

The Communications Market: Digital Radio Report

Ofcom's seventh annual digital progress report

29th November 2016

Figure 1

Estimated DAB coverage

Existing DAB coverage	Aggregate of local multiplexes		BBC national		Commercial national (Digital One)		Commercial national (Sound Digital Limited)	
	2016	2015	2016	2015	2016	2015	2016	2015
Households	c. 90%	77.8%	97.3%	96.4%	91.5%	89.8%	76.5%	-
Roads	c. 76%	70.7%	87.3%	86.3%	80.1%	c. 75%	66.5%	-

Source: Ofcom, Arqiva, BBC, November 2016

Note: "National" means UK-wide. Road coverage refers to motorways and A-roads

The network is in the process of being built out and the figures represent what we expect coverage to be when the current phase has been completed.

Figure 2

Existing FM coverage

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

Source: Ofcom, November 2016

Note: 'Variable' indicates that reception may be less than perfect quality; some artefacts will be present on the audio signal or there may be occasional short drop-outs.

Figure 3

Number of UK radio stations broadcasting on analogue, October 2016

Type of station	AM	FM	AM/FM total
Local commercial	51	235	286
UK-wide commercial	2	1	3
BBC UK-wide networks	1	4	5
BBC local and nations	34	44	46
Community radio	10	234	244
TOTAL	98	518	584

Source: Ofcom, October 2016. Note: the conditions of each licence will determine the amount of programming that may be shared between these licensed services. Here we have taken the view that a service providing at least four hours a day of separate programming (even if the same brand has other services) equals one service.

Figure 4

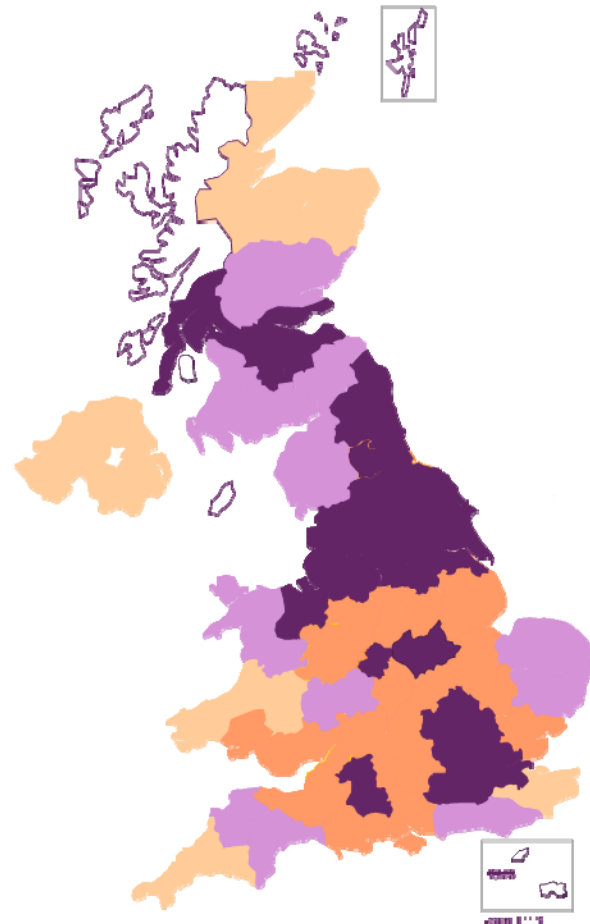
Number of UK radio stations broadcasting on DAB: October 2016

Type of station	Relation to analogue area	Number of stations
Local commercial	DAB in analogue area	136
	DAB extends analogue area	19
	DAB only	95
UK-wide commercial		32
BBC UK-wide networks		11
BBC local and nations		46
TOTAL		339

Source: Ofcom, October 2016

Figure 5

Number of services available on UK DAB, UK map

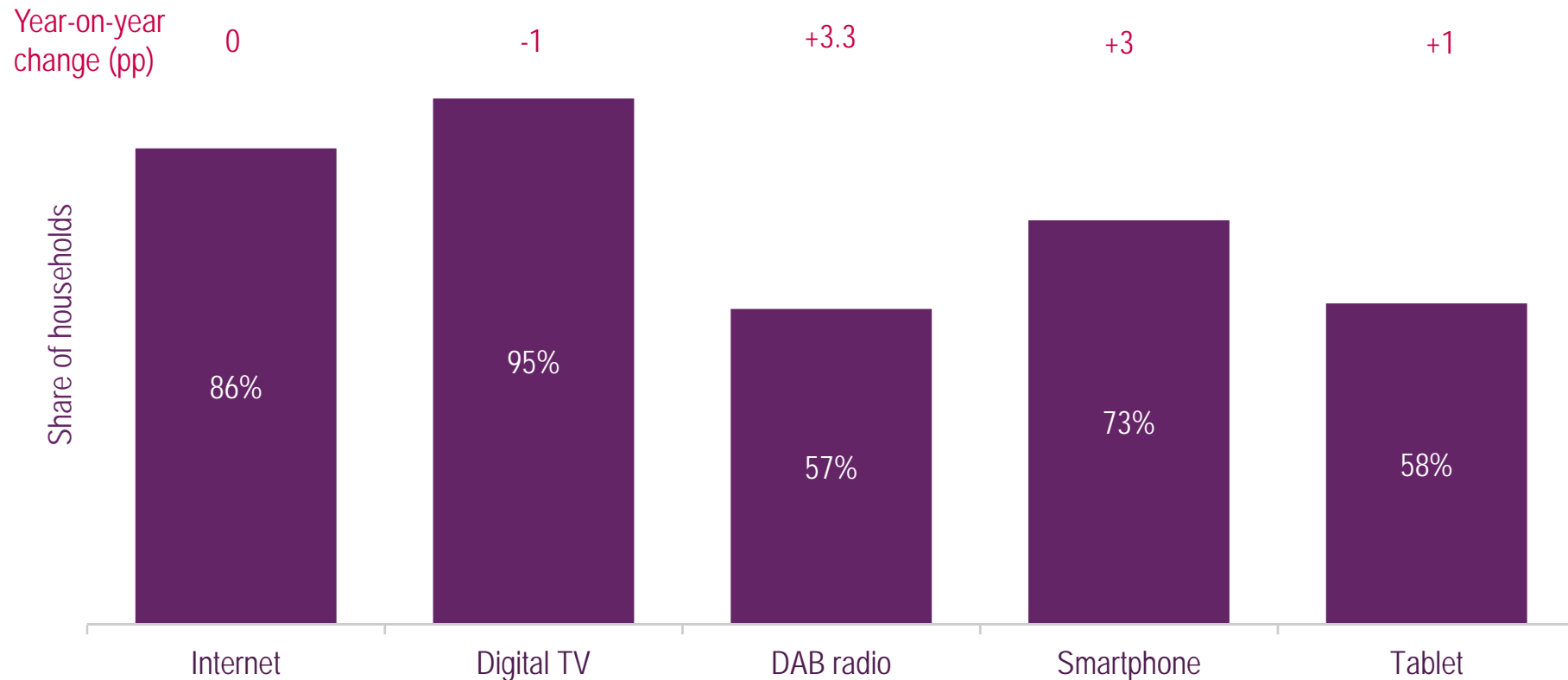


No. services	BBC national	Digital One (commercial)	Sound Digital (commercial)	No. local multiplexes
0 - 9				
10 - 19	-	-		-
20 - 29	-	-		1
30 - 39	✓	✓		2 (see note)
40 - 49	✓	✓		3
50+	✓	✓	✓	3

Source: Ofcom, November 2016. Note: the Tyne and Wear and Teesside areas have one multiplex each, but each of these multiplexes carry more services than most other local multiplexes.

Figure 6

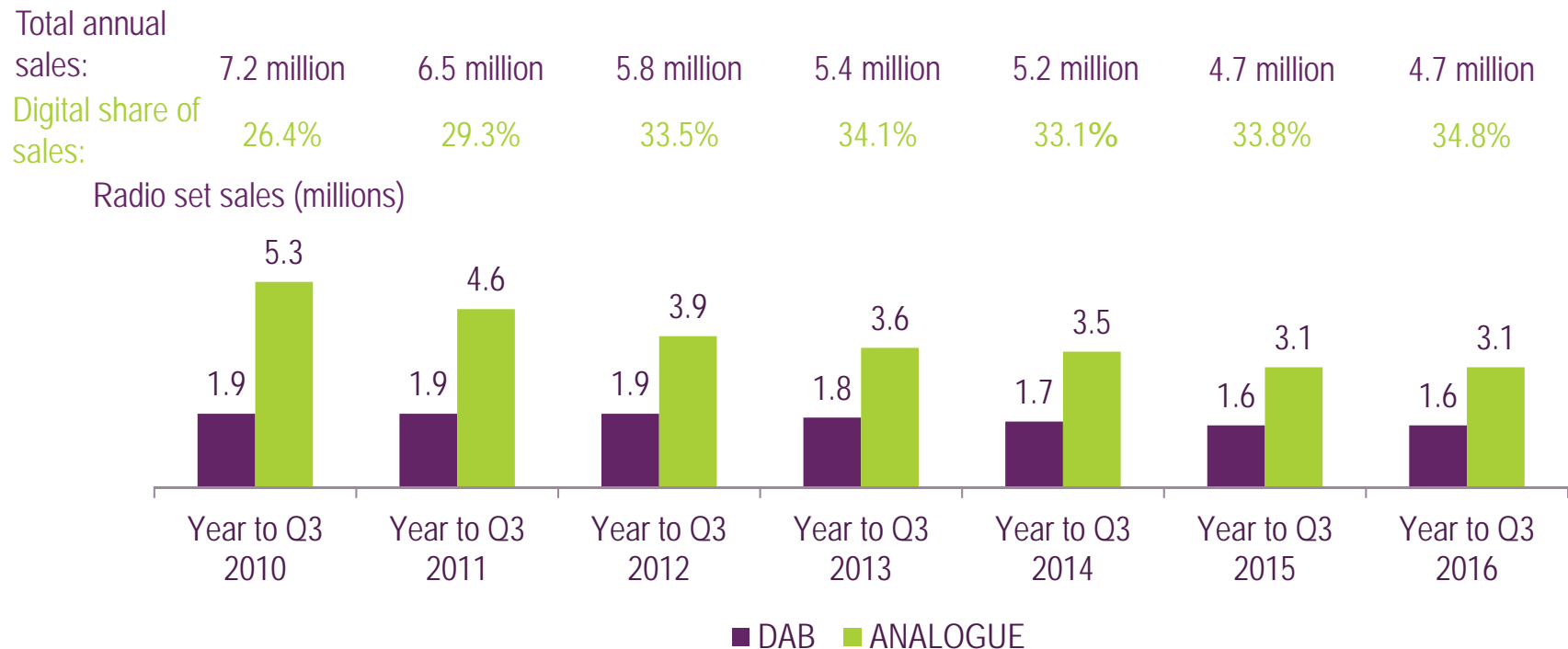
Take-up of equipment capable of receiving digital radio: 2016



Source: Ofcom Technology Tracker H2 2016 (Internet, Digital TV, Smartphone, Tablet); RAJAR Q3 2016 (DAB radio)
 Base: Adults 16+ (H2 2016, 2893)

Figure 7

Number of analogue and digital radio sets sold: year to Q3 2010-2016



Source: GfK sales data, 2010-2016.

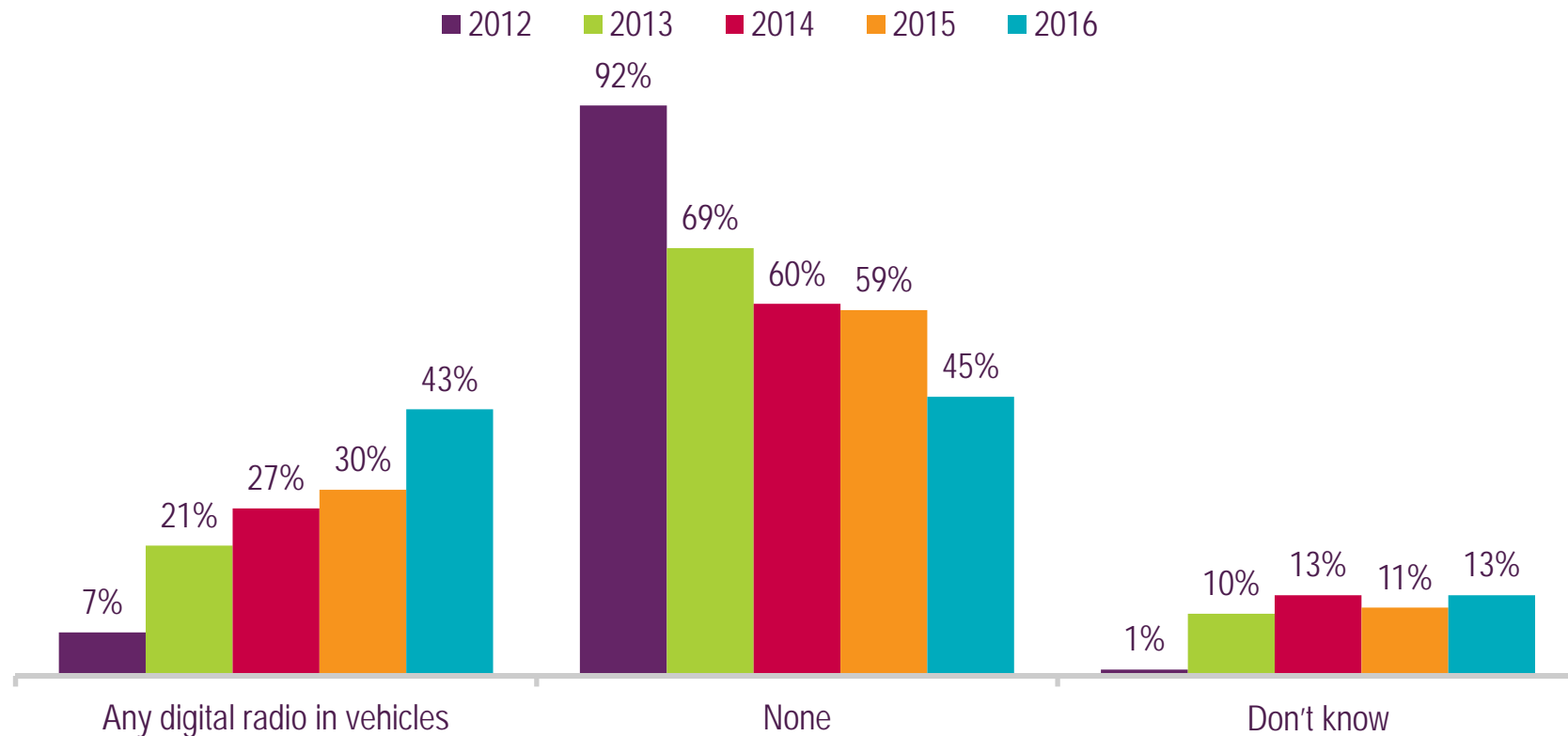
Note: Figures cover GB only, GfK Panelmarket data represents over 90% of the market. Categories of device included are; portable radios, personal media players, car audio systems, home audio systems, clock radios, radio recorders, headphone stereos, tuners and receivers.

The data has been restated from last year.

Figure 8

Proportion of drivers and passengers who use a vehicle with a digital radio

Proportion of drivers/passengers who use a vehicle that has a digital radio



Source: Ofcom Technology Tracker, data as at Q2 2012-2014; H2 2015-2016

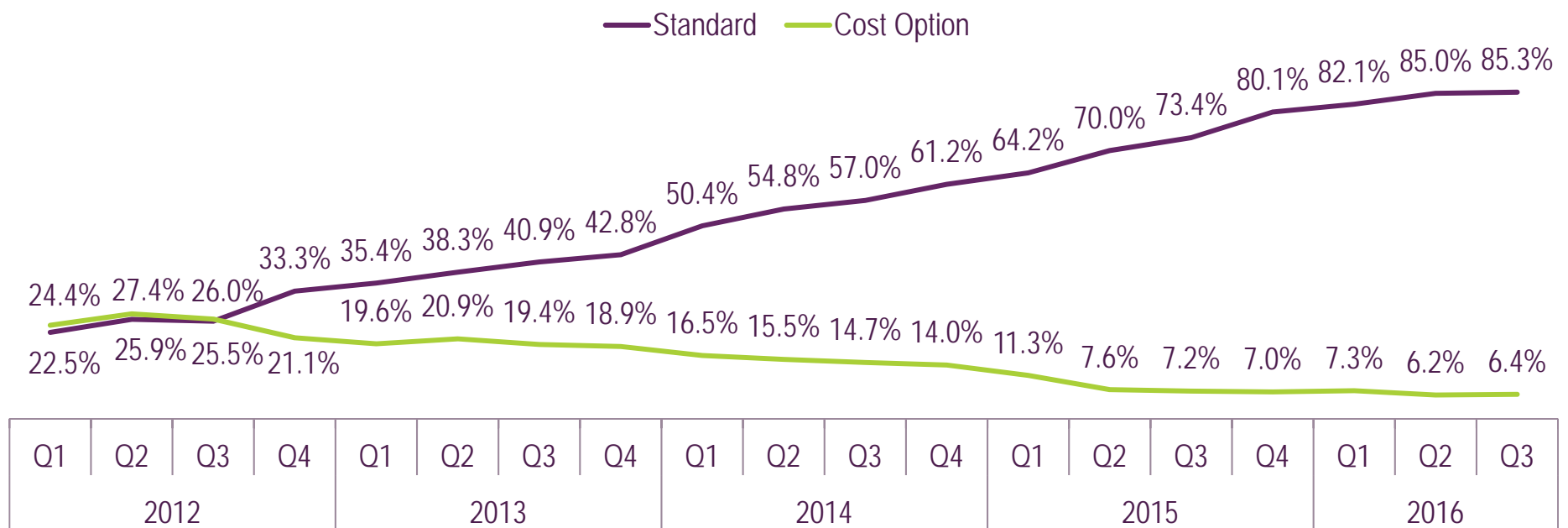
Q. Is the radio in this vehicle a digital radio?/ How many of the radios in those vehicles are digital radios?

Base: Those who use at least one motor vehicle with a radio in most weeks: Q2 2012 (1756), Q2 2013 (1709), Q2 2014 (1769), H2 2015 (2107), H2 2016 (2070)

Figure 9

Status of digital radio availability in newly registered cars

Proportion of newly registered cars (%)

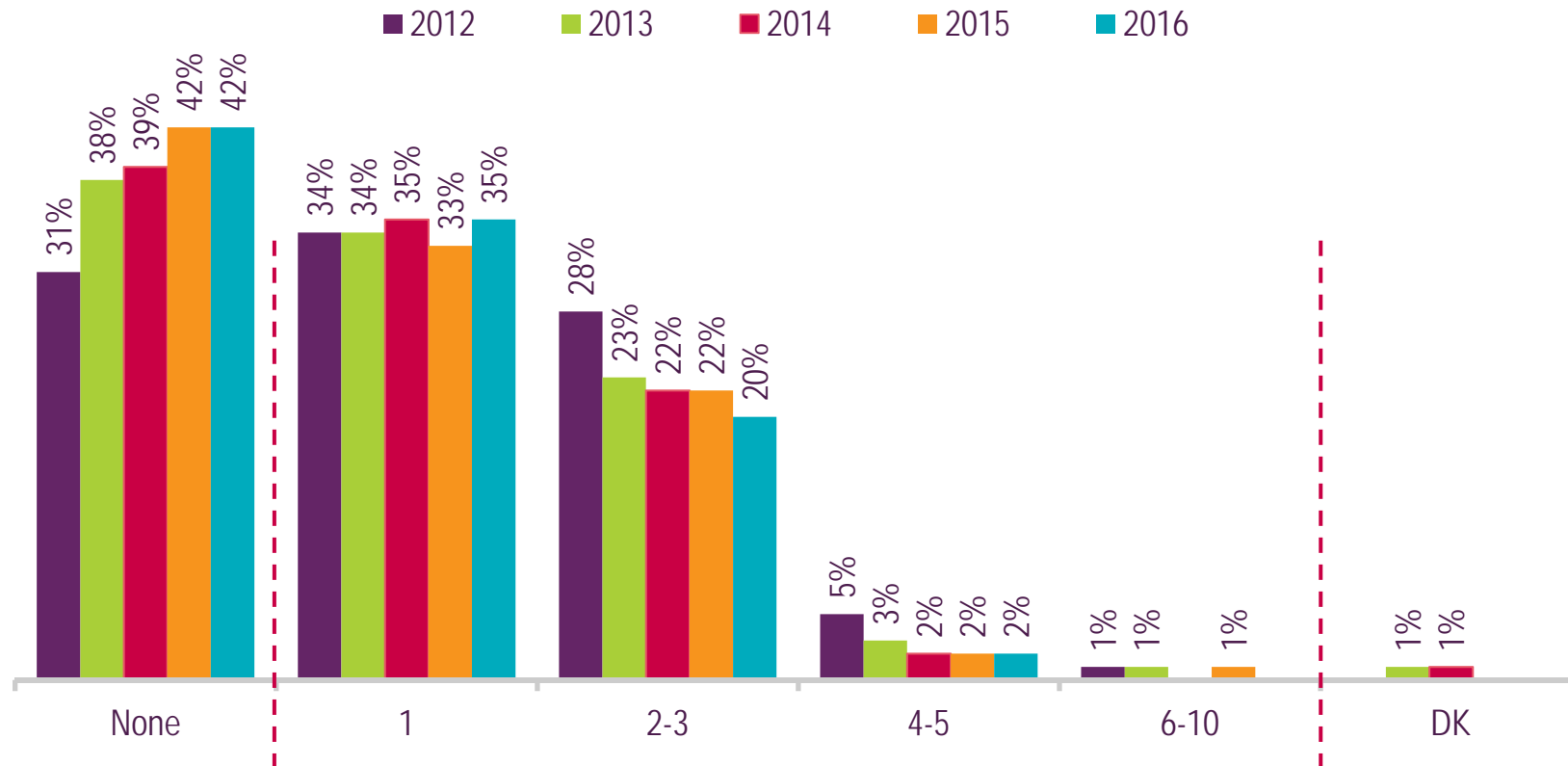


Source: CAP/SMMT

Figure 10

Number of radios listened to at home 'in most weeks'

Proportion of households %

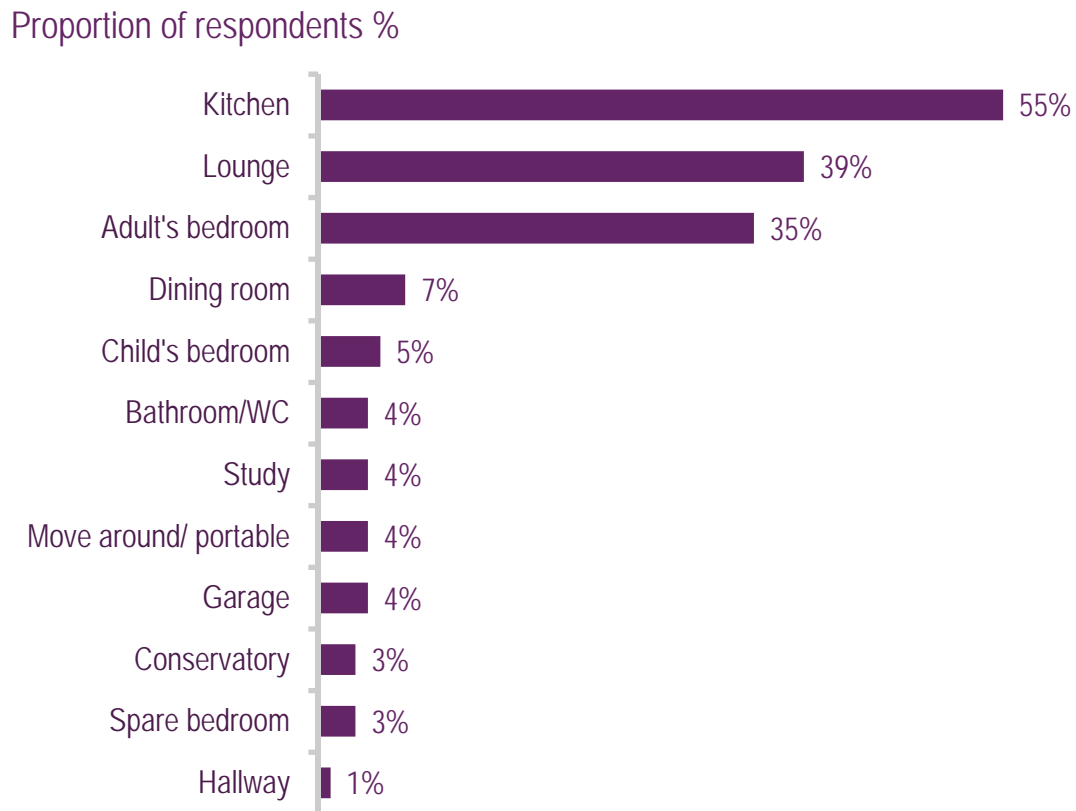


Source: Ofcom Technology Tracker, data as at Q2 2012-2014; H2 2015-2016

Base: All adults (Q2 2012, 2893), (Q2 2013, 2879), (Q2 2014, 2877), (H2 2015, 2863) (H2 2016, 2893)

Q. In total, how many radio sets do you have in your home that you, or someone in your household, listen to in most weeks?

Figure 11
The location of radio sets in the home

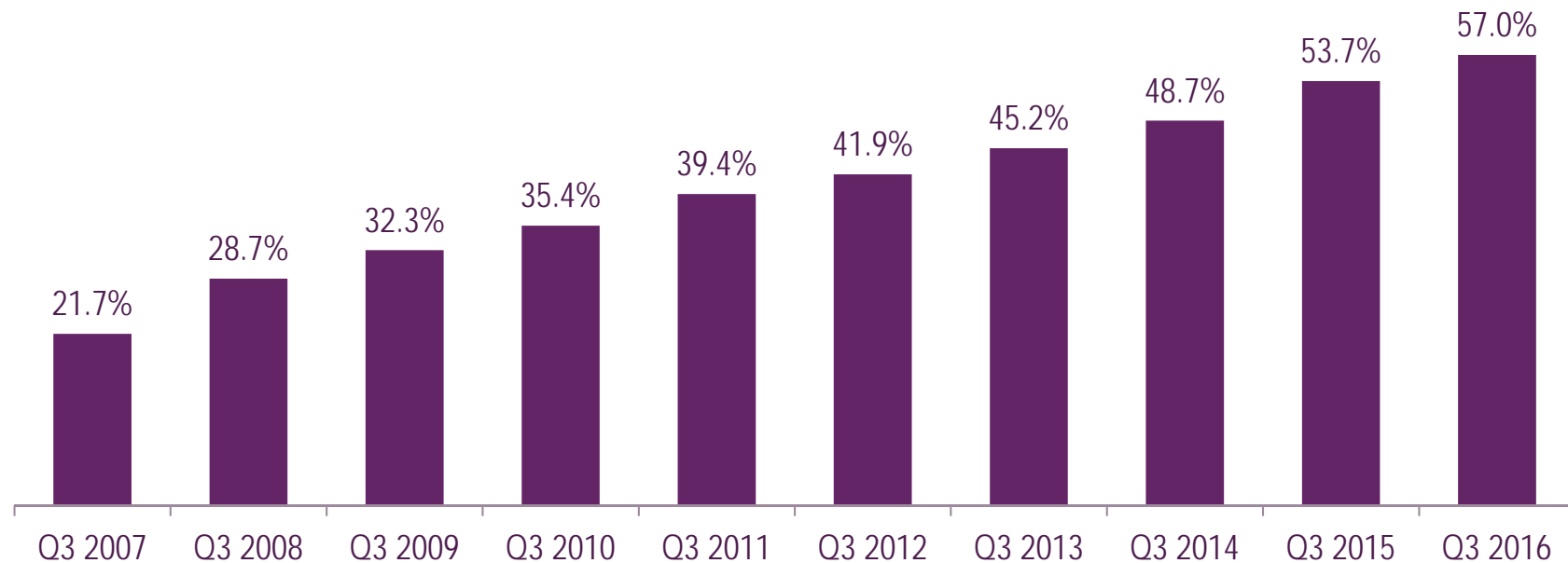


Source: Ofcom Technology Tracker, H2 2016
 Base: Owners of radio sets in their home (H2 2016, 1824)
 Q. In which of these rooms at home do you have any radios?

Figure 12

Proportion of individuals claiming to own a DAB set in the home

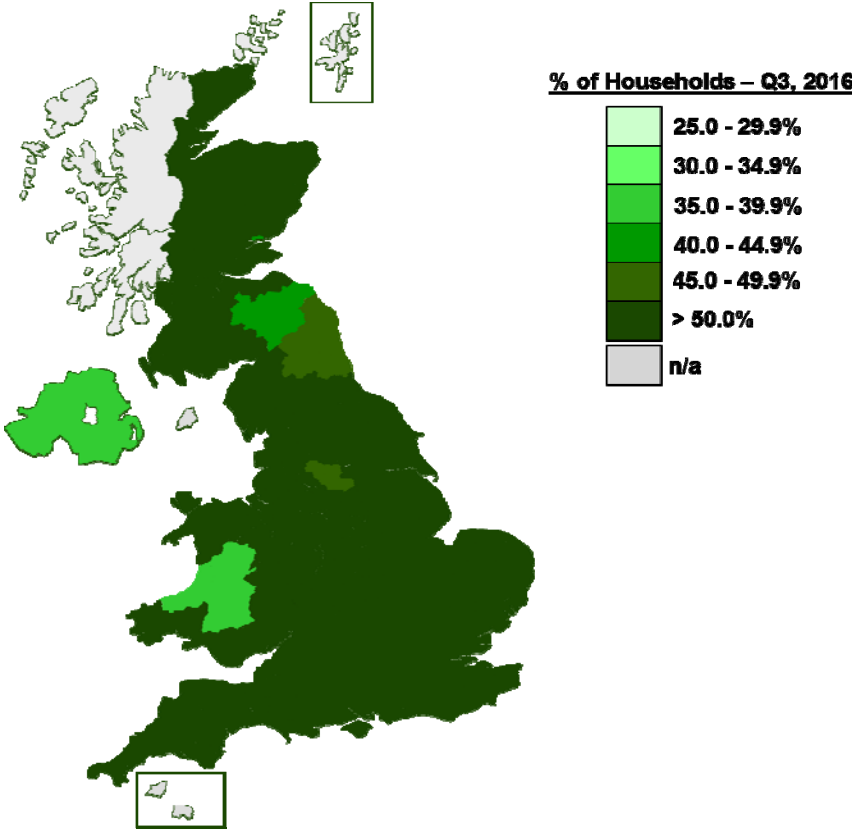
Proportion of adults (15+)



Source: RAJAR / Ipsos MORI / RSMB

Figure 13

Take-up of DAB digital radio, by multiplex area



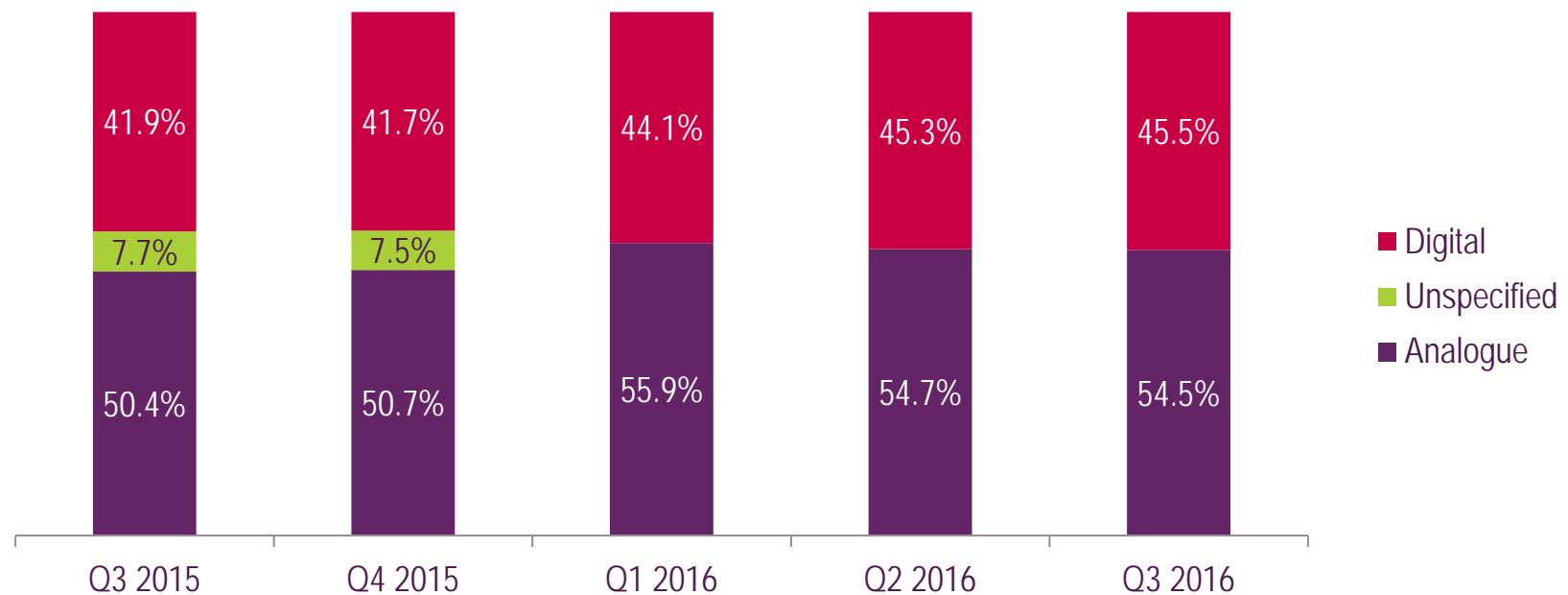
Source: RAJAR, Q3 2016

Note: this map is based on analysis which uses the total survey area of the individual station which best represents the coverage area of each digital multiplex.

Figure 14

Distribution of listening hours across analogue and digital platforms, by quarter: Q3 2015 – Q3 2016

Share of total listening hours

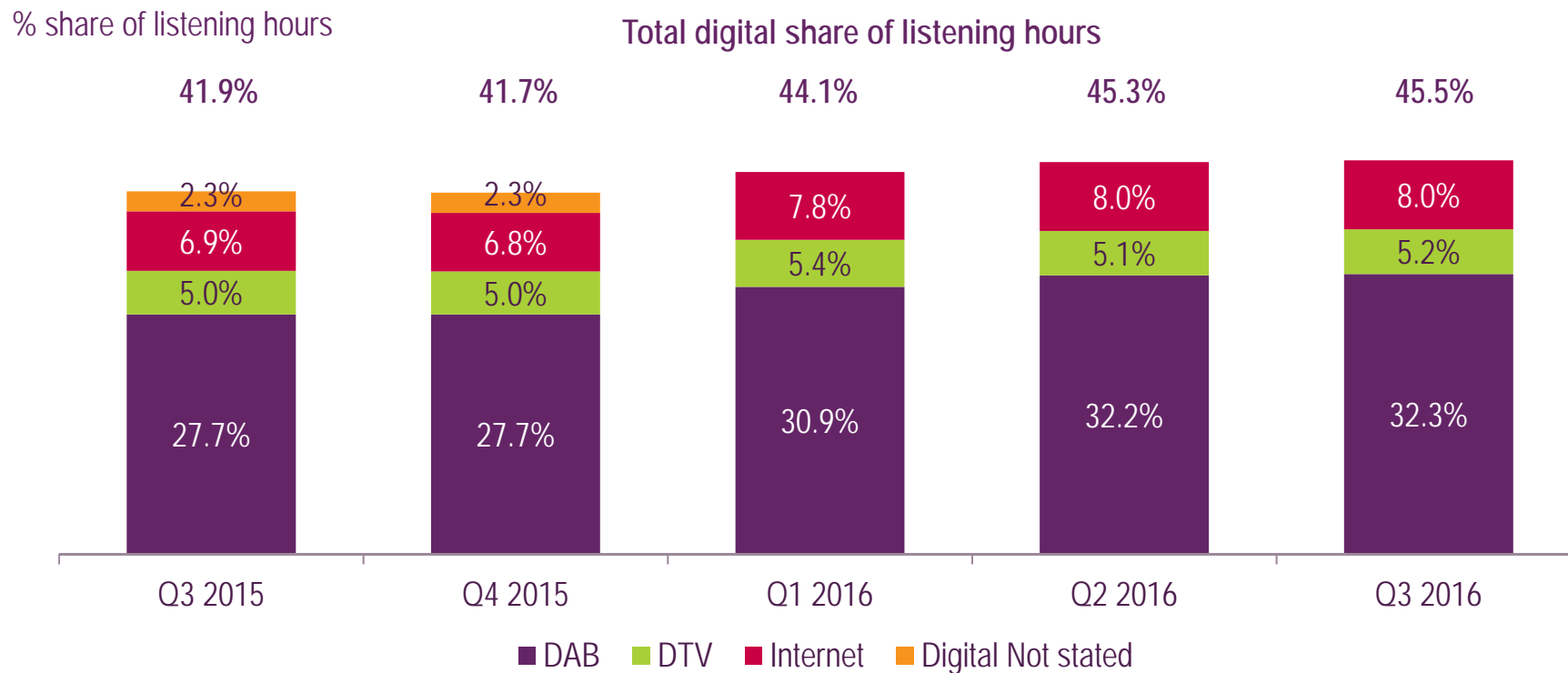


Source: RAJAR. All adults (15+)

Note: 'Unspecified' relates to listening where the radio platform was not confirmed by the listener.

Figure 15

Distribution of listening hours across digital platforms, by quarter: Q3 2015 – Q3 2016



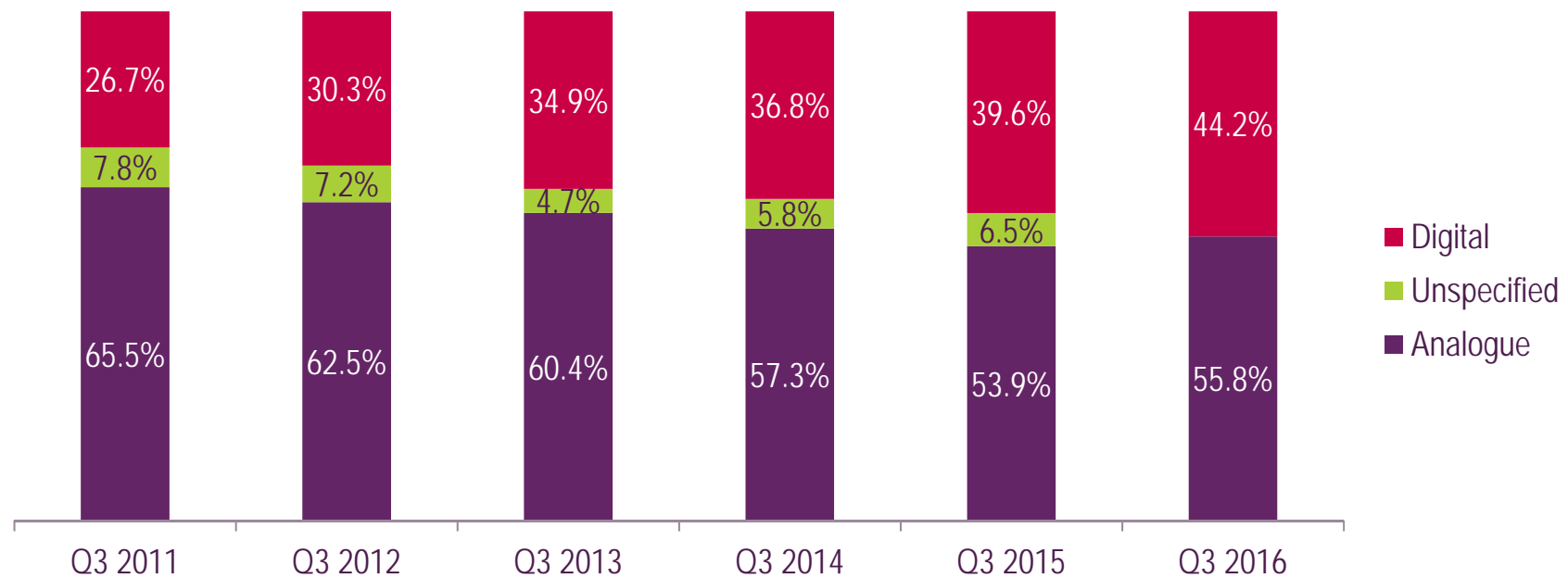
Source: RAJAR. All adults (15+)

Note: 'Digital unspecified' relates to listening to digital-only stations where the survey respondent has not specified the listening platform used.

Figure 16

Distribution of listening hours across analogue and digital platforms, 12 months to Q3: 2011 – 2016

Share of total listening

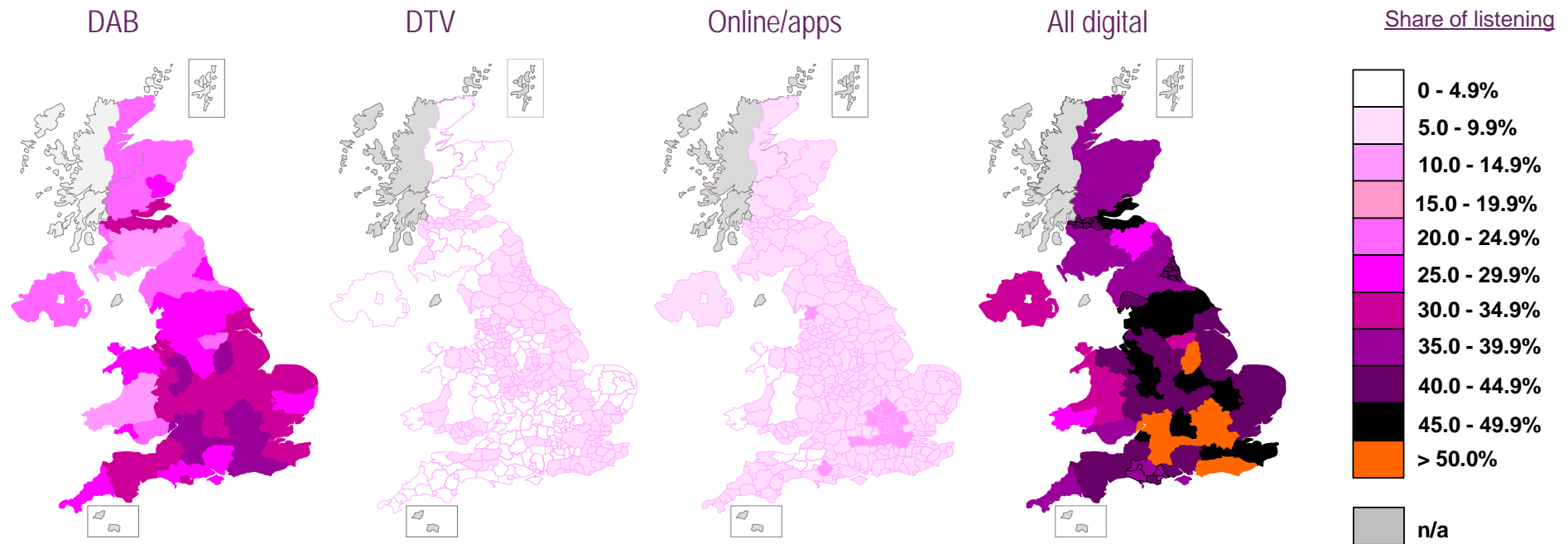


Source: RAJAR. All adults (15+)

Note: 'Unspecified' relates to listening where the radio platform was not confirmed by the listener

Figure 17

Share of listening, by digital platform and area

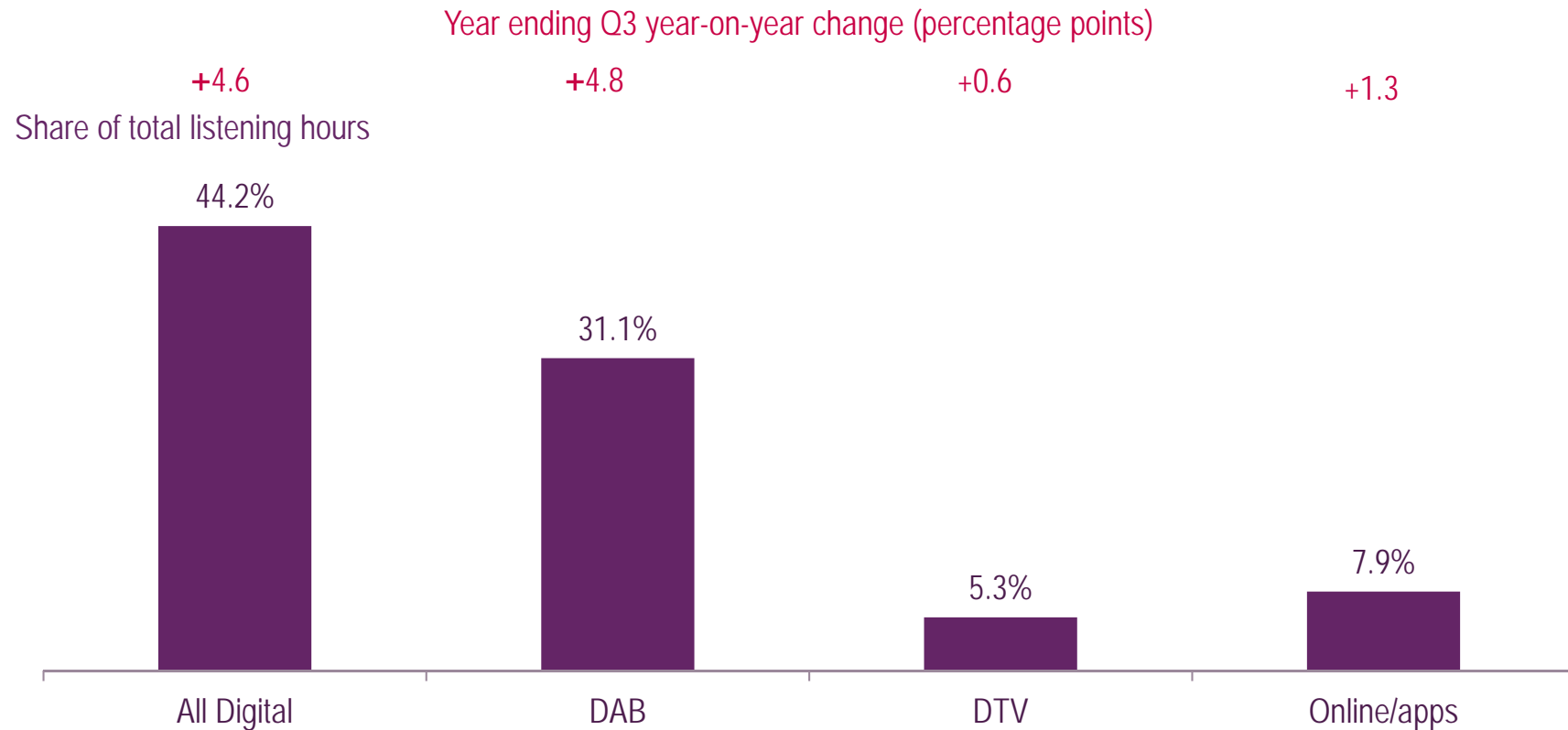


Source: RAJAR, Q3 2016

Note: these maps are based on analysis which uses the total survey area of the individual station which best represents the coverage area of each digital multiplex

Figure 18

Digital radio's share of total radio listening hours, by platform

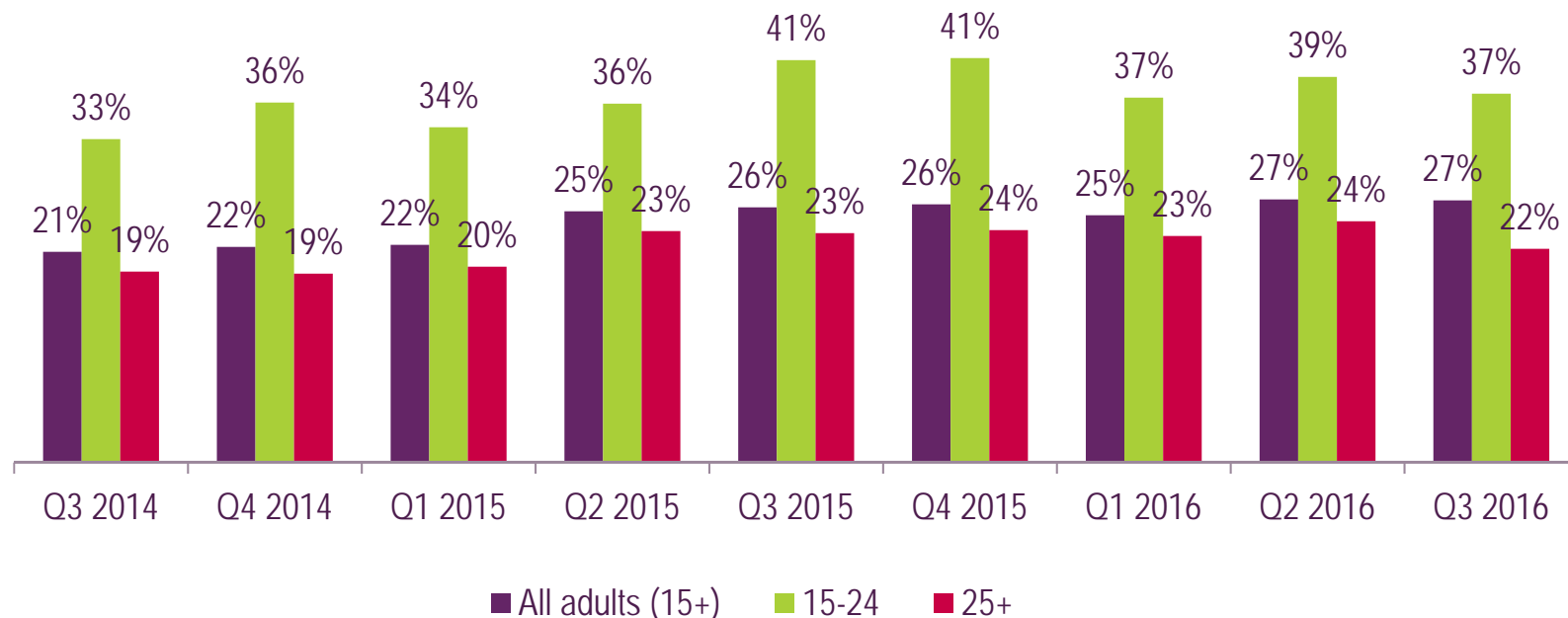


Source: RAJAR. All adults (15+), 12 months to Q3 2016

Figure 19

Proportion of individuals who claim to listen to radio on a mobile phone or tablet at least once per month

Proportion of individuals (%)



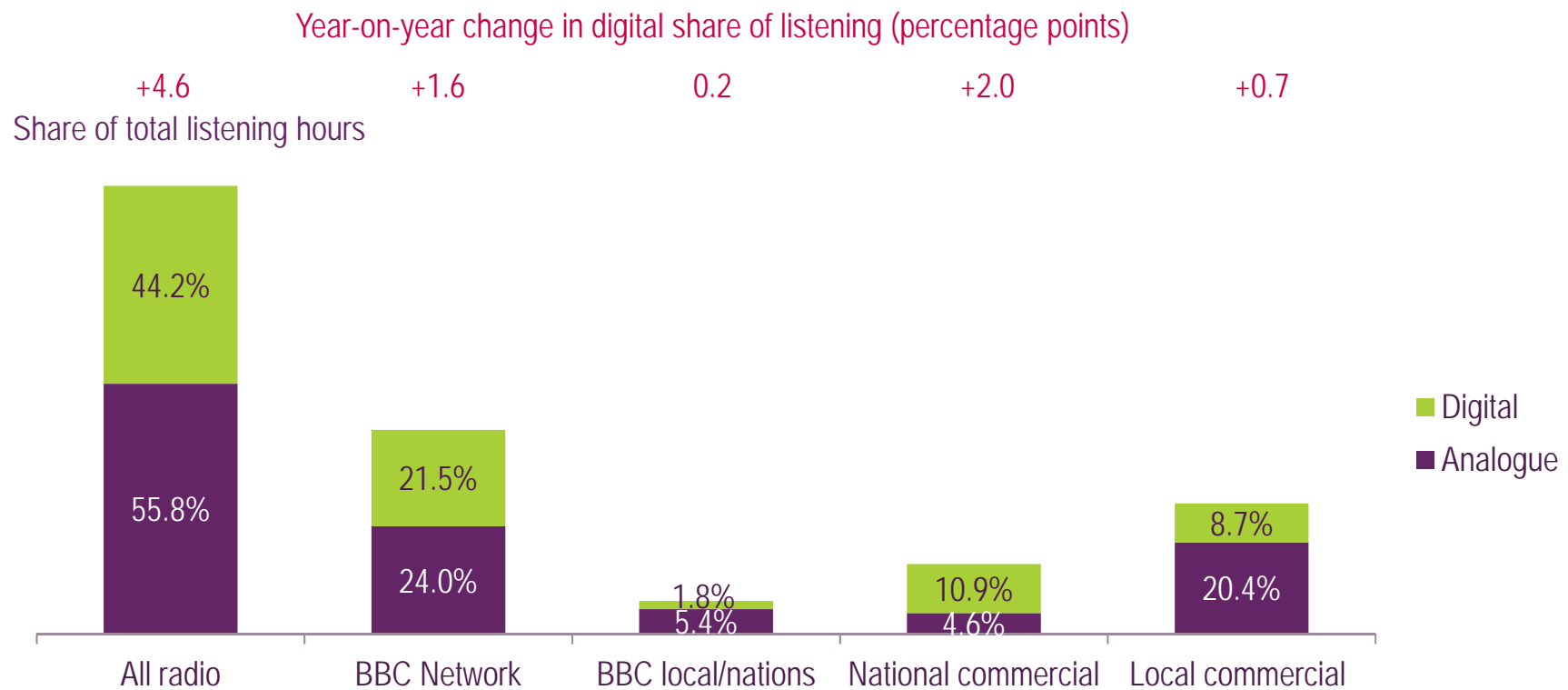
Source: RAJAR / Ipsos MORI / RSMB

Note: As of Q1 2014 the figures include listening via a tablet

As of Q3 2015 this data has been derived via an alternative methodology

Figure 20

Distribution of listening hours, by service provider, analogue and digital platforms: year to Q3 2016

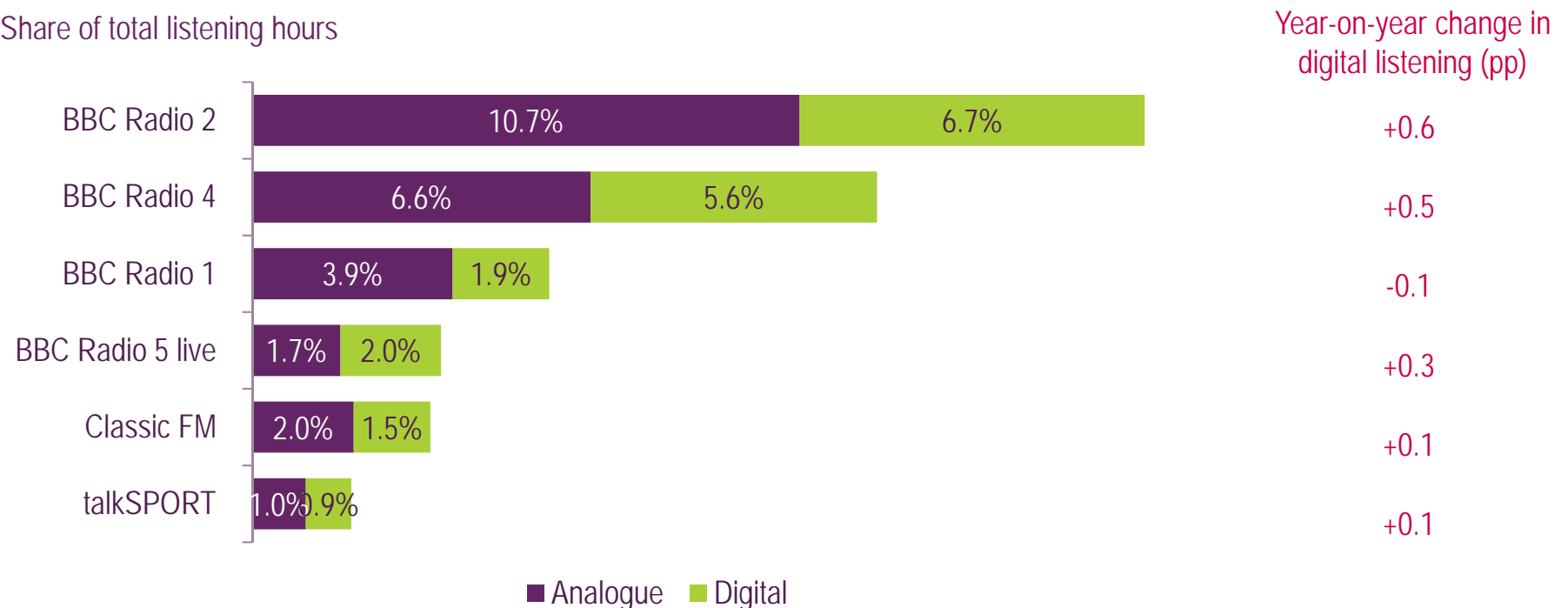


Source: RAJAR, All adults (15+), 12 months to Q3 2016

Figure 21

Distribution of listening hours, by service, analogue and digital platforms: year to Q3 2016

Share of total listening hours



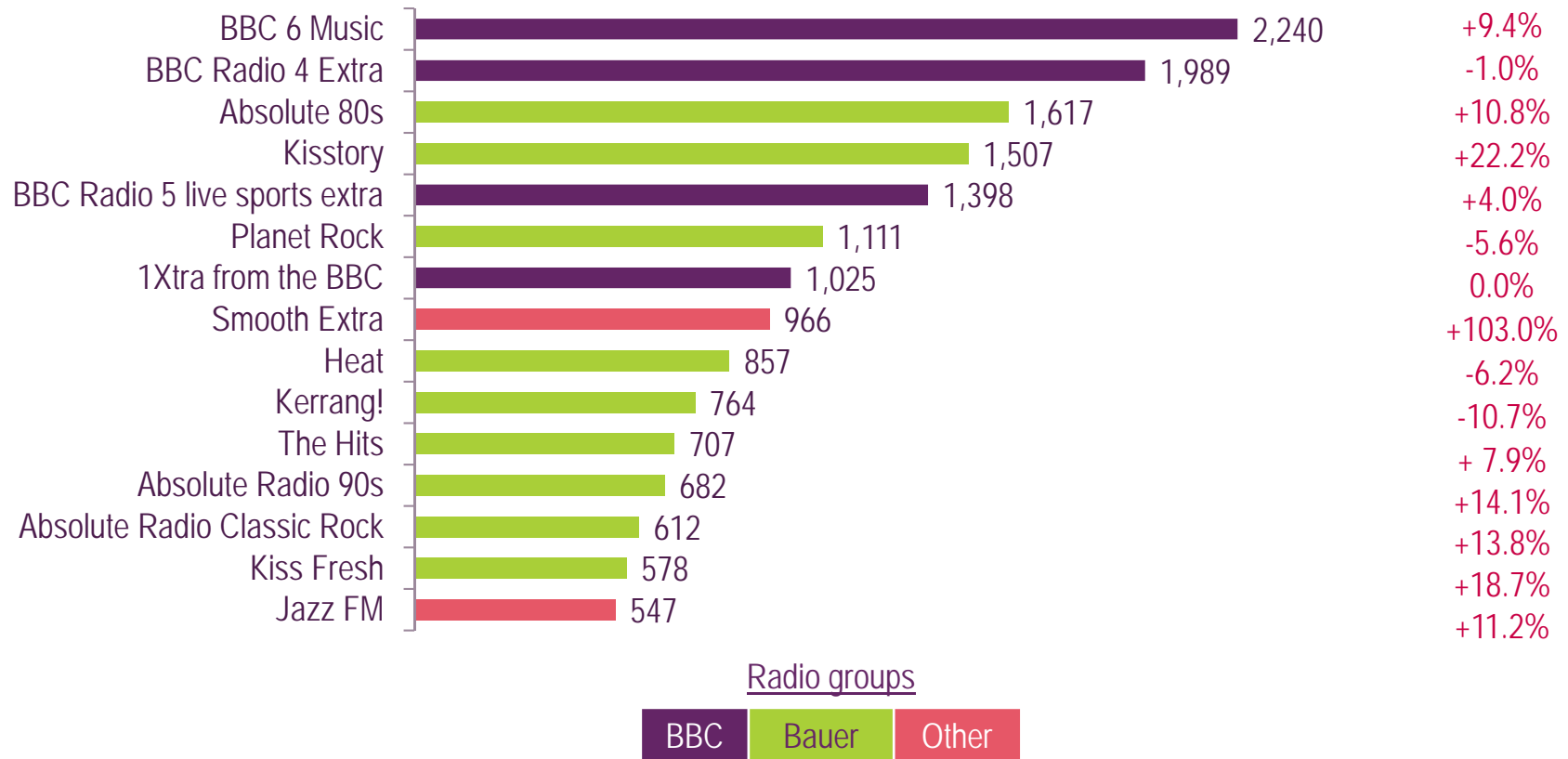
Source: RAJAR, All adults (15+), 12 months to Q3 2016

Figure 22

Digital-only stations, by average weekly reach

Average weekly reach (thousands)

Year-on-year change

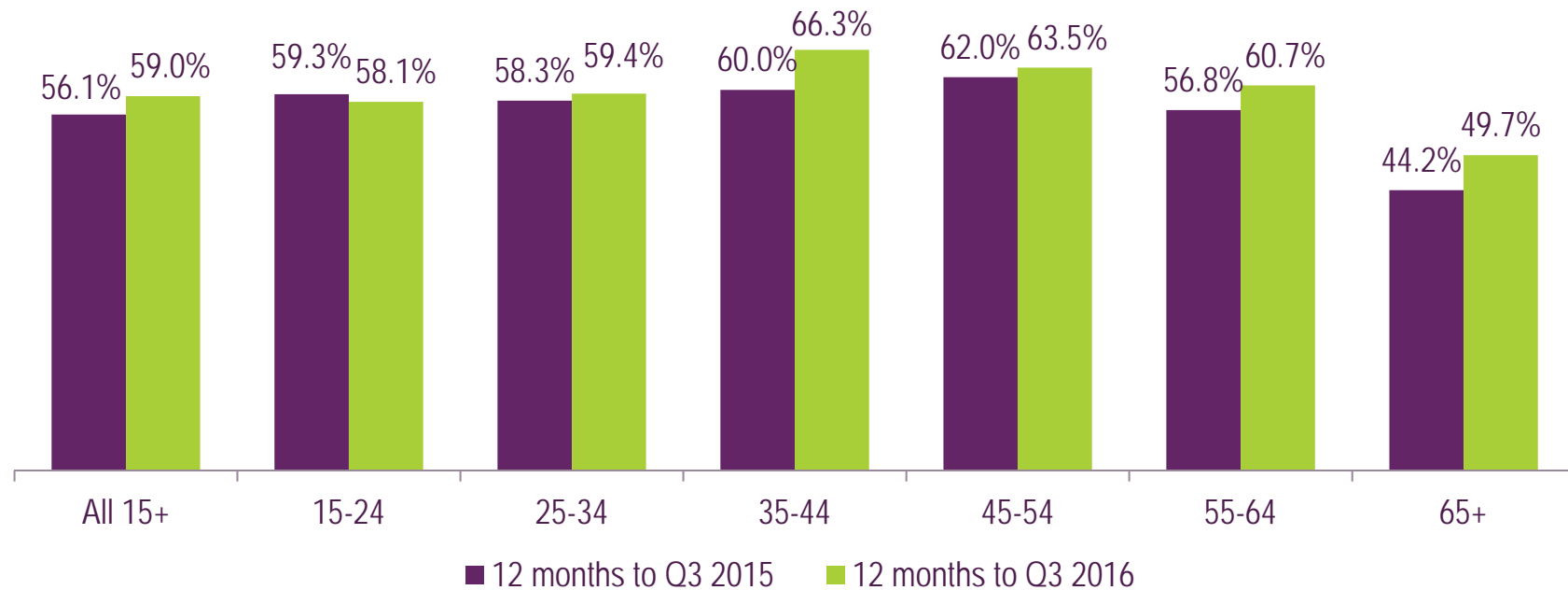


Source: RAJAR, All adults (15+), 12 months to Q3 2016

Figure 23

Weekly listening to radio through a digital platform, by age group

Radio listeners (%)

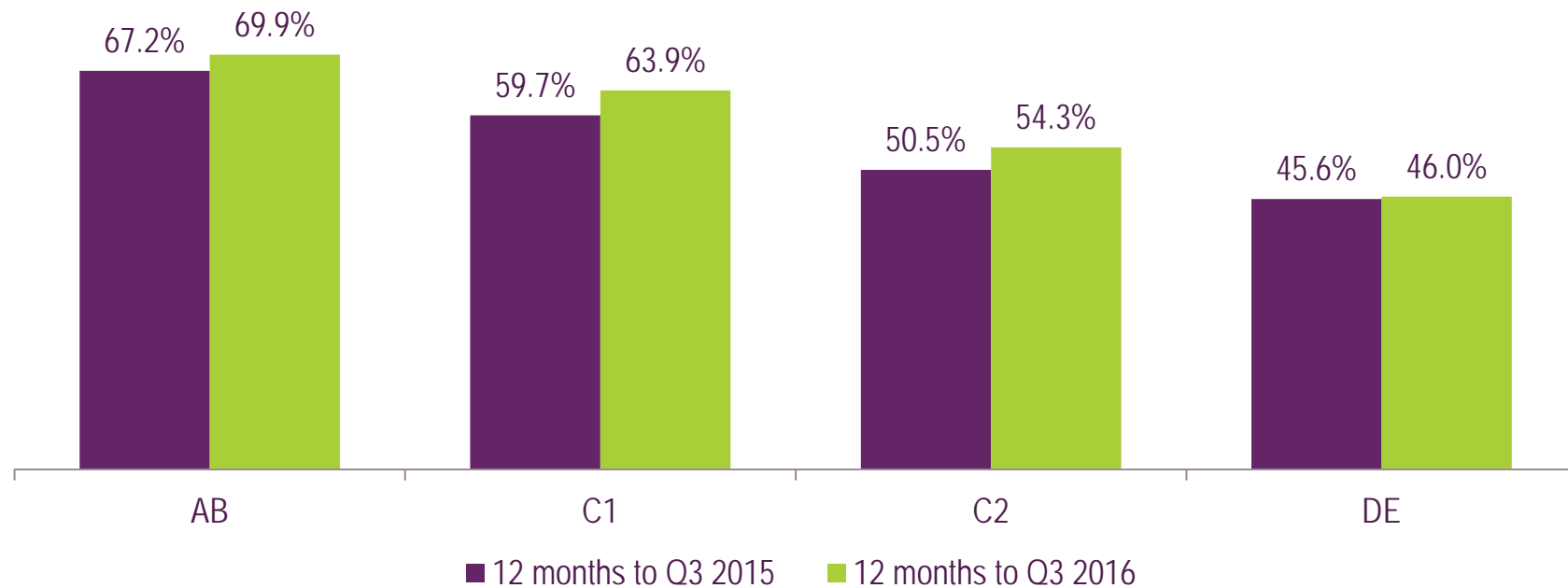


Source: RAJAR, All adults (15+), 12 months to Q3 2016

Figure 24

Weekly listening to radio through a digital platform, by socio-economic group

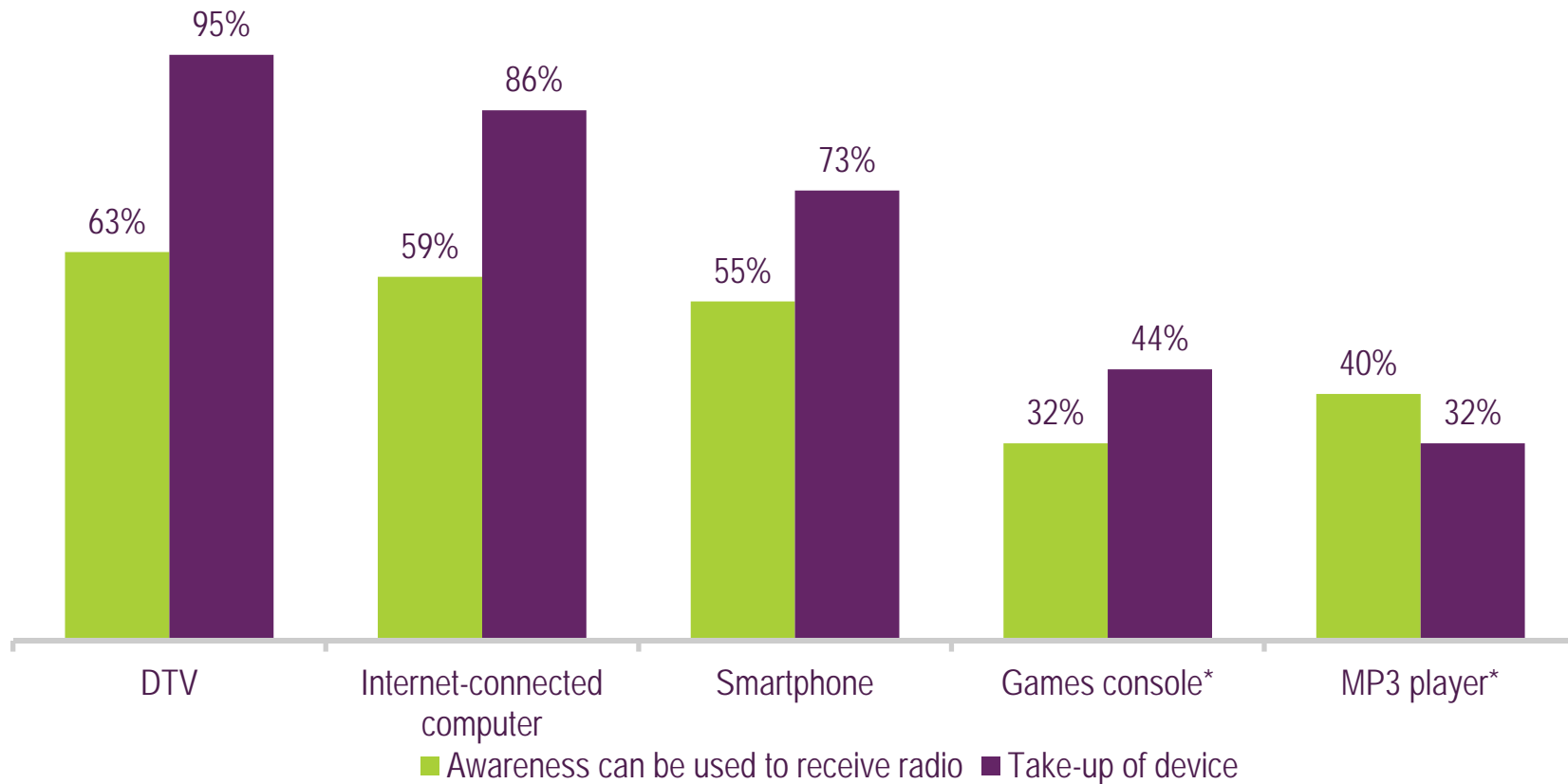
Radio listeners (%)



Source: RAJAR, All adults (15+), 12 months to Q3 2016

Figure 25

Awareness of devices capable of receiving radio services



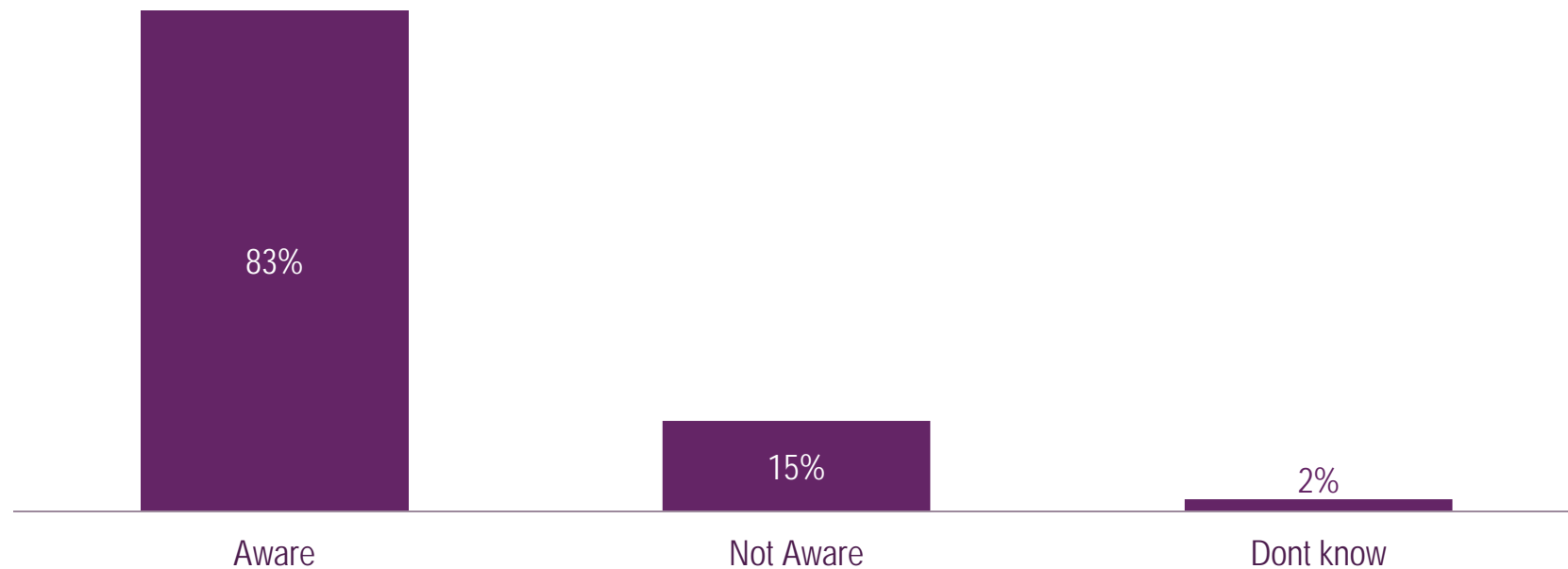
Source: Ofcom Technology Tracker 2016, *Take-up measures from H1 2016

Base: All adults (H1 2016, 3737), (H2 2016, 2893)

Q. Before today were you aware that you can listen to radio programmes as they are broadcast in these ways?

Figure 26

Awareness of digital radios sometimes called 'DAB radios'



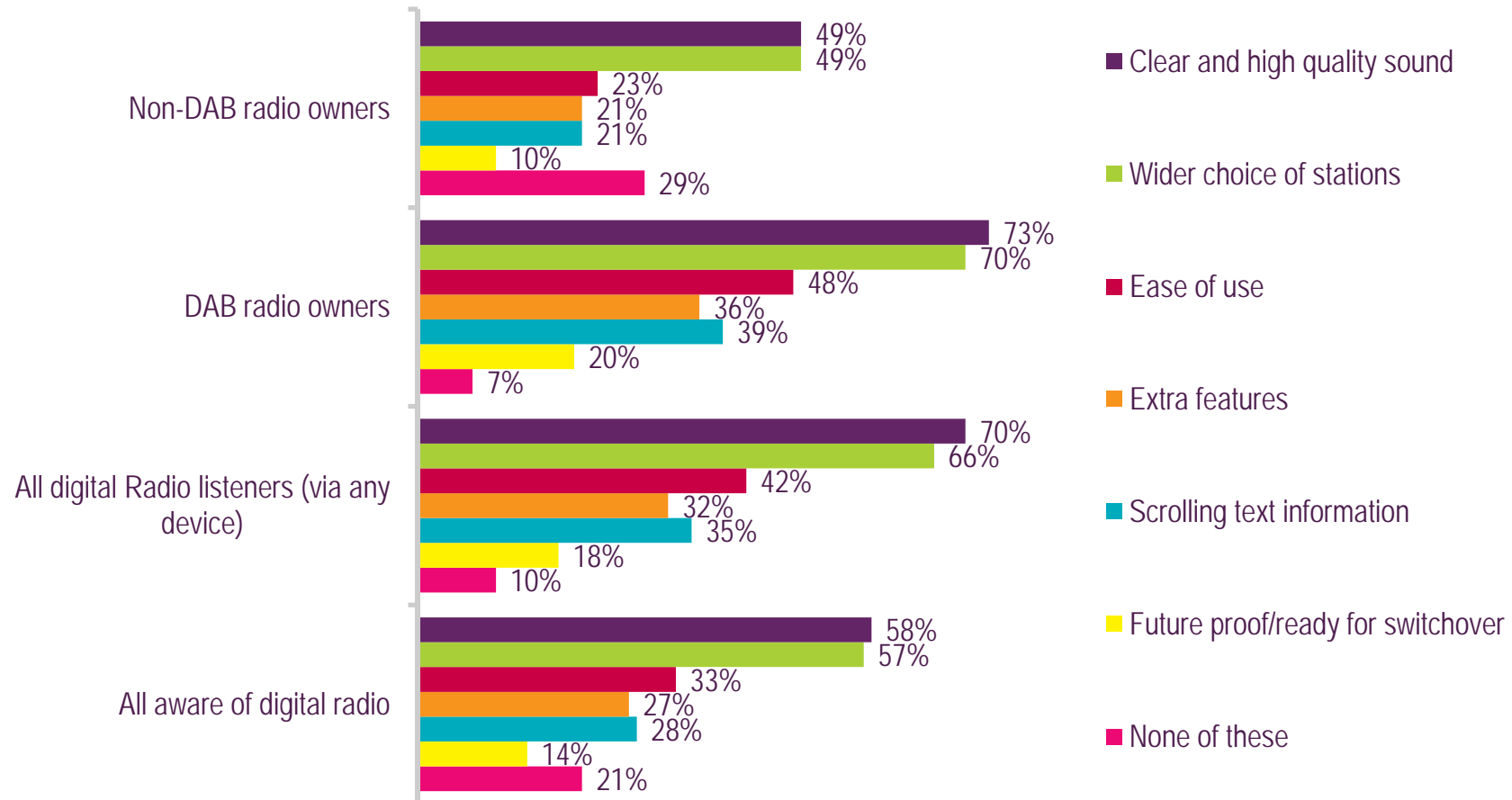
Source: Ofcom Technology Tracker 2016, data as at H2 2016

Base: All adults (H2 2016, 2893)

Question. Before today, had you heard of digital radios?

Figure 27

Associations of digital radio, among those with and without DAB



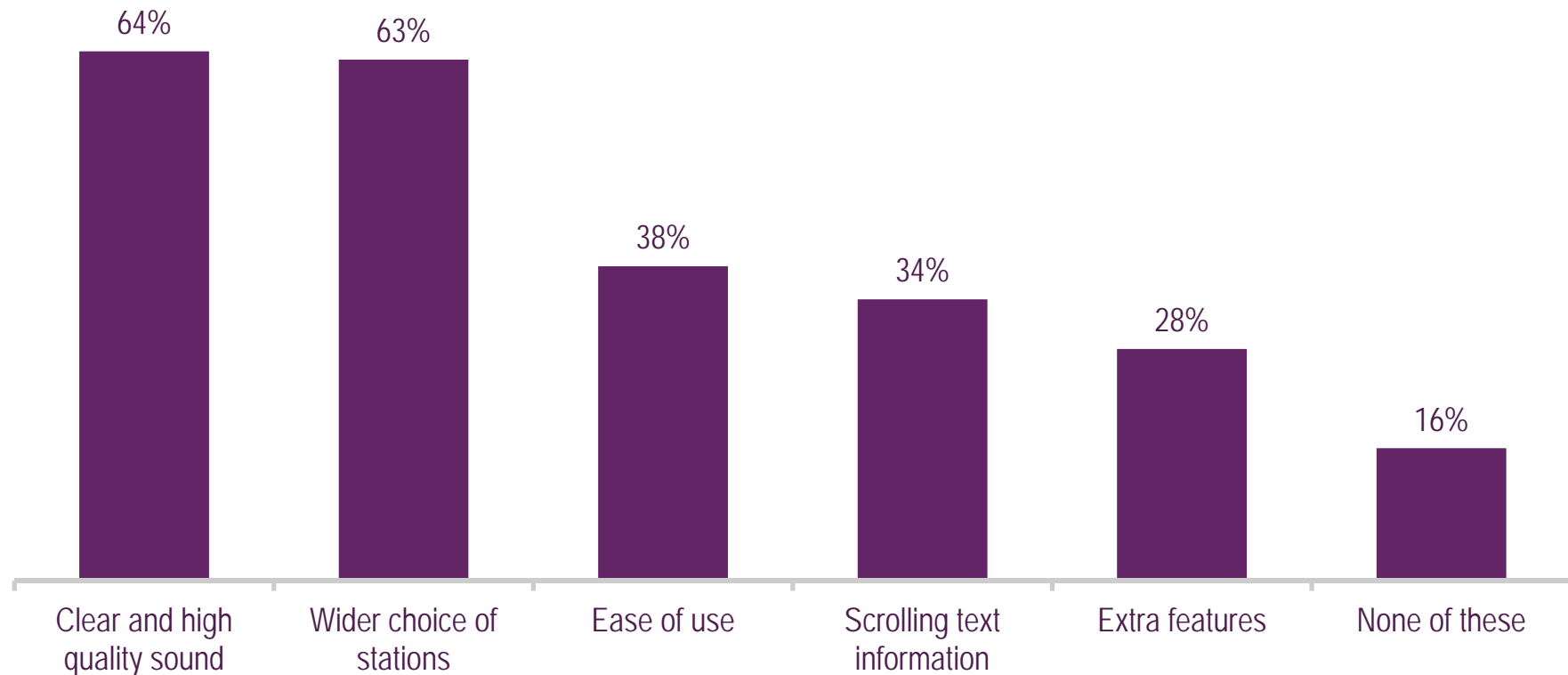
Source: Ofcom Technology Tracker, H2 2016

Base: All aware of digital radio, with experience of listening or aware of way of listening (2603); all digital radio listeners (1534); DAB radio owners (970); non-DAB radio owners (1607)

Question. Which if any of these features did you associate with digital radio?

Figure 28

Features of digital radio that listeners have experienced



Source: Ofcom Technology Tracker, H2 2016

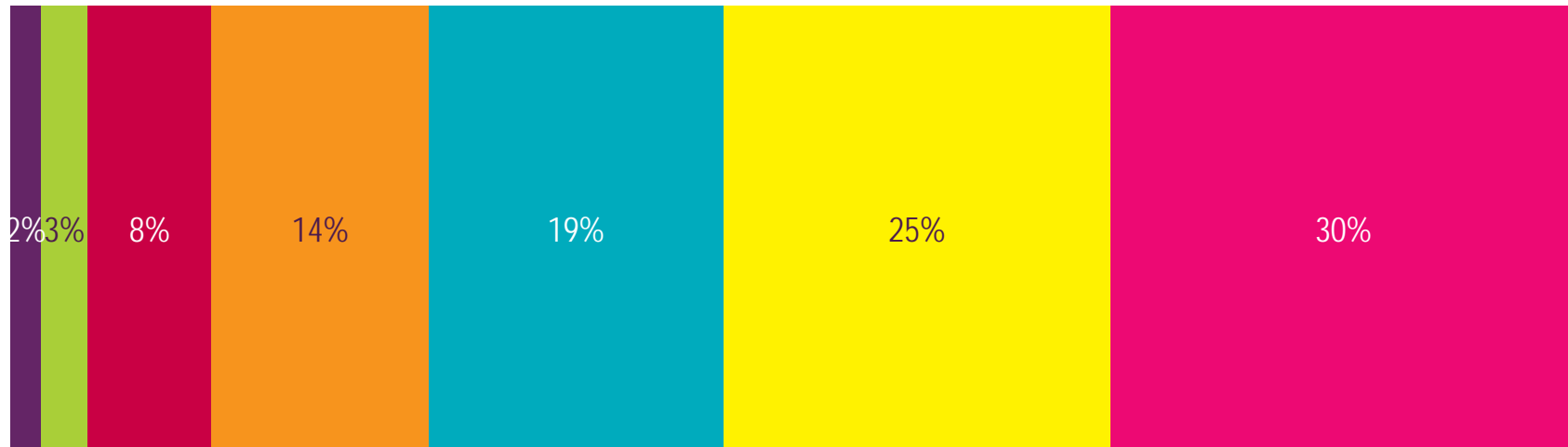
Base: All with any type of DAB digital radio (in home or vehicle) (1354)

Q. As a digital radio listener which, if any, of these features of digital radio have you experienced?

Figure 29

Likelihood of purchasing a DAB set

Certain to
 Very likely
 Likely
 Unlikely
 Very unlikely
 Certain not to
 Don't know



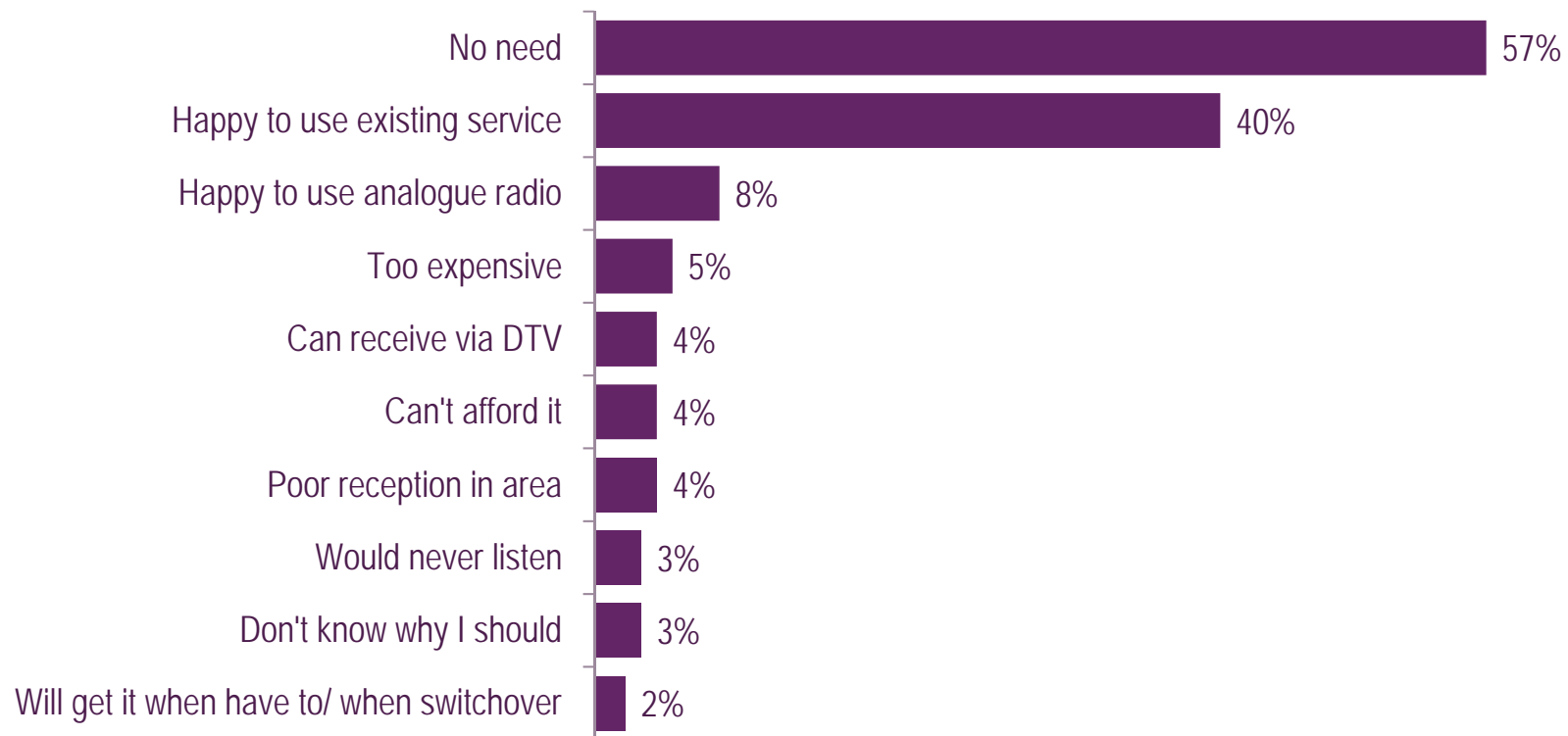
Source: Ofcom Technology Tracker, H2 2016

Base: Those who listen to the radio but have no DAB sets in the home (630)

Question: How likely is it that your household will get a DAB radio in the next 12 months?

Figure 30

Reasons radio listeners gave for not acquiring a DAB radio set



Source: Ofcom Technology Tracker, H2 2016

Base: Those unlikely to get a DAB radio in the next 12 months (384)

Question: Why are you unlikely to get a DAB radio in the next 12 months?