

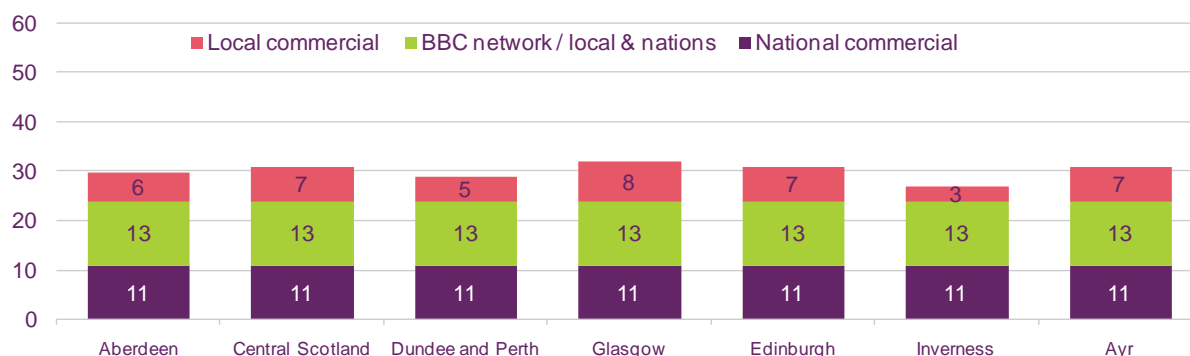
3 Radio and audio content

3.1 Radio service availability

Across Scotland, digital radio listeners in the Glasgow area have the greatest DAB choice with 32 stations, including the 22 national services, plus BBC Radio Scotland / BBC nan Gàidheal, and eight commercial stations available through local multiplexes. Listeners in Edinburgh and Central Scotland have access to a similar number of services, with 31 DAB stations available. Station choice was lowest in Inverness at 27, with three local commercial stations available on DAB.

For maps of current DAB coverage in Scotland, and information on how DAB coverage may improve in the future, see Ofcom's DAB planning consultation, published in June 2011³.

Figure 3.1 Availability of DAB stations, by area



Source: Ofcom, June 2011

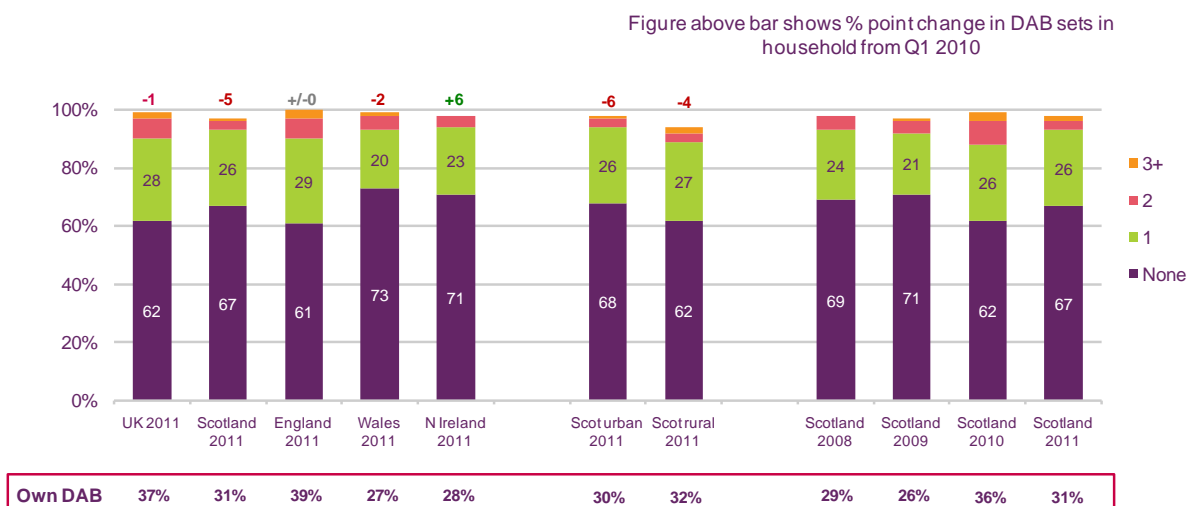
Note: This chart shows the maximum number of stations available in each area; local variations along with reception issues mean that listeners may not be able to access all of these

3.2 Digital radio set ownership

Three in ten adults in Scotland who listen to the radio report that they have a DAB radio set at home. The proportion of owners in Scotland appears to have fallen this year, although caution should be applied when using these data, since some respondents may confuse the description of a DAB radio set with an analogue set that has a digital display.

³ <http://stakeholders.ofcom.org.uk/consultations/dab-coverage-planning/>

Figure 3.2 Ownership of DAB digital radios



Source: Ofcom research, Q1 2011

Base: Adults aged 16+ who listen to radio and have any active radio sets in the household that someone listens to in most weeks (n = 2811 UK, 357 Scotland, 1629 England, 397 Wales, 428 Northern Ireland, 174 Scotland urban, 183 Scotland rural, 766 Scotland 2008, 780 Scotland 2009, 1034 Scotland 2010, 357 Scotland 2011)

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?

Among radio listeners in Scotland who do not have a DAB radio set, one in five (19%) say that it is likely that they will purchase a DAB set in the next year⁴, on a par with the UK average (21%)⁵.

3.3 Patterns of listening to audio content

Adults in Scotland listen to fewer hours of radio than those in other nations

Among adults (15+) in Scotland, average weekly radio listening in the year ending Q1 2011 stood at 21.8 hours and average weekly reach at 88.1% – both the lowest across all of the UK nations and comparing with the UK averages of 22.3 hours and 90.8% respectively.

⁴ This finding should be treated with caution, as respondents' stated purchase intentions in survey research are often unreliable.

⁵ This finding should be treated with caution, as respondents' stated purchase intentions in survey research are often overstated.

Figure 3.3 Average weekly reach and listening hours: year to Q1 2011

	England	Scotland	Wales	Northern Ireland	UK TOTAL
Average weekly listening	22.3 hours	21.8 hours	23.3 hours	22.2 hours	22.3 hours
Reach	90.9%	88.1%	92.9%	92.0%	90.8%

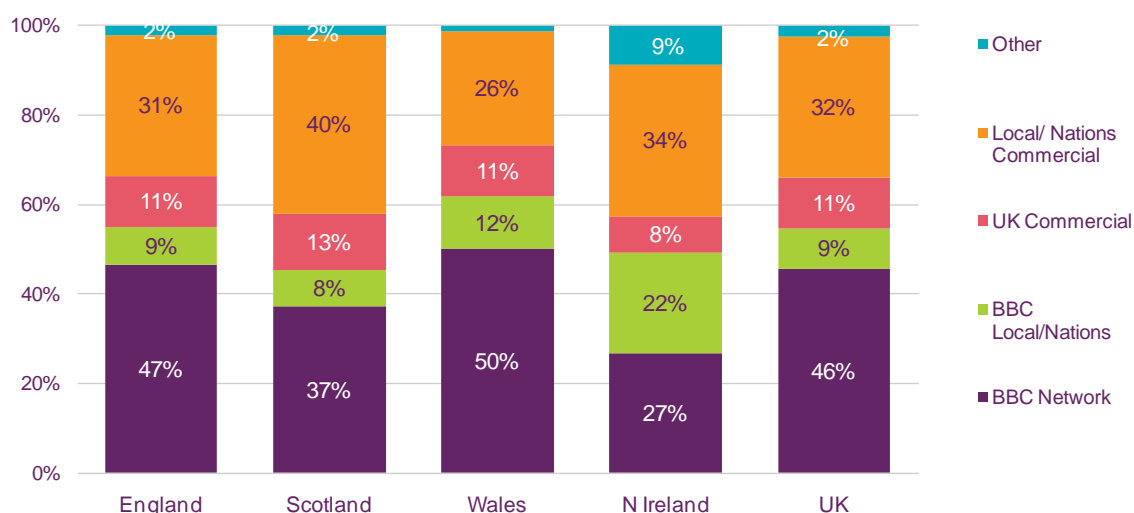
Source: RAJAR, All adults (15+), year ended Q1 2011. Reach is defined as the total proportion of the respective adult population who listened to at least five consecutive minutes in the average week.

Commercial radio stations are more popular in Scotland than in other nations

In the year ending Q1 2011, local commercial stations accounted for 40% of total radio listening hours in Scotland, a higher share for this sector than in any other UK nation (the UK average was 32%). National commercial stations attracted a 13% market share (UK average 11%) – again, the highest among the UK’s nations. Conversely, BBC stations attracted a market share of 45% in Scotland, lower than in any of the other nations (the UK average share was 55%).

Figure 3.4 Share of listening hours, by nation: year to Q1 2011

Audience share for BBC and commercial stations, local/national

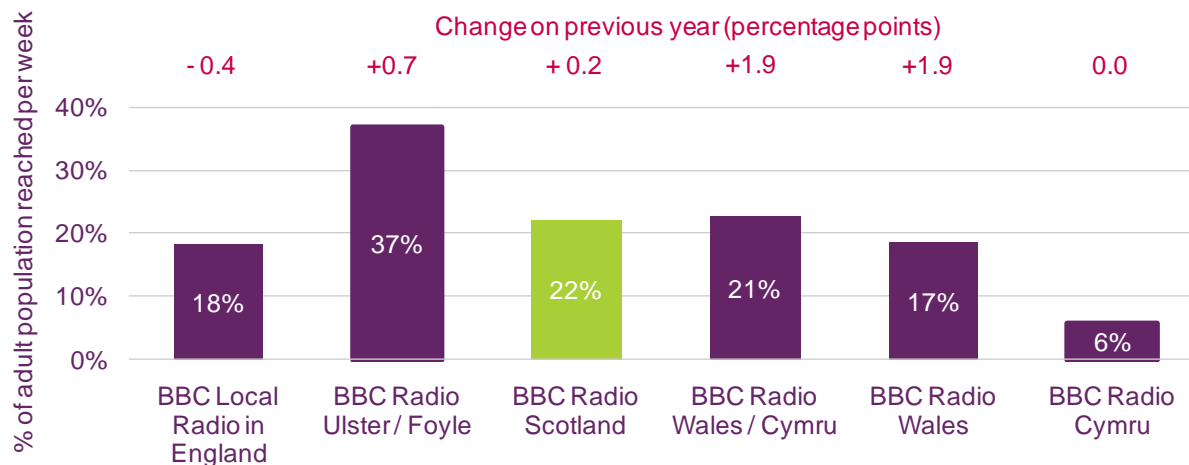


Source: RAJAR, All adults (15+), year ended Q1 2011

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

Just over one in five (22%) of adults listened to BBC Radio Scotland on an average week in Q1 2011, up 0.2 percentage points on the previous year. Total listening hours to the national BBC stations in Scotland accounted for 8% of all radio listening hours in Q1 2011.

Figure 3.5 Weekly reach for national/ local BBC services



Source: RAJAR, All adults (15+), year ended Q1 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.

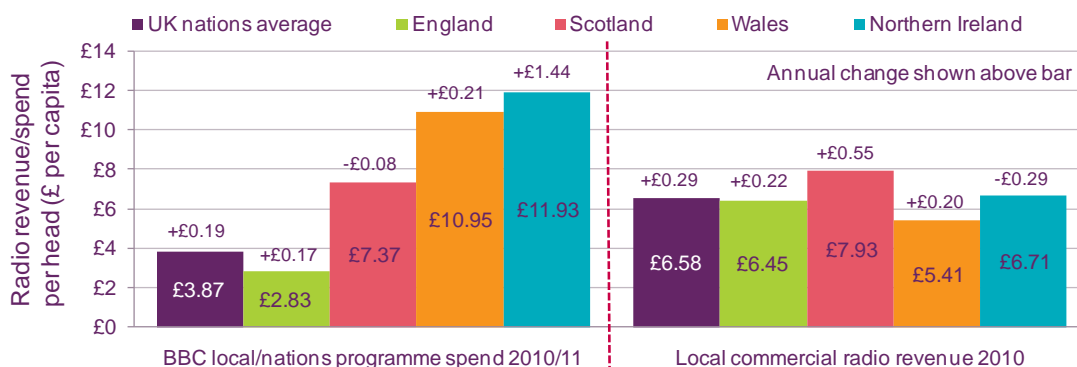
3.4 The radio industry

Commercial radio revenue and BBC Radio funding in Scotland

The commercial revenues generated by local radio stations in Scotland reached £41.4m in 2010. Adjusting for population size, Scotland has the largest revenue per head of the UK nations at £7.93, a £0.55 (7%) increase on 2009.

BBC Radio spend on BBC Radio Scotland and BBC Radio nan Gàidheal totalled £38.5m in 2010/11. Expenditure per head declined 1% on the previous year, now standing at £7.37. Scotland was the only UK nation to see BBC radio expenditure per head decline (albeit marginally) in 2010/11.

Figure 3.6 Local/nations radio spend and revenue, per head of population 2010/11



Source: Broadcasters, 2010

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. These figures supersede all others and are not directly comparable with historical data.

3.5 Scottish community broadcasting

Twenty community radio licences have been awarded in Scotland, with two of those handed back, leaving 18 still active. Over the past year Ofcom has awarded three stations in Scotland with extensions to their licences - Awaz, Revival and Black Diamond.

The Scottish Community Broadcasting Network works to provide support, advice and guidance to communities which are interested in community radio. Scotland's network of community radio stations joined forces to broadcast an exclusive interview programme featuring the leaders of the four main parties standing in the 2011 Scottish Parliamentary Election. This was the first time the stations had linked up to cover a Scottish election.