

Case Study: DAB In The UK

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UK radio industry is in good health and thriving

- Record levels of listening
- Unprecedented choice of stations
- Robust revenue for commercial stations



Radio is as popular as ever in the UK



90% of population
tune in every week

Digital drives new 'golden age of radio'

FINANCIAL TIMES

Media, Broadcasting

Digital technology drives new
'golden age of radio'

MailOnline

The end of FM radio: 'New golden age' of digital broadcasting could see the traditional signal scrapped this year

Which?

Audio

Digital radio listening in the UK hits record high

| Could the latest surge in internet and DAB radio listeners spell the end of FM?

digitalradio 

UK digital radio development

Expansion of digital networks

- Funded jointly by Government, BBC and commercial multiplexes

Licensing

- Media regulator Ofcom required dual transmission

Collaboration

- BBC, commercial broadcasters, supply chain and vehicle manufacturers

New commercial network

- Government and Ofcom authorised launch of new national network

Clear Policy

- Government established switchover criteria



Progress has accelerated in the last 5 years

Listening via digital platforms



70% of listeners
do so digitally

Digital listening to all platforms



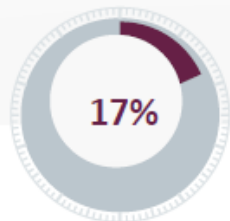
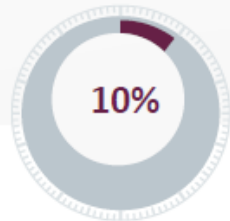
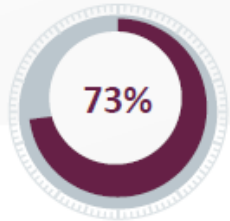
49.9%

Digital listening in UK is to multiple platforms:

DAB

DTV

Online/Apps



At home and work listening combined



55%
digital

digitalradio 

Source: Rajar Q4 2017

In-car digital listening is lower but faster growing

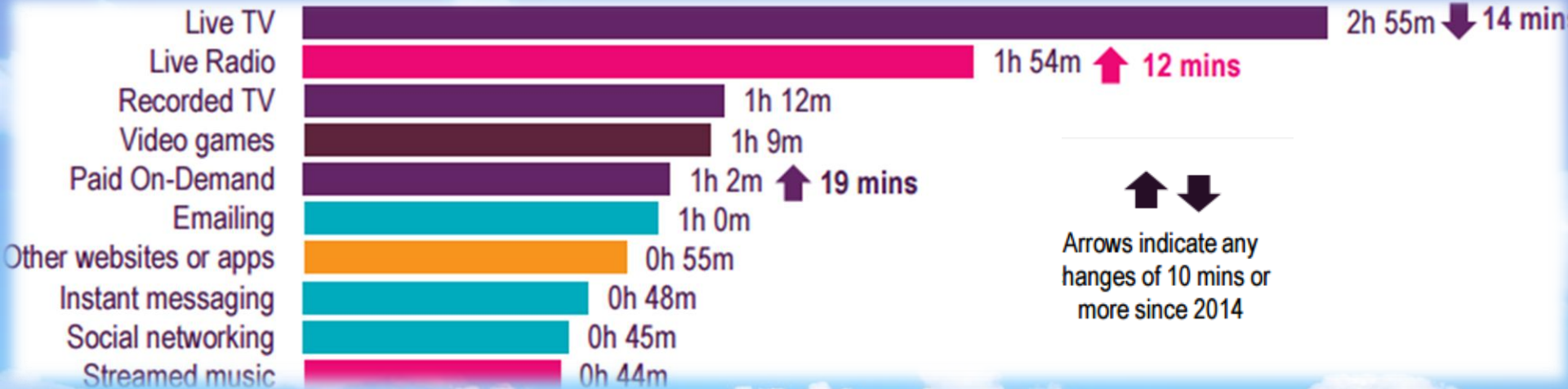


32%

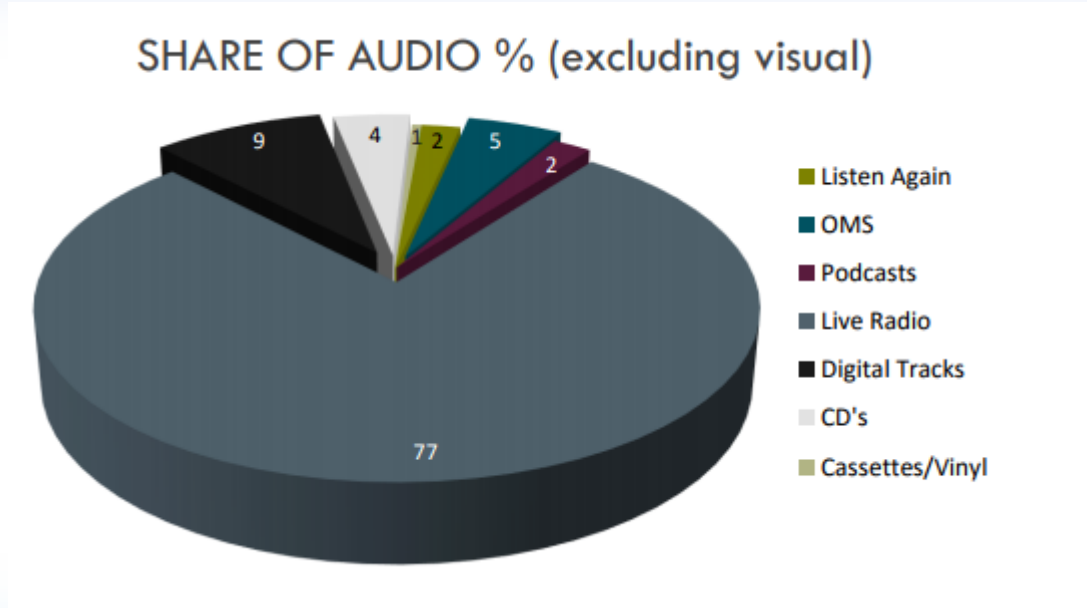
Source: Rajar Q4 2017



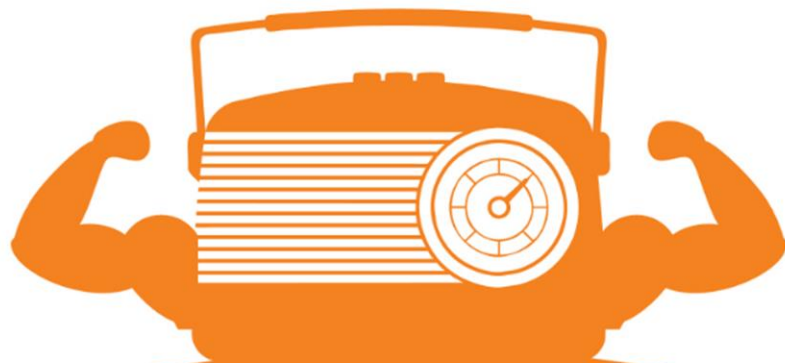
UK radio is prospering in fragmented digital world



UK “Share of Ear” % - Live radio highly relevant



Commercial revenues are robust



£ 646 M

Annual commercial
radio revenue

digitalradio 

The three 'C' s

COVERAGE

CONTENT

CARS



Government/Ofcom managed plan for DAB expansion



Coordinated expansion of national and local coverage



450 digital radio transmitters in last 3 years



**Population coverage increased to match FM
97% national and 91% local by end of 2016**



UK road coverage network boosted



**New national DAB commercial network in
March 2016**

New cars

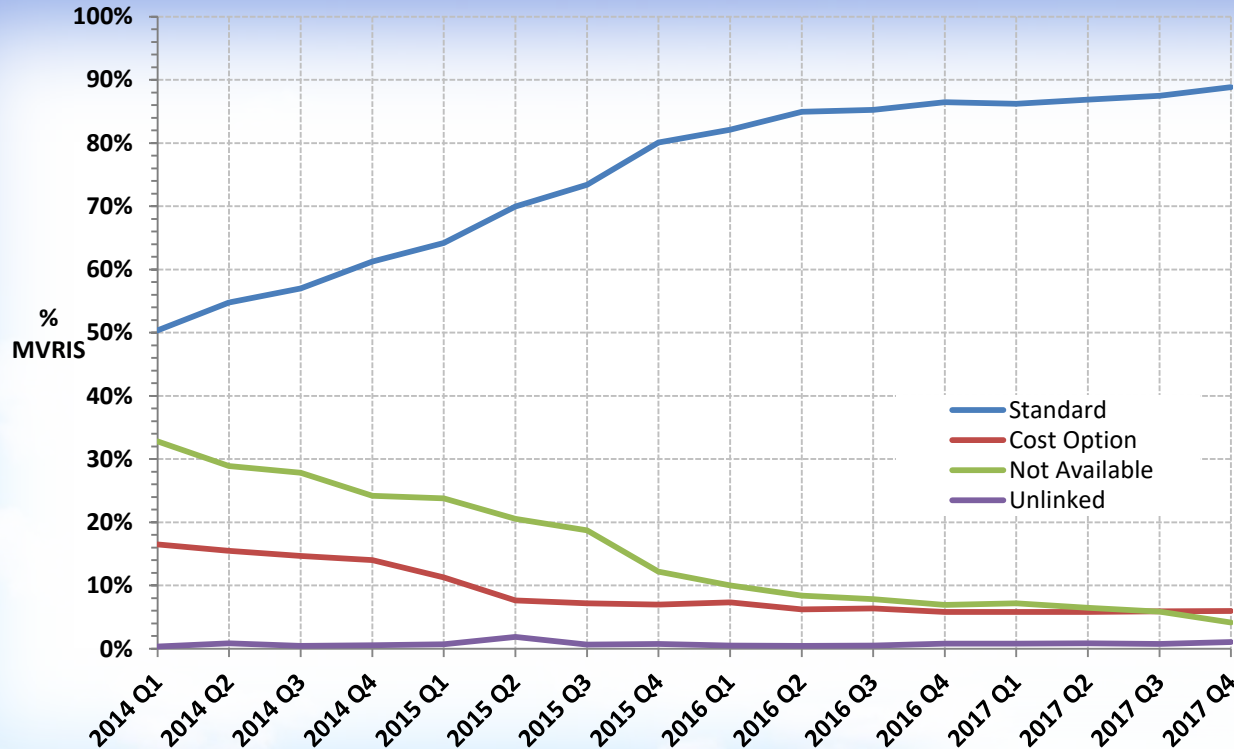
89%



digitalradio 

Source: CAP/SMMT Q4 2017

DAB now standard in 89% of new cars



Source: CAP/SMMT Q4 2017

BBC National radio network



Digital One commercial network



DANCE. URBAN. UK



YOUR REFRESHING MUSIC MIX



Sound Digital commercial network

Magic
Chilled

Mellow
Magic

PLANET ROCK
WHERE ROCK LIVES

Virgin
RADIO
UK

Jazz FM

Absolute Radio **80s**

talkSPORT 2

talkRADIO

Fun Kids

UCB 2

UNION JACK

SUNRISE RADIO
WWW.SUNRISERADIO.COM

PANJAB RADIO
1584 AM
SKY CHANNEL 0130 - DAB Digital-Radio
www.panjabradio.co.uk

FORCES
RADIO BFBS

Premier.
Praise!
light up your life

KISSTORY

Premier.
ChristianRadio
where faith comes to life

heatradio

digitalradio 

Opportunity to extend brands

Analogue and digital



Digital-only services



Absolute Radio → 90s

Absolute Radio → 80s

Absolute Radio → CLASSIC ROCK

Absolute Radio → 70s

Absolute Radio → 00s

Absolute Radio → 60s

digitalradio

Opportunity to extend brands

Magic

**Absolute
Radio** 

 **KISS**
THE BEAT
OF THE UK

Smooth
Radio 97-108
YOUR RELAXING MUSIC MIX

95-106
CAPITAL
FM

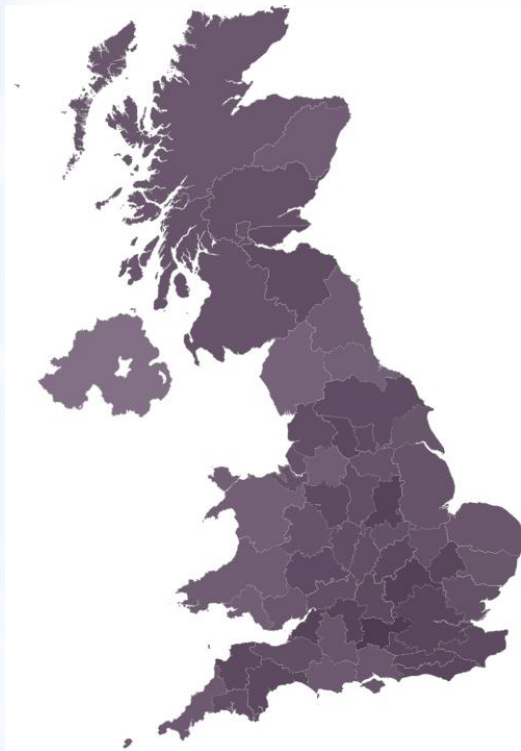
heart
more music variety

talkSPORT 

digitalradio 



UK's local DAB layer



UK's network of local DAB multiplexes



53 local multiplexes across the UK, carrying local BBC and commercial services



Collectively carry over 420 local stations



Individually most cover markets of approx. 250,000 – 3 million people



New transmitters/modifications to 221 sites, boosting local DAB coverage from 72% to more than 90% of UK households



Additional 10 million listeners and 4,000 miles of roads brought into coverage

Ofcom Small-small scale DAB trials



Department
for Culture
Media & Sport

10 trial markets launched in 2015

- Pioneering a new, highly cost-effective means of broadcasting DAB in small geographical locations in England and Scotland

Great success and extended until 2020

- Ofcom concluded trials had been 'highly successful'
- Ofcom and Government now developing a new, formal framework for licensing small-scale DAB multiplexes across the UK

Over 150 services on air

- 60% commercial, 40% community. Unprecedented innovation and diversity

Creates a viable route to DAB for small and community stations

- Potentially allow hundreds more small and start-up stations to broadcast on DAB

AngelRadio



Small-Scale DAB trials



Portsmouth

Aldershot



cdn x



revolution96.2



Rainbow Radio

1 BRIGHTON FM



DAB in the UK: A Case Study



- UK radio's future is digital
- Increased creativity & competition
- Growth of commercial radio
- Real benefits for audiences