

Media nations: Northern Ireland 2021



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Overview

This *Media Nations: Northern Ireland* report reviews the main trends in the television and audio-visual sector as well as the audio industry in Northern Ireland.

The report provides updates on several datasets, including data collected directly from licensed television and radio broadcasters (for output, spend and revenue in 2020), as well as Ofcom's own consumer research and BARB data (for audience consumption).

Due to the Covid pandemic, some of the usual data sources – RAJAR (radio listening) and PSB Tracker (audience opinions) were not available this year.

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

Key points

TV services and devices

- Paid-for satellite and cable television services from Sky or Virgin Media were present in four in ten homes in Northern Ireland (40%) as of Q3 2020.
- More than half of households in Northern Ireland (57%) have at least one subscription video-on-demand (SVoD) service from companies such as Netflix, Amazon, Disney+ and Now TV.
- Netflix is still the largest, with more than half (52%) of households having a subscription, followed by Amazon Prime Video (27%) and Disney+ (8%).
- The BBC iPlayer is the most popular broadcast video-on-demand (BVoD) player in Northern Ireland; it was watched in six in ten Northern Ireland homes (61%) at the beginning of 2021. The ITV Hub (42%) was the next most popular BVoD player, followed by All4 (33%) and My5 (18%).

Broadcast TV viewing

- People in Northern Ireland spent an average of 4 hours 19 minutes per day watching something on the television screen in 2020, up by 36 minutes since 2019.
- In 2020, broadcast TV viewing in Northern Ireland bucked the long-term trend of decline and increased for the first time in a decade. This can largely be attributed to the pandemic.
- On average, people in Northern Ireland spent 3 hours 8 minutes every day watching broadcast television in 2020, 14 minutes more than in 2019.
- In the week commencing 23 March 2020, when the UK Prime Minister announced the first lockdown, average daily viewing of broadcast television peaked at 3 hours 42 minutes in Northern Ireland.
- Viewing declined as lockdown restrictions were eased, but began to increase again from August, climbing to a second peak in November and December, as restrictions were tightened and people in Northern Ireland spent most of the holiday period at home.
- Older people in Northern Ireland continue to watch more broadcast TV than younger viewers. Those aged 55+ watched 5 hours 39 minutes on average a day in 2020, up by 15% compared to 2019, while those aged 16-24 watched just 48 minutes of broadcast TV a day, down 23% compared to 2019.

Spend on programming for and from Northern Ireland

- There was a 30% decrease in spending on first-run content for viewers in Northern Ireland in 2020, with spend on current affairs decreasing the most, at 43%. News accounts for the largest share of first-run spend (43%) in Northern Ireland.
- BBC hours of first-run content in Northern Ireland dropped by 6% in 2020 to 568 hours. Overall, news content makes up the largest amount of the BBC's output for Northern Ireland, comprising 51% of first-run hours.
- Some 1.6% of qualifying network spend on the PSB channels was on Northern Ireland-based productions in 2020.

Radio and audio

- More than eight in ten adults (84%) in Northern Ireland listen to the radio every week.
- More than half of all homes in Northern Ireland have a smart speaker (53%). The Amazon Echo is by far the most popular type (found in 67% of homes in Northern Ireland that have a smart speaker).
- The most popular reasons given by users in Northern Ireland for using smart speakers were to listen to music via a streaming service like Spotify, Apple Music or Deezer (65%), a live radio station (64%) or to get weather information (37%).
- It was a challenging year for the commercial radio sector, with revenues per head down 10% in 2020.

TV services and devices

Introduction

Long-established television platforms such as Freeview, which is available through digital terrestrial television (DTT), satellite – either from Sky or Freesat – and cable (Virgin Media) are still the main channels for delivering entertainment services to people’s homes.

These platforms rely on a variety of types of infrastructure to deliver their services. Freeview uses a network of transmitters across Northern Ireland to deliver television services into people’s homes through a rooftop aerial and is widely, although not universally, available across Northern Ireland. Satellite is universally available,¹ while cable coverage is available mainly in built-up urban areas.

However, the main trend in recent years has been the rapid rise of new subscription video-on-demand (SVoD) services such as Netflix, Amazon Prime Video and Disney+, and this continued throughout 2020.

Although these SVoD services are mainly taken in addition to content on other TV platforms, they are having a hugely disruptive effect on the television sector, gaining new customers and affecting how and where people are watching TV-like content.

In response, traditional public service broadcasters are adapting how they deliver content to viewers. Alongside their linear TV services, the BBC, ITV, Channel 4 and Channel 5 all have their own broadcaster video-on-demand (BVoD) services. These SVoD and BVoD services are delivered over the internet through connected TVs as well as mobile phones, tablets and PCs.

Traditional TV platforms

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

Just over half of homes have a free TV service only – either Freeview or Freesat. Televisions are an established fixture in our homes, with more than nine in ten households in Northern Ireland (96%) having a TV set in 2020.² But the way we access services on our televisions 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 40% of homes in Northern Ireland in 2020. Paid-for satellite accounts for most of these (31%), with Virgin Media’s cable service present in just 9% of households in Q3 2020, down from 11% in Q1.

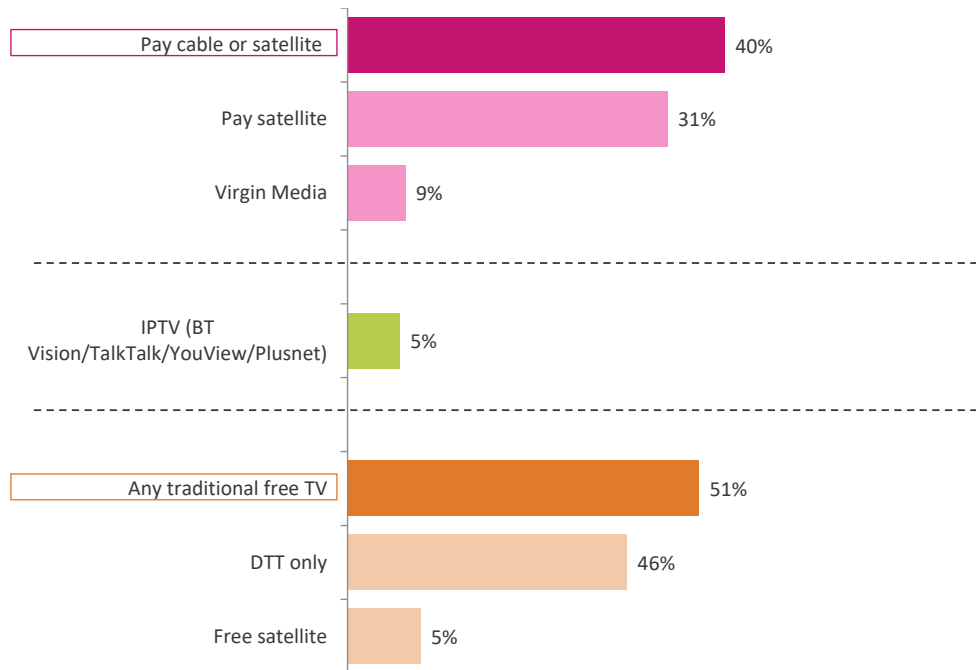
DTT services *only* (delivered through an aerial) account for most free TV viewing (46%), with free satellite present in just 5% of homes, largely through Freesat. Fifty-one per cent of Northern Ireland households had only DTT or free satellite in 2020.

¹ Based on the availability of a line-of-sight path to the satellite

² BARB Establishment Survey Q3 2020

Only a small proportion of homes in Northern Ireland (5%) had 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.

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



Source: BARB Establishment Survey Q3 2020

Subscription video-on-demand

As in other parts of the UK, take-up of subscription video-on-demand (SVoD) services from providers like Netflix, Amazon Prime Video and Disney+, delivered over the internet, continues to gather pace among households in Northern Ireland.

Nine in ten (89%) of households in Northern Ireland had an internet connection at the beginning of 2021 (84% had fixed broadband).³

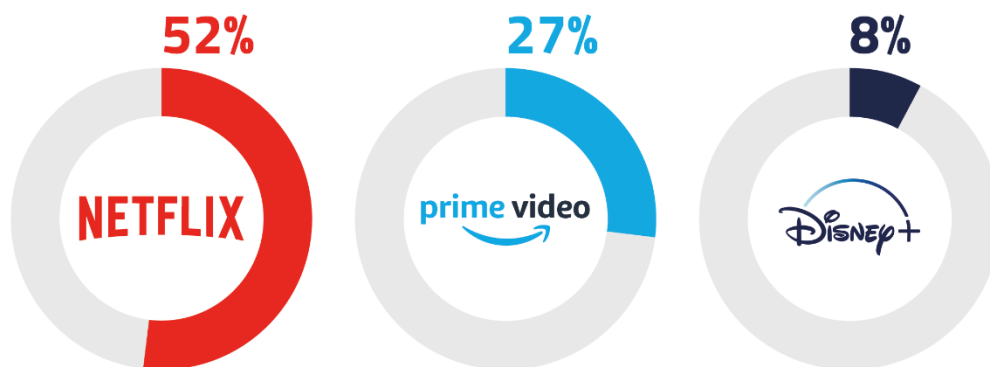
A combination of factors made 2020 a landmark year for subscription video-on-demand (SVoD), both in the UK and internationally; total global SVoD subscriptions increased by an estimated 300 million, passing the one billion threshold to reach 1.18 billion.

Disney+ has become the third most popular subscription video-on-demand service in Northern Ireland

In Northern Ireland, SVoD services saw an uplift in 2020, with 57% of households subscribing to at least one of them. Netflix is still the largest; more than half (52%) of households have a subscription, followed by Amazon Prime Video (27%) and Disney+ (8%).

³ Ofcom Technology Tracker Q1 2021

Figure 2: Use of SVoD services in Northern Ireland (% of households)



Source: BARB Establishment Survey Q3 2020

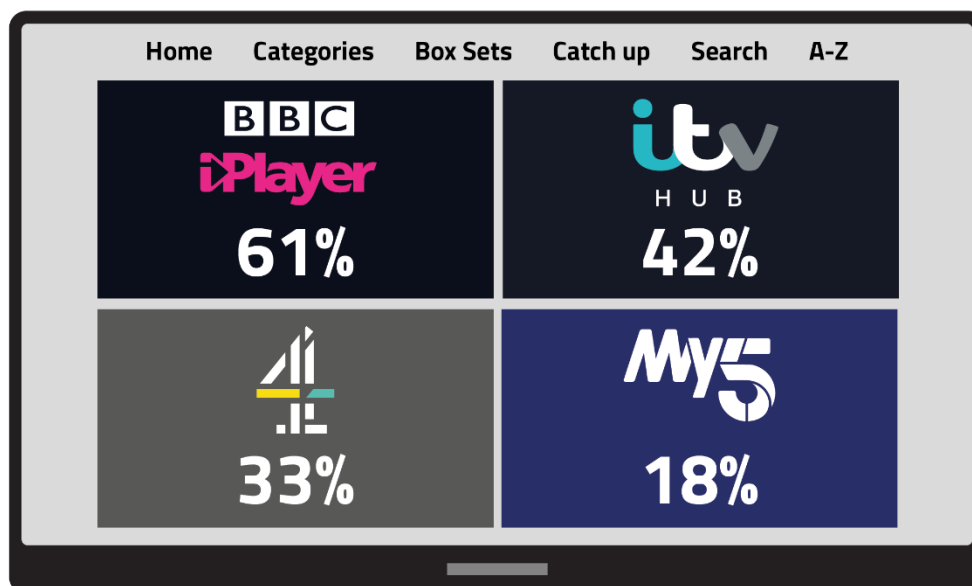
Broadcaster video-on-demand

BBC iPlayer is the most popular PSB service among viewers in Northern Ireland

The broadcaster video-on-demand (BVoD) players from the BBC, ITV, Channel 4 and Channel 5 are also proving popular with viewers. The most popular, the BBC iPlayer, was watched by six in ten of Northern Ireland homes (61%) at the beginning of 2021. The ITV Hub (42%) was the next most popular BVoD player, followed by All4 (33%) and My5 (18%).⁴

⁴ Ofcom Technology Tracker Q1 2021

Figure 3: Use of main broadcaster video-on-demand (BVOD) services in Northern Ireland (households)



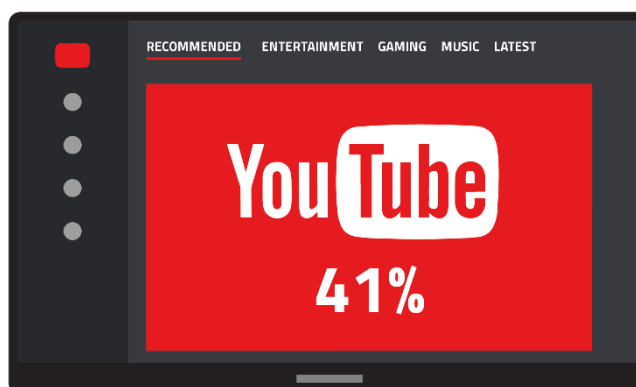
Source: Ofcom Technology Tracker 2021

Four in ten homes in Northern Ireland use YouTube

Research carried out for Ofcom’s Online Nation 2021 report⁵ showed that in 2020 UK adult internet users spent an average of 3 hours 37 minutes a day online on computers, tablets and smartphones; 9 minutes more than in 2019.⁶ Most of this growth was due to time spent using connected TVs – whether for video-on-demand viewing, online gaming or watching YouTube or TikTok.

Ofcom’s estimates suggest that UK individuals, including children, spent 81 minutes per day on average watching these services on the TV set in 2020.

Just over four in ten (41%) of households in Northern Ireland reported that they used YouTube to watch programmes, shows or films, at the beginning of 2021.⁷ This figure could therefore exclude other types of content such as short clips.



⁵ https://www.ofcom.org.uk/_data/assets/pdf_file/0013/220414/online-nation-2021-report.pdf

⁶ Comscore MMX Multi-Platform, Total Internet, Age 18+, monthly average 2019 and 2020, UK

⁷ Ofcom Technology Tracker Q1 2021

TV viewing trends

The pandemic led to increases in all forms of TV viewing in Northern Ireland

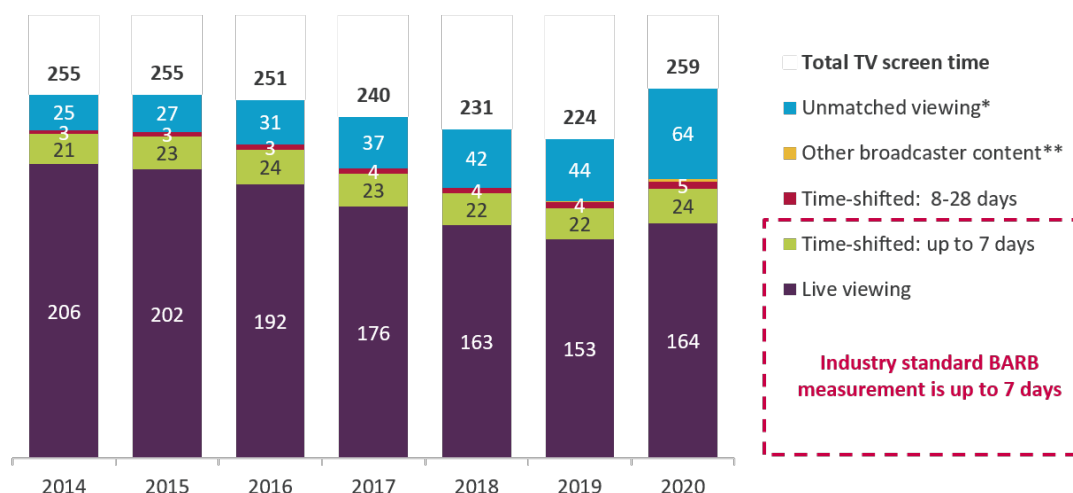
Government lockdown restrictions in response to Covid-19 affected all aspects of the broadcasting sector in Northern Ireland in 2020. As the public stayed at home, they turned to their television to keep them entertained and updated with news about the pandemic.

Total viewing on the television screen in Northern Ireland was up by 36 minutes compared to 2019, at an average of 4 hours 19 minutes per day. The bulk of this time was still spent watching broadcast TV (3 hours 8 minutes), up by 14 minutes compared to 2019. This reversed a long-term trend of decline in broadcast TV viewing and can be attributed to the pandemic.

However, much of the rise in total viewing came from non-broadcast services on the TV set (classified as ‘unmatched’ by television measurement agency BARB, and including YouTube, gaming, and streaming services like Netflix and Amazon Prime Video), which increased by 46% since 2019 to 1 hour 4 minutes.

And yet, despite the increase in total broadcast TV viewing time during 2020, the proportion of people watching broadcast TV on average in a week (average weekly reach⁸) remained below 2019 levels for every month of 2020, with the exception of March (when it was 88.2%, up slightly from 87.9% in March 2019). The average weekly reach for all measured broadcast TV in Northern Ireland in 2020 was 84.2%, compared to 86.8% in 2019.

Figure 4: Average daily minutes of TV screen time, per person, in Northern Ireland



Source: BARB. BBC areas, all individuals (4+). Average minutes of viewing/day.

*Unmatched viewing = TV in use but content cannot be audio-matched or otherwise identified. Includes gaming, viewing DVDs, SVoD, YouTube, time-shifted viewing beyond 28 days, apps on smart TVs and navigation around EPG guides where there is no in-picture broadcast content. Audio-matched digital radio stations are excluded. **Other broadcaster content = content viewed on measured broadcasters’ BVoDs and

⁸ Reach criteria for all broadcast TV: 15+ consecutive minutes.

AVoDs that has not broadcast on linear television channels. For example, BVoD exclusives or historical box sets. Note: this was included within unmatched viewing in previous Ofcom reports.

Trends in TV viewing during the year largely mirrored Covid-19 restrictions

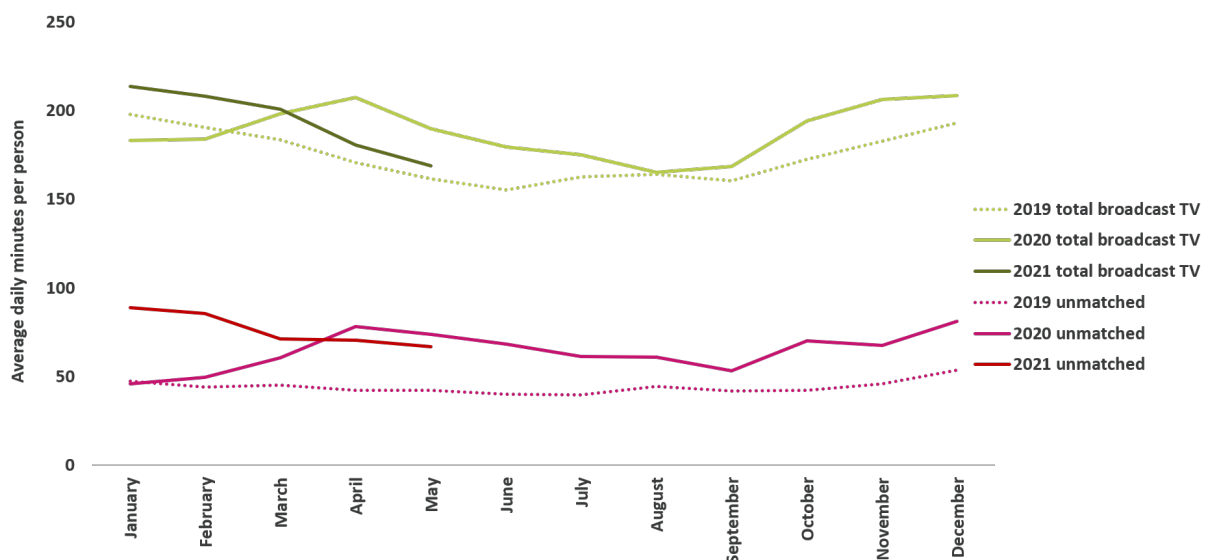
Viewing figures from the end of March 2020 onwards reflected the changing behaviour of viewers as the nation moved through the pandemic.

In the week commencing 23 March, when the UK Prime Minister announced the first lockdown, average daily viewing of broadcast television peaked at 3 hours 42 minutes in Northern Ireland.

Viewing remained relatively high throughout April (up by 22% on April 2019) but declined as lockdown restrictions eased and viewing of news programming reduced. It began to increase again from August, climbing to 3 hours 29 minutes in December, as restrictions were tightened and people in Northern Ireland spent most of the holiday period at home. Viewing peaked in January 2021, at 3 hours 33 minutes per day, and remained high throughout March as schools and colleges were moved to online learning and other strict restrictions were in place in Northern Ireland. As some of these were lifted, viewing decreased, falling below 2020 levels in April and May. Daily viewing remained above 2019 levels in these months.

Unmatched viewing retained much of the uplift it achieved in the first lockdown and remained consistently higher in 2020 than in 2019. This was largely due to the increased popularity of subscription services such as Disney+ and Netflix. Unmatched viewing peaked in January 2021, with people in Northern Ireland watching an average of 1 hour 29 minutes per day (up 94% on the previous January). Unmatched viewing remained higher than previous years in February and March, but like broadcast viewing, dropped below 2020 levels in April and May.

Figure 5: Total broadcast TV and unmatched viewing (daily mins per person) in Northern Ireland



Source: BARB 7-day consolidated viewing. All individuals (4+). BBC Ulster area

Where our data comes from

TV screen viewing data and analysis in this section uses data from the Broadcasters' Audience Research Board (BARB), a nationally representative panel of 5,300 homes across the UK providing the official broadcast TV measurement for the industry. This includes all viewing of broadcast TV through a television set, and via any device attached to the set such as a computer, streaming device or set-top box.

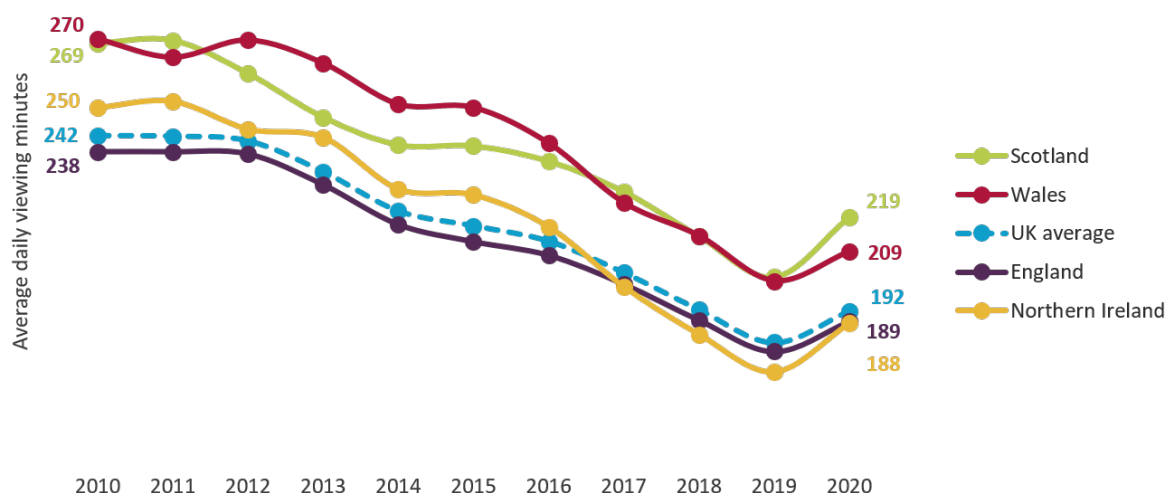
Unless otherwise stated, figures quoted are for seven-day consolidated viewing on a TV set. Consolidated viewing includes viewing of programmes at the time they were broadcast on TV (live viewing) as well as from recordings on digital video recorders (DVRs) and through catch-up player services (e.g. apps on smart TVs) up to seven days after the first broadcast (time-shifted).

Data included in this section are for the calendar year 2020, and therefore reflect the different viewing patterns that resulted as people in the UK dealt with the Covid-19 pandemic and associated government restrictions.

Although average viewing increased, Northern Ireland watched the least broadcast TV of any UK nation in 2020

At 3 hours 8 minutes, viewing of broadcast TV on the TV set per day in 2020 was 14 minutes (8%) higher than in 2019 and the first yearly increase in Northern Ireland for a decade. But as mentioned above, this was a consequence of people staying at home more, and watching more news, during the pandemic.

Figure 6: Average daily minutes viewed per person, by nation: 2011-2020



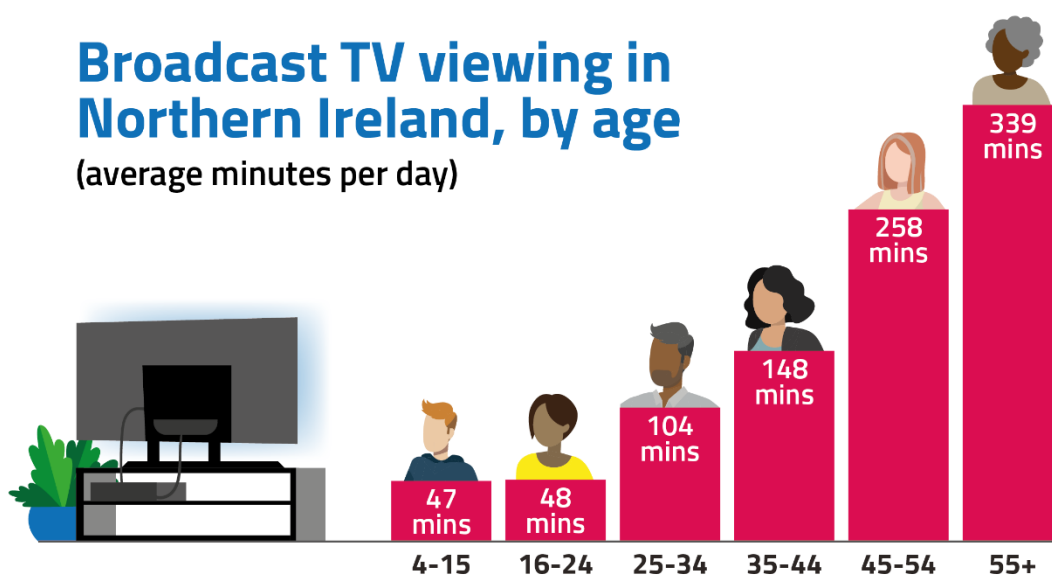
Source: BARB. BBC areas, all individuals (4+).

Older viewers drove the increase in broadcast TV viewing in Northern Ireland – but unmatched viewing increased among all age groups

As in the rest of the UK, older people in Northern Ireland continue to watch more broadcast TV than younger viewers. Those aged 55+ watched 5 hours 39 minutes on average per day in 2020, up by 15% compared to 2019. Viewing also increased among 45-54 year-olds, up by 10% compared to 2019. Those aged 35-44 increased their average viewing by 2%.

In contrast, broadcast viewing among young people declined. For 16-24 year-olds the decline was steepest; down by 14 minutes since 2019 (23%). Children’s broadcast viewing (aged 4-15) also declined significantly, falling by 15% to 47 minutes.

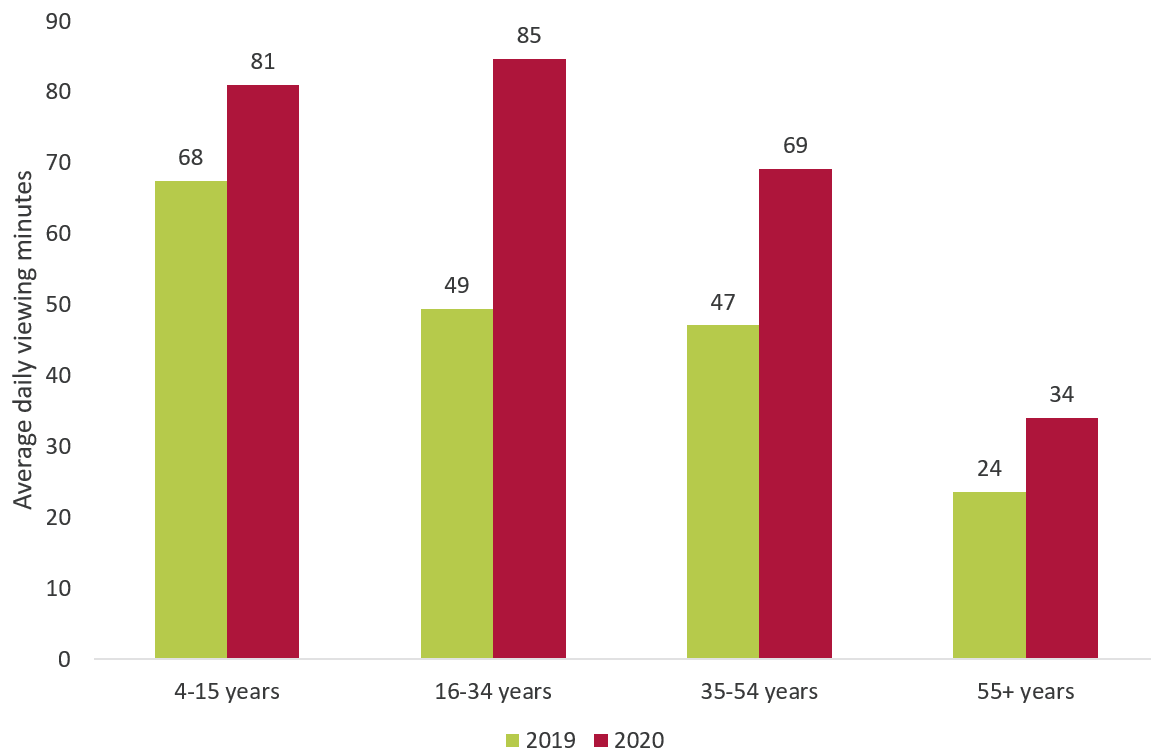
Figure 7: Average daily minutes viewed, by age group



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

Younger people in Northern Ireland watched more non-broadcast TV on the TV set than older viewers, although viewing of this increased among all age groups in 2020. The 16-34s watched more than any other age group, at 1 hour 25 minutes per day, up by 73% since 2019. Over-54s watched the least, at 34 minutes per day, although viewing also increased significantly among this age group, up by 42% compared to 2019.

Figure 8: Average daily minutes of unmatched viewing time per person in Northern Ireland, by age



Source: BARB. BBC Ulster area. Unmatched viewing = TV in use but content cannot be audio-matched or otherwise identified. Includes gaming, viewing DVDs, SVoD, YouTube, time-shifted viewing beyond 28 days, apps on smart TVs and navigation around EPG guides where there is no in-picture broadcast content. Audio-matched digital radio stations are excluded.

***I'm A Celebrity... Get Me Out of Here!* was the most-watched TV programme in 2020**

I'm a Celebrity... Get Me Out of Here! – filmed in Gwrych Castle in Wales due to the pandemic – was the most-watched programme of 2020. The opening episode of the show, airing on UTV, achieved an average audience of 492,000 (a 60% share of viewing).



The announcement of the lockdown on 23 March in a *BBC News Special* was the second-most-viewed TV programme, with an average audience of 398,000. *The Prime Ministerial Statement* of 10 May, in which the UK Prime Minister announced a provisional roadmap for the easing of restrictions, was also in the top five.

BBC One and UTV dominated the rankings, taking all but one of the top 20 spots – the exception was Channel 4's *Great British Bake Off*.

Figure 9: Top 20 most-watched programmes in Northern Ireland: 2020

Rank	Programme Title	Channel	Date	Average 000s	Share %
1	<i>I'm a Celebrity... Get Me Out of Here!</i>	UTV	15/11/2020	492	60.0
2	<i>BBC News Special</i>	BBC One	23/03/2020	398	43.8
3	<i>Ant and Dec's Saturday Night Takeaway</i>	UTV	21/03/2020	388	53.3
4	<i>Prime Ministerial Statement</i>	BBC One	10/05/2020	385	52.3
5	<i>Happy New Year Live!</i>	BBC One	31/12/2020	355	50.7
6	<i>An Address by Her Majesty The Queen</i>	BBC One	05/04/2020	347	40.1
7	<i>Britain's Got Talent</i>	UTV	11/04/2020	320	48.4
8	<i>BBC Newsline</i>	BBC One	26/03/2020	302	43.1
9	<i>Quiz</i>	UTV	15/04/2020	301	40.2
10	<i>UTV Live</i>	UTV	17/12/2020	297	49.0
11	<i>Emmerdale</i>	UTV	12/11/2020	284	42.7
12	<i>Strictly Come Dancing</i>	BBC One	19/12/2020	283	43.6
13	<i>Antiques Roadshow</i>	BBC One	05/04/2020	282	35.5
14	<i>The Great British Bake Off</i>	Channel 4	03/11/2020	282	36.9
15	<i>Des</i>	UTV	14/09/2020	275	38.2
16	<i>UTV Weather</i>	UTV	06/10/2020	275	47.0
17	<i>Coronation Street</i>	UTV	15/04/2020	271	43.2
18	<i>BBC News at Six</i>	BBC One	10/04/2020	266	54.2
19	<i>White House Farm</i>	UTV	08/01/2020	260	34.9
20	<i>Beat the Chasers</i>	UTV	29/04/2020	256	34.9

Source: BARB. BBC Ulster area, all individuals (4+)

What is public service broadcasting?

Public service broadcasting (PSB) is provided in Northern Ireland by the BBC, UTV (holder of the Channel 3 licence in Northern Ireland), Channel 4 and Channel 5. While all the BBC TV services are PSB, 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, predominantly 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.

The public service broadcasters account for just over half of broadcast viewing in Northern Ireland

In 2020, the main five PSB channels (BBC One, BBC Two, UTV, Channel 4 and Channel 5) accounted for a combined 53.1% share of total TV viewing in Northern Ireland. For context, there are more than 270 BARB-reported channels in the UK, available to view via digital terrestrial television, satellite, cable and other platforms.

The PSB share in Northern Ireland has increased since 2019, when the main five PSBs achieved a share of 51.4%. BBC One had the highest audience share of any individual PSB channel, at 20.9%.

Figure 10: Percentage share of the total TV viewing in the nations for the five main PSB channels: 2020

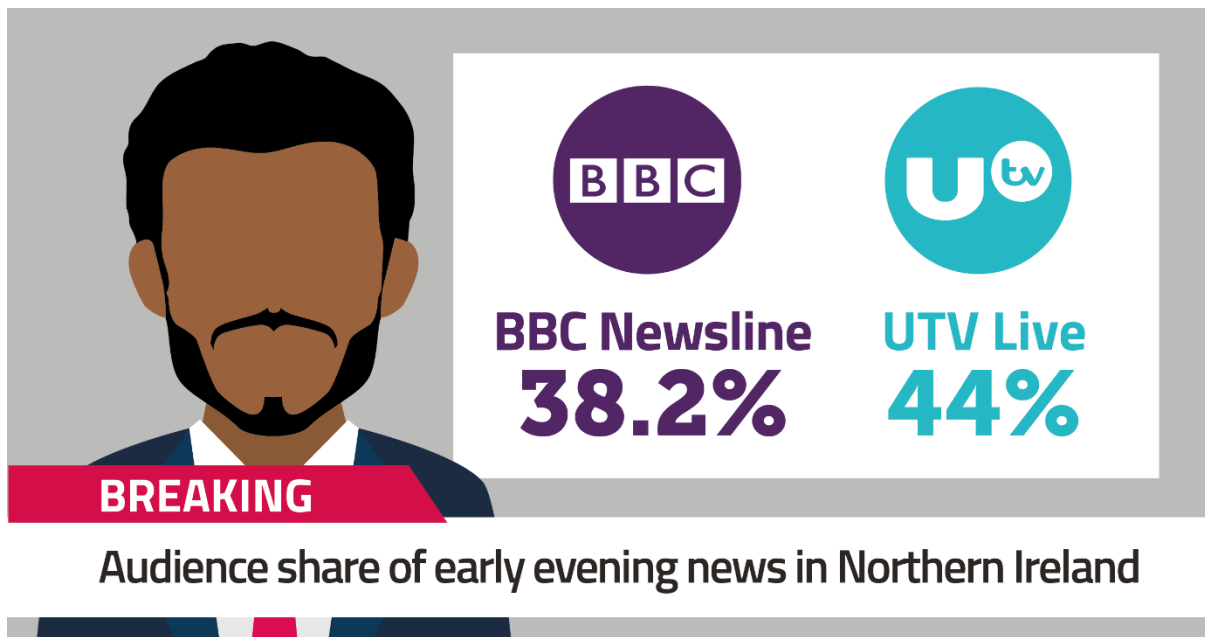


Source: BARB. BBC areas, all individuals (4+). Excludes any +1 channels.

The pandemic led to a surge in news viewing

News viewing across the UK increased in 2020 as the public sought information on the unfolding pandemic and changing government restrictions. In Northern Ireland, the average audience share of BBC One's early evening *Newsline* programme was 38.2%, up from 31.7% in 2019. The average audience share of viewing of the *UTV Live* news programme was higher still, at 44%, up from 39.3% in 2019.

Figure 11: Audience share % of BBC One and UTV early evening news: 2020



Source: BARB. All individuals (4+). Note: Early evening ('local') news bulletin figures run by programme title, weekdays and include the +1 channel where applicable. BBC One's early evening news bulletin, BBC Newsline, is transmitted between 18:30-19:00 and based on BBC areas. UTV Live is transmitted between 18:00-18:30 and is based on ITV areas.

ITV's networked early evening news is more popular in Northern Ireland than its BBC counterpart

The average audience share of the UK-wide *BBC News at Six* in Northern Ireland was 25.1%, lower than in any other UK nation. However, the average audience share of the *ITV Evening News* in Northern Ireland was 27.4% in 2020 – the highest of any UK nation.

Ofcom calls for stronger system of public service media fit for the digital age

Ofcom is [recommending a radical overhaul of laws](#) to ensure that public service media survives and thrives in the digital age.

Our recommendations to the Government mark the conclusion of [Small Screen: Big Debate](#) – an in-depth review on the future of public service media (PSM). The report calls for the renewal of the PSM system to ensure it can flourish for the next decade and beyond.

During the course of the review, we spoke to audiences of all ages and backgrounds right across the UK, and met broadcasters, streaming services, academics and analysts at home and abroad. Our consultation received over 100 responses, with consensus on two fundamental issues – the importance of PSM for UK viewers, and the urgent need to update the system to ensure its future sustainability.

Public service content matters to people and society... but it's under increasing threat

Our review makes clear that public service programming remains highly valued by UK audiences, and the pandemic has only served to reinforce its role in society.

Our research findings emphasise the special importance viewers place on high-quality, trusted and accurate news. It reveals a passion for soaps, drama and live sports, which bring us together, as well as programmes which reflect the diversity of the UK's nations and regions. Public service media is also central to the UK creative economy, with about £3bn spent each year on new commissions across a broad range of genres.

But with global competition intensifying, viewers are no longer bound by television schedules and can pick and choose content from a range of online providers and platforms. Given these changes, the UK's broadcasting industry is facing its greatest challenge.

A step-change in broadcasters' digital plans – and an overhaul of legislation

To secure the future of PSM, broadcasters must accelerate their digital plans if they are to maintain a strong link with audiences, and the regulatory system also needs to be urgently updated.

So, we are recommending that the Government brings forward primary legislation to:

- **Modernise the PSM objectives.** New legislation should secure and strengthen PSM's most important features: a broad range of programming that reflects all parts of the UK, and the ability to engage the widest possible audiences. There should also be a new objective to support the UK's creative economy.
- **Update availability and prominence rules to include digital platforms.** Broadcasters and connected-TV platforms are struggling to reach commercial agreements, making it harder for audiences to find PSM content on digital platforms than on traditional TV. So new rules are needed to require PSM providers to offer their on-demand services to popular TV platforms. In turn, platforms should be required to include and give appropriate prominence to PSM content. Ofcom should be given monitoring and enforcement powers, including the ability to resolve commercial disputes.

- **Update production rules for PSM content.** If PSM providers are to reach all audiences, they need to be able to commission content which they can deliver flexibly - both online and on broadcast TV. So, we recommend that commissioning rules designed to support independent productions should apply to all PSM content, regardless of whether it is commissioned for broadcast TV or online. This would include programmes exclusively shown on online services.
- **Update the rules for PSM providers.** Broadcast licences need modernising to cover content produced across broadcast TV and online. PSM providers should be given the flexibility to innovate and respond to technological and market changes. Quotas should remain to secure important PSM programming, like news, and to safeguard the quality of traditional broadcast TV for those audiences who continue to rely on them. PSM providers should be required to set out clear plans to deliver against their objectives and report annually on their performance, with Ofcom holding them to account.

Transform and collaborate to compete

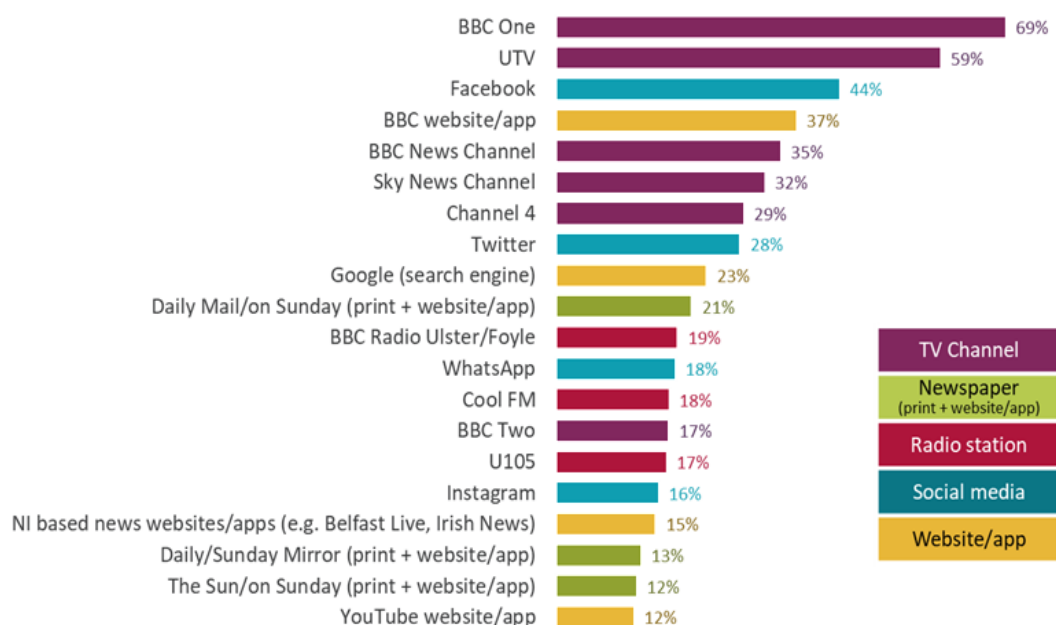
Legislative change to the existing framework alone is not likely to be enough to preserve the vital benefits of public service media; further radical approaches are required:

- **PSM providers must forge more ambitious strategic partnerships.** Deeper relationships between PSBs and other companies – particularly on platforms and distribution – could help them compete more effectively with global players and reach wider audiences. Channel 4 and Sky, for example, have recently expanded their existing partnership to cover content, technology and innovation.
- **Other companies should be encouraged to produce PSM programming.** The Government should consider how to encourage new providers to help deliver public service media in future. That could mean harnessing the broad range of high-quality, UK-based original news, drama and arts programming offered by existing commercial providers, such as Sky and Discovery. Or encouraging new providers of PSM or PSM-like content – for example, on social media platforms – to target audiences who don't connect with broadcasters on traditional TV platforms. Updated legislation should allow for complementary PSM providers to be added to the regulatory framework to maximise flexibility into the future.
- **Economic incentives to broaden PSM provision.** The Government should assess the case for financial support to add value for audiences in certain areas, such as regional programming. This could be done through a range of incentives such as contestable funding or tax relief.

TV is the most-used source of news for people in Northern Ireland

BBC One is the most popular source of news in Northern Ireland, followed by UTV and Facebook.

Figure 12: Top 20 sources of news in general in Northern Ireland: 2021



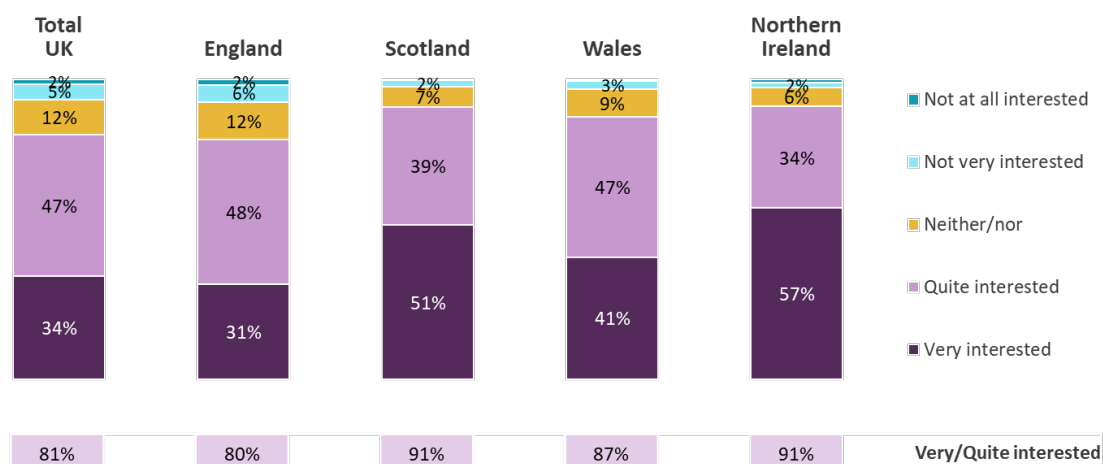
Source: Ofcom News Consumption Survey 2021 - ONLINE sample only. Base: All adults 16+ in Northern Ireland - 2021=250. *Note: data are not comparable to data in previous Nations reports, due to Covid-19 enforced methodological changes*

Nine in ten adults in Northern Ireland are interested in news about their own nation

There is a significant amount of interest in news about Northern Ireland by people who live there. Close to three in five adults who follow news claim to be ‘very interested’ in news about Northern Ireland (57%), rising to 91% who are ‘very’ or ‘quite’ interested.

As shown below, adults in Northern Ireland and Scotland are the most likely to say they are ‘very interested’ in news about their nation, whereas those in England and Wales are more likely to be ‘quite interested’.

Figure 13: Level of interest in news about own nation, by nation: 2021

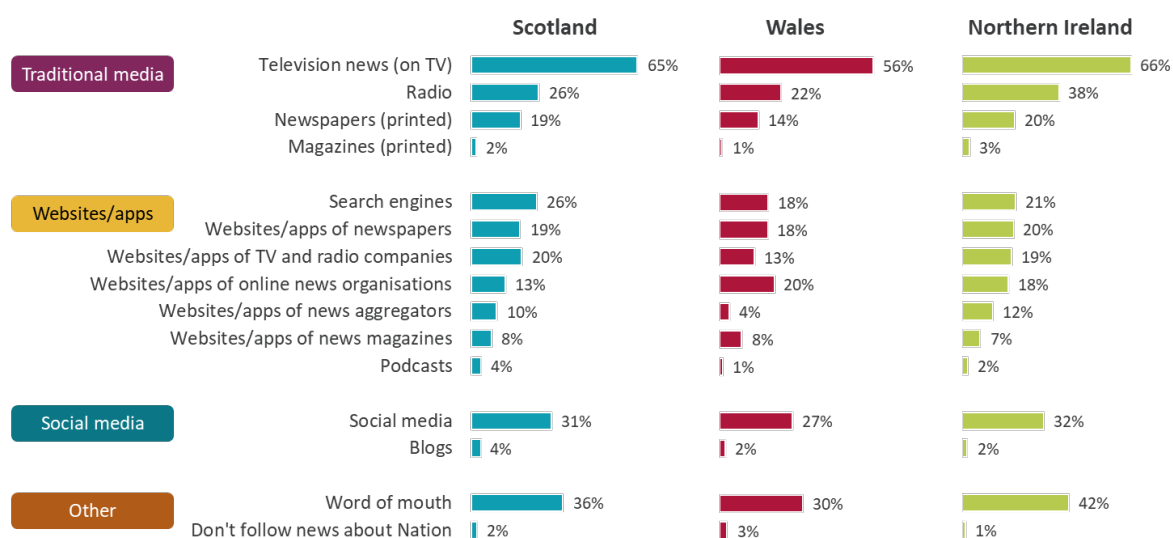


Source: Ofcom News Consumption Survey 2021 – combined CATI and online sample. Base: All adults 16+ who follow news in 2021 - Total=4499, England=3046, Scotland=518, Wales=466, Northern Ireland=469. Note: data is not comparable to data in previous nations reports, due to Covid-19-enforced methodological changes.

TV is the most popular way for people to access news about their own nation – but radio use is higher in Northern Ireland than in Scotland or Wales

While television was by far the most popular way for people in all UK nations to access news about their own nation, the use of radio varied across the nations. This was significantly higher in Northern Ireland, with 38% of adults using radio to get news about their nation.

Figure 14: Platforms used to access news about own nation, by nation: 2021



Source: Ofcom News Consumption Survey 2021 – combined CATI and online sample. Base: All adults 16+ who follow news – Scotland=518, Wales=466, N Ireland=469. Note: data is not comparable to data in previous nations reports, due to Covid-19 enforced methodological changes.

UTV and BBC One are the most-used sources of news about Northern Ireland

For news about their own nation, television is the most popular source among people in Northern Ireland. While UTV and BBC One are the most-used sources for news about the nation, 26% of adults said they used the BBC website/ app and 26% said they used Facebook for this – higher for both than in the other UK nations.

Figure 15: Sources used to access news about own nation: 2021

England		Scotland		Wales		Northern Ireland	
BBC One	33% ▼	STV	36%	BBC One	33%	UTV	50%
ITV	20% ▼	BBC One	26%	ITV WALES	25%	BBC One	45%
Facebook	15%	BBC website/app	22%	Facebook	18%	BBC website/app	26%
BBC website/app	13% ▲	Facebook	20%	BBC website/app	17%	Facebook	26%
		Twitter	15% ▲	Any Wales based news site/app	11%	BBC Radio Ulster/Foyle	14%
		BBC Scotland TV	12% ▼	BBC Radio Wales/Cymru	8%	Any NI based daily newspaper	13%
		Google (search engine)	11%	Twitter	8%	Cool FM	13%
		BBC Radio Scotland	9%			U105	12%
		Any Scotland based daily paper	8%			Any NI based news website/app	12%
						Twitter	10%
						BBC News Channel	9%
						The Belfast Telegraph	7%
						Google (search engine)	7%
Don't follow Nation news	6%	Don't follow Nation news	3%	Don't follow Nation news	3%	Don't follow Nation news	0%

Source: Ofcom News Consumption Survey 2021 – online sample only. Green/red triangles indicate statistically significant differences between 2021 and 2020 online samples. Base: All adults 16+ using TV/newspapers/radio/internet/magazine for news - England=2408, Scotland=290, Wales=242, Northern Ireland=243. Only sources with an incidence of >6% in each nation are shown. Note: data not comparable to data in previous nations reports, due to Covid-19 enforced methodological changes.

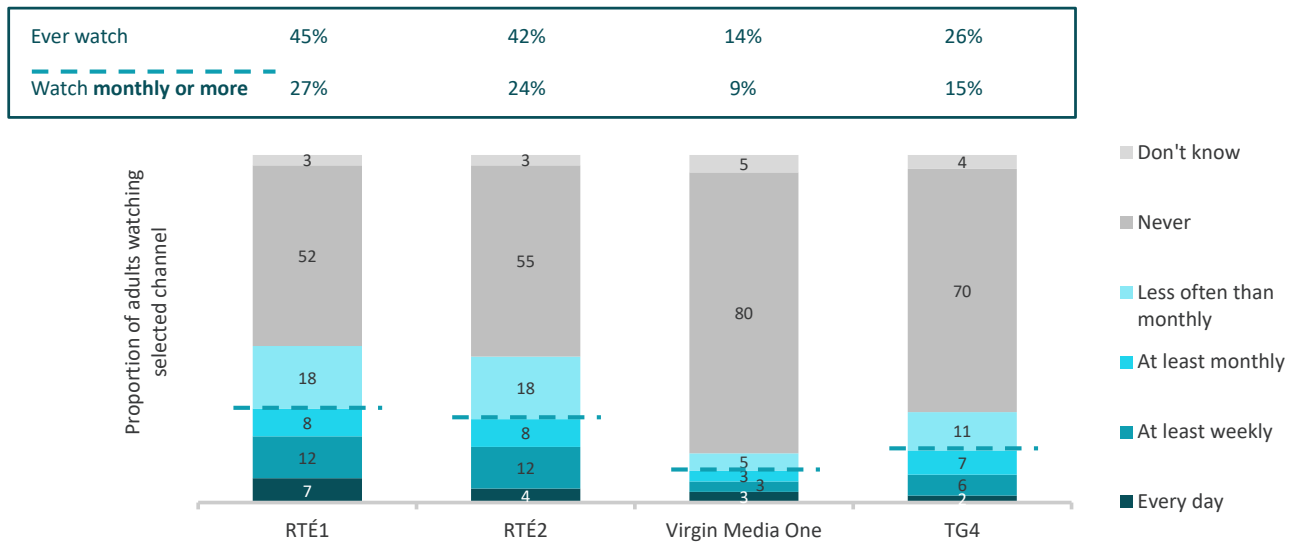
RTÉ channels are watched by about a quarter of adults in Northern Ireland every month

Republic of Ireland (RoI) TV services are available in most parts of Northern Ireland on several platforms. RTÉ One and Two, and Irish language channel TG4, are available through a rooftop aerial to more than 90% of households via digital terrestrial television, either via Freeview or Saorview (the Republic of Ireland's free-to-air DTT service). Viewers use one of these two platforms depending on where they live.

There is also 100% availability of RTÉ One / Two and TG4 on Sky and Virgin Media, and these channels are available via BT TV in areas where they are available on Saorview or Freeview.

About a quarter of adults in Northern Ireland (27%) with a TV in their home claim to watch RTÉ One at least monthly.

Figure 16: Claimed viewing of ROI-originated TV channels in Northern Ireland



Source: Ofcom Technology Tracker. How frequently, if at all, do you watch each of these channels? Base: All adults aged 16+ in Northern Ireland with a TV in household (n = 553) (excluding those completing a paper questionnaire)

TV programming for and from Northern Ireland

Introduction

The pandemic has had marked effects on content investment and production across the UK. Social distancing restrictions first stopped content production, and then increased costs once production resumed. This has had an impact both on broadcasters and on commissioners seeking to maintain content pipelines, and on producers ensuring productions can continue in a Covid-safe manner.

Unsurprisingly, growth in the production sector slowed in 2020, but overall the industry looks well-placed to recover. However, the pandemic is likely to exacerbate some already existing trends in the sector, such as inflationary production costs, revenue challenges for the UK's public service broadcasters, and consolidation in the independent production sector.

For production in the nations and regions, restrictions meant that some productions could not take place during lockdown measures, or were delayed. This impacted some of the broadcasters' regional production targets for 2020, such as the BBC's quotas on networked content made in Northern Ireland, and ITV's weekly hours of non-network programming on UTV. More information on broadcaster performance against these quotas can be found in Ofcom's PSB Annual Compliance Report.⁹

The BBC and UTV provide programming specifically for viewers in Northern Ireland across a range of genres, but most notably news output. There was an 30% decrease in spending on first-run content for viewers in Northern Ireland in 2020, with spend on current affairs decreasing the most, by 43%. News accounts for the largest share of first-run spend (43%) in Northern Ireland.

BBC hours of first-run content in Northern Ireland dropped by 6% in 2020 to 568 hours. Overall, news content makes up the largest proportion of the BBC's output for Northern Ireland, comprising 51% of first-run hours.

Northern Ireland is also an important source of production for PSB content shown across the UK. Some 1.6% of qualifying network spend on the PSB channels was on Northern Ireland-based productions in 2020.

⁹ <https://www.ofcom.org.uk/tv-radio-and-on-demand/information-for-industry/public-service-broadcasting>

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. All spend figures are in real terms, which mean they are adjusted for inflation using the consumer price index (CPI) and are listed in 2019 terms.

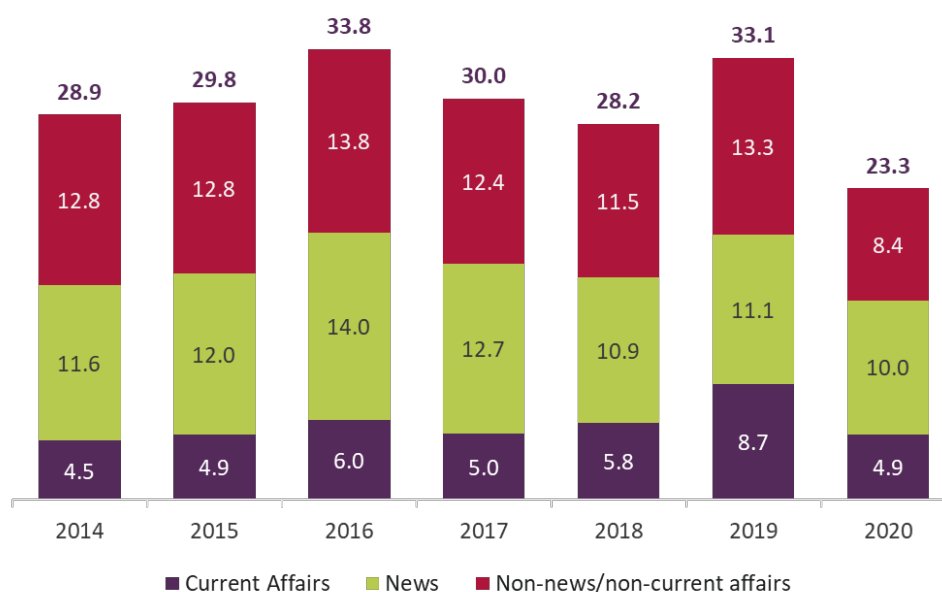
Spend on programming for Northern Ireland

PSB spend on first-run content for Northern Ireland fell across all genres in 2020

There was an 30% decrease in spending on first-run content for viewers in Northern Ireland in 2020. Of the total £23.3m spend, the majority went towards news, at £10.0m; a year-on-year fall of £1.1m.

Current affairs had the largest relative decline in first-run spend, decreasing by 43% year on year to £4.9m. PSB spend on news programming for Northern Ireland has fallen by only 10%.

Figure 17: PSB spend on first-run UK-originated content for Northern Ireland, by genre (£m)

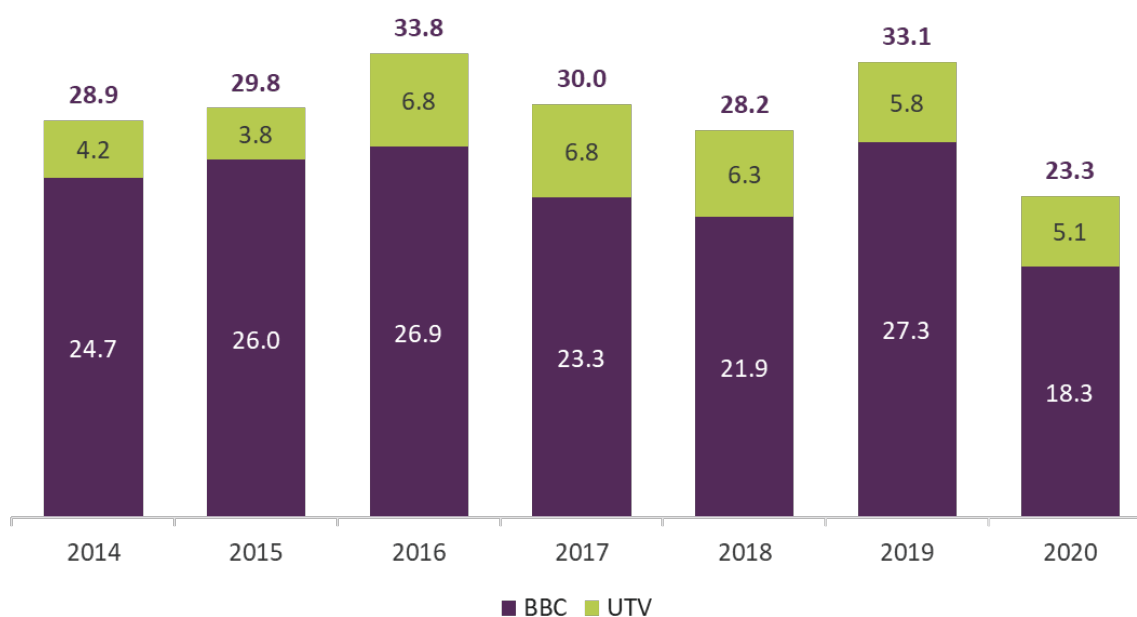


Source: Ofcom/broadcasters. Note: Figures are expressed in 2020 prices.

BBC and UTV spend on first-run content for Northern Ireland fell in 2020

The decrease in spend on first-run content is driven by the BBC, whose spend for Northern Ireland fell by 33% compared to 2019. In monetary terms, this is a decline of £9.0m to £18.3m. Spend by UTV on first-run content for Northern Ireland also decreased in 2020, down by 13%.

Figure 18: BBC and UTV spend on non-network first-run UK-originated content for Northern Ireland (£m)



Source: Ofcom/broadcasters. Note: Figures are expressed in 2020 prices

Local programming requirements

Both **UTV** and the **BBC** are required to produce programming for viewers in Northern Ireland.

Under the terms of its licence, which was renewed on 1 January 2015 for ten years, UTV has to deliver a minimum amount of programming which is 'of particular interest' to people living in Northern Ireland. This is done through quotas for news and non-news/current affairs programmes.

These quotas require UTV to produce at least four hours of news and two hours per week of non-news programming, of which at least 33 minutes must be current affairs.

The BBC, through its operating licence which came into effect on 1 January 2018, must also fulfil regulatory conditions specific to Northern Ireland.

Among other things, this operating licence stipulates that in each financial year the BBC must ensure that:

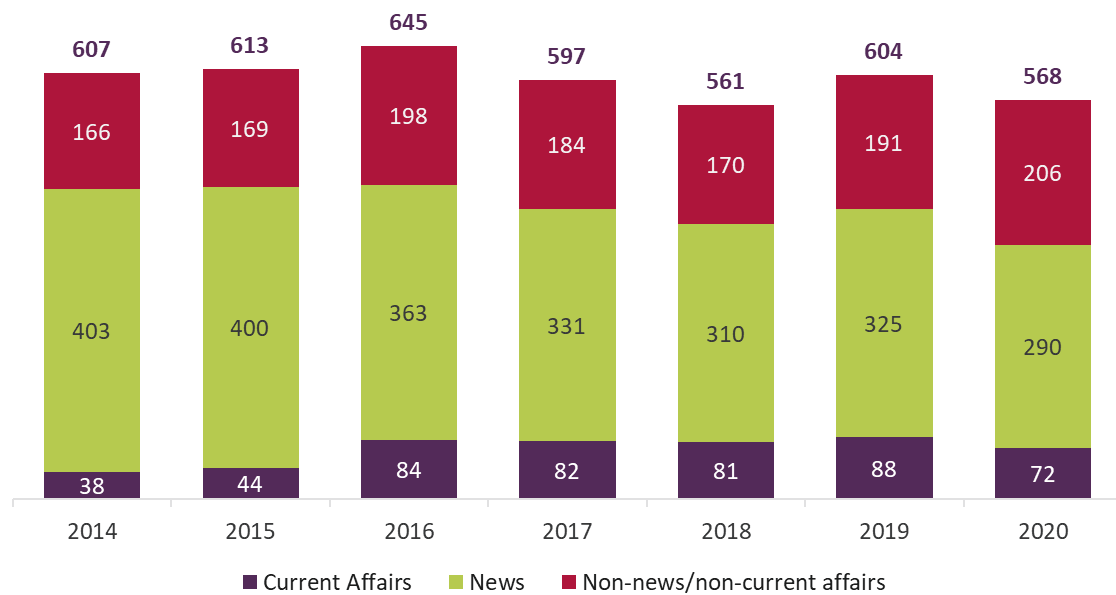
- in respect of BBC One Northern Ireland, at least 310 hours are allocated to news and current affairs programmes, and at least 90 hours are allocated to non-news programmes;
- in respect of BBC Two Northern Ireland, at least 60 hours are allocated to non-news programmes; and
- in respect of BBC One Northern Ireland and BBC Two Northern Ireland taken together, the BBC must ensure that it provides a range of genres in its programming that reflects Northern Ireland's culture.

BBC hours of first-run content in Northern Ireland dropped by 6% in 2020 to 568 hours

The decline in hours has been driven by news and current affairs. The largest decrease has been for current affairs, dropping by 16 hours to 72 hours (18%).

Overall, news content makes up the largest proportion of the BBC's output for Northern Ireland, comprising 51% of first-run hours. This is a decrease from 54% in 2019.

Figure 19: BBC hours of first-run UK-originated content for Northern Ireland, by genre



Source: Ofcom/broadcasters.

BBC announces plans for Broadcasting House

The BBC is to invest £48m on Broadcasting House in Belfast, which will focus on critical technology and infrastructure improvements to the listed building.¹⁰

The money will go towards refurbishing the historic building in the city centre and upgrading technology.

The BBC said its £48m investment would be used for:

- updating and upgrading broadcast technology, equipment and production spaces;
- reshaping the building to make it "an open, creative hub for staff and the wider creative sector";
- opening the rear of the site with a publicly-accessible plaza area, which is in line with Belfast City Council's vision for the wider regeneration of the Linen Quarter, where the building is located; and
- allowing staff to work more flexibly between the office and home, with less travel between BBC bases, and investment in more environmentally efficient vehicles.

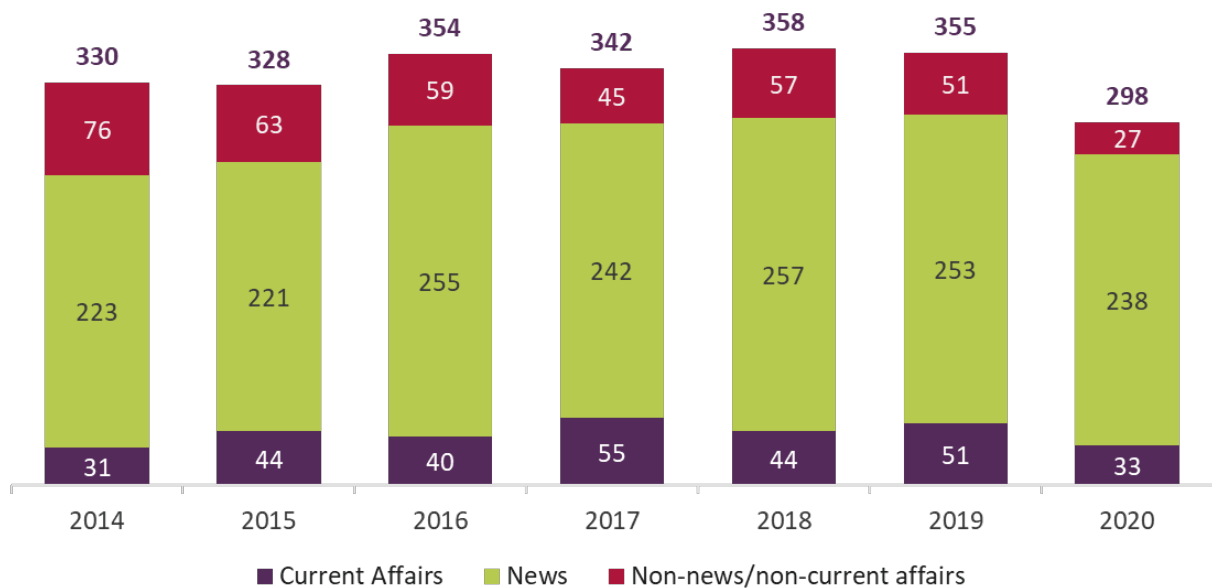
BBC Broadcasting House opened in 1941. Additional buildings were added in the 1970s and 1980s while the last substantial refurbishment was in the 1980s.

¹⁰ [BBC announce plans for BBC Broadcasting House in Belfast](#)

UTV hours of first-run content for Northern Ireland have fallen year on year, with 298 hours of programme output in 2020

The vast majority of UTV output is news content, comprising 80% (238 hours) of first-run programming on the channel. The decrease in hours has been across all genres. The largest fall has been for non-news/non-current affairs, dropping by 24 hours to 27 hours (47%).

Figure 20: UTV hours of first-run UK-originated content for Northern Ireland, by genre



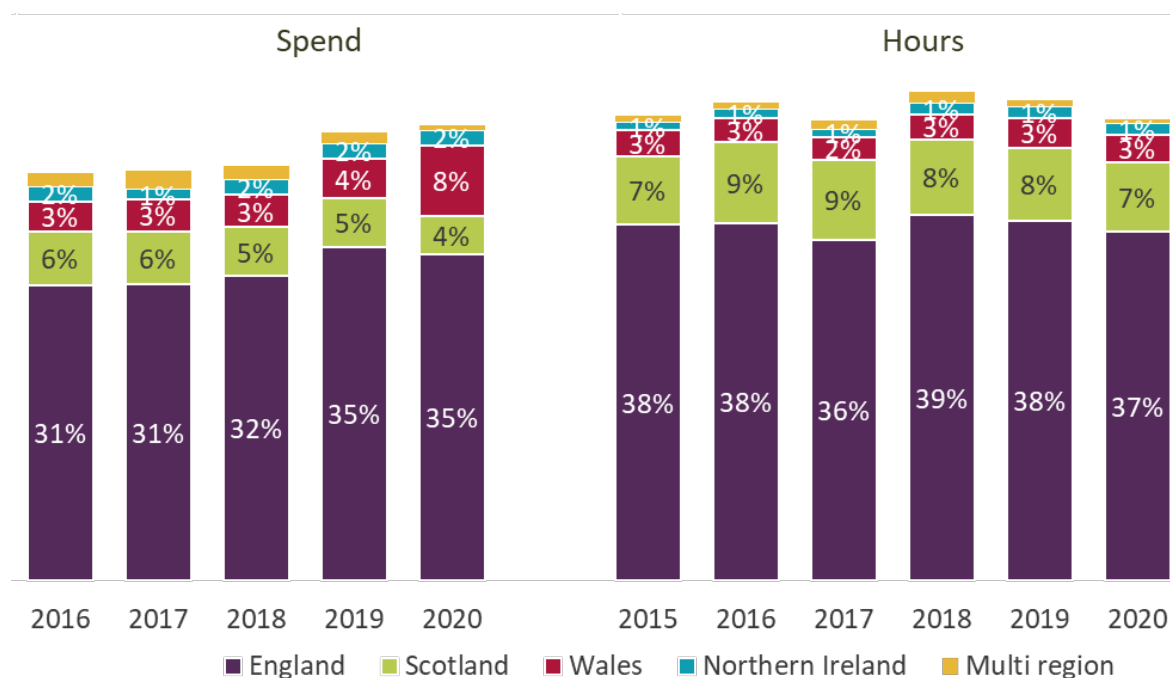
Source: Ofcom/broadcasters.

Network content produced in Northern Ireland

Public service broadcasters producing and commissioning programmes to be first broadcast on their network TV channels must make sure these programmes are made in a range of places around the UK. The broadcasters have quotas relating to this, in terms of the proportion of qualifying hours and the proportion of 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, 1.6% of qualifying first-run network spend was allocated to programmes qualifying as Northern Ireland productions, and 1.3% of hours. The proportion of qualifying spend in Northern Ireland is lower than for the other nations, and was slightly down; by 0.2pp, on 2019.

Figure 21: Proportion of qualifying network hours and spend outside London, all PSBs combined: 2016-2020



Source: Broadcasters / Ofcom

The PSBs have reduced the proportion of their network content made in Northern Ireland

Alongside the other PSBs, the BBC, which is generally responsible for the majority of qualifying network content made in Northern Ireland, reduced the proportion of its network spend in Northern Ireland from 3.5% to 1.7% in 2020, and the proportion of hours from 2.7% to 2.2%.

The BBC continues to make drama series in Northern Ireland, including *Line of Duty*, the sixth series of which was broadcast in 2021. Other new drama series broadcast in 2020 qualifying as Northern Irish included *The Windermere Children* and *My Left Nut*.

Figure 22: Proportion of qualifying network production in Northern Ireland, by PSB: 2016-2020

		2016	2017	2018	2019	2020
BBC	Spend (%)	3.1	2.4	3.1	3.5	1.7
	Hours (%)	2.1	1.9	2.4	2.7	2.2
ITV	Spend (%)	0	0	0.3	0	1.4
	Hours (%)	0	0	0.1	0	0.5
Channel 4	Spend (%)	0.5	0.5	1.1	1.0	1.0
	Hours (%)	0.5	0.7	1.1	0.5	1.8
Channel 5	Spend (%)	0.9	0.2	0.4	0.1	0
	Hours (%)	0.3	0.1	0.2	0.2	0

Source: Broadcasters / Ofcom.

BBC and Northern Ireland Screen renew partnership agreement

The BBC aims to increase its network television spend in Northern Ireland, as part of a renewed partnership with Northern Ireland Screen.¹¹

Now in its seventh year, the partnership has produced some notable successes, including the recent series of *Line of Duty*. With this new deal, the BBC aims to exceed its quota of commissioning 3% of network television content from Northern Ireland, which was the target for earlier agreements.

Between the previous partnership renewals in March 2017 and March 2021, the BBC invested £70m in network production from Northern Ireland, in addition to just under £10m from Northern Ireland Screen, which levered an additional £55m from a variety of third-party funders.

The renewed partnership arrangement will focus on four areas: infrastructure, development, skills and partnership, and a continued commitment to invest in TV production.

The BBC will collaborate with Northern Ireland Screen on the proposed new Screen Media Innovation Lab (SMIL), led by Ulster University as part of the Belfast Region City Deal.

Training programmes, delivered through the partnership, will be extended to ensure that the sector can be maintained with a talented and diverse workforce in the future. The Aim High trainee scheme will be recommissioned, with a focus on diversity, and both parties will work with others to provide apprenticeship opportunities for a wide range of young people.

Critically, the partnership will also foster a number of new high-profile commissions including *Her Name is Otilie*, made by Doubleband Films, and *Stich, Please!*, made by Waddell Media.

BBC NI and Northern Ireland Screen are also co-investing in an eight- to ten-part observational documentary series for BBC Two which will increase NI representation on the channel across the UK.

The new agreement will continue the commitment to Irish Language and Ulster Scots content, aiming to create opportunities for programmes to be viewed by audiences across the UK.

The Irish Language Broadcast Fund provided £3.04m in funding in 2020-2021

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.¹²

As of 2021-22, the ILBF had its budget raised to £4.9m in response to commitments made as part of the New Decade New Approach agreement.¹³ Of this funding, £4m comes from the UK Government's Department of Culture, Media & 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.

¹¹ [BBC commits to spending more of its TV budget in Northern Ireland](#)

¹² [Irish Language Broadcast Fund Overview](#)

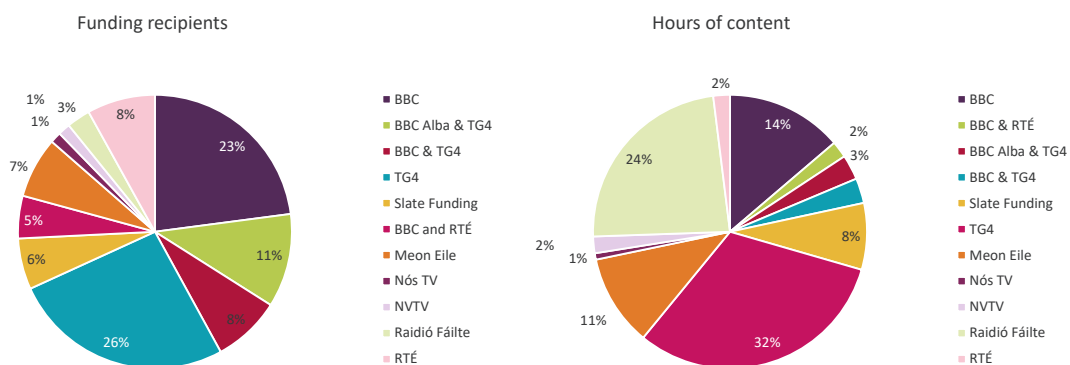
¹³ [Deal To See Restored Government In Northern Ireland Tomorrow](#)

The ILBF continued to fund a broad range of Irish-language content in 2020/21, for broadcast primarily on TG4, BBC Northern Ireland and RTÉ.

Recent programming highlights on TG4 include *Daniel sa Bhaile*, a special series hosted by Daniel O’Donnell from his home during the first lockdown, and *Liam O’Flynn – Píobaire*, a biography of the world-famous uileann piper.

Other notable commissions included *Nazi sa Ghaeltacht*, the untold story of a Nazi professor who, while ostensibly improving his Irish language skills in Donegal, was rumoured to have been a spy. This attracted a 10% audience share.

Figure 23: ILBF funding recipients / hours: 2020-2021



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 £1.17m in 2020-21

The Ulster-Scots Broadcast Fund (USBF) was established in 2010 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.¹⁴

As of 2021-22, the USBF had its budget raised to £2m in response to commitments made within the New Decade New Approach Agreement.¹⁵ This funding comes from the UK Department for Culture, Media & Sport through the British Film Institute to Northern Ireland Screen, which manages the fund.

Twenty-three projects received funding from the Ulster-Scots Broadcast Fund (USBF) in 2020-21. They included five interactive projects, five television development projects, one radio production and 12 television productions. Of the funding, 78.1% went to programming across the BBC, whether through BBC Northern Ireland (77.2%) or BBC Radio Ulster (0.9%). The remaining 21.9% went towards programming for NVTV (5.1%) and interactive content (16.8%).

USBF-funded content over the period included factual/entertainment and documentary programming, radio drama and interactive content. Commissioned highlights include the four-part series *A Stitch Through Time*, in which aspiring Northern Irish fashion designers take on the challenge of creating outfits inspired by the heritage of Ulster’s once mighty textiles industry;

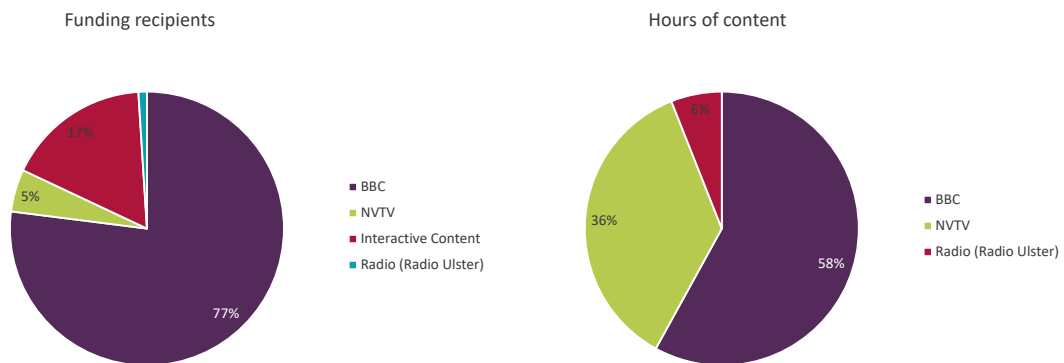
¹⁴ [Ulster-Scots Broadcast Fund Overview](#)

¹⁵ [Deal To See Restored Government In Northern Ireland Tomorrow](#)

Danders Aroon, a series of video walking guides that present aspects of Ulster-Scots history and culture pertaining to specific areas, and is designed to play through smartphones and tablets when on the move; and the three-part series *Sons of the Sod* for BBC Radio Ulster and BBC Sounds, in which actor Ian McElhinney reads an audio-enhanced version of the much-loved novel by WG Lyttle.

Broadcast highlights include the ten-part television travelogue series *Lough Foyle*, which features the history, natural environment and cultural heritage of the Foyle catchment area, with particular emphasis on Ulster-Scots elements of the hinterland.

Figure 24: USBF funding recipients / hours: 2020-2021



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.

Radio and audio

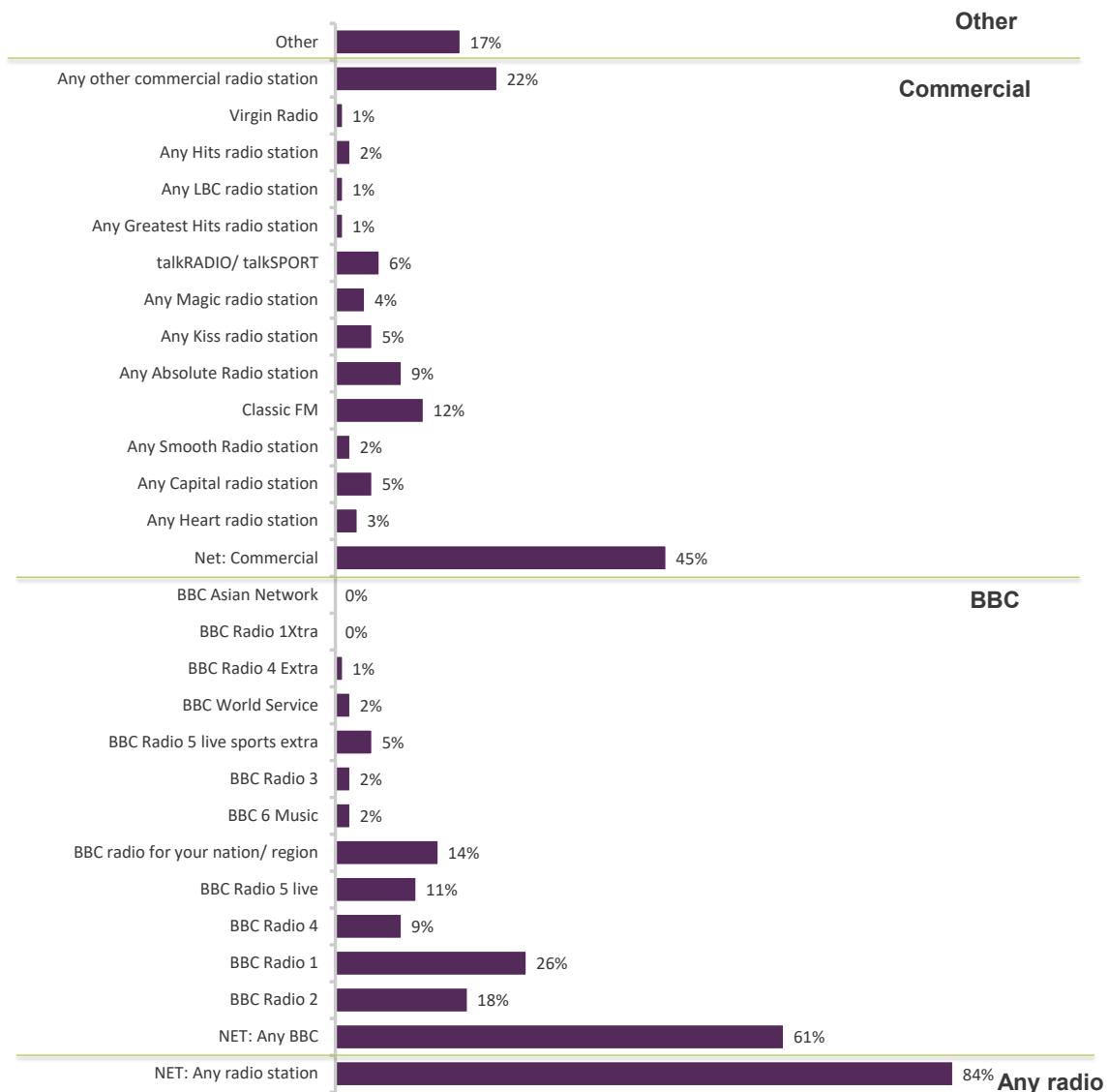
Introduction

Due to the coronavirus pandemic and the ensuing restrictions, the radio industry measurement body RAJAR suspended its fieldwork from the end of Q1 2020. As a result, we are unable to present the same extent of radio consumption data as in previous years. Instead, we have drawn from a range of Ofcom's own, syndicated and third-party consumer research to provide a snapshot of audio consumption in 2020, although these are not directly comparable with RAJAR.

Eight in ten people listen to the radio

Radio continues to be popular in Northern Ireland: 84% of adults in Q1 2021 said they had listened to the radio in the past week. Ofcom's Audio Survey research includes listening to local radio stations in Northern Ireland, but individual brands are not identified and so are not listed below. However, we know from previous RAJAR data that stations such as Cool FM / Downtown, U105, Q Network and BBC Radio Ulster / Foyle are more popular in Northern Ireland than their counterpart stations in other parts of the UK.

Figure 25: Weekly radio stations in Northern Ireland: 2021

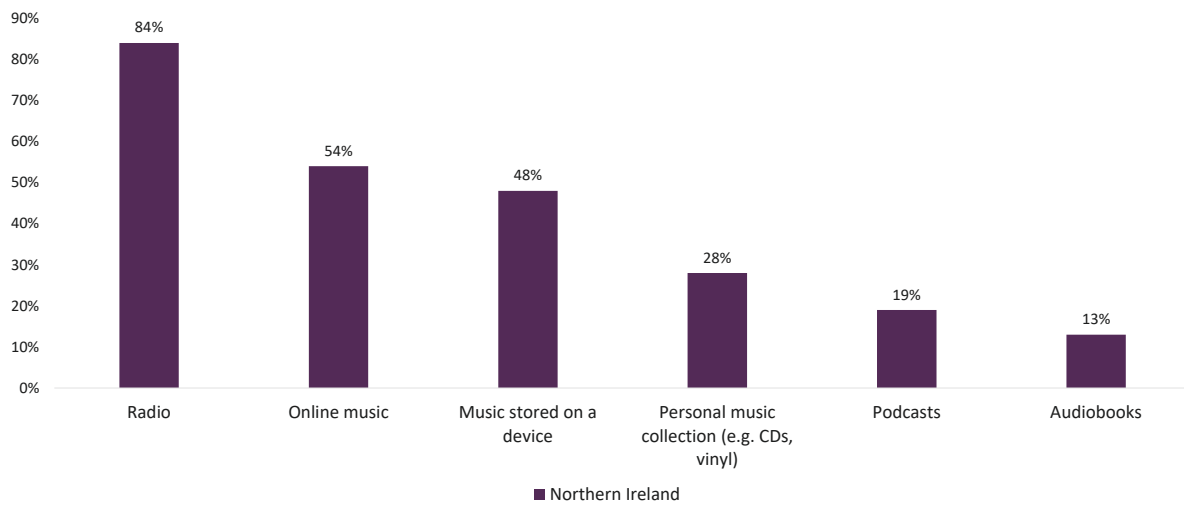


Source: Ofcom Audio Survey 2021. Q2. Which, if any, of these radio stations have you listened to in the last 7 days? n=2287. Base: UK online adults 16+, fieldwork 3-7 March 2021.

More than half of adults in Northern Ireland listen to online music services

While more than three-quarters of adults in Northern Ireland listen to the radio each week, more than half listen to online music services.

Figure 26: Audio listened to each week: Northern Ireland

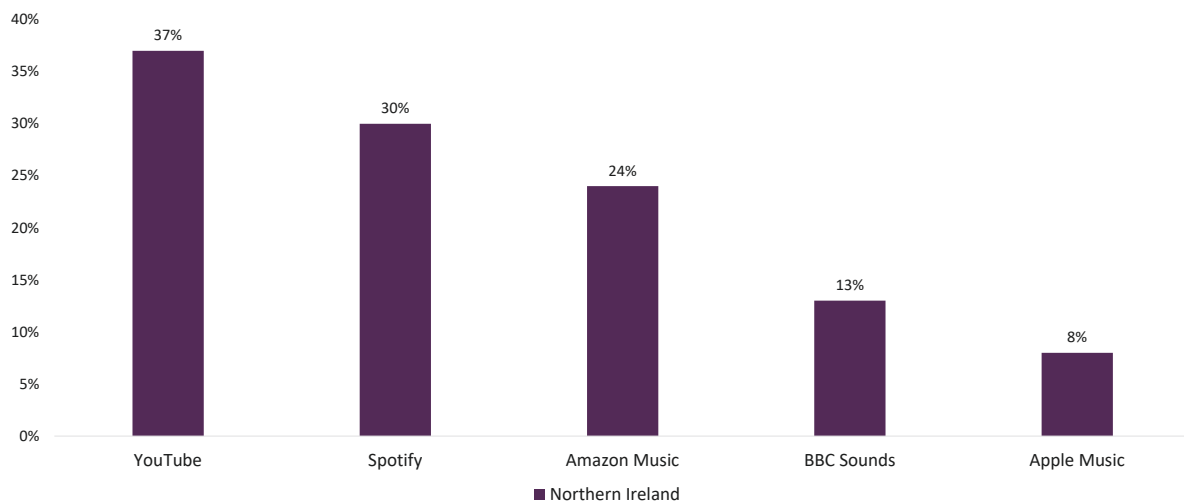


Source: Ofcom Audio Survey, March 2021.

Q1. How often, if at all, do you do any of the following? Q2. Which, if any, of these radio stations have you listened to in the last 7 days?

The most popular platform in Northern Ireland for listening to online audio is YouTube, used by more a third of adults each week.

Figure 27: Platforms used weekly for any audio: Northern Ireland



Source: Ofcom Audio Survey, March 2021

Ofcom awards first small-scale DAB radio multiplex licence for Northern Ireland

Derry / Londonderry will now be able to have a range of new radio services, following Ofcom's award of a small-scale radio multiplex licence for this area to Foyle DAB Ltd.

Small-scale DAB will expand local digital radio coverage and ensure that listeners in the area can tune into a diverse range of radio services on the digital audio broadcasting platform.

It will give community radio, smaller commercial radio stations and new entrants an affordable pathway to terrestrial digital radio, ensuring the continued availability of a diverse range of radio services on the digital platform, which accounts for an increasing amount of radio listening.

Foyle DAB Ltd was awarded the licence to operate the multiplex for Derry / Londonderry in March 2021. Successful applicants have 18 months from the date of the award to launch the service.

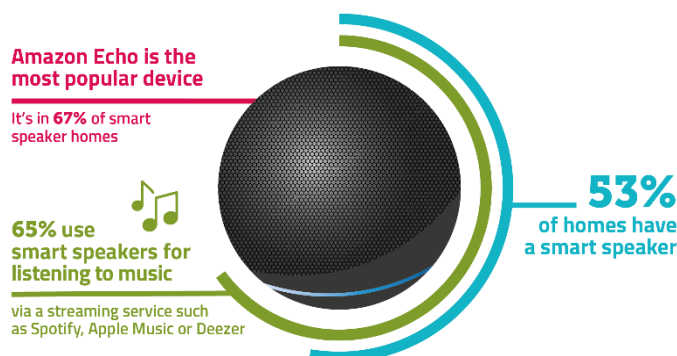
Following a second round of licensing covering the north west of England and north east Wales, multiplex licences will be advertised towards the end of the year for a further 25 locations, including Belfast and Lisburn.

A small-scale radio multiplex service can provide about ten stereo radio stations (and about 20 stereo services if DAB+ is used).

Audio trends

Smart speakers are in over half of Northern Ireland homes

A significant amount of new digital listening is done through smart speakers; more than half of homes in Northern Ireland have them (53%). The Amazon Echo is by far the most popular type (found in 67% of homes in Northern Ireland which have a smart speaker), followed by Google Home/Google Nest (26%).



The most popular reasons given by users in Northern Ireland for using smart speakers were: to listen to music via a streaming service like Spotify, Apple Music or Deezer (65%) to listen to a live radio station (64%) or to get weather information (37%). These were followed by about four in ten users searching for general information (28%), using it as an alarm/personal reminder (25%) or getting news reports (28%).

DAB radios are another important way for people to listen to radio; 36% of households in Northern Ireland have a DAB set in their home, compared to 39% in Scotland and 40% in Wales.¹⁶

¹⁶ Ofcom Technology Tracker 2021

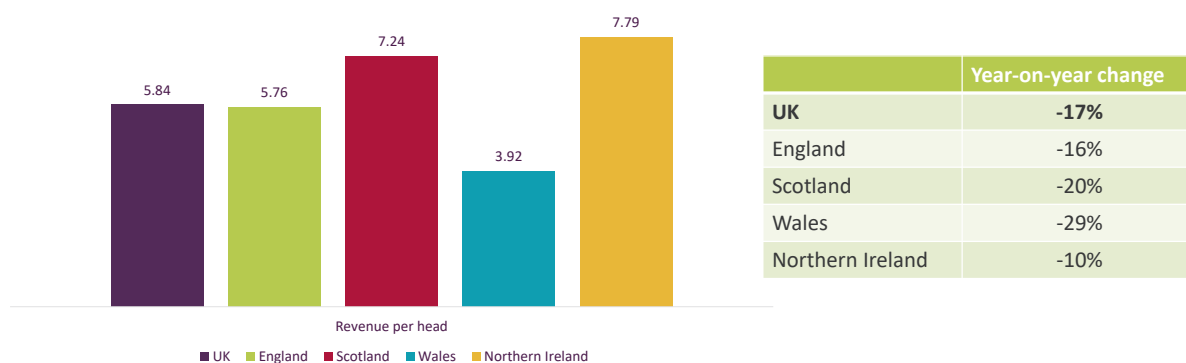
Listening to live radio is the most popular audio activity in Northern Ireland

Listening to live radio remains the most popular audio activity in Northern Ireland, with 81% of adults tuning in. But other types of listening are gaining in popularity. Some 43% of adults listen to podcasts, while 39% listen to a paid-for music streaming service. Thirty-six per cent listen to a free streaming service while 31% listen to catch-up radio and one in five (20%) listen to audiobooks.¹⁷

Commercial radio revenue for local stations decreased by 10% in 2018

Local analogue commercial radio stations in Northern Ireland, such as Cool FM, Q Radio and U105, generated £7.79 per head of population in 2020, a fall of 10% on the previous year but still higher than the other UK nations.

Figure 28: Local/commercial radio revenue: 2020



Source: Ofcom/broadcasters. NB: These figures relate solely to relevant turnover reported against analogue licences (local analogue commercial) and include local and national revenues and sponsorship i.e. not only revenues that relates to adverts aimed at the specific nation. YoY figures adjusted for CPI at 2020 prices.

¹⁷ Ofcom Technology Tracker 2021