

538

RADIO
VERONICA

SkyRadio

RADIO
10

DAB+ in the Netherlands:

CONTENT LANDSCAPE & STRATEGIES

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RADIO NEWCO - NETHERLANDS





DAB+ : 0% to 5% share of radio listening in 3 years

Genesis of DAB + : The Netherlands

2003

- “Zero-base” FM frequency reallocation
- 9 national FM commercial licenses issued for 8 years

2011

- Government offers 6-year extension to incumbents, conditional on...
- Commitment to launch DAB+: 40% outdoor coverage by end of 2013.... 80% by end 2015
- + 1 program offering on DAB+
- Automatic extension in 2017 with switch-over commitment “if 50% of radio listening is digital”

2017

- New 5-year extension offered based on commitment for switch-over to DAB+ by 2023
- If DAB+ not empirically proven success, threat of new FM zero-base auction in 2023

Current DAB + coverage: Netherlands

Commercial
National

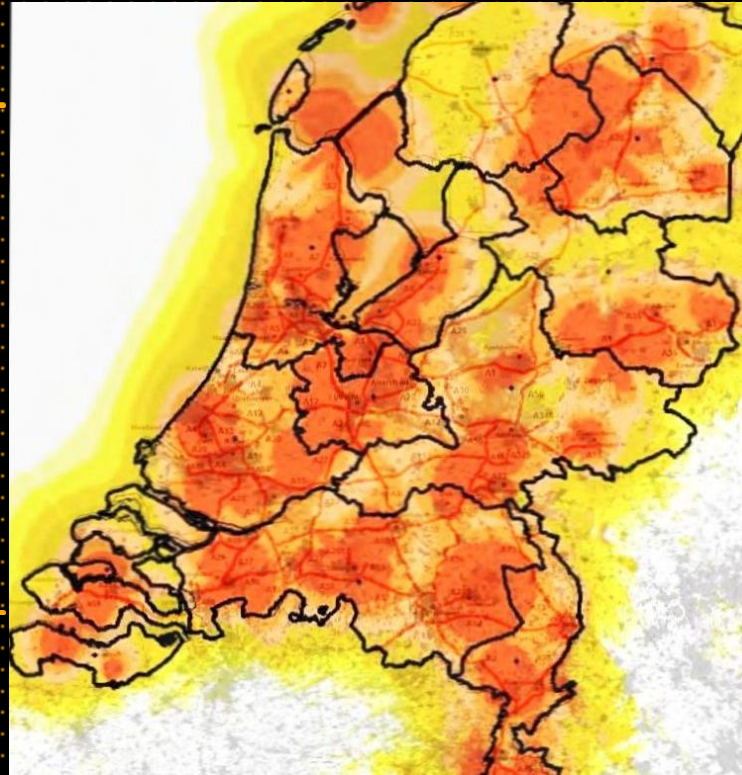
Multiplex 11C

- Outdoor: 100%
- Indoor: 40%
- Target 2017: Indoor 80%
- 18 radio programs (9+9)

Public
National

Multiplex 12C

- Outdoor: 100%
- Indoor: 40%
- Target 2017: Indoor 80%
- 14 radio programs (6+8)



Current DAB + coverage: Netherlands

Commercial
Regional

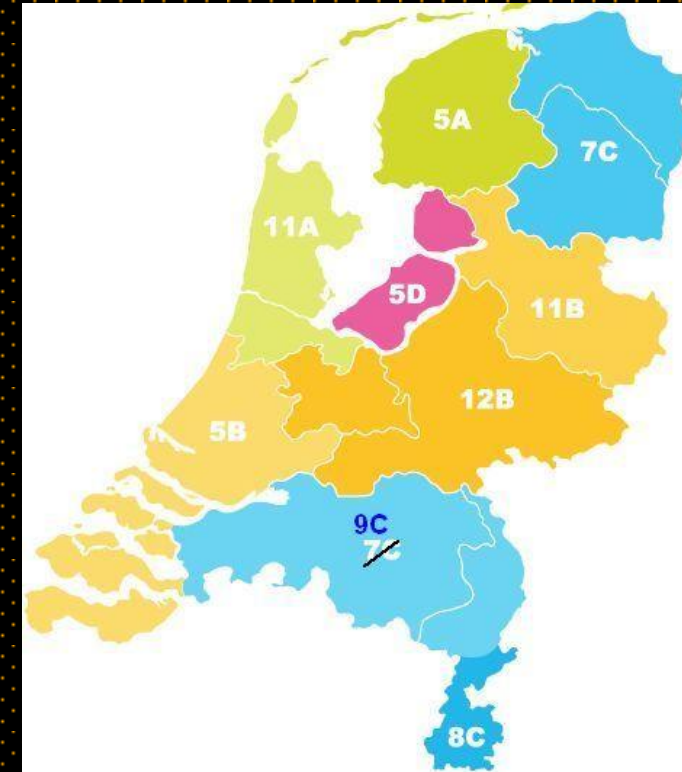
6B, 7A, 8A and 9D

- 5 regions with 100% combined outdoor coverage
- 16 regional programs
- 2018: One additional group of 5 regions to be auctioned

MTVNL TV
network

(Add-on radio channels)

- 6 additional radio programs with various degree of coverage



Program descriptions: commercial

Program name	Content	Group
<u>Sky Radio</u>	Female-oriented AC	Radio Newco (SRG prior to 2016)
Sky Radio Xmas	Christmas/Specialty	Radio Newco (SRG prior to 2016)
<u>Radio Veronica</u>	Male-oriented AC	Radio Newco (SRG prior to 2016)
<u>Classic FM</u>	Classical Music	Telegraaf Media Group
<u>Qmusic</u>	Hot AC/CHR	PersGroep
Qmusic non-stop	Hot AC/CHR	PersGroep
<u>BNR Nieuwsradio</u>	Financial/General News	Financiele Dagblad
<u>Arrow C R</u>	Classic Rock Music	Arrow CR
<u>SLAM!</u>	Youth-oriented dance	RadioCorp
Retro Hits	Oldies Music	RadioCorp
<u>Radio 538</u>	Top 40/Hot AC	Radio NewCo (Talpa prior to 2016)
538 Top 40	Top 40	Radio NewCo (Talpa prior to 2016)
<u>Radio 10</u>	Pop Music	Radio NewCo (RadioCorp prior 2016)
Radio 10 Gold	Oldies Music	Radio NewCo (RadioCorp prior 2016)
<u>Sublime</u>	Jazz Music	Sublime
Sublime You	Current Affairs	Sublime
<u>100%NL</u>	Dutch-language pop music	RadioCorp
Radio Maria	Religious	R Maria

Program descriptions: public

Program name	Content	Group
<u>NPO Radio 1</u>	Current Affairs	NPO
<u>NPO Radio 2</u>	AC	NPO
<u>NPO 3FM</u>	Hot AC/Alternative	NPO
<u>NPO Radio 4</u>	Serious Classical	NPO
<u>NPO Radio 5</u>	Oldies Music	NPO
<u>NPO Soul & Jazz</u>	Jazz Music	NPO
<u>NPO FunX</u>	Rap & Ethnic pop	NPO
<u>NPO 3FM Alternative</u>	Alternative	NPO
<u>NPO SterrenNL</u>	National ("Schlager")	NPO
<u>NPO 3FM KX Radio</u>	Rock	NPO
<u>NPO Radio 4 Concerts</u>	Live/Concerts	NPO
<u>NPO FunX Dance</u>	Dance & Ethno	NPO
<u>NPO FunX Sl.Jamz</u>	"Slow Jams"	NPO
<u>NPO Evenement en Nieuws</u>	News & Current affairs	

Content strategies

Brand reinforcement

- Radio NewCo + Q Music
- Co-branded, TSL-drivers
- Cost-efficient, short- to mid-term strategy

Reach/demographic increase

- RadioCorp: non-cobranding formats
- Veronica + Classic FM

Mixed

- Public radio: combination of co-branded and format extensions

DAB+ content enhancers (open-ended tune-in reasons)

Oldies

- Radio 10 Gold, Retro Hits, Radio 5
- “Missing from FM dial”

Specialty

- Christmas, “Summer-hits”, children programming

Ethnic/foreign language

- FunX stations, BBC World Service (pending)

Content Strategy: 2017 and beyond

Multi-variant radio
(cross-used
spoken content)

Specialized
spoken content
(themed talk +
native marketing)

English-language

Event radio