



Northern Ireland  
Assembly

## Research and Information Service Briefing Note

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# Internet/broadband provision in rural Northern Ireland

## 1 Introduction

This briefing provides outline information on the level of internet and more specifically broadband provision within Northern Ireland (NI) as a whole, and also provides some rural specific analysis of the data.

All references to 'rural' within this briefing note relate to the OFCOM NI definition of areas with populations of less than 2,000 people.

## 2 Provision

Ofcom's Connected Nations report 2015 provides a snapshot of broadband provision within Northern Ireland, and enables comparisons with the UK as a whole. Table 1 provides a summary of the data contained in this report.

The data shows provision in NI lags behind the UK as a whole in a number of key areas. The proportion of premises with access to broadband at speeds above 2, 5 and 10 megabits per second (Mbps) is lower in NI than the UK as a whole. Similarly, the proportion of premises with access to superfast broadband (defined as broadband

offering speeds of 30Mbps or more) in NI is lower than the UK as a whole. Average download speeds are slightly lower in NI than the UK as a whole.

Looking at the NI data in isolation, it is evident that access to broadband services does not mean take-up of those services. For example, although 94% of NI premises have access to broadband coverage of at least 2Mbps, only 69% of residential premises have chosen to avail of broadband services (a smaller proportion than the UK as a whole where take-up is 78%). Similarly, whilst superfast broadband is available to 77% of premises, only 38% of premises have taken-up the service.

Table 1: Fixed broadband in Northern Ireland<sup>1</sup>

Fixed broadband networks	NI	UK
Coverage of broadband faster than:	-	-
2 Mbps (% of premises)	94%	98%
5 Mbps (% of premises)	91%	96%
10 Mbps (% of premises)	86%	91%
Coverage of Next Generation Access (% of premises)	95%	90%
Superfast broadband coverage (% of premises)	77%	83%
Superfast broadband coverage rural areas (% of premises)	40%	37%
Fixed broadband take-up (% of residential premises)	69%	78%
Broadband take-up fixed and mobile (% of premises)	72%	80%
Superfast broadband take-up (% of premises)	38%	33%
Average broadband download speed	28.3 Mbps	29Mbps
Average broadband upload speed	4.5 Mbps	3.5Mbps
Average broadband download speed urban areas	32.5 Mbps	31.3Mbps
Average broadband download speed rural areas	18 Mbps	11.6Mbps
Premises that could receive less than 2Mbps	5.70%	1.80%
Average monthly data usage	76.8GB	82.3GB

Data on superfast broadband provision amongst small and medium sized enterprises (SMEs) is outlined in Table 2 below. This data shows proportionate access to superfast broadband is lower amongst microbusiness (defined as having fewer than 10 employees<sup>2</sup>) than either small (defined as having between 11 to 50 employees<sup>3</sup>) or medium sized companies (defined as having between 51 and 250 employees<sup>4</sup>).

<sup>1</sup> Ofcom, Connected Nations Report 2015

<http://stakeholders.ofcom.org.uk/binaries/research/infrastructure/2015/downloads/NIreland.pdf>

<sup>2</sup> Eurlex, Summary of: Commission Recommendation – the definition of small and medium enterprise, Micro, small and medium-sized enterprise: definition and scope (January 2016) <http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=URISERV%3An26026>

<sup>3</sup> *Ibid*

<sup>4</sup> *Ibid*

Table 2: SME access to superfast broadband<sup>5</sup>

Business Size	% of businesses
SMEs with 1 or more employees	69%
Micro business	67%
Small businesses	74%
Medium businesses	74%

Figure 1 shows the proportion of premises unable to access download speeds greater than 10Mbps in each NI council area. The data shows that whilst only 1% of premises in Belfast are unable to access to download speeds of 10Mbps or more, this rises to 37% in the Fermanagh and Omagh council area.

Figure 1: Proportion of premises unable to access download speeds of greater than 10Mbps by council<sup>6</sup>

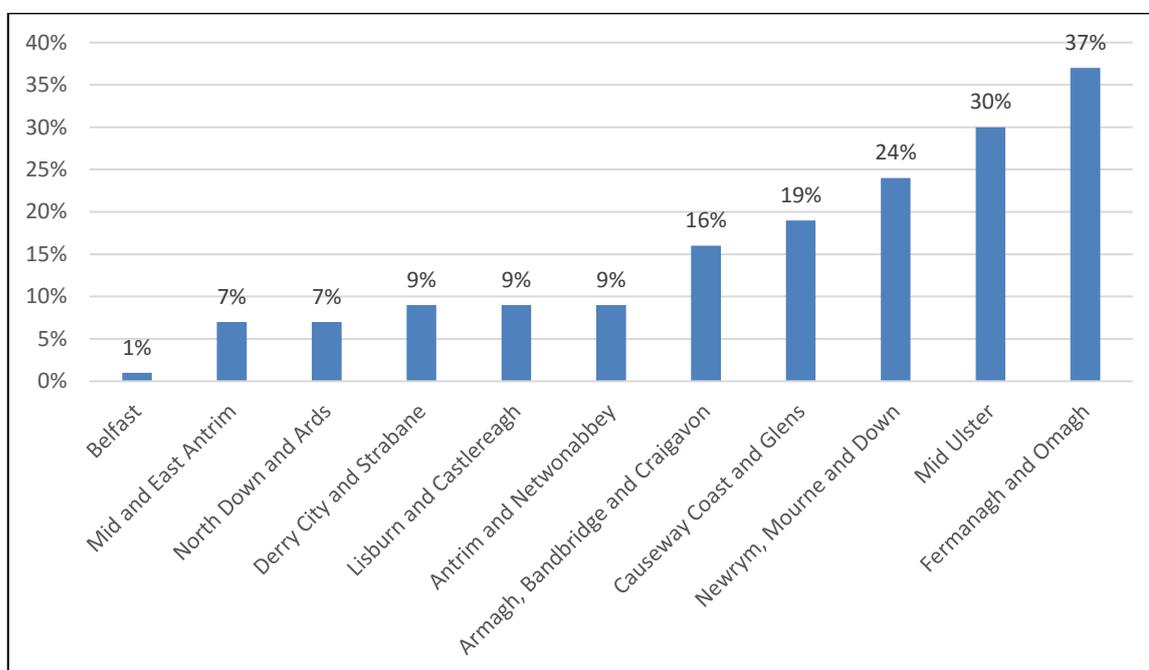


Table 3, below, provides details of 3G and 4G data access in NI, and includes comparisons to the UK as a whole. The table shows NI to be lagging behind the UK on a number of measures. The proportion of premises to have indoor and outdoor data coverage from the all four major mobile operators (EE, Three, O2 and Vodafone). The number of indoor and outdoor premises defined as complete data not-spots, that is areas that do not receive coverage from any operator, is greater in NI than in the UK.

NI has a lower proportion of geographic data ‘not-spots’ and a greater proportion of its geographic area receiving data coverage from all four operators than the UK as a

<sup>5</sup> Ofcom, Connected Nations Report 2015

<http://stakeholders.ofcom.org.uk/binaries/research/infrastructure/2015/downloads/NIreland.pdf>

<sup>6</sup> *Ibid*

whole. Geographic not coverage refers to the proportion of an area's landmass not receiving coverage – 7% in NI and 21% in the UK as a whole.<sup>7</sup>

Table 3: Snapshot of mobile data services in Northern Ireland - 2015<sup>8</sup>

Measure	NI	UK
Indoor data coverage by all four operators (% of premises)	57%	77%
Outdoor data coverage by all four operators (% of premises)	73%	88%
Indoor data complete not-spots	5%	3%
Outdoor data complete non-spots	1%	<1%
Geographic data coverage by all four operators	43%	13%
Geographic data complete not spots	7%	21%

### 3 Rural specific issues

There is evidence of a rural/urban digital divide in both NI. This divide is evident in both the coverage and speeds in rural areas. In NI, only 40% of rural premises have access to superfast broadband, compared to 77% of premises across the region as a whole.

This urban/rural disparity in coverage is not confined to superfast broadband. Figure 2, below, shows the proportion of premises that can receive 2,5 and 10Mbps broadband in NI as a whole and compares that to provision in rural and urban areas. Across all three measures, the proportion of premises receiving these speeds is significantly lower in rural areas than urban. Furthermore, as shown in Table 1, average download speeds in urban areas of NI are 32.5Mbps, in rural areas average download speed is 18Mbps.

Whilst there are issues in terms of broadband coverage and speed within rural Northern Ireland, the data in figure 3 reveals that rural households have comparable access to the internet at home as their urban equivalent. The most recent data from 2016 actually reveals that a greater proportion of rural households have internet access than either Northern Ireland as a whole or urban households in particular.

It should also be stated that compared to rural areas in the UK as a whole rural Northern Ireland has faster average broadband download speeds (see table 1). Furthermore, with regard to mobile internet access, Northern Ireland has a lower level of geographic data 'not spots' as compared to the rest of the UK, which theoretically increases the potential of mobile internet usage within rural areas (see table 3).

<sup>7</sup> *Ibid*

<sup>8</sup> *Ibid*

Figure 2: Urban/rural split in broadband speeds in Northern Ireland<sup>9</sup>

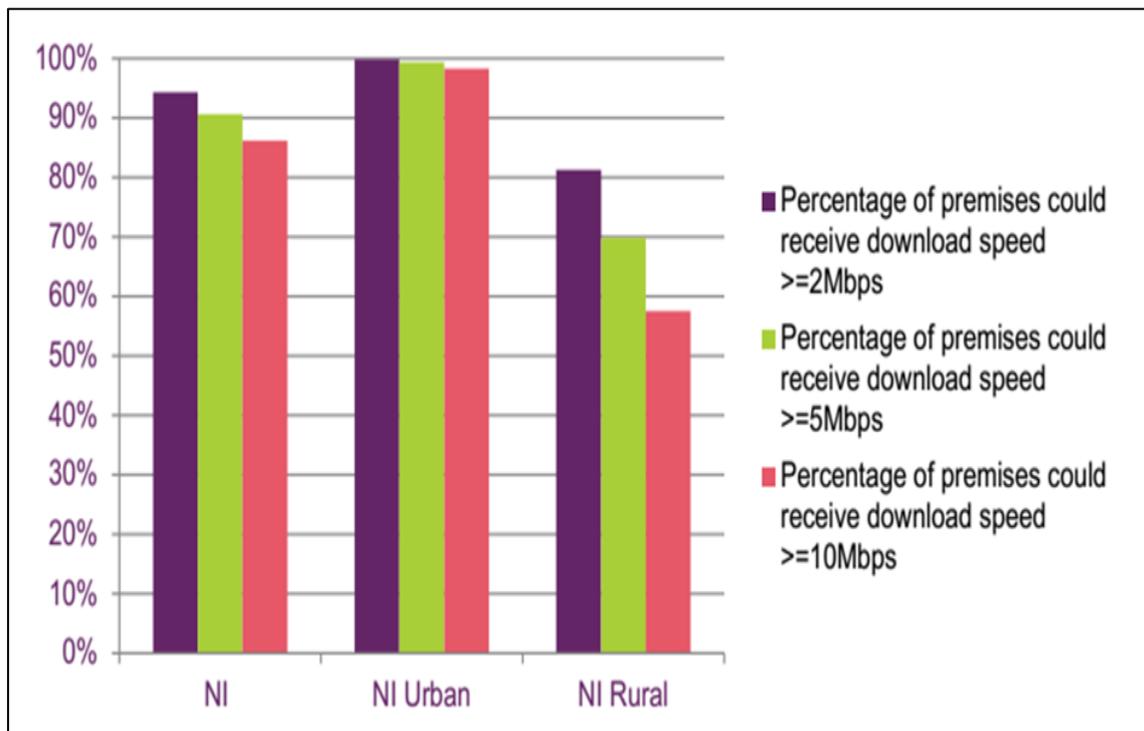
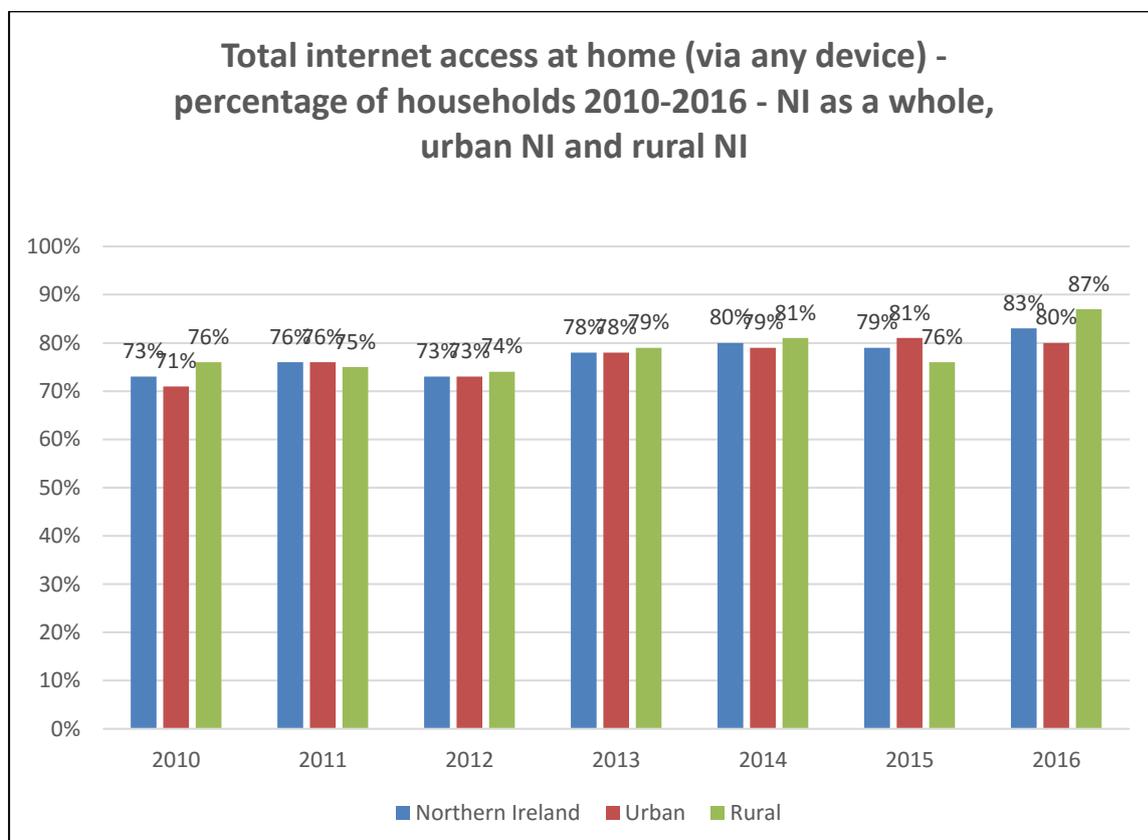


Figure 3: Total internet access at home – percentage of NI households 2010-16<sup>10</sup>



<sup>9</sup> Ibid

<sup>10</sup> Derived from [Communications Market Reports, OFCOM website, 3 October 2016](#)