



smart raudio

# Audio Market Disruption in Germany

## 10 years of DAB+ - a Decade of 'Radio Revolution'

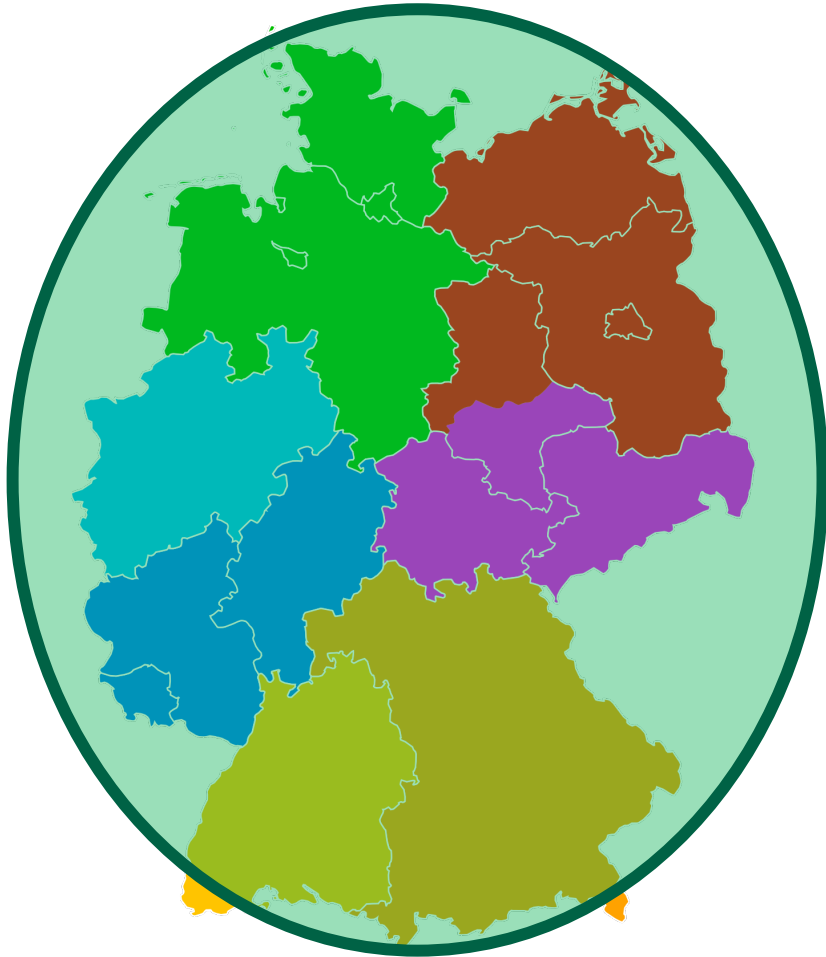
Erwin Linnenbach | CEO TEUTOCAST | 09.11.2021

Today DAB+ in Germany is not just a technical evolution...

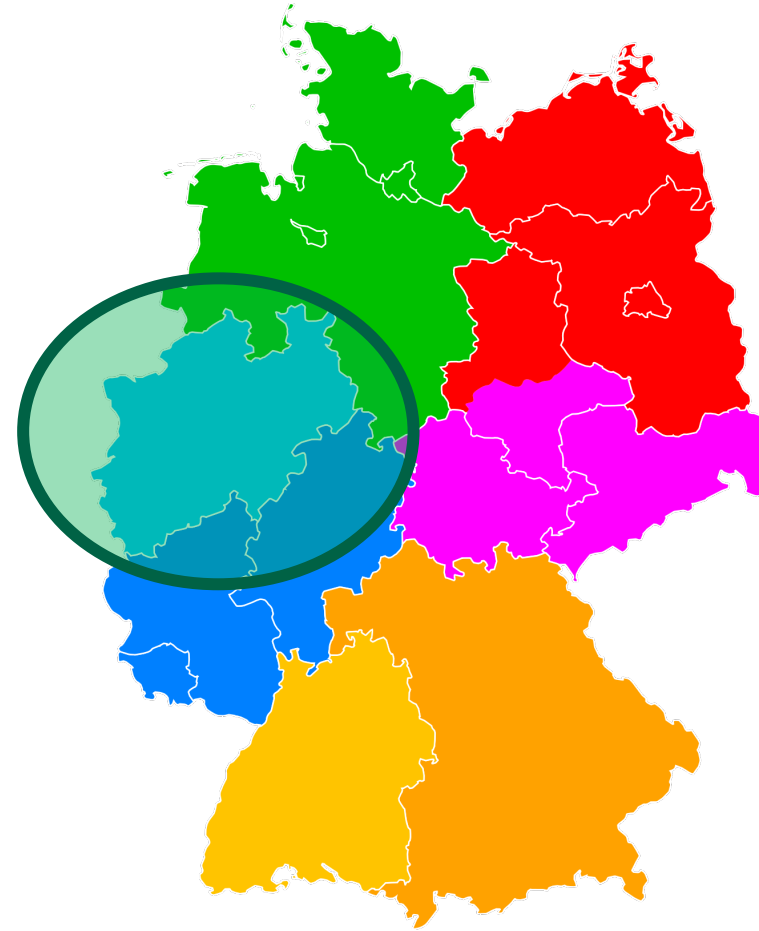
.it is also a true radio business revolution!

And it's happening twice!

# DAB+ enables nationwide and new statewide radio broadcasting



Nationwide DAB+  
82 million inhabitants



Statewide DAB+ in North Rhine- Westphalia  
18 million inhabitants (larger than 21 of the 27 EU countries)

# Nationwide DAB+ in Germany

## The first DAB+ platform

- public & commercial radio broadcasters
- On air since August 2011
- 13 channels

94 %

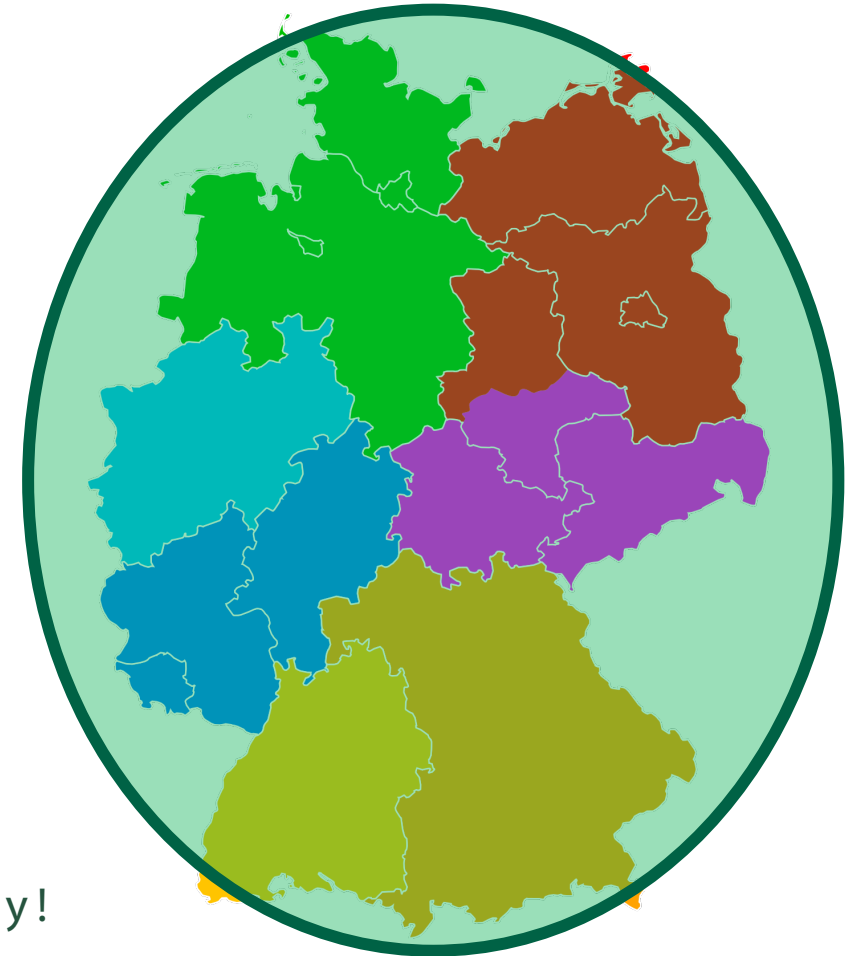
Technical reach (mobile outdoor)

## The second DAB+ platform

- Commercial radio broadcasters only
- On air since October 2020
- 15 channels

83 %

Technical reach (mobile outdoor)



→ Prior to 2011, nationwide radio did not exist in Germany!

(Exception: the public radio broadcaster Deutschlandfunk)

# Statewide DAB+ in North Rhine- Westphalia

The second DAB+ platform in NRW,  
but the first for commercial radio

- On air on 29. October 2021
- 16 channels

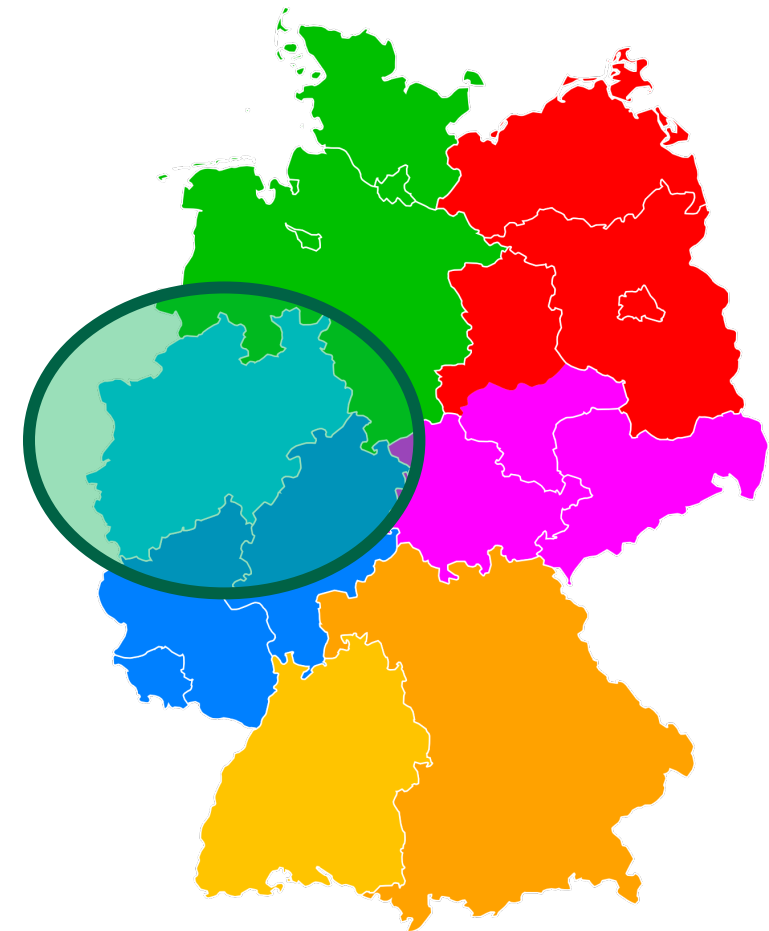
89 %

Technical reach (mobile outdoor)

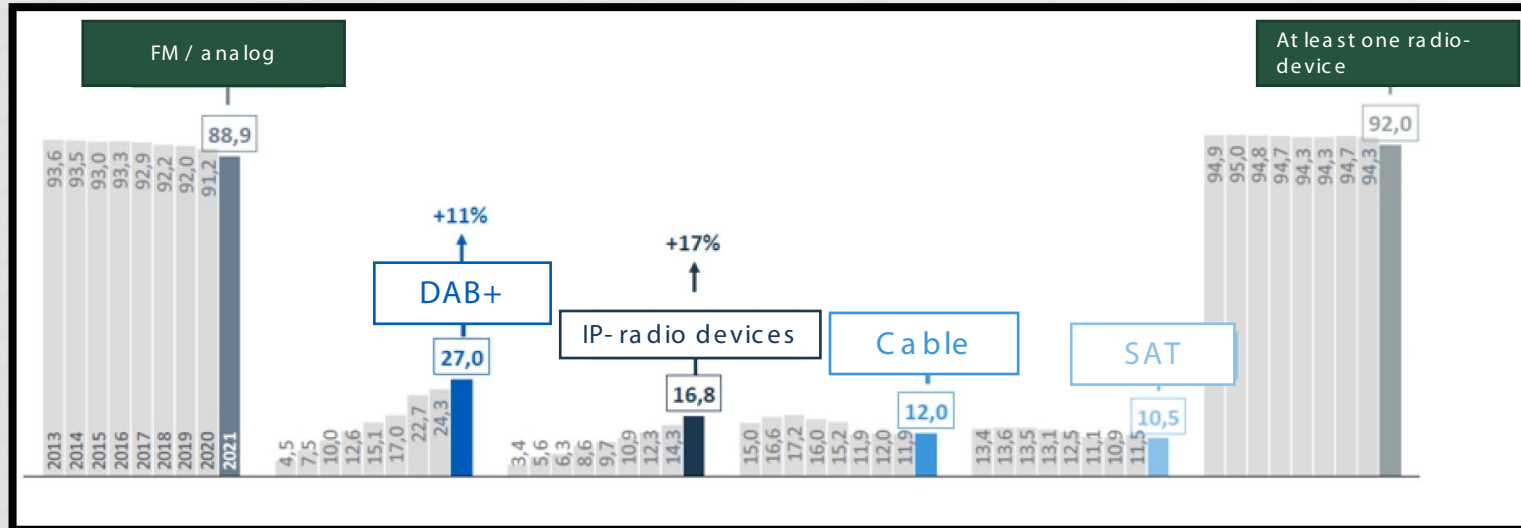
DAB+ itself is a disruptive change in  
the NRW radio market!

*The radio- desert will turn into a radio- paradise*

→ The radio landscape in NRW before: one public radio (WDR),  
40+ local radio stations (FM only)



# Constantly Growing Number of DAB+ Households



Numbers in percent:  
Basis: 39,676 / 39,866 / 40,072 / 39,372 / 39,672 / 40,219 / 40,350 / 40,684 / 40,768 Mio. households in Germany

Political  
tailwind:

Since end of 2020, a automobile manufacturers are required by EU law to outfit new vehicles with radios capable of receiving DAB+ broadcasts.

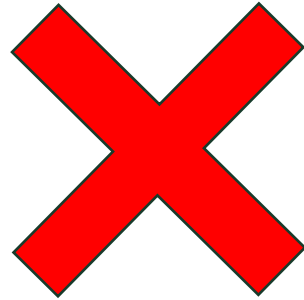


Important industry players are involved to build, manage and operate the new DAB+ platforms

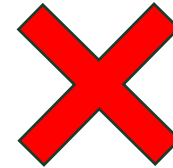
# The German radio market since 1986



No national brands



No real radio companies



No market-driven marketers

→ Focus on local and regional radio markets

# Why WE invest in radio NOW

## 1. Finally national brands!

- Establishment of national brands, programs and market-driven players
- Special interest programs are making commercially sense only on a nationwide basis



Germany's sports radio



Germany's radio for women



Germany's radio for drivers





# Why WE invest in radio NOW

## 2. Finally real national radio companies

- Complement of the local / regional oriented companies by new nationwide players, including market-driven marketers



smart radio



hear commerce

# Why WE invest in radio NOW

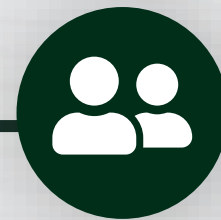
## 3. From radio brands to audio brands

- Blending linear digital radio (both terrestrial and online / mobile) with the new digital world of online, mobile, voice, social media, etc.

An exciting new opportunity for marketers and advertisers to get in touch with audio brand communities



hear commerce



Contacts

### Media



#### Special-Interest target groups

- Mobility
- Sports
- Women



1:1 contacts via online, mobile, voice, social media, etc.



We create listener's communities and transform them into fans, users and customers!



# The revolution in Germany's radio market...



..is sparked off!