

Figure 4.1

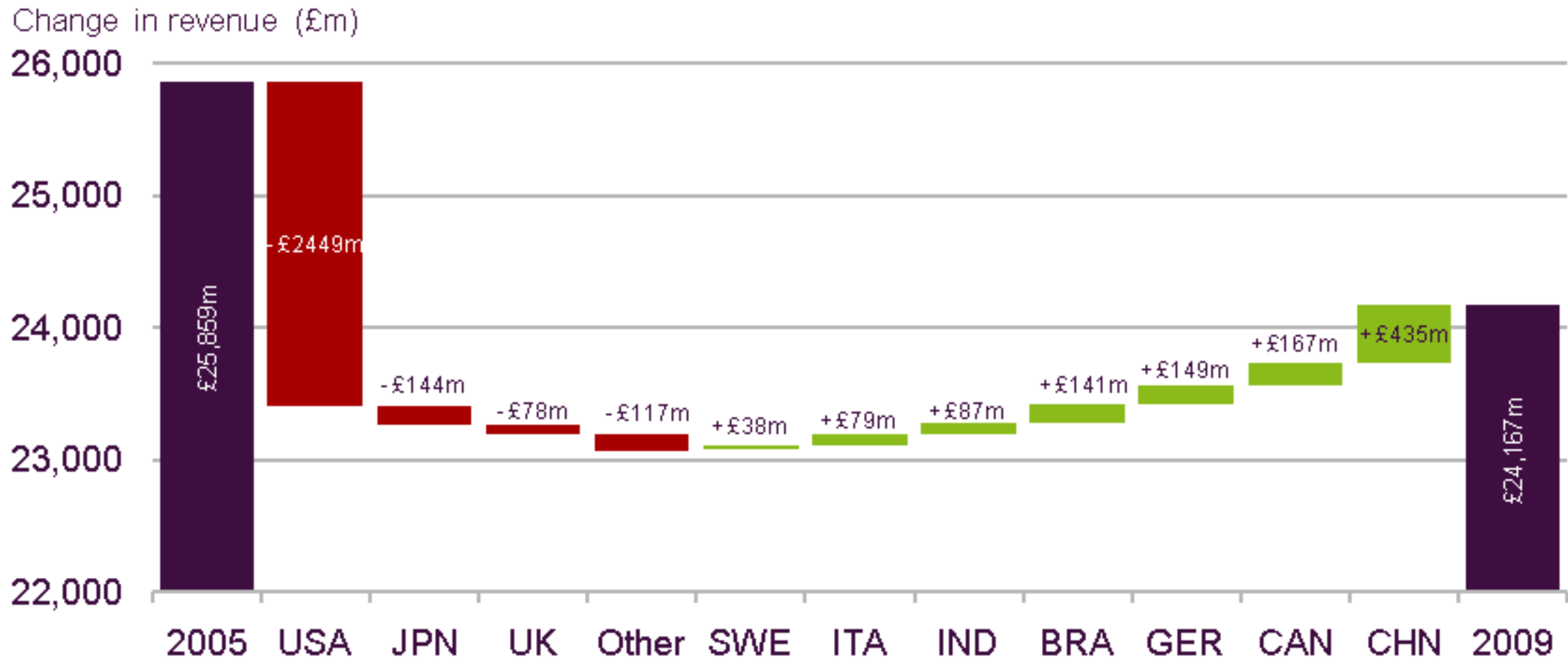
Key radio market indicators: 2009

	UK	FRA	GER	ITA	USA	CAN	JPN	AUS	ESP	NED	SWE	IRL	POL	BRA	RUS	IND	CHN
Total industry revenue (£bn)	1.2	1.3	3.0	1.1	10.7	0.9	2.6	0.5	0.5	0.4	0.3	0.2	0.1	0.3	0.2	0.1	0.8
Revenue change (% YOY)	-7.1	-4.3	+1.9	-5.1	-15.7	-6.6	-3.9	-5.7	-17.5	-4.8	-1.7	-13.3	-22.9	+12.3	-35.7	+18.2	+7.2
Revenues per capita (£)	19	20	37	20	35	27	20	22	10	24	32	42	3	1.6	1.3	0.1	0.6
% income from public licence fee	64	63	80	57	n/a	n/a	62	n/a	n/a	41	84	39	14	n/a	n/a	n/a	n/a
Listening (hours/head/week)	22.1	20.9	21.1	19.4	18.5	18.3	12.6	n/a	12.6	23.5	17.3	31.0	32.9	n/a	39.3	n/a	n/a
Public radio share (%)	55	22	58	19	5	13	8	n/a	6	32	65	33	25	n/a	24	n/a	n/a

Source: Ofcom, PricewaterhouseCoopers, EBU, Warc data

Figure 4.2:

Absolute changes in radio revenues by country, 2005 - 2009



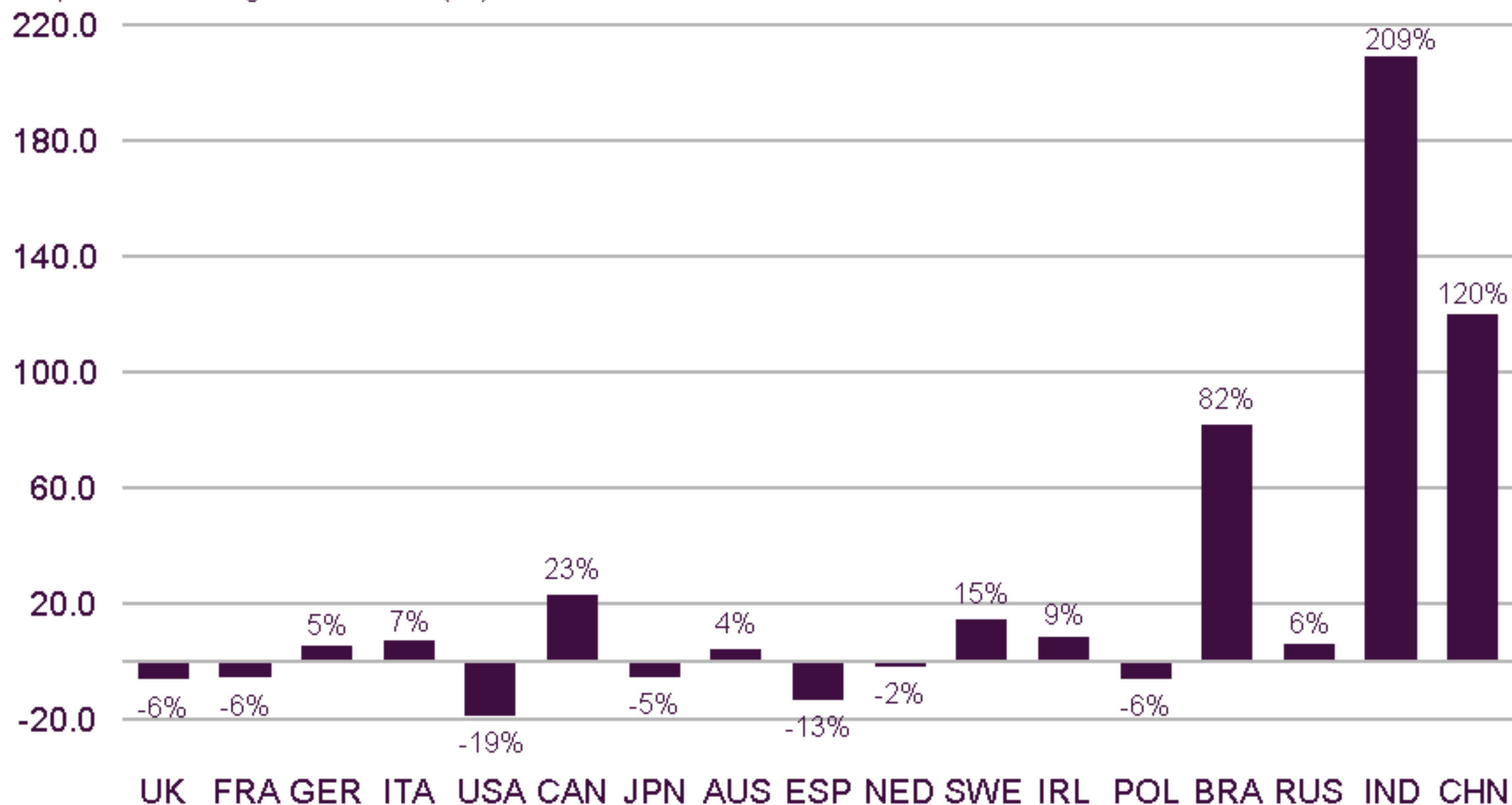
Source: Ofcom analysis based on data taken from PricewaterhouseCoopers Global Entertainment and Media Outlook 2010-2014 @ www.pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility.

Note: Ofcom has used an exchange rate of \$1.5643 to the GBP, representing the IMF average for 2009.

Figure 4.3:

Proportionate changes in radio revenue 2005 - 2009

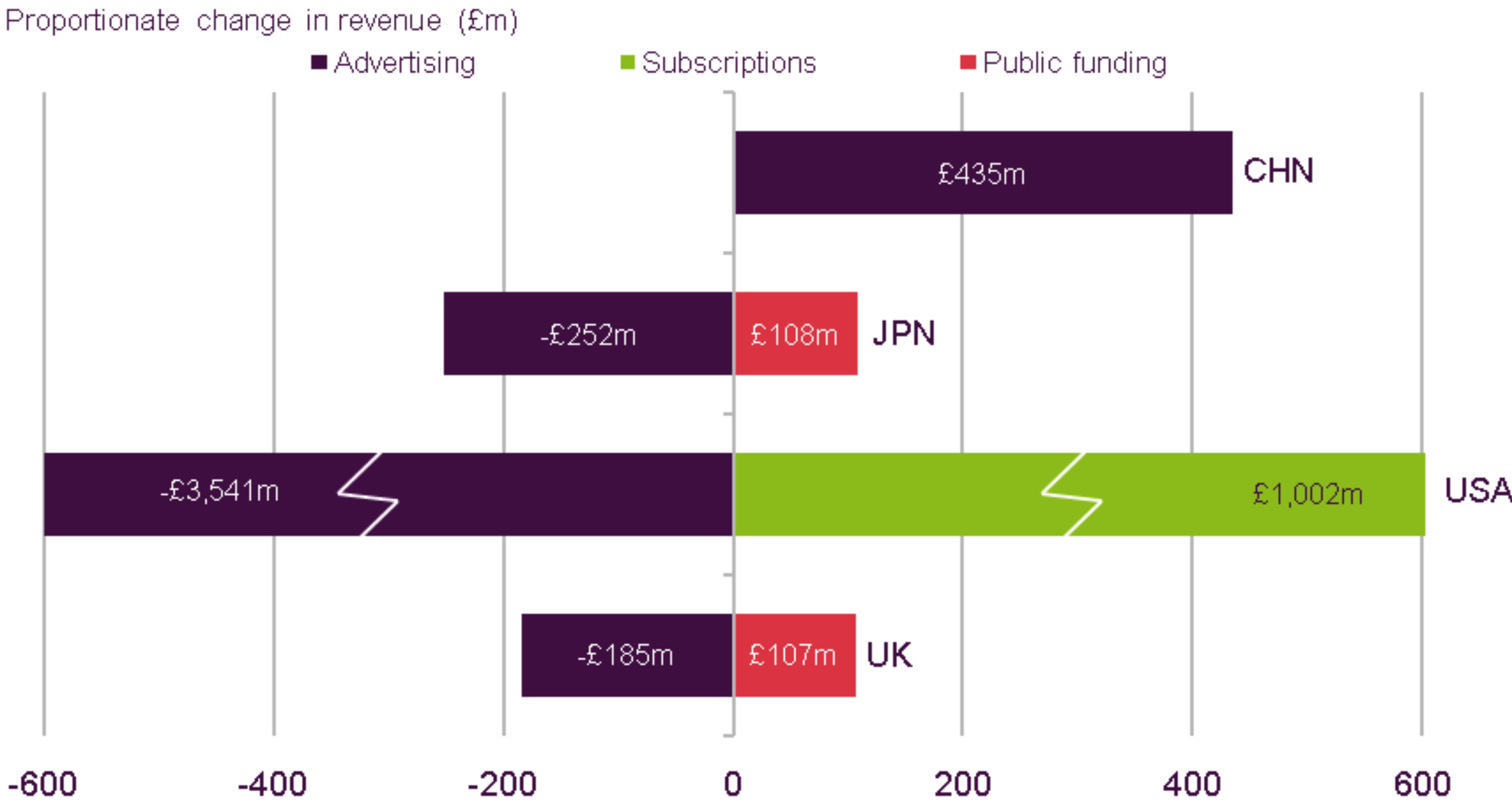
Proportional change in revenue (%)



Source: Ofcom analysis based on data taken from PricewaterhouseCoopers Global Entertainment and Media Outlook 2010-2014 @ www.pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility.

Note: Ofcom has used an exchange rate of \$1.5643 to the GBP, representing the IMF average for 2009.

Figure 4.4:
The most substantial revenue swings by component, 2005-2009

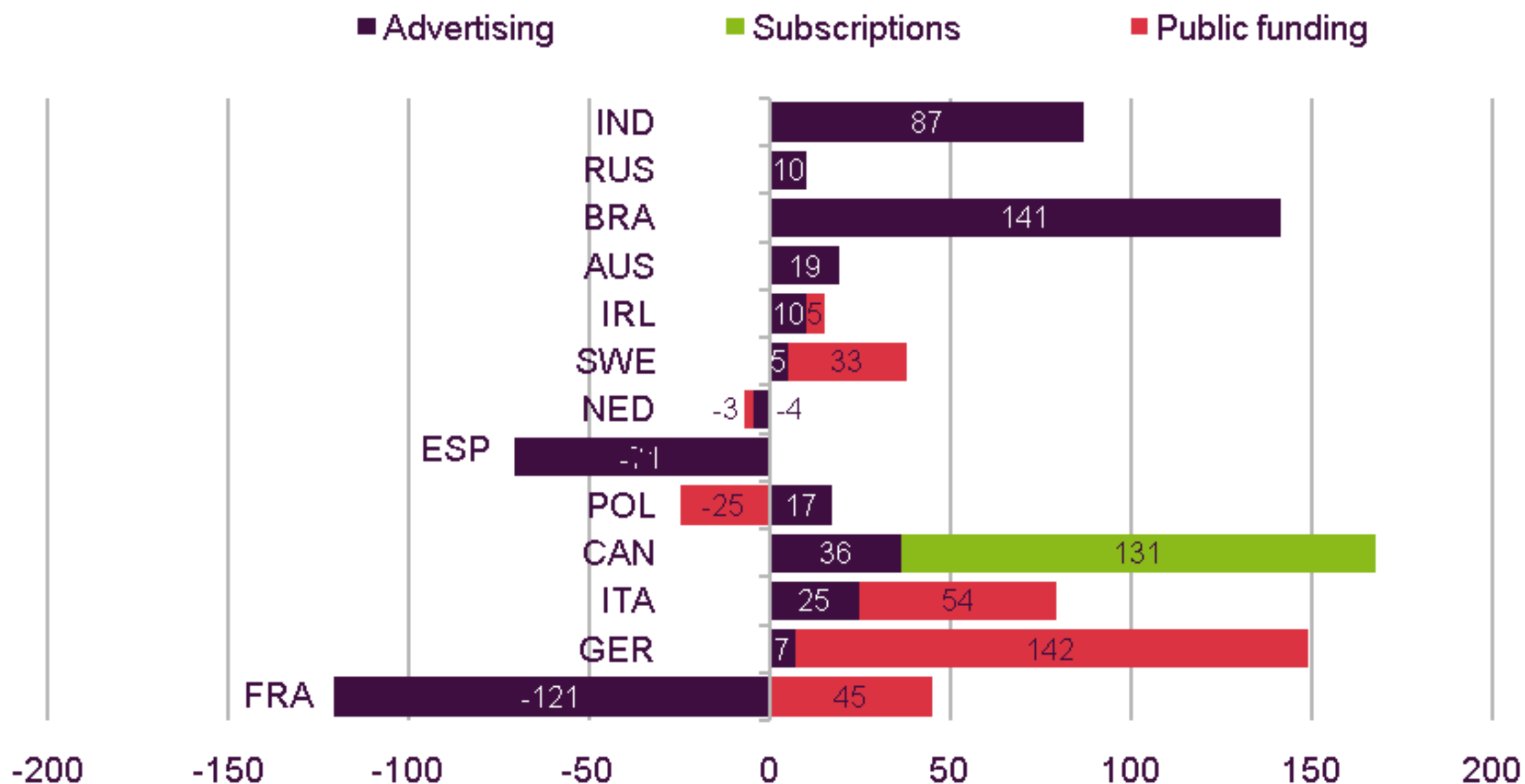


Source: Ofcom analysis based on data taken from PricewaterhouseCoopers Global Entertainment and Media Outlook 2010-2014 @ www.pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility.
 Note: Ofcom has used an exchange rate of \$1.5643 to the GBP, representing the IMF average for 2009.

Figure 4.5:

The smaller revenue swings by component, 2005-2009

Proportionate change in revenue (£m)



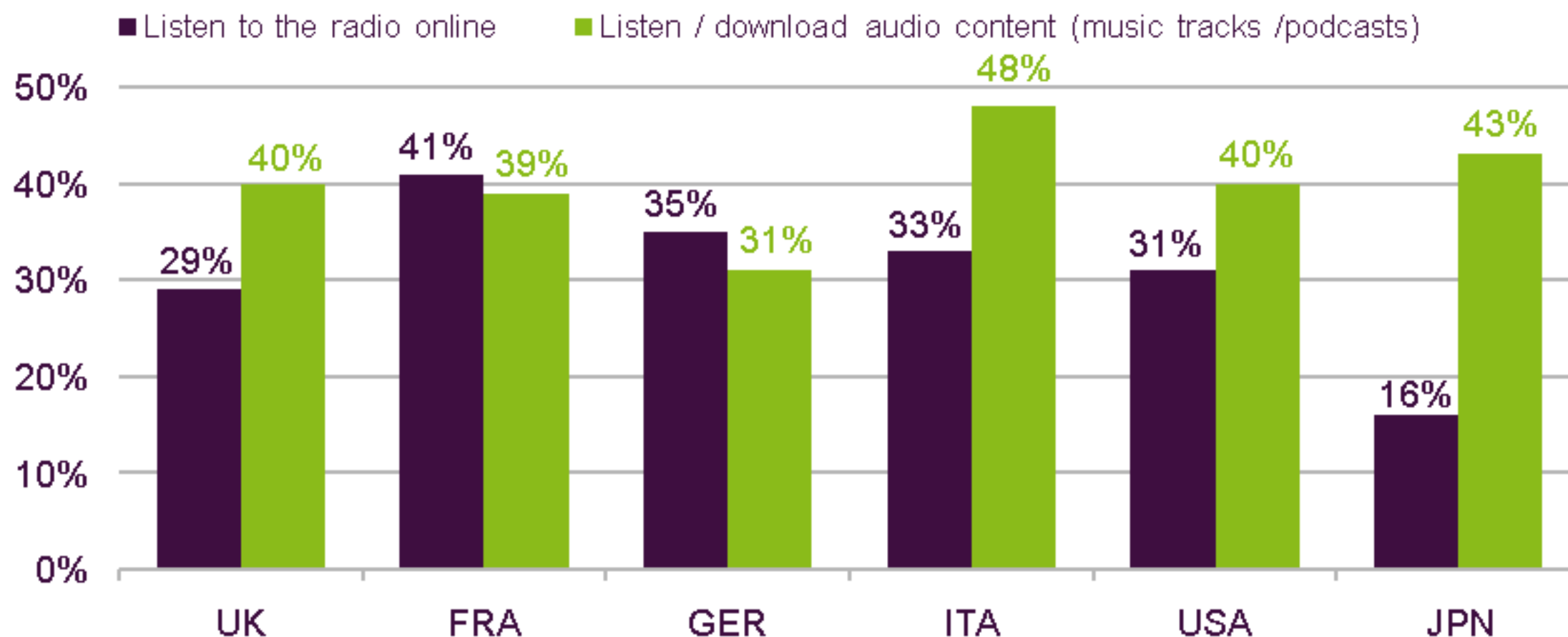
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Figure 4.6

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

% adults using internet at home



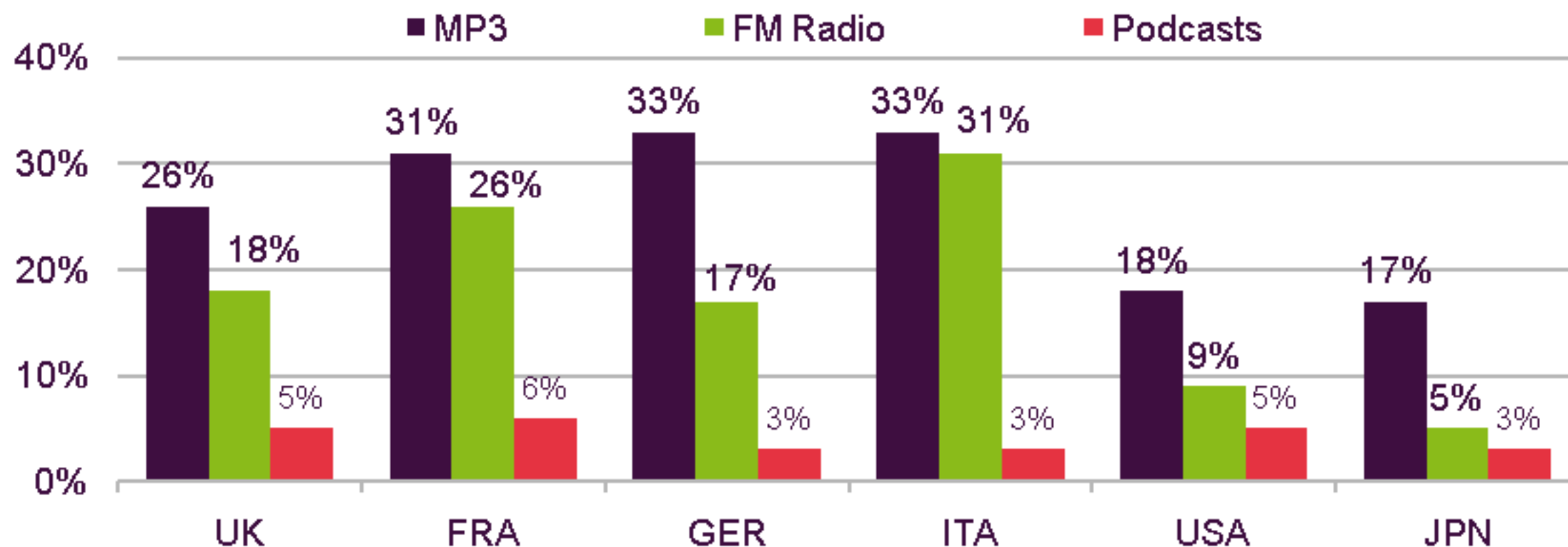
Source: Ofcom research, October 2010. Base sizes (all adults who use the internet): UK=1016, France=1017, Germany=1014, Italy=1002, USA=1017, Japan=1001.

Question: 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

Which, if any, of the following activities do you use your mobile phone for: listening to FM radio, MP3 tracks, podcasts?

% adults using mobile phone to listen to: MP3 tracks, FM Radio, or podcasts

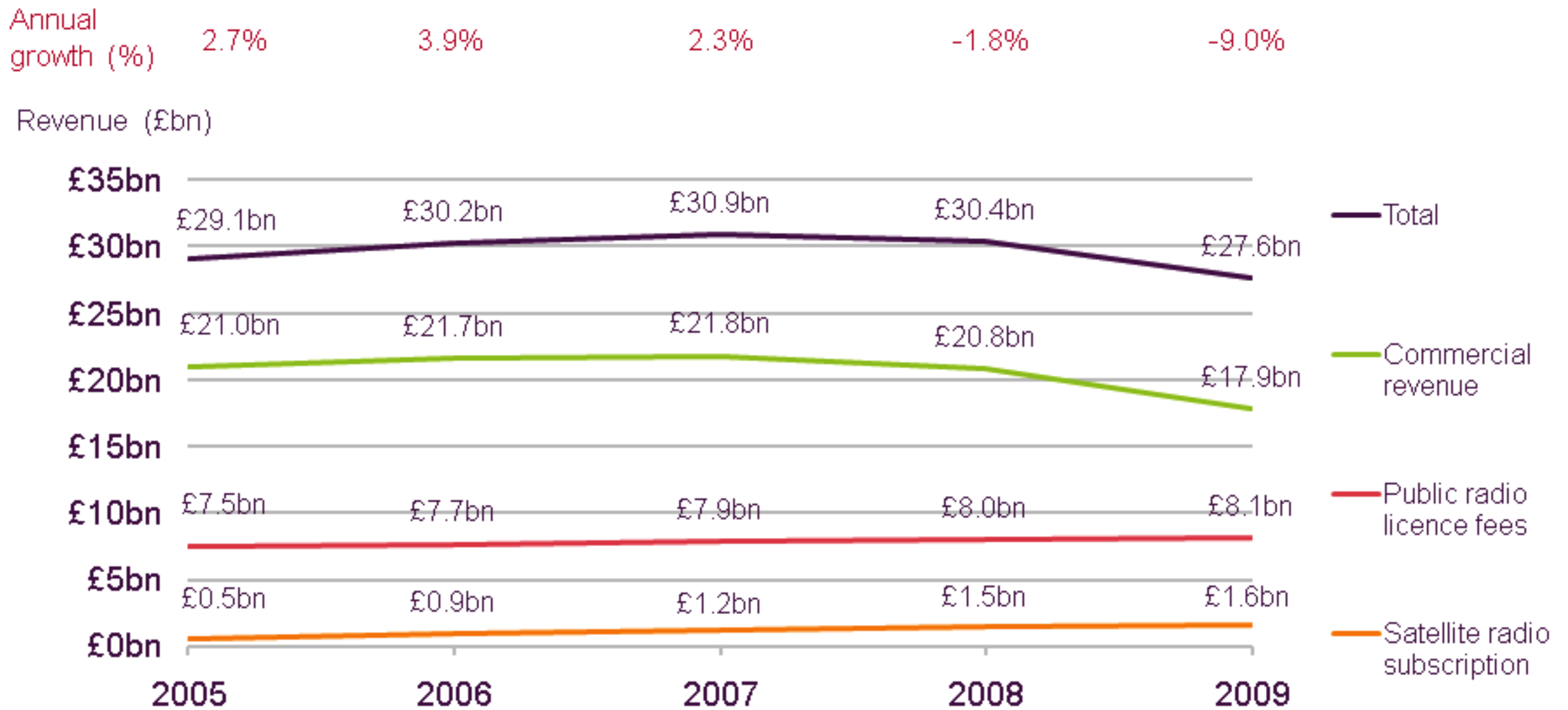


Source: Ofcom research, October 2010. Base sizes (all adults who use the internet): UK=1016, France=1017, Germany=1014, Italy=1002, USA=1017, Japan=1001.

Question '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, 2005-2009



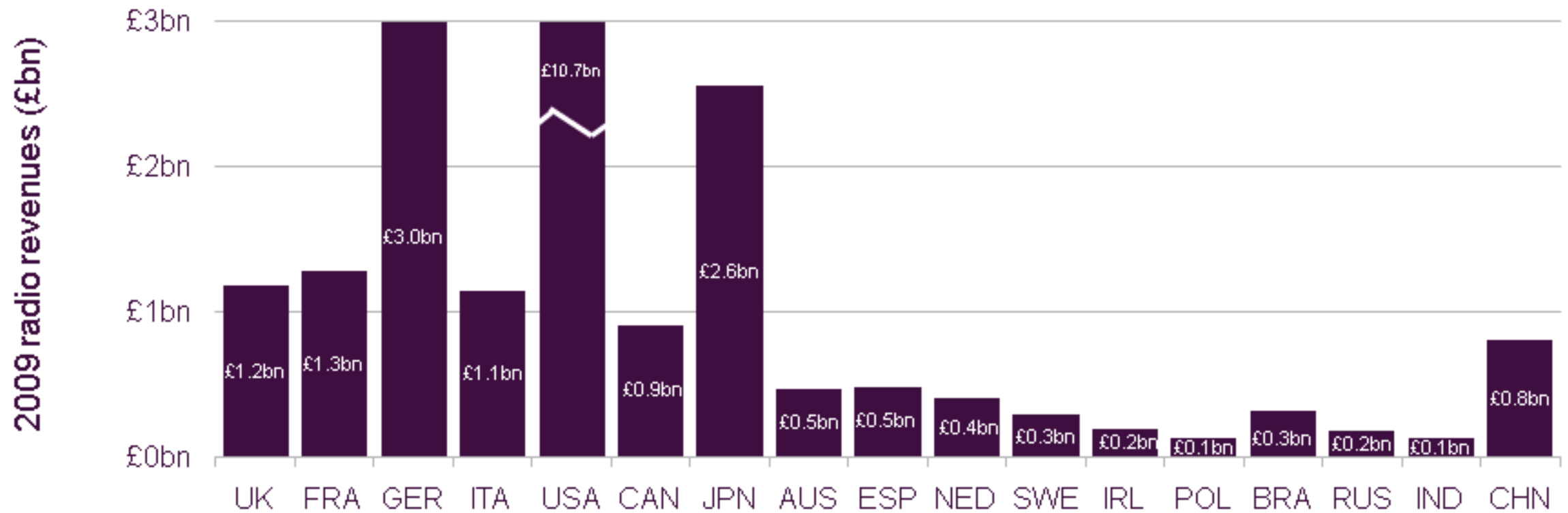
Source: Ofcom analysis based on data taken from PricewaterhouseCoopers Global Entertainment and Media Outlook 2010-2014 @ www.pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility.

Note: Ofcom has used an exchange rate of \$1.5643 to the GBP, representing the IMF average for 2009.

Figure 4.9

Radio industry revenue, 2009

Change on 2008: (£m) -£89m -£58m +£57m -£61m -£1,992m -£64m -£104m -£28m -£100m -£20m -£5m -£29m -£36m +£35m -£100m +£20m +£54m
 (%) -7.1% -4.3% +1.9% -5.1% -15.7% -6.6% -3.9% -5.7% -17.5% -4.8% -1.7% -13.3% -22.9% +12.3% -35.7% +18.2% +7.2%



Source: Ofcom analysis based on data taken from PricewaterhouseCoopers Global Entertainment and Media Outlook 2010-2014 @ www.pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility.
 Note: Ofcom has used an exchange rate of \$1.5643 to the GBP, representing the IMF average for 2009.

Figure 4.10

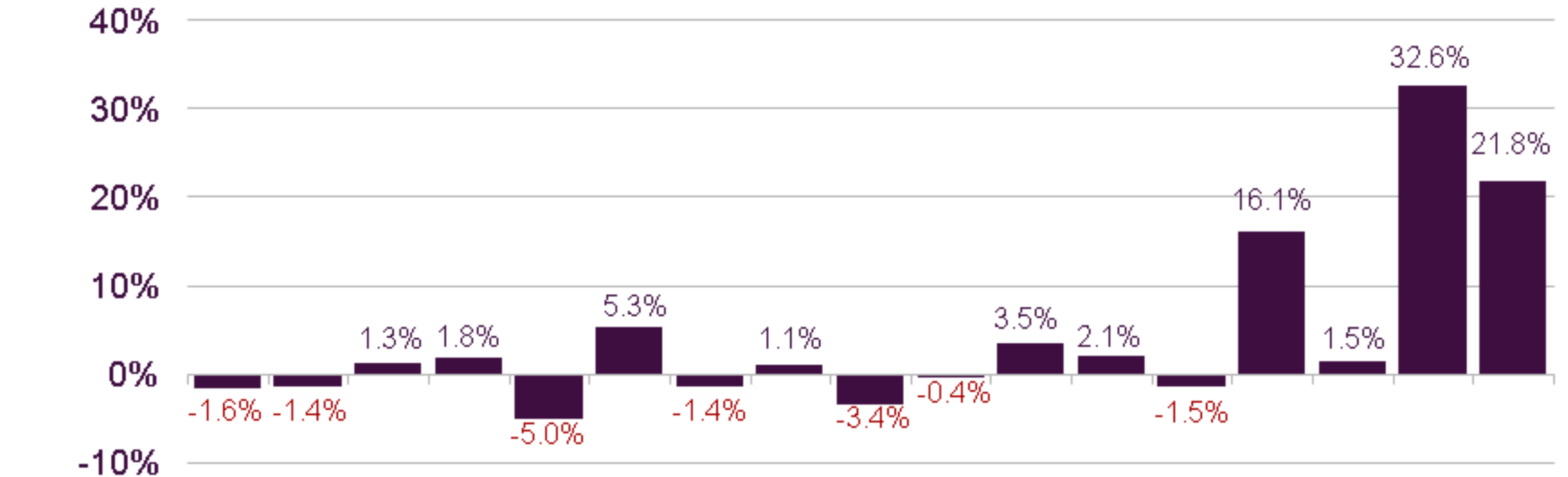
Radio industry revenue annualised growth, 2005-2009

2009 on 2008
1 year change

-7.1% -4.3% +1.9% -5.1% -15.7% -6.6% -3.9% -5.7% -17.5% -4.8% -1.7% -13.3% -22.9% +12.3% -35.7% +18.2% +7.2%

UK FRA GER ITA USA CAN JPN AUS ESP NED SWE IRL POL BRA RUS IND CHN

Average annualised
growth rate 2005-2009



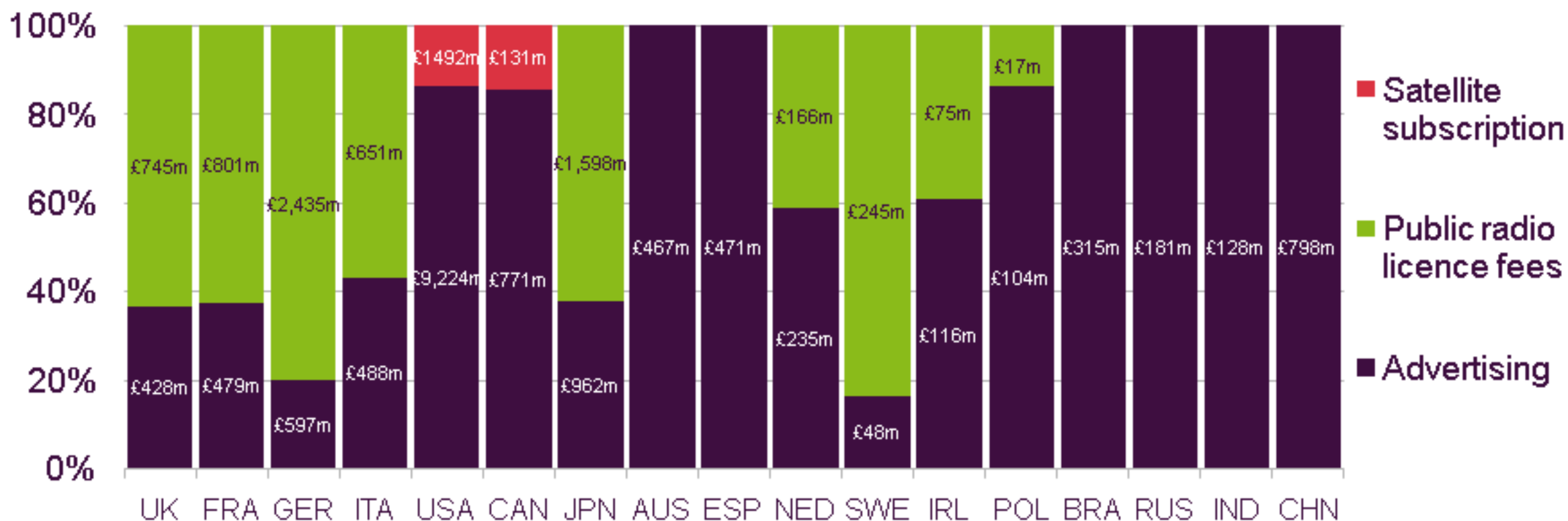
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Note: Ofcom has used an exchange rate of \$1.5643 to the GBP, representing the IMF average for 2009.

Figure 4.11

Proportion of radio industry revenue by source, 2009

Proportion of total revenue (%)



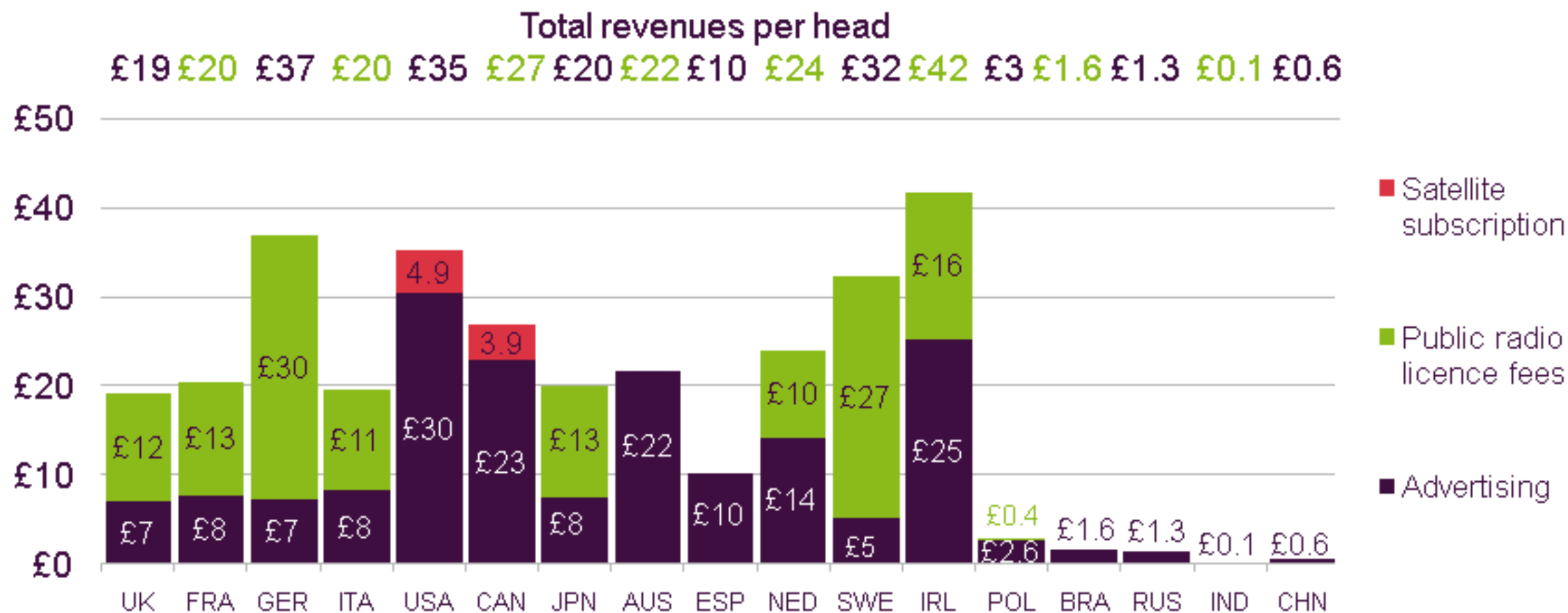
Source: Ofcom analysis based on data taken from PricewaterhouseCoopers Global Entertainment and Media Outlook 2010-2014 @ www.pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility.

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Figure 4.12

Radio industry revenues per head, 2009

Industry revenues per capita (£ per head)

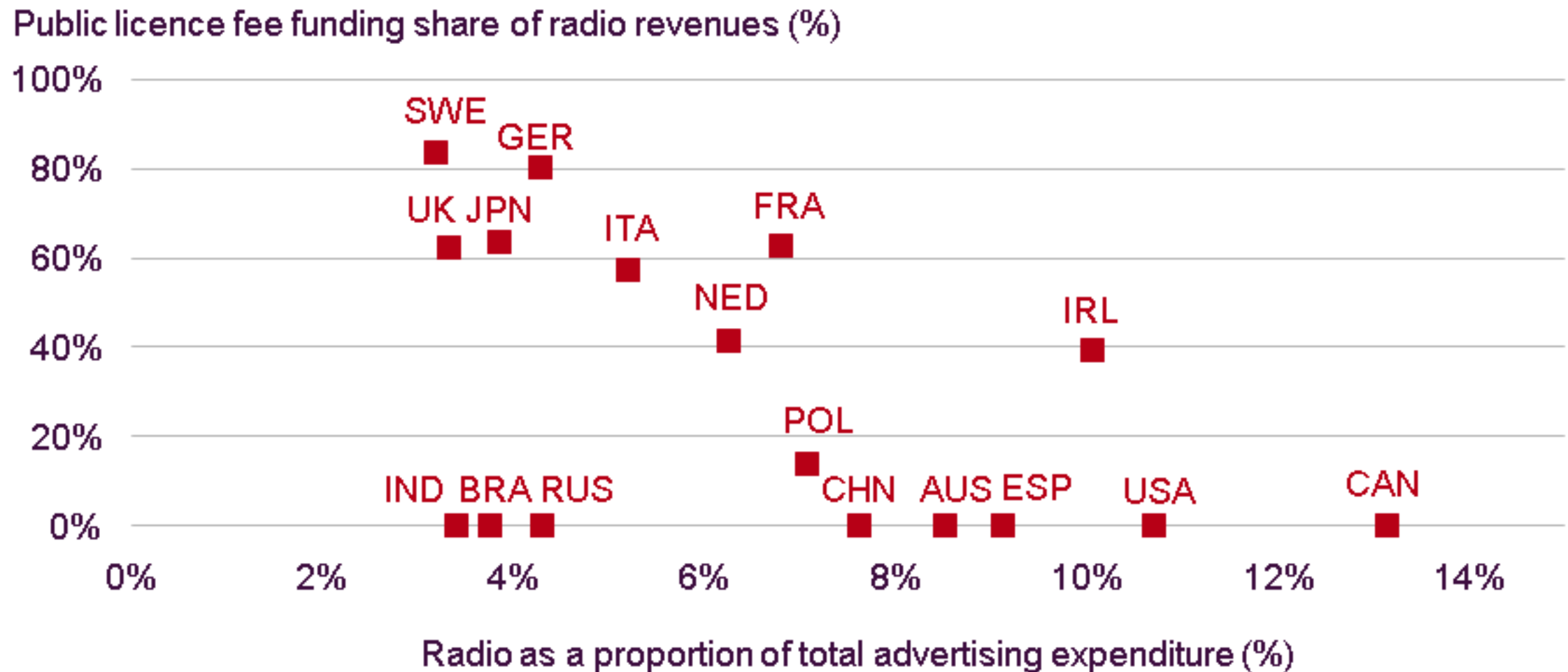


Source: Ofcom analysis based on data taken from PricewaterhouseCoopers Global Entertainment and Media Outlook 2010-2014.

Note: Ofcom has used an exchange rate of \$1.5643 to the pound, representing the IMF average for 2009. Manipulation and interpretation of data is solely Ofcom's responsibility. Figures in this chart are rounded. Population figures used in this calculation can be found in the country profiles.

Figure 4.13

Radio advertising as a proportion of total advertising spend 2009 and licence fee as a share of all radio funding



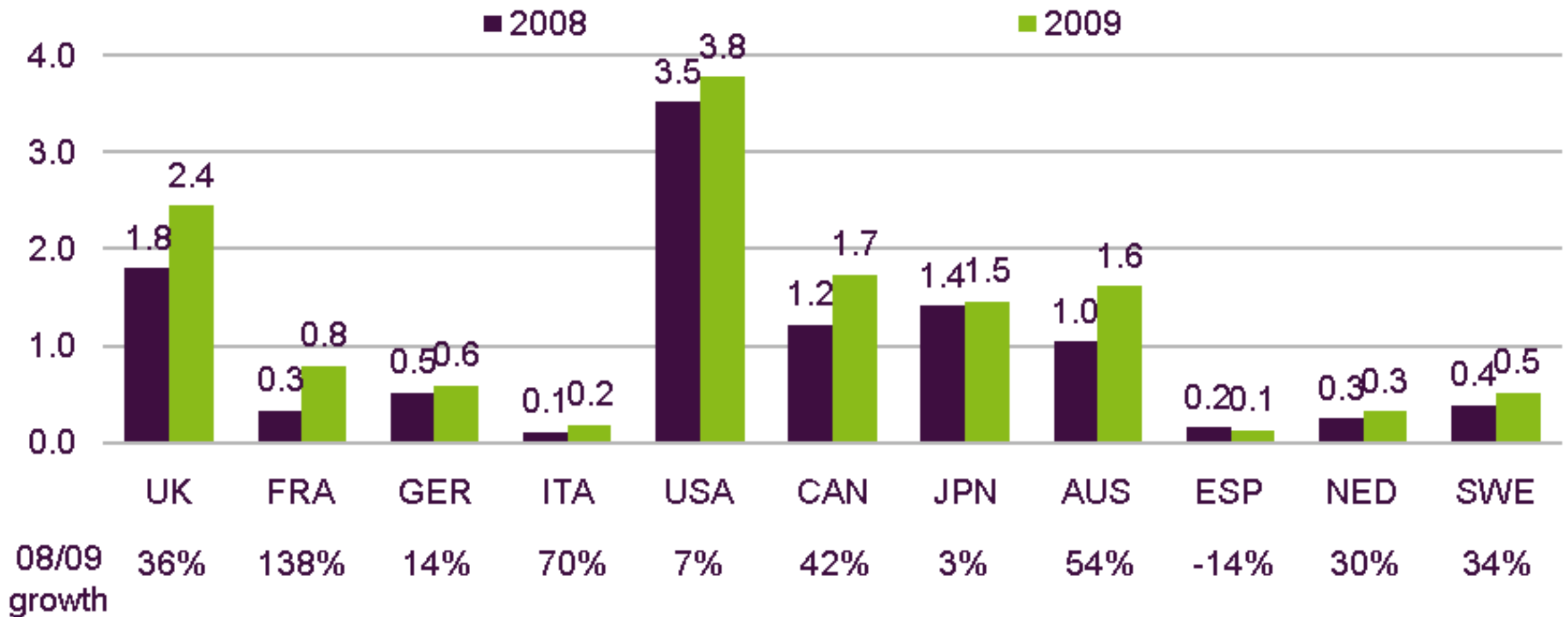
Source: Radio as a proportion of total advertising spend sourced from Warc (www.warc.com). Public licence fee funding share of radio revenues is Ofcom analysis based on data taken from PricewaterhouseCoopers Global Entertainment and Media Outlook 2010-2014.

Note: Ofcom has used an exchange rate of \$1.5643 to the pound. Interpretation and manipulation of data is solely Ofcom's responsibility. Figures in this chart are rounded.

Figure 4.14

Digital music sales

Online and mobile music single track sales per capita (units)

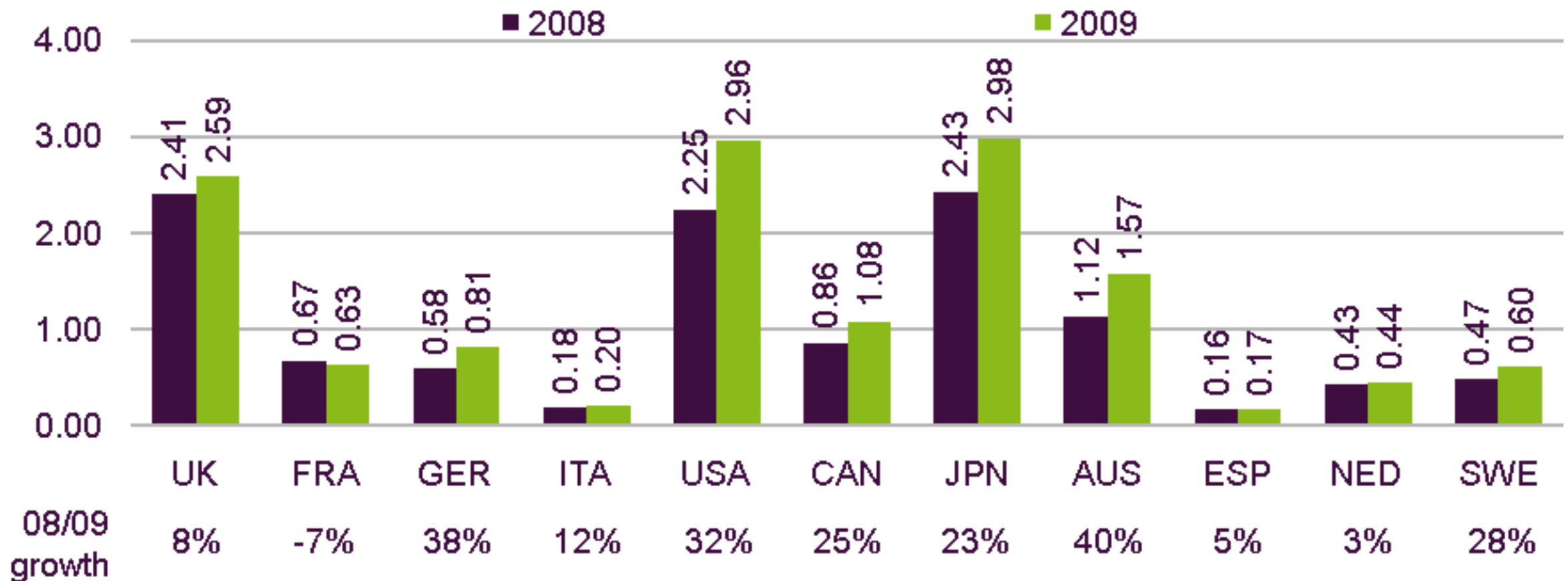


Source: Ofcom calculations based on IFPI data, 'Recording Industry in Numbers' report.

Figure 4.15

Digital music revenues

Digital music revenue per capita (£)

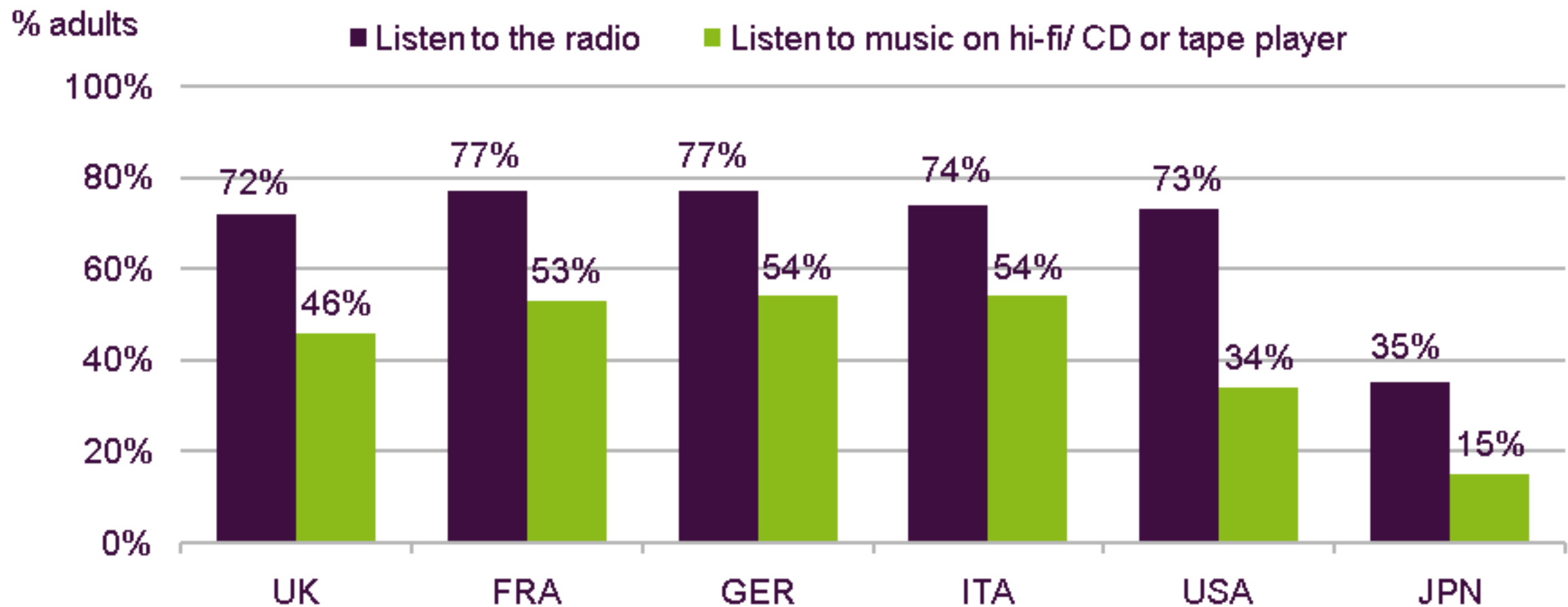


Source: Ofcom calculations based on IFPI data, 'Recording Industry in Numbers' report.

Note: Digital music revenue includes revenue from online single tracks, online albums and mobile single tracks except GER, USA, CAN, NED (online single track and online album only) and JPN (online single track and mobile single track only). Excludes streaming revenue.

Figure 4.16

Adults regularly listening to the radio / music on a hi-fi



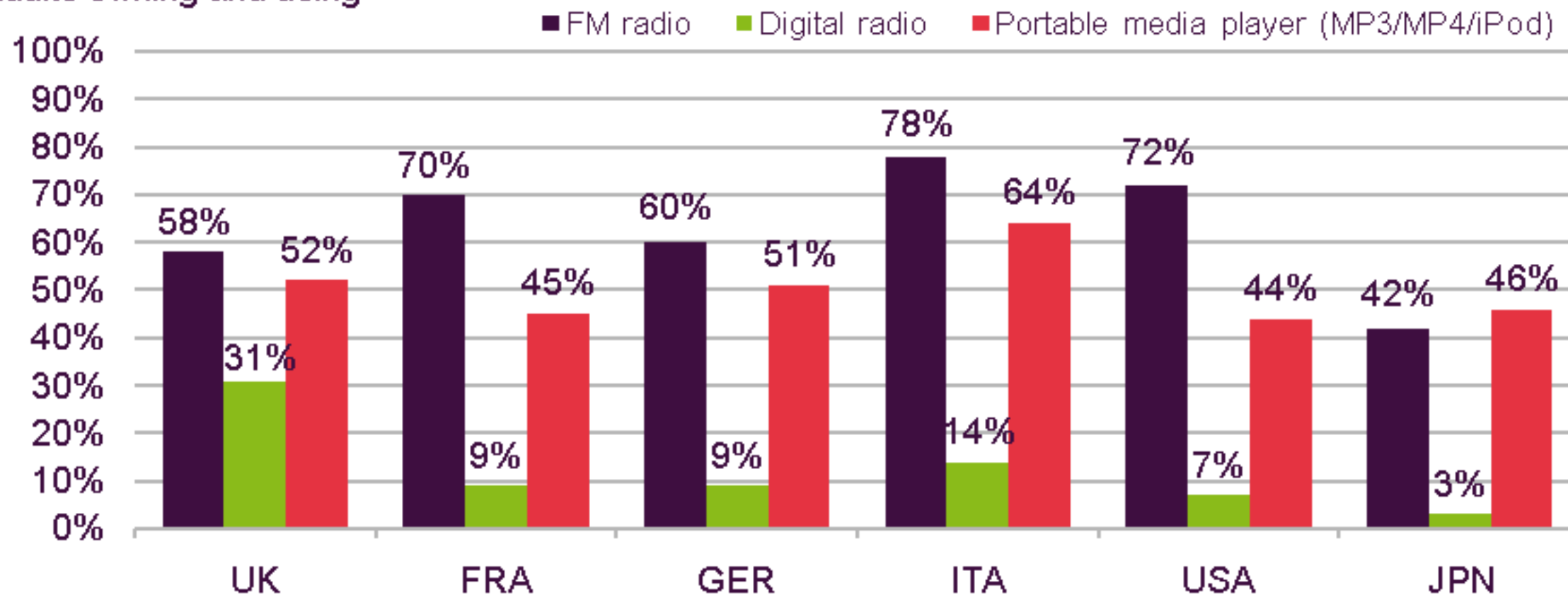
Source: Ofcom research, October 2010. Base sizes (all adults who use the internet): UK=1016, France=1017, Germany=1014, Italy=1002, USA=1017, Japan=1001.

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

Figure 4.17

Adults owning and personally using: FM radio, digital radio, portable media player (MP3/MP4/iPod)

% adults owning and using

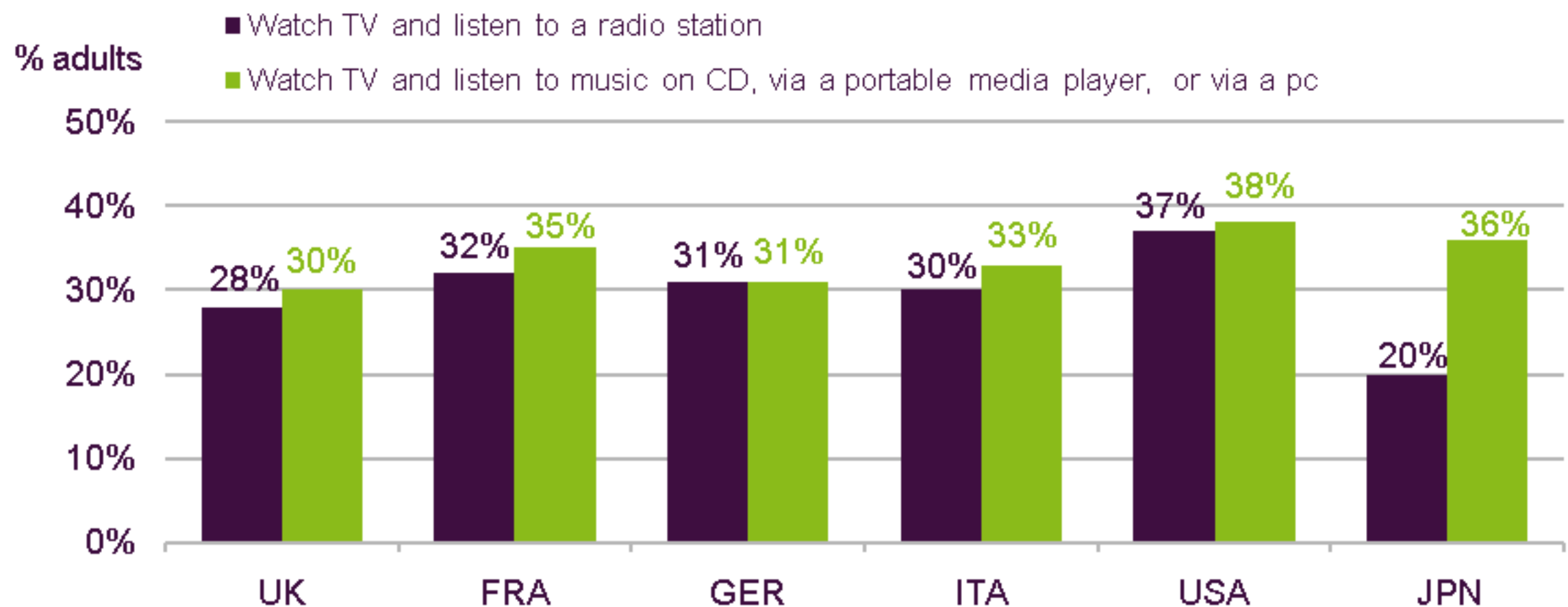


Source: Ofcom research, October 2010. Base sizes (all adults who use the internet): UK=1016, France=1017, Germany=1014, Italy=1002, USA=1017, Japan=1001.

Question: Which of the following do you own and personally use? FM radio, digital radio, portable media player (MP3/MP4/iPod).

Figure 4.18

Do you ever watch TV and listen to a radio station / listen to music at the same time?



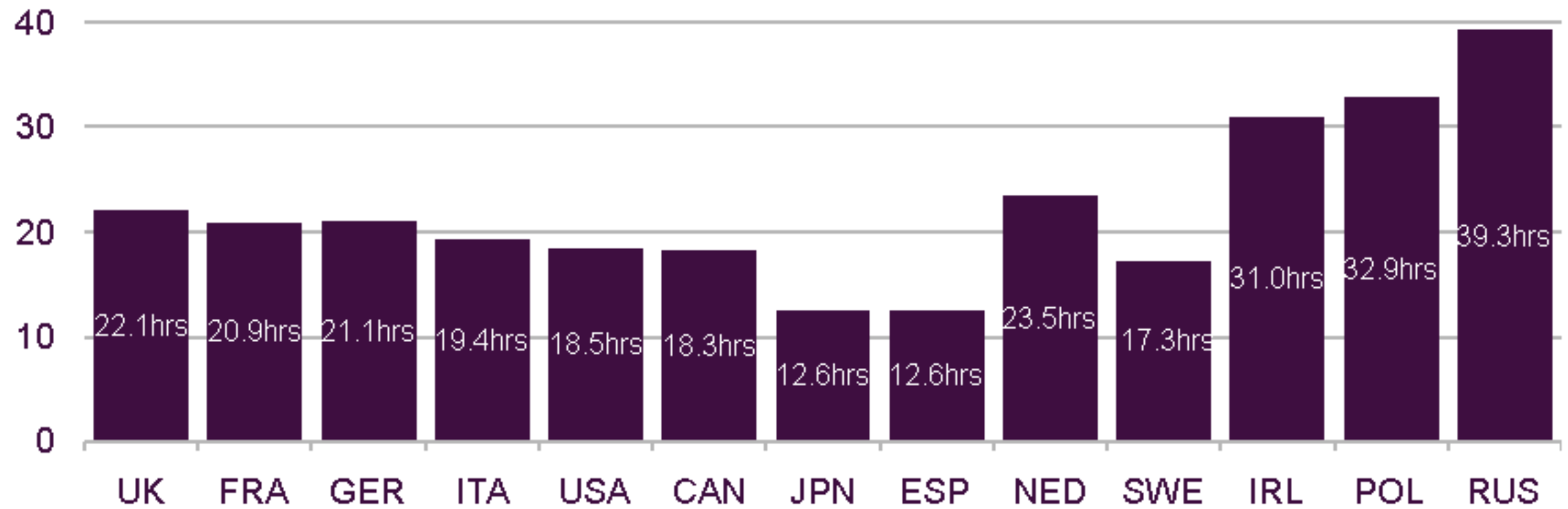
Source: Ofcom research, October 2010. Base sizes (all adults who use the internet): UK=1016, France=1017, Germany=1014, Italy=1002, USA=1017, Japan=1001.

Question: Do you ever watch TV at home and do these other things: listen to a radio station or music on CD, an MP3 player / iPod, or through your computer, (at least sometimes)?

Figure 4.19

Weekly listening hours 2009

Average hours per head



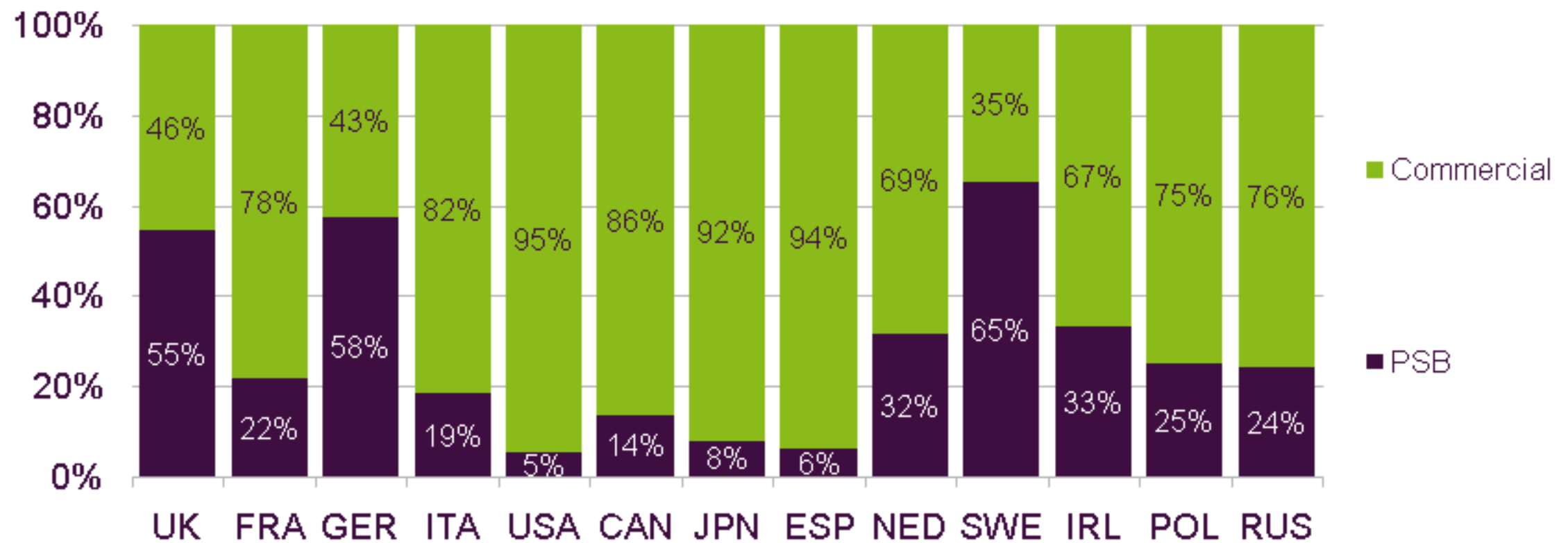
Source: EBU, Ofcom, 2009

Note: Age ranges covered vary across countries

Figure 4.20

Share of PSB radio listening, 2009

Audience share (%)



Source: EBU, Ofcom, 2009