

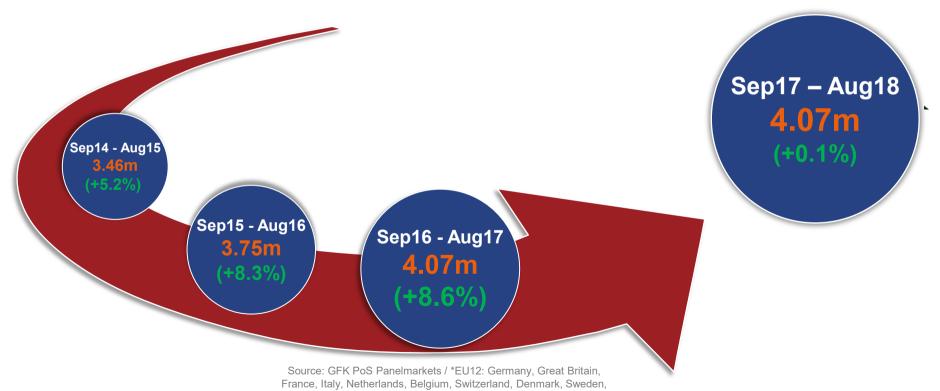
## DAB Market – Current status and threads

## WorldDAB General Assembly Berlin | 07th November 2018

Jan Lorbach | Regional Senior Market Insights Manager

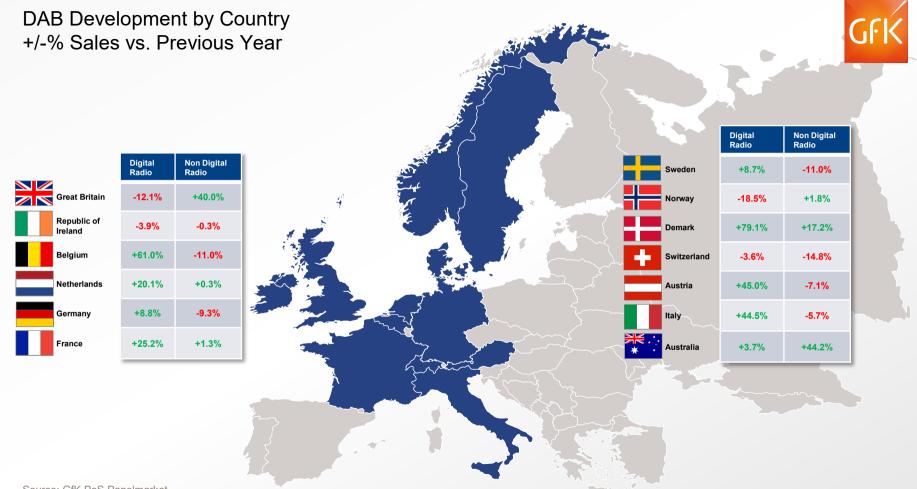
DAB device sales in Europe12\* + Australia: Strong growth in recent years, latest performance has slowed down





Norway, Australia, Ireland, Austria

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Source: GfK PoS Panelmarket

## Why are established countries declining?

### AI Speaker gaining weight within the market now accounting for over a fifth of the market



Total Radio excluding Car Audio									GB Panelmarket									Sales Units							
34.7	35.0	35.3	35.6	36.5	36.9	36.8	36.9	36.8	36.8	36.8	20.0				9.1	15.5	17.0	18.4	19.6	20.3	21.3	22.2	22.0	22.5	
								00.0	30.0	30.0	36.8	36.9	37.0	36.6	33.5	30.3	29.5	29.1	28.4	28.1	27.5	27.1	24.9	24.6	
11.7 1.3	11.8 1.3	12.1 1.3	13.5 1.4	14.1 1.4	<b>14.3</b>	14.8 1.4	<b>14.8</b> 1.4	14.9 1.5	<b>14.9</b> 1.5	<b>14.9</b> 1.5	<b>14.9</b> 1.5	<b>14.9</b> 1.5	<b>14.8</b> 1.5	<b>14.5</b> 1.5	12.4	10.6	10.0	9.4	9.1	9.0	8.8	8.6	7.9	7.8	
52.3	51.9	51.3	49.5	48.0	47.4	47.0	46.9	46.6	46.3	46.0	45.8	45.6	45.4	45.0	1.4 43.6	42.3	42.2	41.9	41.6	41.5	41.3	41.0	38.3	38.2	
MAT Aug 16	MAT Sep 16	MAT Oct 16	MAT Nov 16	MAT Dec 16	MAT Jan 17	MAT Feb 17	MAT Mar 17	MAT Apr 17	MAT May 17	MAT Jun 17	MAT Jul 17	MAT Aug 17	MAT Sep 17	MAT Oct 17	MAT Nov 17	MAT Dec 17	MAT Jan 18	MAT Feb 18	MAT Mar 18	MAT Apr 18	MAT May 18	MAT Jun 18	MAT Jul 18	MAT Aug 18	

Source: GFK PoS Panelmarket

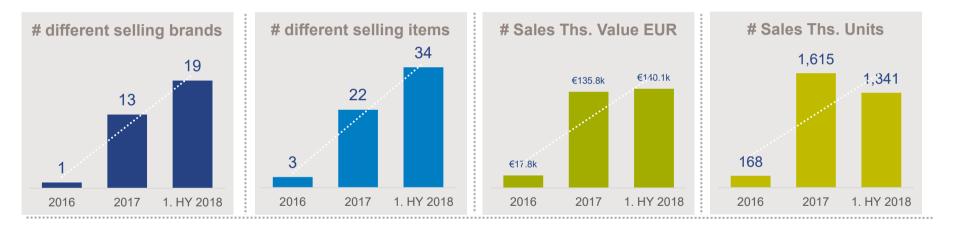
FM Radios

■ DAB and IP Radios ■ IP Radios ■ DAB Radios ■ AI Speaker

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## AI Speaker development in EU10: Total market size 1. HY 2018: 140,1 Mio. EUR









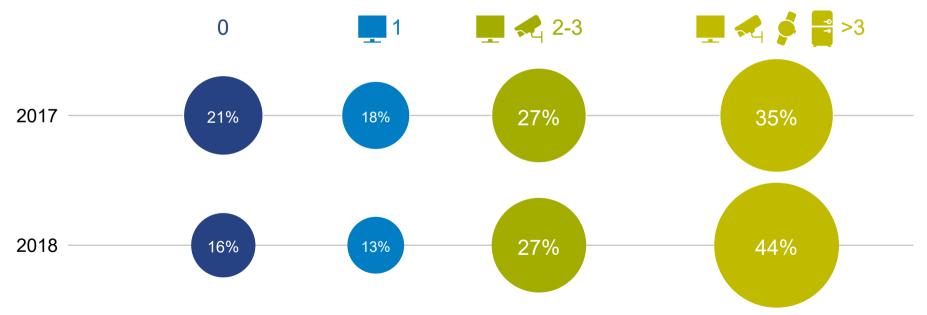
Music, news, and answering questions are the top three activities that consumers are performing with their AI speaker.

Base: D04i How frequently do you perform the following activities using your digital home assistant? | n= 1000 / 30% of these owning a DHA / Online survey | Online representive © GfK 9 November, 2018 | WorldDAB 2018 Presentation

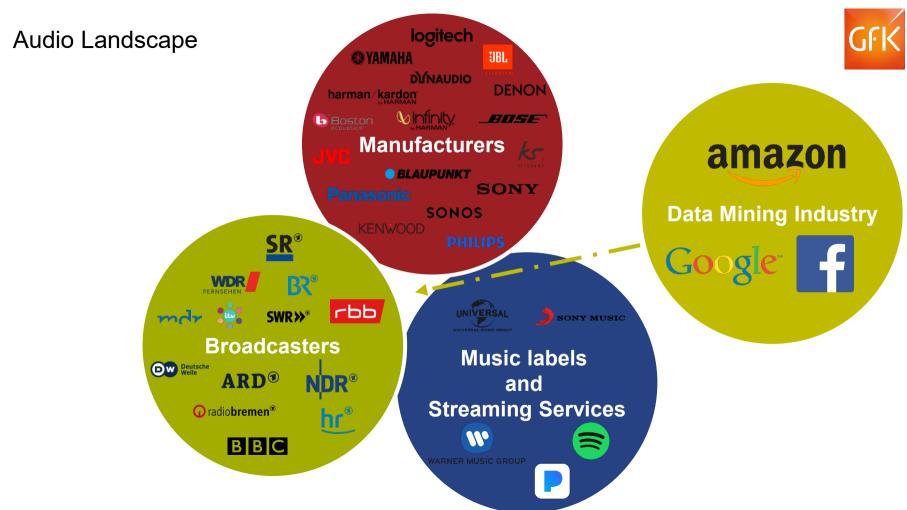
In line with rising sales, reported ownership of smart home devices is growing - particularly in the proportion who say they own 4 or more products



#### Smart home product ownership



D02. Do you currently use or are you interested in using any of the following smart home products or services within your household? Base: All respondents: 1000 in 2018, 1002 in 2017,



#### Summary

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The DAB market is challenged by saturation, but also by new technologies thriving into the market

SmartHome will thrive into the consumers lives quickly, they look for solutions that makes their live more easy

There is no need to be afraid - DAB can be part of that if "hybrid" solution are available

# Thank you!

Jan Lorbach Regional Senior Market Insights Manager Jan.Lorbach@gfk.com GfK UK Ltd