# Digital Radio Report
# October 2012

Ofcom's third annual Digital Progress Report – chart pack

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# Basis of report publication

- The Government launched its Digital Radio Action Plan in July 2010. Ofcom was asked in the Action Plan to publish an annual report on the availability and take-up of digital radio services.

- The Action Plan emphasises that digital radio switchover should begin only when the market is ready and that it should be predominantly consumer-led. An aspirational target date of 2015 was supported by the Action Plan. But it also concluded that, when a decision is taken on setting a date for digital radio switchover, it will be the following criteria and not the aspirational timetable which takes precedence:
  - when 50% of all radio listening is via digital platforms; and
  - when national DAB coverage is comparable to FM, and local DAB reaches 90% of the population and all major roads.

- This report includes data on digital radio devices' share of radio listening and information on the coverage project, designed to measure current levels of FM and DAB coverage.

- In this report 'digital radio' is used in its broadest sense to include all platforms and technologies that allow listeners to access digital radio services.

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# Figure 1

## Existing DAB coverage

| Existing DAB coverage | Aggregate of local multiplexes | BBC national | Commercial national (Digital One) |
|---|---|---|---|
| Households | 66.4% | 94.3% | 84.6% |
| Roads | 43.2% | 82.9% | 63.5% |

Source: Ofcom, May 2012
The figures for local DAB coverage are derived from a set of assumptions which have recently been changed following extensive testing. Consequently, the actual coverage of local DAB will be greater than that shown in the table.

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# 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, May 2012
Note: Variable indicates that reception may be less than perfect quality; some artefacts will be present on the audio signal or there may be occasional short drop outs

# Figure 3

## Number of UK stations broadcasting on analogue, September 2012

| Type of station | AM | FM | AM/FM total |
|---|---|---|---|
| Local commercial | 53 | 228 | 281 |
| UK-wide commercial | 2 | 1 | 3 |
| BBC UK-wide networks | 1 | 4 | 5 |
| BBC local and nations | 36 | 46 | 46 |
| Community radio | 6 | 195 | 201 |
| **TOTAL** | **98** | **474** | **536** |

Source: Ofcom, September 2012
Note: There are a total of 46 BBC local and nations' services, as many BBC services are simulcast on both FM and AM

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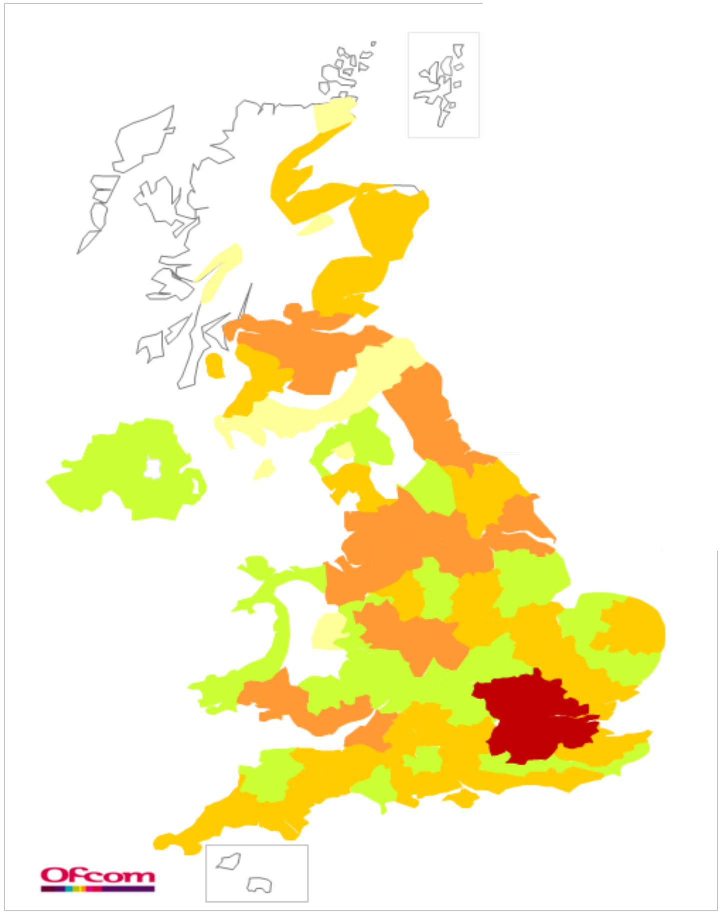
# Figure 5

Number of services available on UK DAB, UK map



| No. services | BBC national | Commercial national | No. local multiplexes |
|---|---|---|---|
| 0 | - | - | - |
| 11 | ✓ | - | - |
| 23 | ✓ | ✓ | - |
| 24-35 | ✓ | ✓ | 1 |
| 36-45 | ✓ | ✓ | 2 |
| 45+ | ✓ | ✓ | 3 |

Source: Ofcom, September 2012

# Figure 4

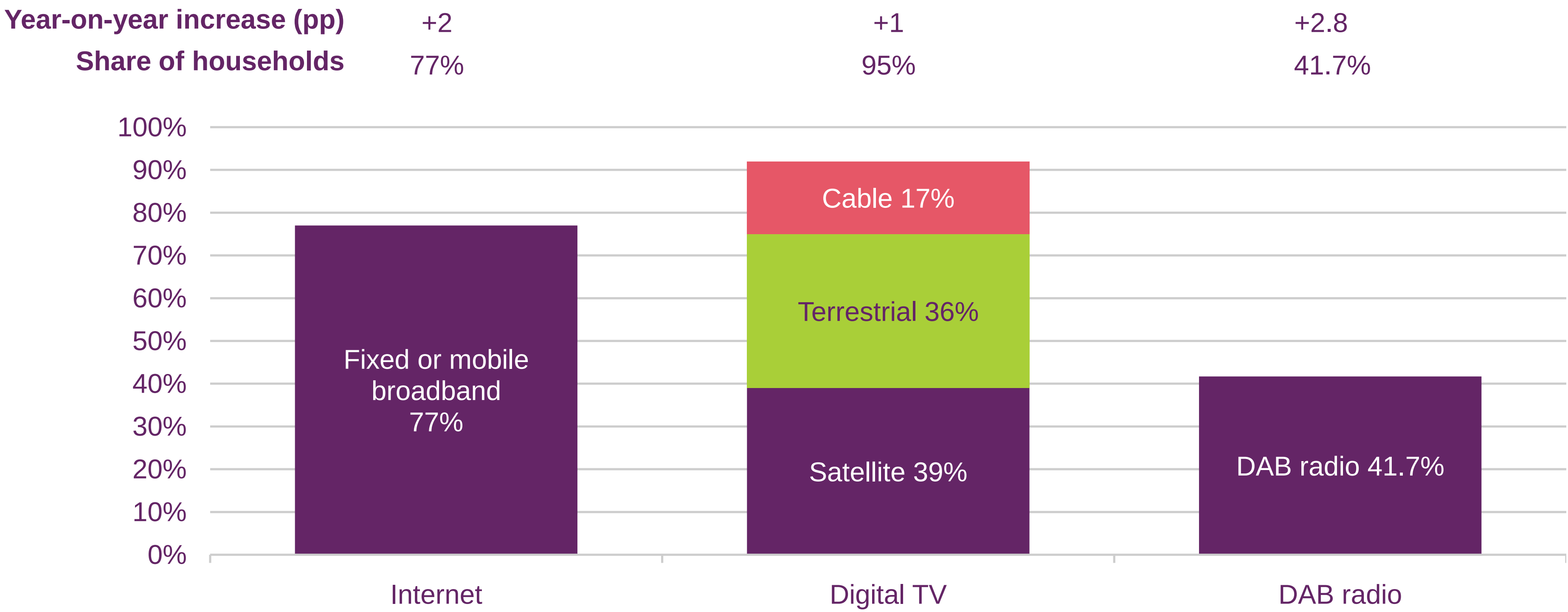
## Number of UK stations broadcasting on DAB, September 2012

| Type of station | Relation to analogue area | Number of stations |
|---|---|---|
| Local commercial | DAB in analogue area | 114 |
| | DAB extends analogue area | 13 |
| | DAB only | 37 |
| UK-wide commercial | | 12 |
| BBC UK-wide networks | | 11 |
| BBC local and nations | | 32 |
| **TOTAL** | | **219** |

Source: Ofcom, September 2012

# Figure 6

Take-up of equipment capable of receiving digital radio, 2012

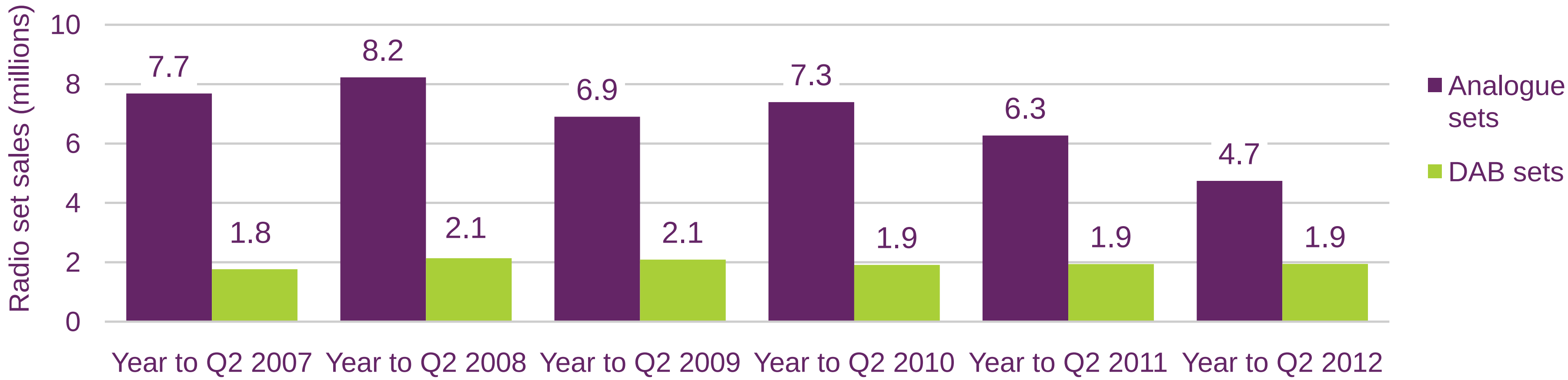



Source: Research from: Ofcom Technology Tracker, RAJAR Q2 2012

# Figure 7

## Number of analogue and digital radio sets sold: year to Q2 2007-2012

| | | | | | | |
|---|---|---|---|---|---|---|
| Total annual sales | 9.4 million | 10.4 million | 9.0 million | 9.3 million | 8.2 million | 6.7 million |
| Digital share of sales | 18.7% | 20.6% | 23.2% | 20.6% | 23.6% | 29.1% |




Source: GfK sales data, 2007-2012.
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.

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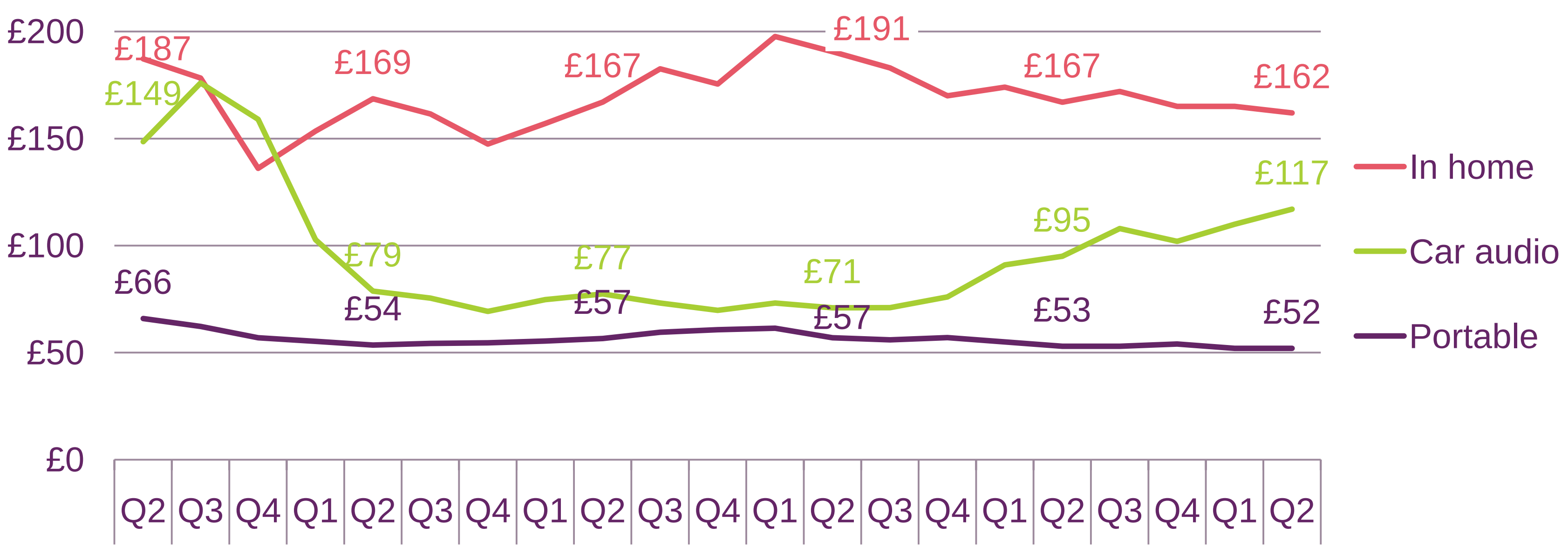
# Figure 8

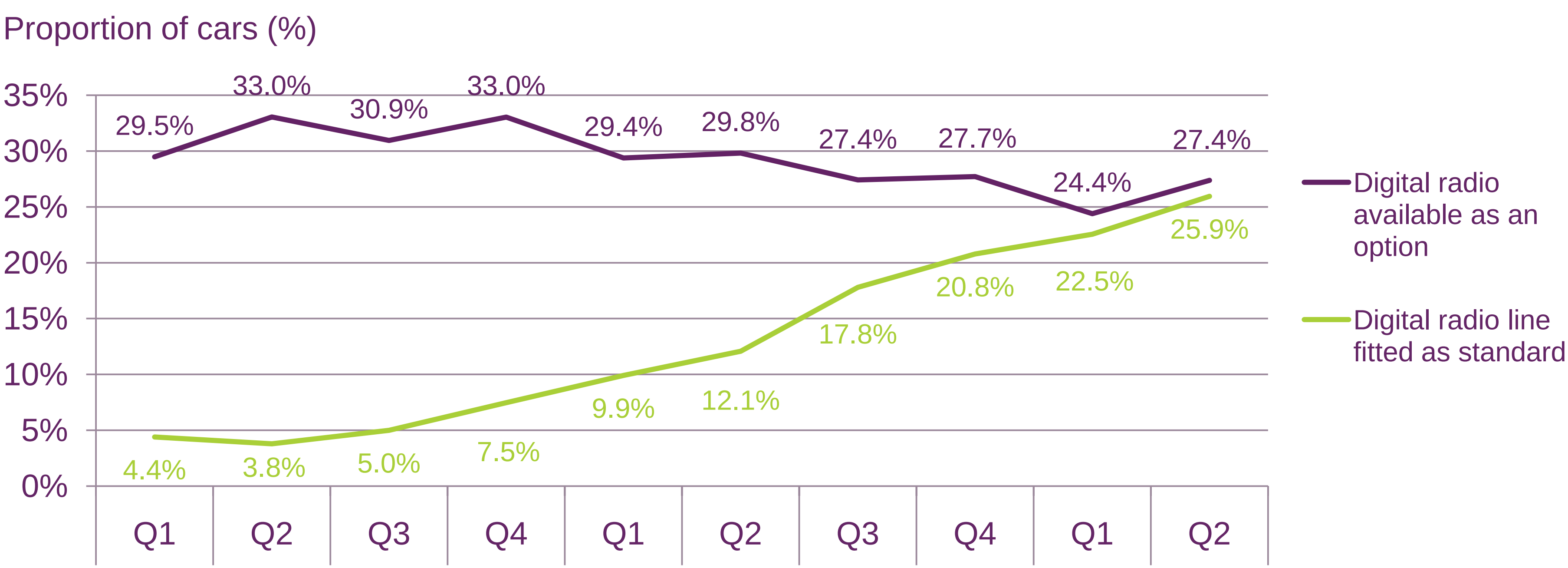
Average price of DAB digital radio receivers sold: Q2 2007 – Q2 2012




Source: GfK sales data, 2007-2012.

# Figure 9

Status of digital radio availability in newly registered cars: Q2 2010 – Q2 2012




Source: CAP/SMMT monthly registration volumes by digital radio option status and availability, Q2 2012

# Figure 10

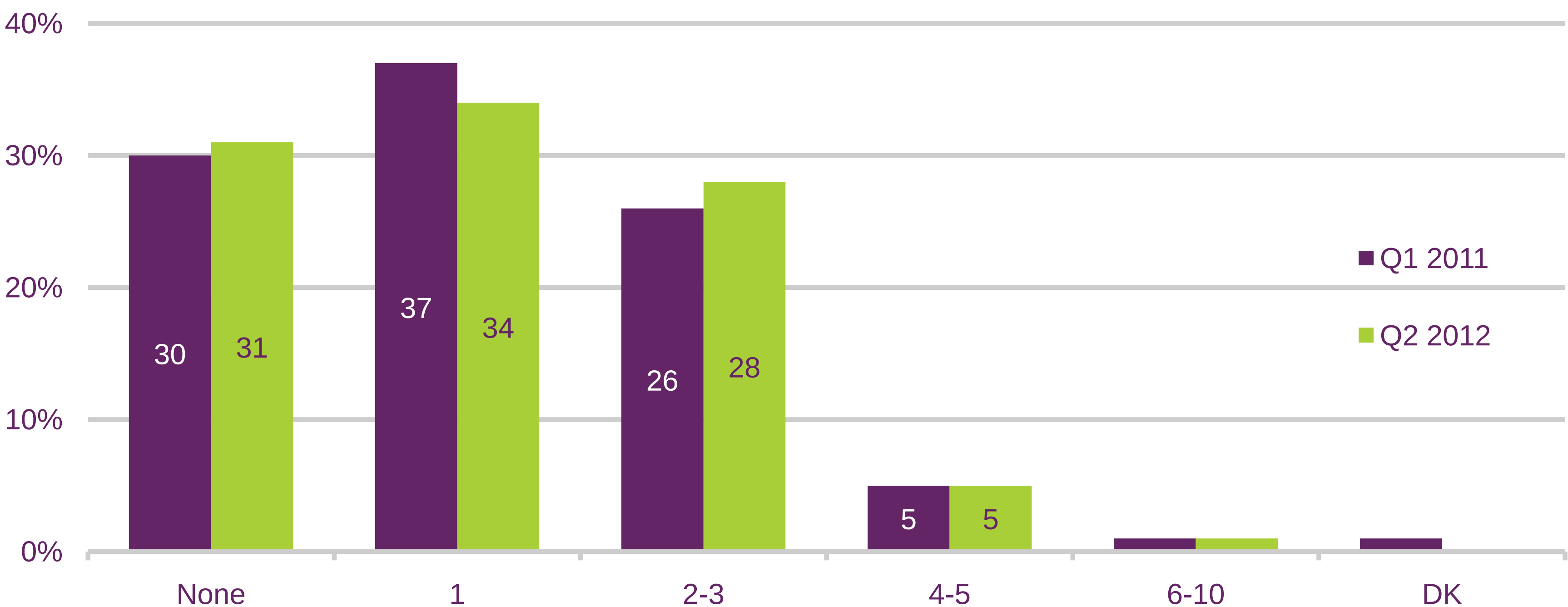
## The radio set universe and frequency of listening

| | Sets in the market (millions) – lower bound estimate[3] | Estimated proportion used at least weekly (%)[4] | Estimated proportion that are digital (%)[5] |
|---|---|---|---|
| In home radios[1] | 66m – 85m | 73% | 17% - 21% |
| Vehicle radios[2] | 35m | 92% | 3-5% |
| **Total** | **101m – 120m** | **83%** | **12%-15%** |

Source: Ofcom research on home radio ownership and vehicle figures from the Department for Transport
Note 1: In-home radios includes hi-fis, portable radios and alarm clock radios.
Note 2: data on the number of vehicles on UK roads, as reported by the Department for Transport in September 2012
Note 3: Due to the complexity of estimating the radio set universe, we have included a range of figures based on consumer research conducted in 2010 and GfK retail sales data for 2000-2012.
Note 4: Frequency of listening figures from Ofcom consumer research May 2010
Base: 1075 UK adults
(Q1) How many working (insert type of device) do you have in your household?
(Q4ii to q6i): How often do you or someone in your household listen to (type of device)?
Note 5: Proportion of home radios including a DAB digital radio tuner draws on GfK sales data

# Figure 11

The number of radio sets in the home that consumers listen to in ‘most weeks’




Source: Ofcom research
Base: All respondents Q1 2011 (3772), Q2 2012 (2893)
QP6. In total, how many radio sets do you have in your home that you, or someone in your household, listen to in most weeks?
Note: This shows that 31% of respondents claimed not to listen to any radio sets in the home in most weeks, which includes 21% of respondents who said they do not listen to radio at all in most weeks. RAJAR data indicates that 35% of all listening takes place outside of the home.

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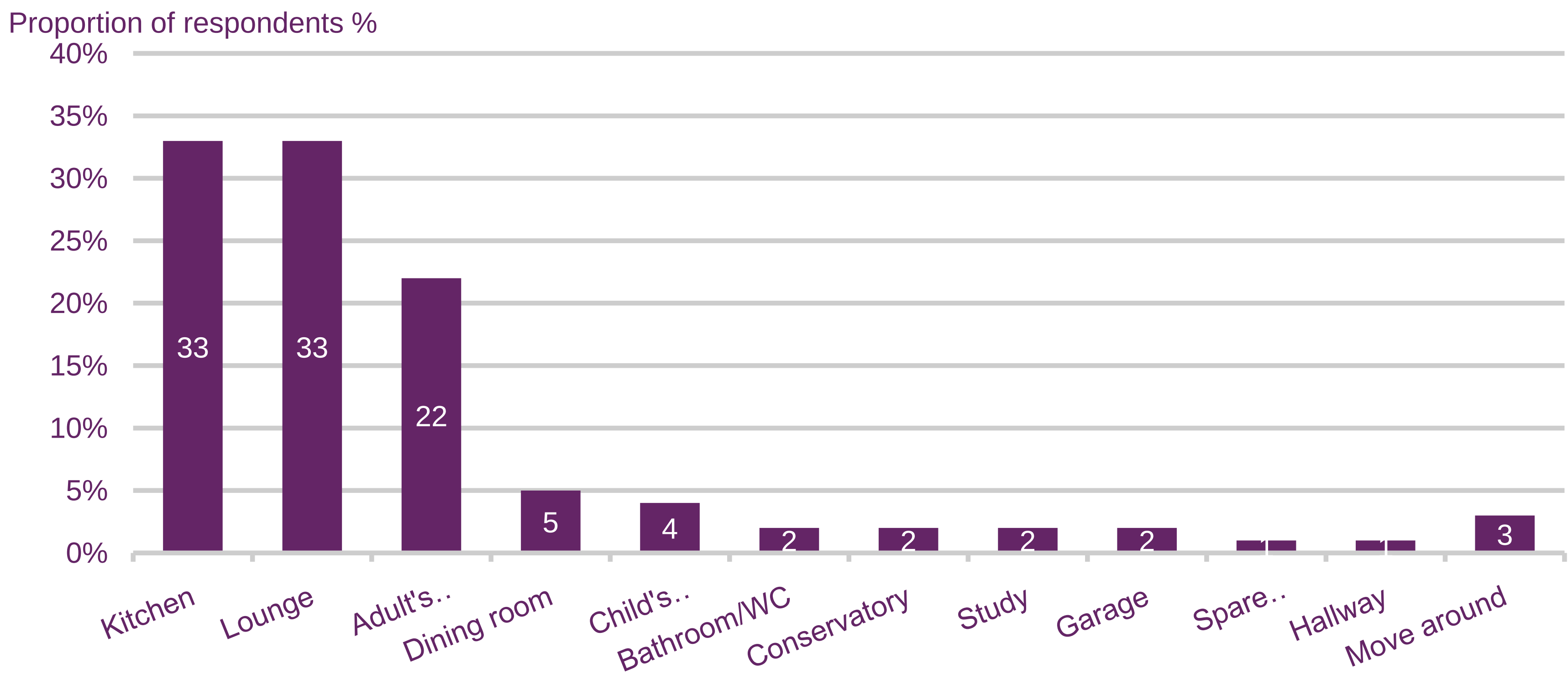
# Figure 12

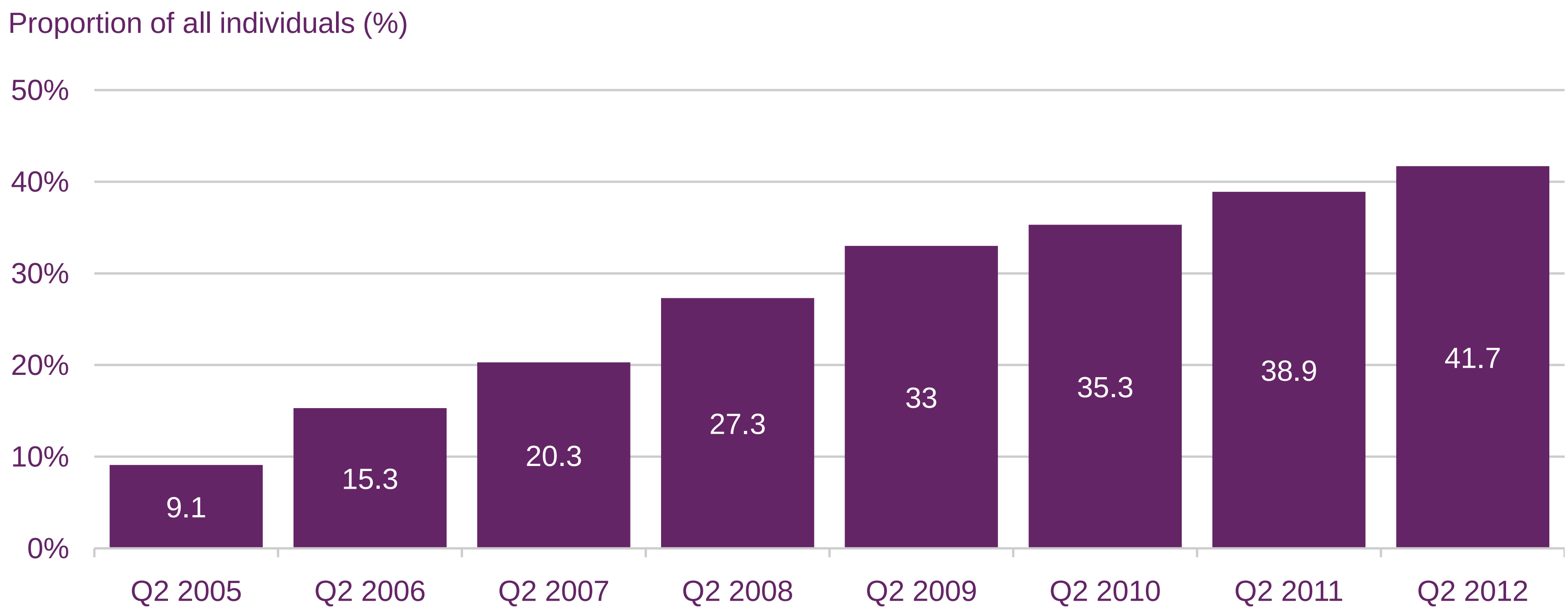
## The location of sets that are used in 'most weeks'




Q4. In which of these rooms at home do you have one of these radios that someone listens to in most weeks?
Source: Ofcom research, Q2 2012
Base: All respondents, n=2893

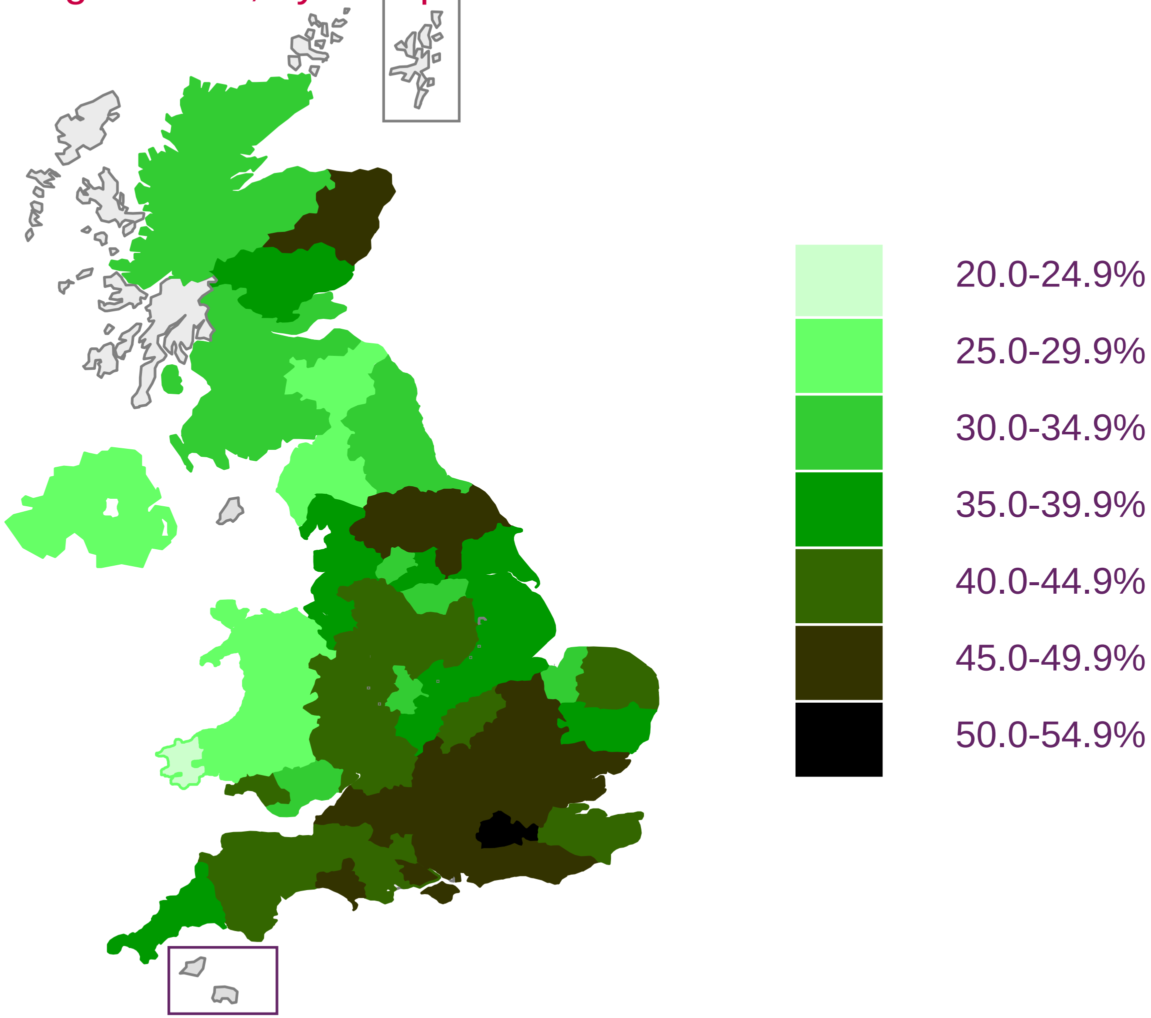
# Figure 13

## Proportion of individuals claiming access to DAB in the home




Source: RAJAR / Ipsos MORI / RSMB

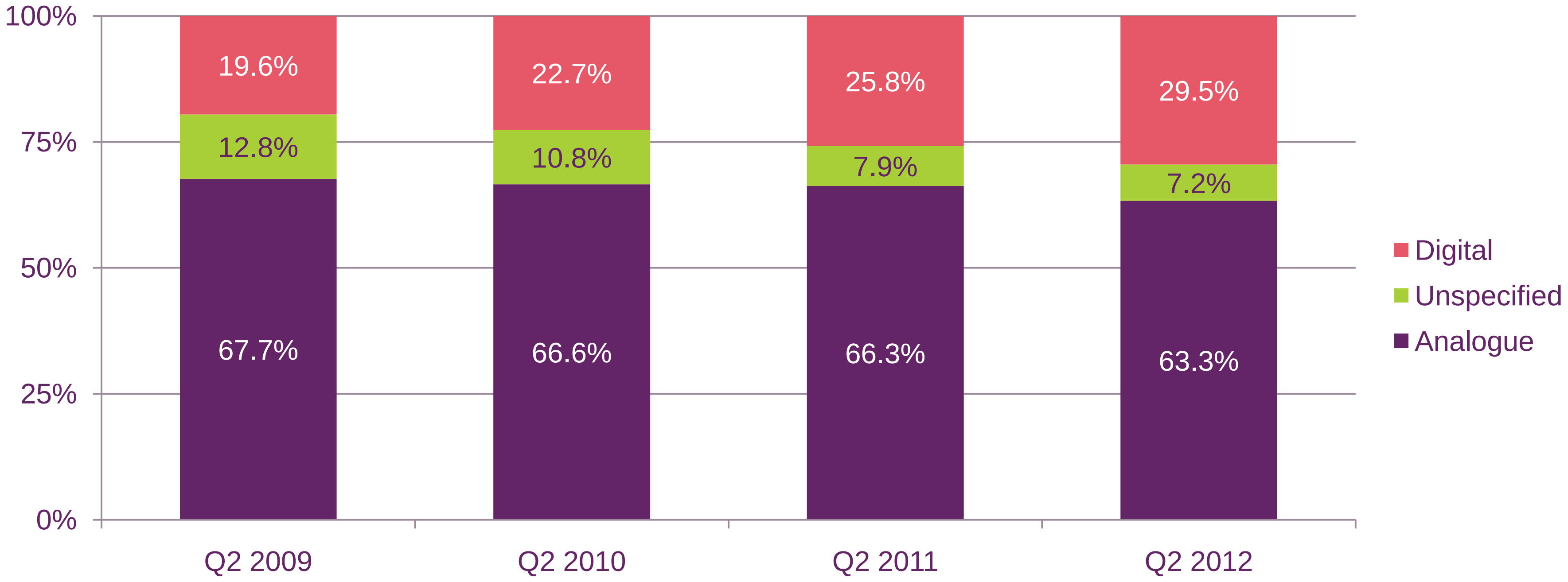
# Figure 14
## Take-up of DAB digital radio, by multiplex area




Source: RAJAR, Q2 2012

# Figure 15

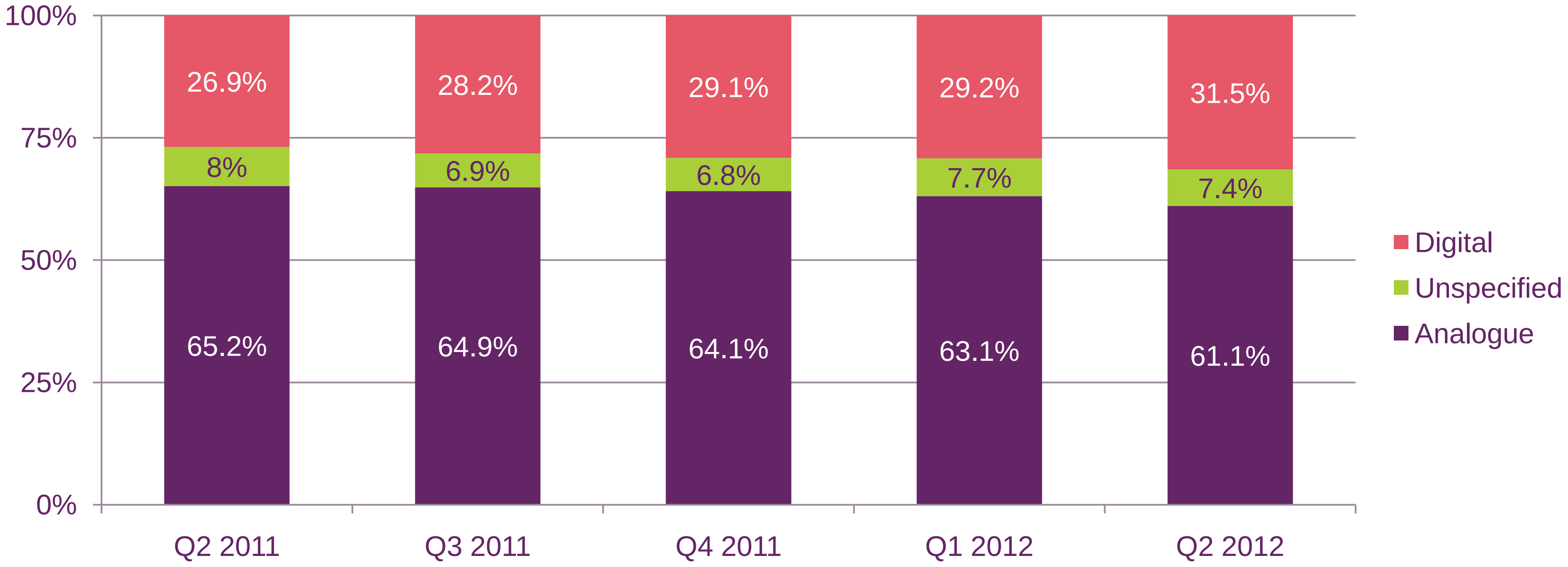
Distribution of listening hours across analogue and digital platforms, the twelve months to Q2: 2009-2012




Source: RAJAR/ Ipsos MORI / RSMB. All adults (15+)
Note: data relate to corresponding year ending each date shown. 'Unspecified' relates to listening where the radio platform was not confirmed by the listener.

# Figure 16

Distribution of listening hours across analogue and digital platforms by quarter: Q2 2011 – Q2 2012




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

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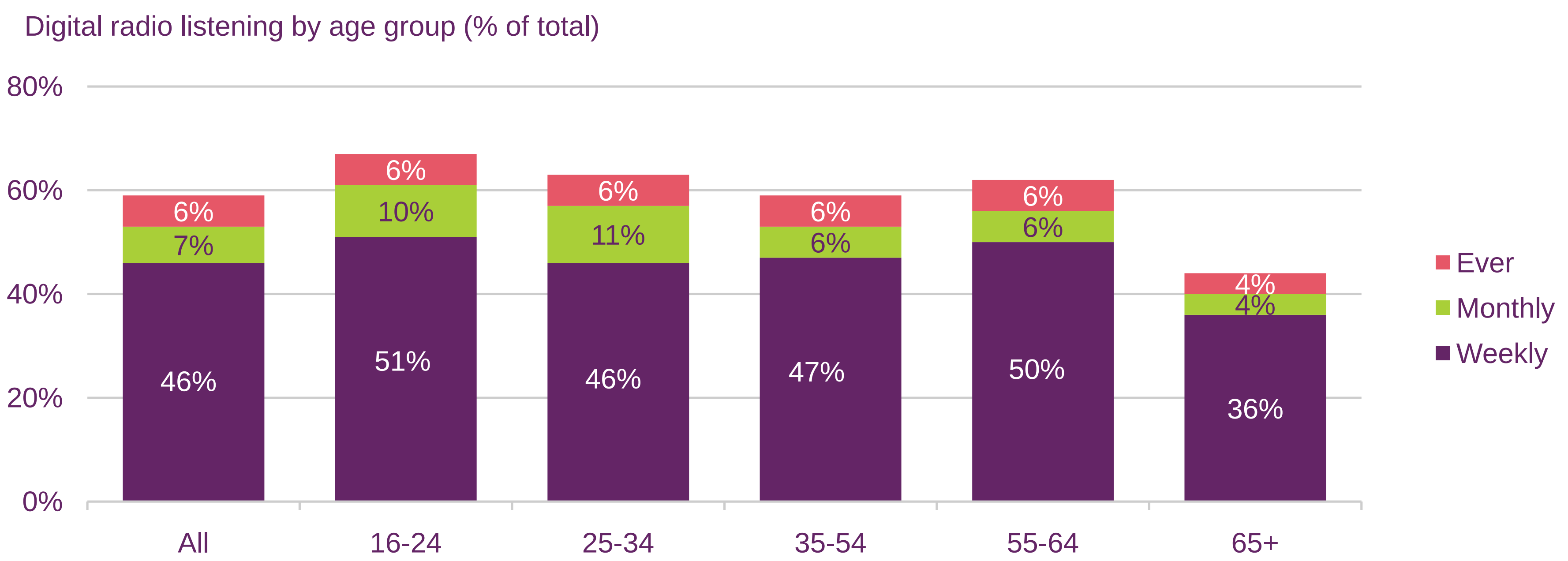
# Figure 17

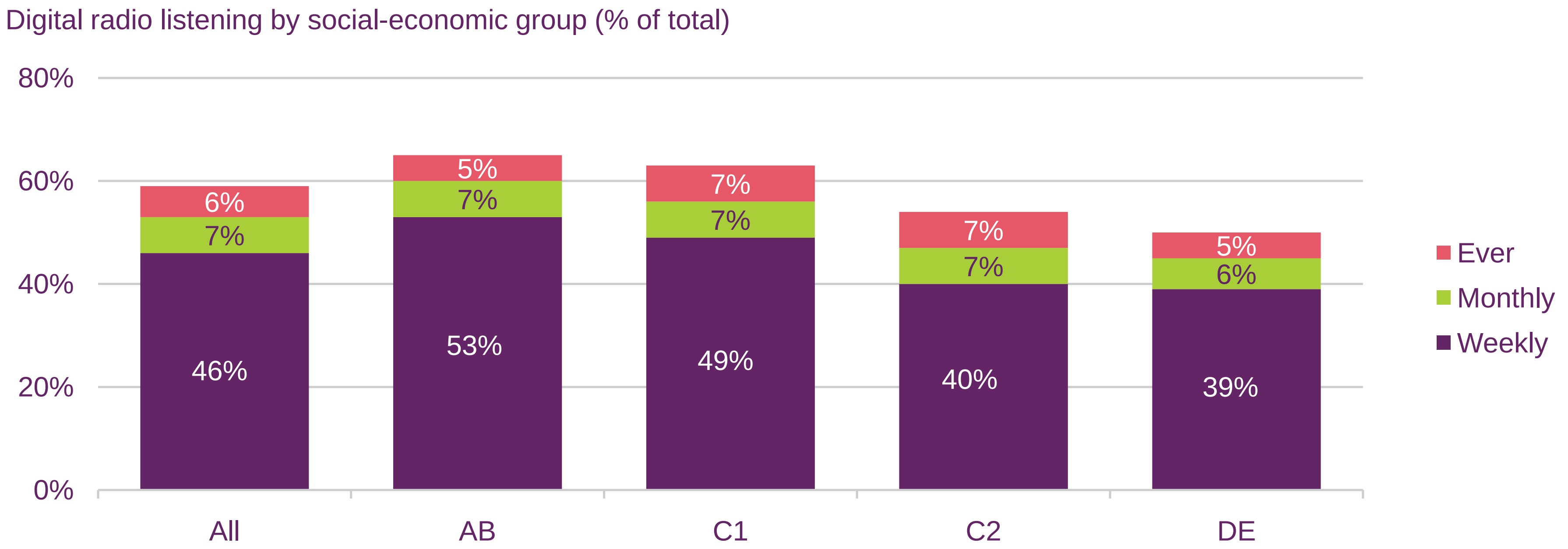
## Proportion of people, by age, who have ever listened to radio through a digital platform




Source: Ofcom research, Q2 2012
Base: All who listen to the radio (n=2284)
Q: Whether ever use digital radio

# Figure 18

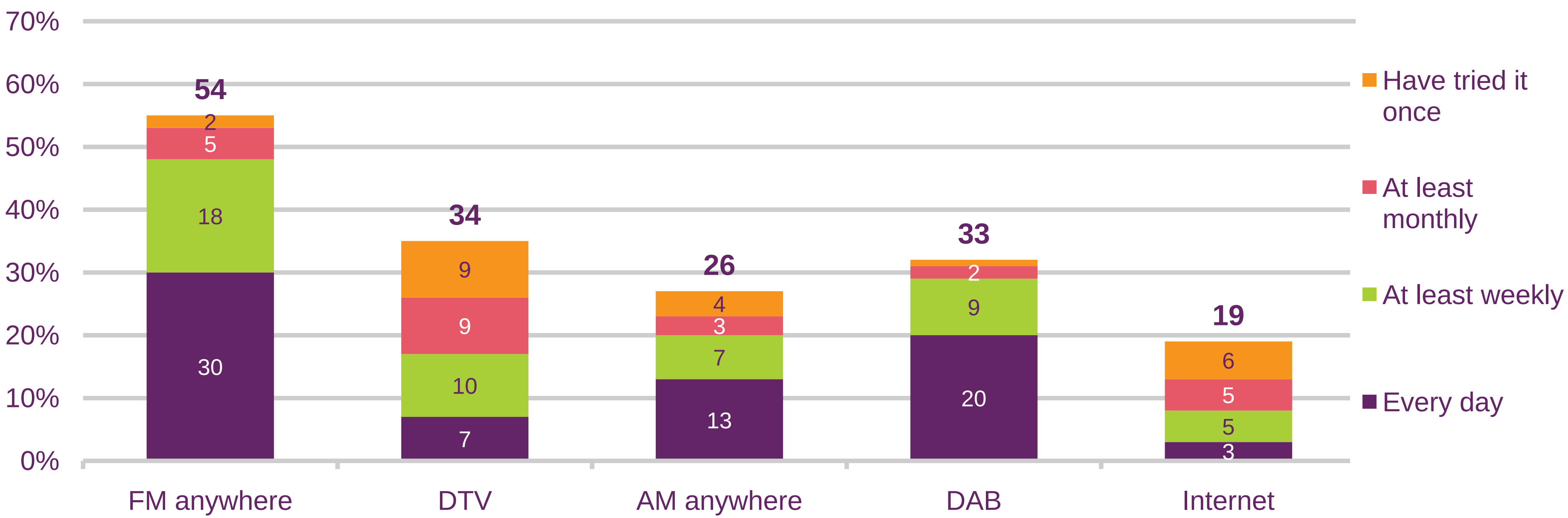
Those who listen to digital radio at least weekly, by socio-economic group




Source: Ofcom research, Q2 2012
Base: All who listen to the radio (n=2284)
Q: Whether use digital radio at least weekly

# Figure 19

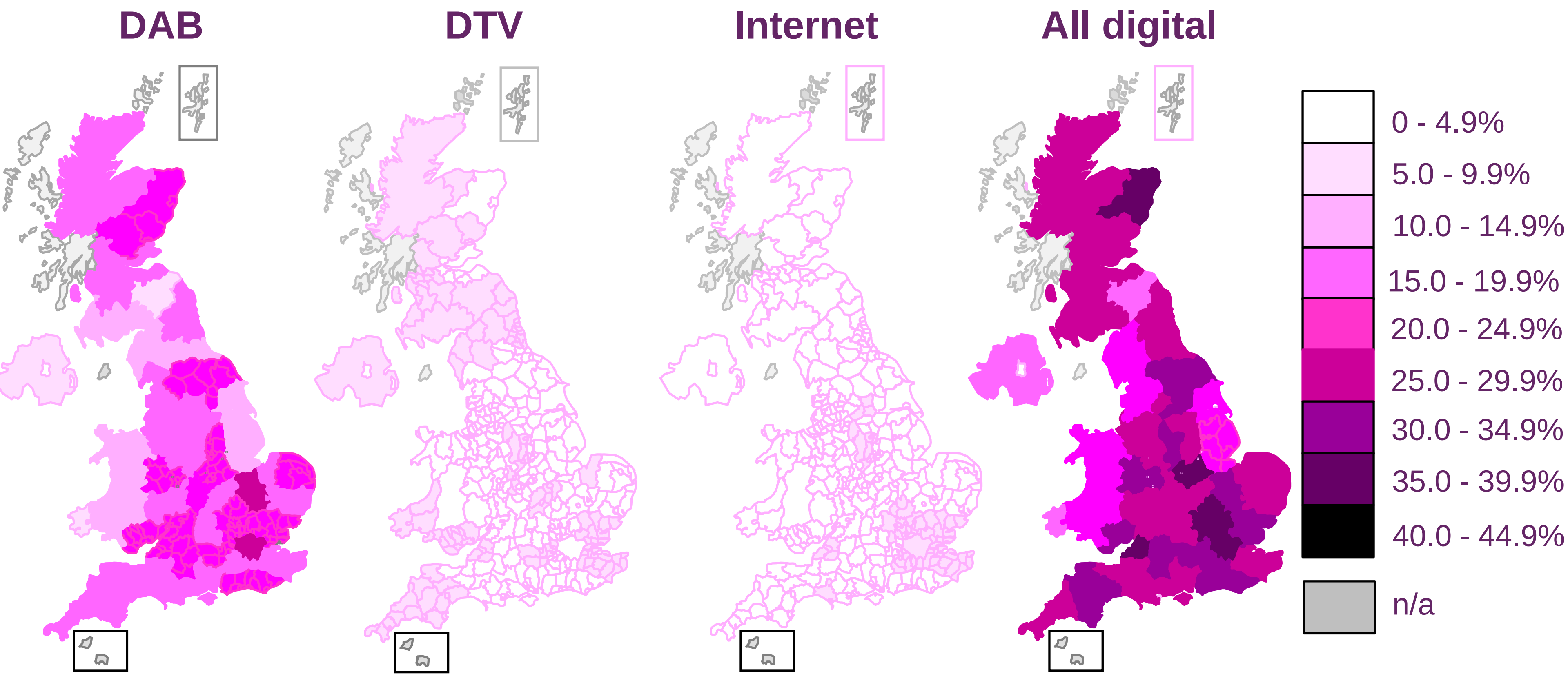
## Frequency of radio listening, by platform




Q4. How often, if at all, do you access the radio via…
Source: Ofcom research, Quarter 2 2012
Base: Adults aged 16+ who listen to radio n = 2284 UK
Note: Remaining percentages are 'Don't know' responses.

# Figure 20

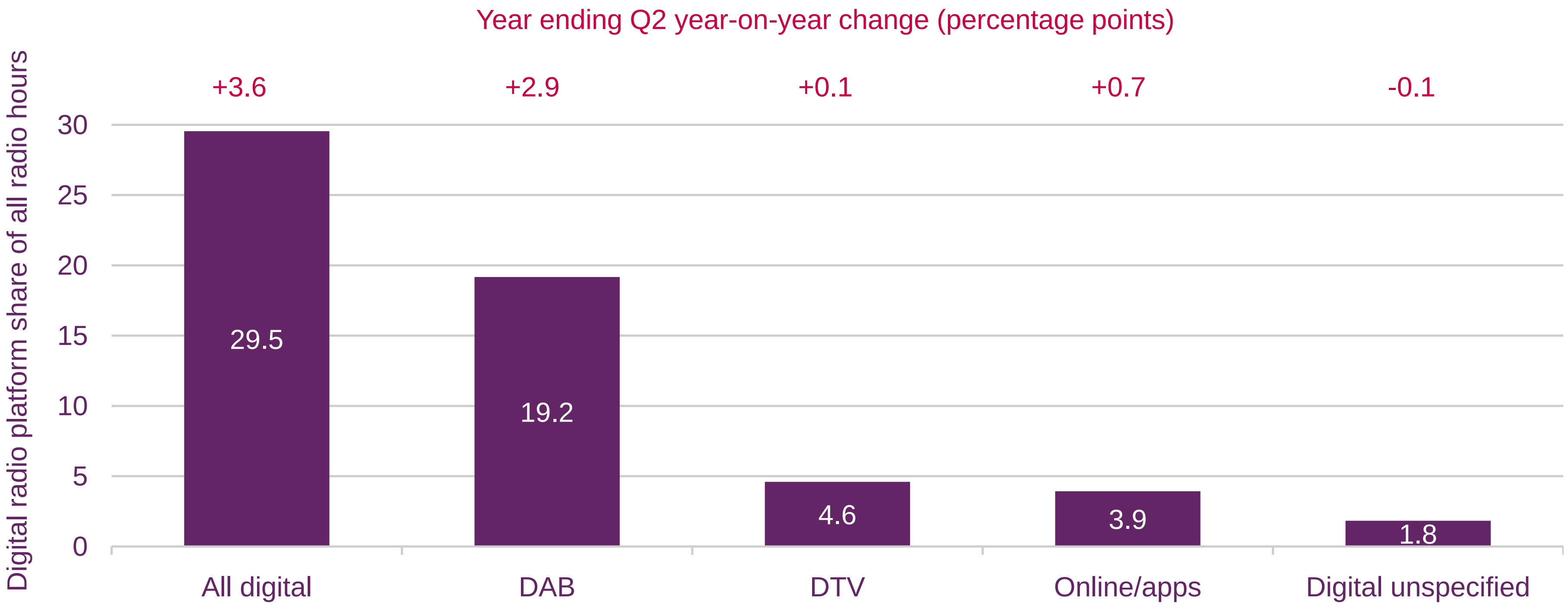
Share of listening, by digital platform and area




Source: RAJAR, Q2 2012

# Figure 21

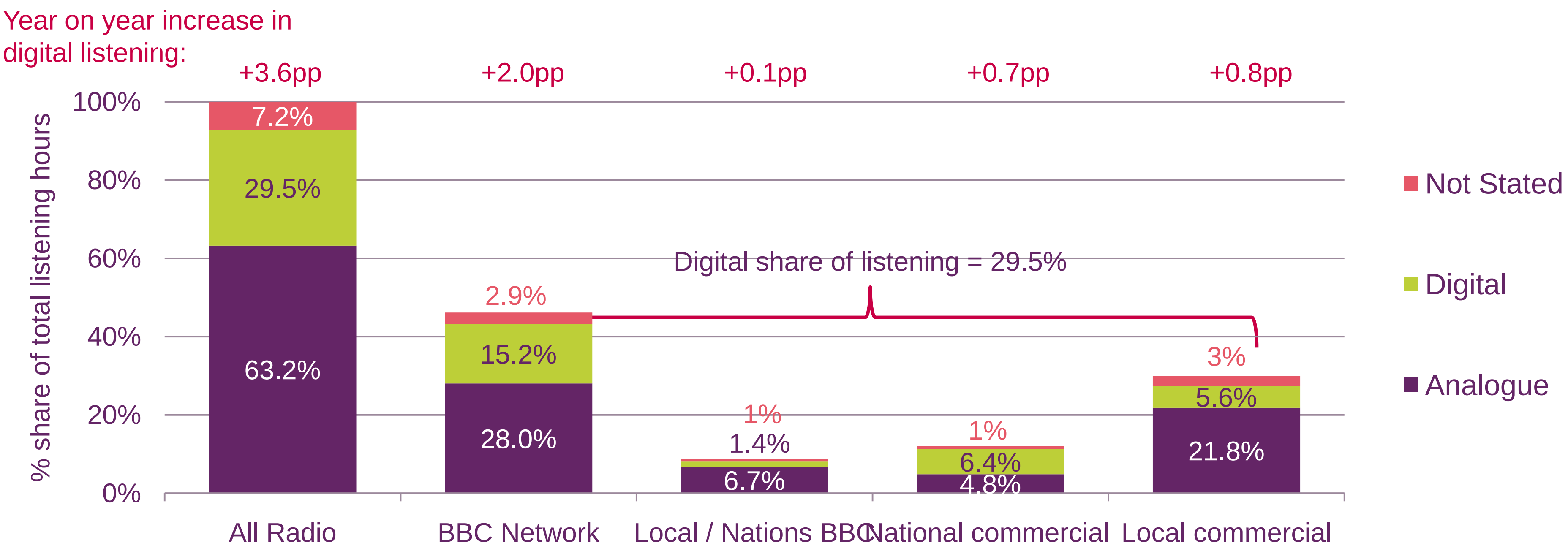
## Digital radio's share of total radio listening hours, by platform




Source: RAJAR , all adults (15+), year ending Q2 2012
Note: 'Digital unspecified' relates to listening to digital-only stations, where the survey respondent has not specified the listening platform used.

# Figure 22

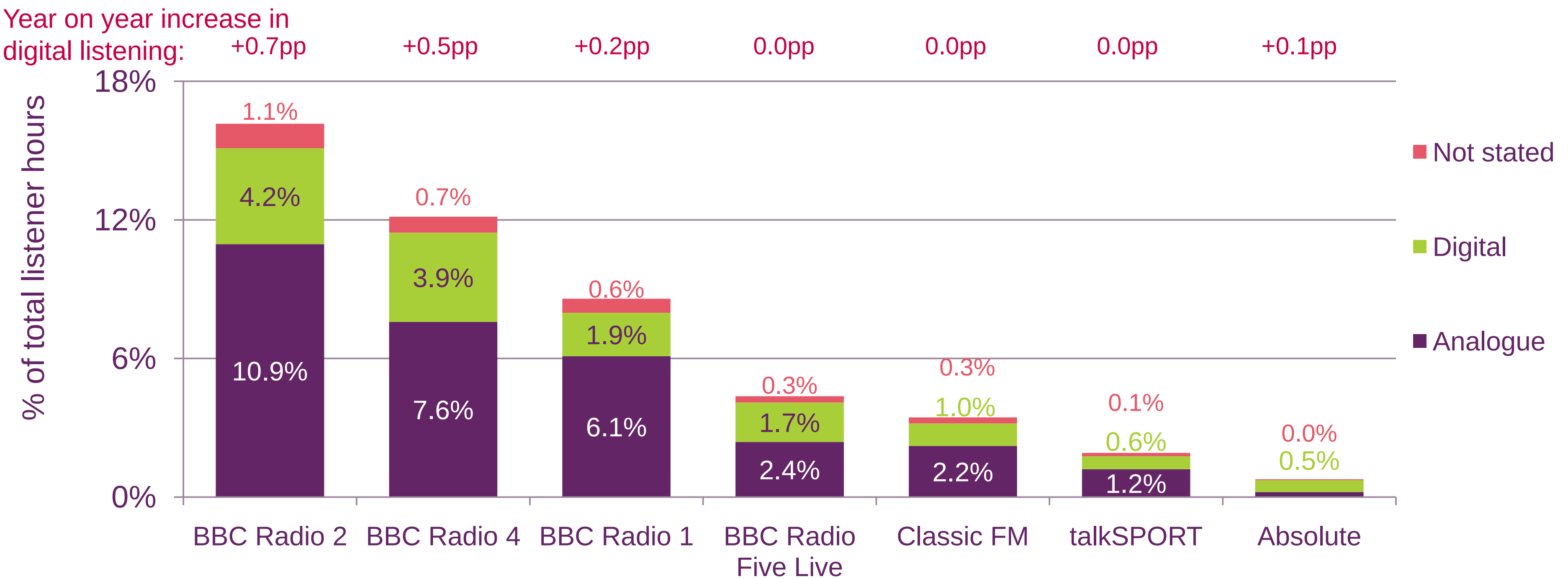
Distribution of listener hours, by service provider, between analogue and digital platforms, year to Q2 2012




Source: RAJAR , all adults (15+), year ending Q2 2012

# Figure 23

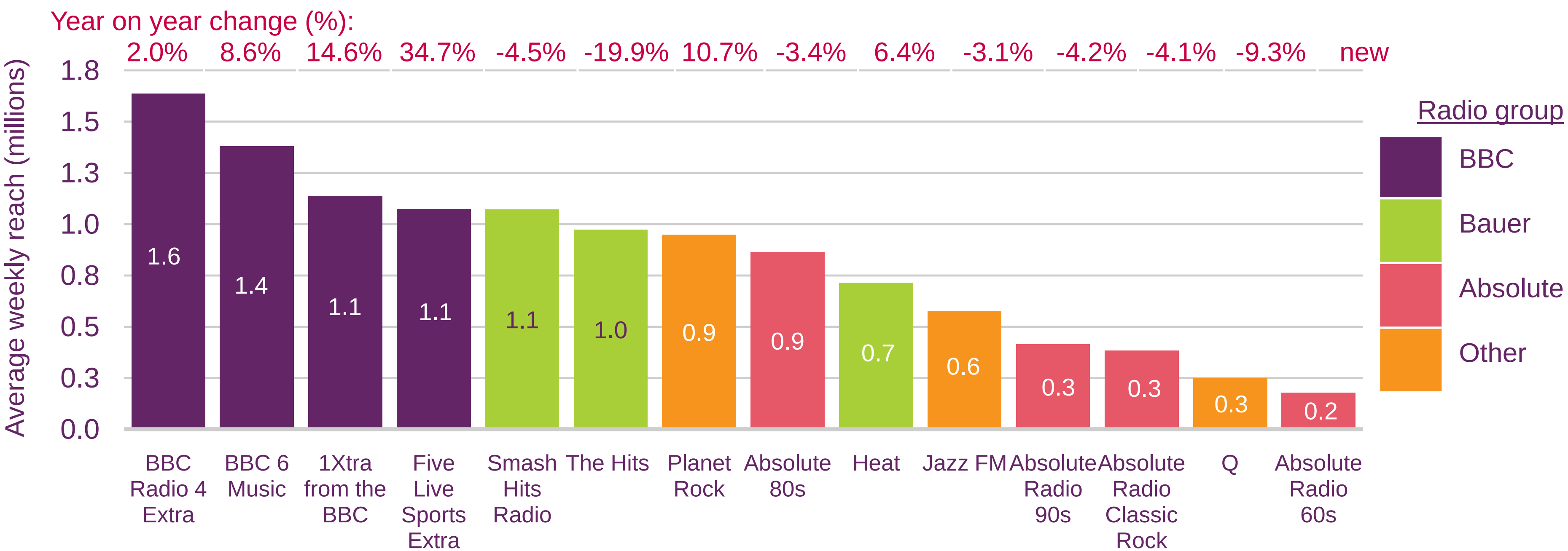
Distribution of listener hours, by service, between analogue and digital platforms, year to Q2 2012




Source: RAJAR , all adults (15+), year ending Q2 2012

# Figure 24

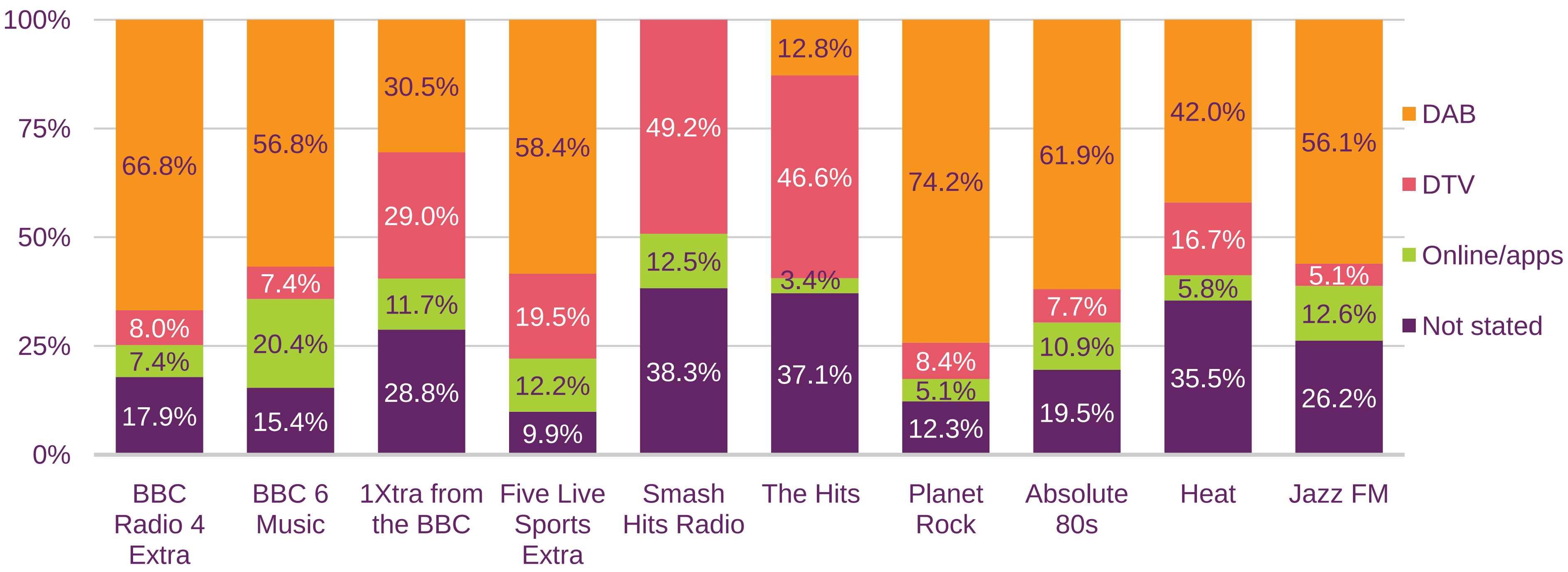
## Digital-only stations by average weekly reach, Q2 2012




Source: RAJAR , all adults (15+), year ending Q2 2012

# Figure 25

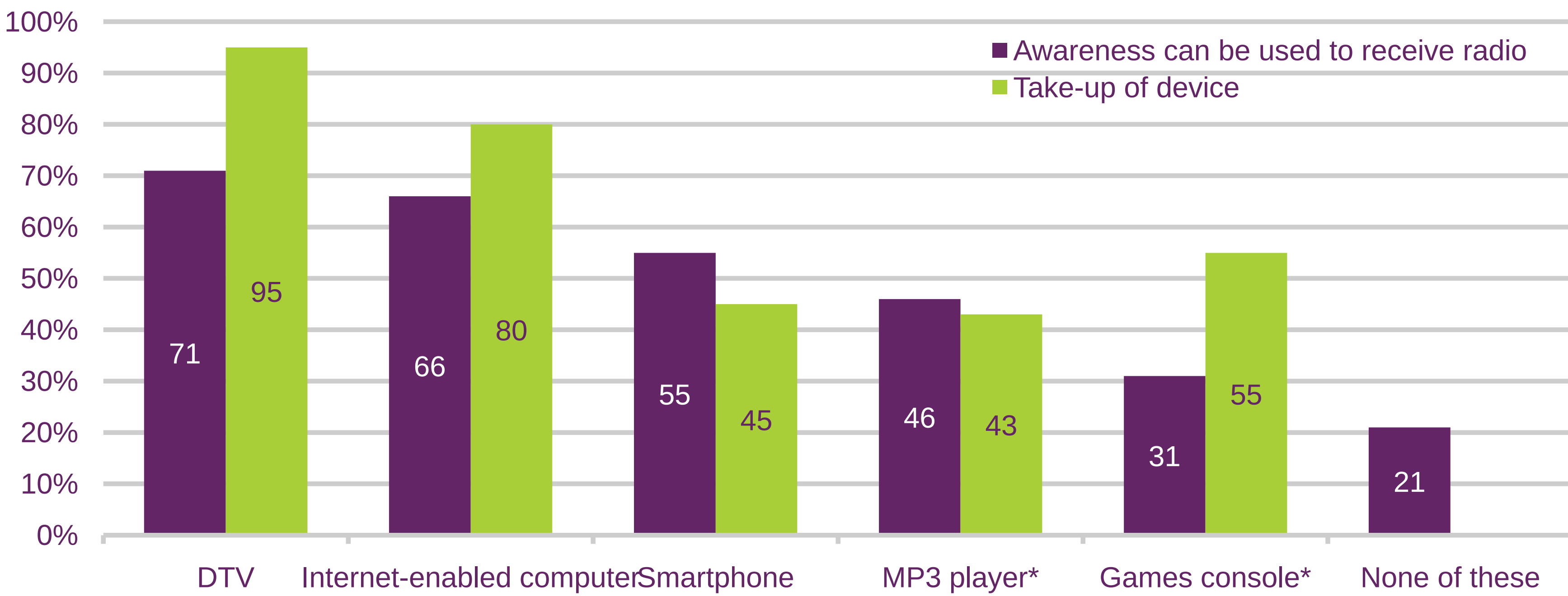
## Most listened to digital-only stations by platform, Q2 2012




Source: RAJAR , all adults (15+), year ending Q2 2012

# Figure 26

## Awareness of devices capable of receiving digital radio services




Source: Ofcom research, Q2 2012, *Take-up measures from Q1 2012
Base: All respondents, n=2893
Q. Before today, were you aware that you can listen to radio programmes as they are broadcast in these ways?

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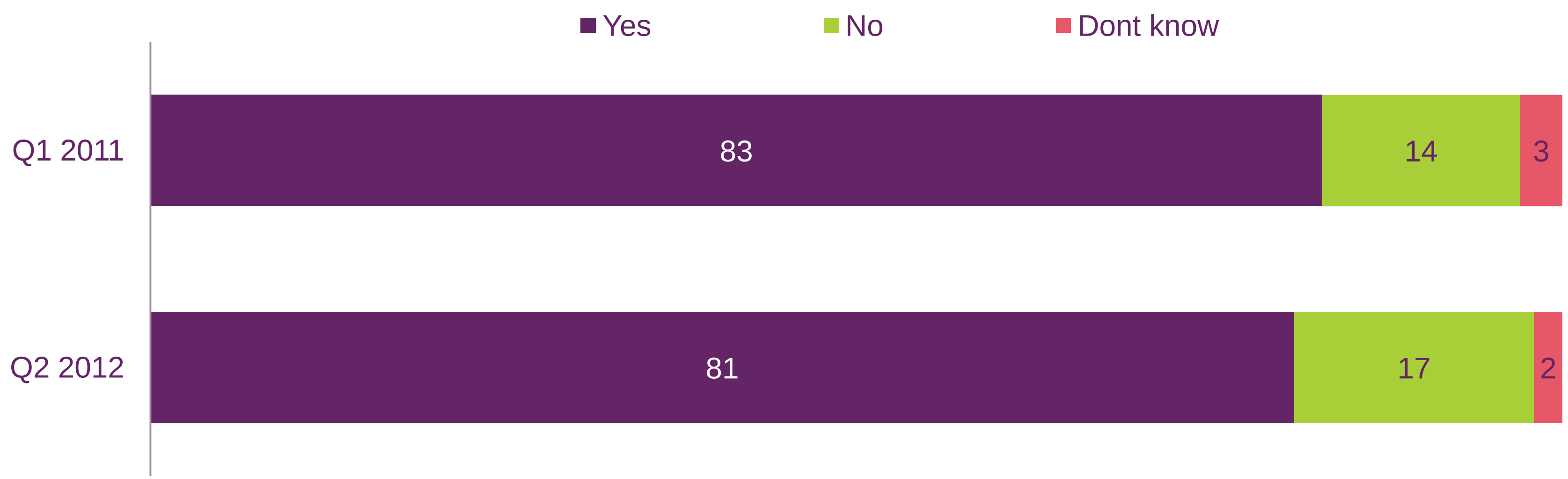
# Figure 27

## Awareness of digital radios, sometimes called 'DAB digital radio'

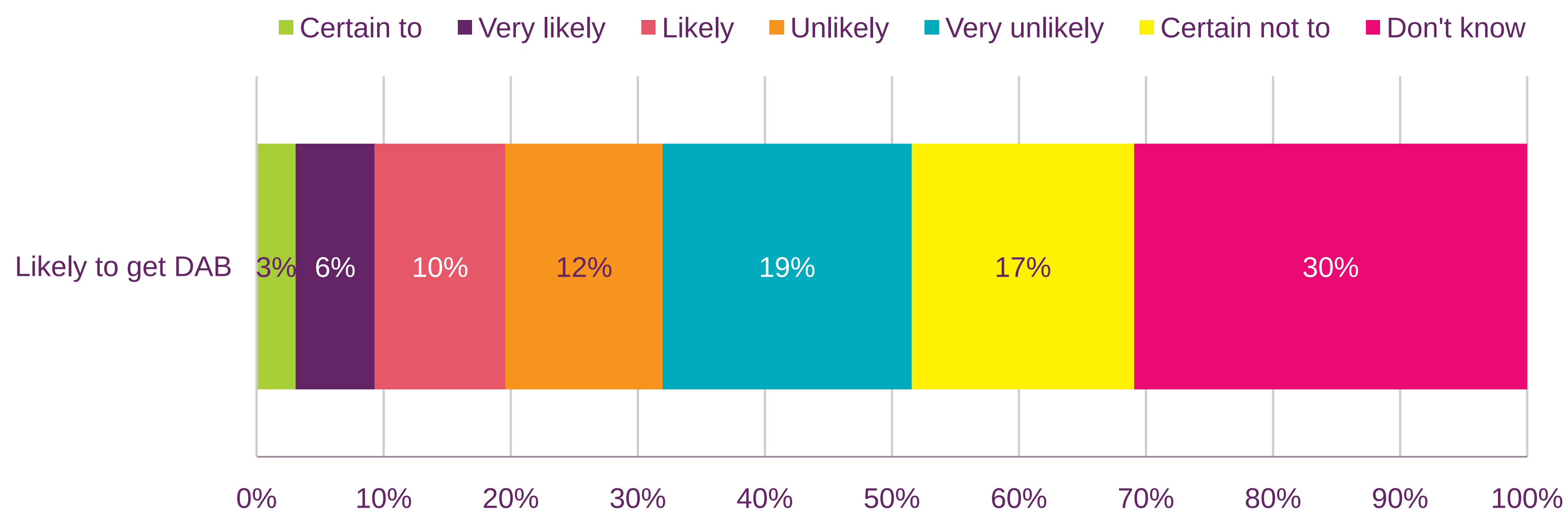



Source: Ofcom research, Q1 2011, Q2 2012
Base: All adults
Q3. Before today, had you heard of digital radios, sometimes called D-A-B radios? Digital radios are sometimes called D-A-B radios and may have ones of these logos (SHOW CARD). They can receive more radio stations and have a clear signal with no interference. It doesn't simply refer to a radio with a digital display panel.

# Figure 28

## Likelihood of purchasing a DAB set

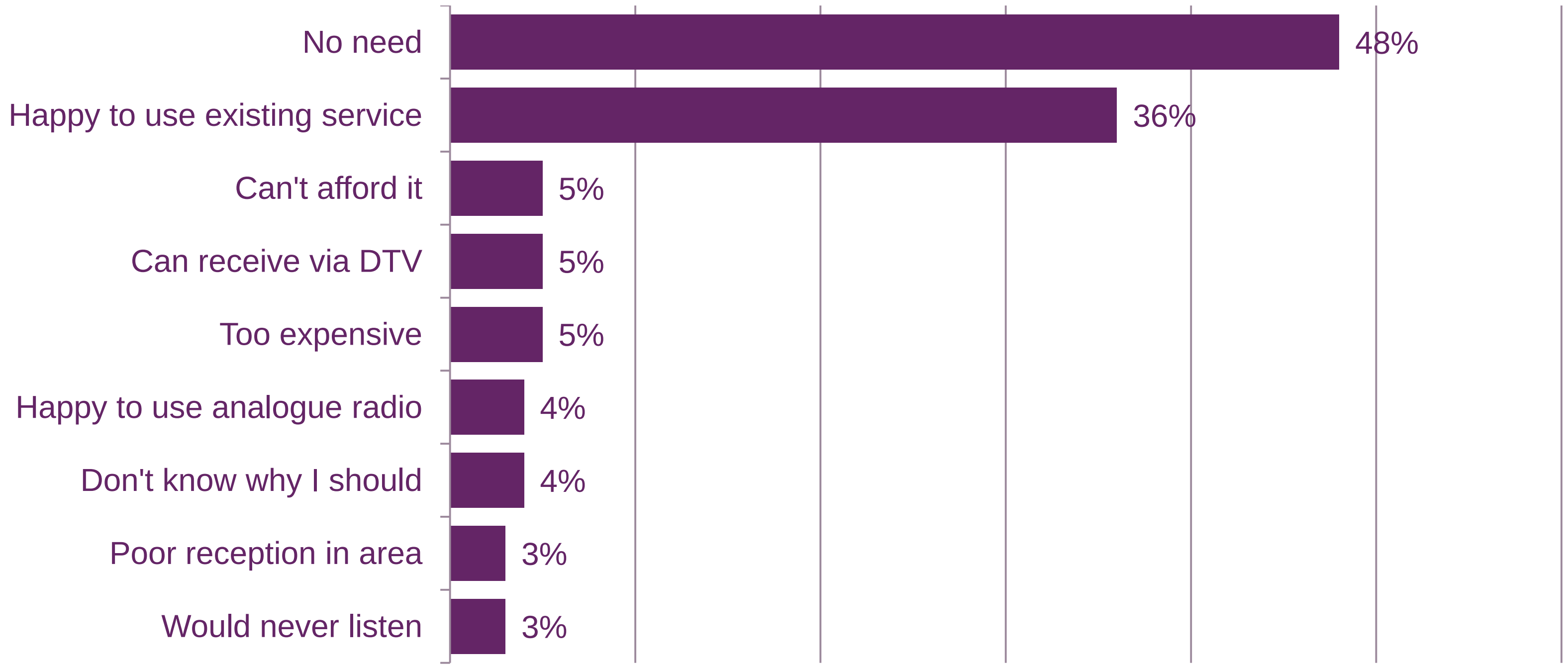
Percentage of respondents who listen to the radio, have any active radio sets at home but have no DAB set in the home




Source: Ofcom research, Q2 2012
Base: Those who listen to the radio but have no DAB sets in the home (n=1005)
QP12: How likely is it that your household will get a DAB radio in the next 12 months?

# Figure 29

## Reasons for not acquiring a DAB digital radio set




Source: Ofcom research, Q2 2012
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?

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