

# Digital Radio Review

Presentation by **PwC Research**  
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**01**

Background and Objectives

# Background and Objectives

The aim of this project was to build upon quantitative research from a BBC Pulse Survey to further understand attitudes towards smart radios and DAB including considerations of the devices and genuine intention to purchase.

## Research Objectives

- 1 Explore the appetite of purchasing a DAB or smart radio and identify the factors that would convert from consideration to purchase as well as the barriers
- 2 Understand the benefits and drawbacks of devices currently used to listen to radio
- 3 Understand the appeal and barriers of DAB and smart radios in detail
- 4 Understand the purchase drivers for DAB sets and smart radio
- 5 Identify future radio listening behaviour if AM / FM was switched off

# Methodology

## 1 Short pre-task diary

- A small set of questions to establish current radio habits (where / when / what and why)
- More of a reflection on current habits, in order to establish existing behaviours and device usage to help clarify and comprehend set-ups ahead of the group sessions

## 2 3 x video group sessions

The groups covered:

- Current devices used to listen to radio
- The appeal of DAB / smart radio
- The appetite of DAB / smart radio and the purchase decision making involved

**Sample:** 14 participants, 3 groups

| Age of Audience | Do not own / use smart radio or DAB                                         | Own / use a smart radio or DAB               | Total groups |
|-----------------|-----------------------------------------------------------------------------|----------------------------------------------|--------------|
| 18 - 34         | <b>Group A</b><br>1 x mini-group of 4 people<br>(Listen via online devices) | <b>Group B</b><br>1 x mini-group of 4 people | 2            |
| 45+             | <b>Group C</b><br>1 group of 6 people<br>(AM / FM listeners only)           | -                                            | 1            |
| Total           | 2 sessions                                                                  | 1 session                                    | 3 groups     |

### General Criteria:

- All should listen to live radio (a mix of BBC stations and commercial) at least once a week in their home
- All must not reject the idea of buying a radio device in the future
- Mix of gender / ethnicity / locations across each video group



02

Current Radio Device Use

# Young DAB owners appreciate the upgrade from AM / FM but are not super excited about their device

Commonly found in **'hubs' of the home**, such as kitchens / bedrooms for **background noise** or home office to **keep occupied whilst working**. Used as part of **daily routine**.



## Advantages of DAB listening

- Good sound quality compared to phone
- Easy to flick between a wide variety of channels
- Nice decorative piece
- Wide range of channels
- Discover new digital stations
- Also used as an alarm / clock

"I listen to digital channels instead of listening to FM channels. There is a lot more variety and the sound quality is much better with no interruption as it is digital"

Female, 34, DAB owner

"I would recommend [DAB] but wouldn't be that enthusiastic about it as you can listen to the radio on anything so don't spend too much money "

Male, 28, DAB owner



## Disadvantages of DAB listening

- Hassle to move around
- Some only play radio; single use device seen as behind the times
- Effort to put on as no voice activation
- Not being able to see what song is playing seen as a pain point

**Young DAB owners** are satisfied with their devices but only use in the room of the house it is kept. If not in the room with their DAB device will turn to other devices to listen to radio (e.g. phone, smart speaker, tv)

# AM / FM only users have had their device for ages as they are comfortable using and have formed an emotional connection

Mainly used in **kitchens and bedrooms**, but can also be found in living rooms. Tend to keep device in one room, but some carry a portable device around the home.



## Advantages of AM / FM listening

- Familiarity with the device makes easy to use
- Discovery of new stations while tuning
- Seen as simple technology - easy to use, single purpose so know what you are getting e.g. radio
- Enjoy physicality of tuning stations; nostalgic
- Longevity of devices suggests quality

“ It is something that did not cost a lot of money a long time ago and still works perfectly well. Simple but gives you a lot of pleasure”

**Female, 55, AM/FM owner**

“I used to have a very old radio with preset stations. One difficulty I had with my existing radio is you have to tune it so it does not interfere with other stations”

**Male, 55, AM/FM owner**



## Disadvantages of AM / FM listening

- Aware sound quality not as good as other devices; signal not always as clear as digital stations
- Finding the optimum position with the dials can be tricky

AM / FM only listeners remain happy with their radio provision, despite acknowledging they are newer and objectively better devices available; unwilling to switch unless it is necessary to do so

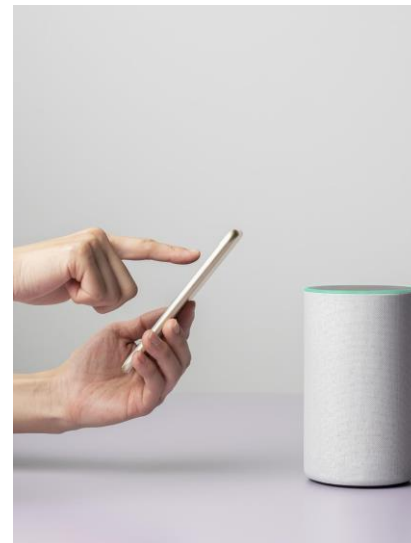
# Younger audiences have become more reliant on using smart devices as their main audio and radio device

## Phone

- Phones have music, radio and podcasts all in one place, providing a greater **variety** of content
- As phones keep advancing, **accessibility** to listen to audio becomes **easier**
- Always have their phones on them so **convenient option**

## Smart speaker

- Some listeners have turned to smart speakers due to the extra level of **convenience** they provide
- **Recommendations** from friends and general word of mouth reviews encourage more listeners to purchase smart speakers. Expect people to become more **reliant** on them as more people start to buy them



Using a device specifically for radio is not an established behaviour. For some younger audiences, and with so many different options available for radio content, it's hard to see the need for a specific radio device - challenge for DAB / smart devices to be seen as relevant for this group



03

Awareness and perceptions of DAB / Smart Radio

# All non-owners aware of DAB - but current AM / FM only listeners are much more open to it

## 18 - 34 Non-DAB owners

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**Don't see the value** in a device that can only be used as a radio

**Unclear what the benefits of DAB are** over other devices they currently use

**Old fashioned** compared to smart speakers

Perception it would be **more expensive** than a smart speaker

Additional features of DAB sets should be clearly highlighted to younger audiences to help dispel the perception that DAB is only single use and 'old fashioned'.

## 45 + AM / FM only listeners

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A **newer version of AM / FM** - but not cutting edge. Familiarity from car radio

**Station signal** and **choice of stations** an upgrade from AM / FM device

Appreciate that it's still 'just a radio' and **not too complicated**

But, potentially **more difficult to use** and **less reliable** than current radio as it is 'new technology' and not built to last

For AM / FM only users the ease of use needs to be highlighted to mitigate worries of the device being complicated

# Low awareness of smart radios but the term 'smart' sets some expectations

## Spontaneous impressions of smart radio

- **None familiar** with smart radios
- **Mistaken** as another term for a smart speaker
- Most younger listeners had knowledge of smart speakers, so the use of 'smart' led them to expect the device to provide **voice activation**, **bluetooth** capabilities and a **WiFi** connection.

### Smart Radio

Connects to the internet via WIFI to allow you to listen to digital stations online, in addition to all of the stations on DAB, DAB+ and FM. There are lot of radios to choose from such as portables, bedside clock radio or integrated into home audio systems.



## After smart radio definition was provided

18 - 34

### Non-DAB owners

**Unsure as to where it would fit into current listening** behaviour but more likely to consider than DAB due to smart functionality

18 - 34

### DAB owners

Appealing as an **upgrade** to DAB / interest in having the 'latest' thing but would not purchase unless their current DAB broke; not seen as a **necessity**

45+

### AM / FM owners

Mixed appeal - would need some **explanation** to understand how it would work via internet and what would happen if the internet failed

Appeal of smart radio increased among most current radio device owners (especially younger) when hearing more about them. Young DAB owners were interested to do further research as they are interested in having the latest technology. Raising awareness of smart radio amongst audiences important in order to be considered



04

Appeal of DAB / Smart Radio features

# Radio devices that include both important and expected features are the most desirable

## Important and expected

Feature radio must have to be considered

## Important but not expected

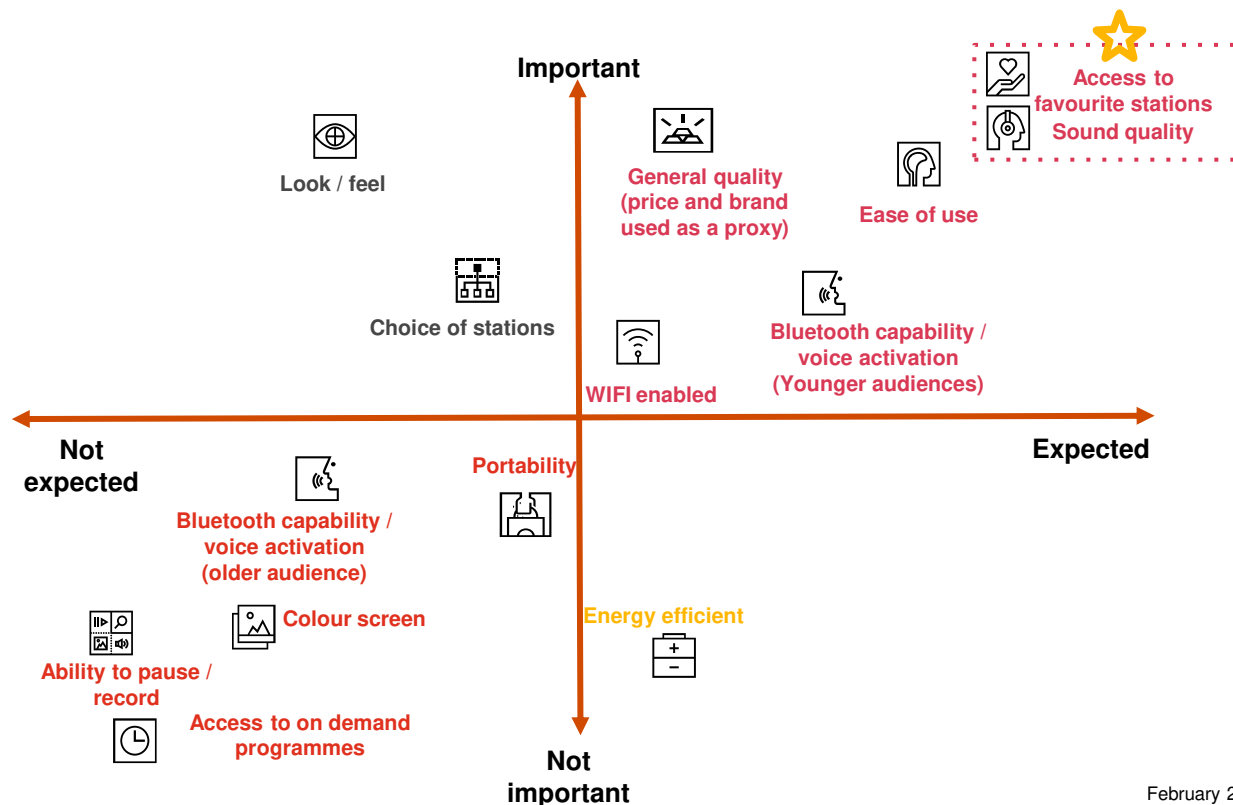
Help differentiate from other devices but not willing to pay more for

## Not important and expected

Assume it will be there so worth highlighting feature

## Not important and not expected

Not essential to focus on features as little consideration given



# Access to favourite stations, sound quality, DAB coverage and ease of use seen as core for radio devices to serve their purpose

## IMPORTANT FEATURES



### Access to favourite stations

- Purpose of listening to radio is to listen to favourite stations; deemed pointless without
- None spoken to listened to niche stations; no concern that favourite would not be available



### Sound quality

- Audio device so sound considered very important - waste of money if poor sound quality
- Expect digital stations to provide a crisp sound (not 'tinny') due to better signal
- AM / FM users expect it to be better than current device
- Prepared to pay extra to ensure good sound quality - at least mid range



### Ease of use

- **AM / FM users:** view DAB to be more complicated than AM / FM. Need reassurance that new device will be easy to use to motivate change
- **Younger audience:** Needs to balance being easy to use whilst offering multiple functionalities. As technology is advancing, believe devices should be getting easier to use, not harder

Need to shout about these features as essential - but also expected so unlikely to excite and motivate purchase

# General quality, look of the device and additional tech functions were seen as additional benefits worth looking for

## OTHER IMPORTANT FEATURES



### General quality

- Price and brand used as benchmark to determine quality when purchasing; poor quality perception barrier to purchase
- Mid range devices with a reputable tech brand are thought to represent 'good' quality to consumers



### Look and feel

- Important the device fits in with the rest of the house decor - would not want garish colours, or bulky devices
- Neutral colours preferred so it could be kept on display - seen as a feature
- Retro styles fit in with perception of radio and thought to look good on display at home



### WiFi enabled

- After hearing definition of a smart radio expect the device to be WiFi enabled
- Believe WiFi will allow extra capabilities to work on the device; appealing to younger audiences



### Bluetooth and voice activation (younger)

- Expect a smart radio to come with voice activation due to standards set by smart speaker.
- **Current DAB owners:** increase the feeling of upgrading from a DAB to a smart radio; motivation to purchase
- **Non current DAB owners:** voice activation appealing as it gives the device a multipurpose - however smart speaker more appealing

These features could potentially differentiate the device from others on the market - and for younger listeners, highlighting connectivity could make it more likely to be considered alongside a smart speaker

# Ability to record / pause, access to on demand and choice of all stations were not felt to be features that would be used

## LEAST IMPORTANT FEATURES



### Ability to record / pause

- None spoken to record radio - mostly listening in live.
- Not afraid of missing radio content like they would TV



### Access to on demand programmes

- High awareness that on demand programmes can be accessed elsewhere e.g. BBC Sounds, radio station app
- Those who currently access on demand would prefer to use their phone; more convenient
- Believe it would not be user friendly to search for on demand e.g. small screen, fiddling with dials



### Choice of all stations

- DAB stations considered enough for most; covers a range of stations / genres
- For those who may have a particular interest in a certain country / music access to global stations is appealing



### Bluetooth / voice activation (older audience)

- Voice activation: alien behaviour not something they currently make use of
- Bluetooth: do not know what they would use for

Listeners do not see these features as necessary for radio as it doesn't fit with current listening behaviours - would be unlikely to pay more to have this functionality - and for older listeners added features could be a turn off if it makes the device seem more difficult to use

# Energy efficient, colour screen and portability were features that were not commonly associated with radio devices

## OTHER UNIMPORTANT FEATURES



### Energy efficient

- Not a big appliance so do not associate big use of energy with radio
  - Expect radio manufacturers to already consider this and do their part to make it as energy efficient as possible
- 



### Colour screen

- Not seen as a feature or a necessity to have as you do not watch radio
  - More of a 'nice to have' but not prepared to pay more for
- 



### Portability

- Most expect to keep the device in one place - tend to have devices in other rooms or default to use phone
- Would only use in the house; would not use when out and about

These features had limited appeal and would not motivate listeners to purchase a radio device

# Brand is viewed as a good indicator of quality and reliability

- Top of mind brands when thinking about who would sell DABs / smart radios include: Phillips, Sony, Samsung, Roberts, Technics and Sonos
- Limited knowledge of DAB / radio specialists; especially among non radio device users - would be more likely to consider tech brands like Amazon or Apple, particularly for smart radios
- Low brand awareness not a barrier but further research required to learn more
- Brand loyalty not as strong for radio compared to other tech e.g. phones, TV

“Important to have a brand you recognise and acknowledge. But not overly important as I am not loyal to a certain brand when it comes to radio”

**Male, 24, DAB owner**

“If Apple put their name to something it is normally a winner”

**Male, 66, AM / FM owner**



# Expectation that smart radios will be more expensive than DAB as they are a newer device with more advanced technology

## 18 - 34 audience

**DAB**  
£20 - £50

**Smart radio**  
£50 - £100

Awareness of smart speaker prices guiding expectations for DAB



## 45+ audience

**DAB**  
£50 - £70

**Smart radio**  
£100 - £150

View smart radio as advanced technology - big difference between AM / FM

### Mid range

Preferable to ensure standard of quality and value for money

### Cheap

(below expected price range)  
Perceive device will not last long

### Expensive

(above expected price range)  
Not deemed value for money

"No more than £50 - £60. I know you can get DAB quite cheap now. I expect a SR to be more expensive as it is newer"

Female, 29, DAB owner

"I would expect a smart radio to be more than £120 if you can access stations from around the globe"

Female, 57, AM / FM owner

"Smart Radio I would pay between £50-£70 as I know it has more in it. DAB are a bit old school so I would not want to pay much as I know I can get a better product"

Male, 19, Non-DAB owner

Younger audiences perceive DAB as expensive as not seen to be as useful as other devices which offer multiple functions. Older audiences expect DAB and smart radio to be more expensive and are willing to pay as it is an upgrade from an AM / FM.



**05**

Purchase considerations and motivation

# Younger audiences would seek multi use devices whereas older traditional AM / FM listeners prefer radio only devices

|                           | DAB                                                                               | Smart Radio                                                                       | Smart Speaker                                                                       |
|---------------------------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 18 - 34<br>Non-DAB owners |  |  |  |
| 18-34<br>DAB owners       |  |  |  |
| 45 +<br>AM / FM listeners |  |  | Not in consideration set                                                            |

**Smart radio more appealing** than DAB for younger audiences as more modern but smart speaker top of mind for future purchases

**Older audiences more mixed in terms of preference**

- **DAB:** perceived as simpler, easier to use and more reliable
- **Smart Radio:** potentially more complicated but international stations sparked interest for some

# Younger non radio owners are more likely consider a smart speaker over a radio

## Perception of Smart Speakers



### Good sound quality

Better speakers than other commonly used devices e.g. phone / laptop



### Wide range of capabilities

e.g. voice activation, answer questions, control other smart devices in the home, play music etc



### Value for money

Price expectations for a standard smart speaker considered value for money (£20 - £50)



### Small and compact

Fit into the home more easily



### Highly recommended

Friends and family who own are selling the benefits

## Sound Quality

## Capabilities

## Price

## Size

## Recommendation

## Perception of Radio Devices

### Good Sound Quality

Better speakers than other commonly used devices e.g. phone / laptop



### Limited capabilities

Can only use for radio; appeal grows when told about additional functions e.g. connecting to Spotify

### Not value for money

Limited capabilities makes it seem expensive for what it is

### Bulky and large

Take up space however can look good as decor, especially retro styles

### Not recommended as often

Radio devices not spoken about as much as smart speakers

Radio devices face strong competition from smart speakers. Younger audiences are unlikely to consider a radio unless the smart features are sold to them

# Current radio owners would need a catalyst to encourage them to purchase a new DAB / Smart Radio

## 18-34 DAB owners

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Would potentially look to **upgrade** their device to a **smart radio** if their DAB broke but do not see it as a necessity to buy one otherwise

"I would look at getting a smart radio if my DAB broke but I don't think it is massively better otherwise I would go and get one now, it is not an urgent thing "

Male, 24, DAB owner

## 45 + AM / FM listeners

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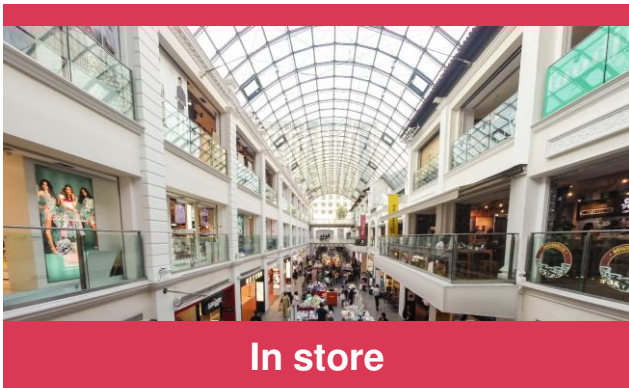
Happy with their current radio and would **only purchase a DAB / smart radio should they be required** to do so e.g. digital switchover, AM / FM device breaks, changing decor in house

"Why buy if I already have a radio that is working, I wouldn't actively look for one until the radio itself doesn't work"

Female, 46, AM / FM owner

Challenge for both manufacturers and retailers to encourage long-term purchasing. Highlighting additional features of the devices can help to promote the differentiators from their current device; especially amongst younger listeners who are interested in multi-functionality

# Most stated there would be a preference for omnichannel shopping for radio / audio devices



- Speak to a **tech expert**; important for those less tech savvy
- **Try before you buy**
- Assess the **quality** more easily
- See the look and feel, size, colour etc.

"I would go into a retail store as I don't know everything about tech so I would like to speak to someone to make sure I get the best option for what I need"

**Female, 33, Non- DAB owner**

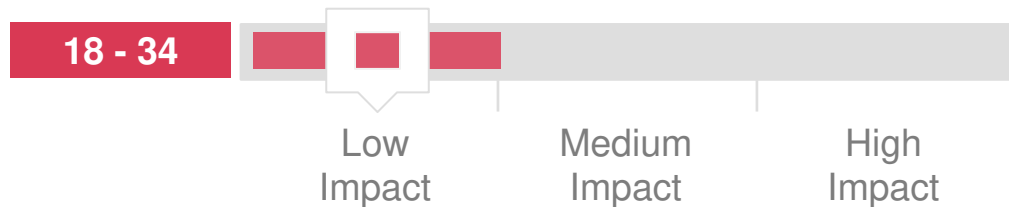


- **Conduct research** e.g. customer reviews, tech forums, TrustPilot
- Talk to expert on a **chat bot**; more used by those who are tech savvy
- **Price comparisons** to direct in-store shopping

"It would be nice to go into the shop and have a play but I do like to read the reviews online first"

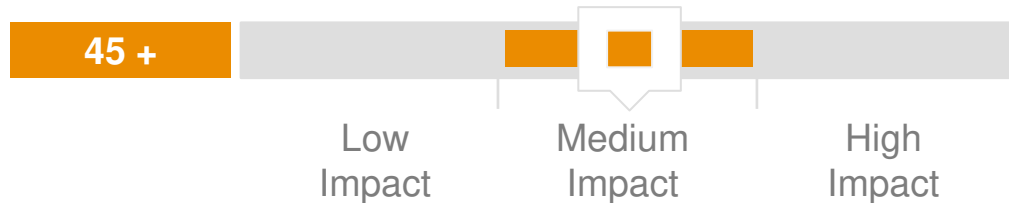
**Male, 28, DAB owner**

# All felt they would be willing and able to adapt in home listening if the analogue signal were to be switched off



**Already use other devices** that offer digital radio services e.g. phone, smart speaker, laptop

"If it switched over you would just have to deal with it like we all did with the TV"  
**Female, 30, Non- DAB owner**



Would **force to purchase a digital radio** device but not cause an upset - most happy to adapt

"It wouldn't really affect me. I would still be listening to the radio as I don't really listen to AM / FM stations anyway"  
**Female, 29, DAB owner**

If there was a digital switchover, **audiences radio listening behaviour would remain largely unchanged in home**. Younger audiences behaviour will be mostly unchanged as they are already using digitally enabled devices. AM / FM only listeners can be retained by helping to increase awareness and providing guidance through the purchase process.

"It would force me to buy a DAB radio. My AM / FM is reliable and it works, but it would drive me to a new radio if it was switched off"  
**Male, 55, AM / FM owner**



06

Conclusions

# Top takeaways

1

**Younger DAB owners are satisfied** with their devices but only use in the room of the house it is kept. Despite this, DAB is not perceived to be as useful as other devices which offer multiple functions. All also used other devices to listen to radio (e.g. phone, smart speaker, tv) if they were not in the same room as their DAB.

2

**AM / FM only listeners remain happy** with their radio provision, despite acknowledging they are newer and objectively better devices available; there is no desire to switch unless it is necessary to do so

3

With so many other device options it is **hard for younger audiences to see the relevance / need for a specific radio device**; not an embedded behaviour. **AM / FM** only listeners preferred to stick with the **familiarity of their AM / FM device** when at home, despite being aware of and owning other devices to use to listen to the radio

4

Spontaneous awareness of smart radios is low - but all thought **smart radio would be more expensive than DAB as it is seen as an upgrade / more modern**. Current younger DAB owners were interested in investigating smart radios further due to interest in having the latest technology and an established radio habit.

5

**Radio devices face strong competition from smart speakers**. Younger audiences are unlikely to consider a radio unless the smart features are sold to them

6

Current radio device owners **need a catalyst** to encourage them to purchase a DAB / Smart Radio making it a challenge for both manufacturers and retailers to encourage long term purchasing. Sound quality and access to favourite stations are key features when buying a new radio, but look and feel and choice of stations have the potential to differentiate.

7

If there were to be a digital switchover, in home AM / FM only listeners would be open to purchasing a new device to listen to the radio, but would benefit from more information about DAB and smart radio device options, as well as guidance through the purchase process

# Key implications

## Highlight smart features / benefits

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Current radio device owners **need a catalyst** to encourage a purchase consideration.

**Highlight the additional features** to motivate younger audiences to 'upgrade'.

**Focus on the benefits** (e.g. ease of use, better signal) to reduce worries of switching device for comfortable AM / FM users.

**Non radio device owners** unaware of the multifunctional capabilities that radio devices can provide; promoting could help increase appeal and reduce 'old fashioned' perceptions

## Increase awareness and understanding of smart radio vs. other devices

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**High appeal** across audiences when informed (especially amongst the younger DAB owners).

Need to **promote availability of the device** to increase chances of consideration.

**Greater education** needed to fully understand the functionality of a smart radio. Current understanding based on expectations of the word 'smart' e.g. voice activation

**Radio jingles** stated as one of the main ways other radio listening methods are picked up on - mentions of DAB and Smart Speakers heard in BBC and Global station jingles but no mention of smart radio.

## Promote the unique and distinct features of DAB / Smart Radio

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With some of the **younger listeners** questioning the need for a single use device, it is important to highlight the distinct features that radio devices offer over others to try and motivate them with a reason to purchase.

For **AM/FM listeners** promoting the unique features along with guidance on how to use will help make the move from AM/FM to digital more smooth whilst getting the most out of their new device.

## Importance of omnichannel shopping

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Preference to use **a mix of online and instore channels** to help them with their purchase decision - online for recommendations and instore to assess sound, quality and look and feel

**Creating a seamless experience** could include: making sure customer reviews are easily accessible on retailer websites and having devices on display in store

# Thank you

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Appendix

# In their own words....DAB

"Where there is a device that only has one use that you have to plug in it makes it feel old as most devices do multiple things these days"

**Female, 33, non-DAB owner**

"Myself, my parents and grandparents have a DAB but we have moved onto phones now so we no longer using them. They are up in the loft so I guess there are old news now"

**Male, 19, non-DAB owner**

"The alarm clock persuaded me to buy a DAB. I didn't go shopping for one deliberately but found that I could get an alarm clock and a radio together"

**Female, 34, DAB owner**

"I am currently looking into a DAB radio, they do an autoscan to find stations and can lock in your favourite ones"

**Female, 46, AM / FM listener**

"I use to have one when it was a new thing. I did not replace it as technology advanced so I could listen on the phone which is easier."

**Female, 33, Non- DAB owner**

"There is a lot more variety and the sound quality is much better with no interruption as it is digital"

**Female, 29, DAB owner**

"There is a part of me that is reluctant to getting a DAB radio set up, finding presets and everything. I anticipate that I need to set it up and it all becomes quite complicated"

**Female, 57, AM / FM listener**

" I know if I invest in one, it would pay for itself and would look nice in a shiny kitchen"

**Female, 45, AM / FM listener**

# In their own words....Smart Radio

"I just equate it with a smart speaker, if someone says Smart Radio I just think of Alexa"

**Male, 19, non-DAB owner**

"It appeals to me, makes it sound better than what I already have and I like to have the latest thing"

**Female, 34, DAB owner**

"Not an urgent thing to get but it is like having a mid range phone and upgrading to a high range phone. I see it more as an upgrade rather than an essential"

**Male, 24, DAB owner**

"If you are spending £70 on a radio, you don't want to replace it again... You probably need to spend a bit of time before investing in one"

**Female, 45, AM / FM listener**

"It sounds more modern and in with the times but I just don't think I would make use of a specific smart radio, I wouldn't use it any differently to my phone"

**Female, 33, non-DAB owner**

"If my DAB broke then I would maybe upgrade to something like this, but I would not upgrade without there being something wrong with my current DAB"

**Female, 29, DAB owner**

"Never heard it mentioned before. I'm curious about it, but wasn't aware it was available"

**Male, 72, AM / FM listener**

I am aware you can listen through smart devices, Alexa's that sort of setup... My daughter would probably want one"

**Female, 46, AM / FM listener**

# Important features in their own words...

## Access to favourite stations



"If the device didn't have my favourite stations then what would be the point of buying it?"

**Male, 24, DAB owner**

## Sound Quality



"I would pay a bit extra for better sound but it should have decent sound anyway as it is sole purpose is to sound good for playing music"

**Female, 34, DAB owner**

## Ease of use



"It should be straightforward and picking the stations should be easy to do"

**Female, 57, AM / FM owner**

"I don't really need anymore stations. As long as it has the ones I listen to then that is fine. I haven't got the patience to search through all the others"

**Male, 66, AM / FM owner**

"I want to listen to something with a nice sound. If it sounds all 'tinny' may as well just listen on your phone"

**Female, 29, DAB owner**

"It needs to be able to have a lot of functionality but not making it too complicated. Sometimes companies want to put too many features on so it is about getting the balance right"

**Male, 19, non -DAB owner**

# Other important features in their own words...

## General Quality



"If it was too cheap then I would be suspicious of the quality"

**Male, 72, AM / FM owner**

## Look and feel



"If it is going to be on show in my home I would want it to be on trend with everything else I have out. I wouldn't want it to be too wacky and out there."

**Female, 30, Non- DAB owner**

## WiFi enabled



"Presumably that is why it is called a smart radio? If the WiFi is not working you might as well get another device"

**Male, 66, AM / FM owner**

## Bluetooth / voice



"I wouldn't look for voice activation as I would expect a smart radio to have it just like a smart speaker"

**Female, 29, DAB owner**

"I would not go too cheap as I would be worried that I would not be getting a good quality device - then that would be a waste of money"

**Male, 19, Non- DAB owner**

"If it is something that is going to be out you don't want it to look rubbish. The one I have is bright red which is probably the reason why it doesn't come out of the cupboard"

**Male, 28, DAB owner**

"If it connects to WiFi I expect it to provide a more reliable service. You don't want it to be cutting in and out. It can be an annoyance. Smart radio appeals more as it connects to WiFi."

**Male, 24, DAB owner**

"When I first heard smart radio I assumed it would be voice activated because of smart speakers. I would be disappointed if it wasn't as it wouldn't seem that different to my DAB and not worth the extra money"

**Female, 34, DAB owner**

# Least important features in their own words...

## Ability to record / pause



"I have not recorded a radio station since I was a kid. If I did want to go back and listen to a past show then I would just go on BBC iplayer / app and assume they would be on there"

**Female, 29, DAB owner**

"I don't record radio and play it back. If I wanted to listen to a certain song or podcast I would just stream it"

**Female, 34, DAB owner**

## Access to on demand



"I would still choose my phone as when I re-listen to something I am normally walking about which I could not do with a DAB "

**Male, 19, Non- DAB owner**

"If I wanted to listen back I would just do it on my phone"

**Female, 29, DAB owner**

## Choice of stations



"It is not that important to have access to every station. I listen to my few favourites rather than flicking through them all. It should just have a good range rather than every single one"

**Female, 34, DAB owner**

"Stations from other countries is an amazing thing, that is appealing. If you are into country music you may want to listen to a station in Nashville"

**Female, 57, AM / FM owner**

## Bluetooth / voice



" I am thinking is it a generational thing, we don't want any more tech. We are so fast paced in life, the beauty of AM / FM is you just go on and know where you are"

**Female, 57, AM / FM owner**

"The more technology, the more you have to learn how to use it"

**Male, 72, AM / FM owner**

# Other unimportant features in their own words...

## Energy efficient



"It would not cross my mind that I need to have a energy efficient radio, I didn't think there would be that much energy in it"

**Female, 34, DAB owner**

"I can't see it using that much energy compared to other things in the house. I associate looking at this sort of thing more for light bulbs "

**Male, 24, DAB owner**

## Colour screen



"I thought it was a trick question, you don't watch the radio!"

**Male, 55, AM / FM owner**

"I would not pay lots more for a colour screen. I think a smart speaker with a screen would be a better option as there is more you can do with them"

**Male, 19, Non- DAB owner**

## Portability



"Apart from moving around your house, how practical would it be to carry a DAB around. It would be a very small factor for me"

**Female, 30, Non- DAB owner**

"It is not too important as when you buy something like that it will stay where it is plugged in. It is a bit of a faff to move around"

**Male, 19, Non -DAB owner**

# In their own words...smart speakers

"I am considering a smart speaker as family / friends have them. They are easy to use as you just have to speak to them. As we are getting lazier technology keeps getting better "

**Female, 33, Non- DAB owner**

"I am considering a smart speaker as friends have recommended to me. It would make me listen to more radio in the background with one "

**Female, 30, Non- DAB owner**

"I use my smart speaker more than my DAB. It is just easier to use and can do a lot more things "

**Male, 24, DAB owner**

