

The First Annual Not 'The Ofcom[®] Digital Radio Progress Report' Report

Grant Goddard
radio specialist

www.grantgoddard.co.uk

August 2010

Contents

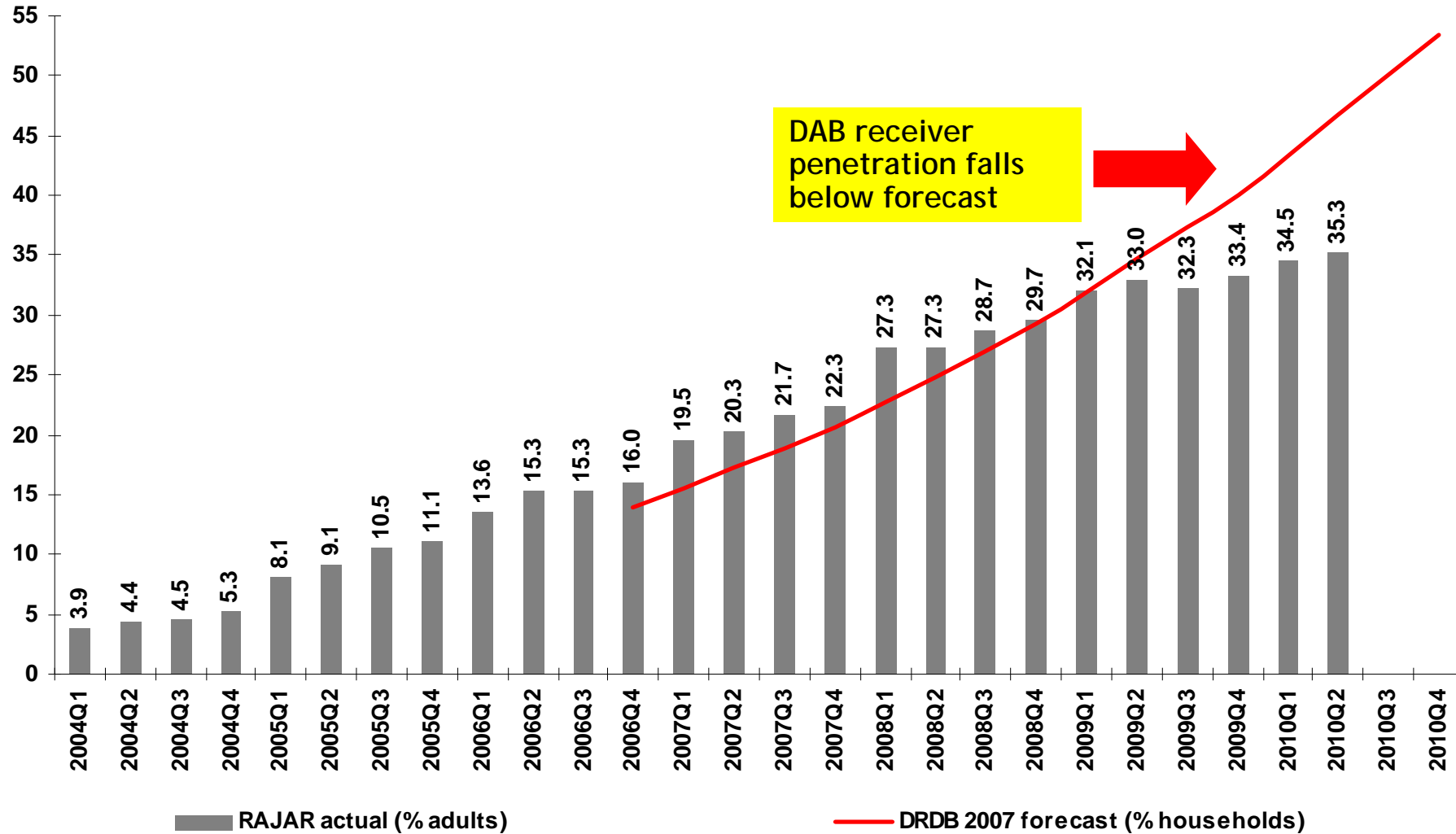
- UK DAB & digital radio forecasts
- UK radio receiver hardware data
- UK digital radio listening data

UK DAB & digital radio forecasts

UK DAB receiver forecast - Digital Radio Development Bureau

radio specialist

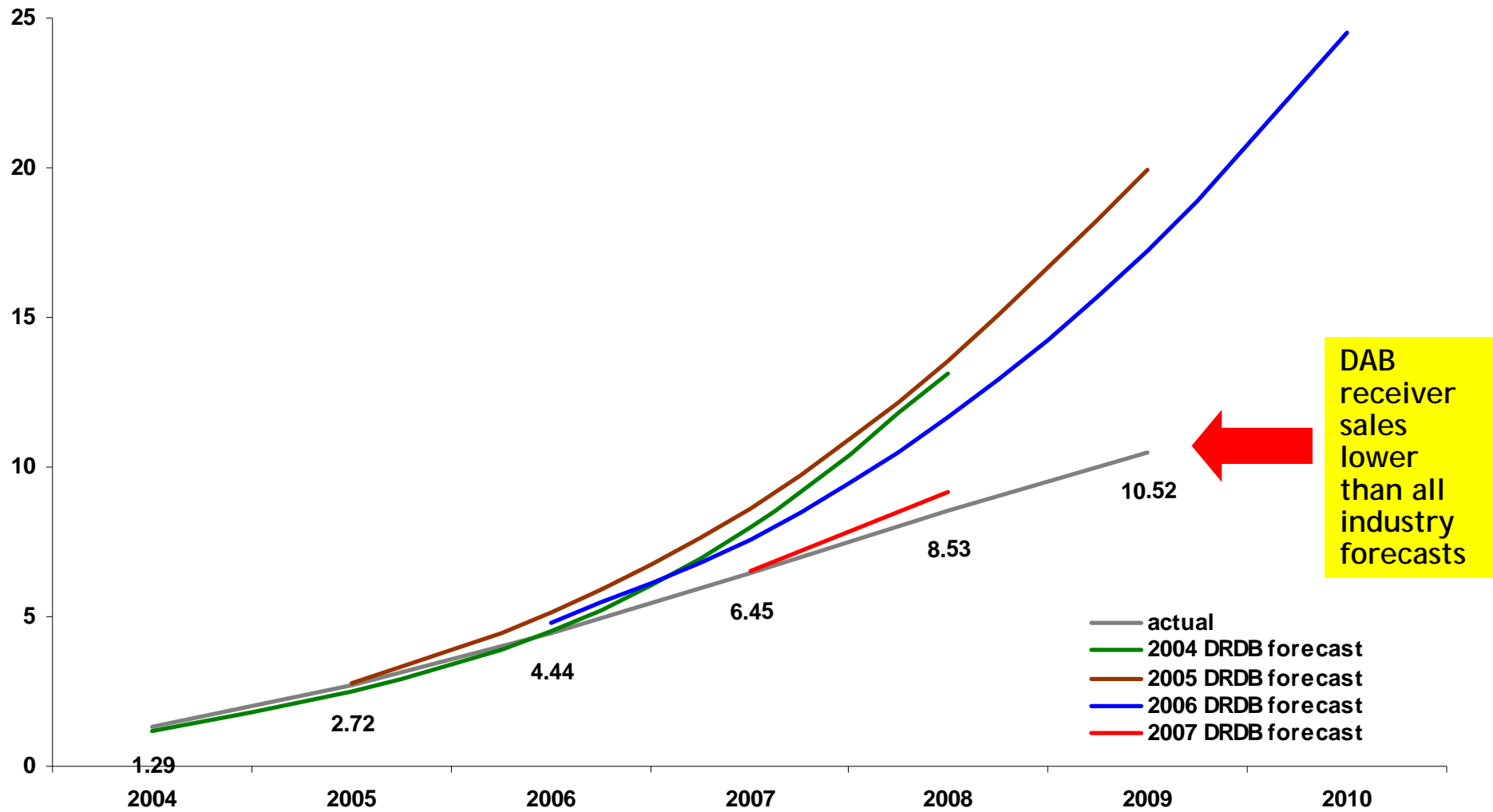
DAB receiver penetration (% adults, % households)



[source: RAJAR, Digital Radio Development Bureau]

UK DAB receiver forecast - Digital Radio Development Bureau radio specialist

Cumulative DAB receiver unit sales (million at year-end)

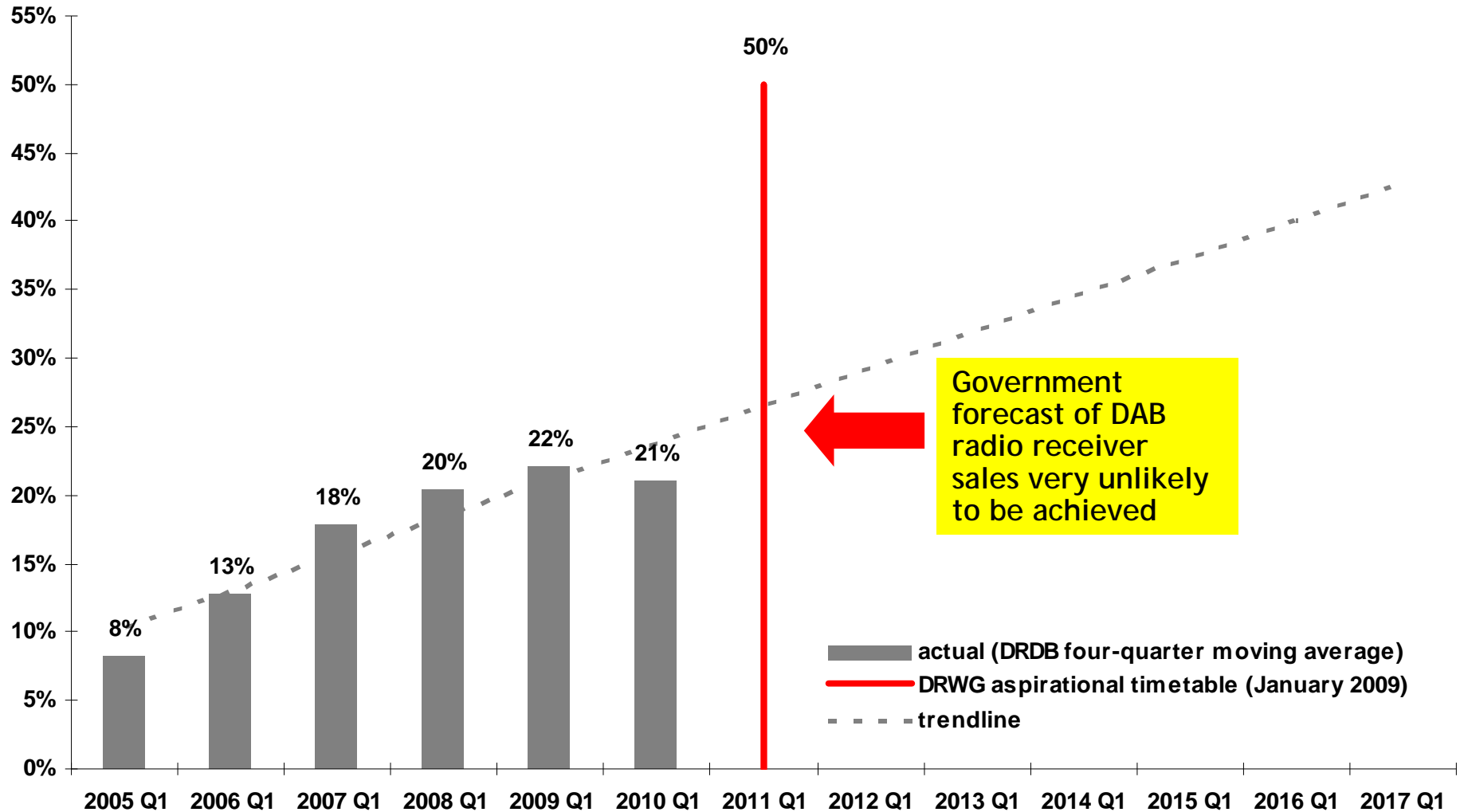


DAB receiver sales lower than all industry forecasts

[source: Digital Radio Development Bureau]

UK DAB receiver forecast - Digital Radio Working Group

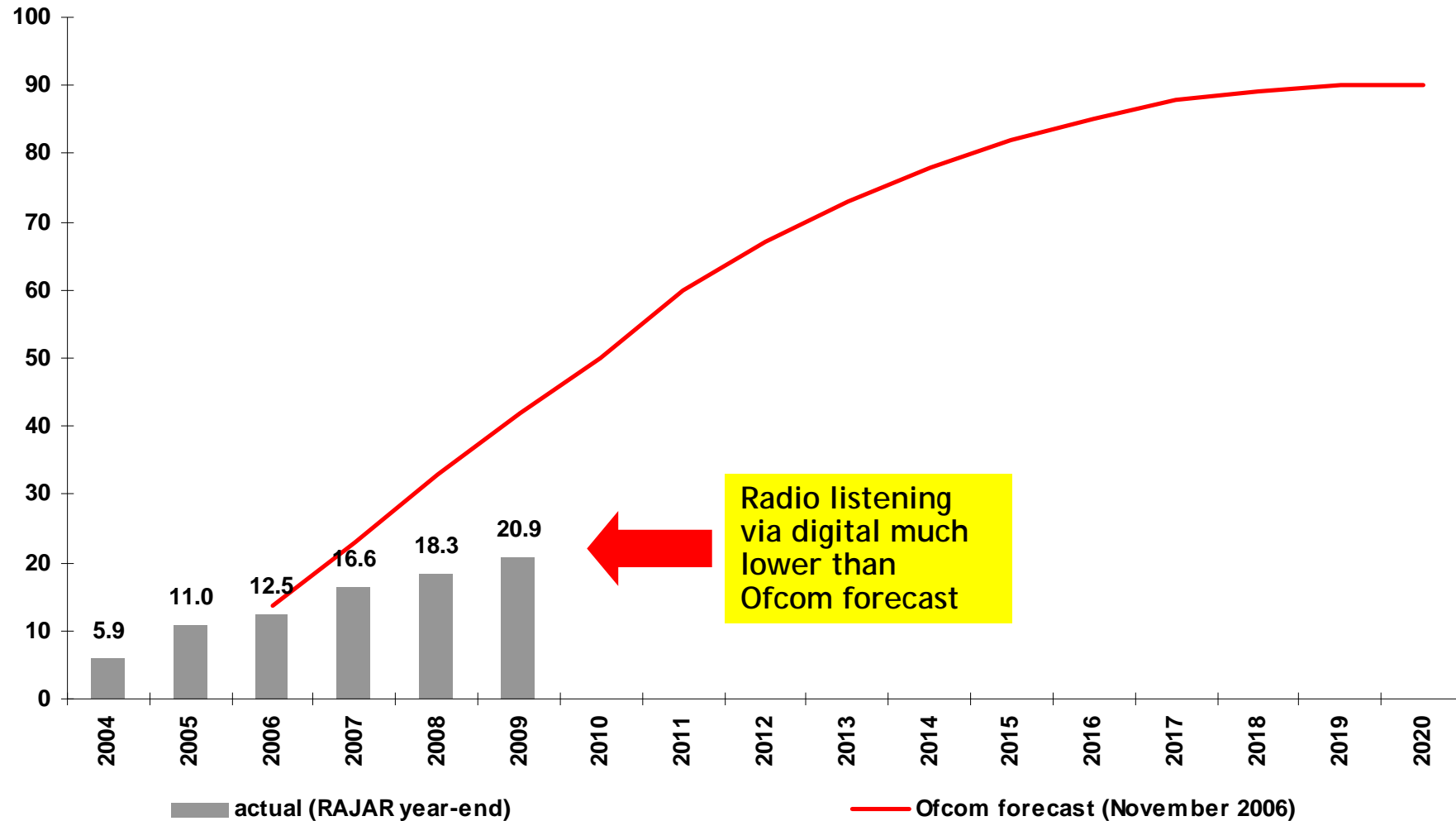
DAB radio receiver sales (% of total radio receiver sales)



[source: Digital Radio Development Bureau, Digital Radio Working Group]

UK digital radio listening forecast - Ofcom

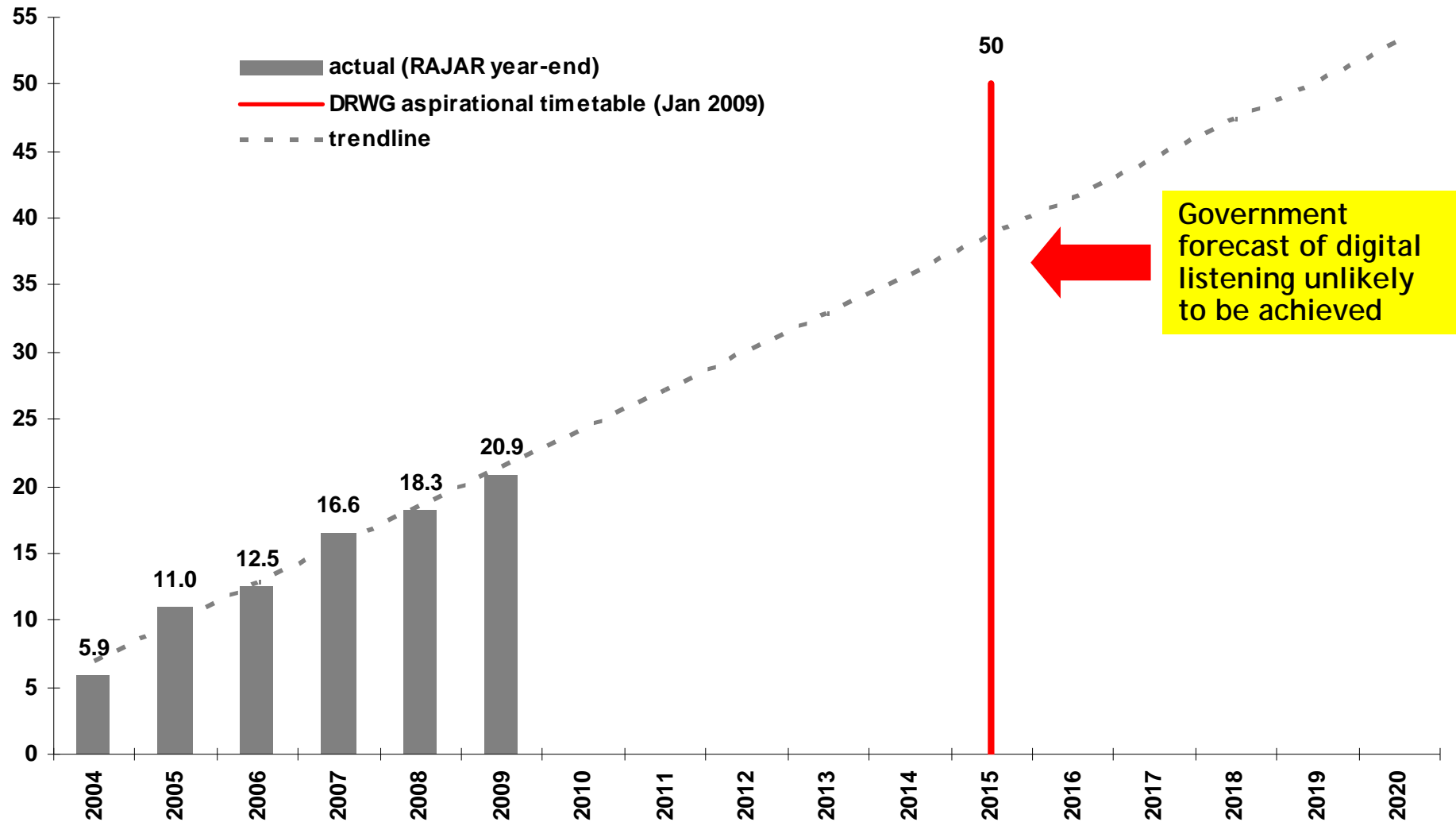
Radio listening via digital platforms (% of radio listening at year-end)



[source: RAJAR, Ofcom]

UK digital radio listening forecast - Digital Radio Working Group radio specialist

Radio listening via digital platforms (% of radio listening at year-end)

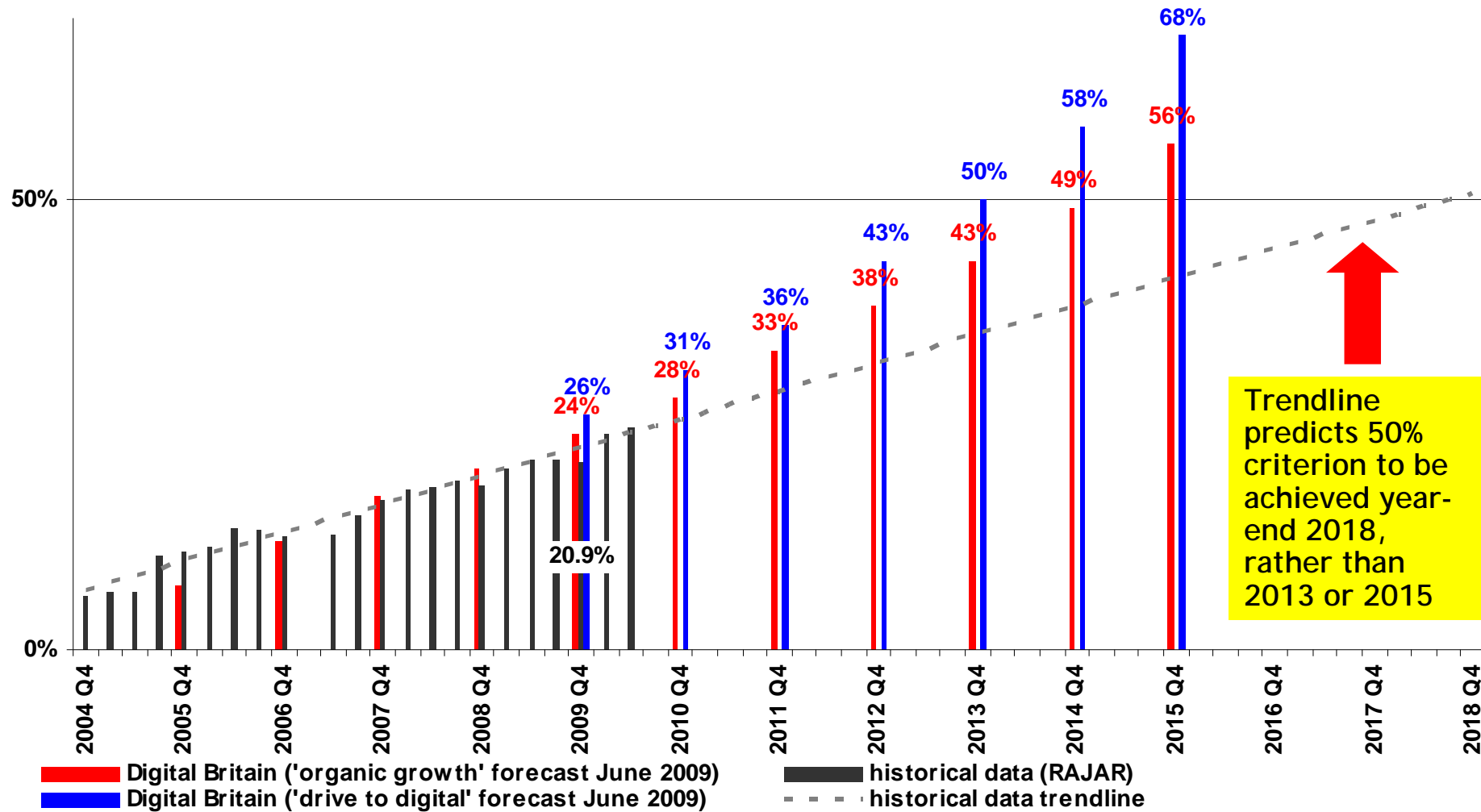


Government forecast of digital listening unlikely to be achieved

[source: RAJAR, Digital Radio Working Group]

UK digital radio listening forecast - Digital Britain

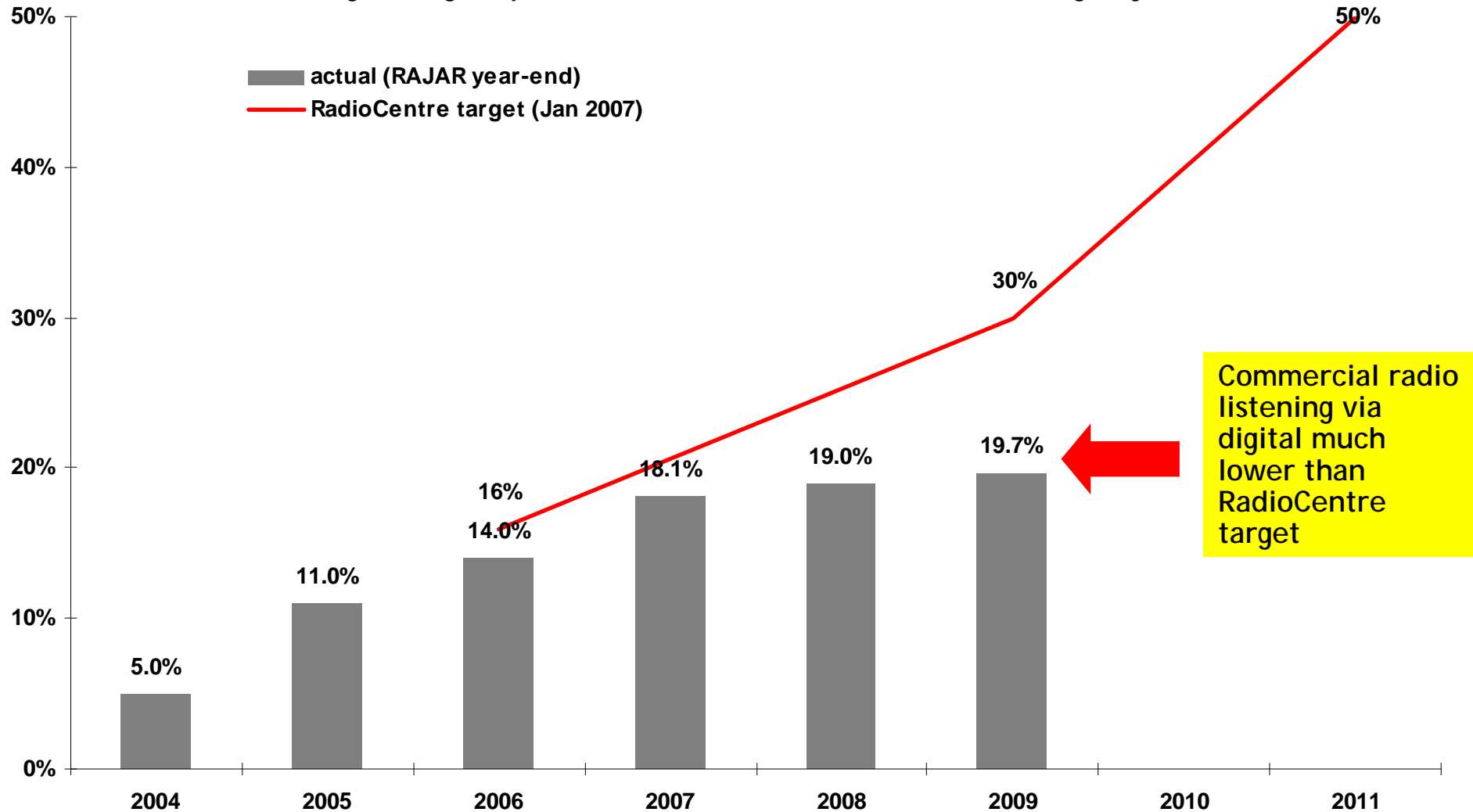
Radio listening via digital platforms (% of radio listening at year-end)



[source: RAJAR, Digital Britain, Value Partners]

UK digital commercial radio listening target - RadioCentre

Commercial radio listening via digital platforms (% of commercial radio listening at year-end)



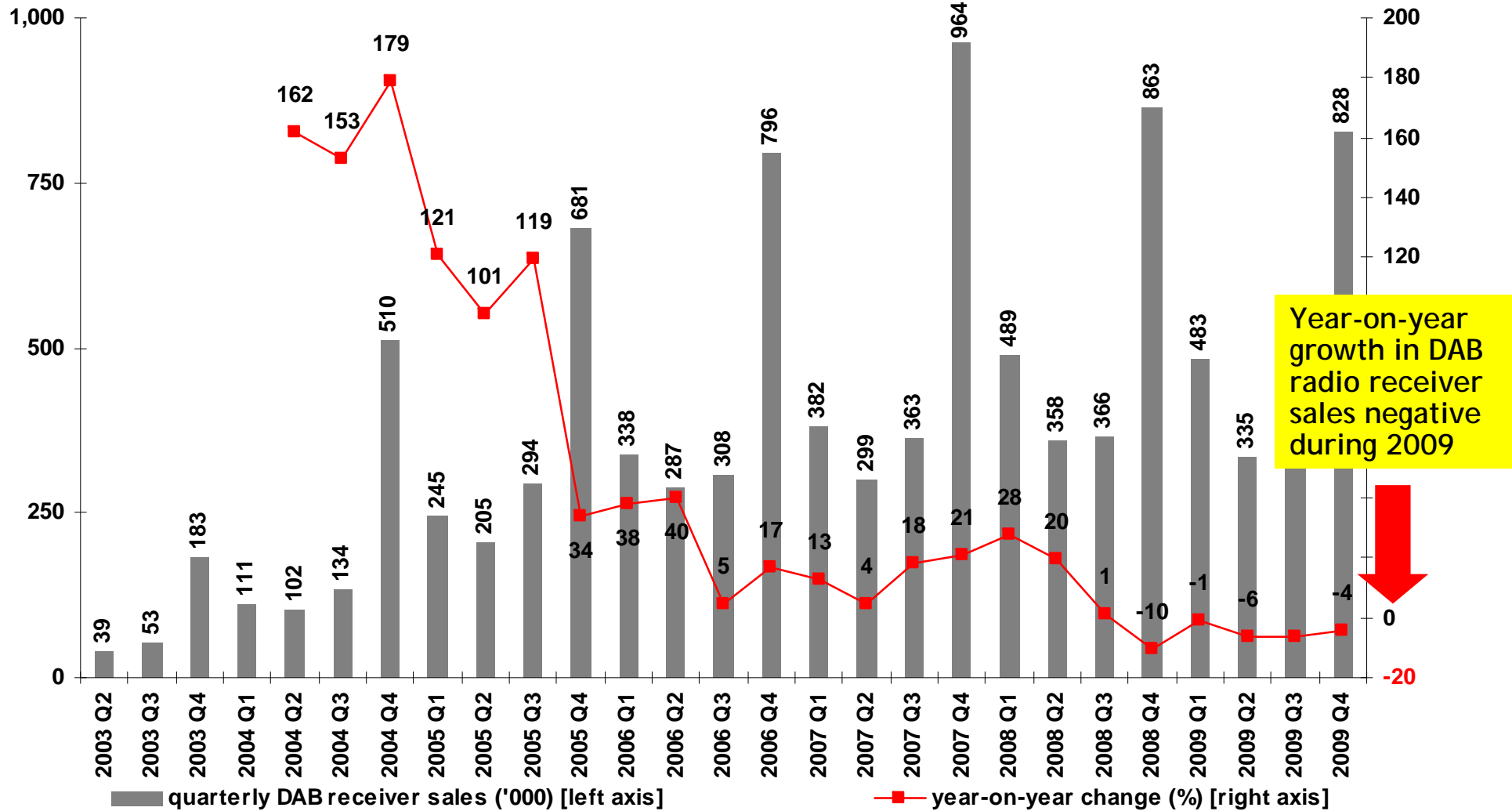
Commercial radio listening via digital much lower than RadioCentre target

[source: RAJAR, RadioCentre]

UK radio receiver hardware data

UK DAB radio receiver sales

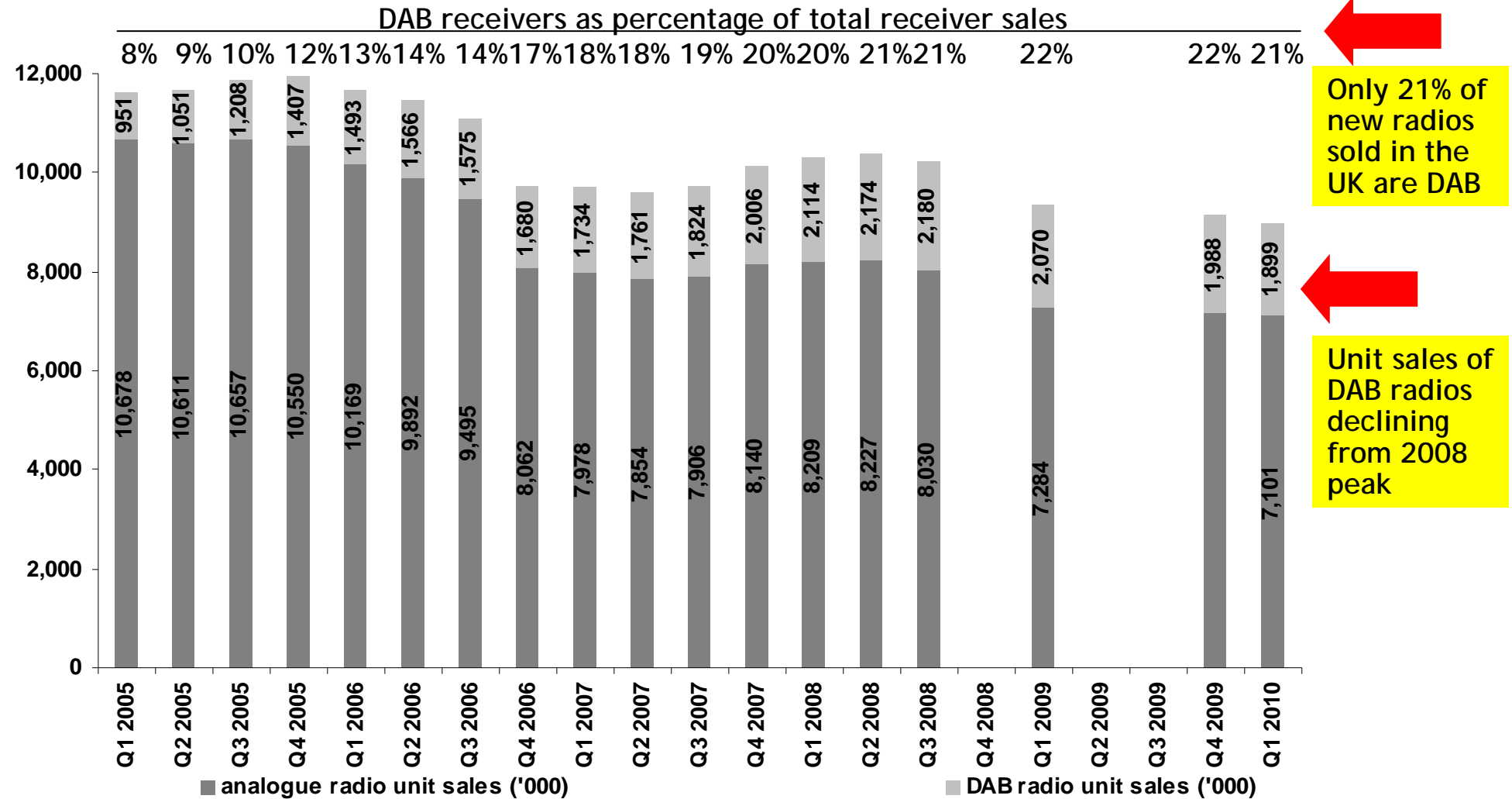
Quarterly DAB receiver sales ('000 units per quarter)



[source: Digital Radio Development Bureau]

UK radio receiver sales

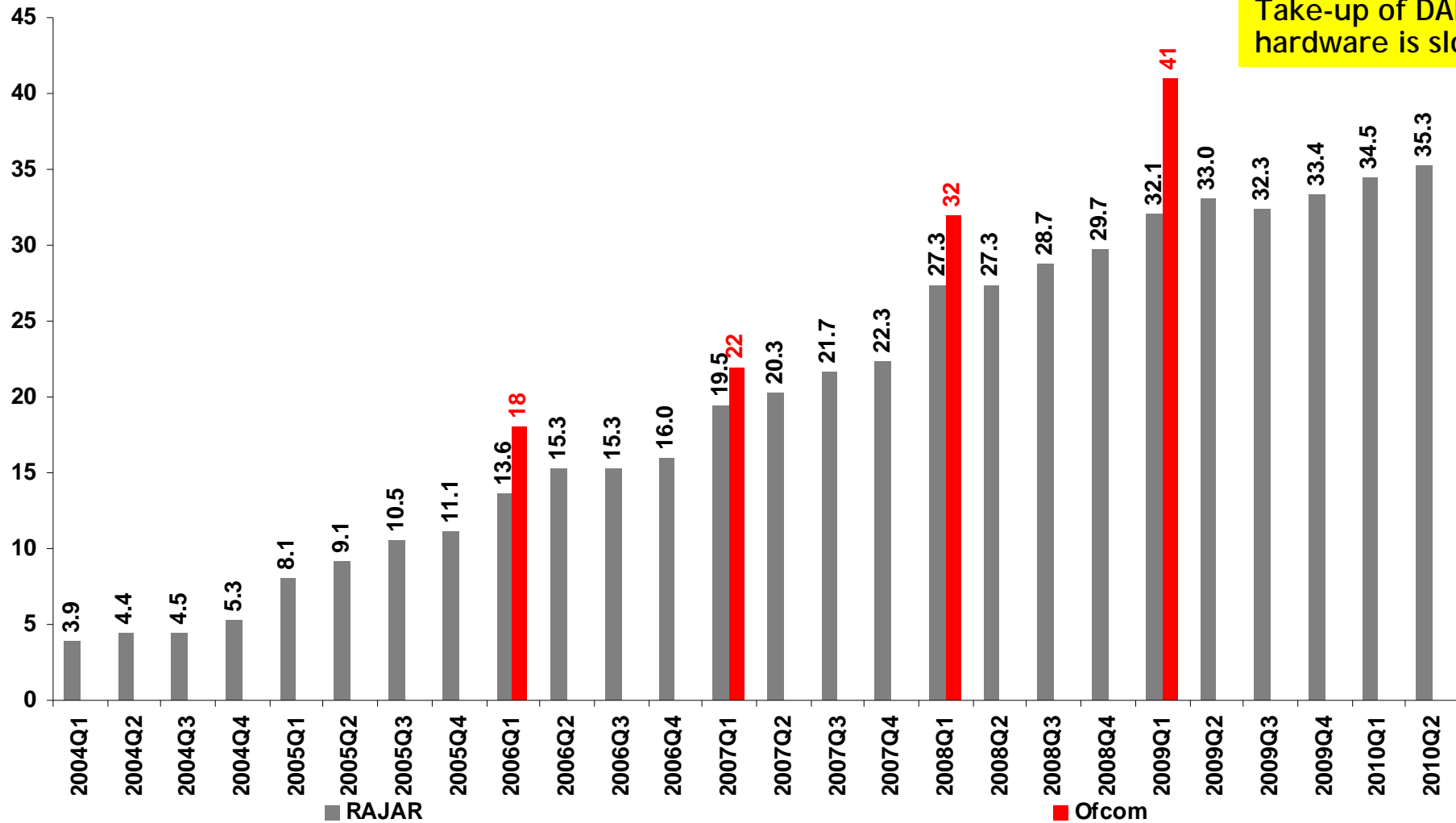
UK radio receiver sales - four quarter moving average ('000 units per annum)



[source: GfK/Digital Radio Development Bureau]

UK DAB radio receiver ownership

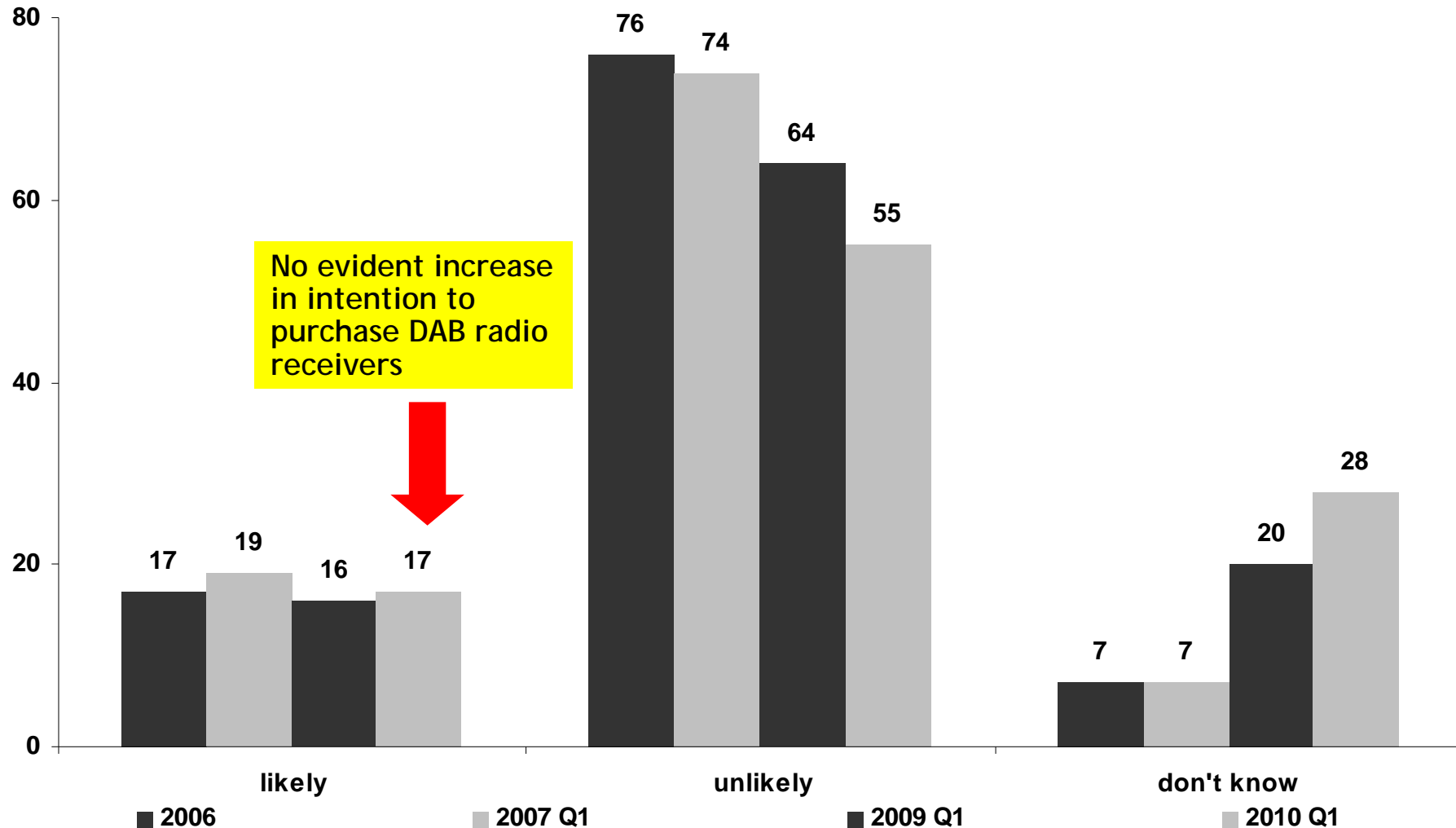
Percentage of adults (15+) who own a DAB radio receiver at home



[source: RAJAR, Ofcom]

UK DAB radio receiver consumer likelihood to purchase

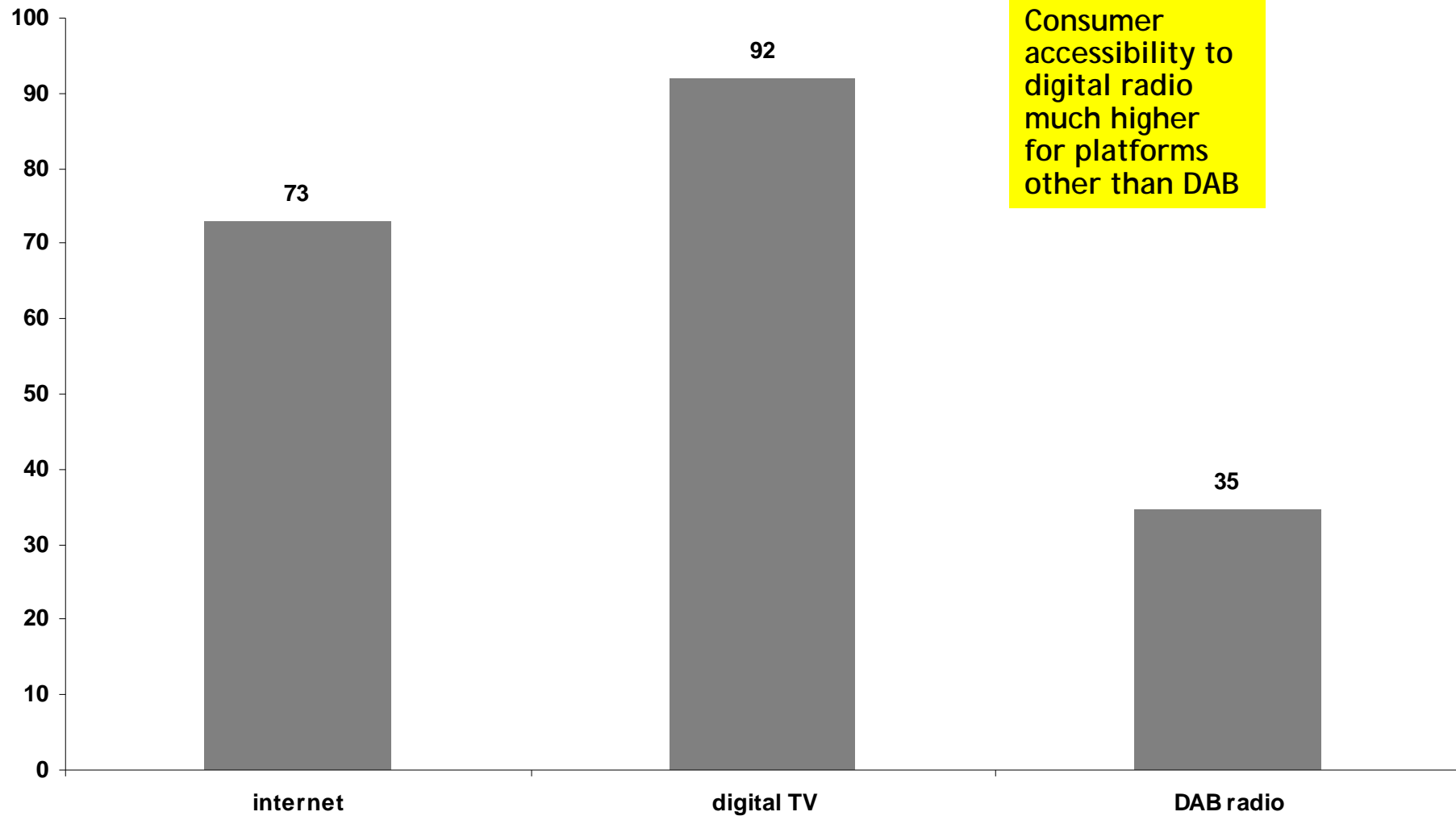
“How likely is it that your household will get a DAB radio in the next 12 months?” (“6 months” in 2006 and 2007) - % of responses



[source: Ofcom]

UK consumer access to digital radio

Access to digital radio platforms (% of UK households)



[Source: Ofcom & RAJAR, Q1 2010]

UK digital radio listening data

UK radio listening by platform

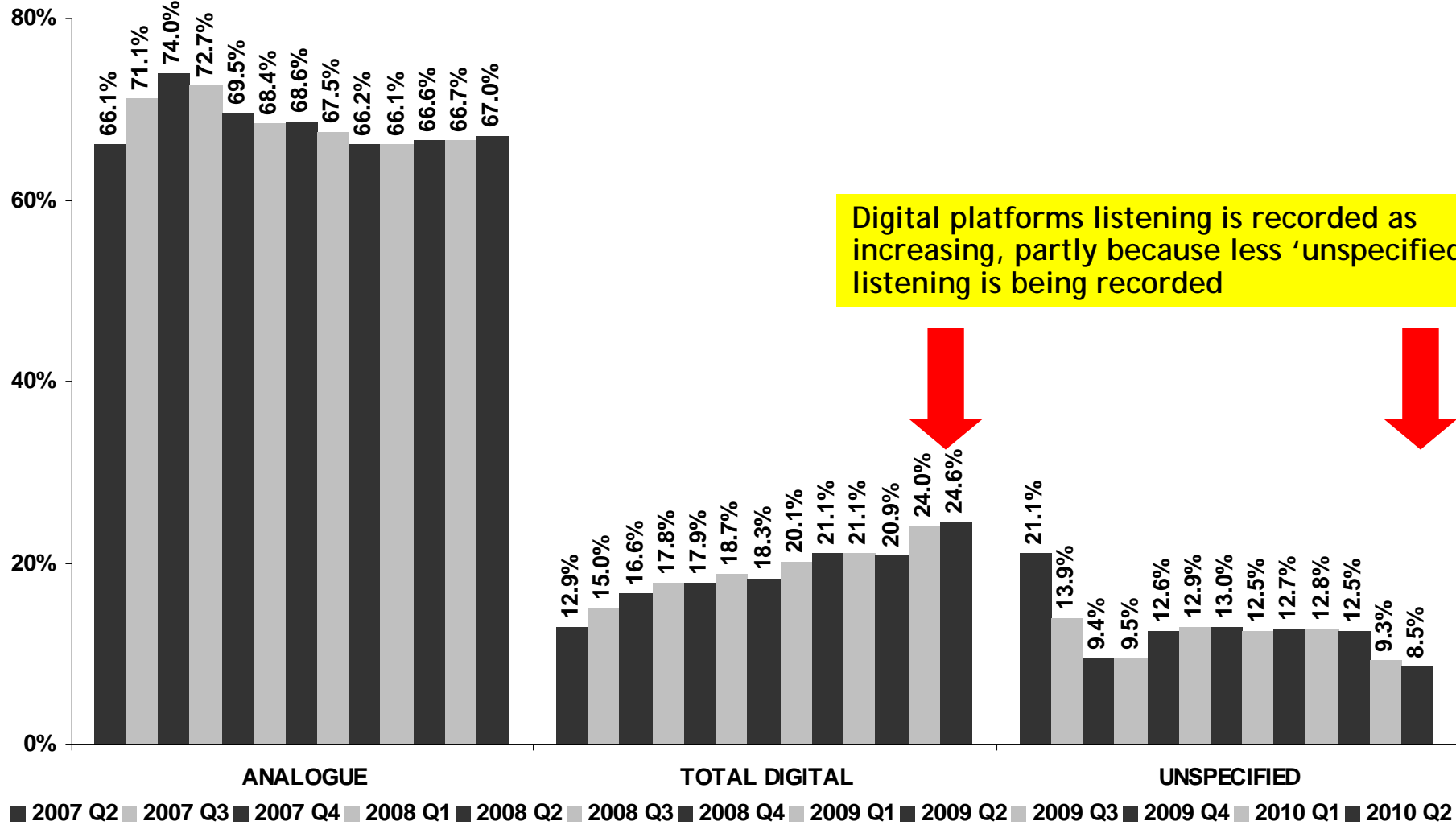
UK radio listening by platform - hours listened (% of total adult hours listened)



[source: RAJAR]

UK radio listening by platform

UK radio listening by platform - hours listened (% of total adult hours listened)

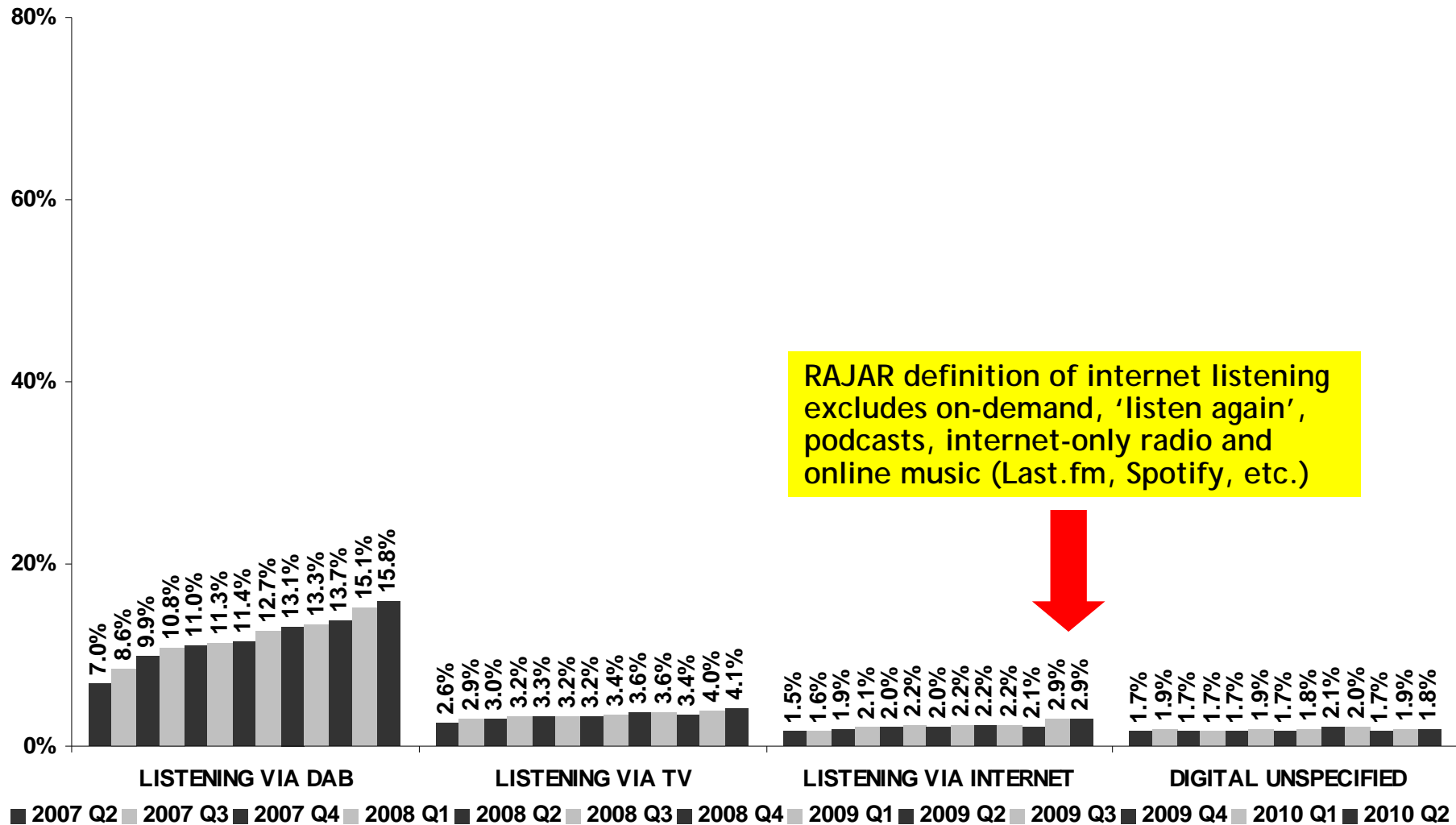


Digital platforms listening is recorded as increasing, partly because less 'unspecified' listening is being recorded

[source: RAJAR]

UK radio listening by platform

UK radio listening by platform - hours listened (% of total adult hours listened)

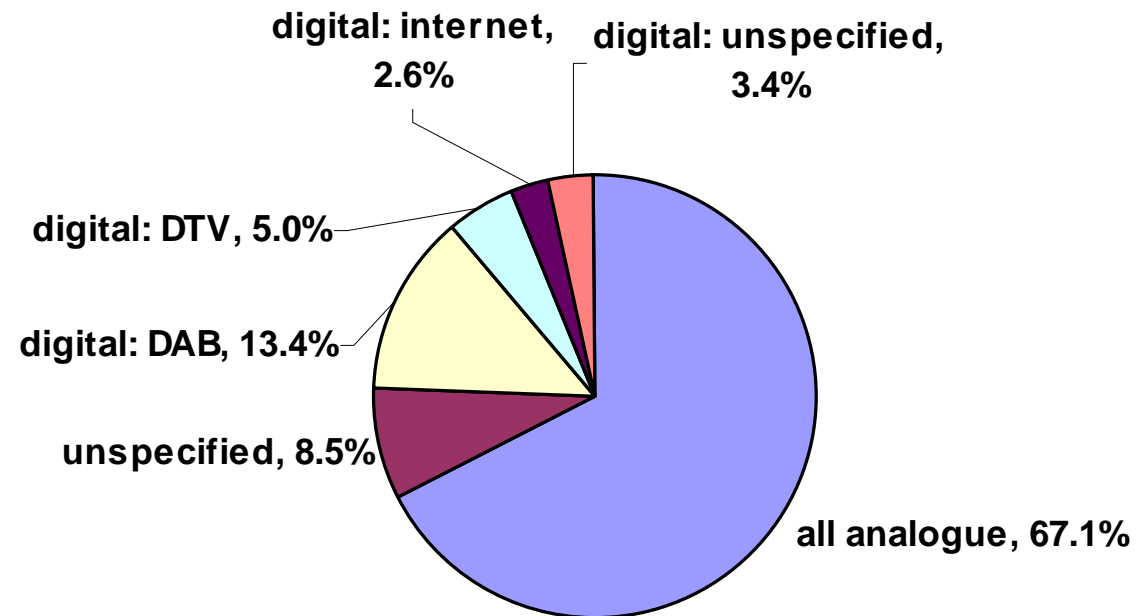


[source: RAJAR]

UK commercial radio listening by platform

UK listening to commercial radio by platform (% of adult 15+ listening)

Commercial
radio platform
share:
DAB = 13%

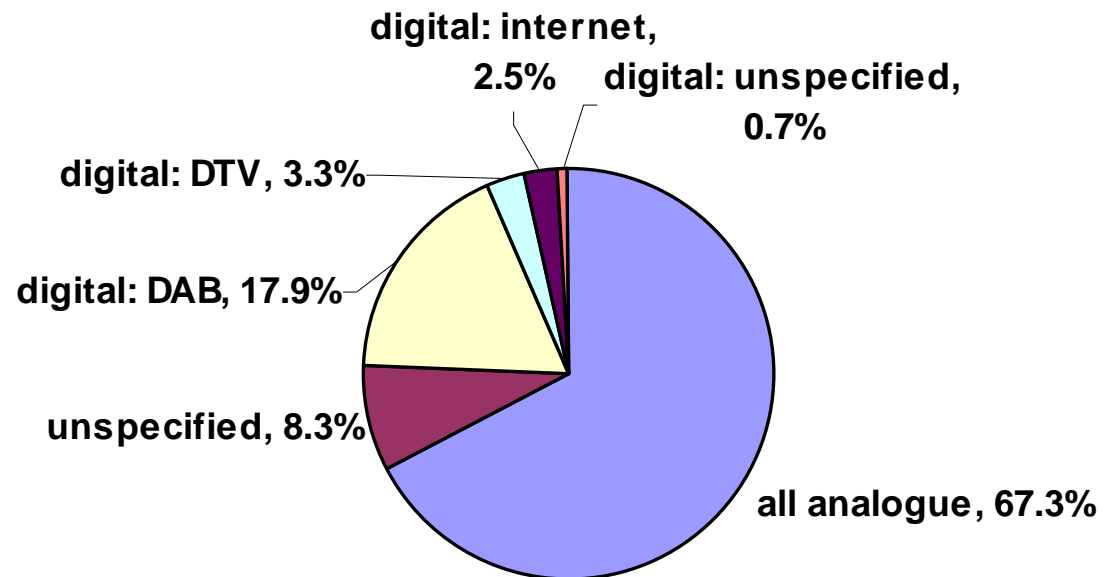


[source: RAJAR, Q2 2010]

UK BBC radio listening by platform

UK listening to BBC radio by platform (% of adult 15+ listening)

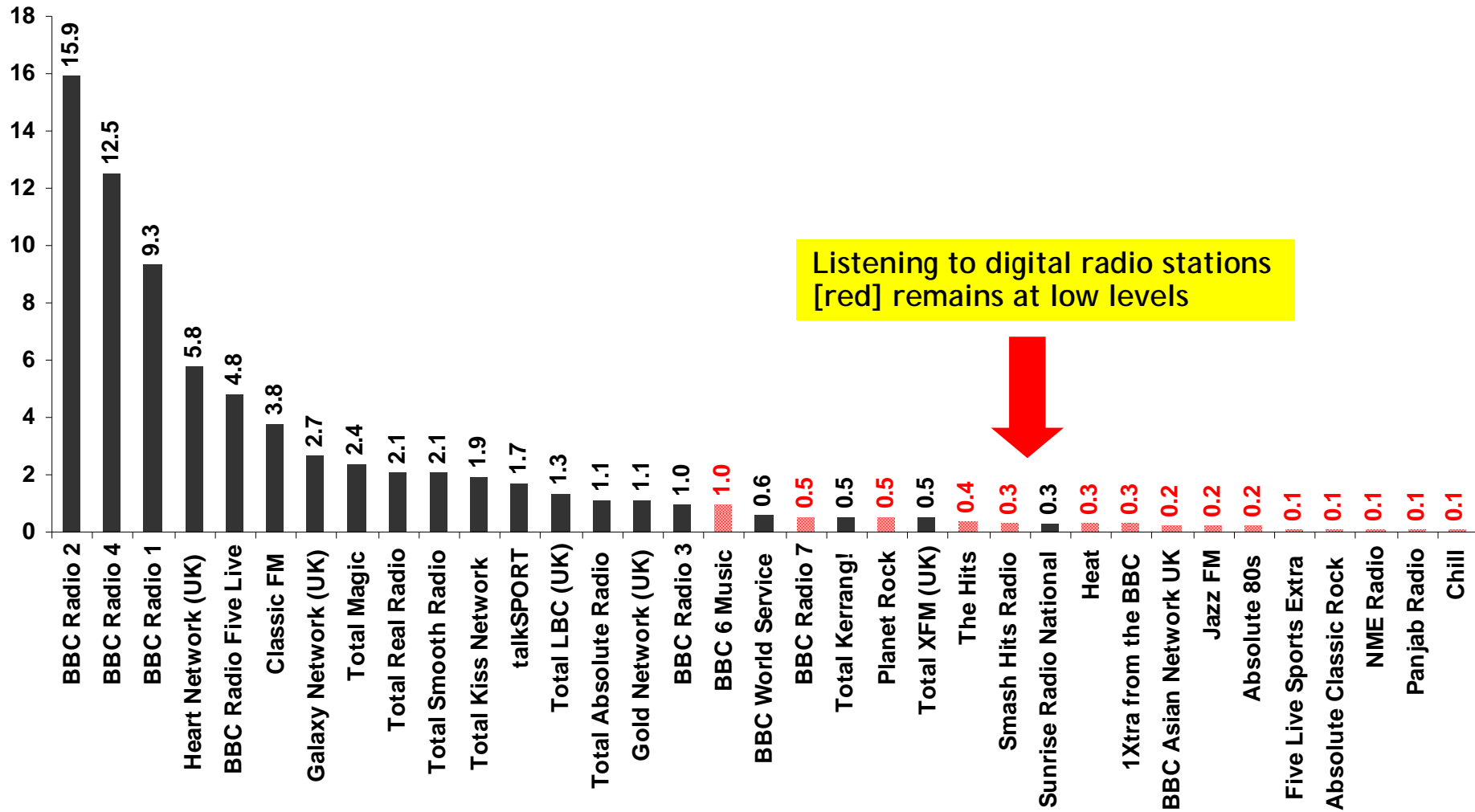
BBC radio
platform share:
DAB = 18%



[source: RAJAR, Q2 2010]

UK listening to national radio stations

Share of UK radio listening (% of adult 15+ hours listened)



[source: RAJAR, Q2 2010]

UK digital radio stations on 'Digital One' national DAB platform radio specialist

National digital radio stations

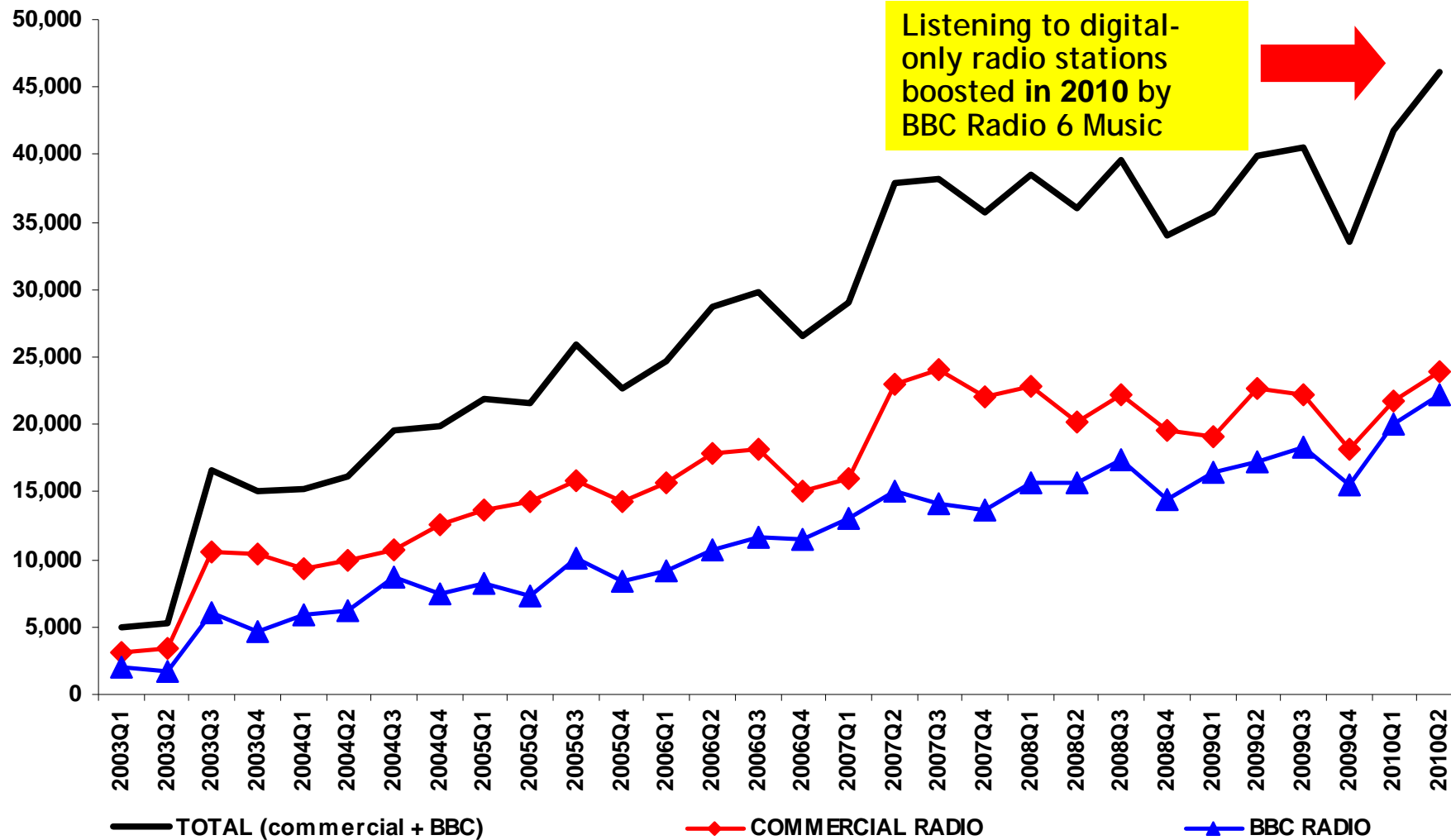
launched on national DAB	owner	station	business model	digital platforms					trial period (expired)	RAJAR Q2 2010	
				national DAB	local DAB	Freeview	FreeSat	internet		% share of total radio listening (adults)	weekly reach (adults)
1999	-	Planet Rock	commercial							0.50	718,000
2010	TIML	Absolute 80s	commercial							0.15	288,000
2009	-	Premier Christian Radio	donations								
2009	-	UCB UK	donations								
2009	-	Amazing Radio	unsigned music					6 months			
2008	-	BFBS Radio	government					3 months			
2009	IPC	NME Radio	commercial					8 months	0.13	253,000	
2009	-	Panjab Radio	commercial					6 months	0.07	155,000	
2009	Folder Media	Fun Kids	commercial					4 months			
2006	GCap Media	TheJazz	commercial					closed 2008			
2000	GCap Media	Capital Life	commercial					closed 2008			
2000	C4 + UBC	Oneword Radio	commercial					closed 2008			
1999	GCap Media	Core	commercial					closed 2008			
2000	Saga	PrimeTime Radio	commercial					closed 2006			
2000	Bloomberg	Talkmoney	commercial					closed 2003			
2000	ITN	ITN News	commercial					closed 2002			
% SHARE OF ALL RADIO LISTENING									0.85		
% SHARE OF LISTENING VIA DIGITAL PLATFORMS									3.48		
% SHARE OF LISTENING VIA DAB PLATFORM									5.43		

Many commercial digital radio stations have closed

[source: RAJAR]

UK radio listening to digital stations

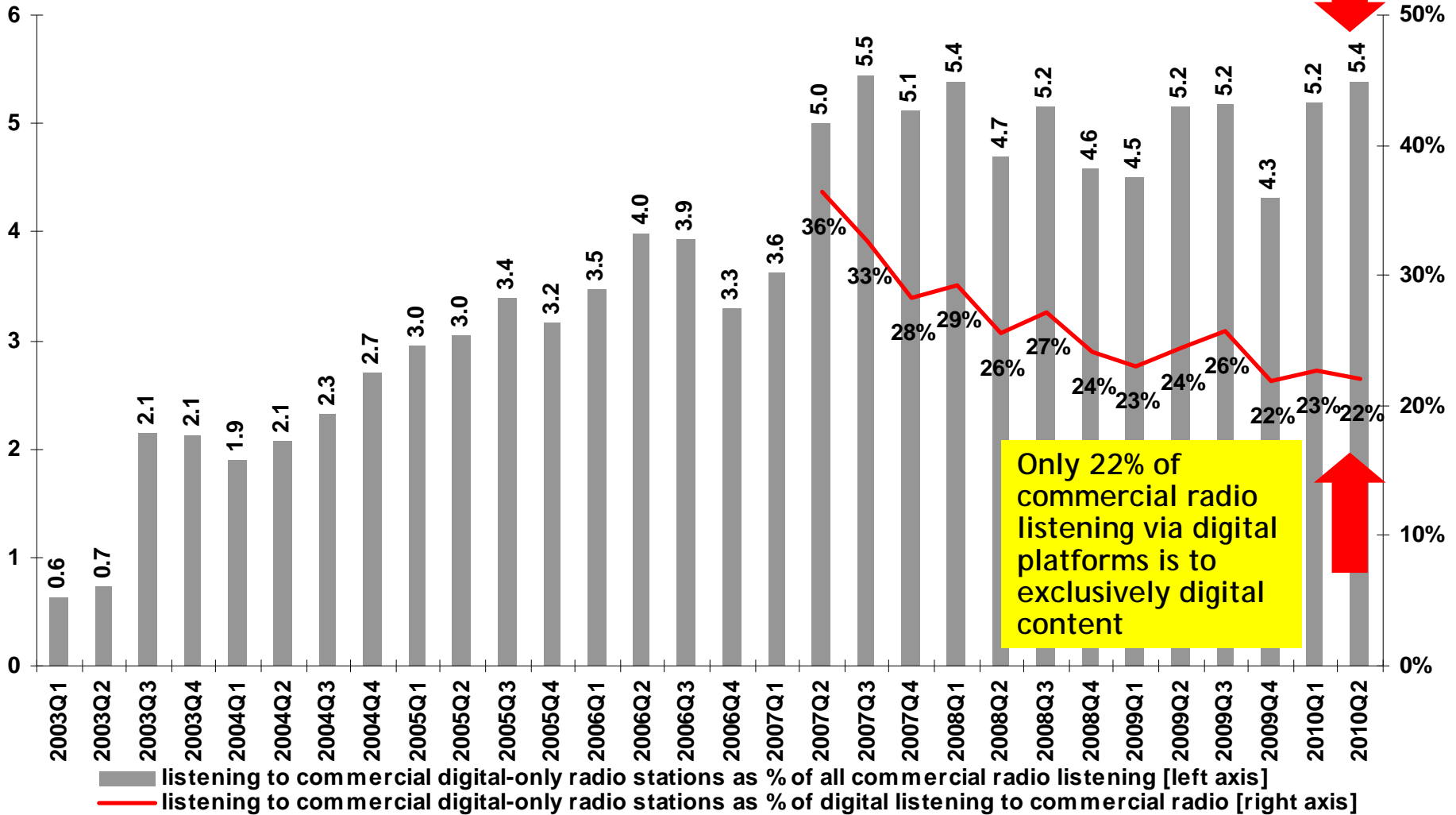
UK listening to digital-only radio stations - '000 hours per week (adults 15+)



[source: RAJAR]

UK commercial digital-only radio station listening

UK listening to commercial digital-only radio stations (adults 15+)

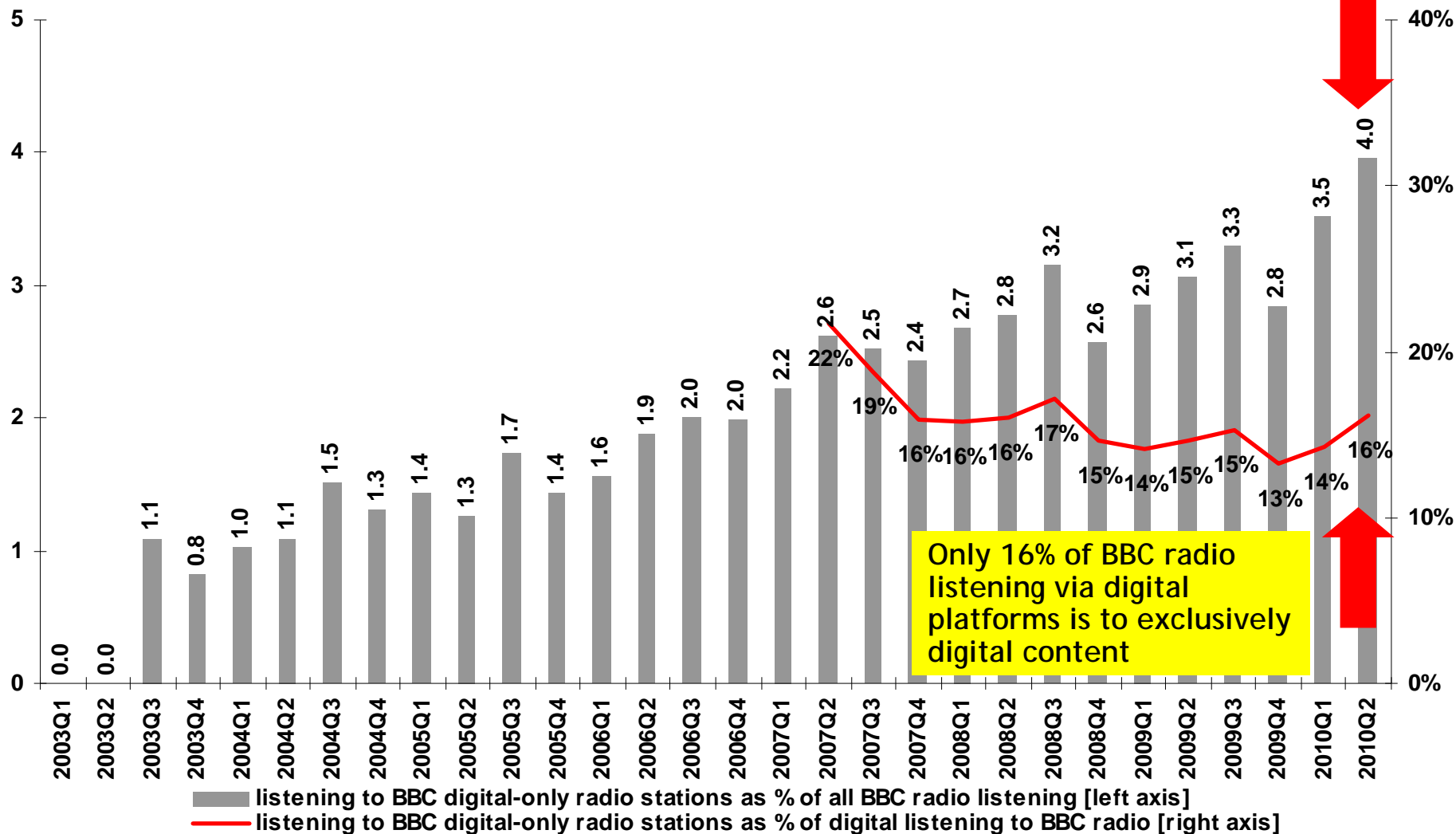


[source: RAJAR]

UK BBC digital-only radio station listening

UK listening to BBC digital-only radio stations (adults 15+)

Only 4% of BBC radio listening is to exclusively digital content



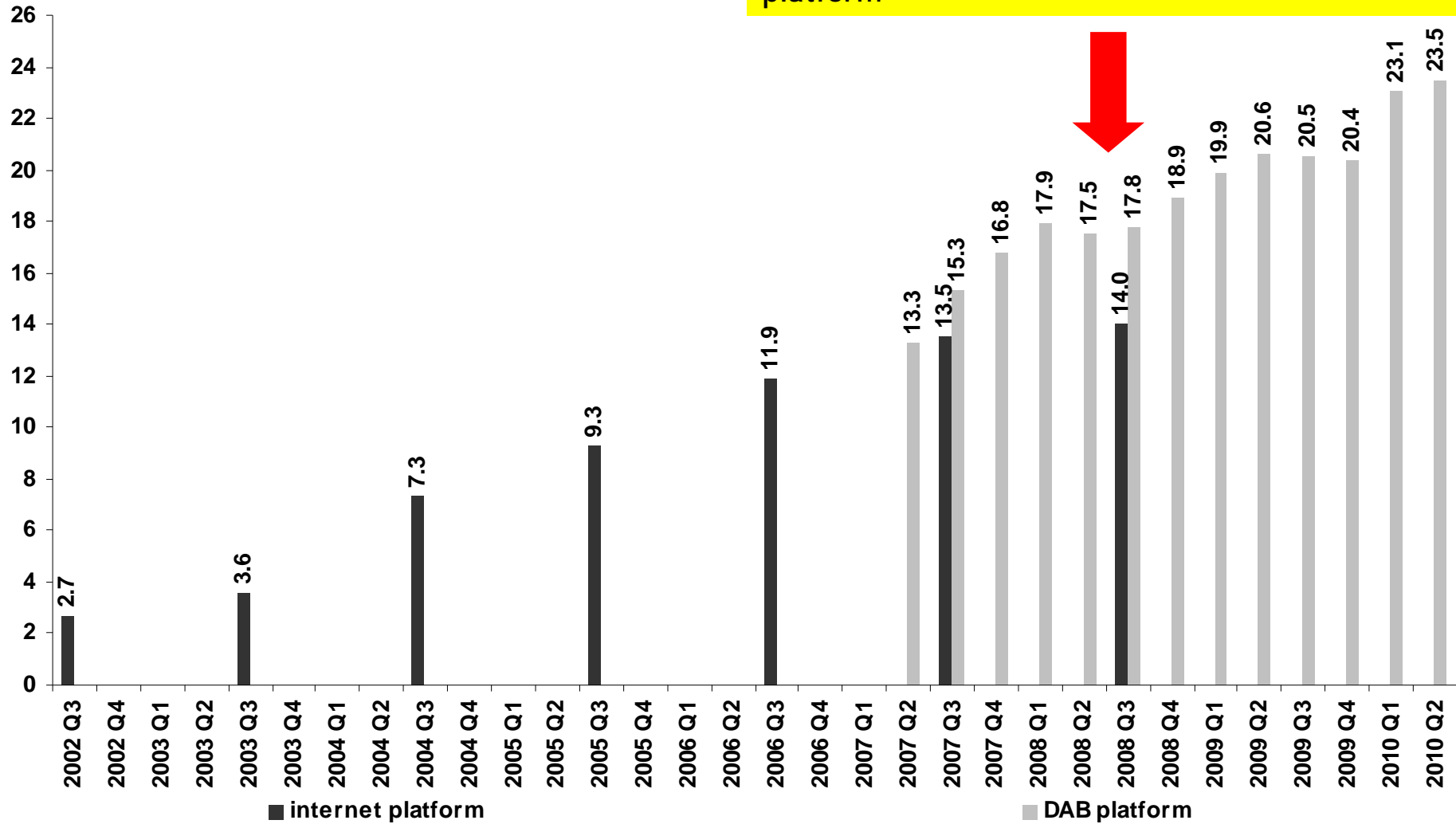
Only 16% of BBC radio listening via digital platforms is to exclusively digital content

[source: RAJAR]

UK radio listening by platform

Weekly reach of radio platforms (% of adults 15+)

A separate RAJAR 'MIDAS' survey (that includes non-linear radio consumption) demonstrates that internet-delivered radio reaches almost as much of the UK adult population as the DAB radio platform



[source: RAJAR MIDAS]