The Communications Market:

Digital radio report chart pack

July 2010

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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.

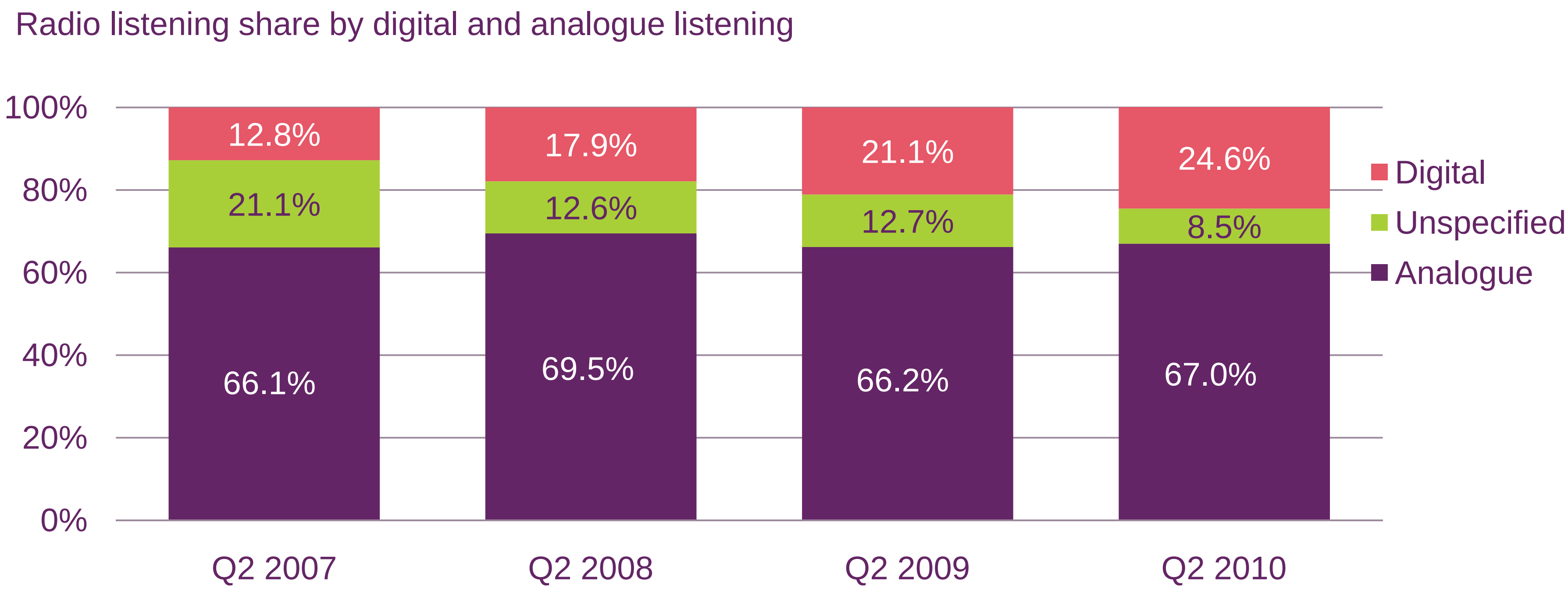
- The plan emphasises that digital radio switchover should only begin when the market is ready for such a process and that it should therefore be predominantly consumer-led. An aspirational target date of 2015 was supported by the report. But it also concluded that a decision on switchover could only 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. Future editions will also report on the coverage project, designed to measure current levels of FM and DAB coverage.

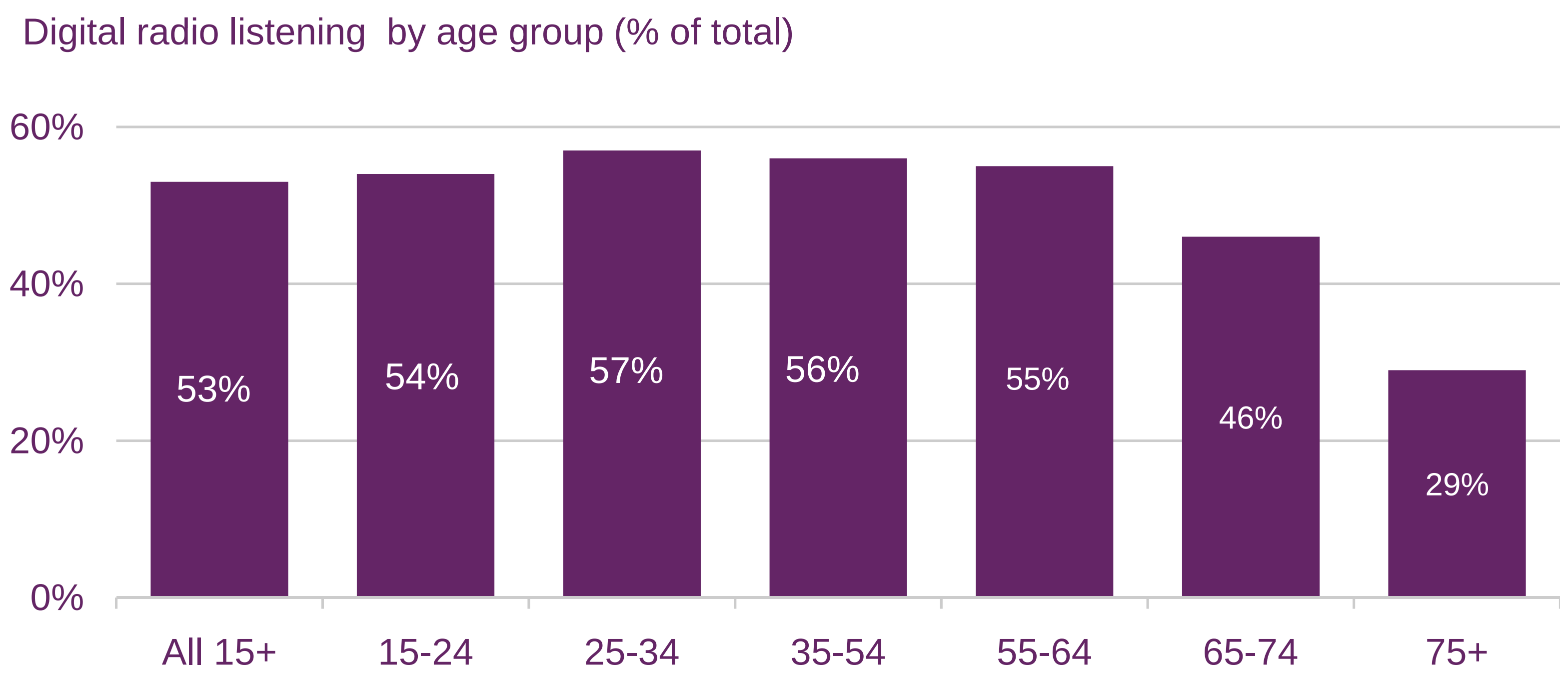
- In this report 'digital radio' is used in its broadest sense to include all platforms and technologies that allow listeners to access digital radio services.

Figure 1 Percentage share of listening hours (digital, analogue, unspecified)



Source: RAJAR Ipsos MORI/ RSMB
Note: New digital radio listening share survey begun in Q2 2007 by RAJAR Ipsos MORI/ RSMB

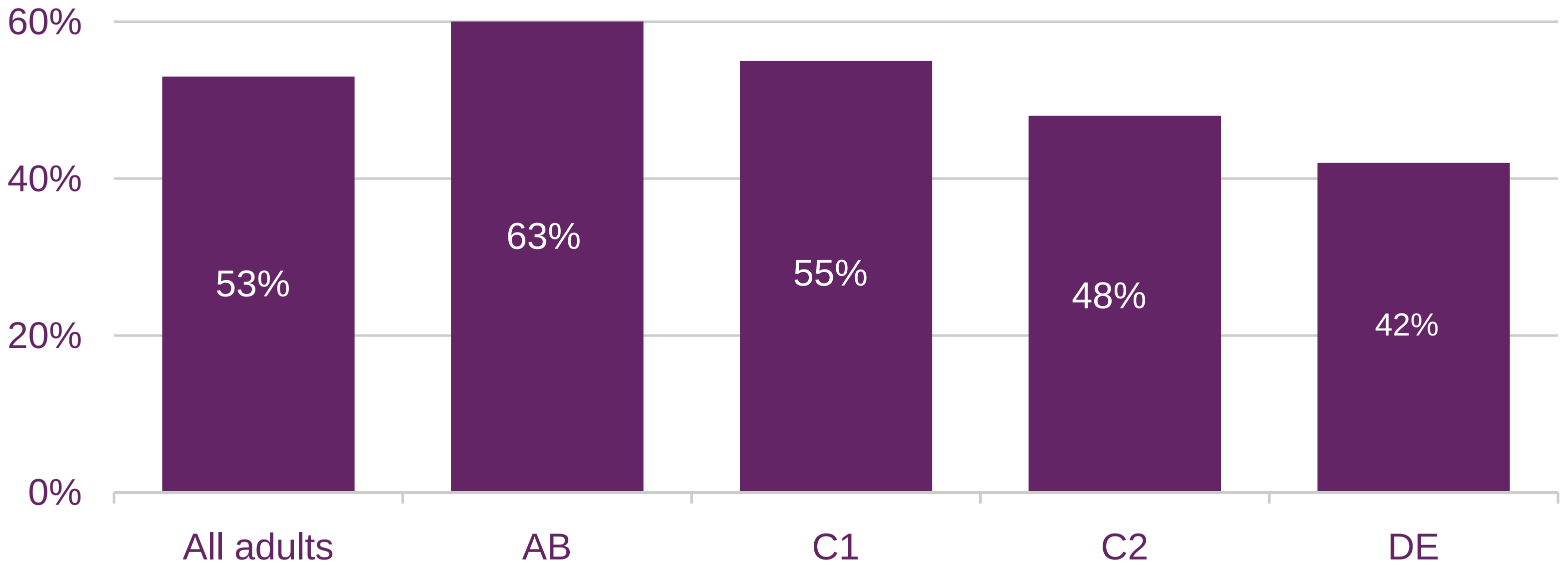
Figure 2: Proportion of people, by age, who have ever listened to radio via a digital platform, Q1 2010



Source: Ofcom research, Q1 2010
Base: All who listen to the radio (n=7017)
Q: Whether ever use digital radio

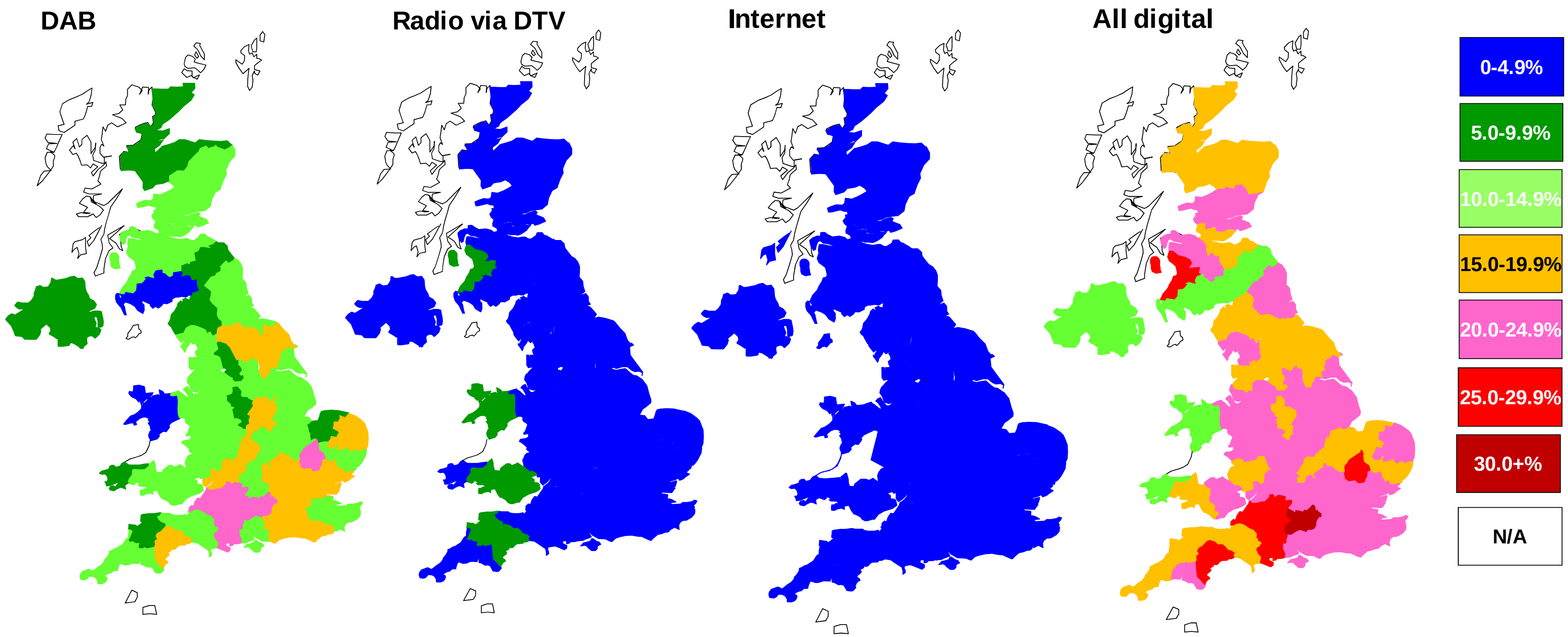
Figure 3: Distribution of listening to digital radio, by socio-economic group – ever used digital radio

Digital radio listening by socio-economic group (% of total)



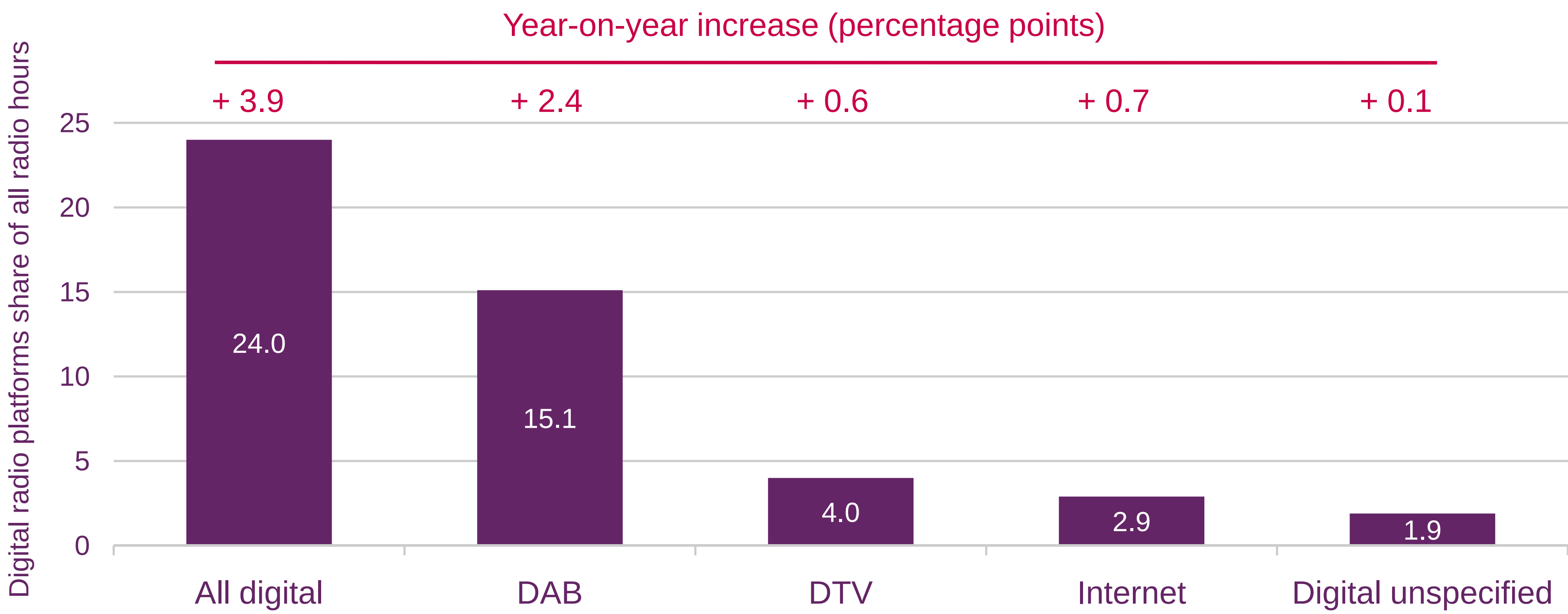
Source: Ofcom research, Q1 2010
Base: All who listen to the radio (n=7017)
Q: Whether ever use digital radio

Figure 4: Share of digital listening, by platform and area



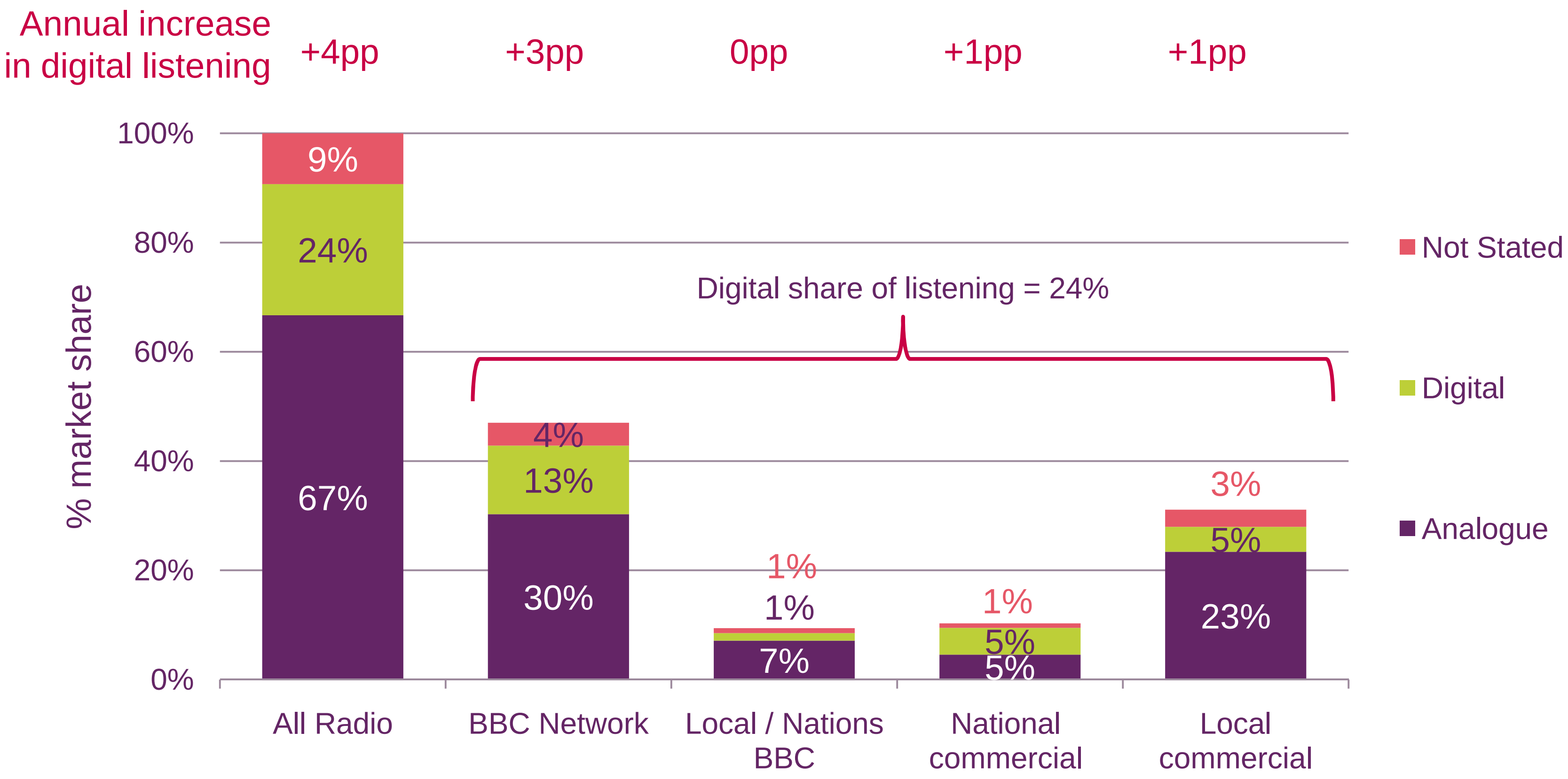
Source: Ofcom / RAJAR / Octagon Q1 2010

Figure 5: Digital radio's share of radio listening, Q1 2010



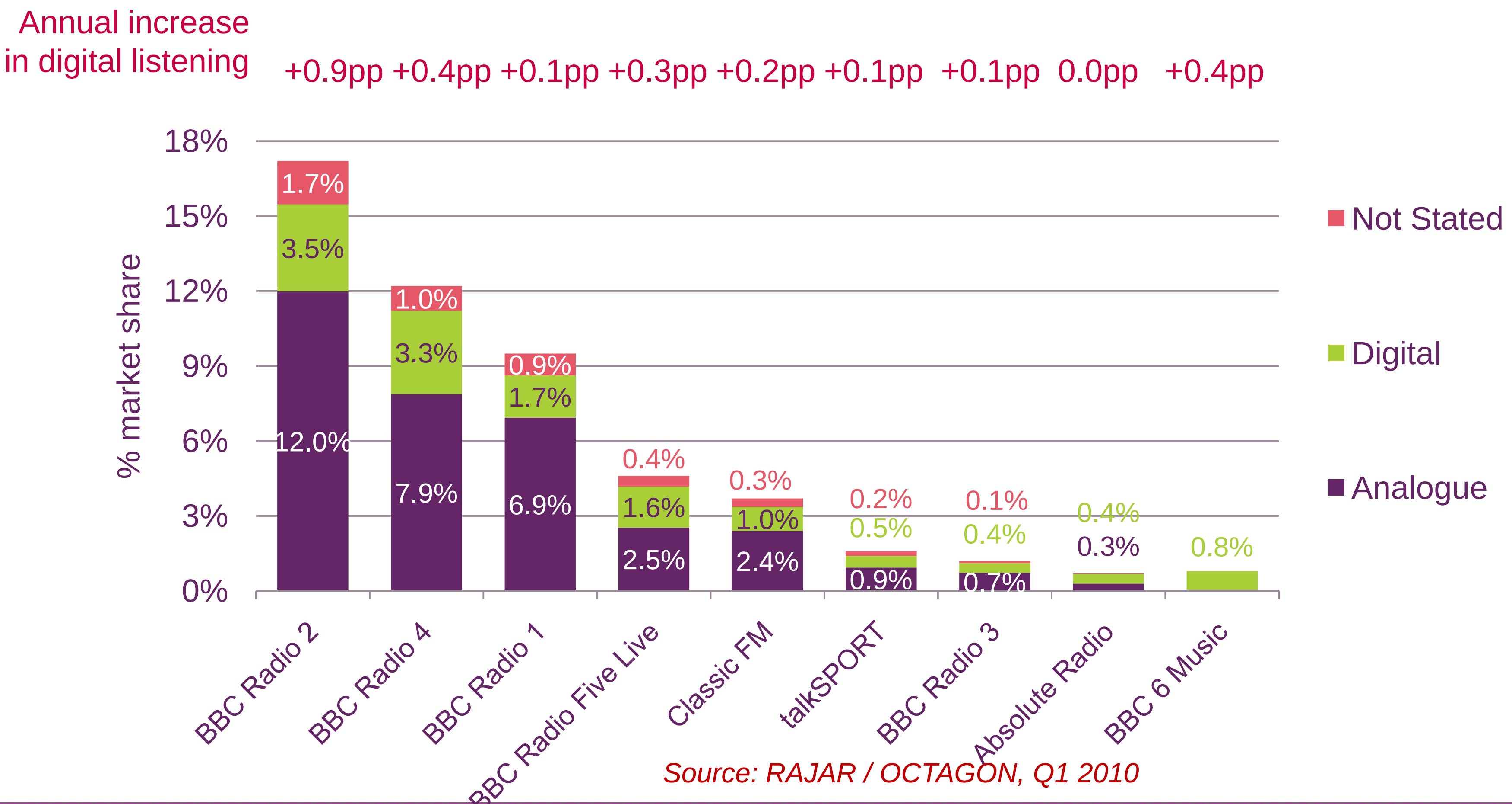
Source: RAJAR (adult listeners 15+), Q1 2010
Note: 'Digital unspecified' relates to listening to digital-only stations where the survey respondent has not specified the listening platform used.

Figure 6: Distribution of listener hours, by service and analogue/digital platforms, Q1 2010



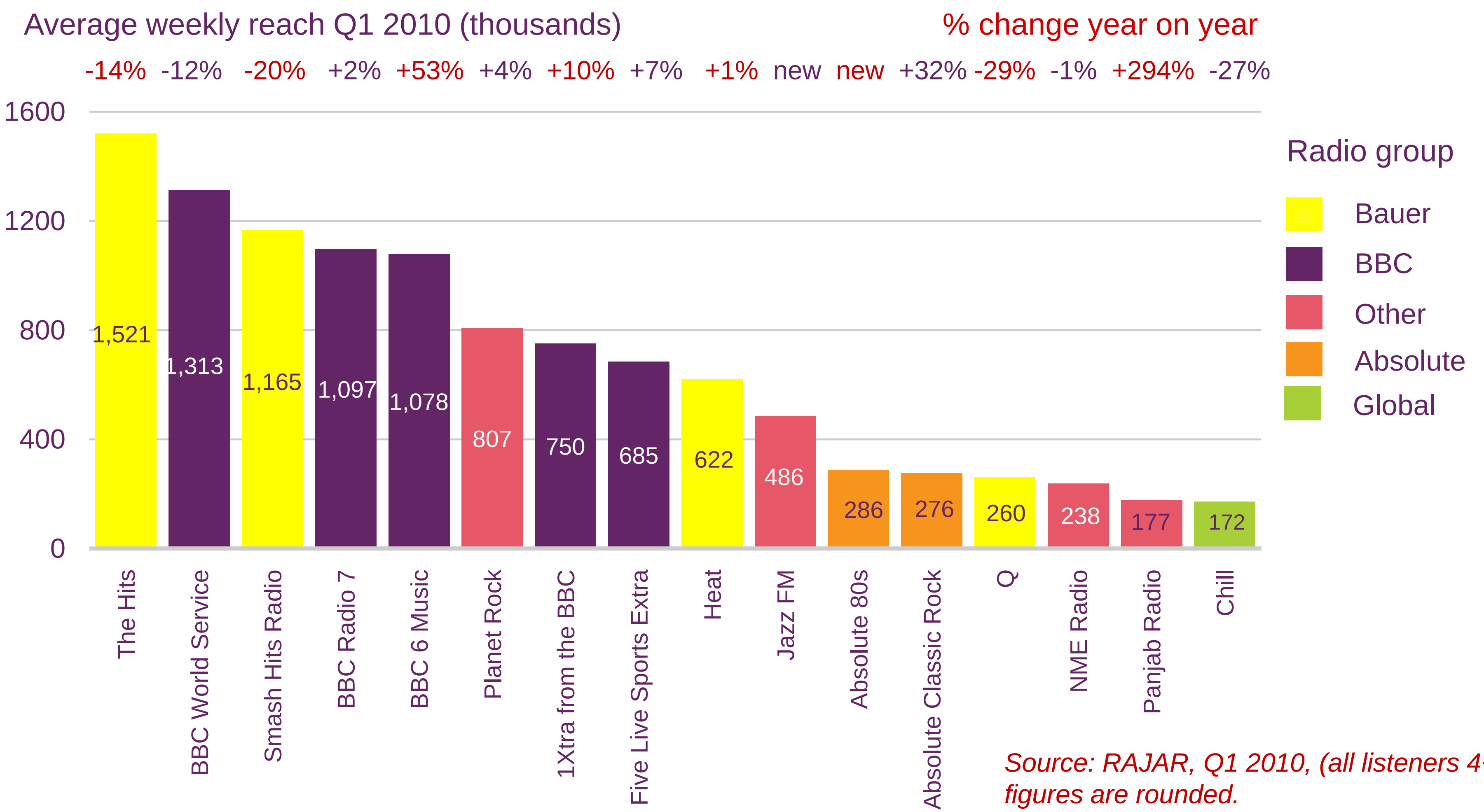
Source: RAJAR / OCTAGON, Q1 2010

Figure 7: Distribution of listener hours, by service, between analogue & digital platforms, Q1 2010



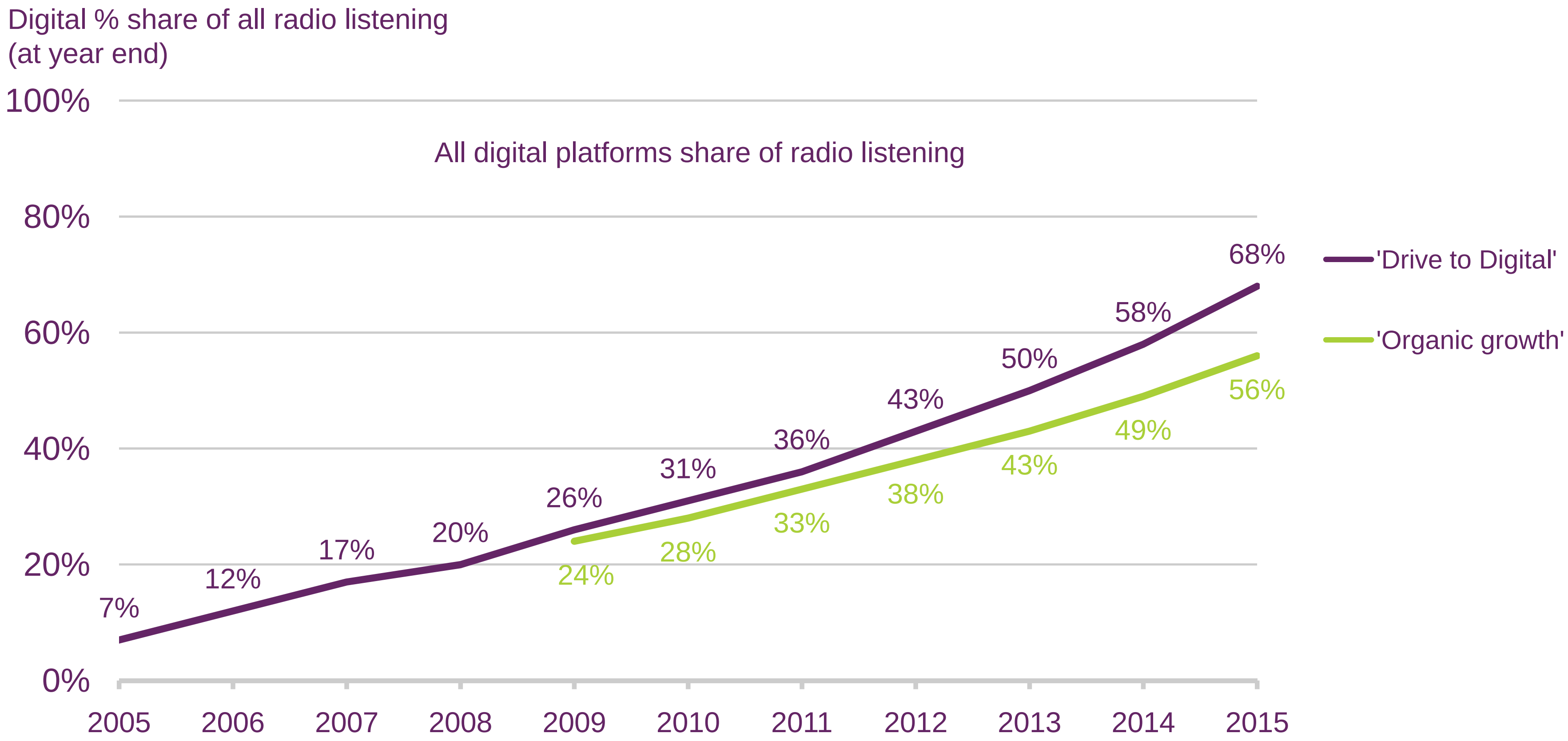
Source: RAJAR / OCTAGON, Q1 2010

Figure 8: Most listened-to digital-only stations, Q1 2010



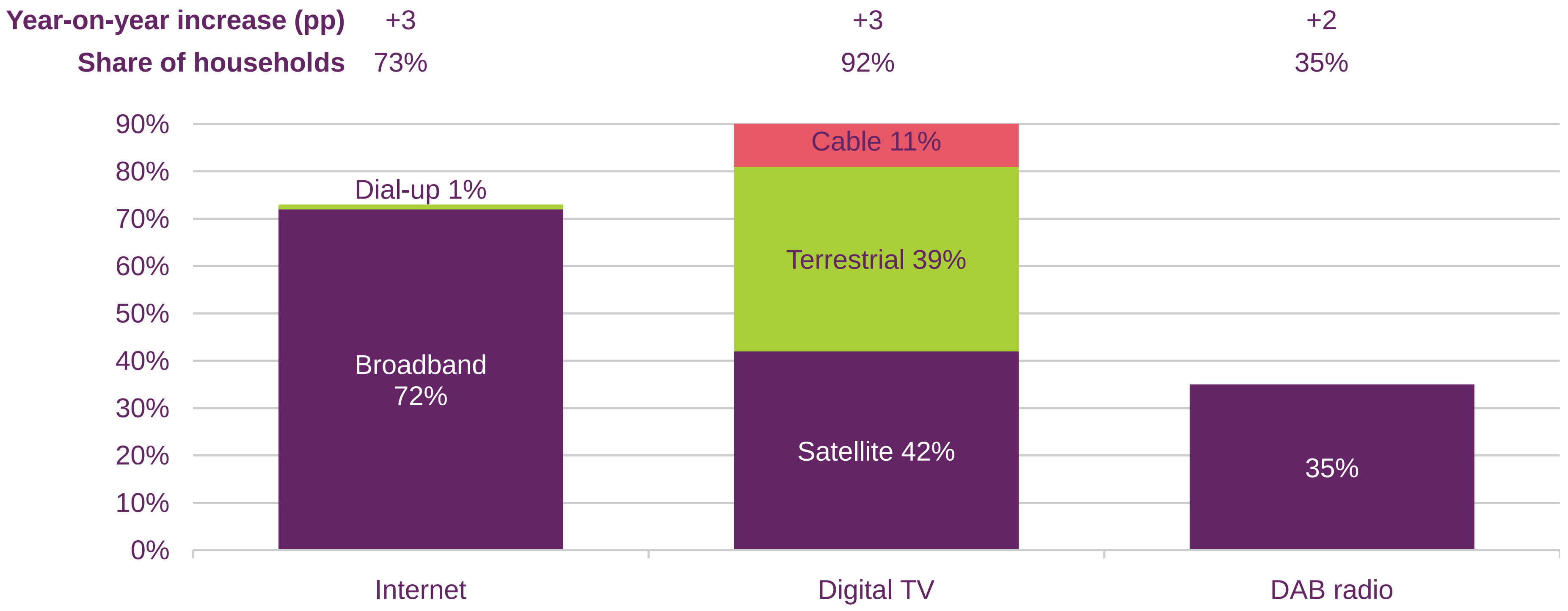
Source: RAJAR, Q1 2010, (all listeners 4+), figures are rounded.

Figure 9: Forecast digital radio listener hours, according to the last government's Digital Britain report



Source: Digital Britain Report, Value Partners Analysis, RAJAR

Figure 10: Take-up of equipment capable of receiving digital radio, 2010



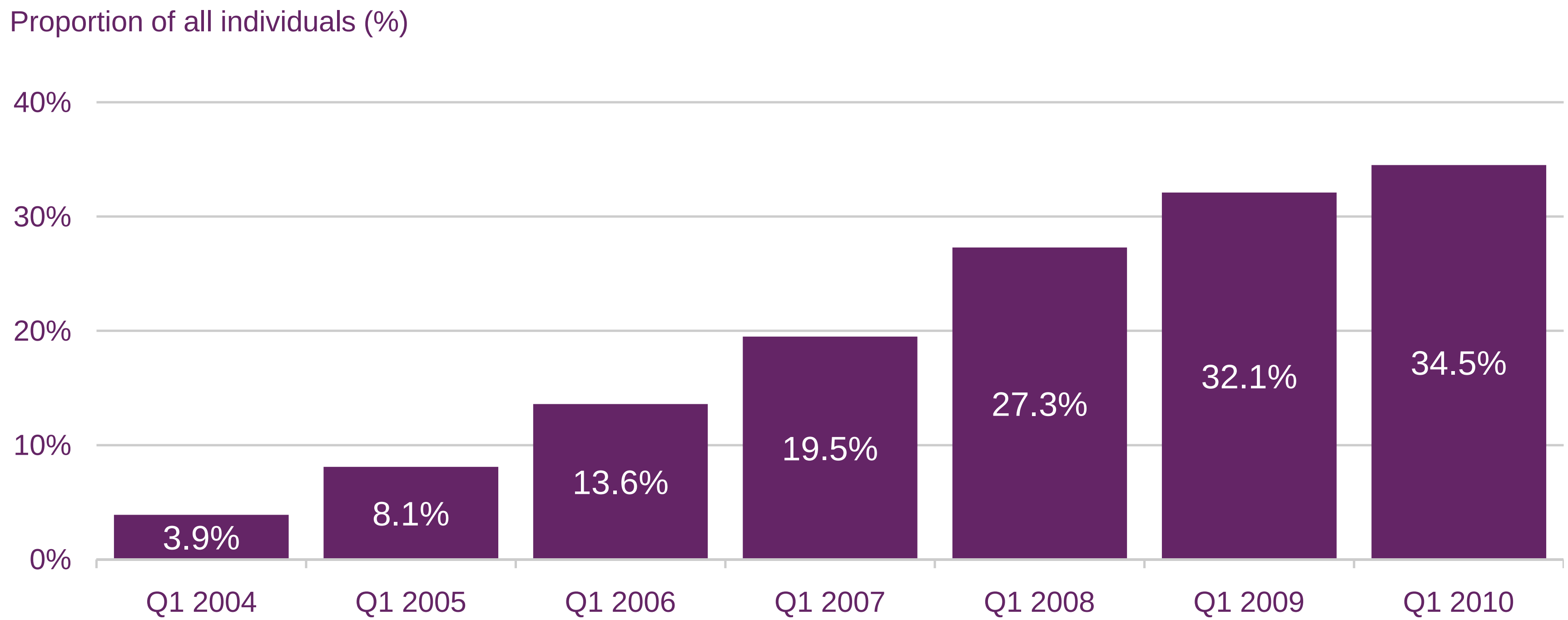
Source: Research from: Ofcom, GfK and RAJAR Q1 2010

Figure 11: The radio set universe, frequency of listening and proportion that are digital

	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]	70m – 80m	73%	14%-16%
Vehicle radios[2]	34m	92%	1%
Total	104 – 114m	83%	10%-11%

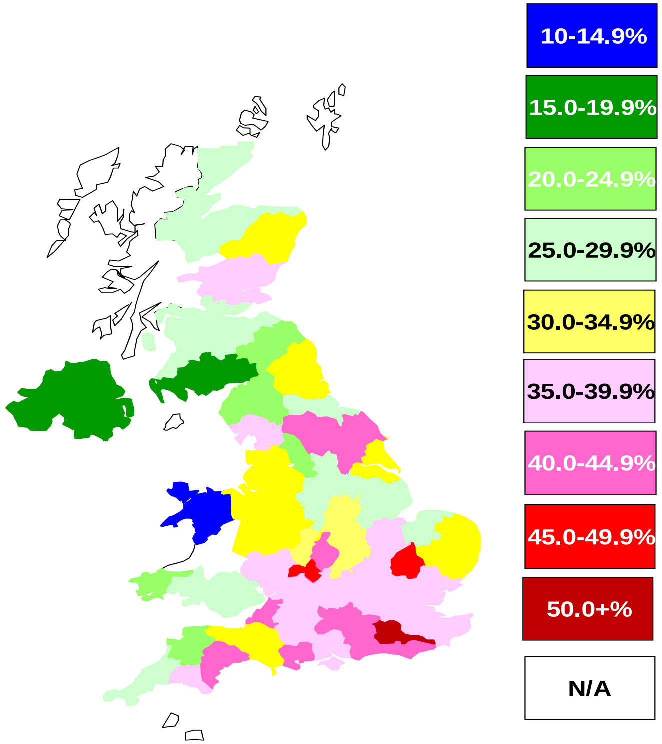
Source: Ofcom research on home radio ownership and vehicle figures from the Department of Transport
Note 1: In home radios includes hi-fis, portable radios and alarm clock radios.
Note 2: Data on the number of vehicles on UK roads, as reported by the Department of Transport in December 2009
Note 3: Due 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 2000-2010.
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 radios including a DAB digital radio tuner uses GfK sales data, June 2010 (11mdevices sold in 10 years).

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



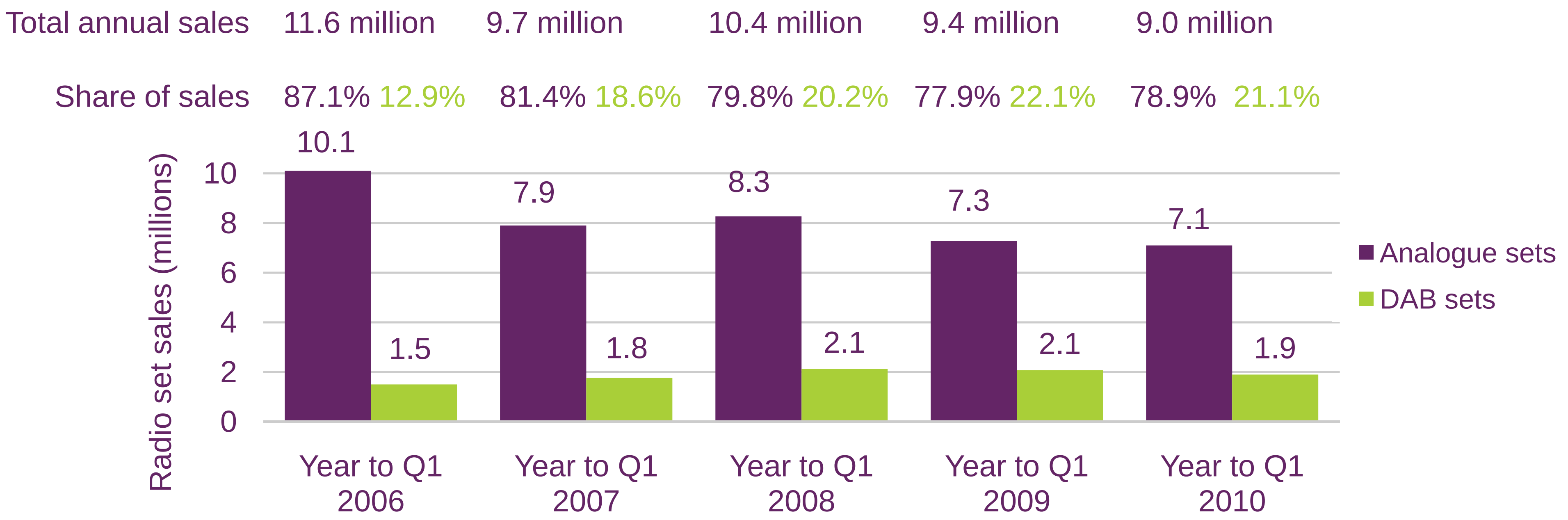
Source: RAJAR / Ipsos MORI / RSMB Q1 2010

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



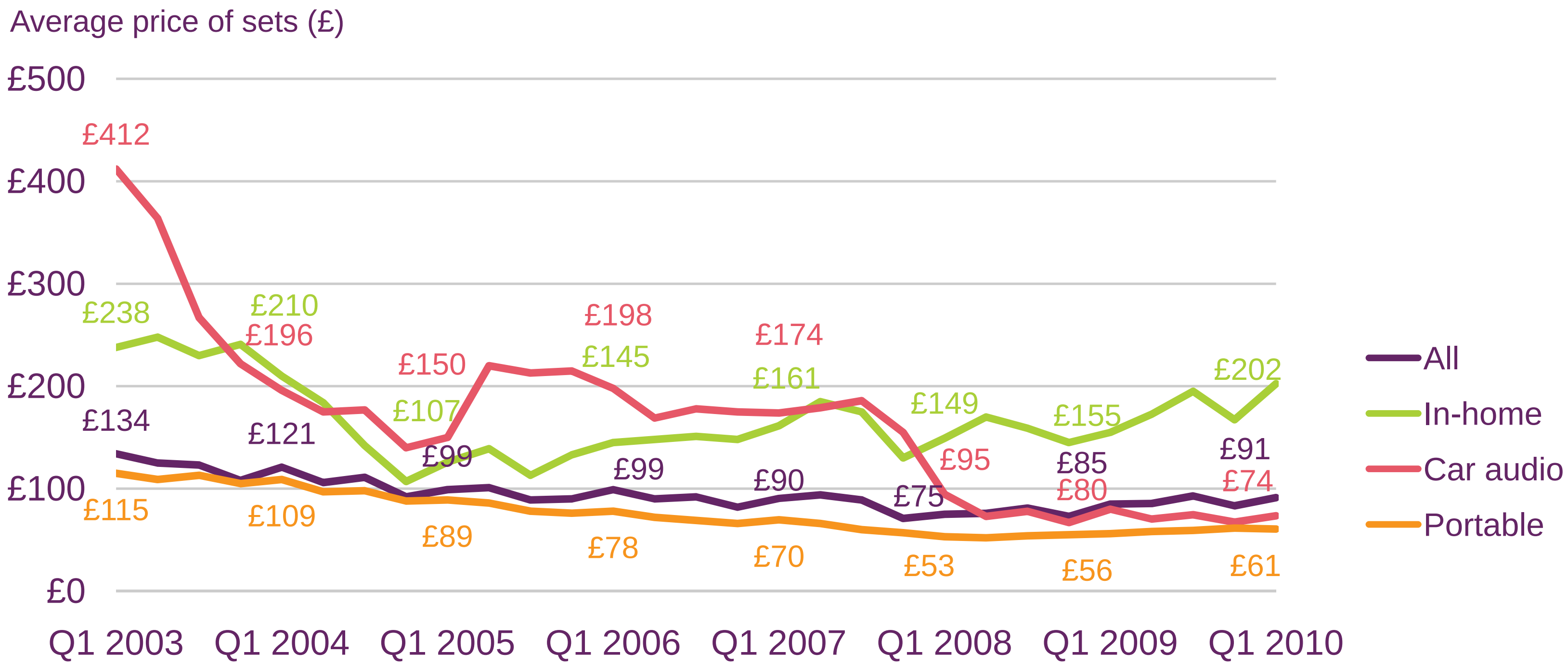
Source: Ofcom / RAJAR / Octagon Q1 2010

Figure 14: Number of analogue and digital radio sets sold



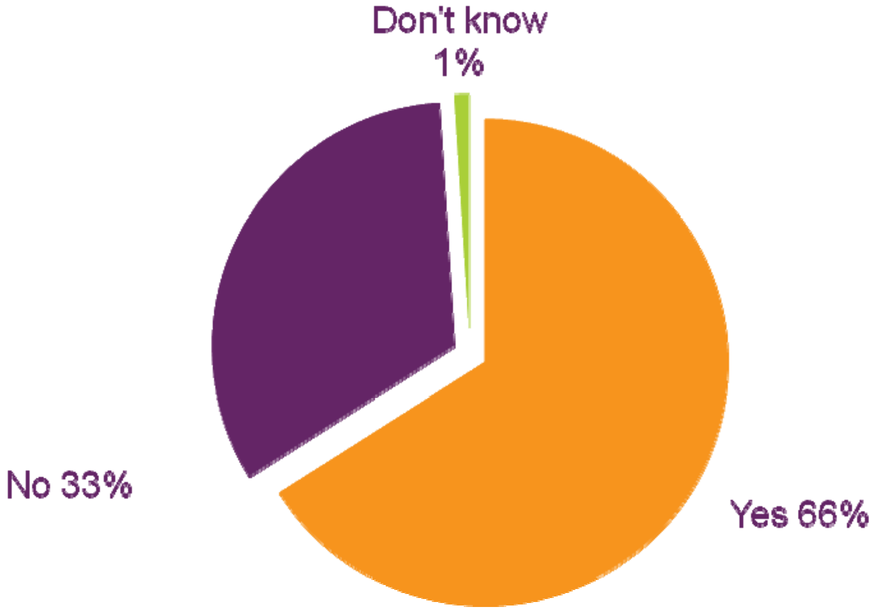
Source: GfK sales data, 2005-2010

Figure 15: Average price of DAB digital radio receivers



Source: GfK sales data 2003-2010

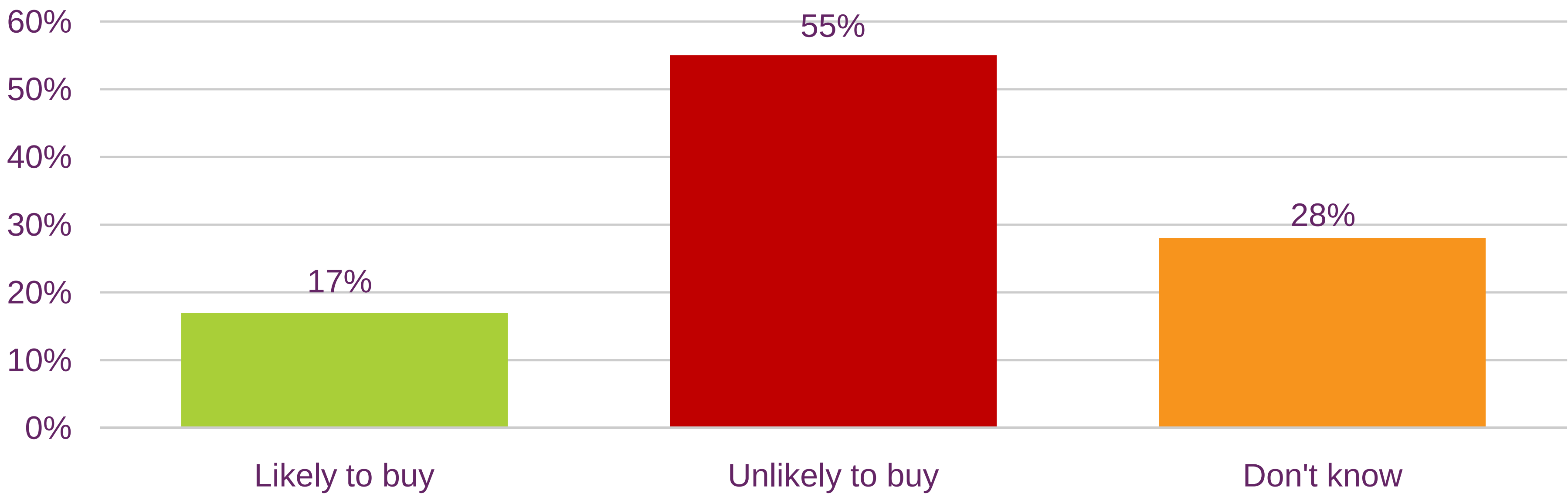
Figure 16: Have you heard of the term 'DAB digital radio'?



Source: Ofcom research May 2010
Base: 1075 UK adults
Q: Have you ever heard of the term 'DAB digital radio' or seen this logo before today?

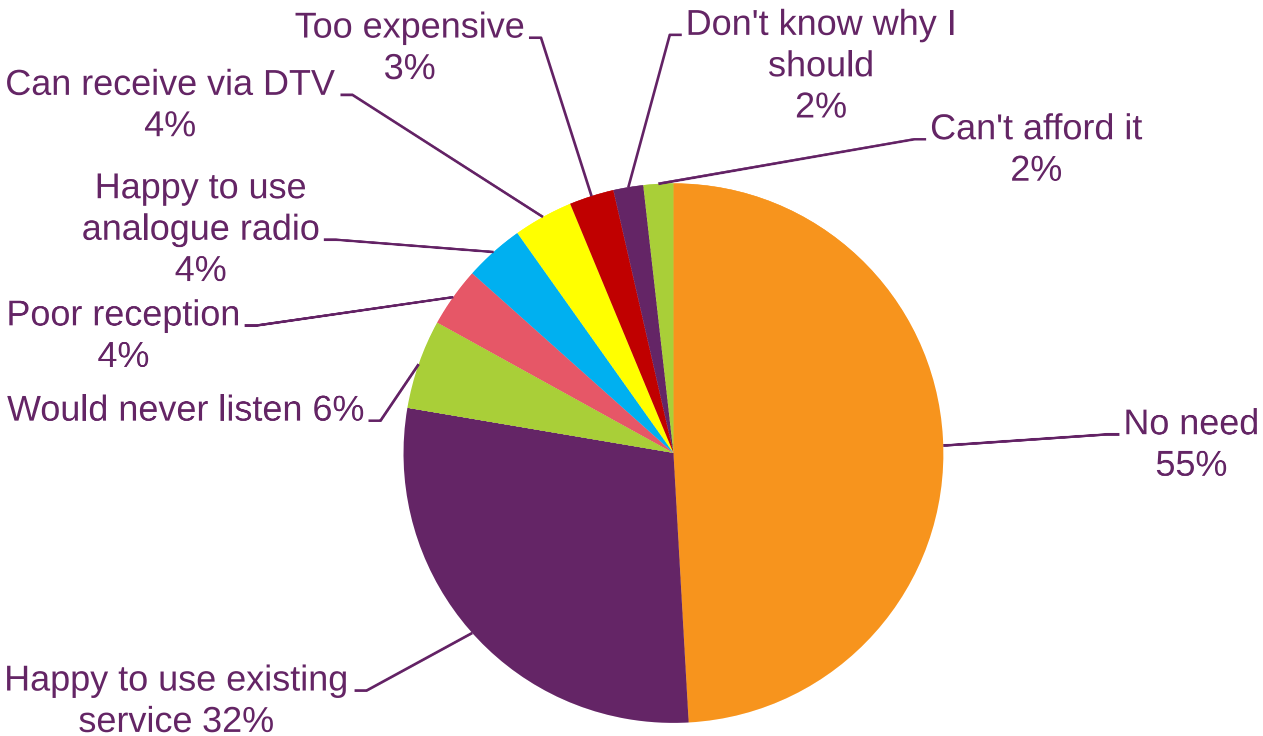
Figure 17: Likelihood to purchase a DAB set, Q1 2010

% of those who do not currently have access to DAB at home (%)



Source: Ofcom research, Q1 2010
Base: Those who listen to the radio but have no DAB sets in the home (n=)
Q: How likely is it that your household will get a DAB radio in the next 12 months?

Figure 18: Reasons for not acquiring a DAB digital radio set, Q1 2010



Source: Ofcom research, Q1 2010
Base: Those who listen to the radio but have no DAB sets in the home (n=)
Q: How likely is it that your household will get a DAB radio in the next 12 months?

Figure 19 Number of UK radio stations broadcasting on analogue (excluding community radio), July 2010

Type of station	AM	FM	Total analogue [1]
Local commercial	31	203	234
UK-wide commercial	2	1	3
BBC UK-wide networks	1	4	5
BBC local and nations	36	46	46
TOTAL	**70**	**254**	**288**

Source: Ofcom, July 2010

[1] In total there are 288 individual analogue services as 36 BBC stations are simulcast over both AM/FM wavebands.

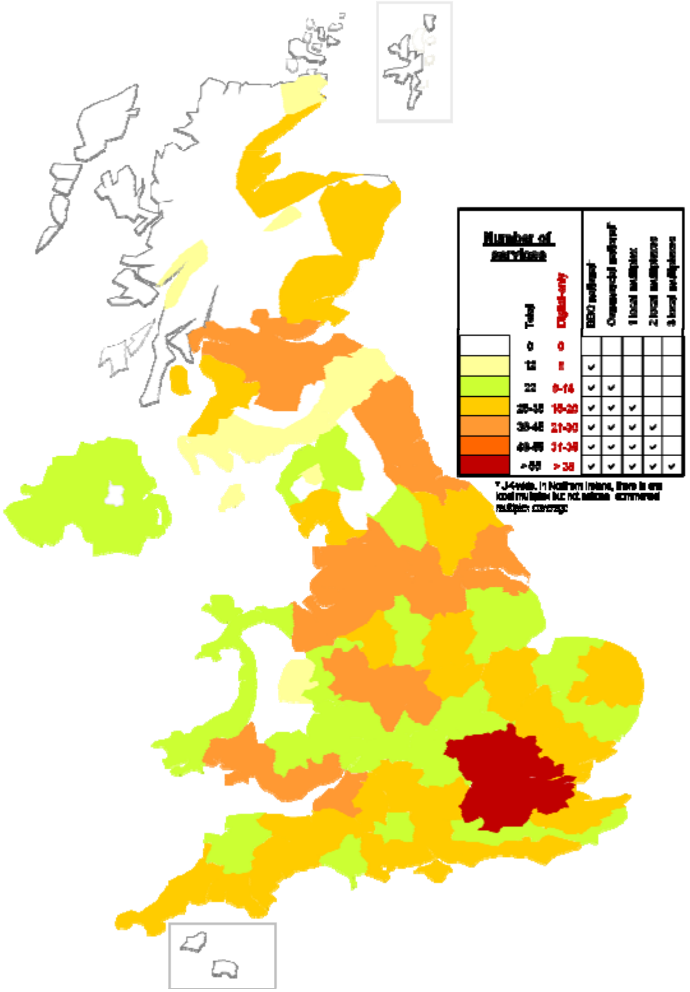
Figure 20 Number of UK radio stations broadcasting on DAB digital radio, July 2010

Type of station	Relation to analogue area	Number of stations
Local commercial	DAB in analogue area	84
	DAB extends analogue area	22
	DAB only	33
UK-wide commercial		7*
BBC UK-wide networks		11
BBC local and nations		32
TOTAL		**189**

Source: Ofcom, July 2010

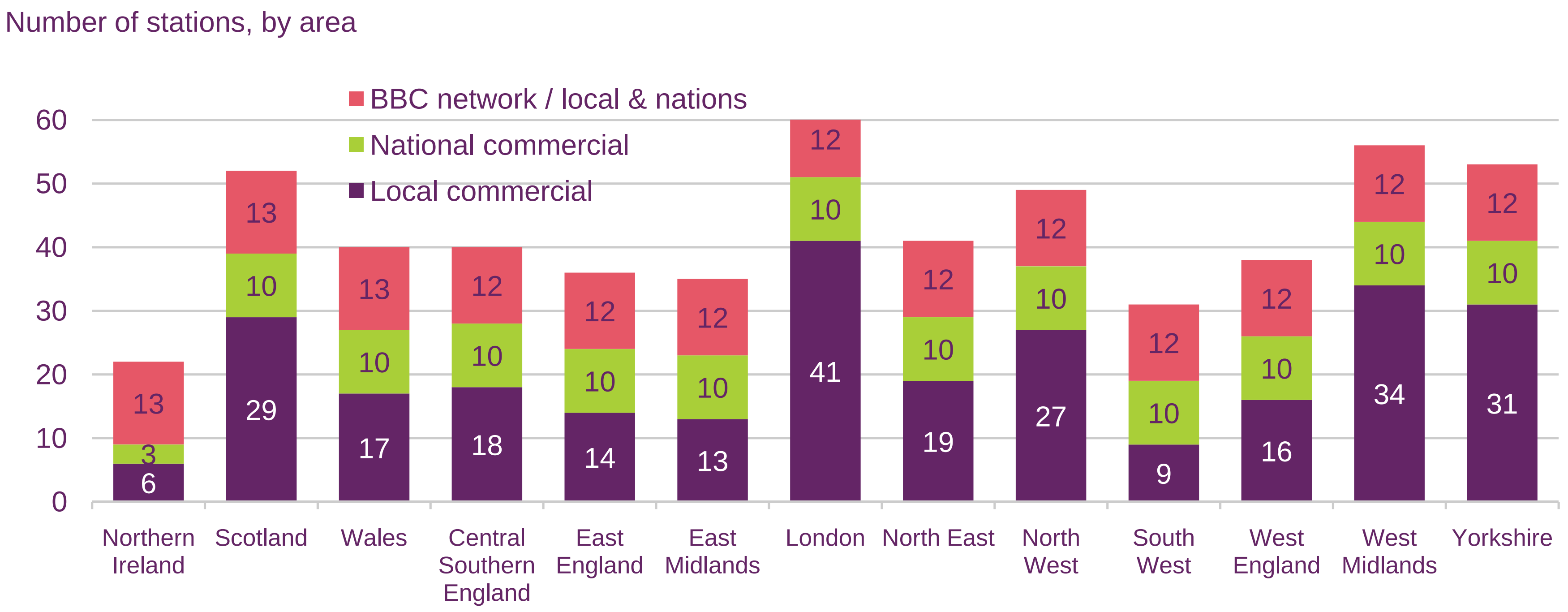
Note: Number of stations is 'unique stations', rather than brands. This includes any station with more than four hours a day of separate programming.

Figure 21: Number of services available on DAB, by area



Source: Ofcom July 2010

Figure 22: Availability of DAB stations, by area



Source: Ofcom, June 2010