

Public Youth Radio in Europe

Executive summary



June 2008

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Introduction

The aim of this report is primarily to give an overview of EBU Members youth radio services, but also to describe the new media landscape, in which Members operate, by looking at sociological and economical trends important to the youth radio business; radio consumption trends, the digital music industry, Internet youth usage and new radio platforms.

A quantitative analysis have been based on an internal EBU survey and covers channel formatting, programming output, targeting and distribution strategies of their youth channels. It is also looking at the competitive youth radio climate, the offer of interactive services and successful initiatives, platform consumption and key media changes effecting radio. In-depth case studies have been carried out in addition to the survey analysis to give a more detailed description of Members' activities.

Overview

The media consumption among young people in Europe is shifting. Sociological trends and new technologies are increasing users' flexibility and the way they consume media. The market is becoming more and more fragmented and radio content is no longer limited to traditional transmission means.

The Internet boom has lead to fast pacing globalization of websites, and the new media landscape is becoming more personalized and diversified. New tools and techniques allow people to access digital content online and the user choice and online competition is greater than ever. Music portals are being launched, with digital music collections available through streaming, and online networks make it easier for users to build their own media content and share it with friends. Online communities like MySpace, Bebo and Facebook are making content deals with large media companies to be more attractive to younger users.

According to some measurements about 80 per cent of the Internet traffic comprises illegal downloading on P2P networks. A large part of the downloaded content is music, which has created a crisis in the record industry. The music sector has been forced to adjust to the new media landscape and build new business models based on innovation, experimentation and diversity. New platforms and products are in focus to create new digital revenue streams. The increasing penetration of broadband, mobile phones and portable devices has driven the rollout of new digital music services and the great usage of portable media devices has created an 'always on, anywhere' music environment. Instant access and portability is becoming the norm¹. In this open media society it is getting harder for companies to get the attention and time of consumers.

¹ IFPI, *IFPI Digital Music Report 2008*, January 2008

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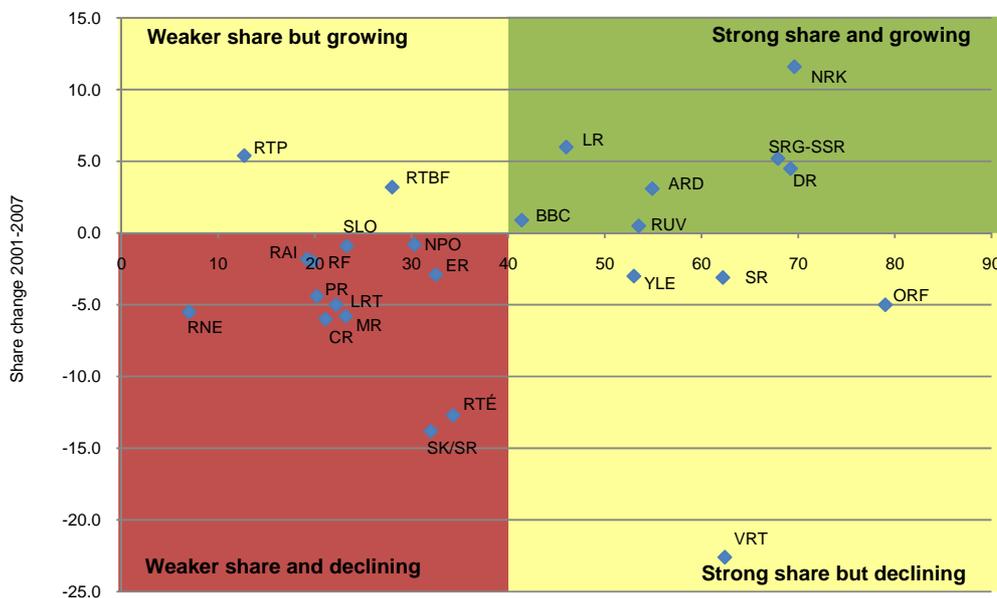
Radio audiences

The audience share for public broadcasters is decreasing year-by-year and trends from several European markets show that the total audience is getting smaller. People spend less time listening to radio than they did five years ago, however, the medium remains impactful with high reach and listening time. It is easier than ever for people to access music and niche content through the Internet and online radio consumption is increasing. There is an opportunity for Members to increase the distribution to new channels and become more multimedia focused, increasing flexibility for listeners.

The table below shows the audience share development during the past six years (2001-2007) for Members' generalist channels. The four quadrants picture the balance between the average audience share and the six year evolution. The red quadrant shows organisations which shares are declining, and compared to others are rather weak, while the green quadrant shows organisations with a positive development and relatively strong shares.

Even though a number of Members show positive developments many can still be found in the red zone, meaning they have lower than average shares with a declining trend. Most common causes to these declines are competition from commercial, analogue channels, regulatory changes, funding issues as well as sociological changes in media consumption.

Radio audience share evolution – national channels (2001-2007)²



Source: EBU

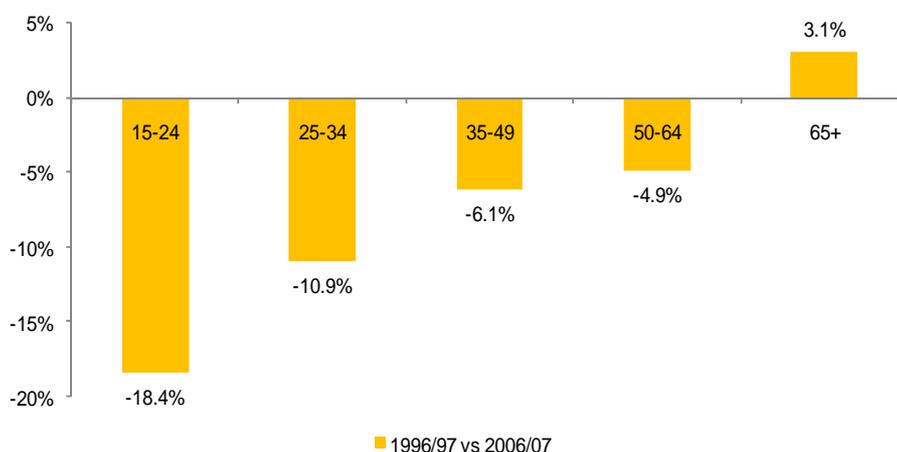
² a) For Austria, the figures include all 9 ORF Regional stations together, a network which covers the whole national territory
 b) Since the German market is almost entirely regional the total sum includes the 9 regional networks
 c) Norway: From May 2006 the method for measuring radio was changed from CATI to PPM for the national market. The market shares for 2006 above are for the period May-Dec 2006. The universe also changed from age 9+ to age 12+.

For comparability, the chart depicts combined national radio shares only. Some countries, like the Netherlands, reach very large audiences through regional distribution.

Youth radio listening

Radio audiences are getting older and the market is becoming more competitive and fragmented. Music is the key driver of youth radio and due to the wide distribution and easy access of digital music it is hard for public youth channels to reach their target audience. Looking at the overall trend of radio listening in France the decline proves to be the greatest among youths. More than 18 per cent of the 15-24 year olds listen less to radio today than they did ten years ago. The same trend can be seen for all age groups except the 65 years or older. Combining the two youngest age groups gives a decline of almost 30 per cent, which is worrying as most public youth channels target listeners aged between 15 and 35.

Youth audience decline - change in time spent listening in France (1996/97-2006/07)



Source: EBU based on Radio France

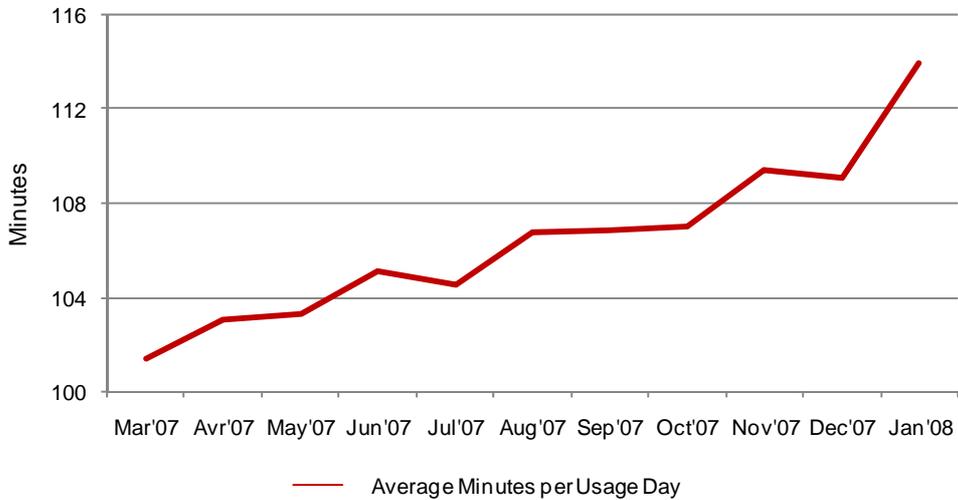
The same trend can be seen in some of the Nordic countries, for example in Denmark where the listening among 12-29 year olds has declined with almost 40 per cent since the late Nineties.

Online youth consumption

The trend is reversed with regards to youth Internet usage. Young people spend more and more time online and the computer has become a natural part of their everyday life. It is used for practical reasons like bank transfers and search of information, but to a high extent for entertainment and media consumption. The table below shows the increasing online usage among young people in Europe. Youths spend on average 106 minutes online every day and the most popular web property is YouTube, owned by Google.

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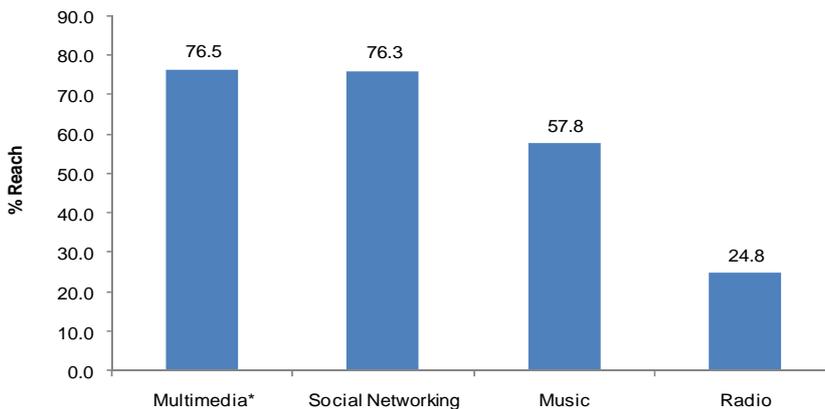
Online usage among 15-24 year olds



The high online consumption is driving the on-demand content market and podcasting and streaming is growing in popularity. Most radio channels today offer some kind of streaming and podcasting services but all content is far from being provided. Young people are used to find most online content, video or audio, either through legal or illegal downloading and the combination of free, flexible and always available seem to be important for the future of youth targeted content.

In the past couple of years social networking and video sharing sites have rocketed and Internet has become an arena for social media. More than 75 per cent of all 15-24 year old Internet users in Europe visit interactive media sites every month, with audio and video being the main drivers. Data suggests that music sites attracts almost 60 per cent monthly reach and radio sites about 25 per cent.

Reach of online categories – 15-24 year olds (Feb'08)



* Multimedia - sites that contain video clips, audio clips or some other kind of interactive media such as shockwave/ flash etc.

Source: EBU based on comScore

Online radio services

The Internet has opened up for a great choice of digital music and the spread of portable devices is driving consumers' demand for music to an all-time high. Millions of tracks are available through major online services and over 500 legal and licensed music websites are registered globally. Recent research shows that music is the most popular form of entertainment, significantly out playing TV and cinema³. Users have a greater music choice than ever before and youth targeted radio channels, with music as the main audience driver, need a strong online presence to be available when, where and how users want.

Many analogue radio channels have already launched streaming and podcasting services, along with hundreds of smaller online-only operators. Some commercial companies have launched pre-programmed radio downloading services, financed by subscription fees, for users who do not want to look for the content themselves. Pandora, Last.fm and Slacker are some examples of online radio services based on interactivity combining social networking technologies with data mining and music analysis to help serve users needs and music tastes. The business models used differ as well as technologies used to match content with personal preferences.

Last.fm

The Last.fm interactive service was launched in 2003 and has since then built up an important audience base with more than 15 million active users. The site was acquired by the American broadcaster CBS in May 2007, a takeover that resulted in a restructuring of the site offering users streaming services of entire music titles. The service is built up around knowledge and experience based on user behaviour rather than on recommendations from musicologists song analysis. Users are asked to install software, which is then used by Last.fm to track songs and tailor them against suitable radio services. This song counting technique is called scrobbling⁴.

So far about 65 million tracks by 8 million artists have been counted in over 200 countries. The site promotes itself like a social networking site as it is based on user behaviour and invites user interaction. People signed up to the service can match their music taste against other users and exchange information. "*Last.fm connects you with your favorite music, and uses your unique taste to find new music, people, and concerts you'll like.*" Users can access popular tracks, artists and videos and free downloads are made available each week. Downloads can be selected on a genre basis.

The catalogue includes content from the four main music companies as well as from thousands of independent music labels. The service also contains user-generated content and gives room for new and unsigned artists to promote themselves by uploading their music. The site has licensed all four major label companies for free, on-demand, ad-supported music, which gives them the

³ IFPI, *IFPI Digital Music Report 2008*

⁴ www.iht.com/articles, *Web music On the threshold of a stream*, 29 March, 2007

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possibility to launch a free music feature. This feature has seen great success in the US with a 58 per cent growth in the unique visitor base a few weeks after launch. Last.fm founders say that “free is the future” and that the free on-demand streaming is a powerful value proposition for consumers and the key catalyst of the growing online traffic. The success of the service has also been boosted by successful cross-promotion events on radio and TV in relation to relevant music events. The free on-demand service is currently available in the US, Germany and France but is planned to be rolled out globally this year⁵.

The BBC is one public broadcaster that has launched collaboration with Last.fm and the youth channels Radio 1 and 1Xtra can both be found as special channel pages. By distributing the content on this popular youth site the BBC tries to lead users to its free-to-download podcasts and it is also a way for the channels to reach new listeners and make the brands visible⁶.

Slacker

This new service, currently available in the United States, was launched in March 2007. It promotes itself like a personal radio offering users music without doing any work. The service has a free software player and a portable iPod like device. Users can choose the songs they like and Slacker will choose corresponding radio streams based on their preferences. DJs will also help in the customization process. The portable player carries personalized radio content with a monthly subscription fee of \$7.50 and users who do not want to pay can buy the portable player and access radio streams, however, rich with advertising. The radio content is organised around genres and sub-genres containing thousands of stations.

Slacker has signed content deals with two of the major music labels, Sony BMG and Universal Music Group, which will supply tracks to the new, ad-free premium radio service costing \$3 per month. Along with these deals licensing agreements have been signed with hundreds of independent labels. The Slacker service is unique with its personalized portable radio service, offering Wi-Fi and satellite music distribution. The owners' objective is to make the service available on a broader range of devices in the future⁷.

AOL Music and Radio

The American global Internet service AOL has one of the most popular online music services. The site has increased its website traffic significantly the past year, growing the unique monthly visitor base from 2.5 to 13.5 million in Europe in one year⁸. The AOL web property is featuring a range of properties and one of the most popular is AOL Radio, offering more than 200 free online radio stations. Through a new agreement with Last.fm, owned by CBS, AOL wants to re-launch and empower its European online radio services. Last.fm users will have the possibility to listen and

⁵ PRNewswire-FirstCall, *Last.fm becomes fastest growing free online music network in the U.S.*, February 22, 2008

⁶ www.iht.com, *Web music On the threshold of a stream*, 29 March, 2007

⁷ www.slacker.com

⁸ comScore media metrix, April'07-April'08

repeat tracks and can also access content like videos, event information and images⁹. A new on-demand service will be made available to users in France, UK and Germany with plans to roll out across Europe in the coming months. Earlier this year AOL signed a deal with CBS, which is providing AOL with 150+ radio channels in the US market.

Digital music distribution

2007 was a bad year for the music industry and even though the digital music sales keep on increasing on a global scale it does not cover up for the losses in traditional CD sales. Record companies are losing income and need to find ways to generate new revenue streams. The usage of portable devices in combination with illegal downloading, using P2P technology, and online music sales, through properties like iTunes, creates a new dimension to the availability of content. The market is becoming globalized and Internet users can access niche content on international sites and are no longer limited to national websites. European governments are striving to find ways to stop illegal music downloading and record labels are making deals and license agreements with online music portals to supply users with a legal alternative to practically unlimited digital music access¹⁰.

Consumers have a greater choice than ever to consume music content, with greater flexibility and availability. Music sales are moving towards online and mobile and in the US 30 per cent of all recorded music is sold by online or mobile means. The UK and Germany top the global sales of online digital music, while in France and Italy the major market channel is mobile.

Top 10 digital market channel sales

	Country	Online	Mobile
1	USA	67%	33%
2	Japan	9%	91%
3	UK	71%	29%
4	South Korea	63%	37%
5	Germany	69%	31%
6	France	39%	61%
7	Canada	58%	42%
8	Australia	59%	41%
9	China	27%	73%
10	Italy	44%	56%

Source: EBU based on IFPI

Recent figures show that broadcasts and legal downloads of music have, for the first time, exceeded copyrights from CD sales in 2007. Fees from online outlets and broadcasters are becoming increasingly important to musicians and publishers, increasing with seven per cent last year in the UK¹¹.

The four major music label companies have all signed partnership deals with YouTube, which gives users the possibility to embed specially provided content into personal videos. By increasing the

⁹ MediaPostPublications, *Last.fm powers AOL's Internet radio in Europe*, May 2008

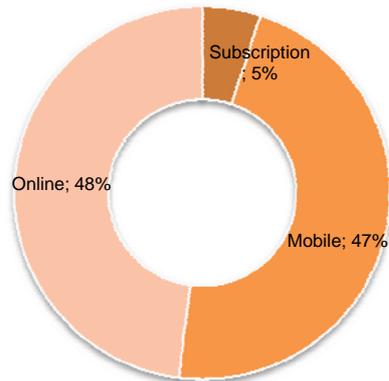
¹⁰ IFPI, *IFPI Digital Music Report 2008*, January 2008

¹¹ C21 Media, 19 February 2008

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availability and giving users easy access to discover new music, record companies hope to generate increased revenues. The collaboration gives YouTube value added music content while music companies can use the site as a powerful distribution channel and also track usage. Both parties also gain additional advertising revenue. The most common business models seem to be advertising-supported streams with payable downloads.

Digital music revenue source



Source: EBU based on IFPI

Ad-supported services are often based on licensing agreements. Social networking sites are becoming important partners not only for labels but also to well known and unestablished artists. It is becoming a growing source of music discovery¹².

Major music labels are seeking new ways to drive revenue and are increasing their content distribution through social networks, direct-to-consumer sites and brand partnerships. Telcos, broadcasters, social networking sites, mobile companies and ISPs are all interested in building business proposals around music and are trying to define a profitable business model and to set-up strategic partnerships to maximize their content distribution¹³.

MySpace Music

My Space, owned by the media company News Corp., is one of the most important social networking sites with more than 27 million unique visitors in Europe in January 2008. The site is in discussions with leading record companies EMI, Sony BMG, Universal Music and Warner Music to launch an advertising-supported service that would allow users to listen to music for free on their computers. The music will be offered through streaming and revenue would come from advertising sales based on the Internet traffic. To download a song users would have to pay. The business model is, however, not yet confirmed by MySpace¹⁴.

QTrax

¹² IFPI, *IFPI Digital Music Report 2008*

¹³ IFPI, *IFPI Digital Music Report 2008*

¹⁴ FT.com, Jan 24, 2008

In the beginning of the year this free digital music service, based on the P2P technology, was announced as an alternative to illegal downloading. The service is ad-supported, but content free of ads, and users can combine tracks and artists as they like. It operates on a legal basis and announced in spring 2008 an agreement with Universal Music Group and EMI Music. A representative from EMI said that *“EMI’s music will be available free to registered Qtrax users for unlimited streaming or downloading to a PC. Users can also load downloaded tracks on up to three portable devices and play them while their membership remains active.”*

The idea is to offer an online music player that goes beyond just primary content. Albums, photos, news and reviews are some of the additional content to be accessible to users. Concerts will also be made available the day after the live performance and a personal music library can be set by each user. Once deals have been signed with the two remaining, major record companies a complete music service will be available covering up to 25 million songs.¹⁵

Nokia: Comes with music

The mobile phone company Nokia announced in December last year that it will launch a specially designed mobile phone service, giving access to unlimited music content, in the second half of 2008. The access is made on a yearly basis with a monthly subscription fee. Content deals have already been signed with Universal Music Group and Sony BMG and is expected to be introduced in Europe, Asia and the US. Like many other companies Nokia is trying to develop a business involving music and that is driven by its strong brand image and consumer commitment¹⁶.

ISPs are also moving into music to offer value added services to their users. Neuf Cegetel, France’s second largest ISP, partnered with Universal to offer subscribers unlimited music downloads and Alice, another ISP in France providing triple play bundles, partnered with EMI. Joost, Orange and Bebo are other examples of companies that leveraging the music business.

Podcasting and multiple platform distribution

Today it is easy for people to access radio content through a wide set of channels. Unsurprisingly, a study, on consumer behaviour, interest in new technology and media trends, shows that the radio device remains the main channel that Europeans use to listen to radio broadcasts. However, channels like the Internet, TV and portable music players are growing in importance. Almost one third of the respondents claim to stream radio on the Internet in a typical week¹⁷. Furthermore, listening differs from one country to the other and while Sweden is rather advanced when it comes to online radio listening the Southern European countries spend more time listening to radio on their mobile phones. Overall, most mobile radio listeners seem to be men and podcasters more involved in social networking than average Internet users.

¹⁵ www.cnet.com, *Legal P2P music site Qtrax signs EMI Music*, June 3 2008

¹⁶ www.pcworld.com, *Nokia adds Sony BMG to ‘Comes with music’*, April 2008

¹⁷ *European Technographics online media, marketing and retail survey*, Forrester Research, Q3 2007

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Research investigating new online media trends and the impact of digital radio platforms impact on peoples' lives shows that:

- Traditional radio is still an important medium - 21 per cent of users rating AM/FM channels as an important audio platform/device. However, mobile phones are even more essential with a ten per cent lead on radio.
- Online radio is increasing in popularity - more than ten per cent of the people aged 12 or older claiming to have listened to radio on the Internet the past week. Users that listen to online radio tend to be more active online and more likely to engage in social networks.
- The penetration of portable devices have shown drastic growth, especially among younger people – iPods and mp3s have become a natural part of young peoples' media consumption and 73 per cent of the 12 to 17 year olds own such a device, compared with 37 per cent overall.
- The usage of audio podcasting is increasing - a direct result of the high penetration of portable media devices. Even if the podcasting level has not yet reached spectacular heights the data indicates a trend towards on-demand delivered content.
- The Internet is gaining on radio as the source to learn about new music. Radio is, according to half of the respondents, still the medium to which people turn to learn about music trends and new artists. However, the Internet is growing in importance, showing an increase from 9 to 25 per cent in five years. The great availability of music content is driving this perception and the importance of the Internet is probably even higher within the younger segment¹⁸.

As radio consumption moves to new platforms, and especially to the Internet, on-demand content is increasing in popularity. The portability of content has enabled new contexts and environments for listening to downloaded audio and people who access content through podcasting or catch-up streaming has grown significantly in past years¹⁹. The usage of portable devices is one of the key drivers of the on-demand market and has revolutionised the way people consume music. There is no longer a clear distinction between mobile phones and portable music players and Wi-Fi technology and functionalities allow for browsing and Internet usage on the go. As music listening is one of the top activities among teenagers this trend could be reapplied to youth radio²⁰.

¹⁸ Arbitron, *The Infinite Dial 2008: Radio's Digital Platforms*, April 2008

¹⁹ Arbitron, *The Infinite Dial 2008: Radio's Digital Platforms*, April 2008

²⁰ IFPI, *IFPI Digital Music Report 2008*, January 2008

Conclusions

The media environment has changed significantly the past five years and traditional media companies are transforming into multimedia organisations. The distinction between TV and radio is progressively fading and user consumption is moving towards more flexible distribution channels. The radio market has become more competitive and it is important for public broadcasters to adapt to the new trends to continue engaging younger audiences.

Tendencies with importance to youth radio

Public radio channels are losing listeners and the trend is particularly important among younger audiences. As Internet usage goes up the time spent listening to analogue radio goes down and the wide availability of free digital music offers easy access to a wide range of content. Social networking sites and online-based radio services become a growing source of music discovery and radio might be losing its position as a key source of new music. Online radio services enhance the listener's experience and give users access to a large number of radio stations. Local, regional and national stations become global and services like Last.fm are attracting millions of users, being built as social networking sites with focus on music.

The availability of digital music has created turbulence within the music industry; record companies are losing income and need to find ways of generating new revenue streams. The usage of portable devices in combination with illegal downloading, using P2P technology, and online music sales, through properties like iTunes, creates a new dimension to the availability of content. Major music labels are seeking new ways to drive revenue and are increasing their content distribution through social networks, direct-to-consumer sites and brand partnerships. Telcos, broadcasters, social networking sites, mobile companies and ISPs are all interested in building business proposals around music and trying to define a profitable business model and set up strategic partnerships to maximize content distribution. The most common business models seem to be ad-supported streams with payable downloads, often based on licensing agreements.

Partnerships building on cross-media relationships are more and more common across different sectors. The newspaper industry has seen its advertising revenues drop significantly and online sales have become its top priority. For radio, however, the situation is not as drastic, and new revenue models built around digital and online content is believed to be needed in the future²¹.

As radio consumption moves to new platforms, and especially to the Internet, on-demand content is increasing in popularity. The portability of content has enabled new contexts and environments for listening to downloaded audio and the amount of people who access content through podcasting or

²¹ IFPI, *IFPI Digital Music Report 2008*, January 2008

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catch-up streaming has grown a lot past years²². The usage of portable devices is one of the key drivers of the on-demand market and has revolutionised the way people consume music. There is no longer a clear distinction between mobile phones and portable music players. Furthermore, Wi-Fi technology and functionalities allow for browsing and Internet usage on the go. As music listening is one of the top activities among teenagers, this trend could be reapplied to youth radio²³.

PSB youth services

The EBU youth survey shows that Members are present with 43 youth channels in 20 markets:

- 26 analogue channels
- 3 digital channels
- 14 online channels.

Almost all analogue channels are simulcast online and some organisations have launched web based niche music channels to extend and diversify the online youth offer. Targeting strategies vary but most channels are still aimed at listeners up to 35 years. 71 per cent of all channels target listeners within the 14-35 age range. Music dominates the youth programming output for most channels and the majority of channels feature more than 70 per cent music. The most common formats are CHR, Pop/rock, Alternative and Urban.

The audience share results for Members' youth channels were overall stable in 2007 and somewhat positive compared to the previous year. However, commercial youth channels dominate many markets. The average audience share for Members' analogue channels is 6.7 per cent and most channels have lost shares over the past ten years due to increased competition.

The results show that interactive online services are vital to attract younger listeners, even though the analogue platform is dominating youth radio consumption. 90 per cent of the respondents claim analogue consumption to be high, but podcasting and streaming are important complementary sources. By distributing content through multiple channels broadcasters have a greater chance of reaching young people who spend a lot of time in front of the computer and use portable media devices.

Members are adapting to the changing media environment and the majority already offer podcasting and/or catch-up streaming radio services. Mobile services, online forums and other value added services, tailored towards young people, are also widely implemented. Alliances with external partners are also common and 44 per cent of the EBU youth channels have collaborated with relevant websites to extend the content distribution and strengthen the brand image. They take advantage of new media trends such as social networking, audio and video sharing, blogging etc. and use them to modernize the radio medium.

²² Arbitron, *The Infinite Dial 2008: Radio's Digital Platforms*, April 2008

²³ IFPI, *IFPI Digital Music Report 2008*, January 2008

Future opportunities and strategies

New technologies have increased the possibilities for youth radio to add new and more individualised services to get closer to the listener and more in-touch with them. A representative from one of the youth channels said that the threat and challenge was to move from a classical radio brand to become more of a multimedia brand with content available through multiple platforms. Other opportunities mentioned were to converge the medium by making radio part of a multiplatform strategy, creating audience attraction through quality content and building on the social networking trend and increasing the interaction with the audience, either through programmes or new, interactive services.

Case studies made on four public service youth channels show Members' views on strategies and future opportunities.

YOU FM

The spokesperson for the German youth channel YOU FM believes that analogue radio will remain one of the main sources of radio listening but that online consumption will grow. The channel needs to become more focused on multimedia and branding will be of key importance. Listeners should be able to see, feel and touch the brand and it needs to connect with the audience. The content needs to be available where the listeners are, on multiple platforms. The two key elements to attract youth audiences in the future are a) to make them feel involved and b) to give them the opportunity to express themselves. The channel tries to work more towards user participation and takes advantage of blogging services to incorporate listeners' demands and topics into the programming. Formats and initiatives need to be oriented towards young listeners' needs and lifestyles so they see radio as more than just music and recognize the added value of public radio quality programming.

Le Mouv'

*"We are in the beginning of media Darwinism, the evolution of old media.
Either we adapt and move forward or we go under."*

According to the Le Mouv' spokesperson, radio needs to become global. The medium will remain an important source of information, but it will probably lose both shares and listeners. A global cross-media market will take over, mixing all forms of media: video, audio, news etc. The role of Le Mouv' would become based around trust. To be a trademark for quality content and a trusted source, a community or platform for young people. The future might be to provide content with which users can create their own radio channels, based on podcasts from various sources. A computer based programme will, help organise content in an individualized way, based on the users' preferences. Radio as it is today might not be a good medium to reach young people.

Radio 1

The digital age and the Internet have brought thousands of radio stations from around the world into people's homes. The Radio 1 spokesperson says that the choice is greater than ever and that public radio channels need to profile and differentiate themselves to reach out to the audience. The media choice for young audiences is increasing through online portals, social networking sites, YouTube, gaming etc. and the audience increasingly expects on-demand services. The key is to ensure programmes and content are available on-demand and in the formats in which the audience wishes to consume them. Branding is also vital. If more online content is consumed through sites like YouTube and Last.fm it will become increasingly important for those creating it to be recognised. The spokesperson further believes that niche services like 1Xtra have a chance to grow, by providing a highly targeted service to a particular audience. By exploiting mobile technology, radio can gain a closer connection with its audience. New media, while a threat, is also an opportunity.

P3

The P3 spokesperson sees the changing media landscape with increasing digital downloading and competition from international players as one of the main threats for the future. P3 believes that the consumption of audio content will continue to change and that more consumption will go through new services offered online. However, the demand for scheduled programming will continue to exist. Not everyone wants to actively search for content; some prefer to be served with traditionally scheduled programming. It is very important that the programmes offered are of high quality and available on multiple platforms in different formats and continue to be in the frontline when it comes to developing new and innovative formats. Listeners should see the public service channel as creative and innovative, a brand with focus on development and in line with the broader media landscape.

Future outlook

The current media landscape offers numerous possibilities and by using new technologies public youth channels can create a stronger bond to their audience. Conclusions drawn from Members views on youth radio show that even though strategies vary, five key themes seem to be of great importance for the future:

- **Re-distribution**
- **Availability**
- **Diversity**
- **In-touch**
- **On-demand**



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