

# **DAB digital radio: international update**

Patrick Hannon

*Istanbul, 29<sup>th</sup> May, 2015*

# Contents

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1. Introduction

2. International progress

3. Reasons for growth

4. Conclusions

# WorldDMB – who we are

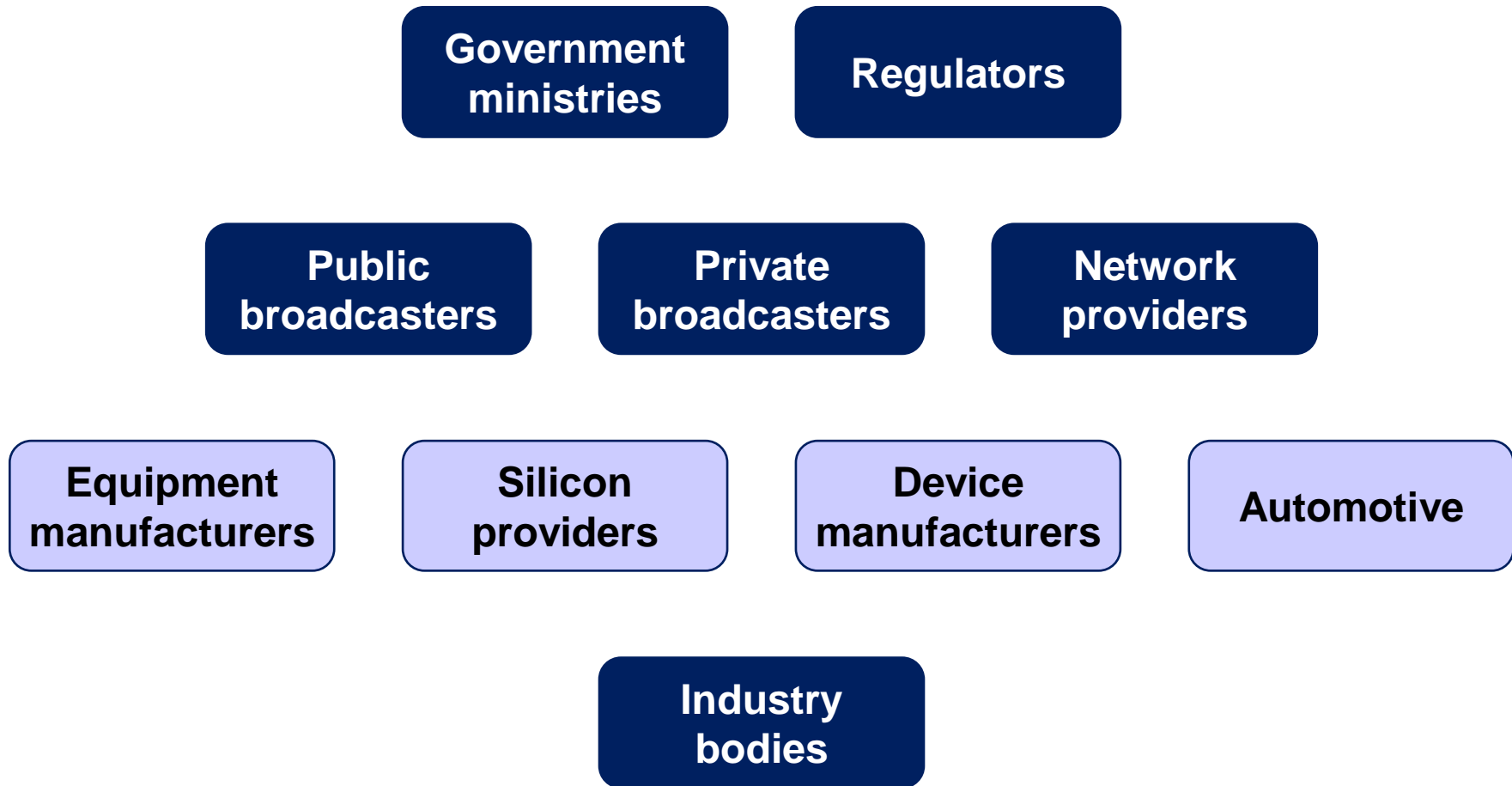
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- Not-for-profit membership organisation
- Developed DAB technical standards
- Promote digital radio (DAB / DAB+) around the world

# 90 members from 28 countries – across radio ecosystem

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1. Introduction



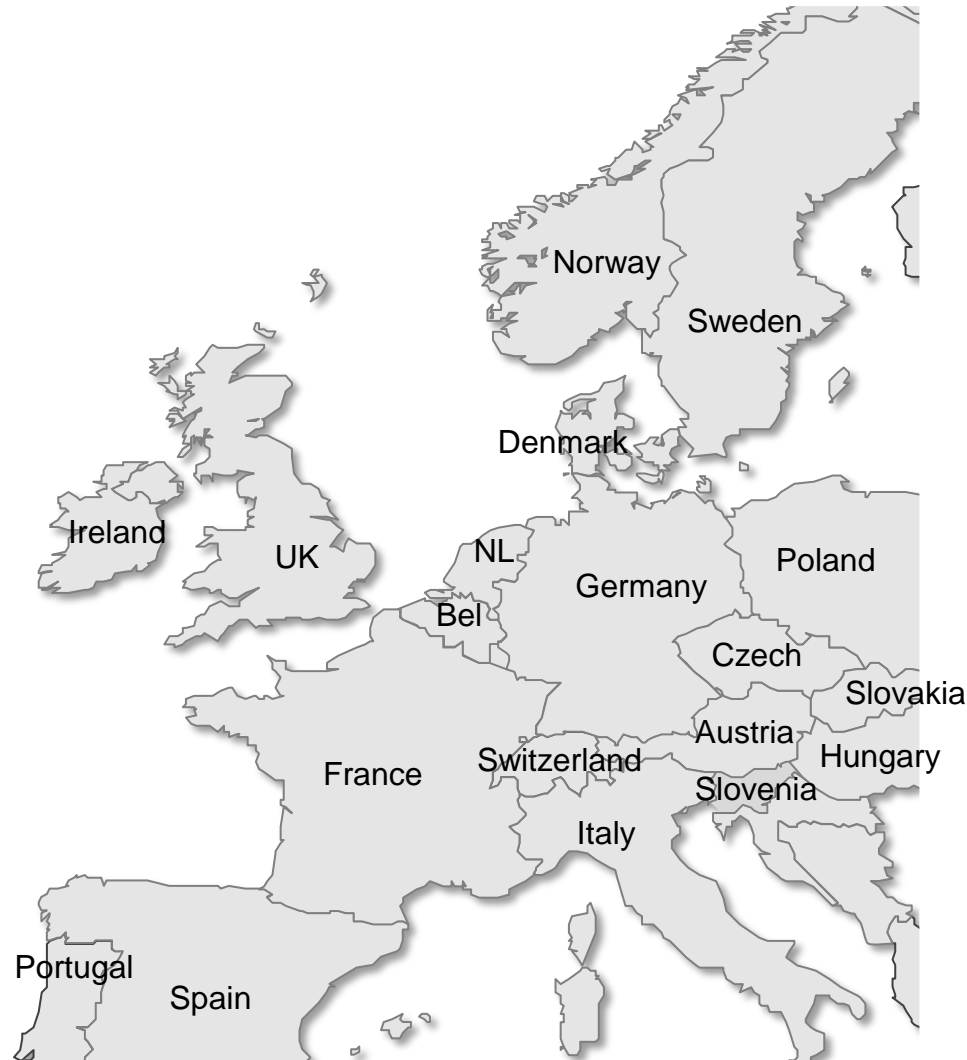
2. International progress

3. Reasons for growth

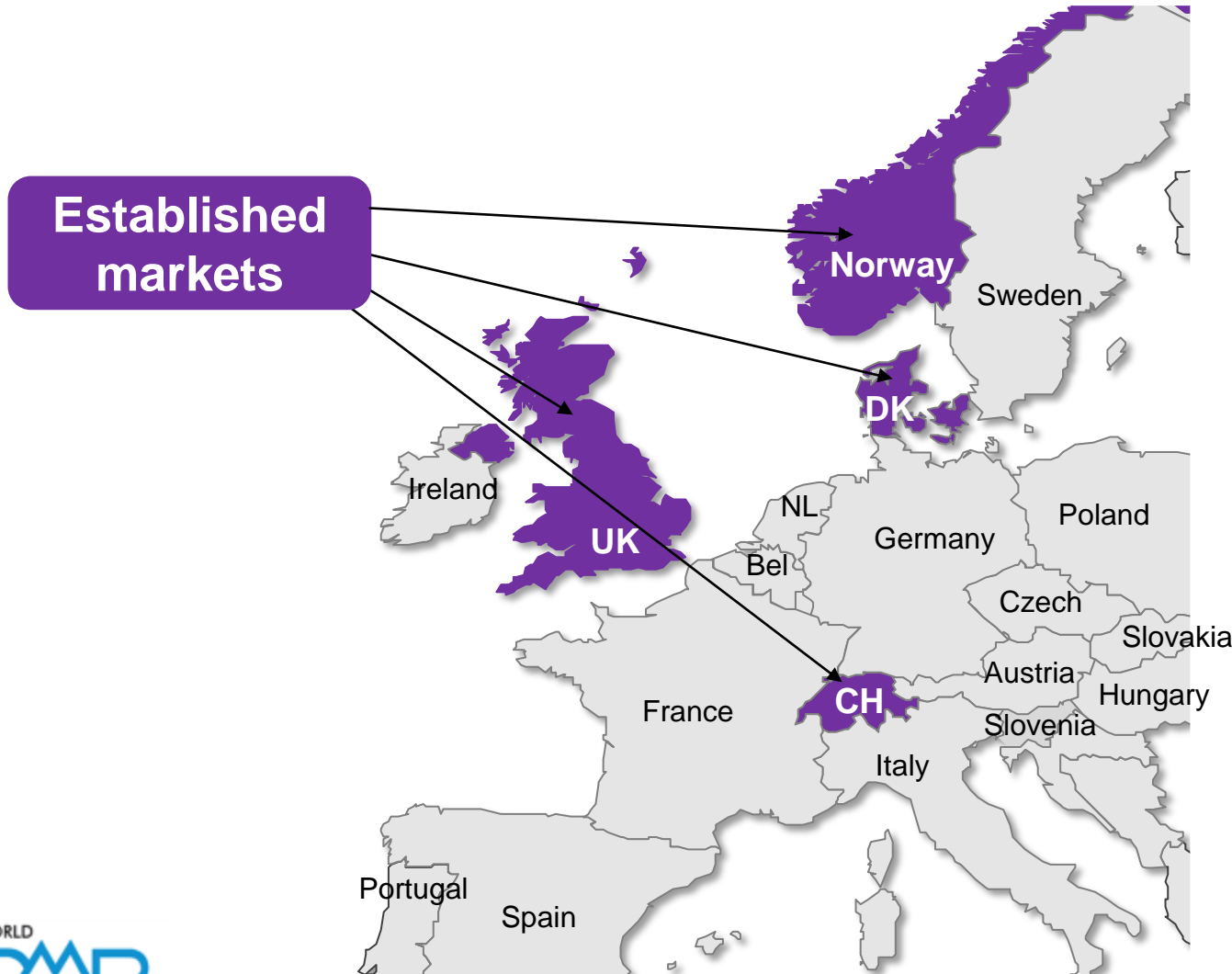
4. Conclusions

# A digital radio wave is moving across Europe

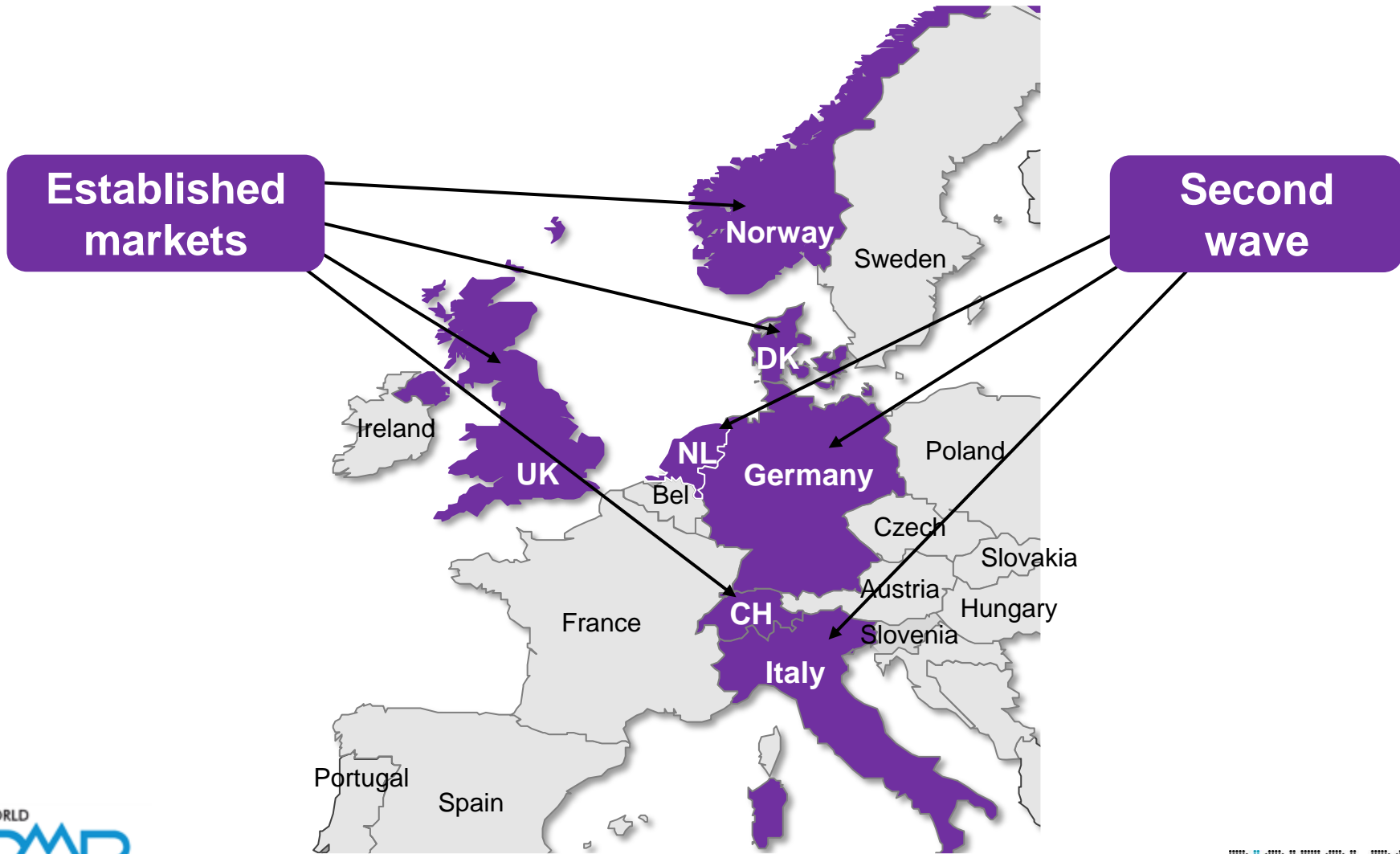
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# Four core markets: UK, Norway, Denmark and Switzerland



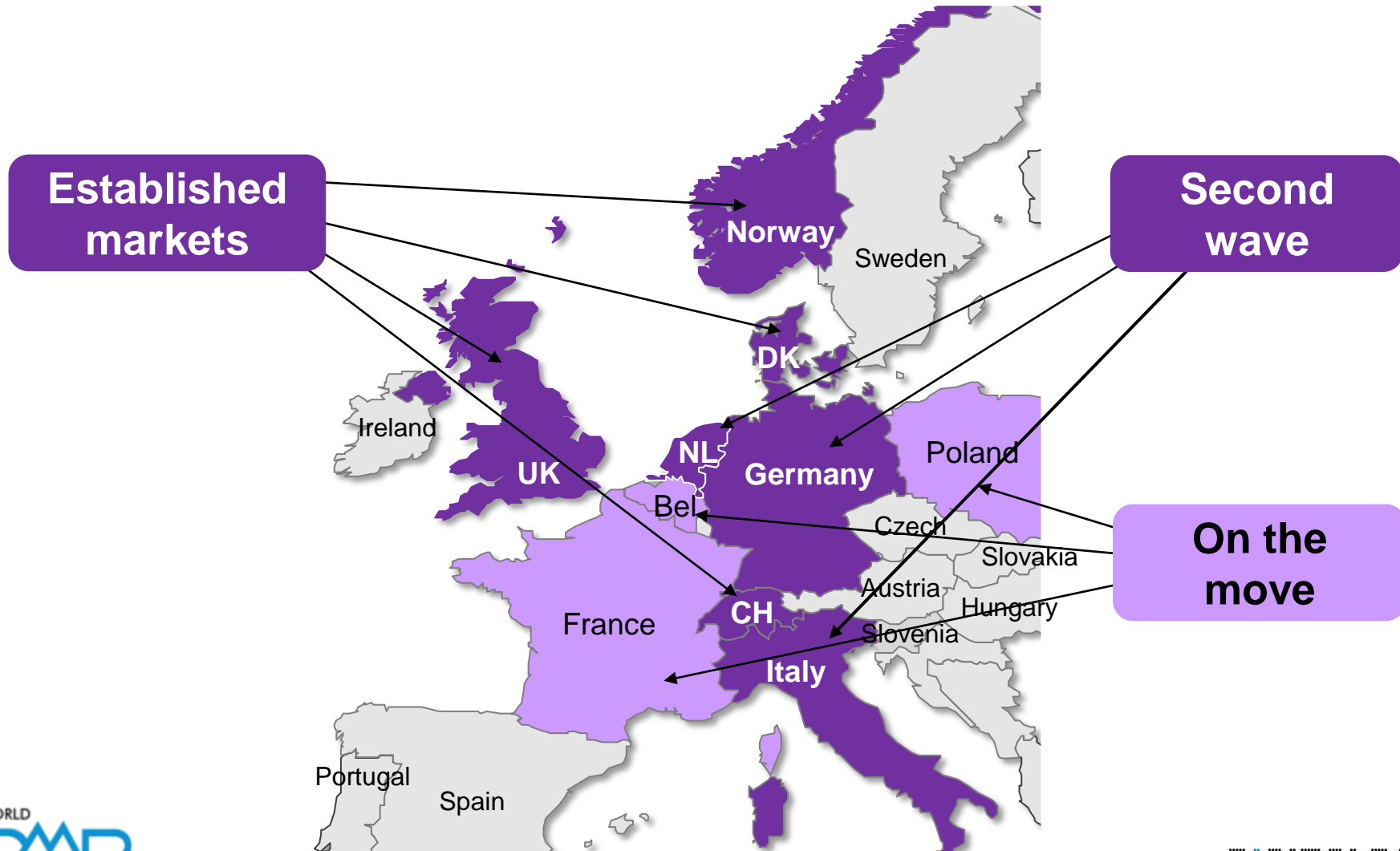
# Followed by Germany (2011), Netherlands (2013) and Italy (2014<sup>1</sup>)



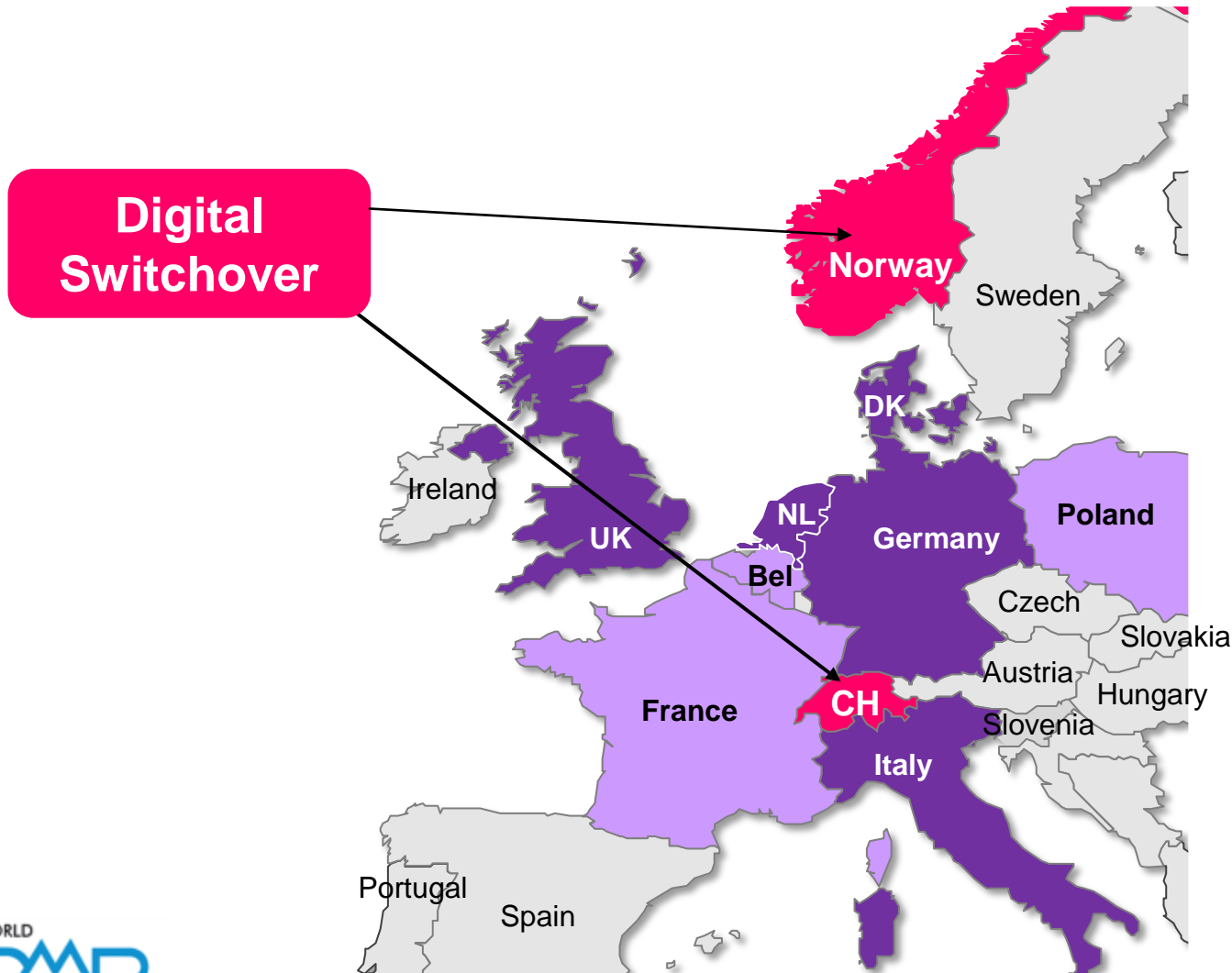
(1) Year second national commercial mux was granted formal licence



# Poland, France and Belgium – on the move



# First countries moving to Digital Switchover



# Norway: first to have digital switchover - in 2017

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- Digital Switchover in 2017 confirmed (April 2015)
- 57% of listeners use digital
- DAB coverage: 99% (better than FM)

# Switzerland: digital switchover in 2020-24

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- DSO in 2020-24 (Dec 14)
- 39% of households have DAB
- DAB+ coverage: 99%

# Germany: long term commitment to DAB+

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- Nov 14: ARD confirms commitment to DAB+<sup>1</sup>
- Apr 15: Ministry for Transport and Digital Infrastructure (BMVI) calls for Industry Steering Board
  - to define milestones for a roadmap to switch-off

# UK, Denmark and Netherlands all progressing

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- UK: “Future of radio is digital”
  - Coverage 95%
  - 360 new transmitters; new national commercial multiplex
- 



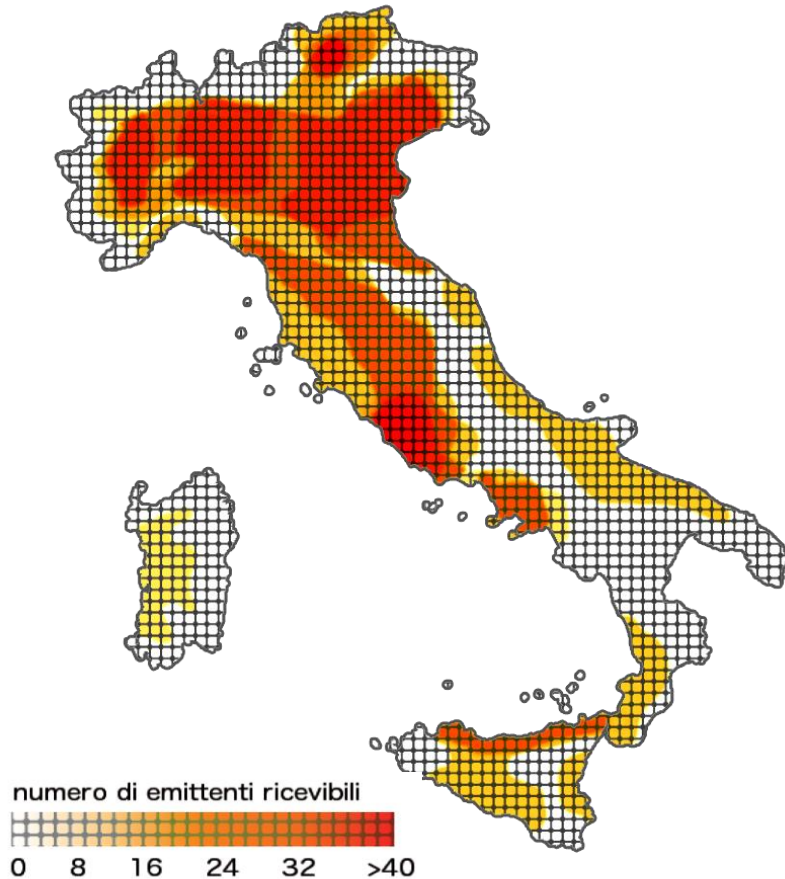
- Denmark: Coverage 98%
  - New roadmap published 2015 – “FM switch-off is inevitable”
- 



- Netherlands: 28 national services on air; now launching regional DAB+

# Italy – coverage 68% of population

## Coverage map



- Two national commercial muxes
  - 68% population coverage
  - 4,500 km of roads
- Licences for new regions announced in Dec 2014<sup>1</sup>
- Heavyweight marketing – including for digital radio in cars

(1) Following launch in Trentino in 2013 - Piedmont, Umbria and Valle d'Aosta announced in 2014

## Third wave: countries on the move

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- France: DAB+ in Paris, Nice and Marseille
  - Public consultation on 20 more cities / zones
- 



- Poland: Polskie Radio on DAB+ in 18 cities: 53% population coverage
- 



- Belgium: DAB+ commercial multiplex launched in Brussels May 2015



# In Asia Pacific, a similar process is under way

**Vietnam: DAB+ trial 2013**

**Thailand: DAB+ trial 2015**

**Malaysia: DAB+ trials on air in Kuala Lumpur**

**Indonesia: DAB+ trial on air in Jakarta**

**S Korea: interest in DAB+**

**China: DAB in Beijing & Guangdong**

**Hong Kong: DAB+ launch 2011**

**NZ: DAB+ trial on air in Auckland**

**Australia: DAB+ launched Jul 2009**



# Australia – leaping ahead – and providing advice

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- DAB+ launched 2009
  - five major cities
- 23% household penetration
- 100k cars with DAB+ as standard
- Published guide to launching DAB+ trial<sup>1</sup>

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# FM spectrum is full

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- No new services
- No innovation
- Long term decline

# Benefits for listeners

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## Benefits

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graph TD; Benefits[Benefits] --- Sound[1 Sound]; Benefits --- Tuning[2 Easy tuning & information]; Benefits --- Services[3 New services];
```

1

### Sound

- Clean reception
- No interference
- No crackle and hiss

2

### Easy tuning & information

- Each service is easy to find
- Station and artist information

3

### New services

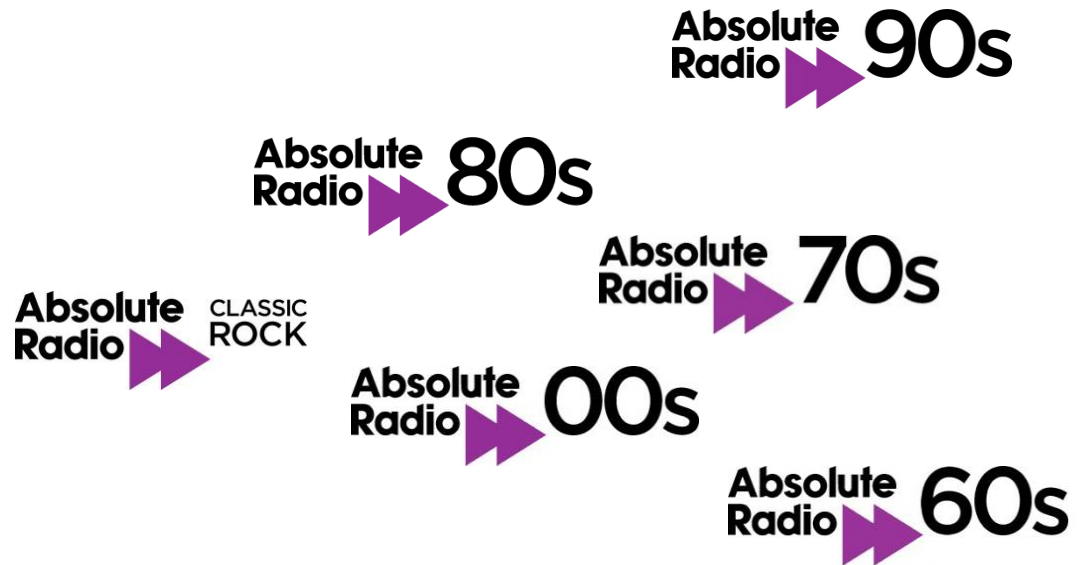
- New audio services
- New data services

# Pop up stations – for range of events



# Case study: extend the brand portfolio

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*Analogue and digital*

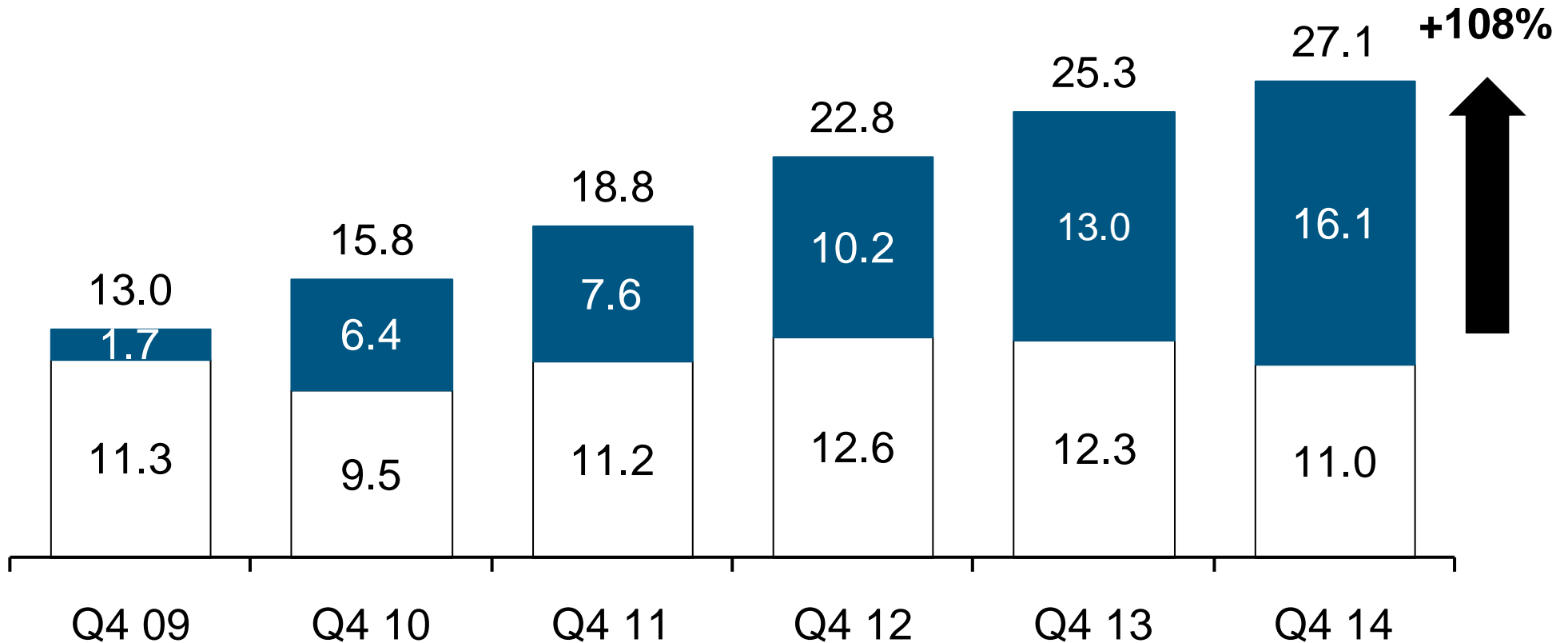
*Digital-only services*

# Listening hours - up 108%

## Weekly listening hours, millions

□ Absolute Radio (core service)

■ Absolute digital-only services



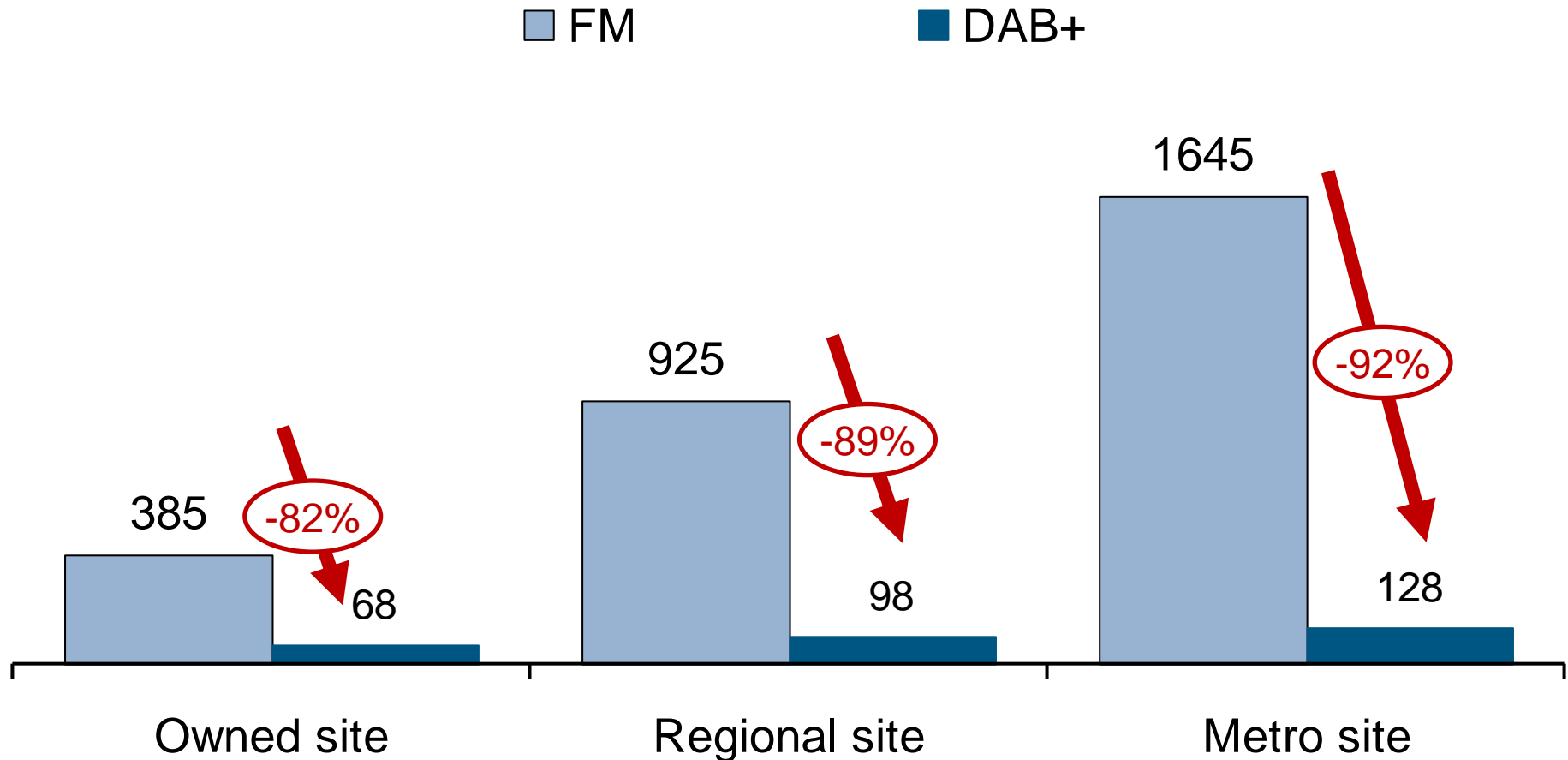


# Depending on IP, especially on the move, would be high risk

Issue	Internet	DAB / DAB+
Robust for mass audiences (including emergencies)	X	✓
Free to air (no subscription)	X	✓
Middleman / cost effective distribution	X	✓

# Digital radio offers highly efficient distribution

Annual cost to broadcasters of transmission per service<sup>1</sup>, \$k



# Digital radio offers Emergency Warning Functionality

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- Mobile coverage not robust
- Radio with people at home, at work and on the move
- Digital radio Emergency Warning Functionality offers
  - automatic announcements
  - for all stations on multiplex

# DAB / DAB+ and connectivity should work together

## DAB Digital Radio

Robust, free to air, cost-effective ...

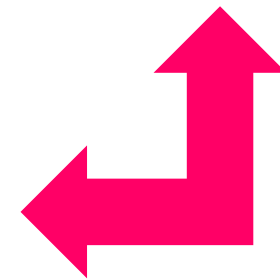
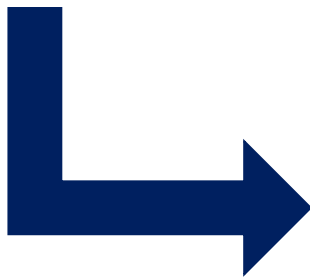
- Audio / multimedia content
- One-to-many
- Always “on”
- No bandwidth saturation



## Connectivity

Interactive, personal, car to car...

- Any internet content
- Social & community services
- Personalized data delivery
- eCall



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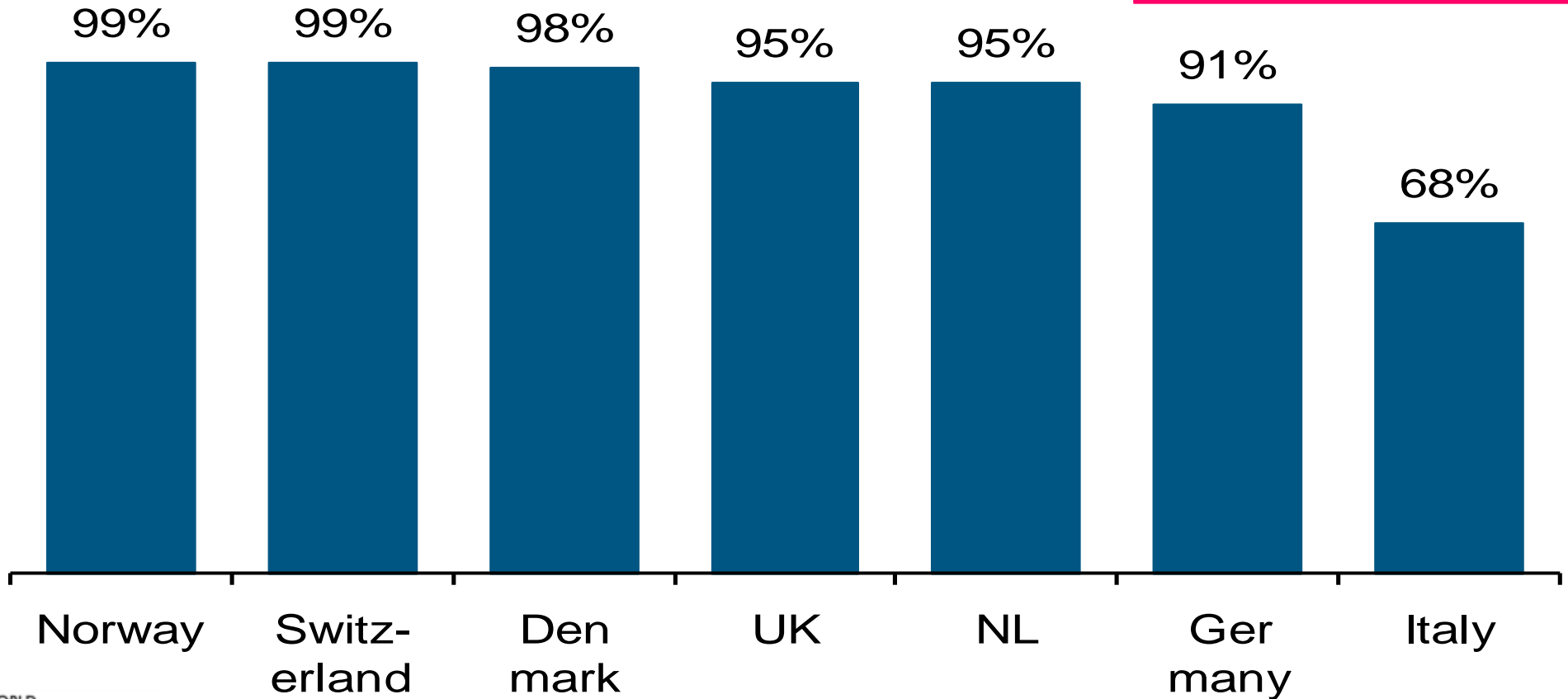


4. Conclusions

# Digital radio in Europe is at a tipping point

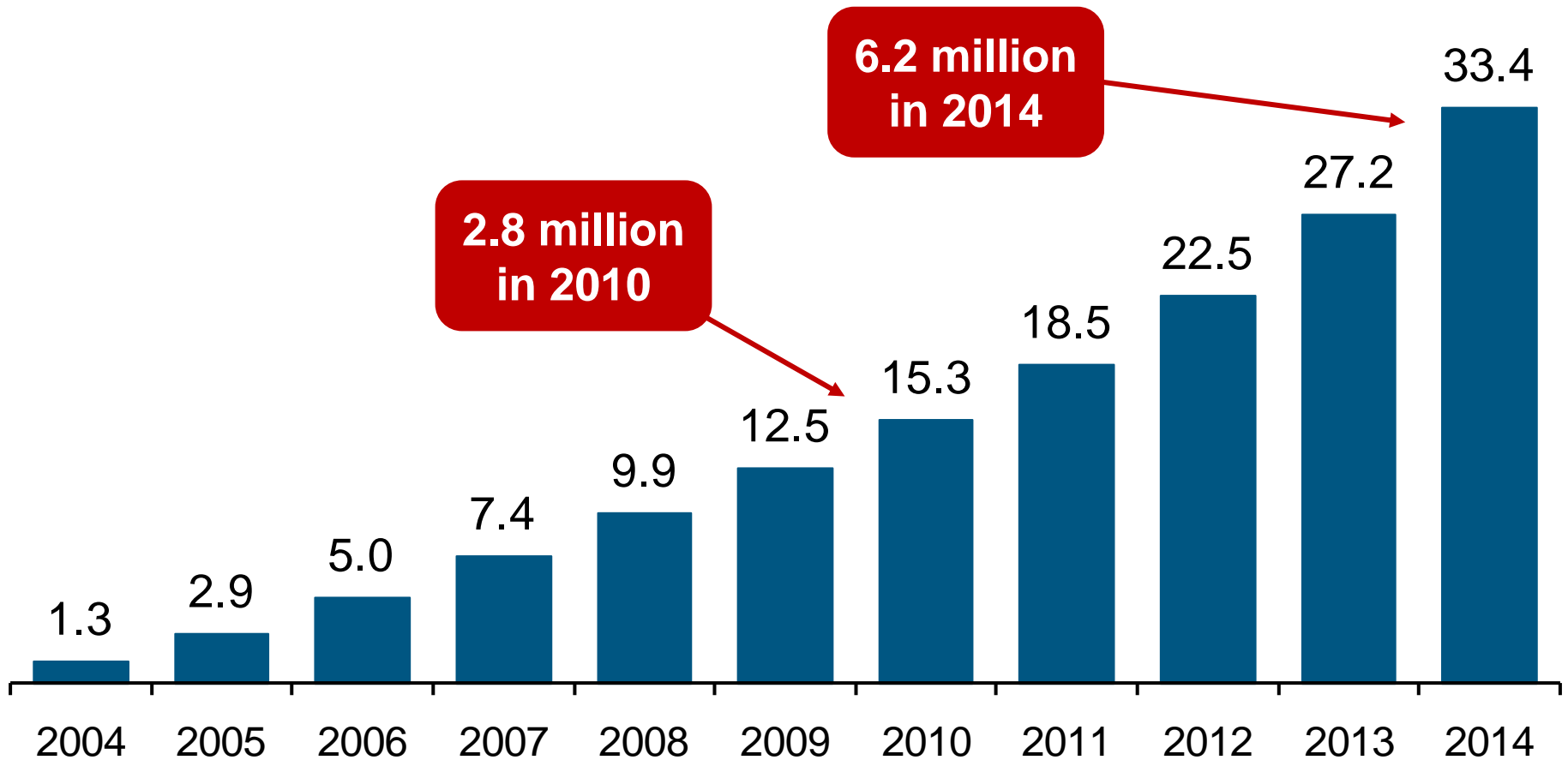
DAB / DAB+ population coverage

Seven countries:  
60% of new car  
sales in Europe



# Since 2004, 33 million DAB / DAB+ receivers sold

DAB receiver sales (domestic & line fit automotive), million



# The market is ready - over 400 consumer devices available

Prices  
from €20

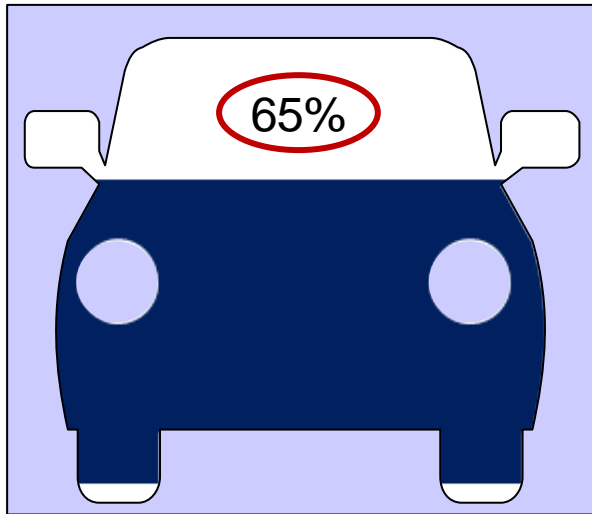




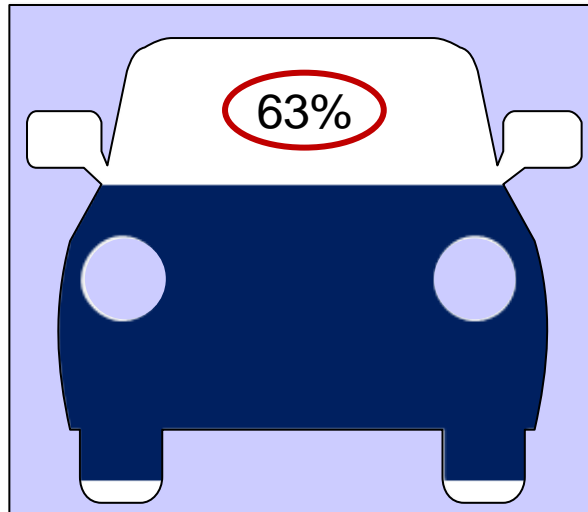
# In developed markets, many new cars have DAB and FM

% of new cars with DAB+ digital radio

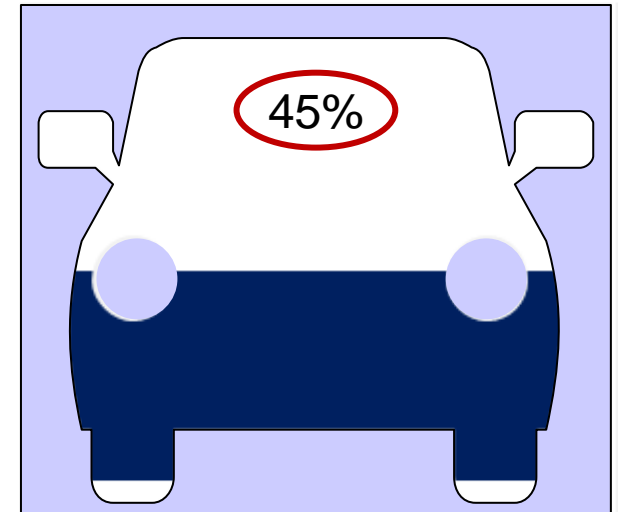
Technology is  
tried and tested



UK



Norway



Switzerland

# Devices to convert existing cars are available

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Solutions available for all major manufacturers

# Markets are sharing marketing concepts

DIGITALRADIO  
IL SUONO PERFETTO

DIGITALRADIO  
LOVE RADIO? GET DIGITAL

DIGITALRADIO  
*Radio der Zukunft*

DIGITALRADIO  
LET'S GET DIGITAL

DIGITALRADIO  
DU FAR MER I EN DIGITAL RADIO

DIGITALRADIO  
DIE ZUKUNFT DES RADIOS

DIGITALRADIO  
DAB+

# Conclusions

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- 1 Europe at tipping point: first seven countries being followed by next wave
- 2 Market is ready for mass market adoption – consumer devices and automotive digital radios now mainstream
- 3 Strong benefits for Turkish radio and Turkish listeners – now is the time for action

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# Thank you

*For further information, please contact:*

[www.worlddab.org](http://www.worlddab.org)