

Radioplayer - The Future of Radio

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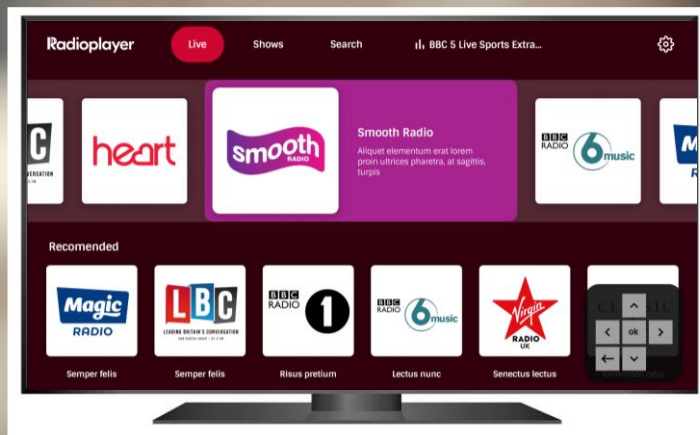
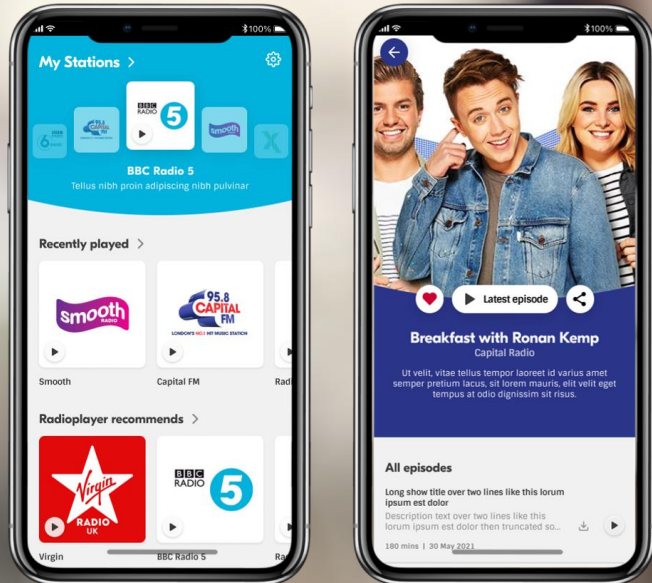
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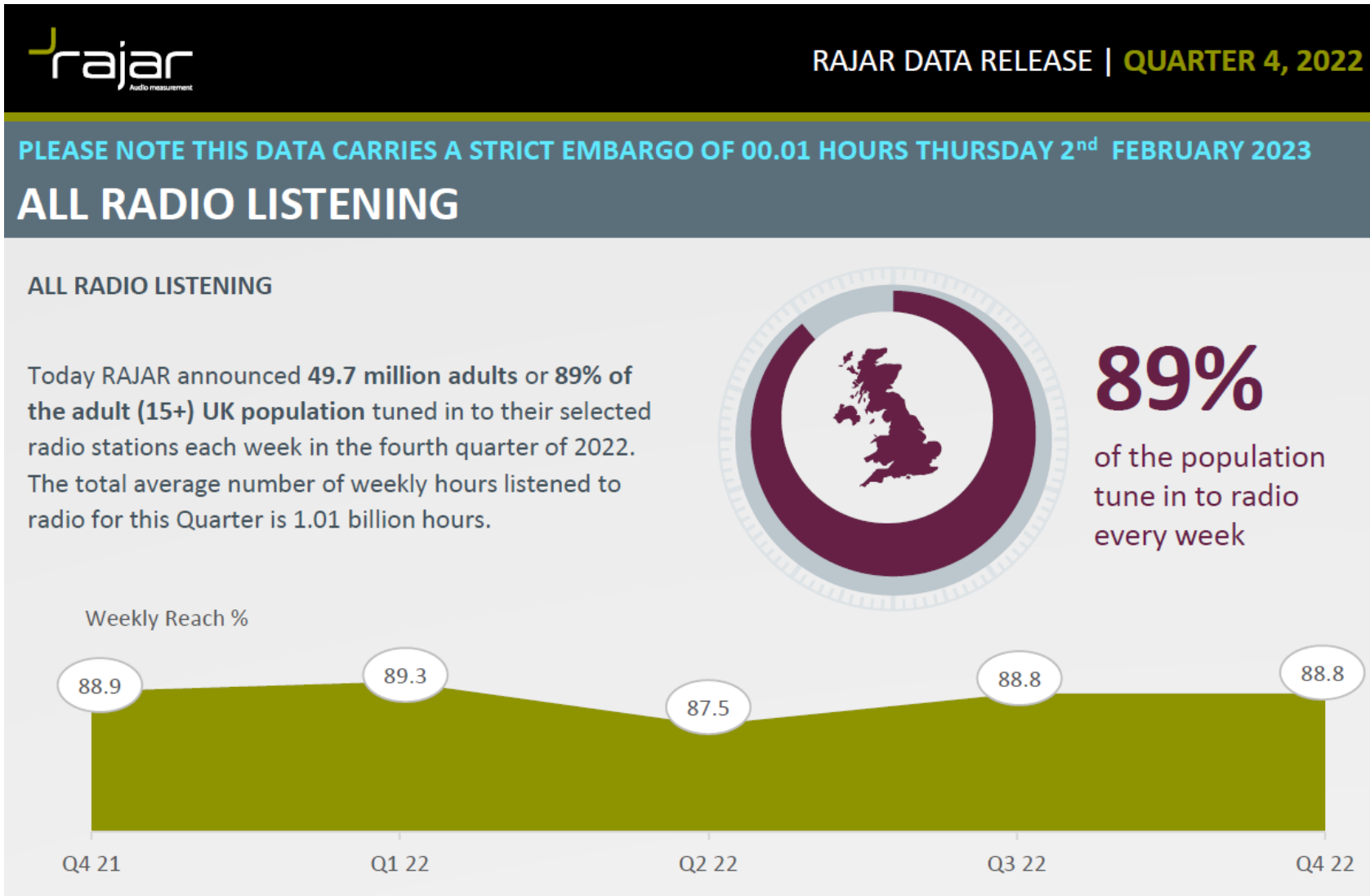
100 Years Old



..... and Still Going Strong



Nine out of Ten People in the UK are still listening



RAJAR/Ipsos MORI/RSMB

Two thirds of Listening Share is Digital

DIGITAL PLATFORMS

In terms of reach, 41 million adults aged 15+ are now tuning in to radio via a digitally enabled platform (DAB, DTV, Online/App, or Smart speaker) each week.

** Weekly reach is the number of people (adults 15+) in the UK who listened to a radio station for at least five minutes in the course of an average week during the quarter.*



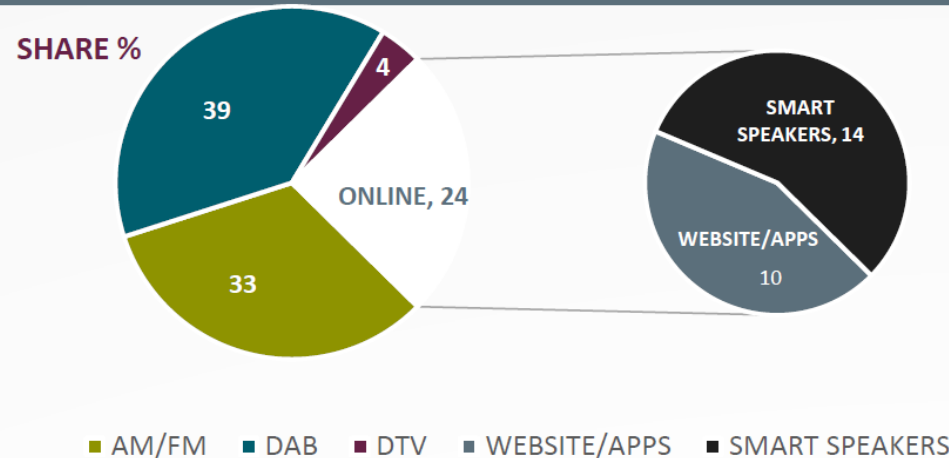
74%

of the population
tune in to digital
radio every week

PLATFORM SHARE OF ALL RADIO LISTENING

67% of weekly listening hours are consumed digitally. Listening via a DAB has 39% share of listening, Online has a 24% share and DTV is 4%.

AM/FM listening hours are a third with a share of 33%.



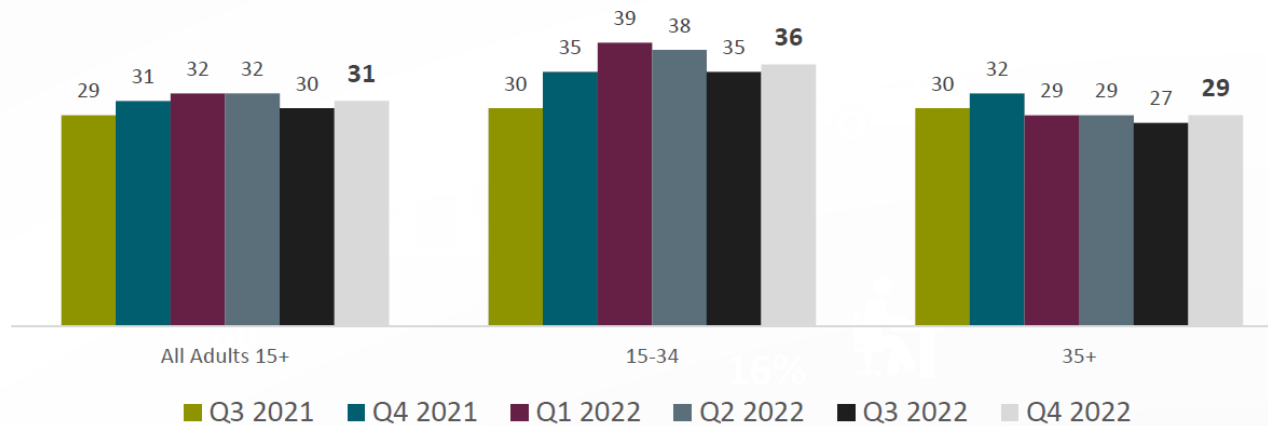
Q4, 2022, released February 2023

RAJAR/Ipsos MORI/RSMB

Importantly, Digital Radio Engages Younger Listeners

MOBILE/TABLET LISTENING

31% of Adults 15+ claim to listen to Live Radio via a Smartphone or Tablet at least once per month



SMART SPEAKER USAGE

64% of
speaker users
claim to use it for
listening to the
radio



32% of which
claim to use it to
listen to Radio
everyday

Q4, 2022, released February 2023
RAJAR/Ipsos MORI/RSMB

From the World's Largest Broadcaster-Backed Radio Platform - **WE ARE RADIOPLAYER**

- Across 17 countries in Europe and North America
- 100% owned and operated by many of the world's leading broadcasters
- Formed 11 years ago by the BBC and commercial radio in the UK as a strategic weapon in the fight to maintain radio's dominance



Products – focus on 3 main strategic areas



Radio in cars

- Providing reliable, official metadata feeds for connected cars
- Developing hybrid 'smart radio' designs with car companies
- App and voice integrations like Apple CarPlay/ Android Auto



Smart home devices

- Developing new integrations for smart speakers
- Talking to technology platforms with one voice
- Designing simple interfaces for smart TVs



Radioplayer Apps

- With apps which drive discovery
- Through world-leading web players
- By integrating commercial tools

Radioplayer

Consumer products

Ole Jørgen Torvmark

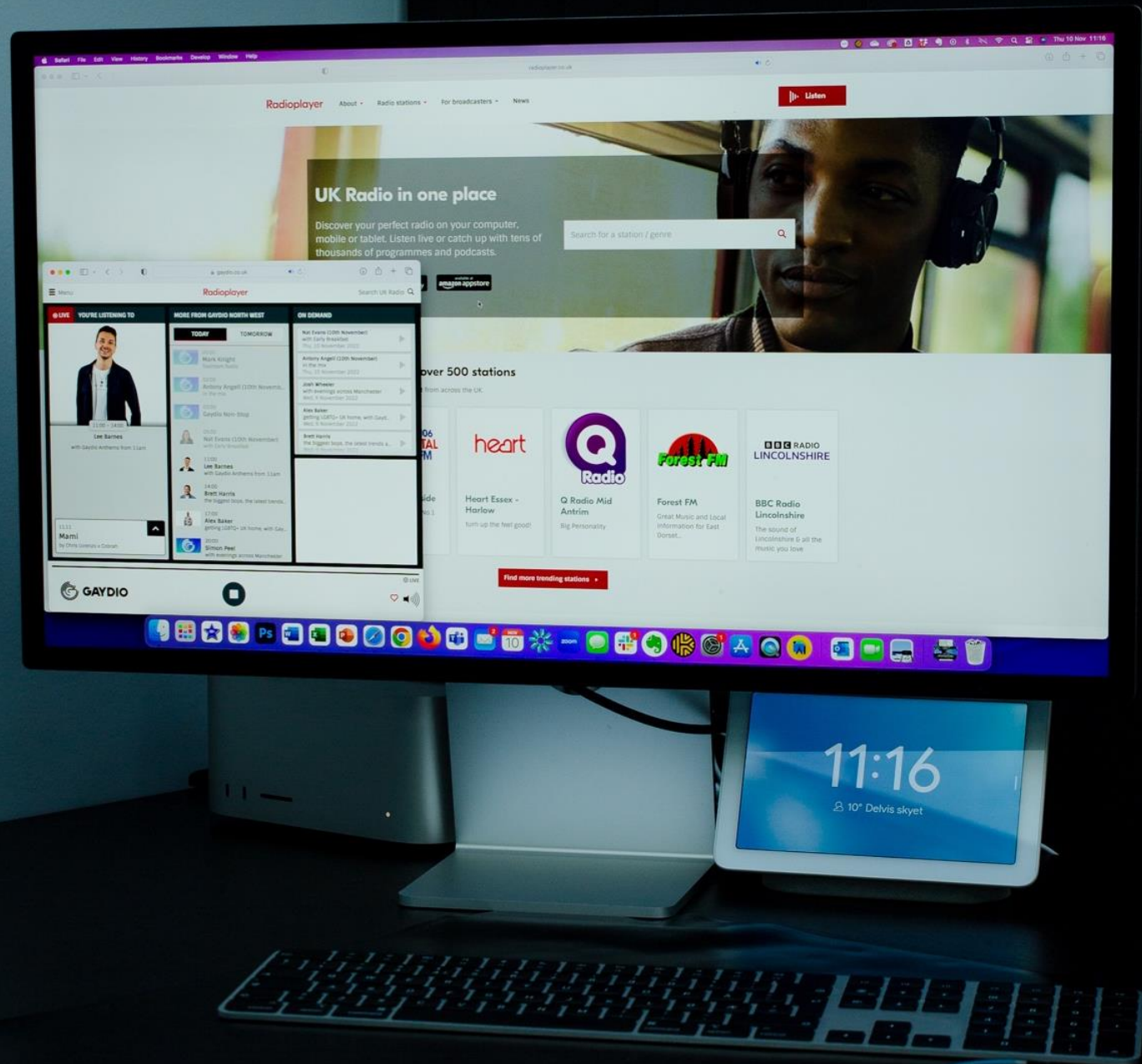
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Web players





Mobile apps

TV apps



Wearables apps



Sonos integration





Alexa

Radioplayer

Automotive products



Why is Automotive so Important?

- 25-50% of your radio listening takes place in-car
- Over 80% is broadcast radio - the “Radio” button
- The majority of new cars now have internet connectivity
- Technologies like Google’s Android Automotive operating system allow apps to be downloaded to the dashboard
- But more listeners choose Radio than any other form of audio

For car-buyers, broadcast radio is the most important in-car audio feature*



80%

of people planning to buy a car in the next 12 months are less likely to buy a car without a radio



89%

rank broadcast radio as the most important audio feature in-car. More than online music services, Apple Carplay or Android Auto



90%

of car buyers believe broadcast radio should be standard in every car

Radioplayer **PRIORITY**: How to ensure your listeners keep on choosing Radio?



Radioplayer already powers over a third of new cars sold in Europe through our existing partnerships - this will grow to over 50% by 2025

Some Current Radioplayer partners:



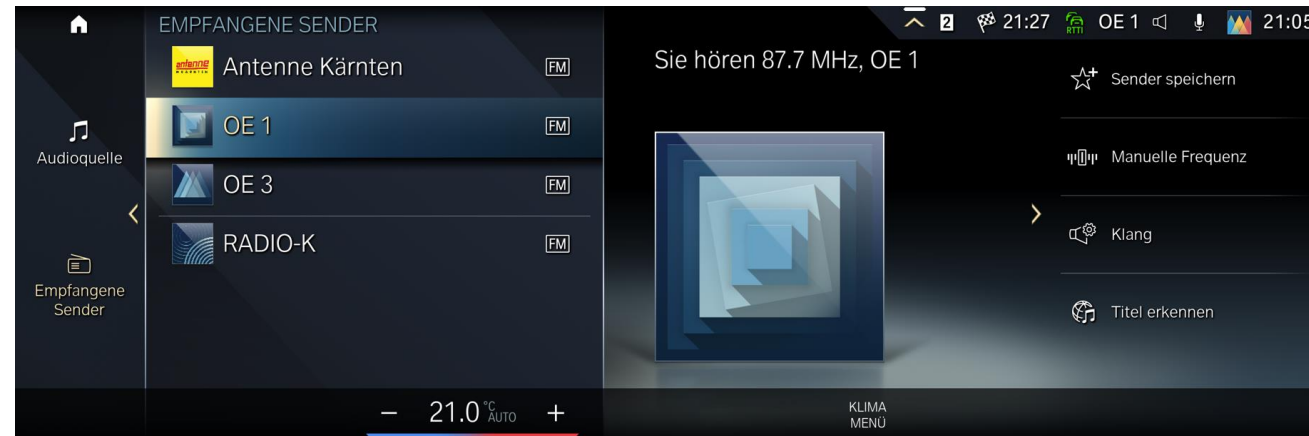
- Over 2 Million cars on Europe's roads are powered by Radioplayer today
- This will rise to over 10 Million by 2025
- We power the Radios in 34 car models today , rising to over 45 during 2023
- We have partnerships with three car groups representing over 30% of Europe's cars sales
- More car company partnerships will be announced in 2023

Metadata is the Future

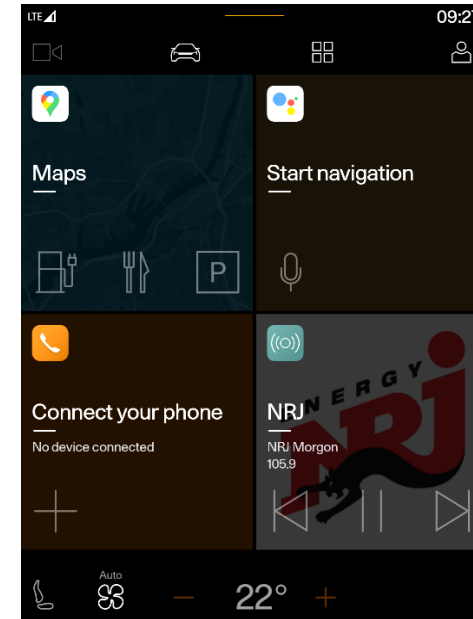
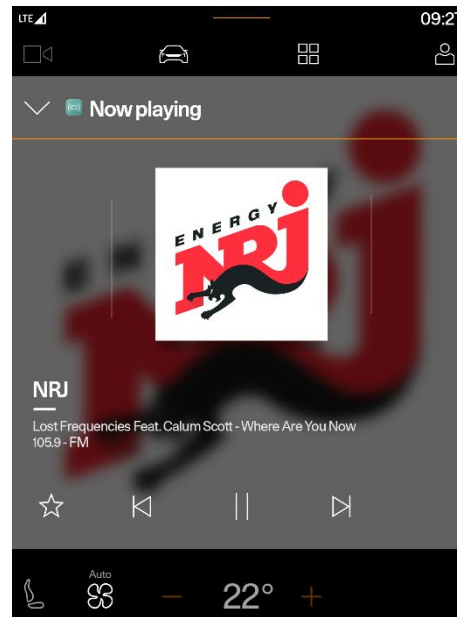
Station in
Radioplayer:



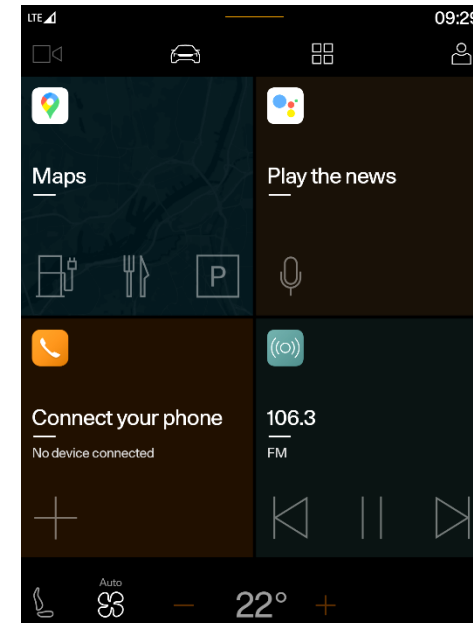
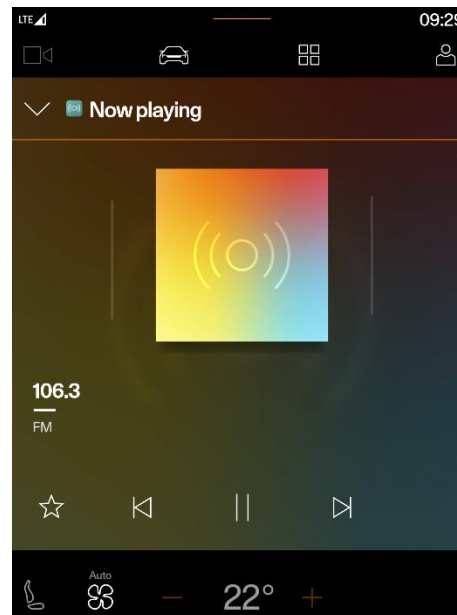
Station **NOT** in
Radioplayer:



Station in Radioplayer:



Station **NOT** in Radioplayer:



Station logo prominent on the home screen with Radioplayer:



Station logo and programme information prominent on the now-playing screen with Radioplayer:



Automotive user analytics

As part of our partnerships we ask our car company partners to provide us with user analytics which we make available ONLY to our broadcasters. During 2023 they will be able to access data which includes:

- Station name, total time spent listening
- Listening platform – FM, DAB, or IP (if a hybrid DAB/FM/IP radio)
- Number of vehicles listening to each station
- Country/Rough location

Our aim is to keep radio strong in cars with Hybrid Radio

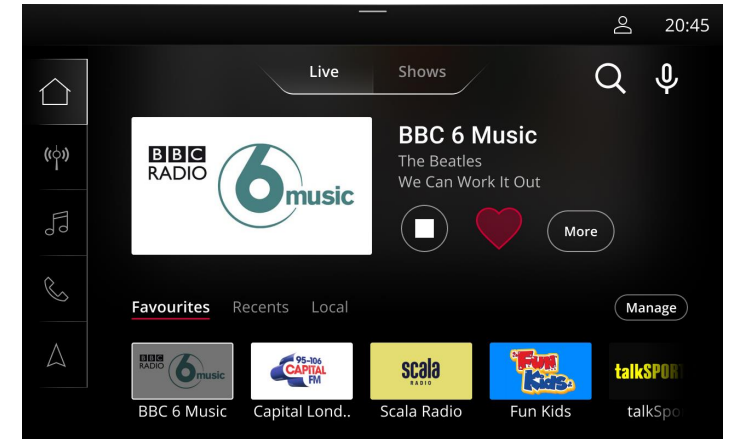
RADIO BUTTON



CAR



DATA



Radio powered by FM
together with IP

Radio's place at the heart of the in-car entertainment experience: A future vision for radio in-car

- Hybrid FM and internet
- Rich with podcasts
- Enhanced with visuals
- Perfect voice control
- Personalised

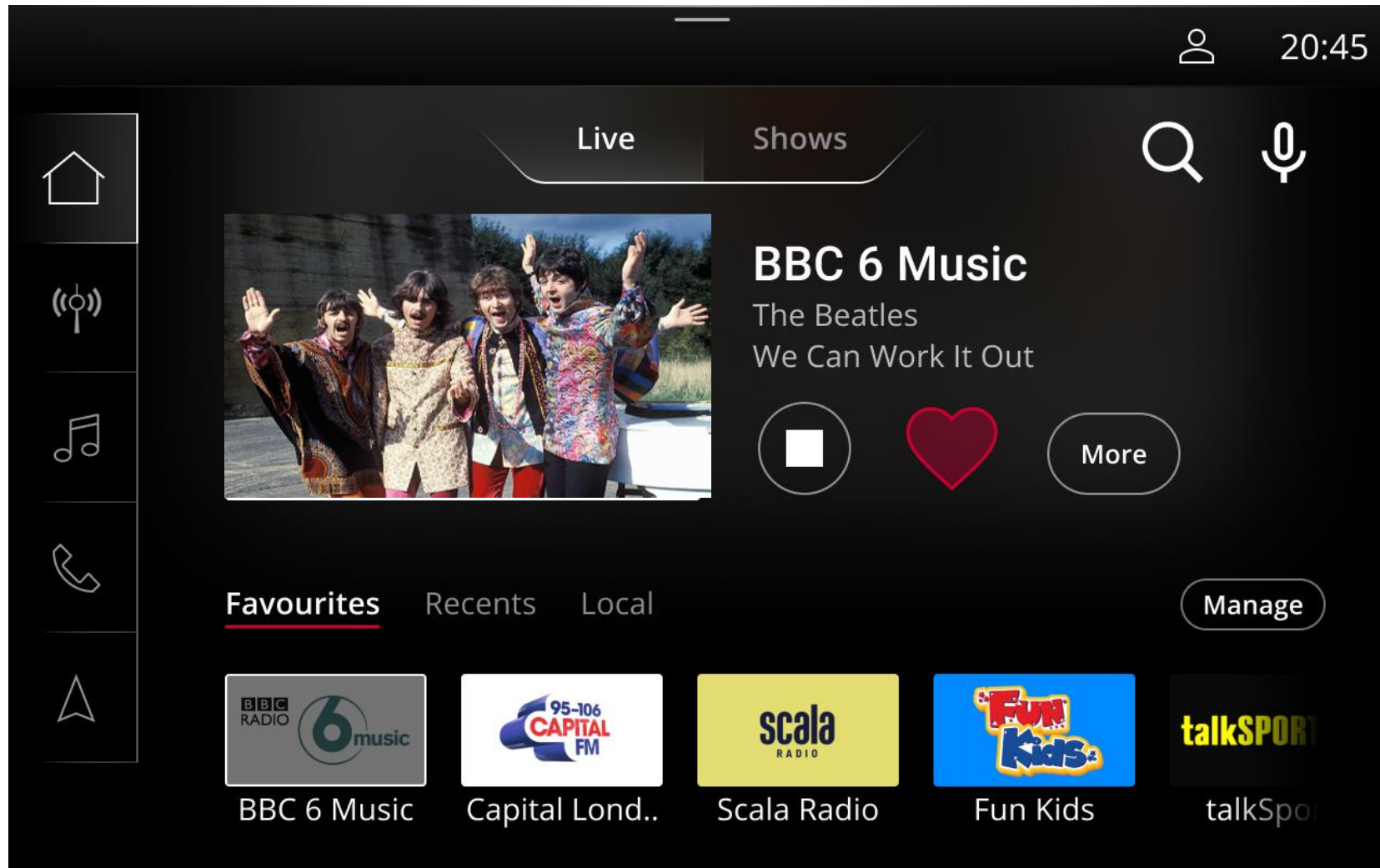


If we can get the metadata right, the future of car radio could be...

- Enhanced with visuals
- Rich with podcasts
- Voice controlled
- Personalised



Radio must look contemporary in car and on connected devices



Massive changes to cars dashboards: Connectivity, big screens, new technology



Radioplayer Future Gazing

- Car radio of the future will be hybrid. Meaning that a listener to a station on FM can be switched to programmatic advertising over IP
- The ability to insert visuals into the radio stream via IP
- The knowledge of where a car listener actually is, for hyper local advertising and what the listener is like
- The ability to offer discount voucher to users dashboard or phone
- Analytics from car users will give us a better insight into radio listening



AFEELA: A New Brand From Sony/Honda



Photo Credit: Sony Honda Mobility

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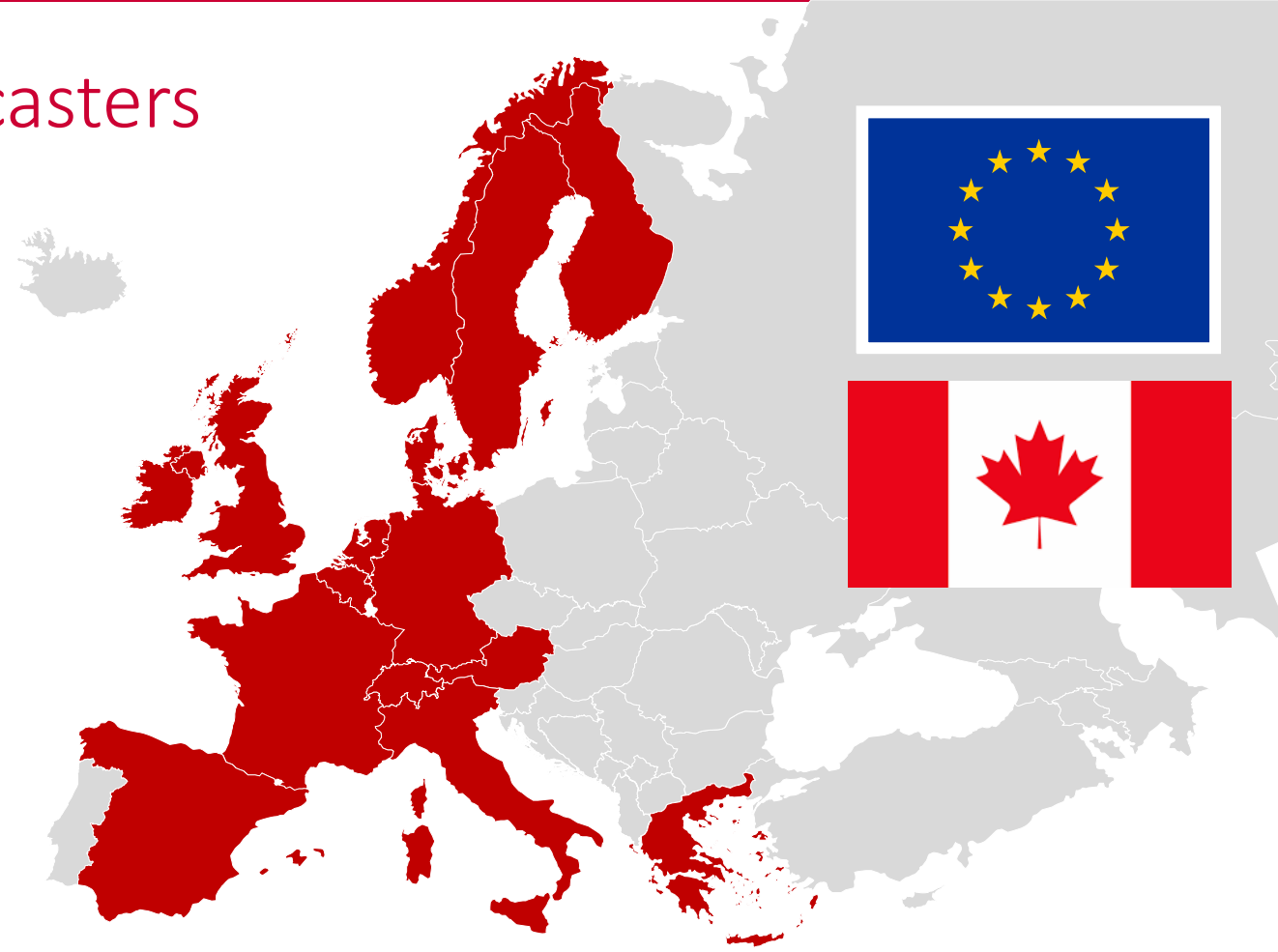
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GREECE

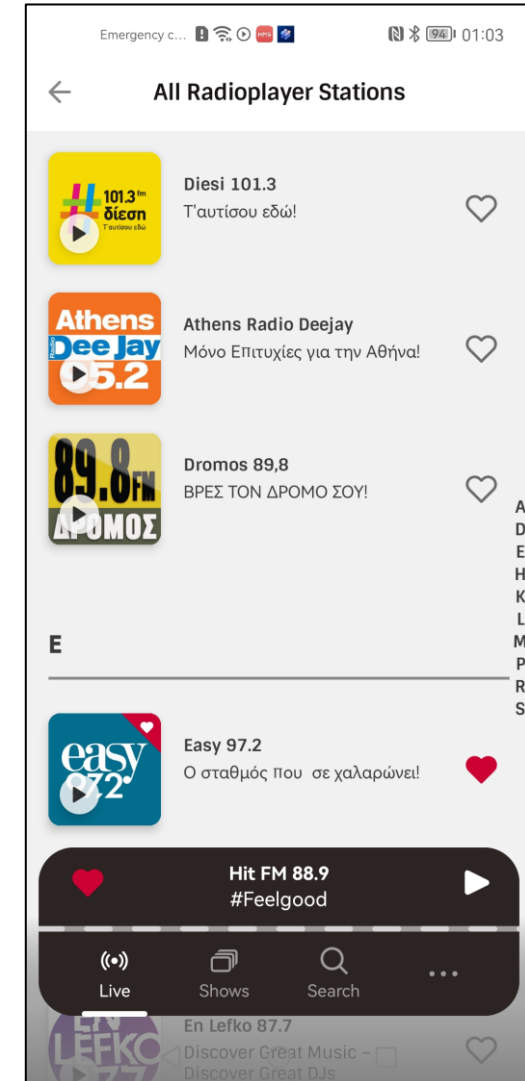
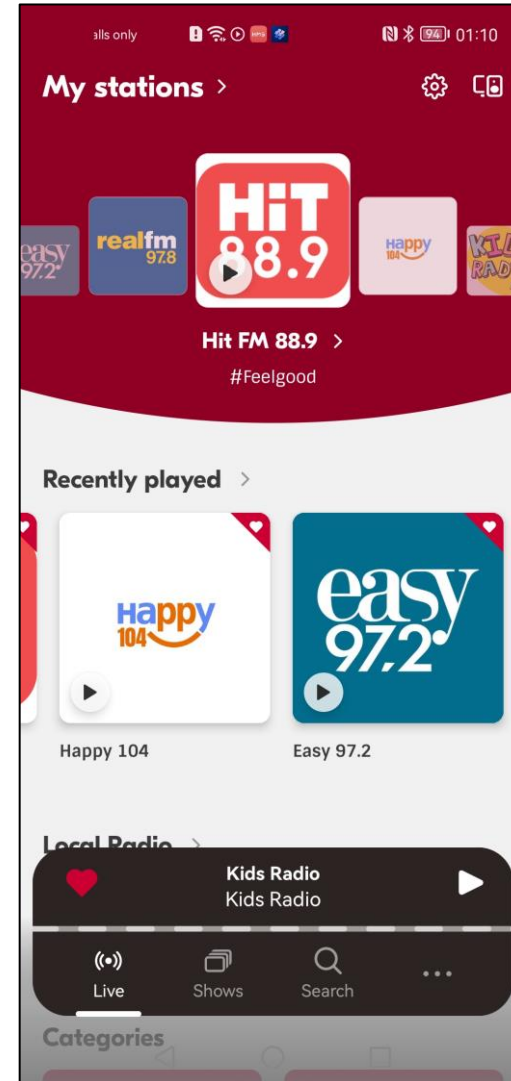
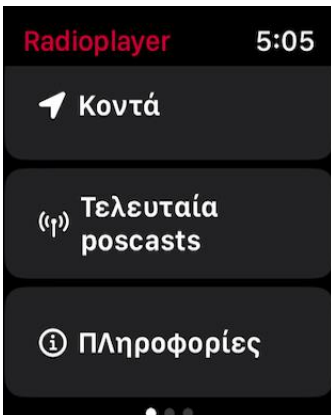
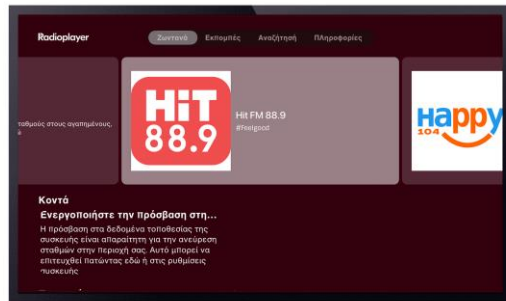
Radioplayer represents broadcasters
across Europe and in Canada



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**Radio
player**