

The crisis in youth radio consumption in Catalonia

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Abstract

For approximately a decade, traditional Catalan and Spanish radio has been noting a gradual loss of radio penetration among the population's younger segments. This phenomenon, which is affecting most developed countries, is closely related to the development of ICTs and communication networks. This paper aims to examine the causes of this crisis by studying broadcast radio reception among young people aged 14 to 24 and living in Catalonia.

Key words

Conventional radio, youth, the internet, digital environment, reception studies.

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Resum

Des de fa aproximadament una dècada, la ràdio convencional catalana i espanyola ha detectat una pèrdua progressiva de penetració del mitjà entre els segments més joves de la població. Aquest fenomen afecta la majoria dels països desenvolupats i està relacionat fortament amb el desenvolupament de les TIC i les xarxes de comunicació. L'objectiu d'aquest article és aprofundir en les causes d'aquesta crisi a partir de l'estudi de la recepció radiofònica dels joves de 14 a 24 anys residents a Catalunya.

Paraules clau

Ràdio convencional, joves, internet, entorn digital, recepció.

1. Introduction

As noted by the General Media Study (*Estudi General de Mitjans* or EGM and the *EGM Ràdio Catalunya*),¹ young people aged 14 to 24 in Catalonia have been listening less and less to the radio for a decade. This loss of audience is a phenomenon that also is playing out throughout Spain in general and even in other international markets, which concerns both public and private operators (EBU-SIS 2008 2-3).

A thorough examination of radio's role in the new digital environment must be undertaken if it is to survive; otherwise, its future is unclear (Tacchi 2000, 289-298). This process is key

to developing strategies aimed precisely at reuniting the media and the youngest listeners, obvious examples of a new kind of consumer who is increasingly mediated by communication technologies (FUNDACC 2009b); (Tabernero, C.; Sanchez Navarro, J.; Tubella, I. 2008, 273-291).

This article presents the most significant conclusions drawn from the *Informe sobre la Ràdio i els Joves. Problemàtica actual i tendències de futur* (Report on the radio and young people. Current issues and future trends), prepared by the Observatori de la Ràdio a Catalunya (GRISS-UAB),² the result of an collaborative research agreement signed by the Associació Catalana de Ràdio (Catalan Radio Association-

ACR) with the support of the Catalan Government's Department of Culture and Mass Media.

The scope of the object of study in Catalonia was the degree to which the radio ecosystem has developed in relation to other markets in Spain on the one hand, and the international recognition that public Catalan radio has received because of its level of experimentation and innovation on the other. The study's main intentions can be summarised by the following points:

- To explore and identify the parameters that define the current relationship between young Catalans and conventional aerial radio
- To investigate and verify young people's expectations of the radio medium in Catalonia
- To analyse young people's current radio use and consumption habits within the new media context
- To determine the short- and medium-term opportunities that new technologies are offering for incorporating young Catalans into the radio audience through both terrestrial and online radio
- To propose measures Catalan radio stations can take to boost radio consumption by this population sector

To achieve this, we have constructed a methodology that combines quantitative and qualitative parameters. In relation to the former, we have analysed data from the 1996-2008 calendar years provided by the Asociación para la Investigación de Medios de Comunicación or AIMC (Mass Media Research Association) in the *EGM and EGM Catalunya Ràdio*, a private body responsible for publishing a follow-up of the State radio offer in Spain, as well as the results for the 2008 calendar year of the *Baròmetre de la Cultura i la Comunicació* (Culture and Communication Barometer) by the Fundació Audiències de la Comunicació i la Cultura or FUNDACC (Culture and Communication Audiences Foundation), in which the major operators take part and which defines the Catalan population's media diet. Both studies are benchmarks for Catalan radio programmers and have provided us with a snapshot of the audience's evolution in quantitative terms. In order to complement, further examine and detect trends in youth radio consumption

in Catalonia, we also designed a telephone survey in which 1002 subjects³ distributed throughout the region of Catalonia participated; the sample was based on indicators from the Idescat (Statistical Institute of Catalonia) corresponding to the distribution of the region's 14- to 24-year-old resident population in 2007.⁴ In this sense, our survey addresses the gender perspective that is not included in the benchmark studies that measure the Catalan radio sector's audience, although it does not examine the influence of its socio-economic aspects.

The resulting sample appears in Table 1. Although an important factor was representing the young Catalan population as a whole, the subsequent exploitation of the data revealed no significant differences between provinces.

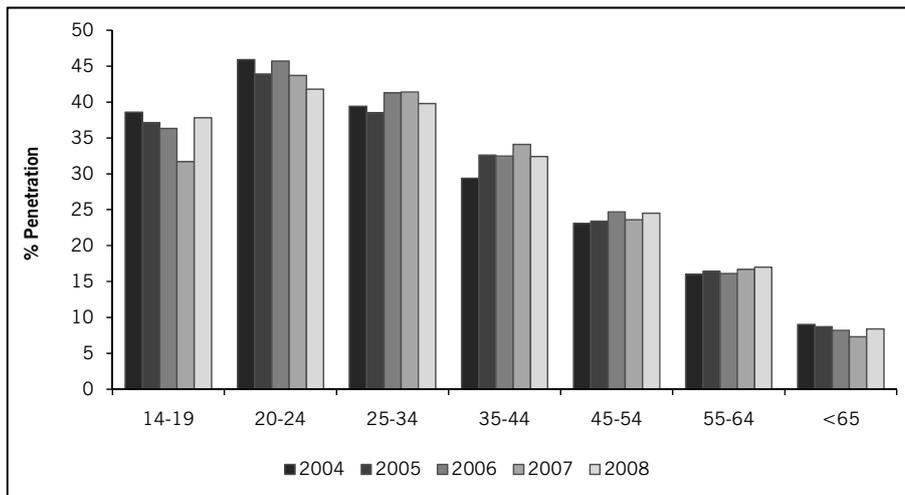
The qualitative side was approached from the perspective of reception by organising and conducting two focus groups (one with 14 to 18 year olds and the other with 19 to 24 year olds)⁵ that consisted of eight people each and focused on different age groups, since the circumstances surrounding them were quite dissimilar. The younger age group was composed of economically inactive secondary school students, while the older age group included university students, two of whom held jobs. Although the number of males and females in each group was supposed to be the same, there were five females and three males in the 19- to 24-year-old focus group; however, we believe that this imbalance does not affect the reliability or quality of what the group had to say about radio consumption.

In keeping with the Delphi method, the broadcasting viewpoint was achieved through a professional meeting with the eight heads of programming from the main public and private music channels operating in Catalonia, since data from audience survey studies suggest that this is the favourite programming model of young people of these ages. At the meeting, these professionals reflected on the medium's current status and brought to the table their particular vision of the youth audience's future. The Delphi's main themes revolved around the relationship between radio and the music industry, the involvement of new technologies in defining the medium's role in this new context and the profile of captive and lost listening audiences.

Table 1. Distribution of the telephone survey sample according to age group and province

	Males		Females		Total province
	14-18	19-24	14-18	19-24	
Total Barcelona	82	123	77	119	400
Total Gerona	42	61	39	58	200
Total Lerida	41	62	38	58	200
Total Tarragona	41	62	39	59	200

Source: In-house.

Figure 1. Trends in music radio audiences in Catalonia by age group, 2004-2008

Data: Percentage of the total horizontal universe. Cumulative audience from February to November, Monday to Sunday.

Universe: Persons 14 years old or older residing in Catalonia.

Source: Prepared in-house based on data from the EGM Ràdio Catalunya.

2. Radio in young people's imagery

Radio's symbiosis with music has deep roots among 14 to 24 year olds, although the focus group participants noted that they regarded the medium as being more appropriate for adult audiences. In this sense, the *EGM Ràdio Catalunya* revealed that the music radio listener's average age in Catalonia is currently around 38 years old,⁶ with the highest population segment share corresponding to 20 to 24 year olds (41.8% of all listeners), followed closely by 25 to 34 year olds (39.8%) and 14 to 19 year olds (37.8%), while fourth place was occupied by 35 to 44 year olds (32.4%). Music radio is clearly facing a steady loss of listeners in the youngest audience segments.

Nevertheless, music radio is still a prescriber of music, in line with the technology and gadgets available to the youngest listeners, as was mentioned within the context of the focus groups. These listeners commonly consult hit lists, usually online, as a resource for updating their own playlists. Thus, the radio provides very interesting information, while making it easier to research and then download the chosen tracks. However, this seems to be the online medium's only attraction, because these listeners do not consume podcasts, since they are unaware of their subject matter and view downloading them as complicated.

The discussion groups showed a lack of an emotional attachment to the radio, which, moreover, can hardly compete with the portable audio devices (MP3 players, MP2 players, iPods and mobile phones, among others) that allow them to manage content personally. This is these devices' most highly prized feature, compared with the radio, which offers a repetitive and unchanging continuum. Other studies have shown that MP3 technology is the favourite format for listening to music and

that radio is only consumed in certain situations (Albarran [et al.] 2007, 92-101).

3. The radio in young people's media diet

Young people's media and cultural consumption displays a marked trend towards new media and in general, the most modern technology (Arbitron & Jacobs Media 2007). Mobile phones are the most highly valued of all their devices because of their multiple uses, while traditional media such as television and radio are described as old. Young people's lives are increasingly being mediated by information and communication technologies (Livingstone 2002, 30).

Given this scenario, it is indisputable that radio's waning social penetration may be further aggravated by its audience's lack of rejuvenation. In fact, radio's presence in young people's media diet seems to be purely circumstantial and always comes after the internet and television in the main. The situation in Catalonia is very similar to that of other European countries, such as France, which saw penetration fall by 18.4% in the decade from 1997-2007, or Denmark, with even more alarming figures, given the 40% plunge in the 19- to 29-year-old audience in seven years (EBU-SIS 2008, 3). Aside from these examples, the panorama on the European continent is not too different from the one in the US (Arbitron & Jacobs Media 2007; Albarran 2007, 92-101).

What is happening in Catalonia? According to the research team's ODEC survey, 90% of the young people interviewed said they consume radio on a regular basis, preferably on weekdays (98.1%) rather than weekends (74.5%). While the *Baròmetre de la Cultura i la Comunicació 2008* also reflects this trend, it

found that 75.2% of the respondents listened to the radio on weekdays, compared with 24.8% on the weekends. This confirms that the type of radio use varies according to time of week, which is also true of other media (McClung et al. 2007, 103-119).

Anticipating this disparity in percentages between the two studies, which is the result of the respondents' perception of what they say they do and what they actually do, our survey requested specific information about the programmes they listened to most often - a maximum of three and in order of preference.

The responses to these questions allowed us to determine more accurately the distribution of young people's radio consumption during the week and their degree of recognition of the radio on offer. Regarding the first question, the most popular programmes fell mainly in the period from Monday to Friday (74.4%), as can be seen in Figure 2. This was followed by the weekly option (17.1%), i.e. programmes broadcast during the week that offer the latest sports news, in this case. The lowest percentage corresponded to the weekend (8.5%) with more varied types of content. With some data closer to the Barometer's, this confirms that young people listen to the radio more often on weekdays than on weekends.⁷ Our study did not reveal any attitudinal differences by gender and/or age group.

Music content rules young people's radio consumption, regardless of whether reception is by conventional aerial radio or online. At present, the internet option is still a practice with shallow roots⁸ and therefore circumstantial when deciding what to listen to. Aspects such as programme, D.J., time slot and others have little specific weight in determining audience, regardless of gender. Thus, music radio ranks above other types of programming (81.4% of all responses).

However, an analysis of our survey data shows that, aside from musical content, there are other areas that arouse a certain interest among this audience sector, such as news

(13.1%), comedy (12.7%) and lastly sport (11.6%). From a gender perspective, while the news reached a similar percentage of males and females, this was not true of comedy, which was preferred by more males (15.4%) than females (9.9%), or sport (19.6% for males and 3.2% for females). Following sports news and broadcasts is key to interpreting the presence of generalist radio among some of the favourite options, largely corresponding to males. Although participation showed an insignificant rate (3%) in the area of favourite content, it should be noted that this is the only area in which females (3.8%) scored higher than males (2.2%).

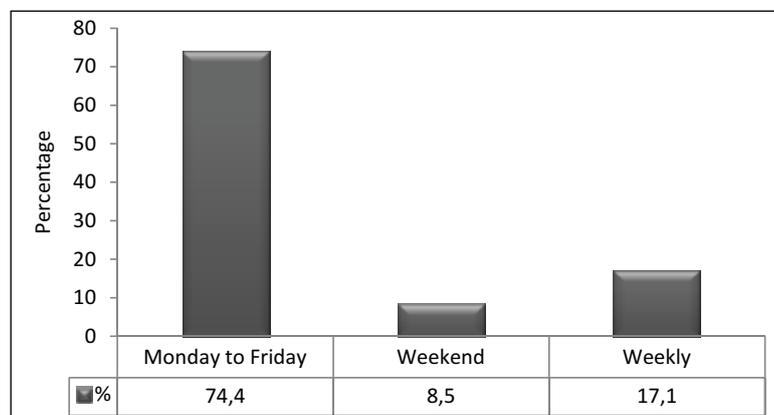
3.1. Quality of listening

The degree of recognition of the programmes, based on identifying the radio products young people claimed to consume, allowed us to verify the quality of listening for this sector of the audience. Table 2 shows the response rates for each option.

An analysis of these data points to trends not only in terms of what young people consume but also in terms of what their consumption is like. The fact that the percentages for correctly naming programmes are higher in the second (60.62%) and third options (48.07%) in relation to the first (40.10%) shows loyalty to very specific communication proposals that clearly belong to this audience sector's radio diet on the one hand, and a fairly undiversified youth consumption on the other, since most individuals found it hard to name more than two programmes correctly. Only 208 individuals were capable of naming a third programme.

In this sense, one aspect of particular significance is the percentage corresponding to the "Don't know/No answer" category (45% of the total), since the respondents were self-defined radio listeners. Their inability to provide a single piece of the most basic data - a programme name - enables us to assert that radio serves as background noise or accompaniment and that young people do not listen to it very attentively.

Figure 2. Weekly distribution of the 14- to 24-year-old Catalan audience according to favourite programme



* The sum of the values is greater than 100% because one individual can be in two or more categories.

Source: Radio and Youth Survey (The OBS and ODEC, 2009).

Table 2. Recognition of radio programmes by 14- to 24-year-old Catalans, 2009

Programme of recognition	Correct responses	Total responses	Recognition rate
1st option	399	995	40.10%
2nd option	234	386	60.62%
3rd option	100	208	48.07%

Source: Radio and Youth Survey (The OBS and ODEC, 2009).

3.2. The evolution of the youth audience

As for the dynamics of young Catalans’ radio use and consumption, 90% of the young people who participated in the ODEC survey stated that they listened to conventional radio mainly on private transport (79.5 %), at home (70.4%) and, to a lesser extent, on public transport (30.5%) or at work (15.3%). Consumption while travelling by either public or private means was very common.

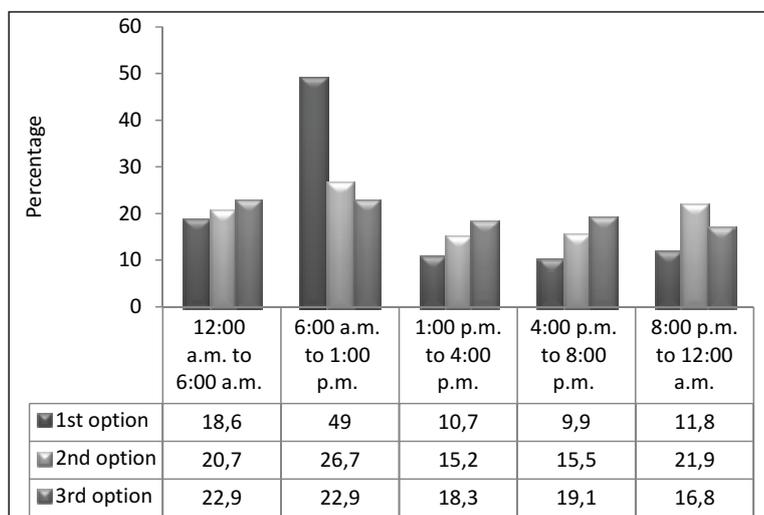
According to the *Baròmetre de la Cultura i la Comunicació 2008*, 45.1% of young Catalan listeners devote “3 to 6 hours” to media consumption in general and 23.1% said they spent “six hours or less”. Consumption is lower within this framework, as the ODEC survey reveals. A total of 42.7% of the respondents said that they listened to the radio between 15 minutes and 1 hour a day on weekdays, followed by 25.3% who said they spent 1 to 2 hours doing so. As for the weekends and holidays, the former variable is 28% (14.7 percentage points lower), while the latter is 20.7% (4.6 points lower). Although the distance between the two options is narrower during the weekend, a significant proportion of young people recognise that they spend less than an hour a day listening to the radio.

Matching correctly named programmes to their broadcasting slots allowed us to conclude that the morning slot (6:00 a.m. to 1:00 p.m.) is the time of day with the most young listeners in general. In other words, morning programmes are the most popular among young people who admit to listening to the radio, a trend that corroborates the general data in the *EGM Ràdio Catalunya* and the *Baròmetre* benchmark studies. However, an analysis of the ODEC survey allows us to observe several other interesting aspects.

According to Figure 3, with the exception of the morning slot (6:00 a.m. to 1:00 p.m.), the other slots are less popular, although popularity rises slightly at night (8:00 p.m. to 12:00 a.m.) and in the early morning (12:00 a.m. to 6:00 a.m.), even though the incidence varies according to option. However, it should be recalled that only 100 people were able to name a third programme correctly.

Our data confirm the highlights in the *EGM Ràdio Catalunya* and the *Baròmetre*, as we explain below. The distribution curve for total cumulative audience according to time and programming type from February to November 2008 (*EGM Ràdio Catalunya*) indicates that each type of programming reaches a second peak audience at different times of day. For music

Figure 3. Distribution by time slots according to 14-to-24-year-old Catalans’ three favourite programme options, 2009



Source: Radio and Youth Survey (The OBS and ODEC, 2009).

radio, this falls between 5:00 p.m. and 7:00 p.m., while for news, it falls between 9:00 p.m. and 11:00 p.m. As for the generalist radio, the second peak begins around 11:00 p.m. and ends at 1:00 a.m.

According to the *EGM Ràdio Catalunya*, young listeners' general consumption habits do not differ greatly from the radio audience as a whole, when time slot distribution is compared with favourite programmes (see Figure 3, the time slot distribution reference for the three options). A comparison between the two results seems to underscore the notion that the youngest segment's consumption is in line with the general audience's parameters.

The study conducted by the *Baròmetre* on young people and the radio furnishes other perspectives of the distribution of weekly radio consumption according to programming model. Firstly, 14 to 24 year olds primarily consume music radio during the day.

Secondly, music radio reaches its peak audiences between 9:00 a.m. and 1:00 p.m. and 5:00 p.m. and 7:00 p.m. Both of these time slots coincide with those in the *EGM Ràdio Catalunya*. It should be noted that this *EGM* refers to the audience as a whole.

Thirdly, percentages for the generalist radio remain steady throughout the day, overtaking music radio during two different time slots in the programming: from 8:00 a.m. to 9:00 a.m. and 11:00 p.m. to 2:00 a.m. The latter coincides with the sports programmes that Catalan radio stations began to air at 11:00 p.m. in 2008; national radio stations broadcast similar programmes at midnight. Except for night and early morning, the generalist radio fluctuates less than music radio does. On this occasion, the results once again converge with those from the *EGM Ràdio Catalunya*. In fact, at least as regards peak audience, 14 to 24 year olds follow the same pattern as other listeners.

4. The impact of new radio technologies on the radio/youth relationship

Immersed in technological change, young people are using today's communication devices and tools and have naturally integrated the internet, mobile phones and portable music players into their daily routine (Livingstone 2002, 15). But what about radio? Is conventional radio's waning young audience a result of a change in reception devices or new consumption practices with podcasts or on-demand listening?

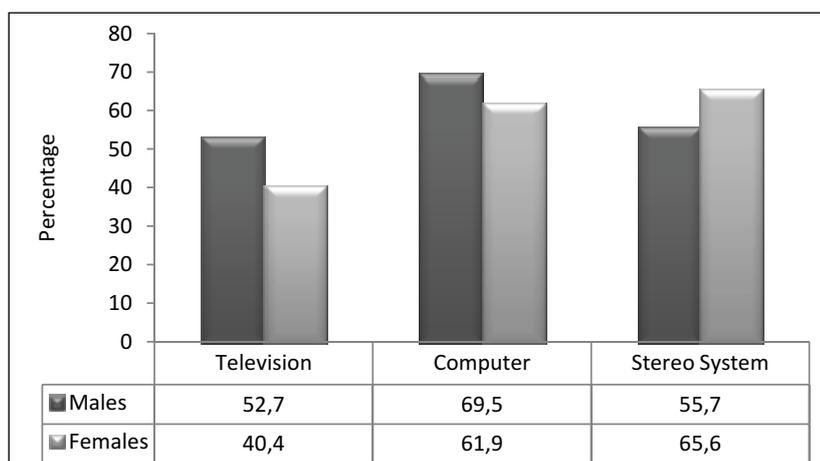
One possible cause for the slump in the youth radio audience which can be ruled out is related to access to reception devices, both analogue and digital, since 91.9% of respondents stated that they had at least one radio at home. Similarly, the penetration rate for DTT reached 84.3%. Both devices use radio signals.

There is a high penetration of stereo systems in homes in general (93.9%) and in bedrooms in particular (60.5%). Computers are also present in many bedrooms (65.8%) and, to a lesser extent, so is television (46.7%). However, the devices vary by gender, as shown in Figure 4, which shows the importance of computers to both genders on the one hand, and the relevance of stereo equipment in girls' bedrooms, on the other.

Although 92.9% of the sample said they listened to music at home, they also do so while travelling on either private (79.5%) or public (63.4%) transport. Individually used devices such as MP3 players are young people's main source of music (72.8%). In fact, 85.6% owned such a device and almost half of the respondents (49.9%) claimed to use it every day. Our data showed no significant differences between genders.

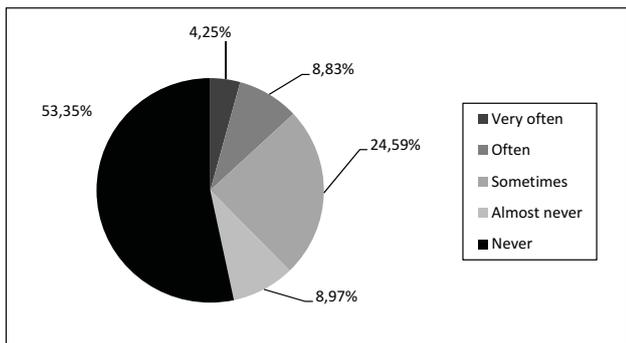
Car radios (73.4%) scored slightly higher than MP3-type devices as a source of music. Likewise, most private vehicles (63.4%) have CD players. It is noteworthy that nearly half the respondents, without significant gender distinctions, use

Figure 4. Devices in the bedrooms of 14- to 24-year-old Catalans, 2009



Source: Radio and Youth Survey (The OBS and ODEC, 2009).

Figure 5. Loyalty of visits to radio station websites by 14-to 24-year-old Catalans, 2009



Source: Radio and Youth Survey (The OBS and ODEC, 2009).

mobile phones to listen to music (45.2%), with 14 to 18 year olds (56%) more likely to do so than 19 to 24 year olds (38.1%). The high penetration of mobile phones in this population sector is overwhelming (98.1%), as is the percentage for internet access (97.9%). In fact, most young people consider the internet a device for leisure time (97.1%).

One prominent feature of the relationship between young people and the internet is their membership of social networks (72.9%) such as Facebook or MySpace. The balance clearly inclines towards females (79.6% of all female respondents versus 66.6% of the males). Around a quarter of all young people (24.1%) wrote blogs, although females (25.9%) were once again more active than males (22.3%). After crossing age and gender, we observed that 41.7% of all female respondents aged 14 to 18 maintained a blog (compared with 26.7% of the males this age). By segmenting the population into two age groups in the study, a pronounced difference in blogging between the younger segment (33.1%) and older age group (18.1%) can be seen.

Another interesting statistic is that 74% of the young respondents use P2P sharing networks such as eMule, eDonkey or Kazaa to download files of all kinds. Music is by far the most downloaded item (96.9%) from these networks, followed by films (63.6%) and software programs (50.4%). However, pay music downloads remain at 4.9%.

4.1. Online radio

According to radio operators, the internet is where the hopes of “capturing” the young lie. Thus, it is noteworthy that, according to the survey itself, over a quarter of all young people (27.6%) are unaware of the existence of radio station websites: only 72.4% could name a station with a web space. The results show that young men are more knowledgeable about websites (74.8%) than young women (69.9%), which may explain why fewer than half (46.7%) declared that they visit radio station websites and only 28% of these can be considered a loyal audience, describing their frequency as “often” or “very often”, as shown in Figure 5, however, with a higher proportion of males to females.

Regarding internet radio consumption, 35.6% of all young respondents could be considered cyber-listeners, compared with the 64.4% who still listen to conventional radio. Furthermore, internet listening can be described as sporadic (56.4% of bitcast consumers). It is alarming that the percentage of young Catalans who claim to listen to internet radio every day is no higher than 5% (4.62%).

In relation to the type of listening, 88.1% of online listeners say they listen to live programmes, 24.2% listen to snippets of songs or on-demand programmes and only 13.8% use podcasts (generically intended to mean downloading and listening later.) From the gender perspective, girls are more active in the different listening possibilities offered by the internet.

Online radio is mostly consumed on weekdays. In fact, 35.9% of those who listen to bitcasts state that they do not listen to them at the weekend or on holiday. The most common length of listening time ran from 15 to 60 minutes, both on weekdays (47.2%) and holidays (28%). This was followed by one- to two-hour sessions on weekdays (20.5%) and holidays (15.4%). Consumption of less than 15 minutes accounted for 11.9% of all listeners on weekdays and 7.9% on holidays. A total of 10.1% of all declared online listeners said they listened for more than two hours a day on weekdays and 9.7% stated that they listened for more than two hours when on holiday.

5. Radio appropriation according to reception type

Although the impact of online listening is still low and sporadic, we have compared its trends throughout the day with conventional radio, as shown in Figure 6. The sum of the values exceeds 100% because the options were not mutually exclusive.

The first observation is related to the strength and exclusivity of conventional radio during prime time in the morning time slot. This is when its leadership is uncontested, since although its dominance extends until 4:00 p.m., at the same time its percentage distance from online reception gets narrower. From early afternoon until early morning, 14 to 24 year olds’ radio

consumption combines conventional and online radio, although the latter has higher percentages and interesting nuances from the gender perspective. The afternoon time slot is females' favourite time for listening online (57.2%), while night is the time males prefer (51.6%).

This circumstance may be logical to some extent, since the possibilities for internet connection probably rise during the afternoon and night, as the school and/or work day comes to an end. It should be recalled that online listening takes place in a fixed site, since 88.7% of all young people who do so claim to use the modality to listen live and, therefore, probably from a personal computer.

Irrespective of the reception mode, most 14- to 24-year-old Catalans consume 15 minutes to 1 hour of radio Mondays to Fridays on average, as seen in Figure 7. As listening time increases, the percentage values fall in line with online reception. This is surprising since the stability required by an internet connection, which could lead to longer consumption periods, is not reflected in the data. Furthermore, online reception overtakes conventional radio when listening sessions do not surpass 60 minutes.

The most common length of listening time during the weekend remains from 15 minutes to an hour. Furthermore, conventional reception continues to outpace online listening, in keeping with the rest of the week. Yet overall, its influence drops, since 35.9% of the respondents claimed not to listen to internet radio on the weekend, compared with 6.4% on weekdays. No significant differences were seen in relation to listening time from the perspective of gender and age group.

Conclusions

In most developed countries, industrial research on radio audiences indicates a trend towards fewer young listeners; this is true in Spain as well. Furthermore, public and private operators

perceive this problem as hard to solve. Yet, at first glance, the data in our study may seem to contradict radio operators' benchmark studies on audiences and consumption, since one of our findings is that young Catalans **do listen to the radio**. What happens is that, in the main, they **do not listen on a daily basis and they listen sporadically**, primarily during the morning time slot (while going to school or work) or at night (at home), which reinforces the results of other studies conducted primarily in England and the United States (McClung [et al.] 2007 103-119).

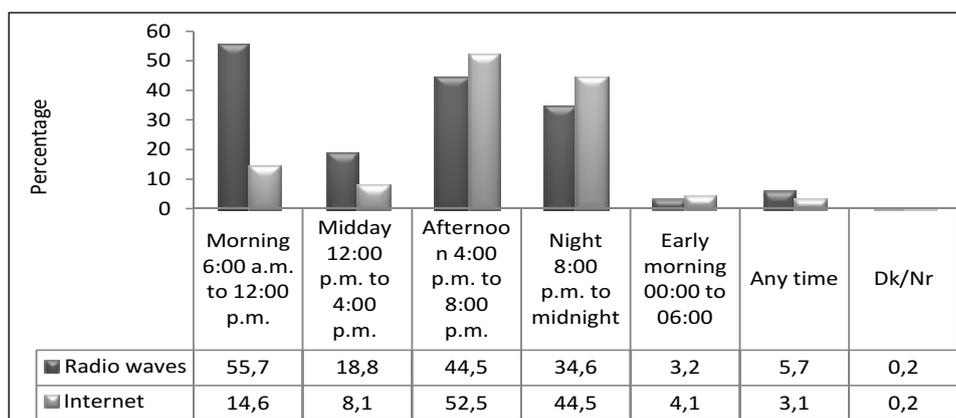
What is true is that although young people listen to the radio, **they are listening less**. But this is not just happening to radio; as a generational group, young people today tend to switch activities often and even multitask. One might say that, as a group, **they are multifunctional** and one consequence of this is the reduced attention span they devote to the tasks they perform. From this perspective, it could be said that what has changed is the quality of listening and programmers should take this into account, spoiled as they are by a kind of listening that takes place within an almost exclusive regime.

Coinciding with the benchmark studies, we observed that **music content is preferred** over others (sports, information, comedy, etc.) and logically, music stations and/or chains are also listened to most. This interest is reflected in music radio consumption, reserving generalist listening for sports content.

Within this context, the **emergence of the internet and young people's natural incorporation into the digital environment has exacerbated the crisis**. On the one hand, young people have devices at their disposal that capture conventional radio signals via radio receivers or DTT. On the other hand, they are technically equipped for exposure to online radio content, although the data demonstrate its limited impact. In this sense, conventional radio has limited uses at this digital stage (Albarrán 2007 92-101).

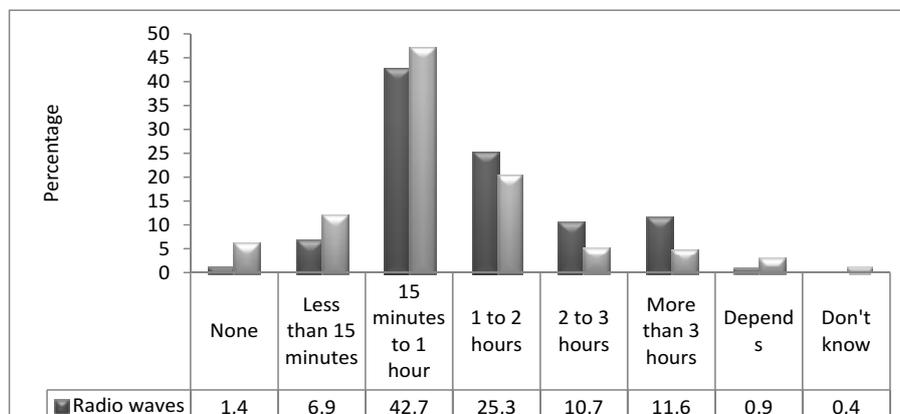
Radio is no longer emotionally close to young people. The **emotional disengagement** of 14 to 24 year olds from the radio,

Figure 6. Listening times of 14-to-24-year-old Catalans according to type of broadcast, 2009



Source: Radio and Youth Survey (The OBS and ODEC, 2009).

Figure 7. Radio listening times of 14-to-24-year-old Catalans by reception modality during weekdays, 2009



Source: Radio and Youth Survey (The OBS and ODEC, 2009).

reflected in the form of consumption, will have a short-term impact on general audience ratings. Radio has far to go but not much time to put together production strategies for new elements of service and identification. The youngest segment shows a depersonalisation; in surveys they are unable to recall the names of most programmes or their DJs; they therefore lack an imagery of personalities who predict their musical tastes, as was true of the 1980s and 90s.

Although it was not the aim of our study, it can be extracted from many of the data obtained that radio programming in Catalonia, as elsewhere, finds itself at a complicated crossroads. Young people don't become hooked to an overly conservative and highly automated musical programming. The hope lies in the internet, yet the merger with the internet must be filled with programming proposals that awaken interest and meet the expectations of new generations; from this perspective, gender and age will become fundamental.

Notes

1 The *Estudi General de Mitjans* (EGM – General Media Study), developed by the Mass Media Research Association (AIMC), has become the benchmark on media consumption by the Spanish population. Its data largely determine broadcasters' programme policies and strategies. Since 2003, the AIMC has conducted a specific EGM for Catalonia, *EGM Ràdio Catalunya* (25,000 personal interviews of Catalan residents over 14 years of age) divided into three annual waves.

2 L'Observatori de la Ràdio a Catalunya (OBS- Catalan Radio Observatory) is part of the Grup de Recerca en Imatge, So i Síntesi (GRISS-Image, Sound and Synthesis Research Group), a consolidated research group recognised by the Catalan Government (2009SGR1013 Group), and attached to the Department of Audiovisual Communication and Advertising at the Autonomous University of Barcelona.

3 Design of the survey by the OBS and developed by the specialist firm ODEC.

4 The last official census available when the fieldwork research was being conducted.

5 Participants were recruited by the VI-VA Comunicació firm and the research team was responsible for its dynamics and implementation.

6 According to data from the EGM and EGM Ràdio Catalunya, in 2001 the average age of the music radio listener in Catalonia was 34.5 years old. In the past seven years, there has been a progressive aging of the music radio audience, which reached 38 in 2008.

7 These premises are also verified by the *Estudi d'opinió pública sobre els mitjans de comunicació a Catalunya 2009* (The 2009 public opinion study of the mass media in Catalonia), prepared by the Catalan Audiovisual Council (CAC), which showed a lower radio consumption on weekdays (23.4%) than on the weekends among the 18- to 34-year-old population. See <<http://www.cac.cat/web/recerca/estudis/llicitat.jsp?MjU%3D&MQ%3D%3D&L3dIYi9yZWNIcmNhL2VzdHVkaXMvbGxpc3RhdENvbnRlbnQ%3D#>> [Consulted: 29 September 2009].

8 According to the *Estudi d'opinió pública sobre els mitjans de comunicació a Catalunya 2009* (CAC 2009) 18 to 34 year olds are those who most listen to internet radio. The sample population for this study was 18 to 65 years old, i.e., the 14- to 17-year-old population did not take part.

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