

3 Radio and audio content

3.1 Recent developments in Northern Ireland

New UK-wide digital stations go live in Northern Ireland

A second UK-wide commercial digital radio multiplex, broadcasting 18 digital stations (including 14 new ones) launched in March 2016.

The new digital radio multiplex is run by Sound Digital, a consortium of Arqiva, Bauer, and Wireless Group (formerly UTV Media GB). The multiplex (which is the transmission infrastructure used to deliver these services) carries new stations including Virgin Radio, talkRADIO, talkSPORT 2 and Share Radio.

Coverage from the new multiplex is more limited than from others, comprising BBC services; Digital One; and local DAB. UK-wide indoor coverage currently reaches 76.5% of households. In Northern Ireland, the figure will be 56.6%.

3.2 Radio station availability

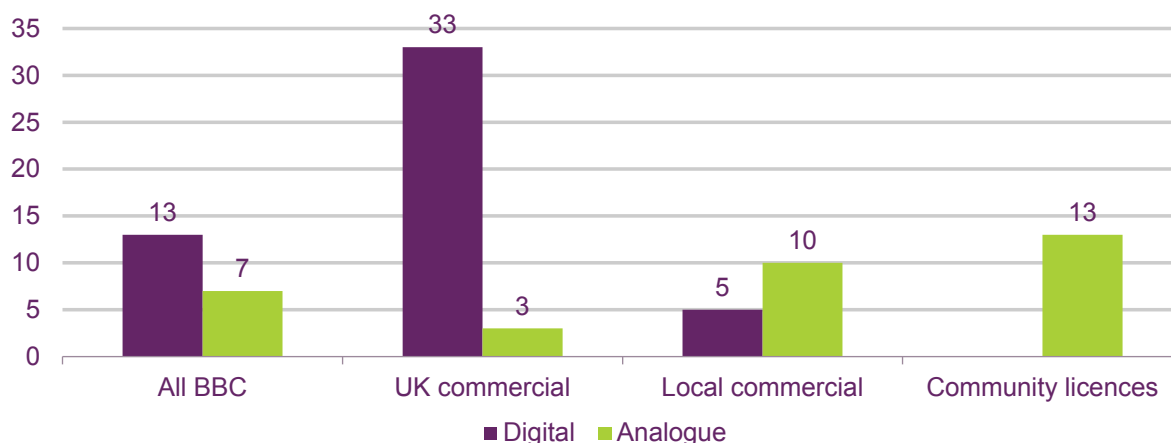
There are now 51 stations broadcasting on DAB in Northern Ireland

With the launch of the Sound Digital multiplex, there are now 51 stations available on DAB in Northern Ireland. The second UK-wide multiplex brings an additional 18 stations, adding to the 13 digital services available from the BBC, the 12 stations on the Digital One multiplex and the eight commercial stations on the local DAB multiplex.

However, not all of these stations will be available on DAB to listeners across all of Northern Ireland. As Figure 3.2 shows, the proportion of households within the coverage area for each DAB transmitter network (operated by the BBC, Digital One and Sound Digital Ltd) varies.

There are also 33 analogue stations available in Northern Ireland. Many of these are simulcasts of DAB stations, but the 13 community radio services and some of the local commercial radio services are available on analogue only in their localised coverage areas.

Figure 3.1 Radio station availability



Source: Ofcom, May 2016

Note: This chart shows the maximum number of stations available; local variations and reception issues mean that listeners may not be able to access all of them. Local commercial analogue includes seven separate stations broadcasting in different locations across Northern Ireland as the Q Network.

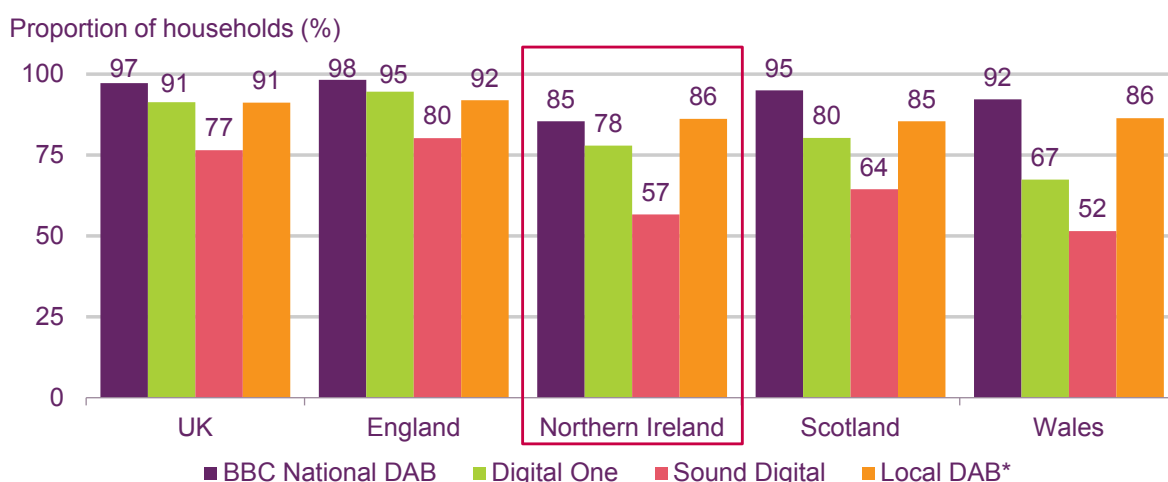
3.3 DAB coverage

DAB services from the BBC and commercial broadcasters are available to a majority of households

Digital One, the UK-wide commercial multiplex which launched in Northern Ireland in 2013, now reaches 78% of households. The Sound Digital multiplex, which launched earlier this year, is currently available to 57% of households. The BBC's DAB digital radio services are available to 85% of households in Northern Ireland.

Coverage from the local DAB multiplexes in Northern Ireland, as well as across the UK, is currently being extended with the addition of new transmitter sites. By autumn 2016, the expected coverage of local DAB in Northern Ireland is 86% of households. This will be a 7pp increase compared to coverage in 2015.

Figure 3.2 Household coverage of DAB



Source: BBC, Arqiva, Ofcom, May 2016. *Figures for local DAB are projections of expected coverage for Autumn 2016 based upon a planned list of transmitter sites. The plan is continuing to be refined and actual coverage may differ slightly from those figures when the current programme of expansion completes.

3.4 Listening to audio content

Fewer people in Northern Ireland than the UK average listen to the radio

The proportion of the adult population who listen to radio in Northern Ireland was lower than the UK average in 2015, although radio still reached 86.6% of people in Northern Ireland. The average time spent listening in an average week in 2015 was 20.2 hours, again lower than the UK average. This is lower than in 2014, when people in Northern Ireland spent 21.6 hours on an average week listening to radio.

Figure 3.3 Average weekly reach and listening hours: 2015

| | England | Scotland | Wales | Northern Ireland | UK TOTAL |
|--------------------------|------------|------------|------------|------------------|------------|
| Average weekly listening | 21.4 hours | 21.1 hours | 22.1 hours | 20.2 hours | 21.4 hours |
| Reach | 89.6% | 87.9% | 93.6% | 86.6% | 89.6% |

Source: RAJAR, All adults (15+), year ended Q4 2015. Reach is defined as a percentage of the area adult population who listen to a station for at least five minutes in the course of an average week.

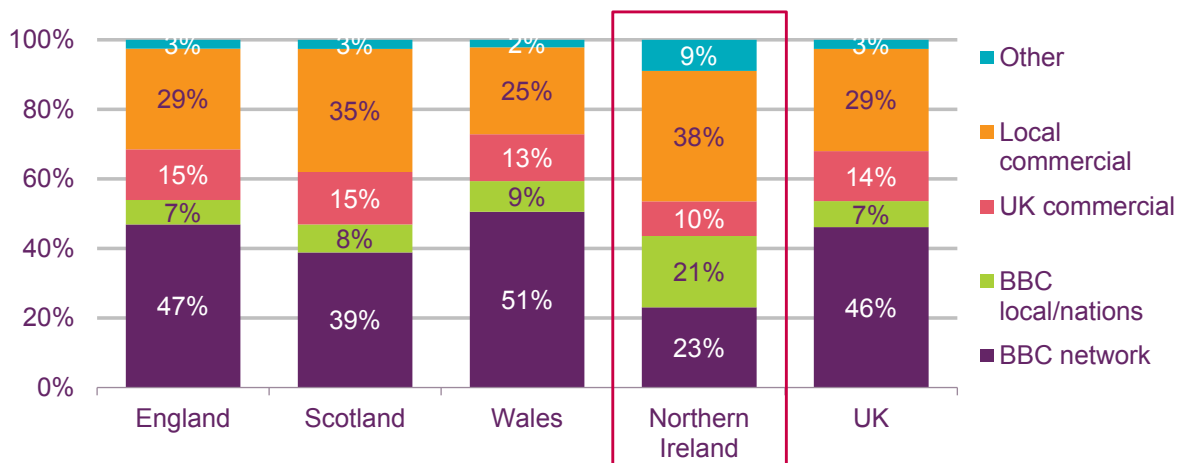
Local radio is the most listened-to type of radio in Northern Ireland

The share of listening hours to local and nations’ services in Northern Ireland is far higher than the UK average, and higher than in any other UK nation. Together, local commercial and the BBC nations’ services (Radio Ulster and Radio Foyle) accounted for 59% of total listening hours in 2015. Local commercial stations take the largest share of listening hours (38%) in Northern Ireland, 9pp higher than the UK average. The nations’ BBC services have a 21% share of listening hours. This is three times higher than the UK average for BBC local and nations’ radio services.

Commercial radio’s share of listening overall is high in Northern Ireland. This is due to the high share of local commercial stations; listening to UK-wide commercial stations is slightly lower than the UK average. The share of listening to BBC network stations is half that of the UK overall, accounting for less than a quarter of listening.

Northern Ireland also has the highest proportion of listening to ‘other’ (9%). This is thought to be mostly cross-border listening to overspill stations from the Republic of Ireland.

Figure 3.4 Share of listening hours, by nation: 2015



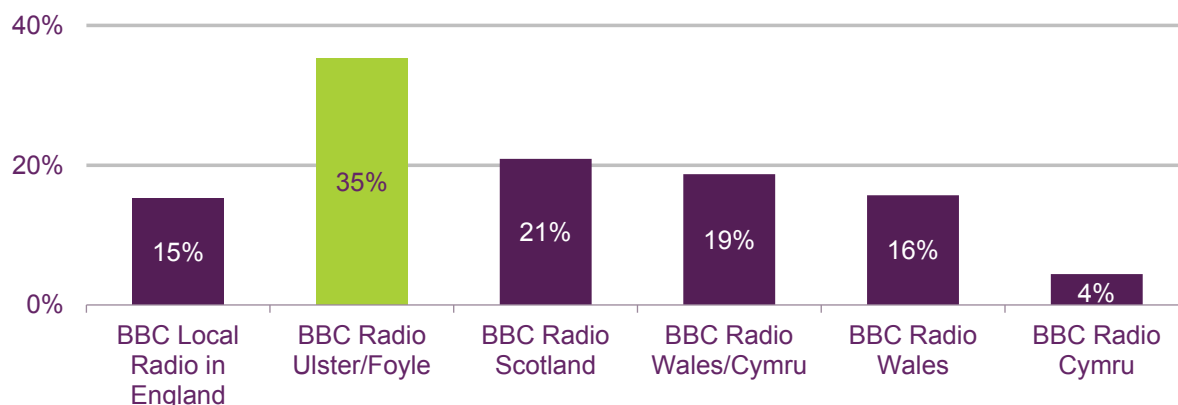
Source: RAJAR, All adults (15+), year ended Q4 2015

Northern Ireland has the highest reach of all the BBC nations’ services

In an average week in 2015, BBC Radio Ulster/Foyle reached 35% of adults in Northern Ireland. This is by far the highest weekly reach of any other BBC nations’ service, and 20pp

higher than the aggregated reach of the BBC local radio stations in England⁶. The high reach of this service is reflected in the fact that the BBC local/nations' services also have the largest share of listening hours in Northern Ireland, when compared to the UK average or any other nation.

Figure 3.5 Weekly reach for nations'/local BBC services: 2015



Source: RAJAR, All adults (15+), year ended Q4 2015

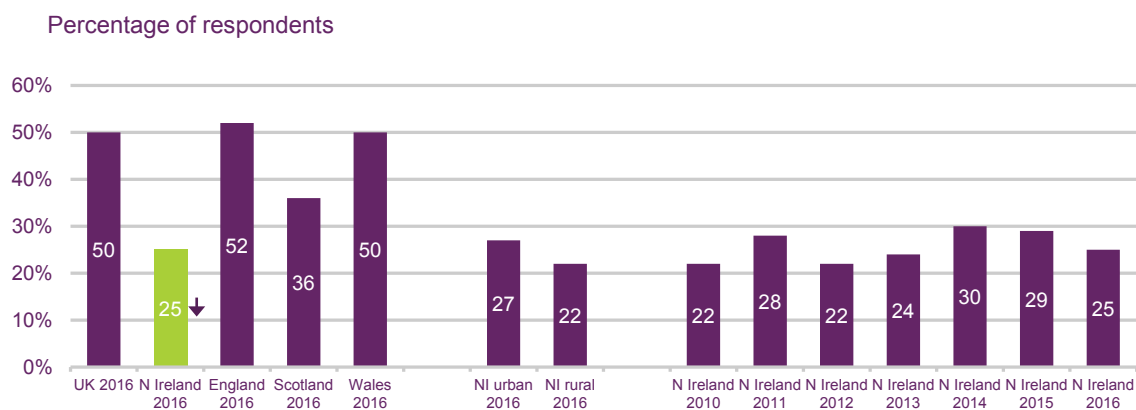
3.5 Digital radio set ownership and listening

Ownership of DAB digital radio sets is lower in Northern Ireland than in the UK as a whole

Twenty-five per cent of adults in Northern Ireland who listen to radio said they had at least one DAB radio set at home, in line with findings from 2015. Ownership of DAB digital radios among radio listeners in Northern Ireland remains much lower than the UK average (50%). Ownership did not differ greatly between radio listeners in urban and rural areas.

⁶ In the 12 months to Q4 2015, BBC Radio Guernsey was the only individual BBC local service with a higher reach than BBC Radio Ulster in the area where it broadcasts (38.8%).

Figure 3.6 Ownership of DAB digital radios



Source: Ofcom Technology Tracker, H1 2016

Base: Adults aged 16+ who listen to radio (n = 2832 UK, 356 Northern Ireland, 1693 England, 384 Scotland, 399 Wales, 188 Northern Ireland urban, 168 Northern Ireland rural, 653 Northern Ireland 2010, 428 Northern Ireland 2011, 404 Northern Ireland 2012, 405 Northern Ireland 2013, 404 Northern Ireland 2014, 407 Northern Ireland 2015, 356 Northern Ireland 2016)

NB. Data in 2011 based on those who listen to radio and have any radio sets in the household that someone listens to in most weeks

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Northern Ireland and UK in 2016, between Northern Ireland urban and rural in 2016 and between Northern Ireland 2015 and 2016. Circles around the +/- figures above the chart indicate any significant difference between 2015 and 2016 for Northern Ireland, urban and rural.

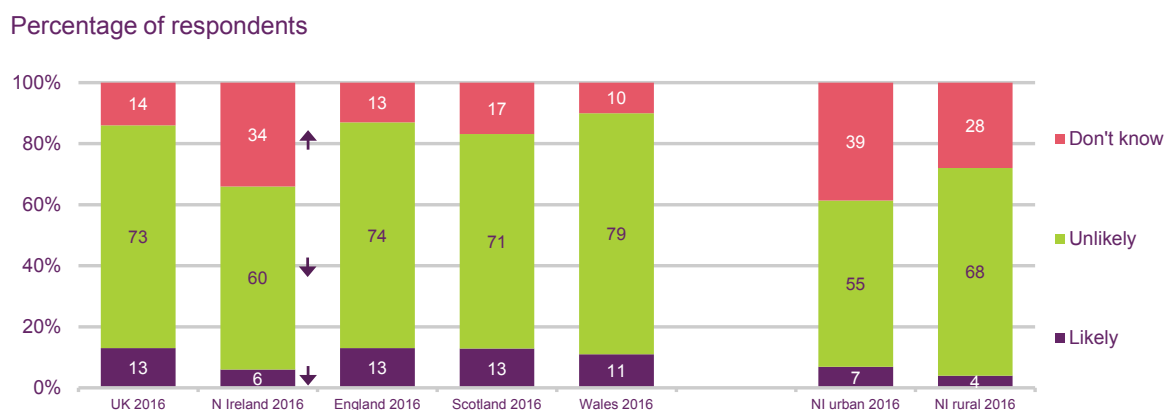
QP9: How many DAB sets do you have in your household?

Six per cent of radio listeners in Northern Ireland without a DAB set say they are likely to get one within the next year

Less than one in ten (6%) radio listeners in Northern Ireland who do not have a DAB set said they were likely to get one in the next 12 months, this was lower than the UK average (13%).

In 2016 there was no difference in the claimed likelihood of buying a DAB set by urban or rural location in Northern Ireland.

Figure 3.7 Likelihood of purchasing a DAB radio within the next year



Source: Ofcom Technology Tracker, H1 2016

Base: Adults aged 16+ who listen to radio and do not have a DAB set (n = 1593 UK, 275 Northern Ireland, 870 England, 236 Scotland, 212 Wales, 138 Northern Ireland urban, 137 Northern Ireland rural).

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Northern Ireland and UK in 2016 and between Northern Ireland urban and rural in 2016.

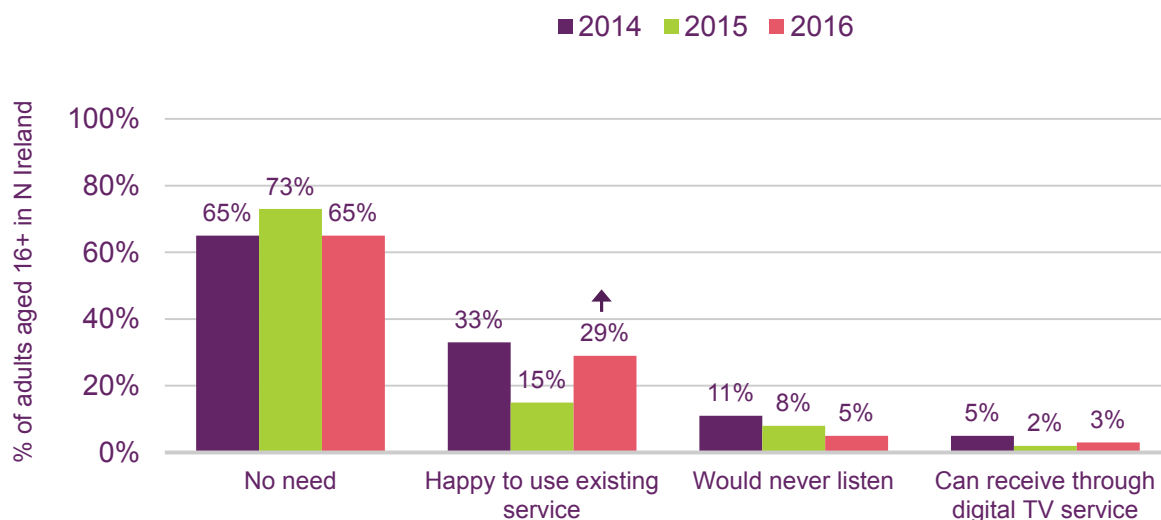
QP12: How likely is it that your household will get a DAB radio in the next 12 months?

Around two thirds of radio listeners in Northern Ireland without a DAB set are unlikely to get one in the next 12 months, as they feel they have no need

Non-DAB-owning radio listeners who said they were unlikely to get DAB radio in the next 12 months were asked to say – without prompting - why they were unlikely to do so. Around two-thirds (65%) said it was because they did not have a need for it. Three in ten (29%) said it was because they were happy using an existing service; a significant increase of 14 percentage points since 2015.

Less than one in ten said it was because they would never listen to it (5%), or because they could receive digital radio through their digital TV service (3%).

Figure 3.8 Reasons why unlikely to purchase DAB in the next year



Source: Ofcom Technology Tracker, H1 2016

Base: All adults aged 16+ who listen to radio and are unlikely to get DAB radio in the next 12 months (Northern Ireland 2014 = 204; Northern Ireland 2015 = 113; Northern Ireland 2016 = 177)

Responses shown for spontaneous mentions by 5% or more at a UK level

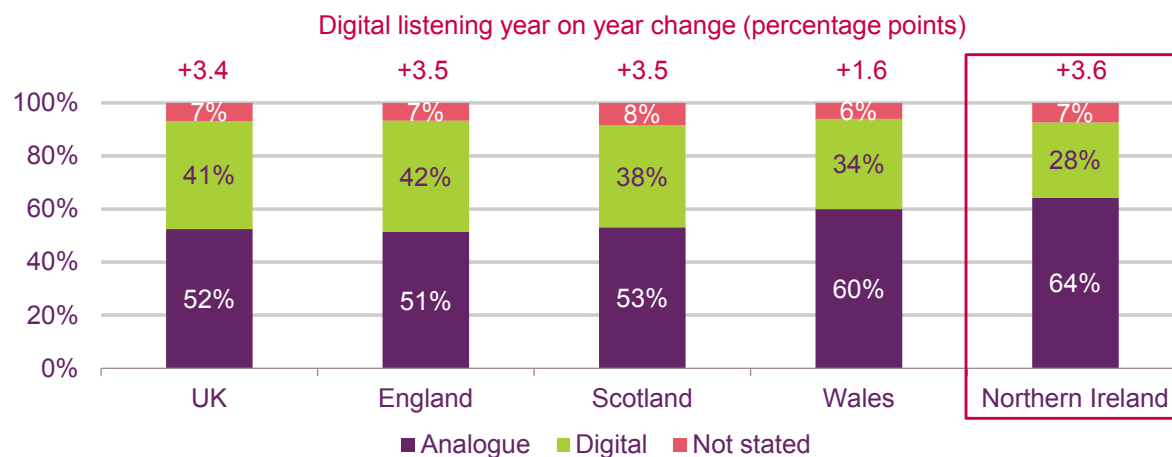
Significance testing: Arrows indicate any significant differences at the 95% confidence level between Northern Ireland 2015 and 2016.

QJ14: Why are you unlikely to get digital radio in the next 12 months?

Digital share of listening is growing, but still lags behind the UK average

Listening to radio services through all digital platforms⁷ now accounts for 28% of total listening hours in Northern Ireland, 13pp lower than the UK average. Although this is the lowest share of listening in any UK nation, growth in digital's share was slightly higher in Northern Ireland (3.6pp), than in the UK as a whole (3.4pp).

Figure 3.9 Share of listening hours via digital and analogue platforms: 2015



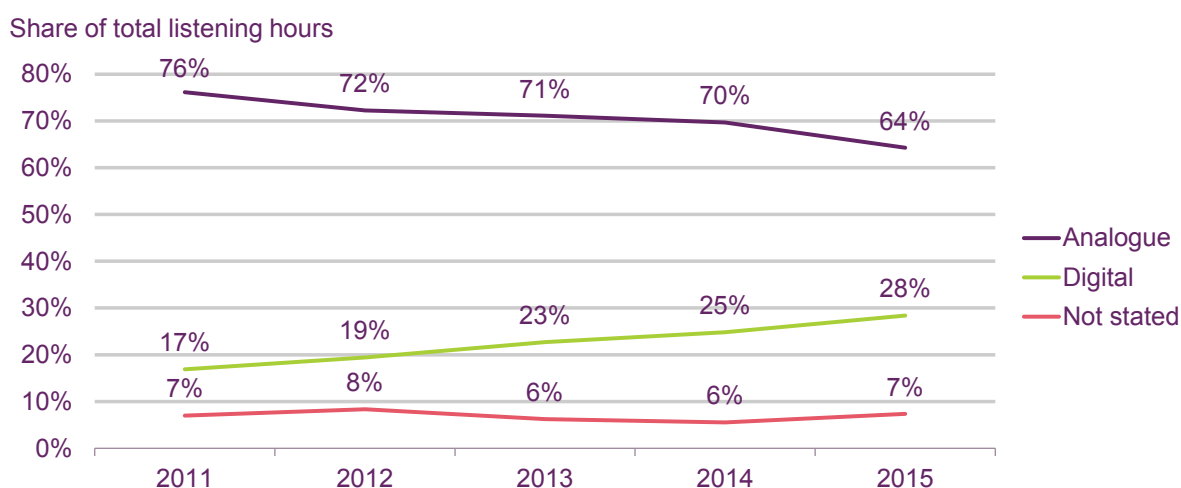
Source: RAJAR, All adults (15+), year ended Q4 2015

⁷ DAB, digital television and the internet.

Analogue share of listening fell by 6pp in 2015

Almost two-thirds of radio listening in Northern Ireland is to analogue services, compared to just over half for the UK as a whole. However, the proportion of time spent listening through analogue platforms fell by 6pp year on year in Northern Ireland, a steeper decline than in previous years. Digital listening increased by 3.6pp year on year, more than the 2.1pp seen in 2014. This is partly due to an increase in digital listening hours since the launch (in Northern Ireland only) of Bauer's digital-only station, Downtown Country, in April 2015, and also because BBC Radio Foyle is now available on DAB, but it is also due to a fall in total listening hours overall in Northern Ireland.

Figure 3.10 Share of listening hours via digital and analogue platforms in Northern Ireland: 2011-2015



Source: RAJAR, all adults, calendar years 2011-2015

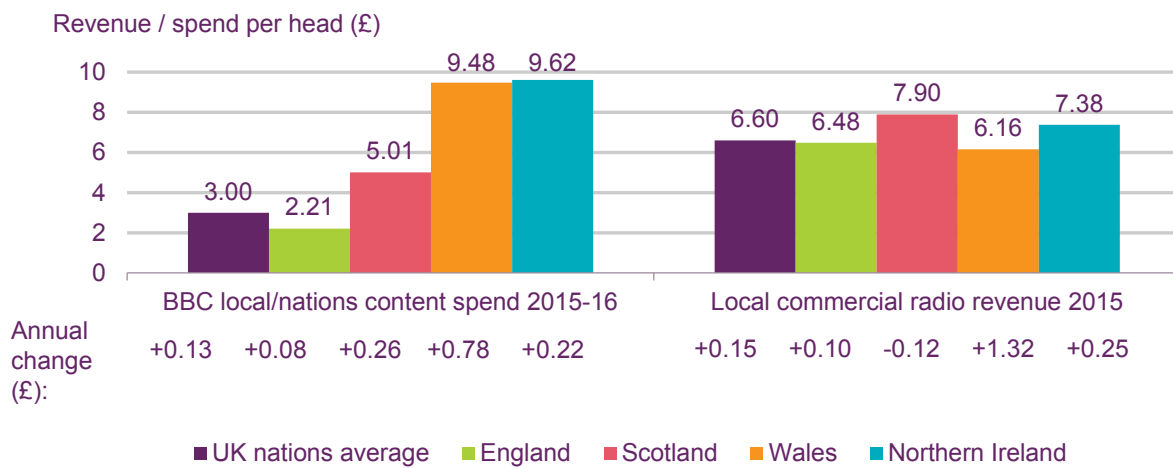
3.6 The radio industry

Local commercial radio revenue per head of population in Northern Ireland is above the UK average

Local commercial radio revenue in Northern Ireland grew by 25p per head of population in 2015 to £7.38. This is higher than the UK average, and the second highest revenue per head across all of the UK nations. Local commercial radio revenue was at its highest level since 2008, increasing by 4.3% to £13.6m.

Spend on radio content for BBC Radio Ulster and Radio Foyle also increased in 2015-16, up by 2.3% to £9.62 per head. On a per-capita basis, spend on BBC local/nations' services was highest in Northern Ireland.

Figure 3.11 Local/nations' radio spend and revenue per head of population: 2015



Source: Broadcasters

Note: The UK total shows the average for analogue local commercial radio across the four nations and therefore excludes services broadcast UK-wide. Figures are nominal.