

INSTALLATION FEATURES – ITS IN YOUR VEHICLE

Cars and the Digital Radio Switchover

19 May 2011

Bob Davis
Digital Radio Co-ordinator
SMMT

CONTENTS

- Digital Britain Report
- Digital Radio Action Plan
- Approved Installation Working Group
- Market size and segmentation

DIGITAL BRITAIN REPORT

- Digital radio switchover – 2015?
- Criteria
 - listening – 50%
 - coverage – comparable to FM
- Automotive
 - new vehicles – by end 2013
 - parc - majority converted before 2015
 - low-cost convertors for others
- Digital Economy Act 2010

DIGITAL RADIO ACTION PLAN

- ‘To provide the information to allow for a well-informed decision by government on whether to proceed with a Digital Radio Switchover’
- Automotive issues delegated to In-Vehicle Sub-Group
- 7 Working Groups including
 - Minimum specification for radios and adapters
 - Antenna/receiver sensitivity levels
 - Approved installation
 - Consumer advice

APPROVED INSTALLATION WORKING GROUP

Requirements

- Ensure conversion specification are developed which allow car dealers and retailers to develop installation services
- Report on the need and mechanisms for training approved installers of DAB in-vehicle receivers with external aerials.

APPROVED INSTALLATION WORKING GROUP

Progress

- Routes to market identified
- Skill sets identified

Outstanding questions

- Training/accreditation scheme
 - is it needed
 - is there time to develop one
- Use of Digital Radio 'tick' mark

DIGITAL RADIO 'TICK' MARK

- Formal name: The Digital Radio Certification Mark
- Signifies goods and services designed to work through a Digital Radio Switchover
 - 'Goods' include retro-fit devices and adapters for vehicles
 - 'Services' may include 'Registered Installers'



MINIMUM SPECIFICATION FOR RADIOS AND ADAPTERS

- Functional specification drafted
- Outstanding questions
 - implementation guidelines for broadcasters
 - testing of adapters
 - use of Digital Radio 'tick' mark

ANTENNA/RECEIVER SENSITIVITY LEVELS

- Outstanding questions
 - grading scheme for antenna
 - criteria
 - would this suit motorists?
 - test regime for antennas

THE CAR PARC

Parc @ 31.12.2010

Total parc: 31,258,197

Age profile:

2007 onwards	8,463,749
2002-2006	12,077,412
1995-2001	9,289,318
Pre-1995	1,427,798

Digitally-enabled as OE (est.) 0.5m -1.0m

Registration forecasts:

2011	1.93m
2012	2.01m

Source for all figures: SMMT

THE CAR MARKET

Market segmentation

Market can be segmented by technology and age:

- Universal 1-DIN (cars up to 2002)
Traditional 'head unit' market
- Vehicle-specific Head Unit (cars 2002-2007)
Replaceable head unit with vehicle-specific shape and functions (e.g. steering wheel controls, external display)
- Distributed infotainment (cars 2007 onwards)
Audio, media, navigation, communication, telephone functions (in any combination), distributed between non-replaceable control modules, displays and buttons.

N.B. 2002 and 2007 are approximate break-points. There were earlier or later adopters of new technology.

THE CAR MARKET

Features of the market segments

1-DIN

- trade-off between the age of the car (minimum 12 years by 2014) and its value (£500 - £2,000) and the cost of a retro-fit radio

Vehicle Specific Head Unit

- part of the 1-DIN 'head unit' market but needs additional accessories
- £100 - £150 price range, including cost of accessories and 'free' fitting, is probably acceptable
- probably no increase in the present market – 0.5m -1.0m units sold per year

Distributed infotainment

- unsuitable for replacement radios
- adapters the only solution
- likely to demand integrated adapters, to preserve the internal appearance

ISO 1-DIN (ADAPTER) HARNESS



Fiesta	Astra	Golf	3-Series	E Class
				
>2002	>2004	>2004	>1999	>2002

VEHICLE-SPECIFIC HEAD UNIT

Fiesta Mk V 2002-2008	Astra H 2004-2009	Golf Mk V 2005-2009	3-Series E46 1999-2004	E Class W211 2002-2009
				
				



Stalk Adaptor
CAN BUS

DISTRIBUTED INFOTAINMENT



Thank you for listening.

QUESTIONS?

For further information, contact
Bob Davis
Telephone: 020 7344 9235
Email: bdavis@smmt.co.uk