

EBU

OPERATING EUROVISION AND EURORADIO

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MARKET INSIGHTS **DIGITAL RADIO 2019**

MEDIA INTELLIGENCE SERVICE

FEBRUARY 2019



ABOUT THIS REPORT

This is the fourth 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 2019 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 2019 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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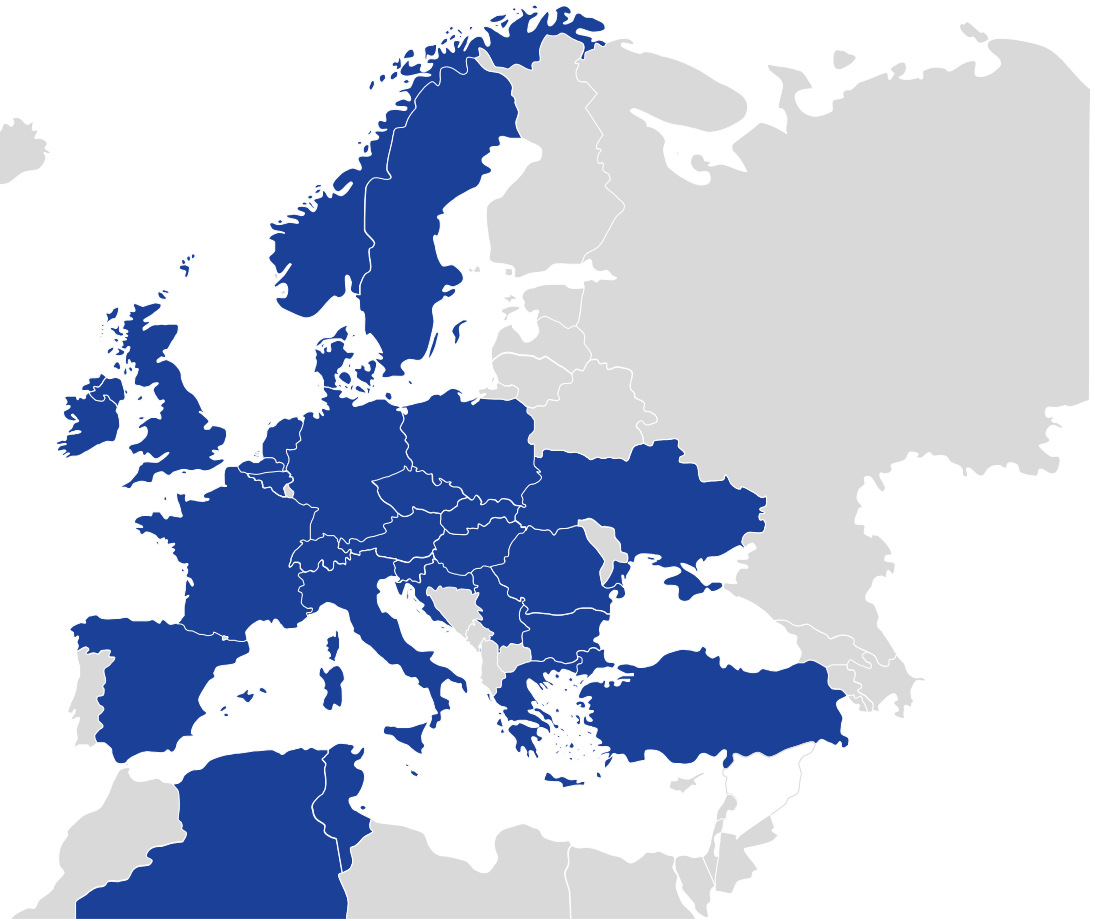
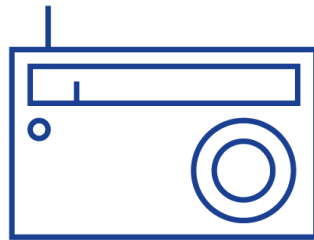
DIGITAL RADIO ACROSS THE EBU AREA

1 566 STATIONS

BROADCAST IN DIGITAL
TERRESTRIAL RADIO ACROSS

31 MARKETS

IN THE EBU AREA



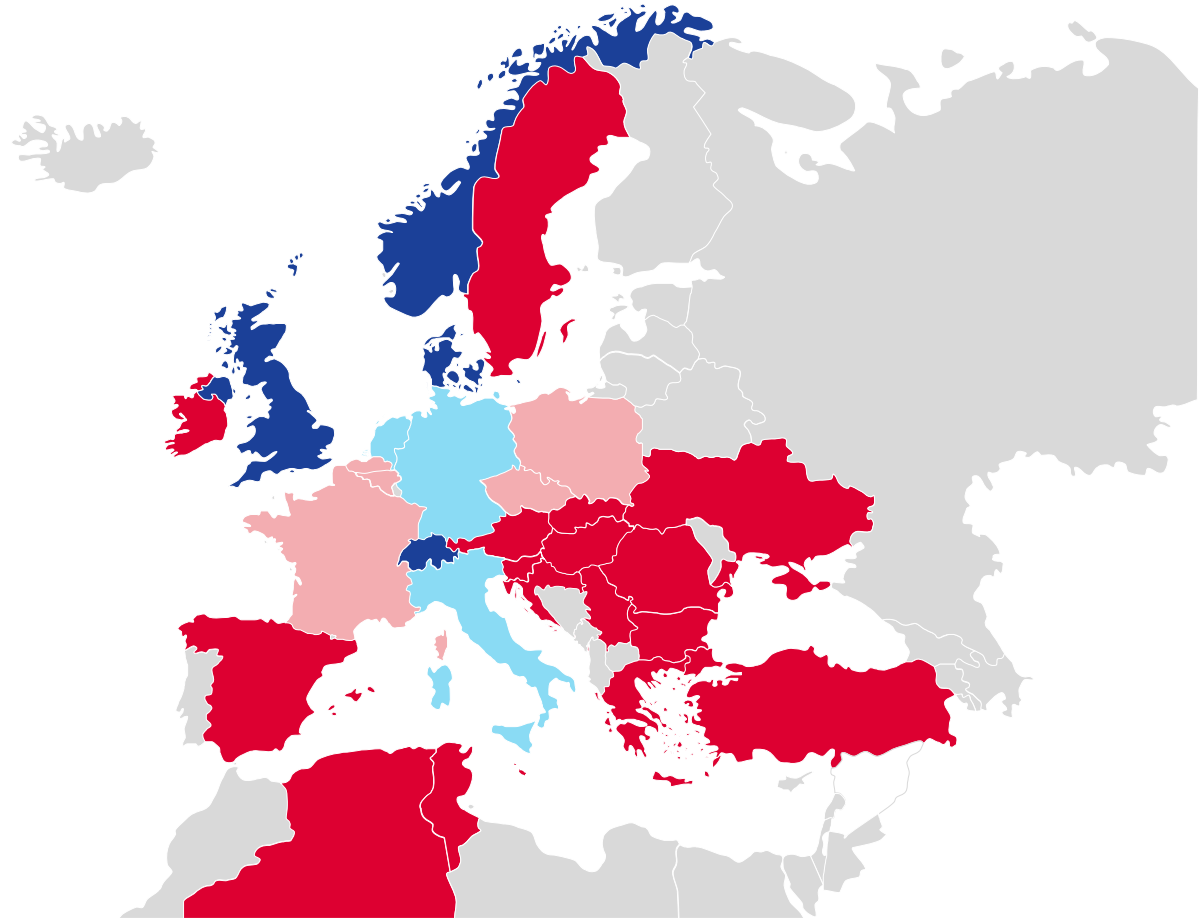
DIGITAL RADIO ROLL-OUT MAP

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 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 (this can be seen, for example, in the lack of exclusive services).



DIGITAL RADIO OWNERSHIP

TWO-THIRDS

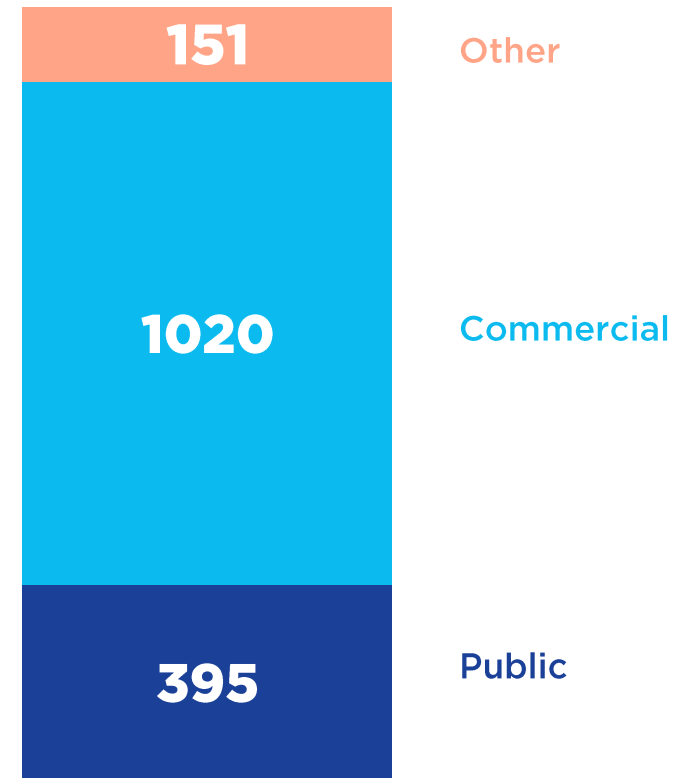
OF DIGITAL STATIONS ARE

COMMERCIAL

SERVICES,

WHILE PUBLIC STATIONS REPRESENT

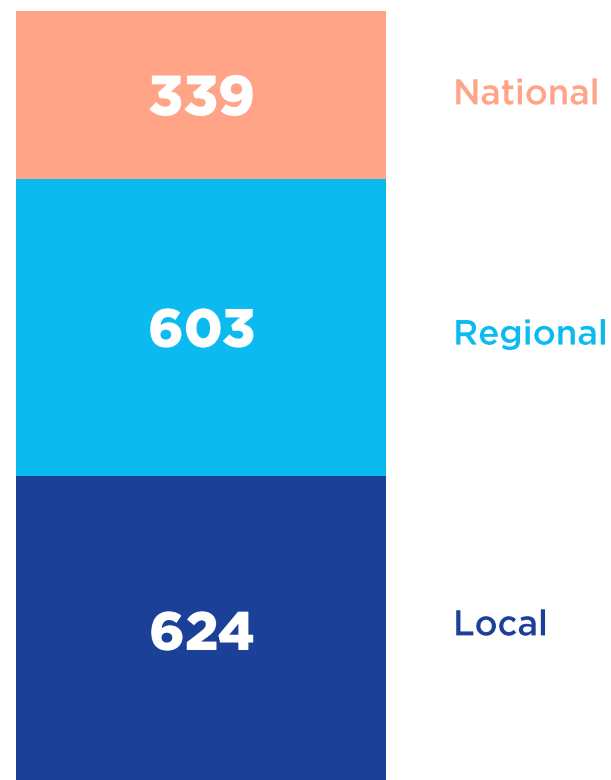
ONE QUARTER OF THE OFFER



DIGITAL RADIO COVERAGE

MOST
DIGITAL STATIONS
TARGET
LOCAL AREAS

WHILE REGIONAL SERVICES ARE
THE ONES GROWING MORE QUICKLY



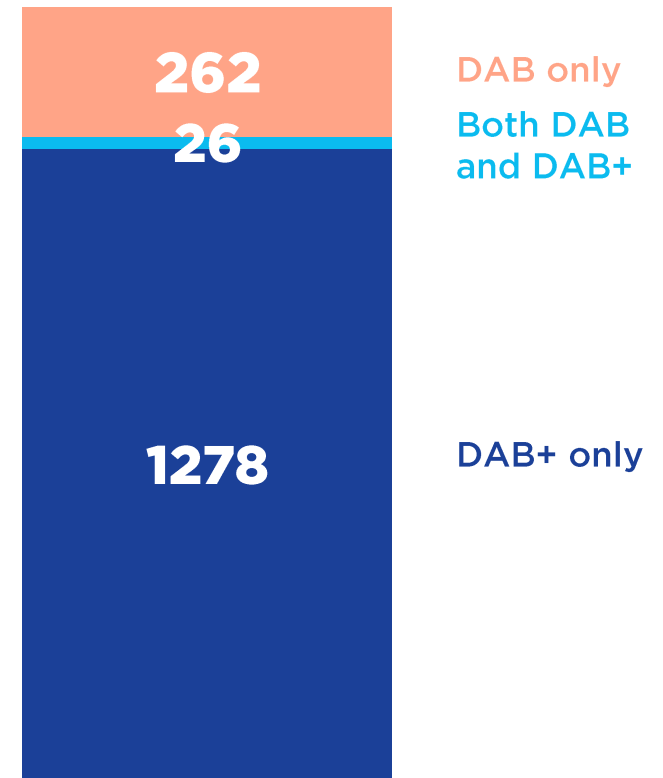
DIGITAL RADIO STANDARDS

MORE THAN 80%

OF DIGITAL STATIONS

USE DAB+

WHILE THE DAB STANDARD
CONTINUES TO BE PHASED OUT



DIGITAL RADIO STANDARDS

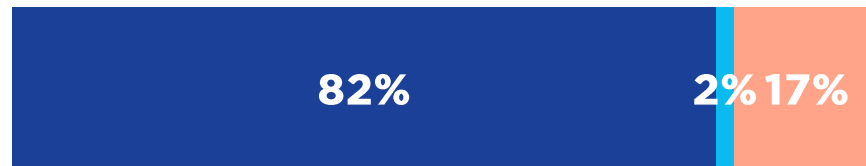
DAB PROGRESSIVELY PHASED OUT

The traction gained by the more advanced DAB+ standard in the last years is leading to the end of DAB.

The only country where it is not possible to listen to DAB+ in preference to DAB is Romania, while in Ireland, Spain and Sweden broadcasts in both systems are available. In the French Community of Belgium, DAB+ was officially launched in November 2018 and DAB has now been phased out.

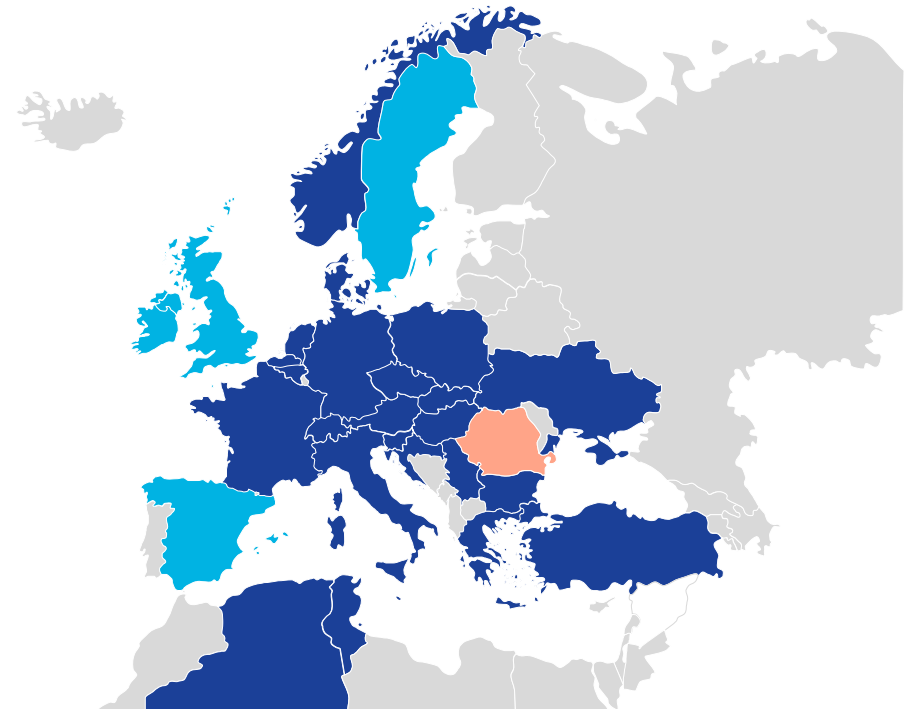
The UK is the most challenging case, as it is home to 86% of European DAB stations. But with DAB+ being used by nearly 100 stations in less than 3 years since it was launched in 2016, transition of current DAB services is likely to happen at some point in the future.

DIGITAL RADIO STATIONS BY STANDARD



■ DAB+ only ■ Both DAB and DAB+ ■ DAB only ■ No DAB(+)

DIGITAL RADIO STANDARDS BY COUNTRY



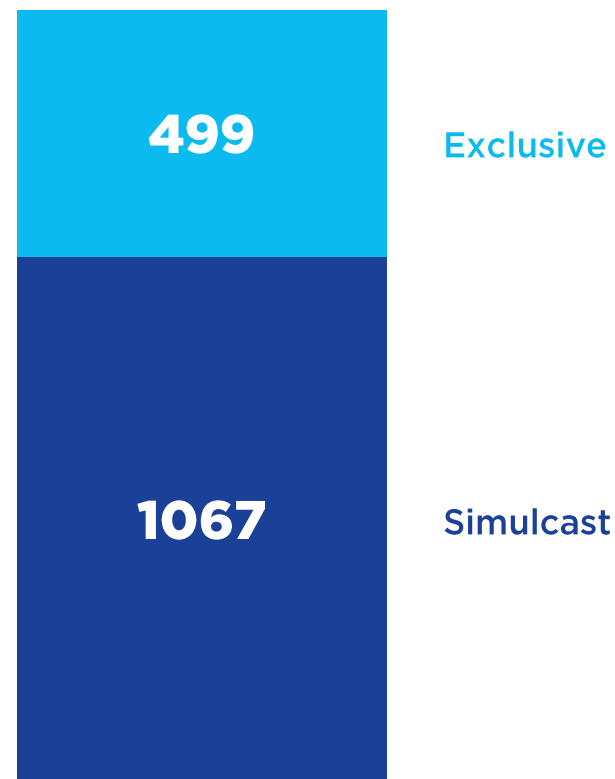
DIGITAL RADIO EXCLUSIVITY

ONE THIRD

OF DIGITAL STATIONS ARE

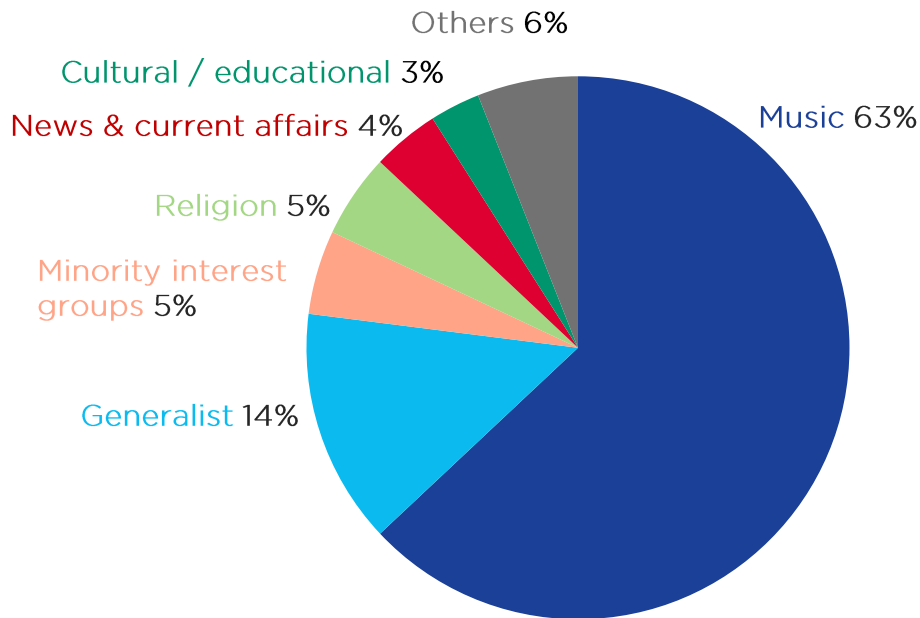
EXCLUSIVE

SERVICES, ADDING VALUE
TO THE ANALOGUE OFFER



DIGITAL RADIO GENRES – ALL STATIONS

DIGITAL RADIO STATIONS BY GENRE



MUSIC IS THE KEY GENRE

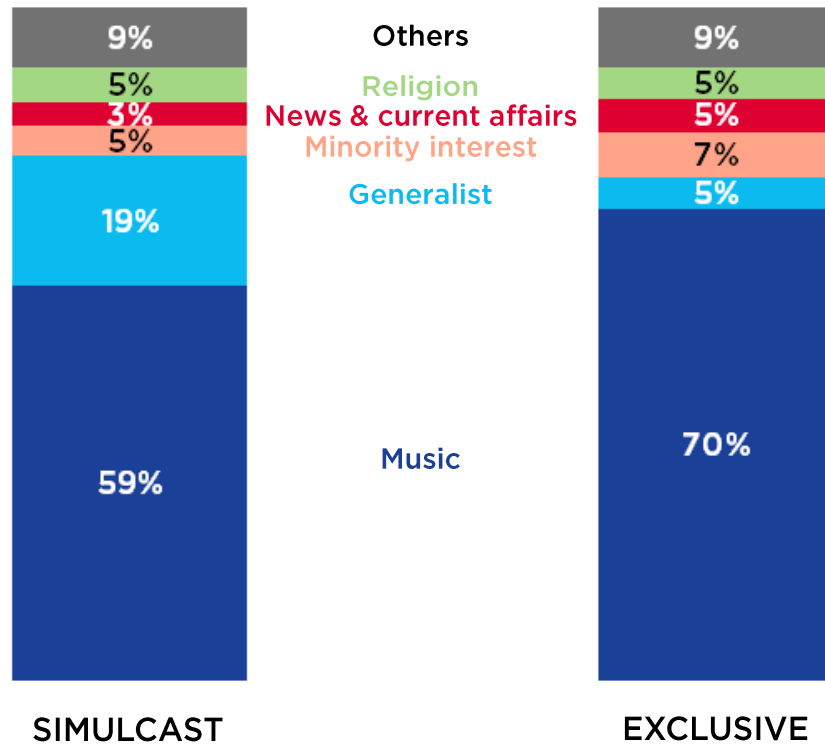
Music has always been a bedrock of radio and this role increases with digital radio as nearly two thirds of the stations broadcasting in digital terrestrial radio in the EBU Area can be labelled as music stations. This represents nearly 1,000 music stations.

NEW EMERGING GENRES

Beyond music and generalist stations, minority interest stations –those targeting specific communities– and religious ones emerge as the most common stations, even ahead of news & current affairs. This shows the ability of digital radio to target underserved audiences.

DIGITAL RADIO GENRES - ALL STATIONS

DIGITAL RADIO STATIONS BREAKDOWN BY GENRE



MUSIC IS EVEN MORE CENTRAL IN DIGITAL

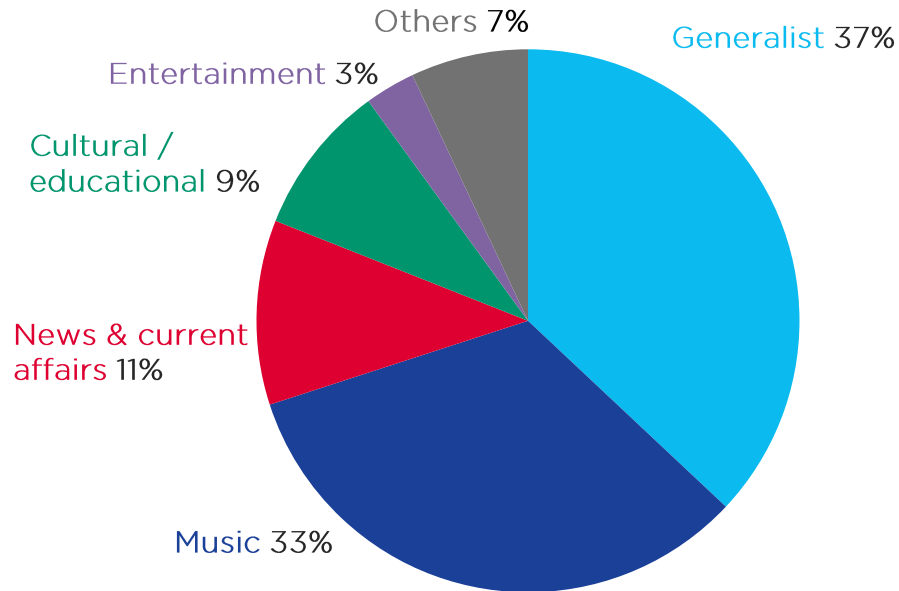
Music has a central position in the radio industry. Actually, most of the radio stations in the analogue world are music stations. With digital, this trend is even more acute. The growing number of genres and subgenres within music makes it easy to create a new station around one of those. As a result, 70% of all the exclusive digital terrestrial stations are music services, 11 points above those simulcasting an analogue signal.

LOOKING FOR THE NEXT NICHE

Every fifth station simulcasting analogue and digital is generalist but only every twentieth station broadcasting only in digital is generalist. There seems to be limited scope for additional generalist services in digital. Instead, smaller genres such as news & current affairs and stations targeting minority interest groups emerge.

DIGITAL RADIO GENRES – PUBLIC STATIONS

DIGITAL PUBLIC RADIO STATIONS BY GENRE



A GENERAL PURPOSE TO SERVE EVERYBODY

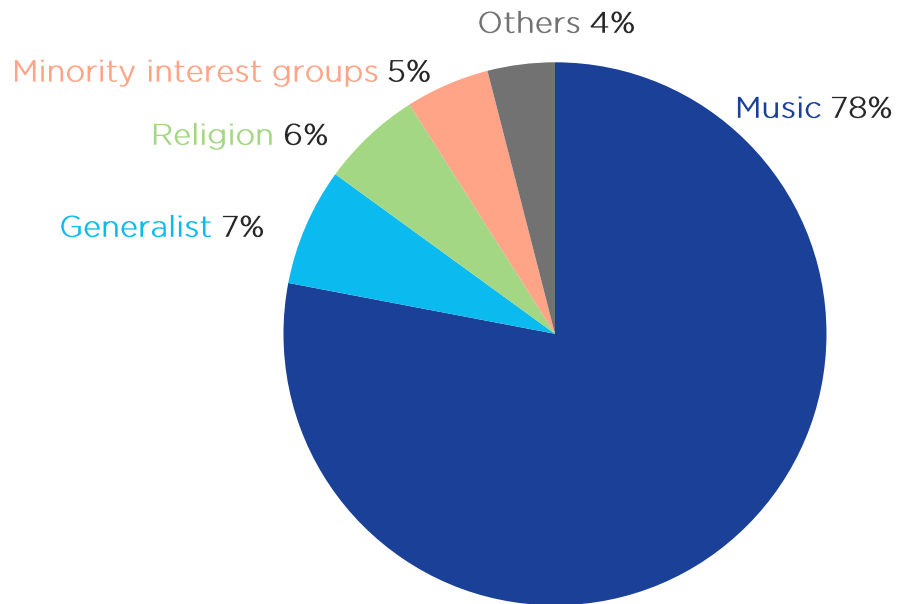
Generalist stations offering a varied mix of genres are the main category of stations for public broadcasters. This adds up to 147 stations across the EBU Area.

A LONG TAIL OF GENRES

Beyond generalist services, public stations follow their remit to serve different needs of the audience by broadcasting stations serving for specific purposes, such as news & current affairs services and cultural and educational stations.

DIGITAL RADIO GENRES – COMMERCIAL STATIONS

DIGITAL COMMERCIAL RADIO STATIONS BY GENRE



HIGH DEPENDENCE ON MUSIC

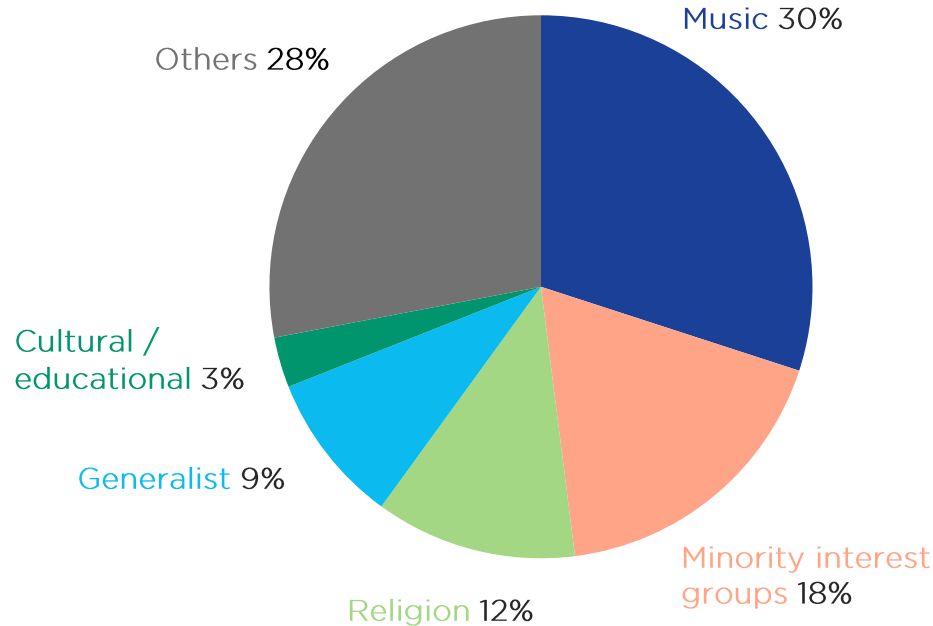
Commercial radio is built around music stations and digital is no exception. More than 800 commercial music stations are available in DAB / DAB+, nearly 80% of all commercial services.

NICHE GENRES EMERGING

Beyond music and generalist stations, minority interest stations –those targeting specific communities– and religious ones are the most common stations. Services for minorities are especially popular in the UK while religious stations are more evenly distributed across Europe, notably in Norway, the UK, Poland and Switzerland.

DIGITAL RADIO GENRES – OTHER STATIONS

DIGITAL OTHER RADIO STATIONS BY GENRE



HIGH VARIETY

By their own nature, non-public and non-commercial stations offer a high variety of genres and/or serve niche communities and social groups. Music is its main genre but with a lower percentage, similar to public radio. Actually, music is as big as minority interest groups and religious stations together.

CORRELATED WITH LOCAL COVERAGE

There is a correlation between the countries with more local services and those with more non-public and non-commercial stations, namely the United Kingdom, Italy, France and Germany.

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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