Digital radio in Europe and France

Patrick Hannon, President WorldDMB

Paris: 10 February, 2015
Contents

1. Who we are
2. Position today
3. The way ahead
WorldDMB – who we are

• Not-for-profit membership organisation

• Developed DAB technical standards

• Promote digital radio (DAB / DAB+) around the world
87 members from 27 countries – across radio ecosystem

- Government ministries
- Regulators
- Public broadcasters
- Private broadcasters
- Network providers
- Equipment manufacturers
- Silicon providers
- Device manufacturers
- Automotive
- Industry bodies
13 new members in last 12 months

Broadcasters & authorities
- Arab States Broadcasting Union
- NBTC
- RRI
- eurodab
- KRRiT

Equipment & receivers
- PRAIS
- View Quest

Automotive
- BMW
- Hirschmann Car Communication
- Johnson Controls
- Panasonic
- FCA
- Visteon

WORLD DMB
Digital Multimedia Broadcasting
Contents

1. Who we are
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3. The way ahead
A digital radio wave is moving across Europe
Four core markets: UK, Norway, Denmark and Switzerland
Followed by Germany (2011) and Netherlands (2013)
Italy and Poland: on the move – with extensive coverage
France: first services on air – what next?

Established markets

New markets

On the move

France?
Norway: first to have digital switchover - in 2017

• Achieved criteria for 2017 DSO\(^1\)
  - DAB coverage: 99%
  - 53% of listeners use digital

• Government confirmation of date expected H1 2015

Source: Digitalradio Norge, Photo Norkring
Switzerland: digital switchover in 2020-24

- 99% coverage
- 39% of households have DAB
- Industry / regulator reported to Government\(^1\) in Dec 14
- DSO in 2020-24

United Kingdom: “future of radio is digital”

- Coverage: 95%
- 49% of households have DAB
- In 2015
  - 360 new transmitters
  - 2nd national commercial mux
  - Digital Tick for “future ready” devices
- Goal is Digital Switchover

(1) RAJAR  (2) UK Minister of Culture, Feb 2015
Denmark: digital switchover target 2019

- 37% have digital radio
- 3rd national mux (13 regions)
- Public information campaign in 2015
- FM switch-off target 2019
Germany: long term commitment to DAB+

• Launched August 2011
  - coverage over 90%

• Household penetration 7.5%¹
  - receiver sales growing at 68% year on year (Dec 2014)

• Nov 14: ARD confirms commitment to DAB+²

(1) Source: Die Medienanstalten Digitalisierungsbericht 2014, TNS Infratest
Netherlands – launched DAB+ Sept 2013

• 28 national services
  - 14 digital-only
• Coverage: 95%
• Heavyweight marketing activity
  - public / private broadcasters & Ministry of Economic Affairs
Italy – coverage 65% of population

Coverage map

- Two national commercial muxes
  - 65% population coverage
  - 3,500 km of roads

- National and local DAB+ services licensed in Trentino

- Licences for new regions announced in Dec 2014

(1) Piedmont, Umbria and Valle d’Aosta
Poland – coverage in ten cities (38% of population)

- Polskie Radio DAB+
  - launched Oct 13
  - ten cities: 38% population coverage
- By end 2015, 49% coverage

(1) http://www.worlddab.org/country-information/poland#coverage
Sweden – decision on DAB+ this year

- Public and private broadcasters strongly support DAB+
- Dec 14: Government advisor report\(^1\) proposes roadmap for DSO 2022-24
- Parliamentary decision Q4 2015

\(^1\) [http://www.regeringen.se/content/1/c6/25/09/45/79c09a15.pdf](http://www.regeringen.se/content/1/c6/25/09/45/79c09a15.pdf)
Australia – leaping ahead – and providing advice

- DAB+ launched 2009
  - five major cities
- 23% household penetration
- 100k cars with DAB+ as standard
- Published guide to launching DAB+ trial

Since 2004, 33 million digital receivers sold

DAB / DAB+ receiver sales (consumer and automotive), million

Over 400 consumer devices available

Prices from €20

http://digitalradio.de/index.php/de/digitalradios-geraete
The automotive sector is ready
In Norway and UK, over 60% of new cars have digital radio

% of new cars with DAB / DAB+ digital radio

- Norway: 63%
- UK: 62%
- Switzerland: 37%

Source: Digitalradio Norge, DRUK, MCDT
1. Who we are

2. Position today

3. The way ahead
EBU calling for harmonised approach across Europe

EBU recommendations

• Digital broadcast backbone\(^1\)

• Devices to offer analogue & digital\(^2\)
  - consumer
  - automotive
  - smartphones

• Harmonisation across Europe

• Harmonisation: create scale / accelerate market development

• Make radio “fit for purpose” in 21\(^{st}\) Century

Note: (1) Recommendation R138  https://tech.ebu.ch/docs/r/r138.pdf
Benefits to listeners

Benefits of DAB / DAB+

- Sound quality
- Choice
- Additional features
Digital offers new opportunities for broadcasters

1. Geographic coverage
   - Extend beyond analogue coverage area

2. Develop portfolio
   - New stations
   - Cross-promotion

3. Deepen user experience
   - Value add through text, visuals and interactivity
Case study: extend the brand portfolio

Analogue and digital

Digital-only services
Listening hours - up 108%

Weekly listening hours, m

- Absolute Radio (core service)
- Absolute digital-only services

Source: RAJAR

Q4 09: 13.0, 1.7
Q4 10: 15.8, 6.4
Q4 11: 18.8, 7.6
Q4 12: 22.8, 10.2
Q4 13: 25.3, 13.0
Q4 14: 27.1, 16.1

Listening hours - up 108%
**IP is not robust, free-to-air or anonymous**

<table>
<thead>
<tr>
<th>Objective</th>
<th>Issue</th>
<th>Digital radio</th>
<th>Internet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Critical mass of listeners</td>
<td>Robust (especially in emergencies)</td>
<td>✔️</td>
<td>❌</td>
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<tr>
<td></td>
<td>Cost-effective</td>
<td>✔️</td>
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</tr>
<tr>
<td>Consumer costs</td>
<td>Mobile data plans</td>
<td>✔️</td>
<td>❌</td>
</tr>
<tr>
<td></td>
<td>Mobile power consumption</td>
<td>✔️</td>
<td>❌</td>
</tr>
<tr>
<td>Strategic control / privacy</td>
<td>Gatekeeper / anonymity</td>
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Digital radio and connectivity should work together

Benefits of digital broadcast

- Rich content
- Free to air
- Robust (one to many)

Benefits of connectivity

- Personalised content
- Interactivity
- Additional information
Now is the time for France to move forward
Conclusions

1. In Europe, digital radio is past “point of no return”

2. Opportunity to ensure French radio is fit for the 21st century

3. The train is leaving - train will move faster if France is on board
Thank you

For further information, please contact:
www.worlddab.org