



DAB+ international update

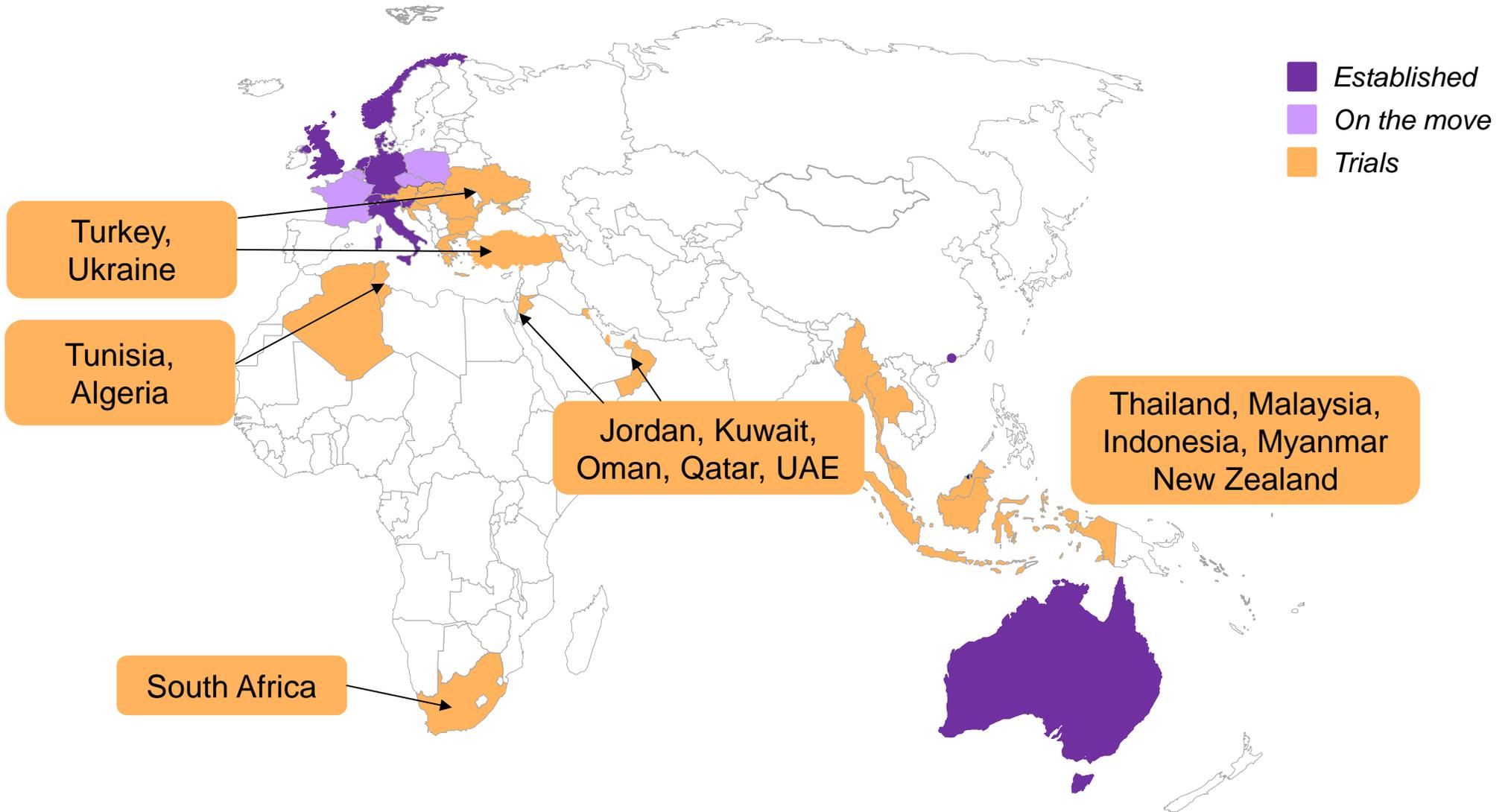
Bernie O'Neill, Project Director, WorldDAB

Kuala Lumpur, 5 March 2018

Contents

- Where does DAB+ stand today ?
 - Global status – country rollouts
 - Progress in last 12 months
 - Receivers, including cars
- Why radio needs DAB+
- WorldDAB activities
- Where you'll find us in Asia Pacific in 2018

DAB+ around the world



Middle East and South Africa investigating potential

Arab States
Broadcasting
Union
recommends DAB+

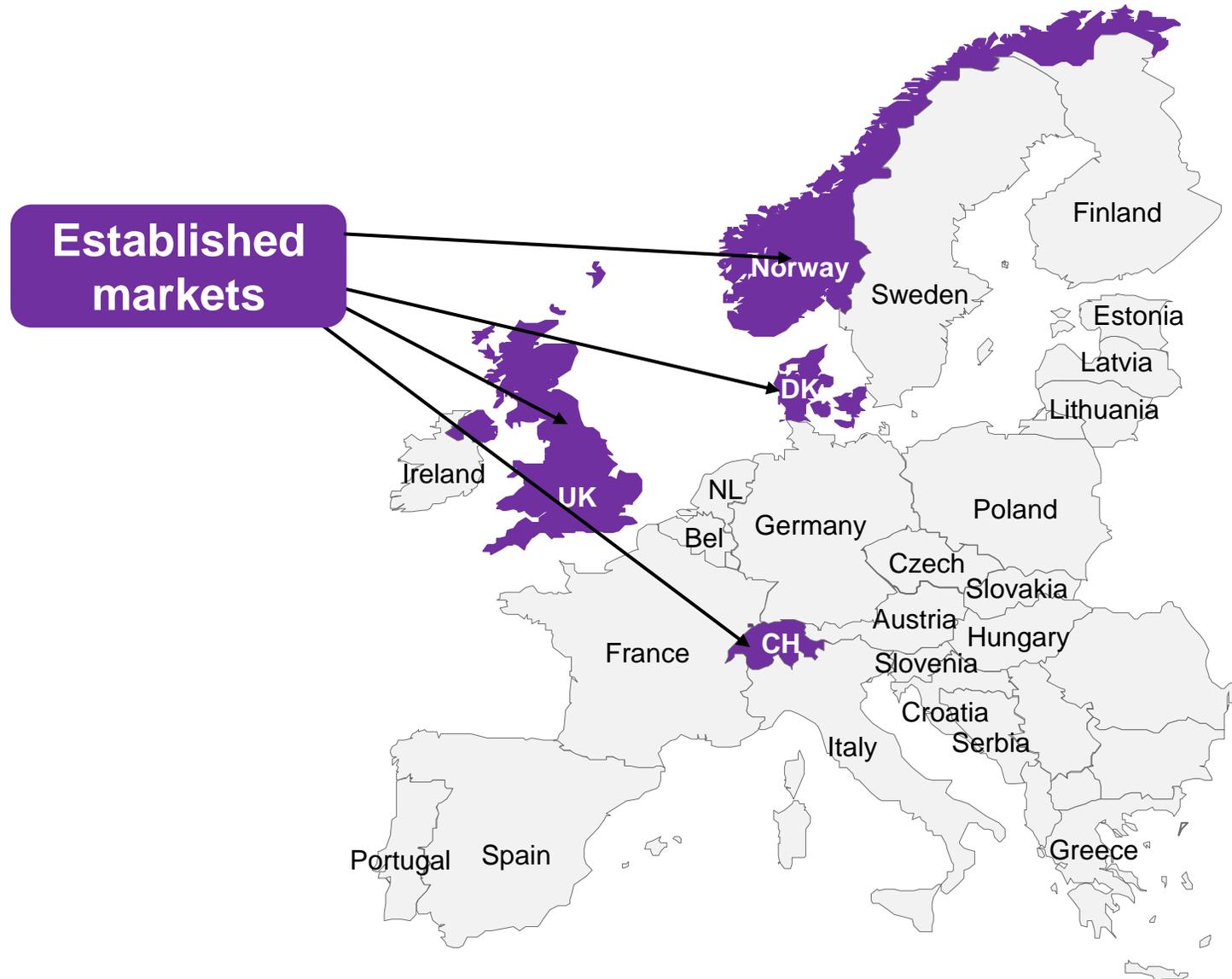
Interest and/or
trials also in:
Bahrain
Jordan
UAE
Qatar
Tunisia
Algeria



DAB+ on air in
Kuwait and
trials/regulation for
DAB+ in several
other Gulf States

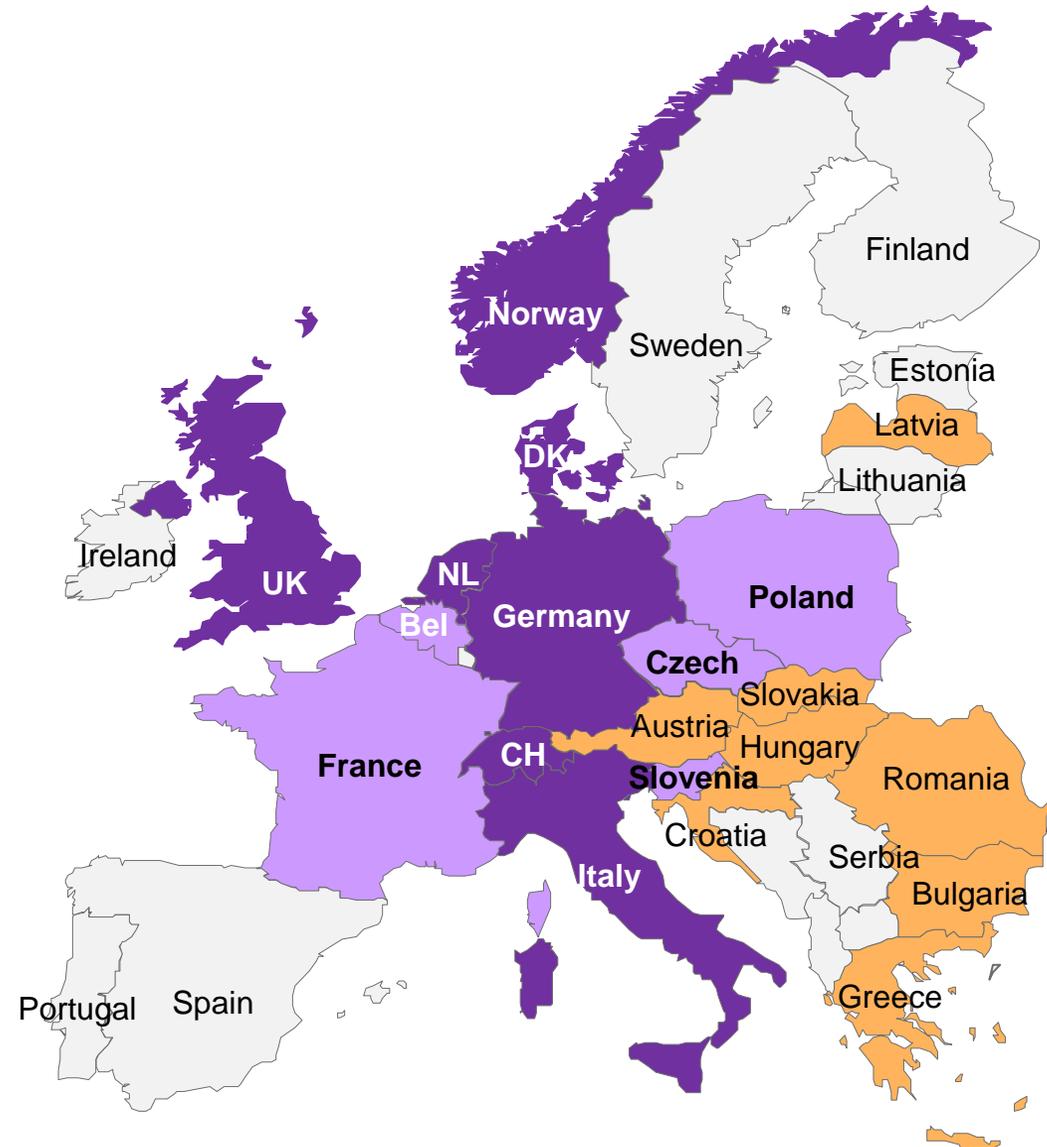
South Africa DAB+
trial covering 20%
population

Eight years ago, four DAB markets



With DAB activity across most of Europe

-  *Established markets*
-  *Regular services*
-  *Trials*



In last 12 months, significant DAB progress: Norway switched off FM



Switzerland preparing for Digital Switchover



2020

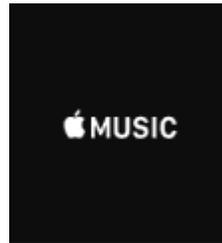
Radio needs DAB+

New ways of listening



Competition is intense

Services and aggregators



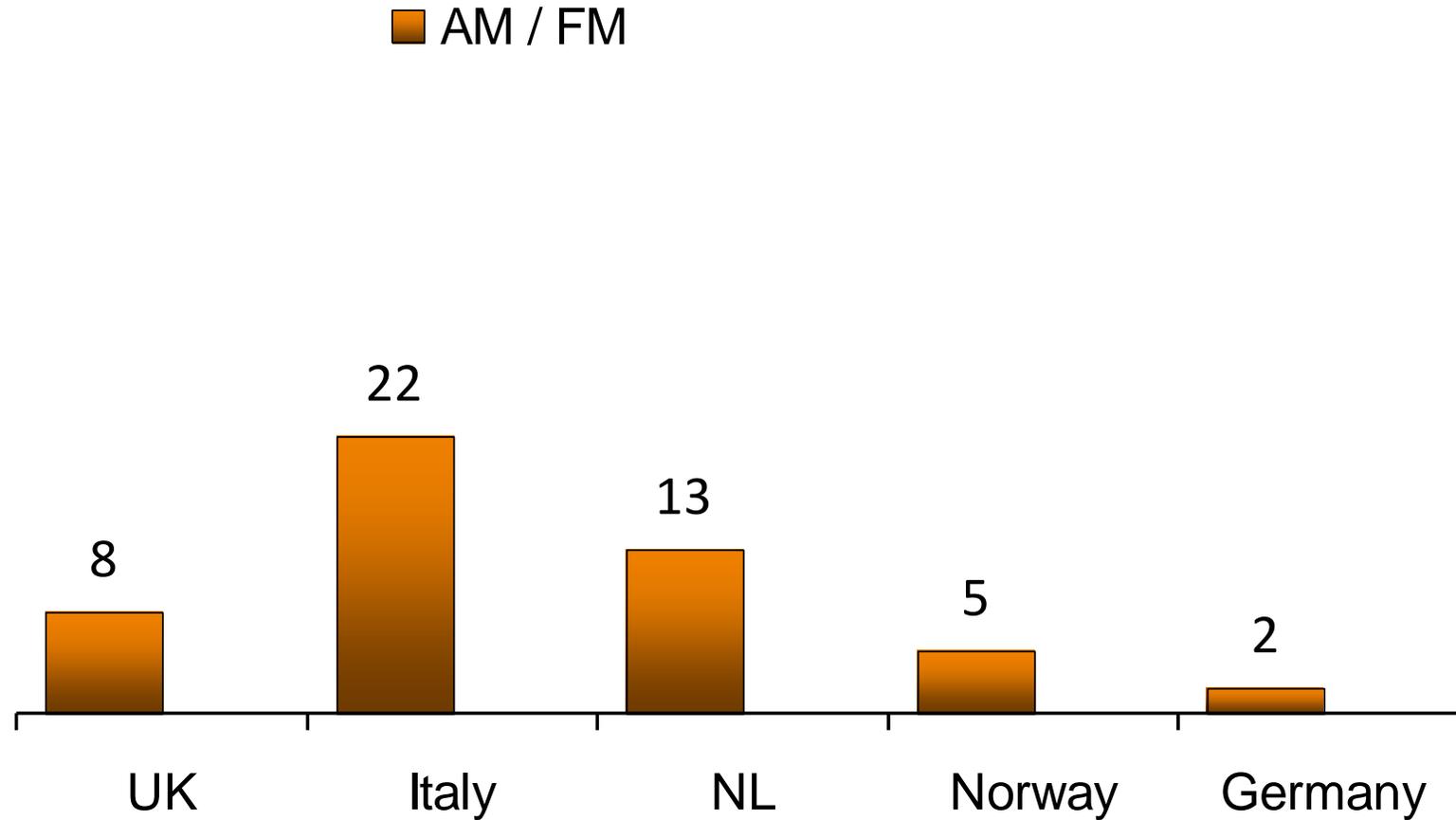
- To secure its future, radio needs to
 - innovate
 - retain its independence

New connectivity in cars



Limited capacity on FM

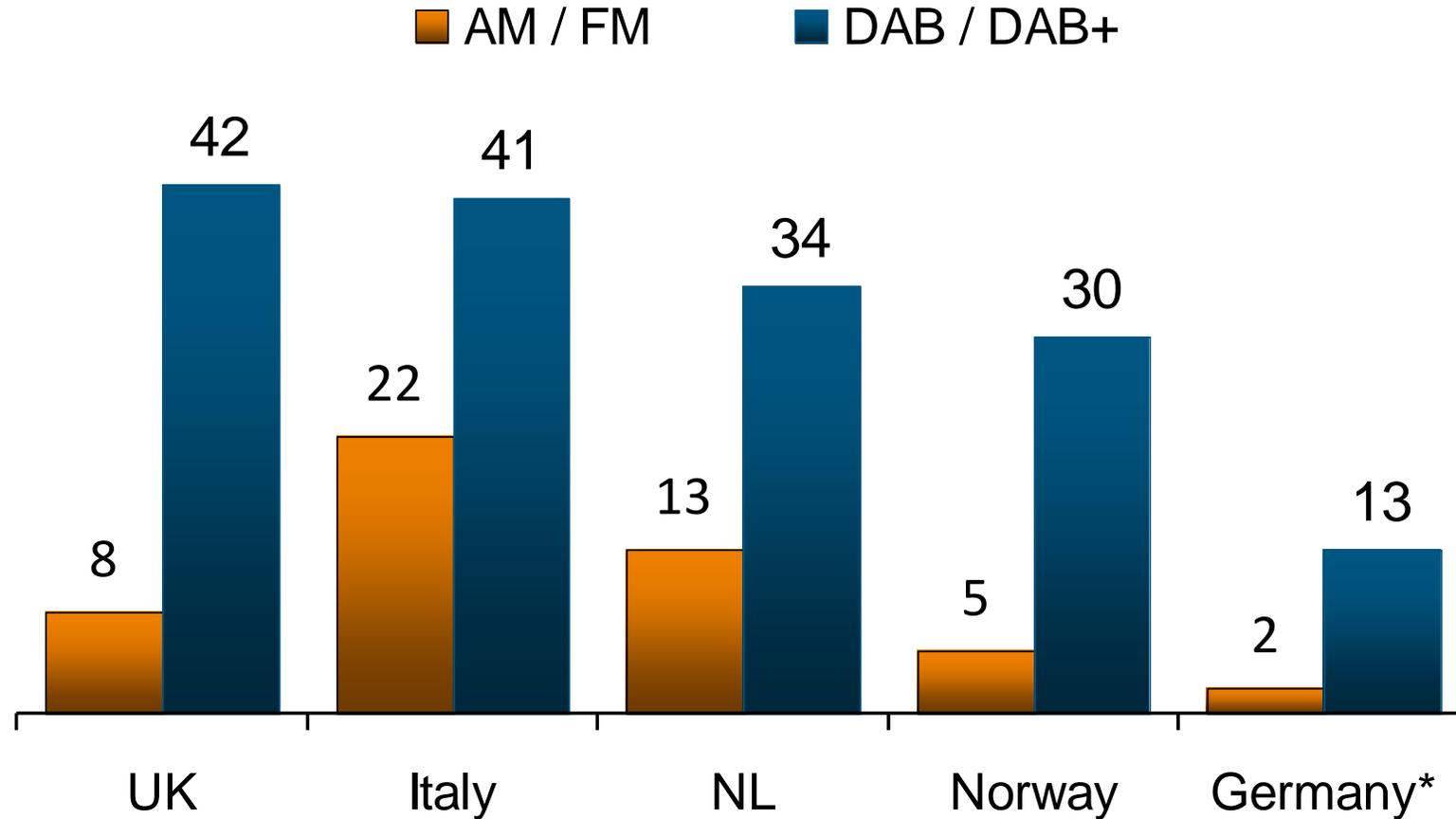
National radio services



What does DAB+ offer?

Up to six times as many services

National radio services



DAB+ offer benefits to listeners



DAB+ delivers benefits for society

Free to air / no gatekeeper

Reliability in
emergencies &
emergency warning

Media
plurality

Enhanced traffic
information

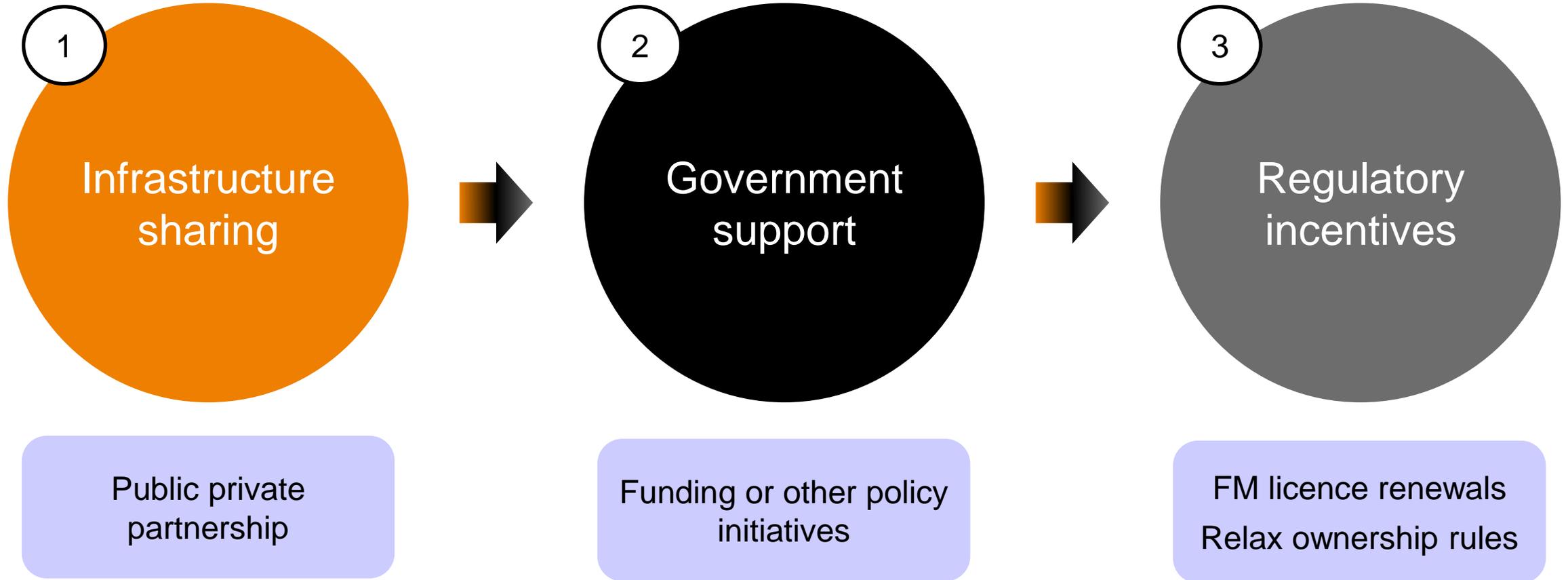
Spectrum
efficiency



Broadcaster concerns

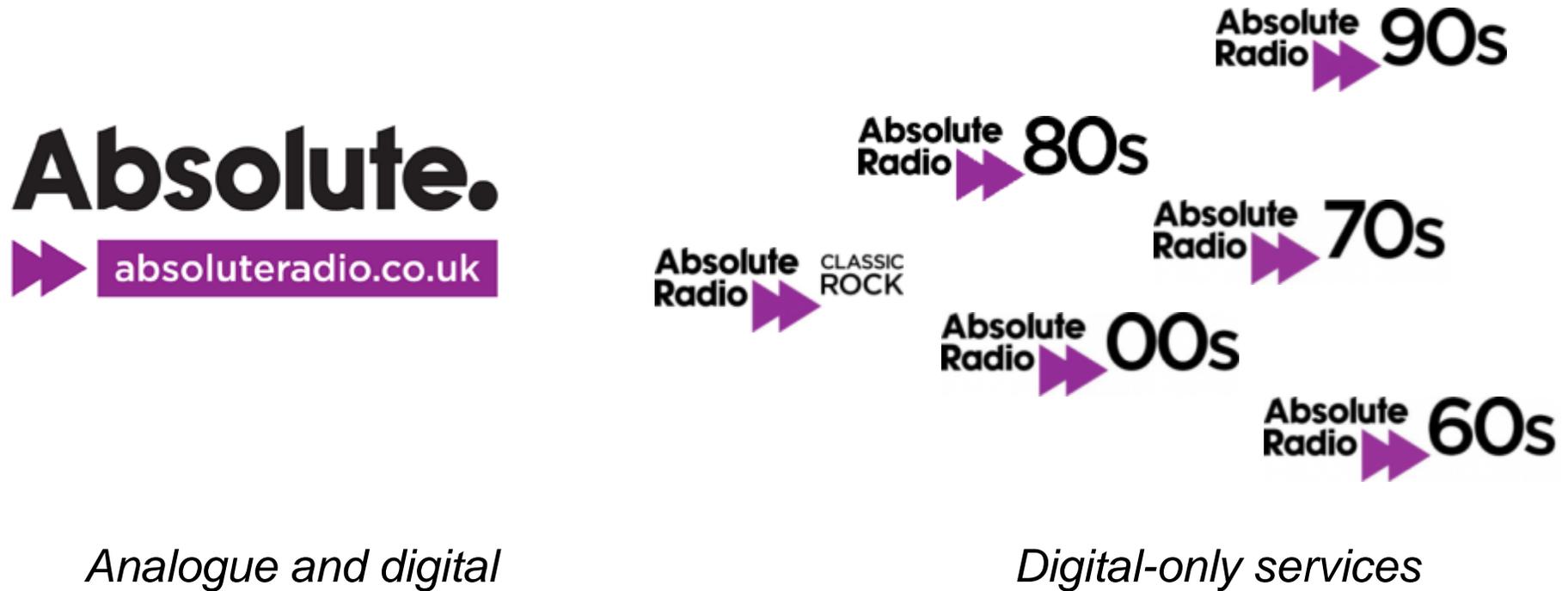
1. How do I control my costs?
2. Will I lose listeners?
3. What about receivers?

Successful strategies of established markets



Listeners: key to success is innovation

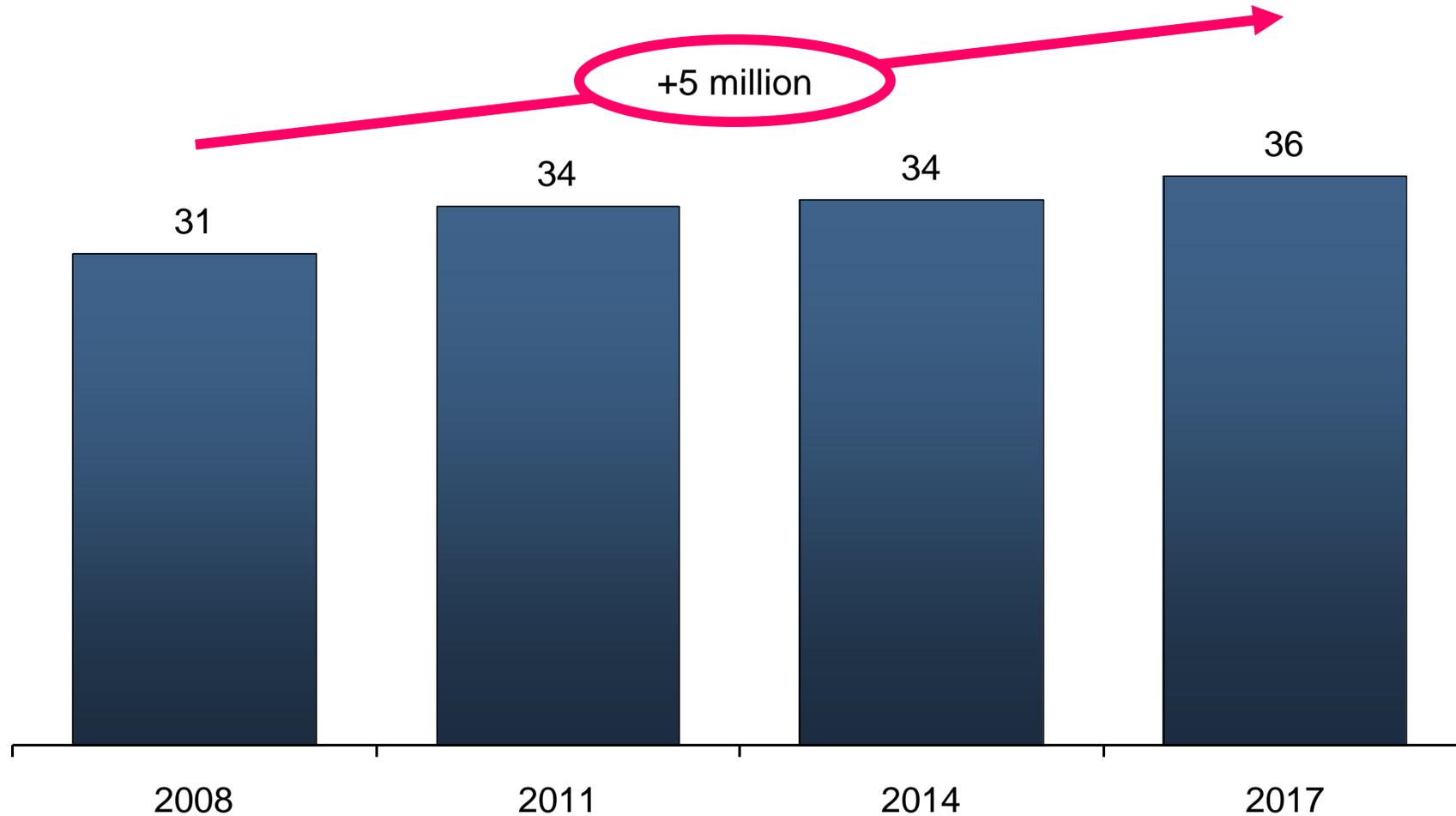
Brand extension strategy



Audience up 136% in seven years

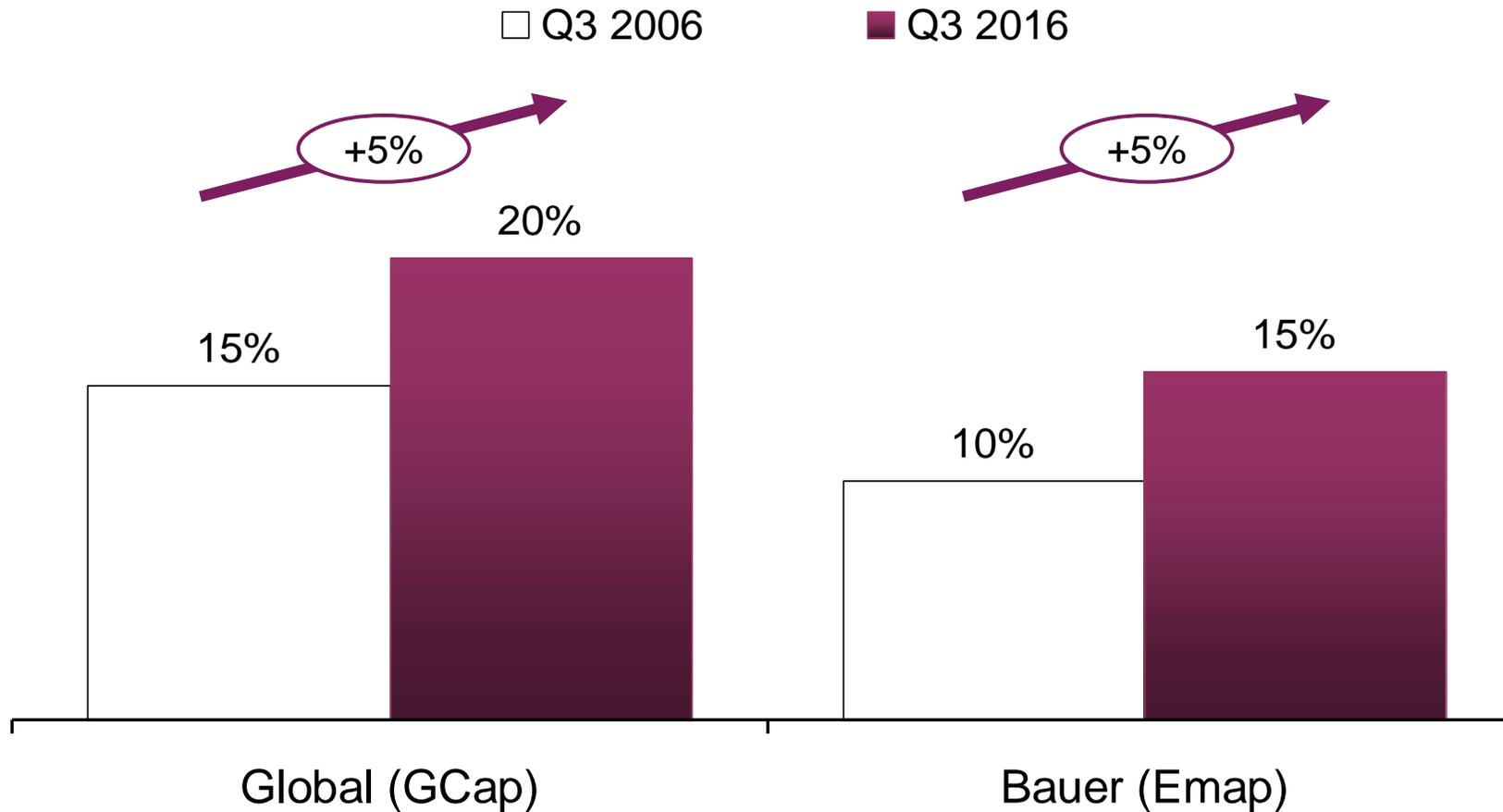
Reach of UK commercial radio has increased by 5 million in last ten years

Weekly reach of UK commercial radio, millions



Existing players are the winners

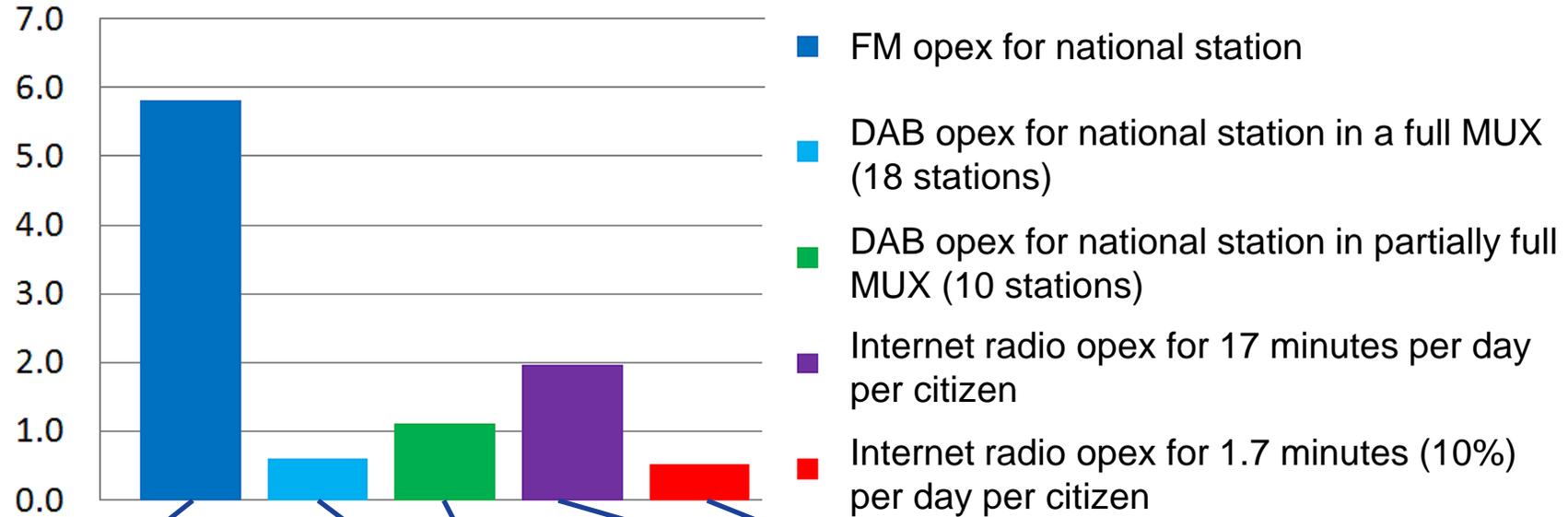
% share of UK listening, top two private groups



- Organic growth
- Acquisitions

A perspective: radio distribution cost analysis (source: EBU)

OpEx comparison in M\$



FM is by far the most expensive distribution technology

Due to multiplex technology, DAB is inexpensive. In the best case it could be 10 times cheaper than FM

The expense for internet distribution is highly variable and can easily grow larger than DAB, similar to FM

Receivers are now mass market



- 60 million receivers sold*
- Prices from USD 20

Home receivers

Different functionality for different areas of the home

Kitchen, Living room and Bedrooms

- Stand alone or HiFi connected
- Easy to operate
- Good sound and external connections to HiFi
- Good DLS display



Options

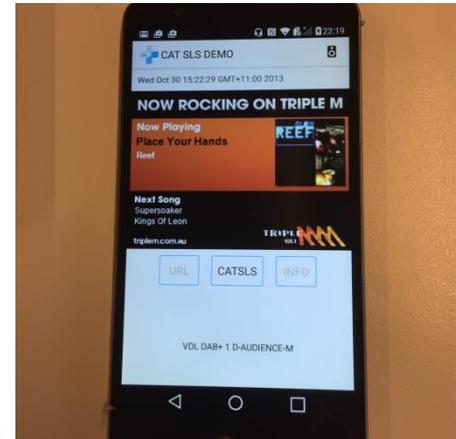
- More volume
- Colour screen
- Docking
- Smartphone control app



Personal / Portable / Smartphone receivers

Portable for a variety of situations

- Work
- Relaxing
- Exercising



Consistent marketing to consumers & stakeholders



European Parliament now supports regulation

Suggested Amendment (September 2017)

“Any radio set put on the market in the EU ... shall be capable of receiving digital and analogue terrestrial radio broadcasts¹”

Next phase:
talks between Parliament,
Commission and Member States

Automotive brands fitting DAB+



New cars with DAB growing rapidly

% of new cars with DAB+ digital radio



- 2.6 million new cars with DAB in 2017
- New cars fitted with DAB as standard:
 - 41% in core European markets¹
 - 42% in Australia
- Global volumes up 20% year on year

DAB now standard in cars in advanced markets

% of new cars with DAB / DAB+ digital radio



Norway

98%



UK

88%



Switzerland

66%

Our members

100+
Members

Across 29 countries



Connecting
1,250+
Industry Experts



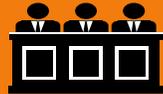
Broadcasters, regulators,
network providers,
manufacturers of receivers,
chips, professional equipment
and automobiles



MINISTRIES OF
TELECOMS



REGULATORS



BROADCAST
ASSOCIATIONS



BROADCASTERS



NETWORK
OPERATORS



END-TO-END
MANUFACTURERS



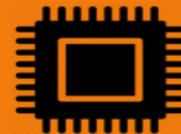
DEVICE
MANUFACTURERS



AUTOMOTIVE
MANUFACTURERS



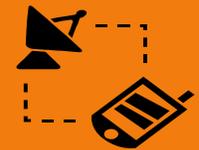
RESEARCH &
DEVELOPMENT



CHIP
MANUFACTURERS



SOLUTION
PROVIDERS



MONITORING
EQUIPMENT
MANUFACTURERS

7 new members since January 2018

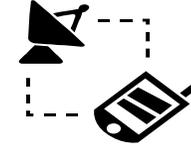


General Motors

Toyota



OIV Croatia

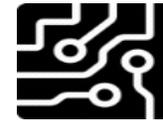


Avatec

Inovonics



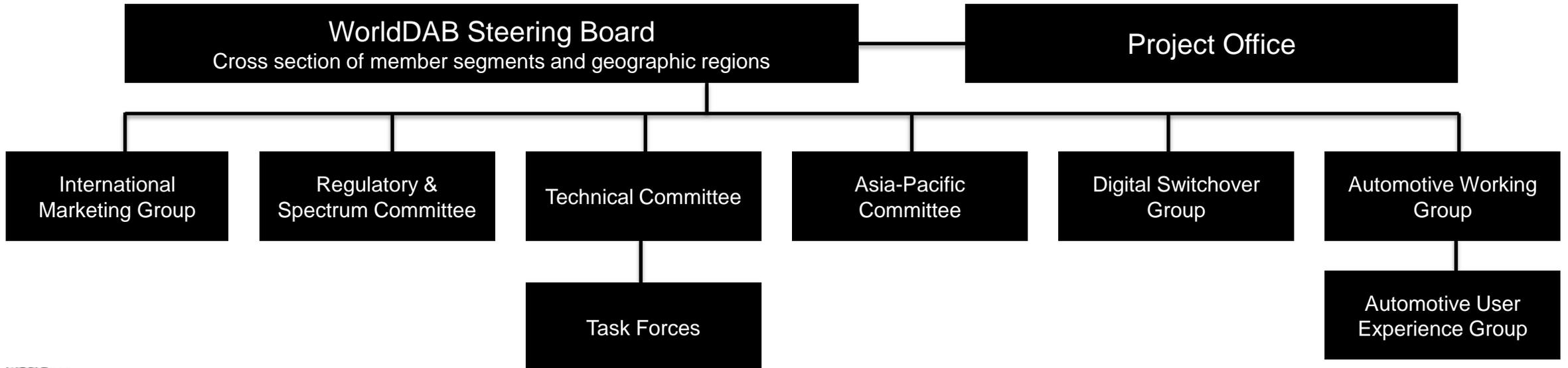
RAI Italy



Pluxbox

How we work

- Define and maintain **digital radio standards** based on the DAB family of standards
- Work with **broadcasters** (public and private), **policymakers** and **regulators** to adopt DAB digital radio and safeguard appropriate regulation and sufficient spectrum
- Encourage **receiver, automotive and mobile phone manufacturers** to include DAB in as many devices / vehicles as possible
- Support broadcasters by sharing **best practice** between stakeholders and encourage **collaboration** (national and international) to secure the successful deployment of DAB



Workshops on DAB+

- **Features**
- **Technical operation**
- **Network and RF planning**
- **Trials / demonstrations**
- **System design**
- **Assistance and guidance for local broadcasters**
- **Bringing equipment suppliers**
- **Connecting with receiver manufacturers**
- **Connecting with auto manufacturers**

Open

Collaborative

Innovative

Authoritative

Trusted

WorldDAB Asia Pacific events - 2018

- Broadcast Asia, Singapore, 26-28 June – radio stream on 27th
- WorldDAB/ABU/ASBU/AIBD DAB+ technical workshop and demo, 23-27 July Kuala Lumpur
- ABU General Assembly, October 2018

We await your invitation

Conclusions and next steps

- 1 DAB+ is making significant progress, thanks to industry collaboration – opportunity to share best practices
- 2 DAB+ is required to secure the future of radio
- 3 WorldDAB is here to help and support

Contact:



Bernie.oneill@worlddab.org



+44 (0) 207 010 0740



WorldDAB

