

## 3 Radio and audio content

### 3.1 Recent developments in Wales

#### Radio Ceredigion

In May 2012, Ofcom awarded the re-advertised local commercial radio licence for Ceredigion to the incumbent licensee, Radio Ceredigion Ltd. The licence for Ceredigion was re-advertised in October 2011, attracting two applicants. The successful applicant, Radio Ceredigion Ltd., proposes to provide a local news, music and information service which includes regular and identifiable Welsh language programming.

#### MuxCo announces plans for a new DAB digital radio multiplex

MuxCo has announced launch plans for a new digital radio multiplex serving Liverpool, Cheshire and North Wales from November 2012. Using transmitters at Moel-y-Parc, Wrexham Rhos and St John's Beacon, the multiplex will serve around 1.8 million adults, enabling a range of existing and new services to broadcast on DAB digital radio.

### 3.2 Community radio broadcasting

#### Community radio

In April 2012, Ofcom announced the award of four new community radio licences in Wales.

- Glan Clwyd AM, Bodelwyddan, Denbighshire
- Môn FM, Isle of Anglesey
- Harlech FM, Harlech, Gwynedd
- Radio Beca, Ceredigion, Carmarthenshire & north Pembrokeshire

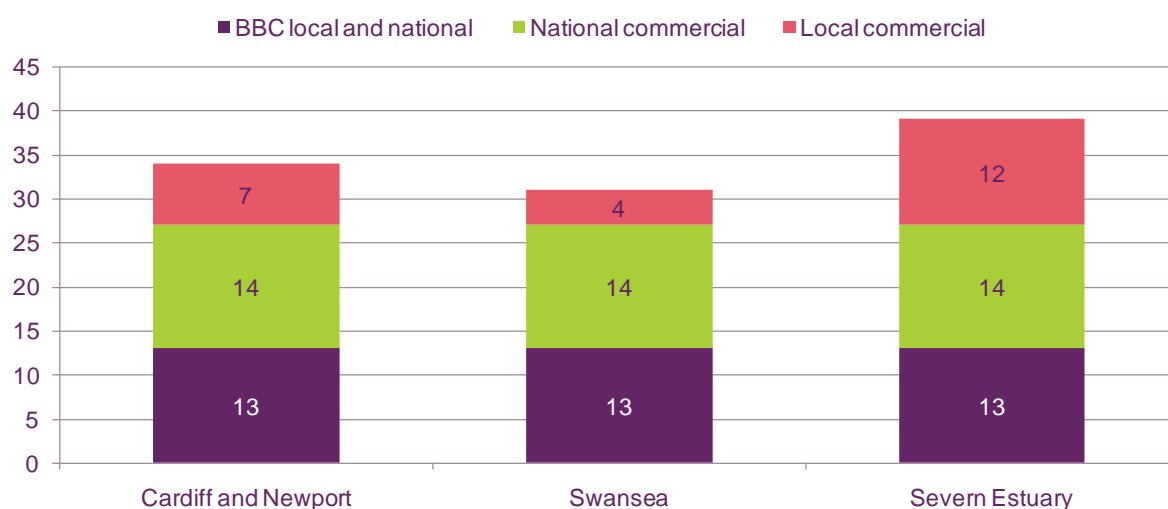
Community radio services are provided on a not-for-profit basis, focusing on the delivery of specific social benefits to a particular geographical community or a community of interest.

Glan Clwyd AM will target its broadcasts at those aged 45+ in Bodelwyddan and surrounding areas; Môn FM will broadcast to communities across Anglesey; Harlech FM will be located at Coleg Harlech, and serve the bilingual community in and around Harlech; and Radio Beca will serve the communities of Carmarthenshire, Ceredigion and north Pembrokeshire, providing most of its content in Welsh.

### 3.3 Radio service availability

Across Wales, digital radio listeners in the Severn Estuary and South Wales area have the greatest DAB choice, with 39 stations. This includes the networked and national BBC services, the 14 services available on the national Digital One multiplex and 12 commercial stations. Station choice is lowest in Swansea, with four local commercial stations available on DAB. (Figure 3.1)

**Figure 3.1 Availability of DAB stations in Wales, by area**



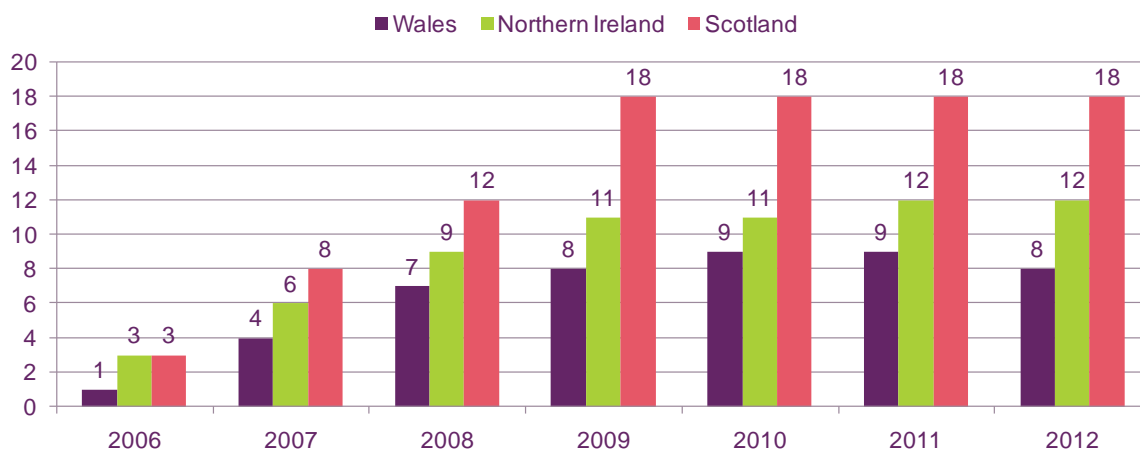
Source: Ofcom, April 2012

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

In addition to the digital services available, there are 18 analogue stations and eight community radio stations currently broadcasting in Wales. (Figure 3.2)

**Figure 3.2 Number of community radio stations on air, 2006- 2012**

	2006	2007	2008	2009	2010	2011	2012
England	29	72	95	126	146	160	159
UK	36	90	123	163	184	199	197



Source: Ofcom, April 2012

### 3.4 Digital radio set ownership

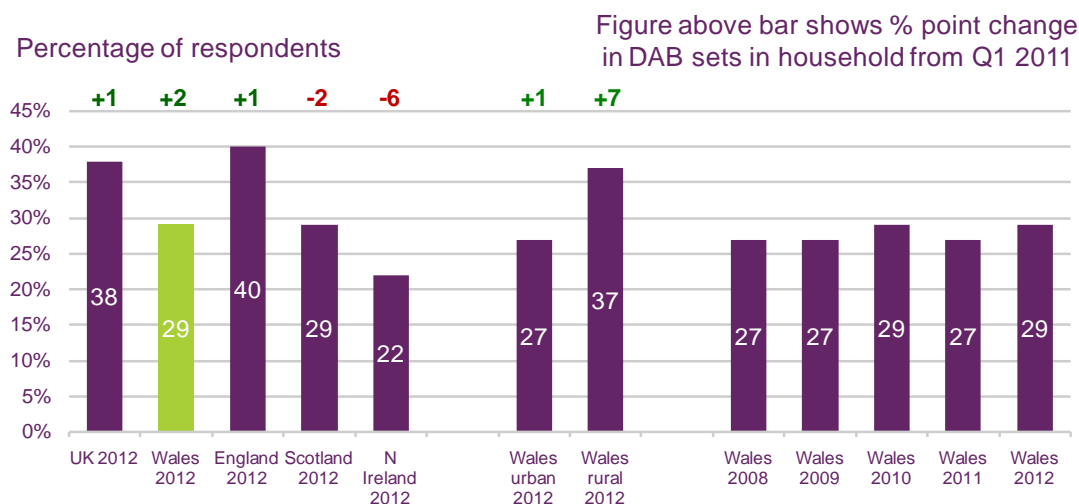
Nearly three in ten (29%) adults in Wales who listen to the radio say that they have at least one DAB radio set at home<sup>11</sup>. The proportion of DAB set owners in Wales remains lower than the UK average, but broadly comparable with Scotland and higher than Northern

<sup>11</sup> Caution should be applied to these data since some respondents in our survey may have confused the description of a DAB radio set with an analogue set that has a digital display.

Ireland. Take-up in Wales may be limited by the reduced availability of DAB in Wales compared with the rest of the UK.

Among radio listeners in Wales who do not have a DAB radio set, around one in ten (9%) say they are either 'certain' or 'very likely' to purchase a DAB set in the next year.

**Figure 3.3 Ownership of DAB digital radios**



Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ who listen to radio (n = 2963 UK, 405 Wales, 1790 England, 364 Scotland, 404 Northern Ireland, 191 Wales urban, 214 Wales rural, 638 Wales 2008, 848 Wales 2009, 854 Wales 2010, 397 Wales 2011, 405 Wales 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.

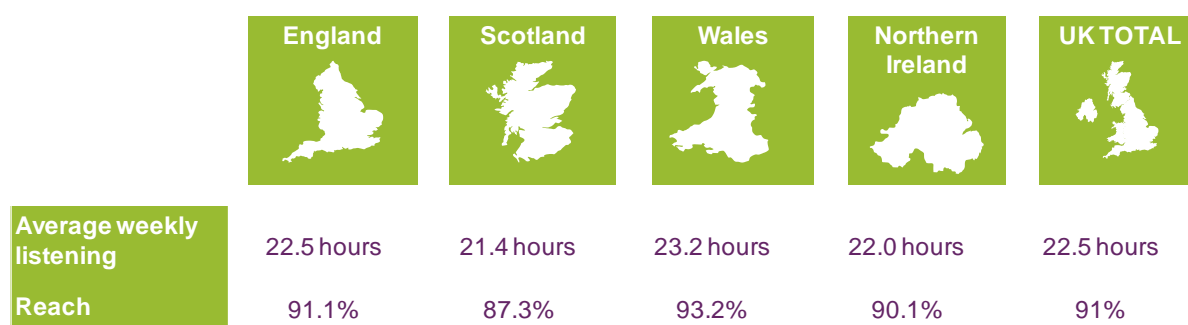
Q4. You said earlier that you have (NUMBER) radio sets in your home that someone in the household listens to in most weeks. How many of these radio sets are digital radios?

### 3.5 Patterns of listening to audio content

#### Adults in Wales listen to the most radio per week

Among adults in Wales, average weekly radio listening in 2011 stood at 23.2 hours, the highest across all of the UK nations. Radio services reached 93.2% of the adult population, again the highest of all of the UK nations and 2.1 percentage points higher than the UK average of 91.1%. (Figure 3.4)

**Figure 3.4 Average weekly reach and listening hours: year to Q4 2011**

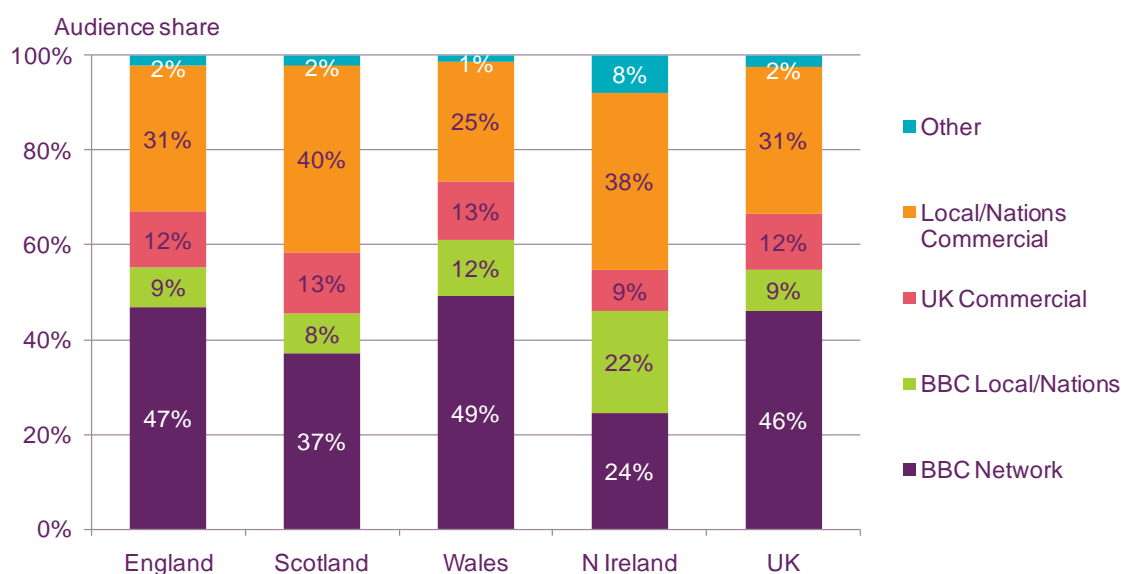


Source: RAJAR, All adults (15+), year ended Q4 2011. Reach is defined as a percentage of the respective adult population who listen to a station for at least five consecutive minutes in the course of an average week

### BBC radio stations are more popular in Wales than in other nations

In 2011, BBC stations accounted for 61% of total radio listening hours in Wales, a higher share for this sector than in any other UK nation (the UK average was 55%). National commercial stations attracted a 13% market share, similar to the UK average of 12%. In comparison to the other nations, the market share of local commercial stations is the lowest, at 25%. The UK average is 31%. (Figure 3.5)

**Figure 3.5 Share of listening hours, by nation: year to Q4 2011**

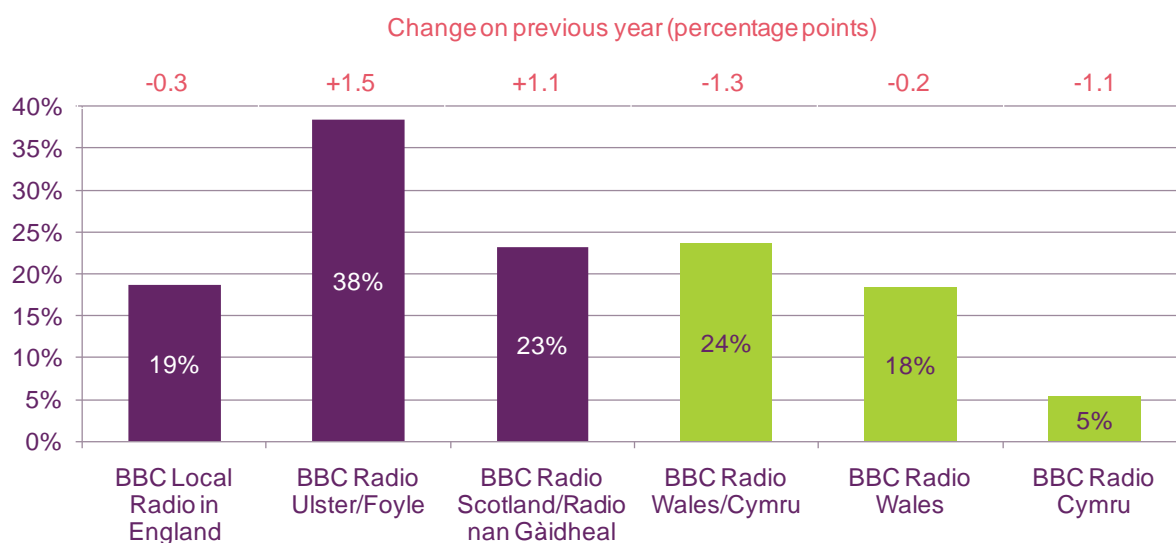


Source: RAJAR, All adults (15+), year ended Q4 2011

Note: BBC Local/Nations includes both BBC Scotland and Radio Nan Gaidheal

Just over one fifth (24%) of adults listened to BBC Radio Wales/Radio Cymru in an average week in 2011, a fall of 1.3 percentage points on the previous year. BBC Radio Cymru reached 5% of adults in an average week, a fall of 1.1 percentage points in comparison to the previous year. Listening to BBC Radio Wales in 2011 was on par with 2010, reaching 18% of adults in an average week. Listening to nations-based services in Wales was slightly higher to that in Scotland, with BBC Radio Scotland reaching 23% of adults per week. (Figure 3.6)

**Figure 3.6 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 listed to at least five consecutive minutes in the average week.

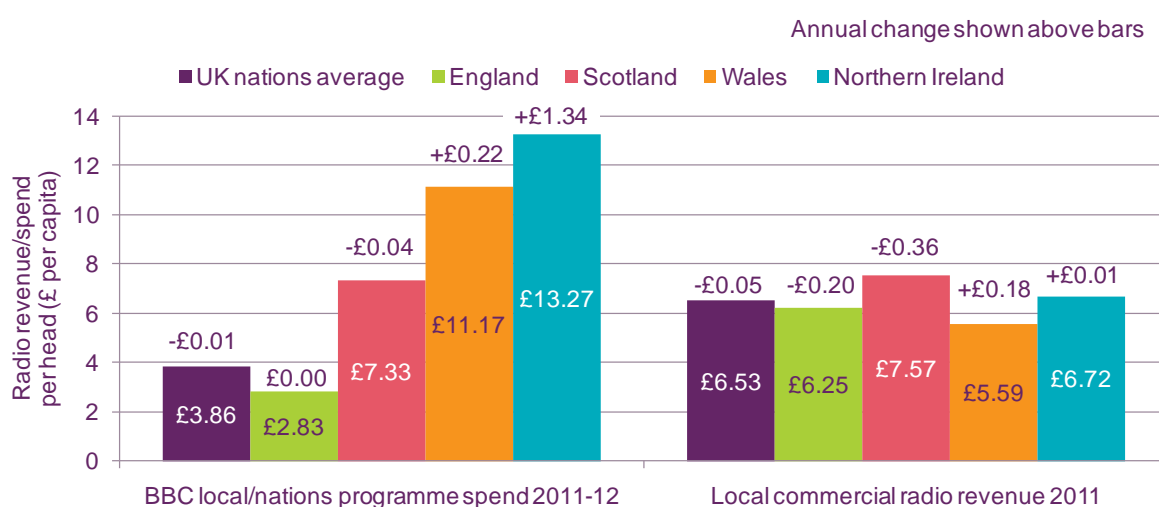
### 3.6 The radio industry

#### Commercial radio revenue and BBC Radio funding in Wales

The commercial revenues generated by local radio stations in Wales reached £16.9m in 2011. Adjusting for population size, Wales has the lowest revenue per head of the UK nations at £5.59, despite a £0.18 (3%) increase on 2010. (Figure 3.7)

BBC radio spend on BBC Wales and BBC Radio Cymru totalled £33.6m in 2011/12. Expenditure per head was the second highest of the UK nations at £11.17, a 2% increase on the previous year. This is due to the smaller population in Wales and the added expenditure of running two services. It compares to the UK average spend per head of £3.86.

**Figure 3.7 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