

DAB: international status

Patrick Hannon, President WorldDMB

Istanbul: 14th June, 2014

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2. International developments

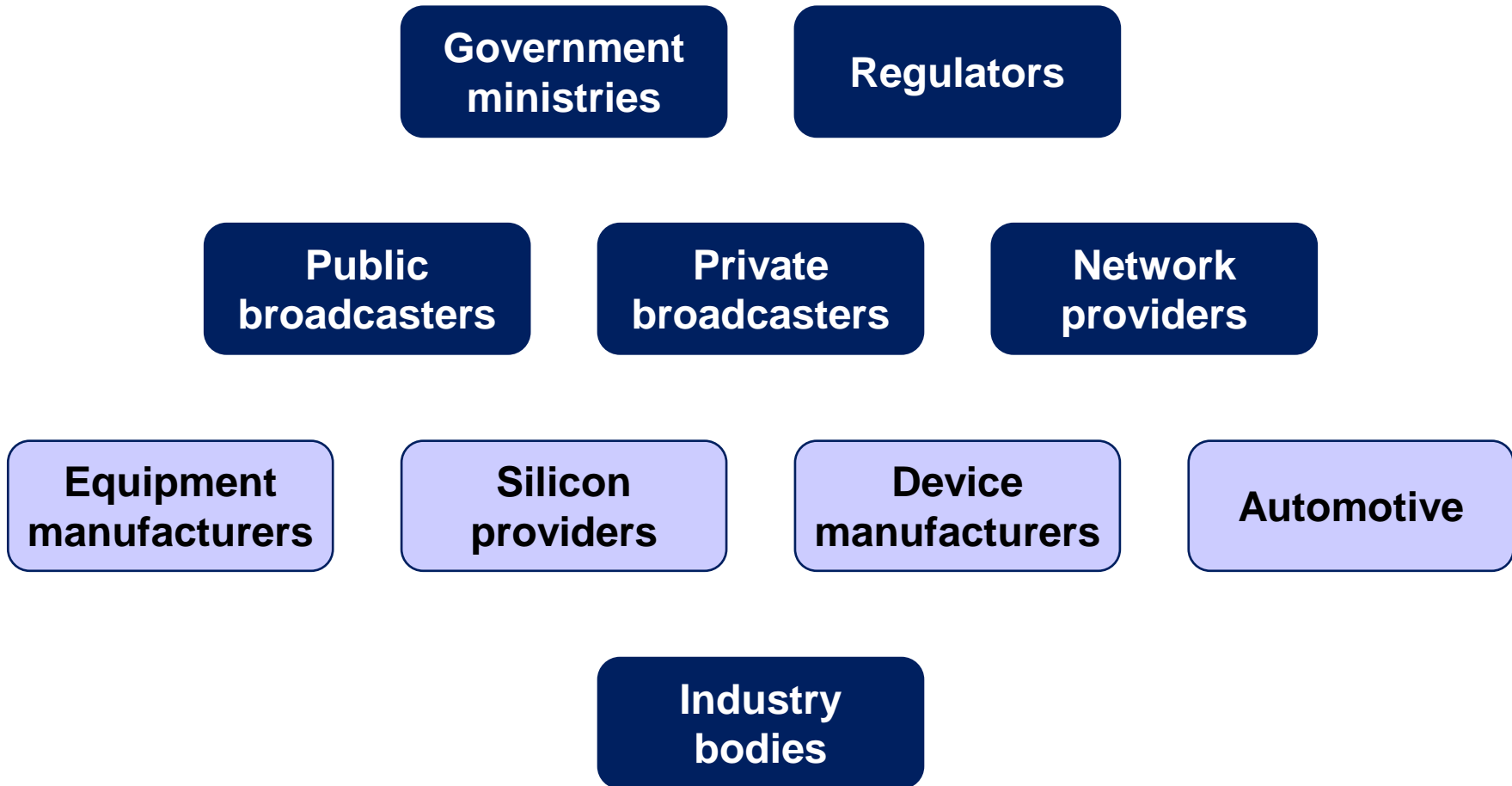
3. Why digital radio? Why now?

WorldDMB – who we are

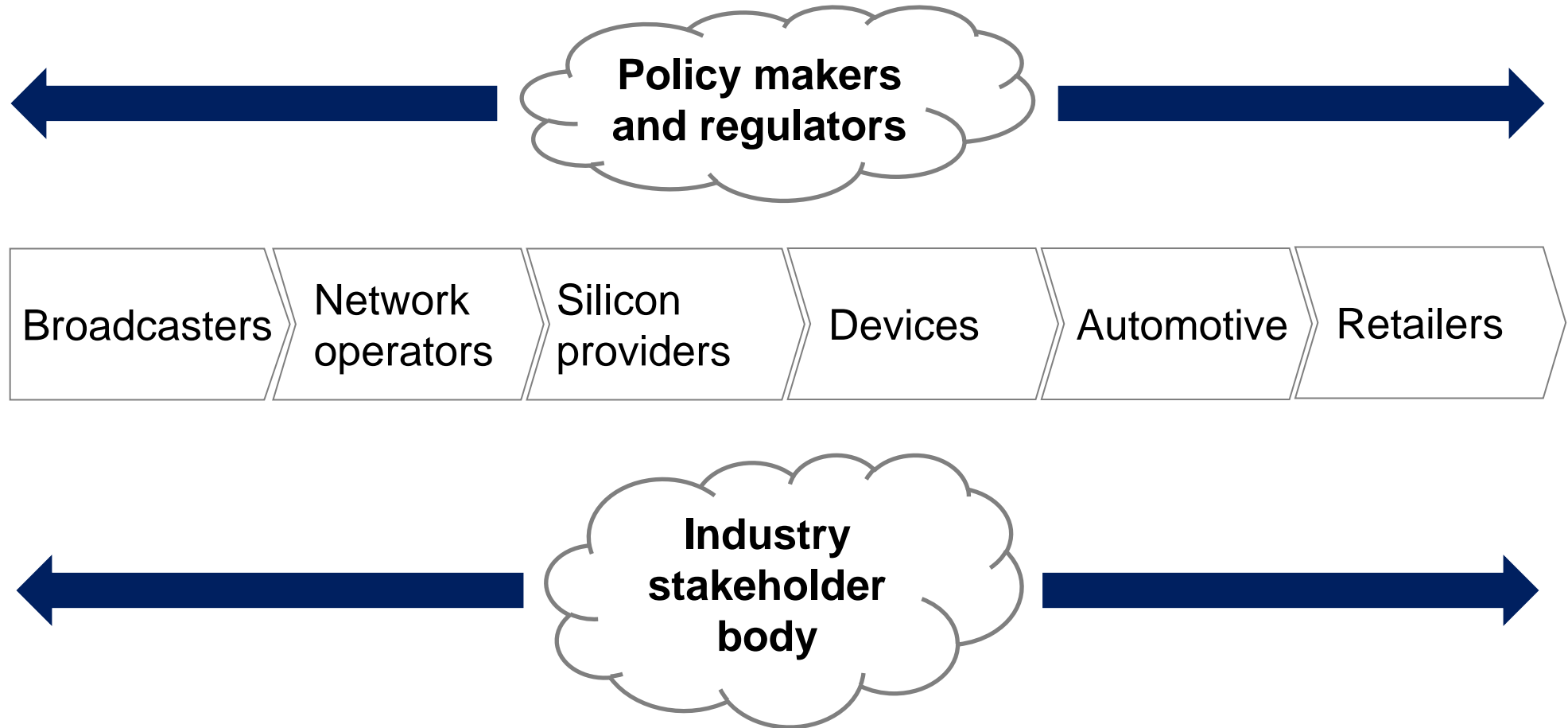


- Promote digital radio (DAB / DAB+) around the world
- Developed DAB technical standards
- Not-for-profit membership organisation

Over 80 members from 22 countries – across radio ecosystem



Our role: to ensure collaboration



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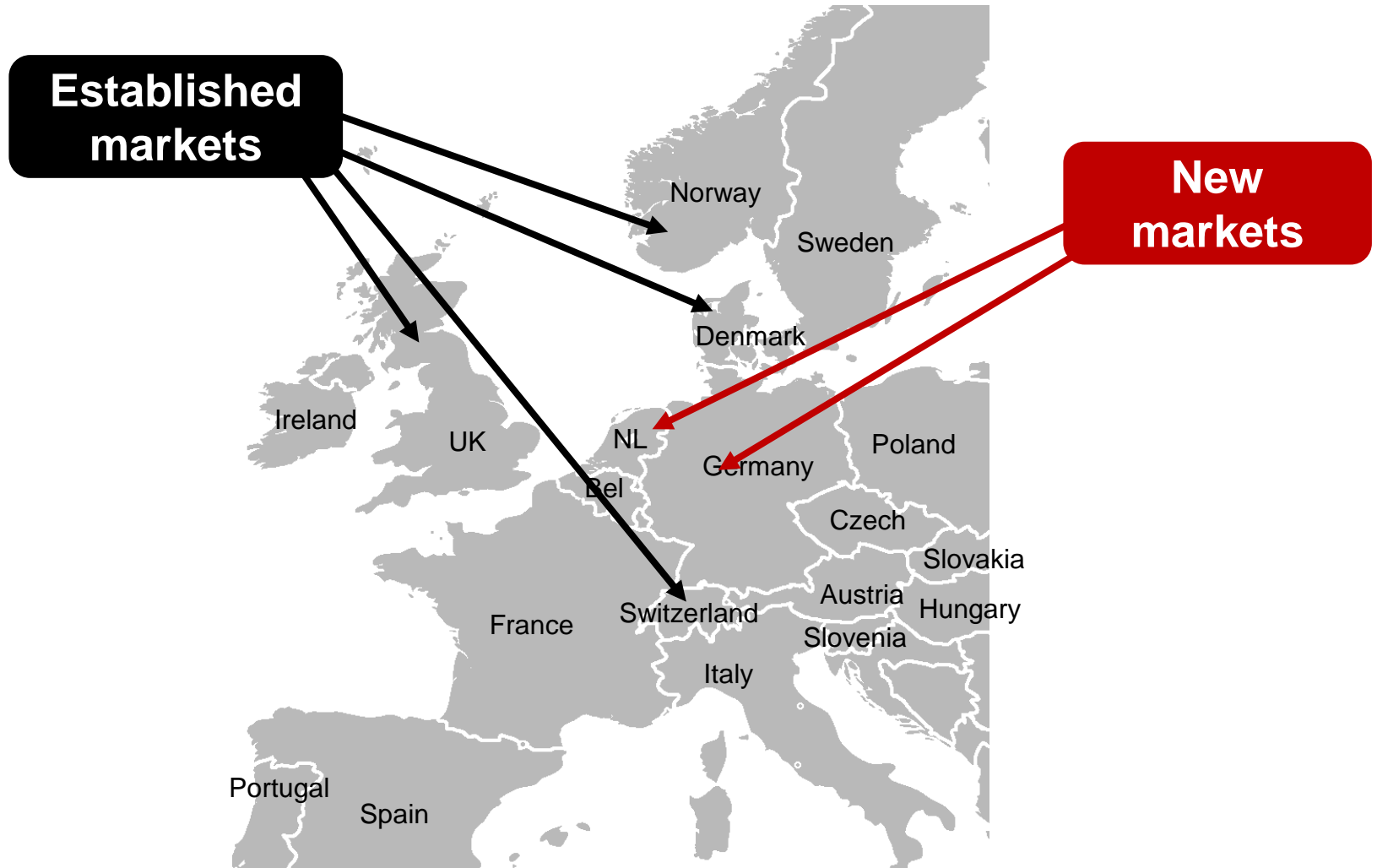
A digital radio wave is moving across Europe



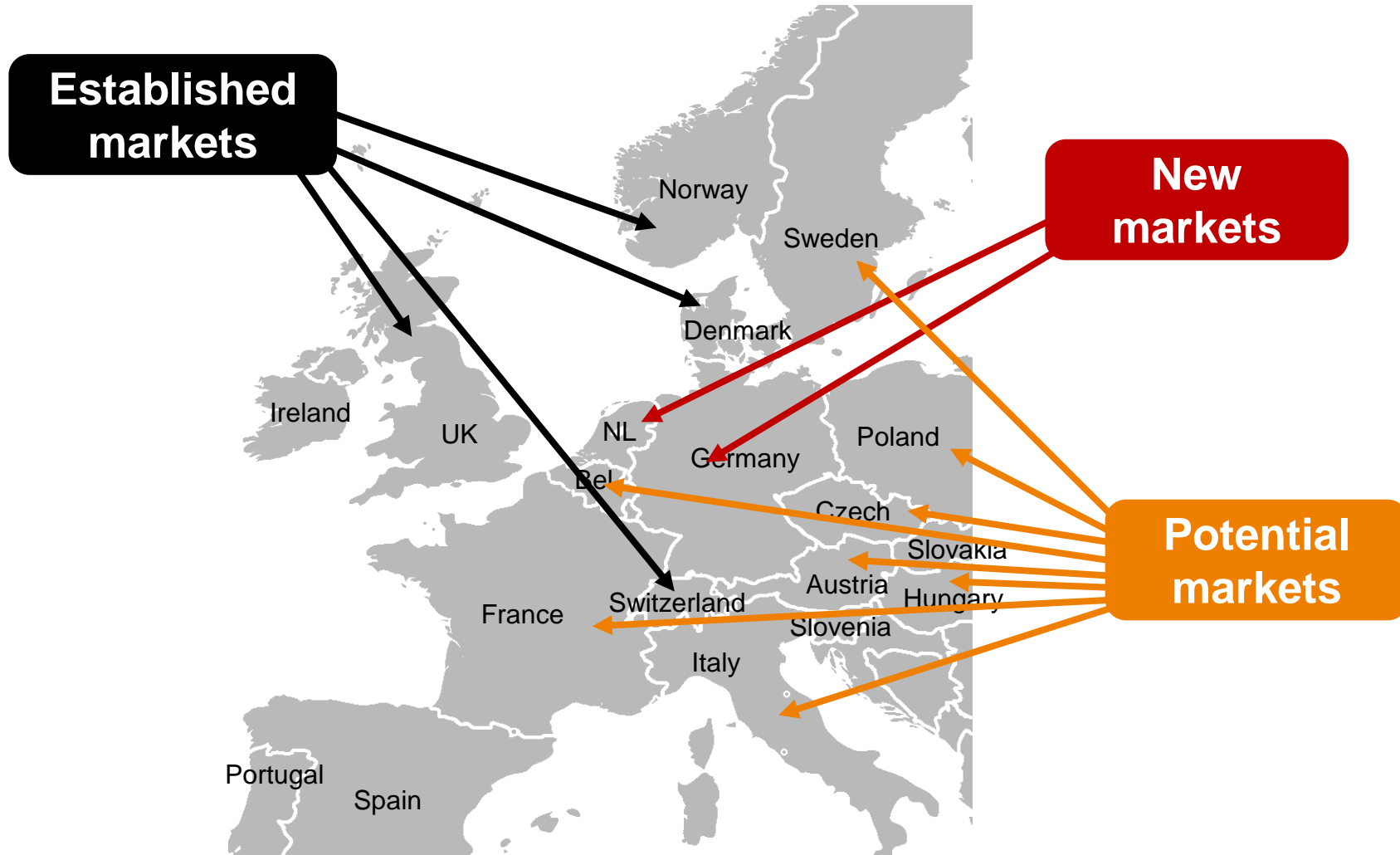
Four core markets: UK, Norway, Denmark and Switzerland



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 – first to have digital switchover - in 2017



- 45% of daily listeners use a digital device
- DAB coverage
 - 98.8% (public multiplex)
- DSO in 2017 if criteria achieved (2019 latest)

United Kingdom – “future of radio is digital”



- 48% of households have DAB¹
- 94% national coverage and all major roads
- By 2015
 - 2nd national commercial mux
 - 360 more transmitters

Denmark – DSO target 2019



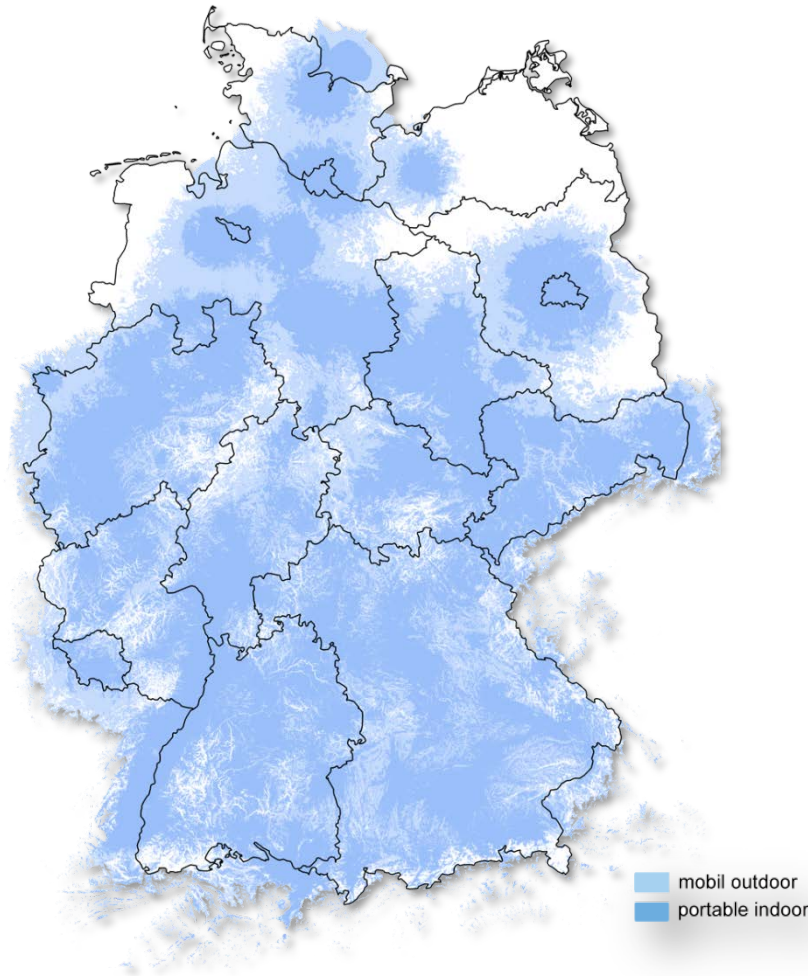
- 37% have digital radio
- Switching from DAB to DAB+
- Launching 3rd national mux (13 regions)
- Conditional DSO target 2019

Switzerland – planning for digital migration



- 33% of households have DAB
- 99% coverage¹
 - all major tunnels by 2016
 - trials for small-scale local DAB
- Report being drafted about digital migration plans
 - DSO expected to start ~2020

Germany – growing momentum



- Launched DAB+ August 2011
 - coverage 91%
 - national and regional services
 - 2013 receiver sales: up 52% year on year
- ARD preparing report on future of broadcast radio

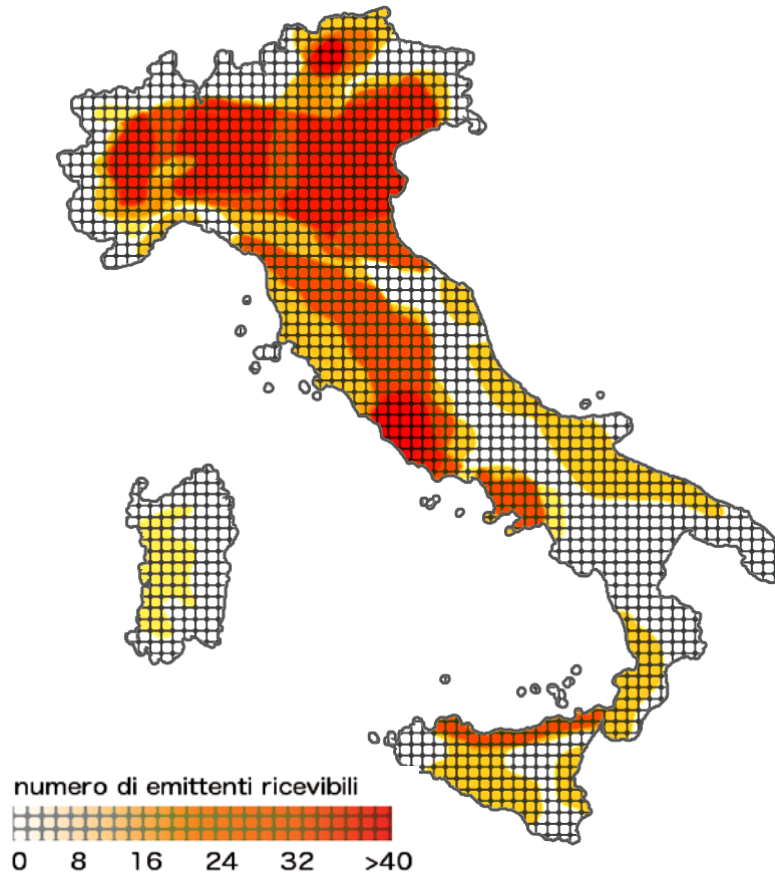
Netherlands – launched DAB+ Sept 2013



- 26 services
 - 17 commercial (8 digital-only)
 - 9 from NPO (4 digital-only)
- Coverage: 95%
- Joint marketing activity
 - public / private broadcasters & Ministry of Economic Affairs

Italy – coverage in place, awaiting regulatory approval

Coverage map



- DAB+ services licensed in Trentino (Q4 2012)
- Two trial national multiplexes (70% population coverage)
- RAI committed to roll out DAB+ over next three years

France – launching in June 2014



- Licences awarded for Paris, Nice and Marseille
- DAB+ approved Sept 2013
- Launch in June 2014¹

Poland – first steps



- Polskie Radio started DAB+ in October 2013
 - Warsaw
 - Katowice
- Eight more cities in 2014¹

Sweden – decision on DAB+ next year



- Government and broadcaster support for DAB+ (June 2013)
- Special advisor appointed
- Parliamentary decision in 2015

Australia – leaping ahead



- DAB+ launched 2009
 - five major cities
- 1.6m devices sold (400k p.a.)
 - 16% household penetration
- DAB+ standard in several car models¹

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EBU calling for DAB / DAB+ across Europe

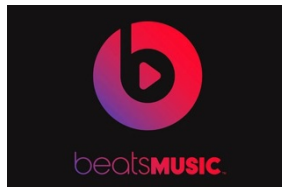
EBU


EBU recommendations

- Digital broadcast backbone¹
- Devices to offer analogue & digital²
 - consumer
 - automotive
 - smartphones
- Harmonisation across Europe

The competitive landscape for radio is changing

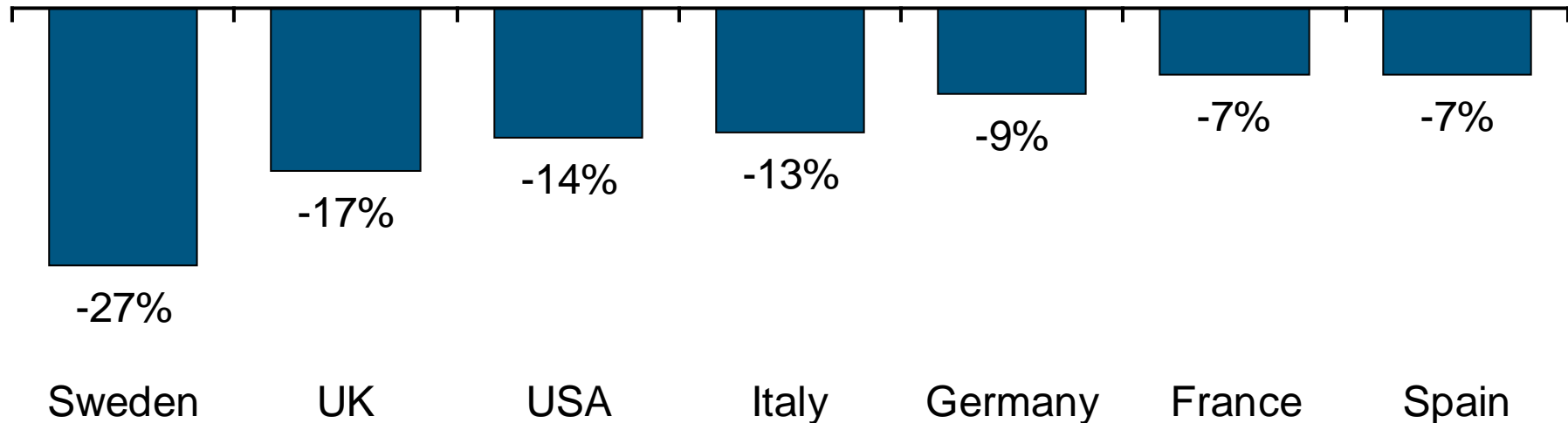
Online music services



- 
- Digital music services
 - Smart devices
 - Competition for FM radio

Younger audiences are listening less

Changes in youth per capita listening hours, 2006-10¹



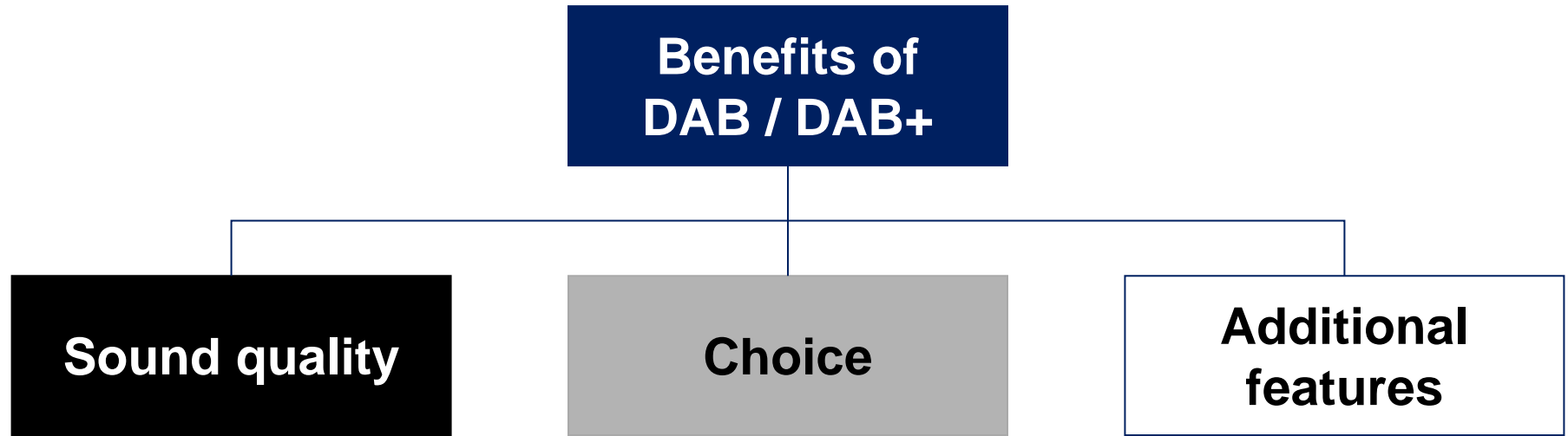
Note: (1) Definition of youth varies by market; e.g. Sweden (9-19s), UK (15-24s); US data 2006-08 & 2009-11 (new methodology in 2009). Source: EBU (Europe), Arbitron (US).

In many markets, FM spectrum is full



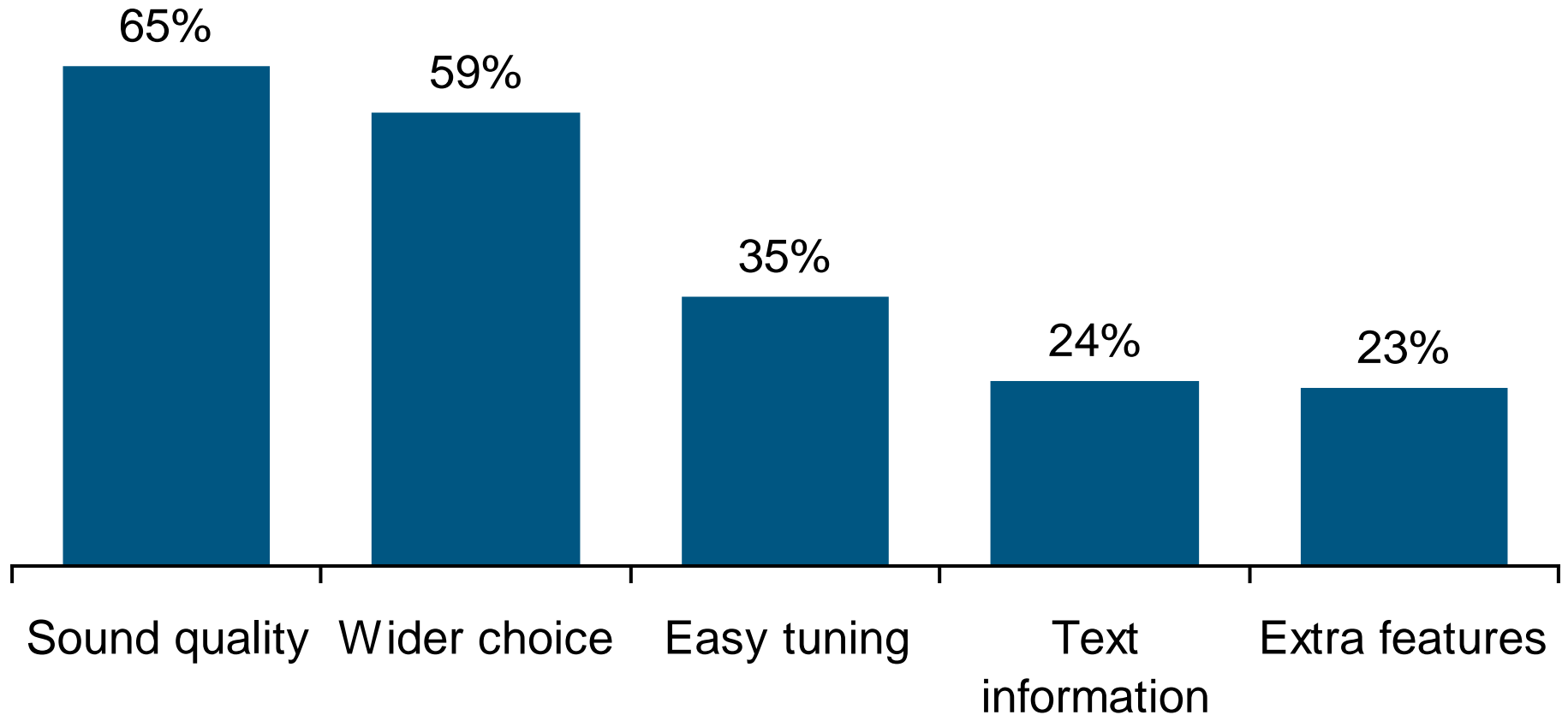
- Overloaded airwaves
- No capacity for new services
- Difficult to innovate

Digital radio offers solutions



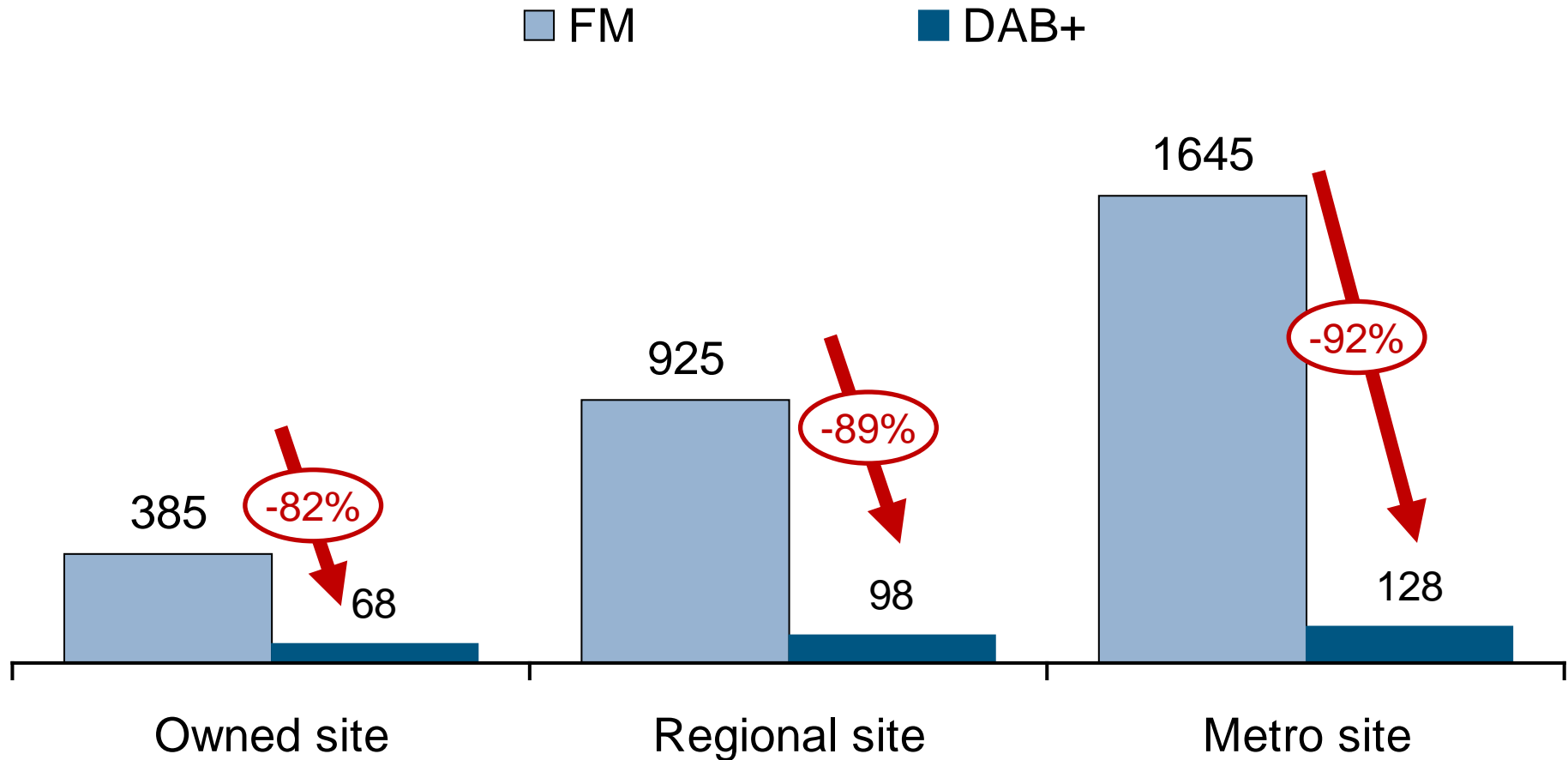
Sound quality and choice are top two benefits

UK, % benefits of digital radio



DAB+ offers significant efficiency savings

Annual cost to broadcasters of transmission per service¹, \$k



DAB / DAB+ radios now mass market

Prices
from €20

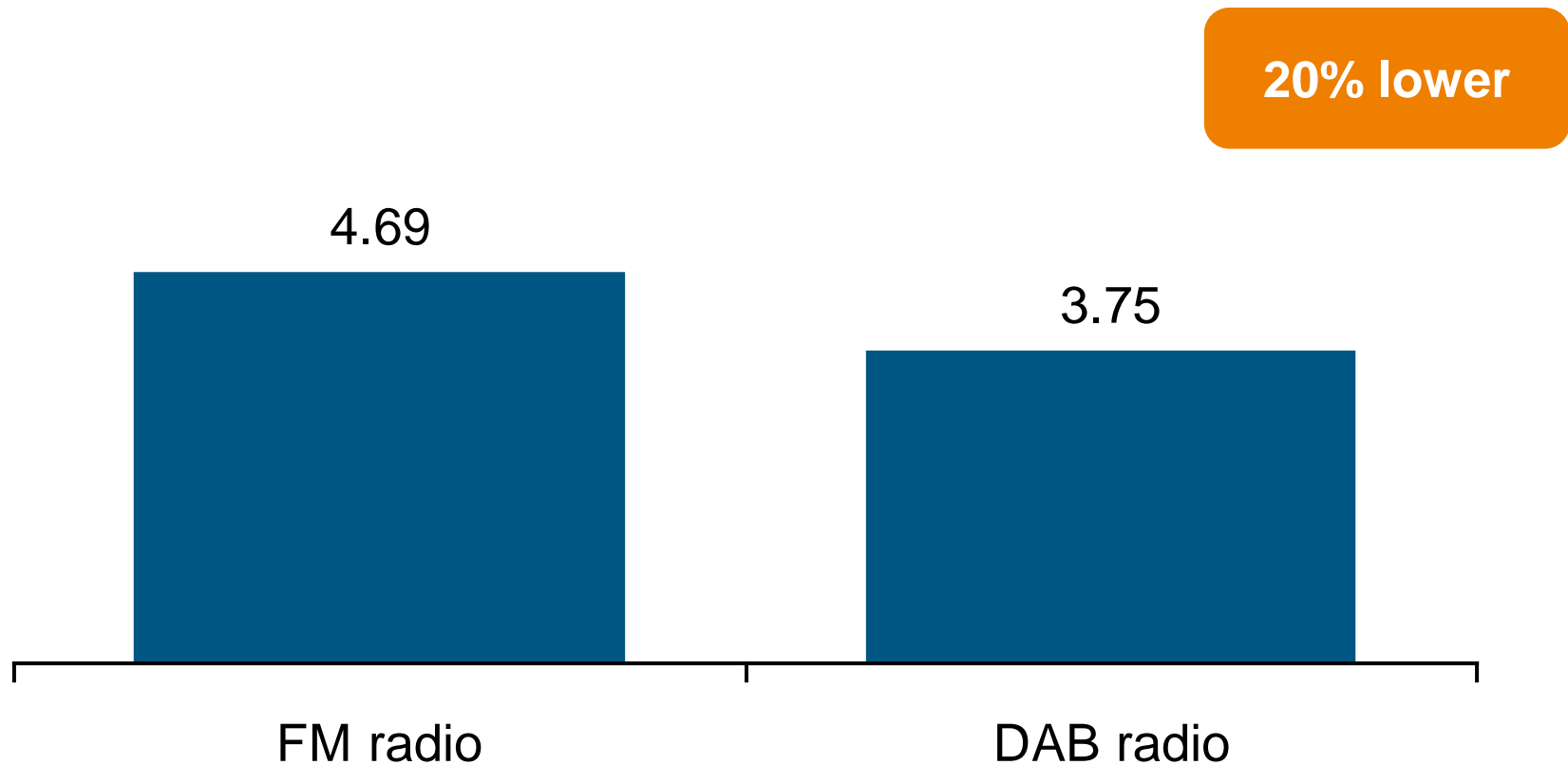


Over 300 receivers available

- Portables
- Clock radios
- Home audio systems

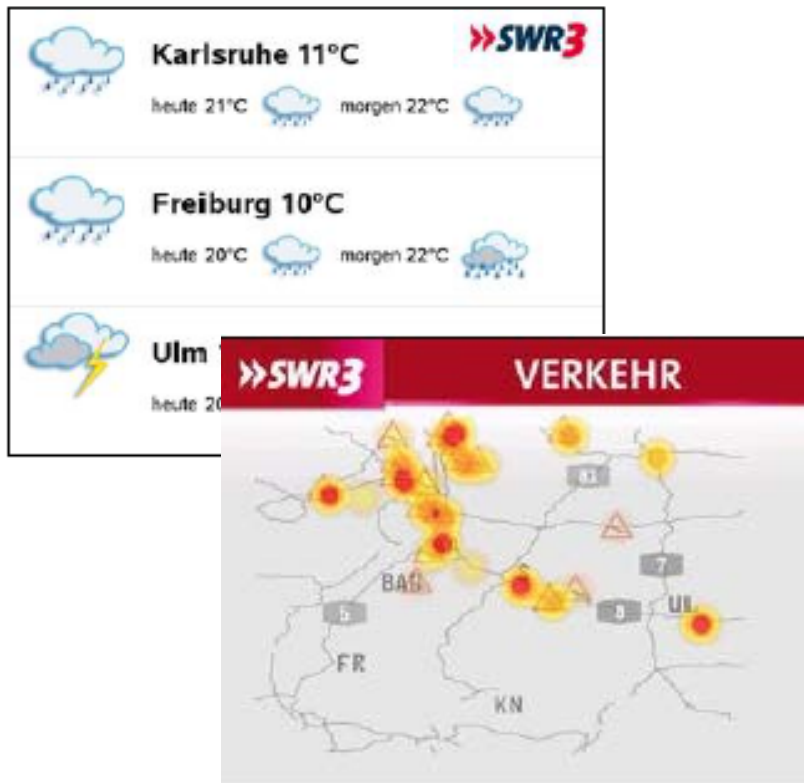
Digital radios consume 20% less power than FM devices

Power consumption of in-use devices, W



Digital radio enables data services – at-home and in-car

Categorised slideshow



TPEG



Enhanced traffic information

Automotive brands offering DAB – increasingly as standard



Conclusions

Europe

- Momentum growing
 - German launch key development
-

Benefits

- Better quality sound, greater choice
 - Innovation
-

Why now?

- Mass market devices available for home and car
- International support

Summary

1. European momentum building

- UK seen as key innovator
- Norway first country to commit to DSO

2. Germany focus for rest of Europe

- Italy near tipping point; France watching closely

3. Automotive and smartphones key priorities: international co-operation required

Thank you

For further information, please contact:

www.worlddab.org