

## 3 Radio and audio content

### 3.1 Recent developments in Northern Ireland

#### **DAB coverage in Northern Ireland is increasing**

DAB coverage across the UK is set to be expanded after an agreement between industry and the Government. The agreement will see coverage of the Northern Ireland local DAB multiplex increase from 79% of households and 81% of roads to 86% of households and 89% of roads. The improvements are due to be completed by Q2 2016.

The local DAB multiplex in Northern Ireland carries Cool FM, Downtown, Downtown Country, Citybeat, BBC Radio Ulster and BBC Radio Foyle (from May 2015).

The expansion of local DAB coverage is separate to the ongoing BBC drive to boost its national DAB radio coverage by the end of this year, and other plans to increase capacity and coverage for national commercial radio on DAB.

A second national commercial digital radio multiplex that will deliver 14 digital stations (nine of which are new) to listeners across the UK is to launch next year. The new digital radio multiplex will be run by Sound Digital, a consortium of Arqiva, Bauer, and UTV Media GB.

The multiplex (which is the transmission infrastructure used to deliver these services) will carry new services including Jazz FM, Magic Mellow, and British Muslim Radio.

The service will also carry new UTV Media-owned-and-run services: talkRADIO, talkSPORT 2, and talkBUSINESS. UTV will also return Virgin Radio to the airwaves, having signed a 12-year licensing agreement with the Virgin Group.

Coverage from the new multiplex will be more limited than others: BBC National; Digital One; and local DAB. UK-wide indoor coverage will reach 72% of the population. In Northern Ireland, the figure will be 62%, possibly increasing to 66%, subject to international agreement.

#### **Northern Ireland now has its own local DAB-only service**

Downtown Country, a new digital-only Country and Western station, started broadcasting in Northern Ireland in April 2015. The spin-off station from Bauer NI-owned Downtown Radio is the region's first digital-only station, broadcasting on DAB and online.

#### **Consolidation in the Northern Ireland radio sector**

The Q Radio Network, which operates six small stations across Northern Ireland, has bought Belfast-based Citybeat. The takeover means there are now three main commercial radio players in the Northern Ireland market: Bauer NI (Cool FM, Downtown, and Downtown Country); U105 (owned by UTV Media); and the Q Network.

#### **New community radio stations go live**

Three new community radio stations have gone on air in Northern Ireland, joining 11 existing stations. They are:

- Belfast FM - targeted at listeners over 55 in the Belfast City area

- ABC FM – aimed at listeners in the Portadown area; and
- fUse FM – which will reflect Ulster-Scots language and culture, and broadcasting in the Ballymoney area.

Two other licences were awarded as part of the same round of Community Radio licensing. Chainé FM (Larne) and Raidió G (Maghera) decided not to take up the licences offered.

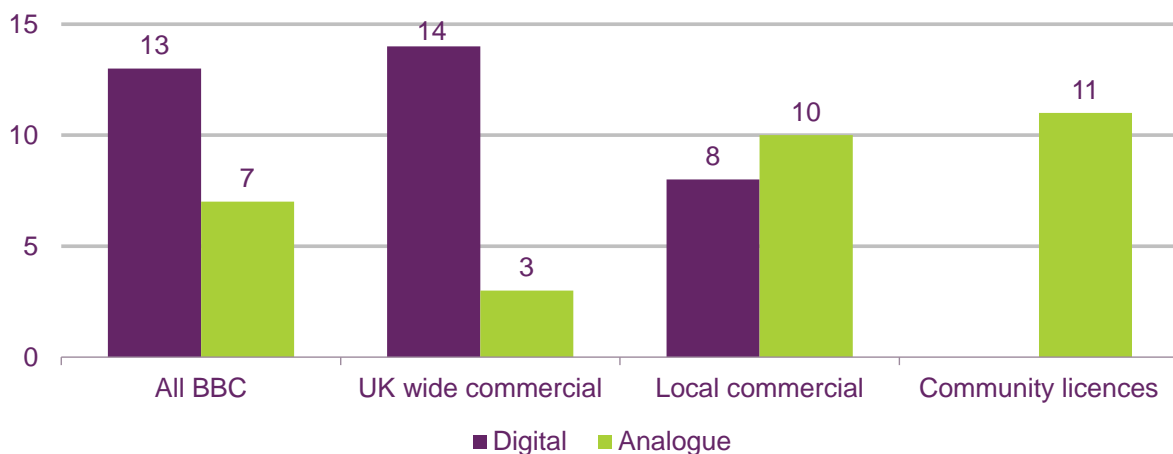
### 3.2 Radio station availability

#### There are 35 DAB digital radio stations in Northern Ireland

Listeners in Northern Ireland have access to 35 stations broadcasting on DAB. This includes 13 BBC digital stations, 14 UK-wide commercial stations broadcasting on the Digital One multiplex and eight stations on the local commercial multiplex.

The number of stations available on the local commercial multiplex has increased with the addition of some of Bauer and Absolute’s existing digital-only brands, and the launch of a new digital-only station, Downtown Country.

**Figure 3.1 Radio station availability**



Source: Ofcom, May 2015

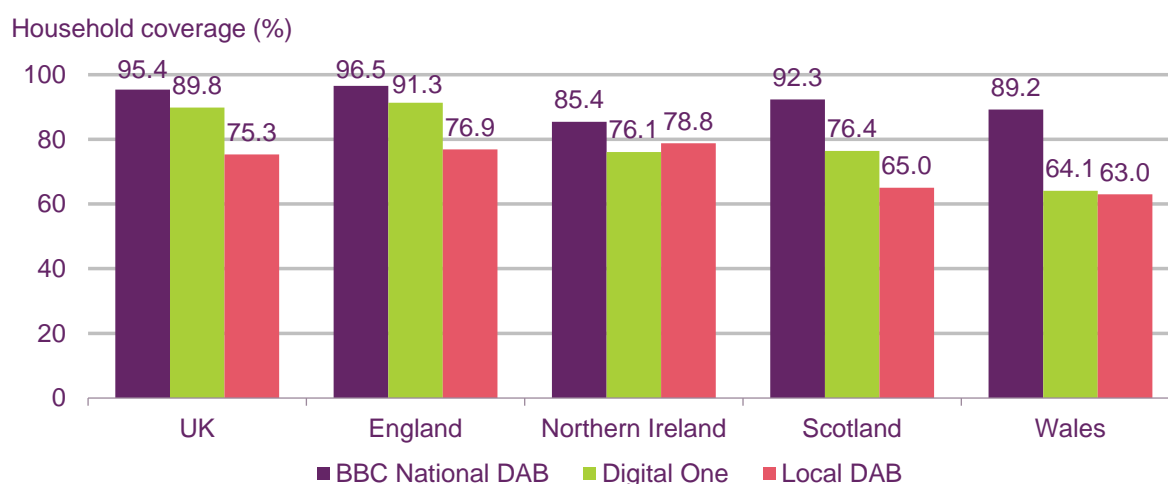
Note: This chart shows the maximum number of stations available; local variations and reception issues mean that listeners may not be able to access all of them.

### 3.3 DAB coverage

#### Local DAB services are available to 78.8% of households

The local DAB multiplex for Northern Ireland covers 78.8% of households (Figure 3.2) and 80.7% of major roads. The BBC’s network services broadcast on DAB are available to 85.4% of households and the UK-wide multiplex Digital One reaches 76.1% of households, an increase of 2.3pp year on year.

**Figure 3.2 Household coverage of DAB**



Source: BBC, Arqiva, Ofcom, June 2015  
 Note: BBC figures indicate coverage at the end of 2014

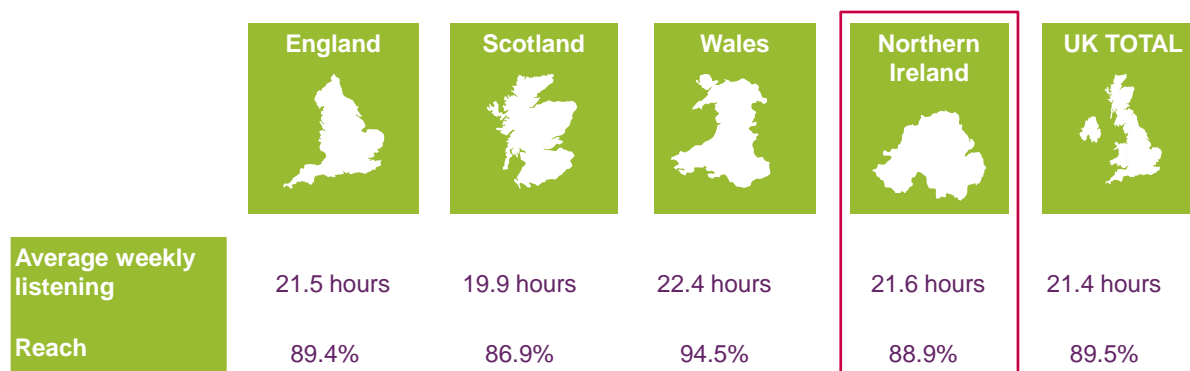
### 3.4 Patterns of listening to audio content

#### The time spent listening to radio in Northern Ireland is higher than in the UK as a whole

Radio listeners in Northern Ireland listened to radio for an average of 21.6 hours each week in 2014. Although this is lower than in Wales (22.4 hours), it is higher than in England and Scotland (21.5 and 19.9 hours respectively) and the UK average (21.4 hours).

Although the amount of time spent listening in Northern Ireland is among the highest, the proportion of the adult population who listen in an average week is lower. During an average week in 2014, radio services reached 88.9% of adults in Northern Ireland (Figure 3.3). This is 2.0pp higher than reach in Scotland, but lower than the reach in England and Wales (89.4% and 94.5% respectively) and the UK average (89.5%).

**Figure 3.3 Average weekly reach and listening hours: 2014**



Source: RAJAR, All adults (15+), year ended Q4 2014. Reach is defined as a percentage of the area's adult population who listen to a station for at least five minutes in the course of an average week.

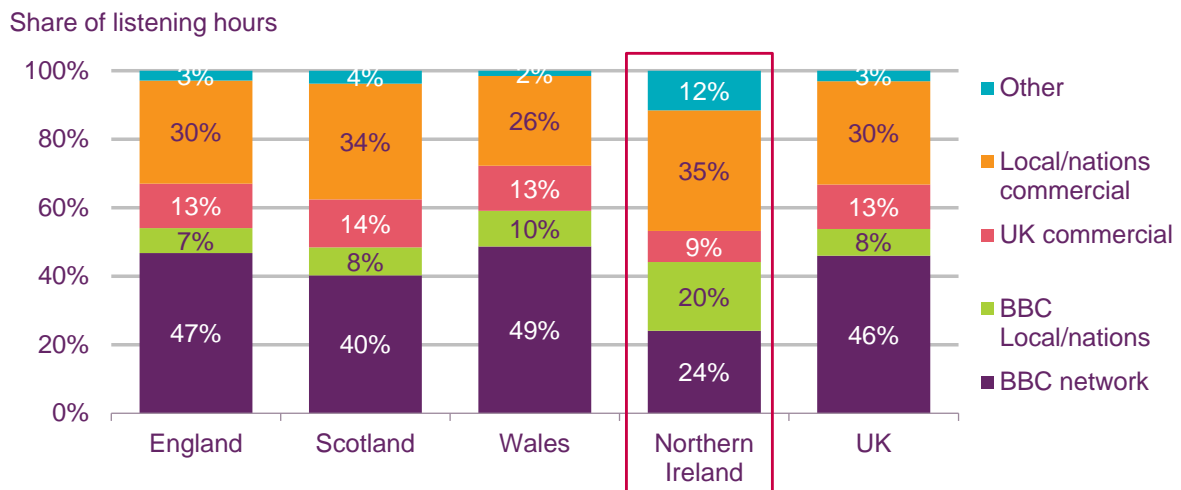
## Local commercial radio is the most listened-to type of radio in Northern Ireland

The share of listening hours to local and nations' services in Northern Ireland is far higher than in any other part of the UK. Local commercial and BBC local and nations' services together accounted for 55% of total listening hours in 2014. The majority of this listening was to local commercial stations, with a 35% share of total listening hours. This is 5pp higher than the UK average, and higher than in any other nation.

The high share accounted for by local commercial stations means that total listening hours for the commercial sector as a whole is also high in Northern Ireland. In 2014, 44% of listening was to commercial stations, second only to Scotland, where 48% of listening was to commercial stations.

Share of listening to BBC local/nations' services accounted for a fifth of all listening in Northern Ireland (Figure 3.4). This was higher than any of the other nations and was 12pp above the UK average (8%). Northern Ireland had by far the lowest share of listening to BBC network services, with a share of 24% compared to the 46% UK average.

**Figure 3.4 Share of listening hours by nation: 2014**



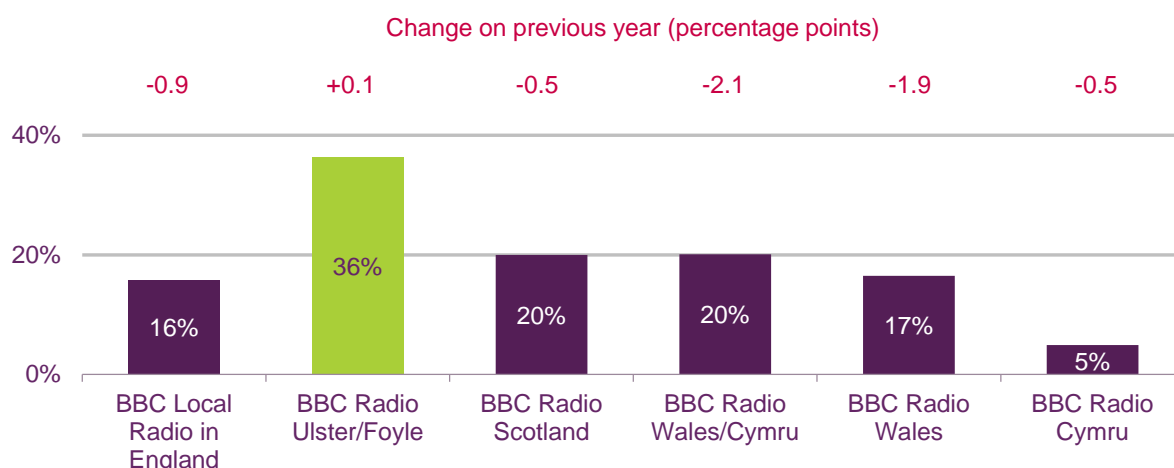
Source: RAJAR, All adults (15+), year ended Q4 2014.

## Northern Ireland has the highest reach for a BBC national service

In an average week in 2014, weekly reach of BBC Radio Ulster stood at 36% (Figure 3.5). This is by far the highest weekly reach of any other BBC nations' service and higher than the aggregated reach of the BBC local radio stations in England. The high reach to this service is reflected in the BBC local/nations' services also having the largest share of listening hours in Northern Ireland when compared to any other nation. (Figure 3.4)

BBC Radio Ulster was also the only national BBC nations' service which did not see a fall in reach; all other respective BBC nations/local services saw a decrease in their average weekly reach.

**Figure 3.5 Weekly reach for nations'/local BBC services: 2014**



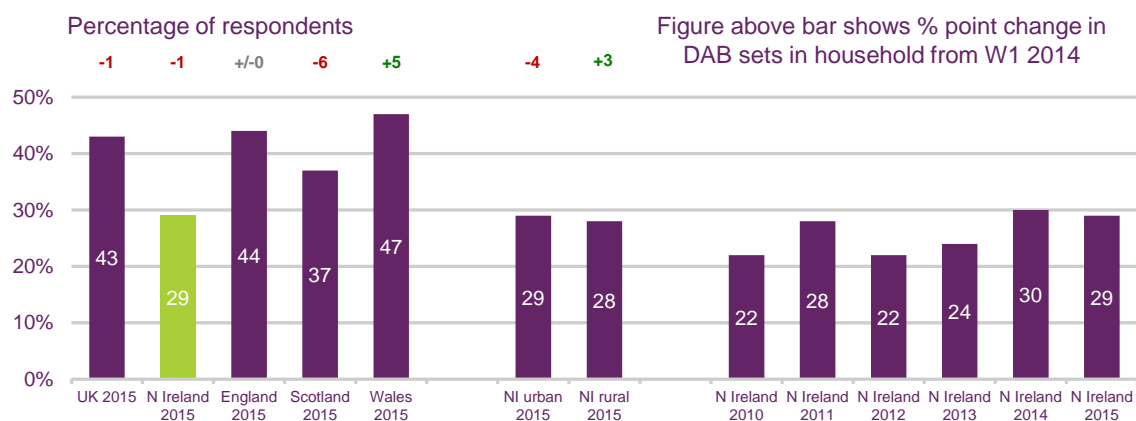
Source: RAJAR, All adults (15+), year ended Q4 2014

### 3.5 Digital radio set ownership and listening

**Ownership of DAB digital radio sets is lower in Northern Ireland than in the UK as a whole**

Twenty nine per cent of adults in Northern Ireland who listen to radio say they have at least one DAB radio set at home, broadly in line with 2014. Ownership of DAB digital radios in Northern Ireland remains lower than the UK average (43%). Ownership of DAB digital radios does not differ between radio listeners in urban and rural areas.

**Figure 3.6 Ownership of DAB digital radios**



Source: Ofcom Technology Tracker, wave 1 2015

QP9. How many DAB sets do you have in your household?

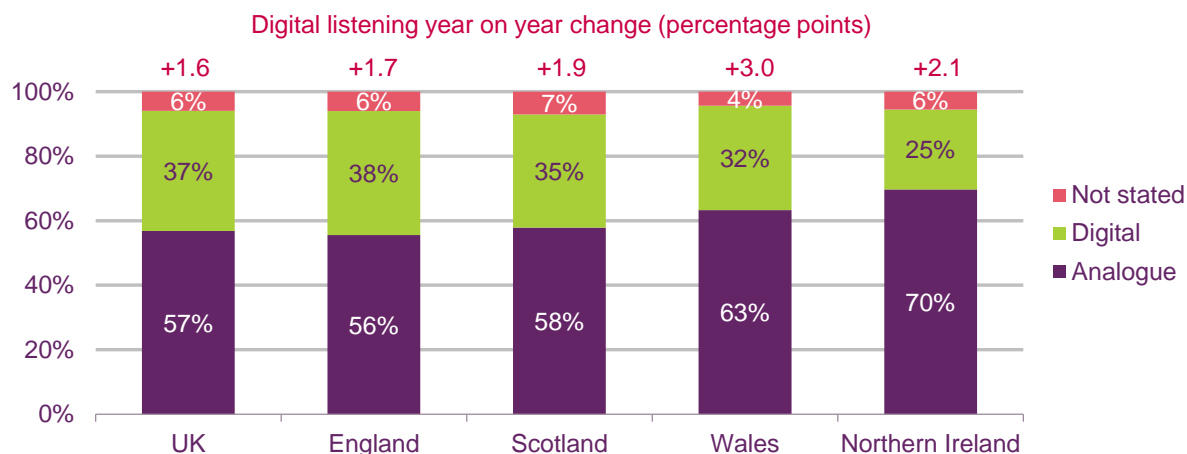
Base: Adults aged 16+ who listen to radio (n = 2934 UK, 406 Wales, 1735 England, 386 Scotland, 407 Northern Ireland, 205 Wales urban, 201 Wales rural, 854 Wales 2010, 397 Wales 2011, 405 Wales 2012, 383 Wales 2013, 403 Wales 2014, 406 Wales 2015)

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

## Analogue listening still accounts for seven in ten listening hours in Northern Ireland

A quarter of all listening hours in Northern Ireland were via digital platforms in 2014, a year-on-year increase of 2.1pp (Figure 3.8). But this is still a lower share accounted for by digital listening than in any other nation, and is 12pp below the UK average (37%). Analogue remains the most popular platform for radio listening in Northern Ireland, with a 70% share of listening hours. The UK average is 57%.

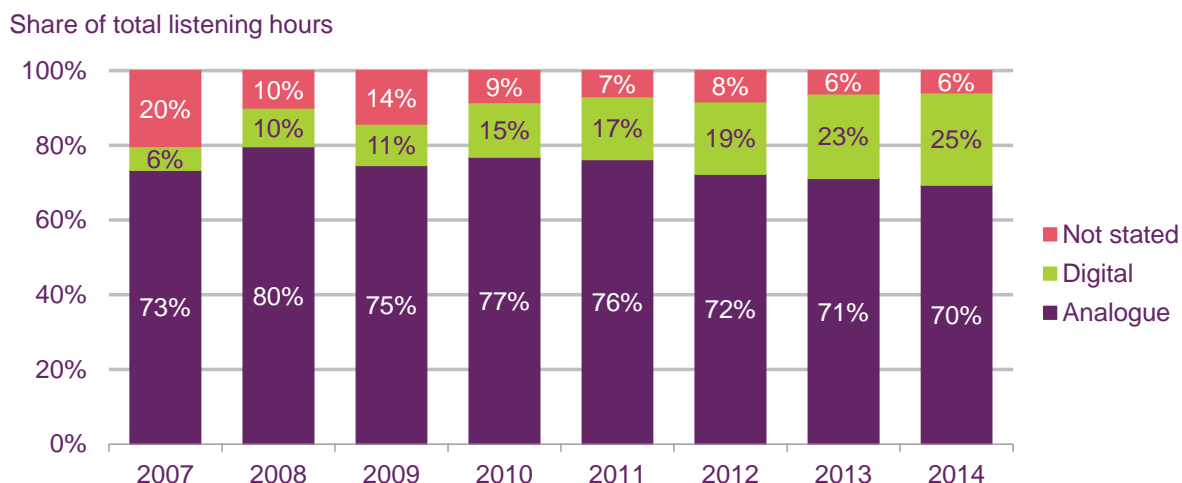
**Figure 3.7 Share of listening hours via digital and analogue platforms: 2014**



Source: RAJAR, All adults (15+), year ended Q4 2014

The share of listening hours accounted for by digital platforms has grown steadily over the years and is now 19pp higher than in 2007 (Figure 3.8). The fall in 'not stated' over six years reflects a change in RAJAR methodology, but the underlying trend of an increase in digital share, and gradual decline in analogue share, is still evident.

**Figure 3.8 Share of listening hours via digital and analogue platforms in Northern Ireland: 2007-2014**



Source: RAJAR, all adults, calendar years 2007-2014

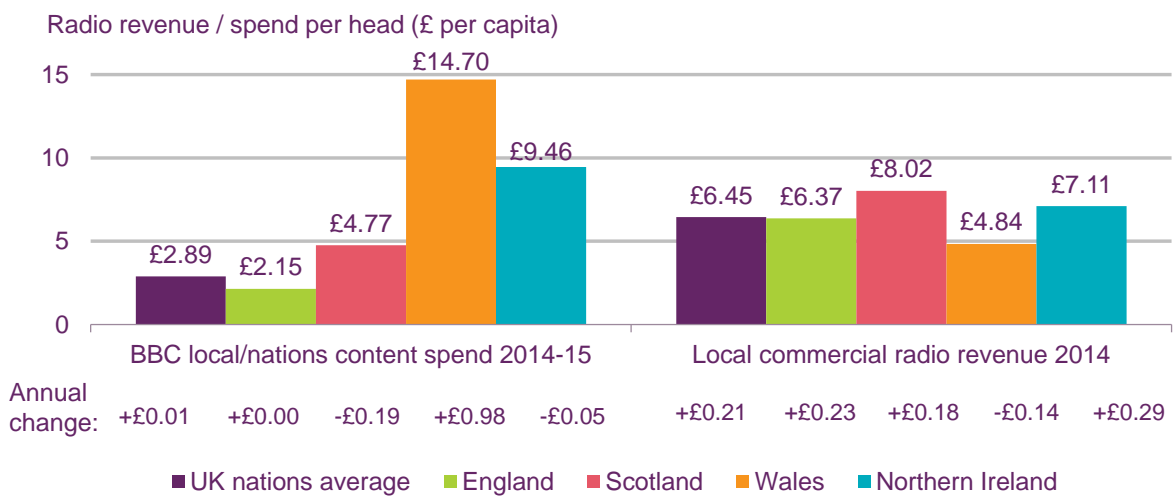
### 3.6 The radio industry

#### Revenue from local commercial radio grew faster in Northern Ireland than in any other nation

Local commercial radio revenue per head of population in Northern Ireland was £7.11 in 2014; an increase of 29p since 2013. This growth was driven by a 10% increase in local advertising revenue from these stations in Northern Ireland, which more than offset slight declines in revenues from sponsorship.

While revenues from local commercial stations increased, spend by the BBC on content for Radios Ulster and Foyle fell slightly. On a per-capita basis, 5p less per head was spent by the BBC on content for these stations.

**Figure 3.9 Local/nations' radio spend and revenue per head of population: 2014**



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.

