

Regional Sales

Regional Market Share

London remains key to UK album sales, but share is slipping

London is by some distance the most important regional market for sales of recorded music in the UK, but the share of sales it accounts for has fallen in recent years.

For the 12 months ended July 2008, London accounted for 21.9% of all UK album sales, yet this represents a large drop from a few years ago. In 2000 for example, London accounted for 28.1% of all albums sold.

The increase in Supermarket and online sales has played a large part in redistributing national sales as music purchasing has become easier for those consumers who previously may not have had convenient access to local music retailers.

Additionally, there has been a large reduction in independent stores throughout the UK, but this is especially true in central London.

Losses largest in London & Lancashire

Since 2005, album sales in the UK which can be assigned to a TV region have fallen by 20.8%. Of the 13 UK TV regions, only three have recorded losses greater than the market average. Unfortunately this has occurred in three of the four largest regions - London, Midlands and Lancashire.

Conversely, the three smallest regions (which have fewer large urban areas of population) have recorded the smallest sales losses over the course of the four years presented here. Ulster's sales fell by only 5%, Border's by less than 12% and Grampian's (Northern Scotland) rather more steeply, by 16.9%.

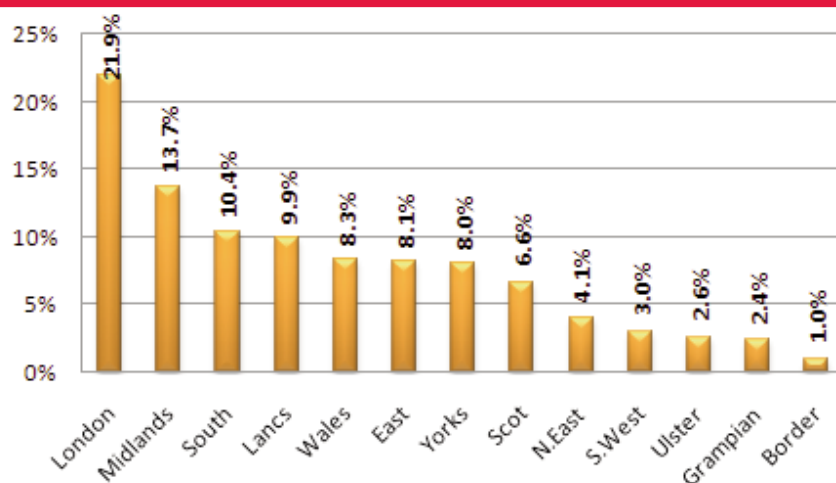
Format Sales by Region

The table to the right shows how London is ahead of most other regions when it comes to digital music. In both the digital albums and tracks market, the region's share is well ahead of its 'all album' total.

Other areas with higher than average digital shares are the South, East, Grampian and Border, all of which have high levels of non-urban population.

London's position in the vinyl LP market is even stronger - almost 37% of sales are made in the capital.

Album Sales by TV Region (12m ended July 2008)



Album Sales by TV Region - 12m ended July (units m)

REGION	2005	2006	2007	2008	% 05-08
London	37.037	34.735	31.893	28.167	-23.9%
Midlands	22.578	21.356	19.808	17.616	-22.0%
South	16.692	16.557	15.017	13.387	-19.8%
Lancashire	16.715	15.865	14.646	12.782	-23.5%
Wales & West	13.224	12.937	11.803	10.660	-19.4%
East	12.974	12.608	11.608	10.463	-19.4%
Yorkshire	12.787	12.259	11.433	10.346	-19.1%
Central Scotland	10.640	10.106	9.502	8.549	-19.7%
North East	6.452	6.192	5.813	5.228	-19.0%
South West	4.809	4.646	4.375	3.870	-19.5%
Ulster	3.505	3.363	3.591	3.332	-5.0%
Grampian	3.747	3.606	3.463	3.115	-16.9%
Border	1.481	1.441	1.385	1.305	-11.9%
Total	162.642	155.672	144.339	128.817	-20.8%

* Note that totals do not match with those published on page three, due to a number of digital albums which cannot not be assigned regionally

Regional Share of Sales by Format - 12m ended July

REGION	All Albums	LP	Digital Albums	Single Tracks
London	21.9%	36.8%	28.5%	27.8%
Midlands	13.7%	9.7%	12.2%	12.5%
South	10.4%	6.8%	12.6%	12.4%
Lancashire	9.9%	8.4%	7.4%	7.4%
Wales & West	8.3%	10.0%	7.5%	7.6%
East	8.1%	4.9%	9.1%	9.3%
Yorkshire	8.0%	8.4%	5.8%	5.7%
Central Scotland	6.6%	7.4%	4.6%	4.6%
North East	4.1%	3.2%	3.5%	3.6%
South West	3.0%	1.0%	3.0%	3.0%
Ulster	2.6%	1.6%	1.9%	2.2%
Grampian	2.4%	1.5%	2.8%	2.8%
Border	1.0%	0.3%	1.1%	1.1%
Total	100%	100%	100%	100%

All data on this page - Source: OCC