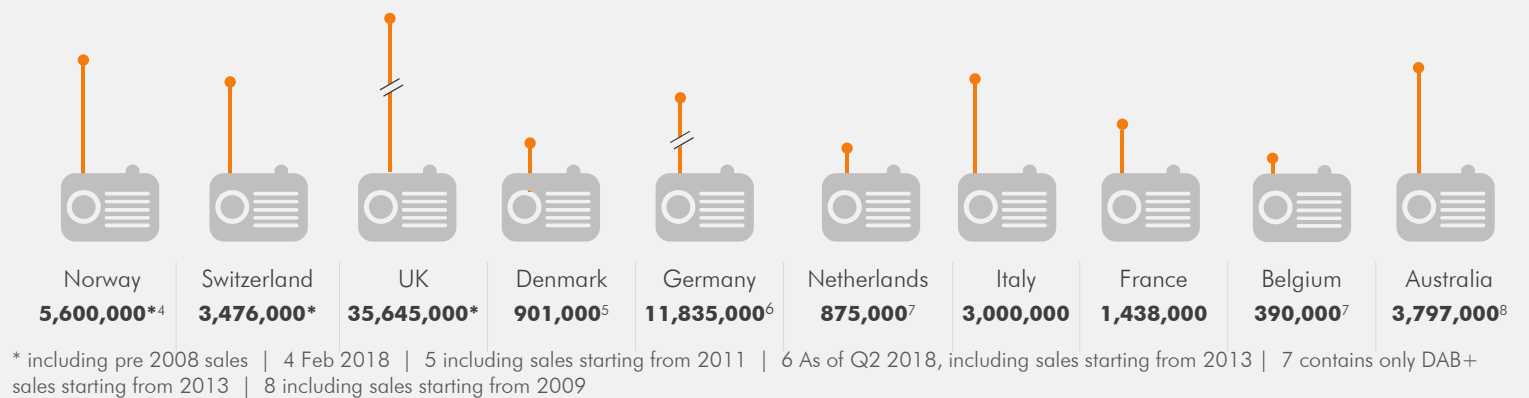


## Government policy status

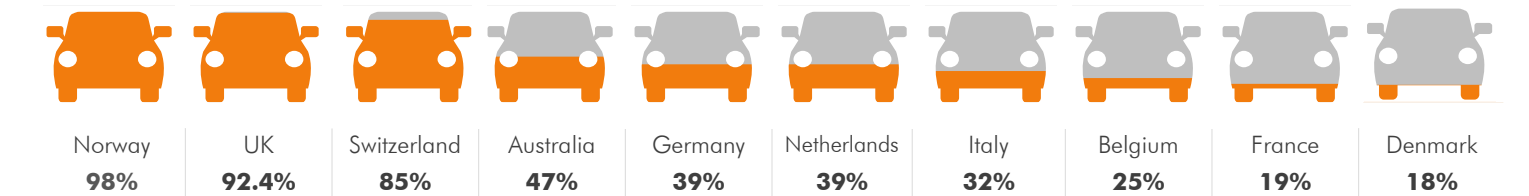
**Norway** – the digital switchover completed for all national radio Dec 2017 | **Switzerland** – DSO planned for 2020-2024<sup>1</sup> | **United Kingdom** – Future UK policy on digital radio to be addressed in Government review as digital listening accounts for 50% of platform share | **Denmark** – timing of DSO to be decided when 50% of listening is digital | **Germany** – Digital Radio roadmap published by authorities Feb 2017, 2nd national mux to launch by Q1 2019 | **Netherlands** – fastest DAB+ launch, backed by Government support | **Italy** – national coverage to reach 82% by end-2018<sup>2</sup> | **France** – four cities on air; six to start broadcasting in 2018/2019<sup>3</sup>; 15 regional tenders in 2018 and again in 2019; national tender in 2018 | **Belgium** – Flemish and French speaking governments committed to a digital radio future | **Australia** – DAB+ in 5 metropolitan areas, permanent services starting in Canberra, Darwin and Hobart in 2018, planning underway for other regions

<sup>1</sup> Commitment of the industry; communication of DSO-Date planned for Q1 2019 | <sup>2</sup> End of 2017 the coverage was 78% at 45 dBuV signal | <sup>3</sup> including Lille

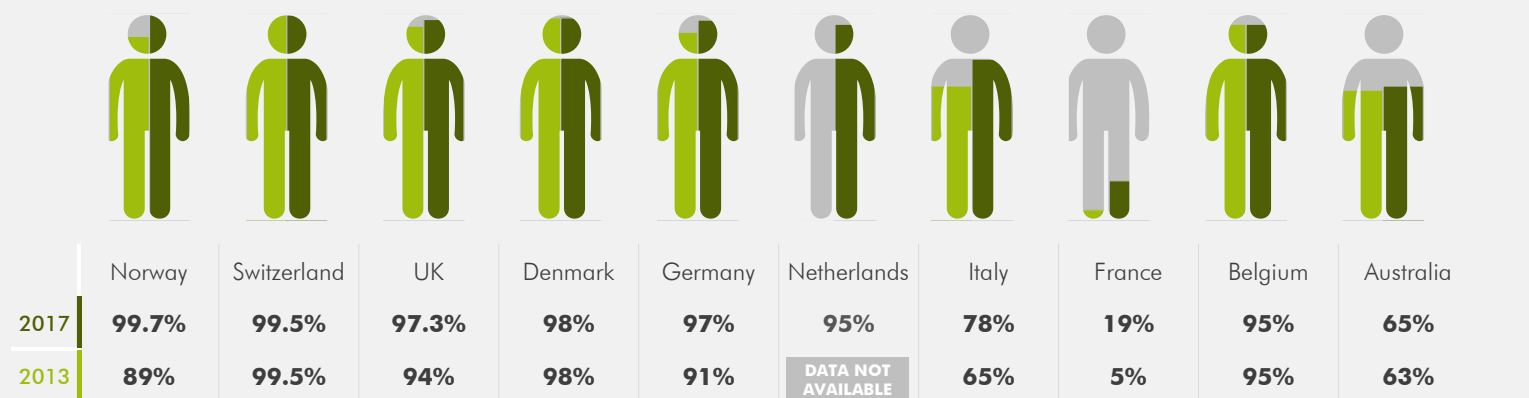
## CUMULATIVE DAB/DAB+ RECEIVER SALES (INCLUDING LINE FIT AUTOMOTIVE) 2008 – 2017



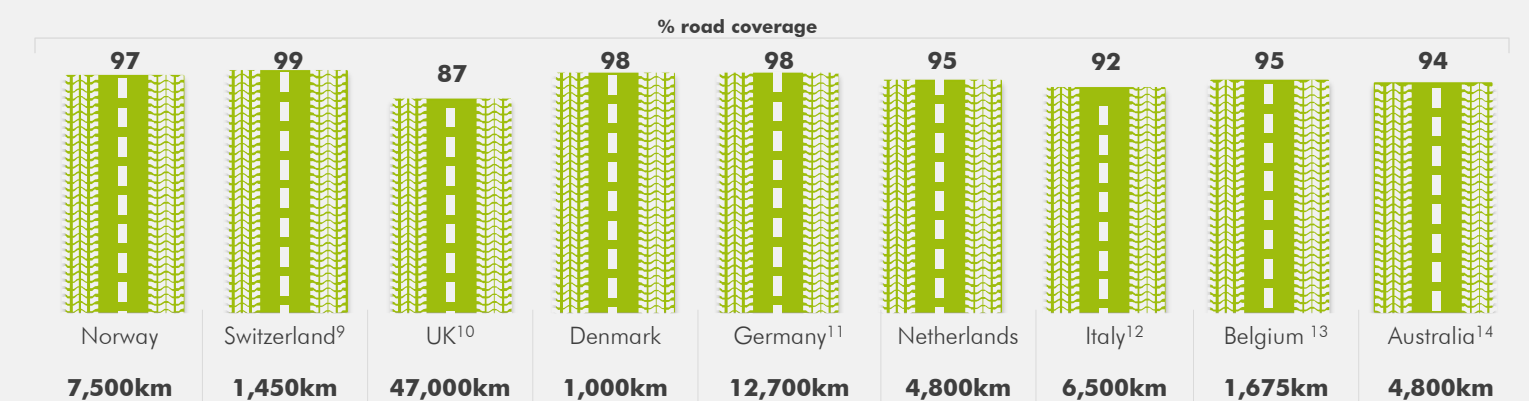
## % NEW CARS W/DAB/DAB+



## TOTAL DAB/DAB+ NETWORK COVERAGE (% OF POPULATION) 2013 VS 2017

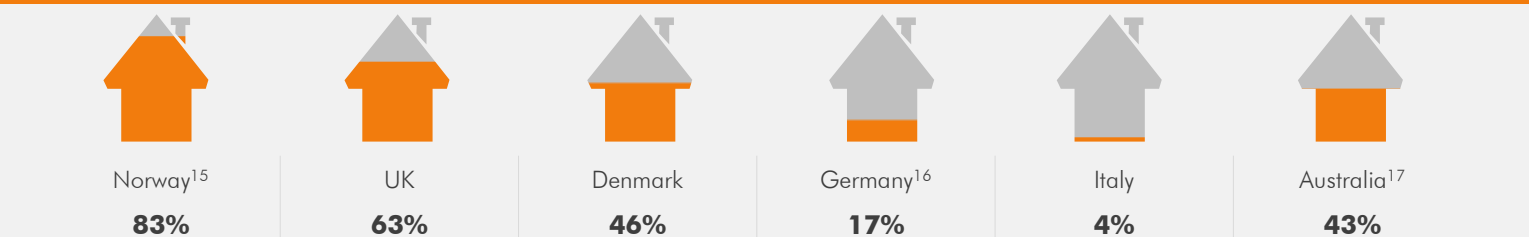


## DAB/DAB+ 1st LEVEL ROAD COVERAGE \*



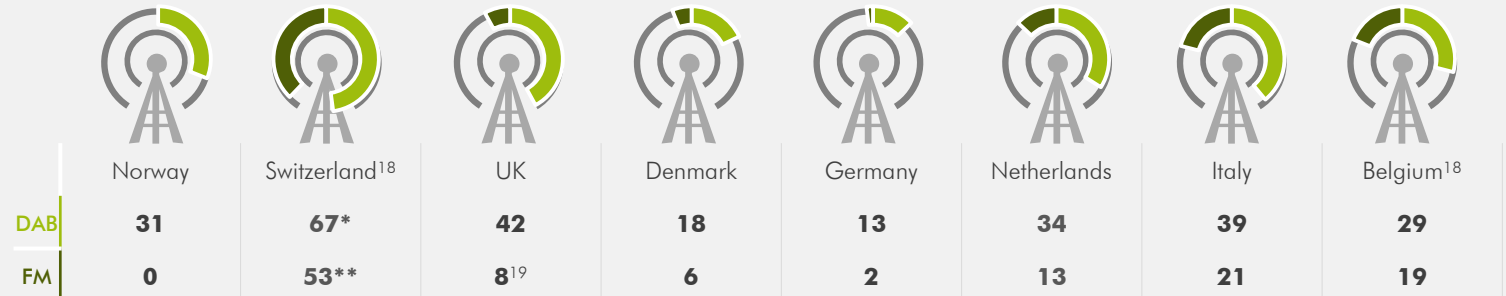
\*KM 1st level road coverage (motorways, autobahns, autostrade, autostradas, autoroutes). However most countries also have equivalent coverage on 2nd level routes. | <sup>9</sup> Goal for 2019: All 1st level tunnels longer than 300m with DAB+ | <sup>10</sup> BBC National | <sup>11</sup> National mux only, regional muxes provide further coverage | <sup>12</sup> National and local muxes, no data on 2nd level routes | <sup>13</sup> Road coverage of DAB+ area covered Flanders and Wallonia | <sup>14</sup> Road coverage of DAB+ area covered in five metropolitan capital cities

## DAB/DAB+ HOUSEHOLD RECEIVER PENETRATION



<sup>15</sup> Total digital penetration: 99% (DAB, IP or digital TV) | <sup>16</sup> As of Q2 2018, including sales starting from 2013 | <sup>17</sup> Refers to % of people who have access to a DAB+ digital radio at home, at work or in the car in the five major metropolitan areas

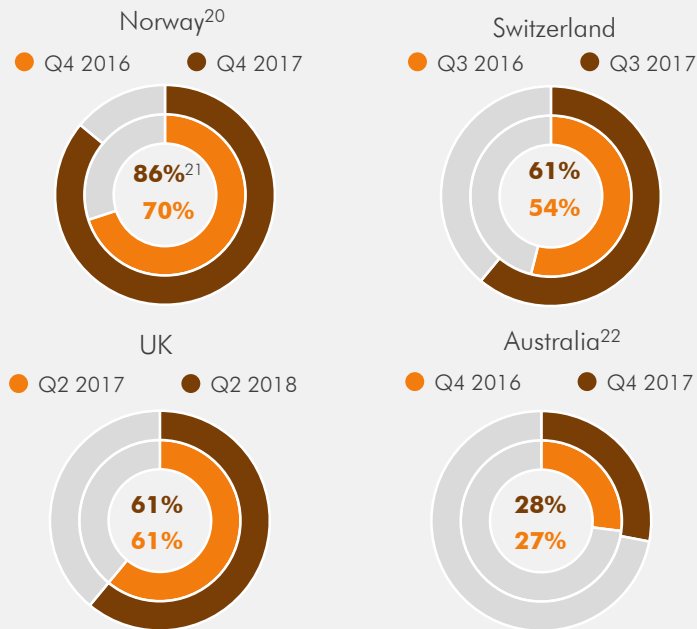
## NUMBER OF NATIONAL STATIONS ON DAB/DAB+ VS FM



18 No national stations; all stations dedicated to a language region or a region | \* exclusive DAB+ stations | \*\* simulcast DAB+ stations | 19 includes two AM services

### DIGITAL RADIO REACH ALL PLATFORMS

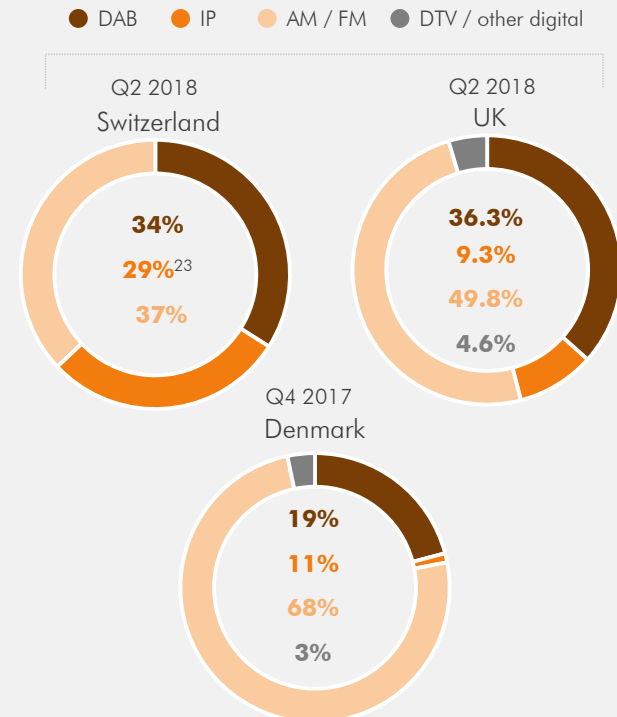
the % of people who listen to digital radio in a given time period



20 Digital reach among daily listeners | 21 Feb 2018 | 22 Simulcast listening via DAB+ and DAB+ only station listening via DAB+ or internet

### DAB/DAB+ SHARE

Total listening hours by platform, % share



23 In Switzerland, 'IP' listening includes streaming, cable and IP-TV

## EMERGING MARKETS



24 Regular DAB+ services in Nice, Marseille and Paris since 2014. Lille will bring coverage above 20% by end 2018

## DIGITAL RADIO MARKETING BODIES

Norway<sup>25</sup> – [radio.no](http://radio.no) | Switzerland – [dabplus.ch](http://dabplus.ch) | United Kingdom – [getdigitalradio.com](http://getdigitalradio.com) | Denmark – [mereradio.dk](http://mereradio.dk) | Germany – [digitalradio.de](http://digitalradio.de) | Netherlands – [digitalradio.nl](http://digitalradio.nl) | Italy – [digitalradio.it](http://digitalradio.it) | France – Alliance for Digital Radio | Australia – [digitalradioplus.com.au](http://digitalradioplus.com.au) | Austria – [digitalradio-oesterreich.com](http://digitalradio-oesterreich.com) | Belgium – [digitalradio.be](http://digitalradio.be) | Czech Republic – [rozhlas.cz/digital](http://rozhlas.cz/digital) & [digitalradiodab.cz](http://digitalradiodab.cz) | Poland – [polskieradio.pl](http://polskieradio.pl) | Slovenia – [rtvslo.si/dab](http://rtvslo.si/dab) | South Africa [sadiba.org](http://sadiba.org) | United Arab Emirates [tra.gov.ae](http://tra.gov.ae)

For a full list of sources attributable to each statistic visit the WorldDAB website. | 25 The digital switchover is completed, DRN is therefore as planned in the process of shutting down.

**DAB/DAB+ RECEIVER SALES (INCLUDING LINE FIT AUTOMOTIVE) 2008 – 2017**

Sources: Digital radio survey by Kantar Media, February 2018 (Norway), Ofcom Switzerland, GfK (Switzerland); Weer GmbH (Switzerland automotive), GfK\* (UK), SMMT/CAP automotive Q4 2017 (UK automotive), Digitisation report 2018 carried out by TNS Infratest (Germany), GfK\*, 2011-2017 GfK data for Denmark does not include Tuners and Car Radios and 2011 GfK data for Denmark does not include Clock Radio and Portable Radio (Denmark), JATO Dynamics, DAB+ as standard years 2015 to 2017 (Denmark automotive), GfK\* 2013 – 2017 (Netherlands), JATO Dynamics 2017, DAB+ as standard years 2013 – 2017 (Netherlands automotive), GfK Italia CAPI survey (Italy), digitalradio.it (Italy automotive), GfK\* (France), JATO Dynamics 2017, DAB+ as standard years 2015 to 2017 (France automotive), GfK\* 2013 – 2017 (Belgium), JATO Dynamics 2017, DAB+ as standard years 2015 – 2017 (Belgium automotive), GfK\*, data includes Smart/Mobile Phones but excludes Car Radios (aftermarket) & Tuners (Australia), Q4 2017 and Glass's Automotive Business Intelligence Dec 2017 and total sales figures supplied by vehicle manufacturers in Australia supporting DAB+ digital radio (Australia automotive)

**% NEW CARS W/DAB/DAB+**

Sources: Estimate by national broadcasters and Digitalradio Norway, based on general info on DAB+ availability from each car importer. Currently no local official statistic is available to track DAB+ ratio in the Norwegian market for new cars. Cars without line fit DAB-radios are given retrofit solutions locally. The estimate includes private cars only (Norway), JATO Dynamics 2017 (Denmark, Netherlands, France, Belgium), SMMT/CAP automotive Q2 2018 (UK), Weer GmbH (Switzerland), DAT/VDA report 2018 (Germany), JATO Dynamics 2017 and digitalradio.it (Italy), Glass's Automotive Business Intelligence Dec 2017, Commercial Radio Australia (Australia)

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

**TOTAL DAB/DAB+ NETWORK COVERAGE (% OF POPULATION) 2013 VS 2017**

Sources: Norkring AS (Norway), BBC (UK), OFCOM (Switzerland), Media Broadcast (Germany), Teracom (Denmark), Digital Radio NL (Netherlands), digitalradio.it (Italy), WorldDAB (France), RTBF and Norkring Belgium (Belgium), Commercial Radio Australia (Australia)

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

Sources: Norkring AS (Norway), BBC (UK), SRG, SSR, OFCOM (Switzerland), Media Broadcast (Germany), Teracom (Denmark), Digital Radio NL (Netherlands), digitalradio.it (Italy), Estimation RTBF and Norkring Belgium (Belgium), Commercial Radio Australia (Australia)

**DAB/DAB+ HOUSEHOLD RECEIVER PENETRATION**

Sources: Digital radio survey by Kantar TNS May 2017 (Norway), Q2 2018. RAJAR/Ipsos MORI/RSMB (62.5% of adult population claim to have access to a DAB set in their home) (United Kingdom), Digitisation report 2018 carried out by TNS Infratest (Germany), DR 2014 (Denmark), digitalradio.it (Italy), GfK Radio Ratings, Surveys 6-8, 2017 (Australia)

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

Sources: WorldDAB

**DIGITAL RADIO REACH - ALL PLATFORMS**

Sources: GfK Australia, Surveys 6-8, 2017 SMBAP, Cumulative audience, Monday to Sunday, 5.30am to midnight (Australia), DigiMig Trendanalyse 01.2018 (Switzerland), Digital radio survey by Kantar Media, February 2018 (Norway), Q2 2018. RAJAR/Ipsos MORI/RSMB (United Kingdom)

**DAB/DAB+ SHARE**

Sources: DigiMig Trendanalyse 30.08.2018 (Switzerland), Q2 2018. RAJAR/Ipsos MORI/RSMB (United Kingdom), Q4 2017 Gallup/DR, only available for public service channels (Denmark)

**EMERGING MARKETS**

Sources: Verein Digitalradio Österreich (Austria), Czech Radio, RTI cz s.r.o., TELEKO s.r.o. (Czech Republic), Estonian Public Broadcasting (ERR) (Estonia), WorldDAB with industry inputs (France), National Media and Infocommunications Authority Hungary (Hungary), RRI (Indonesia), Ministry of Information Kuwait (Kuwait), LVRTC (Latvia), WorldDAB (Malta), Polish Radio (Poland), Radio Romania (Romania), RTV Slovenija (Slovenia), VÚS (Research Institute of Posts and Telecommunications, Slovakia (Slovakia), ICASA (South Africa), WorldDAB (Tunisia), 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. The DAB+ Fusion report includes the product categories: Audio Home Systems, Tuners, Receivers, Clock Radios, Portable Radios, Radio Recorders and Car Radios (aftermarket).