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/cmrnorthernireland. Companion reports for the UK and each of the nations can be found at www.ofcom.org.uk/cmr.

Contents

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 Irelands'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 2014[1], 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 England[2], 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.

<u>TV and audio-visual content</u>

- **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%).

<u>Radio and audio content</u>

- **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.

<u>Telecoms and networks</u>

- **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%.

<u>Internet and web-based content</u>

- **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; +xxFigures havedecreased 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 friendships[3].

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 throughout[4]. All figures reported in the narrative relate to Northern Ireland unless stated otherwise.

Attitudes to online communications

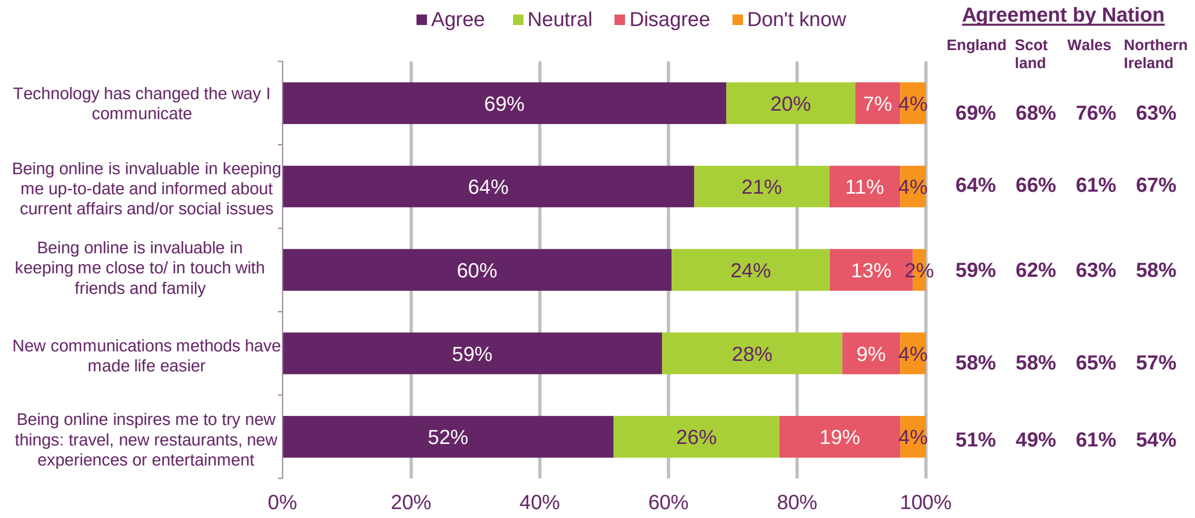
<u>Two-thirds of internet users in Northern Ireland agree that technology has changed the way they communicate</u>

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

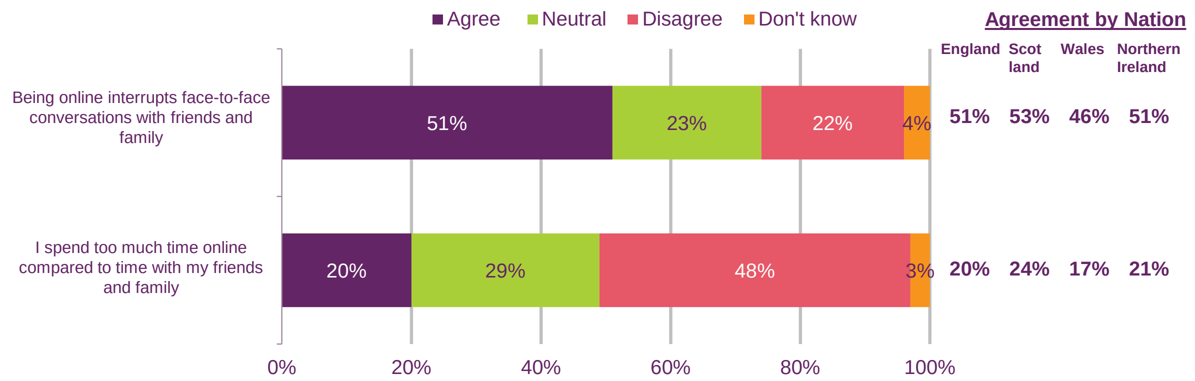


Source: Ofcom research, 'Connected Devices', May 2015
Base: All online adults aged 16+ (n=2290), England (n=1879), Scotland (n=200), Wales (n=113), Northern Ireland (n=98).
Q115. How much do you agree or disagree with the following statements?

<u>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</u>

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

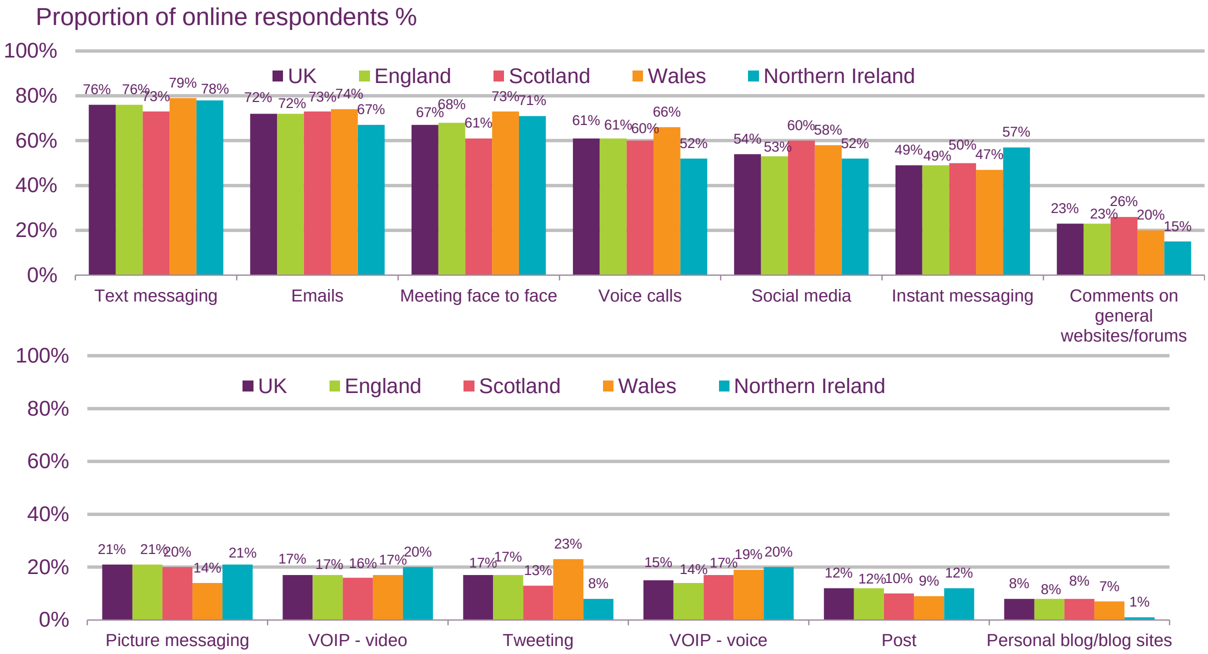
Text messaging is the most common weekly method of communication

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?

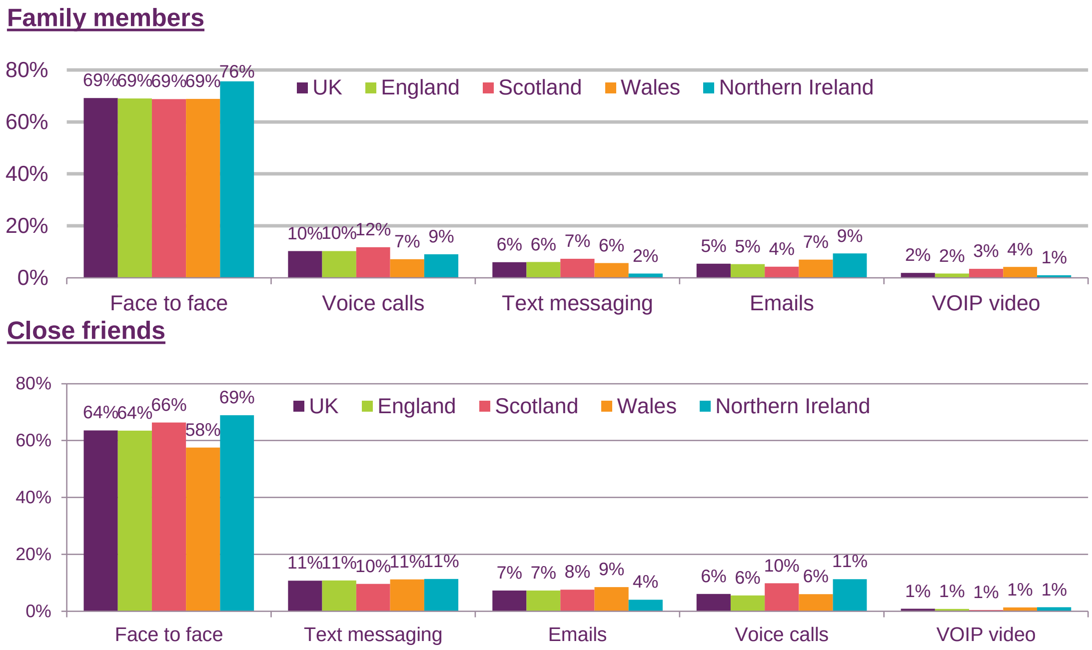
Communicating with close networks: friends and family

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 friends[5].

Figure 1.5 Preferred methods of communicating with friends and family



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

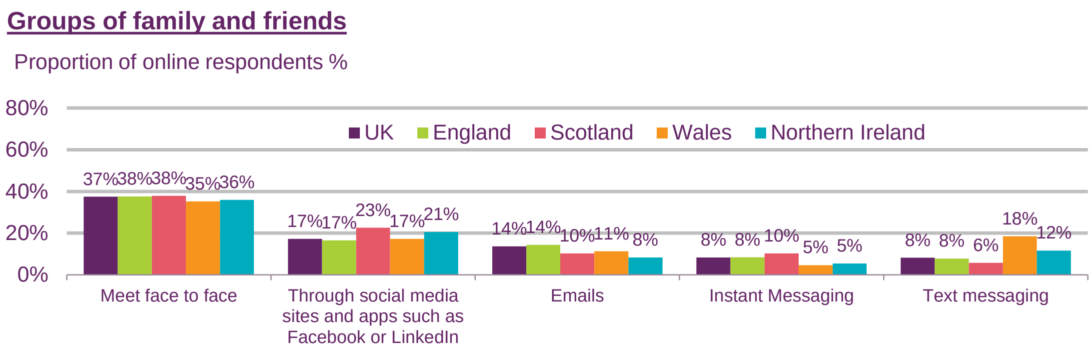
Base: All online adults aged 16+ who communicate with family members and close friends.
Q52. And which of these methods do you prefer to communicate with …… ?
Chart includes data for all responses 5% or over.

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

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



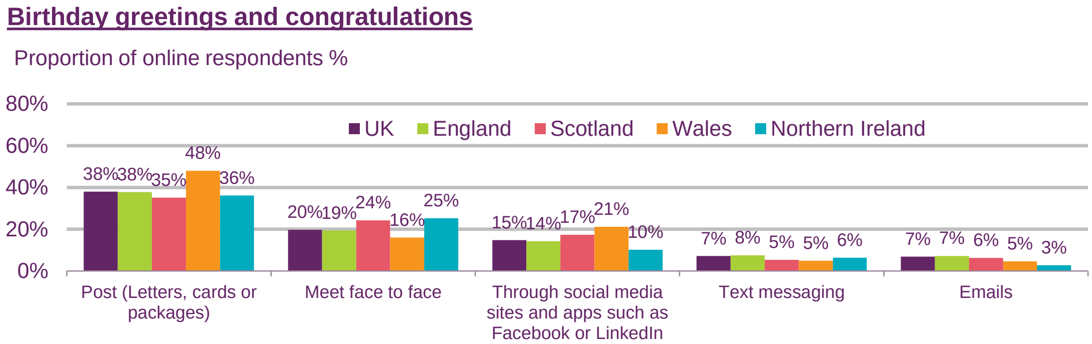
Source: Ofcom research, 'Connected Devices', May 2015

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.

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

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



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.

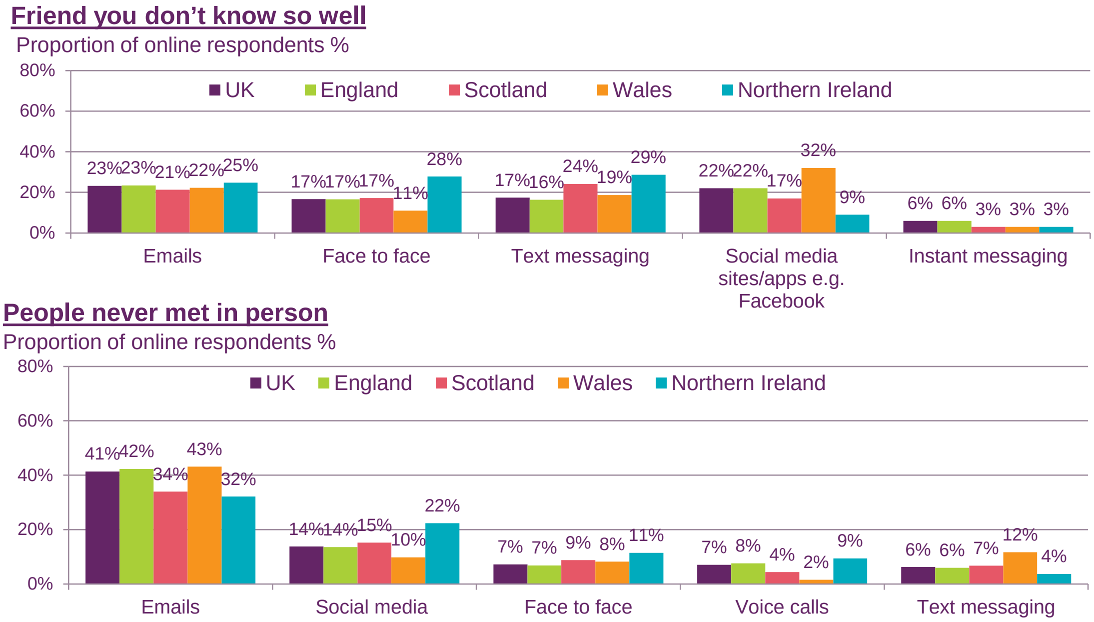
Communicating with people who are less well known

<u>Text messaging and email are the preferred methods for communicating with people less well known</u>

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



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

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

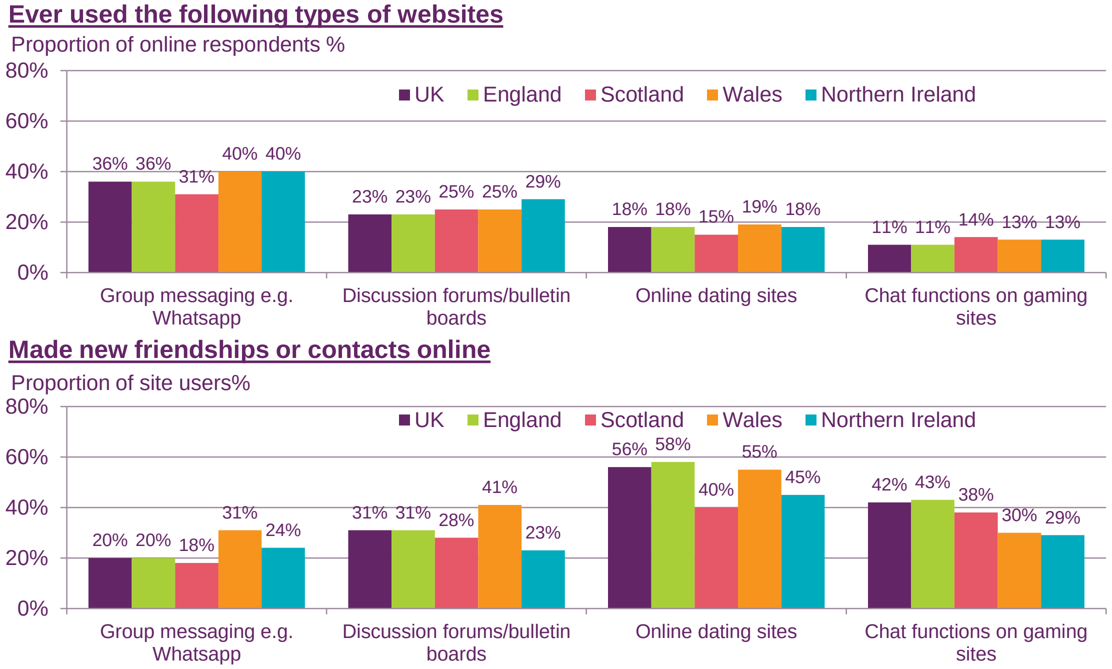
Much of the social media discussed in this section is one-way; that is, a user is posting or creating information that another user can choose to read or view. However, some activities can facilitate introductions between people, enabling them to form new contacts or even friendships.

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 of 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 networks[6].

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 throughout[7]. 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 study[8], 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

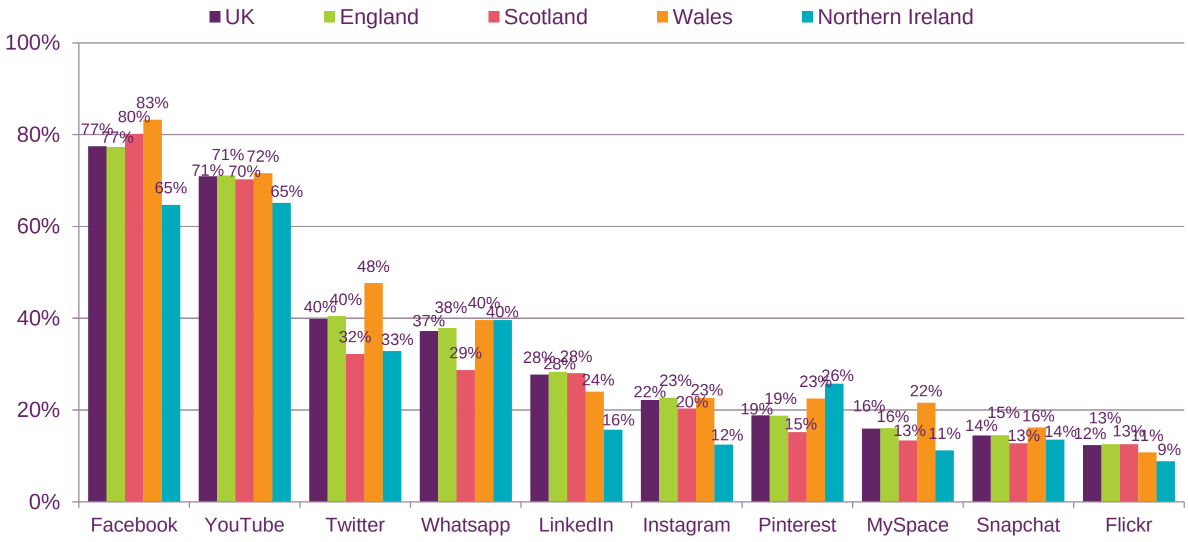
[6] The survey was conducted by YouGov in May 2015 among an online sample of 2,290 UK adults. The number of interviews achieved by nation are: England = 1879, Scotland = 200, Wales = 113 and Northern Ireland = 98.
[7] Due to low base sizes, the confidence with which the population average can be estimated 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

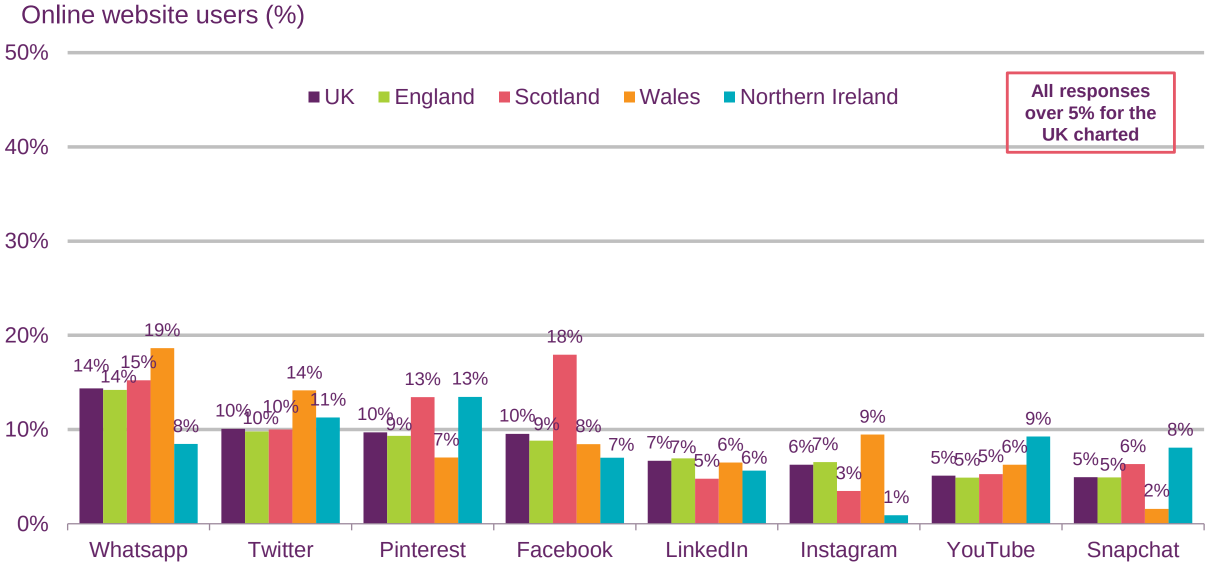


Source: Ofcom research, 'Connected Devices', May 2015
Base: All online adults aged 16+ (n=2290), England (n=1879), Scotland (n=200), Wales (n=113), Northern Ireland (n=98).
Q60. Which of the following websites have you ever used? (Top ten responses shown)

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 reponses 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 photos[9]. 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.

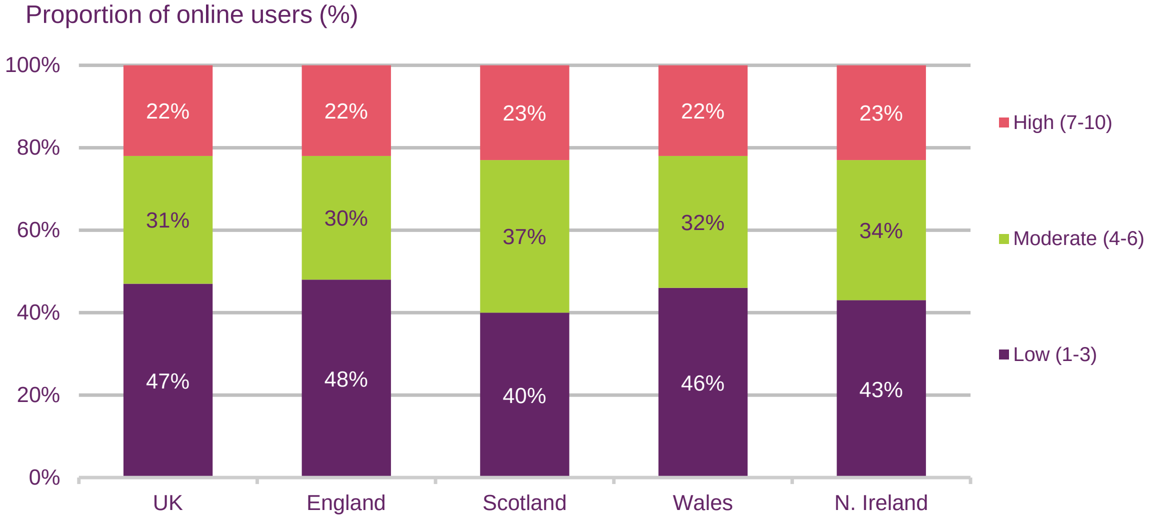
Attitudes to social media

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

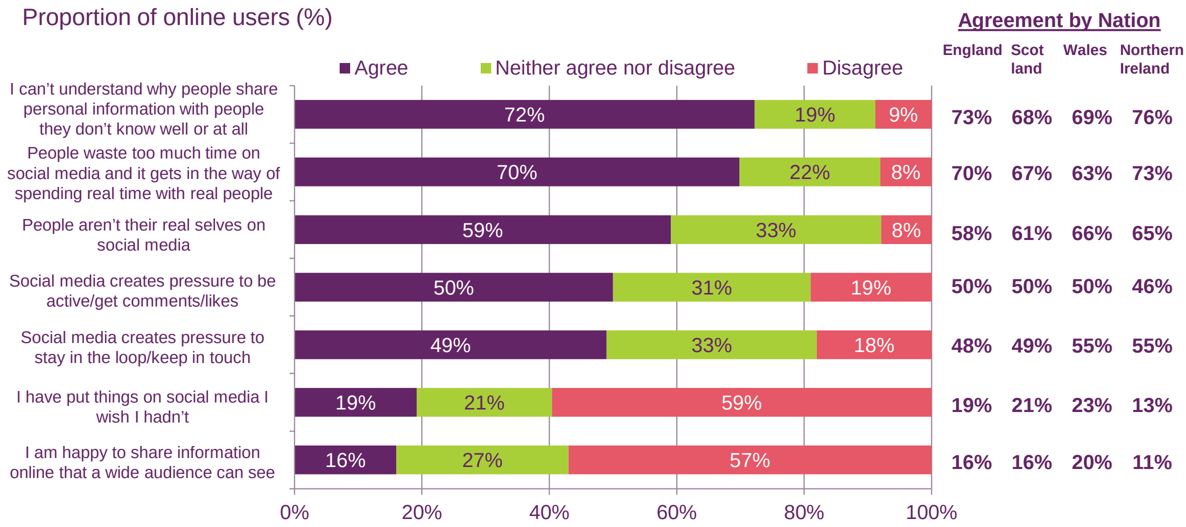


Source: Ofcom research, 'Connected Devices', May 2015
Base: All online adults aged 16+ (n=2290), England (n=1879), Scotland (n=200), Wales (n=113), Northern Ireland (n=98).
Q91. If you had to choose a number between 1 and 10, where 1 represented 'I'm not at all hooked on social media' and 10 represented 'I'm completely hooked on social media', which number would you choose for yourself?

<u>One in five have posted things online they wish they hadn't</u>

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

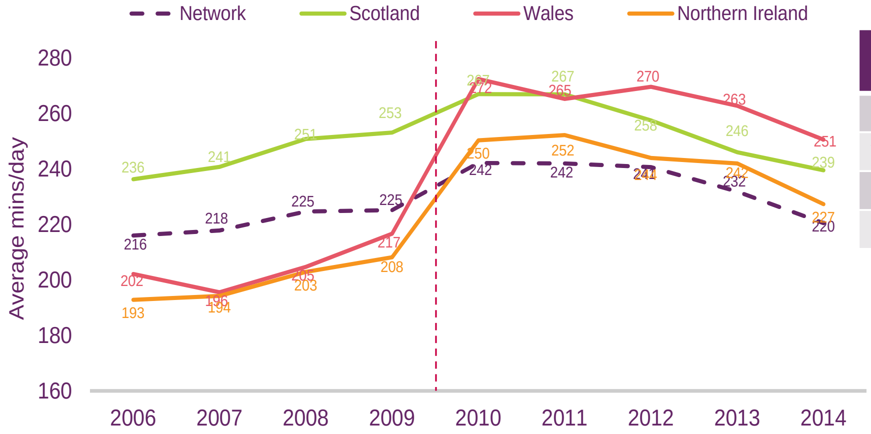
On average, individuals in Northern Ireland watched 227 minutes (3 hours 47 minutes) of broadcast TV a day in 2014[10]; 15 minutes less per day than in 2013. (Figure 1.14)[11]. This was the largest decline across the nations, compared to a fall of 12 minutes per day in Wales, 7 minutes in Scotland and 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+



	% change: 2013-2014
Northern Ireland	**-6.1%(-15min)**
Wales	**-4.7%(-12min)**
Network	-4.9% (-11min)
Scotland	-2.7%(-7min)

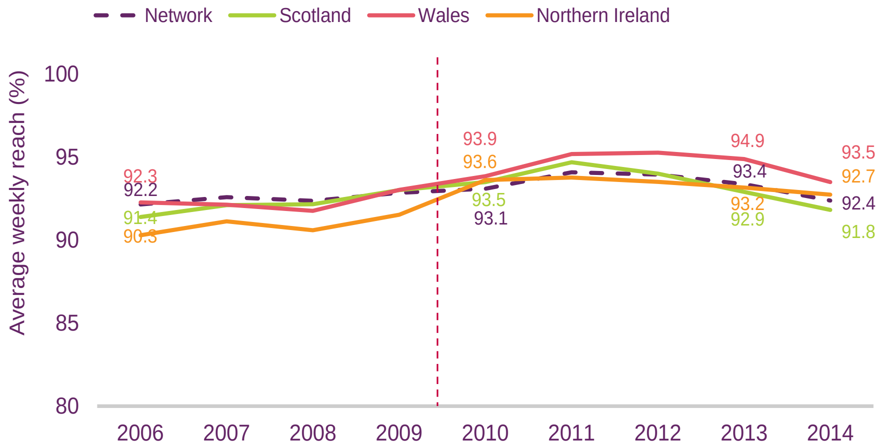
Source: BARB. Note: New BARB panel introduced 1 January 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line). Note: Year-on-year percentage changes are calculated on data to two decimal places.

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+)



	Percentage point change: 2013-2014
Wales	**-1.4**
Scotland	**-1.1**
Network	-1.0
Northern Ireland	-0.4

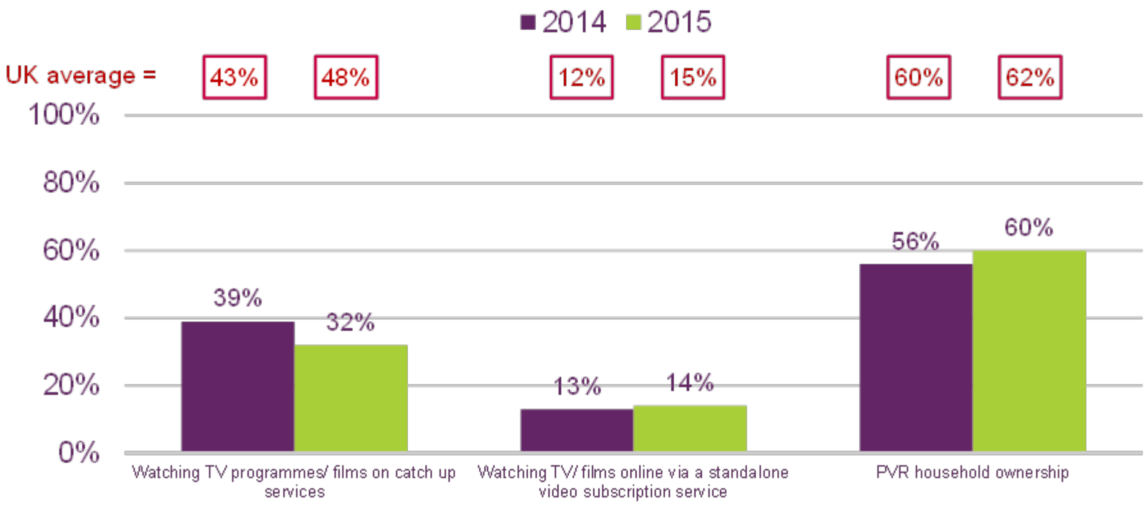
Source: BARB. Reach criteria = 15 consecutive minutes of viewing at least once in the average week. Full weeks used. Note: New BARB panel introduced 1 January 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

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 viewing[12], 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' reporting[13].

[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 Ireland[14].

The research asked consumers to identify which audio-visual related activities they were doing more or less of, compared to a year ago[15]. 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.

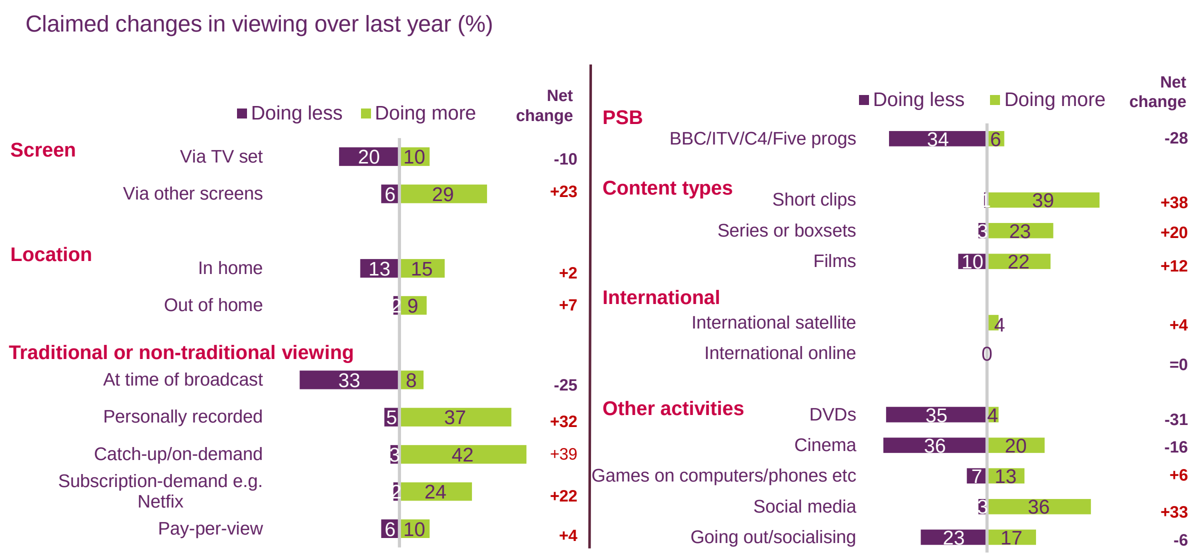
[14] The Northern Ireland boost interviews and the main interviews are reported together as a sample within the nations’ CMR, although the Northern Ireland boost interviews were not included in the overall UK sample.
[15] The research identified respondents’ own views on changes in their viewing and 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



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 (though 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