

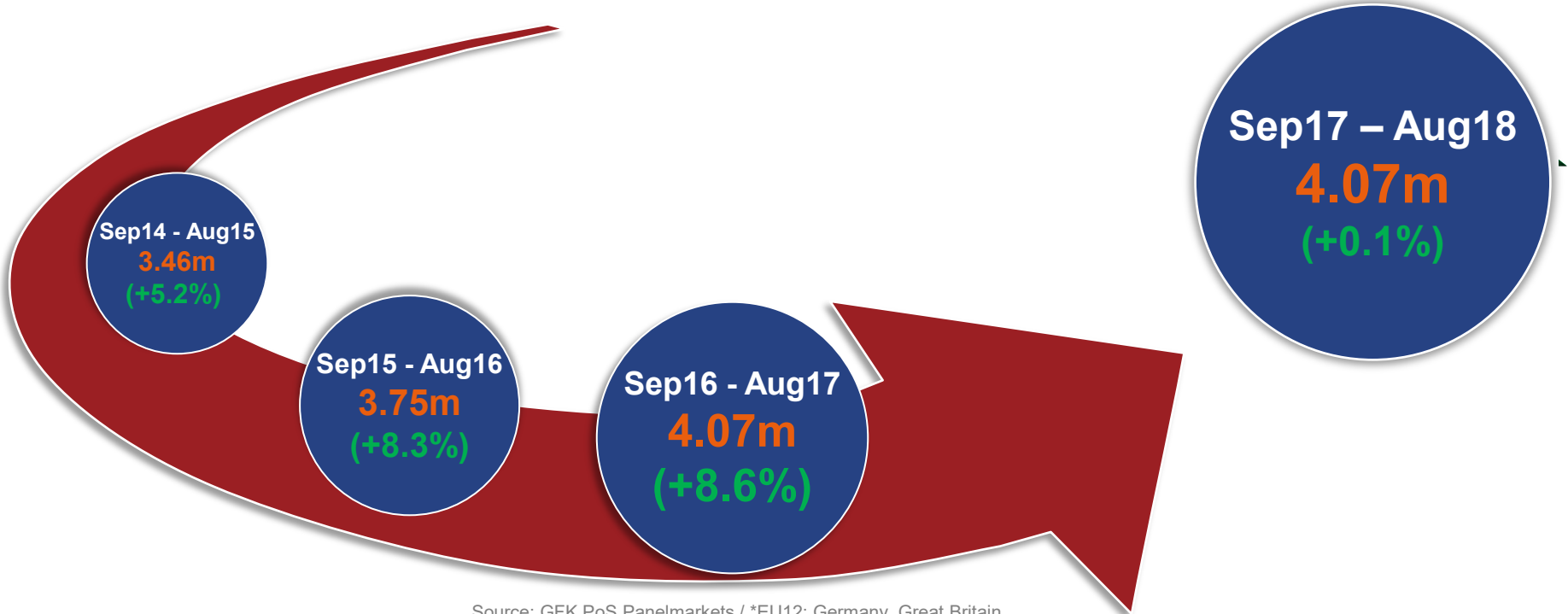


DAB Market – Current status and threads

WorldDAB General Assembly Berlin | 07th November 2018

Jan Lorbach | Regional Senior Market Insights Manager

DAB device sales in Europe12* + Australia: Strong growth in recent years, latest performance has slowed down









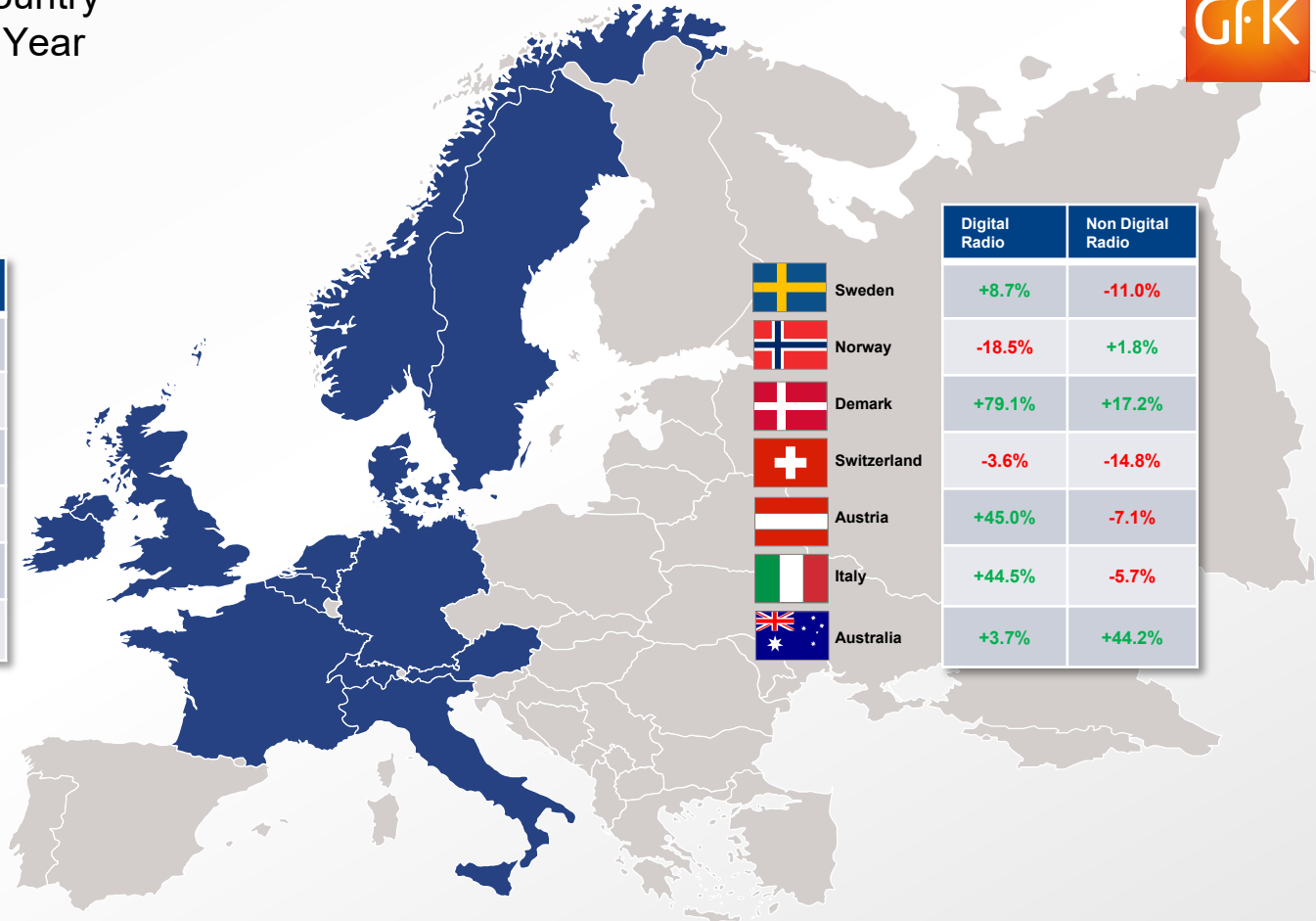
Source: GfK PoS Panelmarkets / *EU12: Germany, Great Britain, France, Italy, Netherlands, Belgium, Switzerland, Denmark, Sweden, Norway, Australia, Ireland, Austria








DAB Development by Country

+/-% Sales vs. Previous Year



	Digital Radio	Non Digital Radio
 Great Britain	-12.1%	+40.0%
 Republic of Ireland	-3.9%	-0.3%
 Belgium	+61.0%	-11.0%
 Netherlands	+20.1%	+0.3%
 Germany	+8.8%	-9.3%
 France	+25.2%	+1.3%



	Digital Radio	Non Digital Radio
 Sweden	+8.7%	-11.0%
 Norway	-18.5%	+1.8%
 Denmark	+79.1%	+17.2%
 Switzerland	-3.6%	-14.8%
 Austria	+45.0%	-7.1%
 Italy	+44.5%	-5.7%
 Australia	+3.7%	+44.2%

Why are established countries declining?

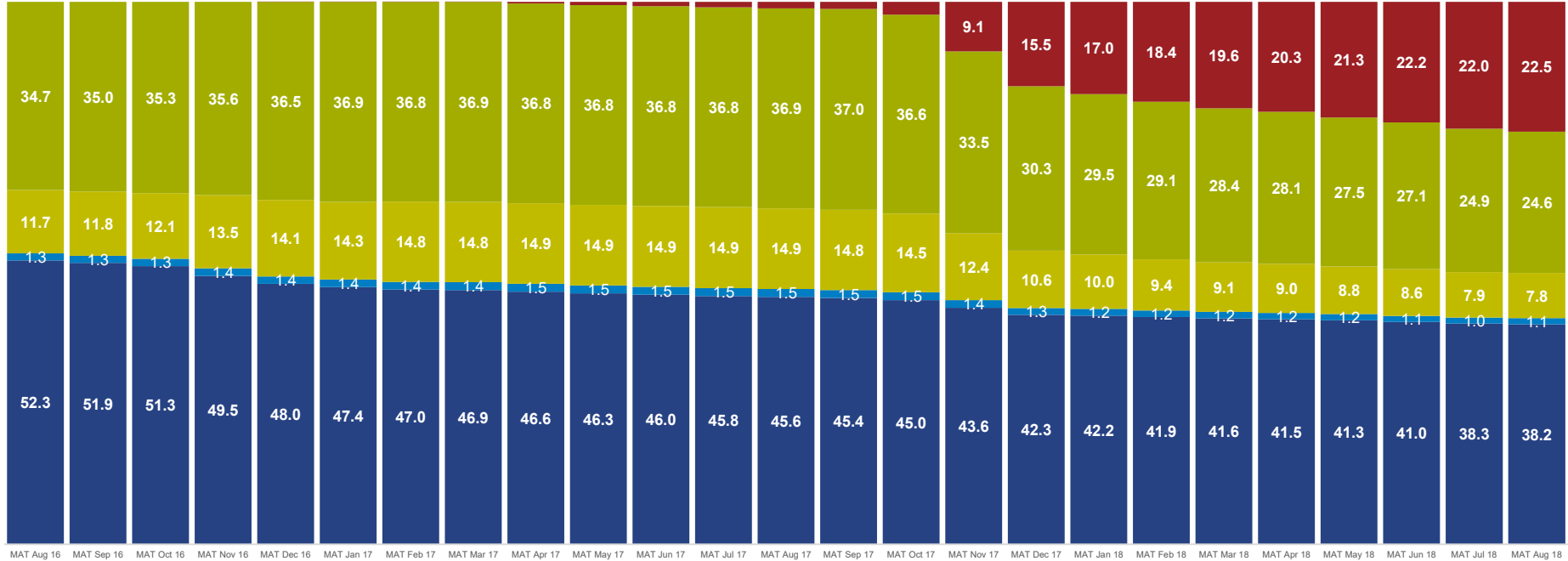
AI Speaker gaining weight within the market now accounting for over a fifth of the market



Total Radio excluding Car Audio

GB Panelmarket

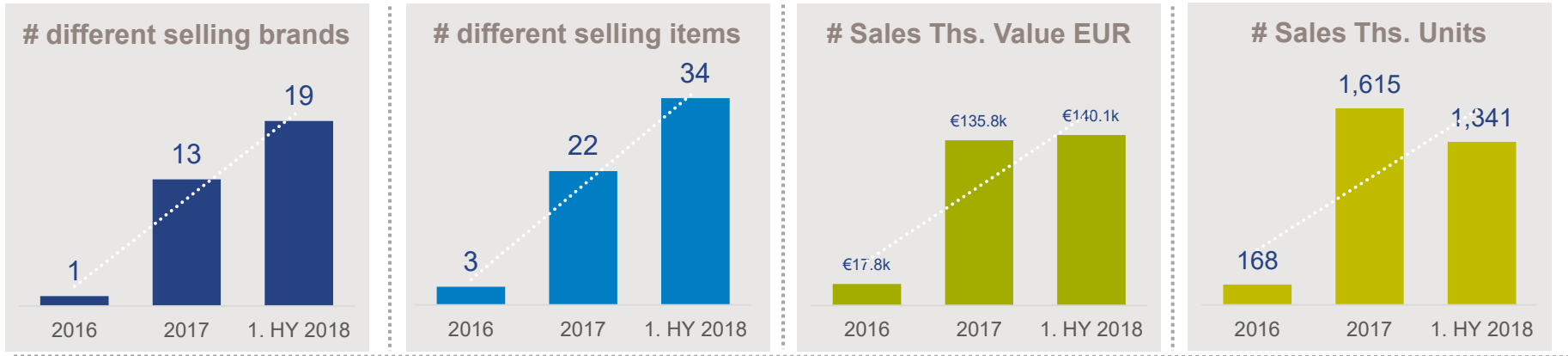
Sales Units



Source: GfK PoS Panelmarket

■ FM Radios ■ DAB and IP Radios ■ IP Radios ■ DAB Radios ■ AI Speaker

AI Speaker development in EU10: Total market size 1. HY 2018: 140,1 Mio. EUR





Spotlight on Digital Home Assistants Activities

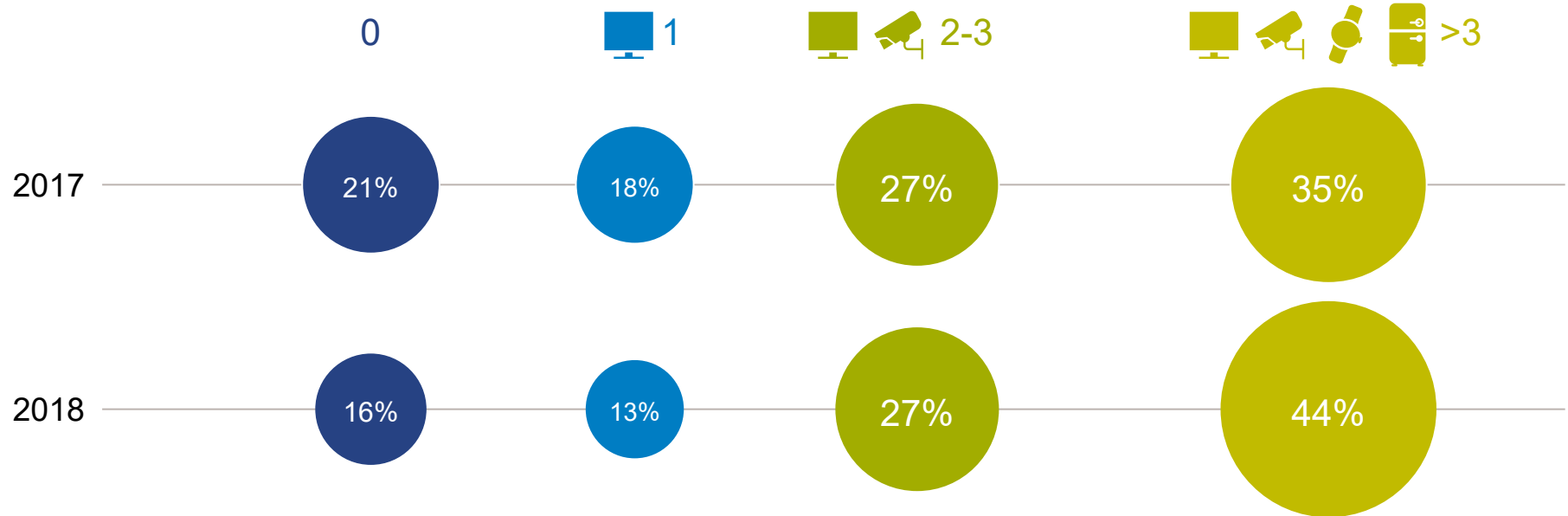


Music, news, and answering questions are the top three activities that consumers are performing with their AI speaker.

In line with rising sales, reported ownership of smart home devices is growing - particularly in the proportion who say they own 4 or more products

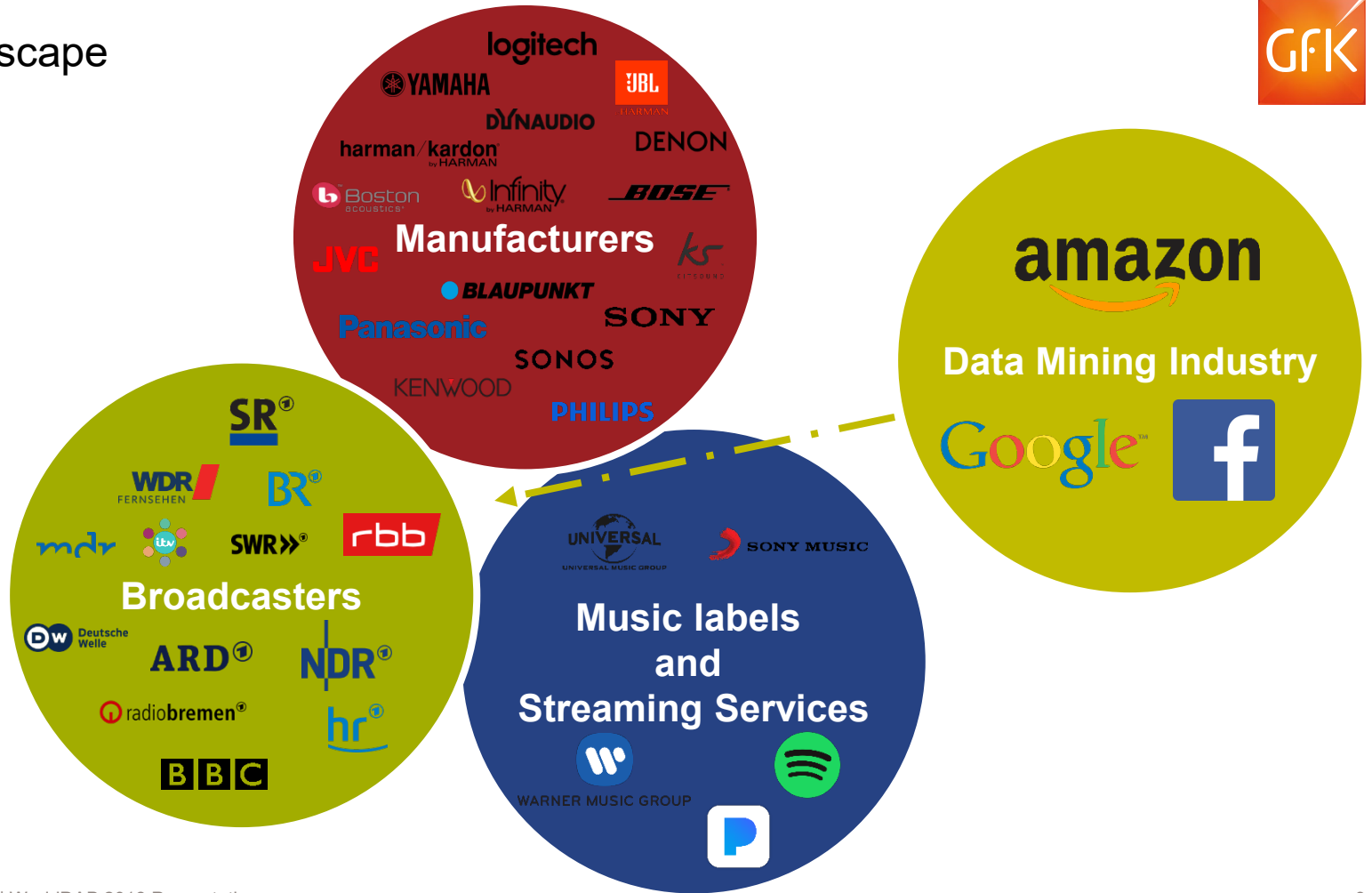


Smart home product ownership

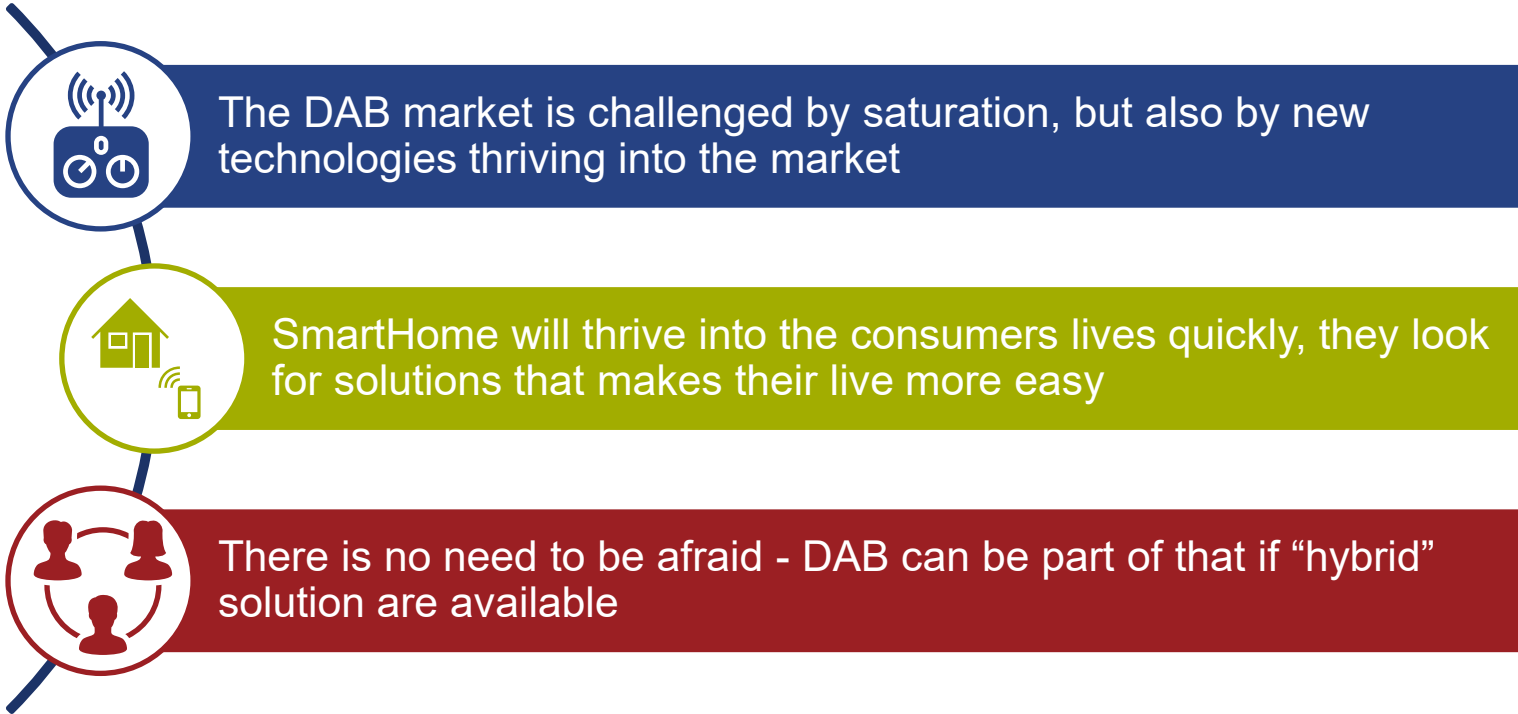


D02. Do you currently use or are you interested in using any of the following smart home products or services within your household? Base: All respondents: 1000 in 2018, 1002 in 2017,

Audio Landscape



Summary



Thank you!

Jan Lorbach
Regional Senior Market Insights Manager
Jan.Lorbach@gfk.com
GfK UK Ltd