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Radio broadcasting market

Richard Deiss

In Europe regular radio broadcasting started at the beginning of the 1920s. The deregulation that commenced in the eighties resulted in a rapid growth of private radio networks. Alongside nation-wide general-interest radio stations there are today local commercial stations that are part of a franchise as well as a huge number of local independent commercial stations and non-commercial community radio stations run by associations.

- Between 1996 and 1998 production of radio receivers in the EU increased by about 9% per year to over 16 million. Among the EU Member States Portugal is the largest producer of radio receivers. The world's leading radio producer is China.
- Intra EU trade of radio receivers amounted in 2000 to just under 3 billion euro. EU radio receiver exports to third countries amounted to 400 million euro and imports to just over 3.5 billion euro.
- About 99 % of households in the EU are equipped with at least one radio receiver. According to UNESCO, the number of radio receivers in the EU amounted to about 340 million in 1997 and approximately 2 billion in the world. French and German data suggest however that including all types of equipment the number of radio receivers in the EU reaches between 600 and 950 million.
- In 1999 in the EU there were about 11.5 thousand enterprises in the radio and TV sector. In the same period, employment amounted to approximately 290 thousand persons of which about 90 thousand in the radio sector. In the EU, on average there are 25 persons employed per enterprise in the radio and TV sector.
- Between 1994 and 2000 the number of radio stations in the EU declined from about 7.600 to about 5.500 stations of which about 5.100 private and 400 public stations. Italy is the EU Member State with the highest number of radio stations. Digital broadcasting is becoming more common. In the EU there is a total of almost 1.000 radio stations broadcasting over the Internet.
- An adult person in the EU listens to the radio on average 162 minutes per day compared to 204 minutes for TV viewing.



Production and trade

Among the EU Member States Portugal is the largest producer of radio receivers with over 5 million radios produced in 1998. France and Germany follow with 4.5 million and 3.9 million radio receivers produced in 1998.

Between 1996 and 1998 radio production increased by approximately 9% per year in the EU as a whole. The production in Spain has quintupled in the period 1996 to 1998, while the production in Italy has declined by over 90% in the same period.

The world's leading radio producer is China with over 41 million radio receivers produced in 1994, followed by Malaysia which yearly produced around 30 million radios between 1996 and 1998.

The EU radio sector exports in 2000 amounted to 400 million euro and imports to over 3.5 billion euro. Imports thus exceeded exports by just over 3 billion euro in EU. Intra EU trade in 2000 was just under 3 billion euro.

The import (value) of radio receivers in the EU as a whole has increased by about 2 billion euro between

Table 1: Important producers of radio receivers

	Number of produced receivers (in 1 000)		
	1996	1997	1998
D	3,342	3,632	3,884
E	82	313	508
F	3,606	:	4,559
I	955	66	65
P	4,372	4,552	5,075
UK	1,225	2,096	2,072
China	41,320 ¹	:	:
Indonesia	:	4,177	:
Malaysia	29,431	33,491	30,265
Brazil	2,941	4,211	2,753
Japan	2,638	2,434	2,623
Hungary	310	528	2,328

¹Data for 1994.

Source: Eurostat/EUOPROM S; for DE, E and non-EU countries, source UN

1995 and 2000, while total exports increased by just over 1 billion euro during the same period.

The radio sector represented 0.25% of total imports and 0.13% of total exports in the EU in 2000. In Portugal the radio sector represents 2.33% of total exports. With imports amounting to 1.6 billion euro in 2000 Germany is the largest importer of

radio receivers in the EU, followed by UK and France. In the same year Portugal was the largest exporter with exports of almost 700 million euro in 2000, followed by Belgium and Germany. Only Belgium, Denmark and Portugal had a trade surplus in the radio manufacturing sector.

Table 2: Exports, imports and trade balance in the radio sector

	Exports (in million EUR)			Imports (in million EUR)			Trade balance (million EUR), 2000
	1995	2000	Radio sector as % of total export, 2000	1995	2000	Radio sector as % of total import, 2000	
EU-15	2,274	3,440	0.13	4,141	6,477	0.25	-3,038
B	478	674	0.34	432	625	0.34	50
DK	98	112	0.22	78	87	0.18	25
D	353	617	0.10	1,126	1,612	0.29	-995
EL	0.5	2	0.01	38	72	0.23	-70
E	30	52	0.06	295	523	0.32	-471
F	317	417	0.12	535	736	0.20	-319
IRL	0.7	10	0.02	26	43	0.08	-32
I	14	22	0.01	327	476	0.19	-454
L	:	6	0.06	:	17	0.13	-11
NL	345	524	0.20	467	727	0.23	-203
A	2	156	0.21	17	213	0.27	-57
P	406	695	2.33	63	84	0.20	611
FIN	2	5	0.01	42	75	0.20	-70
S	30	45	0.05	139	255	0.32	-210
UK	199	104	0.03	556	933	0.25	-829

Source: Eurostat/EUOPROM S

Radio penetration

Table 3: Number of radio receivers

	Number of radio receivers (1000)					Number of radio receivers per 1000 inhabitants		
	1980	1990	1995	1996	1997	1980	1990	1997
EU-15	179,525	310,095	328,550	340,430	343,500	505	851	918
B	7,200	7,660	8,000	8,050	8,075	731	770	797
DK	4,750	5,250	5,400	6,000	6,020	927	1,021	1,145
D	:	69,650	77,000	77,500	77,800	:	878	948
EL	3,310	4,250	4,500	5,000	5,020	343	416	475
E	9,700	12,000	12,450	13,000	13,100	258	305	331
F	39,900	50,370	52,000	55,000	55,300	741	888	946
IRL	1,275	2,170	2,300	2,500	2,550	375	619	697
I	34,000	45,500	47,000	50,000	50,500	602	798	880
L	200	240	260	280	285	549	630	683
NL	9,200	13,550	14,500	15,000	15,300	650	906	980
A	3,830	4,755	4,990	6,000	6,080	507	617	751
P	1,660	2,240	2,400	3,000	3,020	170	227	306
FIN	4,000	4,960	6,800	7,100	7,700	837	995	1,498
S	7,000	7,500	7,750	8,000	8,250	842	876	932
UK	53,500	80,000	83,200	84,000	84,500	950	1,390	1,443
US	454,500	529,440	559,000	570,000	575,000	1,973	2,084	2,116
Japan	79,200	111,000	114,500	120,000	120,500	678	899	956

Source: Unesco

Table 4: Households equipped with at least one radio in France

	% of households owning a radio		Average number per household
	1995	2000	2000
Any type of radio	98.7	98.8	6.3
Clock radio	77.3	80.3	1.6
Radiocassette recorders	88.0	85.2	1.8
Radio included in Hi-fi	71.7	78.4	1.3
Car radio	76.0	80.7	1.3
Walk-man	29.2	26.5	0.4

Source: Médiamétrie

Table 5: Persons equipped with at least one radio in Germany

	% of persons owning a radio	
	1999	2001
At least 1 radio ¹	98.6	98.8
1 radio	8.6	7.0
2 radios	17.1	20.3
3 radios	27.5	25.5
4 and more radios	45.4	46.0
Car radios	78.2	82.8

¹ Any type of radio

Source: SWR Medienforschung

According to UNESCO, the number of radio receivers in the EU amounted to approximately 344 million in 1997 (world ca: 2 billion) or 2.3 radios per household. 99 % of EU households have at least one radio. Radios combined with other music devices have become more common. That is why the total number of receivers is probably higher than the UNESCO estimates, which refer to a narrow definition of radio receivers. Data available for France and Germany suggest that the total number of radio receivers in the EU reach between 600 and 950 million. In Germany nearly half of all households have 4 and more radios, in France there were on average 6.3 radios per household in 2000 (there are about 150 million households in the EU).

Economic data

Table 6: Radio and television service enterprises, employment and turnover (NACE 92.2)

	Number of enterprises				Employment (1000)				Turnover at basic prices (Million EUR)			
	1997	1998	1999	2000	1997	1998	1999	2000	1997	1998	1999	2000
EU-15	9,300	11,100	11,500		270	300	290		44,600	46,800	52,000	
B	373	598	613	618	8	7	8	9	588	622	713	902
DK	218	244	257	:	2	2	2	:	139	176	239	:
D	569	646	676	:	52	62	72	83	6,738	6,869	7,126	:
EL	:	:	:	:	:	:	:	:	:	:	:	:
E	1,108	:	:	:	30	:	:	:	3,411	:	:	:
F	732	734	:	:	17	17	:	:	6,468	6,963	:	:
IRL	:	:	:	:	:	:	:	:	:	:	:	:
I	2,621	2,566	:	:	24	25	:	:	5,025	5,549	:	:
L	34	35	38	38	:	:	:	:	:	:	:	:
NL	:	:	:	:	:	:	:	:	:	:	:	:
A	:	:	:	:	:	:	:	:	:	:	:	:
P	:	312	417	:	:	7	6	:	:	506	605	:
FIN	146	163	167	:	6	7	6	:	594	674	718	:
S	435	475	508	:	8	8	8	:	1,133	1,206	:	:
UK	2,303	2,715	2,700	3,055	73	88	73	87	14,767	15,506	17,669	:

Source: Eurostat/A UVIS

Estimated data in italics

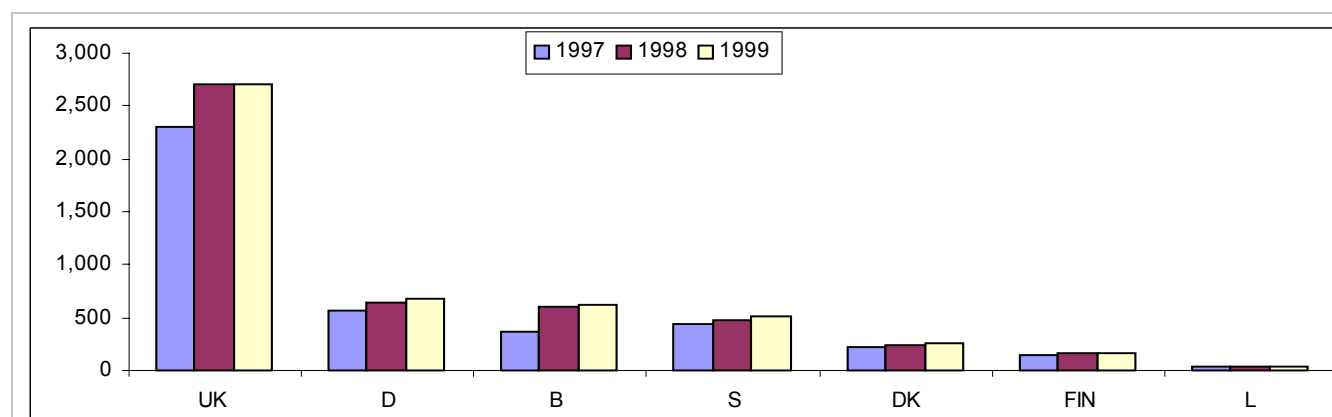
In 1999 in the EU, there were approximately 11.5 thousand enterprises in the radio and TV sector. The UK is the country with most enterprises (2,700) in the radio and television sector followed by Italy and Spain. The number of enterprises has increased by just over 25% in the EU between 1997 and 1999.

There were about 290 thousand persons employed in the radio and television sector in 1999. About 90

thousand of these were employed in the radio sector. In the EU, on average there are 25 persons employed per enterprise in the radio and TV sector.

In 1999 turnover in the radio and television sector amounted to roughly 52 billion euro. 42 bn euro (82% of the turnover) came from TV broadcasting and about 10 bn euro (18% of the turnover) came from the radio market.

Figure 1: Number of enterprises in the radio and television sector in 1997-1999



Source: Eurostat/A UVIS

Radio programme services

Table 7: Number of radio programme services (stations)

	Number of radio stations with national origin					Number of radio stations by status in 2000		Number of radio stations with national origin and nationwide distribution in 2000		
	1990	1995	1998	1999	2000	Public	Private	Total	Public	Private
B	252	:	:	:	:	:	:	:	:	:
DK	352	285	274	:	245	3	242	3	3	0
D	171	231	233	:	240	59	181	11	2	9
EL	33	:	14	266	266	25	241	4	4	0
E	2,017	2,742	:	1,193	:	:	:	:	:	:
F	:	:	458	:	:	:	:	:	:	:
IRL	25	38	35	:	:	:	:	:	:	:
I	:	2,017	1,067	1,832	1,837	10	1,827	27	3	24
L	4	20	22	25	24	1	23	8	1	7
NL	18	30	30	356	363	330	33	21	5	16
A	13	13	:	:	:	:	:	:	:	:
P	325	337	334	335	343	7	336	9	3	6
FIN	70	91	92	94	94	34	60	9	8	1
S	29	105	115	115	114	31	83	6	6	0
UK	:	221	268	291	:	:	:	:	:	:

Source: Eurostat/A UVIS

Estimated data in italics

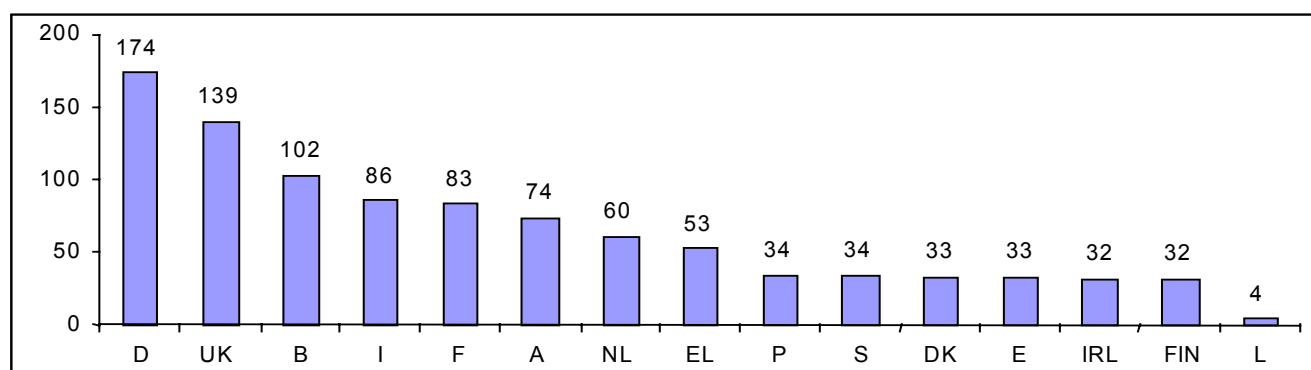
Between 1994 and 2000 the number of radio stations in the EU declined from an estimated 7,600 stations to about 5,500 stations (of which about 5,100 private and 400 public), a decrease of about 28%. However, the numbers of radio stations has increased substantially in several of the Member States since 1990. For example, the number of stations in Greece has increased by 800%, in Luxembourg by 600% and in Sweden by 400%.

The country with the highest share of public radio stations is the Netherlands where 95% of stations are public, Austria is the second with 85% public. At the other end of the scale are Italy, Denmark, Portugal, Belgium and Luxembourg with over 96% private radio stations.

Italy has the largest number of radio stations with a nation-wide distribution followed by the Netherlands. In both countries these stations are to a large extent privately owned. Sweden, Greece and Denmark have the lowest number of stations broadcasting nation-wide and all of these are public stations.

During the last couple of years digital broadcasting has become more common. 285 million persons in the world have access to more than 585 different digital radio services, 400 out of these are in the EU. In the EU there are a total of almost 1,000 radio stations broadcasting over the Internet. In mid 2002 Germany (174) had the largest number of Internet stations followed by the UK (139) and Belgium (102).

Figure 2: Number of web radio stations in 2002



Source: Surfmusic.de, real.com, web-radio.fm, ituner.com

Listening times

Table 8: Average listening times and hours of broadcasting

	Average radio listening time of adults (min/day)						Hours of radio programmes broadcasted in 2000 by public radio services of national origin		
	1990	1995	1997	1998	1999	2000	Total hours	Music (%)	Speech (%)
B	:	:	:	:	:	:	:	:	:
DK	156	153	191	195	194	192	59.098	30	70
D	:	167	177	172	179	209	530.588 ¹	60	40
EL	:	:	:	:	:	:	:	:	:
E	:	:	:	:	95	95	:	:	:
F	:	193	189	189	161	:	476.927 ¹	2	98
IRL	:	279	:	:	:	:	:	:	:
I	:	170	165	169	170	:	26.223	:	:
L	:	:	:	:	:	:	:	:	:
NL	:	170	176	181	175	176	40.150	:	:
A	140	173	:	:	:	:	:	:	:
P	:	194	197	187	194	192	72.774	66	34
FIN	199	219	205	199	190	201	117.434	56	44
S	126	188	185	183	183	174	121.949	:	:
UK	:	156	150	150	150	:	289.492 ¹	:	:
IS	:	178	174	173	172	204	15.612	:	:
N	148	138	144	:	:	:	7.458	:	:

¹Data for 1999

Source: Eurostat/AUVIS

Estimated data in italics

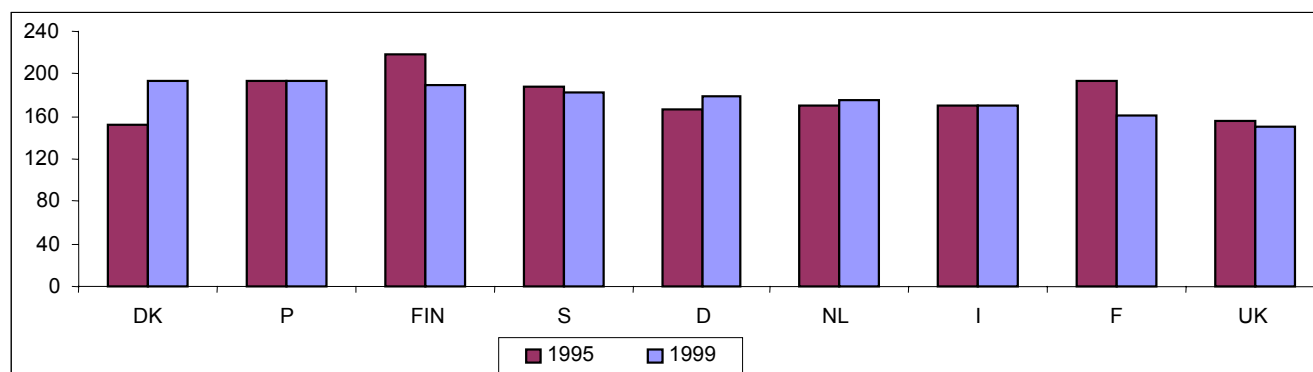
Among the EU Member States, for which data is available, Portugal and Denmark are the countries with the highest average radio listening per day in 1999. An adult person in Portugal or Denmark listened to the radio on average 194 minutes (3 h 14 min) per day, closely followed by

Finland (190 min) and Sweden (183 min). The average listening time per day has declined or remained unchanged in six out of nine EU members between 1995 and 1999.

The total number of hours of radio programmes broadcast by public

radio services of national origin in 2000 varied strongly among the EU countries. Germany had the highest number of hours broadcast with over 500.000 hours while Italy broadcast only 26.200 hours. On average 43% of the total hours broadcast were music and 57% speech.

Figure 3: Average radio listening times for adults (minutes/day), 1995 and 1999



Source: Eurostat/AUVIS

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

This statistics in Focus (SiF) is based on annual audio-visual service statistics in the AUVIS domain from Eurostat's reference database New Cronos, theme 4 Industry, Trade and Services. Some additional data were added using the EUROPROMS domain in New Cronos, UNESCO (www.unesco.org), Médiamétrie (www.mediametrie.fr), SWR Medienforschung (www.swr.de), Surfmusic.de, real.com, web-radio.fm and ituner.com as a source.

Turnover of radio/TV broadcasters: Total revenue (operating incomes) from all services rendered by radio/TV broadcasters. Operating incomes may comprise receipts from radio/TV licence fees, public subsidies, radio/TV advertising, sponsorship, tele-shopping, subscription fees, receipts from exploitation of own radio/TV programme copyrights and other operating incomes as income from concessions, patents, trademarks and similar value, etc.

Radio programme services: Total number of radio stations (public or private). A radio station can have several channels.

Public radio programme services: Total number of radio stations which have a public obligation and which may be financed totally or partly by licence fees or by public subsidies.

Private radio programme services: Total number of private radio stations. Private radio stations are usually financed by advertising or sponsorship.

Daily listening times of adults: Total amount of listening time spent, expressed as an average daily listening time in minutes. Annual average. The age limit for adults varies from 14-18 years.

Web radio stations: The sum refers to the number of web radio stations listed on the Internet and has been obtained through the following web radio stations Surfmusic.de, real.com, web-radio.fm and ituner.com. Each station has been counted once. Hence, double counting is avoided.

Abbreviations:

EUR Euro EUR is also used in series that were originally compiled in ECU as the exchange rate was 1 ECU to 1 EUR)

Symbols:

: Data not available

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➤ Reference publications

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