3 Radio and audio content

3.1 Recent developments in Scotland

Commercial radio

In October, Ofcom announced that Rock Radio (RockScot Ltd) had been awarded the advertised FM commercial radio licence in the west central Scotland area (Glasgow). Ofcom had received four applications for the licence; from Caledonia Holdings Ltd (GO 96.3 Glasgow), Original 96 Glasgow Ltd (Original FM), Radio Clyde Ltd (Clyde Rocks) and RockScot Ltd (Rock Radio Glasgow).

Small-scale digital radio

In February 2016 Ofcom extended the trial of the ten UK-wide small-scale digital multiplexes, including the Glasgow multiplex, for a further two years. The Glasgow multiplex, licensed to Scrimshaws Information Directories, currently carries eight smaller radio stations, such as community stations, enabling them to broadcast on DAB digital radio. In September 2016 Ofcom published its final report on the small-scale DAB trial, concluding that, overall, the trials had been highly successful. The trial demonstrated that the small-scale approach to DAB transmission is technically sound, and it helped triallists, the industry and Ofcom to understand the practical requirements for successfully sustaining DAB radio transmissions using the small-scale approach.

Community radio

In May 2017 Ofcom awarded a licence to Ark AM in Glasgow. The new radio station aims to serve the needs of Glasgow's diverse Muslim community through education, information and entertainment in a way that reflects the ethnic and linguistic profile of the community and identifies with Glaswegian culture. It will be the 27th community radio station in Scotland and the only one currently broadcasting on AM.

3.2 Radio station availability

There are now 87 stations broadcasting on DAB in Scotland, although not all are currently accessible in parts of Scotland

There are now 87 stations available on DAB in Scotland.

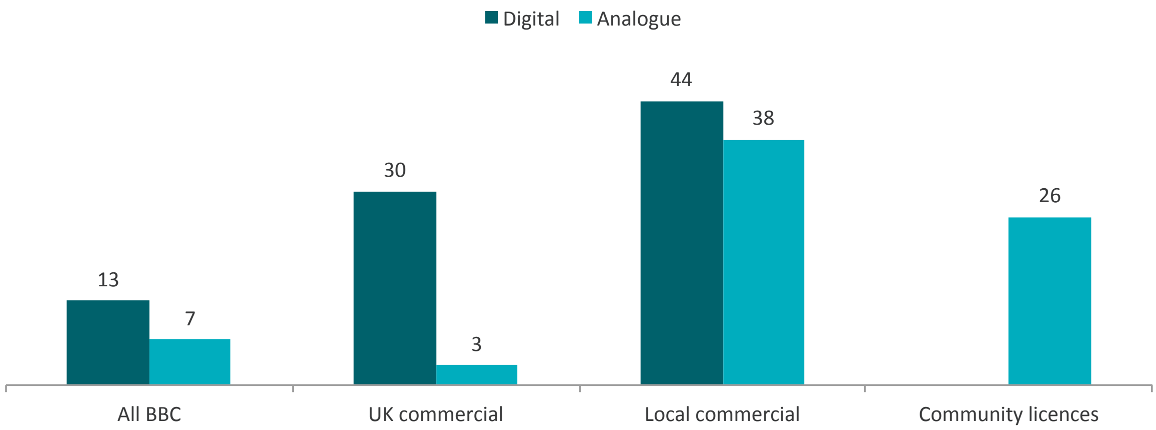
This comprises 13 from the BBC, 30 stations on the Sound Digital and Digital One multiplexes, and 44 commercial stations on local DAB multiplexes.

However, not all these digital stations will be available on DAB to listeners across Scotland.

As Figure 3.1 shows, the proportion of households within the coverage area for each type of station varies, and there are different services on each of the local DAB multiplexes serving different parts of Scotland.

There are also 74 analogue stations available in Scotland overall.

Figure 3.1: Radio station availability in Scotland



Source: Ofcom, May 2017
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

DAB services from the BBC are available to 95% of households in Scotland

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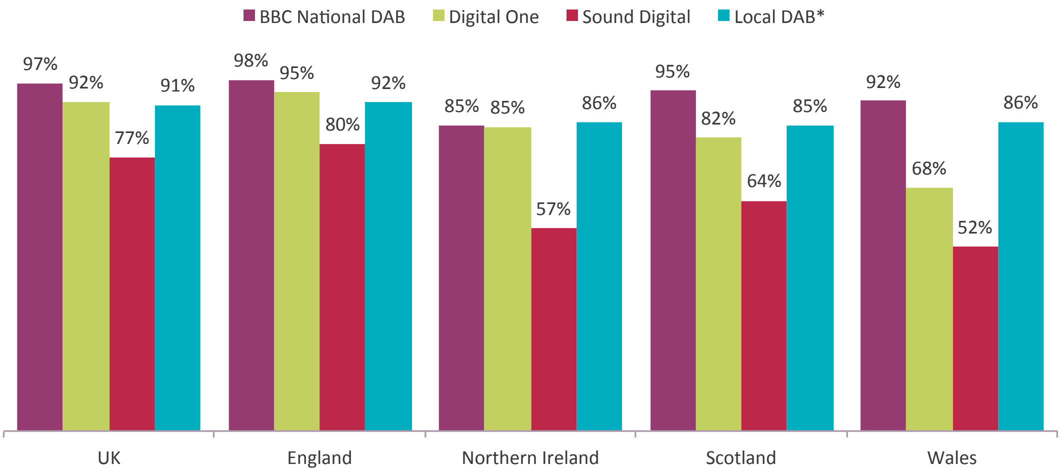
the same as last year. Coverage from Digital One, one of the UK-wide commercial multiplexes, reaches 82% of households in Scotland. Coverage of local DAB in Scotland is now 85% of households.

Figure 3.2: Household coverage of DAB



Source: BBC, Arqiva, Ofcom, May 2017
*Figures for local DAB are projections of expected coverage for autumn 2016 based on a planned list of transmitter sites. The plan is continuing to be refined, and actual coverage may differ slightly from those figures when the current programme of expansion completes.

3.4 Listening to audio content

Scotland has the smallest proportion of radio listeners of all the UK nations

Eighty-seven per cent of adults listen to the radio each week in Scotland, lower than the UK average and the lowest proportion of all the individual nations. They listen for an average of 20 hours 36 minutes each week, 48 mins less than listeners across the UK as a whole, and the lowest of all the nations.

Figure 3.3: Average weekly reach and listening hours

	England	Scotland	Wales	Northern Ireland	UK TOTAL
Average weekly listening	21.4 hours	20.6 hours	22.7 hours	20.8 hours	21.4 hours
Reach	89.7%	87.1%	91.6%	89.0%	89.6%

Source: RAJAR, All adults (15+), 12 months ended Q1 2017. Reach is defined here as the number of people aged 15+ who tune to a radio station within at least 1 quarter-hour period over the course of a week.

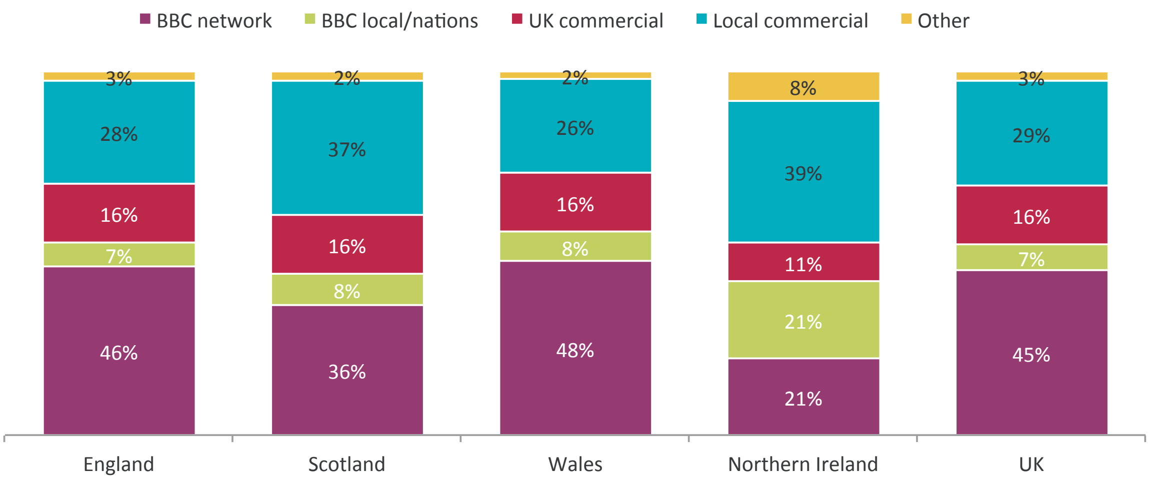
More than half of radio listening time in Scotland is to commercial stations

The amount of time spent listening to any radio in Scotland has decreased by more than a million hours in the past year (81.3 million hours vs. 82.7 million hours). Commercial stations accounted for 53% of listening hours in Scotland in 2017.

This is 8 percentage points (pp) higher than the UK average and the highest across any of the UK nations. The majority of commercial listening in Scotland is to local commercial stations, and this type of station accounts for 37% of total listening hours.

The share of listening to BBC stations overall in Scotland is lower than the UK average and higher only than in Northern Ireland.

Figure 3.4: Share of listening hours, by nation

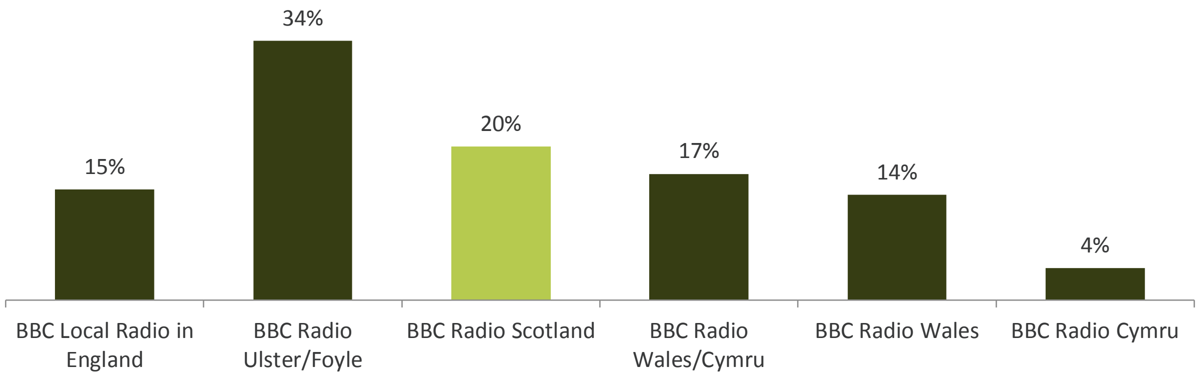


Source: RAJAR, All adults (15+), 12 months to Q1 2017

One-fifth of adults in Scotland listen to BBC Radio Scotland each week

The weekly reach of BBC Radio Scotland was 20%, 5pp higher than the aggregate reach for BBC local services in England, and 6pp higher than BBC Radio Wales. Although reach has dropped slightly since 2016 average listening hours are at their highest level since 2008 (7 hours 8 minutes).

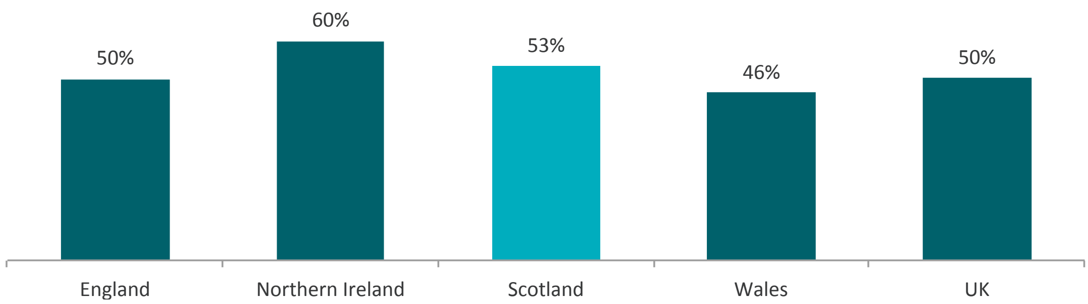
Figure 3.5: Weekly reach for nations'/local BBC services



Source: RAJAR, All adults (15+), 12 months to Q1 2017
Note: BBC Radio nan Gàidheal is not measured separately by RAJAR and so is not shown.

In comparison, the average weekly reach of local commercial radio in Scotland, in the 12 months to Q1 2017, was 53%.

Figure 3.6: Weekly reach to local commercial radio



Source: RAJAR, All adults (15+), 12 months to Q1 2017

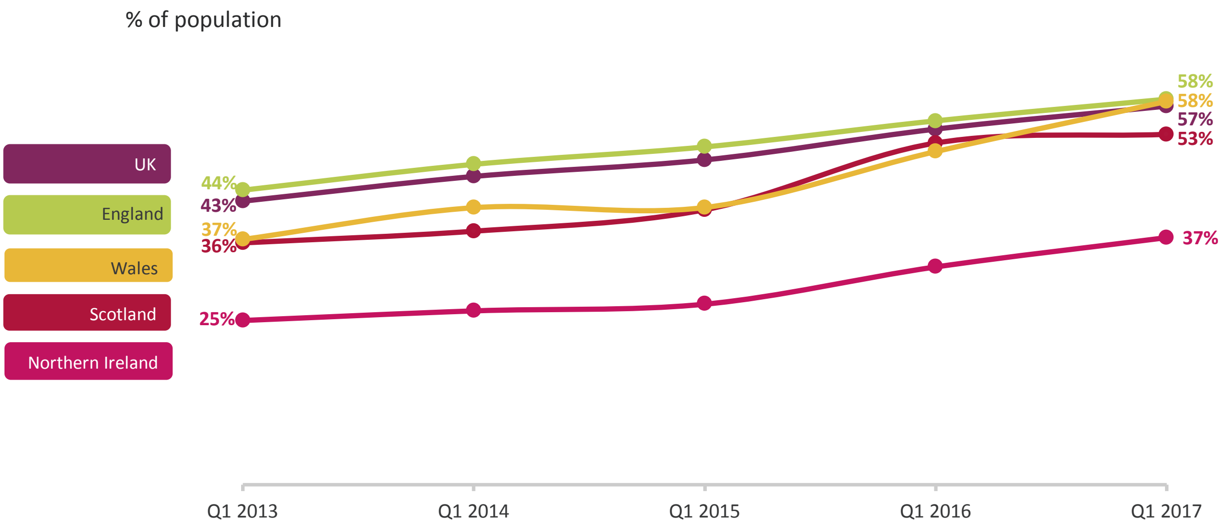
3.5 DAB digital radio set ownership and listening

More than half of all adults in Scotland now own a DAB radio set

Fifty-three per cent of adults in Scotland own a DAB digital radio set.

This has increased by 2pp since 2016 but by 16pp since 2013, a greater rate of growth than across the UK overall (14pp).

Figure 3.7: Ownership of DAB digital radios



Source: RAJAR, All adults (15+), 12 months to Q1. Note: In previous CMR reports we have used figures from Ofcom's Tech Tracker

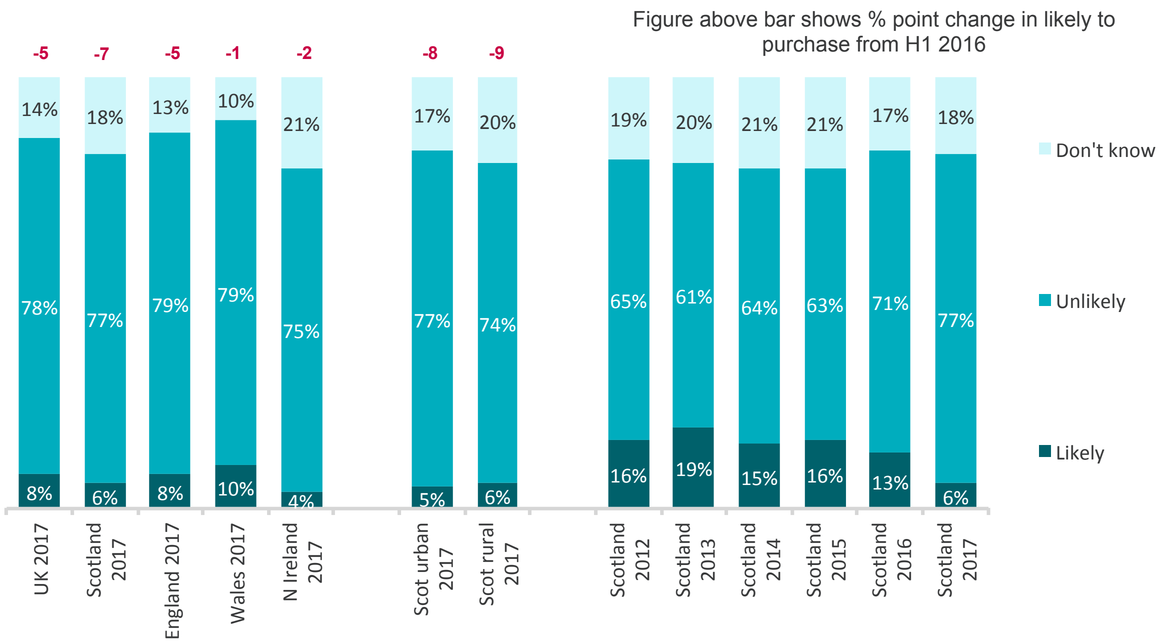
Less than one in ten radio listeners in Scotland without a DAB set say they are likely to buy one within the next year

Six per cent of radio listeners in Scotland who do not have a DAB set say they are likely to get one in the next 12 months.

This figure does not differ from that for the UK overall (8%), and does not vary significantly by location in Scotland.

There has been no change in the likelihood of buying a DAB set since 2016.

Figure 3.8: **Likelihood of purchasing a DAB radio within the next year**



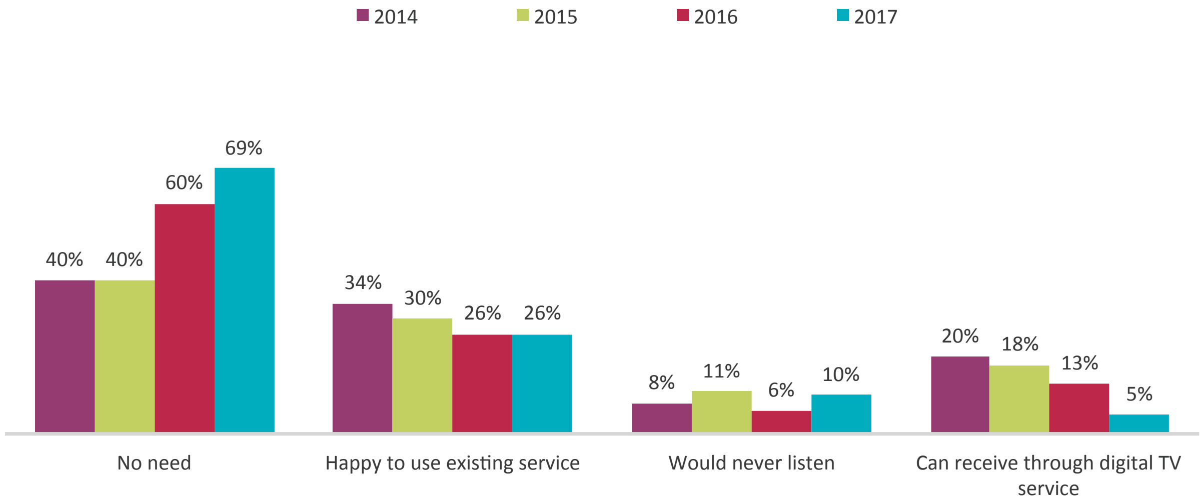
Source: Ofcom Technology Tracker, Half 1 2017
Base: Adults aged 16+ who listen to radio and do not have a DAB set (n = 1533 UK, 250 Scotland, 800 England, 214 Wales, 269 Northern Ireland, 134 Scotland urban, 116 Scotland rural, 243 Scotland 2012, 257 Scotland 2013, 211 Scotland 2014, 239 Scotland 2015, 236 Scotland 2016, 250 Scotland 2017).
Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland and UK in 2017, between Scotland urban and rural in 2017 and at the 99% confidence level between Scotland 2016 and 2017. Circles around the +/- figures above the chart indicate any significant difference at the 99% confidence level between 2016 and 2017 for Scotland, urban and rural.
QP12: How likely is it that your household will get a DAB radio in the next 12 months?

Most radio listeners in Scotland without a DAB set say they are not likely to buy one within the next year because they have no need to

Radio listeners stating they were unlikely to get DAB radio in the next 12 months were asked to say – without prompting – why they were unlikely to do so. Almost six in ten (58%) said it was because they did not need it, while a third (32%) said it was because they were happy using an existing service. Around one in ten said they would never listen to it (13%), or said they could receive a digital radio service through their TV (8%).

There has been no change since 2016 in the reasons given for being unlikely to buy a DAB set.

Figure 3.9: **Reasons why unlikely to purchase DAB in the next year**



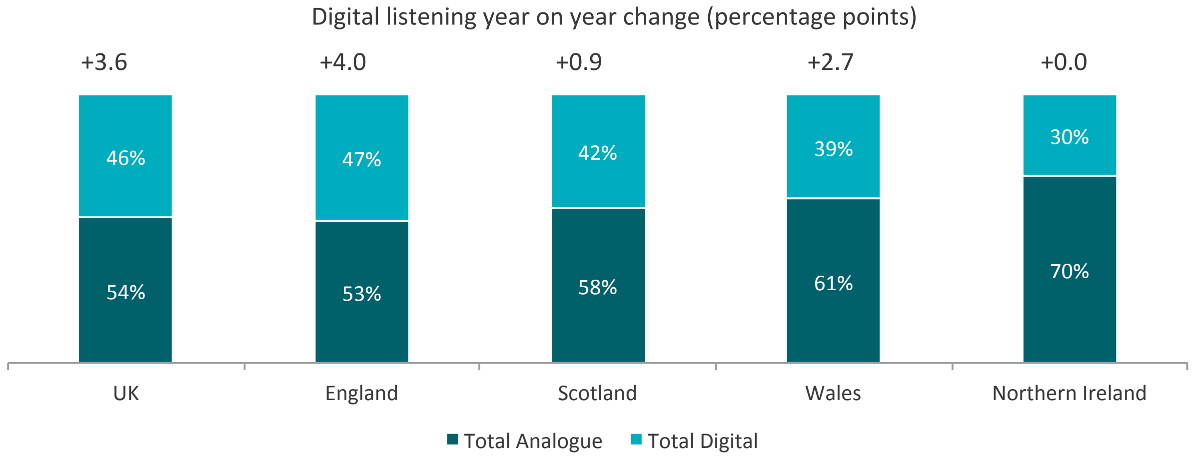
Source: Ofcom Technology Tracker, Half 1 2017
Base: All adults aged 16+ who listen to radio and are unlikely to get DAB radio in the next 12 months (Scotland 2014 = 137; Scotland 2015 = 148; Scotland 2016 = 174, Scotland 2017 = 193)
Responses shown for spontaneous mentions by 5% or more at a UK level
Significance testing: Arrows indicate any significant differences at the 99% confidence level between Scotland 2016 and 2017.
QP14: Why are you unlikely to get digital radio in the next 12 months?

More than two-fifths of radio listening in Scotland is now done through a digital platform[1]

Digital's share of listening increased by less than 1pp year on year in Scotland, and accounted for 42% of all listening hours.

Listening specifically through a DAB radio set increased by 2pp in the same period.

Figure 3.10: Share of listening hours via digital and analogue platforms



Source: RAJAR, All adults (15+), 12 months to Q1 2017

[1] DAB radio set, digital television and the internet.

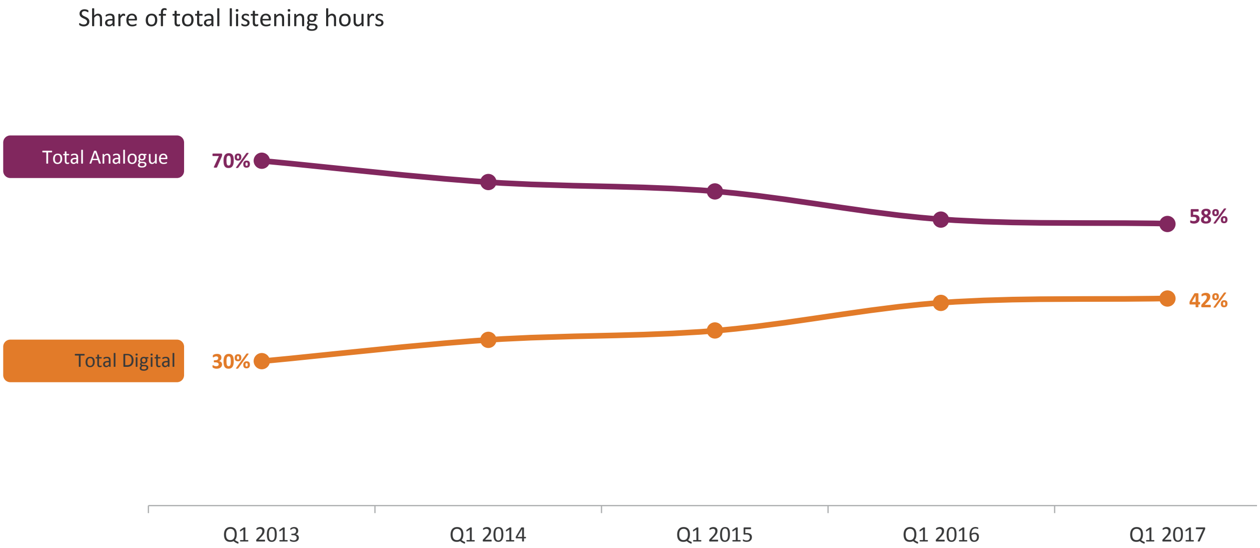
Growth in digital share of listening has slowed in the past year

Although the proportion of time spent listening to the radio using digital platforms has increased by 12pp since 2013, the shift in listening from analogue to digital platforms has stabilised in the past year.

In the 12 months to Q1 2017, the average weekly reach of DAB in Scotland was 40%, an increase of 23pp since 2010. In comparison, the average weekly reach of radio stations via digital TV was 14%, not dissimilar to 12% in 2010.

Although the average weekly reach of radio stations via the internet has remained largely stable since 2015, there has been an 11pp increase since 2010.

Figure 3.11: Share of listening hours via digital and analogue platforms in Scotland: Q1 2013 - Q1 2017



Source: RAJAR, all adults, 12 months to Q1 for each year

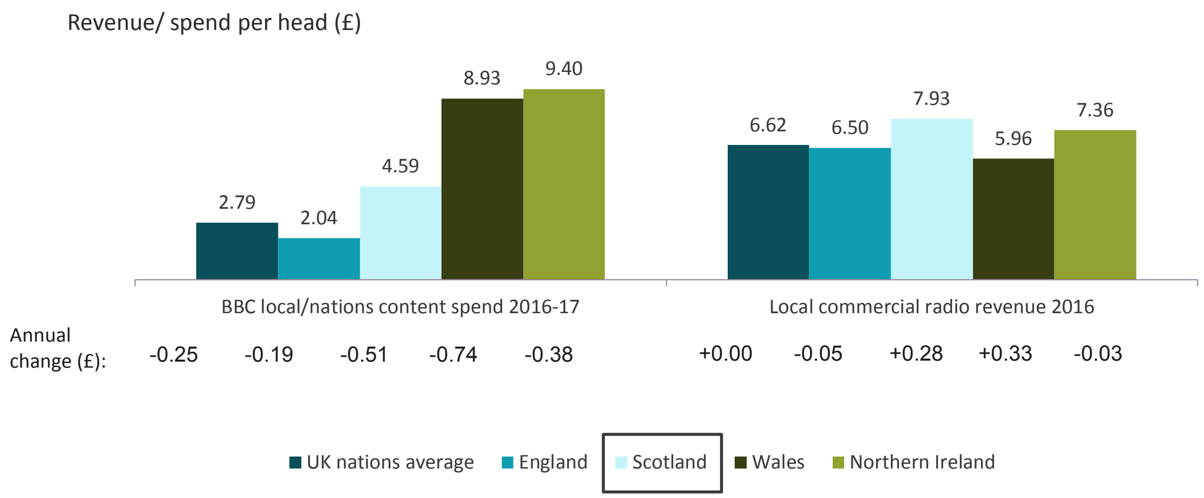
3.6 The radio industry

Local commercial radio revenue per head is highest in Scotland

Per capita local commercial radio revenues continue to be highest in Scotland, and were £7.93 in 2016, up 28p in real terms on the previous year.

BBC spend on content for BBC Radio Scotland and BBC Radio nan Gàidheal fell by 10% in real terms to £4.59, which continues to be higher than the UK average, but lower than in Wales or Northern Ireland.

Figure 3.12: Local/nations' radio spend and revenue per head of population: 2016



Source: Broadcasters
Note: The UK total shows the average for local commercial radio across the four nations and therefore excludes services broadcast UK-wide. Figures are nominal.