

JUNE 21st

AVAILABILITY OF DIGITAL RADIO HISTORY – PRESENT - FUTURE

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OUR KNOWLEDGE IS YOUR **POWER**

ABOUT JATO

WHO WE ARE AND WHAT WE DO

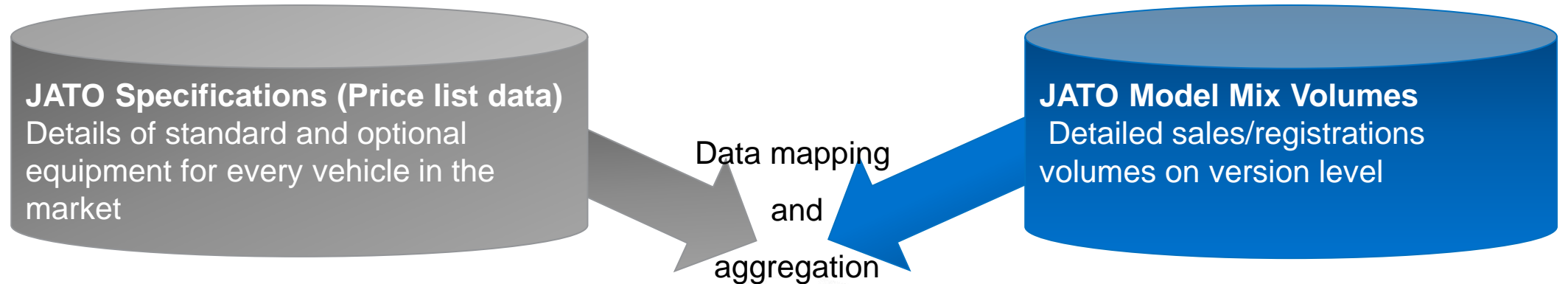
- The leading global supplier of **automotive intelligence**
- Founded in **1984**, by **Jake Shafran**
- Ca. **620 people** in 51 locations worldwide covering more than **56 markets**.
- Provider of the most comprehensive data sets on **Vehicle Specifications, Volumes, Volumes Forecast, Incentives, Transactions**
- **Information & solutions** that create **transparency** in the market for **our customers**

OUR
KNOWLEDGE
IS YOUR
POWER



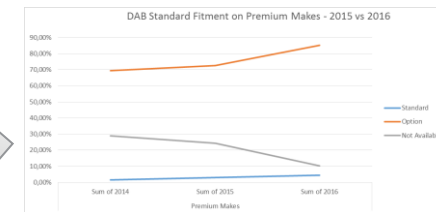
STANDARD FITMENT RATE ANALYSIS

THE METHOD

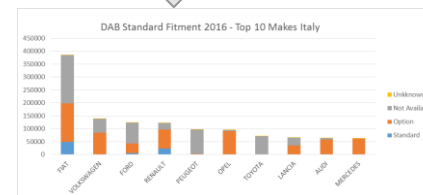


Standard Fitment Rate

- Share of vehicles sold where an equipment is *not available, available as an option or standard*
- No direct info about *Option Take Rate!*
- *Standard Fitment Rate* indicates:
 - ⇒ *Must Have vs Nice to Have equipment*
 - ⇒ Supports analysis on future development Standard Fitments



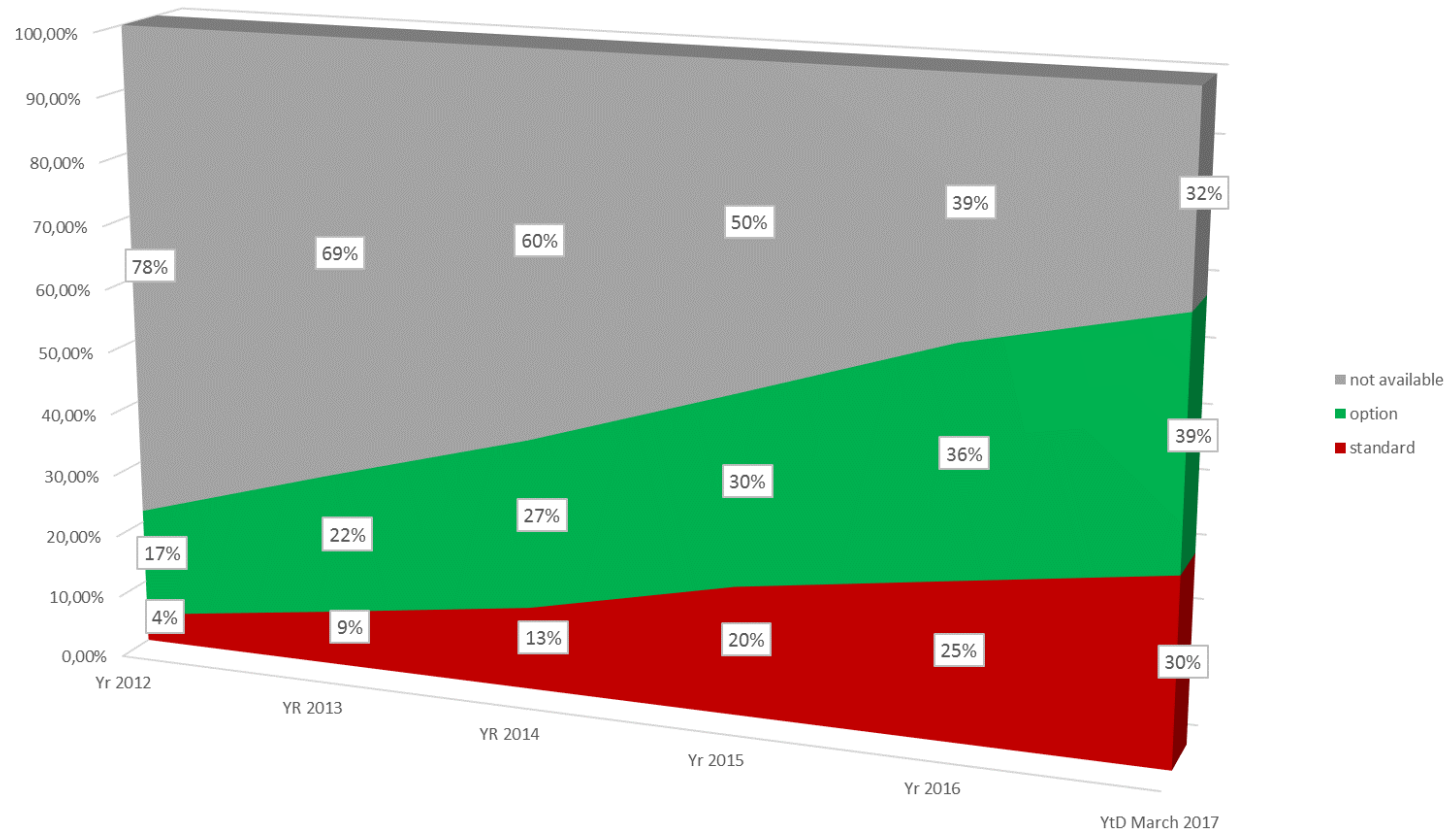
Row Label	Standard	Option	Not Available	Unknown	Grand Total
Denmark	10,31%	49,63%	36,29%	3,77%	100,00%
France	15,82%	18,21%	58,84%	7,13%	100,00%
Germany	9,78%	71,08%	17,69%	1,45%	100,00%
Italy	8,09%	48,66%	42,88%	0,37%	100,00%
Norway	83,17%	3,11%	11,95%	1,77%	100,00%
Switzerland	53,20%	35,06%	11,16%	0,59%	100,00%
The Netherlands	25,59%	43,93%	28,90%	1,58%	100,00%
Grand Tot	14,66%	48,76%	33,95%	2,63%	100,00%



THE RISE OF DIGITAL RADIO IN CARS

INCREASING AVAILABILITY IN EUROPE

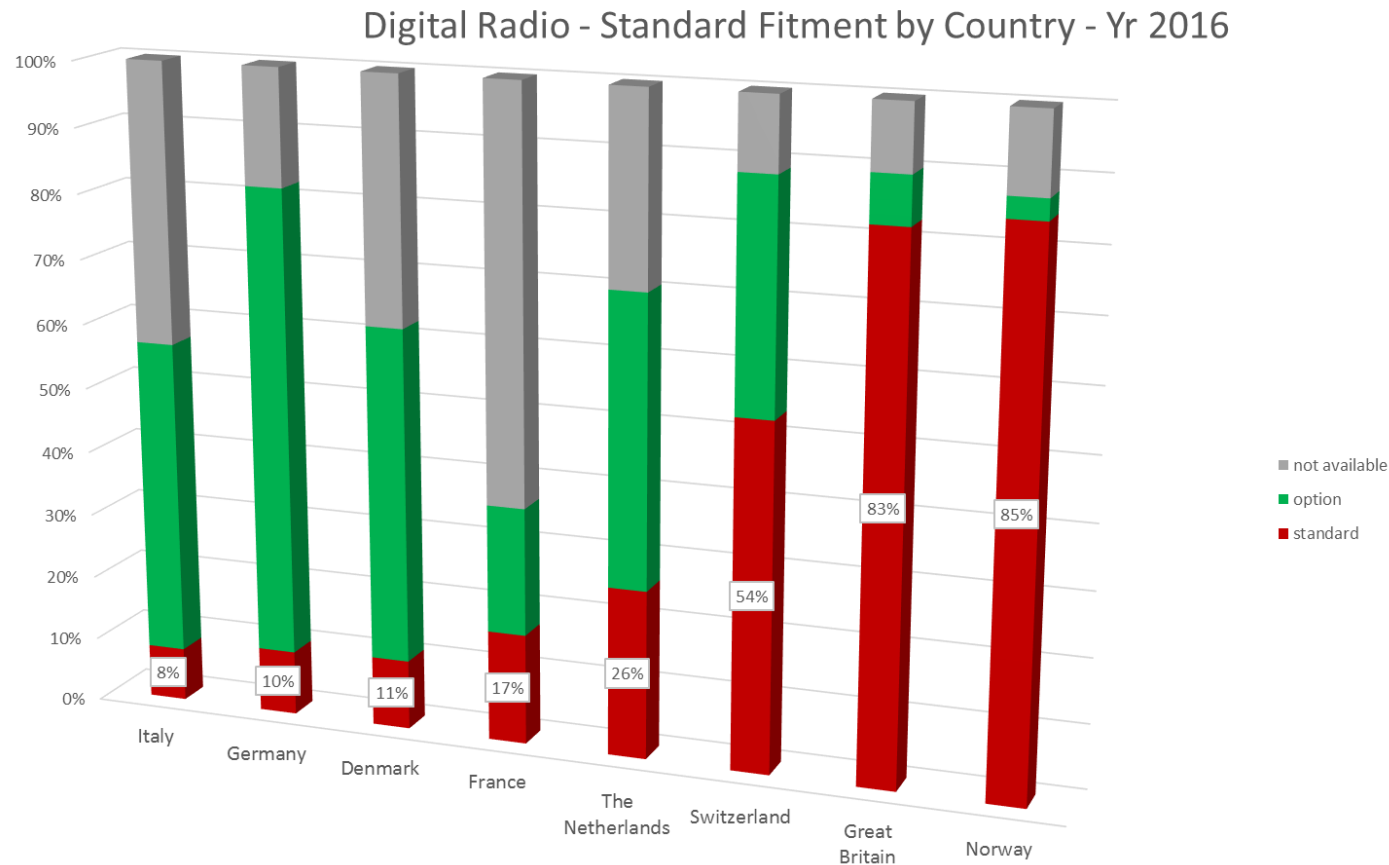
Standard Fitment of Digital Radio in Europe



- Strong growth of availability of *Digital Radio* since 2012
- Increase of vehicles fitted with *Digital Radio* as *Standard* from ca. 4% - 30%
- Share of vehicles offering *Digital Radio* as an *Option* grew from 17 % to 39%

DIGITAL RADIO IN DIFFERENT MARKET PLACES

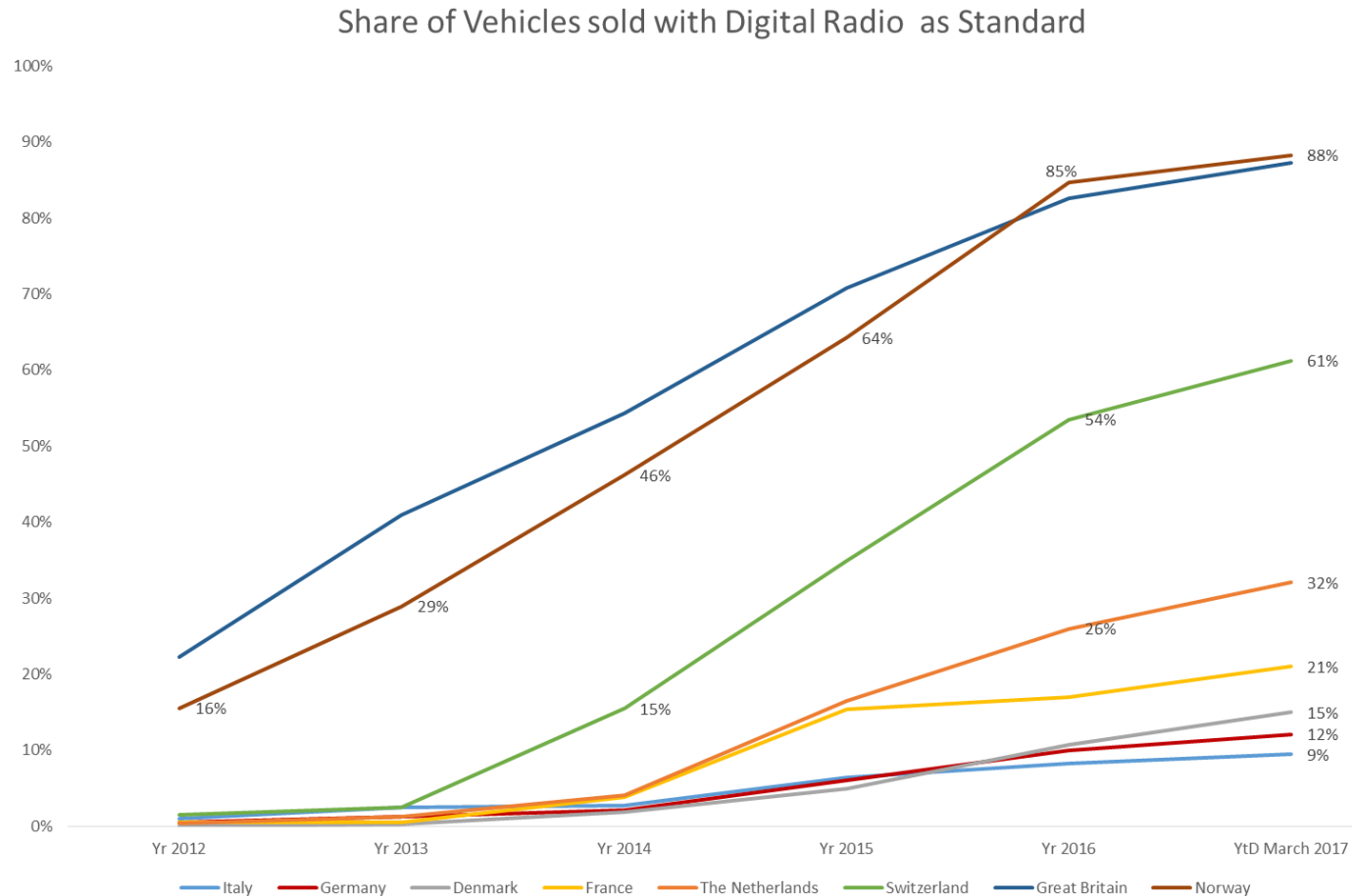
MARKET DIFFERENCES IN STANDARD FITMENT



- In Norway and Great Britain *Digital Radio* is a **standard** on over 80% of vehicles sold
- In other markets lower share of vehicles with *Digital Radio* as **standard**
- In most markets availability of *Digital Radio* as standard or option is above 50%

DEVELOPMENT OF STANDARD FITMENT BY COUNTRY

DIGITAL RADIO AS STANDARD EQUIPMENT

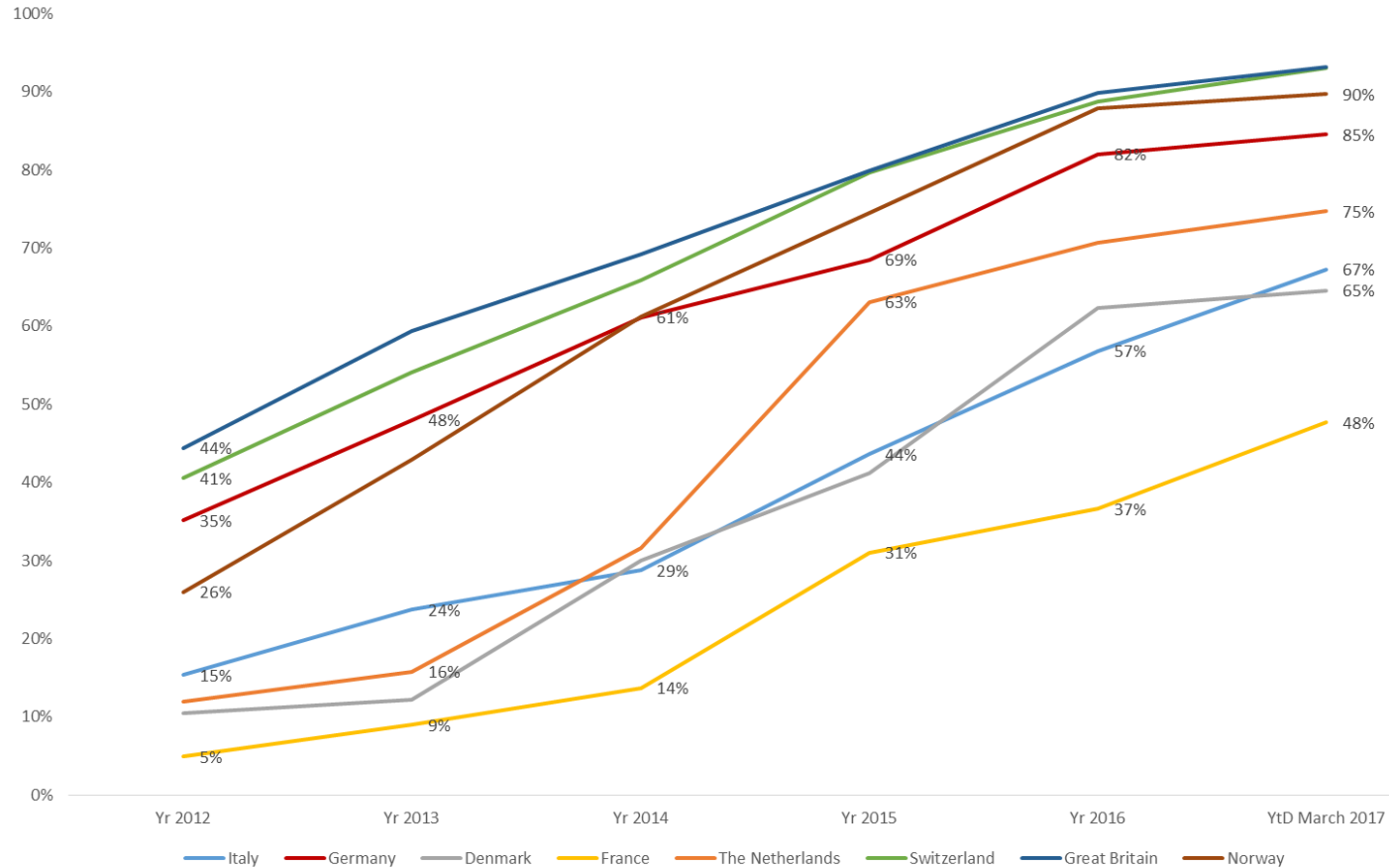


- *Digital Radio* as Standard equipment growing steadily in the last years
- GB and Norway: Penetration as *Standard Equipment* from ca. 20%-over 80% in less than five years

DEVELOPMENT OF STANDARD FITMENT BY COUNTRY

AVAILABILITY OF DIGITAL RADIO AS STANDAR OR OPTION

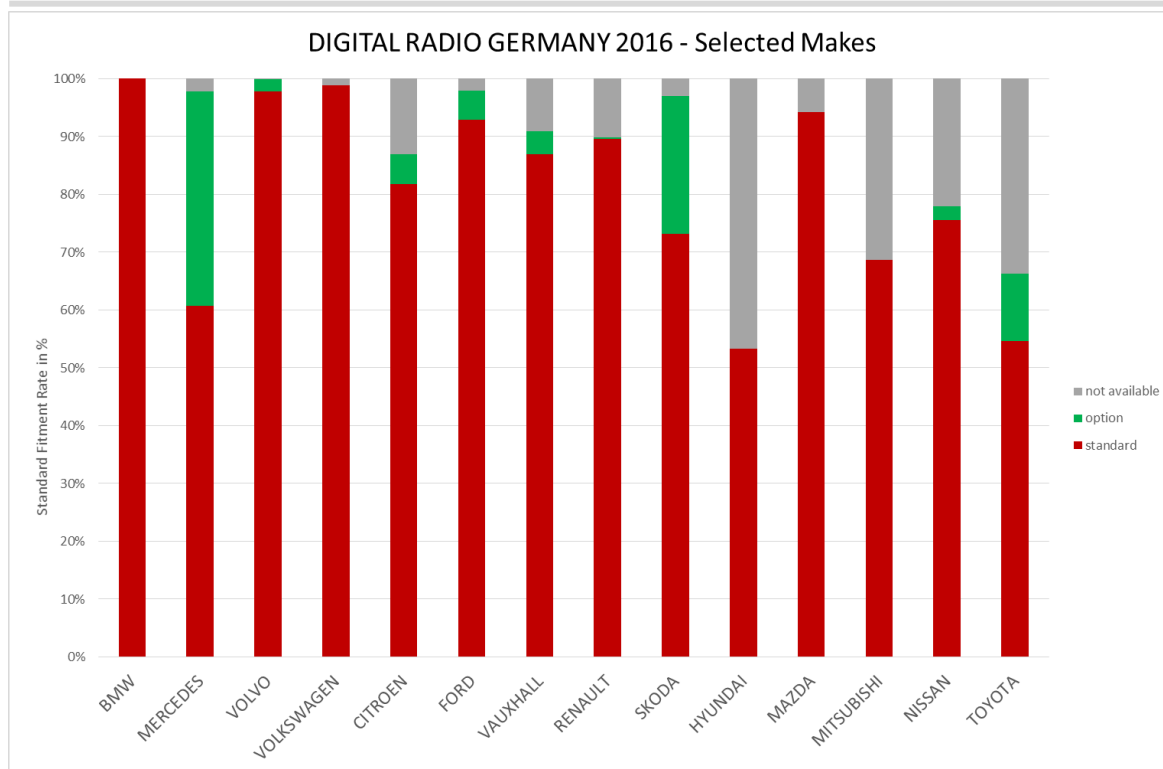
Share of Vehicles with Digital Radio available as Standard or Option



- Availability (*Standard* or *Option*) of *Digital Radio* has been growing rapidly
- In 2017 *Digital Radio* is a **MUST HAVE** in an OEMs product offering

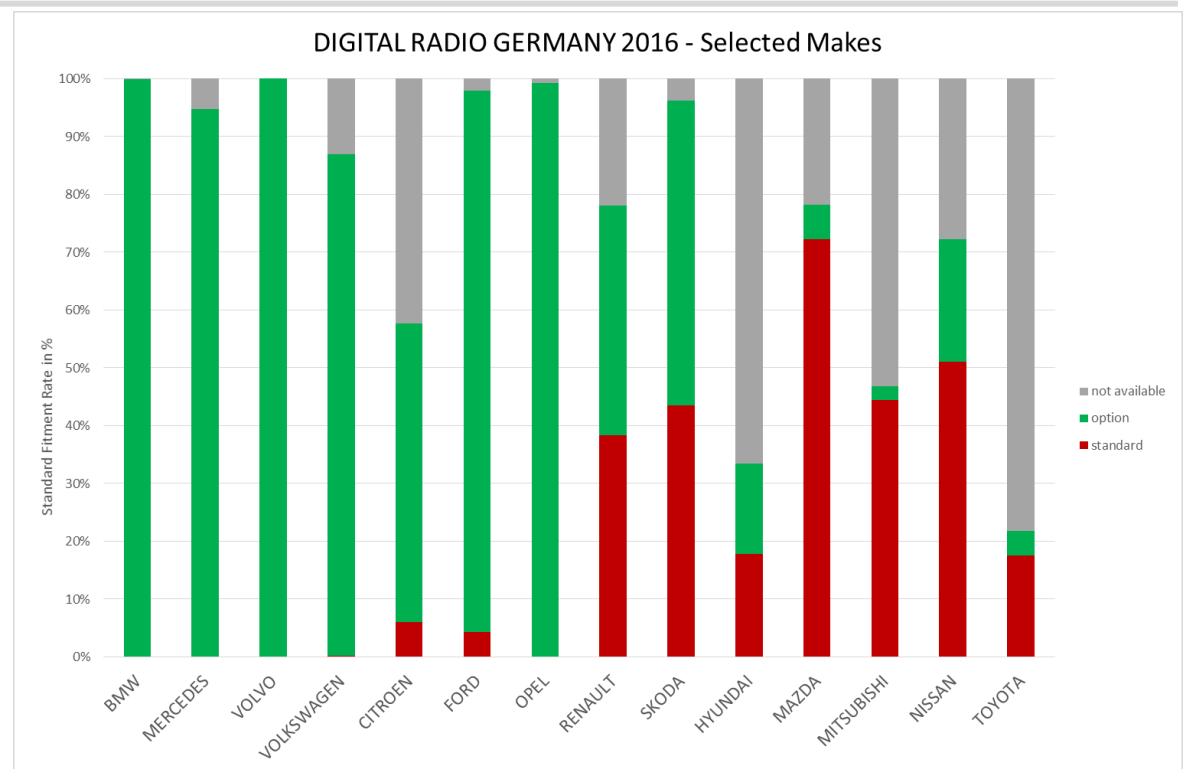
STANDARD FITMENT BY BRAND

BRAND STRATEGIES – GREAT BRITAIN vs GERMANY



Great Britain

- *Digital Radio standard* in most brands



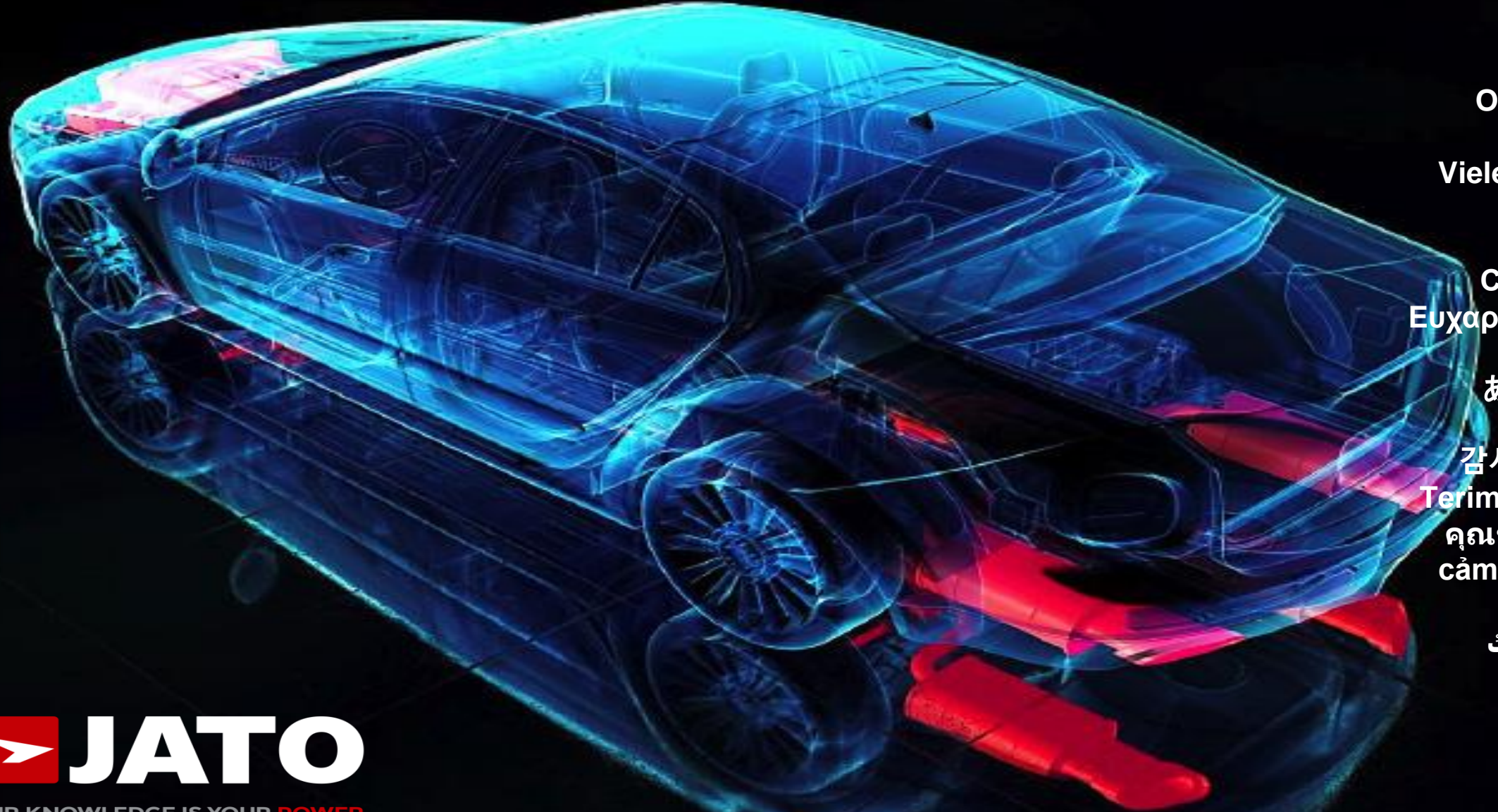
Germany

- Premium brands tend to offer *Digital Radio* as *option*
- Japanese manufacturers often high share of *standard*
- Mixed strategies in European non-premium brands
- DAB standard mostly only on **higher trims** only

DIGITAL RADIO IN THE CAR IN FIVE YEARS

SUMMARY

- The Standard Fitment Analysis has shown a major increase in the availability of *Digital Radio* in cars
 - The development of the Standard Fitment rates of *Digital Radio* in the last five year indicates further growth in the next years
 - *Digital Radio* is available for car buyers, with major differences by country and brand
- ⇒ **Development of *Digital Radio* fitment in the next five years depend on**
- Environment & customer acceptance in different countries
 - Brand strategies
 - Development of other media, i.e. internet & streaming services



Thank You

- Merci
- Gracias
- Grazie
- Obrigado
- Tack
- Vielen Dank
- Dank U
- Kiitos
- Спасибо
- Ευχαριστούμε
- תודה
- ありがとう
- 谢谢
- 감사합니다
- Terima Kasih
- คุณขอบคุณ
- cảm ơn bạn
- धन्यवाद
- شكرا لك