

EBU

OPERATING EUROVISION AND EURORADIO

AUDIENCE TRENDS **RADIO 2015**

MEDIA INTELLIGENCE SERVICE
OCTOBER 2015

METHODOLOGY

- Data sources for this report is provided by EBU Members through the Media Intelligence Survey and the GEAR network.
- Year on year evolutions are only based on countries with comparable figures. All those with methodological differences have been excluded.
- Youth age group refers to 15-24 year olds, though some market definitions vary.

AUDIENCE DATA DEFINITIONS

Daily Listening Time (HH:MM)

The average number of minutes of radio that each individual listened per day



Weekly Reach (000s / %)

Everyone that listened for at least 15 consecutive minutes in an average week, though in some markets definitions vary. Expressed as the total amount of people or as a % of the population



Market Share (%)

% of listening based on the total radio-listening audience



AGGREGATED DATA

Daily listening times across markets are averaged to give the average daily listening time

Reach in 000s across markets are added together to give the total reach in 000s

Reach % across markets are averaged to give the average reach in %

Market shares across markets are averaged to give the average market share

CONTENT

SECTION 1 **LISTENING TIME**

SECTION 2 **REACH**

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SECTION 1

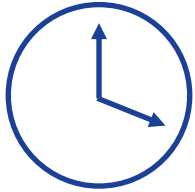
LISTENING TIME

EBU

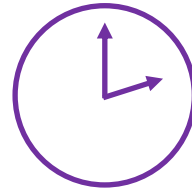
OPERATING EUROVISION AND EURORADIO



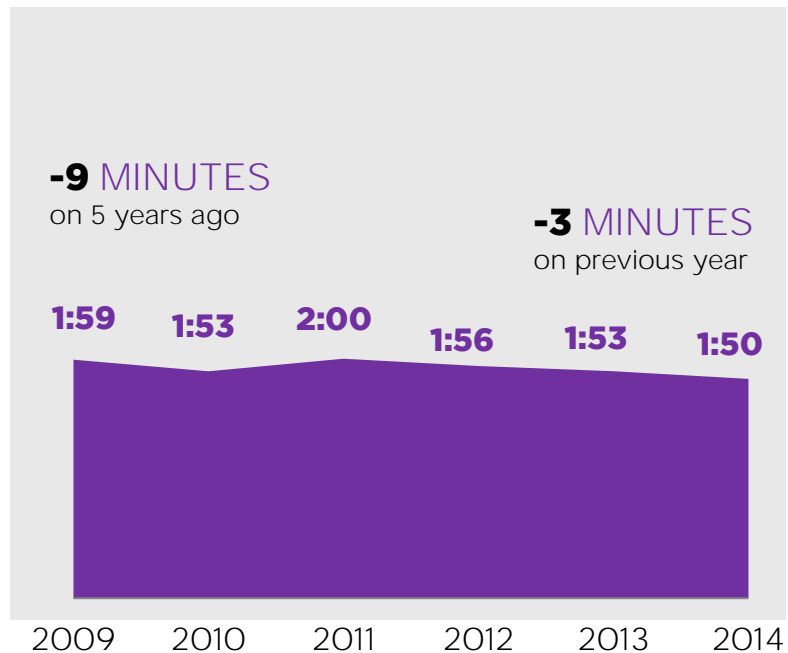
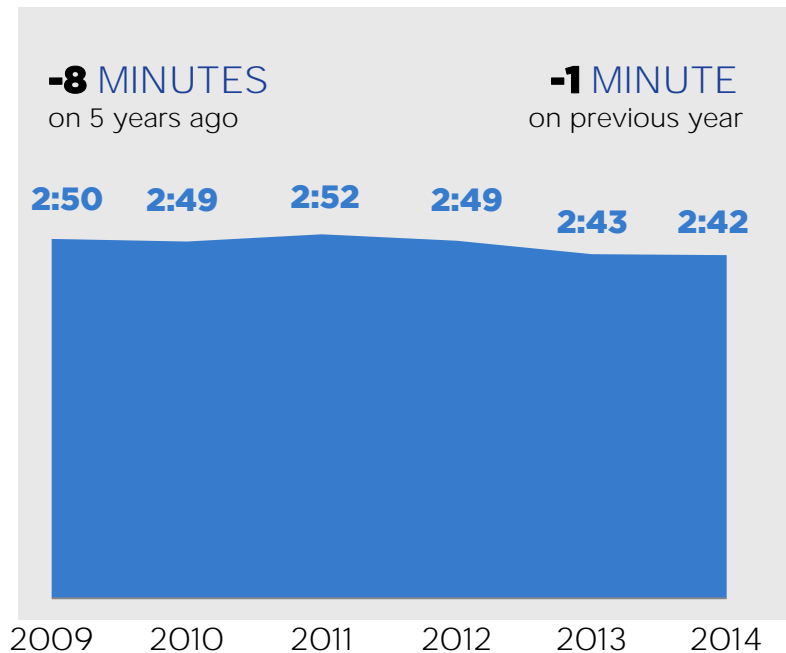
2014 RADIO LISTENING TIME



EUROPEAN CITIZENS
in 2014 listened to on average
2:42 OF RADIO DAILY



EUROPEAN YOUTH
in 2014 listened to on average
1:50 OF RADIO DAILY



Stable listening time overall, however declines among youth persist in the majority of markets

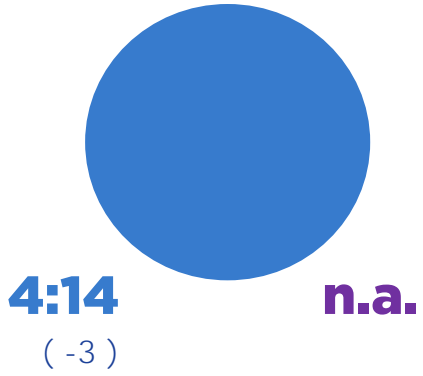
● All ● Youth

2014 daily listening time (in H:MM)

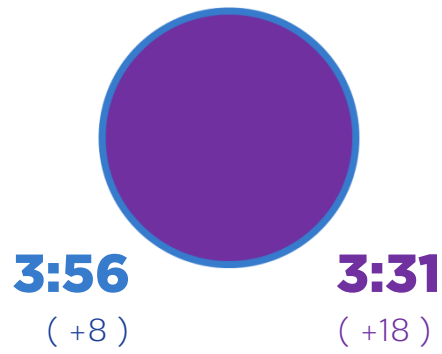
() Difference on previous year (in minutes)

HEAVY RADIO LISTENERS

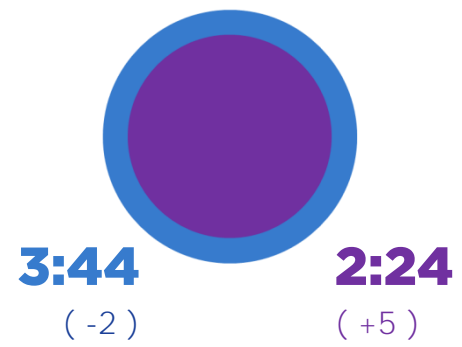
RUSSIAN FEDERATION



HUNGARY

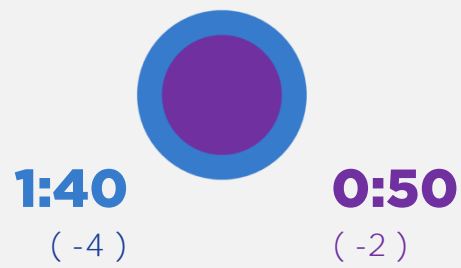


ESTONIA

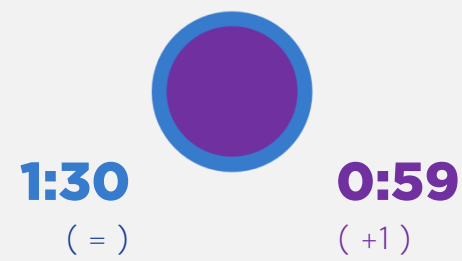


LIGHT RADIO LISTENERS

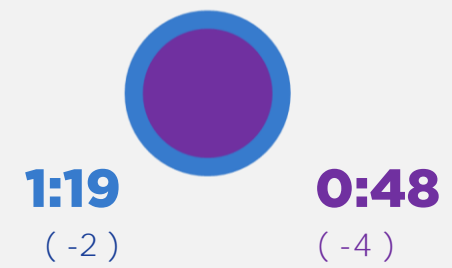
SWITZERLAND



NORWAY

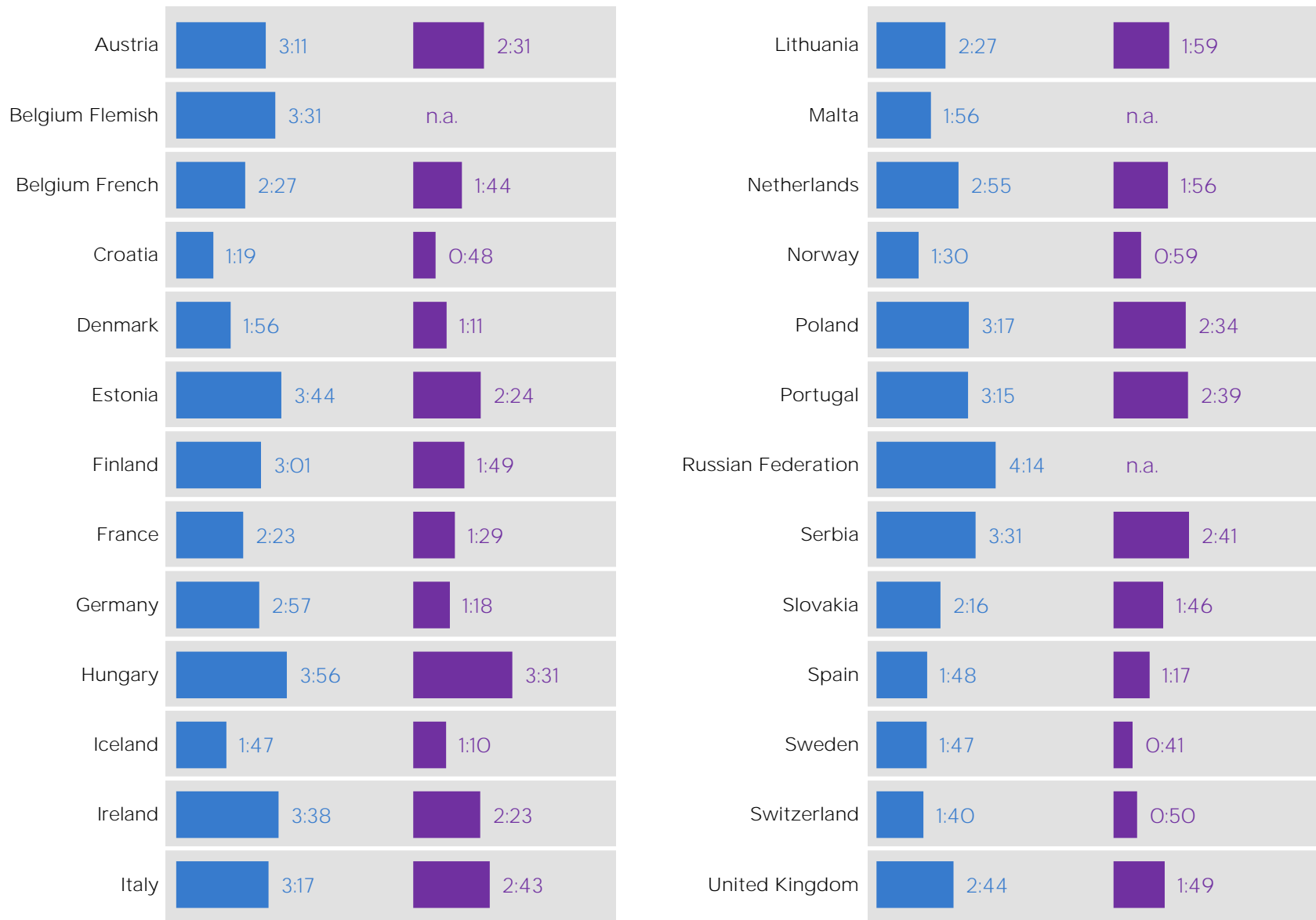


CROATIA



2014 RADIO LISTENING TIME

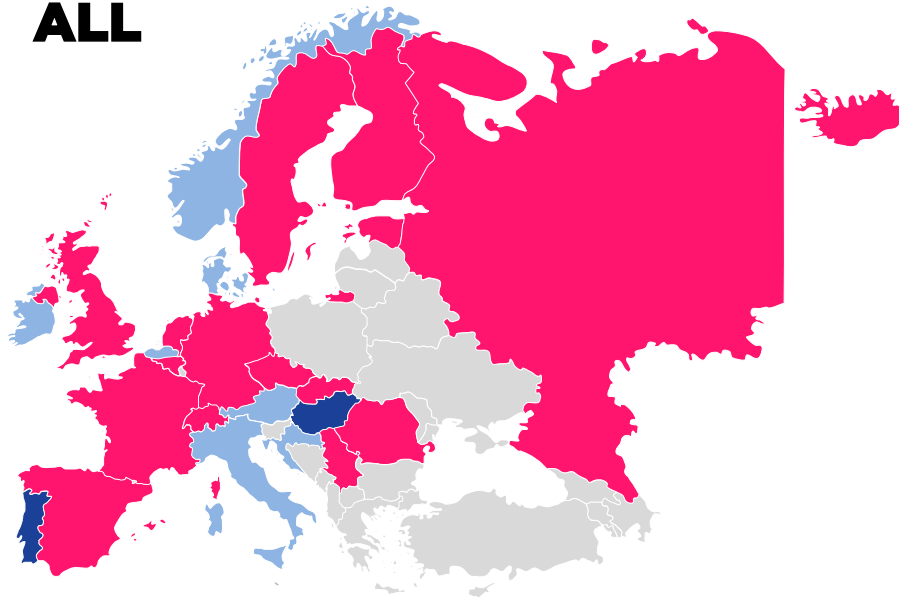
■ All ■ Youth
in H:MM



2014 RADIO LISTENING TIME

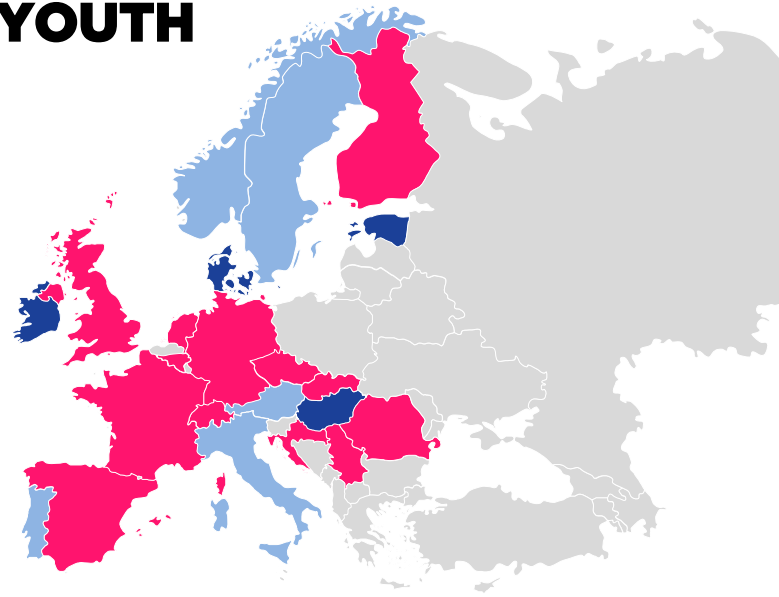
- Increase vs 2013
- Level with 2013*
- Decrease vs 2013
- No evolution data

ALL

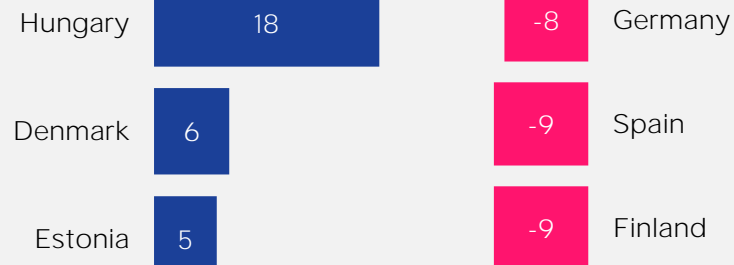
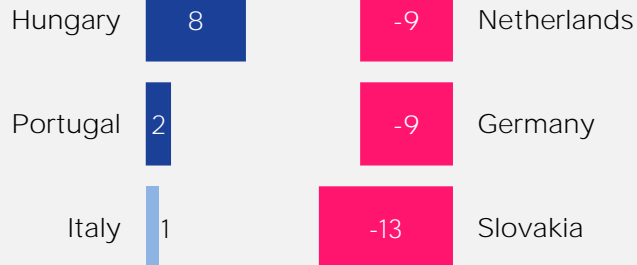


68% of markets saw a **DECREASE** of listening time in 2014

YOUTH



64% of markets saw a **DECREASE** of listening time among youth in 2014



SECTION 2

REACH

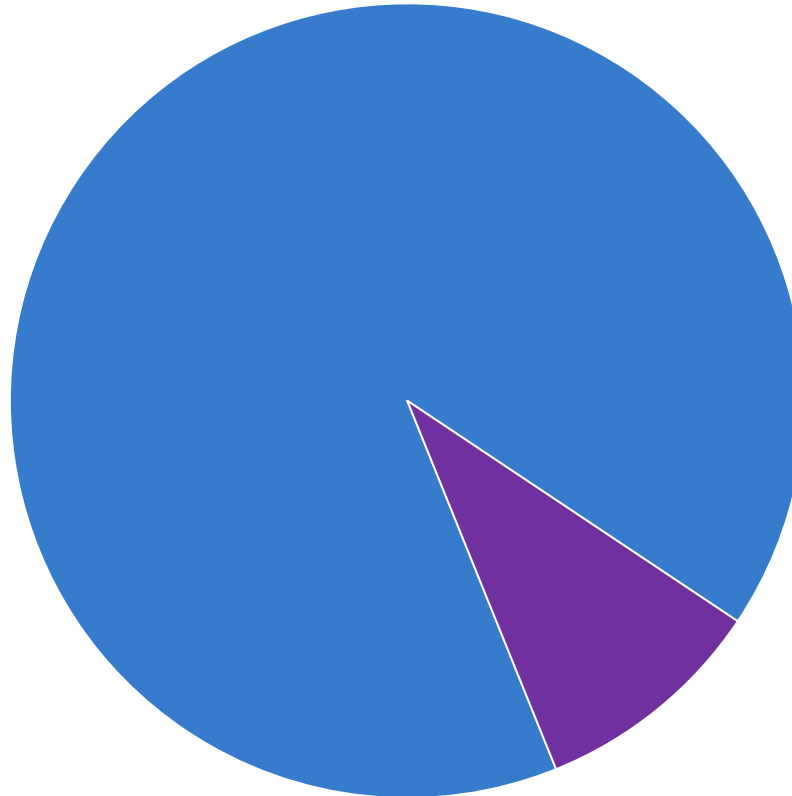
EBU

OPERATING EUROVISION AND EURORADIO



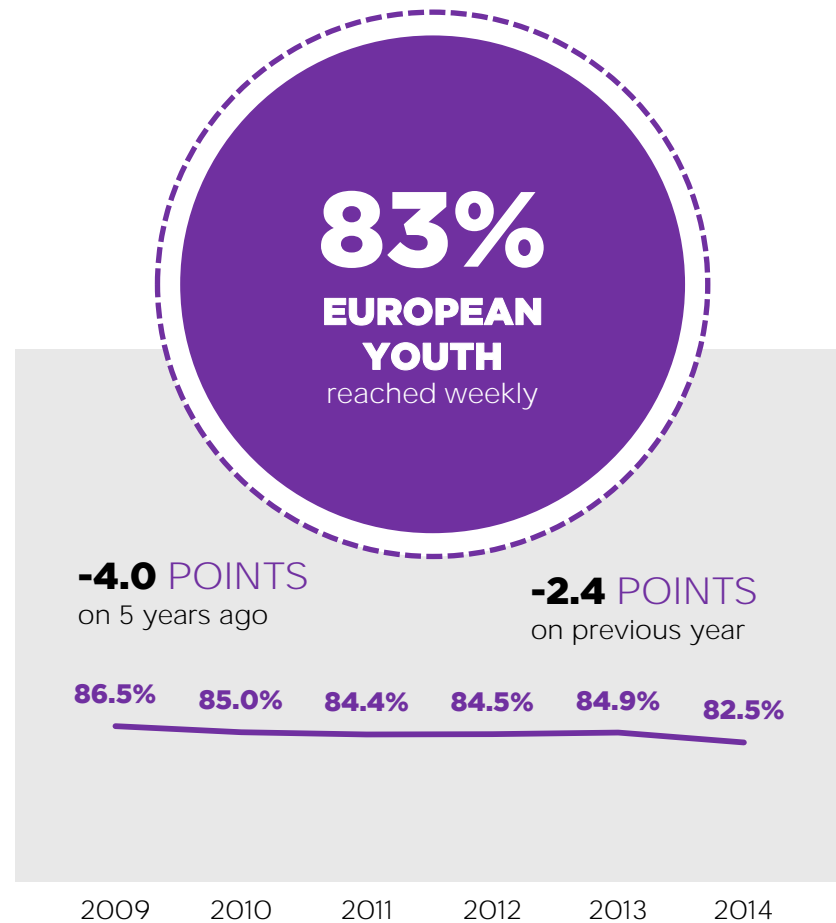
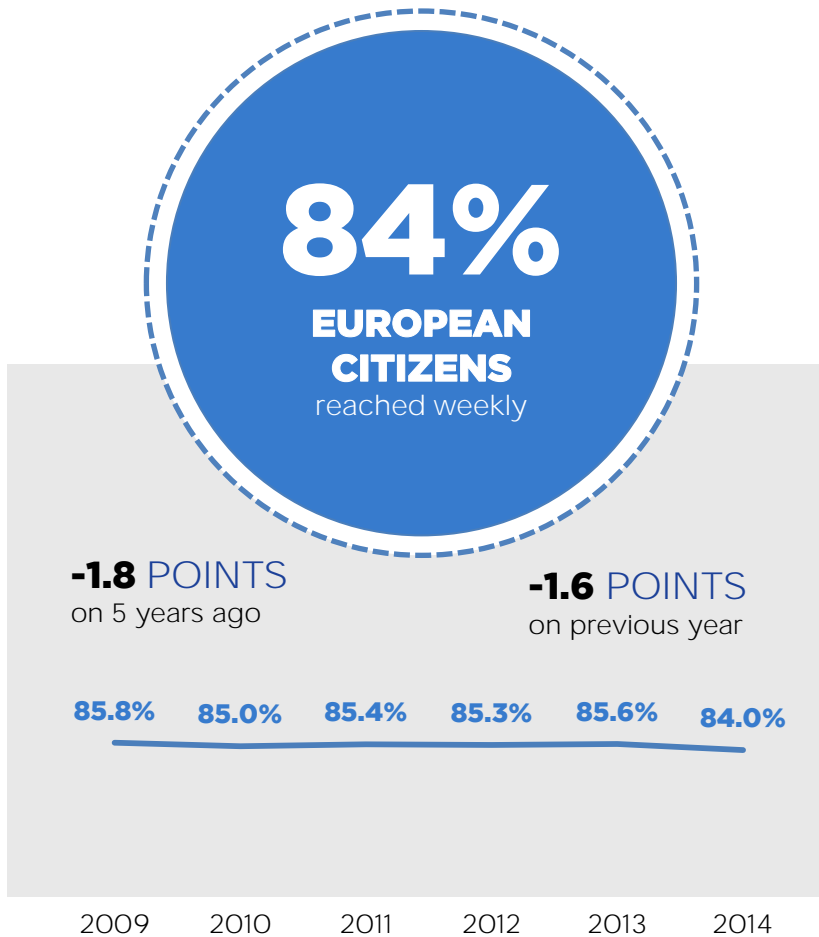
RADIO WEEKLY REACH IN 2014

420
MILLION
LISTENERS
reached weekly



including
40
MILLION
YOUNG LISTENERS
reached weekly

RADIO WEEKLY REACH IN 2014



Slight decline of weekly reach, more acute among youth

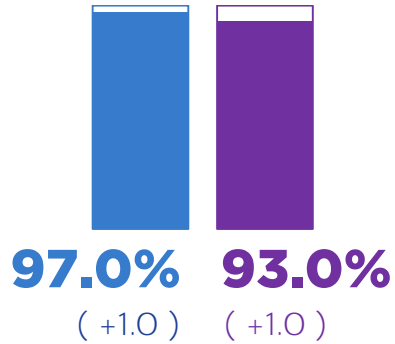
HIGH RADIO REACH

■ All ■ Youth

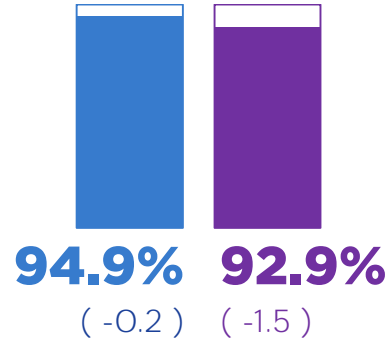
2014 weekly reach (in %)

() Difference on previous year (in points)

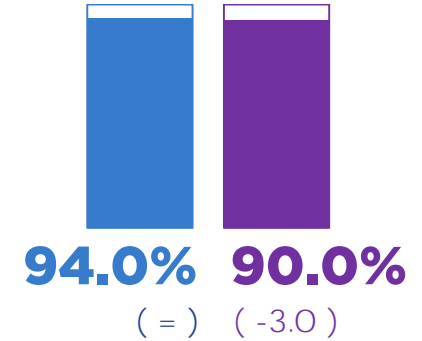
ESTONIA



AUSTRIA

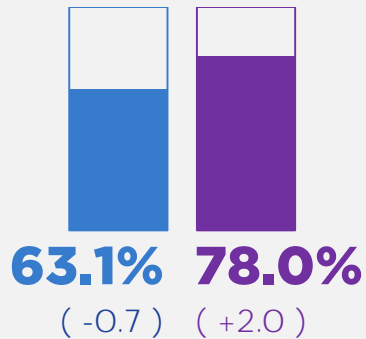


FINLAND

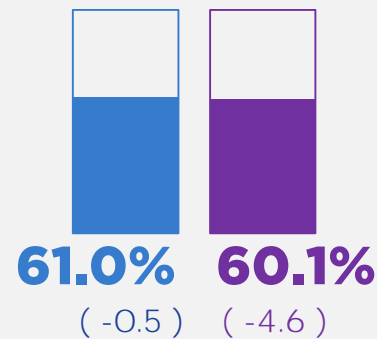


LOW RADIO REACH

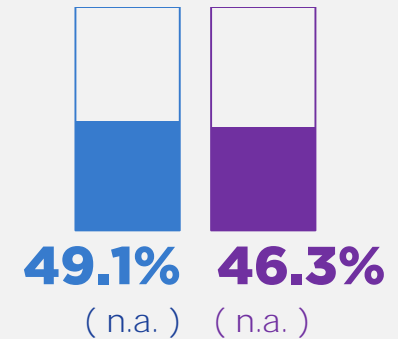
SERBIA



SPAIN

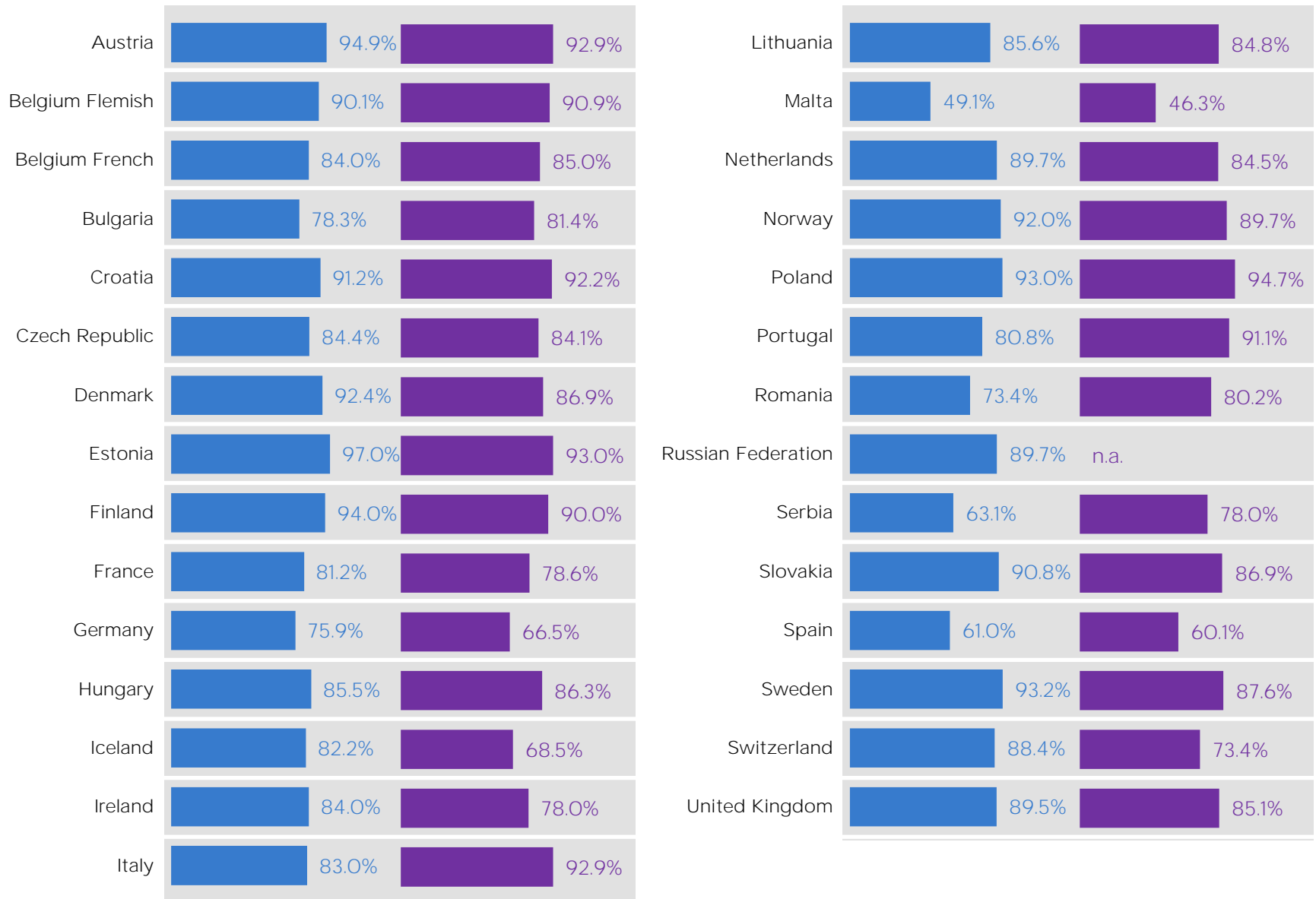


MALTA



2014 RADIO WEEKLY REACH

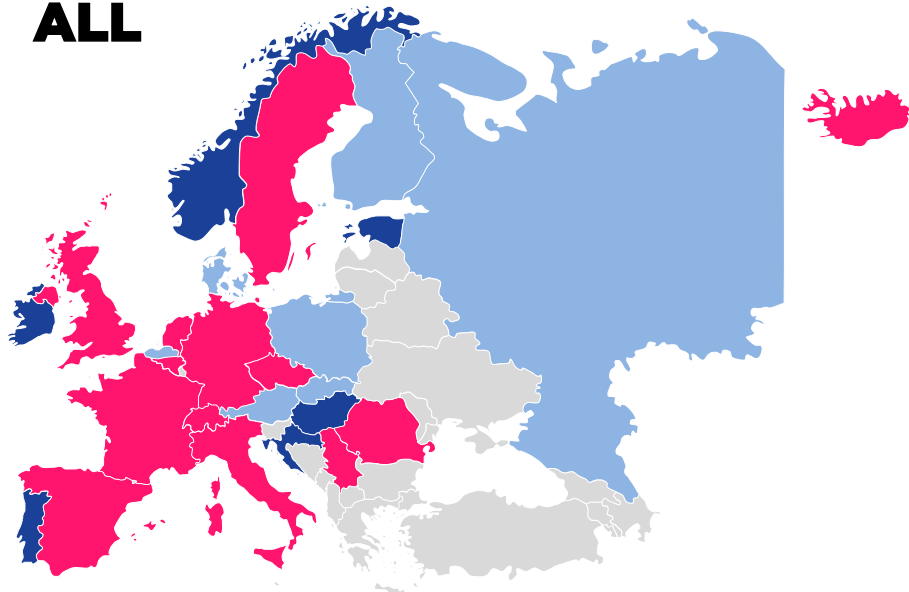
■ All ■ Youth



2014 RADIO WEEKLY REACH

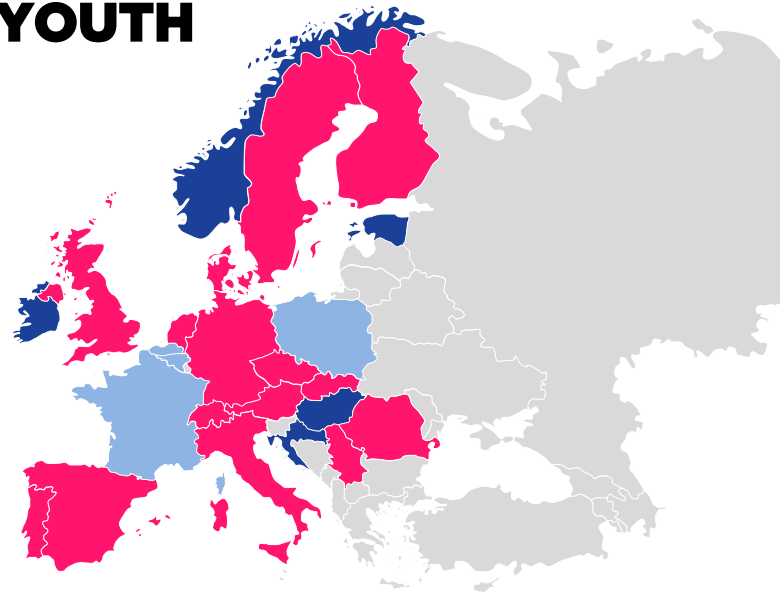
- Increase vs 2013
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- Decrease vs 2013
- No evolution data

ALL

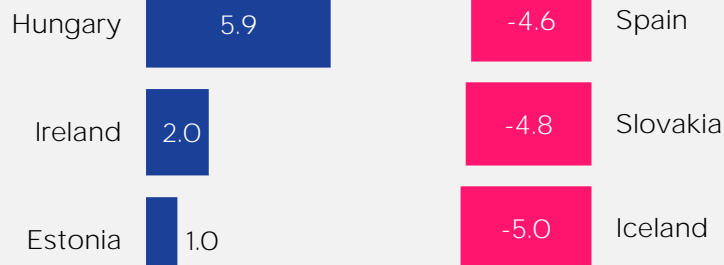
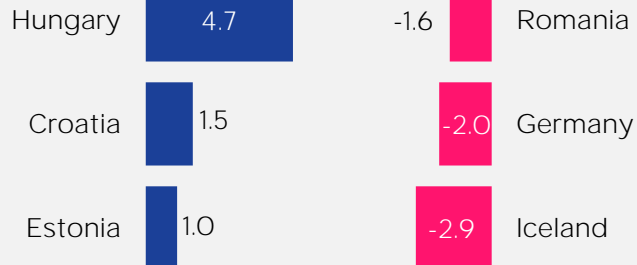


50% of markets saw a **DECREASE** of radio weekly reach in 2014

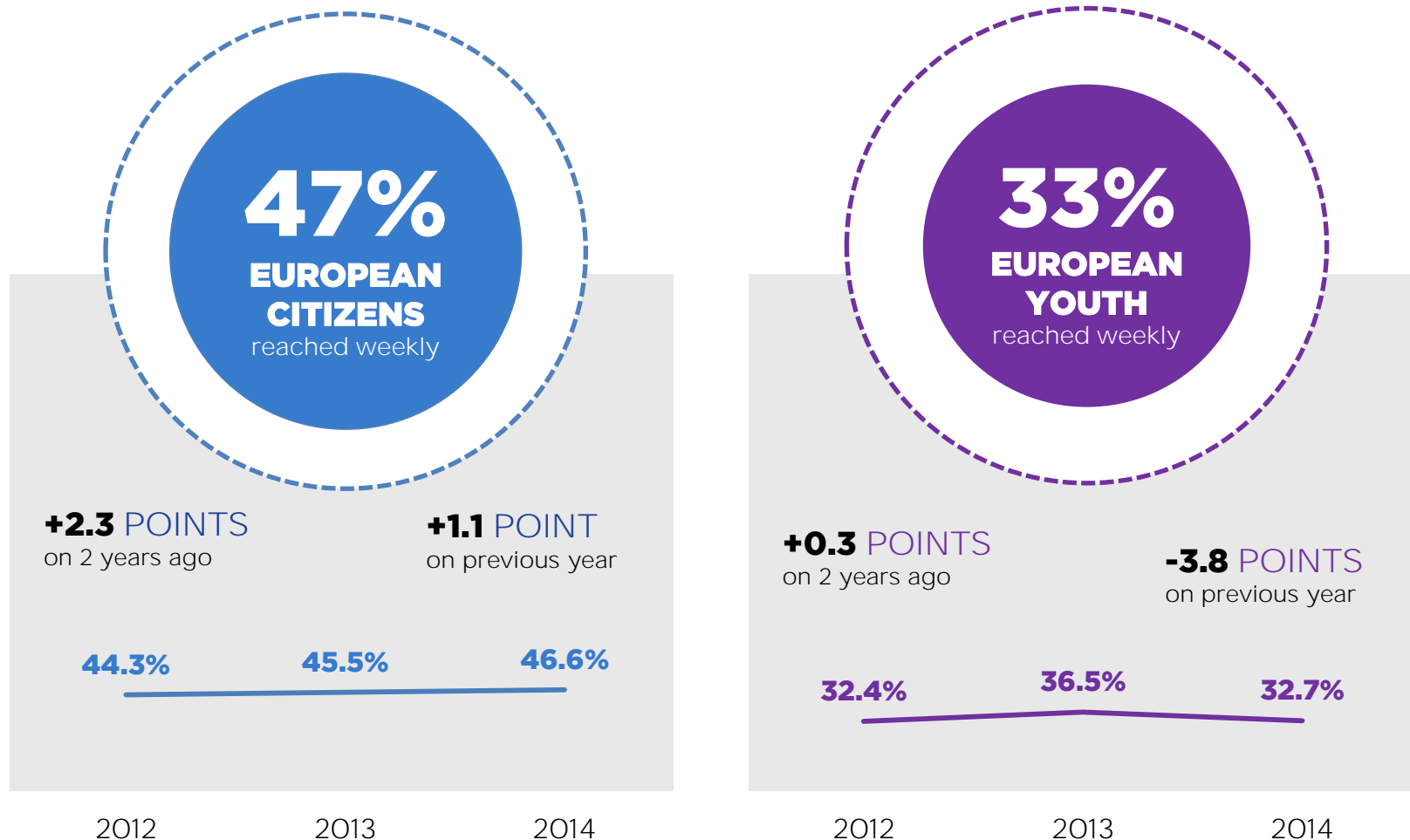
YOUTH



64% of markets saw a **DECREASE** of radio weekly reach among youth in 2014



PSM RADIO WEEKLY REACH IN 2014



Public service radio increased its reach although youth are still much harder to attract

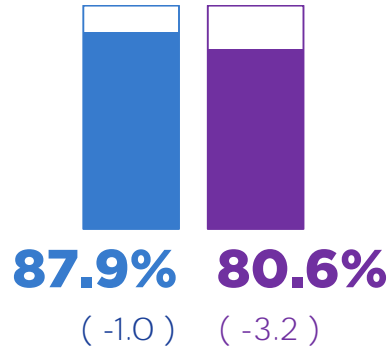
HIGH PSM RADIO WEEKLY REACH

■ All ■ Youth

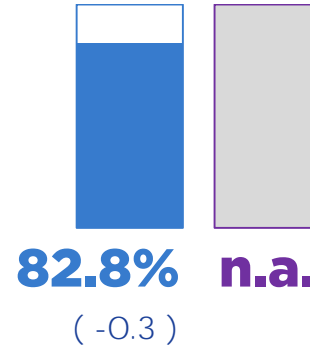
2014 weekly reach (in %)

() Difference on previous year (in points)

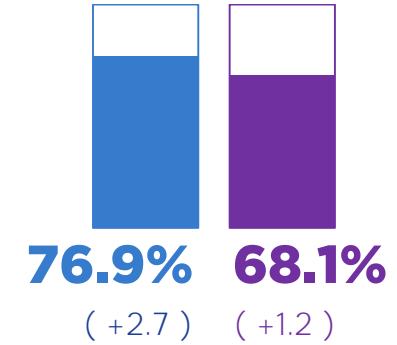
AUSTRIA



DENMARK

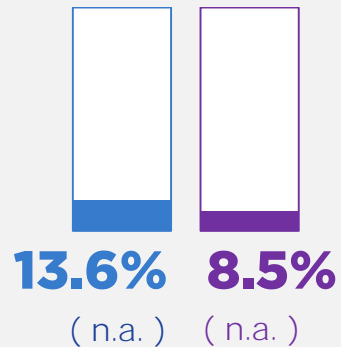


NORWAY

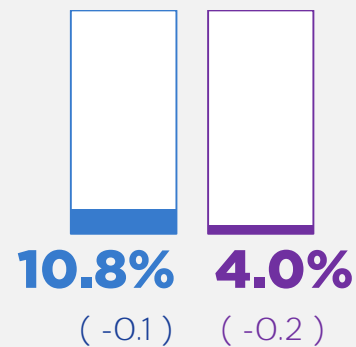


LOW PSM RADIO WEEKLY REACH

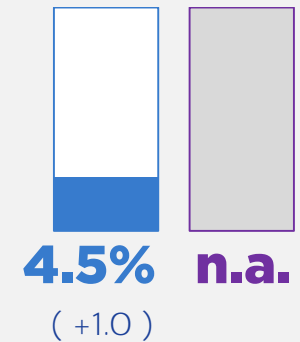
SERBIA



SPAIN

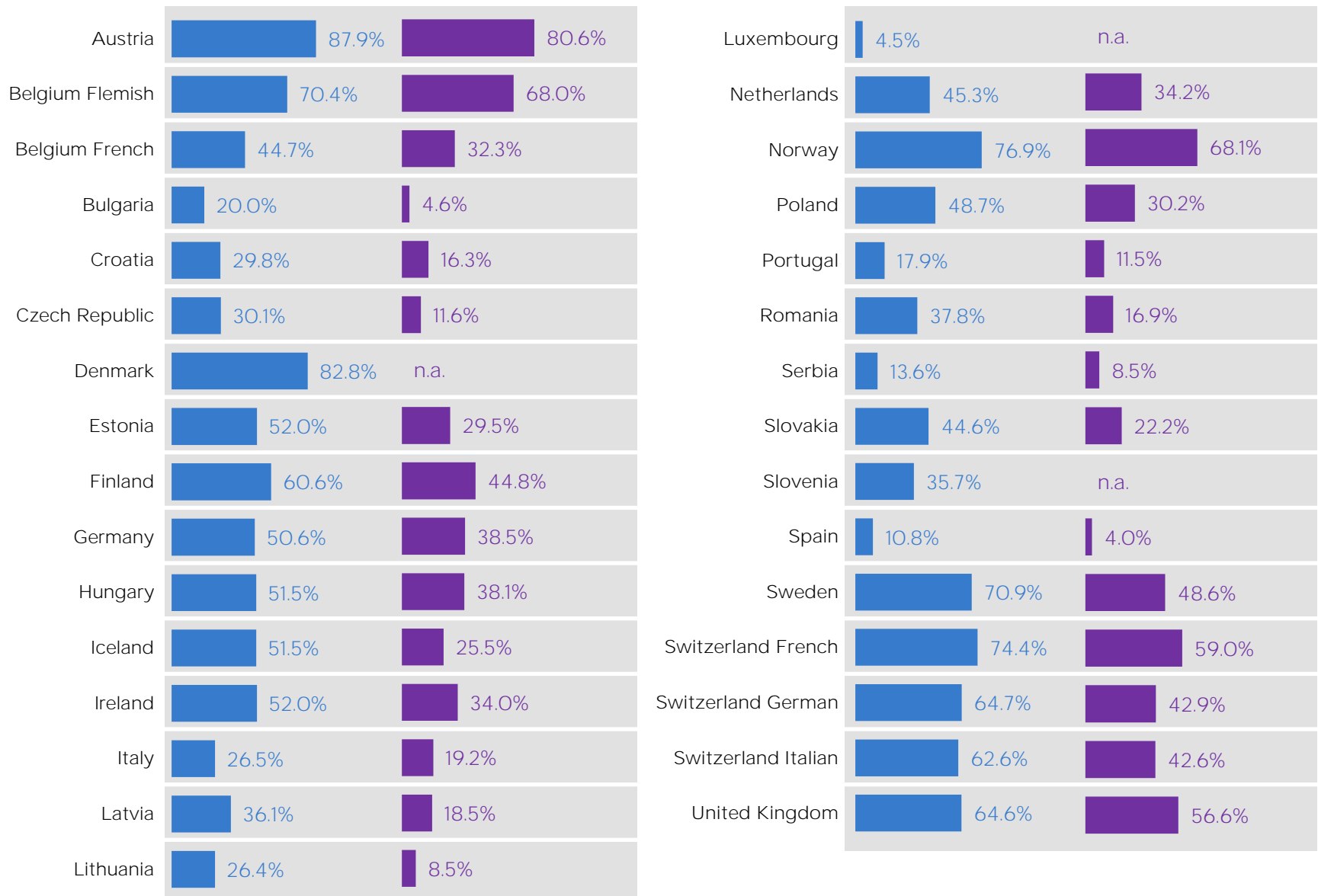


LUXEMBOURG



2014 PSM RADIO WEEKLY REACH

■ All ■ Youth



LISTENING TIME

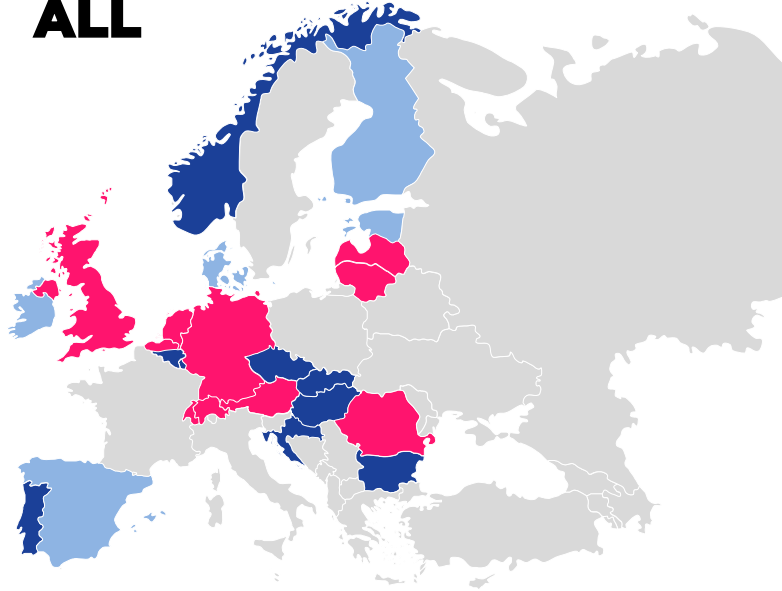
REACH

MARKET SHARE

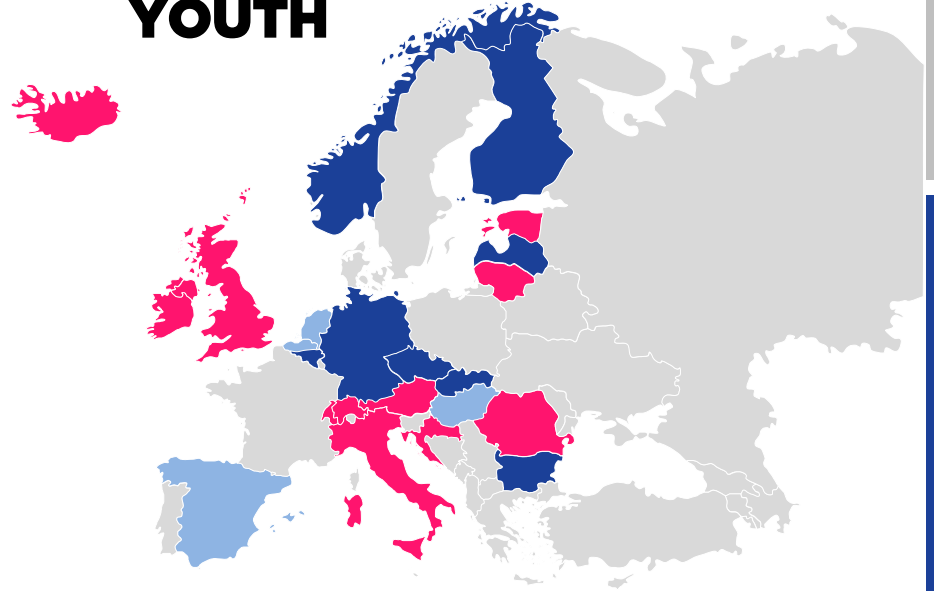
2014 PSM RADIO WEEKLY REACH

- Increase vs 2013
- Level with 2013*
- Decrease vs 2013
- No evolution data

ALL



YOUTH



44% of markets saw a **DECREASE** in PSM radio weekly reach in 2014

48% of markets saw a **DECREASE** in PSM radio weekly reach among youth in 2014

| | | | | |
|---|----------|-----|------|-----------|
| Difference on previous year (in points) | Slovakia | 5.1 | -3.2 | Iceland |
| | Bulgaria | 4.5 | -3.8 | Latvia |
| | Norway | 2.7 | -4.0 | Lithuania |

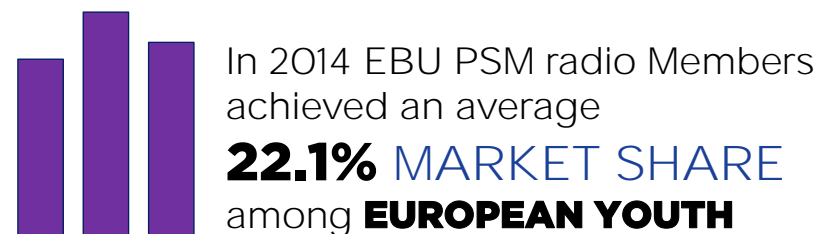
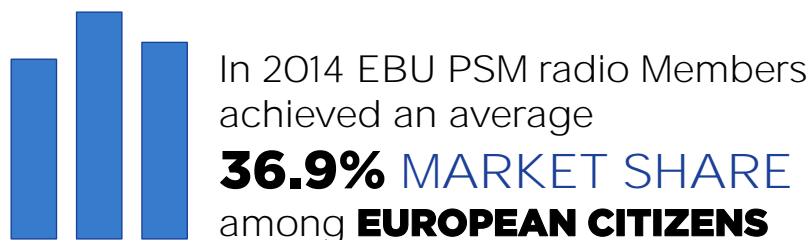
| | | | |
|------------|-----|------|----------------|
| Bulgaria | 4.2 | -4.0 | Ireland |
| Belgium Fr | 3.9 | -4.4 | Switzerland Fr |
| Slovakia | 3.9 | -6.8 | Italy |

SECTION 3

MARKET SHARE



PSM RADIO MARKET SHARE IN 2014



-0.8 POINTS
on 5 years ago

-0.3 POINTS
on previous year

37.7% 37.9% 37.9% 37.9% 37.2% 36.9%

Due to the changes in the sample, evolution data of market share among youth are not reliable. When keeping the same sample of countries, market share remained flat from 2013 to 2014.

2009 2010 2011 2012 2013 2014

Public service radio is losing market share at a very slow pace

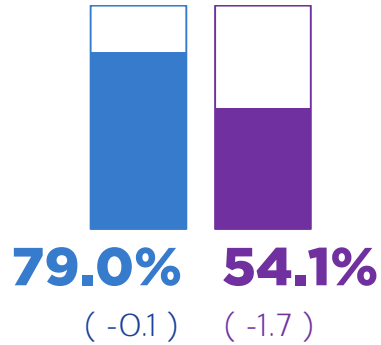
HIGH EBU PSM RADIO MARKET SHARE

■ All ■ Youth

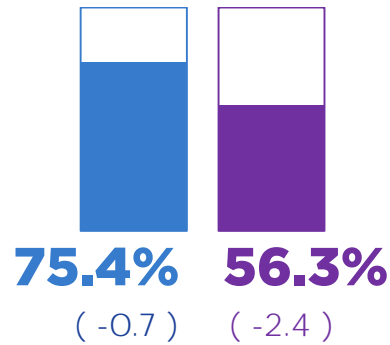
2014 viewing share (in %)

() Difference on previous year (in points)

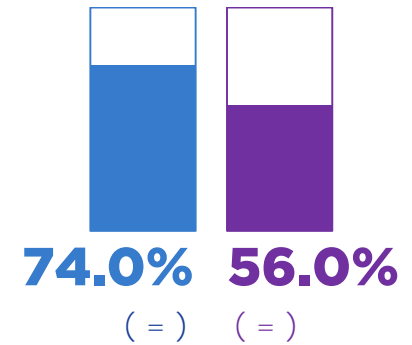
SWEDEN



DENMARK

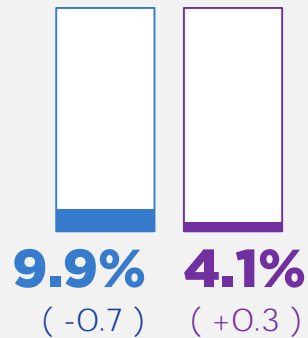


AUSTRIA

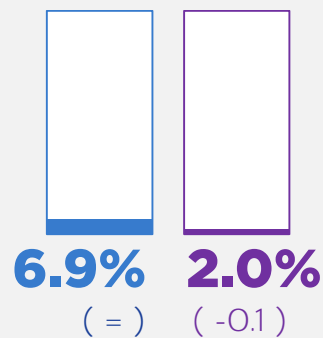


LOW EBU PSM RADIO MARKET SHARE

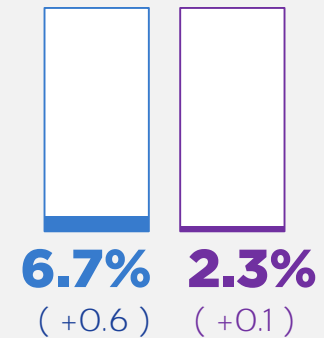
PORTUGAL



SERBIA

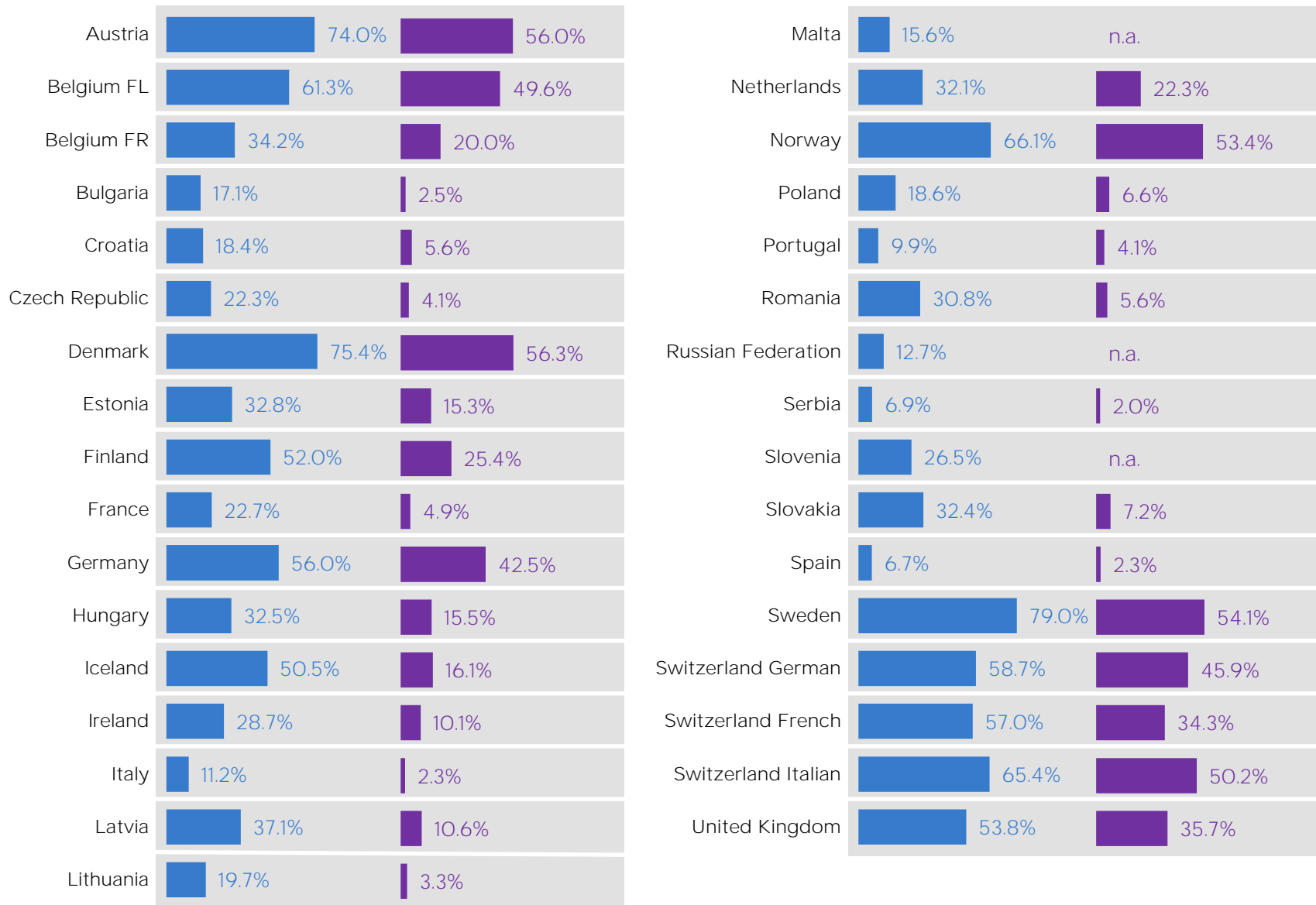


SPAIN



2014 PSM RADIO MARKET SHARE

■ All ■ Youth



LISTENING TIME

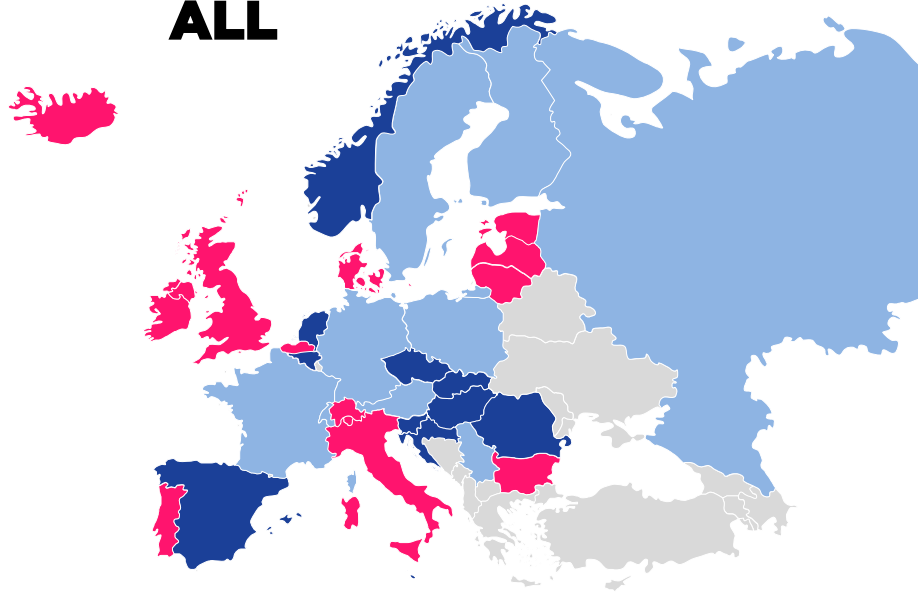
REACH

MARKET SHARE

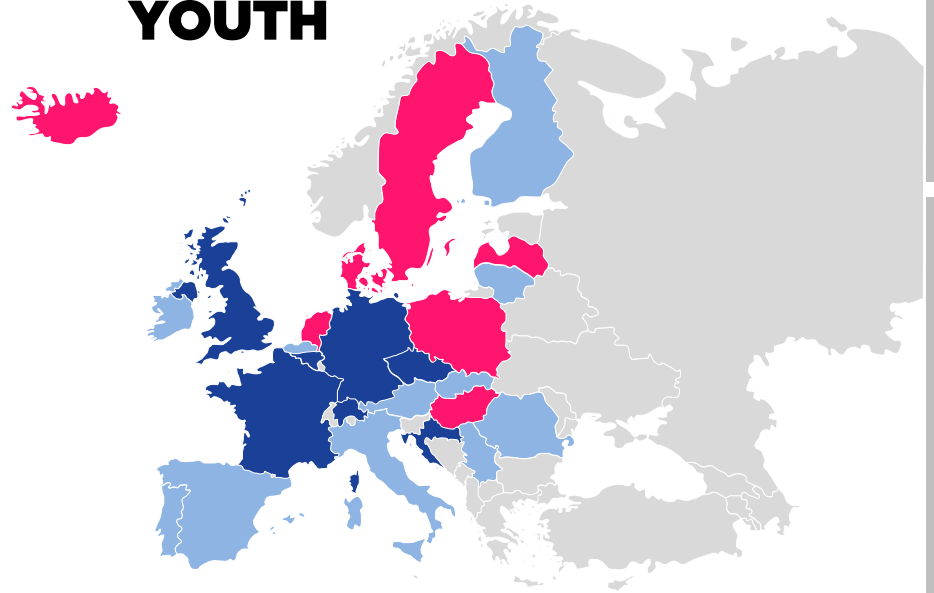
2014 PSM RADIO MARKET SHARE

- Increase vs 2013
- Level with 2013*
- Decrease vs 2013
- No evolution data

ALL



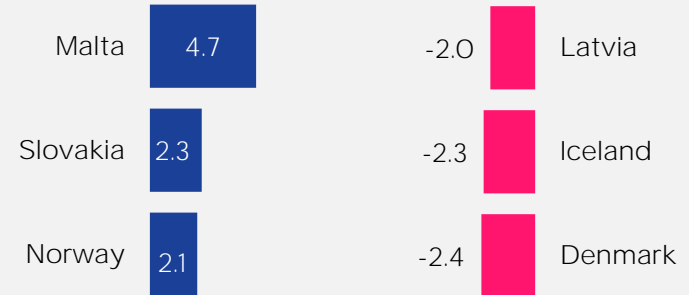
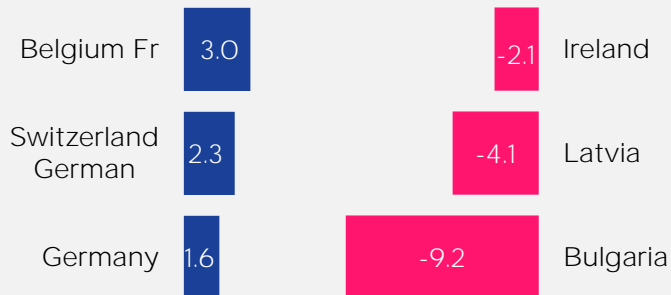
YOUTH



39% of EBU PSM Members saw an **INCREASE** of their market share in 2014

36% of EBU PSM Members saw an **INCREASE** of their market share in 2014

Difference on previous year (in points)



2014 KEY RADIO AUDIENCE TRENDS

- Daily listening time in the EBU Area remained stable on average versus 2013
From 2013 to 2014, daily listening time decreased by just 1 minute to 2 hours 42 minutes
- In most markets, small declines in listening time persisted in 2014
Listening time only increased in Hungary and Portugal
- More than 420 million individuals listened to radio in Europe every week
This figure includes more than 40 million youth
- Weekly reach slightly declined to 84.0% of individuals
Young adults weekly reach was very similar (82.5%)
- PSM radio maintained last year's positive trend in terms of reach
The reach of PSM among youth is nearly 15 points lower than the reach for the whole population
- EBU public service radio achieved an average market share of 36.9%
Among youth, this figure stands at 22.1%
- Although the average share slightly declined in 2014, more of the markets saw increases
The evolution of share among EBU public radio is also quite flat in most of the markets
- Over the last 5 years the trends are a stable reach and a slightly declining listening time
These trends are more acute among youth

MEDIA INTELLIGENCE SERVICE

This report was produced by the Media Intelligence Service (MIS) at the European Broadcasting Union.

For additional information or questions, please contact us at mis@ebu.ch / +41.22.717.22.97 or visit our Media Intelligence Portal <http://www.ebu.ch/mis>

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