



DASH Takeaways

Executive Summary

Radio Ink, SCG, and Jacobs Media partnered to produce DASH, which brought nearly 300 people from 15 different industries together in Detroit on October 23-24 to learn, share, discuss, and collaborate about connected audiotainment. The goal of DASH was to build a new foundation for further discovery and the identification of mutually beneficial opportunities and synergies, particularly between the broadcast radio and automotive communities.

The two days of discussions at DASH provided a snapshot of today's thinking about the audiotainment opportunities ahead and how we might work together to realize them. The conversation clearly reflected the need to focus on the consumer, making media available, discoverable, and easy to use in-vehicle in ways that are consistent with what consumers are doing in other areas of their lives. Today's connected audiotainment platforms also open up a variety of opportunities to strengthen relationships with advertisers and dealers, and to build non-traditional partnerships to serve new consumer needs. There are certainly challenges ahead, but the door to collaboration is wide open.

This document summarizes the key takeaways from DASH, including highlights from the Panel discussions, the three Audience Roundtables, and the many thoughts that were generously contributed after the event. This document also includes a set of recommendations for next steps which may be useful as we partner in building the next generation of outstanding connected audiotainment.

We are interested in your feedback about DASH and these takeaways. Please contact us and our companies for more information about the conference, the connected car space, partnerships, and speaking and consulting opportunities.

Panel Highlights

Over 40 speakers covered a broad range of topics, with a primary focus on today's marketplace and tomorrow's opportunities:

Audiotainment Today

1. **Consumers want connectivity.** Julius Marchwicki of Ford kicked off the DASH conversation with a review of mobile's recent exponential growth, which has fueled a sea change in consumer tastes, demands, and usage patterns. He noted: "It's not about the vehicles. It's about the two billion smartphones in the market today." Similarly, JD Powers reported that 75% of users believe the phone is an important in-car connection device. Automakers are very aware of this

change, and they are investing millions to design systems which fulfill those needs. Larry Rosin's customer videos showed how positively consumers are responding to new connected infotainment options despite initial challenges in learning to use them. But the bottom line, as addressed by both broadcasters and the automotive representatives, is that consumers are now in charge and the mission is to determine their tastes, needs, and desires, and then give them what they want in a safe environment.

2. **The in-vehicle platform has changed.** GM's Greg Ross noted: "Sixteen million cars will be sold in the U.S. this year and all will be 'connected.'" The old model of two knobs, 12 presets, and a CD player is being rapidly replaced by an explosion of audio sources, channels, and options. As ESPN's Blair Cullen half joked, "The car is the most expensive iPhone accessory ever built."
3. **Brand differentiation is a central theme.** Whether it is embedded modems or smartphone connectivity, there are as many different philosophies about engineering and design as there are OEMs. There is nothing close to an industry standard, and there won't be one for the foreseeable future.
4. **Car dealers are crucial consumer guides.** Dealers are on the front lines, supporting customers trying to master new connected car systems. One of the auto dealers featured at DASH, John Taylor, noted: "We are constantly having to stay on top of the technology and learn to quickly deliver cars to our customers."
5. **The business model has changed.** Advertisers are experimenting with new models that emphasize ROI and more metrics-based tracking. Car dealerships, for example, challenge radio to provide data, proof of performance, and a reason why traditional advertising still has a place in their strategies. Similarly, major ad agencies are re-evaluating their approaches. Scott Brown from Mindshare explained, "We are moving from delivering messaging to delivering experiences." Fred Sattler of Initiative+ suggested that we think about the car "as a one-ton cookie – there's a wealth of data that can be collected."

Audiotainment Tomorrow

Conversation about new offerings for consumers laid out a series of fundamental questions centered on attracting consumers and ensuring that they have a great user experience:

1. **What is radio?** Based on discussions at DASH, it's clear that the definition of "radio" has evolved into a broad term that signifies audio information and entertainment. Alan Cross reminded us in a post-DASH blog: "The definition of 'radio' seems to be something that you touch and audio starts to play." Triton's Patrick Reynolds opined that "the future will be won by folks who view themselves as publishers – not stations."
2. **Do they want it?** As Panasonic's Hakan Kostepen pointed out, "The Millennials see things differently and we must tap into their tastes to bring effective products to market."
3. **Can they use it?** The automakers are on a mission to simplify their systems, recognizing that first generation technology has had its share of speed bumps. Larry Rosin's videos of consumers using connected car technology vividly depicted these struggles, but many car owners displayed great patience with learning the new systems.


4. **Can they find what they want?** Accessing a specific type of audiotainment in a new system can be a challenge. Menus vary by vehicle make and model, as do features like pre-sets. Once the consumer has mastered the basics, they then need to find specific content, from stations to songs. This too varies by system. iBiquity's Bob Struble reminded attendees that "to get a consistent user experience, we need to have a way to present a more uniform platform."

Roundtable Read-Out

Three special Audience Roundtable sessions comprised of groups representing all of the industries allowed DASH attendees to collaborate in unique ways. We posed key questions around connected audiotainment: What do our customers want next? How do we partner to deliver it? And how do we monetize our opportunities? We have put the keywords generated by our roundtables in bold and highlighted them in the boxes below.

What do our customers want next?

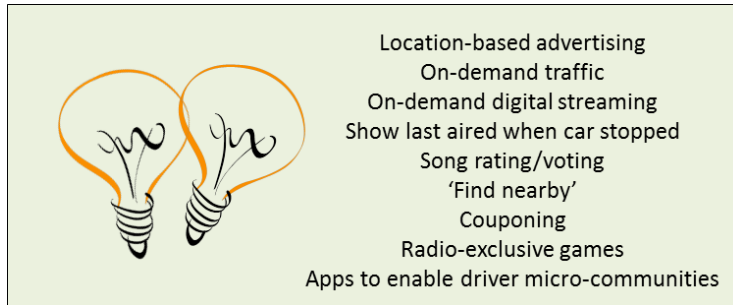
Simply put, they want to do **anything, anywhere**. Roundtable participants generated a long list of different media that consumers currently use in the car, and consistently noted that in-vehicle media usage is highly **personalized**. Millennials in particular will use **multiple tools** to access what they want.

Bluetooth, CD, “connected mobile device”, DVD, HD radio iPad, iPod, phone with audio over-ride navigation system, SIRI, SiriusXM, USB		cloud streaming, games, iBooks, internet, local station streaming, maps, “mobile office”, on-demand streaming, local radio (all formats), OpenTable, phone calls, podcasts, Shazam, Spotify, social media, stored playlists, texting, traffic, UConnect, video
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At the same time, many of the Roundtables noted that the current in-vehicle solutions come with a steep learning curve and registered surprise at the level of **patience** consumers displayed with those challenges. One other key item captured by the Roundtables: while consumers are clearly very excited about their new systems, **music is not their first focus** in-car. Information related to the driving task (like traffic) remains a top priority.

So what opportunities to better serve customers emerged from the discussion? Many attendees noted that it was critical to **think beyond radio and beyond the car**, to deliver content to consumers in all aspects of their lives. One Roundtable explored the possibilities as the consumer moves from car to home, from phone to car and from digital to broadcast. Another thought about the ‘car ecosystem’ – considering drivers, passengers, and car-related activities like tail-gate parties.

The opportunity to **personalize interactions** with the consumer also drew a lot of interest. From geo-targeting ads and services, to activating steering wheel buttons to allow consumers to respond to what they hear, quite a few Roundtables thought about the possibilities generated by **closed loop platforms** like NextRadio. Similarly, **time-shifting** was raised quite a few times, as attendees thought about ways to deliver content at exactly the right time and place. In general, it was clearly recognized that there were a lot of opportunities to **improve the customer experience** with in-vehicle audiotainment.



All of these opportunities were not without **challenges**, however. The multiplicity of in-vehicle platforms, the lack of standards in many areas, and the possibility of regulation were noted by many Roundtables as issues. Consumer education was also recognized as a top challenge, with many expressing the concern that radio content remains **discoverable** in the midst of all of the new media options now available. Smaller radio groups also expressed concern over how they will stay competitive in the new environment.

How do we monetize our opportunities?

Not surprisingly, advertising led the lists when the Roundtables considered monetization. Many Roundtables led off their comments with the simple phrase: **“data, data, data,”** noting that new car platforms provide a wealth of opportunities to learn more about and better serve consumers. The ability to gather more consumer metrics to enable **highly targeted advertising** generated a lot of discussion, especially in the context of low customer tolerance for generic ads. A number of Roundtables considered **geo-centric** and **hyperlocal advertising**, which might address consumers within a certain radius of a given business, or provide better information about the location of a business. Similarly, the idea of **increasing ad relevance** by building on improved consumer context and preference data was also a hot topic.


Beyond advertising, the Roundtables also mentioned **revenue-sharing** options. The new in-vehicle platforms also got a number of attendees thinking about possible **channel customization** for particular brands, advertisers and customer niche groups.

How do we partner to deliver them?

Attendees saw partnership opportunities everywhere, listing everyone from auto manufacturers to consumers as potential allies. Several tables simply said **“everyone” was a possible partner**, emphasizing that it was time to look well beyond traditional relationships.

Quite a few groups brainstormed specific partnership opportunities. Top among them was a focus on **educating the consumer**, often in conjunction with auto dealerships. One group suggested a joint effort by the NAB, RAB and local dealer associations to develop audio and video materials for both staff and consumer training. Others considered “learning events” at local dealerships driven by local air talent.

Consumer research was also a nexus for partnering. Attendees noted that everyone in the connected audiotainment ecosystem, from auto dealers to advertisers, was looking to learn more about consumer behaviors and needs. Many groups spent their time coming up with specific areas for research as well.

<ul style="list-style-type: none"> Driver and passenger behavior Driving vs stationary behaviors Use of in-car technology to do things outside car Car interaction with overall life activities Greatest driver distractions Preferred user interfaces Impact of voice interaction on distraction Overall technology usage 		<ul style="list-style-type: none"> Teachable user interfaces Willingness to pay and priorities What data is most useful to advertisers How do we generate a seamless user experience Expectations of various media re: ad and chat loads What happens when novelty wears off?
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One concept was universally recognized: there is a need for further conversation as we all move forward. The Roundtables provided a variety of suggestions on how this might happen, with some calling for the radio industry to develop a **shared vision** of what in-dash radio should look like going forward, and others recommending the establishment of a **working group** and more **cross-industry efforts** similar to the DASH discussions.

General Recommendations

Based on the discussions at and around DASH, we offer the following ideas as the basis for more thought, discussion, and action for all of the industries represented at DASH:

1. **Consider the Consumer.** It's time to take a look at how we can best leverage the different consumer data sets available in different parts of the audiotainment ecosystem. Combining information from in-car and cloud-based platforms with audience tracking solutions and other emerging tools will provide critical insights which will launch tomorrow's offerings.
2. **Review your Brand.** Connected audiotainment providers of all types now have an opportunity to re-imagine how their brands compete in the increasingly large and inter-connected audiotainment ecosystem. For example, broadcast radio brands must go beyond in-market competitive ratings and revenue battles to consider how they compete in this space. Platform providers and advertisers can now explore a new array of customized interactions and channels which can help build their brands.
3. **Review your Metrics.** From ad agencies to car dealers to automotive OEMs, speaking the same metrics language is essential. For example, in the automotive and agency worlds, rankers and cume reach take a backseat to personalization, accountability, and tracking – all elements that are part of new data sets that move the needle.
4. **Review your Customer's Value Proposition.** Everyone's business is changing right now, and it's time for us all to do a lot more listening. What's driving your customers' revenue streams today and how can you help?
5. **Focus on the Platform.** Now is a good time to have a conversation about tomorrow's in-vehicle platforms. For example, how can we best leverage a suite of connectivity options which will provide access to all of the content, all of the time? How can we best make content from both local and national providers accessible, searchable, and discoverable? How can technology best support the combination of free, subscription, crowd-sourced, and advertising-based business models that drive the greatest value?

6. **Stay Curious.** As Buzz Knight of Greater Media recently wrote: “...all of us today must maintain our very high level of curiosity about the future of technology, and the present and future for the connected car.” Following the conference, MP3Radio founder Michael Robertson announced new technology to search all the radio stations in the world for songs playing “Katy Perry” or even specific subjects. Sirius just finalized its acquisition of Agero’s telematics unit. It is important to constantly evaluate new solutions for their potential value to your business.

For Radio:

1. **Experience it.** Relatively few traditional radio managers have driven and experienced connected car technology. It is essential that every station employee – from the DJs to CEOs – drive, rent, or purchase vehicles that provide these new experiences to consumers.
2. **Help your listeners find you.** Remember that your station may not be easy to locate in a new connected system. Find out what the best search terms are and help your listeners learn how to use them. Partner with your local dealers to help educate consumers. Think about how to make your content easy to discover and manipulate.
3. **Create a consortium.** Radio is a splintered business with no central leadership, making it difficult to align interests across a broad spectrum of stakeholders. However, it is essential the industry get serious about representing its joint interests and partnership opportunities to the automotive industry.
4. **Open an office in Detroit.** Entities and brands with a stake in the “connected car” ecosystem, from Pandora to Google to Aha to iBiquity, have a presence in the Motor City. Access, networking, expertise, and partnerships can only come out of proximity to the key automotive decision-makers.
5. **Get to work.** Radio is not going to swoop in, quote impressive national usage figures and win big in the automotive infotainment sweepstakes of today or the future. It is going to require research, investment, dedication, relationships, an open mind, and a long view.
6. **Live & Local matter.** This was a key topic throughout DASH, and not just among the broadcasters. The car companies value radio’s ability to provide real-time information, and as Initiative + Fred Sattler stated, “Radio is local, local, local, newspapers are dying. TV’s not picking up the mantle, and Pandora can’t do it.”
7. **Understand changing advertiser value propositions.** In both the agency and dealer sessions it was clear that success is being redefined. Whether it’s collaborating with dealers on programs that help address the challenges that have arisen from consumer training, or new metrics models that are emerging, it’s imperative that the radio sales process be re-evaluated. This is an area where the RAB can take a leadership role in re-educating the industry to do less pitching and a lot more listening, and helping the industry provide metrics-based solutions that are in-line with their needs and changing demands.
8. **Start now.** The automakers have a development process that takes between 3-6 years. Change doesn’t happen quickly, but radio needs to get to the starting line. It is going to require research, investment, dedication, relationship-building, an open mind, and a long view. The time to start is now.

About the Organizers



Radio Ink, which was founded over two decades ago, is a leading radio industry management publication, published in print and digital along with daily radio industry news headlines. Its most well known issue is its annual "40 Most Powerful People in Radio" issue, which documents the annual state of the industry. *Radio Ink* produces multiple conferences including Forecast at the Harvard Club in New York, Convergence in Silicon Valley, plus the Sports Radio and Hispanic Radio Conferences. Rhoads is actively involved in working with companies seeking connectivity in the radio industry and online radio brands seeking a bridge to radio consumers.



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Jacobs Media is a leading consulting and research company, specializing in the intersection of media, mobile, social media, and digital. For thirty years, the company has provided leadership and vision to the commercial and public radio industries through the development of the Classic Rock radio format, creation of ten Techsurveys that provide the digital and social media road map, and as a leader in the development of mobile and automotive strategies. jacAPPS, the company's mobile division, has created over 800 mobile apps and is currently the House Developer for the Ford Motor Company.



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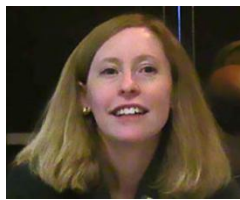
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Organizer Perspectives

This section includes articles written by two of the DASH Organizers: Fred Jacobs of Jacobs Media and Eric Rhoads of *Radio Ink*.

DASH Takeaways

October 28, 2013

By Fred Jacobs

I have to tell you that of all the things I've been involved with in my professional life, especially since forming Jacobs Media 30 years ago, DASH ranks right up there. We hit a "responsive chord" (as Tony Schwartz called it) as evidenced by the nearly 300 engaged professionals who showed up in Detroit last week.

Representing companies as diverse as Ford, General Motors, Toyota, Chrysler, Panasonic, Pioneer, Mindshare, Initiative +, Nielsen, ESPN, NPR, Pandora, Slacker, Stitcher, iHeartRadio, TuneIn, Aha, and of course, leaders and managers from dozens of radio companies (who are now a few steps ahead of the game), I can tell you there was a lot of IQ and brain power in that room, constructively discussing today's challenges and tomorrow's possibilities.



(Above, WWJ/Detroit's Jeff Gilbert, GM's Greg Ross, Pioneer's Ted Cardenas, Panasonic's Hakan Kostepen, and Toyota's Wayne Powell.)

DASH wasn't just a conference about new technology. Attendees heard some common themes from the auto experts that apply very much to radio's challenges: differentiation, innovation, listening to consumers, and building a great experience. Believe me when I tell you that every radio person in that room was taking notes.

They weren't chasing a myth or the next bright shiny object. For both automotive and radio broadcasting, it doesn't get any more real than the "connected car."

There have already been some thoughtful reviews and analyses written about DASH. Eric Rhoads – our partner for the conference – put together a great post and you can access it [here](#).

And Canadian journalist, music geek, and analyst Alan Cross was also in the house, and wrote a thoughtful, smart and savvy Top 10 list of his own. Read it [here](#).

I have my own set of takeaways as the resident Detroitier on the DASH partner team, so here're my key takeaways from the conference:

1. **The next big thing is your dashboard** – Consumers are excited by these systems, and they're driving dealership traffic. Larry Rosin presented videotaped interviews with owners of "connected cars" and you could clearly see the impact these systems are having on content choices. They need to be simpler and more intuitive, but the reality is that they're here. New car sales in the U.S. will easily top the 15 million mark this year, and according to GM's Greg Ross and Toyota's Wayne Powell – both of whom participated in a key DASH panel – most of those vehicles will be "connected" in some way. As one panelist humorously noted, the new dashboard is "the most expensive iPhone accessory ever built."
2. **What's the difference?** – The automakers are working hard to create and refine their systems – and there is no standard. For the foreseeable future, it's every OEM for themselves, and that doesn't count companies like Pioneer and Panasonic, both of whom were represented at DASH. And that urge to be different and compelling needs to permeate over to the content creation side of the street. What's different and unique about your brand, and why should "connected car" owners take the trouble to find your content?
3. **Personality matters** – Our local Detroit DJ panel made a compelling – and entertaining – case for the power of "live and local." But they also urged the broadcasters in the room to take risks and try new things. Great advice from the air studio, and something that every broadcaster should hear loud and clear. We have said this many times in this blog, but broadcast radio is no longer just going at it with in-market stations for ratings – the larger competitive landscape now covers an almost infinite array of choice. Defining the "why" of your station brand is at the heart of the challenge.
4. **What's new?** – From the automotive companies to digital channels, everyone's working hard to create new and different offerings to charm and captivate consumers. As Larry Rosin noted about the new dashboards, they offer "a barrage of new." This is an area where radio lags behind. Familiar, dependable, and consistent radio brands have their value, but in this environment, broadcasters need to address the question of "what's new?" and get serious about innovation, R&D, and investment.
5. **It's not easy** – A number of DASH sessions made the point that getting your content in the dashboard is no simple task. Our very last session featured Ford's Scott Burnell interviewing NPR's Sarah Lumbard and iHeartRadio's Brian Lakamp. They thoughtfully addressed the high degree of difficulty of approaching OEMs with cogent, compelling proposals of partnership. Both Lumbard and Lakamp were articulate and passionate in their descriptions of this arduous task. Broadcast radio is not simply going to swoop into this space, talk about how great it is, and create new partnerships. It requires a lot of work.
6. **The Gen Y conundrum** – Several of the auto executives at DASH acknowledged the challenge they face with Millennials, some of whom are putting off buying vehicles in favor of public transportation. Panasonic's Hakan Kostepen noted that no company has the ability to change a generational mindset. But there is also confidence the automakers are working hard to research and create products that will appeal to Millennials. And let's get real about the numbers: while more than half of New York City residents take mass transit to work every day, only one in ten Los Angelinos takes a subway or bus to work. And in metros like Cleveland, Cincinnati, Milwaukee, New Orleans, and Miami, it's less than that. Maybe some Gen Yers would *like* to ride a bus to work, but in most markets in the U.S., it's not possible or desirable. On the radio side of the street, a more proactive, realistic approach to understanding and targeting

Millennials would be smart. In this case, radio's leaders could benefit from the approach the automakers are taking in addressing this challenge head on.

7. **Sales challenges** – One key aspect of DASH was showcasing car dealers who are the true contact points with consumers and their “connected cars.” As we saw, their sales and marketing priorities have changed, and radio may have missed a memo or two. While some are focusing on that dealer from Grand Ledge who has totally moved away from radio as an advertising vehicle, they may be missing the larger point – this is a time for the radio industry to decide to go all-in on the “connected car” and to redefine its relationships with OEMs and the people on the front lines selling and servicing cars – the dealers. Radio sellers need to take a step back and actually listen to what moves the needle at dealerships, and then determine how they can uniquely meet those needs.
8. **Intersection spawns innovation** – Dozens of leaders from the automotive industry came to **DASH** for one reason – they are interested in the radio business. They wanted to see first-hand what radio is thinking and creating because they simply don't know us. Valerie Shuman's roundtables introduced attendees to the concept of collaboration. I think most of them would tell you they enjoyed hanging out with professionals from different industries. So now what? Will radio go back to business as usual or are we going to commit to working together as two storied industries with a deep history? Are we going to take the business cards that were exchanged at DASH, pick up the phone, and start the process? Is the radio industry serious about engaging with automakers once this conference's glow begins to fade? And that leads us to...
9. **A consortium?** – It was first floated at the Arbitron sponsored “Radio & The Connected Car” session at The Radio Show in Orlando last month, featuring Strategy Analytics' Roger Lanctot (a big presence at DASH) and me. Greater Media's Peter Smyth suggested it at DASH. But it will require more than the formation of a group and a logo, as evidenced by the HD Radio Alliance's checkered path. We frankly needed more participation at DASH from the heads of radio companies, and if a consortium is to be successful, it will require more than lip service. Radio broadcasting CEOs need to show up, invest, and make this a priority. Otherwise, the results are predictable, leading to yet another missed opportunity.
10. **Take a drive** – It is stunning to realize how few radio broadcasters own or have ever driven a “connected car,” experiencing precisely what consumers are seeing, thinking, and feeling when they get behind the wheel of a vehicle equipped with SYNC, Entune, CUE, or UConnect. Before the end of 2013, I strongly advise you to buy, lease, rent, or test drive a “connected car” and see for yourself just how this technology is rocking our world.
11. **You need to be there** – Will there be another DASH? We'll see. If you're just reading various summaries from DASH (like this one) or tweets from #DASHAudio, I can tell you that being in that room was an entirely different experience. We hope our efforts in the “connected car” space stimulate radio broadcasters to show up for events like the Consumer Electronics Show and automotive conferences. As we have pointed out the past, they are typically devoid of radio executives, and that's a missed opportunity.

On the first day of DASH, Toyota's Wayne Powell said it best when thinking about how the automobile industry succeeds:

“Our business is all about partnerships. We are a car company. We are not necessarily experts in media or the internet. We have to have good partners.”

The time is now for radio to step up and answer the bell. Thanks to those of you who supported DASH.

How Detroit Opened Our Eyes

By Eric Rhoads

Two years ago, at our Convergence conference, radio heard the term "connected car" for the first time on one of our panels. Our connected car discussion last June led me to write an impassioned editorial about the possibility of the dashboard's being without AM or FM in the future. Of course, radio's competitors spread that editorial to every advertiser in America, and the issue suddenly became top-of-mind.

I want nothing more than to see our industry succeed in the future, so I decided something more had to happen to assure radio's solid presence in the automotive dashboard. And that process would involve a dialogue between the automotive and radio industries. I also knew all the players needed to be present, including advertisers, OEMs, and online radio companies.

That event, the DASH conference, took place earlier this week in Detroit, thanks to the teams at *Radio Ink*, at Jacobs Media, and at Shuman Consulting Group, who partnered on the project. We also invited media partnerships with other industry associations and trade publications because we felt we needed everyone involved if this was to be a success.

Before the DASH conference, myself, Fred Jacobs, and Valerie Shuman arranged a private luncheon to begin the dialogue between radio and the automotive industry. We invited Greater Media CEO Peter Smyth and Entercom President/CEO David Field, as well as RAB President/CEO Erica Farber. We paired them together with representatives of three major automotive manufacturers: Julius Marchwicki, Ford Motor Co.'s Global Product Manager/SYNC AppLink; Wayne Powell, GM/SEE for Toyota Motor Engineering and Manufacturing, North America; and Greg Ross, Director of Product Strategy and Infotainment, Global Connected Consumer, General Motors.

After two days in a Detroit airport hotel, I'm here to report that the DASH conference was not only a huge success in attendance, it was a success in many other ways as well. Most importantly, it was a conversation among radio, Internet radio, advertisers, car dealers, OEMs, and the major automotive companies -- which were not only represented, they had people in attendance the whole time and embraced and welcomed the radio-industry interest in their strategies, were engaged in our dialogue, and listened with an open mind. One car manufacturer said onstage that this may be one of the most important events in history to keep consumers engaged with automobiles and the right audio strategy.

It wasn't all rosy, however. Radio also got a dose of reality about how the connected car is changing listening habits. Edison Research's Larry Rosin stunned the room with a video created for the conference that showed consumers using connected cars and being interviewed about how they listen to audio in the car. Though the sample was small, the information took everyone by surprise as formerly loyal radio consumers discussed how their habits had changed. It was very clear that technology and available alternatives can have an effect on listening behavior.

We saw dashboards that had multiple presets allowing listeners to go from Pandora to NPR to and iTunes account in the same way they use radio presets now. We heard one young woman say, "Poor FM. I don't listen to it anymore because I don't have to," as she described how she used to listen in her old car and how her new car has her spending time with other alternatives. Others on the video

explained how they use radio, and it was clear that the hands-free environment changes how they access radio. And the radio people in the audience saw clear evidence for how they need to talk to their audience to make sure their station ends up as one of the alternatives sought out in the connected car.

Rosin pointed out that these connected car drivers will listen to radio only when radio offers unique, compelling, live and local content they can't get anywhere else. One major advertiser, Fred Sattler, EVP/Managing Director for Initiative + in Los Angeles -- he controls advertising for Hyundai and Kia -- reinforced that radio won't hang on to advertisers unless it is offering live, local content. He said syndicated air personalities are not unique enough to the local town, the local dialogue, and the needs of the local community to interest him as an advertiser in a connected car environment. That means some radio companies today are moving away from radio's best remaining strength: unique local content.

It's impossible to summarize a two-day event here, but a good starter is checking the Twitter hashtag #DASHAudio. Frankly, those not in the room who sent representatives to report back will get bullet points, but may well miss the essence of what those who were there received. I suspect every radio person who attended is already changing things about their strategy as a result of lessons learned at DASH.

And some of those lessons were hard to swallow. For instance, a panel of local car dealers who were previously giant radio spenders revealed why, in a couple of cases, radio has fallen off their radar and budgets have been shifted elsewhere. Jaws in the room dropped when we learned that part of the migration away from radio could have been prevented. More jaws dropped when dealers discussed radio's lack of data and proof of performance compared to Pandora.

We saw staggering stats about mobile adoption and about connected car adoption and learned that virtually every car from 2015 forward will be a connected car. Most cars on dealers' lots today are connected, and that will clearly have an impact on consumer behavior and their use of audio.

Radio also learned how well embraced it is by most of the car companies, which can perceive radio's strengths and weaknesses but love radio's relationship with consumers. Most agreed they are committed to radio receivers for the near term -- but whether the dashboard will include radio over the long term will depend on how deeply the industry responds to automakers' needs, and to advertisers' need for data. Clearly the dialogue has begun and radio has a huge open door to participate in the dashboard's future. If we achieved nothing else, it was worth it to see this dialogue begin.

Radio's continued dominance in the car will depend on how each of us responds. It is absolutely critical to drive and experience connected cars and conduct in-market studies about how consumers are using the connected dashboard in your town. Though we assume listener loyalty is still there, we need to be open-minded in understanding how we respond to listener needs, especially since the average car on the road is now 11 years old and 2015 is expected to be the biggest year for auto sales in history. All those new cars are connected, and radio must reflect on how it approaches the in-car listener. We also need to ask: Are we even still radio? My guess is that a few dozen stations attending DASH will go home and start calling their stations "audio."

Furthermore, radio must seek improvements in technology to become searchable, and allow consumers to time-shift, rewind, and pause. These needs were revealed in consumer research and are based on

expectations for what the connected car offers in other audio sources. HD Radio may be the entry point to make these things happen.

Radio needs a presence in the car companies, in Detroit and in Silicon Valley. Much like Interep used to have an embedded radio person inside the major agencies, it may be time the industry embeds radio representatives inside Ford, GM, Toyota, and others. Pandora and TuneIn, Greater Media and Clear Channel have representatives in Detroit.

Most important, radio needs to be on its game. Suddenly you're not just competing with other stations -- the buttons on the dashboard lead to Pandora, Slacker, Spotify, iTunes Radio, and thousands of radio stations on TuneIn, Aha, and iHeart. Reinforcing your strength and brands in your market is more critical than ever because only loyalty and habit will overcome a variety of options. Being a jukebox with long stopsets won't compete with services offering music and few or no commercials. Your advantage needs to come from the strength of your talent and your links to your community.

Eyes were opened at DASH, and I leave Detroit encouraged for our industry. But our success is far from cemented. There is much to be done, and you'll be seeing much more connected car content in *Radio Ink*. Please make a point to get connected to this technology and talk to listeners using it. Your eyes will be opened too.