## Figure 1

**Estimated DAB coverage**

<table>
<thead>
<tr>
<th>Existing DAB coverage</th>
<th>Aggregate of local multiplexes</th>
<th>BBC national¹</th>
<th>Commercial national (Digital One)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Households</td>
<td>73.1%</td>
<td>94.7%</td>
<td>89.5%</td>
</tr>
<tr>
<td>Roads</td>
<td>58.1%</td>
<td>84.2%</td>
<td>75.7%</td>
</tr>
</tbody>
</table>

Source: Ofcom, Arqiva, BBC, May 2014
Note: “National” means UK-wide. Road coverage refers to motorways and A-roads
1. The BBC is currently expanding its national coverage to reach 97% of households by March 2017
Figure 2

Existing FM coverage

<table>
<thead>
<tr>
<th>Existing FM coverage</th>
<th>Aggregate of local coverage</th>
<th>BBC national (BBC Radios 1 to 4)</th>
<th>Commercial national (Classic FM)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Households</td>
<td>92.6%</td>
<td>94.9%</td>
<td>90.9%</td>
</tr>
<tr>
<td>Households (variable)</td>
<td>97.9%</td>
<td>99.1%</td>
<td>97.4%</td>
</tr>
<tr>
<td>Roads</td>
<td>91.5%</td>
<td>93.1%</td>
<td>86.8%</td>
</tr>
<tr>
<td>Roads (variable)</td>
<td>95.5%</td>
<td>95.8%</td>
<td>90.3%</td>
</tr>
</tbody>
</table>

Source: Ofcom, August 2014
Figure 3

Number of UK radio stations broadcasting on analogue, August 2014

<table>
<thead>
<tr>
<th>Type of station</th>
<th>AM</th>
<th>FM</th>
<th>AM/FM total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local commercial</td>
<td>54</td>
<td>237</td>
<td>291</td>
</tr>
<tr>
<td>UK-wide commercial</td>
<td>2</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>BBC UK-wide networks</td>
<td>1</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>BBC local and nations</td>
<td>35</td>
<td>46</td>
<td>46</td>
</tr>
<tr>
<td>Community radio</td>
<td>7</td>
<td>208</td>
<td>215</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>99</strong></td>
<td><strong>496</strong></td>
<td><strong>560</strong></td>
</tr>
</tbody>
</table>

Source: Ofcom, August 2014. 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 2014

<table>
<thead>
<tr>
<th>Type of station</th>
<th>Relation to analogue area</th>
<th>Number of stations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local commercial</td>
<td>DAB in analogue area</td>
<td>131</td>
</tr>
<tr>
<td></td>
<td>DAB extends analogue area</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>DAB only</td>
<td>50</td>
</tr>
<tr>
<td>UK-wide commercial</td>
<td></td>
<td>14</td>
</tr>
<tr>
<td>BBC UK-wide networks</td>
<td></td>
<td>11</td>
</tr>
<tr>
<td>BBC local and nations</td>
<td></td>
<td>39</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td><strong>198</strong></td>
</tr>
</tbody>
</table>

Source: Ofcom, August 2014
Figure 5
Number of services available on UK DAB, UK map

Source: Ofcom, September 2014. Note: the Tyne and Wear and Teesside areas have one multiplex each, but each of these multiplexes carry more services than most other local multiplexes.

<table>
<thead>
<tr>
<th>No. services</th>
<th>BBC national</th>
<th>Commercial national</th>
<th>No. local multiplexes</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>11</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>25</td>
<td>✓</td>
<td>✓</td>
<td>-</td>
</tr>
<tr>
<td>26-35</td>
<td>✓</td>
<td>✓</td>
<td>1</td>
</tr>
<tr>
<td>36-44</td>
<td>✓</td>
<td>✓</td>
<td>2</td>
</tr>
<tr>
<td>45+</td>
<td>✓</td>
<td>✓</td>
<td>3</td>
</tr>
</tbody>
</table>

(see note)
Figure 6

Take-up of equipment capable of receiving digital radio: 2014

Source: Ofcom Technology Tracker, RAJAR Q2 2014
**Figure 7**

**Number of analogue and digital radio sets sold: year to Q2 2009-2014**

<table>
<thead>
<tr>
<th>Year to Q2</th>
<th>Analogue sets</th>
<th>DAB sets</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>6.5 million</td>
<td>2.1 million</td>
</tr>
<tr>
<td>2010</td>
<td>5.2 million</td>
<td>1.8 million</td>
</tr>
<tr>
<td>2011</td>
<td>4.8 million</td>
<td>1.9 million</td>
</tr>
<tr>
<td>2012</td>
<td>3.9 million</td>
<td>1.9 million</td>
</tr>
<tr>
<td>2013</td>
<td>3.4 million</td>
<td>1.9 million</td>
</tr>
<tr>
<td>2014</td>
<td>3.0 million</td>
<td>1.7 million</td>
</tr>
</tbody>
</table>

Digital share of sales:
- 2009: 24.1%
- 2010: 26.2%
- 2011: 27.8%
- 2012: 32.8%
- 2013: 35.6%
- 2014: 36.2%

Total annual sales:
- 2009: 8.5 million
- 2010: 7.0 million
- 2011: 6.7 million
- 2012: 5.8 million
- 2013: 5.3 million
- 2014: 4.7 million

Source: GfK sales data, 2009-2014.
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

Proportion of drivers and passengers who use a vehicle with a digital radio

QP12/13. Is the radio in this vehicle a digital radio?/ How many of the radios in those vehicles are digital radios?

Source: Ofcom research, Q2 2012 (n=1756), Q2 2013 (n=1709), Q2 2014 (n=1769)
Base: Those who use at least one motor vehicle with a radio in most weeks (as a driver or passenger)
Figure 9

Status of digital radio availability in newly registered cars

Proportion of newly registered cars (%)

Source: CAP/SMMT
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?
Source: Ofcom research
Base: All respondents Q1 2011 (3772), Q2 2012 (2893), Q2 2013 (2879), Q2 2014 (2877)
Q4. In which of these rooms at home do you have any radios?
Source: Ofcom Technology Tracker, Wave 2 2014
Base: All respondents, n=2877
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 2014

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 2013 - Q2 2014

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 digital platforms, by quarter: Q2 2012 to Q2 2014

% share of listening hours

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>DAB</td>
<td>20.1</td>
<td>20.4</td>
<td>21.1</td>
<td>22.5</td>
<td>23.9</td>
<td>23.0</td>
<td>23.4</td>
<td>23.7</td>
<td>24.1</td>
</tr>
<tr>
<td>DTV</td>
<td>4.7</td>
<td>4.8</td>
<td>5.1</td>
<td>5.0</td>
<td>5.2</td>
<td>5.2</td>
<td>5.0</td>
<td>4.8</td>
<td>4.2</td>
</tr>
<tr>
<td>Internet</td>
<td>1.9</td>
<td>1.9</td>
<td>1.9</td>
<td>1.8</td>
<td>1.5</td>
<td>1.7</td>
<td>1.7</td>
<td>1.6</td>
<td>1.7</td>
</tr>
<tr>
<td>Digital Not stated</td>
<td>4.6</td>
<td>4.2</td>
<td>4.9</td>
<td>5.0</td>
<td>6.0</td>
<td>5.7</td>
<td>5.8</td>
<td>6.4</td>
<td>6.2</td>
</tr>
</tbody>
</table>

Total digital share of listening hours:

- Q2 2012: 31.5%
- Q3 2012: 31.3%
- Q4 2012: 33.0%
- Q1 2013: 34.3%
- Q2 2013: 36.8%
- Q3 2013: 35.6%
- Q4 2013: 36.1%
- Q1 2014: 36.6%
- Q2 2014: 36.8%

Source: RAJAR. All adults (15+)

Note: ‘Digital unspecified’ relates to listening to digital-only stations where the survey respondent has not specified the listening platform used. From Q1 2012 ‘Internet’ has been reclassified as ‘Online/Apps’
Figure 16

Distribution of listening hours across analogue and digital platforms, the 12 months to Q2: 2011 - 2014

Share of total listening

<table>
<thead>
<tr>
<th>Year</th>
<th>Digital</th>
<th>Unspecified</th>
<th>Analogue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q2 2011</td>
<td>25.9%</td>
<td>7.9%</td>
<td>66.2%</td>
</tr>
<tr>
<td>Q2 2012</td>
<td>29.5%</td>
<td>7.2%</td>
<td>63.2%</td>
</tr>
<tr>
<td>Q2 2013</td>
<td>33.9%</td>
<td>5.2%</td>
<td>60.9%</td>
</tr>
<tr>
<td>Q2 2014</td>
<td>36.3%</td>
<td>5.6%</td>
<td>58.0%</td>
</tr>
</tbody>
</table>

Source: RAJAR. All adults (15+)

Note: ‘Unspecified’ relates to listening where the radio platform was not confirmed by the listener.
Figure 17

Share of listening, by digital platform and area

DAB  DTV  Online/apps  All digital

Share of listening

Source: RAJAR, Q2 2014
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 18
Digital radio’s share of total radio listening hours, by platform

Source: RAJAR. All adults (15+), 12 months to Q2 2014
Note: ‘Digital unspecified’ relates to listening to digital-only stations, where the survey respondent has not specified the platform used.
Figure 19

Proportion of individuals who claim to listen to radio on a mobile phone or tablet at least once per month

Proportion of individuals (%)

Source: RAJAR / Ipsos MORI / RSMB
Note: As of Q1 2014 the figures include listening via a tablet
Figure 20
Distribution of listening hours, by service provider, analogue and digital platforms: year to Q2 2014

Source: RAJAR. All adults (15+), 12 months to Q2 2014
Figure 21
Distribution of listening hours, by service, analogue and digital platforms: year to Q2 2014

Share of total listening hours

<table>
<thead>
<tr>
<th>Service</th>
<th>0%</th>
<th>5%</th>
<th>10%</th>
<th>15%</th>
<th>20%</th>
<th>Year-on-year change in digital listening (pp)</th>
</tr>
</thead>
<tbody>
<tr>
<td>BBC Radio 2</td>
<td></td>
<td>11.0%</td>
<td></td>
<td>5.8%</td>
<td></td>
<td>+1.1</td>
</tr>
<tr>
<td>BBC Radio 4</td>
<td></td>
<td>7.2%</td>
<td></td>
<td>4.5%</td>
<td></td>
<td>+0.1</td>
</tr>
<tr>
<td>BBC Radio 1</td>
<td></td>
<td>4.5%</td>
<td>1.8%</td>
<td></td>
<td></td>
<td>+0.0</td>
</tr>
<tr>
<td>BBC Radio 5 live</td>
<td>2.0%</td>
<td>1.9%</td>
<td></td>
<td></td>
<td></td>
<td>+0.1</td>
</tr>
<tr>
<td>Classic FM</td>
<td>2.0%</td>
<td>1.2%</td>
<td></td>
<td></td>
<td></td>
<td>+0.0</td>
</tr>
<tr>
<td>talkSPORT</td>
<td>1.1%</td>
<td>0.8%</td>
<td></td>
<td></td>
<td></td>
<td>+0.2</td>
</tr>
</tbody>
</table>

Source: RAJAR. All adults (15+), year ending Q2 2014
Note: ‘Unspecified’ relates to listening where the radio platform was not confirmed by the listener.
Figure 22

Digital-only stations, by average weekly reach

Average weekly reach (thousands)

Source: RAJAR. All adults (15+), 12 months to Q2 2014
Figure 23

Weekly listening to radio through a digital platform, by age group

Weekly digital radio listening by age group (% of total)

Source: RAJAR, Q2 2014
Base: Adults 15+ who listen to the radio
Figure 24

Weekly listening to radio through a digital platform, by socio-economic group

Weekly digital radio listening by social-economic group (% of total)

Source: RAJAR, Q2 2014
Base: Adults 15+ who listen to the radio
Figure 25

Awareness of devices capable of receiving radio services

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

Source: Ofcom research, Quarter 2 2014, *Take-up measures from Quarter 1 2014
Base: All respondents, n=2877
Figure 26
Awareness of digital radios sometimes called ‘DAB radios’

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

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1 2011</td>
<td>83</td>
<td>14</td>
<td>3</td>
</tr>
<tr>
<td>Q2 2012</td>
<td>81</td>
<td>17</td>
<td>2</td>
</tr>
<tr>
<td>Q2 2013</td>
<td>87</td>
<td>10</td>
<td>2</td>
</tr>
<tr>
<td>Q2 2014</td>
<td>86</td>
<td>12</td>
<td>2</td>
</tr>
</tbody>
</table>

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 one 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 27

Associations of digital radio among those with and without DAB

QP14. Which if any of these features did you associate with digital radio?
Source: Ofcom research, Quarter 2 2014, n=2592; n=1240; n=872; n=1694
Base: All aware of digital radio, with experience of listening or aware of way of listening; all with any type of digital radio
QP15. As a digital radio listener which, if any, of these features of digital radio have you experienced?
Source: Ofcom research, Quarter 2 2014, n=1125
Base: All with any type of DAB digital radio (in home or vehicle)
Figure 29

Likelihood of purchasing a DAB set

Percentage of respondents who listen to the radio but have no DAB set in the home:

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

Source: Ofcom research, Q2 2014
Base: Those who listen to the radio but have no DAB sets in the home (n=880)
QP12: How likely is it that your household will get a DAB radio in the next 12 months?
Figure 30

Reasons radio listeners gave for not acquiring a DAB radio set

- No need: 60%
- Happy to use existing service: 38%
- Happy to use analogue radio: 6%
- Can receive via DTV: 4%
- Would never listen: 4%
- Can't afford it: 4%
- Too expensive: 4%
- Poor reception in area: 4%
- Don't know why I should: 2%

Source: Ofcom research, Q2 2014
Base: Those 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?