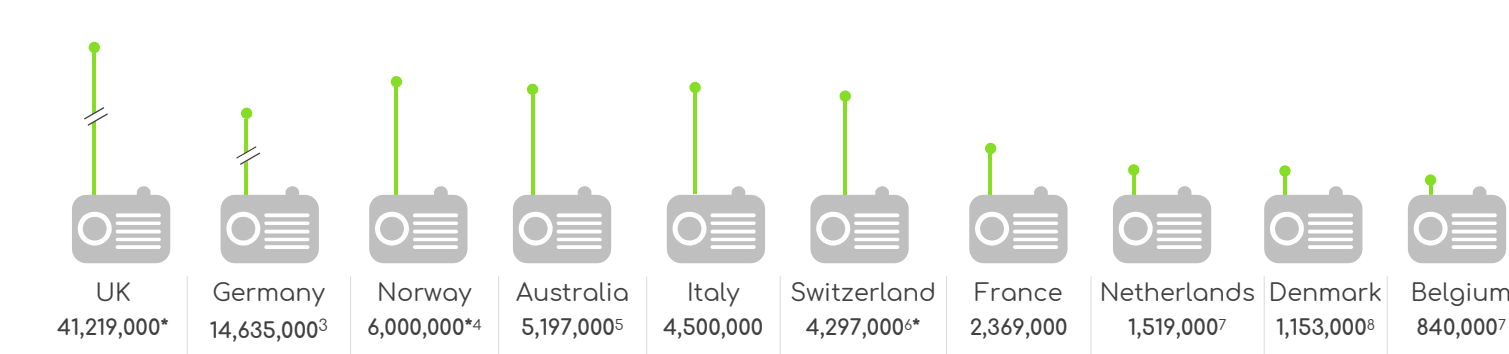


GOVERNMENT POLICY STATUS

Norway – the digital switchover completed for all national radio Dec 2017 | Switzerland – DSO planned for 2024 at the latest¹ | United Kingdom – in May 2019 the UK Government announced a review of digital radio and audio which is now underway and is expected to conclude at the end 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 2020²; Parliament currently reviewing receiver requirements in line with the EEC; national coverage by commercial and public broadcasters will start in 2020 | Belgium – 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

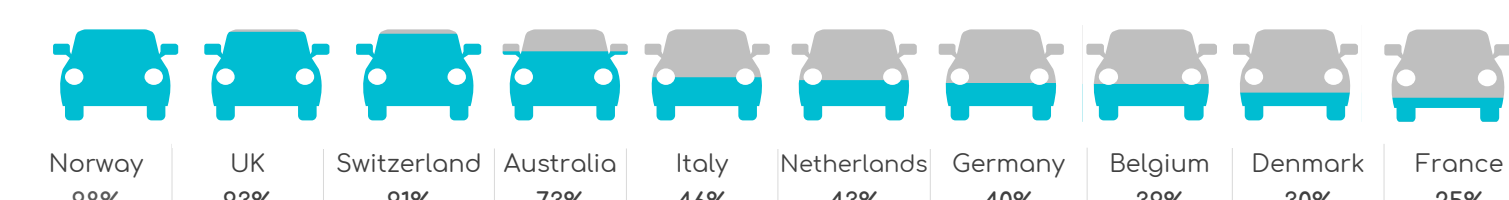
1 Commitment of the industry; communication of earlier DSO-Date planned for Q1 2021 | 2 From January 2020 for most domestic receivers and July 2020 for automotive

CUMULATIVE DAB/DAB+ RECEIVER SALES (INCLUDING LINE FIT AUTOMOTIVE) 2008 – H1 2019

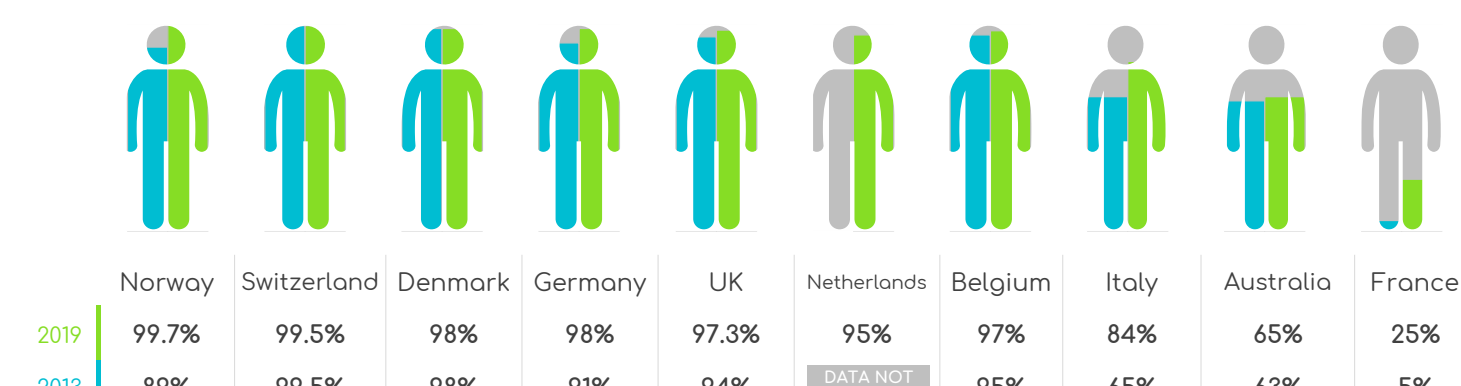


* including pre 2008 sales | 3 As of Q2 2018, including sales starting from 2013 | 4 Q1 2019 | 5 including sales from 2009-Q2 2019 | 6 automotive line-fit sales up to Q4 2018 | 7 contains only DAB+ sales starting from 2013 | 8 including sales starting from 2011

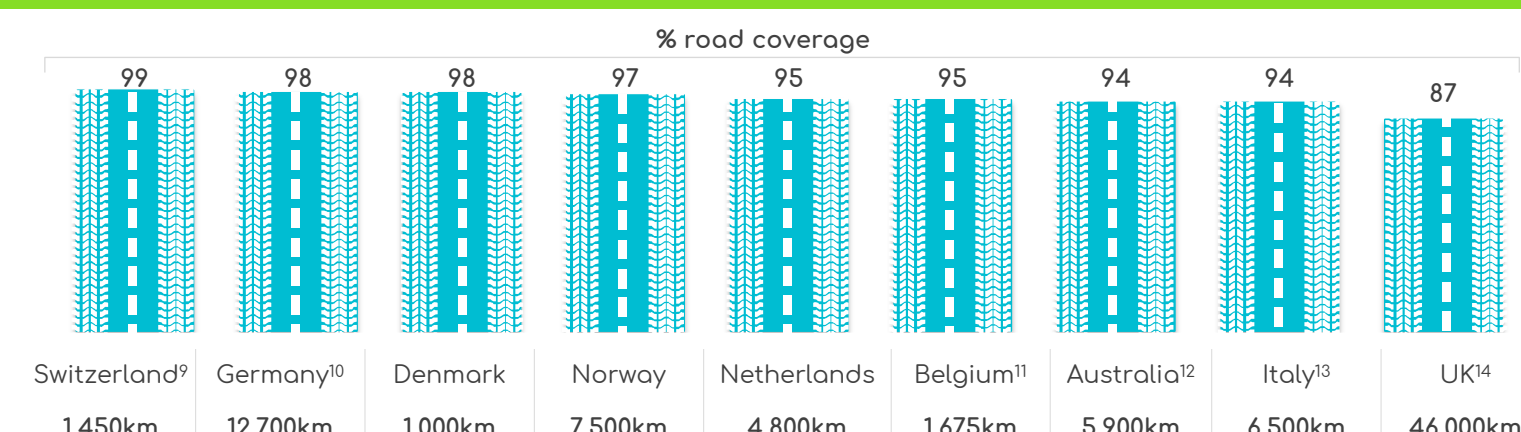
% NEW CARS W/DAB/DAB+



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

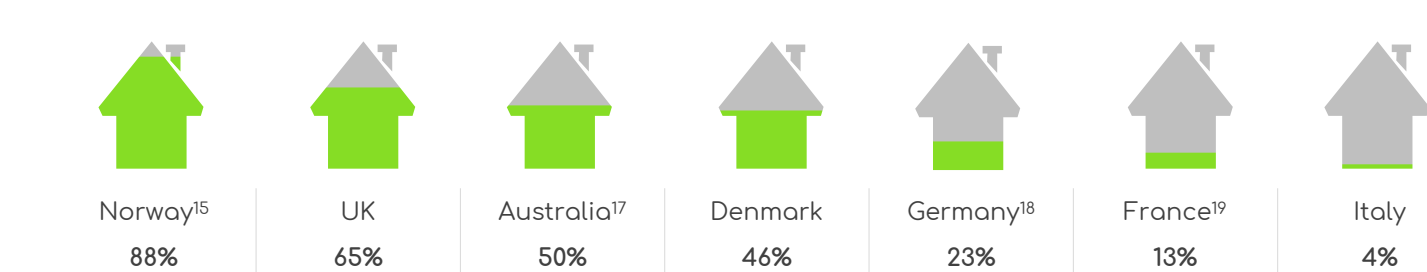


DAB/DAB+ 1st LEVEL ROAD COVERAGE *



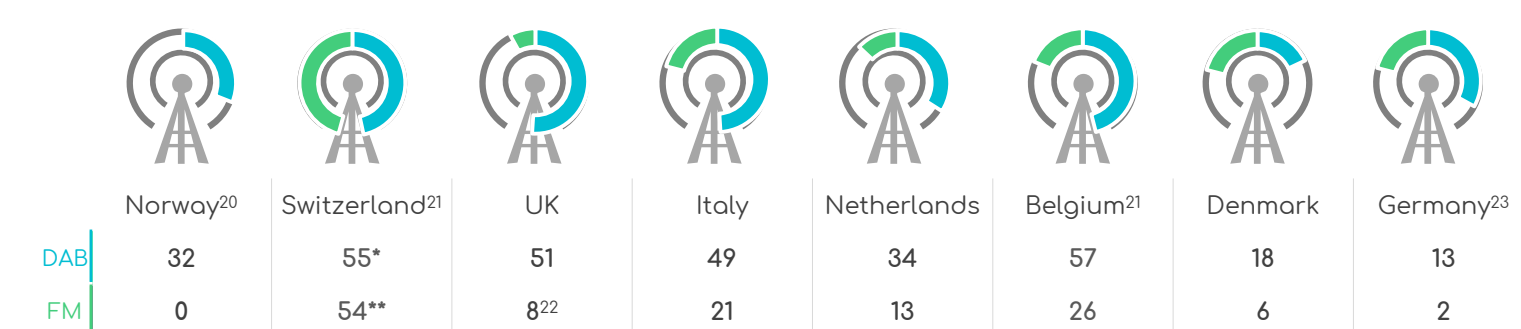
*KM 1st level road coverage (motorways, autobahns, autostrade, autostradas, autoroutes). However most countries also have equivalent coverage on 2nd level routes. | 9 Goal for the end of 2019: All 1st level tunnels longer than 300m with DAB+ | 10 National mux only, regional muxes provide further coverage | 11 Road coverage of DAB+ area covered Flanders and Wallonia | 12 Road coverage of DAB+ area covered in 6 metropolitan and 1 regional areas | 13 National and local muxes, no data on 2nd level routes | 14 BBC National

DAB/DAB+ HOUSEHOLD RECEIVER PENETRATION



15 Total digital penetration: 99% (DAB, IP or digital TV) as of Q1 2019 | 16 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 Q2 2019 | 17 including cars | 18 As of Q2 2019, including sales starting from 2013 | 19 2018, 13% of individuals have access to a DAB+ home receiver

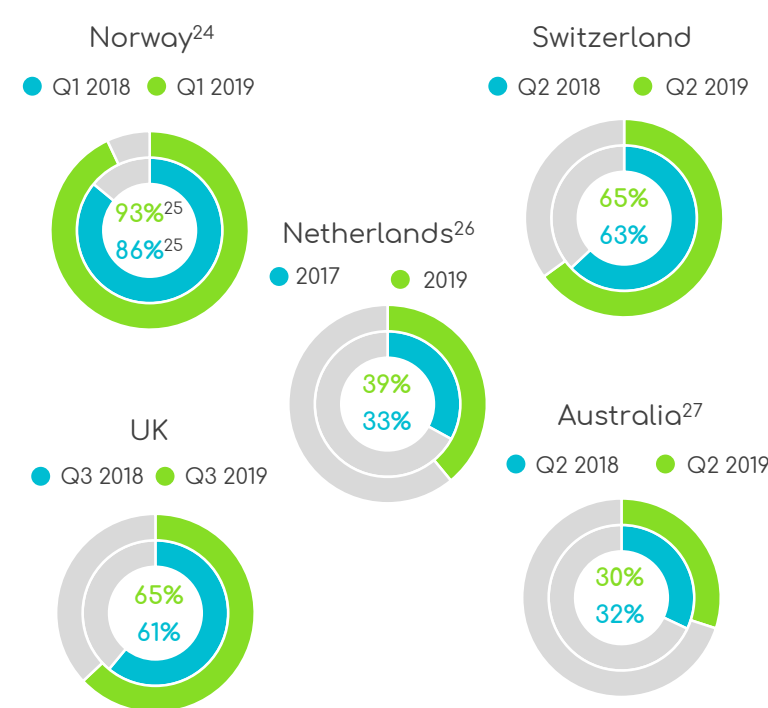
NUMBER OF NATIONAL STATIONS ON DAB/DAB+ VS FM



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

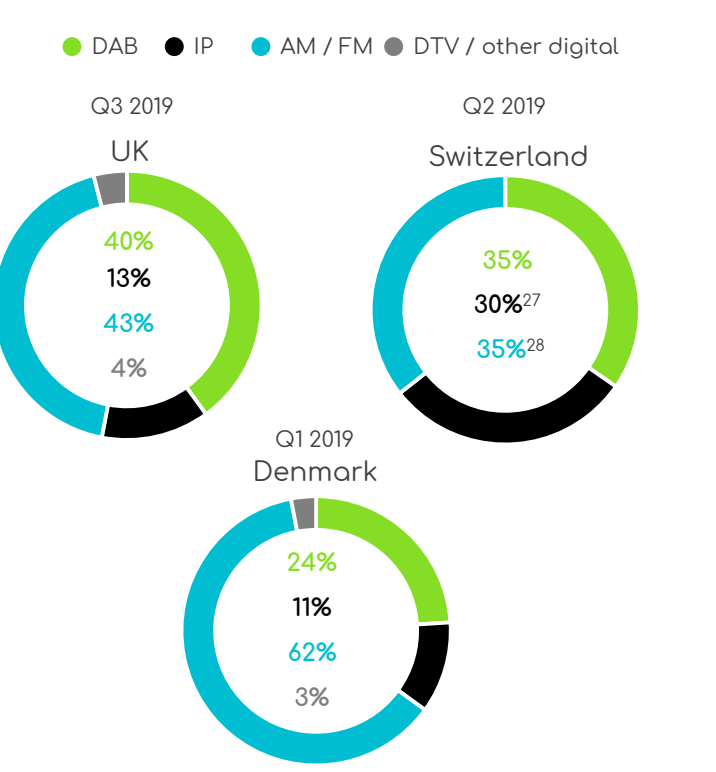
DIGITAL RADIO REACH ALL PLATFORMS

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



DAB/DAB+ SHARE

Total listening hours by platform, % share



24 Digital reach among daily listeners | 25 Reach among daily listeners of national radio is 100% | 26 Digital listening measured every other year in NL | 27 Simulcast listening via DAB+ and DAB+ only station listening via any platform | 28 In Switzerland, 'IP' listening includes streaming, cable and IP-TV | 29 FM only: 17%

EMERGING MARKETS



% coverage refers to population coverage | 30 Population coverage of 17 Regular regional DAB+ multiplexes, 82% popn coverage by Oct 2022. 6 Trial local DAB+ multiplexes are also on air and provide additional coverage. | 31 New multiplexes anticipated 2020 | 32 Regulator will develop the draft regulations on Digital Sound Broadcasting in the current financial year (2019/20) | 33 Population coverage of Regular national DAB multiplex for public service. A national DAB+ multiplex for commercial radio is currently on air and will reach 43% of the population by end 2019.

DIGITAL RADIO MARKETING BODIES

Norway³⁴ – radio.no | Switzerland – dabplus.ch³⁵ | United Kingdom – getdigitalradio.com | Denmark – mereradio.dk | Germany – dabplus.de | Netherlands – digitalradio.nl | Italy – digitalradio.it | France – dabplus.fr | Australia – digitalradioplus.com.au | Austria – dabplus.at | Belgium – dabplus.be | Czech Republic – rozhlas.cz/digital & digitalradiodab.cz | Poland – polskieradio.pl | Slovenia – rtvslo.si/dab |

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