

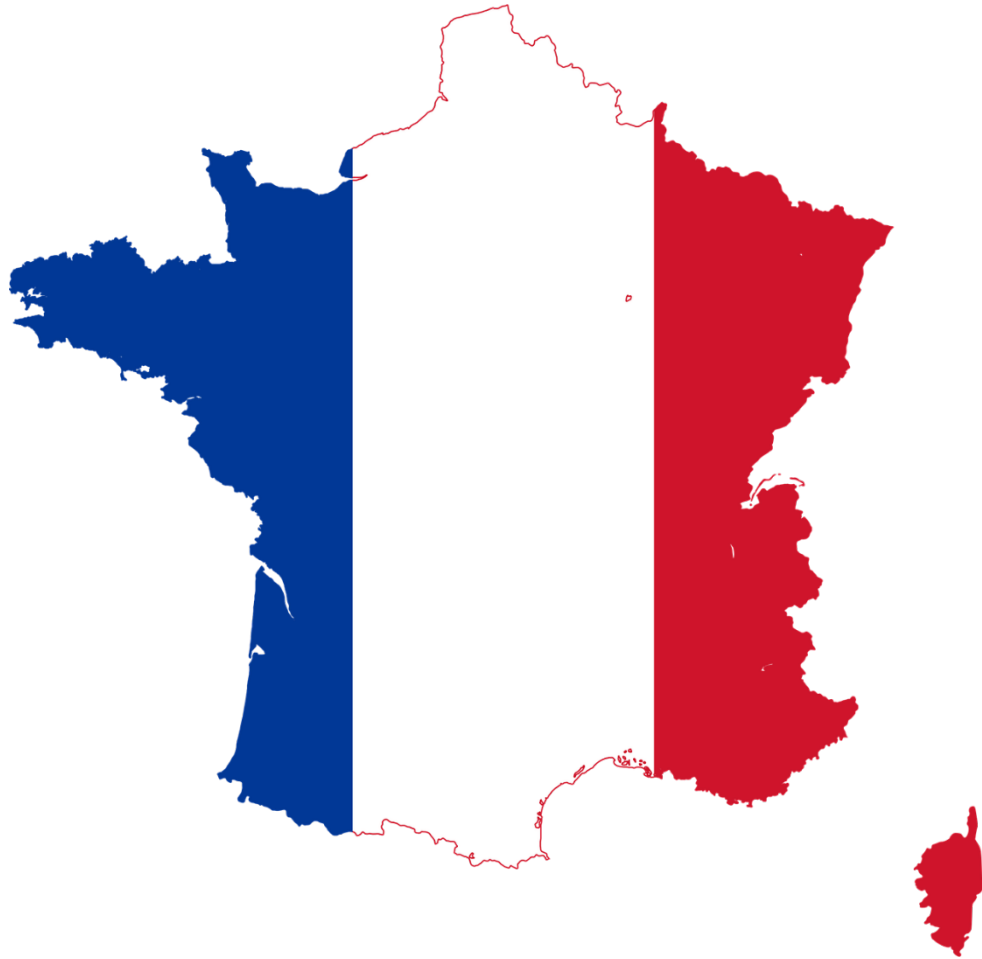
Development and growth

Patrick Hannon, President, WorldDAB

WorldDAB Summit, 2021

2021: a year of milestones

France: DAB+ goes national



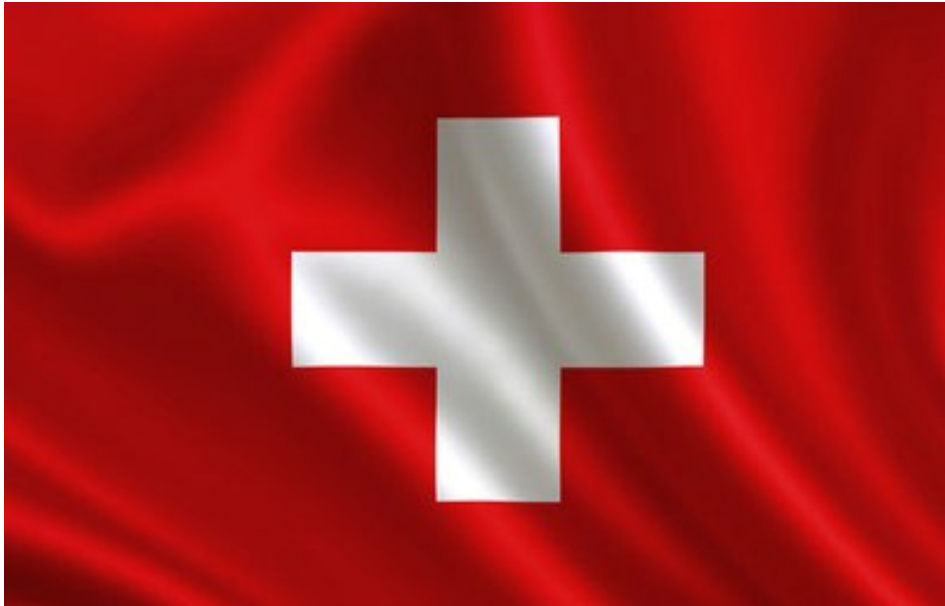
- 25 services on national DAB+
- Launch 12 October 2021

Germany: private mux for North Rhine-Westphalia



- 18 million population
- Launch 29 October 2021

Switzerland confirms FM switch-off



- FM services to be switched off by end 2024

Growth in Western Europe



UK:
66% of listening is digital



Italy:
Expansion of local muxes



Belgium:
Planned expansion of local services



Netherlands:
3rd national mux due in 2022

Progress in Central and Eastern Europe



Poland



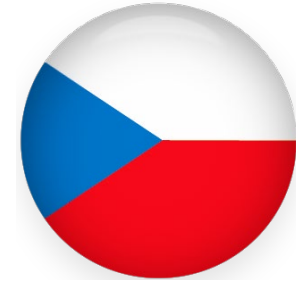
Austria



**Coverage extending to:
80% and 83%**



Croatia



Czech Republic



**National muxes move to
regular status**

EECC has come into force



- New car radios in EU must have digital terrestrial radio
- Now being transposed into national legislation

Our priorities for next three years

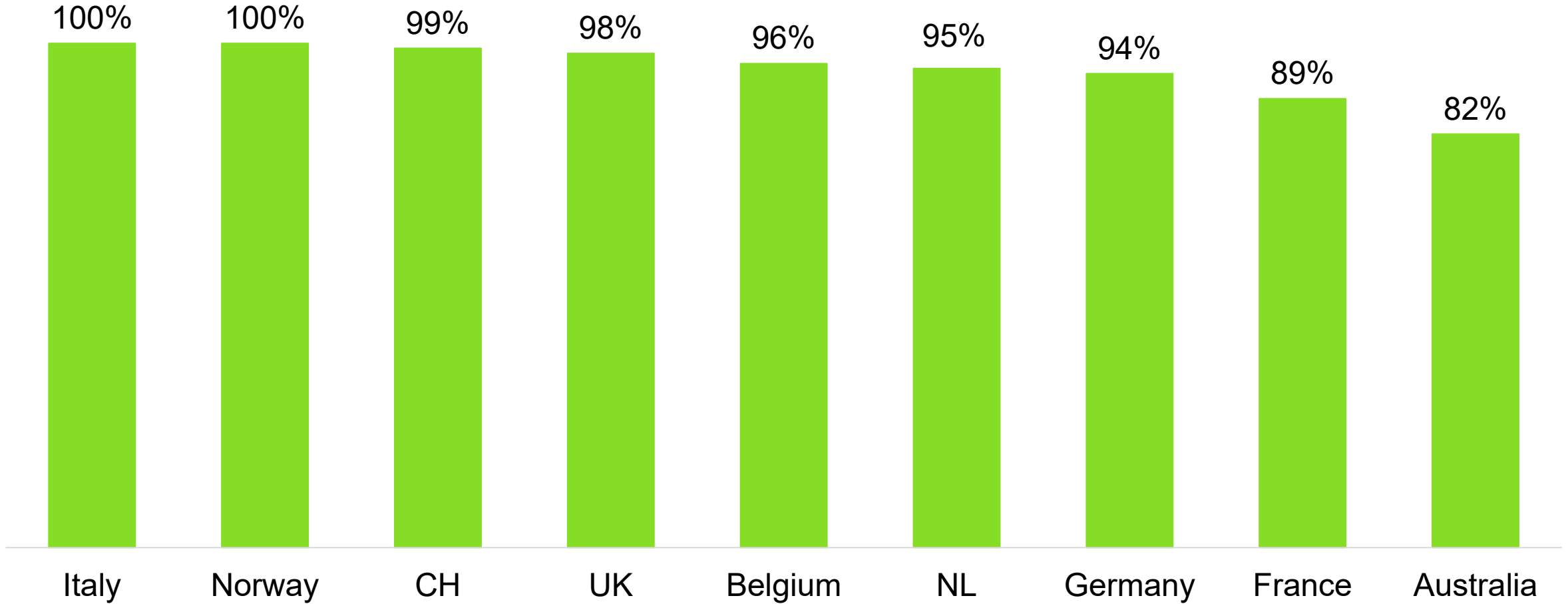
Three key priorities



DAB+ now standard in majority of new cars

New cars with DAB+ as standard

Goal: to build on this position



Maintain regulatory support for digital terrestrial radio



- Emphasise benefits for consumers & citizens
 - increased choice
 - free-to-air
 - reliable in emergencies

Ensure car makers understand consumer attitudes to radio

International research study

- Car buyer expectations re broadcast radio
- Broadcast radio's points of differentiation
- Expectations re development of radio in-car

- Share results with OEMs
 - Europe
 - North America
 - Asia Pacific

Work with car makers on innovation

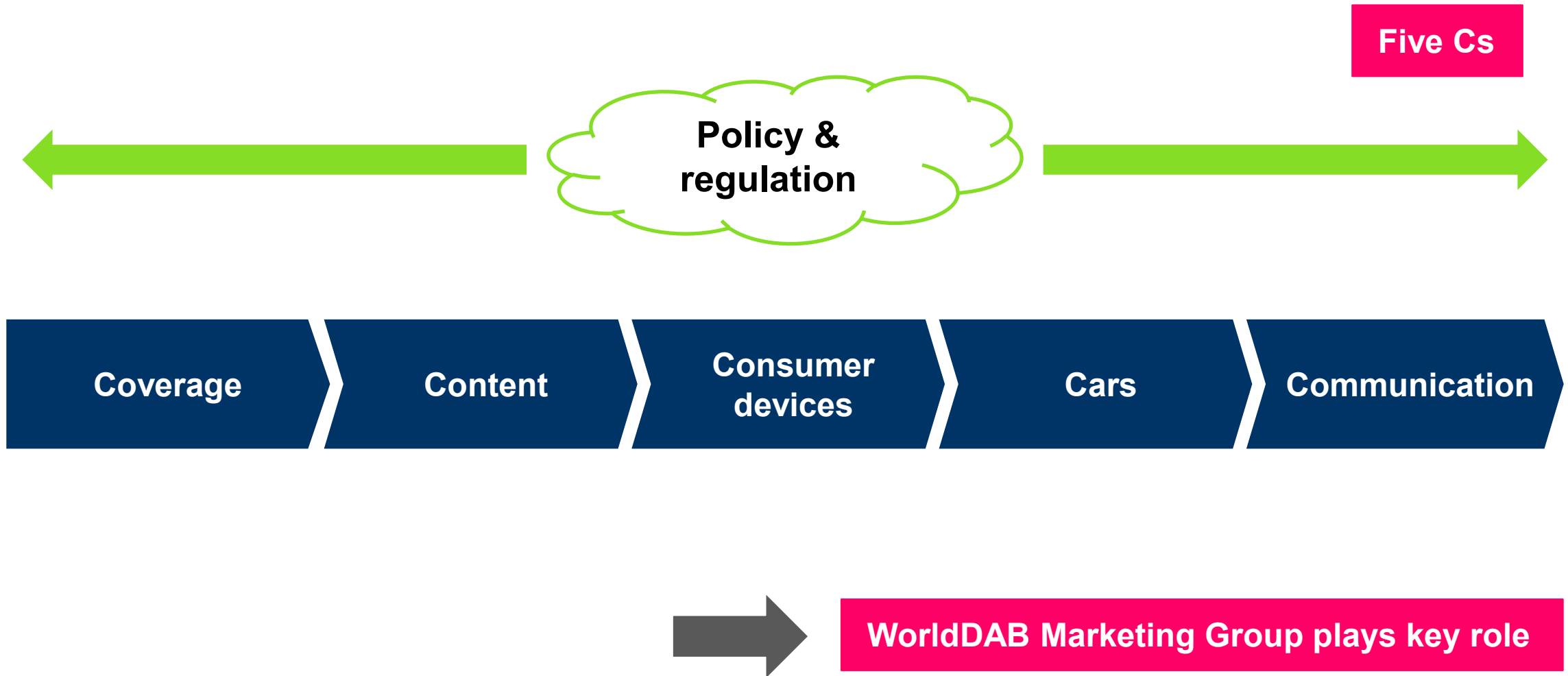


- Enhance DAB+ in the connected car
 - Metadata (e.g. station logos)
 - Voice control
 - Android Automotive
- WorldDAB Automotive Working Group

Three key priorities



Share best practice



Emphasize our green credentials



- DAB+ more energy efficient than FM and IP
- Reports
 - UK: 2020
 - Germany: 2021

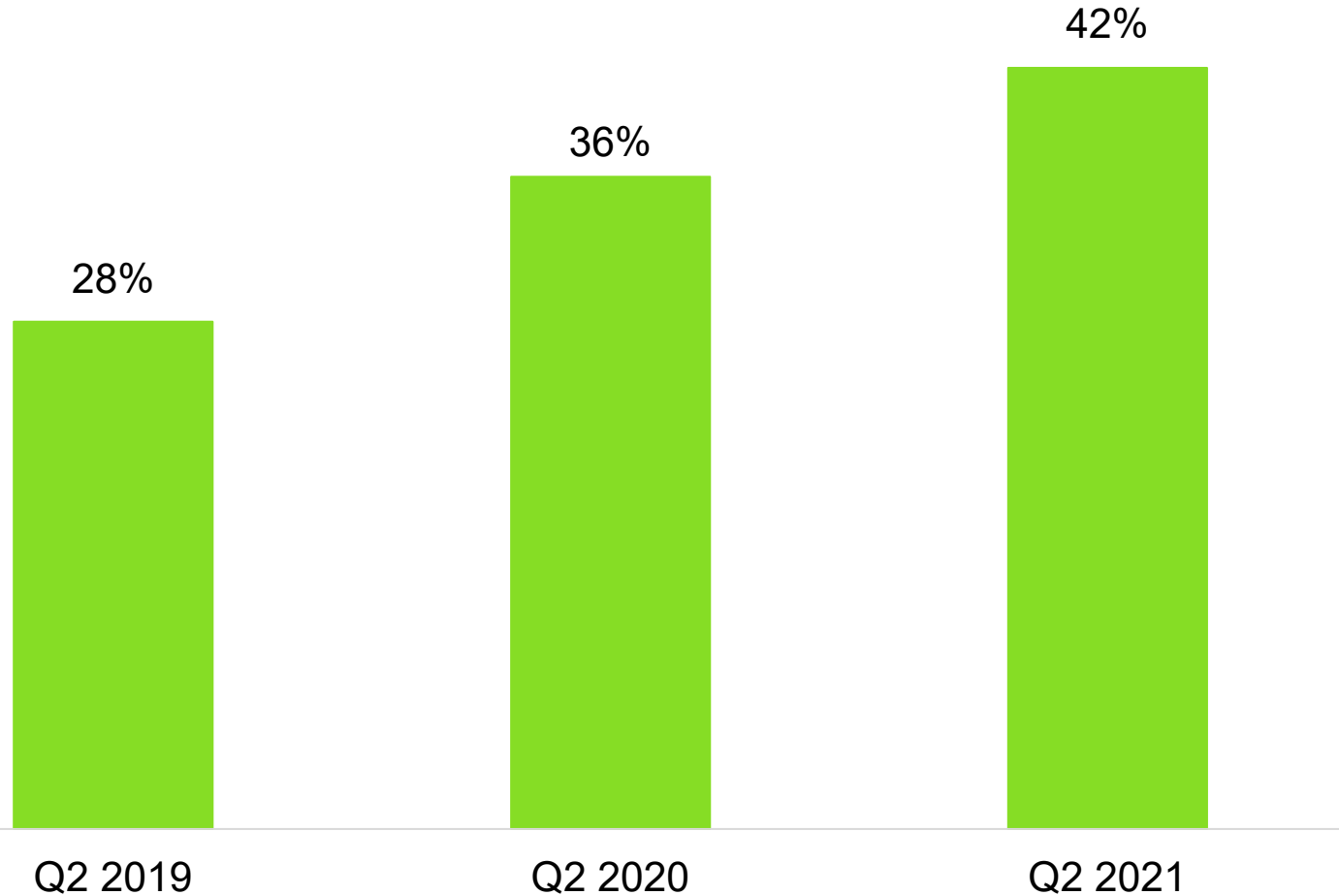
BBC

BR

BLM

Continue progress with consumer receivers

% of new consumer receivers with DAB / DAB+, EU12



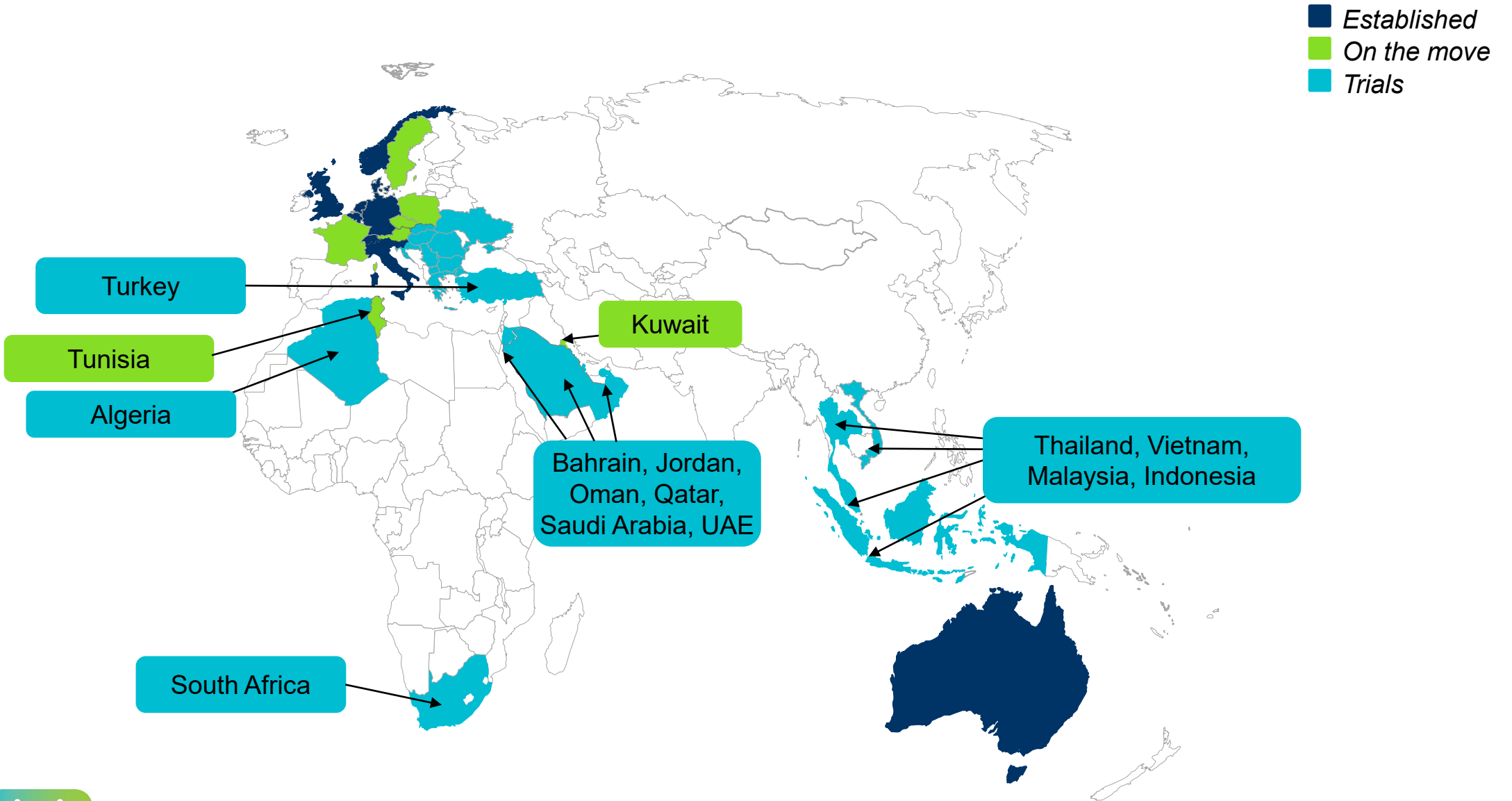
Keys to future success

- Engagement with retailers
- Sustained marketing campaigns
- Receiver regulation (Italy, Germany, France already in place)

Three key priorities



Outside of Europe, Australia in the lead – other markets preparing



Priority territories – work with partners

Europe / Eurasia

- Markets yet to launch, e.g.
 - Spain / Portugal
 - Greece
 - Romania / Bulgaria



Asia Pacific

- Potential first movers, e.g.
 - Thailand
 - Malaysia
 - Indonesia
 - Vietnam



Africa & Middle East

- Markets likely to be leaders in their regions, e.g.
 - Tunisia, Algeria
 - South Africa



Summary

- 1 Great progress in last 12 months
- 2 Consolidate position in cars and established markets
- 3 Next step: take DAB+ to new regions around the world

Thank you