

3 Radio and audio content

3.1 Radio service availability

In Northern Ireland digital radio listeners can access up to 22 DAB stations, including the 11 national BBC stations plus BBC Radio Ulster/ Foyle and three of the UK's national commercial stations (Classic FM, talkSPORT, and UCB). An additional six stations are available through the local DAB multiplex in Northern Ireland, including simulcasts of local commercial stations: Downtown Radio, Cool FM, Q102.9 FM and Citybeat, as well as two music-based stations, Magic and Heat. This multiplex provides services to around 75% of households in the editorial area³. For further information on how DAB coverage may improve in the future, see Ofcom's DAB planning consultation, published in June 2011⁴.

Figure 3.1 Commercial DAB multiplex coverage map for Northern Ireland



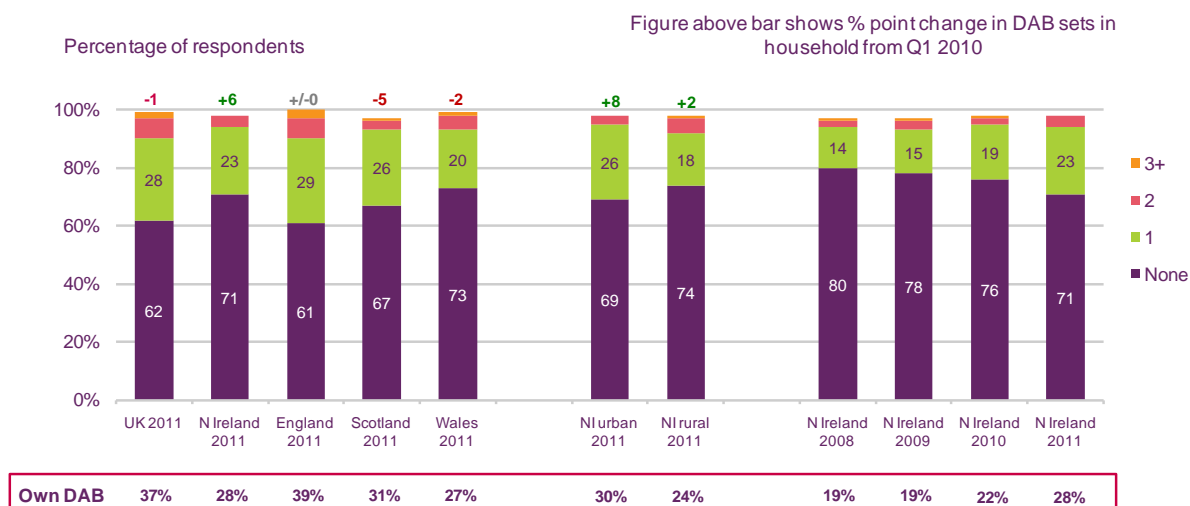
³ http://stakeholders.ofcom.org.uk/binaries/consultations/dab-coverage-planning/AnnexB/DSO_12D_Northern_Ireland_DA1.pdf

⁴ <http://stakeholders.ofcom.org.uk/consultations/dab-coverage-planning/>

3.2 Digital radio set ownership

Almost three in ten adults in Northern Ireland who listen to the radio claim they have a DAB radio set at home (28%). This represents a six percentage point rise on 2010 – the largest increase across the nations. DAB ownership is still significantly lower than the UK average of 37%.

Figure 3.2 Ownership of DAB digital radios



Source: Ofcom research, Q1 2011

Base: Adults aged 16+ who listen to radio (n = 2811 UK, 428 Northern Ireland, 1629 England, 357 Scotland, 397 Wales, 212 Northern Ireland urban, 216 Northern Ireland rural, 539 Northern Ireland 2008, 569 Northern Ireland 2009, 653 Northern Ireland 2010, 428 Northern Ireland 2011)
 Q4. You said earlier that you have (NUMBER) radio sets in your home that someone in the household listens to in most weeks. How many of these radio sets are digital radios?

Among radio listeners in Northern Ireland who do not have a DAB radio set, 16% say that it is likely that they will purchase a DAB set in the next year⁵, compared to 21% across the UK.

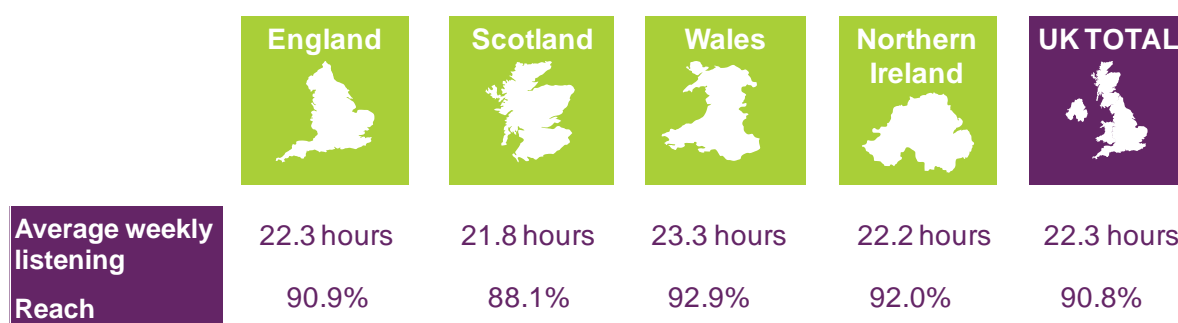
3.3 Patterns of listening to audio content

Radio reach in Northern Ireland is higher than the UK average

Among adults in Northern Ireland, average weekly radio listening in the year ending Q1 2011 stood at 22.2 hours and average weekly reach at 92%. While weekly hours of listening were marginally lower than the UK average (22.3 hours), reach was higher (the UK-wide figure was 90.8%) suggesting that, compared to the UK average, a greater proportion of people in Northern Ireland listen to radio, but for shorter periods.

⁵ This finding should be treated with caution, as respondents' stated purchase intentions in survey research are often unreliable.

Figure 3.3 Average weekly reach and listening hours – year to Q1 2011

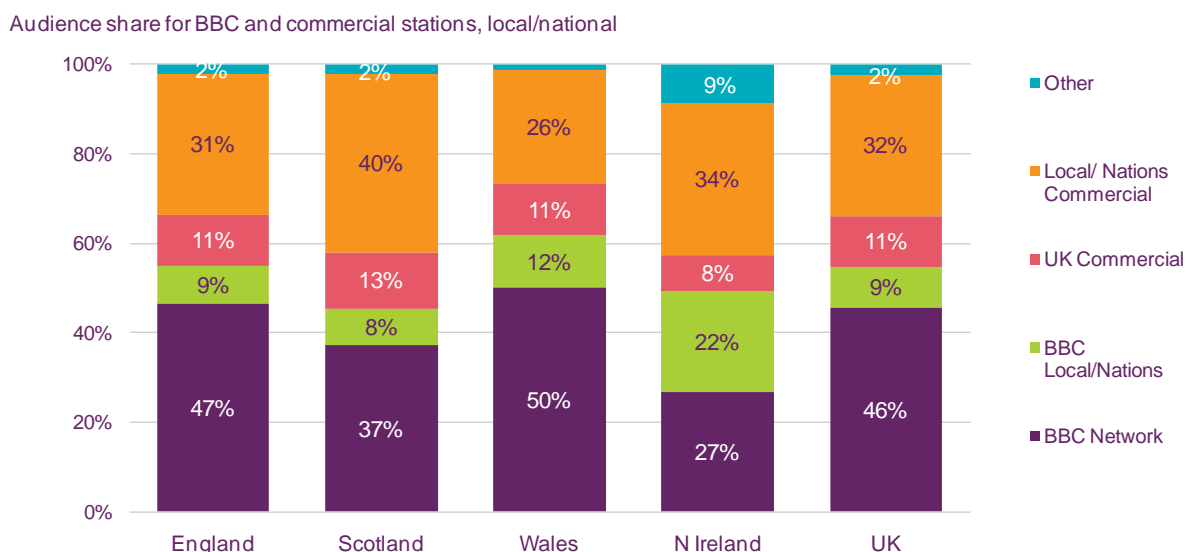


Source: RAJAR, All adults (15+), year ended Q1 2011. Reach is defined as the total proportion of the respective adult population who listened to at least five consecutive minutes in the average week.

BBC Local/national stations are relatively popular among people in Northern Ireland

In the year ending Q1 2011, BBC Local/nations stations attracted a 22% share of radio listening hours in Northern Ireland, significantly higher than across the other nations (the UK average was 9%). This is consistent with findings in previous years and is explained by the relatively high share of Radio Ulster/ Foyle. Conversely, the BBC’s networked services attracted a market share of 27%, much lower than in any of the other nations (the UK average share was 46%). The share of other stations, which includes small community and commercial stations, was 9% - higher than the rest of the UK (where the average was 2%).

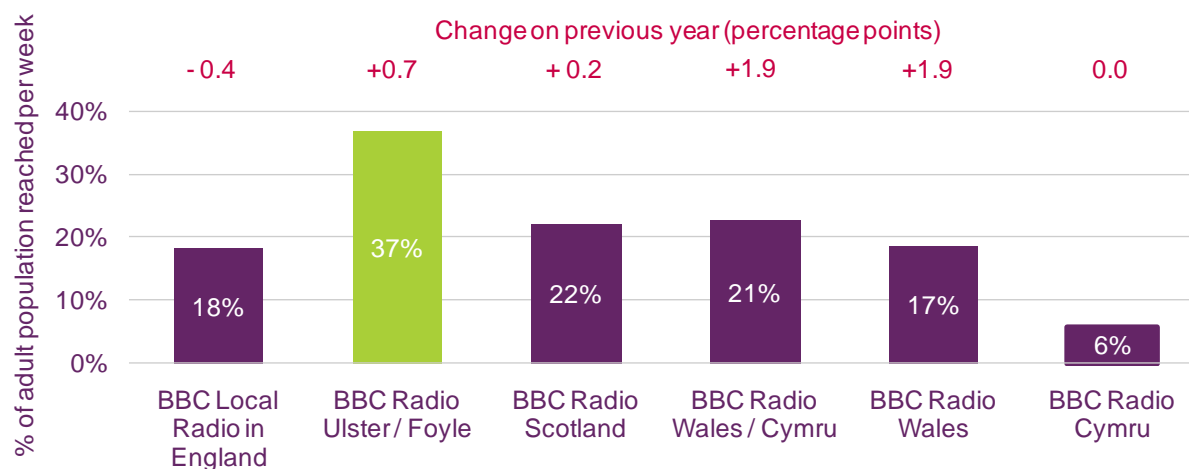
Figure 3.4 Share of listening hours, by nation: year to Q1 2011



Source: RAJAR, All adults (15+), year ended Q1 2011

Just over a third of adults (37%) listened to BBC Ulster/ Foyle in an average week in Q1 2011 (Figure 3.5). The figure rose year on year by 0.7 percentage points, and remains the highest reach of the BBC’s national services, and higher than the average local BBC radio audience in England.

Figure 3.5 Weekly reach for national/ local BBC services



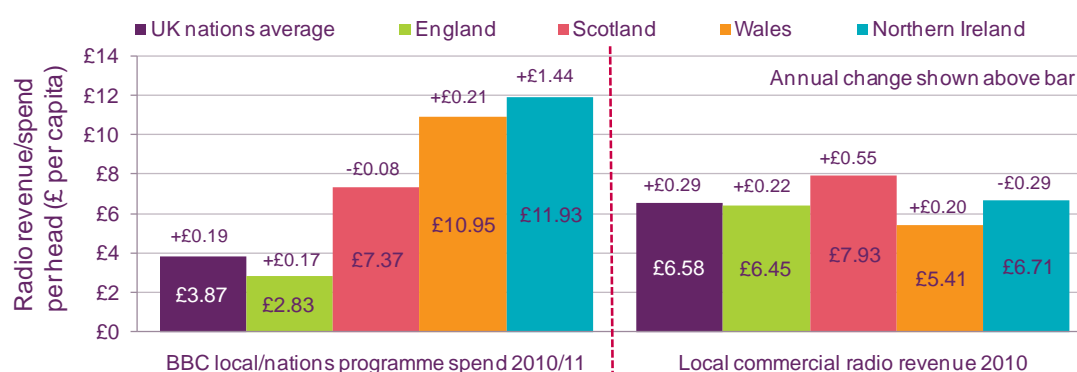
Source: RAJAR, All adults (15+), year ended Q1 2011. Reach is defined as the total proportion of the adult population within each respective TSA who listened to at least five consecutive minutes in the average week.

3.4 The radio industry

We estimate that revenue generated by the commercial stations in Northern Ireland reached £12m in 2010. Adjusting for population size, Northern Ireland has revenue per head of £6.71, a £0.29 decrease on 2009, but above the UK average of £6.58 (which rose by 4% year on year).

BBC Radio spend on BBC Radio Ulster and BBC Radio Foyle totalled £21.6m in 2010/11. Expenditure per head in Northern Ireland is the highest among the UK nations, rising £1.44 on the previous year to £11.93. This is due to the smaller population in Northern Ireland and the added expenditure of running two services.

Figure 3.6 Local/nations radio spend and revenue per head of population 2010/11



Source: Broadcasters, 2010

Note: The UK total shows the average for local commercial radio across the four nations and therefore excludes revenues for the UK-wide commercial stations: Classic FM, talkSPORT, and Absolute. These figures supersede all others and are not directly comparable with historical data.

3.5 Northern Ireland community broadcasting

There are currently ten community radio stations broadcasting in Northern Ireland, with another two due to go on air in 2011.

Belfast-based station Féile FM ceased broadcasting in March 2011 after encountering financial difficulties and the decision was made to surrender the licence, with hopes of applying for a Restricted Service Licence in the future.