

tech^{UK}

FMexit?

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Director, techUK**



Who Are techUK?

The UK's leading technology trade association - 850 technology companies that are defining today the world that we will live in tomorrow.

Value to members across four key areas:

Develop Networks

Reduce Cost

Develop Markets

Reduce Risk

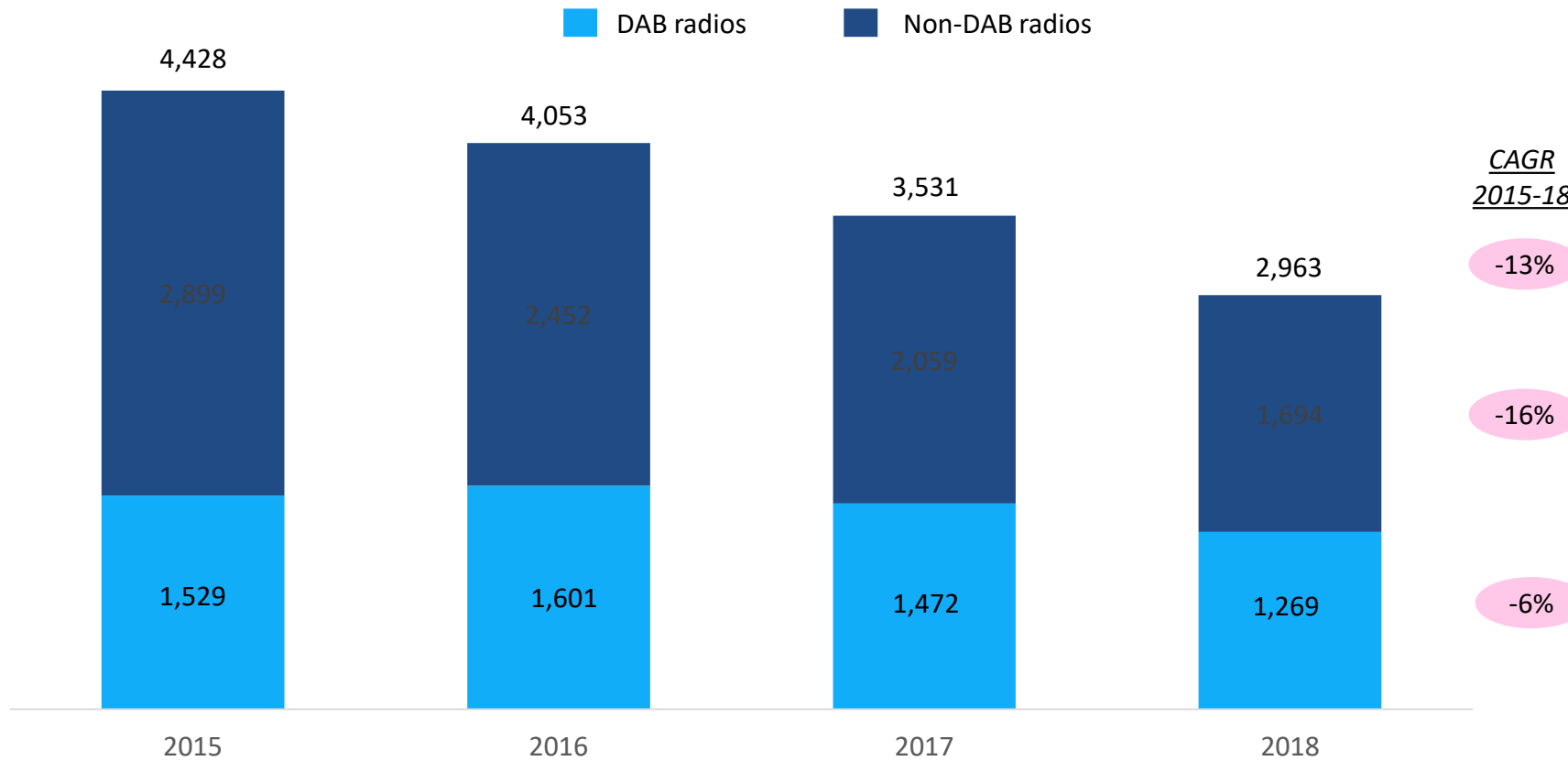


Our Agenda for UK Radio

- Support radio device sales (declining market)
- A voice for device manufacturers/ supply chain on the future of UK radio
- Support a regulatory landscape that enables continued growth of digital radio and audio services
- A Government led 'future of radio' review that supports radio manufacturers
- A decision on Digital Switch Over
- Regulation that ensures all radio devices are digital

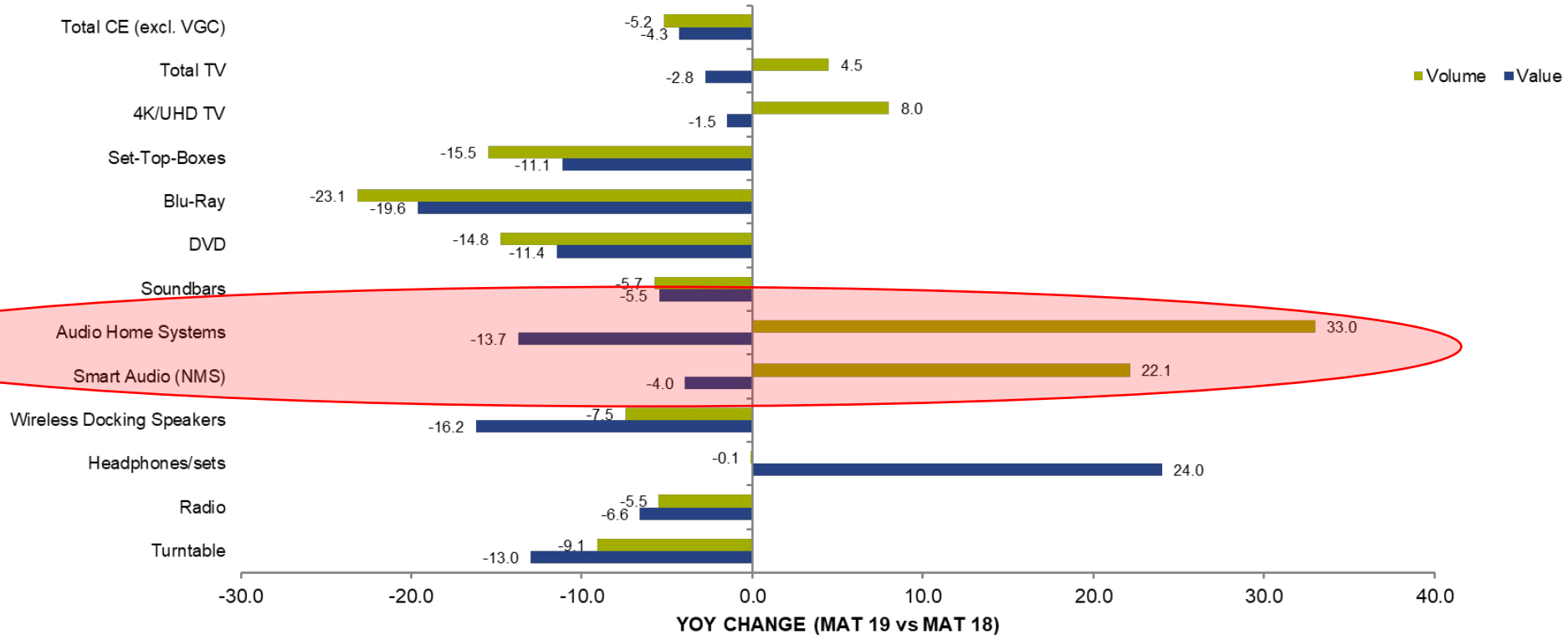


Radio Device Sales In Decline



Are Streaming Speakers the New Radios?

GFK: UK 9/18 to 8/19

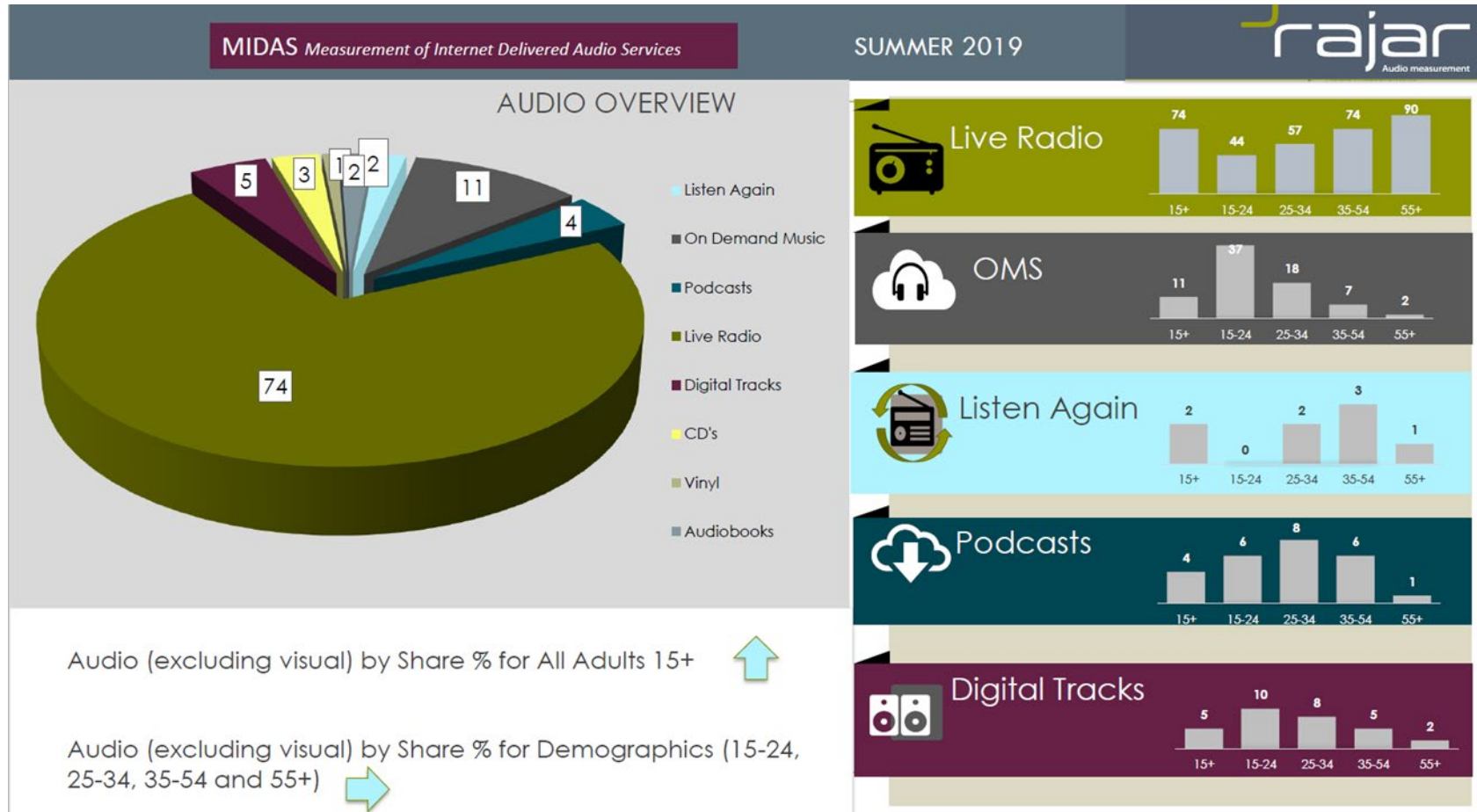


Digital Listening reaches 56.8% in Q3 2019 (RAJAR)

- Digital listening increases year on year to 56.8% up from 52.4% last year
- Overall digital listening grew by 24.1m hours (5% year on year)
- Listening via DAB grew by 2 million hours (0.5%) to now account for 39.7% of all listening & 70% of digital listening
- 28% of UK adults now claim to own a voice activated speaker
- Listening via online/apps grew by 22.5 million hours (or by 33%)
- Digital Listening in car grew by 15.2 million hours (17.4% year on year). 93% of new UK cars now come with DAB.



Live Radio is holding share of listening

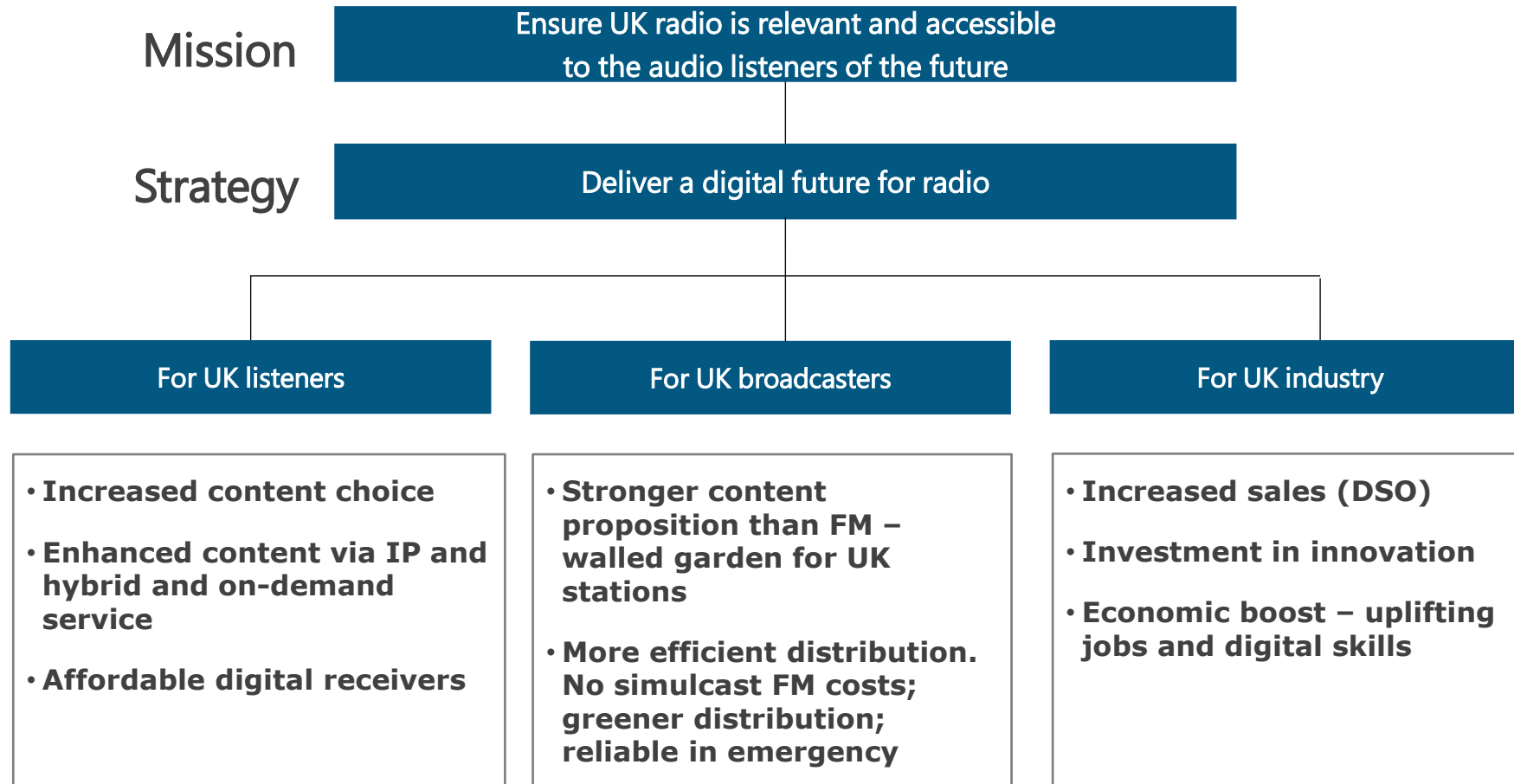


Government Backed Review Underway

- Joint Government/industry review to ensure a robust and vibrant future for UK radio and audio sector
- Three dedicated work-streams – Listeners; Technology and Automotive; Networks and Distribution
- First phase of project initiation complete and work-streams signed off
- Final recommendations and actions report - Oct 2020



UK Radio – Future Vision



Looking To The Future

- No appetite from some broadcasters to commit to a DSO
- Device manufacturers need to find revenue growth in non-radio categories (e.g. Streaming Speakers)
- Reluctance from broadcasters to invest more in DAB network
- Roll out of 5G likely to support further growth of IP radio services
- Digital receiver mandating for devices





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