

DAB/DAB+ DIGITAL RADIO AUTOMOTIVE | EUROPE AND ASIA PACIFIC

(at year end 2014)



Across Europe, radio is moving to digital - auto manufacturers should provide digital radio as standard on all models in countries that are committing to a digital radio future.

Digital Switchover is firmly on the agenda in Europe: Norway will switch off FM in 2017; Switzerland will switch-over in 2020-24. Denmark and Germany have started discussions on the future of FM, and the UK is planning for a digital future.

Network coverage is now over 90% of the population in the UK, Switzerland, Norway, Denmark, Germany and the Netherlands; coverage in Italy is already 65%.

New cars: in the UK 61% of new cars sold have DAB as standard, and in Norway over 60% of new cars sold have DAB/DAB+ fitted. In Switzerland, the figure is 45%; in Germany it is 10% - and rising.

Developing markets: networks are being extended in France, Italy and Poland; DAB+ starts in Flanders this spring; a DAB+ trial is expected in Austria this year; and in Sweden a Digital Radio roadmap (with DSO in 2022-24) will be voted on by Parliament in Q4 2015.

Government policy status:

Norway – DSO confirmed for 2017 | **United Kingdom** – Government commitment to digital future for radio. Switchover criteria likely to be met in 2017 for Government review | **Switzerland** – broadcast industry has proposed DSO 2020-2024 | **Denmark** – DSO when 50% listening is digital, transition to DAB+ by end 2016 | **Germany** – committed to DAB+ | **Netherlands** – National stations started on DAB+ in 2013. Regional stations will start in 2015 | **Italy** – regulator has announced 3 new licence areas. | **France** – 3 cities on air, regulator has proposed further cities | **Australia** – DAB+ launched in 5 metropolitan areas 64% population. Regional coverage under discussion.

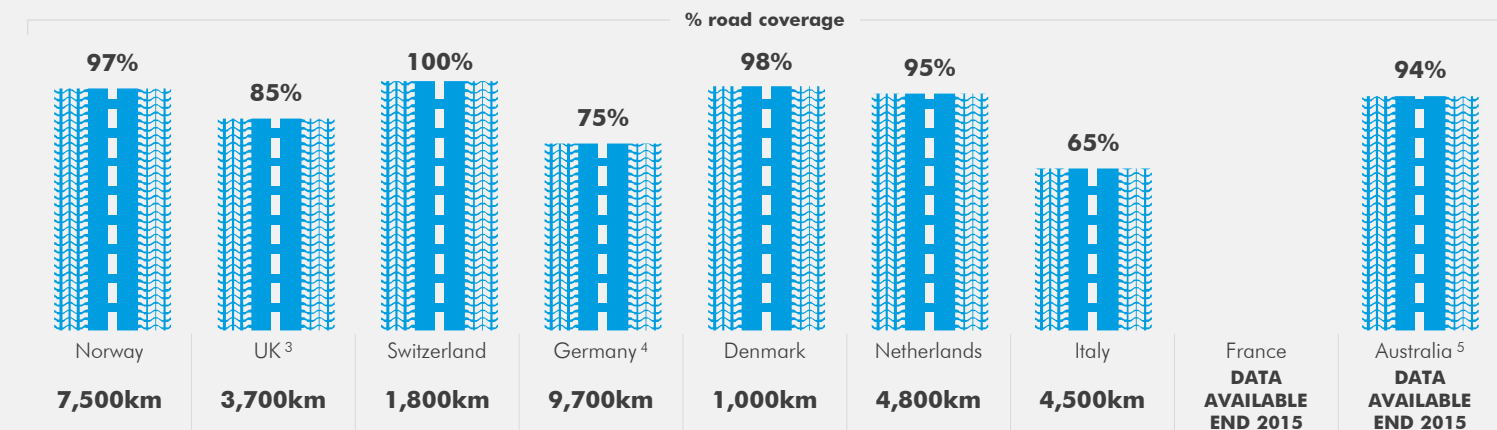
% NEW CARS WITH DAB/DAB+



¹ Industry estimate. | ² Approx 1m sold each year in Australia.

Sources: Digitalradio Norge, SMMT/CAP automotive, MCDT (Switzerland), Verband der Automobilindustrie (VDA), digitalradio.it, Commercial Radio Australia.

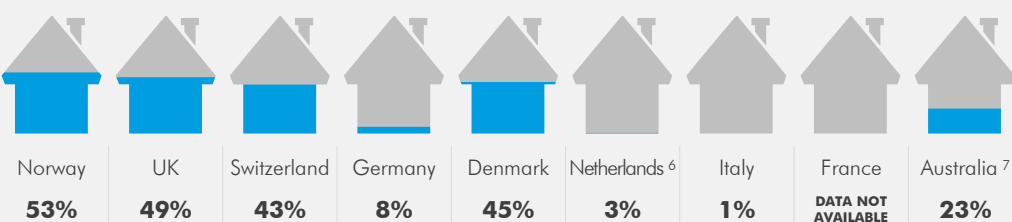
DAB/DAB+ 1st LEVEL ROAD COVERAGE *



Sources: Digitalradio Norge, Digital Radio UK, MCDT (Switzerland), Media Broadcast, Teracom, Ministry of Foreign Affairs of Denmark, WorldDMB, digitalradio.it, Commercial Radio Australia.

* KM 1st level road coverage (motorways, autobahns, autobahns, autostrade, autostradas, autoroutes). However most countries also have equivalent coverage on 2nd level routes. | ³ BBC National. | ⁴ National mux only, regional muxes provide further coverage. | ⁵ Road coverage of the five metropolitan cities with DAB+.

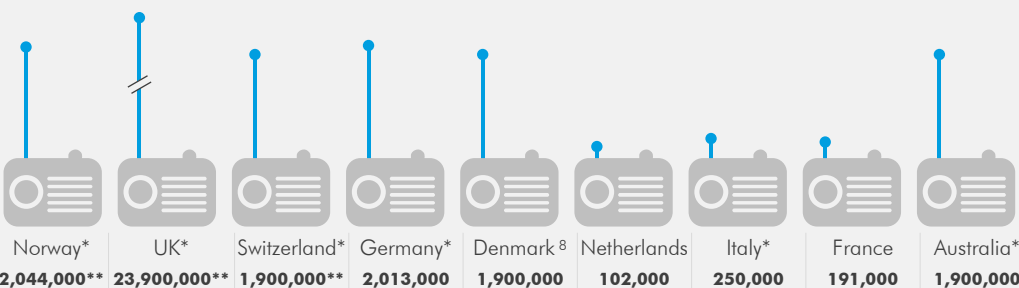
DAB/DAB+ HOUSEHOLD RECEIVER PENETRATION



⁶ Listening time. | ⁷ Refers to major metropolitan areas.

Sources: Digitalradio Norge, RAJAR, MCDT (Switzerland), Digitisation report 2014 carried out by TNS Infratest, TNS Gallup (Denmark), Telecompaper report for Agentschap Telecom (Netherlands), digitalradio.it, Commercial Radio Australia, Glass's Automotive Business Intelligence 2014.

CUMULATIVE DAB/DAB+ RECEIVER SALES (DOMESTIC AND AUTOMOTIVE)



⁸ Excludes scrap units.

*Including line fit automotive.

**Including pre 2008 sales.

Sources: Digitalradio Norge market research, GfK (UK), SMMT/CAP automotive, MCDT (Switzerland), GfK (Germany), Estimate from Branchen ForbrugerElektronik, digitalradio.it, GfK (Netherlands), GfK (France), Commercial Radio Australia, GfK (Australia), Glass's Automotive Business Intelligence 2014 (Australia).

DIGITAL RADIO MARKETING BODIES

Norway – radio.no | United Kingdom – getdigitalradio.com | Switzerland – digitalradio.ch | Denmark – digitalradio.dk | Germany – digitalradio.de | Italy – digitalradio.it | Netherlands – digitalradio.nl | France – Alliance for Digital Radio | Australia – digitalradioplus.com.au