

Figure 4.1

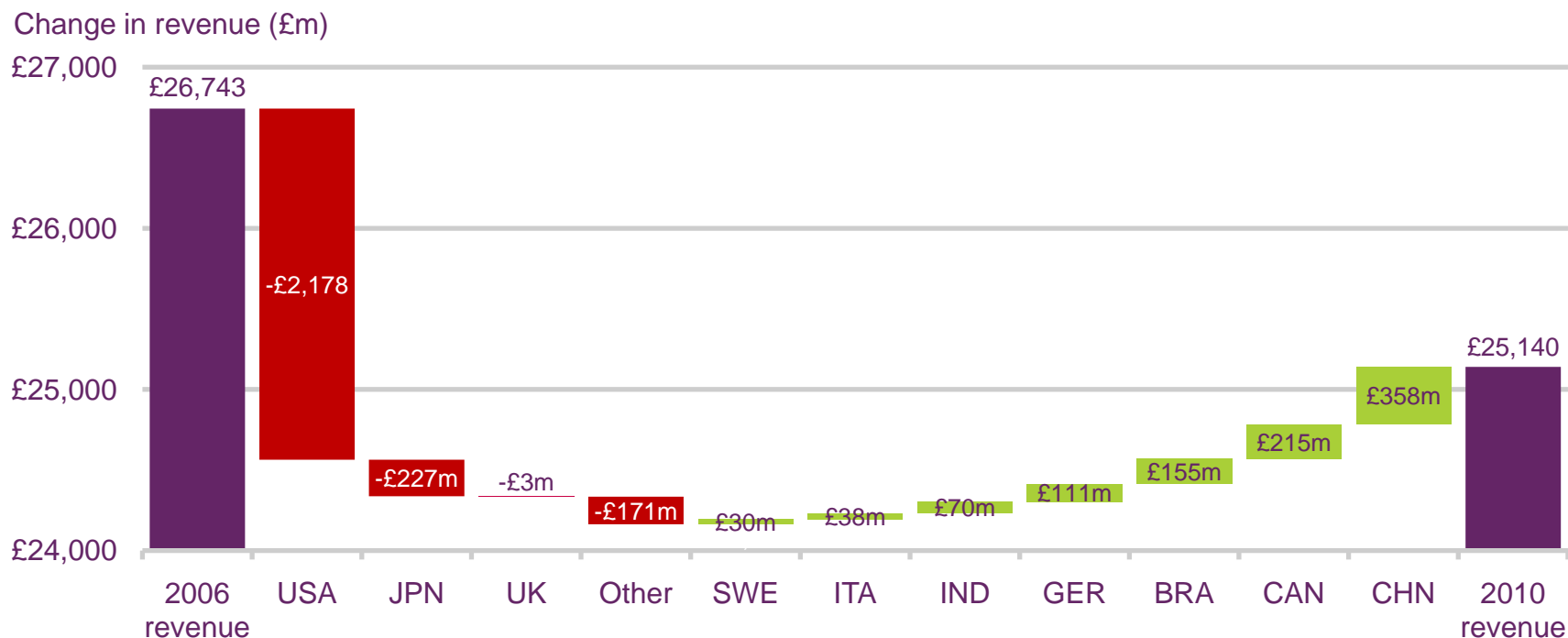
Key radio market indicators: 2010

	UK	FRA	GER	ITA	USA	CAN	JPN	AUS	ESP	NED	SWE	IRL	POL	BRA	RUS	IND	CHN
Total industry revenue (£bn)	1.1	1.3	2.9	0.4	11.9	1.1	2.7	0.6	0.5	0.4	0.3	0.2	0.1	0.4	0.2	0.1	0.9
Change in revenue (% YOY)	+2.8	-3	+0.1	+8	+8.3	+6	-1.1	+6.3	-2.2	+2.5	+2.3	-6.8	-4.1	+10.8	+11.8	+11.2	+10.8
Revenues per capita (£)	18	20	36	7	39	33	21	27	10	23	36	33	3	2	2	0.1	1
Income from public funding (%)	61	61	79	n/a	n/a	n/a	64	n/a	n/a	43	81	36	9	n/a	n/a	n/a	n/a
Weekly radio listening (% of pop)	67	75	72	74	71	n/a	n/a	69	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Public radio share (%)	62	61	79	n/a	n/a	n/a	n/a	n/a	n/a	43	81	36	9	n/a	n/a	n/a	n/a

Source: Ofcom, PricewaterhouseCoopers. All figures expressed in nominal terms

Figure 4.2:

Changes in radio revenues by country between 2006 and 2010



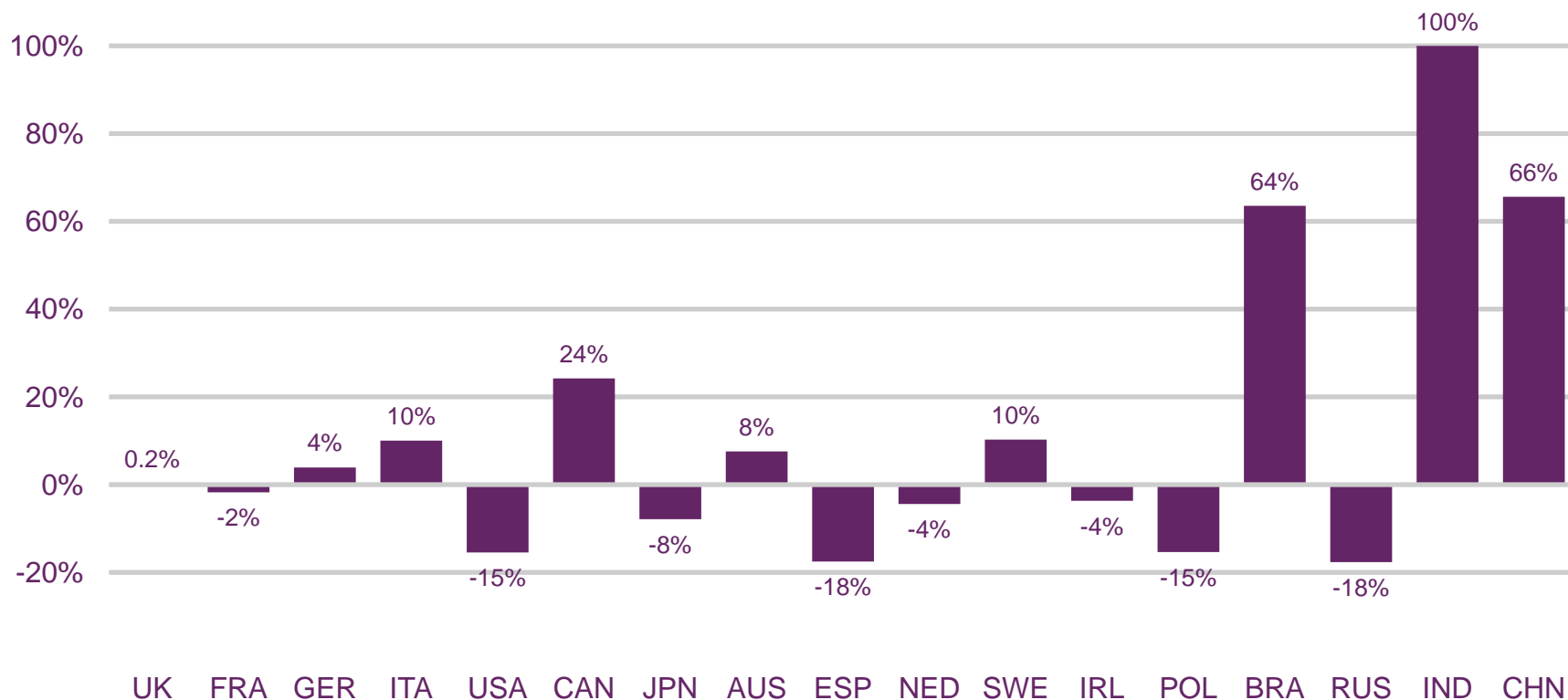
Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2011-2015 @ www.pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility.

Note: Ofcom has used an exchange rate of \$1.546 to the GBP, representing the IMF average for 2010. UK figures are taken from Ofcom's operator data

Figure 4.3:

Growth in radio revenue, by country: 2006 – 2010

Proportional change in revenue (%)

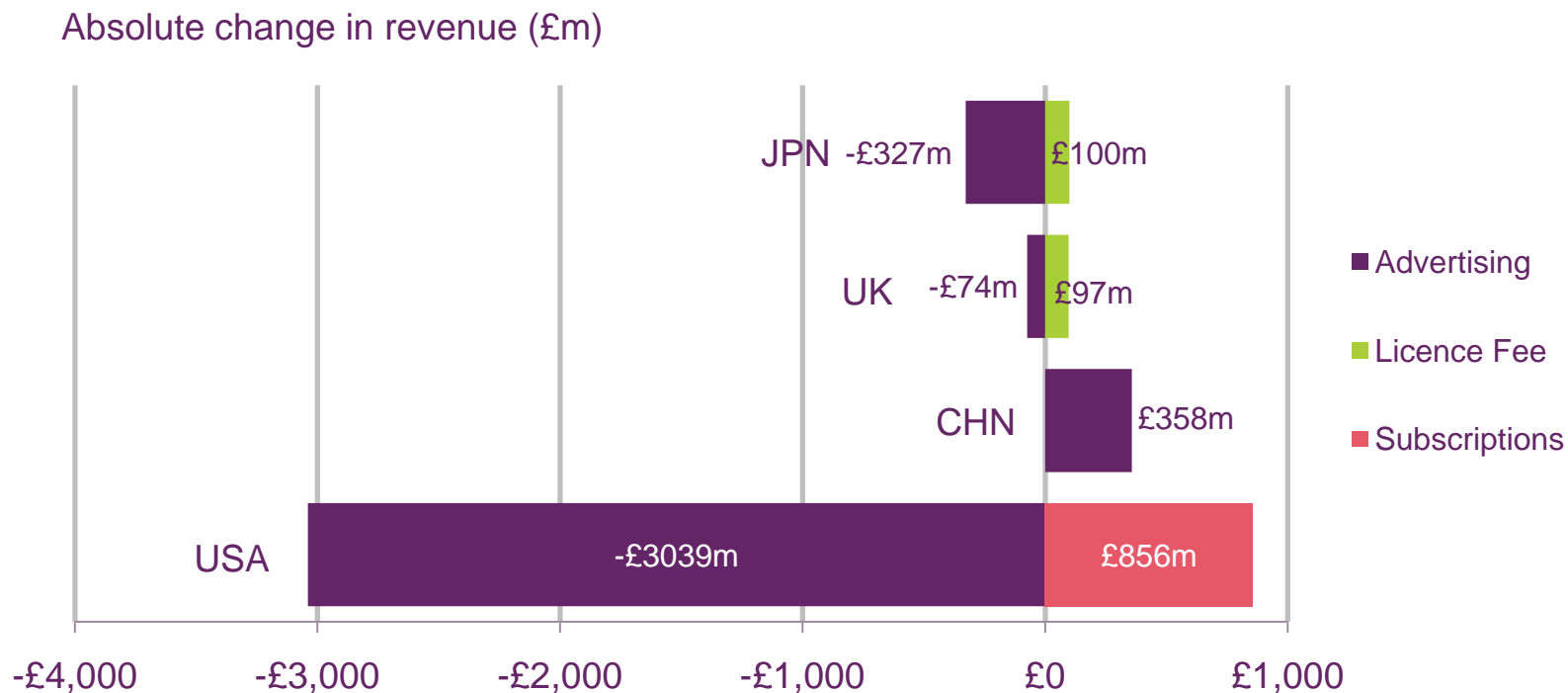


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Figure 4.4:

The most substantial changes in radio revenue, by component: 2006 – 2010

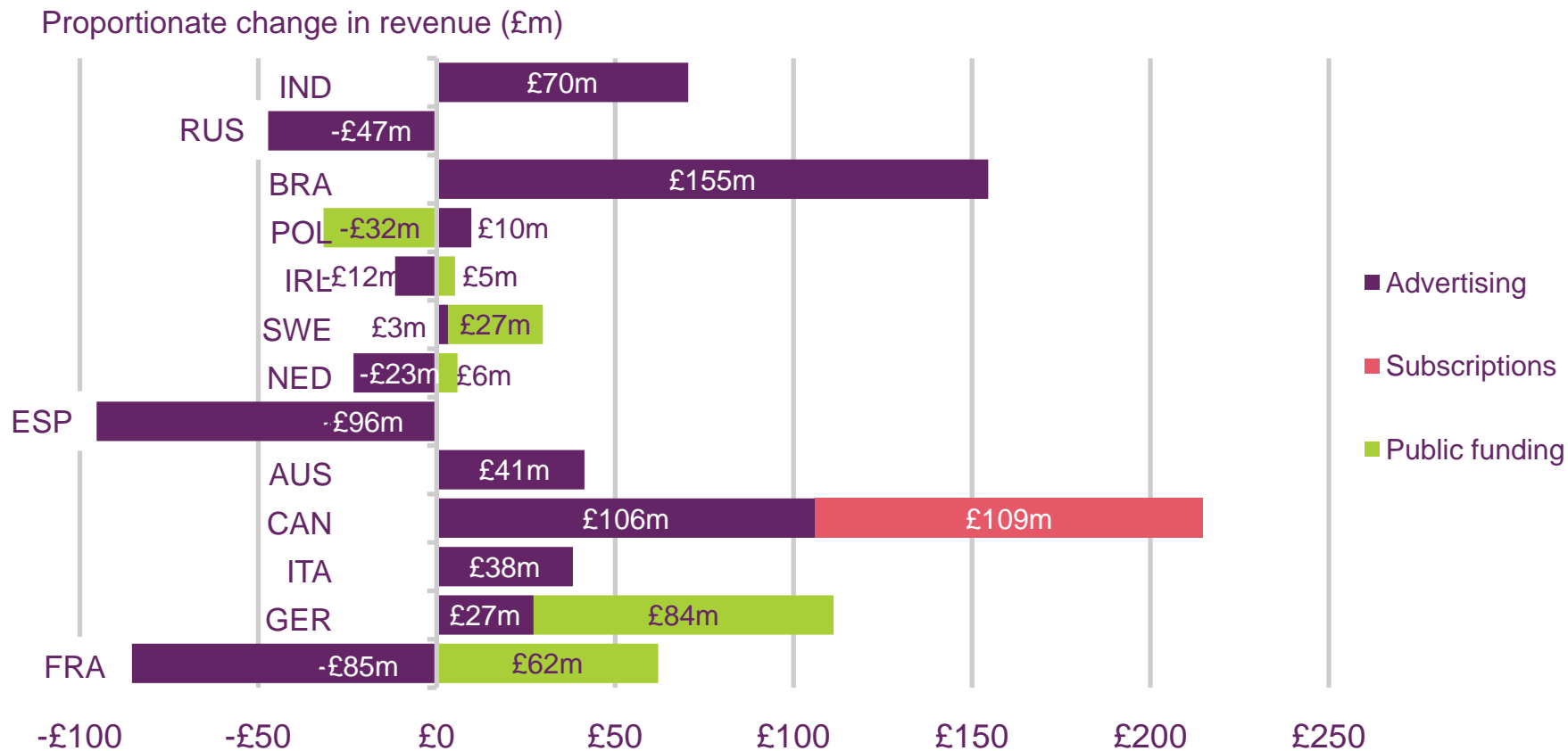


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Figure 4.5:

The smaller revenue swings, by component: 2006 – 2010

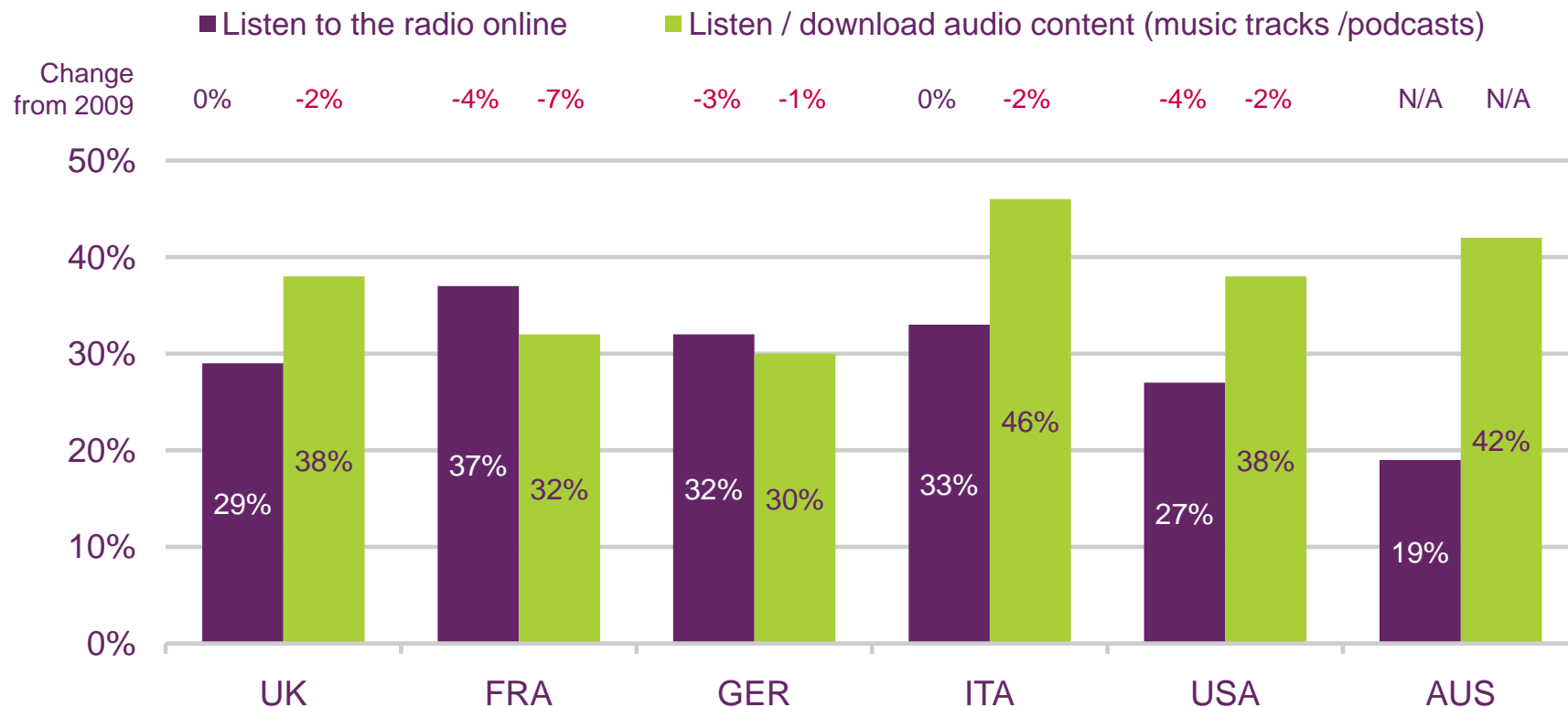


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Figure 4.6

Use of the internet to listen to the radio/ download audio content (music tracks/ podcasts)



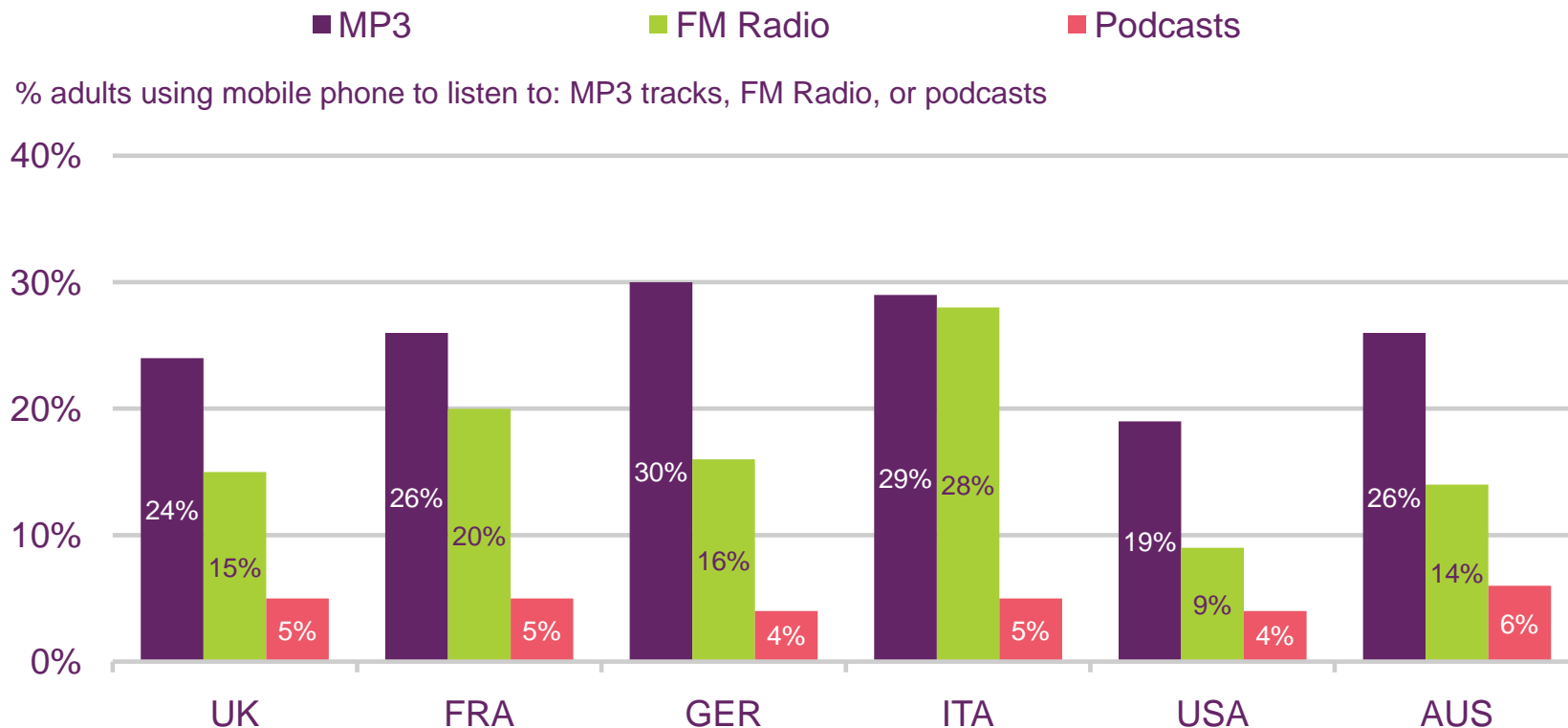
Source: Ofcom consumer research, October 2011

Base: Total sample size UK=1015, France=1014, Germany=1014, Italy=1045, US=1002, Australia=1012

Q: Which, if any, of the following activities do you use your home internet connection for? Listening to the radio / listening to or downloading audio content (e.g. music tracks or, podcasts).

Figure 4.7

Using a mobile phone to listen to MP3 tracks, FM radio or Podcasts



Source: Ofcom consumer research, October 2011 Base sizes (all adults who use the internet) UK=1015, France=1014, Germany=1014, Italy=1045, US=1002, Australia=1012

Q: 'Which of the following activities do you use your mobile for, listening to: FM radio, MP3 player, podcasts?'

Figure 4.8

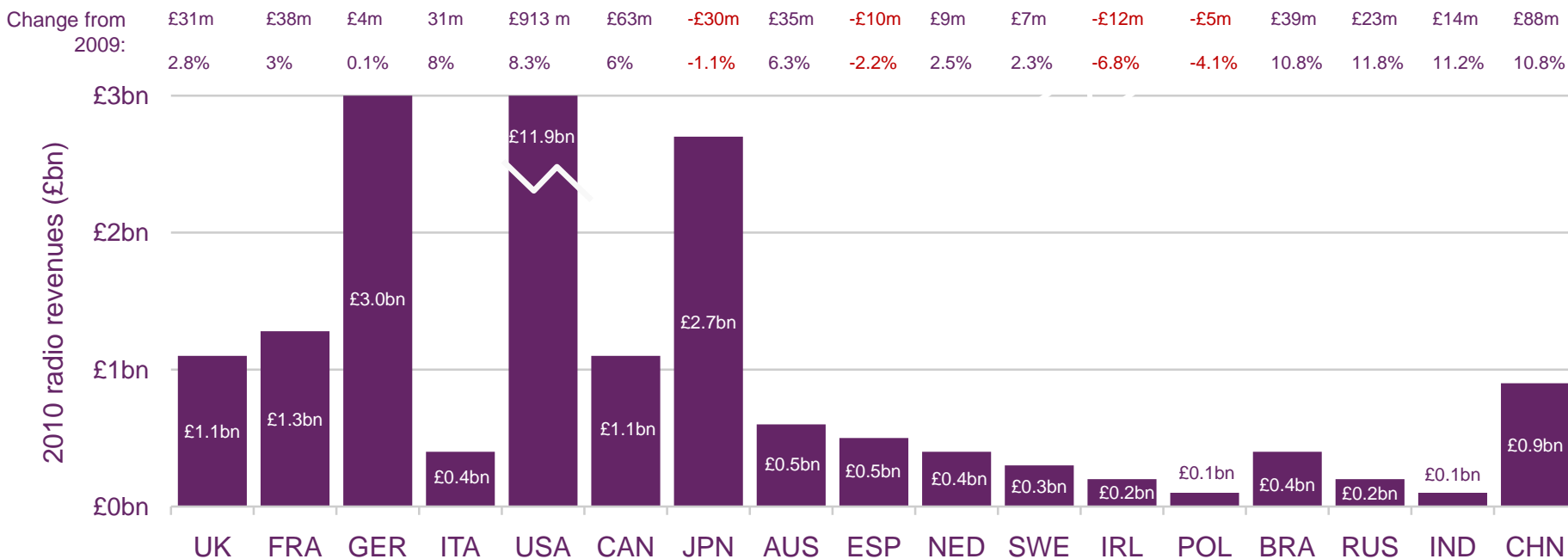
Global radio industry revenues: 2006 – 2010



Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2011-2015 @ www.pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility.
Note: Ofcom has used an exchange rate of \$1.546 to the GBP, representing the IMF average for 2010.

Figure 4.9

Radio industry revenue: 2010

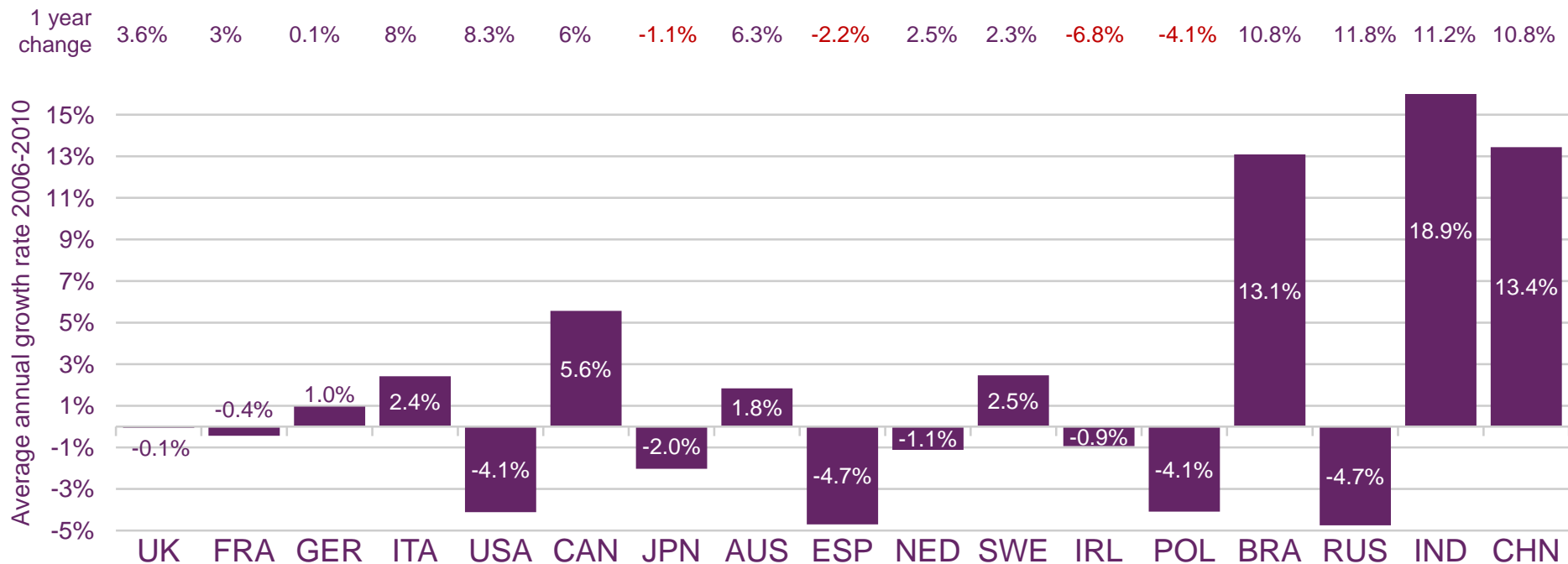


Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2011-2015 @ www.pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility.

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Figure 4.10

Radio industry revenue annual average growth: 2006 – 2010

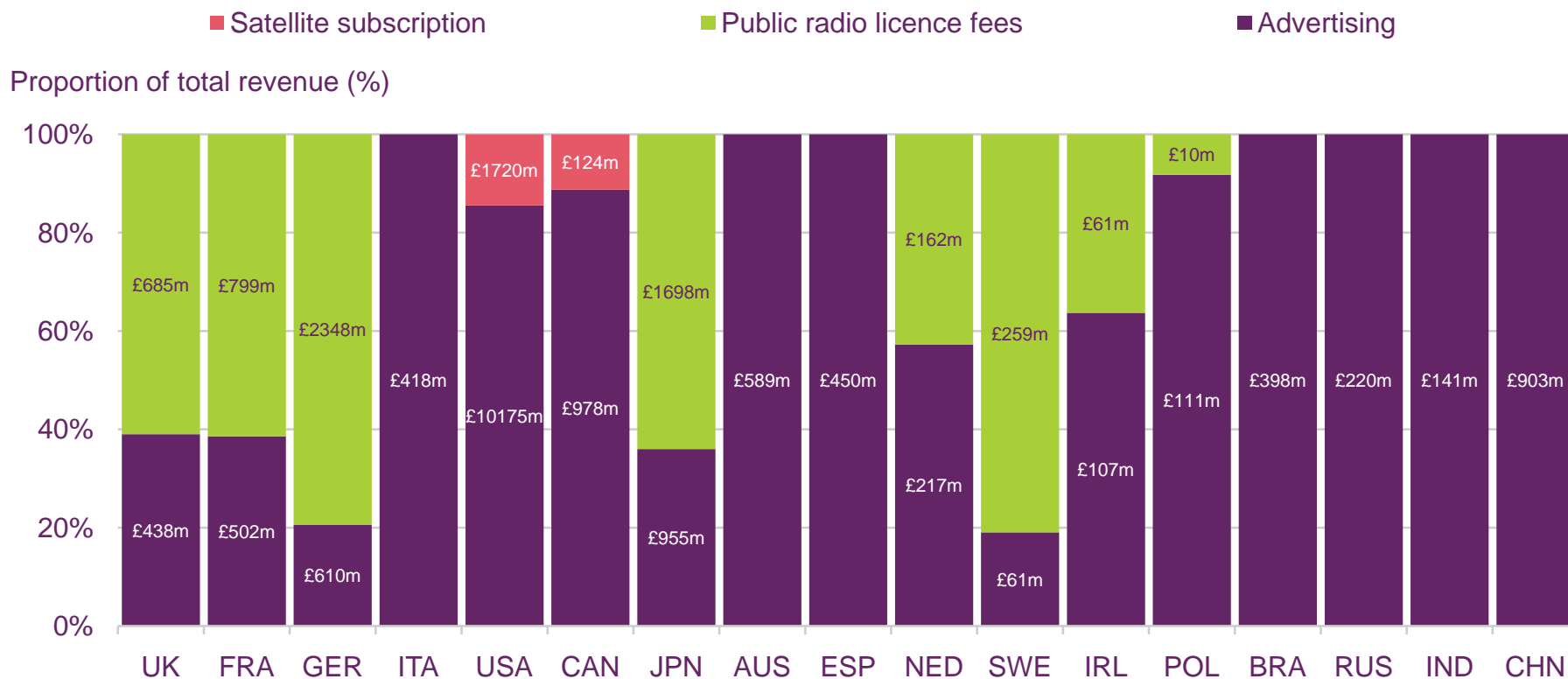


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Figure 4.11

Proportion of radio industry revenue by source: 2010

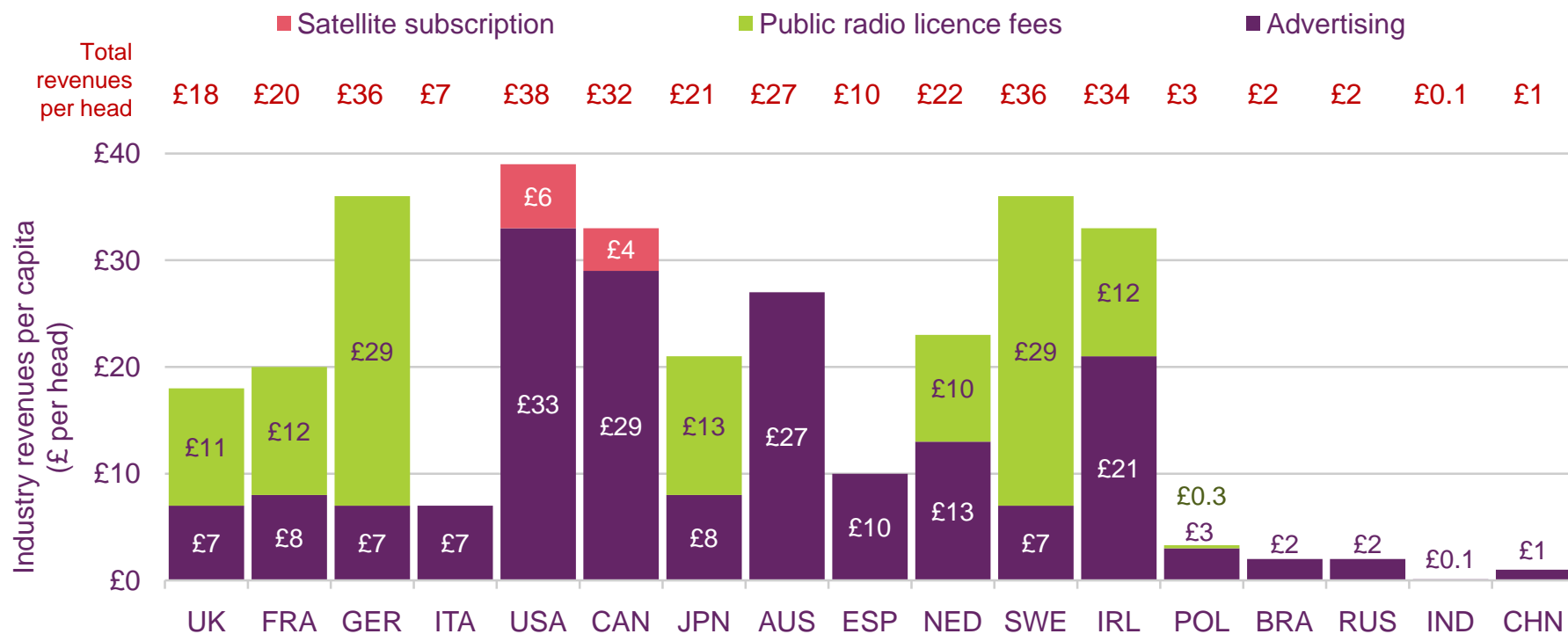


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Figure 4.12

Radio industry revenues per head, 2010

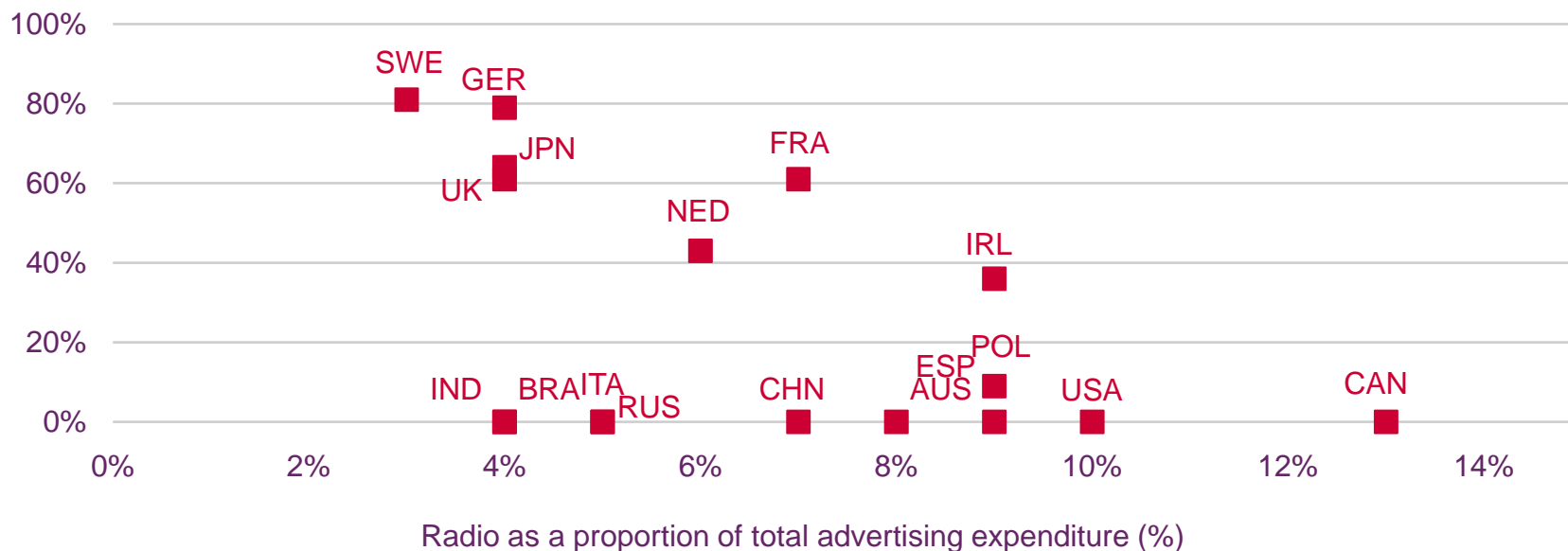


Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2011-2015. @ www.pwc.com/outlook. Manipulation and interpretation of data is solely Ofcom's responsibility. Figures in this chart are rounded. Population figures used in this calculation are taken from the US Census Bureau end of year estimates from mid-year values. Note: Ofcom has used an exchange rate of \$1.546 to the pound, representing the IMF average for 2010. UK figures are taken from Ofcom's operator data

Figure 4.13

Radio advertising as a proportion of total advertising spend: 2010, and licence fee as a share of all radio funding

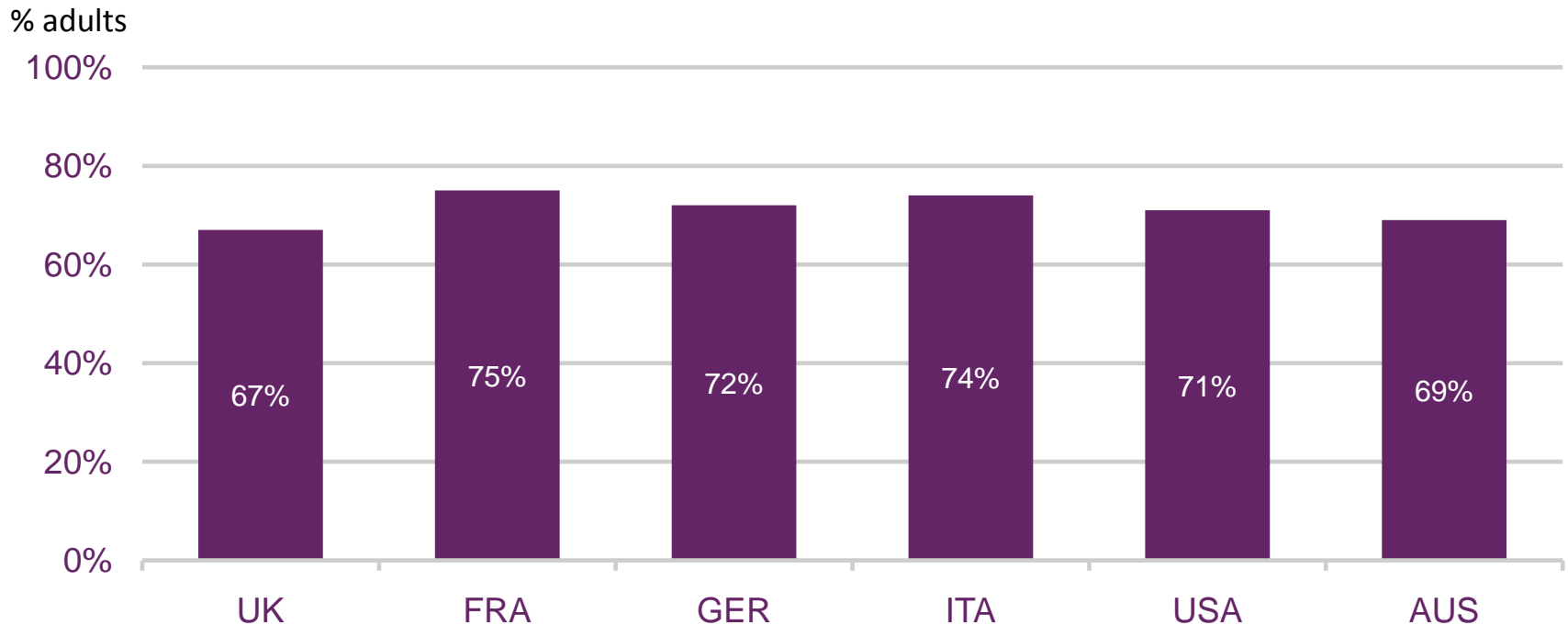
Public licence fee funding share of radio revenues (%)



Source: Radio as a proportion of total advertising spend sourced from Warc (www.warc.com). Public licence fee funding share of radio revenues is Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2011-2015. Ofcom has used an exchange rate of \$1.546 to the pound. Interpretation and manipulation of data is solely Ofcom's responsibility. Figures in this chart are rounded. Note that the UK radio industry figure is sourced from broadcaster returns made to Ofcom

Figure 4.14

Proportion of adults listening to the radio on at least a weekly basis, by country: 2011



Source: Ofcom consumer research, October 2011. Base sizes (all adults who use the internet) UK=1015, France=1014, Germany=1014, Italy=1045, US=1002, Australia=1012

Question: Which of the following do you regularly do (at least once a week): Listen to the radio.

For detailed information on the UK radio market, please refer to [The Communications Market Report 2011](#) where figures reported are from RAJAR

Figure 4.15

Proportion of adults regularly listening to the radio, by country: 2011

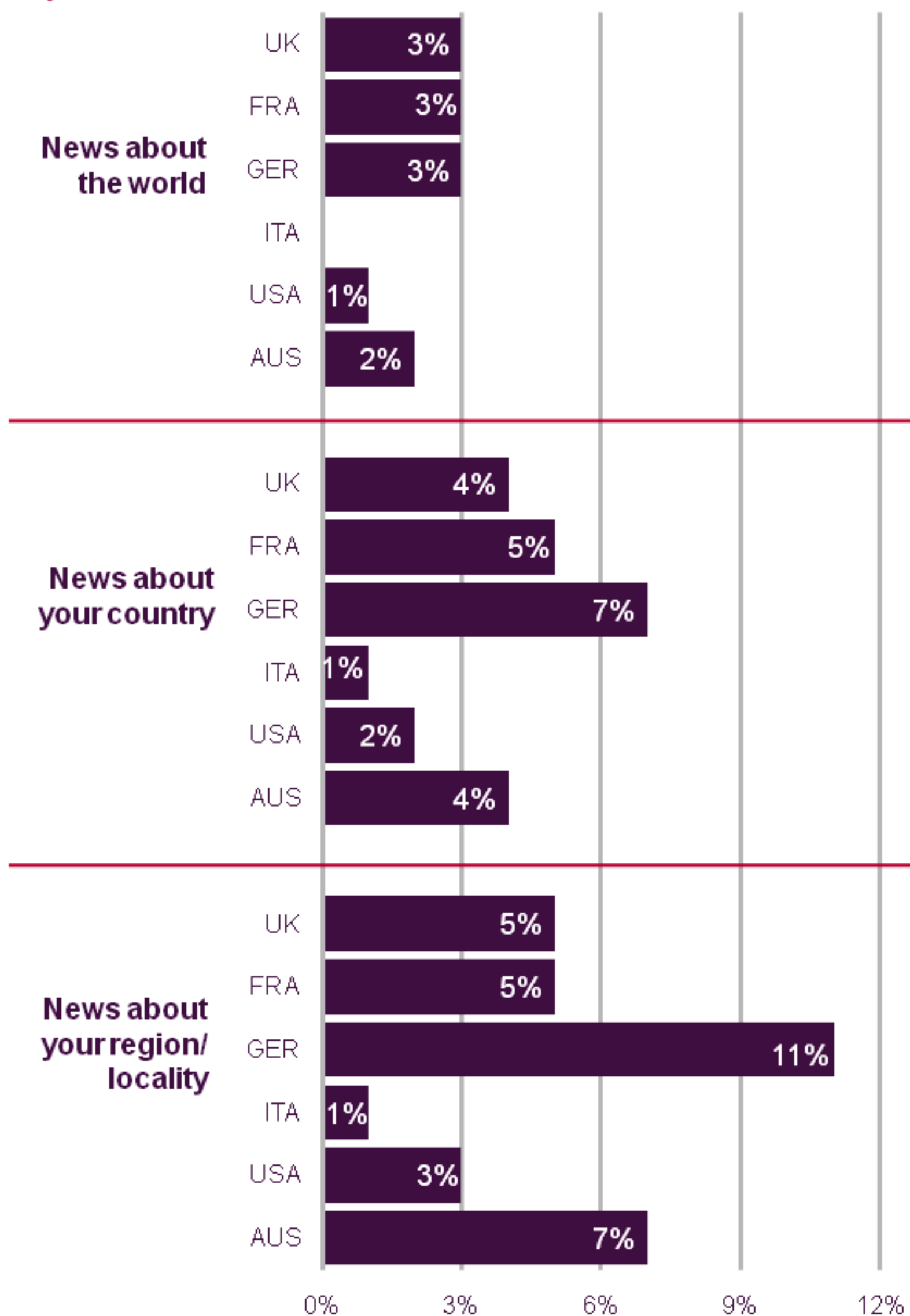


Figure 4.16

Recorded Music Sales - Top 20 Markets Summary

Rank	Country	Market Split (trade value)			Retail Value (£m)	% change
		Physical	Digital	Perf Rights		
1	USA	49%	49%	2%	£4,366.0	-10.0%
2	Japan	73%	25%	2%	£3,455.9	-8.3%
3	Germany	81%	12%	6%	£1,278.3	-4.1%
4	UK	67%	25%	8%	£1,228.0	-11.0%
5	France	74%	17%	9%	£810.0	-5.1%
6	Canada	66%	29%	5%	£335.0	-13.5%
7	Australia	68%	27%	5%	£370.2	-12.4%
8	Netherlands	70%	8%	22%	£194.7	-2.6%
9	Italy	75%	15%	10%	£212.9	-2.3%
10	Brazil	75%	17%	8%	£214.5	-1.2%
11	Spain	65%	20%	15%	£156.6	-21.0%
12	South Korea	45%	55%	-	£233.9	11.7%
13	Switzerland	79%	16%	5%	£132.5	-13.3%
14	India	41%	34%	25%	£153.8	16.5%
15	Belgium	79%	9%	12%	£134.0	-6.7%
16	Sweden	61%	28%	11%	£124.8	-7.1%
17	Mexico	76%	23%	1%	£136.8	0.9%
18	South Africa	93%	5%	2%	£118.8	-7.3%
19	Austria	76%	14%	10%	£136.9	-12.0%
20	Norway	65%	25%	10%	£113.1	-7.5%
	Global	66%	29%	5%	£15,116.3	-8.4%

Source: Ofcom calculations based on IFPI data, 'Recording Industry in Numbers' report.