

Media nations: Northern Ireland 2022



Published 17 August 2022

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Overview

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

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

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

What we have found, in brief

Overall viewing of TV and video in Northern Ireland has fallen from its pandemic peak

- The average amount of time people in Northern Ireland spent watching TV and video content in 2021, across all devices, was 4 hours 9 minutes per person per day, down 11 minutes on 2020, which was heavily influenced by Covid-19 restrictions, but up on 2019.
- Time spent watching TV from broadcasters in Northern Ireland fell by 6.3% compared to 2020, illustrating that the long-term trend of decline in overall viewing of broadcasters' content, seen over the past decade, has resumed.
- Despite the decrease since 2020, however, people in Northern Ireland spent 3 hours 1 minute per day watching broadcast TV on the TV set in 2021; a similar amount to England but less than Scotland and Wales.
- Subscription video-on-demand (SVoD) services saw a small uplift in Q1 2022, with 70% of households in Northern Ireland subscribing to at least one service, up from 68% in Q4 2021.
- Broadcaster video-on-demand (BVoD) services had comparable levels of reach to SVoD, with most consumers using multiple services. BBC iPlayer was the most popular free-to-view streaming service in Northern Ireland, used by 73% of online adults and teens.
- Social video platforms are also competing for viewing time and are particularly popular among younger age groups. Internet users in Northern Ireland aged 15+ spent on average 21 minutes per day on TikTok and 39 minutes per day on Facebook and Messenger in March 2022.

There was broad satisfaction with public service broadcasting among those who watch it in Northern Ireland, as PSB spend on programming for Northern Ireland increases

- In 2021, the main five PSB channels accounted for a combined 54.4% share of the total broadcast TV audience in Northern Ireland, largely the same as in 2020.
- Audiences in Northern Ireland are broadly satisfied with PSB, with three in five (63%) of those watching PSB channels in the past six months saying this, and 12% saying that they are dissatisfied.
- Trusted and accurate news is considered by audiences in Northern Ireland to be the most important attribute of PSB, followed by *'programmes that help me understand what is going on in the world today'* and *'a wide range of different types of programmes'*.
- Following production challenges at the height of the pandemic, spend on first-run content for viewers in Northern Ireland increased by 11% in 2021, to £25.8m.
- The BBC increased its spend on first-run content for Northern Ireland; up by 10% since 2020. However, BBC hours of first run content for Northern Ireland dropped 2% in 2021, largely driven by news and non-current affairs.
- Of the spend outside London by PSB channels, 2.5% was on Northern Ireland productions in 2021; although the proportion of spend is lower than for other nations, it has increased since 2020.

The ways in which people access and listen to radio and audio content in Northern Ireland continued to evolve

- Nine in ten adults listen to the radio in Northern Ireland, at an average of nearly 20 hours each week.
- Local radio continues to play a significant role in Northern Ireland, accounting for a 58% market share compared to 30% across the UK.
- Analogue still accounts for half of listening hours, and smart speakers have not had the same impact in Northern Ireland as they have had on the UK overall, accounting only for 6% of overall listening time compared to 10% in the UK.
- This is despite people in Northern Ireland being more likely than the overall average for households in the UK to have a smart speaker in their home (49% vs 39%).
- People in Northern Ireland were more likely than those across the UK as a whole to use their smart speaker to stream music, and less likely to use it to listen to radio.
- Per-capita commercial radio revenues in Northern Ireland grew by 14% between 2020 and 2021.

TV: services, devices and trends

Following 2020, when TV and video viewing habits were significantly affected by Covid-19-related restrictions, trends in 2021 and early 2022 pointed both to the resumption of long-term, pre-pandemic trends, and to the lasting impact of the long periods of lockdown. While most types of viewing have fallen from the unprecedented levels of 2020, people are spending an increasing proportion of their viewing time watching on-demand content, including on services provided on a subscription basis (e.g. Netflix) and free-to-view from broadcasters (e.g. BBC iPlayer) and social video platforms (e.g. YouTube).

This chapter draws on data from audience-measurement and ratings agencies, as well as consumer surveys, to evidence and provide commentary on continuing shifts in audiences' TV and video viewing habits and preferences.

Traditional TV platforms

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

Television sets are an established fixture in our homes, with more than nine in ten households in Northern Ireland (97%) having a TV set in 2020.¹ But the way we access services on our TV sets is changing, primarily because of the amount of content that is being delivered and accessed through the internet.

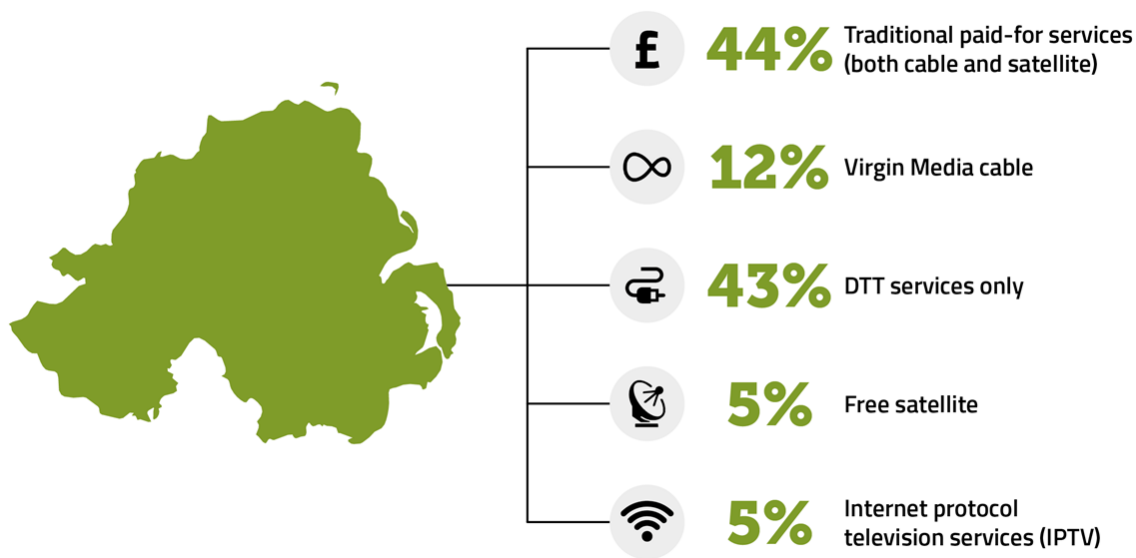
Traditional paid-for television services such as satellite (mainly Sky) and cable services (Virgin Media) were present in 44% of homes in Northern Ireland in Q1 2022. Paid-for satellite accounts for most of these, with Virgin Media's cable service present in 12% of households in Q1 2022, up from 11% in Q4 2021.

Just over half of homes have a free TV service only – either Freeview or Freesat. DTT services *only* (delivered through an aerial) account for most free TV viewing (43%), with free satellite present in 5% of homes, through Freesat.

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.

¹ BARB Establishment Survey Q1 2022.

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

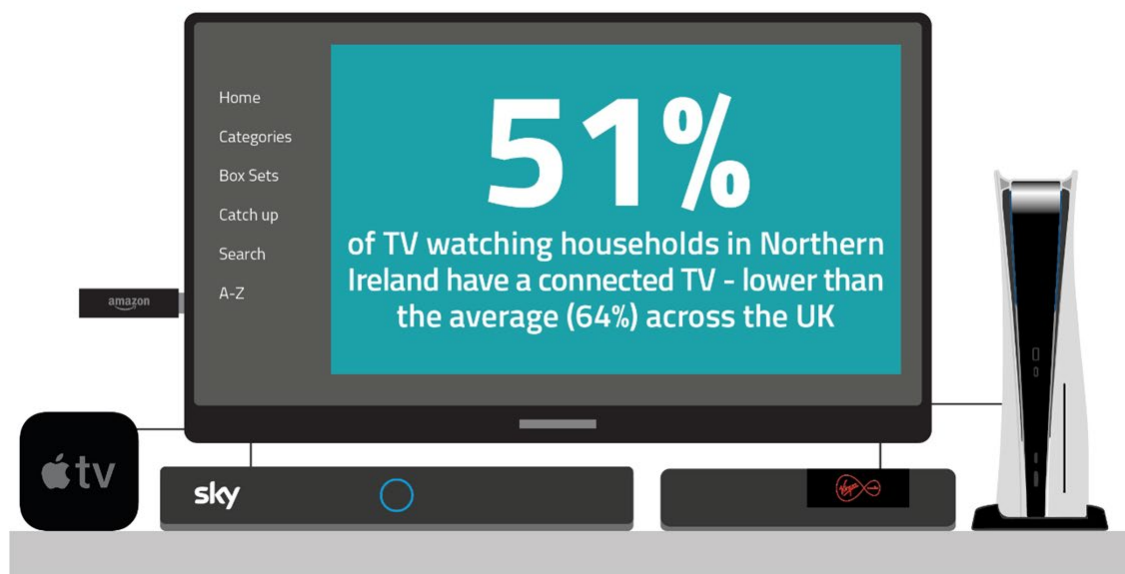


Source: BARB Establishment Survey Q1 2022

Half of TV users in Northern Ireland had connected TVs

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

Figure 2: Connected TVs in Northern Ireland



Source: Ofcom Technology Tracker 2022

About half (51%) of TV users in Northern Ireland have a connected TV, using one of these methods, in 2022. This is lower than the average across the UK, where 64% of TV homes have a connected TV.²

Broadband take-up in Northern Ireland

Nine in ten (90%) homes in Northern Ireland had an internet connection at the beginning of 2022, and 86% had fixed broadband.³ In terms of speeds, as of December 2021, 91% of all homes in Northern Ireland were able to receive superfast broadband (download speeds of at least 30 Mbit/s). Of these, nearly three-quarters of households were using a superfast service, up from 65% in 2020. Take-up of full-fibre services in Northern Ireland, where they were available, was 19%.⁴

Video on demand

Growth in SVoD households has started to slow

After years of strong growth in the number of households using SVoD services in Northern Ireland, the rate of increase has now started to slow. By Q1 2022, the proportion of households subscribing to at least one SVoD service was 70%, compared to 68% in Q4 2021.⁵

There is growing choice for viewers in the range of services they can subscribe to. Netflix remains the most popular SVoD service in Northern Ireland, followed by Amazon Prime Video and Disney+, but there is also a huge variety of small SVoD services in Northern Ireland which collectively have significant reach. This includes services such as NOW, and genre specialist services such as Hayu (reality).

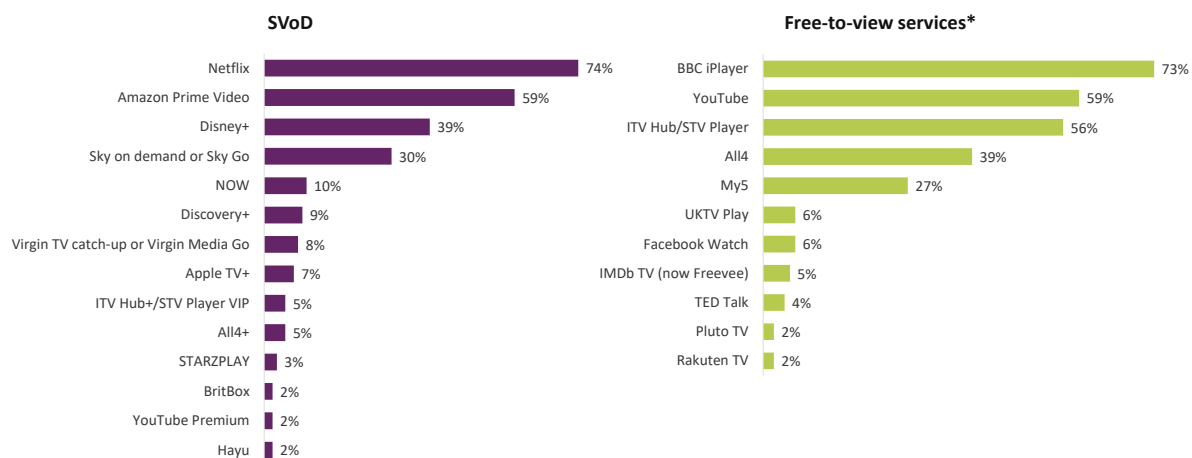
² Ofcom Technology Tracker 2022.

³ Ofcom Technology Tracker 2022.

⁴ Ofcom, Connected Nations 2021: Northern Ireland report.

⁵ BARB Establishment Survey Q1 2022.

Figure 3: Video-on-demand services used to watch programmes, films or other video in the past three months



Source: Ofcom VoD Survey 2022. Online adults/teens aged 13+, Northern Ireland. Question: Q1a. Can you tell us which of the following services you have personally used to watch programmes, films or other video content in the past 3 months? Base: 159. Fieldwork conducted 22-28 February 2022. *Payment of licence fee required to use BBC iPlayer. NOW includes NOW Entertainment, NOW Cinema and NOW Sports.

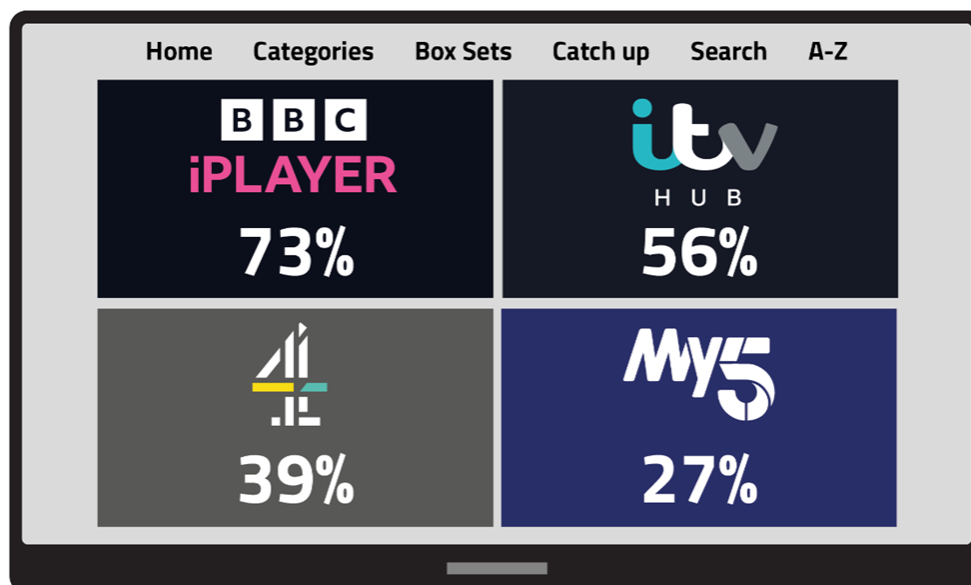
BVoD has comparable levels of reach to SVoD, with most consumers using multiple streaming services

According to Ofcom’s VoD survey, nearly nine in ten (89%) online adults and teens in Northern Ireland used a free-to-view service (any streaming service not behind a paywall, including YouTube), slightly lower than the other UK nations.

VoD services from the public service broadcasters made up four of the top five most popular free-to-view platforms for watching programmes, films and other video. BBC iPlayer (73%) was first, followed by ITV Hub/ STV Player (56%), All4 (39%) and My5 (27%). Apart from the PSB services, YouTube was also popular, with over nearly six in ten people in Northern Ireland using it.⁶ YouTube’s lower reach in this context may be explained by its large volume of short-form content and creator videos, which users do not associate with traditional ‘programmes’.

⁶ Ofcom VoD Survey 2022.

Figure 4: PSB video-on-demand services used to watch programmes, films or other video in the past three months



Source: Ofcom VoD Survey 2022. Online adults/teens aged 13+, Northern Ireland. Question: Q1a. Can you tell us which of the following services you have personally used to watch programmes, films or other video content in the past 3 months? Base: 159. Fieldwork conducted 22-28 February 2022. *Payment of licence fee required to use BBC iPlayer.

Watching sport online: BBC iPlayer is the most popular for watching live or catch-up sports content

In Northern Ireland BBC iPlayer was the most popular online video service for watching live or catch-up sports content by some margin, with Amazon Prime Video second.

SVoD services are buying more and more sports rights, both in the UK and globally; Amazon streams sports such as Premier League football matches, has significant tennis coverage including ATP, WTA and the US Open, and the Rugby Nations Cup. Following a bid for rights in 2022, it will also show weekly Champions' League matches from the 2024/25 season onwards.

Sports content on Netflix and Disney+ is currently limited to sports documentaries in the UK, rather than live or catch-up sports content, but these providers' entry into live and catch-up sports cannot be ruled out, and reports indicate that Netflix has recently bid for rights to stream Formula 1.⁷

Figure 5: Top ten online video service used by adults and teenagers who watched live or catch-up sports in the past three months, by UK nation: February 2022

Online video service	England	Scotland	Wales	Northern Ireland
BBC iPlayer	25%	26%	24%	24%
Amazon Prime Video	18%	13%	23%	17%
ITV Hub/STV Player	10%	8%	10%	12%
YouTube (excludes clips)	8%	8%	9%	4%
Sky Sports (including NOW and Sky Go)	12%	6%	13%	13%
BT Sport	8%	6%	5%	11%
Facebook	9%	4%	7%	3%
All4	5%	2%	3%	4%
Twitch	3%	1%	2%	1%
Discovery+	3%		4%	2%

Source: Ofcom VoD Survey 2022. Online adults/teens aged 13+. Question: Q2a. Which if any, of these online services have you personally used to watch live or catch-up sports events in the past 3 months? Base: England 1705; Scotland 175; Wales 167 and Northern Ireland 159. Fieldwork conducted 22-28 February 2022.

Audience satisfaction with subscription streaming services is high

Of those who had used the service in the last six months, nine in ten said they were satisfied with Netflix (91%), with more than four in five saying the same for Amazon Prime Video (84%) and Disney+ (84%).

⁷ What's On Netflix, [Netflix Reportedly Bids for Formula 1 Rights But Loses to Disney's ESPN](#), 27 June 22.

Figure 6: Audience satisfaction with selected online streaming services



Source: Ofcom PSM Tracker 2021, Q39. Satisfied Summary - Overall, how satisfied or dissatisfied are you with these TV catch-up, on-demand or streaming services? Base: All those in Northern Ireland who have watched platform in last 6 months (base size for each service in chart) (N.B. not all services shown here)

For the main subscription streaming services, ease of use and mass appeal were the main attributes being delivered well for audiences in Northern Ireland. About four in five viewers in Northern Ireland who had watched Netflix in the past six months said it delivered well on ‘providing services that are easy to find my way around’ (82%) and ‘easy to find something I want to watch’ (80%). A similar proportion said the same for ‘appeals to a wide range of different audiences’ (82%).

For Amazon Prime, just over three-quarters said it delivered well on a ‘wide range of different types of programmes, such as drama, comedy, entertainment or sport’ (77%) and ‘appeal[ing] to a wide range of different audiences’ (77%). For Disney+, three-quarters said it did well at delivering programmes that ‘appeal to a wide range of different audiences’ (75%), and it also delivered well on ‘provid[ing] services that are easy to find my way around’ (79%).

For people in Northern Ireland, the main reason for watching subscription streaming services was for their content; this included comments on high quality, range and specific genres that audiences favoured on these platforms.

“They have good films and programme I can’t get anywhere else. They are easy to use.”

Man, 45-54

“To watch shows and movies that aren’t shown regularly on TV. I can watch them anytime and anywhere.” Woman, 16-24

“Wide variety of different programmes.” Man, 75+

Among those who had not watched selected SVoD services in the past six months, one the main reasons for not using them was because of cost; this could either be not wanting to pay, the cost of the service, or not wanting to pay for more services than they already had. Another key reason was the content, or the programming not interesting them, while a small minority said they struggled to access the service at all (for instance, due to poor internet).

“I don’t want to pay for more subscription services.” Man, 25-34

“I have enough services I use already.” Man, 45-54

“Not subscribed due to costs. We would be swamped if we had any more to watch.”
Man, 65-74

TV viewing in Northern Ireland

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 28-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 28 days after the first broadcast (time-shifted).

Total video viewing on the television set in Northern Ireland declined by 11 minutes compared to 2020, to an average of 4 hours 9 minutes per person per day in 2021. Seventy-three per cent of this time was spent watching broadcast TV (3 hours 1 minute). However, all of the decrease in viewing on the TV screen can be attributed to a reduction in broadcast TV viewing, which is down by 6.3% since 2020. The average weekly reach for all measured broadcast TV in Northern Ireland in 2021 was 83.0%, compared to 85.3% in 2020.

Figure 7: Average daily minutes of TV screen time, per person, in Northern Ireland: 2018-2021



Source: BARB. All individuals (4+). Average minutes of viewing/day. Unmatched = 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 AVoDs that has not broadcast on linear television channels, for example BVoD exclusives and historical box-sets.

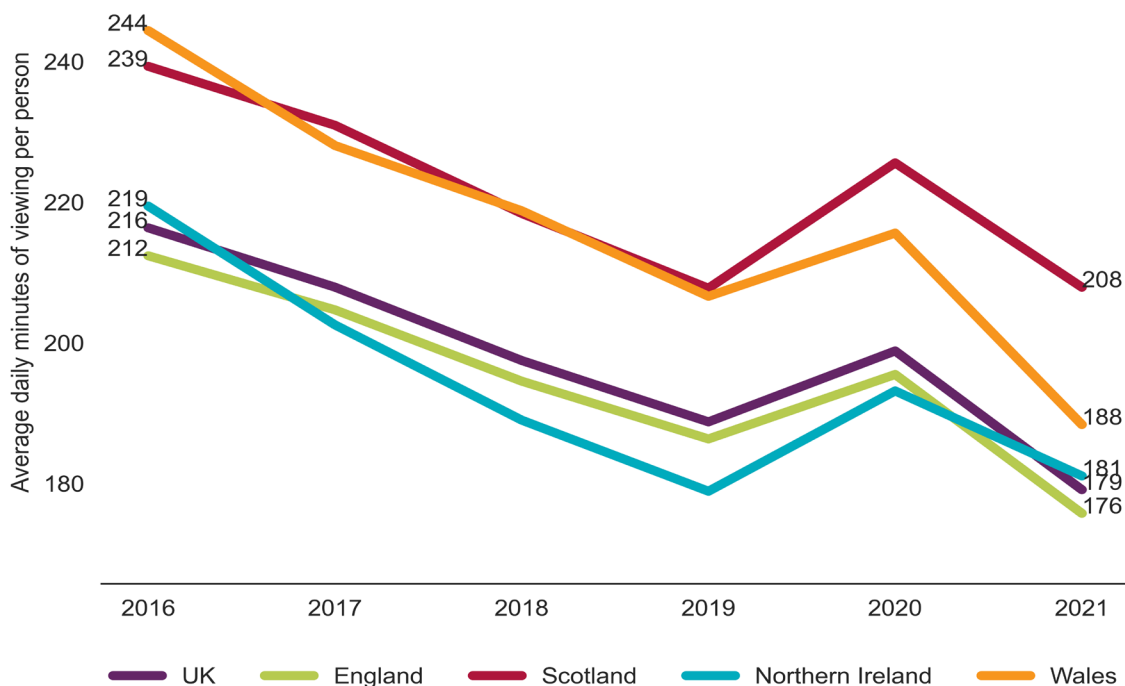
Northern Ireland viewers watched as much broadcast TV as England, but less than both Scotland and Wales

On average, people in Northern Ireland spent 3 hours 1 minute per day watching broadcast TV on the TV set in 2021, the third highest of any nation in the UK. Compared with 2020, this was down by 12 minutes.

Proportionally, this represented a 6.3% decline between 2020 and 2021, compared to the UK average decline of 9.9%. Northern Ireland had the smallest decrease in daily viewing of all the UK nations.

The average weekly reach for all measured broadcast TV in Northern Ireland in 2021 was 83.0%, compared to 85.3% in 2020.

Figure 8: Average daily minutes viewed per person, by nation: 2016-2021

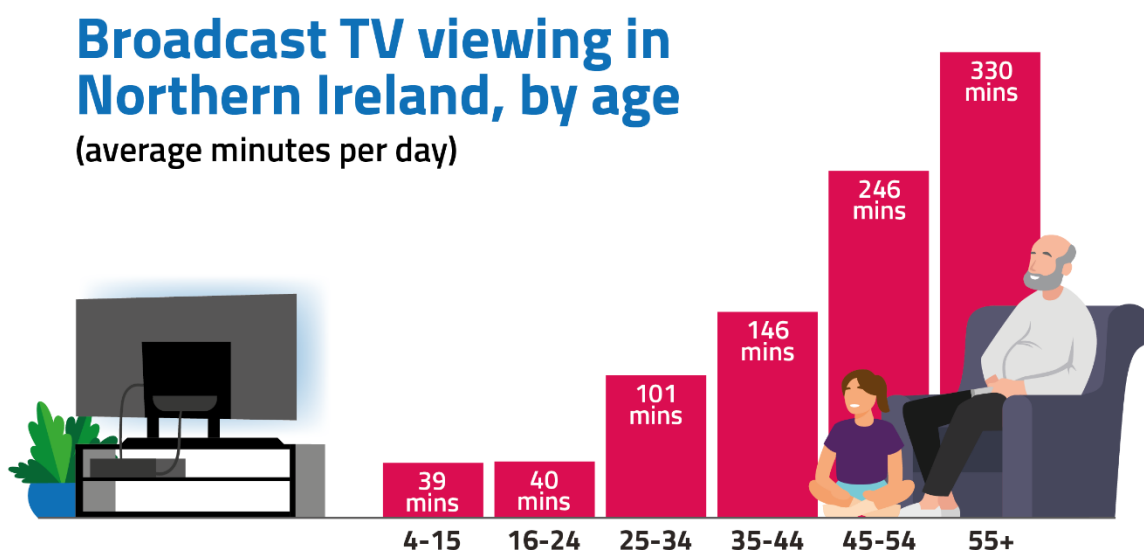


Source: BARB. BBC areas, all individuals (4+).

Broadcast viewing decreased among all age groups

Older people in Northern Ireland watched more broadcast TV on the television set than younger viewers. The over-54s watched more than any other age group, at an average of 5 hours 30 minutes per day, down by 4.1% since 2020. Those aged 4-15 watched the least, at an average of 39 minutes per day, down by 22.2% since 2020.

Figure 9: Average daily minutes viewed, by age group



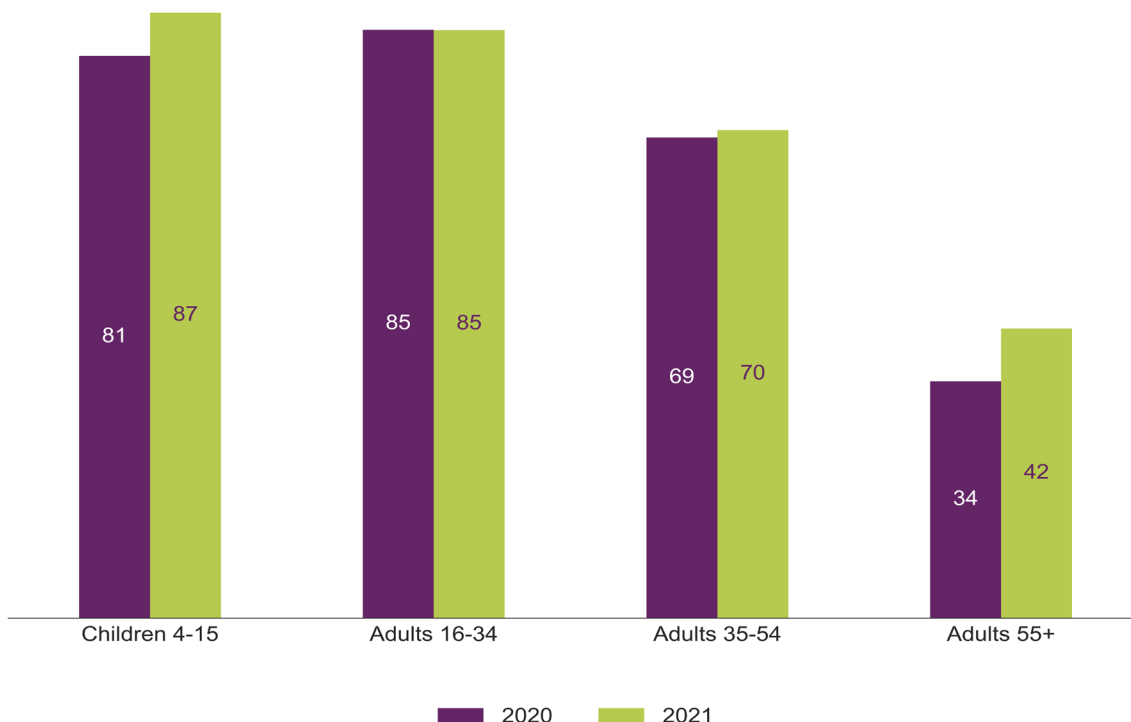
Source: BARB. BBC areas, all individuals (4+).

The increase in unmatched TV viewing was driven by the over-54s in Northern Ireland

Younger people in Northern Ireland, as in the rest of the UK, watched more non-broadcast TV on the television set than older viewers (non-broadcast services on the TV set are classified as ‘unmatched’ by television measurement agency BARB and includes YouTube, gaming, and streaming services like Netflix and Amazon Prime). The greatest proportional increase in unmatched TV viewing was among the over-54 age group, who watched an average of 42 minutes per person per day in 2021, suggesting that older people are increasingly using the TV set for more types of viewing and activities. Viewing increased by 7.7% among 4-15-year-olds, to an average of 87 minutes. Those aged 35-54 also increased their viewing; by 1.5% to an average of 70 minutes.

Unmatched viewing remained largely unchanged for those aged 16-34 and 35-54, who watched an average of 85 and 70 minutes per day respectively.

Figure 10: Average daily minutes of unmatched viewing time per person in Northern Ireland, by age: 2020-2021



Source: BARB. BBC Northern Ireland 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.

Meghan and Harry interview most-watched programme

*Oprah with Megan and Harry*⁸ was the most-viewed programme in Northern Ireland in 2021 on UTV, with an average audience of 531,000. Two programmes that were filmed in Northern Ireland – *Line of Duty* and *Bloodlands* – shown on BBC One, were the second and third most-watched programmes, pulling in more than half a million viewers each. News bulletins, as well as a Prime Ministerial statement relating to key moments in the Coronavirus pandemic, also feature prominently among the top ten programmes.



⁸ Image courtesy of ITV.

Figure 11: Top ten most-watched programmes in Northern Ireland: 2021

Rank	Programme Title	Channel	Date	Average audience (000s)	Programme Share %
1	<i>Oprah With Meghan and Harry</i>	UTV	08/03/2021	531	62.1
2	<i>Line of Duty</i>	BBC One	02/05/2021	519	64.1
3	<i>Bloodlands</i>	BBC One	21/02/2021	506	55.4
4	<i>I'm a Celebrity... Get Me Out of Here!</i>	UTV	21/11/2021	399	55.8
5	<i>UTV Live</i>	UTV	05/01/2021	351	51.0
6	<i>Prime Ministerial Statement</i>	BBC One	04/01/2021	342	40.5
7	<i>BBC Newslive</i>	BBC One	04/01/2021	330	45.9
8	<i>DIY SOS</i>	BBC One	22/02/2021	324	40.4
9	<i>The Pembrokeshire Murders</i>	UTV	11/01/2021	320	42.5
10	<i>Euro 2020</i>	BBC One	11/07/2021	310	51.8

Source: BARB consolidated to 28 days. Highest occurring episode on individual channels.

Social video in Northern Ireland

Young adults in Northern Ireland who visited TikTok in March 2022 spent about half an hour on the platform per day

TikTok is continuing to grow, reaching 45% of adult internet users in Northern Ireland in March 2022. It is particularly popular among younger adult users, with 64% of online 15-24-year-olds in Northern Ireland visiting the platform.

Figure 12: UK nations’ online adult reach of TikTok, by age: March 2022



Source: © Ipsos, Ipsos iris Online Audience Measurement Service, 1 March – 31 March 2022, adults age: 15+, UK nations. Note: TV set and smart display use not included.

Adult TikTok visitors in Northern Ireland spent on average about 21 minutes per day on the platform in March 2022, while adult visitors to Facebook and Messenger spent on average 39 minutes per day on the platform.⁹

There are clear demographic differences in the length of time spent on social video platforms: adult visitors aged 55-64 to Facebook and Messenger spend the most time, on average, on the platform, while 15-24-year-olds spend less than other adult groups. On Snapchat, 15-24-year-olds spend the most time on the platform, compared to older visitors.

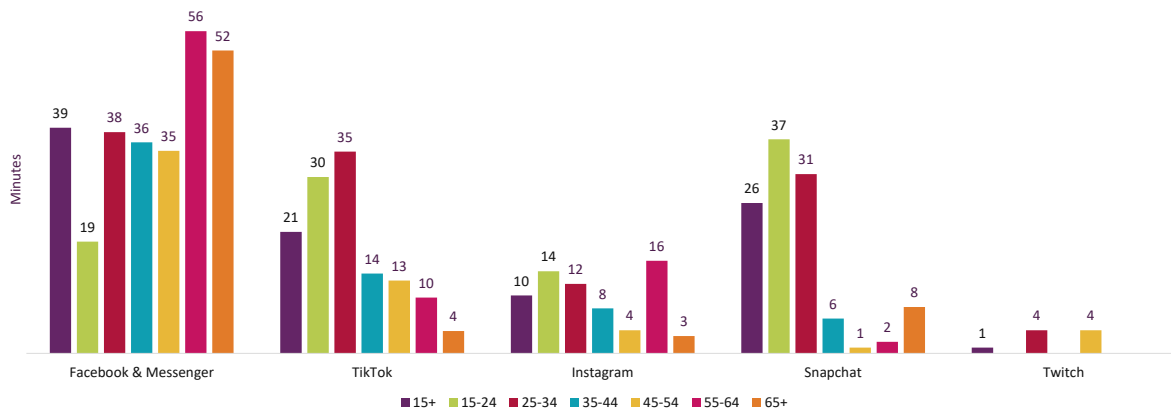
In March 2022, the almost 142,000 15-24-year-old TikTok visitors in Northern Ireland spent half an hour on TikTok per day, while the 171,000 15-24-year-old Snapchat visitors spent on average 37 minutes per day. In comparison, online visitors aged 15-24 to Facebook (including FB Messenger) and Instagram spent 19 and 14 minutes per day respectively.

In July 2021, TikTok increased its maximum video length from one minute to three minutes, and by October the average video length was two minutes. This may be contributing to the increased time spent on TikTok.¹⁰

⁹ © Ipsos, Ipsos iris Online Audience Measurement Service, 1 March – 31 March 2022, adults age: 15+, Northern Ireland. Note: TV set and smart display use not included.

¹⁰ TikTok newsroom, [Discover more ways to create, connect and be entertained with longer videos on TikTok](#), October 2021.

Figure 13: Time spent per day by online adult visitors in Northern Ireland to selected social video platforms, by age: (minutes)



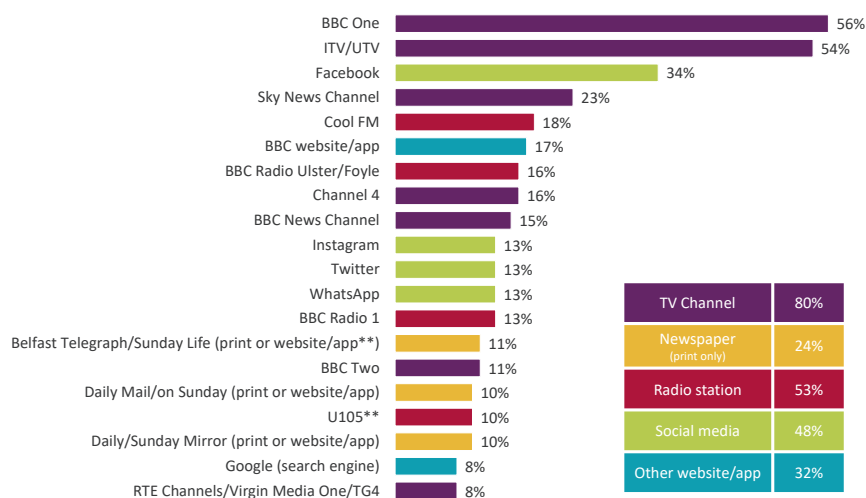
Source: © Ipsos, Ipsos iris Online Audience Measurement Service, 1 March – 31 March 2022, adults age: 15+, Northern Ireland. Note: TV set and smart display use not included. Custom-defined list by Ofcom. Please note ‘time spent’ relates to time spent on the platform, which can include viewing video, communicating, scrolling or any other activity. At present YouTube time spent is not measurable using Ipsos Iris, see [UK report](#) for information on YouTube. Outlier use by panellists in the 55-64 age group for Instagram and 65+ for Snapchat has probably skewed duration measurement.

News sources in Northern Ireland

Television remains the most popular platform used for news in Northern Ireland

About half of adults in Northern Ireland (56%) use BBC One and UTV (54%) for news in general. Other TV channels in the top ten included Sky News Channel, Channel 4 and BBC News Channel. Social media ranked highly too, with Facebook the third most-popular source of news (34%). The BBC website/app was the highest-ranking website or app (17%) and Cool FM was the top radio station cited (18%). No newspapers made the top ten.

Figure 14: Top 20 sources of news in Northern Ireland



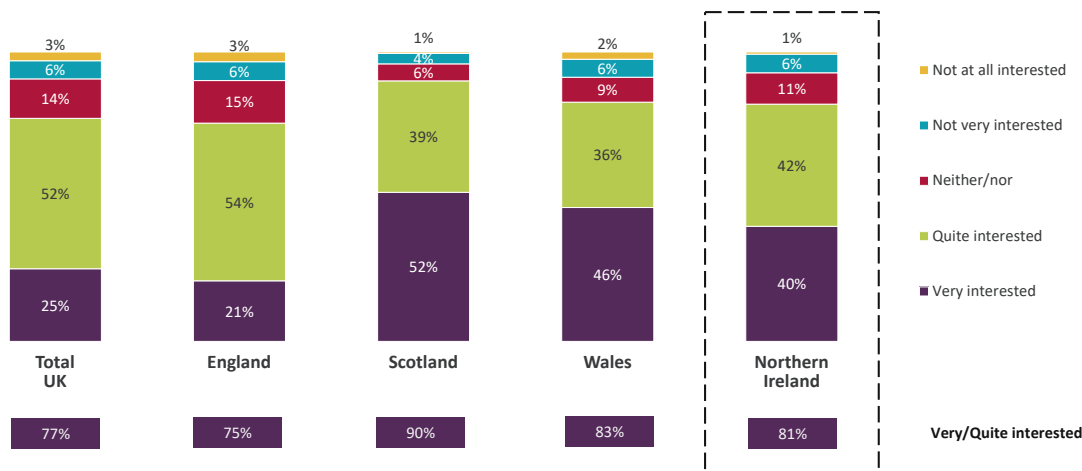
Source: Ofcom News Consumption Survey 2022 – Combined F2F and online sample. Base: All adults 16+ in Northern Ireland - 2022 W2*=305. *2022 W1 data not shown because face-to-face fieldwork was not possible during Covid-19 pandemic. **Added in 2022

There is a significant amount of interest in news about Northern Ireland among people who live there

About two in five adults who follow news claim to be ‘very interested’ in news about Northern Ireland (40%), rising to 81% who are either ‘very’ or ‘quite’ interested.

As shown below, those who live in Northern Ireland, Scotland and Wales are more likely to be ‘very interested’ in news about their nation.

Figure 15: Level of interest in news about own nation, by nation

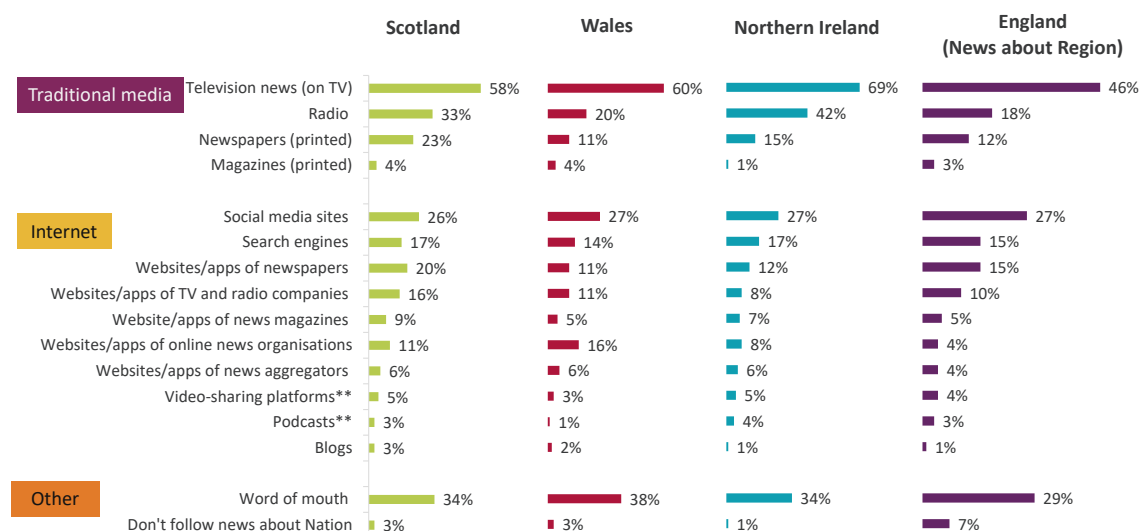


Source: Ofcom News Consumption Survey 2022 – Combined F2F and online sample. Base: All adults 16+ who follow news 2022 W2* - Total=2708, England=1758, Scotland=332, Wales=329, Northern Ireland=289. *2022 W1 data not shown because face-to-face fieldwork was not possible during Covid-19 pandemic.

Television is the most popular way for people to access news about their own nation – but radio use is higher in Northern Ireland than in other UK nations

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. It was significantly higher in Northern Ireland, with 42% of adults using radio to get news about their nation.

Figure 16: Platforms used to access news about own nation, by nation: 2022



Source: Ofcom News Consumption Survey 2022 – COMBINED F2F & ONLINE sample. Base: All adults 16+ who follow news 2022 W2* - England=1758 Scotland=332, Wales=329, Northern Ireland=289. *2022 W1, and 2021, data not shown because face-to-face fieldwork was not possible during Covid-19 pandemic. ** Added in 2022.

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

Television was the most popular source for news about Northern Ireland, for people in the nation. Just under half used UTV for this (47%) which was more than BBC One (used by 38%) despite the two channels being used by similar proportions for news in general. Facebook (18%) and BBC Radio Ulster/Foyle (13%) were the most-used online and radio sources for news about Northern Ireland respectively.

Figure 17: Sources used to access news about own nation, by nation: 2022

England		Scotland		Wales		Northern Ireland	
BBC One	31% ▼	STV	31%	BBC One	46%	UTV	47%
ITV	18% ▼	BBC One	26%	ITV Wales	28%	BBC One	38%
Facebook	17%	Facebook	15%	Facebook	21%	Facebook	18%
BBC website/app	8%	BBC website/app	10%	BBC website/app**	8%	BBC Radio Ulster/Foyle	13%
BBC News Channel	6% ▲	BBC Scotland TV	9%	Twitter	6%	BBC website/app	11%
Twitter	5%	Twitter	8%	Any Wales based news sites/apps	6%	Cool FM	10%
		BBC Radio Scotland	7%	BBC Radio Wales/Cymru	5%	U105	6%
		BBC News Channel	6%	BBC News Channel	5%	Twitter	6%
		Bauer local commercial radio	6%			The Belfast Telegraph	5%
		Instagram	6% ▲			Any NI based news website/app	5%
		Any Scotland based daily newspaper	5%				
		Any Scotland based news sites/apps	5%				
		Sky News Channel	5%				
Don't follow region news	10%	Don't follow Nation news	5%	Don't follow Nation news	6%	Don't follow Nation news	2%

Source: Ofcom News Consumption Survey 2022 – Combined F2F and online sample. Base: All adults 16+ using TV/Newspapers/Radio/Internet/Magazine for news 2022 W2* - England=1727, Scotland=326, Wales=325, Northern Ireland=287. *2022 W1 data not shown because face-to-face fieldwork was not possible during Covid-19 pandemic. ** Includes Welsh language version. Only the sources with an incidence of 5%+ in each nation are shown. Green/red triangles indicate statistically significant differences between 2022 and 2020 (at 99% confidence level).

RoI channels continue to be available to many Northern Irish households

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 on 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.

RTÉ One / Two and TG4 are also available on Sky and Virgin Media, and are available via BT TV in areas where they are available on Saorview or Freeview.

Our survey found that 44% of TV viewing households in Northern Ireland said that they watched RTÉ One at least weekly, making it the most-watched RoI channel in Northern Ireland, although this is

closely followed by RTÉ Two.¹¹ Both these channels appeal more to older viewers and those in socio-economic group ABC1.

¹¹ Ofcom Technology Tracker 2022. The effective sample size in our survey was 456, which means that the error margins on this figure are +/- 6% points at 99% confidence interval. Our survey suggests that the real weekly reach figure lies between 38% and 50%.

Public service broadcasting

Introduction

Public service broadcasting (PSB) is an intervention, designed by Parliament, to ensure that UK audiences can enjoy a wide range of high-quality TV programmes that meet people's needs and interests as citizens and individuals.

Under the current framework, specified PSB services must collectively fulfil certain statutory purposes and individually meet a set of service-specific requirements.¹² When describing the public service channels taken together, the term public service broadcasting (PSB) is used. The term 'public service media' is a broader term which was used in Ofcom's review, [Small Screen: Big Debate](#), to reflect the fact that audiences are no longer limited to 'broadcast' channels and can watch content from the public service broadcasters on a range of broadcast and online services.¹³

Legislative reforms proposed to safeguard the future of public service broadcasting in the UK

In July 2021, Ofcom made recommendations to the UK Government on the future of the public service media (PSM) system for the next decade. The recommendations marked the conclusion of Ofcom's [Small Screen: Big Debate](#), an in-depth review of the future of PSM.

The UK Government recently set out its vision for the broadcasting sector in a White Paper ahead of the forthcoming Media Bill.¹⁴ Among other things, the paper explains the UK Government's intention to implement some of the key recommendations of our [Small Screen: Big Debate](#) review. These include a simplified remit, a new prominence regime for PSB online services on the major connected TV platforms, and greater flexibility for PSBs in how they deliver their obligations, including through their online services.

This chapter provides an update on key data relating to PSBs, including trends in audience viewing and a breakdown of output and content spend by PSB network. It also provides an overview of findings from Ofcom's proprietary PSM Tracker, examining audience perceptions of, and satisfaction with, public service media.

¹² See [Annex 8. PSB regulatory framework](#) regarding the PSB regulatory Framework, including the PSB remits and the service-specific requirements for the individual PSB providers.

¹³ During our [Small Screen: Big Debate](#) review, several respondents questioned the concept and scope of public service media and suggested it should be clearly defined in legislation. We agreed with the need for clarity and considered 'PSM' as the best way to describe public service content delivered through a range of platforms including broadcast TV and online services.

¹⁴ [Up next - the government's vision for the broadcasting sector](#), April 2022.

Public service broadcasting in Northern Ireland

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

PSB viewing trends

The main five PSB channels accounted for more than half of total broadcast viewing

In 2021, the main five PSB channels accounted for a combined 54.4% share of the total broadcast TV audience in Northern Ireland. This was largely the same as in 2020. BBC One and UTV had very similar audience shares; the highest among the individual PSB channels, at just over 20%. Notably, BBC One has its lowest audience share in Northern Ireland compared to other UK nations, while UTV has the highest compared to the Channel 3 licence-holders in other UK nations. Channel 5 had the lowest audience share of any individual PSB channel, at 4%.

Figure 18: Percentage share of total TV viewing for the five main PSB channels, by nation: 2021



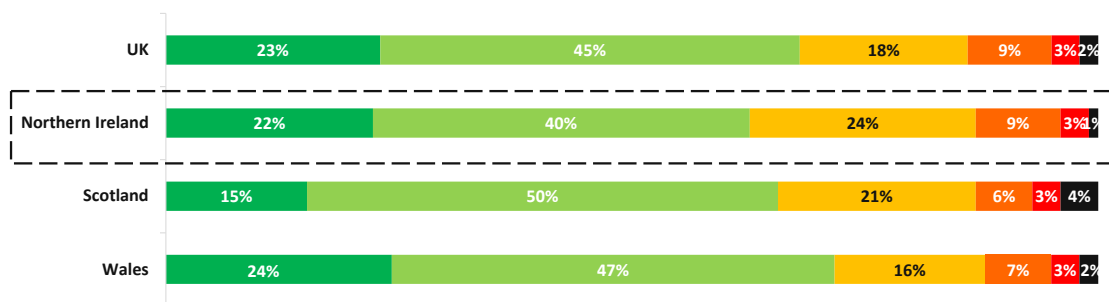
Source: BARB. BBC areas, all individuals (4+). Excludes any +1 channels.

Audience attitudes towards PSBs in Northern Ireland

Overall, audiences in Northern Ireland are broadly satisfied with public service broadcasting

In Northern Ireland, three in five (63%) of those who had watched a PSB channel in the past six months said they were satisfied with it; more than one in ten (12%) said they were dissatisfied. The level of satisfaction among viewers in Northern Ireland was broadly consistent with viewers across the UK: 67% of viewers of PSB services UK-wide said they were satisfied with it and 12% said they were dissatisfied.

Figure 19: Audience satisfaction with PSB channels overall

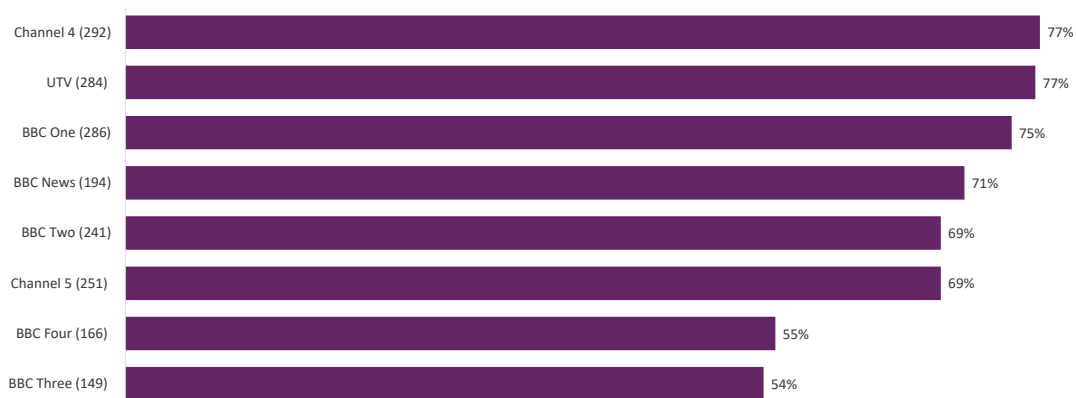


Source: Ofcom PSM Tracker 2021, Q28. And now, if you think about ALL the public service broadcaster channels combined, how satisfied are you that combined they provide the different elements asked about in the previous question? Base: All in country who have watched any PSB channel or service in last 6 months (Northern Ireland=317, Scotland=291, Wales=301, UK=2917).

Three-quarters of PSB viewers are satisfied with Channel 4, UTV and BBC One

When asked to consider PSB channels individually, three-quarters said they were satisfied with Channel 4 (77%), UTV (77%) and BBC One (75%). About seven in ten said the same of BBC Two (69%) and Channel 5 (69%).

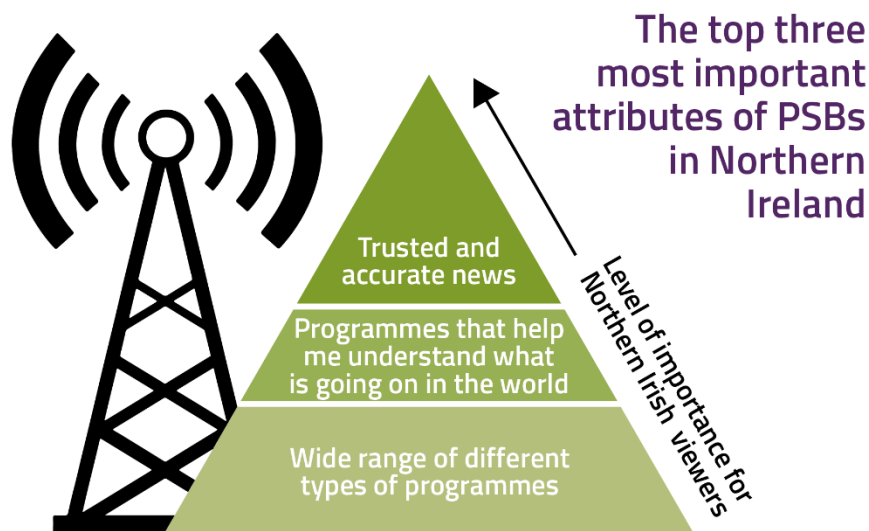
Figure 20: Audience satisfaction with individual PSB channels



Source: Ofcom PSM Tracker 2021, Q23. Satisfied Summary - Thinking about some of the specific channels you have watched in the last 6 months, overall, how satisfied or dissatisfied are you with these TV channels? Base: All those in Northern Ireland who have watched channel in last 6 months (base size for each channel in chart).

For viewers in Northern Ireland, trusted and accurate news is the most important attribute of PSB

Figure 21: The top three most important attributes of PSBs in Northern Ireland



Source: Ofcom PSM Tracker, Q27. We now want you to think what you feel is most important for ‘public service broadcasters’. For each set of 5 options, please select the one you feel is most important to society overall, and which would be the least important? Base: All respondents in Northern Ireland who completed online: Total (316)

Among people in Northern Ireland,¹⁵ *'trusted and accurate UK news'* was seen as the most important element of PSB, followed by *'programmes which help me understand what is going on in the world'*, and *'a wide range of different types of programmes, such as drama, comedy, entertainment and sport'*. Those in Northern Ireland place greater importance on regional content than the UK total: *'regional programmes that keep me informed about my area'* and *'programmes that feature Northern Ireland'*¹⁶ both score more highly.

Looking at delivery, *'Programmes made for UK audiences'* (70%), and *'appeals to a wide range of different audiences'* (66%) are seen as being delivered well by PSB overall by viewers in Northern Ireland. This is followed by *'programmes which help me understand what is going on in the world'* (64%) and *'a wide range of different types of programmes, such as drama, comedy, entertainment and sport'* (63%).

Figure 22: Delivery of PSB attributes for PSB channels overall



Source: Ofcom PSM Tracker 2021, Question: Q26. Well (7-10) Summary - How well or badly would you say they provide ...? Base: All those in Northern Ireland who watched PSB channel or service in past 6 months (n=317).

When asked about at individual broadcasters, audiences in Northern Ireland expressed different views about their delivery of the PSB attributes. For BBC TV channels, seven in ten who had watched in the past six months said they delivered well on *'programmes made for UK audiences'* (70%), while two-thirds said the same for *'a wide range of different types of programmes, such as drama, comedy, entertainment or sport'* (67%) and *'programmes that help me understand what is going on in the world'* (68%).

For UTV and ITV channels, just over two-thirds (68%) said it delivered well on *'programmes made for UK audiences'* and *'programmes that feature Northern Ireland'* (67%). For Channel 4 TV channels about three in five (60%) said it delivered well on *'programmes that feature people from different*

¹⁵ This question was asked of all respondents who completed the survey online, excluding those who completed over the telephone.

¹⁶ For respondents in England, the phrasing was *'programmes that feature my region'*, and for Wales *'programmes that feature Wales'*, and for Scotland *'programmes that feature Scotland'*.

backgrounds', 'appeals to a wide range of audiences' (58%) and 'programmes made for UK audiences' (58%). Channel 5 TV channels were seen to deliver well on 'programmes made for UK audiences' (53%) and 'programmes which feature people from different backgrounds' (51%).

Audiences were generally satisfied with the BVoD services provided by PSBs

Seven in ten (71%) respondents in Northern Ireland said they thought it important that PSBs provide catch-up, on-demand or streaming services. The main reason for using BVoD services was to catch up on programming (66%) and the convenience of watching programmes whenever they wanted to (48%). Watching specific programmes or box-sets (39%) and accessing older or archive programming (28%) were also popular reasons. About one in ten (12%) said they used them to watch live television.

BBC iPlayer rated highly: four in five viewers were satisfied with it

Among the BVoD services, four in five (81%) said they were satisfied with BBC iPlayer. This was followed by All4 (76%), ITV Hub (72%) and My5 (65%).¹⁷

Figure 23: Audience satisfaction with selected BVoD services



Source: Ofcom PSM Tracker 2021, Q39. Satisfied Summary - Overall, how satisfied or dissatisfied are you with these TV catch-up, on-demand or streaming services? Base: All those in Northern Ireland who have watched platform in last 6 months (base size for each service in chart).

BBC iPlayer was seen as performing well across a number of attributes for viewers in Northern Ireland; seven in ten said it did well on delivering 'a wide range of different types of programmes, such as drama, comedy, entertainment and sport' (71%) and 'programmes made for UK audiences' (73%). Viewers in Northern Ireland also thought BBC iPlayer delivered well on ease of use; seven in ten said it performed well for 'easy to find something I want to watch' (73%) and 'provides services that are easy to find my way around' (70%).

Viewers in Northern Ireland said that ITV Hub performed well on ease of use; seven in ten said it was 'easy to find something I want to watch' (71%) and 'provides services that are easy to find my way around' (71%). It also delivered well on 'programmes made for UK audiences' (72%).

¹⁷ These figures include satisfaction with the paid-for equivalents All4+ and ITV Hub+.

Northern Ireland content proves popular on iPlayer

Requests for BBC NI content on iPlayer (including co-commissions) doubled between 2020/21 and 2021/22.¹⁸ Among the most-requested programmes were *Hope Street* (a co-commission with BBC Daytime), *BBC Newsline*, *Five Fables* (first broadcast in 2014), *Murder in the Badlands* and *Spotlight*.

All4 performed well on elements related to distinctiveness and creativity. Three in five (63%) said it did well on providing *'programmes that help me see things from a different angle/perspective'* and three in five (60%) said the same for *'programmes that are different in their approach to other providers'*.

For My5, six in ten viewers in Northern Ireland said it delivered well on *'appeal[ing] to a wide range of different audiences'* (61%), *'provides services that are easy to find my way around'* (58%) and *'programmes made for UK audiences'* (57%).

Among those who had not used selected BVoD services in the past six months, the main reason given for not watching them was the content available on them. Other reasons included preferring other services, not being aware of a service or having no access to or difficulty using the service.

***"Doesn't have content that appeals to me."* Woman, 16-24**

***"I record if there is something I want to watch."* Woman, 45-54**

***"I only used them to catch up on tv programmes, I haven't needed to anymore."* Man, 25-34**

¹⁸ Source: BBC Northern Ireland.

TV programming 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 report, users can view financial data in either nominal or 'real' (CPI-adjusted) terms, with users able to easily switch between the two.

Our use of nominal data in the written reports provides a straightforward view of the market in terms commonly used. For those who wish to analyse how inflation has historically affected the value of the industry, the CPI-adjusted series in our interactive report provide an indicative measure.

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 11% increase in spending on first-run content for viewers in Northern Ireland in 2021, with spend on non-news/non-current affairs increasing the most at 22%. Non-news/non-current affairs accounts for the largest share of first-run spend (40%) in Northern Ireland.

BBC hours of first-run content in Northern Ireland dropped by 2% in 2021 to 554 hours. Overall, news content makes up the largest amount 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 2.5% of qualifying network spend on the PSB channels was on Northern Ireland-based productions in 2021.

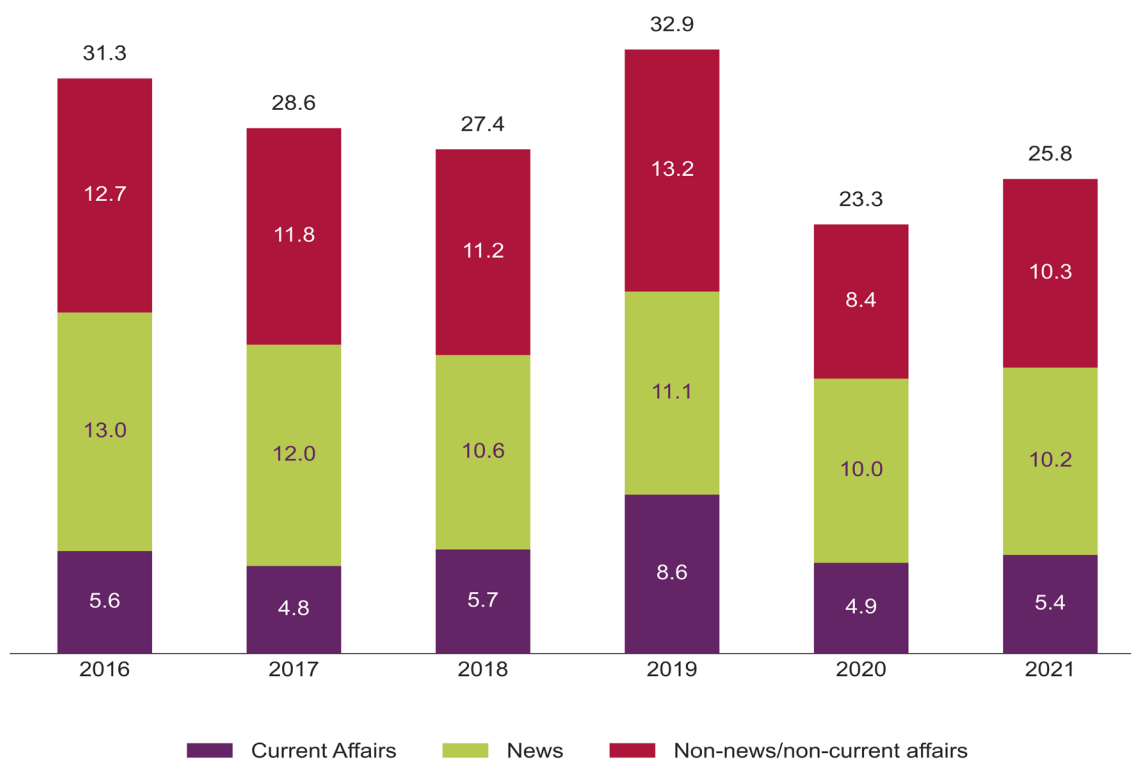
PSB spend on first-run content for Northern Ireland rose across all genres in 2021

There was an 11% increase in spending on first-run content for viewers in Northern Ireland in 2021. Of the total £25.8m spend, the largest share went towards non-news/non-current affairs, at £10.3m; a year-on-year rise of £1.9m.

Non-news/non-current affairs had the largest relative growth in first-run spend, increasing by 22% year on year. PSB spend on news programming for Northern Ireland has increased by 2%.

Despite the growth in investment compared to the Covid-hit 2020, spend on content for Northern Ireland did not reach levels seen before the pandemic. Changes in practices, spurred on by Covid, continued to influence production spend in Northern Ireland: reduced travel and changes in the production companies used resulted in cost savings, particularly in current affairs.

Figure 24: PSB spend on first-run UK-originated content for Northern Ireland, by genre (£m)



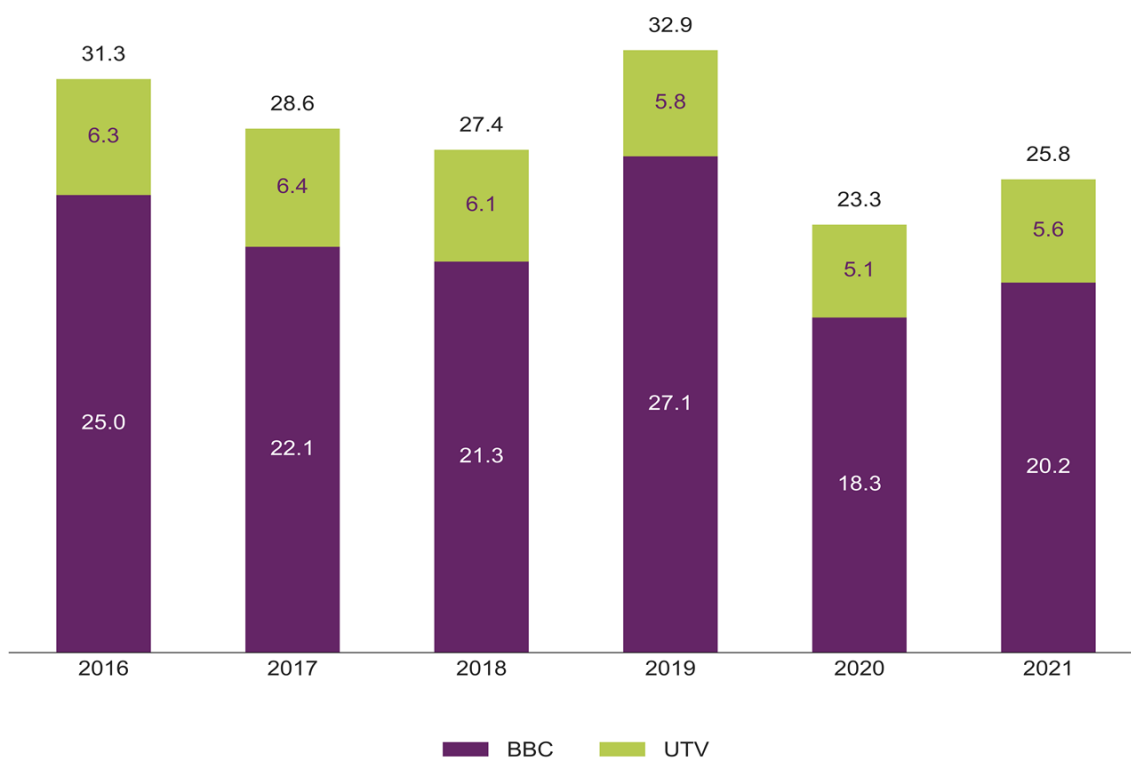
Source: Ofcom/broadcasters.

Both BBC and ITV increased their spend on first-run content for Northern Ireland in 2021

In monetary terms, the increase in spend on first-run content is driven by the BBC, whose spend for Northern Ireland grew £1.9m (10%) since 2020.

ITV had the largest proportional increase in spend on first-run content for Northern Ireland in 2021, at 11%.

Figure 25: BBC and UTV spend on non-network first-run UK-originated content for Northern Ireland (£m)



Source: Ofcom/broadcasters.

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 4 hours of news and 2 hours per week of non-news programming, of which 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:

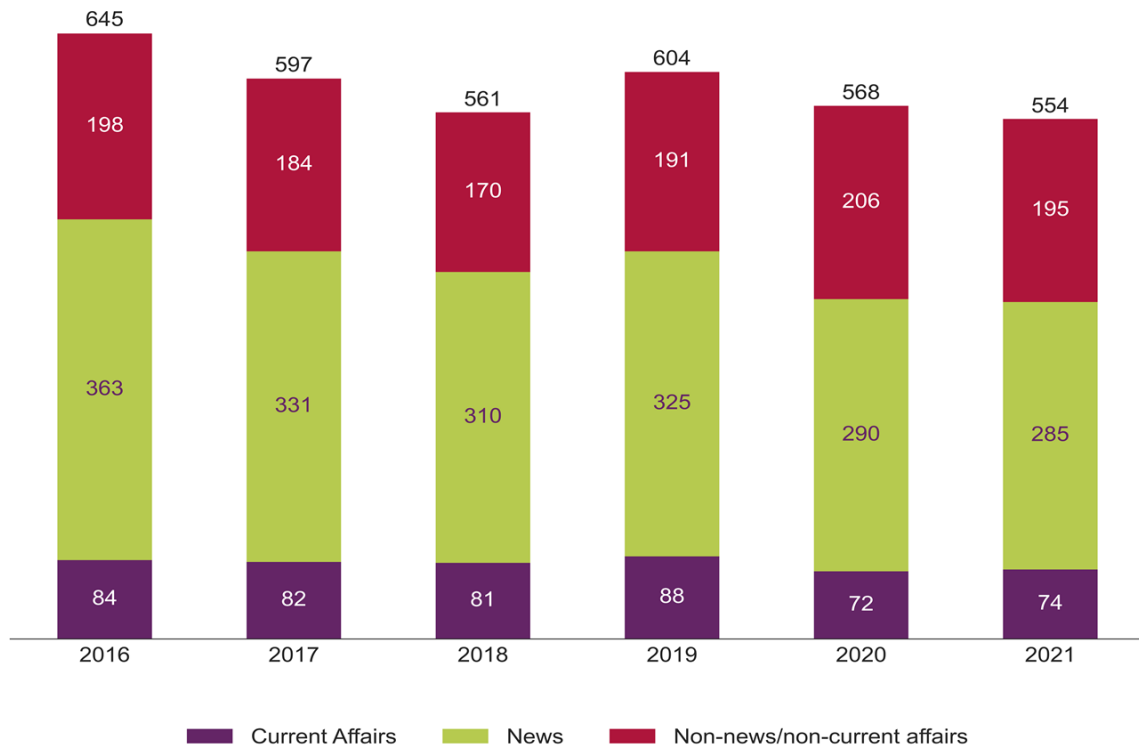
- in respect of BBC One Northern Ireland, at least 310 hours are allocated to news and current affairs programmes, and at least 90 hours are allocated to non-news programmes;
- in respect of BBC Two Northern Ireland, at least 60 hours are allocated to non-news programmes; and
- in respect of BBC One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

BBC hours of first-run content in Northern Ireland dropped by 2% in 2021 to 554 hours

The decline in hours has been driven by news and non-news/non-current affairs. The largest proportional decrease has been for non-news/non-current affairs, dropping by 11 hours to reach 195 hours (down 5 on 2020%).

Overall, news content makes up the largest amount of the BBC’s output for Northern Ireland, comprising 51% of first-run hours. This is unchanged since 2020.

Figure 26: BBC hours of first-run UK-originated content for Northern Ireland, by genre: 2016-2021



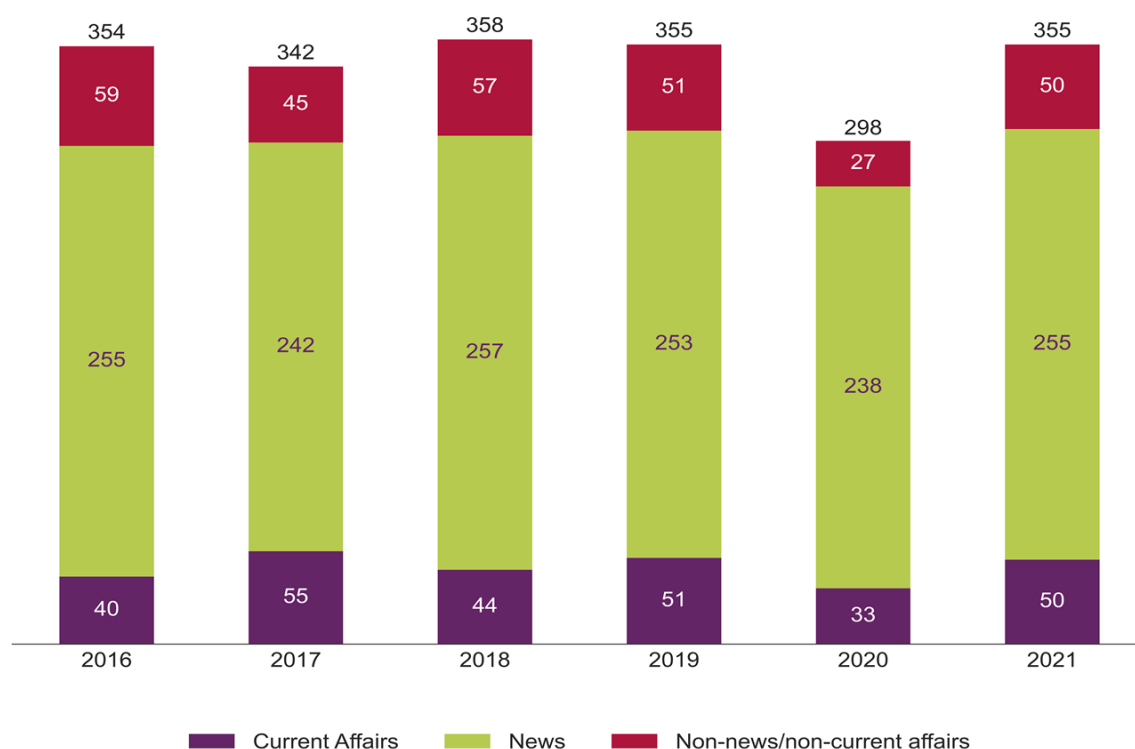
Source: Ofcom/broadcasters.

UTV's hours of first-run content for Northern Ireland grew year on year, with 355 hours of programme output in 2021

The vast majority of UTV output is news content, comprising 72% (255 hours) of first-run programming on the channel.

The increase in hours has been across all genres, returning to 2019 levels following the Covid-led disruption to production in Northern Ireland in 2020. The largest rise has been for non-news/non-current affairs, growing by 23 hours to reach 50 hours (85%).

Figure 27: UTV hours of first-run UK-originated content for Northern Ireland, by genre: 2016-2021



Source: Ofcom/broadcasters.

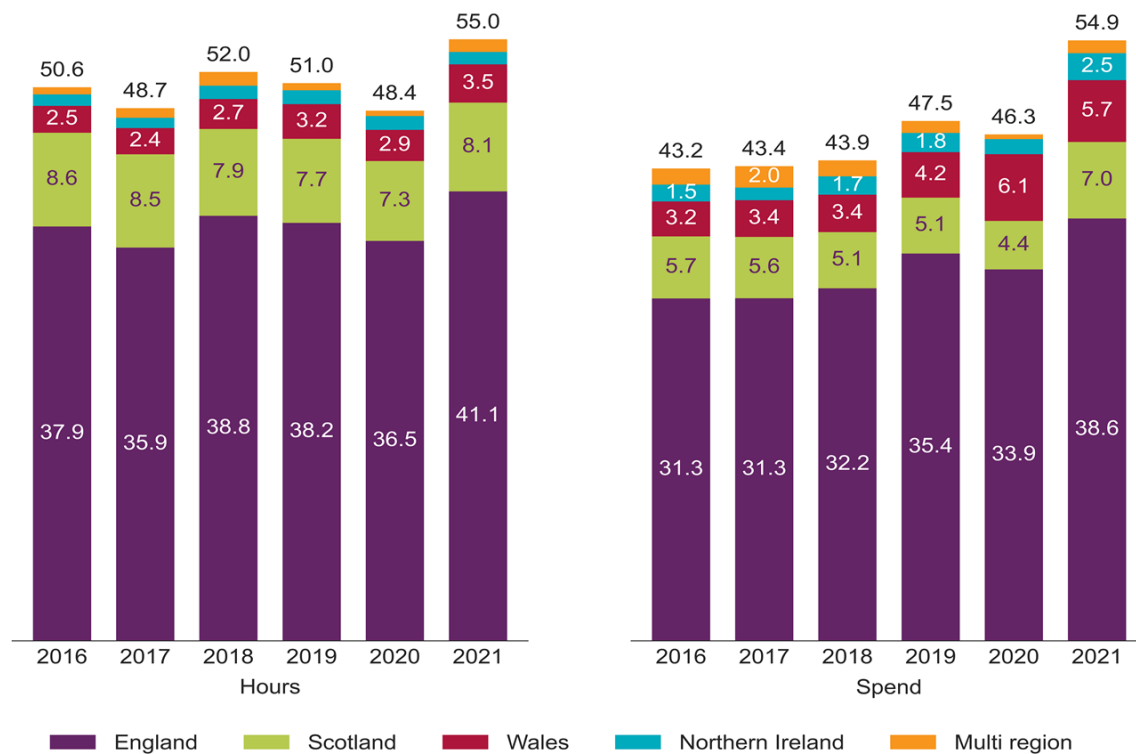
Network content produced in Northern Ireland

The proportion of network spend on first-run content produced in Northern Ireland increased in 2021

Public service broadcasters must make programmes that are to be broadcast for the first time on their network TV channels in a range of locations 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 has an out-of-England quota. ITV and Channel 5 are not specifically required to make content outside England.

Across all the PSBs, 2.5% of qualifying first-run network spend was allocated to programmes qualifying as Northern Ireland productions, as were 1.2% of hours. The proportion of qualifying spend in Northern Ireland is lower than for the other nations but has increased since 2020.

Figure 28: Proportion of qualifying network hours and spend outside London, all PSBs combined: 2016-2021

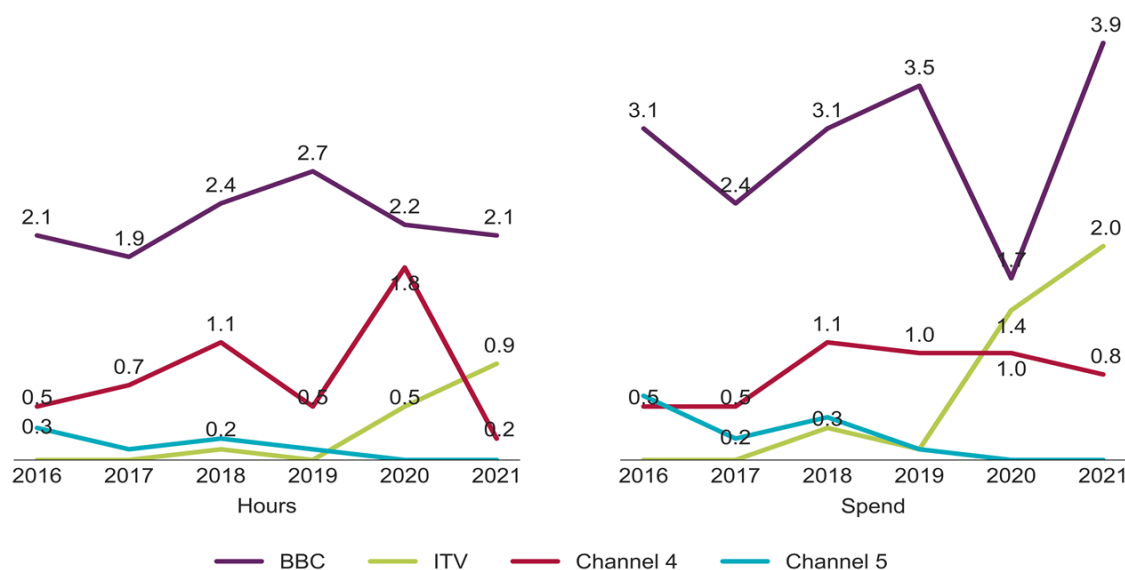


Source: Broadcasters / Ofcom

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

The BBC, which is generally responsible for the majority of qualifying network content made in Northern Ireland, increased the proportion of its network spend in Northern Ireland to 3.9% in 2021, although the proportion of hours fell slightly to 2.1%. This was led by titles such as *Line of Duty*, *Bloodlands* and *Almost Never*.

Figure 29: Proportion of qualifying network production in Northern Ireland, by PSB: 2016-2021



Source: Broadcasters / Ofcom.

Channel 4 initiative to boost Northern Ireland’s independent production sector

Channel 4 and Northern Ireland Screen have entered into a two-year partnership in which the organisations will work together with the aim of supporting and expanding the production sector in Northern Ireland.¹⁹

Channel 4 will undertake a range of initiatives to help drive the growth of independent production and talent development, including More4 Northern Ireland²⁰ – a scheme designed to lead to a new returnable commission for a Northern Ireland-based indie.

The Irish Language Broadcast Fund provided £4.6m in funding in 2021-2022

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.²¹

The ILBF had its budget decreased to £3.9m from £4.9m in 2021-22 when the additional £1m awarded as part of the New Decade New Approach agreement came to an end. Of the current funding, £3,155,000 comes from the UK Government’s Department of Digital, 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.

¹⁹ Channel 4, [Channel 4 and Northern Ireland Screen join forces](#), 16 June 2022.

²⁰ Channel 4, [More4 Northern Ireland Brief](#)

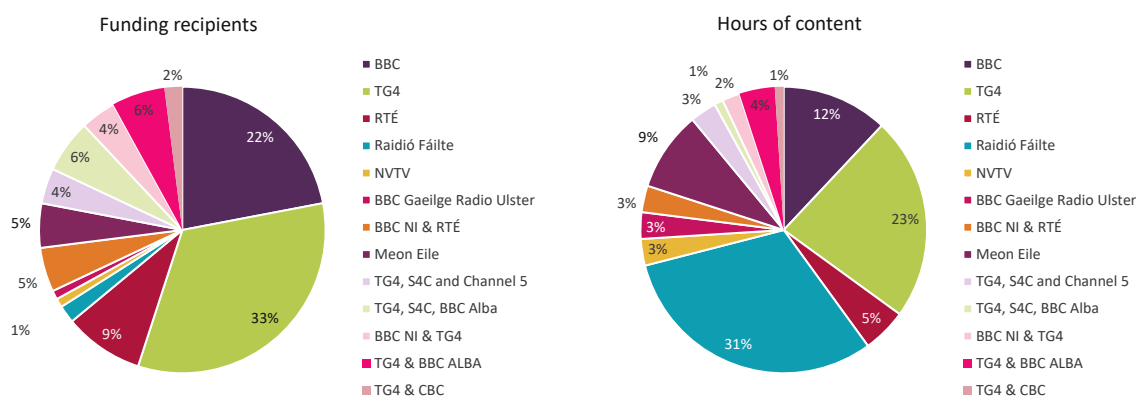
²¹ [Irish Language Broadcast Fund Overview](#).

The ILBF continued to fund a broad range of Irish-language content in 2021/22, for broadcast primarily on TG4, BBC Northern Ireland and RTÉ. The Fund also supported a range of digital and audio content.

Recent programming highlights include Dearcán Media’s documentary on the Pollinator plan *Plean Bee*, which aired on World Bee Day and was critic’s choice across many outlets; Táin Media’s *Seán Ó Riada, Mo Sheanhair*, in which Doireann Glackin explored the life of her iconic grandfather; Sonas Productions’ *Iarnród Enda* on RTÉ, which followed former Taoiseach Enda Kenny as he explored Ireland’s abandoned rail lines, and Doubleband Films’ feature film *Doineann*, which screened at the Belfast Film Festival, the Chicago Irish Film Festival, Newport Beach festival and Capitol Irish Film Festival. It had a cinematic run throughout the country before airing on BBC and TG4 and was nominated at the Celtic Media Festival.

Other notable commissions include LIGID Productions’ *Martin McGuinness:Trodaí, Idirbheartaí, Polaiteoir*, the tenth series of *Below the Radar’s I Lár an Aonaigh* and Waddell Media’s documentary on the much maligned storyteller, *Peig*, all of which received nominations at the Oireachtas Communications Awards 2021, with a win for *I Lár an Aonaigh* presenter Máire Bhreathnach. Big Mountains’ *Peataí!* has been nominated at the RTS NI awards, as has Paper Owl Films’ animated feature *Sol*. *Sol* was also nominated at the Prix Jeunesse International and at the Celtic Media Festival.

Figure 30: ILBF funding recipients / hours: 2021-2022



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 £2m in funding in 2021-22

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

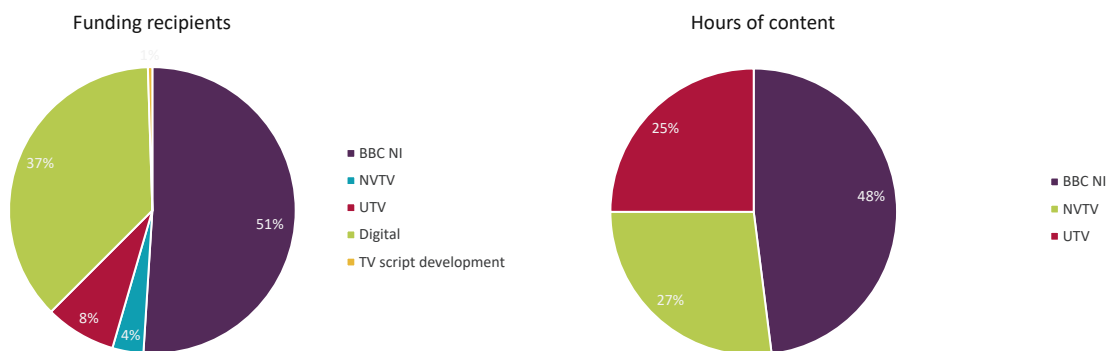
As of 2022-23, the USBF Funding has reverted to the 2020-21 level of £1m. This funding comes from the UK Department for Culture, Media & Sport through the British Film Institute to Northern Ireland Screen, which manages the fund.

Forty-four projects received funding from the Ulster-Scots Broadcast Fund (USBF) in 2021-22. They included 17 digital projects, nine digital language development projects, two television development projects, one radio production (in conjunction with a television production), 14 television productions and two language drama script development projects.

USBF-funded content over the period included factual/entertainment and documentary programming and interactive content. Commissioned highlights include series 2 of 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; *Danders Aroon 2*, 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 two-part series *The Narrow Sea, The Farther Shore* for BBC Northern Ireland and BBC Scotland TV and radio, in which musician Phil Cunningham takes us on a coastal odyssey to create a new composition inspired by the age-old ties between Ulster and Scotland.

Broadcast highlights include the 14-part television travelogue series *Mahon’s Way*, in which presenter Joe Mahon uncovers the history, natural environment and cultural heritage of Northern Ireland, including areas with a particularly strong Ulster-Scots connection.

Figure 31: USBF funding recipients / hours: 2021-2022



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

Radio continues to be popular in Northern Ireland, and alongside TV screen viewing and online activities, continues to account for a considerable amount of time spent on entertainment services. Local radio is particularly important in Northern Ireland, accounting for a much greater market share than across the rest of the UK.

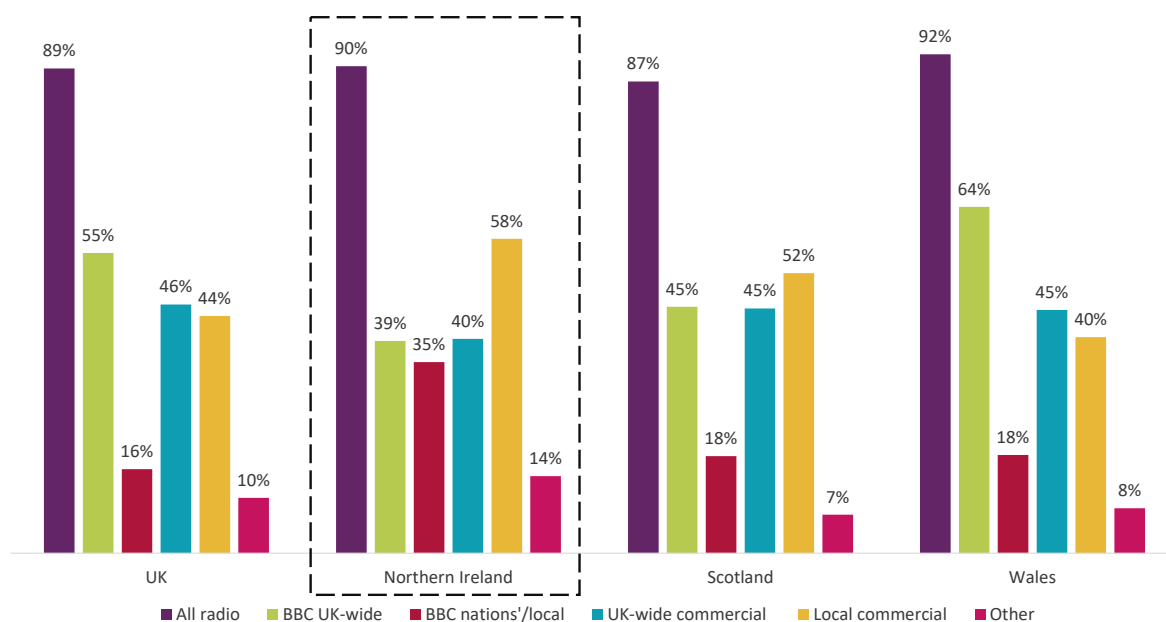
Listening on smart speakers was included for the first time in Q1 2022 RAJAR figures, currently accounting for a relatively small share of listening, at just 6%. This is despite smart speaker ownership levels being higher in Northern Ireland than the UK overall. Analogue radio continues to represent the largest share, accounting for about half of overall listening.

Radio listening in Northern Ireland

Local radio continues to be the most popular radio sector in Northern Ireland

Radio continues to be popular in Northern Ireland: 90% of adults in Q1 2022 said they had listened to the radio in the past week, for an average of 19.8 hours. Figure 32 shows that compared to the other nations, more people listen to the local provision in Northern Ireland: 74% of adults in Northern Ireland listen to local radio (either BBC or commercial) compared to less than 60% across the UK, demonstrating the importance of local in this nation. Listening to any local radio accounts for 58% market share compared to 30% across the UK.

Figure 32: Weekly reach by sector, by nation: Q1 2022



Source: RAJAR Q1 2022; Northern Ireland = BBC Radio Ulster; Scotland = BBC Radio Scotland TSA; Wales = BBC Radio Wales TSA

News and current affairs programmes most popular on BBC Sounds

Requests for BBC Radio Ulster/Foyle content on BBC Sounds increased by 30% between 2020/21 and 2021/22.²² Although BBC Radio Ulster/Foyle’s portfolio of local news and current affairs programmes generates the majority of requests, other programmes such as the true crime strand *Assume Nothing* and *Nolan Investigates: Stonewall* have performed well with UK-wide audiences.

Bauer continues to be the most listened-to commercial group, accounting for almost a third of hours

Bauer owns three local stations in Northern Ireland – Downtown Radio, Cool FM and Downtown Country – which help drive its overall market share to almost a third of all listening. Time spent listening to BBC UK-wide stations does appear to be gradually increasing, although Q Radio has started to lose share.

Figure 33: Share of listening, by radio group: 2021-2022



Source: RAJAR; BBC Radio Ulster TSA

More than a third of adults in Northern Ireland listened to BBC Radio Ulster each week in Q1 2022 – the largest audience for any station

In Northern Ireland, the station with the greatest number of listeners each week is BBC Radio Ulster, which reaches over a third of the adult population. The most listened-to programme is *The Nolan Show* with an average of 337,000 listeners tuning in each week. In Belfast, Cool FM is on a par with BBC Radio Ulster in terms of audience size, although BBC Radio Ulster performs better in market share, accounting for 20% of time spent listening to radio, compared to 13% for Cool FM.

²² Source: BBC Northern Ireland.

Digital listening in Northern Ireland

Coverage of local DAB services in Northern Ireland was unchanged as of March 2022

Coverage of national DAB multiplexes in Northern Ireland has remained constant in recent years. While overall UK local DAB multiplex coverage grew slightly between March 2021 and March 2022, following the launch of local multiplexes in England, coverage for homes in Northern Ireland remained steady at 87.5%

Figure 34: Coverage of DAB services: March 2022

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

Source: Arqiva, BBC, Ofcom.

Figure 35: Top three radio stations, by weekly reach % and region

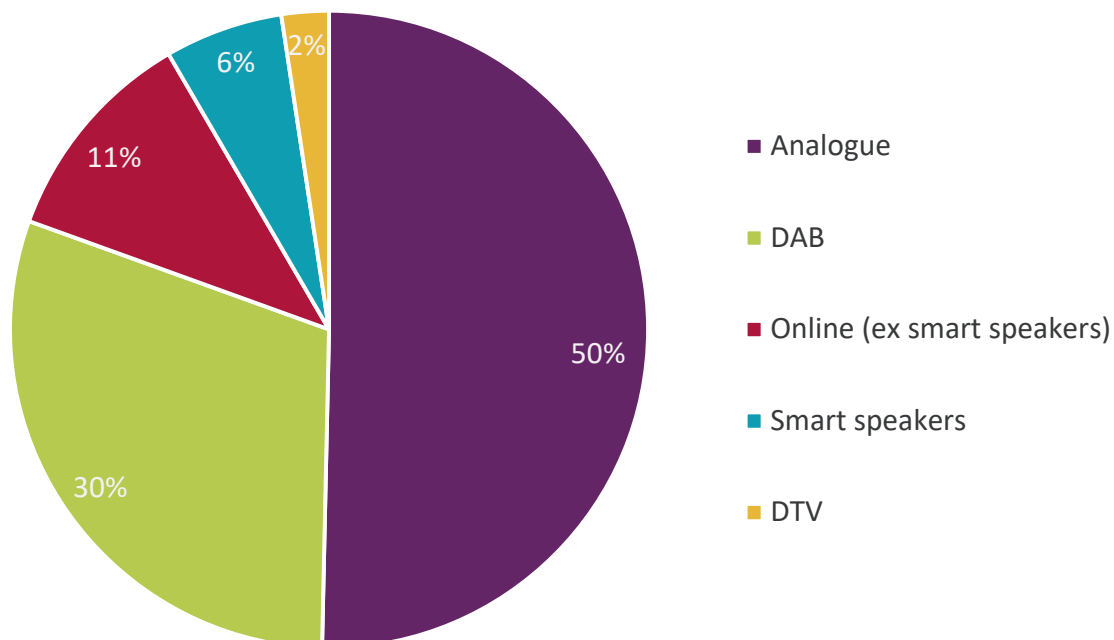
Rank	UK		Northern Ireland*		Belfast**	
	Station	Weekly reach	Station	Weekly reach	Station	Weekly reach
1	BBC Radio 2	26.2%	BBC Radio Ulster	34.3%	Cool FM	31.8%
2	BBC Radio 4	19.0%	Cool FM	28.6%	BBC Radio Ulster	31.1%
3	Heart Network	14.7%	Downtown Radio	18.5%	U105 (Greater Belfast)	21.5%

Source: RAJAR Q1 2022; *BBC Radio Ulster TSA; **U105(Greater Belfast) TSA.

About 6% of listening to the radio is now done through smart speakers

Listening to radio through an analogue platform (FM/AM) accounted for about half of all Northern Ireland listening in Q1 2022. Listening on smart speakers was included for the first time in Q1 2022 and accounted for 6% of listening. Northern Ireland DAB ownership continues to be below the UK average, with 56% of adults owning one compared to 66% across the UK as a whole; the proportion of listening using DAB was 30% in Q1 2022.

Figure 36: Share of listening, by platform



Source: RAJAR Q1 2022; BBC Radio Ulster TSA.

Audio trends

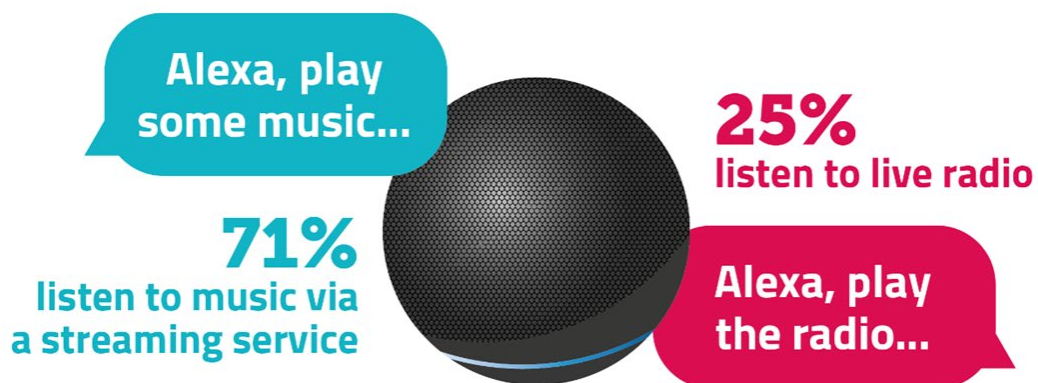
People in Northern Ireland are more likely to have a smart speaker

Among people aged 16+ in Northern Ireland, 49% said they had a smart speaker in their home, considerably higher than in the UK as a whole (39%). The Amazon Echo is by far the most popular type (found in 84% of homes which own the device), followed by Google Home/Google Nest (16%).

How people in Northern Ireland use their smart speaker is quite different to the UK as a whole

Listening to music via a streaming service (71%) is by far the most popular activity conducted on a smart speaker. People in Northern Ireland who have a smart speaker in their household are significantly more likely than people in the UK as a whole to use their device for music streaming (61%). On the other hand, they are less likely to use the device for radio (25% vs 59%). People in Northern Ireland are also less likely to use their device for most other activities, including listening to podcasts, catch-up radio, news, weather reports or travel updates, among other activities.

Figure 37: Smart speaker use in Northern Ireland

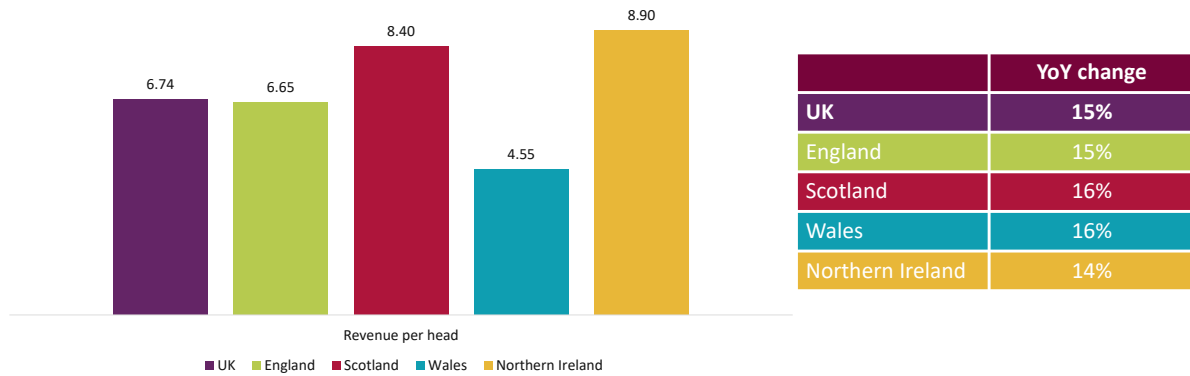


Source: Ofcom Technology Tracker 2022.

Per-capita commercial radio revenue in Northern Ireland grew by 14% between 2020 and 2021

In 2021, per-capita commercial radio revenue in Northern Ireland was £8.90, an increase of 14% on the previous year.

Figure 38: Per-capita commercial radio revenue, by UK nation: 2021 (£)



Source: Broadcaster returns, Ofcom analysis. NB: These figures solely relate to relevant turnover reported against AL licences (local analogue commercial) and include local and national revenues and sponsorship i.e. it is not just revenues which relate to adverts aimed at the specific nation. As mid-year 2021 population estimates for were not available at the time of publication, 2020 mid-year population data has been used for both 2020 and 2021.