

Northern Ireland's communications market

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 |

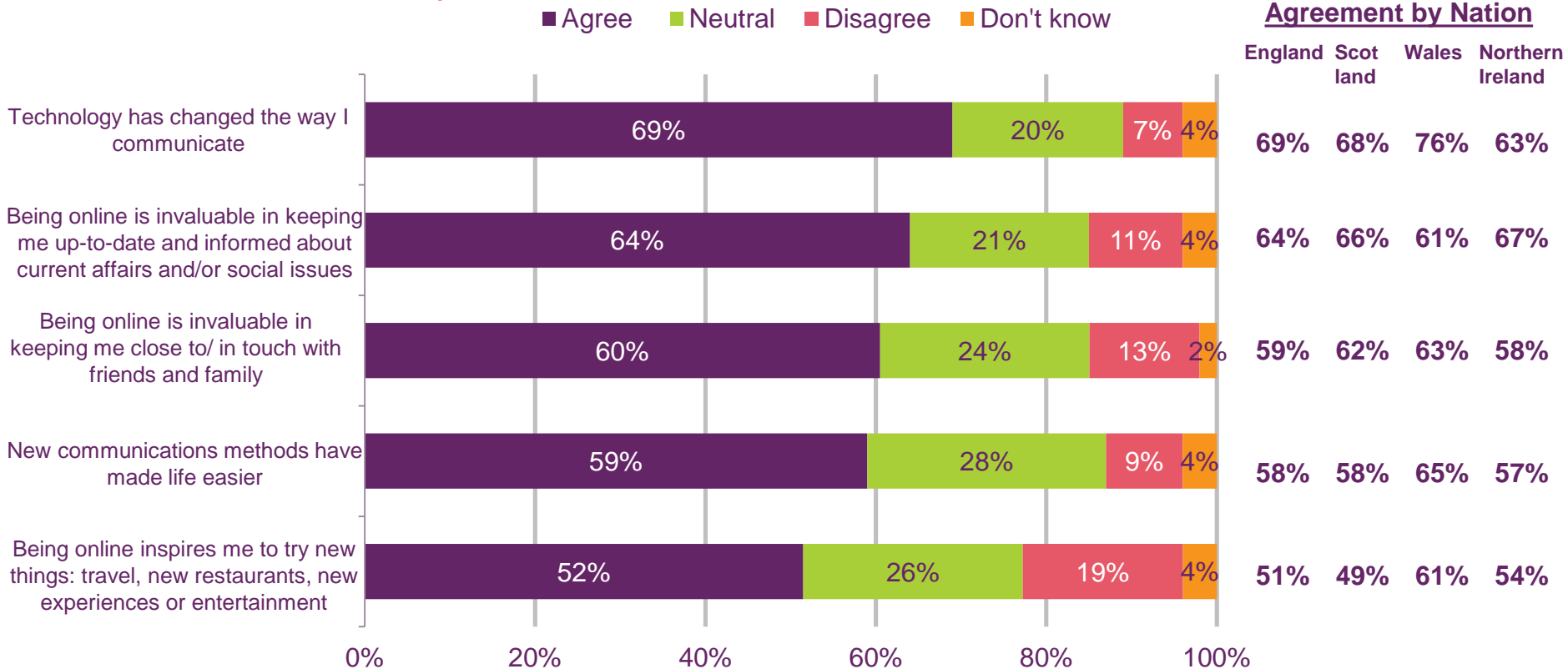
Source: Office for National Statistics: Population Estimates for UK, England and Wales, Scotland and Northern Ireland, Mid-2013; Office for National Statistics: Regional Labour Market, May 2015; Office for National Statistics: Family Spending 2014 edition; Northern Ireland Statistics and Research Agency,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

Social communication online

Figure 1.2



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



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

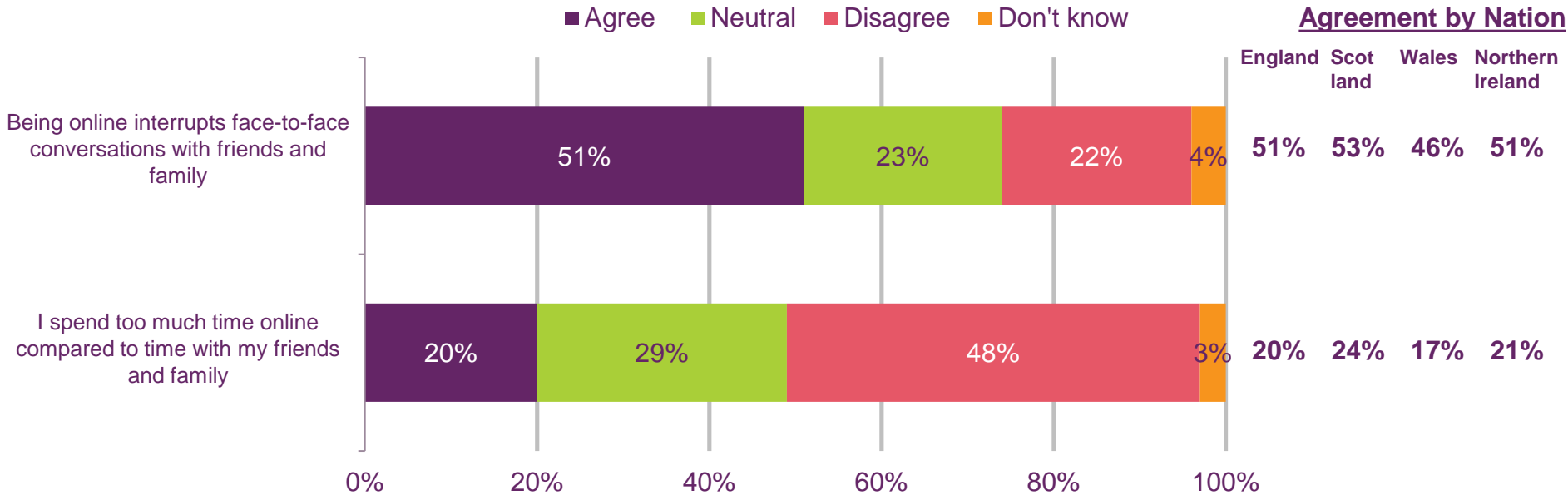
Base: All online adults aged 16+ (n=2290), England (n=1879), Scotland (n=200), Wales (n=113), Northern Ireland (n=98).

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

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).

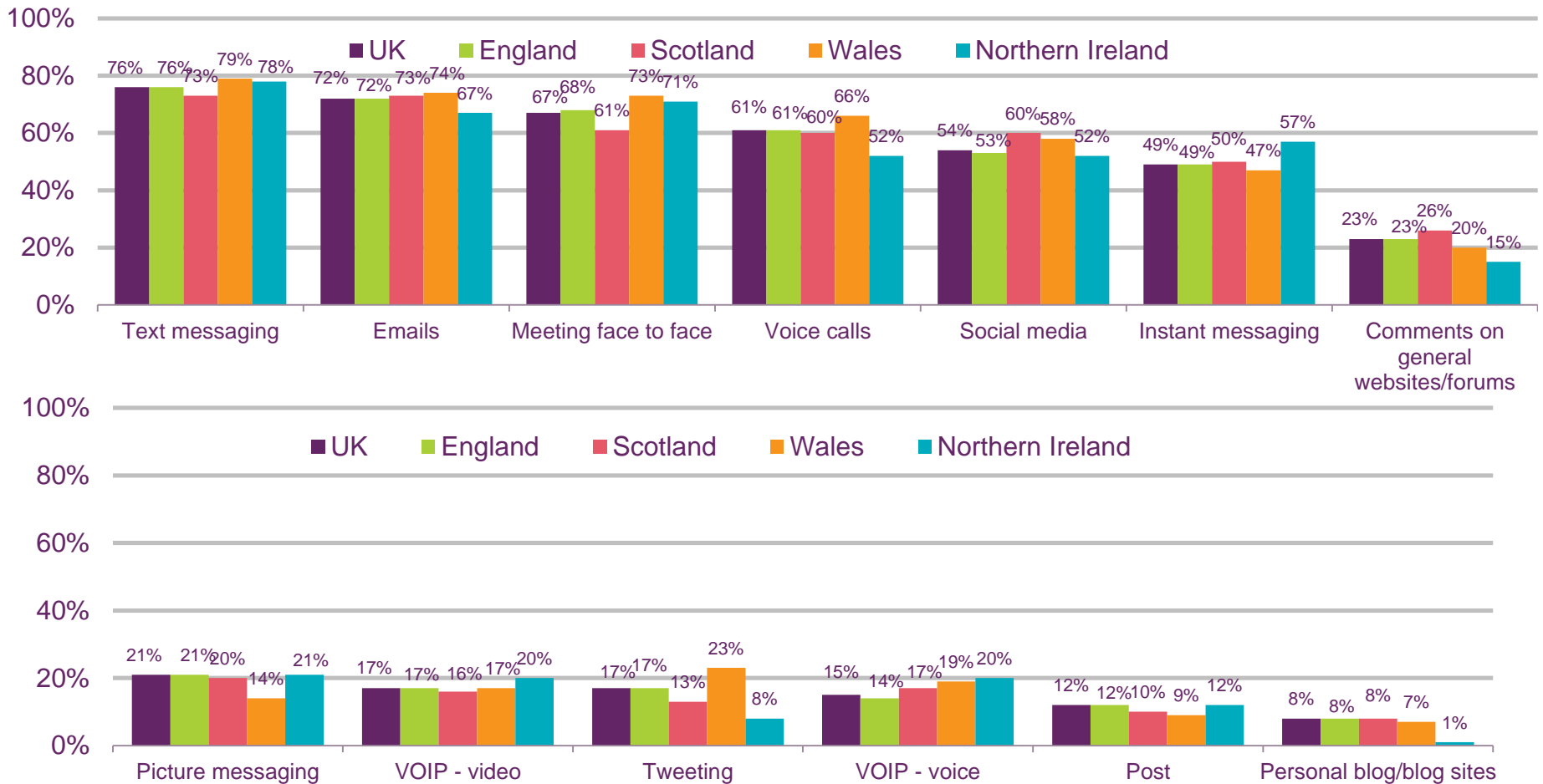
Q115 How much do you agree or disagree with the following statements?

Figure 1.4

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



Proportion of online respondents %



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).

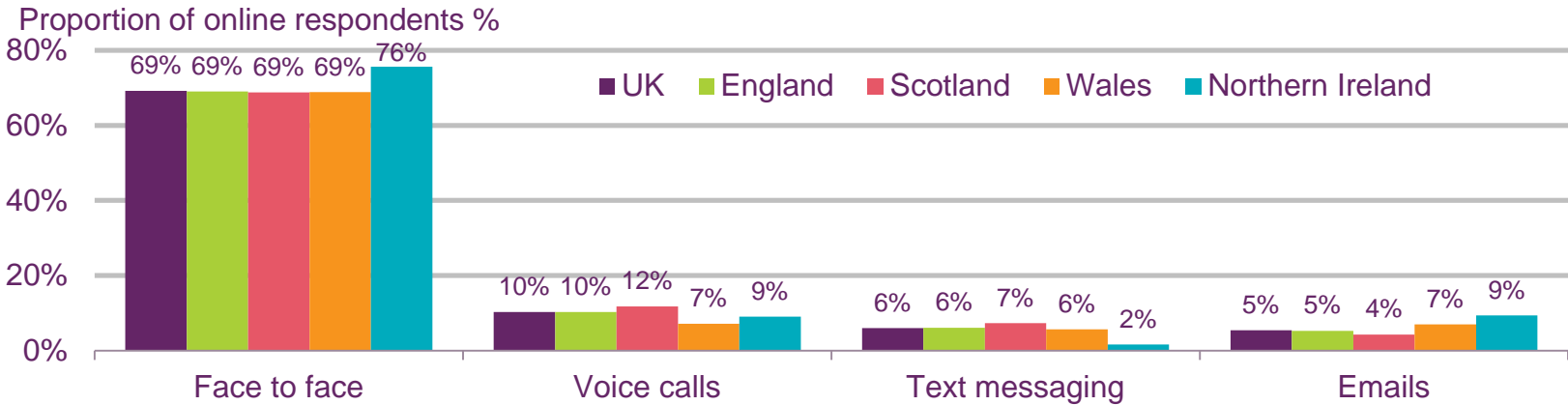
Q50. Thinking about your personal communications in general, how often do you use the following to communicate with family and friends?

Figure 1.5

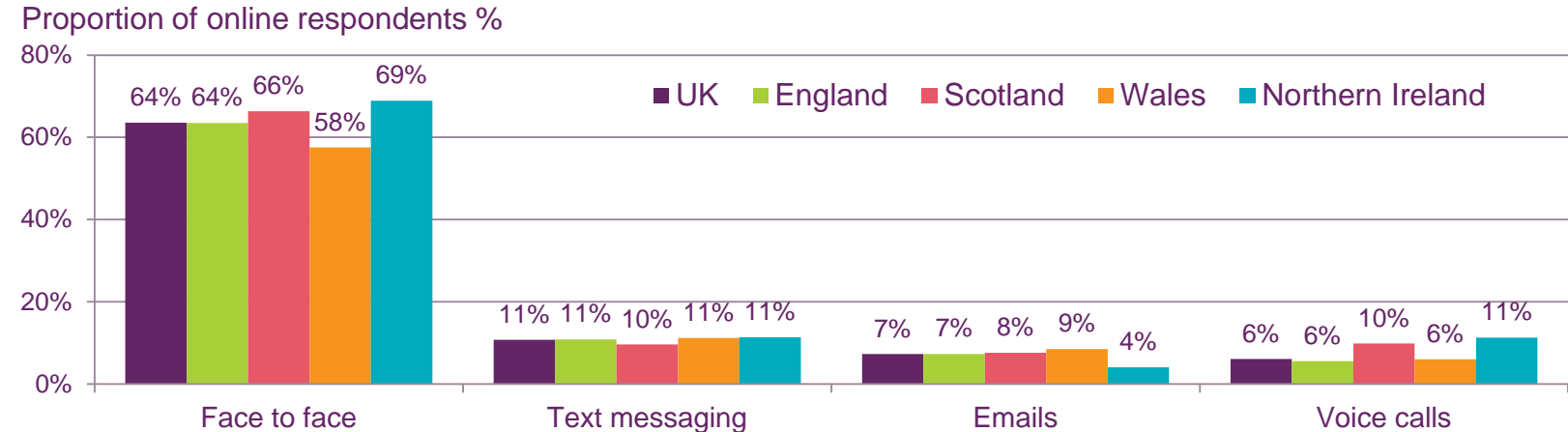


Preferred methods of communicating with friends and family

Family members



Close friends



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

Base: All online adults aged 16+ who communicate with family members and close friends.

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

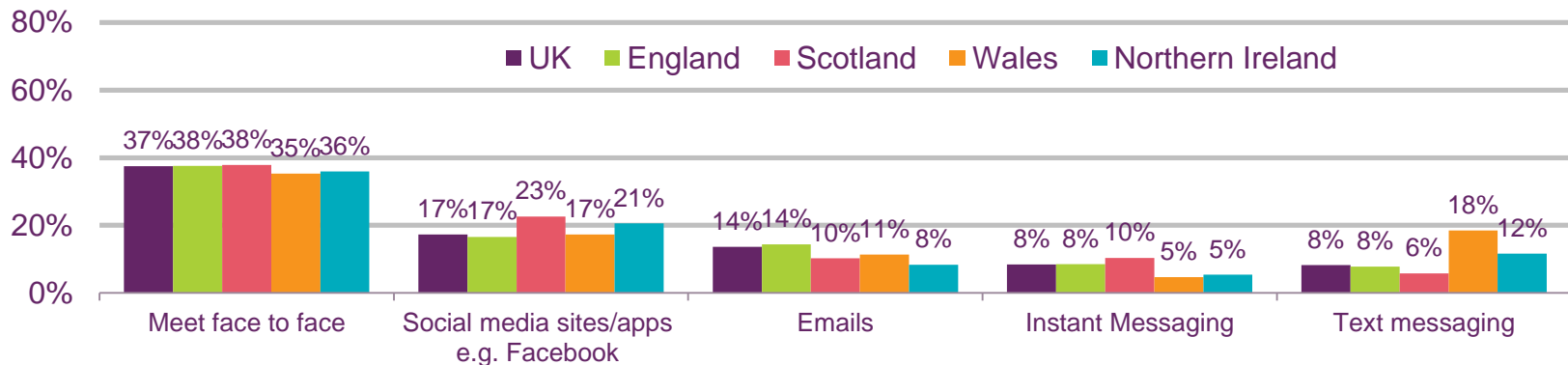
Chart includes data for all responses 5% or over.

Figure 1.6

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

Groups of family and friends

Proportion of online respondents %



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

Base: All online adults aged 16+ who communicate with groups of family and friends.

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

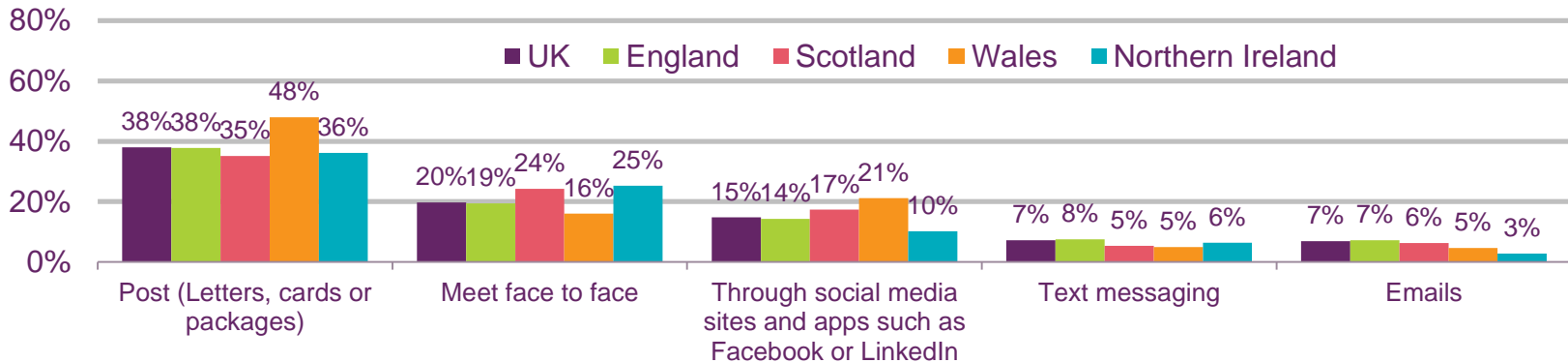
Chart includes data for all responses 5% or over.

Figure 1.7

Preferred method of making birthday greetings and congratulations

Birthday greetings and congratulations

Proportion of online respondents %



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

Base: All online adults aged 16+ who send greetings for occasions and events such as birthdays, get well, congratulations, etc.

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

Chart includes data for all responses 5% or over.

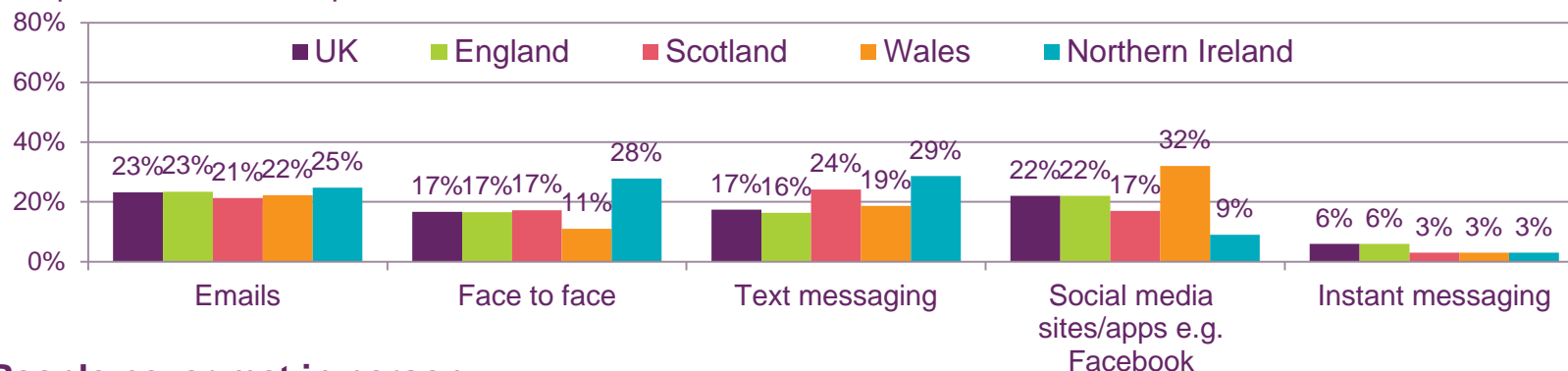
Figure 1.8



Preferred method of communicating with people less well known

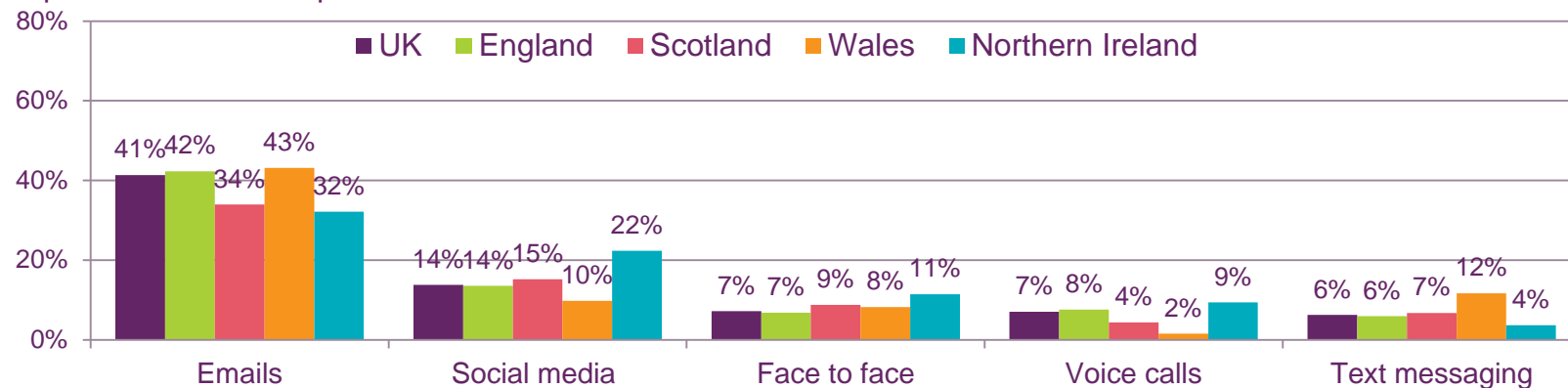
Friend you don't know so well

Proportion of online respondents %



People never met in person

Proportion of online respondents %



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 ?

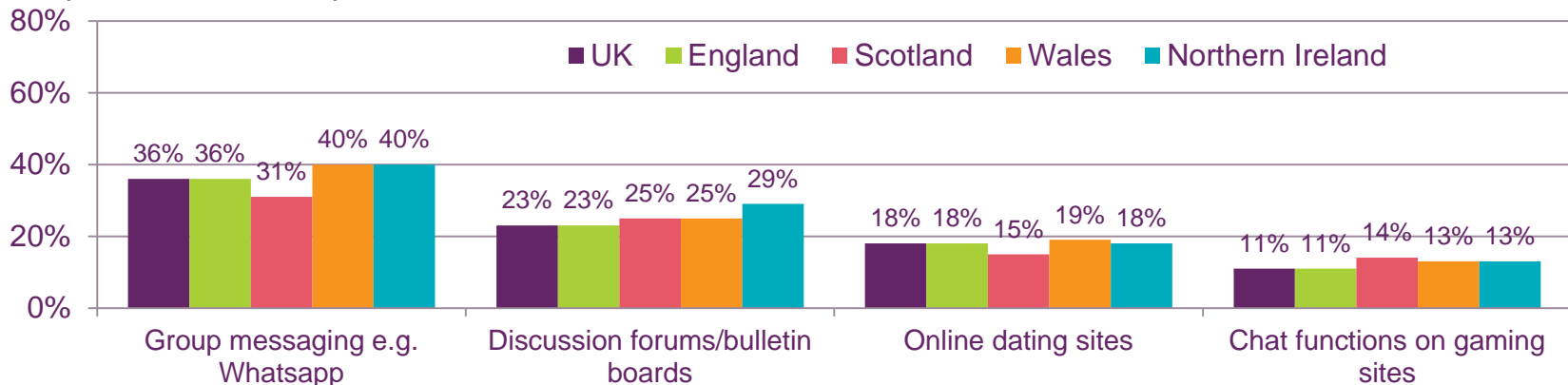
Chart includes data for all responses 5% or over.

Figure 1.9

Use of different online activities to make new contacts

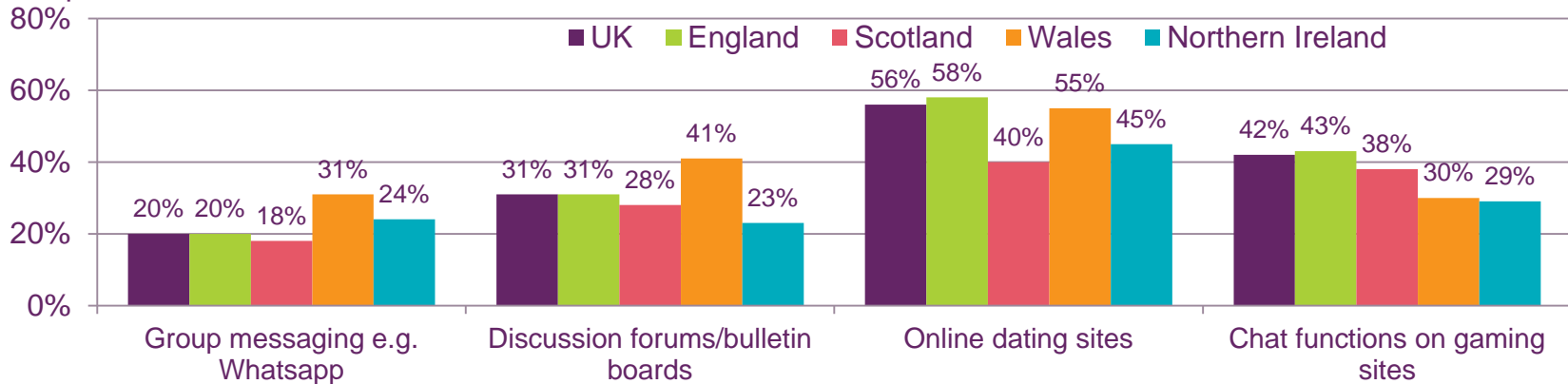
Ever used the following types of websites

Proportion of online respondents %



Made new friendships or contacts online

Proportion of site users%



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

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

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

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

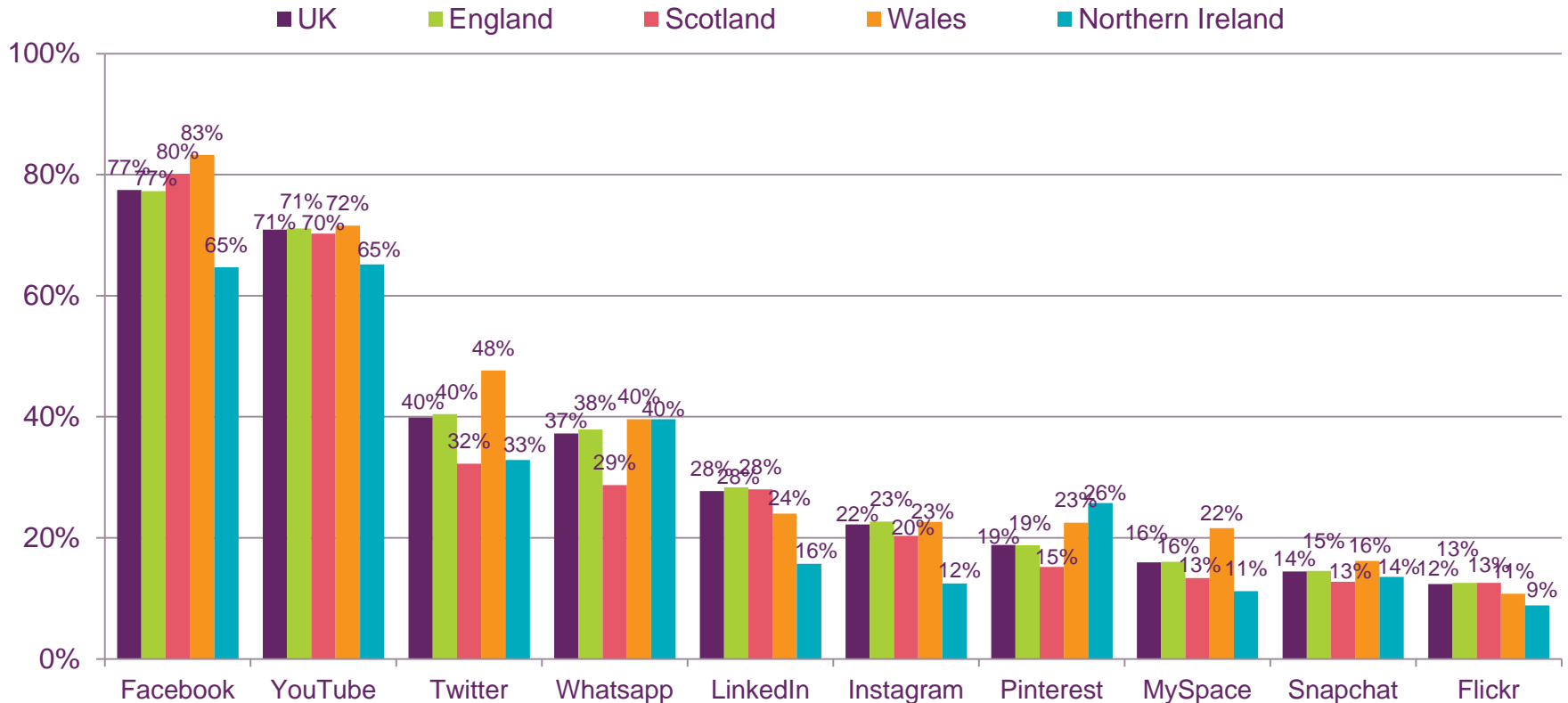
Social networking

Figure 1.10



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

Proportion of online users (%)



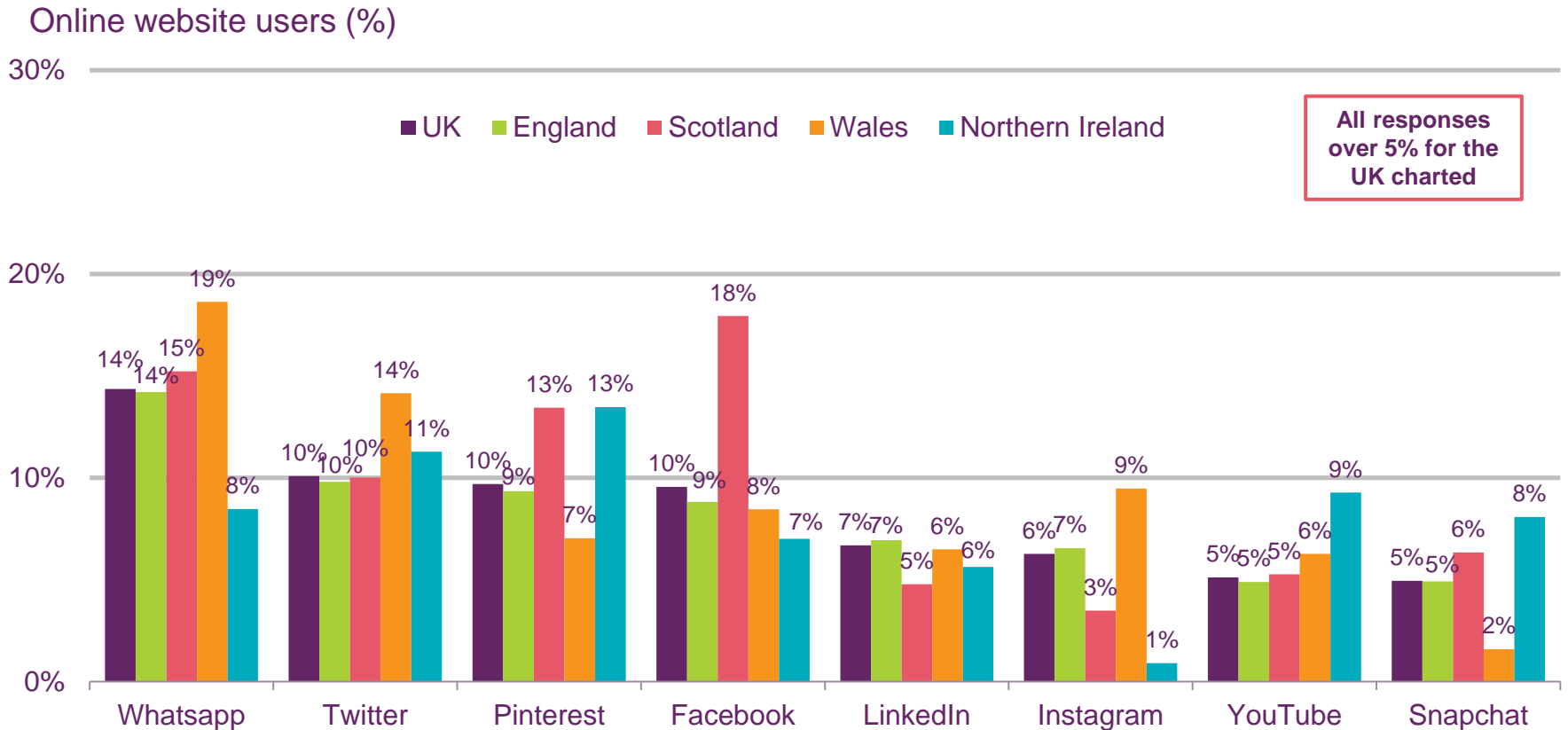
Source: Ofcom research, 'Connected Devices', May 2015

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)

Figure 1.11

Site or app most recently added



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

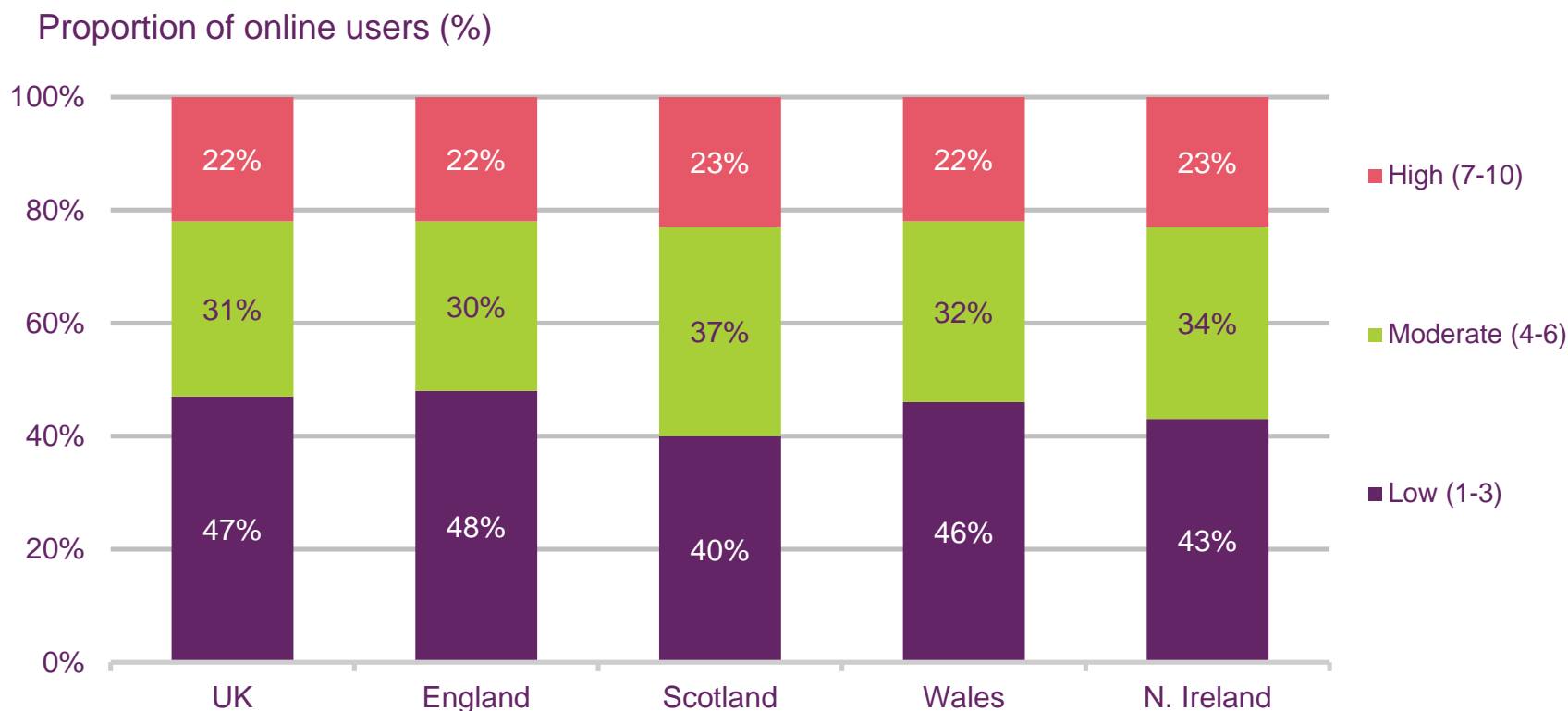
Base: All website users aged 16+ (n=1179), England (n=1457), Scotland (n=161), Wales (n=90), Northern Ireland (n=71).

Q61d. Which one is your most recent addition?

Chart includes data for all responses 5% or over.

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?

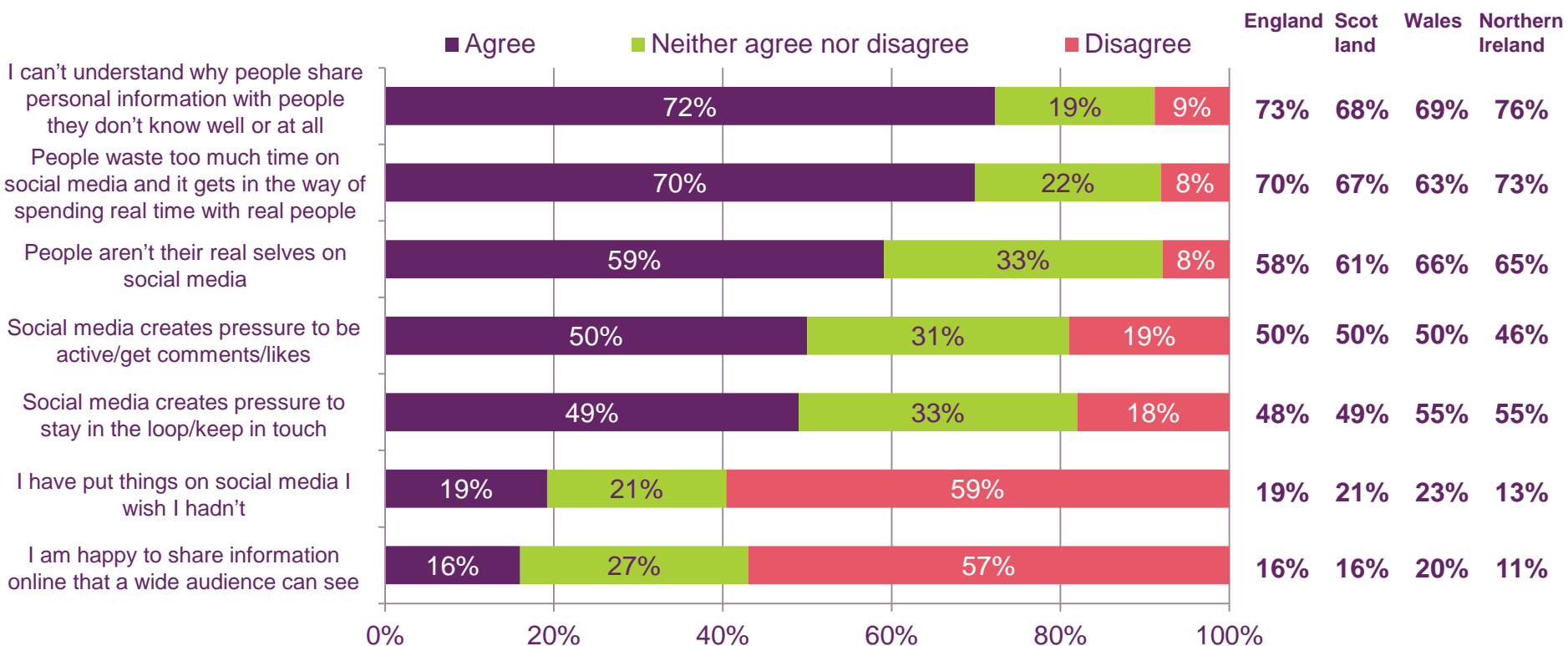
Figure 1.13



Level of agreement with statements about social media

Proportion of online users (%)

Agreement by nation



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

Base: All online adults 16+ = 2290

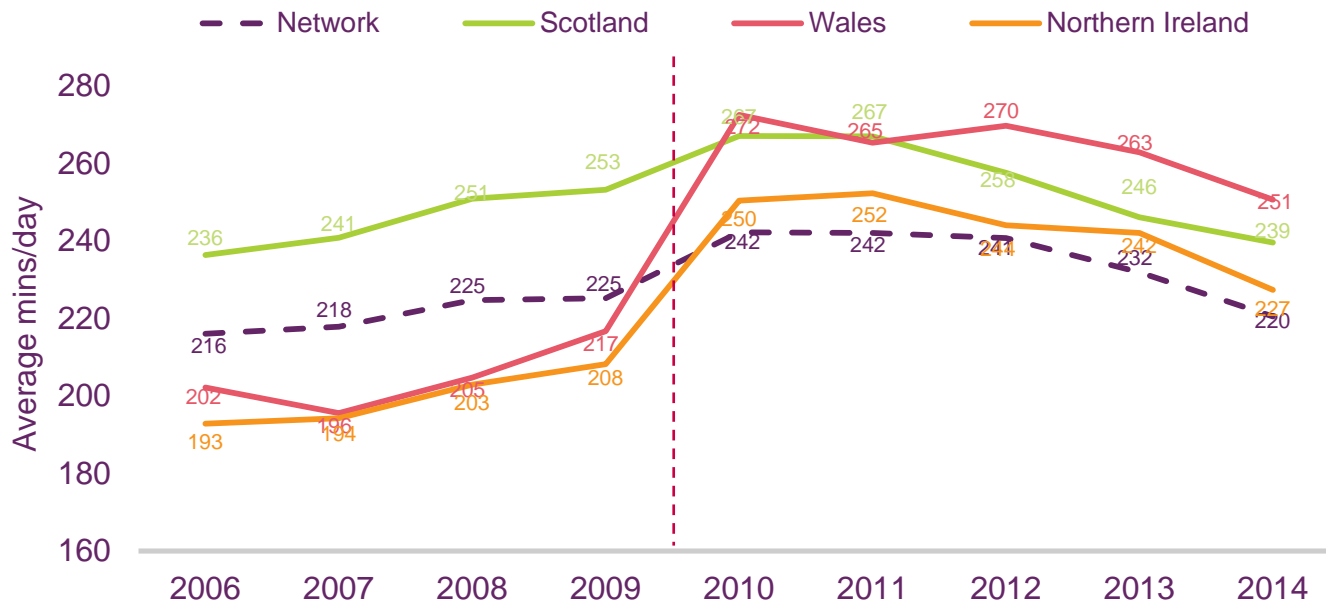
Q90 How much do you agree or disagree with the following statements regarding social media?

Changes in audio-visual consumption in Northern Ireland

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+



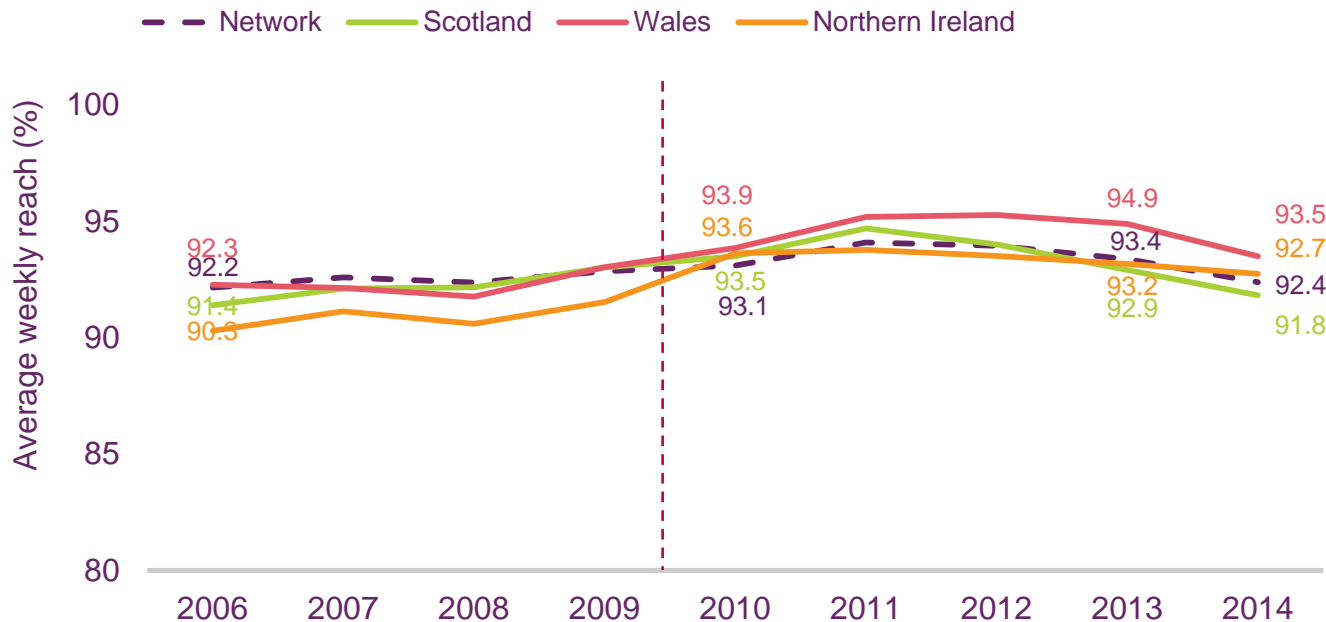
| | % change: 2013-2014 |
|------------------|------------------------|
| Northern Ireland | -6.1%(-15min) |
| Wales | -4.7%(-12min) |
| Network | -4.9% (-11min) |
| Scotland | -2.7%(-7min) |

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.

Figure 1.15

Average weekly reach of total TV, by nation

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

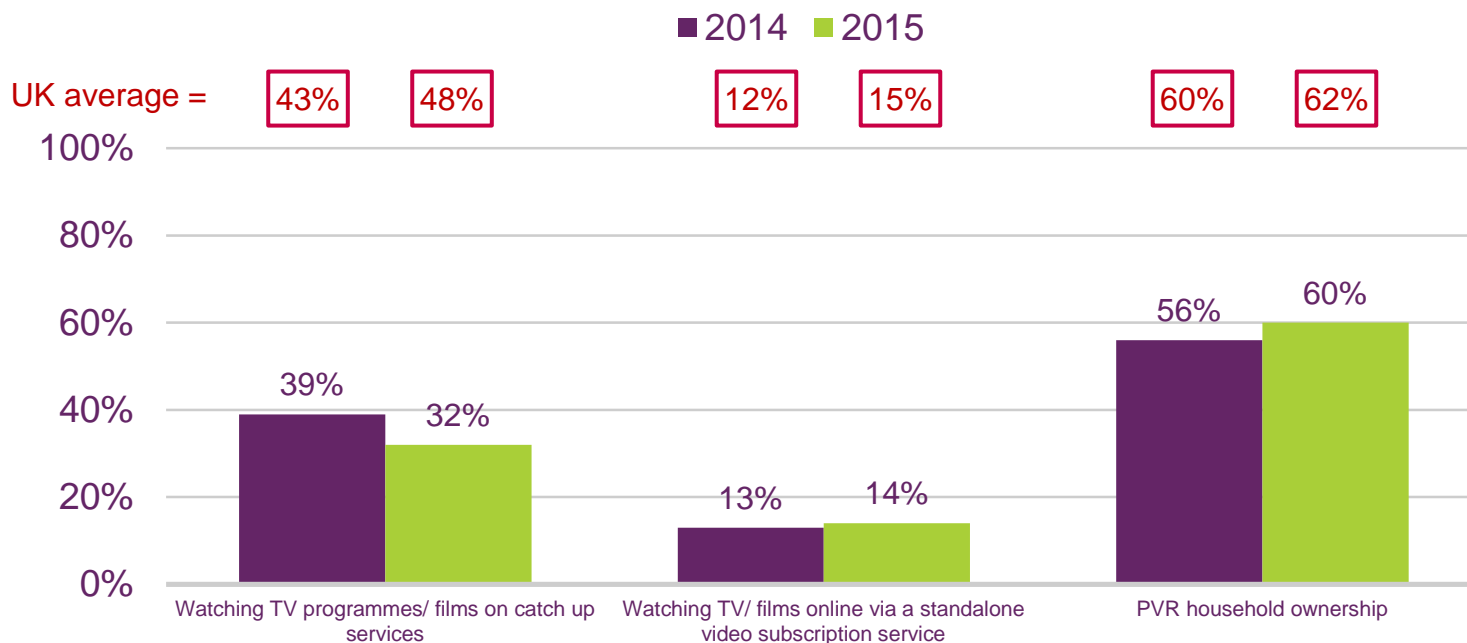


| | Percentage point change: 2013-2014 |
|------------------|------------------------------------|
| Wales | -1.4 |
| Scotland | -1.1 |
| Network | -1.0 |
| Northern Ireland | -0.4 |

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 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

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?

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.

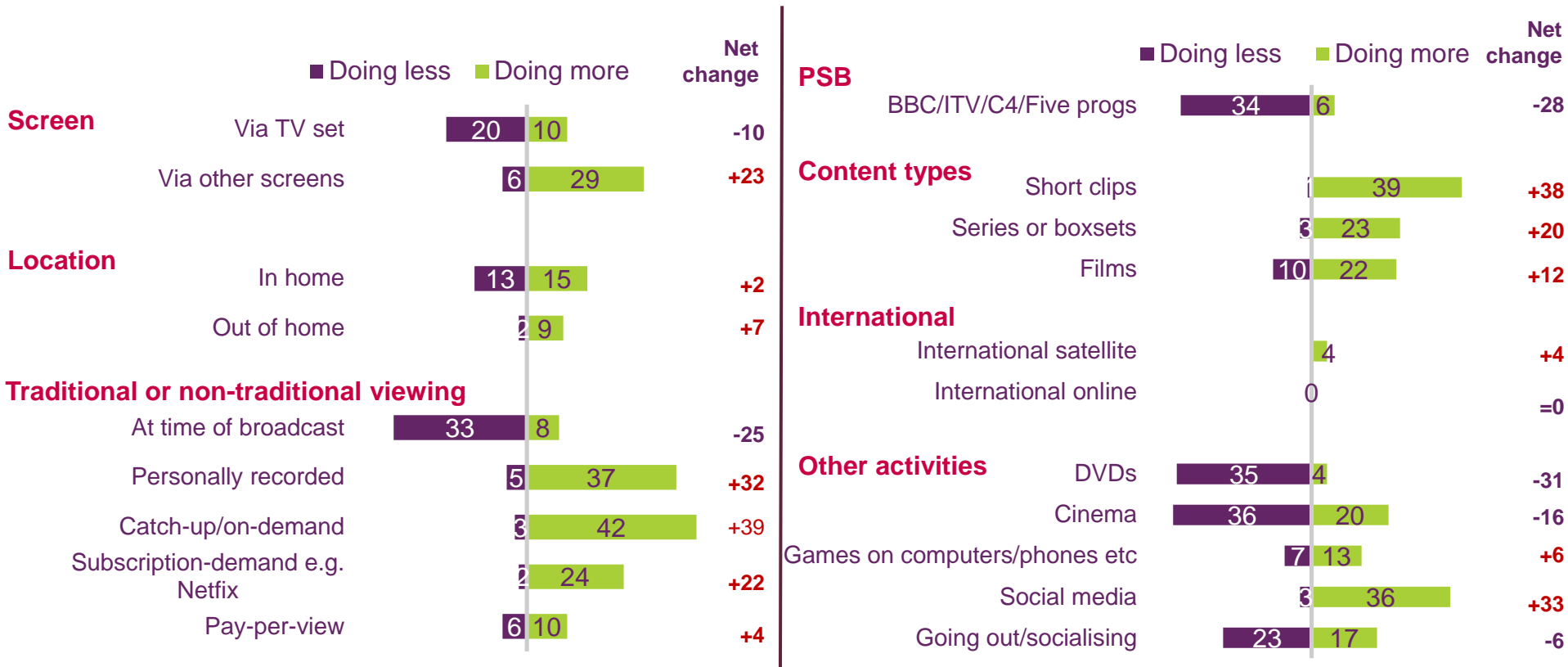
Base: All adults (1878). Question wording: QA, For each of the following activities please say if you are doing this more, the same amount or less now compared to a year ago? This reports the 'net gain' or 'net loss' for an activity. For example, if 20% of respondents said they did an activity more and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

Figure 1.18



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

Claimed changes in viewing over last year (%)



Source: GfK NOP omnibus, April 2015.

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

Ofcom omnibus: research question wording



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

Screen

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

Location

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

Traditional or non-traditional viewing

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

PSB

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

Content

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

International

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

Other activities

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