

## 2 Television and audio-visual content

### 2.1 Recent developments in Northern Ireland

#### **NI Assembly given more oversight of the BBC**

The Northern Ireland Executive is being given more oversight of the BBC. As part of a Memorandum of Understanding (MoU) signed in October 2015, the Executive was given a formal consultative role in the process of the BBC Charter Review.

Once granted, the MoU will commit the BBC to send its annual report and accounts to the Executive, and to lay these before the Assembly.

The MoU also includes a commitment from the BBC to appear before Assembly committees on matters relating to Northern Ireland.

#### **ITV takeover of UTV completed**

UTV Media plc completed the sale of its TV interests in February 2016. The deal saw the company's TV stations in Northern Ireland (UTV) and the Republic of Ireland (UTV Ireland) transfer to ITV plc. Under the terms of its licence, which was renewed in January 2015, UTV has to deliver a minimum weekly quota of four hours of regional news and two hours of regional non-news programming (of which 26 minutes must be current affairs).

As part of the takeover process, Ofcom carried out a Change of Control Review. During the course of this review Ofcom approved a proposal from ITV to increase UTV's regional current affairs quota from 26 to 33 minutes per week, and varied the licence accordingly.

In June, News Corp. agreed to buy the remainder of UTV Media (rebranded Wireless Group), which includes radio stations in Britain and Ireland, in a reported £220m deal.

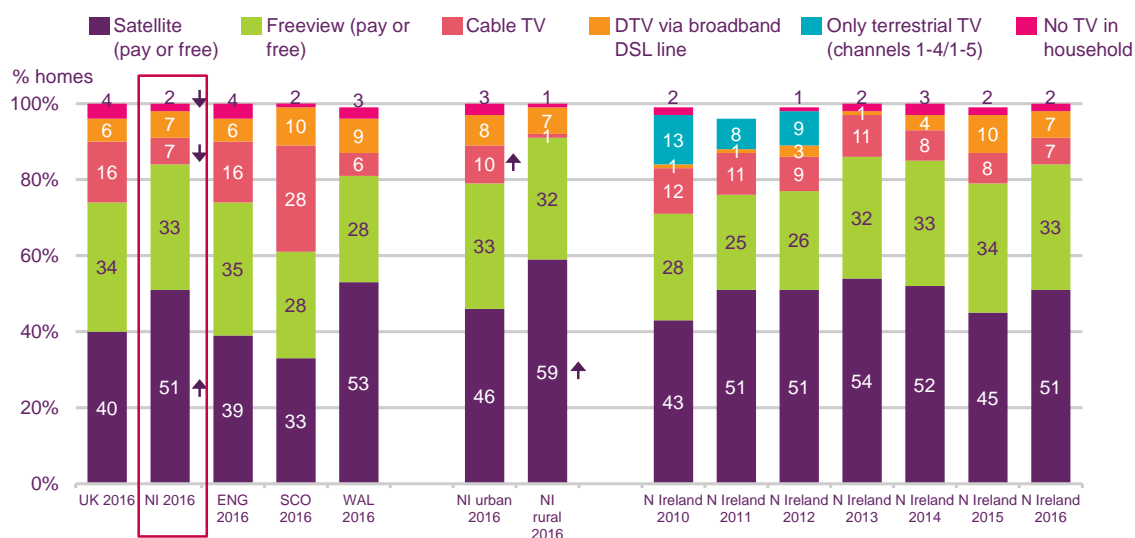
### 2.2 Television platform take-up in Northern Ireland

#### **Half of all households in Northern Ireland have satellite television as their main TV platform – higher than the UK average**

Figure 2.1 shows that in 2016, satellite television (pay or free) remained the main TV service in Northern Ireland (51%). Around one in three households had Freeview, and less than one in ten had cable TV or DTV via a broadband connection.

Compared to the UK as a whole in 2016, households in Northern Ireland were more likely to have satellite television (51% vs. 40%) and less likely to have cable TV (7% vs. 16%) or no television in the household (2% vs 4%). Take-up of Freeview and DTV services via broadband was similar across urban and rural areas of Northern Ireland.

**Figure 2.1 Main television set share, by platform**



Source: Ofcom Technology Tracker, H1 2016

Base: All adults aged 16+ (n = 3737 UK, 507 Northern Ireland, 2239 England, 502 Scotland, 489 Wales, 262 Northern Ireland urban, 245 Northern Ireland rural, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013, 499 Northern Ireland 2014, 504 Northern Ireland 2015, 507 Northern Ireland 2016)

Significance testing: Arrows indicate any significant differences between Northern Ireland and UK in 2016, between Northern Ireland urban and rural in 2016 and between Northern Ireland 2015 and 2016

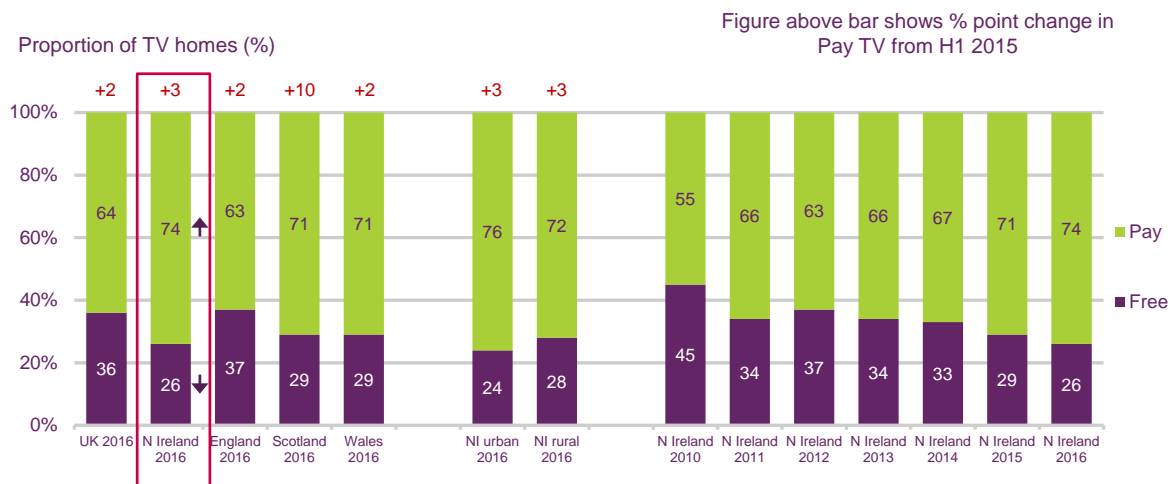
QH1A: Which, if any, of these types of television does your household use at the moment?

### Households in Northern Ireland continue to be more likely than the UK as a whole to have pay TV

Northern Ireland continued to have a higher than average proportion of TV homes with a pay-TV service: three in four households with a TV (74%) were reported to have paid-for satellite, cable or broadband TV, compared to two-thirds (64%) of the UK overall.

The proportion of TV homes in Northern Ireland in 2016 with a pay-TV service had not significantly changed year on year (71% in 2015 and 74% in 2016) and continues to be similar in both urban (76%) and rural (72%) areas.

**Figure 2.2 Proportion of homes with free and pay television**



Source: Ofcom Technology Tracker, H1 2016

Base: All adults aged 16+ with a TV in household (n = 3606 UK, 496 Northern Ireland, 2148 England, 491 Scotland, 471 Wales, 254 Northern Ireland urban, 242 Northern Ireland rural, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 492 Northern Ireland 2013, 488 Northern Ireland 2014, 462 Northern Ireland 2015, 496 Northern Ireland 2016)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Northern Ireland and UK in 2016, between Northern Ireland urban and rural in 2016 and between Northern Ireland 2015 and 2016. Circles around the +/- figures above the chart indicate any significant difference between 2015 and 2016 for Northern Ireland, urban and rural.

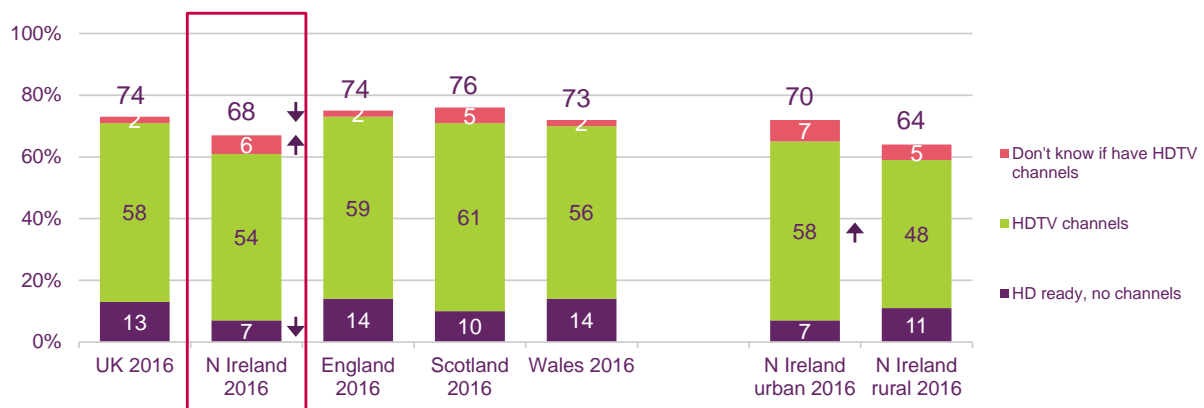
QH1A: Which, if any, of these types of television does your household use at the moment?

### Over half of TV households in Northern Ireland received HDTV services, in line with the UK average

Just over two-thirds (68%) of TV households in Northern Ireland claimed to own an HD-ready TV set in 2016, lower than the UK average (74%). Of these, over half (54%) said they received HD channels. Less than one in ten (7%) said they did not, lower than the UK average of 13%.

The proportion of households claiming to own an HD-ready TV set did not vary significantly by location (70% urban vs. 64% rural). However, households in urban areas were more likely than those in rural areas to say they had a TV set that did receive HDTV channels (58% vs. 48%).

**Figure 2.3 Proportion of homes with HD television**



Source: Ofcom Technology Tracker, H1 2016

Base: All adults aged 16+ with a TV in the household (n = 3606 UK, 496 Northern Ireland, 2148 England, 491 Scotland, 471 Wales, 254 Northern Ireland urban, 242 Northern Ireland rural)

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

QH53: Is the main TV in your household an HDTV set or HD ready?/ QH4: Although you have an HDTV ready set, to actually watch TV channels and programmes that are broadcast in high definition, you need an HD set top box or a TV with built-in HDTV receiver. For the main TV set, does your household have an HD TV service?

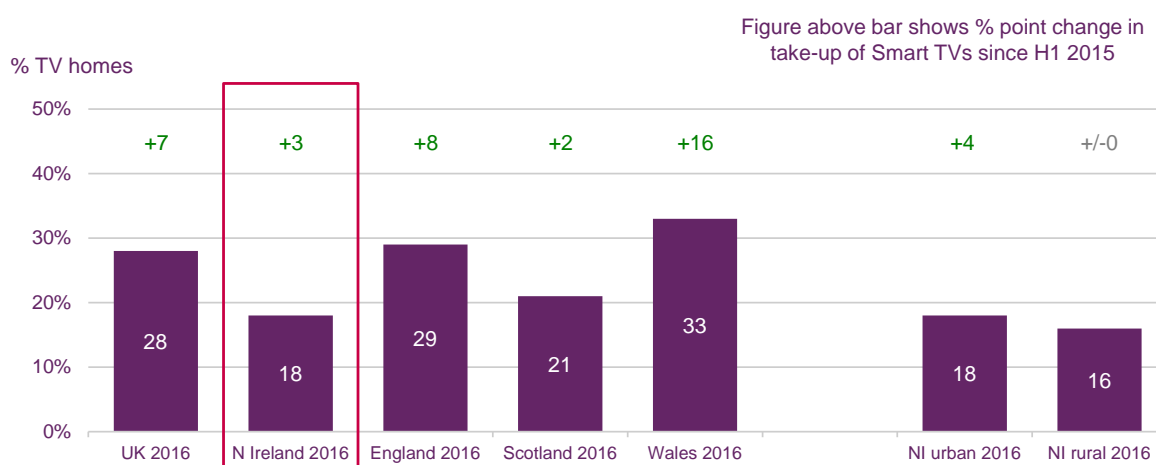
### A fifth of TV households in Northern Ireland have a smart TV

Among those with a TV set in the household, 18% claimed to have a smart TV, which has not changed significantly since 2015.

Compared to the UK overall, as last year, smart TV ownership is lower in Northern Ireland (18% vs. 28%). Levels of smart TV ownership did not differ between TV households in urban and rural areas in Northern Ireland.

Using a smart TV's inbuilt internet functionality is only one way of connecting a TV to the internet. Set-top boxes, game consoles and dongles can also be used to make a TV internet-enabled. The proportion of households in Northern Ireland with a connected TV is likely to be greater than the smart TV take up figure of 18%.

**Figure 2.4 Smart TV take-up**



Source: Ofcom Technology Tracker, H1 2016

Base: All adults aged 16+ with a TV in household (n = 3606 UK, 496 Northern Ireland, 2148 England, 491 Scotland, 471 Wales, 254 Northern Ireland urban, 242 Northern Ireland rural)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Northern Ireland and UK in 2016 and between Northern Ireland urban and rural in 2016. Circles around the +/- figures above the chart indicate any significant difference between 2015 and 2016 for Northern Ireland, urban and rural.

QH62: Are any of your TV sets smart TVs? These are new types of TV that are connected to the internet and can stream video directly onto your television screen, without the need for a computer, set-top box or games console.

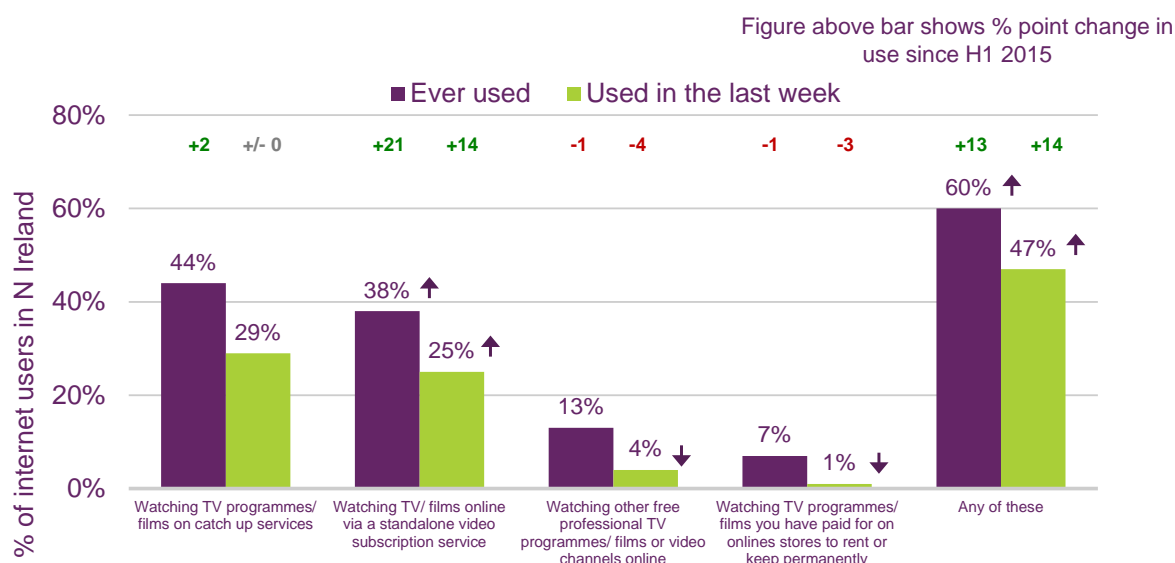
### **Catch-up services and stand-alone video subscription services are equally popular ways of watching TV programmes and films online**

Among those who use the internet at home or elsewhere (e.g. on their smartphone, tablet or laptop), more than two in five say they have ever watched TV programmes or films on a catch-up service (e.g. BBC iPlayer, All4, Demand 5, Sky On Demand). Just under one in three internet users claimed to have watched these services in the past week. Both of these are comparable to 2015 figures.

Around four in ten internet users have ever used stand-alone video subscription services (e.g. Netflix, Amazon Prime) with a quarter having done so in the past week. Both of these figures have increased since 2015.

Four in ten adults in Northern Ireland who use the internet at home or elsewhere have never used any of these services, lower than in 2015.

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



Source: Ofcom Technology Tracker, H1 2016

Base: All NI adults aged 16+ who use the internet at home or elsewhere (n = 395)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Northern Ireland 2015 and 2016

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? / QH47: And which, if any, of these have you used in the last week?

## 2.3 Broadcast television content

### Definitions

#### Broadcast TV viewing

BARB analysis is based on viewing of scheduled TV programmes such as those listed in TV listings magazines or on electronic programme guides (EPGs) on TV sets. Broadcast TV viewing refers to programmes watched on the TV set live at the time of broadcast, or 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.

Channel groups are referred to as 'main five PSB channels', 'PSB portfolio channels' and 'PSB family' or 'PSB broadcaster' channels. These are defined as:

#### Main five PSB channels:

BBC One, BBC Two, Channel3/ITV (inc ITV Breakfast), Channel 4 and Channel 5. Includes HD variants but excludes +1s.

#### PSB portfolio channels:

BBC: BBC Three, BBC Four, BBC News, BBC Parliament, CBBC, CBeebies, BBC red button channels

ITV: Channel3/ITV+1 , ITV2, ITV3, ITV4, CITV, ITVBelTV Encore

Channel 4: Channel 4+1, E4, More4, Film4, 4Music, 4seven,

Channel 5: Channel 5+1, Channel 5+24, 5\*, 5USA, Spike.

+1 and HD variants are included where applicable.

**PSB family or PSB broadcaster channels:**

The main five PSB channels and all PSB portfolio channels combined

All viewing data is based on individuals aged 4+.

**People in Northern Ireland spend an average of 3 hours 45 minutes per day watching TV**

In 2015, people in Northern Ireland spent an average of 3 hours, 45 minutes per day watching television, less than in the other devolved nations but more than the UK average of 3 hours 36 minutes. Of the total time spent watching television, 2 hours and 36 minutes was spent watching the PSB family of channels.

**Figure 2.6 Average minutes of television viewing per day, by nation: 2015**

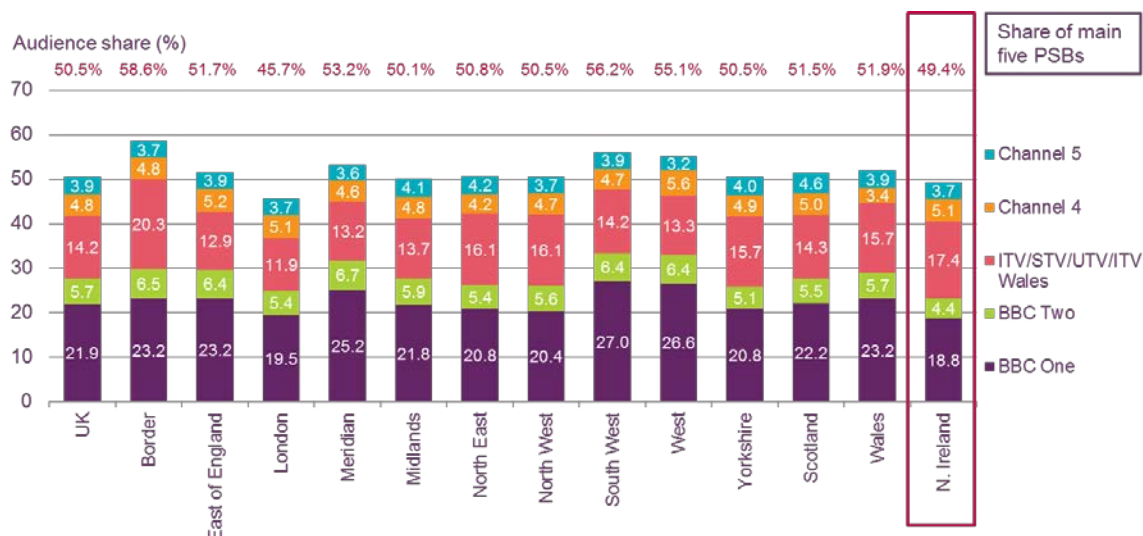


Source: BARB, individuals (4+). \*Note: This figure reflects the average across the ITV English regions with the highest in Border at 4 hours 10 minutes and lowest in West at 3 hours 17 minutes respectively.

**Just under half of all viewing is to the main five PSB channels**

In 2015, the main five PSB channels accounted for a combined 49.4% share of total TV viewing in Northern Ireland, the only nation in which the share of viewing to the main five PSB channels fell below the majority of viewing. BBC One and Two had lower shares in Northern Ireland than in any other UK nation or region, while UTV performed strongly, second only to Border in share. Channel 4's share was above the UK average while Channel 5's share was broadly in line.

**Figure 2.7 Share of the main five PSB channels in all homes, by UK nations and regions: 2015**



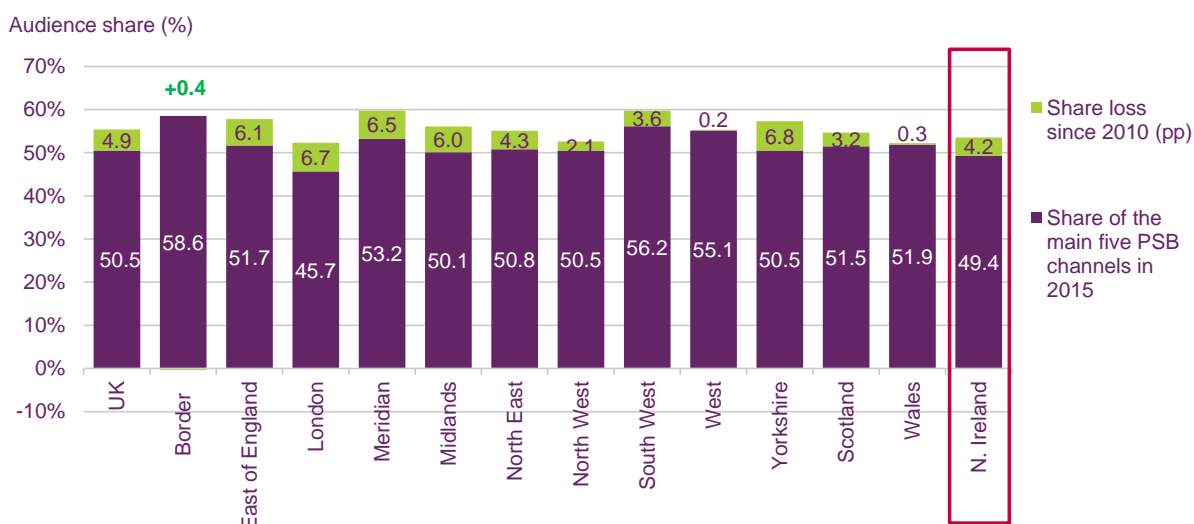
Source: BARB, individuals (4+). Note: Chart shows figures rounded to one decimal place. Numbers may not appear to sum up to total share of main five PSBs due to rounding.

**The combined share of the main five PSB channels has decreased since 2010 but with a smaller decrease than the UK average**

Between 2010 and 2015 there was a 4.2pp fall in the combined audience share of the main five PSB channels in Northern Ireland. This reduction was lower than the decrease across the UK as a whole (4.9pp) but larger than in Scotland (3.2pp) and Wales (0.3pp).

All other UK regions except Border (+0.4ppt) and West (a steady +0.2pp) saw a reduction in the total share of the main five PSB channels between 2010 and 2015.

**Figure 2.8 Reduction in combined share of the main five PSB channels, all homes: 2010 and 2015**



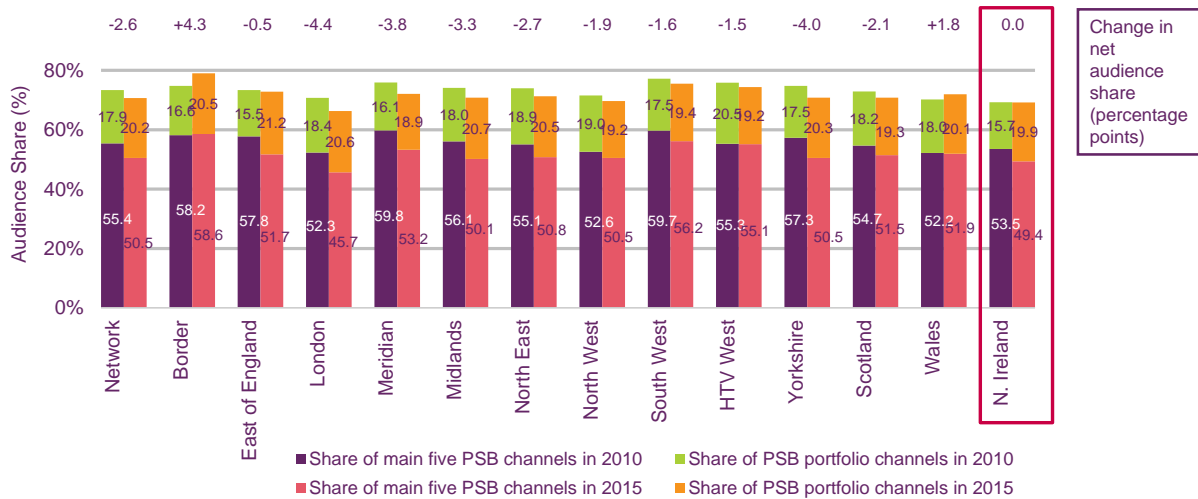
Source: BARB, Individuals (4+).



**The total share of the main five PSBs and their families of channels remained stable between 2010 and 2015 in Northern Ireland**

While the main five PSB channels' share of viewing decreased by 4.2pp, the PSB portfolio channels increased their share of viewing in Northern Ireland by 4.2pp between 2010 and 2015. This resulted in the overall net share of the main PSBs and their families of channels remaining stable. Only Border and Wales had a higher change in audience share.

**Figure 2.9 Net change in the audience share of the main five PSB channels and their families of channels, all homes: 2010 and 2015**



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

**Regional news and HD channels**

**Channel 3/ITV**

ITV does not currently broadcast regional HD variants for all of its regions. This means that in some areas, an out-of-region HD version is shown on the ITV HD channel. London, Meridian, Wales, Central, Granada, Anglia\*, Yorkshire\*, Tyne Tees\* and STV currently offer the HD service, so in the remaining areas, the local news shown on the HD variant is not the local news for that region (e.g in Border, the Granada news feed is shown). The chart below includes all viewing to any early evening news programming, even if it is not the relevant local one to the area. The ITV early evening news bulletin share analysis in the 2014 CMR excluded the ITV HD variants and looked just at the SD share. Note: ITV HD is not reported against the ITV Ulster panel.

**BBC One**

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

The reporting of BBC One remains unchanged from the CMR 2014.

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

## UTV's early evening local news bulletin attracted a greater share in Northern Ireland than the UK average for the same weekday time period

UTV's early-evening news bulletin, *UTV Live*, attracted a 35.3% average share in Northern Ireland between 6pm and 6.30pm, nearly double Channel 3's UK average for early-evening news bulletins (18.5%). This was markedly higher than in all other UK nations and regions, with the exception of Border, which achieved a 41.9% viewing share. BBC One's counterpart bulletin in Northern Ireland, *BBC Newslines*, attracted a lower average share (29.4%) between 6.30pm and 7pm. This is in line with the BBC early evening news bulletin across the UK as a whole (29.6%).

**Figure 2.10 BBC One and ITV/ STV/ UTV/ ITV Wales early evening news bulletin shares, all homes: 2015**



Source: BARB, Individuals (4+). Channels include HD variants where applicable but exclude +1s (for Channel 3). Early evening ('local') news bulletin figures based on 'regional news' genre programmes, start time range 17:55-18:35, 10mins+ duration, weekdays. UK figures are based on share to respective early evening news bulletin slot times. BBC One's early evening news bulletin is transmitted between 18:30-19:00 and ITV/STV/UTV/ITV Wales' is transmitted between 18:00-18:30.

## The proportion of adults in Northern Ireland who use TV as their main source of UK and world news is in line with the UK overall

Television was the main source of UK and world news for adults in Northern Ireland, with 62% claiming to use it, in line with the UK. Radio was the second most popular source for news, at 17% of adults; this was significantly higher than for the UK overall (10%). Both websites or apps<sup>4</sup>, and newspapers, were cited as main sources of UK and world news by a significantly lower proportion than in the UK overall (at 9% and 4% respectively).

<sup>4</sup> These include websites or apps accessed using a computer, laptop, netbook or tablet and using a mobile phone.

**Figure 2.11 Respondents' main media source for UK and world news, by nation:**



Source: Ofcom Media Tracker 2015.

Base: All (2,107); England (1,607); Scotland (180); Wales (164); Northern Ireland (156). Prompted, single code. Responses ≥ 3% labelled. Significance testing shows any difference in the main source of news between any nation and all adults in 2015

## 2.4 TV programming for viewers in Northern Ireland

The following section outlines spend and hours of programming for viewers in Scotland, Wales, Northern Ireland, and the English regions, provided by the BBC and STV/ ITV/ UTV. The figures exclude Scots-Gaelic and Welsh-language programming but include some spend on Irish-language programming by the BBC. For information on Irish-language programming by the Irish Language Broadcast Fund (ILBF) see Section 2.5.

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

### Definitions

**First-run originations** - Programmes commissioned by, or for, a licensed public service channel with a view to their first showing on television in the United Kingdom in the reference year.

**First-run acquisitions** - A ready-made programme bought by a broadcaster from another rights holder and broadcast for the first time in the UK during the reference year.

**Repeats** – All programmes not meeting one of the two definitions above.

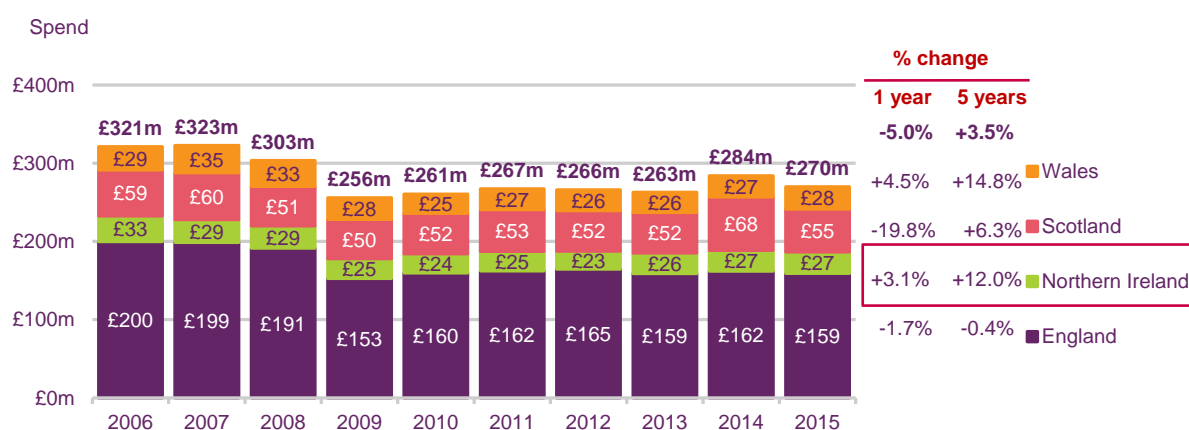
**Spend on output** - includes all costs incurred by the broadcaster on content; these usually include production costs for in house productions and licensing costs for commissioned and acquired programmes.

## BBC and UTV spend on first-run originated content for viewers in Northern Ireland increased slightly in 2015

£270m was spent by the BBC and ITV/ STV/ UTV on producing regional first-run originated programmes specifically for viewers in Wales, Scotland, Northern Ireland and the English regions in 2015, down by £14m in nominal terms year on year. The UK-wide decrease in spending can be accounted for in part by the exceptional nature of 2014, when spending increased in Scotland due to the Referendum on Scottish Independence and the Commonwealth Games held in Glasgow during July and August. However, since 2010, spend on first-run originated nations' and regions' output by the BBC and ITV/STV/UTV has risen by £9m.

In nominal terms, the year-on-year spend by the BBC and UTV on first-run originated programming for viewers in Northern Ireland increased by 3.1% to £27m in 2015. This was also a 12% increase on the £24m spend in 2010.

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



Source: Broadcasters. All figures are nominal.

Note: Spend data for first-run originations only. Excludes spend on BBC Alba and S4C output but includes some spend on Irish-language programming by the BBC. Spend on content broadcast in the Scottish part of the ITV Border region is included within England from 2006-2013, but in Scotland thereafter. These figures do not include spend on network content. For more information on S4C, please see Section 2.5.

## Total spend on current affairs programming for people in Northern Ireland has increased by 11% year on year

Including acquisitions and repeats, spend by the BBC and UTV on current affairs programming for viewers in Northern Ireland increased by 11% in nominal terms in 2015, and was 68% up on five years earlier.

Spend on news also increased, with a 4% year-on-year increase, and there was a modest increase of 1% on non-news/non-current affairs spend.

Total spend on programming commissioned for Northern Ireland increased by 3% in 2015. This is in contrast to the rest of the UK, which saw an average decrease of 5% in spend on programmes produced for specific nations and regions, led in particular by the decrease in spending in 2015 in Scotland following an exceptional 2014.

**Figure 2.13 Change in total spend on nations' and regions' output, by genre and nation: 2010-2015**

|                                     | UK           |         | England      |         | N. Ireland  |         | Scotland    |         | Wales       |         |
|-------------------------------------|--------------|---------|--------------|---------|-------------|---------|-------------|---------|-------------|---------|
|                                     | 1yr (%)      | 5yr (%) | 1yr (%)      | 5yr (%) | 1yr (%)     | 5yr (%) | 1yr (%)     | 5yr (%) | 1yr (%)     | 5yr (%) |
| <b>Current affairs</b>              | -10%         | -1%     | -1%          | -28%    | 11%         | 68%     | -19%        | 34%     | -7%         | 11%     |
| <b>News</b>                         | 0%           | 2%      | -1%          | -1%     | 4%          | 17%     | 1%          | 16%     | -3%         | 0%      |
| <b>Non-news/non-current affairs</b> | -14%         | 1%      | 0%           | -25%    | 1%          | -4%     | -28%        | -4%     | 14%         | 28%     |
| <b>Total spend in 2015</b>          | <b>£271m</b> |         | <b>£159m</b> |         | <b>£27m</b> |         | <b>£56m</b> |         | <b>£29m</b> |         |

|                        | UK  |     | England |     | N. Ireland |     | Scotland |     | Wales |     |
|------------------------|-----|-----|---------|-----|------------|-----|----------|-----|-------|-----|
|                        | 1yr | 5yr | 1yr     | 5yr | 1yr        | 5yr | 1yr      | 5yr | 1yr   | 5yr |
| <b>Change in spend</b> | -5% | 1%  | -2%     | -4% | 3%         | 12% | -20%     | 6%  | 5%    | 15% |

Source: Broadcasters. All figures are nominal.

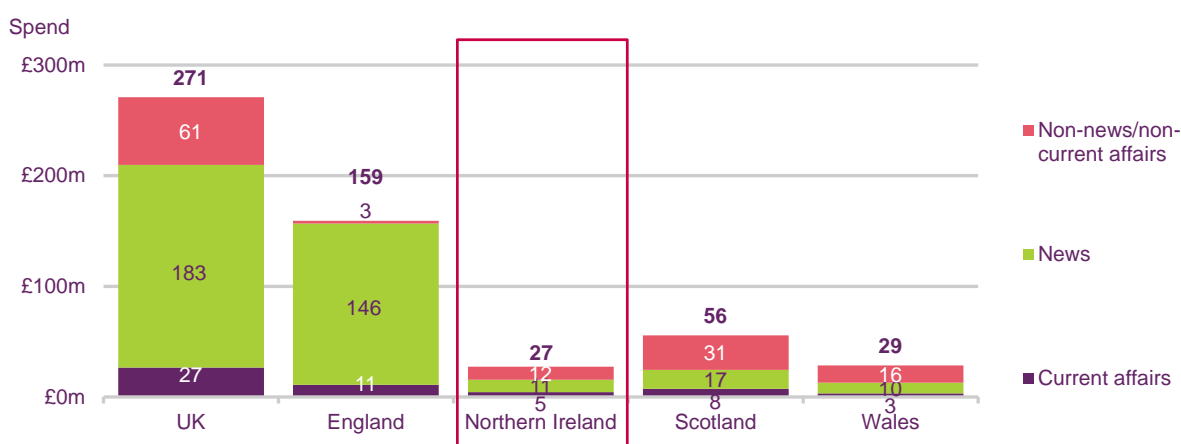
Note: Excludes spend on BBC Alba and S4C output but includes some spend on Irish-language programming by the BBC. These figures do not include spend on network content. Spend on programming for the ITV Border region is divided between England and Scotland in 2014-2015 and attributed to England only prior to 2014.

**Expenditure by the BBC and UTV on programming for viewers in Northern Ireland increased by 3% year on year**

Expenditure on nations' and regions' content broadcast by the BBC and UTV for people in Northern Ireland increased by £0.9m in 2015, a rise of 3%. In contrast, expenditure by the BBC and ITV/ STV/ UTV on programming across the UK fell by 5%.

In addition to this, the BBC incurred a further £28m of costs in delivering other content to S4C under the terms of the operating agreement, and contributed £5m to BBC Alba in Scotland.

**Figure 2.14 Total spend by the BBC/ ITV/ STV/ UTV on nations'/ regions' programming for the main PSB channels (BBC One and Channel 3): 2015**



Source: Broadcasters.

Note: Excludes spend on BBC Alba and S4C output but includes some spend on Irish-language programming by the BBC. These figures do not include spend on network content. Scotland figures include programming for viewers of ITV Border in Scotland. This was 73 hours of current affairs in 2015.

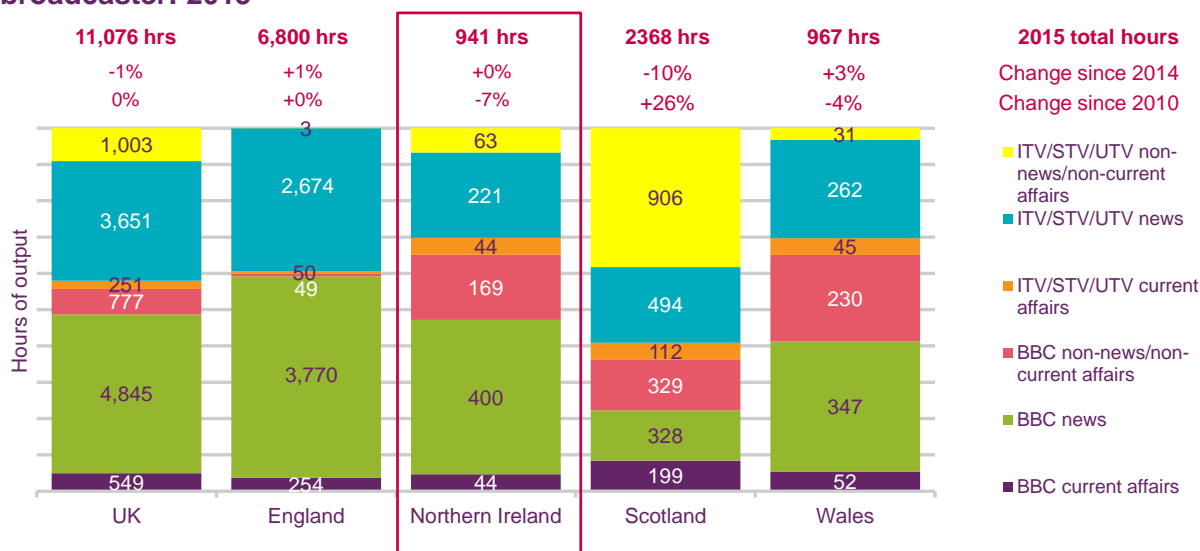
## The number of first-run originated hours for viewers in Northern Ireland remained stable in 2015

The BBC and ITV/ STV/ UTV produced a total of 11,076 hours of first-run originated content for the English regions, Scotland, Wales and Northern Ireland in 2015, down by 123 hours year on year.

The number of first-run originated hours produced specifically for viewers in Northern Ireland has decreased by 7% since 2010. Over the past year, the number of first-run hours has remained stable, compared to the UK-wide average which decreased by 1%.

The distribution of programmes across genres and broadcasters in Northern Ireland remained broadly the same as in 2014. The biggest changes were from UTV, with a 13 hour reduction in non-news/ non-current affairs programming, and a corresponding 13 hour increase in the number of current affairs hours broadcast in 2015.

**Figure 2.15 Hours of first-run originated nations'/ regions' output, by genre and broadcaster: 2015**



Source: Broadcasters.

Note: Hours data for first-run originations only. Excludes hours for BBC Alba and S4C output but includes some hours of Irish-language programming by the BBC. These figures do not include hours of network content. Scotland figures include programming for viewers of ITV Border in Scotland. This was 73 hours of current affairs in 2015.

## Total cost per hour of nations' output is up by 21% since 2010 in Northern Ireland in nominal terms

Analysing the cost of making programmes for the nations, cost-per-hour calculations show that Northern Ireland costs, when measured in nominal terms, increased over the five-year period to 2015 by 21%, in contrast to the UK average, which increased by 5%. This cost per hour increase could be attributed to the production of more expensive content for viewers in Northern Ireland over this period.

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



Source: Broadcasters. All figures are nominal.

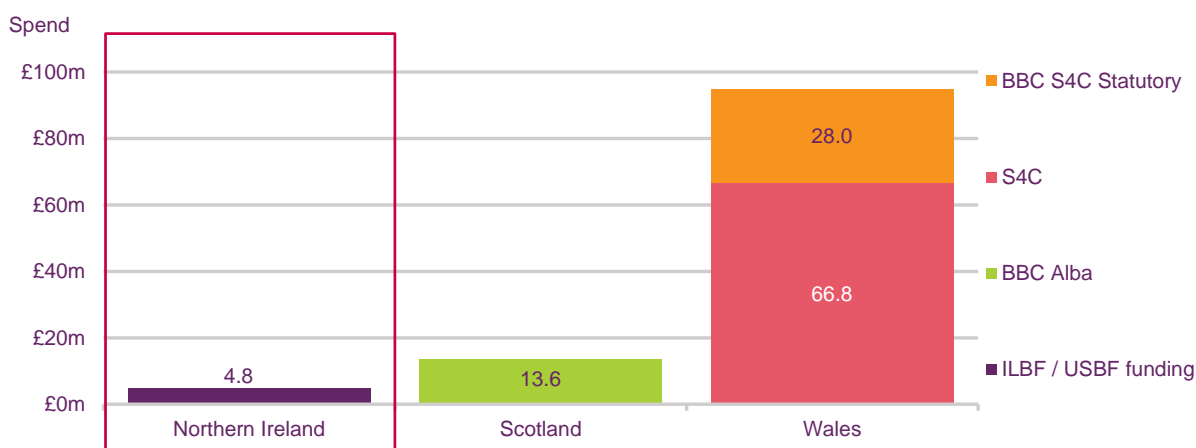
Note: Excludes spend on BBC Alba and S4C output but includes some spend on Irish-language programming by the BBC. These figures do not include spend on network content. Scotland figures include programming for viewers of ITV Border in Scotland. This was 73 hours of current affairs in 2015.

## 2.5 Other programming in Northern Ireland

**Together, the Irish Language Broadcast Fund (ILBF) and the Ulster Scots Broadcast Fund (USBF) contributed £4.8m to programmes broadcast in Northern Ireland in 2015**

On top of the BBC and UTV's contribution to local-interest programming, the ILBF contributed £3.4m and the USBF contributed £1.3m to the cost of Irish-language and Ulster-Scots cultural programming broadcast on BBC NI, UTV, TG4, and RTÉ.

**Figure 2.17 Spend on other programming in the devolved nations: 2015**



Source: Broadcasters.

Note: BBC S4C Statutory refers to the cost to the BBC of programming supplied to S4C by the BBC as part of their statutory agreement. ILBF / USBF refers to additional production contributions by the Irish Language Broadcast Fund and the Ulster Scots Broadcast Fund. S4C figures cover the 2015/2016 financial year, BBC Alba and ILBF / USBF figures cover the 2015 calendar year.

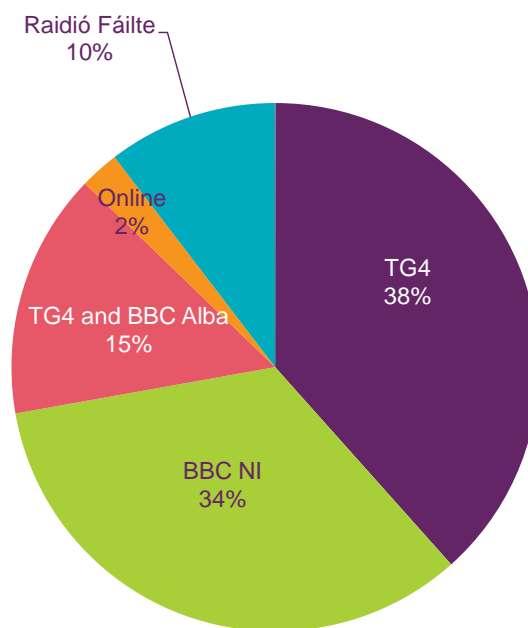
## The Irish Language Broadcast Fund

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

The first period of funding ran from 2005 to 2009. It was renewed in 2009, running until 2011, and again in 2013 for the period to 2015, with a further extension to 2016. A new four-year period of funding from 2016 to 2020 was announced in December 2015.

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

**Figure 2.18 ILBF content funding recipients, by broadcaster / platform: 2015/2016**

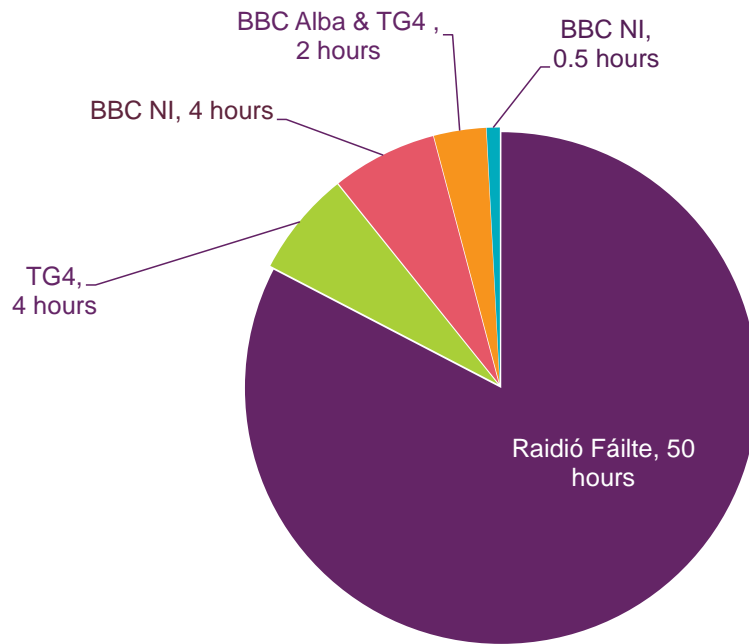


*Source: Northern Ireland Screen.*

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



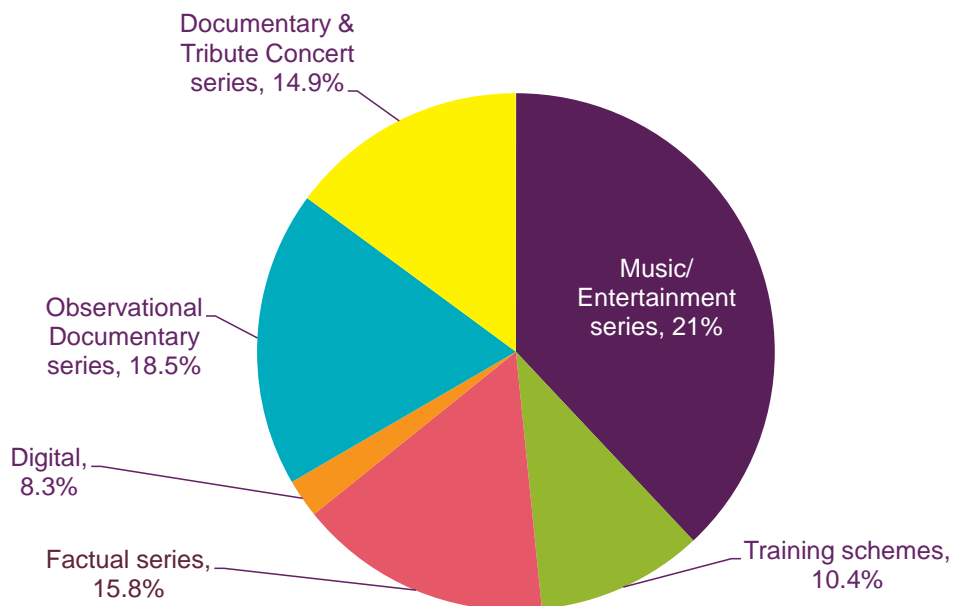
**Figure 2.19 ILBF-funded hours: 2015/2016**



Source: Northern Ireland Screen.

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

**Figure 2.20 ILBF content funding, by genre: 2015-2016**



Source: Northern Ireland Screen. Includes all programmes.

### **Programming highlights**

ILBF-funded travel series *Wwoofáil California* was nominated for a Torc at the Celtic Media Festival and for an IFTA (Irish Film and Television Academy Awards). *An Bronntanas* (The Gift) was also nominated for an IFTA.

Other 2015/2016 highlights include landmark documentaries: *Mary McAleese & an Chéad Eorpach*; *Enigma de Blaghad*; *Eoin Mac Néill, Fear Dearmadta 1916*; *Sheehy Skeffington, Síochánaí*; and entertainment series *I Lár an Aonaigh* and *Opry an Lúir*.

### **ILBF objectives for 2015-16 include:**

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

### **About the Ulster-Scots Broadcast Fund**

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

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

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

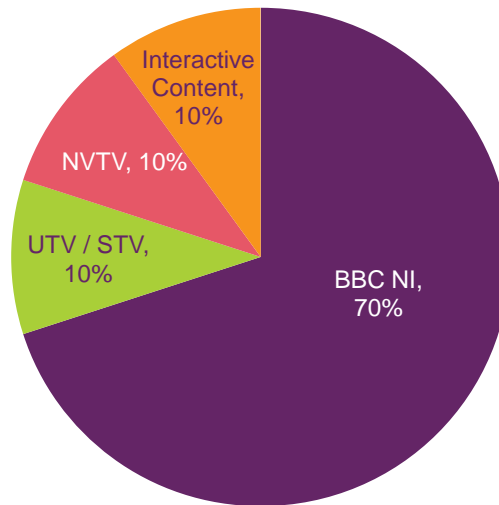
The UK Government has given a commitment to the fund (£1m per year) until at least 2020.

### **The majority of programming funded by the Ulster-Scots Broadcasting Fund was aired on BBC Northern Ireland in 2015/16**

In 2015-16 nine awards were made, totalling 23 hours of production, plus one award for interactive content.

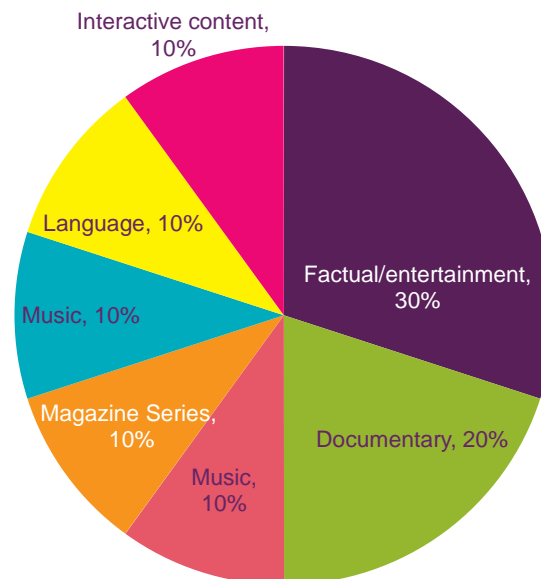
Five projects were broadcast in 2015/16 including documentaries, music and a cookery series. Funded content was broadcast on BBC Northern Ireland, UTV and STV.

**Figure 2.21 USBF content funding, by broadcaster: 2015-2016**



Source: Northern Ireland Screen .Includes all programmes.

**Figure 2.22 USBF breakdown of output, by genre: 2015-2016**



Source: Northern Ireland Screen. Includes all programmes.

**Programming highlights**

*Belfast to Congo: A Deadly Mission* told the story of Bob McAllister and his missionary family from Belfast, who in 1964 found themselves caught up in a bloody rebellion in the Central African Republic of Congo.

*Paul and Nick's Big American Food Trip* returned and was broadcast in Northern Ireland on UTV, in Scotland on STV and in the Republic of Ireland on UTV Ireland.

Three-part documentary travelogue series, *Brave New World: Canada*, explored the country's rich cultural connections with Ulster.

## Objectives for 2016/17 include:

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

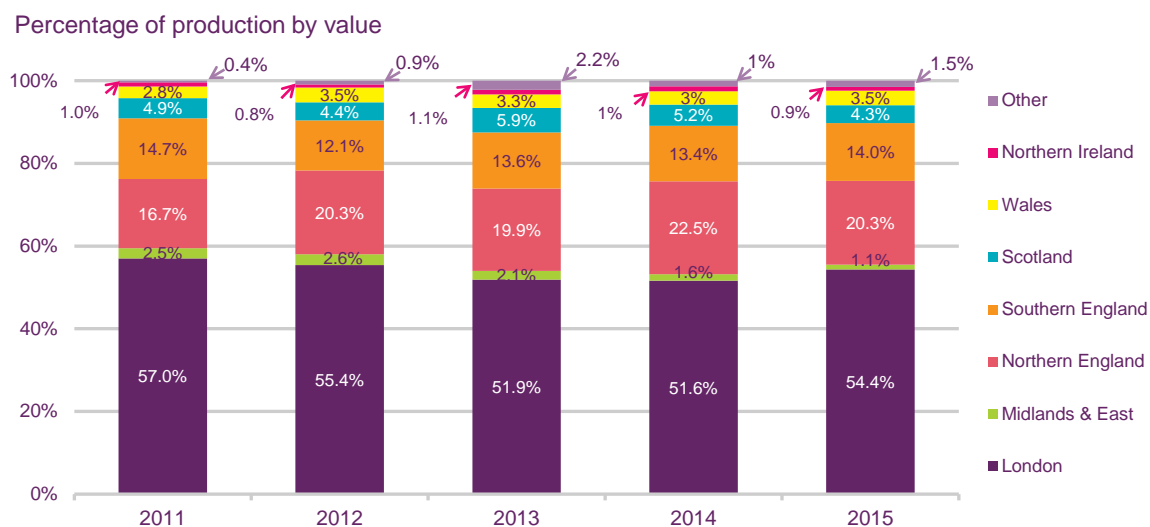
### Programming reach

During 2015-16, programming supported by the ILBF and USBF, and broadcast by BBC Northern Ireland, reached an audience of 690,000, representing just over 40% of the total Northern Ireland population<sup>5</sup>.

## 2.6 Network television productions made in Northern Ireland

Figure 2.24 and Figure 2.24 below illustrate the proportion of UK PSB network programmes that were produced in the nations and regions over the last five years, in terms of expenditure and volume respectively. In line with previous years, in 2015 0.9% of network broadcast hours were produced in Northern Ireland, measured by both expenditure and volume. This indicates that the average cost per hour was in line with the UK as a whole.

**Figure 2.23 Expenditure on originated network productions: 2011-2015**



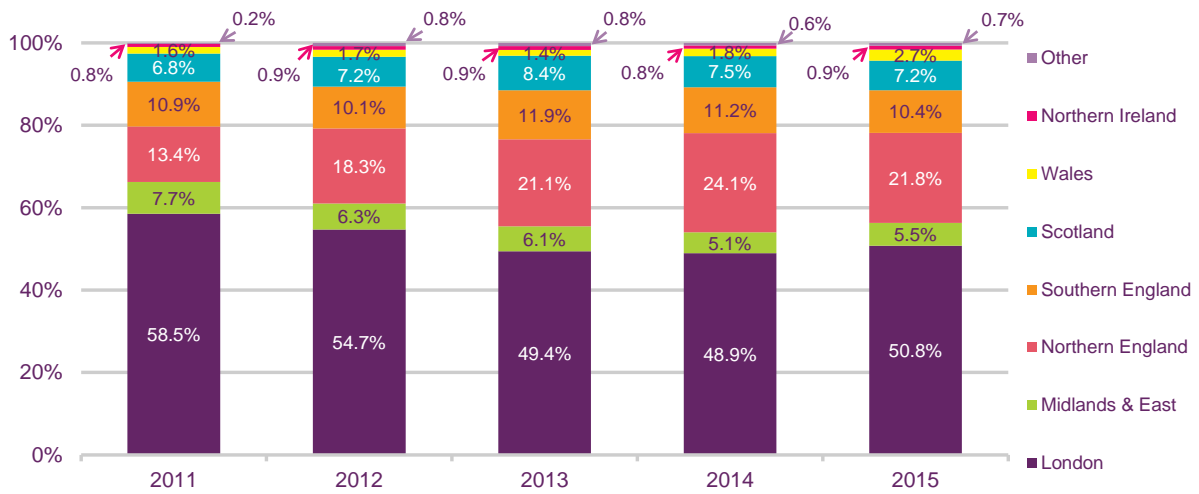
Source: Ofcom/broadcasters

Note: This expenditure does not include network news production. The category 'other' refers to programmes made by producers based within the M25 that qualify as regional productions on the grounds that 70% of total spend and 50% of off-screen talent spend was outside the M25 but not all in one macro-region, and therefore cannot be attributed to a single region. See [http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg\\_prod/](http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg_prod/) on Ofcom website for further details.

<sup>5</sup> Source BARB, all individuals in Northern Ireland (age 4+) Note: This is all programming that broadcast during 2015/2016, not allocation of funding.

**Figure 2.24 Volume of originated network productions: 2011-2015**

Percentage of production by volume



Source: Ofcom/broadcasters

Note: These hours do not include network news production. The category 'other' refers to programmes made by producers based within the M25 that qualify as regional productions on the grounds that 70% of total spend and 50% of off-screen talent spend was outside the M25 but not all in one macro-region, and therefore cannot be attributed to a single region. See [http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg\\_prod/](http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg_prod/) on Ofcom website for further details.