

EBU

OPERATING EUROVISION AND EURORADIO

EUROPEAN DIGITAL RADIO UPDATE

GRAHAM DIXON
HEAD OF RADIO, EBU

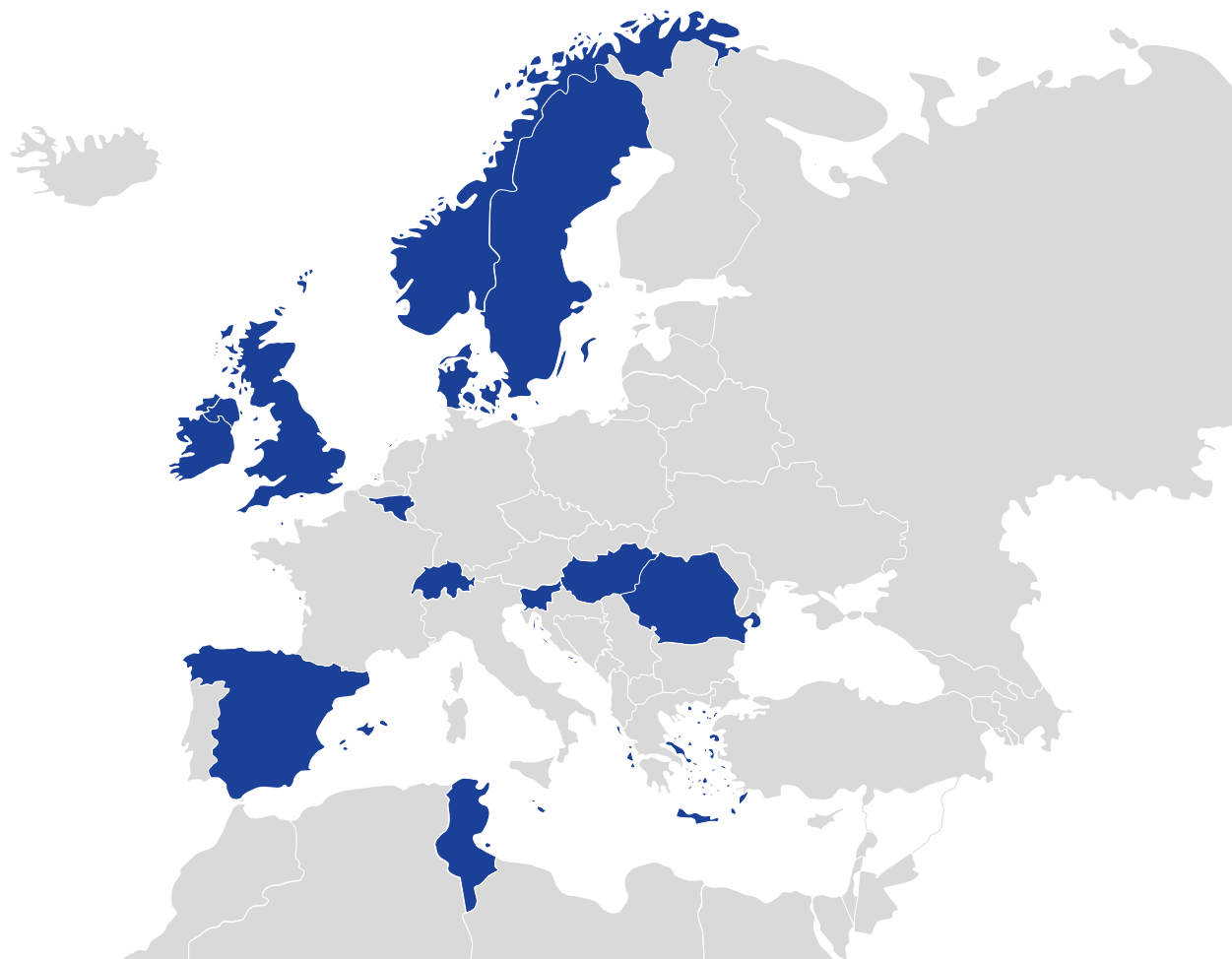
IBC
SEPTEMBER 2019



DIGITAL RADIO ACROSS THE EBU AREA



2010

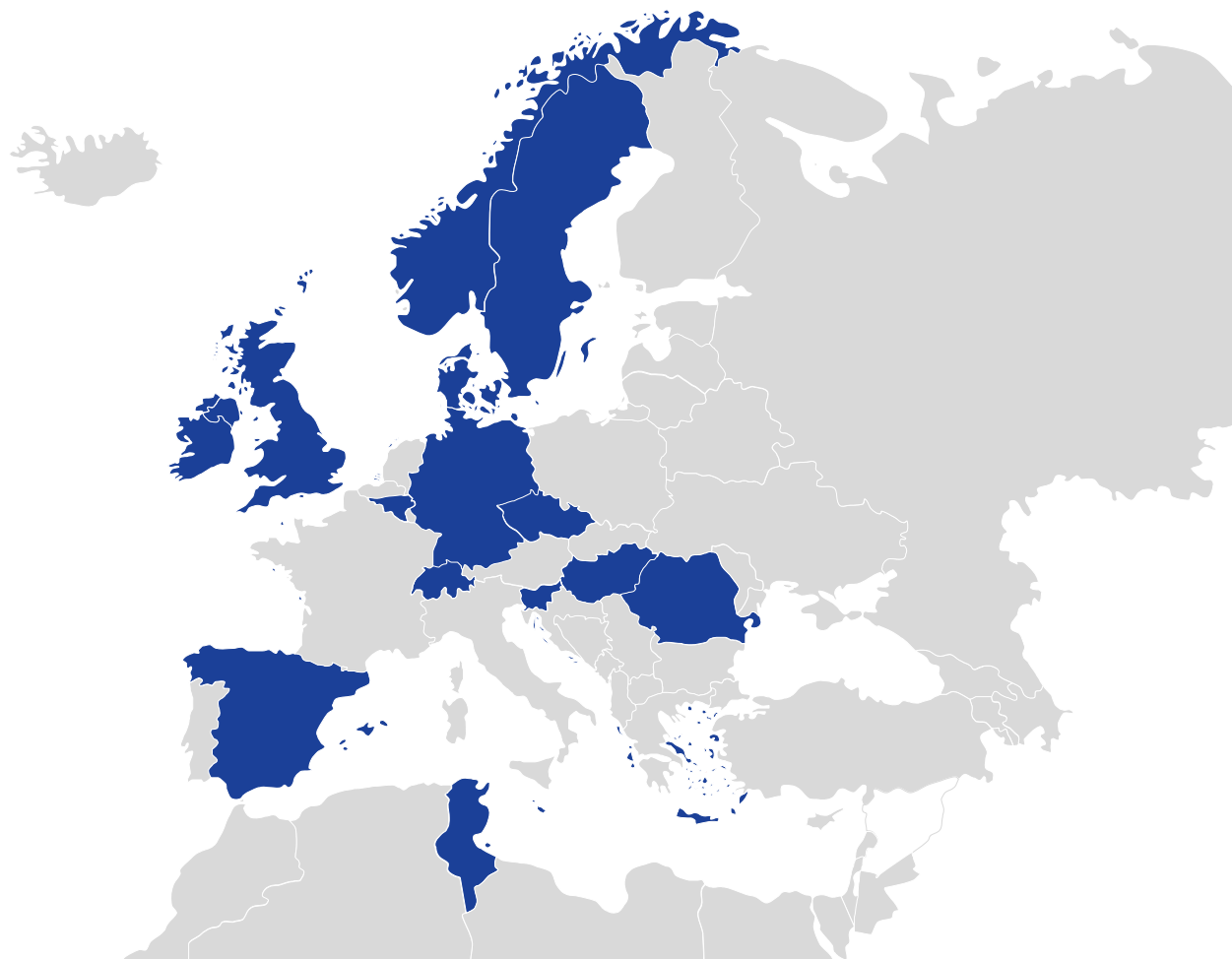


Source: EBU Media Intelligence Service

DIGITAL RADIO ACROSS THE EBU AREA



2011

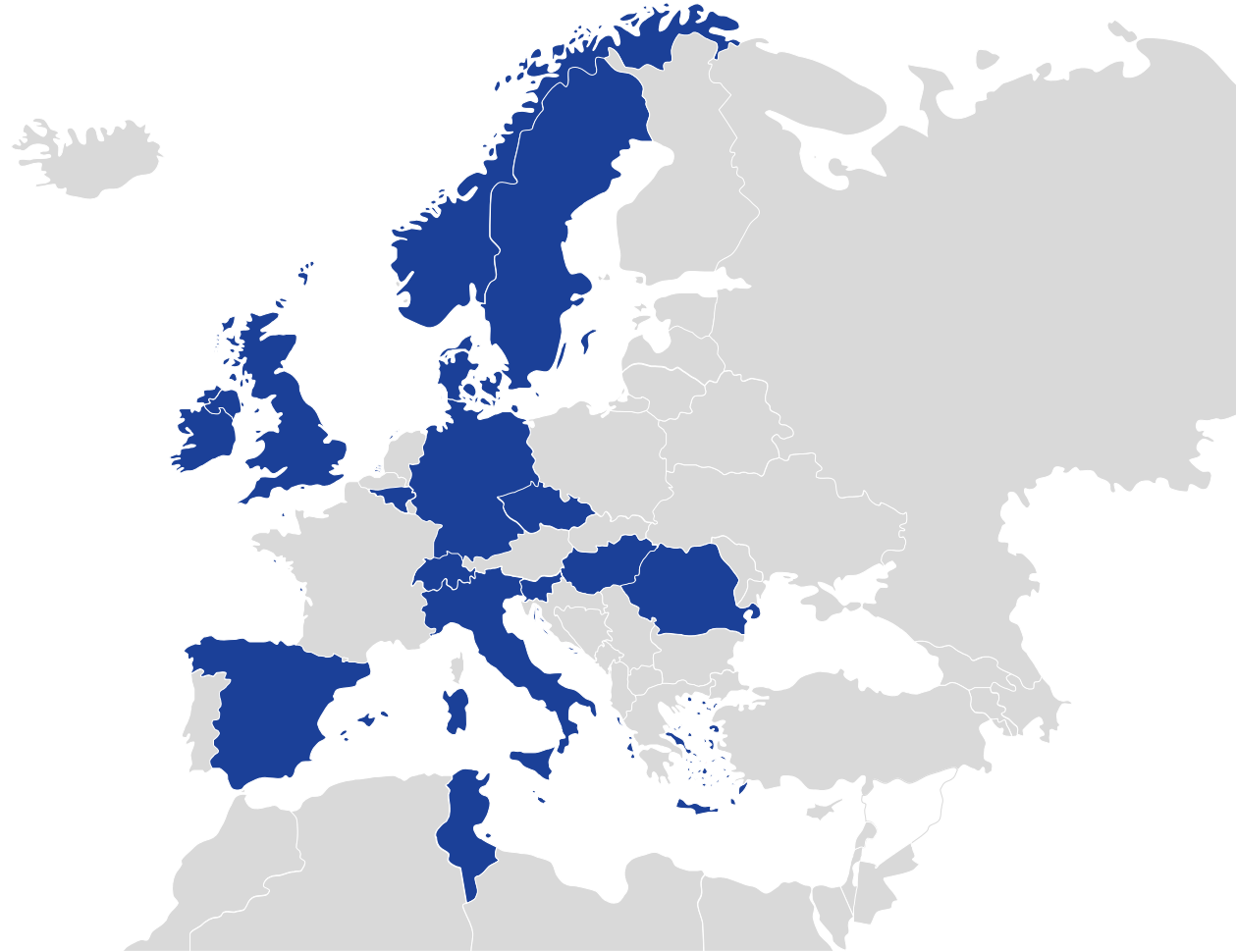


Source: EBU Media Intelligence Service

DIGITAL RADIO ACROSS THE EBU AREA



2012

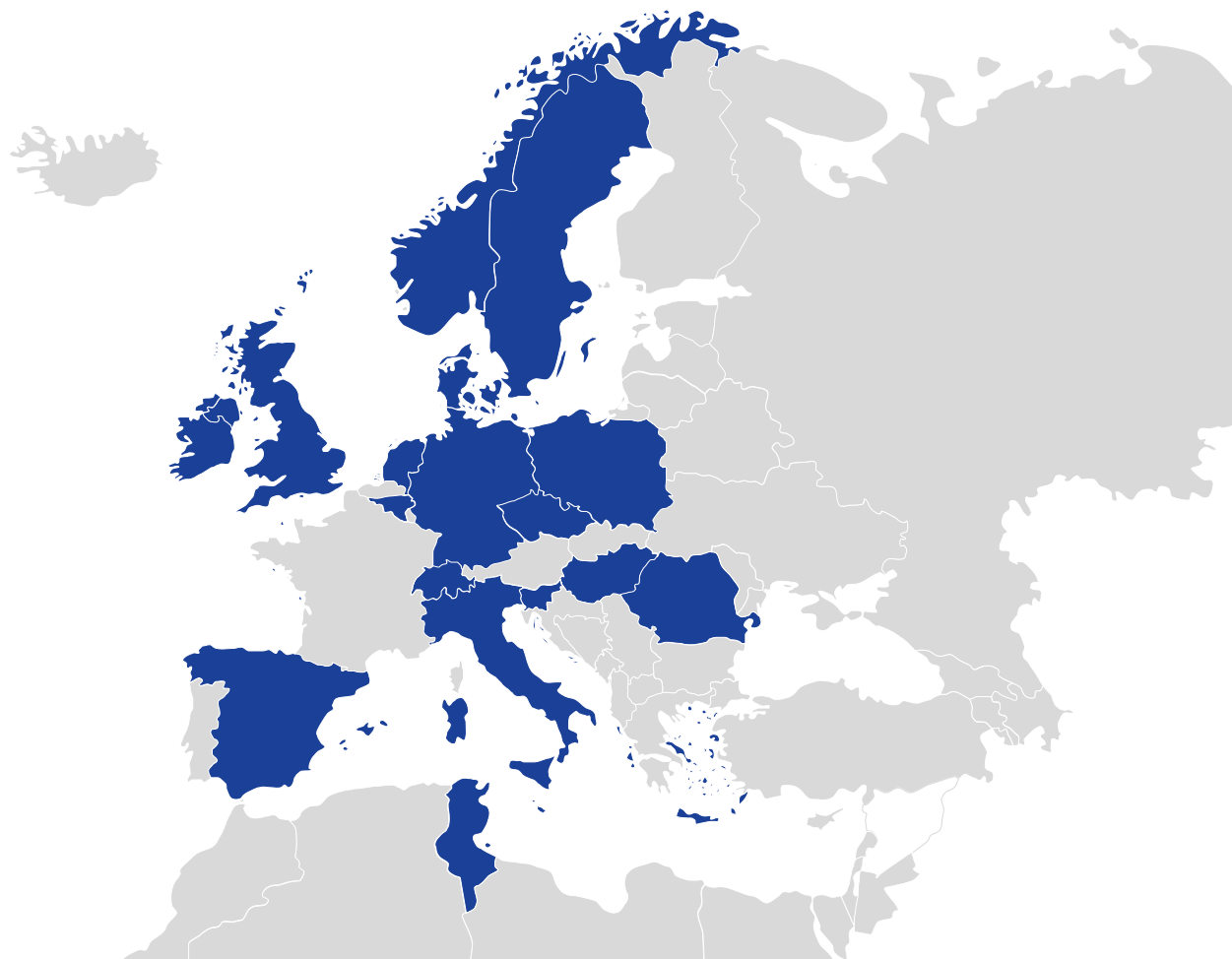


Source: EBU Media Intelligence Service

DIGITAL RADIO ACROSS THE EBU AREA



2013

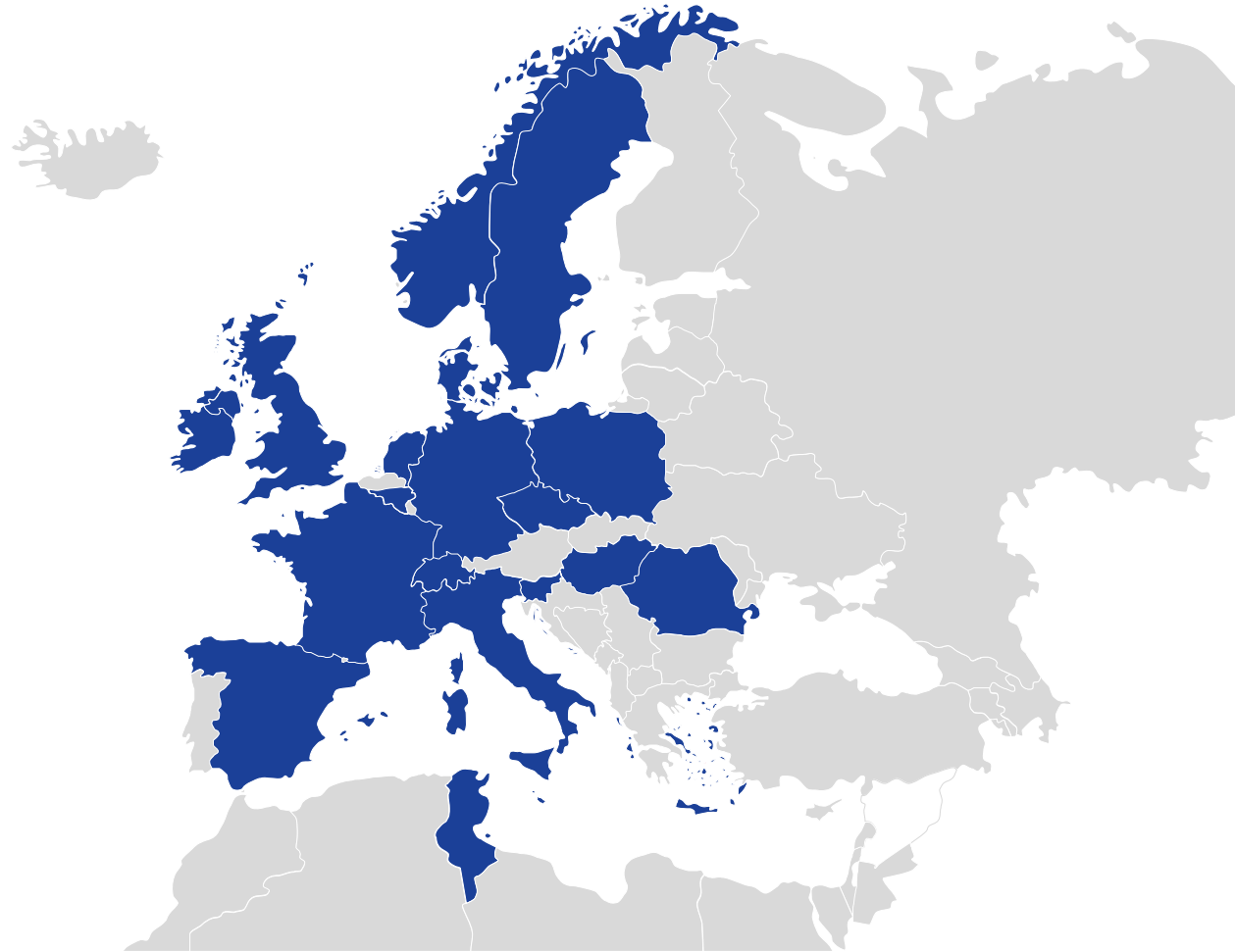


Source: EBU Media Intelligence Service

DIGITAL RADIO ACROSS THE EBU AREA



2014

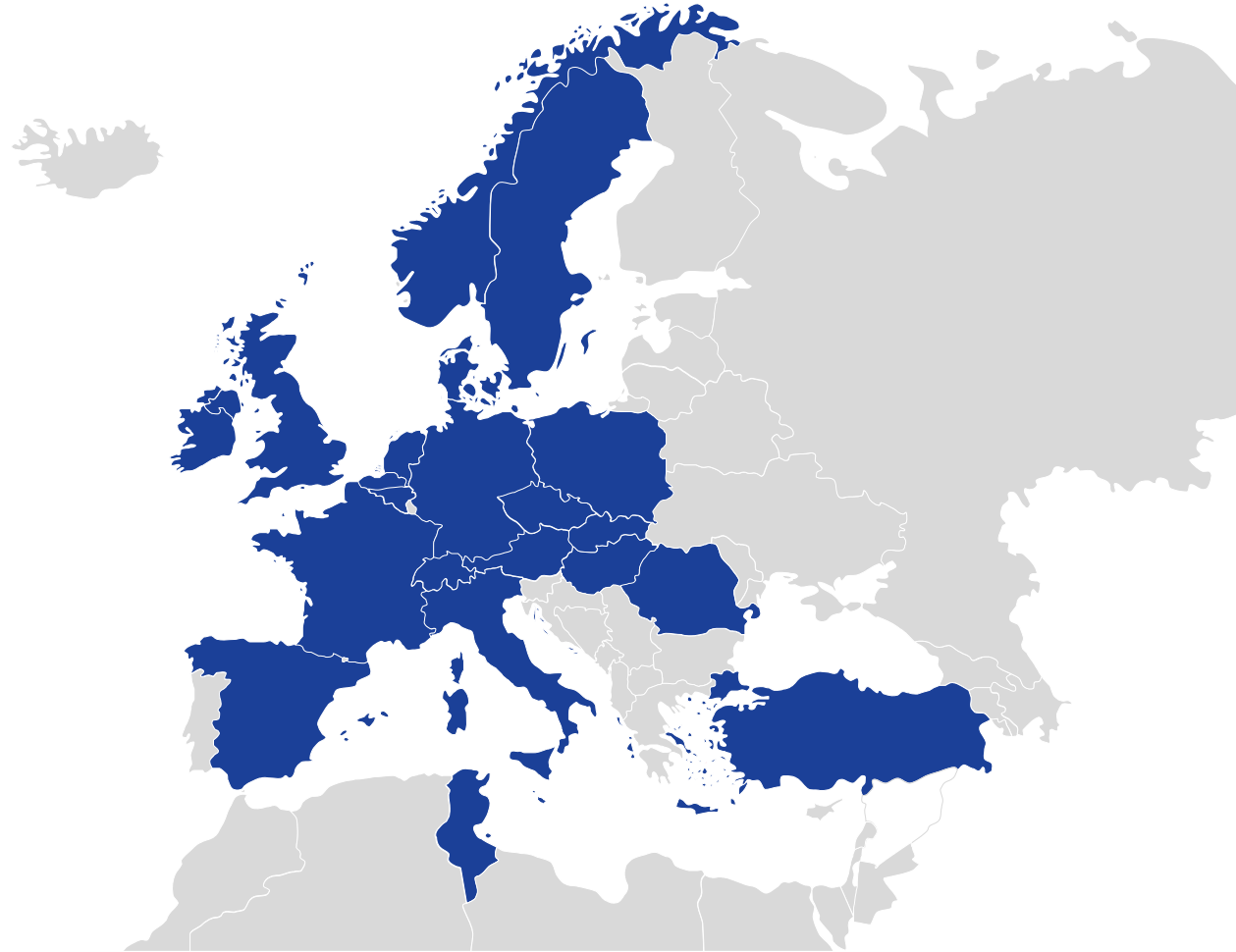


Source: EBU Media Intelligence Service

DIGITAL RADIO ACROSS THE EBU AREA



2015

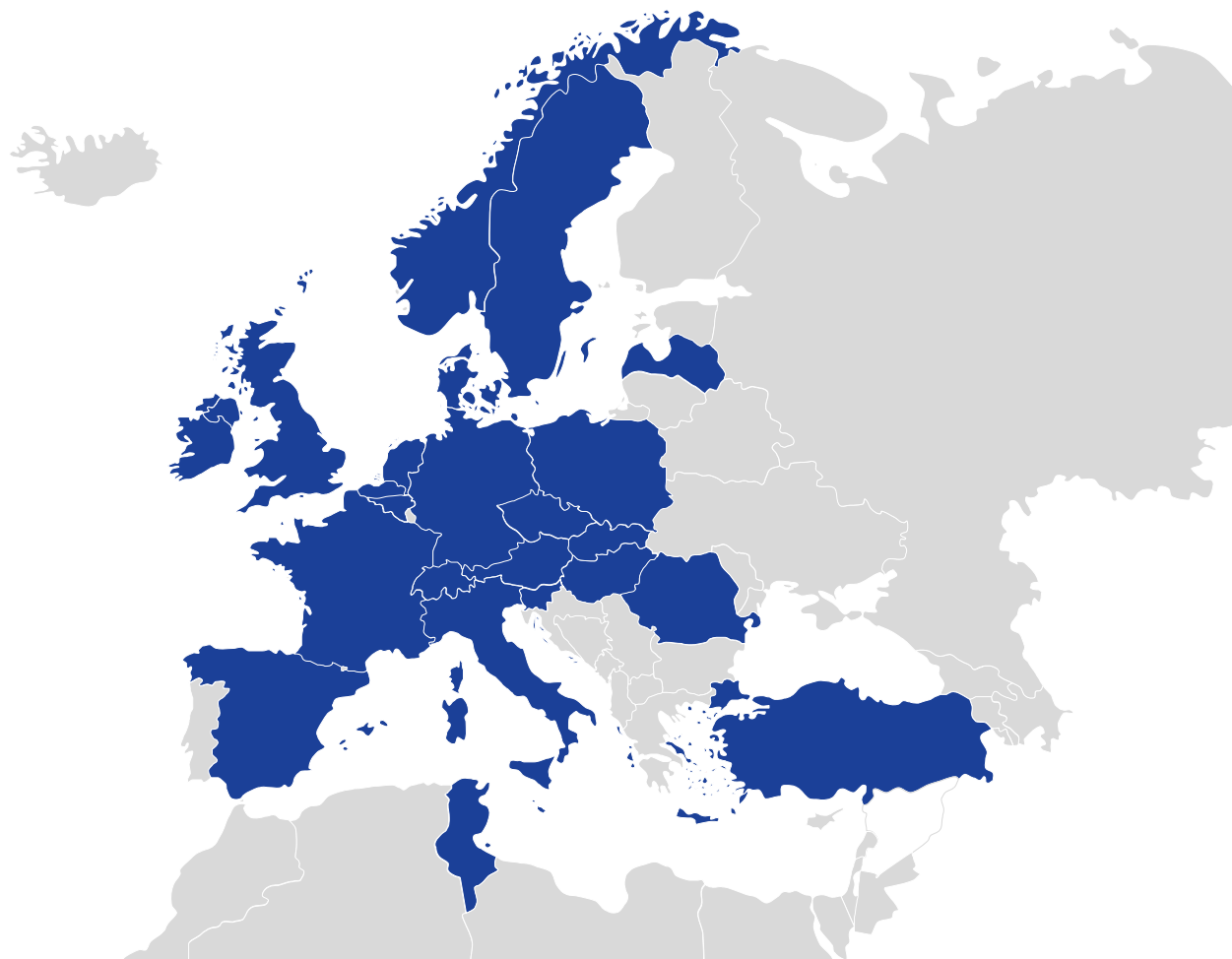


Source: EBU Media Intelligence Service

DIGITAL RADIO ACROSS THE EBU AREA



2016

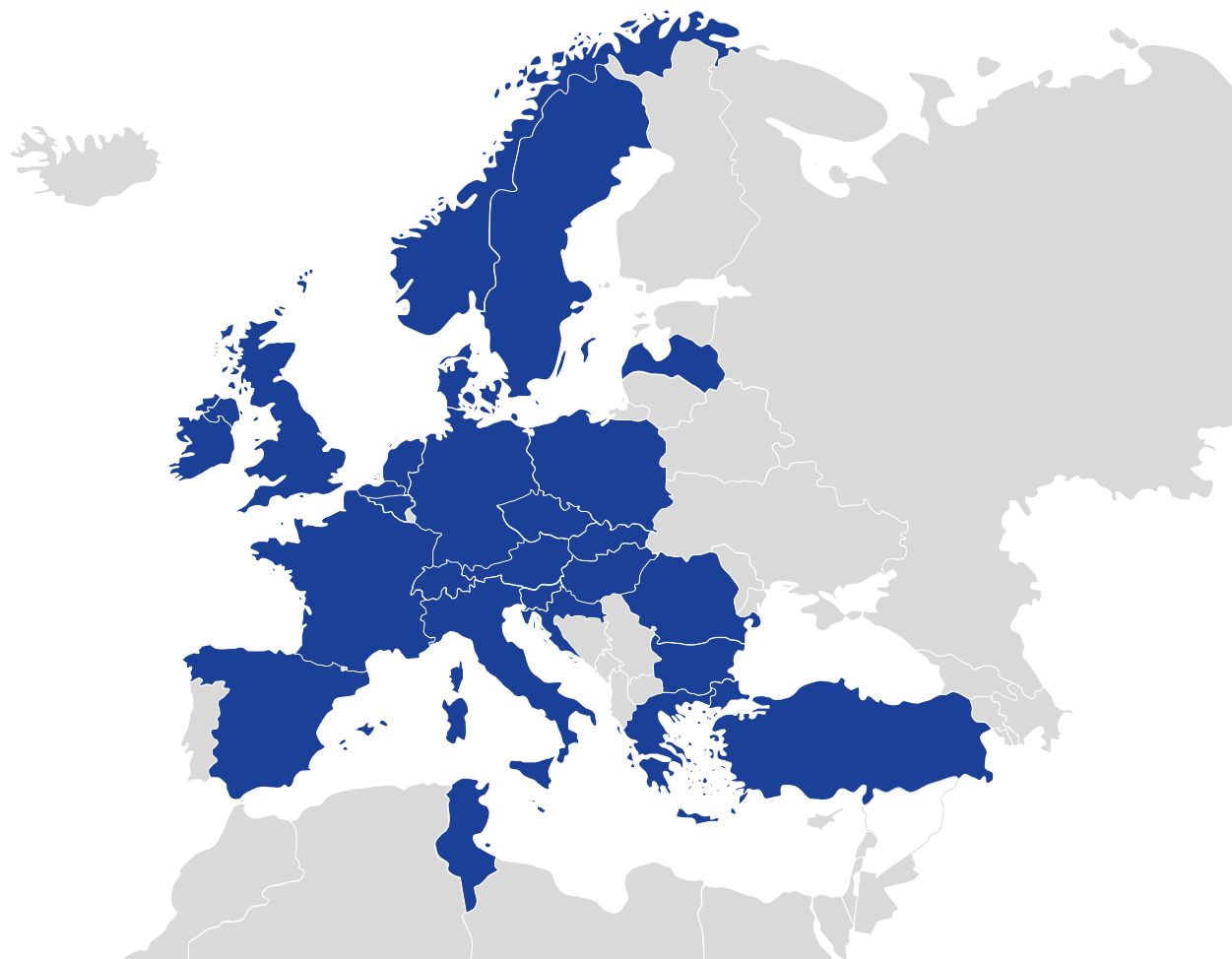


Source: EBU Media Intelligence Service

DIGITAL RADIO ACROSS THE EBU AREA



2017

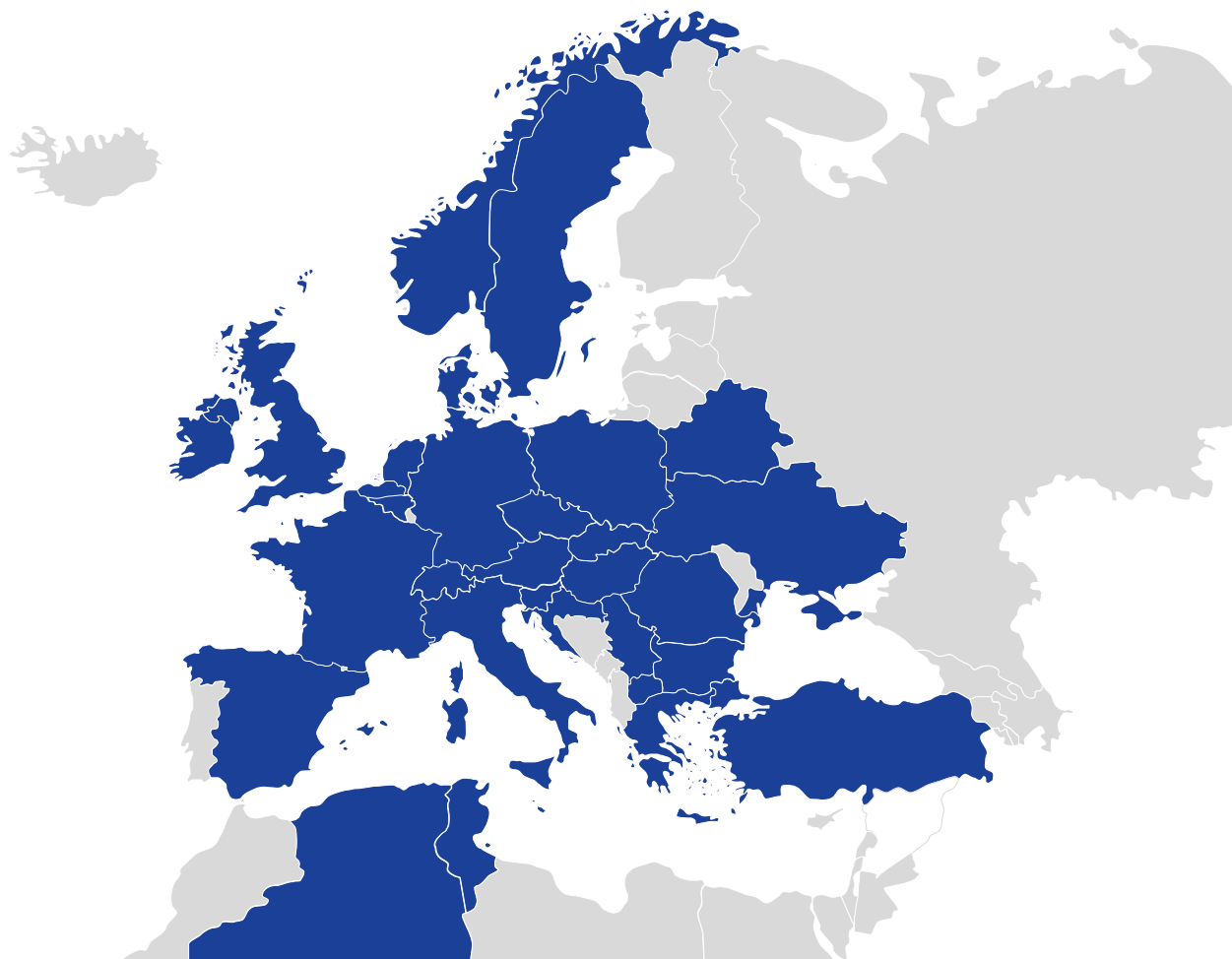


Source: EBU Media Intelligence Service

DIGITAL RADIO ACROSS THE EBU AREA



2019



Source: EBU Media Intelligence Service

DIGITAL RADIO ACROSS THE EBU AREA

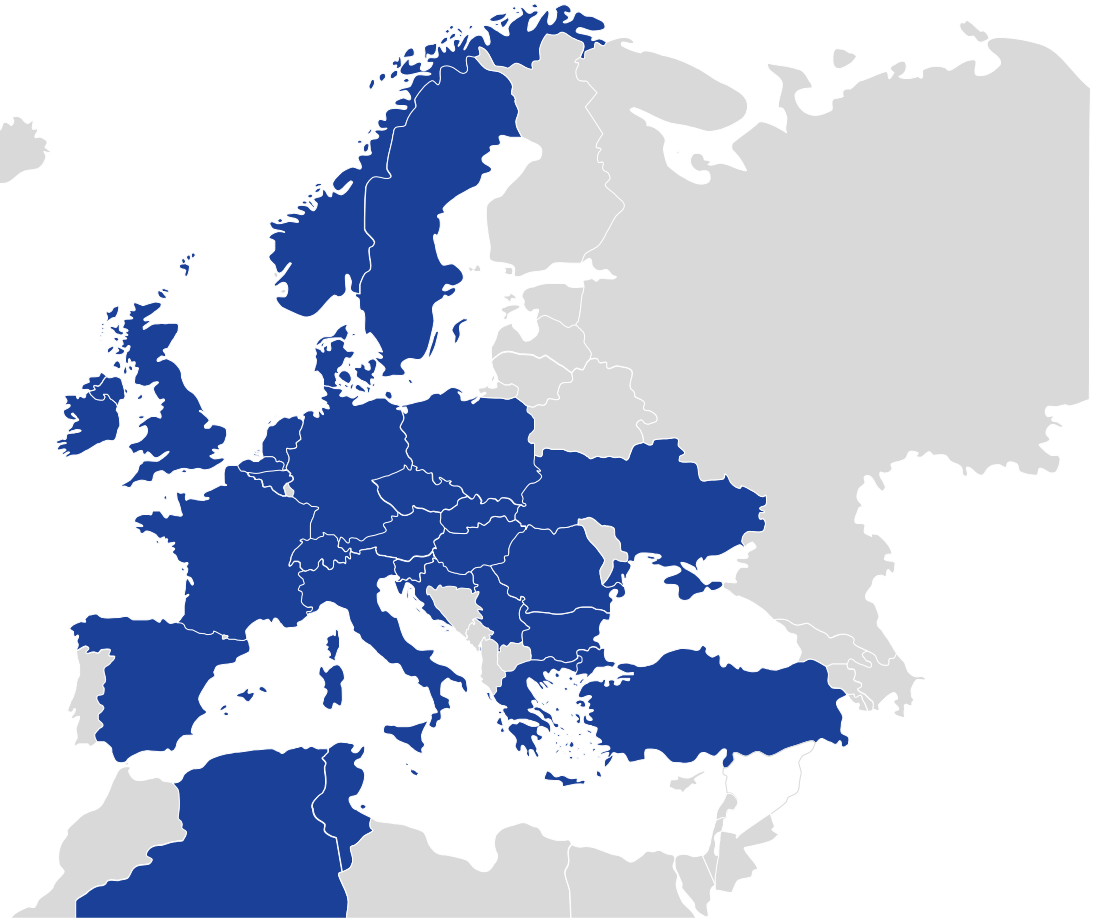
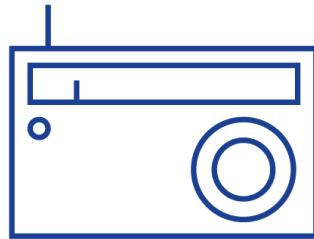


1 566 STATIONS

BROADCAST IN DIGITAL
TERRESTRIAL RADIO ACROSS

31 MARKETS

IN THE EBU AREA

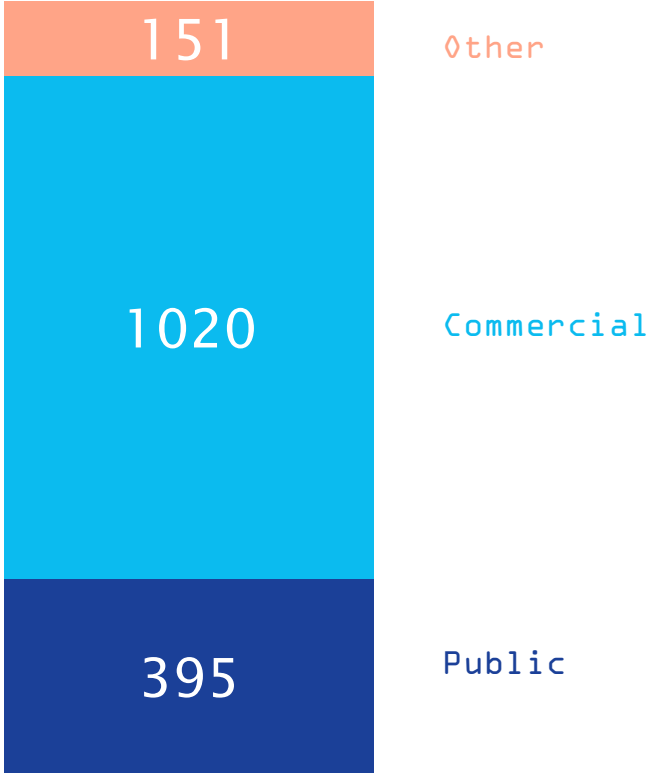


DIGITAL RADIO OWNERSHIP



TWO-THIRDS
OF DIGITAL STATIONS ARE
COMMERCIAL

SERVICES,
WHILE PUBLIC STATIONS REPRESENT
ONE QUARTER OF THE OFFER



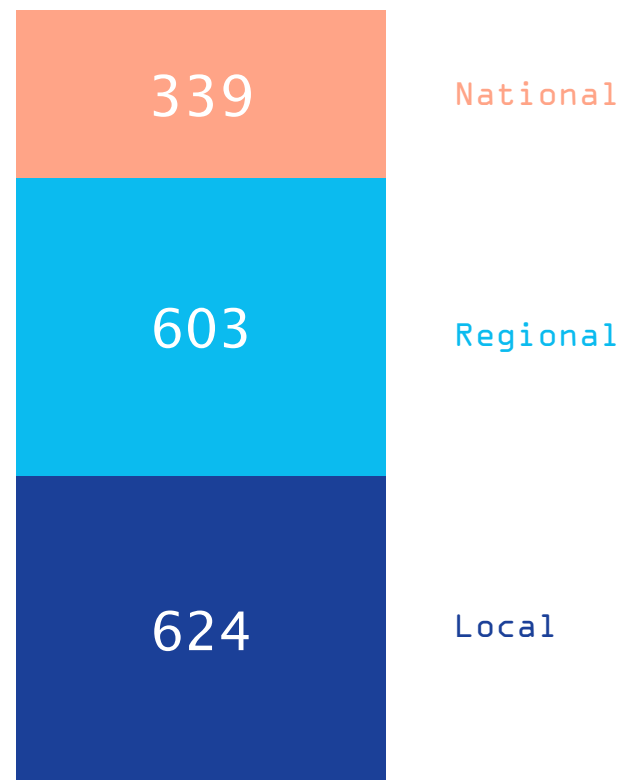
Source: EBU Media Intelligence Service
Media Intelligence Service - Digital Radio 2019

DIGITAL RADIO COVERAGE



MOST
DIGITAL STATIONS
TARGET
LOCAL AREAS

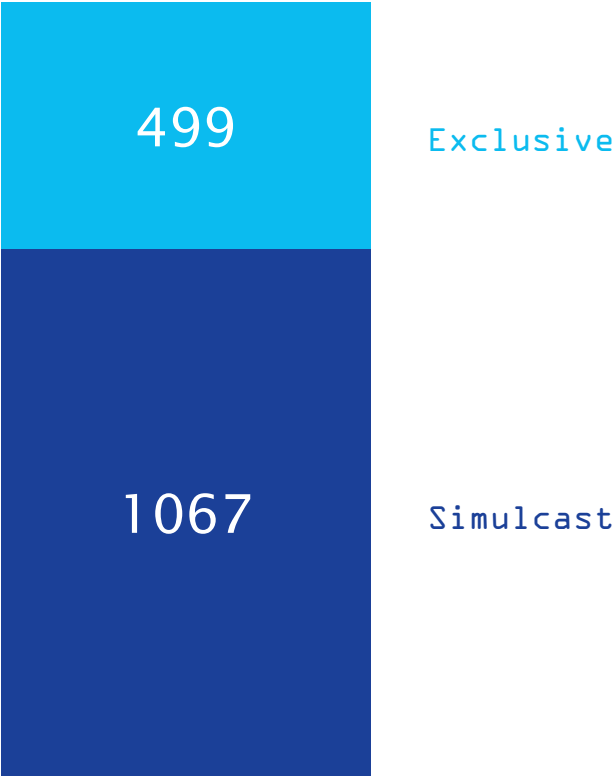
WHILE REGIONAL SERVICES ARE
THE ONES GROWING MORE QUICKLY



DIGITAL RADIO EXCLUSIVITY



ONE THIRD
OF DIGITAL STATIONS ARE
EXCLUSIVE
SERVICES, ADDING VALUE
TO THE ANALOGUE OFFER

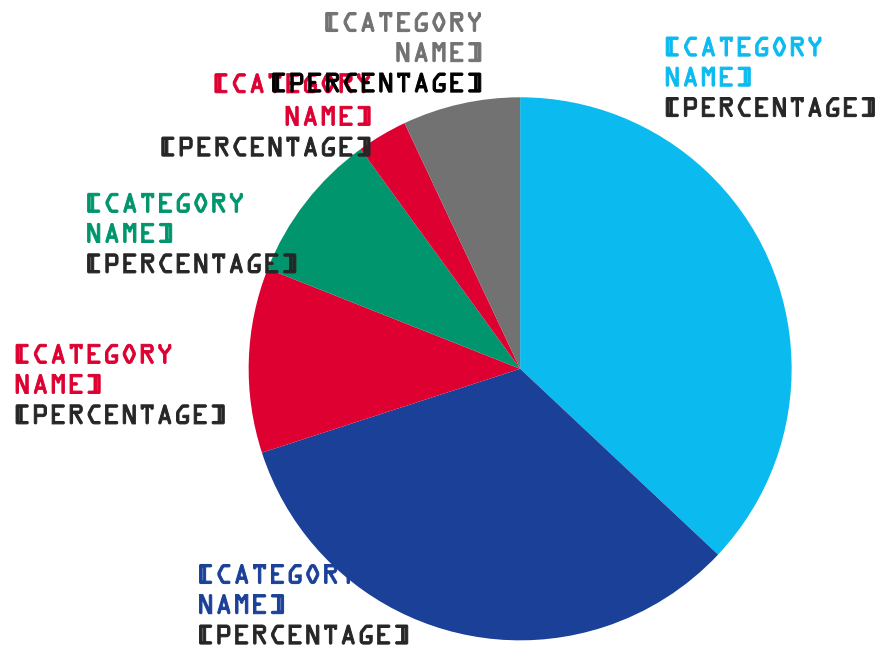


Source: EBU Media Intelligence Service
Media Intelligence Service - Digital Radio 2019

DIGITAL RADIO GENRES: PUBLIC STATIONS



DIGITAL PUBLIC RADIO STATIONS BY GENRE



A GENERAL PURPOSE TO SERVE EVERYBODY

Generalist stations offering a varied mix of genres are the main category of stations for public broadcasters

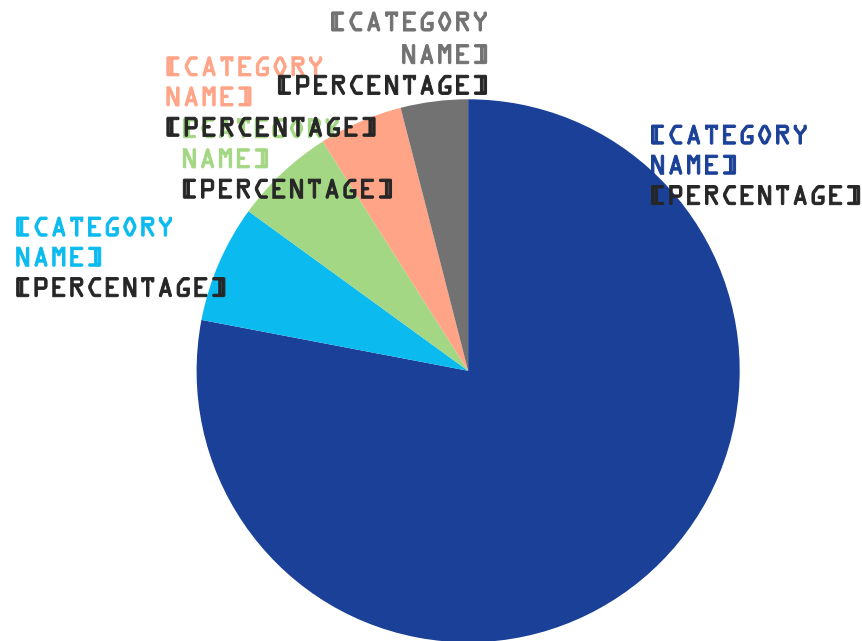
A LONG TAIL OF GENRES

Public stations serve specific purposes: aside from musical genres, there are news & current affairs programmes and cultural and educational stations.

DIGITAL RADIO GENRES: COMMERCIAL STATIONS



DIGITAL COMMERCIAL RADIO STATIONS BY GENRE



HIGH DEPENDENCE ON MUSIC

Commercial radio emphasizes music and digital is no exception. More than 800 commercial music stations are available in DAB / DAB+.

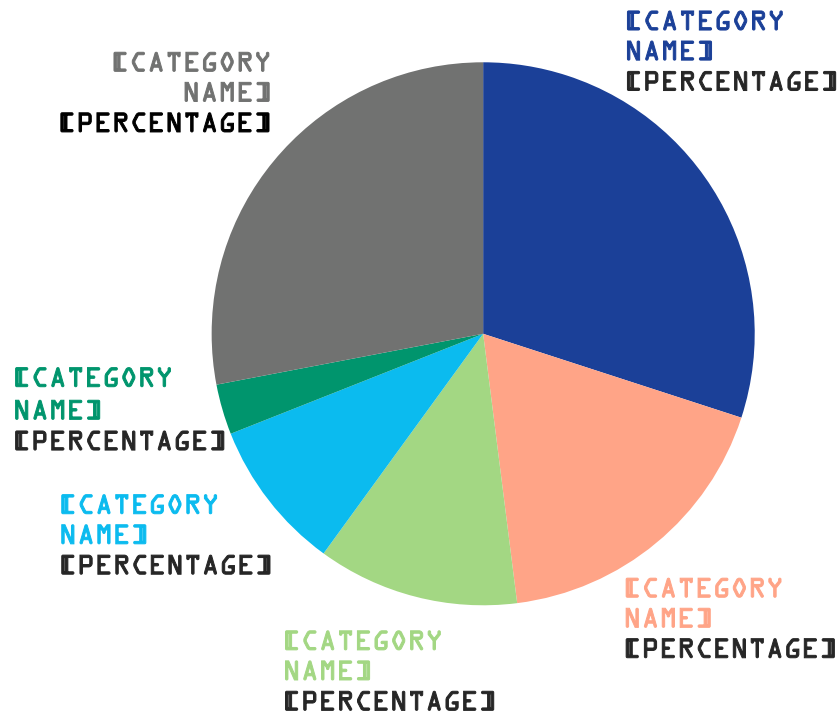
NICHE GENRES EMERGING

There are also programmes targeting specific communities - religious groups are most common.. Broadcasting for minorities is especially popular in the UK.

DIGITAL RADIO GENRES: OTHER STATIONS



DIGITAL OTHER RADIO STATIONS BY GENRE



HIGH VARIETY

Community stations offer a wide variety of genres and/or serve niche communities and social groups. Music is its main genre but with a lower percentage.

European Electronic Communications Code (implemented by 21.12.2020)

Article 113

Interoperability of car radio and consumer radio receivers and consumer digital television equipment

Annex XI

INTEROPERABILITY OF CAR RADIO RECEIVERS...

3) Interoperability for car radio receivers

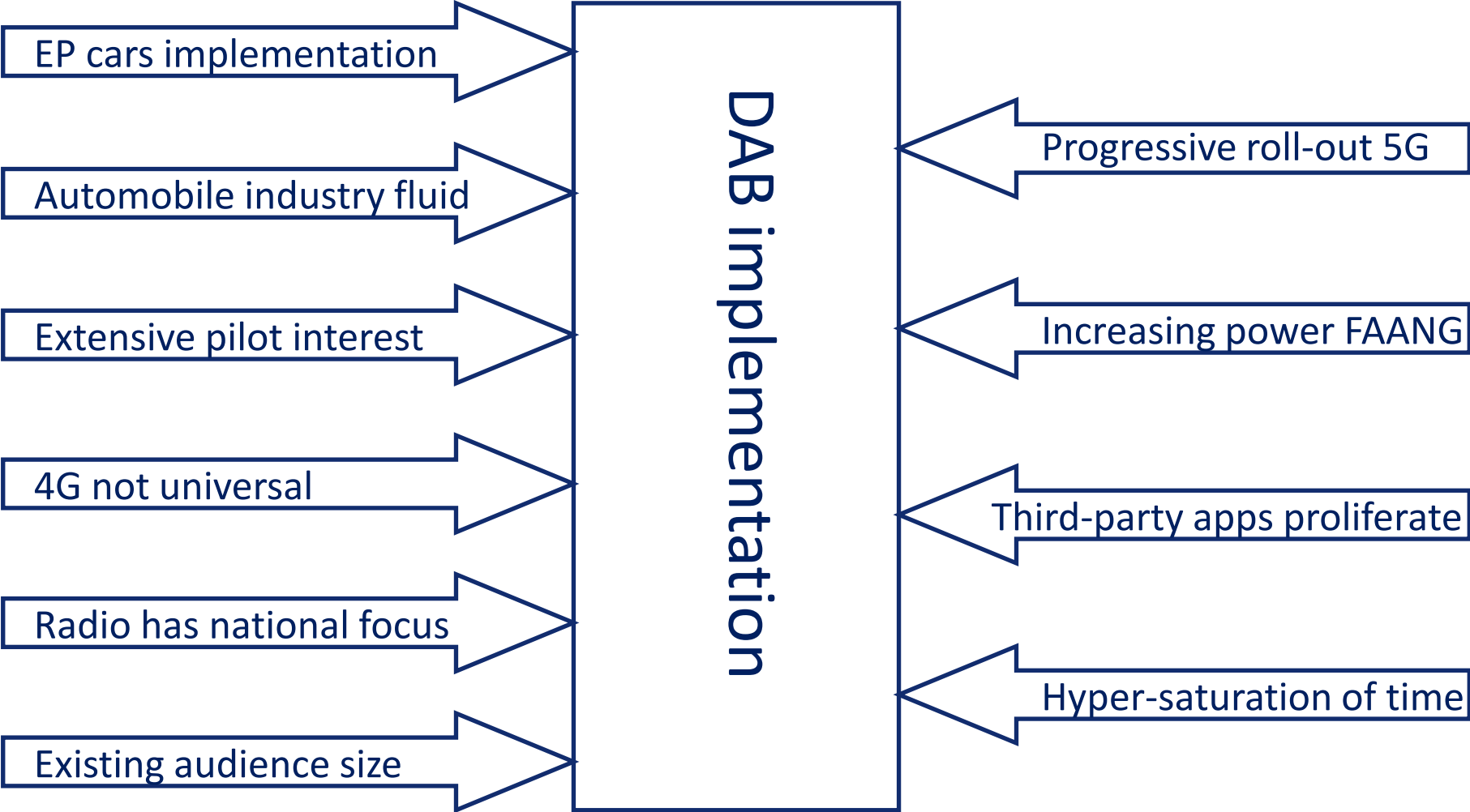
Any car radio receiver integrated in a new vehicle of category M which is made available on the market for sale or rent in the Union from ... [two years after the date of entry into force of this Directive] shall comprise a receiver capable of receiving and reproducing at least radio services provided via digital terrestrial radio broadcasting.

- › Par délibération en date du 19 décembre 2018, le Conseil supérieur de l'audiovisuel a constaté...
- › « V. – Dans un délai de trois mois à compter de la diffusion de services de radio par voie hertzienne terrestre en mode numérique auprès d'au moins 20 % de la population française ... les terminaux neufs dédiés à titre principal à la réception de services de radio et capables d'afficher des contenus multimédias ... permettent la réception des services de radio par voie hertzienne terrestre en mode numérique...
- › Dans un délai de douze mois... cette obligation s'applique à tous les terminaux neufs dédiés à titre principal à la réception de services de radio ainsi qu'aux terminaux neufs permettant la réception de services de radio et capables d'afficher des contenus multimédias...
- › Dans un délai de dix-huit mois... cette obligation s'applique à tous les terminaux permettant la réception de services de radio.

- › Al fine di favorire l'innovazione tecnologica, a decorrere dal 1° giugno 2019 gli apparecchi atti alla ricezione della radiodiffusione sonora venduti dalle aziende produttrici ai distributori di apparecchiature elettroniche al dettaglio sul territorio nazionale integrano almeno un'interfaccia che consenta all'utente di ricevere i servizi della radio digitale. Per le medesime finalità, a decorrere dal 1° gennaio 2020 gli apparecchi atti alla ricezione della radiodiffusione sonora venduti ai consumatori nel territorio nazionale integrano almeno un'interfaccia che consenta all'utente di ricevere i servizi della radio digitale.

- › Sechstes Gesetz zur Änderung des Telekommunikationsgesetzes (6. TKGÄndG)
- › Der Entwurf dient der Umsetzung des Koalitionsvertrages, in dem sich die Koalitionspartner verständigt haben, die Digitalisierung des Hörfunks durch die Interoperabilität von Radioempfangsgeräten zu fördern. Mit der Ergänzung des § 48 TKG soll erreicht werden, dass höherwertige Radioempfangsgeräte nur noch gehandelt werden dürfen, wenn diese zum Empfang normgerechter digitaler Signale geeignet sind (beispielsweise DAB+ oder Internetradio).

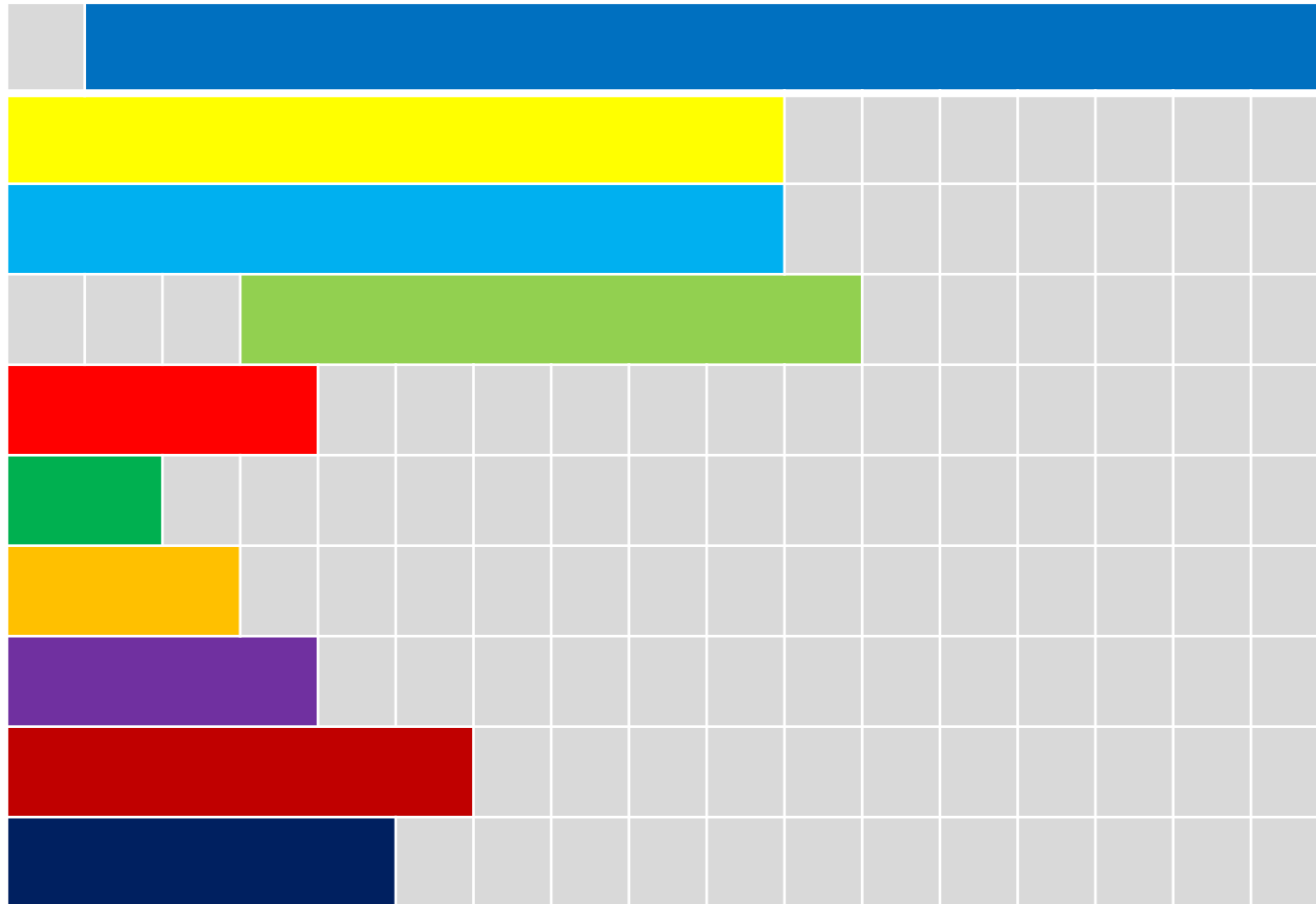
DAB FORCE FIELD



TIMELINE



2020  2035



Progressive roll-out 5G
Increasing power FAANG
Third-party apps proliferate
Hyper-saturation of time

EP cars implementation
Automobile industry fluid
Extensive pilot interest
4G not universal
Radio has national focus
Existing audience size

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