

EUR(O)RADIO

OPERATED BY EBU

PLANET OF THE APPS

APRIL - OCTOBER 2013



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1.0 INTRODUCTION

A survey of 556 media apps from 71 EBU Member organizations in 43 countries was the basis of a broad study conducted by EURORADIO in recent months.

Below is an overview of the main results of the study, which was supplemented by additional questionnaires.

Different devices in the past:

RADIO...



PHONE...



MAP...



CAMERA...



... TODAY ALL-IN-ONE, EITHER AS GLASSES OR AS AN APP.



1.1 BACKGROUND

As is well known, our media world is becoming more and more fragmented, while the ways and means of media distribution and consumption are converging. Television is becoming hybrid, radio is going visual, and both are meeting on the Internet. Newspapers and print magazines are producing videos and audio, ordinary citizens are becoming amateur journalists. The struggle for visibility and recognition gets tougher every year, and branding is an important issue.

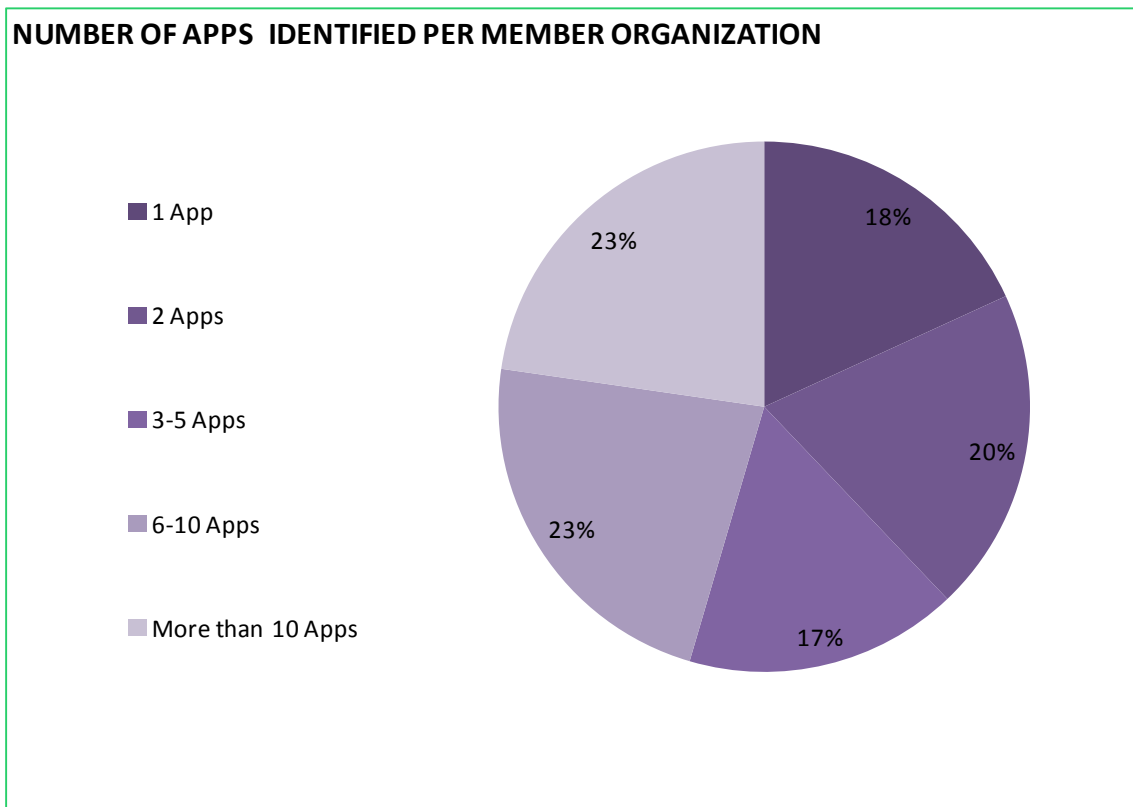
These developments are the background music to the rapid rise of mobile phones that offer far more than the simple telephone function. Since Apple launched its iPhone in 2007, it has been all about apps. With the arrival of the iPad in 2010, tablet computers have become an important part of the mix.

The first media apps from Public Service Media (PSM) appeared in 2008.

An app is a self-contained world, be it an office application, a game, a travel guide or a radio station. Apps are able to promote a certain brand. And as our study shows, there are dozens of different ways to construct a media app. Therefore we analyzed not only the technical platforms but also the content and the strategies behind the apps. In short, we wanted to know the success factors for an app – and, of course, the factors that can lead to failure.

ALL APPS

Total Member organizations	71
Total apps identified	556

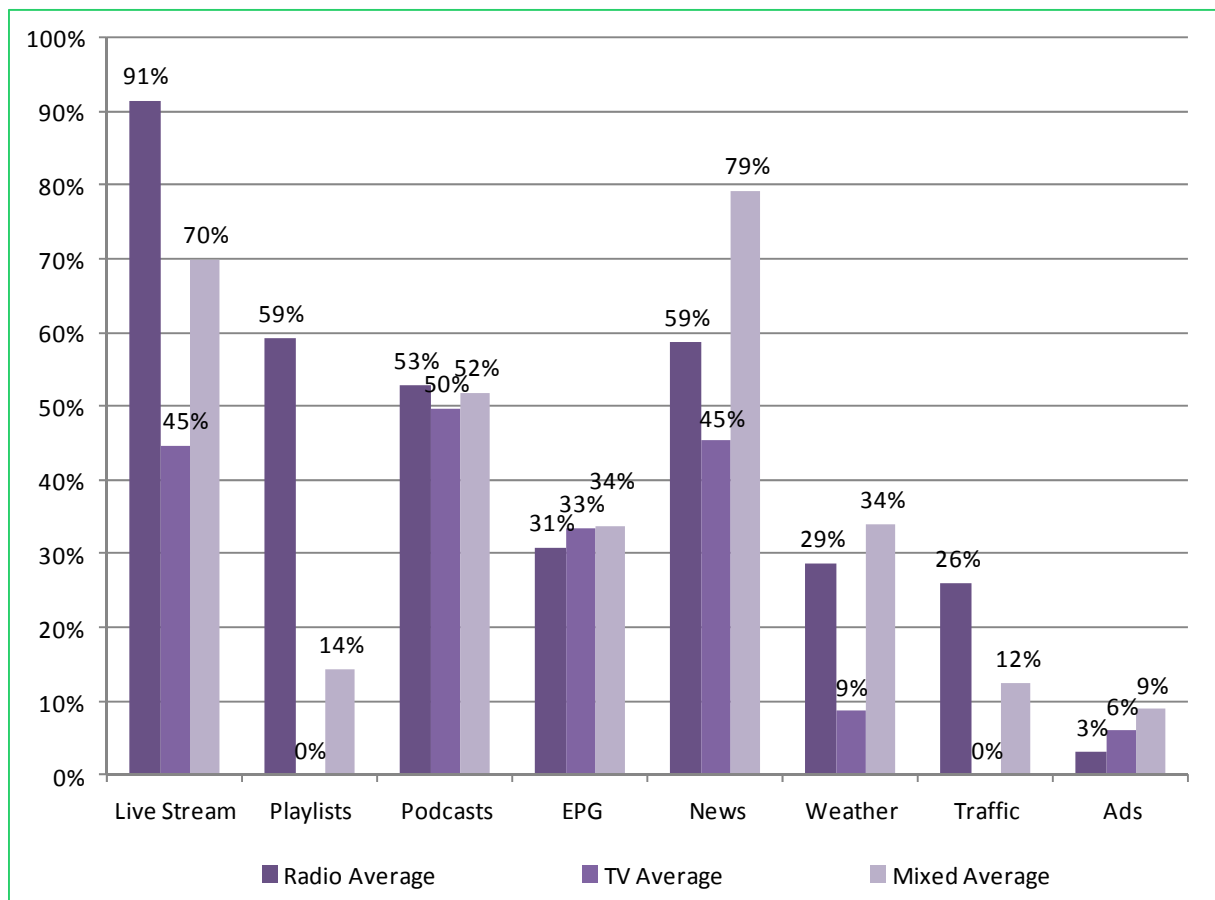


Number of apps identified

1.2 FEATURES

AUDIO DOMINATES

The most popular feature in apps from PSM is a live audio stream, mostly provided as MP3 (128 kbps), offered by 90% of organizations surveyed. Live video streams are provided only by 38%. The standard codec used for live video is H.264, with MPEG-4 and HLS as exceptions. So live audio streaming seems much easier to realize, more cost-efficient and easier to manage than live video streaming. Video is also more complicated than radio from a rights perspective.



Apps offered

Some questions in the survey concentrated on workflow issues and on the connection between desktop, mobile and app content.

As of today slightly more than half of our respondents do not have a dedicated mobile version of their website. Having an app appears to have been the priority for most, and of those that do not have a dedicated mobile website, only 39% plan to create one soon. Others are still deciding whether to launch a mobile or responsive website, citing cost as an issue for responsive design.

1.3 MEASUREMENT CHALLENGES

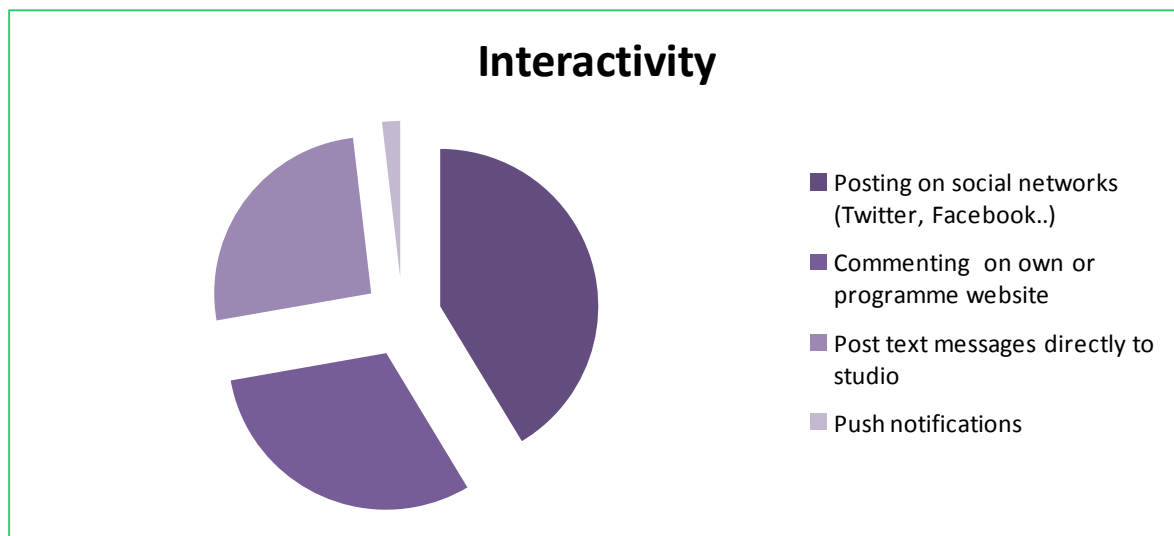
One of the biggest challenges is to obtain high-quality user data.

94% of organizations answering the survey have a tool to monitor website traffic, and 81% have one to monitor their app traffic. Half of them use Google Analytics to monitor website and app traffic, while others use ComScore.

The problem is to compare off-air listening figures to live stream via the app and to podcast downloads. There is still the need for a comparable "currency" on audience. This will be a task for the future to develop coherent measuring tools across all platforms.

Of course, interactivity is an important feature of apps. 46% of the organizations answering the survey said they use their app as an interactive tool. The most popular is posting to social networks (67%) such as Facebook and Twitter, followed by commenting on the organization's or programme's website (50%). And 42% even allow their users to post text messages directly to the studio or the presenter of the show.

Compared to this, push notifications are not used widely: only a third use them for breaking news, and some others for sports results, crime alerts and song titles.



When asked whether their app had met their expectations, the answers were not overwhelmingly positive: rated on a scale of 1 to 10, the average score was 6.0. It is clear that many responders are not fully satisfied with their apps - or perhaps had higher expectations. Almost four fifths of organizations plan to add new functions to their app(s).

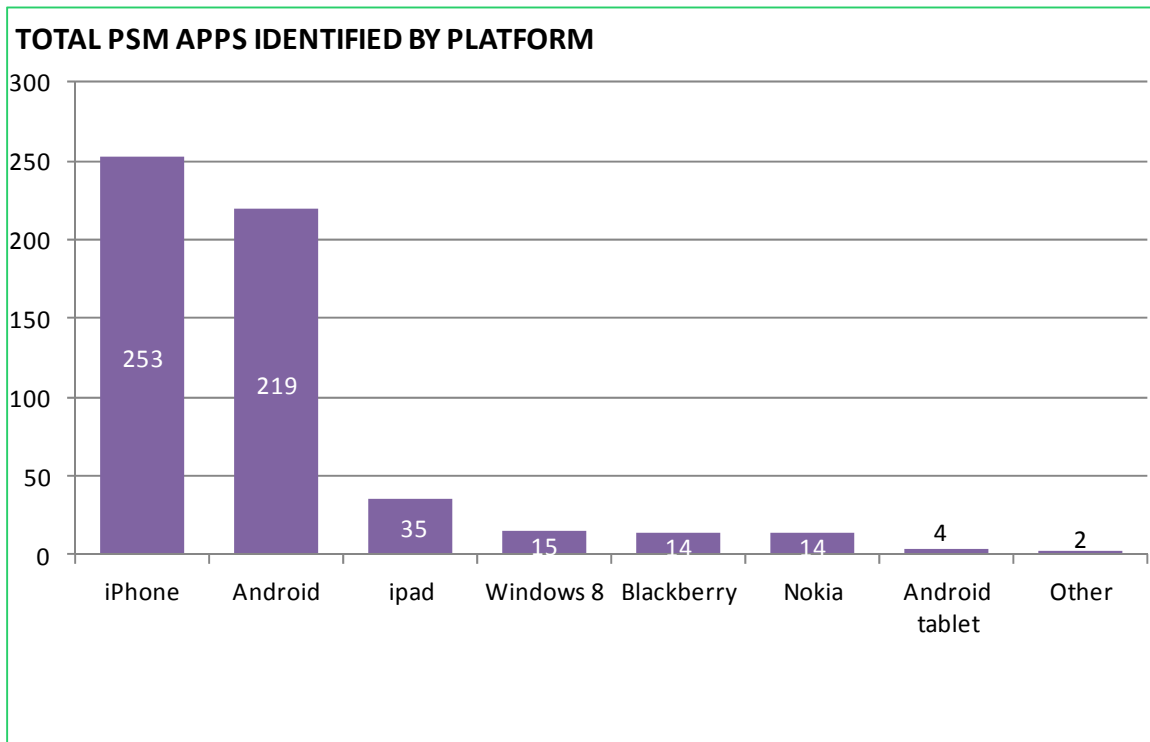
The key functions to be included reflect the most favoured features: EPG and podcasts, followed by weather info and links to internal websites. Some want to increase the number of their apps. Others, for example in France and Switzerland, intend to launch a national radio player app together with commercial competitors. In general, the app landscape across European PSM is very diverse and illustrates the tough struggle for visibility in the ocean of media and services.

If the new trend - national radio players - does prevail, we will know only in a few years.

(see p.36 - Bottom navigation)

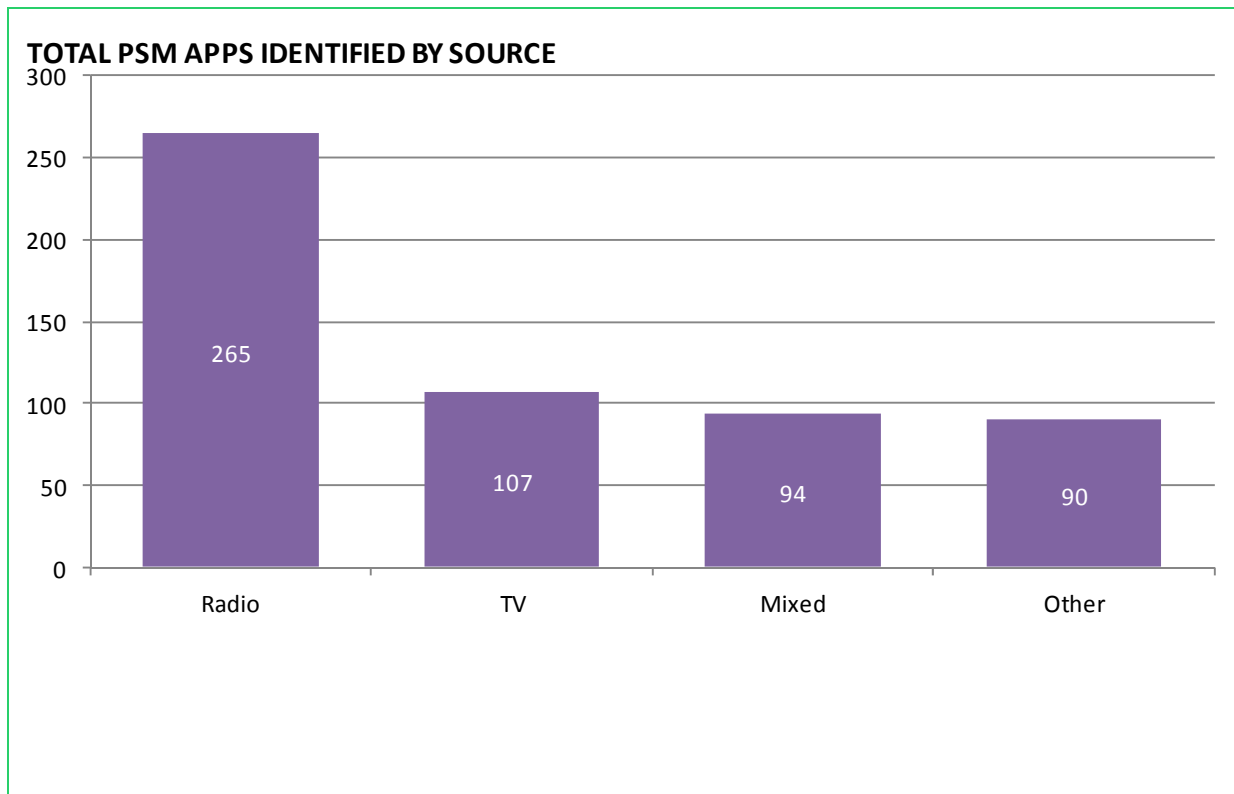
1.4 INTERMEDIATE RESULTS - KEY FINDINGS

- iOS is most popular, followed by Android. Windows, Blackberry and Nokia are far behind;
- Eight apps per Member on average, reflecting branding per channel or even per programme;
- 13 apps per country on average;
- 265 pure radio apps; 107 pure TV apps; 184 mixed and other (e.g. games, etc.).



Total apps identified by platform

- Most popular features are live radio streams, playlists, news and podcasts;
- Most Members prioritized app development over mobile or responsive websites;
- Audience measurement is difficult, with no comparable “currency”;
- Success is based on brand, user-friendly stable functions and use of a popular technical platform;
- 65% developed their apps per platform; 21% relied on HTML 5;
- National radio player apps combining PSM and commercial radio may become a new trend.



Total apps identified by source

2.0 DETAILED ANALYSIS - MORE SURVEY DATA

During the first months of 2013, there was quite a bit of news describing the booming mobile and app market. For instance, the [Heise news service announced](#) that in 2012 the turnover in apps in Germany had more than doubled! This was seen as a direct effect of the steep rise in the sale of tablets and smartphones. For the latter a 29% increase was expected for 2013, an equivalent of 28 million devices sold.

Statistics also showed how many minutes users devote to apps on their mobile devices. [People are really addicted to their apps](#), accounting for more than half of their mobile time, with no big difference among US, Chinese and British users. Significantly less time is spent on browsing and voice features.

Interestingly enough, a study by Danish Radio revealed: "24% listen to radio via iPhone." (Erik Kjeldsen, DR, June 2013)

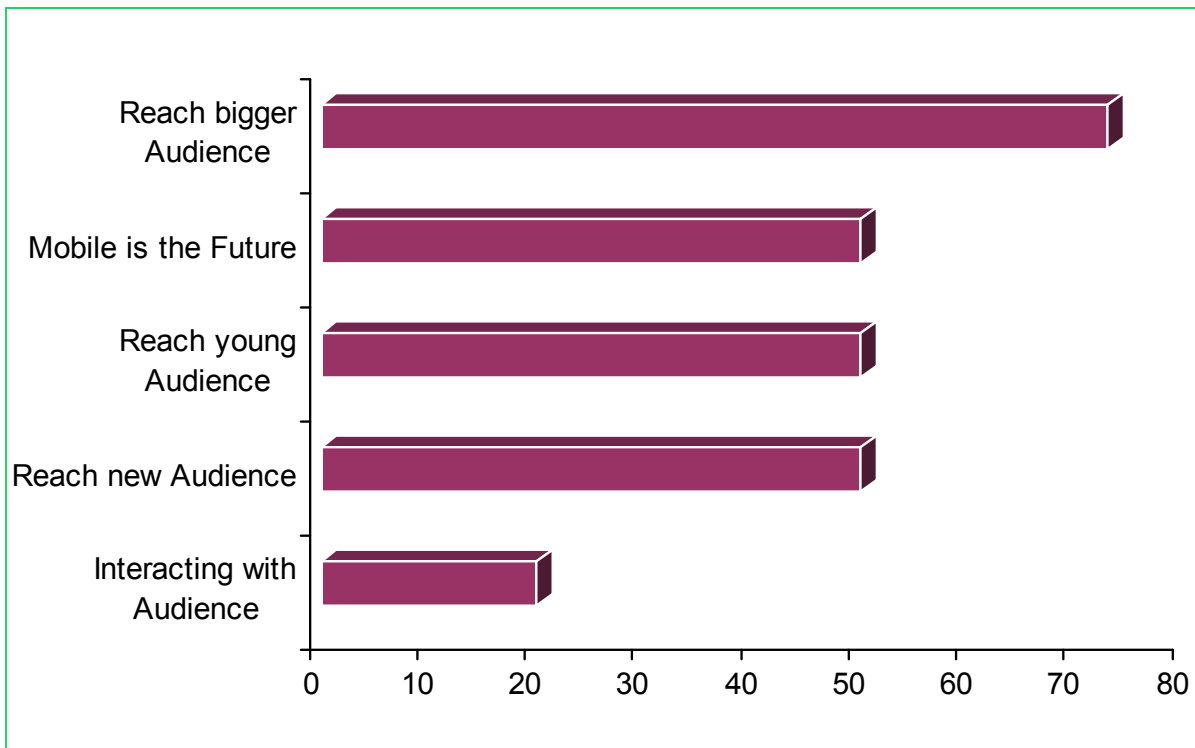


Other effects of the heavy use of apps are already apparent. [Ericsson, for example, noted quite clearly](#): "The explosive growth in smartphone and app use has put a new focus on cellular network performance."

2.1 KEY OBJECTIVES

The first question to the participating organizations in this survey was: why did you develop your app(s)? More than one answer was allowed.

“To reach a bigger audience” (73%) is clearly reason number one for investing in apps. “To reach a young respectively a new audience” came on place two, together with “mobile is the future” (50% each). Whereas “interacting with the audience” was a key objective for just six organizations (Latvia, Poland, Greece, Lithuania, Cyprus, and Spain).



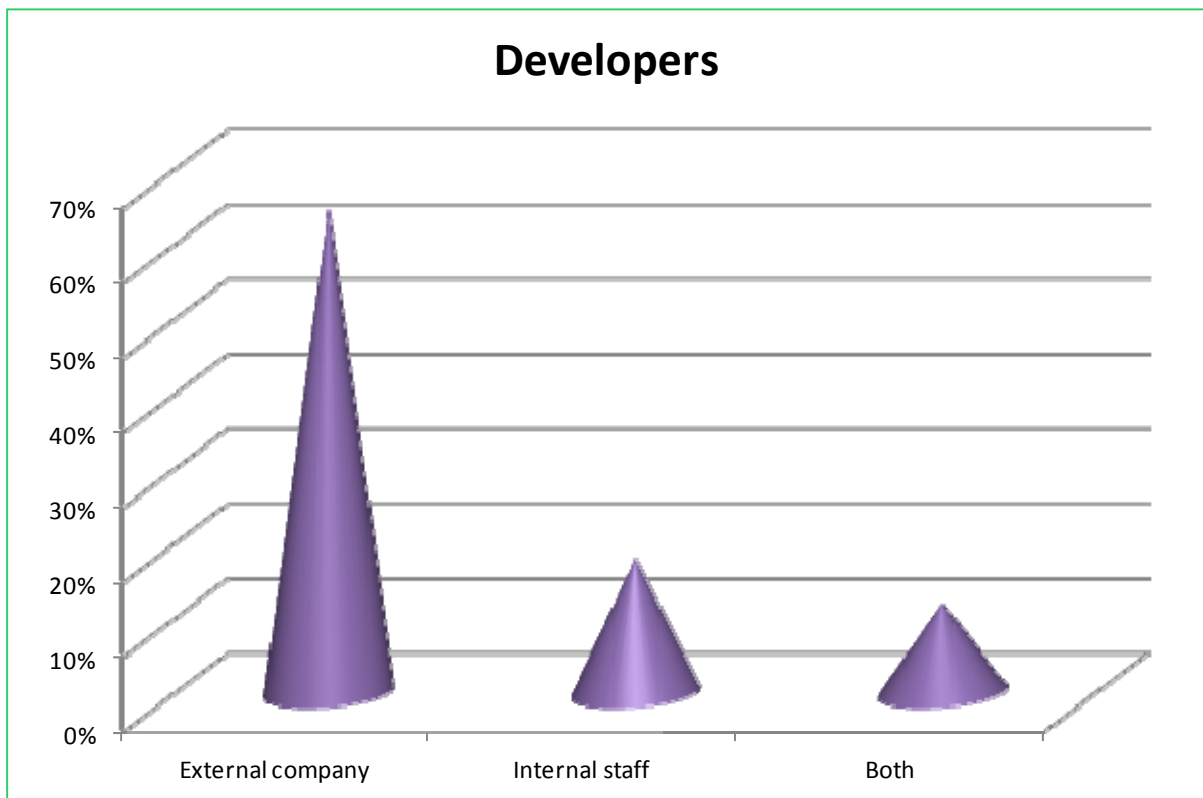
Other reasons include:

- Expected by our current audience (Germany);
- Offer a public service in mobility (Spain);
- Offer another way to listen to our digital stations (Czech Republic);
- Make money (Denmark);
- Reach primary audience, which is educated people with higher income (Lithuania);
- Exploration (Switzerland).

2.2 TECHNICAL ISSUES AND APP DEVELOPMENT

Broadcasters tend to be very trendy because almost all the organizations that responded to the questionnaire launched their first app from 2008 on, shortly after the first smartphones (iPhones) were sold in Europe. Technically speaking, 65% used SDK (specific development knowledge per platform) to develop their apps, a fifth (21%) used HTML 5, and 12% used both. Other technologies used are WebView and Flash, the latter despite knowing that iOS products do not support Flash applications.

The majority of organizations entrusted app development to external companies (65%). Only 18% have the capacity and expertise to create apps internally, while 12% have a mix of internal and external development. This seems to be a trend: it no longer matters having specific development knowledge in-house. Not only is it cheaper to employ external experts but also the ability to react to new technology is better.



MP3 AND H.264 DOMINATE

Initially, most stations (90%) have focussed on offering live audio streaming of their radio programs. 62% have no live video streams at all. The most popular technical quality provided with audio is mp3-128kbps (almost 50%). In terms of video, all the relevant apps provide H.264 as codec. RTVE Spain also provides HLS for Live Stream, ARD Germany provides H.263 and TVP Poland provides MPEG-4.

MOBILE WEBSITE AND TABLET

After years of experimenting with and establishing successful Internet pages accompanying radio programs, Members had to decide not only to launch apps, but also to optimize their websites for mobile users. Until now, around 50% run an extra mobile version of their websites. Only two organizations have realized dynamic websites (DR, Denmark and CYBC, Cyprus), which react automatically and are displayed on every screen size accordingly. Significantly, among the 51% of organizations that do not have a mobile website, half plan to launch a dynamic website. 39% will launch a mobile website, mostly in the latter half of 2013. Others are still in the process of deciding whether to launch a mobile or a dynamic website, citing costs as an issue for dynamic design.

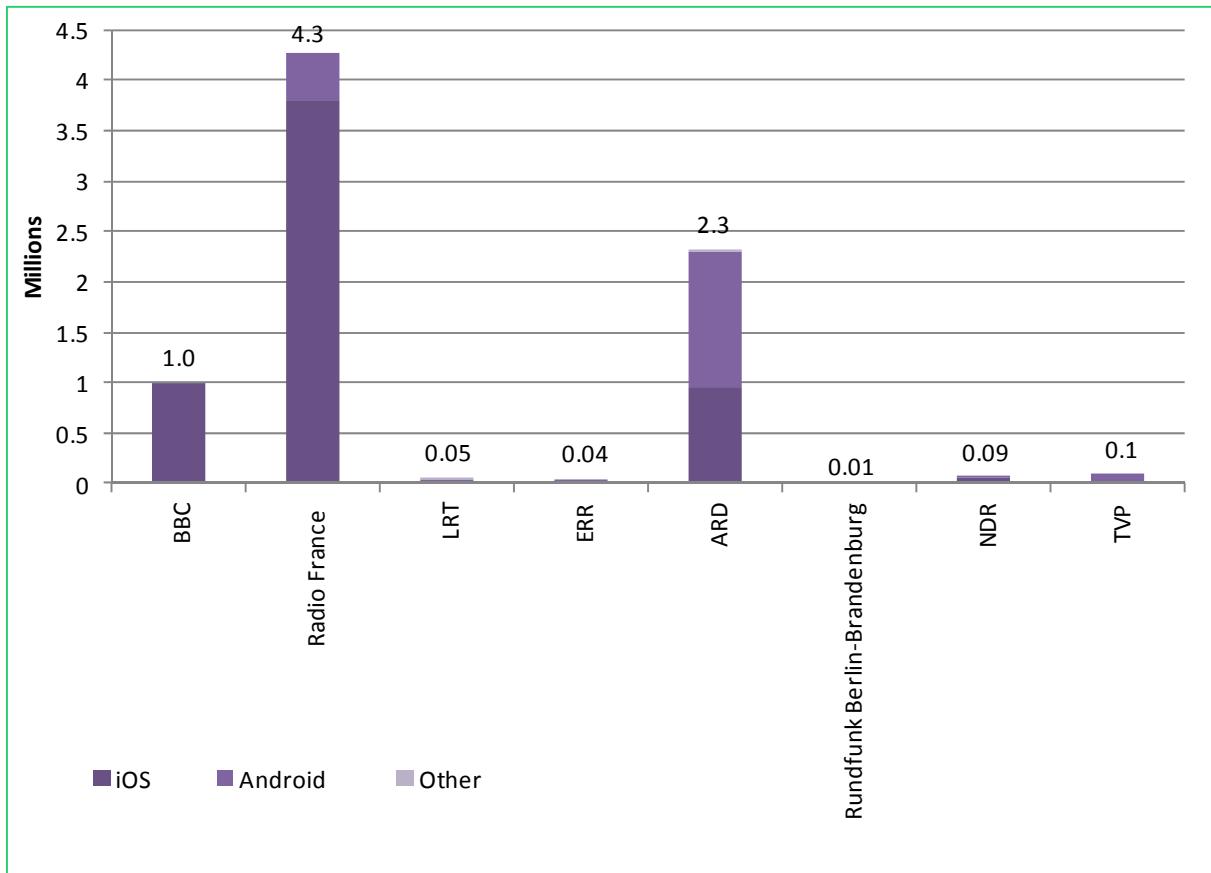
Regarding the appearance on tablet computers, 26% have a special tablet app, and 11% plan to offer one soon (HRT Croatia, Radio France, RTR and RTS Switzerland).

MONITORING TRAFFIC - STATISTICS

94% of organizations have one or even more special tools to monitor their website traffic, so knowledge about the real use of their Internet pages seems to be important for them. We did not specify in this context if Members are able to use cookies or not, and some do have legal restrictions. The most popular online tracking tool is Google Analytics (34%), followed by ComScore (15%). Among the 38% of organizations that use more than one measurement tool, one of the tools is either ComScore or Google Analytics.

81% also run at least one tool to monitor app traffic. Again the most popular is Google Analytics (31%), followed by ComScore (15%). Regarding the measurement of app traffic compared to website traffic, slightly more organizations use a second tool (46%). When it comes to concrete statistics, the majority of Members know the number of app downloads, but other details remain difficult to obtain.

Number of app downloads in 2012



2.3 FUTURE CHALLENGES: COMPARABLE TRAFFIC DATA

Most organizations do not yet compare website, mobile and app statistics. Key reasons are the technical limitations of the current statistics, making it impossible to compare them. In other words, one of the future challenges is to obtain better and comparable data on the real use of mainly IP-driven program delivery. To date, only five organizations compare mobile and app statistics with a view to understanding and evaluating content and user behaviour.

STATISTICS COLLECTED

iOS statistics

Country	Organization	Number of downloads of your app in 2012	Number of downloads of your app since availability
UK	BBC	1 mn	1.5 mn
France	Radio France	3,833,571	3,833,571
Lithuania	LRT	16,000	
Germany	ARD	0.96 mn	3.127 mn
Germany	Rundfunk Berlin-Brandenburg, rbb	ca. 6,000	ca. 120,000
Germany	NDR	60,000 Oct.-Dec. 2012	
Ireland	RTÉ		3 apps 800,000 total
Poland	TVP	19,500	21,455

Android statistics

Country	Organization	Number of downloads of your app in 2012	Number of downloads of your app since availability
France	Radio France	462,645	no data before 2012
Lithuania	LRT	28,000	
Estonia	ERR	36,229	
Germany	ARD	1.34 mn	2.11 mn
Germany	Rundfunk Berlin-Brandenburg, rbb	ca. 4,000	ca. 80,000
Germany	NDR	27,000 Oct.-Dec. 2012	
Ireland	RTÉ		3 apps 150,000 total
Poland	TVP	84,142	96,206

Other statistics

Country	Organization	Number of downloads of your app in 2012	Number of downloads of your app since availability
Lithuania	LRT	6,000	
Germany	ARD	18,250	113,360

2.4 WORKFLOWS

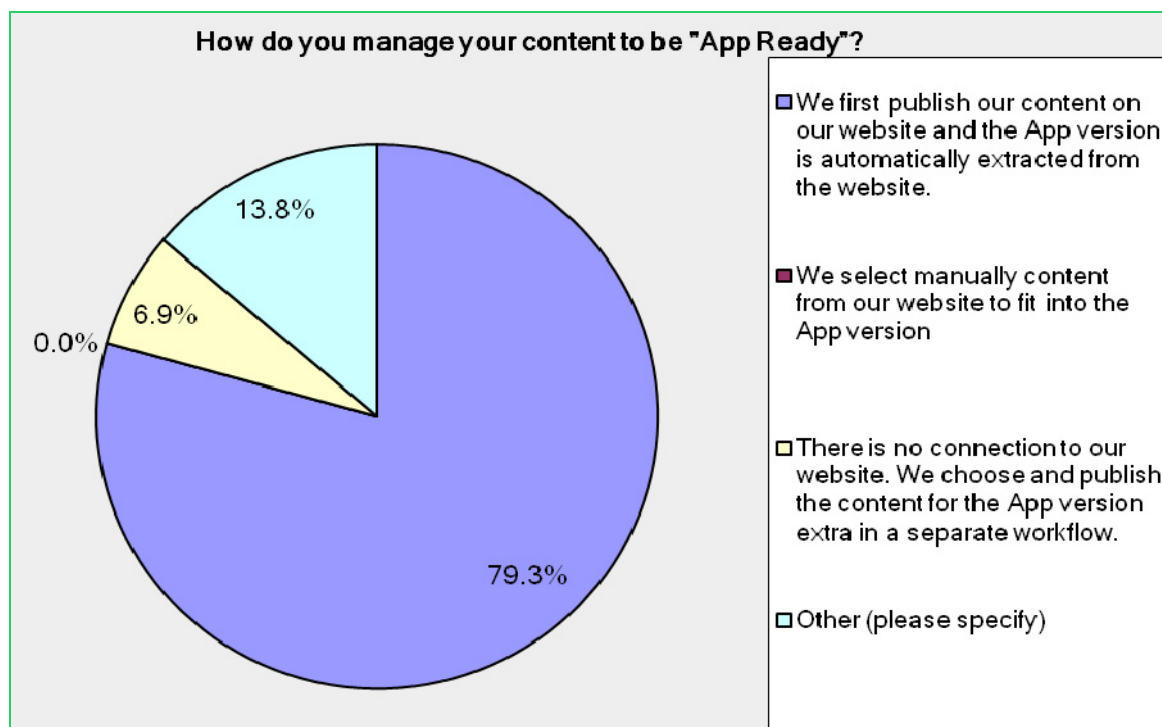
An important issue dealing with apps is the topic "workflow organization". Since normally public broadcasters do not receive extra money to develop on-line and mobile distribution platforms in addition to on-air broadcasting, the objective is to realize the maximum possible automatic content workflow.

The majority of PSM organizations first publish their content on their own website, and then the app version is automatically extracted from the website (79%). Among these organizations, two thirds supply their app with an automatic selection of their website content. Only the broadcasters in Poland and Switzerland (RSI Italian service and RTS French service) have an app where the content is 100% identical to their website. Whereas organizations in Germany and Bulgaria have apps with no connection to their website, they choose and publish the content for the app version extra and in a separate workflow. 62% are currently planning changes in their workflow to make content "app ready".

Overall, we perceive a broad variety of strategies on how to create and/or to transport app content:

Automatic one-to-one copy of the website content (Poland, Greece)

- Automatic selection of website content (Latvia, Switzerland [swissinfo and RSI], Germany);
- Manual selection of website content (Switzerland [SRF German service], France);
- Completely separated workflow between website and app (Algeria, Bulgaria);
- Manual or automatic selection according to the specific app (Spain);
- Modified back end to accommodate any granularity of content access (Lithuania).

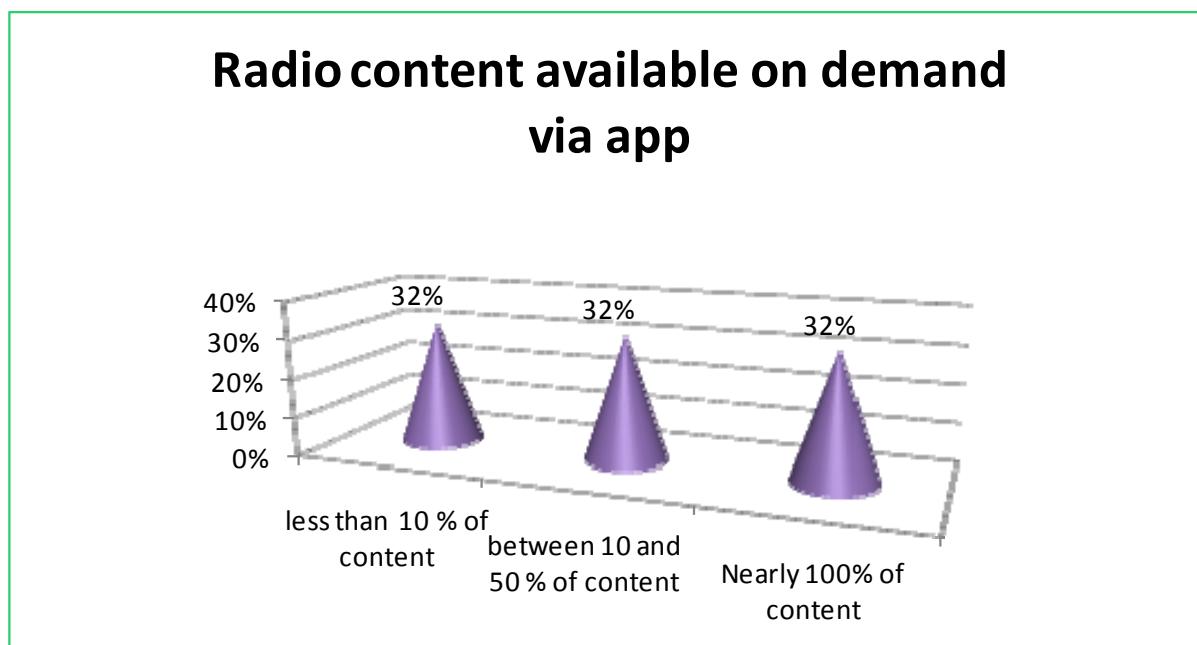


Content management

2.5 PODCAST - NOT ALL CONTENT, BUT QUICKLY AVAILABLE

Diverse strategies appear as well concerning the question of how much of the radio content broadcast live is available on demand later via the app. In fact, there is an even split of those with less than 10%, up to 50% and almost 100% of on-demand content (each 32% of all respondents). Just RTR (Switzerland, Romansch service) has 100% of its program available on demand in their app after the live broadcast. In terms of timing when the podcasts are published, almost every organization (92%) has them available after the show. An "on-line first" strategy, known from the news sector, seems not to exist for other radio content. The only exceptions were Greece, which used to publish podcasts before the show, and Switzerland, which publishes during the show.

(see p.61: Non-linear content)

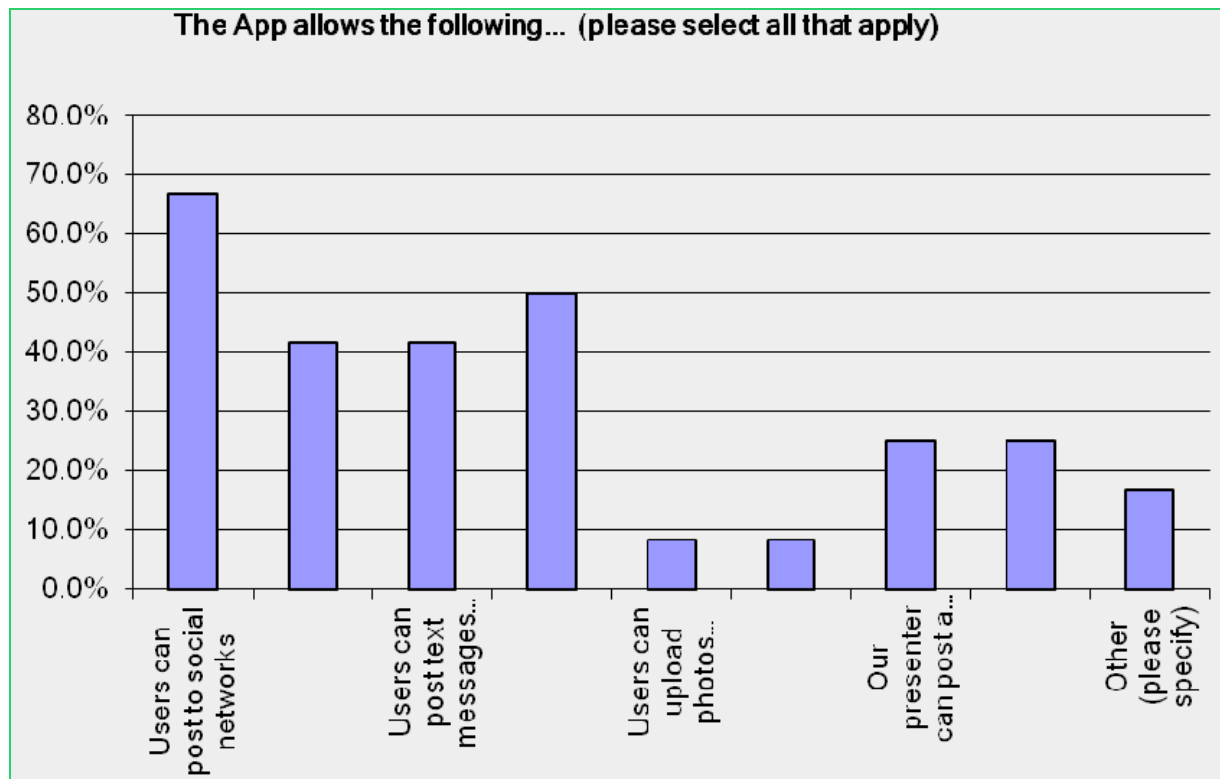


2.6 INTERACTIONS WITH THE AUDIENCE VIA SOCIAL NETWORKS

Around half of the organizations said they use their app as an interactive tool (46%). Not surprisingly, postings to Facebook and Twitter directly from the app rank first (67%). 50% allow users to comment on the program’s or station’s website through the app, and 42% offer users direct contact to the presenter in the studio enabling text postings to which the host can answer during the live show. Some of these stations also display messages on a special split screen together with a live cam of the studio.

Another means of coming into contact with the audience is to offer push notifications. Over half of the organizations use them, mainly for general news (26%) and breaking news (33%), but also for sports results and crime alerts (Denmark) or song titles / artists’ names (Croatia).

(see p.93: Performance vs. Expectation)



Interaction with the audience

2.7 VISUAL APPEARANCE

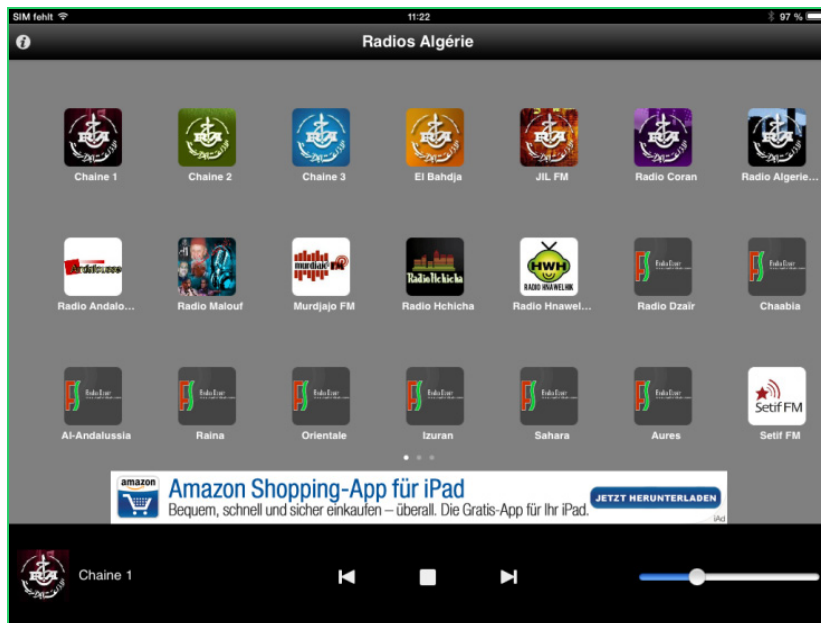
Let us take a closer look at layout, navigation and functionalities of media apps. Basically you will find three to four different types according to the amount of content and how this content is displayed.



Small budget, but big effect with responsive design: Luxembourg's Radio 100,7

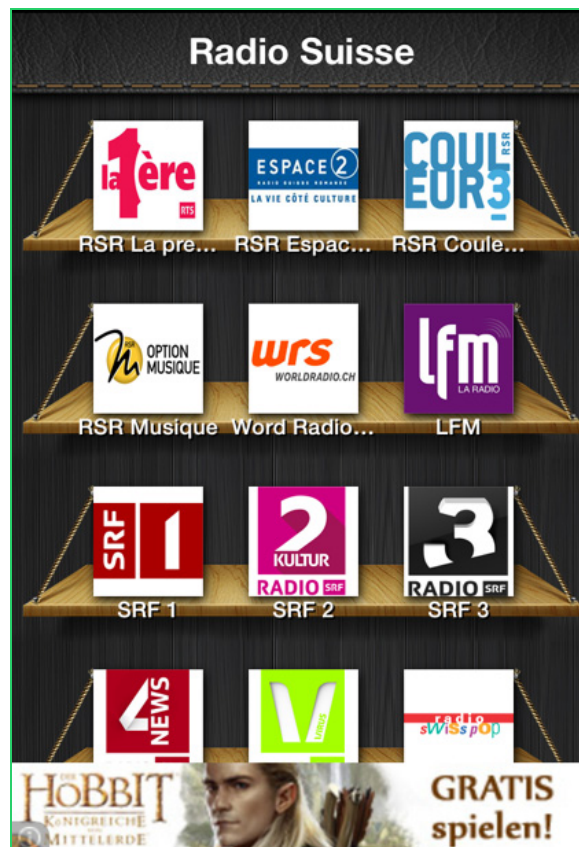
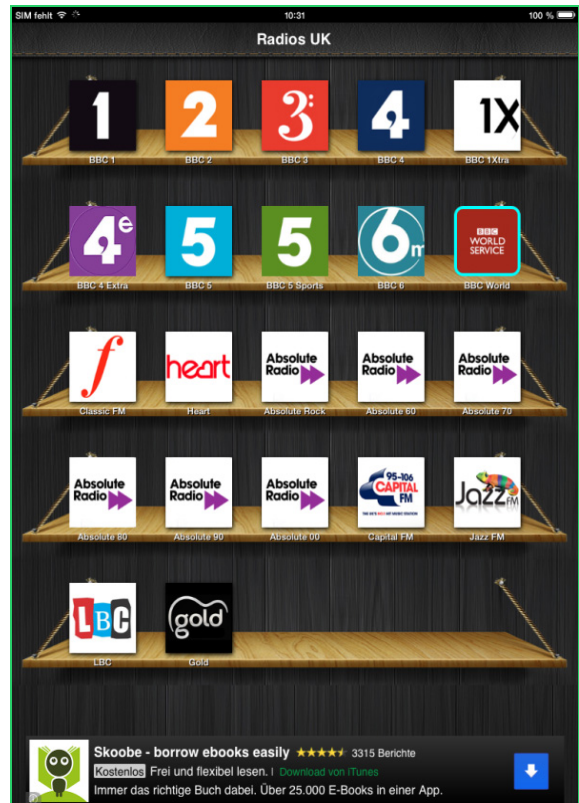
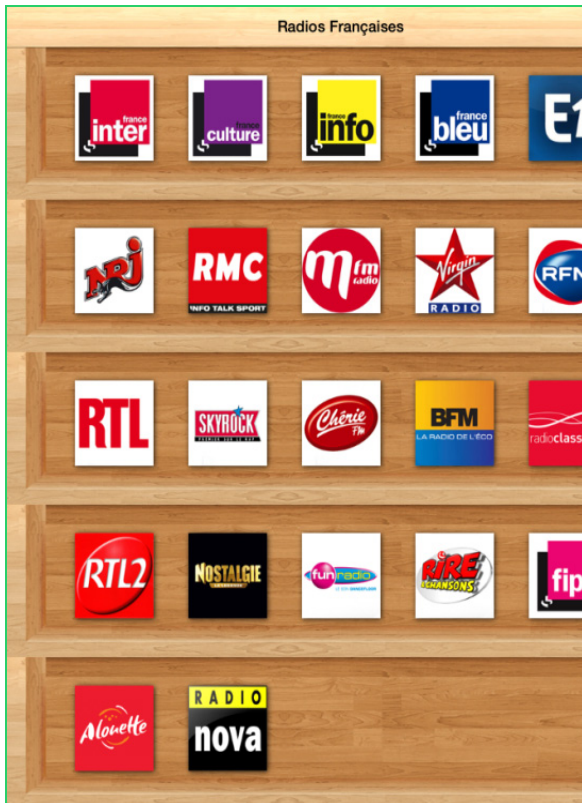
STREAMING ONLY

We have found only a few radio apps which offer basically the stream of one or more radio stations, but do not give any further information about the program, schedules or playlists. This basic version of a radio app runs in Algeria. The app of Radio Tunisia offers text news in addition to the wide range of live broadcasts. The large number of remaining apps analyzed provides a wide range of additional data.



NATIONAL RADIO PLAYER APPS

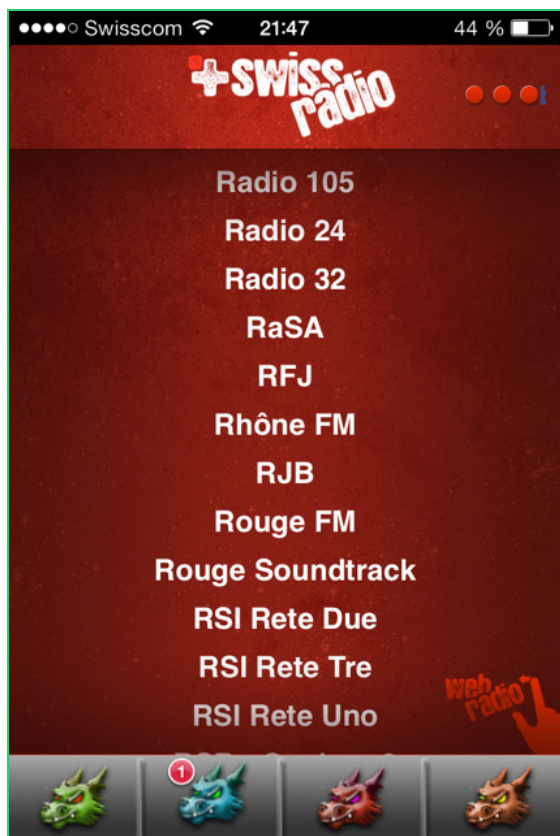
The quick and easy version of a national radio player app: collect and compile the largest possible number of stations (public and commercial) of one country, take their logos, connect it with the audio live stream of the shown station - and put them on a shelf:



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Slightly upgraded with additional metadata like title info and slides showing the CD cover of the song just playing are apps like this one from Switzerland: on the start screen appear in alphabetical order the different radio stations, commercial and public ones. As soon as one is selected, the station ID picture pops up, plus a small control centre to stop the live stream and to go back to the main menu, and - obviously important - the music title info including a direct link to the iTunes store.

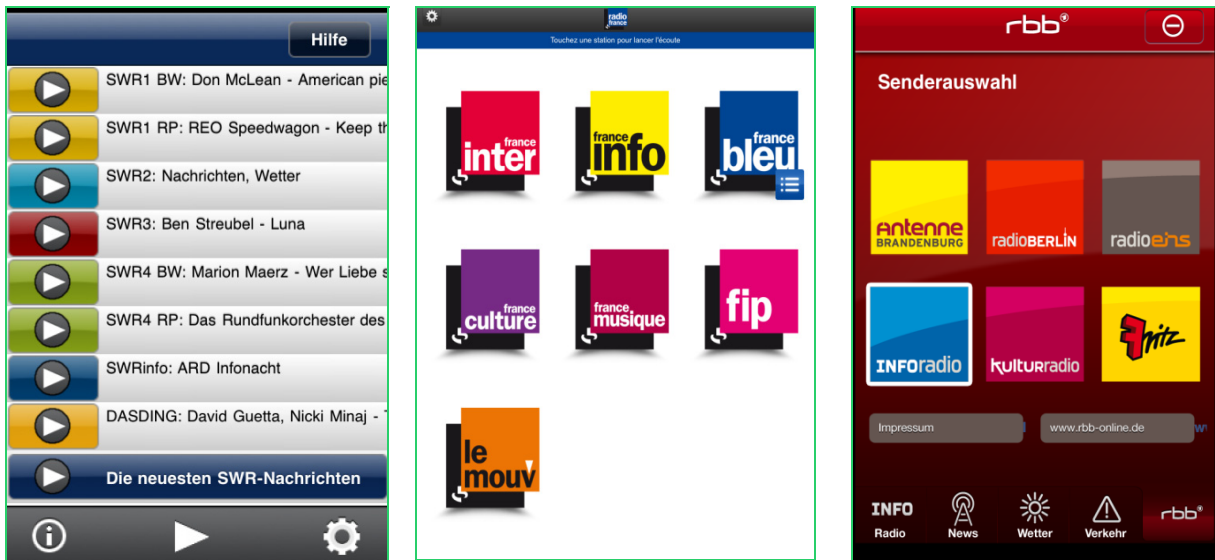


In addition to this, we witness a trend initiated by the UK Radioplayer: one app offers dozens of radio stations INCLUDING a wider selection of their main metadata, enabling stations to place advertisements as well in a pre-defined slot on the screen.



ONE BROADCASTER - MULTIPLE STATIONS

Because the brand of a broadcaster is normally well known within its transmission area, it makes sense to offer all the broadcaster's stations in one app. This we call the "horizontal" approach, enabling broadcasters to show the whole variety of their content bouquet in one view and serving mainly listeners who are interested in more than one specific station. It also helps broadcasters offer and promote content which otherwise would not have been recognized.



Some of these multiple station apps work with a main page showing the overview including the logos and / or names of the different programs / stations. A few, like the RBB Radio app, offer a direct link to the broadcaster's home page as well. Radio France recently updated its app and included a joggle tool for selection of the radio channels; the BBC radio app has a similar one. This gives the app a very modern look and feel. Furthermore the whole app was slimmed down to the basic functions in order to position the content in the foreground:

PLAY - DOWNLOAD - SHARE



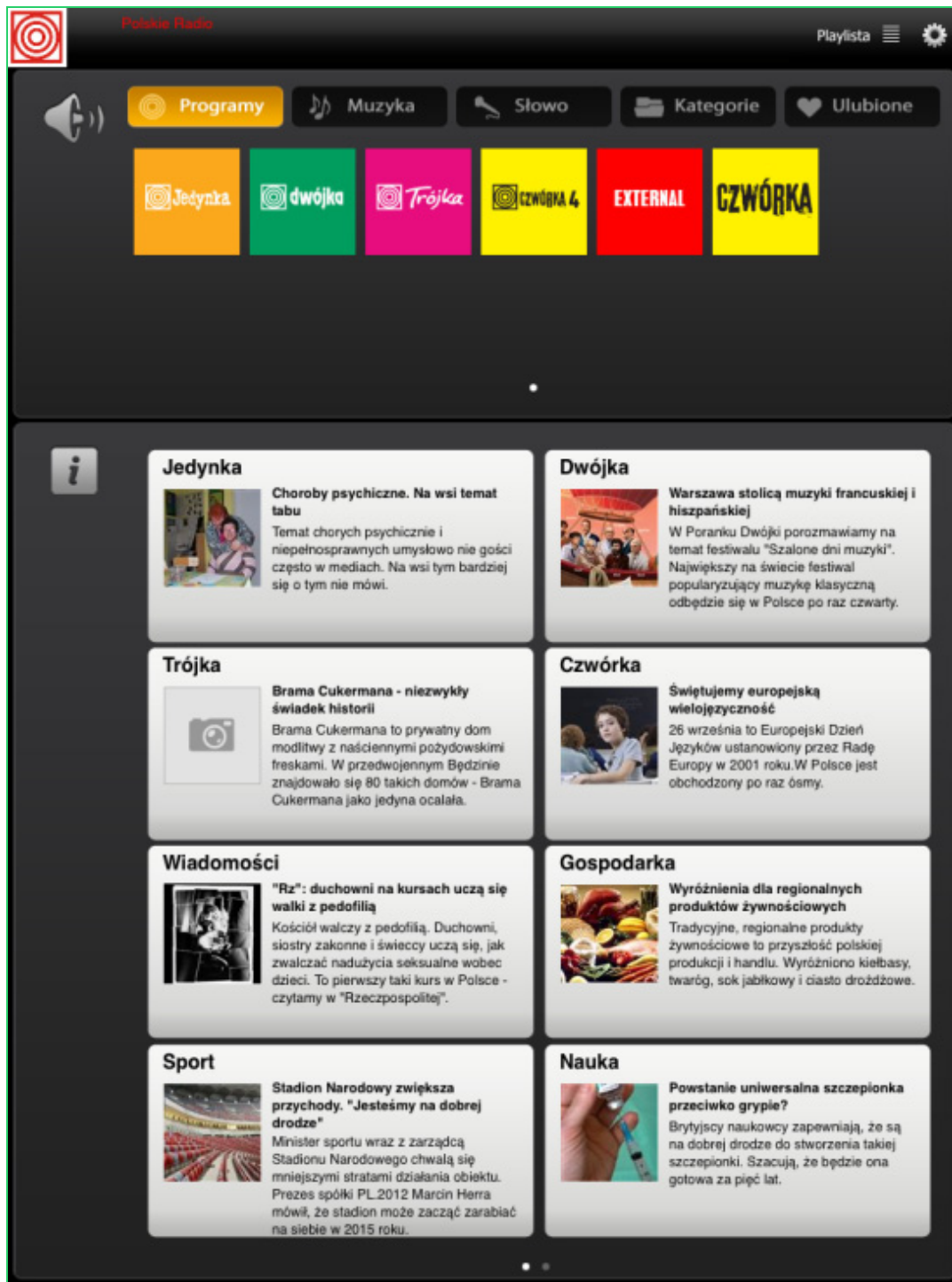
OLDER VERSION



NEW VERSION



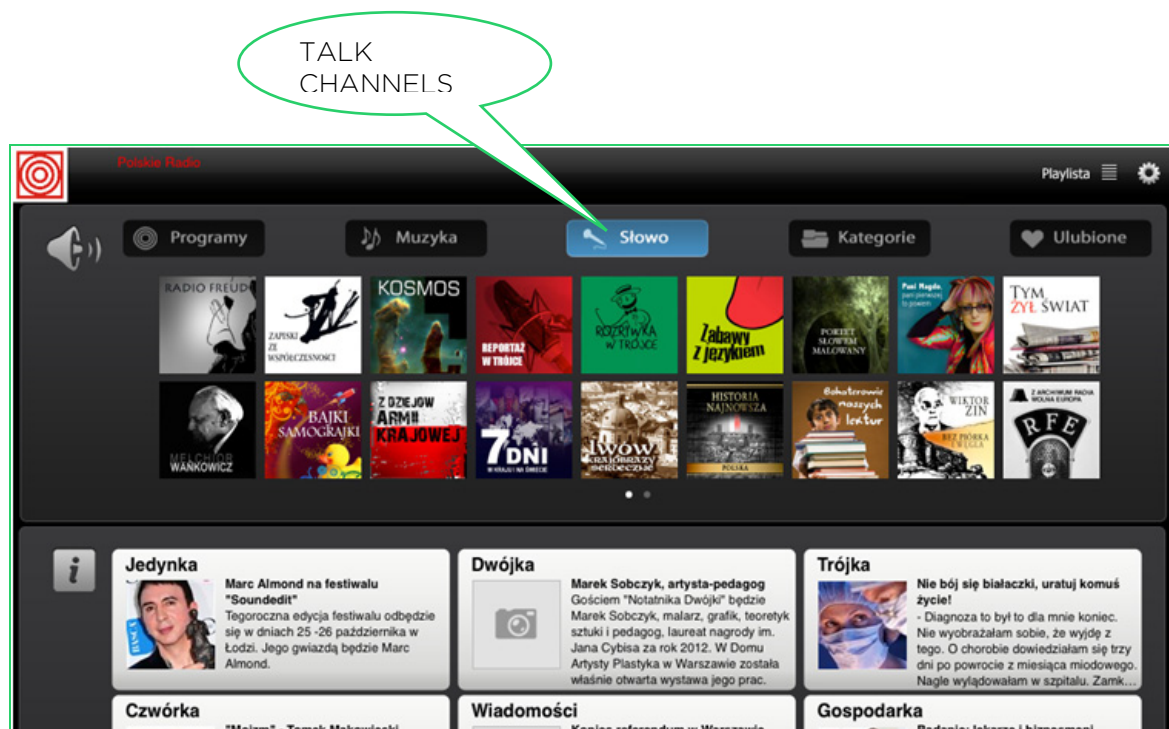
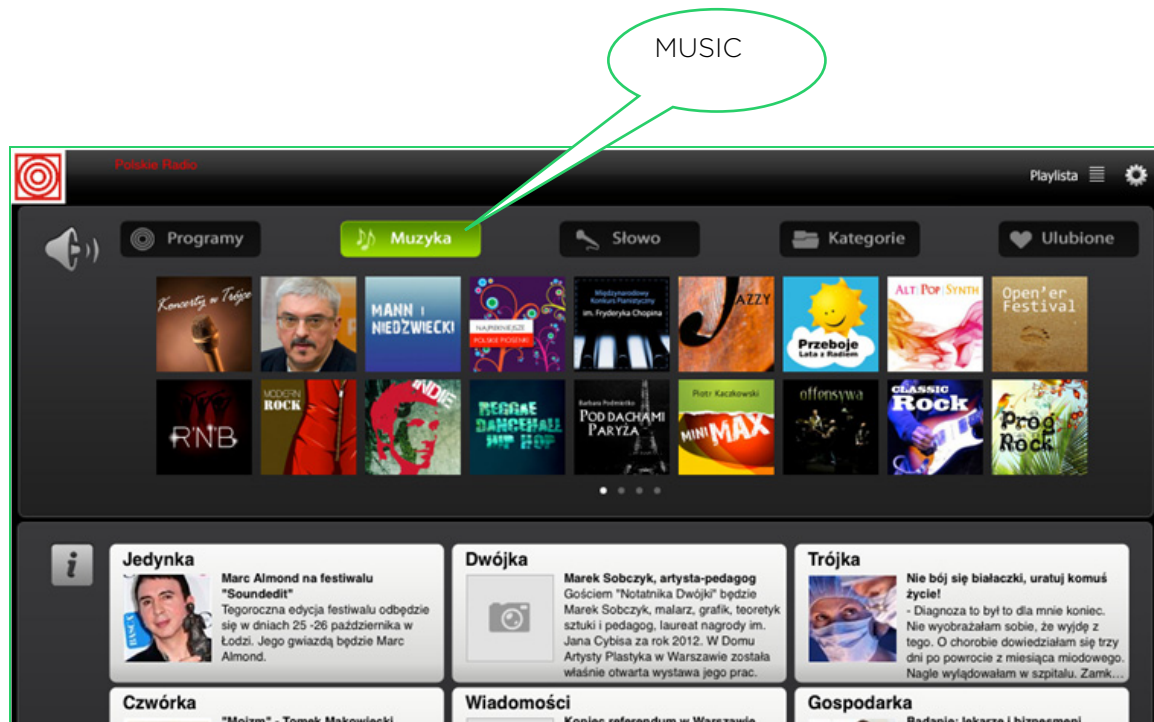
A singular combination between an overview of the six on-air stations offered and some podcast content is shown by the iPad app of Polskie Radio:



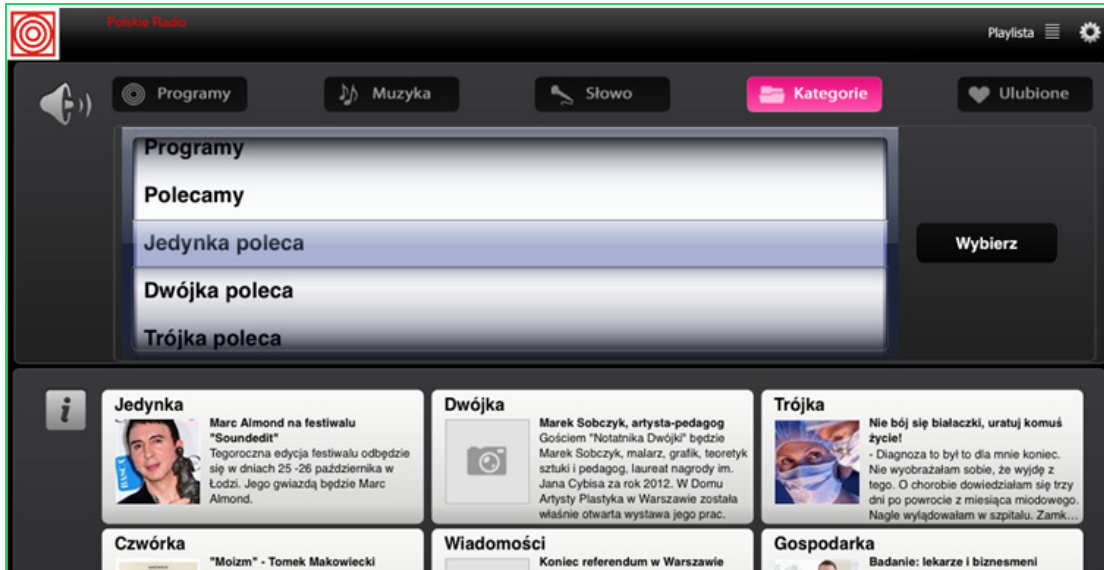
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Because Polskie Radio runs around 100 (!) additional channels on the Internet, the app also offers this choice, distinguishing between music and talk channels:



No doubt meant for the most advanced users, Polskie Radio has a function to categorize its content:



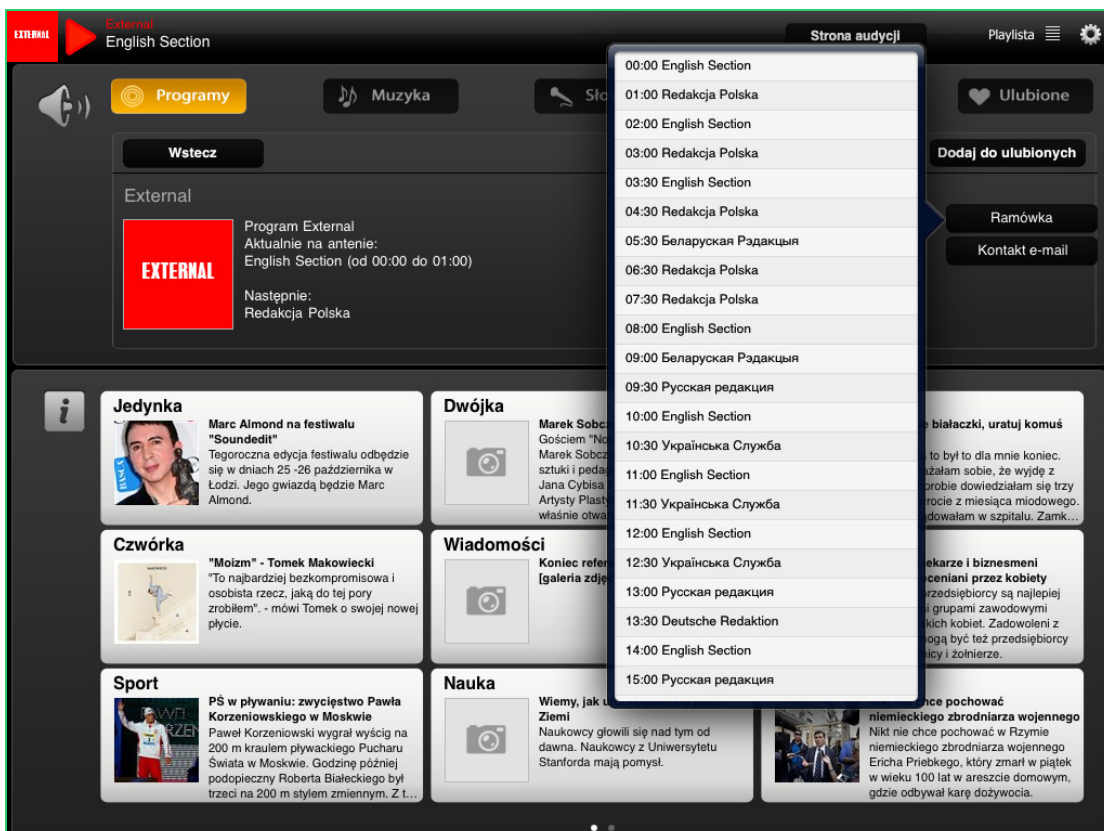
Categories are also used by RNE to structure the content offered:



Back to Polskie Radio and their youth station. Interestingly enough, the app opens immediately to a video player as soon as the youth station "Czwórka" is chosen and starts streaming the live program, which we can call "visual radio":



Electronic programme guide (EPG) information is also offered via the Polskie Radio app, quite unusually as a drop-down menu after the listener has chosen one of the stations:



Yet the short headline / name of show is only the gateway to more information. Touching a show's name opens up a complete new cosmos of data: texts, pictures, even a YouTube-embedded video of the artist and, of course, the option to share this content with friends on a social network.

The screenshot displays the EURORADIO website interface. At the top, there is a navigation bar with the logo 'Dwójka Fantazja polska', a 'Strona audycji' button, and a 'Playlist' menu. Below the navigation bar, there are buttons for 'Wróć', 'Cztery struny świata', 'poleć na facebooka', and 'opis audycji'. The main content area features a headline 'Głosu tego barda nie sposób zapomnieć' followed by a sub-headline: 'Koncertował z Kurtem Cobainem i Stingiem, uczył śpiewu Nicole Kidman. Tim Eriksen to śpiewak, instrumentalista, kompozytor i poeta o ogromnej charyzmie i wiedzy. Bard z Massachusetts zawitał osobiście do studia Dwójki.' To the left of the main text is a photo of Tim Eriksen playing a violin. To the right is a paragraph of text describing his music and background. Below the text is a YouTube video player showing 'Tim Eriksen: Wayfaring Stranger'. At the bottom of the page, there is a section with two columns of related content, each with a small image and a short text snippet.

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A clear difference in layout is shown by Catalunya Ràdio when one compares the broadcaster's iPhone and iPad app. According to the small screen of the smartphone, the choice of programs is clearly reduced, whereas the bigger screen of the tablet app offers the listener a direct connection to different channels.

IPHONE



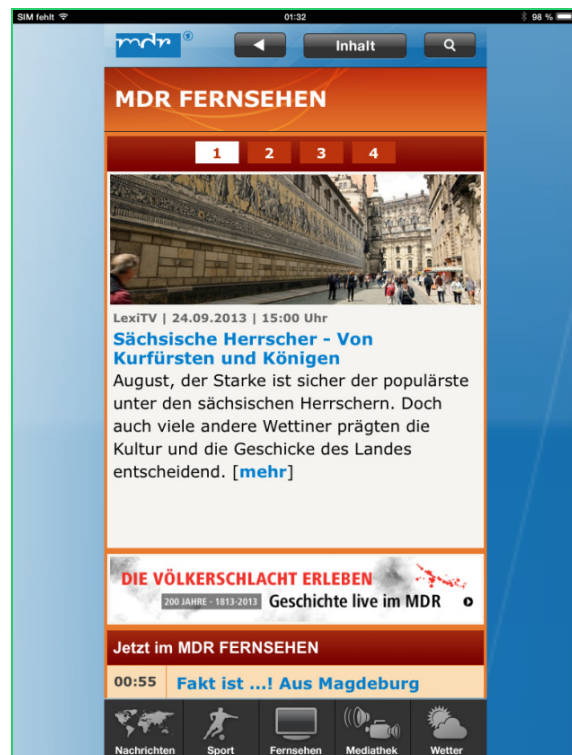
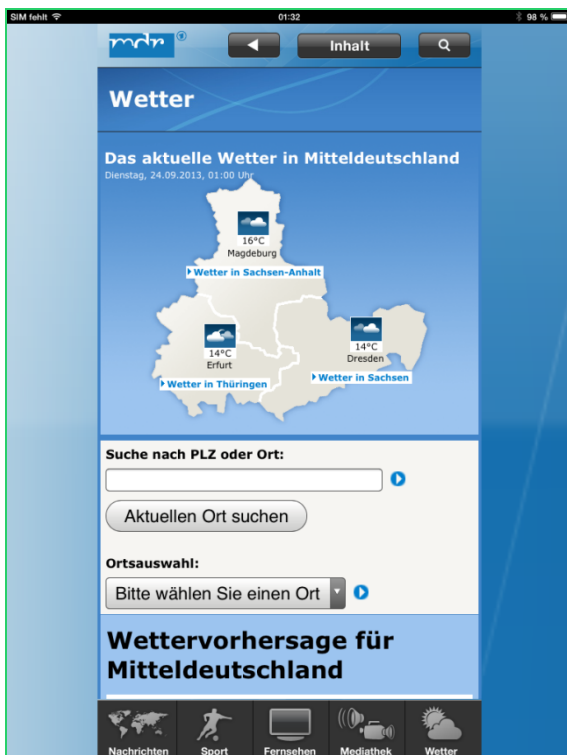
IPAD



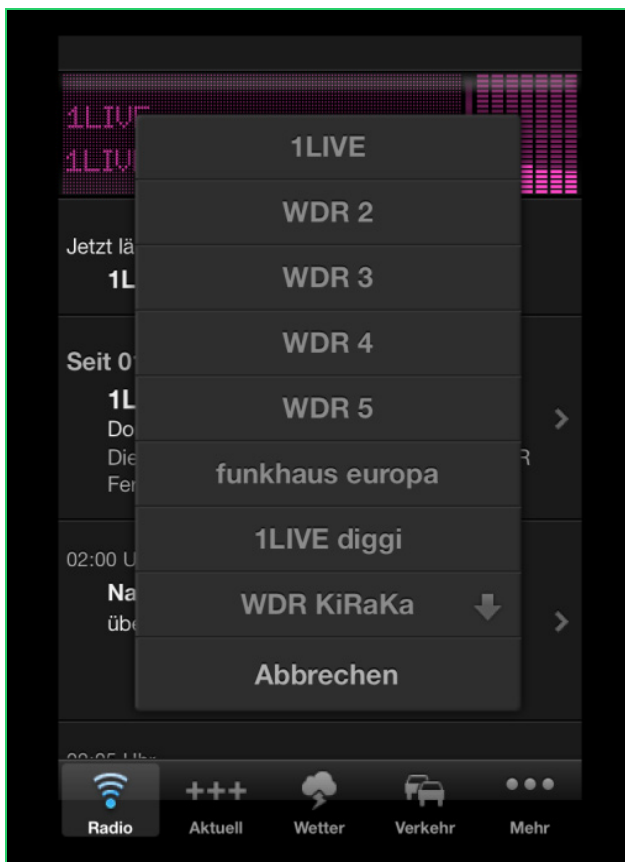
Both of them offer a direct link to the related Catalunya TV app, which is a very rare feature in radio apps. We have seen it with the RTVE app as well, having radio AND TV programs together on the start screen as an "à la carte" menu:



The only ARD app where we have seen a switchover from Radio to TV is the MDR radio app:



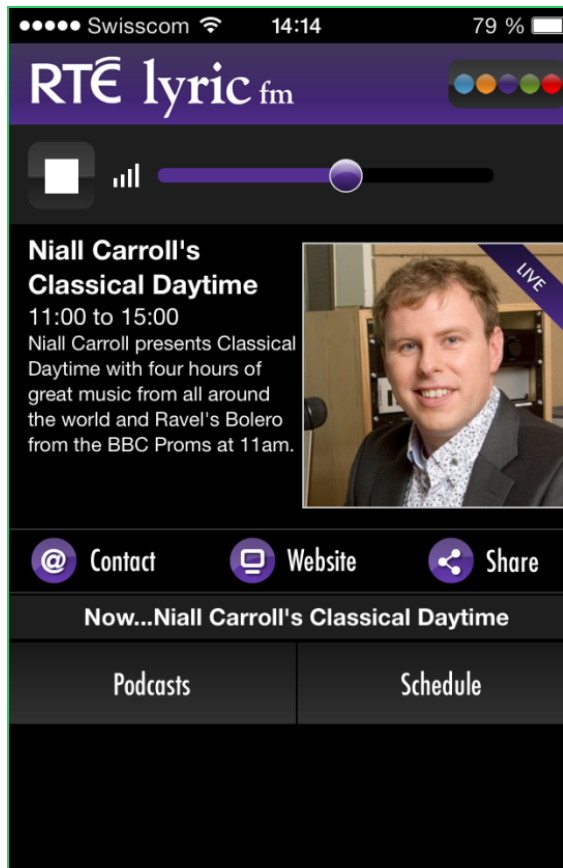
Other "one broadcaster/multiple stations" apps guide their users with a drop-down menu from station to station. However in the WDR Radio app, you have to know where to touch the screen (in the audio chart):



More visible is the "change the station" function on the RTÉ radio app: small coloured buttons in the top right corner of the screen signal this option. As soon as you touch them, the third general option on how to navigate within an app appears: swiping.

SWIPING

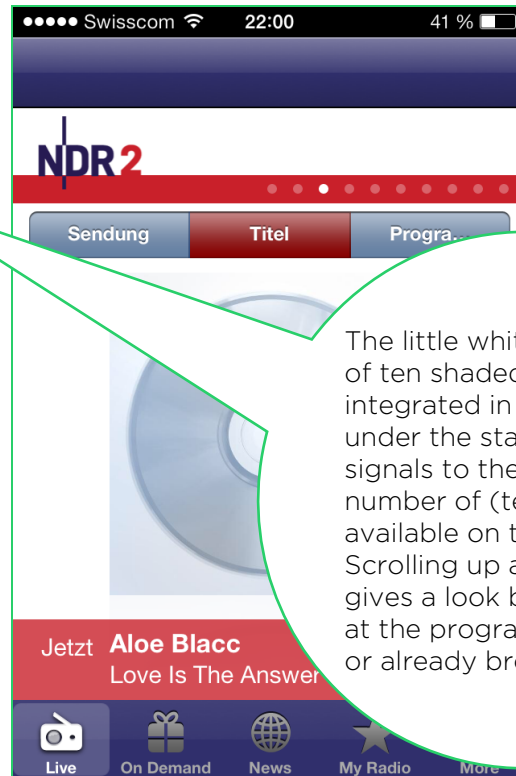
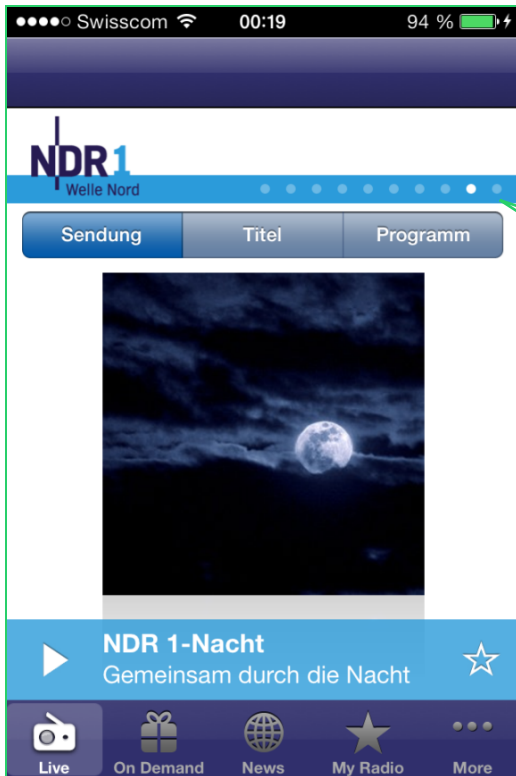
From right to left and vice versa in order to change the station, this movement is well adapted to smartphone users. RTÉ presents a little add-on, which is live information displaying what is "Now on RTÉ..." for each selected station.



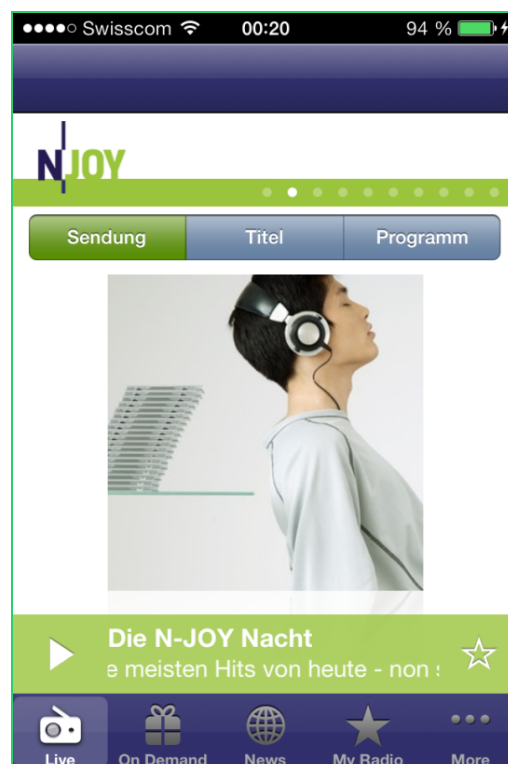
EUR(O)RADIO

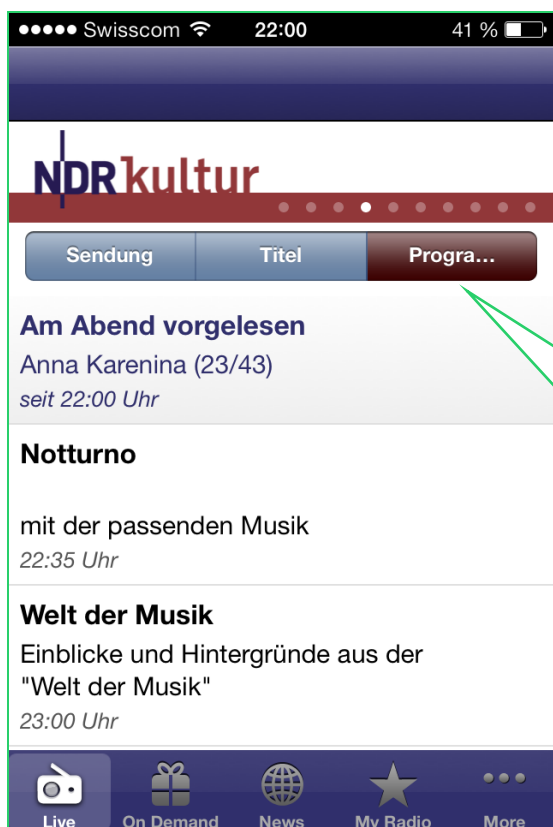
OPERATED BY EBU

There is the same swipe mechanism with the NDR radio app. A little white dot in the coloured line under the station's name signals more available programs. Additionally three main folders present standardized information: name of the current broadcast (Sendung), name of the artist and title of song (Titel) including a picture of the CD cover if available, and the current electronic program guide (Programm).



The little white dot in a row of ten shaded dots integrated in the baseline under the station's name signals to the user the total number of (ten) stations available on this app. Scrolling up and down gives a look back and forth at the program scheduled or already broadcast.



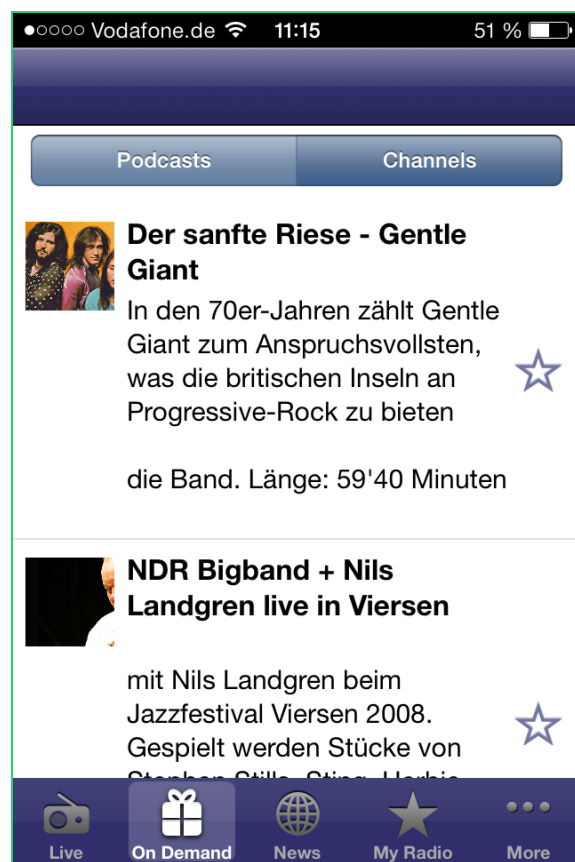


Because the station "NDRinfo" (in yellow) has no music - it is an all-news channel - the app provides the current broadcast ("Sendung") and the EPG ("Programm") only.



BOTTOM NAVIGATION 1

A popular tool to give consumers further information is a navigation bar at the bottom of the screen. Like many other radio apps, the NDR radio app offers a switch between the live stream of the station, podcasts and current news. In addition to "Live", "On Demand" and "News", users can choose and store their individual selection of program via a button called "My Radio"; the same navigation appears, of course, on every NDR station in the app. Interestingly, the "On Demand" button offers "Podcasts" and "Channels" although the distinction does not seem quite clear (podcasts seem to be shorter program items like 2-minute comedies or commentaries, while channels are whole shows, mainly music programs). Both of them - podcasts and channels - can be tagged/marked with a star on their right side and appear then as favourites in "My Radio".



The "News" button gives a triple view: current weather information, nicely enhanced with coloured icons; traffic information (divided into highways, national roads and "other"); and text news with headlines and the option to open the more elaborate news text. It is not known how often these special features are called up by users of the NDR Radio app, especially since the rise of popular weather apps, often pre-installed in smartphones, and the popularity of navigation apps (and stand-alone navigation devices) make it uncertain if this special offer by broadcasters still meets audience demands.

(See p.6: Measurement challenges)

TRIPLE SELECTION IN "NEWS"



DETAILED WEATHER: TWO DAYS FORECAST, MINIMUM AND MAXIMUM TEMPERATURE, RAINFALL PROBABILITY



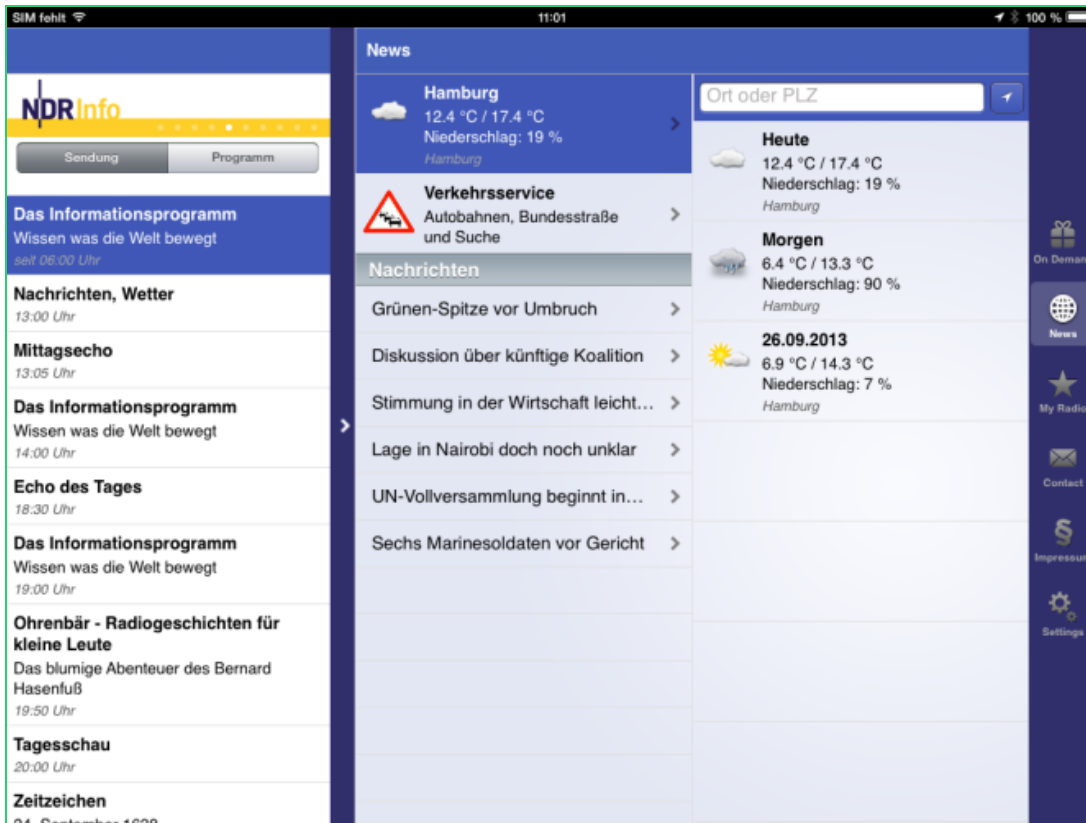
DETAILED TRAFFIC NEWS



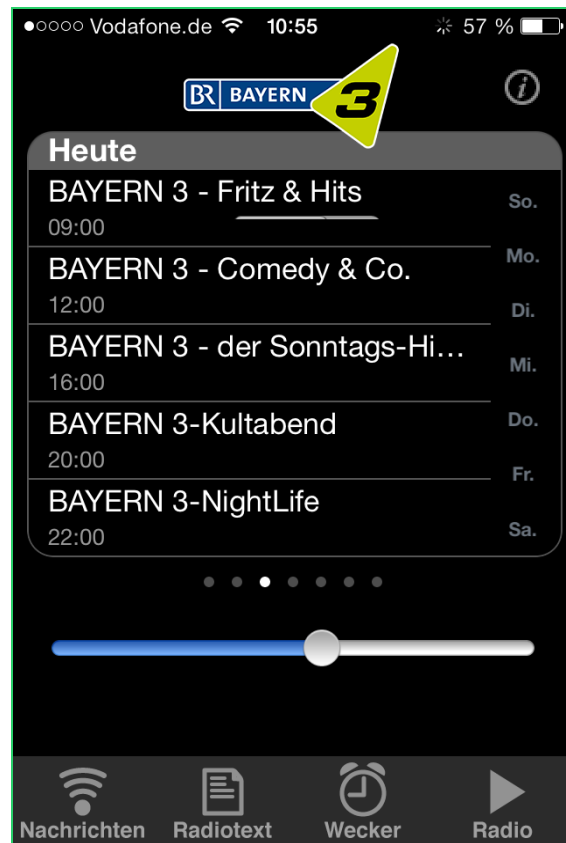
EXTENDED NEWS TEXT



Just to compare: the iPad version of the NDR Radio app works with three columns, displaying a variety of different information from EPG to news and weather:



Swiping is also a matter of choice with the BR radio app. Today's program ("Heute") appears automatically:



Swiping is also a matter of choice with the BR radio app. Today's program ("Heute") appears automatically:



Touching on the title of a show makes the screen page turn and display more information on the specific program: category, start time and duration of show, name of presenter.



Often swiping seems to be the choice for iPad apps. As we see with RNE, the screen is divided into two, and while in the top section the recommended programs can be swiped, there is a filtered content feature at the bottom, allowing users to choose a category and then swipe to search.



BOTTOM NAVIGATION 2

At the bottom of all BR radio app screens, there are four basic functions: news, RDS radio text, an alarm clock and the listen-to-live radio button.



The button "Nachrichten" (news) immediately launches the latest news bulletin, a pre-configured podcast. The RDS radio text feature in particular seems to be an add-on which comes out of the "old" analogue world and does not give app users a terribly big benefit. For example, the text (as displayed) is "You are listening to the 10 o'clock news" while one is in fact listening to precisely this news bulletin which starts with the sentence "It's 10 o'clock, here is the news...". Could a listener really forget after two minutes that this is the 10 o'clock news? A more web3.0-like function would have been to integrate at the bottom a share function in order to tell friends on social networks or via an e-mail what one is interested in.

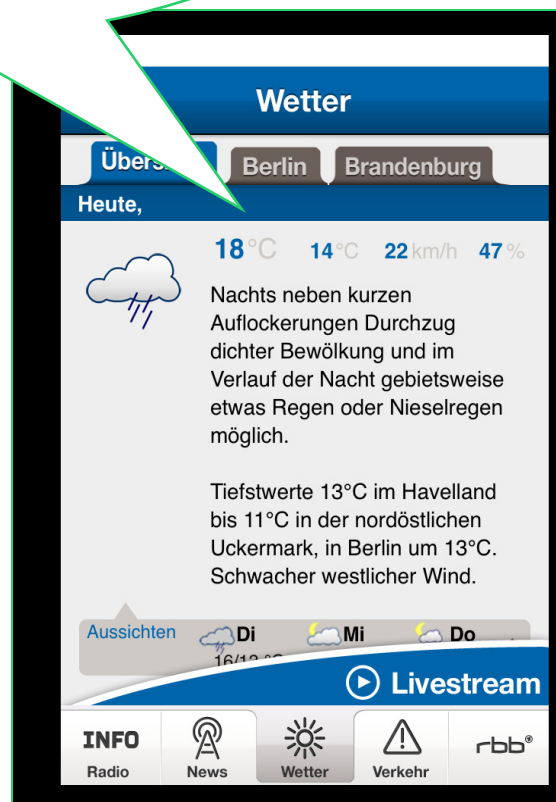


A slightly different bottom navigation uses the RBB Radio app:

The first button shows the name of the current selected station, followed by news, weather and traffic. The last button at the right is the back button to go to the overview menu.

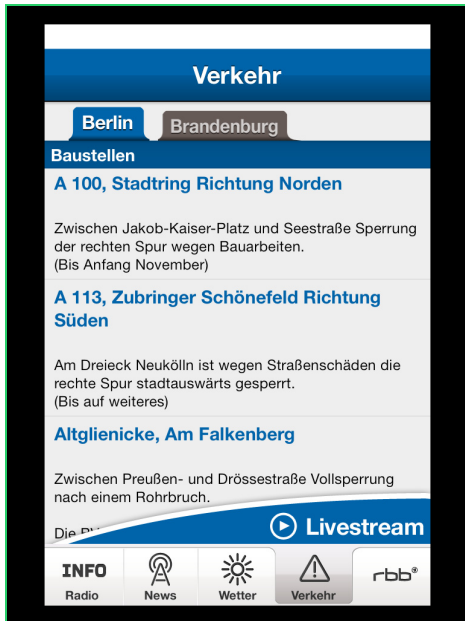


"News" offers attractive items with a picture, headline and short text. "Weather" can be filtered by region and indicates along with the high/low temperatures the current wind speed and percentage of humidity.

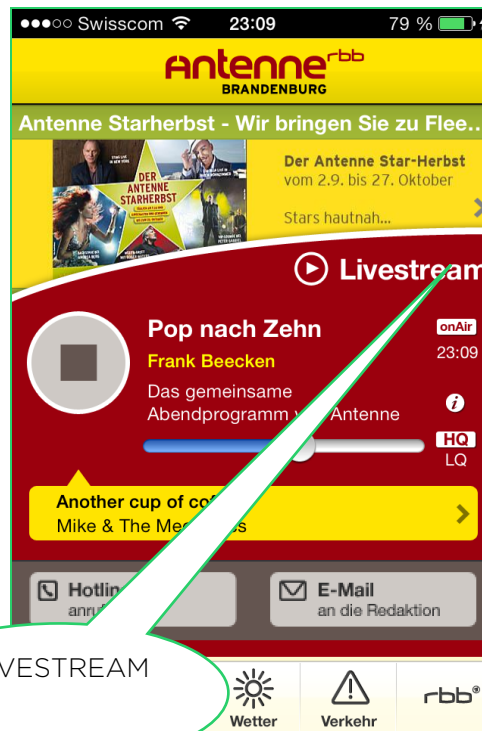
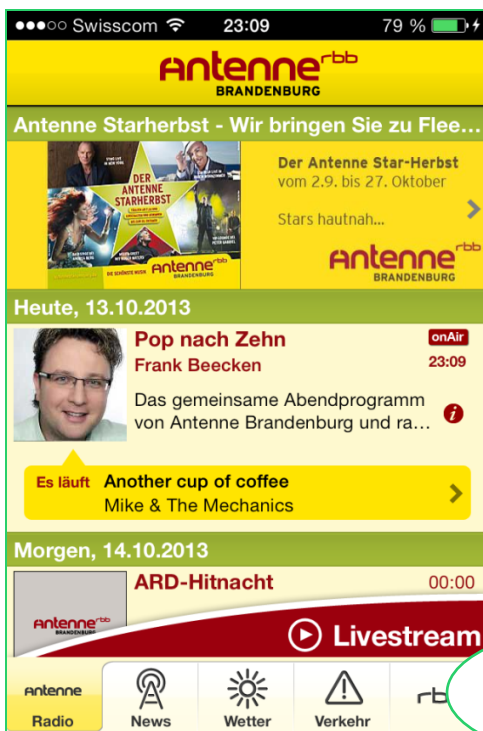


"Traffic" also has a filter, enabling users to select traffic information from the two provinces RBB covers. But the most interesting feature is a pop-up window which rolls up half the screen as soon as one touches / starts the live stream (see screenshots below in yellow and red). Not only the name of the show and presenter is shown but also the title of the song played, including the option to chose between high and low audio quality. Additionally the listener can call the station's hotline and/or send an e-mail directly to the editorial staff of the program. A connection to social networks is not provided.

TRAFFIC NEWS



LIVE STREAM POP-UP

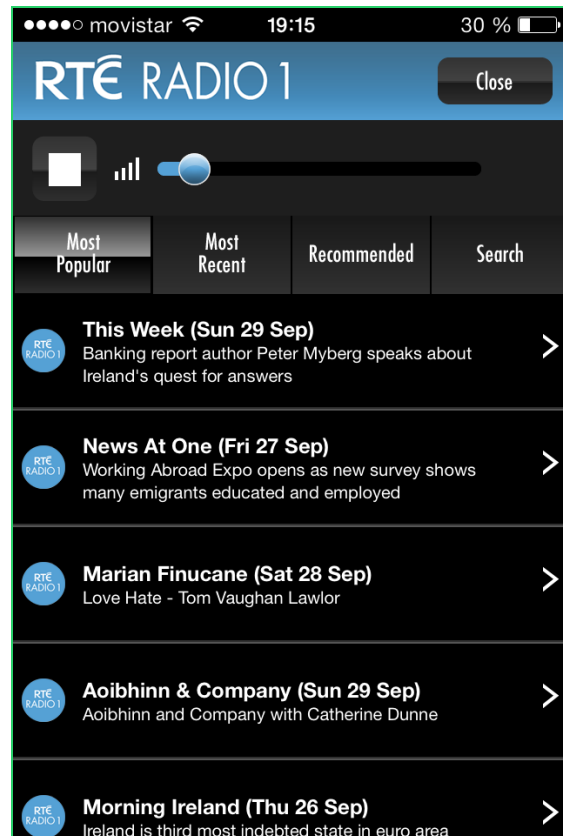


LIVESTREAM

The "connected" features, for instance, are provided by the RTÉ Radio app:



Contact the station via e-mail, have a look on the website of the program or share your current choice of radio listening with friends.



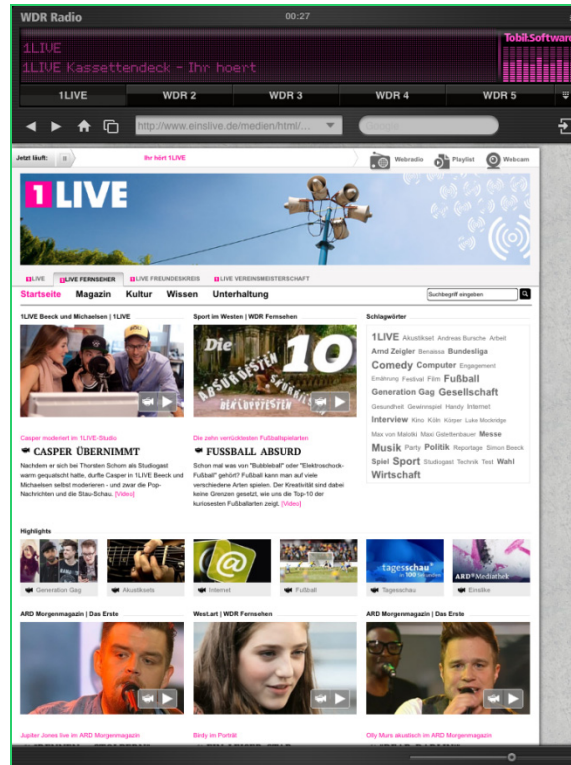
RTÉ adds another function mostly known by video platforms on the web: filtering among "most popular", "most recent" and "recommended"; the app also offers a search in the podcasts.

Some apps even open the station's website as a framed version and enable users to watch videos which are embedded there:

WDR iPHONE APP



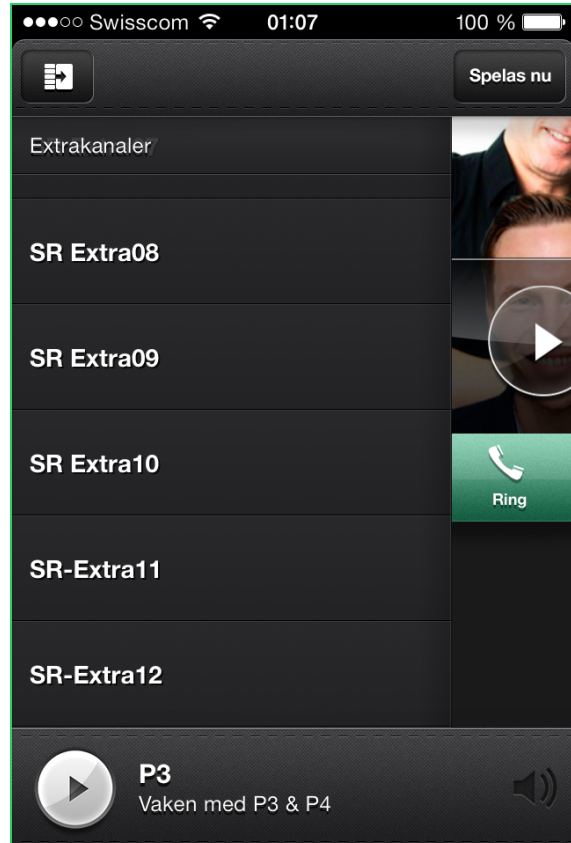
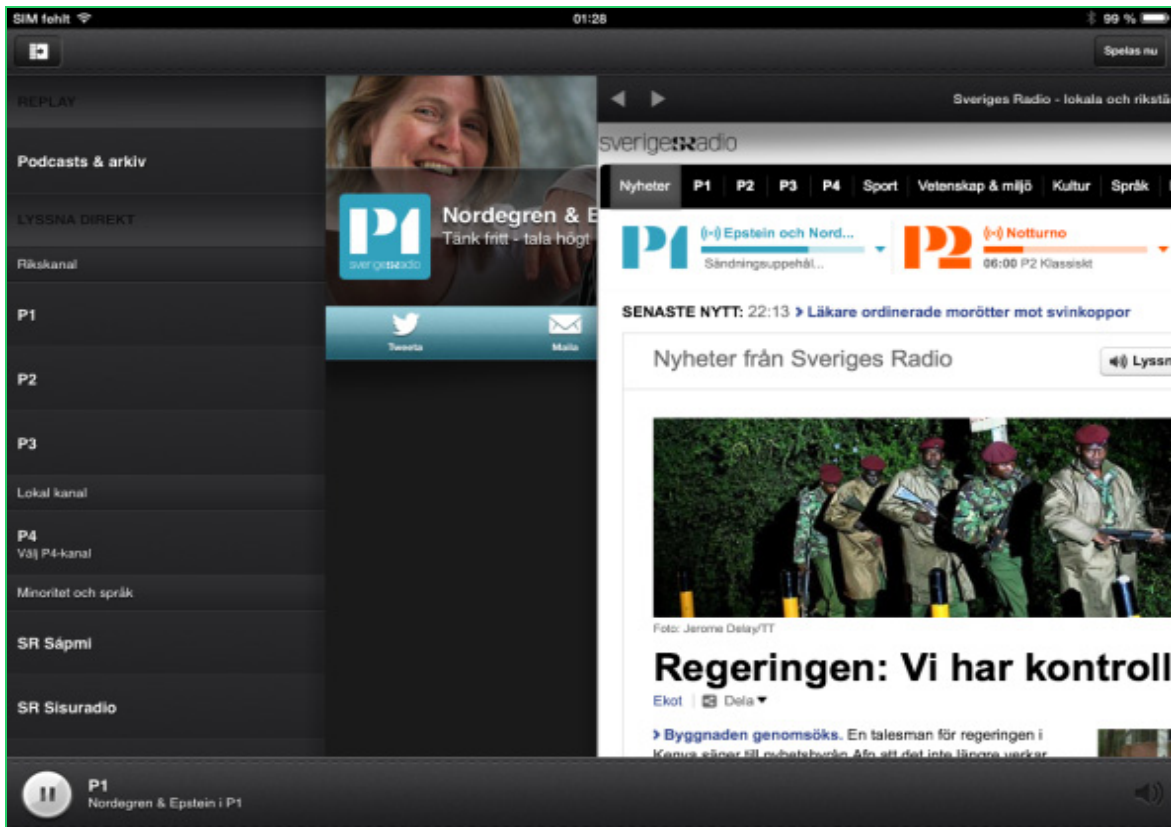
WDR iPAD APP



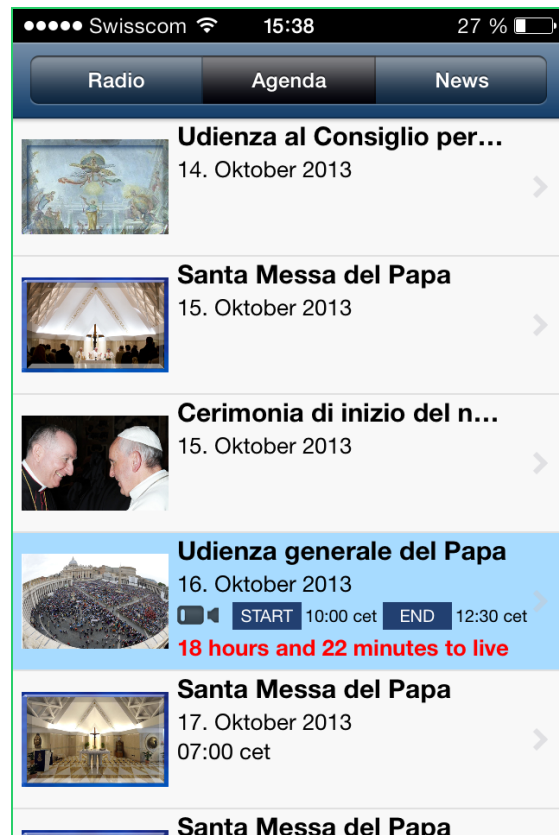
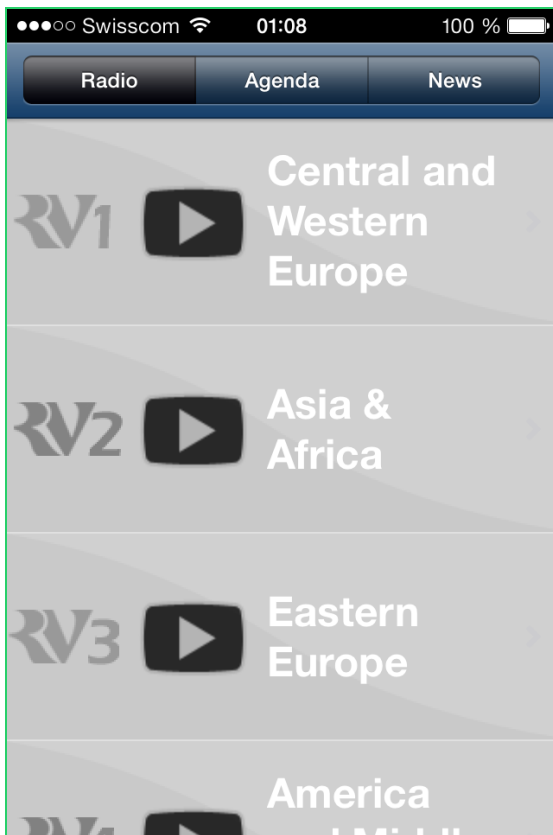
We found a swipe-in option for the content menu with only one app: Swedish Radio SR offers a long selection of channels and other extras to be scrolled down on the left side of the app as soon as the menu bar is swiped in from the side. SR's iPad app adds a third vertical column to the screen showing the content menu, the chosen station and the current program. The bottom navigation concentrates on connecting the audience via social networks, short messages or e-mails and even via the good old telephone.

EUR(O)RADIO

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A mix between classic navigation and scrolling on an overview page is shown by Vatican Radio. Their radio programs / stations are sorted by geographical borders (a map would have been a nice feature too). The EPG program even offers a countdown to the next audience with the Pope, which will then be delivered as a live video stream.



Being modern in its direct-to-radio related functions, even with an option to show live videos, the Vatican Radio app also delivers an EPG which is merely a word document listing the program schedule. This feature is maybe a bit difficult to read for users.

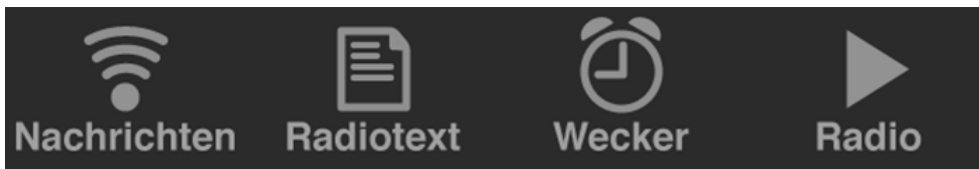
Programmes to Central and Western Europe

Consult the page: [General Informations for the frequencies in S.W., M.W. and for the Rome area in FM](#)

Weekdays		
UTC		PROGRAMMES
CET	UTC	
01.00	00.00	News in Italian
01.30	00.30	Portuguese Brazil
02.00	01.00	Spanish Latin America
02.45	01.45	Spanish Latin America
04.30	03.30	Slovene
04.50	03.50	Croatian
05.10	04.10	Czech
05.25	04.25	Slovak
05.40	04.40	Hungarian
06.00	05.00	Polish
06.20	05.20	German
06.40	05.40	French
07.00	06.00	English
07.30	06.30	Holy Mass in latin
08.00	07.00	News in Italian
08.15	07.15	World news in French
08.30	07.30	World news in English
08.45	07.45	Arabic
09.05	08.05	One-O-Five Live
10.00	09.00	Flash news in Italian
10.03	09.03	One-O-Five
10.15	09.15	Holy Father's General Audience (Wednesday)
11.00	10.00	Flash News in English (except Wednesday)
11.03	10.03	One-O-Five (except Wednesday)
11.30	10.30	Music Latin America (Mon. and Fri.Sat.)
11.30	10.30	Hola mi gente (Tuesday and Thursday)
12.00	11.00	Portuguese Brazil
12.15	11.15	Brasilian Music
12.30	11.30	Italian: Anthology (Monday,Wednesday and Friday)
12.30	11.30	Italian: Orizzonti Cristiani (Tuesday, Thursday and Saturday)
13.00	12.00	Portuguese Brazil
13.30	12.30	Spanish to Latin America
14.00	13.00	World news in Italian
14.30	13.30	Crocevia della Bellezza (Saturday)
14.30	13.30	Italian: Orizzonti Cristiani
15.00	14.00	News in Spanish
15.15	14.15	News in Portuguese
15.30	14.30	Italian: Anthology
16.00	15.00	News in German
16.15	15.15	News in Polish
16.30	15.30	Music
16.30	15.30	Italian: Incontro della Serenità (Friday)
17.00	16.00	Vespres in Latin
17.30	16.30	Italian: Orizzonti Cristiani
18.00	17.00	News in French
18.15	17.15	News in English
18.30	17.30	Slovenian
18.50	17.50	Croatian
19.10	18.10	Hungarian
19.30	18.30	Czech
19.45	18.45	Slovak
20.00	19.00	Polish
20.20	19.20	German
20.40	19.40	Rosary in Latin
20.40	19.40	Rosary in Latin (First Saturday of month)
21.00	20.00	News in Italian
21.10	20.10	News in Italian (First Saturday of month)

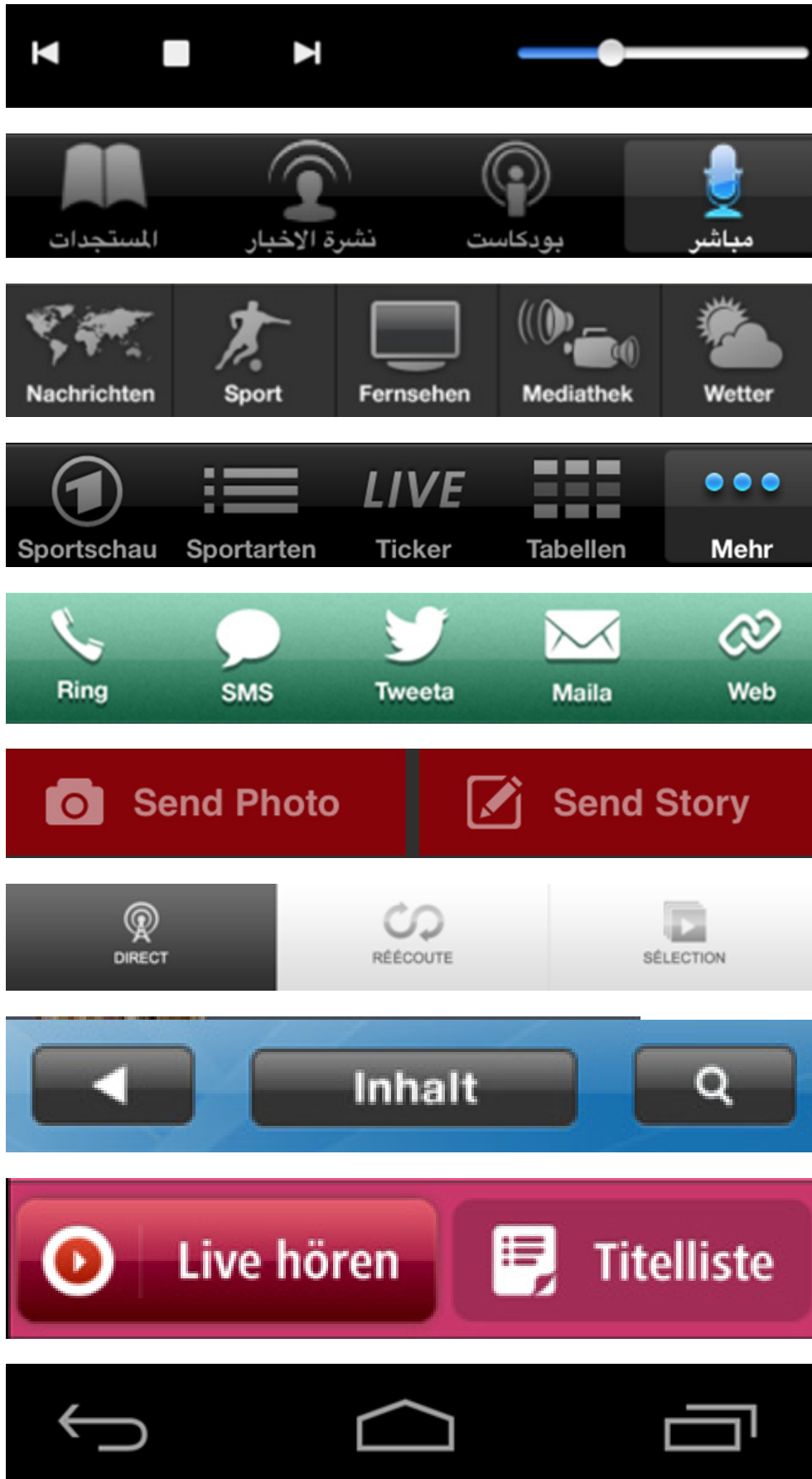
BOTTOM NAVIGATION - SUMMARY

Below we have listed a selection of different navigation icons which appear mainly at the bottom of the apps. They show the huge variety of functions which seem important to broadcasters.



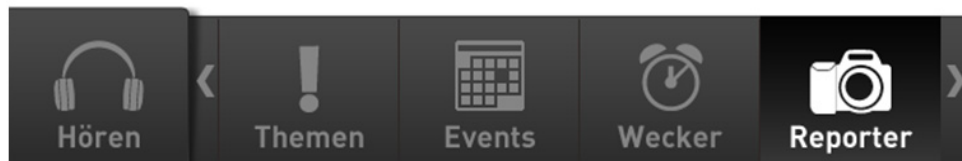
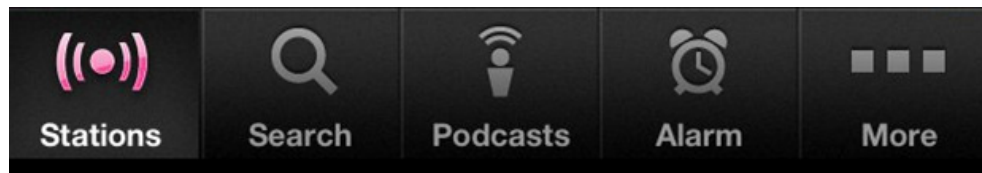
EUR(O)RADIO

OPERATED BY EBU



EUR(O)RADIO

OPERATED BY EBU



No navigation but a clear corporate identity banner:



Europe1 is the only app found to offer a link to Google+ - next to other social networks:



START SCREEN

Another interesting difference between apps is which screen you see when you start the app. Most of the apps open with a sort of home page, which is - if available - the overview of all the stations offered. Other apps know which station / page was opened when the app was used before - and reopen this view again.

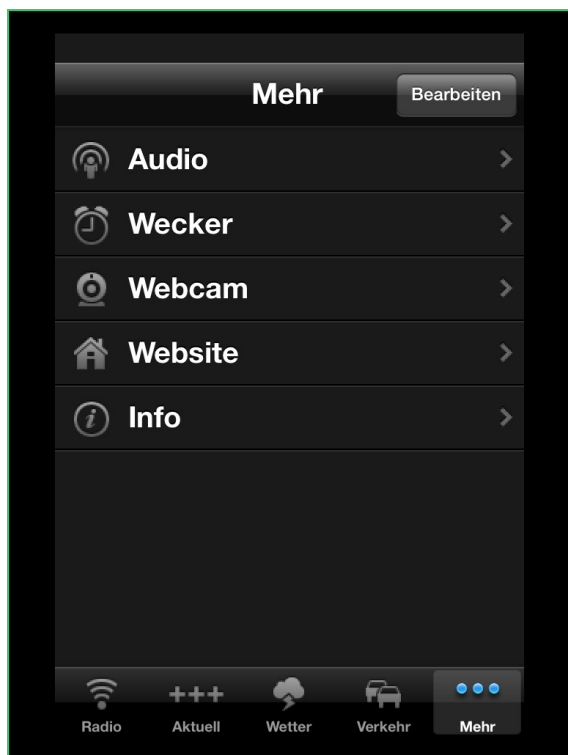
Sometimes apps begin by immediately playing the live stream; and more often the live stream does not stop playing when one leaves the app, which could sometimes be unpleasant. Only if another media app is started does the live player stop.

Instead of wiping pages or opening a drop-down menu the BBC radio app offers the station selection via a joggle wheel. And if you listen to any audio, the screen looks very tidy with a photo in the centre and the play button at the bottom:

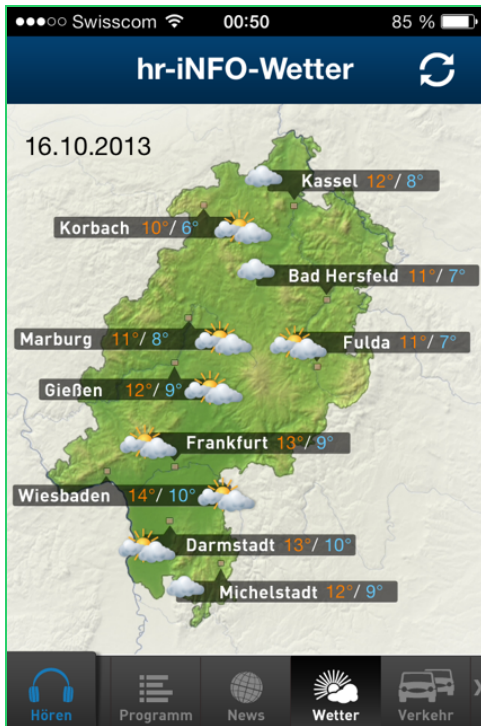


SINGLE FEATURES

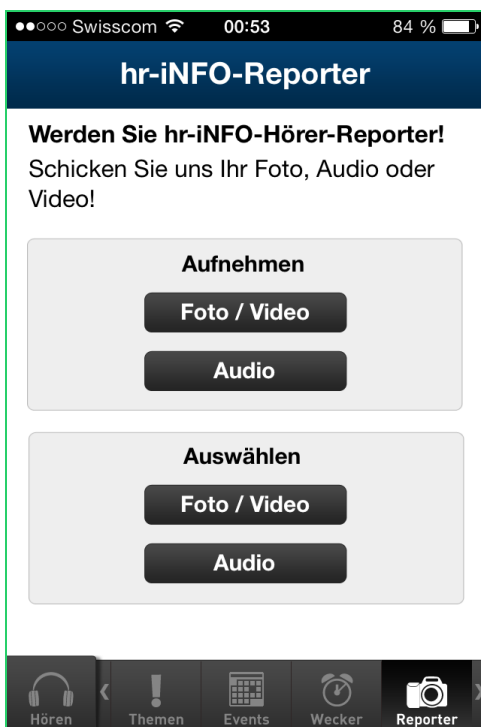
Some special features appear rarely, for instance, a link to webcam(s) of the broadcaster, as offered by WDR. Normally German public service broadcasters publish their program in their state or region only. The exception is a table with traffic information throughout the country, pre-selected according to the state or region.



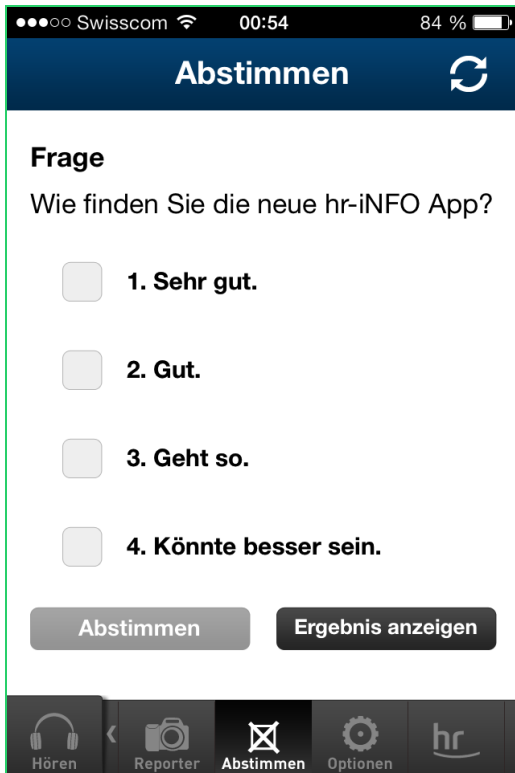
Despite special weather apps on the market, the regional weather seems to be an important feature especially for German broadcasters, and as the HR radio app shows, it can be displayed quite attractively.



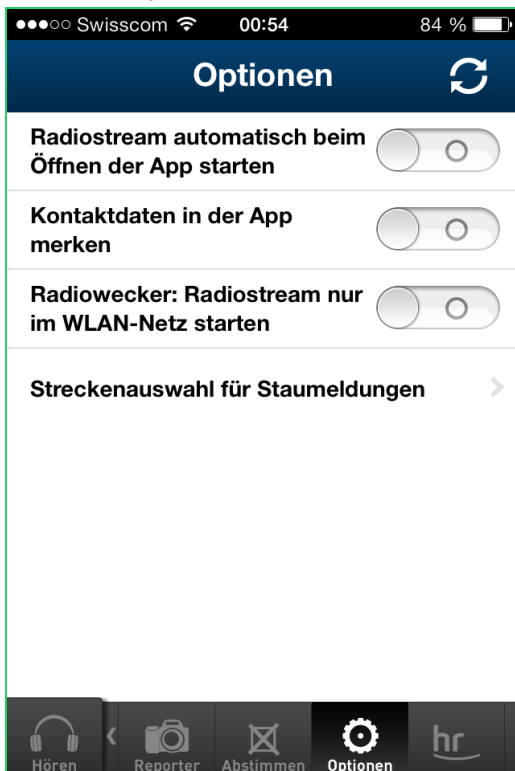
The other special feature offered by HR only as part of a radio app is a recording tool for user-generated content: pictures, videos and audio files can be sent directly to the station.



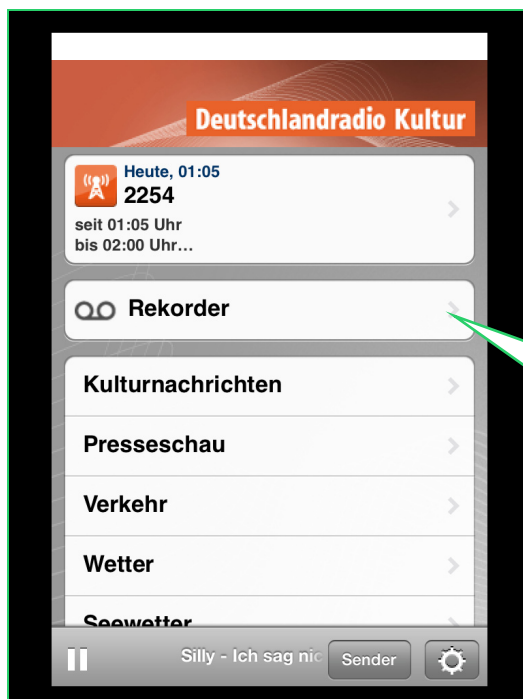
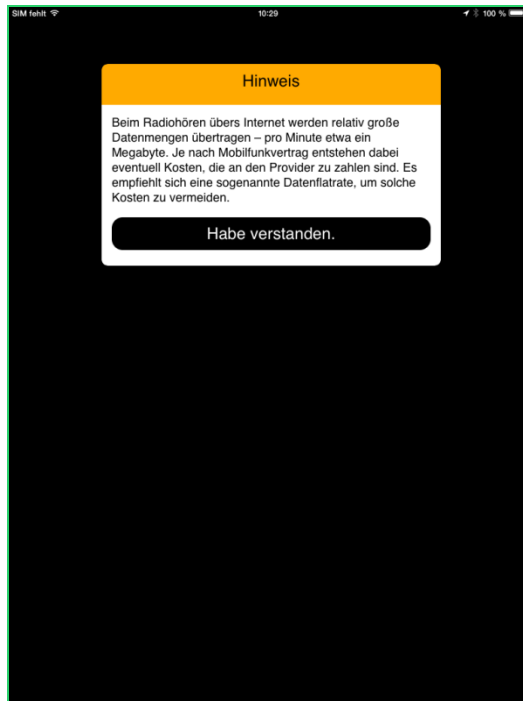
A special in-built voting tool we found only once (HR Radio app). It seems this function can be used for any voting purpose the editors might think of.



Also the button "options" does refer to the known and fairly sensible cost situation live radio streamed via apps is facing today: therefore the user can decide by himself if this streaming app shall start in any case immediately after opening the app or only if the mobile device is logged-in in a Wifi network. Both options give the user the opportunity to save money.



SWR (ARD, Germany) informs users on possible additional costs if the app is used outside a Wi-Fi area ("Hinweis"). So no listener should complain afterwards because it's up to them to react.



Quite singular in the world of apps: Deutschlandradio offers a "Rekorder" tool to enable listeners to "tape" (record) all the content which they are interested in.

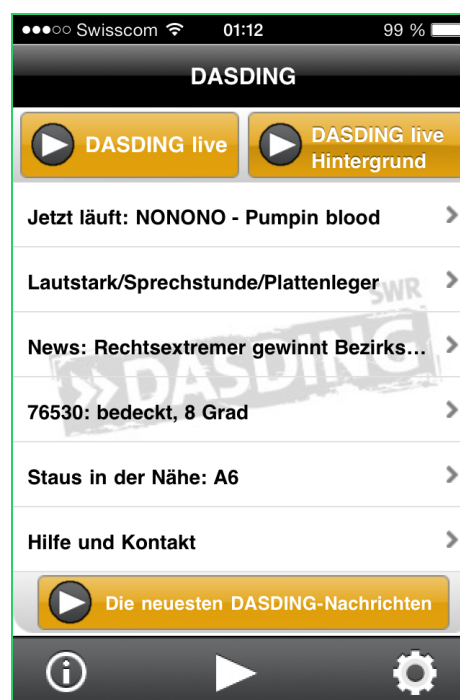
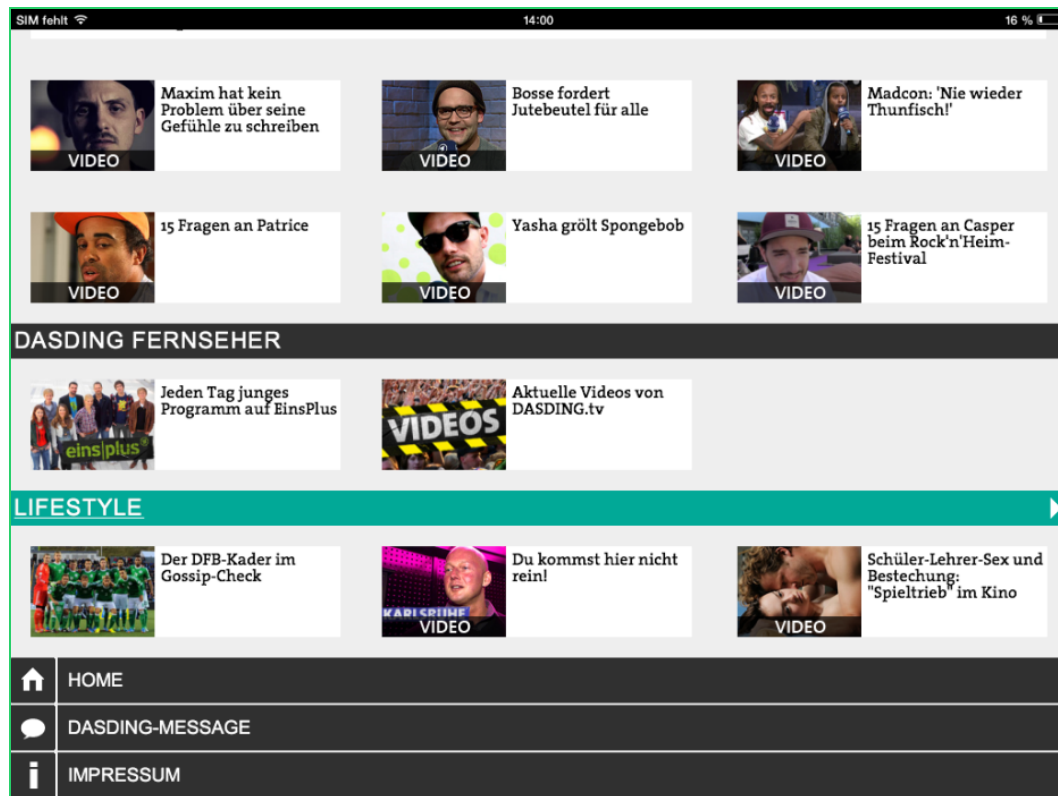


As a special feature, the MDR radio app (ARD, Germany) has a button which opens directly the MDR "Mediathek", the broadcaster's online video and audio .portal, offering epg data, live streams and podcasts.content. BBC News does not have any user comments at all.

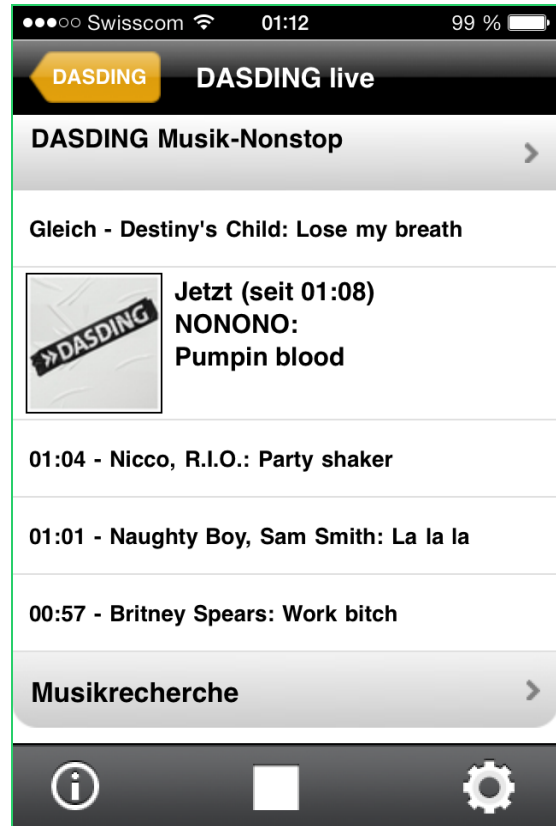
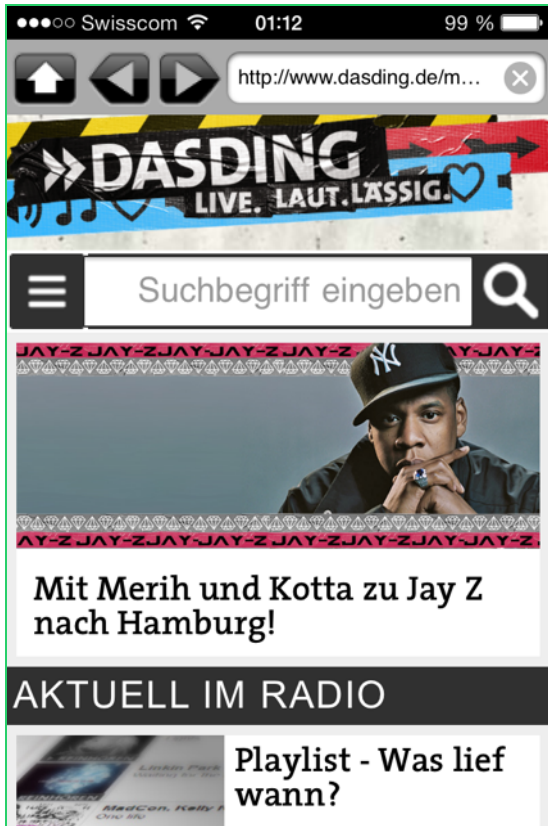
ONE APP PER PROGRAMME OR SHOW

Only for very popular radio (and TV) programs do broadcasters decide to invest in a single app. One example is "Das Ding", a youth radio station by SWR, ARD Germany, available as a Web live stream, on DAB+, as an iPhone app and via responsive design for smartphones and tablets.

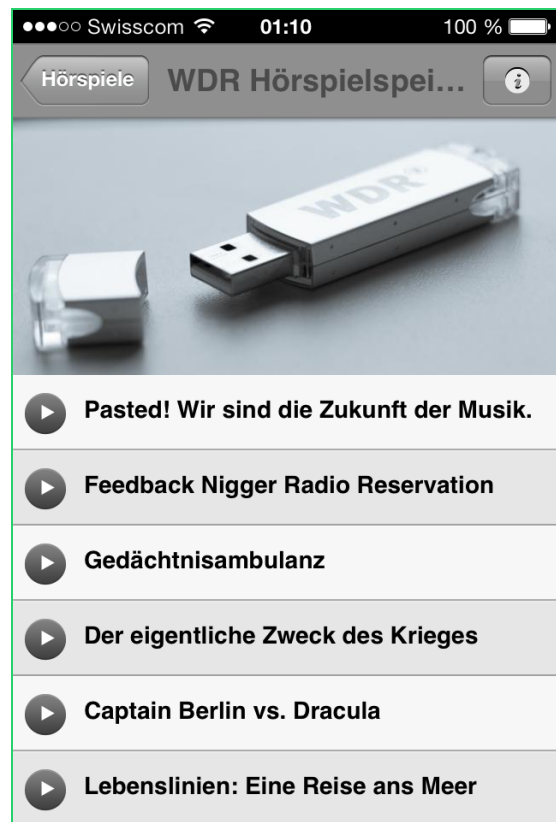
TABLET RESPONSIVE DESIGN



iPHONE-ONLY APP, INCLUDING EPG, NEWS AND TRAFFIC INFORMATION



A SPECIALIZED RADIO DRAMA APP BY WDR (ARD, GERMANY) OFFERS AUDIO FILES AND STORAGE



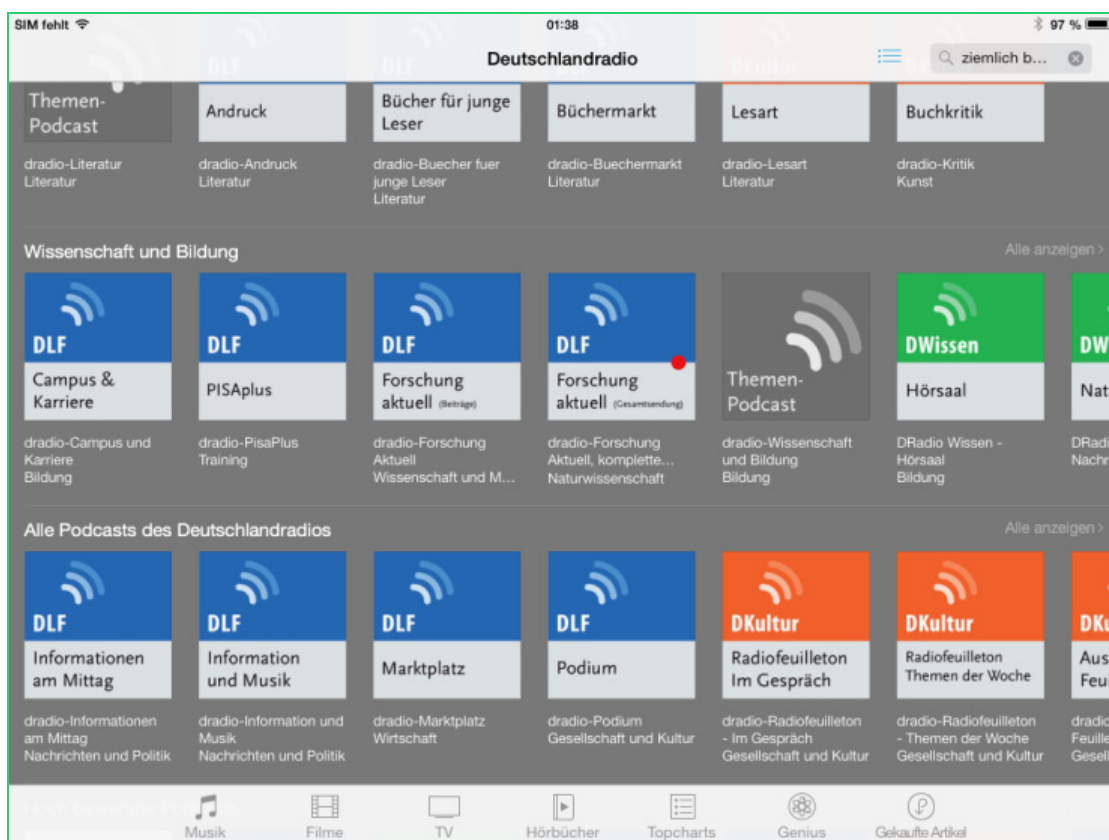
NON-LINEAR CONTENT

As already mentioned, most of the radio apps offer podcasts.

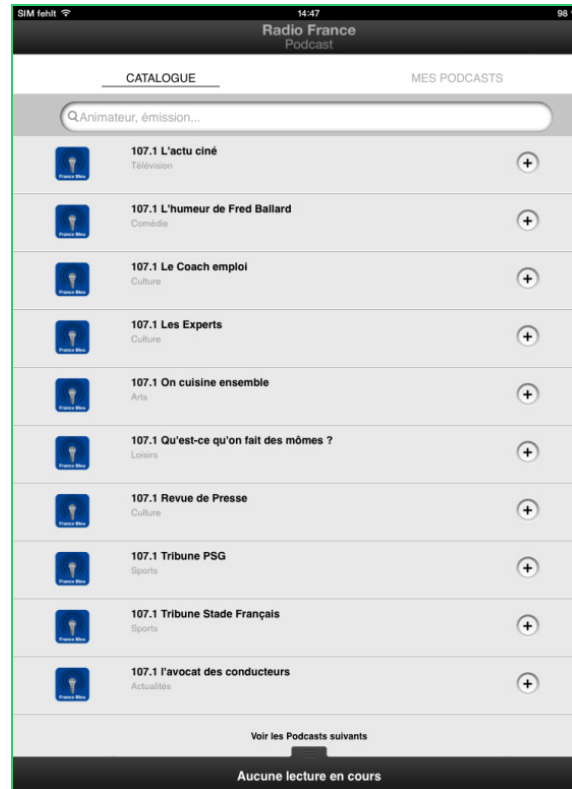
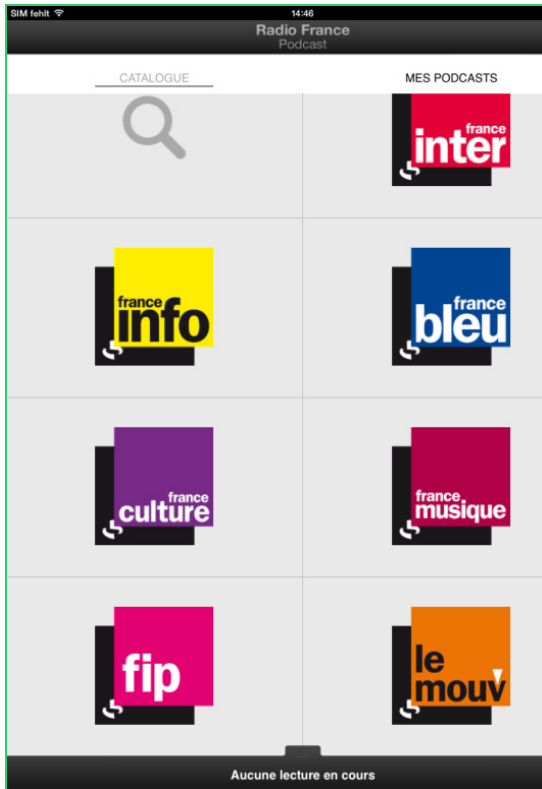
(see p.16: Podcast)

Podcasts mainly concentrate on news, comedy and special interests like commentaries or high-end radio drama and radio features. As mentioned before, not more than a third (32 percent) of organizations offer a vast selection of on-demand audios. Most select according to audience preferences.

We have found only one app which was a simple podcast app: Radio France. But for instance, Deutschlandradio offers its wide range of podcasts via iTunes - without putting them in an extra app:



Radio France podcast only app, with station overview and catalogue:



SERVICE CONTENT

As purely service-oriented content, we have information on weather and traffic, sometimes "upgraded" with coloured maps. More details were already discussed above.

(See p.36: Bottom navigation).



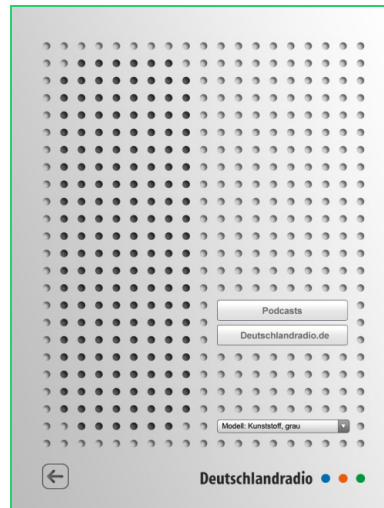
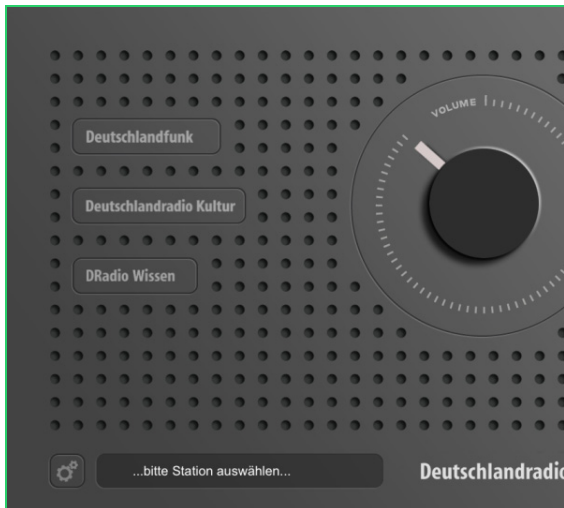
By definition one could add text news as well and on-demand audios of the latest news bulletin. This type of information appears mostly as a separate button:



The interesting thing is: only German Radio Apps offer weather and traffic news as an extra service! We found no other Public Service Broadcaster doing this.

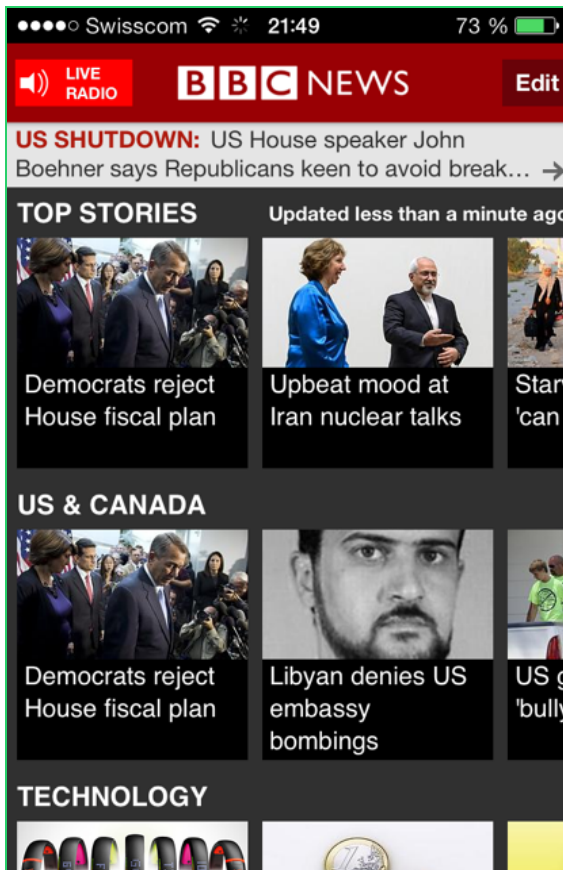
OPTICAL GAGS

Aside from the bookshelves on which national radio apps put the different stations (see p.19: Streaming only), we have found only one app which really shows a different layout: Deutschlandradio offers changing skins displaying the look and feel of a "real" radio receiver from the old analogue days.



SPECIAL INTEREST APPS - NEWS AND SPORTS

Only very few apps concentrate on special interest content, like certain genres. For instance, there are not that many news-only apps on the market, yet every provider comes up with different solutions. The best example is if one compares BBC News to tagesschau of ARD, Germany:

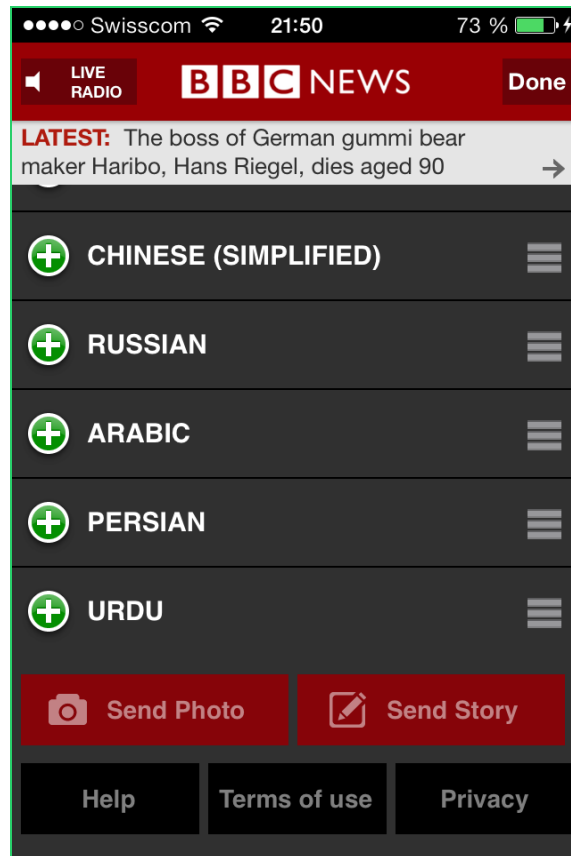
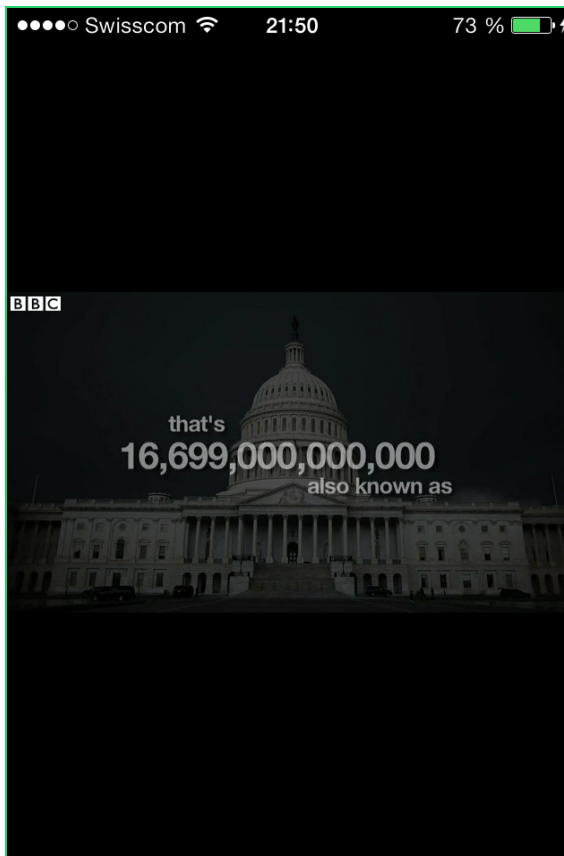


Not only the stories but also the players are differently embedded. At the BBC app, one has to open the article first, before - with a second touch - the video player begins. Then the text is faded out, only the video runs with no additional options. No audios are integrated, it's a video and text news only app.

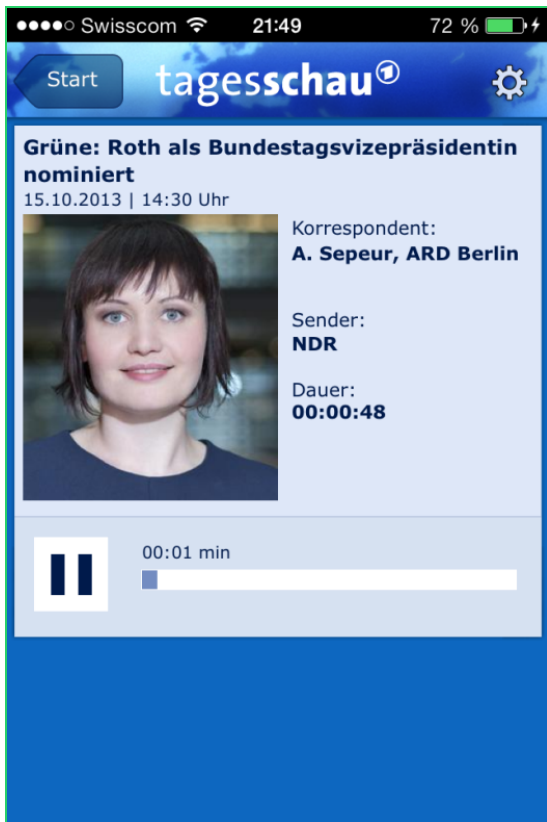
Tagesschau offers two possibilities: version 1 is a direct start of the video or audio (!) player, and the icon shows the type of media content. The other option is to open the news article first by touching its headline. In a second step, the video or audio can be started. The video player offers a rewind for 30 seconds, and even "radio off" and subtitles are possible. By the way around 70 percent of the content in the tagesschau app comes from radio correspondents.



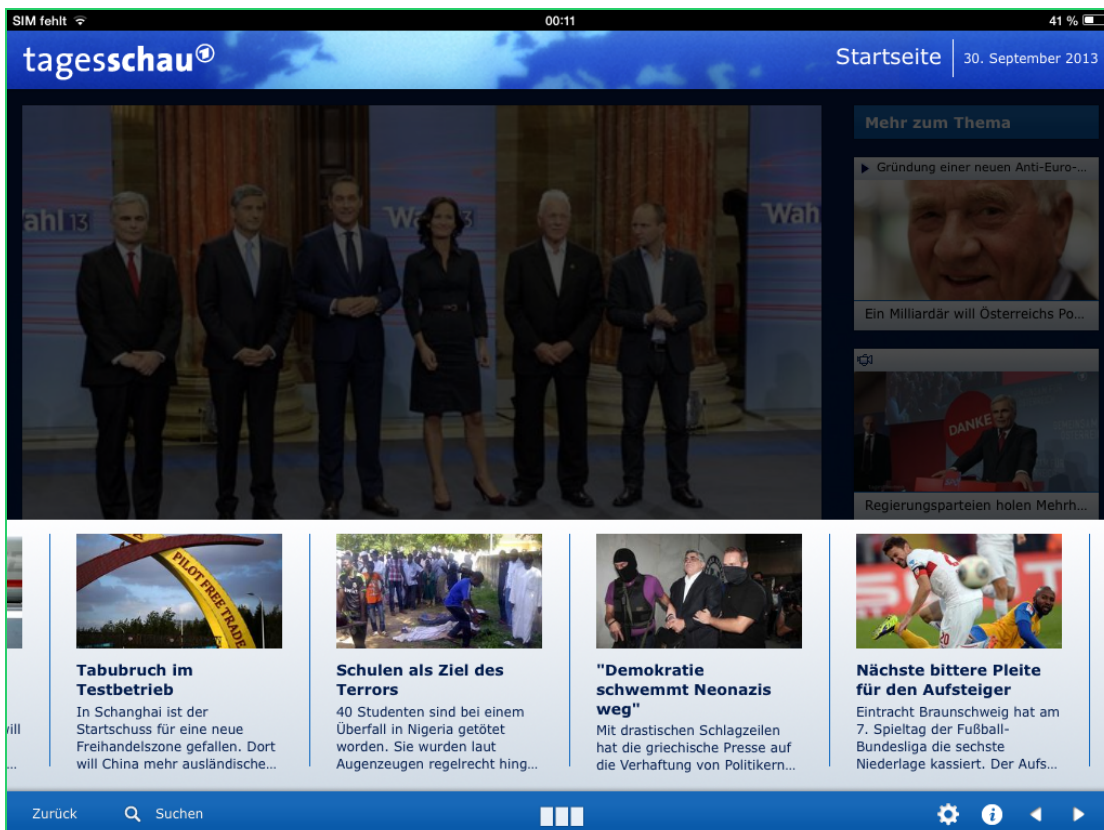
Radio comes into the BBC News app only as a live stream; no other audio files (e.g. podcasts) were detected.



Tagesschau actually adds to the current affairs audios a picture of the author.



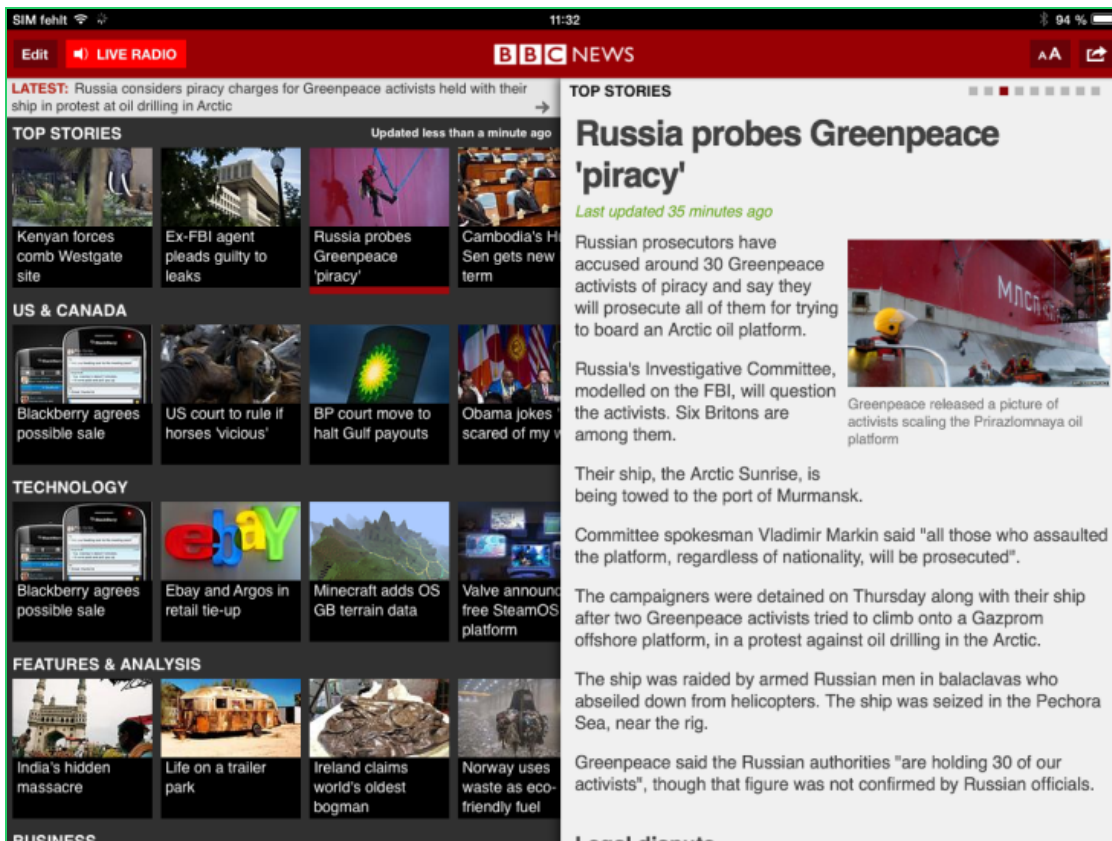
The iPad version of tagesschau uses the broader screen, and has a swiping mechanism at the lower third of the space.



Sometimes the column on the far right has no content but is just empty, which seems quite a luxurious handling of space which never happens with the BBC news app.



There, by contrast, every square inch of the screen is thoughtfully filled with information: the BBC News iPad version has story teasers on the left half of the screen in rows with a swipe mechanism, while parallel on the right half, the extended article(s) are displayed.

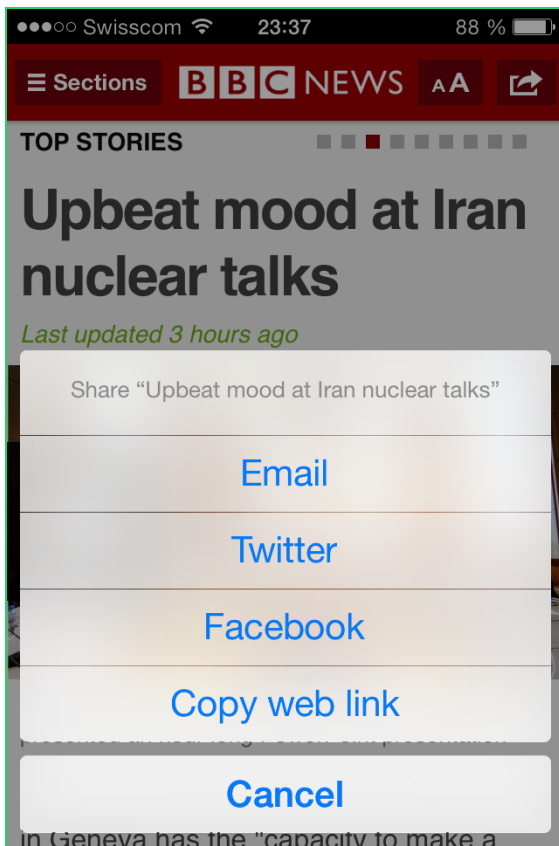




With the BBC News app, sharing content is done by clicking on the familiar icon, which offers options to copy, e-mail, and share on social networks.



With tagesschau, the icon normally used for "settings" brings in a vertical menu which offers to share the content with social networks, send an e-mail or mark it as favorite. Additionally - and this is more a setting feature - one can maximize or minimize the font.



Tagesschau also allows direct comments in the app because the app is more or less the automatic copy of tagesschau's web



The same is true for comments on the tagesschau iPad app, and owing to media politics and harsh criticisms by publishers, tagesschau must mention which program has broadcast this specific video or audio on air. This is to prevent online-only stories, which are seen as a threat to newspapers and their online news business. Nevertheless publishers also upgrade their news in the internet with videos as well.

While the BBC is strictly content-driven and story-related, tagesschau offers a wider range of additional information, which connects to existing program schedules in the linear world. The reason for this is the political obligation to do so. BBC has almost no visible connections left to any broadcast program, whereas tagesschau refers to ARD's daily flagship TV issue at 20.00. This special 15-minute news bulletin can be consumed as one video.

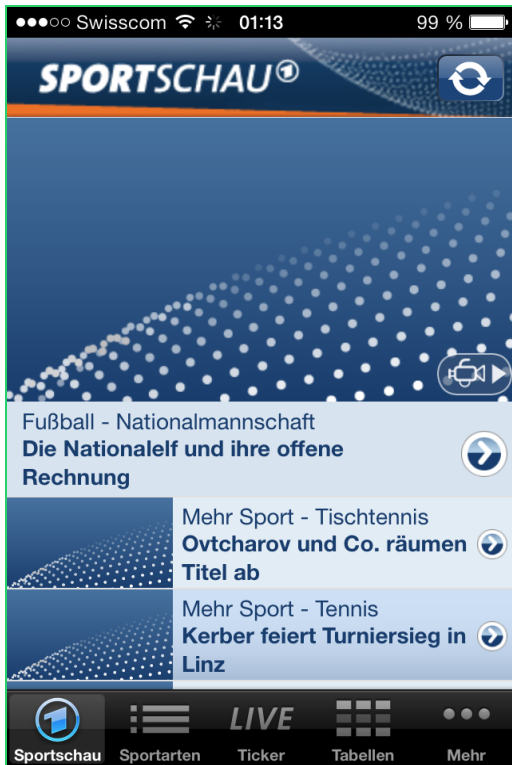


The BBC, on the contrary, does not have any recorded TV bulletins on its app but concentrates on single stories only. There are also no "related stories" to a bigger topic as tagesschau normally does.

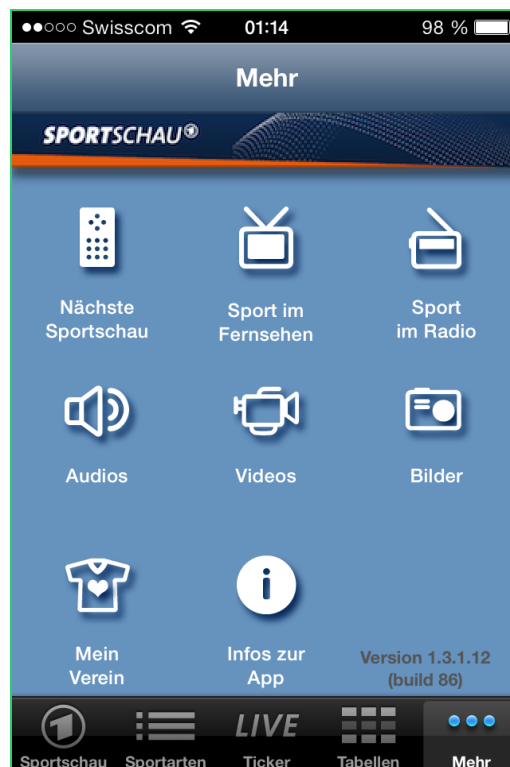
With BBC News, every news article is a stand-alone item, the content of which is updated immediately by the app when opening the specific page - and showing clearly the time status of the chosen news item:

Last updated 3 hours ago

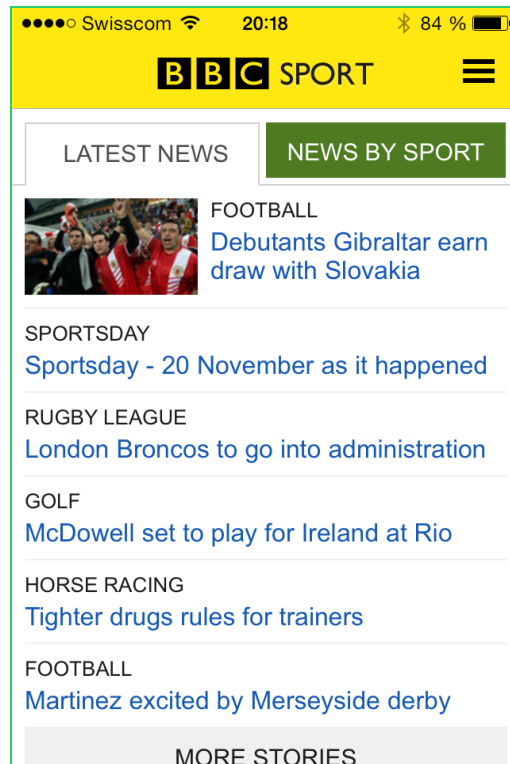
Another genre-driven app type is the sports app. For instance, ARD offers **sportschau** not only as a TV show and a multifunctional website with videos and audios but also as an app. Navigation functions more in the classical way that we know from websites with menus and buttons.



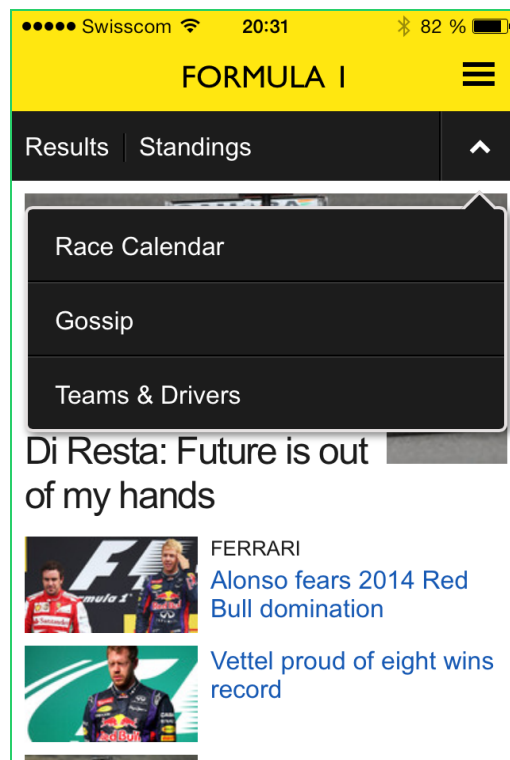
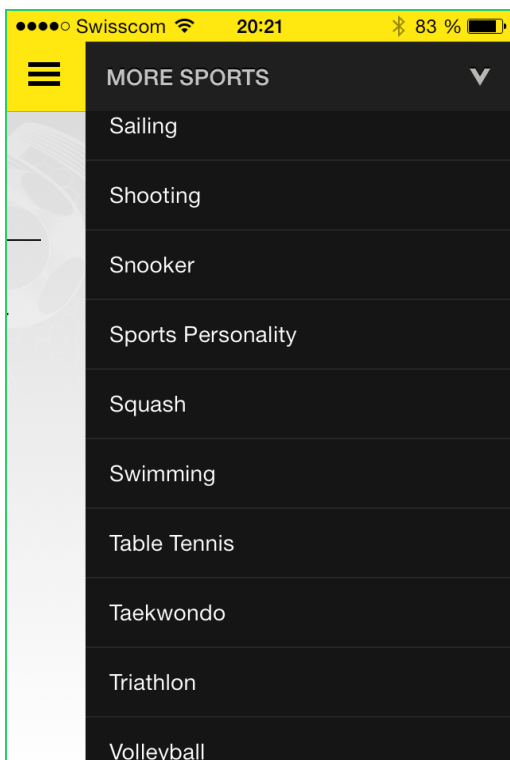
Depending on the sport, the app follows games with a live ticker, with videos, audios and photos also covering the events. The current table is available for many other sports as well.

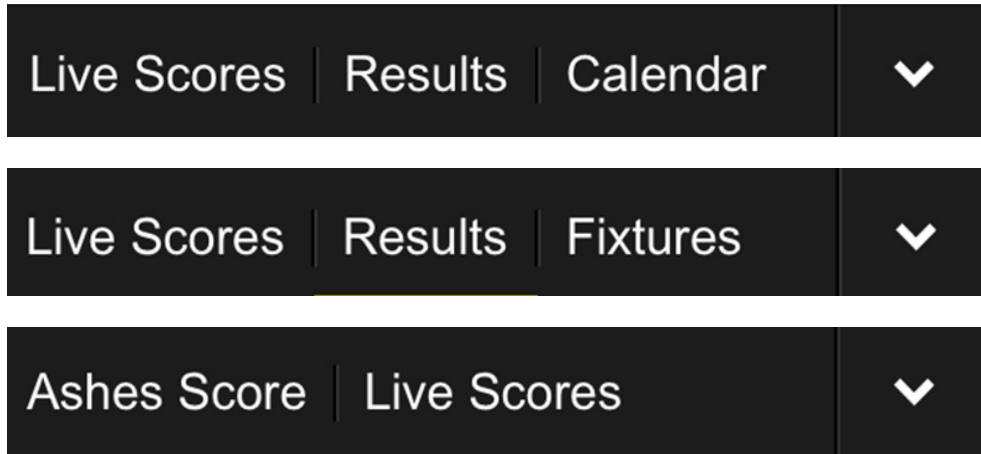


On the contrary the [BBC sport app](#) concentrates on text and photos only - no video, no audio.

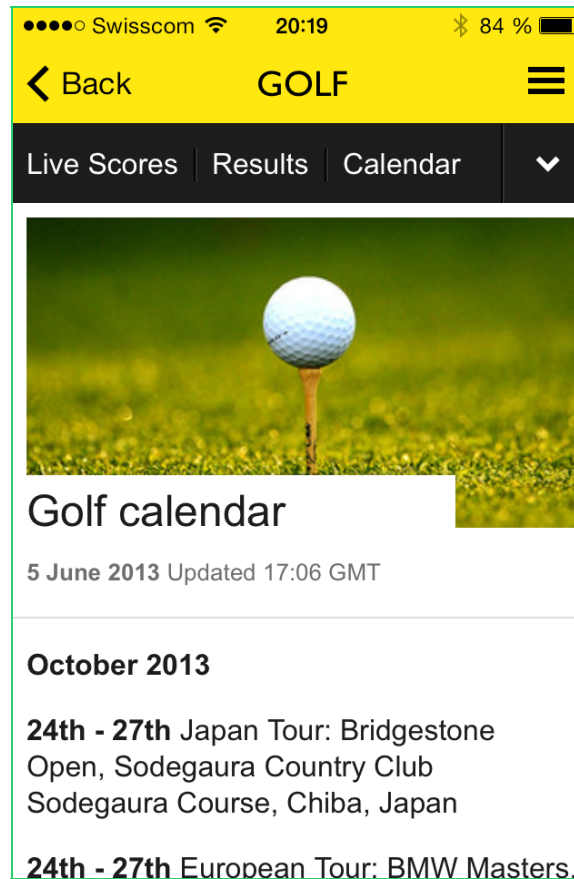


With very detailed menus a huge variety is covered: 47 different sports plus special pages on bigger events and interesting background articles on sport topics.





This app is a full service sports channel, free of charge.

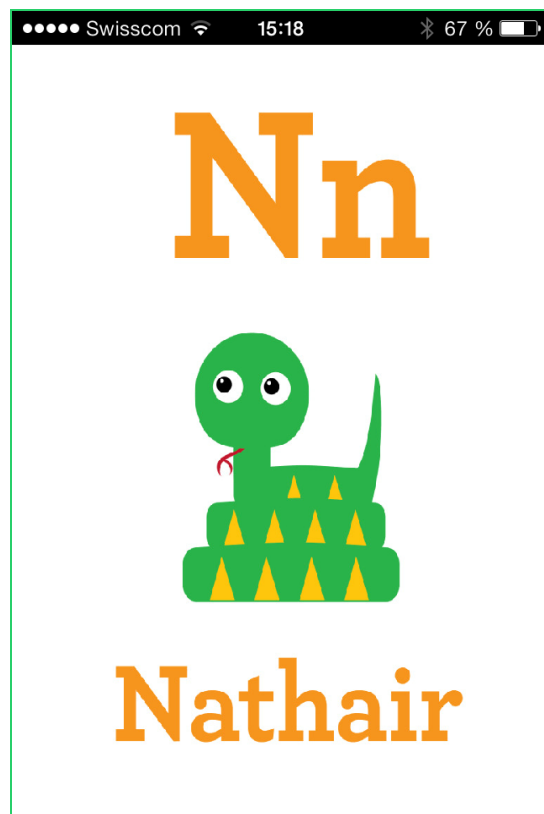
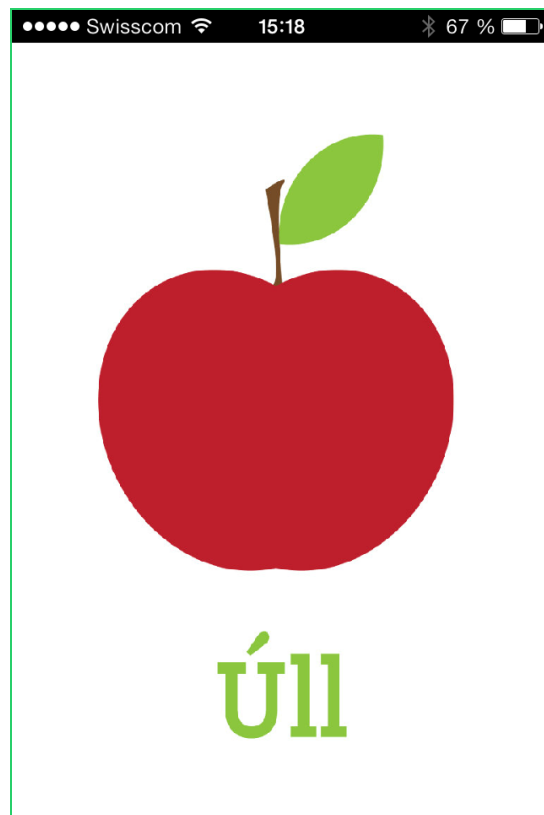
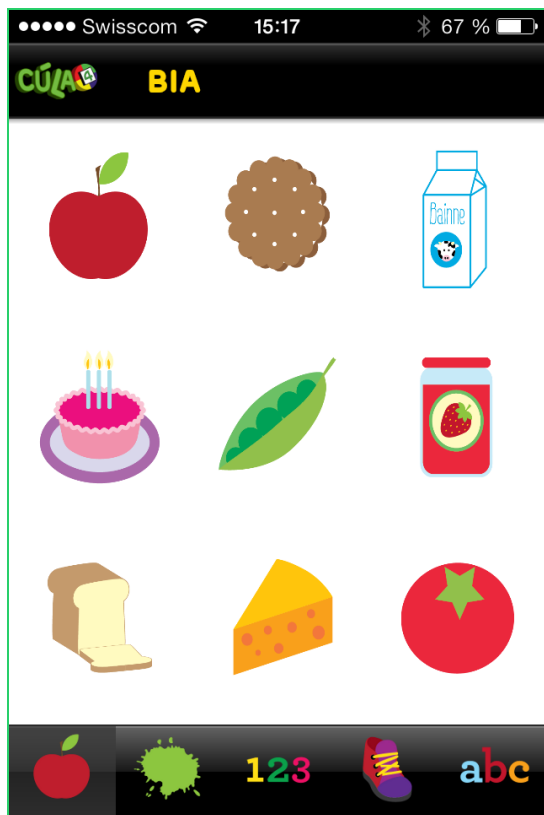


GAMES (AND LEARNING)

We found around 55 game apps, most of them in two or even three versions (android, iPhone, iPad). Many target children, either to educate or entertain them. A classic German TV show, for instance, is the "Sandmännchen". The game app makes possible different things, one of which is playing football:



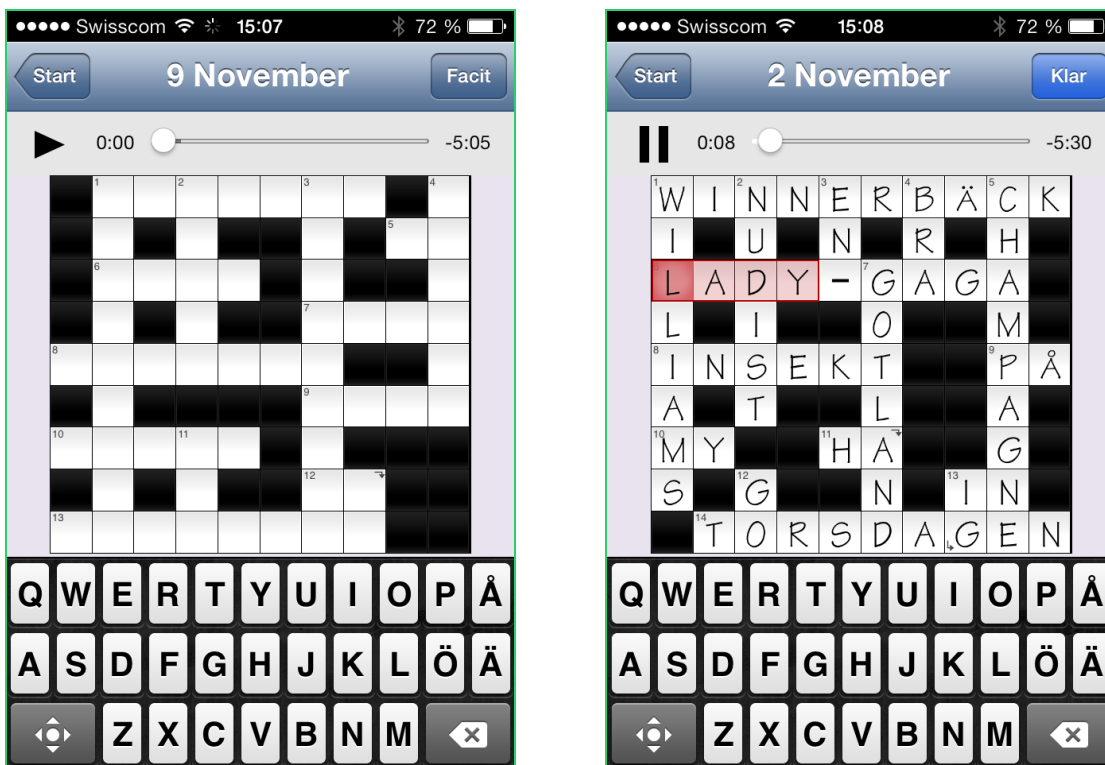
The Irish app "Culacaint2" is about learning Gaelic. Coloured pictures with letters and words, written and spoken, do the job:



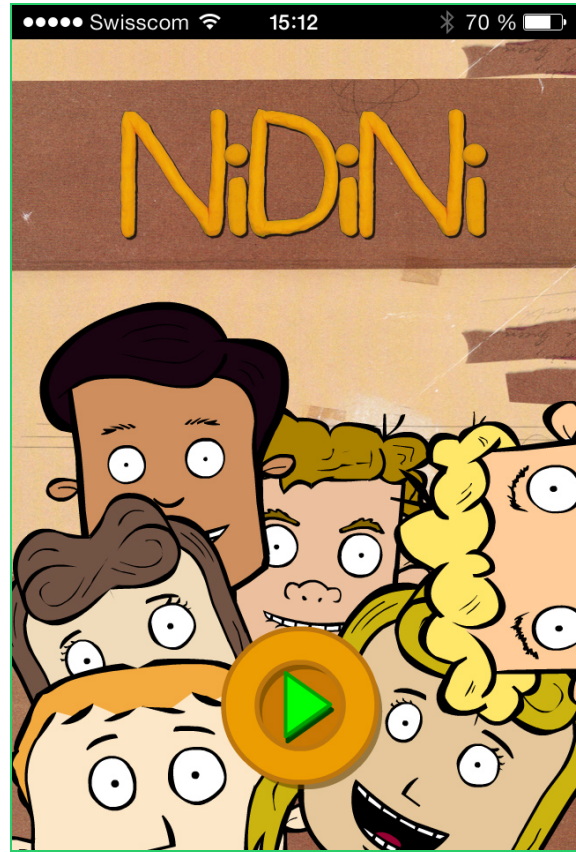
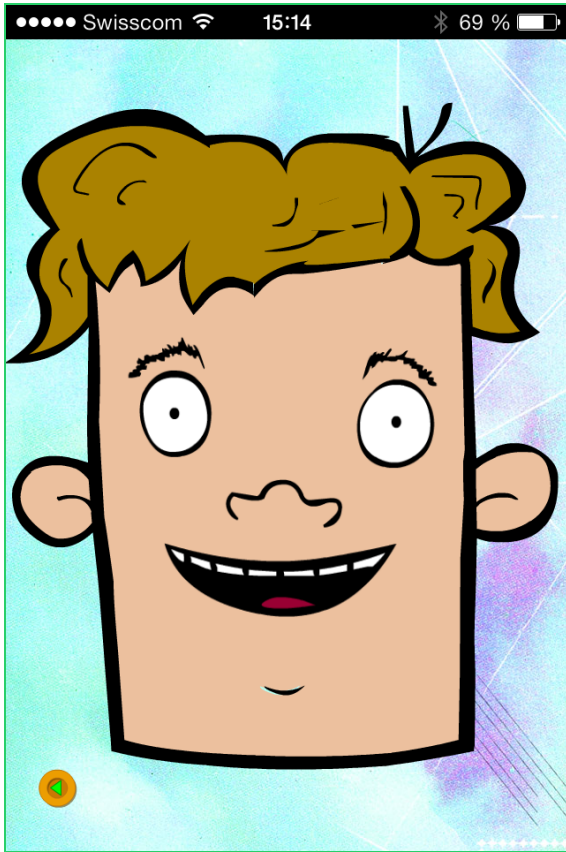
Whereas the Finnish app from YLE shows a mix between comics and videos with real people, explaining the world to children:



Rather intellectual is the "Melodikrysset" app of Swedish commercial radio P4. They connect audio with a crossword quiz, obviously also available on air:



A more fun-driven app is [NiDiNi by S4C](#), a Welsh-language television channel. Basically one can choose an avatar, then after agreeing to open the microphone for this app, the avatar repeats what is told in front of him - with a funny voice:



A typical gaming app like thousands of others for desktop or mobile use is "[Top Gear: Stunt School Revolution](#)" by BBC Worldwide. The app adjusts automatically to the default language set in the device. Unfortunately, there is no connection to the public service TV (or radio) program here at all. But it is fun driving on your smartphone sports cars and letting them jump over a deep valley:

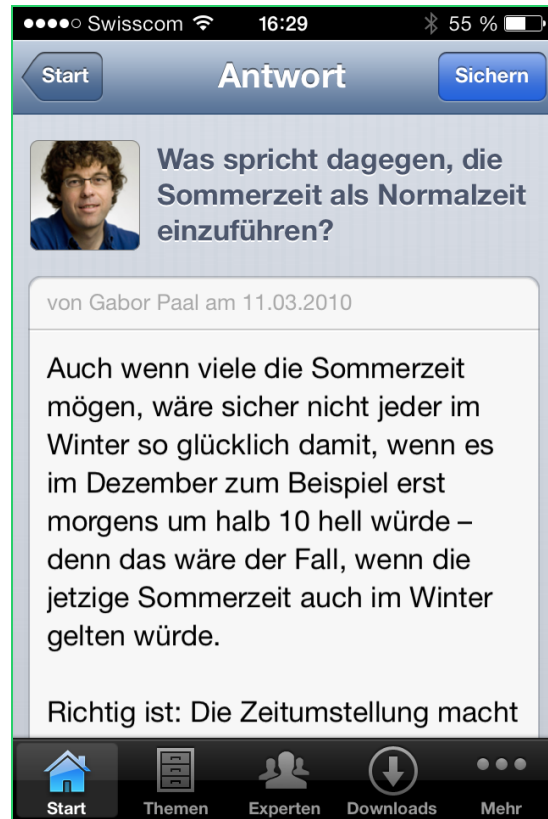




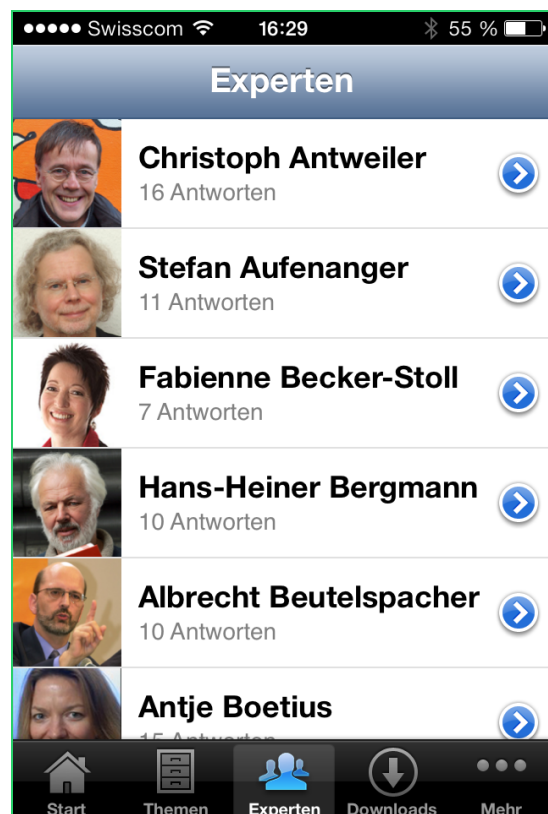
This BBC app is the only one that we have seen in which additional services / game products are sold for real money; in fact, it is a game business app:



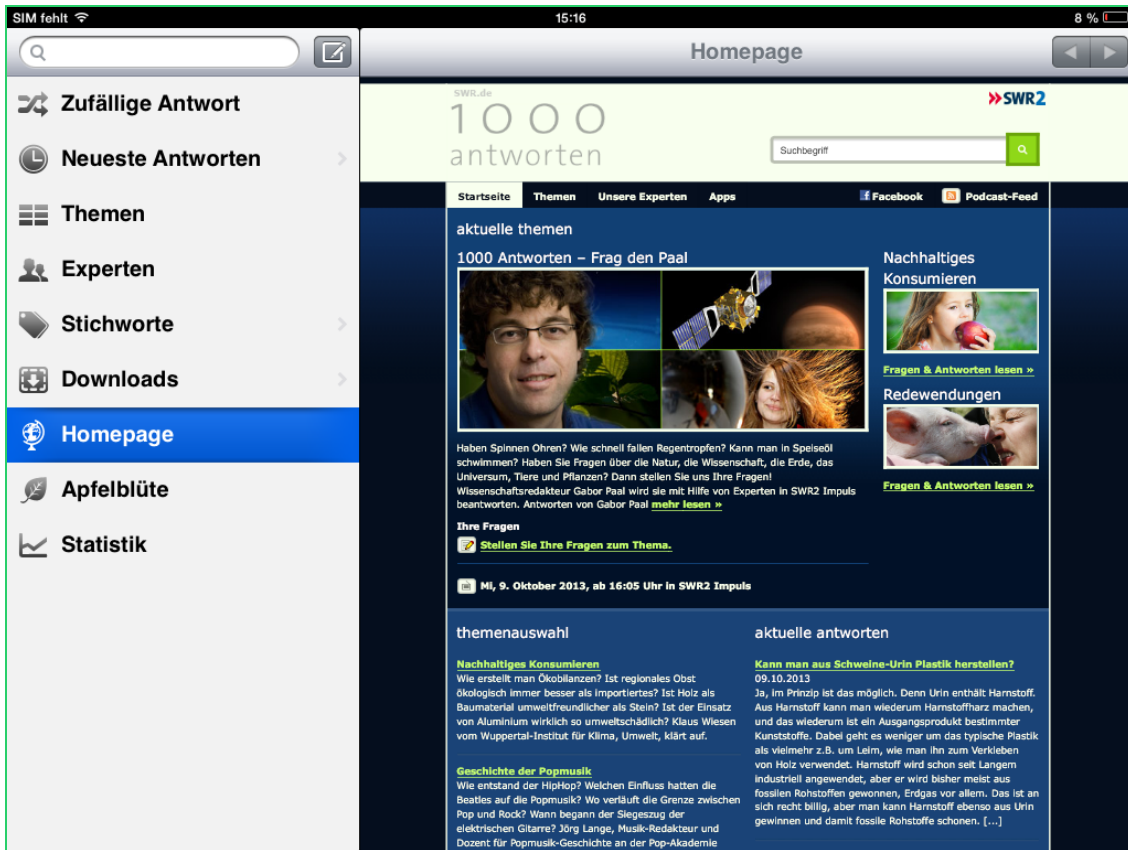
SWR's "Thousand Answers" is a typical spin-off app using the brand name and title of a successful radio program serial in the science-magazine SWR2 Impuls in order to offer an education-oriented learning game. This app functions like a quiz.



Besides the random offer of questions (or latest subjects), the app allows users to choose different topics and even shows who is the expert giving the answers.



The iPad version works similarly, only the navigation differs and has more the look and feel of a website.



A direct take-off on a successful TV show is the "Samschtig-Jass" app by SSR. It is all about the very popular Swiss card game Jassen. The app offers the different Jass-types as well.

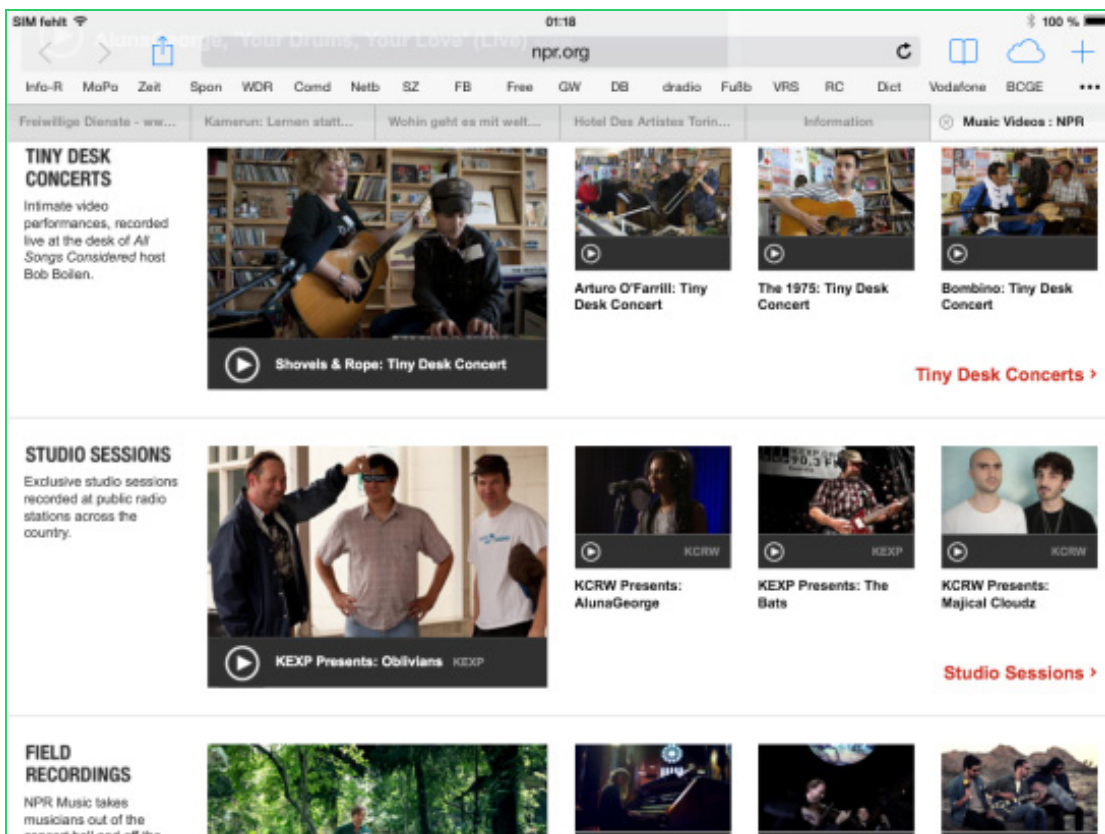
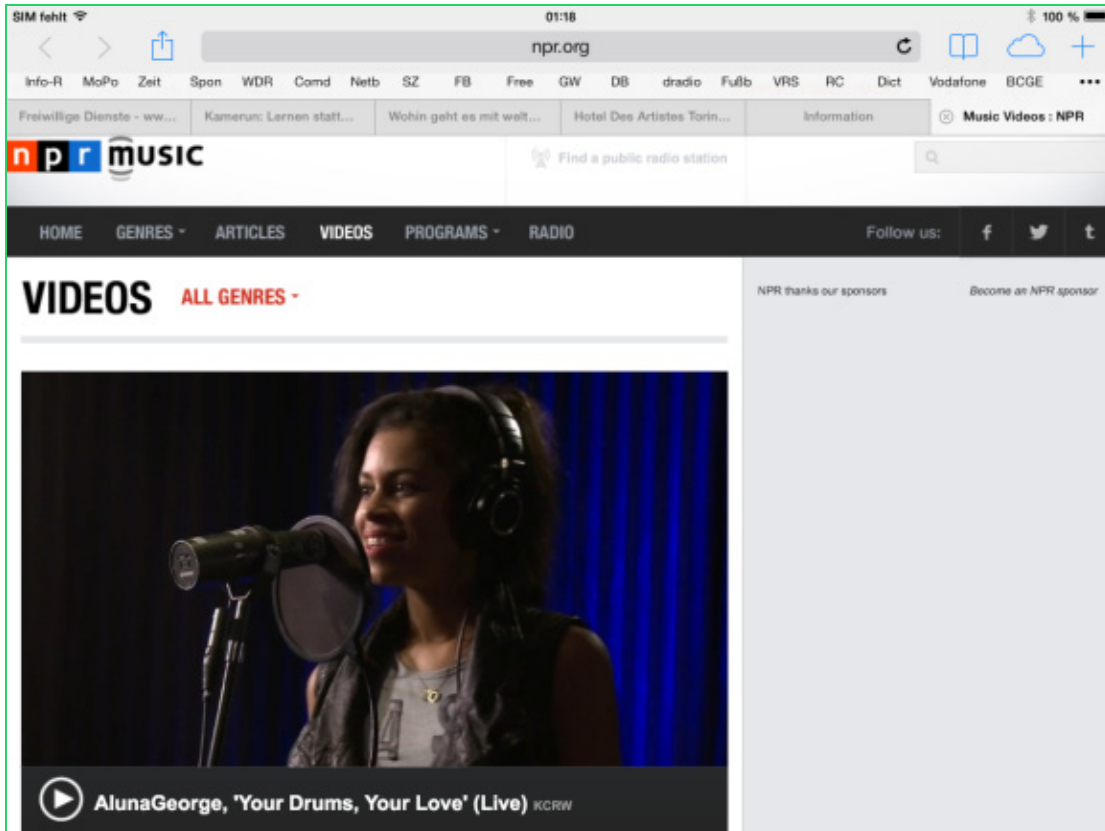


Last but not least, there is football - the most attractive sport in Europe. The commercial subsidiary of WDR, the WDR media group, runs a gaming app in which users can bet on the outcome of all the matches in the Premier and Second Leagues. The name of the "club" app corresponds to the title of the radio sports show "Liga Live".

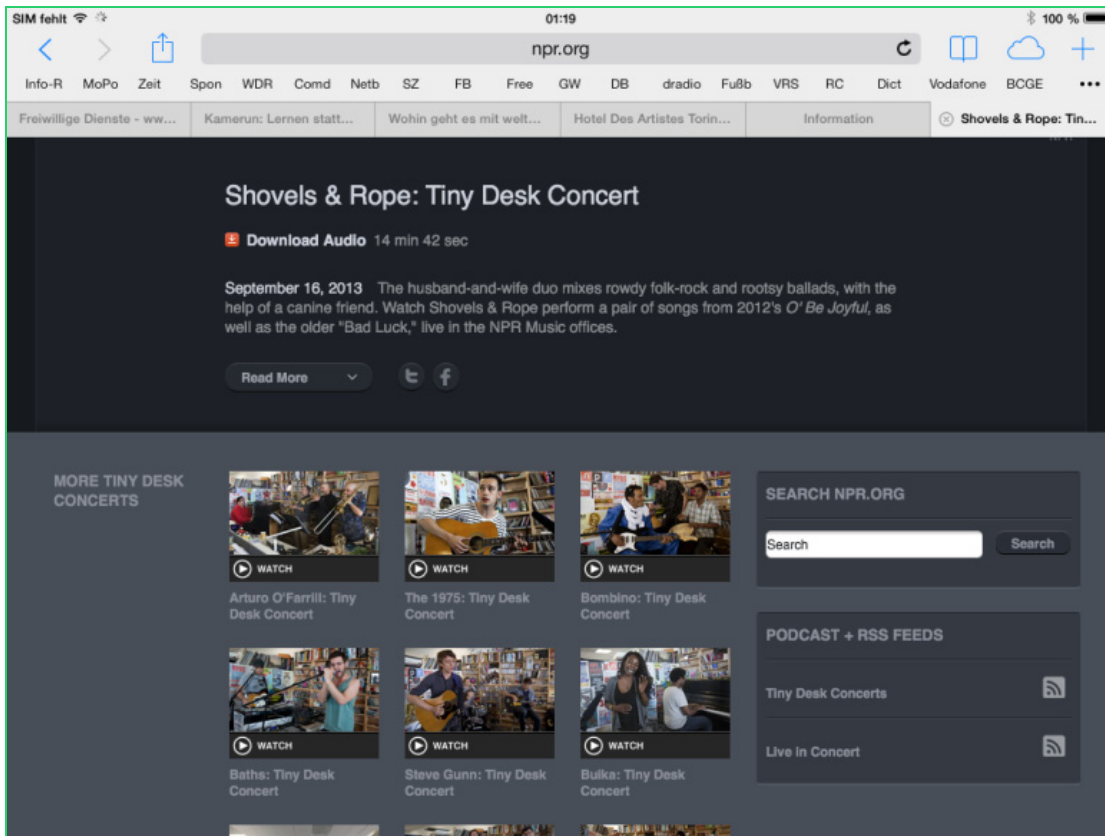


OTHERS

As an example from abroad, the app of National Public Radio NPR in the US shows how normal it is for a radio station to integrate videos on its website / app:



But they offer audio for download as well:




Most exciting is the NPR infinite player. The online radio player, also available as an app, offers audience the choice to personalize the radio. As soon as a listener has logged in (and accepted the cookie policy of NPR) the player starts asking if the audio just running suits the listener or not.





With this like and dislike feature the player “learns” which topics a listener prefers - and shows them next time preferred.

NPR splits its content up into eight different channels:

<p>CHANNEL 1 This is NPR</p>  <p>A mix of news, interviews, commentaries, reviews, and offbeat features</p>	<p>CHANNEL 2 Just the News</p> <p>Top headlines from the U.S. and around the world</p>
<p>CHANNEL 3 Conversations</p> <p>Issues, thought-provoking interviews, and big ideas.</p>	<p>CHANNEL 4 Music in Conversation</p> <p>Interviews. Exploration. New music and the artists behind it.</p>
<p>CHANNEL 5 Music in Performance</p> <p>Exclusive concerts and studio sessions</p>	<p>CHANNEL 6 Arts & Life</p> <p>Books, movies, and pop culture from your favorite programs</p>
<p>CHANNEL 7 Serious Fun</p> <p>The best of Wait Wait...Don't Tell Me! and Ask Me Another</p>	<p>CHANNEL 8 Recommended Stories</p> <p>Recent and past stories, customized to your interests</p>

LAST BUT NOT LEAST

SWR (ARD Germany) offers a Radio app especially designed for blind users. The app is optimized for smartphones and tablets as well and contains news, interviews and comedy. Additionally the app is able to read news of all kinds to listeners.

(Source: epd-medien 27.09.13)

SUMMARY: LAYOUT / NAVIGATION

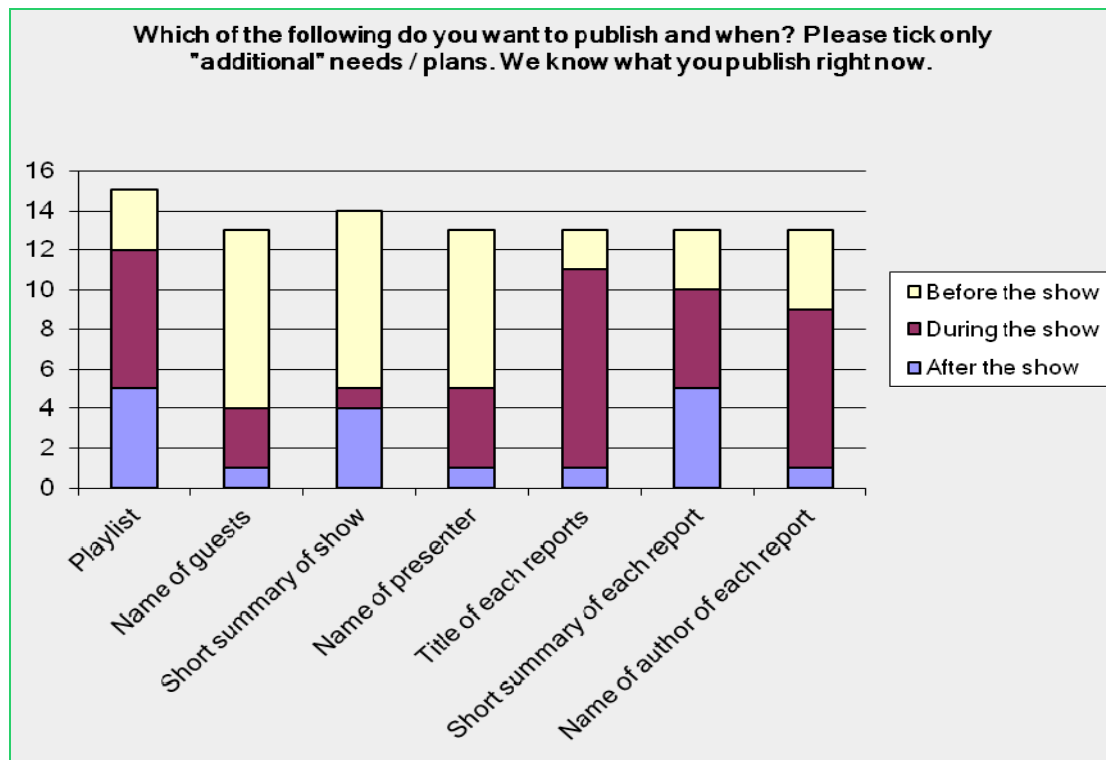
The layout and navigation findings in general show quite clear that on the one hand the "trained" habits for iOS or Android users are reflected in media apps as well. There are rarely really new ideas on the market. The main reason could be that nobody wants to risk losing audiences / users while offering an unknown, perhaps even bizarre navigation logic. On the contrary, apps should be handled easily and intuitive, best of all with rich content and a vast variety of features, but without any hidden or non-logic functions. Normally no one would use a manual to understand how an app functions. Therefore: make it easy!

2.8 PLANNED IMPROVEMENTS

Asked about plans to change or even increase the information published via their app, 54% said that they intended to do so.

The top additional information plans are:

- **Before the show:** display names of guests (26%), give a short summary of the show (26%) and tell the name of the presenter (23%);
- **During the show:** display title of each report (29%), give the author of each report (23%), show the playlist (20%);
- **After the show:** give a short summary of each report (14%), show the playlist (14%) and a short summary of the show (11%).



Additional plans include a "7-day catch-up programme via apps" (Austria) and "Videos, photos and podcasts after the show" (Greece).

Among the 17% who do not plan to increase the information they publish, all but one are satisfied with the current situation. Only Switzerland RTR is not planning additional information as they have "no more manpower and money available".

2.9 CONNECTED CONTENT VIA METADATA MANAGEMENT

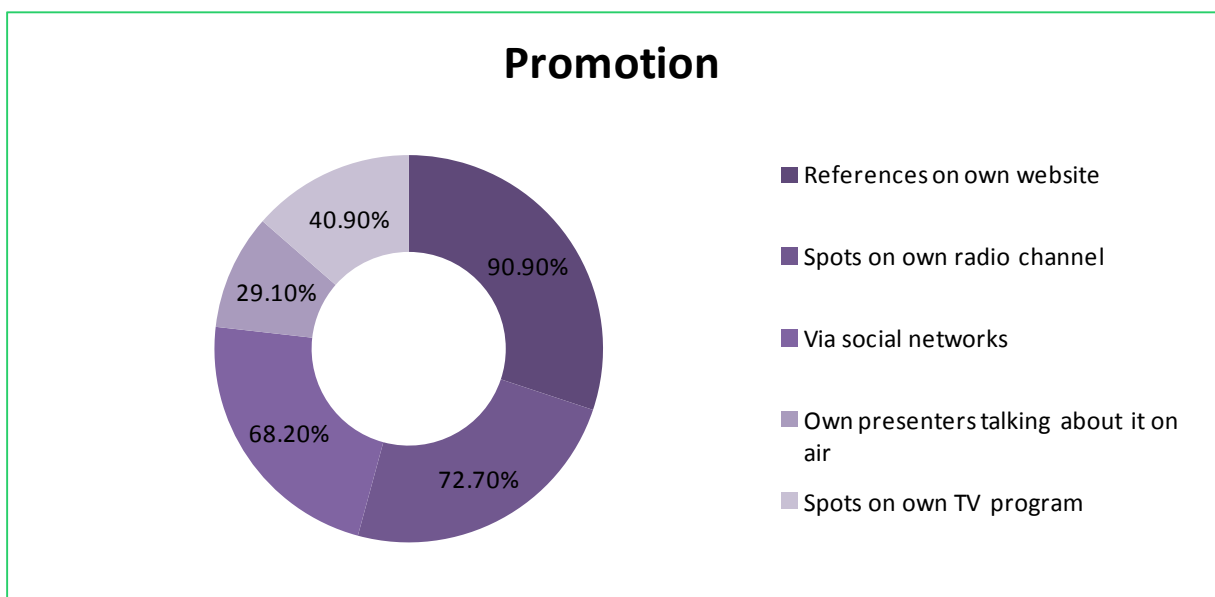
It is in the nature of media apps that they display content which is available on air and via the broadcaster's desktop and/or mobile websites. The challenge is to have cost-effective and easy-to-handle workflows in order to create this content and its relations on the different distribution platforms.

42% of the answering organizations offer their related content through links, whereas 31% have not even thought about relating their content at all. Among those that use related data, two thirds feel dissatisfied with the quality of their metadata, with the key reasons given as compatibility and capability limitations as well as typing quality. However, one of the satisfied Members was ERT (Greece), arguing "because our reporters and editors are well trained to use accurate metadata and tags for every article published".

2.10 PROMOTION

Promoting their apps is an issue for 88% of organizations. Different ways are used. The top five ways to promote are:

	Percentage
• References on station's website	90.9%
• Spots on own radio channel	72.7%
• Via social networks	68.2%
• Own presenters talking about it on air	59.1%
• Spots on broadcaster's own TV program	40.9%



None of the organizations promote via spots on commercial TV channels. Some less utilized methods include spots on commercial radio channels and public poster campaigns (Greece) and “cross marketing in all of our apps” (Denmark).

There were just three organizations not promoting their apps: Latvia sees no benefit in app promotion, while Algeria and Switzerland SRF are not allowed by law to promote apps.

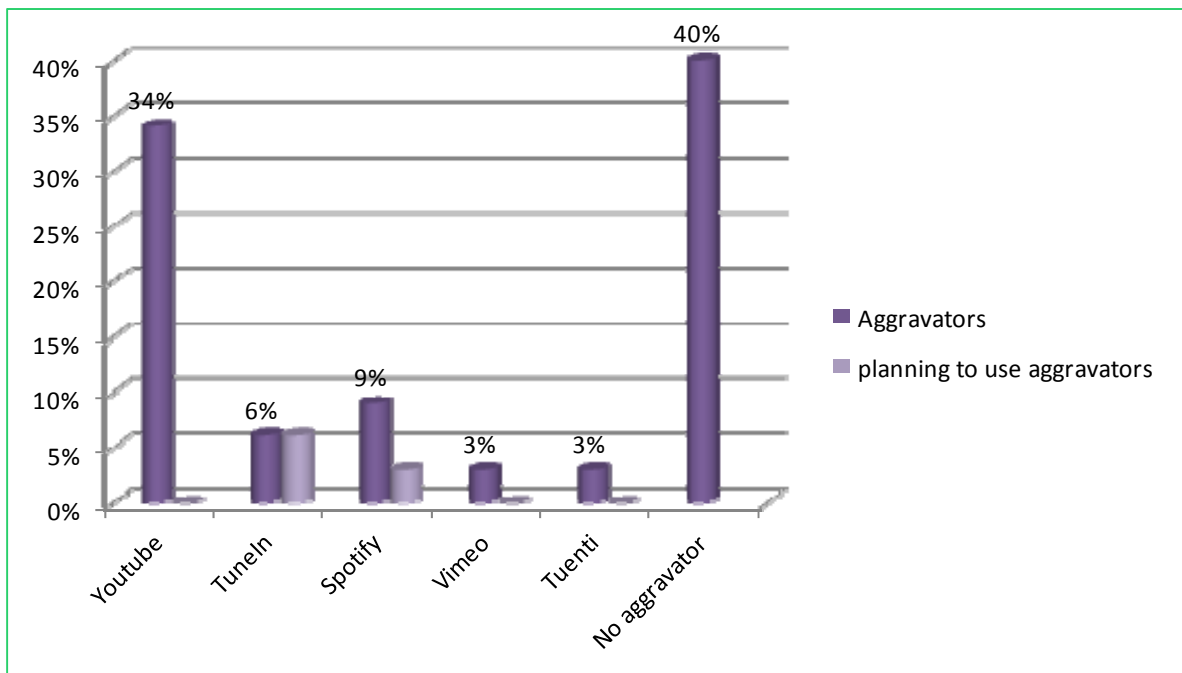
Asked the other way round, which means if apps themselves are used for promotional purposes, around 50% answered that they do not promote at all via their app, but 24% use apps to promote mostly events by their own organization. Just three organizations (Ireland, Spain, Sweden) promote featured shows, only Greece promotes partner events, and Switzerland RSI promotes their program and their game apps.

3.0 STRATEGY AND FUTURE

3.1 IN GENERAL

A general strategy which aims at increasing the on-line visibility of a broadcaster is to collaborate with existing major platforms. For instance, 34% work with YouTube, making this Google-owned video platform by far the main aggregator used because of its popularity and far-reaching audience. Even radio-only EBU Members have premium partnerships with YouTube, using explicitly the video upload function as well. Other aggregator platforms used:

- 9% work with Spotify and 3% plan to work with them
- 6% are using TuneIn and 6% plan to work with them
- 3% are working with Vimeo and 3% with Tuenti

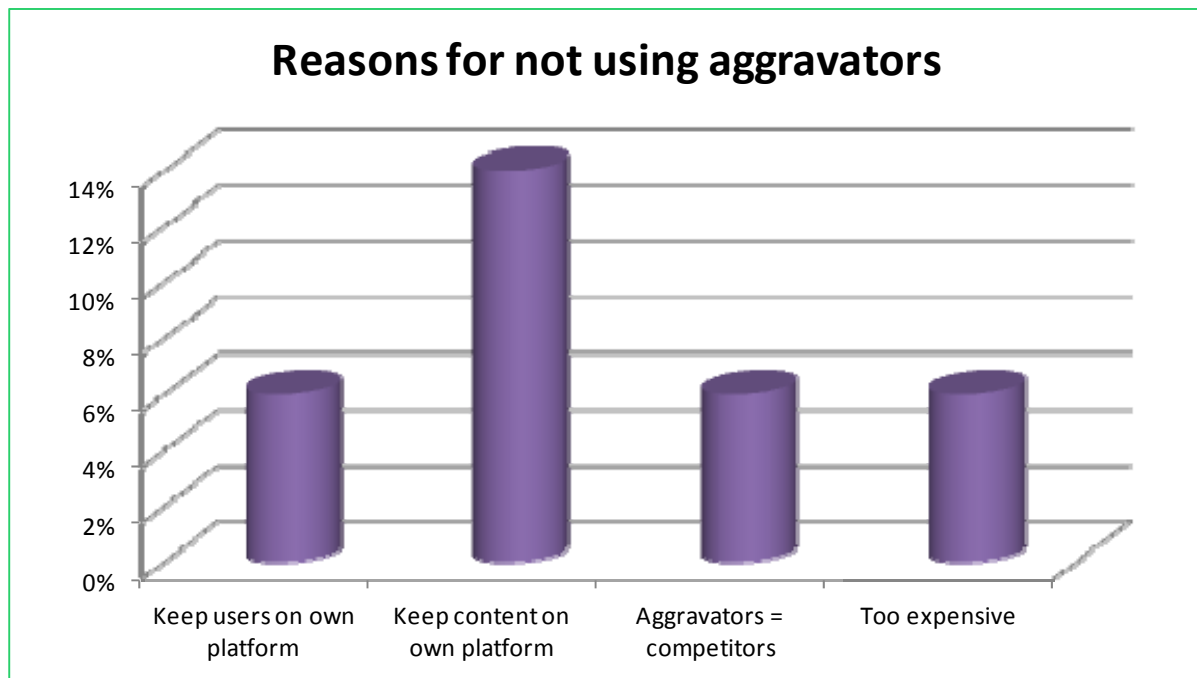


Aggravators used

40% are not currently planning to work with aggregators for varied reasons:

- 6% want to keep all users on their own platform(s)
- 14% want to keep all their content on their own platform(s)
- 6% see aggregators as competitors
- for 6% it is too expensive to collaborate

Other reasons include: legal restrictions, desire to keep control of their content and the way it is quantified in cost terms.



3.2 NEXT STEPS

Regarding next steps in developing their app(s), a clear majority (79%) plans to add new functions. Key features to be included are EPG, podcasts, weather info and links to own websites.

Among those not planning to add new functions, 11% are satisfied with their current strategy and 3% have no money to develop their app.

When it comes to the top features considered the most important in media apps, the ranking does not exactly mirror the reality of features currently in use:

Top	Considered	Found in radio apps		Found in TV apps		Found in mixed apps	
1	Live stream (radio)	Live stream	91 %	Podcast	50 %	News	79 %
2	Video on demand	Playlist	59 %	News	45 %	Live stream	70 %
3	Live stream (video)	News	59 %	Live stream	45 %	Podcast	52 %
4	Podcast	Podcast	53 %	EPG	33 %	EPG	34 %
5	EPG	EPG	31 %	Weather	9 %	Weather	34 %
6	Text News	Weather	29 %	Ads	6 %	Playlist	14 %
7		Traffic	26 %			Traffic	12 %
8		Ads	3 %			Ads	9 %

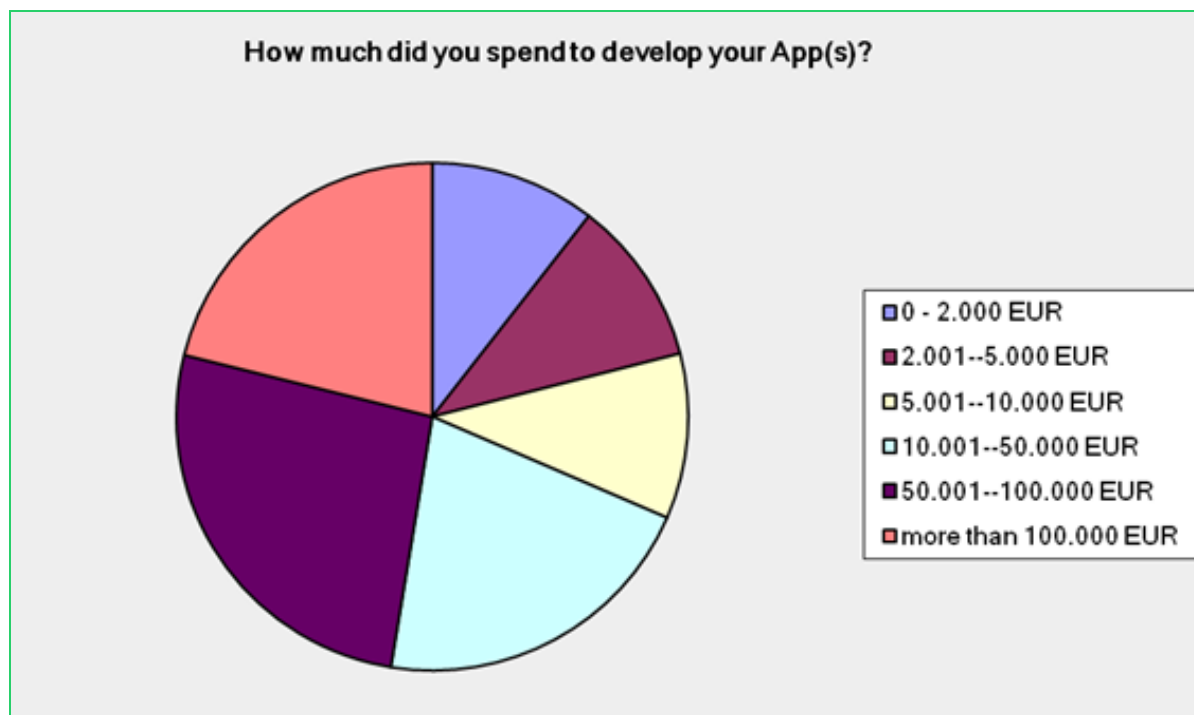
There are some interesting findings when comparing considered app features with the actual existing ones. As the table shows, a live video stream is considered more important than it is in reality, probably because offering live video is technically more complex and much more expensive than streaming radio and sometimes complicated in terms of rights.

Weather and traffic news do not play a role in the considerations, perhaps because navigation devices and/or specialized apps now offer traffic and weather information. So a broadcaster is no longer needed to do so, although weather and traffic rank precisely among the most attractive radio content, next to music. This sounds contradictory only at the first glance because there is a big difference in how people are used to consuming live radio (listening only) and how they use specialized apps for weather and traffic, which are often connected to the location where the consumer currently is. This geo-reference used not to be part of a listening experience to radio and is therefore not expected. This could perhaps change as soon as consumers start to listen more via their mobile, geo-located devices to live radio, especially when manufacturers might introduce the [Euro-Chip*](#) to ensure cost-free listening to broadcast signals everywhere.

**The Euro-Chip Initiative intends to improve the popularity, access to and experience of radio through the launch and promotion of free-to-air analogue and digital radio services in various devices through coordinated actions. Euro-Chip is the marketing-slogan to achieve this goal, irrespective of the technical realization. Major European Broadcasters signed the [Euro-Chip Memorandum of Understanding](#) already.*

3.3 HUGE VARIANCE IN INVESTMENT

The amount of money spent on developing an app is extremely varied among organizations: In 2012, 6% spent the least (less than €2,000) and 11% spent the most (over €100,000). This huge spread reflects partly the highly different situation in every Member country but shows also the different priorities of broadcasters.

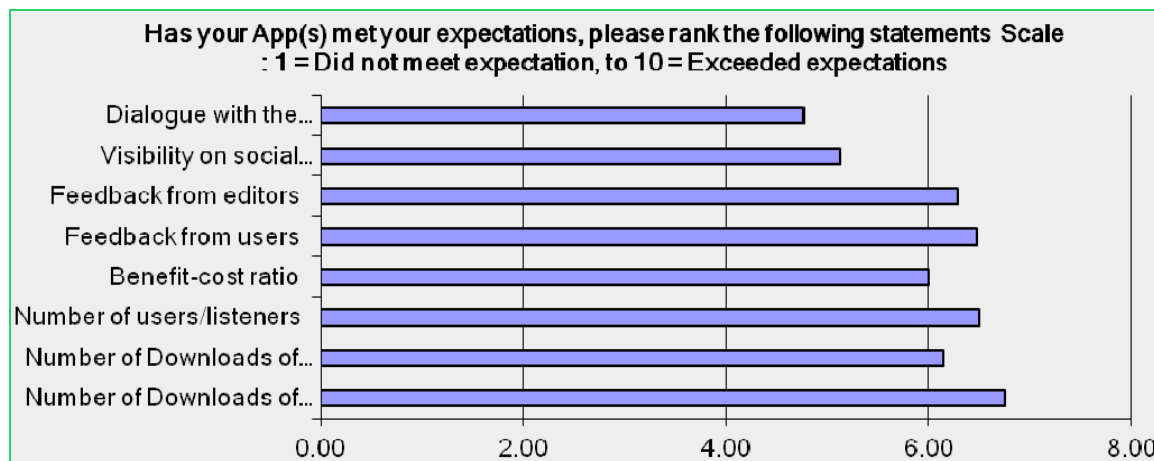


The amount allocated for developing app(s) in 2013 is just as varied throughout the organizations: 9% allocated the least and 11% the most. So the overall message is that at least all of the organizations are somehow interested in apps and follow the developments in the converging media world, some with more, some with less enthusiasm and opportunities.

3.4 PERFORMANCE VS. EXPECTATION

Apps in general are performing only slightly above expectation. When asked to rate on a scale of 1-10 if their apps met their expectation, the average score was 6.0. The reason behind this cautious rating could be the not very exact definition of success factors. Additionally, almost every Member is still somewhat in the dark when it comes to new media and how to reach the audience via mobile and Internet platforms. Markets are moving fast since a few years especially in the Internet driven sectors. Therefore being cautious while able to react quite fast to new trends seems to be the goal of today.

More specifically in terms of satisfaction, the number of downloaded apps registered the highest average rating (6.8), but dialogue with the audience the lowest (4.8).



This means that there should be more efforts in the future to engage in contact with listeners, but how this can be achieved remains unclear. If one compares the above-mentioned figures (see p.17: Interactions with the audience via social networks) on direct communication tools with the audience, it seems that the majority of listeners simply do not want to be bothered with any social media communication and prefer to listen instead to the radio program only.

Overall, 55% of the organizations are satisfied with their current app(s) strategy - or currently have no money to change it. Some plan to create an app for every program or channel instead of one app for the whole station/company. 6% have their strategy restricted by media laws and regulations, meaning that a change in number or size of apps seems to be quite difficult or impossible for them.

ARD has upgraded its Internet portals: tagesschau.de and others now have a "responsive design". This means that the layout of the websites adjusts automatically to the size and resolution of the screen on which the site is opened. Therefore it makes no difference if a user opens tagesschau.de on his smartphone, tablet or desktop computer - in any case the layout is optimized for the individual screen.

Source: epd-medien, 03.05.13

4.0 CONCLUSIONS

Taking the latest studies into account, which show a rapid increase in time per day of Internet use (up to 169 min., [ARD-ZDF online study 2013](#)), combined with the steep rise in mobile devices on the market, broadcasters are definitely trying to cope with these developments by putting resources into apps and mobile performance of their content. Of course, political, legal and financial conditions differ throughout Europe, but the general goal is to reach audiences in this convergent world as well - taking into account not only the growing number of available devices for consuming radio, but also the platforms on which listeners communicate. Most of the apps analyzed use this knowledge and connect their radio mobile program with social networks.

Some trends are visible: Apple products are still at front when it comes to apps, closely followed by Android devices. The majority of organizations offer far more than one app, the average is eight apps per company. Branding is the most comprehensible reason behind this. Radio apps are leading, mainly because of known restrictions in available bandwidths and listeners who are used to the mobility of radio. But mobile video (TV) will definitely catch up in the near future with LTE networks offering fast connections. Visual radio is a widely discussed and already tested option in the broadcasting community how to react to the challenges of the merging media world while keeping radio attractive.

In general, there is no master strategy, although there are some compelling ideas and topics visible. For instance, offering live streaming is still the most important feature. Different approaches are seen in which functionality is added: podcast, news, playlists and EPG rank at the top, whereas the link to social networks, although given by some apps, does not meet expectations.

To compare on-air listening figures to app-related data, most of the organizations lack the right tools. This is one of the future challenges to improving the availability and quality of media data. Without knowing if and how the apps offered are used, development will remain in the dark.

As for layout and navigation, most of the apps rely on known features which are already being learned and used by the audience. Live and on-demand content is presented mostly by swiping, sometimes with drop down menus. The difference lies in how detailed an app presents additional information, like EPG data, a presenter's bio or news. The interesting thing is that only German radio apps offer weather and traffic news as an extra service! We found no other public service broadcaster doing this. The reason might be different legal situations and other approaches, especially to traffic information. The latter has become a business model for commercial firms in recent years.

Some new trends appeared only on the fringes of this study but are still worth mentioning.

The use of dynamic websites mainly created with HTML5 instead of developing special apps is starting to gain pace. This trend might reduce the number of extra programmed apps in favour of specially designed websites, which will reduce the investments by broadcasters.

Parallel to this, so-called national radio players are gaining attention, for instance in the UK, France and Switzerland. These applications offer all the online available radio programs of one country - public service and commercial radio stations - thereby excluding somehow the thousands of Internet radio platforms also available worldwide.

Furthermore, there are moves and ideas on how to counteract some of the growing aggregation platforms like Spotify, TuneIn, even YouTube. Quite a few EBU Members are trying a dual strategy: they establish their own channels on these platforms and then enforce their own branding.

In the end, it is all about branding but even more important is really good content, in short: an attractive radio program is essential. Radio still has a unique USP, which is live shows,

skilled presenters, and surprising and competent selection of content. In this context apps are one of many ways to reach and even to increase the audience share.

All market observers expect one major trend: the sales figures of smartphones and tablets will rise continuously during the next few years. Being connected constantly is now one of the main traits of society, making listening to radio via mobile devices even more attractive. But the question is about reliability and costs. Today all the apps analyzed in this survey get their radio signal via streaming. Being in range of a WiFi connection ensures good reception at no additional costs. But as soon as there is no WiFi, the data are streamed via a mobile network (GSM, G3, LTE). An average radio listener would consume 2.2 GB per month (without any videos played), and not many data packages do cover this amount of data. In other words, users have to pay (more). A recent survey in Germany shows very clearly that consumers are aware of the potential costs of streaming radio outside WiFi, so they do not do it - for now.

Additionally, mobile networks do not cover all areas. Coverage in the countryside might be weak, and especially in a car or train, the network breaks up regularly, which does not make for a good user experience. Furthermore mobile networks get congested in traffic jams or emergency cases already today.

The solution consists of broadcast chips in mobile devices, technically connected with already existing radio apps. This would offer consumers cost-free listening to radio - and open up new business models for broadcasters and mobile network operators using the Internet as a non-linear back channel. This is a win-win situation for everyone because the consumption of radio will then grow rapidly. Apps will pave the road to this goal.

5.0 LIST OF GRAPHICS

Taking the latest studies into account, which show a rapid increase in time per day of Internet use (up to 169 min., ARD-ZDF online study 2013), combined with the steep rise in mobile devices on the market, broadcasters are definitely trying to cope with these developments by putting resources into apps and mobile performance of their content. Of course, political, legal and financial conditions differ throughout Europe, but the general goal is to reach audiences in this convergent world as well - taking into account not only the growing number of available devices for consuming radio, but also the platforms on which listeners communicate. Most of the apps analyzed use this knowledge and connect their radio mobile program with social networks.

p.4: Number of apps identified

p.5: Apps offered

p.6: Interactivity

p.7: Total apps identified by platform

p.8: Total apps identified by source

p.10: Key objectives

p.11: Technology used

p.11: Developers

p.13: Number of app downloads in 2012

p.14: IOs statistics

p.14: Android statistics

p.14: other statistics

p.15: Content management

p.16: Availability of radio content

p.17: Interaction with the audience

p.86: Planned improvements

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p.89: Aggravators used

p.90: Reasons for not using aggravators

p.91: Top features

p.92: 2012: amount spent on developing apps

p.93: Expectations

6.0 IMPRESSUM

PLANET OF THE APPS

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L'Ancienne-Route 17A

1218 Le Grand-Saconnex

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www.ebu.ch/euroradio

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HEAD OF EURORADIO

Dr. Christian Vogg

vogg@ebu.ch

RADIO ASSISTANT

Sibylle Förster

foerster@ebu.ch

RESEARCH ASSISTANT

Nicolas Favrod-Coune

favrod-coune@ebu.ch

BRAND MANAGER

Amélie Rossignol-Farjon

rossignol@ebu.ch

7.0 ANNEXES

Please click on the links below to access the documents:

[7.1 ANSWERS ON CONTENT AND STRATEGIC ISSUES](#)

[7.2 ANSWERS ON TECHNICAL, DEVELOPMENT AND
STATISTIC ISSUES](#)