

27

Strategy

for the Digital Age



Strategy **27**

Czech Radio
Strategy 27 for the Digital Age

Authors:

René Zavoral, Martina Májiček Políaková, Jiří Malina,
Pavel Šimoník, Jiří Hošna, Iva Jonášová, Martin Vojslavský,
Ludmila Süssová, Ondřej Nováček

Co-authors:

Kateřina Konopásková, Dušan Radovanovič, Jakub Čížek,
Ondřej Suchan, Jan Menger, Karel Zýka, Adam Javůrek,
Jan Misák, Helena Havlíková, Milan Pokorný

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Typography and type setting: Proximity Prague s.r.o.
Czech language proofreading: Milan Pokorný

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Foreword by the Director General of Czech Radio

**Dear listeners
and radio fans!**

Czech Radio will be celebrating one hundred years of its existence next year. It is an immense honour for me to be at the head of this public institution as it looks back upon its history, recapitulates important moments of its existence, the smaller and larger events it has witnessed, recalls the important personalities who have given Czech Radio its image, voice and soul, remembers the development of radio work over the past decades, and last but not least, also contemplates what it can bring to listeners and those interested in radio content in the next hundred years.



For me, Czech Radio is a young medium, a medium that is intimate and fast, always close to listeners when they need information, in moments of haste as well as rest, in moments of peace and fun, when they are looking for instruction, or want to spend quality cultural moments by listening live, listening to a recording of their choice on demand, or at one of the many events Czech Radio organizes. For me, Czech Radio is the most diverse medium of all, and I am fully convinced that it is also the most trustworthy for its listeners of all media currently operating in the Czech Republic. However, it also stands among the leading European public service media that respect the values of universality, independence and diversity, which see to social responsibility and promote innovation. Czech Radio also involves events of the Czech Radio Foundation or artistic ensembles from the Czech Radio Children's Choir

and the Disman Radio Children's Ensemble through the Symphony Orchestra to the Brno Radio Orchestra of Folk Instruments. Czech Radio consists of 25 radio stations headed by the flagship and market leader Radiožurnál, with nationwide stations Dvojka, Plus and Vltava, but also with digital and specialized stations, as well as regional broadcasting in each region of the country and the news server iROZHLAS.

However, to remain the most credible and most sought-after source of information and audio experiences for all residents of the Czech Republic, we must not stand still and must follow trends that move our work forward. Influenced by the digitization of all components of our society, the expectations and needs of the radio audience, and thus also traditional media such as Czech Radio, are reacting to this shift. The strategy you are now holding wants to show how Czech Radio is adapting to changes and what steps it wants to take in the future. That is why we have updated the mission statement and vision of Czech Radio to better reflect its contemporary role, not only as a media outlet, but also having a large part of its mission associated with the creation of audio experiences and cultivation of the media type. Our goal is not only to respond to technological trends, but also to create our own audio content trends in the Czech environment. In terms of independence, responsibility and universality, which are at the heart of public service media, we never lower our high professional standards of media work.

VISION:

Czech Radio wants to be a credible and irreplaceable source of information and an innovative creator of audio experiences.

I want to lead Czech Radio to be a partner to its listeners, one that stands up to global trends, while never turning its back on the

needs of listeners - from children to the elderly. In addition to providing relevant and trustworthy news service, it meets the needs of quality culture and inspiring entertainment. Therefore, the strategy of Czech Radio is to continue in strengthening the relationship of radio with listeners, and ultimately contribute to strengthening democracy and social cohesion.

Dear listeners and fans of radio production, in order to meet the needs of the public at 25 stations 24 hours a day, we must strive to ensure stable and sustainable financing to cover the needs brought about by the digital world. This entails not only the desire to update outdated media legislation, but also to increase the license fee by at least CZK 15 up to CZK 60 per month. Apart from its listeners, Czech Radio is mainly comprised of its employees and associates. Colleagues who are among the leaders in their field also need an adequate quality work environment to do their job and dignified remuneration so that they can develop in the radio environment and keep it at the top of audio production. In a corporate environment committed over time to decreasing emissions of the greenhouse gases it produces and acts responsibly towards the environment.

The past hundred years is really just the beginning for Czech Radio. Let me invite you along to the next hundred!

René Zavoral,

Director General of Czech Radio

MISSION STATEMENT:

We want to be a medium for one and all, so we are constantly increasing both the availability and accessibility of our services.

We make decisions in the best interest of the public, without political, economic or other influences.

We want to be trustworthy programme creators in accordance with the Act on Czech Radio, the Czech Radio Code of Ethics and strict journalistic principles.

We adhere to high professional standards, we inform – educate – entertain – bring culture.

We enrich culture with our own artistic activities. We broaden horizons, we help the public form their own opinions.

We have our own genre and opinion diversity. We address majority and minority audiences, whether in terms of social, national or other aspects (we are diverse in the selection of genres, opinions and people who work with us).

We are the driving force behind creativity and innovation in audio in terms of content and technology. We introduce exclusive formats that are the domain of the public service media.

We work in harmony with the principles of environmental sustainability, we can adapt to changes.

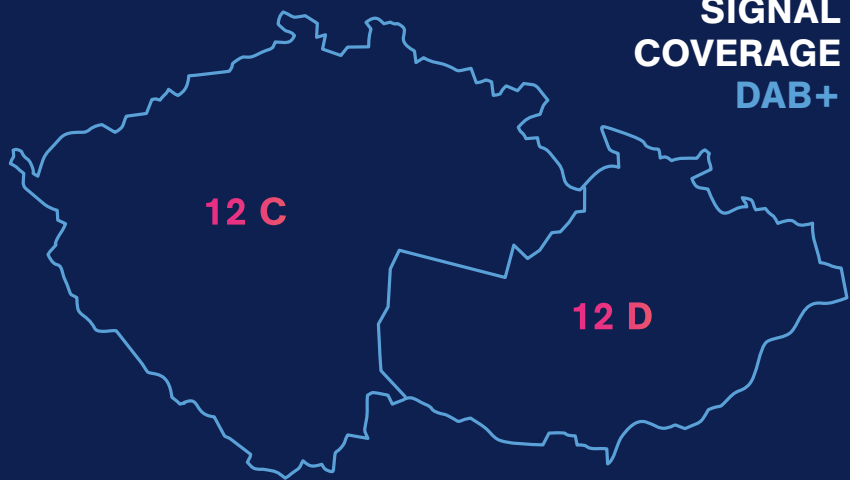
What are the media trends in the world and in the Czech Republic?

TRENDS AND CONTEXT

1



SIGNAL COVERAGE DAB+



HOW MANY CZECHS ARE CONNECTED TO THE INTERNET?



8 027 158
of 9 561 721

Source: NetMonitor – SPIR – Gemius, STEM/MARK March 2021, CSO, status as of 31 Dec 2019

HOW DOES INTERNET USAGE RELATE TO GENDER, AGE AND EDUCATION?

Internet penetration is 99 % up to the age of 44.

Elderly people are particularly lacking among Internet users.

Almost all university students (97 %) are online.

Using the Internet



8+
MILLION
Czechs



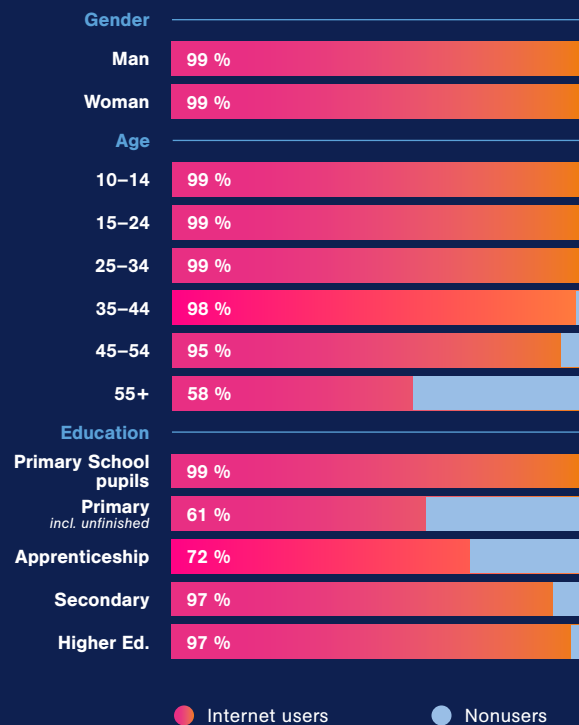
80%
Internet users browse the Internet on mobile devices (phone or tablet)

Daily reach of Internet media
NetMonitor is **6 MILLION** Internet users (74 %)



Most visited content category is **news**

99%
OF PEOPLE aged 10–40 use the Internet

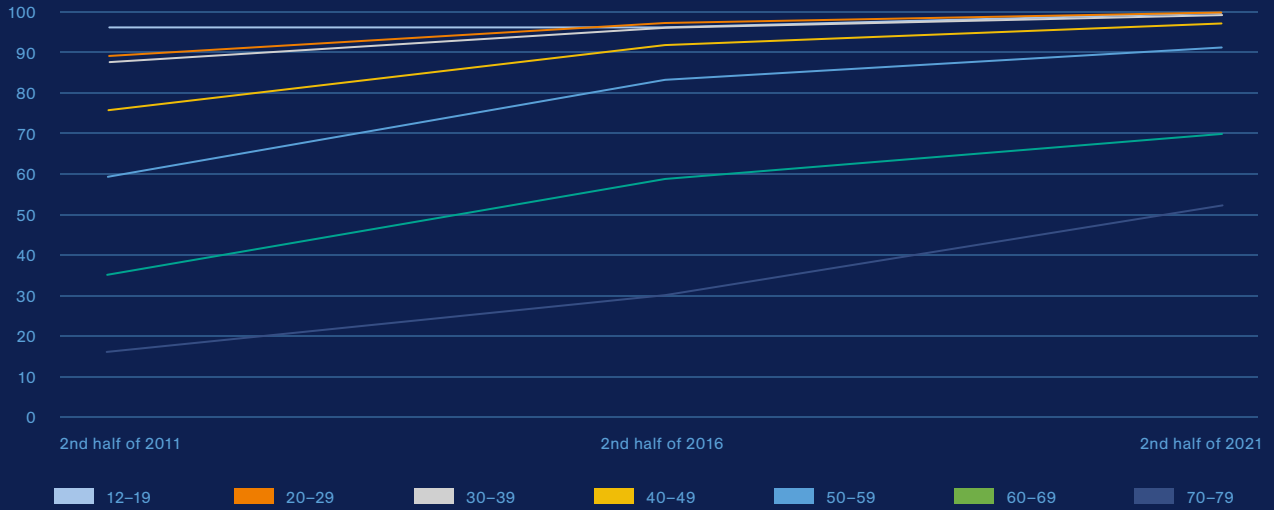


● Internet users ● Nonusers

Percentages of Internet users in individual sociodemographic groups; penetration of the Internet population in the real population of the Czech Republic, source: SEKV – SPIR, November 2020

SHIFTS IN SHARE OF INTERNET USE AT LEAST ONCE A WEEK

in age groups of the Czech Republic (data in %) in 2nd half of 2011, 2016 and 2021. Source: Radioprojekt.



AVERAGE TIME SPENT ON MEDIA IN EBU COUNTRIES – BY AGE

(hours, minutes - Q2–Q3 2021, Internet population aged 16–64)

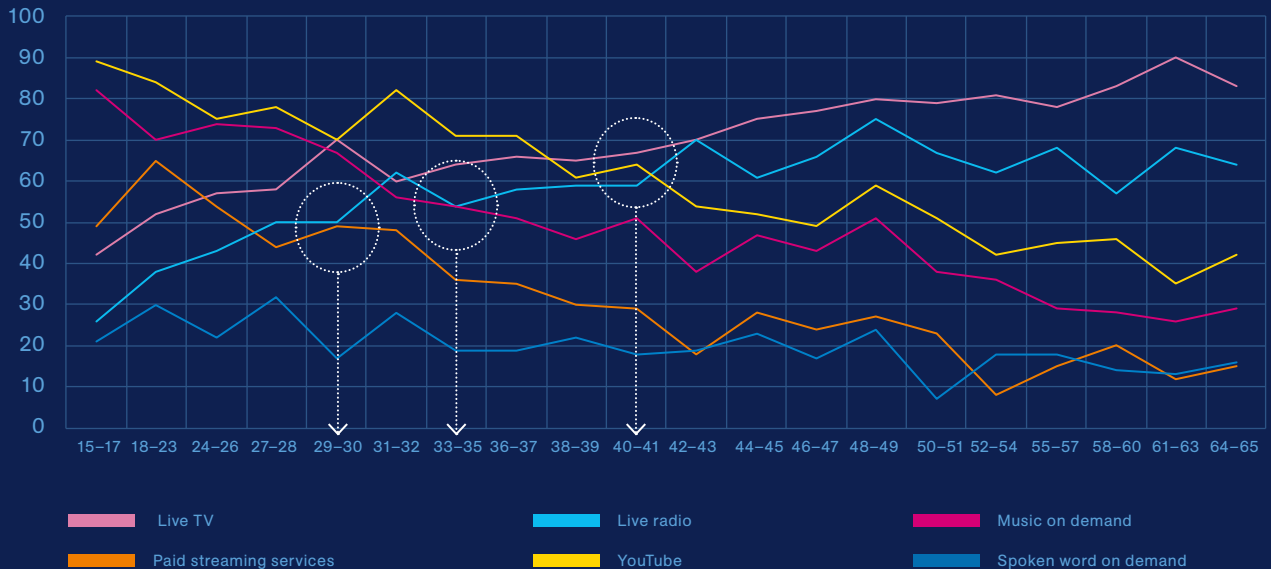
	Internet users aged 16–24	Internet users aged 25–34	Internet users aged 35–44	Internet users aged 45–54	Internet users aged 55–64
Listening to live broadcasts	0:38:00	1:06:00	1:16:00	1:22:00	1:17:00
Listening to podcasts	0:47:00	0:46:00	0:34:00	0:23:00	0:14:00
On music streaming services	2:03:00	1:35:00	1:04:00	0:41:00	0:25:00
On social media networks	3:04:00	2:33:00	1:54:00	1:28:00	1:08:00
Reading online news	0:00:49	0:57:00	0:49:00	0:38:00	0:31:00
Reading printed newspapers	0:34:00	0:37:00	0:31:00	0:26:00	0:22:00
Watching linear TV broadcasts	1:25:00	2:07:00	2:21:00	2:37:00	2:55:00
Watching TV online inc. streaming	1:16:00	1:22:00	1:10:00	0:55:00	0:40:00
On game consoles	1:13:00	1:10:00	0:49:00	0:31:00	0:16:00

Source: GlobalWebindex, 18 EBU countries: Greece, the Netherlands, Belgium, France, Spain, Portugal, Ireland, Italy, Romania, Switzerland, Austria, UK, Denmark, Sweden, Poland, Germany, Russia, Turkey.

TRENDS AND CONTEXT

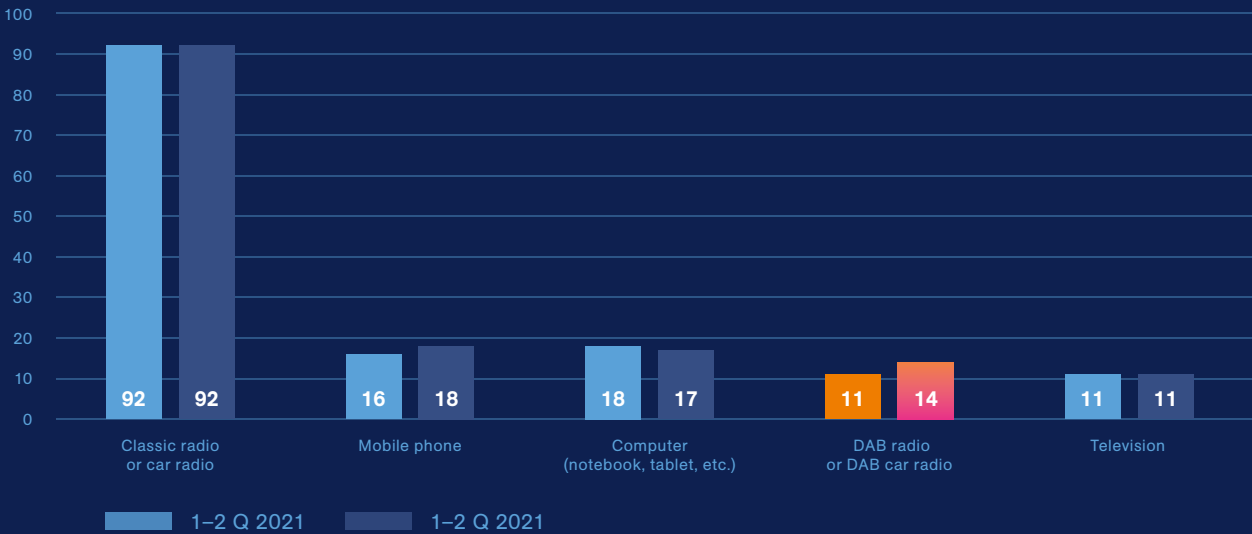
AVERAGE TIME SPENT WITH MEDIA IN THE CZECH REPUBLIC – BY AGE

Live radio broadcasting is always more common than on-demand talk radio. At about the age of 30, radio wins over streaming, at about the age of 35 over music on demand and at about the age of 42 over YouTube – Source: Simply5



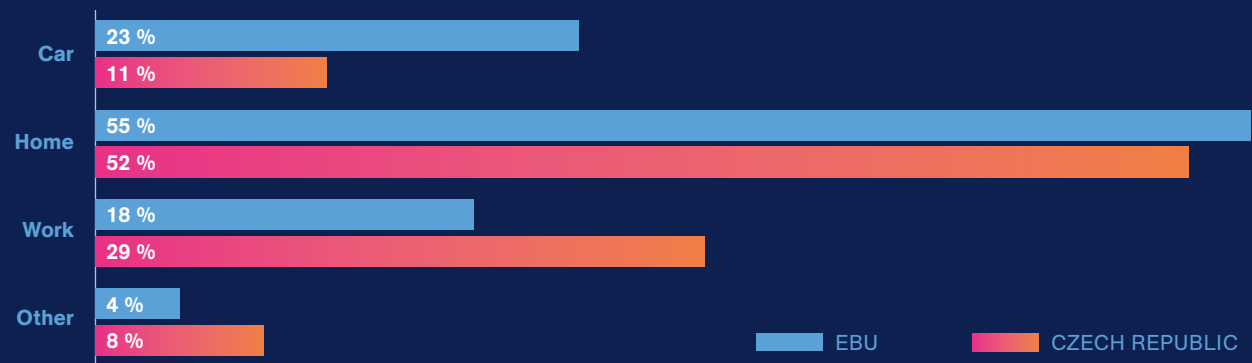
RADIO LISTENING VIA INDIVIDUAL PLATFORMS (YEAR-ON-YEAR COMPARISON IN %)

Listening via DAB has significantly increased year-on-year and is already used by 1,258k listeners (increase by 290k)
Source Radioprojekt.



RADIO LISTENING IN INDIVIDUAL PLACES – COMPARISON OF THE EBU AND THE CZECH REPUBLIC

Source: EBU MIS Audio in Cars, 2022; Radioprojekt 2022.

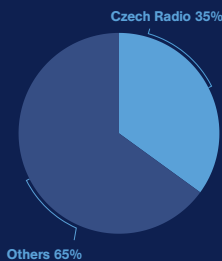


REACH OF CZECH RADIO (Q1 – Q2 2022)

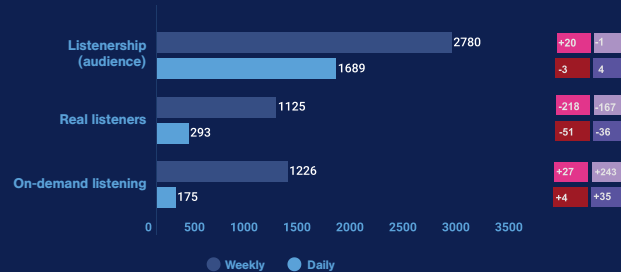
TOTAL CZECH RADIO REACH (modelled)

Modelled cross-section of Czech Radio live broadcast listenership, their on-demand content and Czech Radio internet services

3,150
individuals weekly



REACH OF CZECH RADIO IN POPULATION



According to the model, the Czech Radio reaches over 3.1 million people, which is 35% of the 12+ population. Market share decreased slightly to 26.8%.

Weekly listenership has recently increased. We are registering a significant year-on-year increase in on-demand consumption of Czech Radio content.

For real users, no comparison can be made with previous periods because as of 1/1/2022 it is not possible to measure the attendance of users who do not give their consent.

Czech Radio Rádiožurnál remains in the lead position of TOP 1 radio in weekly listening.

In daily listening, it remains the most listened-to station for a long time with a significant lead.

ATS relative

Average listening time calculated for all Czech Radio listeners

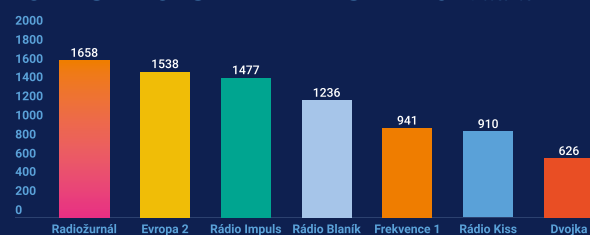
209 minutes

MARKET SHARE

Share of all listeners

26,8%

TOP 7 STATIONS WEEKLY LISTENING in thousands



CZECH RADIO TODAY

2



Czech Radio Today

NATIONAL CULTURAL INSTITUTION OF GREAT REACH

CZECH RADIO IS MORE THAN A MEDIA INSTITUTION

STATIONS & DISTRIBUTION

- Radiožurnál
- Dvojka
- Vltava
- Plus
- Radiožurnál Sport
- Radio Wave
- Rádio Junior
- Jazz
- D-dur
- Pohoda
- Region + 13x
- mujRozhlas.cz
- Více rádio
- iROZHLAS
- DVB T2

MOST LISTENED TO RADIO IN THE CZECH REPUBLIC

Radiožurnál
Český rozhlas

UNIQUE OWN PRODUCTION

158 K
BROADCAST PER YEAR HOURS

50
BROADCAST PER YEAR PLAYS

9
NUMBER OF FOREIGN CORRESPONDENTS

81
PRODUCED PER YEAR MUSIC STUDIO RECORDINGS

132
BROADCAST PER YEAR LIVE CONCERTS

SOCIAL RESPONSIBILITY

světluška
světíme ve tmě

JEŽÍŠKOVA
VNOUČATA

EBU
OPERATING EUROVISION AND EURORADIO

Prix
Bohemia
Radio

SOČR
Symfonický orchestr
Českořeholnau

Radio Prague
International
Czech Radio

BROADCAST FM, DIGITAL & ONLINE

SIGNIFICANT REACH

209 MINS.
LISTENS
LISTENER AVERAGE
ATS RELATIVE

26.8 %
MARKET

35 %
POPULATION
Age 12-84

GROWING MARKET SHARE

2 780 K
WEEKLY LISTENERS

1 125 K
ONLINE
WEEKLY READERS

1 226 K
ON DEMAND
WEEKLY PLAYS

BALANCED FINANCING

46 %
COSTS
WAGES AND FEES

25 %
PROMOTION, DIGITALIZATION AND OTHERS

2.3 BILLION
COSTS

14 %
TRANSMITTERS

14 %
COPYRIGHTS

REVENUES

2.3 BILLION

2.1 MLD.
REVENUE
RADIO LICENSE FEE (CZK 45)

100 MIL.
REVENUE
BUSINESS ACTIVITIES
100 MIL.
OTHER REVENUES

SIGNIFICANT EMPLOYER

HPPI/FTE **1390**

EX **4000**

JOURNALISTS **517**

MUSICIANS **SOČR 100**

STRATEGY 27

3



Czech Radio – Strategy 2027

3.1 LISTENERS FIRST

Czech Radio must respond to dynamic changes in media behaviour and the transformation of the radio audience by regularly modifying the targeting of Czech Radio stations, their content offer and distribution method. An important source for mapping these changes will continue to be research data, applying the most modern tools available to measure the success of Czech Radio and the entire radio market.

3.1.1 LISTENER RESEARCH AND DEVELOPMENT

Since the COVID-19 pandemic, habits of the population have changed substantially when consuming media content in the European and Czech contexts. On the one hand, availability changes with time and new opportunities enabling media monitoring (labour market transformation, home office boom, new ways to spend leisure time, etc.), and on the other hand, new technological possibilities are appearing of access to media and their content variability. The digital era brings broader variability in the way we consume media, and thus significantly broader choices and preferences among the audience.

As a result, interest in traditional media declines, starting with print and ending with radio.

In reflection to these changes, Czech Radio will maximize the available data mapping the behaviour and expectations of current and potential radio audiences. In the future, the need to modify the programme, broadcasts and their targeting must be based on robust research enabling us not only to describe the existing state, but also to partially predict future listening trends. The key data source should be Radioprojekt, the national audio ratings research.

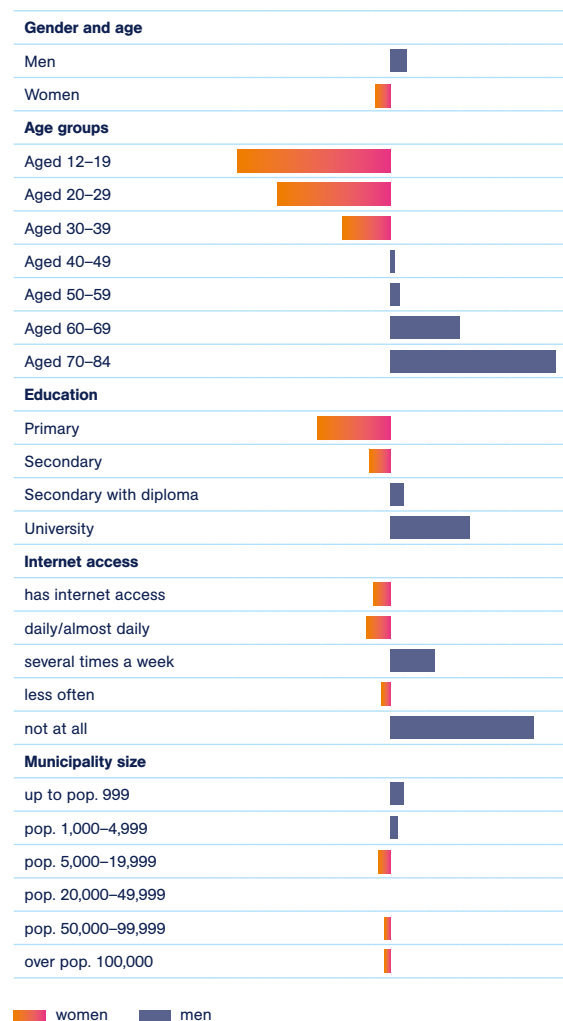
In line with contemporary European trends in EBU (European Broadcasting Union) countries, Czech Radio will strive to significantly modernise itself towards hybrid research integrating the method of surveys and passive measurement. The aim will be to provide more reliable, detailed and up-to-date feedback not only to Czech Radio as a whole, but also to its individual stations and listening platforms. Available data should be able to interpret the synergy of classic and digital broadcasting, live and on-demand listening and their overall reach, while drawing on more available sources (research

data, online statistics and so-called big data). For the purposes of the programme, communication and marketing, Czech Radio will continue to use a wide range of proven ad hoc research emphasizing reliability, speed and practical value. To ensure feedback on the performance of public service and on the overall perception of Czech Radio as an institution, Czech Radio will continue to conduct its own evaluation research (including a follow-up discussion of management with listeners) and utilize media credibility research from independent foreign and domestic sources.

Composition of daily Czech Radio listeners compared to the population of the Czech Republic aged 12–84

	Population		Listeners			
	Aged 12–84		Listening	Structure		
	1000	col. %	1000	row. %	col. %	INDEX
Population aged 12–84	8980	100 %	1689	18,8 %	100 %	100
Gender and age						
Men	4438	49 %	899	20,3 %	53 %	108
Women	4541	51 %	790	17,4 %	47 %	92
Age groups						
Aged 12–19	820	9 %	18	2,2 %	1 %	12
Aged 20–29	1082	12 %	72	6,7 %	4 %	36
Aged 30–39	1414	16 %	188	13,3 %	11 %	71
Aged 40–49	1741	19 %	335	19,2 %	20 %	102
Aged 50–59	1358	15 %	267	19,7 %	16 %	104
Aged 60–69	1288	14 %	340	26,4 %	20 %	140
Aged 70–84	1277	14 %	468	36,6 %	28 %	195
Education						
Primary	1478	16 %	163	11,0 %	10 %	59
Secondary	2847	32 %	466	16,4 %	28 %	87
Secondary with diploma	3016	34 %	614	20,4 %	36 %	108
University	1639	18 %	446	27,2 %	26 %	145
Internet access						
has internet access	7954	89 %	1340	16,8 %	79 %	90
daily/almost daily	7283	81 %	1197	16,4 %	71 %	87
several times a week	414	5 %	97	23,4 %	6 %	125
less often	257	3 %	46	17,9 %	3 %	95
not at all	1026	11 %	349	34,0 %	21 %	181
Municipality size						
up to pop. 999	1507	17 %	303	20,1 %	18 %	107
pop. 1,000–4,999	2026	23 %	395	19,5 %	23 %	104
pop. 5,000–19,999	1633	18 %	290	17,8 %	17 %	94
pop. 20,000–49,999	1145	13 %	216	18,9 %	13 %	100
pop. 50,000–99,999	662	7 %	120	18,1 %	7 %	97
over pop. 100,000	2007	22 %	366	18,2 %	22 %	97

Affinity of the Czech Radio audience community versus the population (population index 100)



■ women ■ men

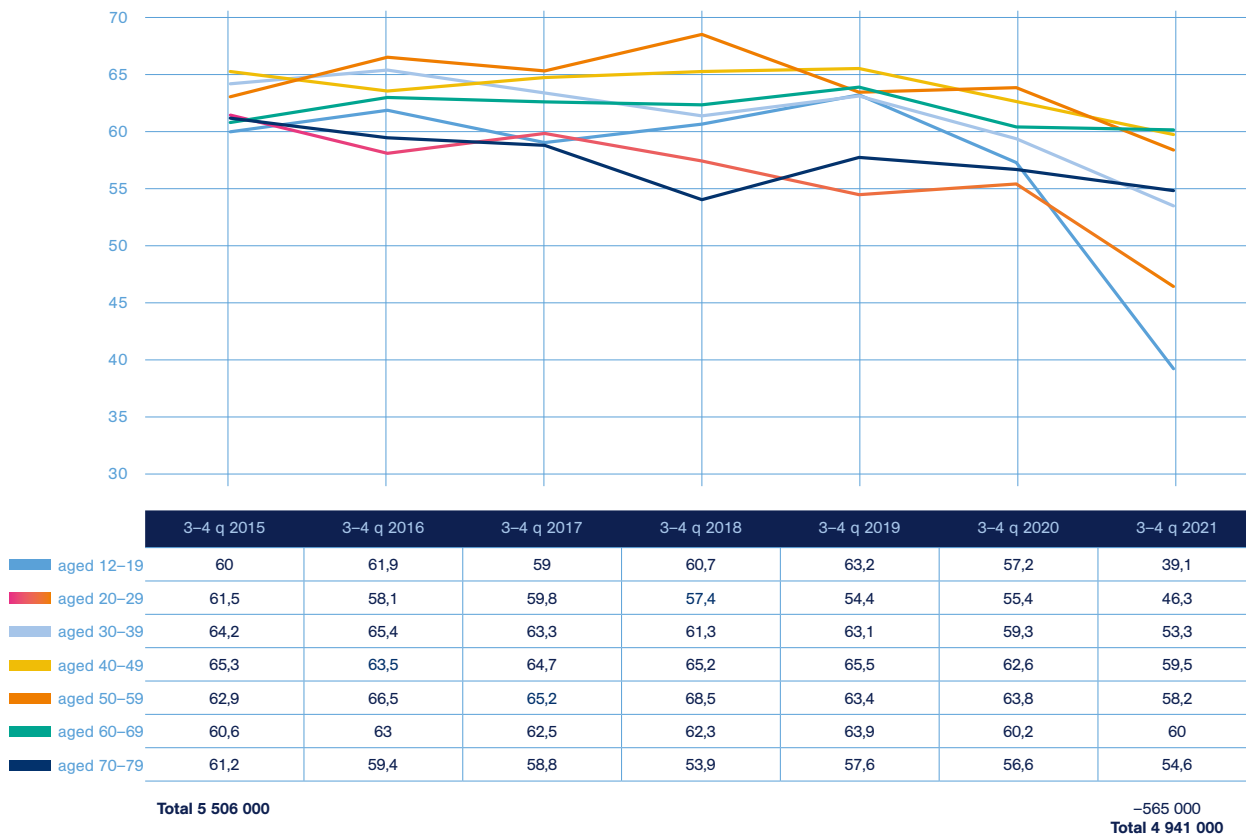
Composition of public radio listeners compared to listeners of all radios in EBU and the Czech Republic

Source: EBU Media Intelligence Service – Audience Trends: Radio 2022. Radioprojekt, 2022.

	Young 15–24	Young adults 25–35	Adults 35–59	Seniors 60+		Young 15–24	Young adults 25–35	Adults 35–59	Seniors 60+
Radios in total	13	15	44	29	Radios in total	7	22	44	27
EBU PSM	9	12	41	39	Czech Radio	2	15	44	39

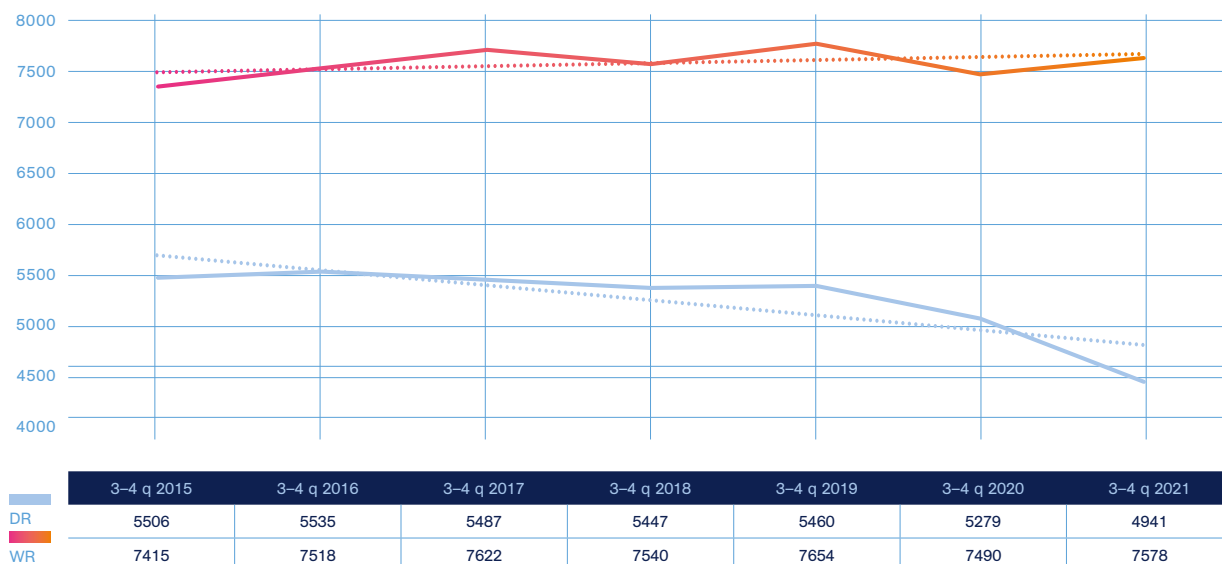
Development of radio reach of age groups of listeners (share of daily listeners in 2015–2021)

Data: Radioprojekt 2015–2021.



Development of radio reach of age groups of listeners share of daily listeners in 2015–2021.

Data: Radioprojekt 2015–2021.



3.1.2 CHANGES IN THE WAY OF LISTENING TO AUDIO

Czech Radio will have to face several challenges of society transformation by 2027 that are identifiable from trends of available data such as:

- natural demographic development – aging,
- loss of listeners under age 35,
- the turning point age for linear radio listening shifting to age 40,
- decreasing interest of younger age groups (up to age 35) in live broadcasting,
- limiting live radio listening to three situations – transport, work, home,
- growing preference for on-demand content consumption among the younger audience, shifts in the audience's musical taste.

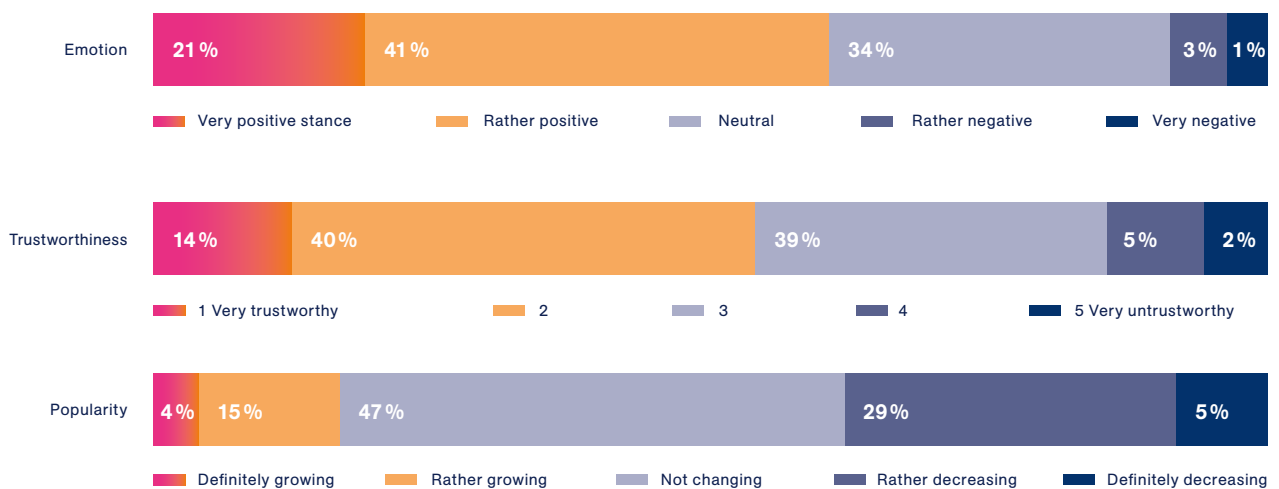
Czech Radio stations will have to gradually respond to these changes through programming changes, refreshing the music offer and revamping the way they distribute their content.

The focus of consumption of radio content will remain in live broadcasting despite the expected significant growth of on-demand production.

Live radio broadcast rating

All respondents.

Source: Simply5.



3.1.3 BROADCAST DIVERSITY AND AUDIENCE SEGMENTS

In the future, the broadcast of Czech Radio will be based primarily on loyal listeners of middle age (45–59) and senior age, who are undoubtedly an advantage in a competitive environment compared to commercial stations. The demographic process of natural aging will increase their role, but at the same time, it requires greater demands in satisfying their interests. Part of this traditional listening community will not only consume live linear broadcasts, but they can also be expected to adopt on demand listening habits (the age limit of using the Internet will shift more to senior age by 2027). Therefore, the key capability of Czech Radio will be to offer targeted content in the broadcasting of stations as well as online.

To remain a strong media house and ensure the natural generational renewal of the audience, finding ways to reach younger age groups will be essential. With regard to the expected shift in the age of arrival to live linear broadcasting down to age 40, it will be necessary to attract younger groups of the population primarily with a targeted offer of on-demand production and digital services (mobile apps). The core of listeners under age 40

will thus increasingly move to digital services, to unique on-demand content with significant use of the so-called third parties. This will also need to be adapted to the distribution of content of stations for young people – Radio Wave and Radio Junior.

To successfully address and maintain its audience, mostly differentiated by age and interest, the interdependence of Czech Radio stations and the gradual redistribution of audiences between them must work. Radiožurnál reaches the widest audience, including younger listeners (at the stage of building a family), and will continue to be the gateway to Czech Radio. From this, a segment of the listeners should gradually move towards broadcasts of Dvojka and regional studios, and eventually to the Pohoda station. Interest-profiled listeners (news, cultural, musical or sports) should be directed to Czech Radio specialized stations. However, even for them, synergy of listening to these stations with Radiožurnál, Dvojka or regional studios is expected in the future (the expected number of Czech Radio stations listened to will be around 1.5 per listener).



WHAT DOES
THIS MEAN FOR
CZECH RADIO
LISTENERS?

“Adequate content of our production in an optimally set distribution mix should be delivered to the listeners in order to meet the needs of the widest possible audience, as well as specific or minority target groups.”

*Pavel Šimoník,
Head of Research Department*

Example of project plan

Quality enhancement of Radioprojekt through the future hybrid fusion of the established existing methodology of general telephone surveys with modern electronic measurement of the cross-media type.



3.2 AUDIO FIRST

The functioning of media houses, including public service media, has been influenced by technological developments in the last fifteen years. Unlike private media, public service media do not follow the dictates of the market or the wishes of interest groups, including political ones, but provide the public with a pluralistic, imaginative and diverse programme offer. Technological progress also transforms people's wishes and behaviour, meaning that public media too must keep up with the times so that their services still remain relevant to the public. New content

distribution options and consumption means have been changing the decades-old perceptions of the radio market. The arrival of digital online services, especially on-demand listening, including multimediatization, spells new opportunities for Czech Radio to reach audiences and a challenge to be able to respond to the increasingly dynamic trends of the global market. It is no longer possible to focus on live linear broadcasting alone.

Through new technologies, Czech Radio primarily wants to enable listeners to listen to “their” programme anytime and anywhere they wish on various platforms. Audio always comes first at Czech Radio. Therefore, Czech Radio will build all its content and technological activities on a common basis, namely on audio. Audio is the basic building block for live broadcasting, but also for on-demand services and other platforms.

3.2.1 AUDIO FIRST PRINCIPLE

The goal on all platforms where people can listen to or consume the content of Czech Radio is first and foremost to increase listening. The aim of Czech Radio is to provide its programmes to as many people as possible on all available audio platforms.

Czech Radio’s linear terrestrial distribution is built around VHF (FM) broadcasting. In the next period, it will focus on improving the reception of DAB+ digital broadcasting, especially inside buildings. Another way to listen to Czech Radio’s linear broadcasting is through a selection of online IP / Internet listening, but this is mainly used by

listeners to access the extensive on-demand content of Czech Radio.

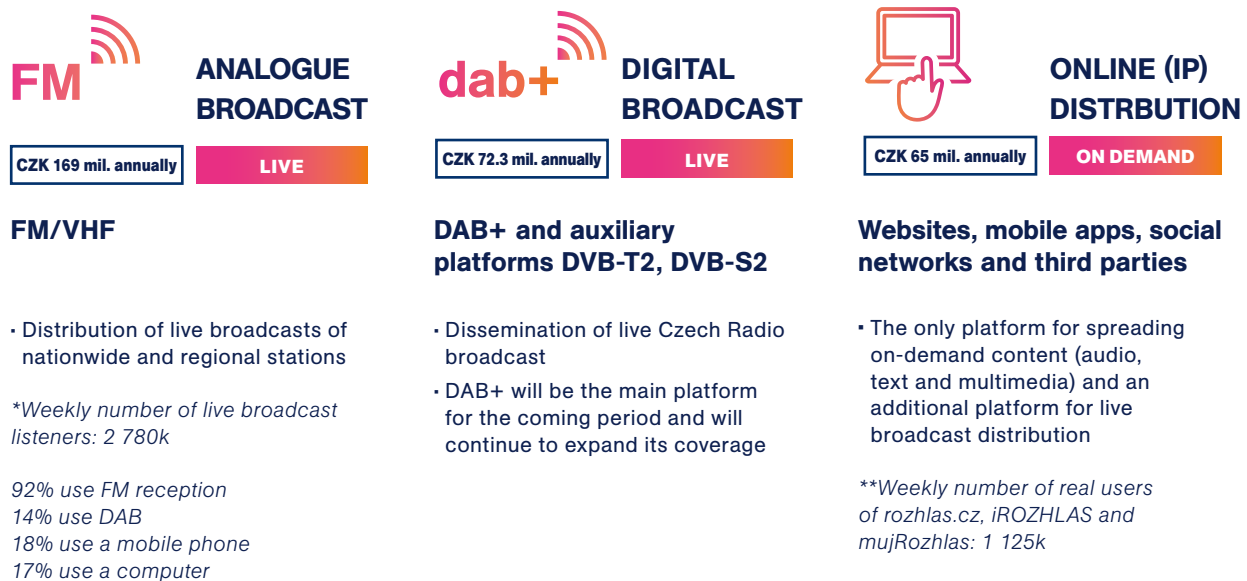
The priority for Czech Radio is to develop its own platforms in the online world as the main carriers of content in accordance with the Audio First principle, and thus maintain its distribution independence on social networks and so-called third parties (e.g., Spotify, Apple Podcast). These third parties serve Czech Radio in addressing new listeners who will be attracted to high-quality and interesting content. On social networks, Czech Radio focuses on building knowledge about its services.

3.2.2 WE ARE WHERE OUR LISTENERS ARE

Terrestrial broadcasting

Czech Radio will reach most listeners via live broadcasting of its stations, especially via analogue FM/VHF broadcasting or via DAB+ digital broadcasting with increasingly better coverage. In the coming years, the radio market will rather stagnate or decline. Nevertheless, it can be assumed that in 2025, live broadcasting will remain the predominant form of listening to Czech Radio.

However, changes will occur in the strength of individual distribution platforms. It can be expected that numerous listeners will gradually find their way to DAB+ digital broadcasting. Their number is growing every year, as is the penetration of the radios themselves with the possibility of receiving DAB+, especially when listening in cars.



Explanation:

The budget is linked to 2022.
The weekly reach of listeners and users concerns the 1st half of 2022

Sources:

* Radioprojekt: data for live broadcasting
**NetMonitor: data for real users

IP and Internet platforms

The Internet environment holds the greatest influence over current and future trends in audio content consumption. Global technology companies are creating platforms that set trends and influence user habits. Czech Radio must adapt its activities to these influences. Meanwhile, new technologies are enabling media houses with no experience in radio broadcast to create audio content.

This results in spawning a new competitive environment for Czech Radio.

Another trend that Czech Radio is responding to is the means of offering audio content on new platforms, e.g. Spotify or Netflix for video, which set the tone in on-demand consumption, suppress publisher brands and focus more directly on content.

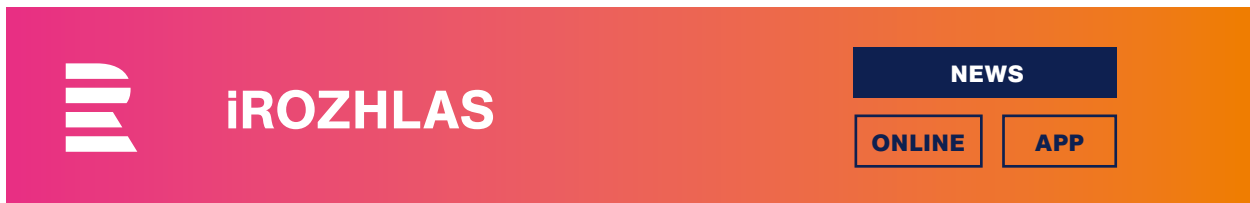
People are used to searching for specific content online rather than a brand or station of Czech Radio. Unlike the linear broadcast listener who is primarily identified with a station, the on-demand listener consumes a specific programme, and the distribution platform is only a means to an end for finding it. Thus, the digital online environment may lead to weakening the relationship between Czech Radio as a media house that creates content and its listeners.

Czech Radio will thus strengthen its online platforms in ensuing years: the audio portal mujRozhlas and the news server iROZHLAS. The goal is to prepare new, improved tools and continue to strengthen the consumption of Czech Radio content through its own radio platforms, because they offer the best availability of as much content as possible for listeners while they continue to build a relationship with the public media.



THE MAIN CONTENT PILLAR OF CZECH RADIO

- It also includes station presentations and special projects.
- The centre of all Czech Radio audio content, which will also be used by iROZHLAS and third parties.



NEWS SERVER

- Greater integration of news content from Czech Radio broadcasting and journalism from non-news stations.
- It puts greater emphasis on Czech Radio projects and promotion of Czech Radio brands.

Rozhlas.cz

ONLINE

INFORMATION ABOUT CZECH RADIO

ONLINE INSTITUTION

Serves as an institutional website and signpost.

Radioteka.cz

ONLINE

E-SHOP CZECH RADIO

ONLINE SHOP OF Czech Radio

Radio.cz

ONLINE

FOREIGN SERVICE

ONLINE FOREIGN BROADCAST SERVICE

Poplatek.rozhlas.cz

ONLINE

RADIO LICENSE FEE

LICENSE FEE ADMINISTRATION

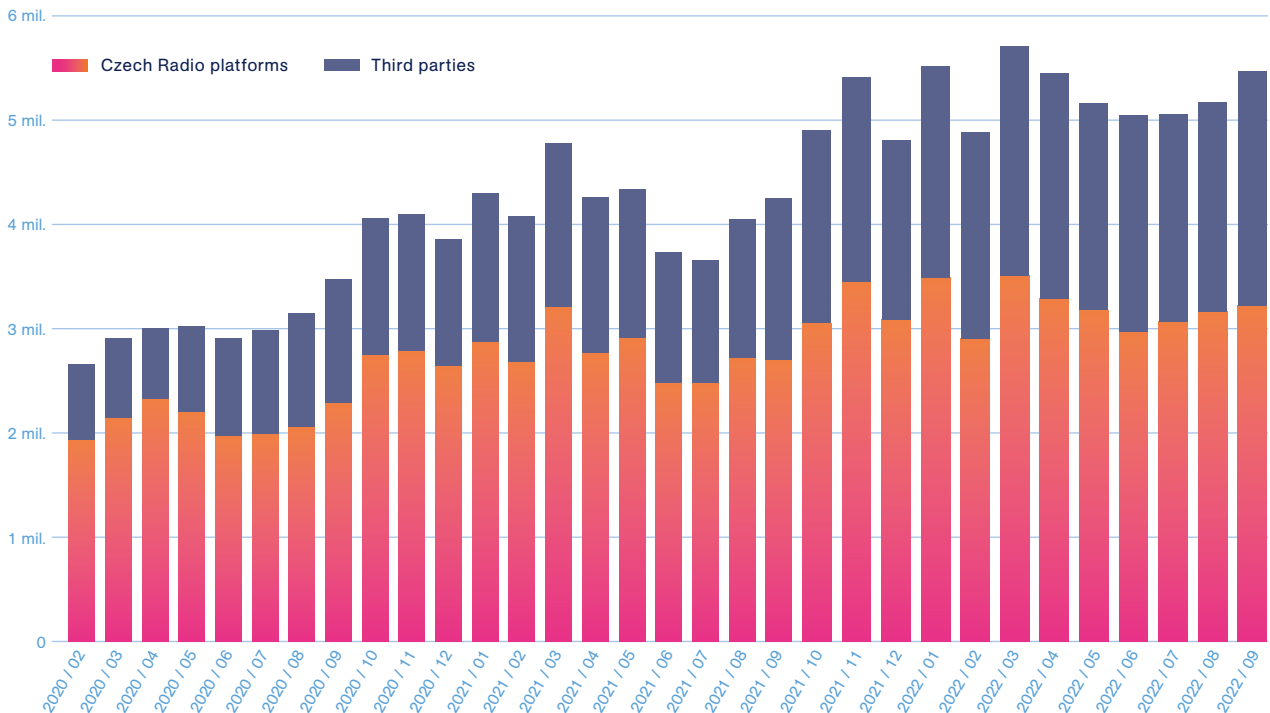
Third parties

Czech Radio wants to be a public service medium for all age groups and offer its content wherever people can tune in and listen to it. Therefore, it is and will be on the so-called third-party platforms, particularly in light of the huge popularity of Spotify, Google Podcasts, YouTube or Apple Podcasts, where over 50% of users in the Czech Republic consume on-demand content. Czech Radio will address its potential new listeners on these platforms who are not interested in live broadcasting or who do not use mujRozhlas. Meanwhile, it has no plans to distribute all its content to third parties or use it as a full-fledged audio archive.

Czech Radio. However, Czech Radio approaches them with caution and maintains a healthy ratio between audio content consumption on Czech Radio's platforms and on those of third parties (50% of the total number of plays). Though third parties can generate very high results in content consumption, they also bring risks. Czech Radio has no clear control over its content with them even though it has its established rules for redistribution. Therefore, it is not possible to consider third parties as platforms through which a full-scale public service could be performed.

These third parties are an important addition to the distribution mix of on-demand content for

Development of audio consumption of on-demand content on Czech Radio platforms and measurable third parties



*This graph shows the number of third-party plays that have detailed statistics (Spotify, Google Podcasts, Seznam.cz, YouRadio Talk and Apple Podcasts).

Czech Radio is the most widespread producer of audio experiences for all

Czech Radio wants to continue to be a credible and irreplaceable source of information and an innovative creator of audio experiences for everyone. Research indicates that linear listening to radio broadcasts dominates over on-demand listening by its selection of audio content for people over 36 years of age, and this boundary will shift upwards in the coming years. Thanks to a well-chosen strategy, Czech Radio intends to create and

offer digital audio on-demand services to younger generations so that they become a normal part of their lives and fulfill the role that linear radio broadcasting does for older generations. Knowing the audience's needs and Czech Radio's ability to adapt to them form the basic condition for providing services that result from its status as public service media.



WHAT DOES
THIS MEAN FOR
CZECH RADIO
LISTENERS?

“Czech Radio cannot fully perform a public service through third parties. Listeners will get the best on our platforms in linear FM or digital DAB+ radio, at the online audio portal mujRozhlas and the news server iRozhlas.cz.”

Jiří Malina, Director of Marketing and Digital Services

“In terms of DAB+ digital radio, our primary goal in the coming years is to increase the intensity and homogeneity of the signal in urban agglomerations, thereby improving indoor reception.”

Karel Zýka, Director of Technology and Administration

Example of project plan

In 2025, Czech Radio wants to fully replace the pillar rozhlas.cz with regard to audio listening and presenting station content with the pillar mujRozhlas.cz.

In case of a significant increase in penetration and improvement of indoor DAB+ coverage along with robust build-out of the 5G Broadcast network, we will consider reducing VHF distribution in the future.



3.3 WE THINK DIGITALLY

Currently, in the Czech and foreign environment, we are witnessing people's growing interest in so-called on-demand listening that releases them from a fixed broadcast time or programme of a favourite station, as well as allowing them to listen offline. The on-demand method is effective not only for people who are not interested in linear broadcasting and want to choose specific programmes according to their schedules, but is also quite suitable for formats or titles that require more focused attention, interactivity of listeners or

that appeal to the audience that prefers listening to digital on-demand content – podcasts. Czech Radio sees the creation and offer of on-demand content as a growth segment and considers its development key in reaching especially younger and new audiences, but also in retaining existing and older listeners who, as their digital and technological literacy increases, are expected to use on-demand content to a growing extent.

In recent years, the Czech environment has been going through a so-called podcast boom. New undertakings have entered the Czech audio market, a number of new projects have been created and audio has become attractive to new creators, institutions, brands and media, which never previously focused on sharing information and experiences via audio. The specificity of this area is a very rapid development. Therefore, it is essential for Czech Radio to be able to predict changes in the online environment and manner of listener consumption and react to them promptly.

That is why Czech Radio wants to focus on the development of digital audio content. For them, this means applying different optics in the creation and production of audio content, in its distribution and its evaluation among listeners. Czech Radio

already became an early new-millennium pioneer in the Czech environment of on-demand listening, and still wants to profile itself as an unmistakable innovator in terms of content, format and technology. It wants to be the largest producer of on-demand content based in the Czech online environment and reach various audiences, age and target groups, offering a variety of genres from news and public affairs through educational, musical and entertainment forums to literary-dramatic creation, all in high content and sound quality. It desires to contribute to the cultivation of the Czech podcast offer, to be a modern and strong medium that sets trends and can withstand the increasing competition for on-demand content in the online environment while developing its view to sustainability in the creation and publication of such content.

3.3.1 WE THINK LINEARLY AND DIGITALLY (TWO HEMISPHERES. TWO PILLARS)

So that Czech Radio continues to be capable of meeting the requirements of its listeners, as well as other uninvolved groups in society, a public service must be implemented through both linear and non-linear distributions, and the coexistence of linear broadcasting and audio content must be

created for on-demand consumption. Meanwhile, Czech Radio adapts the organizational structure and the process of developing content and formats, which was originally built exclusively on linear broadcasting.

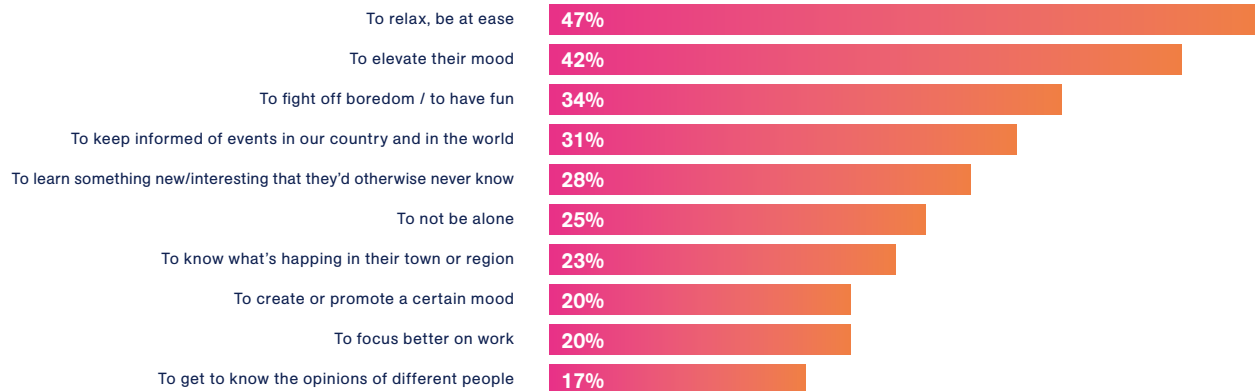
REASONS FOR LISTENING TO LIVE RADIO AND PODCASTS – CZECH REPUBLIC

Compared to live broadcasting, podcasts focus on deepening knowledge, learning and inspiration.

Source: Simply5.

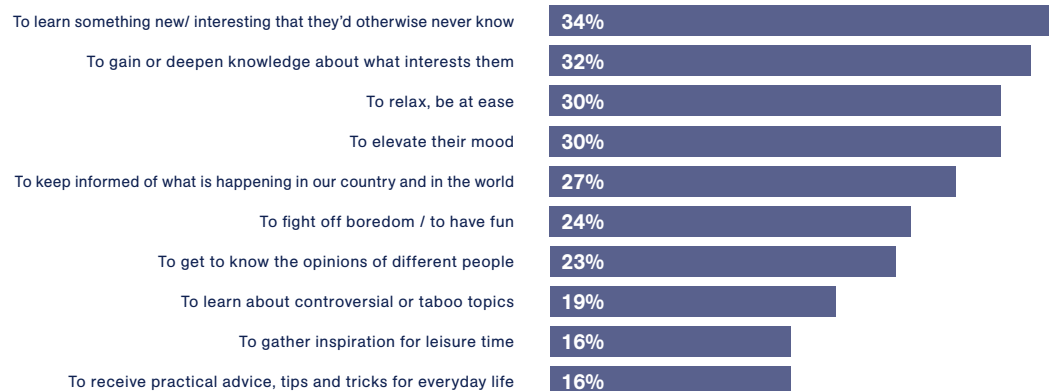
Reasons for listening to live radio – Top 10

Those who listen at least once a week



Reasons for listening to podcasts – Top 10

Those who listen at least once a week



3.3.2 THE PATH TO REMAINING RELEVANT

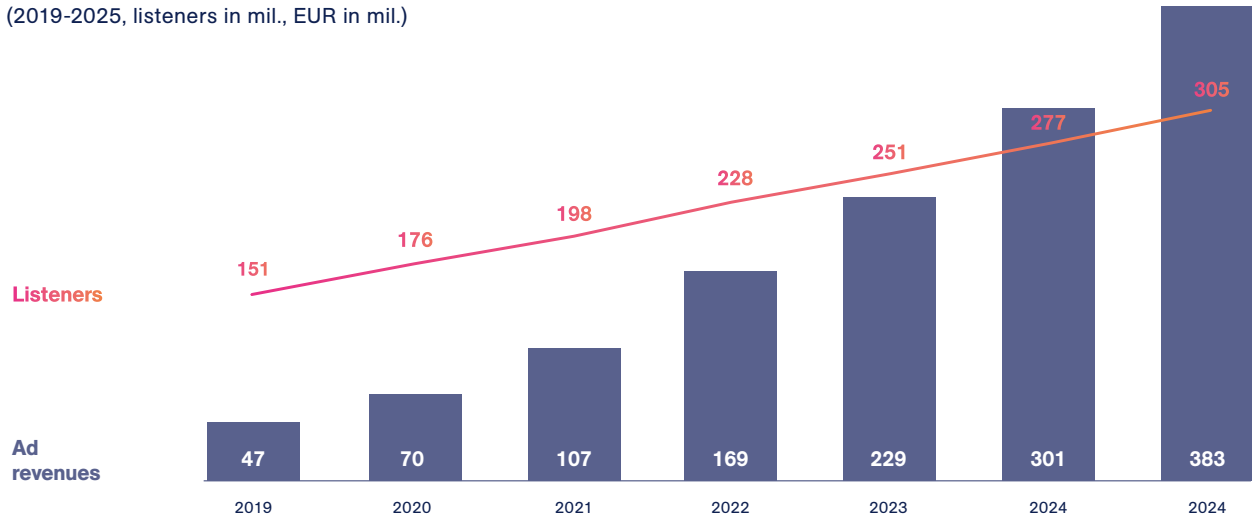
Czech Radio already has an extensive audio archive that it provides to listeners through its on-demand content offer. The strategy for developing Czech Radio's audio content stipulates the effective use and selection of broadcast content from linear broadcasting stations for on-demand listening online, whether it concerns a regular programme or a series. Attention will also focus on

development and production of special on-demand formats intended primarily for listening on Czech Radio and third-party platforms alike. Innovative and experimental projects will also be developed in terms of format, technology, content or sound, as well as special digital strategies for individual stations in accordance with their profiles and focus on target groups.

PROJECTION OF ON-DEMAND AUDIENCE DEVELOPMENT IN THE EBU

Podcast listeners and advertising revenue in Europe

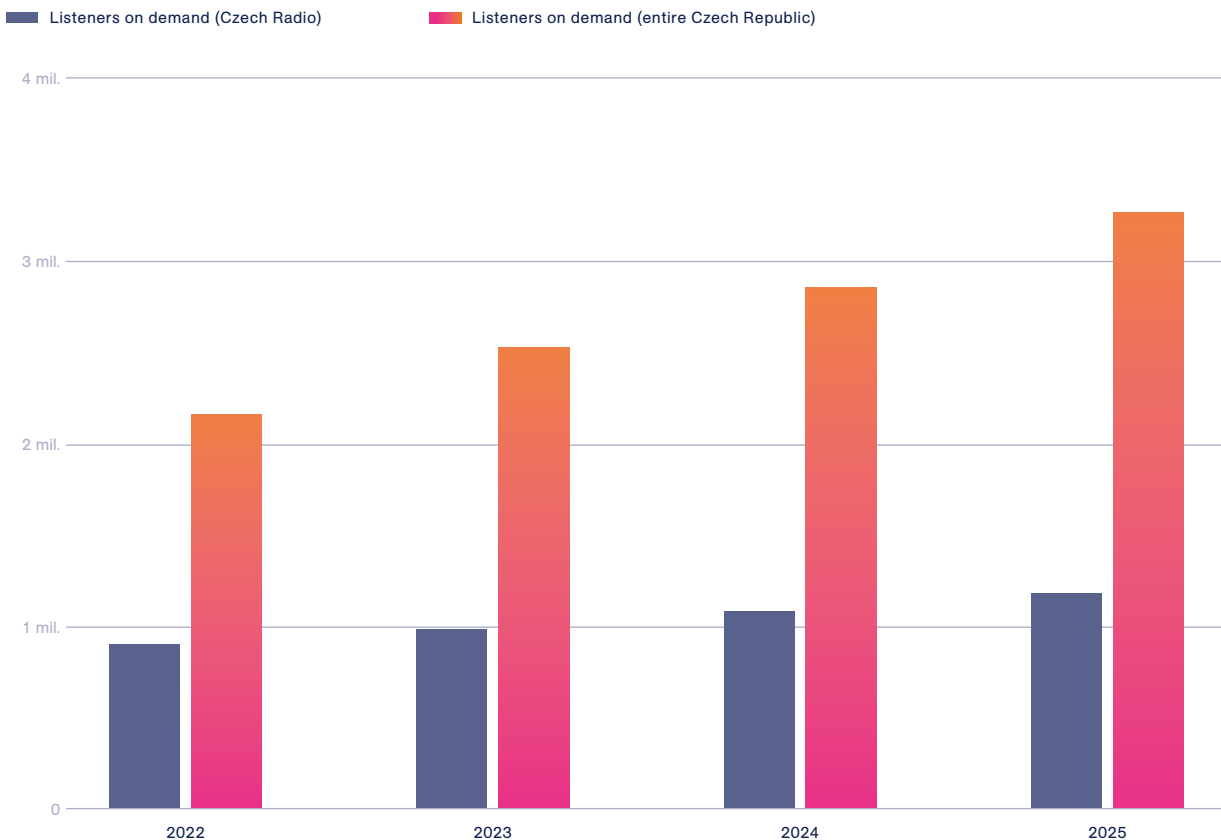
(2019-2025, listeners in mil., EUR in mil.)



PROJECTION OF ON-DEMAND AUDIENCE DEVELOPMENT IN THE CZECH REPUBLIC

This year's 900,000 users would grow to 1.2 million in 2025.

Czech on-demand would grow from this year's 2.2 million to 3.2 million listeners.



3.3.3 WE'RE INTERESTED IN YOUR INTERESTS

Czech Radio always approaches the development, production and distribution of on-demand content with the knowledge that it is designed for specific and different audiences with specific needs, expectations and demands in terms of content and quality. In the future, it will focus on the most significant groups of listeners in relation to on-demand listening, namely listeners of the spoken word and literary-dramatic works (readings, series, radio plays), linear broadcast listeners who search for them as their time permits in the online environment to listen back, listeners of on-demand content – podcasts, and younger audiences just discovering Czech Radio content

in a diverse range of podcasts through third parties and whom Czech Radio wants to bring over for listening on its own platforms. However, it also intends to target those who come to Czech Radio websites from search engines and social networks for text content. To these listeners, it wants to show audio as an accessible source of information, education and entertainment. An inseparable part of the work of Czech Radio is the feedback from listeners, whether in the phase of piloting digital formats or in the retrospective evaluation of published digital content and projects, which is reflected in the work of the authors and dramaturgy.

3.3.4 WE'RE CHANGING CREATORS' ATTITUDES AND MINDSETS

Czech Radio supports digital thinking among content creators. The “think digital” approach will also be considered when promoting content or marketing. It is part of the overall digital transformation that Czech Radio is going through and envisages expanding such digital thinking, sharing experience and methodological guidance of programming colleagues and creators across the Czech Republic, whether they are creative producers, dramaturgs, directors, sound designers, presenters, editors or other creators working with sound and audio content producers.

The “digital cookbook”, i.e. an accessible radio manual for creating podcasts, covers the specifics of

development and production of on-demand content that differs from the creation of audio content for linear broadcasting. The start-up group tasked with developing new formats and digital audio content shares experience from the implementation of podcast projects among other employees and co-workers, participates in the implementation of new workflows and motivates other creators. Through the work of creative producers, Czech Radio wants to support a comprehensive concept of podcast projects, to become an interconnected hub for the development and production of audio content, and to work with target groups, multimedia content, promotion, analysis and format evaluation.

3.3.5 WE ARE OPEN TO NEW CREATORS

Czech Radio has a wide range of professionals in the field of audio production who are involved in the production and publication of audio content: presenters, editors, authors, dramaturgs, directors, sound masters, sound designers, actors, musicians and other professionals. Digital services and podcasts are modern and they focus on the future, as well as experimentation and discovery.

It is one of the reasons why young and promising authors and performers want to cooperate with Czech Radio. Czech Radio wants to profile itself as a medium open to cooperation with new creators and the external environment that brings into it natural competition, new and modern procedures, trends and comparisons in the Czech audio media scene.

Czech Radio wants to actively seek out talented creators for literary-dramatic, documentary and musical works, through a new concept for acquiring and evaluating themes from the internal and external environment, and discover and contact such creators. The current situation on the Czech audio market and increasing competition also demand a change in work with talents and

producers of on-demand content in Czech Radio, who have gained their know-how and experience thanks to Czech Radio and become its stars and faces. Czech Radio wants to be an institution that can motivate them to further cooperation, start new tasks, and at the same time offer reasons for working with just such a public service medium.

3.3.6 DEVELOPMENT AND ACCESSIBILITY OF CZECH RADIO ARCHIVES

The Czech Radio Archive provides exceptional wealth, which must be made accessible to the public in more forms than just classic (linear) broadcasting. The basic prerequisite is intensive digitization not only in the field of sound recordings (which has mostly already occurred), but also in written documents and photographs. Another essential part is the inventory of pre-archival care and streamlining of acquisitions from radio production, including marketing and further outputs.

In order to popularize and spread awareness of the Czech Radio Archive, it is essential, besides supporting the programme and its production, to build a self-confident presentation platform within Czech Radio's current online portfolio, thus enabling sharing the archival wealth with the public. In cooperation with the Digital Library Kramerius of the National Library of the Czech Republic, the Czech Radio Archive will deepen its collaboration in the presentation of documents and magazines.



WHAT DOES THIS MEAN FOR CZECH RADIO LISTENERS?

“The interest is growing among Czech audiences in podcasts and the consumption of audio on demand. We consider the current development of digital audio content essential for reaching younger and new audiences in particular, but also for retaining existing and older listeners whose habits in listening to audio are changing. We want to cultivate the Czech podcast scene, set trends and bring innovation to podcast formats.”

Iva Jonášová, Director of Development and Production

How does this affect our service?

Czech Radio wants to profile itself as a medium that's open to cooperation with new creators and an external environment that brings natural competition to the radio, new and modern procedures, trends and comparisons within the Czech audio media scene.

3.4 DEVELOPMENT AND SYNERGY OF PROGRAMME CONTENT

The main goal of Czech Radio remains achieving synergy of stations to reach the widest possible audience of different ages as well as specific and minority groups. The breadth of the station portfolio, from news and features through regional, entertainment to cultural or profile (musical, sports) stations, should ensure sufficient programme diversity and meet the growing needs and expectations of listeners. In order for the content to be successfully delivered to the widest possible audience, Czech Radio will develop and deepen the compatibility of different distribution channels (terrestrial and digital broadcasting, streaming services, on-demand production and mobile apps) while emphasizing the development of digital services.

3.4.1 SEEKING OUT SYNERGY ACROSS THE PROGRAMME PORTFOLIO

Czech Radio stations will continue to strengthen greater diversity and uniqueness in terms of content and music in addressing target groups defined by age, socio-economic status or interests. Any financial savings in the programme can only be realized with the knowledge that it cannot give up on addressing any group of people, especially from the category of the socially vulnerable. This relates to the task of continuing to cultivate radio genres that make Czech Radio unique and that would be lost without the care of Czech Radio (radio play, documentary). However, stagnation or even limitation of the financial resources of Czech Radio would mean a reduction in the volume of production and an increase in programme replay, and a larger drop in revenues could also harm the breadth of the programme offer of Czech Radio.

In 2021, the portfolio of Czech Radio stations was enhanced to include a sports station (Radiožurnál Sport) and a station for seniors (Czech Radio Pohoda), thus rounding out the programme offer

in traditional linear broadcasting. The current number of 25 stations is also expected to remain unchanged for the next period until 2027.

Czech Radio will consolidate its position as the largest producer and innovator of audio formats, or respectively of on-demand content and podcasts in the Czech online environment. In this regard, it must pay particular attention to children and young audiences who do not prefer linear radio listening – which, on the contrary, will remain dominant among traditional radio audiences, i.e., older generations. Limited financial and personnel possibilities are compelling Czech Radio to shift part of its production capacities from linear broadcasting to creating digital content, though the primary task remains seeking out ways to use one content on both platforms.

Name of platform	Type	Vision	Strategy	Listening and visits *Radioprojekt and online statistics 4Q 2021 – 1Q 2022.	Ambition 2027
Radiožurnál	Nationwide station	Remain number one on the market while maintaining maximum trustworthiness with listeners.	Linear broadcasting based on accurate news, current affairs, live reports from the field (home, regions, abroad and sports), useful information, traffic updates and music.	DR 884k, WR 1670k, 11.5% of the market. ATS 172 min. On-demand Czech Radio and third parties: 1.9 mil. plays.	12-13% of the market. On demand growth +10% annually.
Radiožurnál Sport	Digital station	Become established on the Czech airwaves; teach sports fans to listen to sports.	A combination of live sports broadcasts, streaming sports broadcasts, special sports interviews, audio magazines about professional and amateur sports and music.	DR 6k, WR 16k, ATS 175 min. On demand Czech Radio and third parties: 108k plays.	WR 50k On demand + 10% annually.
Plus	Nationwide station	The only spoken-word radio in the Czech Republic. Leader in on-demand journalism.	To provide listeners with the widest range and deepest context of current events. Plus is a reliable guide to a complex world.	DR 157k, WR 252k, 2.1% of the market. ATS 173 min. On demand Czech Radio and third parties: 4.3 mil. plays.	2.2% of the market. WR 230k listeners. DR 150k listeners. On demand: + 10% annually.
Dvojka	Nationwide station	A smart and entertaining multi-genre station with an emphasis on lifestyle.	The station stands upon three pillars: entertainment, education, music. Popular science, documentary, literary-dramatic and news-features formats are oriented towards a broad listening audience.	DR 357k, WR 619k, 5.6% of the market. ATS 207 min. On demand Czech Radio and third parties: 9.9 mil. plays.	6% of the market. On demand 2022: 20%, 2023 and furthermore: 10%
Pohoda	Digital station	Radio for the oldest and most loyal listeners of Czech Radio.	Filling the segment of slow comfort.		In case of sufficient DAB+ penetration among seniors, 30,000 listeners in a weekly listening session.
Vltava	Nationwide station	The only radio focused on culture and art in the Czech Republic.	Inform about arts and culture in the broadest sense across the age spectrum. To bring a cultivated programme, but not be elitist. To be an ambassador of culture and art in society. The three main pillars of the programme will continue to be music, literary creation and journalism, with the musical and verbal component receiving a 50:50 share in broadcasting.	DR 72k, WR 199k, 0.8% of the market. ATS 140 min. On demand Czech Radio and third parties: 3.4 mil. plays.	0.7% of the market. On demand growth +10% annually.
Radio Wave	Digital station	A multimedia platform for the young generation that addresses fundamental issues related to the lives of today's youth.	Music station for young people in linear broadcasting, significant unification and clarification of the flow, investing its efforts in digital formats (on demand).	DR 11k, WR 47k, ATS 147 min. On demand Czech Radio and third parties: 2.8 mil. plays.	On demand: 2022: 8% 2023 and subsequent years: 5% annually, in the case of sufficient DAB+ radio penetration, an increase of 5% annually in weekly listening.
Radio Junior	Digital station	Multimedia Czech Radio platform for children.	Cross-media project for children. Searching and playing interesting children's content (shows, podcasts, video podcasts and live, moderated blocks).	DR 7k, WR 21k, ATS 60 min. On demand Czech Radio and third parties: 1,081,447 plays.	On demand ambition 2022: 15%; 2023 and subsequent years: 5-10%.
Jazz	Digital station	Modern jazz music radio 24 hours a day.	A station that offers musical art to seasoned listeners and those looking for a way to get there.		On demand 2022: 15% 2023 and subsequent years: 5-10%.
D-Dur	Digital station	Classical within reach.	A station offering musical art to seasoned listeners and those looking for a way to get there.		On demand 2022: 15% 2023 and subsequent years: 5-10%.
Radio Prague International	Digital station	The voice of the Czech Republic in the world.		Web traffic 1Q 2022: 2.4 mil. Website views 1.5 mil. visits.	Increasing website traffic, growth on social networks by 5-10% annually.
Regional broadcasts	Nationwide station	Regional stations are the imprint of a given region in broadcasting.	Each regional station should be radio that lives with its listeners and mediates life in the region.	DR 430k, WR 706k, ATS 213 min. 7% of the market. On demand Czech Radio and third parties: 1.9 mil. plays.	The total market share will be stable at between 6-7%.
mujRozhlas	Audio portal	The largest audio portal on the Czech Internet and the primary tool for demand consumption of Czech Radio content.			Continuous increase in listening to audio on demand by about 10%, including third parties.
iRozhlas	News server	Be a trusted and sought-after news server.			Exceeding the reader's ceiling - approx. 1.7 million readers/month.

3.4.2 NEWS

Retaining its position as the Czech Republic's most listened to station while maintaining high credibility, timeliness and usefulness of the news content remains the goal of Czech Radio Radiožurnál. An important attribute of Radiožurnál's success will be the synergy in terms of programme content with the news-features station Plus, the sports digital station Radiožurnál Sport and the news server iROZHLAS, which focuses on personalization of content for each reader and on the dissemination of regional, cultural and sports news and journalism. As the only spoken-word radio in the Czech Republic, Czech Radio Plus

will provide listeners with the broadest range and deepest context of current events, playing the role of a reliable guide to the complicated present. The dynamic rise in popularity of Czech Radio Plus should also get a boost from a greater degree of on-demand and more demanding journalism content online mainly for younger users. The task of the new Radiožurnál Sport station will be to establish itself on the Czech airwaves, teach sports fans to "listen to sports" again, contribute to the development of DAB digital broadcasting and raise awareness of its advantages and possibilities among potential listeners.

3.4.3 REGIONS

Through the completed network of fourteen regional stations in all regional cities of the Czech Republic, the development of the social and cultural integrity of individual regions remains one of the key tasks. Due to the targeting of older listeners (60+) living in smaller cities and municipalities that are conservative and regionally determined, there will be a further strengthening of local news and public service columns supporting,

among others, the financial, legal or health literacy of listeners. The existing model of regional broadcasting, based on independent broadcasting of individual regional stations during prime time (5:00 a.m. – 7:00 a.m.), and joint evening and night broadcasting, will be preserved. In the case of forced financial savings, it is possible to increase the number of jointly broadcast hours in the service and entertainment segment.

3.4.4 PROGRAMME AND PRODUCTION OF DEMANDING FORMATS

News stations of Czech Radio cover the complete age structure of listeners from children to seniors. The Radio Junior and Radio Wave multimedia projects will place maximum emphasis on on-demand content and digital services online, which have the greatest chance to reach children and young audiences connected to the online environment.

The second most listened to station of Czech Radio is Dvojka, aimed at an audience of older middle-aged people (45–65 years) with an emphasis on women. It will continue in its charted journey, the goal of which is a more pronounced association of the station with entertainment, joy and accessibility for everyone. The rejuvenation of the Dvojka programme will be compensated by the targeting of the Czech Radio Pohoda digital station towards listeners of the senior age,

especially towards the 70+ group. Czech Radio Vltava will remain in its unique role as media ambassador of culture and art in society. Thanks to a more consistent synergy with the music stations Czech Radio D-dur and Czech Radio Jazz and the communication campaign, Vltava should rid itself of the stereotypical perception of presenting classical music alone and strengthen the clarity and compactness of the broadcasting scheme. As part of the production of demanding literary-dramatic, documentary and musical formats, the openness of Czech Radio will be strengthened towards cooperation with the external environment and related talent acquisition. The systematic development of new formats will respond to changes in listeners' consumption habits and needs. The model of creative producers will be integrated into the Development and Production Department.

3.4.5 CZECH RADIO ART ENSEMBLES AND COMPETITIONS

Czech Radio aims to continue strengthening the brand of the Prague Radio Symphony Orchestra in the coming years and to increase awareness of its concert offer to the public as well as of recordings created for broadcasting and online platforms of Czech Radio. Petr Popelka, the new Chief Conductor and Artistic Director of the Prague Radio Symphony Orchestra should become the main face of the ensemble for seasons to come. In the future, the Prague Radio Symphony Orchestra should use both main concert halls in Prague (the Dvořák Hall in Rudolfinum and the Smetana Hall in the Municipal House) for its concerts, continue cooperating with leading domestic and foreign performers, and create varied musical works, including contemporary works (premieres of compositions commissioned by the Orchestra). The recording activity will newly take into account the significant anniversary of Bedřich

Smetana and will continue to map Czech composers of the 20th century. The new strategic goal for financing is to secure more significant support from the City of Prague. For decades, Czech Radio has been supporting children's artistic activity in its two ensembles – acting and singing. For the next few years, Disman Radio Children's Ensemble has made it its priority to work with children in three lines: work with artistic text and support of radio artistic creation for plays and readings during the broadcast; development of the radio studio, i.e., working with the microphone in a reportage-like manner and preparing news; and theatre work. However, working on these three lines also involves guiding children to develop versatile cultural skills and insight. The Czech Radio Children's Choir shares a very similar aim, and although its activities are focused more narrowly – developing musical talent – it has the same orientation in terms of values.



WHAT DOES
THIS MEAN FOR
CZECH RADIO
LISTENERS?

“If we have to make financial savings in the programme in the coming years, we must not give up addressing any population group, especially the socially weak. Similarly, we must cultivate radio genres that make radio unique and that would otherwise disappear without the care of Czech Radio.”

Ondřej Nováček, Programme Director

“The Prague Radio Symphony Orchestra wants to illuminate the Orchestra more with its new Chief Conductor Petr Popelka even outside the recording studios and ensure greater awareness among visitors to music halls.”

*Kateřina Konopásková,
Director of the Section of Artistic Bodies and Competitions*

Example of project plan

Limited financial and personnel possibilities are compelling Czech Radio to shift part of its production capacities from linear broadcasting to creating digital content, though the primary task remains seeking out ways to use one content on both platforms.

3.5 SUSTAINABLE FINANCING AND LEGISLATION

Stable and predictable financing is a key prerequisite for Czech Radio to continue to provide and develop services for listeners on the existing scale. The radio license fee is an ideal system because it guarantees the independence of Czech Radio and creates a direct link with the public.

Czech Radio has a mixed funding model, which means that in addition to the main source of financing – revenues from the radio license fees, which account for almost 95% of its revenues – it tries to secure additional funds

through commercial activities within the framework defined by law. The main business activities include advertising, sponsorship and the sale of copyrights.

3.5.1 RADIO LICENSE FEE AND ITS INCREASE

The main source of financing for Czech Radio is formed of revenues from radio license fees. The conditions for radio license fees collection is set out in Act No. 348/2005 Coll. on radio and television fees. However, the amount of the radio license fee has not changed in seventeen years. It amounts to CZK 45 per month for one household with a radio receiver, or for one radio receiver in the case of legal entities and entrepreneurs, since 2005.

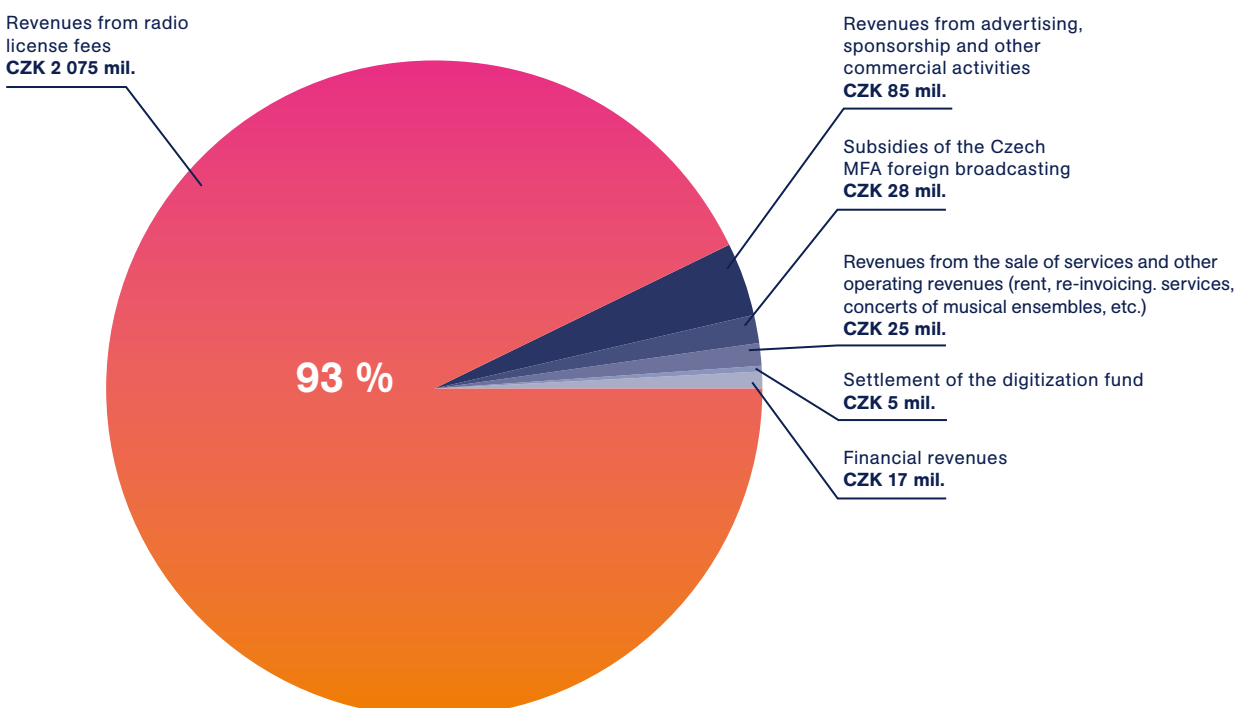
Czech Radio cannot cope with long-term growing costs caused mainly by inflation and the rising

cost of labour despite the effective collection of radio license fees, successful recovery of unpaid fees and the general willingness of listeners to pay them. Since 2005, the aggregate inflation rate has almost halved the fair value of the radio license fee compared to its nominal value of CZK 45.

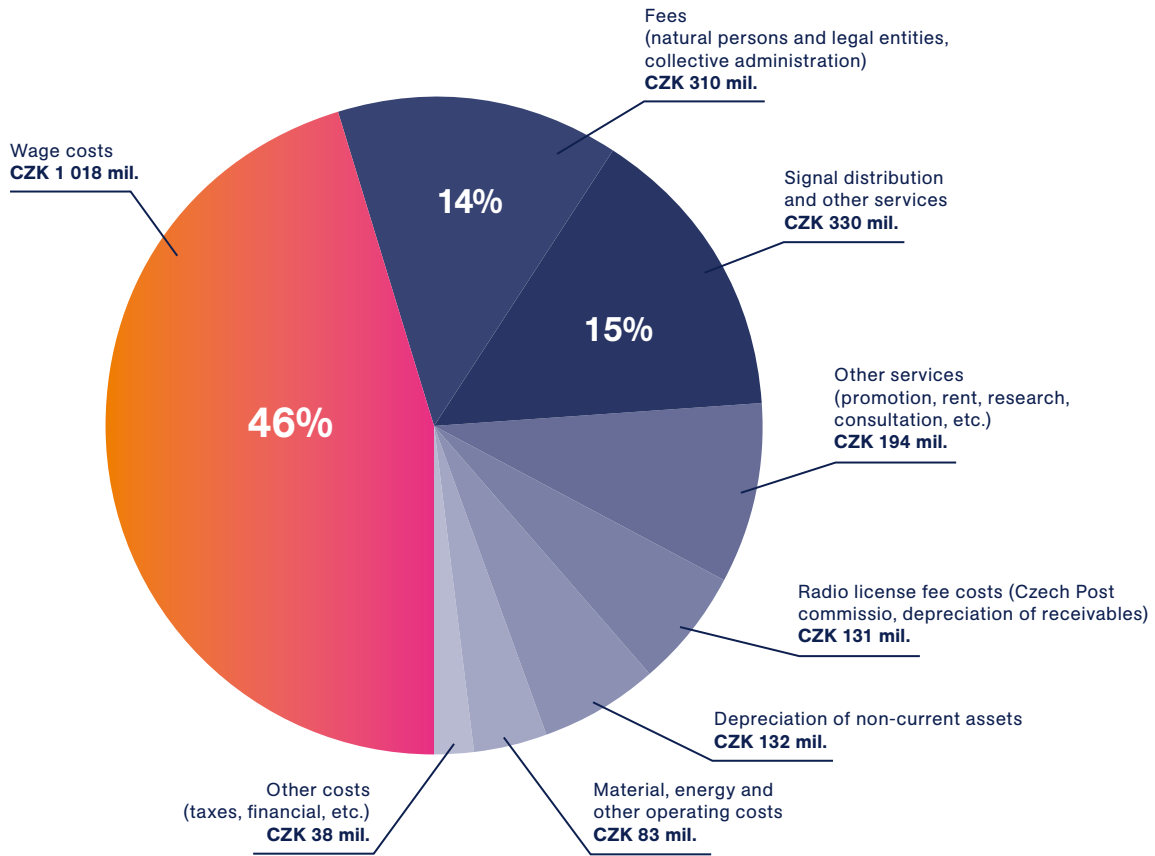
Therefore, Czech Radio will strive to get the distribution fee increased by at least CZK 15, which would at least partially offset the drop in its fair value.

CURRENT FINANCIAL SITUATION OF CZECH RADIO

Revenues of Czech Radio 2022



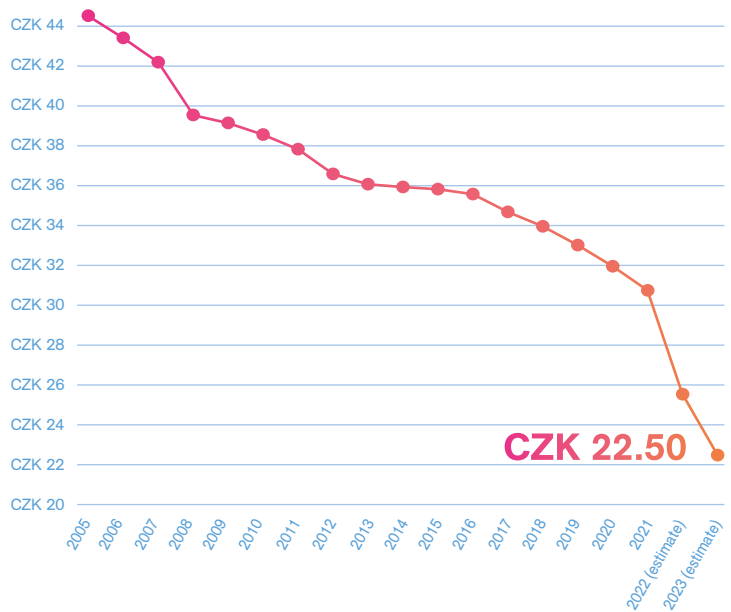
Costs of Czech Radio 2022



Fair value of the radio license fee

(since last increase in 2005)

Annual inflation rate (in %)		Fair value of radio license fee in CZK	
Last increase in RCF: 01/10/2005		45,00	
2005	1.9	31. 12. 2005	44.79
2006	2.5	31. 12. 2006	43.67
2007	2.8	31. 12. 2007	42.44
2008	6.3	31. 12. 2008	39.77
2009	1.0	31. 12. 2009	39.37
2010	1.5	31. 12. 2010	38.78
2011	1.9	31. 12. 2011	38.04
2012	3.3	31. 12. 2012	36.79
2013	1.4	31. 12. 2013	36.27
2014	0.4	31. 12. 2014	36.13
2015	0.3	31. 12. 2015	36.02
2016	0.7	31. 12. 2016	35.77
2017	2.5	31. 12. 2017	34.87
2018	2.1	31. 12. 2018	34.14
2019	2.8	31. 12. 2019	33.19
2020	3.2	31. 12. 2020	32.12
2021	3.8	31. 12. 2021	30.90
2022 (estimate)	17.0	31. 12. 2022	25.65
2023 (estimate)	12.0	31. 12. 2023	22.57

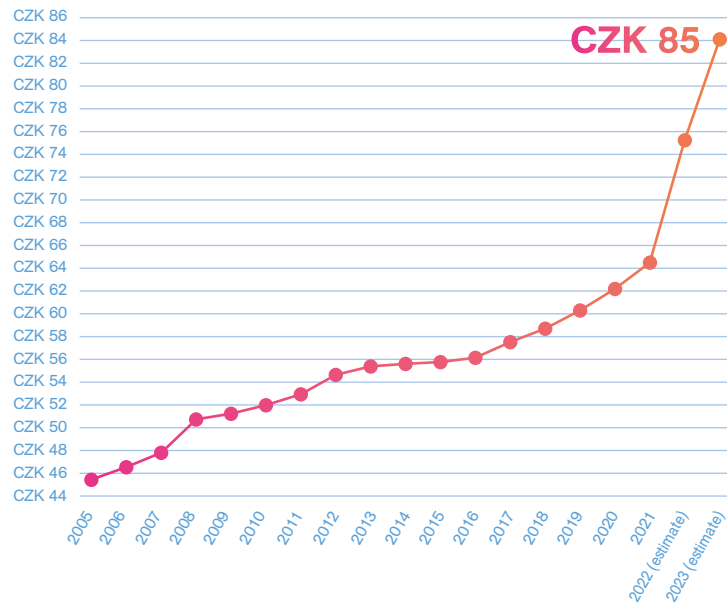


The amount of the radio license fee is CZK 45 per month / CZK 540 annually (unchanged since 01 October 2005), while the fair value of the fee decreases due to inflation and cumulatively decreased by CZK 20 to CZK 25 for the period of 2005 to 2022!

Valorisation of the radio license fee to maintain its fair value

(since last increase in 2005)

Annual inflation rate (in %)		Valorisation of the radio license fee in CZK to maintain its fair value as of:	
Last increase in RCF: 01/10/200		45.00	
2005	1.9	31. 12. 2005	45.21
2006	2.5	31. 12. 2006	46.34
2007	2.8	31. 12. 2007	47.64
2008	6.3	31. 12. 2008	50.64
2009	1.0	31. 12. 2009	51.15
2010	1.5	31. 12. 2010	51.92
2011	1.9	31. 12. 2011	52.90
2012	3.3	31. 12. 2012	54.65
2013	1.4	31. 12. 2013	55.41
2014	0.4	31. 12. 2014	55.64
2015	0.3	31. 12. 2015	55.80
2016	0.7	31. 12. 2016	56.19
2017	2.5	31. 12. 2017	57.60
2018	2.1	31. 12. 2018	58.81
2019	2.8	31. 12. 2019	60.45
2020	3.2	31. 12. 2020	62.39
2021	3.8	31. 12. 2021	64.76
2022 (estimate)	17.0	31. 12. 2022	75.77
2023 (estimate)	12.0	31. 12. 2023	84.86



Czech Radio has long been requesting an increase in the radio license fee by at least CZK 15. This would partially compensate for the devaluation of the radio license fee induced by the aggregate inflation rate since 2005.

3.5.2 DIVERSIFICATION OF BUSINESS REVENUE SOURCES

The main source of commercial revenues of Czech Radio is advertising and sponsorship on the nationwide stations broadcasts, especially Czech Radio Radiožurnál and Czech Radio Dvojka. While respecting the relevant legislation, Czech Radio is also searching for other ways to increase commercial revenues in the future. Commercial revenues do form just a minor part of the total Czech Radio budget, but they are significant because they are used for financing its marketing activities, for example.

Thanks to the fact that Czech Radio can carry out commercial activities to a limited extent by law, listeners have a better overview of its broadcasting, projects and stations. Czech Radio respects the dual system of the radio market. It operates its commercial activities in a way that does not disrupt this system and so Czech Radio supports the performance of tasks arising from its public service role.

3.5.3 ADVERTISING AND SPONSORING

The potential for growth in the use of advertising time at Czech Radio stations is ca. 10% in total. The filling of advertising times in cash advertising can increase under ideal conditions on stations Radiožurnál by 5% and Dvojka by 15-20% and in regions by 25-40%. The long-term average

advertising income in 2016-2020 fluctuates around CZK 21 million. The currently predicted maximum advertising revenue due to limited advertising time and prices of radio advertising on the market is CZK 26-26.5 million, i.e., an increase to an average income of CZK 23 million.

The programme and shows sponsoring can grow under ideal conditions on stations Radiožurnál by 5% and Dvojka by 20-25% and in regional studios by 50-70%. The growth potential of sponsorship revenues at all of the aforementioned stations is ca. 50% in total. The increase in sponsoring revenues stipulates robust acquisition activity, especially in the regions.

The prerequisite for increasing advertising and

sponsorship revenues is the introduction of appropriate new products. One good example was the launch of the Radiožurnál Sport station, which successfully entered first into sponsorship sales and as of July 2022, it launched advertising sales as well. The revenues of this special digital station far exceed the commercial potential of other digital stations of Czech Radio, but also that of a series of stations broadcasting in the FM band.

3.5.4 FURTHER SALES REVENUES

Czech Radio is looking for additional sources of financing from business revenues in the area of on-demand content. In 2022, preparations are underway for a pilot project to sell licenses for radio plays. In the following period, Czech Radio also plans to continue in its pilot project of sponsoring selected podcasts, when the sponsorship message is placed in a pre-roll position where users cannot skip the message. There are also

considerations for expanding the positions where it is possible to place sponsoring. Demand for sponsorship on the market is gradually increasing, clients buy the product as part of the advertising mix. Czech Radio has a fairly privileged position on the market for this product and a large offer variability. The offer should include gradually more podcasts in order for the overall offered reach to achieve at least one million listeners.

3.5.5 MEDIA LEGISLATION AND ITS UPDATE

Should Czech Radio continue to develop its services for listeners and provide them in full, ensuring its financing and economic stability in the coming years is key. In recent years, Czech Radio has implemented a number of internal austerity measures, mainly related to its operation and the number of jobs. If there is no increase forthcoming in the radio license fee within two years, Czech Radio will be forced to implement such austerity measures that will also affect its programming and broadcasting.

Czech Radio will therefore strive to have amended Act No. 348/2005 Coll., on radio and television fees, in the sense of increasing the radio license fee from CZK 45 per month to CZK 60 per month. On top of the radio license fee amount, Czech Radio finds it essential to open discussions on the definition of a taxpayer or radio receiver in the legislative field. In particular, the concept of a radio receiver as such is far broader in today's digital age than in the past.

Czech Radio will also want to open the topic of amending Act 484/1991 Coll., on Czech Radio. This in many respects is due to the time of its creation when this law was adopted in the beginnings of the Internet. Additionally, it illogically differs in a series of points from the provisions of Act No. 483/1991 Coll., on Czech Television. Defining nationwide and regional stations can be considered problematic. Furthermore, the Act contains numerous unjustified differences concerning the performance of members of the Czech Radio Council compared to those of the Czech Television Council, or the length and repetition of the term of office of the Supervisory Committee. More frequent amendments to the Act on Czech Television, unjustified in terms of the inherent differences of these two public service media, resulted in differences between the Acts on Czech Radio and Czech Television which also apply to other parts of these laws, such as situations when the General Director post was vacated, or the Council dismissed the General Director.



WHAT DOES
THIS MEAN FOR
CZECH RADIO
LISTENERS?

“It is the stable financing of Czech Radio that guarantees the public the existence of an independent public service media offering balanced and truthful information, culture, education and entertainment.”

Jiří Hošna, Director of Communications, Commerce and External Relations

“Increasing the radio license fee is the only solution for maintaining and further developing all services for listeners in the future. Czech Radio is open for business offering its content 24 four hours a day on twenty-five stations, websites or social networks – all for just CZK 45 a month. The fee amount has remained unchanged since 2005, but its fair value has devalued by almost half.”

Martin Vojslavský, Director of Economics

Example of project plan

In recent years, Czech Radio has undertaken a number of internal austerity measures in the field of operations or in the field of personnel. Failure to increase the radio license fee amount within the two years will result in the need to start limiting Czech Radio programming and broadcasting. Czech Radio will strive to increase the radio license fee, which is the main source of its financing. It will explore all the possibilities that the legislation affords it to increase its income derived from commercial activity.

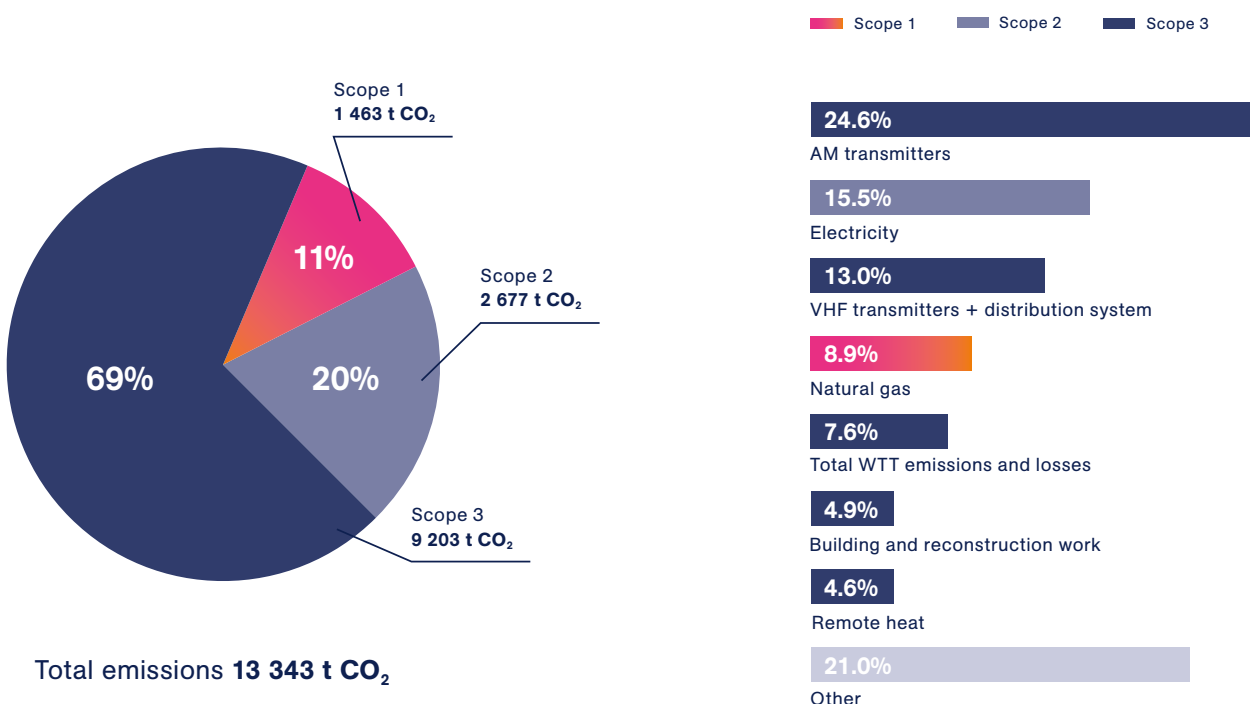
3.6 ENVIRONMENTAL SUSTAINABILITY

Czech Radio considers the challenges associated with the environmental sustainability of its operation, production and broadcasting to be a strategic priority. In the coming years, it will proactively and systematically take all steps to be ready to respond flexibly to external and internal requirements leading to the environmental sustainability of its activities. By the very essence of public service, it is tasked not only with adapting to climate change, but also to acting in line with the principles of sustainable development. This applies

especially at a time when our company is commemorating one hundred years since the very start of regular Czech Radio broadcasting and, together with the employees of Czech Radio, is wondering what kind of radio we would like to see in our next century. We are well aware that as an institution, we too consume our planet's resources and so it is our duty, as part of our public service, to exercise maximum economy. It is our ambition to be among the first in the Czech media market to implement new, more environmentally friendly processes and procedures. Already in the previous period, Czech Radio decided to prioritize the energy-friendly distribution of DAB+, and by cancelling amplitude modulation (AM) broadcasting, it contributed greatly to saving energy on its distribution. These steps and others support its credibility as a public service media because it also operates in accordance with sustainable development goals.

The study on Czech Radio carbon footprint for 2021 shows that direct emissions (S1) account for 10.97%, indirect emissions (S2) 20.6% and other indirect emissions (S3) 68.97% of Czech Radio's greenhouse gas emissions.

Czech Radio carbon footprint in 2021



3.6.1 AIMS FOR THE INTERNAL FUNCTIONING OF CZECH RADIO

Czech Radio wants to include the principles of sustainable behaviour in the very essence of its corporate culture. However, success in this area depends on the degree of involvement of every employee and associate of Czech Radio. The right internal campaign will explain what opportunities employees and co-workers already have to contribute to making the operation of Czech Radio more environmentally sustainable. Reducing paper consumption, using energy-saving lighting, heating and small appliances all contribute not only to saving money, but also to more reasonable consumption. In addition, Czech Radio will make even more

systematic use of the intelligent management system of the buildings it owns, which it has implemented in recent years during their reconstruction. It uses the so-called attenuation mode of heating and cooling, replaces lighting with LED light sources and installs presence sensors in common areas to regulate lighting. Czech Radio will strive to procure certified energy from renewable sources and support further sorting of waste to include bio-waste and metals. It will systematically monitor its carbon footprint in accordance with the requirements of the International GHG Protocol and will set up non-financial ESG reporting from 2024.

3.6.2 GOALS VIS-À-VIS THE MARKET AND PARTNERS

Czech Radio, as a public service medium, is governed in its contractual relations by the Public Procurement Act. Since almost 70% of the Czech Radio carbon footprint falls within the so-called supply chain, it is appropriate for Czech Radio to take into account environmental criteria when selecting services in clearly defined commodities.

As far as media partnerships and barter are concerned Czech Radio has the ambition to promote the values it is guided by also in its partners. Such changes in the supply chain that will help create conditions for reducing Czech Radio's own carbon footprint will also contribute to changing the market and making such services more accessible to all.

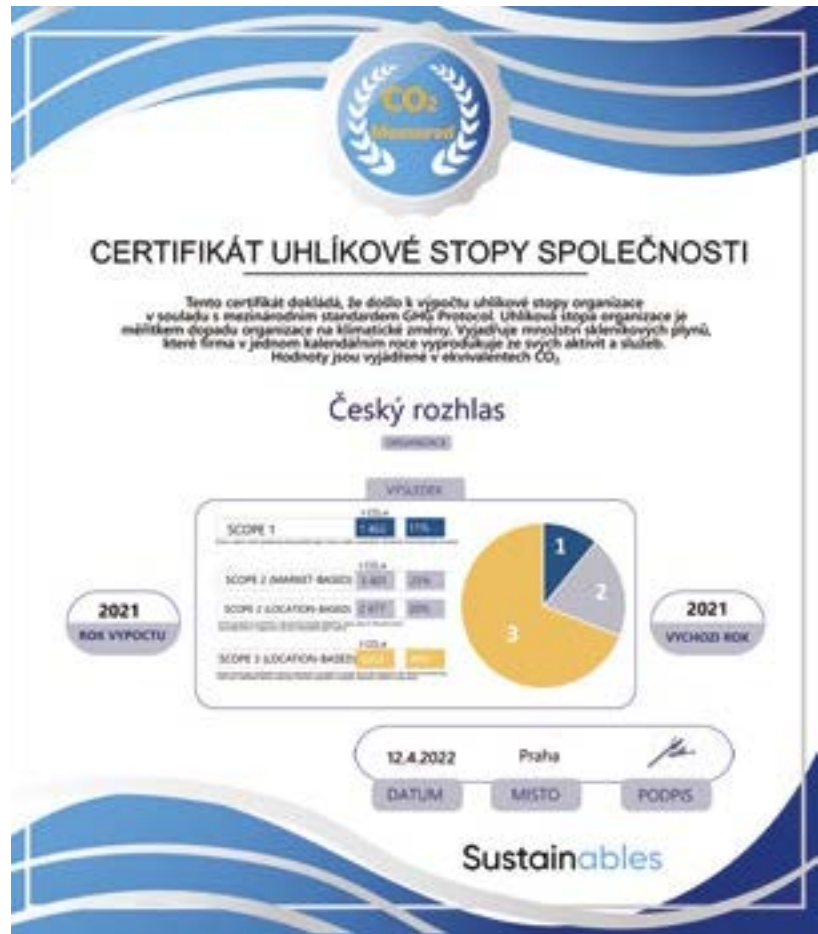
3.6.3 GOALS VIS-À-VIS OUR LISTENERS

The main task of Czech Radio as a public service media is the production and broadcasting of programmes. Accordingly, it will strive to make programme production and broadcasting as environmentally friendly as possible. This will concern not only lower consumption of resources necessary for programme production, other radio units or, for example, station and artistic events, but also the subsequent environmentally friendly distribution, archiving and shredding of documents from the activities of Czech Radio.

Czech Radio intends to cover the topic of environmental sustainability and climate change in a comprehensible and accessible way for all generations and target groups of its audience. Only by not isolating this topic into special programmes, it will adequately permeate throughout the programme, it will always be presented in an accessible context for the given station or programme.

Relevant internal carbon footprint ratios of Czech Radio

Category	Year 2021
Carbon footprint (US) (S1+S2+S3) per employee (FTE) [t CO ₂ e/FTE]	9.44
US (S1+S2) per employee (FTE) [t CO ₂ e/FTE]	2.93
US (S1+S2+S3) in turnover [t CO ₂ e/mil. euro]	127.4
US (S1+S2) in turnover [t CO ₂ e/mil. euro]	45.74



Company Carbon Footprint Certificate



WHAT DOES
THIS MEAN FOR
CZECH RADIO
LISTENERS?

“We believe that by its very nature as a public service medium, Czech Radio has the task not only of adapting to climate change, but also of behaving in accordance with the principles of sustainable development.”

Martina Májíček Poliaková, Director of the Strategic Development Department

How does this affect our service?

The celebration of the 100th anniversary of the start of regular Czech Radio broadcasting in 2023 should showcase the possibilities of more environmentally friendly production of programmes and radio events, such as concerts or social events, and Czech Radio should take this aspect into account in the coming years.



3.7 QUALITY WORKING ENVIRONMENT

Czech Radio is a public institution with a hundred-year history, which currently employs approximately 1,390 people and cooperates with thousands externally. As a traditional yet modern public service medium, it flexibly adapts to changes and is a leader in audio innovation. It is known for its stable working environment, which also encourages creativity. It respects these values, which result mainly from the Act on Czech Radio and the Czech Radio Code of Ethics and they are the

greatest currency of the working environment in a public institution besides independence and diversity. Its wish is for this to remain the case in the coming years.

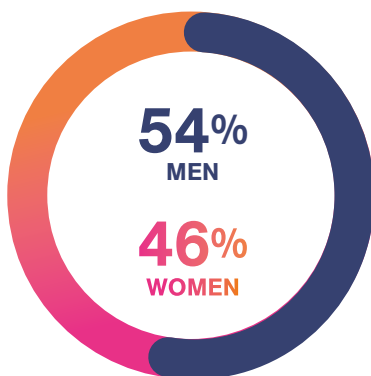
In the highly competitive and dynamically developing media labour market in the Czech Republic, driven by global trends in hybrid ways of working, Czech Radio wants to offer its employees most of all quality and credibility. Connecting with Czech Radio means working with the best in the field, following the values of public service and promoting the independence, responsibility and diversity of public service through their actions.

3.7.1 PROMOTING INTERNAL DIVERSITY

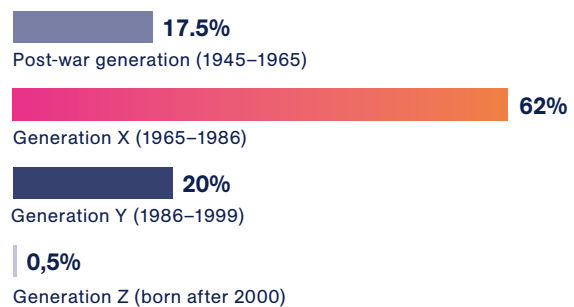
Since Czech Radio broadcasts for all generations, age diversity is also reflected in the structure of its employees. Four generations meet in Czech Radio and each of them presents a different dynamic. They each have different expectations from the employer and the work environment, ranging from the traditional approach to the latest working tools and use of technology. Czech Radio wants to ensure for all in the coming years favourable working

conditions, including pay, career advancement and opportunities for skills development. It will promote work-life balance and flexible working hours. Every editorial, administrative or highly specialized role will receive support in developing in the field based on their respective needs. The aim is to use internal resources as well as the latest educational offers on the market while applying modern technologies.

Gender structure of Czech Radio



Generational ratio among Czech Radio employees



3.7.2 EMPLOYEE MOTIVATION

With respect to the needs of its employees, Czech Radio builds a working environment in which employees want to meet and work together. In the past, Czech Radio managed to adapt to the unprecedented situation caused by the COVID-19 pandemic and fully switched within days to a hybrid working model, combining work from home and from the office. It also utilizes the experience of this exceptional period since the return to normal working mode. Online meetings tools and the use of work from home are among

proven work tools that, in situations convenient for Czech Radio and for employees, make work performance more pleasant and efficient.

The goal of Czech Radio is that everyone can choose from a variety of benefits. It supports both sports and relaxation activities. It makes sure to get maximum involvement in work of employees who are caring for a child by enabling part-time work. The benefits offer also includes the possibility of gradual retirement.

3.7.3 WORK IN THE REGIONS

Almost a third of employees work in regional studios, which are gradually undergoing modernization to meet the necessary standards for modern employment.

Each regional station has its own spatial specifics, but the aim of Czech Radio is to create appropriate working conditions everywhere to the maximum motivation of employees and to facilitate informal meetings.



WHAT DOES THIS MEAN FOR CZECH RADIO LISTENERS?

“Thanks to our century-long history, we need to be more keenly aware of modern trends so we can offer adequate services in the current form in an ever-changing environment.”

*Ludmila Šussová,
Director of Human Resource*

Motivation

By constantly working with employees, we want everyone to share our corporate goals and values.

Regions

We do not forget anyone and strive to create favourable working conditions for quality work everywhere.

Author profiles

Jiří Hošna

Director of Communications, Commerce and External Relations

After graduation, he spent several years working at the Czech News Agency. He also practiced journalism as an editor of the newspaper Mladá fronta Dnes. He began devoting himself intensively to public relations when he assumed the position of Spokesperson of the Hradec Králové Region. Before joining Czech Radio, he worked as a manager at AMI Communications. He has held the post of Director of Communications, Commerce and External Relations since March 2016.

Iva Jonášová

Director Development and Production

Iva has been working at Czech Radio since 2001, gradually working in content creation as an editor, presenter, programme creator, dramaturg, creative producer and project manager on six stations of Czech Radio. She cooperated with Czech Television as a presenter and author of programmes, in 2011-2015 she was a head of a public benefit society and ran a community radio station. Since December 2015, she has been the Editor-in-Chief of the Czech Radio Wave youth station and a member of the European Broadcasting Union group for young audiences and the station Youth Channels Heads. In 2021, she led the Digital Audio Content Development Department in the Programme Section. Since January 2022, she has been the Director of Development and Production of Czech Radio.

Ondřej Nováček

Programme Director

After studying Czech studies and history, he joined Czech Radio in 2002, first as Editor-in-Chief and later Director of the newly established regional station for the Vysočina Region, Czech Radio Region. From May 2012, he was Director of the Czech Radio Broadcasting Center, and stood at the birth of the Czech Radio Plus station, of which he was the Editor-in-Chief from 2015 to 2017. Between 2019 and 2021, he successfully modernized the programme and focus of Czech Radio Dvojka. He is currently the Programme Director.

Jiří Malina

Director of Marketing and Digital Services

Jiří worked at Czech Radio from 2001 to 2010, when he led a team of Internet specialists and was long the Deputy Editor-in-Chief of Czech Radio Online. Over these years, he focused primarily on streaming audio and video content on the Internet and podcasting. In 2011, he co-founded the radio station StreetCulture. He returned to Czech Radio after seven years at the Prague ZOO, where he held, among other things, the position of Concept and Development Deputy and subsequently headed the Public Relations Department. Since 2018, he has led the New Media Department and is currently the Director of Marketing and Digital Services.

Martina Májiček Poliaková

Director of Strategic Development Department

She joined Czech Radio in 2013 as a researcher in the Research and Library Department. She participated in the formation of the creative process at Czech Radio as part of the Vision 2020 (Vize 2020) project and the Peer-to-Peer Review by the European Broadcasting Union (EBU), which Czech Radio underwent in 2018. Since 2019, she has chaired the Strategic Committee of Czech Radio and worked with other partners within the EBU on such matters as strategic communication or digital transformation. In 2022, she graduated

from the Academy of Sustainability Management at the Centre for Sustainability Management and Ethics of the Prague University of Economics and Business.

Ludmila Süssová

Director of Human Resources Department

She joined Czech Radio for the first time as HR Director in 2014 and returned to radio in January 2022. She has devoted her entire professional life to work in the field of human resources in large companies. In recent years, she worked as HR Director at the CZ PEOPLE recruitment agency. Over her many years of experience, she also worked in a security agency, energy and state administration, as well as in HR management positions.

Pavel Šimoník

Head of the Research Department

In the early 1990s, he started as an analyst at the STEM research agency, then he was the Client Service Director at the STEM/MARK research agency, where he also became their Research Director. He is one of the leading experts on the research project Radioprojekt and is currently in the management of the radio section of the Communication and Media Organisations Association (SKMO). In 2020, he left STEM/MARK and after twenty years in that research agency, he joined Czech Radio as the Research Department Manager.

Martin Vojslavský

Director of Economics

His professional beginnings are associated with Czech Television, where he worked for years as the Director of Controlling, Director of Financial Planning and later as Deputy Financial Director. In 2013, he joined Czech Radio as the Director of the Controlling Department, two years later, he was appointed as Director of the Economic Department and since 2017, he is part of Czech Radio's top management as the Director of Economics.

René Zavoral

Director General of Czech Radio

During his university studies, he worked as an assistant to a senator and since 1999 as an advisor to the President of the Senate of the Parliament of the Czech Republic. In 2001, he joined Czech Radio as a Marketing and PR manager, from where he left to work in the bank Komerční banka in 2005. He worked in corporate communication until September 2006. In October 2006, he returned to Czech Radio, where he was elected Director of Marketing and PR. He became the Director of Communications and External Relations Department in April of 2010. Then in November 2011, he was elected Deputy General Director for Strategic Development. On April 2013, he was elected Deputy Director General for Programming and Broadcasting. On January 21, 2016, he moved to General Director of Czech Radio, defending his position in 2021 and beginning his second term in January 2022. In 2021, he defended for the third time the position of Vice-Chairman of the Radio Committee of the European Broadcasting Union (EBU), which deals with the development strategy of European broadcasting radios.

Glossary

Czech Radio on-demand content

Content that, unlike linear broadcasting, listeners play according to their choice and at a time that suits them. Selected audio and accompanying content of Czech Radio will be played either on the online platforms of Czech Radio (on the programme website, audiportal or the mujRozhlas app, the website of a specific station and on the news server iROZHLAS.cz), or on so-called third-party platforms (in podcast apps Apple Podcasts, Google Podcasts, Spotify, etc., on YouTube and on social networks such as Facebook, Instagram, Twitter or TikTok).

Content publishers often deal with the difference between content that is created primarily for on-demand consumption (so-called online first/on demand first content) and content that is used for broadcasting and is subsequently published in the online space. The classic programme offer of Czech Radio is based on the station principle. Gradually, however, some innovative projects are also being created, which are primarily intended for the online environment: The Hitchhiker, Filter, Pillow, Digital Writer and more. The listener may encounter the designation for on demand services that have already become established in the Czech environment: podcasts, audiobooks, talk.

Third parties

In relation to the programme offer and services of Czech Radio, third parties are entities that redistribute the content of Czech Radio through their own online platforms and services to listeners. Their goal is generally to profit from the sale of advertising they sell on the website or before the audio play, and to promote their own listening platform.

It is audio, textual or complementary as well as multimedia content that Czech Radio, based on its discretion and its content-sharing policy, decided to offer to third parties for redistribution through their services and platforms. Its aim is to make this content of Czech Radio accessible to as many listeners as possible, even outside its radio distribution platforms, and thus to get its content out to a new target group. However, the scope and conditions for the redistribution of Czech Radio content, including its possible commercial use by a third party, are decided exclusively by Czech Radio based on its strategy. Redistributors must honour, respect and observe the principles defined by the applicable regulations of Czech Radio, and they have no right, for example, to interfere in any way with the integrity of the redistributed content. The relationship between third parties and Czech Radio is governed by the Rules for the Redistribution of Czech Radio Content.

Podcast boom

We consider the period of 2018 to 2021 to be one when podcasts flourished in the Czech environment, when there was a massive increase in the popularity of listening to audio on demand among listeners. The wave that spread to the Czech Republic came from abroad, having started somewhat earlier. In addition to the plethora of new podcasts, this wave of popularity has also brought new ways to make audio available and played online. Many new services have been created specializing in the playback of podcasts, their hosting in the cloud, audience analysis and other rules for the redistribution of Czech Radio content.

Linear terrestrial distribution

Linear terrestrial distribution refers to the transmission of a signal that continuously flows in real time from fixed transmitters and is received by standard antennas (i.e., it is not a satellite or cable transmission). For radio broadcasting, networks of analogue VHF transmitters (FM) or DAB+ digital transmitters are used, or also within the TV broadcasting of the DVB-T2 network.

Digital broadcasting DAB+

The abbreviation DAB - Digital Audio Broadcasting - is the designation for digital radio terrestrial broadcasting. DAB+ differs from DAB mainly in a wider signal band, which allows the transmission of various additional data, such as images, maps, etc. This added function is well visible with DAB radios, which display not only the name of the station, but also the artist and the name of the song being broadcast. Czech Radio distributes through the Czech Radio DAB+ multiplex, among others, all its nationwide stations (Radiožurnál, Dvojka, Vltava, Plus), digital stations (Radio Wave, D major, Jazz, Radio Junior, Radiožurnál Sport, Pohoda Radio Prague International) and all its regional stations. In total, all 25 Czech Radio stations can be tuned to in the DAB+ digital radio.

Digital services for online

Digital services for online means services that are provided via an Internet or electronic network and whose nature makes their provision essentially automated and involves minimal human intervention, and it is not possible to ensure them without the use of information technologies.

Digital services include, for example, plays, e-books, cloud software, websites and audio streaming. This is a precisely defined concept in European and Czech legislation.

Online IP/Internet listening

This means listening to audio over the Internet in the form of on-demand or linear broadcasting. It is made possible, for example, by Internet desk radios (Hama, Technisat, Silvercrest, etc.), websites or mobile apps.

Through an external online partner, Czech Radio operates linear streaming of all stations, which is distributed to online products of Czech Radio and services of selected third parties.

The on-demand audio distribution of Czech Radio is provided from the cloud of its external partner Algotech.

Multimedia services

Based on Act on Czech Radio it may create and distribute complementary multimedia. These are various forms of content distribution that result from a combination of text, audio and image information. An important part of multimedia services is also the interaction with the user and the possibility of consuming content at their own request.

Personalization of content

Content personalization is the modification of the offered content according to the needs of individual users or groups (segments) of users. Segments can be created by age, gender, popular genres or programmes, etc.

Personalization can be varied – from seeing an invitation to register new users of the mujRozhlas portal on the home screen, to a daily unique list of recommended audio to listen to based on the listening history of specific listeners. Personalization can also be carried out using data stored in the browser without the need to log in.

