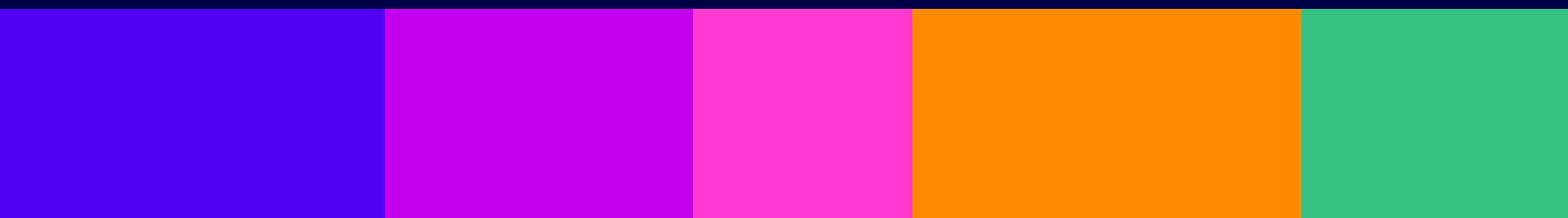
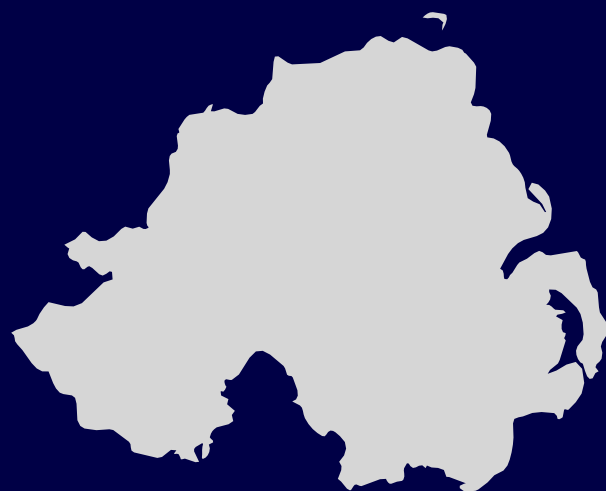




Media Nations

Northern Ireland 2026

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Overview

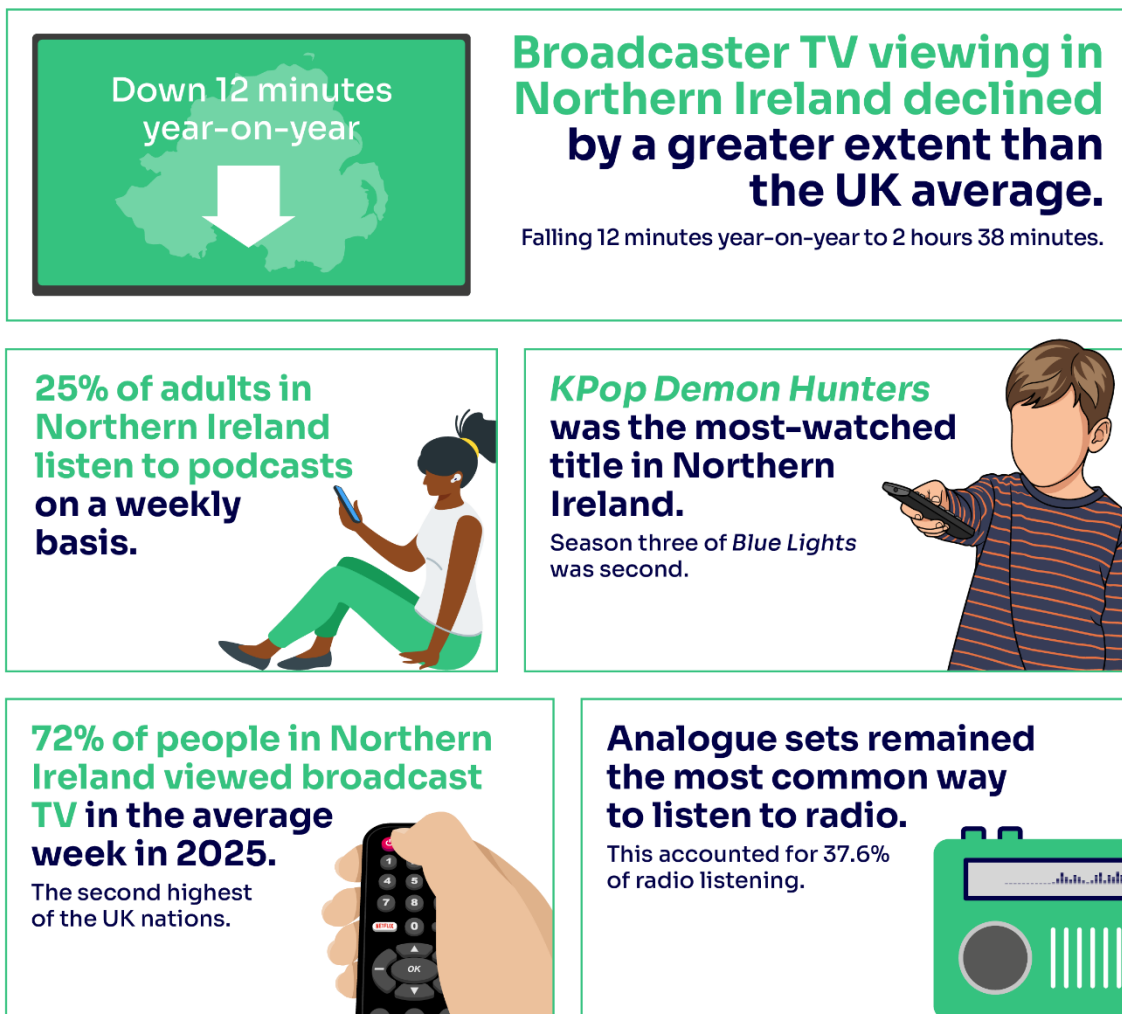
Introduction

This *Media Nations: Northern Ireland* report examines key trends across the media sector and explores how audiences in Northern Ireland are served. We take a cross-platform approach, covering broadcast TV and radio alongside digital services such as online video and audio streaming.

New this year, the report also includes analysis of device ownership and broader media consumption habits, providing context for our assessment of the TV & video and radio & audio sectors. The report draws on a range of data sources, including information collected directly from licensed television and radio broadcasters (covering output, spend and revenue), Ofcom's own consumer research, and Barb and RAJAR data (for audience consumption).

In addition to this Northern Ireland report, separate Media Nations reports are published for the UK as a whole, Scotland and Wales.

Key findings



Media in context

Introduction

People consume a wide range of media, across multiple formats and devices. In this section we draw from a range of data sources to examine device ownership and consumption of news by people in Northern Ireland, providing background to our analysis of TV & video and the radio & audio sectors.

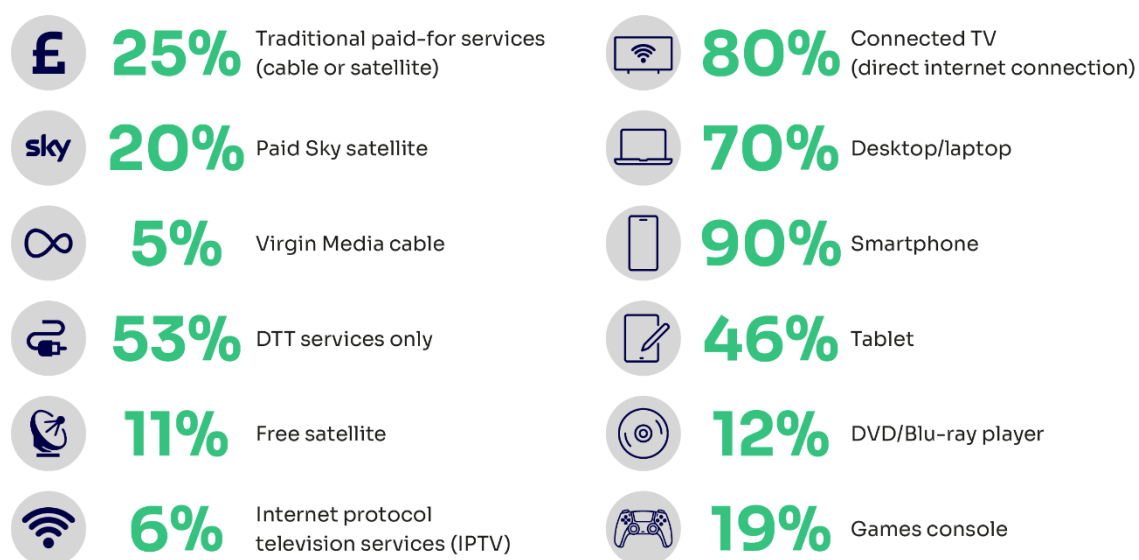
Media and devices

More than half of households in Northern Ireland rely on DTT services

The proportion of households in Northern Ireland with at least one working TV set remained steady at 95% in Q1 2026. More than half (53%) of households in Northern Ireland relied on DTT services only, without satellite, cable or IPTV services, well ahead of the UK average of 28%. The level of subscriptions to traditional cable or satellite services also remained the lowest of the UK nations, falling from 30% in Q1 2025 to 25% in Q1 2026.

Households receiving IPTV services rose to 6%, from 4% in Q1 2025. Freely became the most widely received IPTV service, present in 4% of households in Q1 2026.

Figure 1: Take-up of TV platforms in Northern Ireland: Q1 2026



Source: Barb Establishment Survey Q1 2026. 'DTT services only' means households with an aerial only and not cable, satellite or IPTV. IPTV includes EE TV, TalkTalk, YouView, Sky Stream and Freely.

Ownership of connected TVs and other connected devices

Nine in ten households (90%) had at least one smartphone, in line with the UK as a whole (92%), although ownership of several other devices was some way behind the UK average. Ownership of a desktop or laptop computer was at 70% compared to 81% across the UK, tablets were present in 46% of homes compared to 54%, and DVD or Blu-ray players were also less common, present in 12%

of homes, compared with 28% across the UK. Compared to the UK average of 25%, relatively few households had a games console,¹ with ownership at 19%, the lowest of the UK nations.

Conversely, eight in ten households (80%) in Northern Ireland had at least one TV connected directly to the internet.² This was higher than any other UK nation and well above the UK average of 72%.

Broadband in Northern Ireland

According to our [Connected Nations](#) reports, as of January 2026, 99% of all homes in Northern Ireland were in an area able to receive superfast broadband (download speeds of at least 30 Mbit/s). Full fibre broadband – offering the fastest speeds – is now available to 94% of households in Northern Ireland, with availability for rural households rising from 89% in January 2025 to 91% in January 2026. In 2025, where full fibre was available, 62% of premises were connected, compared to 53% in 2024.

News

BBC One is the most commonly used single source of news by people in Northern Ireland

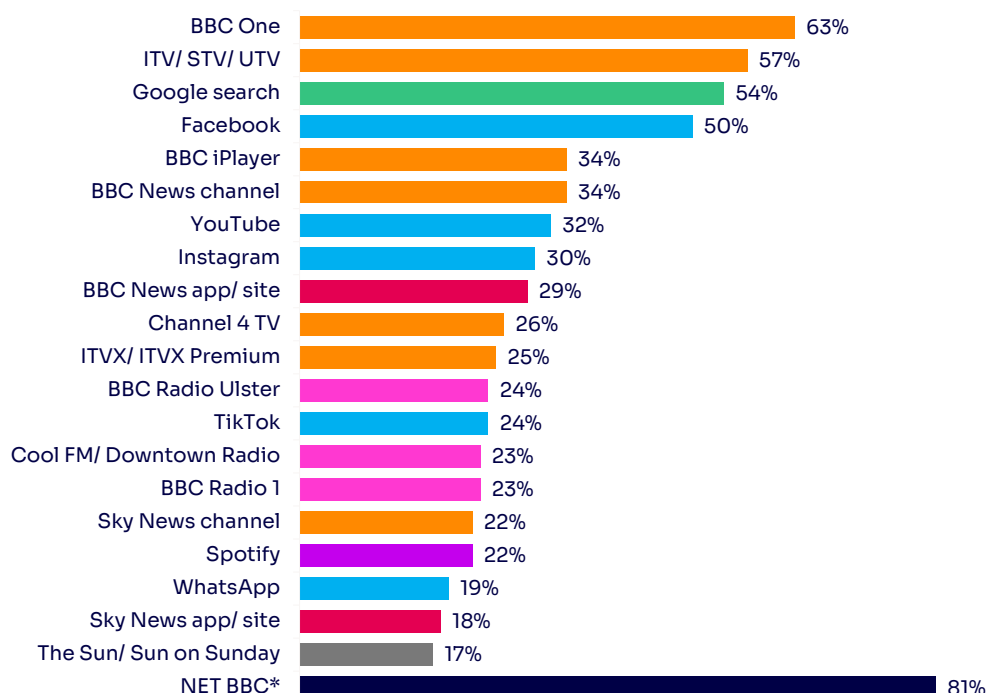
Ofcom's News Consumption Survey found that 63% of people aged 16+ in Northern Ireland reportedly used BBC One for news, making it the most used way to access news, followed by ITV1/UTV at 57%. Google search (54%), Facebook (50%) and BBC iPlayer rounded out the rest of the top five.³ BBC News online (29%) was the most used broadcaster app or site for news, and the ninth most used individual way to access news in Northern Ireland. The radio station most used for news was BBC Radio Ulster, named by 24% of those in Northern Ireland followed by Cool FM and BBC Radio 1 (both at 23%). The Sun / Sun on Sunday was the only newspaper brand to feature in the top 20 news sources in Northern Ireland (17%).

¹ Includes PlayStation 2/3/4/5, XBOX/360/One/Series S/Series X, or Nintendo Wii/Wii U/Switch/other.

² This does not include TVs connected via other devices such as a dongle or games console.

³ The News Consumption Survey was changed this year, and we now ask about ways of being informed or entertained more generally before focusing on specific ways to access news. This was done to better capture people's passive and incidental news consumption. This has resulted in platforms like Google search being more prominent as a way of accessing news, though notably not for statements such as 'most important news source'.

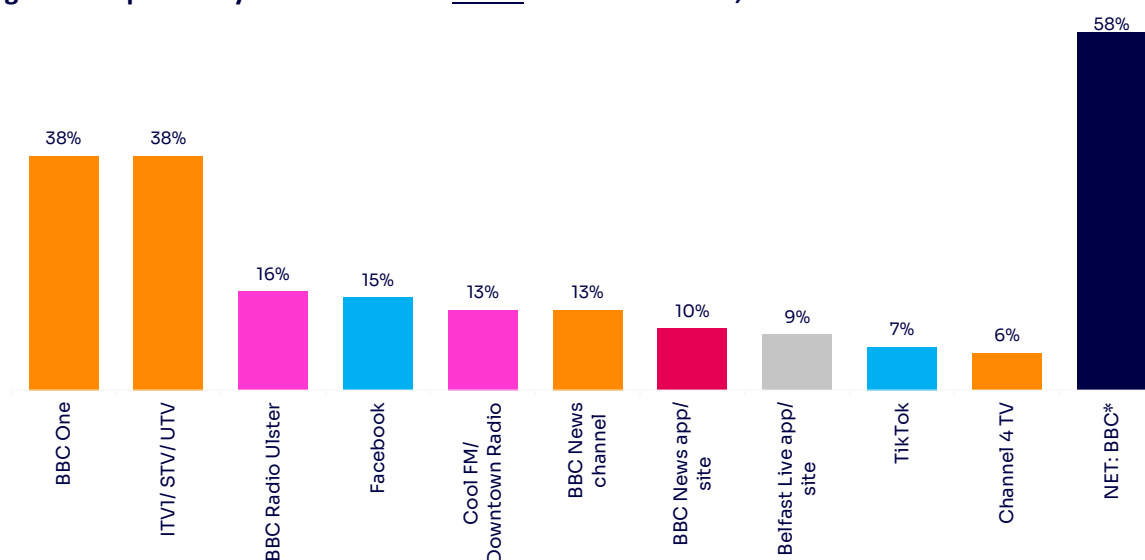
Figure 2: Top 20 ways to access news in the past month in Northern Ireland



Source: Ofcom News Consumption Survey 2026. Question: D1-D22. Which, if any, of the following [MEDIA TYPE] have you seen or heard news on in the last month? *NET BBC includes BBC TV/ BBC iPlayer, BBC apps/ sites, BBC Radio, BBC Sounds. Base: All adults in Northern Ireland (600)

Television programmes were the main way for people to access news about Northern Ireland, with BBC One and ITV1/UTV remaining the top two ways used (38% each), and BBC Radio Ulster in third place (16%). Fifty-eight per cent of people in Northern Ireland used a BBC source for news about Northern Ireland. Facebook was the most commonly reported social media for accessing news about Northern Ireland.

Figure 3: Top ten ways to access news about Northern Ireland, in Northern Ireland



Source: Ofcom News Consumption Survey 2026. Question: F2. Looking at all of the sources of news that you have seen or heard news on in the last month, which of these have you seen or heard news on about what is going on in Northern Ireland? *NET BBC includes BBC TV/ BBC iPlayer, BBC apps/ sites, BBC Radio, BBC Sounds. Base: Northern Ireland (600).

The close parity between BBC One and UTV as sources of news about Northern Ireland is reflected in viewing figures for their weekday early evening news programmes. Barb data shows that, in 2025, 22% of adults aged 16 and over in Northern Ireland (331,000 people) watched *BBC Newsline* in an average week. The same proportion and number (22%, or 331,000 people) watched *UTV Live*. This continues a pattern seen in previous years, with similar weekly reach recorded in 2024 (*BBC Newsline*: 26%; *UTV Live*: 25%) and 2023 (both *BBC Newsline* and *UTV Live*: 25%). When combined, weekday early evening news from UTV and BBC One reached 34% of viewers (519,000) in an average week in 2025.⁴

⁴ Barb as-viewed. Adults aged 16+ in Northern Ireland, 3+ mins consecutive viewing. Weekday broadcasts between 18:00-19:00.

TV and video

Market developments

Northern Ireland Screen sets out new four-year plan for growth

In April this year, Northern Ireland Screen unveiled a new four-year strategy aimed at building on the region's growing reputation as a centre for film, television and digital content production. The plan, titled [*The Full Picture*](#), sets out how the agency intends to develop the screen industries between now and 2030. The strategy focuses on three main areas: growing the economy, developing skills, and supporting locally-made stories with the potential to reach global audiences. It also highlights the importance of culture and heritage, including Irish-language production and archive work.

The plan places a strong emphasis on attracting more large-scale productions while supporting local writers and producers. There is a particular focus on helping home-grown ideas develop into projects that can succeed internationally.

Another priority is closer collaboration across the island of Ireland. Northern Ireland Screen is exploring ways to make it easier to co-produce projects with partners in the Republic of Ireland, allowing productions to benefit from funding and incentives on both sides of the border.

Innovation is also central to the strategy. Northern Ireland Screen wants to expand the use of new technologies, including virtual production facilities such as Studio Ulster, and to encourage responsible use of emerging tools like artificial intelligence.

The announcement follows a strong period for the sector. Northern Ireland Screen said that the productions it supported had generated more than £477m for the local economy over the past four years, exceeding its original target. Recent projects filmed or produced in Northern Ireland include *Blue Lights* and *How to Get to Heaven from Belfast*, alongside major international productions.

Small Indie Fund awards for local companies

Launched in 2020, the BBC's [*Small Indie Fund*](#) supports the growth of small qualifying independent production companies from across the UK with turnovers below £10m across Film, Scripted, Unscripted and Children's genres.

Five local companies in Northern Ireland are among 40 across the UK receiving support from the Small Indie Fund and the Radio & Music Indie Development Fund.

All companies will receive strategic investment from a total £1.3m pot, mentors from the commissioning teams, and a programme of introductions to wider BBC teams, to help them develop their ideas and businesses.

Northern Ireland companies receiving awards are: barry crerar Ltd (Small Indie Fund); Fabin Films (Small Indie Fund); Nice One Productions (Small Indie Fund); Slack Panda Productions (Radio & Music); and Walk On Air (Radio & Music).

Blue Lights writers win another BBC commission

Hot Sauce Films, founded by *Blue Lights* writers Declan Lawn and Adam Patterson, has received a significant new network commission from the BBC.

D-Notice is a British political thriller set in the world of investigative journalism. The six, hour-long episodes are written and produced by Lawn and Patterson. The duo set up Hot Sauce in 2022, before securing investment from Sony Pictures Television.

Patterson and Lawn are both former investigative journalists who met while working on the BBC's *Panorama* programme before moving into writing drama.

It is the pair's third project for the BBC following *The Salisbury Poisonings* and *Blue Lights*. Filming will take place in Belfast and London.

Viewing trends

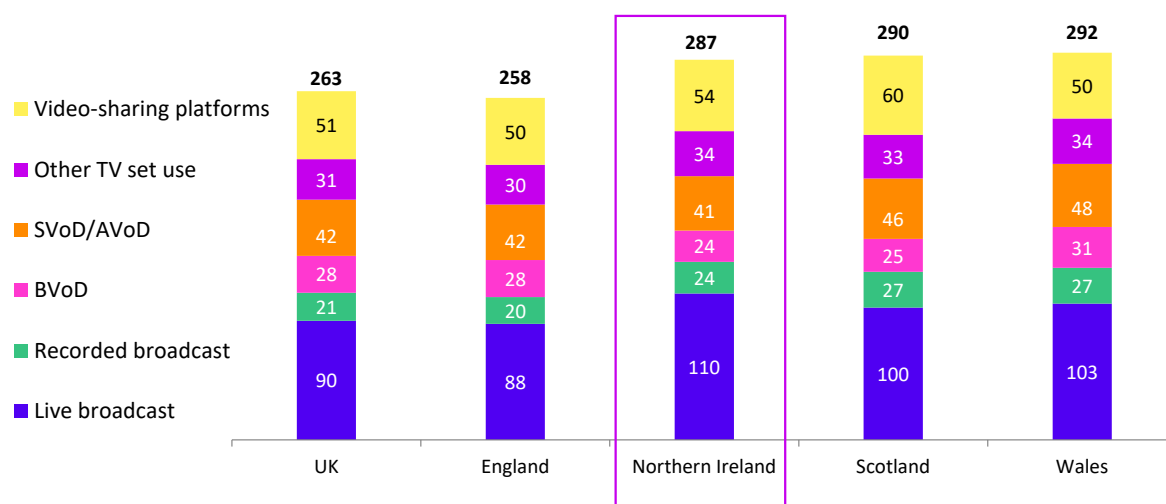
Overall in-home video viewing remained stable in Northern Ireland

In 2025, people in Northern Ireland watched an average 4 hours 47 minutes of video content at home per day, a one-minute decline year-on-year. Northern Ireland again had the lowest viewing of the devolved nations, although the difference was lower than in previous years.

Despite seeing the largest decline, live broadcast TV was watched more in Northern Ireland than in any other UK nation (1 hour 50 minutes; a 16-minute decrease). Viewing of recorded broadcast TV remained stable at 24 minutes, while broadcaster video-on-demand (BVoD) increased by 2 minutes. Total broadcaster TV content, including live TV, recorded TV and BVoD, accounted for 55% of video viewing time (2 hours 38 minutes), a decrease of 15 minutes (-9%) since 2024.

Subscription video-on-demand (SVoD) such as Netflix, advertising video-on-demand (AVoD) such as Pluto TV, and video-sharing platforms (VSPs), such as YouTube, saw the biggest year-on-year increases. SVoD/AVoD services had a 4-minute increase, watched for 41 minutes on average, accounting for 14% of total video viewing time. Average daily VSP viewing increased by 5 minutes year-on-year to 54 minutes, equating to 19% of all video viewing time.

Figure 4: Total in-home daily video viewing minutes per person, by platform and nation: 2025

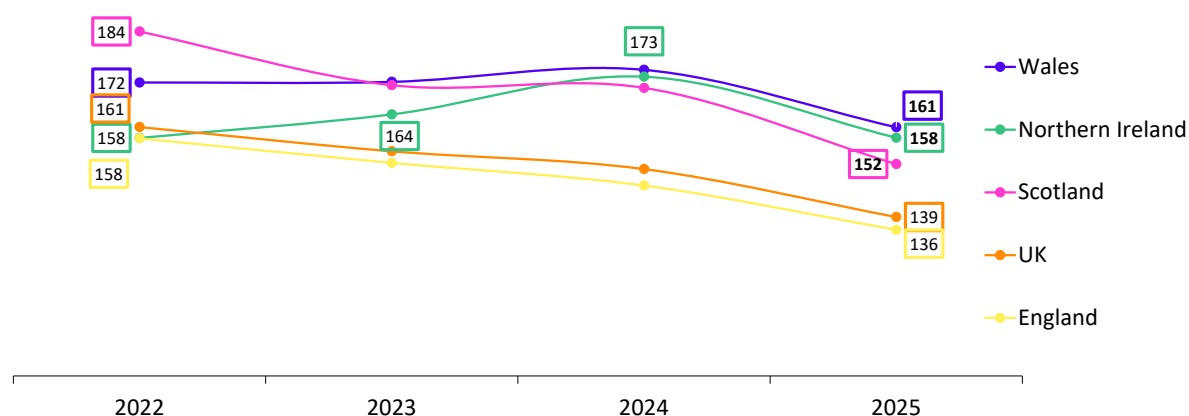


Source: Barb as-viewed on TV sets and other devices using the home's WiFi network. All individuals 4+.
 'Broadcaster content' includes live TV, recorded playback and BVoD. 'Other TV set use' includes viewing of some SVoD/AVoD/VSP that cannot be definitively measured, as well as some unmeasured broadcast channels, some EPG/menu browsing, viewing when the audio is muted, piracy, unmeasured box-sets/pay-per-view content, and non-video internet activity through a PC or other device connected to the TV. 'SVoD/AVoD' excludes viewing of NOW, which is captured within BVoD along with Sky Go/Sky TV On Demand (these two services stream the same content, so measured viewing cannot be separated).

Broadcaster TV viewing in Northern Ireland fell more than the UK average

Average daily viewing to broadcaster TV fell across all nations in 2025, with the UK average declining by 8% (12 minutes). Northern Ireland experienced a slightly steeper decline of 9% year-on-year. As a result, average viewing in 2025 decreased to 2 hours 38 minutes per day, matching 2022 levels and reversing the increases seen in 2023 and 2024.

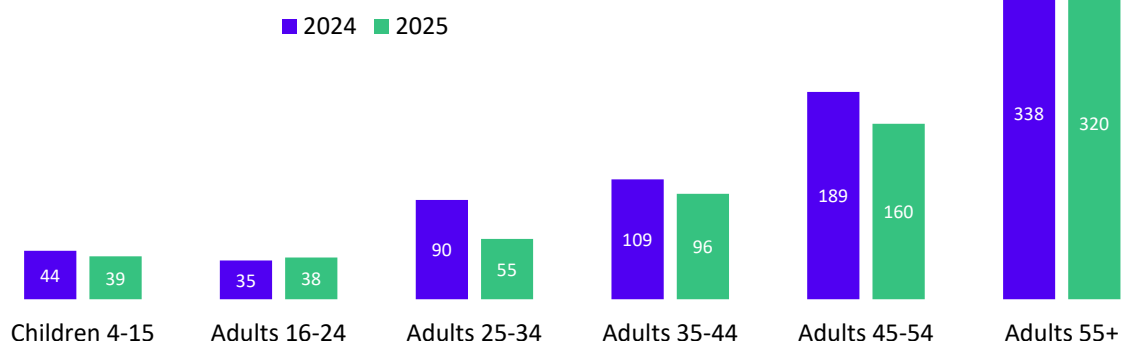
Figure 5: Average daily minutes viewed of broadcaster TV per person, by nation: 2022-2025



Source: *Barb as-viewed, all individuals 4+, BBC areas, Live + recorded playback and BVoD.*

Average daily viewing across all age groups in Northern Ireland declined except for young adults aged 16-24 who saw a slight increase – up by three minutes since 2024 to 38 minutes in 2025. This growth was driven by increases in both linear TV (live and recorded playback) and BVoD viewing. Linear TV viewing rose by just over one and a half minutes year-on-year, while BVoD viewing increased by just under one minute.

Figure 6: Average daily minutes of broadcaster TV viewed in Northern Ireland, by age group: 2024-2025

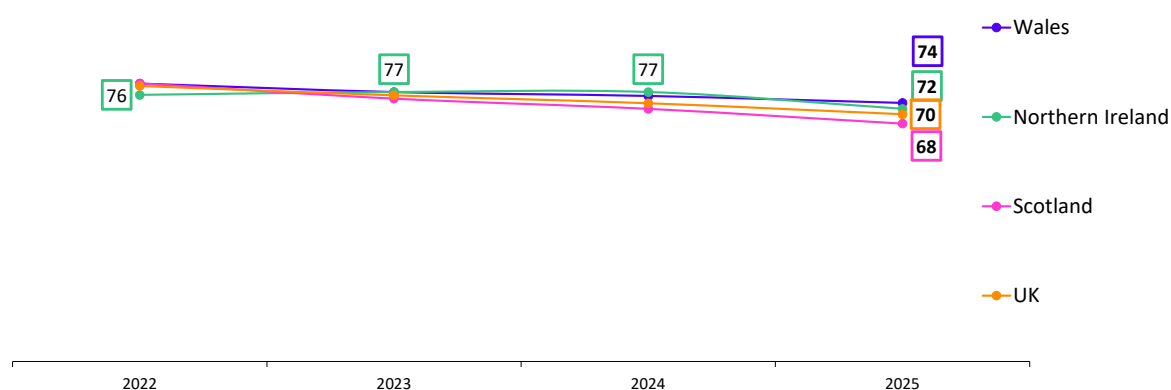


Source: *Barb as-viewed. Live + recorded playback and BVoD, Small year-on-year differences in minutes are often not statistically significant.*

Reach of broadcaster TV in Northern Ireland declined in 2025, but remains above the UK average

Broadcaster TV reach has declined across all UK nations in recent years, with Northern Ireland being the only exception until 2025. Average weekly reach in Northern Ireland remained stable with around 76% of individuals watching at least 15 consecutive minutes of broadcaster TV between 2022 and 2024, before falling to 72% in 2025. This decline means that broadcaster TV now reaches a smaller proportion of people in Northern Ireland than in Wales (74%), whereas Northern Ireland previously had the highest reach of any nation in 2024. Nevertheless, its reach remains above the UK average of 70%. Northern Ireland continues to have the highest reach for linear TV, at 60%, despite falling seven percentage points year-on-year. In contrast, BVoD reach is comparatively lower, at 42%, making it joint lowest among the nations alongside Scotland and below the UK average of 46%.

Figure 7: Average weekly reach % of broadcaster TV, by nation: 2022-2025



Source: Barb as-viewed. All individuals 4+, BBC areas, live + recorded playback and BVoD. Reach criteria 15+ consecutive mins. Note: England figures not shown on the chart – they match the data for the UK as a whole.

ITV had a higher share of broadcaster TV viewing in Northern Ireland than in the other nations

In 2025, the PSBs, including their BVoD services, accounted for 73% of all broadcast TV viewing in Northern Ireland, the highest share among the UK nations. The BBC attracted the largest share of viewing of any PSB in Northern Ireland, albeit lower than the UK average, accounting for 30% of viewing across all the channels and BBC iPlayer, up slightly year-on-year and matching the level in Scotland. ITV/UTV also had year-on-year growth, accounting for 26% of viewing in Northern Ireland, higher than in the other nations. When looking at the individual channels, BBC One accounted for 20% of viewing, flat year-on-year, and in-line with the UK average. ITV1/UTV was just behind at 19%, also stable year-on-year, and above the UK and nation averages.

Figure 8: Share (%) of broadcaster TV viewing for the PSBs' channels, by nation: 2025



Source: *Barb as-viewed* (all individuals 4+). Main channels include +1 channels where relevant. Portfolio groups include all other channels besides the main channel. Includes BVoD services.

Use of BVoD and SVoD

The proportion of households in Northern Ireland that received at least one SVoD service was 76% in Q1 2026, up from 74% in Q1 2025.⁵

Amazon Prime Video remained the most widely subscribed SVoD service in Northern Ireland, available in 63% of homes, up from 59% in Q1 2025. As a result, Northern Ireland is still the only UK nation in which Netflix is not the leading SVoD service. Netflix was present in 55% of households, unchanged year on year. Disney+ continued to rank third, with subscriptions in 19% of homes. A range of smaller SVoD providers also maintained a presence in the market, including Paramount+ (8% of homes) and Apple TV+ (5%).

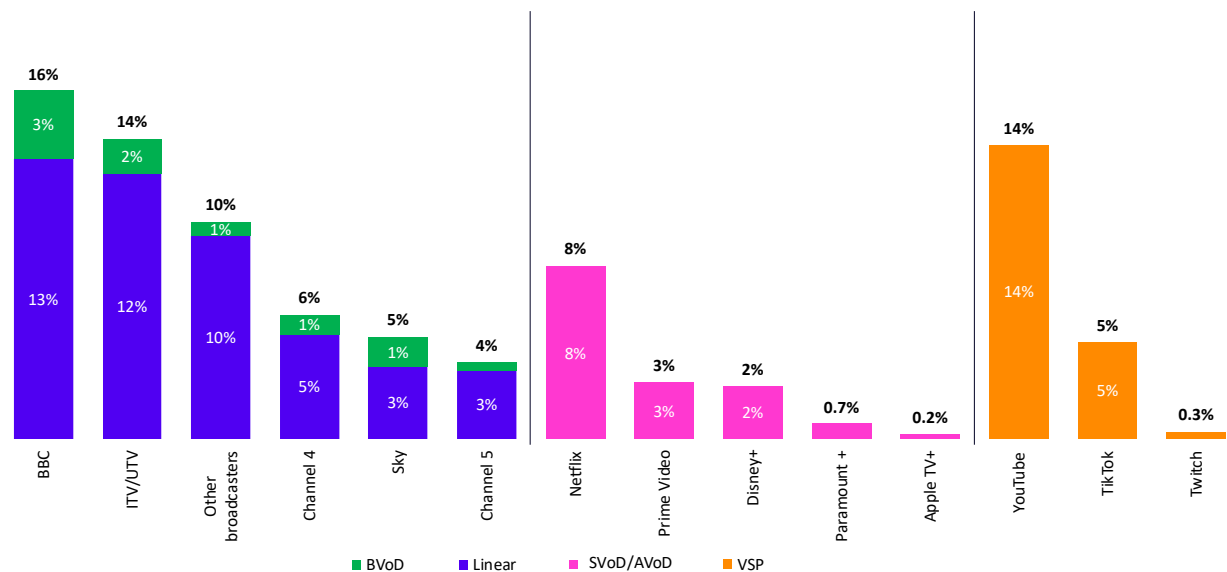
In 2025, BBC accounted for 16% of all in-home video viewing across devices by all individuals, with the majority coming from linear broadcasting (13%) despite declining two percentage points year-on-year, and a smaller contribution from BVoD (3%, level year-on-year). ITV/UTV accounted for 14% overall, driven largely by linear channels (12%, down one percentage point year-on-year) alongside a 2% contribution from BVoD.

Channel 4 and Sky accounted for 6% and 5% of in-home video viewing respectively, while Channel 5 held a 4% share, all level year-on-year. Other broadcasters collectively represented 10% of viewing, almost all of which came from linear television.

Although Netflix was present in fewer households than Amazon Prime Video, it remained the leading SVoD service by viewing share, accounting for 8% of in-home video viewing, level with 2024. Prime Video saw a small increase in 2025, placing it ahead of Disney+ which fell by one percentage point. YouTube accounted for 14% of all in-home video viewing among all individuals, up two percentage points on 2024, while TikTok and Twitch saw small declines.

⁵ Barb Establishment Survey Q1 2025 & Q1 2026, includes households receiving free and paid subscriptions.

Figure 9: Share of total video viewing for individual services in Northern Ireland: all individuals aged 4+: 2025



Source: Barb as-viewed on TV sets and other devices using the home's WiFi networks, individuals aged 4+. 'Linear' includes broadcast content watched live or via recorded playback. Broadcaster services include all portfolio channels.

Almost half of all in-home viewing of YouTube is on a TV set

Sixty-six per cent of individuals aged 4+ in Northern Ireland watch at least three minutes of YouTube per week in the home, across all devices. This figure increases to 71% among adults aged 16-34.

Figure 10: Average weekly reach (%) of YouTube, by nation: 2025



Source: Barb as-viewed, all devices using the home's WiFi network. Reach criteria: 3+ consecutive minutes.

Individuals in Northern Ireland spent 40 minutes per day on average viewing YouTube across all devices in the home in 2025. The average time spent viewing YouTube on a TV set increased by 27%, from 15 minutes in 2024 to 19 minutes per day in 2025. Across the whole of 2025, among all

individuals, 48% of in-home YouTube viewing in Northern Ireland was via a TV set, up from 43% in 2024.⁶

Figure 11: Average daily minutes viewed of YouTube per person, by nation:2025



Source: Barb as-viewed on TV sets and other devices using the home's WiFi network.

According to Ofcom's VoD Survey, videos up to 15 minutes long were the most popular forms of content viewed on YouTube in Northern Ireland, with 54% of adults and teens aged 13+ in Northern Ireland reporting watching this form of content in the past three months. 51% claimed to have watched YouTube shorts, and just over four in ten (41%) claimed to have watched videos longer than 15 minutes, indicating that, in line with trends across the nations, whilst short-form content continues to be popular, longer videos also appeal to many viewers.⁷

Most-watched genres, programmes and films in Northern Ireland

The arts and religion & ethics genres recorded the largest increases in viewing time among all individuals aged 4+ in Northern Ireland between 2024 and 2025, with both genres growing by 20%. In 2025, average viewing across the year reached 23 minutes overall (broadcaster TV) for arts and 56 minutes for religion & ethics. Growth was driven by increases in viewing across both linear channels and BVoD services.

Viewing of the children's genre declined by 2% overall. This was primarily due to a substantial decrease in viewing on broadcast channels (-32%). However, children's programming recorded the largest growth of any genre on BVoD, with viewing increasing by 71%, partially offsetting the decline in broadcast viewing.

In 2025, the most-watched title in Northern Ireland was Netflix's animated family film *KPop Demon Hunters*, averaging 616,000 viewers on TV sets. The first episode of the third season of local police drama *Blue Lights* was at number two with 508,000 viewers, followed by popular children's show *Ms. Rachel* (433,000 viewers) which launched on Netflix in 2025, after years of being a YouTube hit. The top ten was split equally between broadcast and streamer content, with Netflix in three of the top five places. Celebrity entertainment remained strong for PSBs, with four titles ranking in the top ten, three on ITV/UTV and one on BBC.

⁶ Barb as-viewed.

⁷ Ofcom VoD Survey 2026.

Figure 12: Top ten most-watched programmes/films in Northern Ireland (highest-performing episode per title): 2025

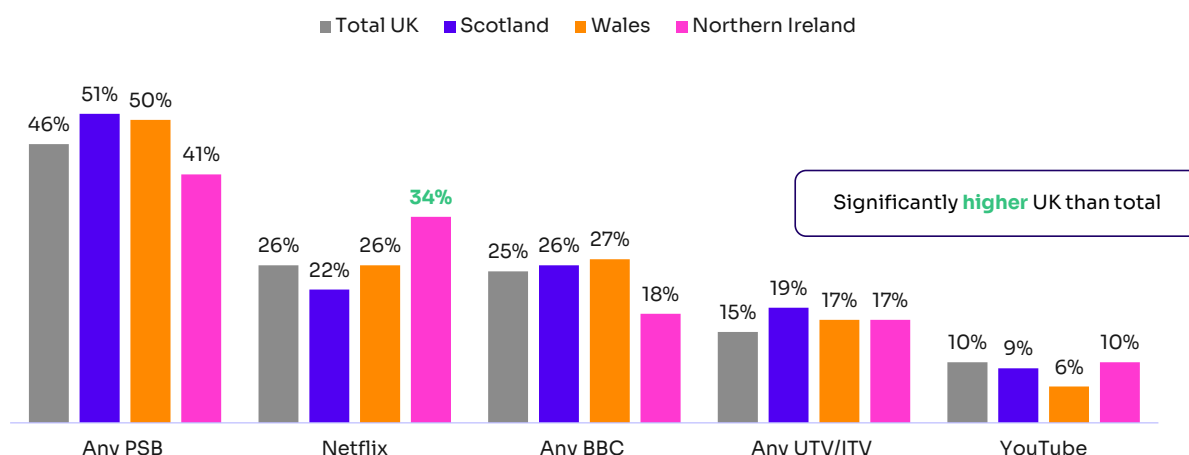
Rank	Title	Genre	Broadcaster /Service	Episode	Audience (000s)
1	KPop Demon Hunters	Films	Netflix	Film (2025)	616
2	Blue Lights	Drama	BBC	Series 3, Episode 1	508
3	Ms. Rachel	Children	Netflix	Series 1, Episode 2	433
4	Adolescence	Drama	Netflix	Series 1, Episode 2	412
5	The 1% Club	Entertainment	ITV/UTV	Series 4, Episode 6	377
6	The Celebrity Traitors	Entertainment	BBC	Series 1, Episode 9	367
7	I'm a Celebrity... Get Me Out of Here!	Entertainment	ITV/UTV	Series 25, Episode 1	343
8	The Chase Celebrity Special	Entertainment	ITV/UTV	Series 12, Episode 9	321
9	Tarzan	Films	Disney+	Film (1999)	320
10	Harlen Coben's Missing You	Drama	Netflix	Series 1, Episode 1	310

Source: Barb as-viewed, all individuals aged 4+. TV sets only. Highest-performing episode per title based on total cumulative viewing across the whole year. The broadcaster figures include live viewing, recorded playback and BVoD. Only TV set analysis has been used because SVoD/AVoD programme figures are only available for TV sets.

Adults in Northern Ireland are more likely to say they would turn to Netflix first than any other service when thinking about what to watch

We asked respondents to tell us where they usually turn to first when they are thinking about what they want to watch. Around a third (34%) of online adults in Northern Ireland said they would turn to Netflix, followed by any BBC service (18%). Four in ten (41%) said that they would turn to a service from one of the public service broadcasters.

Figure 13: Where audiences say they turn to first when thinking about what to watch

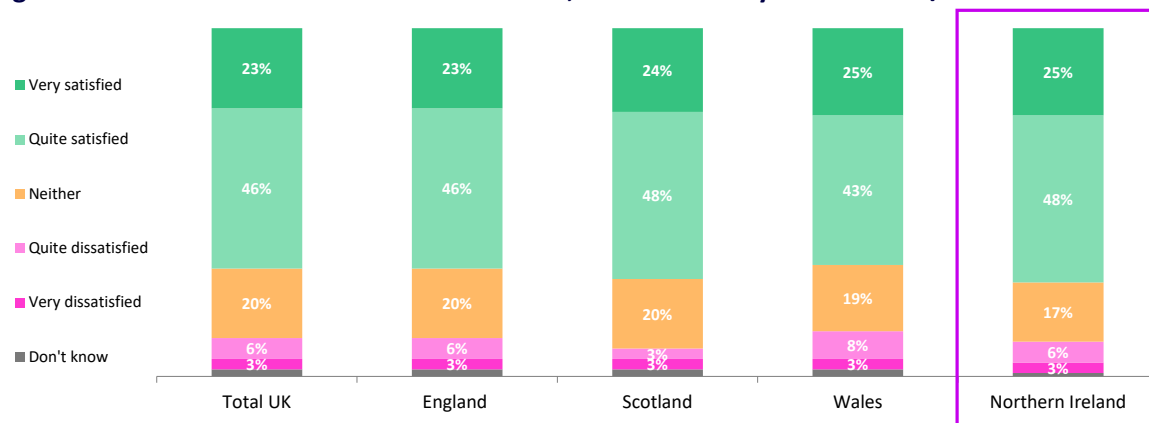


Source: Ofcom Adults' PSM Tracker 2025/6. Supplementary Survey. QA11. When thinking about what to watch, which one of these TV and video services do you usually turn to first? Base: All respondents. (3050), Scotland (281), Wales (253), Northern Ireland (260).

Audience attitudes towards PSBs and BVoDs

According to Ofcom's Adults' Public Service Media Tracker 2025/26,⁸ just under three-quarters (73%) of PSB viewers⁹ in Northern Ireland said they were satisfied with PSBs overall, with 9% saying they are dissatisfied and 17% saying they are neither satisfied nor dissatisfied. This is broadly in line with last year's findings.¹⁰ All nations are in line with the UK total.

Figure 14: Adults' satisfaction with PSBs overall, UK total and by nation: 2025/26



Source: Ofcom Adults' PSM Tracker 2025/26. Main Survey. QC15. And now, if you think about ALL the public service broadcasters combined - in other words, the BBC, ITV (ENGLAND) STV/ ITV (SCOTLAND) ITV Cymru Wales/ ITV (WALES) UTV/ ITV (NORTHERN IRELAND), Channel 4, Channel 5, and S4C... How satisfied are you that combined they provide the different areas asked about in the previous questions? Base: Those who have

⁸ In 2025, following a review of the PSM Tracker and the BBC Performance Tracker, Ofcom combined them into one survey – the new Adults' PSM Tracker. As a result of this merger, changes were made to the methodology and questionnaire. For further information, please see the [Technical Report](#) for the new tracker.

⁹ Ofcom's Adults' PSM Tracker 2025/26 defines 'PSB viewer's as all who have watched a PSB channel/service in the past six months.

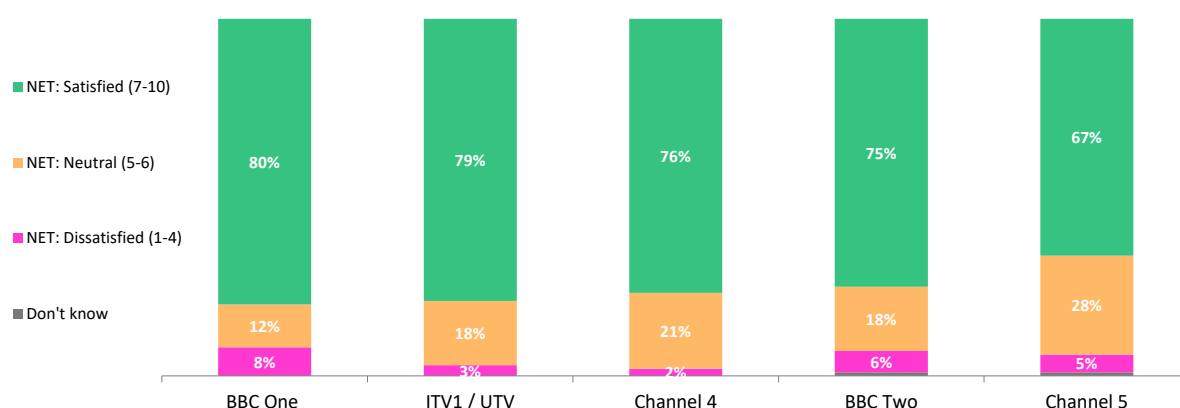
¹⁰ Trends are indicative due to changes in methodology.

watched any PSB channels or on-demand services in the last 6 months, Total UK (4684), England (2530), Scotland (450), Wales (385) and Northern Ireland (319).

When asked to consider individual PSB channels, most viewers in Northern Ireland said they were satisfied with BBC One (80%) and UTV/ITV1 (79%). Around three quarters of viewers said they were satisfied with Channel 4 (76%) or BBC Two (75%), followed by Channel 5 (67%).

Focusing on BVoD services, most viewers in Northern Ireland said they were satisfied with BBC iPlayer (83%), ITVX or ITVX Premium (81%), Channel 4 or Channel 4+ streaming (80%) or 5 streaming (79%).

Figure 15: Adult's satisfaction with individual PSBs: 2025/26



Source: Ofcom Adults' PSM Tracker 2025/26. Main Survey. Question QB1. On a scale of 1 to 10, where 1 means extremely dissatisfied and 10 means extremely satisfied, overall how satisfied or dissatisfied are you with these TV channels? Base: Those who have watched [broadcaster] in the last 6 months: BBC One (257), ITV1/UTV (211), Channel 4 (197), BBC Two (147) or Channel 5 (153).

Ofcom's Children's PSM Tracker 2025/26 asked children aged 8-16 and the parents/guardians of younger children (aged 3-7) answering on their child's behalf.¹¹ We found that among children in Northern Ireland who watch PSB TV channels, over half said they 'like' BBC TV channels (56%) and ITV TV channels (including UTV) (53%). Just under half (48%) said they like Channel 4 TV channels while around two-fifths (41%) said they like Channel 5 TV channels.

When looking at individual BVoD services just over six in ten (62%) children said they like BBC iPlayer, over half (54%) said they like ITVX and just under half (49%) said they like Channel 4's streaming service. Just over a third (35%) of children said they like Channel 5's streaming service.

Trusted and accurate UK news is considered the most important element of PSB in Northern Ireland

The Adults' PSM Tracker asked all respondents to consider what they considered to be the top three most important features for PSBs to deliver to society overall. Just under half (48%) of adults in Northern Ireland ranked 'trusted and accurate news' in their top three, followed by 'a wide range of different types of programmes and content' (43%) and 'high quality and creative programmes and content' (42%).

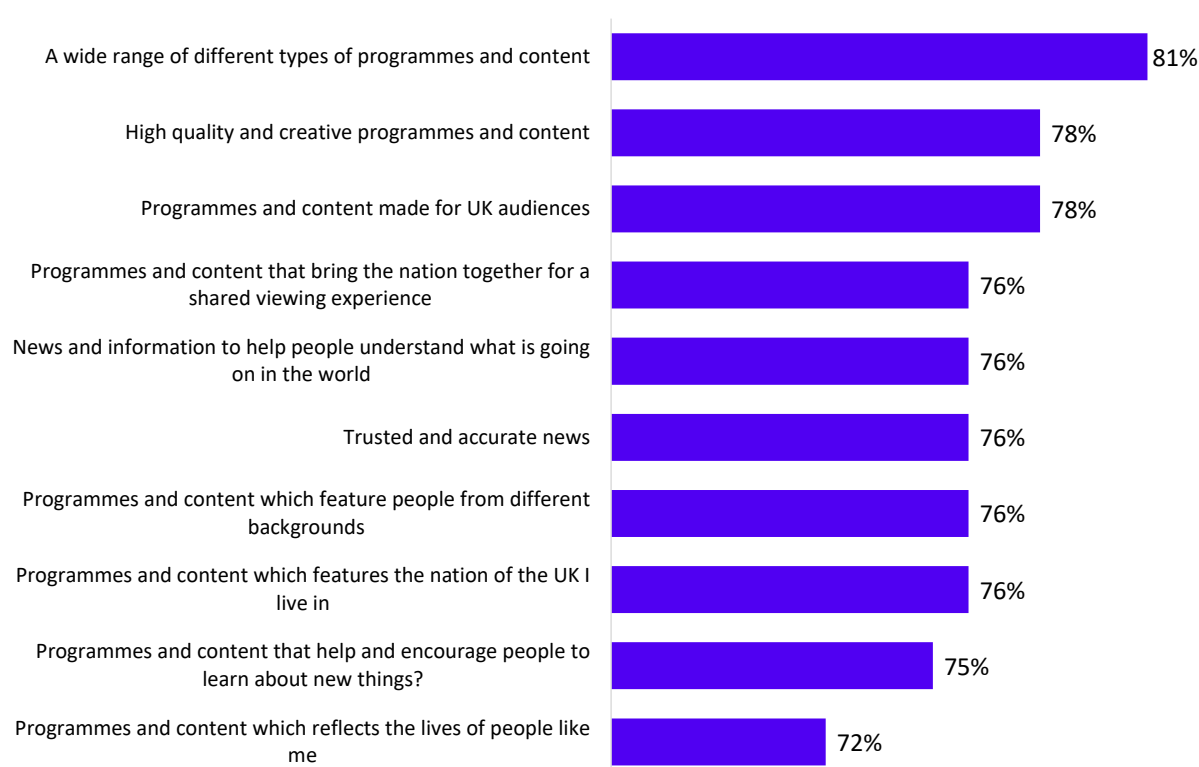
¹¹ The sample for Ofcom's Children's PSM Tracker is children aged 3-16. For children aged 3-7 their parents/guardians answer the questions on their behalf while children aged 8-16 answer the questions themselves. Where we discuss the responses of children aged 3-16 throughout this report, we are referring to the answers of both the older children themselves (8+) and the parents/guardians of younger children (3-7).

These findings are broadly similar to the responses in the previous iteration of the PSM Tracker in 2023, where ‘a wide range of different types of programmes, such as drama, comedy, entertainment or sport’ and ‘trusted and accurate UK news’ featured in the top three elements of PSBs in Northern Ireland.¹²

For viewers in Northern Ireland, PSBs are seen to deliver a wide range of different types of programmes and content well

In terms of performance, PSBs overall are seen to deliver ‘a wide range of different types of programmes and content’ (81%), ‘high quality and creative programmes and content’ (78%) and ‘programmes and content made for UK audiences’ (78%) well¹³ by PSB viewers in Northern Ireland. When looking at PSB attributes relating to representation and the local area, over three-quarters (76%) of viewers in Northern Ireland said that PSBs delivered ‘programmes and content which features the nation of the UK I live in’ well.

Figure 16: Delivery of PSB features among adult PSB viewers: 2025/26



Source: Ofcom Adults’ PSM Tracker. Main Survey. QC13. Thinking about public service broadcasters combined - so the BBC, ITV (ENGLAND) STV/ ITV (SCOTLAND) ITV Cymru Wales/ ITV (WALES) UTV/ ITV (NORTHERN IRELAND), Channel 4, Channel 5, and S4C... How well or badly do the public service broadcasters combined provide... Base: Those who have watched any PSB channels or on-demand services in the last 6 months in Northern Ireland (319). Net rating 7-10.

¹² Please note, the statements for this question changed slightly in 2025/26. Trends are indicative only due to changes to methodology.

¹³ Ofcom’s Adults’ PSM Tracker uses questions asking respondents to say how ‘well’ or ‘badly’ different attributes are being provided, using a 1-10 scale where 1 means extremely badly and 10 means extremely well. When referring to ‘well’ throughout this report, it is a NET of scores 7 to 10.

When looking at the delivery of different features of content by individual PSBs, for both their TV channels and streaming services combined,¹⁴ around four in five viewers in Northern Ireland rated BBC TV, UTV/ITV and Channel 4 highly for ‘programmes and content made for UK audiences’, ‘high quality and creative programmes and content’ and ‘news and information to help people understand what is going on in the world’.

Figure 17: Perceptions of PSBs (TV channels and BVoD) among adults in Northern Ireland: 2025/26

	BBC TV	UTV/ITV	CHANNEL 4	CHANNEL 5
Programmes and content made for UK audiences	79%	81%	77%	73%
A wide range of different types of programmes and content	79%	81%	76%	70%
High quality and creative programmes and content	79%	81%	82%	66%
News and information to help people understand what is going on in the world	78%	79%	78%	65%
Programmes and content which features the nation of the UK I live in	78%	74%	71%	64%
Programmes and content which feature people from different backgrounds	76%	77%	79%	67%
Programmes and content that bring the nation together for a shared viewing experience	76%	77%	73%	64%
Trusted and accurate news	72%	77%	76%	69%
Programmes and content which reflect the lives of people like me	71%	71%	70%	61%
Programmes and content that help and encourage people to learn about new things	78%	69%	77%	60%

Source: Ofcom Adult’s PSM Tracker 2025/26. Main Survey. Question NC1-6. Thinking of [broadcaster] overall... How well or badly does [broadcaster] provide... Base: Those in Northern Ireland who have watched ... in last six months: BBC TV (292), ITV/UTV (269), Channel 4 (207) and Channel 5 (160).

According to Ofcom’s Children’s PSM Tracker, most PSB viewers aged 3-16 in Northern Ireland agreed that, overall, they are delivering across different features. This includes around seven in ten saying that PSBs provide ‘programmes and content that helps them learn’ (71%) and ‘high quality programmes they enjoy’ (70%). There are however differences when we look at children’s perceptions of individual PSBs, with the BBC tending to be the highest rated across the different features.

¹⁴ When asking respondents to rate PSBs for each feature, we ask them to think about their TV channels and BVoD service combined (e.g. BBC TV channel and BBC iPlayer). In previous iterations of the PSM Tracker, respondents rated PSB TV channels separately to their BVoD service, so each PSB effectively had two different ratings for each feature. The change in the format of this question, alongside the methodology changes, means that time series data is not available, even indicatively.

Figure 18: Perceptions of PSBs (TV channels and BVoD) among children in Northern Ireland: 2025/26

	BBC TV	UTV/ITV	CHANNEL 4	CHANNEL 5
Programmes and content made for UK audiences	79%	81%	77%	73%
A wide range of different types of programmes and content	79%	81%	76%	70%
High quality and creative programmes and content	79%	81%	82%	66%
News and information to help people understand what is going on in the world	78%	79%	78%	65%
Programmes and content which feature the nation of the UK I live in	78%	74%	71%	64%
Programmes and content which feature people from different backgrounds	76%	77%	79%	67%
Programmes and content that bring the nation together for a shared viewing experience	76%	77%	73%	64%
Trusted and accurate news	72%	77%	76%	69%
Programmes and content which reflect the lives of people like me	71%	71%	70%	61%
Programmes and content that help and encourage people to learn about new things	78%	69%	77%	60%

Source: Ofcom Children's Public Service Media Tracker 2025/26. Question C8a-d. Now thinking just about [PSB NAME], how much do you agree or disagree it provides the following things for your child/ for you? Base: Users of each service in Northern Ireland. BBC (322), ITV/ UTV (286), Channel 4 (258), Channel 5 (249).

Satisfaction with SVoD and VSPs

Viewers in Northern Ireland are highly satisfied with SVoD services and VSPs

Ofcom's Adults' PSM Tracker shows that levels of satisfaction with SVoD services are high. Among those who use each service, a vast majority of viewers in Northern Ireland said they were satisfied with NOW (92%) and Netflix (91%). Over four in five said they were satisfied with Amazon Prime Video (86%) and Disney+ (82%).

The Children's PSM Tracker found that over nine in ten children in Northern Ireland (aged 3-16) who watch each service said they 'like' Netflix (95%) and Disney+ (93%) followed by four in five (80%) who said they like Amazon Prime Video. Around seven in ten (69%) said they like Sky On Demand or Sky Go or Sky Kids, followed by just over two-thirds who said they like Apple TV+. Around six in ten (63%) said they like Paramount+ and NOW (59%).

In addition, we showed adults a range of features that PSBs are typically associated with and asked them to select which broadcasters and services they thought each description applied to. Respondents were able to choose as many broadcasters and services as they liked for each description. The BBC featured in the top three across most descriptions. The BBC is ranked first in

Northern Ireland for ‘offer[ing] a range of points of view’ (47%)¹⁵ and ‘offer[ing] a different point of view from my own’ (40%).¹⁶ Netflix is also associated with a majority of descriptions including ‘offer[ing] a wide range of different types of content’ (64%) and ‘high quality’ (61%).

Figure 19: Proportion of online adults in Northern Ireland associating a particular service with the content descriptions

Statement	BBC	UTV /ITV	Channel 4	Channel 5	Netflix	YouTube	Amazon Prime Video	NOW	Disney+
High quality	48%	44%	34%	22%	61%	33%	42%	12%	39%
Offers creative content	43%	33%	38%	22%	49%	44%	32%	12%	24%
Innovative (introduces new ideas, programmes or formats)	38%	29%	31%	24%	43%	30%	27%	7%	18%
Offers a different point of view from my own	40%	27%	25%	17%	17%	23%	12%	6%	10%
Offers a range of points of view	47%	38%	33%	20%	23%	29%	14%	3%	9%
Is impartial (not favouring one side over another)	36%	32%	26%	18%	33%	23%	22%	8%	16%
Content that is relevant to me	45%	44%	34%	21%	54%	41%	36%	9%	25%
Takes risks with content	24%	18%	31%	19%	30%	24%	17%	5%	7%
Offers a wide range of different types of content	44%	42%	37%	27%	64%	46%	51%	15%	29%
Offers something unique that I can't find elsewhere	24%	18%	18%	13%	46%	31%	27%	7%	23%
Trustworthy	43%	38%	35%	21%	42%	26%	26%	9%	22%
Inspires me to try new activities, hobbies or interests	24%	16%	17%	10%	19%	36%	11%	3%	10%

Source: Ofcom Adults' PSM Tracker 2025/26. Supplementary Survey. Question C1A. For each description, please select the logos of the broadcasters and services that you think each description applies to. Base size: All respondents in Northern Ireland (260).

First place

Second place

Third place

The PSM Tracker also asked adults to choose the broadcasters or streaming services they thought best provided different types of content. In Northern Ireland, the BBC was most likely to be selected for nearly all the genres we asked about, similar to other nations and the UK overall. Over three-quarters (78%) of adults in Northern Ireland selected the BBC for ‘news’, followed by UTV/ITV (54%) and Channel 4 (43%). Around seven in ten selected the BBC for ‘British drama’ (72%)¹⁷ and ‘current

¹⁵ Followed by UTV/ITV (38%) and Channel 4 (33%).

¹⁶ Followed by UTV/ITV (27%) and Channel 4 (25%).

¹⁷ Followed by UTV/ITV (57%) and Channel 4 (45%).

affairs programmes’ (69%).¹⁸ PSBs performed well in this question for most of the genres we ask about, although Netflix, Amazon Prime Video and Disney+ were most likely to be selected for ‘USA comedy’ and ‘USA drama’ content for viewers in both Northern Ireland and the wider UK.

Figure 20: Proportion of online adults in Northern Ireland associating a particular service with each genre

Genre	BBC	UTV /ITV	Channel 4	Netflix	Channel 5	YouTube	Amazon Prime Video	NOW	Disney+
News	78%	54%	43%	4%	32%	11%	3%	2%	2%
British drama	72%	57%	45%	21%	29%	9%	15%	8%	6%
Current affairs programmes	69%	45%	40%	7%	20%	9%	4%	4%	3%
Documentaries	67%	35%	43%	33%	24%	19%	20%	6%	9%
British comedy	64%	44%	36%	19%	20%	12%	11%	8%	5%
Live sport	63%	47%	16%	12%	9%	10%	23%	9%	4%
Science & nature	61%	25%	27%	15%	15%	22%	13%	8%	8%
Children’s programmes	56%	27%	15%	34%	14%	25%	19%	7%	53%
Quizzes/ game shows	55%	62%	32%	11%	16%	10%	7%	5%	4%
Arts & music	49%	19%	27%	14%	14%	30%	11%	5%	6%
Religion	44%	15%	13%	7%	7%	12%	6%	1%	4%
USA drama	16%	12%	20%	55%	25%	13%	42%	16%	31%
USA comedy	12%	11%	22%	48%	23%	17%	29%	8%	25%

Source: Ofcom Adults’ PSM Tracker 2025/26. Supplementary Survey. Question C1A. For each type of programme, please select the logos of the broadcasters or services you think best provide that type of content. Please select as many or as few as you think that description applies to, or none. Base size: All respondents in Northern Ireland (260).

First place

Second place

Third place

According to Ofcom’s Adults’ PSM Tracker 2025/26, a majority (92%) of viewers of YouTube in Northern Ireland¹⁹ say they are satisfied with the service, in line with the UK average. Similarly, Ofcom’s Children’s PSM Tracker found that 93% of children in Northern Ireland who use YouTube (including YouTube Kids) say they like the service.²⁰

¹⁸ Followed by UTV/ITV (45%) and Channel 4 (40%)

¹⁹ Viewers in the last six months.

²⁰ Due to low sample sizes demographic analysis is not available for Northern Ireland.

TV and video content for and from Northern Ireland

How we report spend on programming

The analysis in this section covers programming made in Northern Ireland for viewers in Northern Ireland, as well as programming made in the nation and broadcast UK-wide. It focuses on first-run UK originations, which are programmes commissioned by or for a licensed public service channel with a view to their first showing on television in the UK in the reference year. Spend on this content includes all costs incurred by the broadcaster associated with making programmes. These include both direct and indirect production costs for in-house productions and licensing costs for commissioned programmes, but exclude costs related to marketing and distribution.

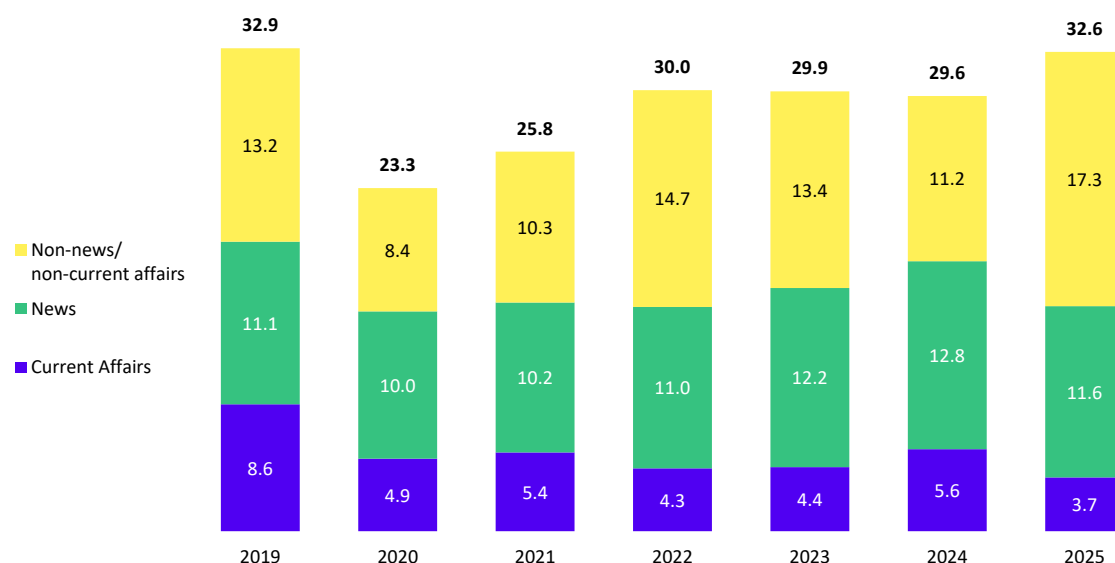
How we present financial data

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

Increases in PSB first-run spending for Northern Ireland are driven by non-news/non-current affairs

PSB spend on non-news/non-current affairs programming for Northern Ireland rose by £6.1m (53.9%) to £17.3m in 2025. This represented 53% of the total £32.6m spend on first-run UK-originated content for Northern Ireland – the first time since 2013 that such programming has accounted for over half of first-run spend. The increase in non-news/non-current affairs spending was driven by higher sports coverage and increased factual programming (see below). In contrast, news spend fell by 8.9% to £11.6m. Current affairs had the largest proportional decline, with first-run spend dropping by 34.4% year-on-year (£1.9m) to £3.7m.

Figure 21: PSB spend (£m) on first-run UK-originated content for Northern Ireland, by genre: 2019-2025



Source: Ofcom/broadcasters.

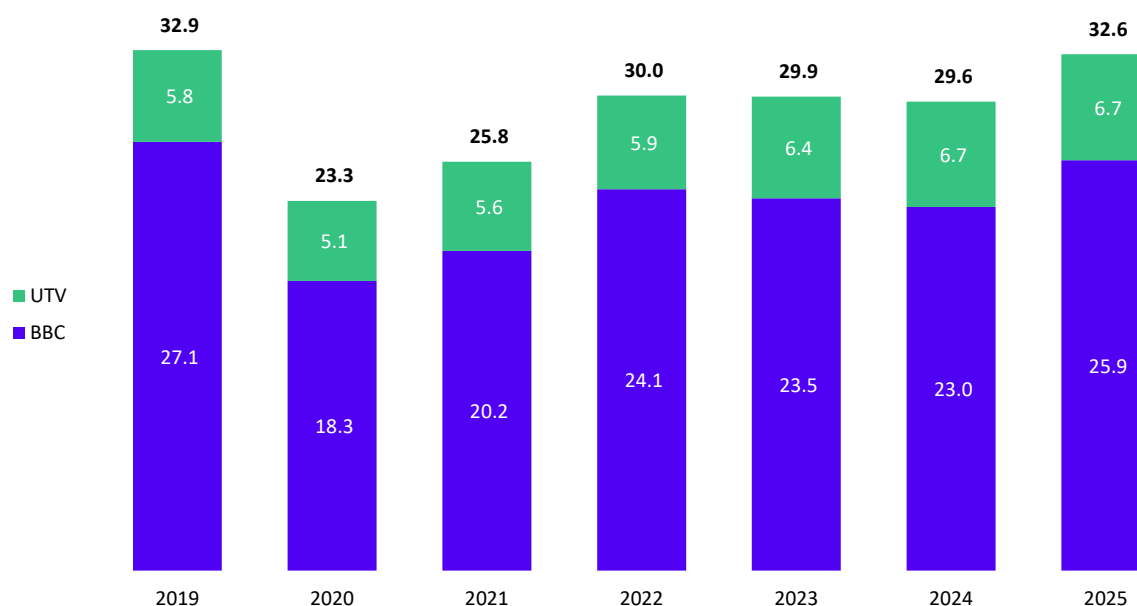
The BBC led increases in PSB spend on non-news/non-current affairs

The BBC remains the largest contributor to first-run spending in Northern Ireland, with its investment rising by 12.9% (£3.0m) to £25.9m in 2025.²¹ This growth was driven primarily by increased spending on non-news and non-current affairs programming. However, BBC spending on both news and current affairs declined.

UTV's first-run spending remained broadly stable at £6.7m in 2025, unchanged since the previous year, as higher investment in news was offset by reduced spending on current affairs and other programming.

²¹ This may include some co-commissions between BBC network and non-network services. Since 2022, if such programmes were broadcast on regional opt-outs first, the spend has been captured as part of the BBC's regional programming spend.

Figure 22: BBC and UTV spend (£m) on non-network first-run UK-originated content for Northern Ireland: 2019-2025



Source: Ofcom/broadcasters.

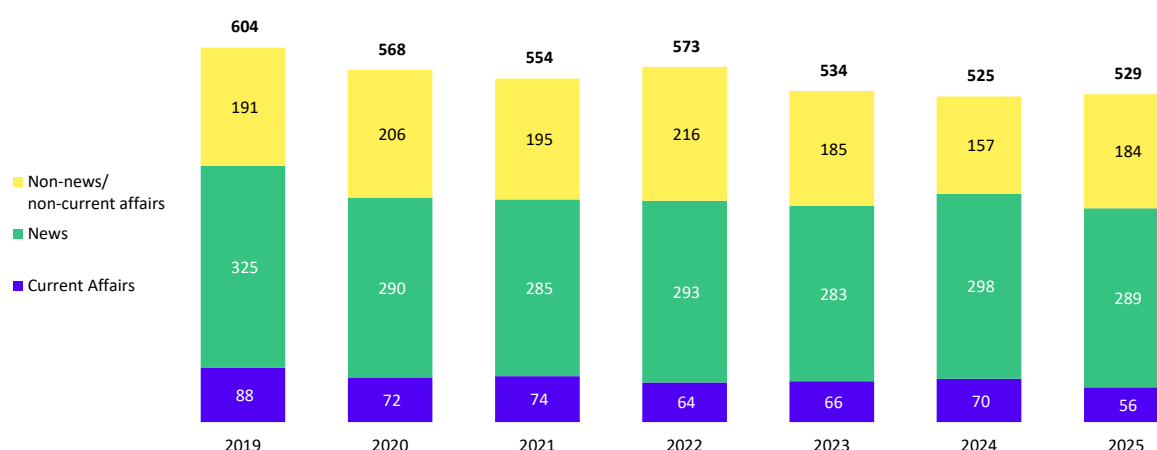
BBC hours of first-run content in Northern Ireland rose despite lower news and current affairs output

The slight (0.8%) increase in total hours was driven by growth in non-news and non-current affairs programming, which rose by 27 hours (17.2%) to 184 hours. This was in part because of increased sports coverage, with output up 19 hours year-on-year (27%), including titles such as *Northern Ireland International Football*, *All Ireland Hurling*, *UEFA Nations League* and *Women's Six Nations*. Specialist factual programming also increased significantly from 22 hours in 2024 to 43 hours in 2025, including documentaries such as *Anna Haugh's Big Irish Food Tour* and *Kinahan: The True Story of Ireland's Mafia*.

Despite this increased output of non-news and non-current affairs programming, news continues to account for the largest share of the BBC's output in Northern Ireland, representing 55% of first-run hours.

First-run hours for both news and current affairs declined in 2025; by 3% (9 hours) and 20% (14 hours), respectively. This reflects higher levels of coverage in the previous year due to the UK and Irish general elections. There were also fewer hours of specific current affairs programmes in 2025, including *Nolan Live*, *Spotlight*, *Sunday Politics* and *The View*. In addition, *Spotlight Investigation* and *Stormont Special*, both of which aired in 2024, did not return in 2025.

Figure 23: BBC hours of first-run UK-originated content for Northern Ireland, by genre: 2019-2025

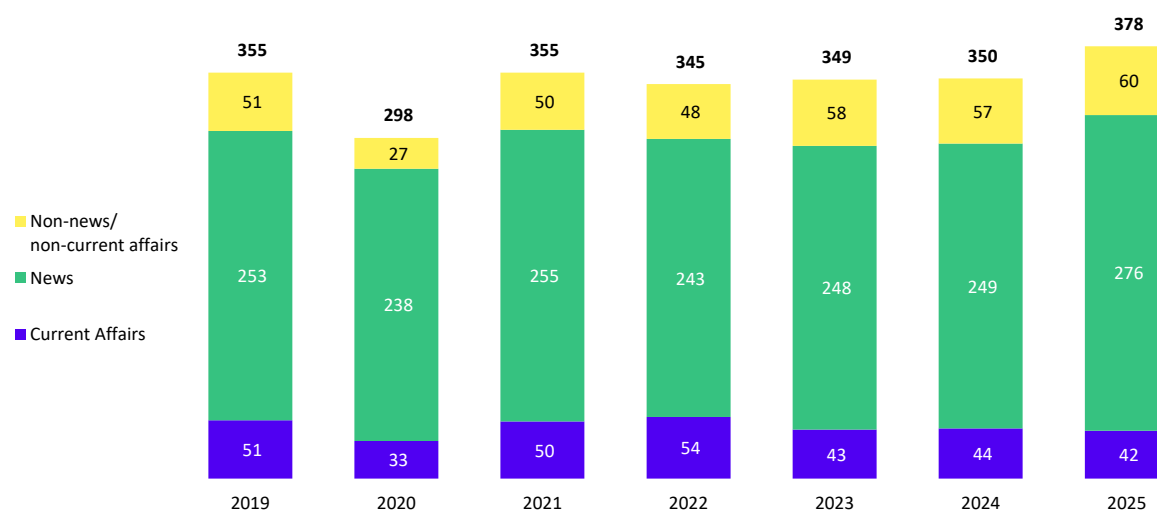


Source: Ofcom/broadcasters.

UTV broadcast 378 hours of first-run content for Northern Ireland in 2025

News programming accounted for 73% (276 hours) of UTV's first-run output in 2025. Current affairs represented 11% of output (42 hours), while non-news and non-current affairs programming made up 16% (60 hours). The balance of output across these categories has remained broadly stable over recent years, with news consistently accounting for the majority of first-run programming. Due to a methodological change introduced this year, UTV's 2025 output is not directly comparable with previous years.

Figure 24: UTV hours of first-run UK-originated content for Northern Ireland, by genre: 2019-2025



Source: Ofcom/broadcasters. As of 2025 there were adjustments in ITV methodology for calculating nations and regions output. As a result, 2025 data is not directly comparable to previous years.

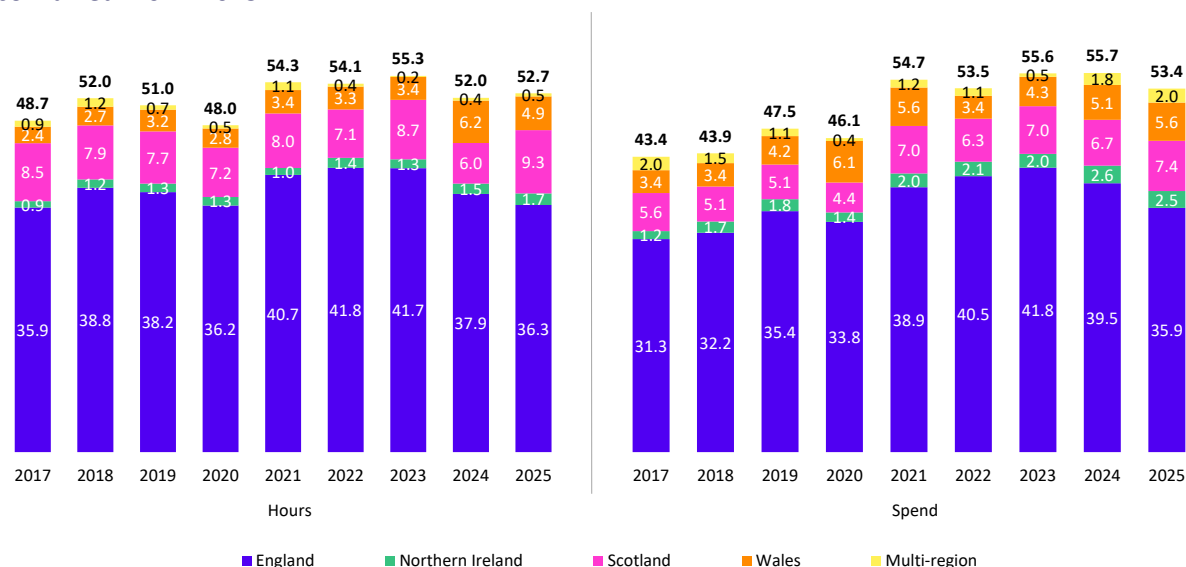
Network content produced in Northern Ireland

Some public service broadcasters are required to make programmes in a range of places around the UK for broadcast on their network TV channels. The broadcasters have quotas relating to the proportion of qualifying hours and the proportion of qualifying spend that must be attributable to

outside London.²² 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 in 2025, 2.5% of qualifying first-run network spend and 1.7% hours were allocated to programmes qualifying as Northern Ireland productions, lower than for the other nations. The proportion of hours and spend allocated to Northern Ireland have both held relatively steady over recent years.

Figure 25: Proportion (%) of qualifying network hours and spend outside London, all PSBs combined: 2017-2025



Source: Ofcom/broadcasters.

Drama investment in Northern Ireland by Channel 4 and Channel 5 offset declines in spend by BBC and ITV

The proportion of network spend from the BBC, which allocates the largest share of qualifying network content to Northern Ireland, fell from 4.0% to 3.2% in 2025. This was due to fewer BBC dramas qualifying as being made in Northern Ireland airing in 2025 – although returning dramas *Blue Lights* and *Hope Street* continued to contribute. The reduction in drama hours was offset by an increase in sports output allocated to Northern Ireland from Northern Ireland International Football.²³ This ensured that the BBC qualifying hours increased slightly to 3.2%, up from 3.1% in 2024.²⁴

Channel 4 increased both its spend and hours allocated to Northern Ireland year on year, with spend rising to 1.7% (from 0.2% in 2024) and qualifying hours increasing to 1.0% (from 0.2%). This was driven by drama series *Trespases* and returning factual series *Britain's Most Expensive Houses* (produced by Belfast-based Waddell Media).

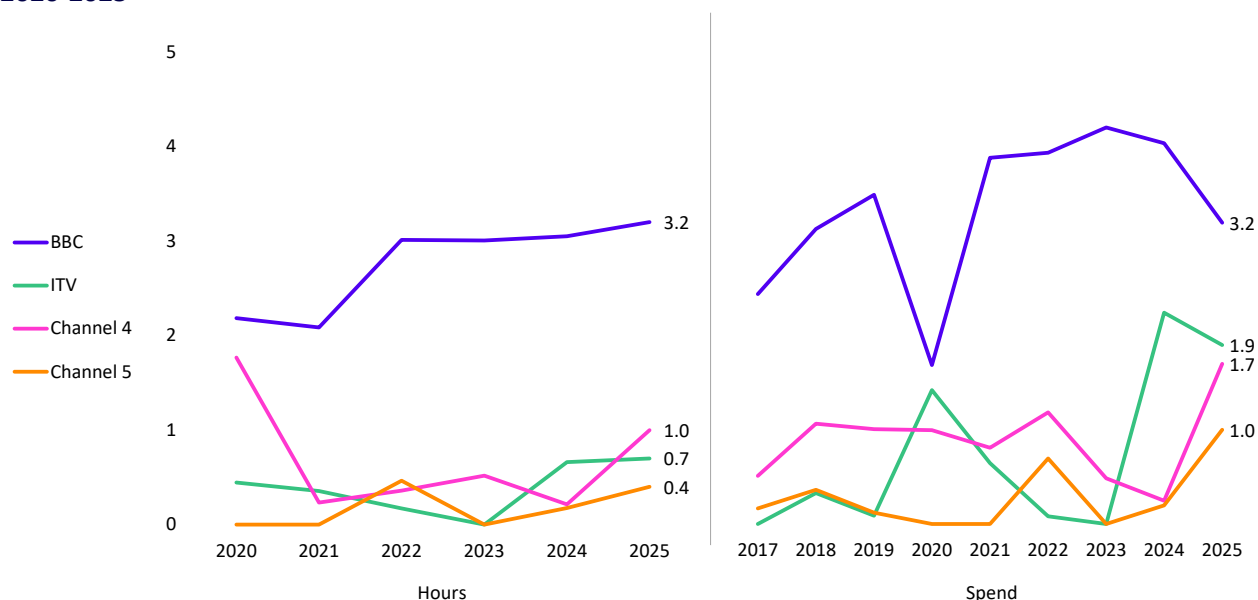
²² Qualifying' hours and spend refer to the total output and investment considered towards quotas. In the case of regional production quotas, this refers to first-run UK-originated programming, excluding news programming, acquisitions and self-promotional content.

²³ This was a co-commission between BBC Northern Ireland and the BBC network.

²⁴ The BBC's network production quota for Northern Ireland is 3% for both production spend and network hours.

Meanwhile, quiz show *Who Wants to be a Millionaire?* (Stellify Media) continued to qualify as a Northern Ireland production for ITV, along with the returning drama *Malpractice*. Drama also drove Channel 5's increase in spend, via the introduction of mystery series *Murder Most Puzzling*, which qualified as made in Northern Ireland for our spend and off-screen talent criteria.

Figure 26: Proportion (%) of qualifying network production allocated to Northern Ireland, by PSB: 2020-2025



Source: Ofcom/broadcasters.

The Irish Language Broadcast Fund provided £3.68m in content funding in 2025-26

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

Of the 2025/26 funding, around four-fifths came from the UK Government's Department for Culture, Media & Sport, through the British Film Institute, with the remainder coming from the Irish Government's Department of Tourism, Culture, Gaeltacht, Arts, Sports and Media via Northern Ireland Screen, which manages the fund.

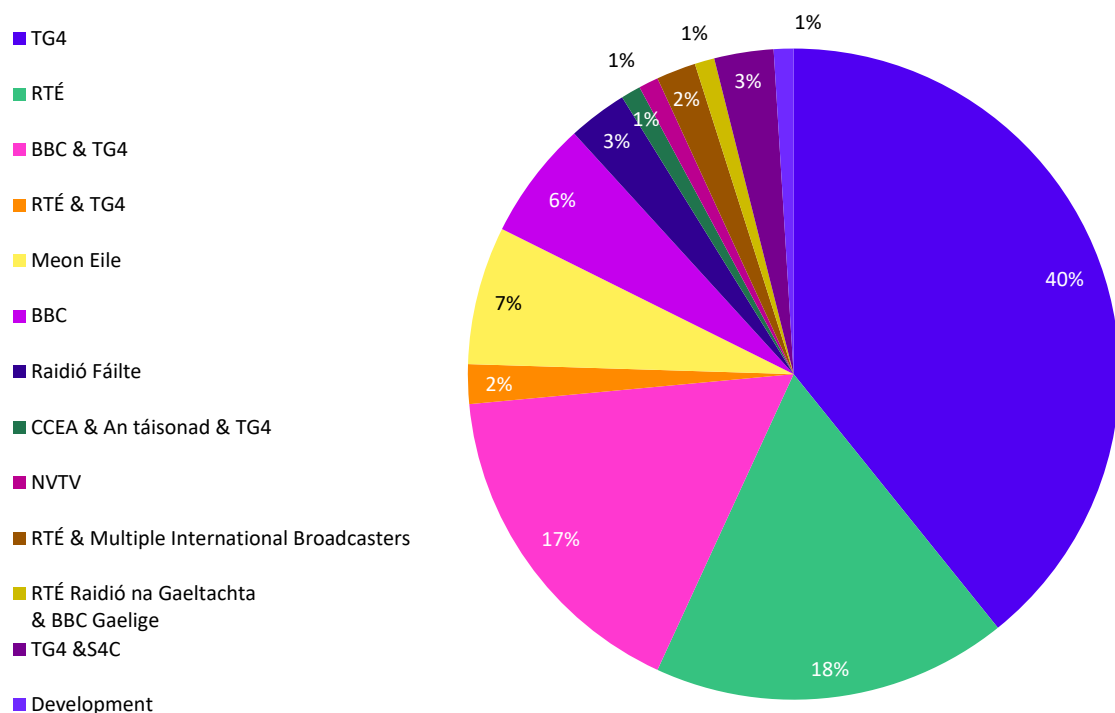
The ILBF continued to fund a broad range of Irish language content in 2025/26, for broadcast primarily on TG4, BBC Northern Ireland and RTÉ. The fund also supported a range of digital, educational and audio content.

Recent programming highlights include Strident Media's *Croí na Féile*, a factual entertainment series for TG4 which follows Hugh Carr as he volunteers at various Irish festivals; *Slán Go Feoil* (Ronin Films), a two-part documentary that follows four carnivores as they try to refrain from eating meat for a month, aired on RTÉ 1 and Clean Slate's *Tubaiste sa Phortach*, which aired on BBC NI, traces the history surrounding an RAF plane crash in Donegal during WW II. Below the Radar's *Breith, Beatha, Bás*, a docuseries that follows a community of celebrants as they help ordinary people all over Ireland celebrate and mark some of the most emotionally charged moments in their lives, will also air on RTÉ.

Other notable commissions include the second series of *Crá* (Fíbin Films) and production funding for Village Films' feature-length drama, *Abhaile*, which will air on TG4 & BBC NI following a festival window. *Mac Liammóir* is a docudrama from Dearcán Media which will examine the life of the dramatist and actor Mícheál Mac Liammóir (TG4).

Funding was awarded for a number of documentaries including *Fuath Ban* for TG4 and *Triskelion: A Celtic Identity* for RTÉ (both produced by Dearcán Media). *Camp Aida* is being produced by Finepoint Films for TG4 and Below the Radar will produce *Gearóid Ó Cairealláin: Ná hAbair é, déan é*, which tells the story of Gearóid's contribution to the Irish language scene in west Belfast, for TG4 and BBC Northern Ireland.

Figure 27: Irish Language Broadcast Fund recipients: 2025-2026



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 £1.2m in funding in 2025/26

The Ulster-Scots Broadcast Fund (USBF) was established in 2011 to provide finance for the production of film, television, radio and digital productions on Ulster-Scots heritage, culture and language in Northern Ireland.

The USBF funding, amounting to £1.1m, comes from the UK Department for Culture, Media & Sport through the British Film Institute to Northern Ireland Screen, which manages the fund.

Fourteen projects received funding from the Ulster-Scots Broadcast Fund (USBF) in 2025-26. These included nine television productions, one year of NVTV content on Northern Visions' That's TV broadcaster, three digital projects and one television development project.

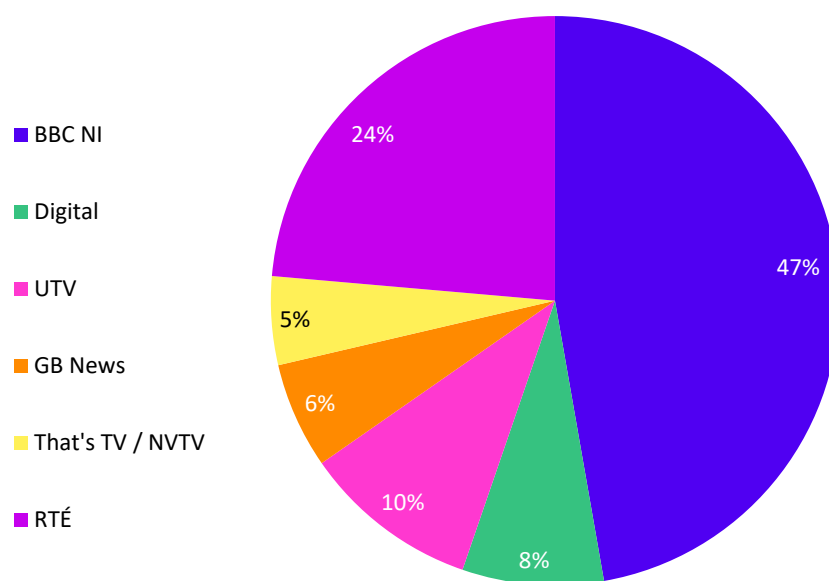
USBF-funded content over the period included documentary, factual entertainment and interactive content. Commissioned highlights include TV and digital additions to the USBF USA 250 slate reflecting the 250th anniversary of US Independence in 2026. TV productions include BBC NI two-part documentary *Declaration*, GB News documentaries *Architects of America - Revolution to Republic*

(ep 3) and *Whiskey and The West* (ep 4) and *Mahon's Way* series 6, with a US theme for UTV. USA 250 digital content includes Makematic's *Essential State History* and the Nerve Centre's *America's Ulster Story* – both aimed at local and US audiences.

Additional TV highlights include RTÉ documentaries *The Lion, The Witch and the Ulsterman*, about the Ulster-Scots roots of CS Lewis, and *Dr Marie Cassidy Investigates The Witch Trial of Islandmagee*. BBC NI documentary *How Sweet the Sound* sees singer-songwriter Rhiannon Giddens trace the Ulster-Scots roots of American music. The USBF has also funded the return of popular BBC NI cookery series *Paula McIntyre's Hamely Kitchen*.

Development funding was awarded to BBC Northern Ireland's *Ettlin' fur Godot* - an Ulster-Scots translation and performance of Samuel Beckett's *Waiting for Godot*.

Figure 28: Ulster-Scots Broadcast Fund recipients: 2025/26



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

Market Developments

More choice for local radio listeners

Ofcom has licensed another four small-scale DAB radio multiplexes for Northern Ireland since the start of 2026, bringing the total awarded to 10. New licences were awarded for Armagh, Ballymena, Cookstown and Dungannon, and Coleraine.

Three licences - Enniskillen, Portadown and Craigavon, and Ards Peninsula - were awarded last year. These join three multiplexes that were awarded earlier and which are already on air – Derry / Londonderry, Belfast and Lisburn, and Newry.

DAB multiplexes are the transmission infrastructure over which digital radio services are broadcast. Typically, each multiplex has the potential to carry more than 20 stations, greatly enhancing the choice available in those areas. Small-scale DAB multiplexes offer smaller stations a low-cost path to broadcasting on a digital platform.

On the Belfast and Lisburn multiplex, there are a range of stations including digital versions of analogue community stations like Belfast 89, as well as a DAB version of Radio Lisburn Live, a station which had previously only been available online.

Downtown Radio marks 50 years of broadcasting

Downtown Radio is celebrating a major milestone this year, marking 50 years on air as one of Northern Ireland's most influential commercial broadcasters.

Launched as Northern Ireland's first independent local radio station, Downtown Radio broke new ground in a market that had previously been dominated by BBC services. Broadcasting initially from studios in Belfast, it quickly established a distinctive identity, blending music, news, sport and local conversation at a time of significant social and political change.

Its presenters became familiar voices across the region, helping to build a loyal and widespread audience and it remains a core part of Northern Ireland's distinctive radio landscape.

Bauer Media moves to new Belfast HQ at City Quays 3

In April 2026, Bauer Media Audio Northern Ireland moved to new state-of-the-art headquarters at City Quays 3 in Belfast.

The move brings together the company's portfolio of stations — including Cool FM, Downtown Radio, Downtown Country, Greatest Hits Radio Northern Ireland and Hits Radio Northern Ireland — in one location.

For almost half a century, Bauer's Northern Ireland stations broadcast from Kiltonga Industrial Estate in Newtownards, Co Down. The new headquarters has been designed as a purpose-built broadcasting hub and forms one of Bauer's four key UK bases, alongside London, Manchester and Glasgow.

The company said that the new studios will allow its brands to operate more seamlessly across multiple platforms, from traditional FM broadcasting to online streaming, apps and on-demand audio.

Radio availability and coverage

Increase in small-scale DAB coverage in Northern Ireland

National and local DAB coverage across Northern Ireland in March 2026 was at the same level as in the previous year. However, following the launch of additional small scale DAB multiplexes, SSDAB coverage increased to 39.1% of homes in Northern Ireland, an increase of three percentage points on the previous year.

Figure 29: DAB coverage (March 2026)

		BBC	Commercial			Small-scale
			Digital One	Sound Digital	Local DAB	
UK	Homes	97.4%	91.7%	82.6%	92.0%	52.7%
	Major roads	87.4%	80.2%	72.6%	76.8%	Not Measured
England	Homes	98.4%	94.8%	86.7%	93.4%	55.8%
	Major roads	94.5%	93.9%	89.8%	87.4%	Not Measured
Scotland	Homes	95.3%	81.7%	69.0%	85.4%	40.1%
	Major roads	69.1%	45.5%	33.6%	45.6%	Not Measured
Wales	Homes	92.2%	67.5%	56.9%	83.1%	31.1% ²⁵
	Major roads	78.1%	53.3%	37.7%	61.9%	Not Measured
Northern Ireland	Homes	87.3%	85.4%	56.8%	87.5%	39.1%
	Major roads	79.3%	86.9%	55.0%	87.8%	Not Measured

Source: Arqiva, BBC, Ofcom. Note: Coverage of SSDAB is measured on a homes basis only.

²⁵ The figure for small-scale DAB coverage in Wales was incorrectly reported in the Media Nations 2025 report as 35.1%. The correct figure for March 2025 is 30.7%. Although no further multiplexes launched between 1 April 2025 and 31 March 2026, there has been a slight increase in coverage in Wales from multiplexes situated in England.

Live radio listening in Northern Ireland

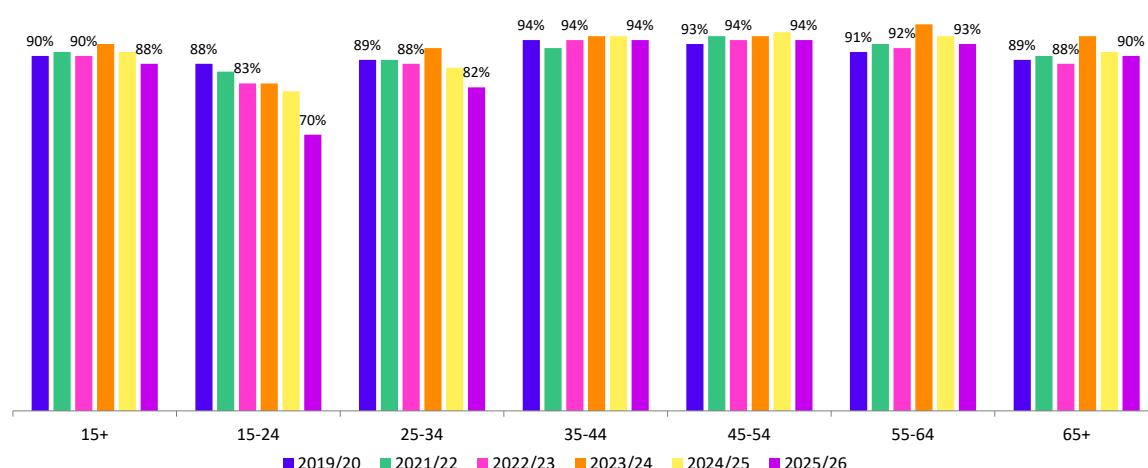
Where our data comes from

Our figures for reach of audio services come from our Audio Survey, whose participants are aged 16 and above. Figures on live radio listening come from RAJAR, which uses participants aged 15+. We have used the term 'adults' here when referring to these sources. See the [Annex](#) for more detail on data sources and methodology.

Overall radio listening

Weekly reach of radio in Northern Ireland for 2025/26 was 88% of adults, a figure which has been broadly consistent for a number of years. However, the RAJAR survey indicates a considerable decrease in the proportion of young people in Northern Ireland listening to the radio over the past few years, currently 70% compared to 88% in 2021/22. The other age groups have remained relatively stable over the same period.

Figure 30: Weekly reach of radio in Northern Ireland, by age: 2019/20 - 2025/26



Source: RAJAR; BBC Radio Ulster TSA; Q1 with 12-month weighting.

Although BBC nations' output has traditionally been very strong here compared to the equivalent stations in the other nations, there has been decrease in its market share from 20.1% to 14.3% over the past six years. In contrast, both commercial UK-wide and Northern Ireland stations have both increased their market share. Interestingly, 'other radio', which includes listening to RTÉ stations in the Republic of Ireland, has seen a decrease in market share over the past six years.

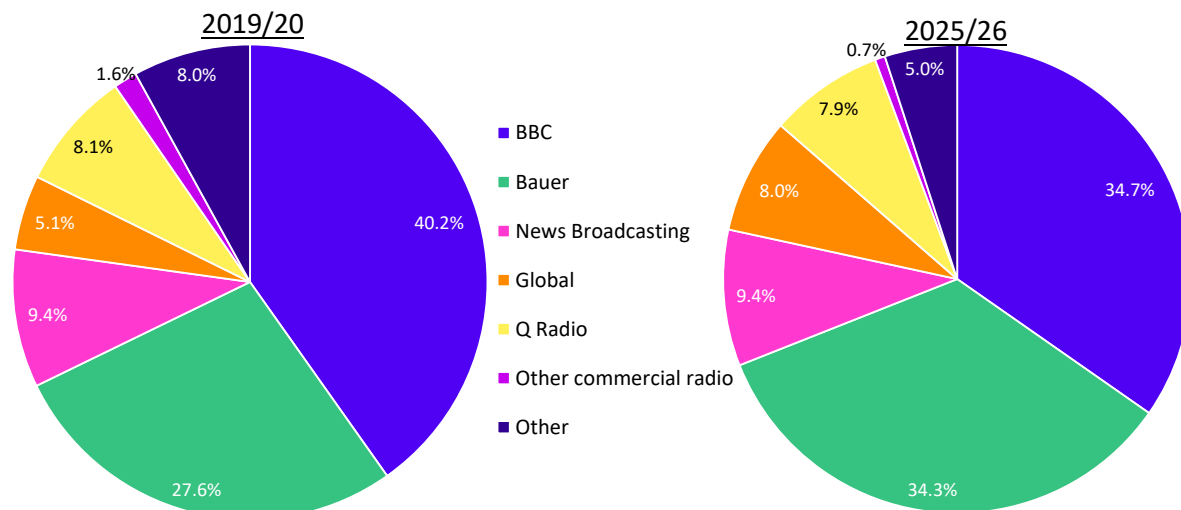
Figure 31: Share of listening in Northern Ireland, by sector: 2019/20 vs 2025/26



Source: RAJAR; BBC Radio Ulster TSA; Q1 with 12-month weighting.

Looking at how listening in Northern Ireland varies across commercial broadcaster groups, there have been notable increases for Bauer (27.6% to 34.3%) and Global (5.1% to 8.0%). The number of radio stations available has expanded listener choice by offering a range of music genres on digital platforms.

Figure 32: Share of listening by broadcaster group in Northern Ireland: 2019/20 vs 2025/26



Source: RAJAR; BBC Radio Ulster TSA; Q1 with 12-month weighting.

Looking at listening to specific radio stations, there are subtle variations depending on where people live in Northern Ireland. For those living in the Belfast area, BBC Radio 2 is the only UK-wide station to feature in the top five most-listened to stations – the others all have a more regional or local focus. Local commercial stations Cool FM and Q Radio each feature in the top five stations regardless of where people live, though Cool FM achieves a much higher share of listening within the capital compared to the rest of Northern Ireland. 'Other radio' appears in the top five for listening outside of Belfast. Ordinarily we would not highlight this in our analysis and instead focus only on individual stations (the next station would be Downtown Country at 7.2%) but it is useful to note here as it indicates likely listening to stations broadcast from within the Republic of Ireland such as RTÉ stations.

Figure 33: Top five stations in Northern Ireland, Belfast vs outside of Belfast, ranked by market share: Q1 2026

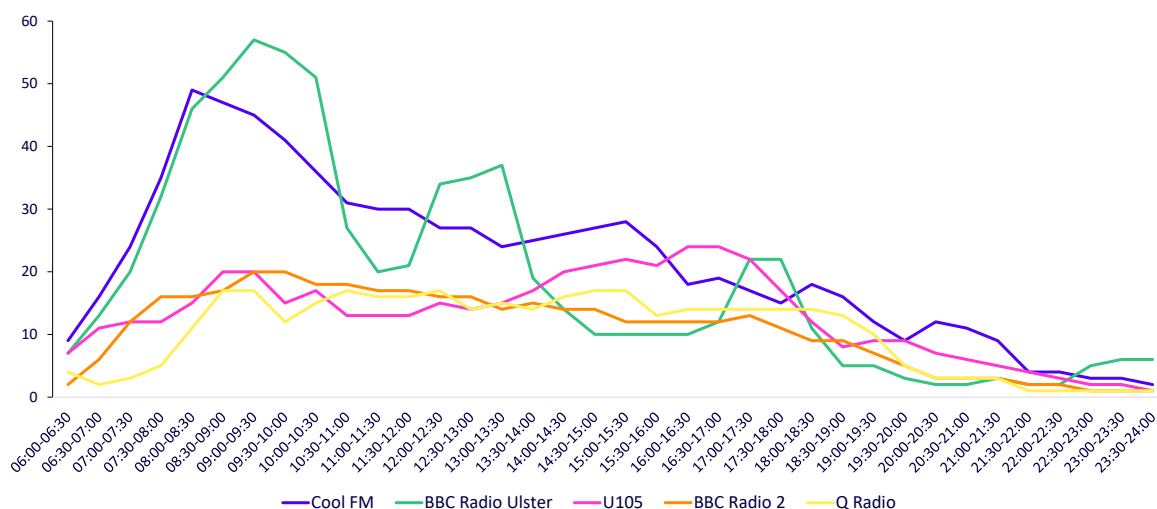
Area	Rank	Station	Market share %	Broadcaster
Within Belfast	1	Cool FM	14.4	Bauer
	2	BBC Radio Ulster	12.1	BBC
	3	U105	9.5	News Broadcasting
	4	BBC Radio 2	7.2	BBC
	5	Q Radio	7.2	Independent
Outside of Belfast	1	BBC Radio Ulster	17.1	BBC
	2	Downtown Radio	13.9	Bauer
	3	Q Radio	9.5	Independent
	4	Cool FM	8.7	Bauer
	5	Other radio	8.1	-

Source: RAJAR Q1 2026; U105 (Outside Belfast) TSA; U105 (Greater Belfast) TSA; 'Other radio' includes stations not labelled on the RAJAR survey such as stations that don't subscribe to RAJAR or are not licensed by Ofcom. In Northern Ireland this is likely to include RTÉ stations.

BBC Radio Ulster is the main station of choice on weekday mornings for those living outside of Belfast

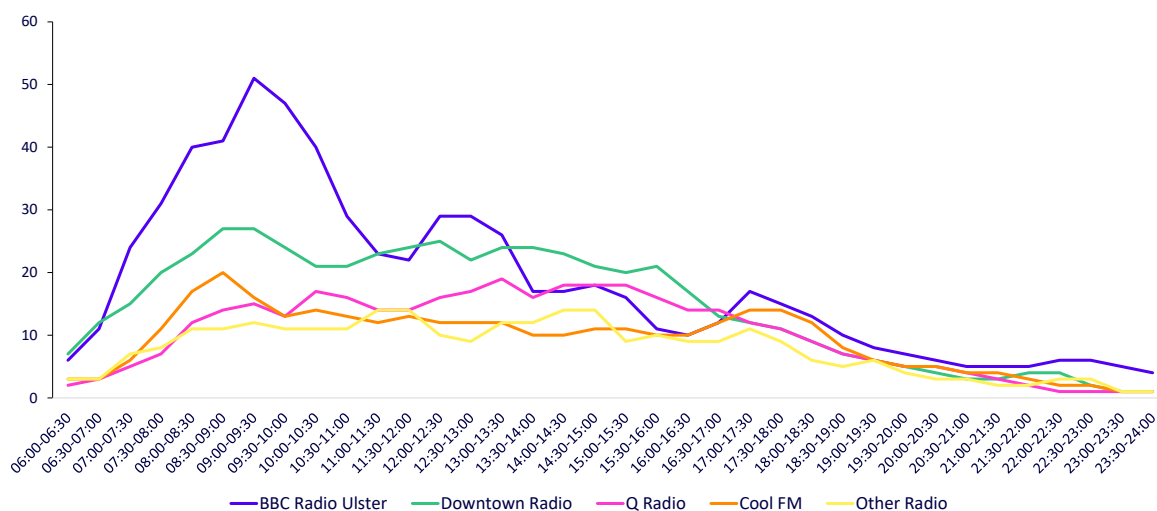
Figures 34 and 35 below show the pattern of listening to each of these top five stations across weekdays. BBC Radio Ulster is the clear leader across the mornings for those living outside of Belfast, peaking at 9-9:30am at the start of *The Nolan Show*, followed by another clear peak above other stations at midday with *Talkback* and again with *Evening Extra*, demonstrating the importance of the news programming on this station. Within Belfast, the pattern is a little different: while BBC Radio Ulster continues to have a strong presence across the day, with similar peaks as seen outside of the capital, Cool FM follows a more typical radio listening pattern with its main peak during the morning commute with *Ryan A in the Morning* and then another uplift in the late afternoon commute.

Figure 34: Average audience (000s) across the day for the top five stations in Belfast, Mon-Fri: Q1 2026



Source: RAJAR Q1 2026; U105 (Greater Belfast) TSA; six-month weighting.

Figure 35: Average audience (000s) across the day for the top five stations outside of Belfast, Mon-Fri: Q1 2026

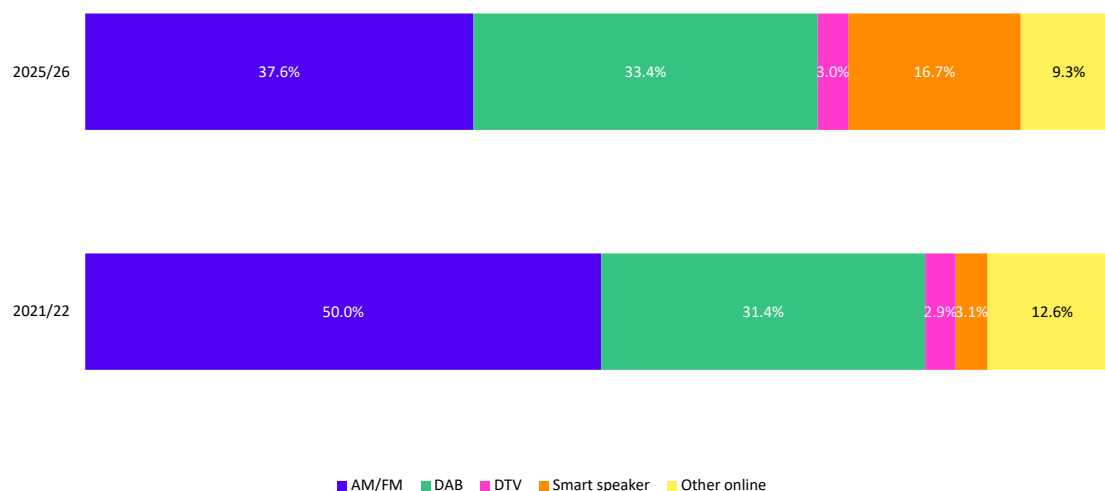


Source: RAJAR Q1 2026; U105 (Outside Belfast) TSA; six-month weighting.

How people in Northern Ireland listen to radio has shifted considerably, even over the past four years since smart speakers were added to the RAJAR survey. In 2021/22, half (50.0%) of listening was through an AM/FM radio set, more than listening through DAB sets (31.4%), and 15.7% of it was online.²⁶ In the most recent twelve-month period, listening through an AM/FM radio set accounted for 37.6%. However, unlike the other nations, listening through analogue sets continues to be the single most used platform. Listening through DAB has remained stable at 33.4%, while online now accounts for over a quarter of listening (26.0%).

²⁶ Includes listening via smart speakers and other online listening e.g. via an app or website.

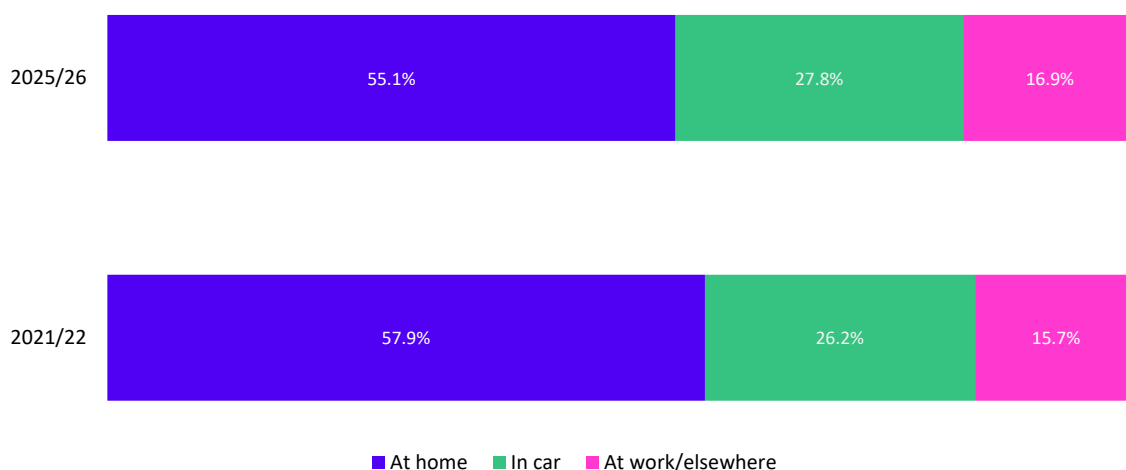
Figure 36: Share of listening by platform in Northern Ireland: 2019/20 vs 2025/26



Source: RAJAR; BBC Radio Ulster TSA; Q1 with 12-month weighting.

Looking at where people listen to the radio in Northern Ireland, over half of this time is at home, accounting for 55% of all weekly hours. The location of listening has remained stable in Northern Ireland compared to the other nations, where at work listening has decreased. In-car listening accounts for a higher proportion of radio hours in Northern Ireland than in the other nations. Almost a quarter (24%) of radio listeners in Northern Ireland *only* listen to the radio in a vehicle; this figure is up slightly from 21% in 2019/20, demonstrating the continued importance of in-car listening here.

Figure 37: Share of listening by location in Northern Ireland: 2019/20 vs 2025/26



Source: RAJAR; BBC Radio Ulster TSA; Q1 with 12-month weighting.

Online audio in Northern Ireland

Almost two-thirds of adults in Northern Ireland listen to music streaming each week

Ninety-two percent of adults listen weekly to audio content, and – based on the selection of audio types in Figure 38 below - an average of 3.6 different audio types are used each week. Both music streaming services and radio stations reach 64% of adults each week. The most used service for streaming music is Spotify, with 49% of adults in Northern Ireland listening each week to music through either the premium or free versions.

Figure 38: Weekly reach of different types of audio, by nation: 2026



Source: Ofcom Audio Survey. Q1 How often, if at all, do you listen to any of the following? Base: All adult respondents NET: Weekly. *For background listening

Figure 39: Weekly reach of online music streaming services, by nation: 2026

	UK	Northern Ireland	Scotland	Wales
Spotify (net)	49%	49%	52%	44%
YouTube (net)	38%	44%	40%	31%
Amazon Music (net)	19%	19%	18%	20%
BBC Sounds	15%	14%	15%	14%
Apple Music	15%	12%	15%	13%

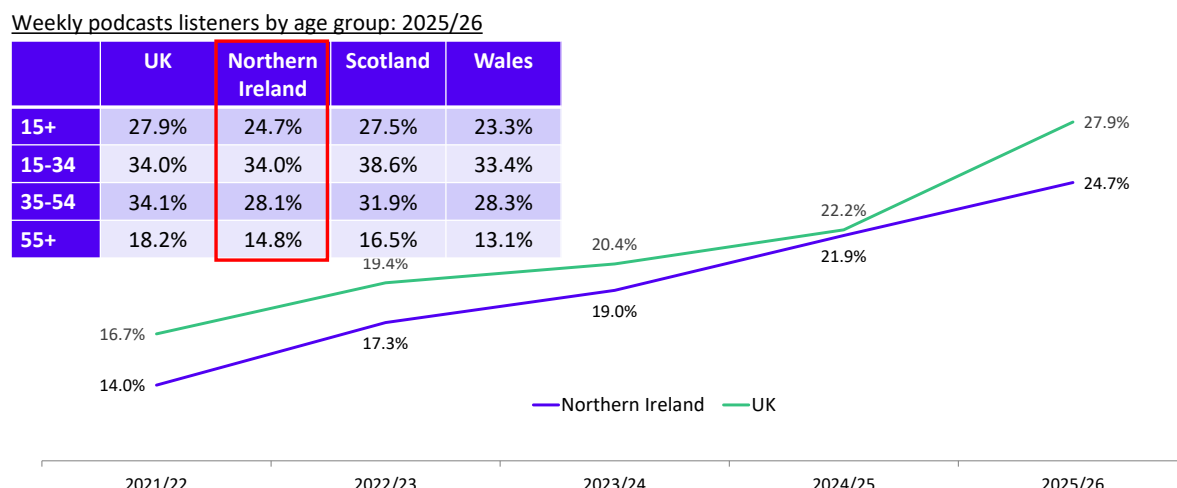
Source: Ofcom Audio Survey 2026. Q1 How often, if at all, do you listen to any of the following? Base: All Adult respondents NET: Weekly.

Podcasts

A quarter of adults in Northern Ireland now listen to podcasts each week

Twenty-five per cent of adults in Northern Ireland now listen to podcasts on a weekly basis, a steady increase from 14% four years ago. Younger adults are more likely to listen to podcasts with 34% of 15-34-year-olds in Northern Ireland listening each week.

Figure 40: Weekly reach of podcasts over time: 2021/22 vs 2025/26



Source: RAJAR; BBC Radio Ulster TSA; Q1 with 12-month weighting.

Several Northern Ireland-based podcasts are in the top 10 ranking

The top 10 podcasts in Northern Ireland have some overlap with the UK as a whole – half of the UK’s top 10 podcasts by reach are also within the top 10 ranking for Northern Ireland, with *The Joe Rogan Experience* being ranked first in both Northern Ireland and the UK. Podcasts from Northern Ireland itself include Shane Todd’s comedy and discussion podcast *Tea With Me* (ranked second), *The Bomb Squad Podcast*, hosted by comedians Colin Geddis and Aaron McCann (ranked 9th) and the *Give My Head Podcast*.

Figure 41: Top 10 podcasts in Northern Ireland, by reach: Q2 2025-Q1 2026

	Title	Producer	Reach	Genre
1	The Joe Rogan Experience	Spotify	9.9%	Comedy
2	Tea With Me	Shane Todd	6.0%	Comedy
3	The Diary Of A CEO with Steven Bartlett	The Diary of a CEO	5.4%	Business
4	Crime Junkie	Audiochuck	5.0%	True Crime
5	The Rest is History	Goalhanger Podcasts	4.8%	History
6	Feel Better, Live More with Dr Rangan Chatterjee	Dr Rangan Chatterjee	4.5%	Health & Fitness

7	The Rest Is Politics	Goalhanger Podcasts	4.1%	News
8	Stick to Football	Global	3.9%	Sports
9	The Bomb Squad Podcast	Colin Geddis & Aaron McCann	3.7%	Comedy
10	Give My Head Podcast	One L Studios	3.0%	Comedy

Source: Edison Research Podcast Ranker UK Northern Ireland n=168.

Podcasts in Irish and Ulster Scots

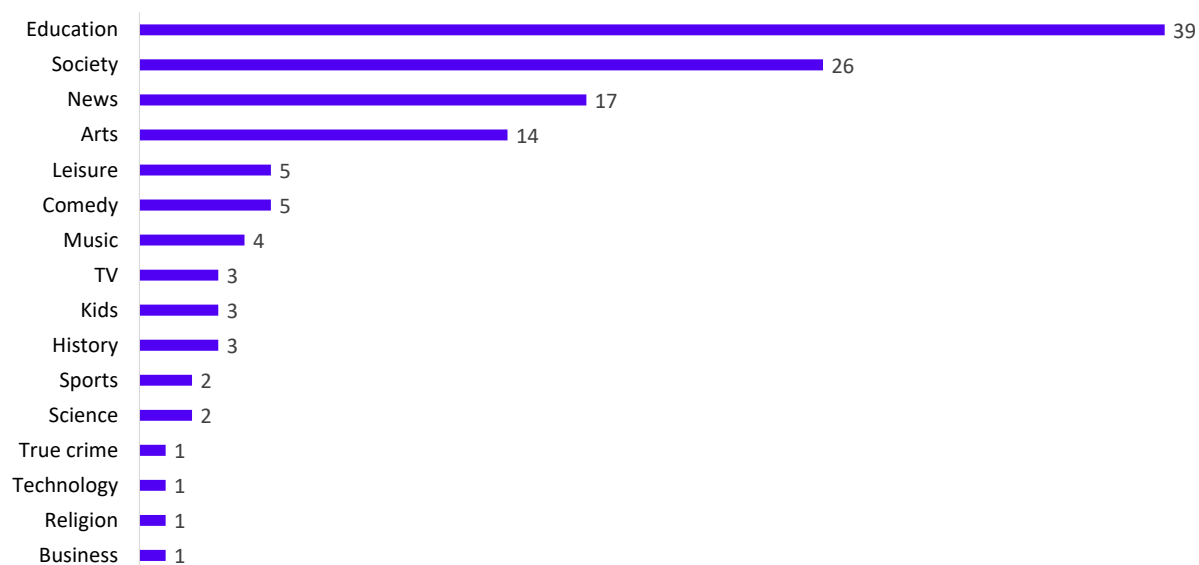
A range of podcasts in Irish and in Ulster Scots have been produced for people in Northern Ireland. Examples of podcasts in Irish from Northern Ireland include BBC Radio Ulster's *Blas Pod* and podcasts from Belfast community Radio station Raidió Fáilte such as *Bantracht* (a discussion podcast about family life), which has received funding from Northern Ireland Screen's Irish Language Broadcast Fund. Another example of a podcast receiving funding from this source is *Idir Chroí agus Anam*, a podcast about spirituality which launched in 2025. Podcasts in or about Ulster Scots include *Thran – The Ulster Scots Podcast*, funded by Northern Ireland Screen's Ulster-Scots Broadcast Fund and produced by Ulster Scots community radio station Fuse FM, based in Ballymoney.

The decentralised nature of podcasts and differences in how people define them, means that there is no single definitive list of podcasts in general. We used the Podcast Index dataset in order to get a sense of the number of podcasts in the Irish language.²⁷ Although it is not always possible to tell the location of the publisher, we believe that majority of these come from the Republic of Ireland (with Irish public service media organisations RTÉ and TG4 featuring prominently) rather than from Northern Ireland. In total we identified 129 podcasts which met our criteria.²⁸ Given the complexities of identifying and classifying podcasts, this figure should be seen as indicative. Among the 129 podcasts, the median number of episodes was 11, suggesting a long tail of podcasts with relatively few episodes.

²⁷ It is harder to identify podcasts in the Ulster Scots language given that there is no unique language code identifier in RSS feeds.

²⁸ From our initial list of 234 podcast RSS feeds with the <ga> language tag for Irish we removed titles which on review were spam, or where despite using the <ga> language identifier in the RSS metadata, there was no evidence of the use of the Irish language. We included podcasts several podcasts which had been erroneously assigned RSS language tags for Scottish Gaelic (code <gd>) which our review identified as being in Irish. We also excluded podcasts with fewer than 2 uploaded episodes. We note that that incorrect or missing language metadata may mean that some Irish language podcasts were not captured in our initial list and thus the total here may understate the overall number of podcasts in Irish.

Figure 42: Number of podcasts identified as being in Irish, by primary category



Source: Ofcom analysis of [Podcast Index](#) data. Chart includes only those podcasts where a primary category (as labelled by Podcast Index) has been assigned (127/129). We have not applied a filter on upload frequency meaning that some of these titles may not upload regularly.