



Why radio is robust in a competitive audio environment



Michael Oschmann
November 6, 2018



Radio: 95 years of age

AM

- Oct. 29, 1923
First AM signal in Berlin;
no one listened
- End of 1923
467 listeners and they had
to pay
- End of 1925: More than one
million listeners with a
boost during the 1930s...

UKW/FM

- Feb. 28, 1949
FM started in Munich
- Expansion of FM
coverage into the 90s
- 99 % FM coverage
for 237 radio programs

DAB+

- Launch: August 1, 2011
Expansion of DAB+
continues until today
- Coverage:
98 % outdoor – 89 % indoor
- Population:
89 % supplied (73.186 mio.)
- Today: 229 DAB+ radio
programs

Development of DAB+

2011

August 2011: Beginning of DAB+ Broadcasting

- 11 programs
 - 8 private programs
 - 3 public programs
- DAB only plus simulcast
- First private nationwide programs

The pioneers



Development of DAB+

2018

Status: October 31, 2018

- ● 162 private programs
- ● 67 public programs
- > DAB only plus simulcast programs
- > nation, statewide, regional/local

An example: Berlin/Brandenburg

mabb medienanstalt_berlin_brandenburg

DAB+ Angebot in Berlin und Brandenburg

dab+

Ballungsraum Berlin
Kanäle 7B und 7D

94.3 **RS2** 98.8 **KISS** FM BR BAYERN **plus** BR **KLASSIK** BR BAYERN **plus** BERLINER **REINPUNKT 91.4** **JAM 97.9 FM** **JUMP**
ULU FM **MAX FM** **hitradio** **nice** **pure** **radio 82+** **RADIO GORHAMNS 1** **radio GOLOS**
89.2 **Flow** **STAR SAT RADIO** **SWR >> AKTUELL** **SWR3** **TOP STATION** **WDR 2**

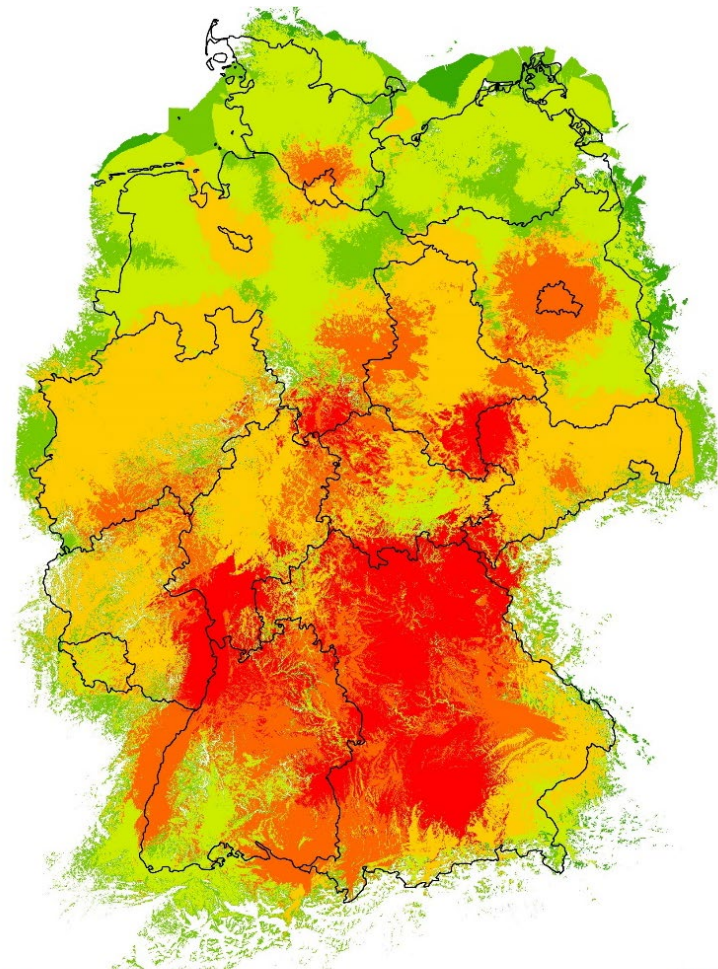
Berlin und Brandenburg
Kanäle 10B und 12D

104.6 RTL **105.7 Schwarzwald** **antenne** **BB RADIO** **big** **COSMO 7** **tomradio** **Pop**
mitz **104** **INFORADIO** **kulturradio** **PELI ONE** **POWER RADIO** **radio 82+** **radioBERLIN**
94.5 **radioehs** **Paloma** **98.2 PARADISO** **ROCK** **rockland** **star fm**

bundesweit
Kanal 5C

Absolut relax **Deutschlandfunk** **Deutschlandfunk Kultur** **d** **Deutschlandfunk Plus** **SWR 1** **Plus** **BOB!**
Klassik Radio **Schlagertunes** **Schwarzwald Radio** **sunshine live** **Rock in Pop**

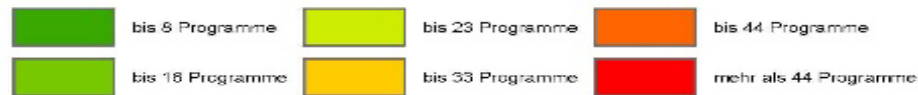
Stand: September 2018



Heatmap

Distribution of DAB+ programs throughout Germany

Status: Sept. 2018

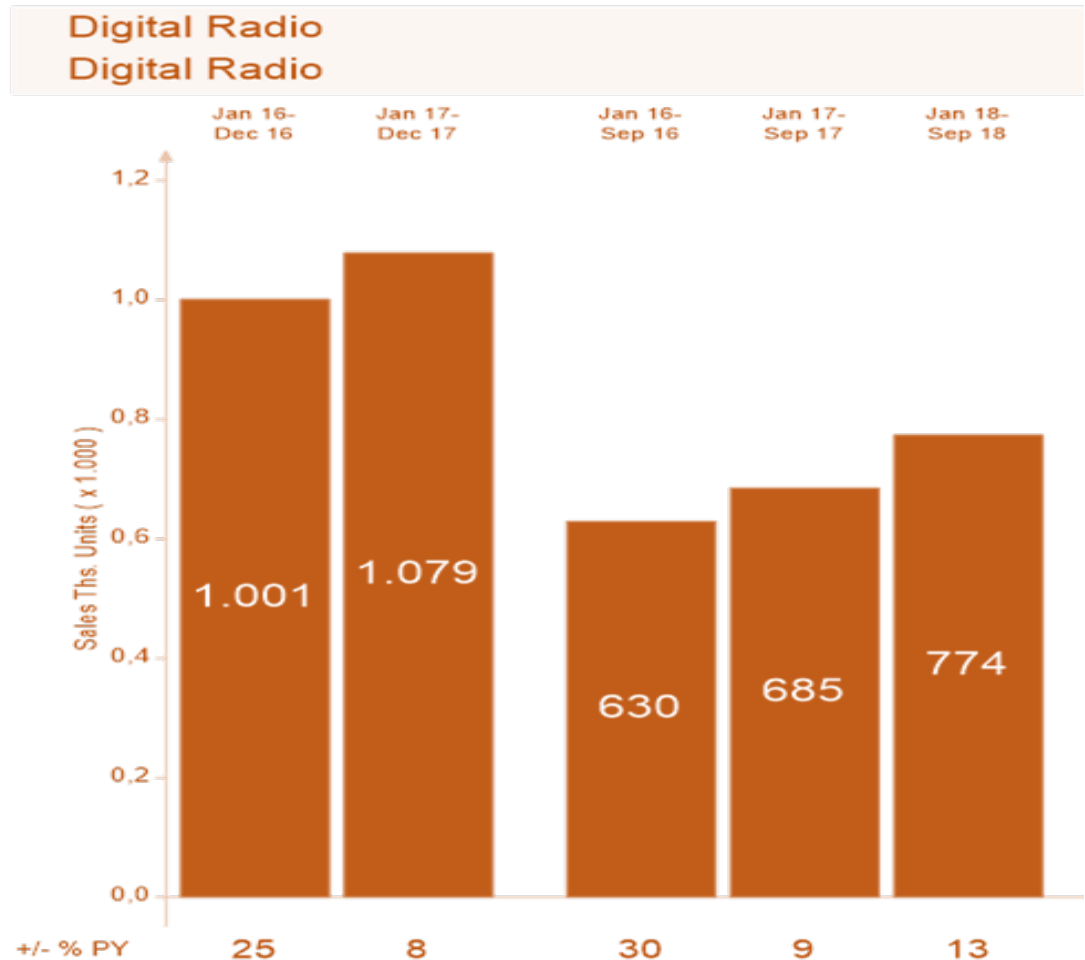


Landesgrenzen © Bundesamt für Kartographie und Geodäsie, Frankfurt am Main

GfK – Germany Panel market



Sales of digital radios
Jan. – Dec. 2016 and 2017
Jan. – Sep. 2016, 2017 and 2018

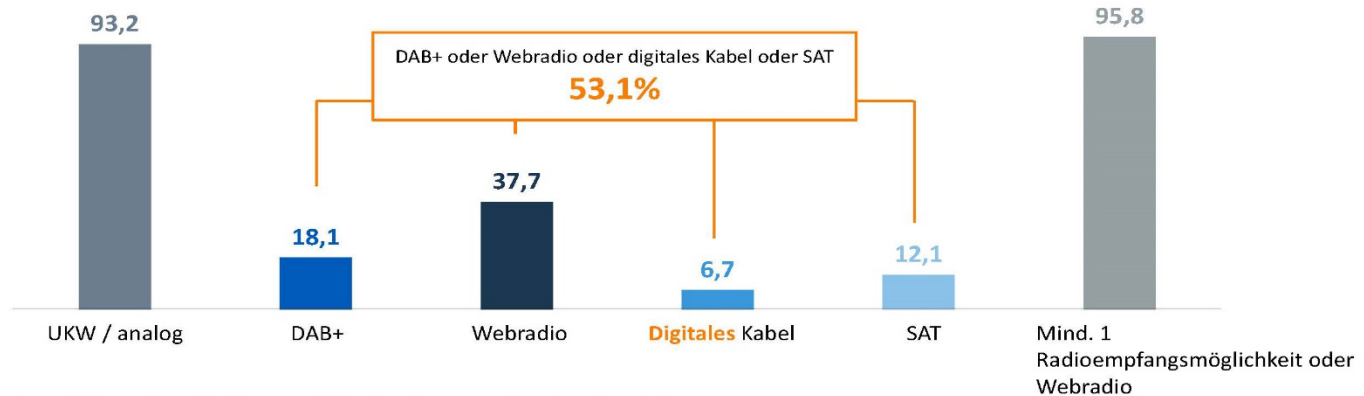


Listener reached by multiple channels



Radio-Übertragungswege im Vergleich – Personen

Alle digitalen Nutzungsmöglichkeiten berücksichtigt, hat mehr als die Hälfte Zugang zu mindestens einer digitalen Radioempfangsmöglichkeit oder nutzt Webradio.



Angaben in Prozent; Webradio definiert als: nutzt Webradio zumindest gelegentlich an irgendeinem Gerät
Basis: 70,094 Mio. Personen ab 14 Jahre in Deutschland

Kantar TNS – Radio-Digitalisierungsbericht 2018

19

Distribution channels of radio programs in comparison:
More than 50 percent has access to either DAB+ or uses web radio.

Multiple ways to user and listener

Strong radio brands are also successful via internet



agma TM ma IP Audio		
Werbeträger Online-Audio	2018 Q2	2018 Q1
ANTENNE BAYERN antenne (simulcast)	6.701.833	7.159.457
HIT RADIO FFH Simulcast	2.877.098	3.057.350
ROCK ANTENNE rockantenne (landesweit simulcast)	2.715.792	2.762.597
RADIO PALOMA	2.711.135	2.648.843
radio ffn	1.716.416	1.746.225
sunshine live - Simulcast	1.540.575	1.309.487
bigFM Deutschlands biggste Beats	1.466.316	1.481.568
Radio Hamburg Simulcast	1.332.652	1.298.689
planet radio simulcast	1.033.642	1.053.907
104.6 RTL Simulcast	1.017.594	1.171.054
I Love Radio	990.466	1.284.232
Antenne Niedersachsen OnAir (Simulcast)	822.728	881.813
Hitradio antenne 1 simulcast	770.297	822.357
Klassik Radio	720.407	967.678

Studie:	ma 2018 IP Audio III - Teil 2 Meldezeitraum
Publikation:	Werbeträger Online-Audio
Ausweisungszeitraum:	2018 Q2
Ausweisungseinheit:	Ø Sessions pro Monat

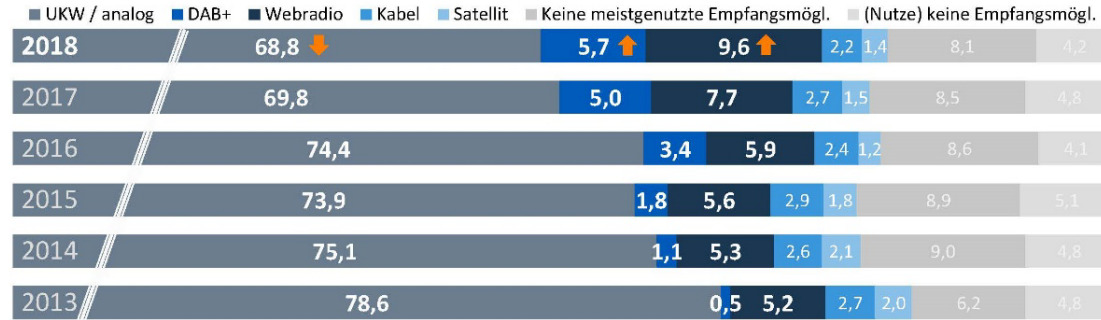
Challenges

Listener reached by multiple channels



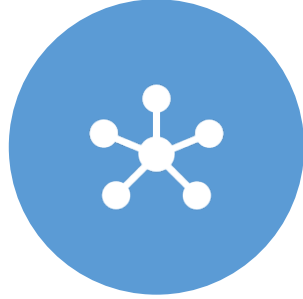
Meistgenutzte Radioempfangsart im Trend

UKW verliert innerhalb von 5 Jahren mehr als 12 Prozent. Webradio legt um mehr als 80% zu, DAB+ mehr als verzehnfacht!



Angaben in Prozent; die Angaben zur am häufigsten genutzten Radioempfangsart beziehen sich auf die zum Haushalt gehörenden Radiogeräte (in der Wohnung oder im Auto). Nicht berücksichtigt ist die „Außer Haus“-Nutzung an fremden Geräten.
Basis: 70,214 / 70,326 / 70,525 / 69,241 / 69,563 / 70,094 Mio. Personen ab 14 Jahre in Deutschland

Digital radio listening (internet and DAB+) is on the rise—FM silently loses listeners in the long run (10 percentage points within 5 years)



Full coverage in all states
of Germany for private
and public radios
Use of all frequency capacity



Regulatory standards for
interoperability
(Multinormchip for
Germany and Europe)



Legislative initiative:
No renewed tender of FM
frequencies once abandoned
As option: New DAB+ programs
should be aired on abandoned FM
frequencies as time-limited
promotion

What has to be done?



Car industry:
DAB+ radios must
become standard in all
new cars
... and why not to
introduce incentives for
2nd market devices?



Manufacturers / large
market chains should
join the „Digitalradio
Verein Deutschland“
to better address the
needs of the industry



Joint initiative for
advertising of
manufacturers on
DAB+ programs (up
to now not a single
spot has been paid)



Sales of DAB+
advertising by the
two marketing-
dominating radio
marketeers (RMS,
AS&S)

What has to be done?

Multiple channels team up to success



DAB+ as
terrestrial basis



Internet: web channels
for specific audiences
(interactive communication,
targeting)



Opportunities

Addressing the de-bundling/new ecosystems



New distribution channels with
new business models
(e.g. Smartphone,
Smartspeaker, ...)



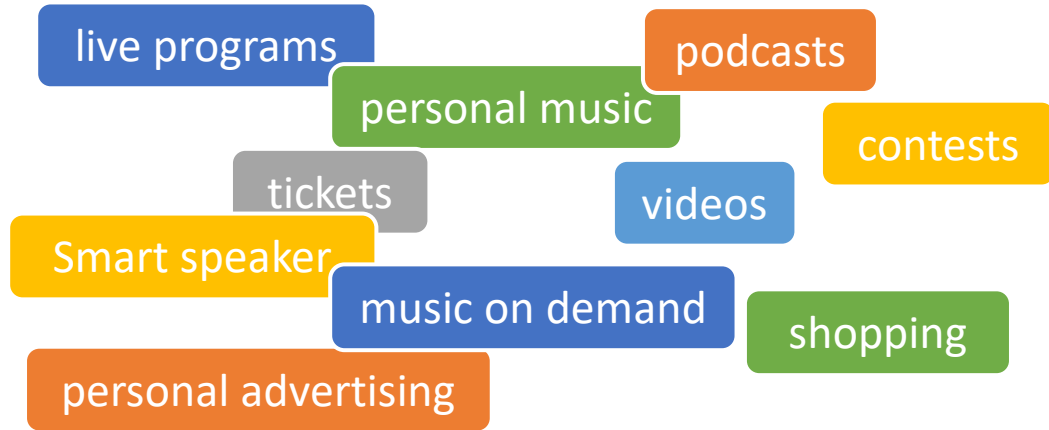
New technical infrastructures
(programmatic advertising)



New human and sensors
involved in programming/
formats

Challenges

Radio emerging into an entertainment & transactional platform



... and keeps its positive spirit



**Thank you
for your attention!**

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