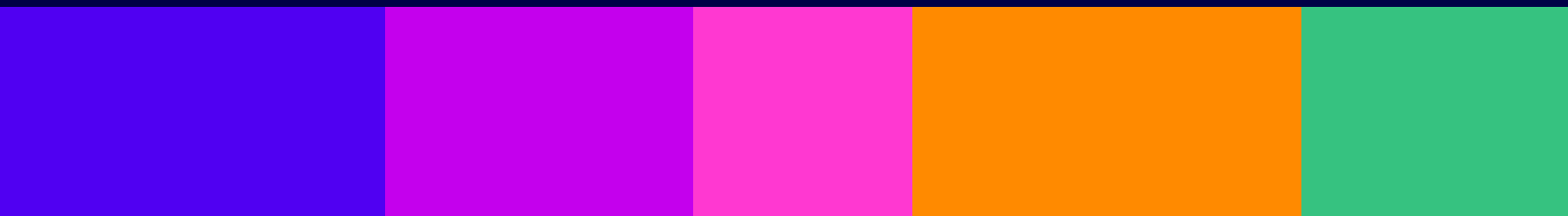
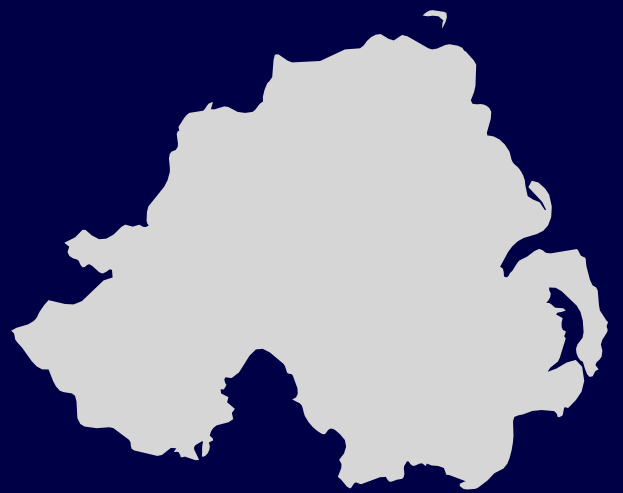




Media Nations

Northern Ireland 2023

Published 3 August 2023



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1. Overview

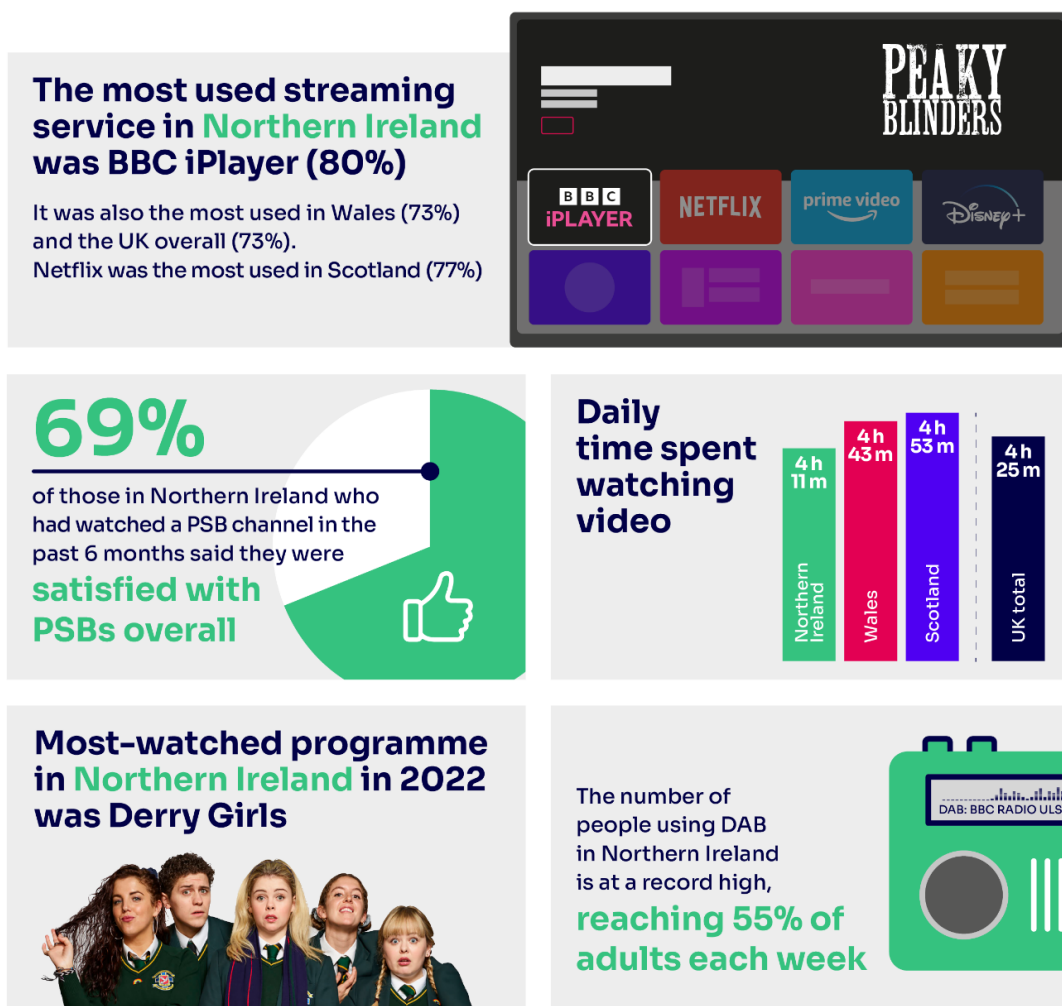
Introduction

This *Media Nations: Northern Ireland* report reviews key trends in the media sector and sets out how audiences are served in Northern Ireland. We adopt a cross-platform perspective, including broadcast TV and radio, as well as digital delivery including online video and audio streaming.

The report provides trends and analysis based on several datasets, including data collected directly from licensed television and radio broadcasters (for output, spend and revenue), Ofcom's own consumer research and Barb and RAJAR data (for audience consumption).

In addition to this Northern Ireland report, there are separate reports for the [UK as a whole](#), [Scotland](#), and [Wales](#).

Key findings



Sources used: Ofcom's VoD Survey 2023, Ofcom's Public Service Media Tracker 2022, Barb, RAJAR, BBC Radio Ulster TSA.

2. TV and video

Market developments

New operating licence for the BBC

Ofcom published a new, modernised [BBC operating licence](#) in March 2023, setting out how Ofcom will hold the BBC to account for delivering its remit, while enabling it to adapt and innovate in how it delivers content to viewers and listeners, whose habits are shifting. The new licence came into effect on 1 April 2023 and includes requirements on the BBC's services in Northern Ireland, including:

- The retention of quotas ensuring that at least 3% of the hours of, and spend on, television network programmes are made in Northern Ireland.
- The retention of quotas for news and current affairs content for BBC One opt-out services in Northern Ireland.
- New transparency requirements for the BBC's services in Northern Ireland regarding its plans to provide a range of content in other genres for audiences.
- The BBC must also provide Irish-language programming and Ulster-Scots programming on TV and radio. In addition, BBC Online must provide content in Irish and Ulster-Scots.

NI Screen funding boost

Northern Ireland Screen is to get an extra £4.8m (about 25%) in funding from the Department for the Economy (DfE) to support the first year of its new four-year strategy [Stories, Skills and Sustainability 2022-2026](#).

Despite pandemic-related challenges, the combined budgets for productions supported by Northern Ireland Screen during its last strategy (Opening Doors Phase II, 2018-22) exceeded £1bn, with more than £330m of that staying in the local economy, surpassing the £300m target set in 2018. Building on that success, Northern Ireland Screen's new strategy has increased that target by more than 40% to £430m.

Notable successes during the past four-year strategy include Lisa McGee's *Derry Girls*, Kenneth Branagh's *Oscar for Belfast*, *Line of Duty*, *Bloodlands* and Netflix's *The School for Good & Evil*.

Boost for GAA coverage

In October 2022 the BBC agreed a [new five-year contract](#) with the Gaelic Athletic Association (GAA) that will increase coverage of hurling and football on BBC platforms.

The All-Ireland senior football and hurling finals will be broadcast live on BBC iPlayer for the first time as part of the deal. The All-Ireland semi-finals will also be broadcast on iPlayer, with either the football or hurling final shown live on BBC network television as part of the deal that will bring these fixtures to a UK-wide audience.

These games are in addition to live coverage of up to eight Ulster Senior Football Championship matches. The All-Ireland finals and semi-finals will be broadcast live on BBC Two NI. BBC Sport and

the GAA have also agreed that up to ten matches in the Allianz National Leagues will be streamed each year on iPlayer.

Live audio coverage of the Ulster SFC, both All-Ireland finals, Allianz League games and club championship matches involving Ulster counties will all be available via BBC Sounds and BBC Radio Ulster/Foyle. Highlights from these games will be available on the BBC Sport NI website.

Channel 4 celebrates Northern Ireland commissions

Belfast-based Tern and Newry-based Big Mountain Productions [recently secured commissions for Channel 4](#), part-funded by Northern Ireland Screen.

Big Mountain was commissioned to make a new four-part series, *The Country House Auction for More 4*, while Tern is to celebrate *Tiny Islands* over four episodes for Channel 4. The commissions are the first fruits of a partnership agreement between the Northern Ireland Screen and Channel 4, signed last year.

BBC announces second series of *Blue Lights*

The BBC has announced that hit Belfast-based drama *Blue Lights*, produced by Two Cities Television will return for a second series.

Series one followed three new PSNI probationary recruits as they navigated their way through their first few months in a uniquely dangerous place to be a response police officer. Viewing figures for *Blue Lights* have impressed, with the first episode reaching 6.4 million. The series proved especially popular with younger viewers. It was the third most-requested programme on iPlayer among all individuals and 16-34s.

Filming on series two begins this summer in Belfast. BBC Studios is the international distributor for both series. Two Cities is part of the STV Studios family of production labels.

TV services and devices

Paid-for satellite services are in about a third of Northern Ireland homes

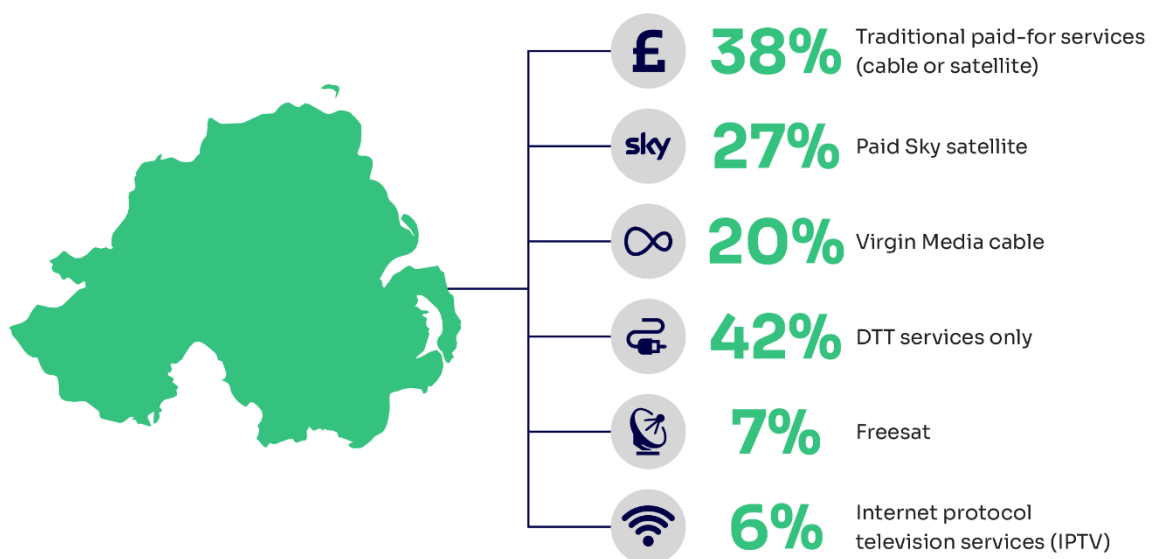
Television sets are an established fixture in our homes, with more than nine in ten households in Northern Ireland (96%) having a TV set in Q1 2023. But the way we access services on our TV sets is changing, primarily because of the amount of content that is being delivered and accessed through the internet.

Traditional paid-for television services such as satellite (mainly Sky) and cable services (Virgin Media) were present in 38% of homes in Northern Ireland in Q1 2023. Paid-for satellite services account for most of these, with Virgin Media's cable service present in 10% of households.

DTT services (delivered through an aerial) account for most free TV viewing (42% of households have DTT as their *only* TV platform), with free satellite present in 7% of homes, through Freesat or Freesat from Sky.

Only a small proportion of homes in Northern Ireland (6%) has an internet protocol television service (IPTV). These are delivered through set-top boxes from providers including TalkTalk and BT, and offer a Freeview service alongside pay-TV channels, delivered through an internet connection.¹

Figure 1: Take-up of TV platforms in Northern Ireland: Q1 2023



Source: Barb Establishment Survey Q1 2023. 'DTT services only' includes households with an aerial only and not cable, satellite or IPTV. IPTV includes BT Vision, TalkTalk, Youview or Plusnet. In the 2022 report 'traditional paid-for services' also included IPTV and is therefore not comparable with the figure above which includes paid cable and satellite only.

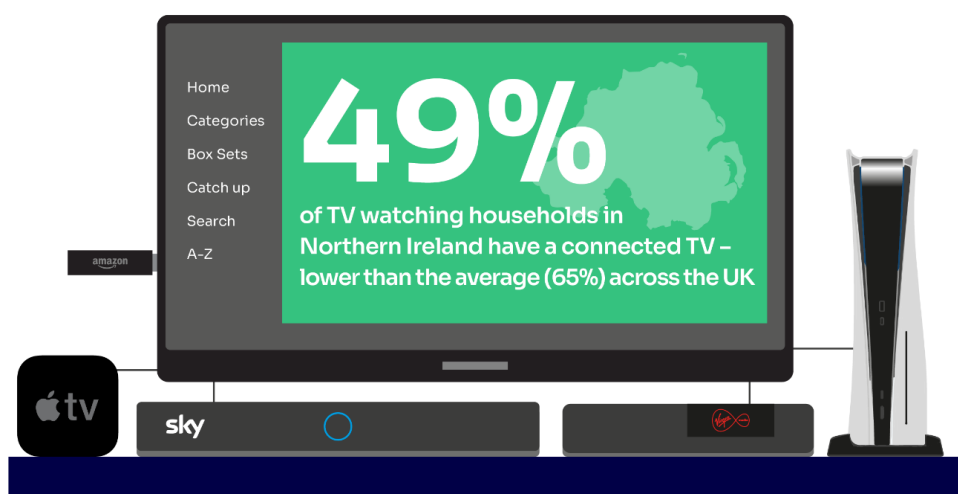
¹ Barb Establishment Survey Q1 2023

Half of TV users in Northern Ireland had connected TVs

There are several ways in which TV users in Northern Ireland can connect their TVs to the internet. This can be through a 'smart' TV that can connect directly to the internet or through the set-top boxes provided by pay-TV providers like Sky, Virgin Media or BT. In addition, external devices like streaming sticks and games consoles can provide internet access to people's TV sets.

About half (49%) of TV users in Northern Ireland have a connected TV, using one of these methods, in 2023. This is lower than the average across the UK, where 65% of TV homes have a connected TV. TV users in Northern Ireland are more likely to connect their TV to the internet via a streaming box or stick (e.g. Amazon Fire TV or Apple TV), with 24% of TV users deploying this connection method compared to 17% across the UK as a whole.

Figure 2: Connected TVs in Northern Ireland: 2023



Source: Ofcom Technology Tracker 2023.

Broadband in Northern Ireland

Almost nine in ten (88%) homes in Northern Ireland had an internet connection in the first half of 2023, and 82% had fixed broadband.² In September 2022, 94% of all homes in Northern Ireland were able to receive superfast broadband (download speeds of at least 30 Mbit/s). Of these, nearly three-quarters of households were using a superfast service (73%), unchanged since 2021. Full-fibre services were available in 85% of households in Northern Ireland. Take-up in those homes was 25%.³

² Ofcom Technology Tracker 2023

³ Ofcom analysis of provider data. Please refer to [Connected Nations 2022 UK report](#) and [Connected Nations 2022 Northern Ireland report](#) for more information.

Viewing trends

Total in-home audio-visual viewing

People in Northern Ireland on average spent less time watching video in 2022 than people in other UK nations

On average, people in Northern Ireland watched 4 hours 11 minutes of video content per day in 2022, the least among the UK nations. Content from broadcasters – which includes live TV, recorded TV and BVoD – accounted for 63% of this time (2 hours 38 minutes), with 13% spent on subscription video-on-demand (SVoD – such as Netflix) and advertising video-on-demand (AVoD – such as Freevee) services, and 16% spent on video sharing platforms (such as YouTube).

Figure 3: Total in-home daily video viewing minutes per person, split by platform, by nation: 2022



Source: Barb, as viewed. Broadcaster content includes live TV, recorded playback and BVoD. The UK total minutes here is not the same as in the UK report; the UK report includes estimates for out-of-home viewing which are not included here. Due to rounding, the total minutes in the chart might be slightly different to summing the individual sections of each bar. 'Other TV set usage' includes viewing to some SVoD/AVoD/VSP that cannot be definitively measured. This category also includes some unmeasured broadcast channels, non-catch-up DVD/DVR viewing, some EPG/menu browsing, viewing when the audio is muted, piracy, unmeasured boxsets/pay-per-view content, and non-video internet activity through a PC or other device connected to the TV. SVoD excludes viewing of NOW, which is captured within BVoD along with Sky Go/Sky TV On Demand (these two services stream the same content, so measured viewing cannot be separated out).

Broadcast TV viewing in Northern Ireland

Where our data comes from

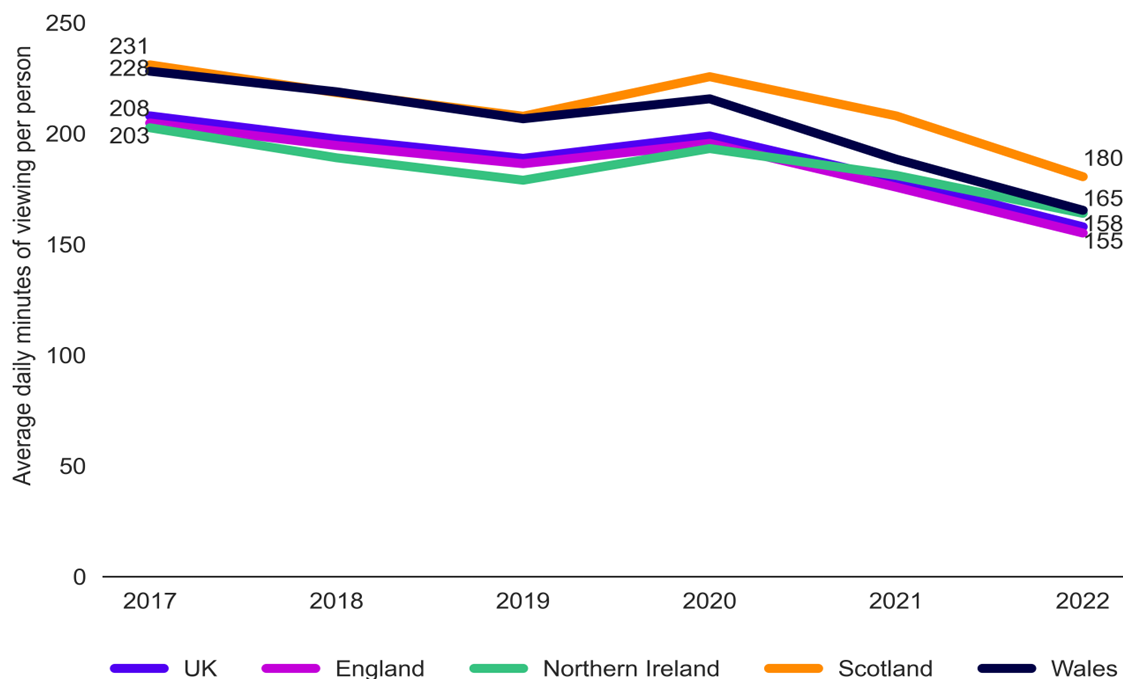
Most of the viewing data comes from Barb Audiences Ltd (Barb), the industry's standard for understanding what people watch. This includes viewing of broadcast TV through TV sets and via devices attached to TV sets, such as computers, streaming devices and set-top boxes. It also includes some viewing for online streaming services and for devices not connected to the TV being watched at home via WiFi. Barb does not capture out-of-home viewing to SVoD services or video sharing platforms.

Unless otherwise stated, Barb figures quoted for broadcast TV are for 28-day consolidated viewing on a TV set. Consolidated viewing includes viewing of programmes at the time they were broadcast (live viewing) as well as from recordings on digital video recorders (DVRs) and through online BVoD services (e.g. BBC iPlayer, ITVX and Sky Go/Sky TV On Demand) up to 28 days after the first broadcast (time-shifted).

Northern Ireland watched the third most broadcast TV of any UK nation in 2022

On average, people in Northern Ireland spent 2 hours 44 minutes per day watching broadcast TV on the TV set in 2022, the third most of any nation in the UK. Compared with 2021, this was a decline of 17 minutes. Proportionally, this represents a 9.5% decline between 2021 and 2022, compared to the UK average decline of 11.9%. Northern Ireland experienced the smallest decrease in daily viewing of all the UK nations. Viewing decreased among all age groups.

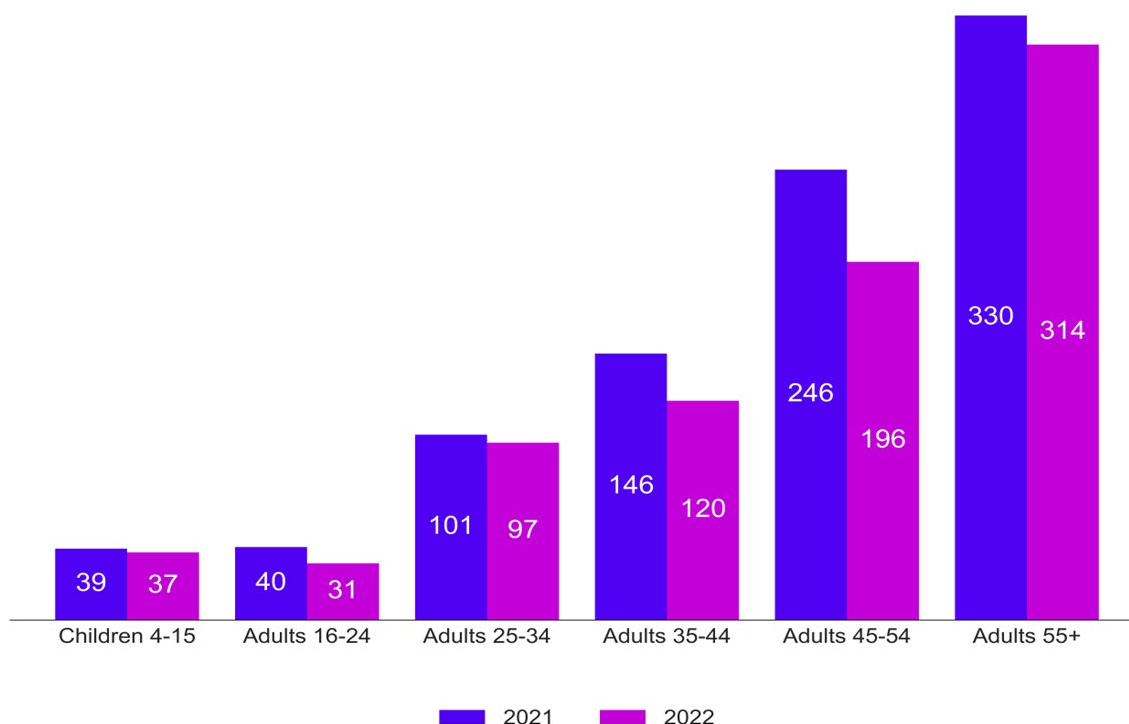
Figure 4: Average daily minutes viewed of broadcast TV per person, by nation: 2017-2022



Source: Barb. BBC areas, all individuals (4+).

In line with the general trend across the UK, older people in Northern Ireland watched more broadcast TV on the television set than younger viewers. The over-54s watched more than any other age group, at an average of 5 hours 14 minutes per day, down by 4.8% since 2021. Those aged 16-24 watched the least, at an average of 31 minutes per day, down by 22.4% since 2021. This is unlike the other nations, where children (aged 4-15) spent the least time watching broadcast TV.

Figure 5: Average daily minutes viewed in Northern Ireland, by age group: 2021-2022



Source: Barb consolidated 28 days, tv set only. BBC areas.

The return of Derry Girls was the most-watched programme in Northern Ireland in 2022

An episode of Channel 4’s comedy series, *Derry Girls*, was the most-watched programme in Northern Ireland in 2022. The first episode of the final series, set in Northern Ireland in the early 1990s, was watched by an average audience of 495,000 on Channel 4. Northern Ireland was the only nation in which a programme from Channel 4 appeared in the top-10 list; all the others comprised of only BBC One and Channel 3 titles.

The King’s Christmas Day message was the sixth most-watched programme in Northern Ireland in 2022, with an average audience of 292,000. Northern Ireland was the only nation where this appeared in the top-10 list.

Figure 6: Top 10 most-watched programmes in Northern Ireland: 2022

| Rank | Programme title | Channel | Date | Average audience (000s) | Programme share (%) |
|------|--|-----------|------------|-------------------------|---------------------|
| 1 | Derry Girls | Channel 4 | 12/04/2022 | 495 | 57.9 |
| 2 | I'm a Celebrity... Get Me Out of Here! | UTV | 22/11/2022 | 462 | 63.4 |
| 3 | The Tourist | BBC One | 01/01/2022 | 388 | 46.5 |

| Rank | Programme title | Channel | Date | Average audience (000s) | Programme share (%) |
|------|---|---------|------------|-------------------------|---------------------|
| 4 | The State Funeral of HM Queen Elizabeth II (part 2) | BBC One | 19/09/2022 | 346 | 60.4 |
| 5 | The State Funeral of HM Queen Elizabeth II (part 1) | BBC One | 19/09/2022 | 308 | 61.2 |
| 6 | The King's Christmas Day message | BBC One | 25/12/2022 | 292 | 55.1 |
| 7 | BBC News at Six | BBC One | 19/09/2022 | 290 | 58.5 |
| 8 | Trigger Point | UTV | 23/01/2022 | 289 | 39.3 |
| 9 | Bloodlands | BBC One | 02/10/2022 | 284 | 38.2 |
| 10 | Strictly Come Dancing | BBC One | 12/11/2022 | 283 | 47.6 |

Source: Barb 28-day consolidated across TV and other devices in the home. Highest occurring episode by channel, ranked by average audience. Channels include any relevant +1 channels.

The main five Public Service Broadcasting channels account for more than half of total broadcast viewing in Northern Ireland

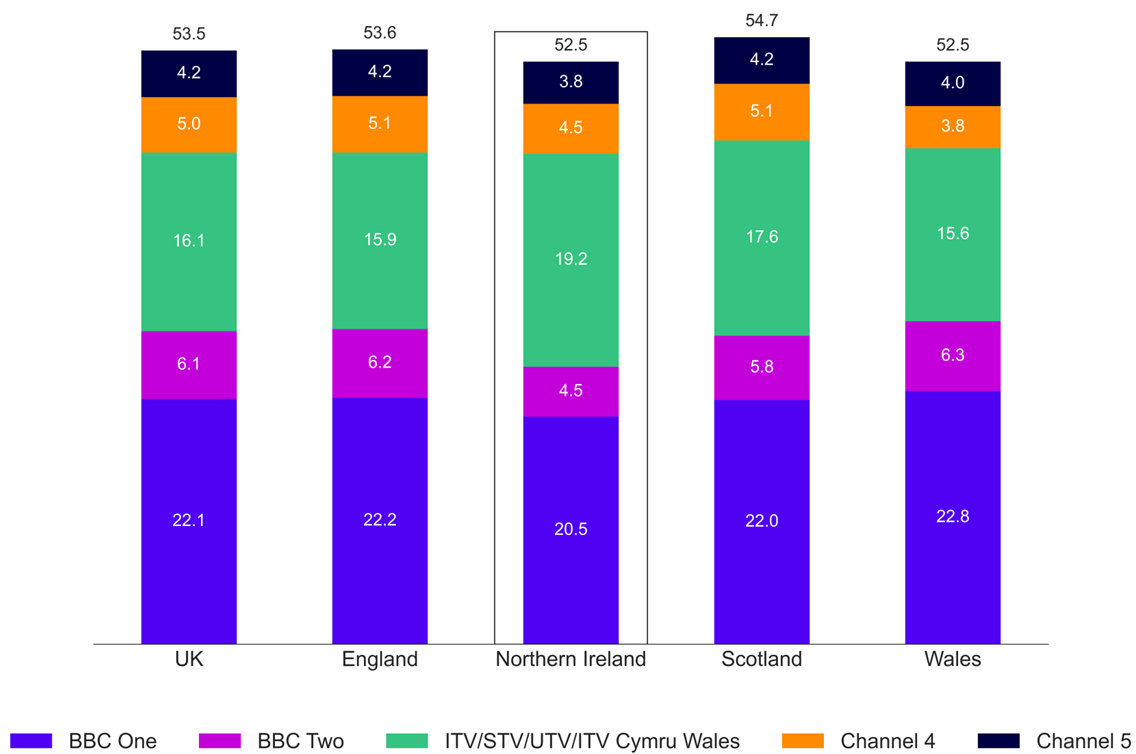
What is public service broadcasting?

Public service broadcasting (PSB) is currently provided in Northern Ireland by the BBC, UTV (holder of the Channel 3 licence in Northern Ireland), Channel 4 and Channel 5. Although all the BBC TV services are PSB channels, only the main channels of the other broadcasters are. In return for providing PSB services such as news and original productions, these broadcasters receive certain benefits: access to spectrum (the radio waves that support wireless communication) to broadcast their services; prominence on electronic programme guides on television (EPGs); and in the BBC's case, the licence fee.

In 2022, the main five PSB channels accounted for a combined 52.5% share of the total broadcast TV audience in Northern Ireland, almost unchanged since 2021 (52.8%). BBC One had the highest audience share of any individual PSB channel, at 20.5%, while Channel 5 had the lowest audience share, at 3.8%.

UTV's audience share in Northern Ireland was the highest Channel 3 share among the UK nations. The audience shares of BBC One, BBC Two and Channel 5 in Northern Ireland are the lowest among the UK nations.

Figure 7: Share of total TV viewing for the five main PSB channels, by nation: 2022 (%)



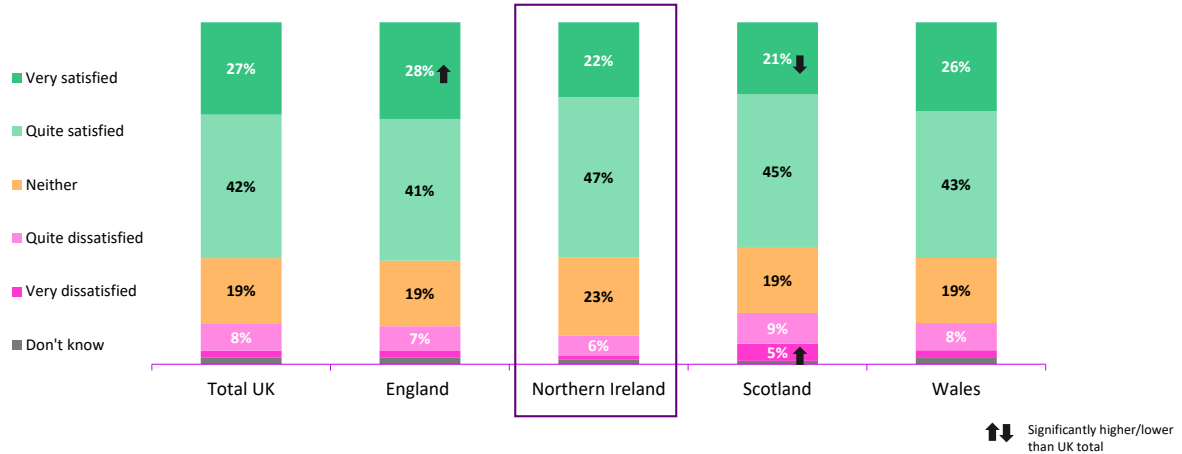
Source: Barb. BBC areas, all individuals (4+). Excludes any +1 channels.

Overall, seven in ten audiences in Northern Ireland are satisfied with PSB channels

Ofcom’s Public Service Media Tracker (PSM)⁴ found that in Northern Ireland, seven in ten (69%) of those who had watched a PSB channel in the past six months said they were satisfied with PSBs overall; less than one in ten (7%) said they were dissatisfied. This is consistent with the UK overall.

⁴ Ofcom’s Public Service Media Tracker 2022.

Figure 8: Satisfaction with PSBs overall – UK total and by nation: 2022

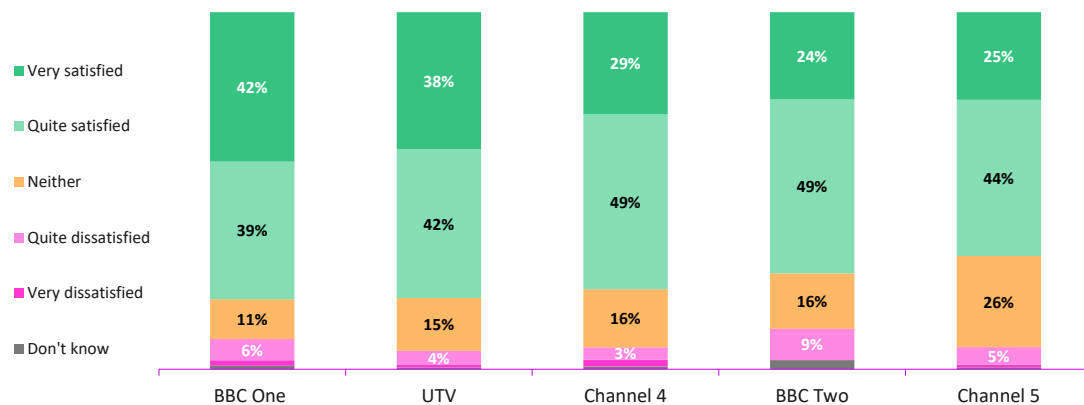


Source: Ofcom’s Public Service Media Tracker 2022. Question 28. And now, if you think about ALL the public service broadcaster channels combined, how satisfied are you that combined they provide the different elements asked about in the previous question? Base: All who have watched PSB channel/service in last 6 months, Total UK (2,826), England (1,850), Northern Ireland (366), Scotland (303), Wales (307). Note, not showing percentages under 5%.

About four in five PSB viewers in Northern Ireland are satisfied with UTV, BBC One and Channel 4

When asked to consider PSB channels individually, about four in five said they were satisfied with UTV (80%), BBC One (80%), and Channel 4 (78%), with a slightly lower proportion saying the same of BBC Two (73%) and Channel 5 (68%).

Figure 9: Satisfaction with individual channels: 2022



Source: Ofcom’s Public Service Media Tracker 2022. Question 23. Thinking about some of the specific channels you have watched in the last 6 months, overall, how satisfied or dissatisfied are you with these TV channels? Base: All who have watched ... in last 6 months, BBC One (334), UTV (332), Channel 4 (331), Channel 5 (288), BBC Two (288). Note, not showing percentages under 3%.

For viewers in Northern Ireland, PSBs are seen to deliver well on programmes made for UK audiences

Seven in ten (72%) PSB viewers⁵ in Northern Ireland said PSBs delivered well on ‘programmes made for UK audiences’. About two-thirds said the same for ‘a wide range of programmes, such as drama, entertainment, comedy or sport’ (65%) and ‘broadcast events that bring the nation together for a shared viewing experience’ (64%). More than half said PSBs delivered well on ‘regional programmes that keep me informed about my area’ (54%), while slightly fewer said the same for ‘programmes that feature Northern Ireland’ (49%).

However, there was variation in attitudes towards individual PSB channels – for example, viewers in Northern Ireland were less likely than the total to say that BBC TV channels provided ‘*programmes about science, arts, culture and religion*’ (53% vs 60%). For UTV and ITV’s TV channels, viewers were more likely than the UK total to say they delivered well on ‘*programmes that feature Northern Ireland*’ (66% vs 49%). The same was true for ‘*regional programmes that keep me informed about my area*’ (71% vs 52%) and for ‘*programmes that feature people like me*’ (53% vs 45%).⁶

⁵ Ofcom’s Public Service Media Tracker 2022 defines PSB viewers as all who have watched a PSB channel/service in the last six months.

⁶ Ofcom’s Public Service Media Tracker 2022.

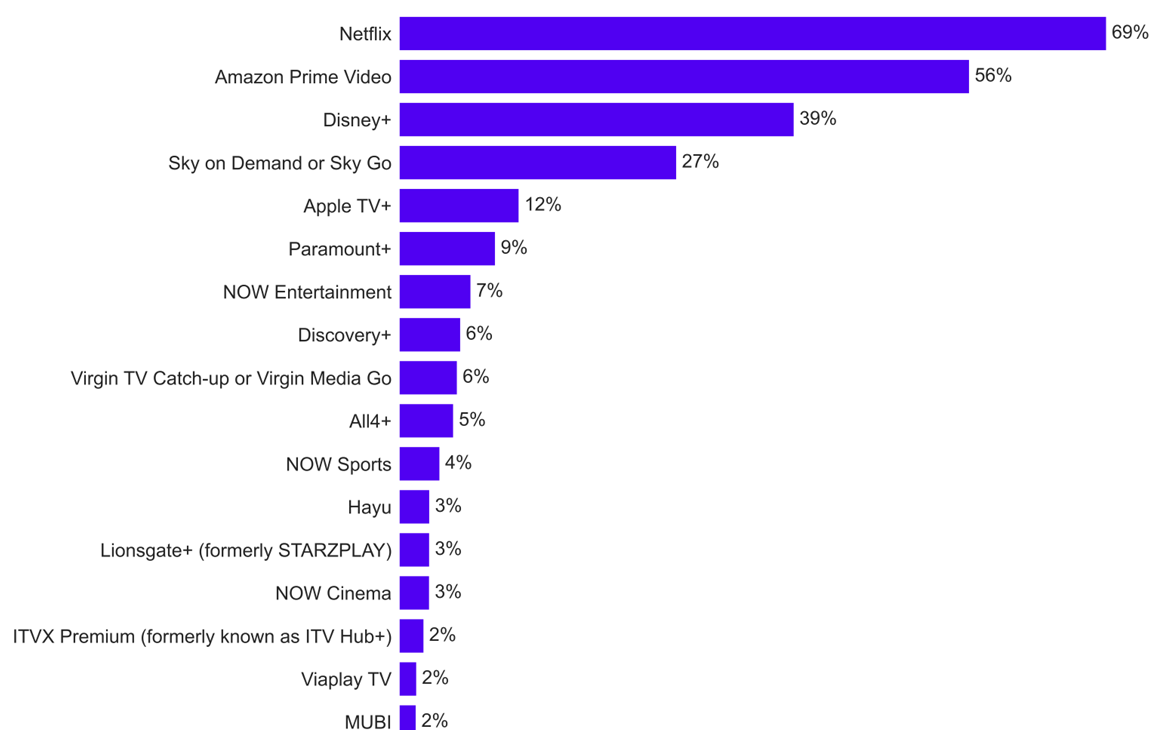
Video-on-demand viewing trends

Viewers have a wide choice of subscription services

In Northern Ireland, the number of households using SVoD services dropped in Q1 2023, with 68% of households reporting using at least one of them, down from 70% in Q1 2022.⁷

Netflix is the most popular SVoD service in Northern Ireland, followed by Amazon Prime Video and Disney+, but there are also many smaller SVoD services available that collectively have significant reach. These include services such as Apple TV+ or Paramount+, and genre specialist services such as Hayu (reality TV).

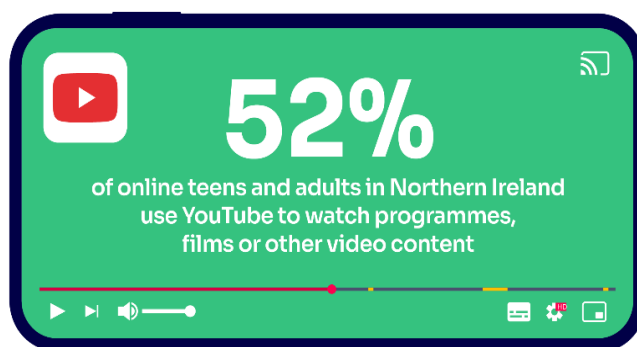
Figure 10: SVoD services used in Northern Ireland to watch programmes, films or other video: 2023



*Source: Ofcom VoD Survey 2023. Online adults/teens aged 13+, Northern Ireland. Question: Q1a. Can you tell us which of the following services you have personally used to watch programmes, films or other video content in the past 3 months? Base: 162. Fieldwork conducted 22nd – 27th February 2023. *Payment of licence fee required to use BBC iPlayer.*

⁷ Barb Establishment Survey Q1 2023.

YouTube was the most popular video-sharing platform, with 52% of online teens and adults in Northern Ireland using it to watch programmes, films or other video content in the three months before the fieldwork, slightly lower than all other UK nations.



In Northern Ireland the most popular form of content viewed on YouTube are videos under 15 minutes (50%), followed by 'YouTube Shorts' (43%), which are more popular in Northern Ireland than in any other UK nation. Forty-two per cent reported using YouTube for videos longer than 15 minutes, while 14% reported watching full-length programmes or films on YouTube, the lowest of all the UK nations.⁸

Ofcom's PSM Tracker shows that levels of satisfaction with SVoD services remained high; more than four in five viewers in Northern Ireland said they were satisfied with Disney+ (81%), Netflix (84%) and Amazon Prime (84%).

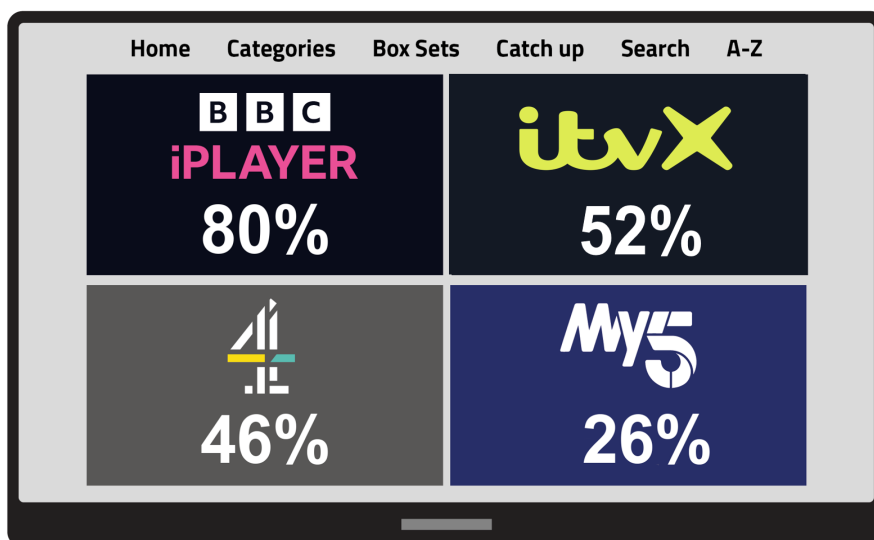
BVoD remains comparable with SVoD, with most consumers using multiple streaming services

Ofcom's VoD survey found that 96% of online adults and teens in Northern Ireland used a free-to-view service (any streaming service not behind a paywall, including YouTube), slightly higher than the other UK nations.

Four in five people in Northern Ireland (80%) reported using BBC iPlayer in 2023, with just under half using Channel 4 (46%) and just over one in four using My5 (26%) over the same period. Following its launch at the end of 2022, just over half of people in Northern Ireland said they used ITVX in early 2023.

⁸ Ofcom's VoD Survey 2023.

Figure 11: PSB video-on-demand services used to watch programmes, films or other video in the past three months



Source: Ofcom VoD Survey 2023. Online adults/teens aged 13+, Northern Ireland. Question: Q1a. Can you tell us which of the following services you have personally used to watch programmes, films or other video content in the past 3 months? Base: 162. Fieldwork conducted 22nd – 27th February 2023. *Payment of licence fee required to use BBC iPlayer.

Overall, audiences in Northern Ireland are satisfied with BVoD services

When asked about satisfaction with different BVoD services, four in five (81%) viewers in Northern Ireland said they are satisfied with BBC iPlayer, and around three quarters said the same for ITV Hub (76%)⁹, My5 (72%) and All 4 (71%).

BVoD viewers¹⁰ in Northern Ireland said they had used BVoD services ‘to catch up on programmes that I have missed on TV’ (62%), so they can ‘watch what they want, when they want’ (47%), to ‘watch specific programmes or boxsets’ (43%) or to ‘access older or archive programming’ (36%). The most frequently-cited reasons for not using BVoD services related to preferring other services, not being interested in the programmes available or not having access to the service.

News sources

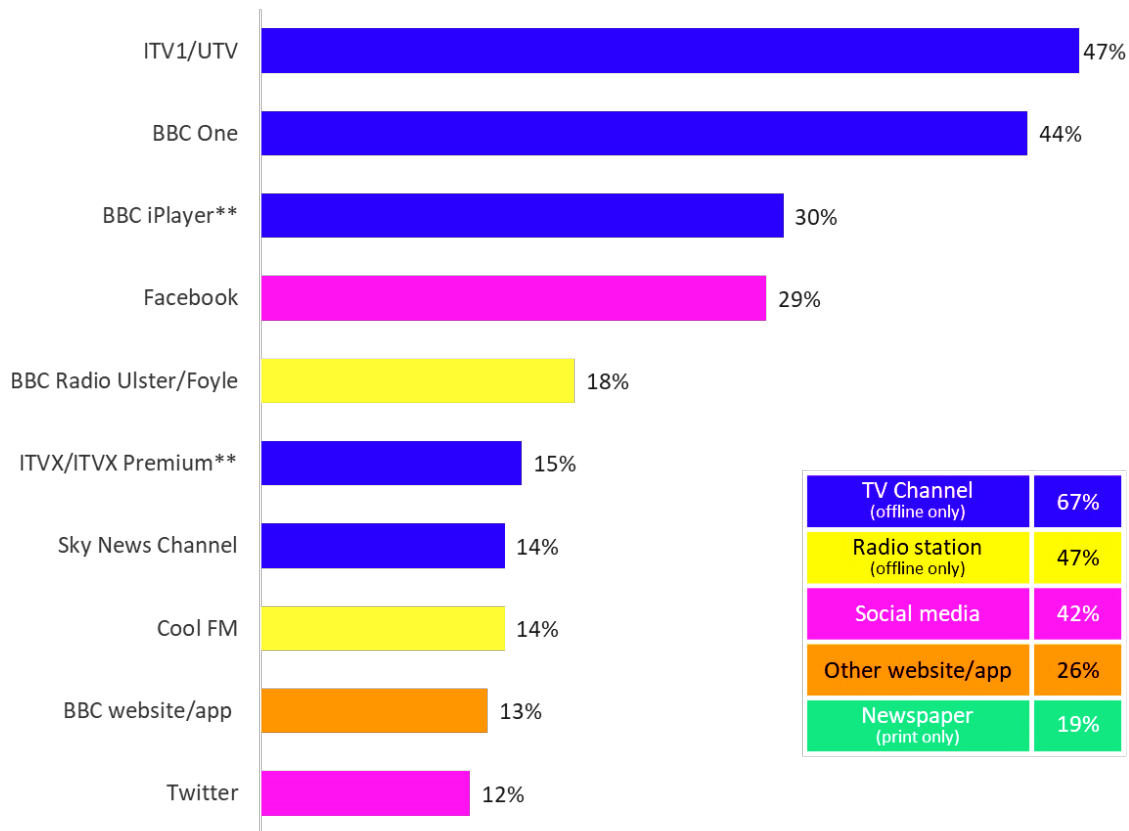
About half of adults in Northern Ireland use ITV1/UTV (47%) and BBC One (44%) for news in general. Sky News Channel was the only other TV channel in the top ten news sources used in Northern Ireland. Social media ranked highly too, with Facebook the fourth most-popular source of news (29%). The BBC website/app was the highest-ranking website or app (13%) and BBC Radio Ulster/Foyle was the most-cited radio station (18%). No newspapers made the top ten. This year Ofcom’s News Consumption Survey also collected figures relating to the use of video-on-demand

⁹ At the time of fieldwork for the Public Service Media Tracker, Channel 4’s BVoD service was called All 4 or All 4+ and ITV’s BVoD was ITV Hub or ITV Hub+.

¹⁰ BVoD viewers are defined as those who have watched at least one BVoD service in the past six months.

services – the most popular of these was BBC iPlayer, which 30% of adults in Northern Ireland use for news. ITVX (15%) also appeared in the top 20 news sources.

Figure 12: Top ten sources of news in general in Northern Ireland: 2023

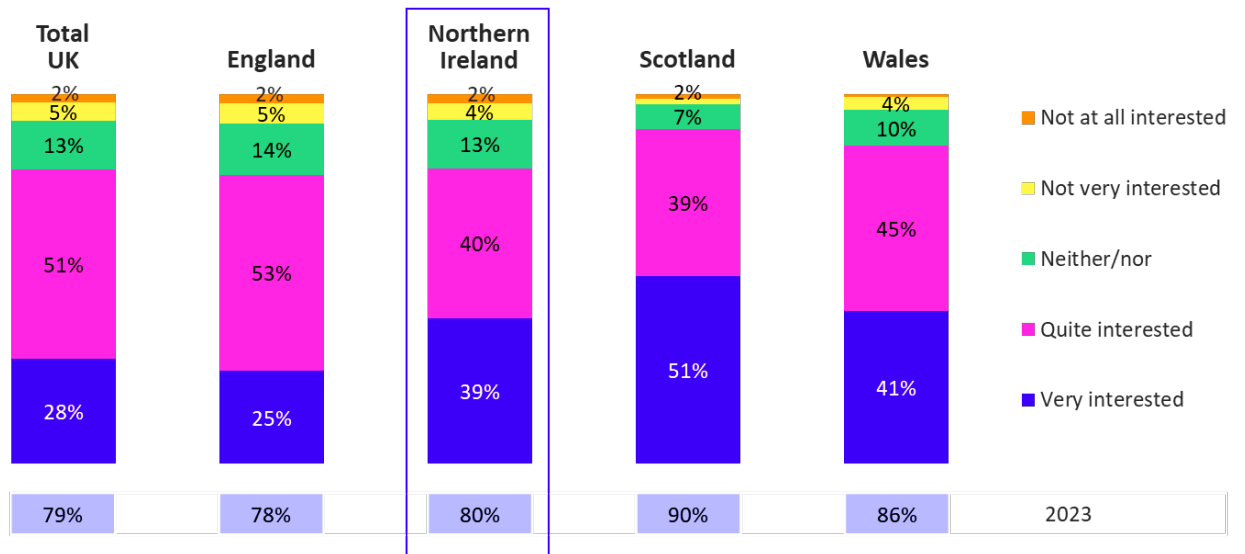


Source: Ofcom News Consumption Survey 2023 – Combined F2F and ONLINE sample Question: C1. Which of the following platforms do you use for news nowadays? D2a-8a. Thinking specifically about <platform>, which of the following do you use for news nowadays? Base: All adults 16+ in Northern Ireland - 2023=603 **BBC iPlayer and ITVX added in 2023.

Two in five adults who follow news claim to be ‘very interested’ in news about Northern Ireland (39%), rising to 80% who are either ‘very’ or ‘quite’ interested. As shown below, those who live in Northern Ireland, Scotland and Wales are more likely to be ‘very interested’ in news about their nation.

Television sources were the most popular sources for news about Northern Ireland, for people in the nation. Two in five used UTV for this (41%) which was more than BBC One (used by 34%), despite the two channels being used by similar proportions for news in general. Facebook (17%) and BBC Radio Ulster/Foyle (15%) were the most-used online and radio sources for news about Northern Ireland.

Figure 13: Level of interest in news about own nation, by nation: 2023



Source: Ofcom News Consumption Survey 2023 – Combined F2F and ONLINE sample Question: F3. How interested are you in news about your NATION/REGION? Base: All adults 16+ who follow news 2023 - Total=4371, England=2516, Scotland=665, Wales=627, Northern Ireland=563.

TV programming for and from Northern Ireland

The BBC and UTV provide programming specifically for viewers in Northern Ireland across a range of genres, with Ofcom collecting figures for three groups: (1) news, (2) current affairs, and (3) non-news/non-current affairs. There was a 16% increase in spending on first-run UK-originated content for viewers in Northern Ireland in 2022, with spend on non-news/non-current affairs increasing the most, at 44%. Non-news/non-current affairs accounts for the largest share of first-run spend (49%) in Northern Ireland.

The BBC's hours of first-run content in Northern Ireland grew by 3% in 2022 to 573 hours. Overall, news content made up the largest amount of the BBC's output for Northern Ireland, comprising 51% of first-run hours, which was in line with 2021.

Northern Ireland is also an important source of production for PSB content shown across the UK. Some 2.1% of qualifying network spend on the PSB channels was on Northern Ireland-based productions in 2022.

How we report spend on programming

The analysis in this section covers programming made in Northern Ireland for viewers in Northern Ireland as well as programming made in the nation and broadcast UK-wide. It focuses on first-run UK originations, which are programmes commissioned by or for a licensed public service channel with a view to their first showing on television in the UK in the reference year.

Spend on this content includes all costs incurred by the broadcaster associated with making programmes. These include both direct and indirect production costs for in-house productions and licensing costs for commissioned programmes, but exclude costs related to marketing and distribution.

How we present financial data

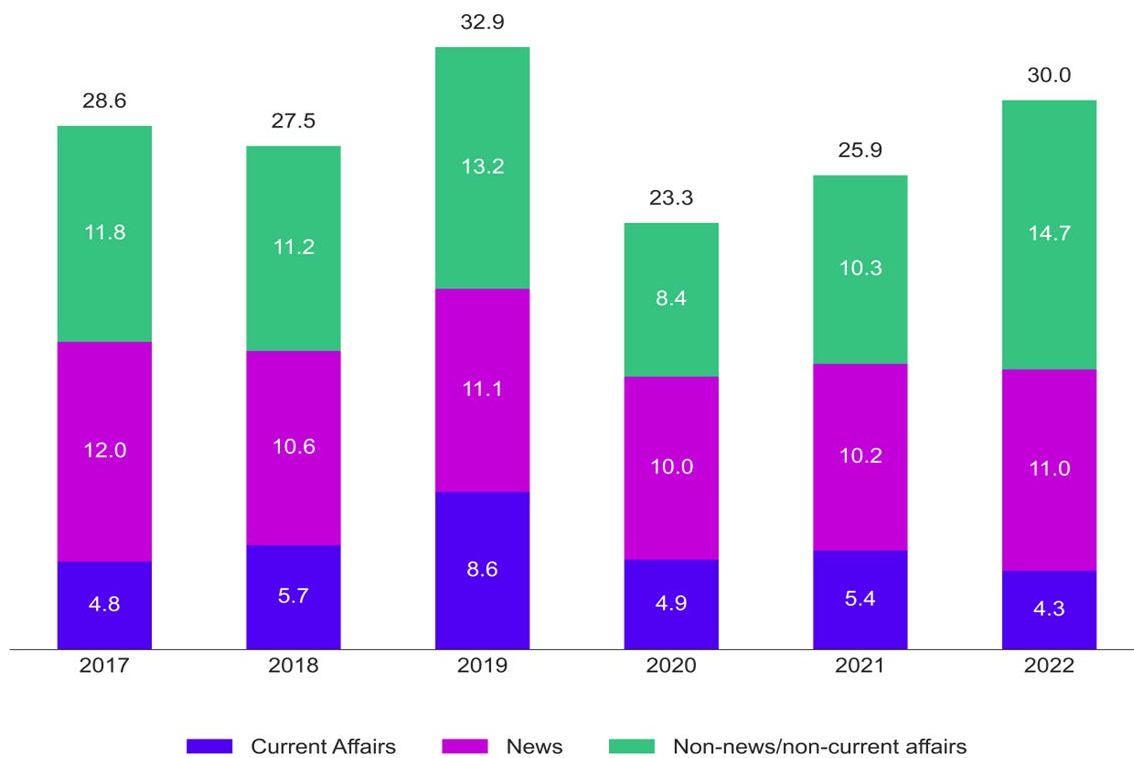
Financial data quoted in this report is presented in nominal terms, meaning that historical data has not been adjusted to account for inflation. In our interactive report, users can view financial data in either nominal or 'real' (CPI-adjusted) terms, with users easily able to switch between the two.

PSB spend on first-run content for Northern Ireland increased by 16% in 2022, mainly driven by non-news/non-current affairs (+44%) and, to a lesser extent, by news (+8%)

Of the total £30m spend, the majority went towards non-news/non-current affairs, at £14.7m; a year-on-year rise of £4.5m.

Non-news/non-current affairs had the largest proportional growth in first-run spend, increasing by 44% year on year to £14.7m. PSB spend on news programming for Northern Ireland has increased by 8%.

Figure 14: PSB spend on first-run UK-originated content for Northern Ireland, by genre: 2017-2022 (£m)



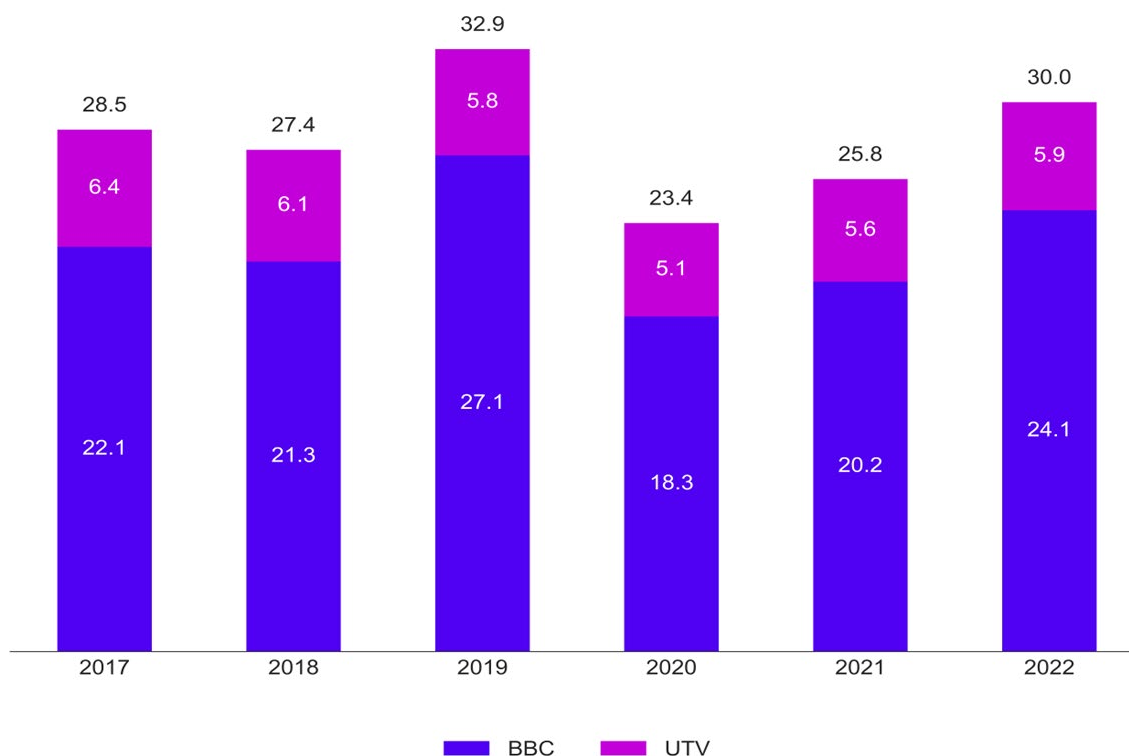
Source: Ofcom/broadcasters.

PSB spend on first-run content for Northern Ireland rose in 2022

The increase in spend on first-run content is driven by the BBC, for which spend for Northern Ireland increased by £3.9m, to £24.1m (up 19% compared to 2021). Much of this was driven by spend on non-news and non-current affairs programming.¹¹

Spend by UTV on first-run content for Northern Ireland also increased in 2022, by 5%.

Figure 15: BBC and UTV spend on non-network first-run UK-originated content for Northern Ireland: 2017-2022 (£m)



Source: Ofcom/broadcasters.

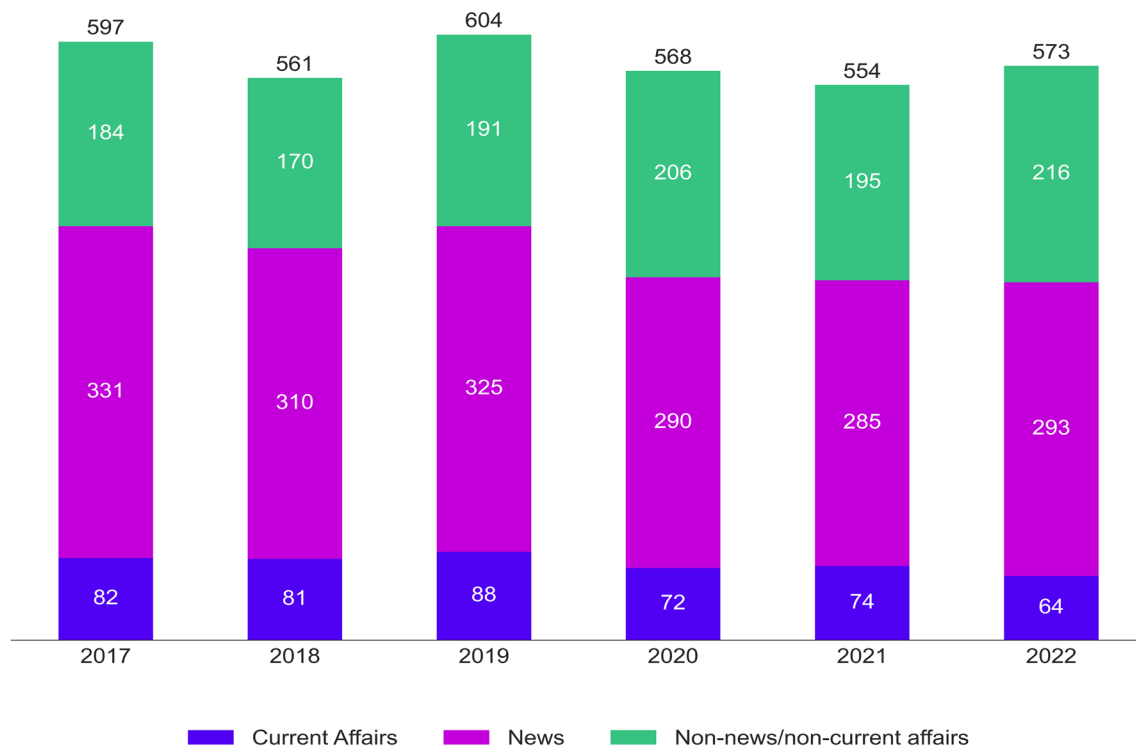
¹¹ This may include some co-commissions between BBC network and non-network services. In 2022, if such programmes were broadcast on regional opts first, the spend is captured as part of the BBC's regional programming spend.

BBC hours of first-run content in Northern Ireland grew by 3% in 2022 to 573 hours

The growth in hours has been driven by news and non-news/non-current affairs. The largest proportional decrease has been for current affairs, dropping by 10 hours to 64 hours (14%).

Overall, news content makes up the largest amount of the BBC's output for Northern Ireland, comprising 51% of first-run hours. This proportion is unchanged from 2021.

Figure 16: BBC hours of first-run UK-originated content for Northern Ireland, by genre: 2017-2022



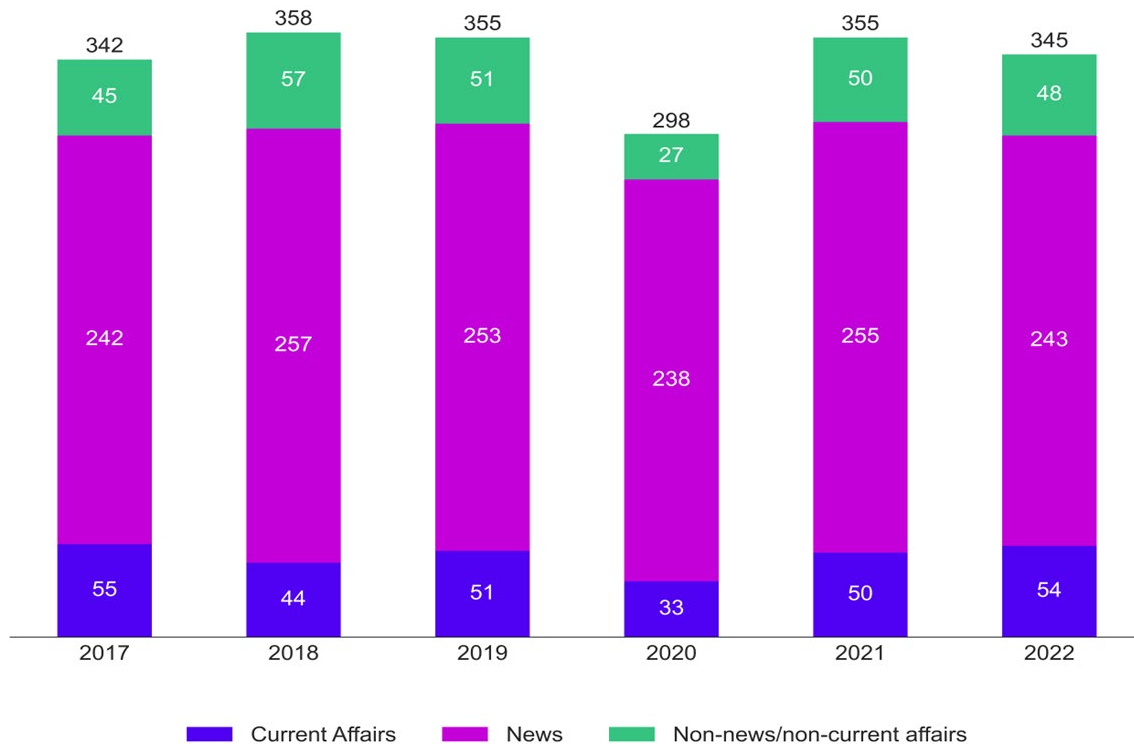
Source: Ofcom/broadcasters.

UTV hours of first-run content for Northern Ireland dropped year on year, with 345 hours of programme output in 2022

The vast majority of UTV output is news content, comprising 70% (243 hours) of first-run programming on the channel.

The decrease in hours has been driven both by news and non-news/non-current affairs, while UTV's current affairs output grew by 4 hours to reach 54 hours (8%).

Figure 17: UTV hours of first-run UK-originated content for Northern Ireland, by genre: 2017-2022



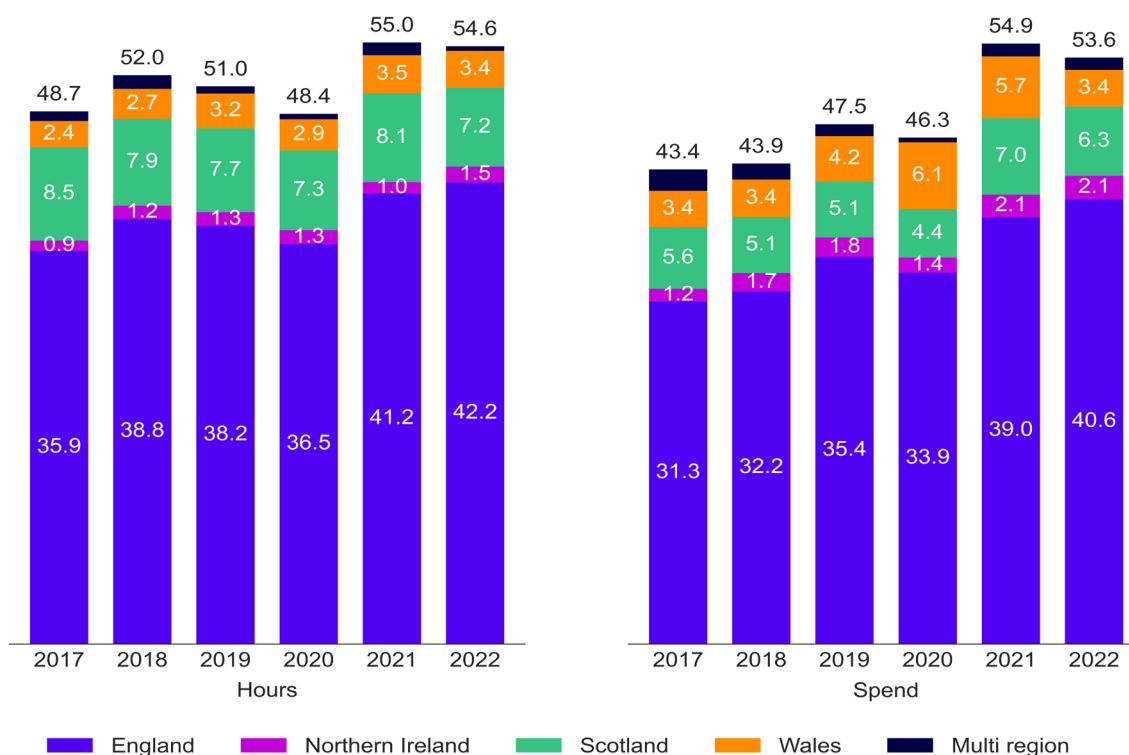
Source: Ofcom/broadcasters.

Network content produced in Northern Ireland

Public service broadcasters must make programmes in a range of places around the UK that are broadcast for the first time on their network TV channels. The broadcasters have quotas relating to this, in terms of the proportion of qualifying hours and qualifying spend that must be outside London. The BBC has individual quotas for each of the UK nations, and Channel 4 also has an out-of-England quota. ITV and Channel 5 are not specifically required to make content outside England.

Across all the PSBs, 2.1% of qualifying first-run network spend was allocated to programmes qualifying as Northern Ireland productions, and 1.5% of hours. The proportion of qualifying spend in Northern Ireland is lower than for the other nations and has fallen since 2021, but the proportion of qualifying hours was slightly up year on year.

Figure 18: Proportion of qualifying network hours and spend outside London, all PSBs combined: 2017-2022 (%)



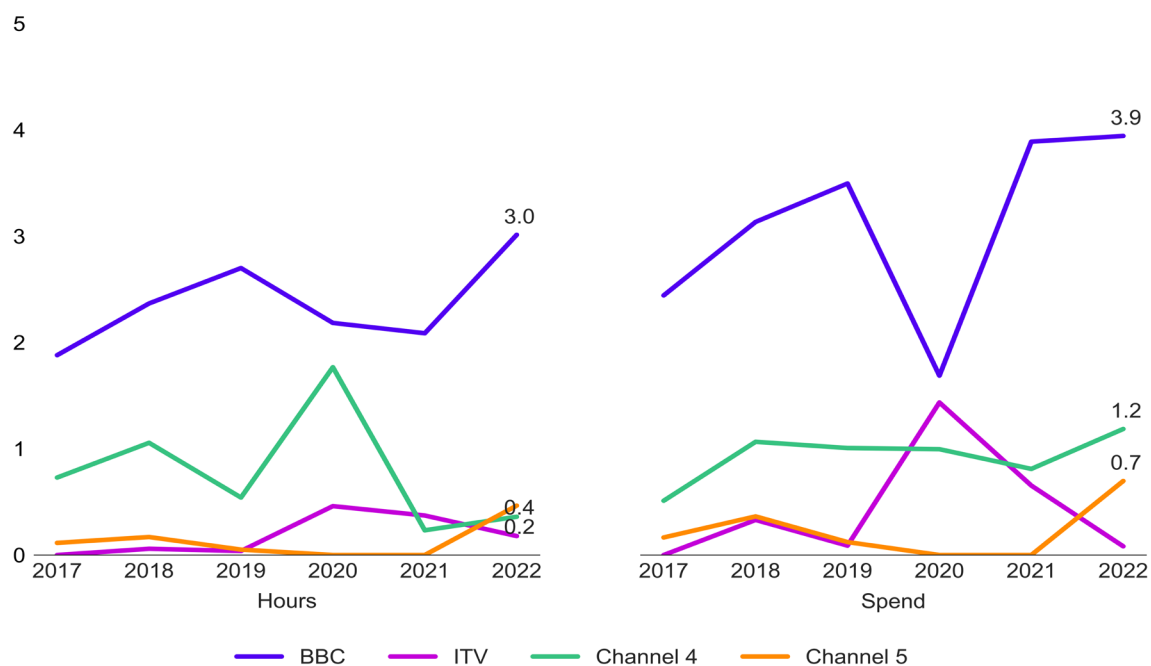
Source: Ofcom/broadcasters.

PSBs generally increased the proportion of network content made in Northern Ireland in 2022

Alongside the other PSBs, the BBC, which is responsible for the majority of qualifying network content made in Northern Ireland, maintained the proportion of its network spend in 2022 while its proportion of hours increased, to 3%. The increase in qualifying hours was generally well spread across genres, including drama titles such as *Hope Street* and *Conversations with Friends*, and factual titles such as *Critical Incident*. This year's [Made Outside London register](#) includes football and rugby coverage produced in Northern Ireland, and *Sunday Morning Live*, which returned to Belfast in 2022 after two years of being managed in Manchester.

Channel 4 and Channel 5 also increased spend and qualifying hours made in Northern Ireland. Notable titles contributing to this included the third season of *Derry Girls* on Channel 4 and new pre-school title *Mimi's World* on Channel 5.

Figure 19: Proportion of qualifying network production in Northern Ireland, by PSB: 2017-2022 (%)



Source: Ofcom/broadcasters.

The Irish Language Broadcast Fund provided £3.1m in funding in 2022-2023

The [Irish Language Broadcast Fund \(ILBF\)](#) was launched in 2005 with the aim of funding Irish-language content and fostering the Irish-speaking independent production sector in Northern Ireland.

Of the current funding, £3.15m comes from the UK Government's Department of Digital, Culture, Media and Sport, through the British Film Institute, and €1m from the Irish Government's

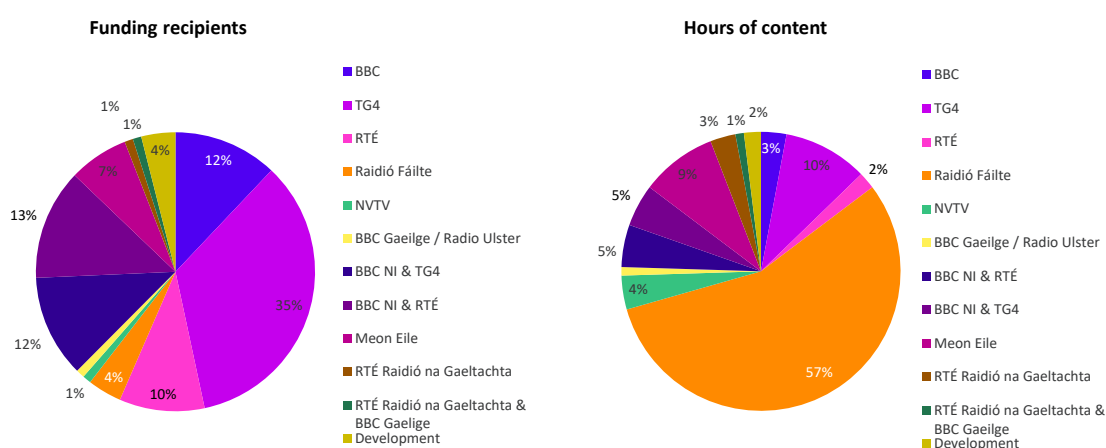
Department of Tourism, Culture, Gaeltacht, Arts, Sports and Media via Northern Ireland Screen, which manages the fund.

The ILBF continued to fund a wide range of Irish language content in 2022/23, for broadcast primarily on TG4, BBC Northern Ireland and RTÉ. The Fund also supported a range of digital and audio content.

Recent programming highlights include Lagan Media’s *An Diabhal Inti* (‘The Devil’s in Her’) on TG4 which explored how and why thousands of people, mostly women, were accused of being in league with the devil and executed as ‘witches’. Clean Slate’s documentary on the disappearance of Kingsley Arthur Porter from Inis Bó Finne, *Ar Iarraidh*, also aired on TG4 to good audience figures and critical acclaim. Below the Radar’s *Báisteach*, an international co-production with Welsh company Cwmi Da, Scottish company Mac TV and LIC International, aired on TG4 and BBC Alba, uncovers how rain plays a pivotal role in cultures. Imagine Media’s feature documentary, *An Buachaill Gealgháireach*, the story of how a song about Michael Collins, written by Brendan Behan, became one of the most popular songs in Greece, aired on TG4, following screenings at Docs Ireland, Galway Film Fleadh and Áras an Uachtaráin. It also won the audience award at the Thessaloniki International Film Festival and has received two nominations in the RTS NI awards. Below the Radar’s feature arts documentary *Paul Muldoon: Laoithe s’ Liricí*, which featured a ‘who’s who’ of Irish and international artists performing some of the poet’s work, aired on TG4 over Christmas and on the BBC in January, following screenings at the Cork International Film Festival, the London Irish Film Festival and QFT.

Other notable commissions included Táin Media’s *Seán Ó Riada: Mo Sheanathair*, which won the Oireachtas Communications Award for television programme of the year and is nominated at this year’s Celtic Media Festival Awards. Also nominated at the CMF awards are Aisling Ghéar’s radio drama series *An Eachtra* and *Raidió Fáilte*. Other RTS NI nominees include Doubleband Films’ feature drama *Doineann* and Big Mountain’s factual entertainment series *Croí Uladh*.

Figure 20: ILBF funding recipients / hours 2022-2023



Source: Northern Ireland Screen. Note: funding hours relate to financial commitments made during the financial year, but which may not have been broadcast in the same financial year.

The Ulster-Scots Broadcast Fund provided £1m in funding in 2022-23

The Ulster-Scots Broadcast Fund (USBF) was established in 2010 to provide finance for the production of film, television and other moving-image productions on Ulster-Scots heritage, culture and language in Northern Ireland.

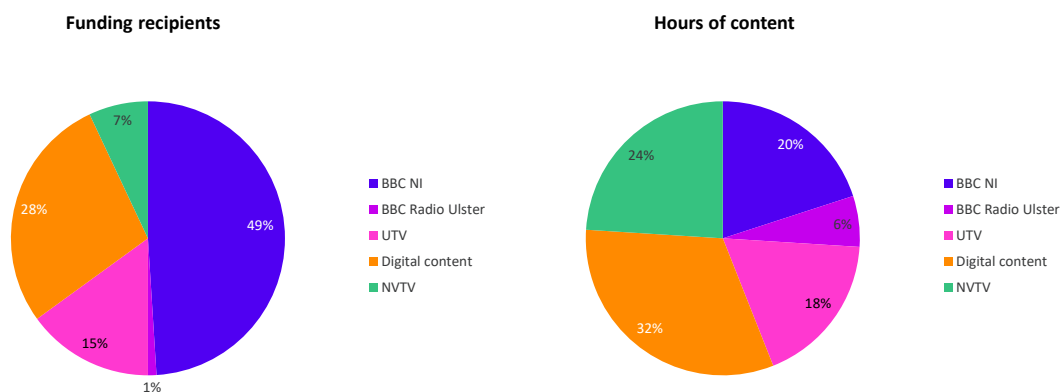
USBF funding, to the level of £1m, comes from the UK Department for Culture, Media and Sport through the British Film Institute to Northern Ireland Screen, which manages the fund.

Nineteen projects received funding from the Ulster-Scots Broadcast Fund (USBF) in 2022-23. These included six television productions, two radio productions, eight digital projects, one television development project and additional funding for two television productions.

USBF-funded content over the period included factual/entertainment, observational documentary and interactive content, including educational programming. Commissioned highlights included series 3 of the popular BBC NI cookery series *Paula McIntyre's Hamely Kitchen* and 12-part UTV television travelogue *Mahon's Way* series 3, in which presenter Joe Mahon uncovers the history, natural environment and cultural heritage of Northern Ireland, including areas with a particularly strong Ulster-Scots connection.

Broadcast and digital highlights included BBC NI *Paula McIntyre's Hamely Kitchen* series 2, *Making Northern Ireland* (The Nerve Centre), which is an online learning resource about the formation of Northern Ireland from an Ulster-Scots perspective, and the conclusion of UTV's 14-part travelogue *Mahon's Way* series 2.

Figure 21: USBF funding recipients / hours: 2022-2023



Source: Northern Ireland Screen. Note: funding hours relate to financial commitments made during the financial year, but which may not have been broadcast in the same financial year.

3. Radio and audio

Market developments

Digital multiplex licence award for Belfast

Small-scale DAB (SSDAB) is viewed as an ideal platform for community radio and smaller city-based commercial radio services to broadcast on a digital platform. SSDAB multiplexes can carry more than 20 digital radio services. The first SSSAB multiplex in Northern Ireland was awarded in 2021 and started broadcasting in August 2022 in Derry / Londonderry.

A second small-scale DAB multiplex is set to go on air in Northern Ireland in the coming months, increasing the number of stations available to listeners in Belfast and Lisburn.

Ofcom awarded the licence for the Belfast and Lisburn SSDAB multiplex (the transmission infrastructure that carries radio stations) to Lagan SSDAB. The company has 18 months from when it was awarded the licence (July 2022) to launch the multiplex.

Radio availability and coverage

Radio services in Northern Ireland are provided by the BBC and by the commercial and community radio sectors. Broadcasts from the Republic of Ireland can also be received in parts of Northern Ireland.

The BBC's UK-wide services are available throughout Northern Ireland on terrestrial analogue and DAB radio. In addition, the BBC broadcasts BBC Radio Ulster and BBC Radio Foyle on FM and DAB.

As of March 2023, there were two UK-wide commercial stations, ten local commercial stations and 16 community radio stations broadcasting on AM/FM in Northern Ireland. Fifty-eight stations broadcast on DAB, comprising 46 UK-wide commercial and 12 local commercial stations, unchanged since 2022.

Figure 22: Number of commercial and community radio services in Northern Ireland, by broadcast technology as of March 2023

| | AM/FM | DAB |
|--------------------|-------|-----|
| UK-wide commercial | 2 | 46 |
| Local commercial | 10 | 12 |
| Community | 16 | N/A |

Source: Ofcom. Note: the number of services on commercial multiplexes listed here includes all commercially-licensed services carried on each multiplex, meaning that a service may be counted more than once. Not all services are available in each location. Community Radio licences are analogue licences, but holders of these licences may also hold a commercial DSP (digital sound programme) licence to simulcast their licensed Community Radio service on a DAB multiplex. The data in the table relate to UK-wide and local multiplexes only. Community-DSP (C-DSP) licences allow for a community radio service to be broadcast on a designated small-scale DAB multiplex.

The coverage of national and local DAB multiplexes was unchanged in March 2023 from the previous year. BBC DAB services covered nearly nine in ten homes (87.3%) and 79.3% of major roads, while local commercial DAB services covered the same proportion of homes (87.5%) and a slightly higher proportion (87.8%) of major roads.

Figure 23: DAB coverage as of March 2023

| | | BBC | | Commercial | | Small-scale |
|------------------|-------------|-------|-------------|---------------|-----------|-------------|
| | | | Digital One | Sound Digital | Local DAB | |
| UK | Homes | 97.4% | 91.7% | 82.6% | 92.0% | 13.8% |
| | Major roads | 87.4% | 80.2% | 72.6% | 76.8% | NM |
| England | Homes | 98.4% | 94.8% | 86.7% | 93.4% | 12.8% |
| | Major roads | 94.5% | 93.9% | 89.8% | 87.4% | NM |
| Scotland | Homes | 95.3% | 81.7% | 69.0% | 85.4% | 24.9% |
| | Major roads | 69.1% | 45.5% | 33.6% | 45.6% | NM |
| Wales | Homes | 92.2% | 67.5% | 56.9% | 82.6% | 15.5% |
| | Major roads | 78.1% | 53.3% | 37.7% | 60.9% | NM |
| Northern Ireland | Homes | 87.3% | 85.4% | 56.8% | 87.5% | 5.6% |
| | Major roads | 79.3% | 86.9% | 55.0% | 87.8% | NM |

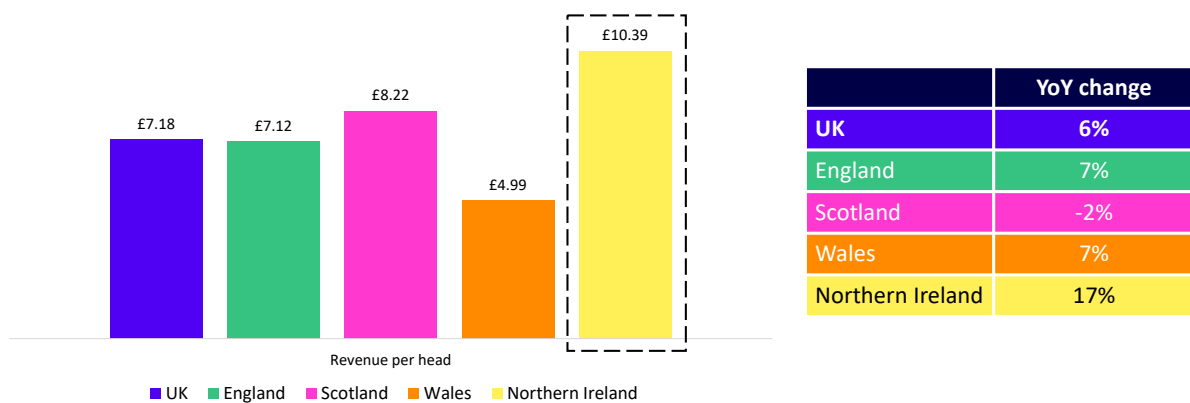
Source: Arqiva, BBC, Ofcom. Note: Coverage of SSDAB is measured on a homes basis only. 'NM' denotes levels are not measured.

Commercial radio revenues

Per-capita commercial radio revenues grew in Northern Ireland between 2021 and 2022

Per-capita commercial local radio revenues grew by 17% year on year in Northern Ireland to a total of £10.34 per capita.

Figure 24: Per-capita commercial radio revenues, by nation: 2022 (£)



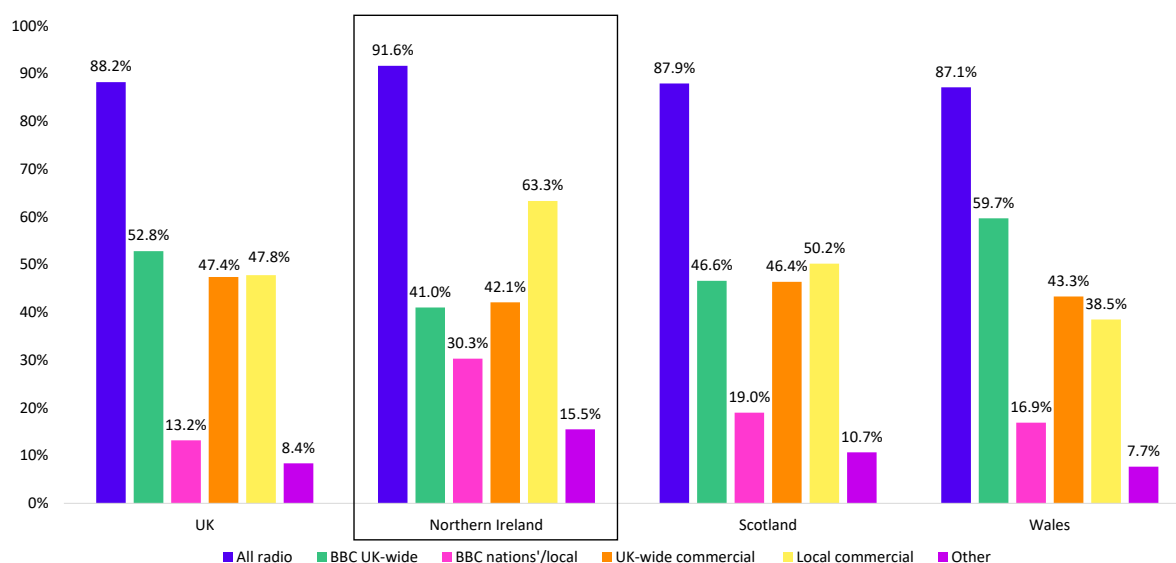
Source: Ofcom, broadcaster returns. These figures solely relate to relevant turnover reported against AL licences (local analogue commercial) and include local and national revenues and sponsorship, i.e., not only the revenues which relate to adverts aimed at the specific nation. As mid-year 2022 population estimates were not available at the time of publication, 2021 mid-year population data has been used for both 2021 and 2022.

Radio listening in Northern Ireland

More people listen to radio in Northern Ireland than in other nations in the UK

Radio listening continues to be healthy in Northern Ireland, with almost 92% of the adult population (1.4 million) tuning for an average of 19 hours 54 mins each week.¹² Figure 25 shows the reach of different broadcast sectors and how they vary by nation. More than six in ten adults in Northern Ireland (63.3%) listen to local commercial radio at least once a week – higher than in Scotland, Wales and the UK as a whole – and three in ten (30.3%) listen to the BBC’s nations’/local output.

Figure 25: Weekly reach of radio, by sector and nation: Q1 2023



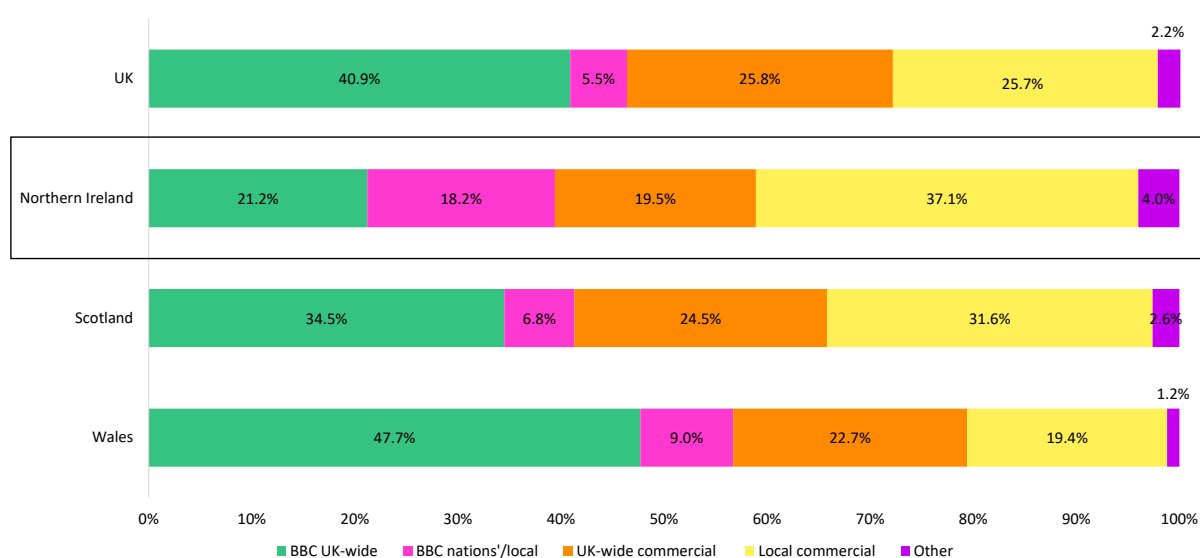
Source: RAJAR Q1 2023; All radio TSA, BBC Radio Ulster TSA, BBC Radio Scotland TSA, BBC Radio Wales TSA.

Local radio continues to be the most popular form of radio in Northern Ireland

Local radio is particularly strong in Northern Ireland, accounting for more than half (54%) of total radio listening compared to 30% across the UK as a whole. The majority of this listening is to local commercial radio, while UK-wide commercial stations fare less well in Northern Ireland (as illustrated in Figure 26).

¹² Source: RAJAR Q1 2023

Figure 26: Share of radio listening, by sector and nation: Q1 2023



Source: RAJAR Q1 2023; All Radio; BBC Radio Ulster TSA, BBC Radio Scotland TSA; BBC Radio Wales TSA; six-month weighting.

Drilling down further, there is variation across Northern Ireland in the services people listen to. BBC Radio 2 was the only UK-wide station to feature in the top five most-listened to services across Northern Ireland in Q1 2023, while local commercial stations Cool FM, Downtown Radio (both Bauer) and U105 (News Broadcasting, formerly Wireless Group) were all in the top five across Belfast and Northern Ireland. BBC Radio Ulster was again the most popular station in terms of amount of listening, with a market share of 18.1% across Northern Ireland and 15.4% in Belfast.

Figure 27: Top five stations in Northern Ireland and Belfast, ranked by market share: Q1 2023

| Top stations across Northern Ireland | | | | Top stations across Belfast | | | |
|--------------------------------------|------------------|----------------|----------------|-----------------------------|------------------|----------------|----------------|
| Rank | Station | Weekly reach % | Market share % | Rank | Station | Weekly reach % | Market share % |
| 1 | BBC Radio Ulster | 29.6 | 18.1 | 1 | BBC Radio Ulster | 27.1 | 15.4 |
| 2 | Cool FM | 31.7 | 12.3 | 2 | Cool FM | 33.3 | 14.2 |
| 3 | Downtown Radio | 18.7 | 8.8 | 3 | U105 | 23.9 | 9.1 |
| 4 | BBC Radio 2 | 15.2 | 8.1 | 4 | BBC Radio 2 | 15.3 | 7.6 |
| 5 | U105 | 14.3 | 5.4 | 5 | Downtown Radio | 11.8 | 6.1 |

| Key | BBC UK-wide | BBC nations'/local | UK-wide commercial | Local commercial |
|-----|-------------|--------------------|--------------------|------------------|
|-----|-------------|--------------------|--------------------|------------------|

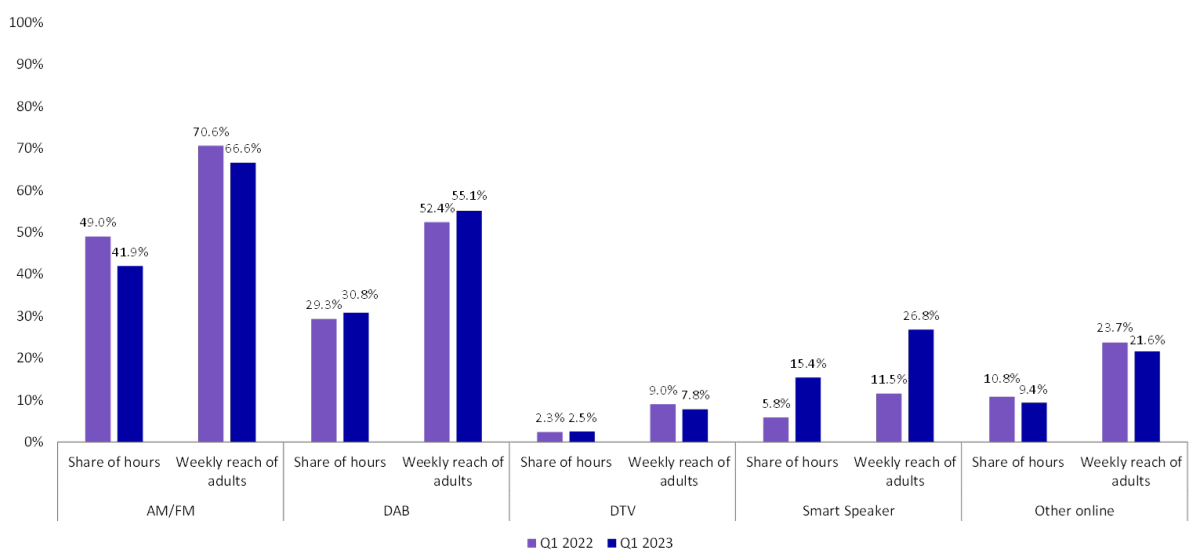
Source: RAJAR Q1 2023; BBC Radio Ulster TSA; U105 Belfast TSA; six-month weighting.

Analogue continues to be the leading platform in Northern Ireland, although DAB reach is at a record high

The popularity of local radio and Northern Ireland / Ireland-based stations means that analogue continues to outperform digital and online in terms of both reach and share. AM/FM radio is used by two-thirds of adults in Northern Ireland each week, accounting for 41.9% of total listening.

Although analogue is still the most popular platform for live radio listening, the number of people using DAB in Northern Ireland is at a record high, reaching 55.1% of adults each week. DAB’s share of listening hours also increased by three percentage points between Q1 2022 and Q1 2023, while analogue’s share fell by seven percentage points as radio listening on smart speakers more than doubled.

Figure 28: Weekly reach and share of radio listening hours in Northern Ireland, by platform

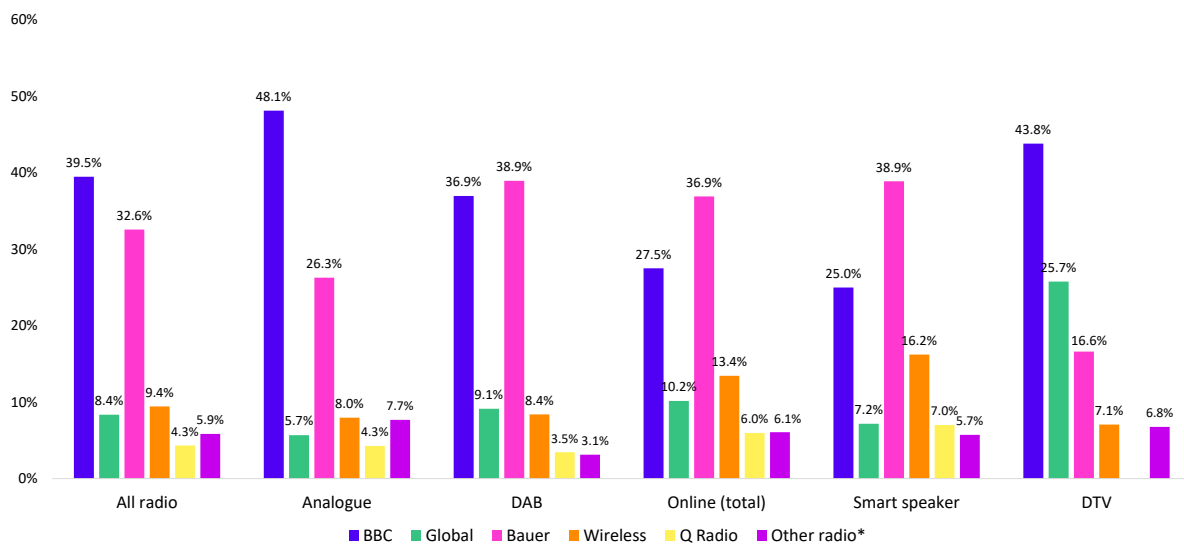


Source: RAJAR; BBC Radio Ulster TSA.

Smart speakers are becoming increasingly popular for radio listening

The biggest year-on-year change, however, is in the use of smart speakers, with over a quarter of adults in Northern Ireland (26.8%) now using them to listen to the radio each week. Smart speakers accounted for 15.4% of total listening hours in Q1 2023, more than double last year’s share of 5.8%. Bauer has the biggest share of radio listening on smart speakers in Northern Ireland at 39%, in line with the popularity of its stations and overall market share, as highlighted above. The BBC is the next most listened to broadcaster on smart speakers, accounting for a quarter of radio listening on these devices.

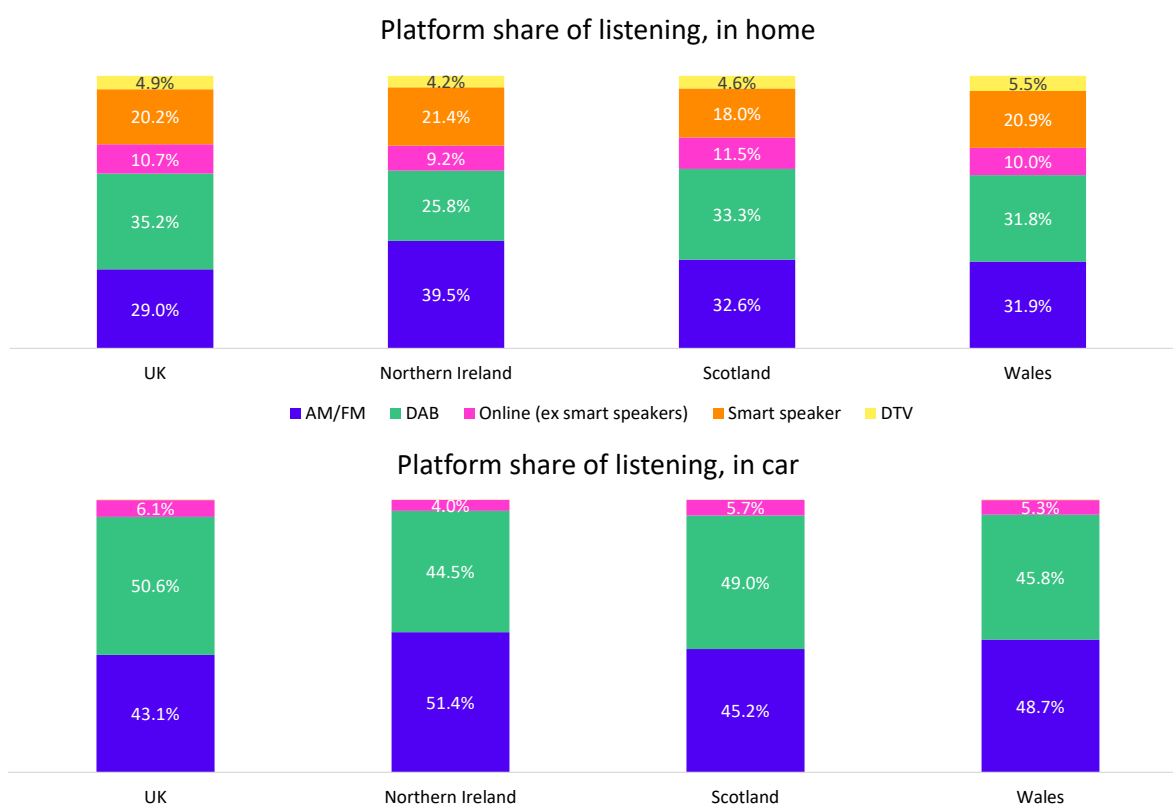
Figure 29: Broadcasters' market share, by platform: Northern Ireland: Q1 2023



Source: RAJAR; BBC Radio Ulster TSA.

People's choice of platforms for radio listening depends largely on where they are and the devices they have access to. Across the UK as a whole, 62% of time spent listening is in the home, followed by 24% while in a car or van, and 14% at work. This is broadly similar for Wales and Scotland, but in Northern Ireland slightly less is in the home (57%) with more occurring in the car (26%) and at work (18%). This could be influenced by the slightly younger average age of the Northern Ireland population (47, vs 49 for the UK as a whole, according to RAJAR). Figure 30 shows that there are differences in the way people listen to the radio at home and in the car. It clearly shows the greater reliance on AM/FM for listeners in Northern Ireland compared to the UK as a whole and the other nations.

Figure 30: Platform share of listening, by nation: at home and in the car: Q1 2023



Source: RAJAR Q1 2023.

Listening to the radio is not the only way in which people use their smart speakers. In the next section we take a closer look at take-up and use of these devices, as well as wider trends in online audio listening.

Online listening in Northern Ireland

Four in ten households in Northern Ireland have a smart speaker, while three in ten have a DAB radio set in the home

Just over four in ten households (43%) in Northern Ireland have a smart speaker, in line with the UK as a whole (42%).¹³ The Amazon Echo is by far the most popular brand, with just over four in five homes (82%) with smart speakers having one, followed by the Google Home / Google Nest at 13%.¹⁴ The most popular place to have a smart speaker is the kitchen, with half of all smart speaker owners having one there, followed by the living room (45%) and bedroom (27%).¹⁵

¹³ Ofcom Technology Tracker 2023; Base: All Respondents (UK weighted base: 3997, NI weighted base: 120)

¹⁴ Ofcom Technology Tracker 2023; Base: Where have a smart speaker or smart display (UK weighted base: 1679, NI weighted base: 52)

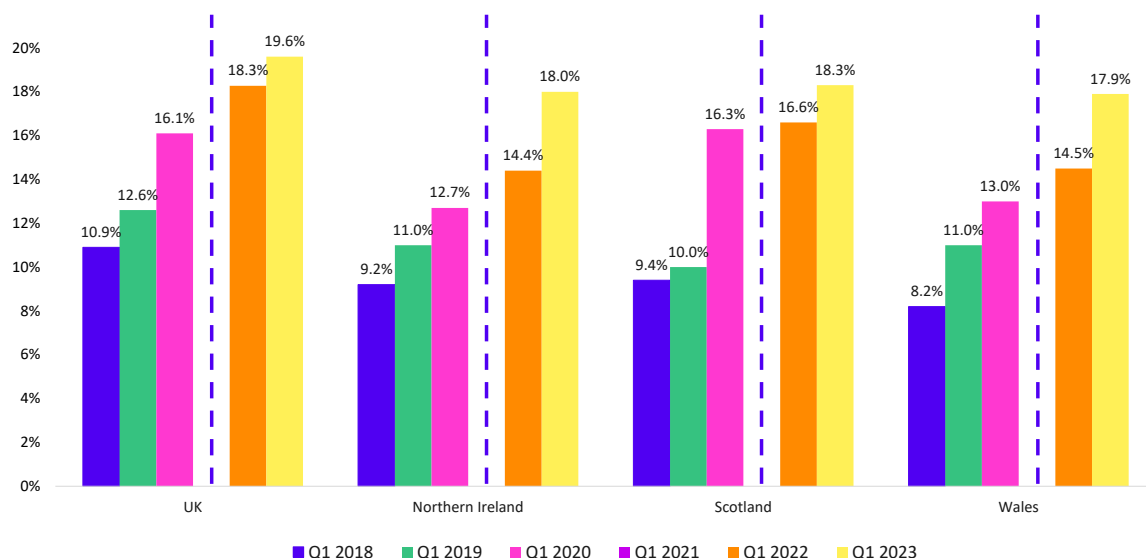
¹⁵ Ofcom Technology Tracker 2023; Base: Where have a smart speaker or smart display (UK weighted base: 1679, NI weighted base: 52)

In comparison, just under three in ten (27%) households in Northern Ireland have a DAB radio at home and four in ten (44%) have one in the car, taking total household penetration of DAB radios to 54%.¹⁶ Ofcom will soon be publishing findings from quantitative research commissioned to assess the penetration and use of DAB+ radio in home and in cars. DAB+ is the latest technology for digital audio broadcasting and is more efficient than standard DAB.

More people are listening to podcasts, but less than one in five adults listen each week

Of course, smart speakers allow people to listen to more than just radio, notably online audio content such as podcasts. Podcasts are slowly but surely becoming a fixture of people’s audio diet, with nearly one in five (18%) adults in Northern Ireland listening to them once a week in Q1 2023. This is slightly less than the UK reach figure of 19.6%, but still approximately double the 2018 figure (9.2%) and 4.6 percentage points higher than a year ago.

Figure 31: Weekly reach of podcast listeners, by nation: 2018-2023



Source: RAJAR; dotted lines indicate suspension of fieldwork and change in methodology. Comparison with previous quarters should be made with caution.

¹⁶ Ofcom Technology Tracker 2023; Base: All Respondents (UK weighted base: 3997, NI weighted base: 120)