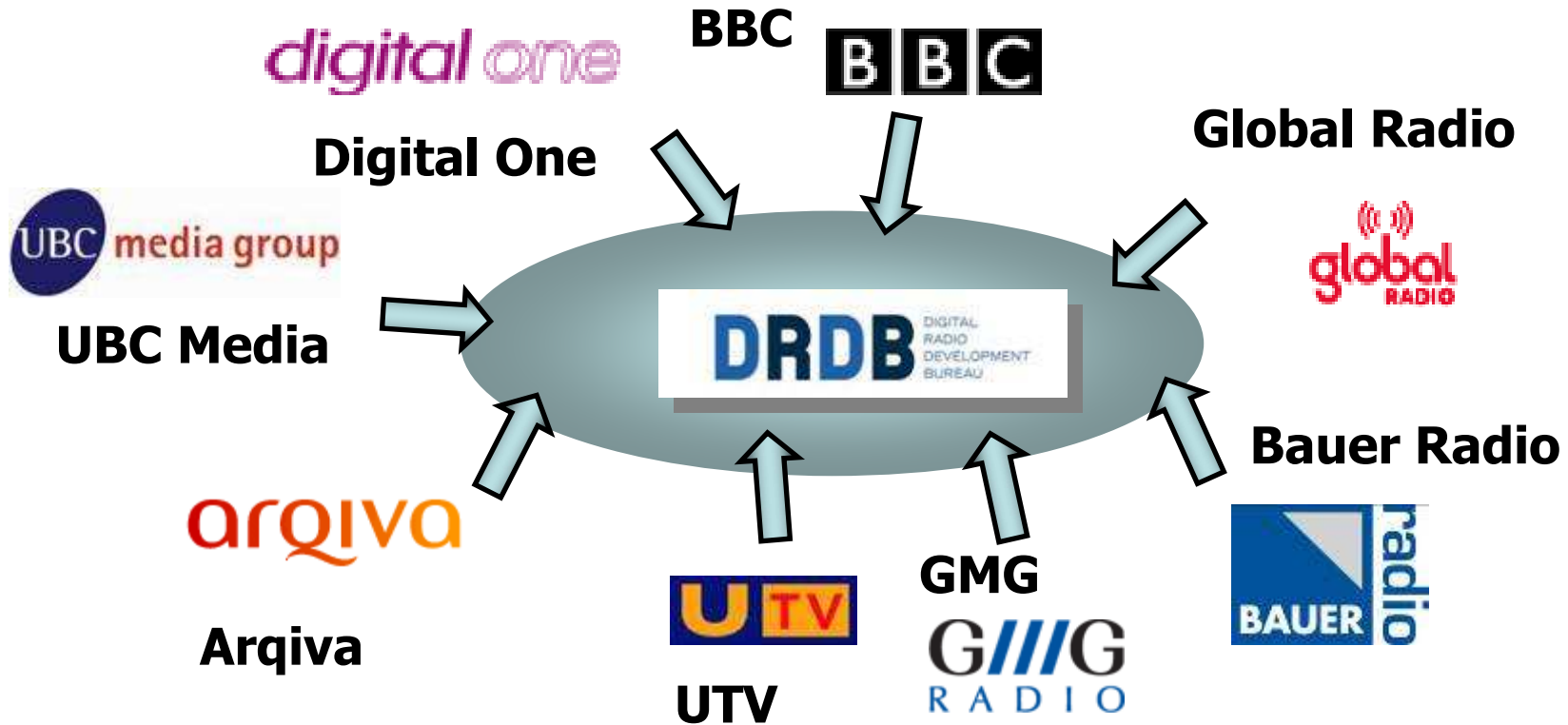


DRDB presentation

**To WorldDMB Car
Manufacturers Workshop
May 27, 2009**

DRDB – Who we are



Understand the Market

Promote to Consumers

Support Retailers & Manufacturers

DRDB – What we do

- Industry website with postcode checker



- On air radio advertising
- In store Point of Sale



In print

- Print promotions



- Editorial coverage



Working with industry

- Delivering market data to the industry



- Regular briefings to retailers, manufacturers, press and broadcasters



Working with government and trade bodies

- Ofcom, DCMS, Individual MPs, Committee briefings



- Intellect, Retra, RadioCentre

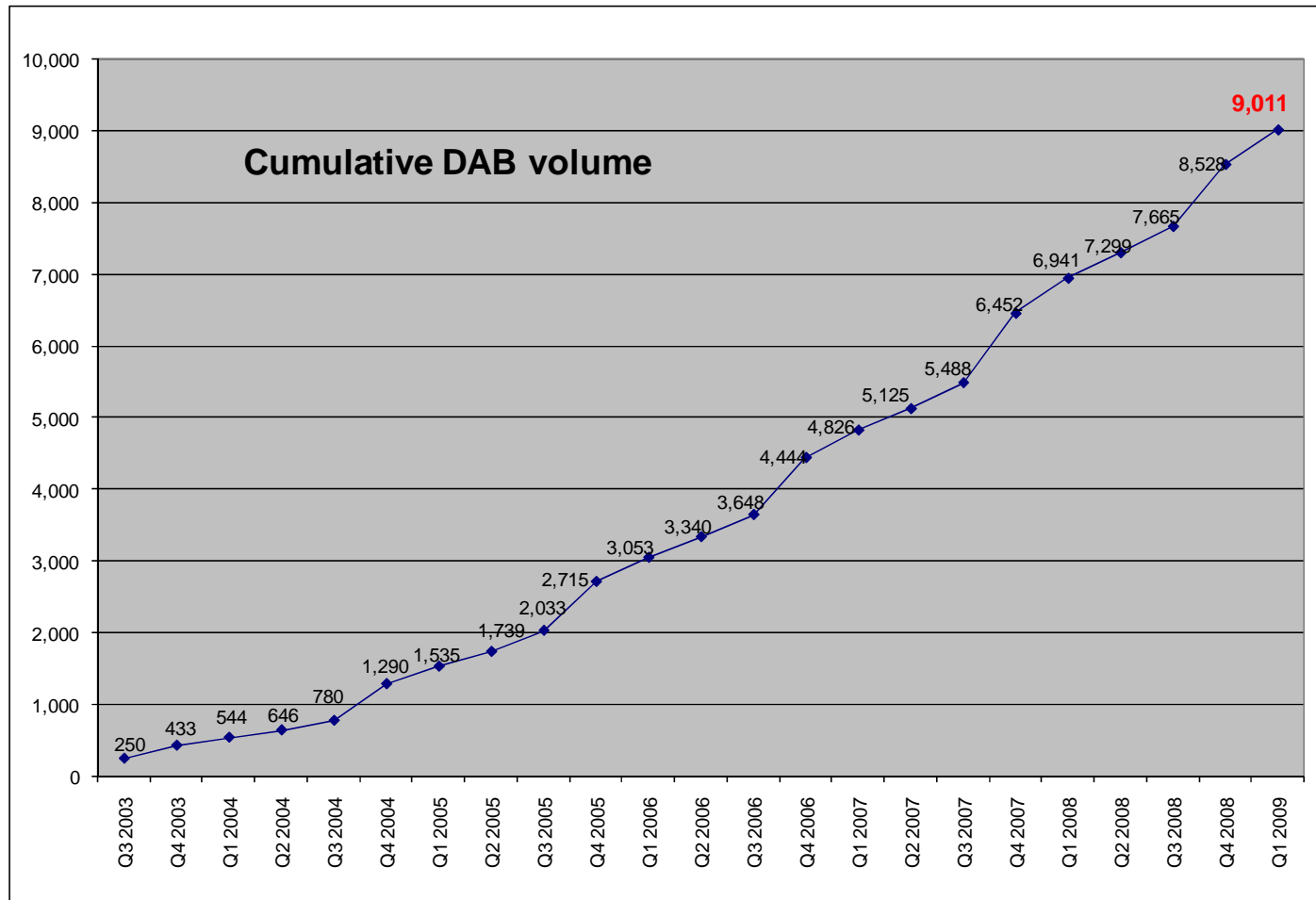


The DAB market in the UK

- Set sales
- Ownership
- Stations
- Listening
- The car market
- The UK's digital future

DAB cumulative sales now 9 million

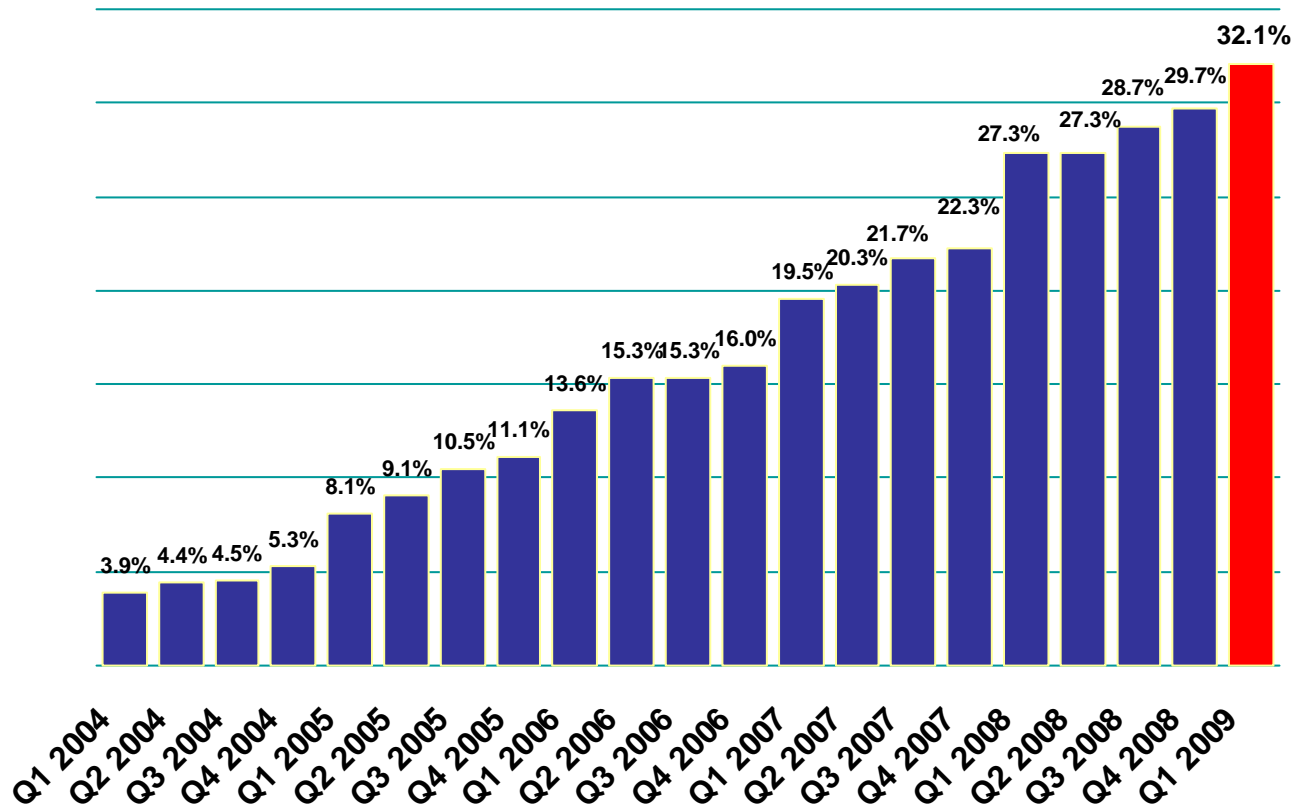
(volume
in 000s)



Source: GFK

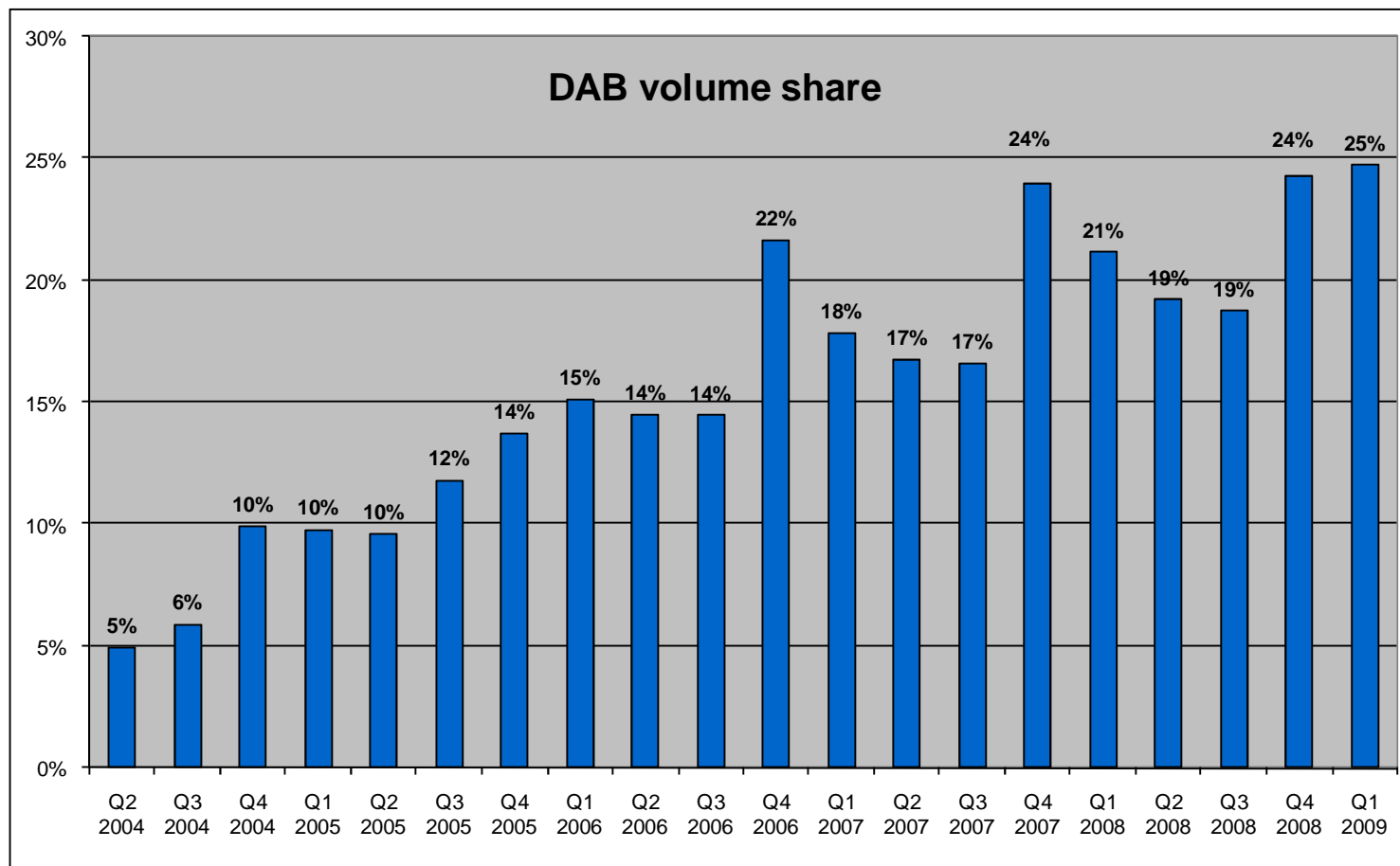
32.1% of adults now have DAB at home

Ownership up 17% year-on-year



Source: RAJAR Main Survey Q1 2009

DAB volume share reaches 25% of all sales for the first time



Stations available via DAB

~~350~~
analogue services

426

= 230
services
only available
through a DAB
radio

DAB services

368 commercial, 58 BBC

brands

152

= 32
brands
only available
through a DAB
radio

DAB brands

42 BBC, 110 commercial

Analogue figure – Ofcom (licences awarded). DAB: May 09

Consumer Benefits Leeds Analogue Radio

National

BBC
RADIO



BBC
RADIO



BBC
RADIO



BBC
RADIO



90 – 93FM

92 – 95 FM &
198 LW

BBC
RADIO



CLASSIC *fm*

Absolute.

absoluteradio.co.uk

talkSPORT

DRDB DIGITAL
RADIO
DEVELOPMENT
BUREAU

Regional



BBC
RADIO



*magic*⁸²⁸

BBC RADIO LEEDS

92.4, 95.3 FM & 774 AM

96.3radioaire

DRDB DIGITAL
RADIO
DEVELOPMENT
BUREAU

Leeds DAB Digital Radio

National



Regional



Local



Birmingham Analogue Radio

National

BBC
RADIO



BBC
RADIO



BBC
RADIO



BBC
RADIO



90 – 93FM

92 – 95 FM &
198 LW

BBC
RADIO



CLASSIC fm

Absolute.

▶ absoluteradio.co.uk



Regional

heart



BBC
RADIO



LOVE LIFE. LOVE MUSIC.

Local



galaxy
love music

brmb
96.4FM - DAB - ONLINE



BBC WM

Birmingham DAB Digital Radio

National



Regional



Local



Bristol Analogue Radio

National

BBC
RADIO



BBC
RADIO



BBC
RADIO



BBC
RADIO



90 – 93FM

92 – 95 FM &
198 LW

BBC
RADIO



CLASSIC *fm*

Absolute.

absoluteradio.co.uk



Regional



Local



heart

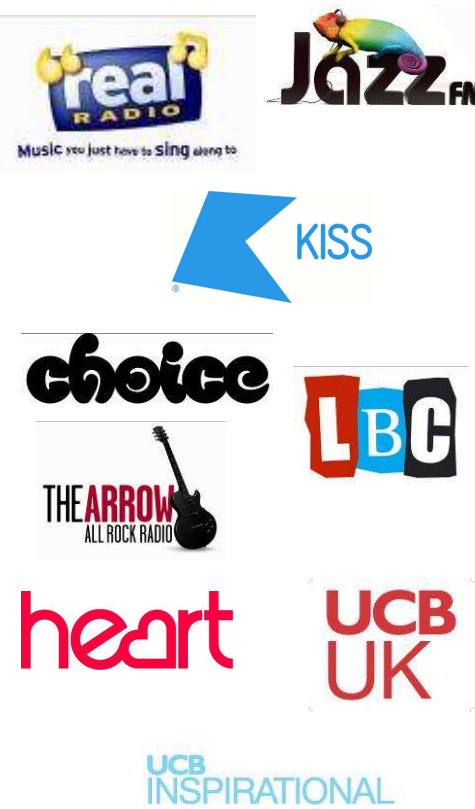
BBC BRISTOL

Bristol DAB Digital Radio

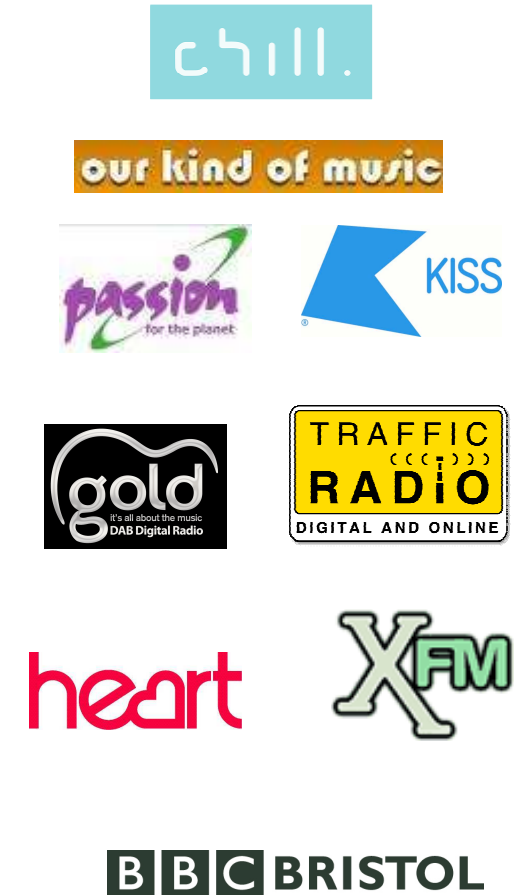
National



Regional

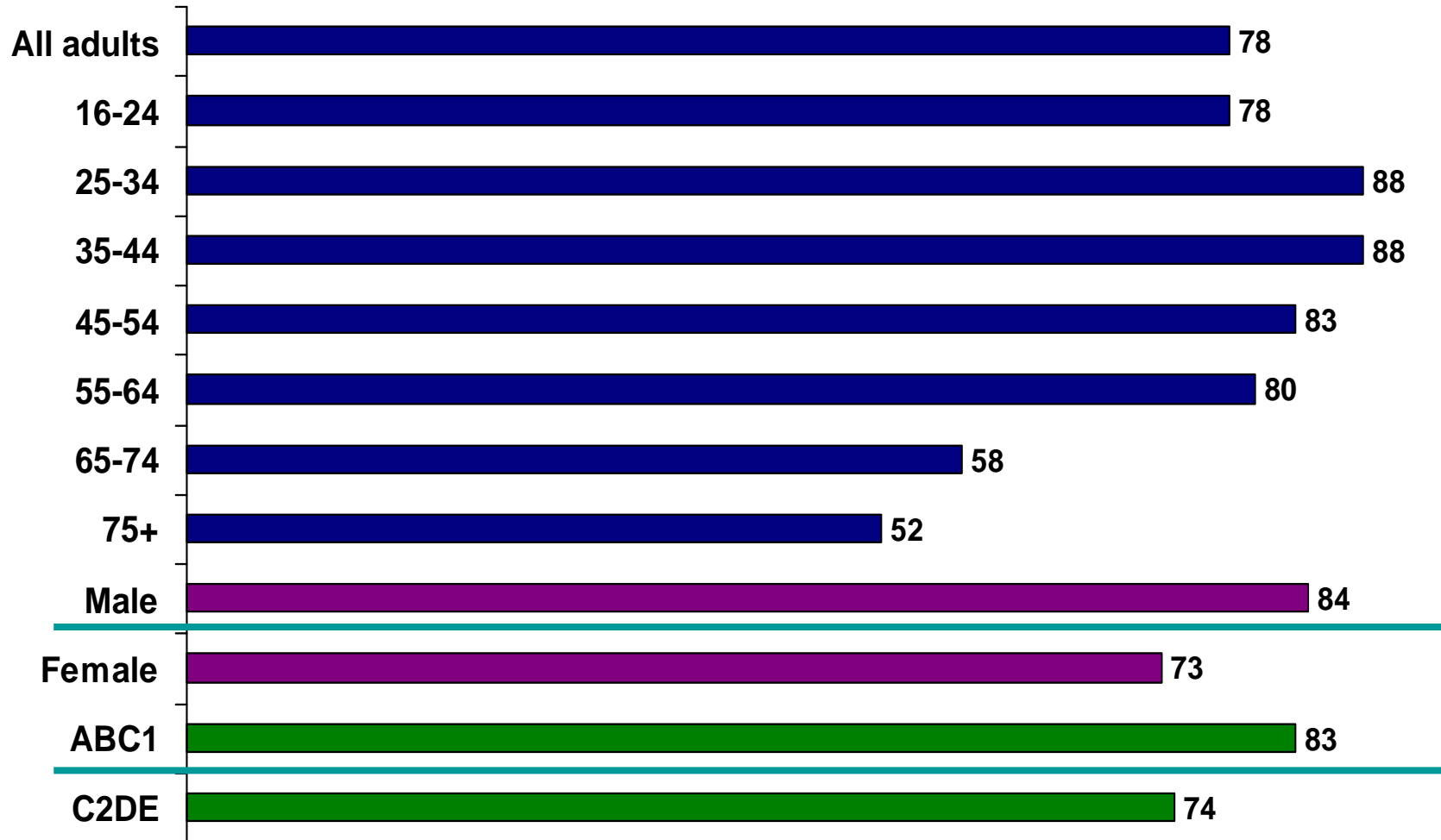


Local



Awareness of DAB

%

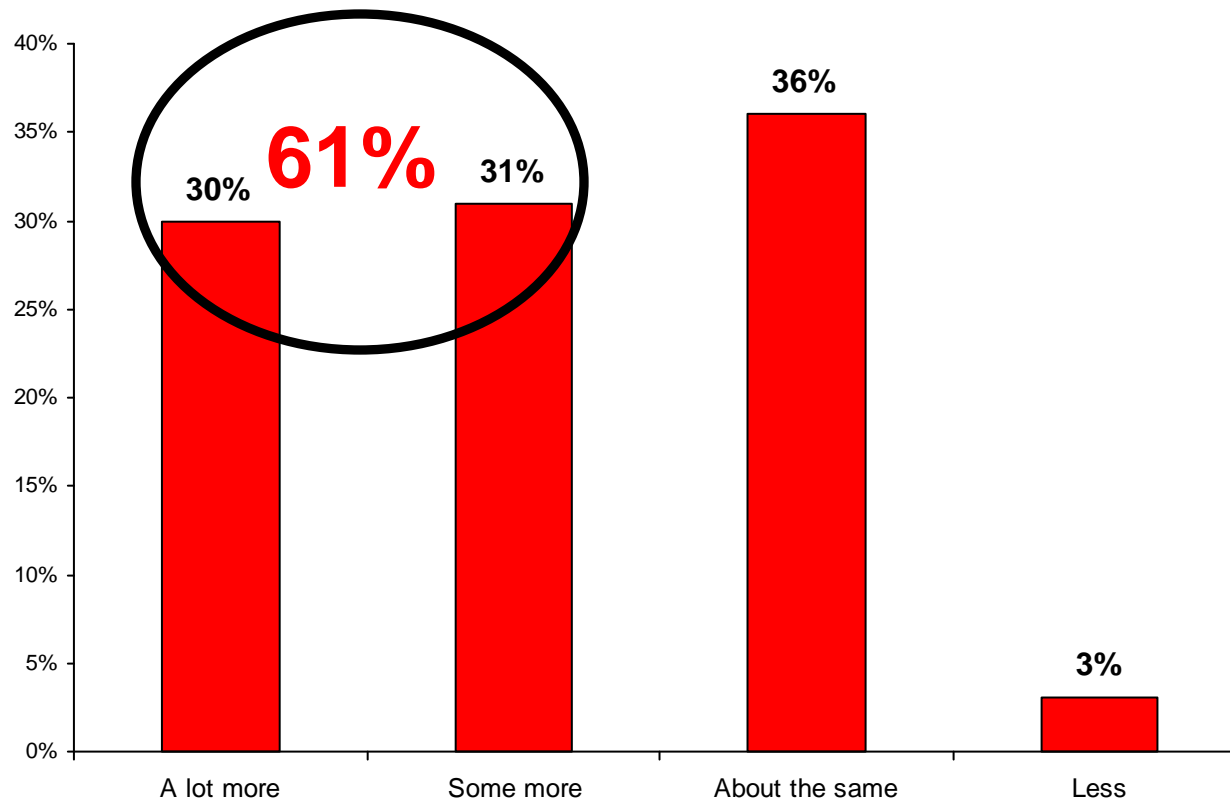


Oliver Rowe research 2009

DAB owners:

Listen to more radio since getting DAB?

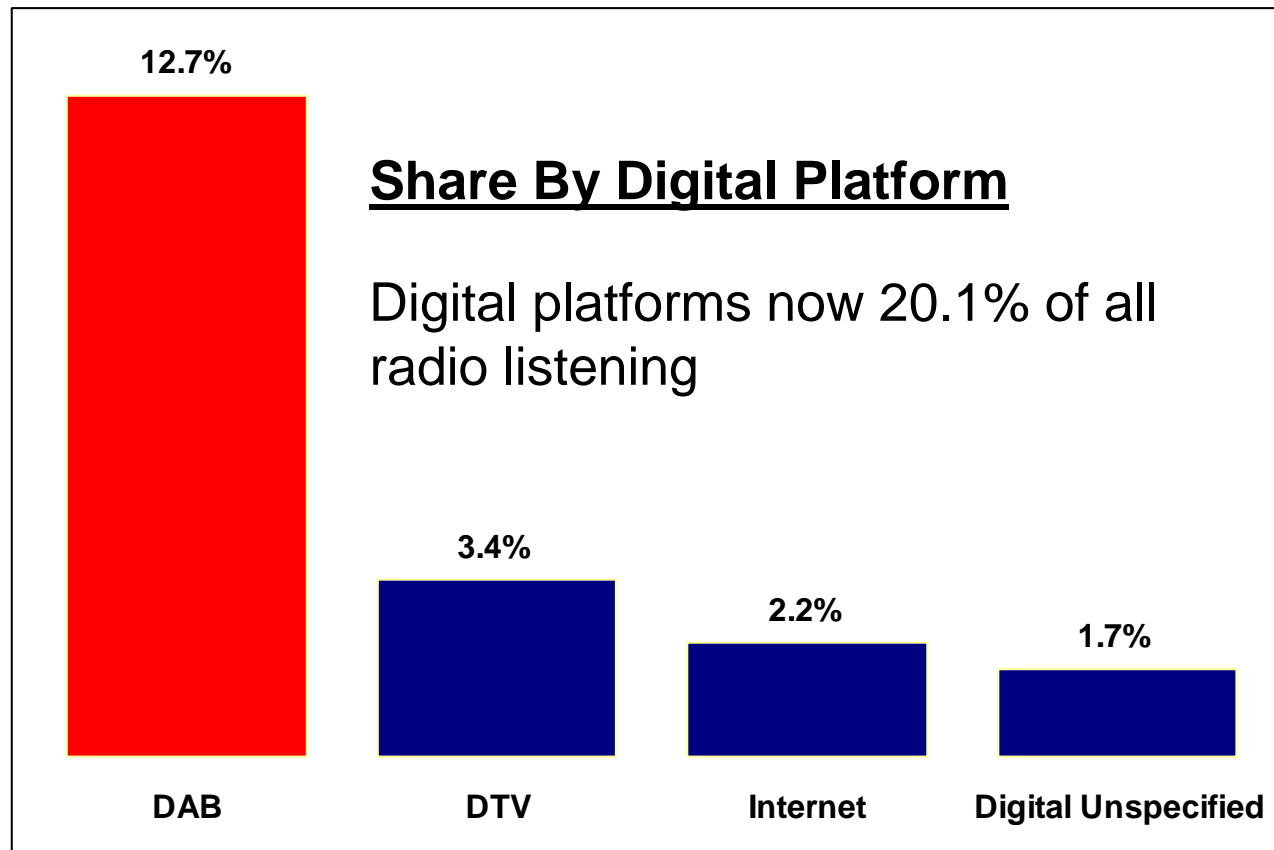
61% are listening to more radio, 30% a lot more



Q. Since you started listening to your DAB digital radio, have you listened to the radio.....

Digital listening now over 20%

DAB accounts for 12.7% all listening



Source: RAJAR Main Survey Q1 2009

The In-Car Market

More car manufacturers offering DAB

- DAB comes as standard on a range of cars from Audi, BMW, Ford, Jaguar, Land Rover, Lexus, Lotus, Mercedes, Mini, Renault, Toyota, Vauxhall, Volvo, VW
- All these manufacturers also offer DAB as optional upgrade on most models

The In-Car Market

In-car adaptors growing the market

- Historically, sales of after-fit DAB radios were very small due to high cost, need to fit external aerial and barriers to removing inherited radio
- New adaptors for car, using short range device has increased the market by 300%
- Shows that if easy-fit, affordable product is available, people will buy DAB for car

The In-Car Market

In fact, consumers say they “expect” a new car to come with DAB

- 63% expect a new car to have DAB as standard
- 31% expect to have to pay for DAB in a new car

The In-Car Market

Car manufacturers want:

- Commitment to the DAB platform
- Geographical coverage to match FM
- A pan-European chip solution

The In-Car Market

- Multi-standard chips open the way for pan-European models
- Radios that can automatically receive DAB, DAB+, DMB, FM, AM mean economies of scale across Europe are now possible

The UK's digital radio future

- Government launches “Digital Britain”, summer 2009
- “A bold digital migration plan that involves all the parties to take the majority of listening from FM to DAB as soon as possible.”
- Undertakes to “engage with manufacturers and other European countries to implement the European digital radio profiles agreed by World DMB”

Migration could be triggered by 2015

- Criteria for migration includes:
 - 50% of total listening across digital platforms
 - National multiplex geographic coverage to match FM

The radio industry responds

- BBC and commercial radio have recently announced the formation of the Radio Council
- a new cross-industry council to help secure the future of radio, including driving digital switchover

In Summary

- DAB sales remain strong
- Listening reach and share growing
- Broadcasters committed to DAB
- Car manufacturers' needs being met
- With government support, the drive to digital switch-over has begun



Thank you

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