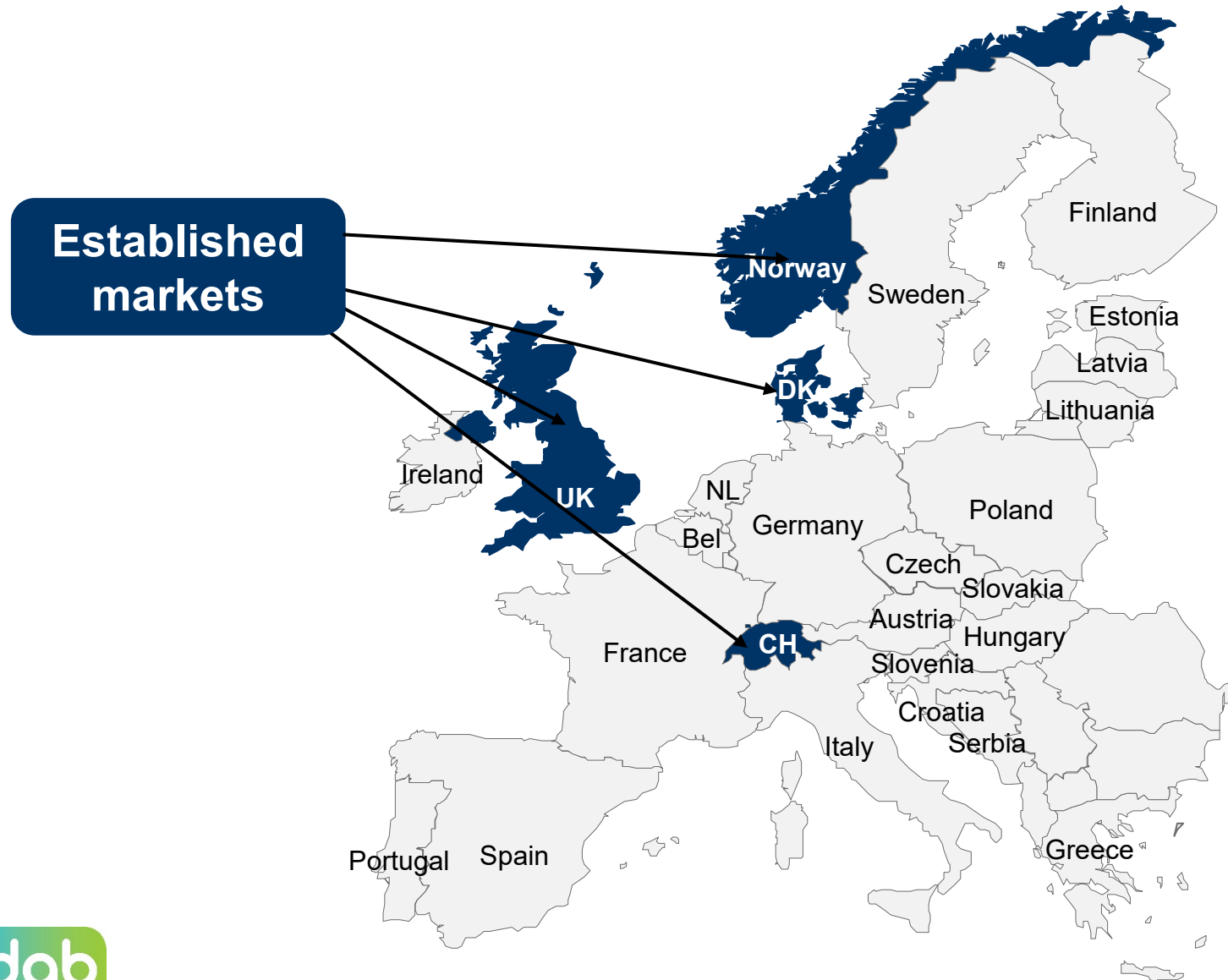


DAB - the way ahead




Patrick Hannon, President, WorldDAB

General Assembly, Berlin, 7 November 2018

Eight years ago, four DAB markets in Europe



Today: DAB established across the continent

-  *Established*
-  *On the move*
-  *Trials*



First countries are switching off FM



Norway: 2017



Switzerland: 2020-24

Good progress in other established markets



Germany: strong political support
- rapid expansion of services



Italy: law that receivers must be
digital from 2020



Netherlands: 1 million
DAB+ radios sold



Belgium: now an established
market



Australia: three new cities
in 2019



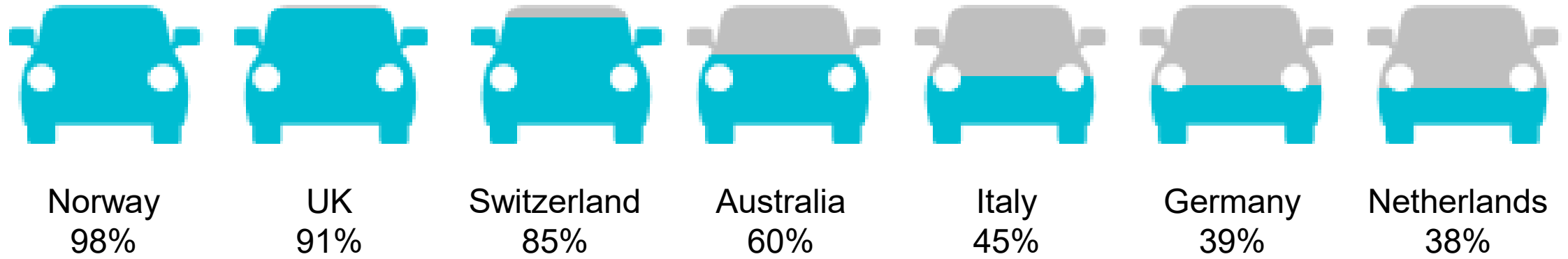
UK: record levels of digital
listening - 52% of total

France – DAB+ is on the move



- Six cities on air by December
- Call for interest in national multiplex
- 20% population coverage expected by end 2018

Growing number of new cars with DAB



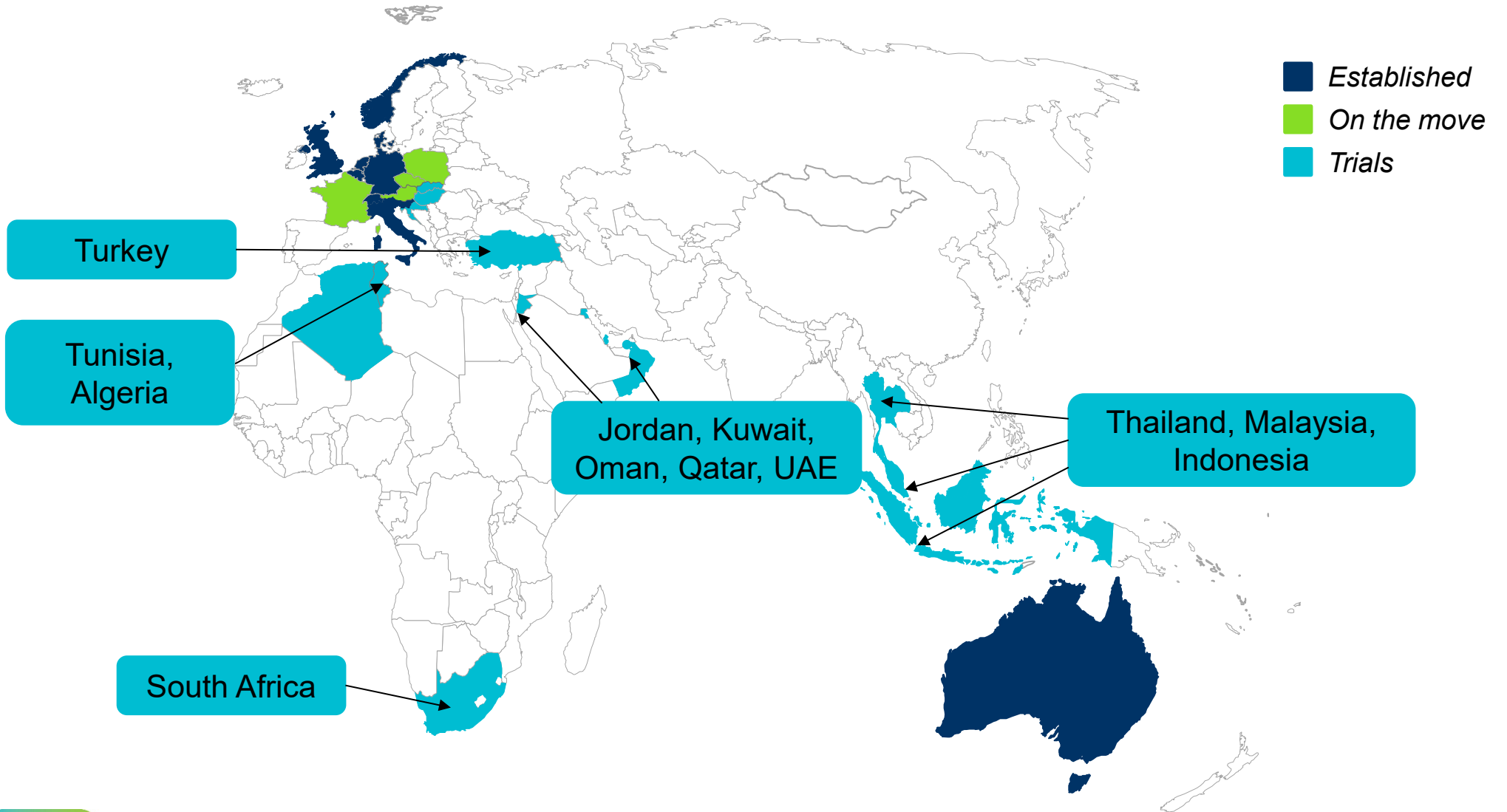
EU support for digital radio



European Electronic Communications Code:

- All new car radios in EU able to receive digital terrestrial radio
- Expected to be adopted end of Q1 2019
- Member States have two years to transpose into national legislation

Not just a European story



What is driving these changes?

Radio plays key role in lives of Europeans



- 1 85% of Europeans listen to radio each week
- 2 Radio: the medium most trusted by European citizens

Digital giants are invading radio's space



Tech giants bringing their own devices



Amazon Echo Dot



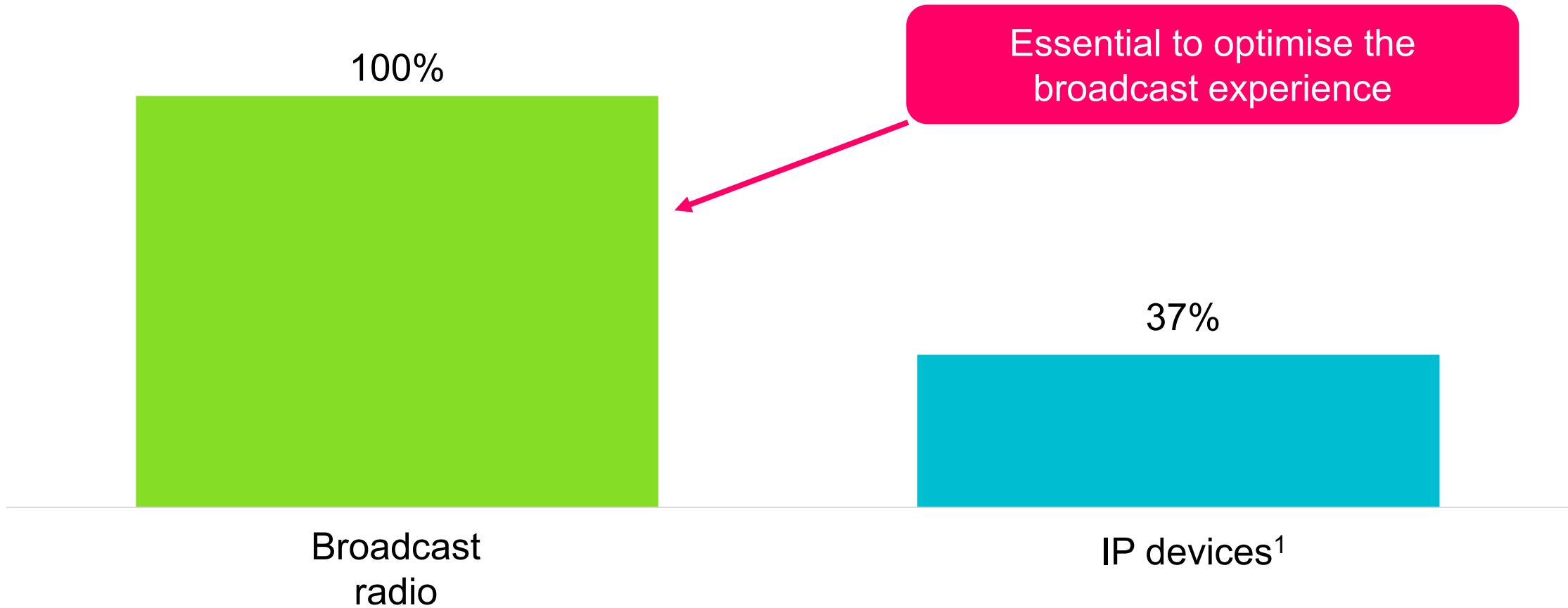
Google Home



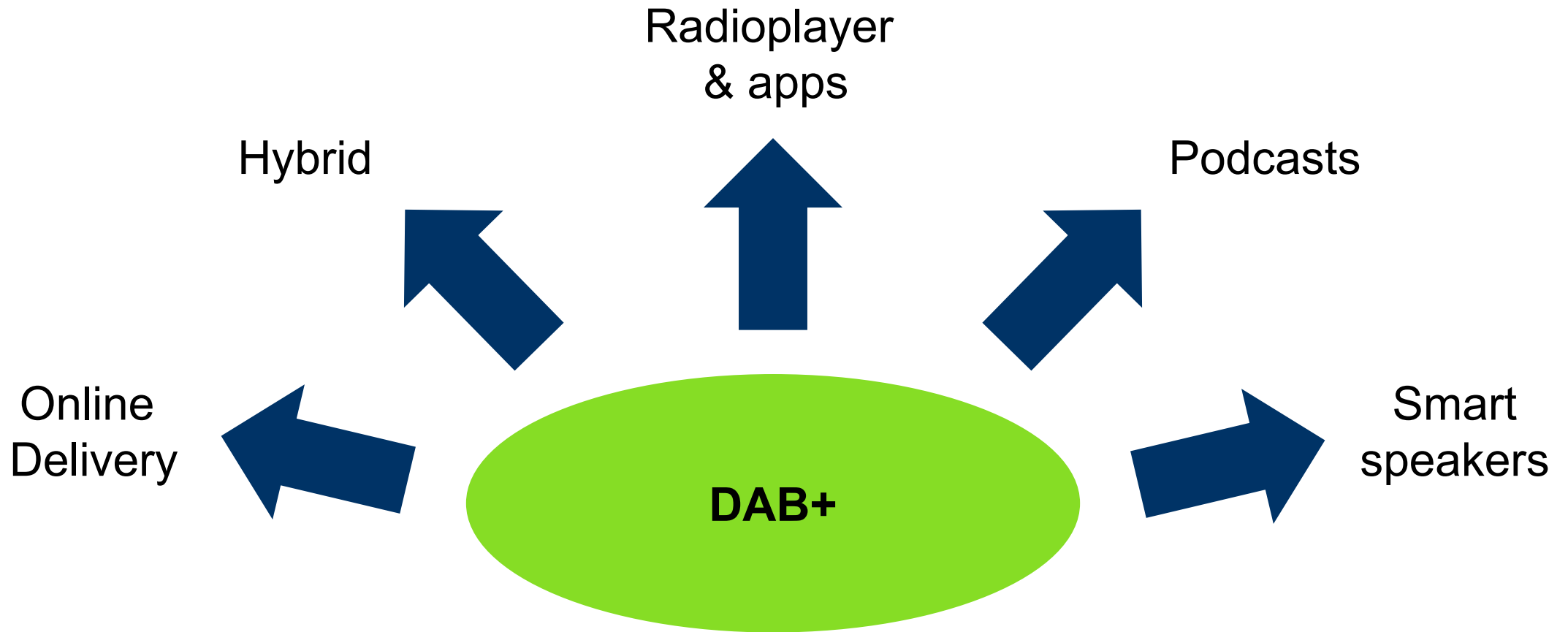
Apple HomePod

The challenge for radio: how to compete in an IP dominated world

UK radio's share of audio, by platform

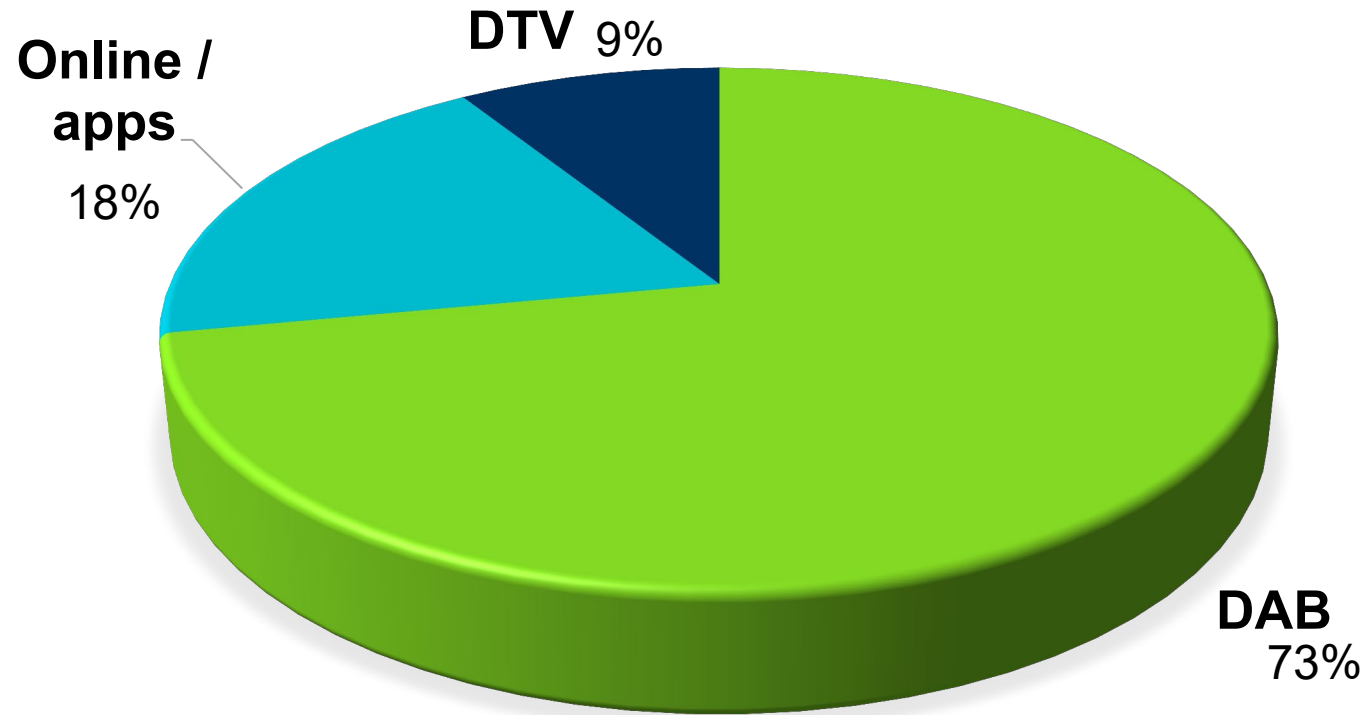


Radio needs a multiplatform strategy – with digital broadcast at its heart



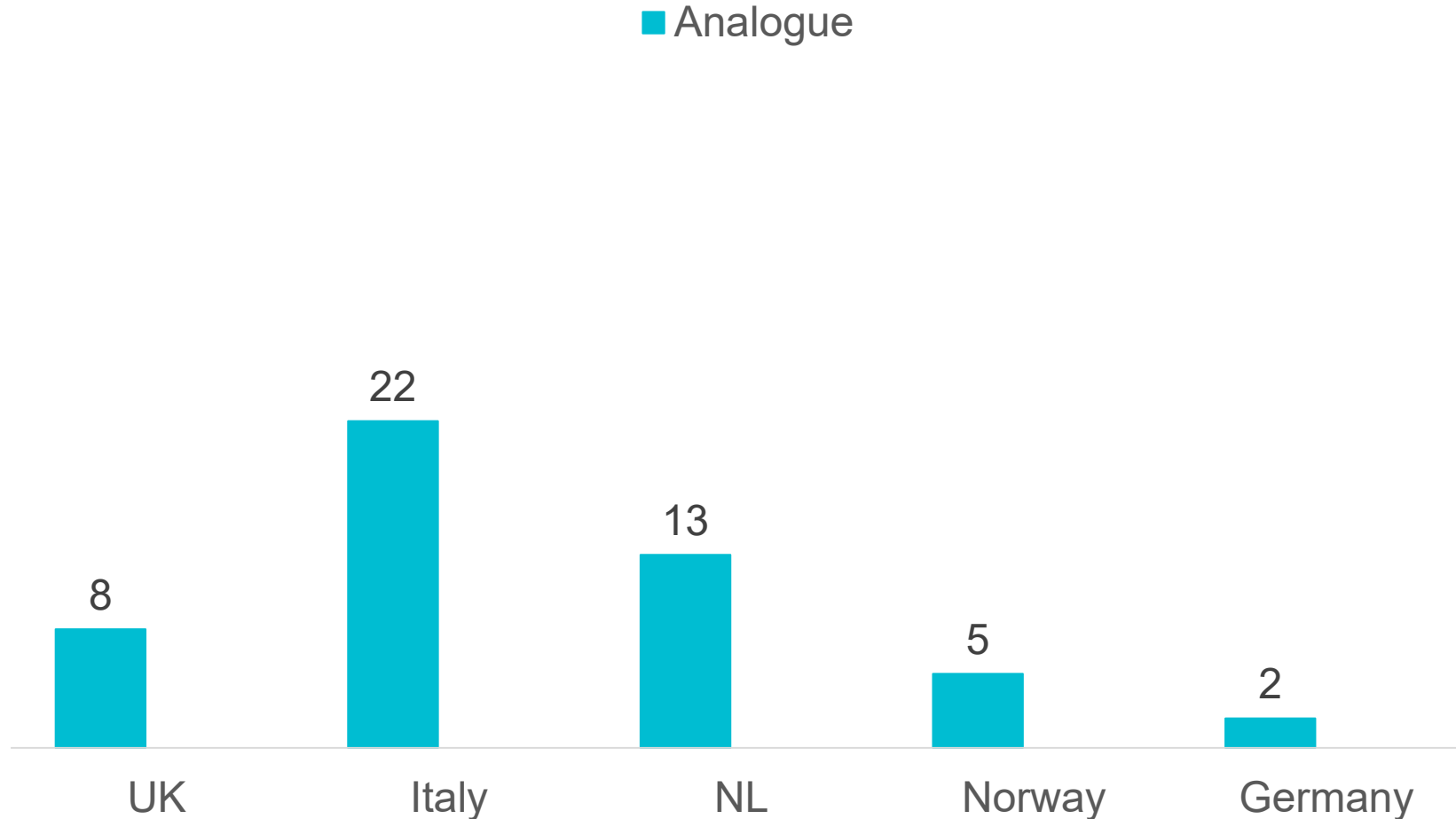
DAB: the key platform for digital listening

UK digital radio listening by platform



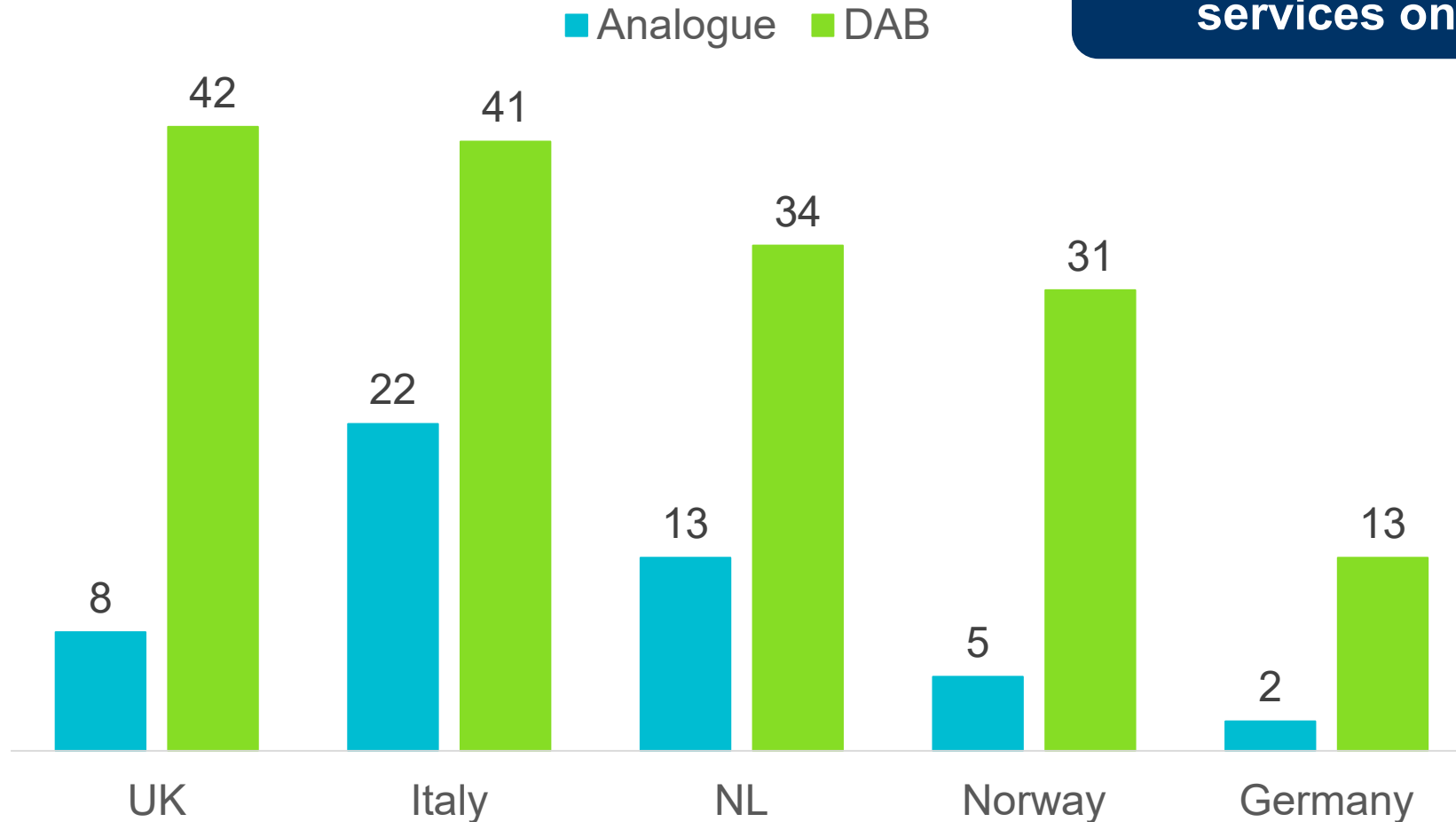
Analogue radio offers limited choice

National radio services



Digital radio: greater choice

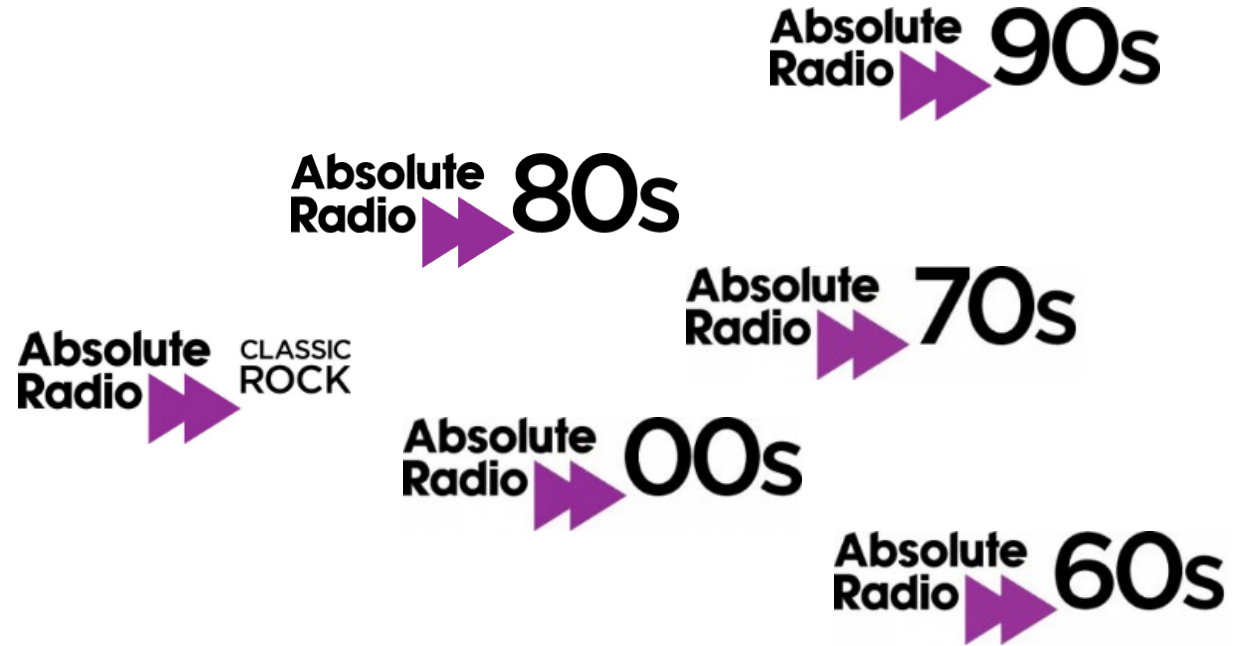
National radio services



Up to six times as many services on DAB+

Brand extensions play key role

Absolute.
▶ absoluteradio.co.uk



Brand extensions play key role – in Australia



Brand extensions play key role – in Norway



Listeners value this choice

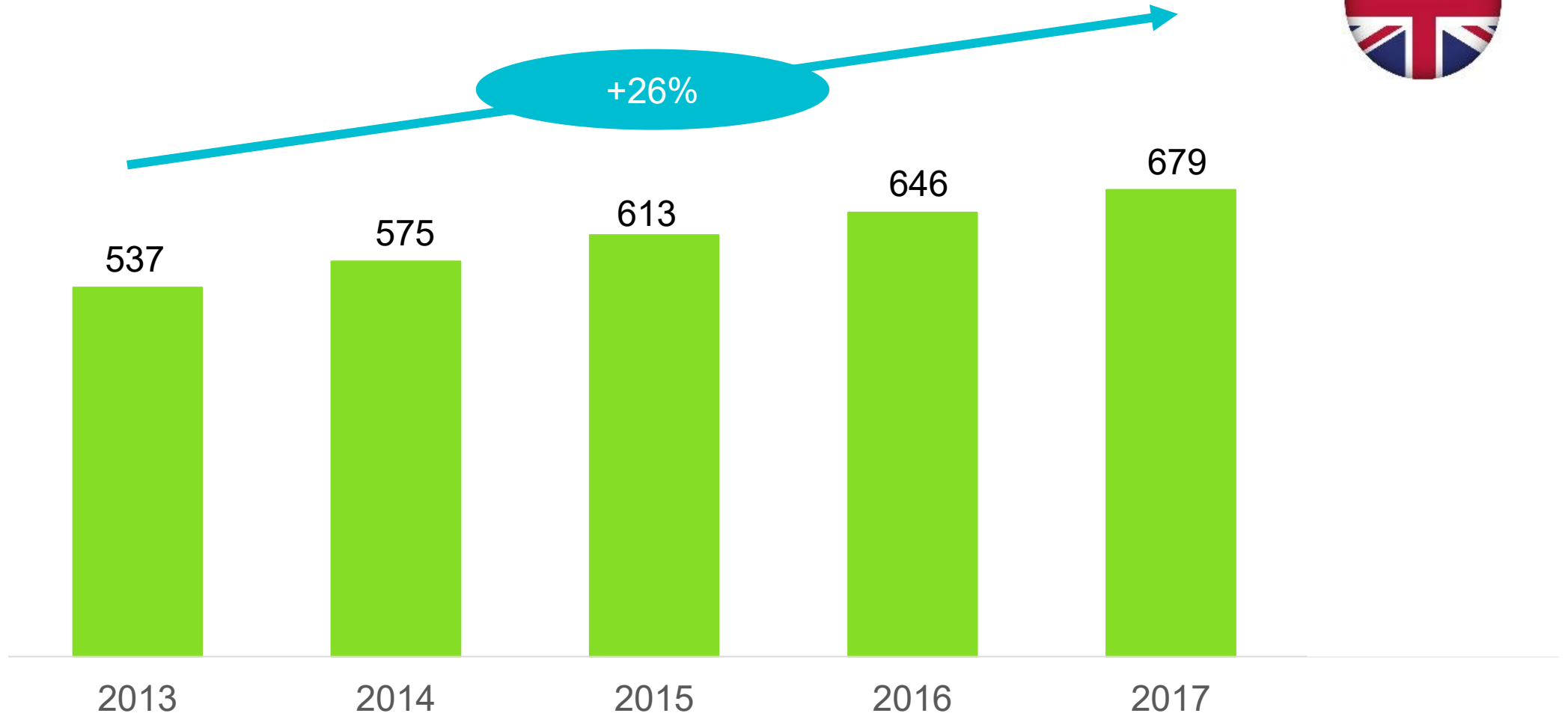


35%

of listening in Norway is to new “digital-only”
stations

National stations are driving commercial revenues

UK radio advertising revenues, £ million

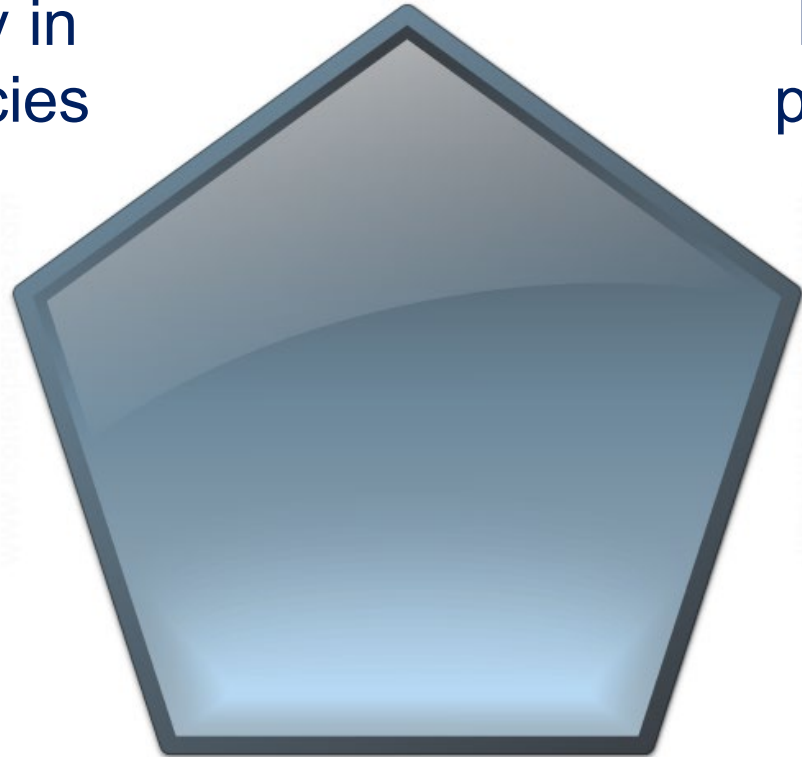


DAB delivers benefits for society

Free to air / no gatekeeper

Reliability in emergencies

Media plurality



Enhanced traffic information

Spectrum efficiency

Lower costs and emissions

Next steps

WorldDAB has three major goals

- 1 Grow established DAB markets
- 2 Strengthen DAB in cars
- 3 Develop new DAB territories

Share best practice across markets

The Five Cs



Optimise in-car digital radio experience

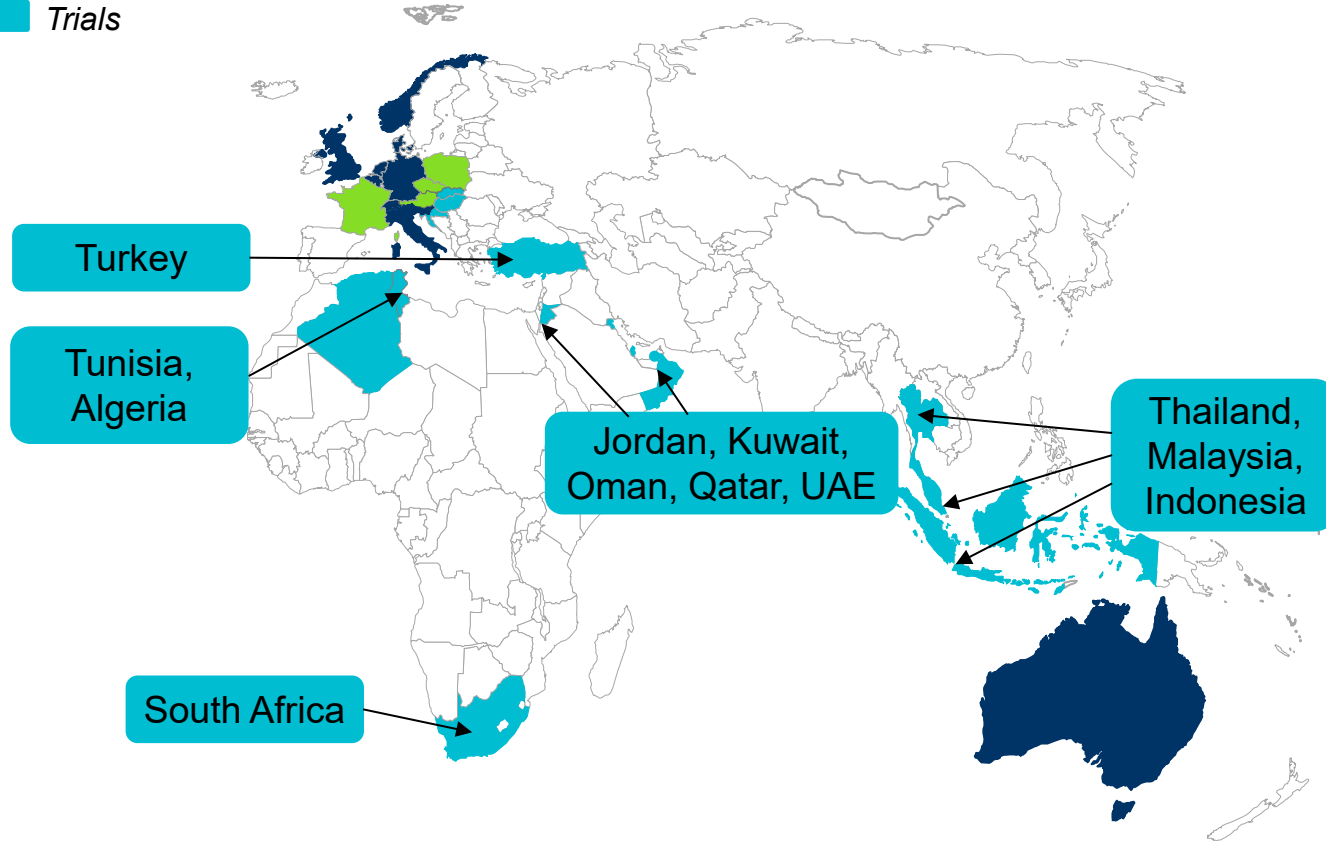


WorldDAB Automotive Working Group

- User interfaces
- Receiver / antenna performance
- Aftermarket devices

Develop new markets – especially in Africa, Middle East and Asia Pacific

- Established
- On the move
- Trials



- Work with national champions
- Provide “consultancy support”
- Aim to convince policy makers and broadcasters

End sale of analogue-only consumer receivers



- In Europe, over 50% of new consumer radio receivers are analogue only
- Italy already has law, France next to follow
- Time for others to follow

Conclusions

- 1 The future of radio is digital and multiplatform
- 2 DAB provides the essential foundation
- 3 Collaboration is the key to success

Thank you