

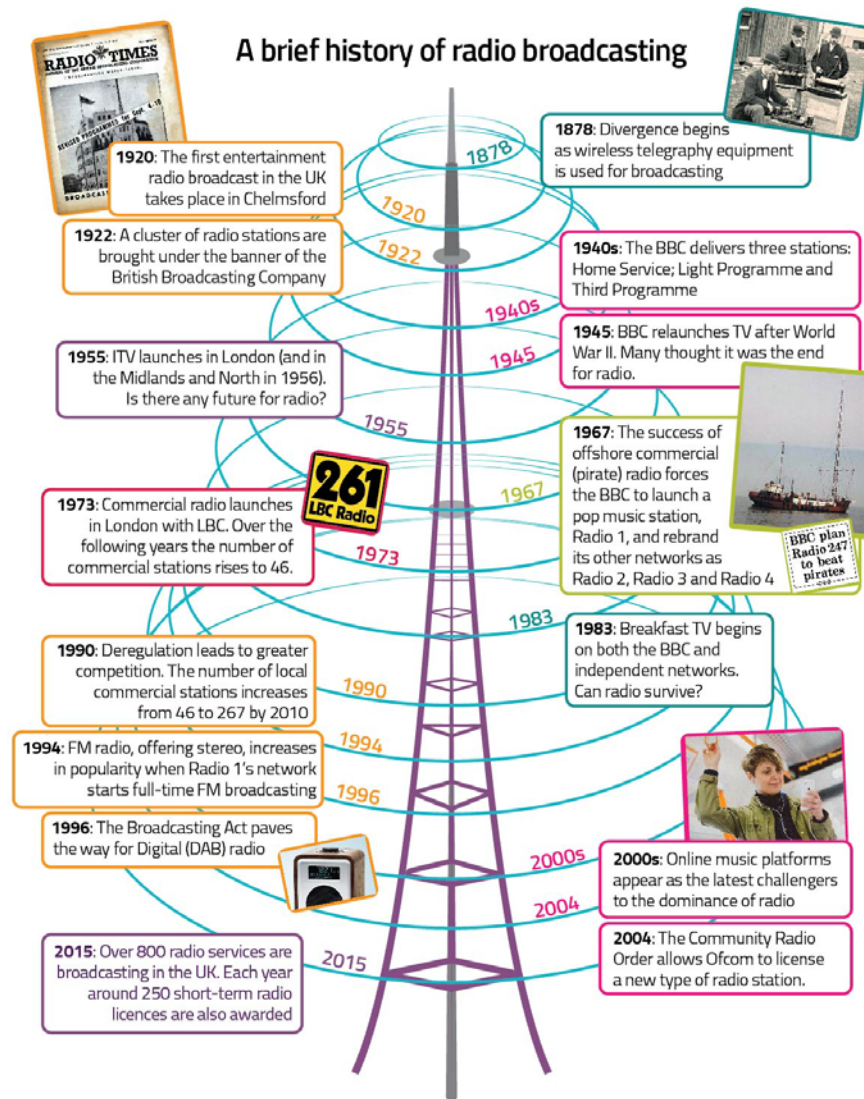
## Figure 3.1

### UK radio industry key metrics

UK radio industry	2010	2011	2012	2013	2014	2015
Weekly reach of radio (% of population)	90.6%	90.8%	89.5%	90.4%	89.5%	89.6%
Average weekly hours per listener	20.1	20.5	22.2	21.5	21.4	21.4
BBC share of listening	55.2%	54.7%	54.7%	54.6%	53.8%	53.6%
Total industry revenue*	£1,137m	£1,164m	£1,203m	£1,177m	£1,248m	£1,248m
Commercial revenue*	£452m	£457m	£475m	£461m	£512m	£519m
BBC expenditure	£675m	£697m	£717m	£705m	£725m	£717m
Community radio revenue	£10.0m	£10.5m	£10.8m	£10.9m	£11.5m	£11.6m
Radio share of advertising spend	3.3%	3.3%	3.3%	3.1%	3.2%	3.0%
DAB digital radio take-up (households)	38.2%	42.6%	44.3%	47.9%	49.0%	55.7%
Digital radio listening share	24.6%	27.8%	31.2%	35.6%	37.3%	40.7%

Source: RAJAR (all adults age 15+), Ofcom calculations based on figures in BBC Annual Report and Accounts 2015-16 ([www.bbc.co.uk/annualreport](http://www.bbc.co.uk/annualreport)), AA/Warc, broadcasters. Revenue figures are nominal. DAB take up - Q1 of the following year. \*Commercial and total revenue figures for 2010-2013 are not wholly comparable to 2014 and 2015 due to an amendment to the data collection methodology. Digital listening share 12 months to December.

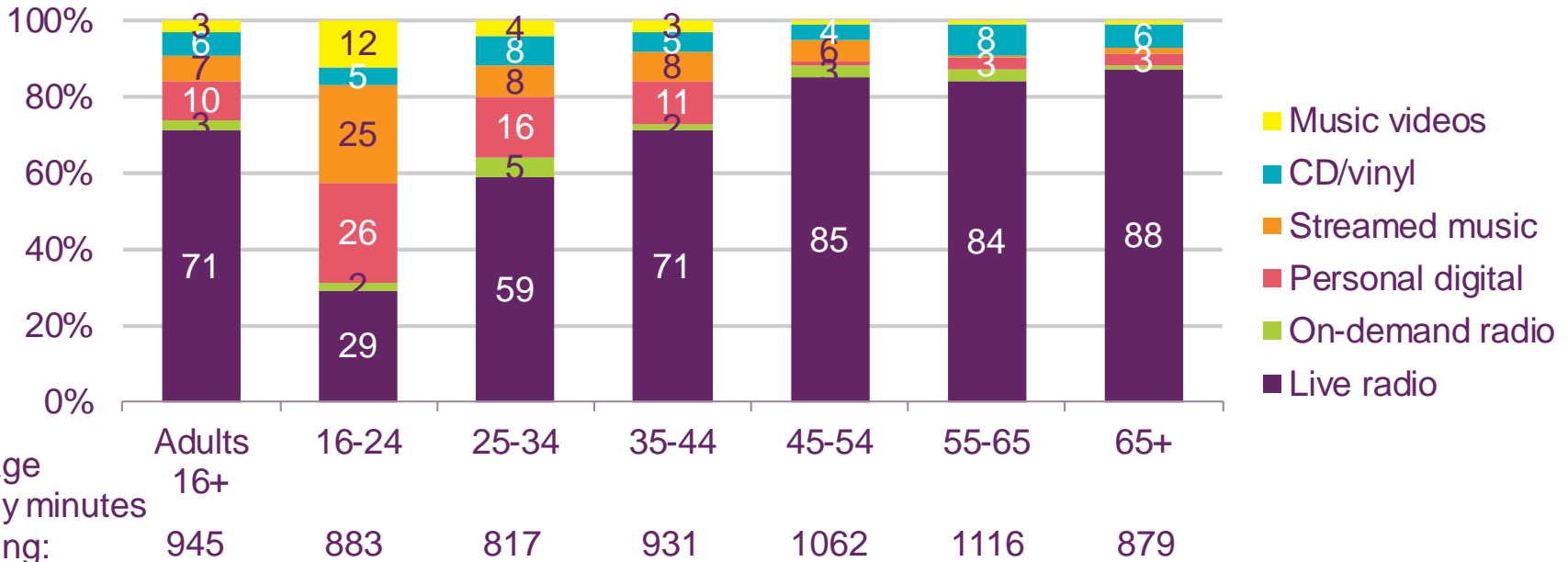
# Figure 3.2



# Figure 3.3

## Proportion of time spent listening, by age group

Proportion of listening time (%)

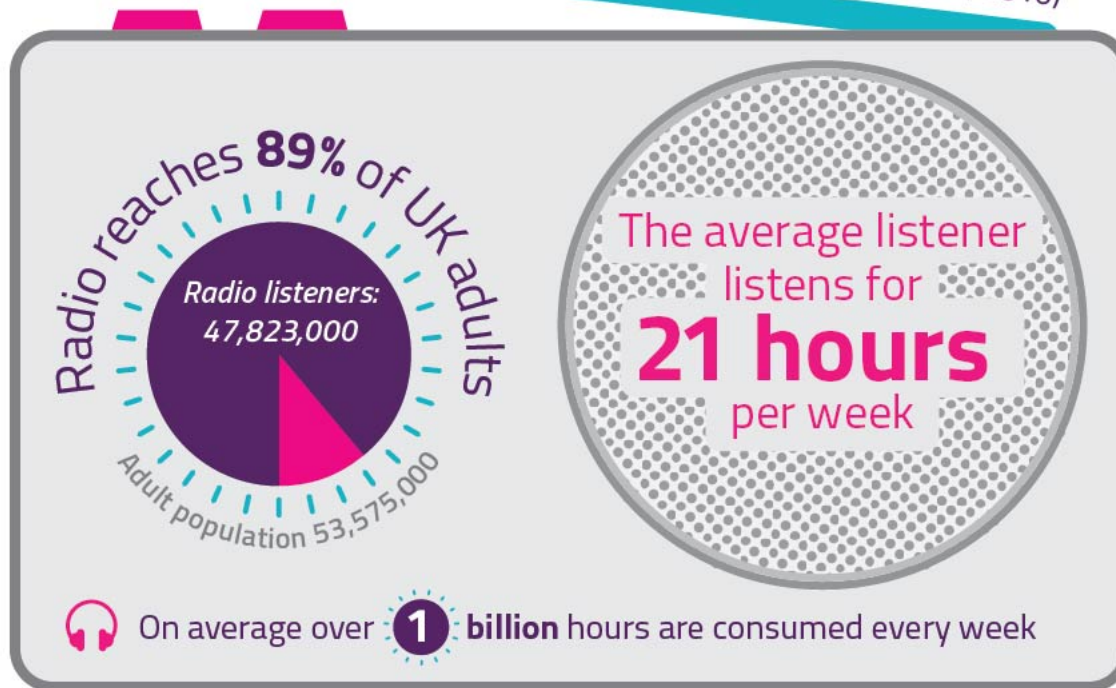


Source: Ofcom Digital Day 2016, Data book 1: C2. Adult diary: Chart shows the proportion of all listening time (B2) attributed to each activity (D) by age group. The average weekly minutes figure is among those who did any listening activity across their diary week and also includes simultaneous activity. Base: Adults aged 16+ (1512) 16-24s (129) 25-34s (189) 34-44s (282) 45-54s (299) 55-64s (259) 65+s (354).

Figure 3.4

## An overview of radio listening

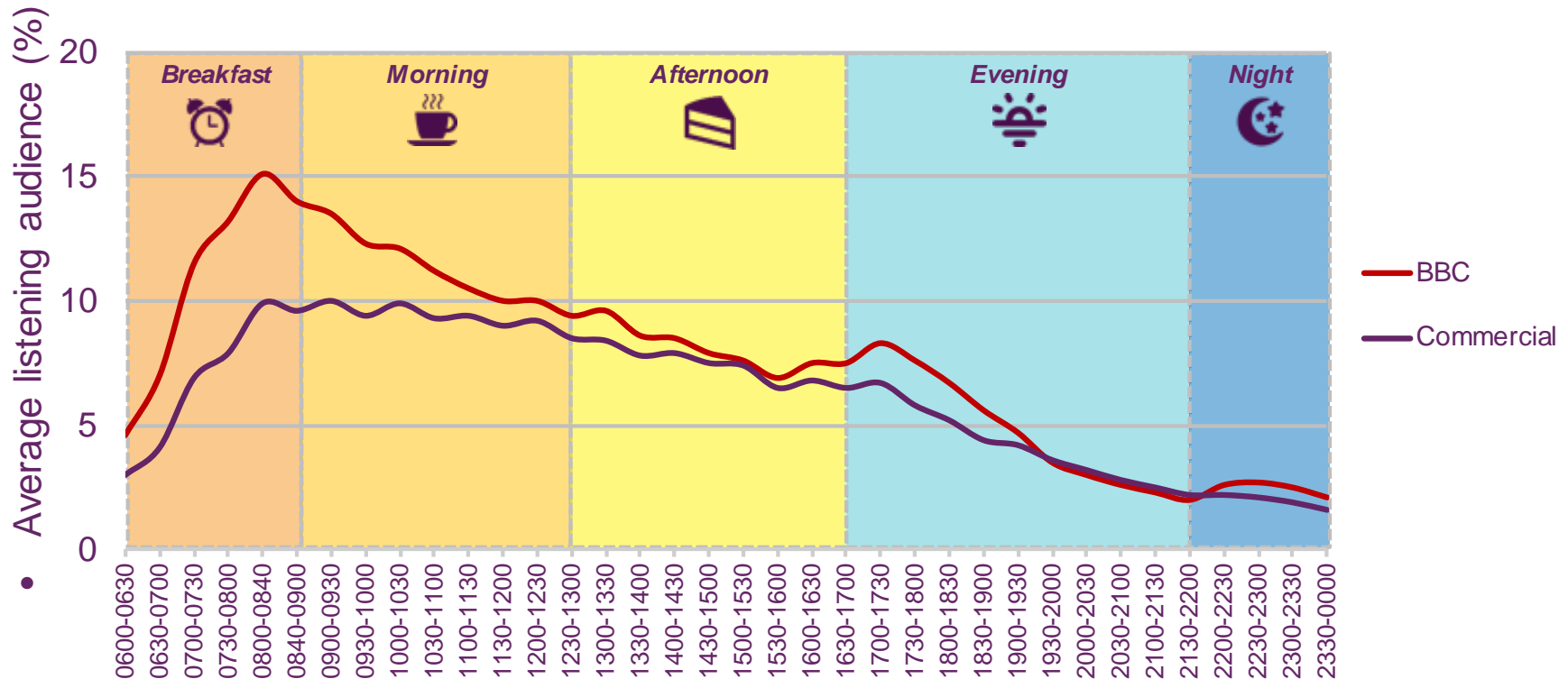
Audience reach has changed little over time: 90.8% (2011) to 89.3% (Q1, 2016)



Source: RAJAR

# Figure 3.5

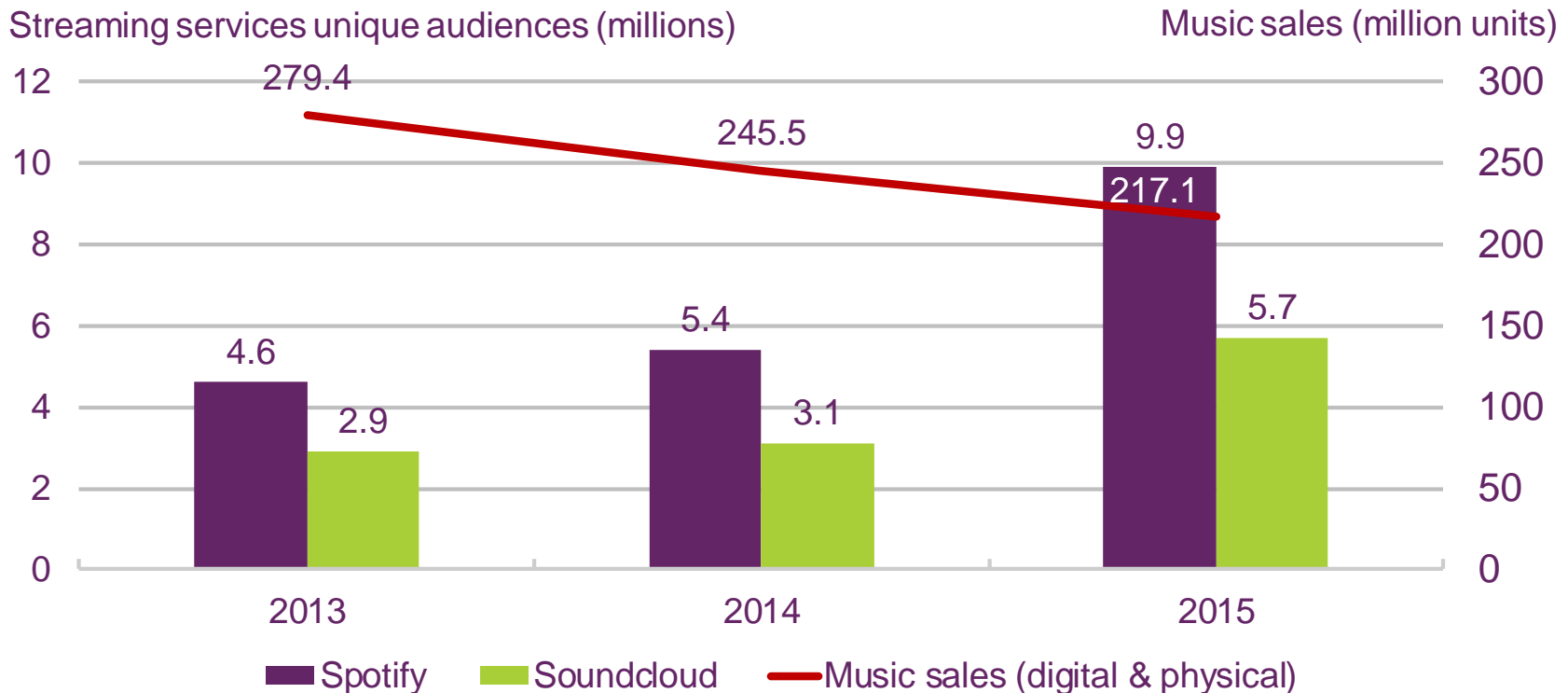
## Radio - average listening audience – 2016 BBC vs. Commercial



Source: RAJAR, all adults (15+), 12 months to Q1 2016, Monday-Sunday, average audience.  
 Base: National Total Survey Area.

## Figure 3.6

### The shift of audio consumption from albums and singles streaming

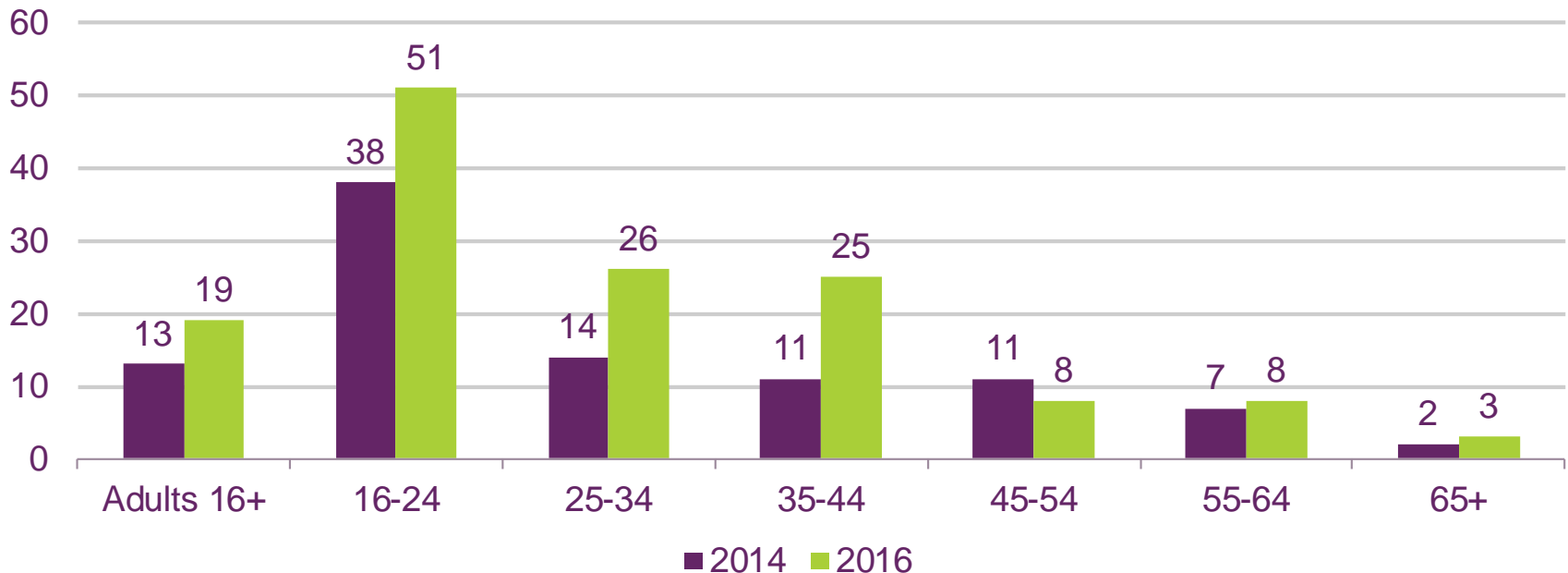


Source: Entertainment Retailers' Association / Official Charts 2016; comScore MMX Multiplatform UK, total digital population 15+, May 2016.

Note: Spotify and Soundcloud only. The unique audiences from these two sites account for the largest take-up of the streamed music unique audience. 2013 data are based on May to December 2013, averaged.

## Figure 3.7

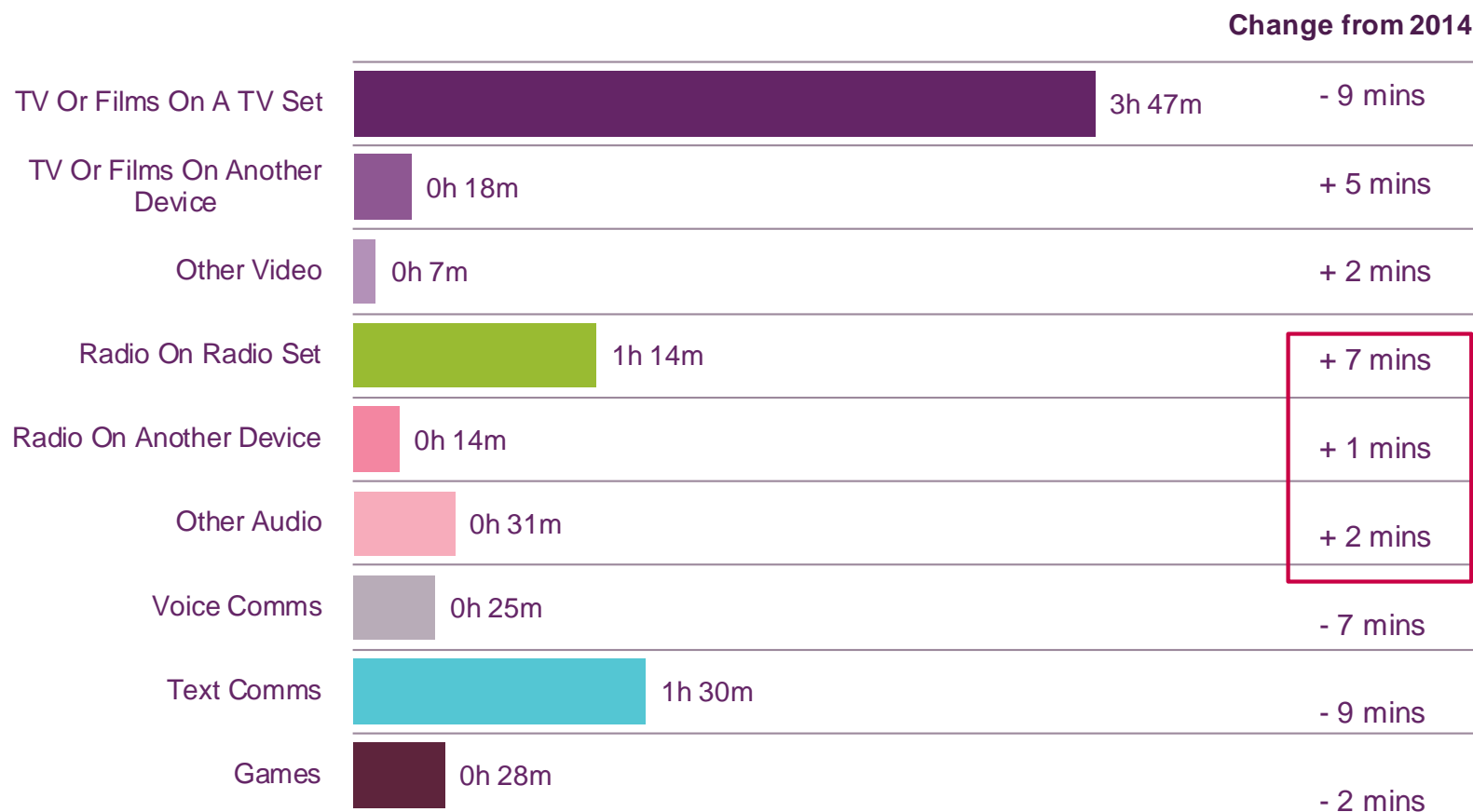
### Weekly reach of streamed music, by age group: 2016 vs. 2014



Source: Ofcom Digital Day 2016, Data book 1: A1. Adult diary: Chart shows the proportion of adults who recorded activity (D) at any point across their diary week. Base: 2016: Adults aged 16+ (1512), 16-24 (129), 25-34 (189), 35-44 (282), 45-54 (299), 55-64 (259), 65+ (354); 2014: Adults aged 16+ (1644), 16-24 (101), 25-34 (225), 35-44 (348), 45-54 (400), 55-64 (311), 65+ (259)

# Figure 3.8

## Average time spent on grouped activities per day

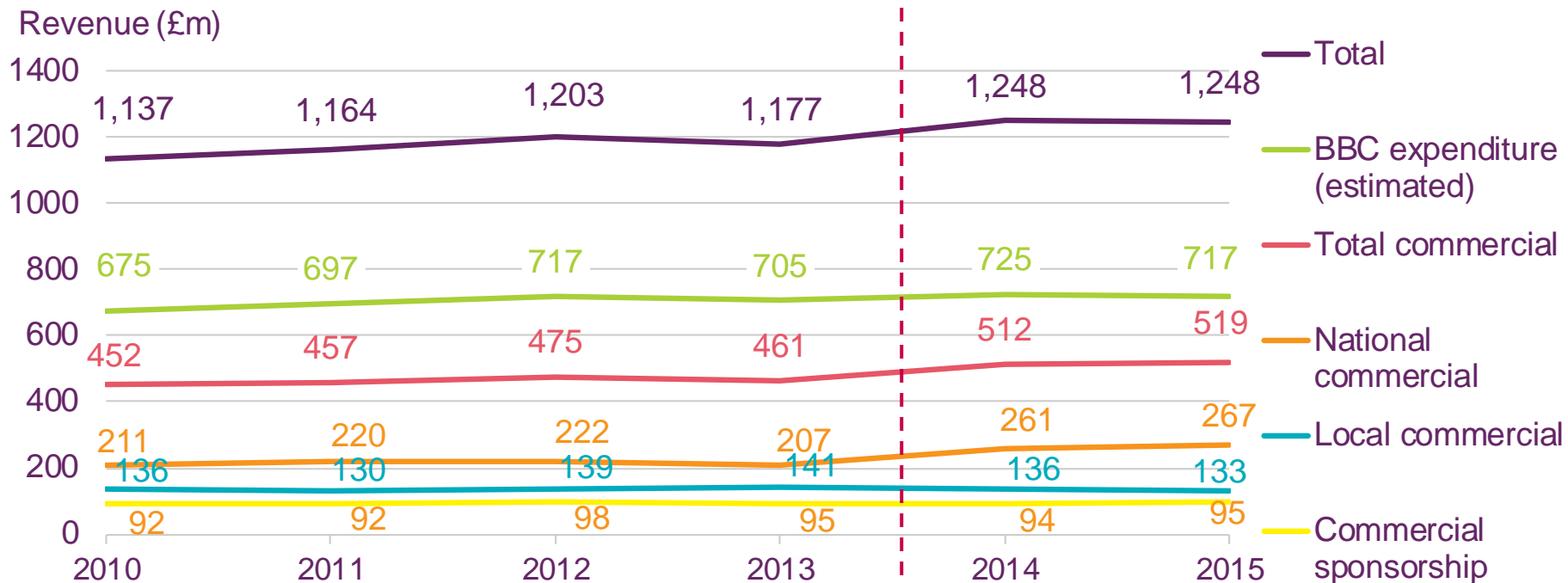


Source: Ofcom Digital Day 2016, Data book 1: B4(2)

Adult diary: Data is taken from a combination of activities (D) and devices (E) recorded. The calculations are made by netting all grouped activities together and averaging the time spent. Zeros are included so as to reflect the whole UK population..

# Figure 3.9

## Radio industry revenue 2010-2015

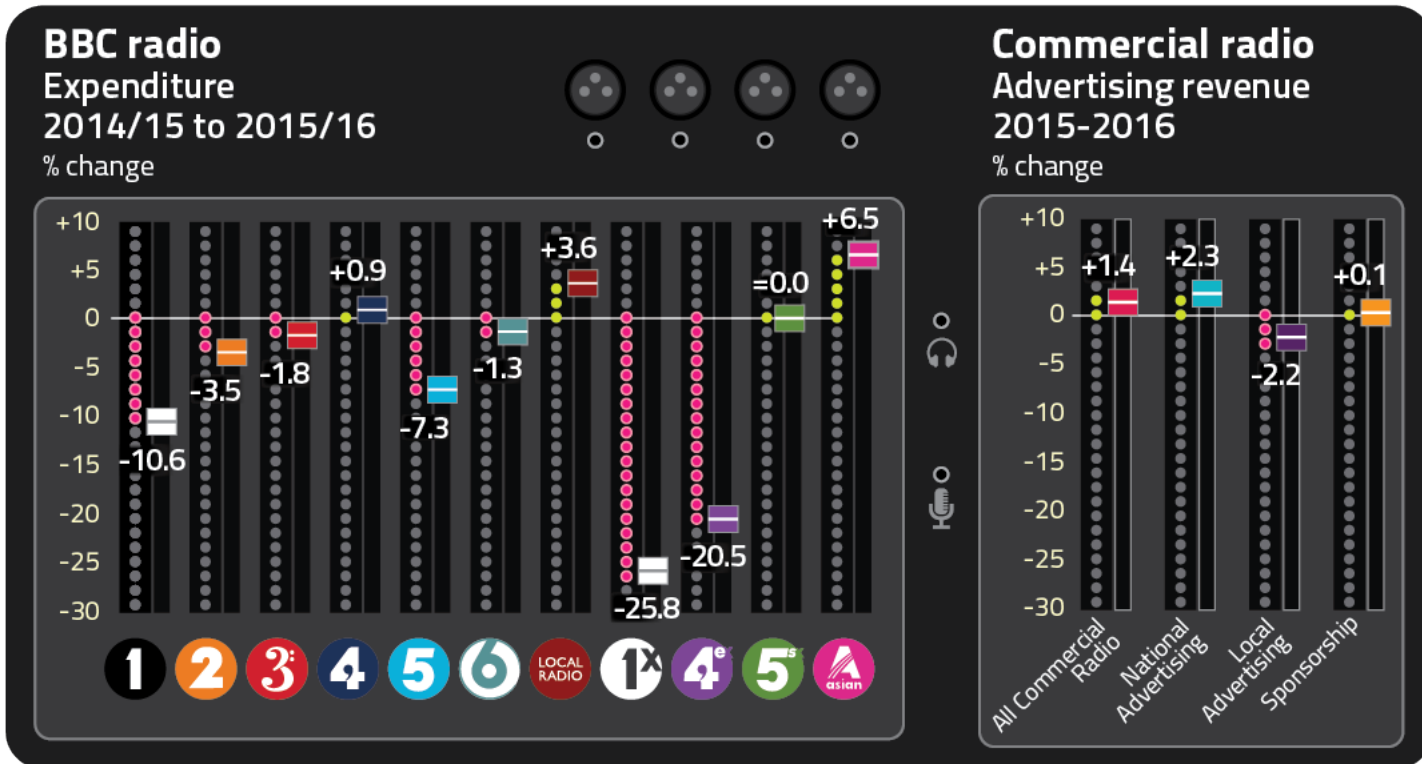


Source: Ofcom / operator data / BBC Annual Report 2009-2016

Note: BBC expenditure figures are estimated by Ofcom based on figures from the BBC Annual Report ([www.bbc.co.uk/annualreport](http://www.bbc.co.uk/annualreport)); figures in the chart are rounded and are nominal. Total includes community radio, but community radio is not shown on the chart. Total commercial includes all sources of revenue - national, local, sponsorship and 'other', but 'other' is not shown on the chart. Commercial and total revenue figures for 2010-2013 are not wholly comparable to 2014 and 2015 due to an amendment to the data collection methodology.

# Figure 3.10

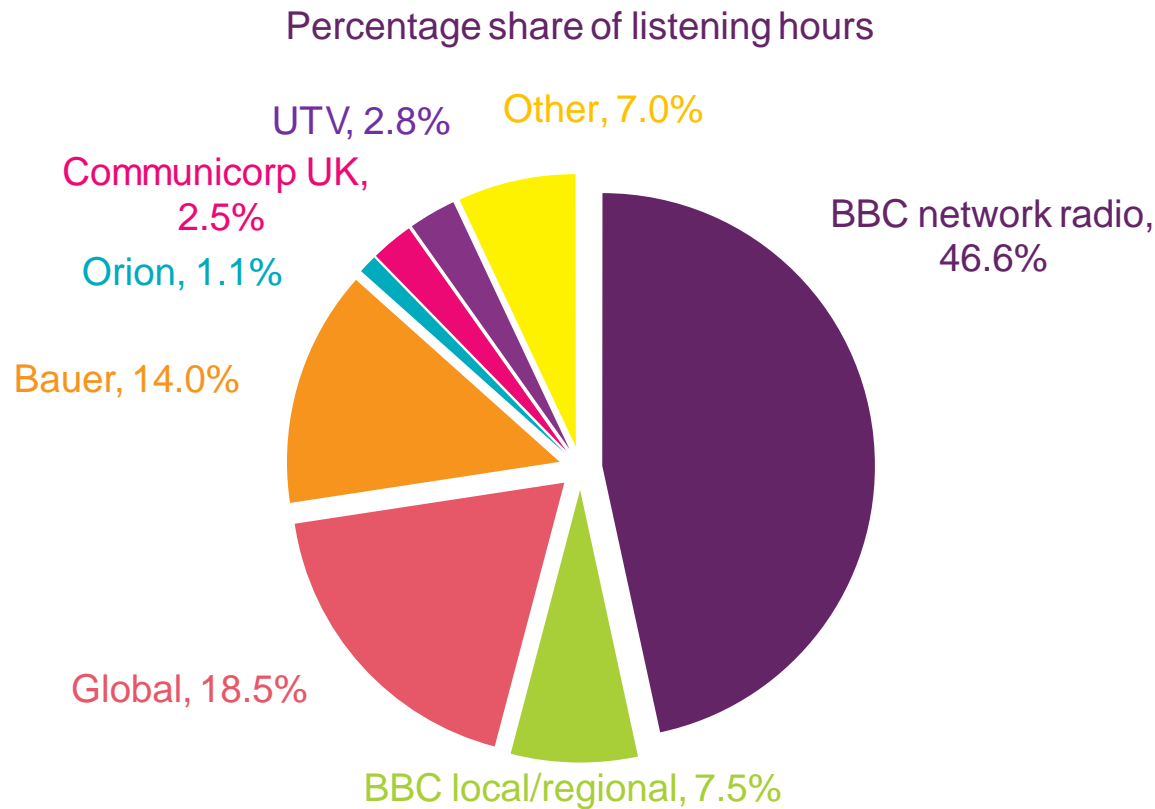
Radio expenditure and revenue percentage change, year on year



Source: Ofcom / operator data

# Figure 3.11

## Share of all radio listening hours: Q1 2016

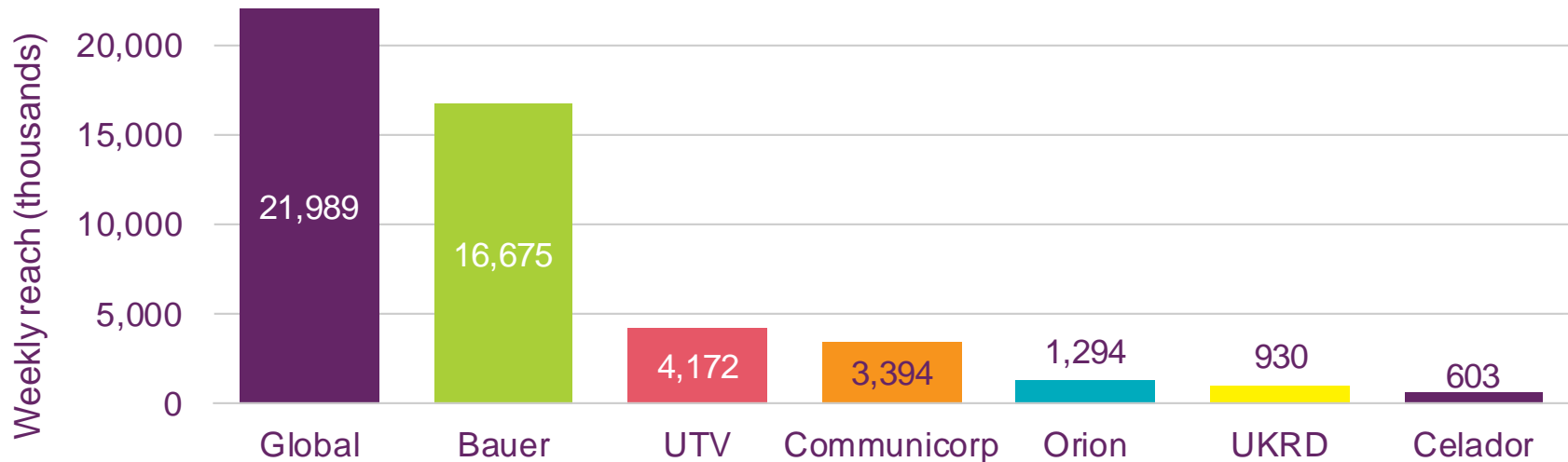


Source: RAJAR, all adults (15+), Q1 2016. Base: National Total Survey Area. Note: UTV Radio commenced trading as Wireless Group in March 2016 and Orion Media Group was acquired by Bauer in May 2016.

# Figure 3.12

## Commercial radio by weekly audience reach: Q1 2016

Weekly UK audience reach	<b>41.0%</b>	<b>31.1%</b>	<b>7.8%</b>	<b>6.3%</b>	<b>2.4%</b>	<b>1.7%</b>	<b>1.1%</b>
Annual change in reach*	+1.9pp	+1.0pp	-0.6pp	+0.3pp	+0.2pp	+0.1	-0.2pp



Source: RAJAR, all adults (15+), Q1 2016. Base: National Total Survey Area \* Q1 '15 and Q1 '16

Note: UTV Radio commenced trading as Wireless Group in March 2016 and Orion Media Group was acquired by Bauer in May 2016.

## Figure 3.13

### Digital Audio Broadcasting UK radio services broadcasting May 2016

	UK Commercial 90% coverage	UK Commercial 75% coverage	BBC UK-wide	Local Commercial	Total
Multiplexes	1	1	1	54	57
Services	12	18	11	396*	437*

\* Includes simulcast services (205 unique services). Excludes BBC local radio services

Source: Ofcom, May 2016

## Figure 3.14

### Analogue UK radio stations broadcasting May 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*	35	43	43
Community radio	6	233	239
<b>TOTAL</b>	<b>95</b>	<b>516</b>	<b>576</b>

Source: Ofcom, May 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. \* Includes simulcasts.

## Figure 3.15

### Average income for community radio stations: 2010 to 2015

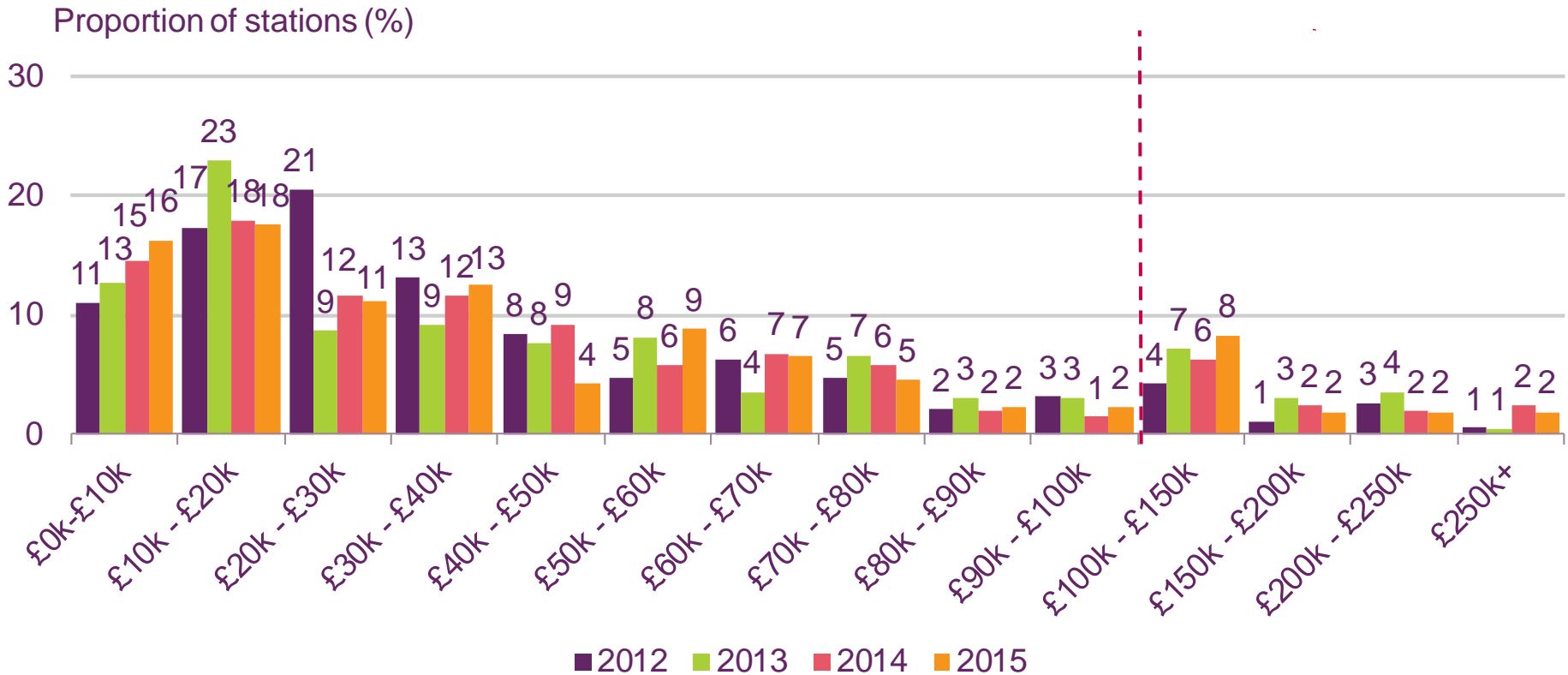
Income	2010	2011	2012	2013	2014	2015
Average (mean) income	£65,750 (-12.9%)	£60,250 (-8.3%)	£57,000 (-5.4%)	£55,500 (-2.7%)	£55,750 +0.8%	£53,500 (-4.2%)
Median income	£42,500 (-7.14%)	£40,500 (-4.8%)	£35,250 (-13.1%)	£33,250 (-5.6%)	£35,750 +6.9%	£32,500 (-8.5%)

Source: Ofcom analysis of community broadcasters' returns

Note: The data collection period changed from the financial year to the calendar year as of 2011. Data from previous years has been adjusted to reflect this.

# Figure 3.16

## Distribution of total income levels across the community radio sector



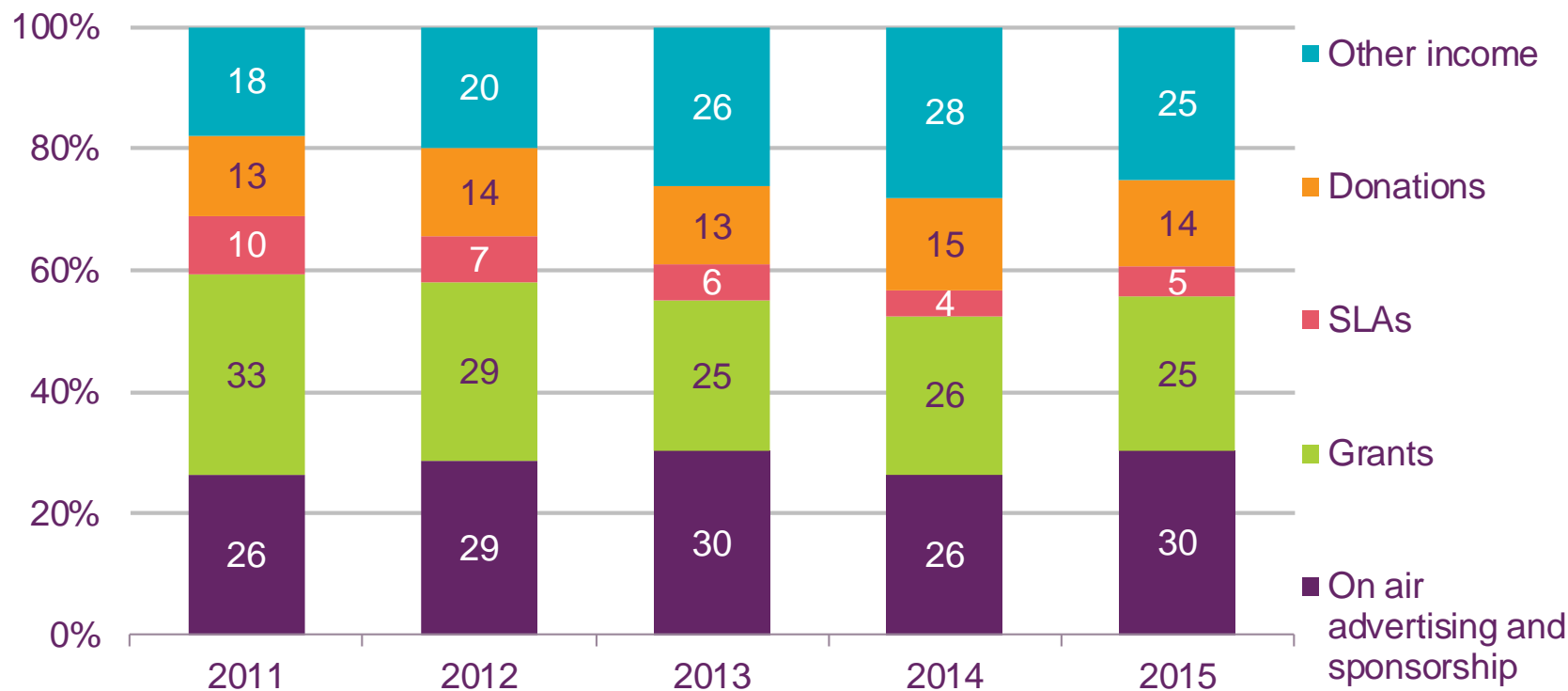
Source: Ofcom analysis of community broadcasters' returns. Figures rounded.

# Figure 3.17



## Community radio income, by source

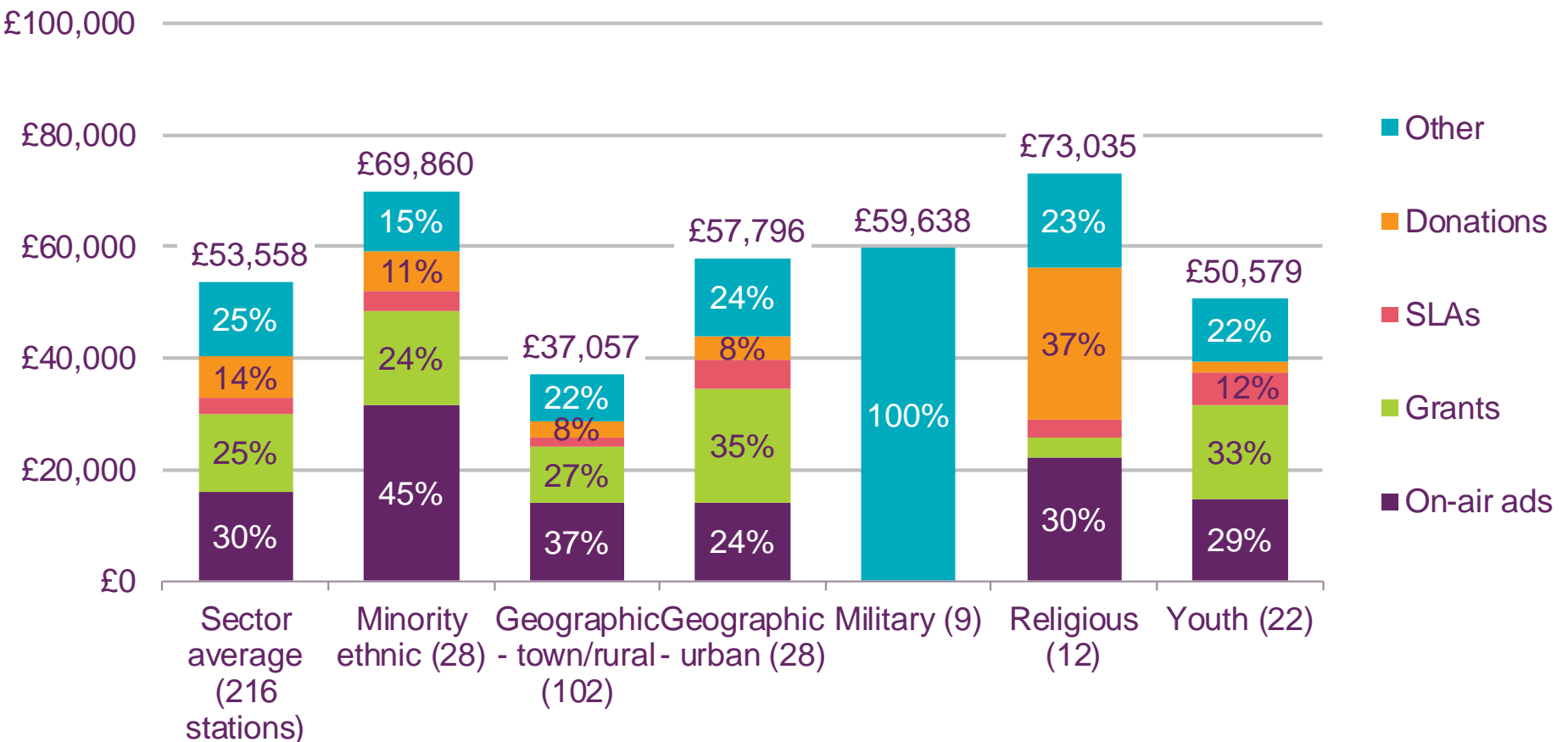
Income by source (%)



Source: Ofcom analysis of community broadcasters' returns

# Figure: 3.18

## Average income by type of community served



Source: Ofcom analysis of community broadcasters' returns

## Figure 3.19

### Average expenditure for community radio stations: 2010 to 2015

Expenditure	2010	2011	2012	2013	2014	2015
Average (mean) expenditure	£67,000 (-12.3%)	£64,250 (-4.1%)	£58,000 (-9.7%)	£55,000 (-5.0%)	£53,500 (-2.7%)	£54,800 2.3%
Median expenditure	£43,000 (-17.5%)	£41,000 (-4.9%)	£35,500 (-15.4%)	£35,750 2.7%	£33,250 (-6.8%)	£33,250 0%

Source: Ofcom analysis of community broadcasters' returns

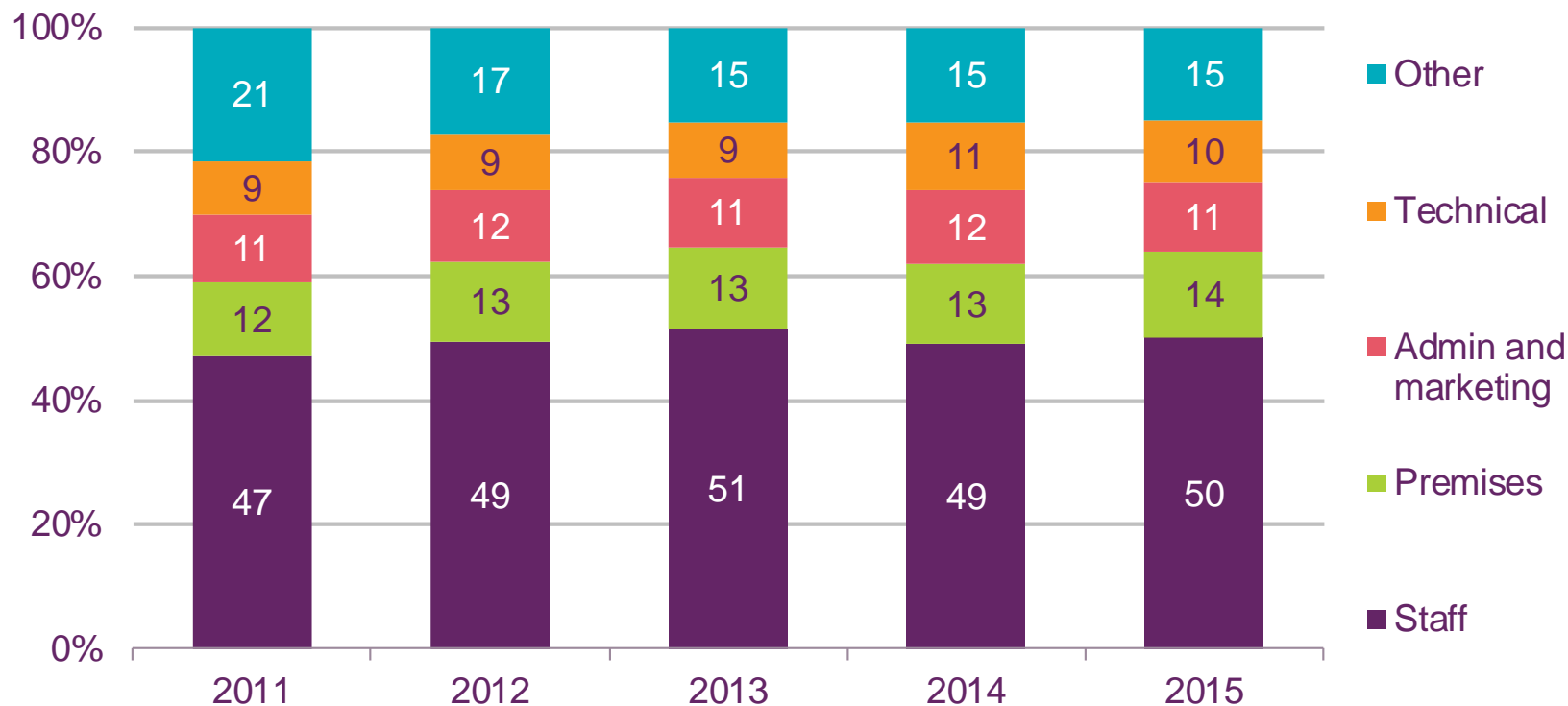
Note: The data collection period changed from the financial year to the calendar year as of 2011. Data from previous years has been adjusted to reflect this.

# Figure 3.20



## Community radio expenditure, by type

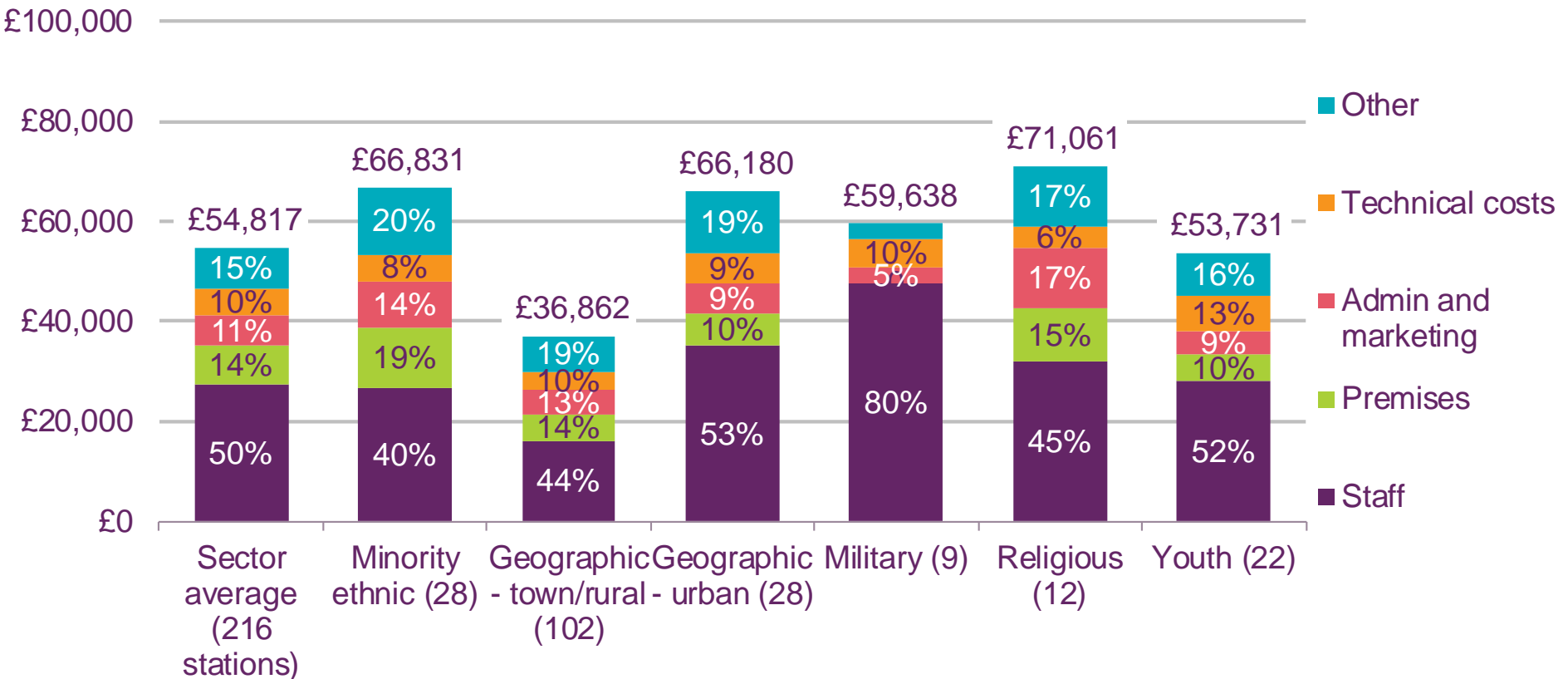
Expenditure by source (%)



Source: Ofcom analysis of community broadcasters' returns

# Figure: 3.21

## Average expenditure by type of community served



Source: Ofcom analysis of community broadcasters' returns

## Figure 3.22

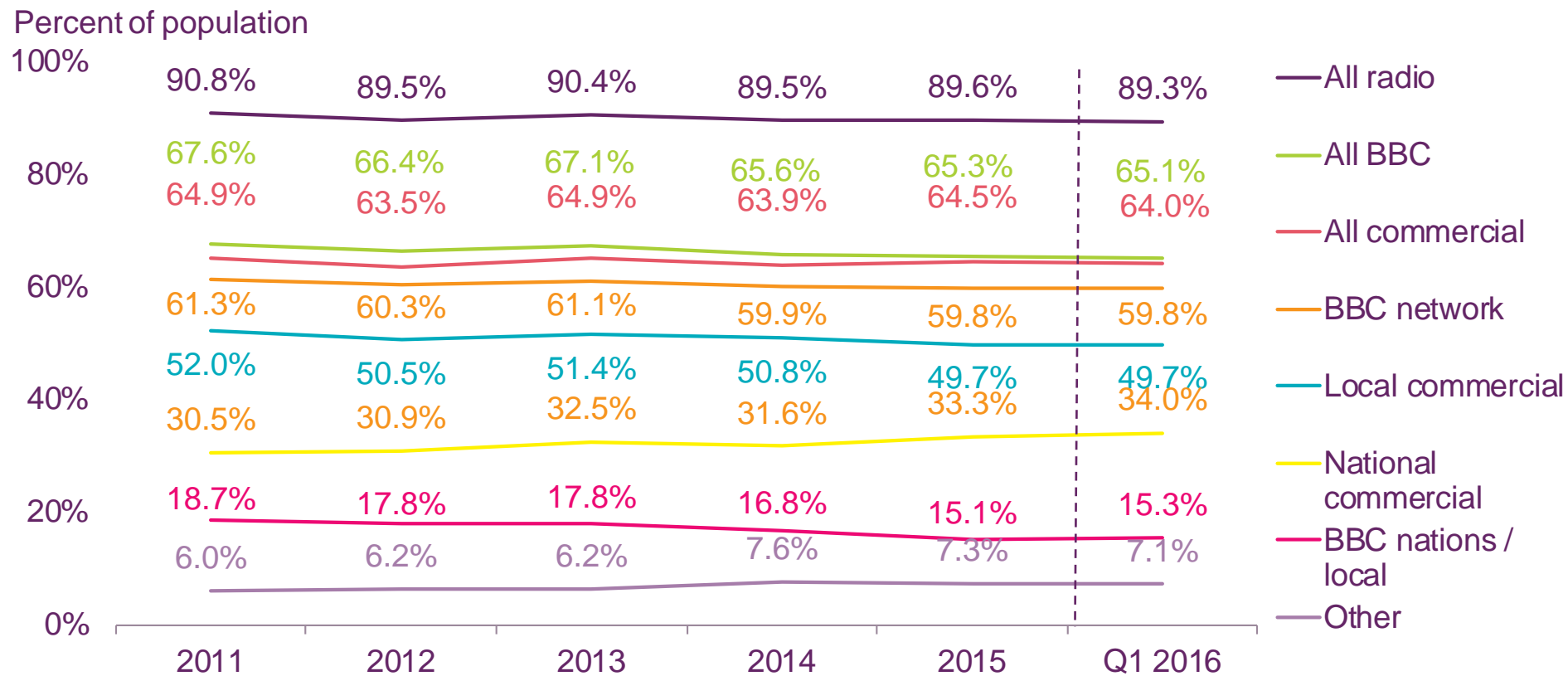
### Community radio hours and volunteers

	Sector average
Total original hours per week	90
Number of volunteers	79
Total volunteer hours per week	186
Number of volunteers trained	51

Source: Ofcom analysis of community broadcasters' returns

# Figure 3.23

## Reach of radio, by sector

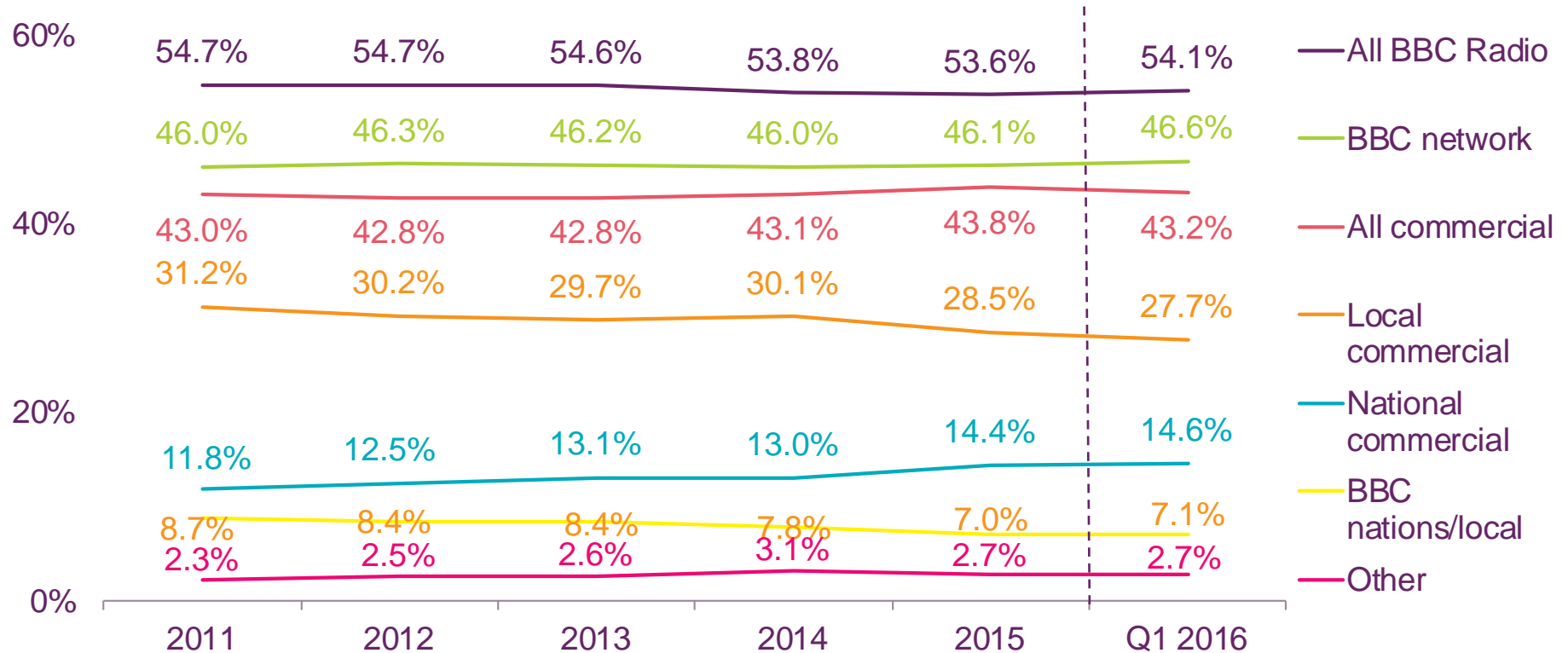


Source: RAJAR, All adults (15+), calendar years 2011-2015, Q1 2016

# Figure 3.24

## Share of listening hours, by sector

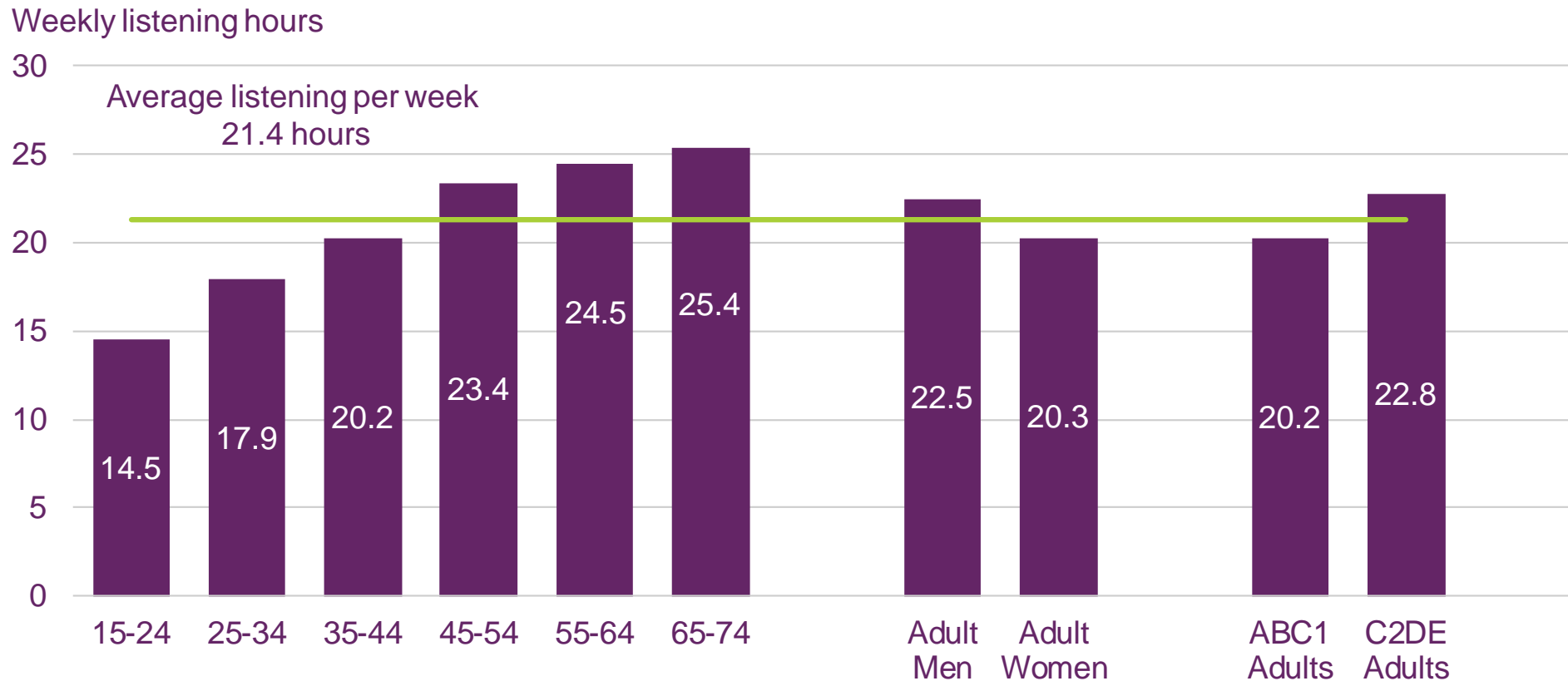
Percent of listening hours



Source: RAJAR, All adults (15+), calendar years 2011-2015, Q1 2016

## Figure 3.25

### Average weekly listening by demographic, year ending Q1 2016

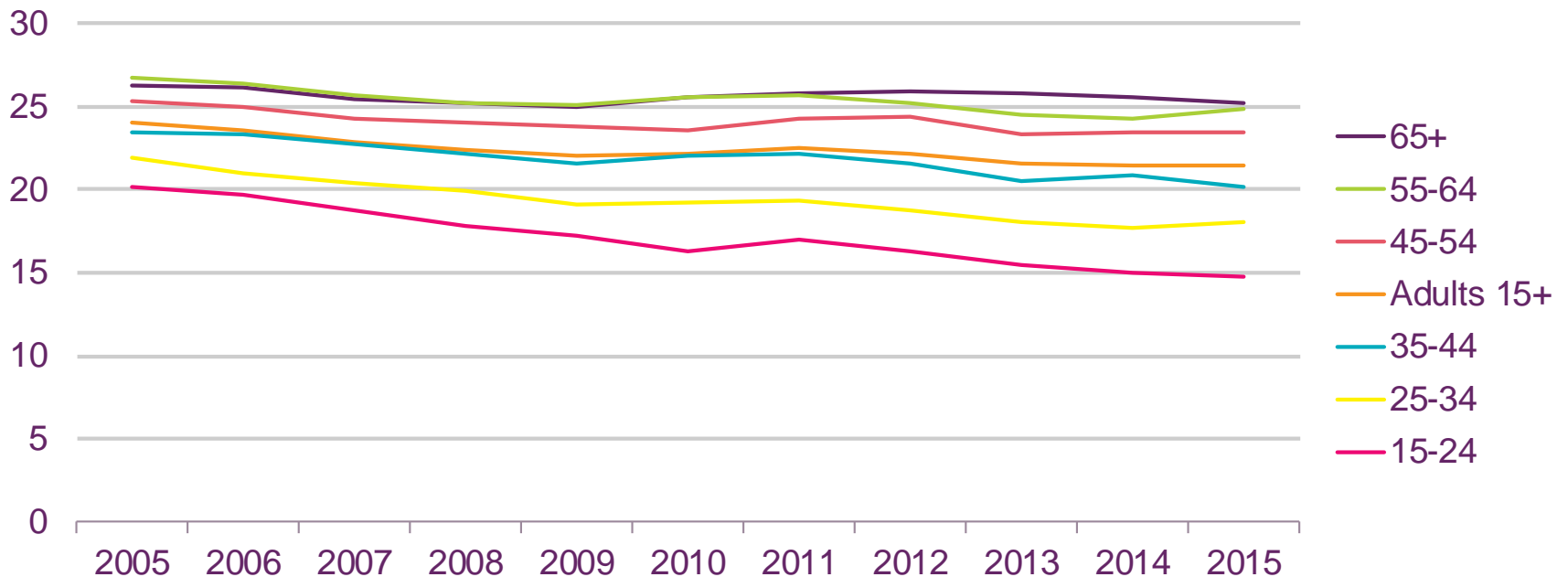


Source: RAJAR, all adults (15+), year ending Q1 2016, average weekly listening hours per listener

## Figure 3.26

### Average weekly listening, by age: 2005-2015

Average listening hours per week

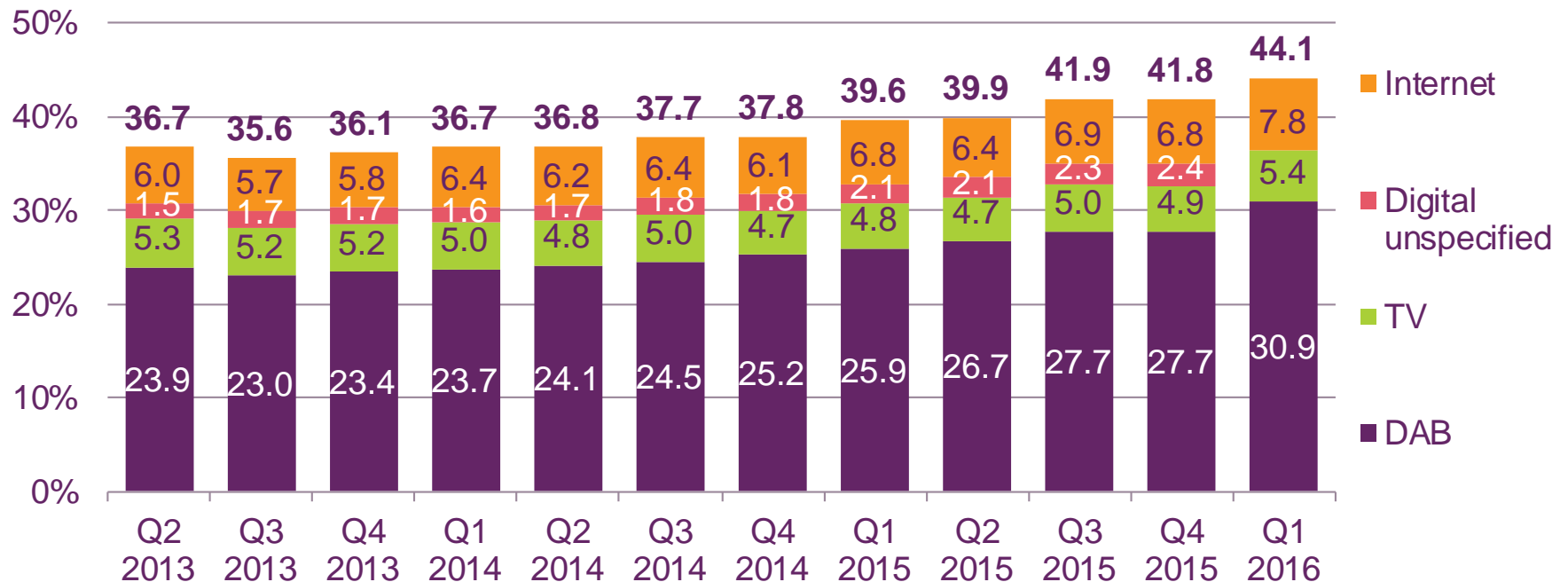


Source: RAJAR, all adults (15+), Q4 of each year, 12 month weighted, all radio TSA

## Figure 3.27

### Digital radio's share of radio listening, Q1 2016

Digital radio platforms' share of all radio hours



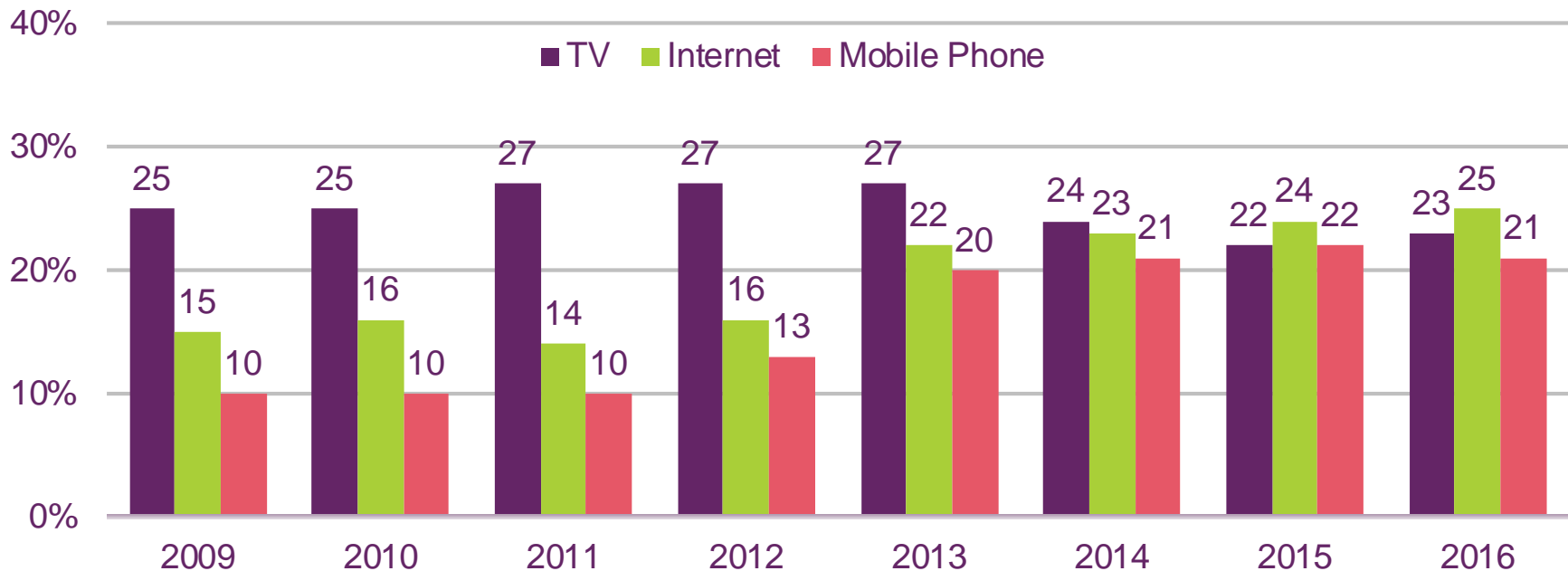
Source: RAJAR

Note: 'Digital unspecified' relates to listening to digital-only stations where the survey respondent has not specified the listening platform used. With effect from Q1 2016 this term has been eliminated. 'Internet' is classified as 'Online/Apps'

# Figure 3.28

## Listening to radio via TV, internet and mobile phone

Proportion of respondents (%) who have listened to radio via digital television, internet or mobile phone



Source: Ofcom Technology Tracker. Data from Quarter 1 of each year 2012-2014, then Half 1 2015-2016

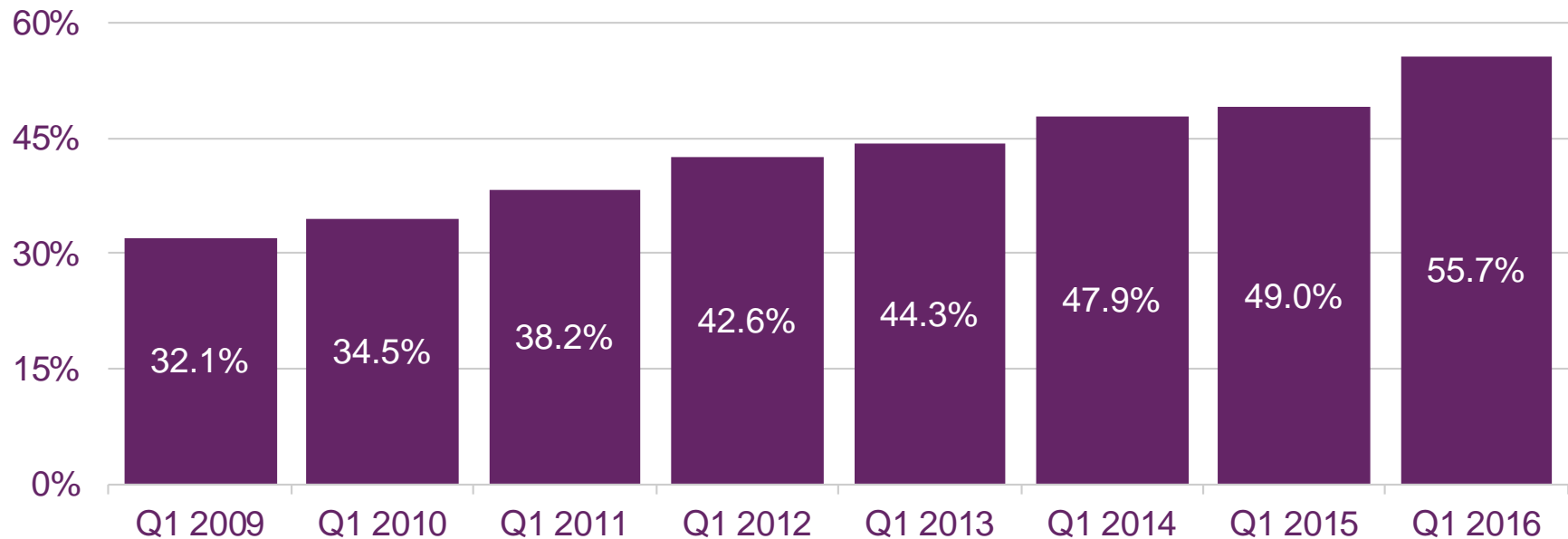
Base: All adults aged 16+ (n = 6090 UK 2009, 9013 UK 2010, 3474 UK 2011, 3772 UK 2012, 3750 UK 2013, 3740 UK 2014, 3756 UK 2015, 3737 UK 2016)

QP11D/E/C: How often, if at all, do you access the radio via – Digital radio via: TV, Internet, mobile phone? \*NB 2013-16 measures for internet combine responses across radio listeners and internet users, 2013-16 measures for mobile phone combine responses across radio listeners and mobile phone users

## Figure 3.29

### Ownership of DAB sets: Q1 2016

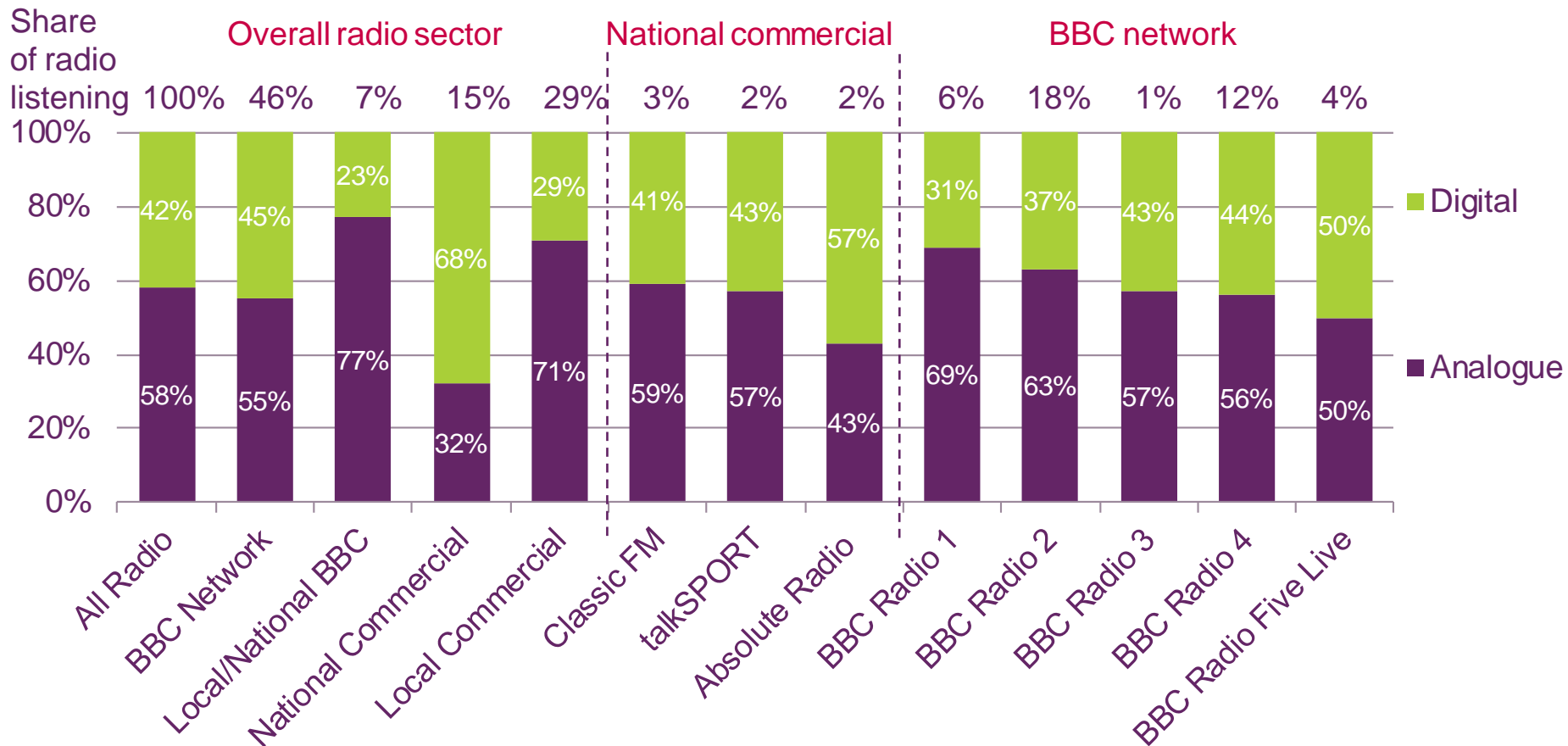
Percentage of adults who claim to own a DAB set / have a DAB set in the home



Source: RAJAR / Ipsos MORI / RSMB Q1 2009-2016

# Figure 3.30

## Platform split by sector and station: year ending Q1 2016



Source: RAJAR, year ending Q1-2016, adults 15+

Note: With effect from Q1 2016 the term 'not stated/specified' was been eliminated.

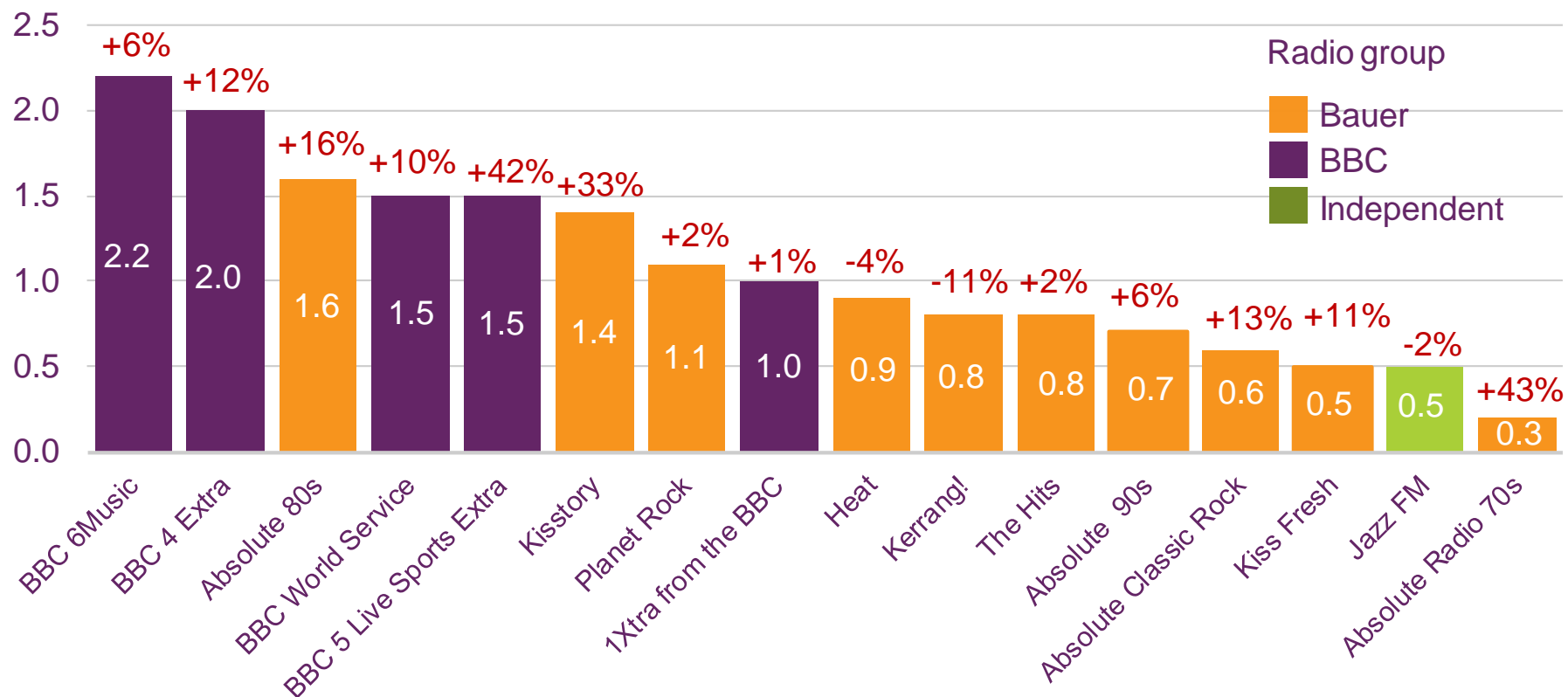
# Figure 3.31

## Most popular digital-only stations - UK, Q1 2016



Average weekly reach year ending Q1 2016 (millions)

% change year on year



Source: RAJAR, year ending Q1 2016 adults 15+