

# GfK Point-of-Sale Tracking

DAB Receiver Sales

World DAB General Assembly 2016, Vienna

GfK Retail and Technology  
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# 1. GfK Point of Sales (POS) Tracking Methodology

# GfK Point of Sales (POS) Tracking

We help you track performance and optimize product strategy



## INSIGHTS DELIVERY

Regular reporting – weekly, monthly, quarterly...

## QUALITY CHECK

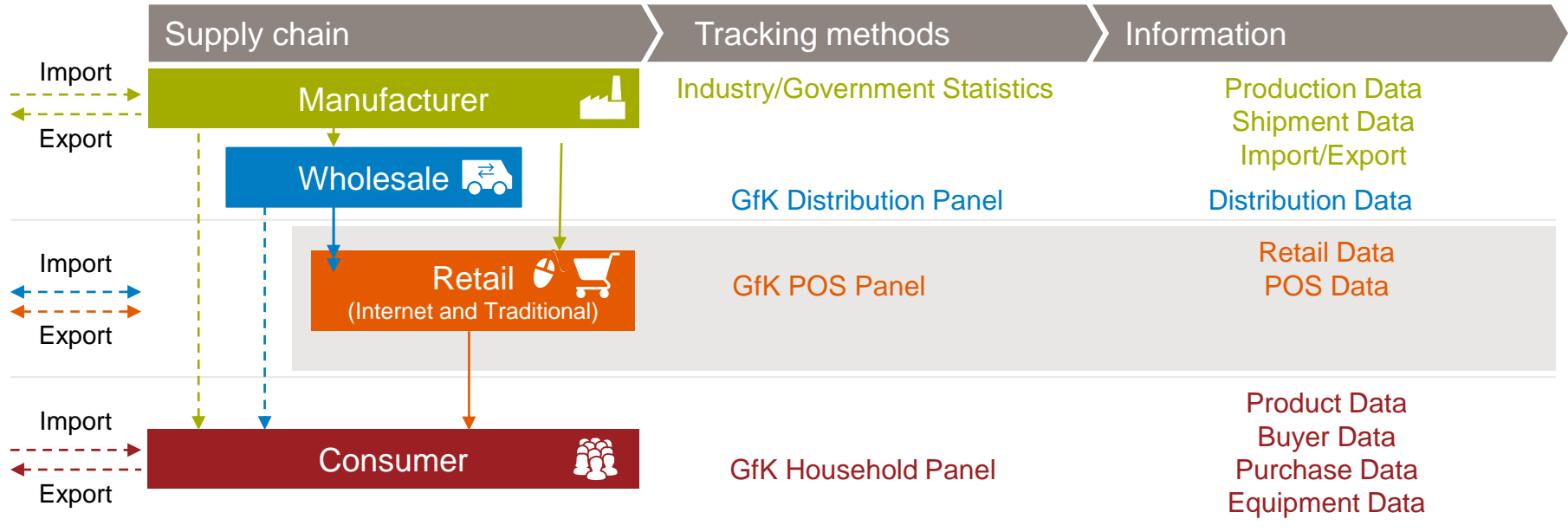
14.5 million products in our database

## DATA COLLECTION

What sold where at which price and when?

# GfK POS Tracking Methodology

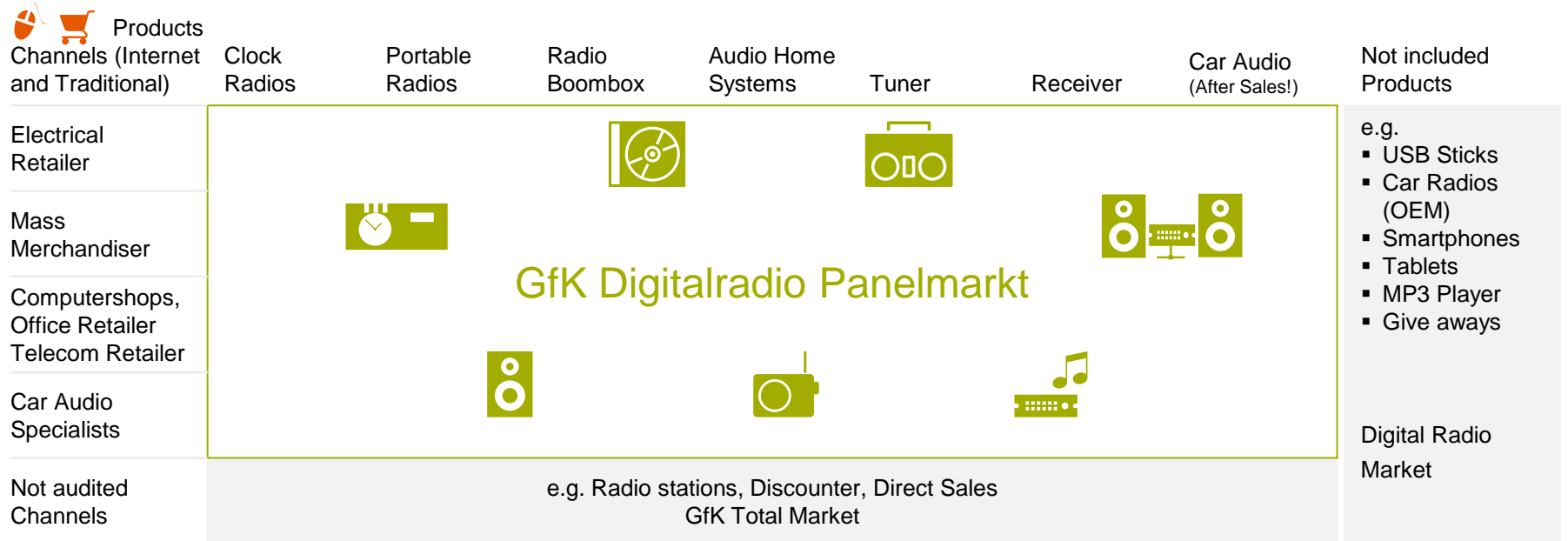
## The Characteristics of the GfK Retail Panel



- Track market, feature share, brand performance and competition and analyze global and local market trends
- Optimize product assortment, distribution and pricing strategy

# GfK POS Tracking Methodology

## Digital Radio Market



**GfK Panel Market vs. GfK Total Market**  
**Coverage Estimation: in most countries more than 80%**

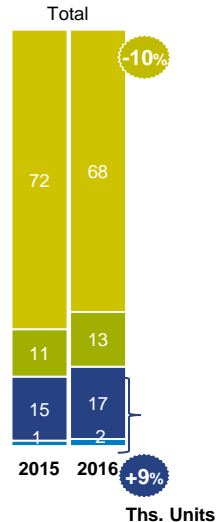


## 2. Sales of Digital Radio Receivers

# Digital Radio is growing and is gaining share in domestic radio. Hybrid Radios nearly not available in the market.



AHS, Tuner, Receiver, Radio devices (Table Top) Panelmarket Europe 12+AU. Feature Share | Sales Units % | Jan – Sep



|       |       |  |  |
|-------|-------|--|--|
| 9,340 | 8,364 |  |  |
| 1,479 | 1,614 |  |  |
| 1,997 | 2,143 |  |  |
| 170   | 223   |  |  |

■ Analogue Radio 
 ■ Internet Radio 
 ■ Digital Radio 
 ■ Hybrid Radio

GfK POS Panel

The background of the slide features a man, likely Tom Cruise, in a futuristic, high-tech environment. He is wearing a black t-shirt and black gloves with glowing blue lights on the fingers. He has his hands raised, and there are various digital and light effects around him, including a large, glowing blue face in the upper left and a circular light pattern around his right hand. The overall scene is dark with blue and white highlights.

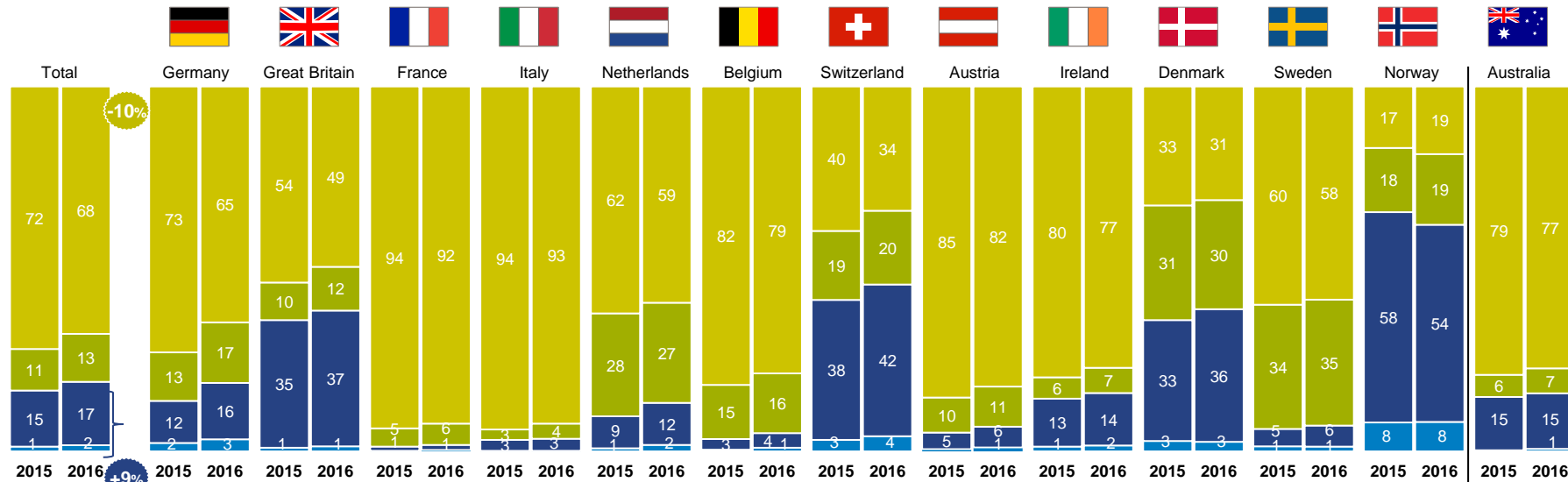
**What is the situation by country?**



# Same Sales Out Trend across all countries (except Norway): Digital Radio on the rise, Hybrid Radios nearly not existent.



AHS, Tuner, Receiver, Radio devices (Table Top) Panelmarket Europe 12+AU. Feature Share | Sales Units % | Jan – Sep



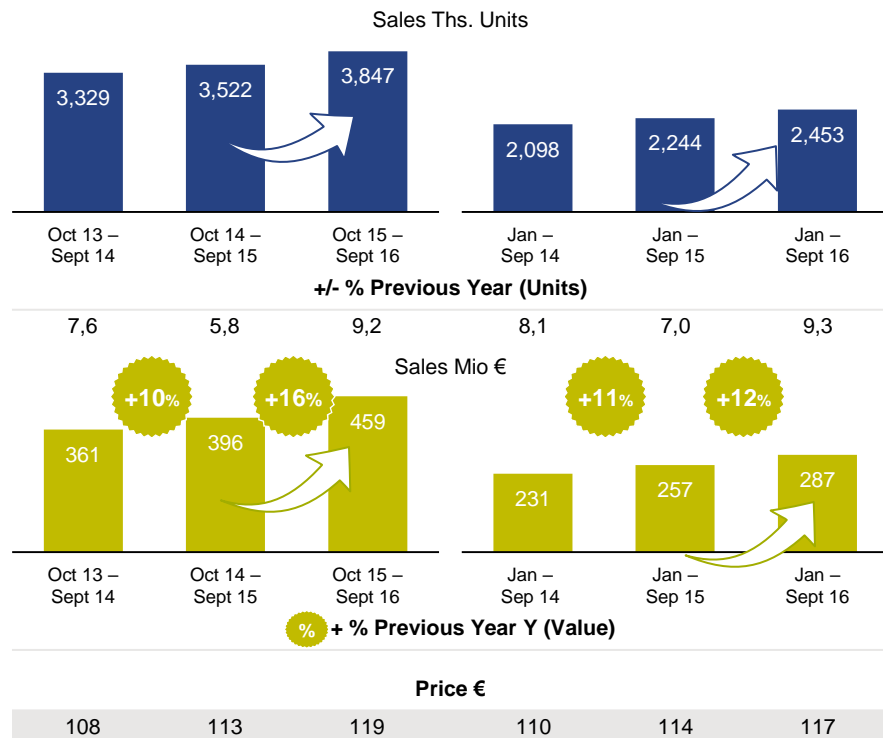
| Country        | 2015 | 2016 | 2015 | 2016 | 2015 | 2016 | 2015 | 2016 | 2015 | 2016 | 2015 | 2016 | 2015 | 2016 | 2015 | 2016 | 2015 | 2016 | 2015 | 2016 | 2015 | 2016 | 2015 | 2016 | 2015 | 2016 |    |    |
|----------------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|----|----|
| Analogue Radio | 72   | 68   | 73   | 65   | 54   | 49   | 94   | 92   | 94   | 93   | 62   | 59   | 82   | 79   | 40   | 34   | 85   | 82   | 80   | 77   | 33   | 31   | 60   | 58   | 17   | 19   | 79 | 77 |
| Internet Radio | 11   | 13   | 13   | 17   | 10   | 12   | 5    | 6    | 3    | 4    | 28   | 27   | 15   | 16   | 19   | 20   | 10   | 11   | 6    | 7    | 31   | 30   | 34   | 35   | 18   | 19   | 6  | 7  |
| Digital Radio  | 15   | 17   | 12   | 16   | 35   | 37   | 1    | 1    | 3    | 3    | 9    | 12   | 3    | 4    | 38   | 42   | 5    | 6    | 13   | 14   | 33   | 36   | 5    | 6    | 58   | 54   | 15 | 15 |
| Hybrid Radio   | 1    | 2    | 2    | 3    | 1    | 1    | 1    | 1    | 3    | 3    | 1    | 2    | 3    | 4    | 3    | 4    | 5    | 1    | 1    | 2    | 3    | 3    | 3    | 8    | 8    | 3    | 6  |    |

■ Analogue Radio ■ Internet Radio ■ Digital Radio ■ Hybrid Radio  
GfK POS Panel

# The Digital Radio market is growing further up to nearly 4 Mio. units. Brand and model variety for the consumers has increased strongly.



Digital Radio incl. Car Audio After Sales, Panelmarket Europe 12 + AU

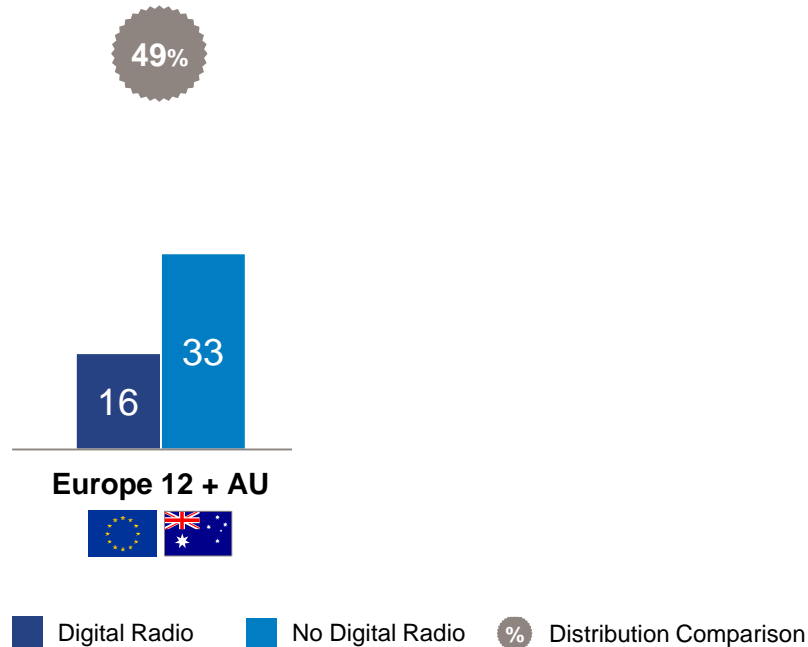


# Distribution Gap: Every 2<sup>nd</sup> shop selling radio, does also sell Digital Radio.



Unweighted Selling Distribution in % Jan – Sep 16

In countries like AT and DE, DAB is still available in less shops than No DAB

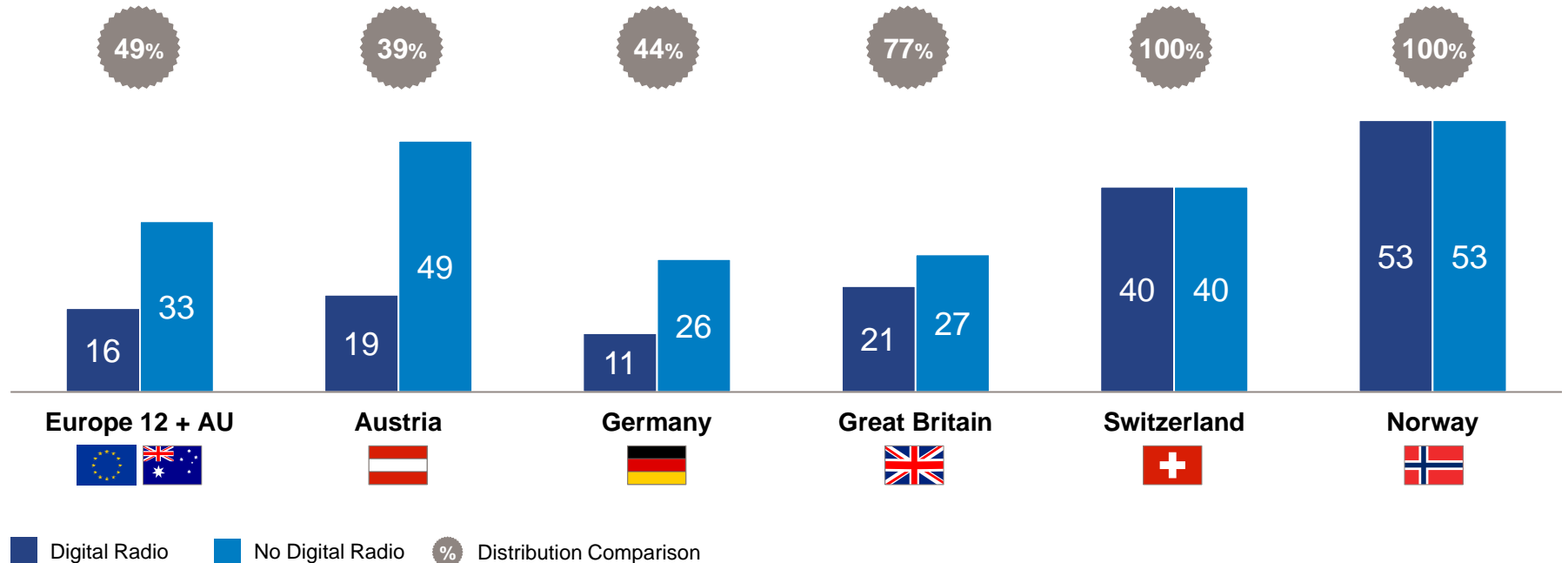


# Distribution: The more Digital Radio established, the closer its distribution compared to no Digital Radio. For other countries the gap needs to be closed.



Unweighted Selling Distribution in % Jan – Sep 16

In countries like AT and DE, DAB is still available in less shops than No DAB



# 3. Summary

## Summary of Sales of Digital Radio Market based on the POS Panel



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The sales of Digital Radios are continuously **growing strongly**.  
**Increasing Number** of SKUs/models and brands at the POS.

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DAB is already a **mass product in GB, CH and NO**.  
**DE** with strong growth rates **on the way**.

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Digital Radios **distribution gap** is closed for established countries,  
for new ones it needs to be closed.

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**Sales potential for retailers and manufacturers.**

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# Stay in touch



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