



Digital Radio Report 2011



it's radio as you
know it, plus...



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Introduction

The Digital Radio Industry Report 2011 is designed to provide a comprehensive status report on the rollout of DAB+ digital radio in Australia including updates on sales, listening and consumer research. The report compiled by Commercial Radio Australia (CRA) provides the only comprehensive collection of official data and consumer research results relating to digital radio in Australia.

DAB+ Digital Radio Services

High power permanent DAB+ digital radio services commenced in the major metropolitan markets of Sydney, Melbourne, Brisbane, Adelaide and Perth in August 2009 and have now been on air for 18 months. The coverage of the 5 major cities equates to coverage of almost 60% of the population of Australia.

Low power regional DAB+ trials began in July 2010 in Canberra and in August 2010 in Darwin.

In the metropolitan markets, up to **20 new DAB+ only** stations are on air in each market. In addition, in the past 18 months, 13 extra short-term "pop-up" or event focused stations have been created.

While new content is extremely important to encourage uptake of digital, radio stations also broadcast their analogue stations on DAB+ to ensure that listeners can access the content, shows and on-air personalities they already know and love on analogue via high quality DAB+ digital technology.

Receivers

There are now more than **80** different models of **DAB+ radios** on sale in Australia across **700 retail and online stores** produced by **30 different receiver manufacturers**.

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Research

As part of the regular metropolitan radio audience measurement surveys in Sydney, Melbourne, Brisbane, Adelaide and Perth, the Nielsen Company surveys digital radio listening of both commercial and ABC analogue stations being broadcast via DAB+ and new DAB+ digital-only stations.

In addition to these regular surveys, Hoop Group has been commissioned to conduct consumer research focusing on customer awareness and attitudes. This research is a follow up to comprehensive consumer research undertaken by Hoop Group in late 2009, soon after the official launch in August 2009.

Digital radio market data has now been captured by consumer durables market research company, GfK, in the DAB+ Marketscope report that incorporates retail sell in and sell through data.

In addition, included in the 2011 Digital Radio Industry Report is an analysis by PricewaterhouseCoopers (PWC) on Digital Radio Uptake. This is a conservative forecast of the household take up rate for DAB+ digital radio technology over the next three years.

Policy

At the end of 2010, the Minister for Broadband, Communications and the Digital Economy announced he had directed the regulator Australian Communications and Media Authority (ACMA) to allocate 14MHz VHF Band III for the rollout of digital radio into regional areas.

ACMA set up a joint industry and government planning group which has already met on a number of occasions to discuss issues around the planning of the restack of vacated analogue television spectrum and the subsequent use of spectrum for digital radio rollout into regions.

The commercial radio industry and SBS have jointly established a DAB+ digital radio trial in Canberra so that all Federal politicians can experience the benefits of DAB+ digital radio and what it may mean for the constituents in their home regions.

A Parliament House DAB+ switch on event was held in March 2011, at which all members of the House of Representatives and the Senate were provided with a DAB+ digital radio for use during the Canberra trial.

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International Developments

The digital radio standards DAB, DAB+ and DMB are on air in nearly 40 countries across Europe, Australia and Asia. The continued uptake of digital radio worldwide has increased the market for digital radio manufacturers and further encouraged the automotive industry to incorporate digital radio into new vehicles.

CRA continues to share DAB+ technical and commercial knowledge through digital radio study tours to Australia and conference sessions internationally.

A groundbreaking DAB+ application called Push Radio, which will allow podcasts to be sent via the DAB+ broadcast band directly to a listener's radio without the need to connect to the internet is being developed by Jolon Digital Media Broadcasting Co. Ltd.

CRA and Jolon have signed a Memorandum of Understanding to identify and develop the Push Radio application on DAB+.

2010 - Year in Review

In 2010, the success of the initial consumer launch was consolidated with the commercial radio industry initiating a number of technical and marketing projects throughout the year.

Improving Coverage

On Channel Repeater (OCR)

- CRA has built the highest powered digital radio transmission system in the world. However, as with any new technology, there are always improvements that can be made.
- The industry identified a small number of black spots in each city. It was decided by the operators that the DAB+ signal would benefit from supplementation and adjustment in these areas to ensure best possible coverage.
- An On Channel Repeater (OCR) solution was developed and trialled in the Melbourne CBD to assess impact of such an OCR on reception throughout the city centre. Trial results showed significant improvement in in-building reception.
- A process is now underway to develop an OCR rollout plan for the five launch cities in identified black spot areas that will benefit from a boost to the DAB+ signal.
- The trial and development of this OCR is a world first and the technology and expertise developed in Australia can be used world-wide.

Consumer Awareness

Digital Radio Ads

- The commercial radio operators and the ABC and SBS agreed before the launch in August 2009, that a unified and cooperative awareness campaign was needed to ensure that listeners to the major sectors were aware of the new technology.
- As a result; six weeks prior to the launch a joint approach to a listener awareness campaign was agreed and implemented.
- The commercial radio industry has continued this awareness campaign in all five capital cities and allocated more than \$25 million in air time to the on-air awareness campaign.

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- A series of radio ad campaigns have been played over the last 18 months by every analogue commercial radio station in each city focusing particularly on benefits of DAB+ digital radio - such as sound quality and station choice.
- The ads are run on both analogue and digital stations to ensure the maximum reach to listeners.
- While the general DAB+ awareness campaign runs all year round, specific ad campaigns are produced to target the key retail periods of Mother's Day, Father's Day and Christmas.
- A significant spike in digital radio sales has been seen during these periods.
- In recognition of high levels of support being offered by retailers, for the first time in the 2010 Christmas ad series, digital radio ads named specific retailers in the tag line.

Westfield Demonstration Kiosks

- In the lead-up to Christmas 2010, Digital Radio Demonstration Kiosks were established in 10 high traffic Westfield Shopping Centres in the five state capitals to promote directly to consumers the features and benefits of digital radio.
- The fully staffed kiosks featured a range of digital radios with different levels of functionality to allow consumers to "try before they buy".



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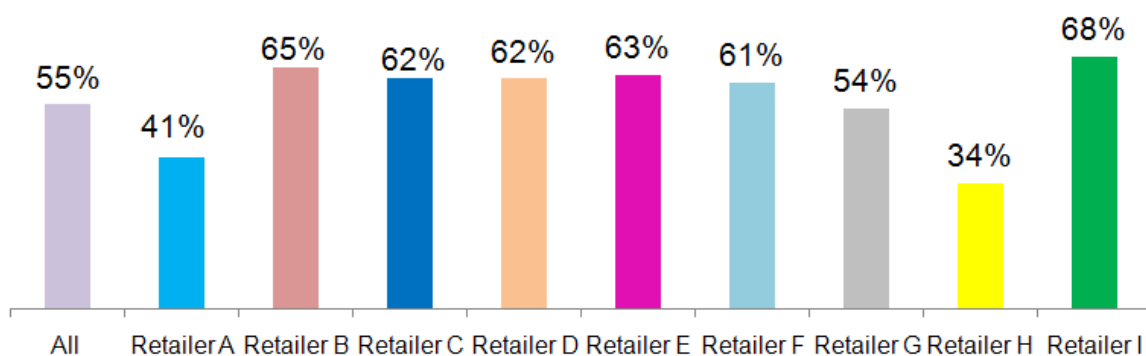
- Major Australian retailers, Dick Smith, Harvey Norman, the Good Guys, Myer and Target offered 10% discount voucher at the kiosks to be in store. A number of retailers also featured Digital Radio Plus point of sale materials.
- The highlighting of the Digital Radio Plus logo and product information in store created a visual impact and differentiated digital radios from analogue radios.



Mystery Shopper Research

To further develop the important collaborative relationship between the commercial radio industry and the retail sector, the commercial radio industry commissioned retail research company, HOED, to implement a Mystery Shopper Project.

- In November and December 2010, trained mystery shoppers visited 300 retail outlets, to assess a range of factors including digital radio point of sale, staff product knowledge and service.
- A second round of mystery shopping will be implemented early in 2011.
- There was a key strength in product knowledge across specialty electrical stores compared to discount department stores due to the nature of the retail environment.
- Average retailer performance scores range from 34% up to 68%,



Source: HOED CRA Mystery Shopper Study, 5 metro markets November, 2010.

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DAB+ Digital Radio Ambassadors

- With the support of digital radio manufacturers the commercial radio industry implemented the **Digital Radio Ambassador program**.
- On-air presenters became on-air ambassadors for DAB+ digital radio.
- The ambassadors talk on a regular basis about digital radio on-air; run competitions to win DAB+ digital radios and invite listeners to get the benefits of digital radio by purchasing and listening to them on digital radio.
- A number of the ambassadors visited the Westfield Demonstration Kiosks during the Christmas 2010 promotion to share their enthusiasm for, and knowledge of, digital radio with their fans.
- Hoop Consumer research shows that more than 87 percent of those who have purchased a digital radio said they would recommend it to a friend.

Digital Radio System Switch On at Parliament House Canberra

- The Minister for Broadband, Communications and the Digital Economy Senator Stephen Conroy switched on a system for the broadcast of DAB+ digital radio in Parliament House in March 2011, allowing Federal politicians to experience firsthand the broadcast of 12 local stations on the DAB+ platform.
- Government, Opposition and Independent MPs and Senators, plus digital radio manufacturers and retailers attended the official switch on function.
- All Members of Parliament and Senators were presented with a digital radio donated by digital radio manufacturers; Bush, Grundig, NextWave Digital, OXX Digital, Philips, Pure, Roberts, Sangean, Tangent and Teac.
- The Parliament House digital radio signal is a re-boost of the Canberra regional trial that commenced on 22 July 2010.
- Reinforcement of the signal was required to navigate the manmade and natural challenges of the unique Parliament House structure.
- By transmitting the DAB+ trial signal into Parliament House and providing digital radios to all Members of Parliament and Senators, the industry hopes they will experience the benefits of digital radio and support the rollout of digital radio for all Australians.

Listening

The Nielsen Company conducts the official radio audience measurement surveys for radio in Sydney, Melbourne, Brisbane, Adelaide and Perth and some major regional centres surveying over 60,000 people per year.

Each of the 5 launch cities has eight surveys per year over 46 weeks. From the launch in 2009, listeners were asked to record platform of listening. That is, listening via an analogue device, a DAB+ digital radio device, or via the internet.

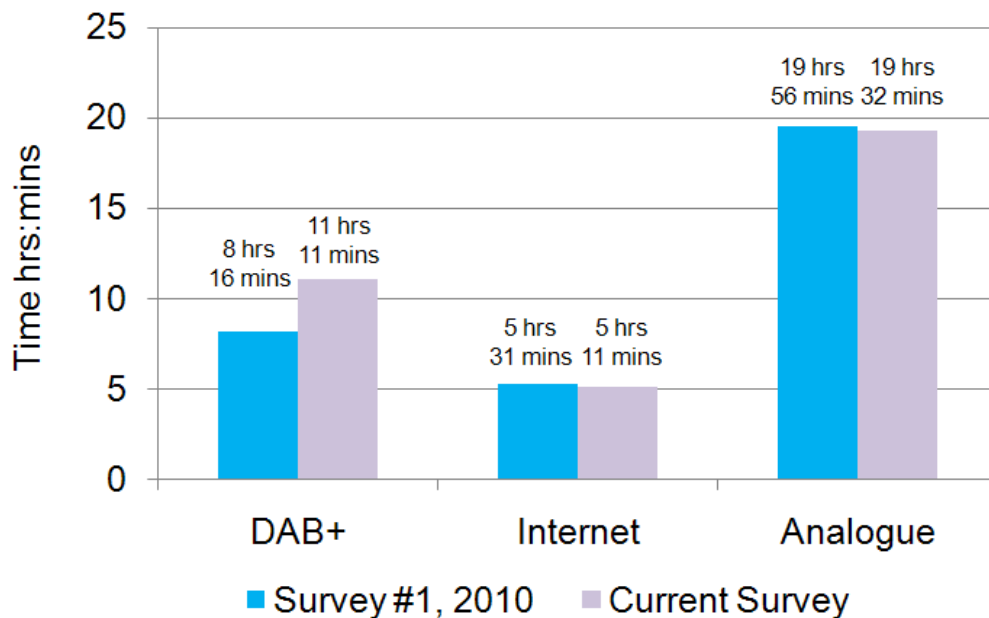
The sticker diary introduced in 2009 also allowed listeners to record listening and how they listened to both existing stations and to DAB+ digital-only stations.

All references to the latest or current survey results refer to the combination of Survey #1, 2011 for Sydney, Melbourne, Adelaide and Perth and Survey #8, 2010 for Brisbane due to the cancellation of Brisbane's Survey #1, 2011.

Platform of Listening

- In the current survey around **11.67 million** Australians (**94%**) in the five capital cities listened to radio via the analogue platform for **19hrs 14mins**.
- In the current survey **691 000** (5.6%) people listened to radio on the **DAB+ digital radio** platform. This is an increase of 242 000 listeners since Survey #1, 2010, when listening was recorded at **449 000** (3.7%).
- The current survey recorded time spent listening to radio via **DAB+ digital radio devices** was **11hrs 11mins** each week. Time spent listening increased by 2 hours and 55 minutes since Survey #1, 2010.
- Radio listening via the internet had a cumulative audience of 745 000 (6.0%) per week with time spent listening to radio via Internet at 5hrs 11mins each week.
- Time spent listening to radio via a DAB+ digital radio has already overtaken listening to radio on the internet by over 2 to 1.

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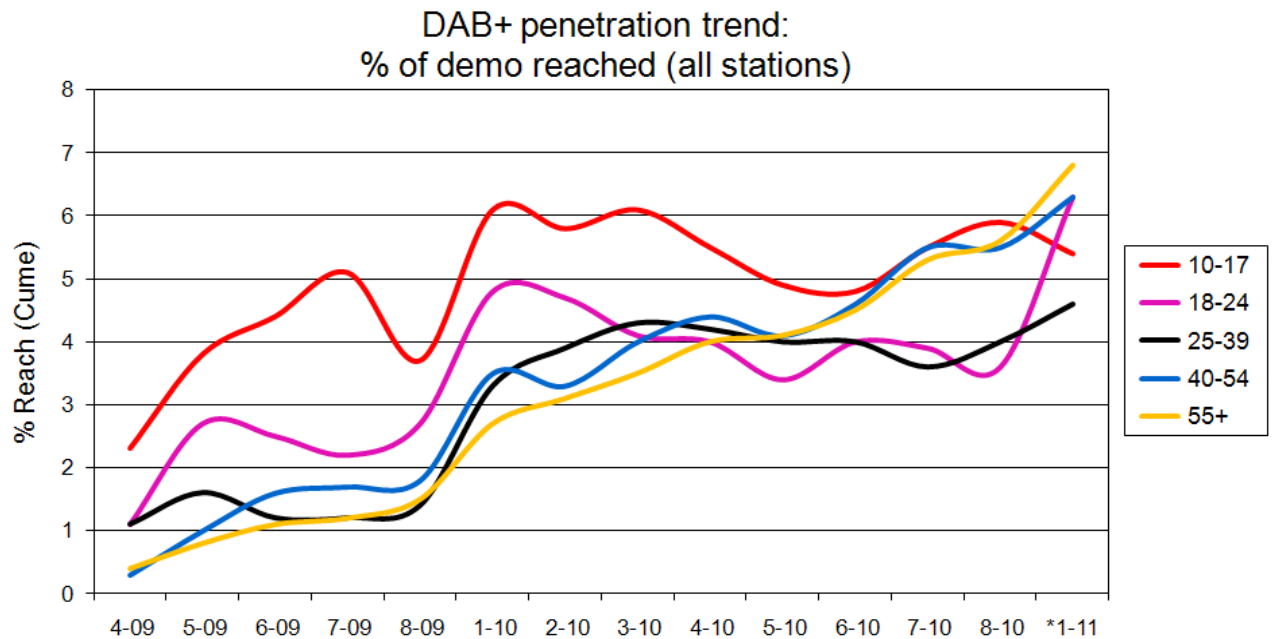
Source: The Nielsen Company Radio Ratings. How Listened. Mon-Sun 5.30am-12midnight. Survey #1, 2010 SMBAP, current survey; combination of Survey #1, 2011, SMAP & Survey #8, 2010 for Brisbane. All People 10+.

Share of Listening by platform

- **5.6% of the total metropolitan population listen via DAB+ each week.** This is up from **1.6% in Survey #1, 2010.**
- All radio listening includes listening via analogue AM/FM, DAB+ and the Internet.
- DAB+ digital radio services are still relatively new to listeners in metropolitan markets across Australia. These figures illustrate that the new platform has made a strong start and has already doubled the internet as a preferred platform for radio listening.

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Digital Radio Reach by age group



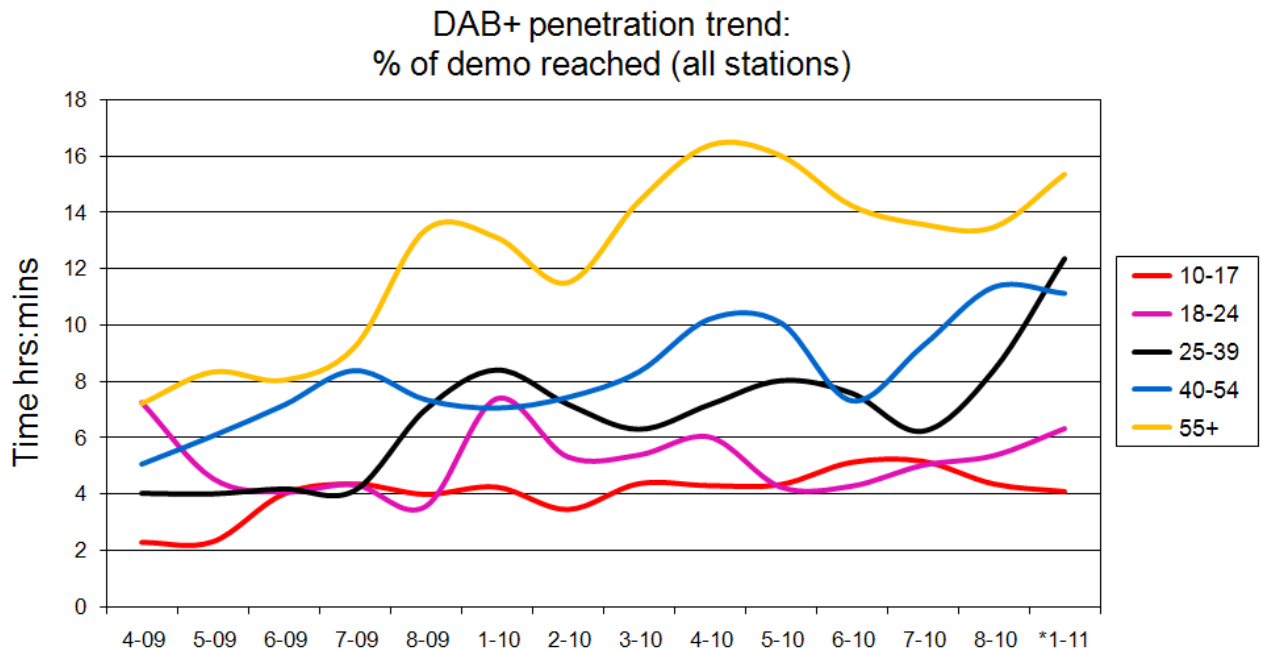
Source: The Nielsen Company Radio Ratings, cumulative figures, average of 5 metro markets Mon-Sun 5.30am to midnight, Survey #4, 2009 to Survey #1, 2011. * Brisbane Survey #8, 2010 was used with Survey #1, 2011 4 metro markets.

DAB+ digital radio reach into younger age groups is strong.

- Across the current survey in an average week, digital radio reached 5.4% of all people 10-17yrs, up 3.1% from Survey #4, 2009, followed by people 18-24yrs with a reach of 6.3%, up 5.2% from Survey #4, 2009.
- DAB+ digital radio reached 4.6% of all people 25-39yrs, (up 3.5% from Survey #4, 2009), while reach among people 40-54yrs and 55yrs+ was recorded at 6.3% and 6.8% respectively.
- Eighteen months on from the launch of permanent full power digital radio services all age groups recorded an increase in reach for DAB+ listening.

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Digital Radio Time Spent Listening by age group

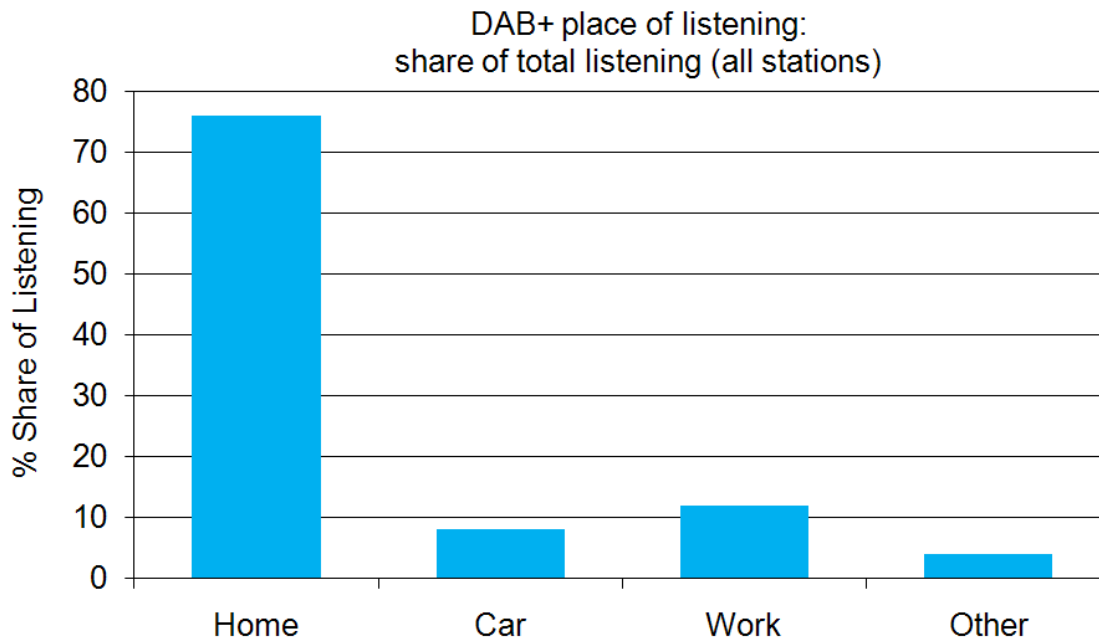


Source: The Nielsen Company Radio Ratings, time spent listening, average of 5 metro markets Mon-Sun 5.30am to midnight, Survey #4, 2009 to Survey #1, 2011. * Brisbane Survey #8, 2010 was used with Survey #1, 2011 4 metro markets.

- In the current survey time spent listening via the DAB+ digital radio platform was **11hrs 11mins in an average week**.
- Significant increases in time spent listening via a DAB+ device can be seen across all age groups from Survey #4, 2009 to the current survey.
- People 10-17yrs recorded time spent listening via a DAB+ device of 4hrs 10mins (up 1hr 41mins).
- People 25-39yrs recorded an increase in time spent listening via a DAB+ device at 12hrs 35mins each week, up 8hrs 31mins from Survey #4, 2009.
- Time spent listening to DAB+ digital radio among people 40-54yrs across the current survey was 11hrs 13mins, up 6 hrs 6 mins from Survey #4, 2009.
- People 55yrs+ recorded time spent listening via a DAB+ device at 15hrs 34mins in an average week, up 8hrs 12mins from Survey #4, 2009.

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Share of DAB+ Digital Radio Listening by Place



Source: *The Nielsen Company Radio Ratings, place of listening, Survey #1 – Survey #8 2010, Mon- Sun 12 am – 12am, SMBAP, people 10+.*

- Radio is a highly portable and flexible medium accessed in a variety of ways. The portability of radio allows it to reach an audience on the go – at work, driving, shopping and at home.
- In the current survey the majority of DAB+ digital radio listening occurred at home, 76%.
- Out-of-home DAB+ digital radio listening in the current survey was equally divided across Work (12%), Car (8%), and Other locations (4%).

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New DAB+ Only Stations on the Digital Radio platform

There are up to 20 new DAB+ only stations in each of the five mainland capital cities broadcasting digital radio. With additional pop up or event stations created for short time periods. Commercial and public broadcasters are also re-broadcasting their analogue stations on the DAB+ platform.

DAB+ Radio Stations	Format
Aussie Digital	All Australian, all the time
Barry	Comedy
The Buckle	Modern country music
Classic Hits Plus	Showcasing the biggest and most popular artists
Classic Hits Live	The world's biggest artists live
Hot Country	Australian and international country music
Top Country Digital Darwin	The world's hottest country music
The Crack	Great comedy, great music and great radio
The Edge Digital	R&B, hip hop and dirty pop
Gorilla Super Digi	Dance and club hits
Koffee	A chill and lifestyle station
The Main Stage	Celebrating big music events as they happen
My Canberra Digital	Smooth selection of favourites from the 70's to today
My MP	Easy music
My Perth Digital	Smooth selection of favourites from the 70's to today
NovaNation	24/7 dance music station
Radar Radio	Only the best new music
RadioTAB Darwin	Racing and sport
Sky Sports Radio 2	Sports programming including racing & soccer
Sky World	Racing from around the world
Zoo Super Digi	Smooth hits from the 80's, 90's and today
4TAB Digital 2	Special programming and RadioTAB simulcast
Pop Up Stations	Including; 4 TABHelp, U20, Elf Radio, Choose the Hits, Radio GaGa, I See Red Radio, Caravan of Courage, Pink Radio, High Voltage, ACDC.
Public Broadcasters	Various

Consumer Research

The Hoop Group was commissioned in late 2010 to undertake comparative research into consumer attitudes to, and awareness of, DAB+ digital radio to follow on from a comprehensive consumer awareness study undertaken by Hoop Group in late 2009.

Research objectives were to:

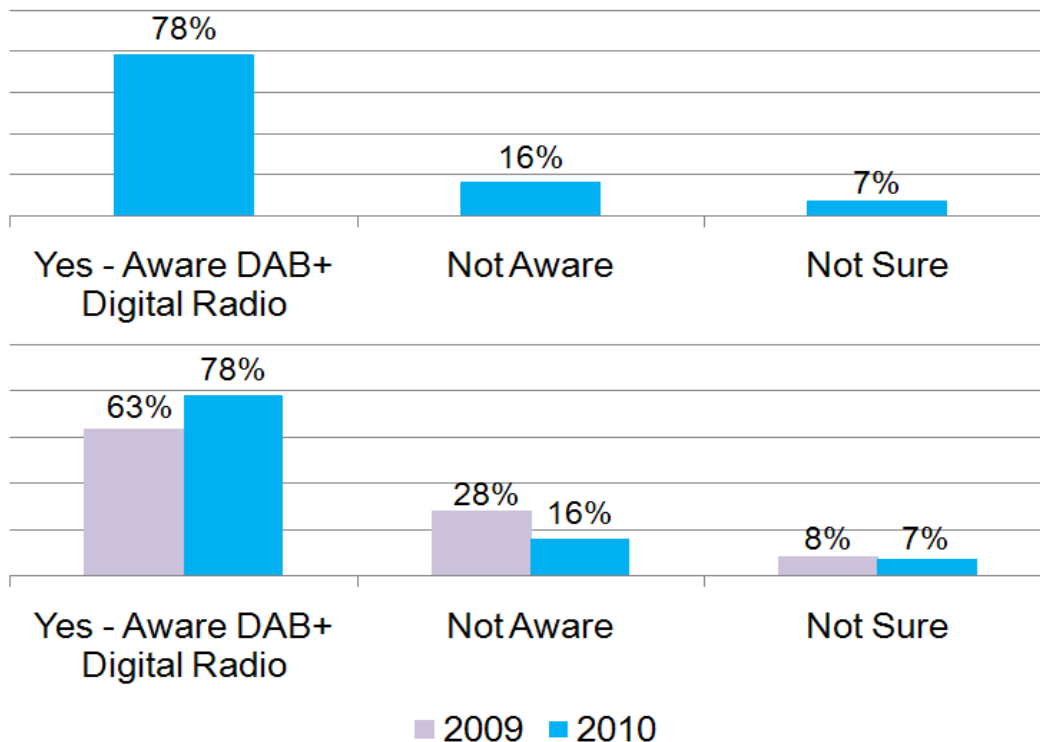
- measure levels of awareness amongst radio listeners
- define awareness and perception of the DAB+ digital radio brand
- identify purchase intent and key purchase triggers
- gauge user experience and perception
- compare findings of the first consumer research study (commissioned late 2009) against late 2010 results.

Hoop Group surveyed 1,008 metropolitan radio listeners; of this sample 18% of respondents indicated they had a DAB+ digital radio- significantly higher than 2009 results of 3% ownership.

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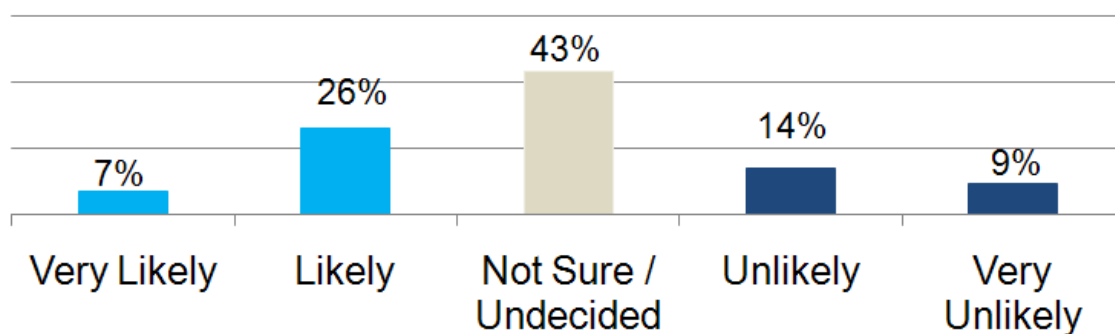
Awareness

- **78%** of the respondents were aware of DAB+, this was up from **63%** at the beginning of 2010 (a **24% increase over the year**).



Source: The Hoop Group CRA DAB+ Study December 2009 and 2010.

Purchase Intention



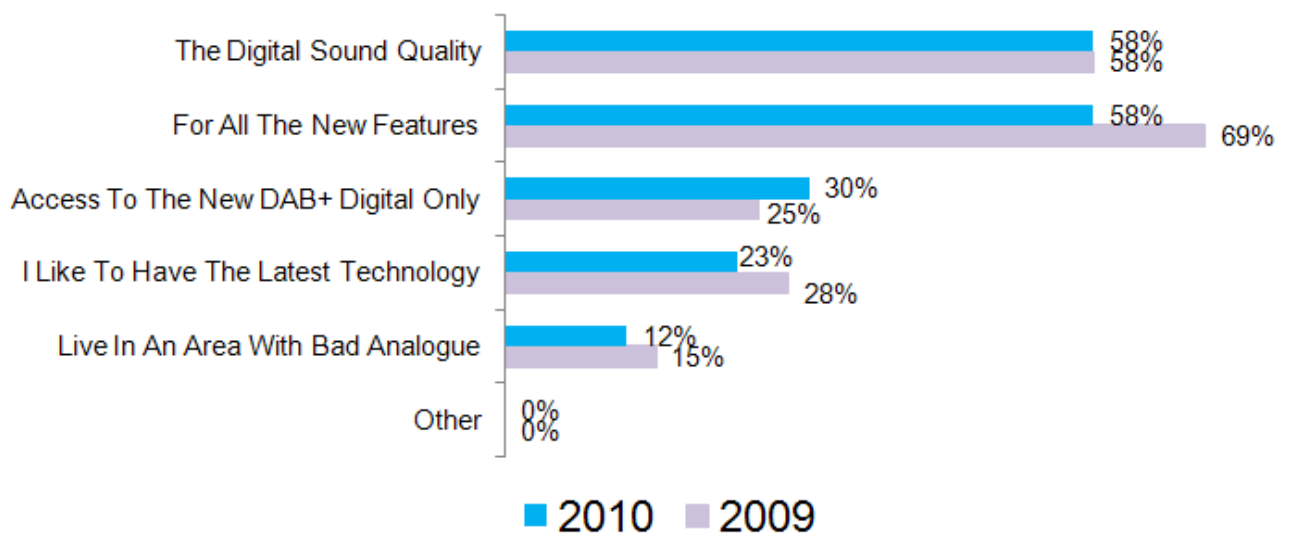
Source: The Hoop Group CRA DAB+ Study December 2009 and 2010.

While a **third (33%) of people** in metropolitan areas are likely to purchase a digital radio in the **next 12 months**, **43% are undecided** and can be targeted by industry marketing and promotional activity.

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Top reasons to purchase a digital radio in the next 12 months:

- Digital sound quality and the new features are generating interest among consumers, with these being the most important benefits for people when deciding to purchase.
- There has been a 5% increase in the number of people wanting access to digital radio only stations.



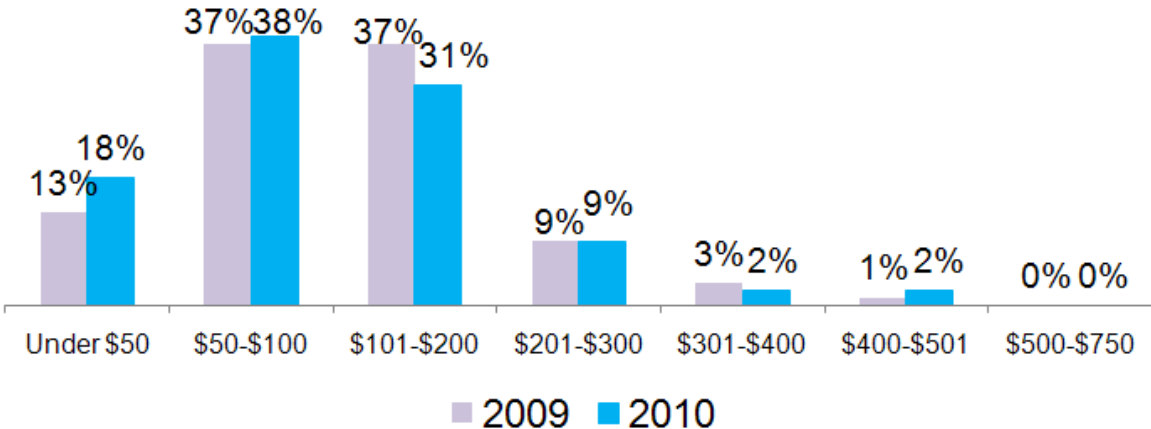
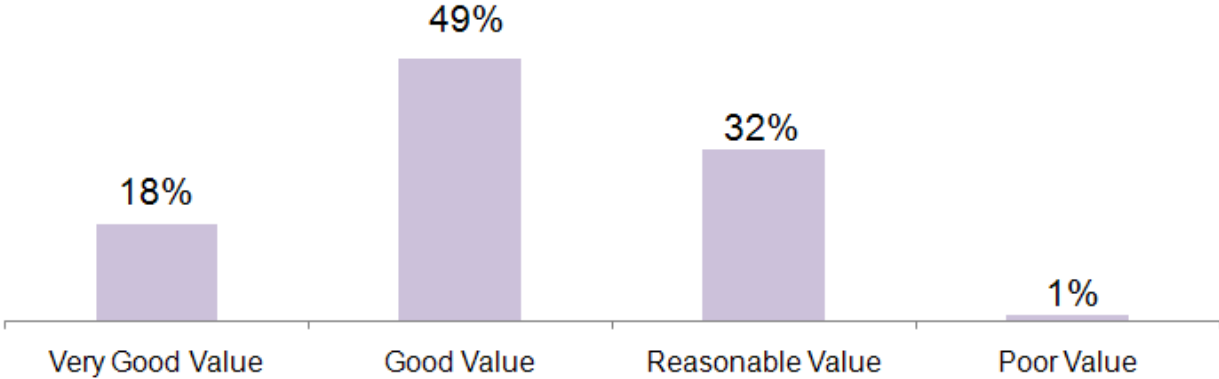
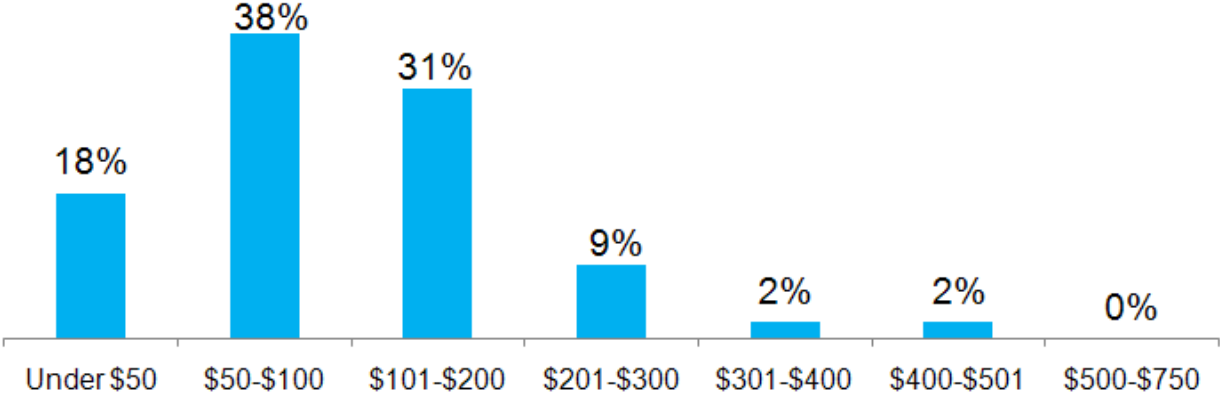
Source: Hoop Group CRA DAB+ Study December 2010, n=1,008, metro markets. People 18+.
Hoop Group CRA DAB+ Study December 2009 / January 2010, n=1,975, metro markets. People 18+.
Hoop Group CRA Top Line Digital Study 2010 n=156 Sydney, n=140 Melbourne, n=104 Brisbane. People 18+.

Price Perception

- In March 2011, there are more than **80 DAB+ digital radio models** available for sale in Australia up from **50 models** on the market in March 2010.
- Models include MP3 & MP4 devices, radios with slide show and touch screen, clock radios, table tops with iPod docks, Hi Fi components, portable players, clock radios, WiFi and DAB+ combinations and in car adaptor and aftermarket car radios.
- Digital radio prices vary greatly depending on features and capabilities. In Australia entry-level receivers can start from around AUD\$49, while a receiver with all digital features and wi-fi connectivity may cost up to AUD\$800.
- The Hoop research shows that the average price consumers expect to pay for a DAB+ digital radio is \$118. All respondents believed that the price they expected to pay was reasonable/good/very good value with **69%*** of people are **willing to spend between \$50-\$200** for a DAB+ digital radio device.

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Price Perception



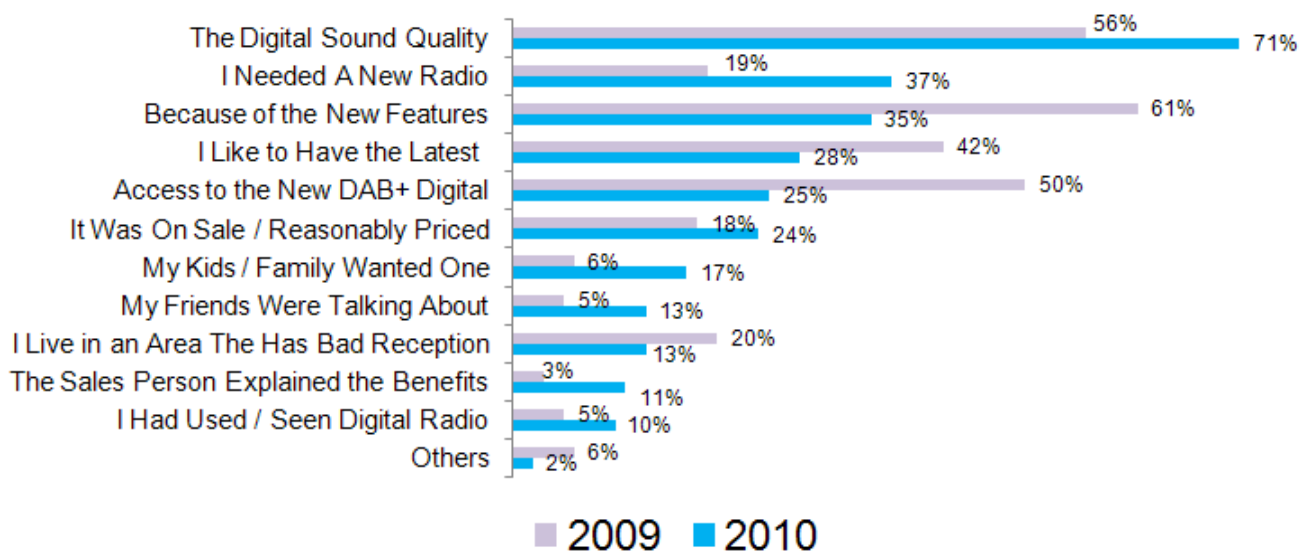
Source: Hoop Group CRA DAB+ Study December 2009 and 2010.

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Owners of DAB+ digital radios

- **49% of all people** who own a digital radio **listen to more radio**, with 59% of digital radio owners listening to their digital radio everyday.
- **87%** of people who own a digital radio **would recommend it to a friend**, that is an increase from 80% of the respondents in 2009.
- The reasons for purchase had changed a little since the initial research in 2009. The 'early adopter's' were more likely to have already purchased and now the reasons to purchase are more mainstream i.e Sound quality, new stations and if we buy a new radio it will be a DAB+ digital receiver.

Digital radio owners reasons for purchase:



Source: Hoop Group CRA DAB+ Study December 2009 and 2010.

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Market Data

Digital radio market data has been captured by consumer durables market research company, GfK. The DAB+ Marketscope report incorporates retail sell in and sell through data.

Marketscope figures for DAB+ devices, show that the total number of units in the market at the end of **January 2011** is **406,012**.

When compared to 2009 (July09-Dec09), there was an increase of 185% in 2010/11 (Jan10-Jan11).

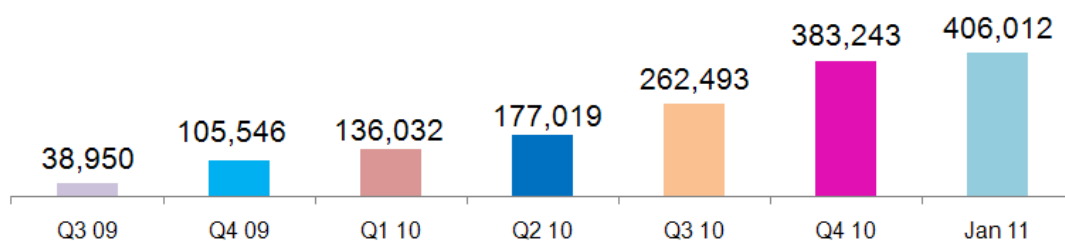
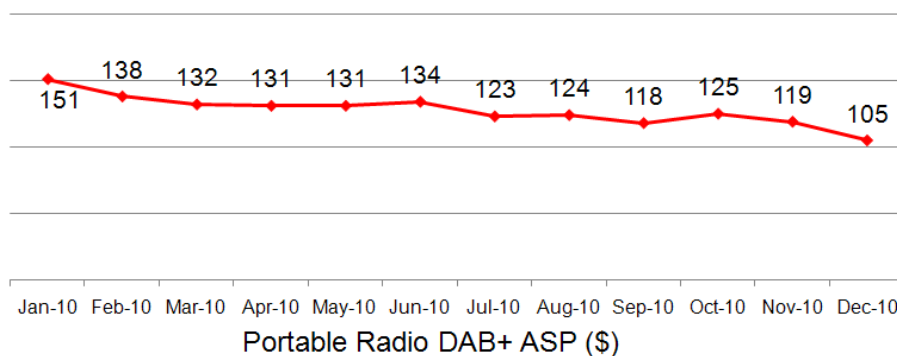


Chart: Cumulative DAB+ device sales Q3 2009 to January 2011.

NB: It is important to also note that no car radios or in-car adaptors are included in the figures provided in the Marketscope Report, nor any DAB+ devices sold through online sellers. 'Portable radios' for the purpose of the Marketscope report includes all DAB+ radio devices.

Price Progression



Source: GfK Retail and Technology Australia, Portable Radios, DAB+ only, Retail Sales Average Price, Jan 2010 to Dec 2010 (excludes internet and online channels)

The **ASP** (average sales price) for DAB+ Portable Radios has **fallen by 31% to AUD\$105** in the last 12 months.

Digital Uptake Forecast

The commercial radio industry commissioned PwC in August 2010 to undertake an analysis on potential household uptake of DAB+ digital radio technology in Australia. Under the diffusion path that has typically applied to household technologies in Australia, PwC predicted that digital radio uptake in households would be in the order of **16% by June 2014**.

PwC based the forecast on:

- early DAB+ sales (May 2009 to August 2010)
- Australian household uptake of other household technologies.

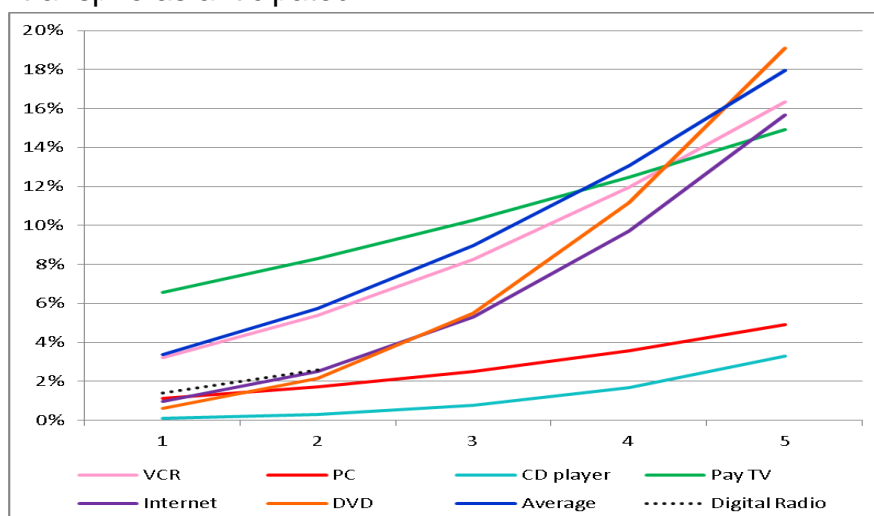
PwC also considered the:

- rate of digital radio adoption in other countries
- additional impetus to growth afforded by regional roll out

Adoption Forecast

- Analysis of digital radio sales as at August 2010 posited that DAB+ was then still in the stage of reaching innovators and early adopters.
- All else being equal, an increase in the growth rate of sales over the coming year is expected compared to the previous year as DAB+ digital radio reaches an early majority stage.
- The rate of adoption for digital radio appears to be following a curve comparable to that of internet adoption by Australian households.

Forecasts at this early stage must be accompanied with a reminder that likely future events are by their very nature difficult to predict and no warranty is given that actual events will transpire as anticipated.



Source: PwC Analysis of Digital Radio Adoption November 2010.
PwC Entertainment & Media Outlook Report 2010-14.

Priorities for the Future

The commercial radio industry has a number of priorities for the next 12 months for the continued success of DAB+ digital radio in Australia.

These include:

- building awareness and sales of DAB+ devices in metropolitan areas
- continuing effective marketing and joint promotions with retailers and manufacturers; addressing technical issues in metropolitan areas such as black spots through the rollout of the on-channel repeater (OCR) solution
- rollout of digital radio services outside of metropolitan centres and into regional Australia
- integration of DAB+ digital radio into vehicles
- encouraging population centres outside of Australia in the Asia Pacific to adopt DAB+ digital radio technology to assist in the promulgation of reasonably priced DAB+ devices.

The industry has made significant progress in the regional rollout and integration of DAB+ into vehicles.

Regional Rollout of DAB+

- Although current DAB+ markets cover nearly 60 percent of Australia's population, the five metropolitan capitals represent just five of the 105 commercial radio licence areas. National rollout and consumer uptake of DAB+ is important for broadcasters but also for retailers and car manufacturers.
- CRA has formed a DAB+ Regional Rollout Working Party comprised of regional broadcasters.
- Low power DAB+ trials have been switched on in Canberra and Darwin.
- In October 2010, Senator Conroy announced that the Government had identified that 14 MHz of VHF Band III spectrum would be made available to facilitate the rollout of digital radio to rural and regional Australia.
- In late 2010 the Australian Communications and Media Authority (ACMA) commenced the formal planning and consultation process for the digital TV restack and the subsequent planning for digital radio rollout and this is ongoing.
- This year the industry will begin exploring necessary funding for the regional rollout before commencing discussions with the Federal Government.

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DAB+ Devices into Cars

- Progress with the integration of DAB+ into vehicles has been positive in the last 12 months.
- Rapid expansion has occurred in the supply of DAB+/FM/AM digital radio aftermarket products with three models from Bluestate, Crystal and Philips available with further product due to be released this year. Specialist automotive retailers such as Repco, Supercheap and Autobarn are now ranging DAB+ aftermarket product.
- Multi standard automotive chips have been developed supporting DAB, DAB+ and DMB, enabling leading European automotive brands to meet the 2013 mandate that all cars imported into France have a digital radio.
- Germany's announcement that it will rollout DAB+ will also support the introduction the into vehicles that are manufactured in Europe,
- To demonstrate how serious the radio industry is, leading commercial broadcasters have offered the automotive industry bonus airtime to those companies that integrate DAB+ into new vehicles. CRA has developed DAB+ automotive technical guidelines to assist the industry with field strengths and functionality.
- In 2010 CRA hosted two local automotive workshops and is planning another in the first half of 2011.

DAB+ International Growth

- Adoption of digital radio standards DAB, DAB+ and DMB-A continues to grow and the standards are now on-air in 40 countries across Europe & the Asia-Pacific.
- The continued uptake of digital radio worldwide has increased the market for digital radio manufacturers, and further encouraged the automotive industry to incorporate digital radio into new vehicles.
- Norway has announced January 2017 as the FM switch off date. DAB/DAB+ will replace FM and ensure at least 13 radio stations to 99.8% of the population.
- The UK, where digital radio listening now stands at 25% and is growing by 20% every year, have a target switch off of 2015.
- Germany has announced it will rollout DAB+ in 2011, prompting further interest in the introduction of DAB+ into vehicles that are manufactured in Europe.
- The French Government has legislated that by 2013 all cars imported to France must have a digital radio. The official standard in France is DMB-A. Radios able to receive DAB, DAB+ and DMB-A are already available.
- China has DAB as the industrial standard. Beijing Jolon, the main broadcaster in Beijing is working with CRA on a DAB+ Push Radio trial.
- Indonesia announced that the DAB family would be the official standard for digital broadcasting and that they would trial DAB+.
- Malaysia is working on a two year DAB+ trial and has previously run a DMB trial.

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- Singapore has had DAB transmissions since 1999 and has reached close to 100 percent coverage. Commercial broadcasts of DAB+ were also launched in 2008.
- Hong Kong has trialled and will rollout DAB+.

Full DAB/ DAB+ Service	Trial/ Test	Interest
Australia	Brunei	Austria
Belgium	Croatia	Canada
China	Hong Kong	Czech republic
Denmark	Ghana	Estonia
France	Indonesia	Greece
Germany	Hungary	India
Malta	Israel	Lithuania
Monaco	Ireland	Namibia
Netherlands	Italy	Russian Federation
Norway	Kuwait	Slovakia
Singapore	New Zealand	Slovenia
South Korea	Malaysia	Turkey
Spain	Portugal	
Switzerland	Poland	
Taiwan	Sweden	
UK	South Africa	
	Vietnam	

Report Sources

Listening Data

The Nielsen Company

- The Nielsen Company Radio Ratings, Average of 5 Metro Cities, Survey #1, 2009 to Survey #1 2011, place of listening, 530am-12midnight, all people 10yrs+ unless otherwise stated. Brisbane Survey #8, 2010 was used with S,M,A,P Survey #1, 2011.
- Nielsen Radio Ratings, Average of 4 Metro Cities, S, M, A, P, Survey #1, 2011 and Survey #8, 2010 Brisbane, Monday-Sunday 12am-12mn, place of listening, reach, time spent listening, share of listening, all people 10yrs+ unless otherwise stated.

Consumer Research

Hoop Group

- Hoop Group CRA DAB+ Study December 2010 n=1 008 National Metro Capital City Markets. People 18+.
- Hoop Group CRA DAB+ Study (Market) December 2009 / January 2010 n=1 975 National Metro Capital City Markets. People 18+.

Market Data

GfK - Market Scope Report

- The MarketScope data shown in this report has been modelled from a combination of sell-in data and an estimate for non-contributors to the sell-in service, based on sell-through data from the GfK retail tracking measurement.
- May 2009-Jan 2011.

GfK – Retail and Technology

- Retail tracking measurement – sell through data.

Mystery Shopper Project

HOED - Customer Experience Measurement Company.

- Research conducted in November 2010.
- 2nd Phase – March 2011.

Household Uptake Forecast

Pricewaterhouse Coopers

- PwC Analysis of Digital Radio Adoption November 2010.
- PwC Entertainment & Media Outlook Report 2010-14.