

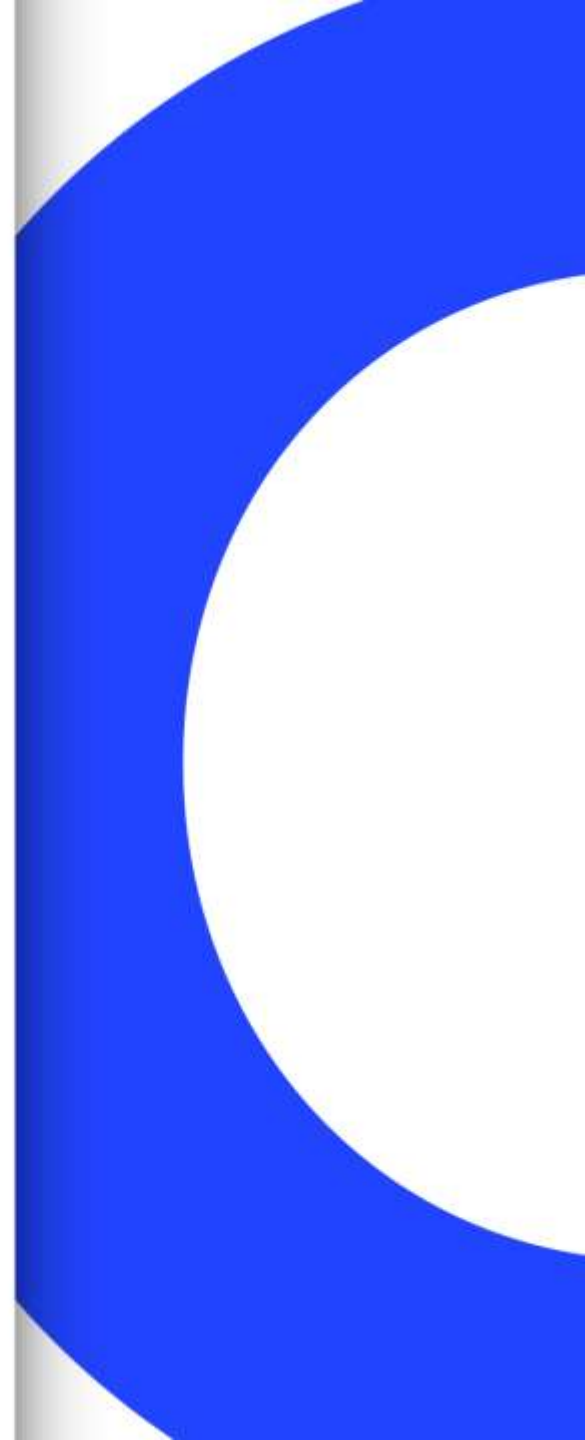
EBU

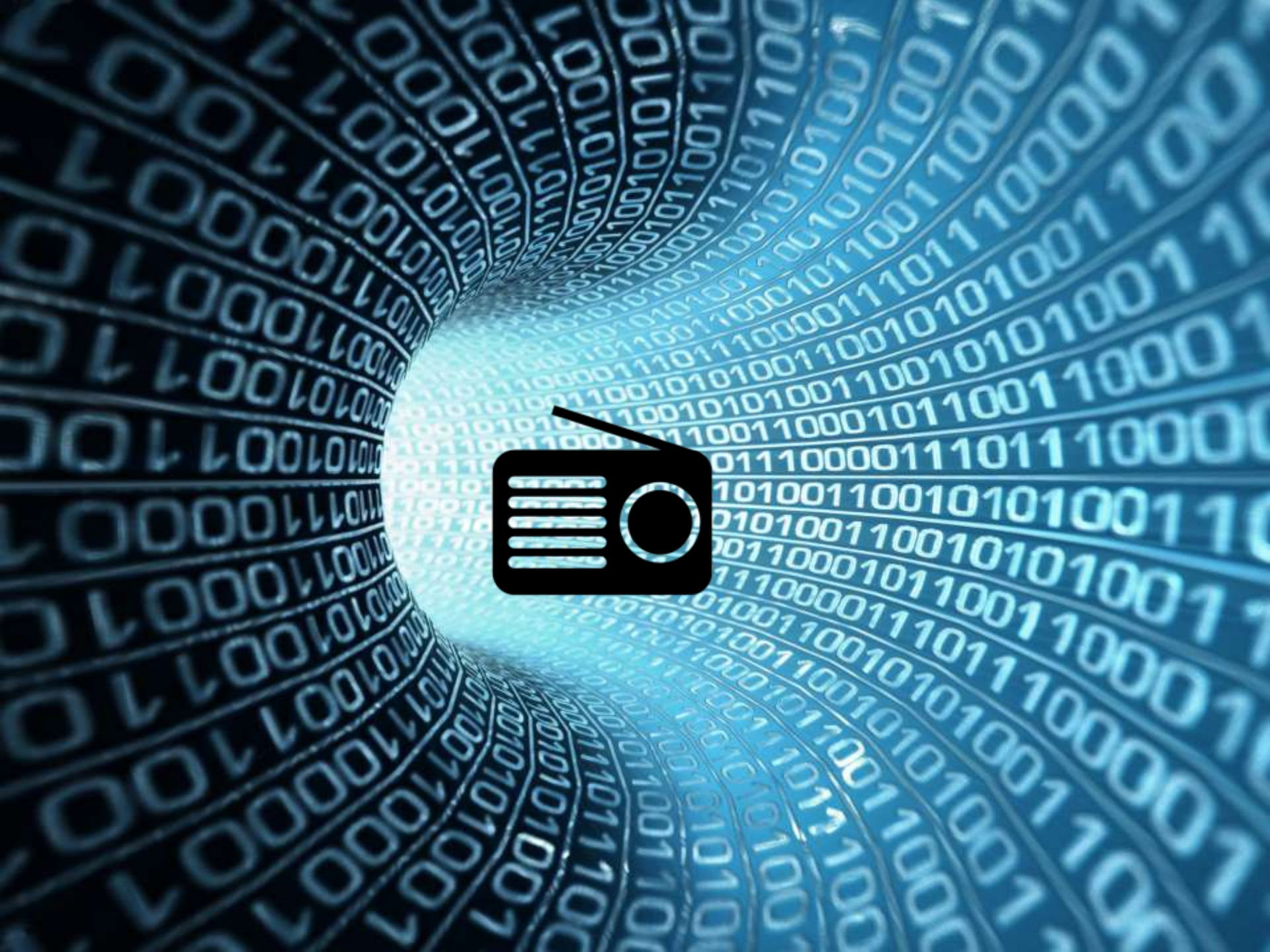
OPERATING EUROVISION AND EURORADIO

DIGITAL RADIO TOOLKIT

*Key factors for the deployment
of digital radio*

MEDIA INTELLIGENCE SERVICE





DIGITAL RADIO TOOLKIT

Key factors for the deployment of digital radio

Goal

- To identify good practices that foster the implementation of terrestrial digital radio
- To build the case for digital radio involving all the relevant stakeholders

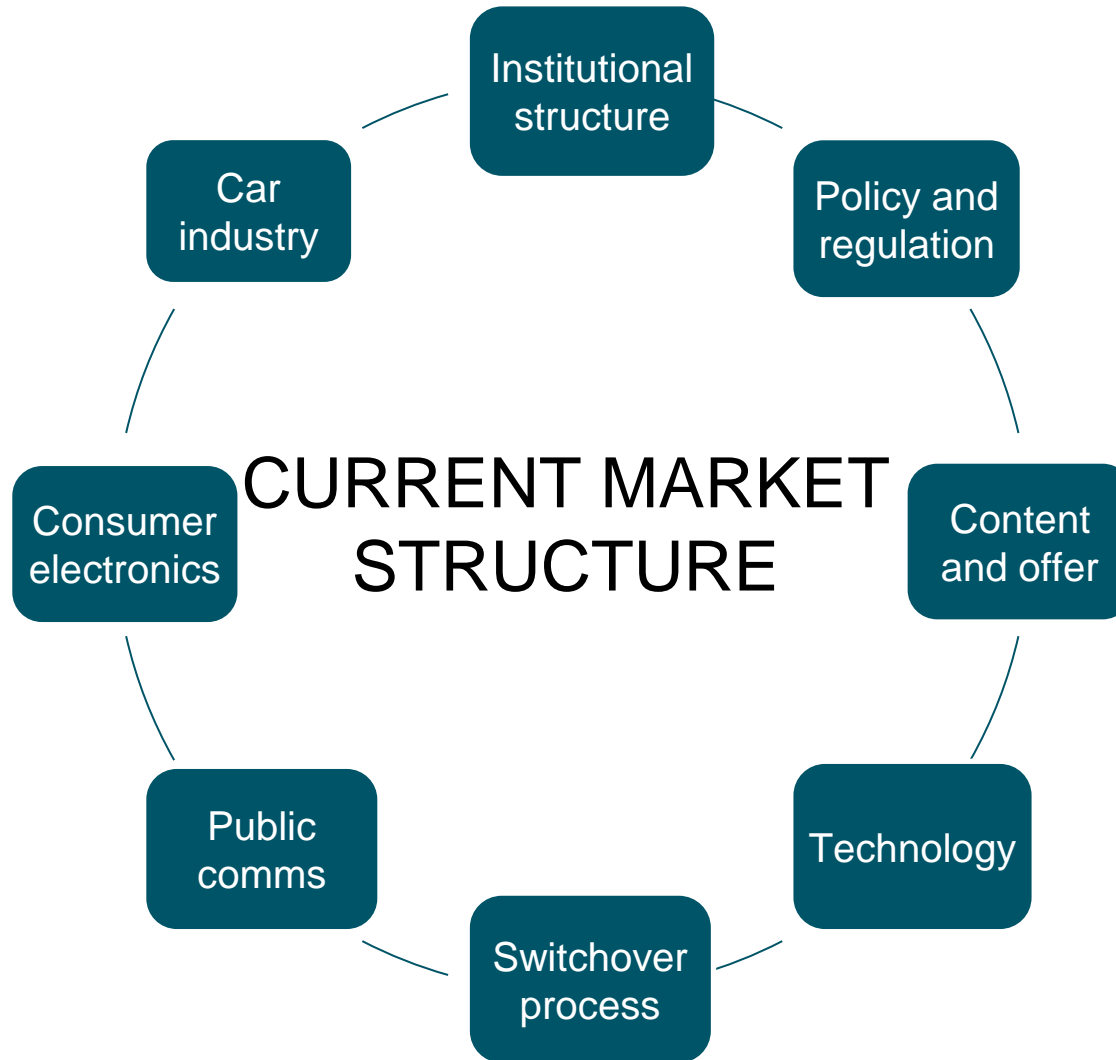


METHODOLOGY

- ✦ Desk research (market reports)

- ✦ 34 personal interviews (May – July 2014) to:
 - public service media
 - commercial broadcasters
 - network operators
 - government
 - regulatory authorities
 - industry trade bodies
 - car manufacturers

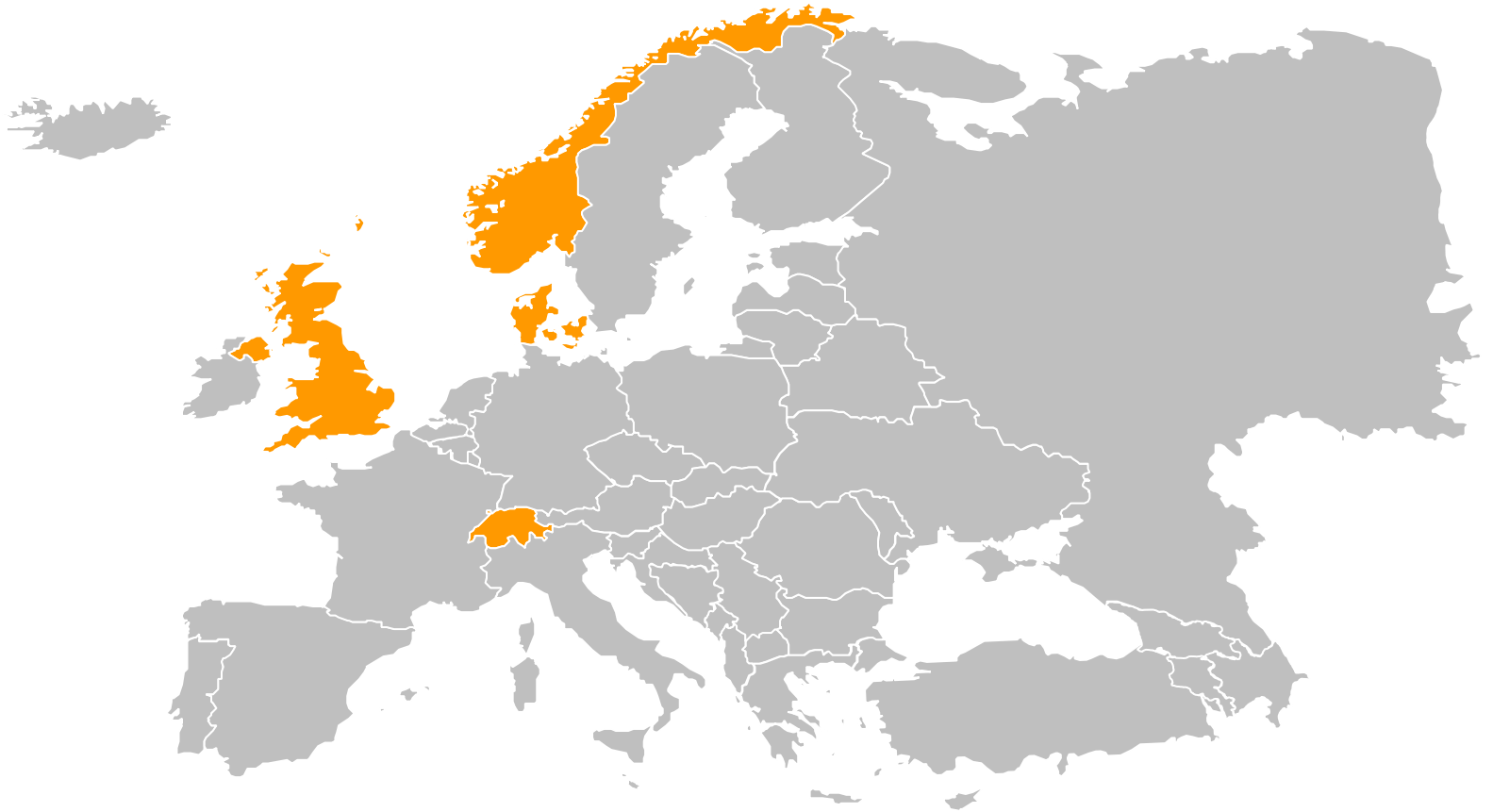
FACTORS TO BE ANALYSED



DAB ROLL-OUT

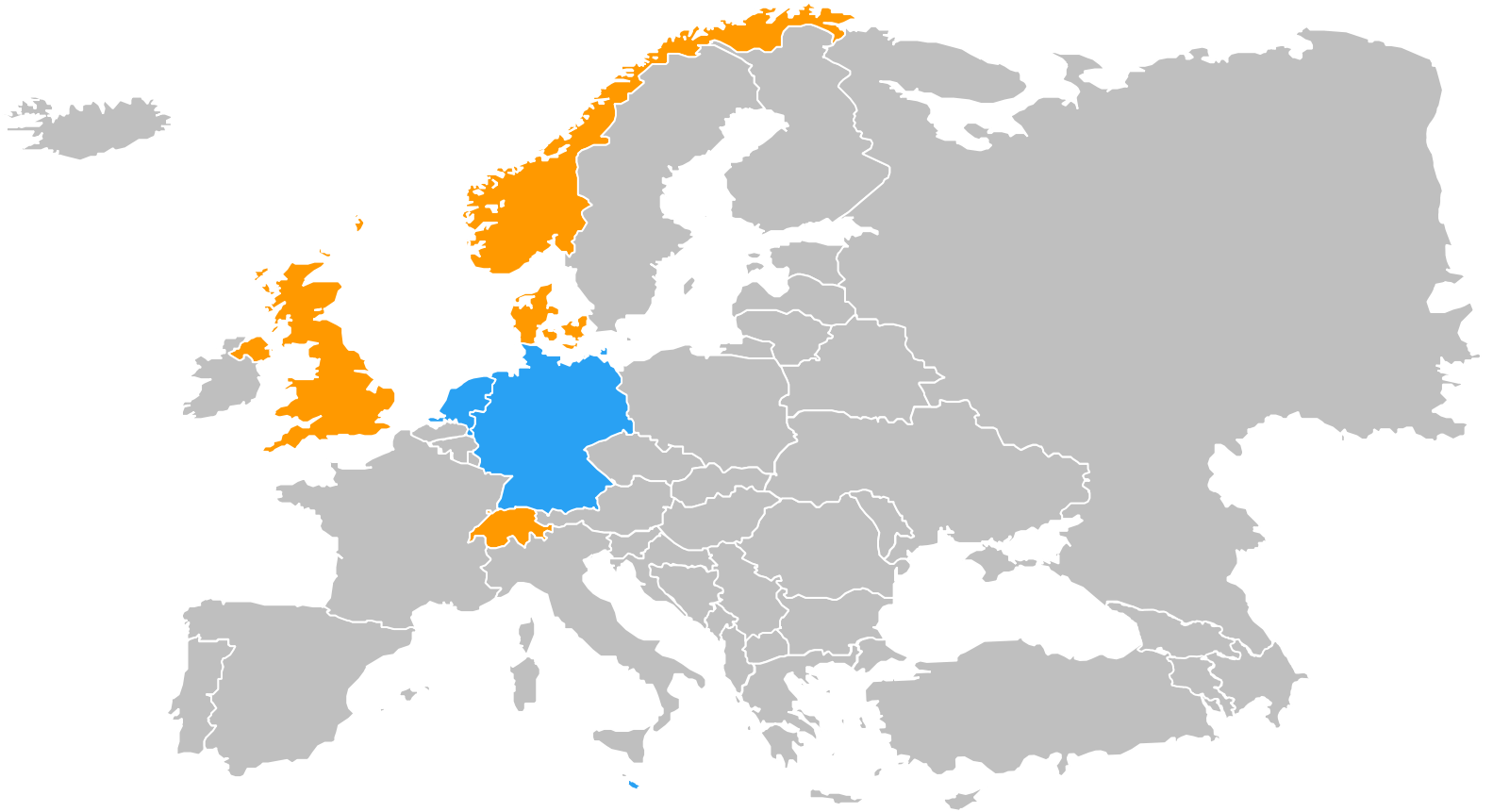


DAB ROLL-OUT



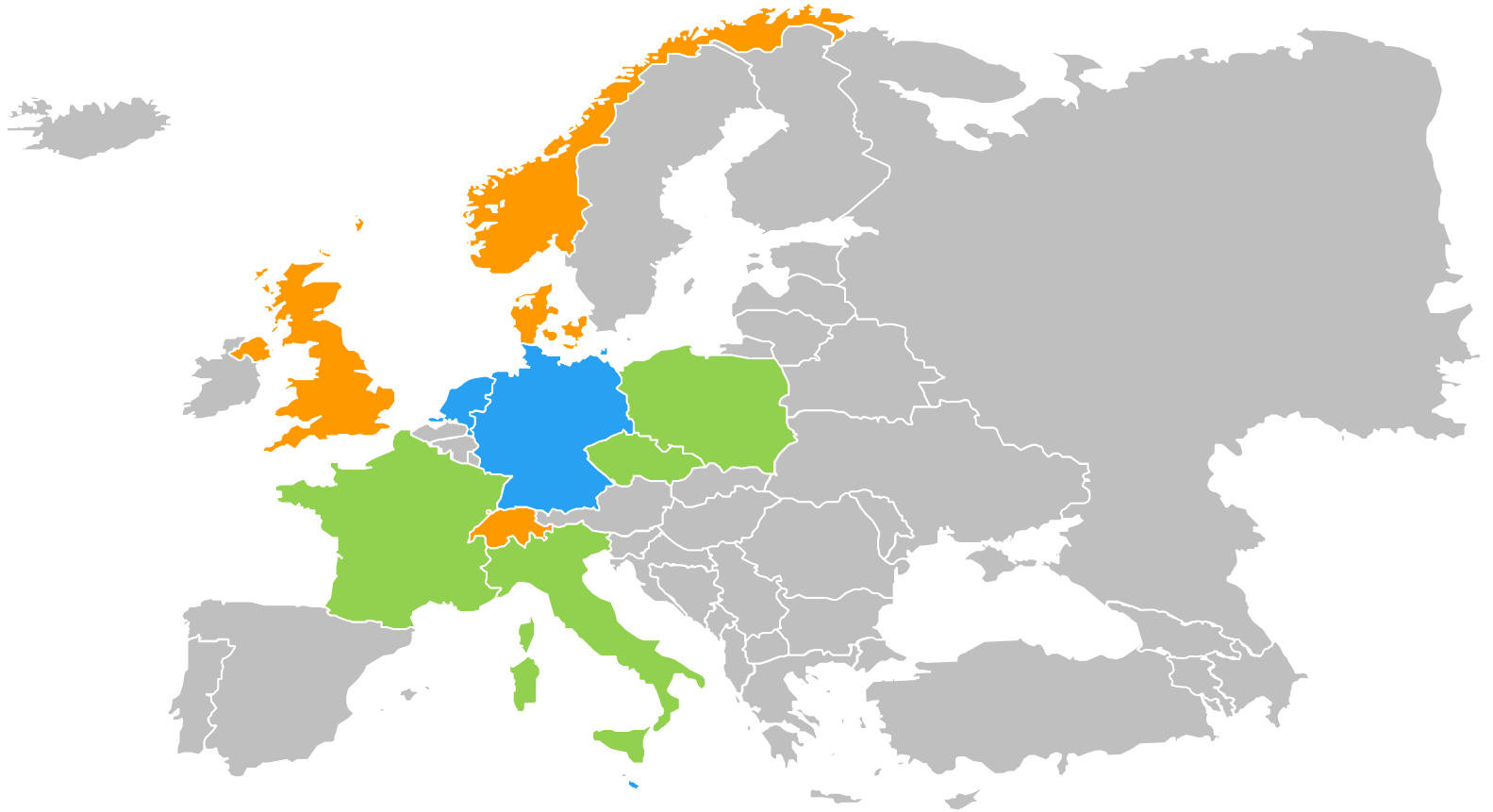
DIGITAL LEADERS

DAB ROLL-OUT



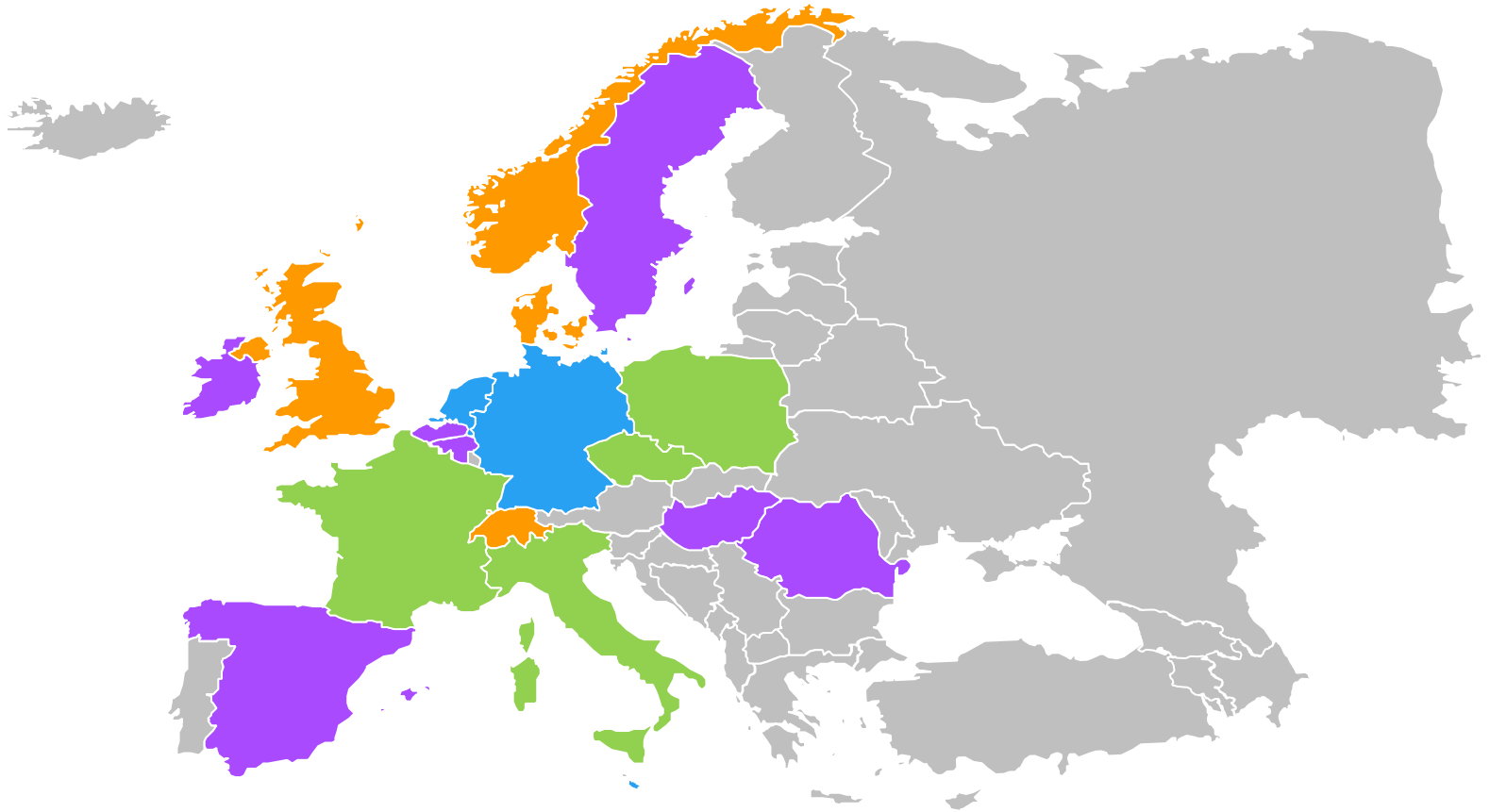
DIGITAL EMBRACERS

DAB ROLL-OUT



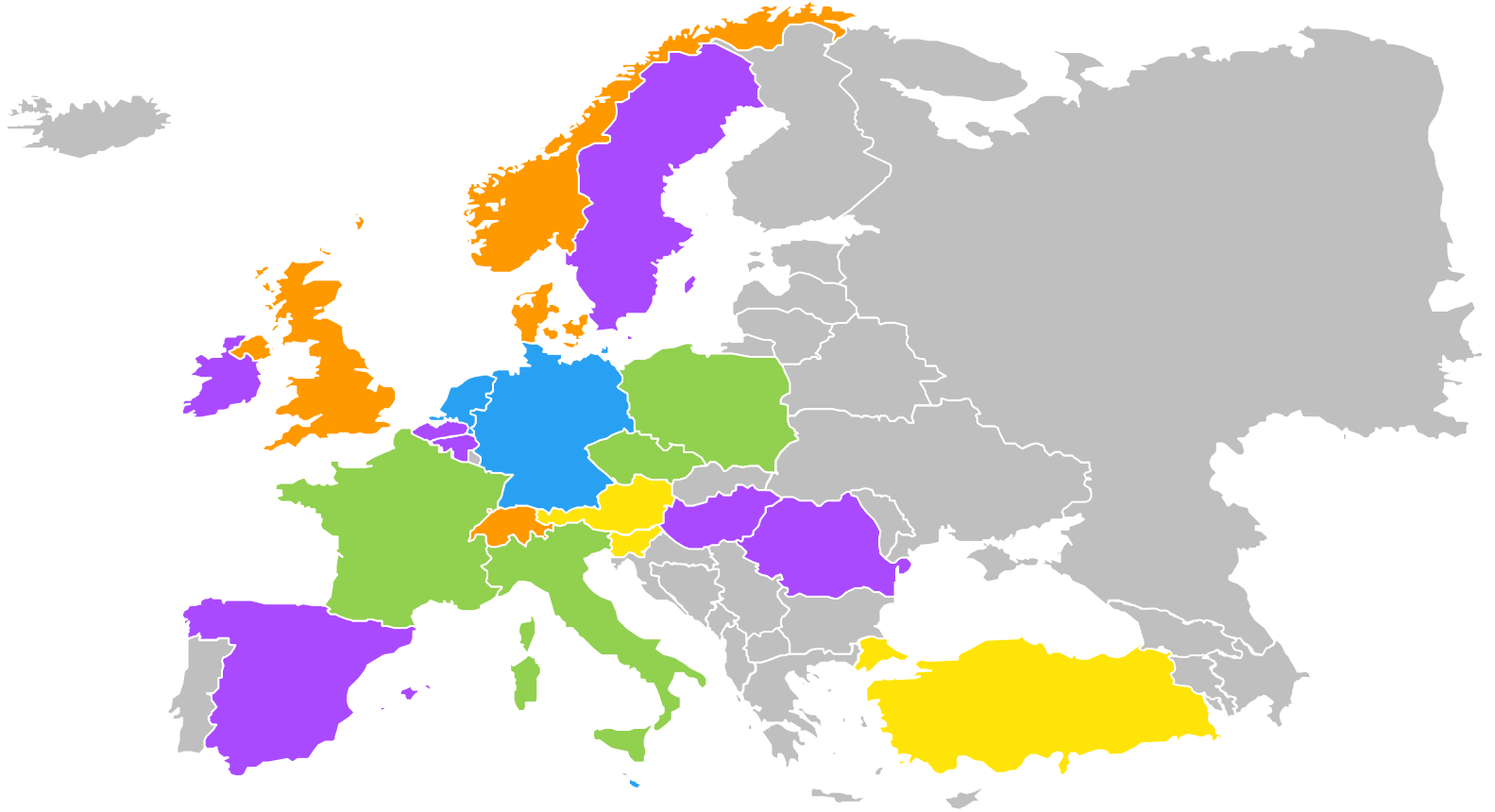
DIGITAL NEWBIES

DAB ROLL-OUT



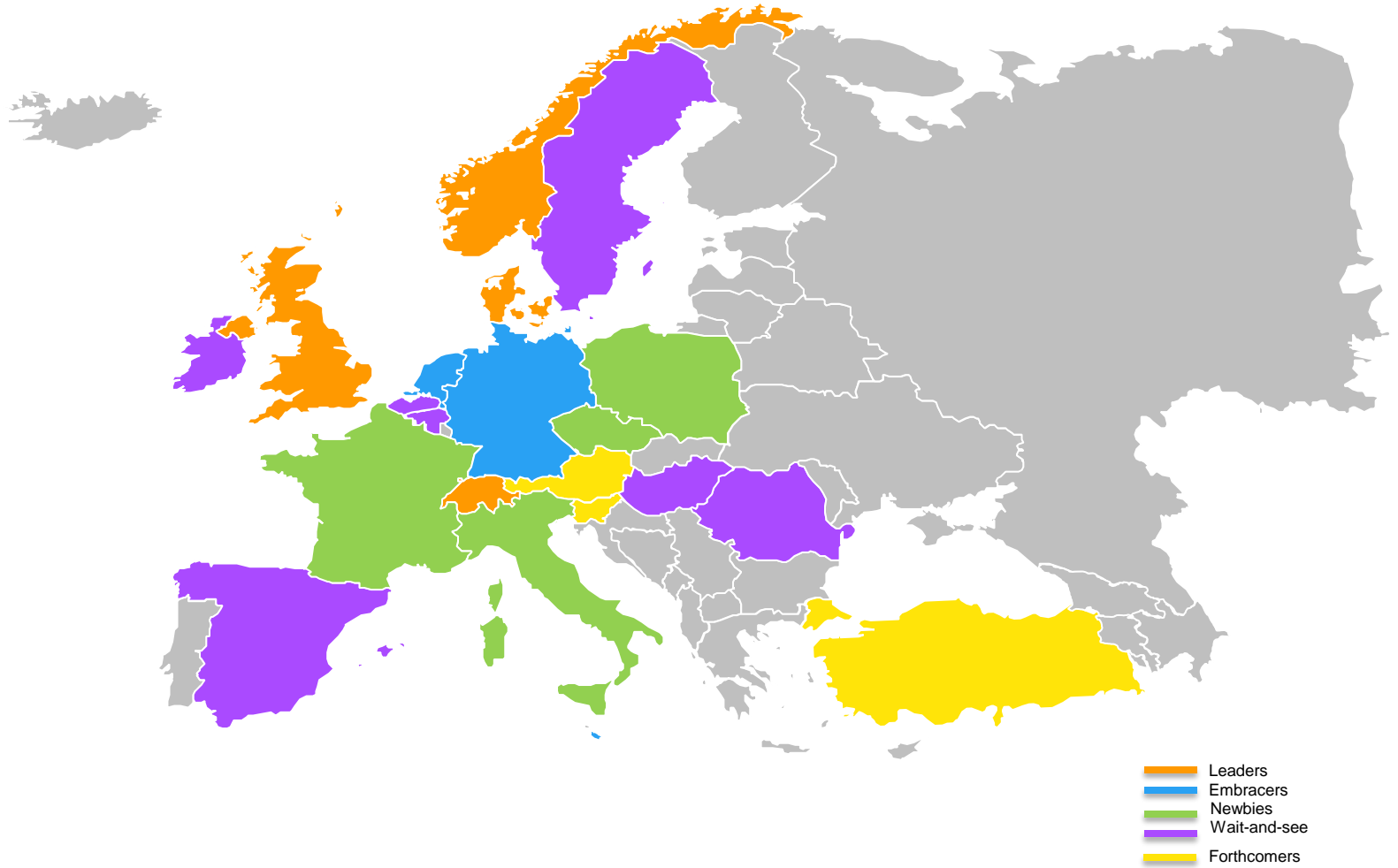
WAIT-AND-SEE

DAB ROLL-OUT



DIGITAL FORTHCOMERS

DAB ROLL-OUT





NATIONAL ISSUES MATTER

- ✦ National wealth
- ✦ ICT-awareness

- ✦ Level and nature of competition in the radio market
- ✦ Relative strength of PSM
- ✦ National, regional and local radio levels
- ✦ Size of the advertising market
- ✦ Radio share of the advertising market
- ✦ Regulation

NO ONE-SIZE-FITS-ALL SOLUTION

30 KEY SUCCESS FACTORS

EBU

OPERATING EUROVISION AND EURORADIO

1. INSTITUTIONAL STRUCTURE

- ✦ Involve all the stakeholders
 - by creating win-win situations
- ✦ Set up an industry body
 - = broadcasters can focus on their core activity
- ✦ Approach the authorities with a unified message
 - = a common message will make the case for digital radio stronger and more difficult to be ignored

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MC
DT

2. POLICY AND REGULATION

- ✦ Set regulatory incentives
e.g. extension / renewal of analogue licences, change of content requirements, etc.
- ✦ Rethink your licensing system
e.g. mux licenses, broadcasting licences or both?
- ✦ Correct regulation
→ by strengthening values



2. POLICY AND REGULATION



market
viability

citizens'
interest

3. CONTENT AND OFFER (I)

- ✦ Add value to the current offer
= new channels are the best content proposition
- ✦ Find unattended audiences
→ by exploring new niches
- ✦ Rely on familiar and well-positioned brands
= makes things easier for broadcasters and for the listener



3. CONTENT AND OFFER (II)

- ✦ Build economies of scale
 - by enlarging distribution or sharing production costs

- ✦ Design a product strategy, not a platform one
 - = bundle your offer, even your advertising

- ✦ Drive people to digital listenership
 - by moving stations or programmes to digital-only

Absolute Radio →

Absolute Radio →	60s	Absolute Radio →	90s
Absolute Radio →	70s	Absolute Radio →	00s
Absolute Radio →	80s	Absolute Radio →	CLASSIC ROCK

RADIO SWISS JAZZ SRG SSR	RADIO SWISS POP SRG SSR	RADIO SWISS CLASSIC SRG SSR
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Musik Welle
RADIO SRF

option
musique
RTS



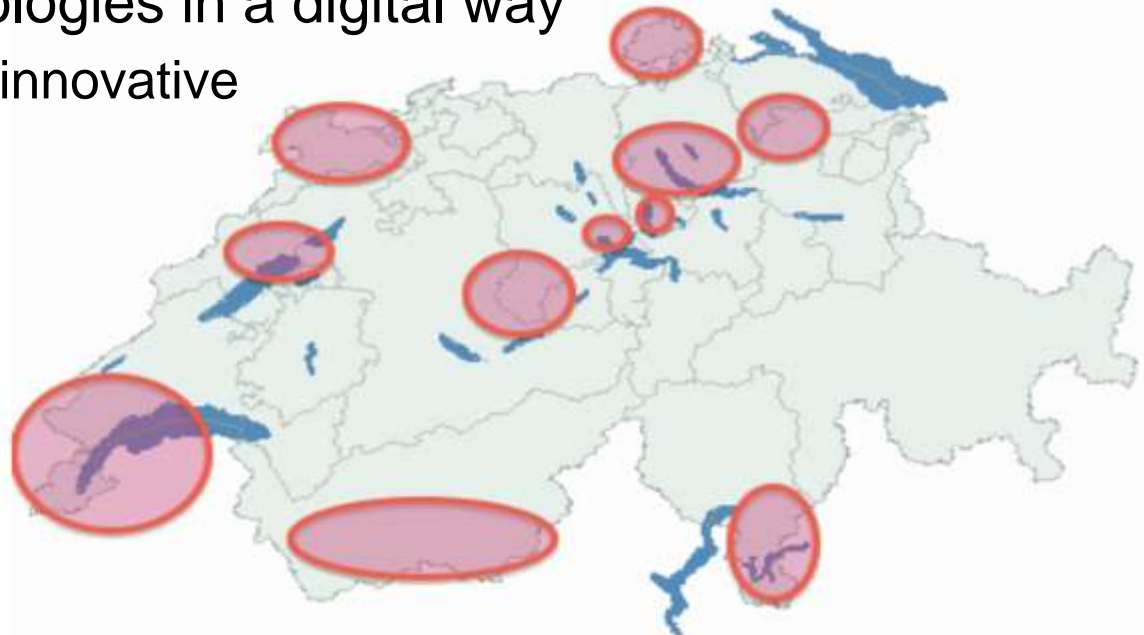
4. TECHNOLOGY (I)

- ✦ Ensure good coverage
= at least equal to analogue coverage
- ✦ Reduce transmission costs
= digital transmission is cheaper than analogue but benefits only arrive with the analogue switch-off
- ✦ Extend collaboration to all technological platforms
e.g. Internet player, mobile player app, hybrid radio, etc.



4. TECHNOLOGY (II)

- ✦ Make the case for local radio
 - = not losing a service currently available
- ✦ Be flexible with the quality
 - by using bitrate regulation
- ✦ Use technologies in a digital way
 - by being innovative



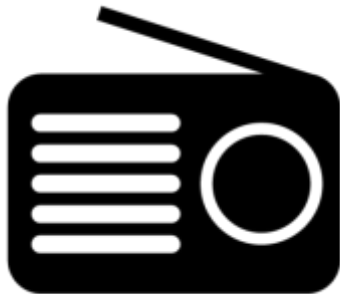
5. SWITCHOVER PROCESS

- ✦ Plan the process
 - = set guidelines for the transition
- ✦ Set realistic criteria for the switch-off
 - = they must be measurable and data must be collected systematically
- ✦ Set a clear calendar
 - = strong signal about the commitment of the stakeholders



6. PUBLIC COMMUNICATIONS

- ✦ Communicate a single, clear and accurate message
= show the added value
- ✦ Plan digital radio promotion
= coordination of messages and channels
- ✦ Target the related industries
e.g. consumer electronics, car industry



7. CONSUMER ELECTRONICS

- ✦ Make affordable devices available in the market
 - = low-income listeners can switch
- ✦ Offer future-proof devices
 - through information campaigns, certification marks, mandatory digital tuners, etc.
- ✦ Ensure a good buying experience
 - through training and relevant displaying

digitalradio 

8. CAR INDUSTRY

- ✦ Target the car industry early
 - by using both the content and the safety proposition
- ✦ Attend the aftermarket
 - = current radio audience is there
- ✦ Ensure a seamless in-car radio experience
 - = good coverage in roads, including tunnels



DIGITAL RADIO KEY CHALLENGES: SIX "C"

Coverage

Content

Costs

Communication

Collaboration

COMMITMENT

THANK YOU!

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www.ebu.ch/euroradio