

## 3 Radio and audio content

### 3.1 Recent developments in Scotland

#### Commercial radio

In November 2011 Ofcom approved Global Radio Holdings Ltd's request to change Capital FM Scotland's format requirements to "a rhythmic-based music-led service for 15-29 year-olds supplemented with news, information and entertainment". This was on the basis that the change would not result in a narrowing of listener choice, and that Capital FM Scotland would continue to offer a distinctive service in the central Scotland market.

A request from Original FM Aberdeen Ltd to change the format of Original 106 (Aberdeen) was also approved by Ofcom in December 2011, subject to one amendment. The new format is designed to appeal in particular to 35-39 year old male listeners and includes 24-hour news.

GMG Radio rebranded 96.3 Rock Radio as 96.3 Real XS. GMG described the impact of rebranding as providing a "much stronger commercial proposition" to advertisers in Scotland and greater brand strength and awareness for its rock music station. Real Radio's collaboration with STV to produce the *Scotland's Greatest Album* programme was the first collaboration of its kind for the radio station, involving a joint, simulcast production linked with social and traditional media.

#### Community radio

In October 2011 Ofcom extended Leith FM's licence by five years to March 2017. In March 2012 the station relaunched as 98.8 Castle FM, and in April completed a £10,000 project to build new studios at its Leith premises.

Ofcom has conducted a round of licensing for community radio in Scotland, attracting 19 applications. Services were proposed for many different parts of the country including the Outer Hebrides, Edinburgh, Glasgow, East Lothian and Fort William.

Community and small ILR stations across Scotland formally constitute the Scottish Community Broadcasting Network (SCBN). Stations choosing to join pay an annual membership fee, and share good practice and programme-making experience. Network stations attended a reception at the Scottish Parliament in March 2012. Future plans include developing a Scottish radio news service for SCBN stations.

In 2011 the Scottish Government commissioned research into the community radio sector in Scotland, which it published in March 2012<sup>16</sup>. The research provides an overview of community radio generally, focusing on the Scottish sector. Most station managers surveyed said they would consider sharing premises, equipment and resources with other stations or with arts, community, education or voluntary organisations. The research showed that community radio stations in Scotland do collaborate with each other and, to some extent, with professional broadcasters, but concluded that such links should be consolidated and improved.

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<sup>16</sup> <http://www.scotland.gov.uk/Publications/2012/03/9142/1>

### 3.2 Radio service availability

Across Scotland, digital radio listeners in the Glasgow and Ayr areas have the greatest DAB choice, with 35 stations. This includes the 13 networked and national BBC services, the 14 services available on the national Digital One multiplex and eight local commercial stations. Station choice is lowest in Inverness, with three local commercial stations available on DAB. (Figure 3.1)

**Figure 3.1 Availability of DAB stations in Scotland, by area**



Source: Ofcom, April 2012

Note: This chart shows the maximum number of stations available in each area; local variations along with reception issues mean that listeners may not be able to access all of these

In addition to these digital services, there are 38 commercial analogue stations and 18 community radio stations currently broadcasting in Scotland. (Figure 3.2)

**Figure 3.2 Number of community radio stations on air: 2006- 2012**



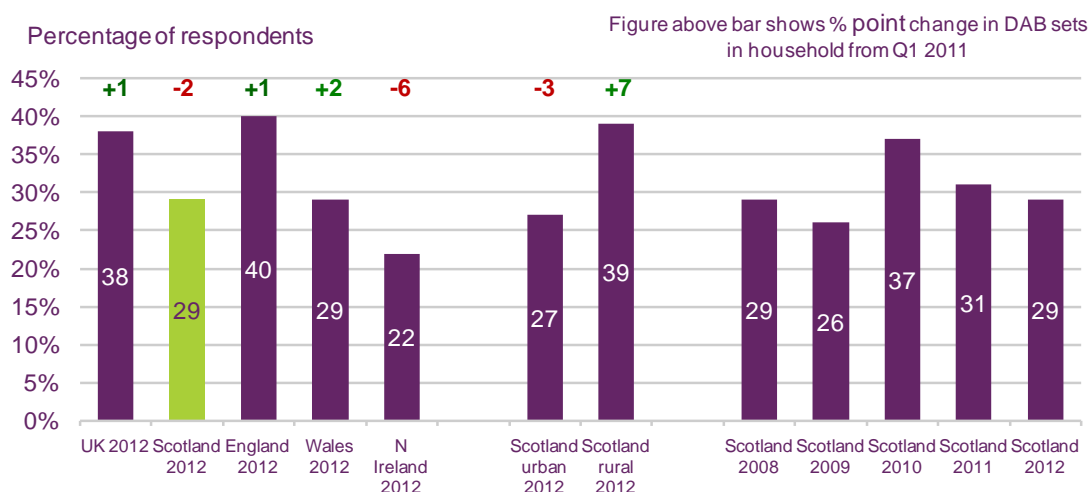
Source: Ofcom, April 2012

### 3.3 Digital radio set ownership

#### Three in ten adults in Scotland have a digital radio set

Digital radio set ownership in Scotland remains unchanged this year, with three in ten adults (29%) who listen to the radio reporting that they have a DAB radio set at home. The two percentage point fall compared to 2011 is not statistically significant. (Figure 3.3)

**Figure 3.3 Ownership of DAB digital radios**



Source: Ofcom research, Q1 2012 Base: All adults aged 16+ who listen to radio (n = 2963 UK, 364 Scotland, 1790 England, 405 Wales, 404 Northern Ireland, 200 Scotland urban, 164 Scotland rural, 766 Scotland 2008, 780 Scotland 2009, 1034 Scotland 2010, 357 Scotland 2011, 364 Scotland 2012) Question. 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? Note: Remaining percentages are Don't know responses. 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.

### 3.4 Patterns of listening to audio content

#### Average weekly listening hours in Scotland are lower than in other nations

Among adults in Scotland, average weekly radio listening stood at 21.4 hours, the lowest across all of the UK nations. Radio services reached 87.3% of the adult population, again the lowest across all of the UK nations and 3.8 percentage points lower than the UK average of 91.1%. (Figure 3.4)

**Figure 3.4 Average weekly reach and listening hours: year to Q4 2011**

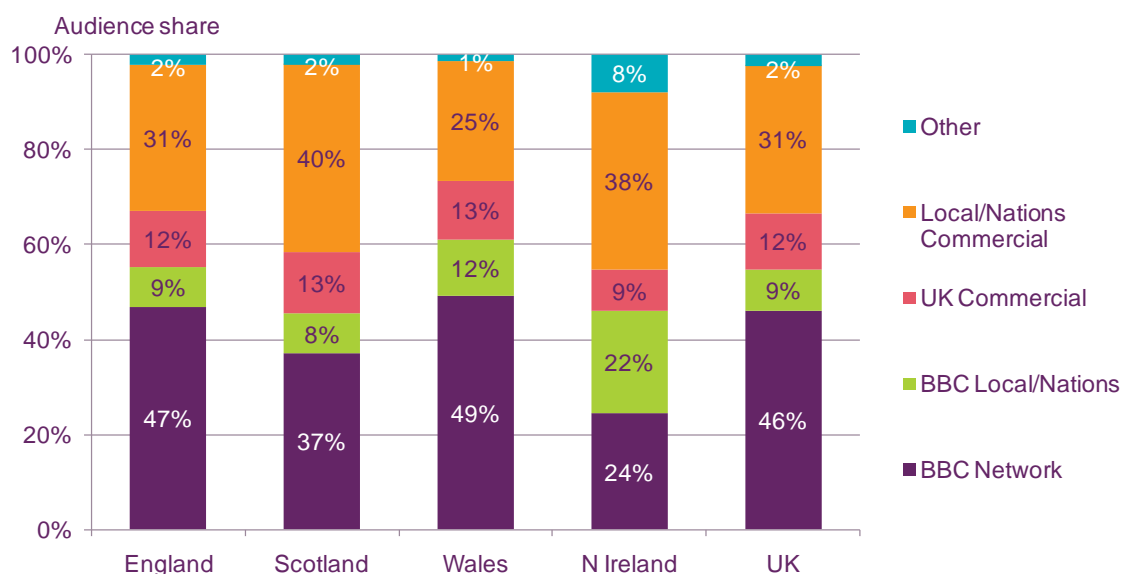
	England	Scotland	Wales	Northern Ireland	UK TOTAL
Average weekly listening	22.5 hours	21.4 hours	23.2 hours	22.0 hours	22.5 hours
Reach	91.1%	87.3%	93.2%	90.1%	91%

Source: RAJAR, All adults (15+), year ended Q4 2011. Reach is defined as a percentage of the respective adult population who listen to a station for at least five consecutive minutes in the course of an average week

### Local commercial radio stations are more popular in Scotland than in other nations

In 2011, local commercial stations accounted for 40% of total radio listening hours in Scotland, a higher share for this sector than in any other UK nation (the UK average was 31%). National commercial stations attracted a 13% market share, slightly higher than the UK average of 12%. As would be expected with a high market share of commercial stations, BBC stations accounted for 45% of market share in Scotland, lower than in any of the other nations and lower than the UK average of 55%. (Figure 3.5)

**Figure 3.5 Share of listening hours, by nation: year to Q4 2011**

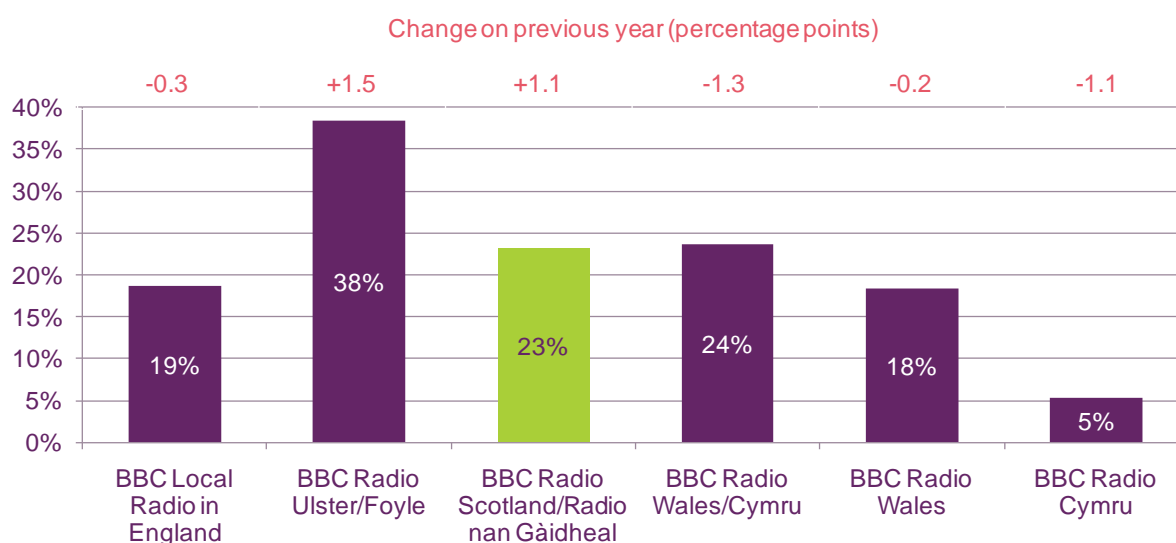


Source: RAJAR, All adults (15+), year ended Q4 2011

Note: BBC Local/Nations includes both BBC Scotland and Radio Nan Gàidheal

Just over one-fifth (23%) of adults listened to BBC Radio Scotland in an average week in 2011, up by 1.1 percentage points on the previous year (Figure 3.6). Total listening hours to the national BBC stations in Scotland accounted for 8% of all radio listening hours in 2011. This is similar to the share of BBC local radio listening in England and the UK average (both 9%), but lower than in Wales (12%) and Northern Ireland (22%) (Figure 3.5).

**Figure 3.6 Weekly reach of national/local BBC services**



Source: RAJAR, All adults (15+), year ended Q4 2011. Reach is defined as the total proportion of the adult population within each respective TSA who listed to at least five consecutive minutes in the average week.

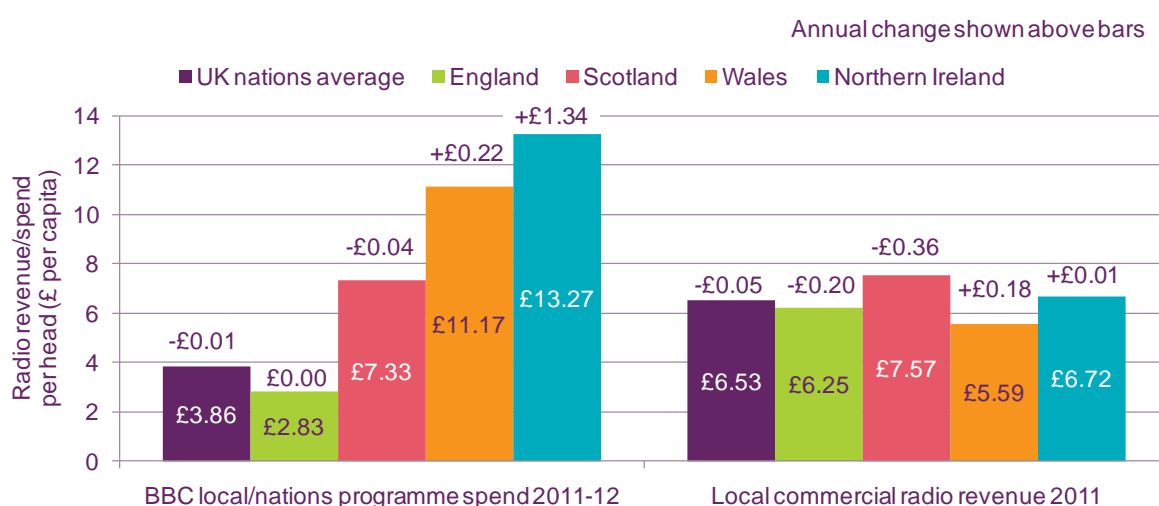
### 3.5 The radio industry

#### Commercial radio revenue and BBC Radio funding in Scotland

The commercial revenues generated by local radio stations in Scotland reached £39.7m in 2011. Adjusting for population size, Scotland has the largest revenue per head of the UK nations at £7.57, a £0.36 (4%) decrease on 2010 (Figure 3.7).

BBC Radio spend on BBC Radio Scotland and BBC Radio nan Gàidheal totalled £38.1m in 2011/12. Expenditure per head declined £0.04 to £7.33. Scotland was the only UK nation to see BBC expenditure per head decline (albeit marginally) in 2011/12.

**Figure 3.7 Local/nations radio spend and revenue per head of population: 2011/12**



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.