

Drive to Digital NOW

#drivetodigital

UK Car Market

Mike Hawes

CEO, SMMT

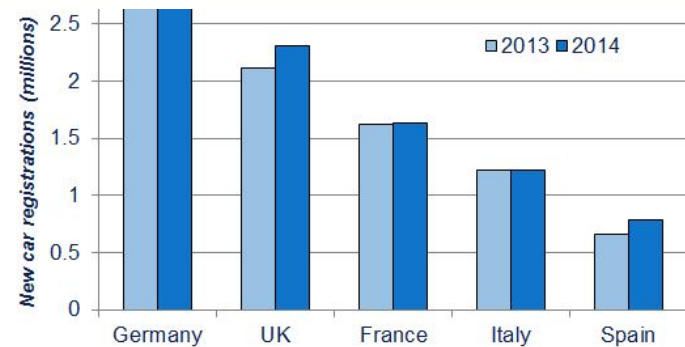
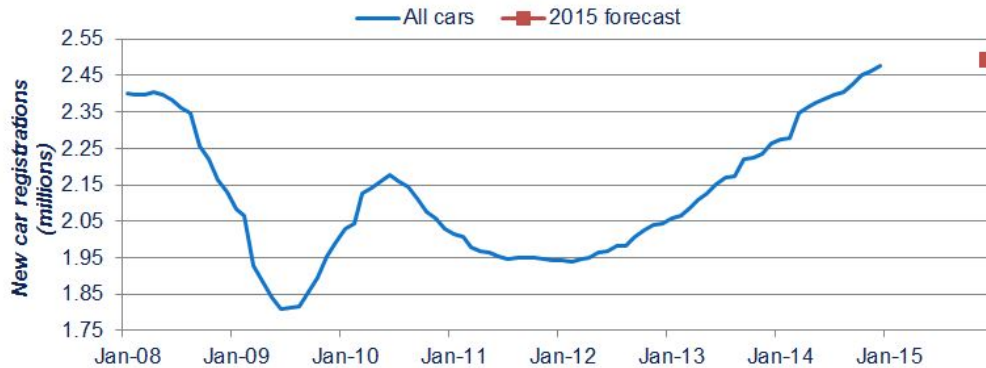
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Drive to Digital

NOW 

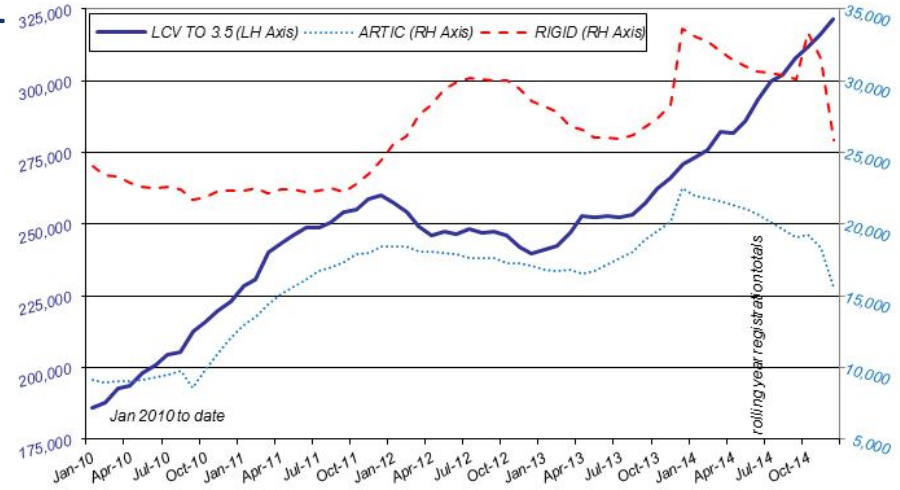
New car registrations are going from strength to strength

- UK registrations finished 2014 on a ten-year high
- It was the third highest year on record



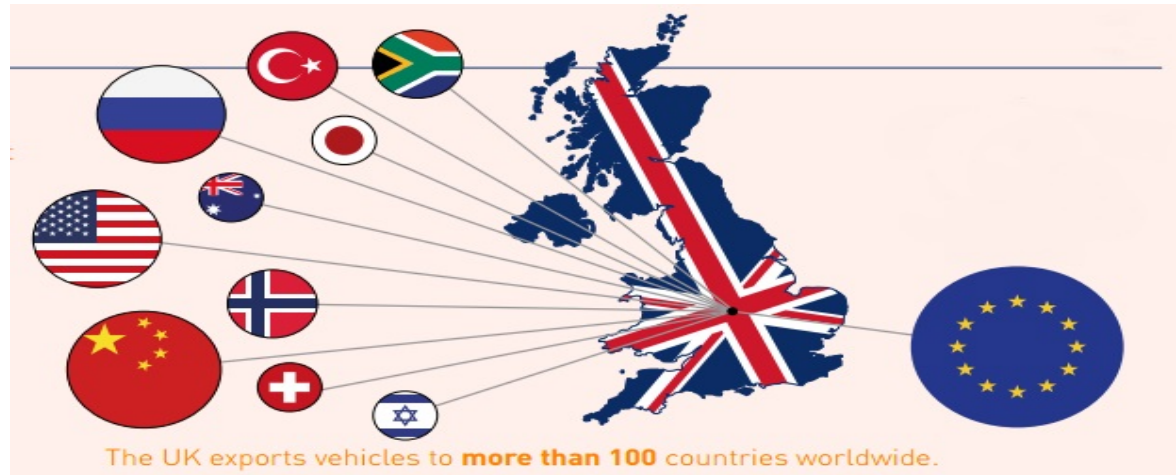
Commercial vehicle registrations are also riding high

- Vans are driving a return to pre-recession registration levels for commercial vehicles



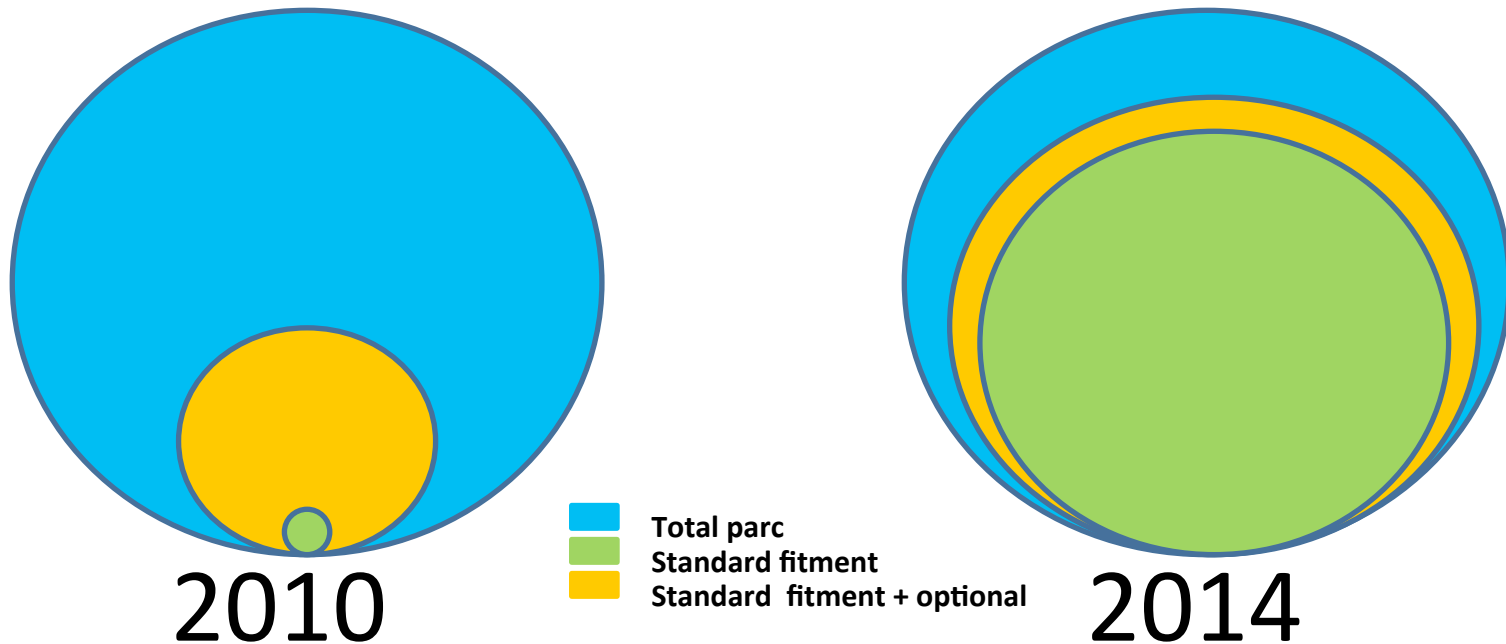
UK manufacturing plants are also busy

- The best year for UK manufacturing plants since 2007
- Growth comes despite challenges in some export markets but as Vince Cable said, “From Sunderland to Goodwood, Britain is turning out cars that are in demand all around the world.”



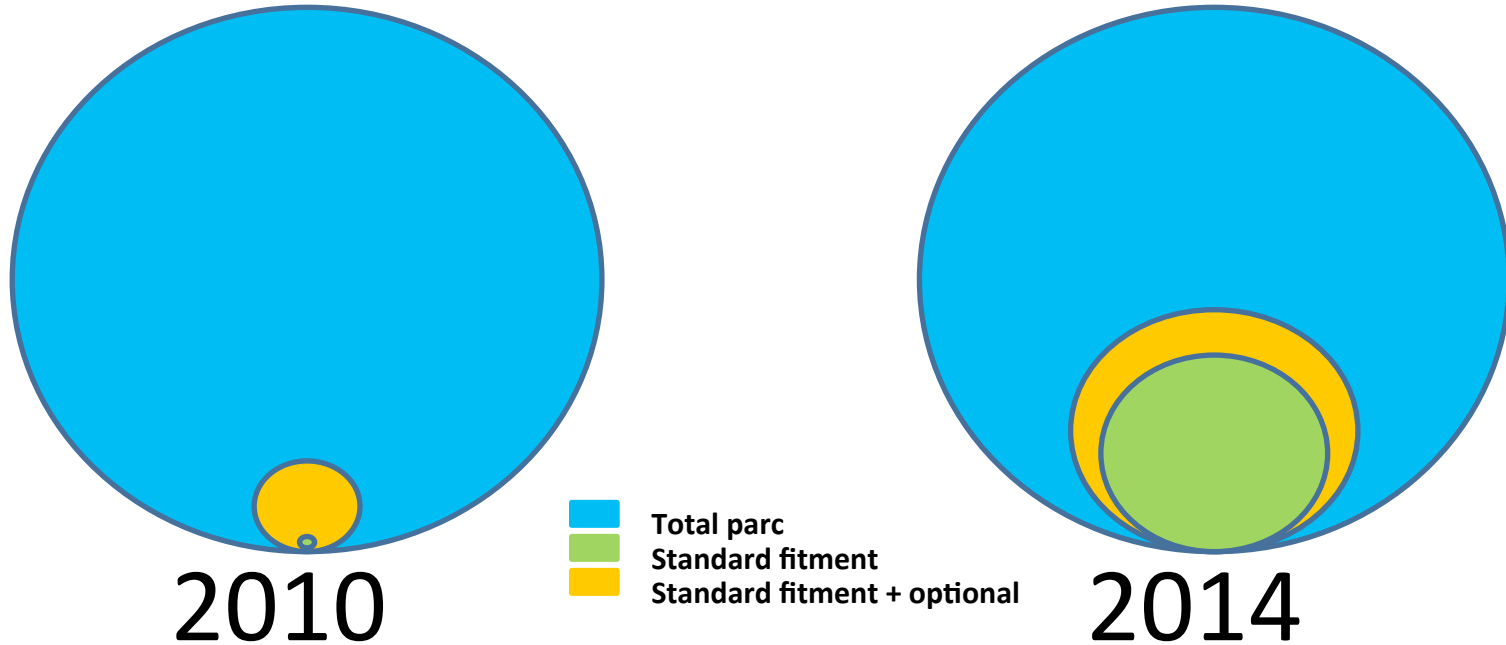
And the industry has worked hard to support Digital Radio

- Standard fitment and general availability has increased significantly in the new car market over the past four years



Significant gains in light commercial vehicles

- Recent strides in 2014 have pushed LCV digital radio availability to nearly a third of the market



SMMT continues to support industry and DRUK

- Congratulations to Volkswagen for becoming the first brand to gain the DRUK Tick Mark



Conversion opportunity for the aftermarket is huge

- Just over 10% of the vehicle parc receives digital radio, leaving more than 30,000,000 vehicles ripe for conversion
- Product, retailers, converters and the Tick Mark are ready to go



We need to work together towards a connected society

- **#SMMTConnected** brings together government and stakeholders to discuss connected and autonomous vehicles
- Delighted to have Ed Vaizey as a keynote
- And to host a joint DCMS/SMMT Digital Dashboard Summit
- Thursday March 26 at QE2 Conference Centre, Westminster



Connected vehicles and
autonomous driving conference

#SMMTConnected 

QEII Conference Centre, London
26 March 2015

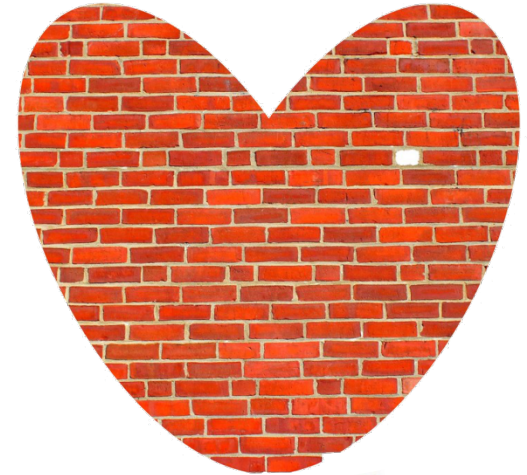
Digital radio and cars are a match made in heaven

- Cars account for a quarter of all broadcast radio listening
- So digital radio in car makes a huge amount of sense
- We believe it would take just one journey in a digital car to convince analogue listeners to upgrade and change their tunes



The building blocks for a switchover are in place

- Broad support of digital radio by government is welcomed
- The market is ready to make the move to digital
- A clear and concrete commitment to a switchover is needed
- Our thanks to Ed Vaizey for all of his support so far



SMMT
DRIVING THE
MOTOR INDUSTRY



Thank you

DAB Coverage Expansion

Steve Holebrook

MD Broadcast, Arqiva

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Drive to Digital

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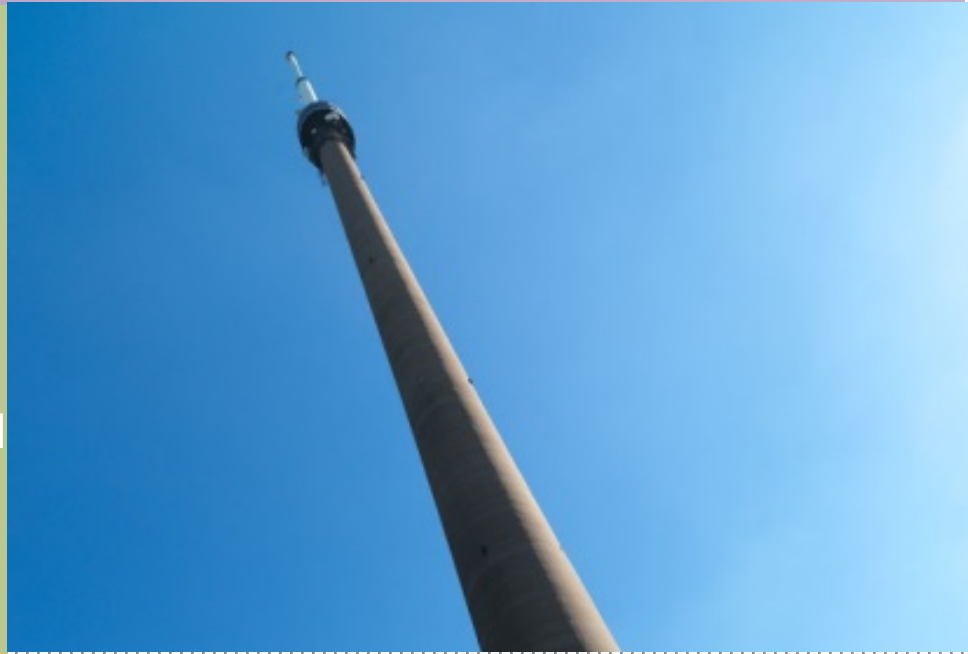
An aerial photograph of London at sunset, featuring prominent skyscrapers like The Shard and The Gherkin. A large red triangle is overlaid on the left side of the image, containing the Arqiva logo and tagline. The background shows a dense urban landscape under a golden sky with scattered clouds.

arqiva

Creating the future of
communications and
broadcast together
Always

DAB rollout – what's been done in the last 12 months

- Built out or extended six local multiplexes
 - Derbyshire
 - North West Wales
 - Somerset
 - North Yorkshire
 - Devon and Herts/Beds/Bucks
 - 2 million new local listeners
- BBC expansion 50% complete – improved reception for circa 4m households
- Digital One national commercial coverage improved in five areas



6 new/extended multiplexes



80 new BBC transmitters

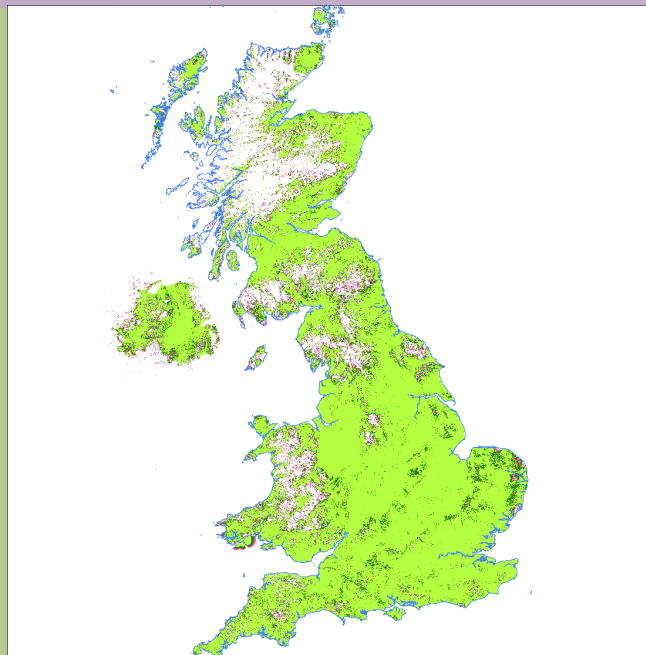


2 m new local DAB listeners

What we're doing in the next 18 months

National DAB

- BBC national network expansion
 - 80+ more DAB transmitters
 - Achieving 97% coverage
- D1 extending national commercial coverage
 - 10 further areas
 - Achieving 91% coverage



97% BBC national
coverage



91% D1 national
coverage



months

- Local DAB
- Building two further local multiplexes
 - **Lincolnshire & Suffolk**
- Improving listener experience
 - **Service linking now live in SE England across seven local multiplex areas – launched this week with 11 services including Capital, Heart and XFM**
- More coverage

Expanding and extending local DAB

- Improve local DAB coverage to match local commercial analogue radio coverage
- Provide a “switchover-ready” listening experience



232 new or modified transmitters



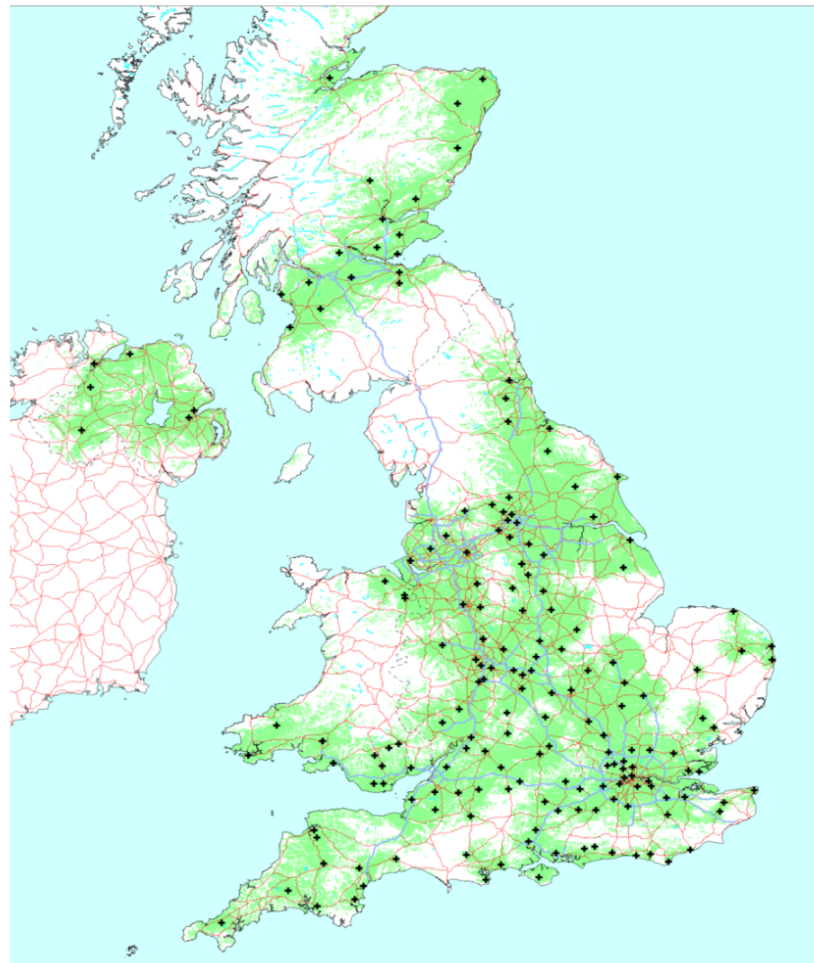
8 million new listeners



6,700km new road coverage



91% local DAB coverage



Expanding and extending local DAB

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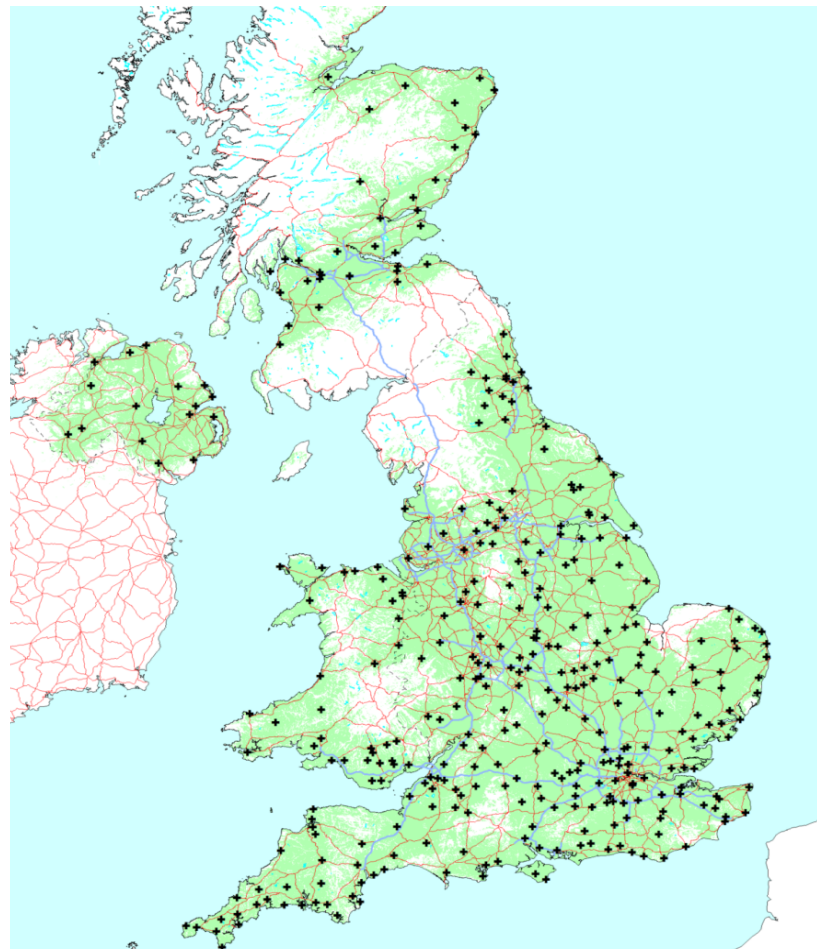
8 million new listeners



6,700km new road coverage



91% local DAB coverage



Second National DAB Multiplex



Sound Digital consortium

Uniting Bauer and UTV Media, two of the UK's leading music and speech broadcasters, with Arqiva, the UK's leader in broadcast transmission, to deliver a step-change in choice for radio listeners

New national network

New network focusing on the requirements of digital-only stations balancing cost-effectiveness with high quality national coverage

Aimed at homes and motorists

Planned to provide coverage of 88% of vehicles on the move 

Available to 46m listeners

Dee Ford

Group MD Radio, Bauer Media

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Drive to Digital

NOW 



MEDIA GROUP

DEE FORD
GROUP MANAGING DIRECTOR, RADIO

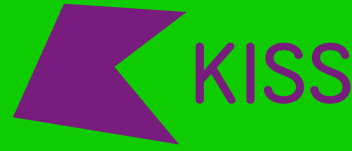
BIG BRAND NETWORKS



LOCAL



NATIONAL



NATIONAL



NATIONAL

BAUER CITY NETWORK



BAUER CITY NETWORK



25-44

Your Music Your Life
FM/Digital/On-line/Mobile



45+

The Greatest Hits
AM/Digital/On-line/Mobile



15-24

The Hits
Digital/On-line/Mobile

BAUER NATIONAL BRANDS





: 6:59

BAUER: NUMBER 1 IN DIGITAL RADIO

WHAT WE HAVE LEARNT ABOUT DIGITAL AUDIENCES

- **CHOICE**
- **BRANDS**
- **AUDIENCE KNOWLEDGE**
- **POWERFUL CROSS PROMOTION**

IMPORTANCE OF IN-CAR DIGITAL RADIO

- **11,000+** ENTRIES TO WIN A CAR WITH DIGITAL RADIO
- **60%** OF LISTENING EACH WEEK IS IN-CAR
- **51%** OF LISTENING TO BAUER RADIO IS DIGITAL
- **NEW STATIONS BEING LAUNCHED**



MEDIA GROUP



Will Harding

Chief Strategy Officer

Global Radio

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Drive to Digital

NOW 



global
thisisglobal.com



global
RADIO



global
TALENT



global
PUBLISHING



global
TELEVISION



Local DAB 90% coverage by 2016



Digital One – national coverage



CLASSIC *f*M

October 2013



February 2014



December 2014



2015*



More to come...!



global
thisisglobal.com

Thanks
thisisglobal.com

Conversion and Communications

Laurence Harrison

Jane Ostler

Digital Radio UK

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Converting cars

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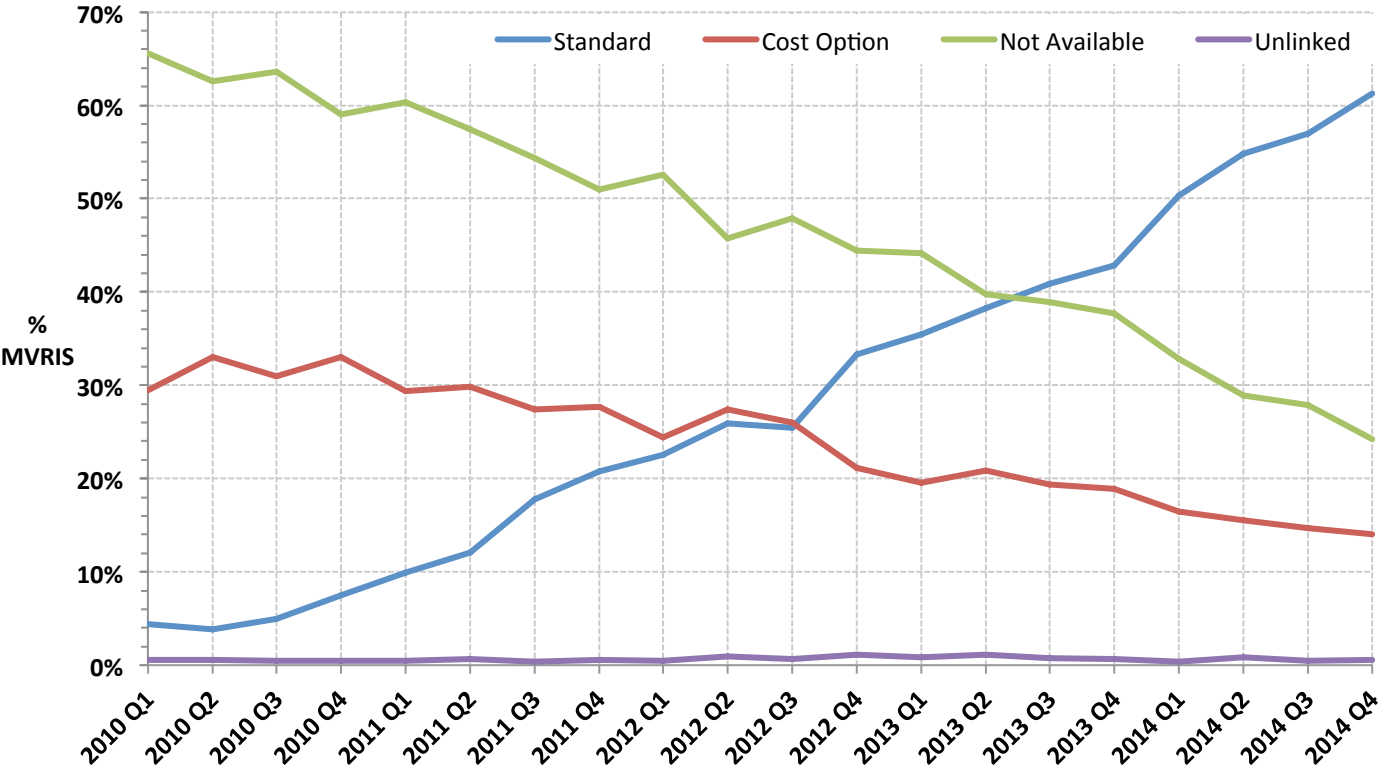
Drive to Digital

NOW 

A strong platform

- 22% of radio listening hours in car
- 49% of homes have digital radio
- 61% of new cars have digital radio

Strong new cars progress: 61.2%





VW dealers digital tick approved



Halfords range digital tick approved



SONY

Pioneer

PURE

KENWOOD

JVC

Car conversion - innovation

radio
player



NOW is the time

- Coverage
- Content
- European market
- Availability
- Communications

Communicating cars

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NOW 

The year of the tick

- New car sales peak in March/Sept
- Spring national tick launch for cars
- Summer 'Let's get digital' car trade-in
- Car radio retailer guides
- DVLA tax reminders
- YouTube videos
- Digital ambassador



Digital ambassador

?

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Drive to Digital

NOW 



Drive to Digital:
NOW ✓

Suzi videos about tick and cars



YouTube



Drive to Digital:
NOW ✓

Digital radio communications: first half

13-27 APR
LOOK FOR THE TICK

1 JUN-3 AUG
LET'S GET DIGITAL

Look for the tick

“Let’s get digital” trade-in

Convert any car

Convert any car

Choice of stations

Choice of stations



40 million DVLA vehicle tax reminders

“If you’re buying a car radio, look for the tick”



Drive to Digital:
NOW 

Launch of digital tick for cars

Halfords launch of digital radio tick

Tick mark POS boards in 400 stores from April



Drive to Digital:
NOW

Digital tick retail guides

Your guide to the digital radio tick mark

digitalradio 



If you love radio, go digital

getdigitalradio.com

What is digital radio?

Why should I buy a digital radio?

Digital radio gives you more content, better functionality, and is easier to use.

Digital radio gives you more:

You can get all the stations you love listening to now plus more stations that are digital only.

Digital radio is easy to use:

With digital radio, there is no need for a dial to change the frequency; you can find your [favourite](#) stations at the touch of a button.

Digital radio is smart:

Some radios have Wi-Fi built in giving you an even wider choice of stations online.



Check which stations you can get at
getdigitalradio.com

digitalradio 

What is the digital radio tick mark?

What does the digital radio tick mark mean?

On a radio set: A radio with the digital radio tick mark is an approved product which is future-ready; it has FM, DAB, and DAB+, which is a technology standard being adopted across Europe. Having the tick mark also means that the radio is designed to receive the stations that you're predicted to get at your address.



For an installer: A digital radio installer with the tick mark has successfully passed an industry training programme and is a registered in-car digital radio installer.



Find approved radios and installers at
getdigitalradio.com

digitalradio 

Digital radio coverage

There has never been a better time to get a digital radio. Transmitters are being switched on all over the UK, meaning signal improvements for millions of listeners. Check which stations you can get at getdigitalradio.com

Wherever you are:

- You can listen on a digital radio set.
- You can listen online, on your [smartphone](#), or tablet and on your TV.
- All cars can be converted to digital radio. Ask your car dealer or car radio retailer about a digital radio car adaptor.



If you love radio, go digital
getdigitalradio.com

digitalradio 



Digital radio communications: second half

SEPT

New cars

Convert any car

Station choice

NOV/DEC

Xmas gifting

Convert any car

Look for the tick



Summary



Scott Taunton
Steve Holebrook
Dee Ford

Sound Digital

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Drive to Digital

NOW 

Sound Digital

#sounddigital



Matt Deegan

Paul Firth

Listen2Digital

#drivetodigital

Drive to Digital

NOW 

Listen2Digital

Matt Deegan
Fun Kids

Paul Firth
Babcock International

JAZZ

Premier.
Gospel
Music for life

Premier.
ChristianRadio
where faith comes to life

SPORTS RADIO

★ gem
what a feeling

FunKids

SABRAS RADIO

THE WIRELESS
FROM AGE UK

CHRIS COUNTRY RADIO

Listen2Digital

MODERN ROCK

FOOD

GAYDIO

POP

RTÉ RADIO 1

3000 8 8 107 2010
nation radio

UPLOAD RADIO

share radio
sharing ideas about money

PANJAB RADIO

Listen2Digital

Fun Kids - the children's radio station

www.funkidslive.com

Admin RT Sites Staging DAB VDL PrefHolis Red U Upload Other Bookmarks

Funkids We're the UK's children's radio station!

Click here to listen!

HOME LISTEN SHOWS WIN VIDEO GAMES FEATURES EVENTS PARENTS CONTACT Search the archive...

TAKE THAT Watch music video for new spy film! **CLICK HERE**

ON AIR The Club with Bex playing George Ezra - Listen To The Man **LISTEN**

POLSKA It's back! Kłórej družnie. Tune in from 6pm to 10pm

Sunda Fun Hear Young Voices

Mrs Doubtfire is becoming a musical! Club Penguin taken over by evil Empire! Six year old superhero meets Bruno Mars! Meghan Trainor and Harry Styles duet!

FunkidsRadio

We're the UK's children's radio station! Listen to Fun Kids at funkidslive.com!

FUN Kids RADIO

VERIFIED

Feed Discover Alerts Me

Funkids DIGITAL RADIO AND ONLINE

Have you subscribed to all of our free podcasts?

What's New Featured

YouTube Zoella YouTube Zoella YouTube Zoella YouTube Zoella YouTube Zoella

Fun Kids meets Zoella!

Feed Discover Alerts Me

BAAFTA Children's Awards 2014!

Funkids digital radio and online

Interview with Stereo Kicks! #StereoKicksOnFunkids

ON NOW!

Tune in to Fun Kids now to hear it! Listen at FunKidsLive.com

Breakfast with Sean 6:30AM

Fun Kids Junior with Charlotte 9AM

Fun Kids Junior with Alex 10PM

The Club with Bex 7PM

Cute chick and cat are unlikely friends! Watch cute kitten play peek a boot!

Download the new BeBeebies Magazine App!

Listen Live on Digital Radio in London here or online at funkidslive.com

NEWS SHOUTS WEBSITE WIN

Professor of the Day

Fun Kids Junior with Alex

Fun Kids Radio studio with a dog mascot

Fun Kids Radio event at a fair

Fun Kids Radio team photo

Funkids DIGITAL RADIO AND ONLINE

Fun Kids Radio mobile app

Fun Kids Radio mascot

ON AIR

Funkids DIGITAL RADIO AND ONLINE

Listen2Digital

JAZZ

Premier.
Gospel
Music for life

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SPORTS RADIO

★ gem
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POP

RTÉ
RADIO 1

3000 8 8 107 2010
nation
radio

UPLOAD
RADIO

shareradio
sharing ideas about money

PANJAB
RADIO

Listen2Digital

“We have a wide measure of discretion in balancing our statutory duties and objectives... in particular as regards the extent to which we consider that applicants’ commercial incentives are **likely to support competition** in relation to terrestrial digital sound broadcasting.”



orion
— media —



trusted to deliver™



Control over 80% of commercial multiplexes, with shareholdings in all but two.



64% Capacity to Shareholders

Listen2Digital

24% Capacity to Shareholders

Listen2Digital

JAZZ

Premier.
Gospel
Music for life

Premier.
ChristianRadio
where faith comes to life

SPORTS RADIO

★ gem
what a feeling

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3000 8 8 107 2010
nation
radio

UPLOAD
RADIO

shareradio
sharing ideas about money

PANJAB
RADIO

Listen2Digital

★ **gem**
what a feeling

THE
WIRELESS
FROM AGE UK

106.4 & 107.0 FM
nation
radio

POP

MODERN ROCK

FOOD

Premier.
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Funkids

SABRAS  RADIO

JAZZ

SPORTS RADIO

share**radio**
bring ideas about money

PANJAB
RADIO

RTÉ
RADIO 1

GAYDIO

CHRIS
COUNTRY
RADIO

UPLOAD
RADIO



trusted to deliver™

- **42 Transmitter Sites**
- **81.5% of the population**
- **94% Motorway Coverage**
- **69% Primary A Roads**
- **Experienced network management**
- **Launching in Q2/2016**

- **Reach 81.5% of the population**
- **Significant road coverage**
- **New multiplex competition**
- **New transmission competition**
- **Inexpensive for service providers**
- **Wide range of stations, broad range of providers**
- **Stereo and DAB+**
- **New marketing to new audiences**
- **Real new financial support for Digital Radio UK**

Listen**2**Digital

@listen2digital

www.listen2digital.co.uk

Thank you

#drivetodigital

Drive to Digital

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