



world dab

Radio thrives with DAB+ as
broadcast backbone

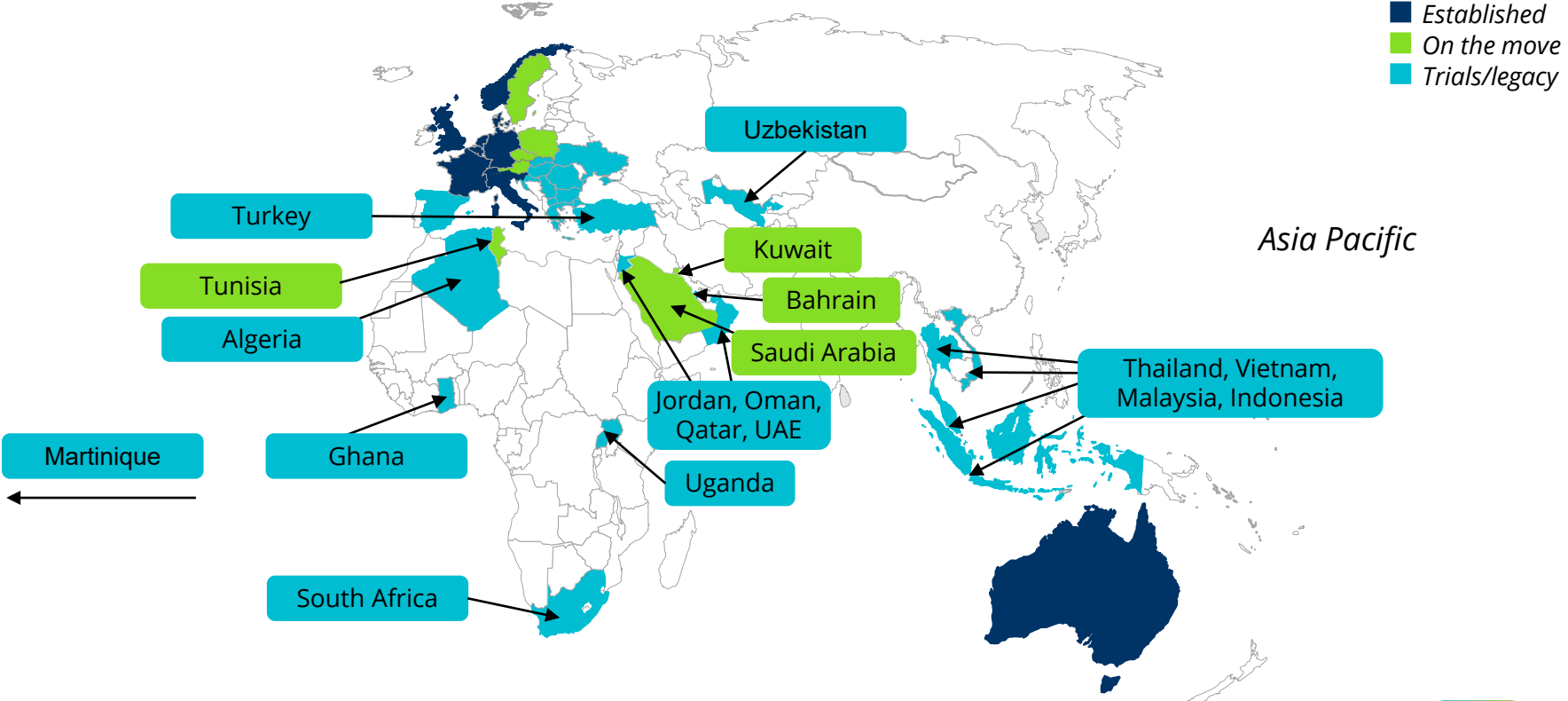
Munich, 08-11-23

Patrick Hannon: a decade of exponential growth



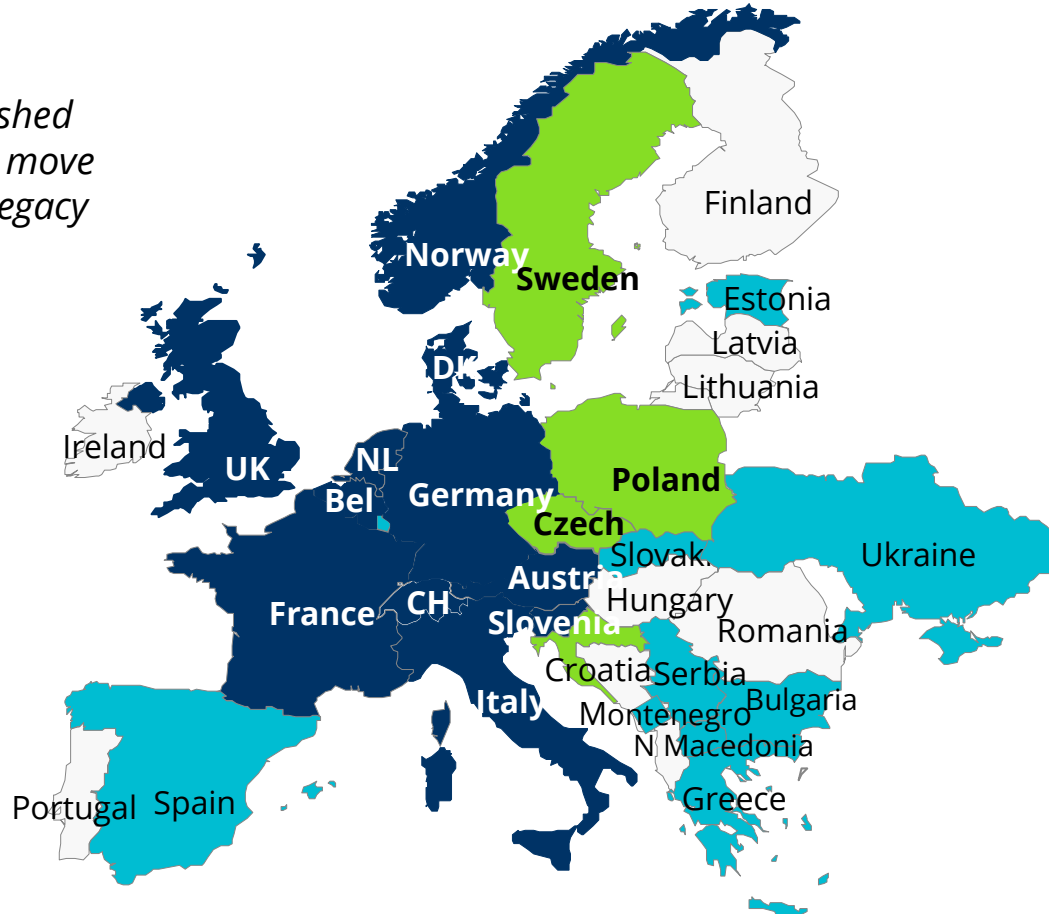
thank
you

Around the world exploration and implementation of DAB+ is taking place



DAB+ core digital radio platform in Europe

- *Established*
- *On the move*
- *Trials/legacy*



Major European markets are committed to DAB+



UK

- **70%** listening is **digital**¹



Germany

- **28,3 million** receivers sold²



Italy

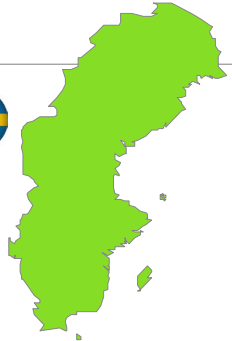
- **Law** requires **digital receivers**³ (automotive & consumer)



France

- **55%** DAB+ coverage ↑ **60%** end 2024↑
- **Marketing** starts H1 2024↑

Emerging markets are growing into established markets



Sweden

- **7 new national services** awarded for commercial radio in August 2023



Czechia

- **Auction** national commercial licenses **launched October 2023**



Poland

- **Coverage** now **69%**
- Tender awarded to built out to **88%**



Spain

- **RTVE:** “the future of sound broadcasting in Spain depends on implementation of DAB+”

Significant developments taking place around the globe

Africa

New trials:

- Ghana
- Uganda

Middle East

Regular services launched:

- Saudi Arabia
- Bahrain

Asia Pacific

Regulatory preparations:

- Thailand
- Indonesia

Radio plays a key role in lives of citizens

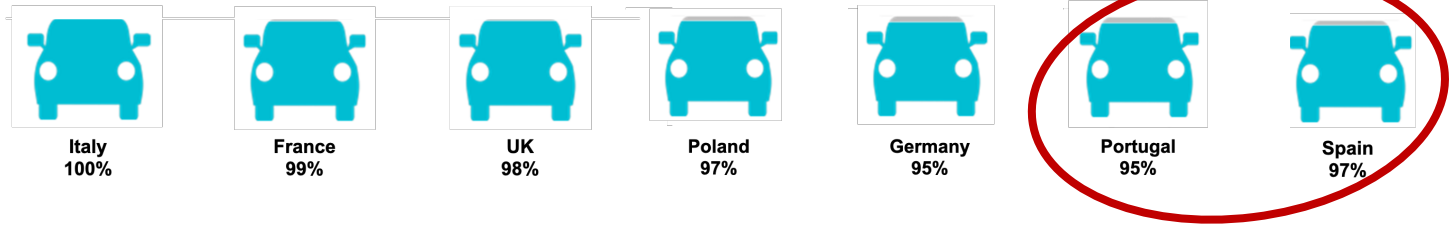
- 85% of Europeans listen to radio each week
- 90% of every car buyer say radio should be standard in every vehicle
- Radio: the medium most trusted by European citizens – for 13 years in succession



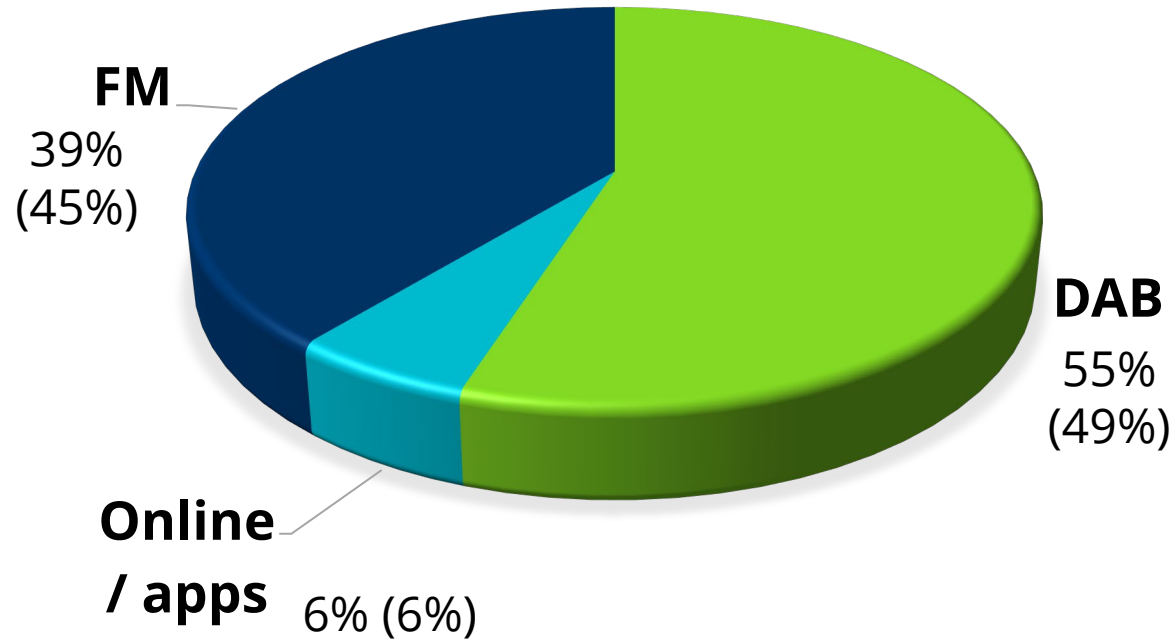
DAB+ is a standard feature in European cars

Europe: 1H 2023

96% of new cars with DAB+

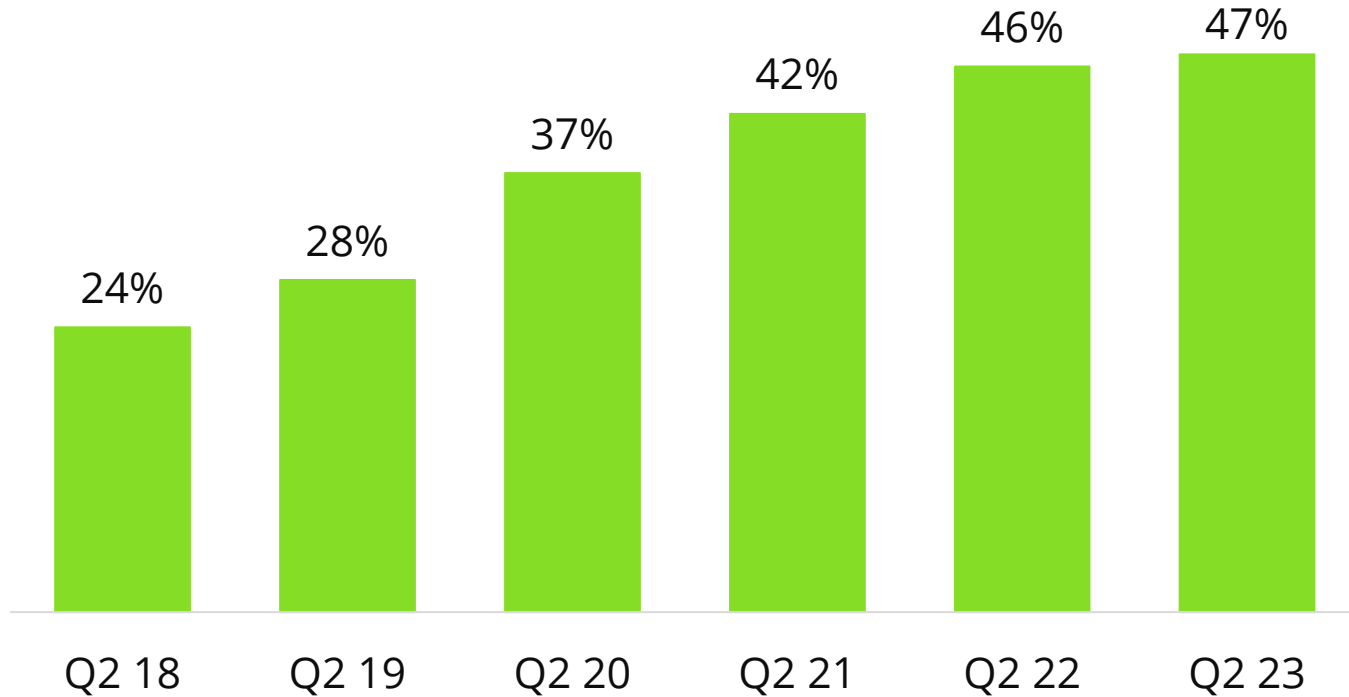


DAB+ rapidly emerging as the key platform for in-car radio listening



Source: RAJAR Q3 2023, figures in brackets for Q3 2022

% of consumer radios with DAB+ almost doubled in last five years



Strategic priorities are clear

Top three objectives

1. Established markets

- Marketing best practice
- Boost sales of consumer receivers

2. Cars

- Ensure all new car radios in EU have DAB+
- Innovate with partners in connected cars

3. New territories

- Europe
- Africa & Middle East
- Asia Pacific

WorldDAB strategy
updated in Q1 2023

My personal contribution as president

1. **Passionate representation and advocacy**

2. **Focus on communication**



3. **Fostering a culture of learning**

And on a personal note...

Collaboration is the key to success



Thank you