Alba and S4C output but includes some spend on Irish-language programming by the BBC. These figures do not include spend on network content. Spend on programming for the ITV Border region is included under England.

2.5 PSB television quota compliance

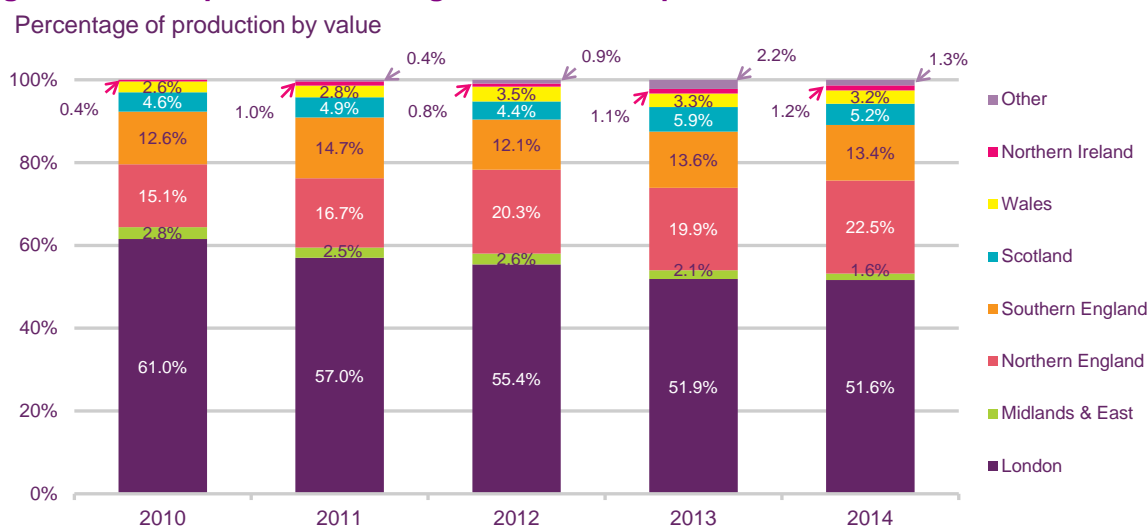
Northern Ireland's share of total spend on original network productions remained steady in 2014.

Figure 2.17 illustrates the distribution of spend on qualifying first-run commissioned network programming by the five main PSB channels in the five years to 2014. As in previous years, the majority was spent within the M25: 51.6%, down from 51.9% in 2013. A further 22.5% of first-run spending was captured by producers based in the north of England, and 13.4% in southern England.

In 2014 the proportion of spending on originated network productions outside London increased for the fourth year in a row. In contrast, London spending continued a downward trend, falling by 0.3pp. This shift may be attributable in some part to the BBC relocating a significant production base, including the majority of BBC Sport, to Salford, and a lack of London-based events programming on the scale of the royal wedding or the London 2012 Olympics to act as a counterweight in 2014.

In Northern Ireland the share of total spend increased marginally to 1.2% from 1.1% in the previous year. While Northern Ireland remains the nation with the lowest spend, the proportion of overall spend within the nation has tripled from 0.4% in 2010.

Figure 2.17 Expenditure on originated network productions: 2010-2014



Source: Ofcom/broadcasters

Note: This expenditure does not include network news production²³. The category 'other' refers to programmes made by producers based within the M25, which qualify as regional productions on the grounds that 70% of total spend and 50% of offscreen talent spend was outside the M25, but not all in one macro-region, and therefore cannot be attributed to a single region.

The proportion of originated network production hours produced in Northern Ireland remained steady in 2014

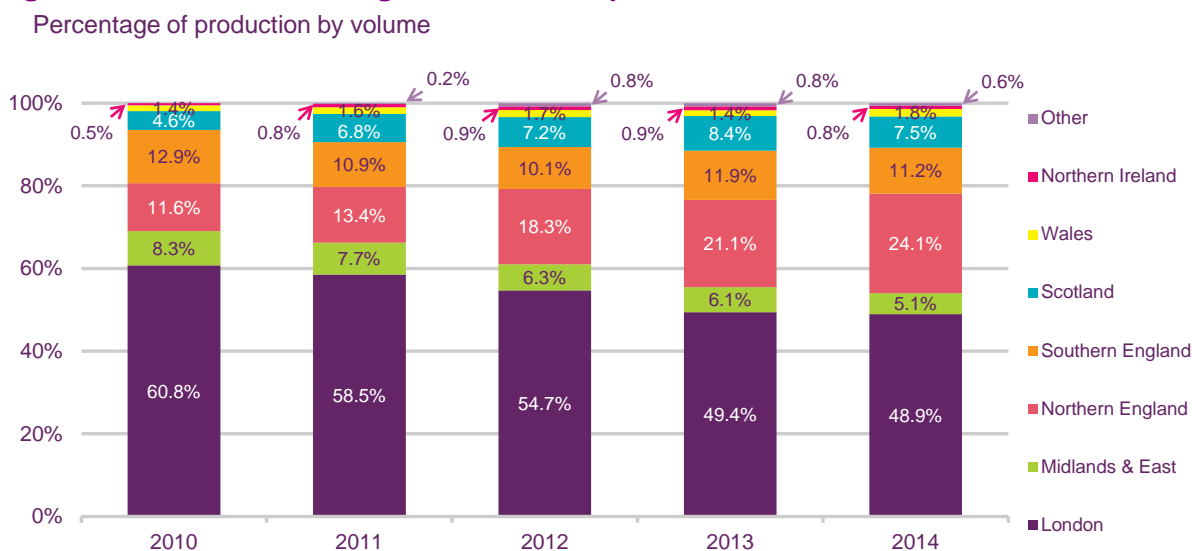
In terms of volume of hours, in 2014 for the second year running, less than half (48.9%) of first-run network programmes were produced within the M25, down from 60.8% in 2010. A further 24.1% were produced in northern England, up from 21.1% in 2013, 11.2% in southern England and 7.5% in Scotland. The greater rise in volume produced outside

²³ See http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg_prod/ on Ofcom website for further details

London, when compared to spend, is in part attributable to the lower production costs in regions outside the capital.

The proportion of first-run hours produced in Northern Ireland dropped slightly, to 0.8%, in 2014. Despite this, spend on first-run originations has increased (Figure 2.17), resulting in a greater spend per hour of production (Figure 2.16).

Figure 2.18 Volume of originated network productions: 2010-2014



Source: Ofcom/ broadcasters

Note: These hours do not include network news production²⁴. The category 'other' refers to programmes made by producers based within the M25 which qualify as regional productions, on the grounds that 70% of total spend and 50% of off-screen talent spend was outside the M25, but not all in one macro-region, and therefore cannot be attributed to a single region.

2.6 Viewing to Republic of Ireland channels

RTÉ One and RTÉ2 are the most-watched Republic of Ireland-originated TV channels in Northern Ireland

Before digital switchover in October 2012, RTÉ One and RTÉ2, TG4 (Irish language channel), and TV3 were available to around 56% of the Northern Ireland population via overspill from TV transmitters in the Republic of Ireland (RoI). Since 2005, TG4 has also broadcast in the Belfast area from the Divis transmitter.

Since digital switchover, RTÉ One and RTÉ2, and TG4, are also broadcast from three transmitters in Northern Ireland – Brougher Mountain, Black Mountain and Carnmoney Hill. Added to the existing overspill coverage, this has significantly increased the free-to-view availability of these channels to around 94% of the population.

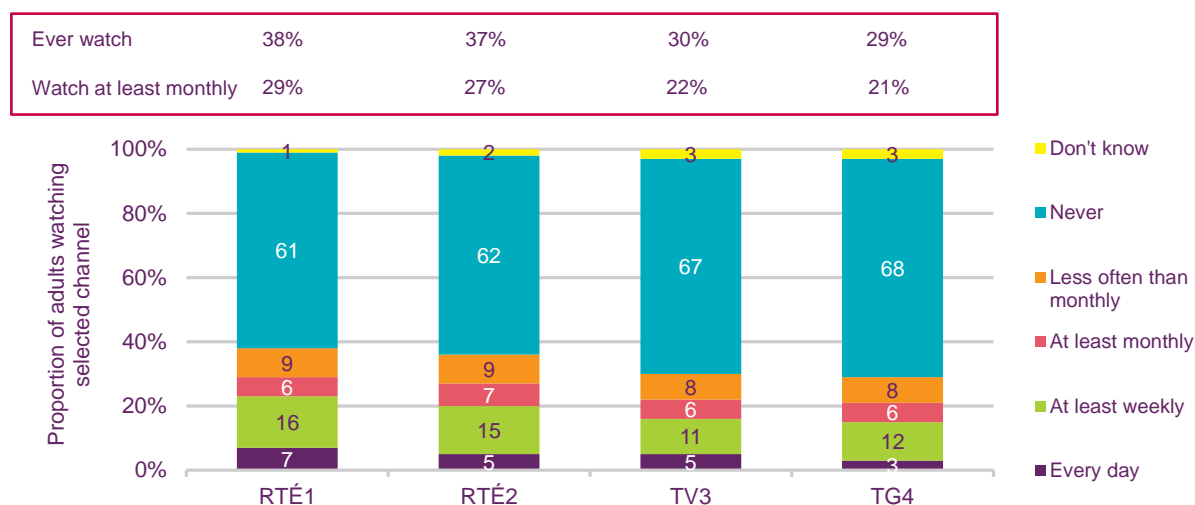
In addition, the RTÉ services and TG4 are available on Sky and Virgin Media. TV3 is still available only via overspill.

Just under one in three respondents (29% and 28% respectively) in Northern Ireland with a TV in their household claimed to watch RTÉ One and RTÉ2 on at least a monthly basis in

²⁴ See http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg_prod/ on the Ofcom website for further details.

Q1 2015 (Figure 2.19). This compares to around one in five respondents who claimed to watch TV3 and TG4 on at least a monthly basis (22% and 21% respectively).

Figure 2.19 Claimed viewing of ROI-originated channels in Northern Ireland



Source: Ofcom Technology Tracker, wave 1 2015

Base: All adults aged 16+ in Northern Ireland with a TV in the household (n = 462)

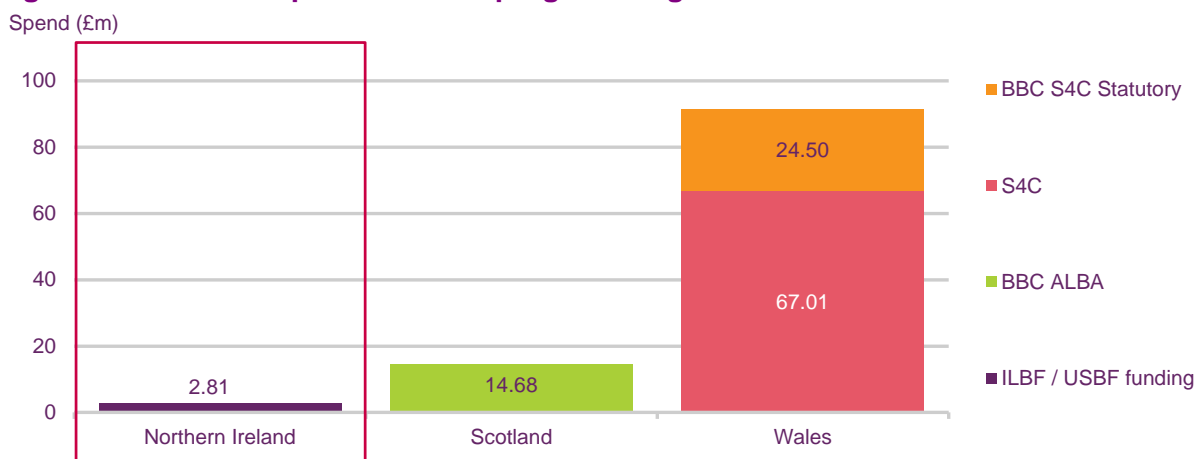
QH65A-D. How frequently, if at all, do you watch each of these channels?

2.7 Other programming in Northern Ireland

Together, the Irish Language Broadcast Fund (ILBF) and the Ulster Scots Broadcast Fund (USBF) contributed £2.8m to programmes broadcast in Northern Ireland in 2014

On top of the BBC and UTV's contribution to local-interest programming, already mentioned in previous sections, the ILBF contributed £2.06m and the USBF contributed £0.74m to the cost of Irish-language and Ulster-Scots cultural programming broadcast on BBC NI, UTV, TG4, and RTÉ.

Figure 2.20 Other spend on other programming in the devolved nations: 2014



Source: Broadcasters.

Note: BBC S4C Statutory refers to the cost to the BBC of programming supplied to S4C by the BBC as part of their statutory agreement. ILBF/ USBF refers to additional production contributions by the Irish Language Broadcast Fund and the Ulster Scots Broadcast Fund. BBC S4C Statutory and S4C figures cover the 2014/15 financial year, ILBF/ USBF and BBC Alba figures cover the 2014 calendar year.

The Irish Language Broadcast Fund

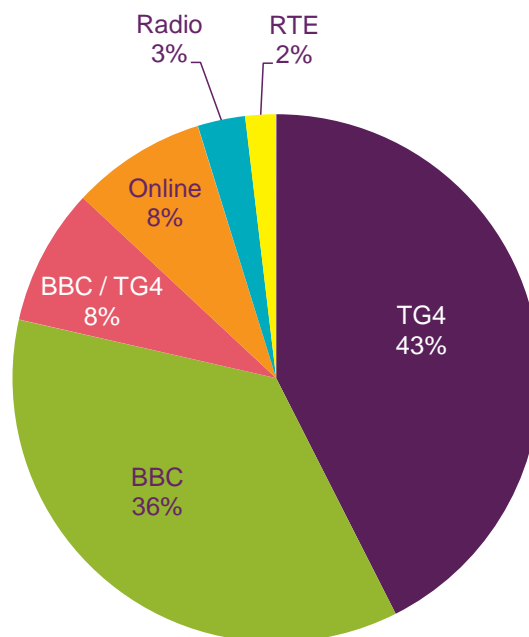
The Irish Language Broadcast Fund (ILBF) was launched in 2005. Funding comes from the UK Government's Department of Culture, Media & Sport through the British Film Institute to Northern Ireland Screen, which manages the fund.

The first period of funding ran from 2005-2009 (£3m per year). It was renewed in 2009, running until 2011, and again in 2013 for the period to 2015.

It was announced in the Chancellor's 2013 Autumn Statement that funding would be extended for a further year, to 2016.

The ILBF supports a minimum of 55 hours of Irish language content every year, the majority of which is broadcast on TG4 and BBC NI.

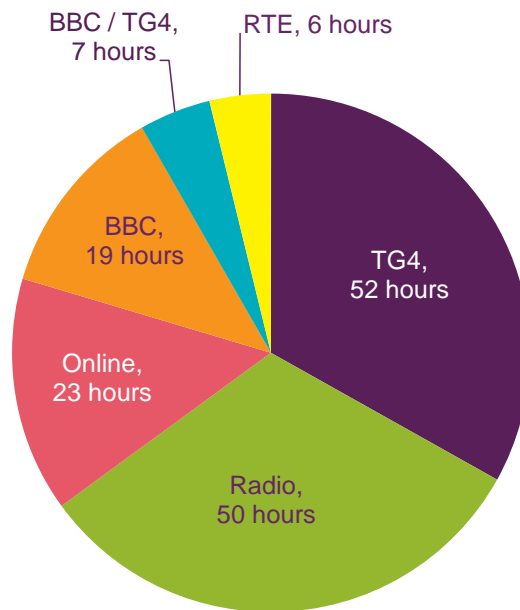
Figure 2.21 ILBF content funding recipients, by broadcaster / platform: 2014/2015



Source: Northern Ireland Screen

The ILBF also supports online content, mobile phone applications and, through a training programme, content on Raidió Fáilte. Over £2.5m is spent annually on Irish-language content and in the last financial year there were 14 recipients of funding (television production companies and Raidió Fáilte). To secure funding, companies must be based in Northern Ireland and have a commitment from a broadcaster to show output.

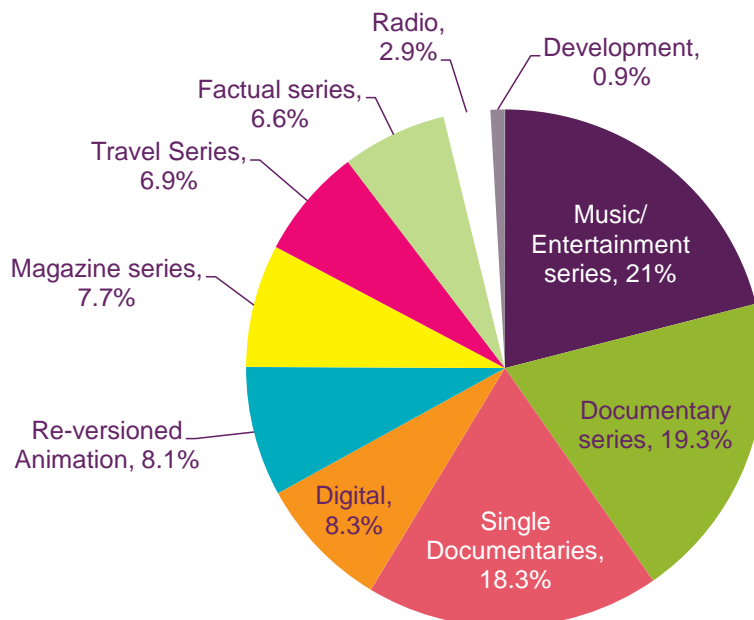
Figure 2.22 ILBF-funded hours: 2014/2015



Source: Northern Ireland Screen

Since the fund was started, the minimum language content in programming has risen from 60% to 75%. Funding is allocated to a range of genres including children’s, documentary, entertainment, drama, radio and digital media.

Figure 2.23 ILBF content funding, by genre: 2014/2015



Source: Northern Ireland Screen. Includes all programmes

Programming highlights

ILBF-funded feature film *An Bronntanas*, or *The Gift*, received the jury’s special award at the 2015 Boston Irish Film Festival. The Irish Film & Television Academy (IFTA) also submitted *An Bronntanas* as Ireland’s entry for the Foreign Language category at the 87th Academy Awards.

ILBF objectives for 2015/16 include:

- To deliver at least 55 additional hours of Irish language content across a range of genres to reach a weekly audience of 25,000.
- To ensure a minimum language level of 75% with emphasis on the Ulster dialect.
- To ensure maximum use of Irish-speaking cast and crew on each production.

About the Ulster-Scots Broadcast Fund

The Ulster-Scots Broadcast Fund (USBF) was established to provide finance for the production of film, television and other moving-image products on the Ulster-Scots heritage, culture and language in Northern Ireland.

Funding was secured in 2010, with the USBF making its first awards in March 2011.

As with the ILBF, funding comes from the UK Department for Culture, Media & Sport through the British Film Institute to Northern Ireland Screen, which manages the fund.

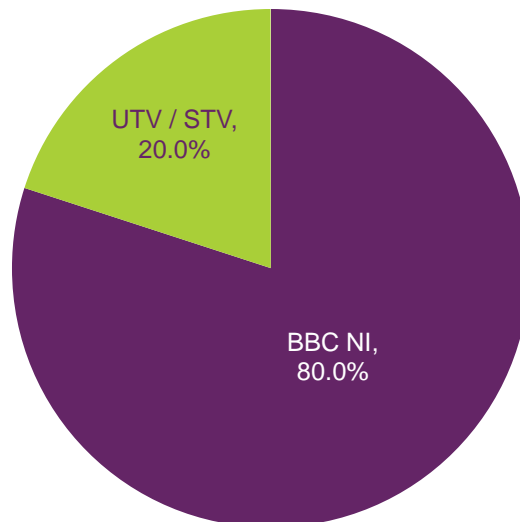
The UK government has given a commitment to the fund (£1m per year) until at least 2016.

The majority of programming funded by the Ulster-Scots broadcasting fund was aired on BBC Northern Ireland in 2014/15

In 2014/15 eight awards were made, totalling ten hours of production.

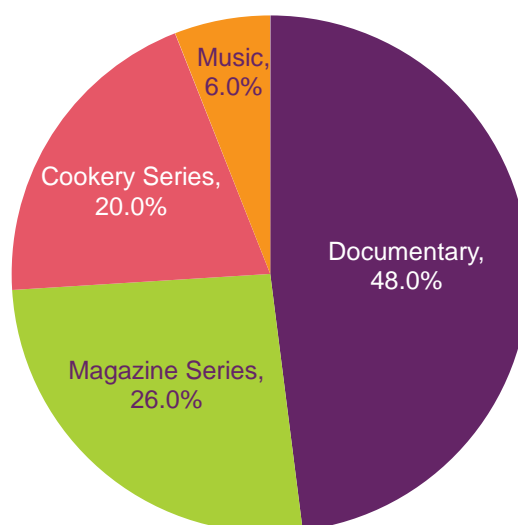
Seven projects were broadcast in 2014/15 including documentaries, music, cookery and a magazine series. Funded content was broadcast on BBC Northern Ireland, UTV and STV.

Figure 2.24 USBF content funding, by broadcaster: 2014-2015



Source: Northern Ireland Screen, includes all programmes

Figure 2.25 USBF breakdown of output, by genre: 2014-2015



Source: Northern Ireland Screen, includes all programmes

Programming highlights

The three-part landmark documentary series *Imagining Ulster* examined the historical, emotional and cultural bonds which underpin the shaping of the Ulster-Scots identity.

Paul and Nick's Big Food Trip returned for a third series and was broadcast in Northern Ireland on UTV and in Scotland on STV.

Four-part documentary travelogue series *Brave New World: New Zealand* explored the story of 19th Century Ulster- Scots emigration to New Zealand. A follow-up series, *Brave New World: Canada* was commissioned in 2014-15.

Objectives for 2015/16 include:

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

Programming reach

During 2014/15, programming supported by the ILBF and USBF, and broadcast by BBC Northern Ireland, reached an audience of 600,000, representing around 35% of the total Northern Ireland population.

3 Radio and audio content

3.1 Recent developments in Northern Ireland

DAB coverage in Northern Ireland is increasing

DAB coverage across the UK is set to be expanded after an agreement between industry and the Government. The agreement will see coverage of the Northern Ireland local DAB multiplex increase from 79% of households and 81% of roads to 86% of households and 89% of roads. The improvements are due to be completed by Q2 2016.

The local DAB multiplex in Northern Ireland carries Cool FM, Downtown, Downtown Country, Citybeat, BBC Radio Ulster and BBC Radio Foyle (from May 2015).

The expansion of local DAB coverage is separate to the ongoing BBC drive to boost its national DAB radio coverage by the end of this year, and other plans to increase capacity and coverage for national commercial radio on DAB.

A second national commercial digital radio multiplex that will deliver 14 digital stations (nine of which are new) to listeners across the UK is to launch next year. The new digital radio multiplex will be run by Sound Digital, a consortium of Arqiva, Bauer, and UTV Media GB.

The multiplex (which is the transmission infrastructure used to deliver these services) will carry new services including Jazz FM, Magic Mellow, and British Muslim Radio.

The service will also carry new UTV Media-owned-and-run services: talkRADIO, talkSPORT 2, and talkBUSINESS. UTV will also return Virgin Radio to the airwaves, having signed a 12-year licensing agreement with the Virgin Group.

Coverage from the new multiplex will be more limited than others: BBC National; Digital One; and local DAB. UK-wide indoor coverage will reach 72% of the population. In Northern Ireland, the figure will be 62%, possibly increasing to 66%, subject to international agreement.

Northern Ireland now has its own local DAB-only service

Downtown Country, a new digital-only Country and Western station, started broadcasting in Northern Ireland in April 2015. The spin-off station from Bauer NI-owned Downtown Radio is the region's first digital-only station, broadcasting on DAB and online.

Consolidation in the Northern Ireland radio sector

The Q Radio Network, which operates six small stations across Northern Ireland, has bought Belfast-based Citybeat. The takeover means there are now three main commercial radio players in the Northern Ireland market: Bauer NI (Cool FM, Downtown, and Downtown Country); U105 (owned by UTV Media); and the Q Network.

New community radio stations go live

Three new community radio stations have gone on air in Northern Ireland, joining 11 existing stations. They are:

- Belfast FM - targeted at listeners over 55 in the Belfast City area

- ABC FM – aimed at listeners in the Portadown area; and
- fUSE FM – which will reflect Ulster-Scots language and culture, and broadcasting in the Ballymoney area.

Two other licences were awarded as part of the same round of Community Radio licensing. Chainé FM (Larne) and Raidió G (Maghera) decided not to take up the licences offered.

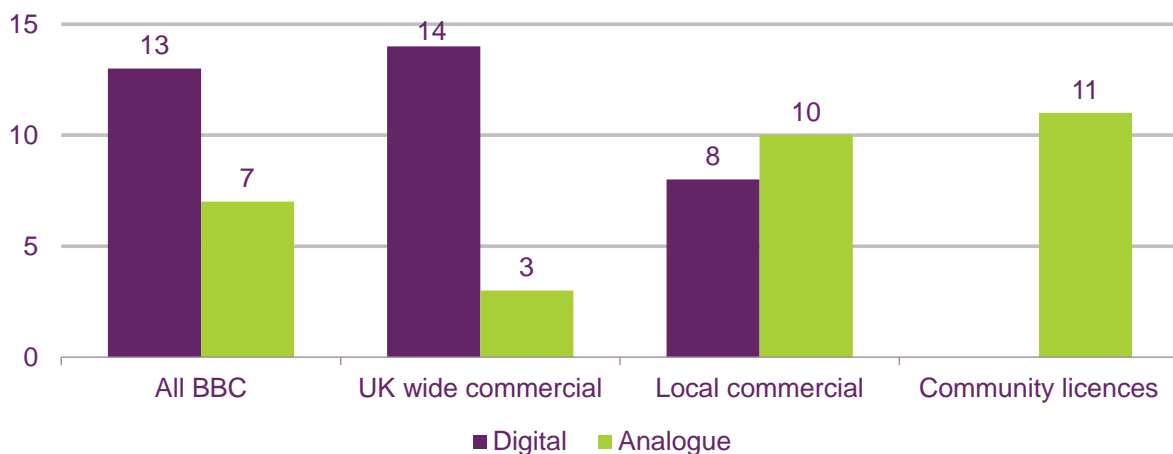
3.2 Radio station availability

There are 35 DAB digital radio stations in Northern Ireland

Listeners in Northern Ireland have access to 35 stations broadcasting on DAB. This includes 13 BBC digital stations, 14 UK-wide commercial stations broadcasting on the Digital One multiplex and eight stations on the local commercial multiplex.

The number of stations available on the local commercial multiplex has increased with the addition of some of Bauer and Absolute’s existing digital-only brands, and the launch of a new digital-only station, Downtown Country.

Figure 3.1 Radio station availability



Source: Ofcom, May 2015

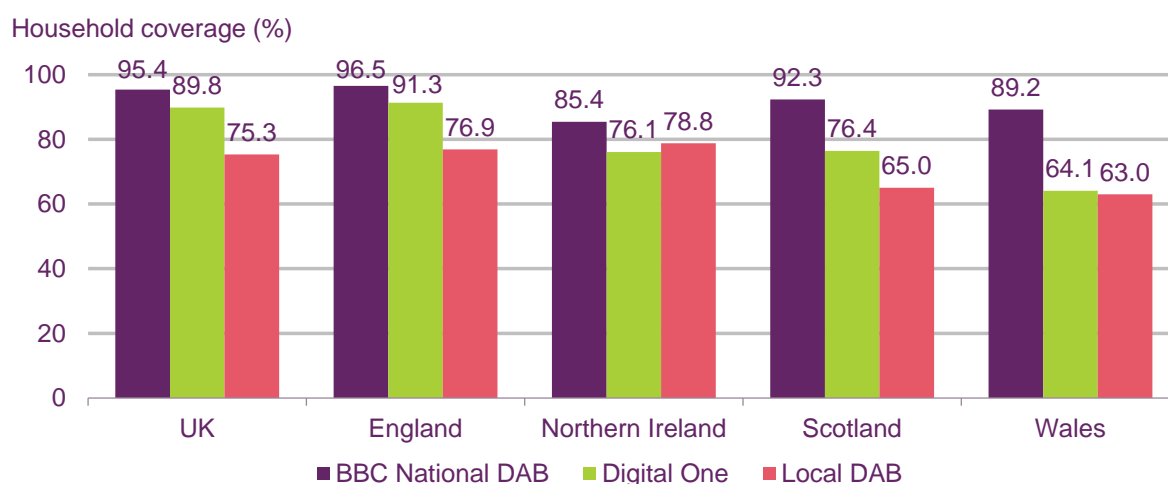
Note: This chart shows the maximum number of stations available; local variations and reception issues mean that listeners may not be able to access all of them.

3.3 DAB coverage

Local DAB services are available to 78.8% of households

The local DAB multiplex for Northern Ireland covers 78.8% of households (Figure 3.2) and 80.7% of major roads. The BBC’s network services broadcast on DAB are available to 85.4% of households and the UK-wide multiplex Digital One reaches 76.1% of households, an increase of 2.3pp year on year.

Figure 3.2 Household coverage of DAB



Source: BBC, Arqiva, Ofcom, June 2015
 Note: BBC figures indicate coverage at the end of 2014

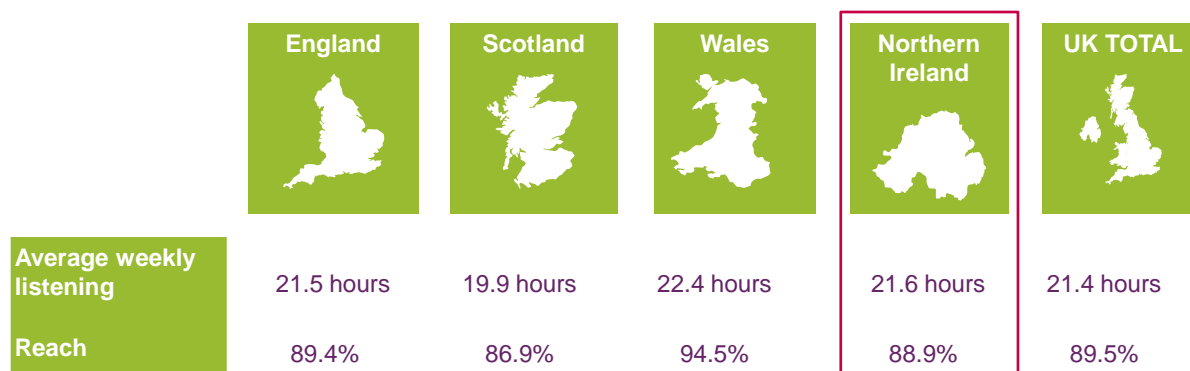
3.4 Patterns of listening to audio content

The time spent listening to radio in Northern Ireland is higher than in the UK as a whole

Radio listeners in Northern Ireland listened to radio for an average of 21.6 hours each week in 2014. Although this is lower than in Wales (22.4 hours), it is higher than in England and Scotland (21.5 and 19.9 hours respectively) and the UK average (21.4 hours).

Although the amount of time spent listening in Northern Ireland is among the highest, the proportion of the adult population who listen in an average week is lower. During an average week in 2014, radio services reached 88.9% of adults in Northern Ireland (Figure 3.3). This is 2.0pp higher than reach in Scotland, but lower than the reach in England and Wales (89.4% and 94.5% respectively) and the UK average (89.5%).

Figure 3.3 Average weekly reach and listening hours: 2014



Source: RAJAR, All adults (15+), year ended Q4 2014. Reach is defined as a percentage of the area's adult population who listen to a station for at least five minutes in the course of an average week.

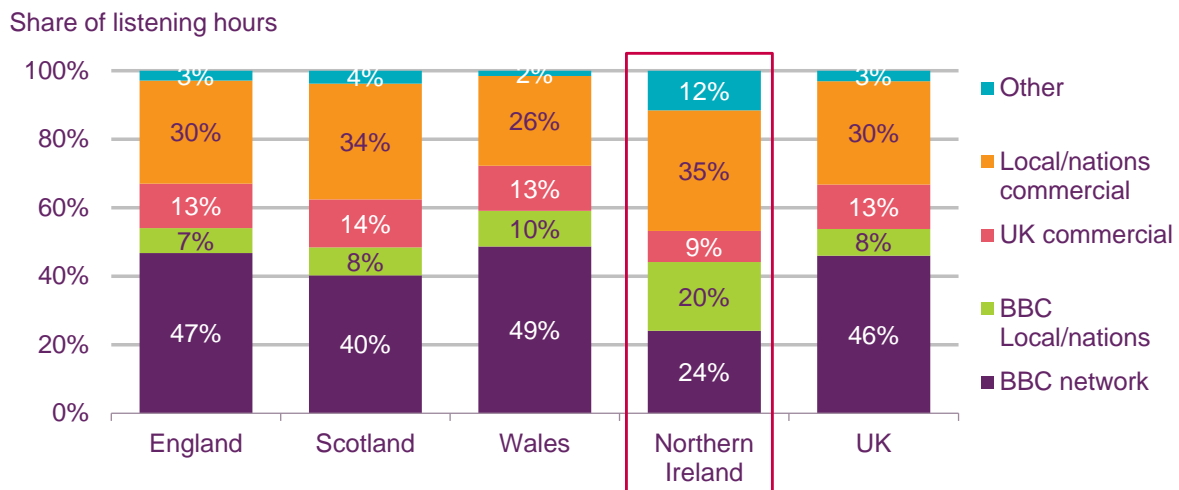
Local commercial radio is the most listened-to type of radio in Northern Ireland

The share of listening hours to local and nations' services in Northern Ireland is far higher than in any other part of the UK. Local commercial and BBC local and nations' services together accounted for 55% of total listening hours in 2014. The majority of this listening was to local commercial stations, with a 35% share of total listening hours. This is 5pp higher than the UK average, and higher than in any other nation.

The high share accounted for by local commercial stations means that total listening hours for the commercial sector as a whole is also high in Northern Ireland. In 2014, 44% of listening was to commercial stations, second only to Scotland, where 48% of listening was to commercial stations.

Share of listening to BBC local/nations' services accounted for a fifth of all listening in Northern Ireland (Figure 3.4). This was higher than any of the other nations and was 12pp above the UK average (8%). Northern Ireland had by far the lowest share of listening to BBC network services, with a share of 24% compared to the 46% UK average.

Figure 3.4 Share of listening hours by nation: 2014



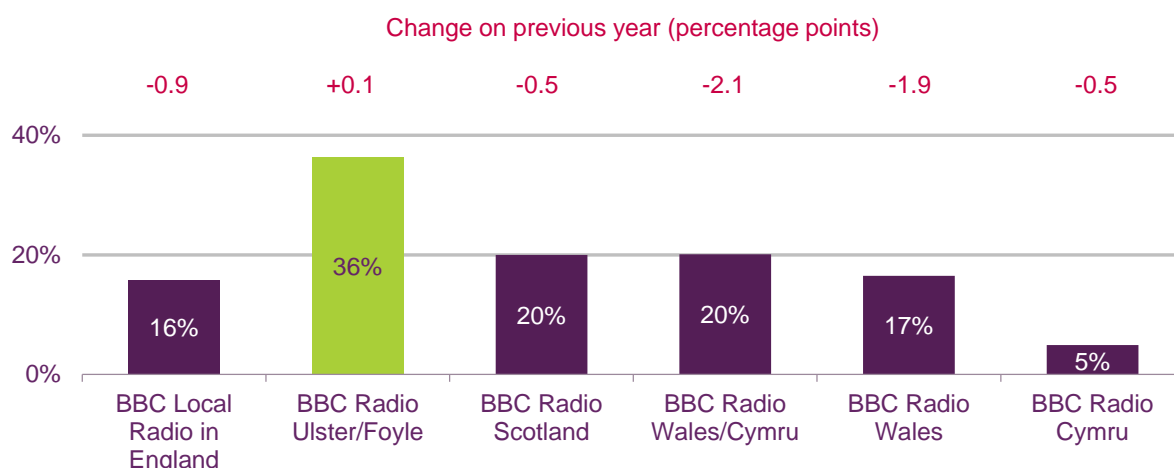
Source: RAJAR, All adults (15+), year ended Q4 2014.

Northern Ireland has the highest reach for a BBC national service

In an average week in 2014, weekly reach of BBC Radio Ulster stood at 36% (Figure 3.5). This is by far the highest weekly reach of any other BBC nations' service and higher than the aggregated reach of the BBC local radio stations in England. The high reach to this service is reflected in the BBC local/nations' services also having the largest share of listening hours in Northern Ireland when compared to any other nation. (Figure 3.4)

BBC Radio Ulster was also the only national BBC nations' service which did not see a fall in reach; all other respective BBC nations/local services saw a decrease in their average weekly reach.

Figure 3.5 Weekly reach for nations'/local BBC services: 2014



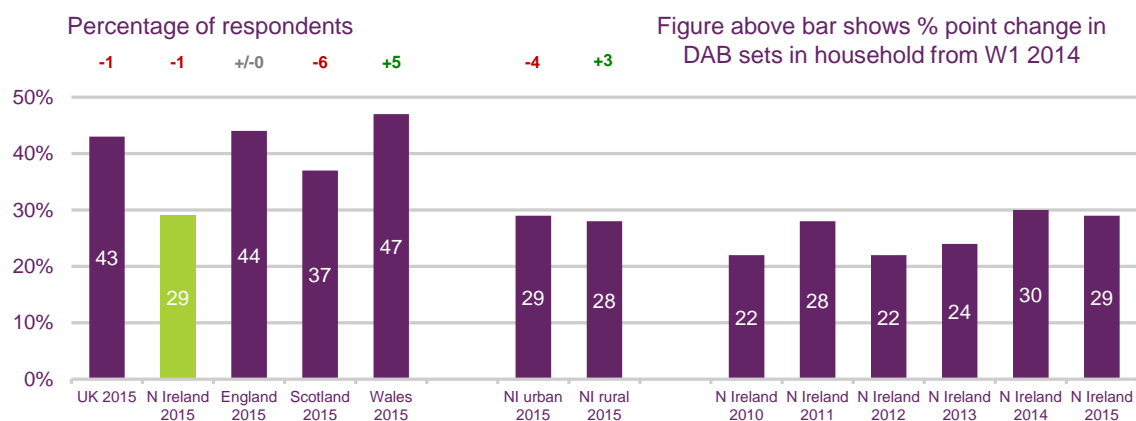
Source: RAJAR, All adults (15+), year ended Q4 2014

3.5 Digital radio set ownership and listening

Ownership of DAB digital radio sets is lower in Northern Ireland than in the UK as a whole

Twenty nine per cent of adults in Northern Ireland who listen to radio say they have at least one DAB radio set at home, broadly in line with 2014. Ownership of DAB digital radios in Northern Ireland remains lower than the UK average (43%). Ownership of DAB digital radios does not differ between radio listeners in urban and rural areas.

Figure 3.6 Ownership of DAB digital radios



Source: Ofcom Technology Tracker, wave 1 2015

QP9. How many DAB sets do you have in your household?

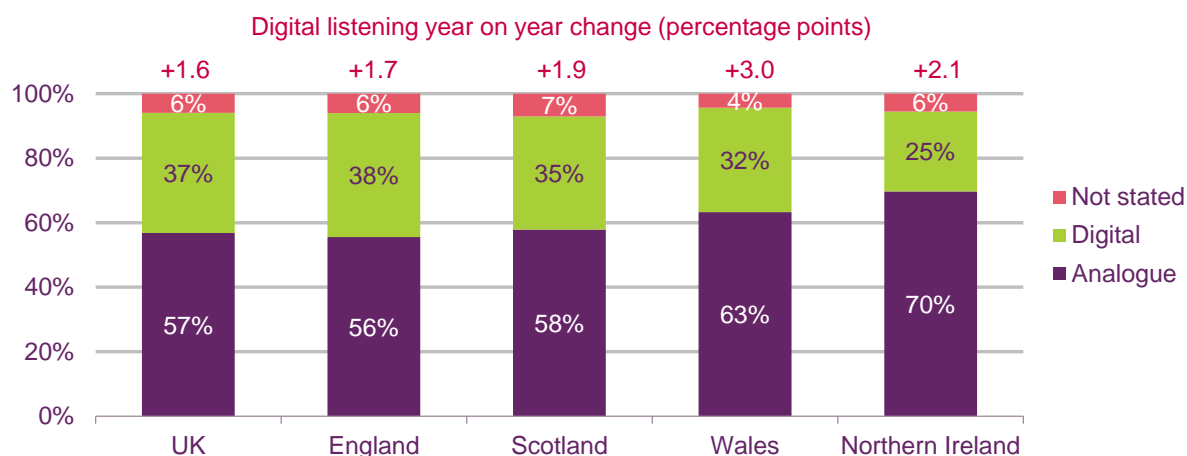
Base: Adults aged 16+ who listen to radio (n = 2934 UK, 406 Wales, 1735 England, 386 Scotland, 407 Northern Ireland, 205 Wales urban, 201 Wales rural, 854 Wales 2010, 397 Wales 2011, 405 Wales 2012, 383 Wales 2013, 403 Wales 2014, 406 Wales 2015)

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

Analogue listening still accounts for seven in ten listening hours in Northern Ireland

A quarter of all listening hours in Northern Ireland were via digital platforms in 2014, a year-on-year increase of 2.1pp (Figure 3.8). But this is still a lower share accounted for by digital listening than in any other nation, and is 12pp below the UK average (37%). Analogue remains the most popular platform for radio listening in Northern Ireland, with a 70% share of listening hours. The UK average is 57%.

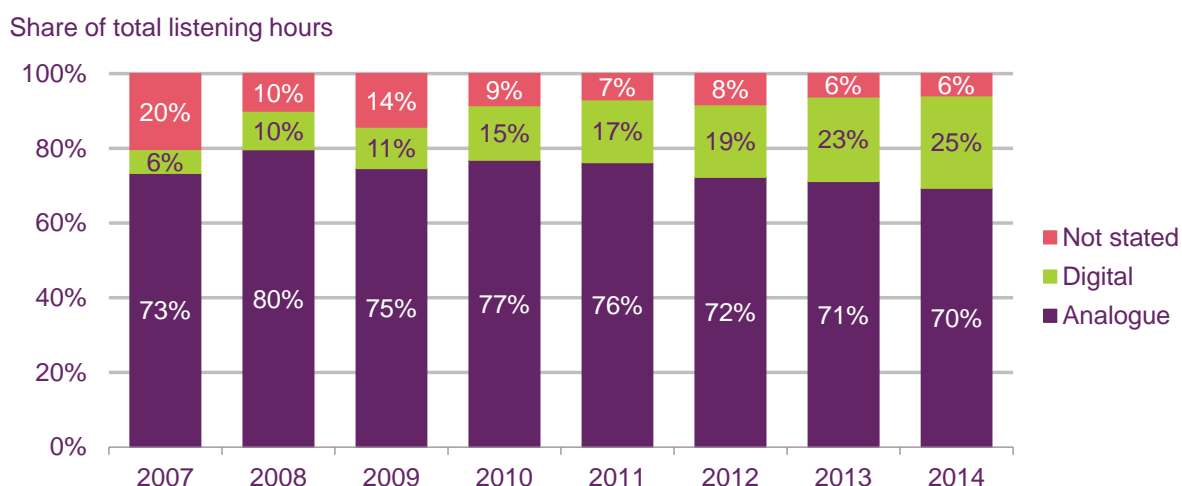
Figure 3.7 Share of listening hours via digital and analogue platforms: 2014



Source: RAJAR, All adults (15+), year ended Q4 2014

The share of listening hours accounted for by digital platforms has grown steadily over the years and is now 19pp higher than in 2007 (Figure 3.8). The fall in 'not stated' over six years reflects a change in RAJAR methodology, but the underlying trend of an increase in digital share, and gradual decline in analogue share, is still evident.

Figure 3.8 Share of listening hours via digital and analogue platforms in Northern Ireland: 2007-2014



Source: RAJAR, all adults, calendar years 2007-2014

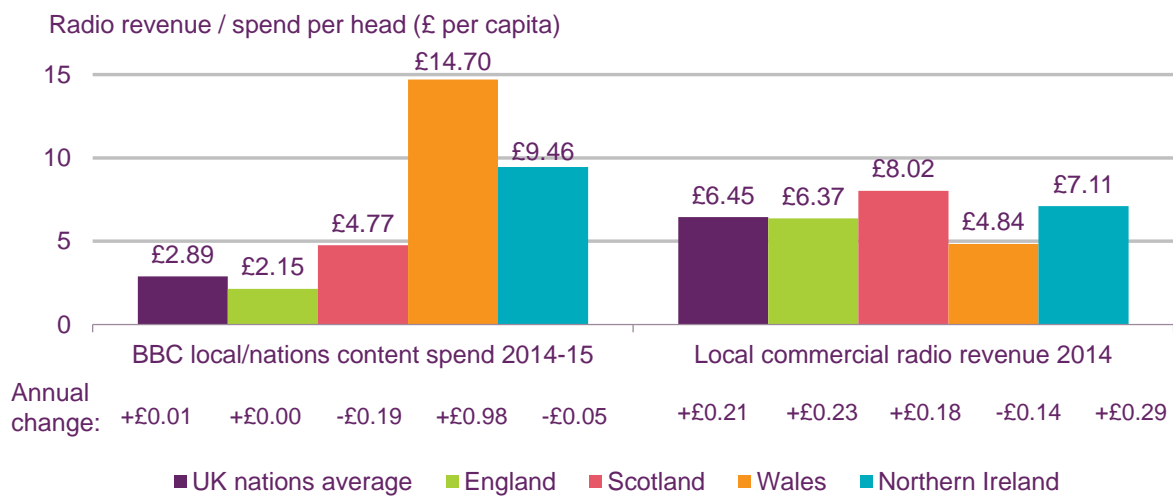
3.6 The radio industry

Revenue from local commercial radio grew faster in Northern Ireland than in any other nation

Local commercial radio revenue per head of population in Northern Ireland was £7.11 in 2014; an increase of 29p since 2013. This growth was driven by a 10% increase in local advertising revenue from these stations in Northern Ireland, which more than offset slight declines in revenues from sponsorship.

While revenues from local commercial stations increased, spend by the BBC on content for Radios Ulster and Foyle fell slightly. On a per-capita basis, 5p less per head was spent by the BBC on content for these stations.

Figure 3.9 Local/nations' radio spend and revenue per head of population: 2014



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 Telecoms and networks

4.1 Recent developments in Northern Ireland

Investment to target mobile not-spots

Arqiva, the company charged with carrying out the Government's UK-wide £150m Mobile Infrastructure Project (MIP), has identified potential locations for new mobile masts in Northern Ireland and is currently working on acquiring suitable sites, applying for planning permissions and building masts.

The project aims to expand mobile phone coverage to areas where there is currently no coverage from any UK operator, and is due to be completed in 2016. The majority of potential sites in Northern Ireland are in border areas, which means they have the potential to help tackle inadvertent roaming.

Broadband speeds set to increase

DETI, the Department of Culture Media & Sport (DCMS), and BT are investing around £17m to raise broadband speeds for up to 38,000 premises across Northern Ireland. The Superfast Broadband Roll-out Programme, announced in March 2015, aims to lift broadband speeds in these premises to superfast levels (>24Mbit/s, in line with DETI's definition of superfast broadband).²⁵

Most of the funding is coming from government sources, with DETI and DCMS contributing around £7m each. BT - which will deliver the Superfast Roll-out Programme - is contributing the other £3m towards the project.

The main elements of the scheme include: some re-engineering of BT's network; an additional 300 new fibred cabinets; and 300 new fibre-to-the-premise nodes being built, considerably expanding Northern Ireland's fibre footprint. The roll-out is due to be completed by December 2017.

This builds on the £23.7m NI Broadband Improvement Project, currently in its fourth phase, which is aimed mainly at improving speeds for around 45,000 premises currently only able to achieve download speeds of less than 2Mbit/s. This too involves some re-engineering of the network; around 450 new cabinets and 150 new fibre-to-the-premises nodes.

It also follows the £52m Next Generation Broadband Project, completed in 2012, which helped the fibre-enabling of 2,461 roadside cabinets.

Separately, in June 2015 the Department of Agriculture and Rural Development announced a further £2m investment in broadband through its Rural Development Programme.

The funding aims to improve broadband provision in hard-to-reach areas that are unlikely to benefit from fixed-line solutions. Applications for funding will be led by councils in partnership with local communities.

²⁵ Ofcom's definition of superfast broadband is connections with an actual speed ≥ 30 Mbit/s.

4.2 Availability of fixed broadband services

Almost all UK premises are able to receive basic broadband services

Three key technologies are used to provide fixed broadband services in the UK; exchange-based ADSL, cable (over a hybrid fibre-coaxial network) and fibre-to-the-cabinet (using VDSL in the street cabinet).²⁶ ADSL transmits data over the existing copper network, and is the cheapest of these technologies to deploy as, in most cases, it does not require an upgrade to the existing telephone network other than new equipment in the local exchange (cable and fibre roll-out both involve the deployment of new infrastructure to connect local exchanges/nodes to the end-user).

However, while ADSL technology has the benefit of being comparatively cheap to roll out, it is unable to provide the superfast speeds²⁷ that cable and fibre can, and some premises in ADSL-enabled areas may not be able to receive service, or may only be able to do so at very low speeds of as a result of the long length, or poor quality, of the telephone line from their premises to the local exchange.

By the end of 2014, almost all of BT's local exchanges (of which there are around 5,600 across the UK) had been upgraded to offer ADSL broadband services, and across the UK as a whole, the proportion of premises (i.e. homes and offices) that were connected to an ADSL-enabled exchange was over 99.9% (Figure 4.1). In Northern Ireland and Wales, all BT local exchanges have been upgraded to offer ADSL broadband services, while in England and Scotland there remain exchanges that are not ADSL-enabled, and the proportion of premises connected to ADSL-enabled exchanges is slightly lower.

Local-loop unbundling (LLU) enables an alternative provider to offer broadband services over the twisted copper pair from the local exchange to the end-user's premises. To do this, the LLU provider has to site its own equipment in the incumbent's local exchange and connect it to its own backhaul network. The advantage of LLU to ISPs is that it allows them to benefit from the economies of scale that are not available when purchasing wholesale services from the incumbent on a per-connection basis, and it also enables them to differentiate their retail products from those offered by their competitors. The deployment of LLU ADSL services in the UK has resulted in the availability of low-cost bundled broadband services to consumers living in unbundled exchange areas.

By the end of 2014, LLU availability in the UK was high, with 95% of premises being in areas served by unbundled local exchanges (an increase of just 0.2 percentage points compared to the previous year). Roll-out of any fixed telecoms network tends, initially at least, to be concentrated in urban areas (where there are a larger number of premises to be served) and this is reflected in the fact that the proportion of premises connected to an unbundled local exchange at the end of 2014 was higher in urban areas (over 99.9%) than in rural areas (77%). Along with Scotland, Northern Ireland had the joint-lowest proportion of premises connected to an unbundled local exchange at the end of 2014 (89%). England had the highest proportion, at 96%, while in Wales, the proportion was 93%.

²⁶ A small proportion of premises is also served by fibre-to-the-premises (FTTP).

²⁷ i.e. actual speeds of 'up to' 30Mbit/s or higher

Figure 4.1 Proportion of premises connected to ADSL-enabled and unbundled exchanges



Source: Ofcom / BT, December 2014 data

By May 2015 27% of premises in Northern Ireland could receive cable broadband services

Ofcom, as part of its work to monitor the UK’s communications market infrastructure, collects data showing the number of UK premises that are able to receive cable and fibre broadband services. It is important to note that not all cable and fibre broadband connections are capable of providing superfast broadband services (i.e. with an actual speed of 30Mbit/s or higher). For example, the speed achievable on a fibre-to-the-cabinet (FTTC) line will depend on the length and quality of the copper connection from the street cabinet to the user’s premises, as is the case with ADSL (these limitations do not apply to cable and fibre-to-the-premises services). Ofcom’s 2015 *Infrastructure Report Update*²⁸ will provide more detailed analysis of the distribution of fixed broadband speeds.

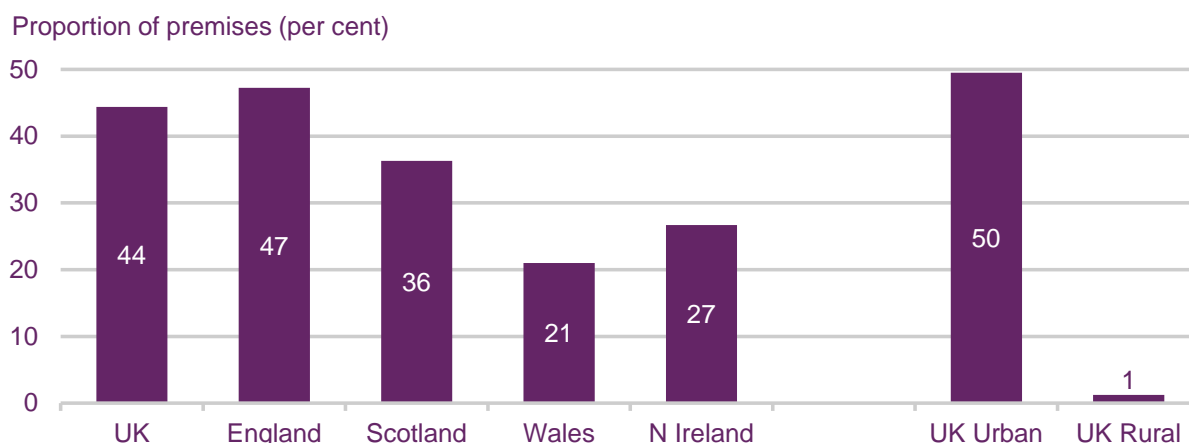
Urban and rural classifications

In previous *Communications Market Reports*, Ofcom has used a third-party data source (*Locale*) to classify postcodes as being urban or rural. This year, that data source was not available, so Ofcom has used the rural/urban classifications developed by DEFRA, NISRA and The Scottish Registry Office to produce urban/rural splits. Analysis shows that at an urban/rural split level, the two datasets correspond 95% of the time, where postcodes can be matched. However, each dataset cannot match 2.5% of all postcodes, and the unallocated postcodes differ between datasets. Therefore, the urban/rural classification of between 5% and 10% of postcodes varies between datasets, and the urban/rural figures in this report are not directly comparable to those in previous reports.

Data provided to Ofcom by Virgin Media shows that 44% of UK premises were able to receive cable broadband services over Virgin Media’s network in May 2015, unchanged from June 2014 (Figure 4.2). Across the UK nations, the proportion of premises able to receive Virgin Media cable broadband services (which offer advertised download speeds of ‘up to’ 50Mbit/s, 100Mbit/s and 152Mbit/s) ranged from 21% in Wales to 47% in England (in Northern Ireland it was 27%, the second lowest proportion across the nations). The proportion of premises able to receive Virgin Media cable broadband services was significantly higher in urban areas of the UK (50%) than in rural areas (1%).

²⁸ Due to be published in Q4 2015

Figure 4.2 Proportion of premises able to receive Virgin Media cable broadband services



Source: Ofcom / Virgin Media, May 2015 data

Northern Ireland had the highest proportion of premises that could receive fibre broadband services in May 2015

We have calculated the proportion of premises able to receive fibre broadband services using data provided by Openreach (a BT Group company) and Kcom (the incumbent provider in the Kingston-upon-Hull area).²⁹ As stated previously, it is important to note that not all fibre broadband connections will be able to achieve actual download speeds of 30Mbit/s.

Our analysis shows that by May 2015 82%³⁰ of UK premises were able to receive fibre broadband services over Openreach or Kcom's fibre broadband networks, a 13 percentage point increase compared to June 2014 (Figure 4.3). Northern Ireland had the highest proportion of premises that could receive fibre broadband services in May 2015 (92%, unchanged from June 2014) as a result of a Department of Enterprise, Trade and Investment (DETI) initiative to increase the availability of superfast broadband services.

Among the other nations, the proportion of premises served by Openreach or Kcom's fibre broadband networks ranged from 75% in Scotland to 83% in Wales and, as with cable services, the availability of fibre broadband services was higher in urban areas of the UK than in rural areas, with 84% of premises in urban areas being able to receive Openreach or Kcom's fibre broadband services, compared to 67% in rural areas.

Again, it is important to note that not all fibre broadband connections will be able to achieve actual downstream speeds of 30Mbit/s.

²⁹ Under regulatory rules other providers can provide retail fibre broadband services to consumers using these networks.

³⁰ It should be noted that this figure, and those given below, will understate actual fibre broadband availability as they exclude availability over networks other than Openreach and Kcom's.

Figure 4.3 Proportion of premises able to receive Openreach / Kcom fibre broadband services



Source: Ofcom / Openreach / Kcom, May 2015 data

By May 2015, 95% of premises in Northern Ireland could receive next generation access broadband services

We are able to estimate the proportion of premises that are served by next generation access (NGA) networks (used to deliver superfast broadband services) by combining the Virgin Media cable broadband availability data shown in Figure 4.2 with the Openreach/Kcom fibre broadband availability data shown in Figure 4.3.

Combining postcode-level availability data for cable and fibre services gives us a range of availability for NGA broadband services: for example, if cable broadband and fibre broadband services are both available to 50% of premises in a postcode, the availability of NGA services in that postcode will be somewhere between 50% of premises (where cable and fibre services are available to the same premises within the postcode area) to 100% of premises (where there is no overlap in the availability of cable and fibre services). In Figure 4.4 below, we show the mean of the possible range of availability of NGA services, which would be 75% in the example given above.

Our analysis indicates that 90% of UK premises were able to receive fixed broadband services over NGA networks by May 2015, a 12 percentage point increase compared to June 2014. High fibre broadband availability in Northern Ireland contributed to it having the highest availability of NGA broadband networks in May 2015, with 95% of premises having access to these services, unchanged from June 2014. Across the other UK nations, the proportion of premises that could receive NGA broadband services ranged from 85% in Scotland to 90% in England, with 87% of premises in Wales being within NGA network footprints. In urban areas of the UK, 92% of premises were able to receive NGA broadband services in May 2015, compared to 67% in rural areas.

Figure 4.4 Proportion of premises able to receive NGA broadband services



Source: Ofcom / Openreach / Virgin Media / Kcom, May 2015 data

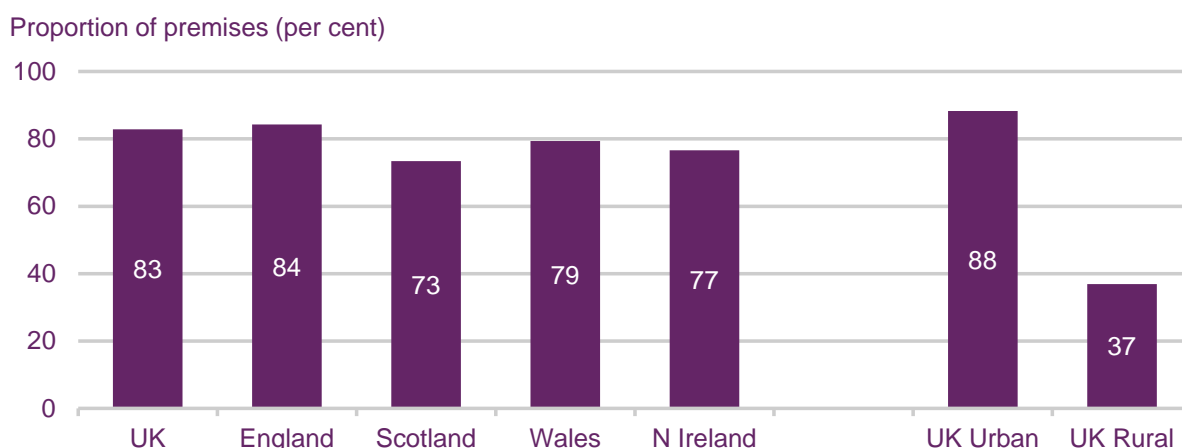
Seventy-seven per cent of premises in Northern Ireland were able to receive superfast broadband services in May 2015

As mentioned previously, not all NGA broadband connections are capable of providing superfast broadband services (i.e. those with an actual speed of 30Mbit/s or higher) and, in particular, the speed achievable over an FTTC connection will depend on the length and quality of the copper connection from the street cabinet to the user's premises. In collecting data to inform its work monitoring the UK's communications market infrastructure in 2015, Ofcom asked Virgin Media, Openreach and Kcom to provide postcode-level data regarding the proportion of premises that could receive superfast broadband services, i.e. a fixed broadband service with an actual speed of 30Mbit/s or higher.

As is shown in Figure 4.5 below, these data suggest that while 90% of UK premises were able to receive NGA broadband services in May 2015, the proportion that were able to receive superfast broadband services was seven percentage points lower, at 83%. While Northern Ireland had the highest proportion of premises able to receive NGA broadband services, it had the second lowest proportion that could receive superfast broadband services (77%), meaning that 18% of premises in Northern Ireland were in areas where NGA broadband was available, but were unable receive actual broadband speeds of 30Mbit/s; the highest proportion across the UK nations.

Among the other UK nations, the proportion of premises that could receive superfast broadband services ranged from 73% in Scotland to 84% in England (in Wales it was 79%). The proportion of premises that could receive superfast broadband services in urban areas of the UK (88%) was significantly higher than in rural areas (37%). This indicates that while across the UK as a whole, 7% of premises in NGA areas could not receive an actual fixed broadband download speed of 30Mbit/s, this proportion was much higher in rural areas (45%) than in urban areas (4%).

Figure 4.5 Proportion of premises able to receive superfast broadband services



Source: Ofcom / Openreach / Virgin Media / Kcom, May 2015 data

4.3 Mobile network coverage

Overview

How we measure the availability of mobile telephony for this report

The coverage information presented in Ofcom's *Communications Market Reports* and *Infrastructure Report* is collected by Ofcom from the four UK mobile network operators (MNOs). Information on coverage is provided by each operator for each 100x100m pixel of landmass across the UK. This information is correlated with maps of premises to give the premises' coverage figures.

The availability figures quoted all refer to outdoor coverage. Coverage figures 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, making it difficult to calculate accurate indoor coverage figures.

Figure 4.6, Figure 4.7 and Figure 4.8 show coverage levels for 2G, 3G and 4G mobile services respectively.³¹ 2G is considered satisfactory for telephone calls and text messaging, while 3G is considered the minimum necessary to provide an acceptable experience of accessing mobile data services. 4G generally provides a better user experience than 3G when accessing mobile data services as a result of the faster data speeds that it offers.

There are still areas of the UK where a lack of mobile coverage means that it is not possible to make mobile voice calls, send text messages and/or access mobile data services. These areas are known as 'mobile not-spots' and are often characterised by low population density and/or hilly terrain which present physical and economic obstacles that deter mobile network operators (MNOs) from deploying mobile network infrastructure in these areas. In other areas (known as 'partial not-spots') some operators have mobile coverage whereas others do not.

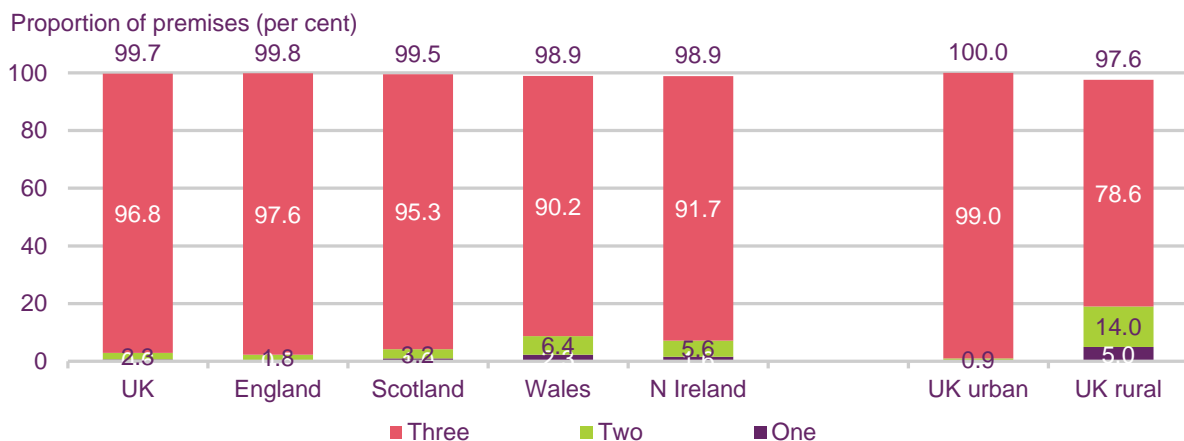
³¹ The availability data provided by the MNOs are taken from network planning tools, which are subject to a margin of error, and local factors such as tall buildings or trees can affect signal strength.

98.9% of premises in Northern Ireland were in areas with outdoor 2G coverage in May 2015

The coverage data provided to us by MNOs show that 96.8% of UK premises had outdoor coverage from all three 2G network operators (EE, O2 and Vodafone) in May 2015 (Figure 4.6). Overall, 99.7% UK of premises were in areas where at least one mobile network provided outdoor 2G coverage, suggesting that 0.3% of UK premises (around 75,000 premises) were in areas without any 2G mobile coverage. The proportion of UK premises in areas with outdoor 2G mobile coverage was higher in urban locations (100.0%) than in rural ones (97.6%).

Northern Ireland had the second lowest proportion of premises with outdoor coverage from all three 2G networks among the UK nations in May 2015, at 91.7%, while 1.1% of premises in Northern Ireland (around 8,000 premises) were in areas without 2G coverage. The lower-than-average 2G coverage in Northern Ireland is partly because a relatively large proportion of its population is evenly spread across its rural areas, and providing mobile services may not be commercially viable in some instances. England had the highest 2G coverage across the UK nations, with 97.6% of premises having outdoor coverage from all three 2G networks and 0.2% being in areas without any outdoor 2G coverage.

Figure 4.6 2G outdoor mobile coverage to premises, by number of operators



Source: Ofcom / operators, May 2015 data

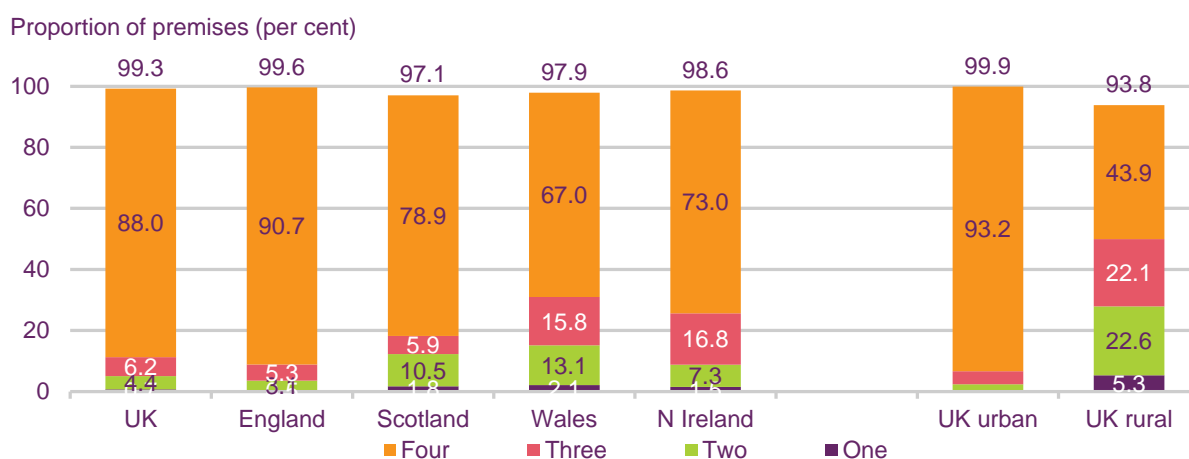
Note: Coverage is based on 100m² pixels covering the UK

Over 98% of premises in Northern Ireland had outdoor 3G coverage in May 2015

Our analysis suggests that 99.3% of UK premises were in areas where there was outdoor 3G mobile coverage in May 2015, while 88.0% were in areas where there was similar coverage from all four UK 3G networks (EE, O2, Vodafone and Three). Conversely, 0.7% of premises were in areas without any 3G mobile reception, equivalent to around 210,000 premises. The proportion of premises in areas with outdoor 3G coverage was higher in urban areas of the UK (99.9%) than in rural areas (93.8%).

As was the case with 2G services, the proportion of premises in areas with outdoor 3G mobile coverage was highest in England, where 99.6% of premises were in areas with coverage from at least one 3G network, and 90.7% had coverage from all four MNOs (Figure 4.7). Northern Ireland had the second highest proportion of premises in areas with outdoor 3G coverage from at least one MNO, among the UK nations, in May 2015, at 98.6%, 0.6 percentage points below the UK average, and also had the second lowest proportion of premises with similar coverage from all four 3G networks, at 73.0%.

Figure 4.7 3G outdoor mobile coverage to premises, by number of operators



Source: Ofcom / operators, May 2015 data

Note: Coverage is based on 100m² pixels covering the UK

91.1% of premises in Northern Ireland were in areas with outdoor 4G coverage in May 2015

The UK's four national MNOs are still in the process of deploying their 4G networks; this is reflected by the fact that the availability of 4G services in May 2015 is lower than of 2G and 3G services (Figure 4.8).

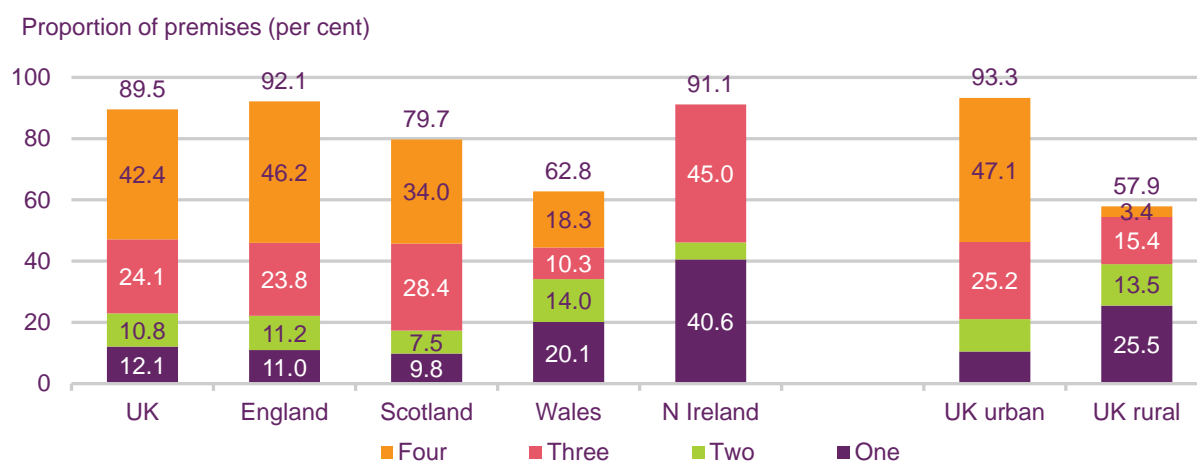
Data provided by the MNOs suggest that 89.5% of UK premises were in areas with outdoor mobile coverage from at least one 4G network in May 2015, a 17.7 percentage point increase compared to the 71.8% recorded in June 2014³². All four UK MNOs aim to have at least 98% 4G population coverage by the end of 2015, and the 4G spectrum licence acquired by O2 stipulates that it should provide indoor coverage to 98% of the UK population (and at least 95% of the population of each of the UK nations) by the end of 2017 at the latest.

Northern Ireland had the second highest proportion of premises in areas with outdoor 4G network coverage from at least one 4G network in May 2015, at 91.1%; this was despite Three not having launched 4G services in Northern Ireland, and was an 11.9 percentage point increase on June 2014, the lowest such increase among the UK nations over this period. The proportion of premises with outdoor 4G coverage ranged from 62.8% in Wales to 92.1% in England (in Scotland it was 79.7%).

The difference between urban and rural 4G coverage was much more marked for 4G services than for 2G and 3G in May 2015, with 93.3% of urban premises having outdoor 4G coverage, compared to 57.9% of those in rural areas.

³² All 4G coverage comparisons between 2014 and 2015 are indicative only as coverage data for Three was not available in 2014, and 2014 figures are therefore based on three rather than four UK MNOs.

Figure 4.8 4G outdoor mobile coverage to premises, by number of operators



Source: Ofcom / operators, May 2015 data

Note: Coverage is based on 100m² pixels covering the UK

4.4 Service take-up

Broadband take-up is below the UK average in Northern Ireland

Take-up of landline services, mobile phones and smartphones were all in line with the average for the UK as a whole in Northern Ireland in Q1 2015. This compares to Q1 2014, when smartphone take-up in Northern Ireland was lower than the UK average. In 2015, the proportion of adults with a tablet computer in Northern Ireland was in line with the UK average (both 54%), although the level of ownership of any type of computer in Northern Ireland (77%) was lower than the UK average (83%). This was due to lower household ownership of laptop computers (55% vs. 65%) and desktop computers (28% vs. 34%).

Three of the measures of household internet access, shown in Figure 4.9 below, were lower than the UK average in Northern Ireland in Q1 2015: total internet access (79% vs. 85%), broadband access (72% vs. 80%) and fixed broadband access (69% vs. 78%). In 2014 these measures had been at similar levels in Northern Ireland and the UK overall. Adults in urban areas of Northern Ireland are more likely than those in rural areas to own a smartphone (67% vs. 57%), to have a tablet computer in the household (57% vs. 48%) and to have mobile broadband access in the home (10% vs. 5%).

Figure 4.9 Take-up of communications services: 2015

		UK	N Ireland	England	Scotland	Wales	NI urban	NI rural
Individual								
Voice telephony	Fixed Line	84%	84%	85%	82%	83%	84%	85%
	Mobile phone	93%	91%	93%	91%	90%	91%	91%
	Smartphone	66%	63%	67%	63%	63%	67%	57%
Internet	Computer (any type)	83%	77%	84%	75%	84%	77%	75%
	Tablet computer	54%	54%	54%	52%	60%	57%	48%
	Total Internet ¹	85%	79%	86%	78%	86%	81%	76%
	Broadband (fixed & mobile) ²	80%	72%	81%	73%	78%	72%	74%
	Fixed Broadband	78%	69%	79%	71%	77%	68%	71%
	Mobile internet ³	61%	60%	62%	59%	59%	62%	56%

Source: Ofcom Technology Tracker, wave 1 2015

Notes: ¹Households with an internet connection of any description; ²Households with a fixed broadband and/or dedicated mobile broadband (dongle/SIM) data connection (excludes households that solely use a mobile handset/s to access the internet); ³households that use a use a mobile handset/s to access the internet (may also have any other type of internet access).

Base: All adults aged 16+ (n = 3756 UK, 504 Northern Ireland, 2264 England, 492 Scotland, 496 Wales, 249 Northern Ireland urban, 255 Northern Ireland rural)

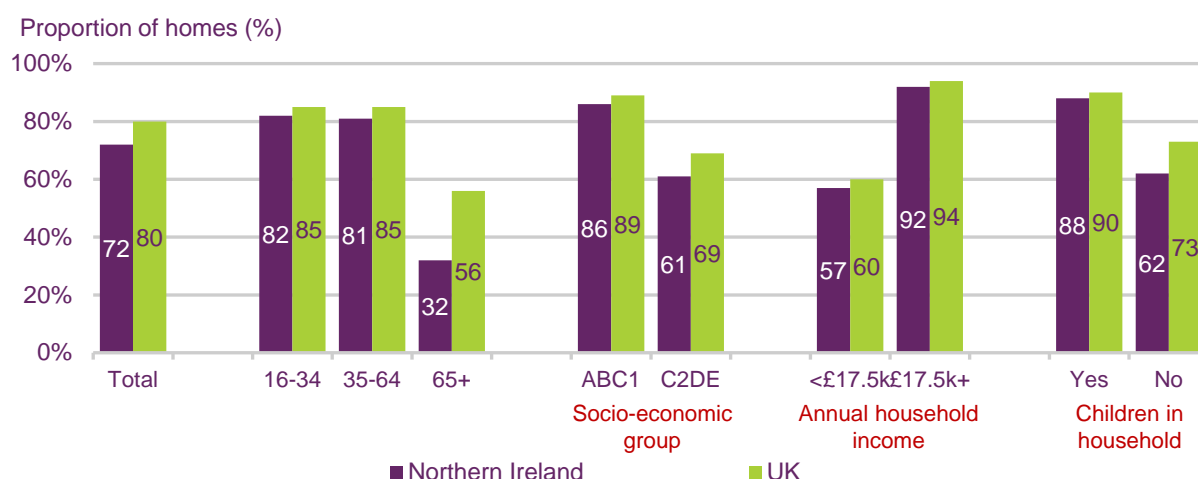
QC1. Is there a landline phone in your home that can be used to make and receive calls?/ QD2. Do you personally use a mobile phone?/ QD24B. Do you personally use a smartphone?/ QE1. Does your household have a PC or laptop computer?/ QE2. Do you or does anyone in your household have access to the internet/ World Wide Web at home?/ QE9. Which of these methods does your household use to connect to the internet at home?/ QD28A. Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?

Household broadband take-up in Northern Ireland is lower than the UK average among those aged 65, C2DE households and homes without children

As shown in Figure 4.10, consumer broadband take-up was lower in Northern Ireland (72%) than in the UK as a whole (80%) in Q1 2015. Across the different demographic groups, three had lower broadband take-up in Northern Ireland compared to the UK measure: adults aged 65 and over (32% for Northern Ireland vs. 56% for the UK), C2DE socio-economic groups (61% vs. 69%) and those without children in the household (62% vs. 73%).

As with the UK as a whole, there were differences in broadband take-up in Northern Ireland by age, socio-economic group, household income and the presence of children. Adults aged 65 and over were less likely to have broadband (32%) compared to 16-34s (82%) and 35-64s (81%). Broadband take-up was 25 percentage points higher among ABC1 households in Northern Ireland (86%) compared to C2DE households (61%). Similarly, there was a 35 percentage point difference in broadband take-up between households with an income below £17.5k (57%) and those with a household income above £17.5k (92%) in Northern Ireland. Households with children in Northern Ireland were more likely than households without children to have broadband at home (88% vs. 62%).

Figure 4.10 Consumer broadband take-up in Northern Ireland, by demographic



Source: Ofcom Technology Tracker, wave 1 2015
 Base: All adults aged 16+ (n =504 Northern Ireland, 168 16-34s, 235 35-64s, 101 65+, 238 ABC1, 265 C2DE, 147 <£17.5k income, 141 £17.5k+, 187 children in home, 317 no children in home)
 QE9. Which of these methods does your household use to connect to the internet at home?

A majority of adults in Northern Ireland had been online using their mobile phone in the previous week

In Q1 2015, six in ten (60%) adults in Northern Ireland said that they used their mobile phone to access the internet, with almost all of these (93%) saying they had done so in the previous week (Figure 4.11). These figures were in line with the UK average. There was a nine percentage point increase in use of a mobile phone to access the internet in the year to Q1 2015, up from 51%.

Figure 4.11 Proportion of adults who have used a mobile phone to access the internet



Source: Ofcom Technology Tracker, wave 1 2015
 Base: All adults aged 16+ (n = 3756 UK, 504 Northern Ireland, 2264 England, 492 Scotland, 496 Wales, 249 Northern Ireland urban, 255 Northern Ireland rural, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013, 499 Northern Ireland 2014, 504 Northern Ireland 2015)
 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?

A quarter of adults in Northern Ireland have a 4G service

Figure 4.12 shows that just over a quarter (26%) of adults in Northern Ireland had a 4G service in Q1 2015, in line with the UK average of 30%. The proportion of 4G users in Northern Ireland increased by 17 percentage points in the year to Q1 2015 (up from 9% in Q1 2014).

Figure 4.12 4G take-up, by nation



Source: Ofcom Technology Tracker, wave 1 2015

Base: All adults aged 16+ (n = 3756 UK, 438 Northern Ireland, 2264 England, 492 Scotland, 496 Wales

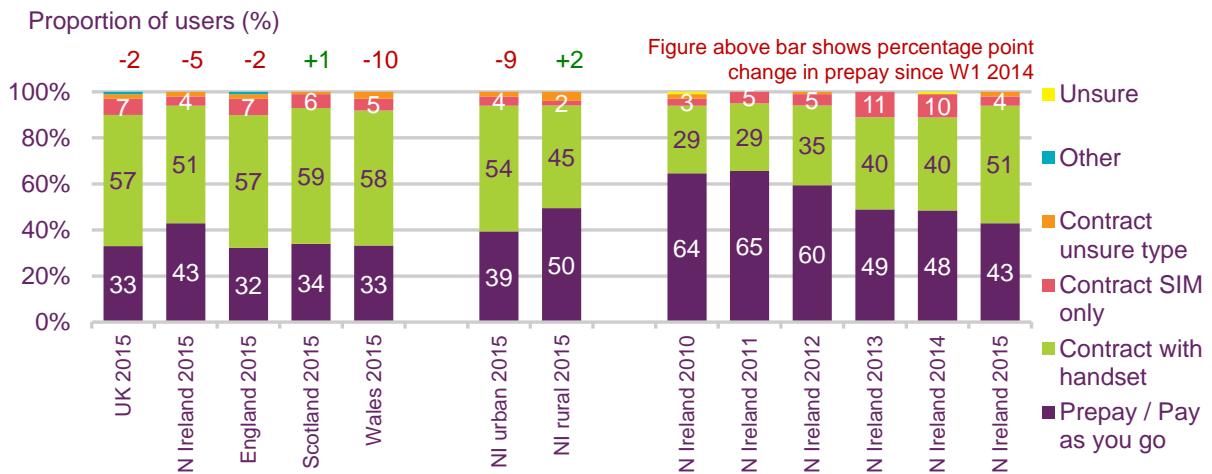
QD6 (QD41). Do you have a 4G service? This is a relatively new service that enables faster mobile internet access

Take-up of pay-monthly mobile services remains below the UK average in Northern Ireland

Northern Ireland continued to have the highest proportion of mobile phone users who mostly used a pre-pay service in Q1 2015 (43%); ten percentage points higher than the UK average of 33% (Figure 4.13). There was an increase in take-up of pay-monthly mobile services including a handset (rather than SIM-only) in Northern Ireland in the year to Q1 2015, from 40% to 51%.

The proportion of mobile users in Northern Ireland who mainly used pre-pay services did not change significantly in the year to Q1 2015, despite a nine percentage point fall in pre-pay mobile use among mobile phone users in urban areas of Northern Ireland (from 48% to 39%). Mobile phone users in rural areas of Northern Ireland were more likely to be pre-pay users (50%).

Figure 4.13 Type of mobile subscription



Source: Ofcom Technology Tracker, wave 1 2015

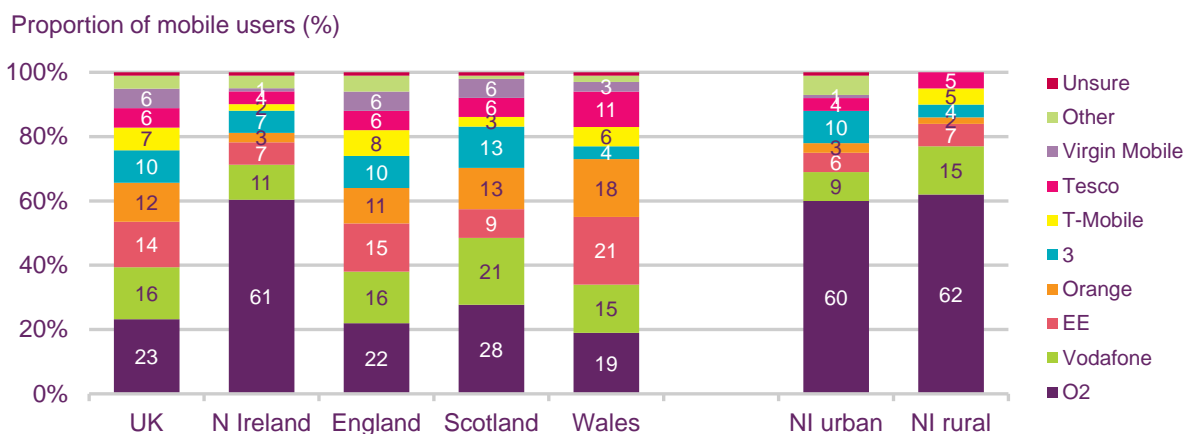
Base: Adults aged 16+ who personally use a mobile phone (n = 3425 UK, 456 Northern Ireland, 2080 England, 450 Scotland, 439 Wales, 226 Northern Ireland urban, 230 Northern Ireland rural, 658 Northern Ireland 2010, 425 Northern Ireland 2011, 463 Northern Ireland 2012, 463 Northern Ireland 2013, 465 Northern Ireland 2014, 456 Northern Ireland 2015)

QD11. Which of these best describes the mobile package you personally use most often?

O2 is the most frequently-used mobile network provider for three in five mobile users in Northern Ireland

Sixty one per cent of mobile users in Northern Ireland said O2 was the network they used most often, compared to just under a quarter (23%) across the UK as a whole, in line with previous years (Figure 4.14). Across Northern Ireland as a whole Vodafone was the second most popular mobile network provider (11%) in Q1 2015; this was also the case in rural Northern Ireland (15%). However, Three was the second most popular network provider in urban Northern Ireland (10%).

Figure 4.14 Mobile network provider used most often



Source: Ofcom Technology Tracker, wave 1 2015

Base: Adults aged 16+ who personally use a mobile phone

QD10. Which mobile network do you use most often?

4.5 Satisfaction with telecoms services

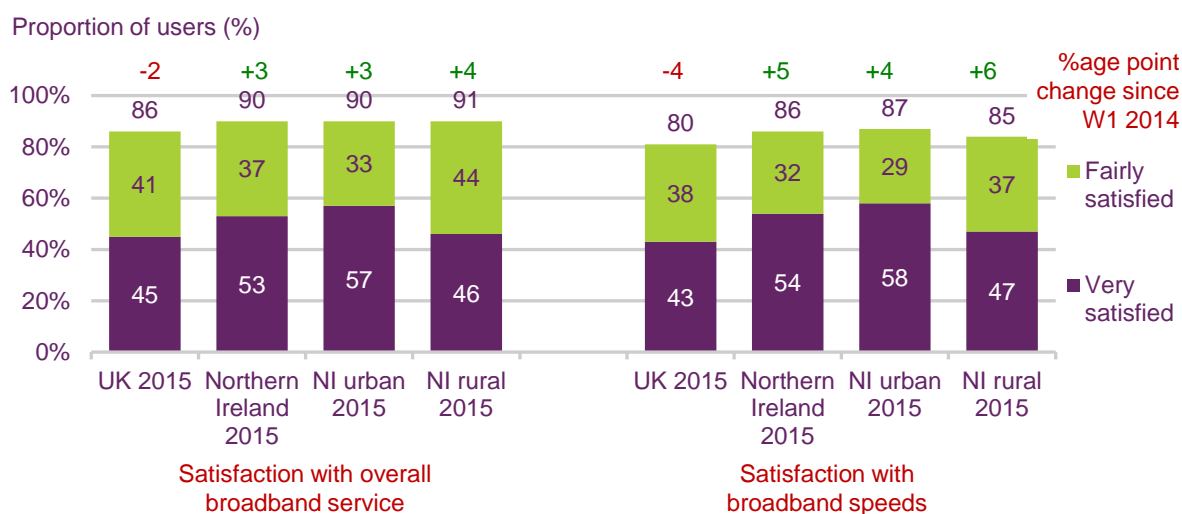
Fixed broadband users in Northern Ireland are more likely to be satisfied with their overall service and broadband speeds, compared to all UK users

Nine in ten fixed broadband users (90%) in Northern Ireland were 'very' or 'fairly' satisfied with their fixed broadband service in Q1 2015 (Figure 4.15). This was higher than the UK average of 86%, and users in Northern Ireland were also more likely to say they were 'very' satisfied (53% vs. 45%). Compared to Q1 2014 there has been no change in satisfaction with the broadband service in Northern Ireland, or in the UK overall.

As with overall satisfaction, fixed broadband users in Northern Ireland were more likely to be satisfied with their broadband speeds than the UK average (86% vs. 80%), with users in Northern Ireland being more likely to say they were 'very' satisfied (54% vs. 43%). While there was a fall in satisfaction with fixed broadband speeds across the UK as a whole in the year to Q1 2015 (down from 84% to 80%) there was no such change in satisfaction with broadband speeds among internet users in Northern Ireland over this period.

Fixed broadband users in urban and rural areas of Northern Ireland were equally as satisfied with the speed of their services (possibly related to the high rural fibre broadband availability in Northern Ireland, as shown in Figure 4.3).

Figure 4.15 Satisfaction with overall service and speed of fixed broadband connection



Source: Ofcom Technology Tracker, wave 1 2015

Base: Adults aged 16+ with a fixed broadband connection at home (n = 2781 UK, 335 Northern Ireland, 162 Northern Ireland urban, 173 Northern Ireland rural)

Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with their speed of service while online

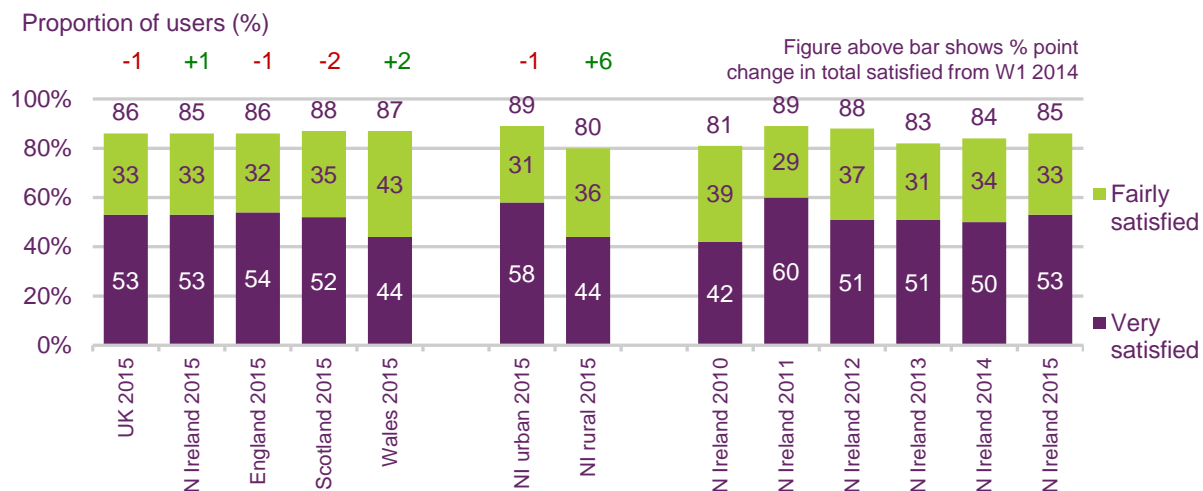
QE8b. Thinking about your fixed broadband internet service, how satisfied are you with (main supplier) for the overall service/ for the speed of your service while online (not just the connection)?

Satisfaction with mobile reception is in line with the UK average in Northern Ireland

More than eight in ten mobile phone users in Northern Ireland (85%) were 'very' or 'fairly' satisfied with their mobile reception in Q1 2015 (Figure 4.16). Responses were in line with the UK average at an overall level, and in terms of the proportion saying they were 'very' or 'fairly' satisfied with their mobile phone reception.

There was no change in satisfaction with reception among mobile phone users in Northern Ireland in the year to Q1 2015, and mobile users in urban areas of Northern Ireland were more likely to say they were satisfied compared to those in rural areas (89% vs. 80%), because the proportion that were 'very' satisfied was higher (58% vs. 44%).

Figure 4.16 Satisfaction with reception of mobile service



Source: Ofcom Technology Tracker, wave 1 2015

Base: Adults aged 16+ who personally use a mobile phone (n = 3425 UK, 456 Northern Ireland, 2080 England, 450 Scotland, 439 Wales, 226 Northern Ireland urban, 230 Northern Ireland rural, 658 Northern Ireland 2010, 425 Northern Ireland 2011, 463 Northern Ireland 2012, 463 Northern Ireland 2013, 465 Northern Ireland 2014, 456 Northern Ireland 2015)

Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with their mobile reception

QD21c. Thinking about your mobile phone service only, how satisfied are you with (main supplier) for reception/ accessing network?

5 Internet and web-based content

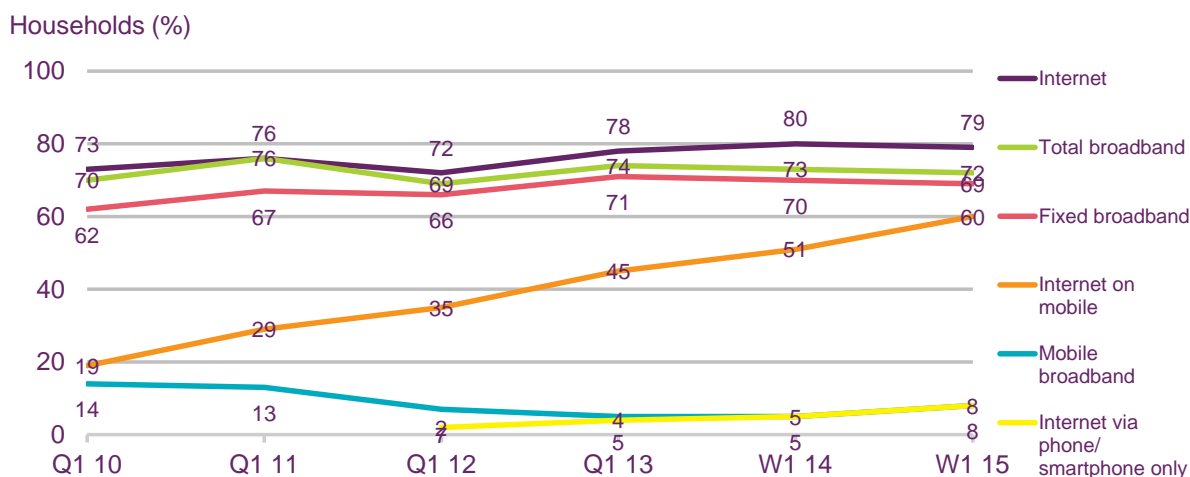
5.1 Internet take-up

Close to eight in ten households in Northern Ireland have access to the internet

In 2015, about eight in ten households in Northern Ireland (79%) had access to the internet via broadband, mobile phone or narrowband (dial-up), consistent with take-up in 2014 (80%). Throughout this chapter, we note differences which are statistically significant. Depending on sample size and reported number, not all differences between reported figures reflect real changes in take-up or use of devices or services.

Seven in ten households in Northern Ireland (69%) have access to fixed broadband at home, also unchanged since 2014 (70%). Six in ten (60%) adults in Northern Ireland have online access through a mobile phone, an increase of nine percentage points (pp) since 2014. The proportion of adults in Northern Ireland accessing the internet exclusively through a mobile phone or smartphone remains stable at 8%.

Figure 5.1 Internet take-up, Northern Ireland: 2010-2015



Source: Ofcom Technology Tracker. Data from Q1 of each year 2010-2013, then wave 1 2014-2015
 Base: All adults aged 16+ (n = 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013, 499 Northern Ireland 2014, 504 Northern Ireland 2015)

Note 1: 'Internet' includes access to the internet/ World Wide Web at home (via any device, e.g. PC, mobile phone, tablet etc.

Note 2: 'Total broadband' includes the following methods to connect to the internet at home – fixed broadband (via phone line or cable service), mobile broadband (via a USB stick or dongle, or built-in connectivity in a laptop/netbook/tablet with a SIM), tethering (via mobile phone internet connection on laptop/tablet), and mobile broadband wireless router (via 3G or 4G mobile network, which can be shared between devices).

Note 3: 'Fixed broadband' includes ADSL, cable and fibre services – perhaps using a WiFi router. This would include superfast broadband services.

Note 4: 'Mobile broadband' is connecting a device using a USB stick or dongle, or built-in connectivity in a laptop or netbook or tablet computer with a SIM card.

Note 5: 'Internet on mobile' is the proportion of adults who use a mobile phone for any of the following activities: Instant messaging, downloading apps or programs, email, internet access, downloading video, video streaming, visiting social networking sites.

5.2 Internet-enabled devices

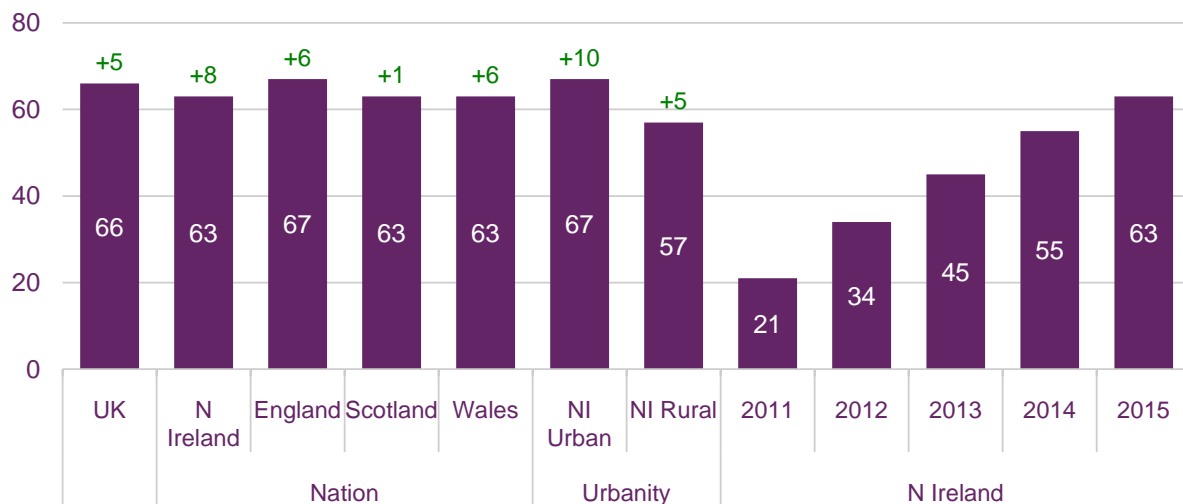
Smartphone ownership in Northern Ireland grew to 63% of adults in 2015

Smartphone ownership in Northern Ireland grew 8pp between 2014 and 2015, with about six in ten adults owning one (63%) in 2015.

The incidence of smartphone ownership among adults in Northern Ireland does not differ statistically from the UK average (66%). Ownership in 2015 is more likely among those in urban than rural areas (67% vs. 57%).

Figure 5.2 Take-up of smartphones in Northern Ireland

Adults 16+ (%) / percentage point change in take-up of smartphones from W1 2014



Source: Ofcom Technology Tracker, wave 1 2015 Base: All adults aged 16+ (n = 3756 UK, 504 Northern Ireland, 2264 England, 492 Scotland, 496 Wales, 249 Northern Ireland urban, 255 Northern Ireland rural, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013, 499 Northern Ireland 2014, 504 Northern Ireland 2015)

QD24B. Do you personally use a smartphone? A smartphone is a phone on which you can easily access emails, download files and applications, as well as view websites and generally surf the internet. Popular brands of smartphone include BlackBerry, iPhone and Android phones such as the Samsung Galaxy.

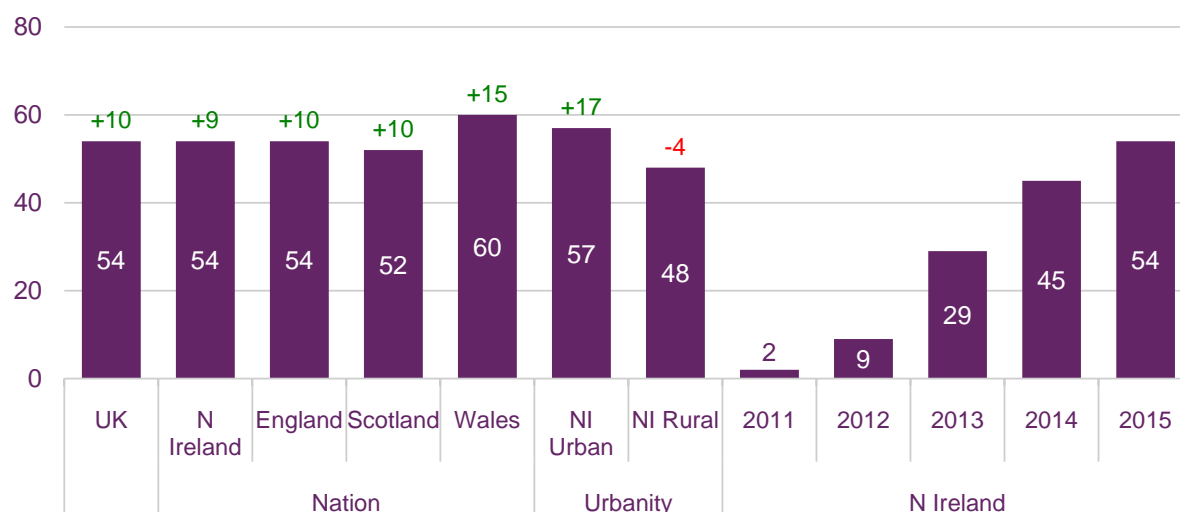
Over half of all households in Northern Ireland have a tablet computer, up by nine percentage points on 2014

Tablet ownership has continued to increase among adults in Northern Ireland and in the UK overall. A majority of adults in Northern Ireland say they have a tablet computer in the household (54%), compared to less than half (45%) in 2014. The increase in ownership levels since 2014 is in line with the increase for the UK as a whole, and tablet ownership in Northern Ireland matches the incidence for all UK adults (54%).

The increase in tablet ownership in Northern Ireland as a whole since 2014 is due to its increase in urban areas: up by 17pp to 57%. Tablet ownership in rural areas of Northern Ireland has not changed since 2014 and is now lower than in urban areas, at 48%.

Figure 5.3 Take-up of tablet computers in Northern Ireland

Households (%) / percentage point change in take-up of tablet computers from W1 2014



Source: Ofcom Technology Tracker, wave 1 2015

Base: All adults aged 16+ (n = 3756 UK, 504 Northern Ireland, 2264 England, 492 Scotland, 496 Wales, 249 Northern Ireland urban, 255 Northern Ireland rural, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013, 499 Northern Ireland 2014, 504 Northern Ireland 2015)

QE1. Does your household have a PC, laptop, netbook or tablet computer?

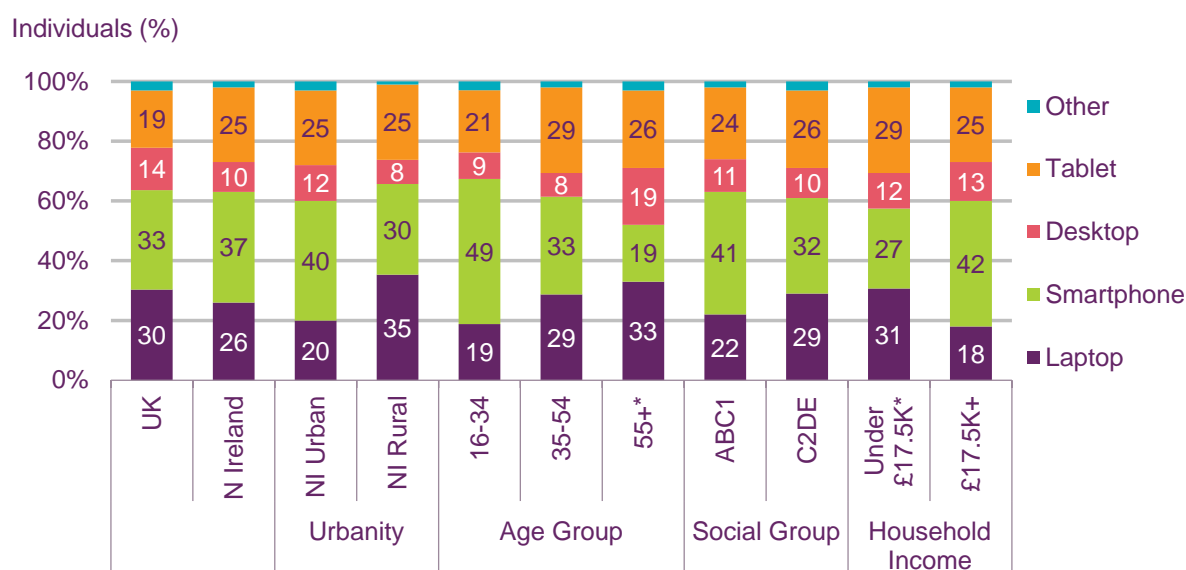
Smartphones are the most important device for going online for internet users in Northern Ireland, but tablets are also relatively important, compared to the UK as a whole

When asked to name their most important device for accessing the internet, no single device was named by a majority of adult internet users in Northern Ireland. The most commonly named device was a smartphone (37%), similar to the result for the UK as a whole (33%). Compared to the UK average, internet users in Northern Ireland were more likely to cite a tablet computer as their most important device (25% and 19% respectively), and less likely to cite a desktop computer (10% vs. 14%).

About half (49%) of internet users aged 16-34 say a smartphone is their most important device for going online; a higher proportion than for older internet users.

Internet users in rural areas of Northern Ireland are more likely than those in urban areas to cite a laptop computer as the most important device (35% compared to 20%). Apart from this, there are no significant differences between urban and rural areas in relation to most-favoured devices.

Figure 5.4 Most important device for accessing the internet: Northern Ireland



Source: Ofcom Technology Tracker, wave 1 2015

Base: Internet users aged 16+ (n = 3095 UK, 383 Northern Ireland, 193 Northern Ireland urban, 190 Northern Ireland rural, 161 16-34, 146 35-54, 76* 55+, 214 ABC1, 169 C2DE, 80* under £17.5K, 131 £17.5K+)

QE40. Which is the most important device you use to connect to the internet, at home or elsewhere? "Other" responses include: "other device", "none" and "don't know". * Caution: Low base

5.3 Internet use

Internet users in Northern Ireland say they spent significantly more time online in 2014 than they did in the previous year

According to research conducted for Ofcom's *Adult Media Literacy Report*³³, internet users in Northern Ireland claimed to spend 21.6 hours on the internet per week, while in 2013 they claimed to spend 13.8 hours per week. As elsewhere in the UK, internet users in Northern Ireland say they spend the majority of time online at home, followed by their workplace or place of education.

³³ Available from online at <http://stakeholders.ofcom.org.uk/market-data-research/other/research-publications/adults/media-lit-10years/>

Figure 5.5 Claimed time spent on the internet in a typical week

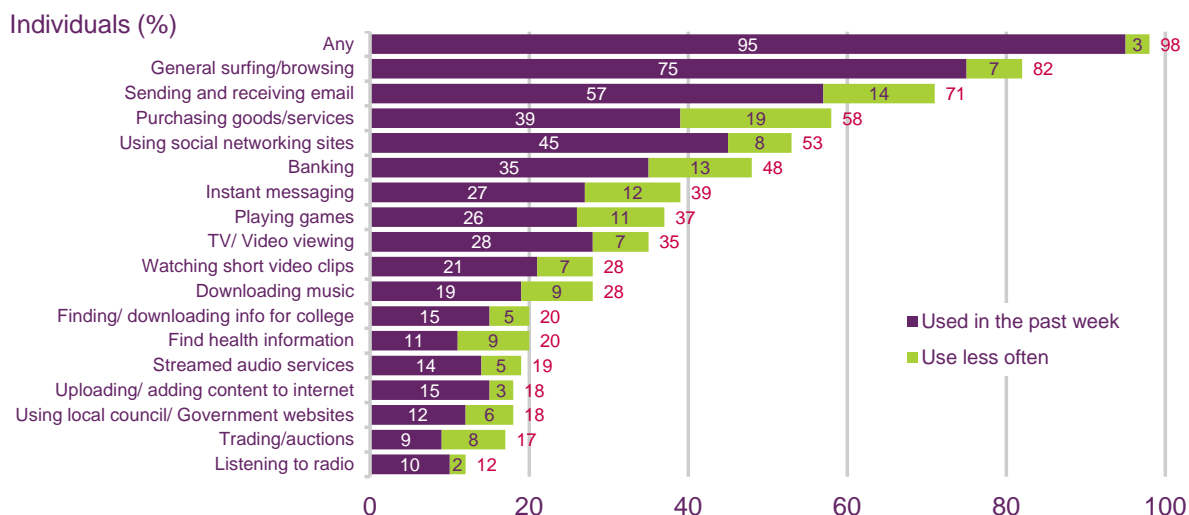


Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2014
 Question: IN6A-C – How many hours in a typical week would you say you use the internet at home/ at your workplace or place of education/ anywhere else? (Unprompted responses, single coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1609 UK, 1022 England, 194 Scotland, 200 Wales, 193 Northern Ireland).

More than half of internet users in Northern Ireland had used the internet for general surfing/browsing or sending and receiving email in the past week

Four activities were undertaken by a majority of internet users in Northern Ireland: general surfing or browsing (82%), sending and receiving email (71%), purchasing goods or services (58%) and using social networking sites (53%). The first two of these activities had been undertaken in the previous week by a majority of internet users in Northern Ireland.

Figure 5.6 Activities done online by internet users in Northern Ireland



Source: Ofcom Technology Tracker, wave 1 2015
 Base: Adults aged 16+ who use the internet at home or elsewhere (n= 383 Northern Ireland 2015)
 QE5. Which, if any, of these do you use the internet for?

6 Post

6.1 Recent developments in Northern Ireland

Single-tier pricing for senders across the whole of Ireland

The existence of the universal postal service means that everyone in the UK, no matter where they are, is charged the same rate for universal postal services. They are charged international rates for sending mail to the Republic of Ireland. Presently, customers in the Republic of Ireland are charged the same domestic rate for sending a letter anywhere on the island of Ireland (including Northern Ireland).

A motion calling for single-tier pricing for stamps on the island of Ireland was debated and passed in the Northern Ireland Assembly in September 2014. The motion, signed by three Sinn Féin MLAs, also called on the then Enterprise Minister Arlene Foster to raise the issue at the North-South Ministerial Council and to “exert maximum pressure” on the relevant companies and agencies.

Online delivery restrictions for Northern Ireland consumers

A report from the Consumer Council for Northern Ireland, released in June 2015, said that a third of online retailers apply restrictions to Northern Ireland (NI), which can include higher charges, longer delivery times, and refusal to deliver to NI.

The Consumer Council say that this “level of exclusion is similar to other peripheral areas of the UK” (Isle of Man and Scottish Highlands) but is considerably higher than other regions such as Wales or Scotland.

The report also states that only half of online retailers offer the same delivery service across the UK, regardless of location. Free delivery was withdrawn by 4% of retailers when delivering to NI, while standard delivery was withdrawn by one in ten retailers. In these cases, the Consumer Council said that consumers could end up paying on average £10.00 for ‘free’ delivery or an additional £2.71 for ‘standard’ delivery.

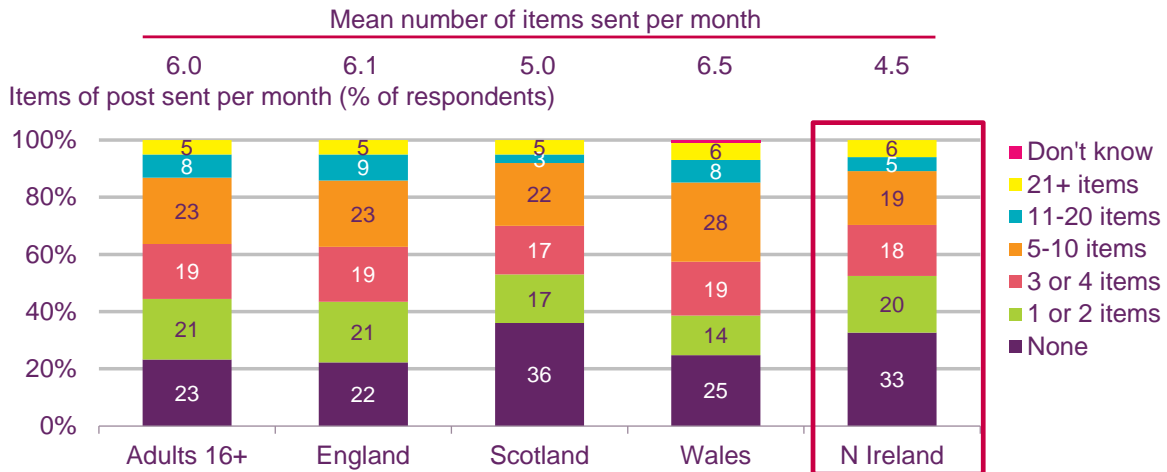
One in five retailers indicated that delivery times would vary, and almost a fifth of retailers withdrew some of the delivery options available.

6.2 Sending post: residential customers

One in three residents in Northern Ireland did not send any items through the post in the past month

Adults in Northern Ireland claimed to send 4.5 items of post per month on average, the lowest across the UK nations. This figure was brought down, in part, by the third (33%) of people who said they had not sent any items of post in the past month.

Figure 6.1 Approximate number of items of post sent each month



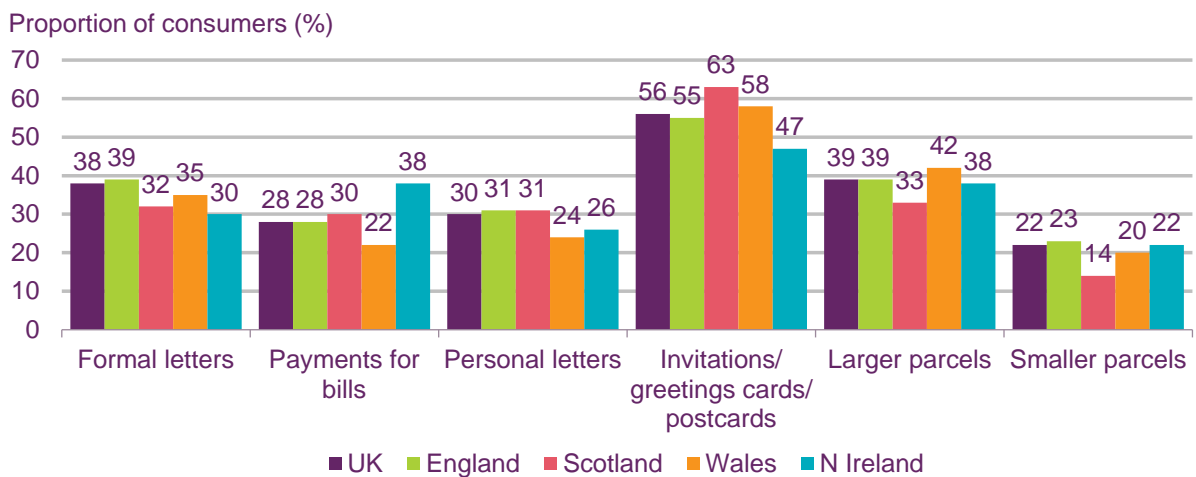
Source: Ofcom Residential Postal Tracker, Q2 2014-Q1 2015
 Base: All respondents (n = 3557 UK, 2123 England, 580 Scotland, 418 Wales, 436 Northern Ireland)
 QC1. Approximately how many items of post - including letters, cards and parcels - have you personally sent in the last month?

Adults in Northern Ireland are the least likely to have sent personal letters in the past month

Although people in Northern Ireland send the fewest items of post each month on average, Figure 6.2 shows that those in Northern Ireland are more likely than those in the rest of the UK to have sent payments for bills in the past month (38% vs. 28% overall UK). However, they are the least likely of all the UK nations to have sent any personal mail (including personal letters, invitation/ greeting/postcards) in the past month (61% vs. 70% across the UK).

When asked about their attitudes to sending and receiving post, those in Northern Ireland are less likely than the UK average to say they 'love to send and receive letters and cards' (49% vs. 58%).

Figure 6.2 Types of post sent in the past month



Source: Ofcom Residential Postal Tracker, Q2 2014-Q1 2015
 Base: All who have personally sent any items of post in the last week (n = 2685 UK, 1673 England, 382 Scotland, 330 Wales, 300 Northern Ireland)

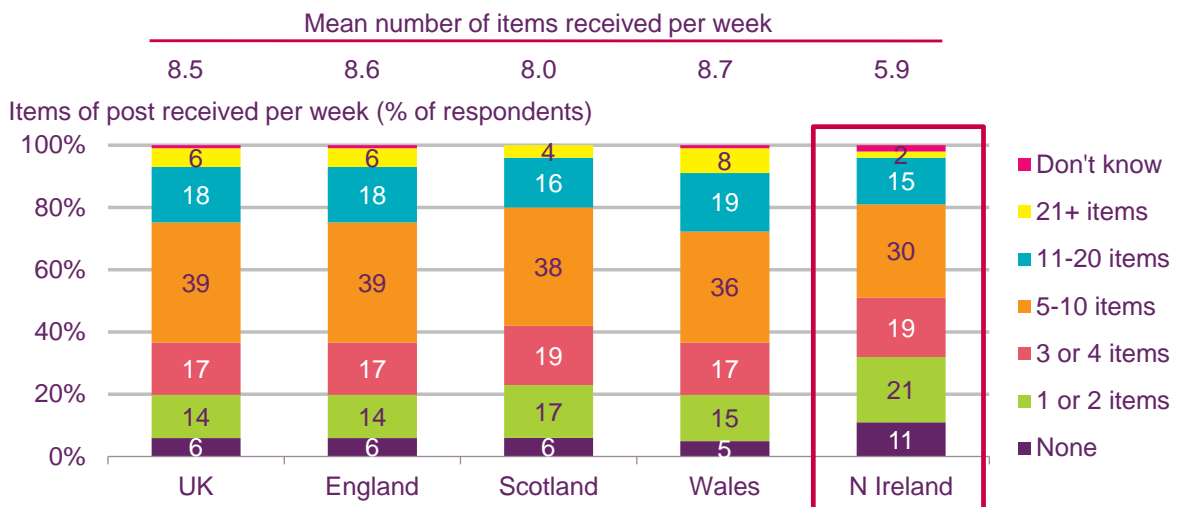
QC5. Which of these types of mail would you say you have personally sent in the last month by post? (multicode)

6.3 Receiving post: residential customers

One in ten adults in Northern Ireland had received no items of post in the past week

On average, people in Northern Ireland say they receive around six items (5.9) each week, again, the lowest across the UK nations. (Figure 6.3) Northern Ireland also had the highest proportion of people who said that they had received no items through the post in the past week (11%). Of those who had received post, a quarter (25%) claimed to have received at least one parcel in the past week, again the lowest across the UK nations.

Figure 6.3 Approximate number of items of post received in the past week



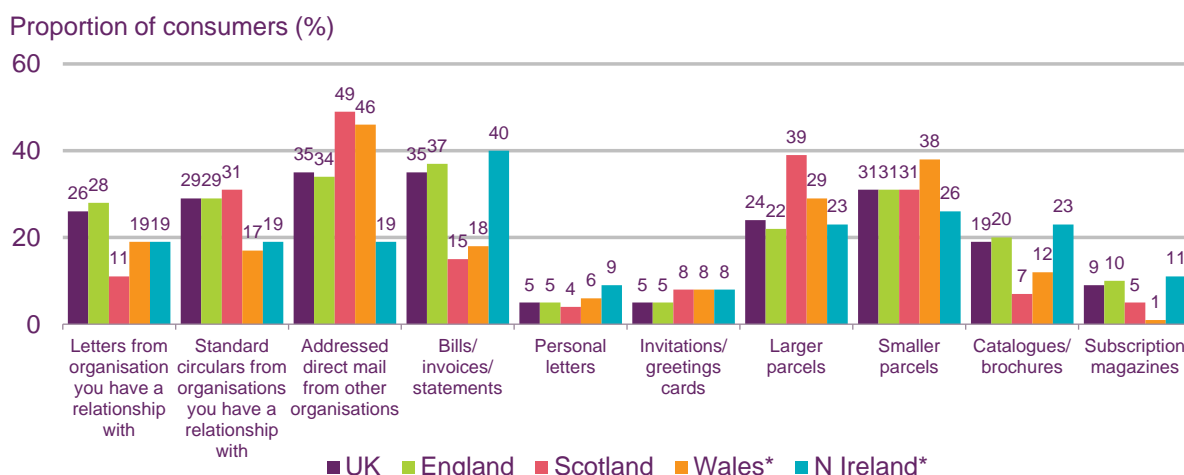
Source: Ofcom Residential Postal Tracker, Q2 2014-Q1 2015

Base: All respondents (n = 3557 UK, 2123 England, 580 Scotland, 418 Wales, 436 Northern Ireland)
 QD1. Approximately how many items of post – including letters, cards and parcels – have you personally received in the past week?

A third of those receiving more post than two years ago say they are receiving more parcels

Sixteen per cent of adults in Northern Ireland claim to be receiving more post than they did two years ago. Among these, two-fifths (40%) say they are receiving more bills and statements, the highest of all the UK nations. In addition, about a third said that they are receiving more parcels than two years ago.

Figure 6.4 Types of items people are receiving more often



Source: Ofcom Residential Postal Tracker, Q2 2014-Q1 2015

Base: All respondents who say that the number of items received by post has increased, compared to two years ago (n = 885 UK, 580 England, 130 Scotland, 98 Wales, 77 Northern Ireland)

QD6. Which of these types of addressed items are you personally receiving more often through the post now? (multicode) *Caution: low base

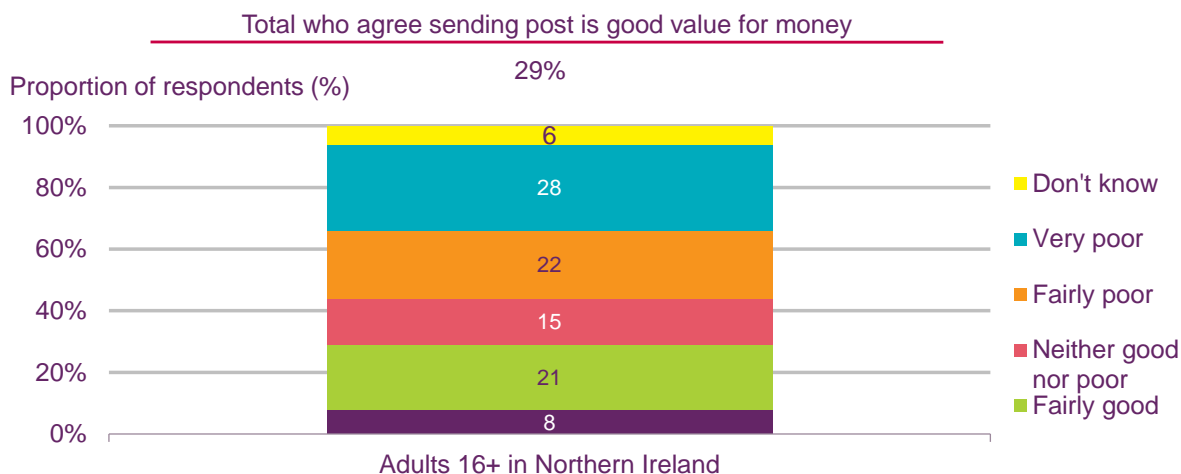
6.4 Sending post to / receiving post from the Republic of Ireland

Half of adults in Northern Ireland think the cost of sending a letter to the Republic of Ireland is poor value for money

Of adults in Northern Ireland who had sent post in the past month, only one in ten (13%) had sent any items to the Republic of Ireland. Of those who had received items in the past week, only 10% had been sent from the Republic of Ireland.

Figure 6.5 shows that when asked to consider the cost of posting a standard letter to the Republic of Ireland (97p at the time of the survey), half of all adults in Northern Ireland perceived this to offer poor value for money. Around three in ten (29%) saw it as good value for money.

Figure 6.5 Value for money of sending a standard letter to the Republic of Ireland



Source: Ofcom Residential Postal Tracker, Q2 2014-Q1 2015

Base: All respondents in Northern Ireland (n = 436)

QF5. (Show card) It currently costs 97p to send a standard letter from Northern Ireland to the Republic of Ireland. How would you rate this service in terms of value for money? (single code)

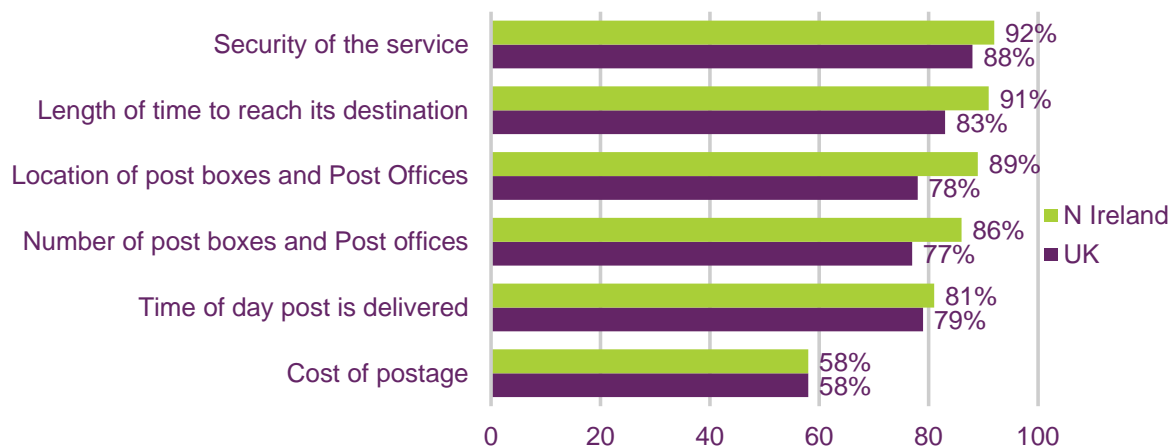
6.5 Attitudes towards Royal Mail

Nine in ten people in Northern Ireland are satisfied with Royal Mail

When asked about their overall satisfaction levels with Royal Mail, the majority of people in Northern Ireland (89%) stated that they were either 'very satisfied' or 'fairly satisfied' compared to 86% across the UK overall.

Considering their satisfaction with specific aspects of the service (Figure 6.6), people in Northern Ireland are more likely to be happy with the security of the postal service (94% vs 88% across the UK), the length of time it takes for mail to reach its destination (89% vs 83% UK average) and the number of post boxes and Post Offices, compared to the UK as a whole (83% vs. 77%).

Figure 6.6 Satisfaction with specific aspects of Royal Mail's service



Source: Ofcom Residential Postal Tracker, Q2 2014-Q1 2015

Base: All respondents (n = 3557 UK, 436 Northern Ireland)

QE3A-F. Satisfaction with specific aspects of Royal Mail's services – ranked by proportion satisfied among NI adults

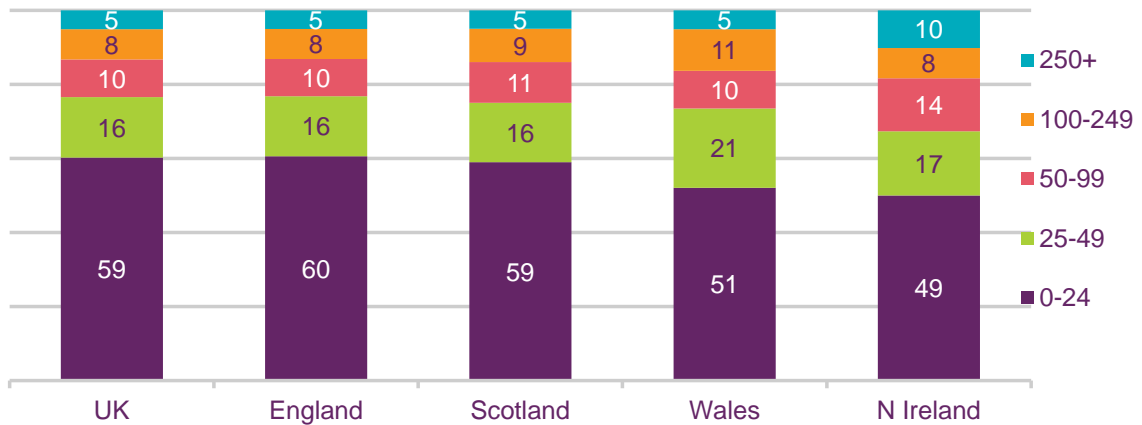
6.6 Sending and receiving post – business customers

Almost two in ten business customers in Northern Ireland send over 100 letters each month, the highest of all the UK nations

Post plays a mainly administrative role in almost six in ten (57%) of businesses in our survey in Northern Ireland, more than the UK overall of 54%. On average across the UK, businesses in our survey are more likely to send fewer than 25 letters (59%) each month. In Northern Ireland half (49%) say they send more than this amount each month, with almost a fifth (18%) sending over 100 items each month, higher than in any other UK nation.

Figure 6.7 Average volume of letters sent each month

Proportion of respondents (%)



Source: Ofcom Business Postal Tracker, Q2 2014-Q1 2015

Base: All respondents (n = 1591 UK, 973 England, 217 Scotland, 198 Wales, 203 N Ireland)

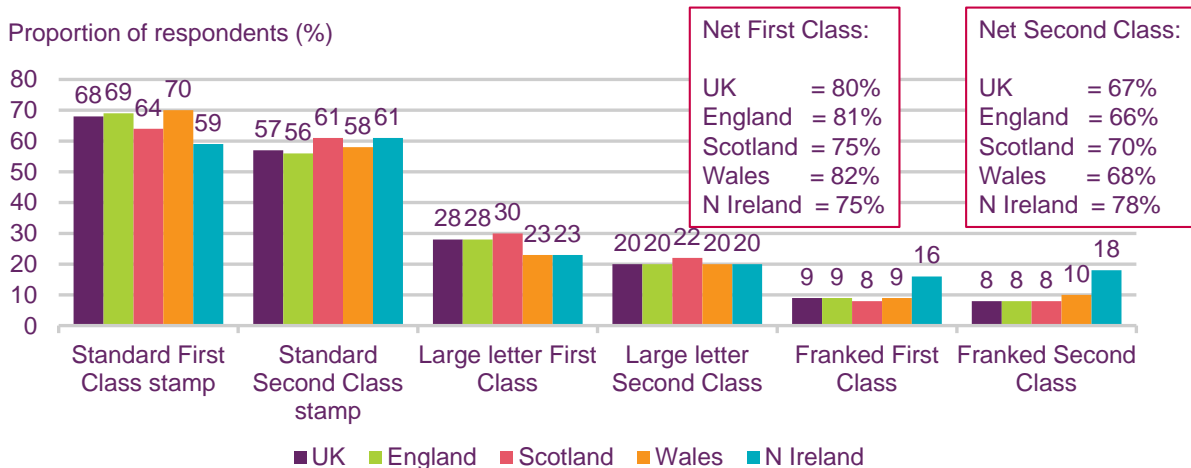
QV2a. On average, how many letter items does your organisation send per month? Please think only about all the letters and large letters you may send as an organisation.

Businesses in Northern Ireland are the most likely to use Second Class services for their standard and franked post

Standard Second Class postage is the most-used service for sending post by the businesses we surveyed in Northern Ireland; six in ten (61%) of respondents used this product. This is in contrast to the rest of the UK, where standard First Class stamps are more likely to be used (68% for UK vs. 59% for Northern Ireland). Over three-quarters (78%) of our respondents in Northern Ireland said they used any form of Second Class service, compared to two-thirds (67%) across the UK as a whole.

Figure 6.8 Royal Mail services used to send standard post each month

Proportion of respondents (%)



Source: Ofcom Business Postal Tracker, Q2 2014-Q1 2015

Base: All respondents using RM standard delivery services (n = 1493 UK, 916 England, 205 Scotland, 182 Wales, 190 N Ireland)

QV6d. Which, if any, of the following Royal Mail services does your organisation use to send your standard mail?

Businesses in Northern Ireland are the most likely have switched some of their mail to other communications methods in the past 12 months

When asked about their use of other communications methods such as email, seven in ten SMEs in Northern Ireland have switched some post to these methods over the past 12 months. This compares to 63% in the UK overall.

Figure 6.9 Switched some mail to other communications methods in the past 12 months



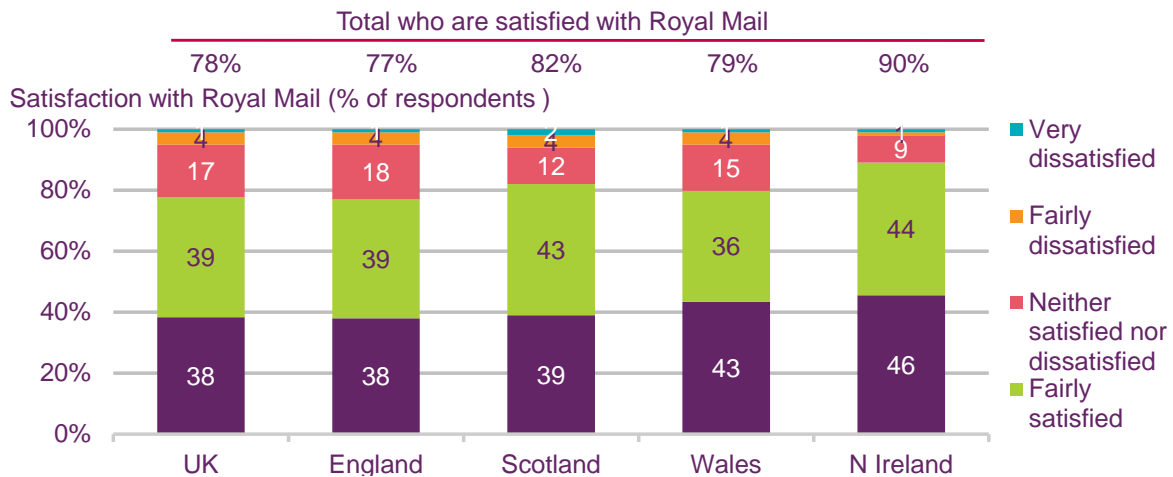
Source: Ofcom Business Postal Tracker, Q2 2014-Q1 2015

Base: All respondents (n = 1591 UK, 973 England, 217 Scotland, 198 Wales, 203 N Ireland) QF4. Over the last 12 months has your organisation moved some mail to other communications methods?

Businesses in Northern Ireland are the most likely to be satisfied with the service they receive from Royal Mail

When asked about the quality of the service they receive from Royal Mail, both as a sender and as a recipient, 90% of businesses in Northern Ireland say they are satisfied, the highest of all the nations. The proportion that are 'very satisfied' in Northern Ireland (46%) is also higher than in any other nation.

Figure 6.10 Overall satisfaction with the quality of service from Royal Mail



Source: Ofcom Business Postal Tracker, Q2 2014-Q1 2015

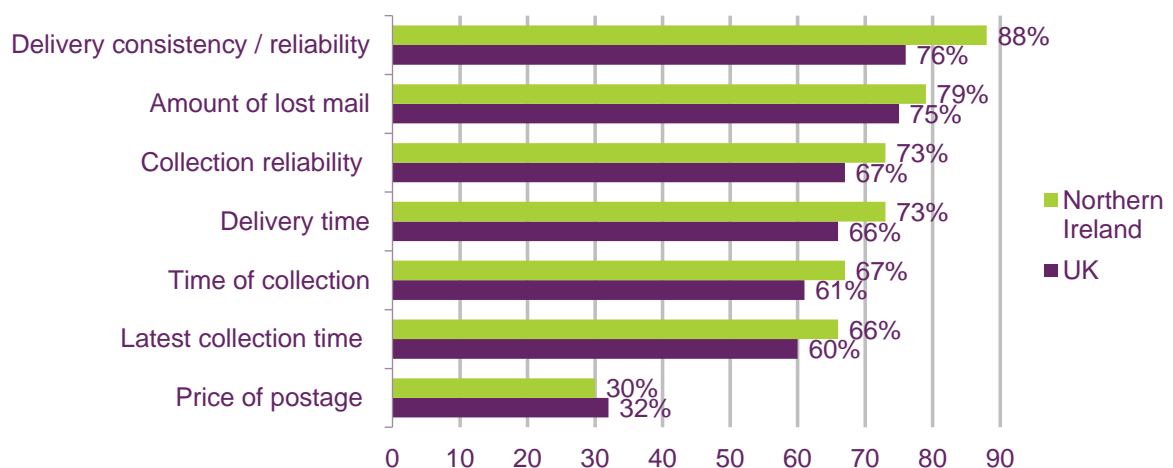
Base: All respondents who use Royal Mail (n = 1563 UK, 958 England, 213 Scotland, 195 Wales, 197 Northern Ireland)

QRM2. Thinking generally about the service your organisation receives as a whole, on a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied, how satisfied are you with the overall quality of the services you receive from Royal Mail as a recipient and sender?

Businesses in Northern Ireland are the most likely to be satisfied with the reliability of deliveries and collections

Considering specific aspects of the postal service, Figure 6.11 shows that businesses in Northern Ireland are much more likely than the UK average to be satisfied with most aspects of the postal service. However, the cost of postage is an exception. Businesses in Northern Ireland are slightly less satisfied than the UK average with the cost of postage (30% vs 32%).

Figure 6.11 Satisfaction with specific aspects of Royal Mail's service



Source: Ofcom Business Postal Tracker, Q2 2014-Q1 2015

Base: All respondents who use Royal Mail (n = 1422 UK, 197 Northern Ireland)

QRM3: How would you rate the performance of Royal Mail, as a recipient and sender, in the following areas on a 5-point scale where 1 is very dissatisfied and 5 is very satisfied?

Ranked by satisfaction levels in Northern Ireland