

YOU GET MORE
RADIO
IN A DIGITAL RADIO

Radio.no

Radio.no

The Norwegian story

1. Why digital radio?
2. Where are we?
3. Why success so far?
4. What's next challenge?



About us

- Digital Radio Norway
 - A industry body owned by P4 and NRK
 - A common voice for the **entire** radio industry
- Main tasks
 - **Information** – for the public and related industries
 - **Operator** – facilitate good and affordable radio distribution
 - The national commercial DAB network
 - 5 regions for local radio
 - Common Internet radio player platform
- Small organization

- 
- **75% of population listening to radio every day**
 - **Avg. 99mins**
 - **96% monthly**

Digital radio

- Digital radio - **3 platforms**
 - Digital broadcasting (DAB / DAB+)
 - Internet
 - Digital tv
- **Broadcasting**
 - Availability
 - Mobility/stability
 - No cost
 - Simplicity

Capacity and networks in Norway

- FM

- 1 channel per transmitter or network
- 5 FM networks
 - 3 NRK
 - 2 commercial
- Various local radio network

Cost per national channel:

1 FM = 8 DAB+

- DAB

- DAB up to 10 channels per network (mux)
- DAB+ up to 20 channels per network (mux)
- Moving towards DAB+
- Frequencies for 4 DAB networks:
 - Public service network (7 regions)
 - Commercial national network ("National 1")
 - Commercial national network ("National 2" - not built yet)
 - Commercial regional network (37 regions)

Why digital radio?

6 - 7 years ago



Now



Now



FM

NRK P1

NRK P2



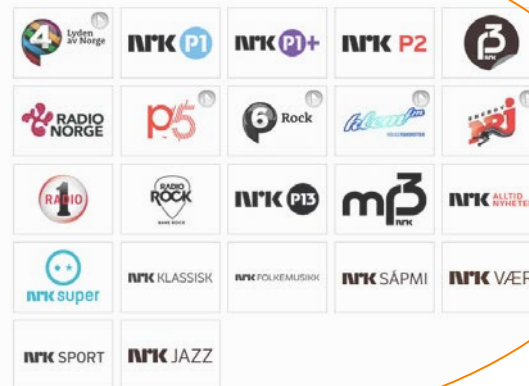
JazRadioen

RADIO NORGE



Now

DAB



Why?

Avoid remain an analogue island

Offer more content

Improve the regulatory framework

Give radio an upgrade

Where are we?

**Norway:
Radio becomes
digital and FM shuts
down in 2017**

2011: White paper



The conditions for FM shut down

- Three absolute conditions
 1. NRK: Coverage as for NRK P1 on FM
 2. Commercial radio: 90 per cent
 3. Added value to listeners

National networks

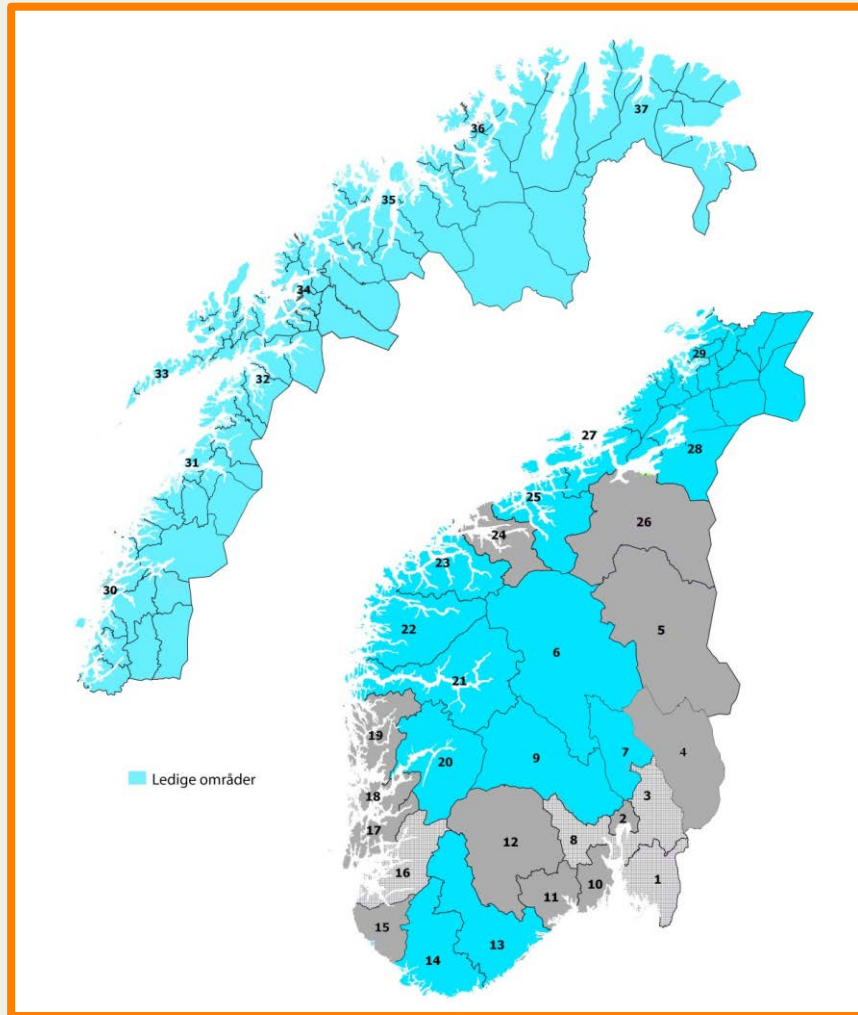


The world's most comprehensive DAB rollout is currently underway

- Autumn/winter 2013:
 - Commercial network completed
- Autumn/summer 2014:
 - Public service network completed



Regional networks



Oslo/Akershus

- 17 local radios on DAB
- Covers > 1,2 mill listeners

Rogaland

- 4 DAB local radios

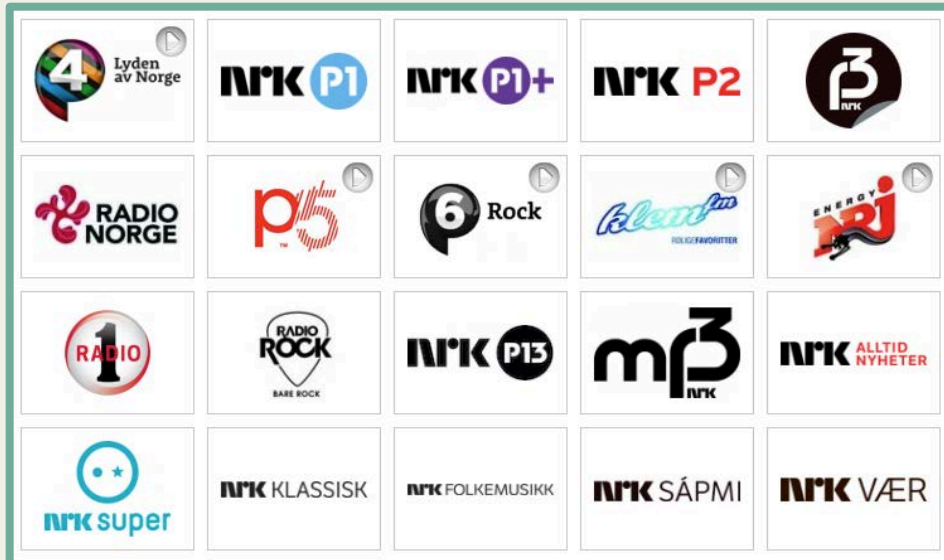
Hedmark

- 3 DAB local radios

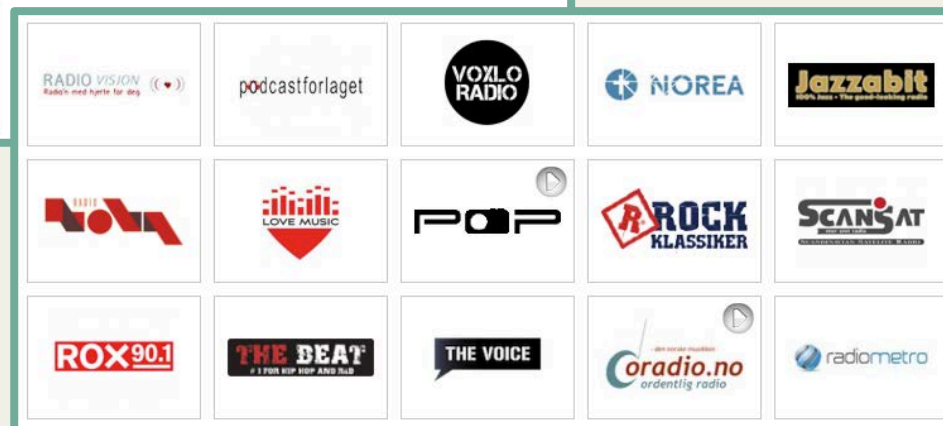
Østfold

- To be opened July

Digital added value



22 national channels
(FM typically 4-6)



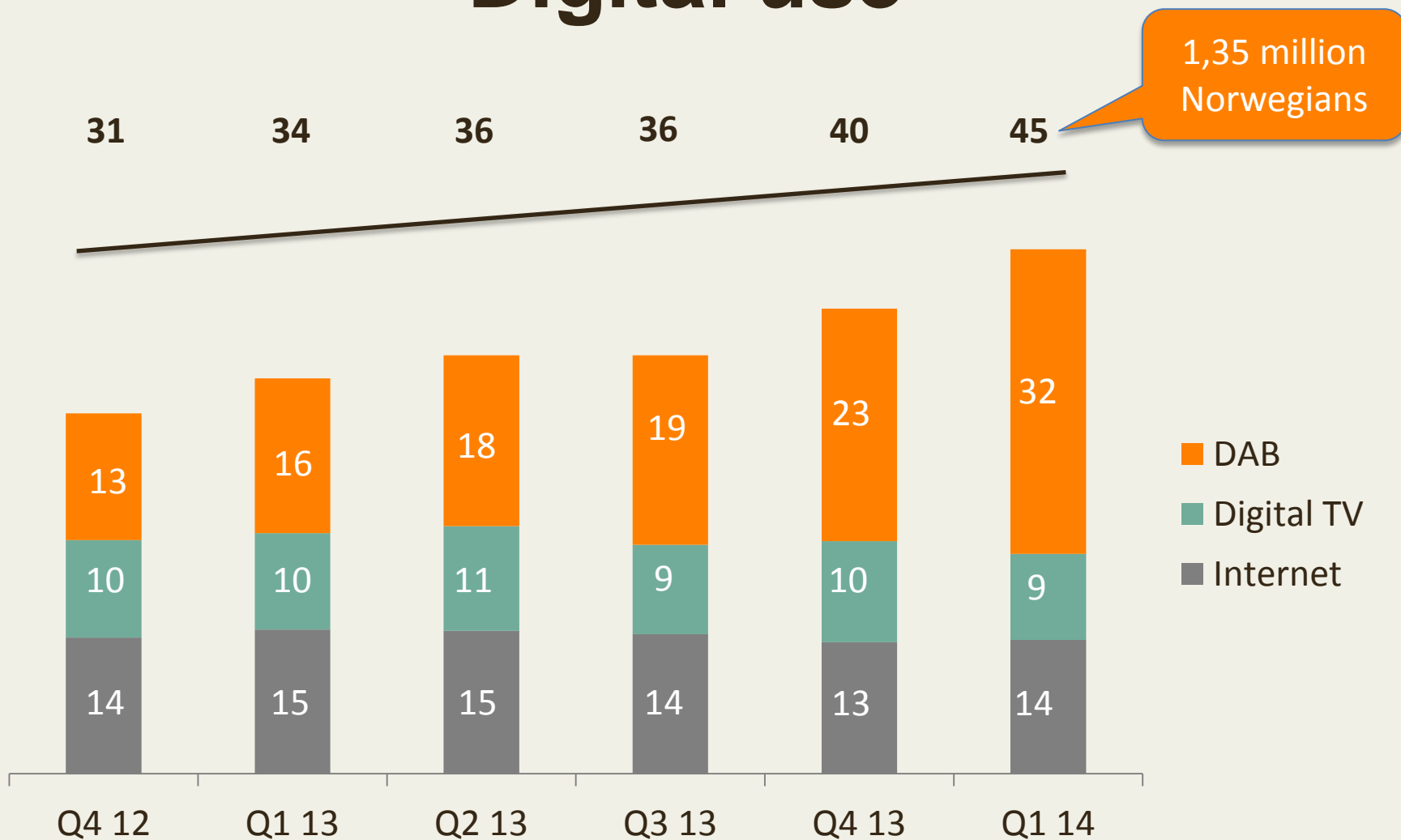
+ 20 channels in Oslo/Aker shus

The conditions for FM shut down

- Three absolute conditions
 1. NRK: Coverage as for NRK P1 on FM
 2. Commercial radio: 90 per cent
 3. Added value to listeners
- 2017 or 2019
 4. At least 50 per cent of daily radio listeners must use digital platforms, exclusively or in combination with FM-radio
 - Digital platforms: web, DAB, digital tv, mobile etc



Digital use



The conditions for FM shut down

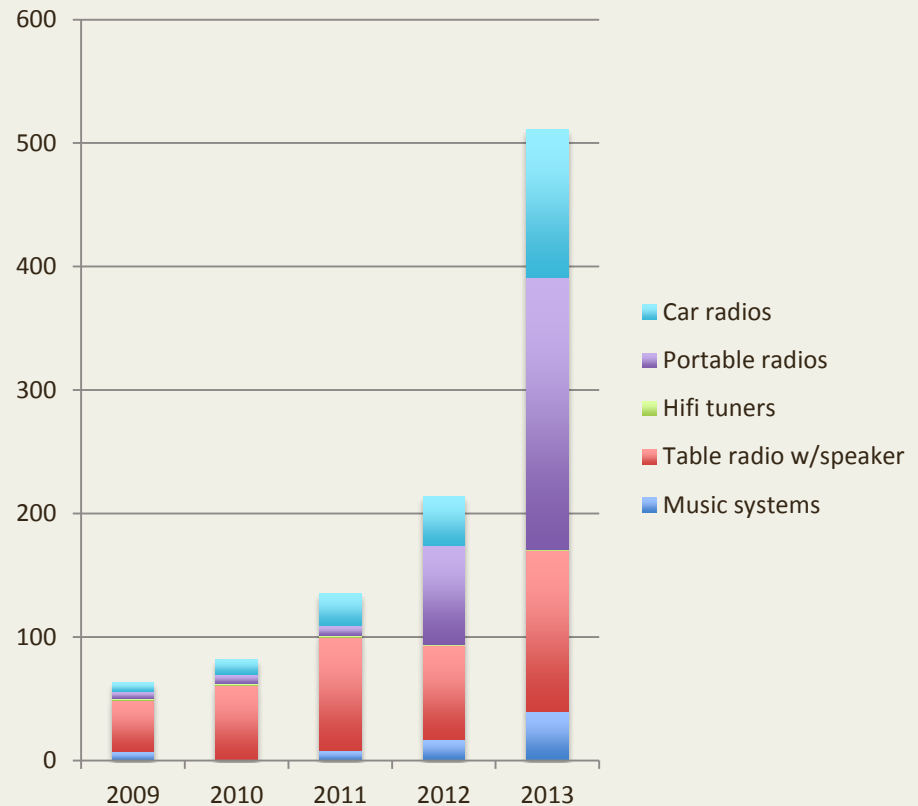
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 - Digital platforms: web, DAB, digital tv, mobile etc
 5. Affordable and technically satisfactory solutions for in-car radio reception must be available
 - Half of the municipalities and all counties must have an offer of retrofitting adapters



2015

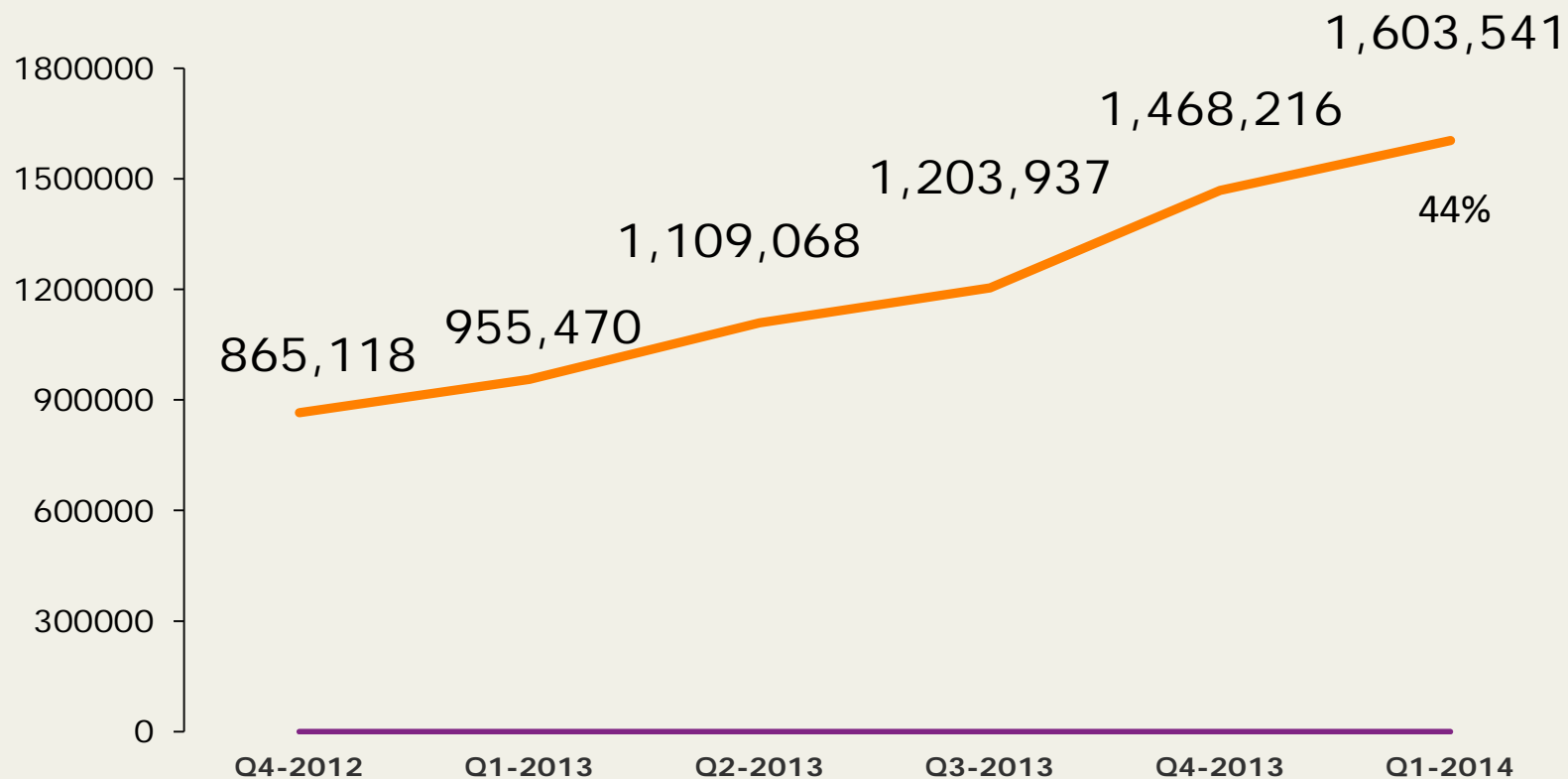
Sales of DAB-radios

- In total, 511.000 DAB-radios sold 2013
 - Incl. car-radio
- More than double of 2012



Source: Trade organisation for electronics importers and retailers

Estimated # of DAB-radios



Source: TNS Gallup, Digitalradiundersøkelsen Q1 2014

Base: n= 960

SSBs number of households: 2 178 723

Consumer electronics trade

Skaff deg en
DAB-RADIO NÅ!
**ALLTID
BILLIG**
hos **Lefdal!**

**OPPLADBART BATTERI!
DAB OG DAB+!**

BESTSELGER!

995,-

**Sandstrøm
DAB-RADIO**
Lyd for alle! 30 Watt og 100% DAB+
med 12000mAh batteri og 100% DAB+
100% DAB+ 100% DAB+ 100% DAB+

**LCD-DISPLAY!
AUX-INGANG!**

BILLIG! DAB
295,-

**DAB OG DAB+!
AUX-INGANG!**

DAB
395,-

**DOBDEL! ALARMINNSTILLING!
DAB OG DAB+!**

DAB
695,-

**MATSUI
DAB-RADIO**
Lyd for alle! 30 Watt og 100% DAB+
med 12000mAh batteri og 100% DAB+
100% DAB+ 100% DAB+ 100% DAB+

**MATSUI
DAB-RADIO**
Lyd for alle! 30 Watt og 100% DAB+
med 12000mAh batteri og 100% DAB+
100% DAB+ 100% DAB+ 100% DAB+

**HITACHI
Inspire the Mass
DAB-RADIO**
Lyd for alle! 30 Watt og 100% DAB+
med 12000mAh batteri og 100% DAB+
100% DAB+ 100% DAB+ 100% DAB+

**BLUETOOTH FOR TRÅDLØS MUSIKK!
BÆRBAR DAB-RADIO!**

**DAB OG INTERNETTRADIO!
(NETT OG WIFI!)**

**TRÅDLØS LYD MED BLUETOOTH!
FEMS I SORT OG HVITT!**

**RADIOMETTE
DAB-RADIO**
Lyd for alle! 30 Watt og 100% DAB+
med 12000mAh batteri og 100% DAB+
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**LEFDAL
ELEKTROMARKED**
ALLTID BILLIG – ALLTID FORNOYD!

For de nærmeste 9999 på
lefdal.com

Besøk oss på www.lefdal.com
for mer informasjon. Tlf. 815 58 800

- Steep **growth** of DAB-sales
- **Marketing** increasingly focused on DAB

Why success so far?

Courage!

Collaboration!

Coverage!

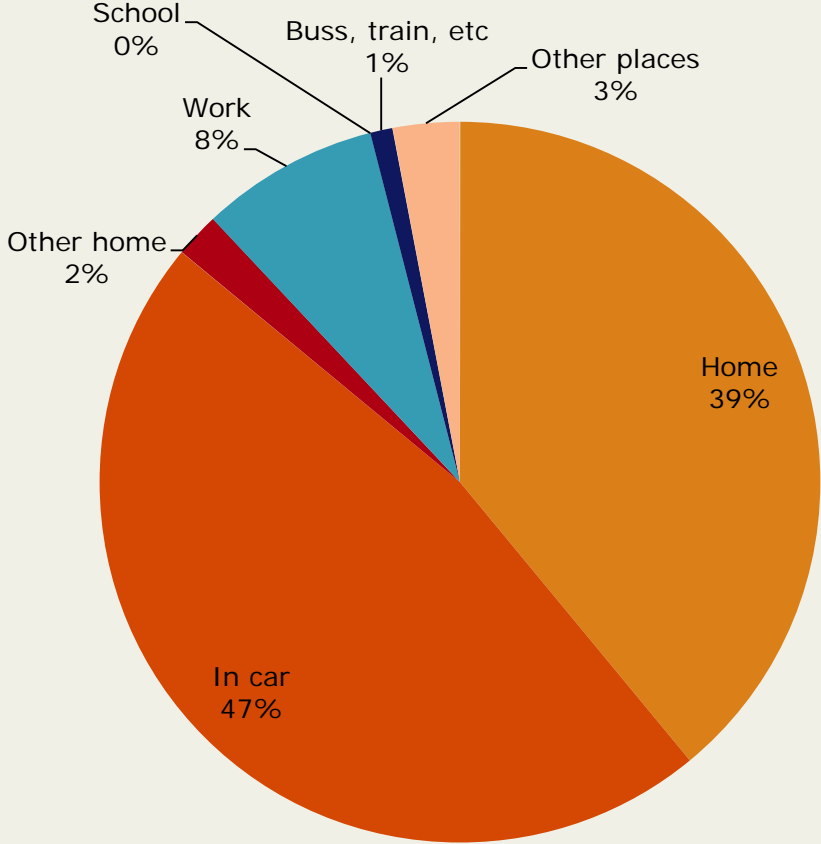
Content!

What's next challenge?

Cars!

Where do people listen?

(previous listening session)



Source: TNS Gallup, Digitalradiundersøkelsen Q4 2013

Base: n = 1068



2/3

The challenge



2 million cars need an **aftermarket** solution

How we work

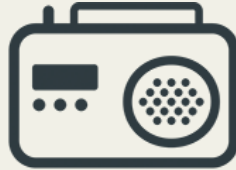
- **Information and competence** in the car industry
- Information and campaigns directed **at consumers**
 - Press and social media
 - Public service and private radio
 - Highlighting in-car DAB, increasing awareness
 - Support for installers' own campaigns
- Stimulating commercial campaigns
 - Offering subsidized radio-commercials to aftermarket installers

Make it available

- Everyone that “lay their hands on” people’s cars
 - Car dealers
 - Workshops
 - Gas stations
 - Tire exchange workshops
 - Parking facilities
 -

Summary

- We digitize to **secure radio's position** in the media market
- The success lies in **collaboration** and a strong political plan
- Norway is **on schedule** for transition to digital radio
 - Great coverage
 - New content, wide range of channels
 - 45 per cent of daily listeners use digital radio
- Close to 60 per cent of all sold radios are digital
- Focus on **car industry**
- Highest priority now is **DAB aftermarket products** for cars



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Radio.no

Ole Jørgen Torvmark

torvmark@radio.no

+47 924 30 600

@torvmark

Radio.no