Delivering Digital In-Car Ford Ennals Digital Radio UK













UK and Germany: A Shared Vision





FINANCIAL TIMES

Media, Broadcasting

Digital technology drives new 'golden age of radio'

The Telegraph

Digital radio set to kill off FM

By Henry Bodkin

ger the beginning of the end of FM radio as early as this year.

to more than a billion hours each week FM signal being switched off. according to industry monitor Rajar.

The renaissance has been fuelled by the signal in January. an increase in people accessing radio digitally, through devices such as tab- Continued on Page 4

lets and smartphones, with the balance shifting so quickly that analysts predict A SURGE in digital listeners could trig- digital listeners will become the majority within a year.

The Government has said that once Radio use in the UK is now at record that milestone is reached it will underlevels, with 48 million adults listening take a review that could result in the

in the final three months of last year, Norway became the first country in the world to end FM radio when it cut

"Even five years ago this situation

Golden age for UK radio

MailOnline

The end of FM radio: 'New golden age' of digital broadcasting could see the traditional signal scrapped this year



Audio

Digital radio listening in the UK hits record high

Could the latest surge in internet and DAB radio listeners spell the end of FM?



New competition







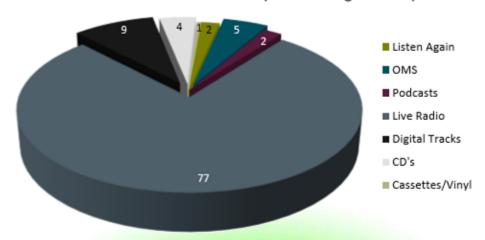






Radio dominates share of audio

SHARE OF AUDIO % (excluding visual)





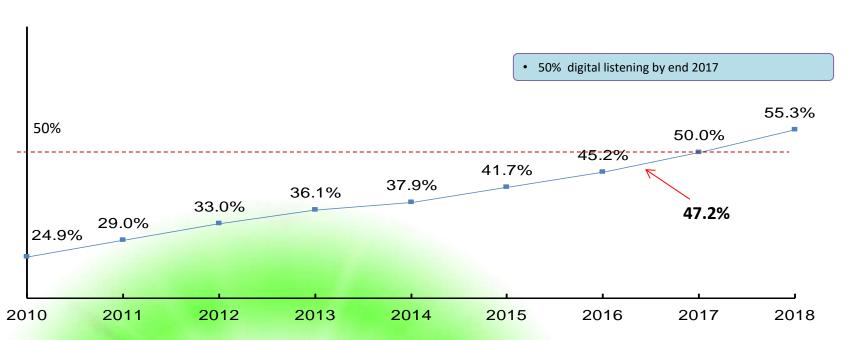
New ways of listening





Digital listening heading for 50%

Digital share of listening, %







72% of digital listening is DAB



Content, coverage

and cars















Content expansion of national stations



























Magic

































Biggest car markets in Europe

Cars on the road
Cars sold annually



33.5M 45M

2.6M 3.2M



LIVE RADIO by ACTIVITY **REACH%** Driving/ travelling 57.7 Relaxing/ nothing particular 35.9 **Household Chores** 34.5 Eating/drinking/cooking 32.2 Working/studying 21.8 Other 12.3 Using the Internet Socialising 6.1 Communicating 5.0 Sports/ exercise/ hobbies 4.9 Online purchasing 4.6 Shopping 1.0 Gaming 1.1 20 10

Importance of in-car listening



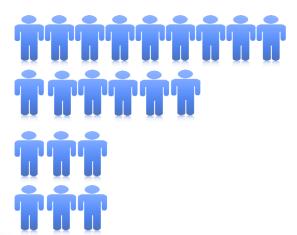
Radio in cars

93% of drivers

63% of Listeners

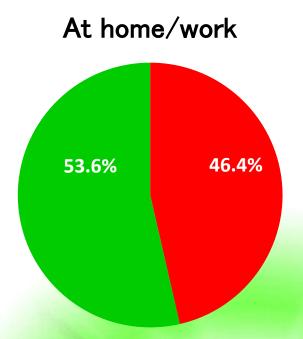
35% of Revenue

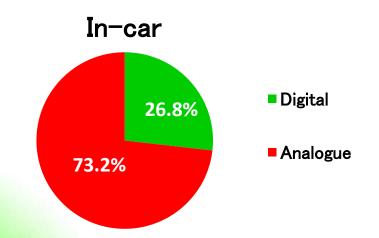
23% of listening





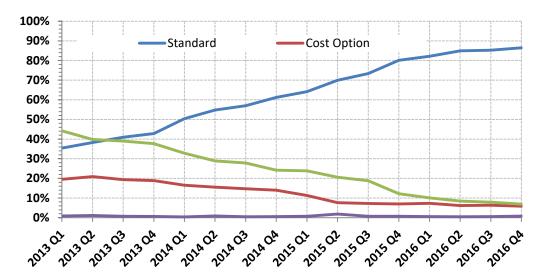
Digital listening in car: Half the level in home







DAB in new cars Nearly 90%















10 million cars in the UK have digital radio

- 30% of all UK cars have digital radio
- 70% of all UK cars without digital radio
- Importance of car conversion





Converting cars to digital









Clear Government criteria



Coverage

- DAB national coverage equivalent to FM
- DAB local coverage above 90%



Listening

50% of radio listening to digital



Progress on cars



UK Government position





Digital Economy Act 2010







Importance of European success



TechniSat



Creating a

European market





Panasonic

PURE





What we need across Europe

1. DAB in all new cars

2. DAB in all radios



Delivering digital in-car Thank You

