

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

(year end 2015)



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

Digital Switchover

Norway switches off FM in 2017; Switzerland in 2020-24. Denmark and Germany have started discussions on the future of FM, and the UK is planning for a digital future.

90%+ network coverage

in UK, Switzerland, Norway, Denmark, Germany and the Netherlands; coverage in Italy 70%.

80% New cars

sold in the UK have DAB as standard. 65% Switzerland, 63% Norway and 13% of drivers in Germany choose DAB - and rising.

Developing markets

networks extended in France, Italy, Netherlands and Poland; DAB+ started in Flanders in 2015; trials started in Austria, Czech Republic, Turkey and Slovakia; a license for the first national DAB+ multiplex awarded in Slovenia in 2015.

Government policy support

Norway – DSO confirmed 2017 | **United Kingdom** – Government commitment to digital radio | **Switzerland** – DSO 2020-2024 | **Denmark** – DSO when 50% listening is digital, transition to DAB+ by end 2016 | **Germany** – committed to DAB+ | **Netherlands** – Fastest DAB+ growth with Gov. support | **Italy** – regulator frequencies planned for local DAB+ in 39 specific areas | **France** – 3 cities on air, a timetable announced for deployment of DAB+ across France (40 licences and local licences) | **Australia** – DAB+ in 5 metropolitan areas 65% pop. Regional planning started.

% NEW CARS WITH DAB/DAB+¹



¹ All figures standard fit except Germany and Italy which also includes cars with DAB+ taken as an option.

Sources: JATO Dynamics 2015 (Norway, Denmark, Netherlands, France), SMMT/CAP automotive Q4 2015 (UK), MCDT (Switzerland), DAT/VDA (Germany, data from interviews with new car buyers Apr - Jun 2015) (Germany), digitalradio.it estimate (Italy), Glass's Automotive Business Intelligence Sep 2015, Commercial Radio Australia (Australia)

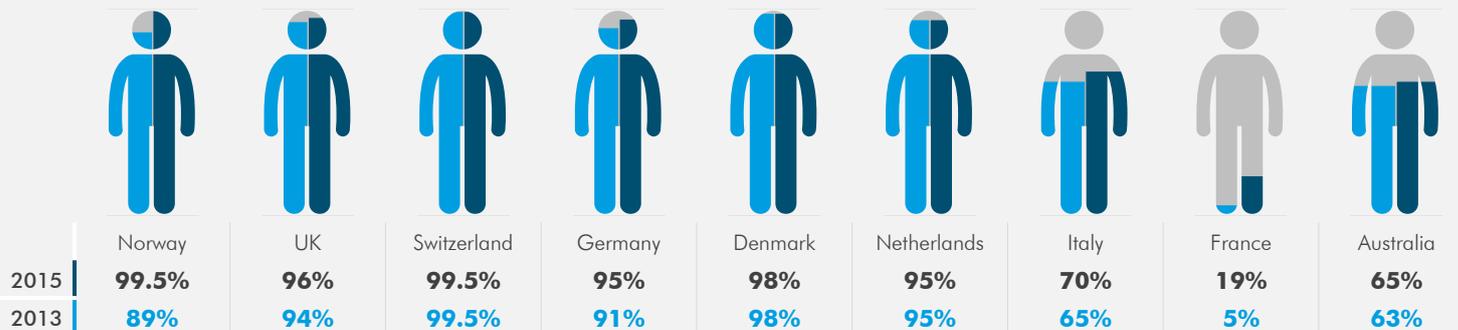
DAB/DAB+ 1st LEVEL ROAD COVERAGE *



Sources: Digitalradio Norge (Norway), Digital Radio UK (UK), MCDT (Switzerland), Media Broadcast (Germany), Teracom (Denmark), Digital Radio NL (Netherlands), WorldDAB (France), digitalradio.it (Italy), Commercial Radio Australia (Australia)

*KM 1st level road coverage (motorways, autobahns, autostrade, autostradas, autoroutes). However most countries also have equivalent coverage on 2nd level routes. | ⁴ BBC National | ⁵ National mux only, regional muxes provide further coverage. | ⁶ Road coverage of DAB+ area covered in five metropolitan capital cities

TOTAL DAB/DAB+ NETWORK COVERAGE (% OF POPULATION) 2013 VS 2015



Sources: Digitalradio Norge (Norway), Digital Radio UK (UK), MCDT (Switzerland), WDR (Germany), Media Broadcast (Germany), Teracom (Denmark), Digital Radio NL (Netherlands), digitalradio.it (Italy), TDF (France), Commercial Radio Australia (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