

2 Television and audio-visual content

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2.1 Recent developments in Northern Ireland

BBC increases investment in Northern Ireland

The BBC announced in April 2017 that it would invest an additional £11m in Northern Ireland over the next three years.

The money will be spent on:

- an enhanced digital service from BBC News NI, with improved news coverage throughout the day and weekends;
- greater coverage of local sport online, including live streaming of events across a range of sports;
- a 50% increase in commissioning spend on local television content – more drama, comedy and factual programmes and events on BBC One Northern Ireland;

- new digital content and services for younger audiences and new digital investment in radio; and
- new content to mark major historical anniversaries in Northern Ireland.

The funding equates to about 7% in additional spending over 2016 levels. BBC Director-General Tony Hall said: “It will transform our digital output – for news and sport and more. It means more drama, factual and comedy content – all things we know the public love and want from the BBC.”

The BBC also renewed its partnership agreement with Northern Ireland Screen in April 2017. Among the successes of the first agreement, signed in 2015, were dramas *Line Of Duty* and *The Fall*.

This second partnership agreement will commit the BBC to spend a minimum of 3% of its network television budget in Northern Ireland.

Under the agreement, the BBC and Northern Ireland Screen will continue to jointly fund Irish-language and Ulster-Scots programming.

Channel 4 commissioning in the nations

Channel 4 has an obligation to commission 3% of its output, measured by value and volume, from producers in the UK outside of England. This figure will rise to 9% in 2020.

In 2016 Channel 4 spent 8.5% of its commissioning budget in the devolved nations. The breakdown by nation was Scotland (5.2%), Wales (2.8%) and Northern Ireland (0.5%).

By volume of programming, Channel 4 commissioning in the devolved nations amounted to 9.2% of the total number of hours broadcast in 2016. The breakdown by nation was Scotland 6.3%, Wales 2.4% and Northern Ireland 0.5%.

2.2 Television platform take-up in Northern Ireland

In 2017, satellite television was the most widely-used main television service in Northern Ireland.

Half of all households in Northern Ireland have satellite television as their main TV platform; this continues to be higher than in the UK overall

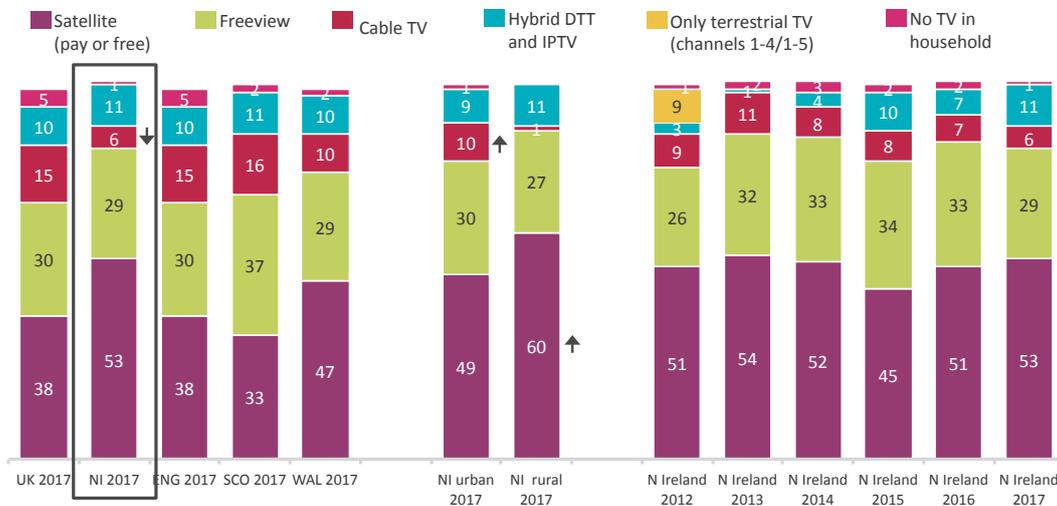
Freeview was the next most popular service, while one in ten adults nominated Hybrid DTT and IPTV (such as BT TV, EE TV, etc).¹ Take-up is unchanged since 2016 for each service.

Take-up of satellite TV is higher in rural areas of Northern Ireland (60% vs. 49% in urban areas) and take-up of cable services is

higher in urban areas (10% vs. 1% rural), probably due to its lower availability in rural locations.

Compared to the UK overall, penetration of satellite TV is higher in Northern Ireland, although households in Northern Ireland are less likely than in the UK overall to have cable TV, or no TV at all.

Figure 2.1: Main television set share, by platform



Source: Ofcom Technology Tracker, Half 1 2017

Base: All adults aged 16+ (n = 3743 UK, 493 Northern Ireland, 2245 England, 510 Scotland, 495 Wales, 251 Northern Ireland urban, 242 Northern Ireland rural, 508 Northern Ireland 2012, 507 Northern Ireland 2013, 499 Northern Ireland 2014, 504 Northern Ireland 2015, 507 Northern Ireland 2016, 493 Northern Ireland 2017)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Northern Ireland and UK in 2017, between Northern Ireland urban and rural in 2017 and at the 99% confidence level between Northern Ireland 2016 and 2017

QH1B: Which of these do you consider is your main type of television?

Note: Remaining percentages are Don't know responses

¹These are hybrid services that provide the bulk of their channels via the DTT platform and offer additional channels and functionality through a broadband connection (such as access to online video services and programme recordings). Now TV offers this through its TV Smart Box and also provides access to channels and content libraries directly through its website and App

Six in ten TV households in Northern Ireland have Pay TV, less than in 2016 and in line with the UK overall

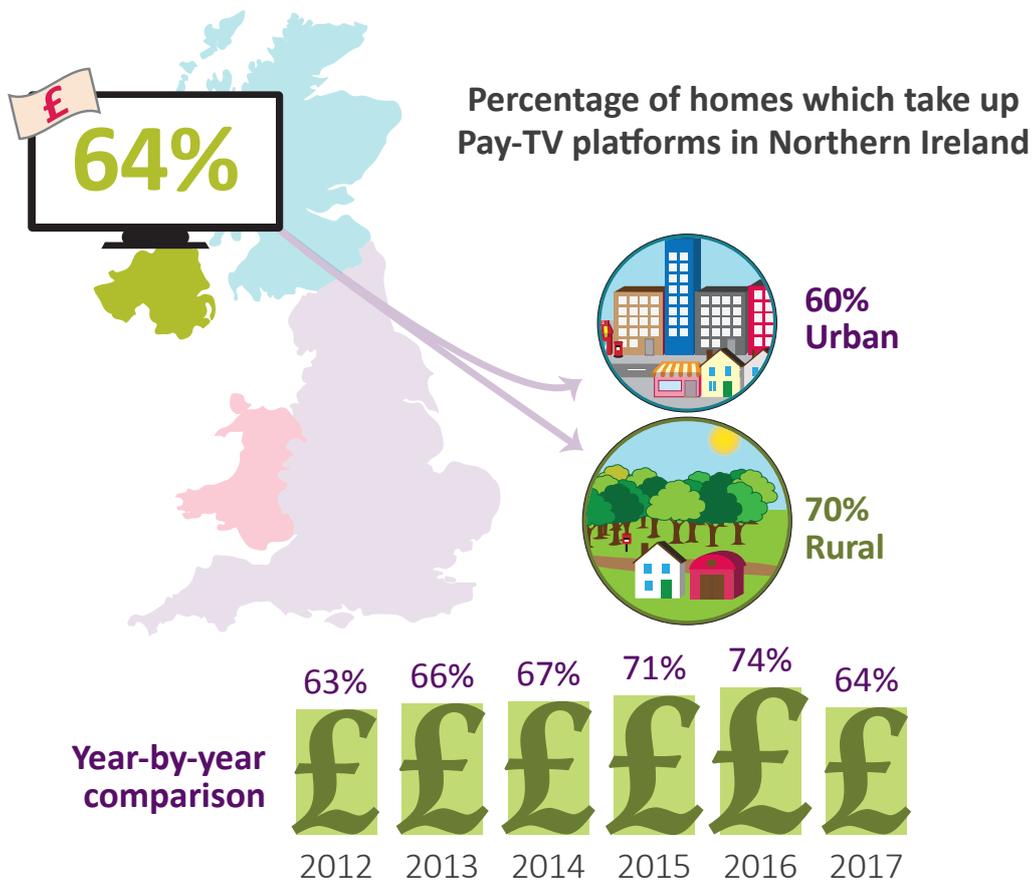
In 2017, more than six in ten (64%) households in Northern Ireland (with a television set) had Pay TV.¹

This has fallen from 74% in 2016, with the decrease particularly evident in urban areas, where Pay-TV take-up has fallen from 76% in 2016 to 60% a year later.

Households in Northern Ireland are as likely as the UK overall to have Pay TV.

Take-up of Pay TV is significantly higher in rural than in urban areas of Northern Ireland.

Figure 2.2: Proportion of homes with free and pay television



Source: Ofcom Technology Tracker, Half 1 2017

Base: All adults aged 16+ with a TV in household (n = 3564 UK, 483 Northern Ireland, 2109 England, 496 Scotland, 476 Wales, 246 Northern Ireland urban, 237 Northern Ireland rural, 508 Northern Ireland 2012, 492 Northern Ireland 2013, 488 Northern Ireland 2014, 462 Northern Ireland 2015, 496 Northern Ireland 2016, 483 Northern Ireland 2017)

QH1A: Which, if any, of these types of television does your household use at the moment?

¹ 'Free TV' refers to households that only receive Freeview or only receive Freesat satellite TV. 'Pay TV' refers to all other types of television service.

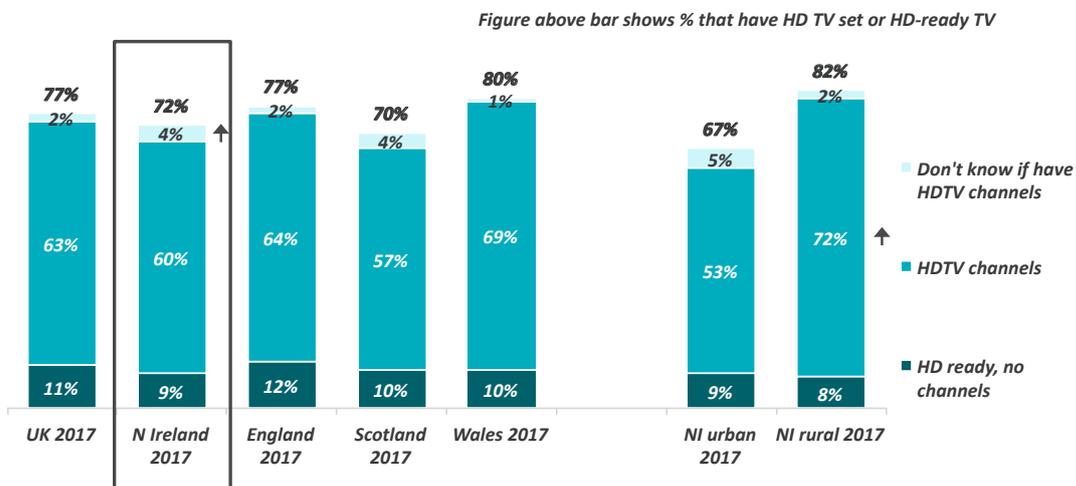
Seven in ten TV households in Northern Ireland have an HDTV set, in line with the UK overall

Among households in Northern Ireland with a TV set, 72% claimed to have either HDTV services or an HD-ready television set. Most (60%) of the TV-owning households in Northern Ireland said they receive HDTV services, with a further 9% claiming to have an HD-ready TV, but not receiving HD services.

Each of these incidences are in line with the UK overall. As HDTV channels are now available through all television platforms, including Freeview, it may be that many households are receiving HDTV services but are not aware of it.

In Northern Ireland, those in TV households in rural locations are more likely than those in urban locations to receive HD services, resulting in a higher overall incidence of having an HDTV set.

Figure 2.3: Awareness of receiving HD television



Source: Ofcom Technology Tracker, Half 1 2017

Base: All adults aged 16+ with a TV in the household (n = 3564 UK, 496 Scotland, 2109 England, 476 Wales, 483 Northern Ireland, 251 Scotland urban, 245 Scotland rural)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Northern Ireland and UK in 2017 and between Northern Ireland urban and rural in 2017

QH53: Is the main TV in your household an HDTV set or HD ready?/ QH54: Although you have an HDTV-ready set, to actually watch TV channels and programmes that are broadcast in high definition, you need an HD set-top box or a TV with built-in HDTV receiver. For the main TV set, does your household have an HDTV service?

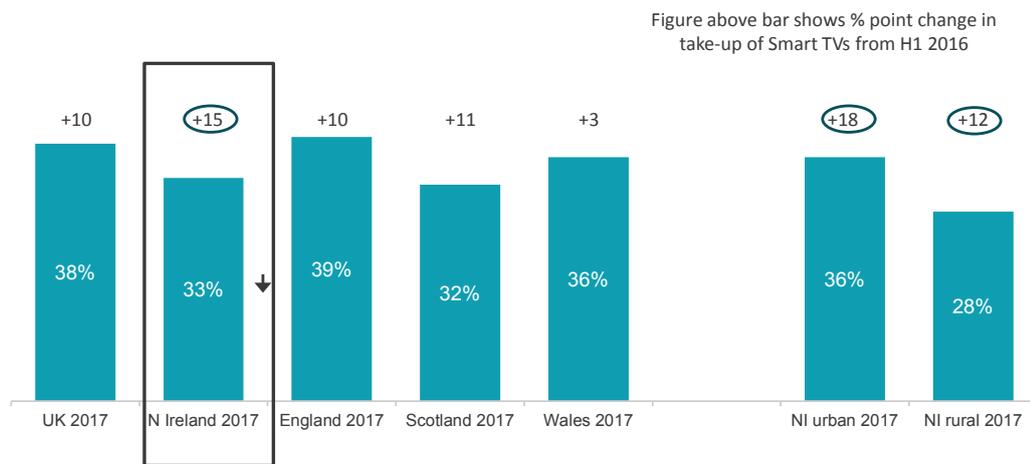
One-third of TV households in Northern Ireland have a smart TV, lower than the UK average

Among those in Northern Ireland with a TV set in the household, 33% claimed to have a smart TV (i.e a television set that can connect directly to the internet, for example to watch on-demand services such

as those available through the BBC iPlayer); lower than the UK average of 38% but almost double the 2016 measure for Northern Ireland (18%). The increase in smart TV ownership since 2016 is evident in both urban

Northern Ireland (up 18 percentage points to 36%) and rural Northern Ireland (up 12 percentage points to 28% in 2017). The difference in ownership by location in 2017 was not statistically significant.

Figure 2.4: Smart TV take-up



Source: Ofcom Technology Tracker, Half 1 2017

Base: All adults aged 16+ with a TV in the household (n = 3564 UK, 483 Northern Ireland, 2109 England, 496 Scotland, 476 Wales, 246 Northern Ireland urban, 237 Northern Ireland rural)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Northern Ireland and UK in 2017 and between Northern Ireland urban and rural in 2017. Circles around the +/- figures above the chart indicate any significant difference at the 99% confidence level between 2016 and 2017 for Northern Ireland, urban and rural.

QH62: 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.

Four in ten adults in Northern Ireland watch programmes or films on demand, mostly through catch-up services

Four in ten adults in Northern Ireland¹ watch online TV programmes or films on any type of device (compared to 55% for the UK overall), and 27%² have done so in the past week.

Watching online through live or catch-up broadcast services (e.g. BBC iPlayer, ITV Hub) is the most popular method of on-demand

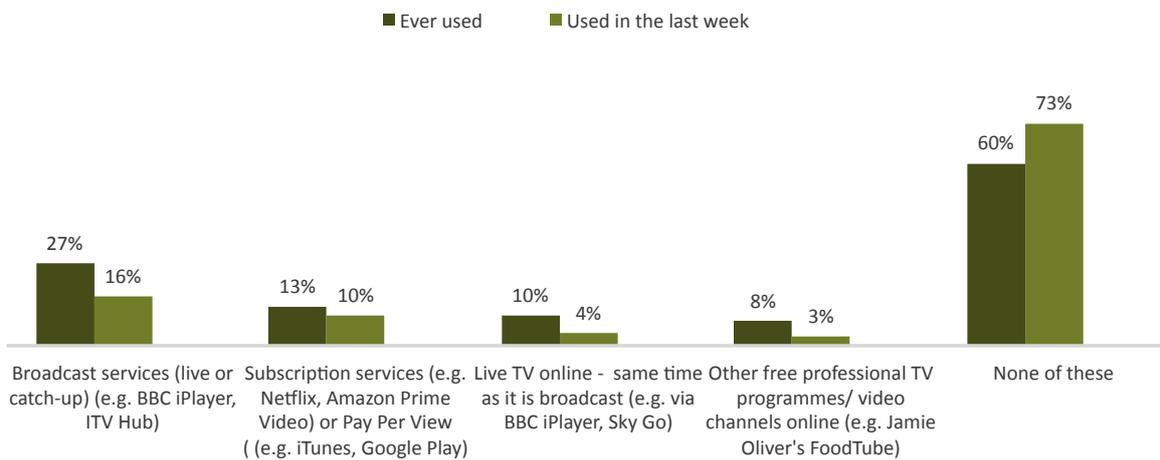
viewing in Northern Ireland; with a quarter (27%) of adults using catch-up services and most of these (16%) having used these services in the past week.

The next most-used on-demand service is watching through subscription services such as Netflix or Amazon Prime Video, or pay-per-view services such as

iTunes or Google Play, used by 13% overall and in the past week by almost all of these (10%).

One in ten adults in Northern Ireland have watched live TV online, with a similar proportion (8%) having used other free professional TV programmes or video channels online, such as Jamie Oliver’s FoodTube.

Figure 2.5: Watching TV programmes and films on the internet, on any device



Source: Ofcom Technology Tracker, Half 1 2017

Base: All adults aged 16+ in Northern Ireland (n = 493)

QH72: Do you use any of the following types of services to view online TV programmes or films via any type of device (including a mobile phone, tablet or TV set)?/ QH73: And which of these types of services, if any, have you used in the past week?/ QR1A/H: Does your household have Sky+/ Sky Q?/ QR1B: Does your household have Virgin TiVo or V+?/ QR1C/D/E: Does your Freesat/ Freeview box of Freeview TV/ broadband TV service allow you to record and store TV programmes, and also pause and rewind live TV programmes?

¹ This measure is the inverse of the 60% shown in Figure 2.5 for None of these 'Ever used'

² This measure is the inverse of the 73% shown in Figure 2.5 for None of these 'Used in the last week'

2.3 Broadcast television content

<p>Definitions</p> <p>Broadcast TV viewing</p> <p>BARB analysis is based on viewing of scheduled TV programmes such as those listed in TV listings</p>	<p>magazines or on electronic programme guides (EPGs) on TV sets in homes. This broadcast TV viewing includes programmes watched on the TV set at the time of broadcast, recordings</p>	<p>of these programmes such as through a DVR, or viewing of these programmes through catch-up player services, up to seven days after they were televised.</p>
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Channel group definitions				
	PSB portfolio channels			
Main five PSB channels	BBC Portfolio	ITV portfolio	Channel 4 portfolio	Channel 5 portfolio
BBC One	BBC Four	ITV/STV/UTV/ ITV Wales +1	Channel 4+1	Channel 5+1
BBC Two	BBC News	ITV2	E4	5STAR
ITV/STV/UTV/ITV Wales	BBC Parliament	ITV3	Film4	5USA
Channel 4	CBBC	ITV4	More4	My5
Channel 5	CBeebies	ITVBe	4Music	Spike
	BBC red button channels	ITV Encore	4seven	
		CITV		

Channels include HD variants where applicable. PSB portfolio channels include +1 variants.

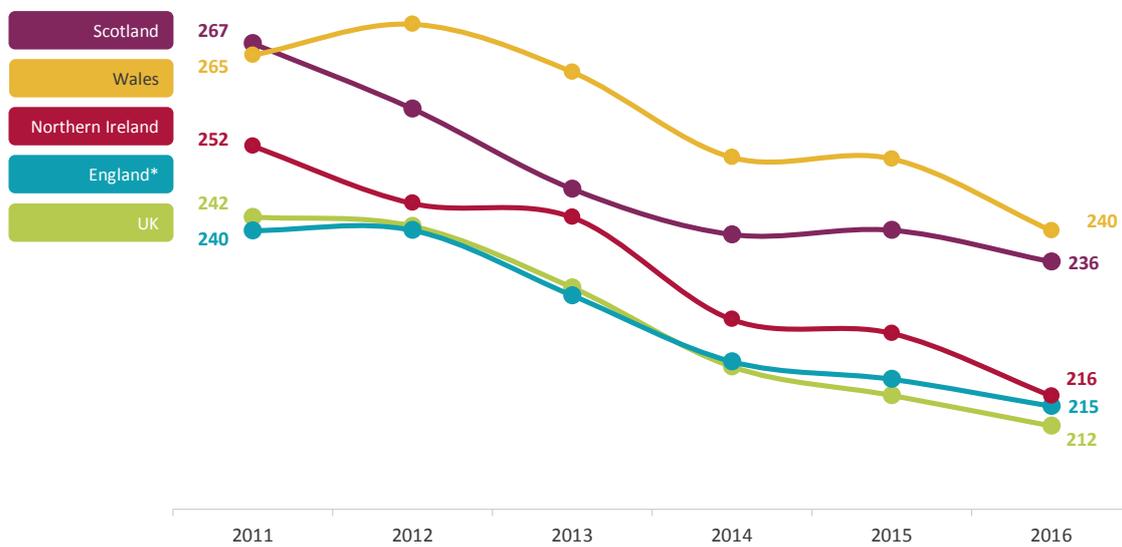
On average, people in Northern Ireland spend 216 minutes per day watching television

In 2016, people in Northern Ireland spent an average of 3 hours 36 minutes per day watching television, similar to people in England and the UK average, but less than people in Wales and Scotland.

In the longer term, daily viewing time has decreased in all nations and in the UK; the largest absolute (-36 minutes a day) and proportional (-14%) declines between 2011 and 2016 were in Northern Ireland.

The smallest falls over the same period were in England and Wales. Since 2015, viewing has fallen by 4% in Northern Ireland and Wales, compared to a 2% decrease in the other nations and the UK average.

Figure 2.6: Average minutes of television viewing per day, by nation: 2011-2016



Source: BARB, individuals (4+).

*Note: Figures reflect the average across the English regions.

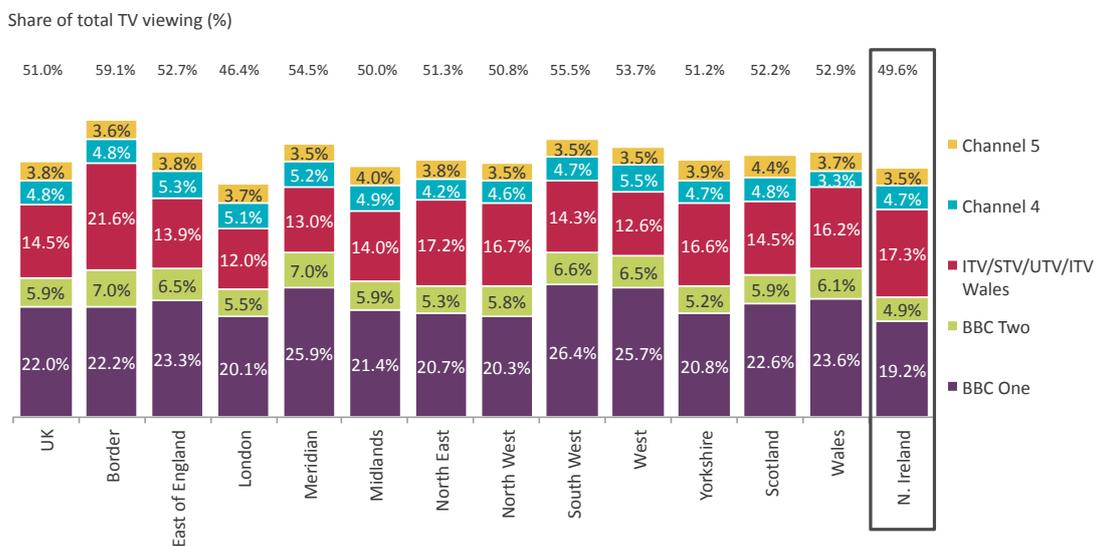
The PSB's share of viewing is lowest in Northern Ireland

In 2016, the main five PSB channels accounted for a combined 49.6% share of total TV viewing in Northern Ireland. Viewing of the main PSB channels is marginally lower than in the other UK nations and regions.

Northern Ireland was the only nation in which the share of the main five PSB channels was less than half of all viewing. BBC One and Two had lower shares in Northern Ireland than in any other UK nation or region.

However, UTV's viewing share was higher in Northern Ireland than the UK average for channel 3 and one of the highest across all nations and regions, with the exception of the Border region.

Figure 2.7: Share of the main five PSB channels, by UK nations and regions: 2016



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.

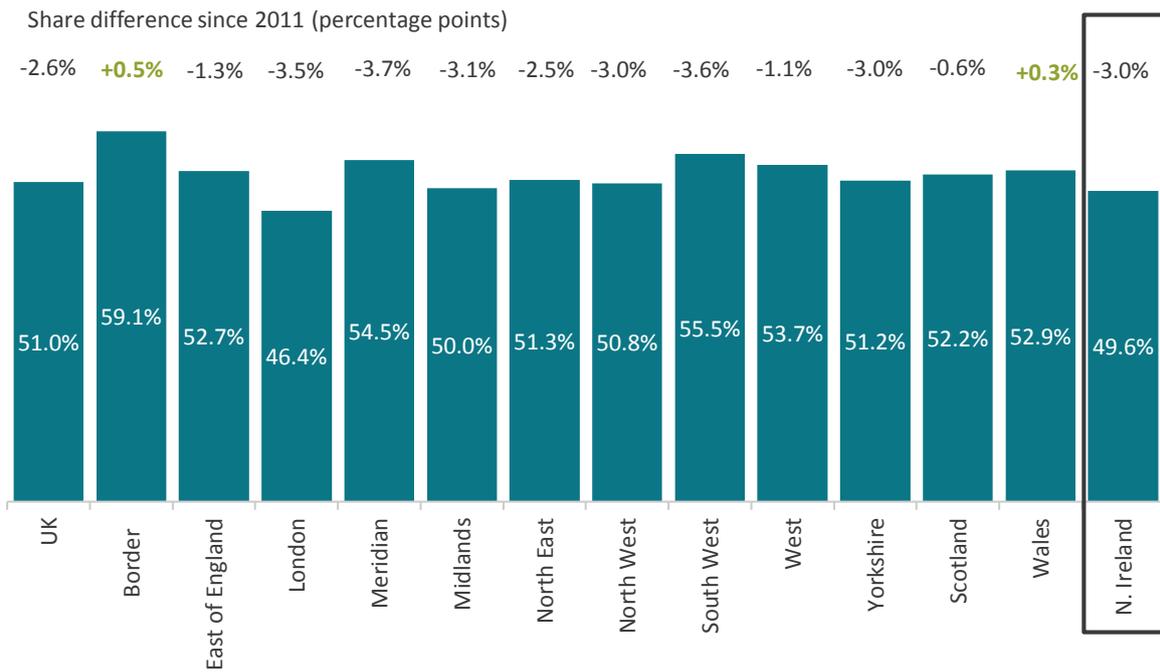
The combined share of the main five PSB channels has fallen in the past five years

Between 2011 and 2016 there was a 3 percentage point (pp) fall in the combined audience share of the main five PSB channels in Northern

Ireland. This decline was higher than in Scotland and in the UK as a whole. Of the devolved nations, Wales was the only country in which

the combined share of the main five PSBs went up, and Border the only region where this happened.

Figure 2.8: Combined share of the main five PSB channels: 2011 and 2016



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

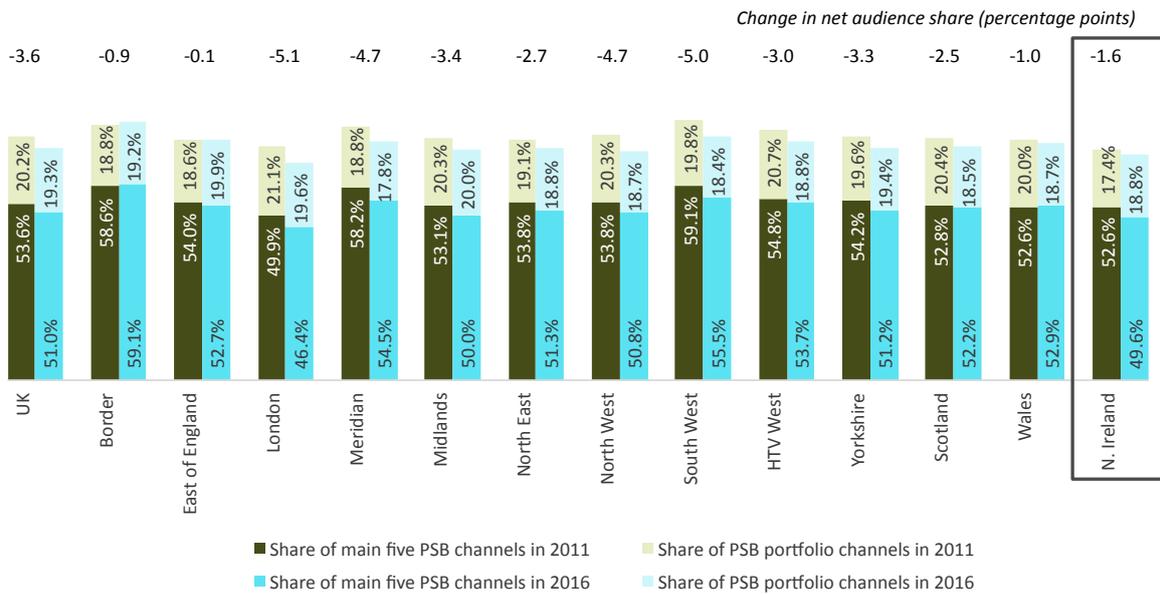
The PSB portfolio channels have increased their share of viewing in Northern Ireland since 2011

While the main five PSB channels' share of viewing decreased, the PSB portfolio channels increased their share of viewing in Northern

Ireland by 1.4pp between 2011 and 2016. This resulted in the overall net share of the main PSBs and their portfolios of channels falling

by 1.6pp. This fall was greater in Northern Ireland than in Wales, but smaller than the overall decline in Scotland and the UK as a whole.

Figure 2.9: Net change in the audience share of the main five PSB channels and their portfolios of channels: 2011 and 2016



Source: BARB, individuals 4+. Note: Numbers may not add to 100% due to rounding.

The Secret attracted the largest audience in Northern Ireland in 2016

The penultimate episode of *The Secret*, UTV's four-part crime drama series, was the most-watched episode of the series and the most popular programme in Northern Ireland overall in 2016. It drew an average audience of 490,000 viewers, representing 28.9% of the population of Northern Ireland and

a 58.4% share of total TV viewing in the slot in which it was shown.

In a UEFA European championships year, six of the top 20 programmes were televised matches, with the Wales vs. Northern Ireland match the second-most-watched programme in 2016.

Entertainment programmes were also popular, as were soaps *Coronation Street* and *Emmerdale*. The BBC One Northern Ireland programme *A Nolan Show Investigation* ranked 20th, the only current affairs programme in the top 20 list of programmes.

Figure 2.10: Top 20 programmes in Northern Ireland: 2016

Programme	Channel	Date	Average 000s	TVR %	Share %
The Secret	ITV	29/04/2016	490	28.9	58.4
Euro 2016: WAL v NIR	BBC One	25/06/2016	447	26.3	76.4
Euro 2016: NIR v GER	BBC One	21/06/2016	427	25.1	69.9
I'm A Celebrity- Get Me Out Of Here!	ITV (SD+HD)	13/11/2016	404	23.8	49.3
Euro 2016: POL v NIR	BBC One	12/06/2016	399	23.5	64
Euro 2016: Post Match	BBC One	25/06/2016	391	23	67
Britain's Got Talent	ITV	16/04/2016	370	21.8	54.2
Coronation Street	ITV	08/02/2016	355	20.8	44.6
Emmerdale	ITV	08/02/2016	353	20.7	46.4
The Great British Bake Off	BBC One	26/10/2016	339	19.9	45.8
Planet Earth II	BBC One	27/11/2016	328	19.3	39.5
Strictly Come Dancing: The Final	BBC One	17/12/2016	324	19.1	48.2
New Year's Eve Fireworks	BBC One	31/12/2016	324	19.1	53.2
The X Factor	ITV	03/09/2016	323	19	49
Mrs Brown's Boys Live	BBC One	23/07/2016	322	19	50.9
Mrs Brown's Boys Christmas Special	BBC One	25/12/2016	317	18.7	45
Euro 2016: POR v FRA	BBC One	10/07/2016	310	18.3	44.1
Mrs Brown's Boys	BBC One	01/01/2016	307	18	45
Euro 2016: GER v ITA	BBC One	02/07/2016	303	17.8	51.3
A Nolan Show Investigation	BBC One	15/12/2016	302	17.8	57.8

Source: BARB, individuals 4+, based on the single best performing episode of a programme title ranked on average audience 000s. Filtered on programmes with a minimum duration of 10 minutes. **Note:** Reporting of programmes against UTV HD was available from October 2016 in BARB. UTV programmes therefore include the SD variant only, as well as the combined SD+HD. BBC One includes HD.

Regional news and HD channels

Channel 3/ITV

ITV does not currently broadcast HD variants of its regional news programmes for all of its regions. This means that for some areas, an out-of-region HD version of regional news is shown on the ITV HD channel. London, Meridian, Wales, Central, Granada, STV* and UTV** currently offer the

HD service across all platforms, while Anglia, Yorkshire and Tyne Tees offer it on some platforms only.^ In the remaining areas, the regional news shown on the HD channel is not the regional news for that region (e.g in Border, the Granada news feed is shown). The chart below includes all viewing to any early evening news programming, even if it is not the relevant one to the area.

BBC One

There are BBC One HD channels for Scotland, Wales and Northern Ireland which show regional news in HD. At the moment, BBC One HD in the English regions cannot show local news (a message prompts viewers to turn over to BBC One during the regional news slot). The chart below reflects viewing of the early evening news on BBC One HD where available.

*The Glasgow regional news is shown.

** UTV started reporting programme logs to the HD channel from mid-October 2016 and therefore the HD element is only included from this date.

^On 31 March 2016 ITV launched these regions in HD on Sky and Freesat (Freeview and Virgin Media pending)

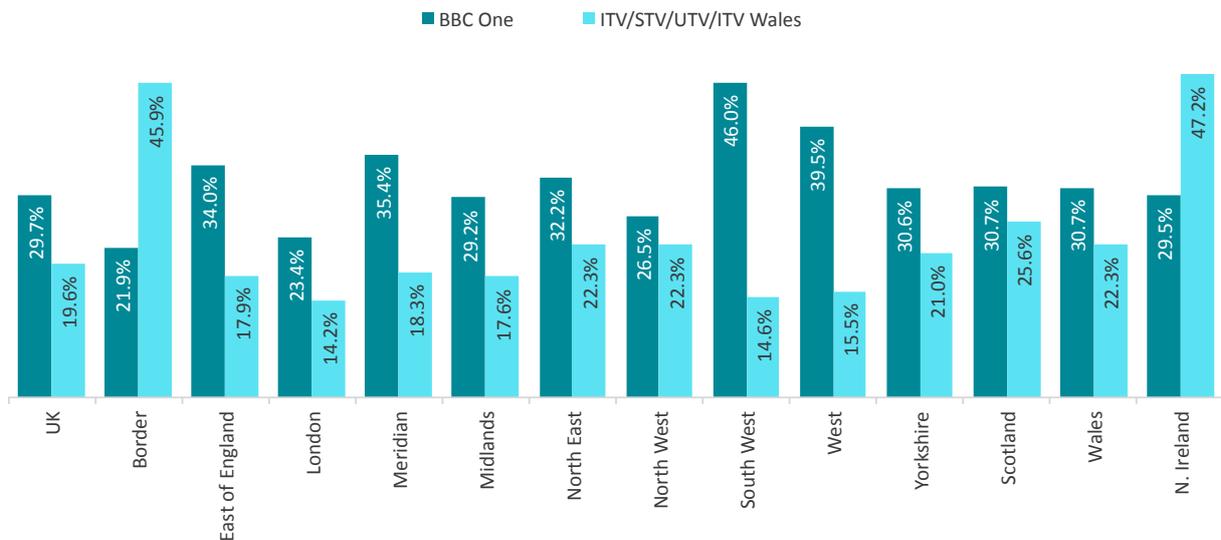
UTV’s early evening news bulletin attracts a greater share in Northern Ireland than the UK average for the same slot

UTV’s early-evening news bulletin, UTV Live, attracted a 47.2% average share in Northern Ireland between 6pm and 6.30pm, more than double channel 3’s UK average for early-evening news bulletins in the same slot.

This was markedly higher than in all other UK nations and regions, apart from Border, which achieved a broadly similar viewing share. BBC One’s counterpart bulletin in Northern Ireland, BBC Newline, attracted a lower average share

(29.5%) between 6.30pm and 7pm. This is in line with the BBC early evening news bulletin across the UK as a whole.

Figure 2.11: BBC One and ITV/ STV/ UTV/ ITV Wales early evening news bulletin shares: 2016



Source: BARB, individuals (4+). HD viewing included where applicable (see methodology box above). Note: Early evening (‘local’) news bulletin figures based on ‘regional news’ genre programmes, start time 17:55-18:35, 10mins+ duration, weekdays. UK figures based on share to respective early evening news bulletin time slots. 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.

TV is the main source of news for more than seven in ten adults in Northern Ireland

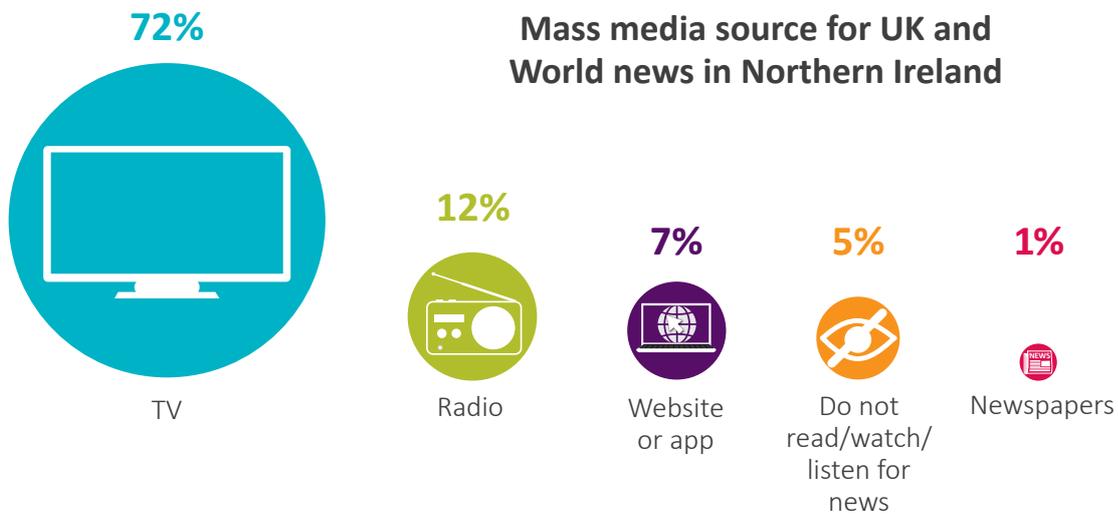
In Northern Ireland in 2016, 72% of adults aged 16 and over said that TV was their main source of UK and world news; this was the highest proportion across all

nations and notably higher than the UK average figure (56%).

Seven per cent cited websites or apps as their main source of news,¹

lower than the UK average (20%), as was the proportion in Northern Ireland who cited print newspapers as their main source (1% vs. 8% UK).

Figure 2.12: Respondents' main media source for UK and world news, by nation: 2016



Source: Ofcom Media Tracker 2016

Base: All (2,069); England (1,591); Scotland (179); Wales (144); Northern Ireland (155). Prompted, single code.

¹ These include broadcaster, newspaper, social media and other websites or apps

2.4 Viewing of Republic of Ireland channels

The two RTÉ channels remain the most-watched Republic of Ireland-originated TV channels in Northern Ireland

Before digital switchover in October 2012, RTÉ One, RTÉ2, TG4 (Irish language channel), and TV3 were available to around half of the Northern Ireland population via overspill from TV transmitters in the Republic of Ireland (RoI). Following digital switchover, RTÉ One, RTÉ2 and TG4 became available on

free-to-view to the majority of the population; the channels are broadcast from three transmitters in Northern Ireland – Brougher Mountain, Black Mountain and Carnmoney Hill. In addition, the RTÉ services and TG4 are available on Sky and Virgin Media. TV3 is still available only via overspill.

Around one in three respondents in Northern Ireland with a TV in their household claimed to watch RTÉ One (29%) or RTÉ2 (28%) on at least a monthly basis in H1 2017¹. This compares to around one in five respondents who claimed to watch TV3 and TG4 on at least a monthly basis (19% and 18% respectively).

Figure 2.13: Claimed viewing of RoI-originated TV channels in Northern Ireland



Source: Ofcom Technology Tracker, Half 1 2017

Base: All adults aged 16+ in Northern Ireland with a TV in household (n = 483)

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

Significance testing: Arrows and circles indicate any significant differences at the 95% confidence level between RTÉ channels and TV3/TG4.

¹ RTÉ, TG4, and TV3 viewing are not measured by BARB. Ofcom carries out research through its annual Tech Tracker survey to measure viewing of these channels in Northern Ireland.

2.5 TV programming for viewers in Northern Ireland

The following section outlines spend and hours of programming for viewers in Wales, Scotland, Northern Ireland and the English regions, provided by the BBC and the holders of the Channel 3 licences across the UK – ITV, STV and UTV (which was purchased by ITV in February 2016) .

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 1.5.

Historical financial figures have been adjusted for inflation using the CPI, which was particularly high in the period from 2007 to 2013. Due to the commercially sensitive nature of the data, BBC and UTV spend figures have been combined.

Definitions	First-run acquisitions	Spend on output
<p>First-run originations</p> <p>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.</p>	<p>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.</p> <p>Repeats</p> <p>All programmes not meeting one of the two definitions above.</p>	<p>Includes all costs incurred by the broadcaster associated with making or acquiring programmes. These include both direct and indirect production costs for in-house productions and licensing costs for commissioned and acquired programmes, and excludes costs related to marketing and distribution.</p>

BBC and UTV real terms spend on first-run originated content for viewers in Northern Ireland increased in 2016

In 2016, £276m 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, up by £4m in real terms year on year.⁷ However, since 2011, spend on first-run originated nations’ and regions’ output by the BBC and ITV/STV/UTV has fallen in real terms by £12m.

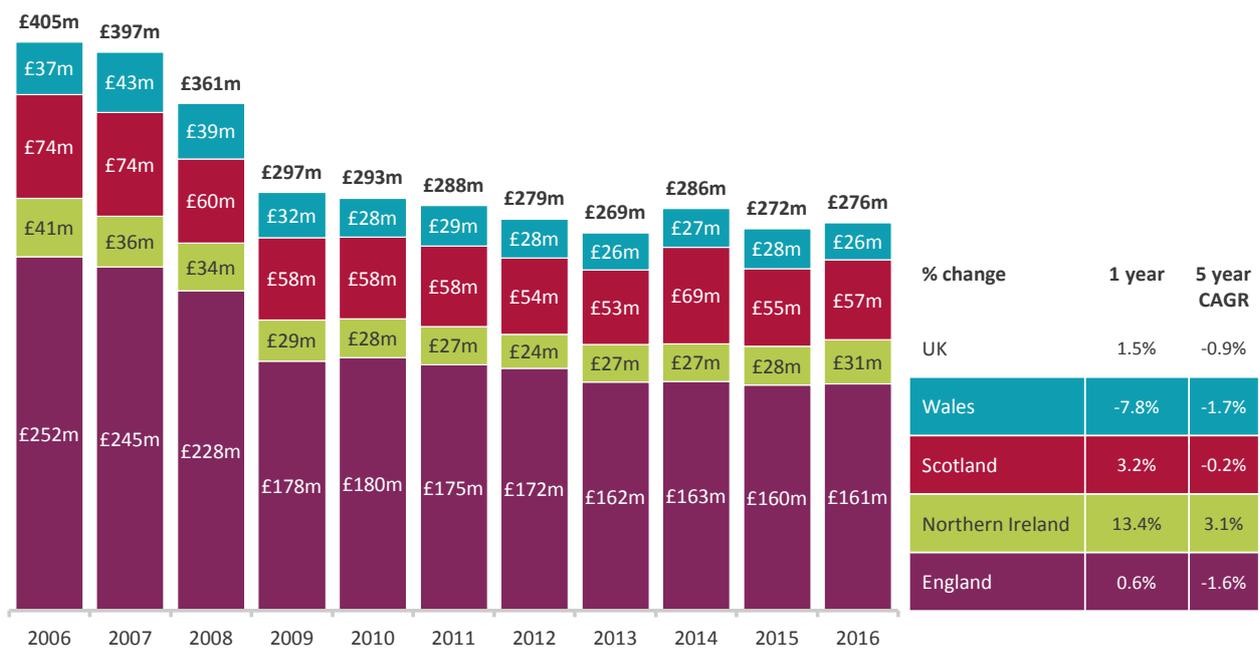
In real terms, the year-on-year spend by the BBC and UTV on first-run originated programming

for viewers in Northern Ireland increased by 13.4% to £31m in 2016. The increase in spending could be explained in part by ITV’s takeover of UTV in 2016. Prior to the takeover, UTV did not charge staff costs to their news programmes, allocating direct costs only. From 2016, ITV have allocated relevant staff costs to UTV news programming, consistent with their approach across the rest of the ITV network. Using estimated 2015 figures readjusted for this difference

in accounting, the year-on-year change in spending on first-run originated output in Northern Ireland stands at 5.8% in real terms.

This was the largest increase across any UK nation. In contrast to the overall trend across the UK nations, the compound annual growth rate (CAGR) shows that spending in Northern Ireland by the BBC and channel 3 licensees increased between 2011 and 2016, at an average of 3.1% each year.

Figure 2.14: Spend on first-run originated nations’ and regions’ output by the BBC/ ITV/ STV/ UTV



Source: Broadcasters. All figures are adjusted for inflation (2016 prices).

Note: Spend data for first-run originations only. BBC includes BBC One and BBC Two channels. Excludes spend on BBC Alba and S4C output but includes some spend on Irish-language programming by the BBC. Since 2014, spend on content by ITV Border specifically for viewers in Scotland has been assigned to Scotland, with the rest of ITV Border spend attributed to England. These figures do not include spend on network content.

The BBC and UTV spent £31m on programming for viewers in Northern Ireland in 2016

Including acquisitions and repeats, the BBC and UTV spent £31m on programming for viewers in Northern Ireland in 2016. Spend by the BBC and UTV on news

and other non-news/non-current affairs programming for viewers in Northern Ireland was at broadly the same levels with both accounting for just over 40% (£13m) of total

spend. Current affairs accounted for the lowest proportion of total spend in 2016, at around 18% (£6m).

Figure 2.15: Total spend by the BBC/ ITV/ STV/ UTV on nations'/ regions' output: 2016



Source: Broadcasters.

Note: BBC includes BBC One and BBC Two channels. 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. Scotland figures include programming for viewers of ITV Border in Scotland: 76 hours of current affairs in 2016.

Content spend has increased year on year for viewers in Northern Ireland

Including acquisitions and repeats, spend by BBC and UTV on nations' and regions' output for viewers in Northern Ireland increased by 13% in real terms between 2015 and 2016, representing a compound annual growth rate (CAGR) of 3% each year since 2011. This is in contrast to the UK wide trend, where year-on-year increases were much smaller, and there was an average decrease of 1% each year between 2011 and 2016.

In particular, spend on current affairs and news in Northern Ireland has risen. Again, the increase in spending could be explained in part by ITV's takeover of UTV in 2016, as outlined above. Using estimated 2015 figures adjusted for differences between ITV and UTV accounting methods, the year-on-year change in news spending decreases from 16% to 6% in real terms.

Spend on non-news/ non-current affairs programming for people in Northern Ireland by the BBC and UTV has also increased since 2015, by 7% in real terms. However, it has fallen by an average of 2% each year, in real terms, over the five years to 2016.

Figure 2.16: Change in total spend on nations' and regions' output, by genre and nation: 2011-2016

	UK		England		N. Ireland		Scotland		Wales	
	1yr	5yr CAGR	1yr	5yr CAGR	1yr	5yr CAGR	1yr	5yr CAGR	1yr	5yr CAGR
Current affairs	9%	2%	20%	-2%	22%	19%	-16%	2%	11%	5%
News	1%	-1%	-2%	-2%	16%	5%	9%	3%	2%	-2%
Non-news/non-current affairs	1%	-2%	36%	3%	7%	-2%	5%	-2%	-18%	-3%
Total spend in 2016	£277m		£161m		£31m		£58m		£26m	

	UK		England		N. Ireland		Scotland		Wales	
	1yr	5yr CAGR	1yr	5yr CAGR	1yr	5yr CAGR	1yr	5yr CAGR	1yr	5yr CAGR
Change in spend	2%	-1%	1%	-2%	13%	3%	4%	-1%	-8%	-2%

Source: Broadcasters. All figures are adjusted for inflation (2016 prices).

Note: BBC includes BBC One and BBC Two channels. 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 divided between England and Scotland from 2014 onwards and attributed to England only before 2014.

The number of first-run originated hours for viewers in Northern Ireland is also up on 2015

The number of first-run originated hours produced for viewers in Northern Ireland rose by 6% (58 hours) from 2015 to 2016. The largest increase was in BBC current affairs programming, with 40 more hours broadcast in 2016

than in 2015, although there were decreases in some genres; hours fell for UTV non-news/ non-current affairs (4 hours less than 2015), UTV current affairs (4 hours fewer) and BBC news (37 hours fewer).

The distribution of programmes across genres and broadcasters in Northern Ireland remains broadly the same as in 2015. News accounts for the largest number of hours in any one genre (62% of all hours).

Figure 2.17: Hours of first-run originated nations'/ regions' output, by genre and broadcaster: 2016



Source: Broadcasters.

Note: Hours data for first-run originations only. BBC includes BBC One and BBC Two channels. 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. Scotland figures include programming for viewers of ITV Border in Scotland, which was 76 hours of current affairs in 2016.

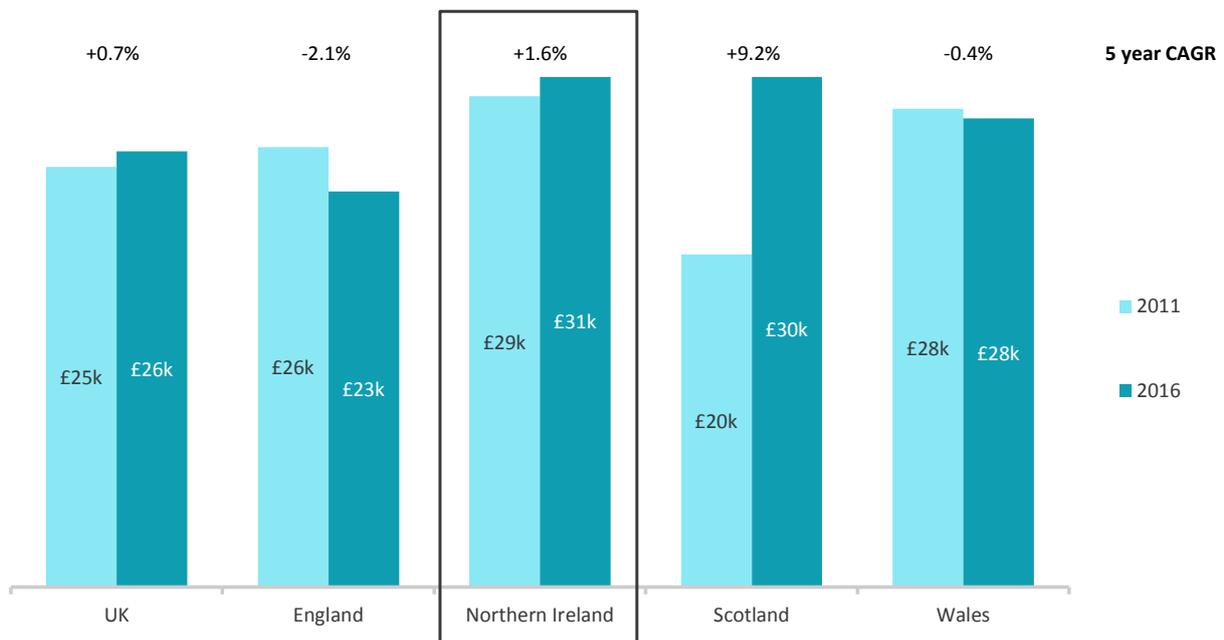
The cost per hour of first-run programming for viewers in Northern Ireland has risen since 2011

At £31,000, the cost per hour of first-run originated nations' and regions' output in Northern Ireland in 2016 was higher than the UK average (£26,000) and any other UK nation.

In real terms, over the five-year period, cost per hour has increased in Northern Ireland, rising by an average of 1.6% each year, in contrast to the UK average of 0.7%.

However, this could be related to the inclusion of staffing costs in news spend since ITV look over UTV's licence in 2016.

Figure 2.18: Cost per hour of first-run nations and regions output, by nation: 2011-2016



Source: Broadcasters. All figures are adjusted for inflation (2016 prices).

Note: BBC includes BBC One and BBC Two channels. 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. Scotland figures include programming for viewers of ITV Border in Scotland: 76 hours of current affairs in 2016.

2.6 Other programming in Northern Ireland

The Irish Language Broadcast Fund (ILBF) was launched in 2005.

The Irish Language Broadcast Fund

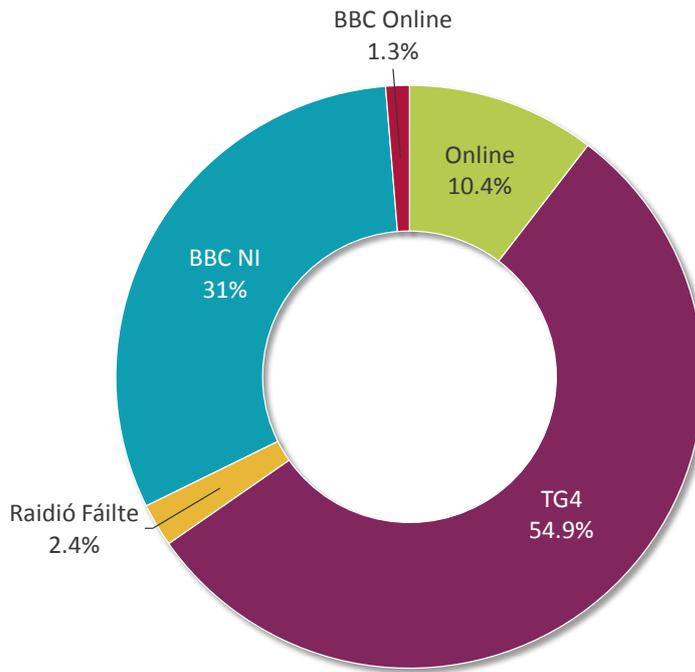
Funding comes from the UK Government’s Department of Culture, Media & Sport through the British Film Institute to Northern Ireland Screen, which manages the fund.

The first period of funding ran from 2005 to 2009. It was renewed in 2009, running until

2011 and again in 2013 for the period to 2015, with a further extension to 2016. The Fund is currently in a four-year period of funding from 2016 to 2020.

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.

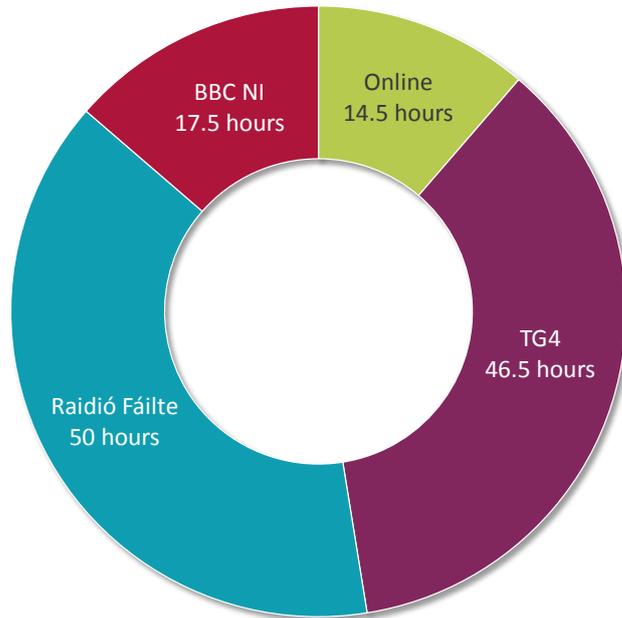
Figure 2.19: ILBF content funding recipients, by broadcaster / platform: 2016/2017



Source: Northern Ireland Screen

The ILBF also supports interactive content and, through a training programme, content on Raidió Fáilte. In the last financial year, more than £2.6m was spent on Irish language content. There were 32 recipients of funding (television production companies and Raidió Fáilte). To secure funding, these companies must be based in Northern Ireland and have a commitment from a broadcaster to show output.

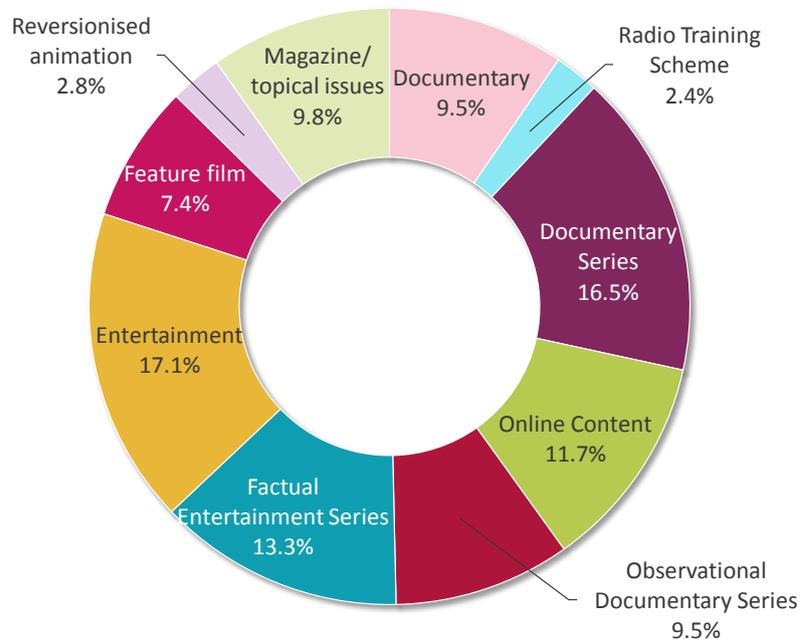
Figure 2.20: ILBF-funded hours: 2016/2017



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 interactive content.

Figure 2.21: ILBF content funding, by genre: 2016-2017



Source: Northern Ireland Screen

Programming highlights

ILBF-funded historical documentary *Eoin Mac Néill: Fear Dearmadta 1916* was nominated for a Torc at the Celtic Media Festival.

Rocky Ros Muc premiered at the Boston Irish Film Festival and won the Global Vision Award for best documentary at the festival.

Other 2016/2017 highlights include interactive content: *#Faduda*, *Meon Eile* and

Nós TV; landmark documentary *John Philip Holland & Eithne – Idir Dhá Shaol*; new discussion series *An Focal Scoir*; and entertainment series *I Lár an Aonaigh* and *Opry an Iúir*.

ILBF objectives for 2017/18 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 of £1m per year until at least 2020.

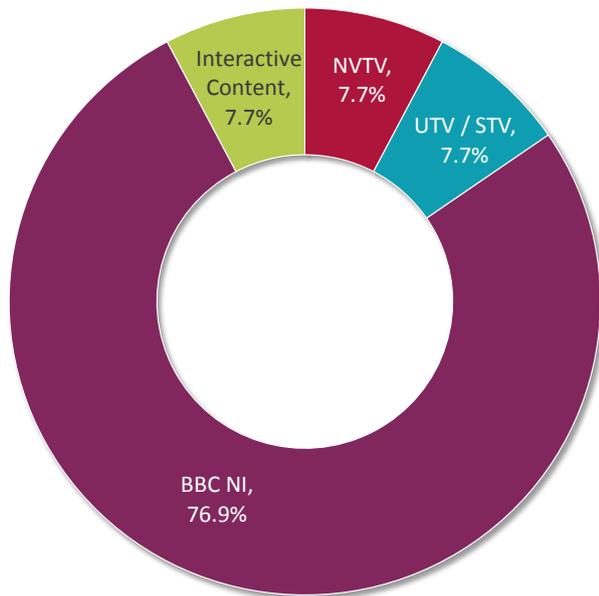
The majority of programming funded by the Ulster-Scots broadcasting fund was aired on BBC Northern Ireland in 2016/17

In 2016/17 eight awards were made, totalling 15.7 hours of production, and one award was made for interactive content.

Twelve projects were broadcast in 2016/17 including documentaries, factual entertainment series and music content. The USBF

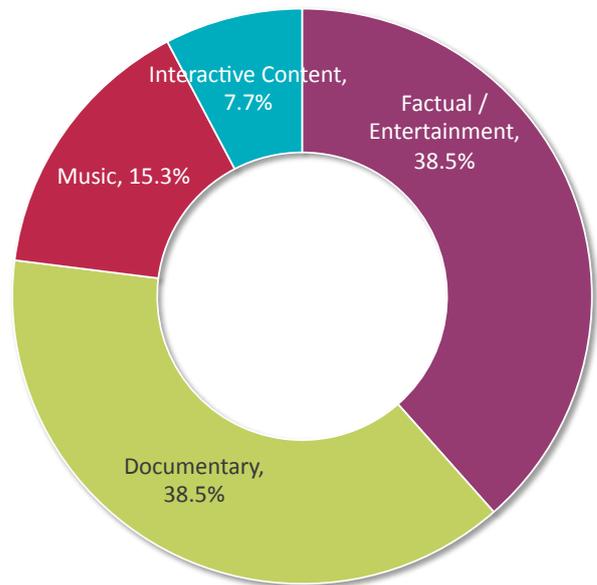
provided over £1m in funding to these programmes, which were broadcast on BBC Northern Ireland, NVTV, UTV and STV.

Figure 2.22: USBF content funding, by broadcaster: 2016-2017



Source: Northern Ireland Screen

Figure 2.23: USBF breakdown of output, by genre: 2016-2017



Source: Northern Ireland Screen

<p>Programming highlights</p> <p><i>Shaping the Coast</i> uncovered the fascinating history of the breathtaking Antrim Coast road.</p> <p><i>Paul and Nick's Big American Food Trip Series 2</i> returned and was broadcast in Northern Ireland on UTV, in Scotland on STV and in the</p>	<p>Republic of Ireland on UTV Ireland.</p> <p><i>The Call of the Pipes</i> followed two pipe bands, Thiepval Memorial and McDonald Memorial, in the run-up to the Belfast Tattoo.</p> <p>In <i>In the Shadow of the Shipyard</i>, presenter Dan Gordon explored how the history, industry and</p>	<p>streets of East Belfast influenced and helped shape the work of four ground-breaking Ulster playwrights – St John Ervine, Thomas Carnduff, Sam Thompson and Stewart Parker.</p>
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Objectives for 2017/18 include:

Following a strategic review and evaluation of the USBF, the objectives for the fund were updated, including the introduction of support for radio content and a new entrant trainee scheme.

- Deliver ten additional hours of Ulster-Scots programming in a range of genres.

- Deliver Ulster-Scots language programming (including radio programming) to a minimum value of 20% of the available USBF production budget each year.
- Deliver Ulster-Scots radio programming to a maximum of 10% of the available USBF production budget each year.
- Deliver online projects consistent with the aim of the USBF to a maximum of

10% of the available USBF production budget each year.

- Broadcast 90% of the USBF-funded programming within nine months of delivery.
- Reach a significant and initial audience target of 40,000 people in Northern Ireland. This target is an average across all the programming supported by the USBF, applied to each 12-month period.

Programming reach

During 2016-17, programming supported by the ILBF and USBF, and broadcast by BBC Northern Ireland, reached an audience of 630,000, representing 37% of the total Northern Ireland population.¹

¹ Source BBC Northern Ireland, using BARB, all individuals in Northern Ireland (age 4+) Note: This is all programming that broadcast during 2016/2017, not allocation of funding.

2.7 Network television productions made in Northern Ireland

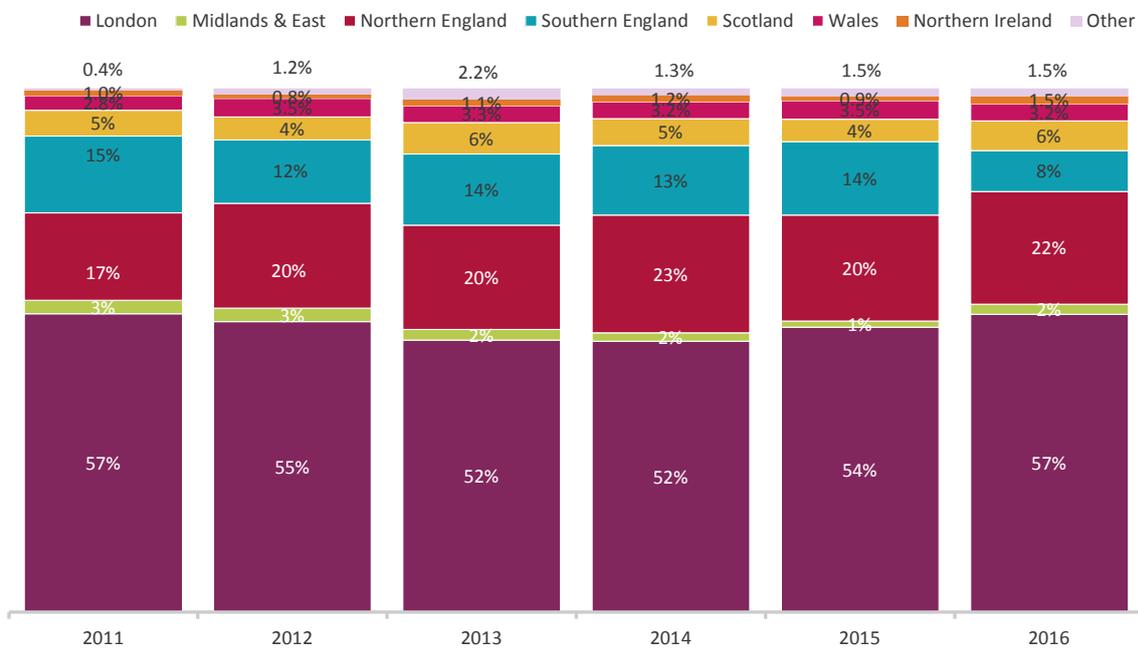
Figure 2.24 and Figure 2.25 below illustrate the proportion of UK PSB network programmes (excluding news) that were produced in the nations and regions over the past five years, by expenditure and volume respectively.

In 2016, 1.5% of PSB network spend on original content, excluding news, was on Northern Ireland productions, up from 0.9% in 2015. Such productions made up 1.0% of all non-news first-run UK-originated hours broadcast

across the PSB channels in 2016, up slightly from 0.9% in 2015.

As in previous years, the majority of such spend was in London. Fifty-seven per cent of spend on new, non-news content returned 49% of all network hours.

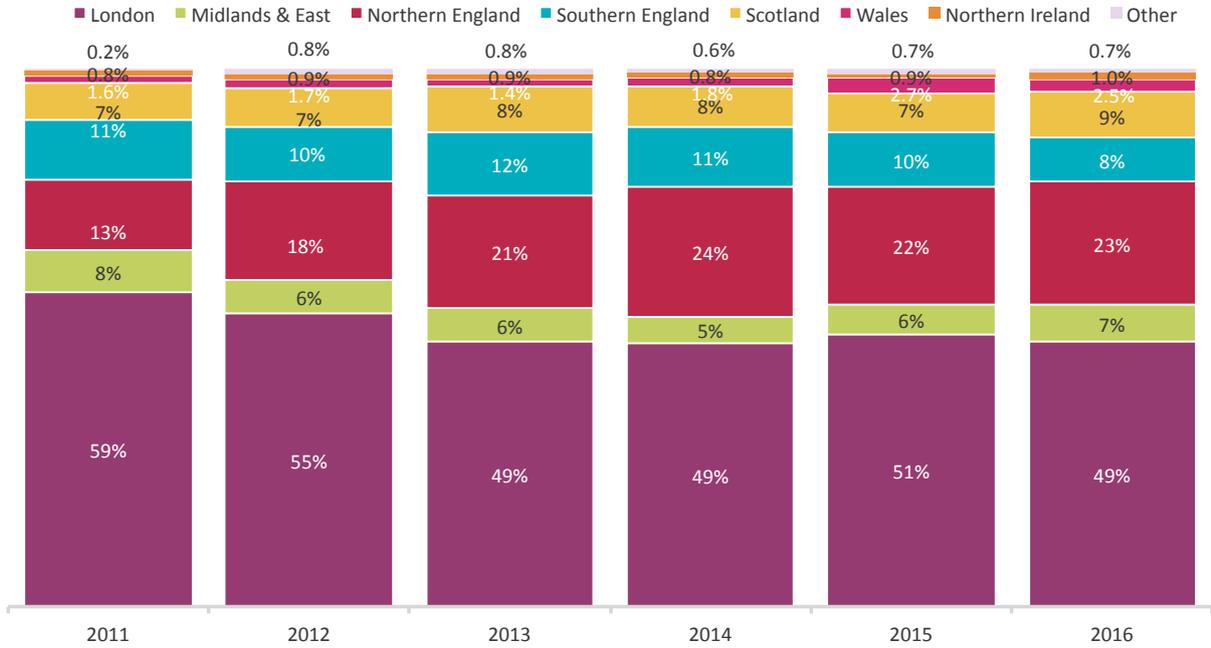
Figure 2.24: Expenditure on originated network productions: 2011-2016



Source: Ofcom/broadcasters

Note: This expenditure does not include network news production. 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. See www.ofcom.org.uk/__data/assets/pdf_file/0019/87040/Regional-production-and-regional-programme-definitions.pdf on Ofcom website for further details.

Figure 2.25: Volume of originated network productions: 2011-2016



Source: Ofcom/broadcasters

Note: These hours do not include network news production. 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. See www.ofcom.org.uk/data/assets/pdf_file/0019/87040/Regional-production-and-regional-programme-definitions.pdf on Ofcom website for further details.