

# Digital radio report 2013

25<sup>th</sup> September 2013

# Figure 1

## Existing DAB coverage

Existing DAB coverage	Aggregate of local multiplexes	BBC national	Commercial national (Digital One)
Households	71.7%	94.4%	89.5%
Roads	56.4%	83.6%	75.7%

Source: Ofcom, Arqiva, BBC, September 2013

Note: "National" means UK-wide. Road coverage refers to motorways and A-roads

## Figure 2

### Existing FM coverage

Existing FM coverage	Aggregate of local coverage	BBC national (BBC Radios 1 to 4)	Commercial national (Classic FM)
Households	92.6%	94.9%	90.9%
Households (variable)	97.9%	99.1%	97.4%
Roads	91.5%	93.1%	86.8%
Roads (variable)	95.5%	95.8%	90.3%

Source: Ofcom, September 2013

## Figure 3

Number of UK radio stations broadcasting on analogue, August 2013

Type of station	AM	FM	AM/FM total
Local commercial	54	238	292
UK-wide commercial	2	1	3
BBC UK-wide networks	1	4	5
BBC local and nations	36	46	46
Community radio	6	201	207
<b>TOTAL</b>	<b>99</b>	<b>490</b>	<b>553</b>

Source: Ofcom, May 2012

Note: the conditions of each licence will determine the amount of programming that may be shared between these licensed services. Here we have taken the view that a service providing at least four hours a day of separate programming (even if the same brand has other services) equals one service.

## Figure 4

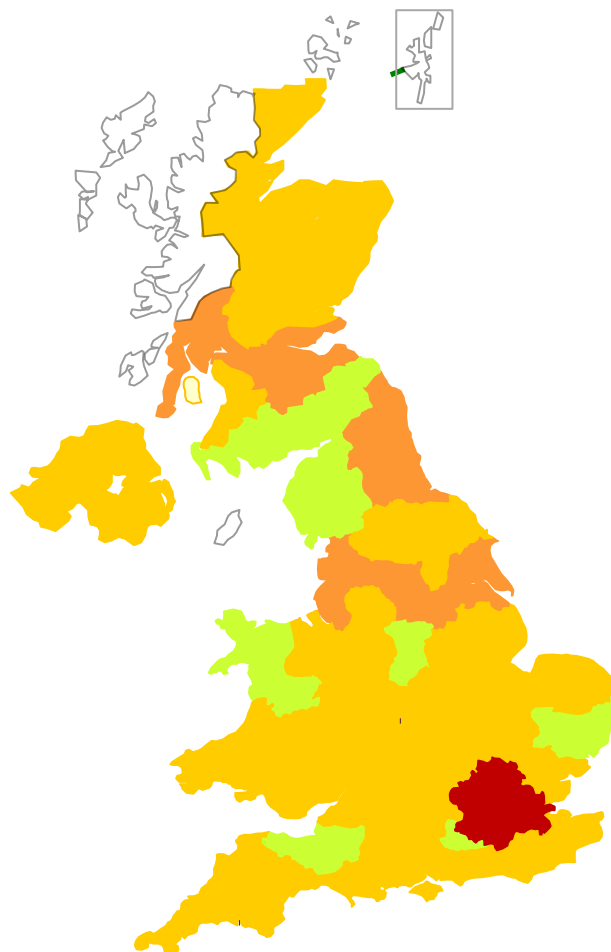
### Number of UK radio stations broadcasting on DAB: August 2013

Type of station	Relation to analogue area	Number of stations
Local commercial	DAB in analogue area	100
	DAB extends analogue area	12
	DAB only	33
UK-wide commercial		14
BBC UK-wide networks		11
BBC local and nations		32
<b>TOTAL</b>		<b>250</b>

Source: Ofcom, August 2013

# Figure 5

Number of services available on UK DAB, UK map

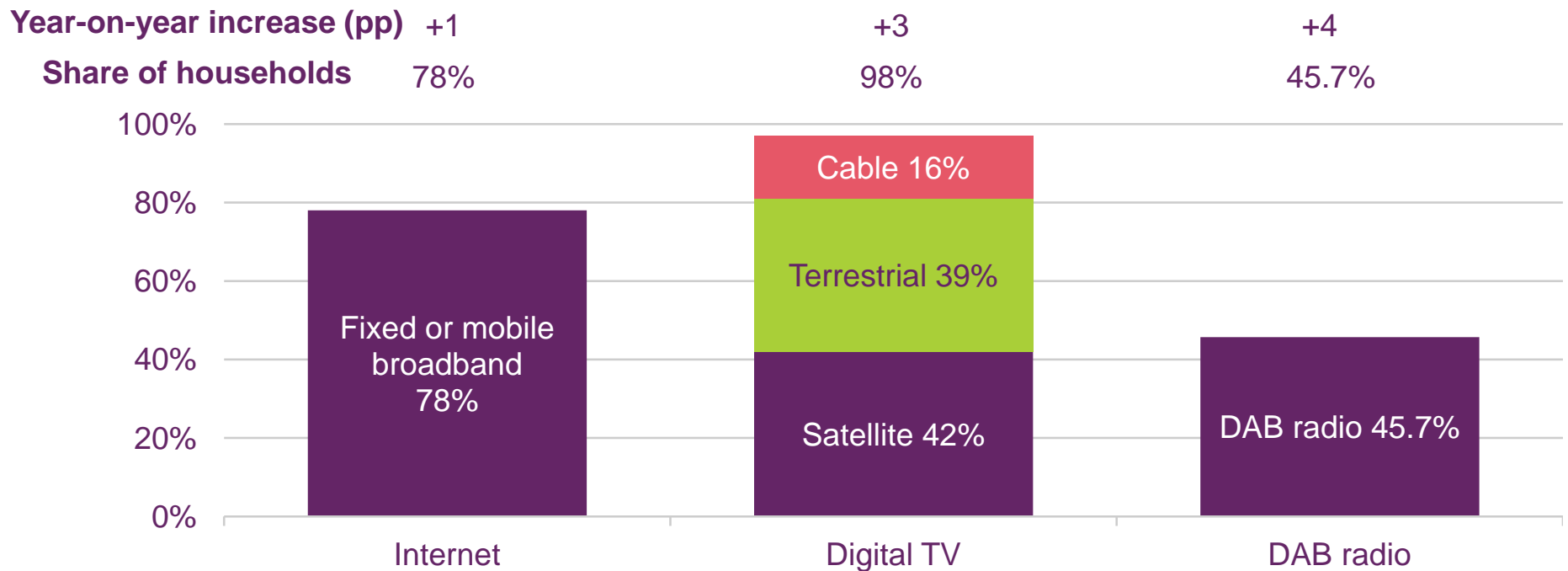


No. services	BBC national	Commercial national	No. local multiplexes
0	-	-	-
11	✓	-	-
25	✓	✓	-
26-35	✓	✓	1
36-44	✓	✓	2 (see note)
45+	✓	✓	3

Source: Ofcom, September 2013. Note: the Tyne and Wear and Teeside areas have one multiplex each, but each of these multiplexes carry more services than most other local multiplexes.

## Figure 6

### Take-up of equipment capable of receiving digital radio: 2013



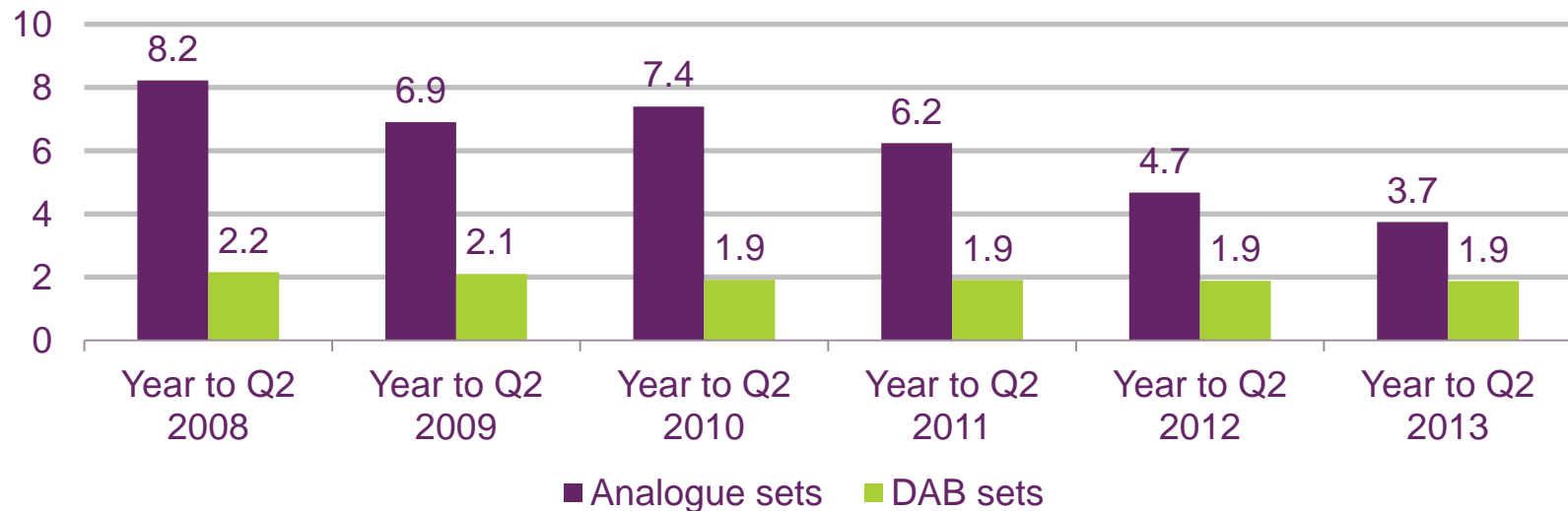
Source: Ofcom Technology tracker, RAJAR Q2 2013

## Figure 7

### Number of analogue and digital radio sets sold: year to Q2 2008-2013

Total annual sales:	10.4 million	9.0 million	9.3 million	8.1 million	6.6 million	5.6 million
Digital share of sales:	20.8%	23.3%	20.5%	23.4%	28.7%	33.4%

Radio set sales (millions)



Source: GfK sales data, 2008-2013.

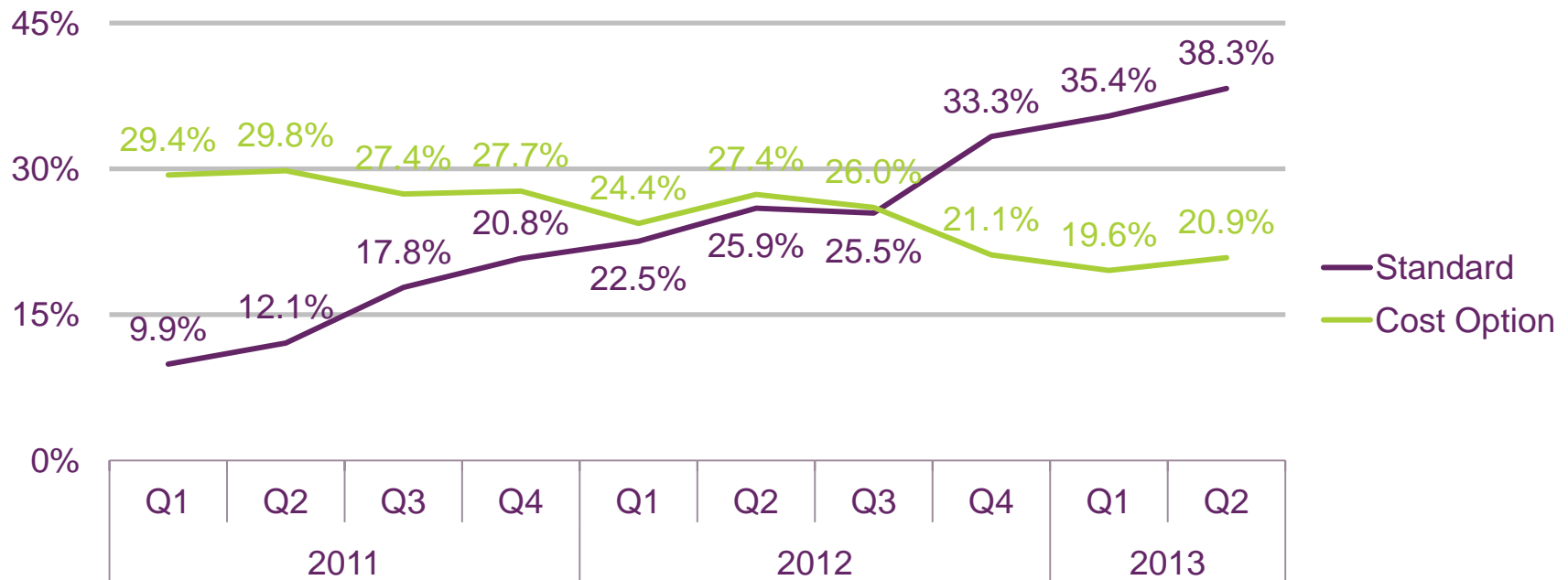
Note: Figures cover GB only, GfK Panelmarket data represents over 90% of the market. Categories of device included are; portable radios, personal media players, car audio systems, home audio systems, clock radios, radio recorders, headphone stereos, tuners and receivers.



## Figure 8

### Status of digital radio availability in newly registered cars

Proportion of newly registered cars (%)



Source: CAP/SMMT

## Figure 9

### The radio set universe and frequency of listening

	Sets in the market (millions) – lower bound estimate <sup>3</sup>	Estimated proportion used at least weekly (%) <sup>4</sup>	Estimated proportion that are digital (%) <sup>5</sup>
In home radios <sup>1</sup>	66m – 81m	73%	19 – 23%
Vehicle radios <sup>2</sup>	35m	92%	5 – 9%
<b>Total</b>	<b>101m – 117m</b>	<b>83%</b>	<b>15 – 19%</b>

Source: Ofcom research on home radio ownership and vehicle figures from the Department for Transport

Note 1: In-home radios includes hi-fis, portable radios and alarm clock radios.

Note 2: data on the number of vehicles on UK roads, as reported by the Department for Transport in September 2013

Note 3: Due to the complexity of estimating the radio set universe, we have included a range of figures based on consumer research conducted in 2010 and GfK retail sales data for 2001-2013.

Note 4: Frequency of listening figures from Ofcom consumer research May 2010

Base: 1075 UK adults

(Q1) How many working (insert type of device) do you have in your household?

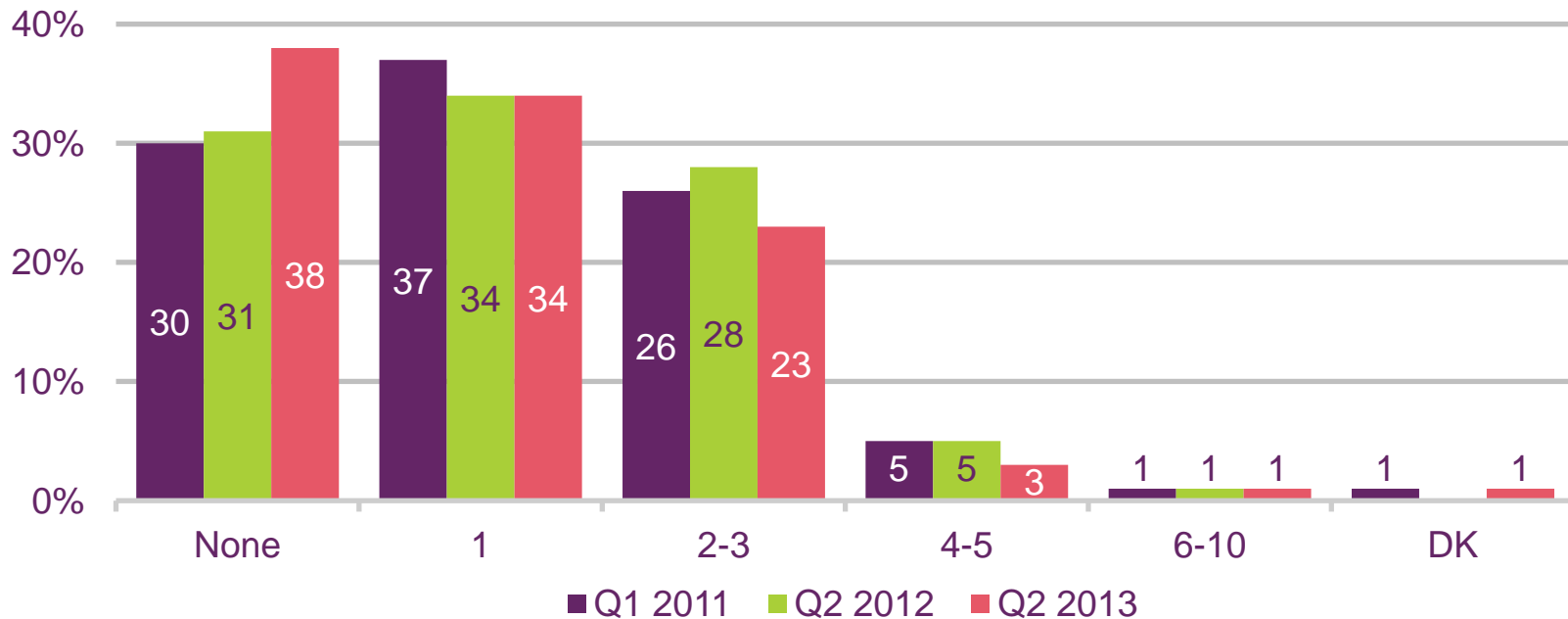
(Q4ii to q6i): How often do you or someone in your household listen to (type of device)?

Note 5: Proportion of home radios including a DAB digital radio tuner draws on GfK sales data

## Figure 10

The number of radio sets in the home that consumers listen to in 'most weeks'

Proportion of households



Source: Ofcom Technology Tracker Wave 2 2013

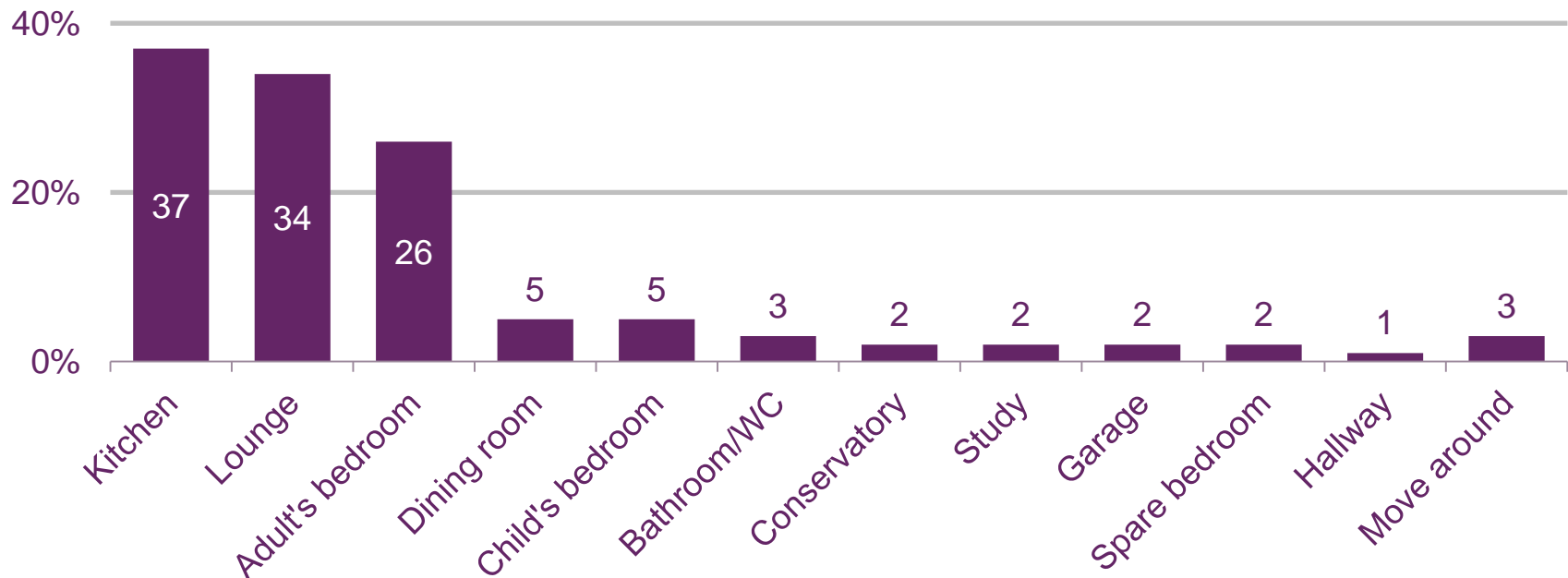
QP8. In total, how many radio sets do you have in your home that you, or someone in your household, listen to in most weeks?

Base: All respondents Q1 2011 (3772), Q2 2012 (2893), Q2 2013 (2879)

## Figure 11

### The location of radio sets in the home

Proportion of respondents



Source: Ofcom Technology Tracker Wave 2 2013

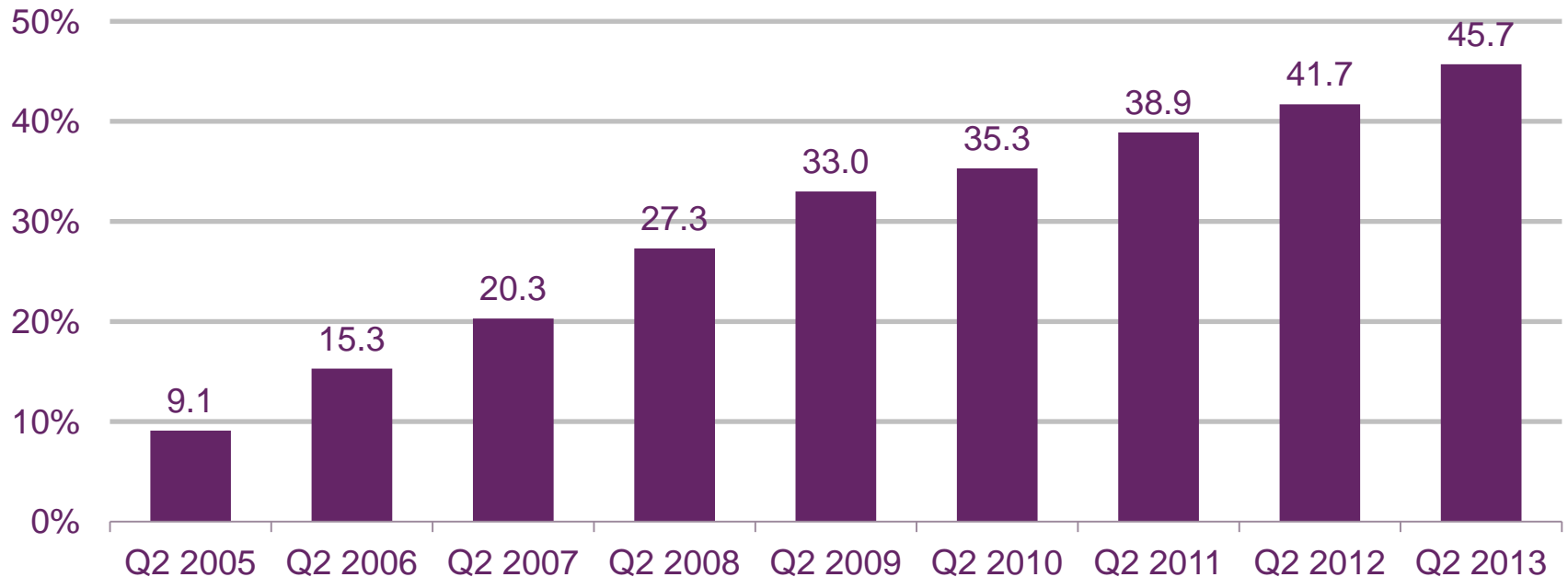
Q4. In which of these rooms at home do you have any radios? Base: All respondents, n=2879

Note: the question wording is not comparable to the 2012 question, which asked about the location of radio sets used 'in most weeks'

## Figure 12

### Proportion of individuals claiming to own a DAB set in the home

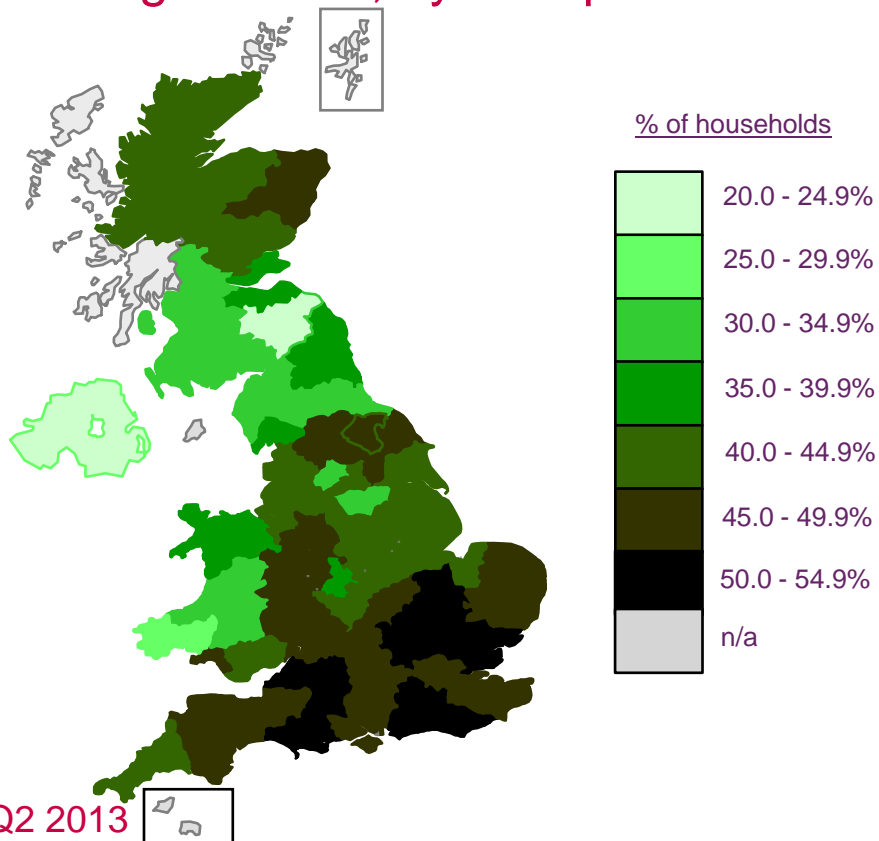
Proportion of adults (15+)



Source: RAJAR / Ipsos MORI / RSMB

# Figure 13

## Take-up of DAB digital radio, by multiplex area



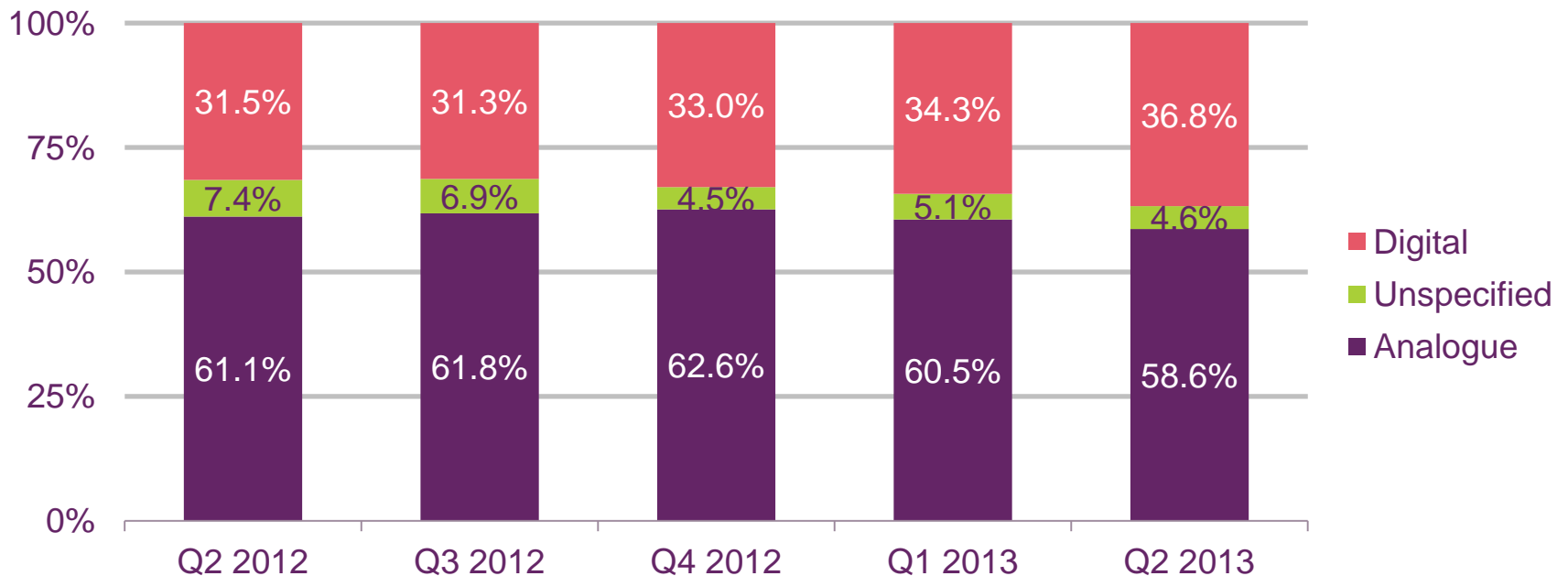
Source: RAJAR, Q2 2013

Note: this map is based on analysis which uses the total survey area of the individual station which best represents the coverage area of each digital multiplex.

## Figure 14

### Distribution of listening hours across analogue and digital platforms, by quarter: Q2 2010 – Q2 2013

Share of total listening hours



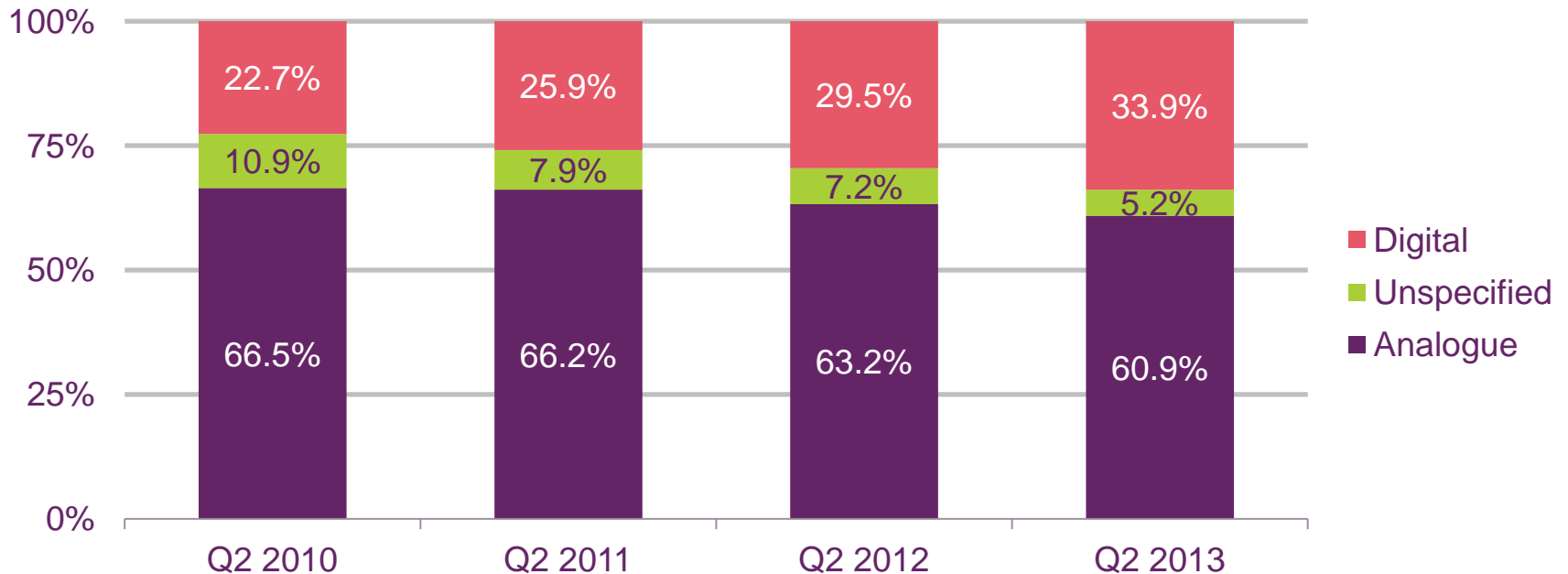
Source: RAJAR. All adults (15+)

Note: 'Unspecified' relates to listening where the radio platform was not confirmed by the listener.

## Figure 15

### Distribution of listening hours across analogue and digital platforms, the 12 months to Q2: 2010-2013

Share of total listening hours



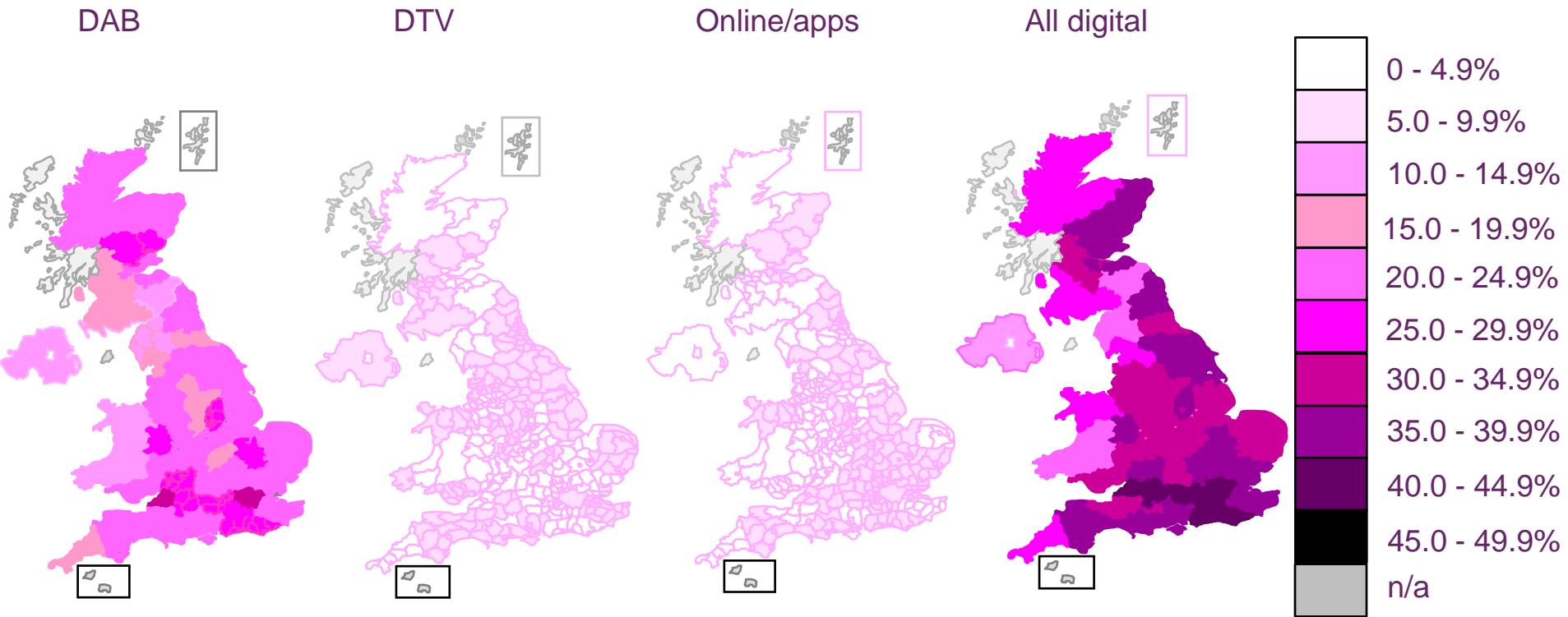
Source: RAJAR. All adults (15+)

Note: Data relate to the year ending each date shown. 'Unspecified' relates to listening where the radio platform was not confirmed by the listener.



# Figure 16

## Share of listening, by digital platform and area



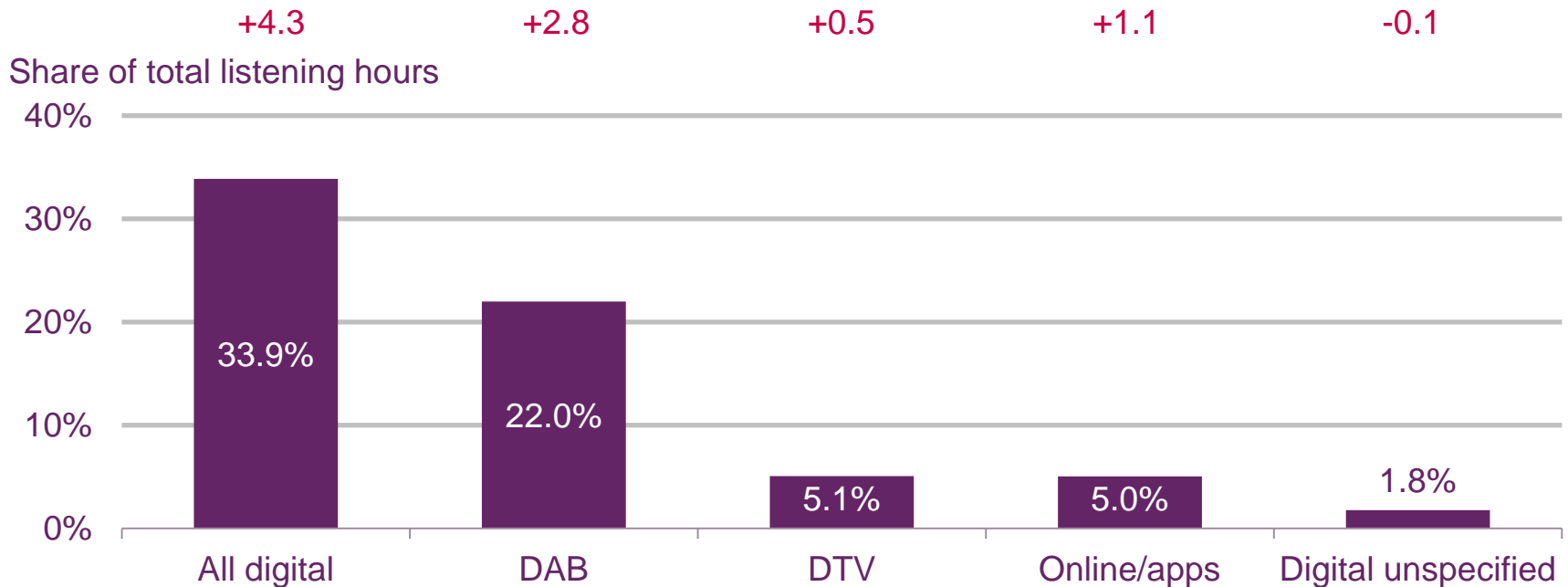
Source: RAJAR, Q2 2013

Note: these maps are based on analysis which uses the total survey area of the individual station which best represents the coverage area of each digital multiplex.

## Figure 17

### Digital radio's share of total radio listening hours, by platform

Year ending Q2 year-on-year change (percentage points)



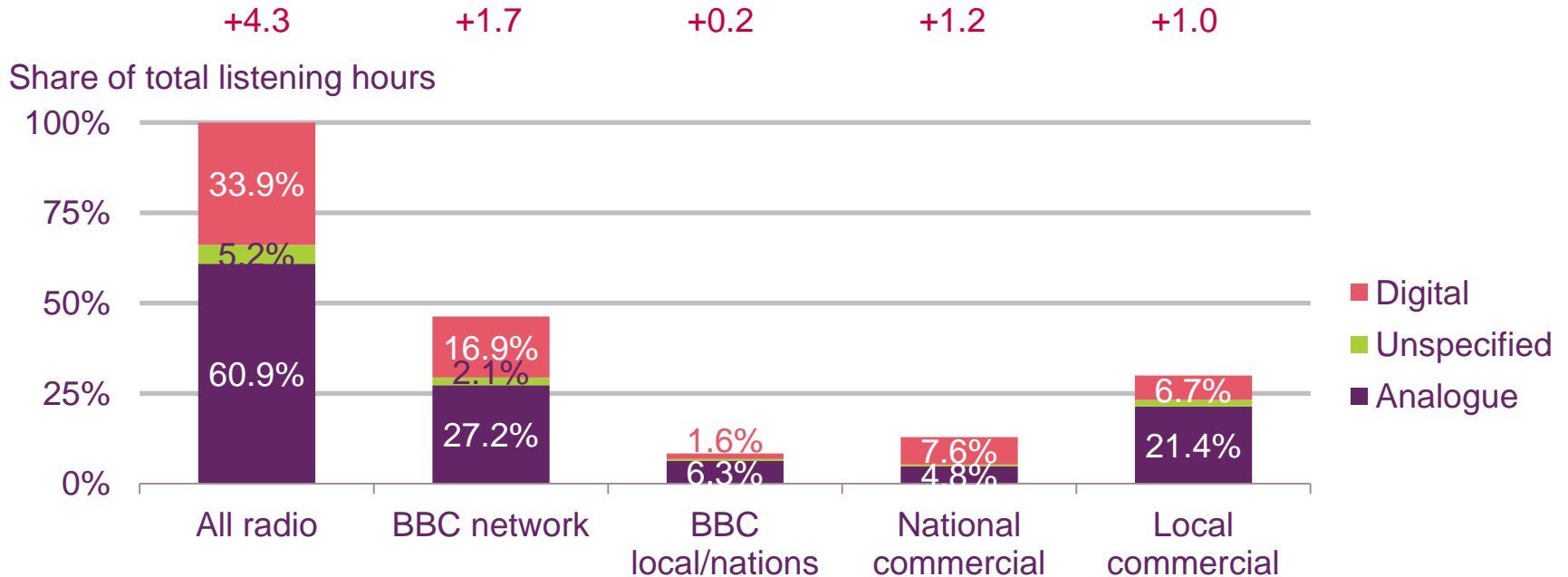
Source: RAJAR. All adults (15+), year ending Q2 2013

Note: 'Digital unspecified' relates to listening to digital-only stations, where the survey respondent has not specified the platform used.

## Figure 18

### Distribution of listening hours, by service provider, analogue and digital platforms: year to Q2 2013

Year ending Q2 year-on-year change in digital share of listening (percentage points)

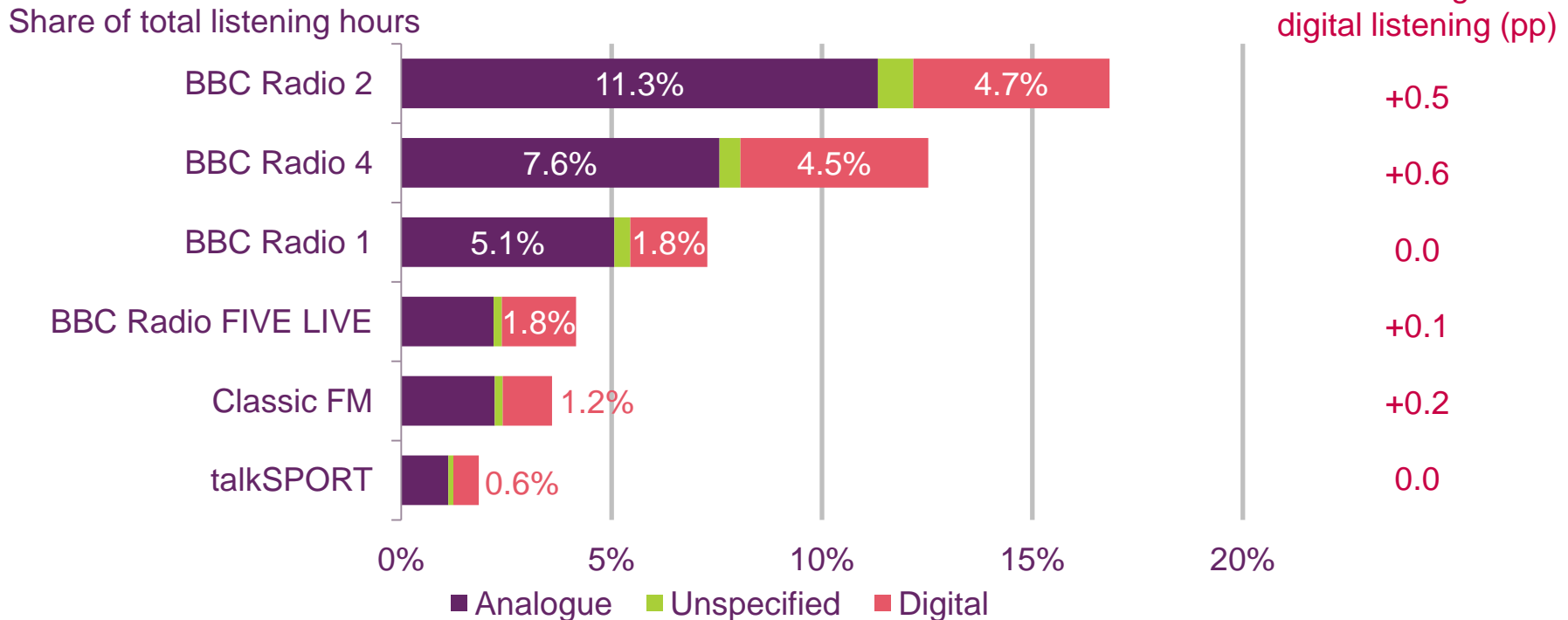


Source: RAJAR. All adults (15+), year ending Q2 2013

Note: 'Unspecified' relates to listening where the radio platform was not confirmed by the listener.

## Figure 19

### Distribution of listening hours, by service, analogue and digital platforms: year to Q2 2012

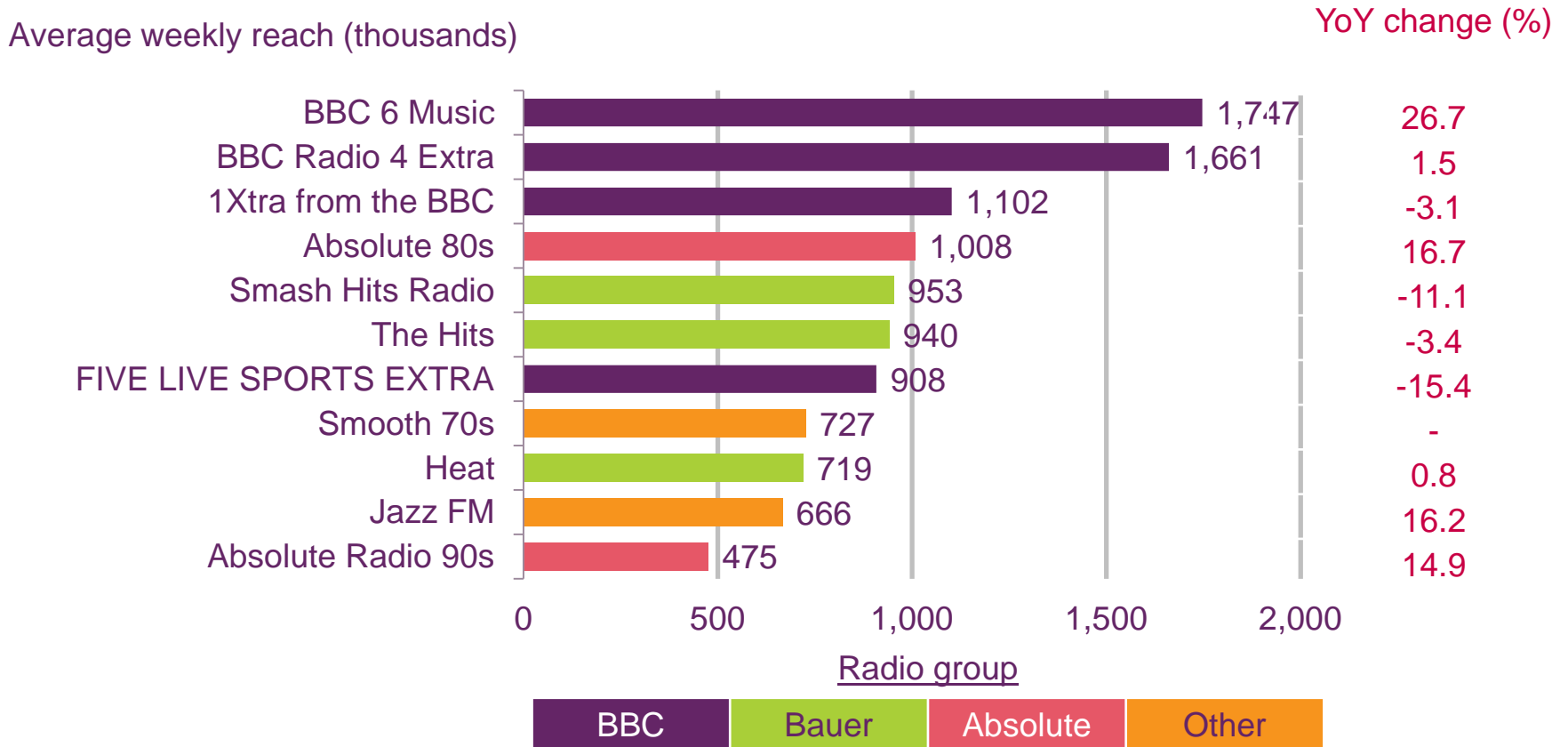


Source: RAJAR. All adults (15+), year ending Q2 2013

Note: 'Unspecified' relates to listening where the radio platform was not confirmed by the listener.

# Figure 20

## Digital-only stations by average weekly reach

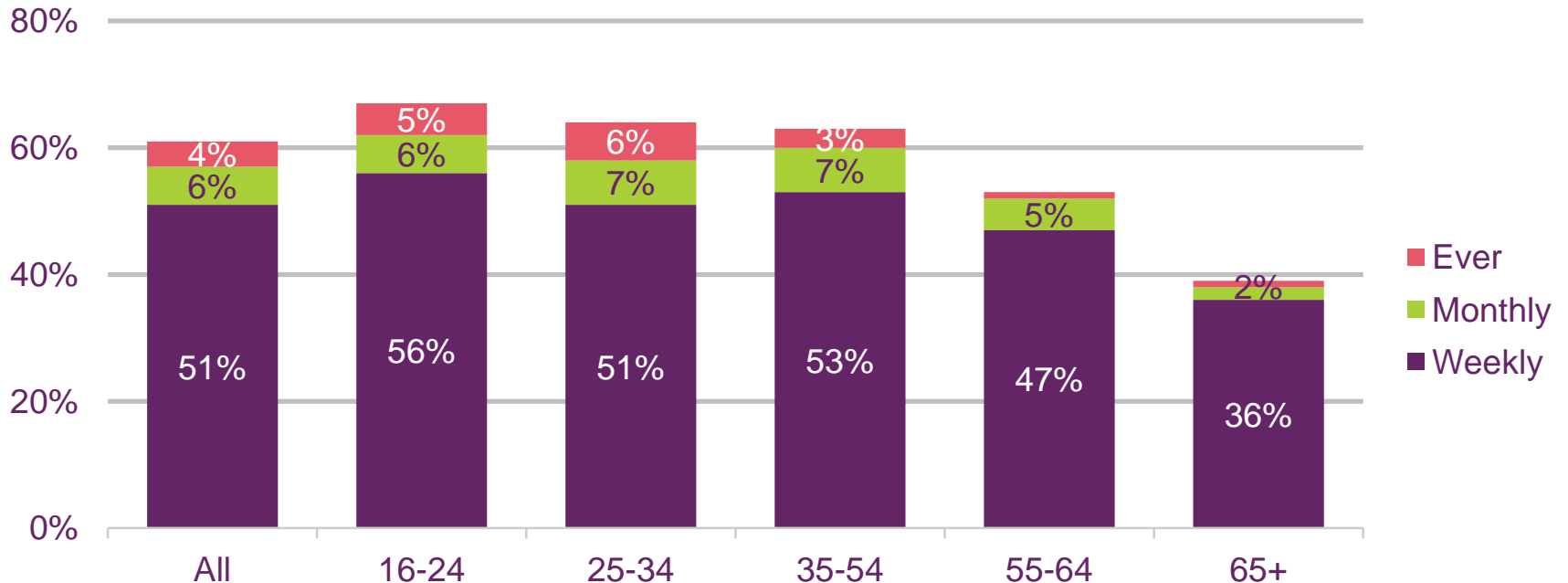


Source: RAJAR. All adults (15+), year ending Q2 2013

## Figure 21

### Proportion of people, by age, who have ever listened to a radio through a digital platform

Digital radio listening by age group (% of total)



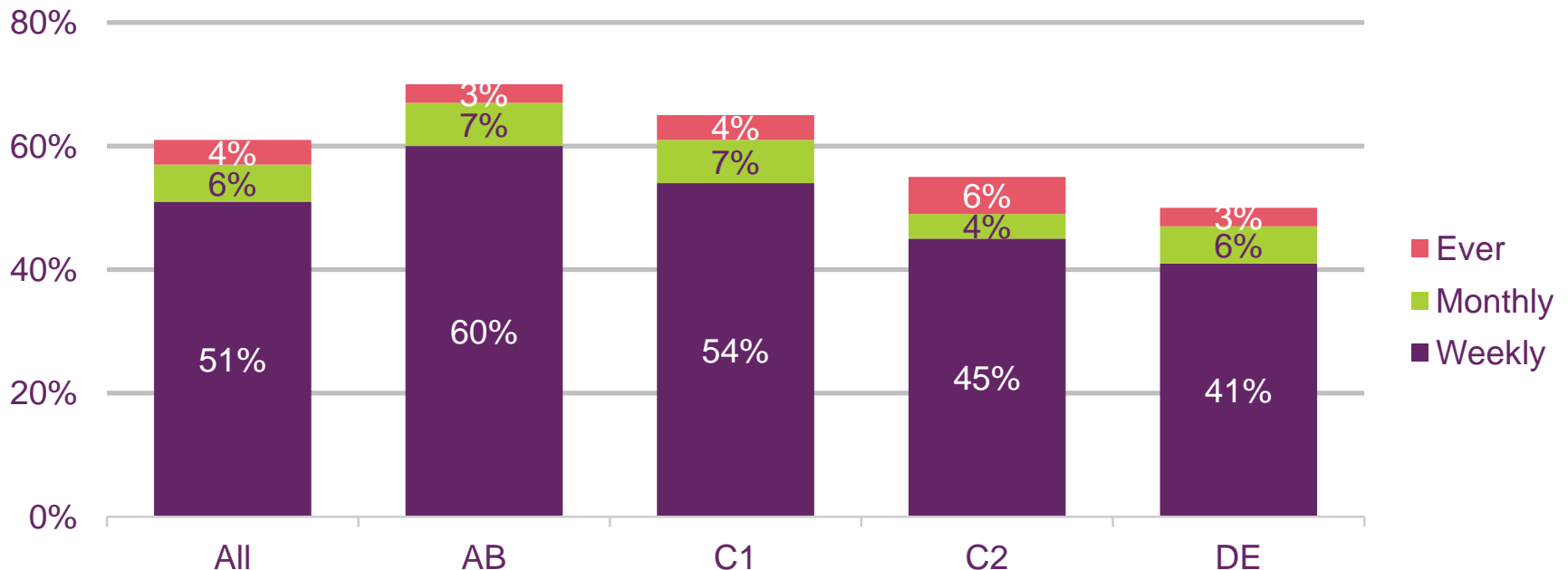
Source: Ofcom Technology Tracker Wave 2 2013

Base: All who listen to the radio (n=2242) Q: Whether ever use digital radio

## Figure 22

### Those who listen to digital radio at least weekly, by socio-economic group

Digital radio listening by socio-economic group (% of total)



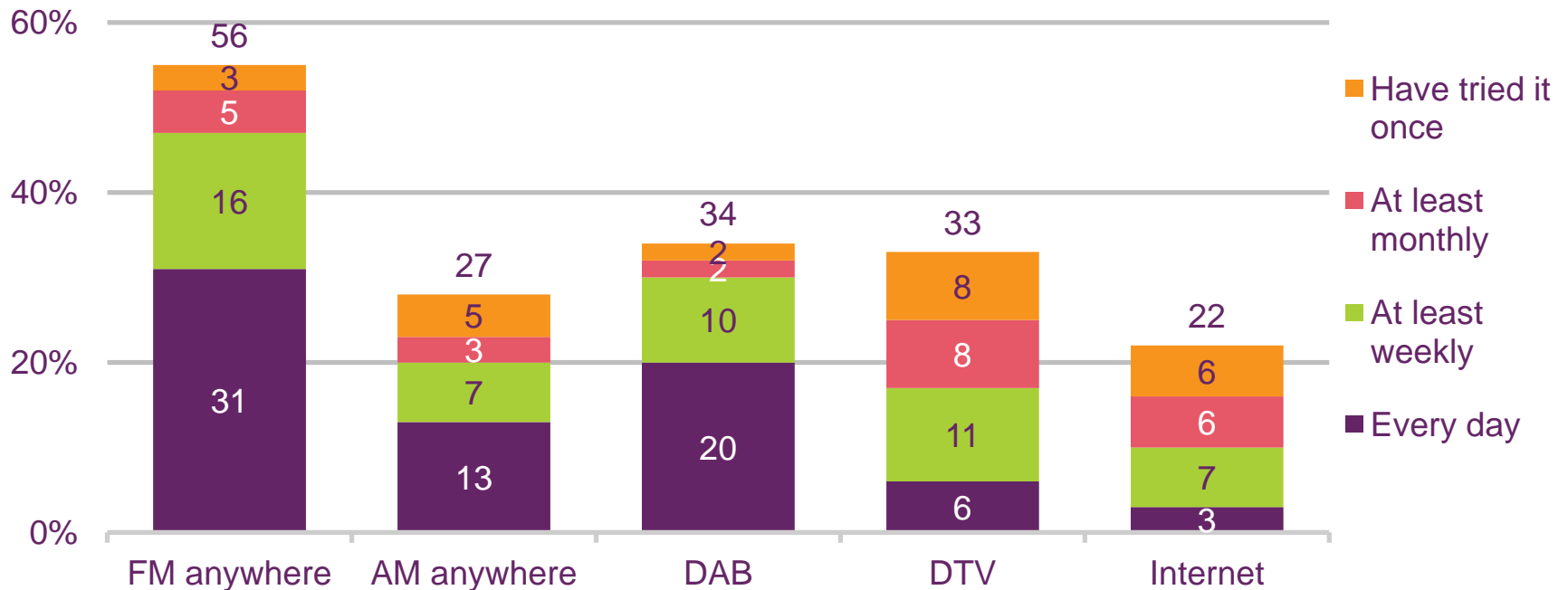
Source: Ofcom Technology Tracker Wave 2 2013

Base: All who listen to the radio (n=2242) Q: Whether ever use digital radio

## Figure 23

### Frequency of radio listening, by platform

Proportion of respondents



Source: Ofcom Technology Tracker Wave 2 2013

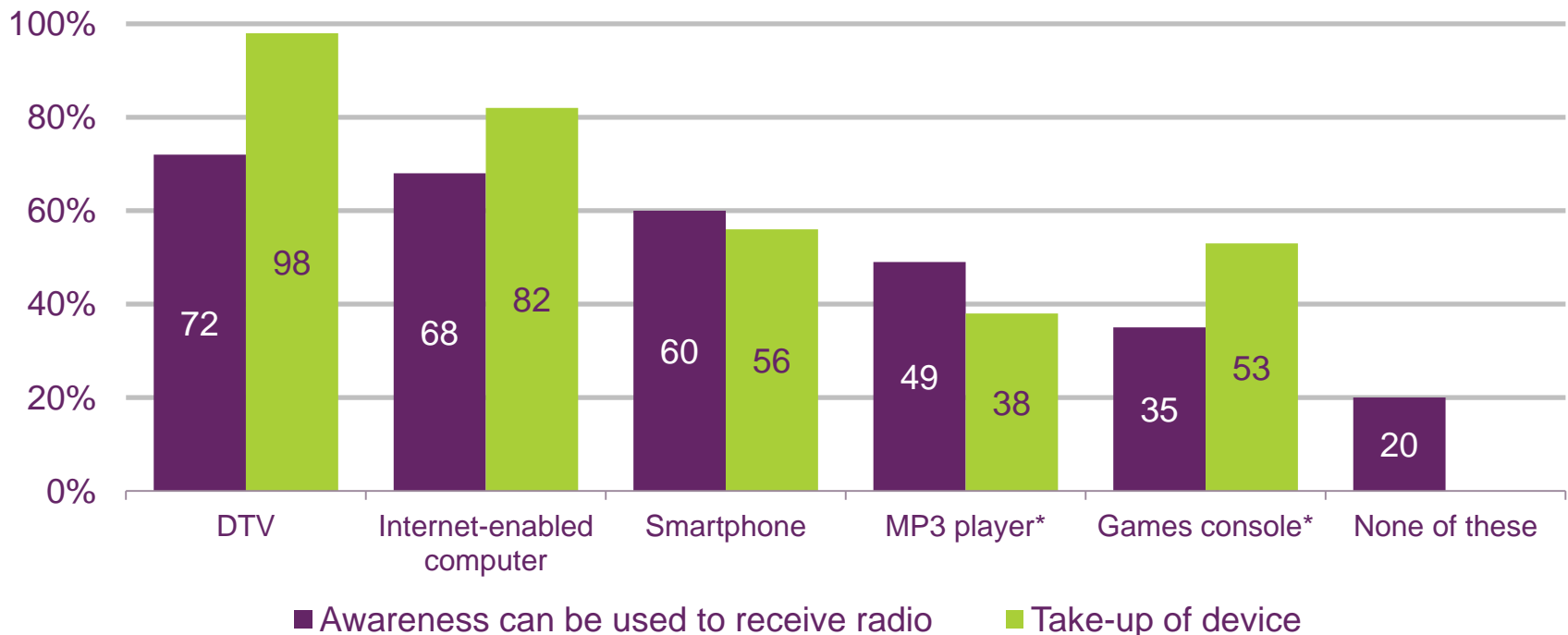
Q4. How often, if at all, do you access the radio via... Base: Adults aged 16+ who listen to radio n = 2242 UK

Note: Remaining percentages are Don't know responses.



## Figure 24

### Awareness of devices capable of receiving digital radio services



Source: Ofcom Technology Tracker Wave 2 2013 \*Take-up measures from Quarter 1 2013

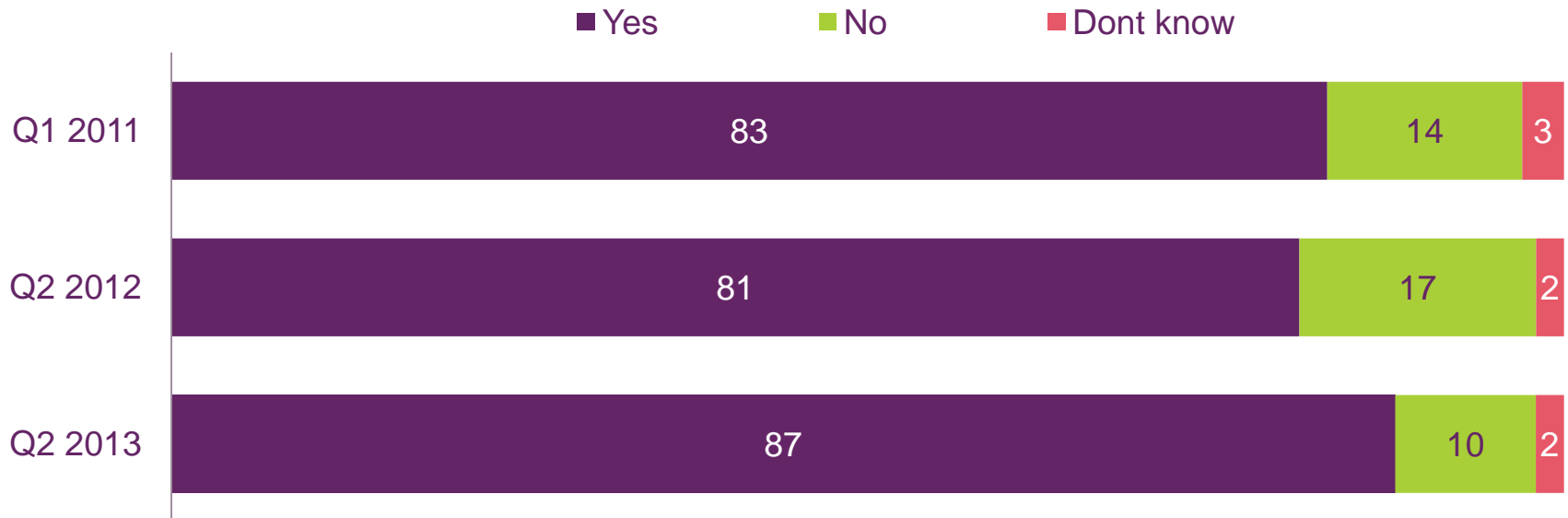
Base: All respondents, n=2879

QP13. Before today were you aware that you can listen to radio programmes as they are broadcast in these ways?

## Figure 25

### Awareness of digital radios, sometimes called 'DAB digital radio'

Before today, had you heard of digital radios, sometimes called D-A-B radios?



Source: Ofcom Technology Tracker, Wave 1 2011, Wave 2 2012, Wave 2 2013

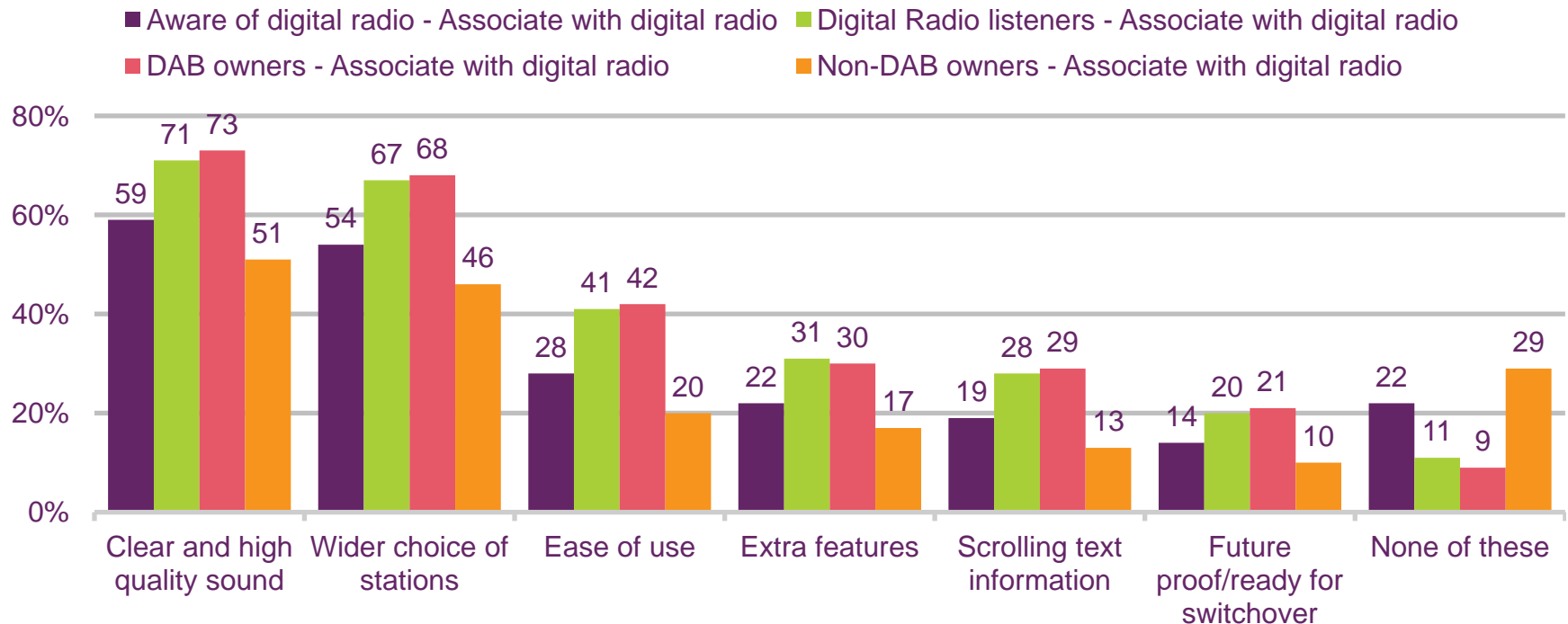
Base: All adults Q3. Before today, had you heard of digital radios, sometimes called D-A-B radios?

Digital radios are sometimes called D-A-B radios and may have ones of these logos (SHOWCARD).

They can receive more radio stations and have a clear signal with no interference. It doesn't simply refer to a radio with a digital display panel.

# Figure 26

## Associations of digital radio among those with and without digital radio



Source: Ofcom Technology Tracker Wave 2 2013

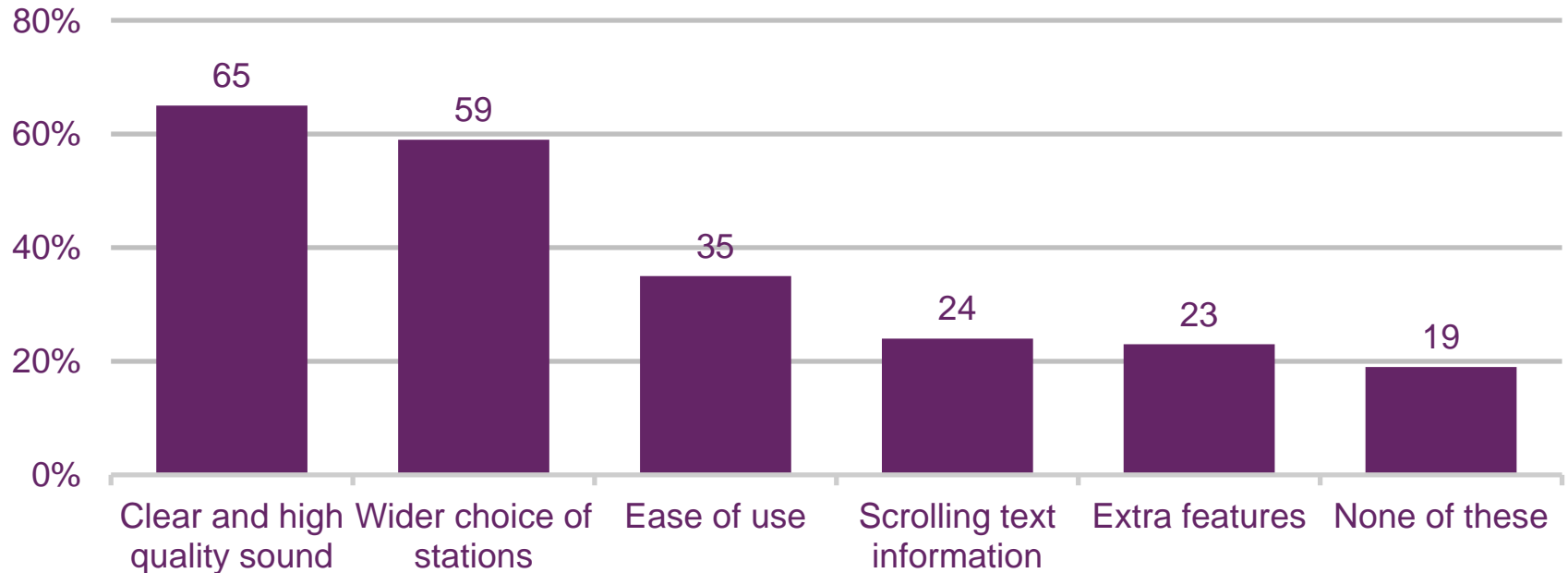
QP14. Which if any of these features did you associate with digital radio?

Base: All aware of digital radio, with experience of listening or aware of way of listening; all with any type of digital radio n=2628; n=1279; n=904; n=1708

## Figure 27

### Features of digital radio that listeners have experienced

Proportion of digital radio listeners



Source: Ofcom Technology Tracker Wave 2 2013

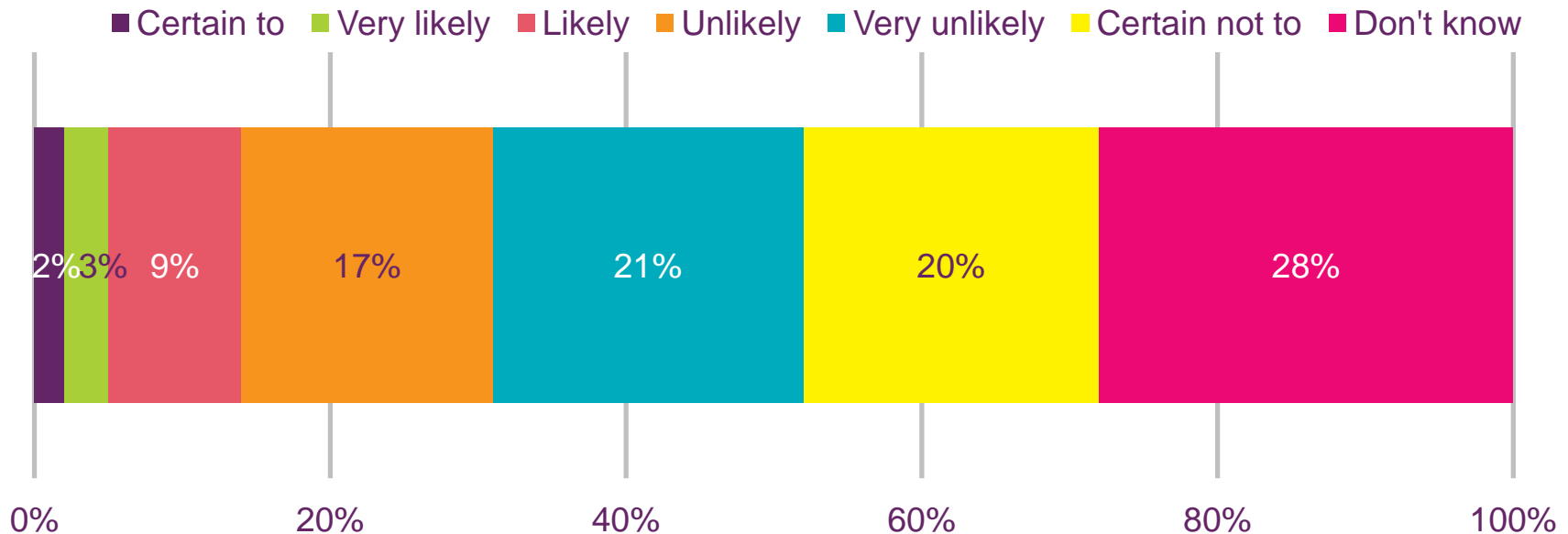
QP15. As a digital radio listener which, if any, of these features of digital radio have you experienced?

Base: All with any type of DAB digital radio (in home or vehicle) n=1104

## Figure 28

### Likelihood of purchasing a DAB set

Percentage of respondents who listen to the radio, have any active radio sets at home but have no DAB set in the home



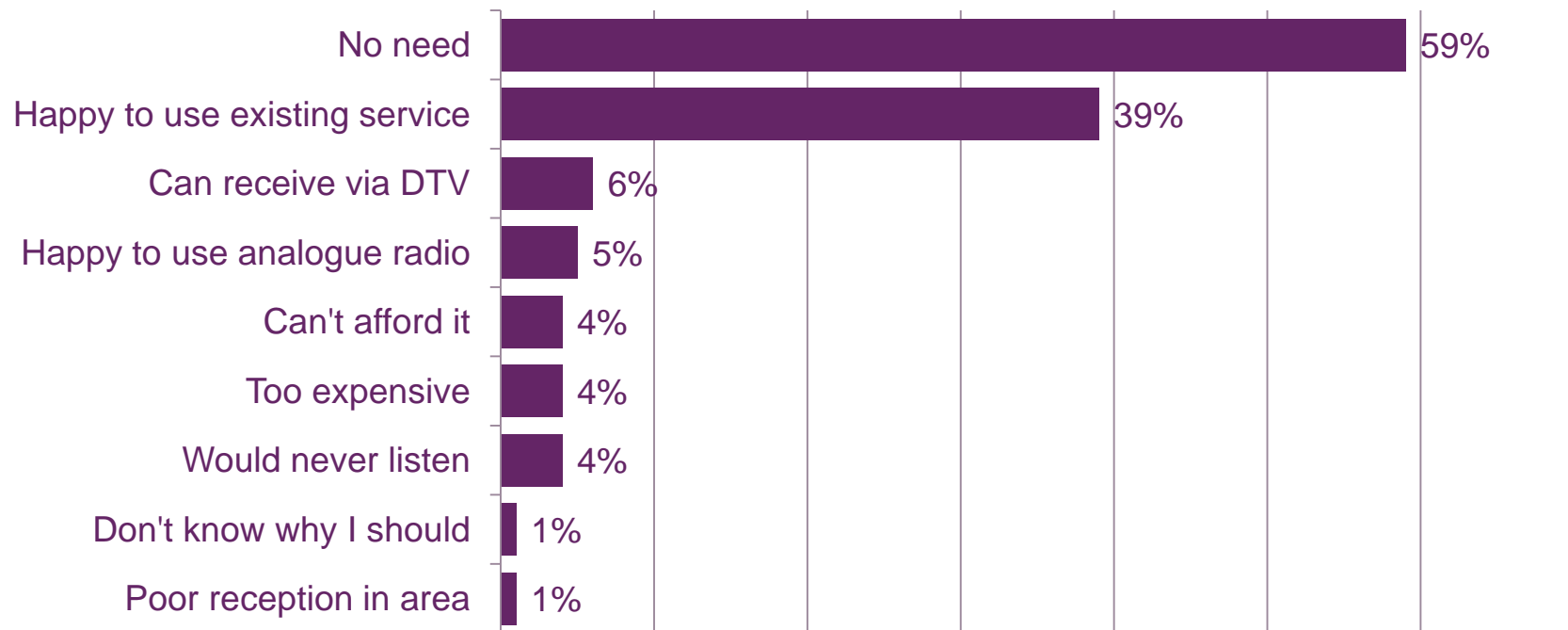
Source: Ofcom Technology tracker, Wave 2 2013

Base: Those who listen to the radio but have no DAB sets in the home (n=784)

QP12: How likely is it that your household will get a DAB radio in the next 12 months?

## Figure 29

### Reasons for not acquiring a DAB digital radio set



Source: Ofcom Technology tracker, Wave 2 2013

Base: Radio listeners who said they were unlikely to get a DAB radio in the next 12 months

Q: Why are you unlikely to get a DAB radio in the next 12 months?