

Why Australia's commercial broadcasters embraced DAB+

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DAB+ key to keeping radio a competitive force

A vastly better radio experience for listeners with:

- 1** Enhanced sound
- 2** Better onscreen info and an intuitive user experience
- 3** More stations and content to appeal to diverse audience needs

Radio stations in Sydney

Sydney analogue services

From 18 services on AM and FM



Sydney digital services

To 50 including DAB+

DAB+ policy settings

- 1 Free spectrum
- 2 No restriction on the use of spectrum or formats
- 3 No new competitors for 6 years or more
- 4 Broadcasters or broadcaster consortiums in each market to own spectrum and multiplex licences

Phased approach to digital rollout

NEW MARKETS SWITCHING ON



Phase 1 - complete
5 markets on air (64% population)

Phase 2 - underway
15 regional markets being planned (over 80% pop coverage)

New stations – Kinderling Kids



KINDERLING



Foreign language stations



Retail and business partnerships

colesradio



Short term pop-up station Elf Radio



- Captures mood of the festive season
- Promoted with chance to win \$1,000 cash

Southern Cross Austereo DAB+ brand extension strategy

FM Parent station



FM Parent station



DAB+ Sub brands



DAB+ Sub brands



Moving to monetisation



SYDNEY RADIO - DAB+ STATIONS ONLY - SURVEY 3 2018

Cumulative Audience (000's) by Demographic, Listening via DAB+ or Internet, Mon-Sun 5.30am-12midnight

Station	People 10+			People 10-17			People 18-24			People 25-39			People 40-54			People 55-64			People 65+		
	This	Last	+/-	This	Last	+/-	This	Last	+/-	This	Last	+/-	This	Last	+/-	This	Last	+/-	This	Last	+/-
BUDDHA HITS	45	42	-3	3	2	1	*	*	*	24	20	4	13	10	3	3	5	-2	3	3	0
Chemist Warehouse Remix	17	15	2	1	1	0	*	*	*	14	14	0	*	*	*	1	*	*	*	*	*
Coles Radio	79	76	3	12	6	6	15	13	2	41	32	9	5	18	-13	6	8	-2	*	*	*
EASY HITS	69	37	32	12	5	7	7	*	*	28	12	16	12	14	-2	4	4	0	5	3	2
Edge Digital	137	106	31	15	13	2	29	34	-5	77	48	29	17	11	6	*	*	*	*	*	*
Kinderling Kids	39	31	8	6	6	0	*	*	*	31	18	13	2	8	-6	*	*	*	*	*	*
Koffee	51	40	11	11	4	7	4	3	1	28	23	5	4	5	-1	2	3	-1	2	1	1
MMM CLASSIC ROCK	77	77	0	8	9	-1	2	2	0	45	33	12	12	21	-9	10	10	0	*	2	*
MMM COUNTRY	20	n.a.	*	3	n.a.	*	2	n.a.	*	14	n.a.	*	*	n.a.	*	*	n.a.	*	1	n.a.	*
MMM GREATEST HITS	71	81	-10	22	17	5	3	6	-3	28	25	3	8	18	-10	8	8	0	3	8	-5
MMM MODERN DIGITAL	22	27	-5	8	9	-1	*	*	*	15	15	0	*	2	*	*	*	*	*	2	*
NTS News Talk Sport	46	39	7	11	5	6	4	6	-2	28	25	3	3	2	1	2	1	1	*	*	*
OLDSKOOL HITS	67	66	1	5	8	-3	5	6	-1	40	33	7	15	18	-3	*	*	*	1	1	0
The 80s iHeartRadio	74	63	11	5	8	-3	4	4	0	31	18	13	26	25	1	5	7	-2	1	2	-1
The 90s iHeartRadio	60	57	-3	5	9	-4	3	6	-3	28	25	3	10	14	-4	4	4	0	*	*	*
triple j Unearthed	65	63	2	19	18	1	6	9	-3	25	23	2	11	8	3	2	2	0	1	3	-2
ABC Country	69	54	15	7	6	1	8	7	1	43	28	15	4	8	-4	*	1	*	8	4	4
ABC Grandstand	89	66	23	9	7	2	7	7	0	39	20	19	18	13	5	10	7	3	6	13	-7
ABC Jazz	104	95	9	7	10	-3	5	3	2	62	41	21	19	20	-1	3	10	-7	7	11	-4
ABC KIDS LISTEN	64	n.a.	*	16	n.a.	*	2	n.a.	*	36	n.a.	*	9	n.a.	*	1	n.a.	*	*	n.a.	*
Double J	77	75	2	7	11	-4	2	8	-6	37	30	7	23	22	1	7	4	3	*	*	*
Total Digital/Internet Only	705	698	7	81	83	-2	70	86	-16	287	244	43	183	180	3	62	63	-11	32	41	-9

Cumulative Audience (000's) by Session, Listening via Digital or Internet, P10+ [Potential: 4465]

Station	Mon-Fri 5:30am-12mn		Breakfast Mon-Fri 5:30am-9:00am		Morning Mon-Fri 9:00am-12:00md		Afternoon Mon-Fri 12:00md-4:00pm		Drive Mon-Fri 4:00pm-7:00pm		Evening Mon-Fri 7:00pm-12:00mn		Weekend Sat-Sun 5:30am-12mn								
	This	Last +/-	This	Last +/-	This	Last +/-	This	Last +/-	This	Last +/-	This	Last +/-	This	Last +/-							
BUDDHA HITS	38	39	-1	25	27	-2	15	19	-4	11	19	-8	16	12	4	14	14	0	25	30	-5
Chemist Warehouse Remix	12	13	-1	4	4	0	2	2	0	1	1	0	*	3	*	8	6	2	5	3	2
Coles Radio	58	58	0	8	3	5	8	21	-13	16	26	-10	31	26	5	20	15	5	35	29	6
EASY HITS	58	29	29	14	5	9	25	12	13	31	20	11	19	13	6	11	1	10	25	12	13
Edge Digital	124	97	27	68	54	14	51	33	18	37	37	0	53	44	9	36	24	12	66	40	26
Kinderling Kids	27	26	1	13	8	5	10	11	-1	8	7	1	9	11	-2	10	11	-1	21	17	4
Koffee	34	27	7	11	7	4	9	6	3	12	14	-2	9	8	1	10	8	2	24	22	2
MMM CLASSIC ROCK	62	54	-2	35	28	7	21	18	3	27	22	5	14	24	-10	13	16	-3	44	43	1
MMM COUNTRY	15	n.a.	*	9	n.a.	*	2	n.a.	*	1	n.a.	*	2	n.a.	*	6	n.a.	*	10	n.a.	*
MMM GREATEST HITS	58	57	1	19	14	5	16	19	-3	23	27	-4	14	18	-4	17	17	0	33	39	-6
MMM MODERN DIGITAL	19	21	-2	8	6	2	4	2	2	6	10	-4	4	7	-3	6	6	0	6	8	-2
NTS News Talk Sport	39	29	10	22	10	12	9	6	3	7	10	-3	8	8	0	14	13	1	16	21	-5
OLDSKOOL HITS	58	57	1	20	17	3	15	15	0	20	19	-1	17	19	-2	20	22	-2	28	32	-4
The 80s iHeartRadio	51	43	8	22	14	8	16	12	4	18	18	0	14	14	0	17	14	3	32	39	-7
The 90s iHeartRadio	40	39	1	19	15	4	19	13	6	21	17	4	12	14	-2	1	8	-7	25	38	-13
triple j Unearthed	53	48	5	11	13	-2	11	10	1	20	27	-7	12	21	-9	17	14	3	23	26	-3
ABC Country	56	46	10	21	28	-7	6	9	-3	28	17	11	16	9	7	15	11	4	33	31	2
ABC Grandstand	53	39	14	20	6	14	2	3	-1	16	17	-1	12	11	1	28	19	9	52	40	12
ABC Jazz	90	79	11	36	28	8	16	13	3	33	35	-2	24	30	-6	36	30	6	53	53	0
ABC KIDS LISTEN	60	n.a.	*	21	n.a.	*	7	n.a.	*	14	n.a.	*	14	n.a.	*	14	n.a.	*	29	n.a.	*
Double J	68	60	8	24	24	0	23	23	0	23	27	-4	40	38	2	32	31	1	39	44	-5
Total Digital/Internet Only	616	597	19	326	279	46	260	221	39	291	321	-30	304	313	-9	248	223	25	459	452	7



- First DAB+ radio report released in 2015
- From 2018, DAB+ surveys are released 8 times a year alongside traditional AM/FM audience surveys
- Cumulative audience by demographic and by session for all stations
- Transparency and data insights for advertisers

Southern Cross Austereo aggregated audience reach



Incremental revenue growth

No additional sell for advertising on DAB+ stations

Where to next?



Digital Audio Broadcasting

- Innovation in car
- Consumers want more personalised services and interactivity
- DAB+ and the internet work hand in hand
- We see a multi-platform future for radio
- RadioApp means all analogue and DAB+ stations can be streamed from one app
- Keep audiences with radio rather than looking elsewhere

DAB+ helps radio evolve into broader entertainment brands

- Radio stations no longer just broadcasters
- DAB+ provides the technology to support an integrated offering so our listeners can listen, tweet, vote, buy and share



PWC Entertainment & Media Outlook 2018-2022



“The resilient radio industry will find growth over the forecast period via new products and distribution channels such as podcasts, streaming, on-demand and DAB+”

