Public Radio & The Connected Car
APPROVED APP DEVELOPMENT HOUSE
“Highway HiFi”
Heavy In-Car Radio Listening

100% of the time + most of the time

- Total: 40%
- AAA: 46%
- Classical: 38%
- News/Talk: 40%
- Men: 40%
- Women: 40%
- Gen Y: 61%
- Gen X: 50%
- Boomers: 37%
- Silent: 27%

100% of the time + most of the time
Connected Car Ownership

<table>
<thead>
<tr>
<th>Own Connected Car</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>13%</td>
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<td>News/Talk</td>
<td>13%</td>
</tr>
<tr>
<td>Men</td>
<td>15%</td>
</tr>
<tr>
<td>Women</td>
<td>11%</td>
</tr>
<tr>
<td>Gen Y</td>
<td>9%</td>
</tr>
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</tbody>
</table>

Yes: 13%
No: 87%
Impact On AM/FM Listening From Having A Connected Car

Among in-car media system owners

- Listening less: 29%
- As much as usual – not a lot: 14%
- As much as usual – a lot: 53%
- Listening more: 5%
In Car Audio

Percentage of time spent in a car with each source

- AM/FM: 66%
- Satellite: 10%
- Your Music: 10%
- Pandora: 3%
- Podcasts: 2%
- Other streaming: 1%
- Phone: 3%
- Audio books: 3%
- Other: 2%

Total
Percentage of time spent in a car with each source

- AM/FM: 60%
- Your Music: 14%
- Pandora: 6%
- Podcasts: 3%
- Satellite: 7%
- Other streaming: 5%
- Audio books: 2%
- Phone: 3%
- Other: 1%
The Connected Car

Features:
- Apps
- Bing
- iHeartRadio
- MovieTickets.com
- OpenTable
- Pandora
- Saved Destinations

Additional Features:
- Radio
- Media
- Seek
- Track
- Temperature
- Security
- Passenger
- Dual Control

Brands:
- JBL
- GreenEdge
Rarely/Never Change Audio Settings

77%

Total
Men
Women
Gen Y
Gen X
Boomers
Silent
Own Connected Car

73%
PANDORA

YOUR CAR. YOUR MUSIC.

INTEGRATED APP
Integrated app in over 160 vehicle models, providing the best possible in-car listening experience.

FULL CONTROL
Use the integrated app to navigate Pandora with voice or steering wheel controls (in select models).

SIMPLE
Start with the name of your favorite artist, song, or genre and Pandora will do the rest. Plus, explore more than 700 genre stations that were created by Pandora’s musicologists. Name your stations by giving them your own names!
Global Demand For In-Car Technology Vs. Car's Driving Performance

Q: “What has more influence over your car purchasing decision?”

Source: Accenture Connected Vehicle Survey, 2014
Connected Car Ratings

Among those with an in-car media system

- Love it: 48%
- Like it: 28%
- Confusing: 9%
- Fair: 6%
- Avoid it: 5%
- Other: 5%

I love it and use it all the time
I like it but it could be better
It's just fair - there are problems
It's confusing and I don't use it as much as I could
I avoid using it
Other
Most Important New Car Features

“Very Important” features among the 10% of respondents planning on buying/leasing a new vehicle in next 12 months

- **AM/FM radio**: 89%
- **Smartphone/iPod connector (AUX IN)**: 60%
- **Bluetooth**: 53%
- **CD player**: 37%
- **GPS**: 35%
- **Wireless internet connection**: 17%
- **Satellite radio**: 13%
- **HD Radio**: 12%
- **Media system (Ford SYNC, etc.)**: 11%
- **DVD player**: 7%
- **Hard drive for media storage**: 4%
...but they want other options, too
Apple CarPlay & Android Auto
25+ Connected Solutions
The Road Ahead
Action Steps

Drive a “connected car”
Action Steps

Attend a “connected car” conference
Action Steps

Embrace the importance of data for revenue generation
Action Steps

Develop a mobile/in-car strategy for your station

1. Develop a mobile app
2. Make it available on all vehicles
3. Create partnerships with local car dealers
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