DIGITAL RADIO USE IN SWITZERLAND

Trend analysis, spring 2020

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The spring 2020 round of the survey was conducted during the exceptional situation in Switzerland caused by COVID-19 (6-19 May 2020). The radio usage it shows may not correspond to the digitisation trend that is otherwise observable due to the differences in everyday life during this period (short-time working, working from home, less travel) from the norm. The latest developments will need to be compared to future rounds of the survey.
Switzerland increasingly listens to digital radio

Digital radio is on the rise and is replacing FM radio. 71% of radio usage is already digital.

Radio usage volume (in percent) by type of reception

Source: GfK Switzerland, DigiMig survey, n(2015/2)=2'453, n(2016/1)=2'526, n(2016/2)=2'531, n(2017/1)=2'504, n(2017/2)=2'519, n(2018/1)=2'673, n(2018/2)=2'740, n(2019/1)=2'800, n(2020/1)=2'800

The spring 2020 round of the survey was conducted during the exceptional situation caused by COVID-19.
FM is continuing to lose ground to DAB+ and IP radio. 39 out of every 100 radio minutes are listened to via DAB+.

DAB+ usage is growing faster than IP usage, which is growing more slowly but has now overtaken FM.

Radio usage volume (in percent) by type of reception

Source: GfK Switzerland, DigiMig survey, n(2015/2)=2'453, n(2016/1)=2'526, n(2016/2)=2'531, n(2017/1)=2'504, n(2017/2)=2'519, n(2018/1)=2'673, n(2018/2)=2'740, n(2019/1)=2'800, n(2020/1)=2'625

The spring 2020 round of the survey was conducted during the exceptional situation caused by COVID-19.
Radio use by language region

Digital radio is on the rise in all regions of Switzerland. DAB+ in particular is growing and has now also overtaken FM in Italian-speaking Switzerland (SI). DAB+ remains the most popular reception mode in German-speaking Switzerland (DS), while DAB+ has overtaken IP in French-speaking Switzerland (SR).

Radio usage (in percent) by reception type and language region


DIGIMIG - the research project on the digital migration of radio usage in Switzerland
Radio use by age
Digital radio now accounts for more than 64% of usage in every age group. Digital migration is most advanced among the young, with IP radio being the strongest vector. DAB+ is most popular among the 55+ age group.

Radio usage (in percent) by reception type and age groups

<table>
<thead>
<tr>
<th>AGE</th>
<th>15-34</th>
<th>35-54</th>
<th>55+</th>
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<tbody>
<tr>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>34%</td>
<td>28%</td>
<td>20%</td>
</tr>
<tr>
<td>2016</td>
<td>40%</td>
<td>30%</td>
<td>25%</td>
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<tr>
<td>2017</td>
<td>42%</td>
<td>31%</td>
<td>18%</td>
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<tr>
<td>2018</td>
<td>33%</td>
<td>42%</td>
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<tr>
<td>2019</td>
<td>20%</td>
<td>34%</td>
<td>19%</td>
</tr>
<tr>
<td>2020</td>
<td>36%</td>
<td>36%</td>
<td>19%</td>
</tr>
</tbody>
</table>


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Radio usage by usage site
Radio usage is greatest at home, accounting for 65 of each 100 minutes of listening time. Usage at work accounts for 18 of each 100 minutes, while in-car listening makes up 12 minutes.

Radio usage (in percent) by reception type and usage location

- **Home**: 65% (+4% change compared to 2015/2 in percentage points – COVID-19)
- **Work**: 18% (-3%)
- **Car**: 12%
- **Sports**: 3%
- **On the way**: 2%
- **Others**: 1%

Source: GfK Switzerland, DigiMig survey, n(2020/1)= 2'625

The spring 2020 round of the survey was conducted during the exceptional situation caused by COVID-19.

The figures represent total radio usage on stationary and mobile devices by usage location.
Radio usage by usage location and reception type

Digital radio has now also overtaken FM in cars, where 55% of radio usage is now via DAB+ or the Internet. FM usage at work has declined from a third to a fifth in the space of a year.

Radio usage (in percent) by reception type and usage location

- **Home**: DAB+ usage is the most used at home, with 39% of total DAB+ usage. IP radio is catching up and has overtaken FM at home and at work.
- **Work**: DAB+ is now the most used reception mode at work (43%), with a 16% increase compared to last year.
- **Car**: DAB+ has now also overtaken FM in the car (47%, +9 pp in a year).
- **Sports** and **On the way**: DAB+ and IP use are increasing in these locations.
- **Others**: FM usage is declining sharply at work (-11 pp in a year).

The lion's share of DAB+ usage (64% of total DAB+ usage) takes place at home. (+3 pp compared to last year).

DAB+ is now the most used reception mode at home (39%), at work (43%) and now also in the car. FM is declining sharply at work (-11 pp in a year).

DAB+ has now also overtaken FM in the car (47%, +9 pp in a year).

IP radio is catching up and has overtaken FM at home and at work.

Source: GfK Switzerland, DigiMig survey, n(2020/1)= 2'625

27.08.2020

DIGIMIG - the research project on the digital migration of radio usage in Switzerland

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Personal ranges of the reception vectors

Three quarters (74%) of the population uses digital radio. Half of these people still use FM radio. 36% of the population uses digital radio exclusively, while 13% listens only to FM radio.

Range of reception vectors (in percent)

- **FM** (Σ = 52%)
  - 13% (–11) change compared to 2015/2 in percentage points
- **DAB+** (Σ = 52%)
  - 13% (–2)
- **Digital Radio (IP/TV/DAB+)** (Σ = 74%)
  - 15% (+9)
  - 12% (+7)
  - 13% (+9)
- **IP/TV** (Σ = 49%)
  - 9% (+2)
- **no radio**: 10% (+4)
- **not allocable**: 3% (+0)

**FACTS**

74% of the population use **digital radio** (DAB+ or IP/TV). 36% exclusively use digital radio. The share of "Digital Only" listeners has grown strongly, compared to four and a half years ago (+14 percentage points [PP]).

51% still use **analogue radio**. This is a decrease of 24 PP compared to autumn 2015. 13% use only FM and no other vector.

52% use **DAB+**. 12% exclusively use DAB+. The proportion of "DAB+ only" listeners has more than doubled in four and a half years.

49% use **IP radio or radio via TV**, but only 9% use IP or TV exclusively.

Source: GfK Switzerland, DigiMig survey, n(2015/2)=2'453, n(2020/1)=2'625

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DIGIMIG - the research project on the digital migration of radio usage in Switzerland

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Development of personal reach over time

Only 13% of the population still listen exclusively to FM radio. Around three quarters of the population (74%) listens to digital radio, while 36% no longer listens to FM radio but only to digital radio.

Radio usage volume (in percent) by reception method

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Source: GfK Switzerland, DigiMig survey, n(2015/2)=2'453, n(2016/1)=2'526, n(2016/2)=2'531, n(2017/1)=2'504, n(2017/2)=2'519, n(2018/1)=2'673, n(2018/2)=2'761, n(2019/1)=2'740, n(2019/2)=2'800, n(2020/1)=2'625
KEY MESSAGES

Radioland Switzerland goes digital

- 71% of radio usage is digital
- +22 percentage points more in 4½ years
- 39% is via DAB+ (FM: 29%)
- >70% is digital in all language regions
- 77% is digital for people under 55
- 13% of the population still listens only to FM Radio
- 47% of in-car usage is DAB+ (55% digital)

Source: GfK Switzerland, DigiMig survey, n(2020/1)=2'625.

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