Digital Radio Report 2014

25th September 2014

Figure 1

Estimated DAB coverage

Existing DAB coverage	Aggregate of local multiplexes	BBC national[1]	Commercial national (Digital One)
Households	73.1%	94.7%	89.5%
Roads	58.1%	84.2%	75.7%

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

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, August 2014

Figure 3

Number of UK radio stations broadcasting on analogue, August 2014

Type of station	AM	FM	AM/FM total
Local commercial	54	237	291
UK-wide commercial	2	1	3
BBC UK-wide networks	1	4	5
BBC local and nations	35	46	46
Community radio	7	208	215
TOTAL	**99**	**496**	**560**

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

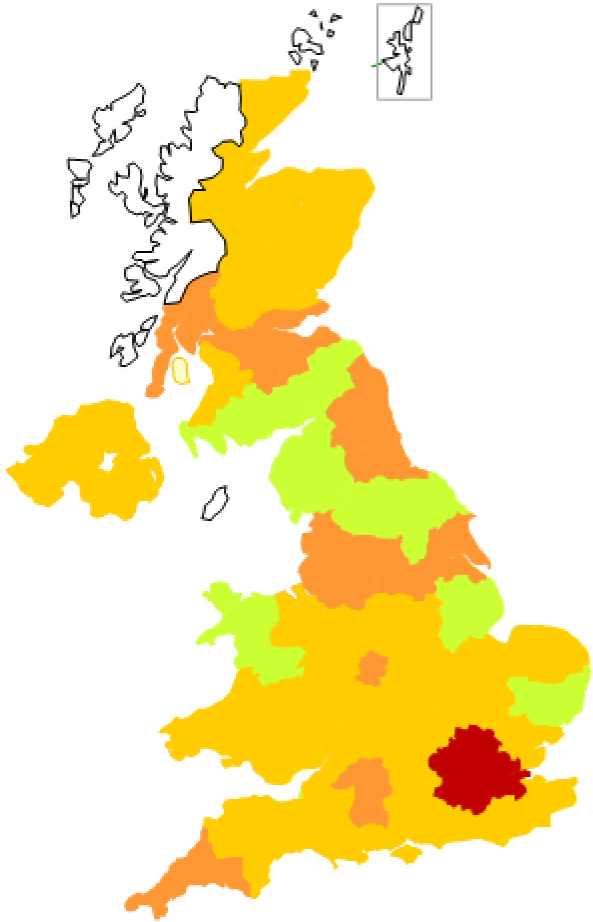
Number of UK radio stations broadcasting on DAB: August 2014

Type of station	Relation to analogue area	Number of stations
Local commercial	DAB in analogue area	131
	DAB extends analogue area	3
	DAB only	50
UK-wide commercial		14
BBC UK-wide networks		11
BBC local and nations		39
TOTAL		**198**

Source: Ofcom, August 2014

Figure 5

Number of services available on UK DAB, UK map

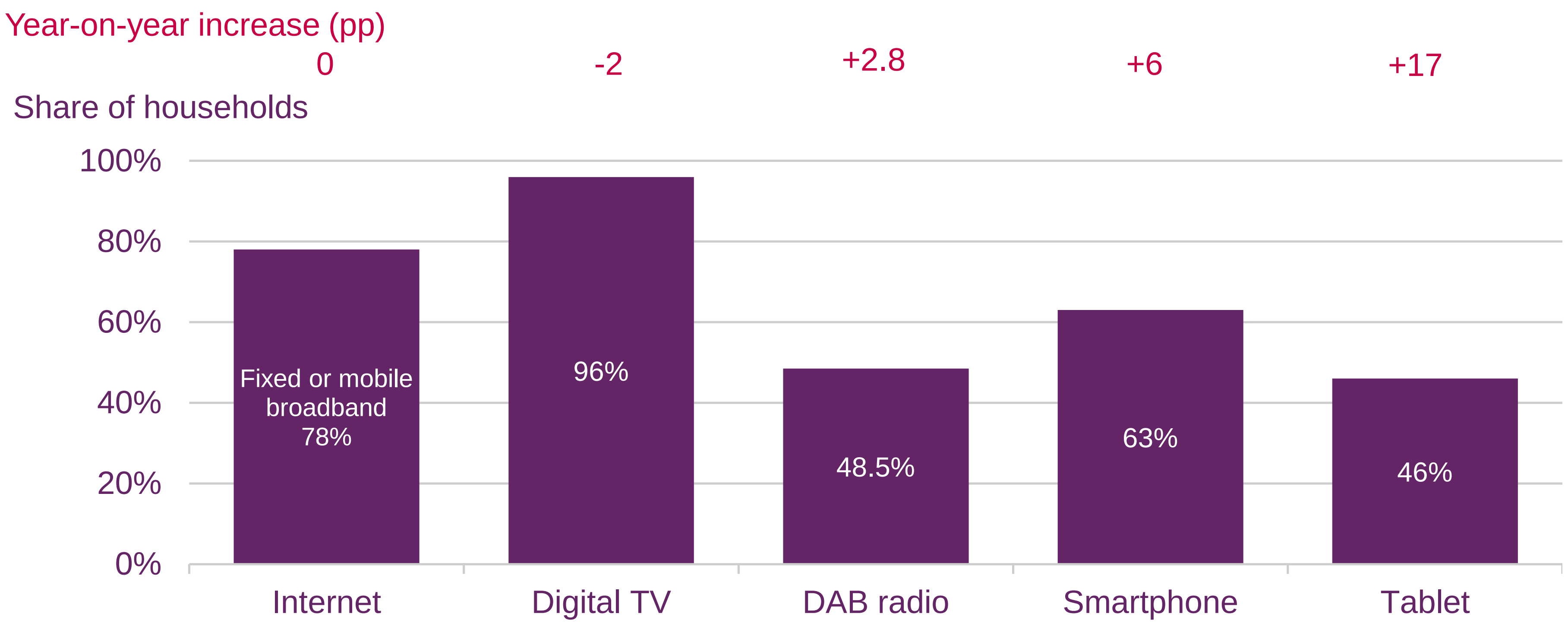


No. services	BBC national	Commercial national	No. local multiplexes
0	-	-	-
11	-	-	-
25	✓	✓	-
26-35	✓	✓	1
36-44	✓	✓	2 (see note)
45+	✓	✓	3

Source: Ofcom, September 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.

Figure 6

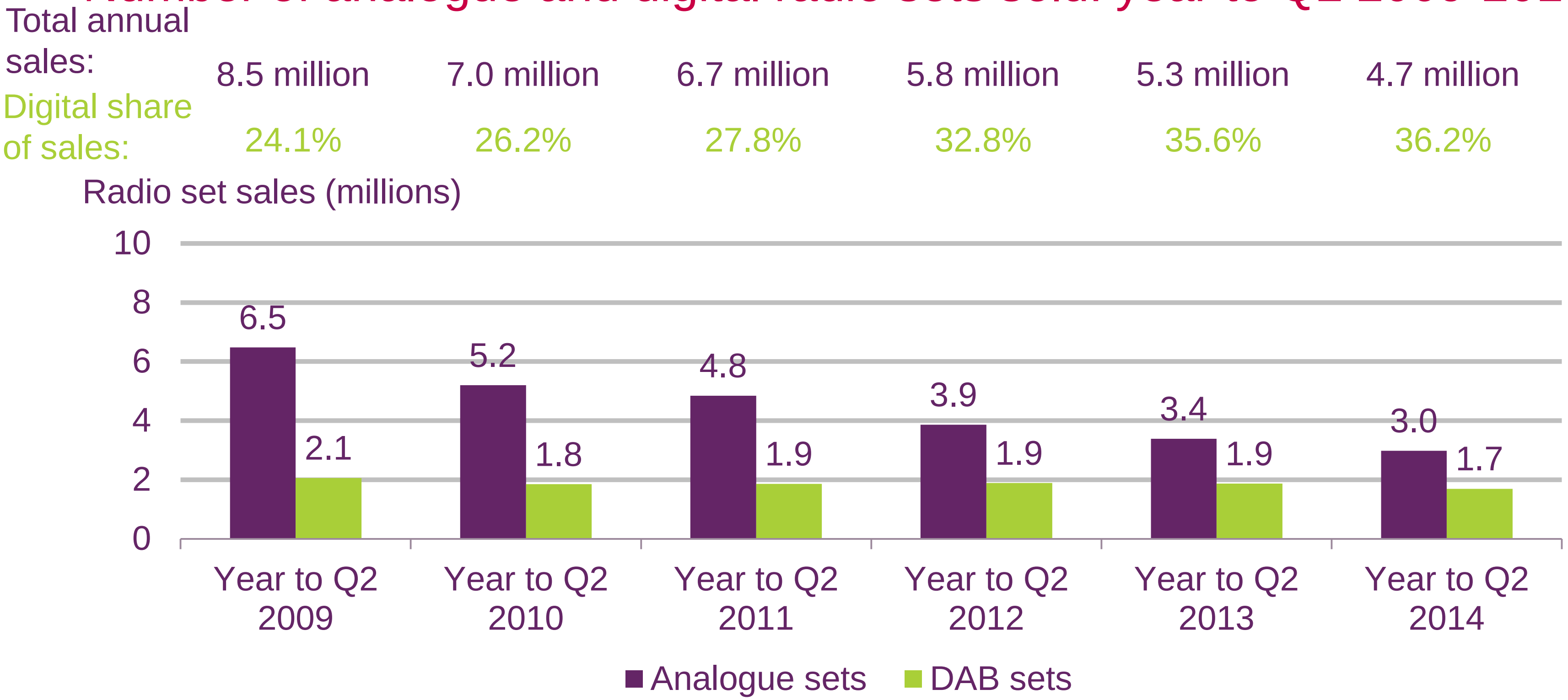
Take-up of equipment capable of receiving digital radio: 2014



Source: Ofcom Technology Tracker, RAJAR Q2 2014

Figure 7

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

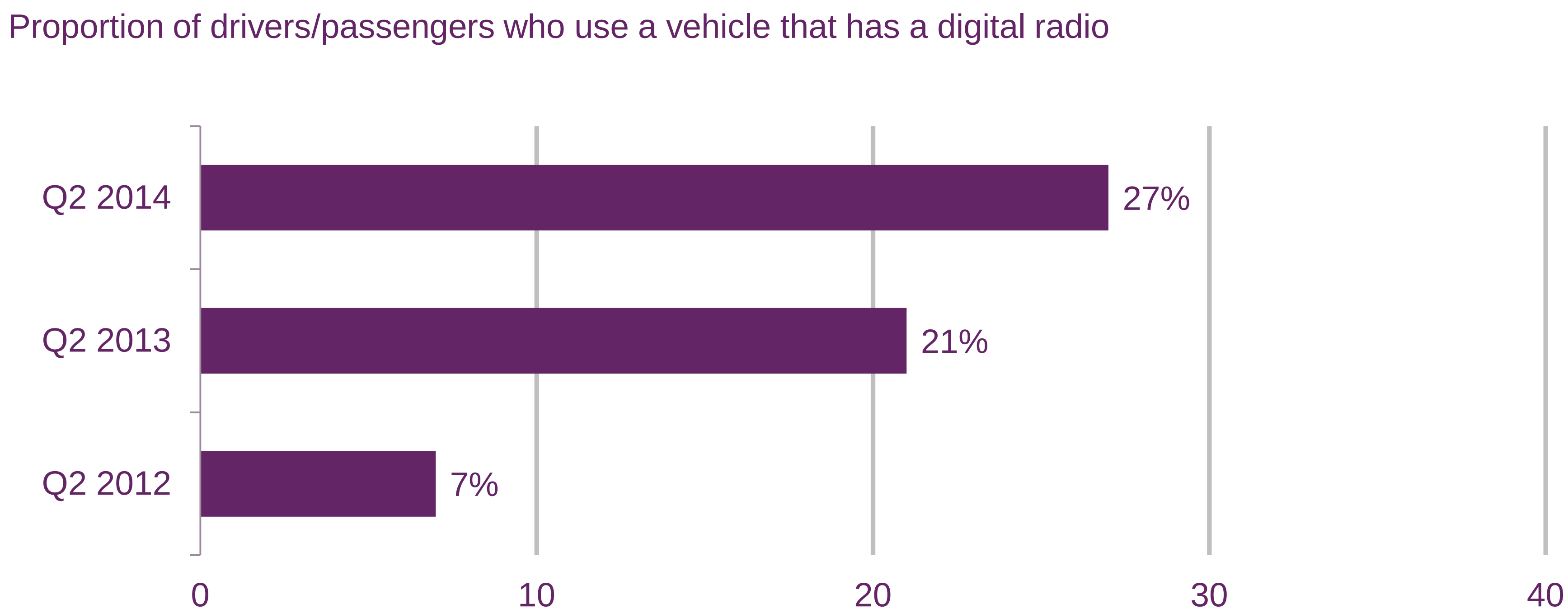


Source: GfK sales data, 2009-2014.

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

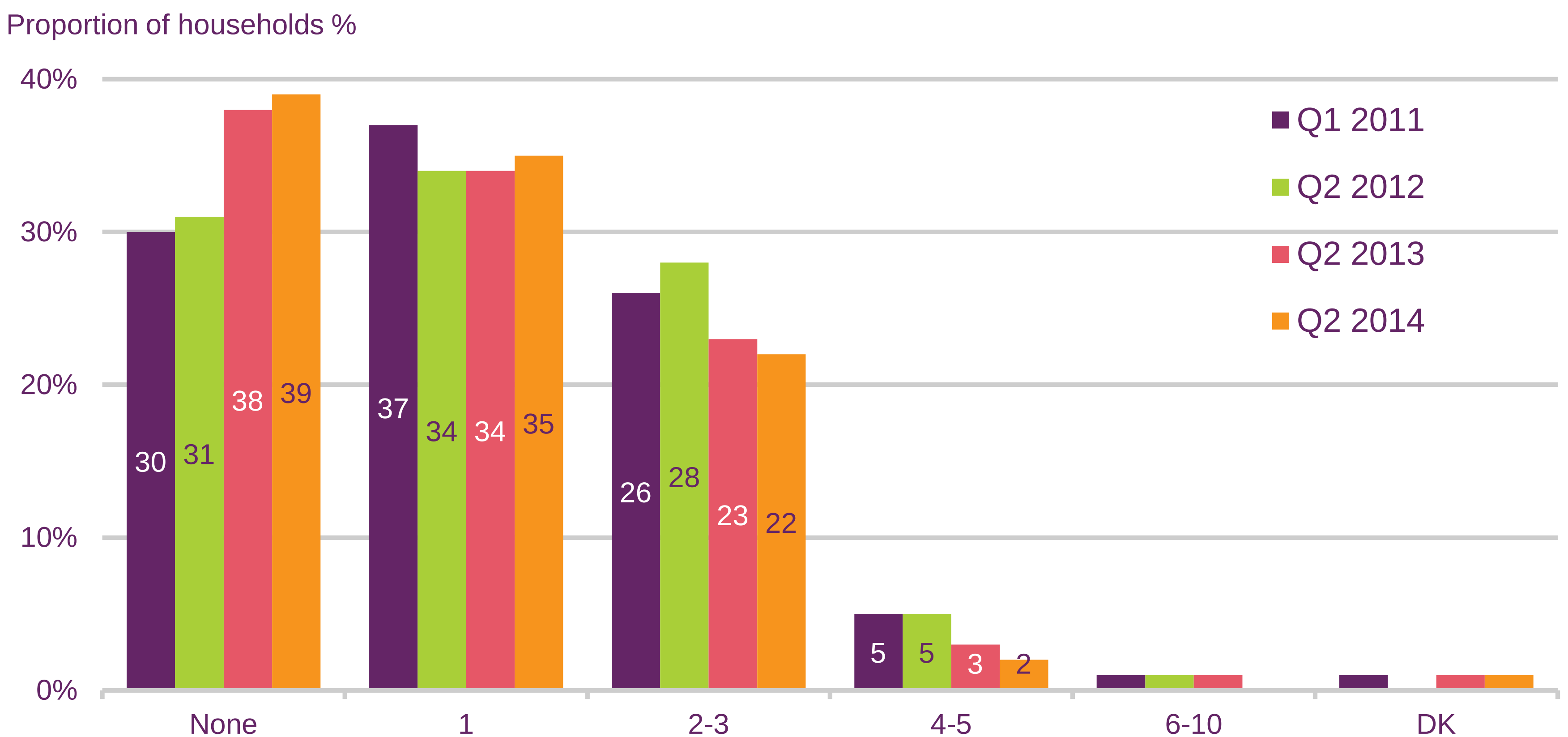
Status of digital radio availability in newly registered cars

Proportion of newly registered cars (%)

Source: CAP/SMMT

Figure 10

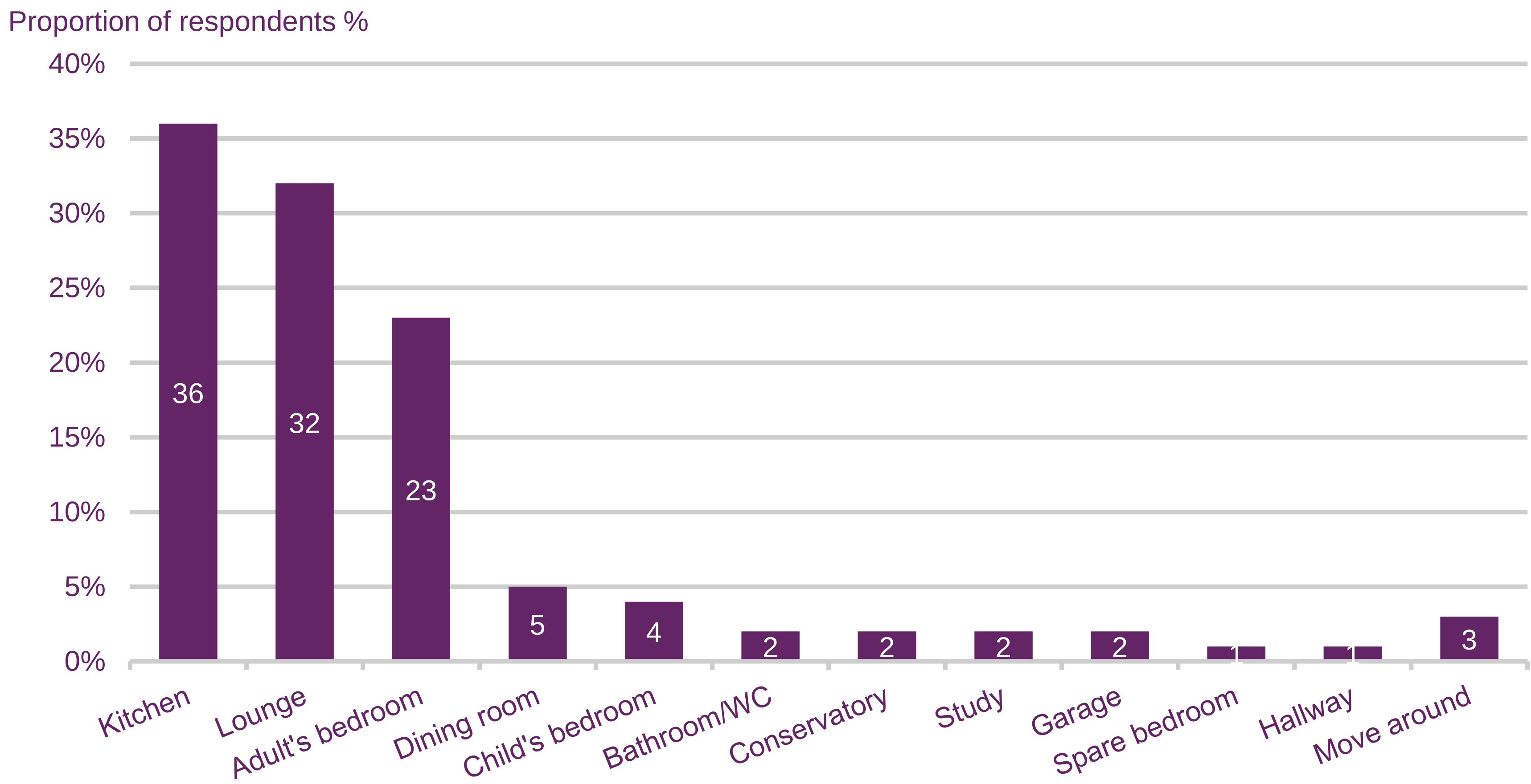
Number of radios listened to at home 'in most weeks'



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)

Figure 11

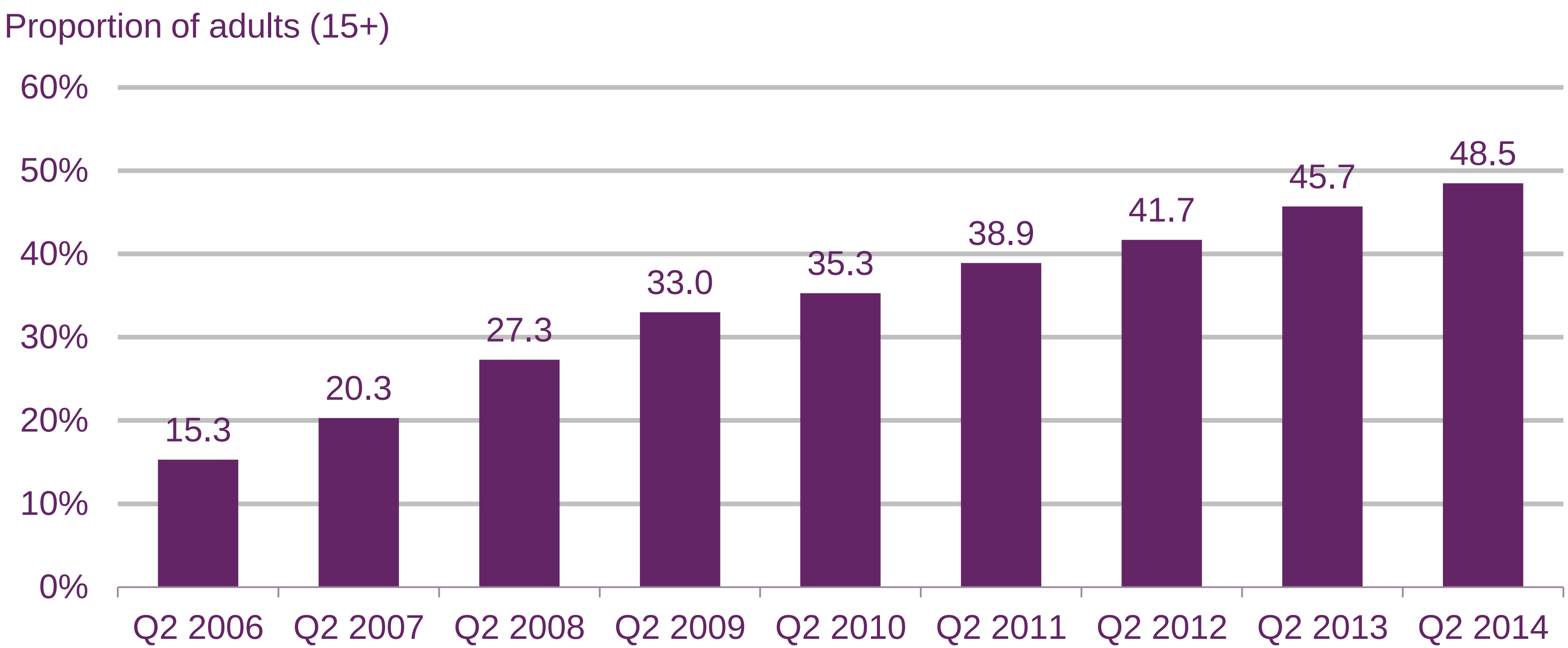
The location of radio sets in the home



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

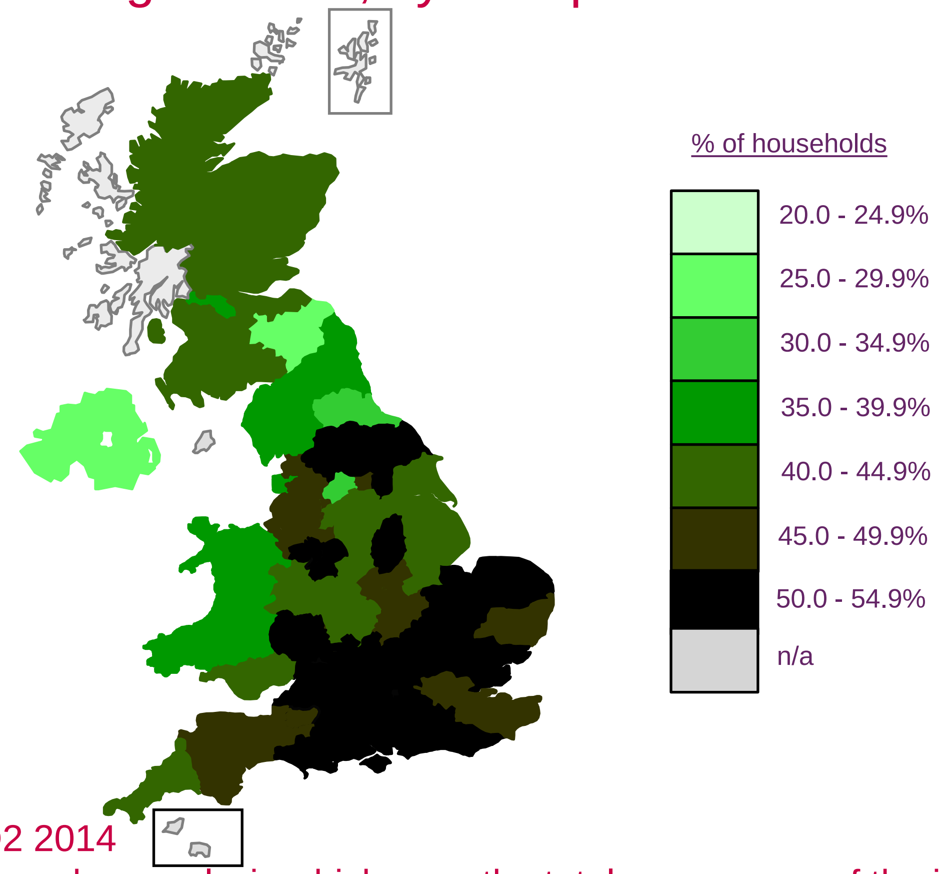
Proportion of individuals claiming to own a DAB set in the home



Source: RAJAR / Ipsos MORI / RSMB

Figure 13

Take-up of DAB digital radio, by multiplex area

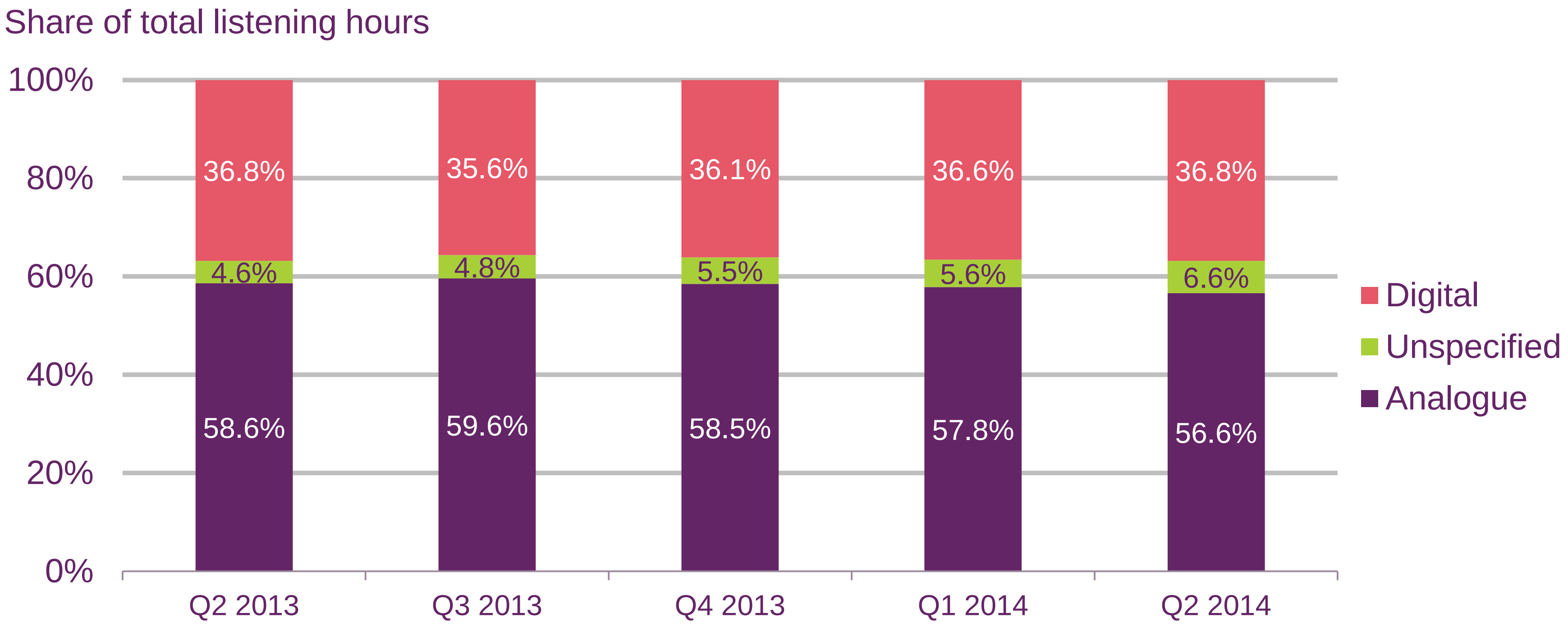


Source: RAJAR, Q2 2014

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

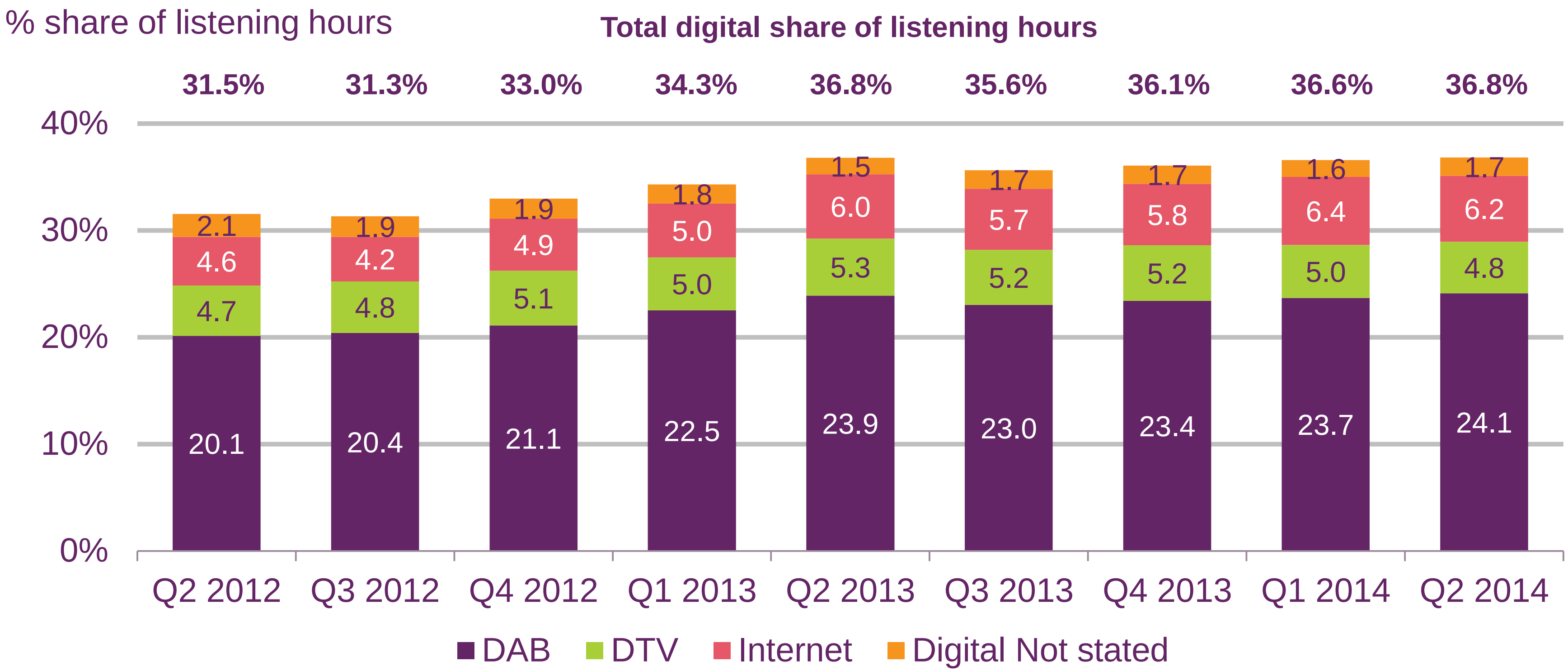
Distribution of listening hours across analogue and digital platforms, by quarter: Q2 2013 - Q2 2014



Source: RAJAR. All adults (15+)
Note: ‘Unspecified’ relates to listening where the radio platform was not confirmed by the listener.

Figure 15

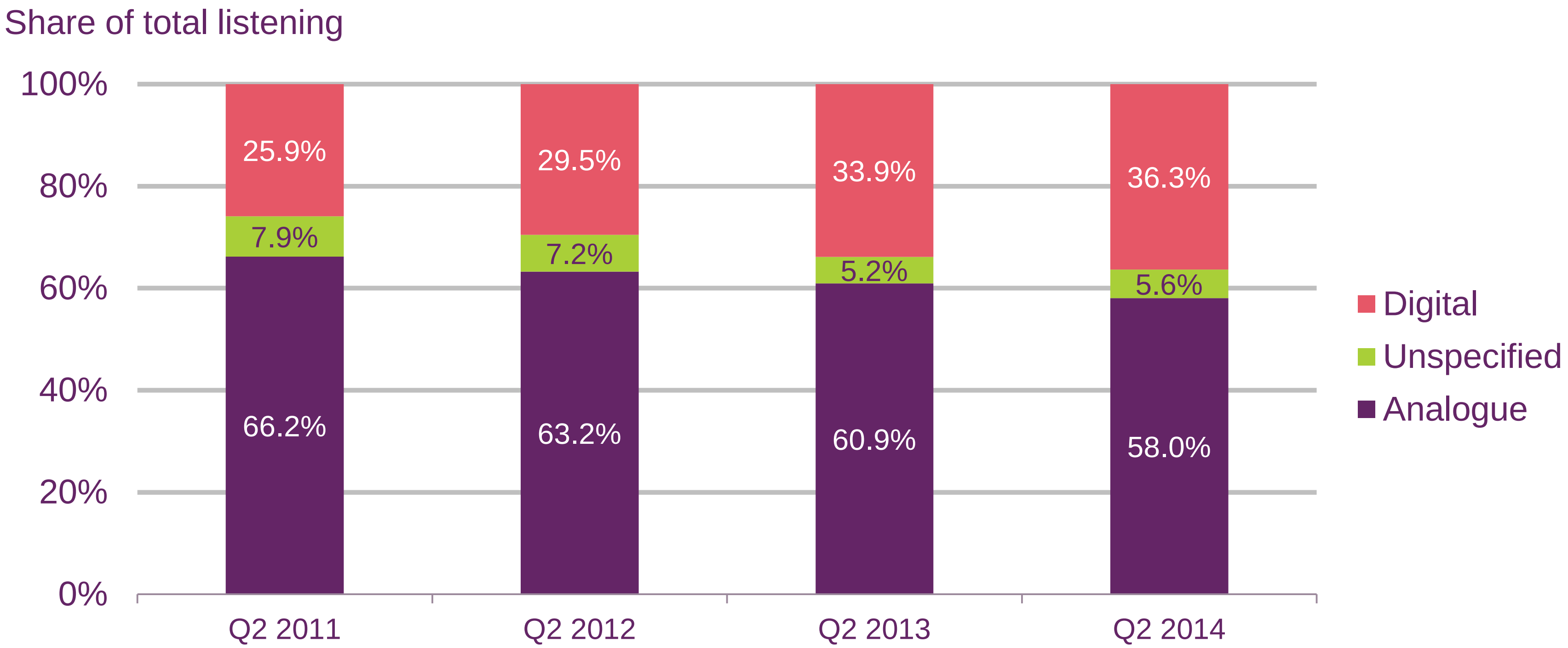
Distribution of listening hours across digital platforms, by quarter: Q2 2012 to Q2 2014



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

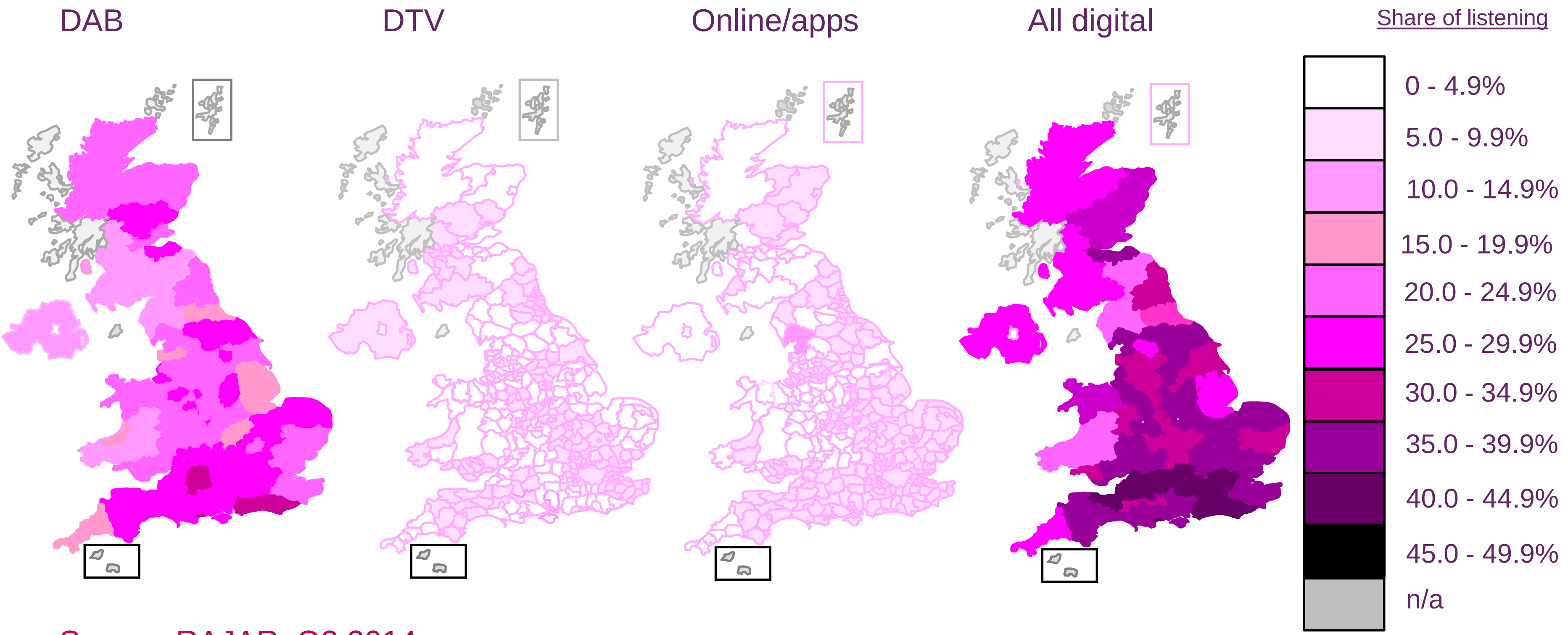
Distribution of listening hours across analogue and digital platforms, the 12 months to Q2: 2011 - 2014



Source: RAJAR. All adults (15+)
Note: ‘Unspecified’ relates to listening where the radio platform was not confirmed by the listener

Figure 17

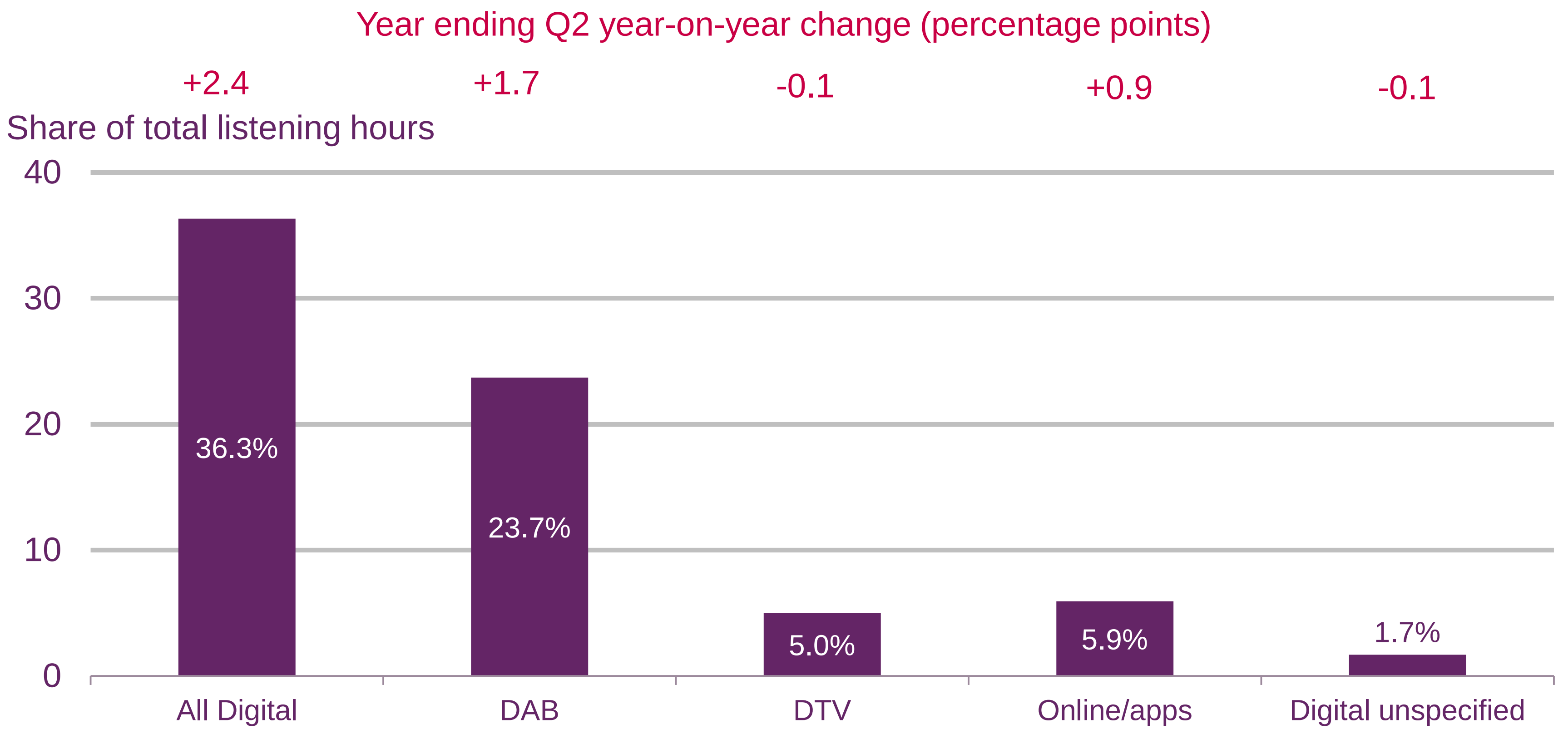
Share of listening, by digital platform and area



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

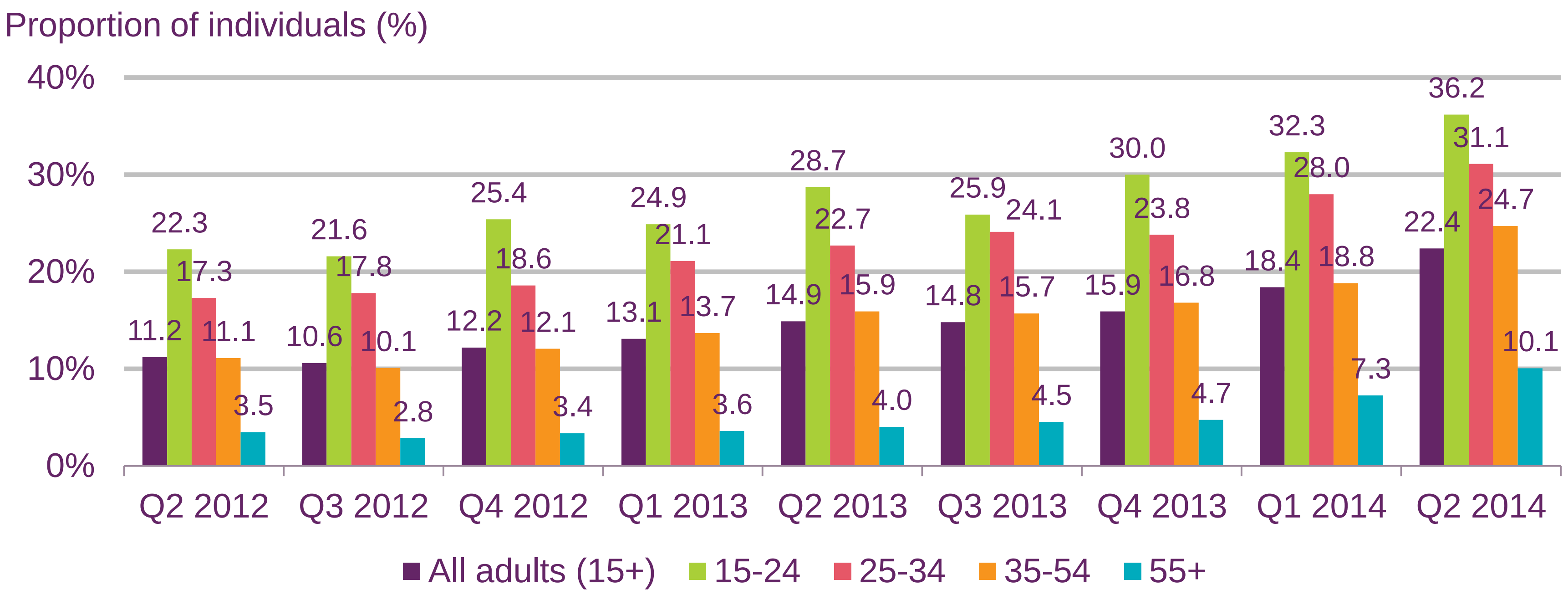
Digital radio's share of total radio listening hours, by platform



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

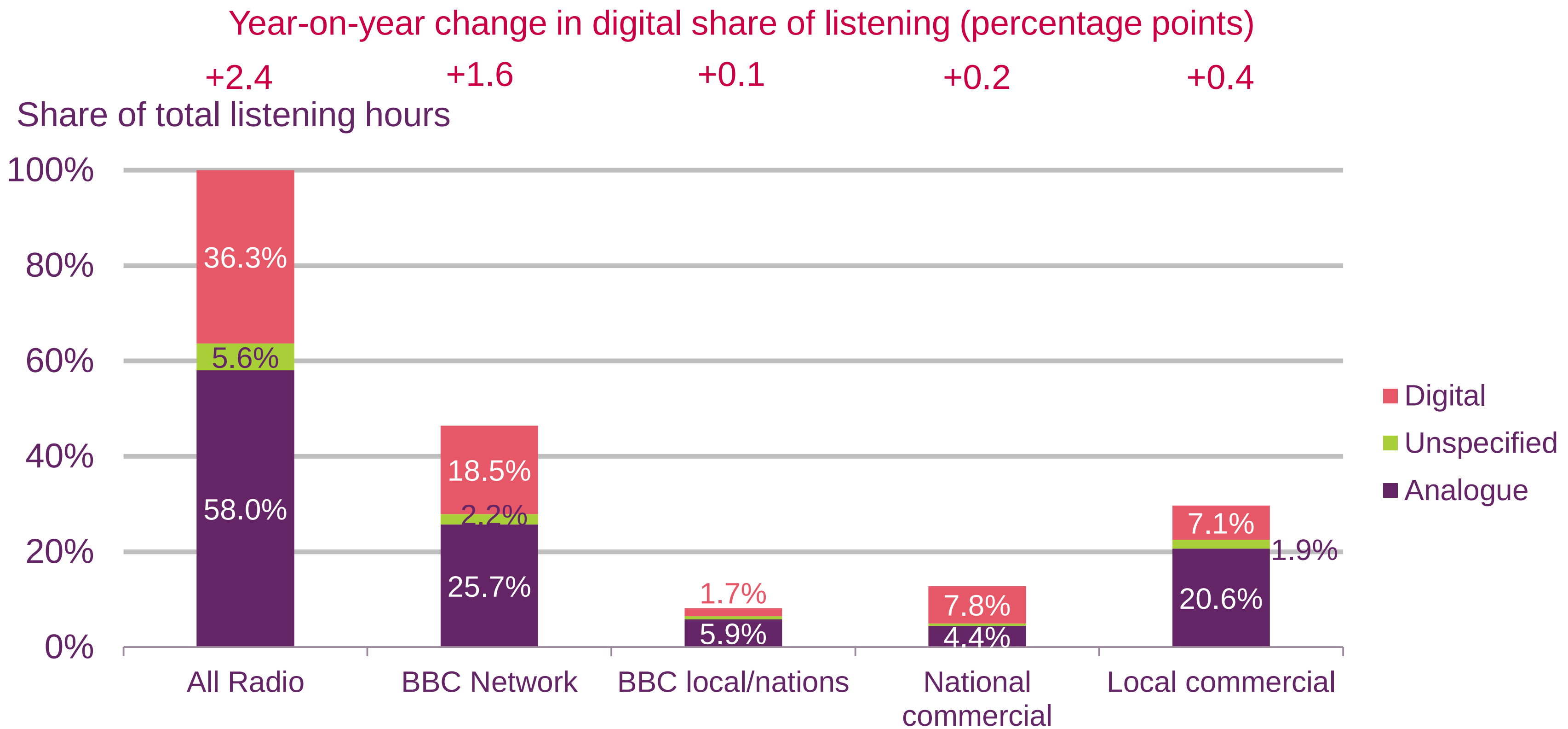
Proportion of individuals who claim to listen to radio on a mobile phone or tablet at least once per month



Source: RAJAR / Ipsos MORI / RSMB
Note: As of Q1 2014 the figures include listening via a tablet

Figure 20

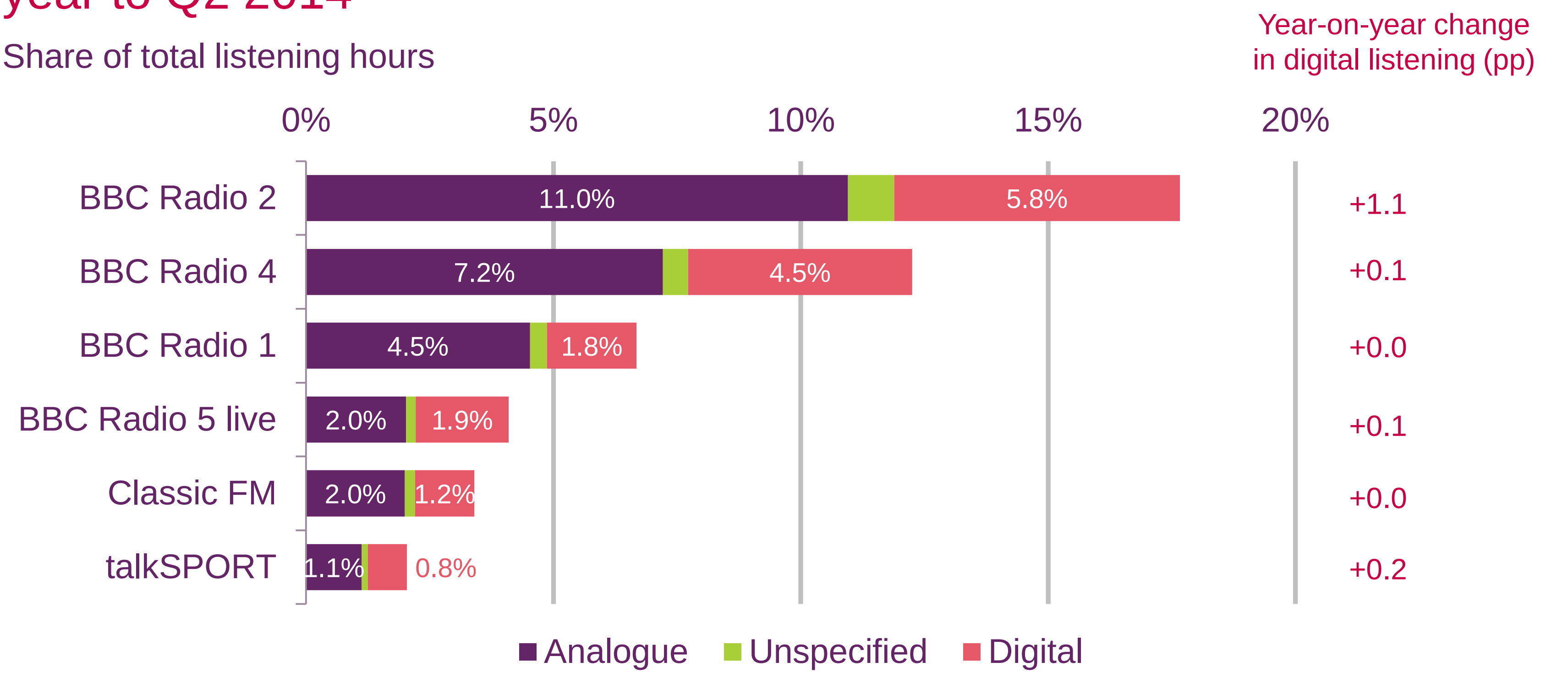
Distribution of listening hours, by service provider, analogue and digital platforms: year to Q2 2014



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

Figure 21

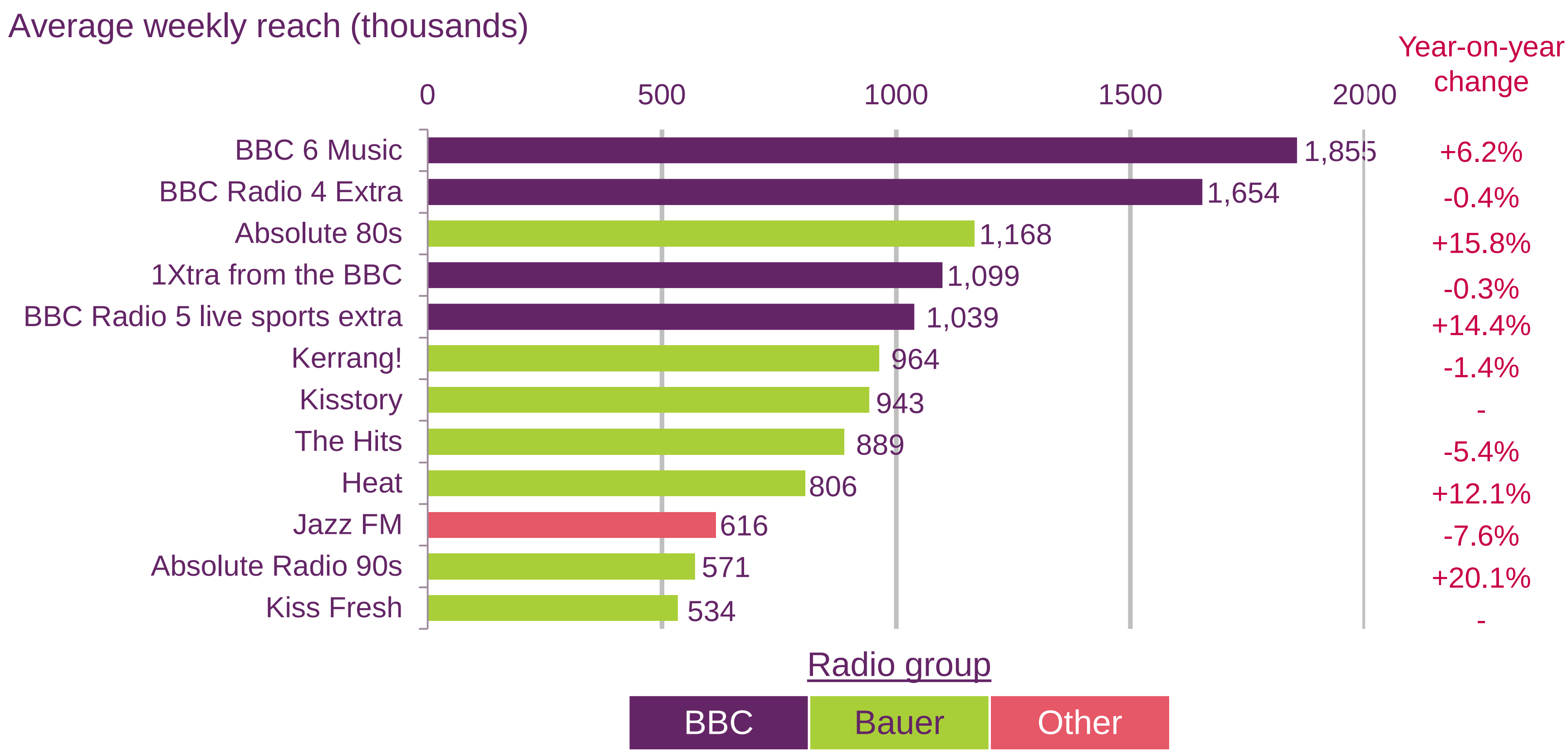
Distribution of listening hours, by service, analogue and digital platforms: year to Q2 2014



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

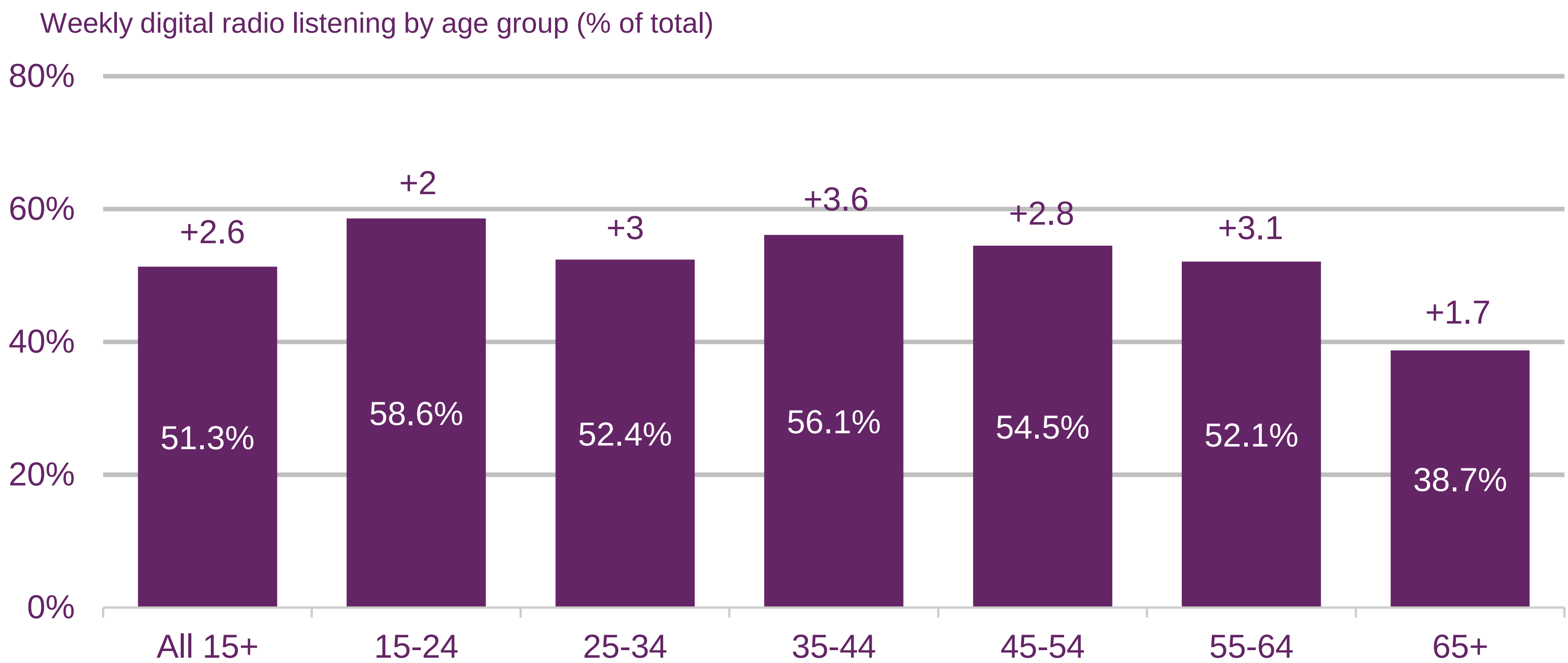
Digital-only stations, by average weekly reach



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

Figure 23

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



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

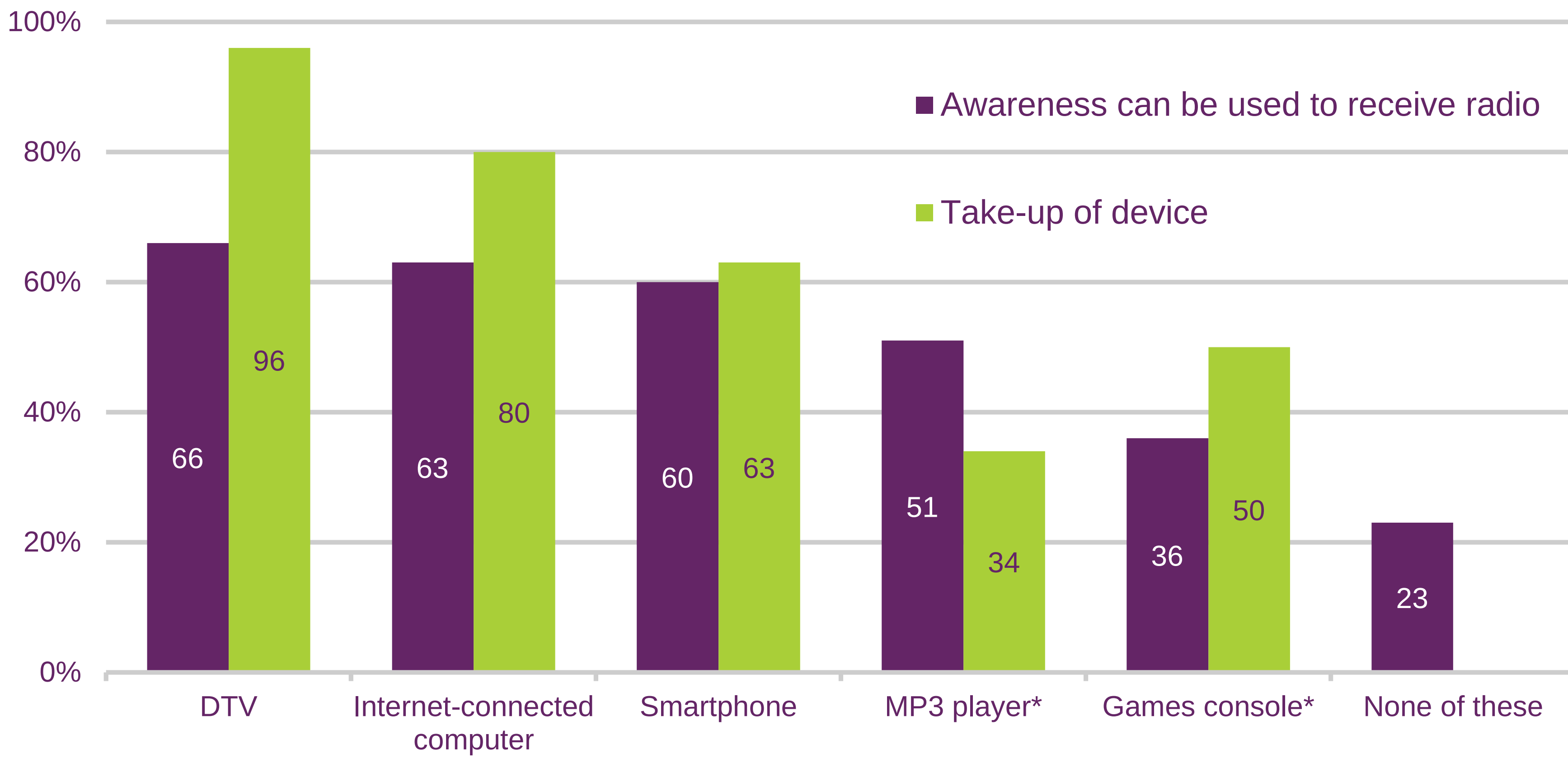
Figure 24

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

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

Figure 25

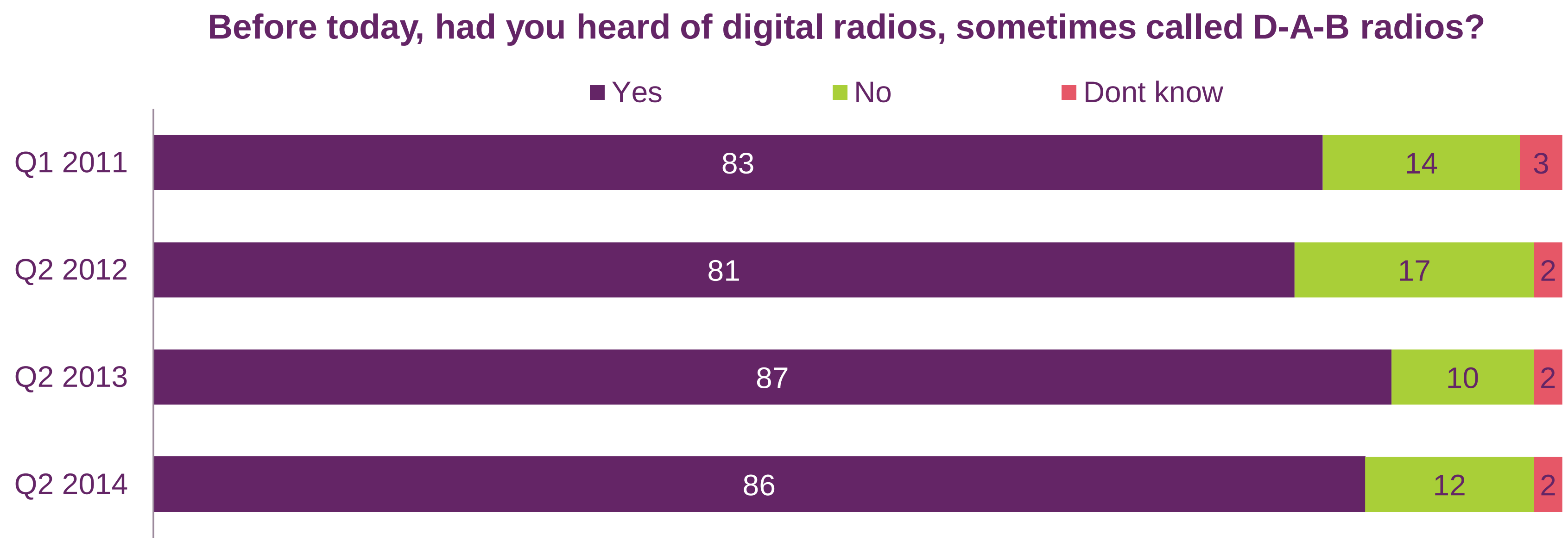
Awareness of devices capable of receiving radio services



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

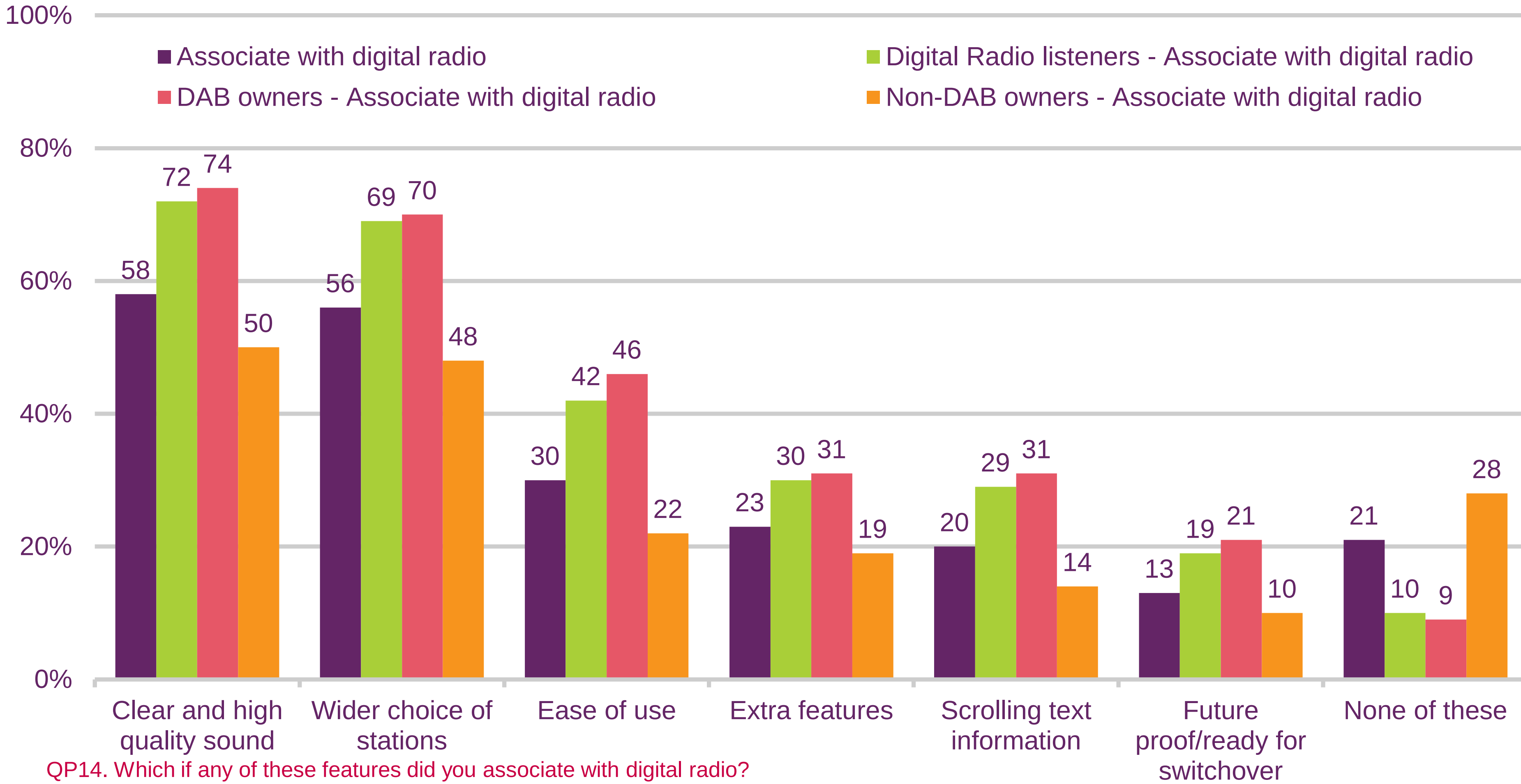
Awareness of digital radios sometimes called ‘DAB radios’



Source: Ofcom Technology Tracker, Wave 1 2011, Wave 2 2012, Wave 2 2013, Wave 2 2014
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 27

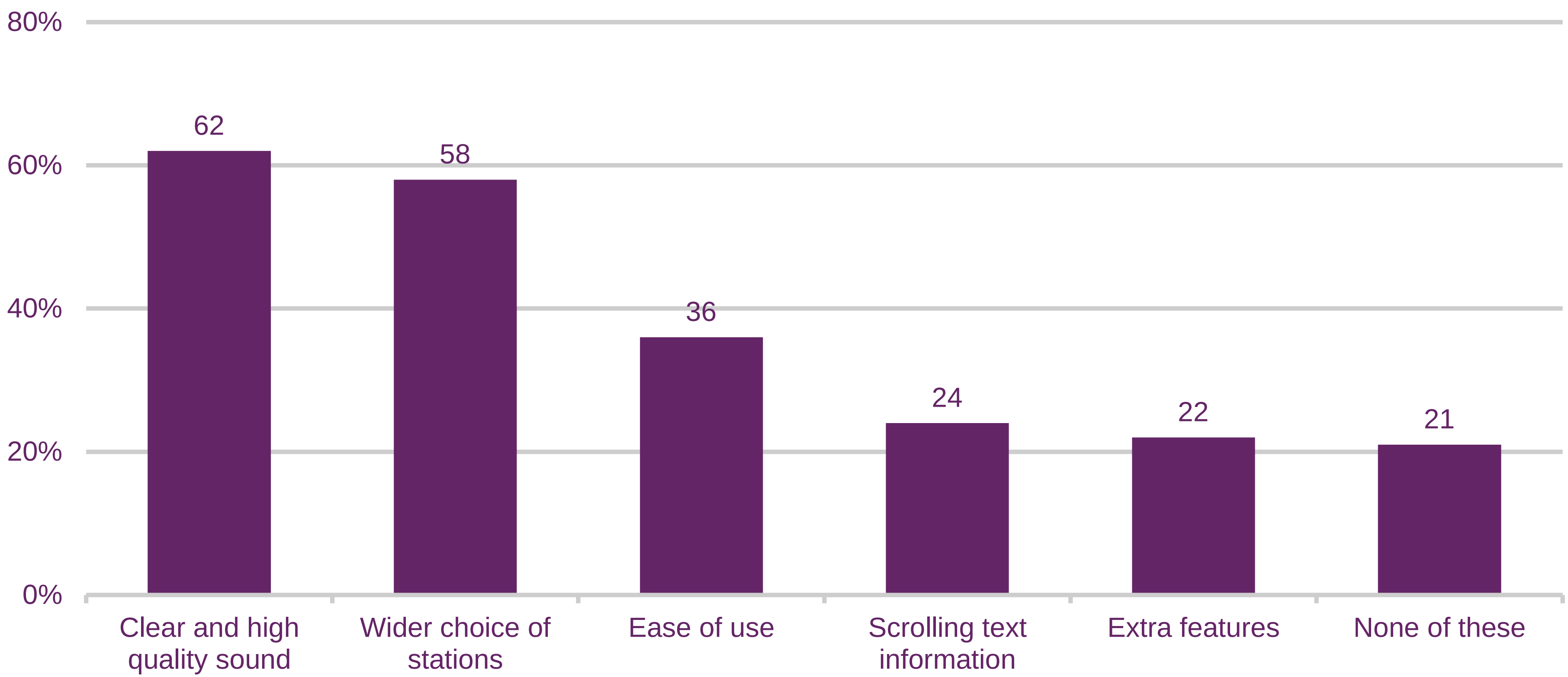
Associations of digital radio among those with and without DAB



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

Figure 28

Features of digital radio that listeners have experienced



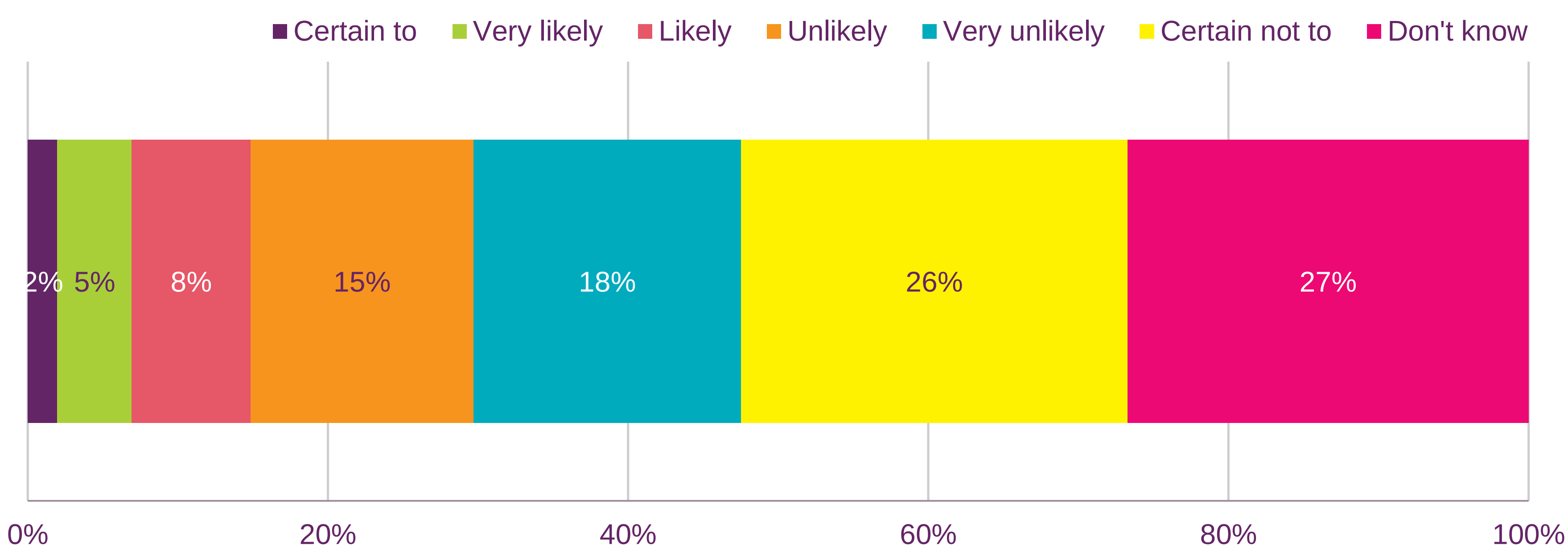
QP15. As a digital radio listener which, if any, of these features of digital radio have you experienced?
Source: Ofcom research, Quarter 2 2014, n=1125
Base: All with any type of DAB digital radio (in home or vehicle)

Figure 29

Likelihood of purchasing a DAB set

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

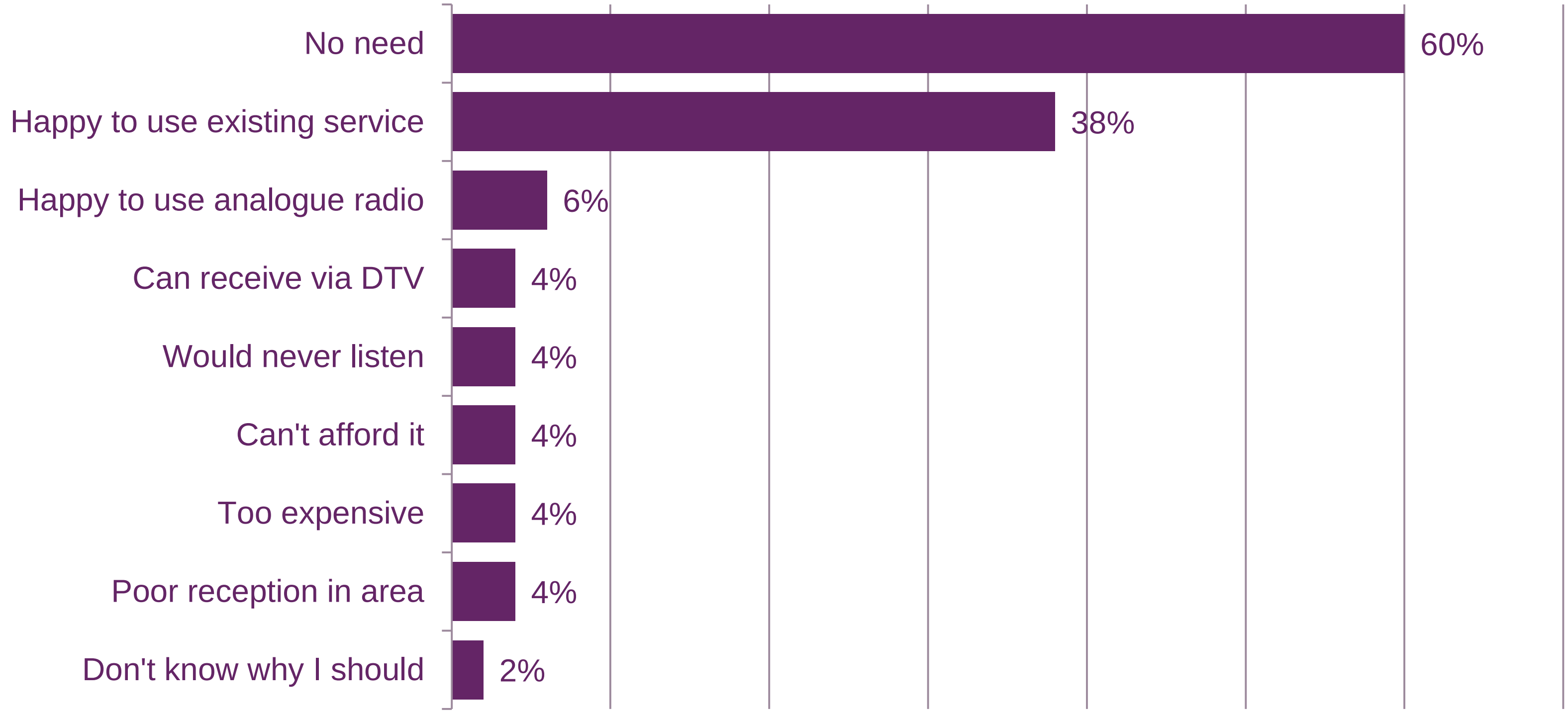
How likely is it that your household will get a DAB radio in the next 12 months?



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



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?