

3 Radio and audio content

3.1 Recent developments in Northern Ireland

Community radio

Ofcom began a third round of community radio licensing in Northern Ireland in March. There are currently 12 community radio stations operating in Northern Ireland, which are among almost 200 across the UK. (Figure 3.1)

They reflect a diverse mix of cultures and interests. For example, in Northern Ireland listeners can listen to stations which cater for Irish-language interests, with others ranging from student radio to services aimed at religious communities.

They typically cover a small geographical area with a coverage radius of up to 5km, and are run on a not-for-profit basis.

Figure 3.1 Number of community radio stations on air: 2006-2012



Source: Ofcom, April 2012

Commercial radio

Northern Media Group (NMG), which owned the three Q Network commercial stations and their three sister stations: Five, Six, and Seven FM, consolidated the stations under the Q Network brand following a restructuring of the business.

These six stations broadcast at a sub-regional level – Londonderry, Coleraine, Omagh / Enniskillen, Ballymena, Cookstown, and Newry. They transmit mainly networked output with some localised programming, as well as local news, sport and travel.

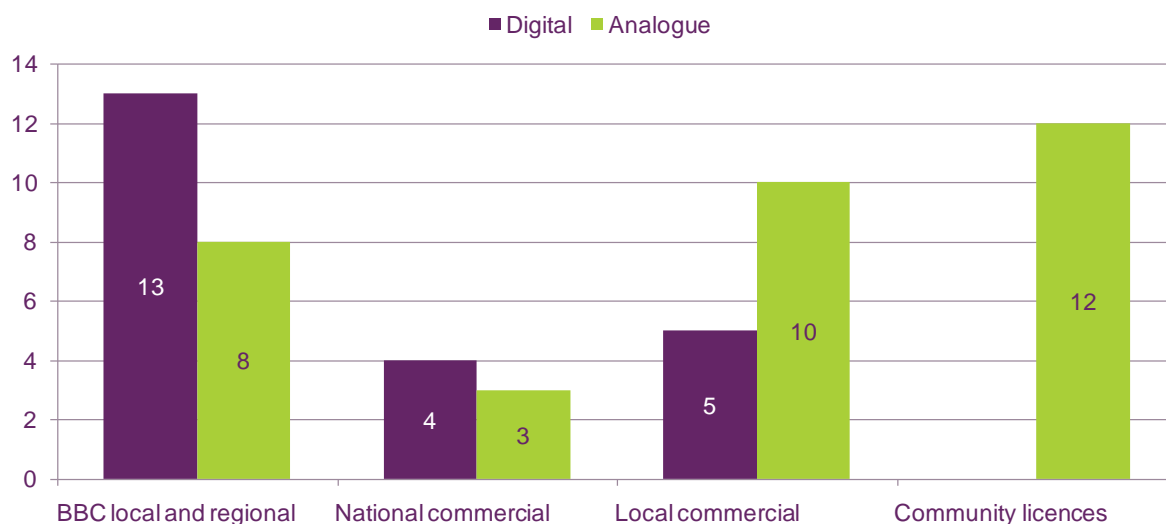
3.2 Radio service availability

Digital radio listeners in Northern Ireland can access up to 22 DAB stations. These include the networked and regional BBC services, Classic FM, talkSPORT, UCB UK, and simulcasts

of four local commercial stations (Downtown Radio, Cool FM, Q102.9FM and City Beat) (Figure 3.2).

There are also ten local commercial stations and 12 community radio stations currently broadcasting in Northern Ireland.

Figure 3.2 Availability of radio stations in Northern Ireland



Source: Ofcom, April 2012

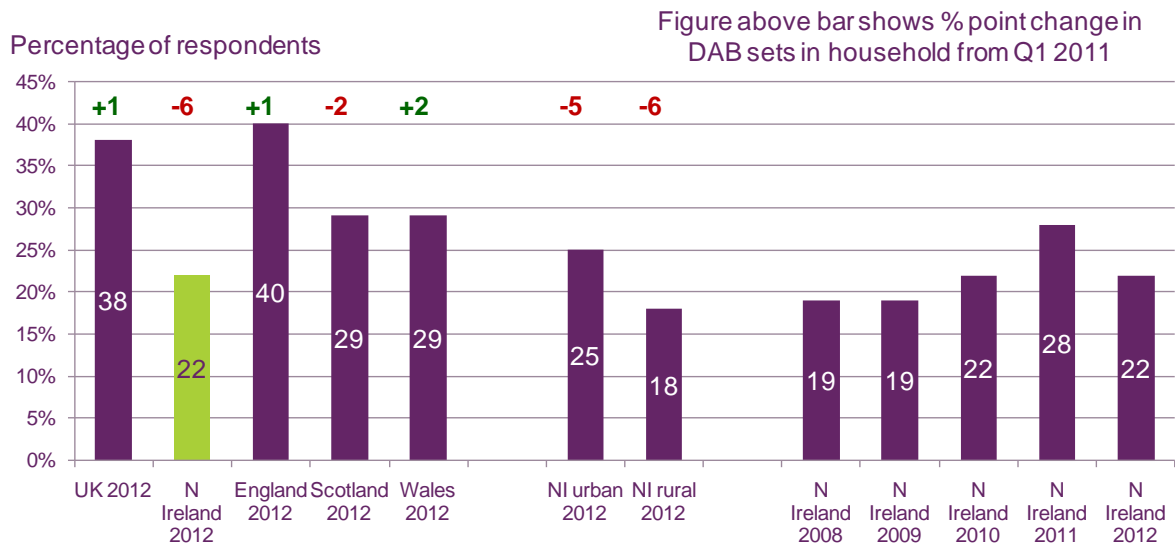
Note: This chart shows the maximum number of stations available; local variations and reception issues mean that listeners may not be able to access all of these

3.3 Digital radio set ownership

According to Ofcom research, nearly four in ten UK households claimed to have access to a DAB radio set in the home in Q1 2012; a similar level to the previous year. However, take-up varies significantly across the UK, being significantly higher in England (at 38%) than the other UK nations. Figure 3.3 shows that take-up is lowest in Northern Ireland (22%), especially in rural areas (18%), where there is a more limited choice of stations. The lower take-up is reflected in the share of listening hours through digital and analogue platforms. Listening on digital platforms in Northern Ireland accounted for 17% of radio listening hours in 2011, significantly lower than the UK average. (Figure 3.4)

The apparent fall of six percentage points in DAB take-up (from 28% in 2011 to 22% in 2012) is within the error margins of the survey and should not therefore be considered significant.

Figure 3.3 Ownership of DAB digital radios



Source: Ofcom research, Quarter 1 2012

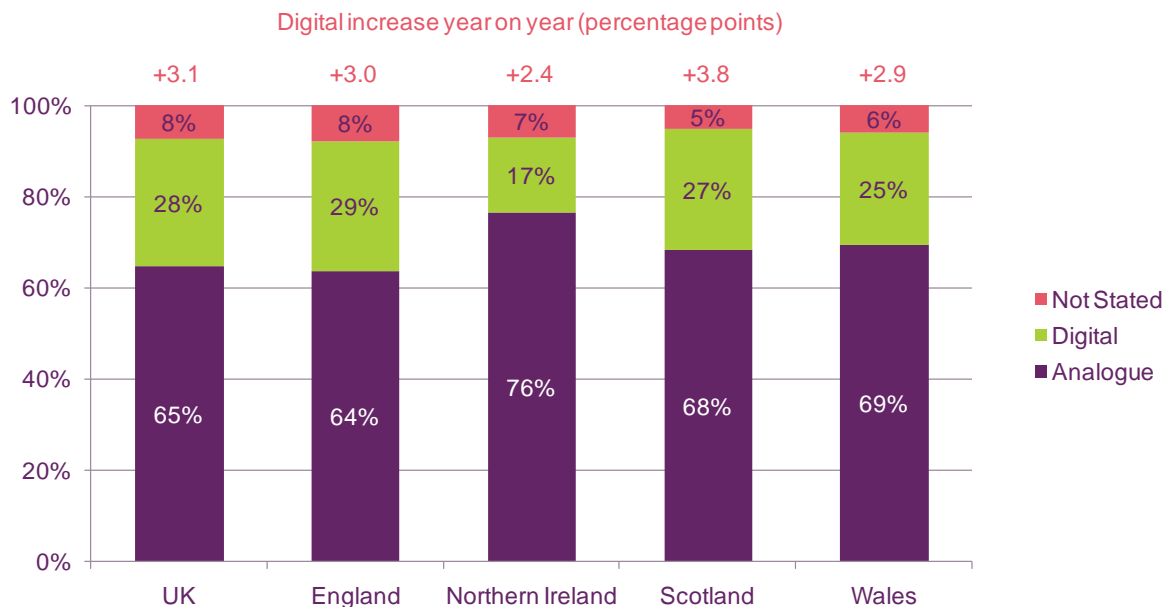
Q4. You said earlier that you have (NUMBER) radio sets in your home that someone in the household listens to in most weeks. How many of these radio sets are digital radios?

Base: Adults aged 16+ who listen to radio (n = 2963 UK, 404 Northern Ireland, 1790 England, 364 Scotland, 405 Wales, 212 Northern Ireland urban, 192 Northern Ireland rural, 539 Northern Ireland 2008, 569 Northern Ireland 2009, 653 Northern Ireland 2010, 428 Northern Ireland 2011, 404 Northern Ireland 2012)

Note: Remaining percentages are Don't know responses.

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.

Figure 3.4 Share of radio listening hours via digital and analogue platforms: 2011



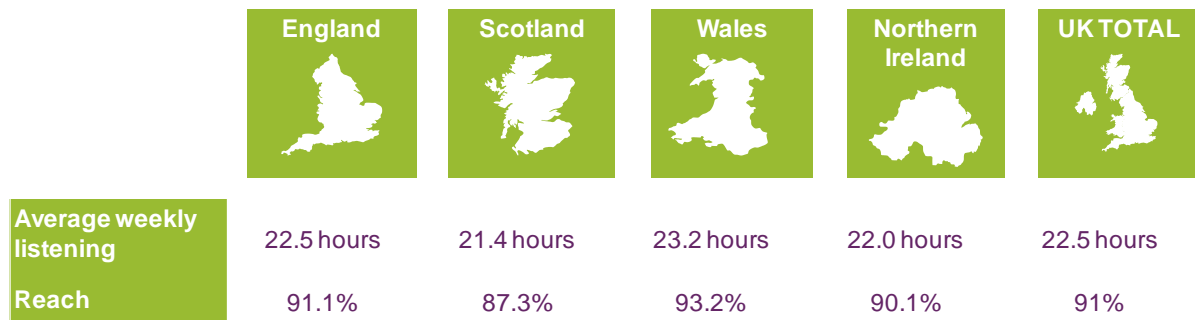
Source: RAJAR, All adults (15+), year ended Q4 2011

3.4 Patterns of listening to audio content

Radio reach in Northern Ireland is close to the UK average

Among adults in Northern Ireland, average weekly radio listening in 2011 stood at 22 hours, slightly lower than the UK average of 22.5 hours. Radio services reached 90.1% of the adult population, 1 percentage point lower than the UK average of 91.1%. (Figure 3.5)

Figure 3.5 Average weekly reach and listening hours: year to Q4 2011

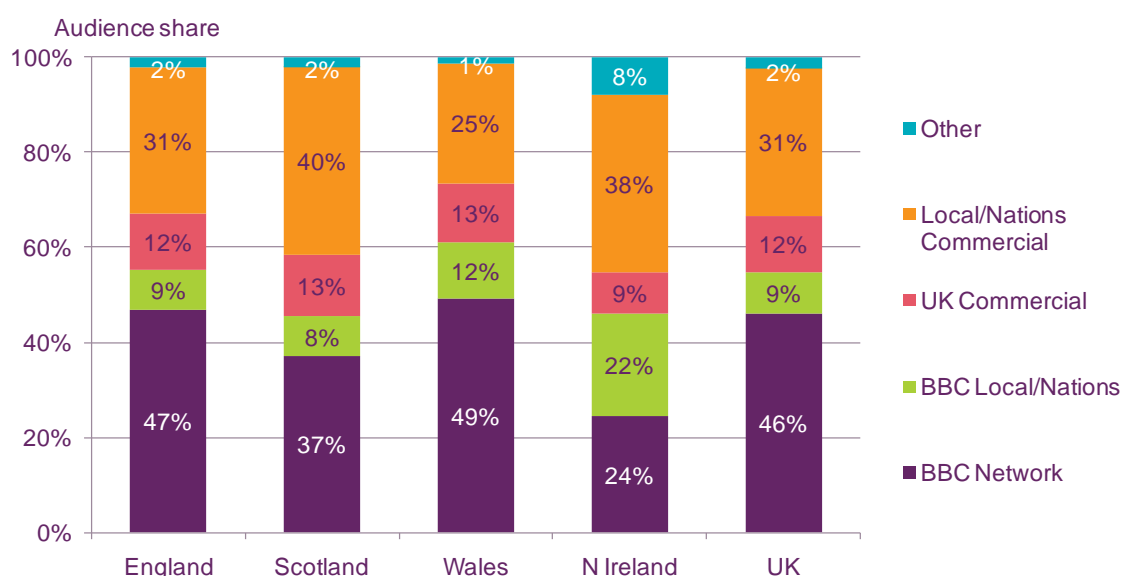


Source: RAJAR, All adults (15+), year ended Q4 2011. Reach is defined as a percentage of the respective adult population who listen to a station for at least five consecutive minutes in the course of an average week

BBC local stations are more popular in Northern Ireland than in other nations

In 2011, BBC local stations accounted for 22% of total radio listening hours in Northern Ireland, significantly higher than across any other UK nation and higher than the UK average of 9%. This is consistent with findings in previous years and is explained by the relatively high share of Radio Ulster/Foyle. The BBC networked stations accounted for a share of listening of 24%, much lower than any of the other nations and significantly lower than the UK average of 46%. The share of other stations, which includes small community and commercial stations and is likely to include cross-border listening to the Republic of Ireland's national broadcaster RTÉ, was 8%. This is higher than the rest of the UK where the average share of other stations was 2%. (Figure 3.6)

Figure 3.6 Share of listening hours, by nation: year to Q4 2011

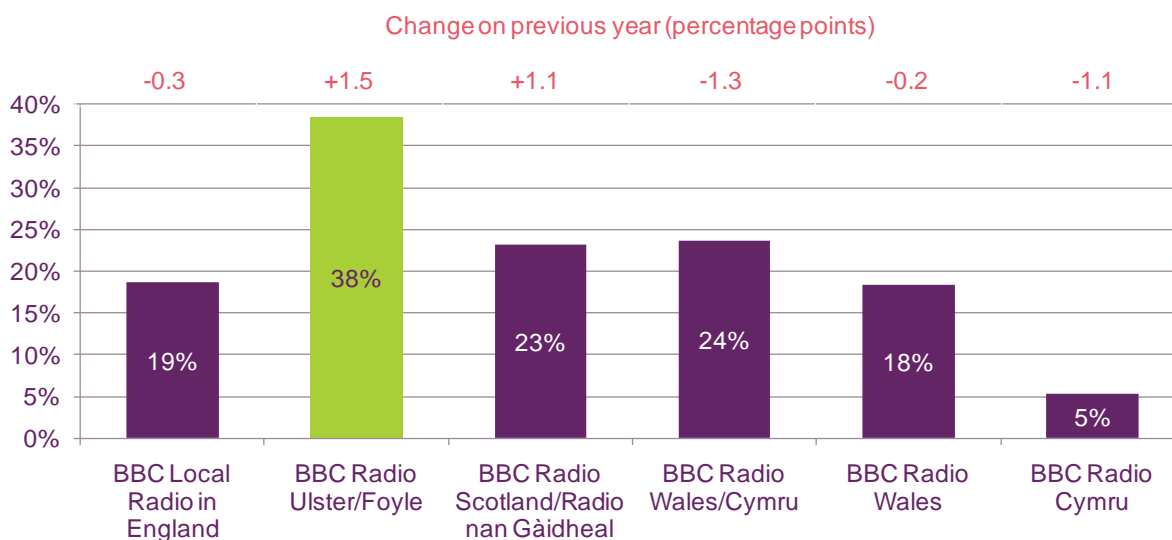


Source: RAJAR, All adults (15+), year ended Q4 2011

Note: BBC Local/Nations includes both BBC Scotland and Radio Nan Gàidheal; BBC Radio Wales and Radio Cymru, and BBC Ulster and Radio Foyle

Over one-third (38%) of adults listened to BBC Ulster/Foyle in an average week in 2011. The figure rose by 1.5 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 3.7)

Figure 3.7 Weekly reach for national/local BBC services



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

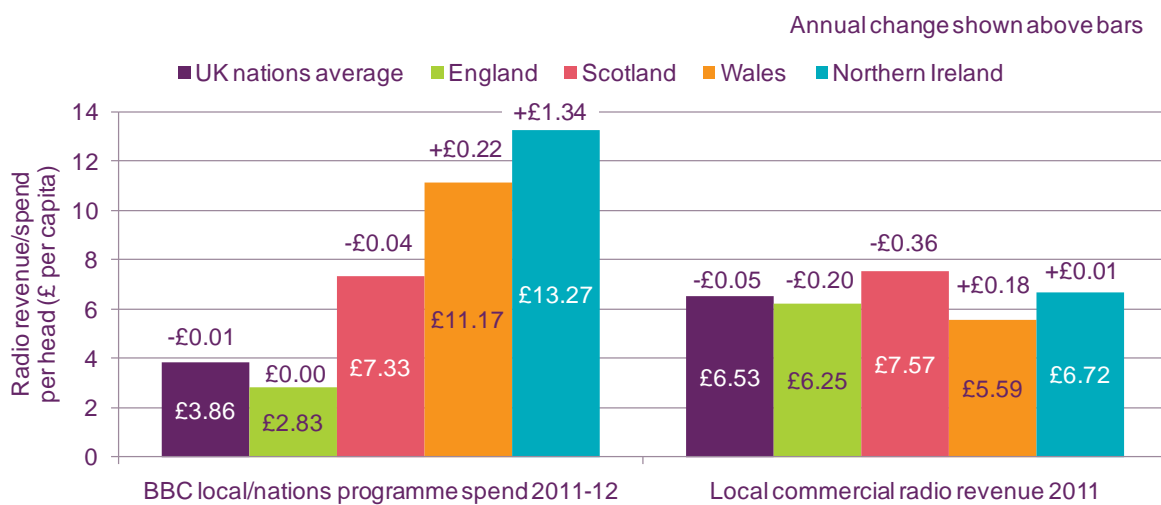
3.5 The radio industry

Commercial radio revenue and BBC Radio funding in Northern Ireland

The commercial revenues generated by local radio stations in Northern Ireland reached £12.1m in 2011. By adjusting for population size, we can see that Northern Ireland has higher revenue per head of population than the UK average at £6.72, a £0.01 increase on 2010. (Figure 3.8)

BBC Radio spend on BBC Radio Ulster and BBC Radio Foyle totalled £23.8m in 2011/12. Expenditure per head in Northern Ireland is the highest among the UK nations, and increased by 10% on the previous year to reach £13.27. This is due to the smaller population in Northern Ireland and the added expenditure of running two services.

Figure 3.8 Local/nations' radio spend and revenue per head of population: 2011/12



Source: Broadcasters

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.