

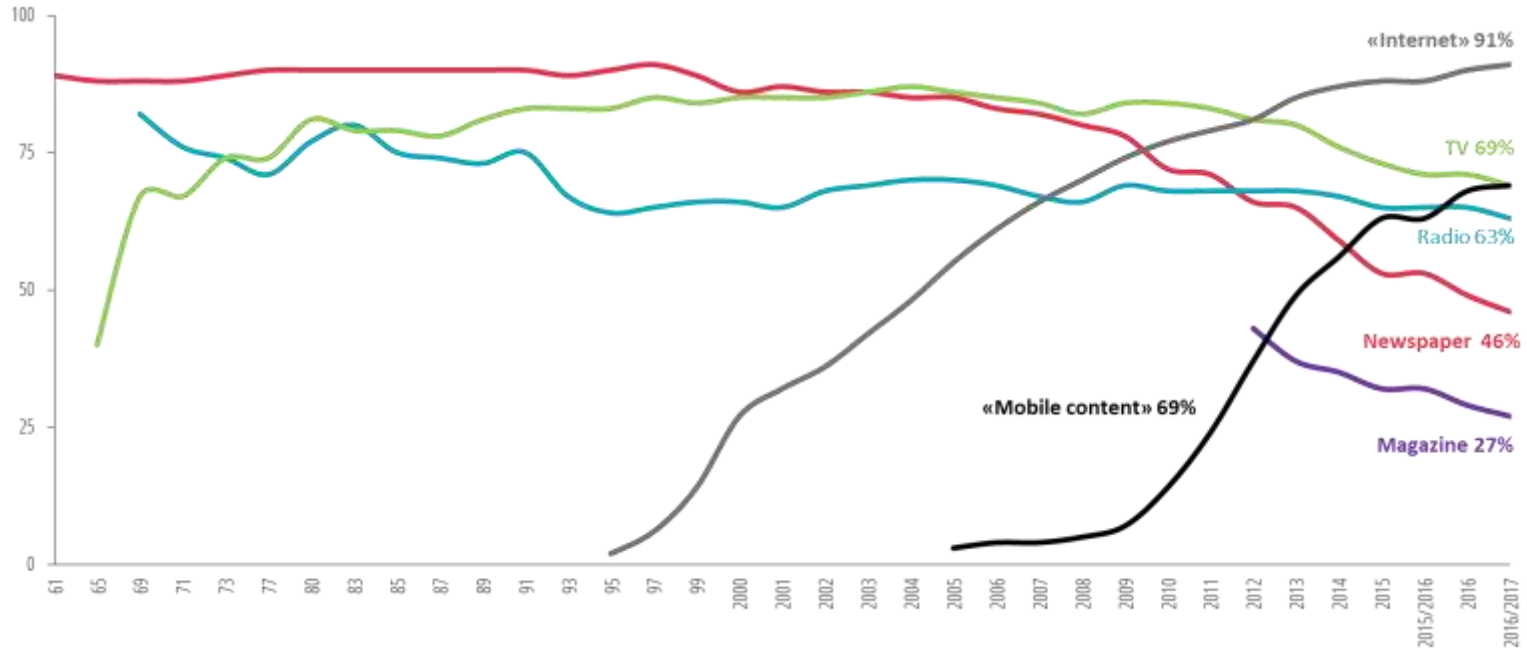
Norway: from FM to DAB+ lessons learned

ABU Digital Broadcasting Symposium 2019
Bernie O'Neill, Project Director, WorldDAB

1. Why
2. How
3. Results
4. Lessons learned

WHY

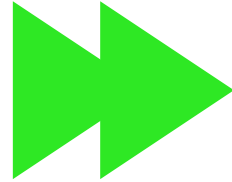
MEDIA TRENDS 1960 – 2016/17



Source: **KANTAR MEDIA**

Daily use newspaper, radio, tv and internet

DIGITISATION OF RADIO



ONLY 5 NATIONAL STATIONS ON FM

- Radio is a national business
- Topography – scattered population
- No room on FM
- DAB+ made it possible to multiply the national offer to reach the whole population



31 STATIONS ON DAB+

- Radio is a national business
- Topography – scattered population
- No room on FM
- DAB+ made it possible to multiply the national offer to reach the whole population



HOW

COLLABORATION KEY

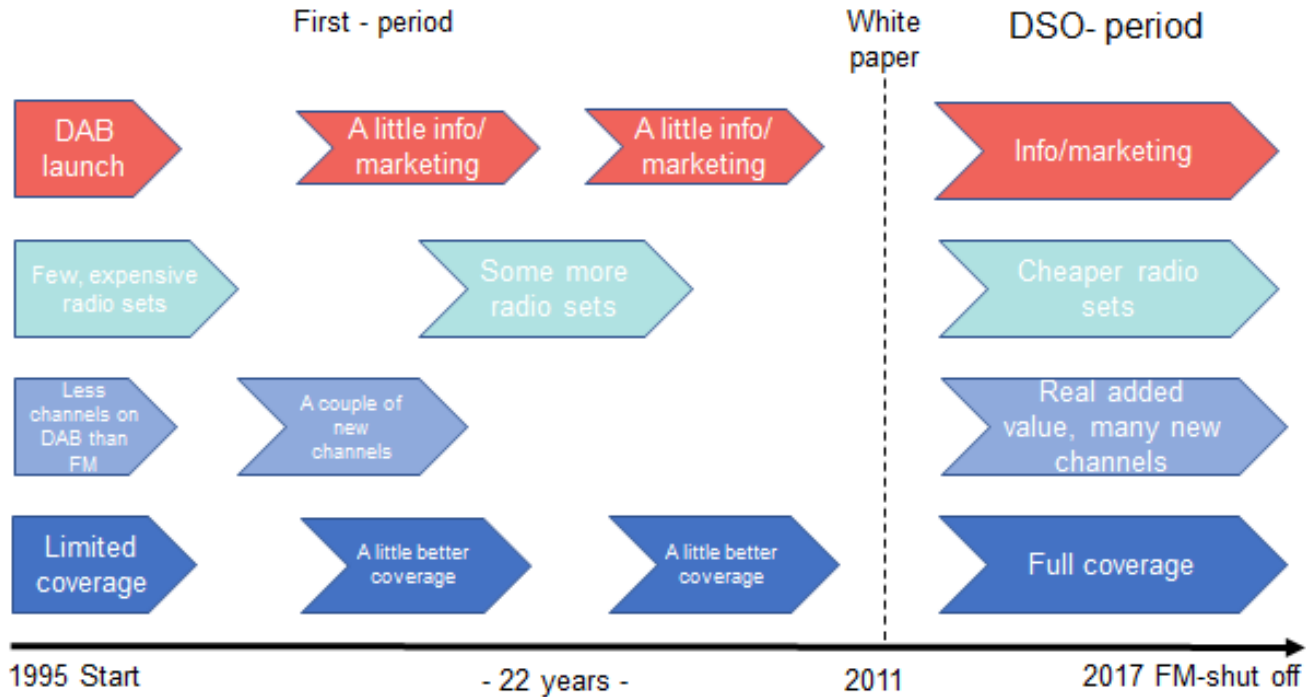
Teamwork was essential –

- Compete on content
- Collaborate on cost



NRK - P4 Group -
Bauer

PROCESS



2011 White Paper

- Industry driven
- Political support

The Ministry's proposals

The proposals of the report build on the following principles:

- Digitization of radio should be industry-driven.
- The authorities should actively stimulate the digitization-process by developing a plan for the migration to digital radio.

https://www.regjeringen.no/globalassets/upload/kud/medier/rapporter/v-0951e-summaryreportno8_2010-11.pdf

FM switch off criteria

1. Public radio: 99,5 % coverage
2. Commercial radio: 90 % coverage
3. Added value of digital radio
4. At least half of radio listeners must listen to a digital radio-platform on a daily basis
5. Technically satisfactory and reasonable solutions for radio reception



https://www.regjeringen.no/globalassets/upload/kud/medier/rapporter/v-0951e-summaryreportno8_2010-11.pdf

RESULTS

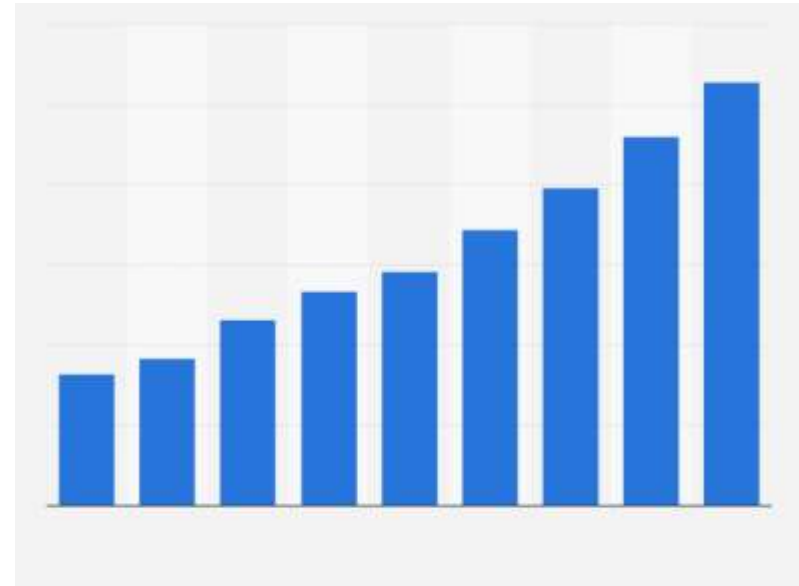
REVENUES- STABLE THROUGHOUT DSO



LISTENERS FOLLOWED ONTO DAB+

Official stats (Feb 2019) -

- Listening figures are back to pre-DSO levels and continue to rise
- Listeners are listening for longer
- How listening is measured has had to evolve



A NEW DYNAMIC RADIO MARKET



LESSONS LEARNED

DAB+ as the backbone secures free to air radio for everyone

- Every market is unique and digital radio consists of many platforms
- Collaborate on cost, compete on content
- People love more content - listeners prefer more choice
- Radio must offer more to everyone in competition with more rivals
- No digitisation without a switch off plan - speeds up the conversion
- Regional switch off works
- Public Service Broadcaster with robust license income to switch off first
- There is a big need for information - DAB is a little different
- DAB in cars - especially demanding
- Listeners are loyal, but need time to upgrade all radios
- A national rollout body representing one voice was necessary and successful

NEW IMPACT REPORT DUE END MARCH 2019

A Norway DSO impact report is currently in preparation, ready by end March 2019 covering -

- Detailed analysis on listener behaviour
- Impact on advertising and revenue
- What DSO has meant for radio stations
- How the structure of the radio industry is evolving
- How radio content has changed and evolved
- New stations, new formats

Thank you

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