

3 Radio and audio content

3.1 Recent developments in Northern Ireland

DAB boost

In April 2013 Ofcom approved a request from national DAB transmission operator Digital One to extend coverage to Northern Ireland. The move will enable radio services including Planet Rock, Absolute Radio, Absolute 80s, Absolute 90s, Jazz FM, Smooth Radio and Smooth 70s to be available on DAB digital radio in Northern Ireland for the first time.

Digital One, which already operates in England, Scotland, and Wales, has built a network of six transmitters across Northern Ireland (Divis, Carnmoney Hill, Londonderry, Brougher Mountain, Strabane and Limavady) providing coverage to around 75% of households. The new services are due to come online in summer 2013.

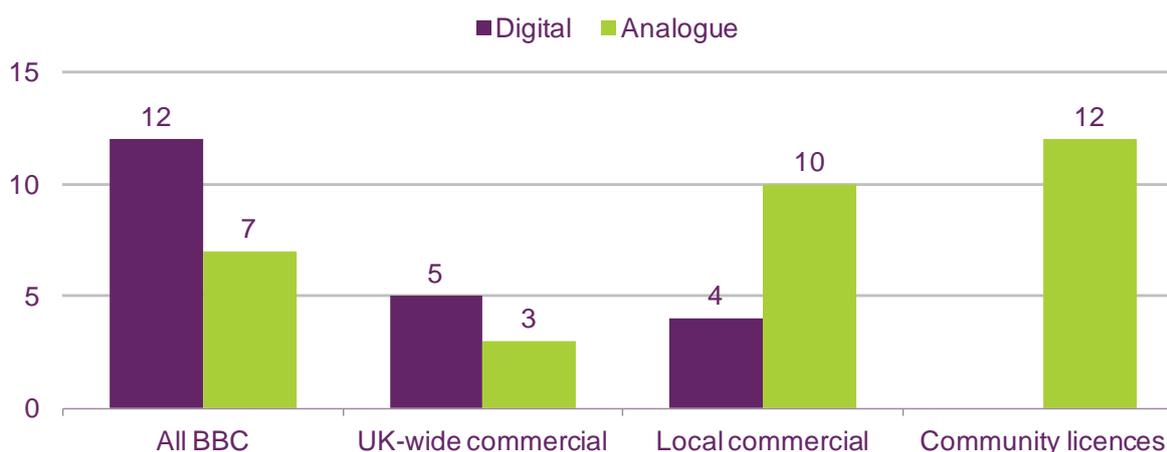
The coverage area of the new Digital One service is likely to improve in the coming years, in line with the UK government's radio switchover policy, as set out in its Digital Radio Action Plan.

3.2 Radio service availability

Listeners in Northern Ireland have access to at least 53 radio services

In terms of quantity, local commercial and community stations account for 40% of the total number of services available in Northern Ireland. However, most do not have universal coverage throughout Northern Ireland. The range of DAB services has been lower due to restricted digital multiplex availability (see above). Listeners in many parts of Northern Ireland can receive broadcast radio signals from the Republic of Ireland, which increases radio station availability to more than 53.

Figure 3.1 Radio station availability in Northern Ireland



Source: Ofcom, April 2013 Note: This chart shows the maximum number of UK radio services available in Northern Ireland; local variations along with reception constraints mean that listeners may not be able to access all of these

3.3 Community radio broadcasting

2013 licence awards

Ofcom received ten applications for community radio services in Northern Ireland. Five awards were made in June 2013, including the first Ulster-Scots station and the first Irish-language station outside Belfast.

Belfast FM (Belfast FM Limited)	Belfast
Raidió G (Raidió G Teo)	Maghera, County Derry
Bridge FM (Portadown Community Radio Limited),	Portadown
Chaine FM (Larne Community Media Limited),	Borough of Larne
fUse FM (Ullans Speakers Association)	Ballymoney

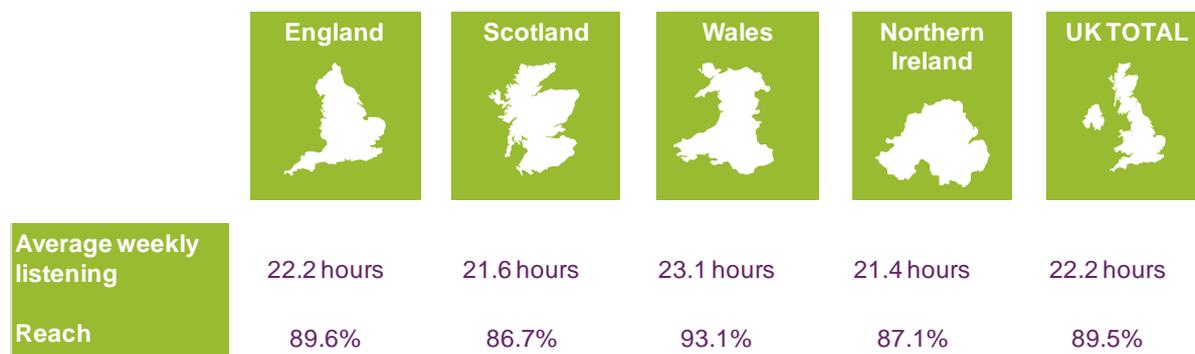
There are 12 community radio stations currently on air in Northern Ireland.

3.4 Patterns of listening to audio content

The reach of radio in Northern Ireland is lower than the UK average

Among adults in Northern Ireland, radio services reached 87.1% of the adult population, 2.4 percentage points lower than the UK average of 89.5%. Listeners in Northern Ireland spent an average of 21.4 hours each week listening to the radio in 2012, again lower than the UK average. (Figure 3.2) This represents a decline of 5% in the total number of radio listeners, with time spent listening falling by 54 minutes over a typical week.

Figure 3.2 Average weekly reach and listening hours: 2012



Source: RAJAR, All adults (15+), year ended Q4 2012. Reach is defined as a percentage of the area adult population who listen to a station for at least five minutes in the course of an average week.

Listeners in Northern Ireland prefer to listen to local services

Over half (58%) of all listening in Northern Ireland is to local/nations services, higher than in any other nation. Local commercial stations are the most popular; over a third (36%) of all listening in Northern Ireland in 2012 was to these stations. BBC local/nations services were also popular; BBC Radio Ulster and Radio Foyle accounted for 22% of all listening hours in Northern Ireland, a higher share for this sector than in Wales and Scotland.

Listening to the BBC network stations and UK-wide commercial stations in Northern Ireland is the lowest across all of the UK nations and lower than the UK average. Northern Ireland also has the highest proportion of listening to 'Other' (10%). This is thought to be cross-border listening to the stations from the Republic of Ireland and listening to community radio stations, neither of which appear in RAJAR. (Figure 3.3)

Figure 3.3 Share of listening hours, by nation: 2012

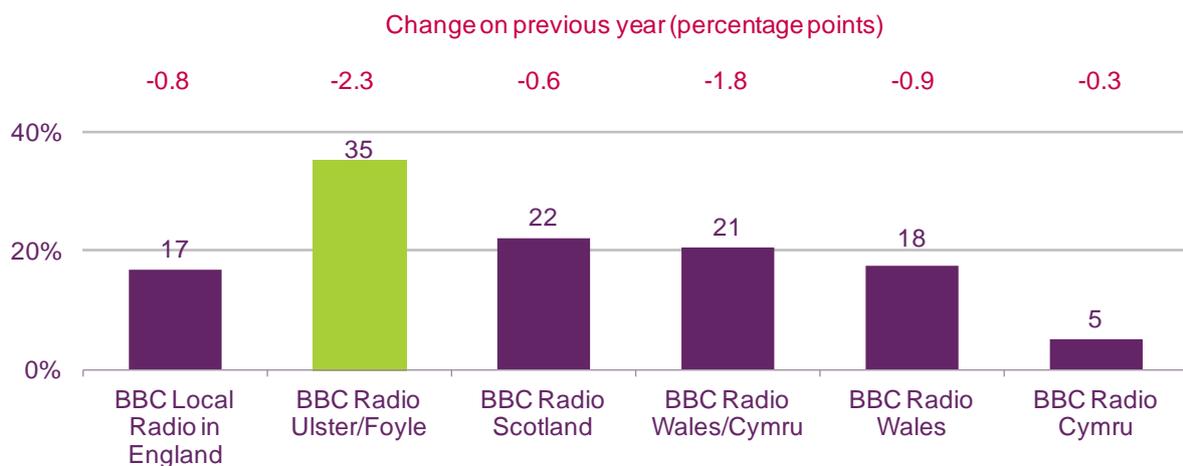


Source: RAJAR, All adults (15+), year ended Q4 2012

BBC stations Radio Ulster and Foyle are more popular in Northern Ireland than BBC nations stations in Wales and Scotland

Over one-third (35%) of adults listened to BBC Radio Ulster/Foyle in an average week in 2012; the highest reach of any of the BBC local or nations services. However, the proportion of adults listening to BBC Radio Ulster/Foyle fell by 2.3 percentage points year on year. Although listening to BBC nations and local services fell across all the UK nations, the largest fall was in Northern Ireland.

Figure 3.4 Weekly reach for BBC nations/local services



Source: RAJAR, All adults (15+), year ended Q4 2012

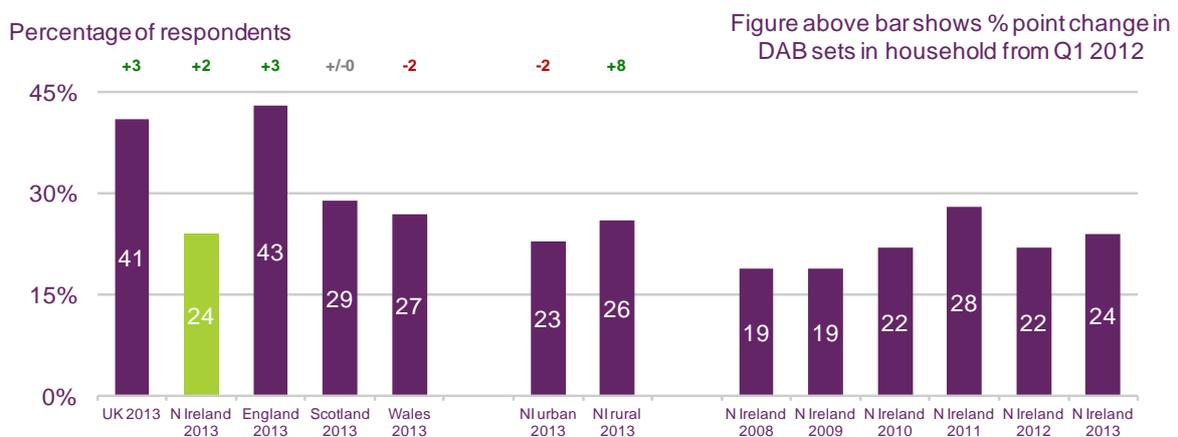
3.5 Digital radio set ownership and listening

A quarter of households in Northern Ireland have at least one DAB radio set

According to Ofcom research, four in ten UK households had access to a DAB radio set in the home in Q1 2013; a slight increase on the previous year's figure (38%). But take-up varies significantly across the UK; it is far higher in England (at 43%) than in the other UK nations.

Figure 3.5 shows that take-up of DAB sets remains lowest in Northern Ireland, where a quarter of households have at least one of these sets in the home (24%). The low level of take-up in Northern Ireland reflects the more limited choice of digital radio stations, both digital-only and analogue services on DAB, than in England.

Figure 3.5 Ownership of DAB radios among radio listeners



Source: Ofcom research, Q1 2013

Q4. You said earlier that you have (NUMBER) radio sets in your home that someone in the household listens to in most weeks. How many of these radio sets are digital radios?

Source: Ofcom research, Q1 2013

Base: Adults aged 16+ who listen to radio (n = 2910 UK, 405 Northern Ireland, 1747 England, 375 Scotland, 383 Wales, 197 Northern Ireland urban, 208 Northern Ireland rural, 539 Northern Ireland 2008, 569 Northern Ireland 2009, 653 Northern Ireland 2010, 428 Northern Ireland 2011, 404 Northern Ireland 2012, 405 Northern Ireland 2013)

Note: Remaining percentages are Don't know responses.

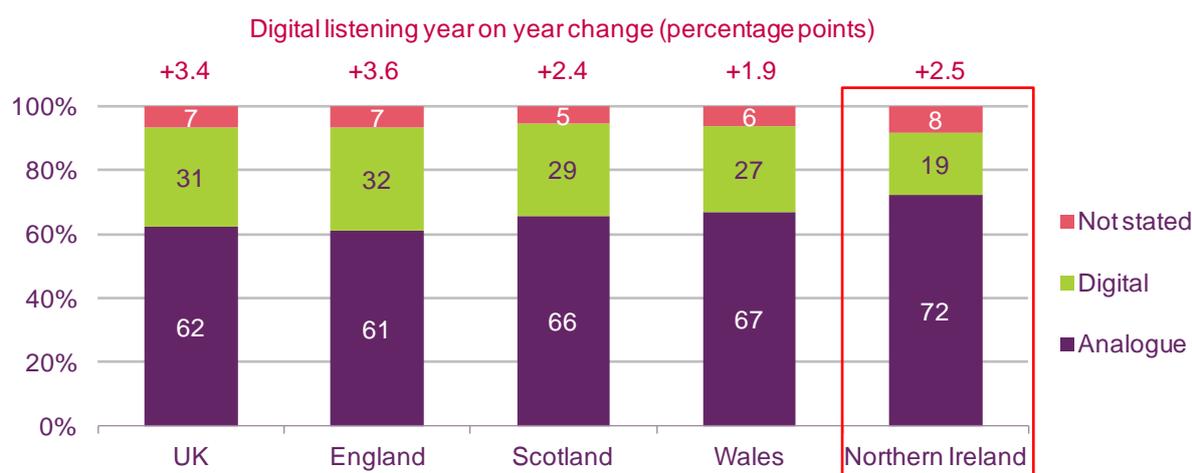
NB. Data in 2011 based on those who listen to radio and have any radio sets in the household that someone listens to in most weeks.

The proportion listening through a digital platform is lowest in Northern Ireland

Alongside the lower take-up of DAB sets in Northern Ireland, the proportion of listening through a digital platform was also the lowest of the UK nations (19%). Although the digital listening shown in Figure 3.6 includes listening via digital television and online, the majority of digital listening is via a DAB set, so it is not surprising that lower DAB radio take-up is reflected in a lower proportion of digital listening.

The proportion of listening through a digital platform in Northern Ireland grew by 2.5 percentage points in 2012; less than the UK average, but greater than in Wales and Scotland.

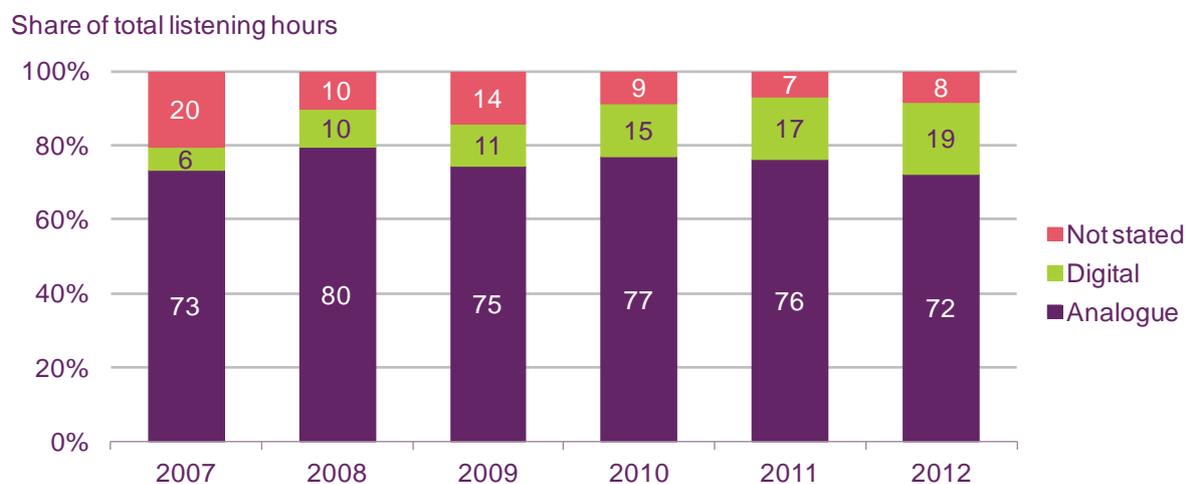
Figure 3.6 Share of listening hours via digital and analogue platforms: 2012



Source: RAJAR, All adults (15+), year ended Q4 2012

The share of digital listening since 2007 has grown steadily. While the fall in ‘not stated’ over six years reflects a change in RAJAR methodology, the underlying trend is still evident. Starting from a lower base, digital listening share has grown by 13pp over the past five years. Analogue listening remains strong in Northern Ireland at 72%; a fall of 5pp between 2010 and 2012.

Figure 3.7 Share of listening hours via digital and analogue platforms in Northern Ireland: 2007 - 2012



Source: RAJAR, All adults (15+), calendar years 2007 - 2012

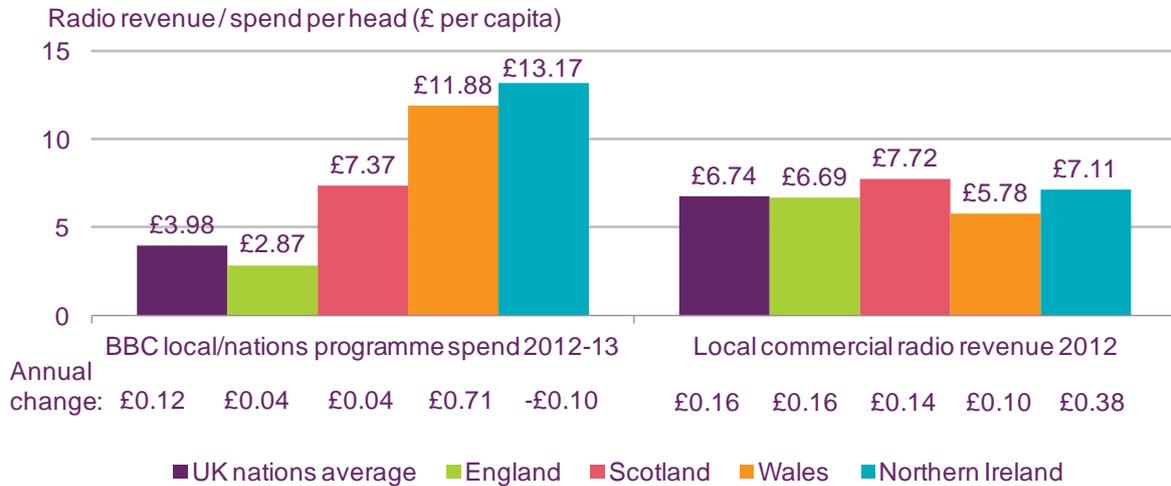
3.6 The radio industry

BBC spend on radio per head of population was highest in Northern Ireland

Although the amount spent by the BBC on BBC Radio Ulster/Foyle in 2012-13 remained the same as in 2011-12 at £23.8m, spend per head declined by £0.10. This is due to a slight increase in the population size of Northern Ireland. BBC spend per head in Northern Ireland is the highest of all of the UK nations.

The commercial revenues generated by local commercial radio stations in Northern Ireland reached £12.9m in 2012. Adjusting for population size, Northern Ireland has the second highest revenue per head of the UK nations, at £7.11. Local commercial radio revenues in 2012 grew more than in any other nation in 2012, improving by £0.38 or 5.6% (Figure 3.8)

Figure 3.8 Local/nations radio spend and revenue per head of population: 2012-13



Source: Broadcasters

Note: The UK total shows the average for local commercial radio across the four nations and therefore excludes revenues for the UK-wide commercial stations: Classic FM, talkSPORT and Absolute.