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# Digital Radio Cultures in Europe

Brian O'Neill

*Dublin Institute of Technology, [brian.oneill@dit.ie](mailto:brian.oneill@dit.ie)*

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# **Digital Radio Cultures in Europe**

**Presentation at the Canadian Radio-television and  
Telecommunications Commission**

**July 5, 2007**

**Brian O'Neill, Dublin Institute of Technology**

# DRACE

## DIGITAL RADIO CULTURES IN EUROPE



### DRACE

#### RESEARCH PROJECTS

THE TECHNO-  
LOGICAL  
LANDSCAPE OF  
RADIO

DAB: THE FUTURE  
OF RADIO?

ONLINE RADIO  
CULTURES

MEDIA  
PARTICIPATION  
AND EXPERIENCE

Digital Radio Cultures in Europe (DRACE) specializes in cross-national research about digital radio and sound media.

The objective of this group is to do empirical research on changes in radio and sound cultures inspired by the move from analogue to digital platforms. DRACE will point out desirable and realistic paths of development in European broadcasting; aiming to advice media policy makers, public service broadcasters and private businesses.

DRACE has representatives from a dozen European Universities, among them the University of Bergen, Dublin Institute of Technology, Aristotele University of Thessaloniki and the University of Tampere.

DRACE was established in London in June 2004. Until June 2006 it was funded by the COST A20 action "The Impact of the Internet on the Mass Media in Europe". It now lives on as an independent research group, hosted by the Department of Information Science and Media Studies, University of Bergen.



# DRACE Research Group

## **University-based Network**

*University of Bergen*

*University of Aarhus*

*University of Tampere*

*Dublin Institute of Technology*

*University of Leeds*

*(University of Oregon; Ryerson University)*

## **Publications**

*Media, Culture & Society*

*Information, Communication and Society*

*Journal of Radio & Audio Media*

*Canadian Journal of Communication*

*Convergence*

*Nordicom*





# **DAB: the future of radio?**

The development of digital radio  
in four European countries

**Stephen Lax**

University of Leeds, UK

**Marko Ala-Fossi**

University of Tampere, Finland

**Per Jauert**

University of Aarhus, Denmark

**Helen Shaw**

Dublin City University, Ireland

**D R A C E**

DIGITAL RADIO CULTURES IN EUROPE

# High levels of DAB services

- Belgium:  
98% of population is covered. Public radio stations on DAB, including some digital-only. Low but increasing sales of receivers.
- Germany:  
85% coverage. Around 80 stations, public and commercial, but relatively low rates of receiver ownership.
- United Kingdom: 85% coverage. Large no. of stations on DAB, public and commercial (some digital-only). Approx. 3m receivers.

# Medium to high levels of service

- Denmark: 90% coverage. Public stations on DAB and one commercial station, but little interest from commercial radio. Steadily increasing numbers of receivers.
- Norway: 70% coverage. Mostly public stations (some digital-only), and two commercial simulcasts. Low penetration of receivers.

# Low to Medium levels of service

- Finland: 40% coverage but transmission ended in 2005. Public stations only (some digital only) until cessation. Low penetration of receivers.
- Netherlands: 70% coverage. Public stations mostly, some commercial licences expected to be granted in 2006.
- Sweden: 35% coverage. Public stations only, service curtailed in 2002 due to low receiver penetration. Government support for expansion of DAB withdrawn in 2006.



# Low levels of service

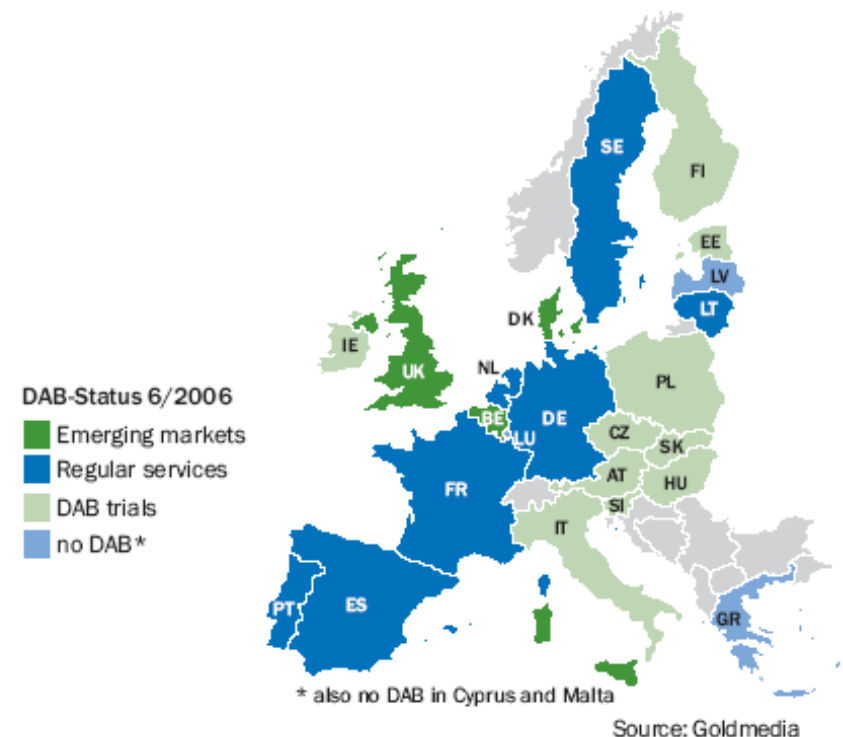
- France: Services exist in a small number of cities on the L-band only. Others have ceased and Band III trials underway in Paris. Low penetration of receivers.
- Hungary: Two transmitters cover parts of Budapest only. Public stations only, one digital-only. Almost no receivers owned by public.
- Ireland: No DAB transmissions other than some re-launched trials in Dublin.

\*Data extracted from CEPT RRC06 Working Group Report, October 2005

# Digital policy for radio (and TV)

- **UK:** market-influenced policy gives leading role to commercial radio. Incentivised by legislation & regulation to invest in DAB.
- **Denmark:** public service broadcaster charged with driving DAB development.
- **Finland:** public service broadcaster to drive DAB but limited government support; more strategic support for digital TV.
- **Ireland:** officially adopts a 'wait & see' policy.

Figure 70 : Overview: Status of DAB in EU25 (June 2006)



# Factors influencing DAB: 1

## Existing state of radio

- UK: expansion & consolidation of commercial radio market, but almost exhausted FM spectrum
- Denmark & Finland: slower expansion, strong public service radio, but little FM capacity left
- Ireland: managed expansion of small, independent commercial and community sector, with significant unused FM spectrum

# Factors influencing DAB: 2

## Role of public service and commercial radio

- UK: strong commercial sector with high degree of market consolidation
- Denmark: strong public service broadcaster. National commercial radio relatively small, and reluctant to join
- Finland: public service broadcaster begins to develop DAB; commercial radio reluctant. Undermined by government support for digital TV
- Ireland: some interest from public broadcaster, but no support from commercial radio

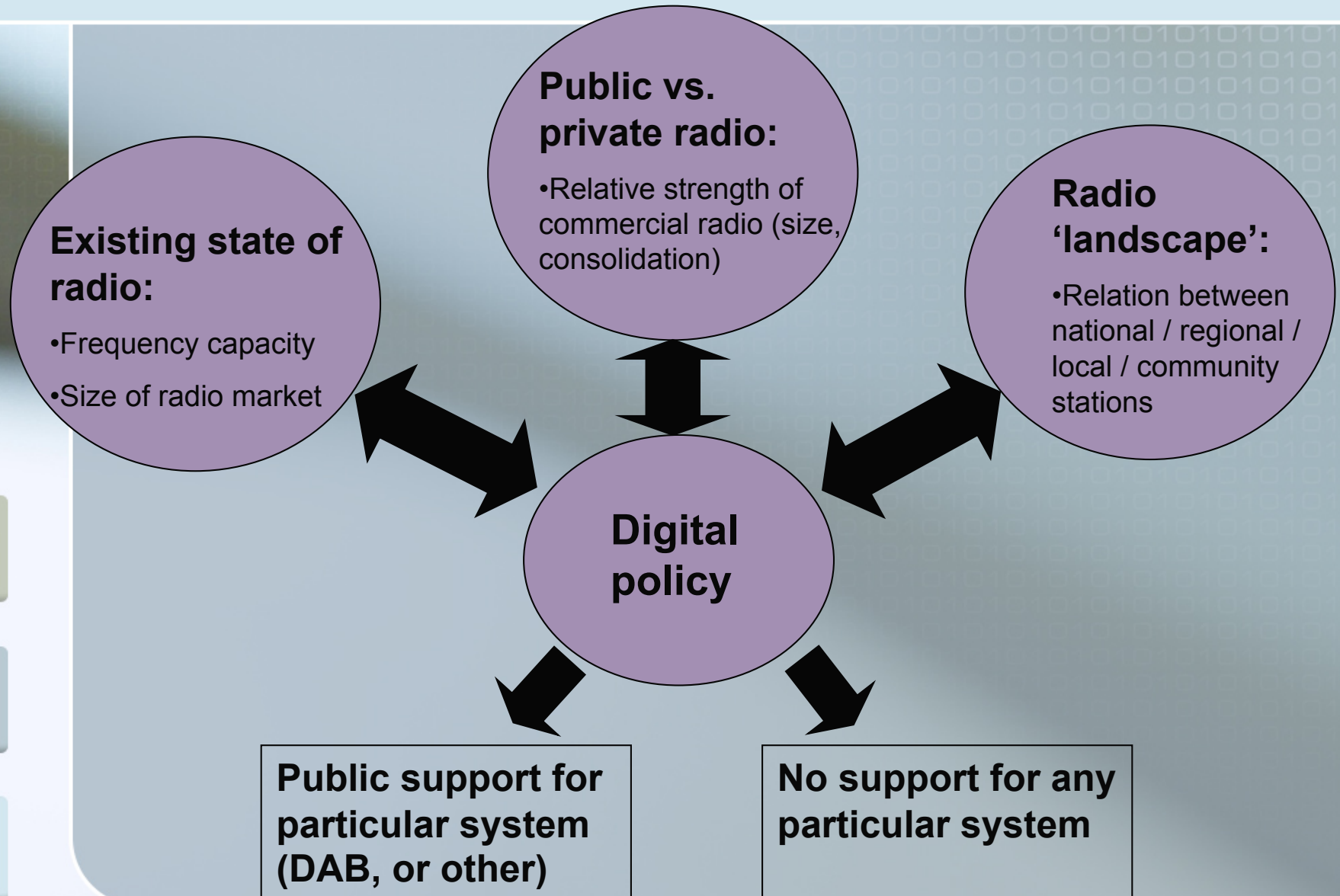


# Factors influencing DAB: 3

## Radio 'landscape': local vs. national services

- UK: large no. local/regional services; large radio groups mean networking gives economic benefits
- Denmark: small local and community services not appropriate for DAB. National/regional only on DAB
- Finland: small local services not appropriate for DAB. National/regional public services only on DAB
- Ireland: local stations are either small commercial stations or community stations. DAB not appropriate

# Conclusion





# **The Future of Radio is Still Digital - But Which One?**

## **Expert Perspectives and Future Scenarios for Radio Media in 2015**

**Marko Ala-Fossi**

University of Tampere, Finland

**Stephen Lax**

University of Leeds, UK

**Brian O'Neill**

Dublin Institute of Technology, Ireland

**Per Jauert**

University of Aarhus, Denmark

**Helen Shaw**

Dublin City University, Ireland

**DRACE**

DIGITAL RADIO CULTURES IN EUROPE

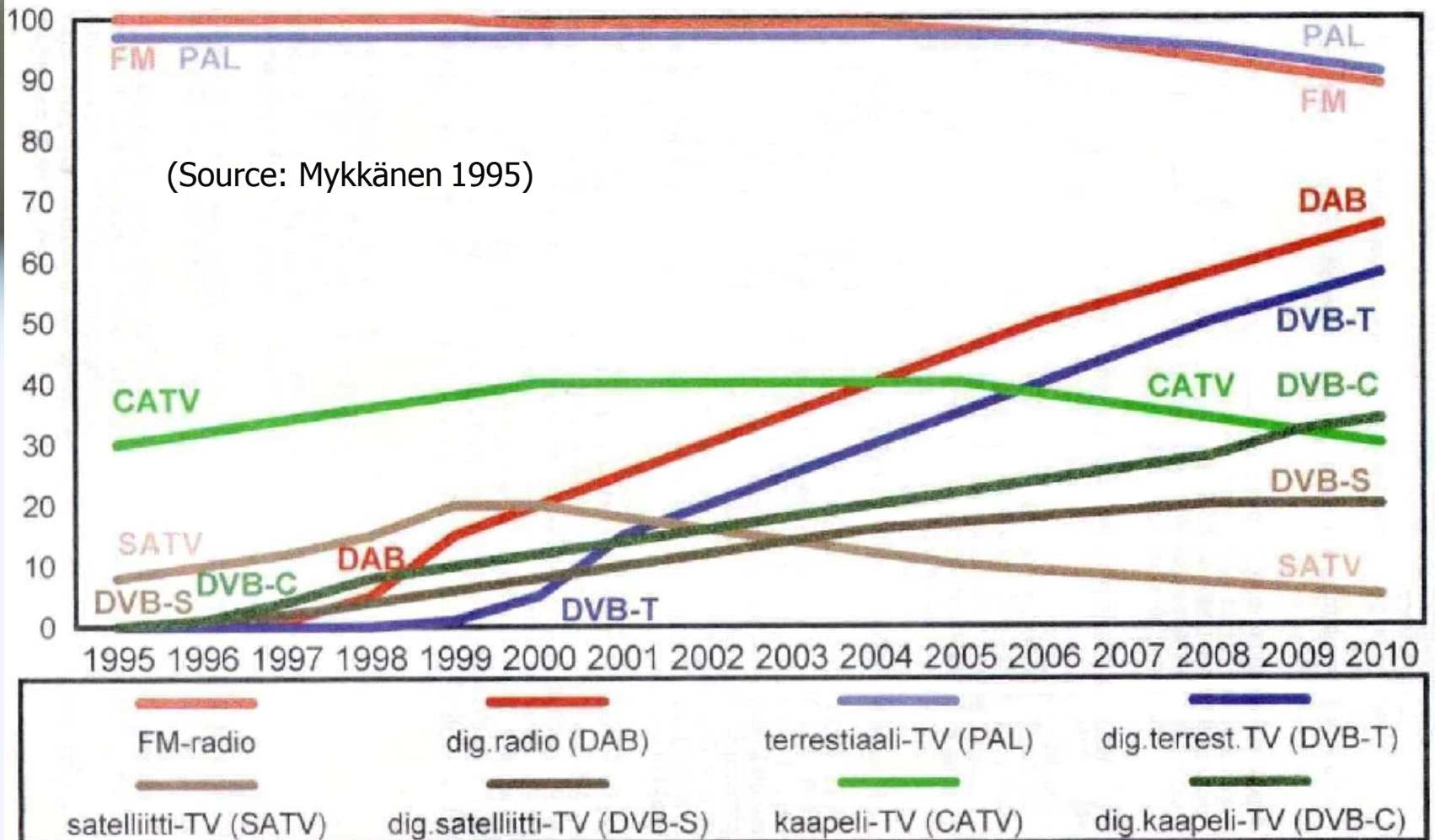


# DAB scenario 1995: Case Finland

## Diffusion of television and radio delivery systems in Finland

diffusion estimate, percentage of households

scenario 1995- 2010





# Expert perspectives on the present future of radio

- Data: 43 expert interviews between 05/2005-06/2006: Ireland (3), UK (13), Denmark (6), Finland (11) and Canada (10)
- Method: Qualitative content analysis with a grounded approach
- Theoretical approach: Based on social shaping of technology perspective *and* diffusion of innovations theory

# How do you think people will receive radio content in 2015?

- Most respondents believed in some kind of digital terrestrial radio in their home countries
- DAB will be a strong option in the UK and Denmark, but even there supplemented with DRM and DMB
- DVB-H was popular in Finland; Canada might have DAB, satellite radio (and IBOC)
- Most respondents believed that FM radio will remain significant
- Internet-based radio and audio services will grow, but the idea of satellite radio was rejected in Europe
- **No consensus about the dominant European way of delivering radio in 2015: on the contrary, most believed that there will be distinct national solutions**

# Why will it be like that?

- Differences in national regulation and frequency administration will result in fragmentary situation in Europe
- Proprietary systems will not be tolerated, expensive copyright payments may prevent the use of certain systems
- The existing market penetration of FM radio means that it will be around for a while
- DAB is an expensive and uneconomic system for commercial and community stations
- DAB coverage patterns do not match with the needs of commercial and community stations
- In Europe, DRM is the favorite secondary system – to supplement or even replace DAB

# What will radio content be like in 2015 ?

## Two main trends everywhere:

### a) Personalized/on-demand radio will grow:

- Higher listener sovereignty: more specialized options, no schedules - audio where and when you want it
- More content will be produced by audiences

### b) Traditional broadcast/linear radio will remain because of its strengths:

- Mobility, easy access, real-time broadcasts, localism, entertainment as well as traditional journalistic and artistic audio programming
- However, different types of content may be linked to different platforms



# Future Scenarios

*Multimedia, on-demand and subscription services are gradually becoming as important as traditional broadcast audio*

## 'Digital Diversity'

*Radio will become digital by using different technologies in different markets. No dominant design on a global level.*

## 'Multimedia Market'

*Digital radio will have a dominant design: a globally used technology or set of complementary technologies*

**Content Consumption**

**Delivery Technology**

## 'Towers of Babel'

*Free broadcast delivery and linear, real-time consumption of audio content is the most important way to use both analog and digital radio*

## 'DAB DReaM'

# Future Scenarios

## *Digital Diversity:*

Consumption is on-demand and subscription; multiplicity of technology platforms

**25.6%**

## *Multimedia Market:*

Consumption is on-demand and subscription; clearly dominant technology platform(s)

**20.9%**

## *Towers of Babel:*

Consumption primarily linear; multiplicity of technology platforms

**37.2%**

## *DAB DReaM:*

Consumption primarily linear; unified technology platform(s)

**16.3%**

# EBU: Digital radio environment in Europe (1)

- Analogue audiences will continue to decline especially among younger listeners
- Digital radio in the form of DAB has succeeded in several markets because of a strong commitment by public service broadcasters
- Digital radio in the form of DRM has received strong support from Public Service Broadcasters
- Countries with a significant investment in DAB and an installed base of consumer equipment will proceed with DAB.



# EBU: Digital radio environment in Europe (2)

- The rate of technology migrations will increase
- Multiple platforms will coexist
- Consensus of all key industry players is necessary to drive radio digitalisation
- The European Commission may facilitate digital radio
- Without a dedicated transmission network, radio may risk being subsumed
- Analogue switch-over is not on the horizon for radio





