

Global Market Analysis and Strategic Outlook: 2009-2015

Digital Radio 2009

A Global Review of Digital Radio in 50 countries

A comprehensive report on digital radio development providing the latest information on the status and prospects of various digital radio technologies around the world

Includes:

- A comprehensive analysis of the prospects and key challenges facing the Eureka-147 platform over the next six years, including latest information on numerous multimedia services (and devices); developments in chipset technology; DAB/T-DMB receiver reviews; plus discussion of the issues and outlook for T-DMB mobile TV
- Comprehensive coverage of the digital radio market in the United Kingdom, including information on digital radio listening, services, multiplexes, receiver sales, and receiver availability plus latest information and analysis on industry, regulatory and government proposals and developments following UK DAB's 2008 "Annus Horribilius."
- A 120-page review of DAB around the world split by region: Europe (including eastern Europe), the Asia-Pacific region (including India and China) and the Americas. Review based on a comprehensive survey of digital radio developments and future plans in 50 countries
- A 70-page analysis of the prospects of Internet Radio, including an evaluation of Internet Radio portals, key technology developers, Wi-Fi enabled receivers and manufacturers, key business issues and forecasts
- A 165-page review of Digital Radio Mondiale (DRM) and HD Radio including latest information on new technology developments, chipsets and receivers; service roll-outs around the world plus a discussion of market drivers and key business and regulatory issues
- A global analysis of the satellite radio and mobile TV market split according to region: North America, Asia and Middle East and Europe including information on radio, mobile TV and data services, receivers and manufacturers, key issues plus outlook for individual players
- More than 150 interviews carried out in researching this report with: broadcasters, regulators, chipset manufacturers, network operators, receiver manufacturers, satellite companies, public organizations and institutions, trade groups (WorldDAB, DRDB, RadioCentre, DRM Consortium, iBiquity), etc.

Commercial radio around the world is facing bigger threats today than at any other time during the past five decades. New ways of consuming media, via the Internet or by MP3, has driven down radio's share of listening and advertising revenues.

Digital radio via the Eureka-147 platform can be used to offer a more compelling USP to its listeners and can offer a way for broadcasters to increase advertising revenues and generate new data-related revenue streams.

Over the next 5 years, the introduction of so-called "Screen Radios," essentially DAB radios with large touch-sensitive colour screens and Wi-Fi connected DAB radios could transform radio from an

audio-only listening experience to a completely multimedia experience, allowing listeners to access new features and services as well as enabling new business model opportunities for broadcasters.

In the US, HD Radio is grappling with the same problem. Technology developer Ibiquity has developed a raft of new technologies which will be integrated into HD receivers during 2009 and HD broadcasters are generating new revenues by selling HD data bandwidth to third party content providers.

The number of Eureka-147 based devices now exceeds 27 million and an increasing number of countries are expected to launch digital radio services us-

ing the Eureka-147 platform within the next two years. In South Korea, there are more than 16 million T-DMB mobile TV devices and broadcasters are partnering with mobile operators to offer a range of TPEG traffic services and interactive data services to mobile phones and vehicles.

Although the UK is still the leading DAB market in the world, adoption in other European countries is expected to add significantly to the installed base of devices during 2009-2015. The prospect of pan-European policy intervention with regards to the migration of radio to digital across Europe and the subsequent switch-off of analogue radio could greatly accelerate this process.

"Digital Radio 2009—A Global Review" is a 600 page, non-commissioned, independent report providing an objective analysis of the global digital radio market during the next 6 years

Some of the Key Business Issues addressed in this report include:

- When will the first DAB "Screen Radios" be launched?
- Which countries plan to license commercial DAB services in 2009-10?
- Has satellite radio well and truly "missed the boat" in Europe?
- Can DAB broadcasters and multiplex operators develop successful multimedia/data businesses?
- Are all subscription-based mobile TV services doomed to failure?
- Which countries have firm plans to launch Free-To-Air mobile TV services?
- Is Internet radio a threat or an opportunity for digital broadcast radio?
- Is there a market for DRM in Europe?
- Will 2009 be the year that HD Radio turns the corner in the US?
- Is satellite radio in the US (and elsewhere) doomed?
- Are TPEG and BIFS-based interactive data services generating revenues for Korean T-DMB broadcasters?
- Will the FCC sanction HD Radio transmitter power increases?
- What impact will new copyright rates have on the growth of Internet radio in Europe and the US?
- When will car manufacturers adopt the Eureka-147 platform en masse?
- Will DRM+ be the saviour of DRM?
- When will the UK adopt DAB+?
- Can terrestrial digital radio in Europe succeed without government intervention?
- How can broadcasters leverage the Wi-Fi Internet return-channel to develop new business models?
- What are the prospects of HD Radio deployment in Europe?
- How is Ibiquity changing its business model to penetrate markets outside the US?
- Will the FCC mandate HD Radio in all Sirius XM receivers?
- Which countries have set tentative dates for the switch-off of FM?

Report Contents

Part A: DAB

1. Executive Summary
2. An overview of DAB around the world
3. The mobile TV market
4. Chipset technology and vendors
5. Monetising DAB via multimedia
6. DAB/DAB+ receivers and manufacturers
7. T-DMB receivers and manufacturers
8. DAB country focus: the UK market
9. Key issues facing DAB radio & mobile TV
10. Growth prospects & forecasts (2008-2015)

Part B: DAB Countries

1. Overview of report
2. EMEA region (Austria, Belgium, Czech Republic, Denmark, France, Germany, Hungary, Ireland, Israel, Italy, Malta, The Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, Other countries (Croatia, Estonia, Finland, Ghana, Greece, Kuwait, Lithuania, Poland, Romania, Slovakia, Slovenia, South Africa, Turkey))
3. Asia-Pacific region (Australia, China, Hong Kong, New Zealand, Singapore, South Korea, Taiwan, Other countries (Brunei, India, Indonesia, Malaysia))
4. Americas region (Canada, Mexico, Other countries)
5. Appendices

Part C: Internet Radio

- Executive summary
1. Growth in Internet radio listening
 2. Review of current Internet radio portals (Vtuner, Reciva, Radeo, The Lounge, Frontier Silicon, Mi-Roamer, Radiopaq, etc.) and personalized radio portals (Pandora, Lastfm, Blog-TalkRadio, etc.)
 3. Key technology developers (Reciva, Bridge Co AG, Frontier Silicon, CSR (RadioPro))
 4. Receivers and manufacturers
 5. Key business issues and forecasts (2008-2013)

Part D: Digital Radio Mondiale (DRM)

- Executive summary
1. The DRM system
 2. DRM spectrum option & migration strategies
 3. Current DRM broadcasts
 4. DRM developments around the world
 5. DRM applications
 6. DRM chipsets
 7. DRM receivers
 8. Data over DRM and DRM+
 9. The DRM Consortium
 10. Challenges facing DRM

Part E: HD Radio

- Executive summary
1. The technology
 2. The United States market
 3. HD around the world
 4. New HD features
 5. HD chipsets
 6. HD receivers
 7. Traffic information via HD Radio
 8. HD Radio on AM
 9. The HD business model
 10. HD Radio shareholders & licensed vendors
 11. Regulation
 12. Key market drivers in the short-medium term
 13. Key issues facing HD Radio
 14. Forecasts

Part F: Satellite Radio

- Executive summary
1. North America (Sirius XM: Satellite radio content, Distribution channels, Non-audio services, Merger details; Canadian market; Satellite radio receivers and manufacturers, Key challenges)
 2. Asia and the Middle East (WorldSpace, MBSAT, Digital radio and mobile TV via ISDB-T, etc.)
 3. Europe (WorldSpace, Ondas Media; Spectrum & regulatory issues, Service launch plans, Chipsets and receivers, Automotive partnerships, etc.)

Companies and organizations discussed in this report include:

Atmel; Bosch Blaupunkt; BLM; BBC; Chengdu NewStar Electronics; Coding Technologies; CSR; DRDB; Danmarks Radio; Deutsche Welle; Digital One; DIS Technology; EBU; Factum Electronics; Fraunhofer IIG; Frontier Silicon; Gcap Media; Imagination Technologies; Intempo Digital; iBiquity; KBS; LG Electronics; MBCo; MediaCorp. Radio; Mirics; Nokia; NDS; NHK; NRK; NXP Semiconductors; Ofcom; Pandora; Panasonic; PersTel; Polk Audio; Philips; Pure Digital; RadioScape; Reciva, Revo Digital; Roberts Radio; Samsung; Sangean; SARFT; Sirius XM; SiPort; SK Teletech; Sony; SSR; ST Microelectronics; Swedish Radio, TDF; Texas Instruments; TTP; TU Media; Unique Interactive; VDL; VT Communications; WorldDMB; WorldSpace

Who should buy this report?

Radio and TV broadcasters; network operators; broadcast infrastructure manufacturers; chipset developers; receiver manufacturers; mobile operators; mobile phone manufacturers; software and content providers; policy developers; regulators; advertising agencies; trade organisations, etc. who want:

- The most detailed and up-to-date review of DAB digital radio around the world, including details of regulatory developments, up-and-coming trials and commercial services
- To learn about the latest innovative multimedia and data applications being developed for the Eureka-147 platform around the world and how they can be used to increase advertising revenues for broadcasters and generate new revenue streams for multiplex operators
- To understand the future prospects of Internet radio and how it can be positioned as a complement to terrestrial broadcast technologies rather than a threat
- To understand the capabilities and prospects of alternative digital radio standards such as DRM/DRM+ and HD Radio and their impact on DAB deployment around the world
- Detailed 6-year forecasts of digital radio growth broken down by geographical region and by technology, including T-DMB mobile TV forecasts

About Eureka Research

Eureka Research is an international market research and consulting organization specializing in digital radio and mobile multimedia broadcasting technologies and services.

Set-up by a number of ex-Gartner analysts, it has a presence in Europe and in the US.

Since its formation in late 2003, Eureka has published a number of comprehensive reports and carried out numerous consulting assignments on digital radio via DAB and other technologies such as DRM, HD Radio, Internet radio and satellite radio.

About the author

Gareth Owen is a Research Director at Eureka Research. Prior to setting-up Eureka in 2003 he was an analyst at the Gartner Group for 6 years and specialized in mobile data and broadcasting technologies and services. He has also worked for many years as an R&D engineer on research contracts for the European Space Agency which culminated in a Research Fellowship at ESA's research and technology centre in Holland.

He has a combined B.Sc. (Hons) in Engineering and German, a Ph.D in Control Engineering and an MBA in Innovation, Strategy and Information Technology.

Roll Up! Roll Up!
Get your recession-beating bumper edition now—
whilst stocks last !!!

Pricing options for this report:

Complete 600 page report:

- Single-user license @£1,950/€2,100
- Site-license @£2,450/€2,700*
- Global license @£3,000/€3,200*
- Paper copy @£2,500/€2,750

* Special offer price until end April 2009 (see "Prices" document)
N.B. Euro prices are shown for guidance only

To order please contact sales on:

Tel: +44 1248 364 281or
Tel: +44 784 165 2086 or
e-mail: sales@eureka-research.com

Address: 13, Victoria Park, Bangor,
Gwynedd, Wales, United Kingdom

Please note: VAT at 15% is payable on orders from the UK. No VAT charged on companies in EU - provided VAT number is provided with order.

www.eureka-research.com