

ICMR 2015: Radio and audio

Chart pack

Figure 4.1

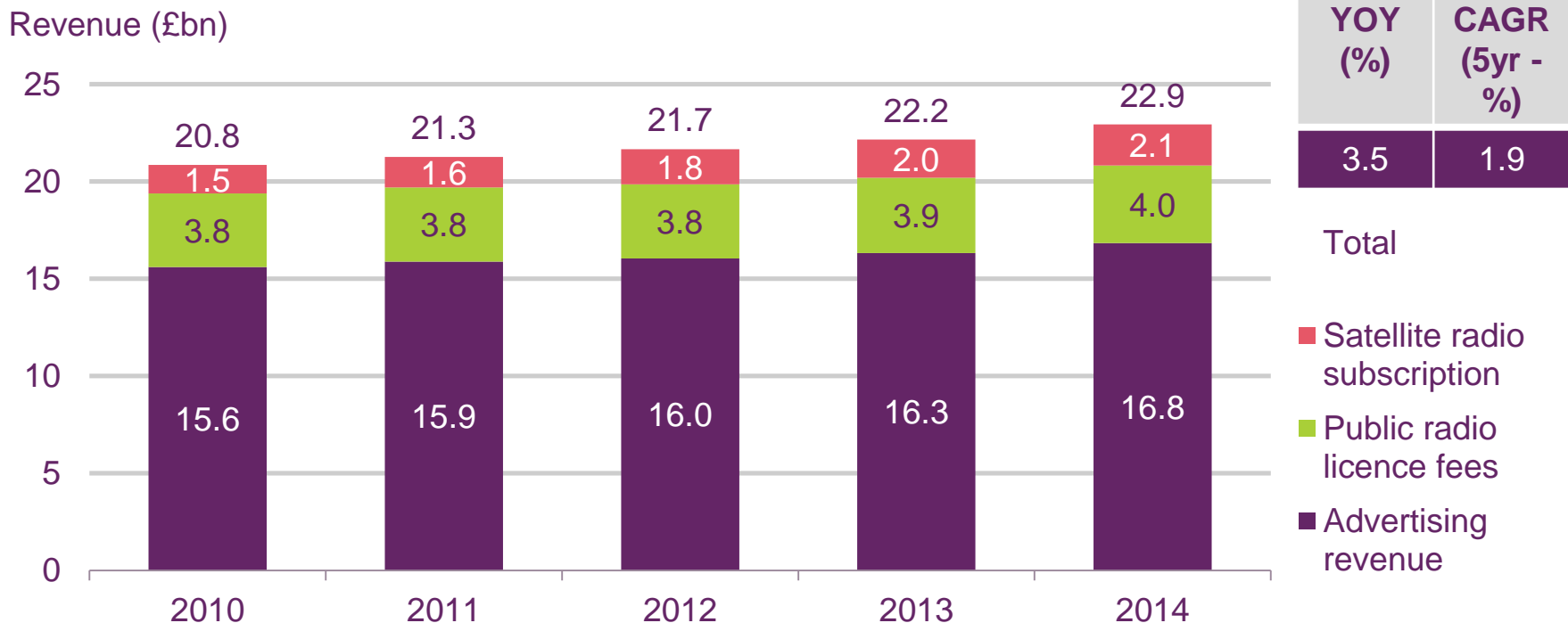
Key radio metrics: 2014

	UK	FRA	GER	ITA	USA	JPN	AUS	ESP	NED	SWE	POL	SGP	KOR	BRA	RUS	IND	CHN	NGA
Total industry revenue (£bn)	1.2	1.1	3.0	0.4	12.5	0.7	0.6	0.3	0.3	0.3	0.1	0.1	0.2	0.3	0.3	0.2	1.3	0.1
Revenue change (% YOY)	3.6	1.9	3.4	-1.5	3.4	-2.4	3.1	1.9	1.3	5.7	0.4	4.0	2.8	4.3	7.0	14.0	9.8	4.5
Revenues per capita (£)	18.7	16.7	36.4	5.9	39.3	5.5	26.3	7.4	16.0	29.4	2.7	16.0	3.1	1.6	2.0	0.2	1.0	0.3
% income from public licence fees	60.0	38.9	79.3	23.5	N/A	5.2	N/A	N/A	30.6	78.1	6.5	N/A	22.3	N/A	N/A	N/A	N/A	N/A

Sources: Ofcom, PwC. All figures are nominal.

Figure 4.2

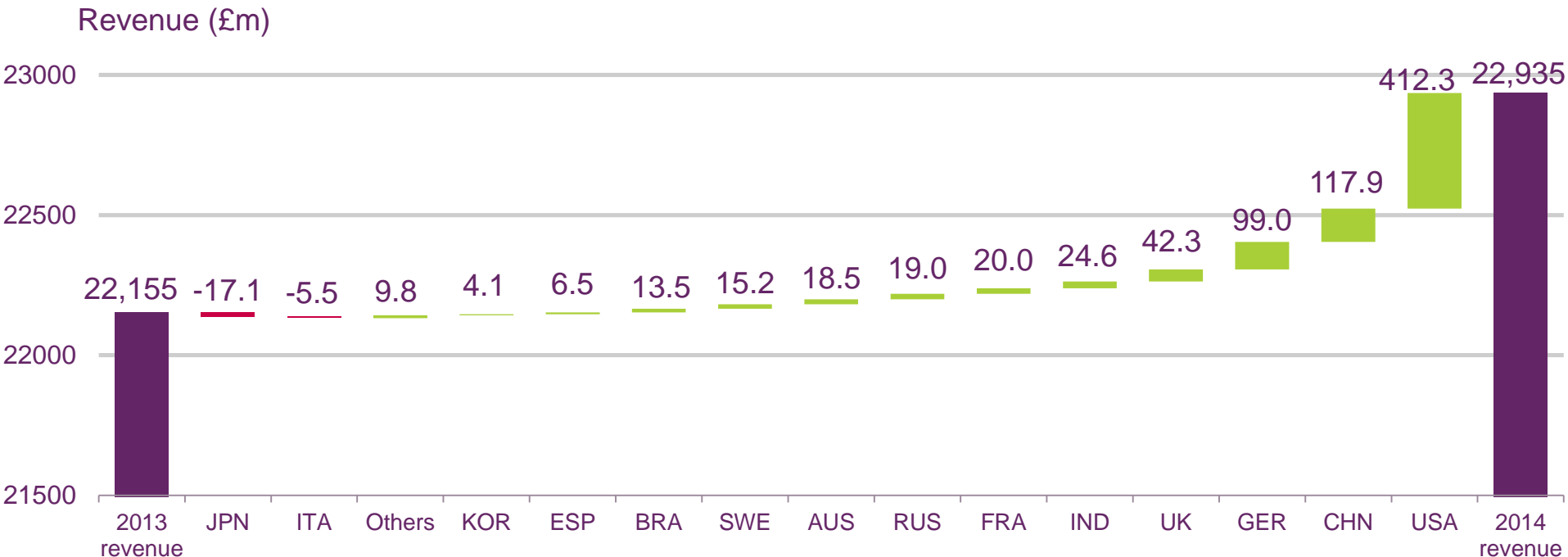
Total radio revenues for the 18 comparator countries



Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2015-2019 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.648 to the GBP, representing the IMF average for 2014. Note that the UK radio industry figure is sourced from broadcaster returns made to Ofcom. All figures expressed in nominal terms.

Figure 4.3

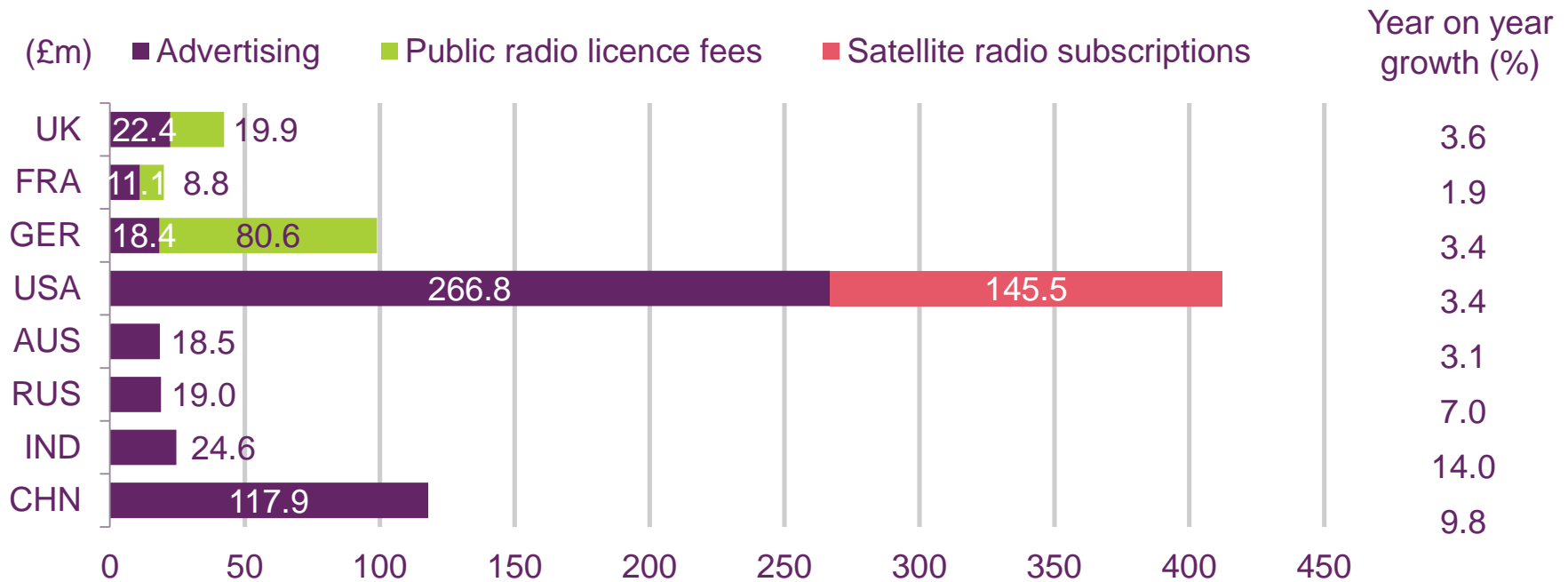
Absolute changes in radio revenue, by country: 2013-2014



Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2015-2019 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.648 to the GBP, representing the IMF average for 2014. 'Others' are the comparator countries not set out in the chart where revenue change was smaller than £4m. Note that the UK radio industry figure is sourced from broadcaster returns made to Ofcom. All figures expressed in nominal terms.

Figure 4.4

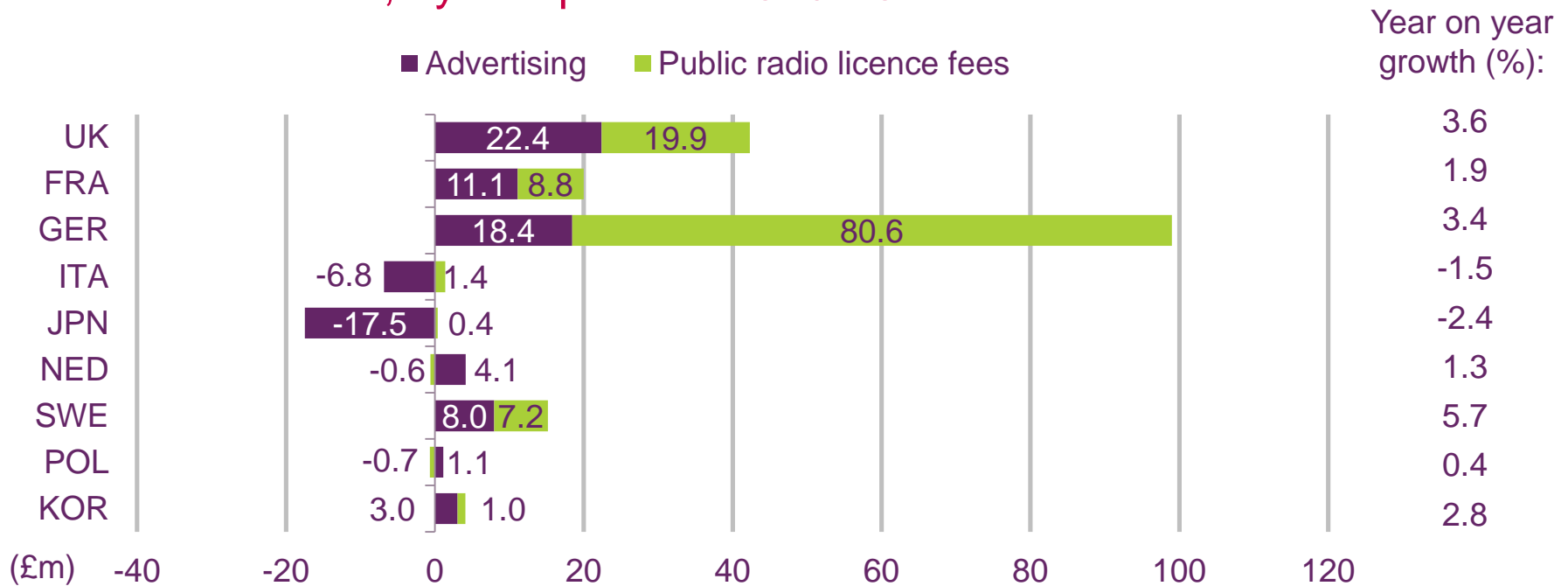
The most substantial absolute increases in radio revenue, by component: 2013-2014



Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2015-2019 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.648 to the GBP, representing the IMF average for 2014. Note that the UK radio industry figure is sourced from broadcaster returns made to Ofcom. All figures expressed in nominal terms

Figure 4.5

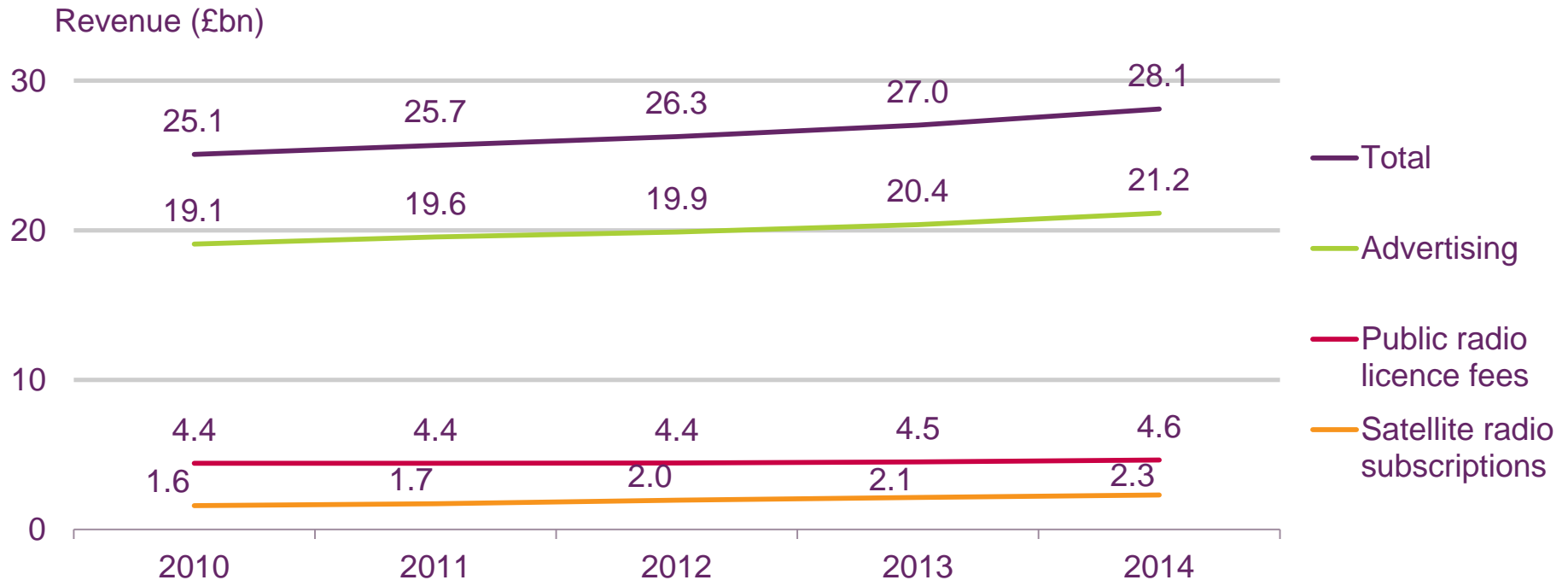
Absolute changes in radio revenue among comparator countries with public radio licence fees, by component: 2013-2014



Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2015-2019 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.648 to the GBP, representing the IMF average for 2014. Note that the UK radio industry figure is sourced from broadcaster returns made to Ofcom. All figures expressed in nominal terms.

Figure 4.6

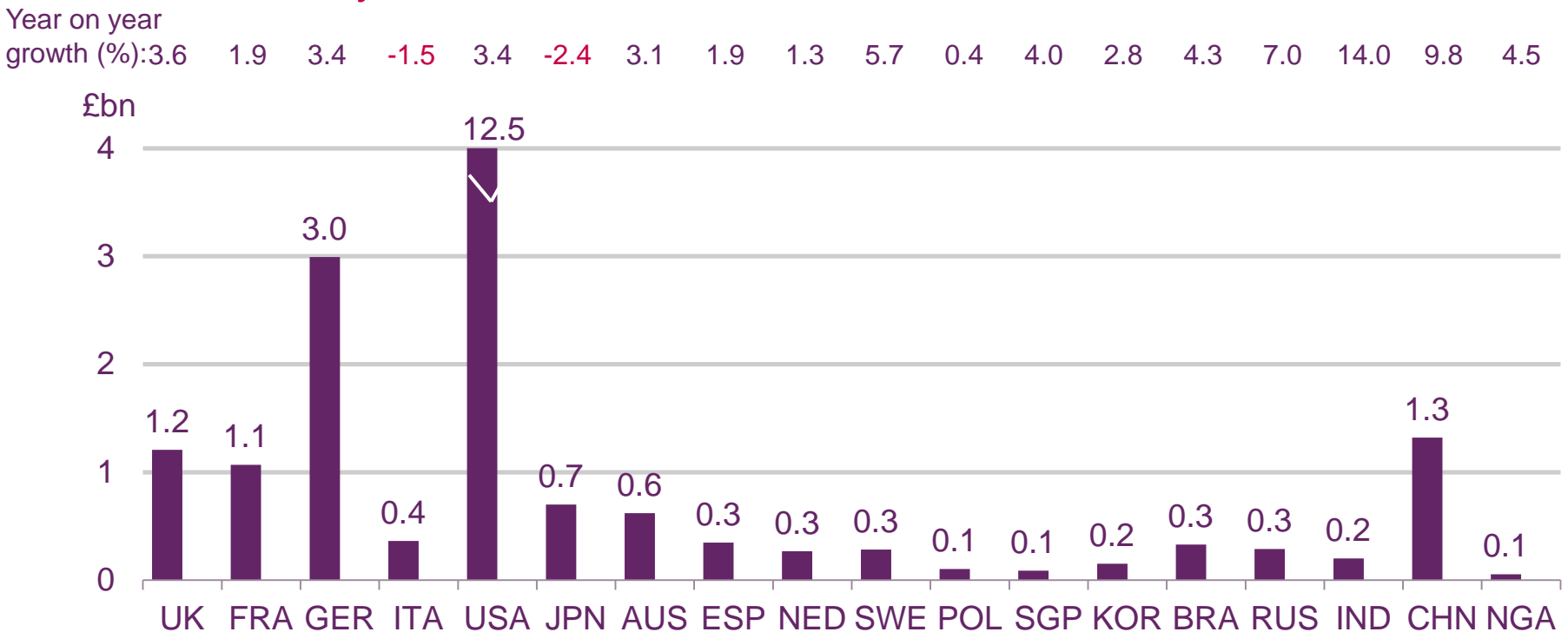
Global radio revenues: 2010-2014



Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2015-2019 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.648 to the GBP, representing the IMF average for 2014. All figures expressed in nominal terms.

Figure 4.7

Radio industry revenues: 2014

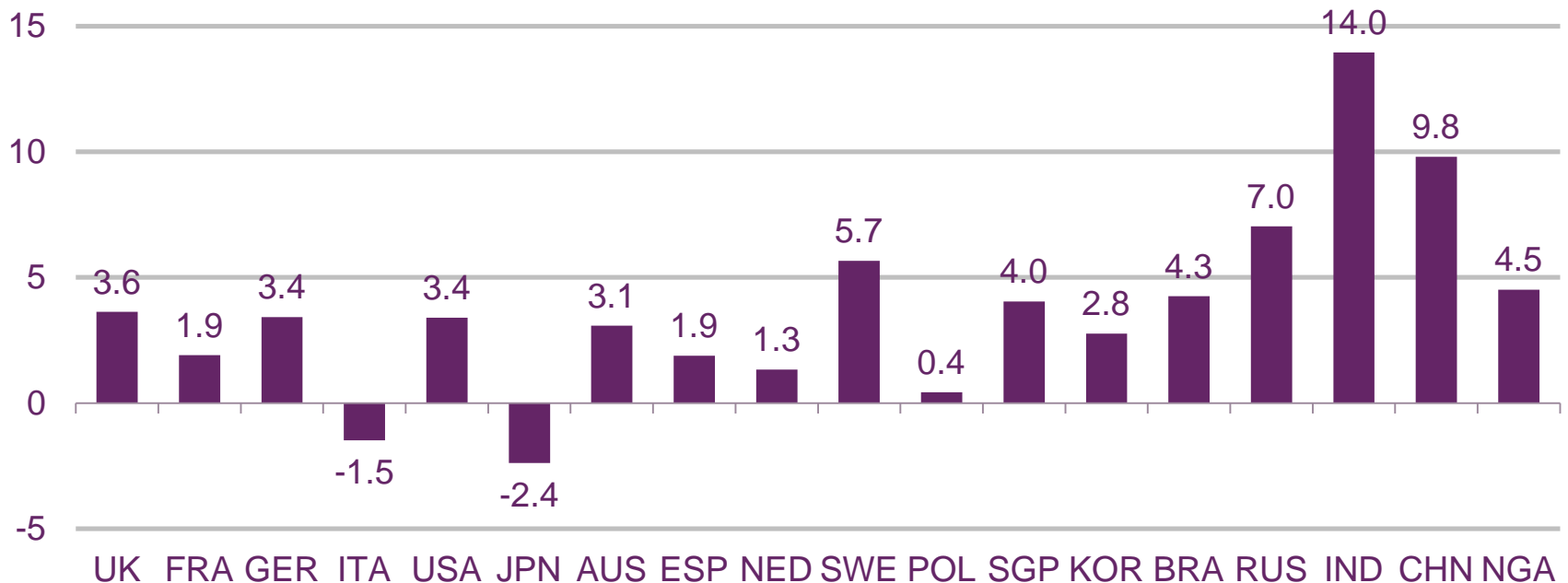


Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2015-2019 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.648 to the GBP, representing the IMF average for 2014. Note that the UK radio industry figure is sourced from broadcaster returns made to Ofcom. All figures expressed in nominal terms

Figure 4.8

Radio industry revenue annual growth: 2013-2014

Annual growth (%)

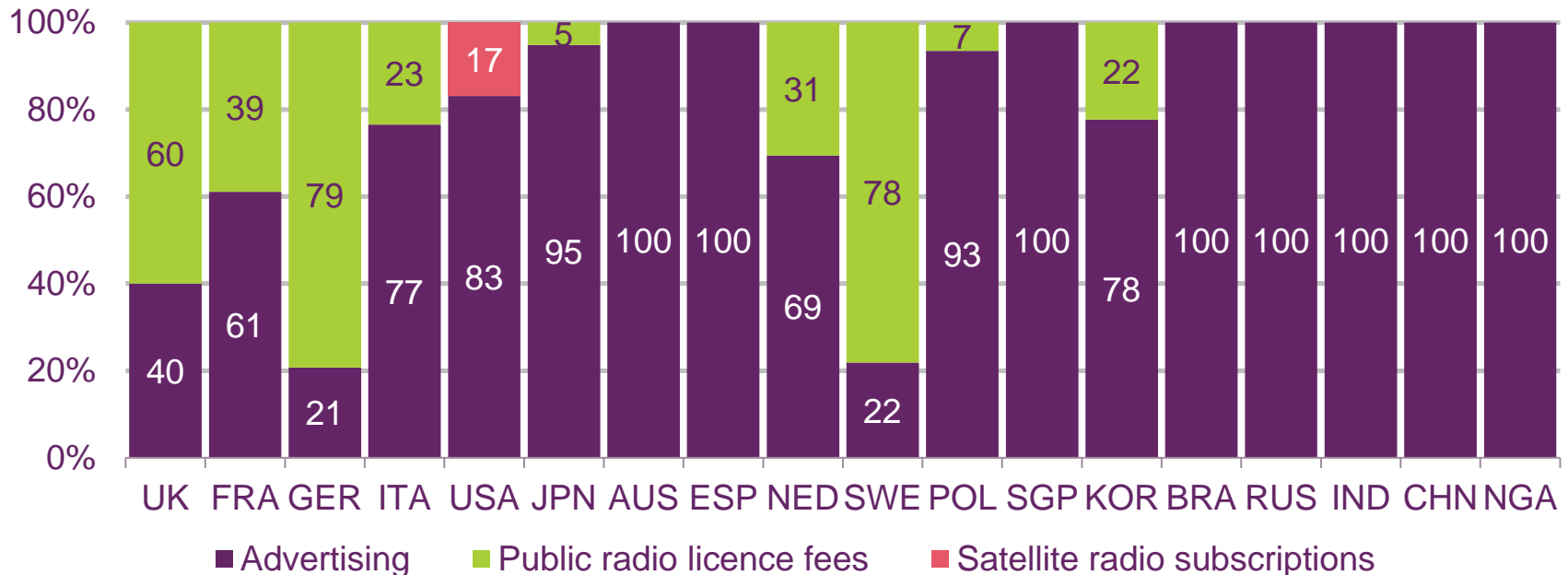


Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2015-2019 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.648 to the GBP, representing the IMF average for 2014. Note that the UK radio industry figure is sourced from broadcaster returns made to Ofcom. All figures expressed in nominal terms.

Figure 4.9

Proportion of radio revenue, by source

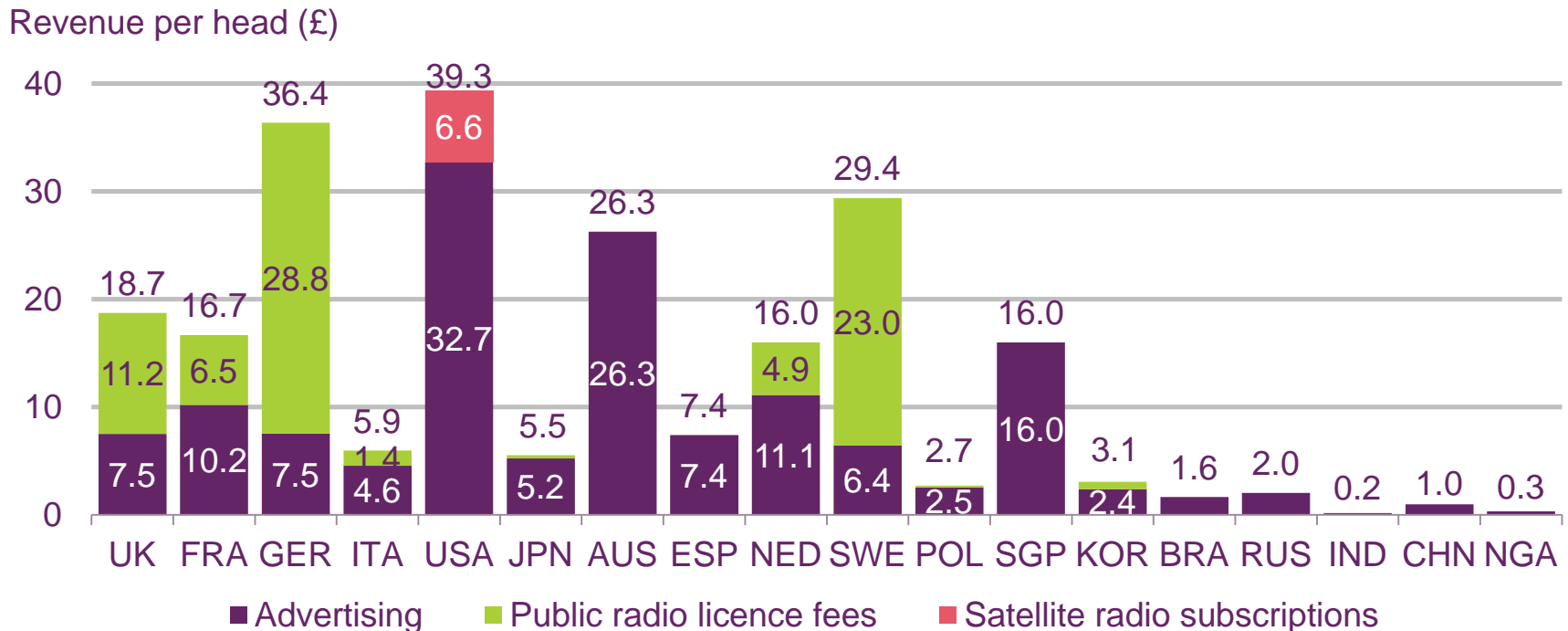
Proportion of total revenue (%)



Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2015-2019 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.648 to the GBP, representing the IMF average for 2014. Note that the UK radio industry figure is sourced from broadcaster returns made to Ofcom. (2) In Australia, advertising revenue is shown as the sole source of radio revenue. Although there is no licence fee to fund radio or television broadcasting in Australia, the Australian Broadcasting Corporation (ABC) is funded by the Australian Government as part of its budget each year, so publicly-funded radio services are available in Australia.

Figure 4.10

Radio industry revenues, per head of population: 2014



Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2015-2019 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.648 to the GBP, representing the IMF average for 2014. Note that the UK radio industry figure is sourced from broadcaster returns made to Ofcom.

Figure 4.11

Number of radio stations, by country: 2009-2014

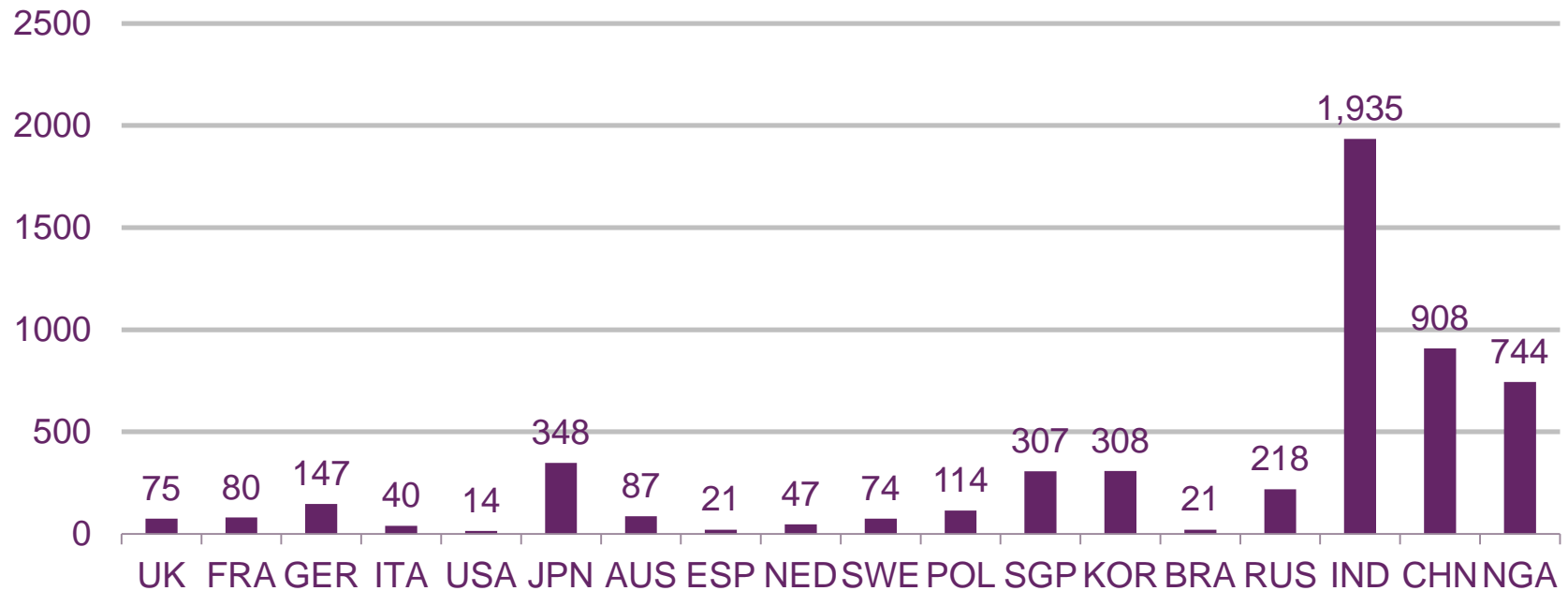
	UK	FRA	GER	ITA	USA	JPN	AUS	ESP	NED	SWE	POL	SGP	KOR	BRA	RUS	IND	CHN	NGA
2009	769	794	518	-	21,439	372	-	0	349	120	305	19	151	8163	638	477	372	77
2010	745	794	518	-	21,609	372	-	0	349	120	318	19	151	8,601	638	481	465	96
2011	762	794	518	-	21,889	372	273	0	349	134	323	19	151	9,184	638	486	581	120
2012	772	794	518	-	22,080	372	273	0	349	134	326	19	151	9,479	638	522	726	150
2013	803	814	518	1,527	22,173	372	273	2,258	349	134	332	19	151	9,589	638	618	907	188
2014	859	800	561	1,539	22,492	365	273	2,239	360	130	335	18	161	9,629	653	655	1,506	240

Source: IHS/Ofcom

Figure 4.12

Population per radio station: 2014

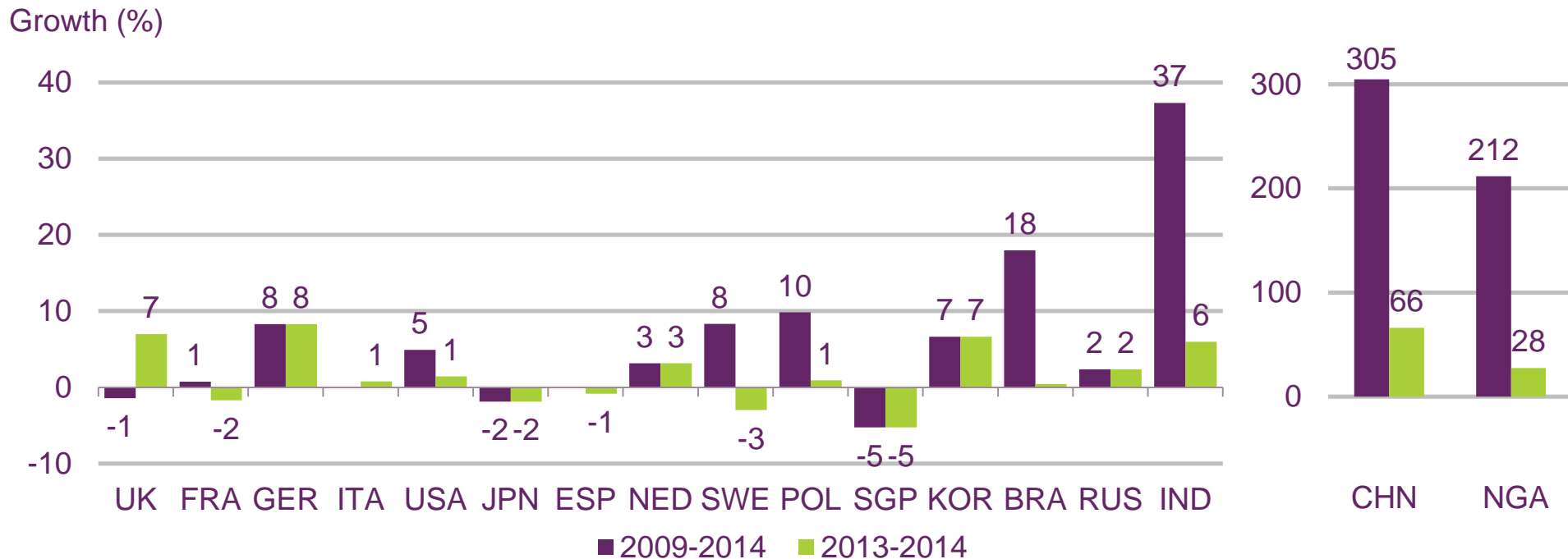
Population per radio station (000s)



Source: IHS/Ofcom

Figure 4.13

Growth in the number of broadcast radio stations: 2009-2014



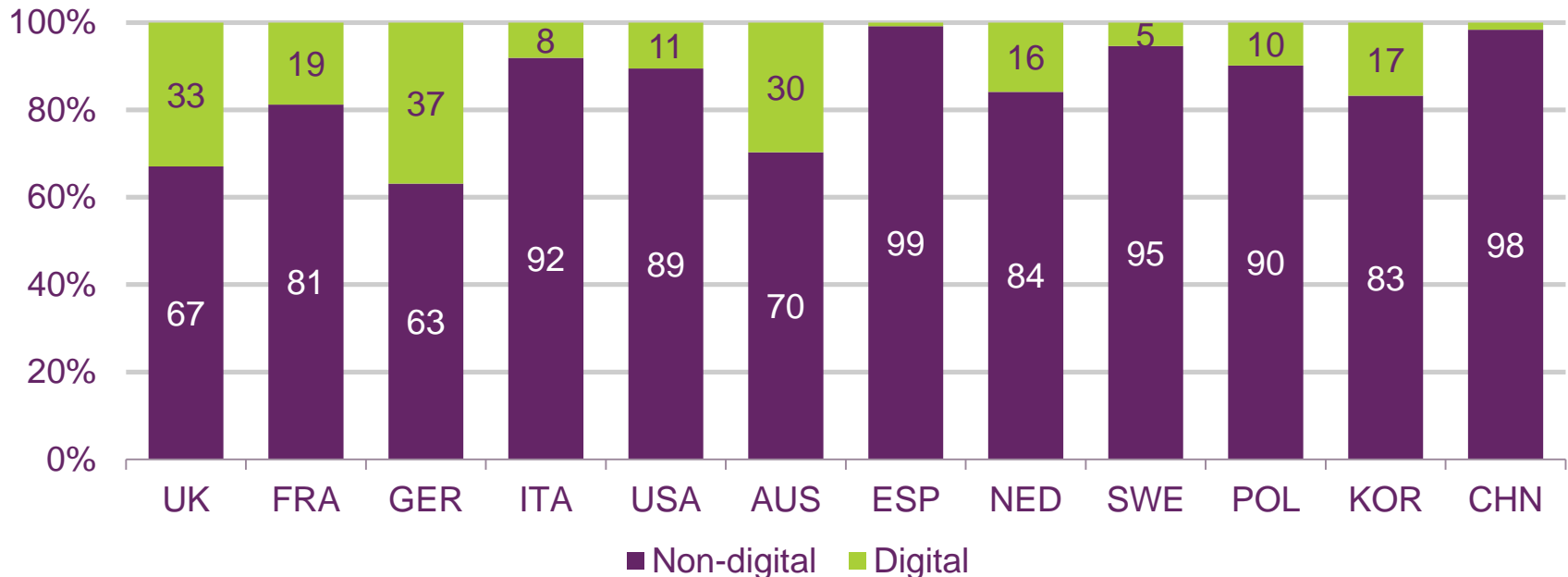
Source: IHS/Ofcom

Note: Data for ITA and ESP for 2009 were not available. There was no change in the number of stations for AUS so these series are not included on the chart.

Figure 4.14

Proportion of digital broadcast stations to analogue broadcast stations, in countries with stations broadcasting digitally: 2014

Proportion of digital / non-digital stations (%)



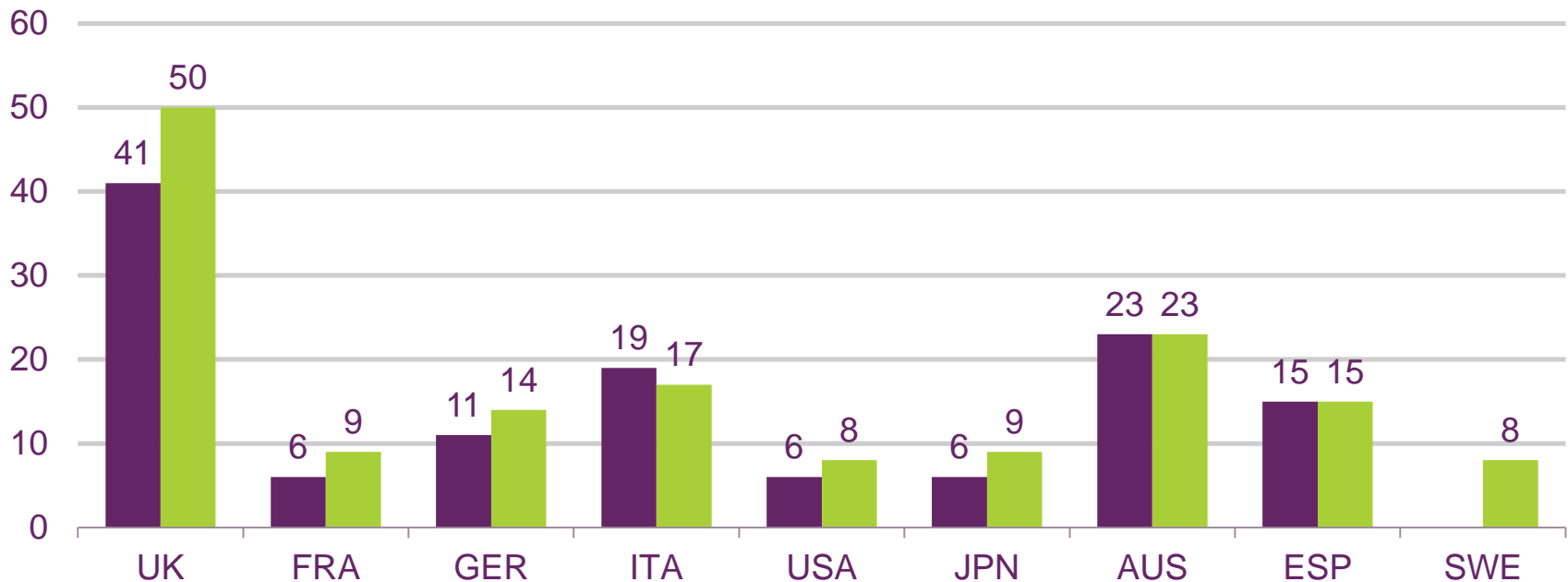
Source: IHS/Ofcom

Note: Where stations are broadcast digitally as well as on analogue, these are counted twice. (2) 'Digital broadcast stations' include DAB, DAB+, DMB and HD Radio.

Figure 4.15

Take-up of digital radio sets among regular radio listeners: 2015

Radio listeners (%)



Source: Ofcom consumer research September – October 2015

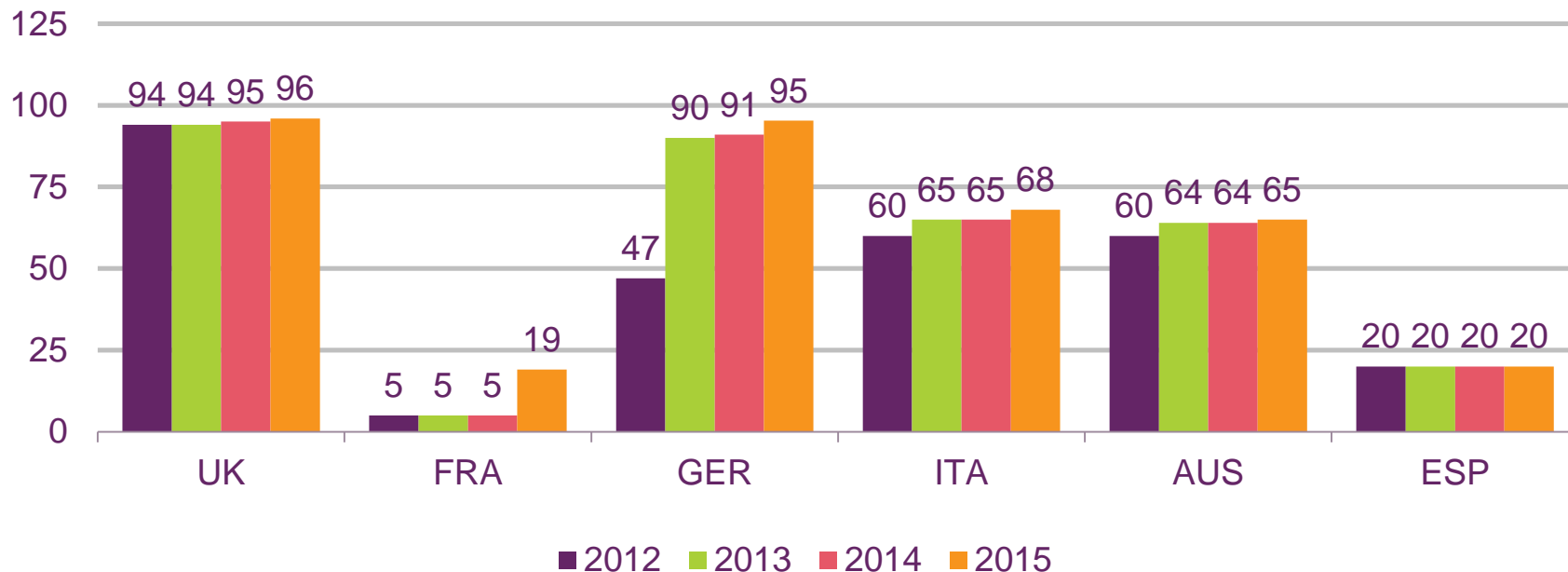
Base: Regular radio listeners, UK=648, FRA=709, GER=778, ITA=727, USA=610, JPN=358, AUS=622, ESP=707, SWE=616

Q.3a Which of the following devices do you have in your home? Notes: (1) Digital radio sets include DAB and DRM. (2) In Japan, digital radio is broadcasted using ISDB radio technology, and in the US, HD radio technology is used.

Figure 4.16

Population coverage of DAB/ DAB+/ DMB digital radio: 2012-2015

Population coverage (%)



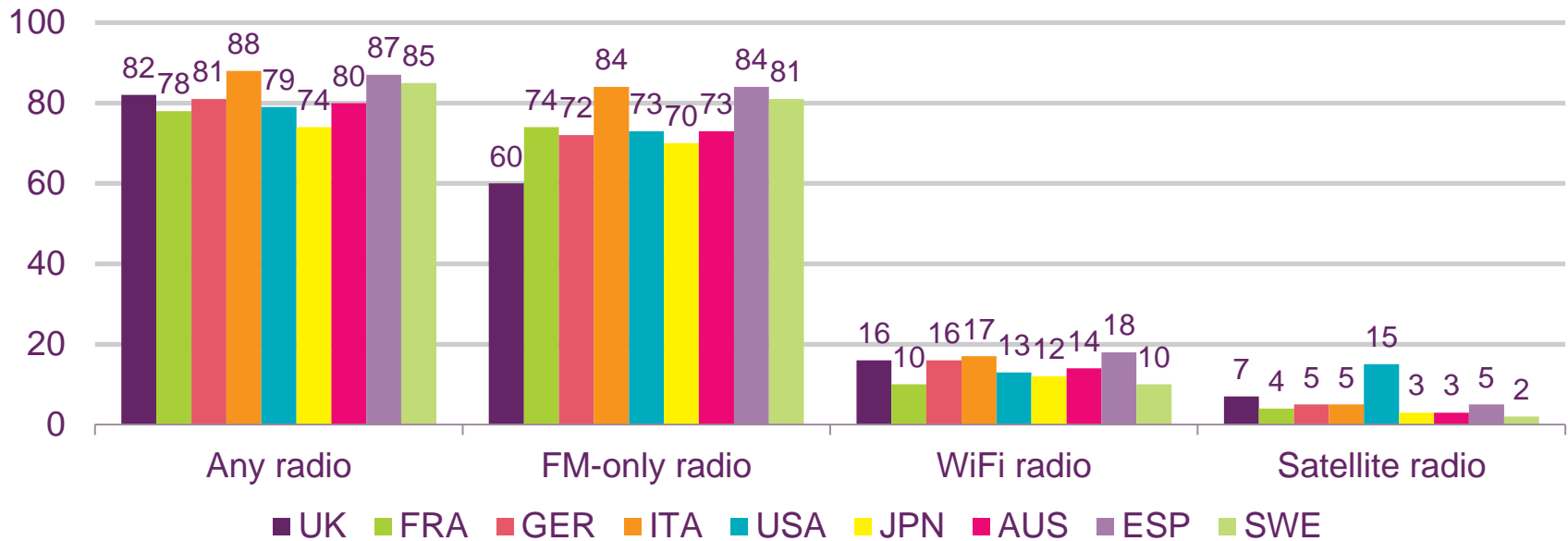
Source: WorldDAB

Note: (1) Regular DAB+ services were launched in France in June 2014. From 2012 to 2014 trial services were on air in Lyon and Nantes covering ~5% of the population in DAB+ and DMB. In 2014 regular services started in Paris, Marseille and Nice covering ~19% of the population with regular services (DAB+ and DMB), in addition to the trial services in Lyon and Nantes. Please note that Lyon and Nantes are not included in the 19% coverage calculation. From 2014 to 2015, DMB services moved to DAB+. Then, from summer 2015 all radio services are DAB+. (2) No data for DAB coverage exist for Japan due to digital television and radio services being broadcast over ISBD standards. (3) In the US satellite radio is the country's main digital radio platform, which has grown to become a major component of US radio revenue since its introduction in the mid-2000s.

Figure 4.17

Take-up of any radio set, and FM-only, WiFi and satellite radio sets, among regular radio listeners

Radio listeners (%)



Source: Ofcom consumer research September – October 2015

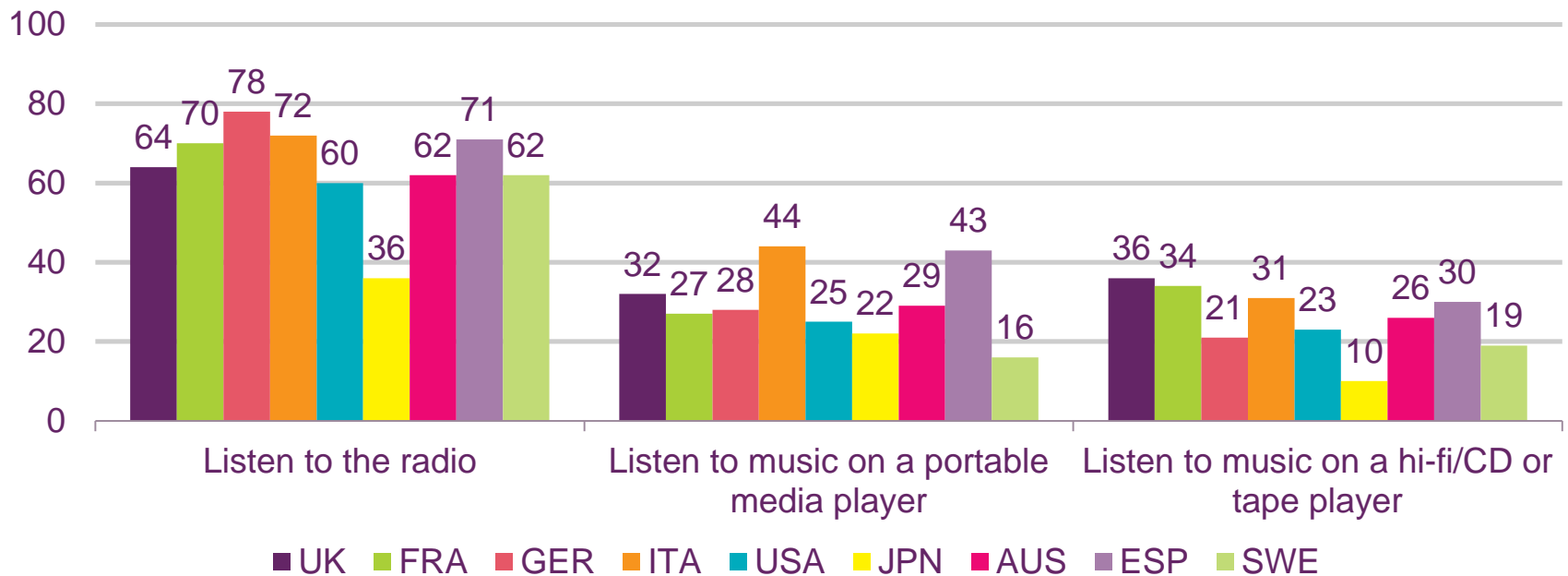
Base: Regular radio listeners, UK=648, FRA=709, GER=778, ITA=727, USA=610, JPN=358, AUS=622, ESP=707, SWE=616

Q.3a Which of the following devices do you have in your home?

Figure 4.18

Proportion of adults who claim to regularly consume audio content

Respondents (%)



Source: Ofcom consumer research September – October 2015

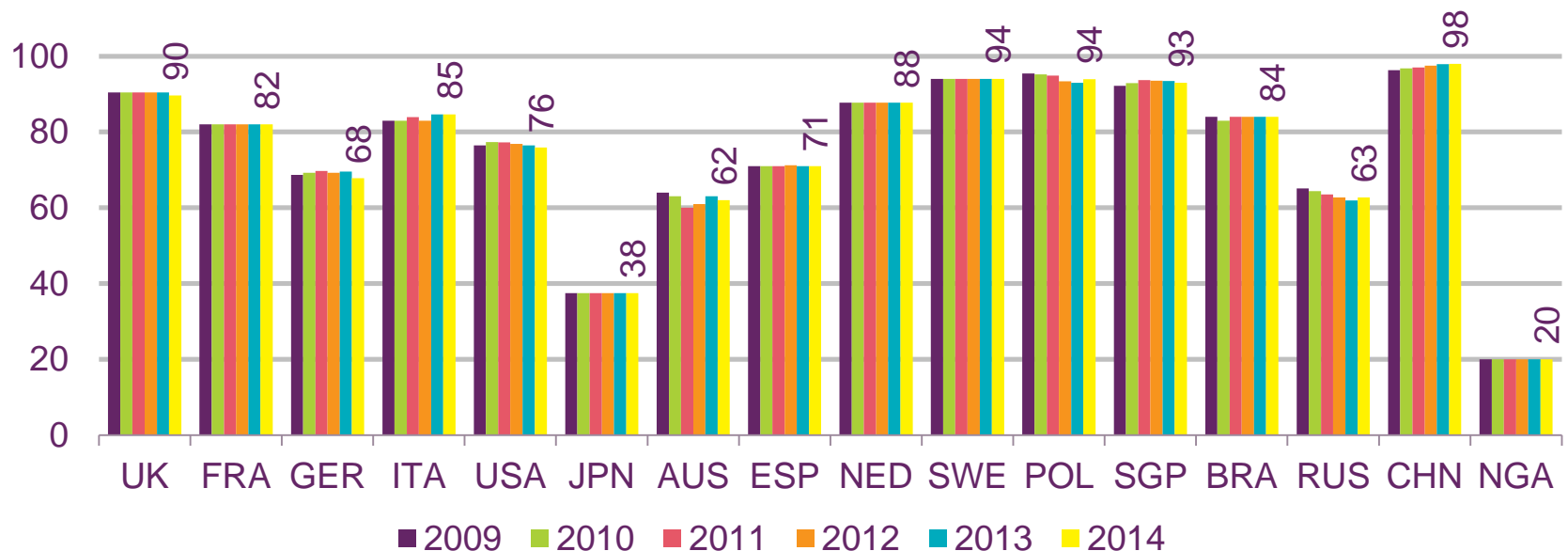
Base: All respondents, UK=1006, FRA=1003, GER=1007, ITA=1003, USA=1009, JPN=1006, AUS=1000, ESP=1002, SWE=1004

Q.6 Which of the following do you regularly do (at least once a week)?

Figure 4.19

Reach of radio: 2009-2014

Households (%)



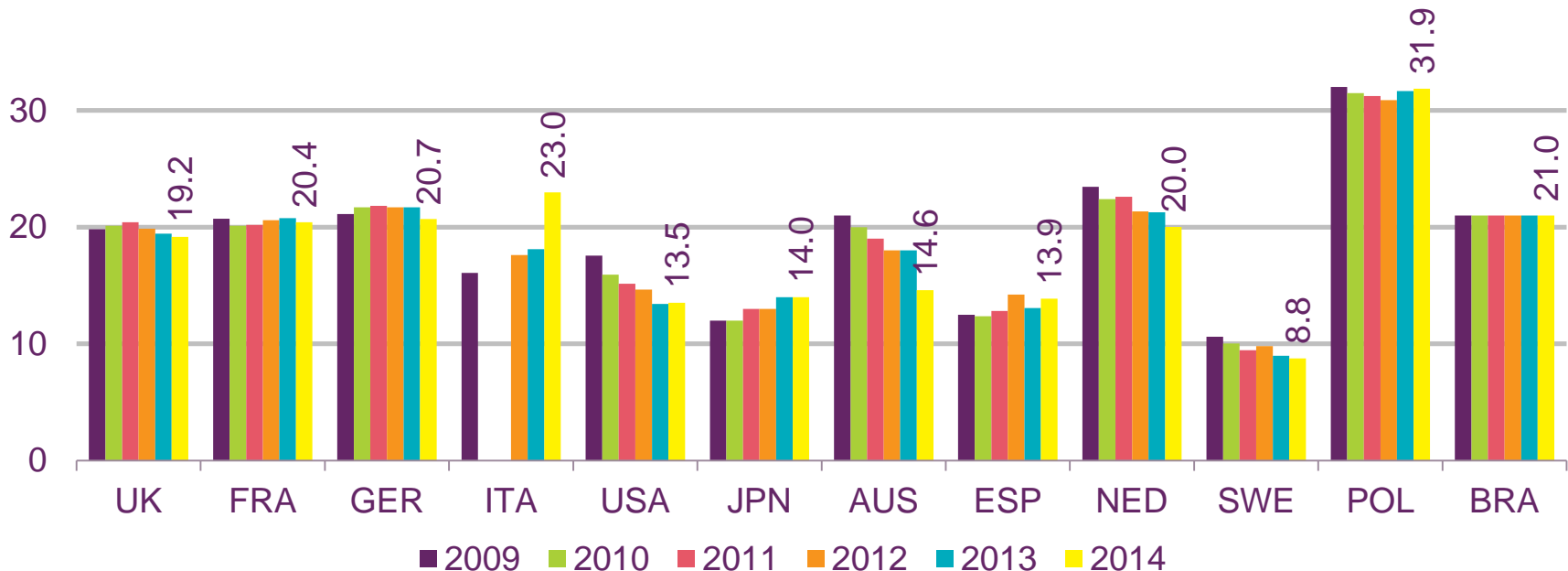
Source: IHS

Note: Different measurement systems in different countries are likely to use different methodologies, so comparative data should be treated as indicative only.

Figure 4.20

Average weekly listening hours, by country: 2009-2014

Average weekly listening hours



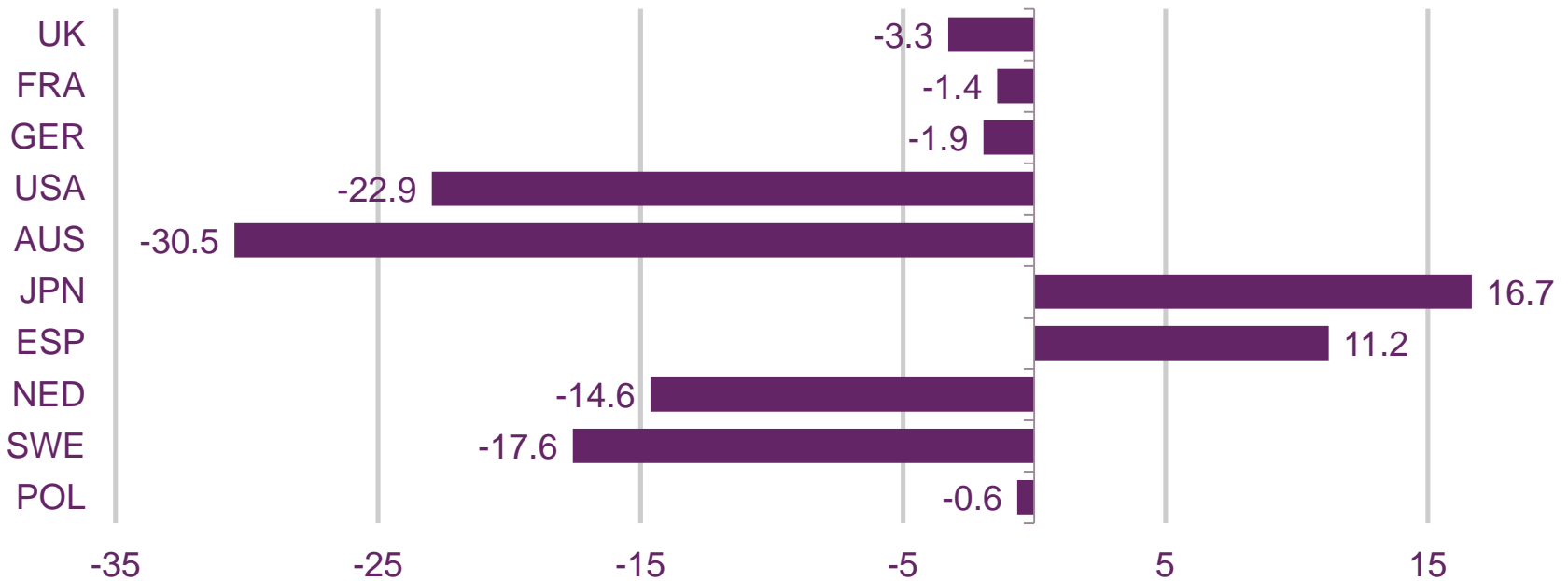
Source: IHS

Note: Different measurement systems in different countries are likely to use different methodologies, so comparative data should be treated as indicative only. Data unavailable for SGP, KOR, RUS, IND, CHN, NGA and for ITA 2010-2011.

Figure 4.21

Change in average weekly listening hours: 2009-2014

Change (%)

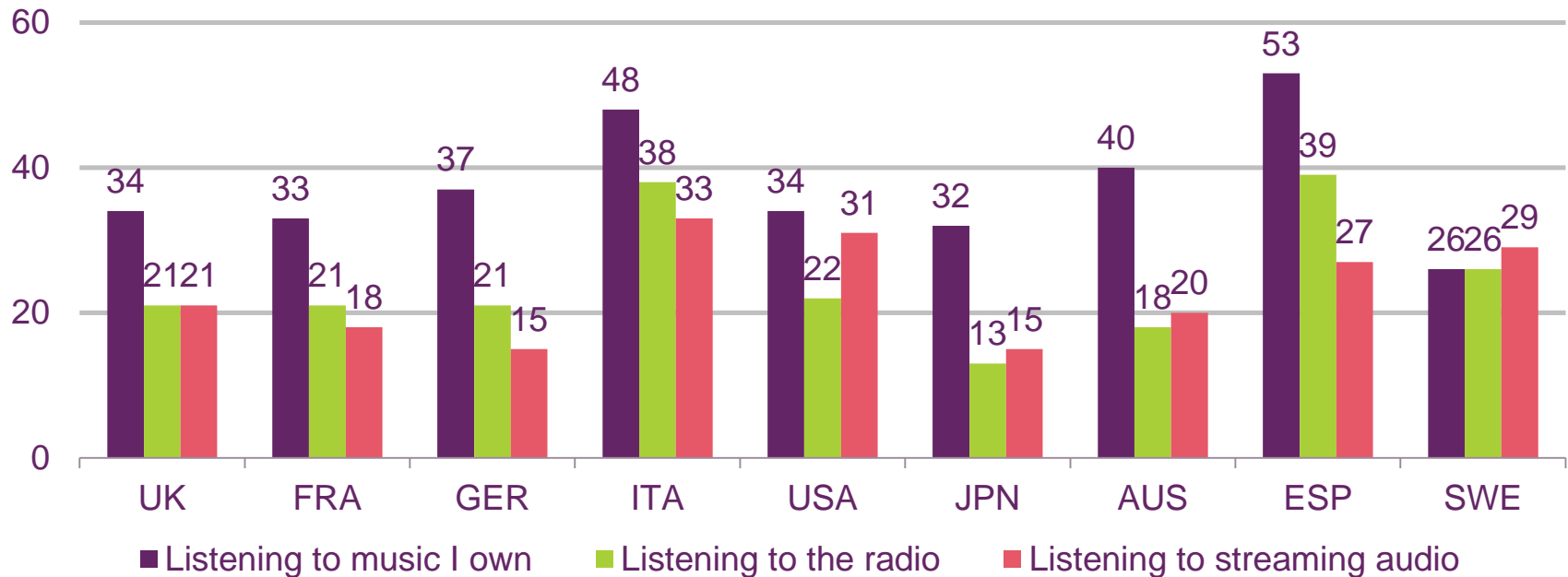


Source: IHS. Figures for Italy have been omitted as audience measurement systems over the five year period 2009 to 2014 have varied, after Audiradio, the former Italian radio audience measurement company stopped its activities in 2011. There was no change in average weekly listening hours between 2009-2014 in Brazil.

Figure 4.22

Use of a smartphone / mobile phone to consume audio content

Respondents with a mobile phone (%)



Source: Ofcom consumer research September – October 2015

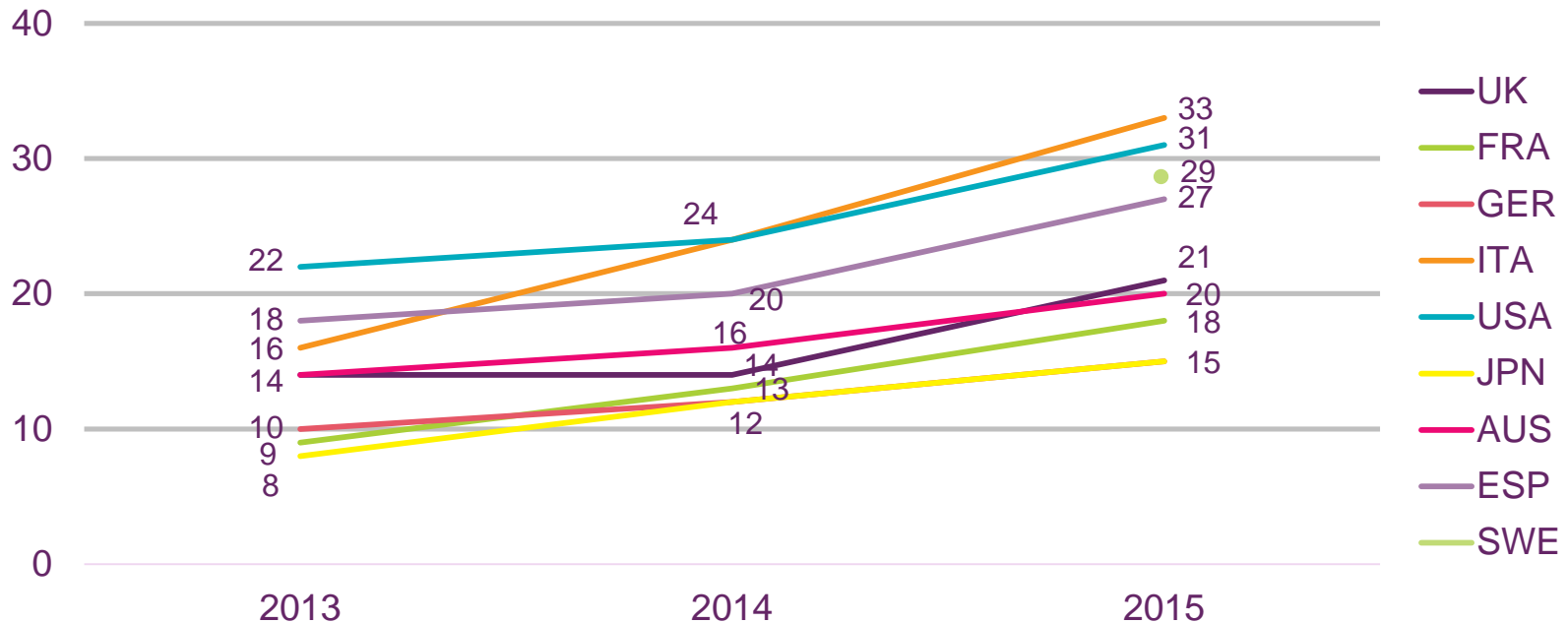
Base: All respondents with a mobile phone/ smartphone, UK=839, FRA=853, GER=882, ITA=865, USA=751, JPN=815, AUS=843, ESP=886, SWE=882

Q.9d Which, if any, of the following audio activities do you use each of your devices for?

Figure 4.23

Listening to streaming audio on mobile phones

Respondents with a mobile phone (%)



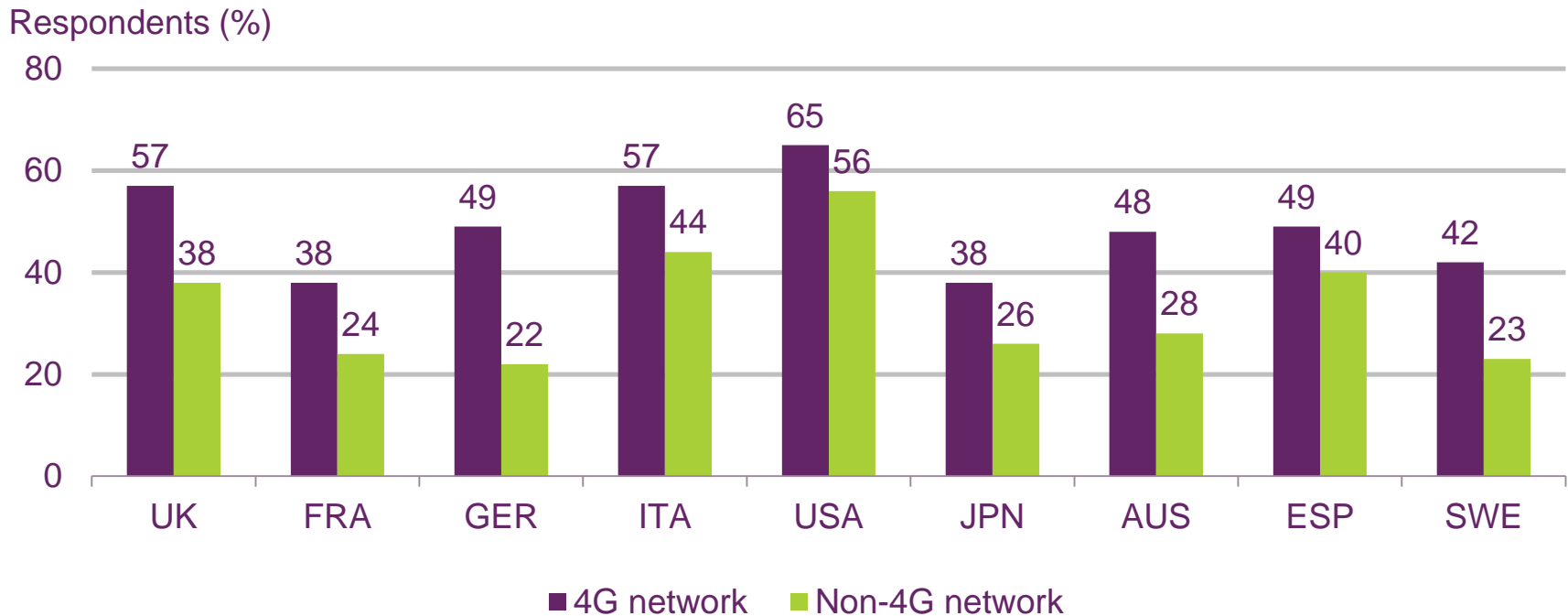
Source: Ofcom consumer research September – October 2015

Base: All respondents with a mobile phone/ smartphone, UK=839, FRA=853, GER=882, ITA=865, USA=751, JPN=815, AUS=843, ESP=886, SWE=882

Q.9d Which, if any, of the following audio activities do you use each of your devices for?

Figure 4.24

Proportion of respondents downloading/streaming music on a mobile phone at least weekly, among 4G and non-4G users



Source: Ofcom consumer research September - October 2015

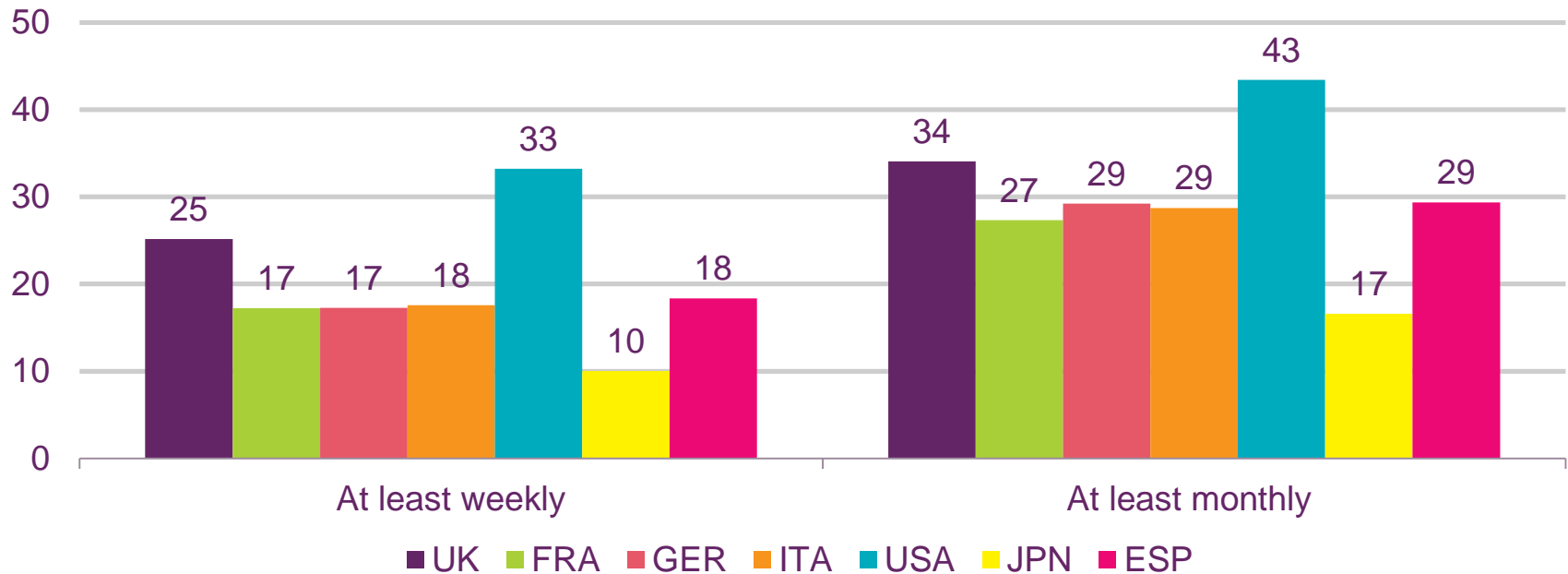
Base: All respondents who use 4G/ don't use 4G on their phone, UK=96*/105, FRA=125/143, GER=67*/146, ITA=108/242, USA=75*/49*, JPN=54*/52*, AUS=101/76*, ESP=114/212, SWE=107/96*. *Caution: bases under 100.

Q.22 Which of the following statements best describes your awareness and use of 4G? Q.27 How often, if at all, do you use your main mobile phone to do each of the following? <At least weekly>

Figure 4.25

Frequency of listening to music on a mobile phone

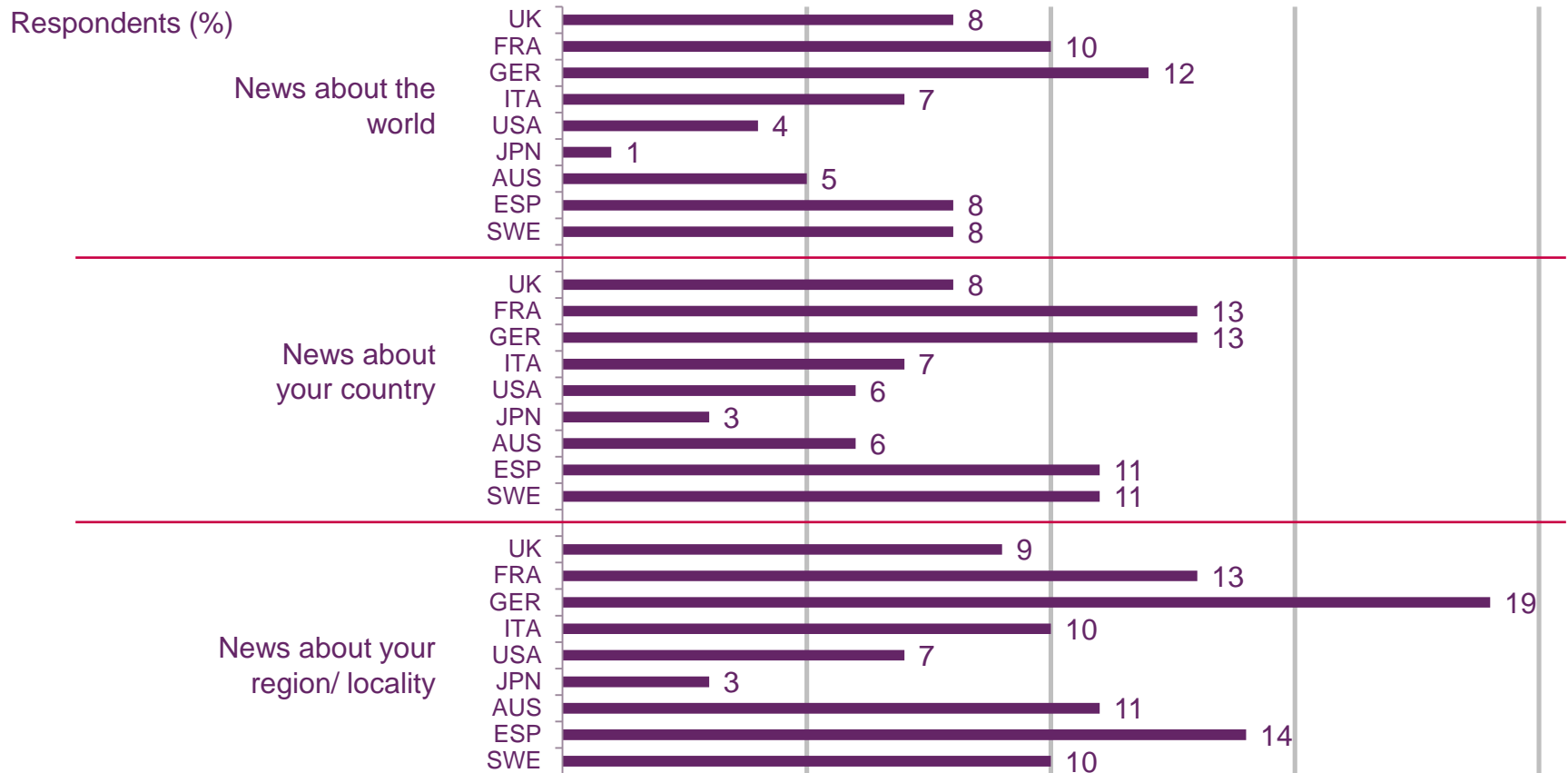
Mobile phone users (%)



Source: comScore MobiLens, August 2015 (three-month average, mobile phone users aged 13+).

Figure 4.26

Proportion who specify radio as their main source of news



Source: Ofcom consumer research September – October 2015

Base: All respondents, UK=1006, FRA=1003, GER=1007, ITA=1003, USA=1009, JPN=1006, AUS=1000, ESP=1002, SWE=1004
 Q.11 Which, if any, is your main source for the following information?