



GIBRALTAR REGULATORY
AUTHORITY

RADIO AUDIENCE SURVEY

Report - BC 03/17

October 2017

FOREWARD

This Report is based on results collated from the Radio Audience Survey which was carried out by the Broadcasting Division in the first quarter of 2017.

The purpose of the survey was to better assess and understand the radio listening habits of the local population. A series of charts are presented throughout the Report together with practical information to validate the results.

For more information regarding the Radio Audience Survey please contact the Broadcasting Division directly.

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EXECUTIVE SUMMARY

The Gibraltar Regulatory Authority (the "GRA") conducted this survey to identify the radio listening habits in Gibraltar. Throughout Europe, radio audiences are on the decline, especially amongst teenagers, and the aim of this survey was to gauge whether Gibraltar was following the same trend.

The survey was conducted primarily by face-to-face interviews, at multiple locations and a good representative sample of the adult population participated. However, as one of our aims was to identify the habits of teenagers, the Broadcasting Division sought the assistance of both comprehensive schools and a specific set of survey forms were completed by students. At the final count, 733 valid survey forms were collated within the targeted age demographic ranging from 13 to 60+ years.

Based on this survey and results from other European countries, it is clear that radio in general is competing with newer media platforms and services and the younger generations are the ones less likely to listen to the radio. Music is still the main reason for listening to the radio for lengthy periods. Good presenters were recognised and 20% of those surveyed stated that the presenter was one of the reasons for listening to the radio.

News bulletins were identified as the second most popular reason for listening to the radio. This is also increasingly competing with the internet and social media for general news and current affairs. Locally, alternative reasons for listening to the radio are that it provides companionship and is considered a good source of background entertainment that is difficult to match by other mediums. The radio also remains an essential source of information during cases of emergency or power-cuts, when all other mediums become inaccessible.

Radio still provides a vital service to the public and has important qualities. The main advantage of radio is that it is a cheap and reliable source of information available to the whole of Gibraltar. According to the European Commission Eurobarometer report of November 2016¹ on "Media Use in the EU", the most trusted source of information was the radio with 59% of Europeans expressing this view, trusted above television (50%) and newspapers (46%).

¹ <http://ec.europa.eu/commfrontoffice/publicopinion/index.cfm/ResultDoc/download/DocumentKy/79405>

METHODOLOGY

A random sampling approach was adopted to conduct the survey as there was limited local information which we could use and compare and this was the first general radio survey carried out by the GRA. The majority of the results were obtained through interviews conducted face-to-face. However, to extend the reach to a greater audience, an on-line form was used and promoted on social media.

Identifying youth listening trends was one of our objectives and with the assistance of both comprehensive schools we are of the view that we have achieved accurate results that provide a clear indication of their preferences.

Based on the local population level, extrapolated from the latest Census 2012, and with a confidence level of 95%, the final sample base produces a confidence interval of 3.6 and we are satisfied that our results provide a true reflection of the population's listening habits.

LISTENING HABITS

Radio listeners come in all variations, and so do their listening preferences. It is common knowledge that listeners tune in at different times during the day and it is also known that they tune in for different reasons. Radio broadcasters rely on their own radio audience survey results to determine radio programming which in turn, involves determining how to cater to the broader audiences whilst still focusing on their core listeners.

The primary objective of this survey was to identify the listening habits of our local audience and assess what preferences participants have with regards to the time spent listening to the radio. The results are illustrated by the use of charts and graphs and are explained in each section.

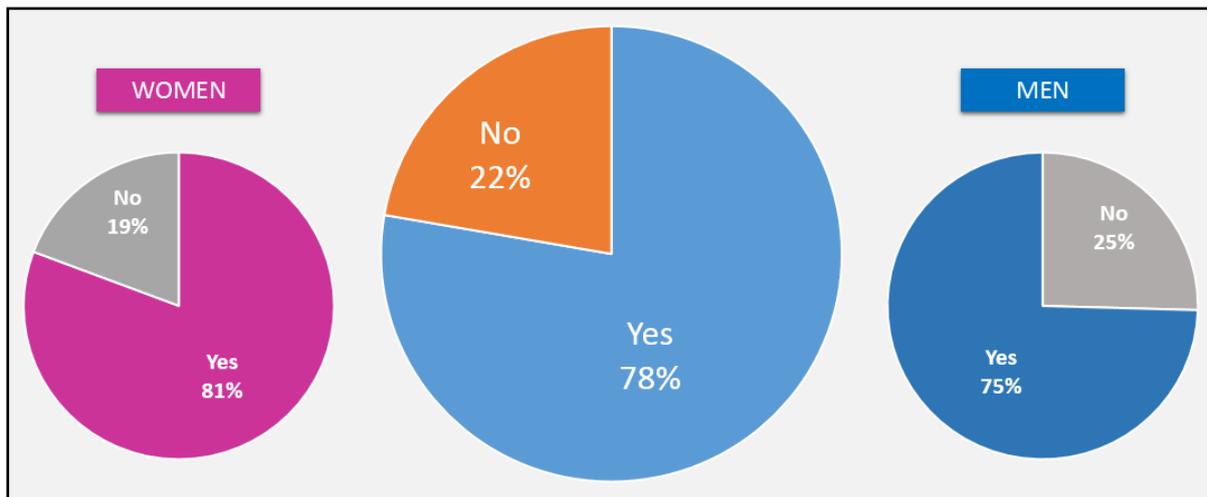


Figure 1. Do you listen to the radio?

The first question asked participants whether they listened to the radio. Results in Figure 1 show that 78% of the population² listen to a radio service. When broken down into gender stereotypes, it becomes clear that women are the more avid listeners, with 81% confirming that they listen to the radio in comparison to 75% of men.

The time spent listening to the radio is also very important and this has generally been on the decline throughout Europe³. Local results shown in Figure 2, indicate that the majority of the

² Population in this report means local residents 13+ years of age

³ As documented by EBU MIS - Audience Trends: Radio 2016 (<https://www.ebu.ch/publications/audience-trends-radio-2016-1>)

population listen for an average of 2-5 hours per week. The least favourite time-duration group however is 10-15 hours per week.

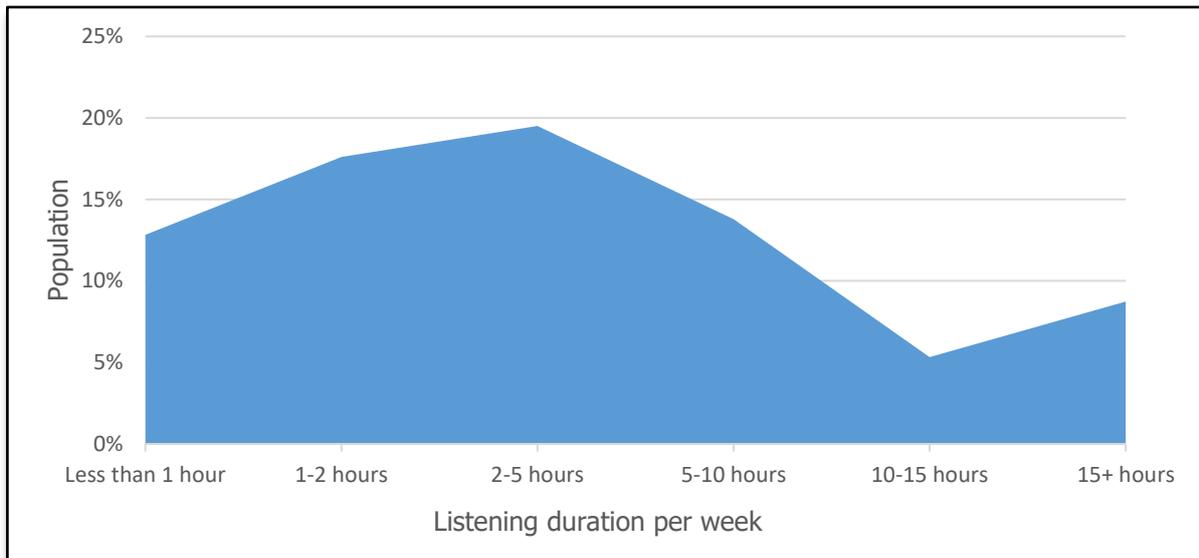


Figure 2. Average radio listening duration per week

When splitting the results from the chart above into genders, it becomes evident that the peak in Figure 2 above is highly populated by women. The peak in Figure 3 below shows that 60% of the respondents specifically within the 2-5 hours' time-duration group, were women and this accounts for 12% of the population.

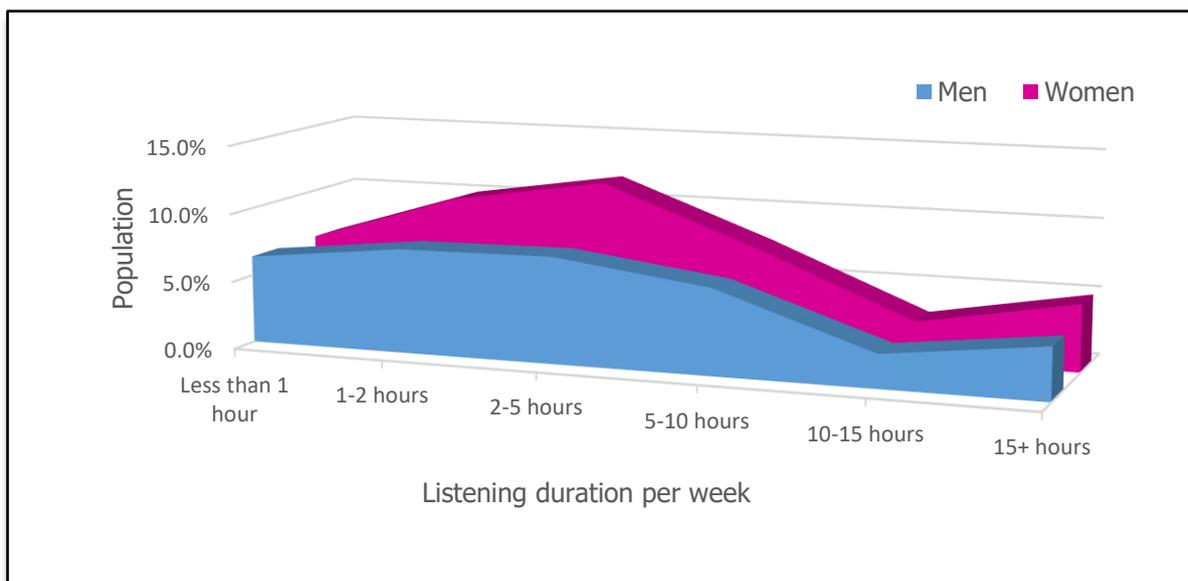


Figure 3. Gender comparison for radio listening duration per week

If we further analyse the average radio listening duration scales and divide results into age demographics instead, it shows that the younger generations are less likely to listen to the radio. Seemingly, whilst radio listening habits are generally ever-changing and the older generations remain faithful to radio listening, the younger age groups may well be relying on other media platforms to source music, news, etc.

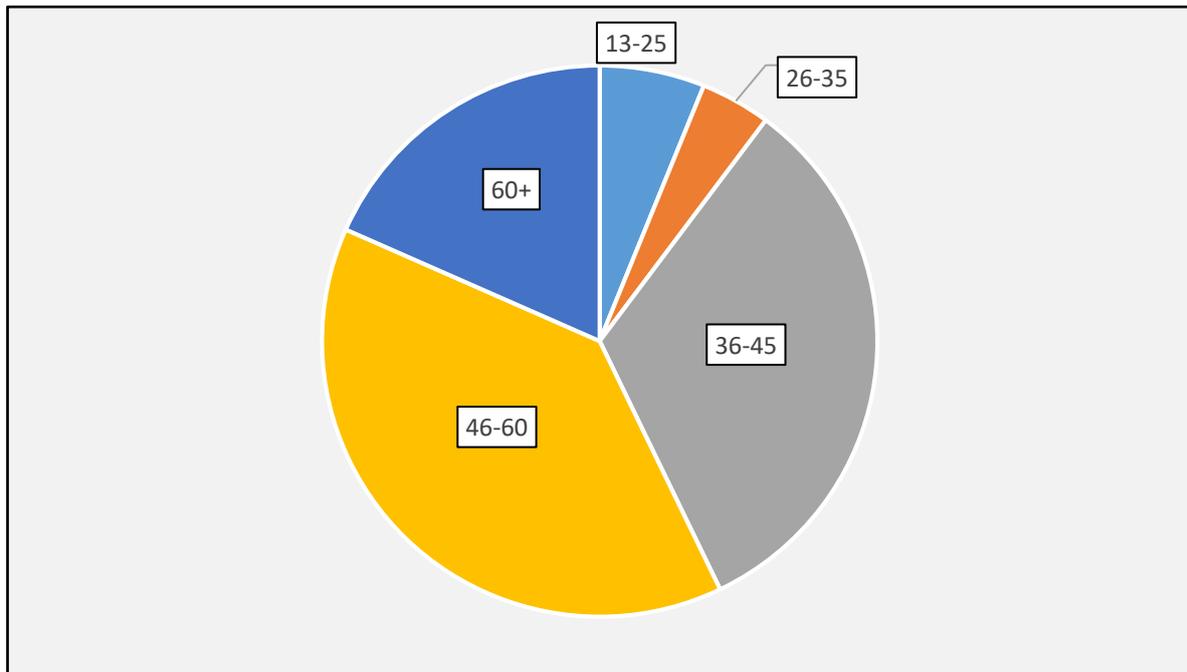


Figure 4. Age groups for those listening to 15+ hours per week

Figure 4 above highlights that the majority of those who listen to the radio for 15+hours per week are between the ages of 36 and 60 years. Interestingly, within this age group, 55% were men which undermines the results shown in Figure 1 which identified women as being the more avid radio listeners. However, the trend concerning radio listening habits amongst the younger generations is evident in the above pie chart with 13 to 35 year olds only accounting for 10% of the results.

Figure 5 below examines age groups that listen to radio for less than 1 hour per week. Results here follow the European trend again with regard the younger generations (13-25 year olds) spending less time listening to the radio.

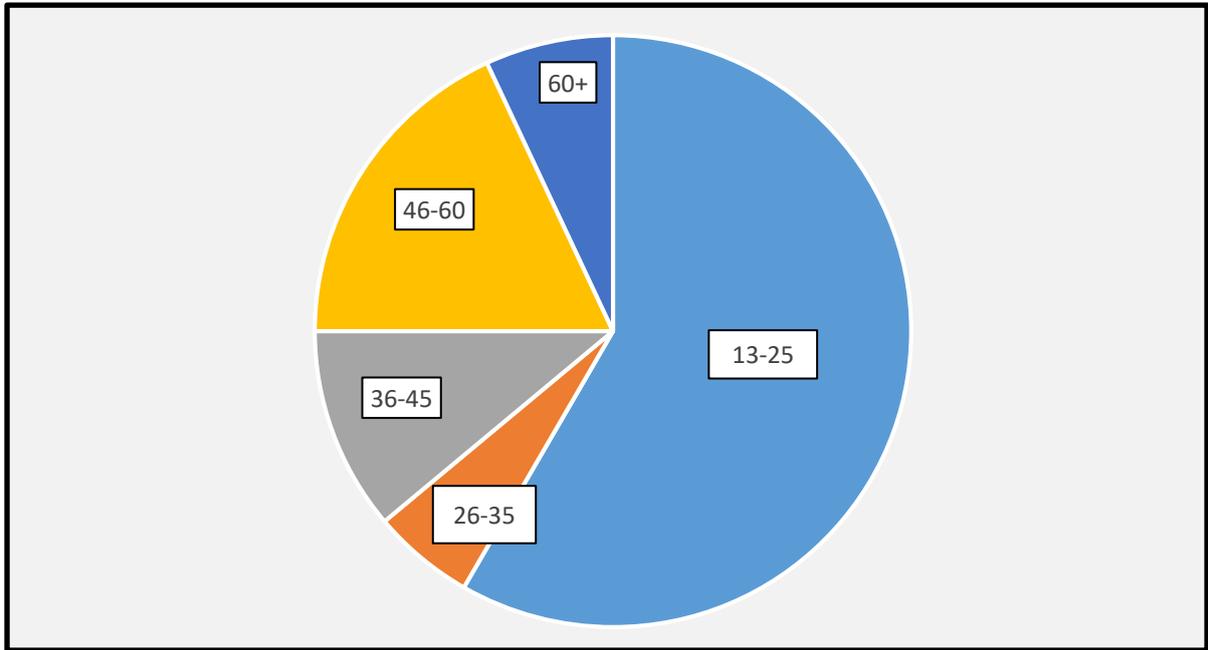


Figure 5. Age groups that listen to the radio for less than 1 hour

When further analysing the 13-25 years age group we identified that 64% of those that listen to radio for less than 1 hour were males. It seems listening to the radio for shorter amounts of time is more popular amongst the male audience with females only accounting for 36% of the results in this specific age group.

The gender and age demographic of respondents who said that they do not listen to the radio at all, were also analysed and the results are plotted in Figure 6 below.

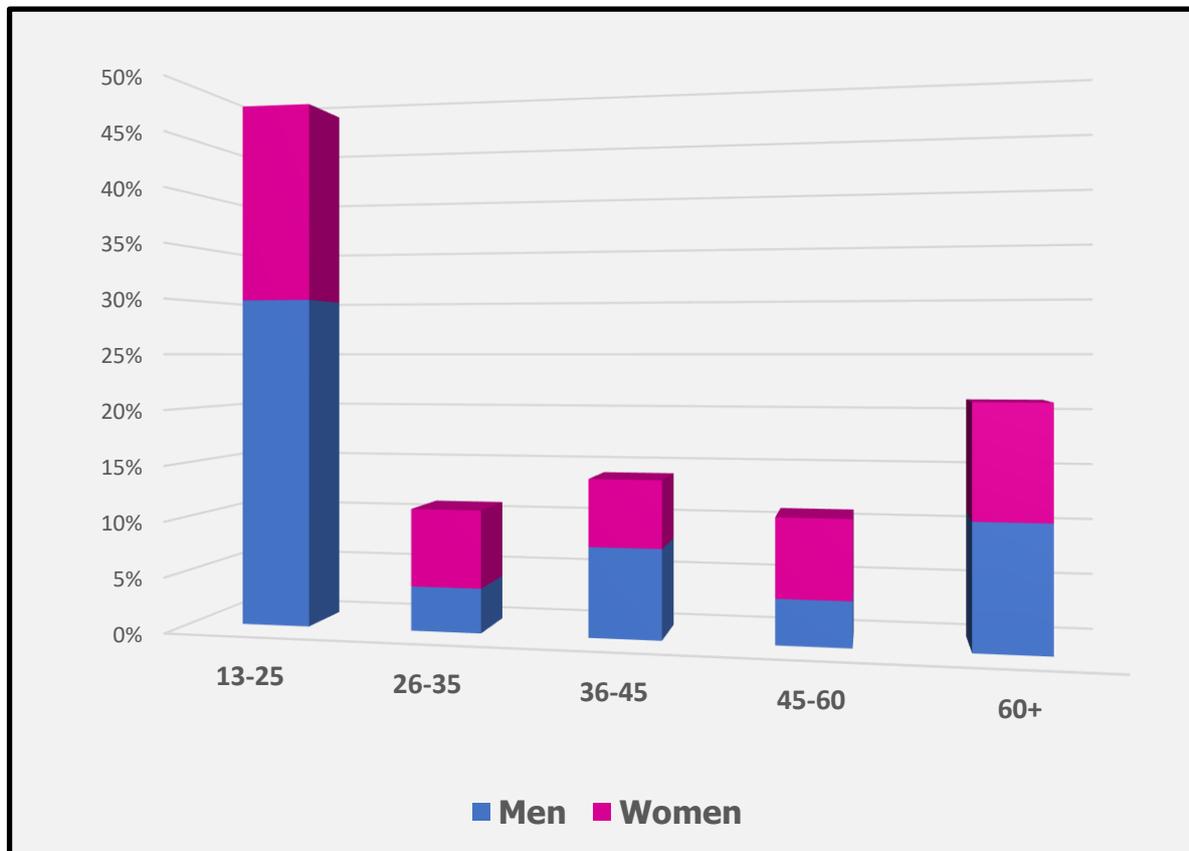


Figure 6. Gender comparison for those who do not listen to radio

The gender balance fluctuates slightly between age groups but it is clear that almost 50% of 13 to 25 year olds are not listening to the radio, with males accounting for a slightly higher percentage of this result. It should also be noted that at the other end of the scale, 20% of those surveyed within the 60+ age group said they did not listen to the radio. The gender split for this age group is almost equal.

LOCATIONS

Our survey asked participants where they were most likely to listen to the radio. Participants were asked to choose between several options, with a majority selecting more than one of the options provided. Figure 7 below illustrates the different options chosen by participants and the percentage results.

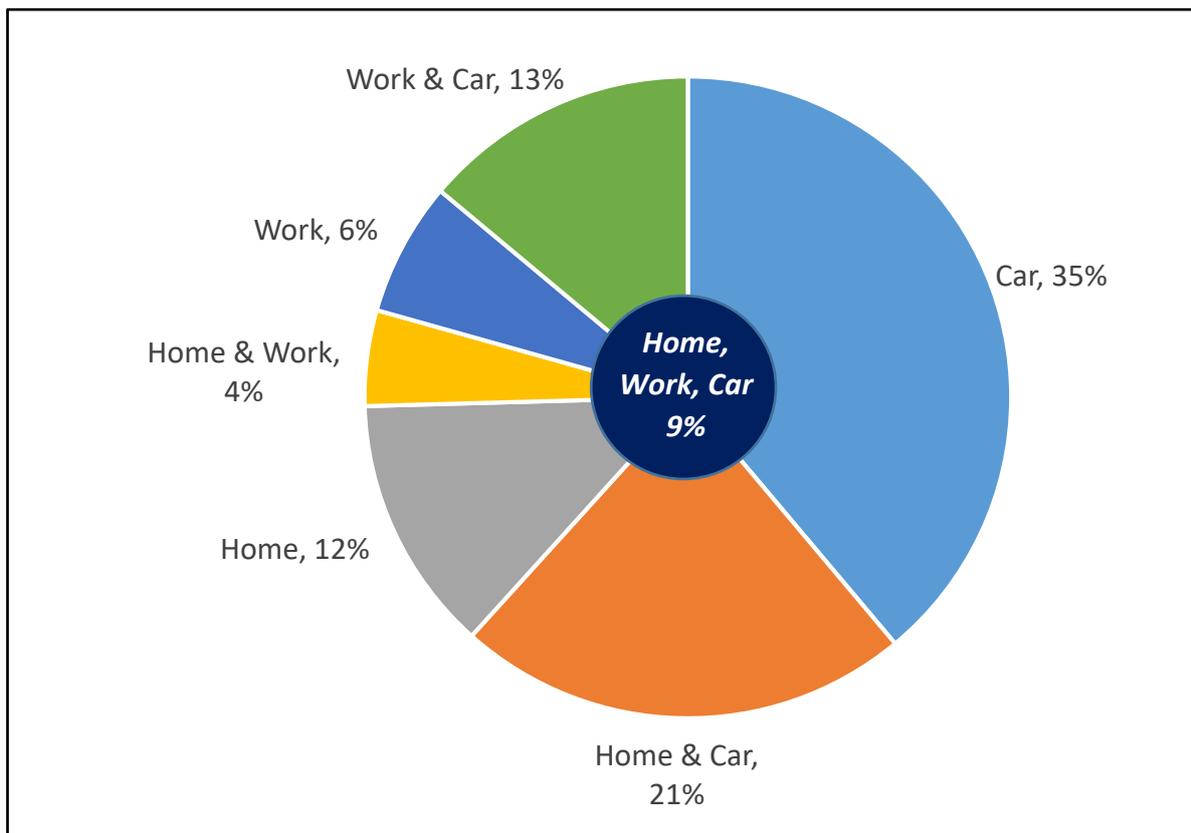


Figure 7. Where do you listen to the radio?

Figure 7 clearly demonstrates that the most popular place to listen to the radio is the car, with a total of 78% of the population choosing the car as their preferred option. This 78% is the collective result of those who chose "car" combined with the other options of "home" and "work", however, a firm 35% of those surveyed stated that they only listen to the radio in their cars. Interestingly, unlike other larger European countries, the local population driving to work does not have a long commuting distance to cover. However, having "car" as the preferred option echoes the European trend for the most popular setting for radio listening.

REASONS FOR LISTENING

People listen to radio to be informed, entertained and educated. It serves as a means of mass communication which readily provides its audience with day-to-day information and encourages listeners to participate in competitions, catch-up with the latest trends or follow their favourite chart hits.

We presented our target audience with a question about their reasons for listening to the radio. A total of six "reasons" were provided for them, as shown in Figure 8 below, with the last option allowing participants to come up with their own personal motives for listening to the radio.

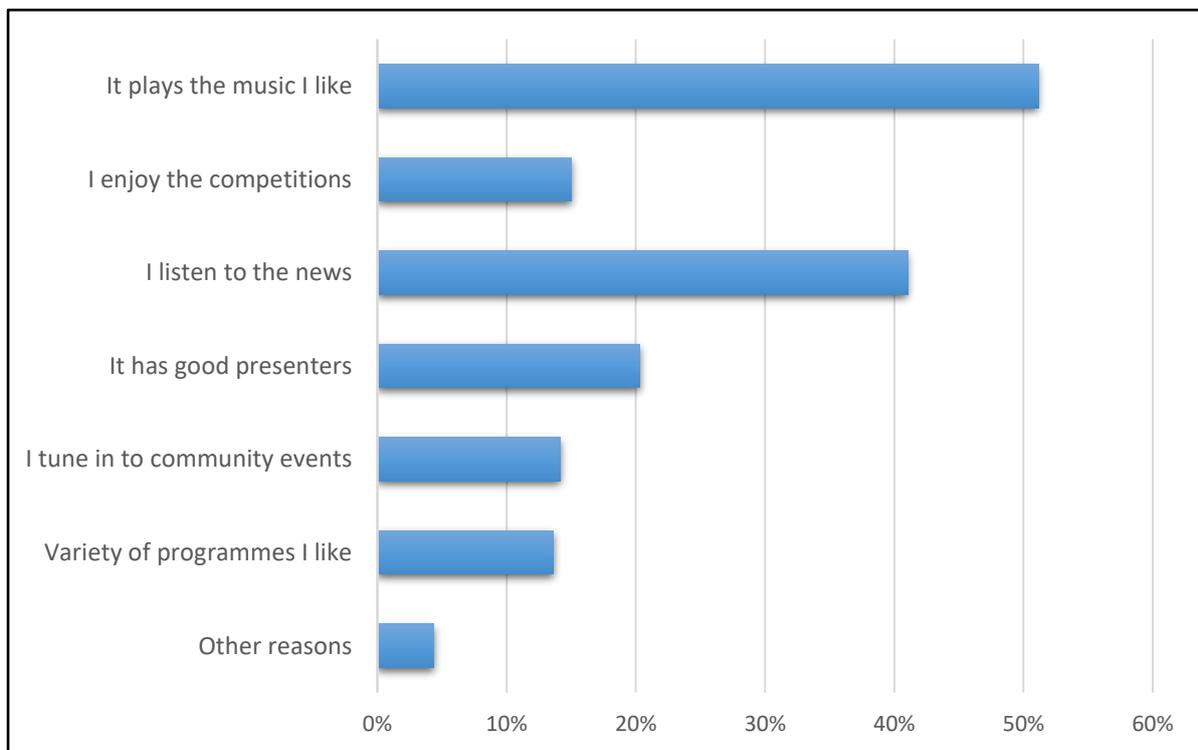


Figure 8. Why do you listen to your preferred station?

Over half of those surveyed highlighted that they listened to the radio because of the music content it provided. Radio is commonly perceived to help broaden knowledge and this is supported by the results in Figure 8 in which tuning in to listen to the news is the second most popular option. Radio provides an integral role in bringing local and international news to the listener's doorstep and many still rely on this reliable service for such information.

Radio has the ability to interact with listeners when messages are sent, through phone calls, emails or social media (Twitter, Facebook, etc.) and a good radio personality is imperative to draw in and actively involve the audience.

It is interesting to note that the third most popular reason for listening to the radio (Figure 8) is having good presenters to broadcast the service, with participants stating that they enjoy the competitions following closely behind.

Figure 9 below splits the reasons for listening to the radio by gender and on most fronts, women account for higher percentages of each option. Whilst the music and news content is a firm favourite amongst both men and women, news is the top choice for men with 21% of the results whereas music is the favoured option for women with a weighty 32% of the results.

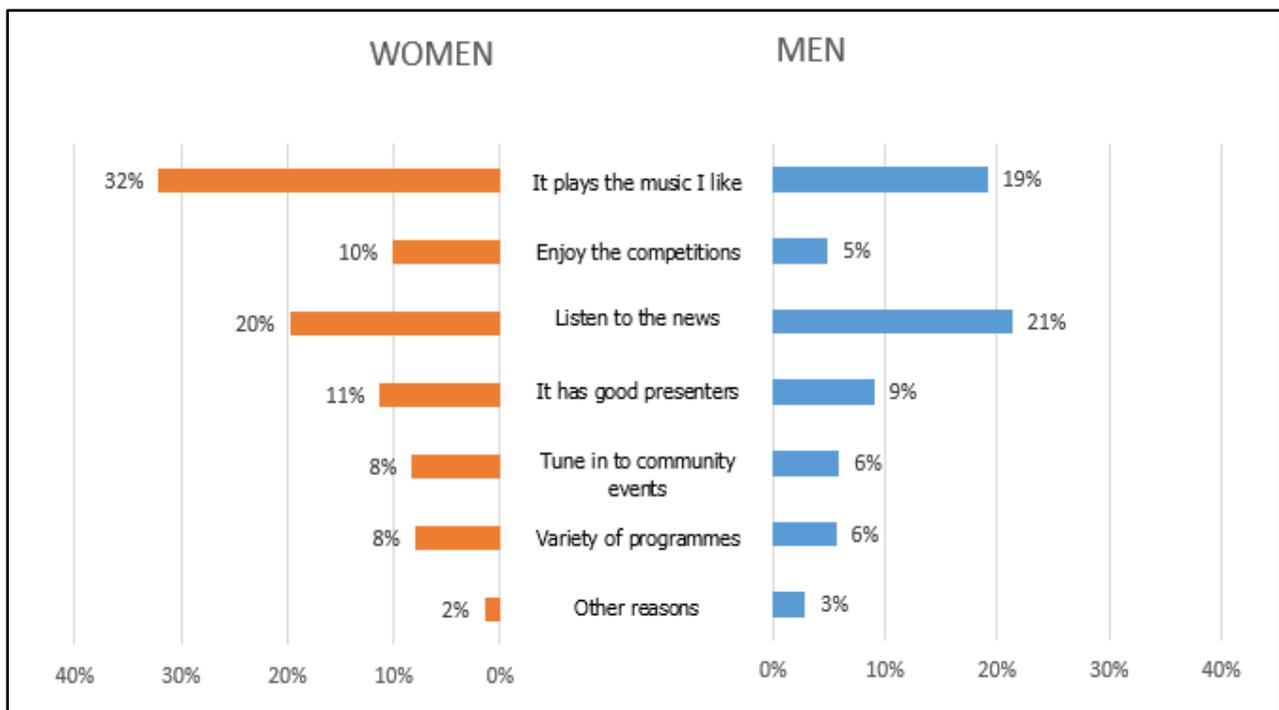


Figure 9. Gender comparison on reasons for listening to the radio

Interestingly, competition time, which may perhaps be the most interactive part of the service, is mostly enjoyed by women.

Below is a chart summarising the four main “other” reasons specified by those surveyed. It appears that radio listeners, especially those forming part of the older age groups and particularly those who live alone, discussed the element of companionship. Whilst they may not actively listen or partake in what is being talked about on the radio, many use it to fill the silence in their homes and make them feel “less alone”.

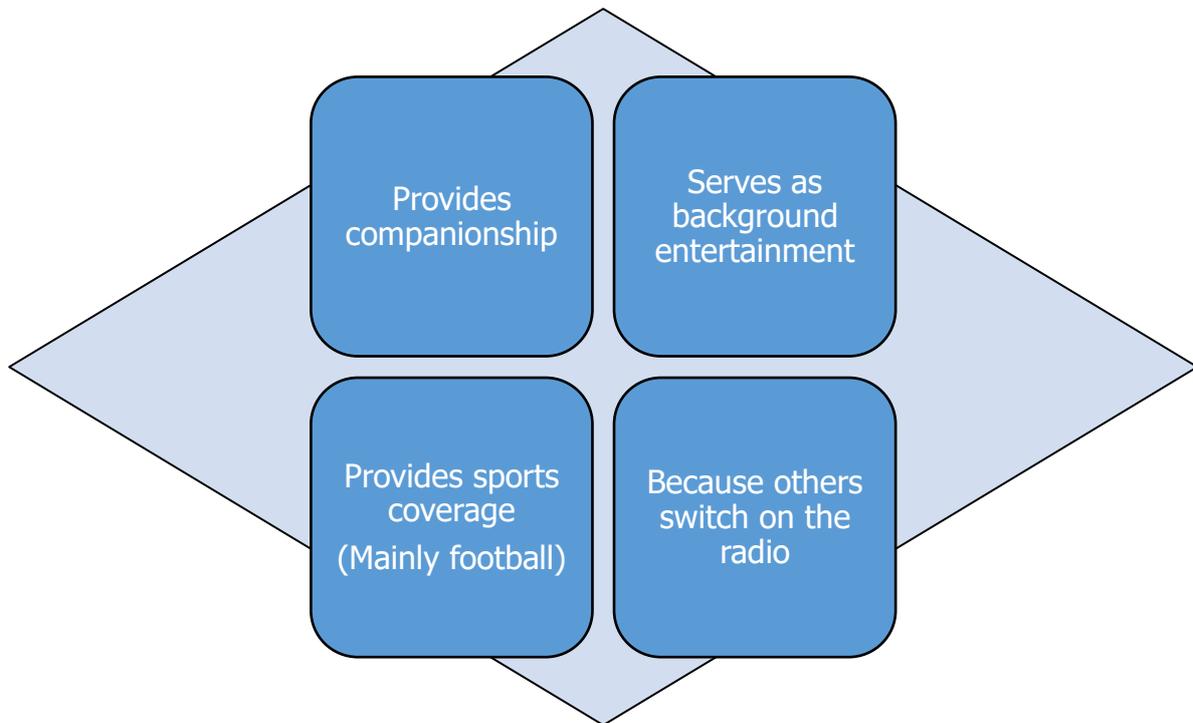


Figure 10. "Other reasons" for radio listenership

Some participants confirmed that on most occasions, the radio is just a form of background entertainment played in the office by another colleague. Radio allows listeners to consciously or sub-consciously select content of interest, unlike other mass communication media such as newspapers for example, where readers keenly decide what to read about. Therefore, not all radio listeners are actively paying attention to everything that is being discussed on-air and many use this broadcasting service as background entertainment. Ninety percent of listeners are actually doing something else while listening to radio⁴. Typically this will be routine tasks for example, driving, chores, housework.

Using the radio as a means of sourcing sports bulletins and updates, particularly in football, was a popular “other reason” amongst the men and most depended on international radio stations for such services.

⁴ As documented by Radio Advertising Bureau, 2013 (<http://www.rab.com>)

DEVICES

Radio services can be accessed on a range of platforms and devices, and consumers therefore have a wide range of options for receiving both analogue and digital radio transmissions. Not everyone nowadays listens to the radio in the traditional way, using an FM radio-set and many rely on the free on-line radio services available.

Participants were asked which of the devices from the following options they preferred to use to source their favourite radio service: DAB+ radio-set, TV, Mobile, Internet, and FM radio-set. Even though some participants selected more than one of the options above, it is evident from the percentage totals in Figure 11 that FM radio is by far the most popular form of reception in Gibraltar with 92% of respondents using an analogue receiver regularly.

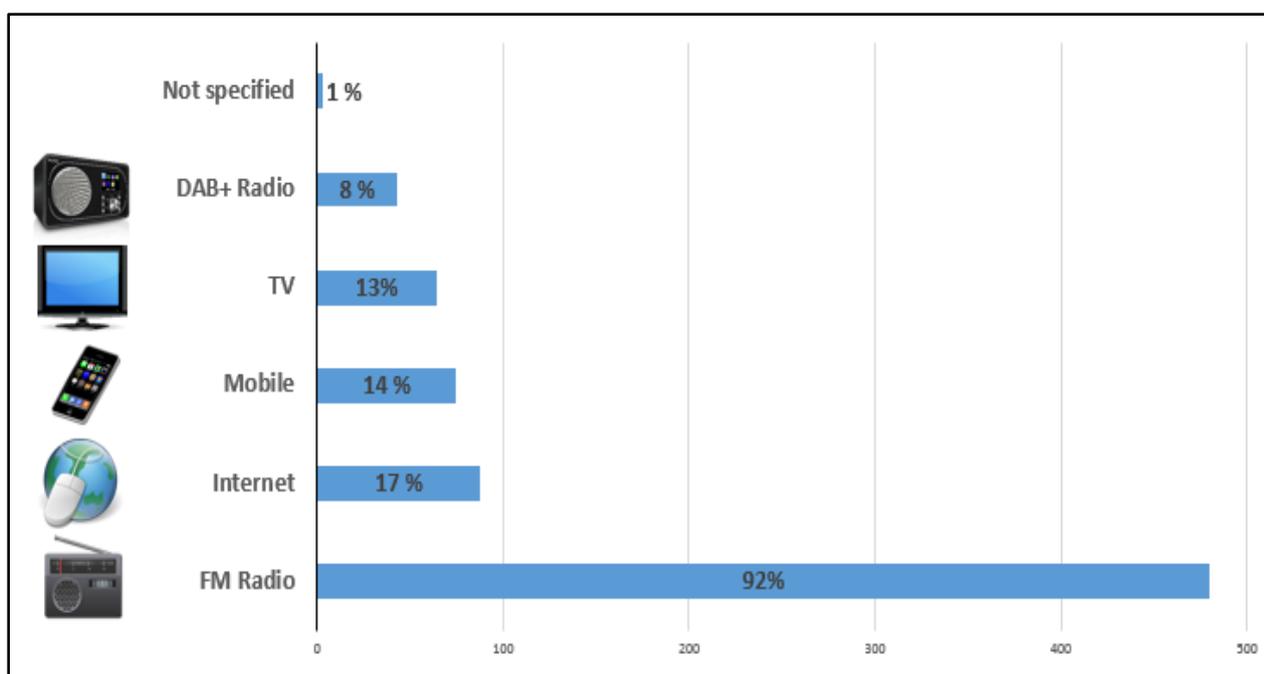


Figure 11. Devices used to listen to the radio

Whilst in Europe there exists a declining tendency for the general public to tune into radio services, radio listening via an FM radio set is characteristic to our local community, contrary to what most would think, in this day and age, considering the fast-developing medium that is the internet. Only 17% of the public said they used the internet to listen to a radio station and this category encompasses an array of devices such as laptops, desktop computers and radios incorporating Wi-Fi connectivity. In third place, with 14%, are the mobile devices such as tablets and smartphones where the public can tune into a radio service by way of a

downloaded App or streaming service. In most instances, internet connectivity will be required to support this service via mobile devices.

The switch over to digital television in 2012 across Europe created a new medium for regional radio. National radio stations were previously available via satellite TV, but since the 2012 switchover, a wider range of radio stations became available in the rest of Europe via the new digital TV set. Locally our survey results show that 13% of the public use their TV to listen to the radio.

RADIO & THE YOUNGER GENERATION (AGED 13 TO 18 YEARS)

Millennials have turned their ears and their attention to streaming, with many of those surveyed opting for on-demand entertainment. This shows that the idea of radio simply isn't as appealing to younger music lovers as it used to be for their older siblings, parents, and grandparents.

The results illustrated in Figure 6 show that 48% of 13-25 year olds do not listen to the radio. This falls in line with the current European trend that radio listening is not a popular service amongst the younger generations. To better understand the listening habits of our local youth we requested the assistance of both secondary schools in Gibraltar.

A total of 52% of the students surveyed, aged 13-18 years, disclosed that they do not listen to the radio and many of the 48% that do listen to the radio highlighting that they only listen to the radio because their parents or a family member had turned it on.

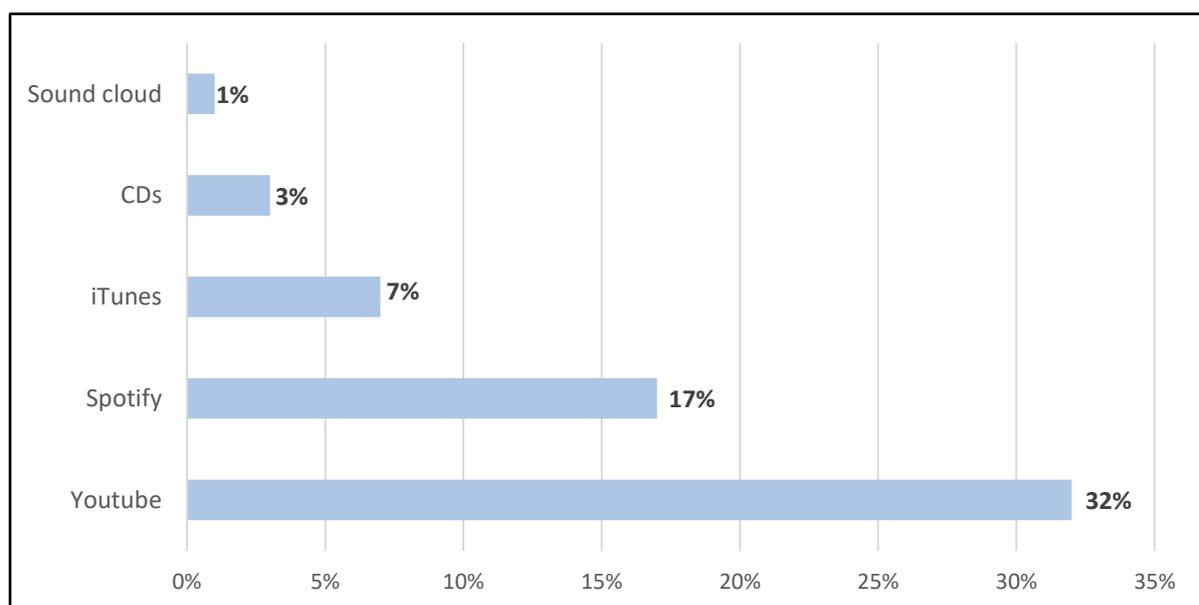


Figure 12. Alternative sources of music used by teenagers

Considering the majority of those surveyed, across all age groups identified that the most popular reason for listening to the radio was music, we asked students what alternative sources they used to access music, and the information is summarised in Figure 12.

Whilst there are hundreds of radio stations that stream their services via the internet, teenagers use YouTube as their preferred alternative source to music by creating personalised playlists and storing their favourite hits in one place.

LOCAL RADIO

There are currently two long-standing radio broadcasters in Gibraltar. Radio Gibraltar is provided by the Gibraltar Broadcasting Corporation (“GBC”) and has been providing a regular service since 1958. Radio Gibraltar currently provides analogue radio services on MW and FM, and has, since December 2012, provided digital audio broadcasts on the DAB+ platform as well.

The second radio network licensed in Gibraltar is the British Forces Broadcasting Service, commonly known as BFBS Gibraltar (“BFBS”). BFBS has been broadcasting locally since 1961 and currently broadcasts two analogue FM services.

In order to better understand radio listening preferences, we asked participants which of the local radio channels they enjoyed listening to. The results are summarised in Figure 13 below.

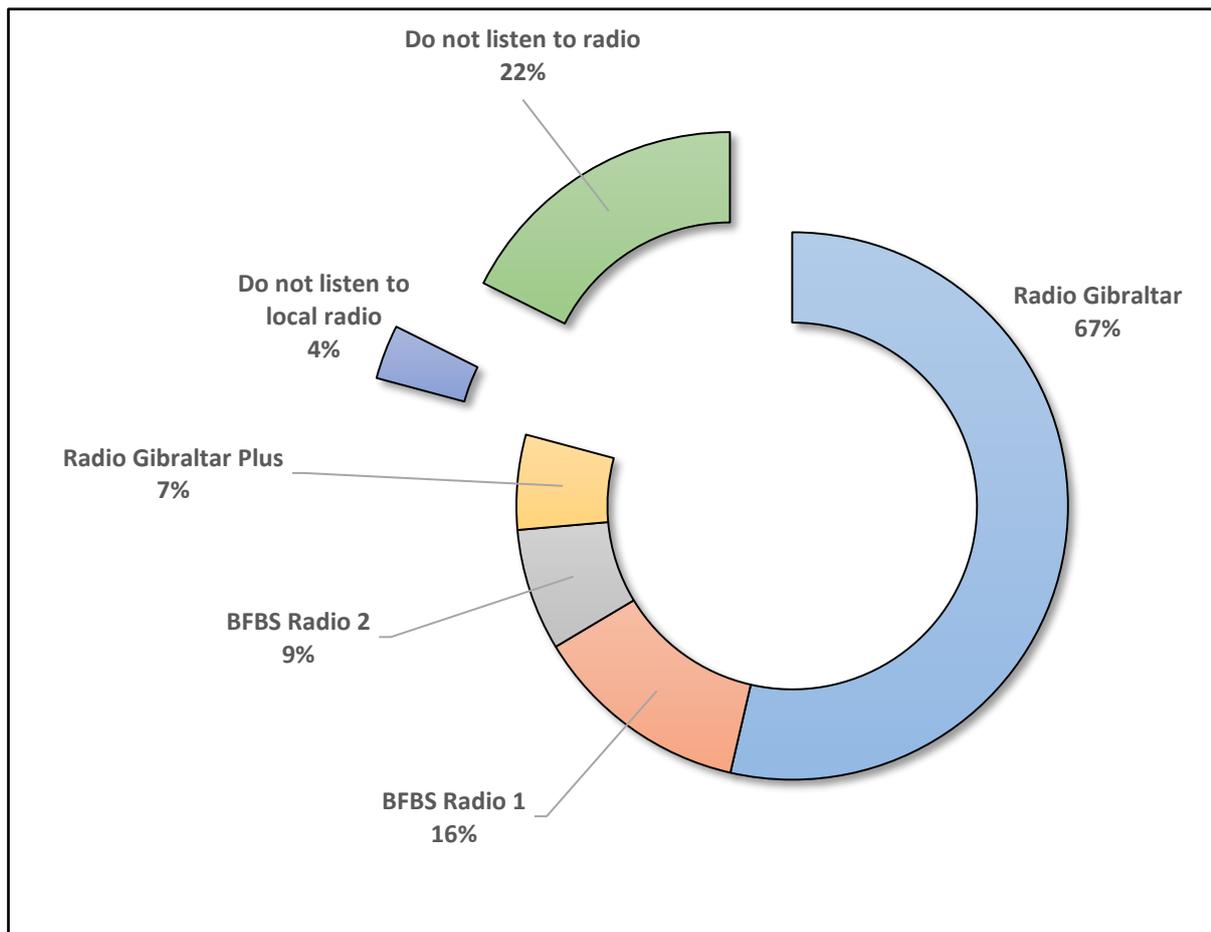


Figure 13. Preferred local radio stations

The results show that Radio Gibraltar is the most popular local service with 67% choosing this channel. In fact, whilst BFBS Radio mainly provides a service for the British forces based in Gibraltar, it is important to note that it is also a station which is listened to regularly by the general public with 16% of the population opting for the "BFBS Radio 1" service.

Interestingly, 4% of those surveyed said that they listened to the radio regularly but that their preferred radio service was not from a local station. It is fair to say however that a large section of our community rely on local radio services and that a vast majority use their FM radio sets to receive these transmissions.

Figure 14 below highlights the preferred local station by number of respondents.

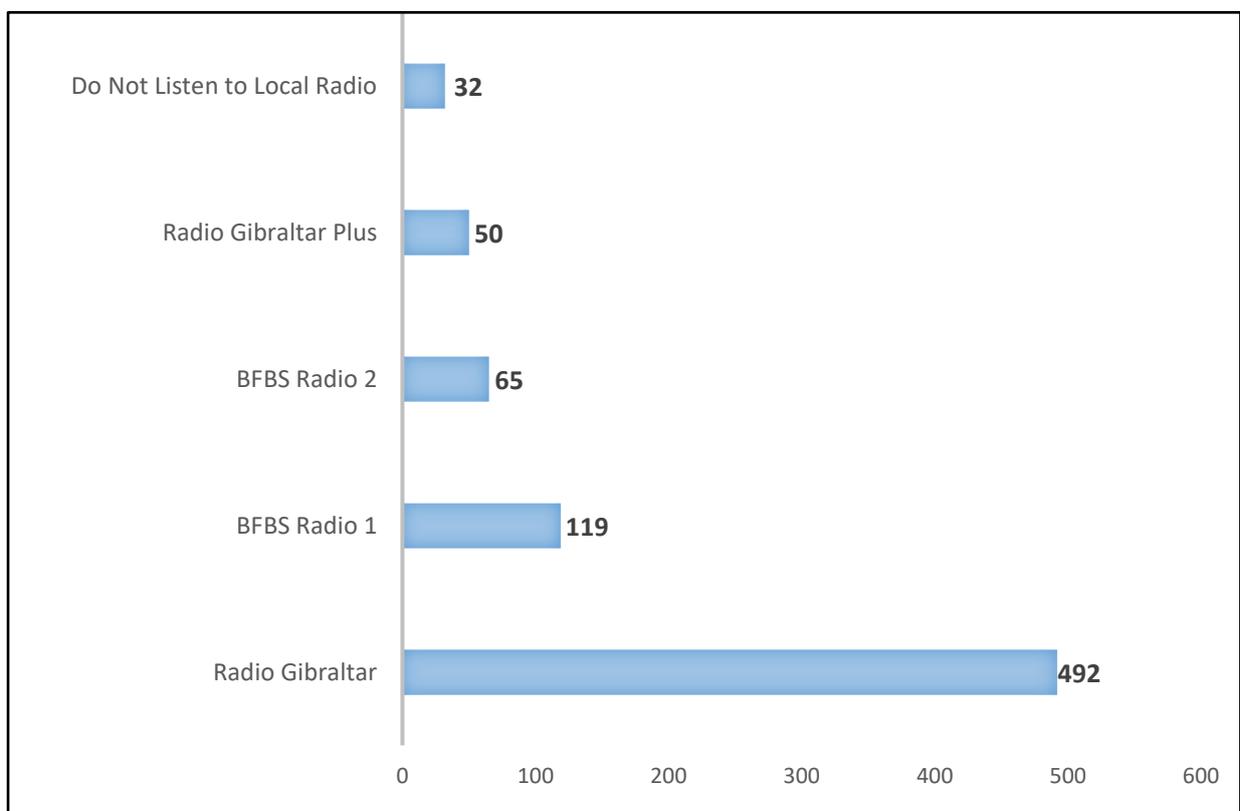


Figure 14. Preferred local radio stations by number of respondents

It should be noted that most of the respondents selected multiple channels and this shows how the public can quickly change channels to listen to their preferred programmes.

INTERNATIONAL RADIO

FM RADIO

According to the Radiomap.eu website, in addition to the local stations, there are 51 Spanish and 23 Moroccan radio channels that can be received from Gibraltar. With this variety of channels, languages and content it was important to identify the international listening habits of the general public. The survey allowed respondents to state their preferred international radio station and 14 distinct stations were identified. These are listed below:

Beach Grooves	Cadena Ser	Onda Zero Radio
BBC (via BFBS)	Canal Fiesta Radio	Radio Bahia
Cadena Cope	Europa FM	RNE 1
Cadena Dial	Kiss FM	
Cadena Radio Vida	Los 40 Principales	

Whilst a variety of international FM radio stations were listed by those surveyed, it soon became evident when we compiled the results that there were two especially popular stations, namely Kiss FM and Los 40 Principales. Figure 16 below depicts the top five international FM radio stations chosen by participants.

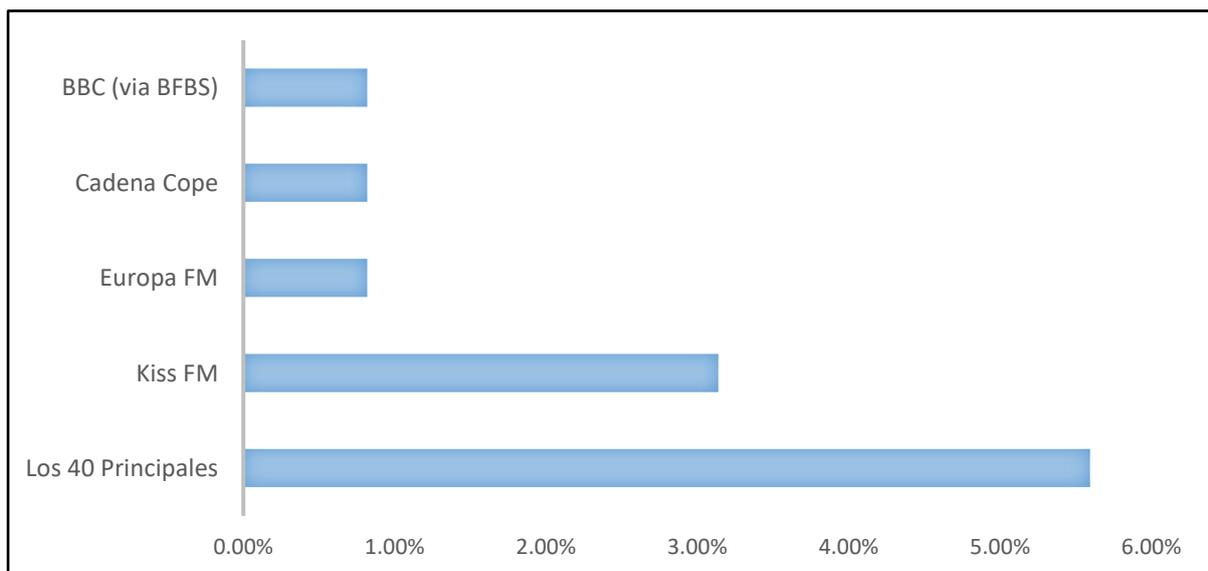


Figure 15. Preferred international FM radio stations

After having researched the top 5 international FM stations in Figure 15, it became apparent that these stations, particularly the top 3 preferences, were music channels that focused on the latest chart hits, pop lifestyle and celebrity news. This corroborates our findings from Figure 8 regarding why people tune into the radio and the main reason for this being music.

INTERNET RADIO

Internet radio is an audio service transmitted via the Internet. It may be accessed via desktops and laptops using an online radio service or streaming provider. Figure 11 illustrates how 17% of the public stated that they used the internet to listen to their preferred radio station and the chart below lists the different internet radio stations identified by those surveyed:

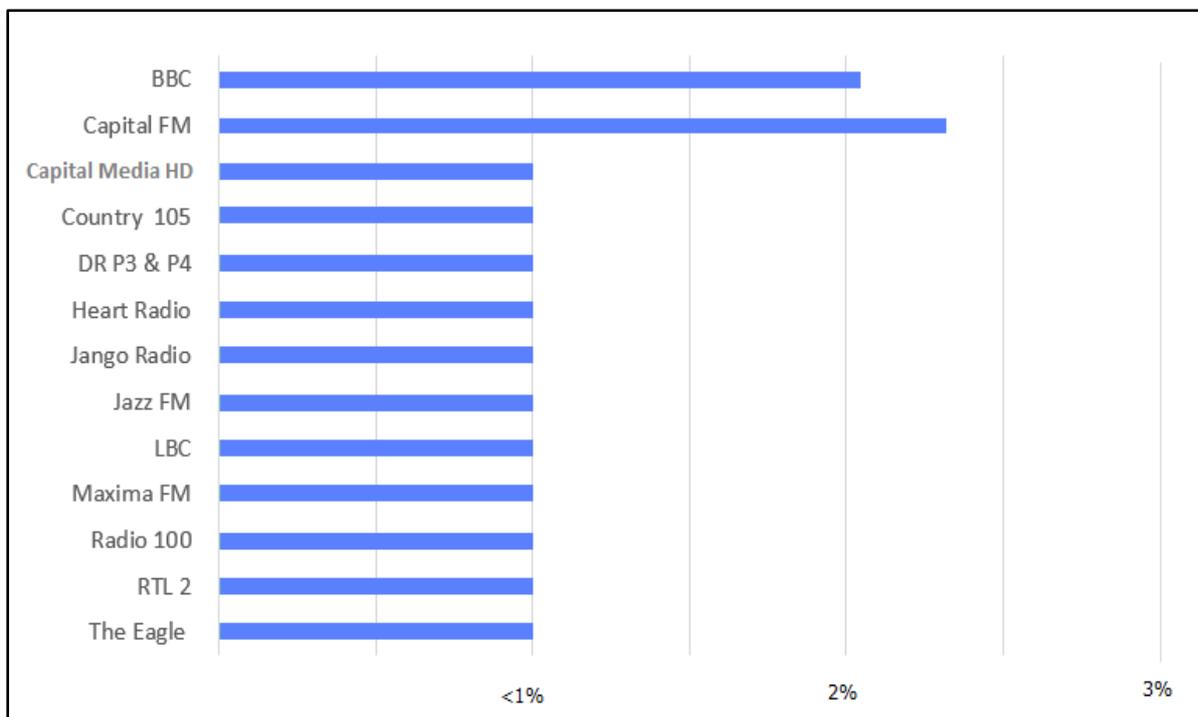


Figure 16. Preferred Internet radio stations

It is important to note that not all participants who disclosed that they listen to internet radio specified the name, or details of the internet radio station they regularly listen to. Nonetheless, a total of 13 internet radio stations were identified with two internet radio stations standing

out from the rest. Just over 2% of the population chose at least one of the "BBC"⁵ radio stations as their preferred option with 2.3% of the population opting for "Capital FM".

Internet radio however, is also accessed via smartphones and tablets provided they have a reliable Wi-Fi connection or 3G/4G service to be able to receive the streamed radio service. Figure 11 shows that 14% of the public use their mobile devices to listen to the radio and this may be facilitated by a specific mobile radio app which can be downloaded or via a search engine to locate your preferred station.

To conclude, a total of 27% used either mobile devices or the World Wide Web (via desktops/laptops) to access their preferred radio station. This figure is still considerably less than the 92% (as shown in Figure 11) who favoured listening to the radio using an FM radio set.

⁵ Respondents stated that they listened to several of the BBC channels so these were grouped together and are represented as "BBC" in Figure 16.

DIGITAL RADIO IN GIBRALTAR & EUROPE

Digital Audio Broadcasting (DAB) is a digital radio technology for broadcasting radio stations, used across Europe. DAB is more robust with regard to noise and multipath fading for mobile listening, since DAB reception quality degrades rapidly when the signal strength falls below a critical threshold, whereas FM reception quality degrades slowly with the decreasing signal.

An upgraded version of the system, namely DAB+, was introduced in Europe in 2007 with Gibraltar launching the new digital network in 2012. DAB+ is approximately twice as efficient as DAB and provides a more robust service with higher quality audio.

Europe's digital radio roll-out however is fragmented and disjointed. Countries such as Denmark, Norway, Switzerland and the United Kingdom are all considered to be at the forefront of the implementation of digital radio with extensive coverage and an average of almost 50% penetration of digital receivers in households. However, the majority of European countries⁶ are struggling to provide digital radio services to their major cities.

This year, Norway has started switching off their FM radio network, making them the first country to transition to digital radio and set this as the national standard. In Germany and the Netherlands, some national radio stations have switched off their FM and AM frequencies to concentrate on their digital distribution but it appears that the key to expanding digital coverage lies within the motor vehicle industry and the inclusion of digital radios in new cars. In fact, in the UK, 80% of all new cars are fitted with digital radios and Switzerland has made a commitment to equip 300 motorway tunnels with DAB+ by 2019. Unfortunately however, the DAB and DAB+ roll-out across all of Europe will not happen until the major European motorways are fully covered and the current small pockets of DAB coverage, often referred as DAB islands, are all linked together. .

Gibraltar for example, currently provides a DAB+ service with a population coverage of 90%⁷. However, according to our results, the uptake of the DAB+ service is limited. Only 8% of the population regularly listen to digital radio and this is not surprising when you consider that there are only two services currently available.

⁶ As documented by EBU MIS - Digital Radio 2017 (<https://www.ebu.ch/publications/digital-radio-2016>)

⁷ As recorded by WorldDab (<http://www.worlddab.org/country-information/gibraltar>)

Gibraltar is a true DAB+ island and will remain so for the foreseeable future as the uptake of DAB+ in neighbouring countries is delayed. Portugal's DAB+ roll-out is still awaiting a Government decision and Spain's national DAB coverage was reduced from 52% to 20%, currently only providing coverage in Madrid, Barcelona and Valencia, with a planned expansion to DAB+ on standby since 2011.

If the driving force for expansion of digital radio coverage in Europe is the motor vehicle industry, it would be reasonable to expect that all new cars would be fitted with digital radios. In Gibraltar however, this does not seem to be the case. We asked all local car dealers if digital radios were included in their new cars and the results have been tabulated below:

CAR MANUFACTURER	STANDARD	OPTIONAL	UNAVAILABLE
Audi		X	
BMW	X		
Dacia			X
Ford		X	
Honda	X		
Hyundai		X	
Jaguar		X	
Kia		X	
Lexus	X		
Mercedes Benz	X	X	
Mitsubishi	X		
Peugeot			
Renault			X
Smart		X	X
SsangYong			X
Suzuki			
Toyota		X	
VW		X	

Figure 17. Provision of digital radios in new cars

Figure 17 shows that only 5 of the 18 car manufacturers provide digital radios as a standard feature. The majority of car manufacturers do nevertheless provide digital radios as an optional extra for buyers.

Results from Figure 7 show that 78% of the population listen to the radio in their cars but if cars are not fitted with DAB+ receivers, then the population cannot fully appreciate the benefits of this new technology.

INTERFERENCE

Interference is a problem to all radio systems, especially for analogue FM stations. It may prevent reception altogether, may cause only a temporary loss of a signal, or may affect the quality of the sound produced. The two most common causes of interference are transmitters and electrical equipment.

We used the Radio Audience Survey to obtain feedback on whether listeners benefitted from clear, uninterrupted reception or frequently experienced interference problems around the Rock. The results are set out in Figure 18 below:

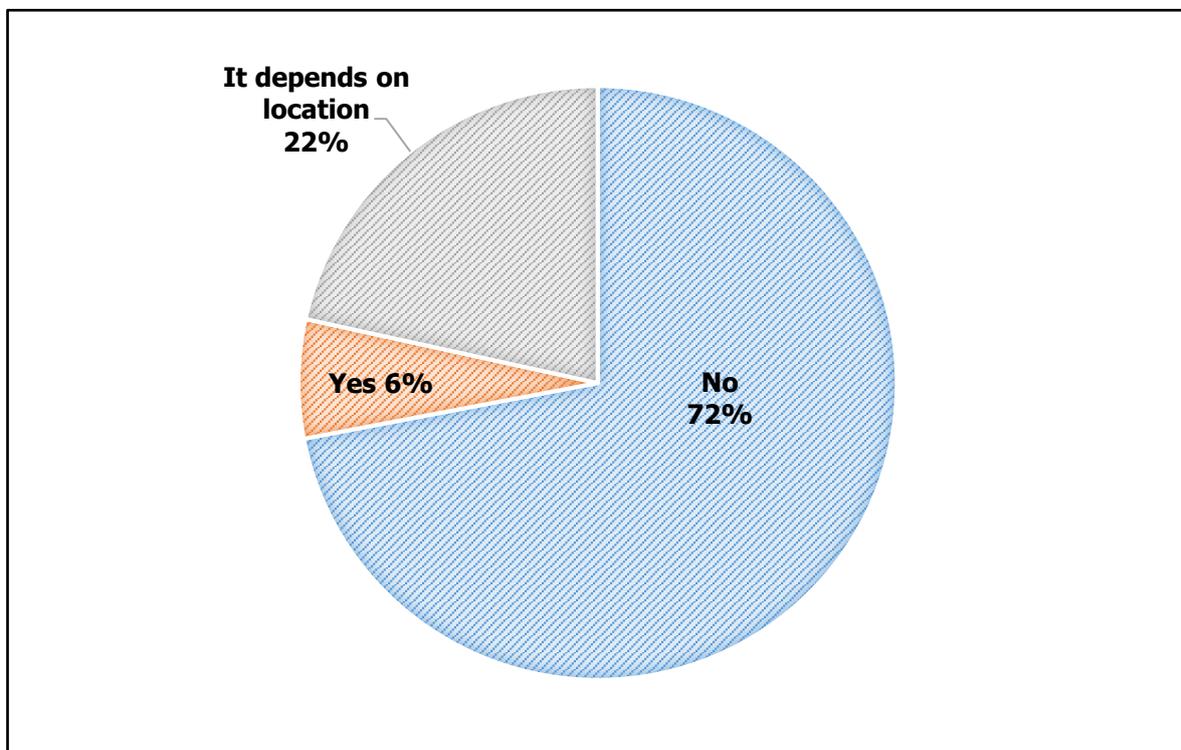


Figure 18. Information about local interference problems

It should be noted that due to Gibraltar's topography, coverage of certain areas is quite difficult, especially on the East side of the Rock. A total of 28% of the population reported loss of radio coverage or encountered problems with interference, with 22% highlighting that such problems arose in specific locations.

The reports of interference were grouped into the different districts in an attempt to properly assess what areas of Gibraltar encountered the most problems with interference. These have been mapped below.

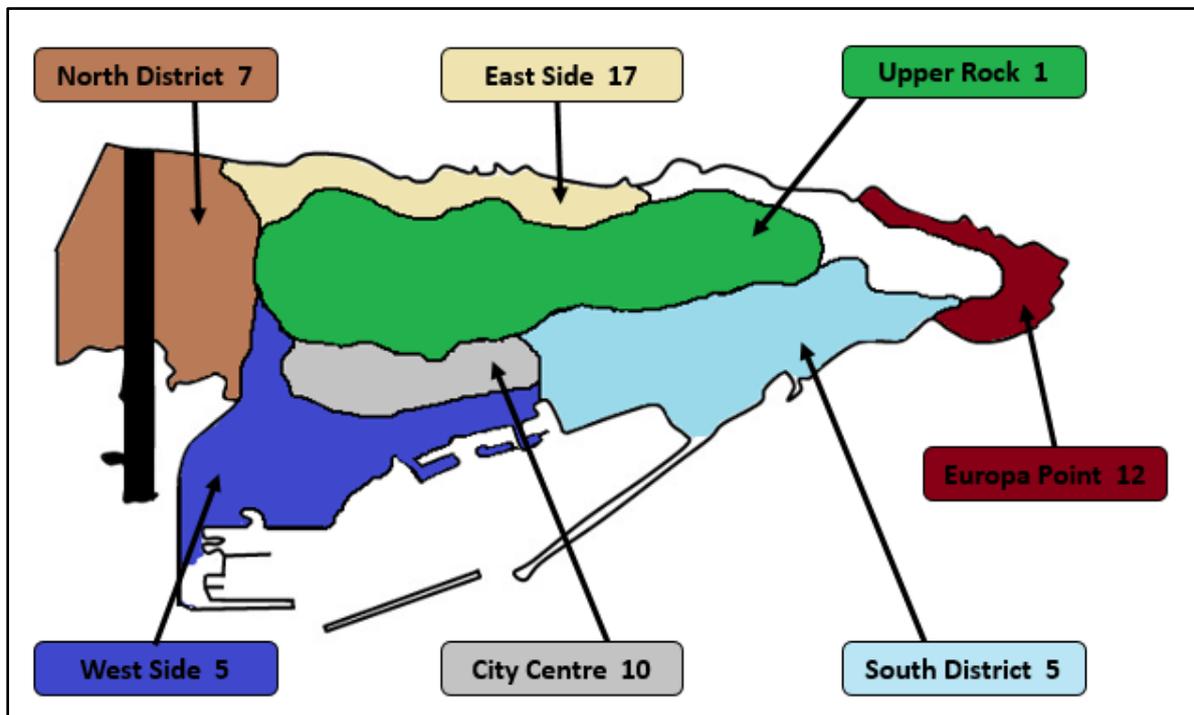


Figure 19. Local districts affected by interference

It is important to note that not all participants stated where exactly they experienced interference but it can be seen from Figure 19 above, that Europa Point and the East Side of the Rock are the most problematic areas. Whilst Gibraltar's topography presents us with difficulties to secure full radio coverage throughout the Rock, the GRA will be conducting further studies to identify whether the interference problems are due to poor reception or specific interference from neighbouring FM channels.

CLOSING STATEMENT

With all the advancements in technology, particularly certain music streaming tools, many are quick to assume that the traditional purpose of radio is dying. Whilst the more conventional broadcast seems to have taken a back seat to other, newer, on-demand services, radio is very much still a popular medium for a significant 78% of Gibraltar's population.

Radio provides the population with a free, widely available, reliable service. Radio continues to play a very important role in the lives of people, especially the older generations who rely on this service for information and entertainment. Radio broadcasters are regarded as credible sources of information. It requires little effort of its consumers to comprehend its message and may be perceived as a good companion that distracts and enlightens its listeners.

The GRA's first Radio Audience Survey has proved useful to the Broadcasting Division; an initiative which will be repeated in the near future to further explore the listening habits of the local population and to identify any changing trends.

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