

*Early in 2005 Diffusion ran a feature, prompted by the Amsterdam Conference, on public service broadcasting at a time when rapid developments in communication technologies are constantly moving the goalposts and require the managements of public service broadcasters to reflect on their remit and the resources they need to achieve it.*

*Many of you asked us to send you extra copies and we would like to thank you for this clear endorsement.*

*For its second edition in 2005 Diffusion is devoted in its entirety to radio to follow on from the Radio Assembly, held in Copenhagen on the invitation of DR in April, and further to the RNE Rencontre held in Palma de Majorca in May.*

*So, in a nutshell, this edition is about European radio from north to south together with radio from east to west.*

*Throughout the articles in this publication radio proves that it is a dynamic medium. The ratings don't lie: the audiences are listening more and more, and not only on their good old radio sets, but also via their telephones and the Internet.*

*Thanks to its flexibility, its user-friendliness, its simplicity and its local flavour, the radio already holds its ticket for the future.*

*You have a glimpse into that future right here. Enjoy your reading!*

*Patrick Jaquin  
Deputy Head of Communications  
Service*

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# Radio

**Patrick Jaquin**

*Deputy Head of Communications Service, EBU*

## Can we resist everything at the same time?

This spring radio was the hot topic at the 11th Radio Assembly in Copenhagen and the RNE Rencontre in Palma de Majorca. The two meetings tackled the same issue: how can radio stand up to the challenge of finding new listeners in the current digital upheaval?

In Copenhagen Leif Lønsmann, the director general of the Radio at DR, and Per Stig Møller, Danish minister of Foreign Affairs highlighted the role radio plays in every European home by bringing in culture from all over Europe. In Palma de Majorca Ove Joanson, chairman of the SR Board of Directors, presented radio in the same way: "The media of civilized man, the media of feelings, easy to produce, easy to consume and that, owing to its user-friendliness, is somehow forgotten in the broadcasting landscape."

### Here to stay

All delegates felt that over the past few years public service radio had

restructured in all sectors. It has been able to maintain its audience. It is already the most credible of media, so it now needed to stay the best and play an active role in the public debate.

Against this background, will digital cause radio to develop, will DAB increase listening times, will satellite change the landscape, will convergence provide new prospects for development?

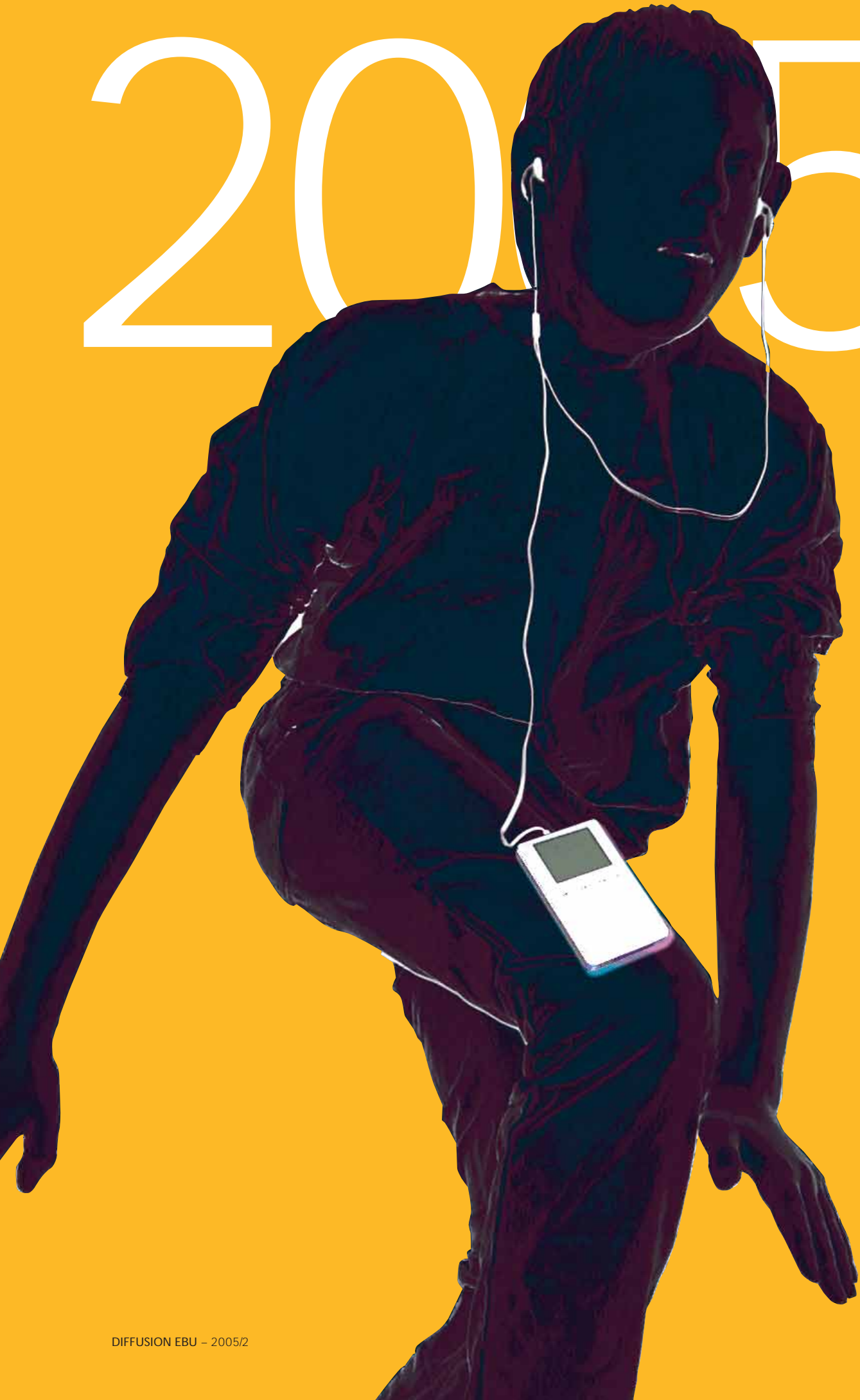
The conclusion from the debates is that radio must adapt if it is to resist convergence and must continue to reconsider its overall approach to the broadcasting landscape (satellite, ADSL, mobile telephony, etc.).

### Let's stay united

It is not possible to fight alone for this public radio, indispensable for democratic society. Nick Kenyon the chairman of the Radio Committee felt that radio was in fairly good health in Europe; nevertheless, he said, "Let's stay united." As Raina Konstantinova, director of the Radio Department, pointed out, "The public service has been under pressure of late, owing to developments in content, distribution, and access."



# 2005



## Imagination!

Radio must play with the world of imagination, which is something the other media cannot do. This intimacy with listeners must be maintained but, above all, radio must dare to dare, and act as a counterbalance to the fast-food radio style because young people, the future listeners of public service radio, are not all the same everywhere. But they are in the majority.

Various formulas were presented at these meetings for attracting the youngest audiences: music, new artists, adapted news bulletins, humour, satire, impertinence, sport, websites, their own language, an image of trustworthiness and competence, a feeling of belonging, interactivity, respect for the listeners, but also the airing of plays, organizing public concerts, etc.

“We need to stand out from the private sector rather than copying it,” was the feeling echoed by Jochen Rausch, Mary Kalemkerian of BBC7, Piotr Kordaszewski of Radio Bis, a hip Polish station, Mark Coenen of Studio Brussel, and Isabelle Binggeli of Couleur 3, a pillar of radio in Switzerland.

Playing the devil’s advocate, Josep M. Marti asked whether it wasn’t better to focus on the older, retired audience who had more money to spend, but immediately concluded that this would be a mistake: the 14-to-25s are the future for radio!

Winning over a young listener today is to gain a listener for ever. Phil Harding (BBC) felt that it was important to maintain the trust of the 25-year-olds, the upcoming parenting generation.

## Developments

The future isn’t just around the corner; it is staring us in the face, with its new platforms that change our way

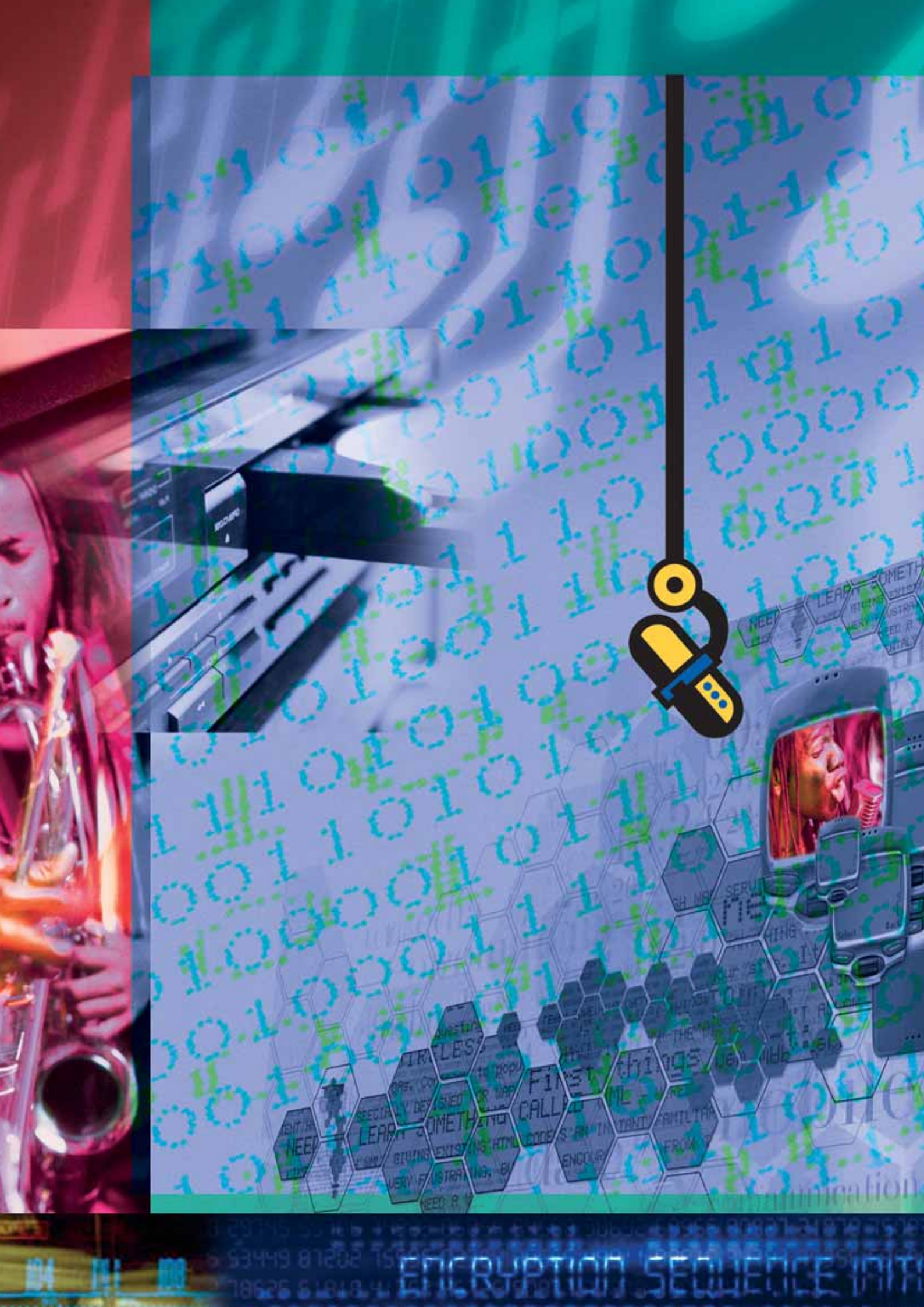
of listening, such as the iPod that young people use to access individualized music. We are faced with a digital feast, a great deal of choice, but is the offer actually increasing? Worldwide, radio is changing, but what about radio managers? With digital, Internet and car navigation systems offering pick and mix services and radio zapping between pre-selected stations, do we need to create radio differently?

What is to become of public service radio in the present technological context? Although often pushed down, radio has always bounced back, stronger and with all its qualities intact. It can now ride the gigantic wave of mobile telephony.

Everyone is in agreement: listeners must be able to find radio everywhere, on all platforms. However, we need to understand the demand of the general public before investing in new platforms: blogs, e-radio (on demand), and not forgetting i-radio (interactive).

Radio is not limited by distance. We can trust in it. More and more stations are springing up but the listener cannot yet truly choose what he wants to listen to or when he wants to do so. So, we need to find a solution to enable him to consume radio with even greater flexibility and even greater freedom.





NEED LEARN SOMETHING GIVING EXISTING INDUSTRY REDACTED DAILY  
SERVICES CALL ENCIPHERMENT FROM  
FRUSTRATING NEED A SOMETHING EXISTING INDUSTRY REDACTED DAILY

ENCIPHERMENT SEQUENCE INITI

# Future

**Raina Konstantinova**

*Director, Radio Department*

## European public radio: well equipped to face the future

In December 2004, the EBU Radio Department and the SIS released an update of the 2003 Radio Study, entitled *Public Radio in Europe 2004 – Market Developments, Audience Trends, Channel Profiles*. Enthusiastically greeted by Members as a comprehensive overview of European tendencies and developments, this report is a much needed instrument for public radio managers in their medium- and long-term decision-making.

Moreover, this joint EBU project confirmed that European public radio is well equipped to face its future. As underlined in the introductory notes, “This report documents the continued strength and resilience of European public radio in the face of technological change, deregulatory pressures and commercial competition. It demonstrates that public radio broadcasters across Europe have embraced these challenges by adapting formats, increased distribution on new platforms and staying connected to their listeners wherever they are.”

EBU radio Members should be grateful to the dedicated SIS team and its leader Alexander Shulzycki for their excellent professional work. Significantly, the results in their study are brilliantly confirmed by another comprehensive work, the British Ofcom Consultation document, issued at the same time and entitled *Radio – Preparing for the future*.

Providing a cross-section of the British radio industry, the document concludes that “The senior broadcaster – radio – is a vibrant and increasingly popular medium. Audiences are listening both to a wider range of stations and for longer in total than they were five years ago. Radio is also at the cutting edge of convergence. Audiences listen to radio not just over conventional sets, but, increasingly, via digital television, mobile phones and the Internet; and there is a growing range of data and multi-media services available over digital radio sets.”

Additionally, DAB radio is showing a potential for growth with 1.2 million home sets in the UK at the end of 2004 and an astonishing 350% increase of sales in Denmark and 500% in Belgium for the same period (data according to PURE Digital). More and more listeners are attracted by DAB not only because of high

sound quality but, more importantly, by more choices and the interactivity it offers.

So the future of radio is here. The original electronic broadcaster has made a spectacular comeback, re-inventing itself and becoming indispensable for modern communication, without losing the charm of its past and with good traditions to build on.

EBU radio Members have been in the forefront of all these developments, including a focused action in support of the public service broadcasting remit. Despite heavy competition and

fragmentation of audiences, surveys show that public broadcasters enjoy the overwhelming confidence of their listeners.

The figures are unambiguous: the combined share of the top public channels in Germany (Nordrhein-Westfalen) is 86.1%; in Austria – 82%; in Sweden – 74%; in Belgium – (Flemish) – 78%; in Poland – 63.9%; in Switzerland – 53.8%; in Netherlands – 45%; in Lithuania – 55.7%; in the UK – 39.6%; in France – 36.6%. Significantly, according to a survey in January 2005 carried out in France about the confidence of the French in the press and media, the

majority of people interviewed (53%) believe that radio is the most trustworthy source of news.

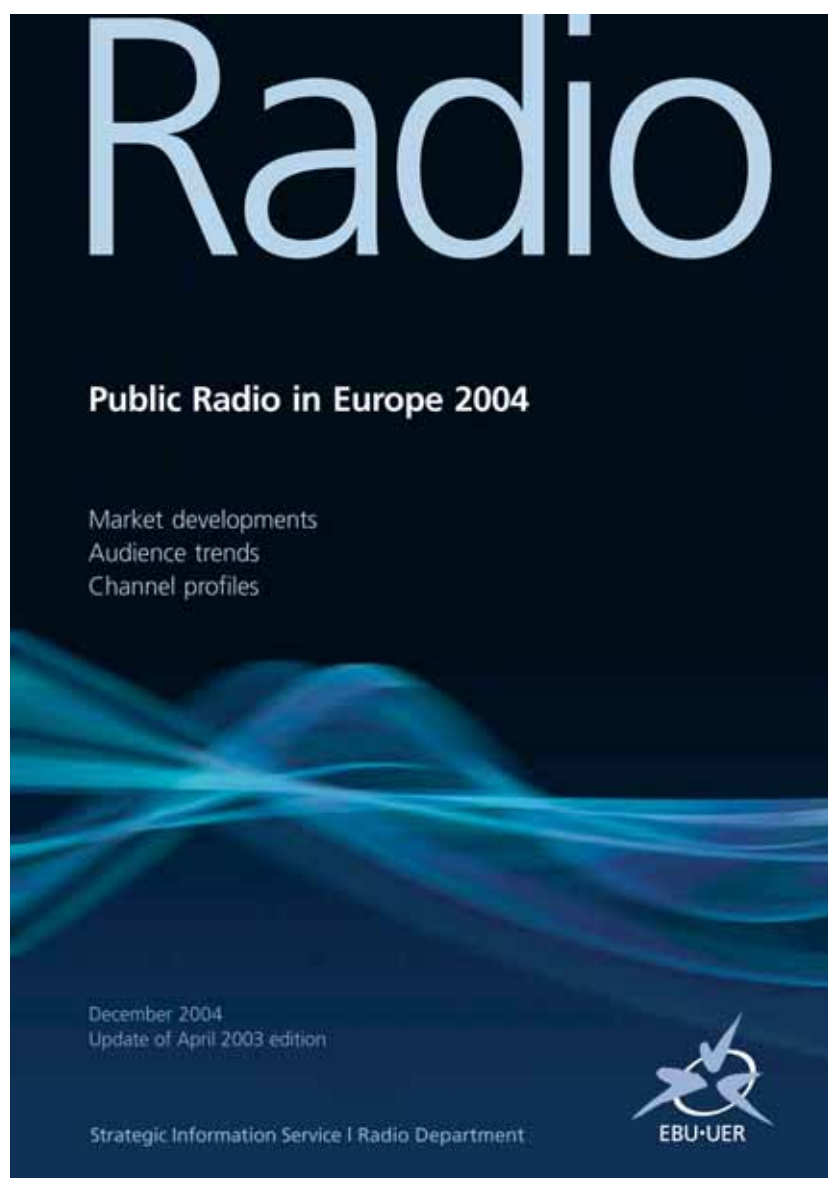
## Boom of Euroradio

Euroradio, the EBU brand which is the uniting link in European radio programming and audiences, has witnessed the biggest ever boost in its development.

Following the successful implementation of the XTradio project for recording and distributing concerts in the form of computerized audio files and the instalment of 50 MusiPOP receiving units, the concert exchange has been technologically revolutionized. The result: spontaneous (pink) offer concerts in 2004 increased to 2,421 and those ordered by Members to 24,793. Satellite transmissions in 2004 rose by almost 30%. Festival offers totalled 906, while jazz concerts offered recorded a staggering 135% increase along with 133% for world music. Live or deferred, these concerts, the best of European talent and cultural diversity, are broadcast by public radio stations in Europe, North America, Asia and Australia, confirming Euroradio as the unique platform of high-quality music programming, reaching a potential audience of 300 million listeners.

Moreover, the EBU radio music exchange is becoming more and more attractive beyond European borders. At the General Assembly in St Petersburg, MPR (Minnesota Public Radio) from the US became an EBU associate Member. In February 2005, the Music Programme Group met for the first time in Washington, hosted by NPR. The very successful Jazz Producers' Meeting took place in Montreal, at the invitation of Société Radio Canada, accompanied by live concerts of the promising EBU European Jazz Orchestra.

Eurosonic, the unique partnership of EBU public radio Members, promoting and supporting pop music, is





now, without a doubt, a real mover and shaker on the European music scene. The Eurosonic Festival in Groningen, the Netherlands, is growing in both scope and appeal. Some 27 young pop musicians, supported by 23 Members, shook the ground of that city for two days in January 2005 with eight huge stages attracting young audiences from all over Europe. Pop music is a highly competitive issue for radio broadcasters everywhere, and we are proud to have every major name in music radio in Europe as part of the Eurosonic network and its listeners. In 2004, pop music offers from Eurosonic increased by 13%, and orders by 9%.

Furthermore, 2004 was a remarkable year for two core radio activities – features/documentaries and local/regional radio. The six-CD box set with the best of features and documentaries, produced for the 30th anniversary of the IFC (International Feature Conference), was a unique EBU contribution to Members' archives and sound treasures, a real event in the radio world. The local and regional radio activity focused on concrete projects, helping two-thirds of European public radio channels find their real voice for people in local and ethnic communities.

EBU News and Sport activities continued to be wherever our Members wanted on-site coverage of events. The small, brave team of three managed to stage and support radio coverage of all big European news events and summits, the G-8 in

Georgia, the US political conventions and presidential elections, the AIDS Conference in Bangkok, Auschwitz, Porto Alegre, not to mention the Eurofoot in Portugal and the Summer Olympics in Athens. The News and Sports Programme Groups, as well as the International Broadcasting Project Group, revitalized their agendas and objectives, becoming true forums for professional debate and working better at cross-departmental level. The efficiency and quality of service improved significantly, resulting in a 15% increase in profit, 15 operations on site, 89 sports offers and 49 news offers.

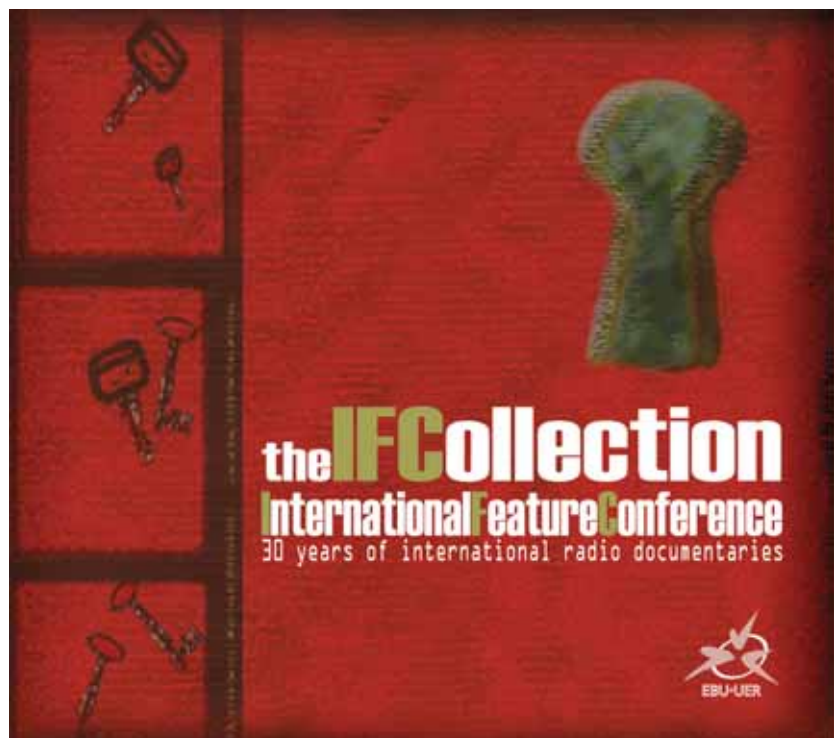
The two major EBU radio discussion forums, the Radio Assembly and the RNE Rencontre, were devoted to two hot topics: Youth Programming and the Global Impact of Public Radio. Hosted by Danmarks Radio, the Radio Assembly was also associated with the 200th anniversary of the great storyteller Hans Christian Andersen. The Youth Programming discussions brought together skilled managers and producers for a sharing

of experience in one of the most creative and sensitive issues in broadcasting. The RNE Rencontre in Palma de Majorca defended its long-standing reputation as a think-tank and reservoir of ideas with high-profile speakers and quality debate.

The EBU Radio Department is now looking to maintain and expand its creative and technological territories. It is, without doubt, the most diverse media outlet on the Continent and will face new and bigger challenges.

The Multimedia Meets Radio annual conference in March 2005 looked into some of them – DMB, podcasting, handhelds, frequency spectrum in the digital age. There are many more – radio sports rights, digital standards regulation, formats and again – content, content, content...

With the huge amount of creative resourcefulness and resolution they possess, EBU radio Members are ready to face their new future.



# Multimedia Meets Radio & TV 2005


EBU Geneva  
22-24 March

TV @ Music

mp3

Invitation & Preliminary Programmes

EBU Radio, Television and Technical Departments



The poster features a futuristic, blue-toned digital environment. A man in a white shirt and blue pants is shown in a semi-transparent, digital form, interacting with a large screen displaying a head with a brain scan. The screen also shows the text 'mp3'. Above the man are three circular icons: 'TV', '@', and a musical note. The background is filled with digital data and light effects.



Javier Tola, head of Radio Sports, News & Int. Broadcasting, Radio Department, EBU



# The Rencontre

**Eduardo Hernáiz**  
*Secretary General, RNE*

## The EBU's premier forum for professionals

The Rencontre was founded in 1973 in Tenerife (Canary Islands, Spain), the same year that Spanish Radio was celebrating its first fifty years of existence.

The theme of that meeting was 'First International Week on Radio Broadcasting Studies'. History shows that upon its inception, the Rencontre boasted an attendance of 83 distinguished radio professionals, auguring not only a successful conference, but one that would make a name for itself over time.

Over the years the Rencontre has become an important venue for those of us working in the world of communications in general and radio in particular. It is indeed an excellent opportunity for radio professionals to discuss freely whatever matters they feel are necessary. That spirit has developed over time in a climate of relaxation and fellowship, hard work and first-rate presentations.

Speaking of the Rencontre in 1989, John Thompson, former radio director at the IBA, said: "What an

extraordinary phenomenon this is! I can think of no other similar meeting that is held within the radio world anywhere in Europe. The mixture of the formal and the informal, of the vague and the precise, is unrivalled by any other regular encounter."

### 2005

In short, the Rencontre is a series of workshops organized by RNE every two years with the invaluable help of the EBU Radio Department management and the support and effective cooperation of an ad hoc working group.

This year's working group for the Rencontre was composed of Bernd-Peter Arnold, Vlado Senica, Christian Maillard, Ann Sandelin, Raina Konstantinova and myself. We were all members of the EBU family at the time the working group was set up, although Bernd-Peter subsequently left radio to join the private sector. I would also like to give my special thanks to two people who carried out key responsibilities in the organization and coordination of the event:

Chantal Portalès in Geneva and Concha Ema in Madrid.

This year's Rencontre was held in Palma de Majorca on 12 and 13 May in the Bit Technological Park, an ultra modern complex of multifunctional buildings that are headquarters to domestic and foreign companies working in data transmission technology and communication.

The main theme of the discussion was the 'Global Impact of Public Radio', including all content. These discussions were entered in a spirit of reflection and exploration of those human concerns which have a potential for radio content. Particular focus was given on the impact of radio that in itself offers the best, most varied content qualitatively and quantitatively; an offer that should meet the expectations of immigrants and minorities, provide national and international information, contribute decisively to a person's overall development and promote civic and democratic values, pluralism and tolerance. In short, it should cover the entire spectrum of the individual.

### Hallmark

By studying facts and figures, we aimed to explore the degree of acceptance of this global radio offer,

# rencontre

which includes a wide range of quantity and quality, and universal social goals, with special emphasis on radio's offer from a qualitative standpoint. In essence, the quality of our offer sets us apart as a public service and as a radio broadcaster at our fellow citizens' service.

We also contemplated a public radio model through which a creative process of constant value is developed, i.e. a project of the future. This project calls for innovations not only in the technological arena, but also in those relating to ideas, styles and formats. The rationale for a greater global impact can only be sustained by the quality and impact of message and content.

A key item discussed in Majorca referred to the qualitative assessment and image that radio stations project on society. Spanish National Radio commissioned an analysis and assessment study from a specialized form, which concluded that the 'new digital radio scenario' has emerged as part of the global impact of information, and offers new qualities, paving the way for new thematic content and services.

This impact would be characterized by the following features: high degree of listener loyalty, enhanced corporate

brand image and corporate culture, contents that foster community spirit and social cohesion while promoting culture in its full dimension, breadth and pluralism and taking the lead in the cultural arena, as opposed to what commercial radio stations can offer.

'Global Impact of Public Radio' served as a basis for six workshops: *Commitment to Public Service Values*; *Evaluation of Public Radio (Parts I and II)*; *Public Radio: Variety and Quality for All. The Offer of Variety*; *Variety and Quality for All. The Offer of Quality*; and *Radio meets Multimedia*. These daily sessions and debates were just as exciting as they have been for the past 32 years.

## Prestigious rendezvous

In 2001 the Rencontre left its permanent headquarters in Torremolinos and became an itinerant event. It was held in Valencia in 2003, and for 2005 we chose one of Spain's most beautiful places: Palma de Majorca. To paraphrase John Thompson, the Rencontre aimed to mix the formal and the informal, business and pleasure, all of this on a magnificent island.

The Rencontre is the exclusive heritage of those who have taken part

in the event since 1973, i.e. all of you, friends and colleagues, who have generously contributed your time, dedication and talent to make the Rencontre what it is today: a venue marked by outstanding participants. If I'm repeating myself, I do so without the slightest hesitation: it is thanks to those who have taken part in the event over the years that the Rencontre has won unequivocal international renown.

Its success and prestige is your success and prestige, from the pioneer members of 1973 (Paolo Valmarana, R. Gressmann, Hugh Pierce, Maurice Hankard, Peter Meggs and others) to the panellists and moderators of 2005 (Ove Joanson, Eduardo G. Matilla, Nicholas Kenyon, Leif Lønsmann, Sergei Kurokhtin, and others).

The Rencontre is what it is thanks to you: a top-notch biennial meeting and the premier discussion forum for professionals of the EBU world.



Bellver Castle, Palma de Majorca

## Radio, a medium as popular as ever

*You little box, held to me when escaping  
So that your valves should not break  
Carried from house to house to ship from ship to train,  
So that my enemies might go on talking to me,  
Near my bed, to my pain  
The last thing at night, the first thing in the morning,  
Of their victories and of my cares,  
Promise me not to go silent all of a sudden.*

Bertold Brecht (Radio Poem)

Radio as medium continues to be not only relevant but as popular as ever, and public radio has held up against increasing competition and new digital media. Although average audience shares for public radio in the major European markets have remained stable and strong over the last two years, public channels in some markets have suffered from pressures of deregulation and technology change – pressures that public radio across Europe will need to face up to.

**Radio is the most used, and the most intensely used medium**

How has radio as a medium held up against new digital distribution

technologies, the Internet, and a host of new personal listening devices?

In a recent study<sup>1</sup> of media consumption in 10 European countries, people were asked how much time they spent reading newspapers and magazines, watching TV, surfing the Internet, and listening to the radio. It turns out that in a typical week, Europeans listen to over 17 hours of radio, more time than any other medium (although TV is a close second).

Usage of radio is not only high but it is also intense. Based on the same study, almost a quarter of nationally representative respondents used radio 25 or more hours in a typical seven

day week. This is higher than all other media including television.

And where is all this listening happening? One interesting trend is the growth of out-of-home radio consumption. On average, listening still takes place mostly in the home (60%),<sup>2</sup> with an increasing percentage happening at work (19%) and in the car (17%). These averages, however, belie extreme national variations. Listening in the car is highest in Italy (47%) and lowest in Bulgaria (3%) but is on the increase in many countries, especially Eastern Europe where the rate of car ownership is rising. Meanwhile, listening at work is lowest for Spaniards (7%) and is highest for Poles and Austrians (23.5% and 27%, respectively).

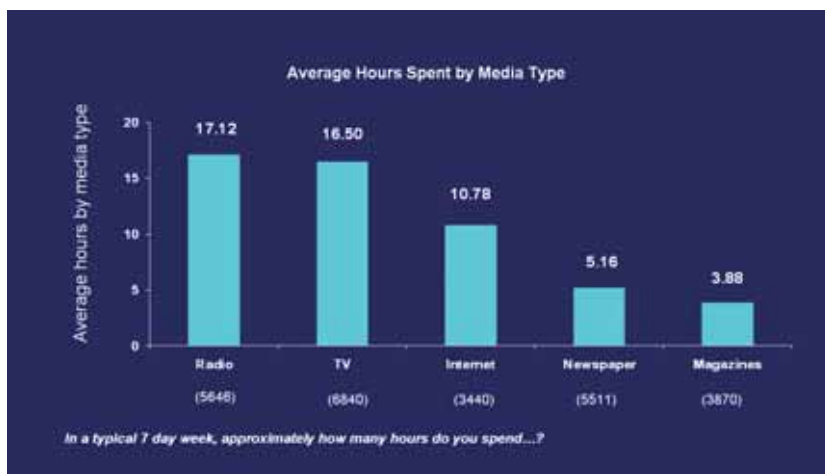
**Public radio retains strong share but some markets show instability**

In terms of audience share, economic contribution, and volume of output, public radio is the cornerstone of European radio. The EBU represents virtually all public radio channels and counted among its membership 779 radio stations in 2003, a number that has been steadily growing over the years.

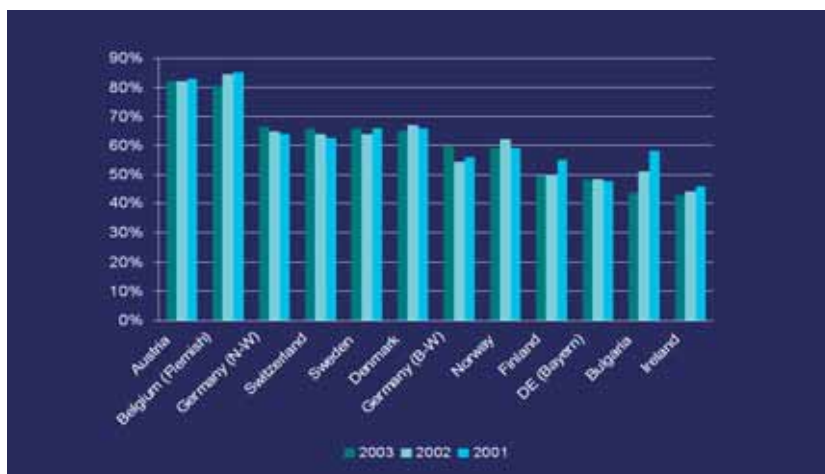
In a recent study,<sup>3</sup> the EBU examined over one hundred of these channels in 20 major markets. The study looked at detailed profile information and output by *genre* and included market developments over the last two years covering regulation,

# European p

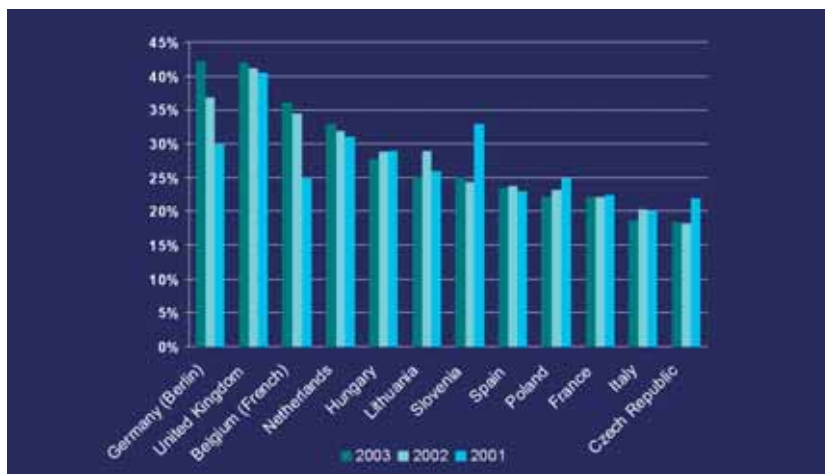
Alexander Shulzycki  
Head of Strategic Information Service, EBU



Time spent by media type



Combined share of national public radio channels – highest



Combined share of national public radio channels – others

audience measurement, and technology. Only national radio was included in the study. Some key findings include:

- From 2001 to 2003 national public service radio channels in the countries under study held stable shedding less than 1% average share to 44.4%. Some markets saw double-digit gains such as French Belgium (+ 11.3%) and the Berlin region of Germany (+ 12.4%).
- In 2003 combined national public service radio shares were highest in the Nordic markets, German-speaking countries and Flemish Belgium. In these territories, shares ranged from just under 50% in Finland to 82% in Austria.
- Public service radio in Eastern countries did experience significant audience erosion. Bulgaria lost 14.1% share and in Slovenia combined PSB share was almost 8% lower. Poland and the Czech Republic saw small losses as well.

The variation of results among Member channels has a lot to do with their financing models and country-specific factors. But a major influence is the degree of encroachment of commercial radio which itself derives from the status of deregulation in any given market.

# public radio

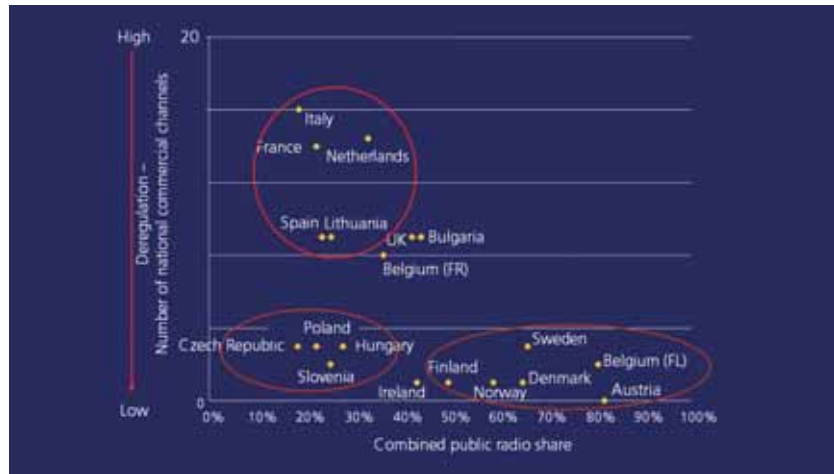
## The challenge!

To position public radio channels according to the level of deregulation in their national markets, we took their combined share and compared it to the number of commercial channels on the market. It's a fair assumption that the more deregulated a market becomes, the more commercial channels will be on air, at least in the early period. What emerges from this comparison is a rather neat set of clusters. The relatively underegulated markets are grouped along the bottom right, high-share-low-competition quadrant. The Nordics and German-speaking territories with Flemish Belgium fall into this category. Meanwhile, the deregulated markets of France and Southern Europe have clearly moved to top-left as they have lost share and face greater competition. The Eastern countries are tightly clustered together at the low deregulation end of the spectrum but achieve below average audience share.

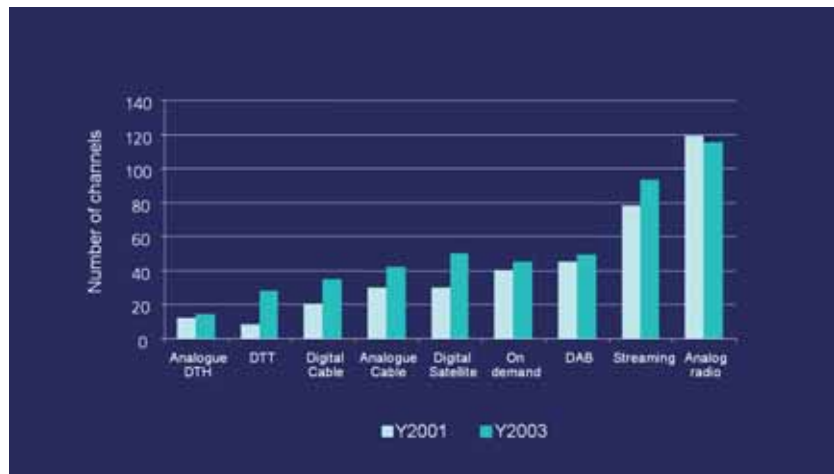
At this point the alert reader may inquire, "Wait a minute, haven't many of these Eastern markets already gone through a stage of radio commercialization? Why are they positioned at the low end of the deregulatory scale?"

Indeed, Eastern European public radio markets represent an anomaly. What may be happening is that strong commercial groups have emerged and consolidated. Indeed, increased foreign ownership and merger activity has characterized these markets from the late 1990s.

It is a cautionary tale for other territories where mergers and consolidation are taking place. In these markets it is important to monitor concession terms, foreign and cross-media holding ownership rules, and the application of competition law to any undue concentration levels.



Public radio share v. level of competition



Radio channel distribution platforms

### Radio distribution over other platforms is booming

Perhaps the most dramatic development over the last two years is the explosive growth of new distribution platforms. For the one hundred or so national public radio channels studied, there has been a 25% increase in their availability on other platforms.

Almost half of all national public service radio channels are now available over DAB frequencies. The greatest increase was in national radio channels available over Digital Terrestrial Television (DTT) platforms. From eight services in 2001, the number nearly tripled to 23 channels. DTT is currently the fastest growing digital platform in Europe.

Public radio channels increased their presence on both analogue and digital cable systems. In 2003, 42 public national channels were available over analogue cable, twelve more than in 2001. On digital cable the increase went from 20 channels to 30. Slow digitization keeps analogue cable an important distribution means.

Over 85% of channels are streamed over the Internet, up from 75% two years earlier. On-demand services also went up from 38% in 2001 to over 43% in 2003.

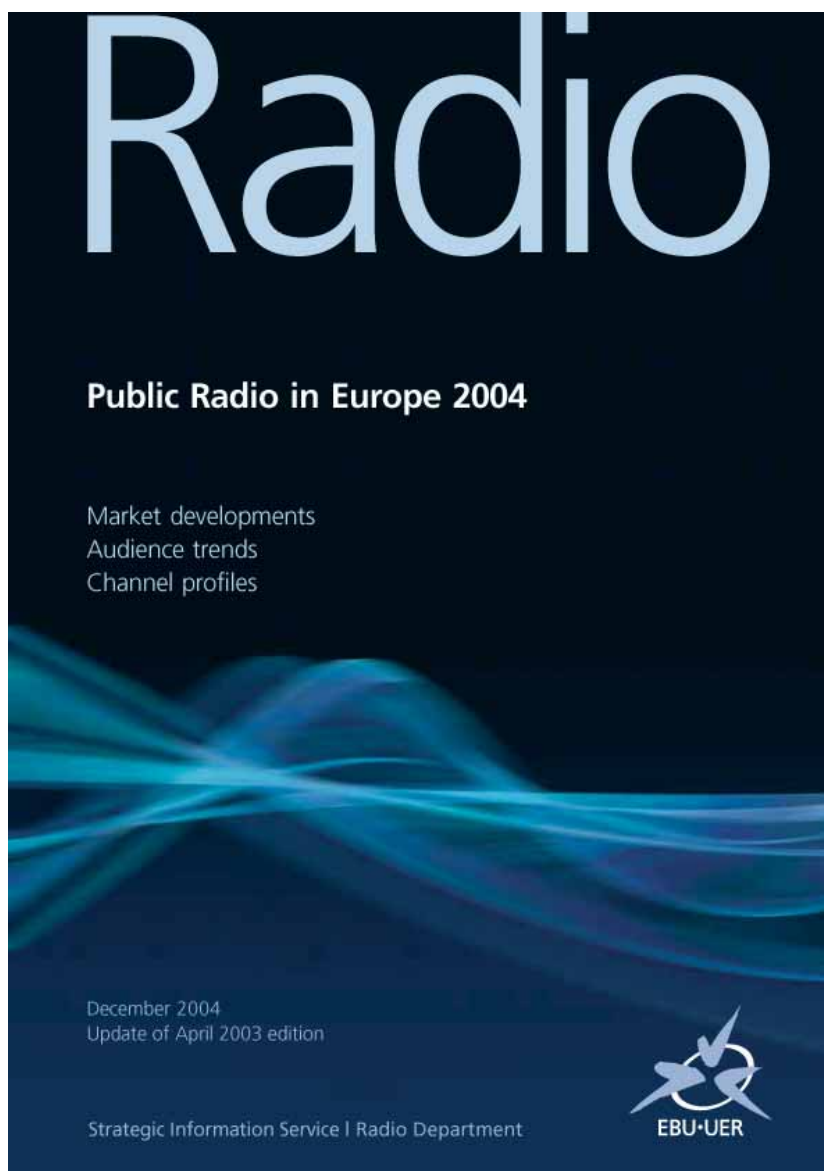
### Challenges ahead

As we have seen, public radio has embraced new technology platforms and has confronted deregulatory pressure, but there are many

challenges ahead. It remains essential to preserve the unique funding model that underpins public radio, but now careful exploitation of new revenue sources and additional funding for new technologies are gaining in importance. Spectrum trading, new measurement systems and many other issues are also beginning to confront traditional broadcasters.

Change is inevitable and necessary but guiding this change and preserving the basic character and function of public radio is a challenge for broadcasters and their law makers and regulators alike.

- 1) *EIAA annual survey of media consumption patterns based on attitudinal data of nationally representative samples from the United Kingdom, France, Germany, Spain, Italy, Belgium, the Netherlands, Denmark, Sweden, and Norway – October 2004*
- 2) *Source: EBU "Public Radio in Europe", 2004*
- 3) *Ibid.*



- *An EBU study*
- *Detailed look at radio market of 20 countries*
- *Profile data and output by genre for over 100 public radio channels*
- *Audience data and four-year trends*
- *Covers **national** radio only*
- *This report is available to all EBU Members at no cost*

# DAB UK

**Ian Dickens**

*Chief Executive, Digital Radio Development Bureau (DRDB), UK*

How has the UK gone from zero to hero in the world of DAB in just five short years . . .

. . . while other countries are only now beginning to recognize the potential of digital radio technology?

There is a fundamental problem inherent in rolling out any new broadcast technology and that's infrastructure cost. It's not like inventing a new way of playing, recording or downloading music (CD, mini-disc, MP3, etc.) which involves a consumer plugging one thing into another and winding up with a new music library. Any new broadcast technology requires a way to get the audio, or video or data from one central location to millions of little receivers all over the country. That means a terrestrial transmitter network, or a cable system or a satellite launched into space. And that's expensive.

Much of Europe is still trapped in the 'catch-22' or 'chicken-or-egg' syndrome that faced the UK in the late 1990s when DAB digital radio was merely a twinkle in the eye of Quentin Howard, the BBC and a couple of pioneering manufacturers. If you're a broadcaster, do you spend money on a terrestrial transmitter network, bid for multiplex licences and create a host of new DAB digital radio services, knowing there is nothing for consumers to buy that will let them hear these great new programmes? Or

- *In 2004, 836,300 DAB digital radios were sold in the UK bringing the cumulative total sales to 1.2 million.*
- *This represents a 178% increase in sales volume over 2003.*
- *The value of the DAB digital radio market in the UK in 2004 was £87 million.*
- *This represents a 148% increase in sales value over 2003.*

do you wait until manufacturers have made affordable products and consumers have rushed out to buy before launching new services and building a robust transmitter network?

Or, do you get clever and recognize that the only way it's going to work is to do both . . . at the same time.

## Government support

The UK benefited enormously by having a supportive government behind the broadcasters' efforts to launch DAB. That's not to say the government was *supporting*, just supportive. There was no subsidy offered to encourage the digital switch to either manufacturers or broadcasters. But there was encouragement and incentive in the form of an automatic analogue licence extension for broadcasters joining a DAB multiplex. And there was strong

legislation in place from an early point which made the rollout of DAB licences, multiplexes and services clear and straightforward.

With this landscape in place, public and commercial broadcasters in the UK realized that the only way to make DAB work was to join together, pool efforts and expertise to encourage chip makers and manufacturers to make new products, retailers to stock those products and then to market all the benefits of the new technology to consumers with one voice. Thus, in 2001, the DRDB (Digital Radio Development Bureau) was born, funded by the BBC and all the major commercial radio broadcasters in the UK and tasked with achieving mass market penetration for DAB digital radio as quickly as possible.

Meanwhile, Quentin Howard and Digital One decided if the horse could not be dragged kicking and screaming

to water, they would simply move the lake. A deal was struck, an investment was made with a unique British company called Imagination Technology and the result was a smaller, cheaper, less power hungry DAB chip which, for the first time, allowed DAB radios to step out of the sacred realm of 'hi-fi stereo'.

Suddenly you could make portable products, you could run them off batteries and you could sell them at under £100.

## New services

Over the next few years more and more manufacturers saw the potential of DAB digital radio both in terms of volume sales, value and market share. Retailers, who had been sceptical about DAB, suddenly realized that they could rejuvenate an audio market that had seen no innovation since the arrival of FM in the 1960s . . . and make some profitable margins at the same time.

Research shows that nearly 70% of people buying a DAB digital radio do so in order to receive new stations. There are 168 different radio brands on DAB in the UK. Of the 418 services broadcasting around the country, more than 50% are only available with a DAB radio. Just broadcasting simulcasts of existing FM stations does not inspire consumers to buy a DAB radio. Better sound quality is rarely an issue given that most people are quite happy with the quality of their FM radio. But offer them something new and unique, something they can't get on an analogue radio and they will rush out to buy.

If you do broadcast an FM service on DAB, there are ways to enhance the digital experience of the listener. Scrolling text is a powerful tool, delivering additional promotional messages, as well as programme supporting data. Because it eliminates the need to remember frequencies,





# DIGITAL RADIO NOW

Your one stop guide to the digital radio world

DAB also means your listeners can find you more easily, can get back to you more quickly and thus builds listener loyalty to your brand.

Now you have a saleable, affordable commodity. You have unique radio services from both the BBC and the commercial sector broadcasting enough new formats to grab the consumer's attention. You have a marketing bureau on the one hand gathering data and using it to promote DAB products to Japanese and Far Eastern brands, and on the other hand talking directly to the consumer about the benefits of a new technology.

## High awareness

Awareness of DAB digital radio in the UK currently stands at 59% of the population (or 29 million adults). Once you have your affordable products, your transmitter network and your unique DAB-only programme content, the next thing to do is tell people about it. Marketing DAB effectively requires cooperation between all the players. Messages must be constant and consistent with no room for confusion in the mind of the listener. So it is important that, as in the UK, marketing campaigns are coordinated. Individual broadcasters can promote their own services, while keeping the generic DAB message in line with that of their competitors. Cross-industry support is essential and, in this respect, a central marketing bureau, such as the DRDB, is invaluable.

Until recently, advertising on DAB digital radio was limited. But with listening figures topping 1 million for some digital radio stations (when listening via digital television is included) agencies and media buyers

are beginning to look more closely at the medium. Although measuring listening to DAB specific products is impossible for now, it can be estimated that with 1.2 million radios in circulation, there are around 2.4 million listeners each week tuning in to DAB stations. With a projected 2.5 million radios in circulation by the end of 2005, that gives a potential listenership of 5 million people. Advertisers take note! And, an aside to broadcasters, research shows that people with a DAB digital radio actually tune in for 21% longer than those listening to analogue radio.

It would be tempting to believe that the job of growing the DAB digital radio market is done, at least in the UK. But a reality check is in order. If 59% of the population knows what DAB is, then 41% don't. If 85% of the population enjoys DAB coverage, then 15% don't. If 836,000 DAB digital radios were purchased in 2004, then more than 10 million analogue radios were sold.

## New technologies

An additional challenge looms in 2005 as we see the arrival of new technologies, such as DMB (Digital Multimedia Broadcasting, which has its roots in DAB and can use an existing DAB infrastructure) and DRM (Digital Radio Mondiale, a digital system for the AM broadcasting bands below 30 MHz) which is seen as a complementary technology to DAB. Digital radios with





Electronic Programme Guides (EPGs) will further change the way we consume radio. Just over the horizon are new broadcast models that could bring data and subscription services to listeners who are prepared to pay for a specific mix of programming. And then there's the mobile phone option!

DAB digital radio has come a long, long way in five years, but there is still quite a journey ahead.



# Neil R

**Tim Bailey**

*Editor, BBC Radio Newsroom; Chairman of the EBU Radio News Programme Group*

## London, Tuesday 12 October, Jack Straw stood up in the House of Commons

The British Foreign Secretary told members of parliament that the British secret service – known as MI-6 – had now officially withdrawn the claim that Saddam Hussein ever had any chemical or biological weapons that could be set-up and fired within 45 minutes.

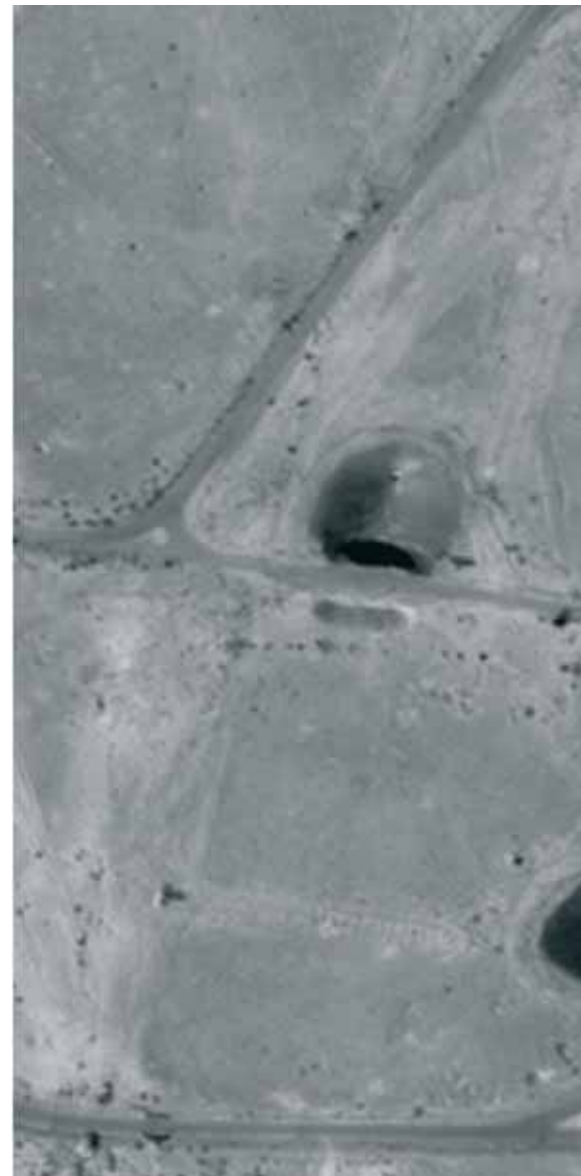
This claim was a vital piece in the British Government's arsenal of facts and figures that they used to try to convince the public that it was right to go to war in Iraq. Well, now it was gone. It is fair to say the statement did not cause that much of a sensation. Frankly, it had been clear for many months that these weapons did not exist. But that evening it was our second story on the main radio news bulletin and the newspapers carried full reports the following morning.

What caught my attention, however, was something else. A listener e-mailed a comment into a current affairs programme not long after

Mr Straw's statement. The e-mailer said that now the 45-minute claim had been withdrawn, could the BBC reporter, Andrew Gilligan, have his job back and could the Director General of the BBC, Gregg Dyke, be re-instated, and could the chairman of the BBC governors, Gavin Davies, be asked to withdraw his resignation. And, in fact, could everything go back to where it was before that whole unhappy saga – known to British broadcasting as the Gilligan affair – unfolded with such serious consequences for all of us in Britain, and in particular, in the BBC. Of course that is not going to happen. One man – a government scientist named Dr David Kelly – is dead, and there is a new regime at the BBC in place and it is moving ahead with its own plans. There is no going back.

### Consequences

One of the main results of the whole business was to set up a review to look at how we carried out our journalism



# Report



© DoD

and to see what needed to be improved and what needed to be changed. The man given the task of carrying out this review was a retired BBC news executive by the name of Ron Neil. He interviewed people inside and outside the organization and after some months produced a report. Now it is clear to everyone in BBC news that the Neil Report is going to be the constitution, the commandments that underpin BBC journalism for as far as anyone can imagine.

The first thing to say is there is nothing very radical in the report. In fact, most of it will strike most people as a restatement of the obvious, a restatement of the very basics of broadcast journalism. But it is clear that for some of our staff, especially the young and inexperienced, there is a clear imperative to remind them of these basics.

At the heart of the report is what is called the Five Journalistic Values:

- Truth and Accuracy
- Serving the Public Interest
- Impartiality and Diversity of Opinion
- Independence
- Accountability

It is now the job of senior and not so senior managers to translate Neil's recommendations and proposals into everyday advice and instructions for our journalists. And this means some very down-to-earth proposals – for a start there is note-taking. Neil says very clearly that journalists should take an accurate note of what a source and contact has told them. The report makes the very blunt point that inaccurate notes lead to lost law cases, if not even worse consequences.

Take another area – dealing with allegations against someone that are broadcast on the BBC. These fall into two main categories. One is where the BBC itself makes an allegation against someone, probably as a result

of its own investigative journalism. Then there are other situations, much more common, where someone appears on the BBC and makes allegations about someone else. Neil says we should deal with these by applying basic journalistic common sense. We must question the credibility of the source of the allegation and make sure that we give the subject of the allegations the right to reply.

The report also highlights another key point. That is the reaction of the audience to an allegation broadcast by the BBC. Whether we like it or not, by broadcasting the allegation we give it power and credibility. And because the audience trusts us, more often than not, they think it is the BBC making the allegation. We must deal with this reality. We must test the story with great vigour.

And there are the question and answer broadcasts, known as 'two-ways'. This section of the report no doubt springs directly from the infamous 06:07 broadcast on the morning show on BBC radio by Andrew Gilligan about weapons of mass destruction. Neil is quite clear – when the BBC is breaking stories containing serious or potentially defamatory allegations, live two-ways are normally inappropriate. And where there are serious or potentially defamatory remarks in a two-way, it must be scripted beforehand.

However, perhaps the biggest cultural change in BBC news to emerge from the Neil Report deals with complaints. There are a total of 18 bullet points dealing with complaints alone in the report. They come down to one clear measure. We must improve how we deal with complaints. We must be quicker in our response, more sympathetic, and more honest.

So what are we going to do about it all? Well, the BBC does not do anything by halves. And the main focus for most of the staff is on



*Weapons seized by US forces at Najaf, Iraq*



training. This training is taking place on a low level, among producers and reporters in their own programme areas. This is already underway and will continue for some time.

## What next?

At the heart of the Neil recommendations is something much bigger, much more ambitious. This is the establishment of a college of journalism. This would bring together the training needs of all parts of the BBC news – some 7,000 people. Not surprisingly this has caught the eye and the imagination at home, although no-one is quite sure what it means. It may be that the course is situated in an existing university; it may be conducted as part of an enlarged existing training course within the BBC; it may be situated in a brand new campus.

Senior journalists within the BBC have always thought that the corporation's basic principles of fairness, impartiality and political balance were well known and understood by the staff. What Neil discovered was something very disturbing. Quite a few of our youngest – and brightest – people knew the words. But they were ready to admit to not knowing what the principles actually meant and how they affected their programmes in everyday broadcasting.

The post-Gilligan process within the BBC has been very painful in many ways – there already has been much rewriting of the history of what happened and why it happened; who was to blame; who was right all along. But quite a lot of positive attitudes have also been revealed. I honestly think the Neil Report and its proposals will turn out to be one of the positive aspects.



© DoD

*US Marines patrol at Fallujah, Iraq*

# IREN

Peter M. Lewis

Scientific Coordinator, IREN; Research Fellow, London School of Economics

## Out there, in everyday life, nobody talks about radio

If you are a radio broadcaster or someone who has specialized in the academic study of radio, it is difficult to accept this because radio is listened to as much as ever, the medium holds its own against television and other leisure pastimes.

In focus groups or interviews people speak eloquently about the importance of radio in their lives. But ordinarily radio is not a subject of conversation, like television. “Did you see...?” – rarely does the question next day about the previous night’s programme apply to radio.

What radio moments compare with the images of 9/11?

With radio, silence is more memorable – the silence that follows the commentator’s last, appalled stutter in Welles’s *War of the Worlds*, or after the nuclear bomb in the BBC adaptation of Raymond Briggs’s *When the Wind Blows*.

### Visual

Most Europeans live in a visual culture, our very languages permeated with expressions that relate to sight, a culture that has evolved over centuries since the invention of printing prioritized visual over aural skills.

Listening to radio is so interwoven in people’s lives it has become a habit like eating or opening a window. Something similar applies to this experience that occurs *inside* our heads. It is part of us, we own it – “my station”, “our tune” – and we don’t necessarily want to share this private experience.

Does this matter? Does it matter that though words are what radio uses above all else, it is as if there are no words to describe what radio is about? That, to use academic jargon, radio lacks a discursive presence?

In a growing number of universities in Europe, there is a feeling that this discursive absence contributes to radio's invisibility at policy levels. That when it comes to the allocation of resources, or to legislation to ensure diversity, there is no background of theory or debate on which policy-makers can draw. And since the media themselves strongly contribute to the formation of public opinion and hence policy, we can ask "How do the media treat radio?"

The answer is "not well". Critical attention in the press is sparse compared to that devoted to the theatre, film or books, while television's rare excursions simply show that the TV researcher's list of contacts don't go beyond celebrities.

A number of radio experts are trying to change this situation, believing that radio is an art form, a source of information and entertainment and a means of involving citizens in the public sphere. As such it needs a background of critical study and research if it is to flourish.

Within the growing field of media, cultural and communication studies, interest in radio has been slow to develop, but has gathered pace in the last few years. To develop, a subject field needs to create networks, seek funding, organize conferences, find publication outlets. This activity results in the introduction of syllabuses whose presence in universities should begin to affect what is taught in schools: listening is an art also, one whose enjoyment is enhanced if the experience can be given some historical and cultural context.

In Scandinavia, a Nordic Radio Group has been in existence for some time; in France GRER (Groupe de Recherches et d'Études sur la Radio – <http://greriren.free.fr/grer.htm>) has held two international colloquia; in Italy the University of Siena has been the focus of academic interest in radio

with a conference and radio summer schools, the second of which, an international event, takes place at Siena in the last week of July; in Britain the Radio Studies Network (<http://www.radiostudiesnetwork.org.uk/>) was formed in 1998 and has launched a journal devoted to radio (<http://www.intellectbooks.com/journals/radio.htm>).

In countries where there is such a presence, researchers who are often marginalized in media studies departments can find contacts, cite precedents and apply for financial support. It is much harder to maintain an academic interest where a scholar is isolated and there is no network.

The International Radio Research Network (IREN) applied for funding to the European Commission to create a research infrastructure at a European level, and especially to reach younger researchers and those in eastern and southern Europe. The application was approved and the 30-month project launched in March 2004 with a programme of conferences and with plans to form an international membership association which will outlast the funded period and be a permanent source of encouragement and support for radio study and research.

## Internet

Thirteen partners from 10 countries are the founding members of IREN. Among their main tasks are to map academic research projects and competencies concerning radio across Europe, entering the results in a database accessible through a website, to identify fields of collaboration across disciplines, between universities and with broadcasters, particularly with regard to radio's capacity to encourage citizen participation in the creation of a European public sphere.

Dialogue with broadcasters is as an essential pre-condition for successful



academic research. Of course industry structures and programme formats can be studied without going near a radio station. We can, and do, talk to listeners. But our work is enormously enriched if we can relate it to the intentions of programme-makers and schedulers, and if we can observe the ways broadcasters work, or reach decisions (for example over new technologies), or how they conduct and interpret audience data. In short, academic researchers need access.

### The benefit?

Why might such a dialogue benefit broadcasters? There are two main points of possible connection: study and research. It would be useful for broadcasters to know what universities are teaching their students in media studies and journalism departments, more so if they could also assist in ensuring that relevant knowledge skills are taught. In fact, many university courses benefit from the presence of broadcasters as part-time or visiting lecturers – and two of the IREN founding partners divide their time in just that way. But university radio study should be more than training. It is here that the ground should be laid for that critical

discourse whose absence is apparent. It is not as if broadcasters themselves lack the capacity to reflect critically on their work. Quite simply, they do not normally have the time.

This is where the second point of connection, research, can help. Sometimes it can benefit an institution to have an academic researcher present for a limited period to ask questions about procedures, agendas and working assumptions. More commonly, a comparison of research needs will identify areas of mutual concern on which academic research can shed light. A visit in the other direction is something offered at my university, the London School of Economics, to broadcasters or journalists which allows them space to reflect on their work in an atmosphere removed from everyday pressures.

An obvious arena for collaboration is the conferences both parties organize to review their work. The presence of a broadcasting panellist at an academic conference, or, conversely, of an academic at a broadcasting conference is guaranteed to provoke debate. And it is out of debate and dialogue that a shared discourse can emerge.

### Contacts

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*International Radio Summer School, Siena: [www.radiouniversity.net/in](http://www.radiouniversity.net/in)*  
*Radio Studies Network: [www.radiostudiesnetwork.org.uk](http://www.radiostudiesnetwork.org.uk)*

# Cred

Patrick Jaquin

## The French, radio, television, and the Internet

The French have a fairly marked interest for the media, whether it be the press, radio, or television. And this interest is getting stronger (72% in January 2005 compared to 71% in 2004).

Those with the most enquiring minds are men, aged from 35 to 49, executives and professionals, and those with higher education. This curiosity is the same for those on the political left and on the political right.

### Radio and television

Though 53% of listeners consider that events really do happen as reported on the radio, or more or less, but 43% think that there are probably quite a few differences between how events happened and the reports, or that they probably didn't happen at all as reported on the radio.

This latter view is on the increase (+5% in comparison with the 2004 survey).

Women generally trust radio more than men: 54% of women believe

what they hear, compared to only 44% of men.

The most trusting listeners are in the 18–24 age range and the most sceptical in the 35–49 age range.

Executives and professionals (59%) trust radio the most and intermediate occupations the least (48%).

The higher their level of education – baccalauréat or higher education – the more the French are likely to believe what they hear on the radio (57% and 55% respectively) and the lower education categories (BEPC, CAP, BEP) have the greatest doubts about what they hear (46%).

Political preference doesn't affect the results. On the left 56% were trustful, compared to 55% on the right.

As for television news reports, viewers who believe that events really happened the way they are shown or roughly the way they are shown are not in the majority (45%) and this tendency to be suspicious is on the increase because the figure has dropped from 47% in 2004.

Furthermore, the idea that there are probably many differences between the way in which events happened and the way in which television showed them, or that what is shown probably never happened at all, has gained ground by 3%: 51% in 2004 and 54% in 2005.

Men are the most suspicious: 56%. In the 18–34 age range, 57%; executives and professionals, 64%; left-wing voters, 58%; and those with further education, 64%.

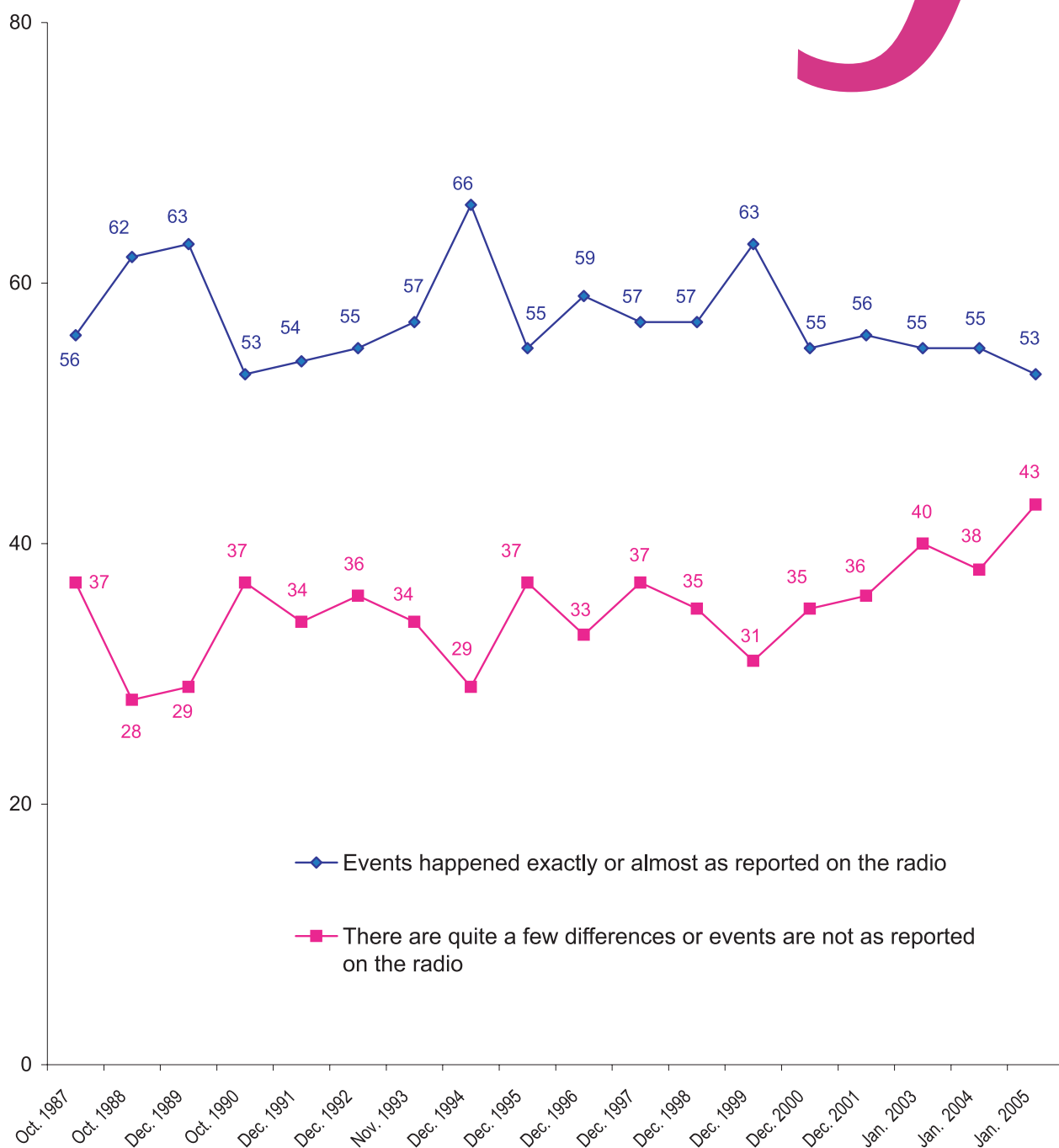
### Internet

The Internet has still to prove itself. Of those surveyed 57% do not hold any opinion of the news they read on the web.

Only 23% of those surveyed think that events happened just as shown on the Internet or more or less, followed closely by the 20% who think that there is probably quite a large difference between the way events happened and the way they are shown on the Internet or who think that events probably did not happen at all as they are shown on the Internet.

The most credulous are young people from 18 to 24 and the least trusting are those of 65 and over.

# credibility



Changes to the credibility of radio as a source of information (survey for Le Point - La Croix by TNS-Sofres)

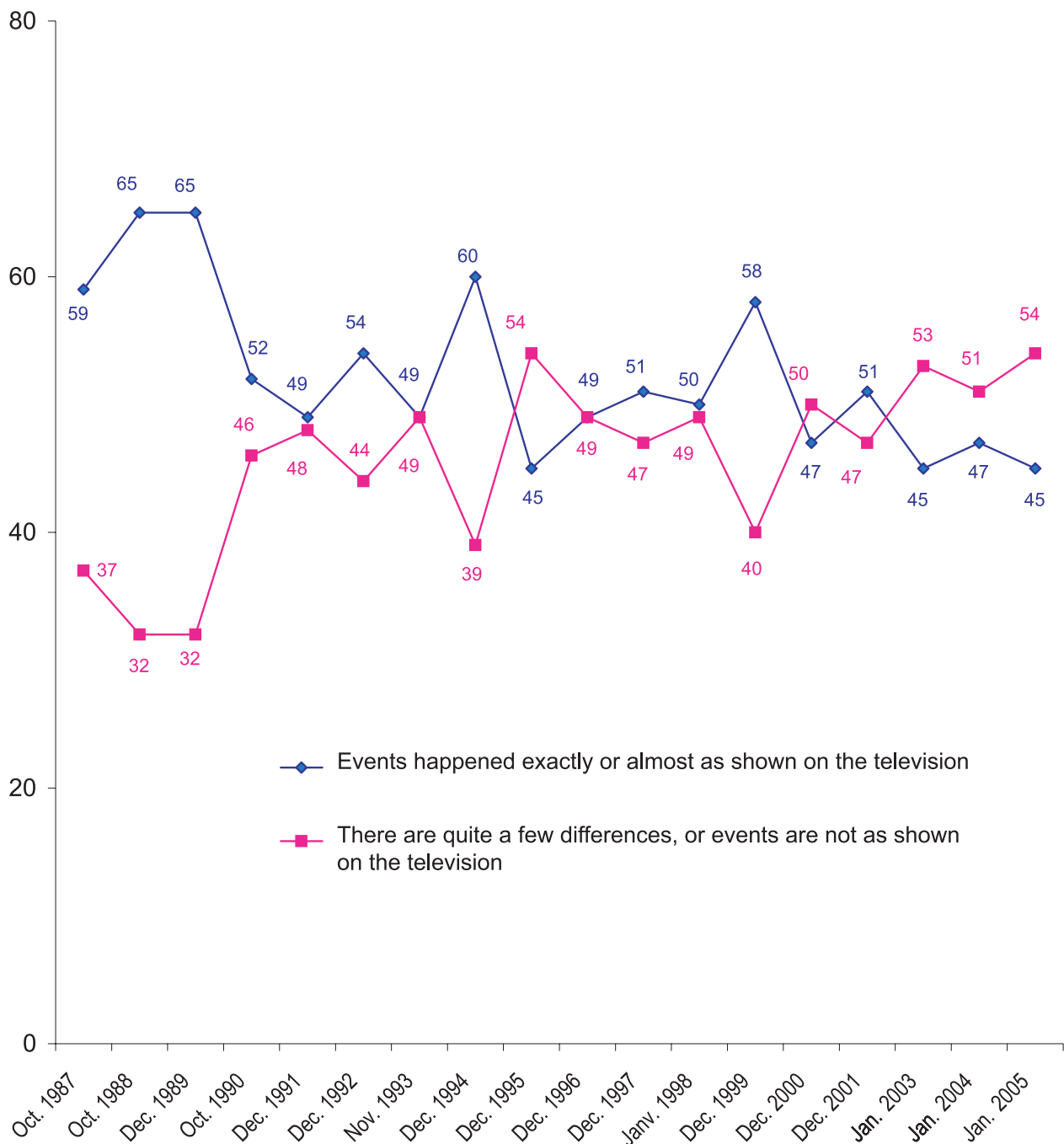
## Major events in 2004

In fact the French generally consider that the media provided proper coverage of the tsunami in South-East Asia, Turkey's application to join the EU, the Athens Olympics, the 60 anniversary of the D-day landings (100%) and the Madrid bombings.

On the other hand, they felt they were close to saturation on the media coverage of the first gay wedding in France or on the law against wearing religious symbols in schools.

*Survey carried out for Le Point and La Croix / TNS Sofres, on 26 and 27 January 2005 out of a representative*

*nationwide sample of 1,000 persons aged 18 and over, interviewed face-to-face in their own homes by TNS Sofres pollsters. Quotas (sex, age, profession of head of household) and stratification by region and city category.*



Changes to the credibility of television as a source of information (survey for Le Point - La Croix by TNS-Sofres)

# Radiophiles

Patrick Jaquin

Profile of the French  
radiophile



Médiamétrie\* has just brought out a 'two-in-one' (the '75000 Premium') study for France in which it is possible – for the first time ever – to decipher, in minute detail, the behaviour of radio listeners and their consumption habits.

We learn that the tribe of radiophiles consists *inter alia* of the 85% of thirteen-year-olds and over, who listen to the radio on any day during the week, of people who drive station wagons, play football or take winter holidays in sunny climates.

The data is from two sources, firstly, a radio panel studying listener

behaviour over a three-week period, comprising over 300 targets which are gone over with a fine toothcomb: income, personal assets, leisure activities, music, shopping, household equipment, centres of interest. Secondly, for the first time in 2004, the panel's 'Premium' information is merged with that from '75000+'. It is this new study, '75000 Premium', which provides these hitherto unpublished revelations about the radio audience.

**Bobo\*\***

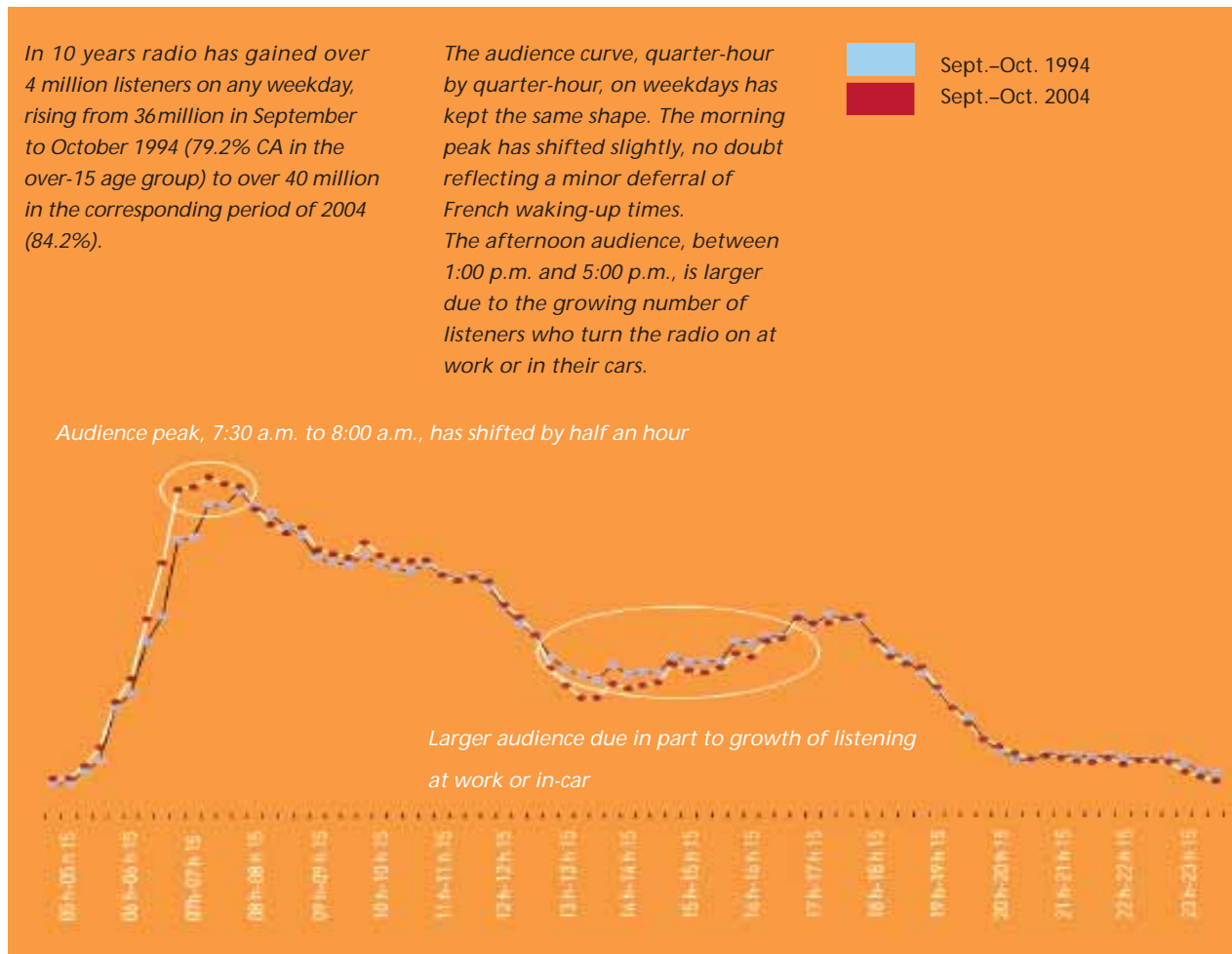
Let us take an example. Over 90% of people with good living standards,<sup>1</sup> and nearly as many among mortgage

holders or shareholders, listen to the radio. Radiophiles have got more money...but how do they spend it?

Ninety per cent of car drivers turn on the radio on any weekday, against only 76% of pedestrians...9 out of 10 station wagon drivers and convertible coupés listen to the radio on any day during the week, but for shorter periods (2 hours 30) than saloon car drivers (over 3 hours).

**Car, leisure, radio**

Radio listening depends both on the driver's age and on the vehicle's age. The newer the car, the more radio is



Audience quarter-hour by quarter-hour (%), 15 years and over, Monday-Friday. 75000+ Médiamétrie

listened to: nearly 90%, compared with 84% whose car is more than three years old. As is only logical, given that today it's hard to buy a car without a radio!

The study also reveals the time slots and stations listened to or pre-selected by these radiophile drivers.

Radiophiles likewise devote a bigger budget to leisure activities. Holiday-makers, especially the winter sun-seekers, and those who holiday more than twice a year in France or abroad, are among the inveterate radiophiles. And when not on holiday, many of them go out: 90% of those who spend time at places of entertainment

(concerts, theatre, opera, dance), museums or sports events, and also of regular cinemagoers,<sup>2</sup> listen to the radio on any weekday.

## Consumers

Being loyal to radio does not rule out the use of a game console or a PC: on the contrary! Nine people out of ten who have bought more than six CD-ROMs, video games or DVDs during the previous twelve months, or more than five music CDs in the previous three months, have also listened to radio on any weekday.

\* *Article based on the conclusions of the '75000 Premium' survey.*

\*\* *Bohemian bourgeois*

- 1) *People with a household income over €3,000 per month.*
- 2) *People who visit the cinema at least once a month.*

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Radio

# wakes

Patrick Jaquin

## More and more people in France are waking up to the radio

Half of listeners tune into the radio during the week before 7:30 in the morning, whereas it isn't until 2:00 o'clock in the afternoon that that many viewers have turned on their television.

Thirty-seven per cent of the audience start listening to the radio within 15 minutes of waking up and many prefer the familiar tones of their chosen radio station to the sound of an alarm: three out of every four households are equipped with a radio-alarm clock. Some families have more than one, as there's an average of 1.3 radio-alarm clocks per household.

### Morning call

According to a Médiamétrie\* survey there is a category of listener called

“waking listeners” who say they listen to the radio within 15 minutes of waking up. The listeners in this category represent more than one-third of the French population and actually have quite a lot in common.

First of all they are early risers: almost all of them have already turned on their radios before 8:15. Without them, audience figures would follow a somewhat . . . er . . . sleeper curve.

During the week, more than half of those 13 years and older are awake before 7:15. Two-thirds of the French population in this group wake up between 6:00 and 8:30 during the week. If we consider the average waking time during the week people get up earliest on Tuesdays, Thursdays, and Fridays (7:12). Conversely, on average they rise latest on Wednesdays and, to a lesser extent, Mondays.

And this is quite logical, when you think that people don't go out to work as much on those days. You need only consider the time people get up to go to work and compare it with the time of those who don't have to: 6:49 on average in the first instance; 07:54 in the other. Those who don't need to go to work give themselves over an hour more in bed. These differences are obviously reflected in the audience curve. The “waking listeners” are therefore, during the week at least, early risers. And the similarities do not stop there.

The survey profile of “waking listeners” reveals that they are usually men between 35 and 49 years, who go out to work and belong to a higher socio-professional category, city-dwellers, in particular those living in the greater Paris area. While they tune in earlier, these “waking listeners” also stay tuned for longer, half an hour more than the others on average: 2 hours 55 minutes, compared to 2 hours and 25 minutes. And – this will come as no surprise – while they represent over one-third of daytime listeners (37%), they also constitute

43% of the mass of large radio consumers. These radio fans are also more likely to tune in during the day.

## Zappers too

There's no surprise therefore that they are more likely to zap from station to station: 1.8 on an average week day between 5:00 a.m. and 5:30 p.m. as compared to 1.6 for other listeners.

At the weekend it's obviously another matter. The study shows which station they listen to when they get up. Almost half (45.6%) listen to a

general-interest station but a third (32.6 %) wake up to a music station. Theme stations (France Info, for example) are chosen by more than one in ten. And 9% prefer local radio.

To summarize we can define the “waking listener” as Mr More: he's more likely to get up early, spends more time listening to the radio, tunes in more often, and to more radio stations. Do early birds catch the worm listening to the radio? Whatever the case, these “waking listeners” are the key for the radio economy.



## Radio junkies

The 13–24 age range is the sector that's the most hooked on radio. A total of 91.6% listen to the radio during the week, as compared to 83.7% of the whole population above the age of 13. This strong addiction has repercussions on the number of radios owned.

Having a person in the 13–24 age range in a household is an amazing catalyst for the purchase of radio equipment: whereas on average a French household has 5.6 radio

receivers, the number rises to 7.6 in those homes with someone between the ages of 13 and 24.

Not only are young people the motors for owning radio equipment but their influence extends to the quality of receivers: whereas 75.9% of the 13+ population have a programmable radio, the proportion rises to 87% in the 13–24 age group.

The main receiver they tune in on is their stereo unit (50.4%), whereas the traditional radio-cassette player or radio-CD player is the radio of

preference for 22.5%. As for the walkman it would appear to be reserved for listening to CDs: the 13–24 age group doesn't use it much as a radio (only 3.4% use it as their main radio).

*\* Médiamétrie survey carried out from January to March 2003 among more than 18,000 French subjects aged 13 years and over as part of the survey '75000+ Radio'.*

# Disasters

Michel Meyer

Deputy Director and Network Director, France Bleu, Radio France

## France Bleu in close proximity to joys and sorrows

In 2003, the France Bleu network consolidated its position in France as a major radio channel, now visible in a national radio landscape in which, thanks to the Internet, the “web effect” has become a prime factor. Today, anyone listening to a local station, anywhere in France, can participate in real time in the life of their region while keeping a finger on the pulse of the wider world thanks to the ever-watchful journalists at the France Bleu network centre.

Everything is now everywhere on our airwaves: “local” and “global” combine into a sort of “*global*”, but without altering a single strand of the social bonding effect of the coverage of intensely local concerns which is still, more than ever, our *raison d’être*. This is a considerable asset vis-à-vis the competing general-interest channels, whose strictly national vocation often leads them to speak with the same voice.

### In close proximity

Thanks to this configuration, France Bleu finds itself closer to both the joys and sorrows of the regions of France, all the more so when disaster or tragedy strikes (floods, accidents, fires, natural catastrophes and so on). This shows that it was essential that

on the basis of a close collaboration with Civil Defence, the France Bleu stations should assert themselves as the country’s “crisis radio”.

This was the case in 1999, on the occasion of the terrible storm at the end of December, or again during the ecological catastrophes following the sinking of the *Erika* oil tanker in 2001 and the oil slick caused by the *Prestige* in January 2003. It was the case again, at 19:00 hours on 23 February 2004, when an earthquake caused a total black-out in Besançon, forcing the mayor to make his way across his own city to France Bleu’s studio in order to find out what was going on.

On each occasion, the stations of Radio France shone. The telephones were down. Only the radio was still working. The prefectures were snowed under and the official services submerged, but the reporters were everywhere on the job in the towns and villages facing difficulties, with the helpless listeners at home, tuned to one of the 43 stations. The transistor once again became an essential gateway to the rest of the world, making it possible to allocate assistance and donations to those affected by these disasters. The France Bleu network

clearly upholds the tradition of human solidarity.

In order to fully understand the essential function performed by the stations in the France Bleu network today, it is enough to listen to Gabriel Valdisseri who, under the aegis of Christiane Chadal, Radio France’s Delegate for the Mediterranean South region, guided the activities of the Nîmes station during the freak floods of autumn 2002.

This crisis radio accompaniment, stretching over more than three weeks, began with the first rainfall: “When the rain started,” Gabriel Valdisseri recalls, “the main Alès-Nîmes road had not been closed by the authorities. In fact, an hour later, more than 100 vehicles were trapped, with water half-way up the doors, at the roundabout of La Calmette, a small locality just before Nîmes. All the mobile phone calls from stranded people converged on France Bleu Gard Lozère. Those who weren’t too far away even found refuge there! Throughout the night, France Bleu’s team took it in turns on the air to provide company, reassurance and information on the resources being deployed to come to the aid of those stranded.

“The mobile phones gradually ran down and fell silent. That night, over 1,500 people were immobilized on the roads of the Department of the Gard and in the midst of torrents of mud, their only lifeline with the world was our coverage on their car radios.”

# situations

## and radio

The increase in the number of natural or technological disasters, frequently with drastic consequences for the victims, has revealed the pressing need to develop the provision of information to the population by radio in the event of crisis situations. Radio, in fact, has an essential role to play in this area, both in relaying the instructions from the authorities on the behaviour to adopt before and during a crisis and informing and assisting the authorities and disaster victims in order to speed up a return to normal.

With this in mind, the Ministry of the Interior (Civil Defence and Security Directorate) decided to approach Radio France with a view to strengthening cooperation in this area.

*This approach corresponds to three goals:*

- further develop the dissemination of instructions for *preventive action to take and behaviour to adopt*;
- make it easier to set up *radio services for crisis management and public contact dedicated to all types of risk*;
- and create a real *partnership* between the prefects – at zone and department level – and Radio France.

The first significant measure was the conclusion of a nationwide agreement laying down the conditions for a partnership between the Ministry of

the Interior, Internal Security and Local Freedoms and Radio France.

In addition, an exchange of information took place on the location of the sites coming under a specific intervention plan and the coverage areas of Radio France's transmitters.

Finally, the decision to jointly draft a guide for the relevant services in the prefectures and France Bleu's local station heads constitutes a milestone in relations between the public authorities and the broadcasting services.

*This approach is aimed at reinforcing mutual cooperation which ought not to be confined to the crisis period alone, but should cover all situations:*

*- before the crisis:*

- ensure all actors and organizations know each other and each other's working methods;
- improve the understanding of the complexity of decisions to be made in a crisis situation;
- educate and make the population aware of the instructions concerning prevention and conduct;
- carry out forecasting and planning work;
- ensure the presence of journalists at training exercises.

*- during the crisis:*

Radio France, through the intermediary of one of its stations,

serves as a link between the authorities and the population. It relays the authorities' instructions and carries out a general information remit.

*- after the crisis:*

The link established between the authorities and the population continues after the crisis with the aim of restoring a normal situation.

Radio has an important support role in accompanying the disaster victims in their various transactions, specifically their dealings with the administrative authorities, and allowing them to present their testimonies on the air.

Radio is also to be associated with the debriefings. The participation of radio crews at these sessions, not only as actors but also as witnesses, should help make these actions to safeguard the population even more effective.

Previous debriefings have shown, in particular, the need to set up crisis-dedicated radio channels or special programme sessions.

To be usefully and foreseeably available when the unforeseeable occurs, has been, and remains more than ever, radio's central, re-discovered vocation.

# LR2

the

**Uldis Duka**  
*Director, LR2*

## LR2 – the only Latvian music radio channel in Latvia



Established in 1995 by Latvian Radio (Latvian public radio, LR), one of LR2's main objectives was to create an entertainment programme service targeted at a young audience. Initially it had an allocated airtime of 8 hours per day (from 4:00 p.m. to midnight), filled by dedicated talk programmes and various kinds of music. A year later the airtime was extended to 12 hours (noon to midnight) but the network frequencies had to be shared with the (integration) channel that targeted ethnic minorities.

In 2000 LR2 became fully fledged with its own production facilities

working around the clock, however, its network was only able to cover a 60km radius around the Riga area. Up to 2002 coverage of the rest of the country was made possible by sharing the “integration” channel’s network.

A bank loan of €50,000 to pay technical staff and freelancers made it possible to expand production facilities thereby allowing the channel to be on air 24 hours a day. The strategy was that the increased commercial revenue would generate a return on investment, and this turned out to be case.

### Creative output

Alongside technical developments, creative output also changed. Way back in 1997 half of the airtime was filled by popular music in Latvian, but the Broadcasting Authority, despite its reluctance, allowed LR2 to abandon foreign music and the channel came up with the idea “Sing along in your native tongue!”

Today a format like LR2 is quite unique in the European public

broadcasting landscape: a channel dedicated to songs produced in Latvia and sung in Latvian. Though programming includes diverse styles and covers several epochs, it mainly concentrates on current pop music as well as news, culture spots, sport, business, etc.

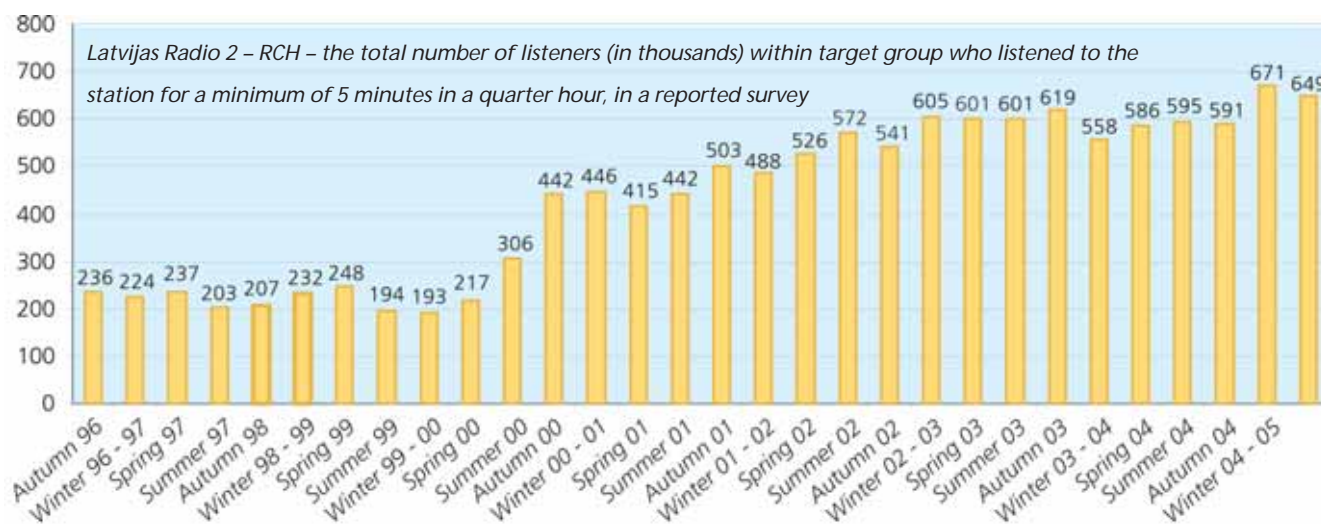
Indirectly LR2 has had a serious impact on the Latvian music market. More music records – and of higher quality – are now being produced. If a decade ago the choice of Latvian music was limited, it is no longer the case today. Ironically, Latvian commercial broadcasters which had previously neglected local pop music now pay more attention to it since its success on LR2.

The audience share of LR2 has soared from 4% in 1995 to 24% in 2005. This success is down to its staff whose numbers remain relatively modest: 8 full-time employees and 17 freelancers, and only 2 technicians. Today, 43% of LR2’s audience is in the 35–54 -age group, with a high proportion of women (59%).

### Romantic

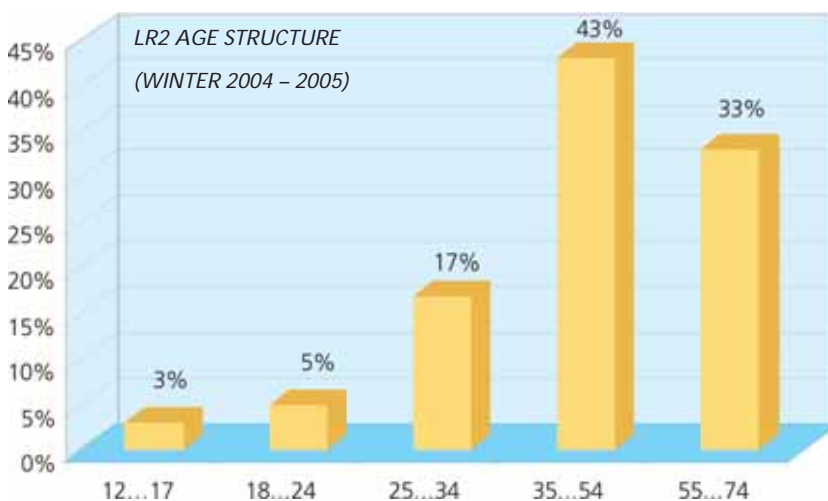
Latvians are sentimental and like to sing a lot about love! In total the sound library of LR2 holds more than 20,000 items of Latvian popular

# music channel in Latvian



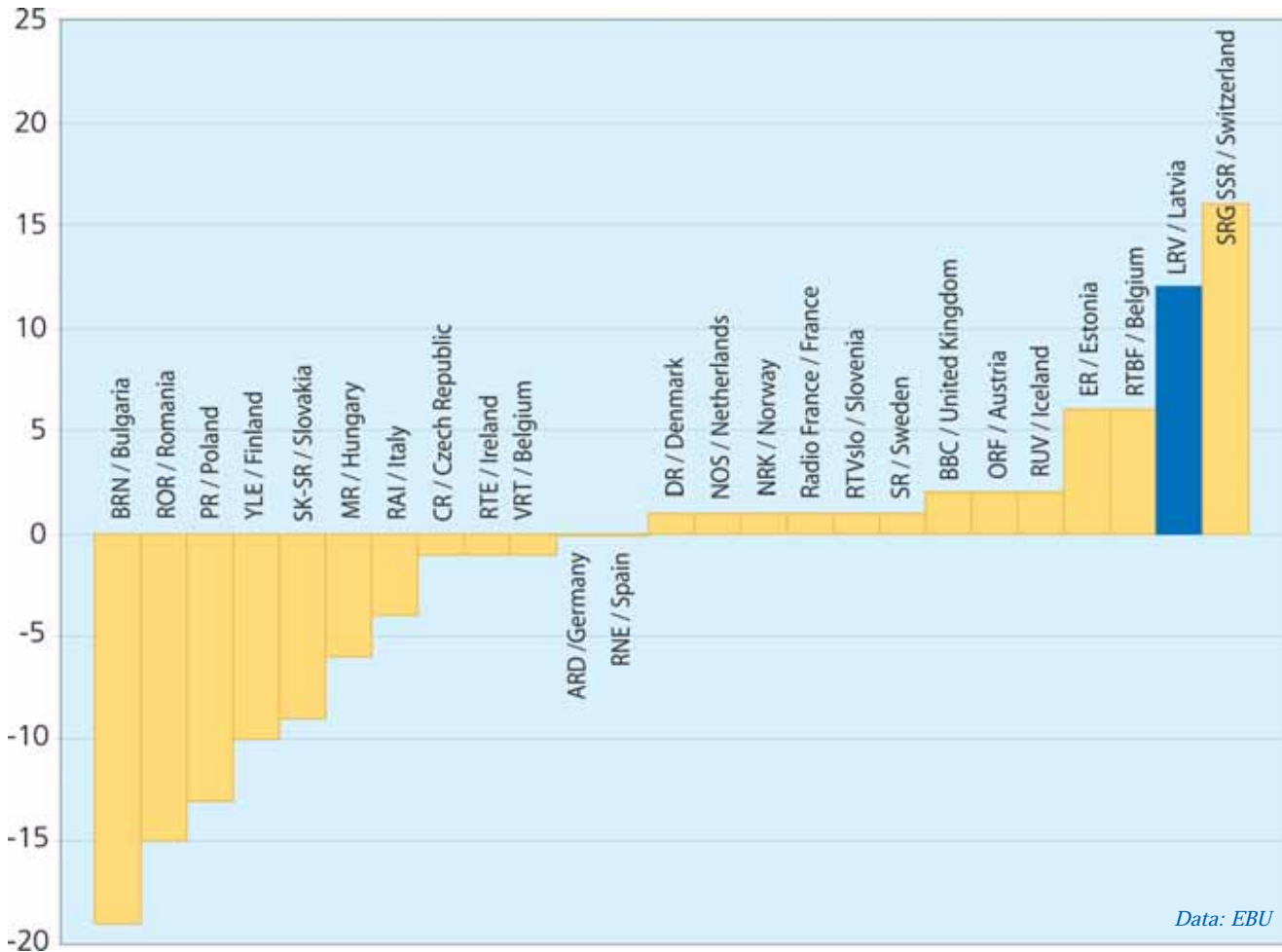
music, however, only 8,500 of these songs are on the play-list. A number of programmes attract audiences like magnets, in particular those that encourage listeners' letters. LR2's record of receiving an average of 2,000 letters a month from all over Latvia remains unsurpassed both by Latvian Radio's other channels and all the other channels in the country.

LR2's success in attracting larger audiences means that ethnic music can now find its place in today's music markets, despite the fact that they remain largely dominated by Anglo-American music. This is the most important message that Radio



Data: TNS/BMF

## PBS changes of audience (%) 1999 – 2003 (EBU members)



Latvia would like to send to its partners, the public broadcasters in Europe who still care about preserving cultural diversity.

### Competition

Latvian Radio has to withstand tough competition and it is only due to the success of LR2 that it has been able to increase its total audience share.

Despite LR1 losing some of its listeners to commercial competitors, a number of others have probably migrated to LR2 in order to listen to Latvian music.

A study of audience dynamics shows not only steady growth but second best performance in terms of audience

growth (after SRG/SSR, Switzerland) over a four-year period (1999–2003).

### Finance

Latvia has 36 radio channels for a population of 2.3 million. LR produces four programmes and participates in a fifth (NABA student radio) by providing a transmitter.

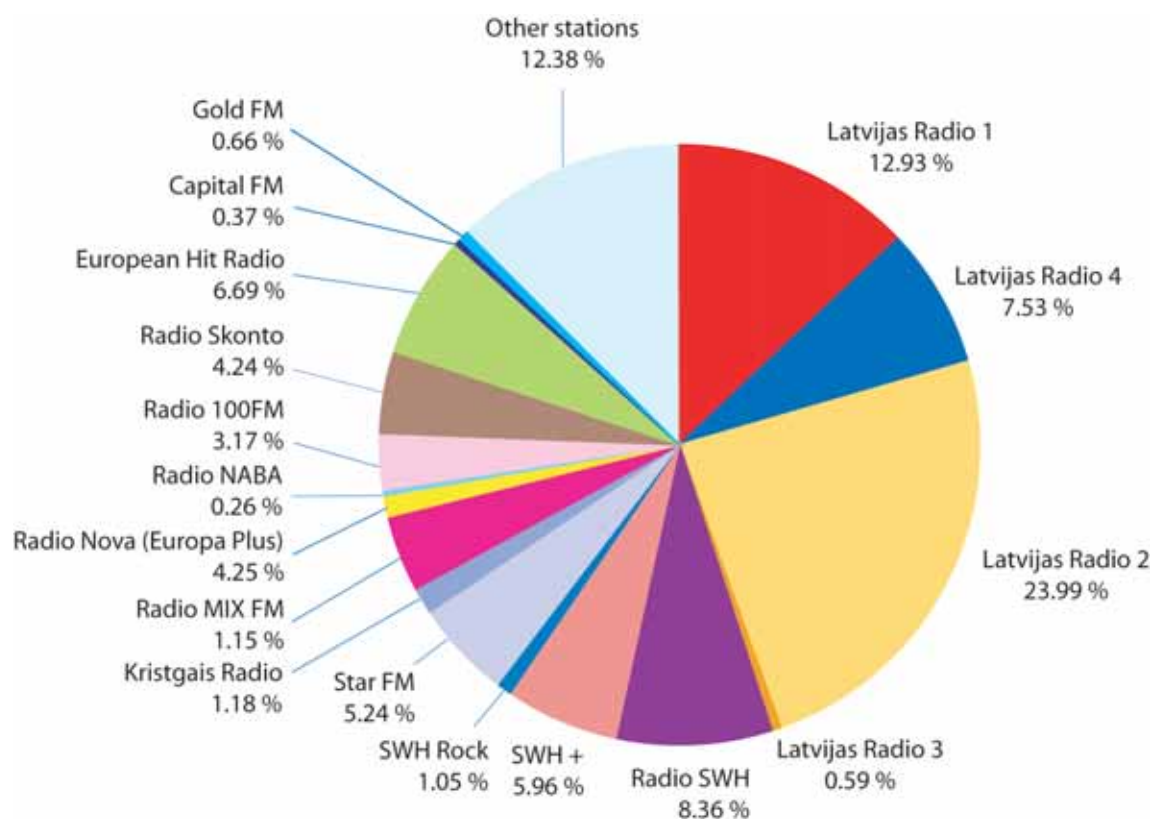
In spite of a prolonged crisis in public financing, public radio has succeeded in considerably increasing its audience. The annual allocation of public funds is roughly €4 million, commercial advertising revenue provides an additional €1.6 million. In terms of public radio spend per inhabitant, LR's income rates as one of the lowest in Europe. The public

broadcasters' total financing as a percentage of GDP is also on the decrease. In 2002 the figure was 0.18% of GDP, falling to 0.17% in 2003 and 0.16% in 2004. The average European level is 0.27% of GDP.

The new Radio and Television Bill, and Public Organizations Bill are presently under discussion.

Politicians have recently taken a decision not to introduce the licence fee; instead, the level of financing for public broadcasting as a percentage of the national budget is being mooted. The public broadcasters themselves, however, are deeply concerned about the new model.

## Share of audiences of radio stations (%) - Winter 2004 – 2005



LR1, LR2, LR3 and LR4 vs the main competitors. Data: TNS/BMF

### Latvia and Radio Latvia

Latvia (area 64,000 sq kilometers, population 2.3 million), parts of which were known as Livonia and Courland through the Middle Ages, and which finally gained independence on 18 November 1918, lies on the eastern coast of the Baltic Sea, between Estonia in the north and Lithuania in the south.

The ethnic mix of the population of Latvia is largely the result of massive immigration after World War II, which resulted in a decline in the share of ethnic Latvians (originally the Lettgallians, the Couronians, the Livonians, the Semigallians and the Selonians) from 77% in 1935 to 52% in 1989.

Radio Latvia was established on 1 November 1925, and will celebrate its 80th anniversary this autumn.

It had only two programme services when it separated from the Committee for Radio and Television in 1991. Now the number of programme services has increased to 4 national and 1 local service, with modern PC technologies providing the support to its production facilities. As seen from the audience share figures, the explosion of private electronic media in 1995 means that Radio Latvia operates in a tough competitive environment, compelling it to improve efficiency on a daily basis.

The programme services LR1 (Latvian) and LR4 (Russian and minorities) are generalist services, but LR2 and LR3 specialize in music. LR3 broadcasts classical and contemporary music, but LR2 plays pop music composed and performed by Latvians.

## Vatican Radio

# Myths de

**Seán Patrick Lovett**  
*Director of the English language  
service, Vatican Radio*

You don't need to be Roman  
Catholic to work for Vatican  
Radio



# debunked



But it does help in terms of what you do and why you do it.

No, we don't only broadcast the Rosary and the Mass in Latin (although they are among the most popular of our 40 language programmes).

No, the pope doesn't tell us what or what not to say (although we do give priority to what *he* says and does: it is, after all, 'The Pope's Radio').

No, we're not even the 'official mouthpiece' of either the pope in particular or the Church in general. According to our Statutes we're expected to "*get the message out as quickly as possible*" and to "*take responsibility*" (and, one presumes, the consequences) for what we say. As Vatican Radio myths go – that's just the tip of the iceberg. I should know.

I've been here for the past 28 years (one of my first tasks was to provide the radio commentary for the funeral of Pope Paul VI). And, no, I'm not a priest (although I frequently get mail addressed to Father, or even Monsignor, Seàn Patrick Lovett). Actually out of the 400 people who work here, only 10% are religious (i.e. priests or nuns) and a quarter of the staff are women (which often comes

as something of a surprise to those who think of the Vatican as a 'male-dominated institution').

On the subject of institutions, since its conception, Vatican Radio has been under the guidance and management of the Society of Jesus (the Jesuits). 17 of them work at Vatican Radio and many hold key directorial posts including those of director general (Fr Pasquale Borgomeo), director of Programming (Fr Federico Lombardi) and technical director (Fr Lino Dan).

Once nicknamed "The Pope's Army" because of their fidelity to the Holy Father, the global vision and missionary spirit of the Jesuits made them the ideal choice to harness the power of what, in the 1920's, was considered the greatest scientific discovery of all time: radio waves.

## Marconi

The man who made that discovery is a household name today. There isn't a town or village in Italy that doesn't have a street or a piazza named after him: Guglielmo Marconi.

Weather reports for 12 February 1931 say it was cold and windy in Rome. Marconi had to hold onto his top hat as he waited for Pope Pius XI outside the small building he himself had

designed to house the radio's transmission station on a hill inside the Vatican.

The tiny (108 acres or 43 hectares) City State was only two years old. It was one of the achievements of the 1929 Lateran Pacts which solved the so-called 'Roman question', but which effectively limited the pope's temporal power to what was little more than a walled garden behind St Peter's Basilica.

Pope Pius XI was fascinated by all things technological and scientific. As Universal Pastor, he was convinced he had to use technology to communicate beyond the confines of that small City State. Which is why he commissioned Marconi to set up the Vatican's radio station. Its mission was to carry the pope's voice and the "Good News of the Gospel" to the ends of the earth.

There have been other popes (Pius XII, John XXIII, Paul VI, John Paul I and John Paul II) and new technologies (satellites, Internet, digital audio...), but the mission of Vatican Radio has remained the same.

Now well into her '70s, and affectionately known as "the grandmother of radio stations", she continues to honour the opening premise of her Mission Statement:

*"...to announce the Christian message with liberty, fidelity and efficacy... to defend the teachings of the Pope...to provide information about the activities of the Holy See... to echo the voice of Catholic life in the world... and to evaluate present problems in the light of the Church's teaching."*

All of the above while "paying constant attention to the signs of the times". Roughly translated that means: being ready to accept change. And change it has.

From the first scientific news programmes in Latin (*Scientiarum Nuncius Radiophonicus*), to the multilinguistic information and entertainment programmes of today (40 languages including Latvian, Vietnamese, Swahili, Malayalam, Armenian, Tamil\*...). From short-wave broadcasts to satellites and the Internet. From being the voice of the Catholic Church in the catacombs of

Eastern Europe (until the fall of the Berlin Wall in 1989), to being an alternative voice that offers clear moral guidelines, consolation, healing and hope in the overcrowded marketplace of modern-day global communications.

The travelling pontificate of John Paul II has been a decisive factor in dictating that change: another of Vatican Radio's 'institutional tasks' is that of "recording and distributing all sound related to the activities of the Holy Father" both inside and outside the Vatican. It also has the duty of "protecting the rights" to the pope's voice and of "safeguarding its pastoral character" when used by third parties. That's easier said than done in an age when pirates of the ether roam and pillage at will.

## Back to mythology

No, it's not true that Vatican Radio is the most listened-to radio in the world. Even if it were, we wouldn't know. Vatican Radio has never undertaken a global audience survey: aside from the fact that such a survey would severely dent our annual



Vatican Radio aerial



Radio News Group visit, November 2004

budget, there are serious doubts about its accuracy.

Nowadays you're more likely to hear a Vatican Radio programme being rebroadcast on your local radio station than on Vatican Radio itself. The latest figures list 1,040 rebroadcasters (58 in France alone and 363 in Latin America) in over 70 countries around the world. And those are the official numbers. They don't take into consideration the hundreds of small (diocesan, hospital, school, university and commercial) radios that download daily programming that's 'free to air'.

Finally, Vatican Radio has no 'alternative sources of income': we don't sell advertising space or airtime and we offer our programmes for rebroadcast free of charge. We are at the service of the Holy See and somewhere on the Vatican's complex and comprehensive budget are the words: Vatican Radio.

## Want to listen?

If you haven't already done so, a visit to our website might be worth your while: [www.vaticanradio.org](http://www.vaticanradio.org).

But if you really enjoy debunking myths, then a visit to Vatican Radio's One-O-Five Live website is a must in terms of the variety of programme content offered in English (and Italian): [www.105live.vaticanradio.org](http://www.105live.vaticanradio.org).

One-O-Five Live is the closest Vatican Radio could get to a face-lift. The channel is broadcast live to the Rome area on 105 FM (hence the name) and provides dynamic, interactive programming in Italian with news and information in English and French. Content can be listened to or downloaded directly from the website in MP3. A youthful staff provides a 21st-century sound that's surprisingly competitive in a non-commercial way. No topic is taboo, although everything is placed in a Catholic/Christian perspective. Music plays an important part: from pop and jazz to classical and liturgical.

It almost makes you want to listen, doesn't it?

\* *36 million people mostly in the State of Kerala, India, speak Malayalam.*



Father Pasquale Borgoméo



Vatican Radio studio

Your Voice, your culture.  
your music...

## Netherlands Public Broadcasting acquires Colorful Radio cable frequencies

Netherlands Public Broadcasting has acquired cable contracts for the distribution of the previously commercial station Colorful Radio from 'Nederlandse Radio Groep', property of an investment company.

Netherlands Public Broadcasting intends to transform Colorful Radio into a public station aimed at second and third generation youths from immigrant groups in Dutch society. Other public radio stations have had little success attracting listeners from this segment. Colorful Radio currently plays mainly R'n'B and Hip Hop music with little or no speech. For the time being, it will continue operating in this form under the public banner.

Colorful Radio will be the second cable station which Netherlands

Public Broadcasting sees as a 'side activity' (the other is the classical Concertzender). It will perform an 'extra' task alongside the five public radio stations which broadcast in the ether. Because approximately 95 per cent of Dutch households have a cable connection, the government, generally speaking, allows public broadcasting to take on such side activities. This specific activity will be judged by the Dutch Media Authority afterwards. Of course the Authority as well as the Secretary of Culture were punctually informed during discussions about this deal.

Florent Luyckx, station coordinator at 3FM, will assume control of the new station. Luyckx is now filling in the details of programming at the sixth public radio station. He is receiving assistance from Peter Jansen,

PROGRAMMERING

groovy



party



color

latino



bubble

club

EN NOG VEEL MEER...

# Colorful

HilverSummary  
March 2004 (NPB publication)

the inspiration behind Colorful Radio, who was hired as programme director at the new station. Luyckx will soon meet broadcasting organizations which have expressed an interest in airing the new station's output.

### Strong brand

Jan Westerhof, station coordinator at Radio 1 and 747 AM, was closely involved with the transition. He expects the details of the station's format to be clear by September. That means we will have realized the initial planning for the new targeted station in just one year. And that is something to be proud of. It is still unknown what the new station will be called. Westerhof: "Colorful Radio is seen as a strong brand name, so maybe it should be kept."

By taking over Colorful Radio, Netherlands Public Broadcasting has acquired a station with nearly nationwide coverage on cable. "That is the big advantage of this takeover," says Westerhof. "If we had started a station from scratch, we would have had to negotiate with each individual cable company regarding access to the cable in their area. That alone would have delayed the process by two years."

The Commercial Radio Association (Vereniging Commerciele Radio [VCR]) petitioned a court for an injunction against the takeover, arguing that it was in conflict with the Media Law. After all, this law lays down a strict division between public and commercial broadcasting. However, the court did not rule in its favour.

[www.colorful.nu](http://www.colorful.nu)



<mms://streamer.euronet.nl/colorfulnb>



# ful Radio

# RCI: 60th

anniversary contest

Patrick Jaquin

CONTEST

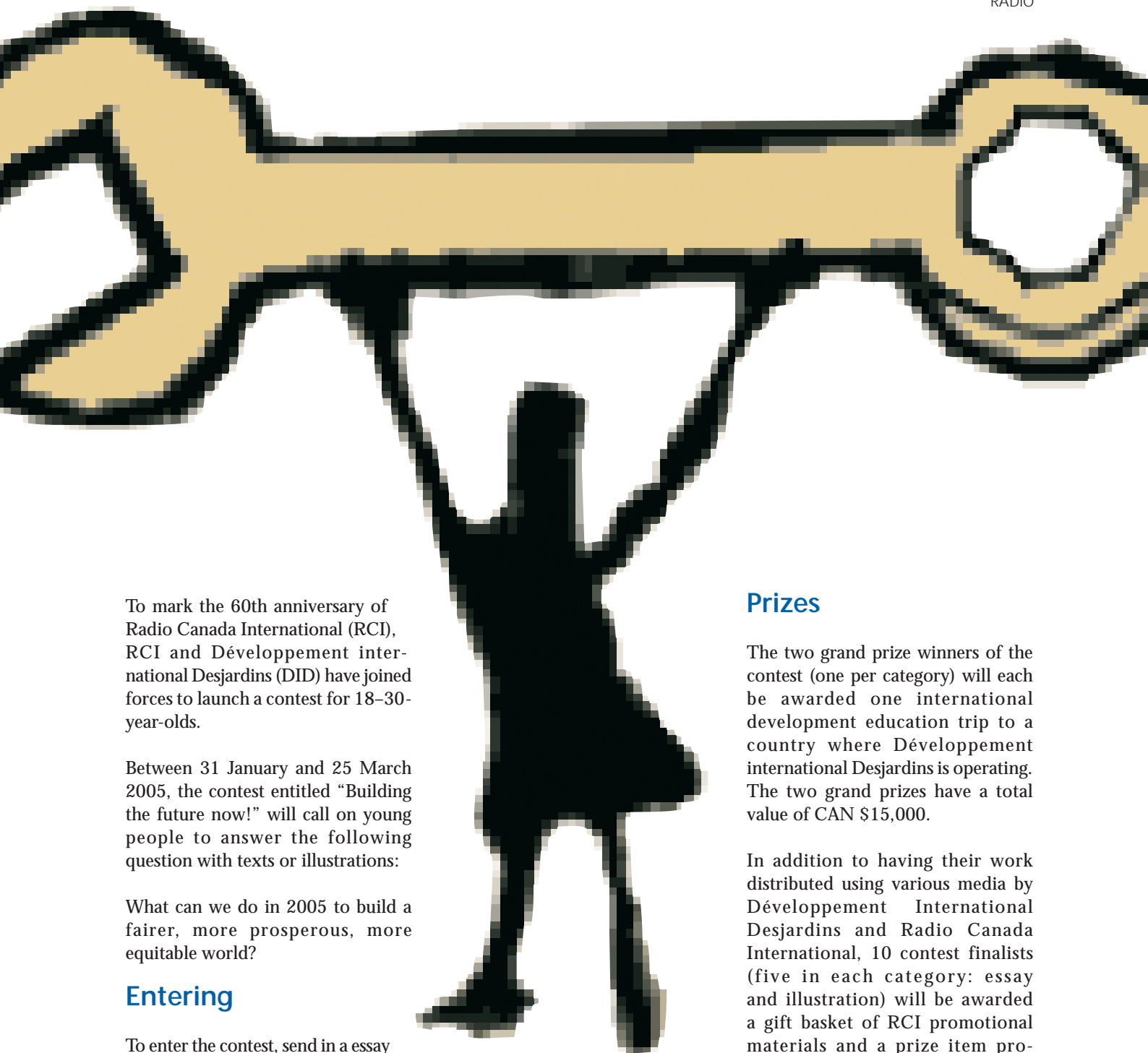
## BUILDING THE FUTURE NOW!

BEGINNING JANUARY 31<sup>ST</sup> 2005

What can we do in 2005 to build a fairer,  
more prosperous, more equitable world?



**THE PRIZES INCLUDE:**  
TWO INTERNATIONAL  
DEVELOPMENT EDUCATION TRIPS  
FOR A TOTAL VALUE OF \$15,000



To mark the 60th anniversary of Radio Canada International (RCI), RCI and Développement international Desjardins (DID) have joined forces to launch a contest for 18–30-year-olds.

Between 31 January and 25 March 2005, the contest entitled “Building the future now!” will call on young people to answer the following question with texts or illustrations:

What can we do in 2005 to build a fairer, more prosperous, more equitable world?

## Entering

To enter the contest, send in a essay or illustration in response to the question.

Submissions may be in one of the following formats:

- an essay of 500 words maximum in English, French or Spanish;
- an illustration (drawing, painting, comic strip, etc.) no larger than 27.9 cm x 43.2 cm.

Selection criteria:

- topic and eligibility conditions are respected;

- originality of the entry;
- strength and clarity of the message transmitted (the message encourages thought and action and presents credible paths for solutions);
- quality of piece of art or literary quality (i.e. language).

Regardless of the format chosen, each submission must allow the jury to easily understand the participant’s vision of how to build a fairer, more prosperous, more equitable world.

## Prizes

The two grand prize winners of the contest (one per category) will each be awarded one international development education trip to a country where Développement international Desjardins is operating. The two grand prizes have a total value of CAN \$15,000.

In addition to having their work distributed using various media by Développement International Desjardins and Radio Canada International, 10 contest finalists (five in each category: essay and illustration) will be awarded a gift basket of RCI promotional materials and a prize item produced in a country where DID is operating.

## Eligibility

The submission must include the following information: full name, date of birth, complete postal address (and e-mail if applicable) and telephone number. Any illustration submitted must also include a short essay (maximum of 250 words) explaining its meaning.

Submissions must be received at the following address before 25 March 2005:

