

International Communications Market Report 2013 – Radio and audio

12 December 2013

Figure 4.1

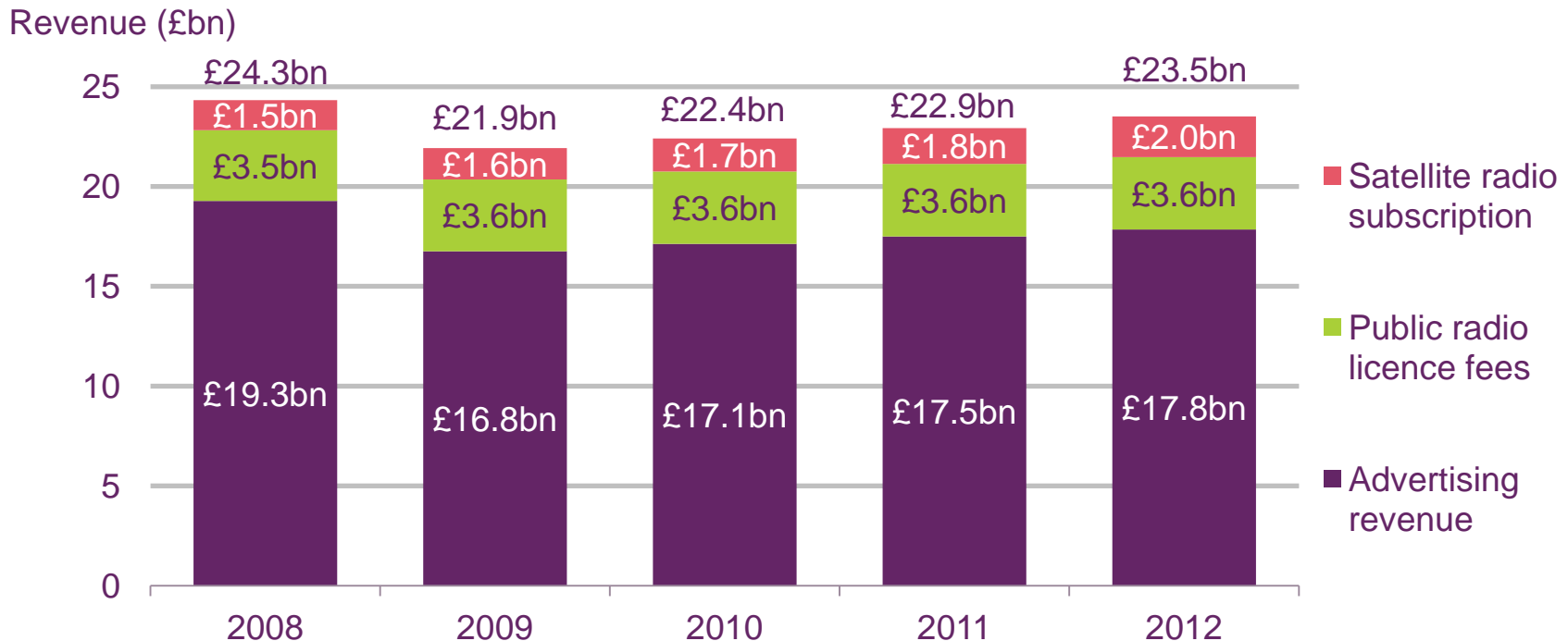
Key radio metrics: 2012

	UK	FRA	GER	ITA	USA	CAN	JPN	AUS	ESP	NED	SWE	IRL	POL	BRA	RUS	IND	CHN
Total industry revenue (£bn)	1.2	1.0	2.8	0.4	12.1	1.2	1.0	0.7	0.4	0.2	0.1	0.1	0.1	0.4	0.3	0.2	1.2
Revenue change (% , YOY)	+2.8	-0.5	-0.4	-8.2	+3.6	+3.1	-1.4	+0.5	-9.9	-1.9	+1.6	-4.2	-2.7	+6.7	+9.3	+17.3	+11.9
Revenues per capita (£)	18.9	15.9	34.9	6.6	38.3	35.3	7.7	31.5	8.2	14.0	13.2	21.3	3.0	2.0	1.9	0.2	0.9
% income from public licence fees	60.4	38.9	79.3	20.9	n/a	n/a	5.1	n/a	n/a	18.9	37.4	22.5	4.4	n/a	n/a	n/a	n/a

Source: Ofcom, Pricewaterhouse Coopers. All figures are nominal.

Figure 4.2

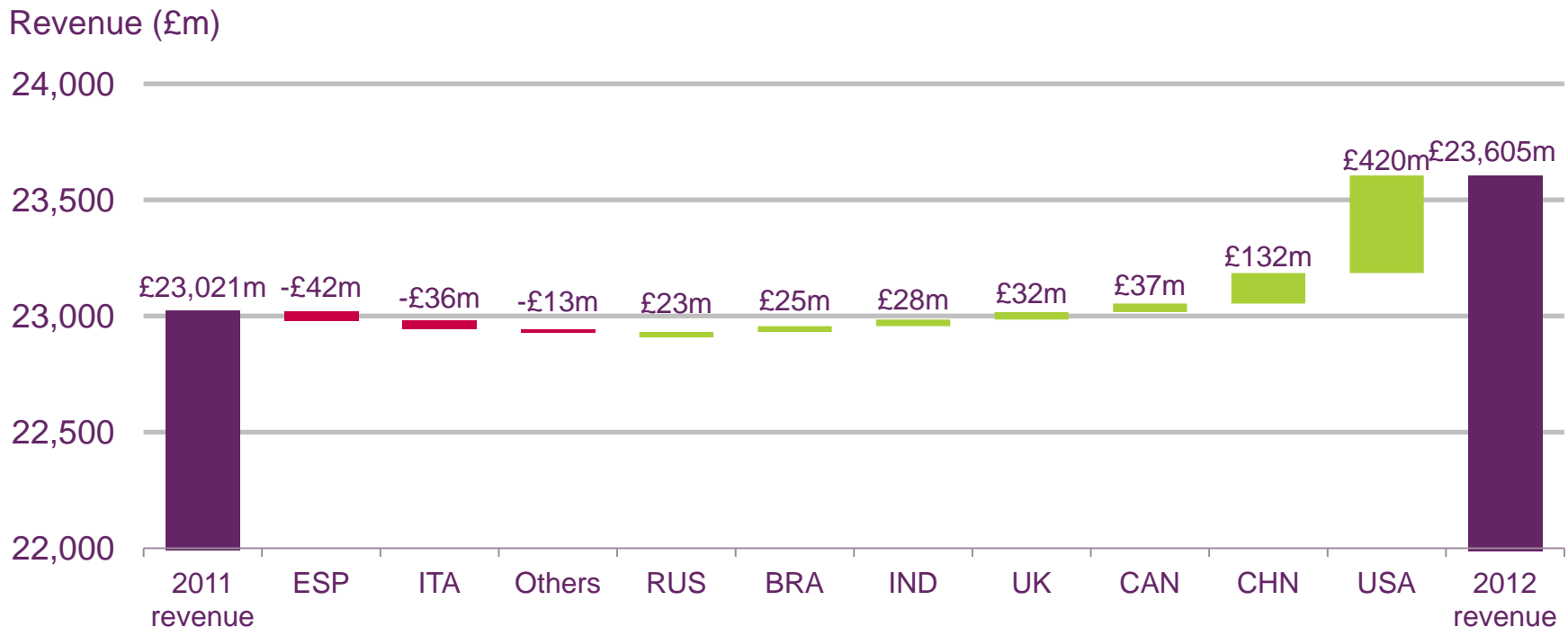
Total radio revenues for the 17 comparator countries



Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2013-2018 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.580 to the GBP, representing the IMF average for 2012. Note that the UK radio industry figure is sourced from broadcaster returns made to Ofcom.

Figure 4.3

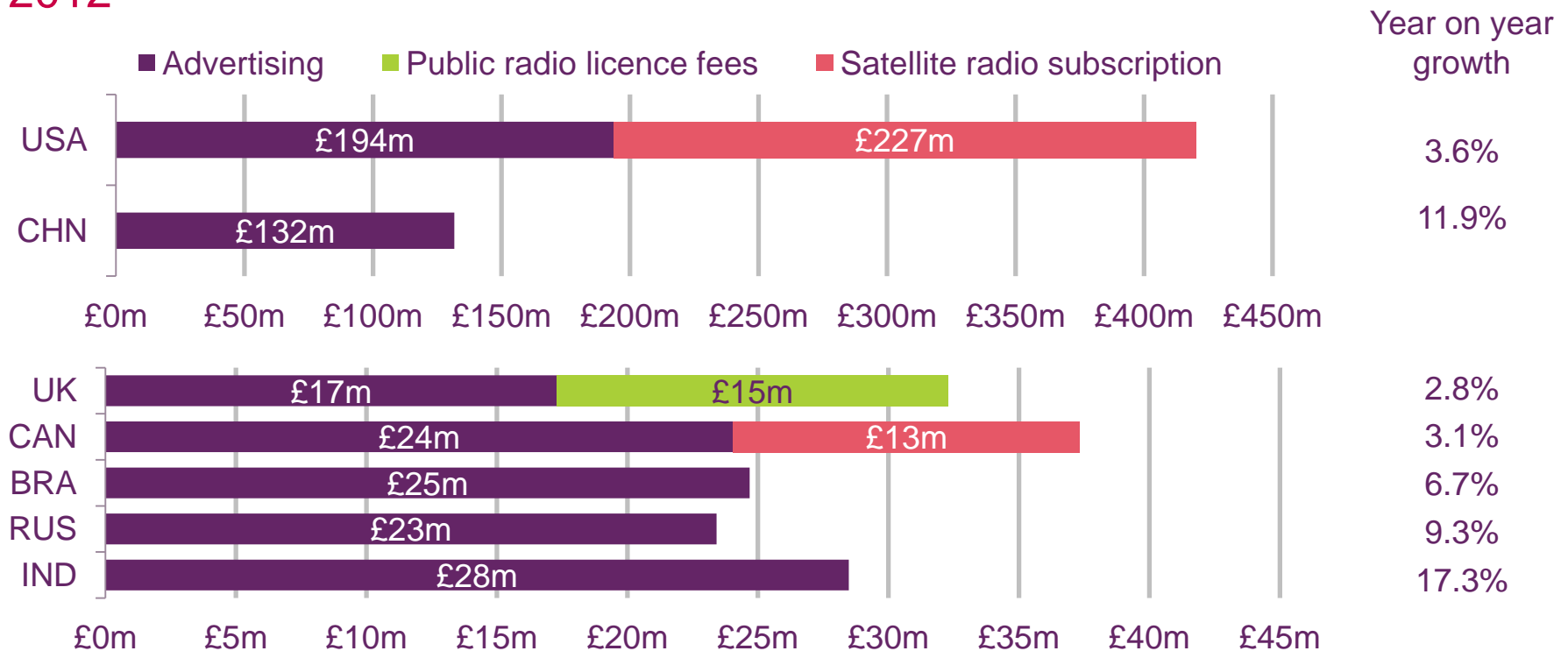
Changes in radio revenue, by country: 2011 and 2012



Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2013-2018 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.580 to the GBP, representing the IMF average for 2012. Note that the UK radio industry figure is sourced from broadcaster returns made to Ofcom.

Figure 4.4

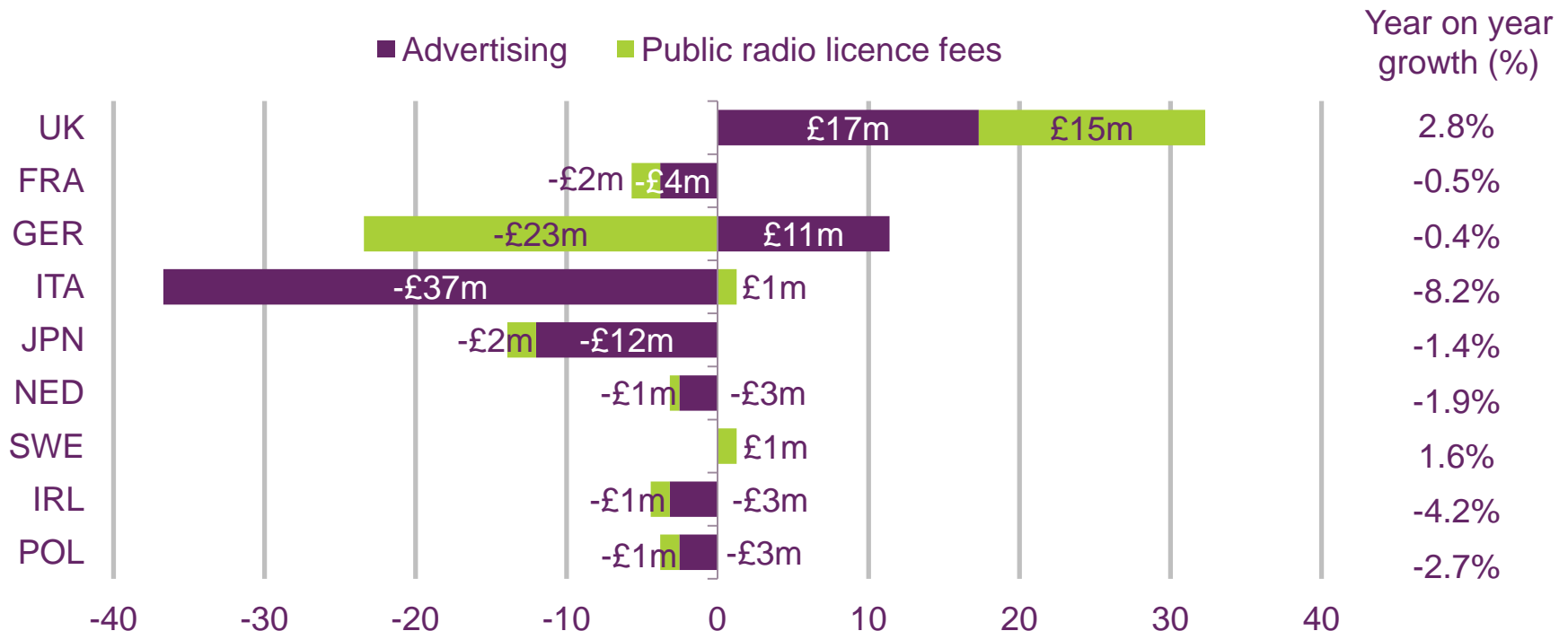
The most substantial increases in radio revenue, by component: 2011-2012



Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2013-2018 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.580 to the GBP, representing the IMF average for 2012. Note that the UK radio industry figure is sourced from broadcaster returns made to Ofcom.

Figure 4.5

Changes in radio revenue among comparator countries with licence fees, by component: 2011-2012

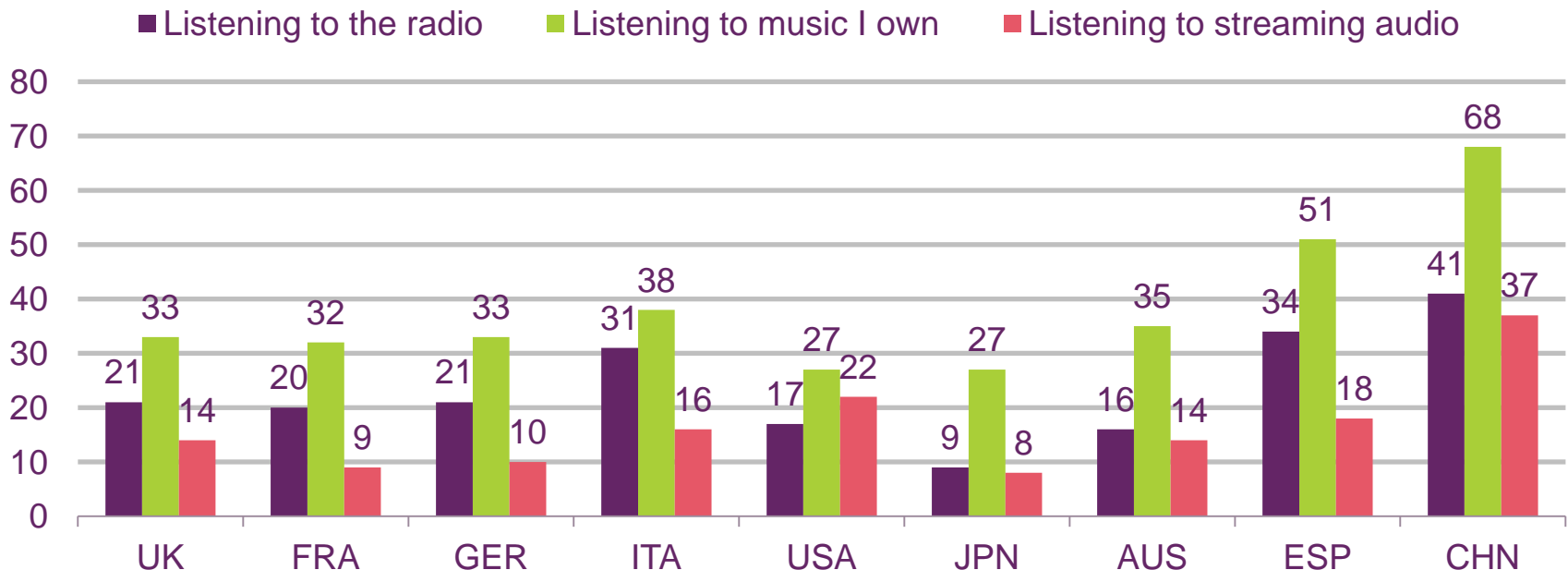


Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2013-2018 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.580 to the GBP, representing the IMF average for 2012. Note that the UK radio industry figure is sourced from broadcaster returns made to Ofcom.

Figure 4.6

Use of a smartphone / mobile phone to consume audio content

All respondents with a mobile phone/ smartphone (%)



Source: Ofcom consumer research September 2013

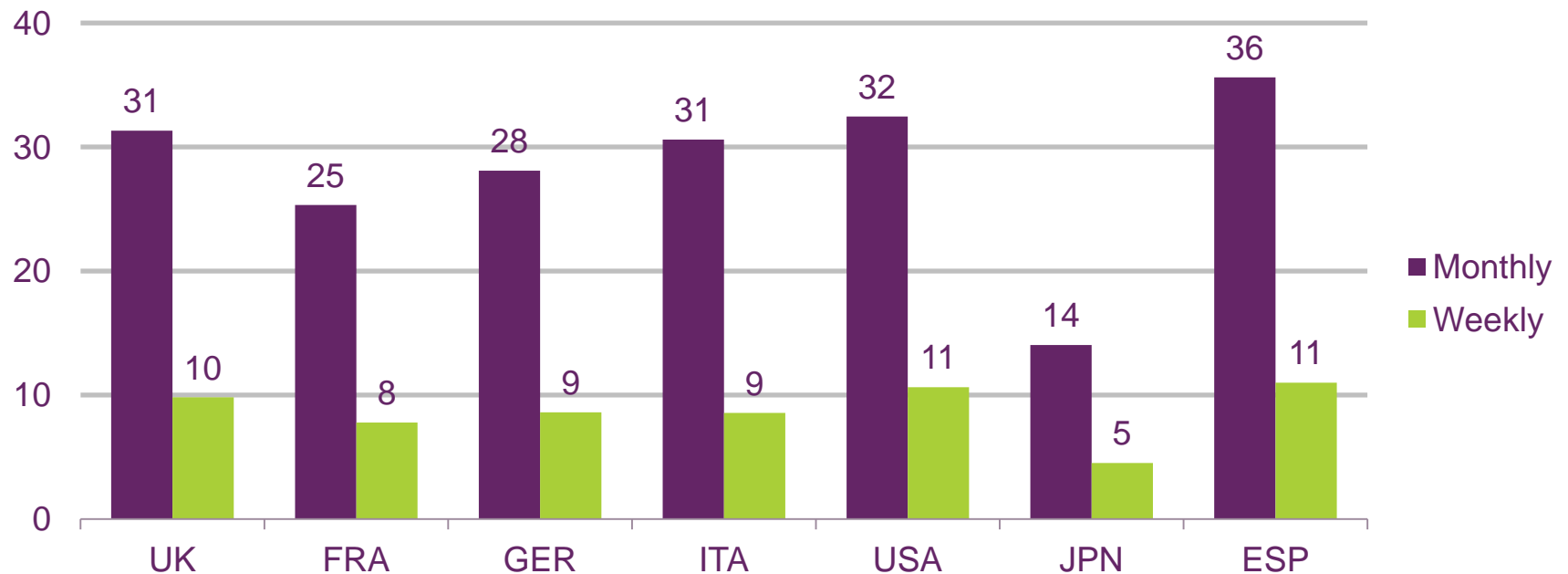
Base: All respondents with a mobile phone/ smartphone, UK=894, FRA=850, GER=890, ITA=904, USA=793, JPN=855, AUS=877, ESP=897, CHN=936.

Q.15d Which, if any, of the following audio activities do you use each of your devices for?

Figure 4.7

Frequency of listening to music on a mobile phone

Proportion of mobile phone users (%)

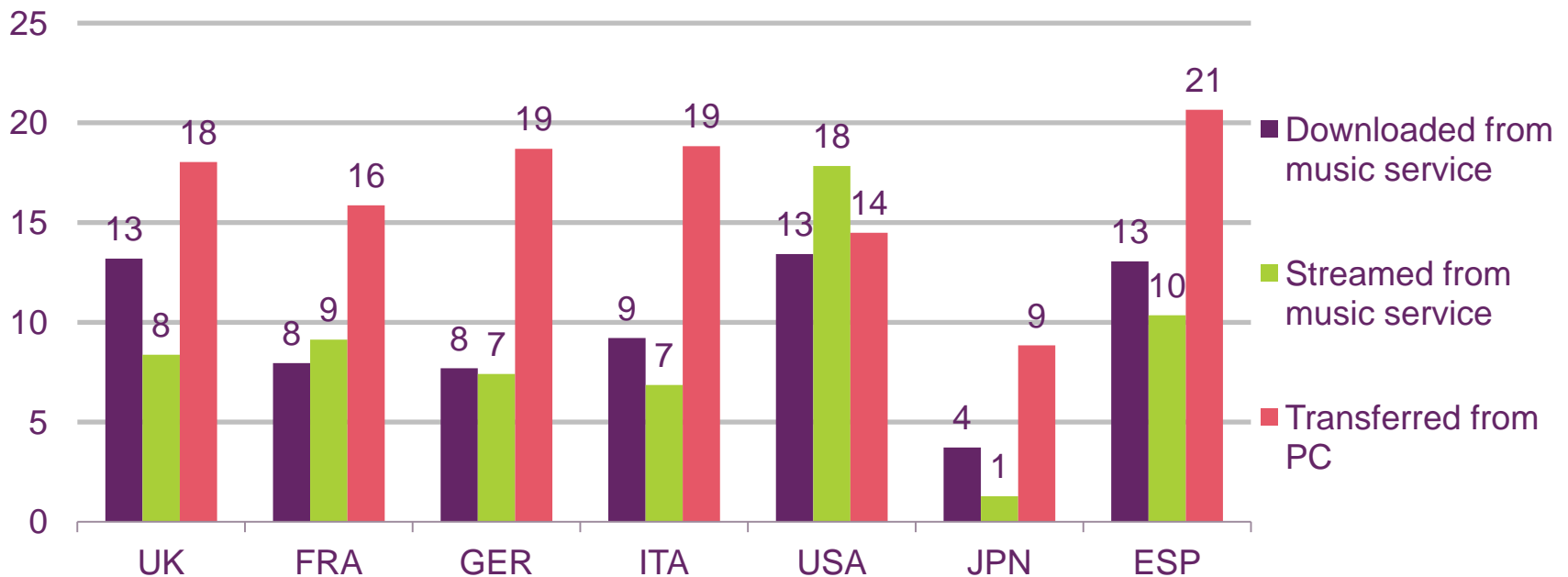


Source: comScore MobiLens, August 2013 (3 month average, mobile phone users 15+)

Figure 4.8

Source of music listened to on a mobile phone

Proportion of mobile phone users (%)

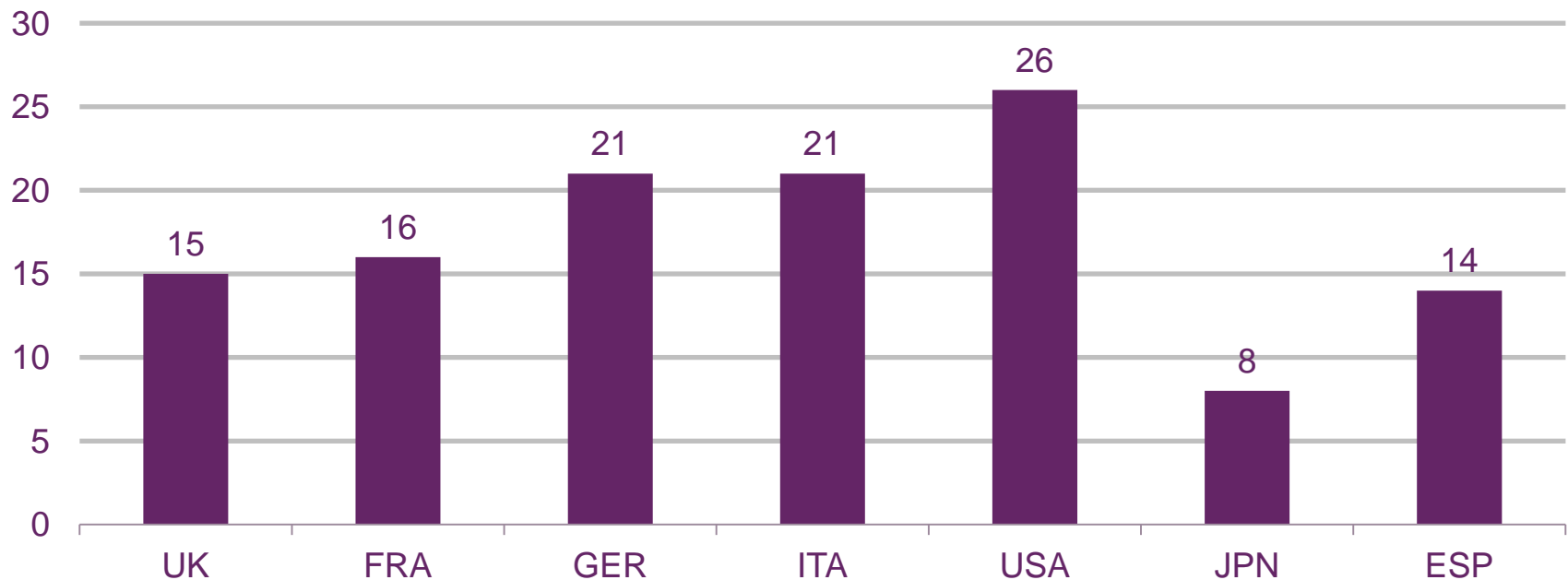


Source: comScore MobiLens, August 2013 (3 month average, mobile phone users 15+)

Figure 4.9

Number of music streaming services used by mobile internet users

Number of sources used

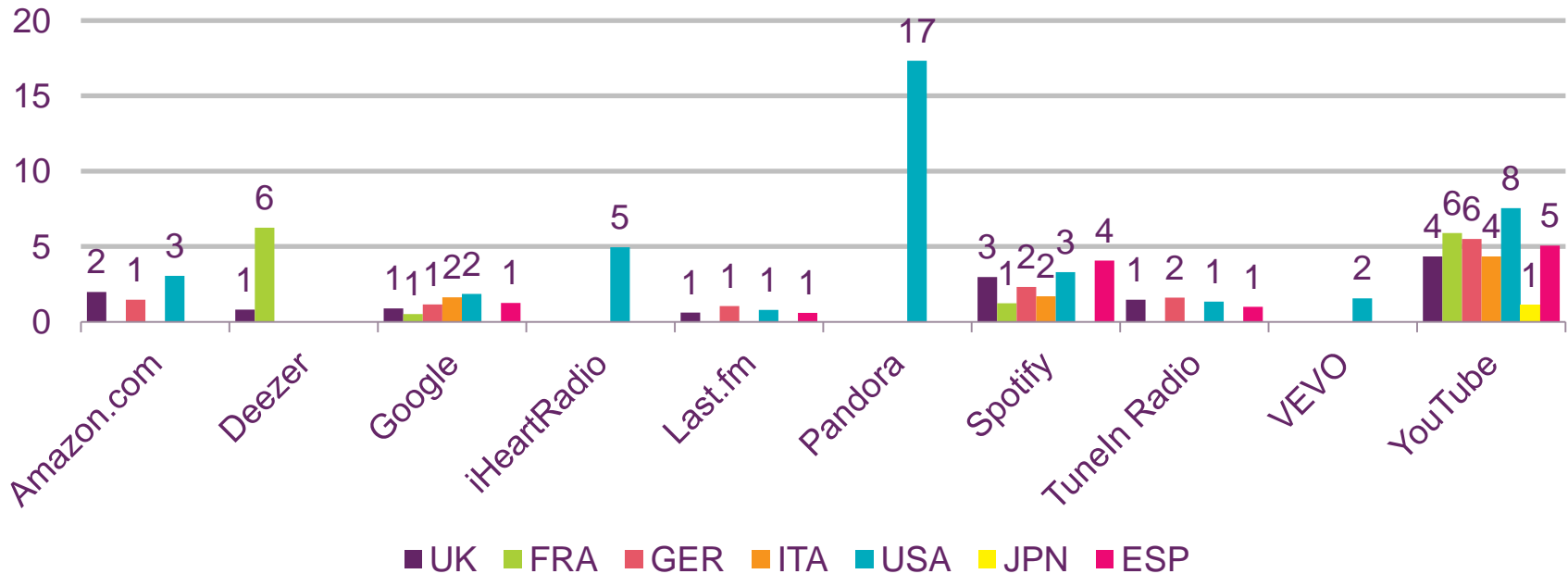


Source: comScore MobiLens, August 2013 (3 month average, mobile internet users 15+)

Figure 4.10

Sources used for streaming music content

Proportion of mobile internet users (%)

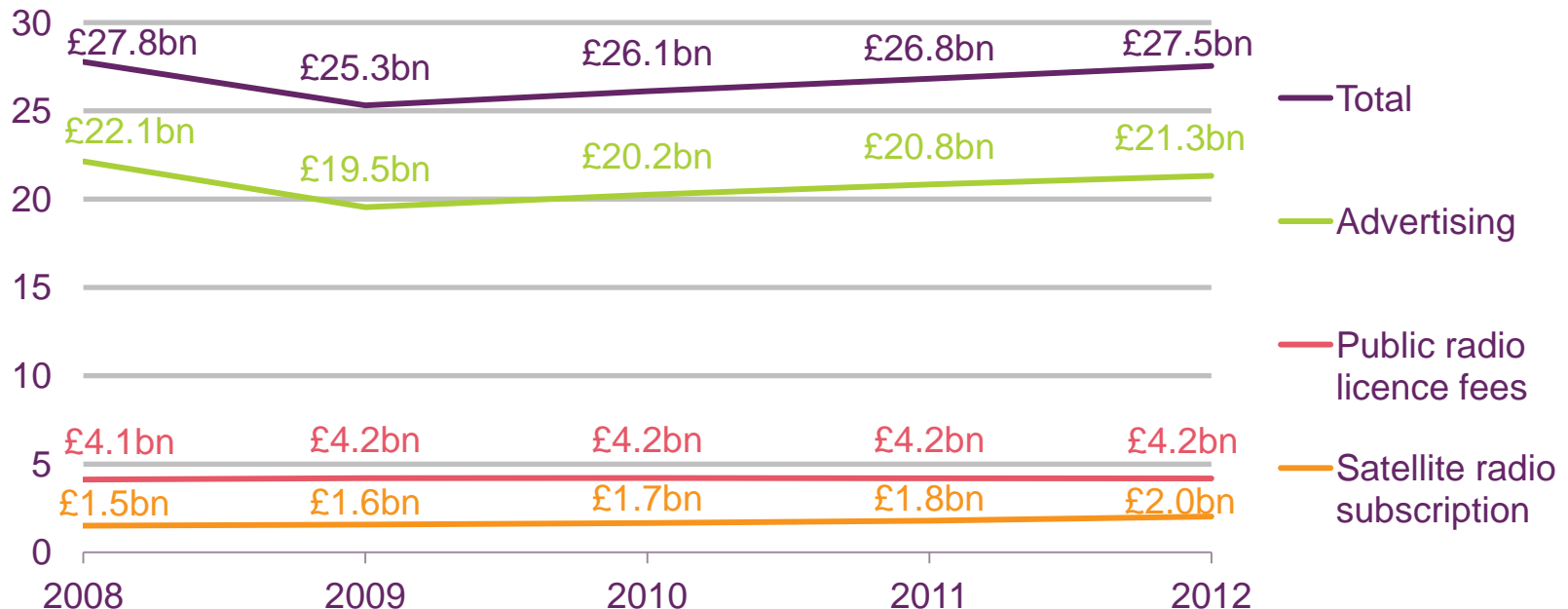


Source: comScore MobiLens, August 2013 (3 month average, mobile internet users 15+)

Figure 4.11

Worldwide industry revenues: 2008-2012

Revenue (£bn)



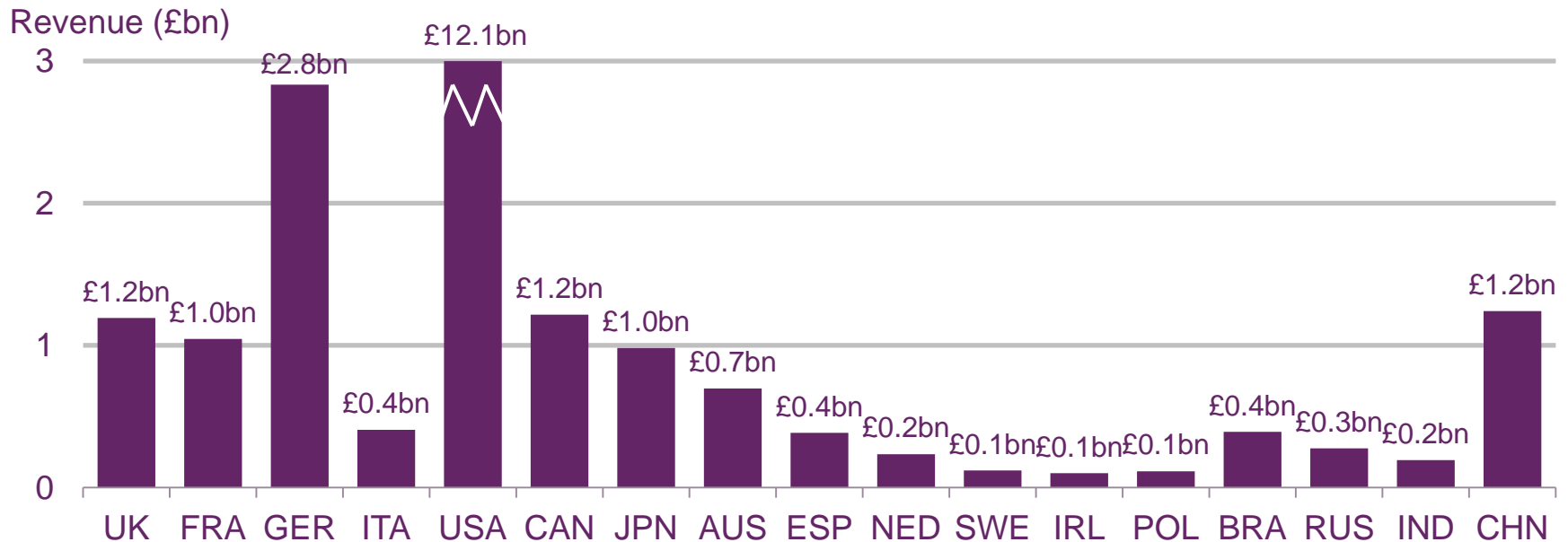
Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2013-2018 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.580 to the GBP, representing the IMF average for 2012.

Figure 4.12

Radio industry revenues: 2012

Year on year

change: 2.8% -0.5% -0.4% -8.2% 3.6% 3.1% -1.4% 0.5% -9.9% -1.9% 1.6% -4.2% -2.7% 6.7% 9.3% 17.3% 11.9%

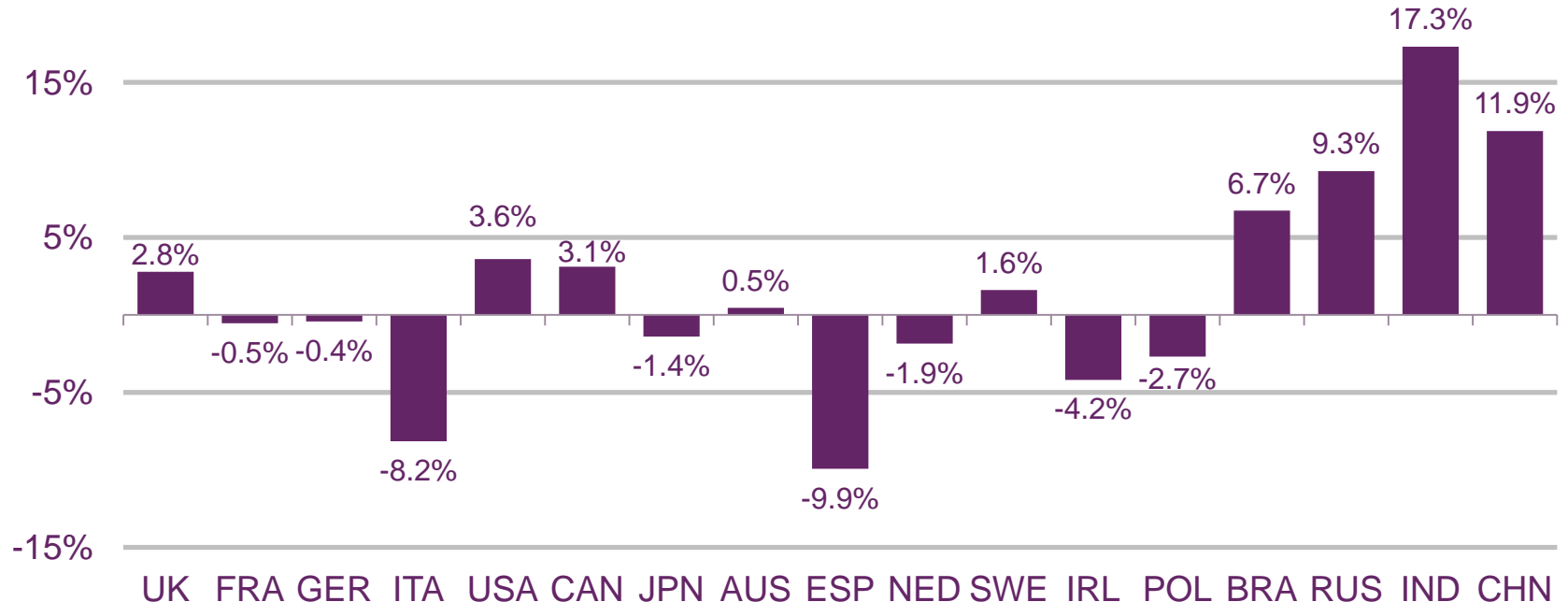


Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2013-2018 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.580 to the GBP, representing the IMF average for 2012. Note that the UK radio industry figure is sourced from broadcaster returns made to Ofcom.

Figure 4.13

Radio industry revenue annual growth: 2011-12

Annual growth (%)

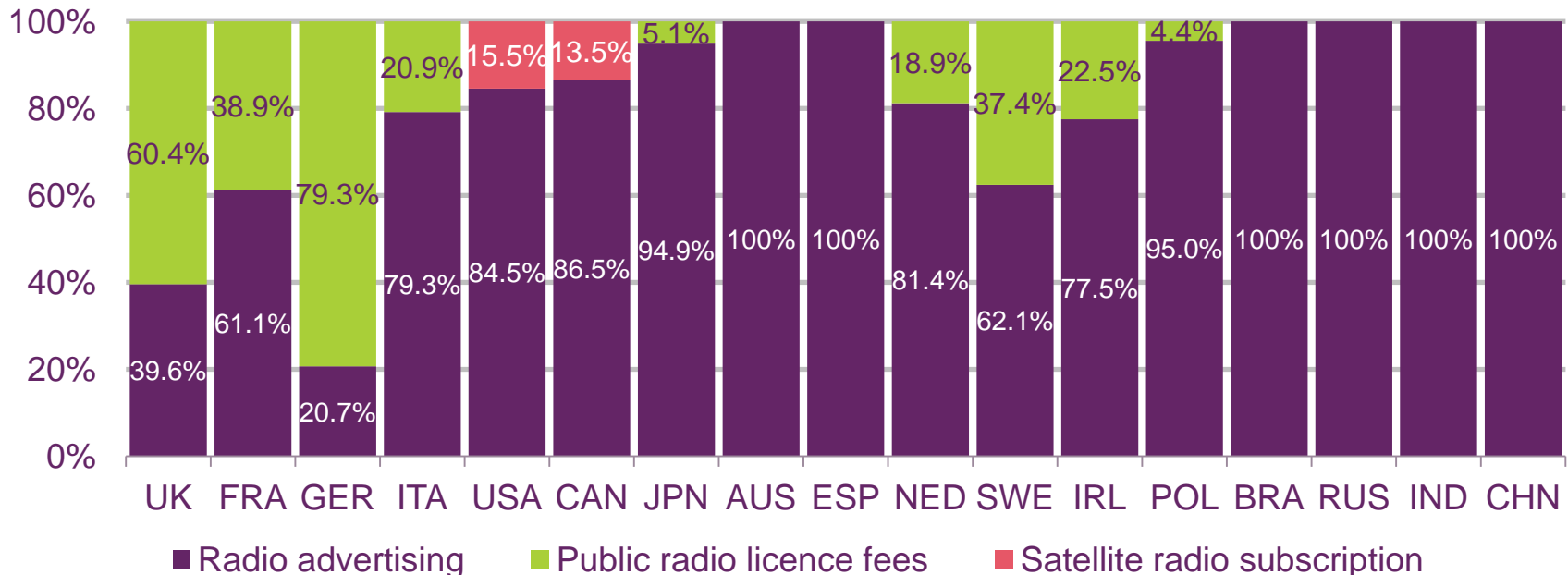


Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2013-2018 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.580 to the GBP, representing the IMF average for 2012. Note that the UK radio industry figure is sourced from broadcaster returns made to Ofcom.

Figure 4.14

Proportion of radio revenue, by source

Proportion of total revenue

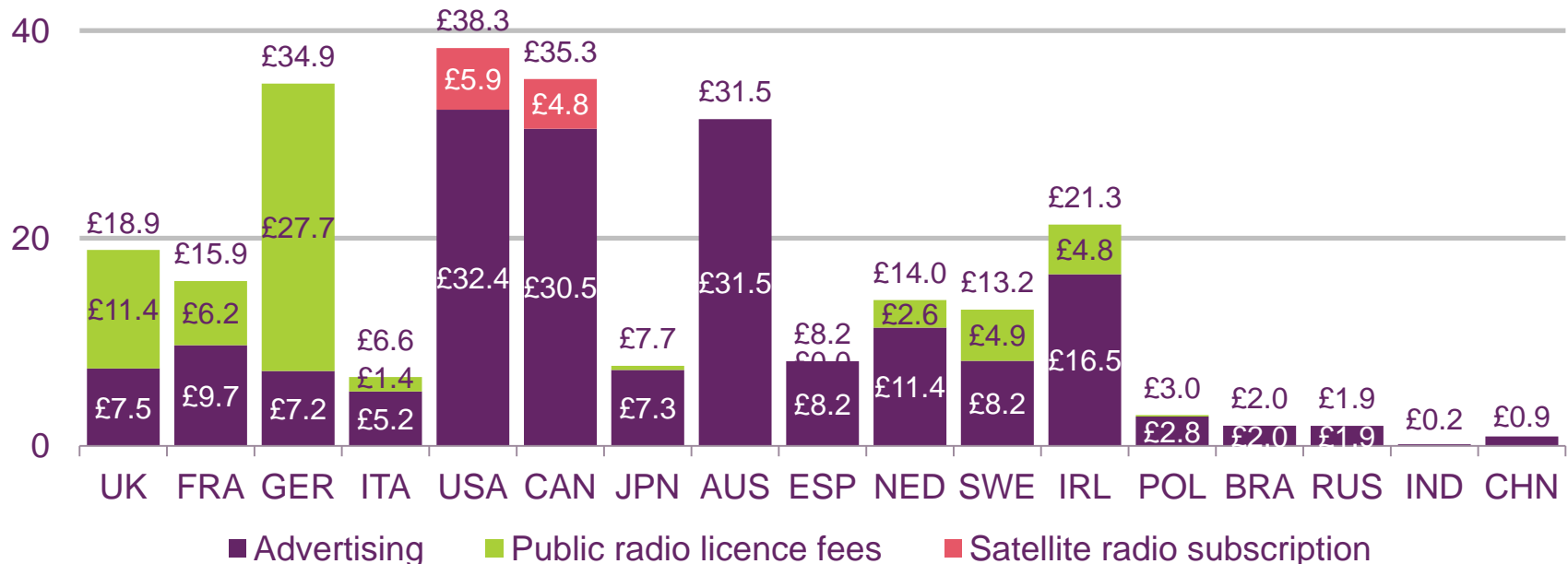


Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2013-2018 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.580 to the GBP, representing the IMF average for 2012. Note that the UK radio industry figure is sourced from broadcaster returns made to Ofcom.

Figure 4.15

Radio industry revenues, per head of population: 2012

£ per head (totals above bars)

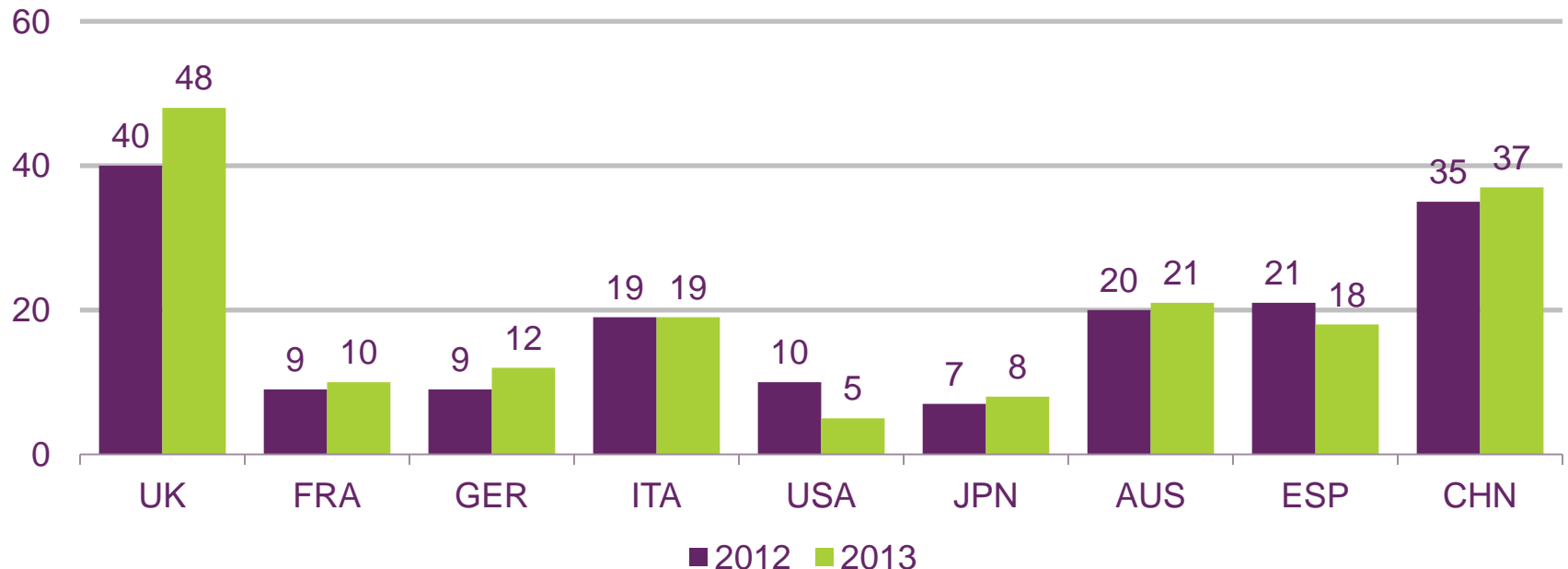


Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2013-2018 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.580 to the GBP, representing the IMF average for 2012. Note that the UK radio industry figure is sourced from broadcaster returns made to Ofcom. Population data from US Census Bureau (end of year estimates from mid-year values)

Figure 4.16

Take-up of DAB radio sets among regular radio listeners: 2012 and 2013

Proportion of radio listeners (%)



Source: Ofcom consumer research September 2013, September 2012

Base: All regular radio listeners, 2013: UK=717, FRA=756, GER=775, ITA=741, USA=695, JPN=397, AUS=678, ESP=740, CHN=363, 2012: UK=757, FRA=796, GER=805, ITA=768, USA=749, JPN=384, AUS=700, ESP=763, CHN= 441Q.3a Which of the following devices do you have in your home?

Figure 4.17

Coverage of DAB/ DAB+/ DMB radio: 2012 and 2013



Source: WorldDMB Global Update, Digital radio broadcasting using the DAB family of standards, September 2012; 2013

Note: There are no data for France as digital radio is currently being trialled; the broadcasting authority Conseil Supérieur de l'Audiovisuel has forecasted 60% coverage within seven years.

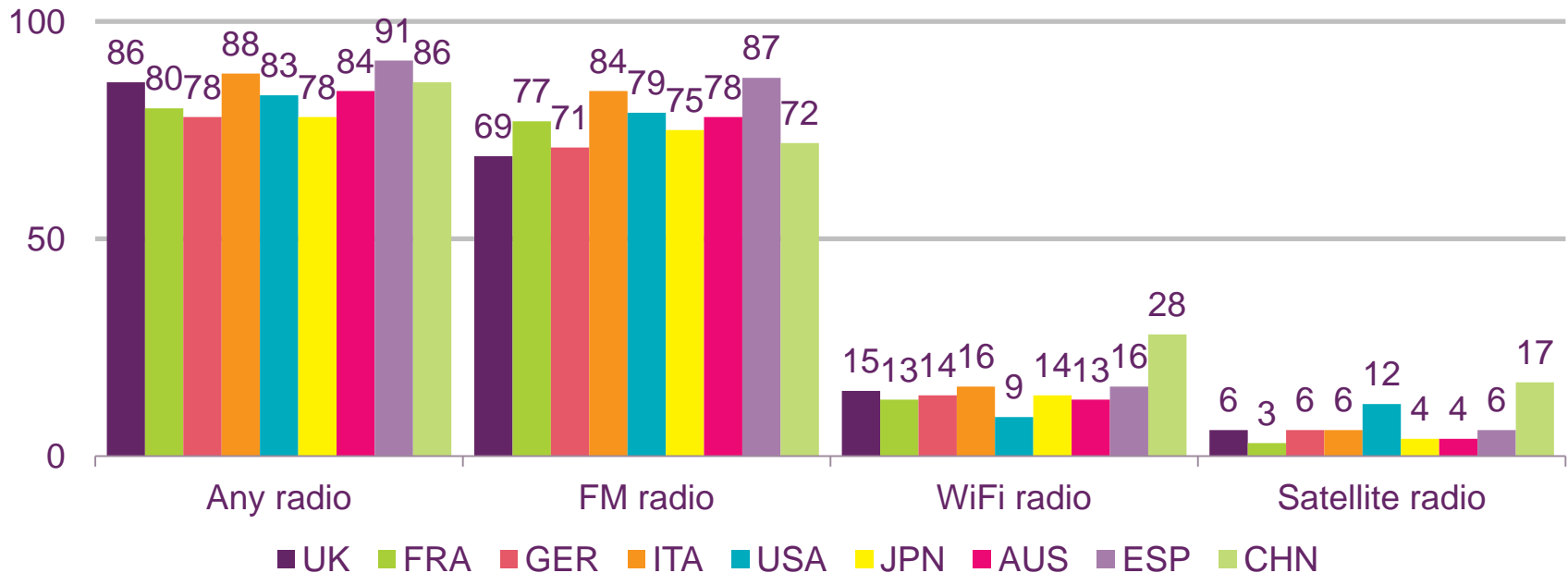
No data for DAB coverage exist for Japan due to digital television and radio services being broadcast over ISBD standards.

In the US satellite radio is the country's main digital radio platform, which has grown to become a major component of US radio revenue since its introduction in the mid-2000s

Figure 4.18

Take-up of any radio set, and FM, WiFi and satellite radio sets, among regular radio listeners

Proportion of radio listeners (%)



Source: Ofcom consumer research September 2013

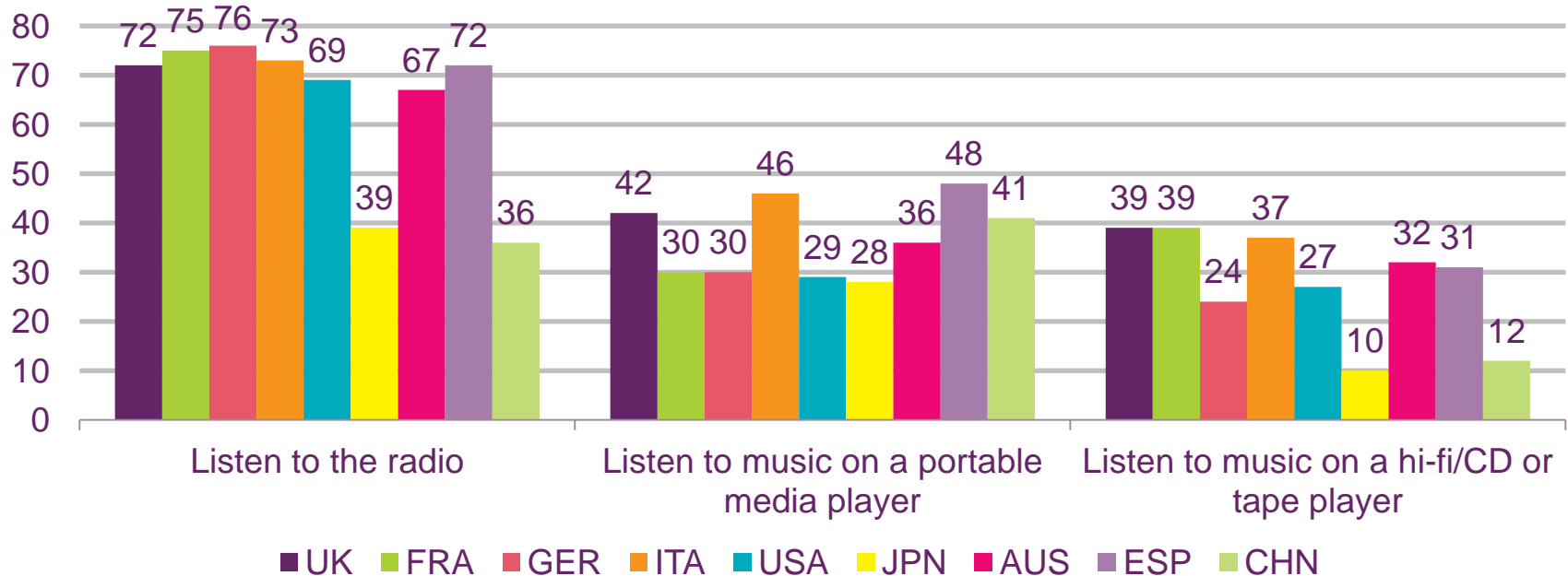
Base: All respondents with a DAB Radio/ Satellite Radio/ WiFi Radio, UK=346, FRA=110, GER=154, ITA=137, USA=160, JPN=69, AUS=155, ESP=130, CHN=191.

Q.15d Which, if any, of the following audio activities do you use each of your devices for?

Figure 4.19

Proportion of adults who claim to regularly consume audio content

All respondents (%)



Source: Ofcom consumer research September 2013

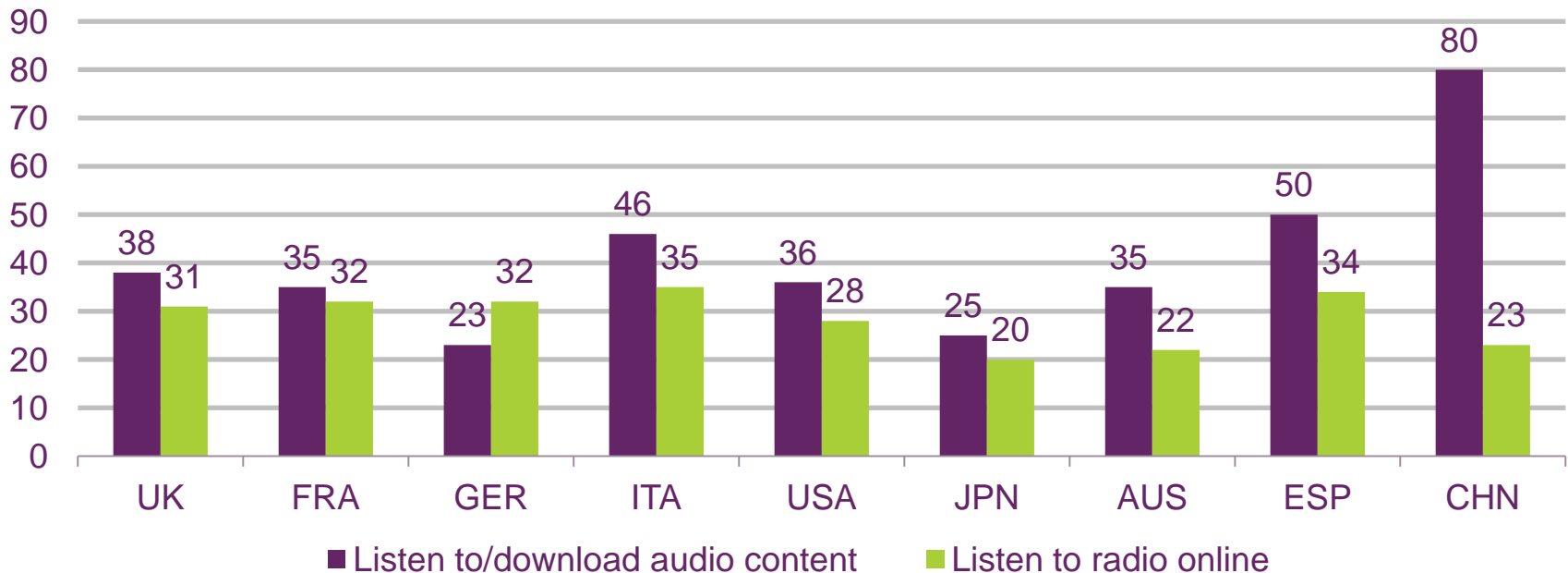
Base: All respondents, UK=1000, FRA=1007, GER=1010, ITA=1010, USA=1004, JPN=1005, AUS=1007, ESP=1020, CHN=1007.

Q.5 Which of the following do you regularly do (at least once a week)?

Figure 4.20

Weekly use of home internet connection to consume audio content

All respondents



Source: Ofcom consumer research September 2013

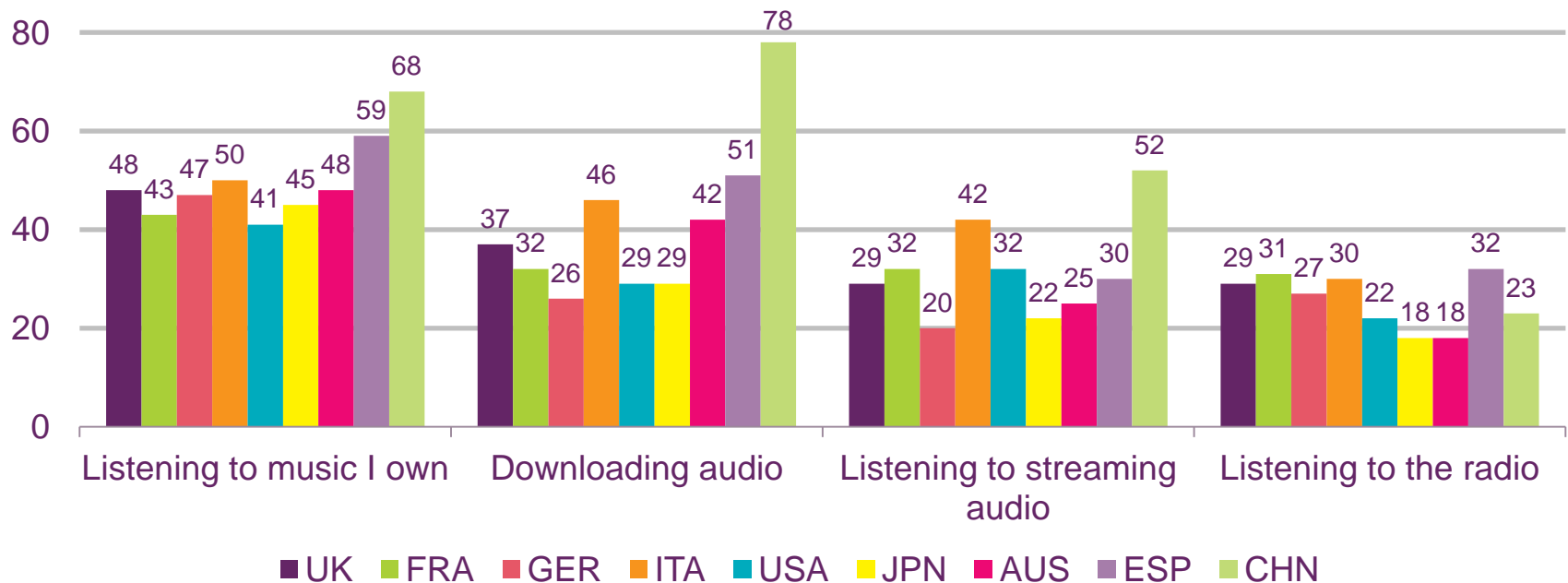
Base: All respondents, UK=1000, FRA=1007, GER=1010, ITA=1010, USA=1004, JPN=1005, AUS=1007, ESP=1020, CHN=1007.

Q.9 Which, if any, of the following activities do you use your internet connection for at least once a week?

Figure 4.21

Audio activities on a laptop/ desktop

All respondents with a laptop/ desktop/ netbook



Source: Ofcom consumer research September 2013

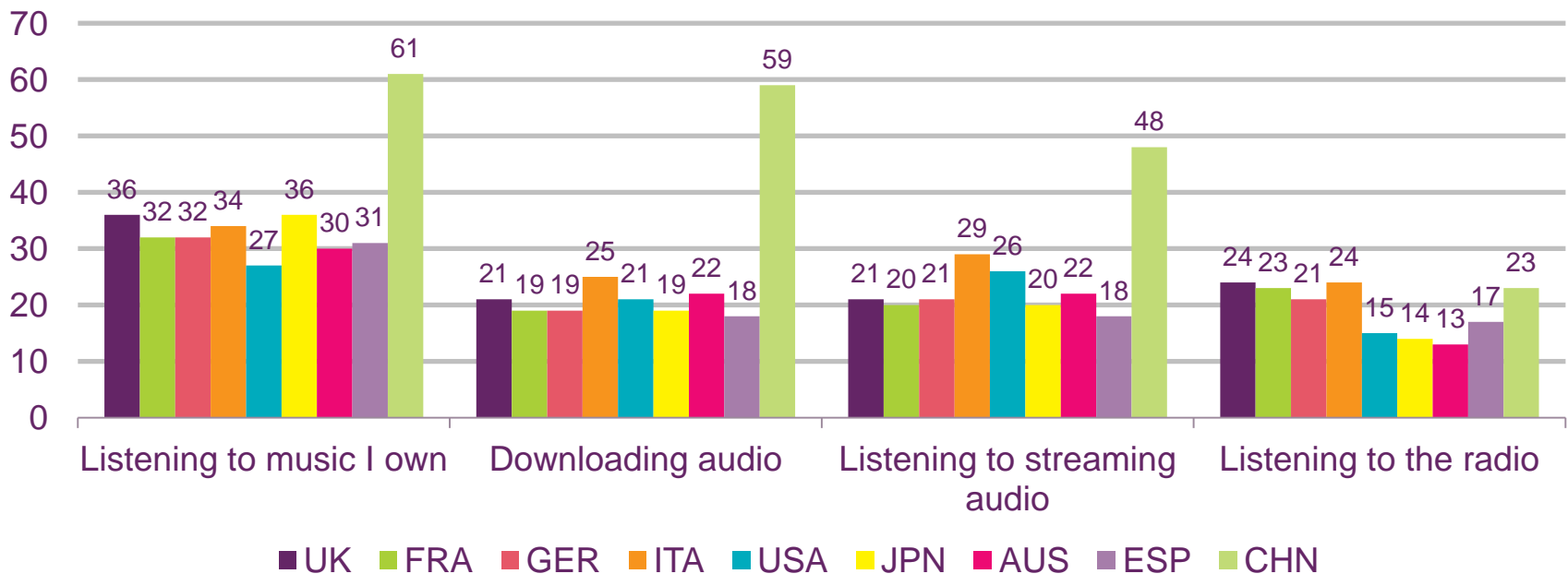
Base: All respondents with a laptop/ desktop/ netbook, UK=952, FRA=941, GER=951, ITA=908, USA=940, JPN=942, AUS=960, ESP=931, CHN=966.

Q.15d Which, if any, of the following audio activities do you use each of your devices for?

Figure 4.22

Audio activities on a tablet computer

All respondents with a tablet



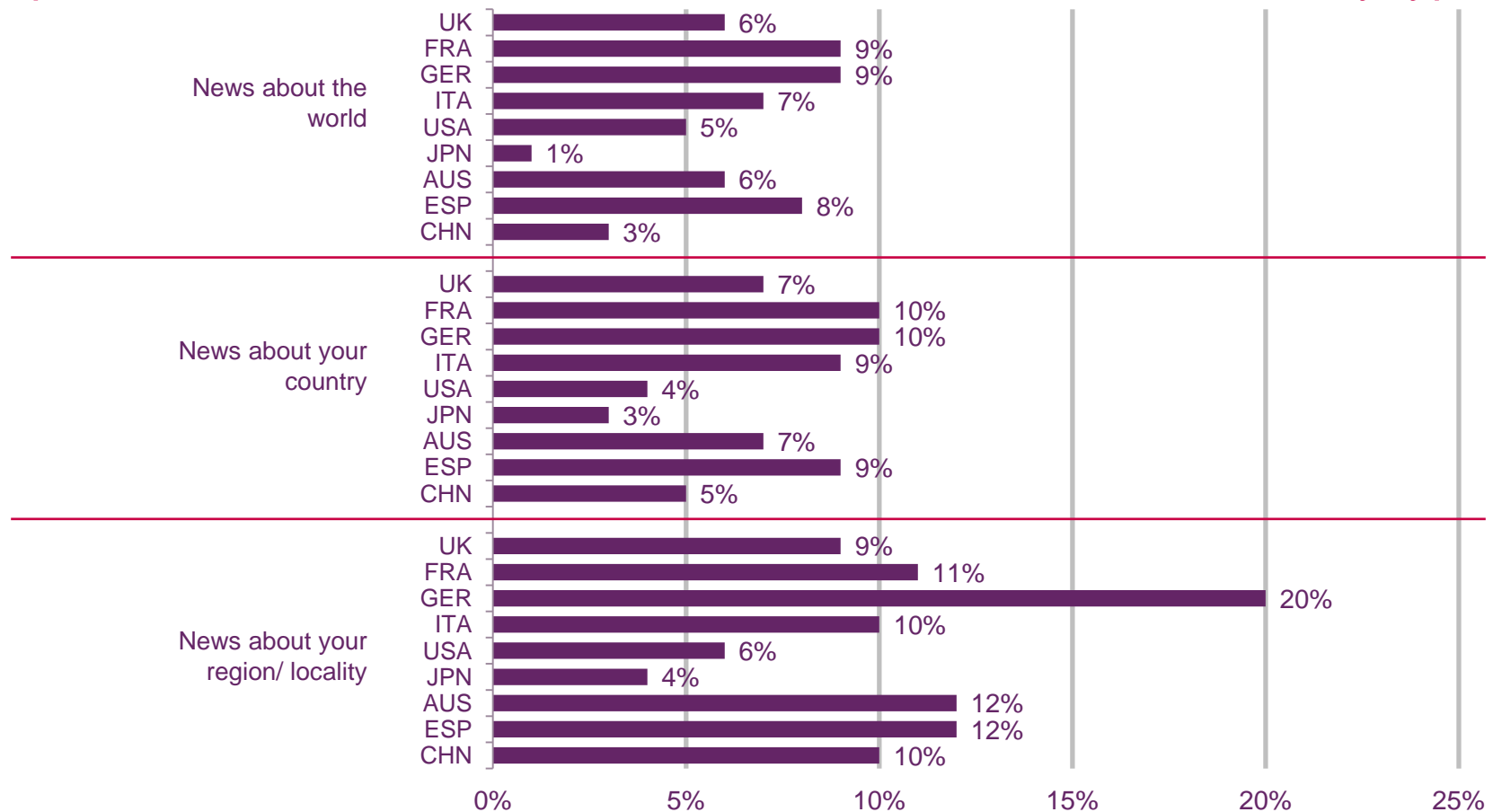
Source: Ofcom consumer research September 2013

Base: All respondents with a tablet, UK=329, FRA=203, GER=180, ITA=286, USA=239, JPN=171, AUS=316, ESP=324, CHN=476.

Q.15d Which, if any, of the following audio activities do you use each of your devices for?

Figure 4.23

Proportion of adults who use radio as their main source of news, by type



Source: Ofcom consumer research September 2013

Base: All respondents, UK=1000, FRA=1007, GER=1010, ITA=1010, USA=1004, JPN=1005, AUS=1007, ESP=1020, CHN=1007.

Q.11 Which, if any, is your main source for the following information?