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2021 Car Buyers Survey



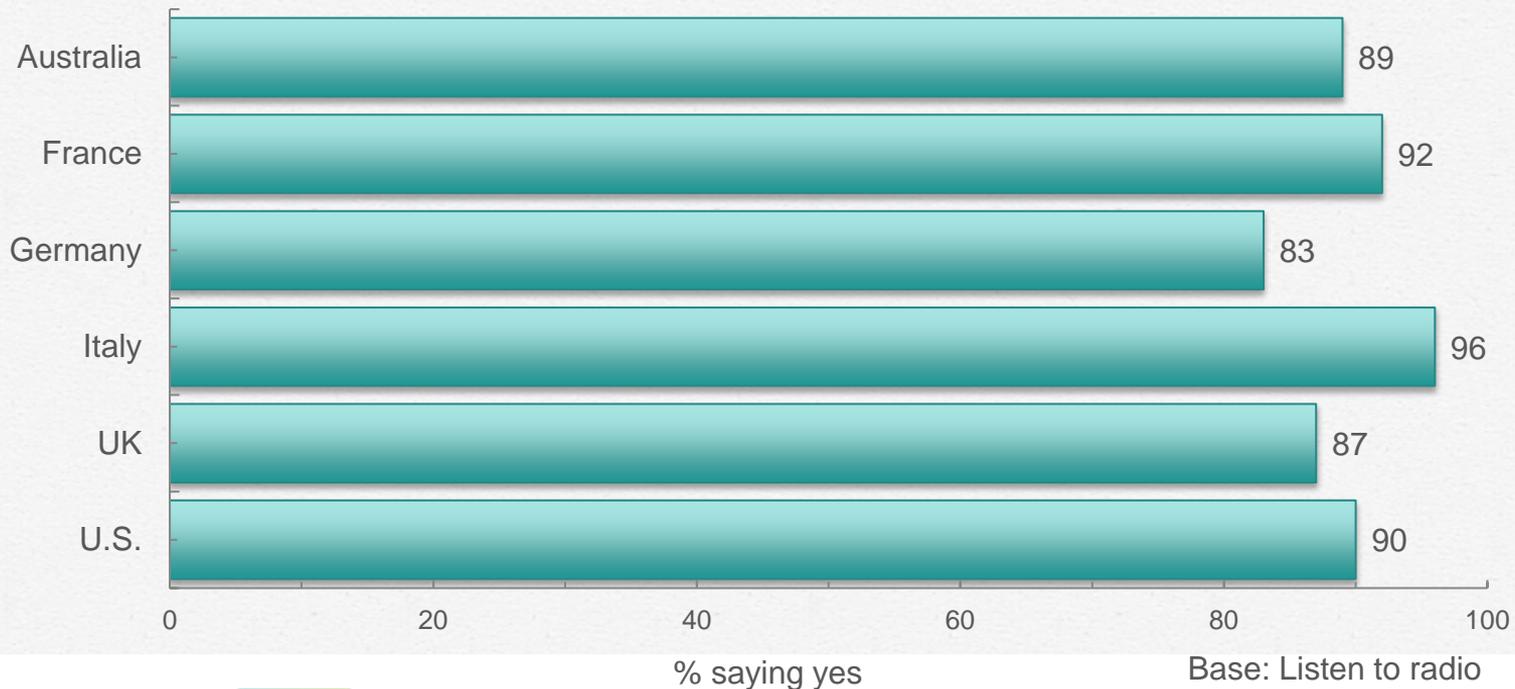
Survey Methodology:

- Online interviews conducted in six countries:
 - 1,044 interviews in Australia
 - 1,033 interviews in France
 - 1,023 interviews in Germany
 - 1,028 interviews in Italy
 - 1,100 interviews in the UK
 - 1,060 interviews in the U.S.
 - Adults age 18+
 - Interviews conducted 1 September – 21 September, 2021
 - In order to qualify, all respondents must:
 - Have been involved in the purchase/lease of a 2018 or newer vehicle within the last two years
- OR**
- Be involved in the purchase/lease of a 2018 or newer vehicle within the next 12 months

How often do you typically listen to radio?

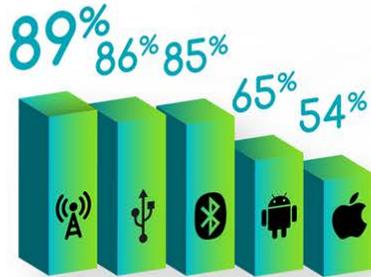


Do you typically listen to the radio in a car/vehicle?



CAR BUYERS SAY BROADCAST RADIO IS A MUST

Almost all in-car radio listeners say a broadcast radio tuner should be standard equipment in every car



When considering which car to purchase or lease, radio is the most important audio feature to have, ahead of USB ports, Bluetooth, Android Auto and Apple CarPlay

Prospective car buyers say they are less likely to buy or lease a car that does not have a radio



How much do you agree with the following statements about listening to traditional “over-the-air” radio in a car/vehicle?

Statement (% “strongly” or “somewhat” agree)	Australia	France	Germany	Italy	UK	U.S.
Radio keeps you company in the car/vehicle	91%	92%	90%	94%	92%	91%
You would miss your favorite radio stations if you couldn’t receive them in your car/vehicle	89%	89%	91%	90%	86%	87%
Radio should be standard in every car/vehicle	90%	90%	91%	93%	89%	89%
You would really miss having radio in a car/vehicle	87%	88%	89%	91%	87%	89%
You rarely experience gaps in audio when listening to radio in a car/vehicle	87%	83%	90%	84%	90%	85%
You listen to radio in a car/vehicle because it’s free	91%	83%	80%	84%	88%	89%
It is easier to listen to radio in a car/vehicle than to listen to other types of audio sources	87%	83%	87%	88%	85%	85%
Radio provides a better listening experience in the car than other types of audio sources	81%	78%	77%	84%	83%	78%
You listen to radio in a car/vehicle because it doesn’t use up your mobile data plan	76%	77%	76%	73%	75%	71%
Radio in the car/vehicle often feels outdated	49%	44%	46%	44%	51%	56%



Base: Typically listen to radio in a car/vehicle

Prospective Car Buyers: Top audio sources wanted in car/vehicle

Audio source (% ranking audio source in top five)	Australia	France	Germany	Italy	UK	U.S.
Radio (AM/FM/DAB/DAB+)	64%	66%	65%	73%	64%	56%
Bluetooth connection	59%	52%	57%	53%	54%	44%
USB port	48%	53%	50%	54%	50%	39%
CD player	30%	29%	31%	35%	35%	23%
Android Auto	29%	25%	31%	33%	20%	19%
Online music services integrated directly into dashboard	27%	17%	28%	27%	30%	26%
Apple CarPlay	25%	16%	21%	14%	26%	20%
Auxiliary jack	17%	18%	19%	12%	21%	16%
SiriusXM Satellite Radio	N/A	N/A	N/A	N/A	N/A	34%

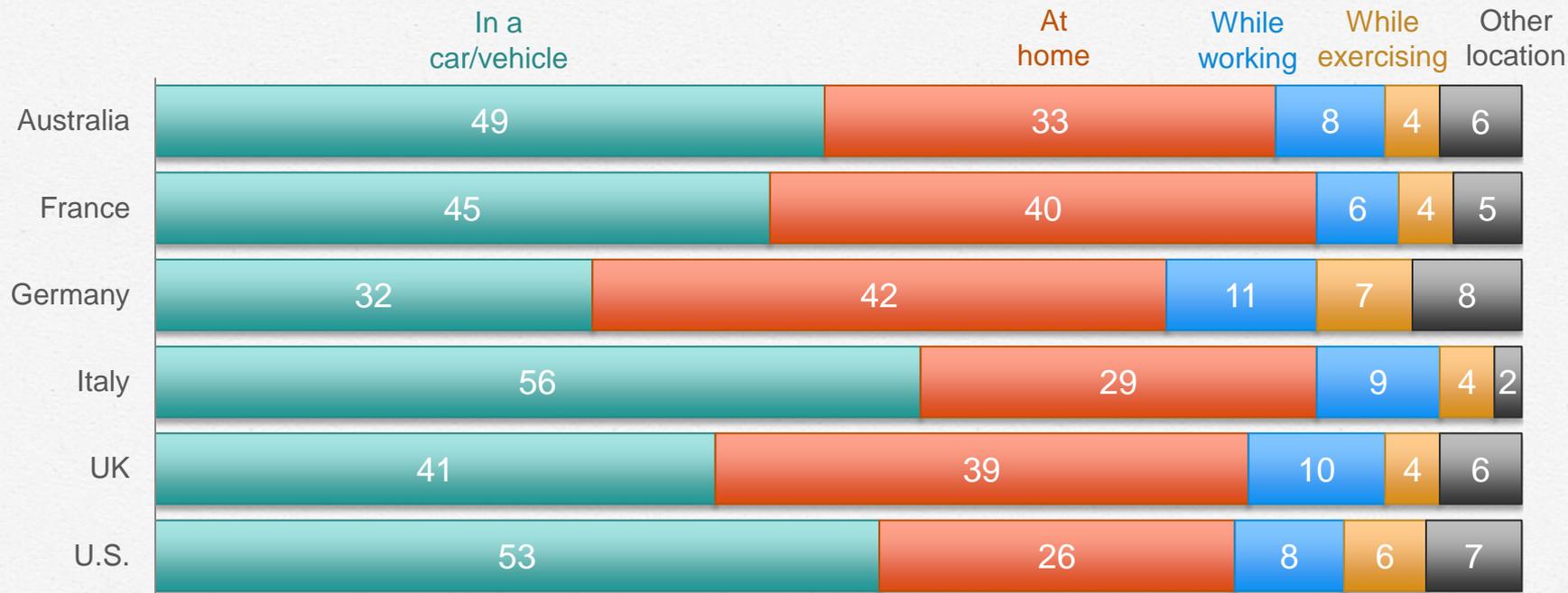
Prospective Car Buyers: Suppose the car/vehicle you are considering to purchase/lease does not have a radio. Are you...?

<i>% answering</i>	Australia	France	Germany	Italy	UK	U.S.
Much less likely to purchase/lease the vehicle	43%	44%	52%	44%	40%	52%
Somewhat less likely to purchase/lease vehicle	37%	40%	29%	41%	38%	29%
Would make no difference in decision	21%	16%	19%	15%	22%	19%

Recent Car Buyers: Suppose the car/vehicle recently purchased/leased did not have a radio. Would you have been...?

<i>% answering</i>	Australia	France	Germany	Italy	UK	U.S.
Much less likely to have purchased/leased the vehicle	41%	43%	47%	45%	41%	46%
Somewhat less likely to have purchased/leased the vehicle	34%	39%	32%	42%	36%	35%
Would have made no difference in decision	25%	19%	21%	13%	23%	19%

Where do you typically listen to radio most often?



Base: Listen to radio

Which do you typically listen to most often in a car/vehicle?

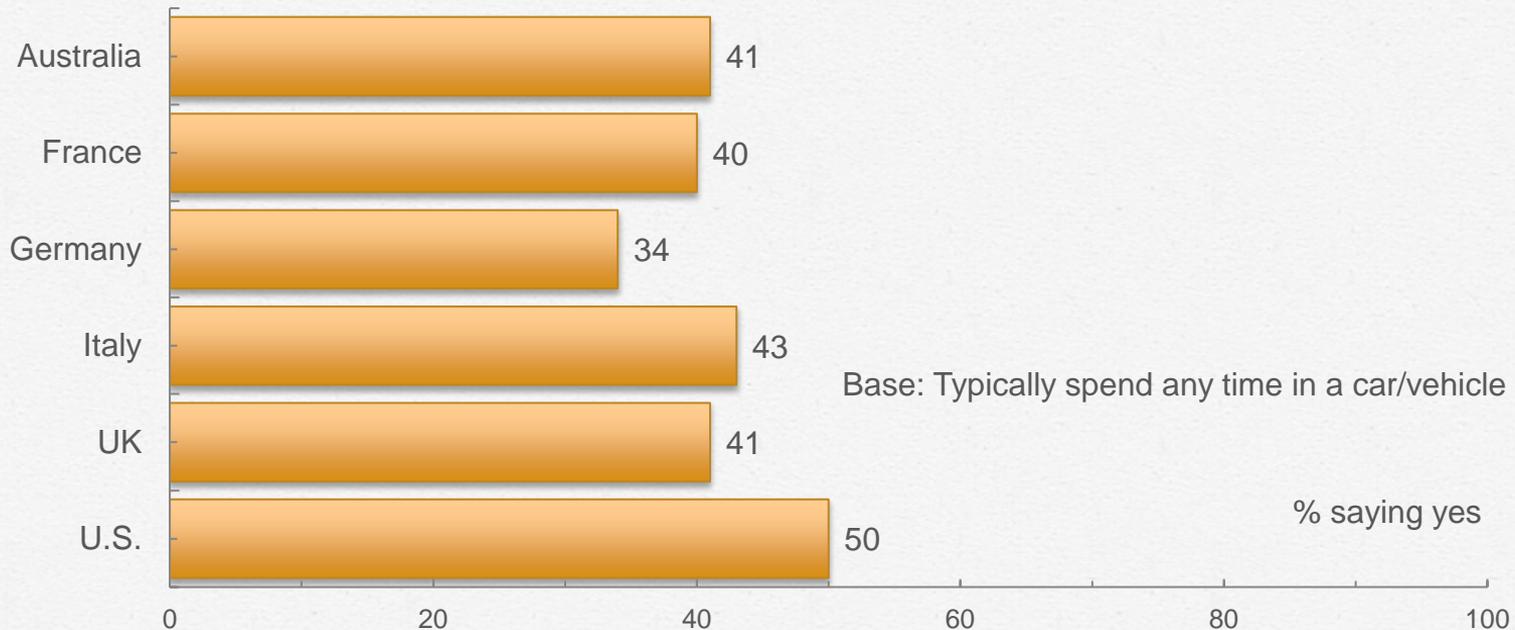


SiriusXM Satellite Radio



Base: Typically spend any time in a car/vehicle

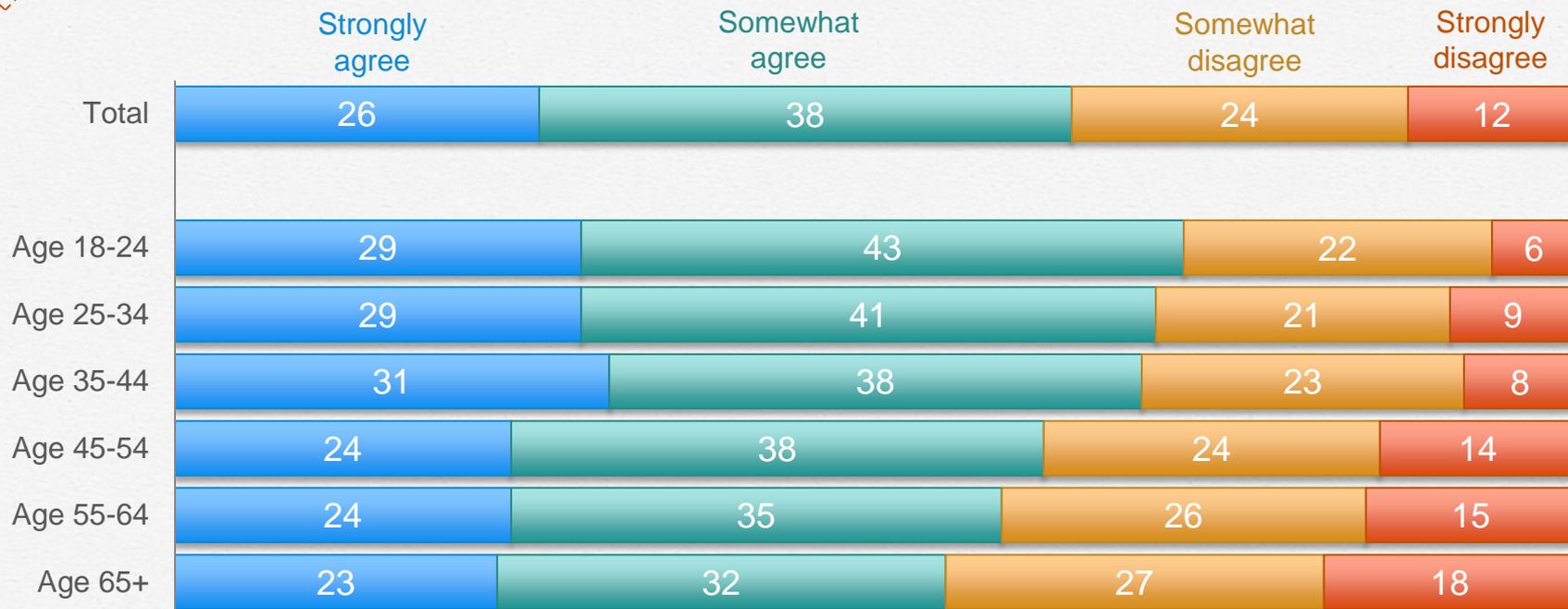
Do you typically listen to audio in a car/vehicle through your mobile device?



Radio Agree/Disagree:

Statement (% "strongly" or "somewhat agree)	Australia	France	Germany	Italy	UK	U.S.
You can do other things while listening to the radio	92%	92%	91%	94%	92%	91%
Radio helps you stay up to date with what's going on in the world	89%	88%	90%	91%	89%	83%
Radio is an important source of information in times of crisis	90%	87%	89%	89%	87%	87%
Radio keeps you company	86%	88%	81%	95%	88%	87%
Listening to the radio puts you in a good mood	86%	85%	87%	92%	88%	87%
Listening to the radio helps you relax	87%	88%	85%	92%	88%	85%
Radio has consistently good reception; it just works	87%	83%	87%	85%	89%	84%
Radio helps you discover what the popular songs are	83%	85%	83%	89%	84%	79%
Listening to the radio gives you good memories	83%	80%	81%	86%	84%	83%
Radio helps you stay connected with your local area	85%	86%	84%	80%	80%	83%
Radio has done a good job of staying fresh and relevant	85%	85%	87%	91%	87%	84%
Radio is consistently reliable	89%	78%	88%	86%	89%	85%
You would not listen to your favorite radio stations if you could only listen online	65%	62%	67%	58%	65%	65%

Agree/Disagree: You would not listen to your favorite radio stations if you could only listen online



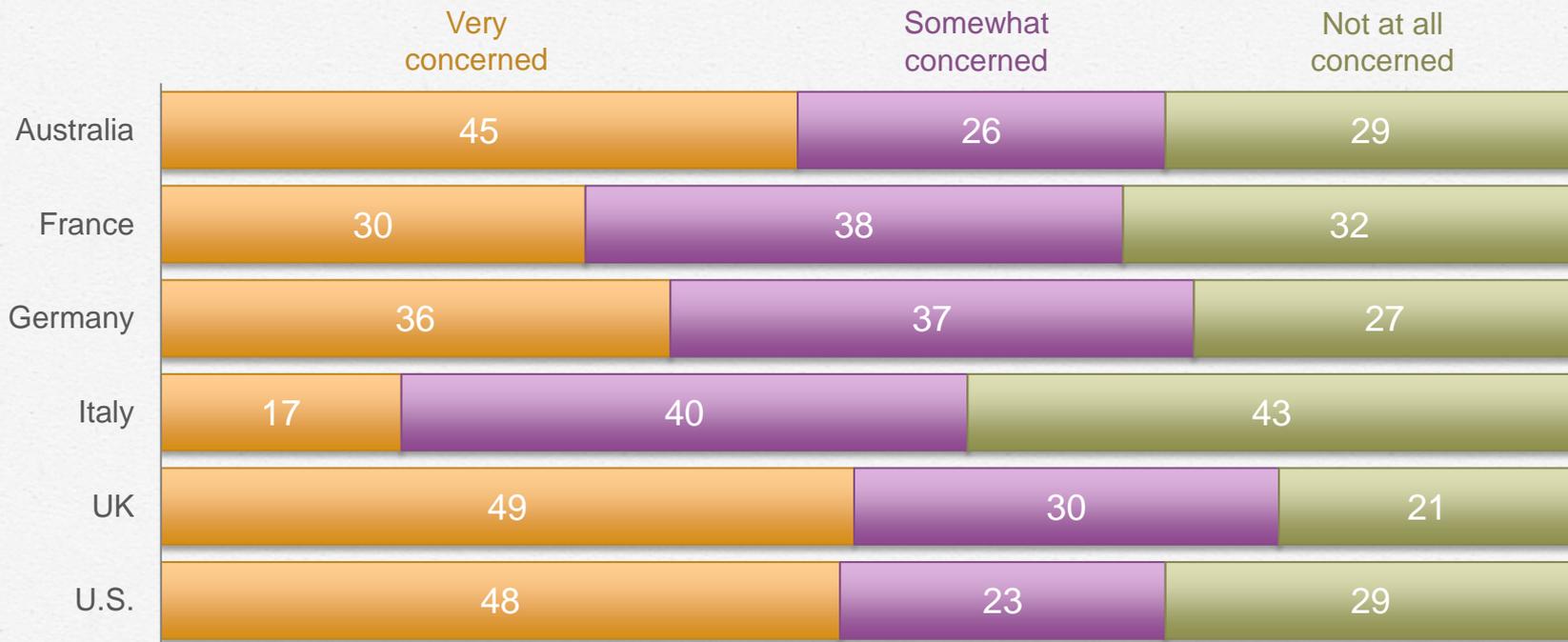
How much do you agree with the following statements about listening to traditional “over-the-air” radio in a car/vehicle?

Statement (% “strongly” or “somewhat” agree)	Australia	France	Germany	Italy	UK	U.S.
Radio keeps you company in the car/vehicle	91%	92%	90%	94%	92%	91%
You would miss your favorite radio stations if you couldn't receive them in your car/vehicle	89%	89%	91%	90%	86%	87%
Radio should be standard in every car/vehicle	90%	90%	91%	93%	89%	89%
You would really miss having radio in a car/vehicle	87%	88%	89%	91%	87%	89%
You rarely experience gaps in audio when listening to radio in a car/vehicle	87%	83%	90%	84%	90%	85%
You listen to radio in a car/vehicle because it's free	91%	83%	80%	84%	88%	89%
It is easier to listen to radio in a car/vehicle than to listen to other types of audio sources	87%	83%	87%	88%	85%	85%
Radio provides a better listening experience in the car than other types of audio sources	81%	78%	77%	84%	83%	78%
You listen to radio in a car/vehicle because it doesn't use up your mobile data plan	76%	77%	76%	73%	75%	71%
Radio in the car/vehicle often feels outdated	49%	44%	46%	44%	51%	56%

Base: Typically listen to radio in a car/vehicle



When listening to audio in a car/vehicle through your mobile device, how concerned are you about how much data you are using on your mobile device?



Base: Typically listen to audio in a car/vehicle through a mobile device

How much do you agree with the following statements about listening to traditional “over-the-air” radio in a car/vehicle?

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Base: Typically listen to radio in a car/vehicle

Car Brands “Very” Or “Likely” To Be Purchased

Australia

Make	% “very” or “somewhat” likely
Toyota	87%
Mazda	76%
Hyundai	72%
Mitsubishi	64%
Ford	62%

France

Make	% “very” or “somewhat” likely
Peugeot	76%
Renault	68%
Citroën	66%
Volkswagen	61%
Dacia	50%

Germany

Make	% “very” or “somewhat” likely
Volkswagen	67%
Audi	66%
BMW	63%
Mercedes	59%
Fiat	34%

Italy

Make	% “very” or “somewhat” likely
Fiat	68%
Ford	67%
Volkswagen	66%
Peugeot	64%
Renault	60%

UK

Make	% “very” or “somewhat” likely
Ford	72%
Volkswagen	68%
Audi	68%
BMW	62%
Mercedes	59%

U.S.

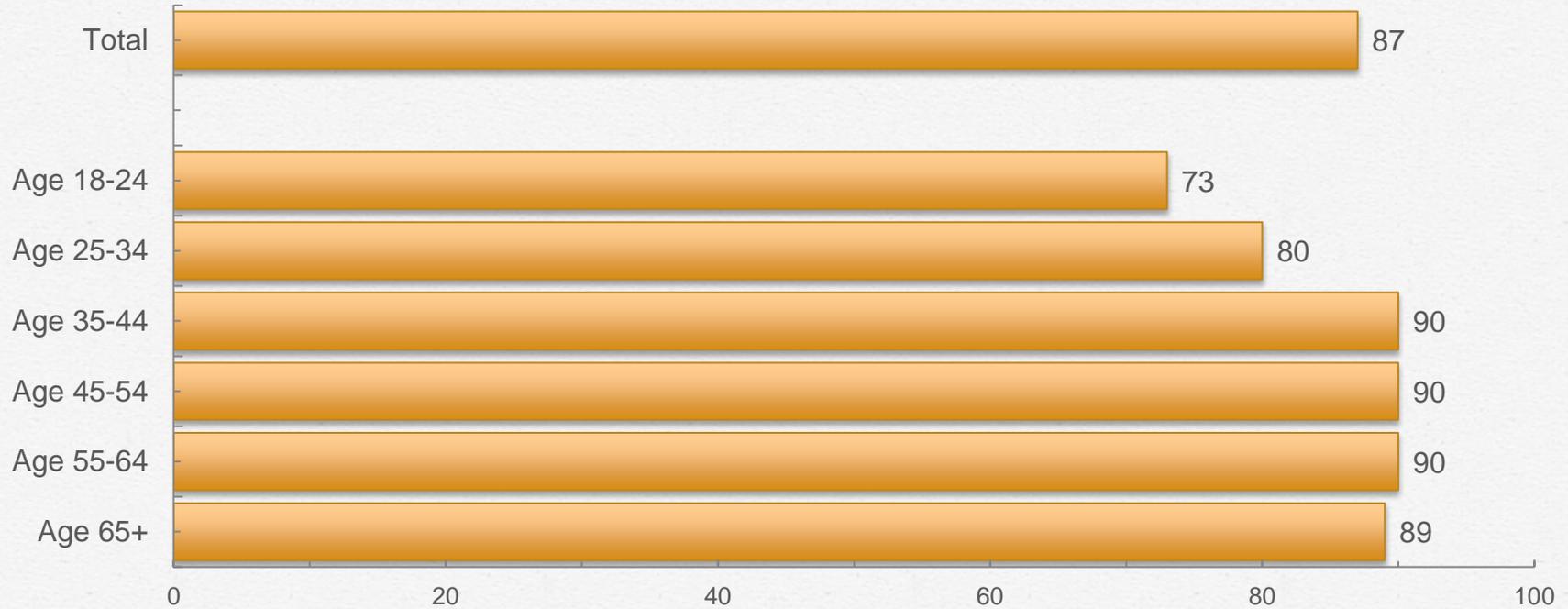
Make	% “very” or “somewhat” likely
Toyota	80%
Honda	79%
Nissan	74%
Ford	73%
Chevrolet	71%

Prospective Car Buyers: When choosing which car/vehicle to purchase/lease, how important is it that the car/vehicle has...?

Item (% saying "very" or "somewhat" important)	Australia	France	Germany	Italy	UK	U.S.
Radio (AM/FM/DAB/DAB+)	86%	93%	86%	91%	89%	88%
USB port	87%	89%	82%	87%	83%	85%
Bluetooth connection	88%	87%	83%	87%	80%	84%
Auxiliary jack	79%	80%	61%	69%	74%	78%
CD player	67%	65%	60%	68%	70%	66%
Android Auto	66%	65%	58%	75%	59%	65%
Online music services integrated directly into dashboard	67%	62%	56%	70%	63%	66%
Apple CarPlay	60%	49%	48%	50%	57%	60%
SiriusXM Satellite Radio	N/A	N/A	N/A	N/A	N/A	68%

Base: Typically listen to radio in a car/vehicle

% saying it's "very" or "somewhat" important for a car/vehicle to have AM/FM/DAB/DAB+ radio



Frequently listen to traditional “over-the-air” radio when in a car/vehicle when...

Item (% saying “frequently”)	Australia	France	Germany	Italy	UK	U.S.
Going on long car trips	44%	40%	57%	59%	43%	43%
Driving around locally	46%	51%	48%	43%	42%	48%
You want to be entertained	46%	45%	46%	44%	42%	45%
You want to stay up to date with news and information	48%	45%	50%	46%	41%	39%
You want to hear your favorite music	43%	41%	44%	48%	41%	47%
Commuting to work	35%	40%	42%	43%	32%	39%
You want to hear about what’s going on in your local area	39%	37%	46%	32%	32%	34%
You want traffic updates	35%	28%	51%	36%	34%	35%
You want weather updates	35%	31%	43%	32%	30%	34%
You are with friends/family	26%	20%	36%	27%	27%	33%
You are with children	20%	19%	21%	18%	24%	26%

Base: Typically listen to radio in a car/vehicle

How much do you agree with the following statements about listening to traditional “over-the-air” radio in a car/vehicle?

Statement (% “strongly” or “somewhat” agree)	Australia	France	Germany	Italy	UK	U.S.
Radio keeps you company in the car/vehicle	91%	92%	90%	94%	92%	91%
You would miss your favorite radio stations if you couldn’t receive them in your car/vehicle	89%	89%	91%	90%	86%	87%
Radio should be standard in every car/vehicle	90%	90%	91%	93%	89%	89%
You would really miss having radio in a car/vehicle	87%	88%	89%	91%	87%	89%
You rarely experience gaps in audio when listening to radio in a car/vehicle	87%	83%	90%	84%	90%	85%
You listen to radio in a car/vehicle because it’s free	91%	83%	80%	84%	88%	89%
It is easier to listen to radio in a car/vehicle than to listen to other types of audio sources	87%	83%	87%	88%	85%	85%
Radio provides a better listening experience in the car than other types of audio sources	81%	78%	77%	84%	83%	78%
You listen to radio in a car/vehicle because it doesn’t use up your mobile data plan	76%	77%	76%	73%	75%	71%
Radio in the car/vehicle often feels outdated	49%	44%	46%	44%	51%	56%



Base: Typically listen to radio in a car/vehicle

When listening to traditional, “over-the-air radio in a car/vehicle, “**very**” satisfied with....

Feature (% saying “very” or “somewhat” satisfied)	Australia	France	Germany	Italy	UK	U.S.
How easy it is to turn on your favorite stations	46%	41%	52%	39%	49%	55%
The overall look and feel of the radio receiver	42%	33%	44%	34%	47%	47%
The audio quality	49%	38%	51%	41%	50%	53%
The technology features of the radio receiver	38%	34%	48%	31%	45%	44%
The variety of radio stations	43%	37%	47%	37%	47%	45%
The quality of reception	46%	36%	51%	36%	48%	50%
The station information received on dashboard	41%	31%	46%	31%	44%	47%
How easy it is to find new stations	39%	34%	46%	34%	43%	43%

Base: Typically listen to radio in a car/vehicle

How important is it that radio in a car/vehicle show...?

Feature (% saying "very" or "somewhat" important)	Australia	France	Germany	Italy	UK	U.S.
The name of the station	78%	86%	81%	89%	80%	76%
The name of the song/artist playing	71%	80%	73%	88%	71%	80%
The logo of the station	51%	58%	57%	65%	55%	57%
Artist images or album cover art	50%	52%	49%	57%	51%	56%

Features most interested in having available through radio:

Feature (% ranking feature in top five)	Australia	France	Germany	Italy	UK	U.S.
Ability to search for radio stations using voice controls	56%	64%	54%	63%	53%	56%
Ability to skip songs	55%	55%	59%	57%	56%	57%
Information about the content you are listening to	51%	60%	55%	55%	50%	52%
Ability to pause, rewind, or fast forward content	46%	52%	42%	56%	49%	44%
Ability to create personalized playlists	39%	42%	47%	46%	39%	45%
Ability to ask for song/station information using voice controls	38%	37%	37%	49%	40%	38%
Ability to pay to listen without any advertisements	44%	23%	25%	18%	40%	42%
Recommendations for other audio programs/podcasts you might be interested in	32%	25%	32%	31%	34%	32%
Images of show/presenter/artist you are listening to	29%	28%	34%	28%	31%	31%
Recommendations for other radio stations you might be interested in	24%	30%	36%	31%	26%	29%
Mix of live and on-demand radio content, matched to length of trip	33%	35%	27%	20%	27%	25%
Advertisements customized to your interests	25%	31%	26%	24%	27%	24%
Access to more episodes/podcasts/bonus content from favorite radio show	27%	21%	27%	24%	29%	26%





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