

DAB/DAB+ DIGITAL RADIO| EUROPE AND ASIA PACIFIC

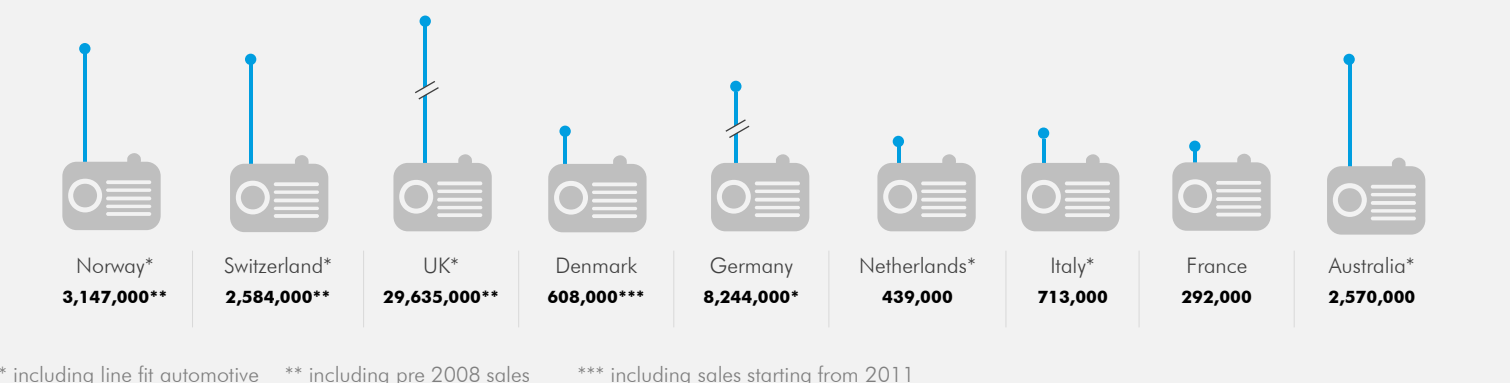
(Q2 2016)



Government policy status

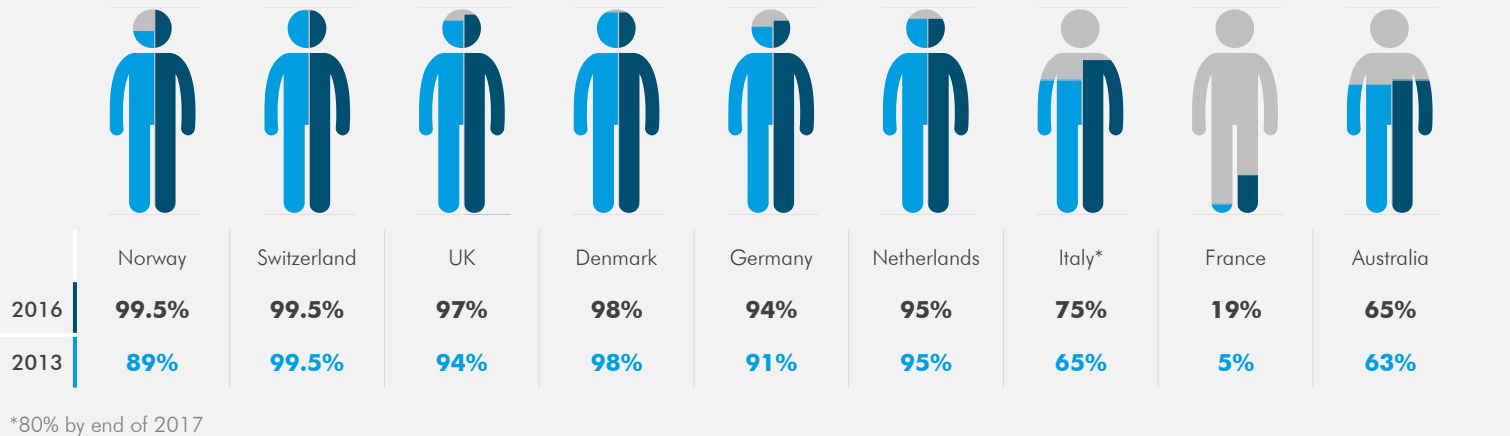
**Norway** – DSO confirmed 2017 | **Switzerland** –DSO 2020-2024 | **United Kingdom** – Government committed to digital future for radio | **Denmark** – timing of DSO to be decided when 50% of listening is digital| **Germany** – authorities drafting a roadmap to Digital Switchover (for consultation) | **Netherlands** – fastest DAB+ launch, backed by Government support | **Italy** – national coverage to reach 80% by end-2017 | **France** – three cities on air, timetable announced for deployment of DAB+ across France (40 licences and local licences) | **Australia** – DAB+ in 5 metropolitan areas 65% population coverage; regional planning started.

CUMULATIVE DAB/DAB+ RECEIVER SALES (INCLUDING LINE FIT AUTOMOTIVE)



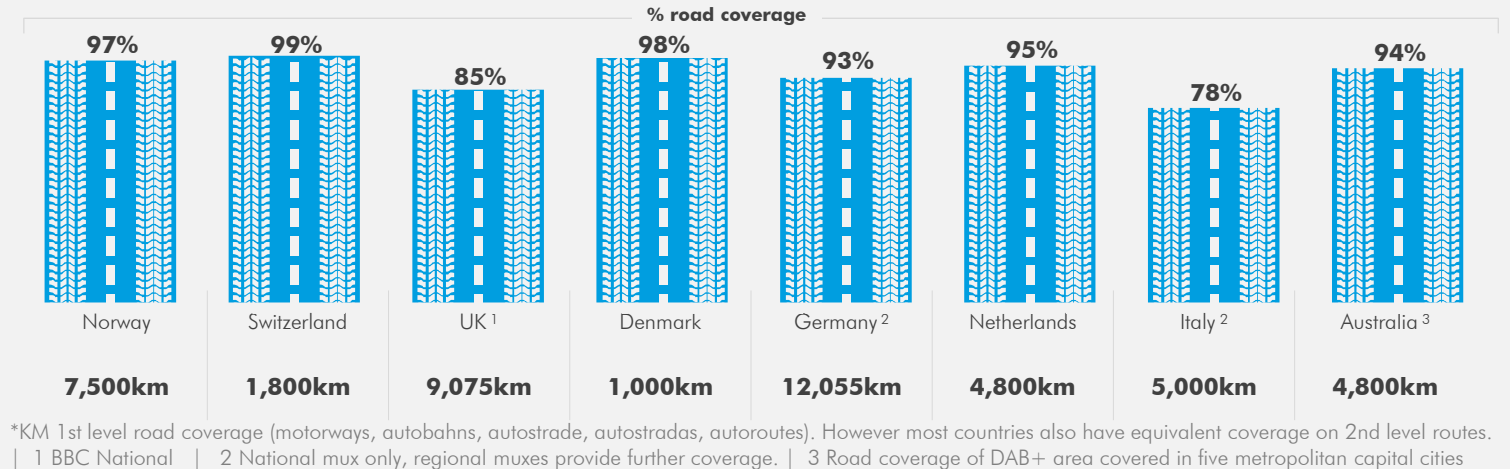
\* including line fit automotive \*\* including pre 2008 sales \*\*\* including sales starting from 2011

TOTAL DAB/DAB+ NETWORK COVERAGE (% OF POPULATION) 2013 VS 2016



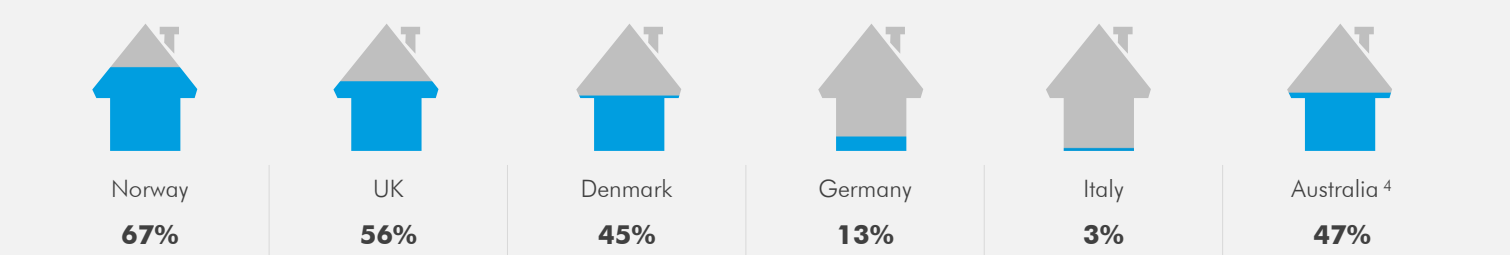
\*80% by end of 2017

DAB/DAB+ 1st LEVEL ROAD COVERAGE \*



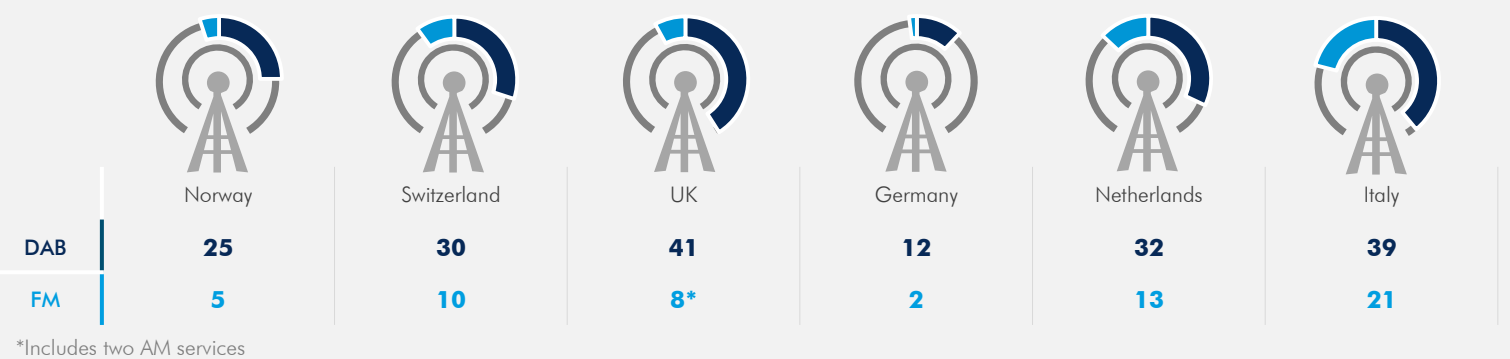
\*KM 1st level road coverage (motorways, autobahns, autostrade, autostradas, autoroutes). However most countries also have equivalent coverage on 2nd level routes. | 1 BBC National | 2 National mux only, regional muxes provide further coverage. | 3 Road coverage of DAB+ area covered in five metropolitan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

DAB/DAB+ HOUSEHOLD RECEIVER PENETRATION



4 Refers to % of people who have access to a DAB+ digital radio at home, at work or in the car in major metropolitan areas.

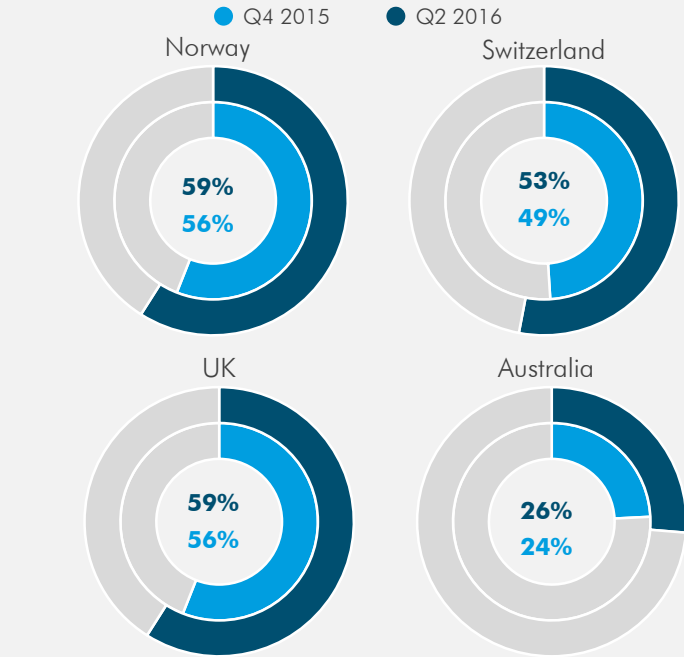
NUMBER OF NATIONAL STATIONS ON DAB/DAB+ VS FM



\*Includes two AM services

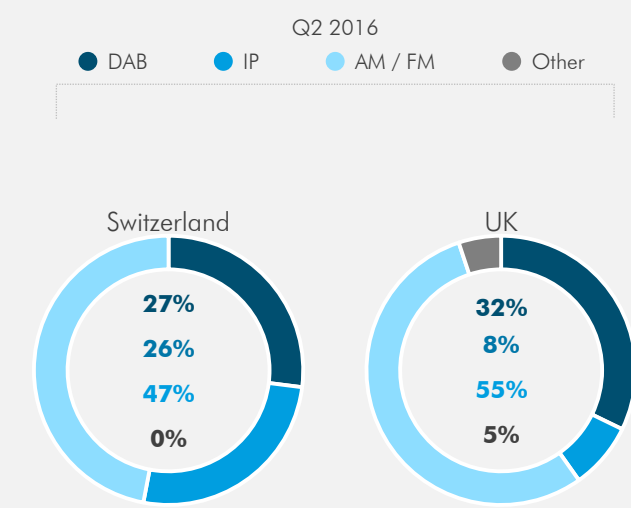
DIGITAL RADIO REACH ALL PLATFORMS

the % of people who listen to digital radio in a given time period

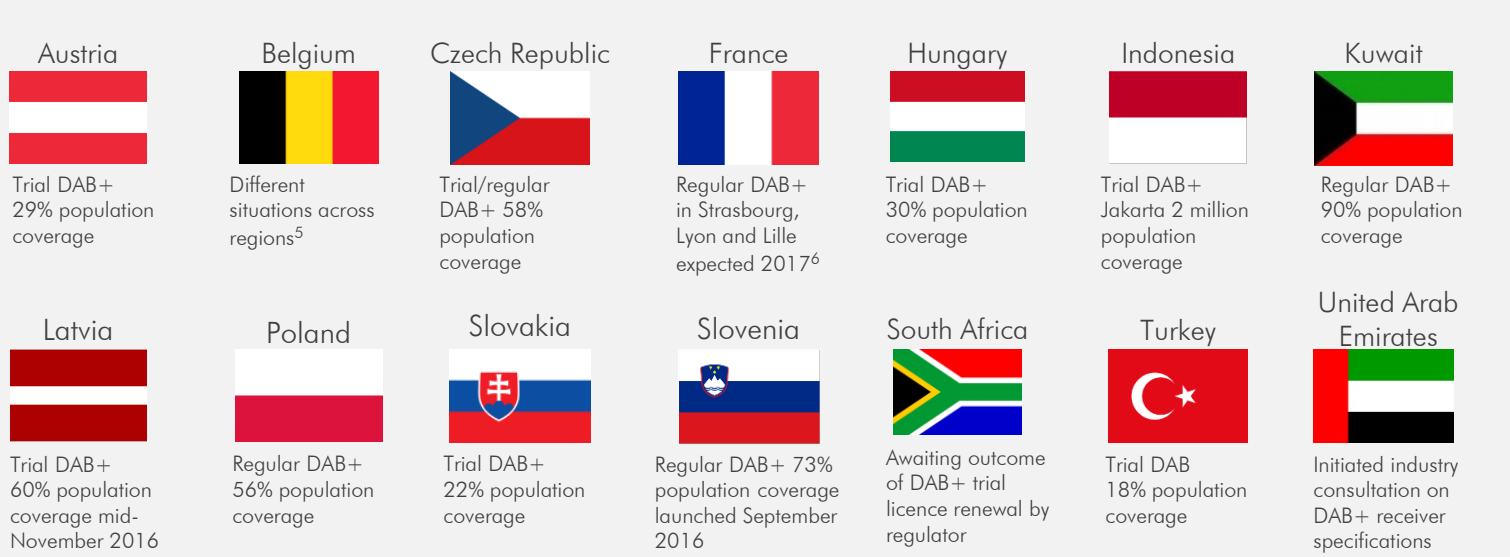


DAB/DAB+ SHARE

the % of total listening hours which are listened to via DAB/DAB+



EMERGING MARKETS



5 Currently, regular DAB covers 95% of population, regular DAB+ covers 50% of Flanders population and trial DAB+ covers 95% of Wallonia population. From 2017/18, regular DAB+ will cover ~99% of the total population.

6 Regular DAB+ services on air in Paris, Marseille, Nice since 2014 (19% population coverage)

DIGITAL RADIO MARKETING BODIES

Norway – [radio.no](#) | Switzerland – [digitalradio.ch](#) | United Kingdom – [getdigitalradio.com](#) | Denmark – [digitalradio.dk](#) | Germany – [digitalradio.de](#) | Netherlands – [digitalradio.nl](#) | Italy – [digitalradio.it](#) | France – Alliance for Digital Radio | Australia – [digitalradioplus.com.au](#) | Austria – [digitalradio-oesterreich.com](#) | Belgium – [digitalradio.be](#) | Czech Republic – [rozhlasy.cz/digital](#) | Poland – [polskieradio.pl](#) | Slovenia – [rtvslo.si/dab](#) | South Africa [sadiiba.org](#) | United Arab Emirates [tra.gov.ae](#)

Sources: Digitalradio Norge, TNS Gallup, MCDT, GfK, SMMT/CAP UK, BBC, RAJAR/Ipsos MORI/RSMB, Teracom A/S, Deutschlandradio, WDR, Media Broadcast, Digitisation report 2016 carried out by TNS Infratest, JATO Dynamics, Digital Radio NL, digitalradio.it, Glass's Automotive Business Intelligence, Commercial Radio Australia, Verein Digitalradio Österreich, Norkring Belgium, RTBF, Czech Radio, WorldDAB with industry inputs, National Media and Infocommunications Authority Hungary, RRI, Ministry of Information Kuwait, LVRTC, RTV Slovenija, Towercom, a.s., ICASA, Polskie Radio, TRT, Telecom Regulatory Authority & Emirates Standardization and Metrology Authority

For a full list of sources attributable to each statistic visit the WorldDAB website.

## DAB/DAB+ RECEIVER SALES (INCLUDING LINE FIT AUTOMOTIVE)

Sources: Digitalradio Norge and TNS Gallup (Norway), MCDT (Switzerland), Digitisation report 2016 carried out by TNS Infratest (Germany), GfK\*, 2011 GfK data for Denmark does not include Clock Radio and Portable Radio (Denmark), GfK\* (Netherlands), JATO Dynamics 2016, DAB+ as standard year 2013 to Q1-2 2016 (Netherlands automotive), GfK\* (Italy), digitalradio.it (Italy automotive), GfK\* (France), GfK\* (excludes sales of aftermarket DAB+ devices in vehicles), March 2016 and Glass's Automotive Business Intelligence Q1.2016 and total sales figures supplied by vehicle manufacturers in Australia supporting DAB+ digital radio, January 2014 (Australia), GfK\* (UK), SMMT/CAP UK (UK automotive)

## TOTAL DAB/DAB+ NETWORK COVERAGE (% OF POPULATION) 2013 VS 2016

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

## DAB/DAB+ 1st LEVEL ROAD COVERAGE \*

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

## DAB/DAB+ HOUSEHOLD PENETRATION

Sources: Digitalradio Norge and TNS Gallup (Norway), Q2 2016. RAJAR/Ipsos MORI/RSMB (United Kingdom), MCDT (Switzerland), Digitisation report 2016 carried out by TNS Infratest (Germany), TNS Gallup (Denmark), digitalradio.it (Italy), WorldDAB (France), GfK Radio Ratings, Surveys 1-3, 2016 (Australia)

## NUMBER OF NATIONAL STATIONS ON DAB/DAB+ VS FM

Sources: WorldDAB

## DIGITAL RADIO REACH ALL PLATFORMS

Sources: GfK Digital Radio Reports 1-2, 2016 SMBAP, Cumulative audience, Monday to Sunday, midnight to midnight, all people 10+, digital radio listening only (Australia), Percentage of listeners that use digital radio, MCDT (Switzerland), Daily reach, Digitalradio Norge and TNS Gallup (Norway), Q2 2016. RAJAR/Ipsos MORI/RSMB (United Kingdom)

## DAB/DAB+ SHARE

Sources: MCDT (Switzerland), Q2 2016. RAJAR/Ipsos MORI/RSMB (United Kingdom), Digitisation report 2016 carried out by TNS Infratest (Germany)

## EMERGING MARKETS

Sources: Verein Digitalradio Österreich (Austria), Norkring Belgium and RTBF (Belgium), Czech Radio (Czech Republic), WorldDAB with industry inputs (France), National Media and Infocommunications Authority Hungary (Hungary), RRI (Indonesia), Ministry of Information Kuwait (Kuwait), LVRTC (Latvia), RTV Slovenija (Slovenia), Towercom, a.s. (Slovakia), ICASA (South Africa), Polskie Radio (Poland), TRT (Turkey), Telecom Regulatory Authority & Emirates Standardization and Metrology Authority (United Arab Emirates)

\*GfK Point of Sale DAB+ Fusion Reporting, including coverage extrapolation