



EBU

OPERATING EUROVISION AND EURORADIO

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MARKET INSIGHTS

DIGITAL RADIO 2020

MEDIA INTELLIGENCE SERVICE
FEBRUARY 2020

ABOUT THIS REPORT

This is the fifth edition of the yearly report that the Media Intelligence Service of the EBU publishes to support the efforts of the EBU, its Members and part of the radio industry to transition from analogue terrestrial to digital terrestrial radio.

Built upon the experience of the [Digital Radio Toolkit](#), which examined the key success factors for radio digitization, Digital Radio 2020 highlights the state of the art of digital radio by monitoring five key indicators in EBU Members' markets (the EBU Area).

By doing this, the EBU helps radio industry stakeholders plan their digital radio strategies and supports their advocacy initiatives. Ultimately, it supports their efforts to bring terrestrial digital radio to their territories.

More information about the EBU digital radio activities can be found at <https://tech.ebu.ch/groups/radio>.

METHODOLOGY

All the data provided in this report refer to January 2020 and come from an analysis commissioned to an academic expert.

For the purposes of this report, digital radio is taken to mean broadcast radio using the DAB or DAB+ standards.

The analysis covers the 31 markets and 30 countries where digital radio services are available. Belgium has two separate markets, the French and the Flemish communities, which are autonomous in language, regulation and players involved.

A station categorized as exclusive means that its signal is not available on analogue in that same market.

The analysis is national, meaning that a local or regional station launching in a new area might constitute a new offer in that area, but it is not counted as exclusive for that national market. Similarly, stations with different licences in different local or regional areas have only been counted once.

National figures have been used in aggregating data for the EBU Area. So, some overlap may exist with regard to stations that are available in more than one country (e.g. relays of German-speaking stations in the Trentino-Alto Adige region of Italy or British stations in Malta).

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DIGITAL RADIO HIGHLIGHTS

Across the EBU Area, digital radio accelerated its expansion in the last year by growing the number of stations by more than 8% to 1,697.

OWNERSHIP

Two-thirds of digital stations are commercial services, growing 12% since 2018.

Although Other services represent 10% of the total, they have increased their presence by 45% in just two years.

COVERAGE

Two-thirds of digital stations target regional and local areas, with the regional offer growing by 35% in just two years.

Commercial offer dominates in the three coverage areas, but Others services has a strong presence in the local coverage, due to the commitment of some countries for the small-scale DAB (namely France, Germany, Norway, Switzerland, and notably the United Kingdom).

STANDARDS

More than 80% of digital stations use DAB+ while DAB-only is stagnated,

EXCLUSIVITY

One-third of digital stations are exclusive services.

In two years, exclusive services have grown by 15%.

Most new services are local but, proportionally, nationwide stations offer more exclusive services.

GENRES

Multiplication of stations through digital radio has multiplied the offer of music services, the main additional to analogue offer in number of stations.

Music remains the main genre (63% of the total) for almost the 80% of commercial stations.

Generalist stations offering a varied mix of genres are the main category of stations for public broadcasters.

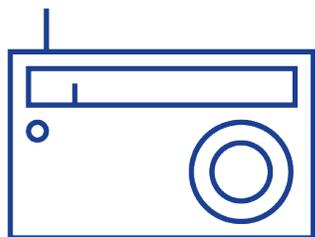
DIGITAL RADIO STATIONS

1697 STATIONS

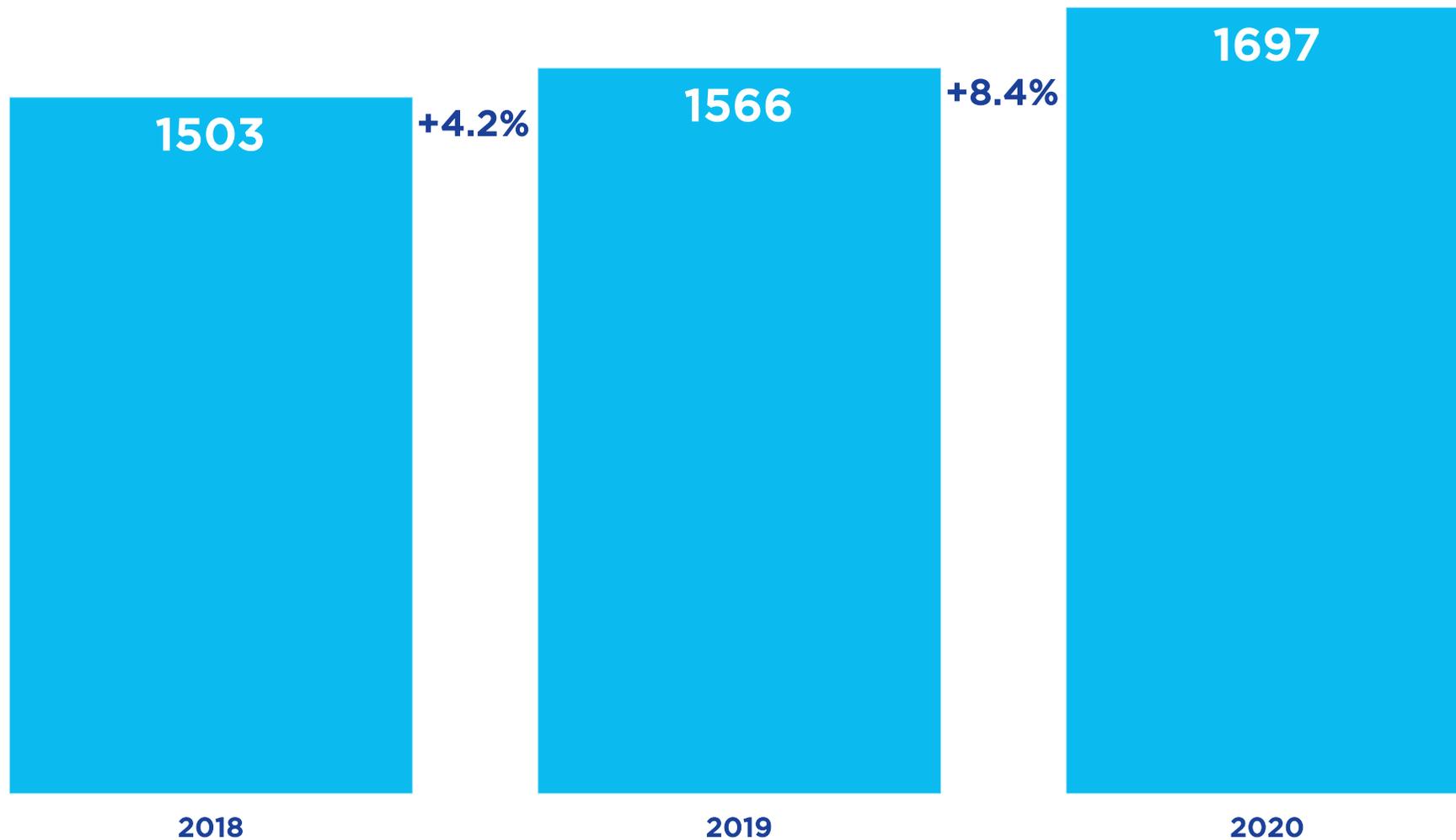
BROADCAST IN DIGITAL
TERRESTRIAL RADIO ACROSS

31 MARKETS

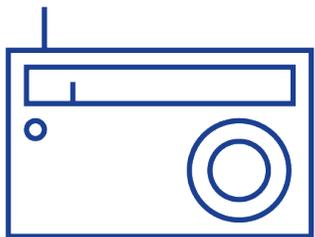
IN THE EBU AREA



DIGITAL RADIO STATIONS EVOLUTION



DIGITAL RADIO STATIONS BREAKDOWN



1697 DIGITAL STATIONS



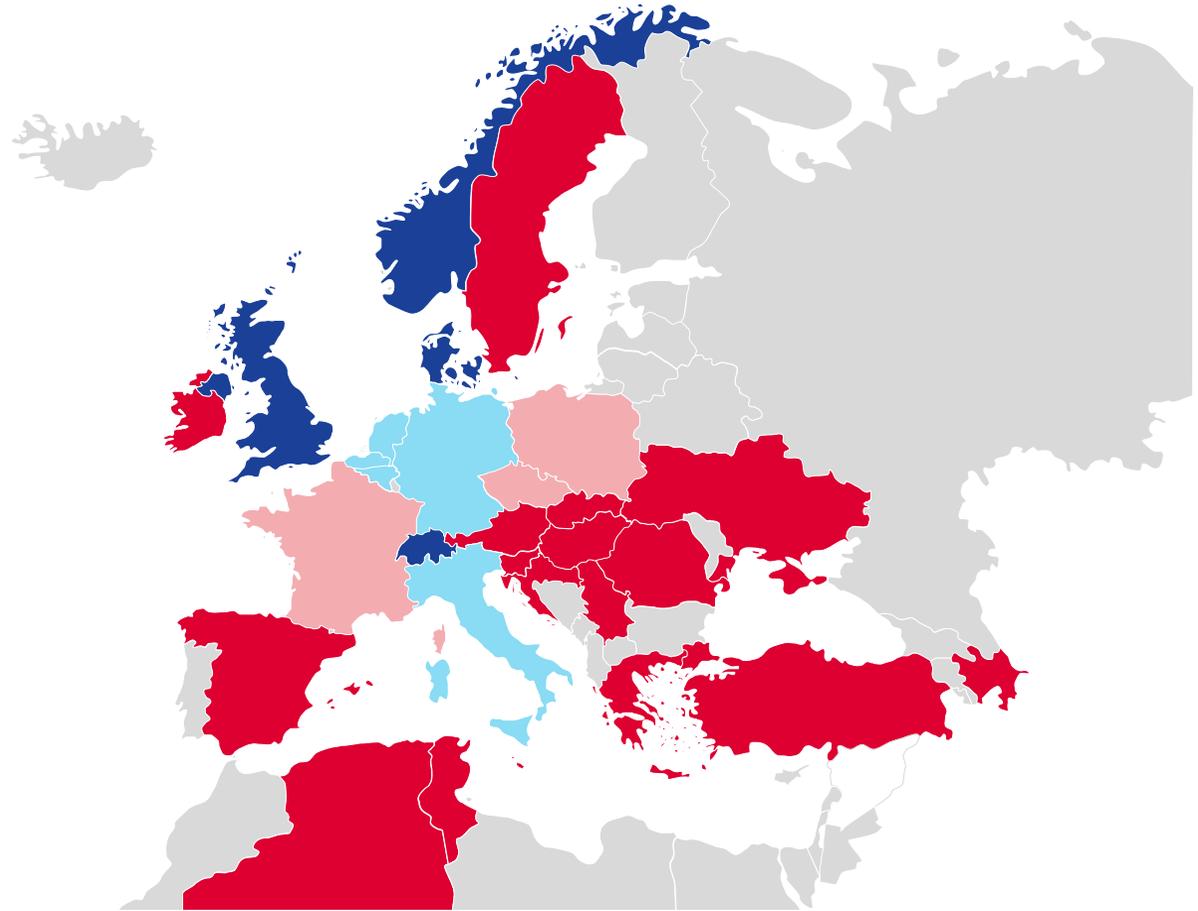
DIGITAL RADIO ROLL-OUT MAP

Digital leaders are the countries at the forefront of digital radio according to most indicators, including extensive coverage, expanded offer of new services, advanced legislation and regulation, including criteria and sometimes even dates for the switchover.

Digital embracers are those countries where DAB+ has been launched nationally, with exclusive services (different from analogue broadcasting). Receivers are on the market, promotion campaigns are being run and penetration is growing (at various rates).

Digital newbies are those countries that have recently launched DAB+ services, with exclusive stations but limited coverage (specific cities or regions) and limited or no commitment from some key stakeholders.

Wait-and-see describes those countries where regular digital radio services or trials are available but there is nearly no market because of a lack of receivers and, generally, a lack of commitment from the various stakeholders. Often this is related to a recent launch of services.



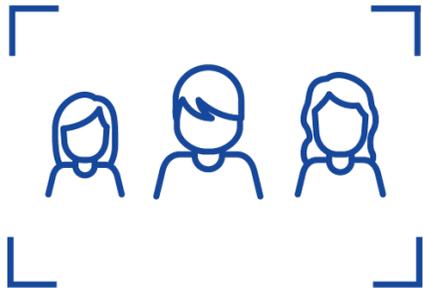
DIGITAL RADIO OWNERSHIP

TWO-THIRDS

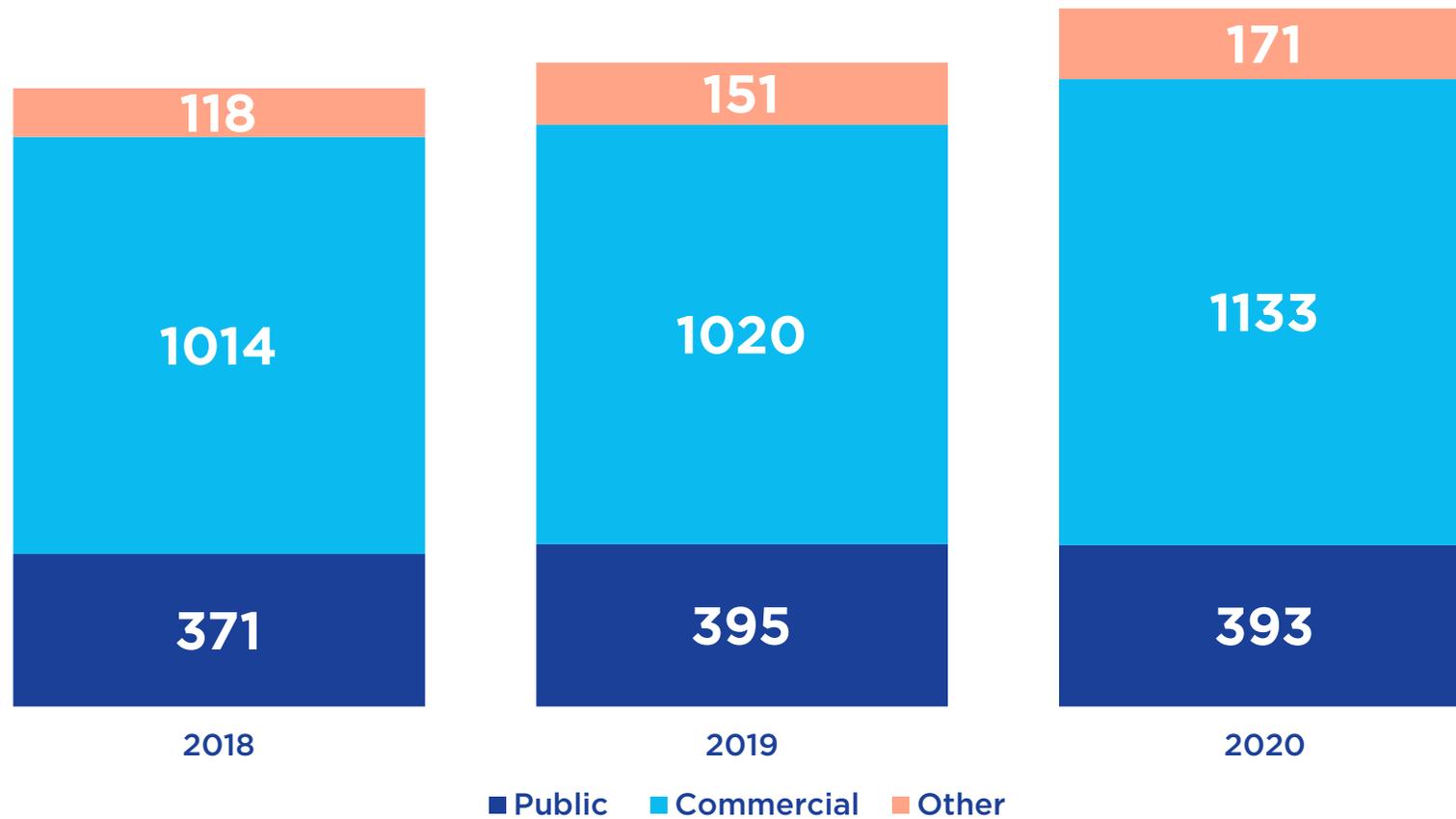
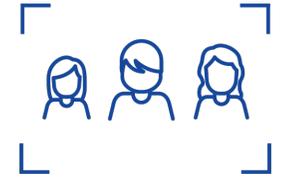
OF DIGITAL STATIONS ARE

COMMERCIAL SERVICES,

WHILE PUBLIC STATIONS REPRESENT
ALMOST ONE QUARTER OF THE OFFER

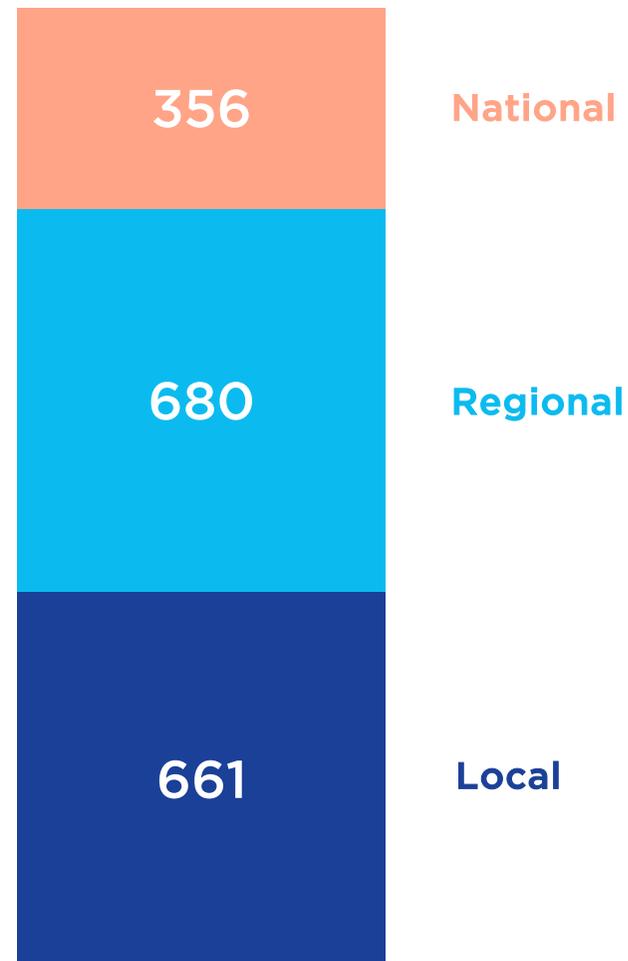


DIGITAL RADIO OWNERSHIP EVOLUTION

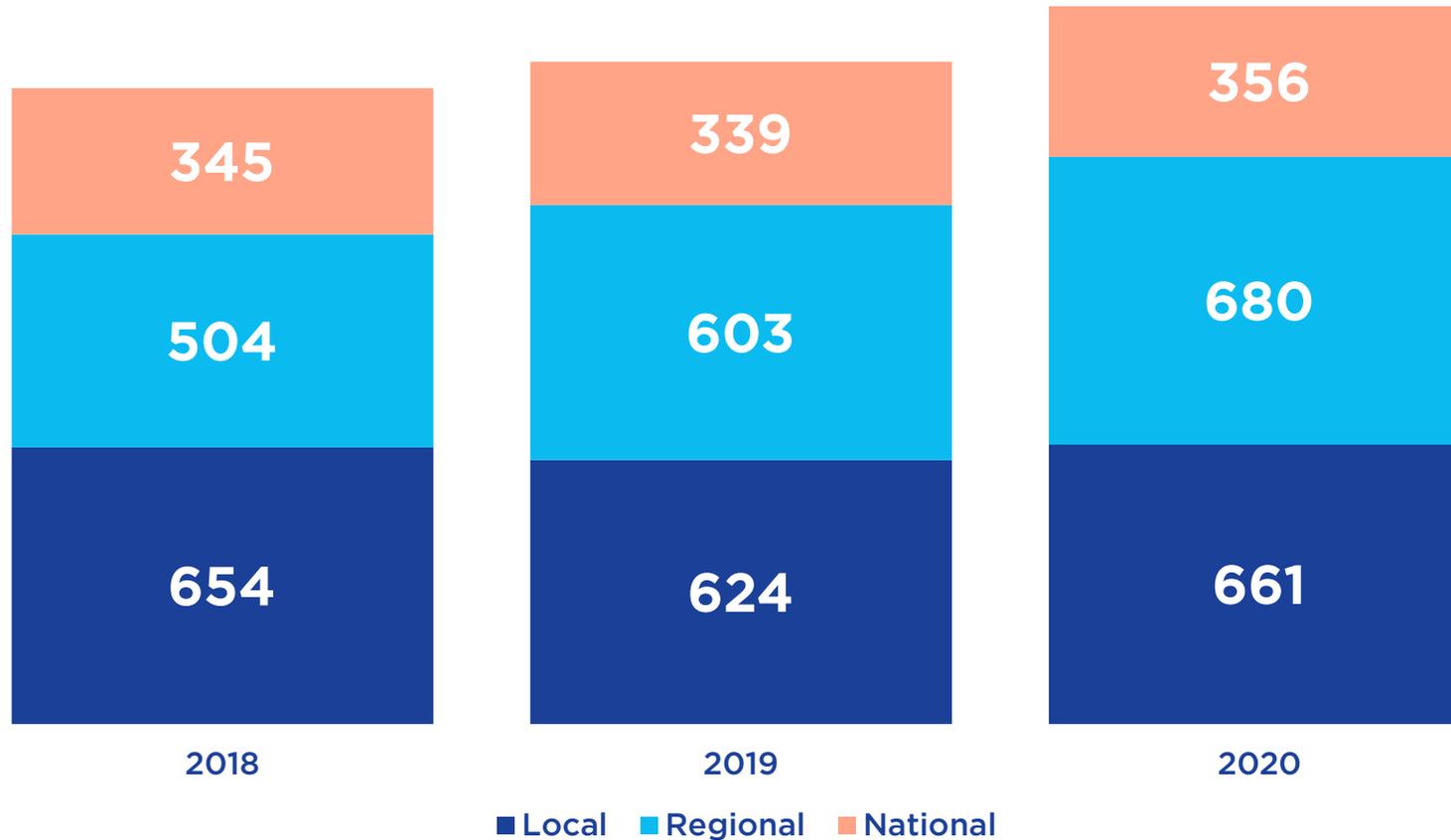


DIGITAL RADIO COVERAGE

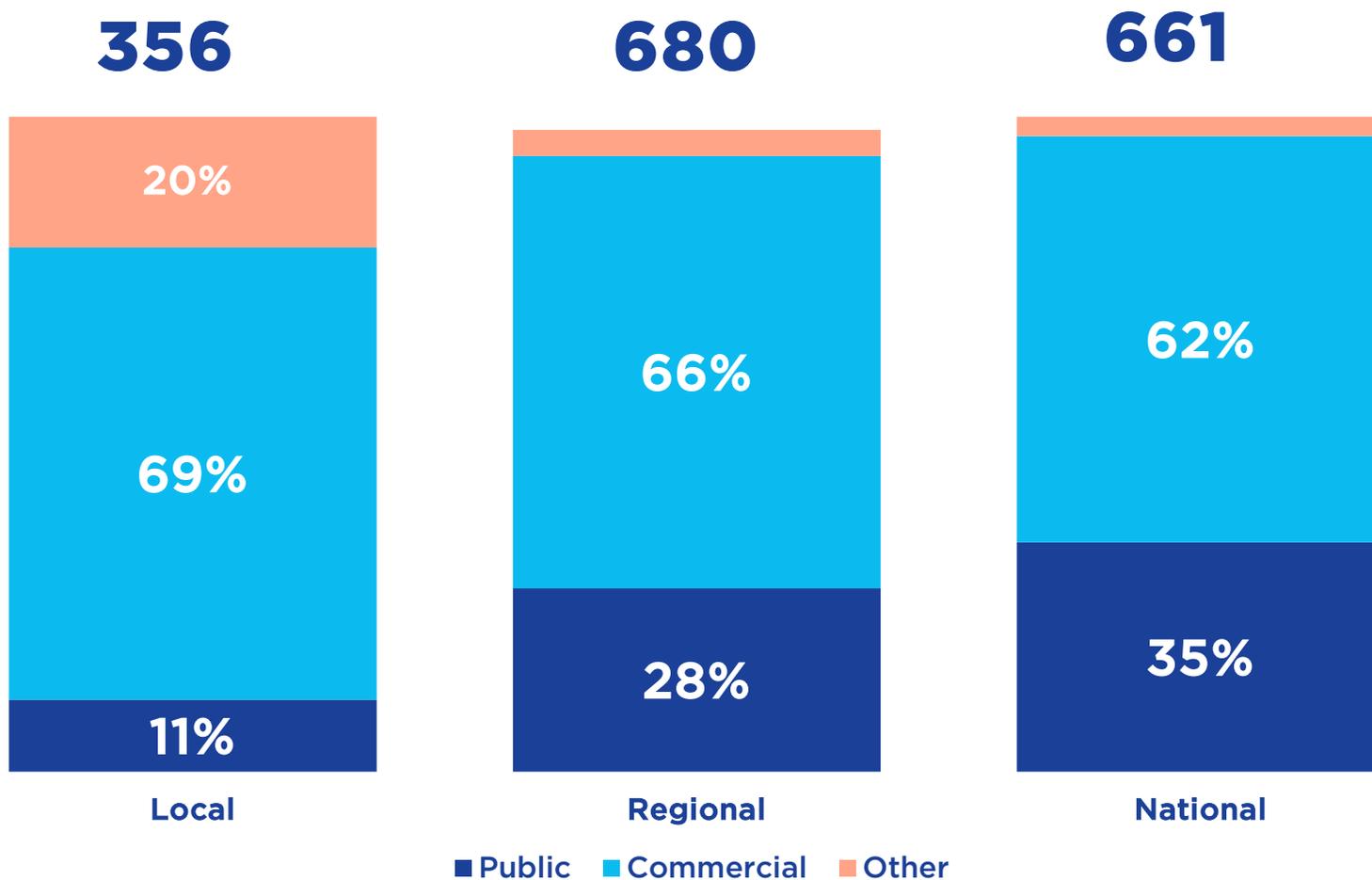
80% OF
DIGITAL STATIONS TARGET
**REGIONAL AND
LOCAL AREAS**



DIGITAL RADIO COVERAGE EVOLUTION



DIGITAL RADIO COVERAGE BY OWNERSHIP



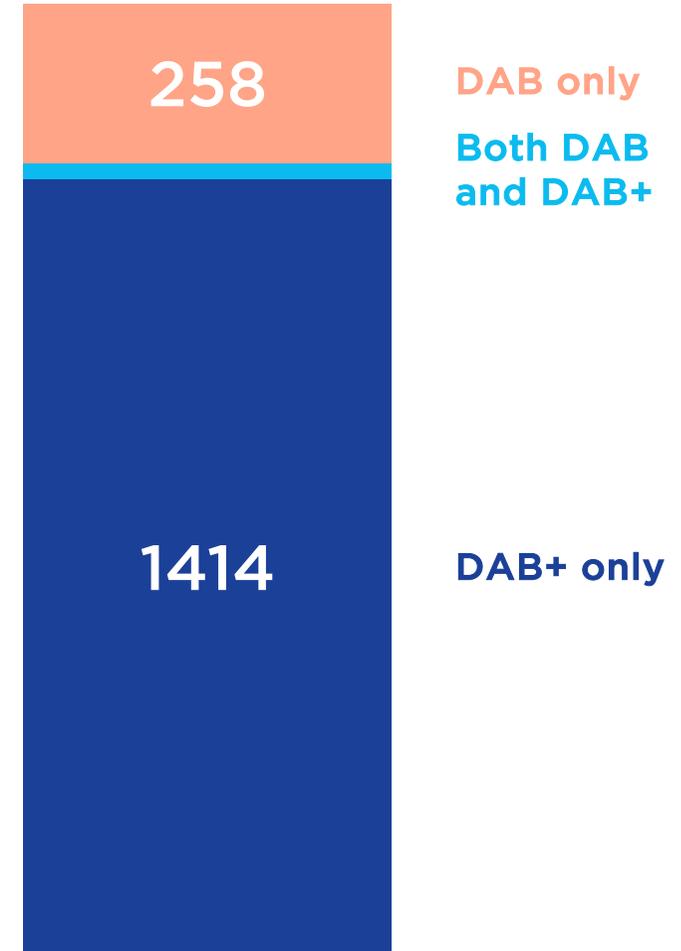
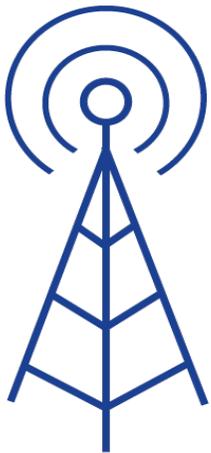
DIGITAL RADIO STANDARDS

MORE THAN 80%

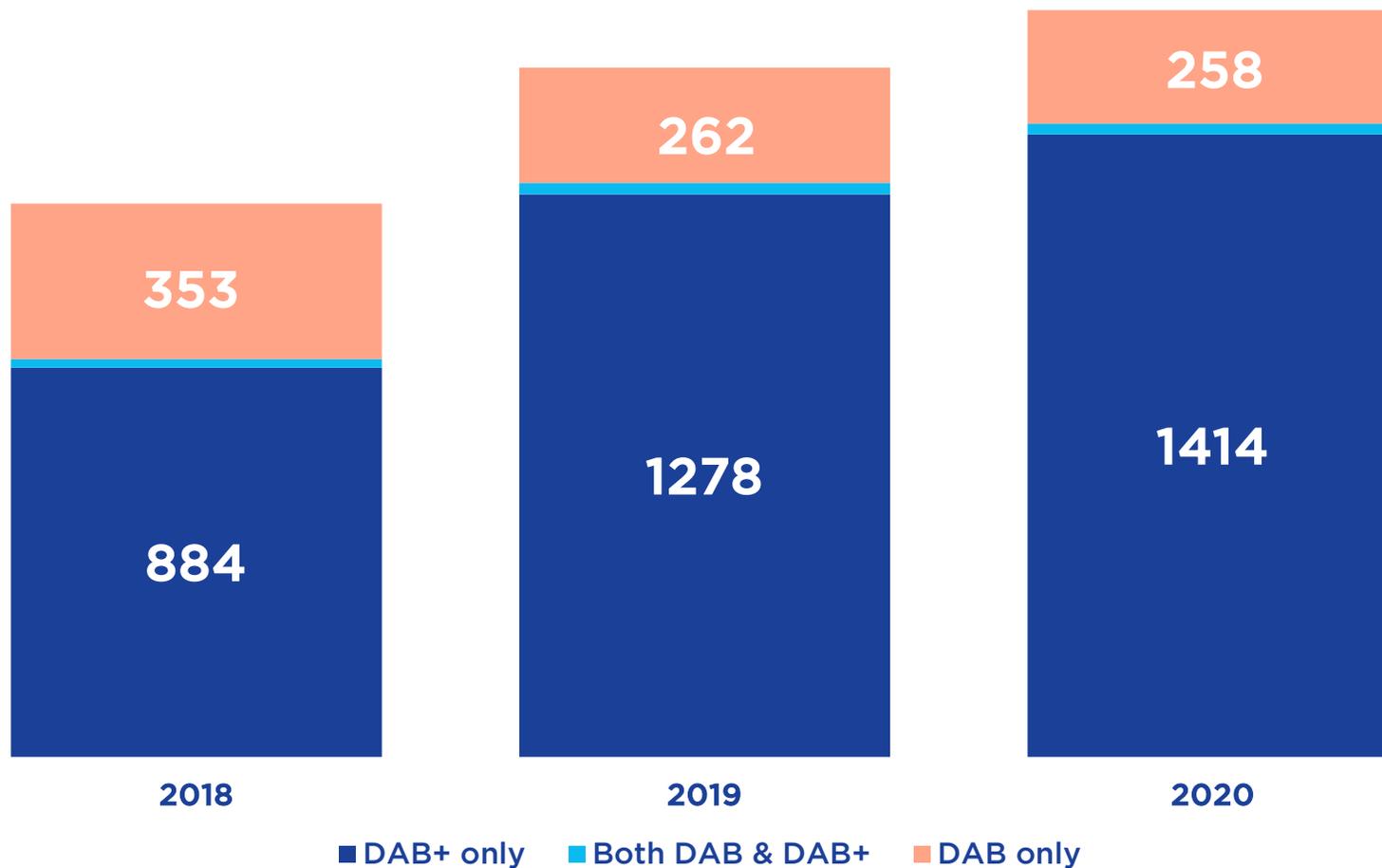
OF DIGITAL STATIONS

USE DAB+

WHILE THE DAB STANDARD
CONTINUES TO BE PHASED OUT



DIGITAL RADIO STANDARD EVOLUTION



DIGITAL RADIO STANDARDS PER MARKET

DAB PROGRESSIVELY PHASED OUT

DAB+ only offer grew 11% in January 2020 compared with the previous year.

Standing out amidst this growing trend, France increased its DAB+ only offer by 36%, Italy by 23%, and Poland by 19%.

Although the original DAB standard is phasing out, the UK is the most challenging case, as it is home to 83% of European DAB stations, and to 92% of the digital offer delivered simultaneously through both DAB and DAB+ standards.

DIGITAL RADIO STATIONS BY STANDARD



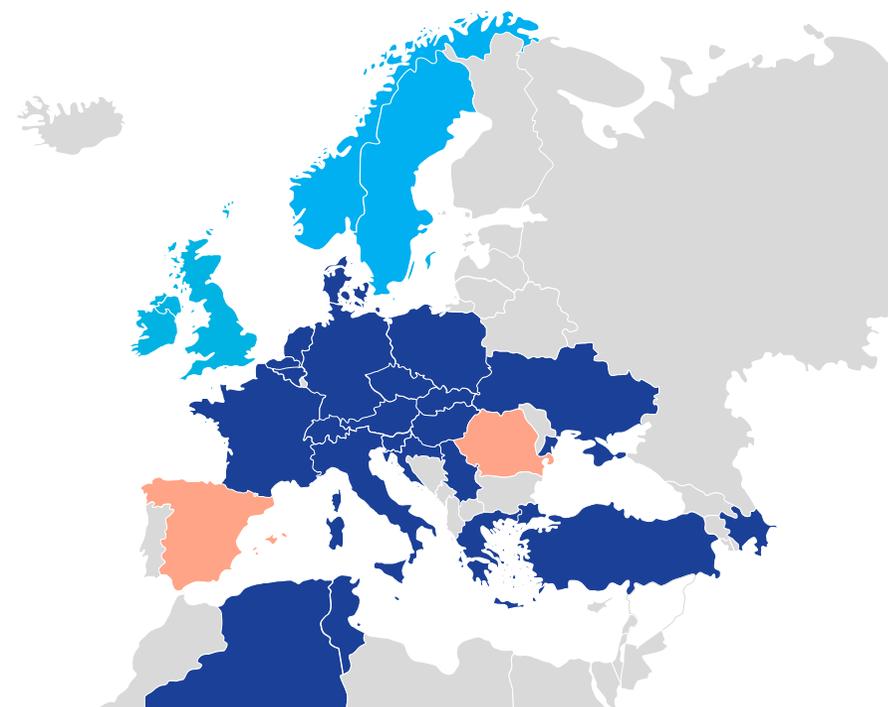
■ DAB+ only

■ Both DAB and DAB+

■ DAB only

■ No DAB(+)

DIGITAL RADIO STANDARDS BY COUNTRY



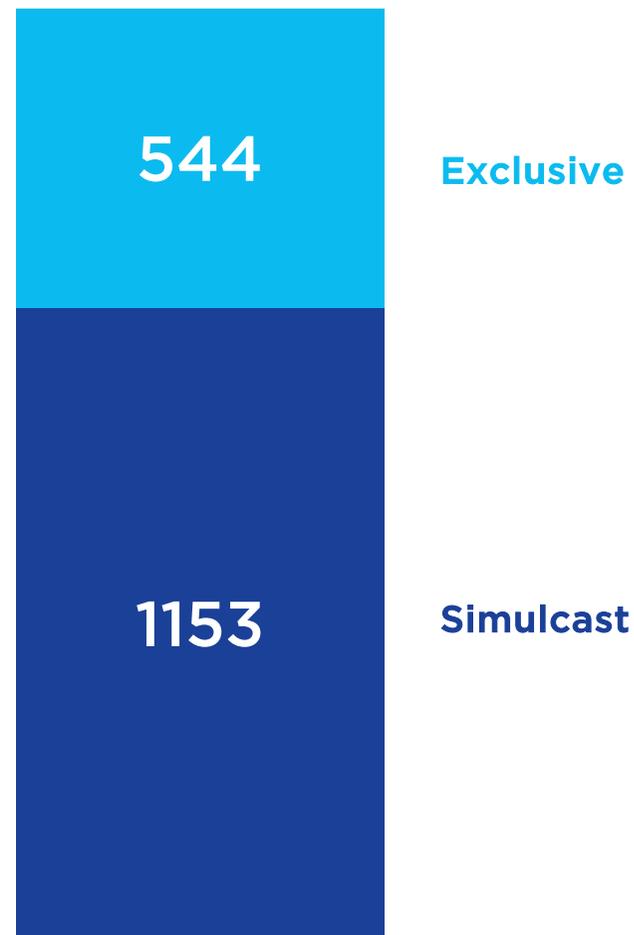
DIGITAL RADIO EXCLUSIVITY

ONE THIRD

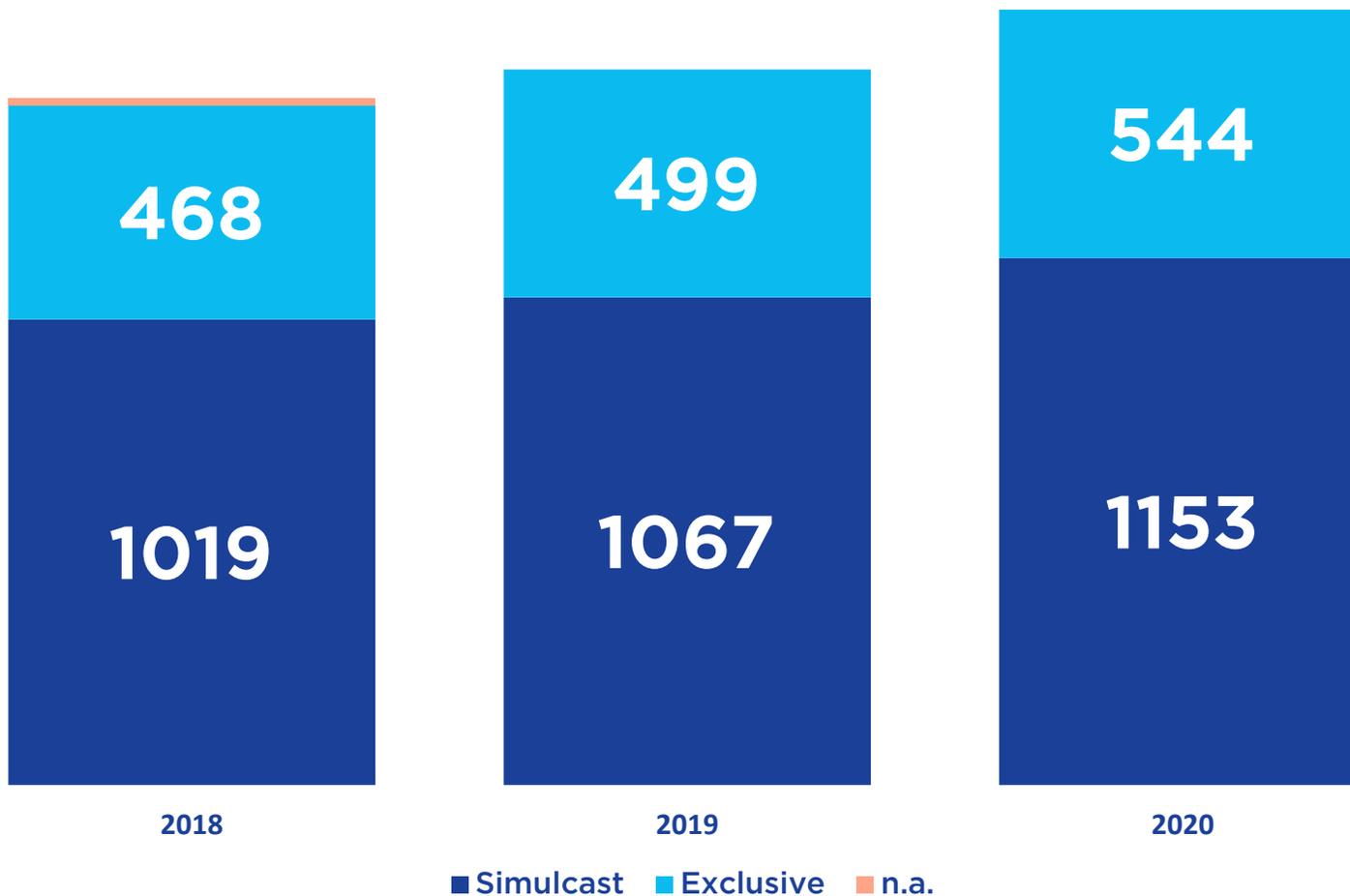
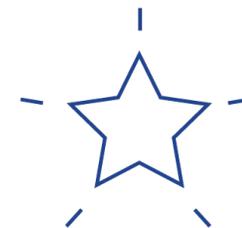
OF DIGITAL STATIONS ARE

EXCLUSIVE

SERVICES, ADDING VALUE
TO THE ANALOGUE OFFER



DIGITAL RADIO EXCLUSIVITY EVOLUTION

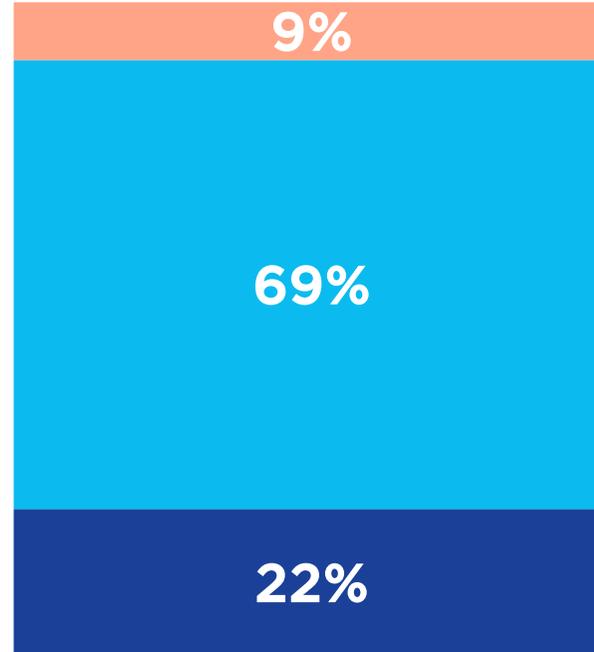
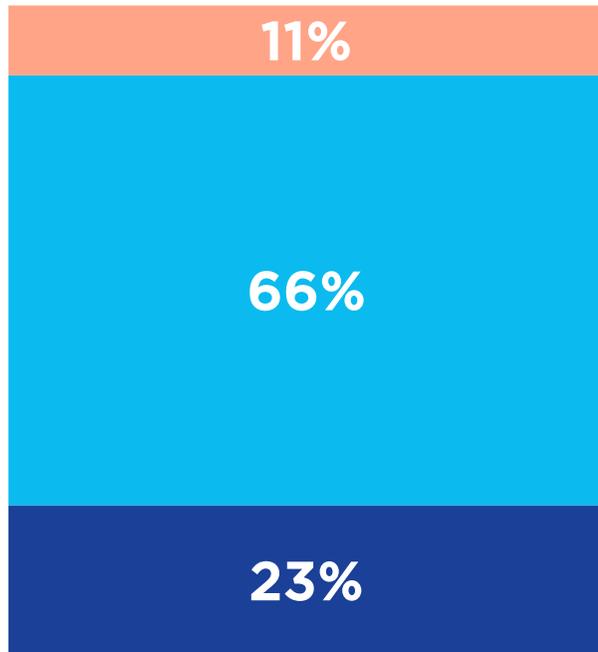


DIGITAL RADIO EXCLUSIVITY BY OWNERSHIP



1153

544

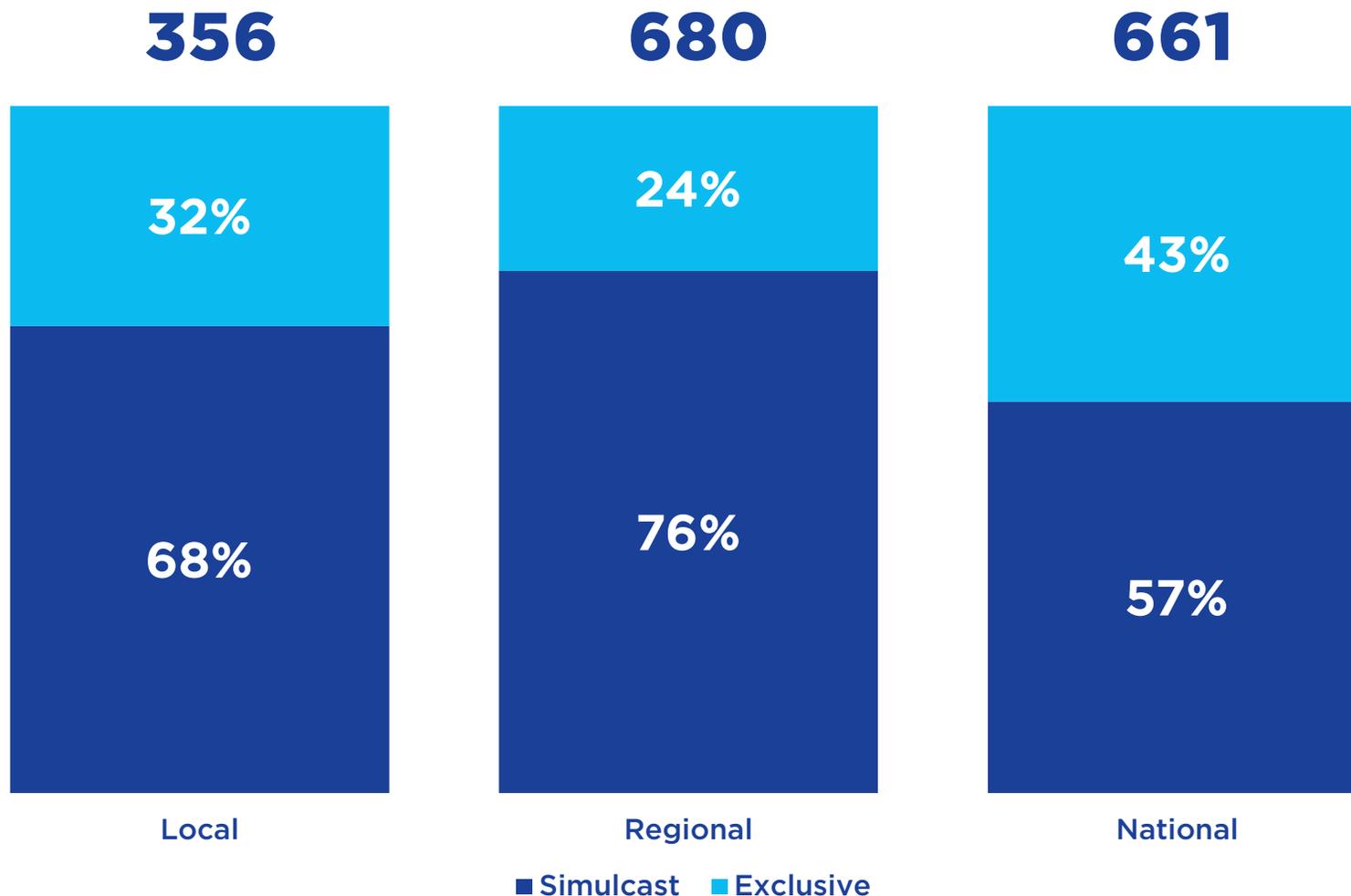


Simulcast

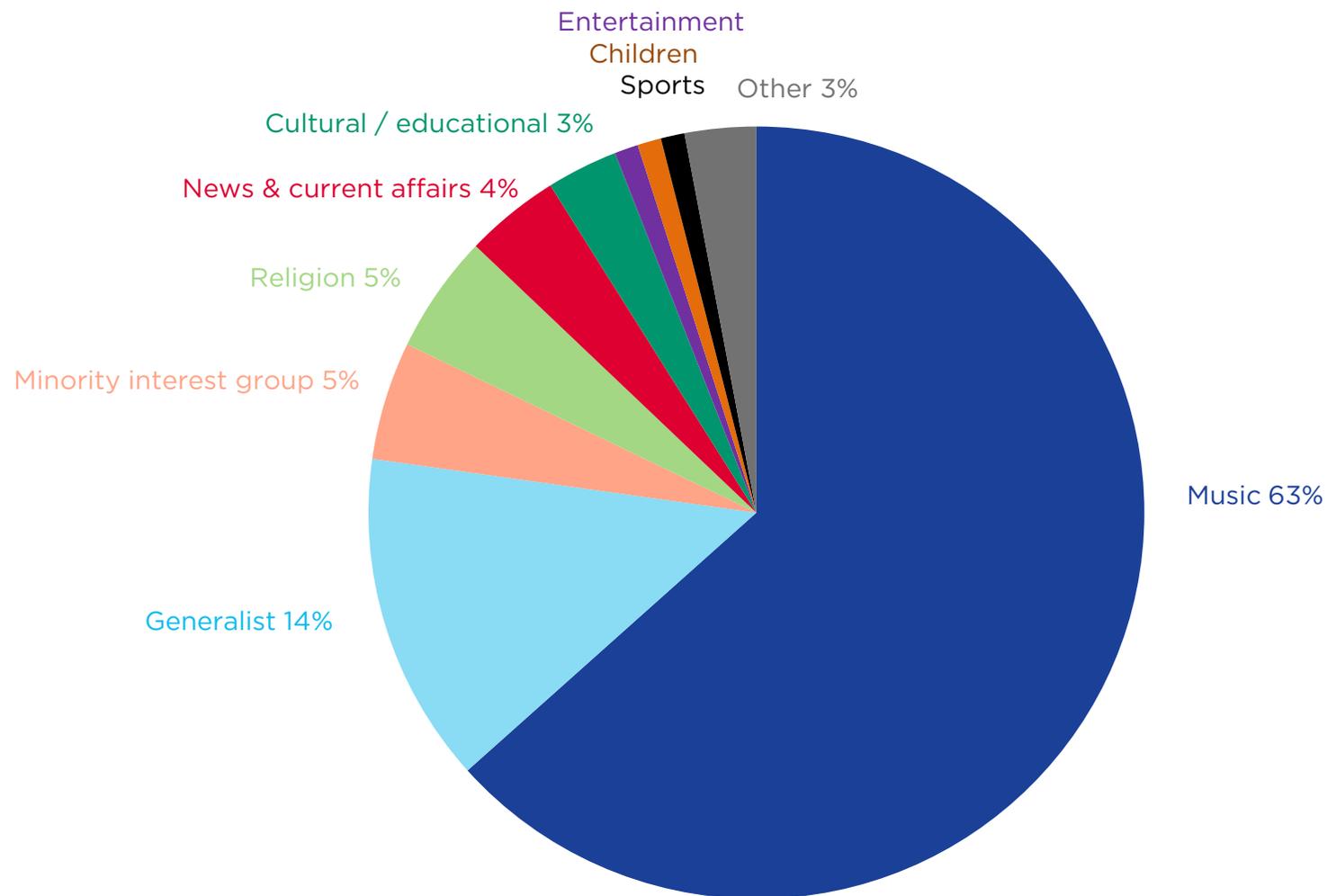
Exclusive

■ Public ■ Commercial ■ Other

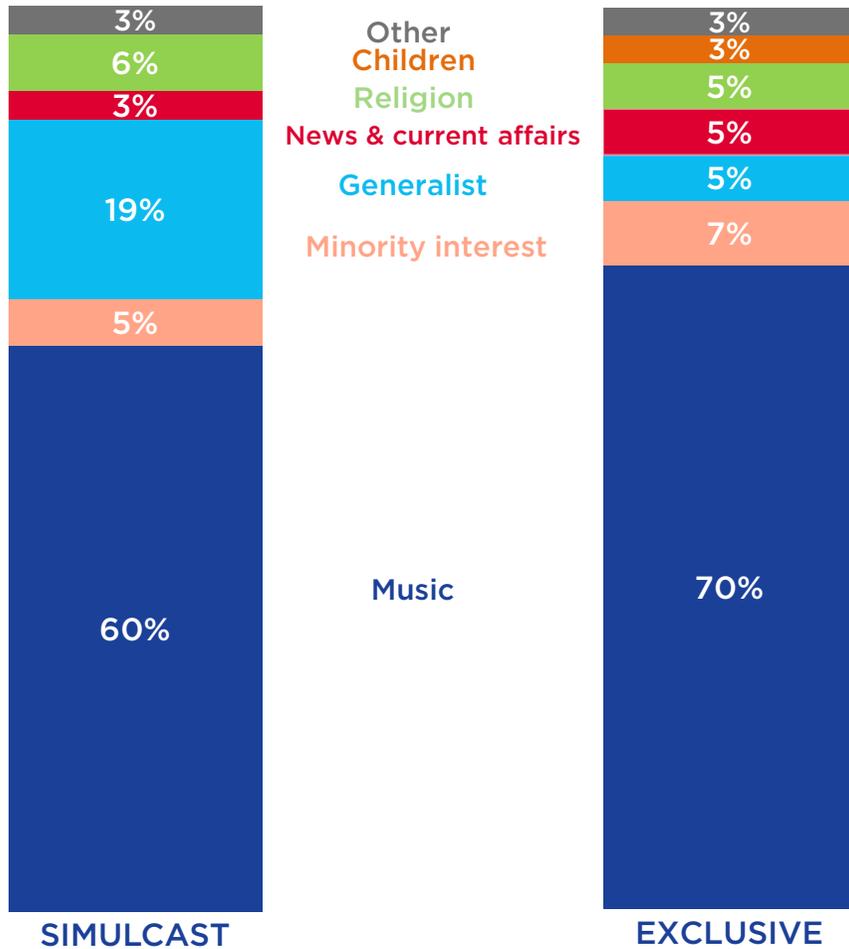
DIGITAL RADIO COVERAGE BY EXCLUSIVITY



DIGITAL RADIO GENRES - ALL STATIONS



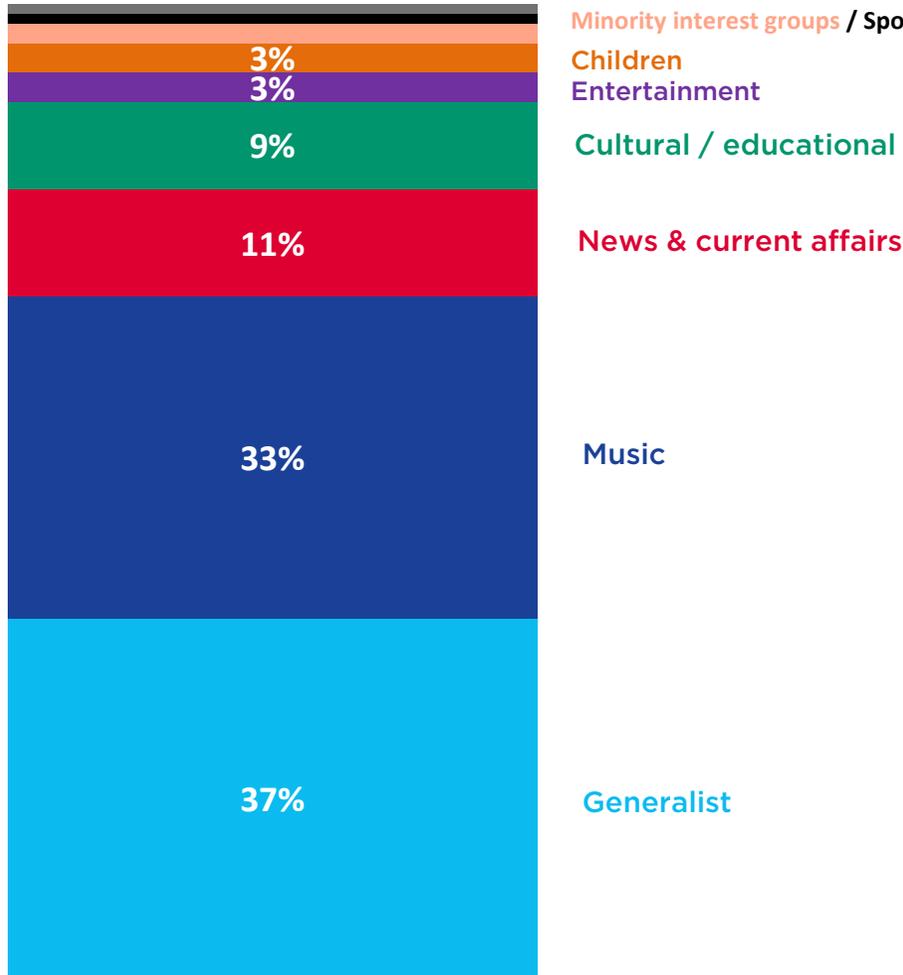
DIGITAL RADIO GENRES - ALL STATIONS



MUSIC DOMINATES NOTABLY IN THE EXCLUSIVE OFFER

Music is cross-sectional, being also part of the schedule in the Generalist, Minority interest groups, Religion, and Other services.

DIGITAL RADIO GENRES – PUBLIC STATIONS

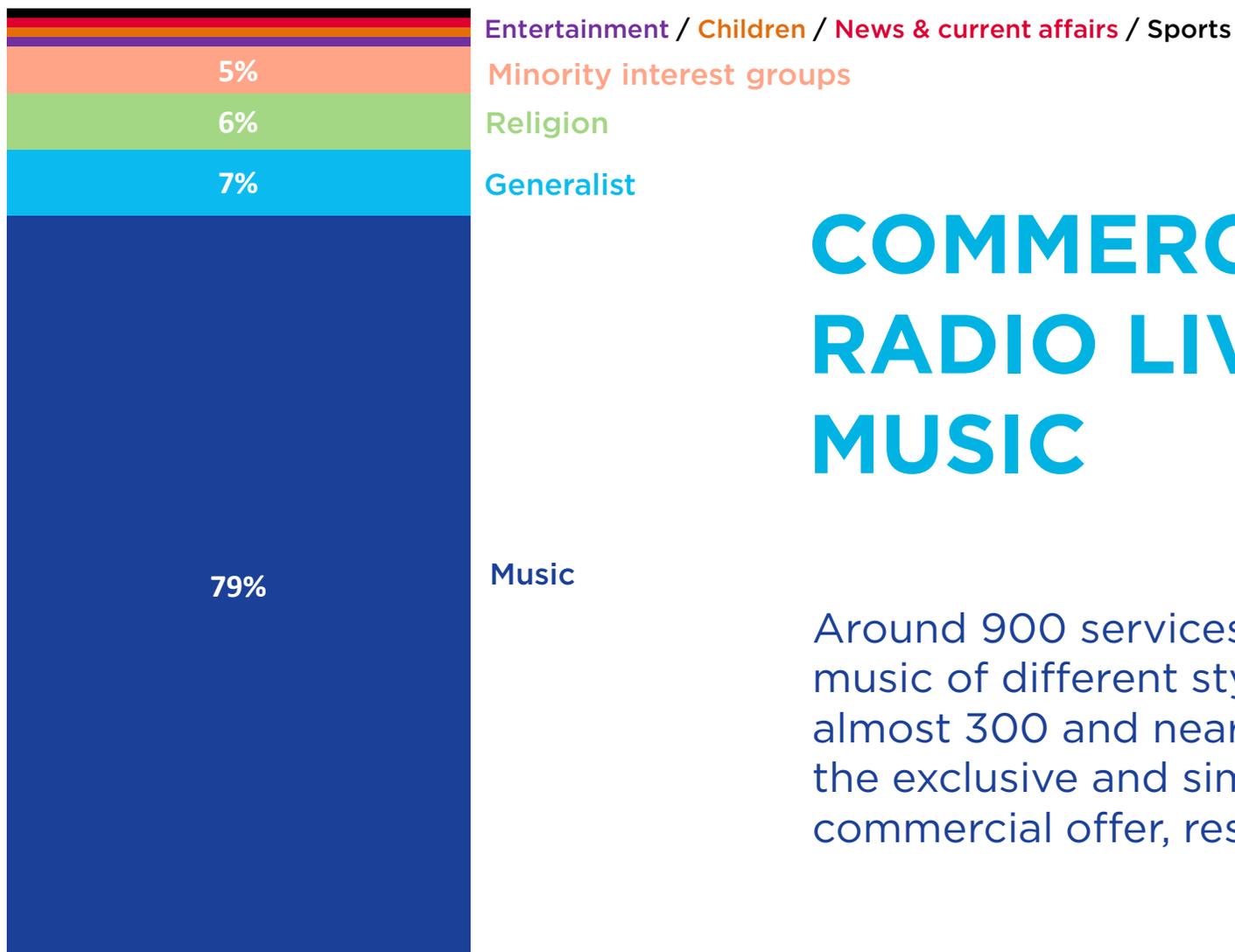


PUBLIC RADIO FULLFILS ITS REMIT

WITH A WIDER VARIETY OF GENRES
THAN COMMERCIAL RADIO

The long tail of genres includes some stations offering Cultural & Educational services, Sports, Children services and others targeting Minority interest groups.

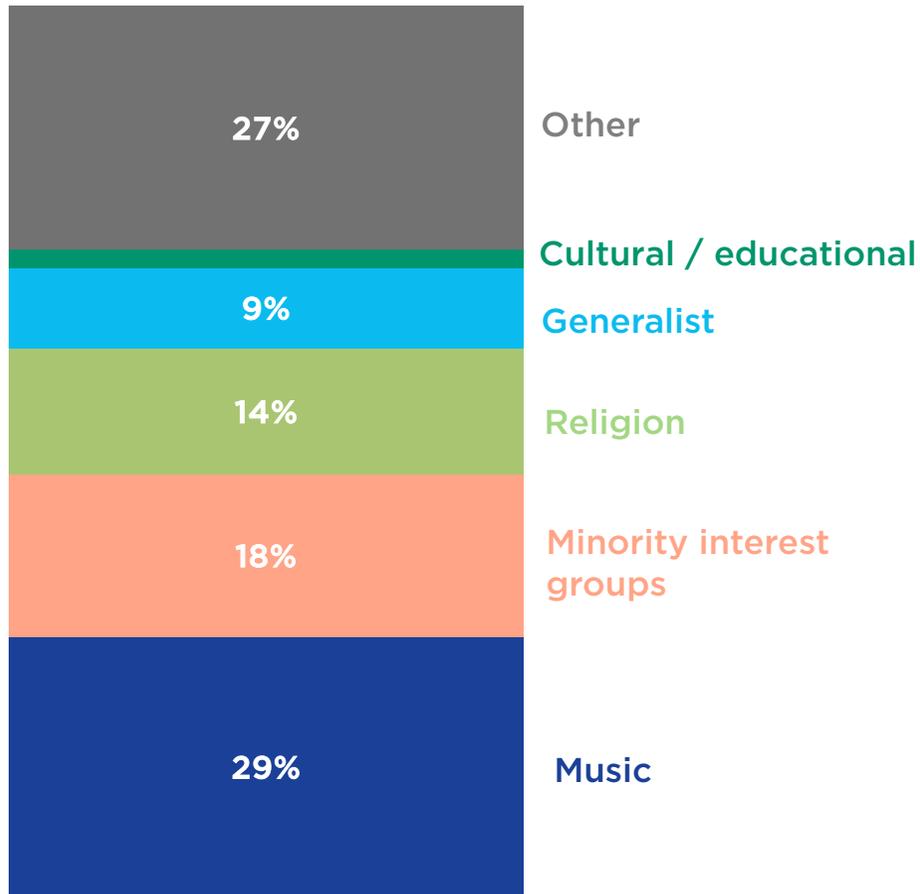
DIGITAL RADIO GENRES – COMMERCIAL STATIONS



COMMERCIAL RADIO LIVES FOR MUSIC

Around 900 services are built around music of different styles. It represents almost 300 and near 600 services of the exclusive and simulcast commercial offer, respectively.

DIGITAL RADIO GENRES – OTHER STATIONS



OTHER RADIOS, OTHER SERVICES

Non-commercial and non-public stations serve niche communities and diverse social groups through different genres, mainly music and Other.

MEDIA INTELLIGENCE SERVICE

This report is published by the European Broadcasting Union's Media Intelligence Service (MIS).

MIS provides Member broadcasting organizations with the latest market data, research and analysis needed to plan their future strategies and stay ahead of the game.

Our experts cover a broad range of topics, including TV and radio trends, new media developments, market structure and concentration, funding and public policy issues.

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