The Communications Market:

Digital radio report chart pack

July 2011

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Basis of report publication

- The Government announced its Digital Radio Action Plan in July 2010. Ofcom was asked in the plan to publish an annual report on the availability and take-up of digital radio services. This is the therefore the first of those reports.

- The plan emphasises that digital radio switchover should only begin when the market is ready for such a process and that it should therefore be predominantly consumer-led. An aspirational target date of 2015 was supported by the report. But it also concluded that a decision on switchover could only made once two criteria had been fulfilled:

  – 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, coverage project, designed to measure current levels of FM and DAB coverage and take-up.

- 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.

Figure 1: Existing DAB Coverage

Existing DAB coverage	Aggregate of local multiplexes	BBC national	Commercial national (Digital One)
Households (robust)	66.2%	92.2%	84.6%
Roads (robust mono)	42.9%	73.4%	63.5%

Source: Ofcom, June 2011

Figure 2: Existing FM Coverage

Existing DAB coverage	Aggregate of local multiplexes	BBC national (BBC Radios 1 to 4)	Commercial national (Classic FM)
Households (robust)	92.6%	94.9%	90.9%
Households (variable)	97.9%	99.1%	97.4%
Roads (robust mono)	91.5%	93.1%	86.8%
Roads (variable mono)	95.5%	95.8%	90.3%

Source: Ofcom, June 2011

Figure 3: Number of UK radio stations broadcasting on analogue, July 2011

Type of station	AM	FM	AM/FM total
Local commercial	53	245	298
UK-wide commercial	2	1	3
BBC UK-wide networks	1	4	5
BBC local and nations	36	46	46
Community radio	4	188	193
TOTAL	**96**	**484**	**545**

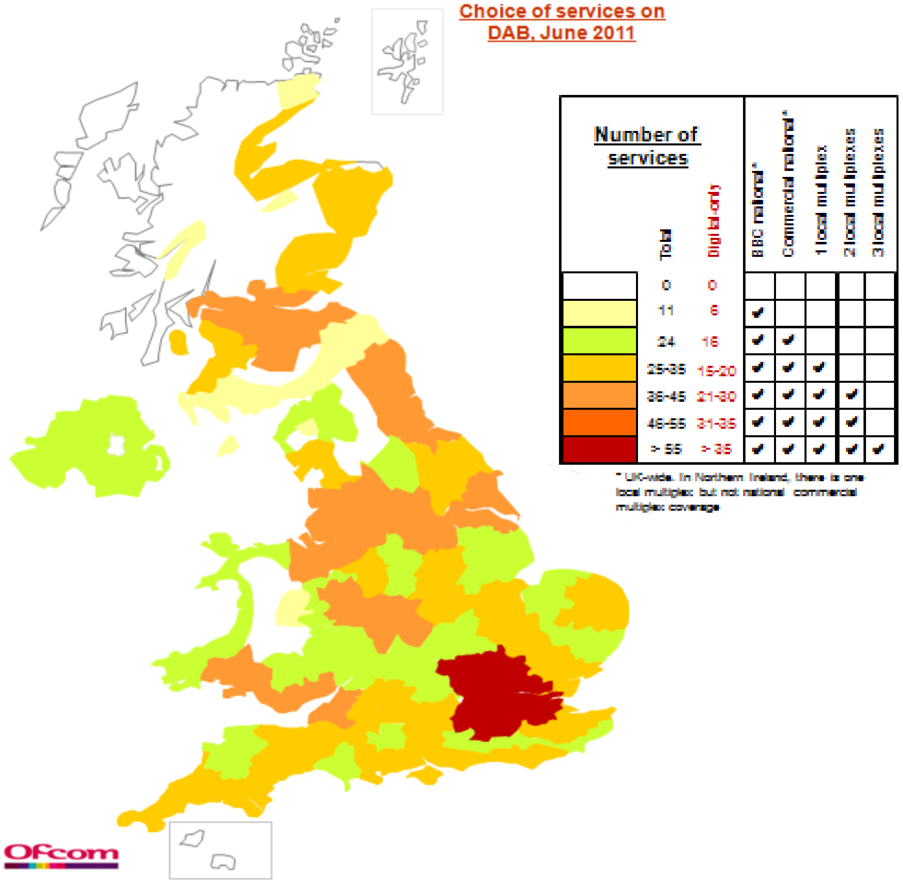
Source: Ofcom, July 2011

Figure 4: Number of radio stations broadcasting on DAB, July 2011

Type of station	Relation to analogue area	Number of stations
Local commercial	DAB in analogue area	101
	DAB extends analogue area	14
	DAB only	37
UK-wide commercial		13
BBC UK-wide networks		11
BBC local and nations		32
TOTAL		**208**

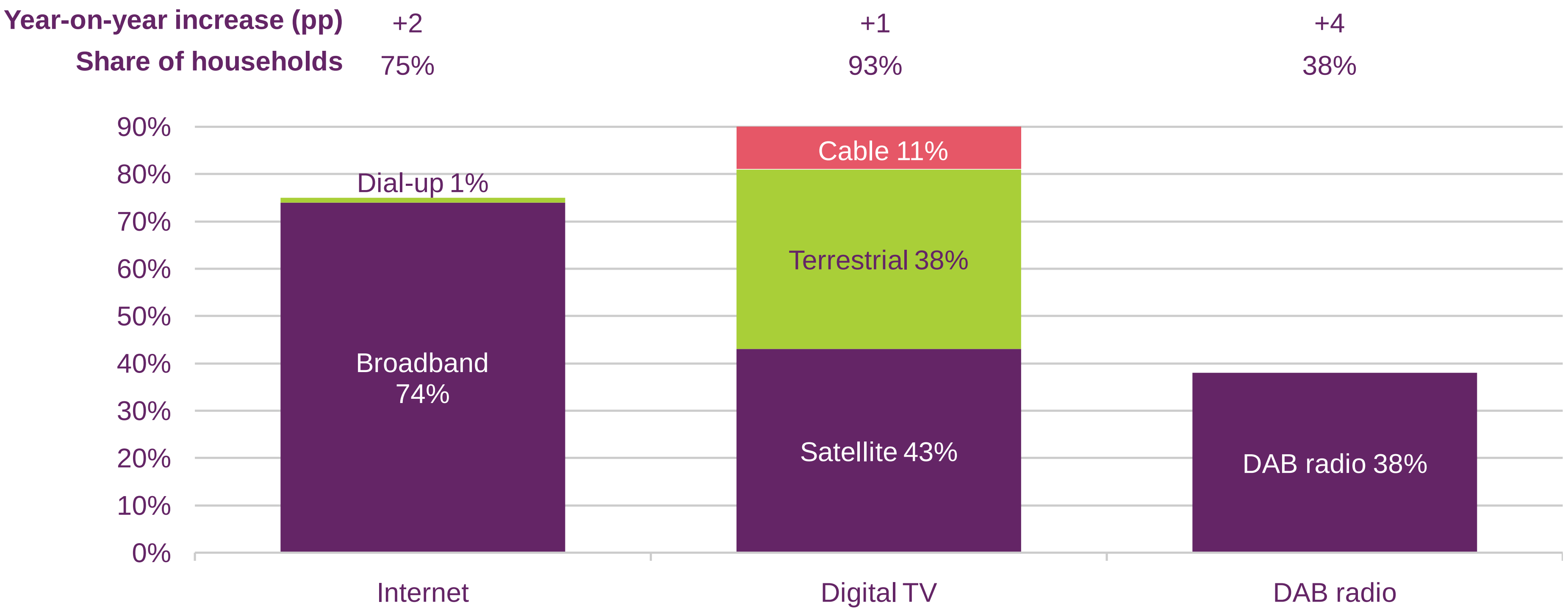
Source: Ofcom July 2011

Figure 5: Number of services available on DAB, UK map



Source: Ofcom, July 2011

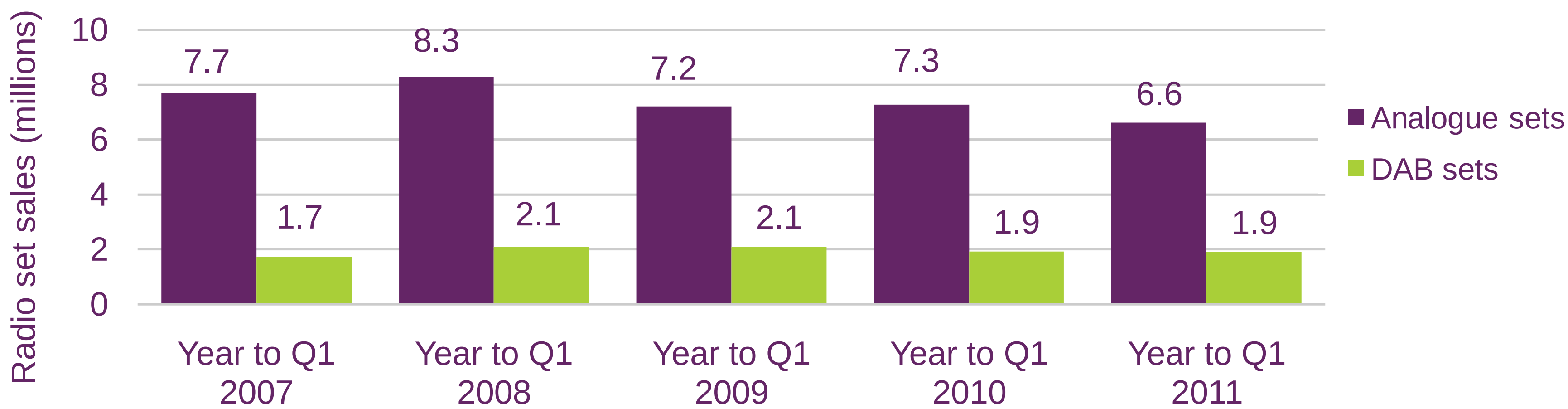
Figure 6: Take-up of equipment capable of receiving digital radio, 2011



Source: Research from: Ofcom, GfK and RAJAR in Q1 2011

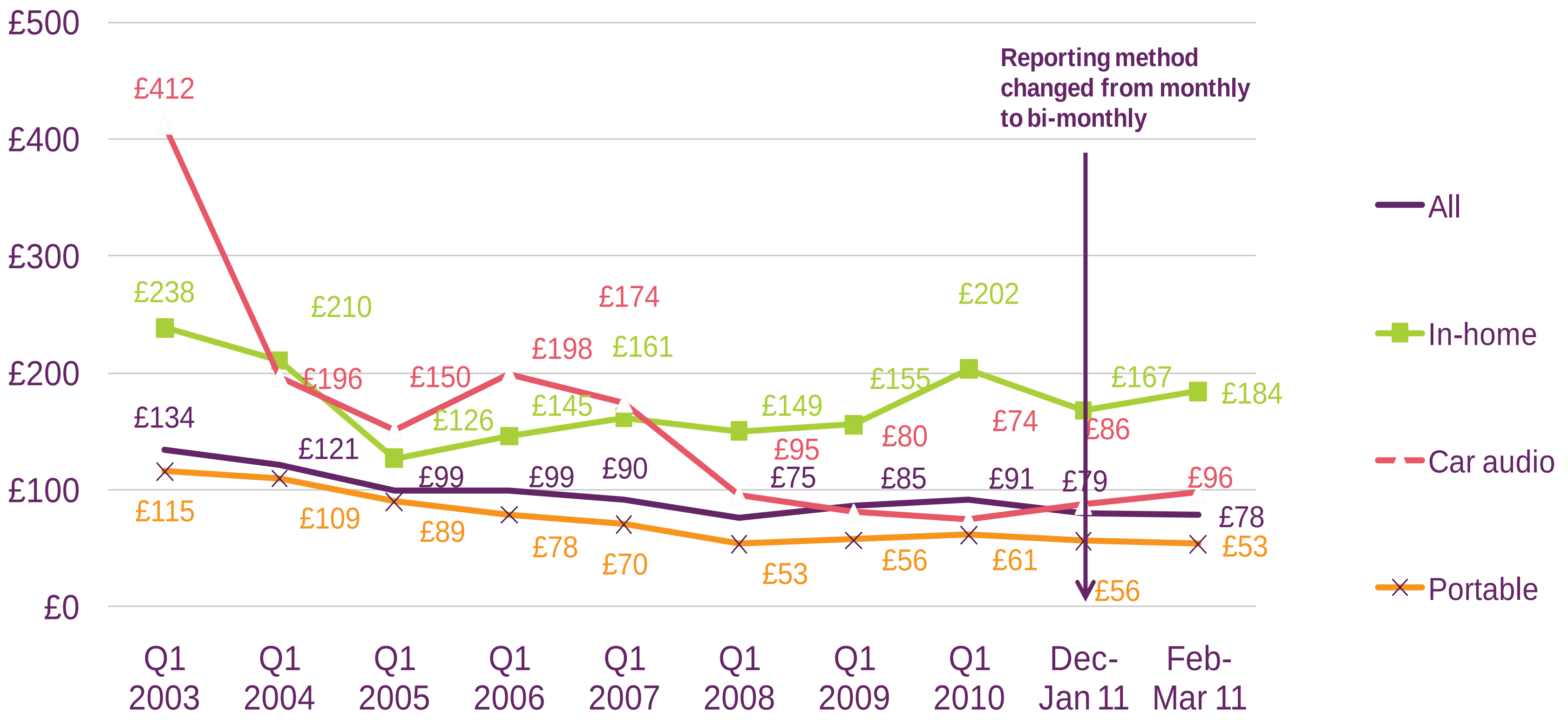
Figure 7: Number of analogue and digital radio sets sold

Total annual sales	9.4 million	10.4 million	9.3 million	9.2 million	8.5 million
Share of sales	81.5% 18.5%	79.9% 20.1%	77.5% 22.5%	79.1% 20.9%	77.7% 22.3%



Source: GfK sales data, 2006-2011. Note: Figures cover GB only, GfK Panel. Market 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: Average price of DAB digital radio receivers sold



Source: GfK sales data 2003-2011

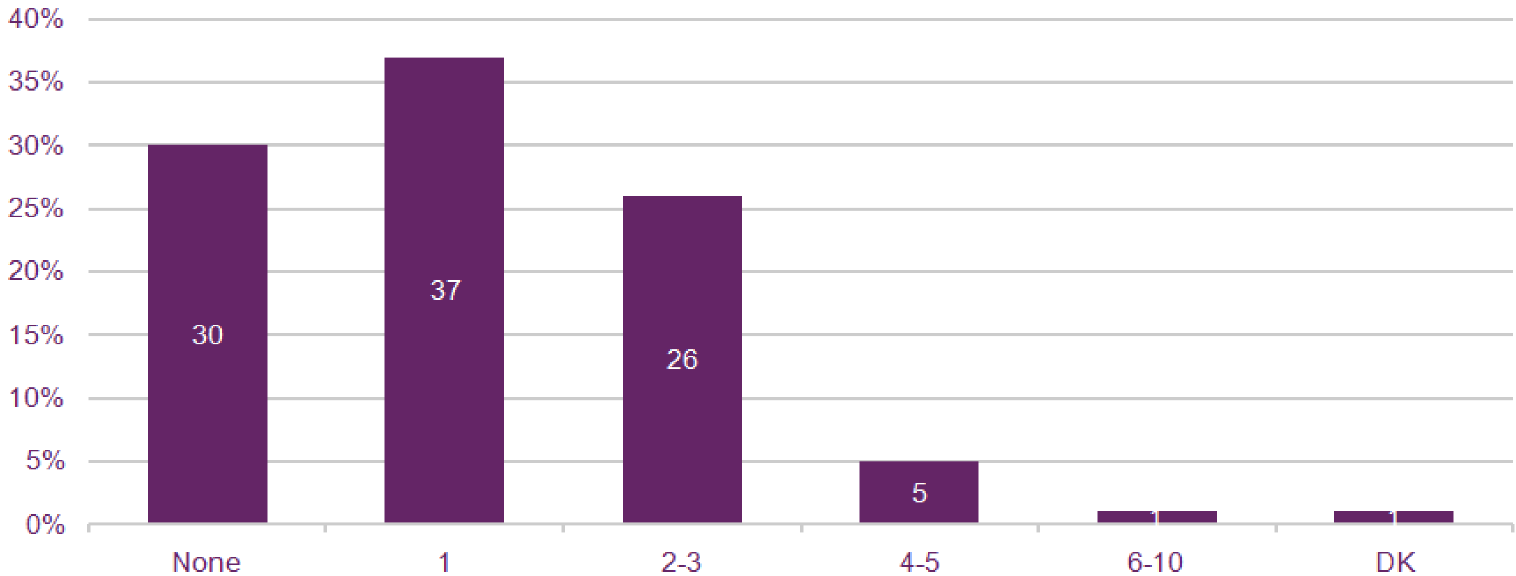
Figure 9: The radio set universe and frequency of listening

	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 – 79m	73%	15% - 18%
Vehicle radios[2]	34m	92%	1%
Total	**100m – 113m**	**83%**	**11%-12%**

Source: Ofcom research on home radio ownership and vehicle figures from the Department of 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 of Transport in December 2009
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 November 2008 and GfK retail sales data for 2000-2011.
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, March 2011 (12.1m devices).

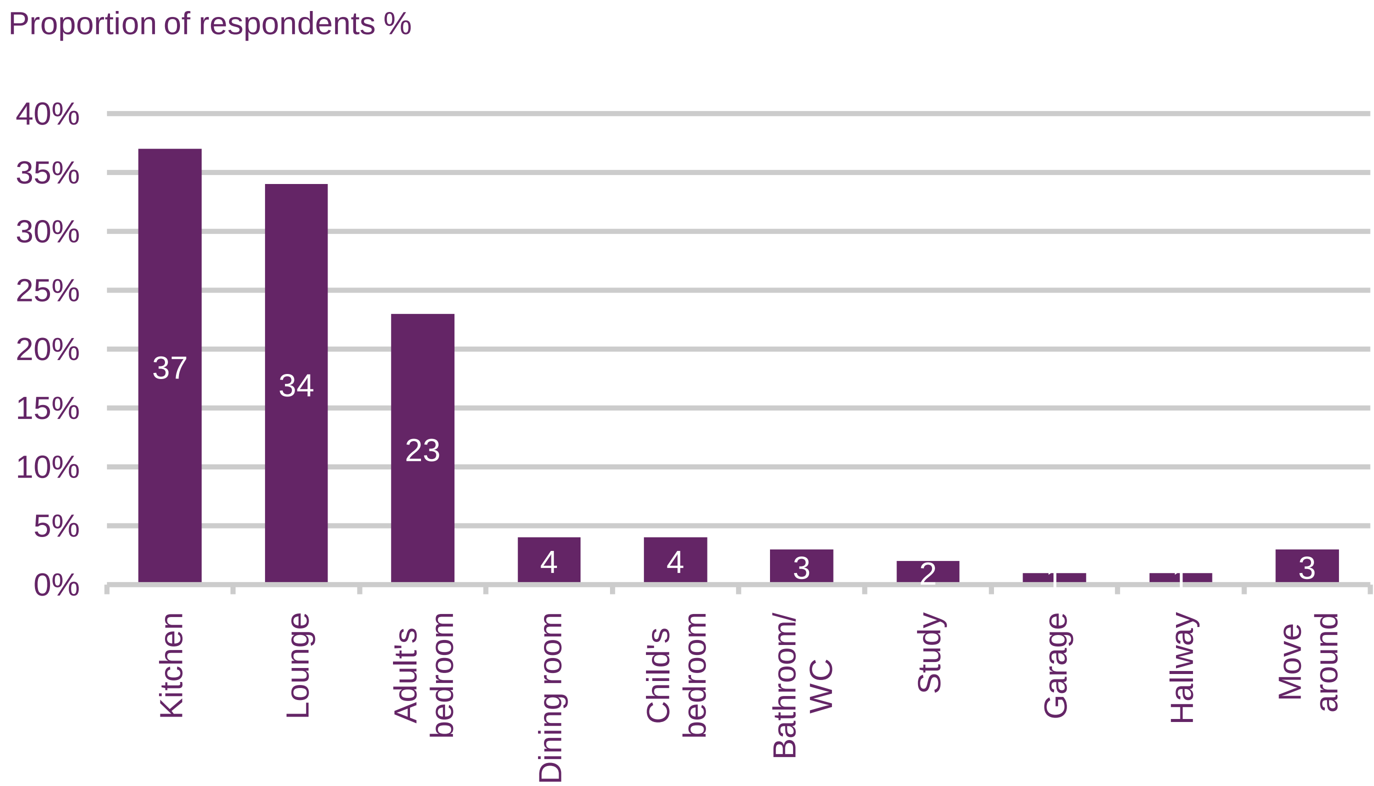
Figure 10: The number of sets that consumers listen to in 'most weeks'

Proportion of respondents %



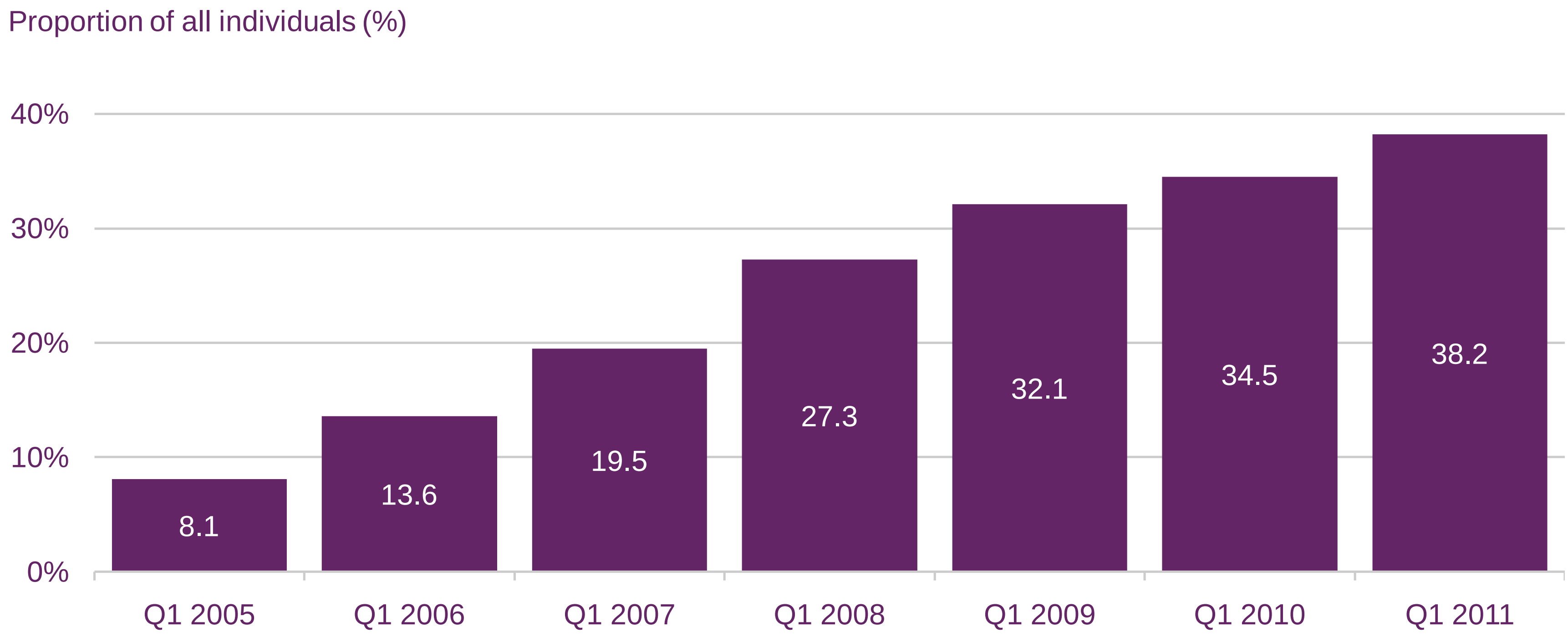
QP5. In total, how many radio sets do you have in your home that you, or someone in your household listens to in most weeks?
Source: Ofcom research, Q1 2011
Base: All respondents, n=2281

Figure 11: The location of sets that are used in ‘most weeks’



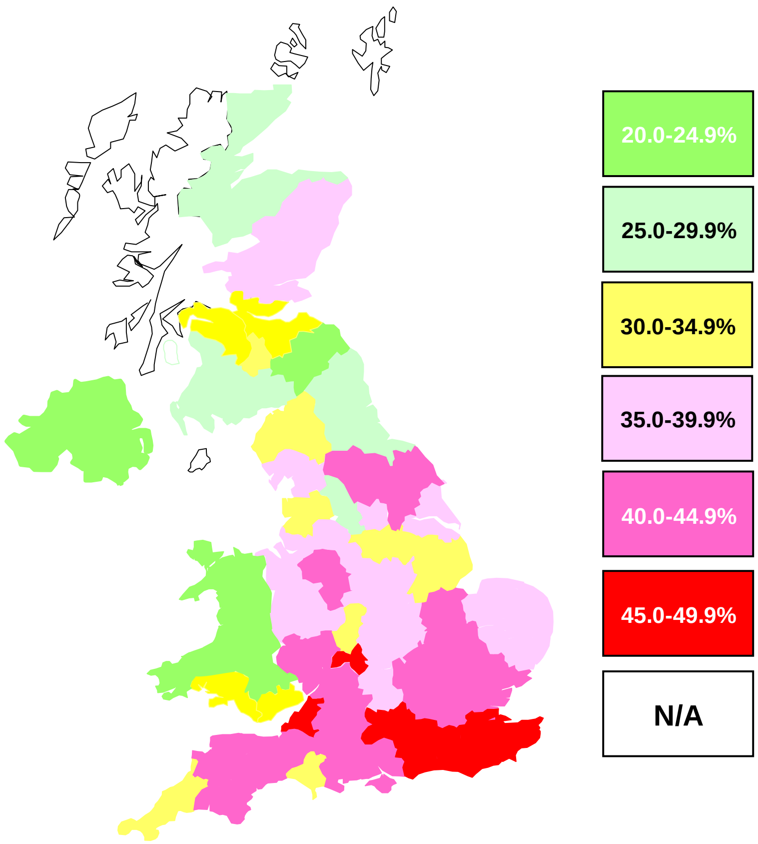
*Source:*Q4. How often, if at all, do you access the radio via…
Source: Ofcom Technology Tracker, Wave 1 2011
Base: All respondents, n=2281

Figure 12: Proportion of individuals claiming access to DAB in the home



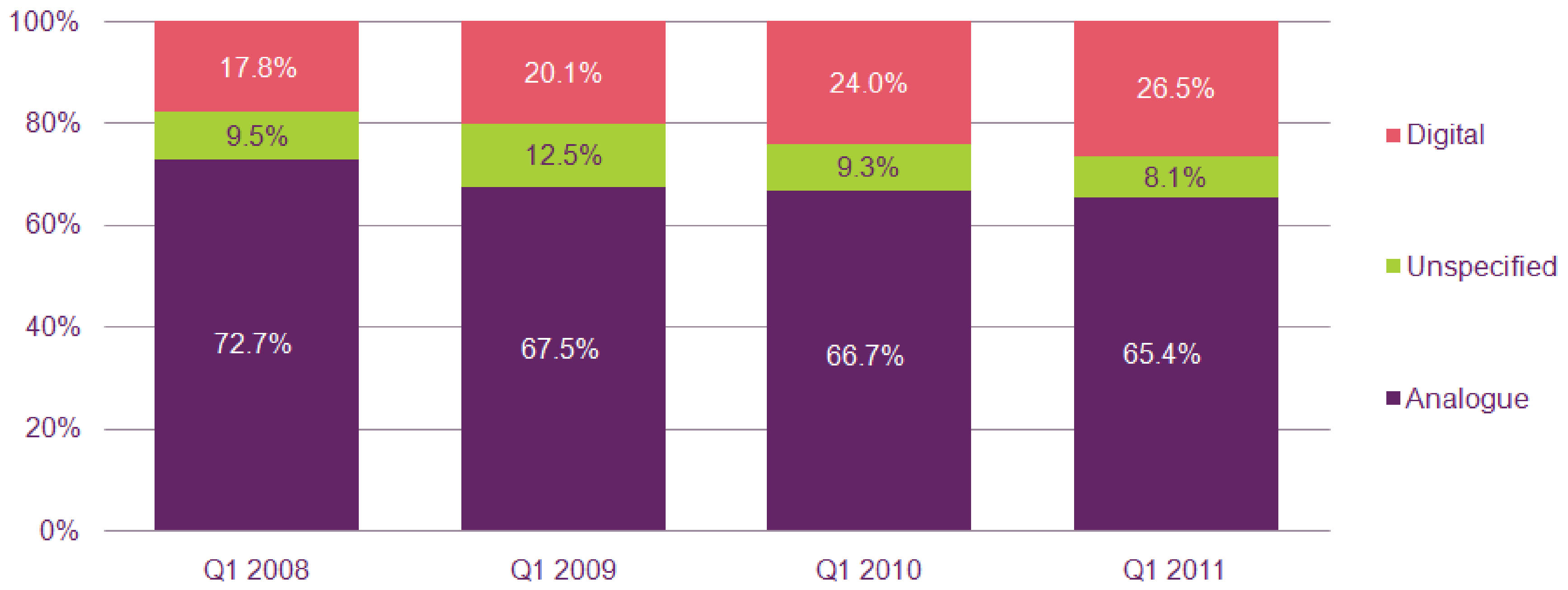
Source: RAJAR/ Ipsos MORI / RSMB

Figure 13: Take-up of DAB digital radio, by multiplex area



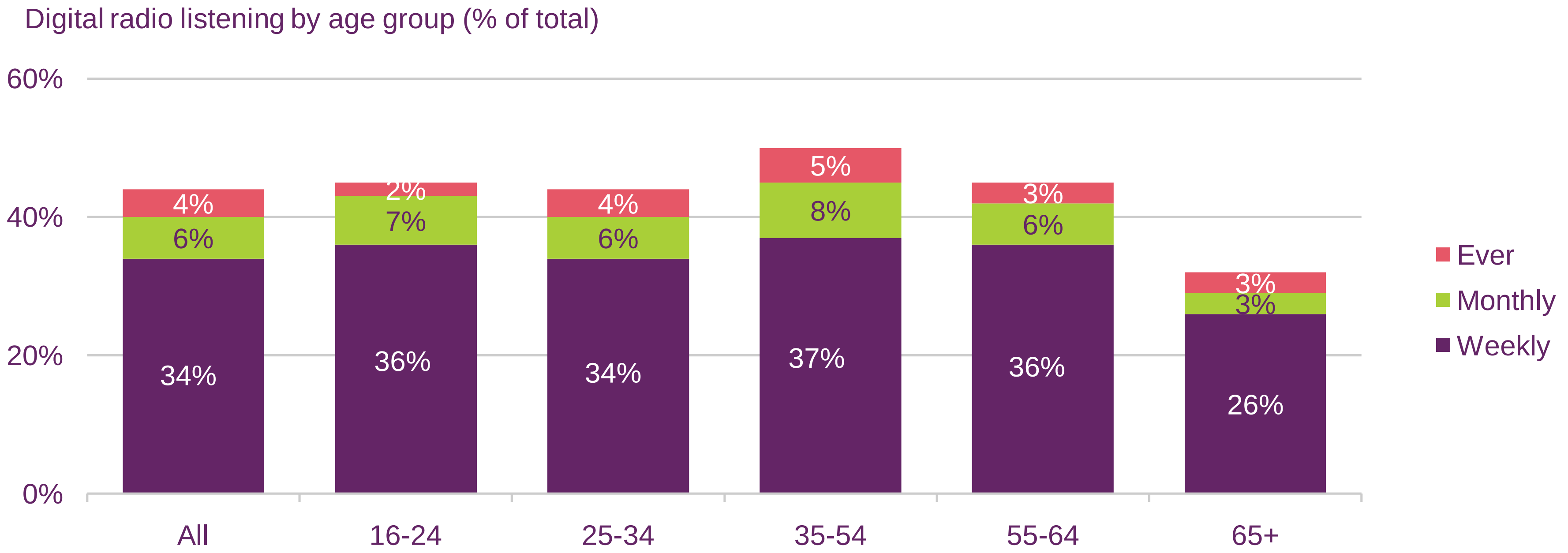
Source: RAJAR Q1 2011

Figure 14: Distribution of listening hours across analogue & digital platforms



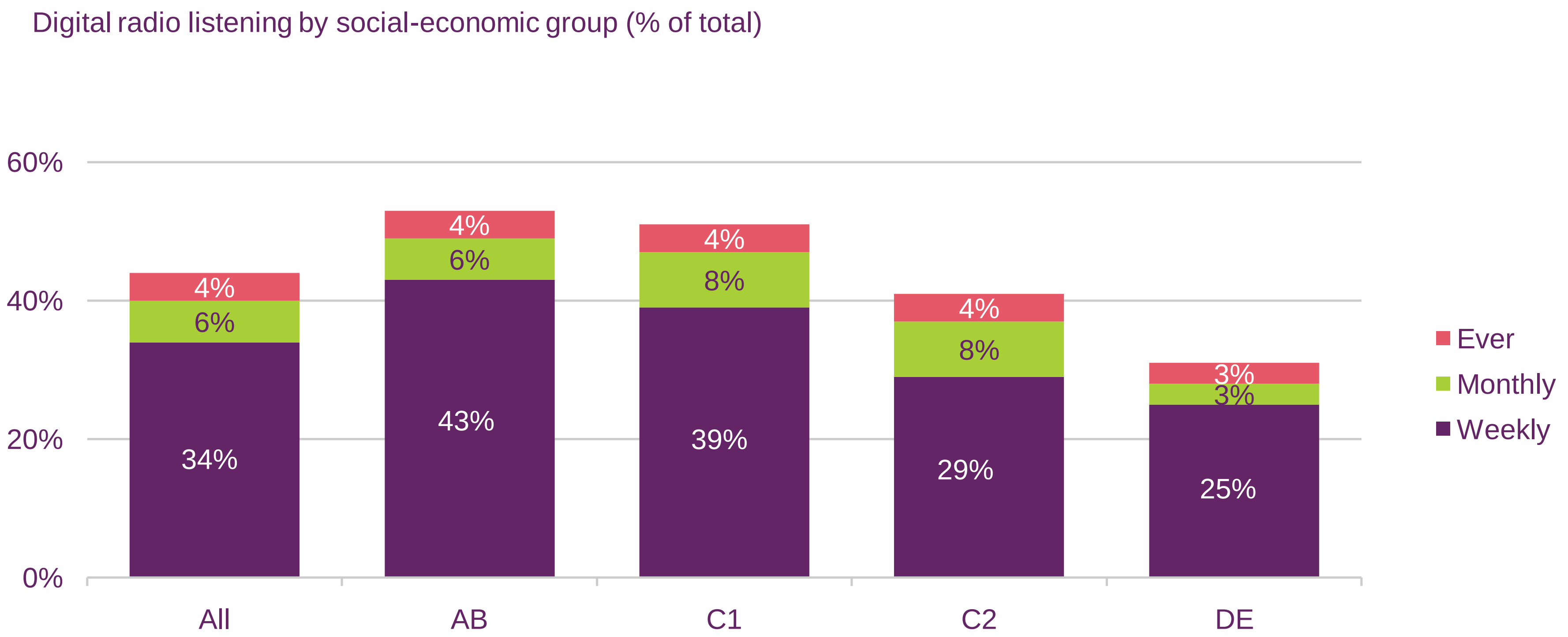
Source:RAJAR Ipsos MORI/ RSMB. All adults (15+), data relates to corresponding year ending each date shown. Note: Unspecified relates to listening where the radio platform was not confirmed by the listener

Figure 15: Proportion of people, by age, who have ever listened to radio through a digital platform



Source: Source: Ofcom research, Q1 2011
Base: All who listen to the radio (n=7017)
Q: Whether ever use digital radio

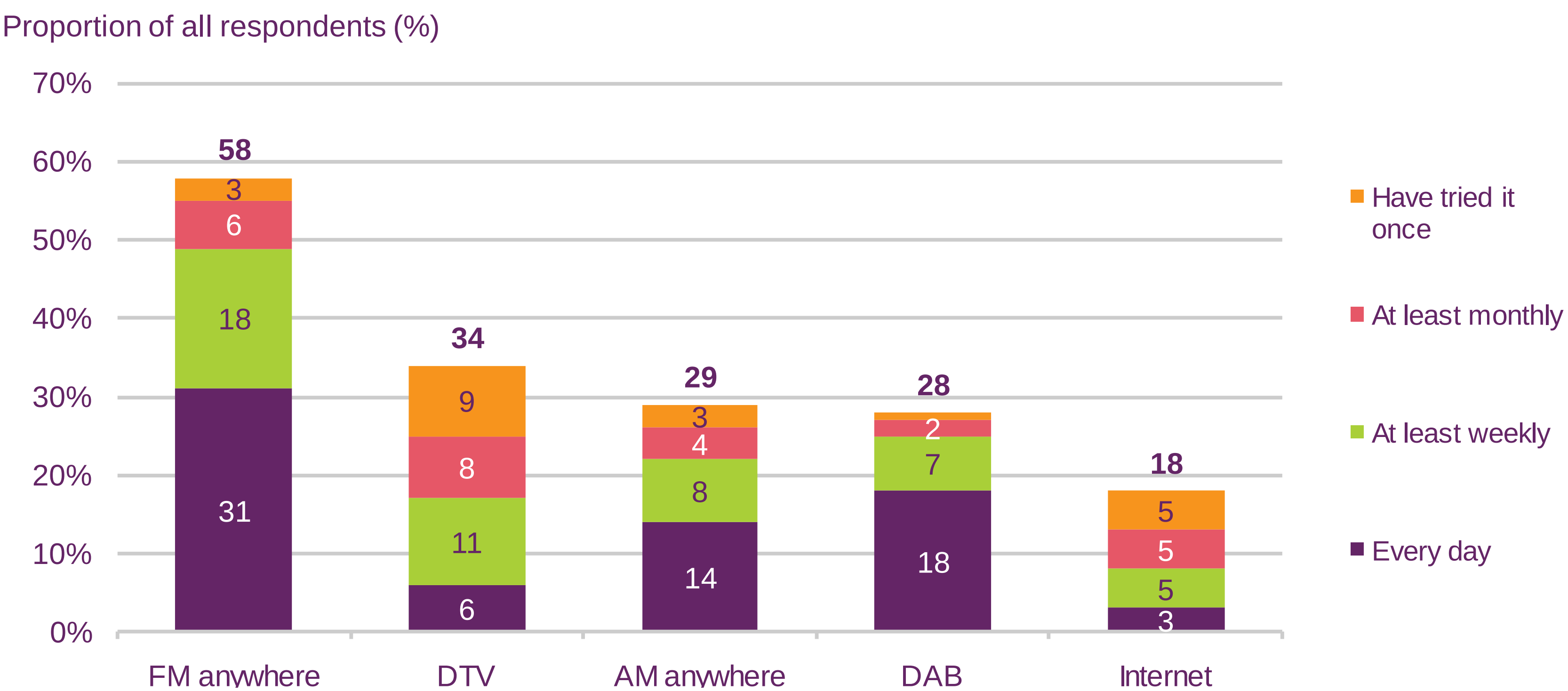
Figure 16: Those who listen to digital radio at least weekly



Source: Ofcom research, Q1 2011
Base: All who listen to the radio (n=7017)
Q: Whether use digit\al radio at least weekly

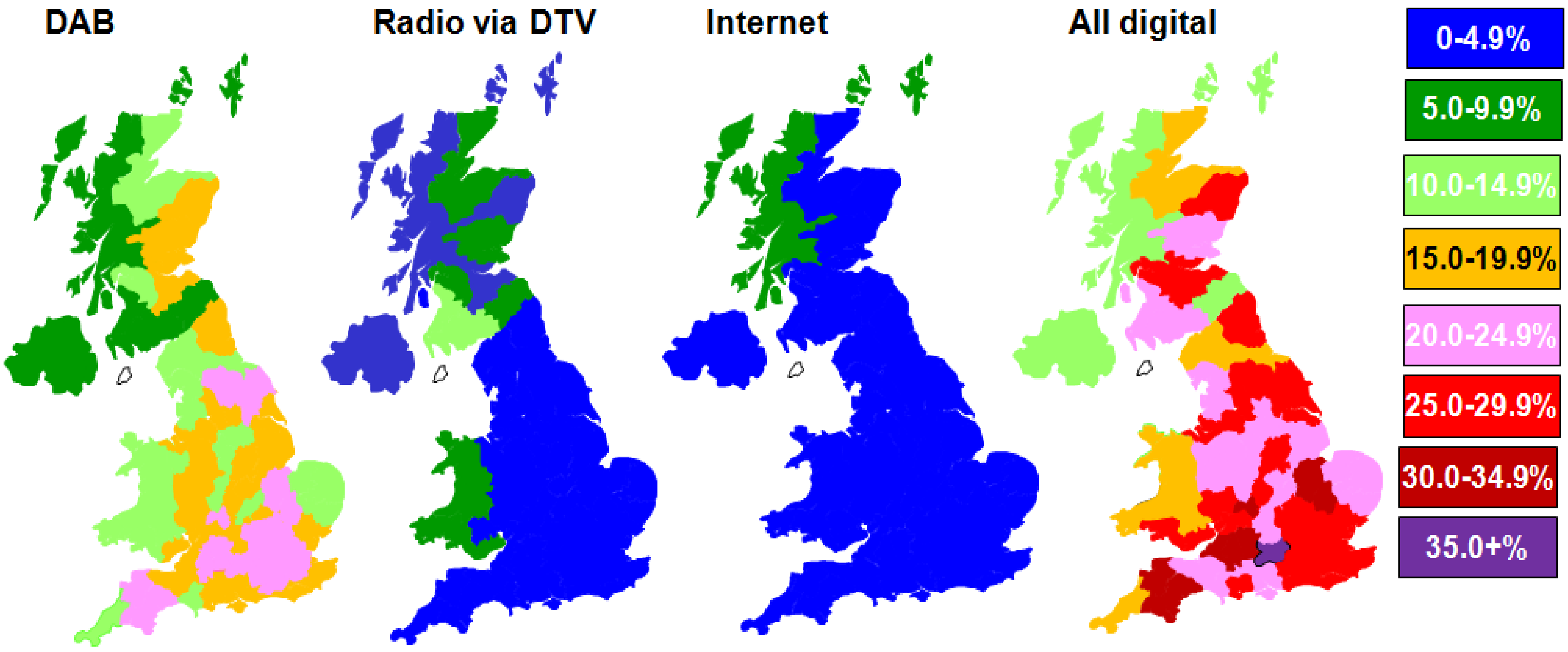
Q4. How often, if at all, do you access the radio via…
Source: Ofcom research, Q1 2011
Base: Adults aged 16+ who listen to radio n = 2811 UK, 357 Scotland, 1629 England, 397 Wales, 428 Northern Ireland
Note: Remaining percentages are Don't know responses.

Figure 17: Those who listen to digital radio at least weekly



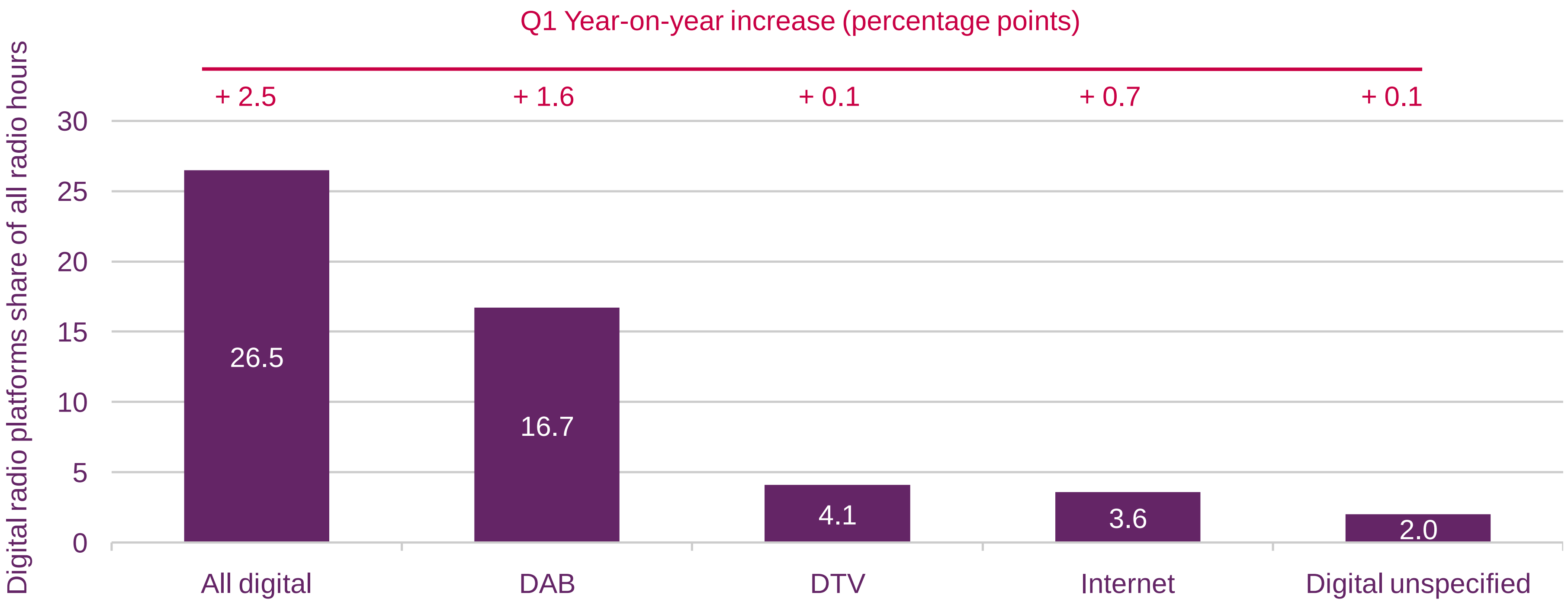
Q4. How often, if at all, do you access the radio via…
Source: Ofcom research, Q1 2011
Base: Adults aged 16+ who listen to radio n = 2811 UK, 357 Scotland, 1629 England, 397 Wales, 428 Northern Ireland
Note: Remaining percentages are Don't know responses.

Figure 18: Share of digital listening, by platform and area



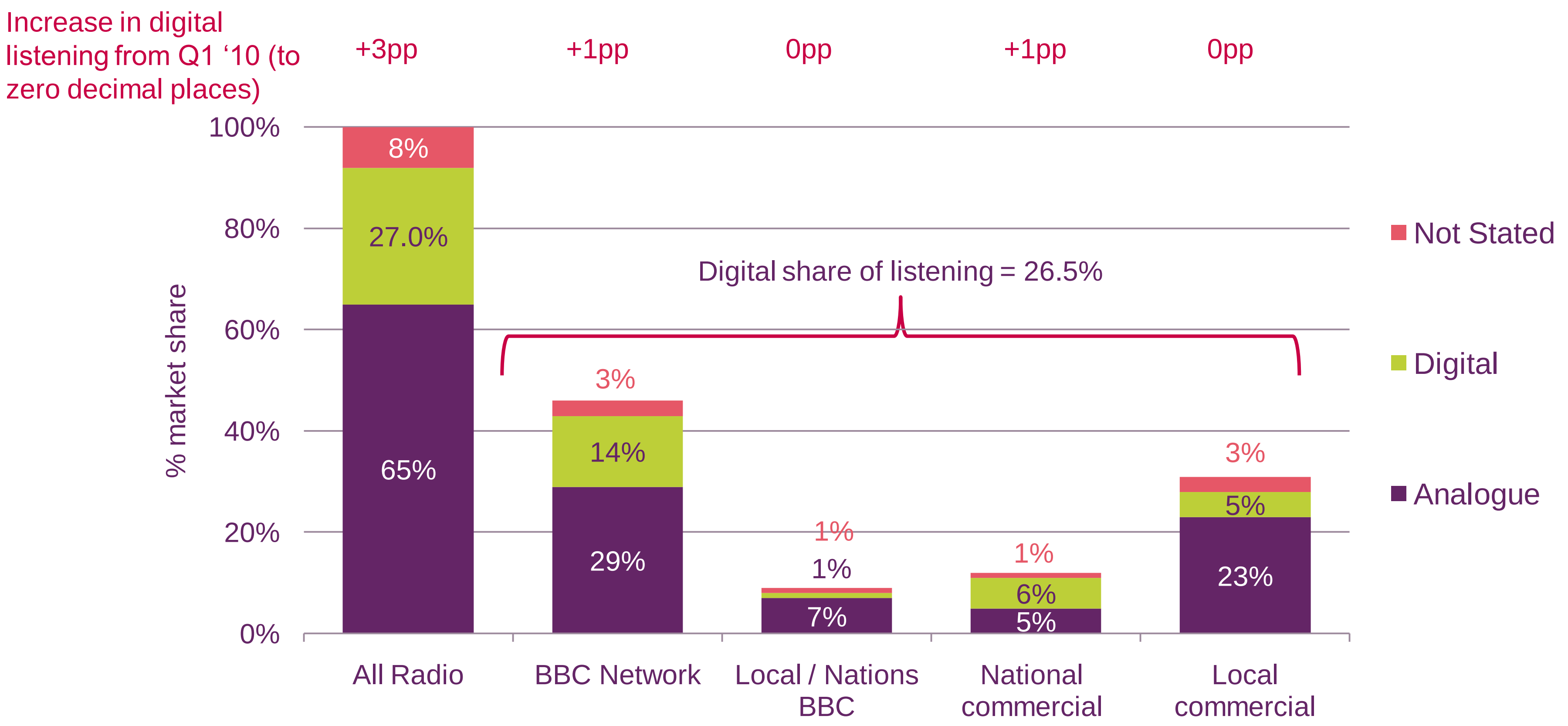
Source: RAJAR / Octagon, Q1 2011

Figure 19: Digital radio's share of total radio audience



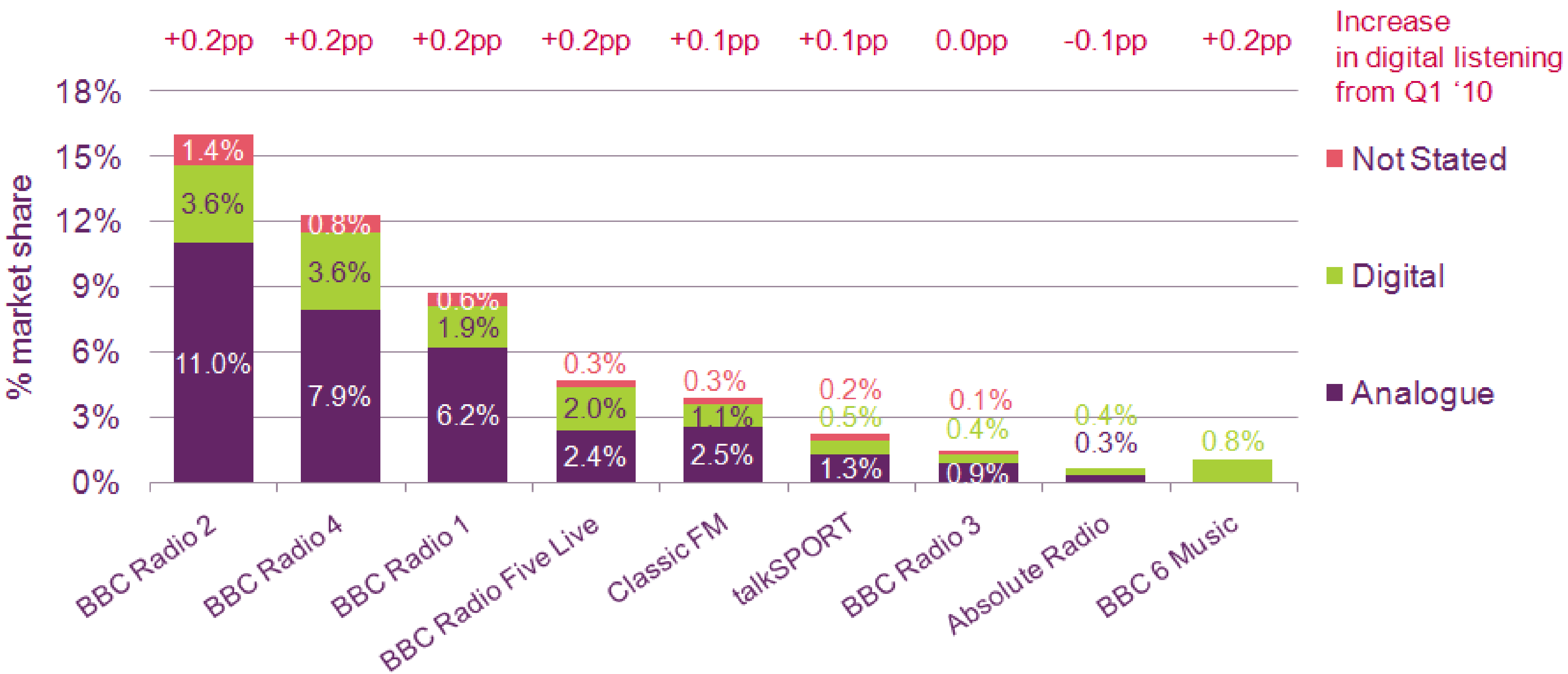
Source: RAJAR , all adults (15+), Q1 2011
Note: 'Digital unspecified' relates to listening to digital-only stations, where the survey respondent has not specified the listening platform used.

Figure 20: Distribution of listener hours, by service provider, between analogue and digital platforms, year end Q1 2011



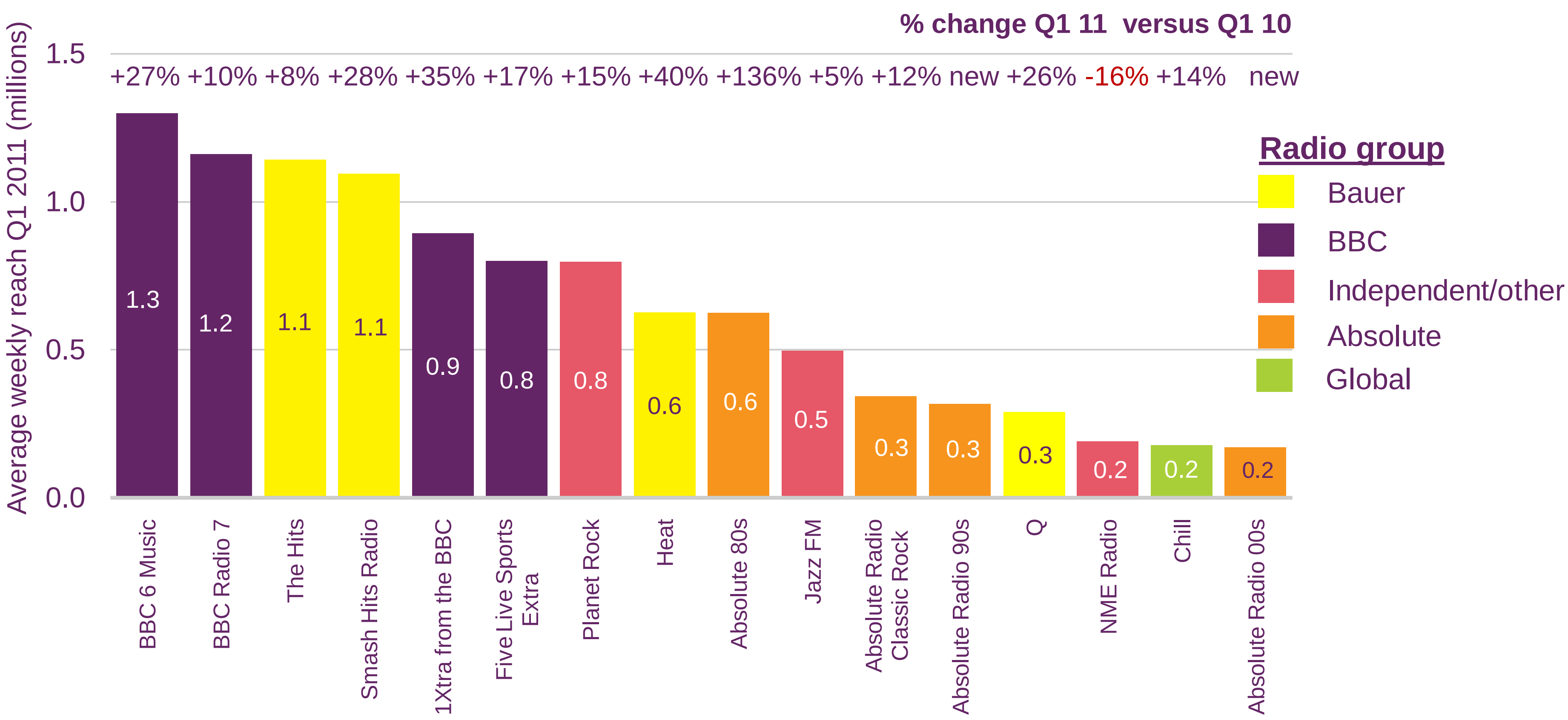
Source: RAJAR , all adults (15+), quarter ending Q1 2011

Figure 21: Distribution of listener hours, by service, between analogue and digital platform, Q1 2011



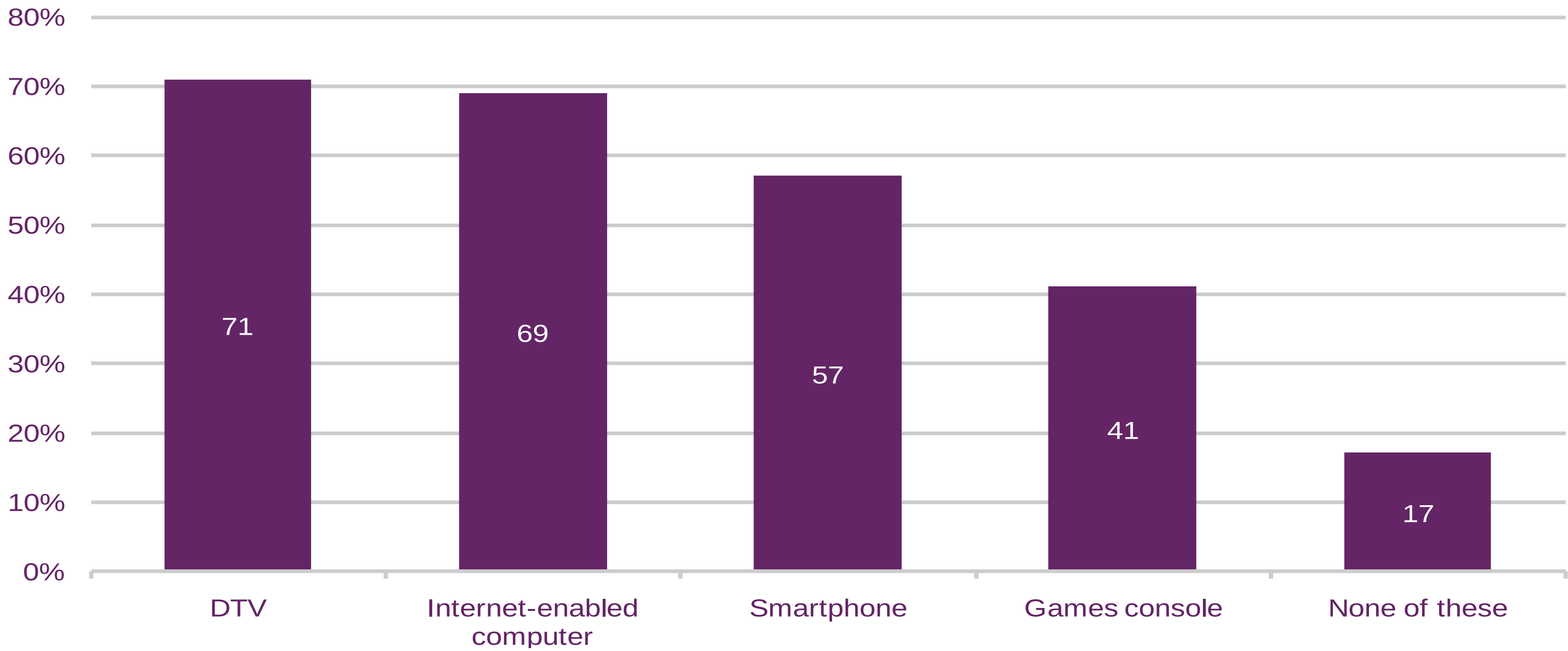
Source: RAJAR, all adults (15+), quarter ending Q1 2011

Figure 22: Most listened-to digital only stations, Q1 2011



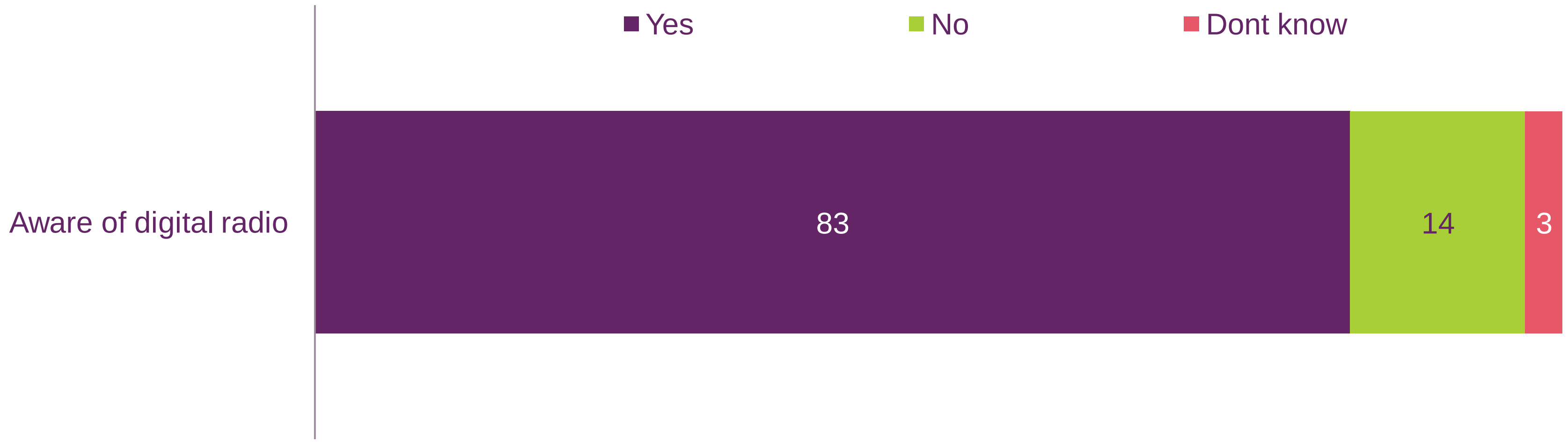
Source: RAJAR, all adults (15+), quarter ending Q1 2011

Figure 23: Awareness of devices capable of receiving digital radio services



Q. Before today, were you aware that you can listen to radio programmes as they are broadcast in these ways?
Source: Ofcom Technology Tracker, Wave 1 2011
Base: All respondents, n=2281
Awareness of 'Digital radios, sometimes called D-A-B radios' stood at 83% in Q1 2011

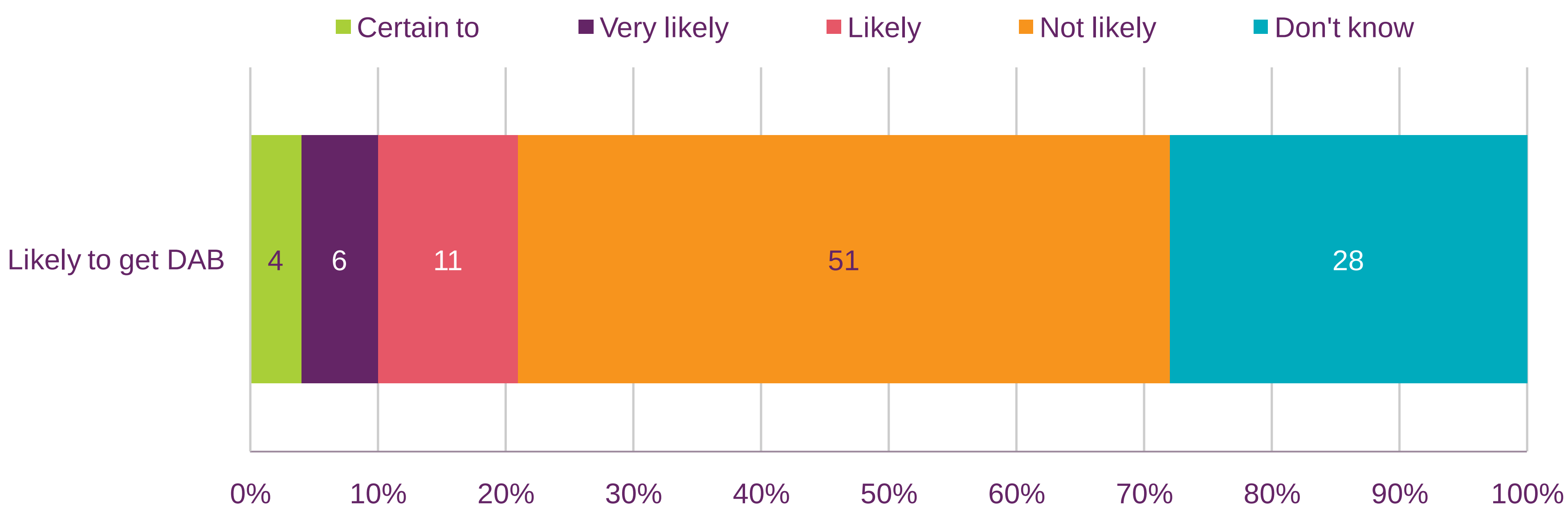
Figure 24: Awareness of digital radios sometimes called 'DAB digital radio', Q1 2011



Source: Ofcom Technology Tracker, Wave 1 2011
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.

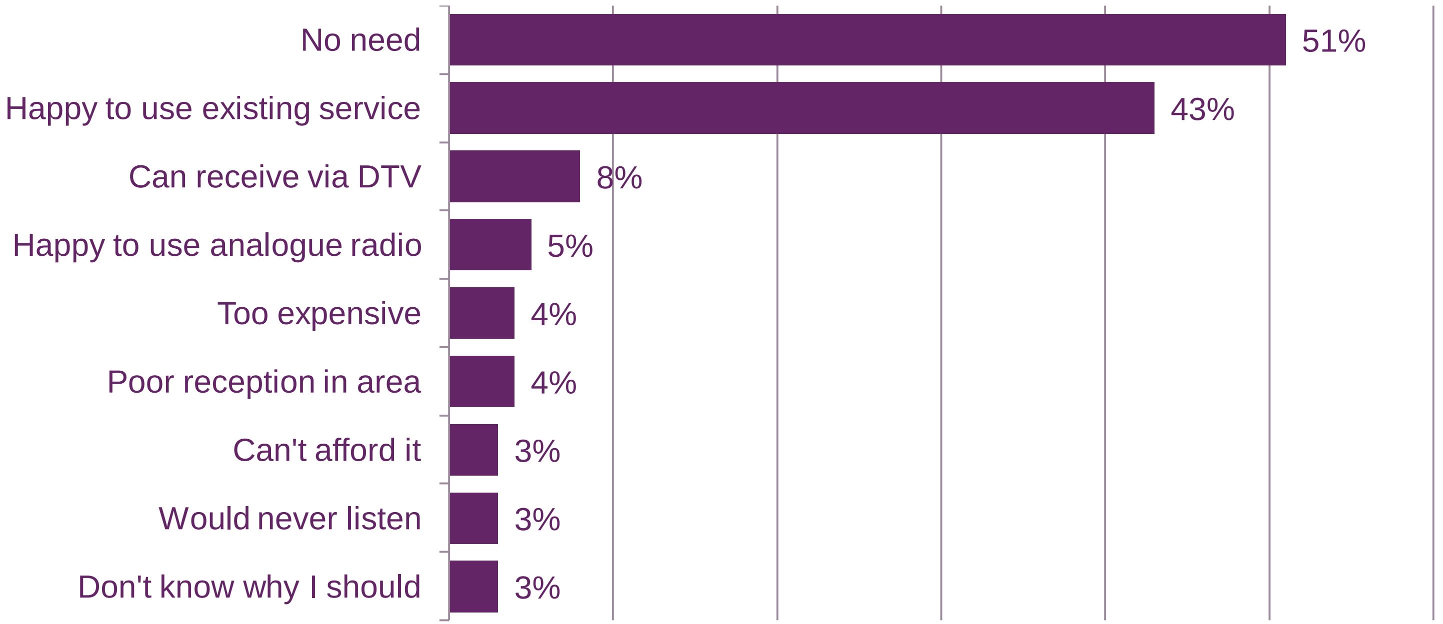
Figure 25: Likelihood to purchase a DAB set, Q1 2011

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, Q1 2011
Base: Those who listen to the radio but have no DAB sets in the home (n=1304)
QP12: How likely is it that your household will get a DAB radio in the next 12 months?

Figure 26: Reasons for not acquiring a DAB digital radio set, Q1 2011



Source: Ofcom research, Q1 2011
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?