

WORLD



Defining the future of digital radio

President's address

Patrick Hannon

6th November, 2013

WORLD



Digital Multimedia Broadcasting
Radio • Mobile TV • Multimedia • Traffic Data

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1. Introduction

2. Position today

3. The way ahead

WorldDMB – the vision



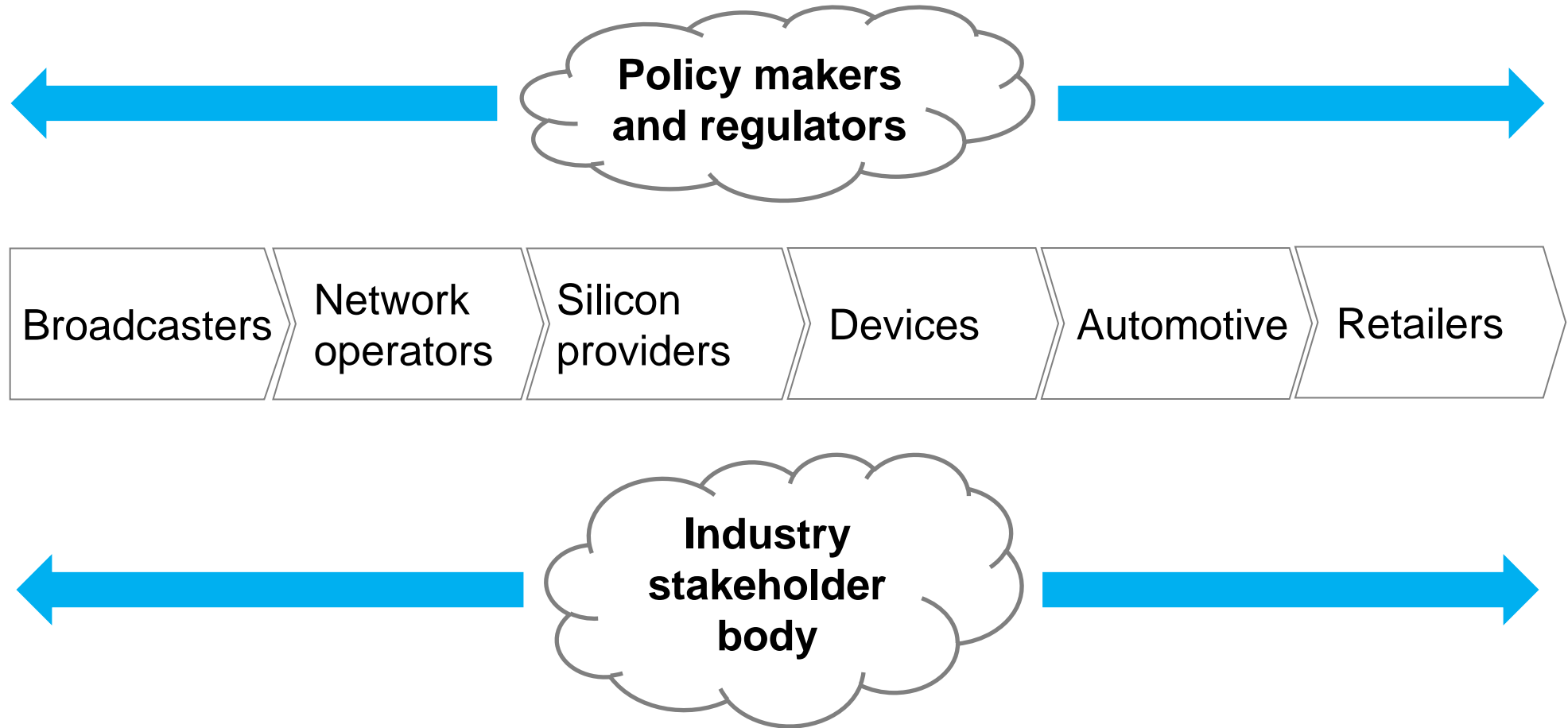
- Every consumer to enjoy digital radio
 - based on Eureka 147
 - at home, at work, on the move
 - on devices which fit their needs

WorldDMB – what we do

Mission

1. Define and maintain digital radio standards
2. Influence policymakers and regulators
3. Promote DAB / DAB+ to stakeholders in key markets

We work with players across the value chain



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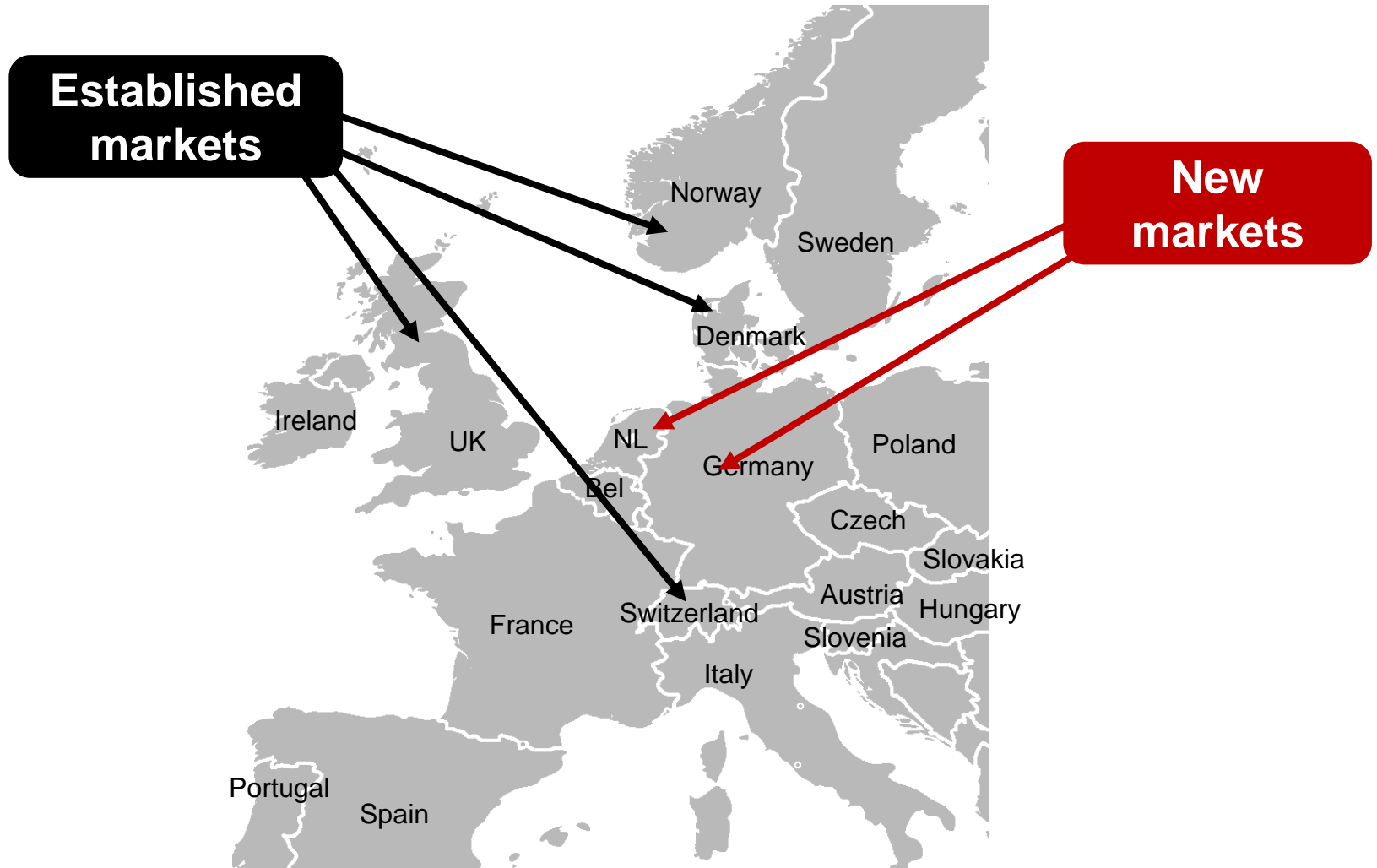
A digital radio wave is moving across Europe



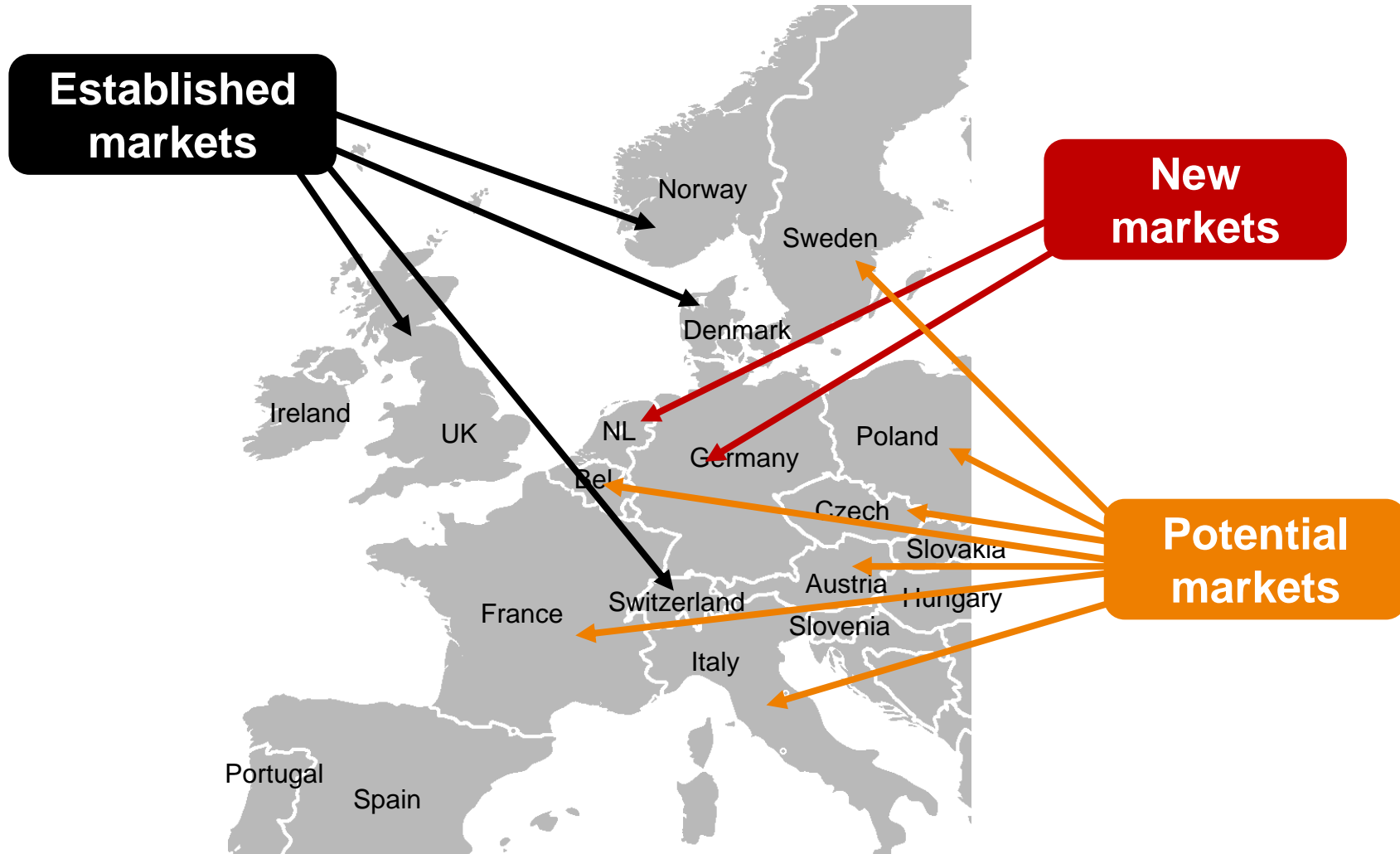
Four core markets: UK, Norway, Denmark and Switzerland



Followed by Germany (2011) and Netherlands (2013)



Several potential markets



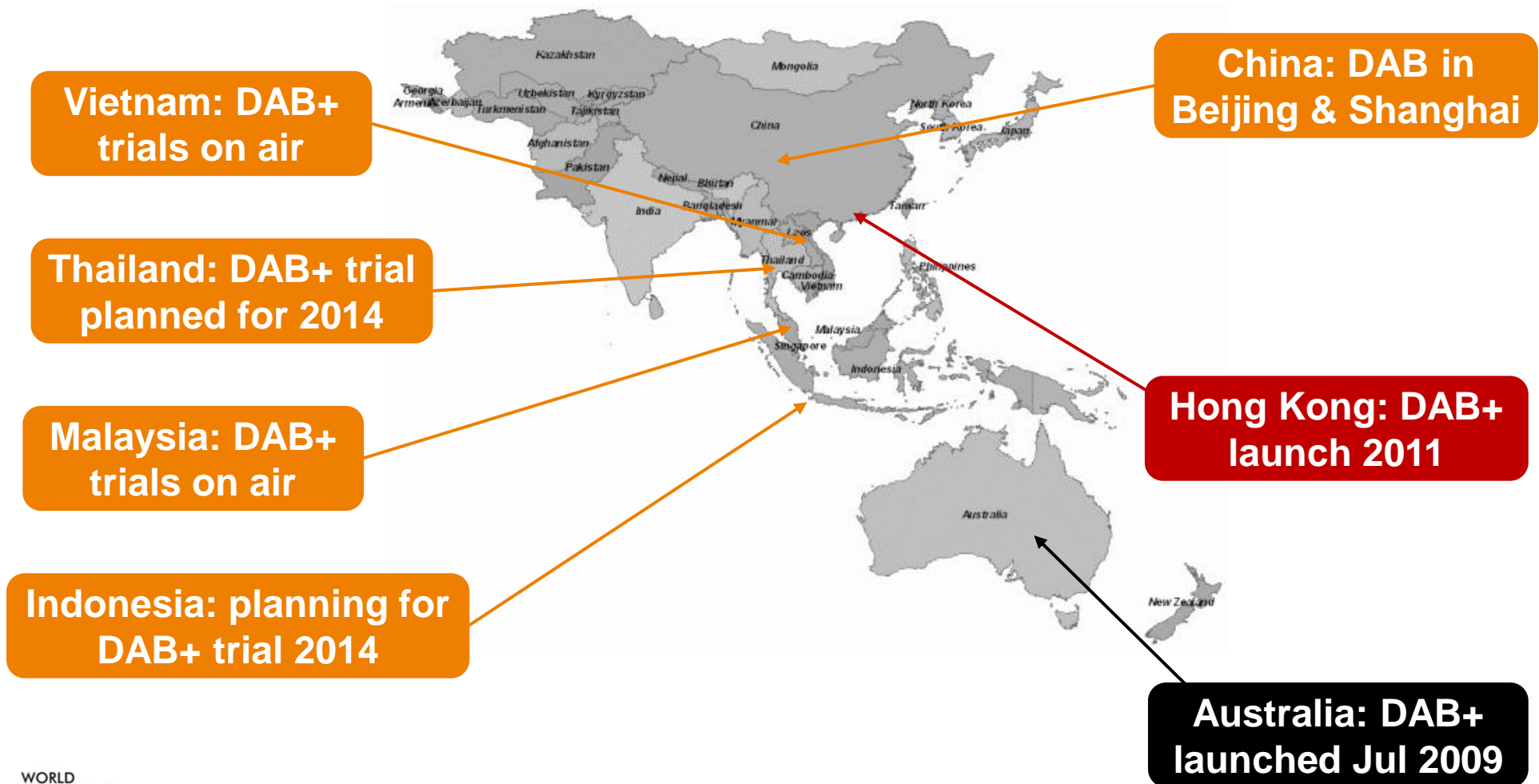
In Asia Pacific, a similar process is under way



Hong Kong: DAB+ launch 2011

Australia: DAB+ launched Jul 2009

In Asia Pacific, a similar process is under way



Norway – switchover in 2017



- DAB coverage: 84%+ of 5m population
- 25% of households have digital radio
- FM switch-off in 2017
 - if targets achieved, or 2019

Denmark – switchover in 2019



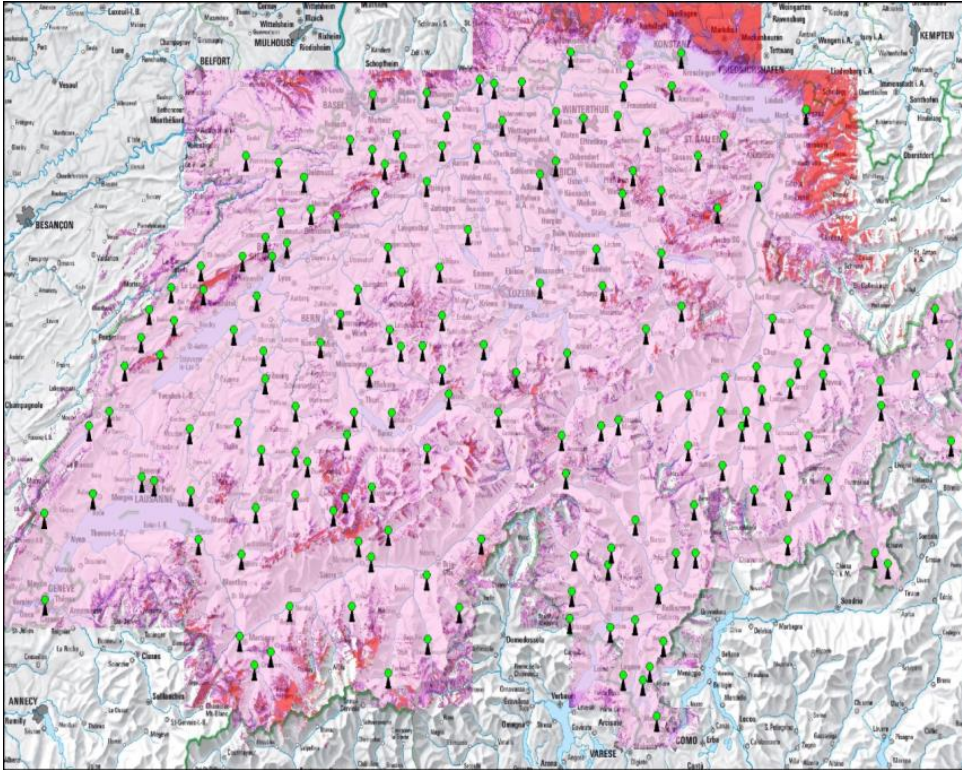
- 34% have digital radio
- Switching from DAB to DAB+
- FM switch-off in 2019
 - if 50% of listening is digital in 2018

United Kingdom – decides on switchover December 2013



- 46% of households have DAB
 - 80% of new portable radios are digital
 - 40% of new cars have DAB
- Decision re DSO Q4 13

Switzerland – 99% outdoor coverage – now planning for DSO



- Coverage 99% outdoor (2013)
- Services for French, German and Italian
- Switched from DAB to DAB+
- Over 1.1m receivers sold (270k in 2012)

Germany – two years of increasing momentum



- Launched DAB+ August 2011
- Coverage over 80%
- Penetration 5%
- Sales in 2013 (Jan-Sep) – up 66% on year on year

Netherlands – launched DAB+ Sept 2013



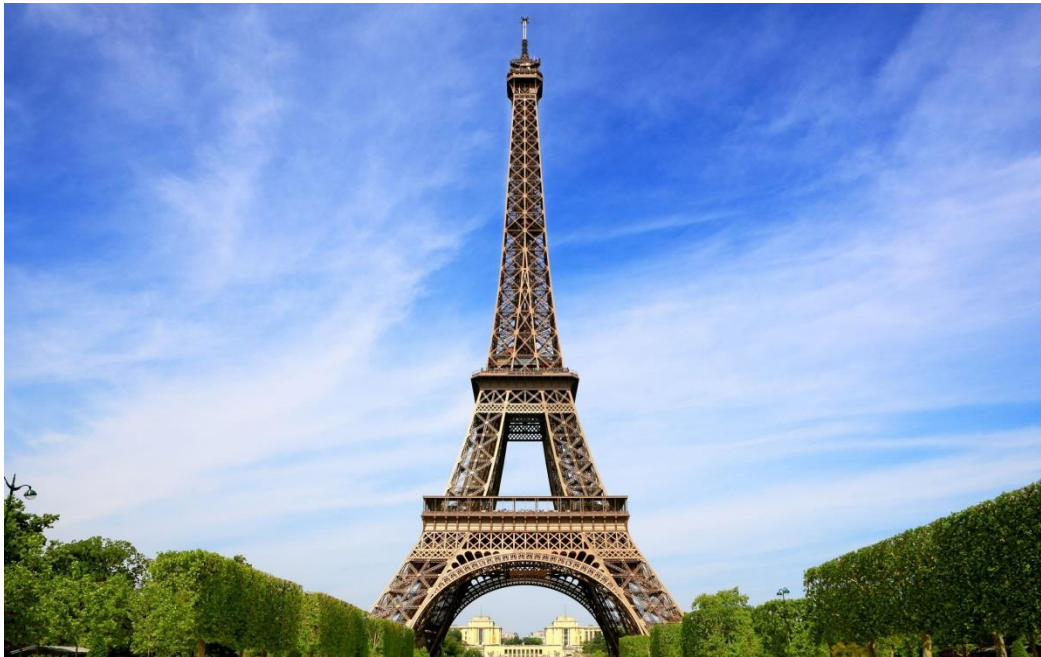
- 26 services
 - 17 commercial (8 digital-only)
 - 9 from NPO (4 digital-only)
- Coverage
 - commercial services - national
 - NPO services 70% - national from Jan 2014.

Italy – coverage in place, awaiting regulatory approval



- 60% of radio listening in-car
- Two trial national multiplexes
- DAB+ services licensed in Trentino (Q4 2012)
- RAI committed to roll out DAB+ over next three years

France – licences for three cities, seeking approval to launch



- Licences awarded for Paris, Nice and Marseille
- DAB+ approved Sept 2013
- On-air Q1 2014?

Poland – first steps



- Polski Radio starts DAB+
 - Warsaw
 - Katowice
- Q4 2013

Sweden – decision on DAB+ next year



- Government and broadcaster support for DAB+ (June 2013)
- Special advisor appointed
- Parliamentary decision end 2014

Australia – leaping ahead



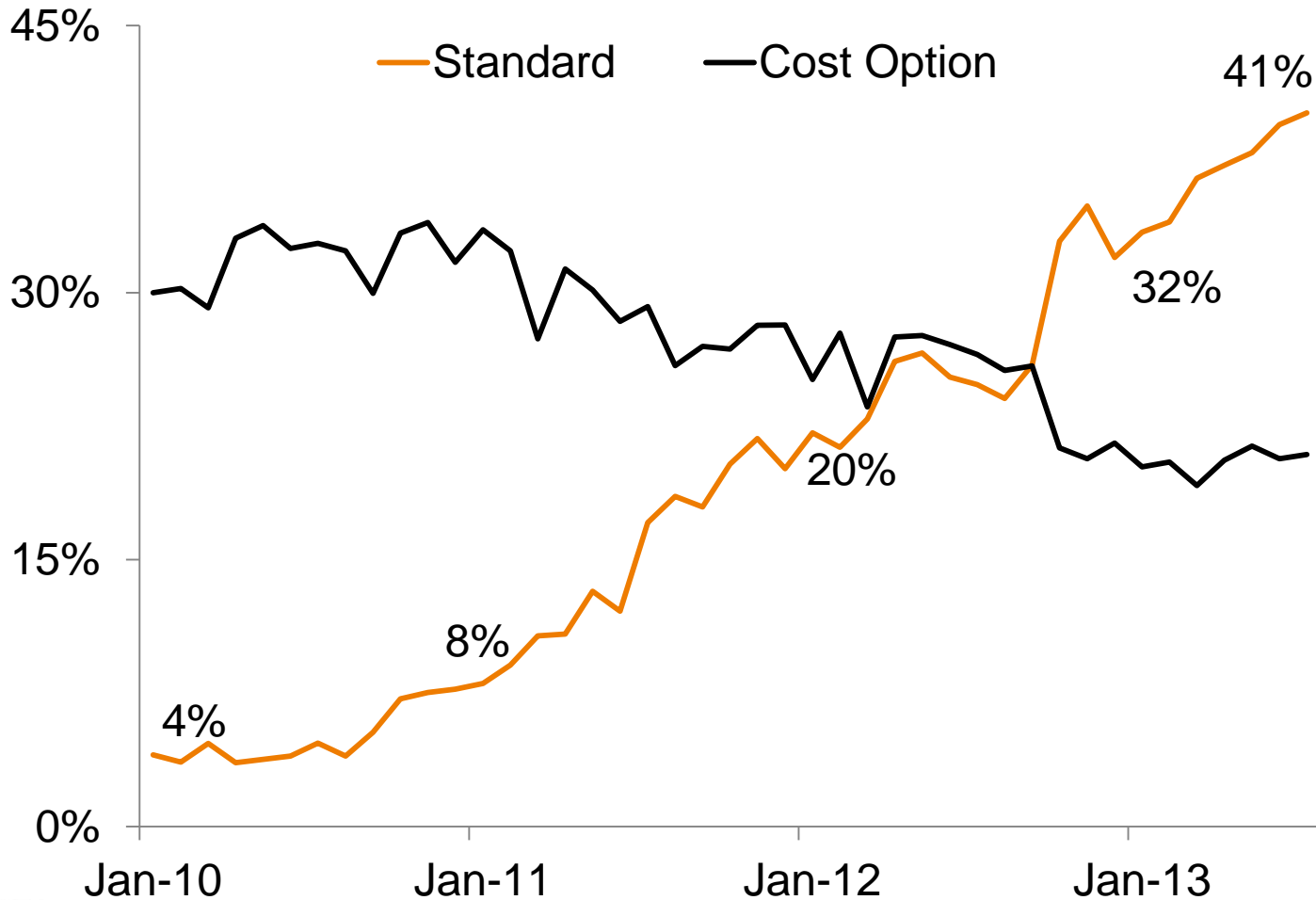
- DAB+ launched 2009
 - five major cities
- 1.3m devices sold (400k p.a.)
 - 15% household penetration
- DAB+ standard in several car models¹

Automotive brands offering line-fit DAB



In UK, 40% of new cars have DAB as standard

DAB in new cars



- On track for 100% by end 2015

Converting existing cars to digital radio



Solutions available for all major manufactures

Table-top and kitchen receivers – DAB already mainstream



Entry level models from €21

Radios with colour screens for under £100

Revo Pixis



Radios with Bluetooth connectivity – from €59



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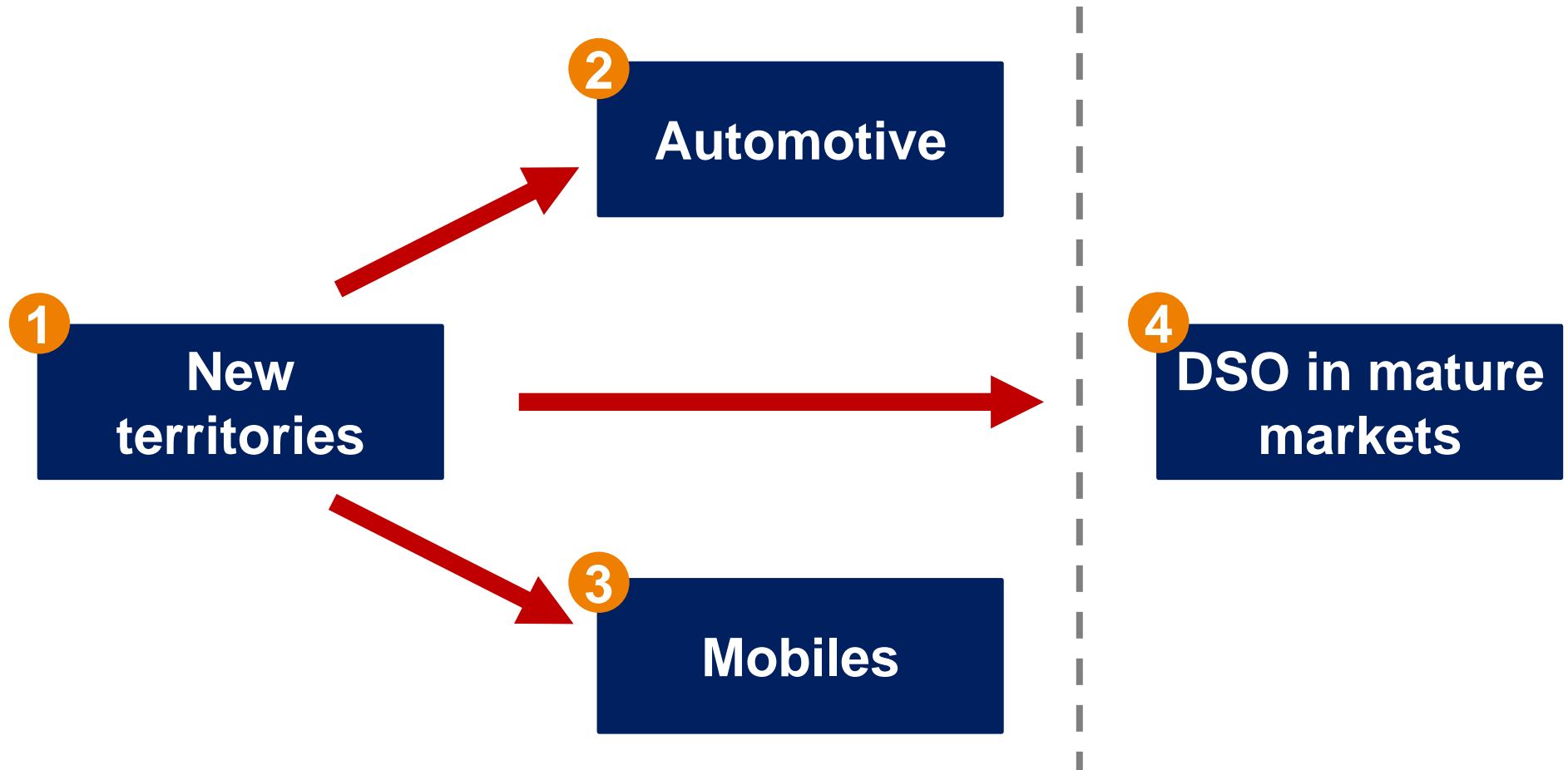
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Strategy based on four key objectives



1 Successful international expansion



Priorities

- **Europe**
 - Italy, France, Sweden, Belgium, Poland...
- **Asia Pacific**
 - S Korea, Vietnam, Thailand, Indonesia...
- **Africa & Middle East**
 - South Africa, Arab States...

1 International – what we will do



Key territories

A

Support national champions

- Promoters of DAB

B

WDMB activity

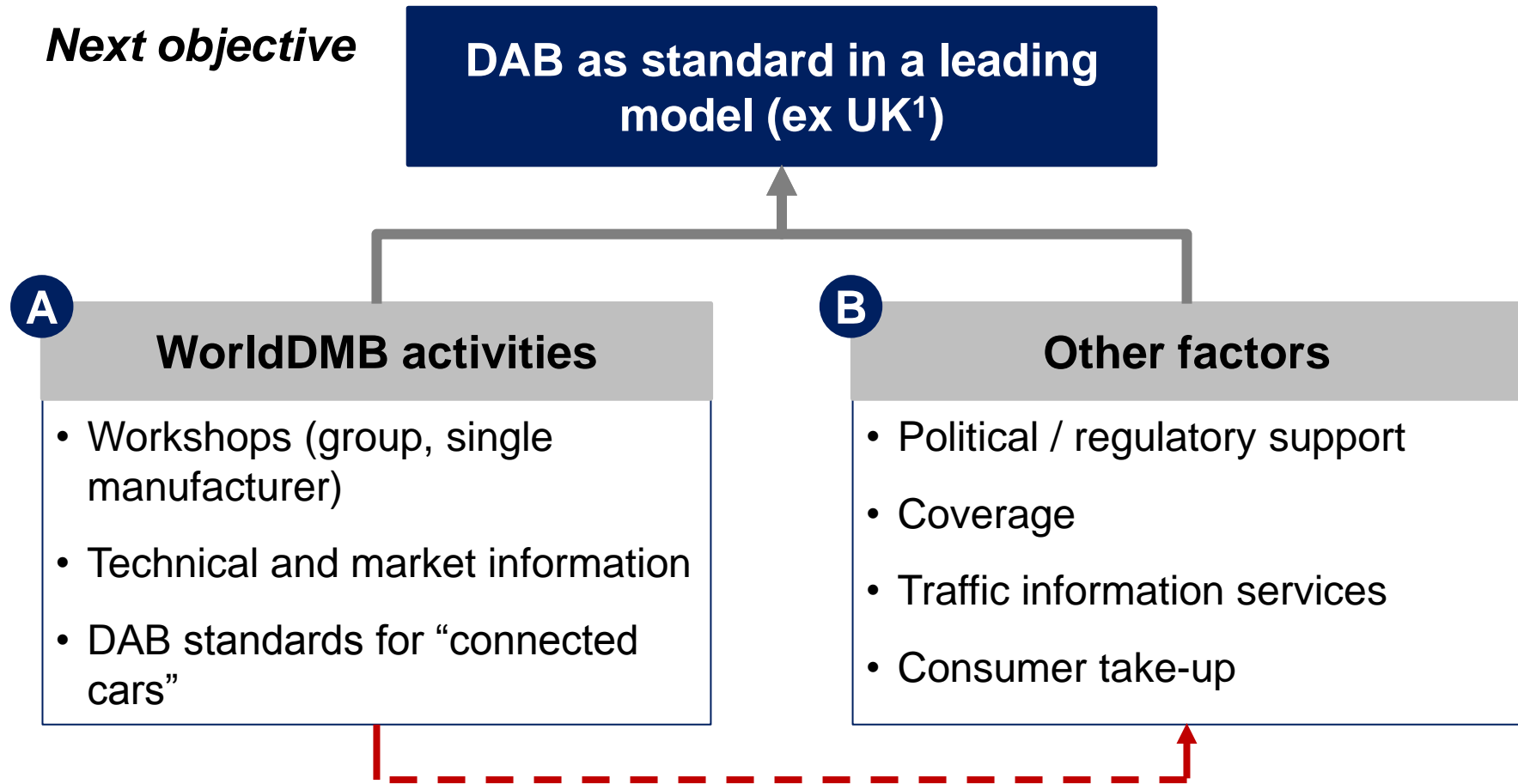
- Marketing (pre-launch and post-launch)
- Technology, e.g.
 - local DAB
 - emergency warning

C

Cross-border alliances

- Information sharing
- Inter-governmental collaboration

2 Automotive target - line-fit DAB as standard



3 Mobiles target: mass deployment of DAB

Objective

All new radios and mobiles to have digital and FM



A

WDMB Technical

- Ensure robust technical standards
 - consistent user interface
 - hybrid (DAB and IP)

B

WDMB Support

- Support members and partners
 - workshops / networking events
 - share lessons from experiences in different markets
 - help co-ordinate initiatives

4 We will support countries looking at digital switchover

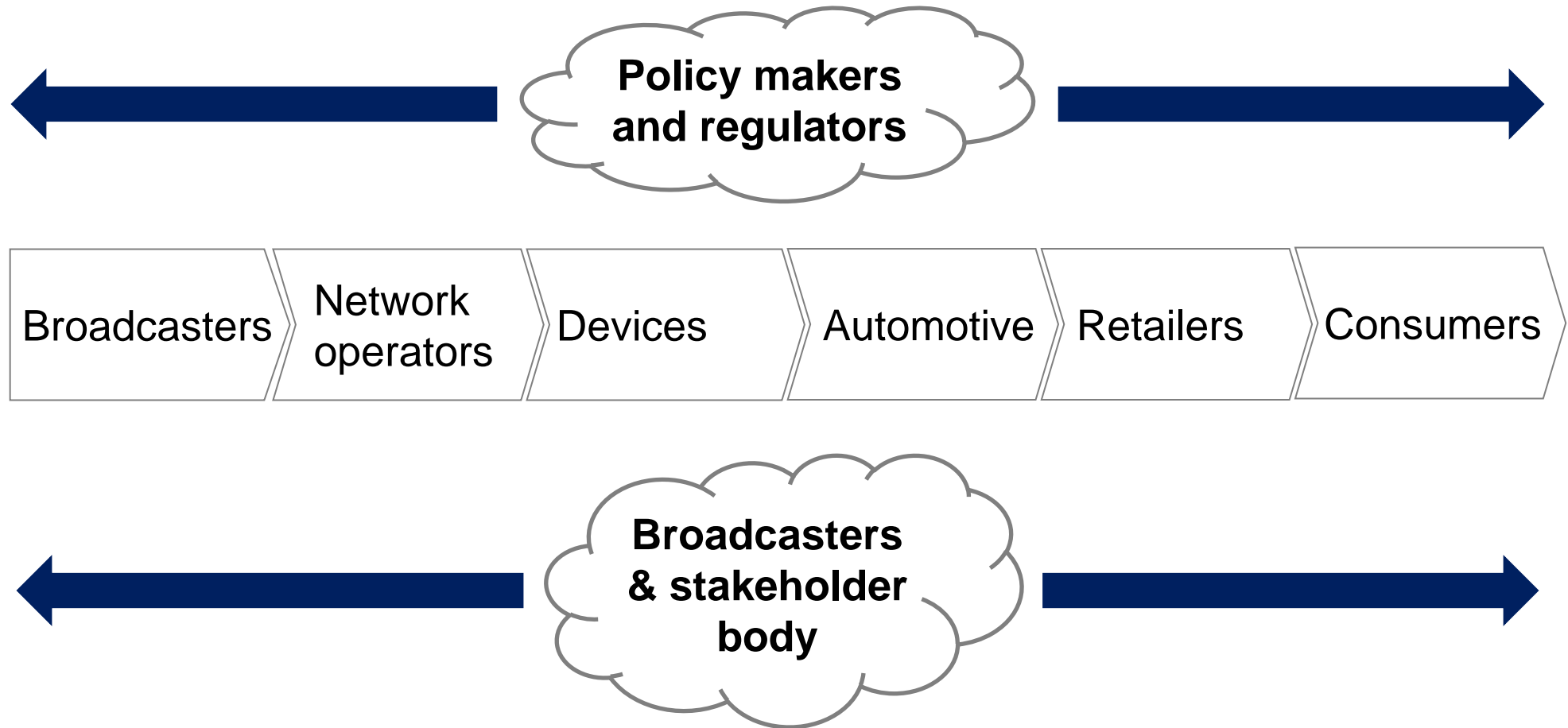
DSO Group

- Representatives from Norway, Denmark, Switzerland, UK, Sweden, Netherlands and Germany
- Others welcome to participate

What we will do

- A** Share best practice
 - switchover criteria
 - coverage / funding
 - market preparation
 - automotive
- B** Within Europe, develop network to build case for EU harmonisation

Collaboration – the key to success



And finally, we are a membership organisation

1. We only succeed if we help members achieve their organisational goals
2. We will only succeed if we achieve collaboration between industry sectors and across national borders
3. We will only succeed if you give us the support we need

Thank you

For further information, please contact:

www.worlddab.org