



DAB digital radio – France Update

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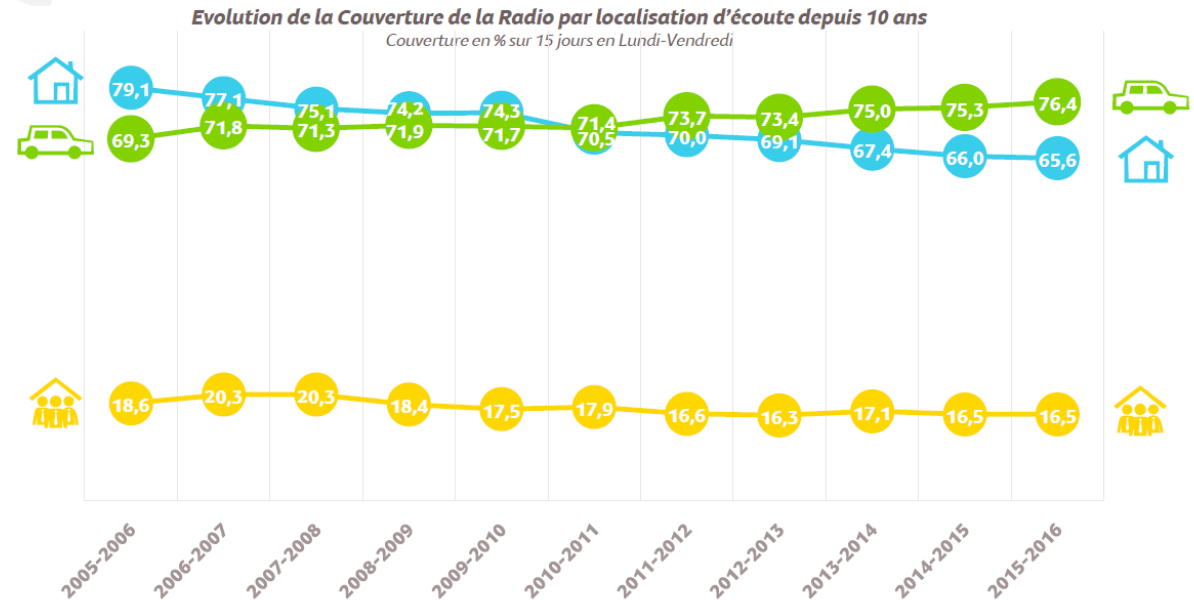
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Radio, a key medium for Automotive in France (Source : Médiamétrie)



- Car is the only place where radio listening is growing

- Listening Time in percent
 - 31% overall in car
 - 39% for the working class
- Note : music station are the most listened to in car, just before local stations



Car Manufacturers Situation

- Both PSA and Renault are ready for all their new vehicle for any country (line fit or option) : DAB option is managed per vehicle not as an Audio feature in the country
 - PSA has dealer recommended solutions. For line fit, they focus on Audio quality and driver experience, starting with the 3008 (Focal HiFi). Warning : watch for station display (. / .. / ...) that should not be there and automatic station list update
 - Renault : a gap is clearly identified between the tech team and country marketing
- An informal survey of dealers selling in France show that they do not know about DAB / DAB+ / RNT
 - Confusion between IP (digital), DAB, DR, RNT and ... digital display
- Viewed from the end users, there is a lack of consistency in the way to display DAB (Salon de l'Auto 2016)



The retail situation

- ~750k car radios are sold per year in France (compared to 2M new cars, 5M used cars, 32Mu cars total, 6Mu UV)
 - Volume retail price is below 100€.
 - DAB receivers are above the 100€ barrier (Android Auto above 300€)
 - Only 5.5% sold online (20% for household receivers)
- The retailer decisions are extremely centralized – they plan their shelves line up against national needs
- The yearly retailers gathering “Medpi” was an opportunity to insist on the timetable for “RNT” in France
 - Both “Norauto” and “Feu Vert” (key auto retailers) were exposed to the Lille, Lyon and Strasbourg deployment as well as what is happening on the other side of the borders
 - A business opportunity for these 2 retailers respectively based in Lille and Lyon with stores across France



Opportunities

- The public consultation discussed by the CSA on highway coverage is a game changer for the auto industry and DAB
- For Car Manufacturers, please send me your local marketing contacts
 - We will have actions during the Lille, Lyon and Strasbourg launch

Thank you

For further information, contact:

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