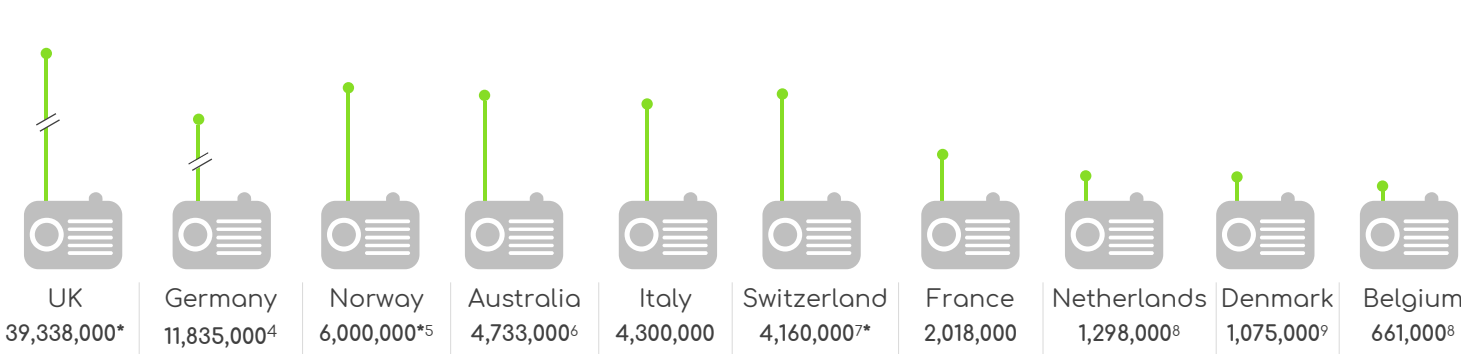


## GOVERNMENT POLICY STATUS

Norway – the digital switchover completed for all national radio Dec 2017 | Switzerland – DSO planned for 2024 at the latest<sup>1</sup> | United Kingdom – on 13 May 2019, the UK Government announced that they will begin a review of digital radio in the coming weeks which will conclude in the middle of 2020 | Denmark – timing of DSO to be decided when 50% of listening is digital | Germany – digital radio roadmap published by authorities Feb 2017 | Netherlands – fastest DAB+ launch, backed by Government support | Italy – from 2020 it will be mandatory for all radios sold to have DAB+ | France – all receivers will have to be DAB+ capable in 2020 as 21.3% coverage was recognised in 2018<sup>2</sup>; national coverage with the public service and the main national broadcasters will start in 2020 | Belgium<sup>3</sup> – Flemish and French speaking governments committed to a digital radio future with DAB+ at its core | Australia – DAB+ in 6 metropolitan and 1 regional areas 65% population coverage; planning underway for other markets

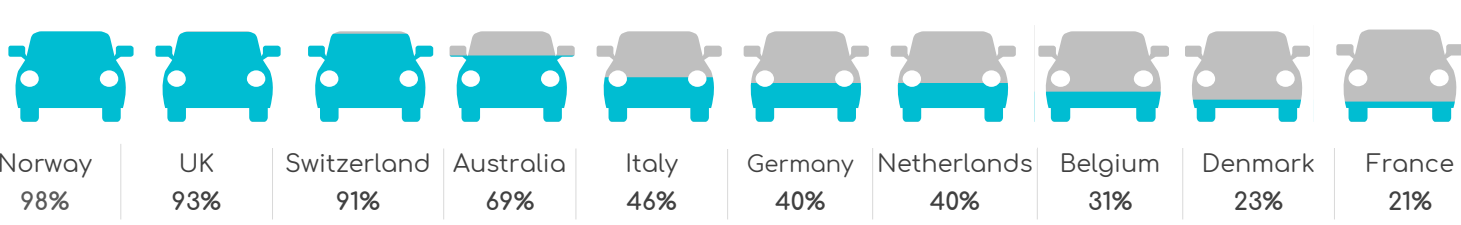
1 Commitment of the industry; communication of DSO-Date planned for Q3 2019 | 2 From January 2020 for most domestic receivers and July 2020 for automotive | 3 Belgium Fl: DAB+ official launch 1/9/2018. Belgium Fr: official launch September 2019

## CUMULATIVE DAB/DAB+ RECEIVER SALES (INCLUDING LINE FIT AUTOMOTIVE) 2008 – 2018

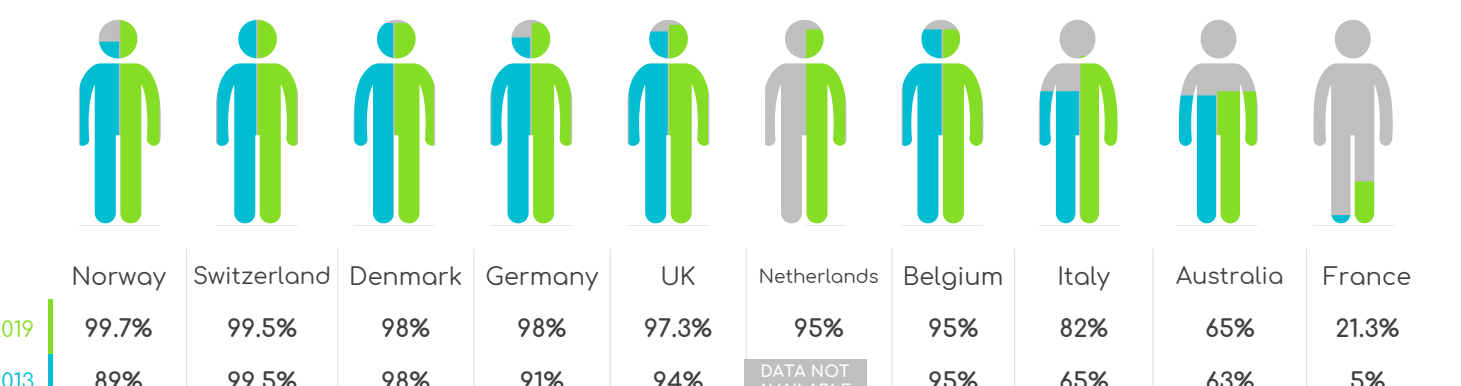


\* including pre 2008 sales | 4 As of Q2 2018, including sales starting from 2013 | 5 Q1 2019 | 6 including sales from 2009-2018 | 7 including DAB+ devices and automotive line-fit sales up to Q4 2018 | 8 contains only DAB+ sales starting from 2013 | 9 including sales starting from 2011

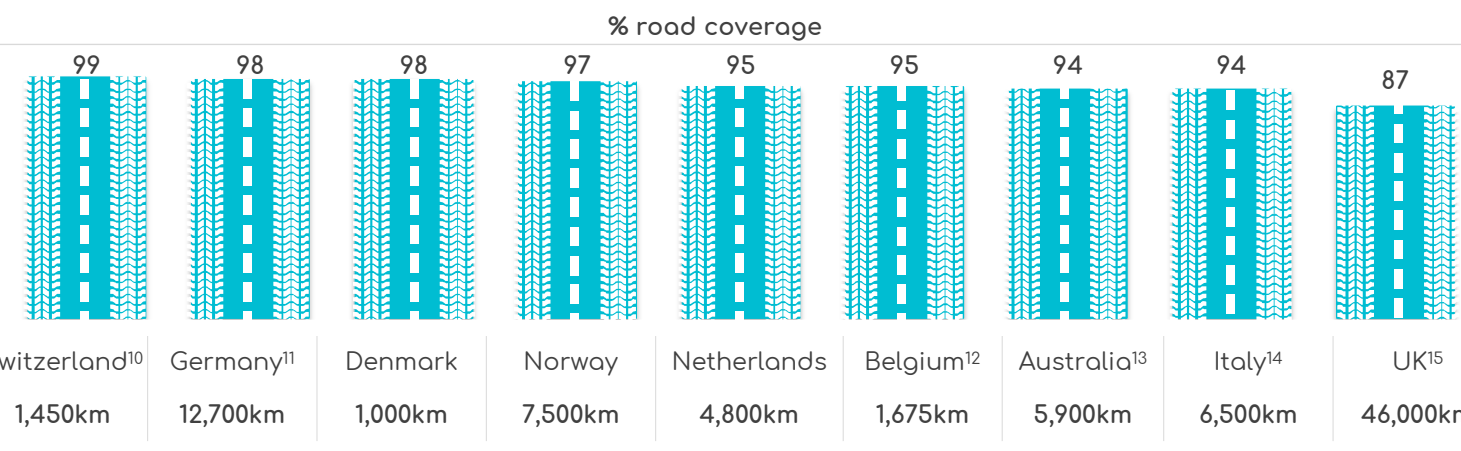
## % NEW CARS W/DAB/DAB+



## TOTAL DAB/DAB+ NETWORK COVERAGE (% OF POPULATION) 2013 VS 2019

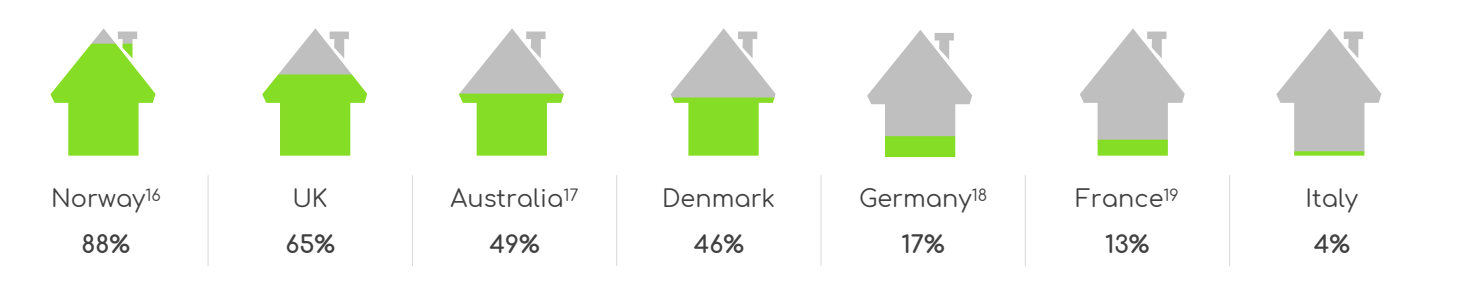


## DAB/DAB+ 1st LEVEL ROAD COVERAGE \*



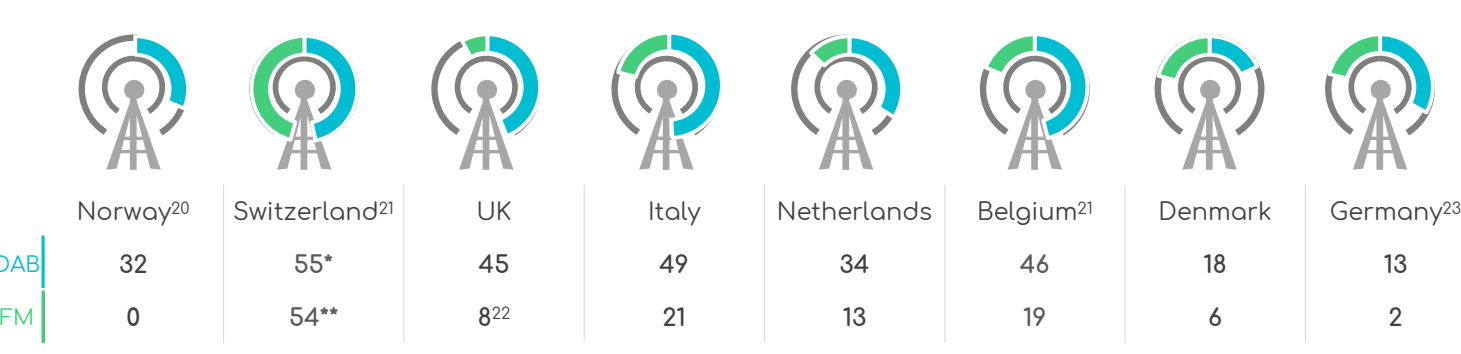
\*KM 1st level road coverage (motorways, autobahns, autostrade, autostradas, autoroutes). However most countries also have equivalent coverage on 2nd level routes. | 10 Goal for the end of 2019: All 1st level tunnels longer than 300m with DAB+ | 11 National mux only, regional muxes provide further coverage | 12 Road coverage of DAB+ area covered Flanders and Wallonia | 13 Road coverage of DAB+ area covered in 6 metropolitan and 1 regional areas | 14 National and local muxes, no data on 2nd level routes | 15 BBC National

## DAB/DAB+ HOUSEHOLD RECEIVER PENETRATION



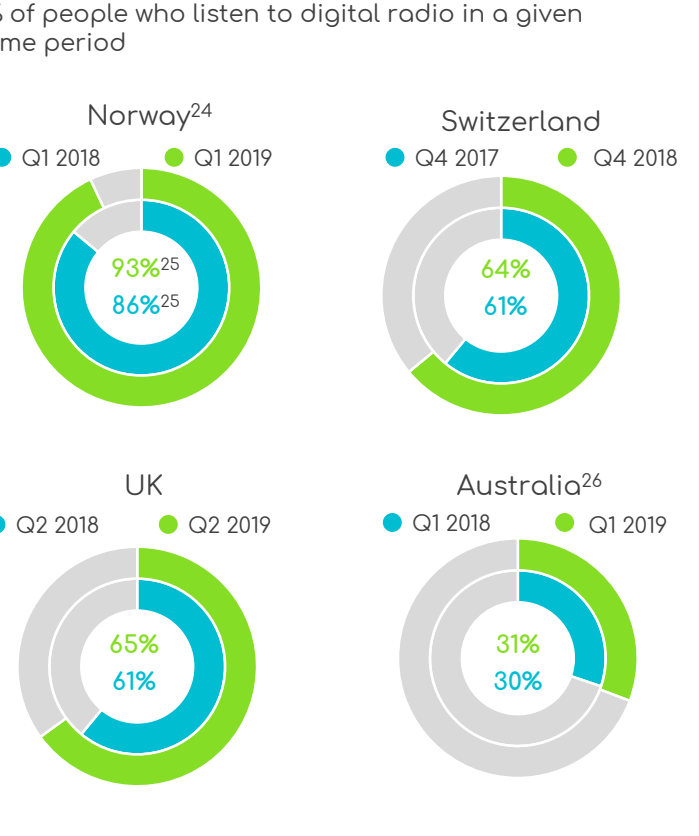
16 Total digital penetration: 99% (DAB, IP or digital TV) as of Q1 2019 | 17 Refers to % of people who have access to a DAB+ digital radio at home, at work or in the car in the five major metropolitan areas, as of Q1 2019 | 18 As of Q2 2018, including sales starting from 2013 | 19 2018, 13% of individuals have access to a DAB+ home receiver

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

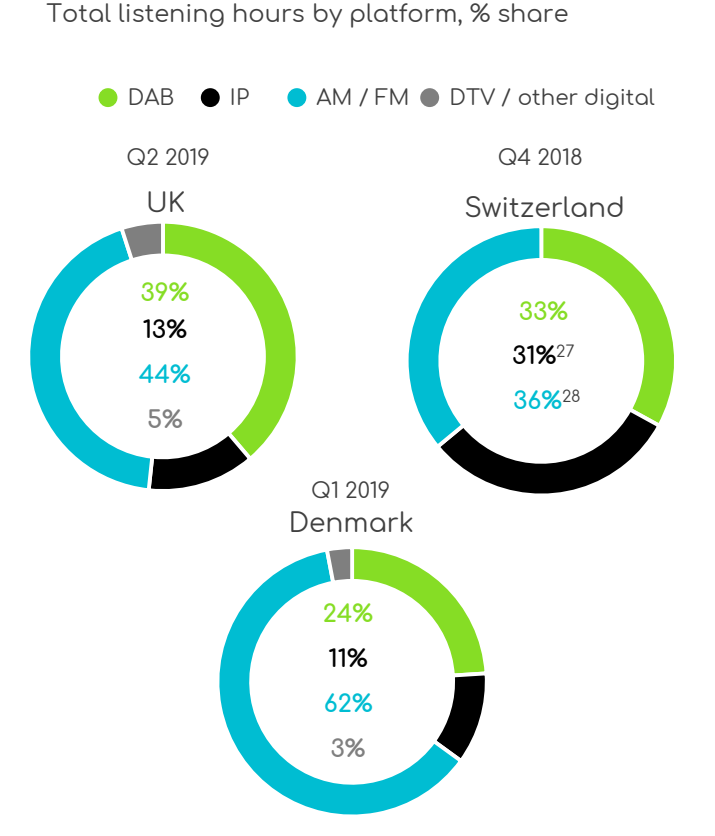


20 FM before 2017 had 5 national stations | 21 No national stations; all stations dedicated to a language region or a region | \* exclusive DAB+ stations | \*\* simulcast DAB+ stations | 22 includes two AM services | 23 up to 250 regional DAB+ programmes available

## DIGITAL RADIO REACH ALL PLATFORMS



## DAB/DAB+ SHARE



24 Digital reach among daily listeners | 25 Reach among daily listeners of national radio is 100% | 26 Simulcast listening via DAB+ and DAB+ only station listening via any platform | 27 In Switzerland, 'IP' listening includes streaming, cable and IP-TV | 28 FM only: 18%

## EMERGING MARKETS



% coverage refers to population coverage | 29 Expected to reach 80% by end 2019 | 30 Population coverage of Regular national DAB multiplex. A small scale Regular Trial DAB multiplex launched in Cork in August 2019 and provides additional coverage (5.25%) | 31 Population coverage of 17 Regular regional DAB+ multiplexes. 6 Trial local DAB+ multiplexes are also on air and provide additional coverage. | 32 Strategy document for transition to digital radio expected Q2 2019 | 33 Regulator will develop the draft regulations on Digital Sound Broadcasting in the current financial year (2019/20) | 34 Population coverage of Regular national DAB multiplex. Population coverage of Regular national DAB multiplex for public service. A national DAB+ multiplex for commercial radio is currently on air covering 22% of the population on a trial basis.

## DIGITAL RADIO MARKETING BODIES

Norway<sup>35</sup> – [radio.no](http://radio.no) | Switzerland – [dabplus.ch](http://dabplus.ch) <sup>36</sup> | United Kingdom – [getdigitalradio.com](http://getdigitalradio.com) | Denmark – [mereradio.dk](http://mereradio.dk) | Germany – [dabplus.de](http://dabplus.de) | Netherlands – [digitalradio.nl](http://digitalradio.nl) | Italy – [digitalradio.it](http://digitalradio.it) | France – [dabplus.fr](http://dabplus.fr) | Australia – [digitalradioplus.com.au](http://digitalradioplus.com.au) | Austria – [dabplus.at](http://dabplus.at) | Belgium – [dabplus.be](http://dabplus.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) |

35 The digital switchover is completed, DRN is therefore as planned shut down | 36 Marketing campaign (2017 - 2024) of OFCOM Switzerland

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