

Norway - the land of digital radio: *Diffusion of radio tech and changing radio habits*

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@futsaeter

Agenda

1. Introduction
2. Diffusion of radio tech
3. Radio listening: 2016 - 2018
4. Summary and future perspectives

1. Introduction

#LookToNorway: Digital leader

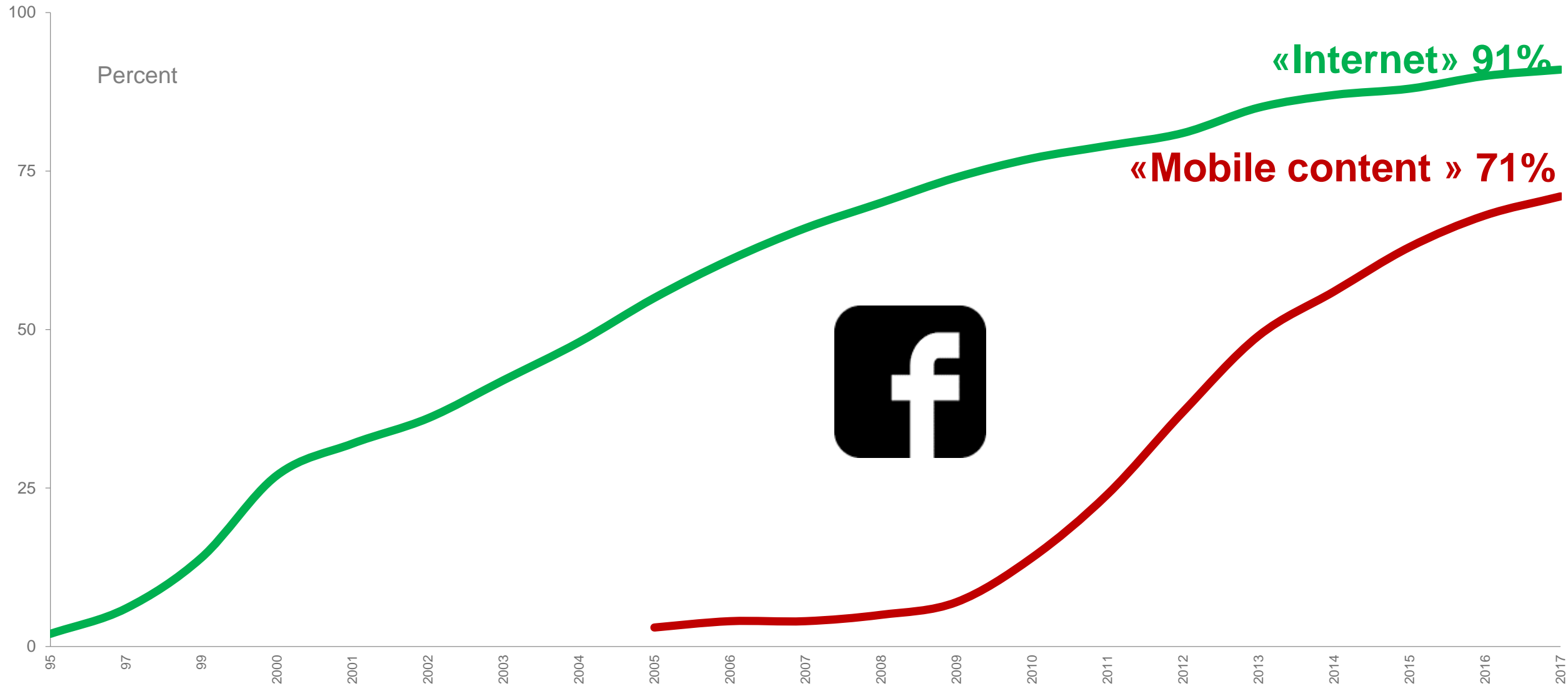
Internet 97%
Smart phone 91%
Tablet 67%

Access

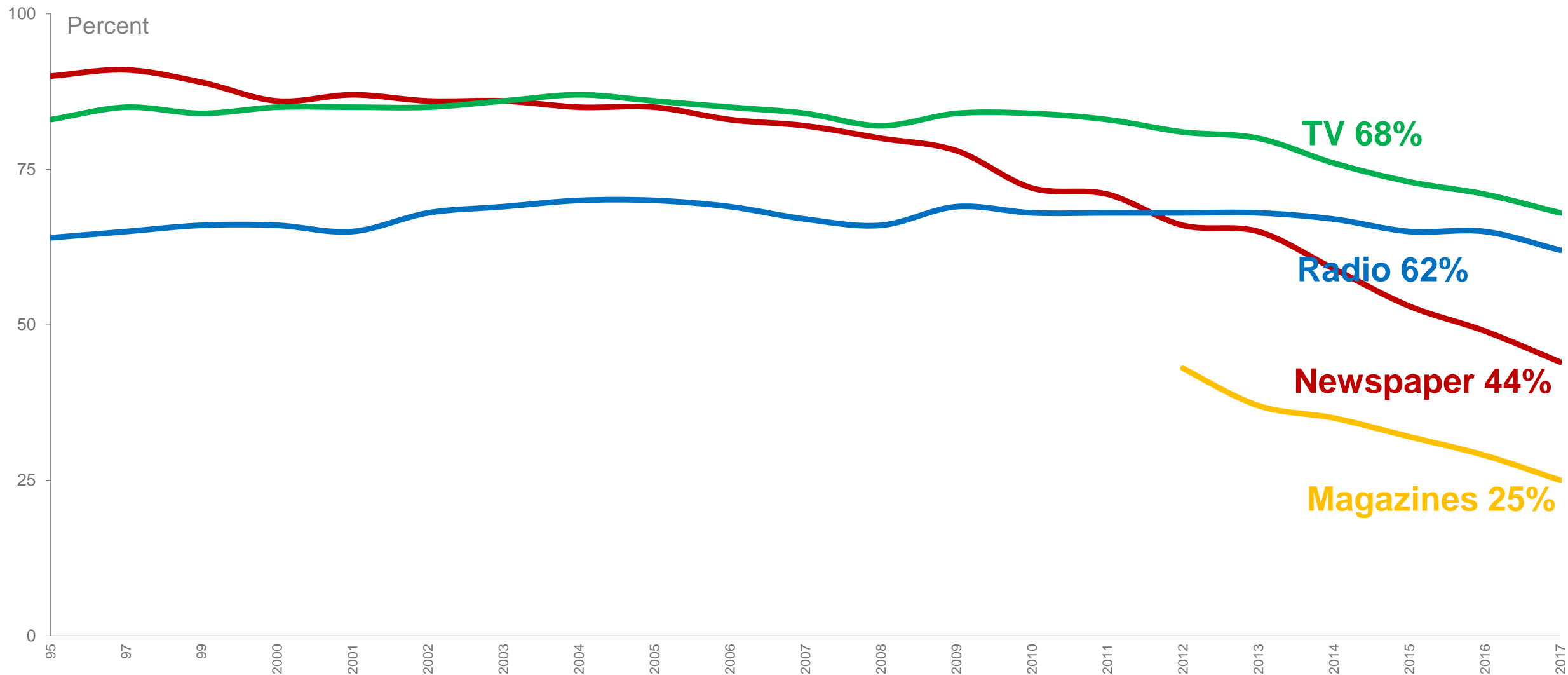
Daily reach

Internet 91%
Facebook 77%
Mobile content 69%

Increased daily reach of Internet and mobile content



Decreased daily reach of traditional media



Source: Daily reach 1995-2017. Consumer & Media.

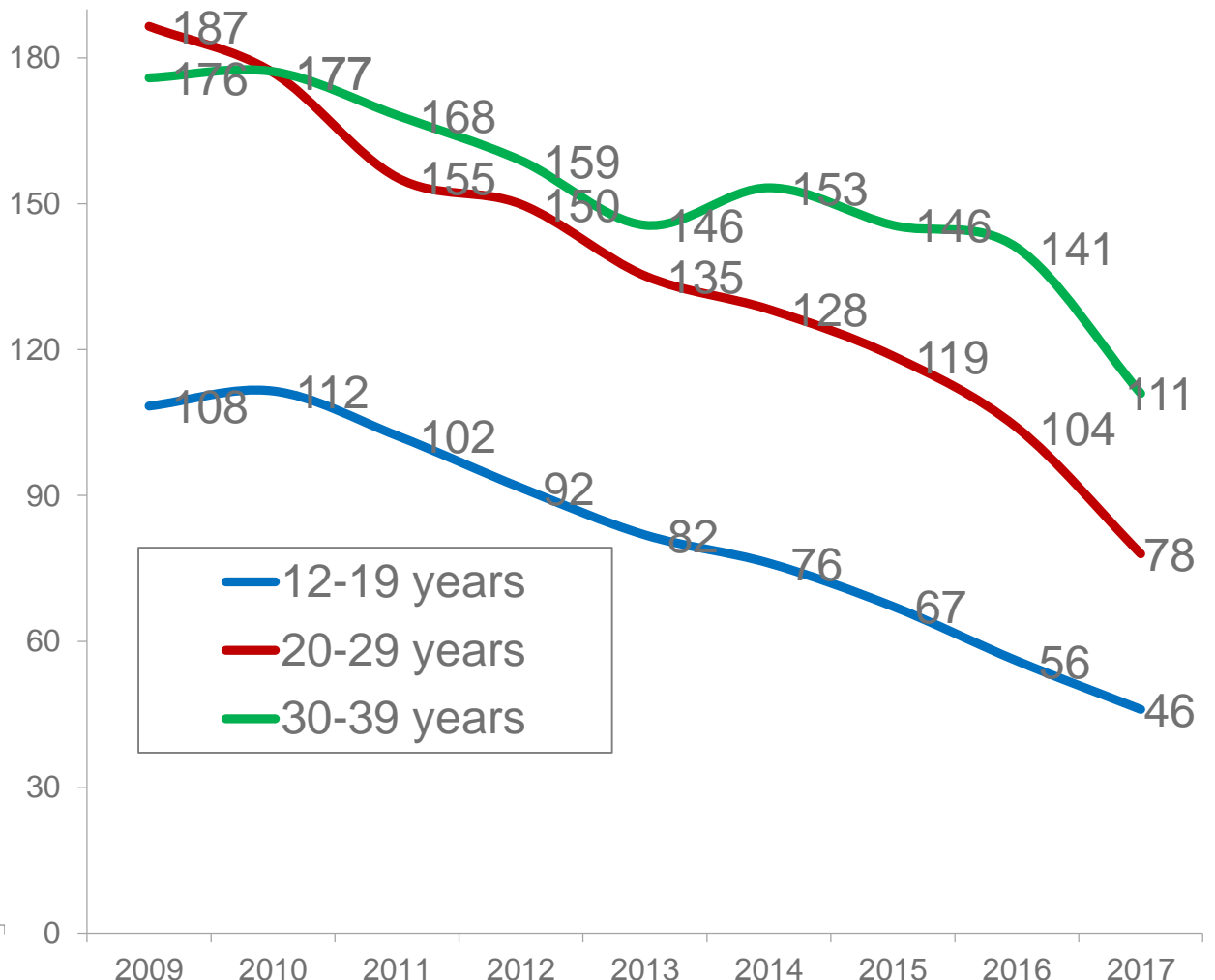
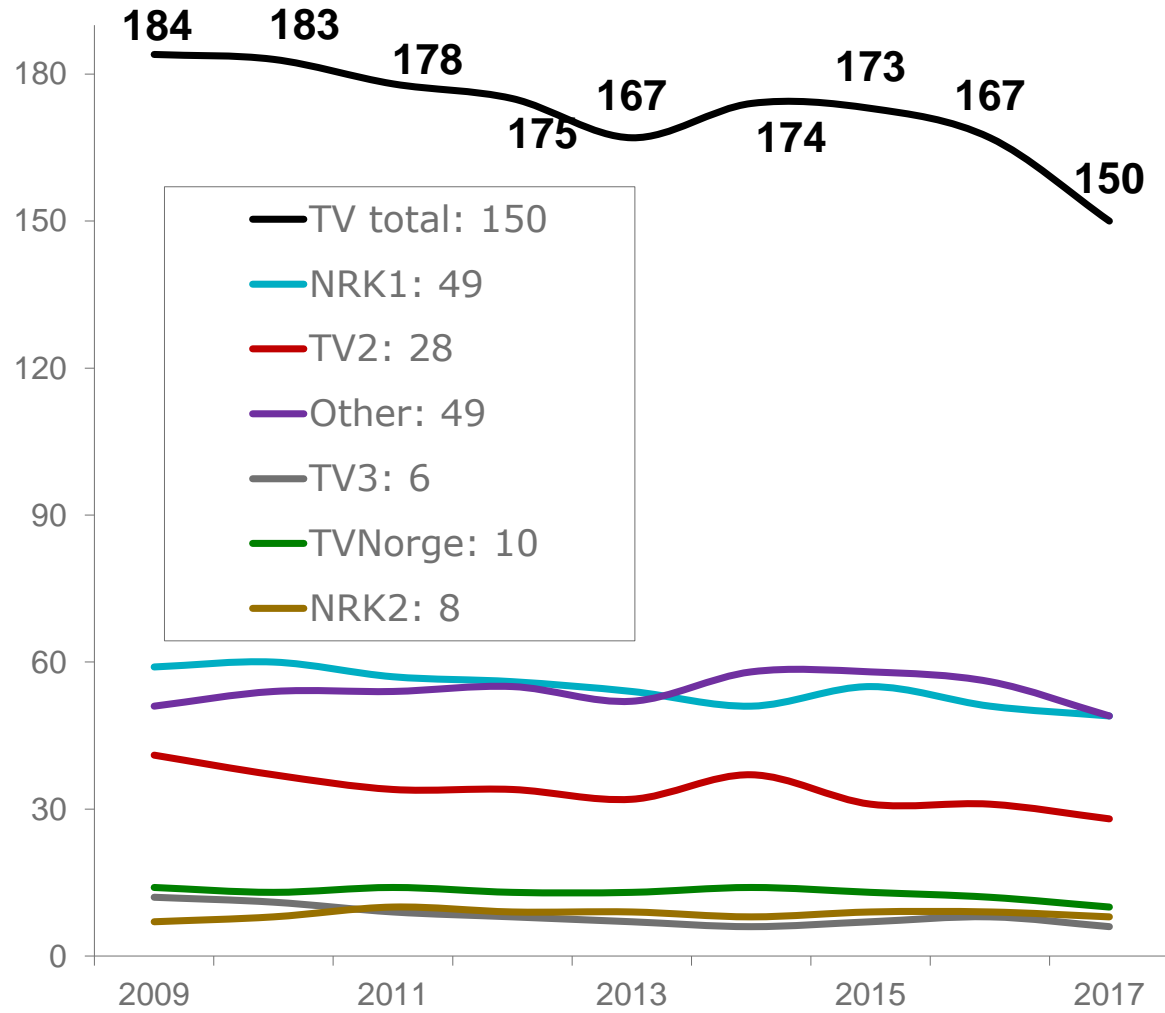
Data fra Forbruker & Media fra 1994. *Flerkanalsamfunnet* (Lundby & Futsæter, 1993)

Fragmentering av medielandskapet og oppsplitting av publikum (Futsæter 1998).

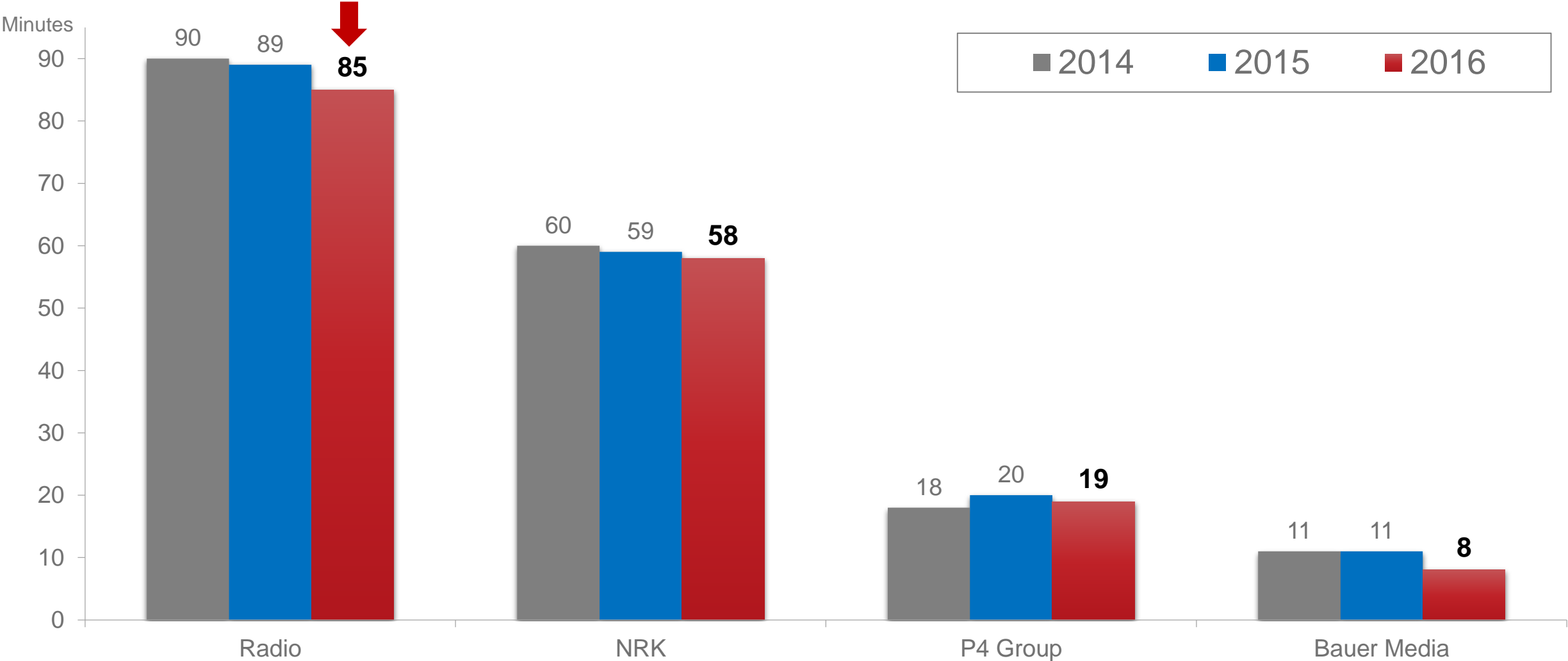
Mobilt innhold gjelder alle norske mobile utgaver som er målt i F&M, både fra aviser, TV og andre.

Daily viewing time for TV:

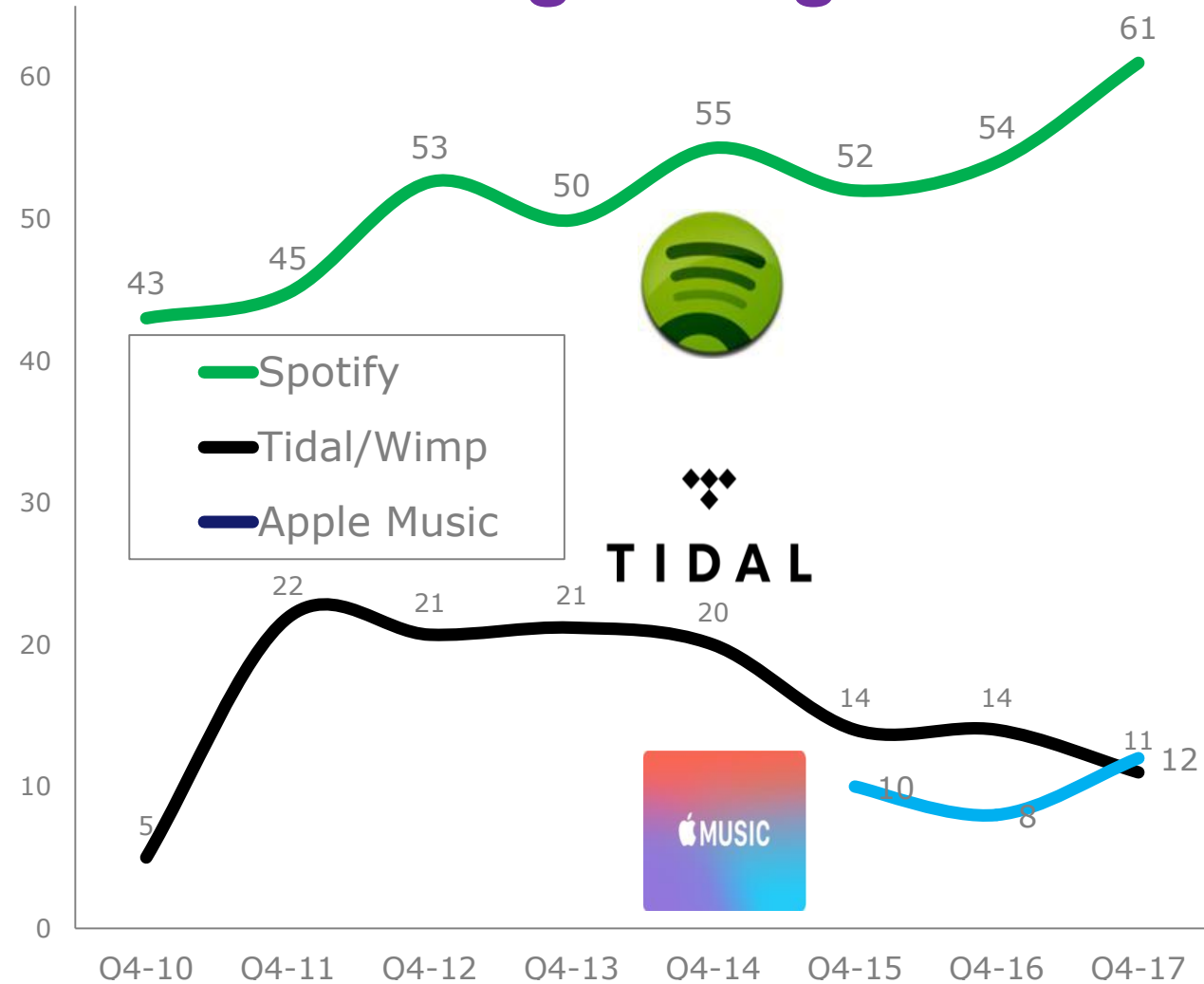
Decreasing viewing time – especially among those under 40 years



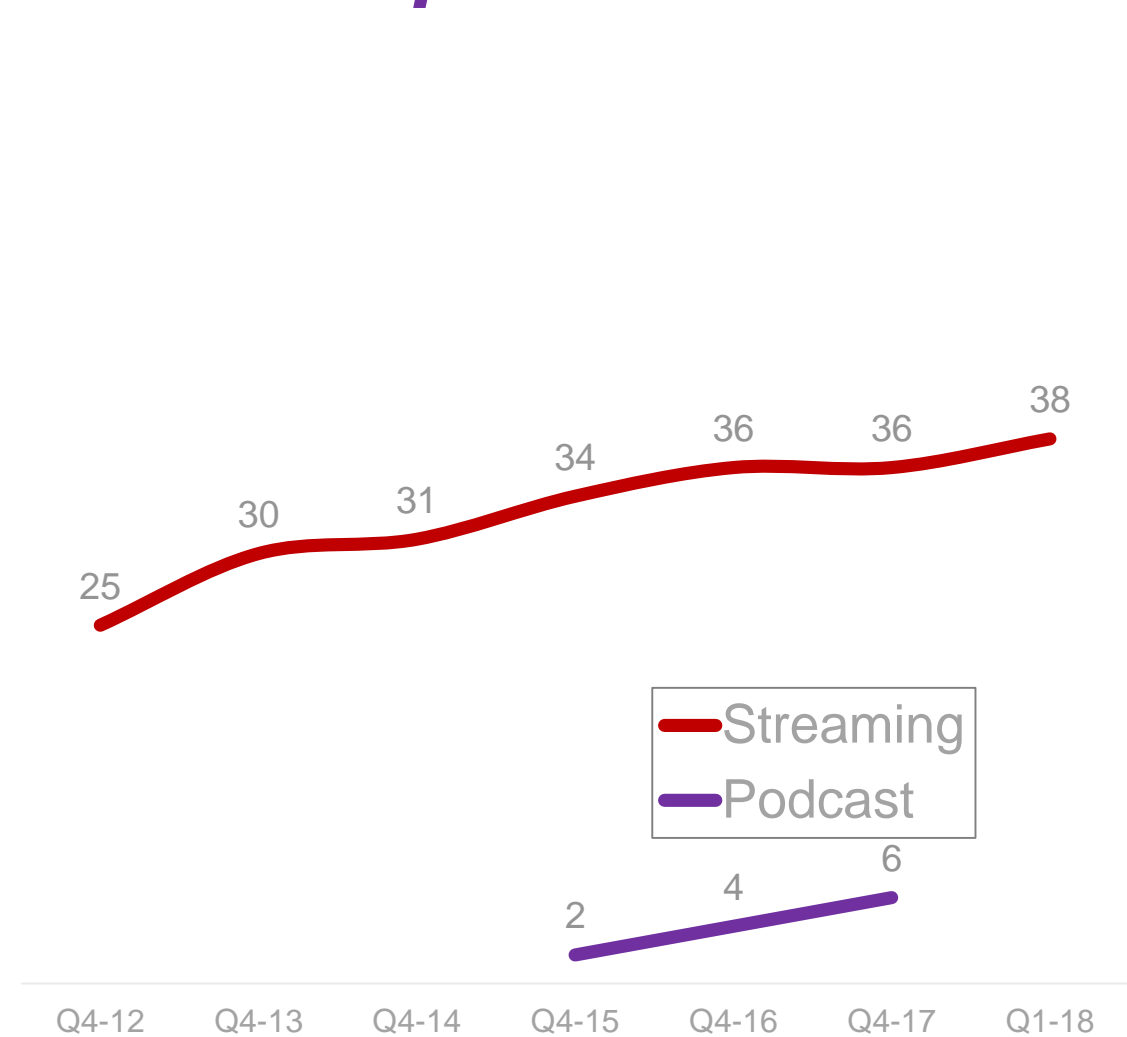
Daily listening time among all 2014-2016: *Decreased listening time from 2014-2016 – before the FM-switch off*



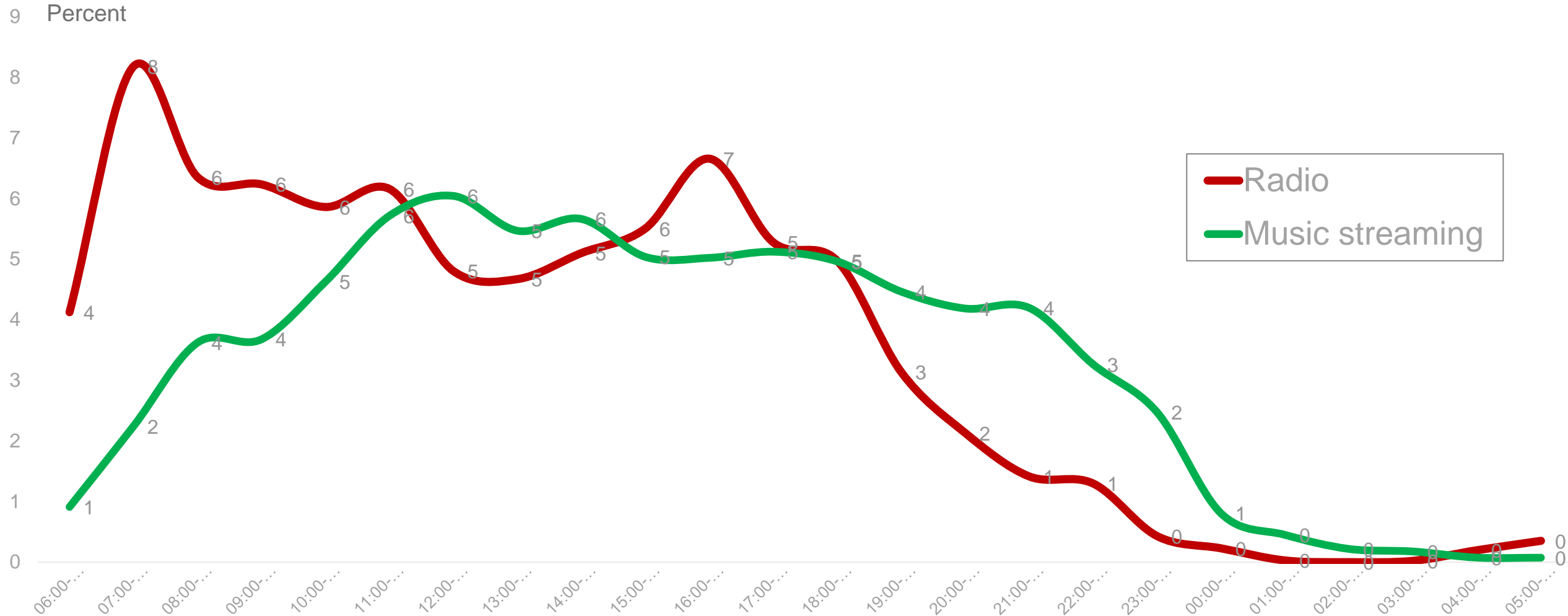
Access of streaming is growing



Daily use of streaming 38% and podcast 6%



Radio listening vs. music streaming among 18-29 years: *More radio in the morning and less in the evening*



Technology and disruption:

Opportunities and challenges for the radio industry

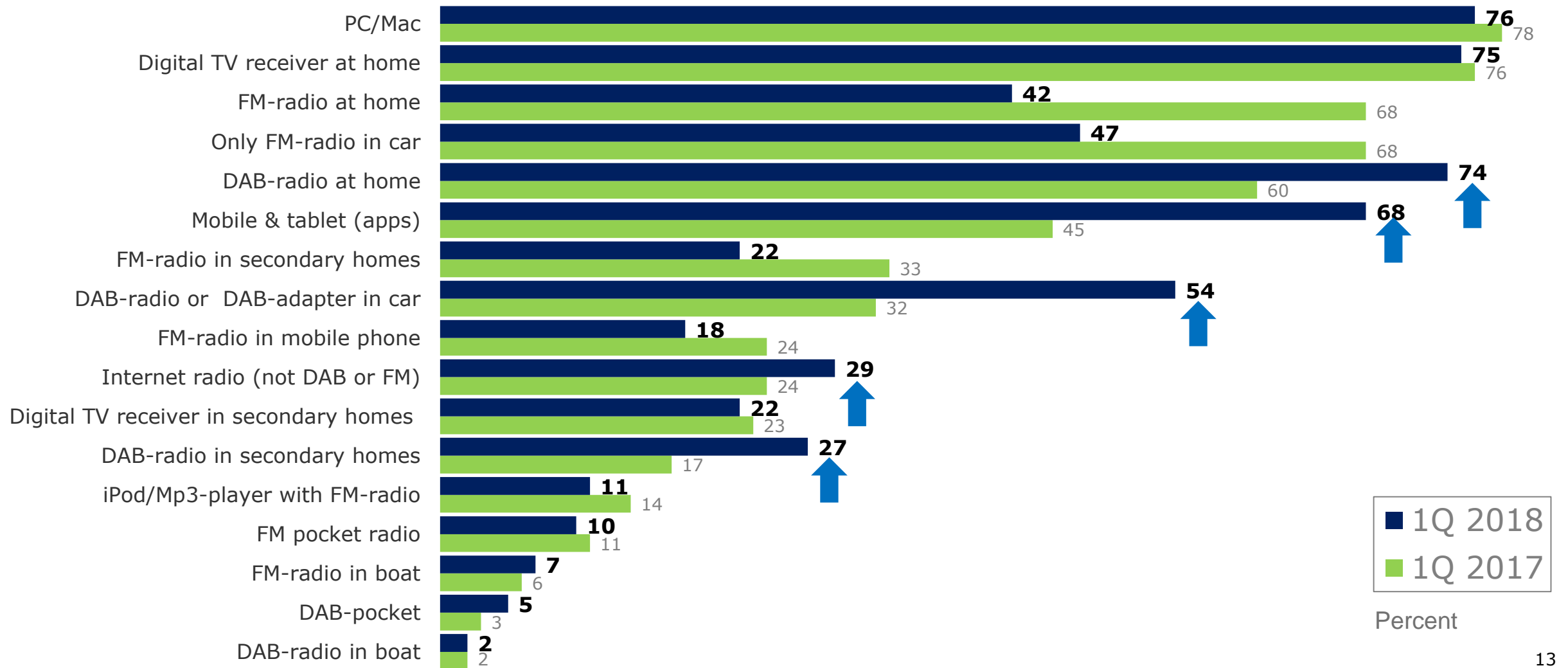
- 97% have online access
- 91% have smart phones
- 38% are streaming music daily
- 7% uses podcast daily
- 63% have access to headphones and 7% use them daily for radio
- The digital giants Apple, Google and Amazon
- Personalised radio services
- Smart speakers are potential game changers for radio?
- The battle of dashboard in cars and in digital audio devices

2.

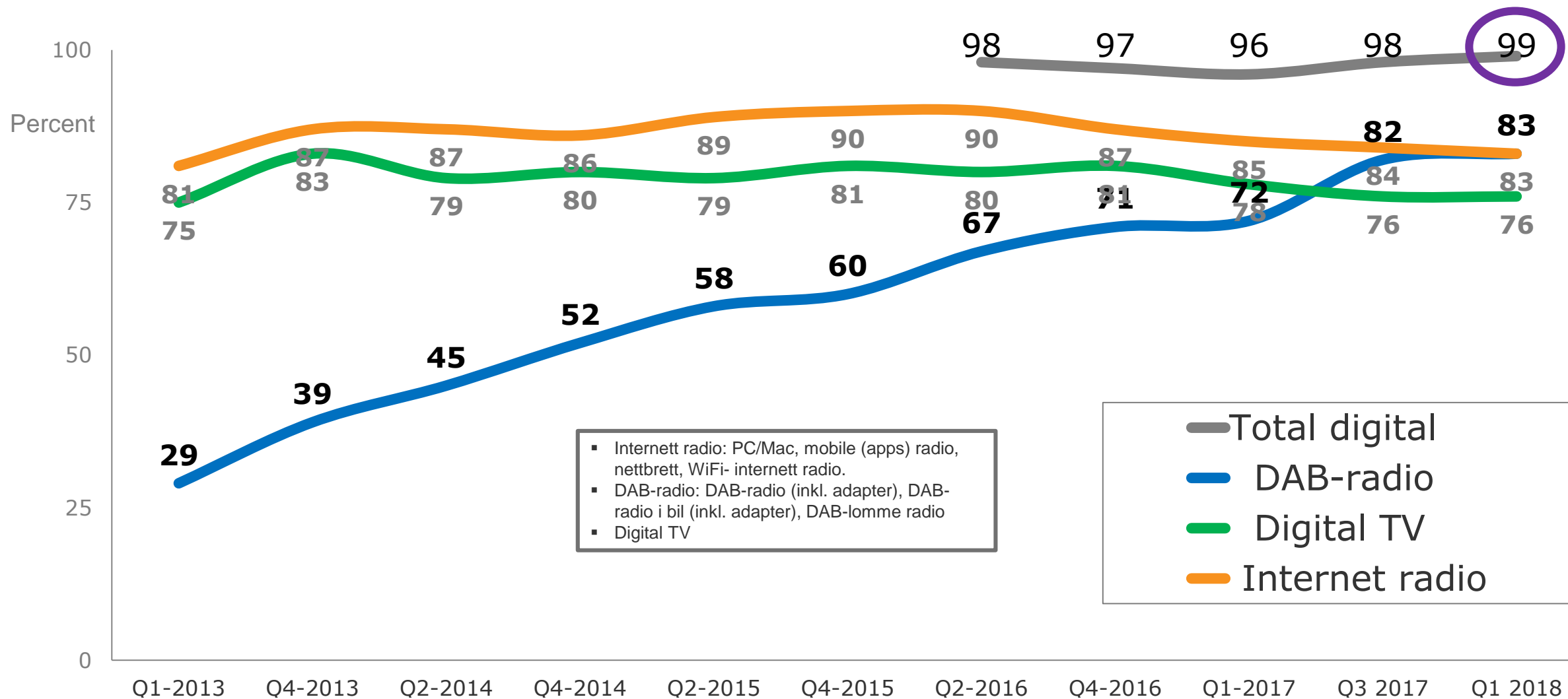
Diffusion of radio tech

Access to radio equipment:

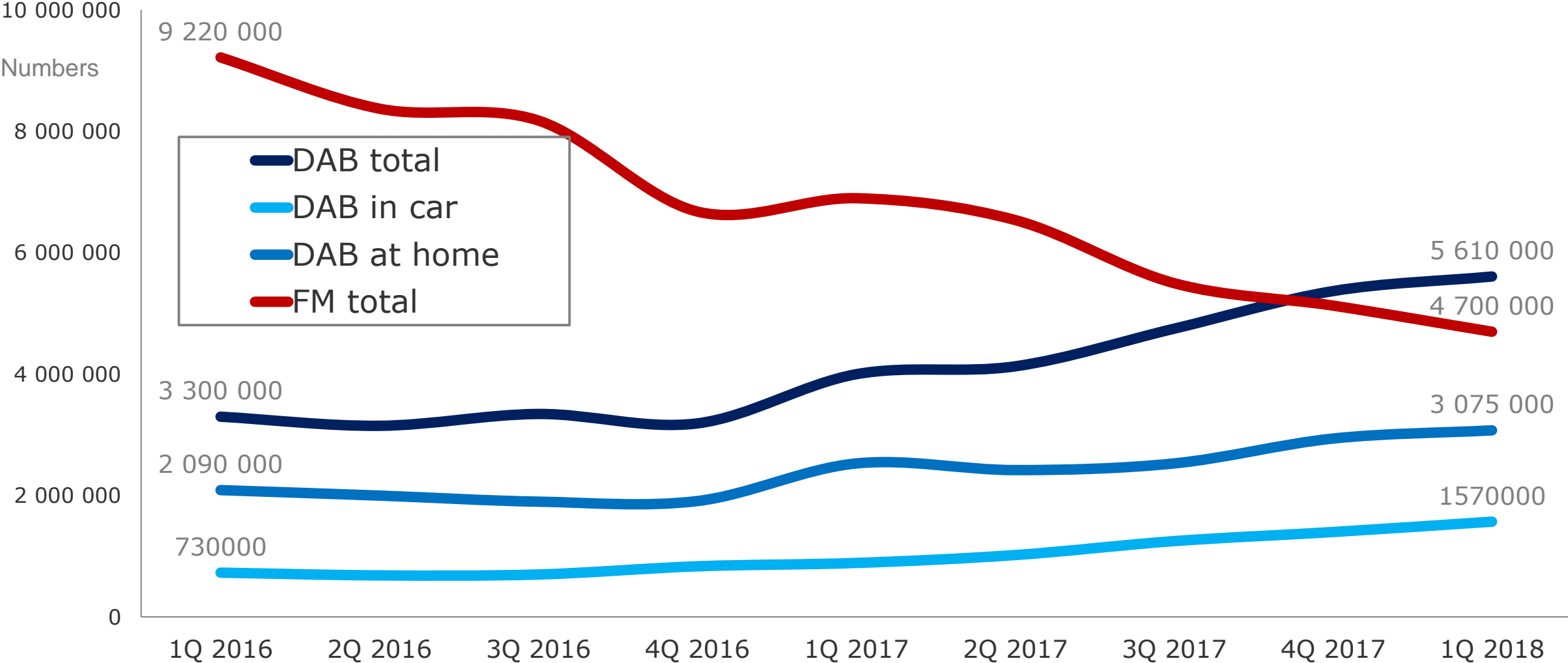
DAB and online equipment increases



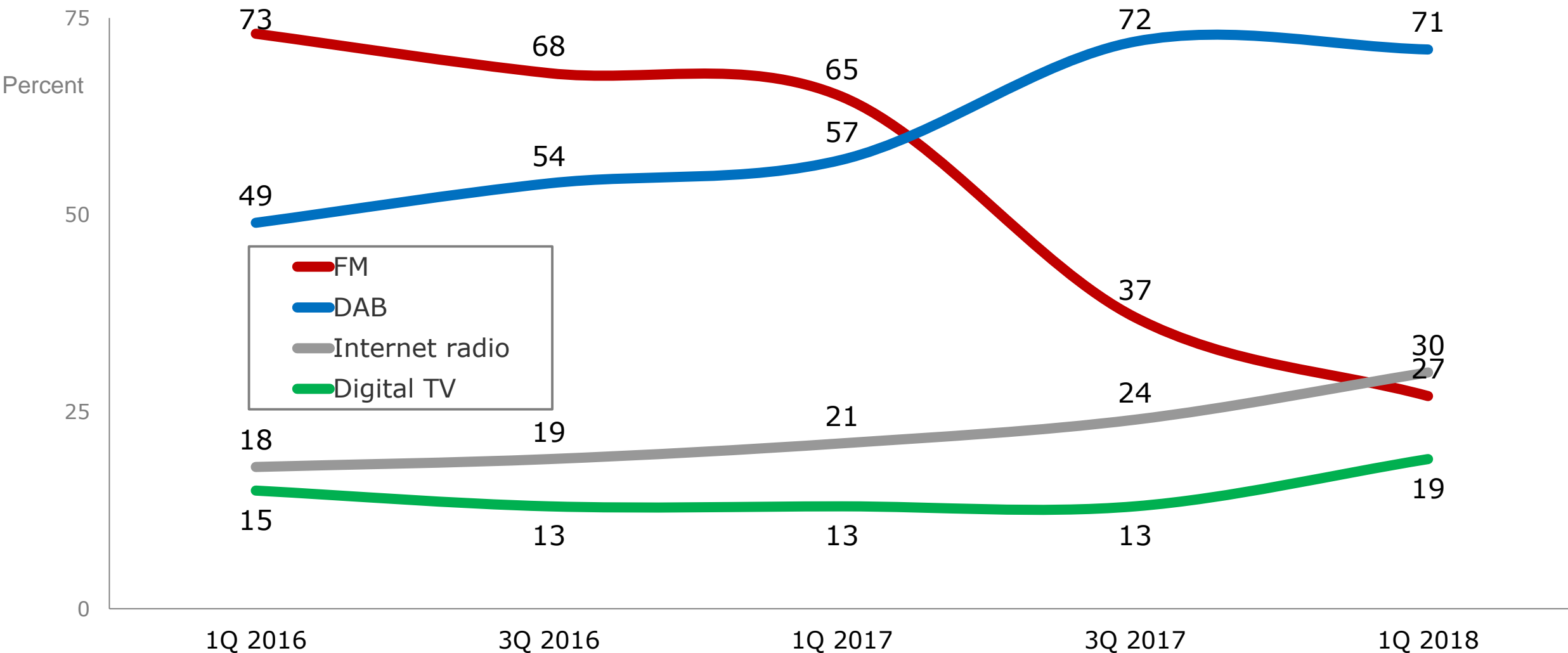
Access to radio to equipment: *High access to digital radio*



Number of radio devices: *Number of DAB devices increases, but 18% less devices in 1Q 2018 than 1Q 2016*

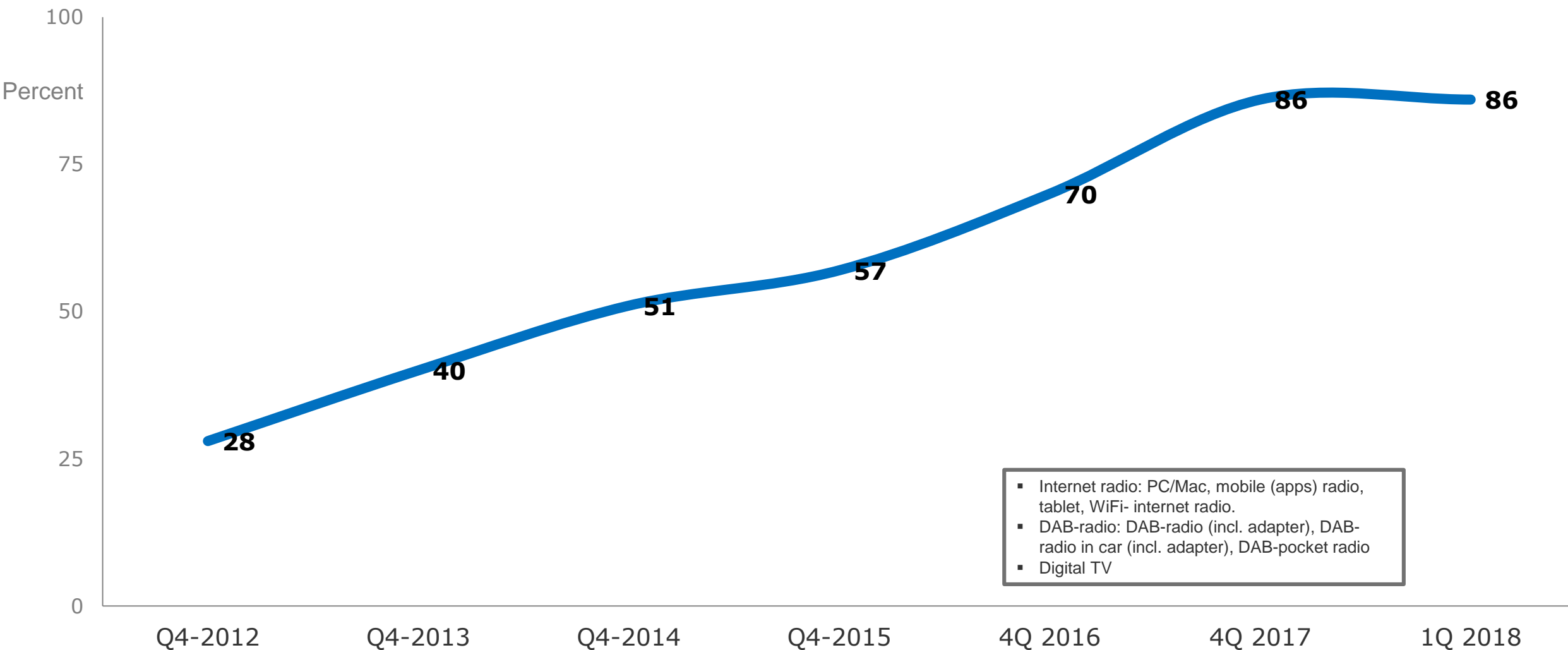


Amount of the daily listeners who use different devices: *More digital and less FM, but still 27% are using FM (local)*



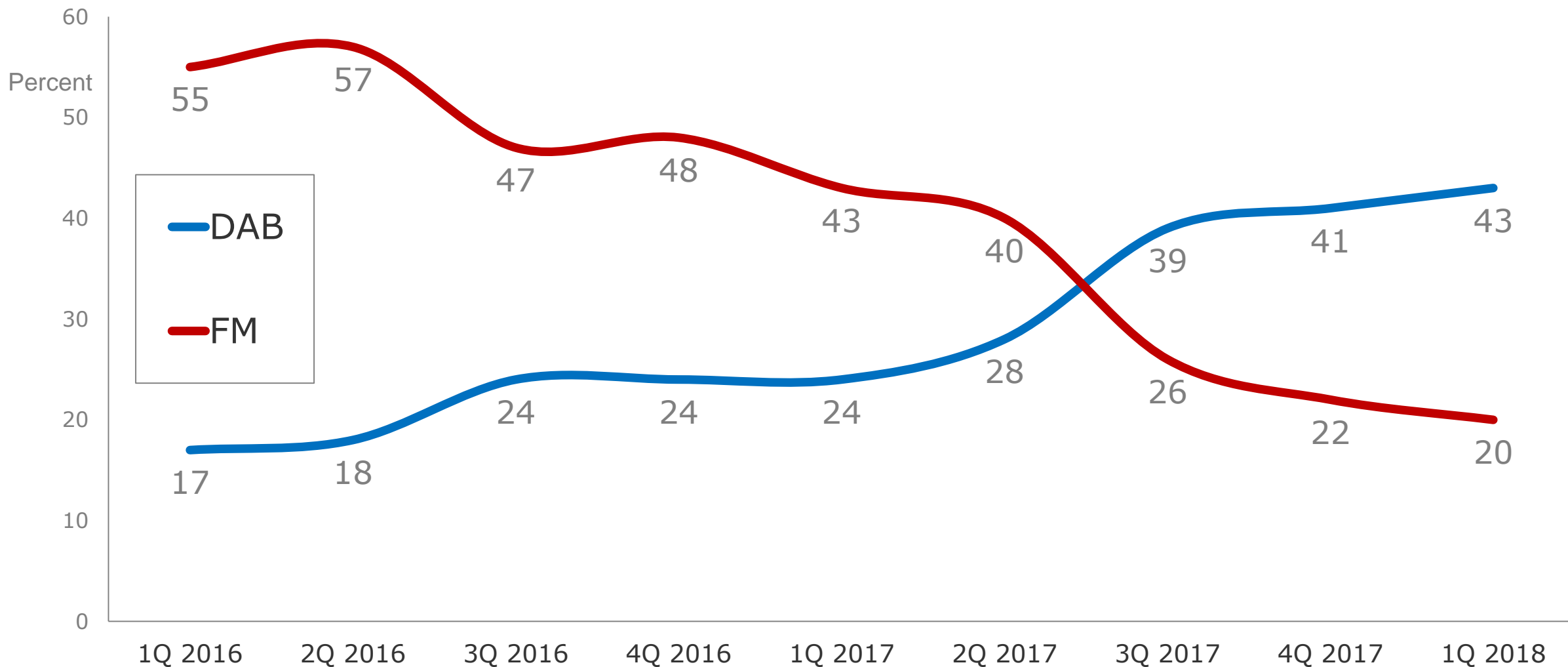
Amount of daily digital listeners:

86% of the listeners use a digital device



Amount of daily listeners who use FM and DAB in cars:

20% of the daily listeners are still using FM (local) in cars



3. Radio listening: 2016-2018

The national FM switched off during 2017



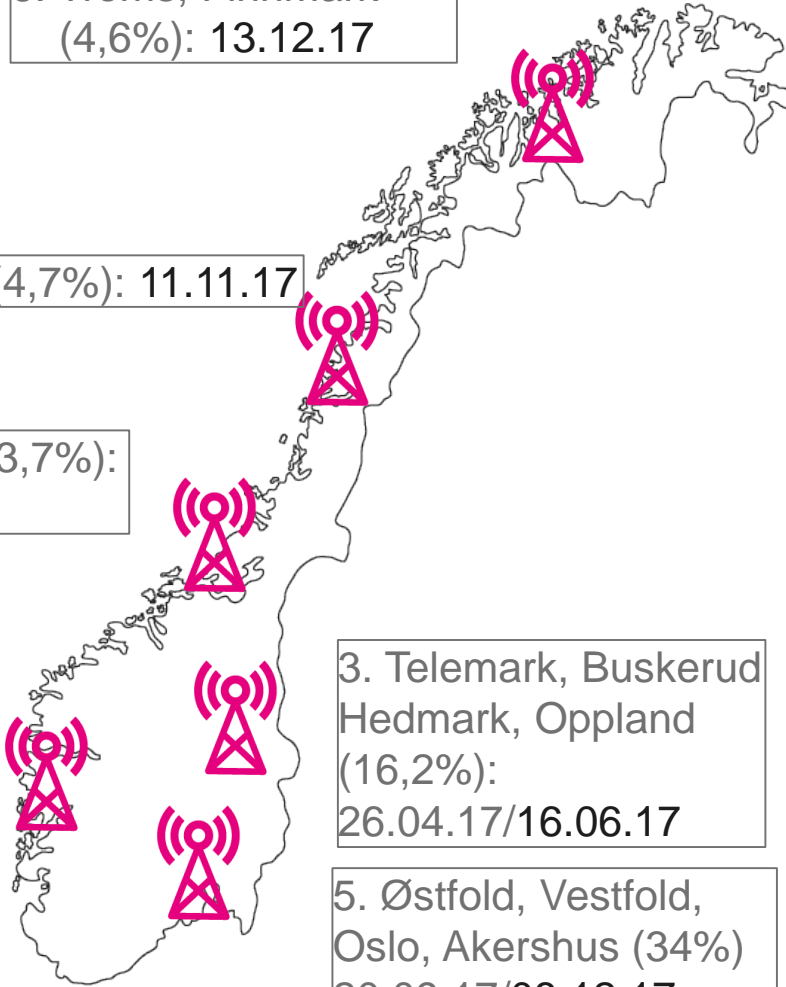
6. Troms, Finnmark
(4,6%): 13.12.17

1. Nordland (4,7%): 11.11.17

2. Trøndelag, M&R(13,7%):
08.02.17/21.04.17

3. Telemark, Buskerud
Hedmark, Oppland
(16,2%):
26.04.17/16.06.17

5. Østfold, Vestfold,
Oslo, Akershus (34%)
20.09.17/08.12.17



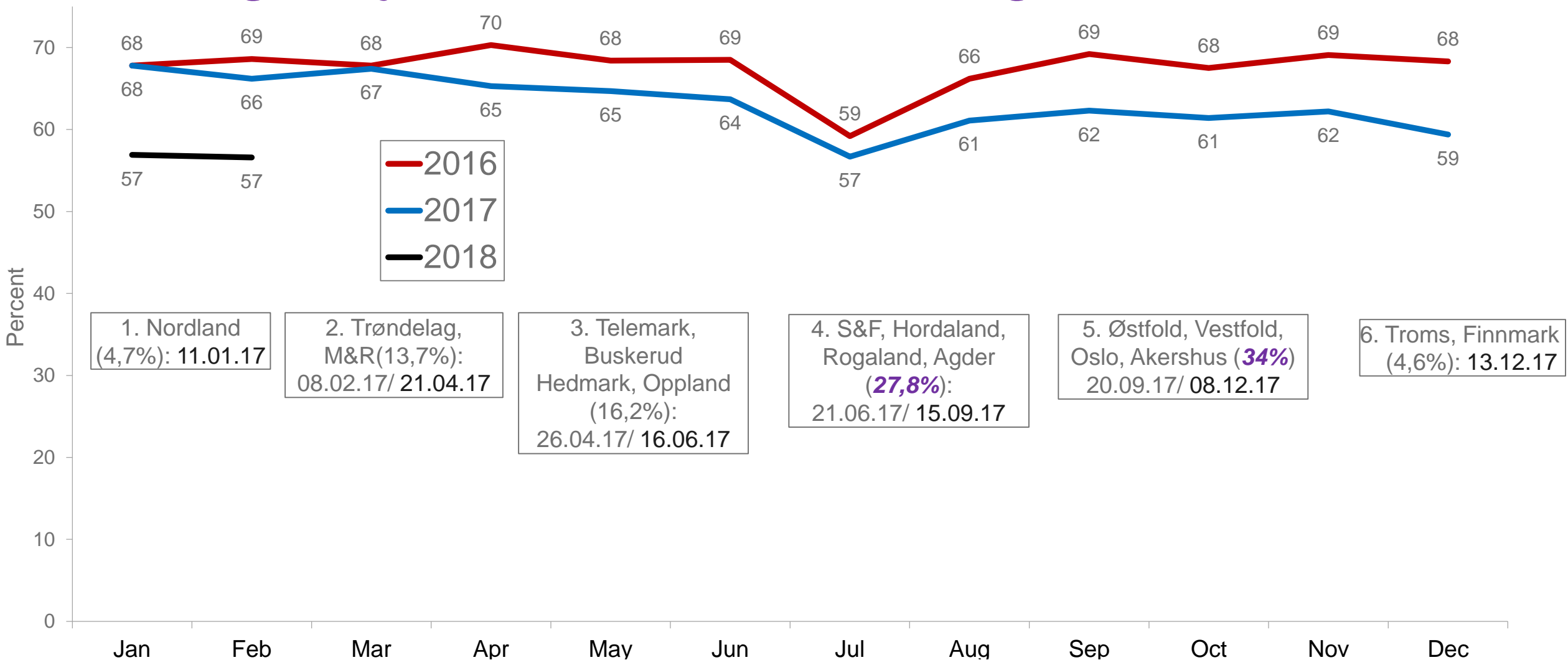
4. S&F, Hordaland,
Rogaland, Agder
(27,8%):
21.06.17/15.09.17

REGIONAL PLAN FOR FM SWITCH-OFF IN NORWAY



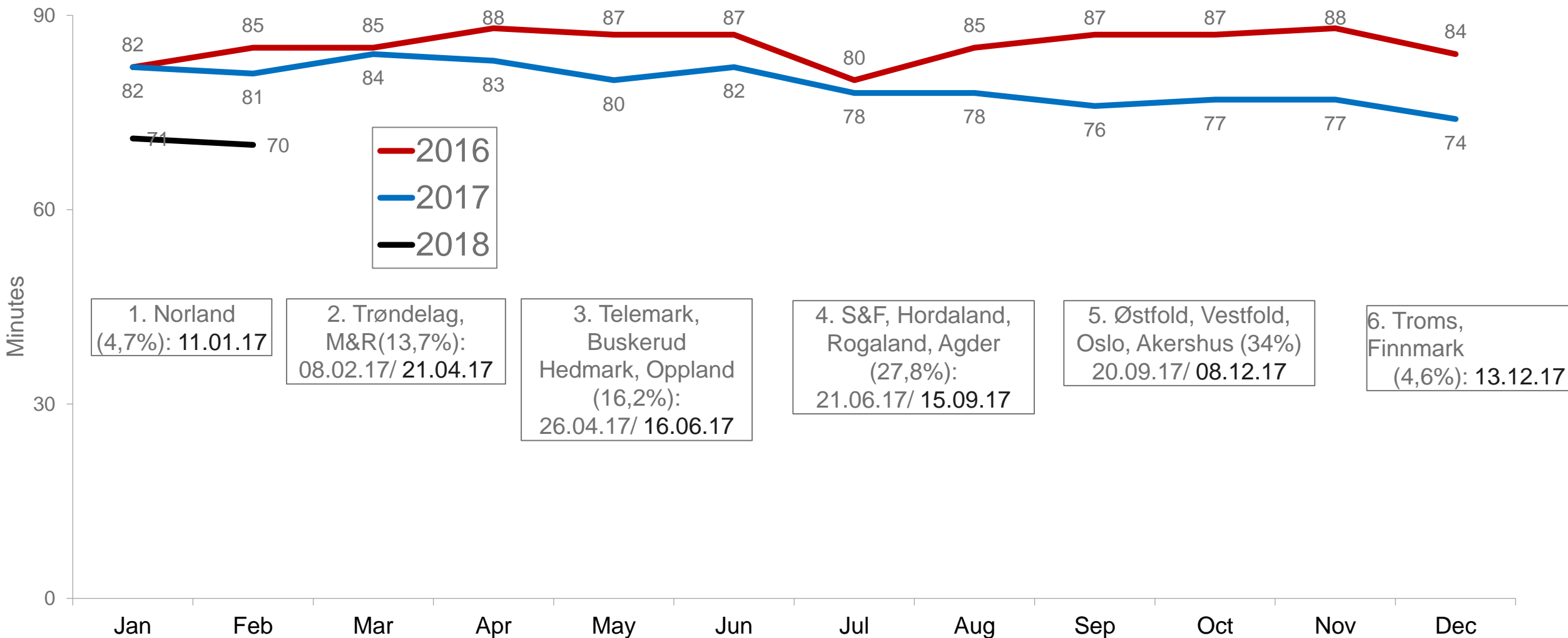
Daily reach 2016-2018:

Declining daily reach for radio from august 2017

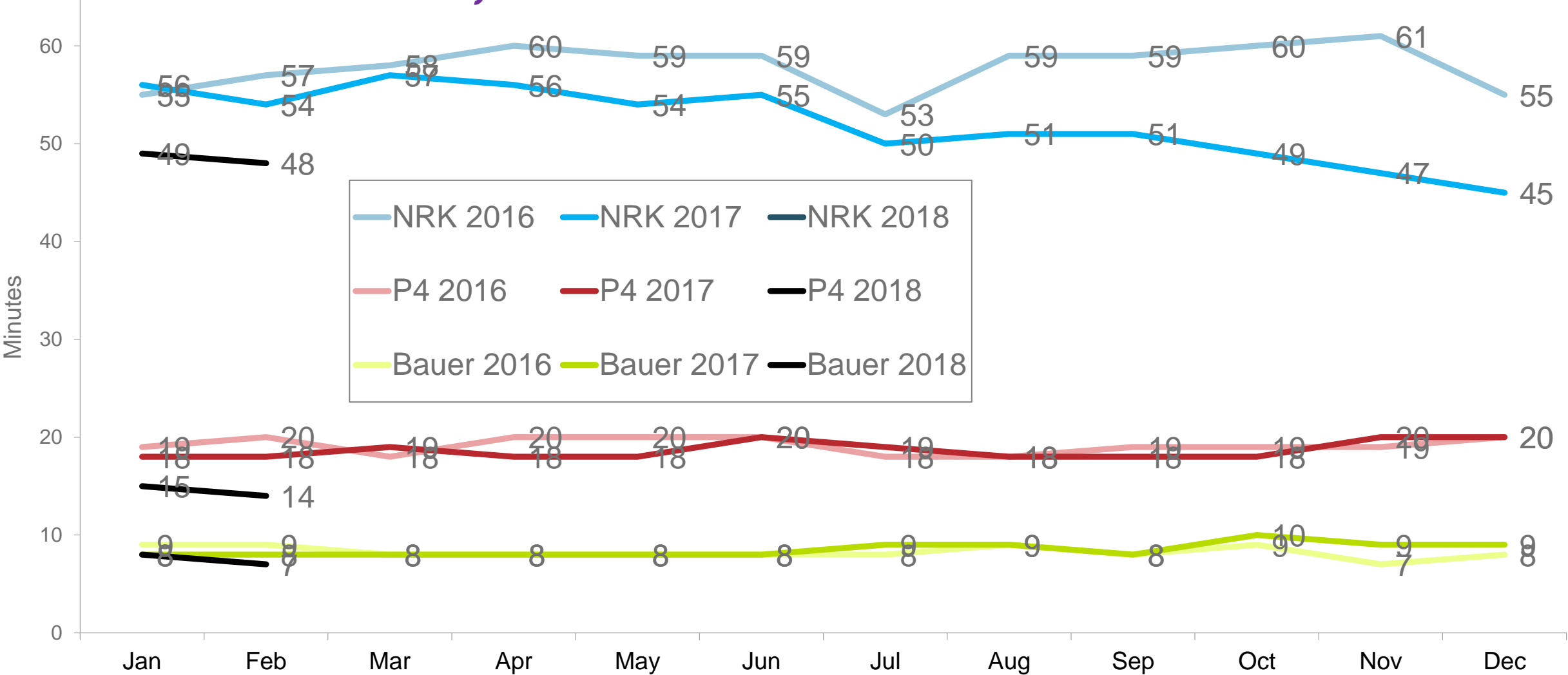


Daily listening time among all 2016-2018:

Declining listening time from august 2017

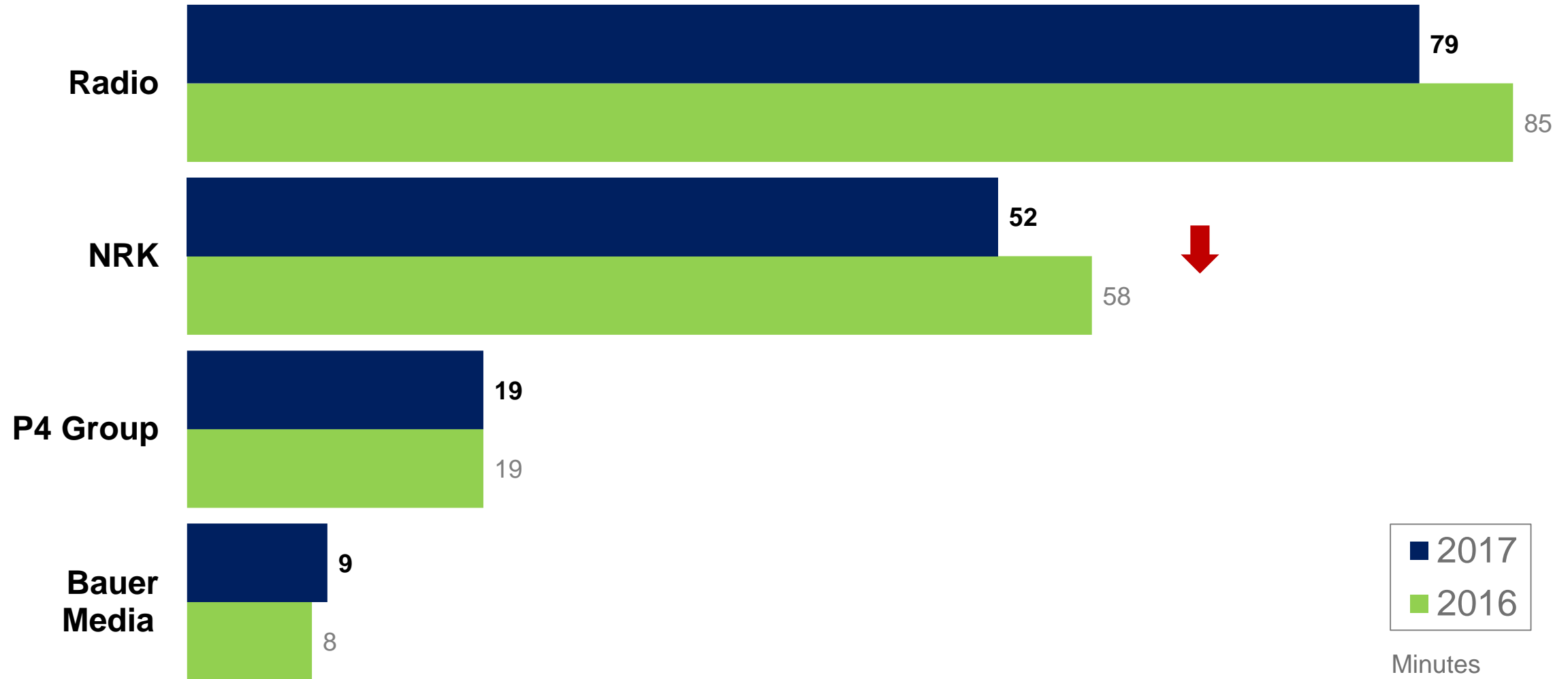


Daily listening time among all 2016-2018: *The listening time for NRK declines, while the commercial stations are stable*



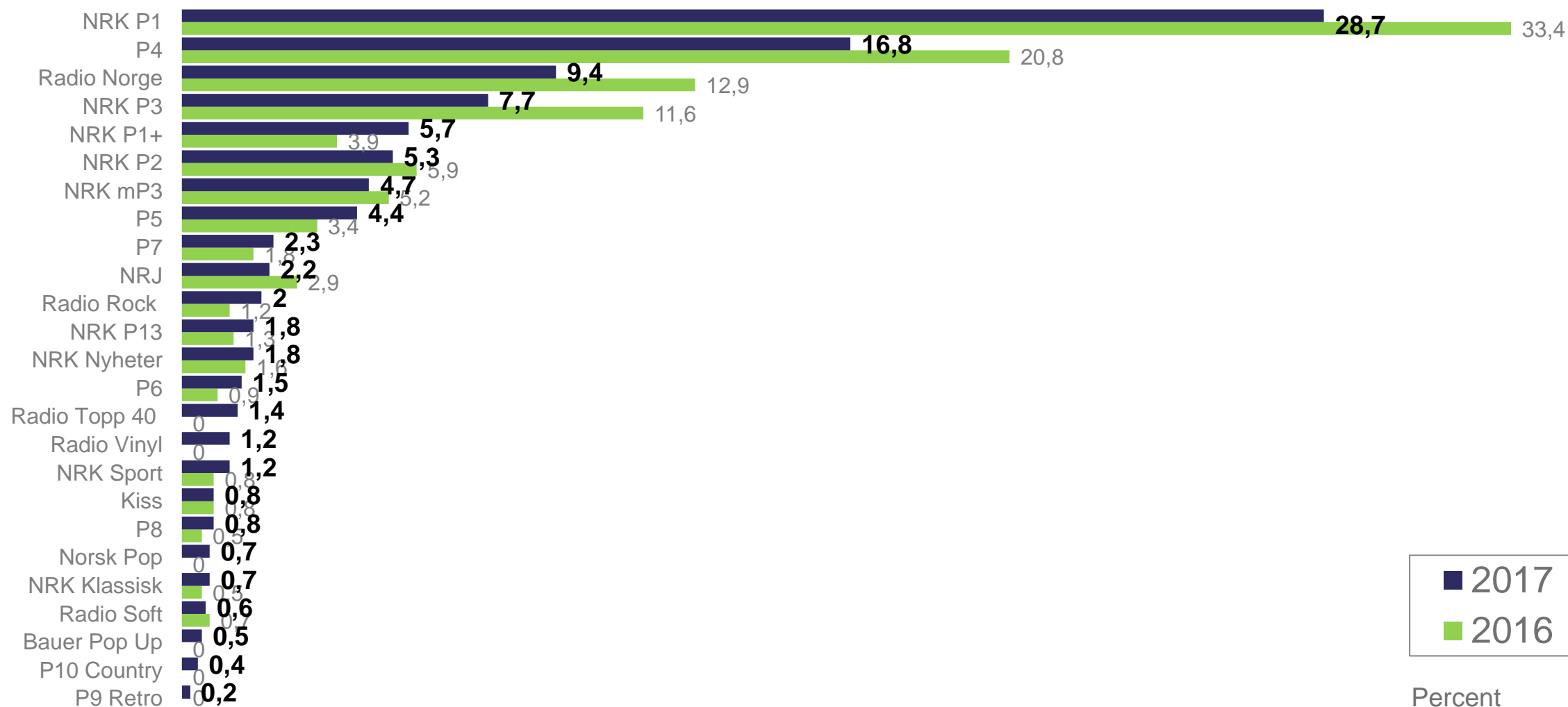
Daily listening time among all 2016 vs 2017:

NRK declines and the commercial stations are stabile

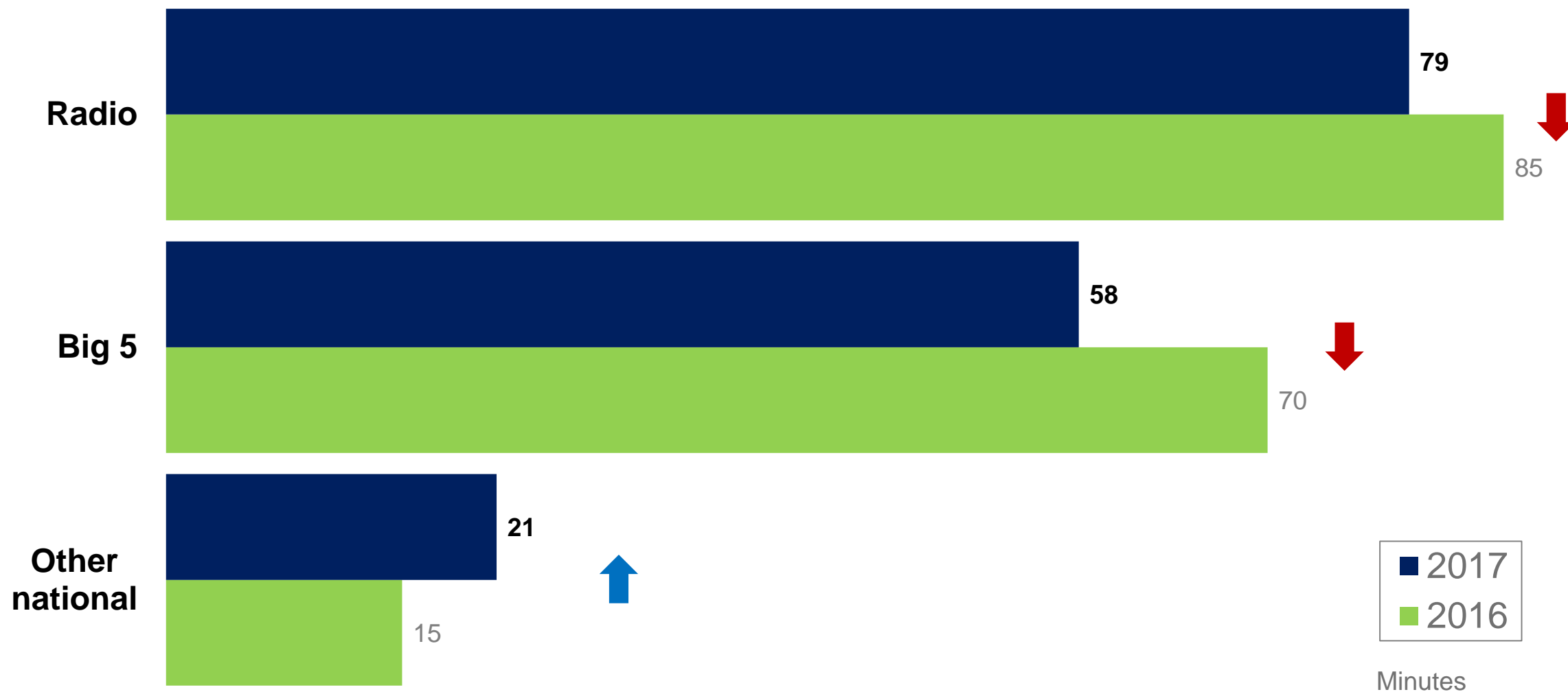


Daily reach 2016 vs. 2017: Fragmentation

The five big declines while the other increase

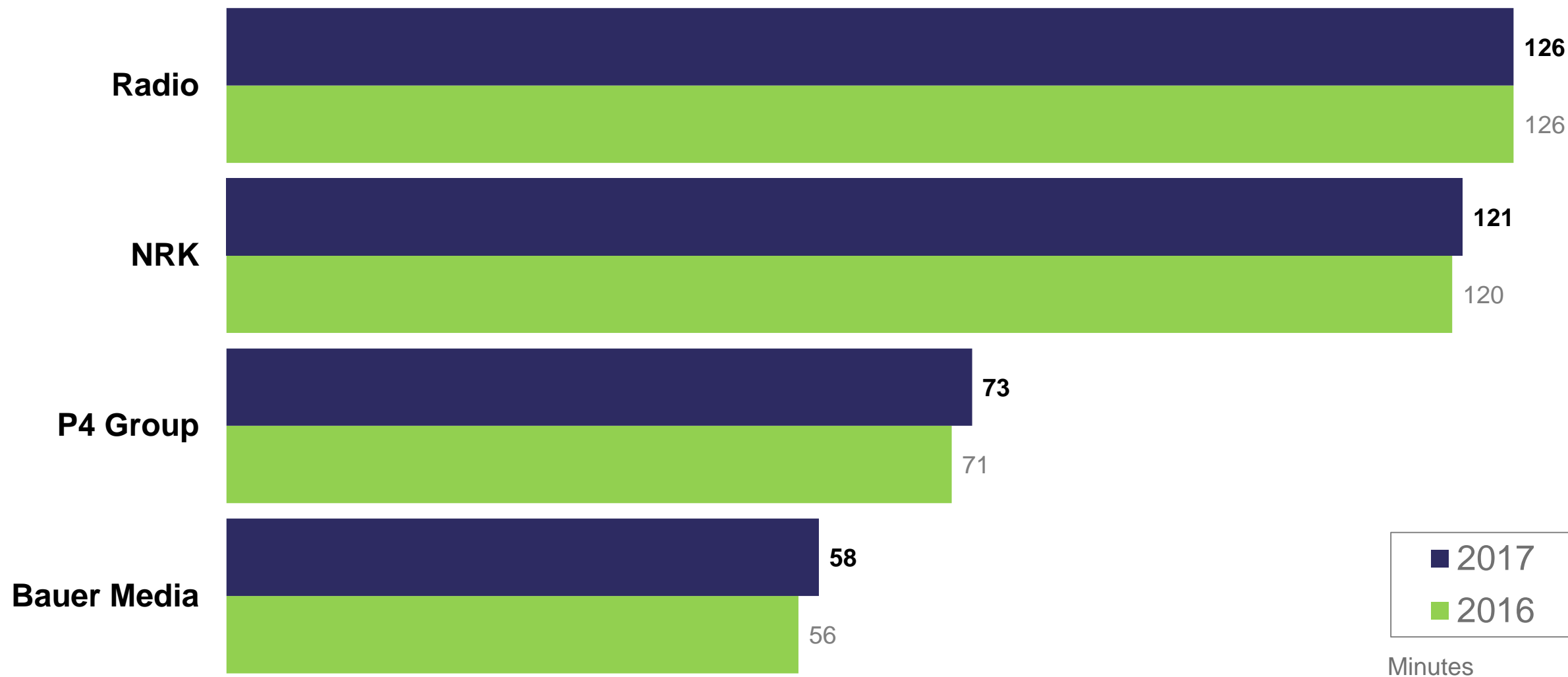


Daily listening time blant all 2016 og 2017: *The five big declines while the other increase*

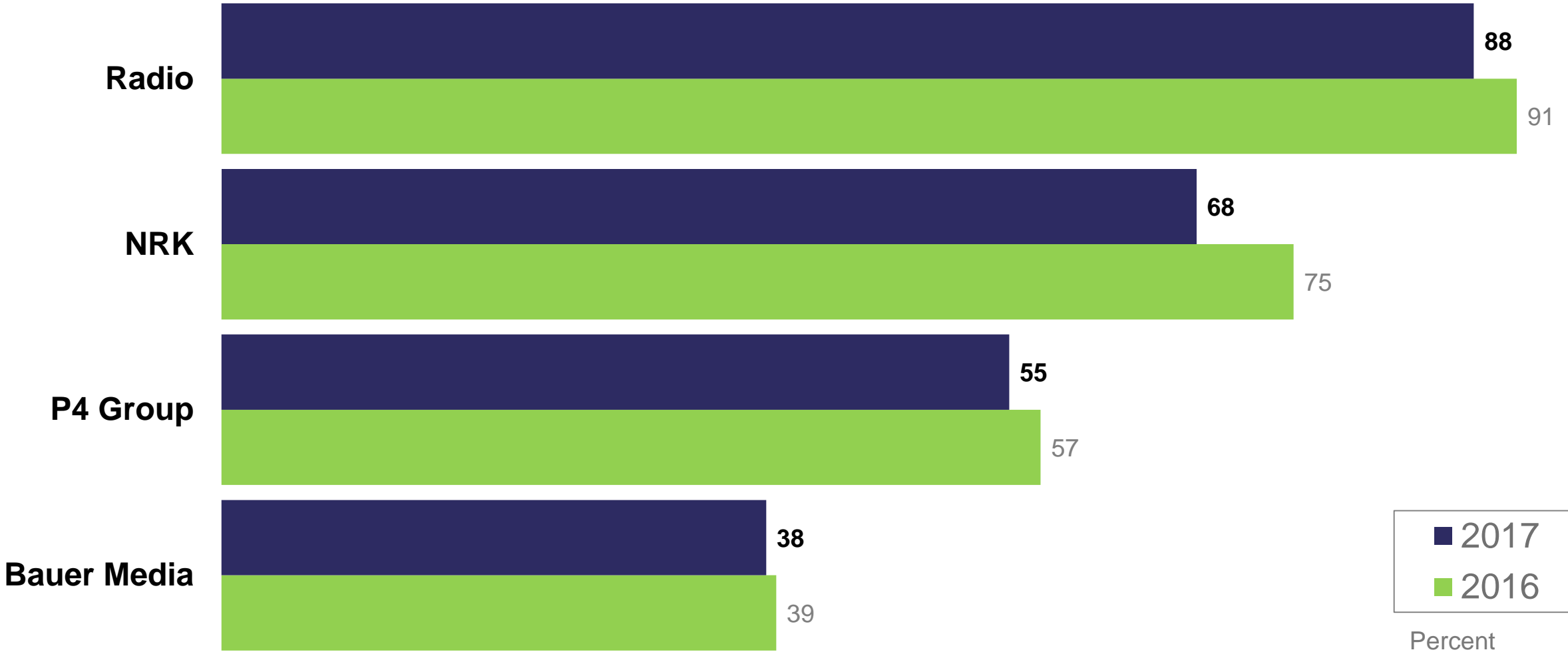


Daily listening time *among listeners* 2016 and 2017:

Stable listening time among listeners, growth for P4 Group and Bauer



Weekly reach 2016 - 2017: *From 91% to 88%* – *stable weekly reach for the commercial stations*



4. Summary and future perspectives

Summary: *Less radio listening in 2017 – the five big stations are declining while the small station are increasing*

- Norwegians are *digital leaders* and TV, radio and print have declining audiences.
- The radio stations meet *new competition from disrupting tech*.
- Everybody has access to at least on digital equipment for radio listening in 2018.
- ***BUT less devices at home, in cars and elsewhere than in 2016.***
- *The daily reach for the nation stations are as expected declining, .*
- *The listening time among the listeners is stabile.* The stations keep their loyal audience but have lost some of the sporadic listeners.
- *NRK has lost listener's in 2017 while the commercial station keep their marked shares.*
- *Fragmentation:* The five big are declining while the small station are increasing

A future proof strategy

- In the *personalized and digital media landscape* the radio industry must have tailored made content and service to meet the demand for different target groups.
- Radio stations and audio content have *to be available on all possible digital devices*.
- With 30 DAB+ station and new digital services the radio industry is prepared for the battle for *the car dashboards* and in other *audio systems*.
- *30 station and digital services* such as geo-located traffic information and weather services is definitely more future proof than five FM stations.

**Norwegian radios are fit for
the digital future!**

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