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**Paper No. 17**

# Deutsche Welle - AMIC Workshop

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Management of Change  
for Broadcaster

SYMPHONY

92.4 FM

FM

93.3

WARNA  
94.1 FM

The Singapore

RADIO  
95.8 FM

Industry

LOVE

97.2 FM

PERFECT 10

98.7 FM

Submitted By

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## Introduction

This paper discusses the current situation in the Singapore media scene and the challenges facing one of the oldest media in Singapore, the Radio Industry.

## The Radio Industry

Even though the first radio broadcast was made over 60 years ago, radio remains a relevant medium in the Singapore media scene. Each week, over 2.3 million Singaporeans (aged 15 and above) tune in to a radio station. In 1997, advertisers spent over S\$64 million on radio advertisements.

There are 18 radio stations originating from Singapore :

- (a) the Radio Corporation of Singapore (RCS) is a media company that owns and operates the largest radio network in Singapore. It has 10 FM radio stations catering to the multi-racial Singapore population and 3 international SW radio stations. It is estimated that advertisements on RCS stations account for almost 90% of radio's advertising pie.
- (b) SAFRA Radio is owned by the Singapore Armed Forces. It owns and operates 2 FM radio stations.
- (c) NTUC Radio Heart is owned by the National Trade Union Congress. It owns and operates 2 FM radio stations.
- (d) the National Arts Council, in collaboration with RCS, owns and operates the Arts Channel.

Singaporeans can also tune in to the BBC WORLD SERVICE as well as to a number of Malaysian radio stations.

It is estimated that another 3 radio stations will be launched in Singapore by the end of 1998 :

- (a) RCS will be launching 2 new radio stations and re-formatting one of its existing radio station. To cater to the growing needs of Singaporeans, a NEWS radio station will be launched by RCS. RCS is also expected to launch an International radio station - broadcasting in Japanese, German and French - to cater to the growing number of foreigners working and living in Singapore.
- (b) the Singapore Broadcasting Authority (SBA), which regulates the Singapore broadcasting industry, is expected to release a radio frequency that will broadcast financial news and information.

Some of the Malaysian radio companies are also expected to launch new radio stations before the year-end.

Hence, Singaporeans can expect to have more radio stations on their FM dial by the end of 1998.

## 2. The Media Landscape

To better understand the position of the radio industry in the Singapore media scene, one has to understand the influence of the different media :

### (a) **Newspapers**

All newspapers originating out of Singapore belong to the Singapore Press Holdings Limited (SPH). Each day, over 2 million Singaporeans read a daily newspaper. In 1997, advertisers spent over S\$644 million on newspaper advertisements.

(b) **Television**

There are 3 television companies in Singapore :

- the Television Corporation of Singapore (TCS) owns and operates 2 commercial TV stations (TCS 5 and TCS 8). Each day, over 2.2 million Singaporeans watched a TCS channel. In 1997, advertisers spent close to S\$390 million advertising on TCS channels.
- the Singapore Television Twelve (STV12) owns and operates 2 public service channels (Prime 12 and Premier 12). Each day, over 900,000 Singaporeans watched an STV12 channel. In 1997, advertisers spent around S\$53 million advertising on an STV12 channel.
- the Singapore Cable Vision (SCV) owns and operates the only cable TV network in Singapore. SCV is still in the process in wiring-up the country. Although initial take-up rate for Cable TV is not as encouraging as in other Cable TV countries, SCV is expected to make an impact on the Television Industry once Singapore becomes cable-ready.

3. **The Challenges Facing the Singapore Radio Industry**

Gazing into the crystal ball reveals the following for the radio industry :

(a) **Digital Audio Broadcasting (DAB)**

Experts predict that DAB will be the future for the radio industry. In Singapore, the SBA and the various radio network owners have been testing the implementation of the DAB system. It is widely expected

that the first DAB Multiplexer licence will be issued by the third-quarter of 1998 and Singaporeans can expect to receive the first DAB station by the end of 1998.

Various questions still surround the implementation of DAB in Singapore

- do listeners see the need for the DAB system ?
- how would advertisers allocate their advertising budget now that DAB will resolve the issue of radio's inability to provide visual advertisements ?
- given that the DAB has a greater bandwidth than the FM spectrum, which of the following will be the CORE benefit of the DAB system
  - : the provision of data and images ?
  - : the ability to provide more niche radio stations ?
- would more radio stations result in more revenue and more time spent on radio ?

(b) **Other emerging technology**

The Internet continues to challenge radio. Singapore Telecoms and Singapore Cable Vision are testing new media models where Singaporeans can have a wide spectrum of activities ranging from watching movies to shopping on the Internet.

However, I think the major threat to radio (and especially DAB) would be the Digital Terrestrial Television (DTTB). SBA has announced the testing of the service and intends to implement DTTB in Singapore in the very near future.

(c) **Singaporean Lifestyle**

Singaporean lifestyle is another factor that would impact on the Singapore Radio Industry. As Singaporeans spend more and more time on emerging media like Internet and Video-On-Demand, they will have less time for radio and other traditional media.

Hence, radio (and other traditional media) will have to continually reinvent to ensure that it serves the needs of the Singapore population.

(d) **The “face” of radio**

Radio has always prided itself to be an interactive medium - a medium that touches the “soul” of the listener.

DAB promises more radio stations than possible on the FM spectrum. From the past experience, new radio stations does not necessarily mean more revenue or more listeners - it only means more cost.

Hence, radio in a DAB era may take a new face - less DJ-listener interaction and more automation - in a bid to save cost and ensure profitability for the radio networks.

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*The research data for this paper was extracted from the following sources :*

- (a) *SRS Advertising Expenditure Report (December 1997)*
- (b) *SRS Media Index*
- (c) *SRS Radio Diary Survey 1997 (Wave II)*