



AUDIO IN TRANSITION

GfK POS - Point-of-Sale Tracking

Digital radio sales and the impact of new trends including
multiroom and voice activation

World DAB General Assembly 2017, Paris

GfK Retail and Technology
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1

GfK

How are the data of the sales at the POS measured?

2

Audio in transition

What are the impacts of Multiroom & Voice Activation ?

3

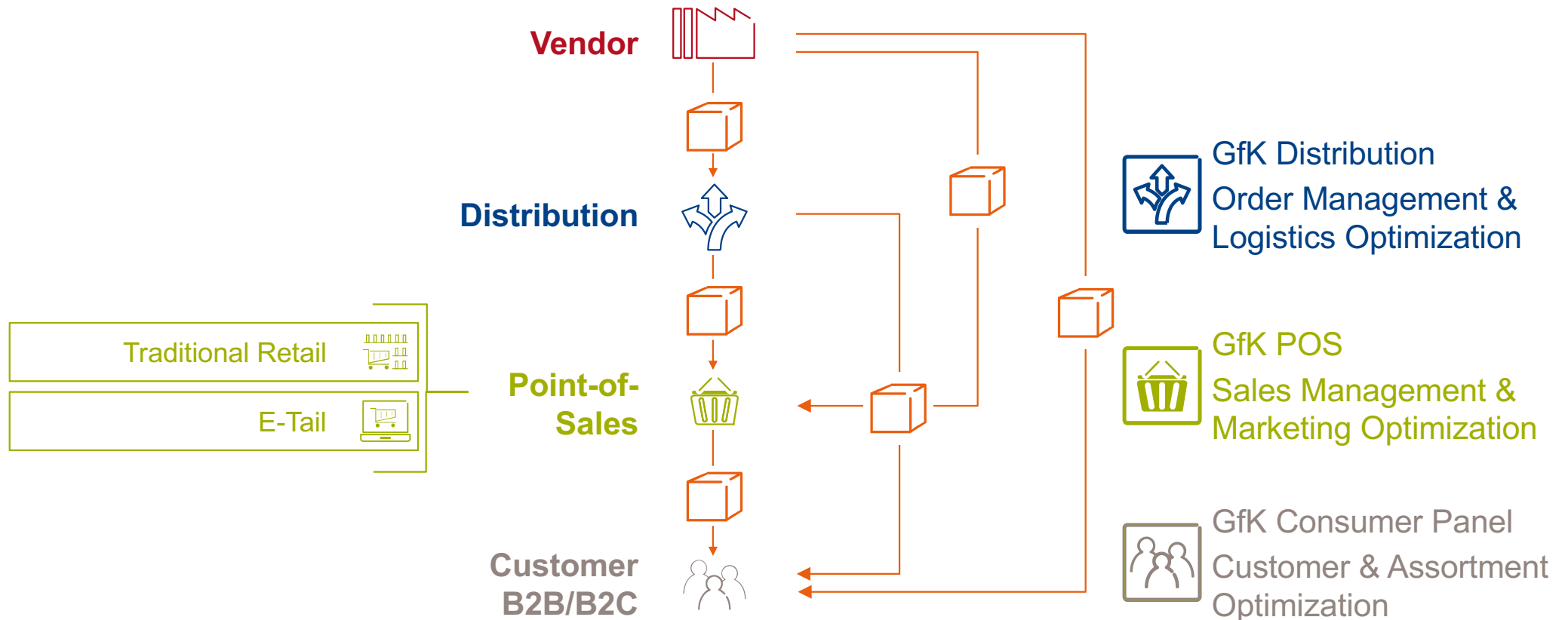
How is Digital Radio developing?

How are the global markets ?

1. GfK POS Point of Sales Tracking Methodology



What sold where at which price and when?
You can find answers in the GfK POS Panel.

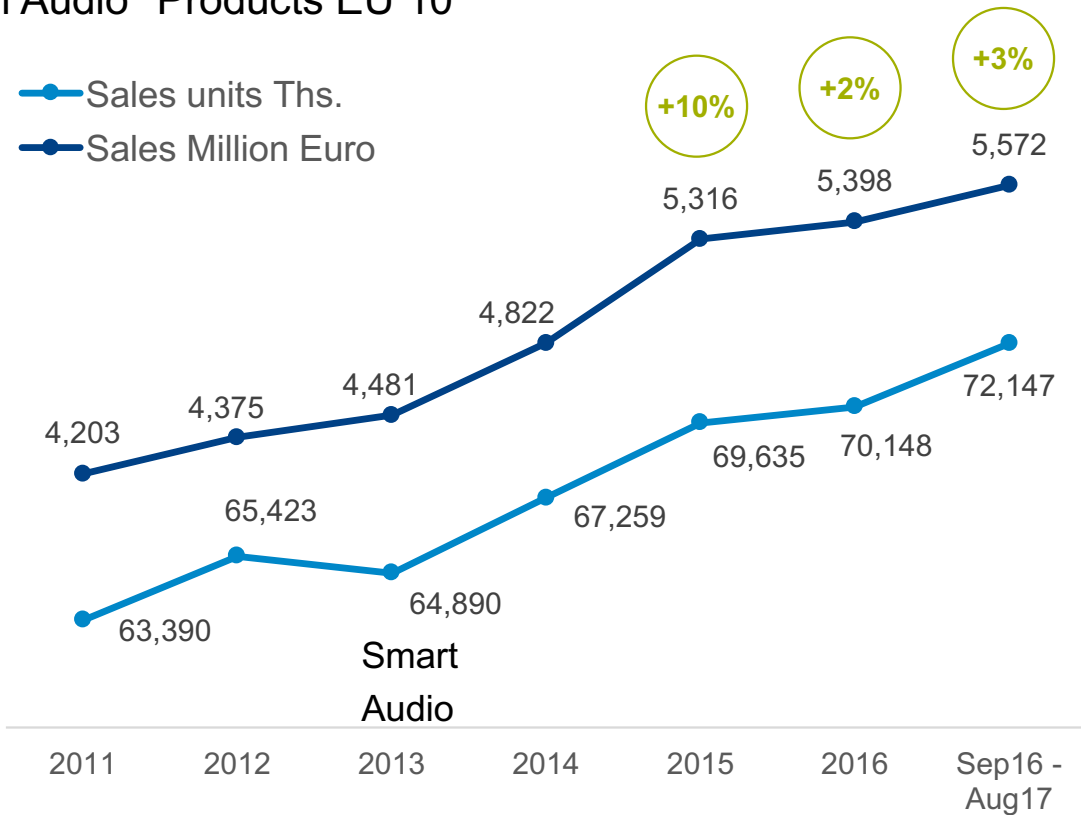


2. Audio in Transition

The development of audio products is sustainable growing and still positive.



All Audio* Products EU 10**



35%

of all audio products provide Bluetooth as connectivity standard

(Units share Sep 2016 – Aug 2017)

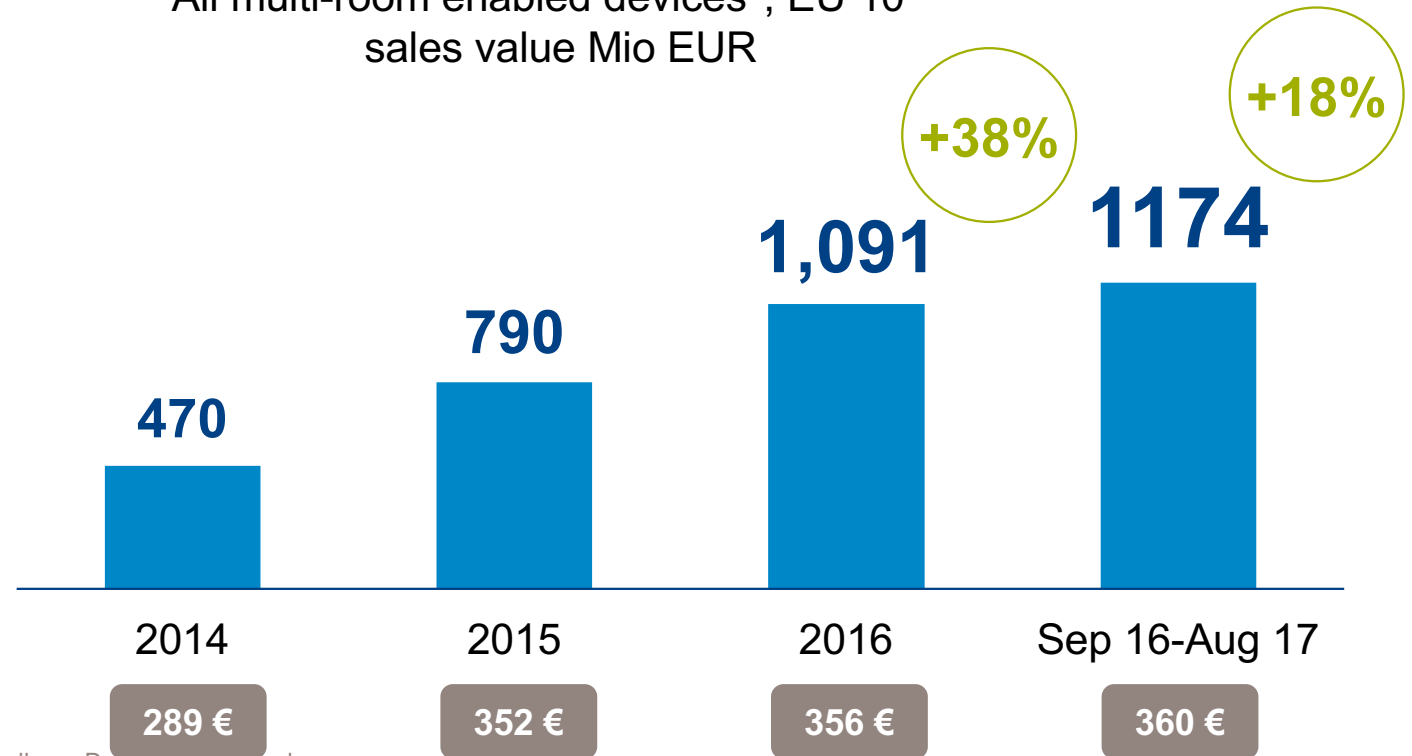


- *including: AHS, AMPLIFIER, DMS, HPH+Mob.HS.St, LOUDSPEAKER, RECEIVER, TUNER, CD TABLE
- ** DE, FR, GB, IT, ES, NL, AT, BE, CH, SW,

Multiroom functionality is further growing in the Audio Market.
Consumer are paying more.



All multi-room enabled devices*, EU 10 **
sales value Mio EUR



Average Price / Unit:

*Product Groups: Audio Home Systems, Receiver, Soundbars, Docking Mini Speaker

** EU 10 Countries: AT BE CH DE FR GB NL IT ES SW

For what are you using the Echo/Home ?
2/3 indeed use it for playing music.



Echo/Home users are using these devices:



All the time.



Regularly/all the time.

2/3 of the people who are using Echo/Home are using it for listening to music.

Top 10 ways people are using Echo/Home



This will grow!
✓ 75% of consumers find the smart home fairly or extremely appealing.¹

Source: GfK Commanding Media 2017, (US)

3. DAB Development in Europe and Australia

GfK POS Tracking Methodology

Digital Radio Market



GfK Panel Market vs. GfK Total Market
Coverage Estimation: in most countries more than 80%

DAB Radio – More Brands are offering more Models.



Period: Sep16-Aug17

DAB Radio
Number of different
Selling items
EU 12 + AU Panel

2.111

DAB Radio
Number of different
Selling Brands
EU 12 + AU Panel

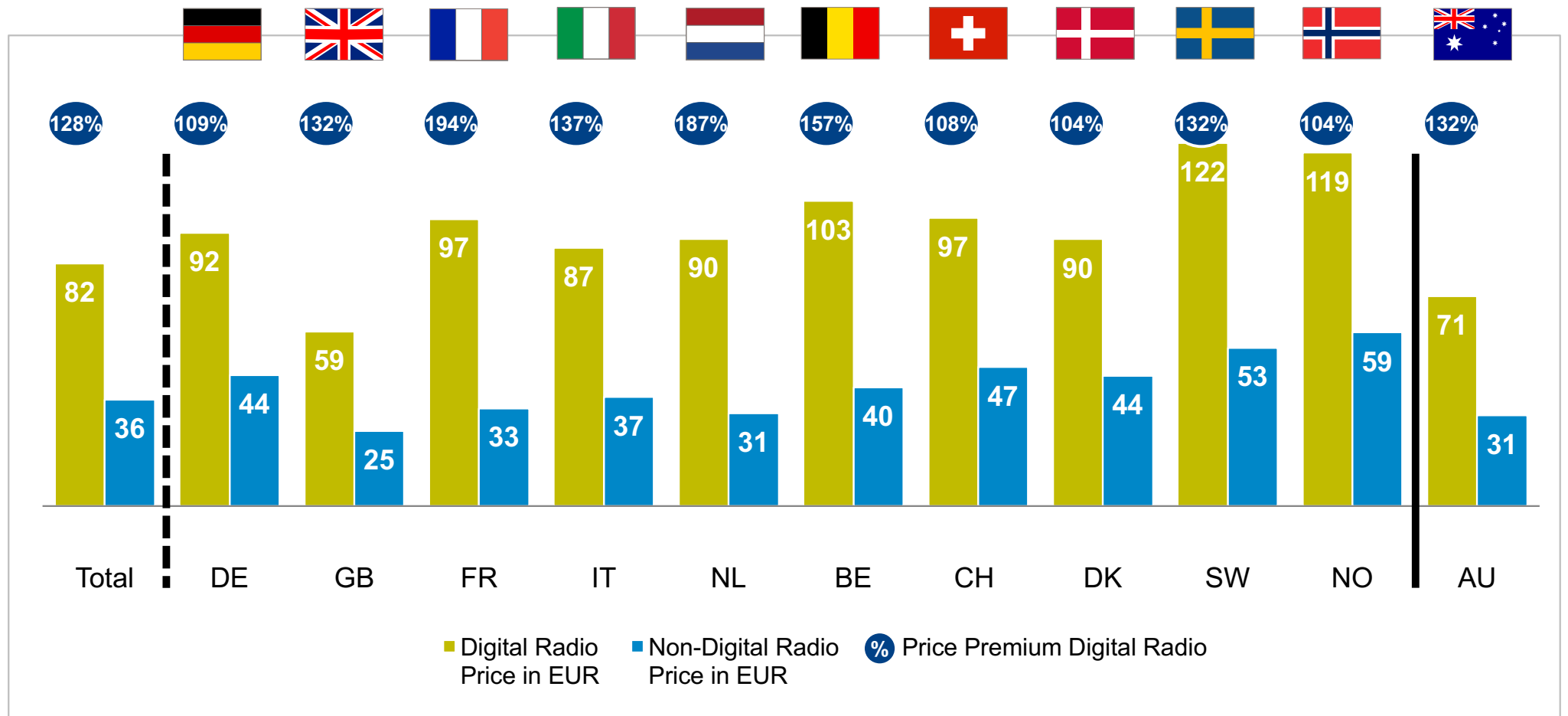
239

Period:
Sep10-Aug11

968

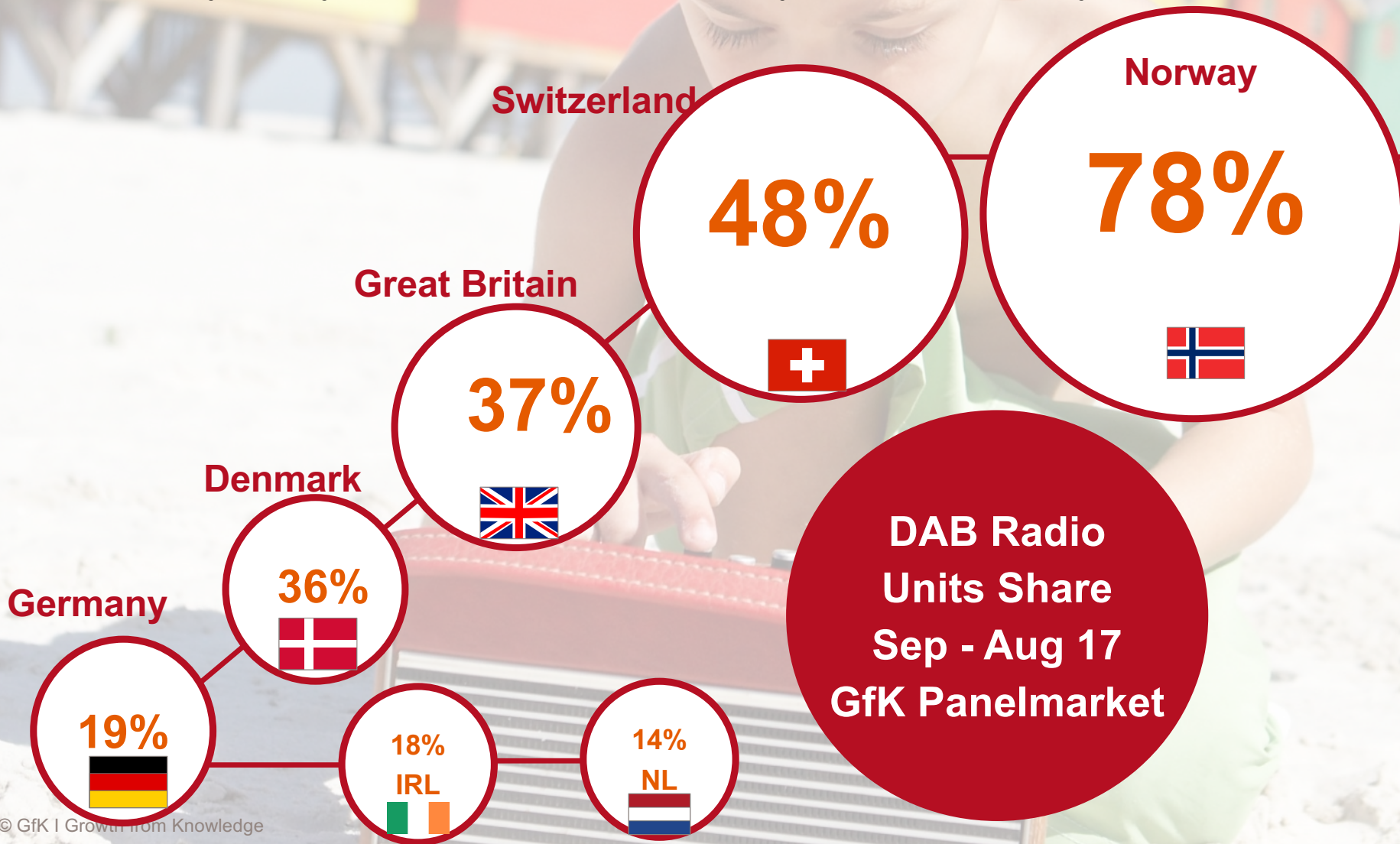
157

Radio Devices Table Top (Clock, Portable and Standard Radio): Consumer pays a significant **Price Premium of more than 100 %** for Digital Radio.



Source: GfK POS Tracking Panelmarket, Prices in Euro, Sep16-August 2017

In DE nearly every fifth is DAB, in CH every 2nd and Norway most 80%.



More than one quarter DAB Radio devices were sold online. For No DAB Device only 20 %.

ONLINE



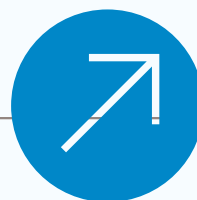
OFFLINE



**DAB Radio
Sales Value Share
Online vs. Offline
EU 4 (DE FR GB NL)**

26%

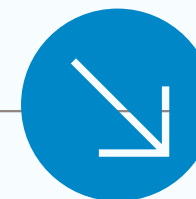
Jan – Aug
2017



23%

Jan – Aug
2016

74%



77%

4. Summary

Summary Digital Radio based on GfK POS Panel



More and more **Audio Products** are sold.
Growth drivers are Digital Radio, Streaming, Multiroom and Voice Activation.



The sales of Digital Radios are continuously **growing strongly**.
Increasing Number of SKUs/models and brands at the POS. Also for **Internet** important



DAB is already a **mass product** in **NO, CH, GB and DK**.
Other DE, NL, Ireland with strong growth rates **on the way**.



Sales potential for retailers and manufacturers.




Questions and Answers ?



Stay in touch



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Your Growth from Knowledge

GfK Product Groups with Digital Radio














- 7 GfK Product Groups with Digital Radio: Year reflects data availability

PG/ Country	Clock Radio	Portable Radio	Radio Boombox	Audio Home System	Tuner	Receiver	Car Audio (After Sales)
DE 	Before 2004	Before 2004	Before 2004	Before 2004	Before 2004	Before 2004	Before 2004
CH 	2008	2008	Before 2004	Before 2004	Before 2004	Before 2004	Before 2004
FR 	Before 2004	Before 2004	Before 2004	Before 2004	Before 2004	Before 2004	Before 2004
IT 	Before 2004	Before 2004	Before 2004	Before 2004	Before 2004	Before 2004	Before 2004
DK 	2012	2012	Before 2004	Before 2004		Before 2004	
SE 	2012	2012	Before 2004	Before 2004		Before 2004	
NO 	2013	2013	2013	2013			
NL 	Before 2004	Before 2004	Before 2004	Before 2004	Before 2004	Before 2004	Before 2004
BE 	Before 2004	2013	Before 2004	Before 2004	Before 2004	Before 2004	Before 2004
GB 	Before 2004	Before 2004	Before 2004	Before 2004	Before 2004	Before 2004	Before 2004
IE 	2007	2005	2005	2005			
AT 	2013	2013	2013	Before 2004	Until 2009	Before 2004	Before 2004
AU 	2008	2009	Before 2004	Before 2004		Before 2004	

Coverage Estimation



■ Coverage Estimation DAB

































































Coverage/ Country	Coverage GfK Panelmarket 2012	Coverage GfK Panelmarket 2013	Coverage GfK Panelmarket 2014	Coverage GfK Panelmarket 2015
DE 	70%	72%	76.5%	85.3%
CH 	92%	92%	92%	92%
FR 	93%	93%	93%	93%
IT 	88%	87%	88%	88%
DK 	92%	92%	92%	92%
SE 	85%	84%	84%	84%
NO 	90%	85%	85%	76%
NL 	89%	86%	84%	85%
BE 	90%	91%	91%	91%
GB 	95%	95%	95%	95%
AT 	96%	95%	95%	96%
IE 	87%	90%	90%	90%
AU 	90%	90%	90%	90%

In order to get **Total Market** Figures, the Panelmarket data needs to be calculated according to the estimated coverage rate, e.g. assumption of 85.3% for Germany in 2015.



GfK Audited and covered Channels

■ Audited and Covered Channels

Channel/ Country	Traditional El. Ind. & Buying Groups	Technical Superstores and Chains	Department Stores/Mail Order Houses/ Pure Player	Hypermarkets/ Cash&Carry/ Supermarkets	Computer Shops/Office Equipment Retailer/ Telecom Retailer	Photo Retailers	Car Audio (only relevant for Car After Sales Radios)
DE 							
CH 							
FR 							
IT 							
DK 							
SE 							
NO 							
NL 							
BE 