

COMMERCIAL BUSINESS CASE STUDY

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JOINT WORLDDAB & ABU WEBINAR SERIES – DAB+ DIGITAL RADIO TECHNOLOGY,
IMPLEMENTATION & ROLLOUT

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REMAINING COMPETITIVE – RADIO IN AUSTRALIA

- 260 commercial radio stations
- 12 main radio networks
- Most listening remains via broadcast radio, with digital listening on the rise*
- Live radio, including dab+, accounts for a prevailing 61.3% of all audio listening in Australia
- \$643M in metropolitan ad revenue in 2019/20
- Radio still most preferred in-car audio
- Smart speaker ownership has increased 340% in the last two years*
- Radio in a good position to benefit from economic recovery



REMAINING COMPETITIVE – DAB+ IN AUSTRALIA

- DAB+ network coverage is now 64% of the population
- Permanent DAB+ services on air in 9 markets
- 52 vehicle brands support DAB+, with DAB+ factory fitted in 75% of new cars
- Over 6 million DAB+ enabled devices have been sold as of Q3 2020
- 30.9% of all people 10+ listening via DAB+ and DAB+ station listening via any platform*



REMAINING COMPETITIVE - STRATEGY

Invest in DAB+ and streaming

Develop and commercialise podcast brand extensions, partnerships and specialised content

Leverage voice tech and smart speakers

Simplify the process for advertisers via RadioMATRIX industry buying platform

Utilise hybrid audience measurement and research projects for deeper data insights



A MULTI-PLATFORM WORLD

DAB+ plays an important role in the evolving future of commercial radio, where audiences can freely access radio in multiple ways



Each platform provides benefits for different sections of the community at different times of the day. When combined, they create a successful and thriving radio industry.

INCUMBENTS ARE WINNERS – LISTENERS

A richer radio experience

More choice of stations

Better sound quality

Easy, intuitive tuning and station selection



INCUMBENTS ARE WINNERS – BROADCASTERS

Cheaper and greener to operate

Spectrum efficiency attracts more listeners, advertisers and meets government needs

Strengthens product offering and increases reach of metro and regional stations

Monetise brand extensions and package alongside traditional AM/FM stations

Enables future innovation and sustainability



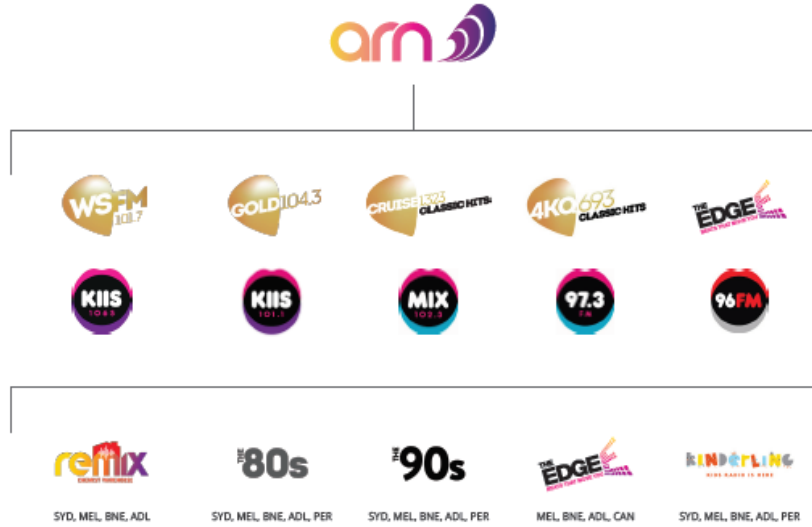
INCUMBENTS ARE WINNERS – ADVERTISERS

Stacked buying

Targeted and integrated

Reach new niche audiences

Affordability and simplicity



WHY RADIO IS ESSENTIAL DURING EMERGENCIES – OVERVIEW

- 74% of listeners look to radio to provide information during an emergency situation*
- Audiences turned to radio for information, news, entertainment and companionship during the height of COVID-19 restrictions and lockdown in Australia
- GfK study showed listening increased by an average of 1 hour and 46 mins a week during lockdown, with 72% of Australians listening to as much or more radio during restrictions*
- 220 of the 260 commercial radio stations in Australia are in regional areas
- Radio is a vital part of communications plans in the height of emergencies, as stations provide rolling local coverage of news and important information with regional communities



**Source: GfK Radio Insights Summer Listening Survey, January 2020 & GfK Radio Insights COVID-19 Study, April 2020*

WHY RADIO IS ESSENTIAL DURING EMERGENCIES – DAB+ CAPABILITIES

Dynamic use of spectrum efficiency

Access to emergency information, irrespective of location

DAB+ functionality well suited to Australians living in regional areas

Broadcast emergency services feeds as text and slideshows

Rich multimedia support for information delivery



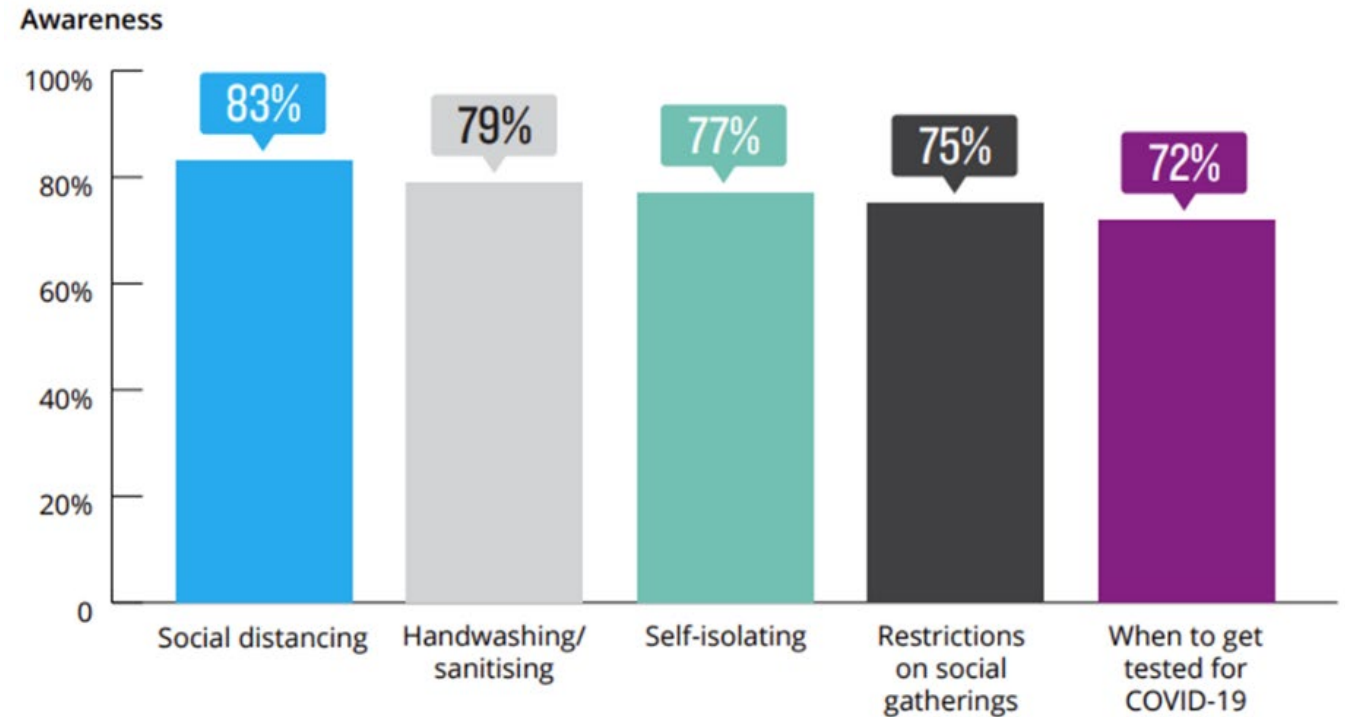
WHY RADIO IS ESSENTIAL DURING EMERGENCIES – REACH & RELIABILITY



- Reach, robustness and reliability makes radio a vital means of broadcasting information in times of emergency:
 - Mobile phone towers and other infrastructure are often damaged or overloaded
 - Access to other broadcast channels is impacted by the situation and emergency conditions
 - Right there with live and local coverage
 - Direct contact with a large number of people in an emergency
 - Strong presence and connection in local communities

WHY RADIO IS ESSENTIAL DURING EMERGENCIES – EFFICIENCY

- 72% of listeners trust radio to give them up-to-date information about COVID-19*
- Radio has been an important channel for Federal Government information campaigns during the COVID-19 pandemic
- Radio advertising increased awareness and understanding of the Federal Government's COVID-19 campaign messages, with more than 6 in 10 listeners recalling hearing COVID-19 messaging on radio*



Source: GfK Radio Insights COVID-19 Study, April 2020 & GfK Radio Effectiveness Study – COVID-19 (Federal Government)

WHY RADIO IS ESSENTIAL DURING EMERGENCIES – RECOVERY

- Radio provides ongoing support, news updates and assistance during emergency recover efforts, including sharing of recovery initiatives, implementing fundraising avenues, raising awareness and sharing local stories
- Radio plays a role in building community resilience, bringing communities together
- Radio can make a meaningful contribution to Australia's economic recovery, helping businesses to rebuild and connecting directly with consumers
 - Providing advertisers with high visibility and access to influential and connected radio talent
 - A cost-effective choice for advertisers with associated low production costs and immediacy in turn around
 - A trusted, brand safe environment for advertisers
 - Enables advertisers to keep their brand top-of-mind with consumers as they look to restart their marketing and advertising plans



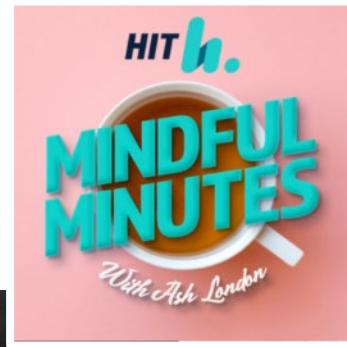
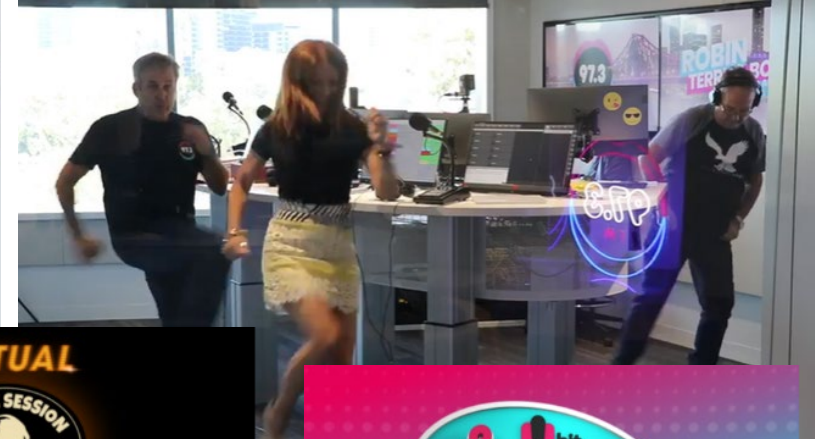
WHY RADIO IS ESSENTIAL DURING EMERGENCIES – COMMUNITY SUPPORT

Radio stations and shows continue to assist local communities and individuals in recovery efforts after disasters via:

- Fundraising efforts
- Support of local businesses and organisations
- Directly helping individuals and groups
- Sharing of stories and thanking first responders
- Other awareness initiatives



WHY RADIO IS ESSENTIAL DURING EMERGENCIES – COMMUNITY SUPPORT



THANK YOU

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