

7 NOVEMBER 2017

DIGITAL RADIO NL

**FASTEST DAB+ LAUNCH
TO DATE**

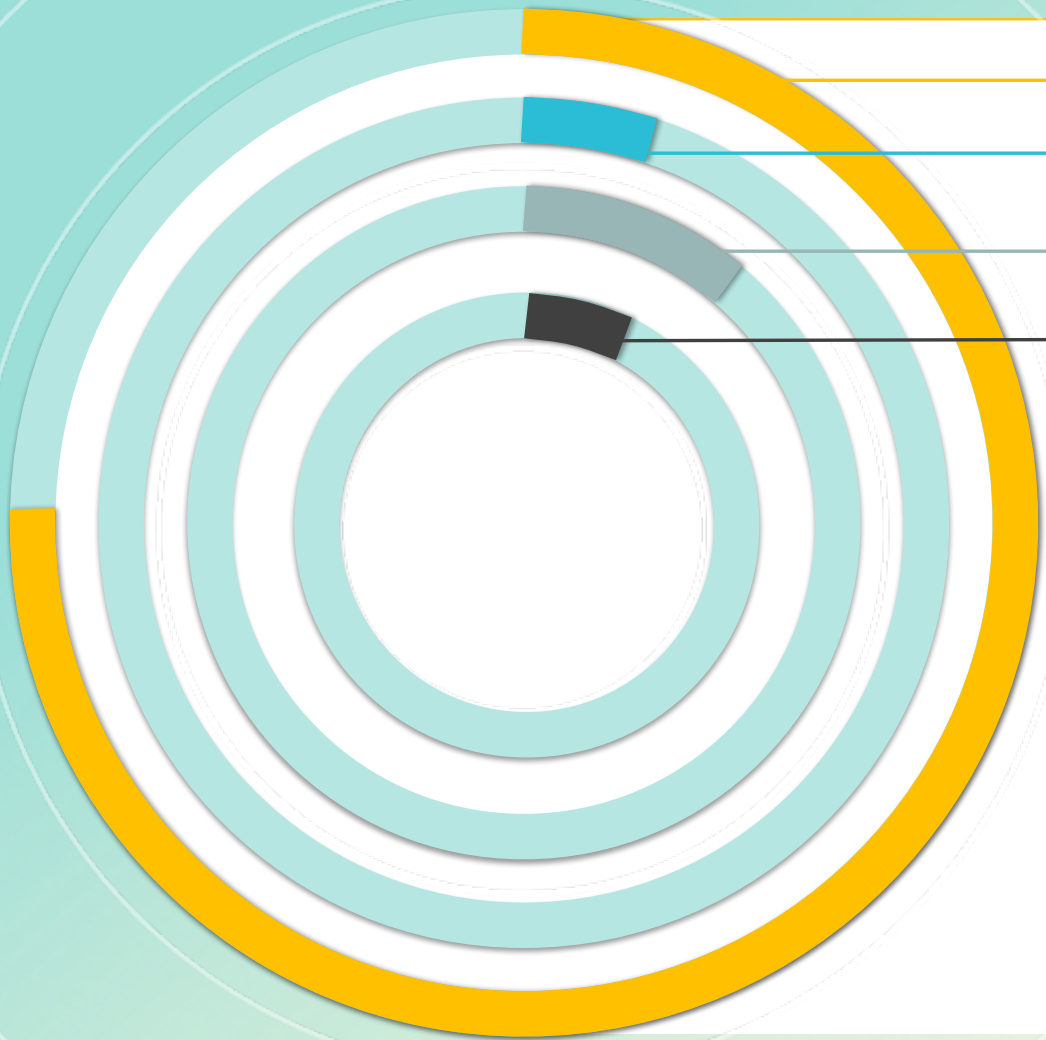
**JACQUELINE BIERHORST
PROJECT DIRECTOR DIGITAL RADIO NL**



RADIO LISTENING



SOURCE: GFK | radio research 1st ½ year 2017



LIVE RADIO 76%

OWN MUSIC 5%

MUSIC SERVICE 12%

YOUTUBE 4%

RADIO IS HOT

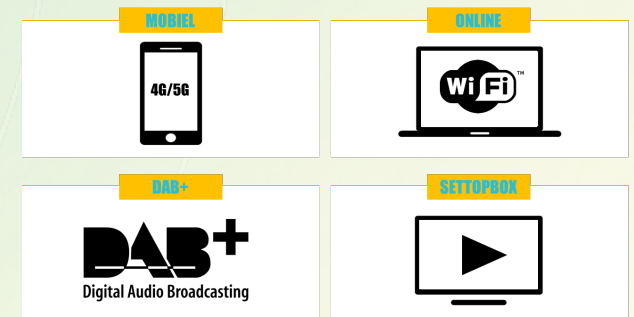
SOURCE: GFK 2017 | NLO AUDIO DISTRIBUTION RESEARCH (ADO) LISTENING TIME SHARE AUDIO SOURCES

RADIO LISTENING MORE AND MORE DIGITAL



52% ON AIR FM

48% OTHER THAN FM



(CONNECTED DAB+ & IP)

DIGITAL HYBRID IS NOW & FUTURE OF RADIO

SOURCE: GFK 2017 | NLO AUDIO DISTRIBUTION RESEARCH (ADO) LISTENING SHARE PER DISTRIBUTION SORT

DAB+ ADVANTAGES

BENEFITS OF DAB+ STAKEHOLDERS, A.O.

LISTENERS

- **CLEARER SOUND**
- **GREATER CHOICE**
- **EASY NAVIGATION**
- **NEW DATA SERVICES**

BROADCASTERS

- **INNOVATION**
- **BRAND EXTENSIONS**
- **COST EFFICIENCIES**

SOCIETY

- **GREENER DISTRIBUTION**
- **FREE TO AIR / UNIVERSAL**
- **NO GATEKEEPER / PROVIDER**
- **ROBUST IN CASE OF EMERGENCY**

**ALL RADIO STATIONS IN THE NETHERLANDS
PUSH DAB+ AS
BROADCASTING BACKBONE**



NETHERLANDS

**NL IS PART OF THE
DIGITAL RADIO WAVE
THROUGH EUROPE**



COLLABORATION KEY TO SUCCESS



NATIONAL & INTERNATIONAL

DIGITAL RADIO NL



nederlandse
publieke
omroep



VERENIGING
VAN
COMMERCIEËLE
RADIO



Ministerie van Economische Zaken

 Regionale Publieke Omroep

NLCR:



Rijwiel en Automobiel Industrie

UNETO-VNI



FIAR CE
consumer electronics

>75 RADIO STATIONS ON DAB+

CONTENT

MOBIELE TV NI

SEMI-NATIONAL:

LOCAL & REGIONAL COMMERCIAL:

REGIONAL GAP-FILLERS:

DAB+ NETWORKS

COVERAGE

NPO

- 4 on FM -> 14 on DAB+
- Population mobile: 99%
- Population indoor: 87%



VCR

- 9 on FM -> 18 on DAB+
 - Coverage: > 95%
- Network upgrade ready in december 2017

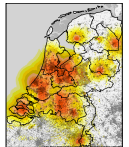
ROOS & NLCR + OTHER REGIONAL STATIONS

- 6B; 7A; 9D-N; 9D-Z: geographic mobile 100%
- 8A: geographic mobile 69%



MTV NL

- Population mobile: 80% -> 95% in 2017



LOCAL BROADCASTERS

- Tests

NEW DAB+ MUX(ES) TO BE EXPECTED 2018

FACTS & FIGURES

CONSUMER DEVICES

>719.000

SOLD DAB+ DIGITAL RADIO'S
(including DAB+ line fit in new cars)

SOURCE: GfK Panel Market Sales Units | July 2017

60%

NAME AWARENESS DAB+ / DIGITAL RADIO
(doubled compared to September 2014)

SOURCE: NPO MAP June 2017

35%

1st ½ 2017
DAB+ LINE FIT IN NEW CARS
2016: 26%; 2015: 16%; 2014: 6%

SOURCE: JATO DYNAMICS/WorldDAB 2017

41%

1st ½ 2017
DAB+ AS OPTION IN NEW CARS
2016: 44% 2015: 46%

SOURCE: NPO MAP June 2017

29%

OF THE DUTCH POPULATION INTENDS TO BUY A RADIO WITH DAB+

SOURCE: NPO MAP June 2017

NEDERLAND 'BEST IN CLASS' EUROPE

(COMPARRISON 1st 3 ½ YEARS AFTER THE LAUNCH OF DAB+ DIGITAL RADIO)

UNETO-VNI

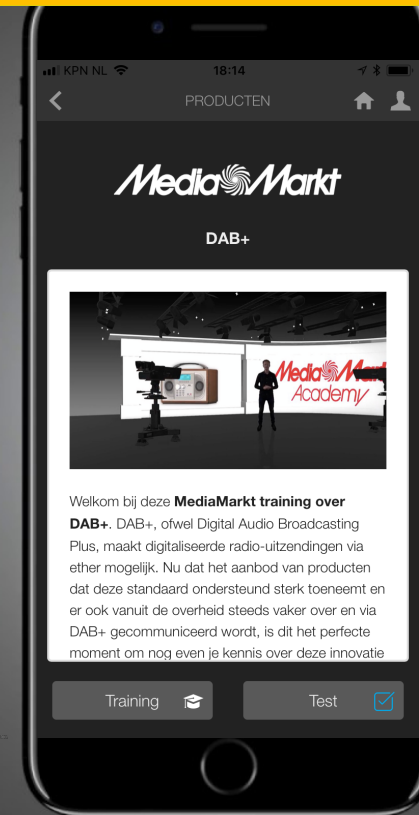
INDUSTRY ORGANIZATION RETAIL

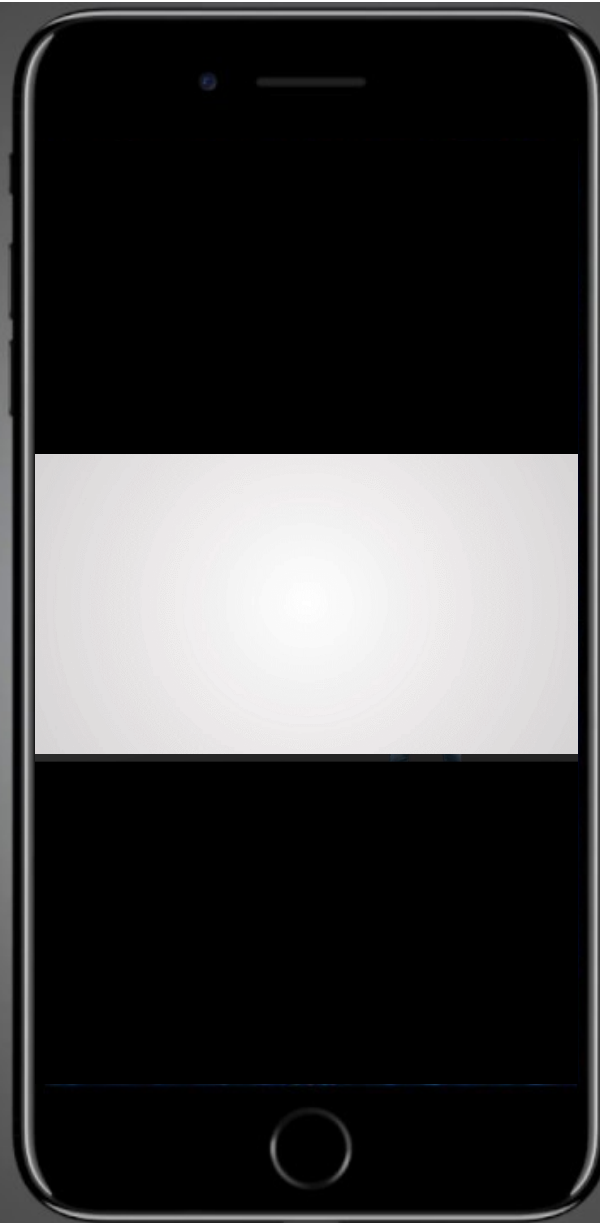


= 90% OF ALL RETAILERS

STORES 1.110

MOBILE APP LEARNING – OFED EXAM





Dear colleagues,

Welcome to this new training of DAB+

DAB+ means Digital Audio Broadcasting

DAB+ is the improved version of DAB

And is the digital radio variant of digital television

DAB+ is becoming increasingly interesting to the consumer

And the range of DAB + car radios, radio's and stereo sets increases significantly

At the same time, communication and information - by amongst others the government and digital radio - about and via DAB+ is growing

Therefore... it is now time to freshen up your knowledge on DAB+

So that you can inform your customers well

In this training we explain what the advantages of DAB+ are

....

UNETO-VNI

INDUSTRY ORGANIZATION RETAIL



= 90% OF ALL RETAILERS

STORES 1.110

MOBILE APP LEARNING – OFED EXAM



OFED
UNETO-VNI

DAB+ = SUCCESSOR OF FM

100% COMMITMENT:

GOVERNMENT

BROADCASTERS

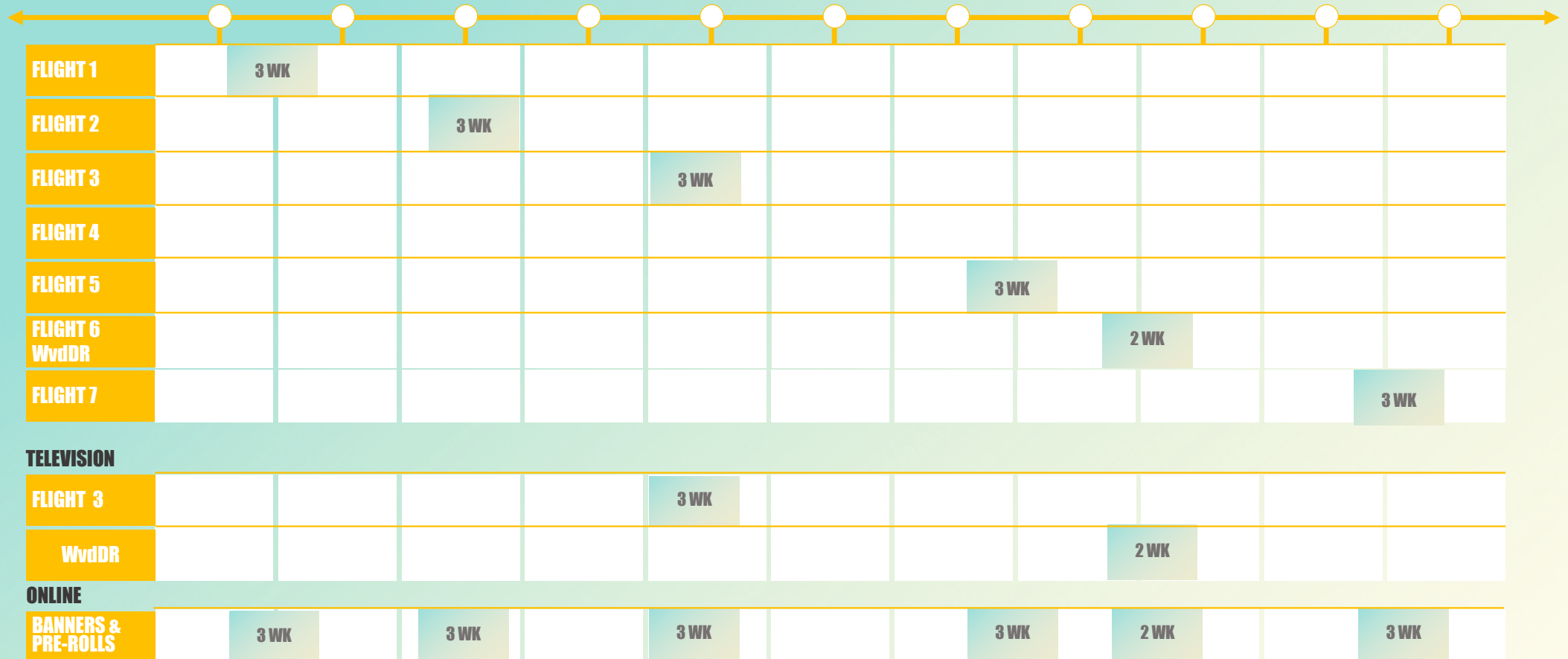
YEARLY PLAN OF APPROACH

(looking forward to 2023)

CAMPAIGN '17 : > € 3.3 MIO

COMMUNICATION CONSUMER

FEBRUARI MARCH APRIL MAY JUNE JULY AUGUST SEPTEMBER OCTOBER NOVEMBER DECEMBER





DAB+ JUMPS & REACHES MASS MARKET

USE **DAB+** **TRIPLIED**
Digital Audio Broadcasting

13%

>2 mio people

2023

**DIGITAL
RADIO**

> 70%

**OUR AMBITION:
ANY RADIO SOLD,
CAN RECEIVE DIGITAL**

NOVEMBER 2017

DAB+

- **More channels**
- **Digital sound quality**
- **Easy to use**

FREE TO AIR

- **No gatekeeper**
- **No subscription/login**

& MORE

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