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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

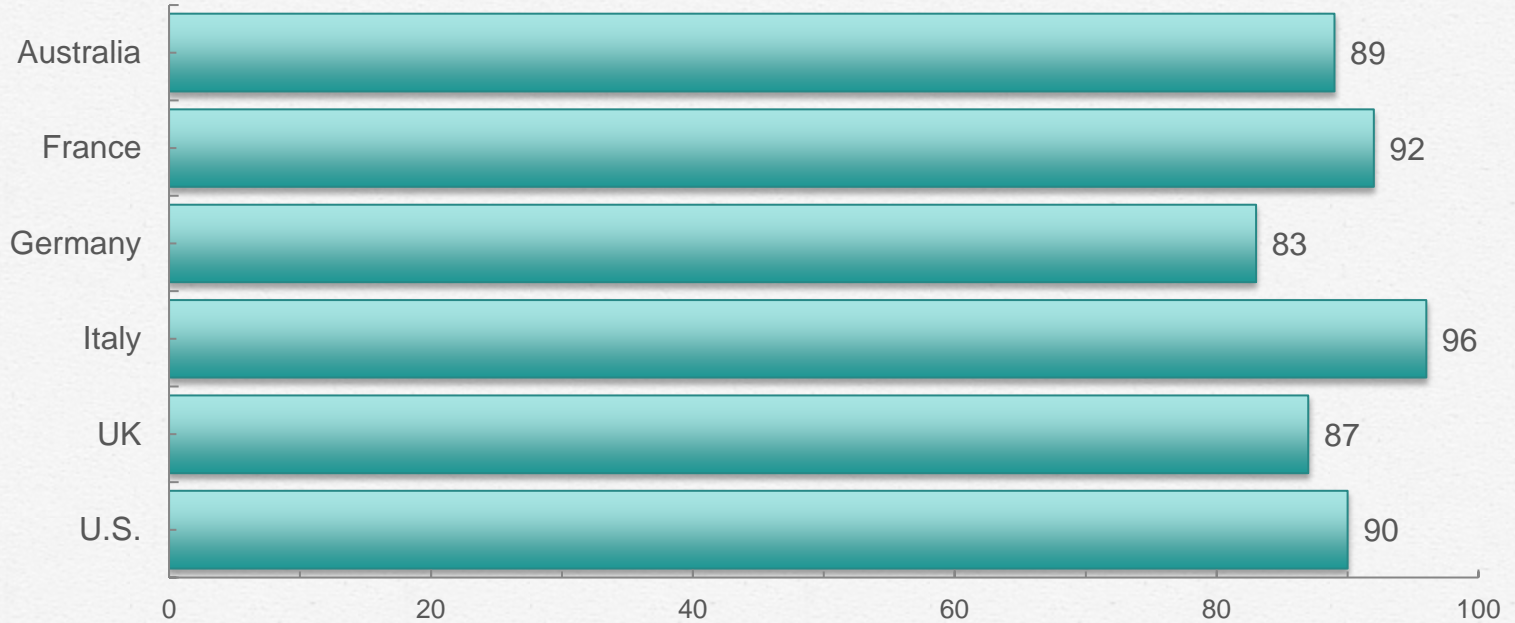
# Survey Methodology:

- 24 Qualitative Interviews in six countries
  - All respondents ages 25-54
  - Interviews conducted via Zoom in English, Italian, and French during September, 2021
  - Respondents must have:
    - 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**?



Base: Listen to radio



# Recent 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+)	66%	67%	68%	64%	70%	59%
Bluetooth connection	64%	60%	59%	57%	57%	47%
USB port	52%	57%	48%	52%	53%	44%
CD player	23%	26%	29%	30%	31%	24%
Android Auto	28%	24%	29%	31%	20%	19%
Online music services integrated directly into dashboard	22%	16%	16%	19%	27%	18%
Apple CarPlay	29%	14%	16%	14%	23%	21%
SiriusXM Satellite Radio	N/A	N/A	N/A	N/A	N/A	32%

# 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%

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

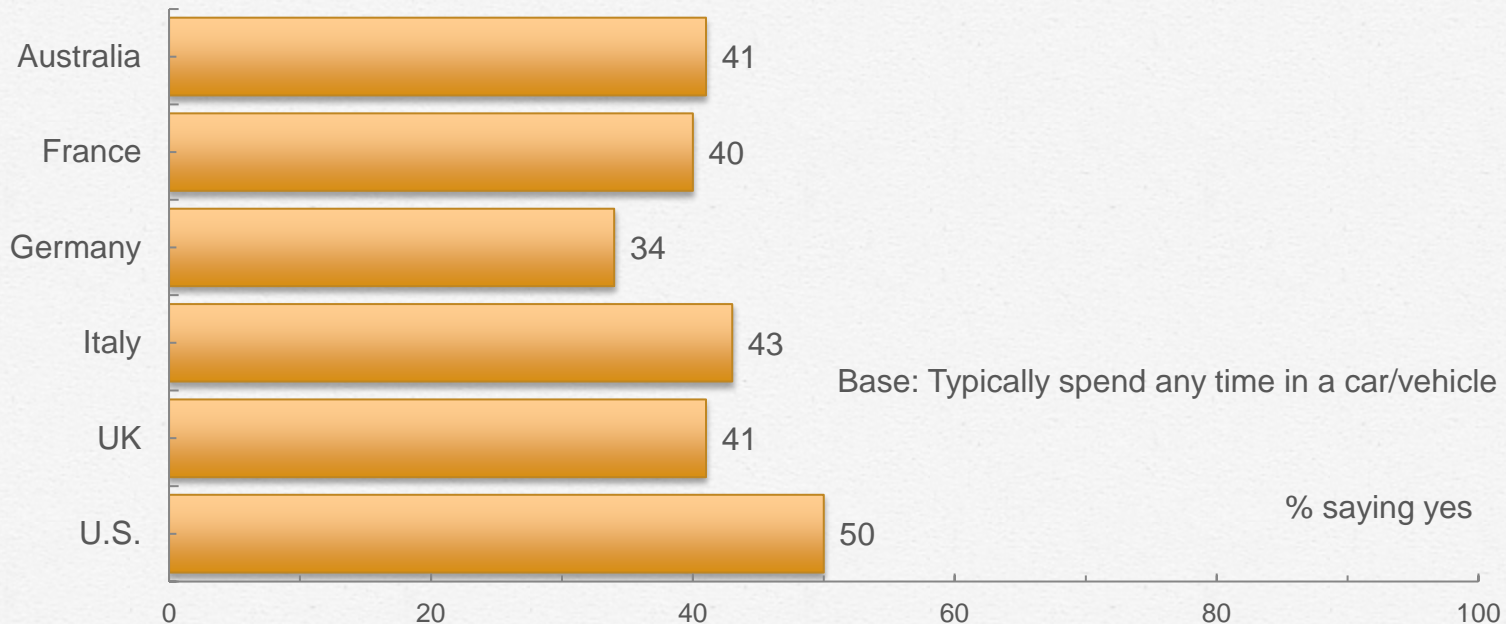
Statement (% “strongly” or “somewhat” agree)	Australia	France	Germany	Italy	UK	U.S.
Radio keeps you company in the car/vehicle	91%	92%	90%	94%	92%	91%
You would miss your favorite radio stations if you couldn’t receive them in your car/vehicle	89%	89%	91%	90%	86%	87%
Radio should be standard in every 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



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



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

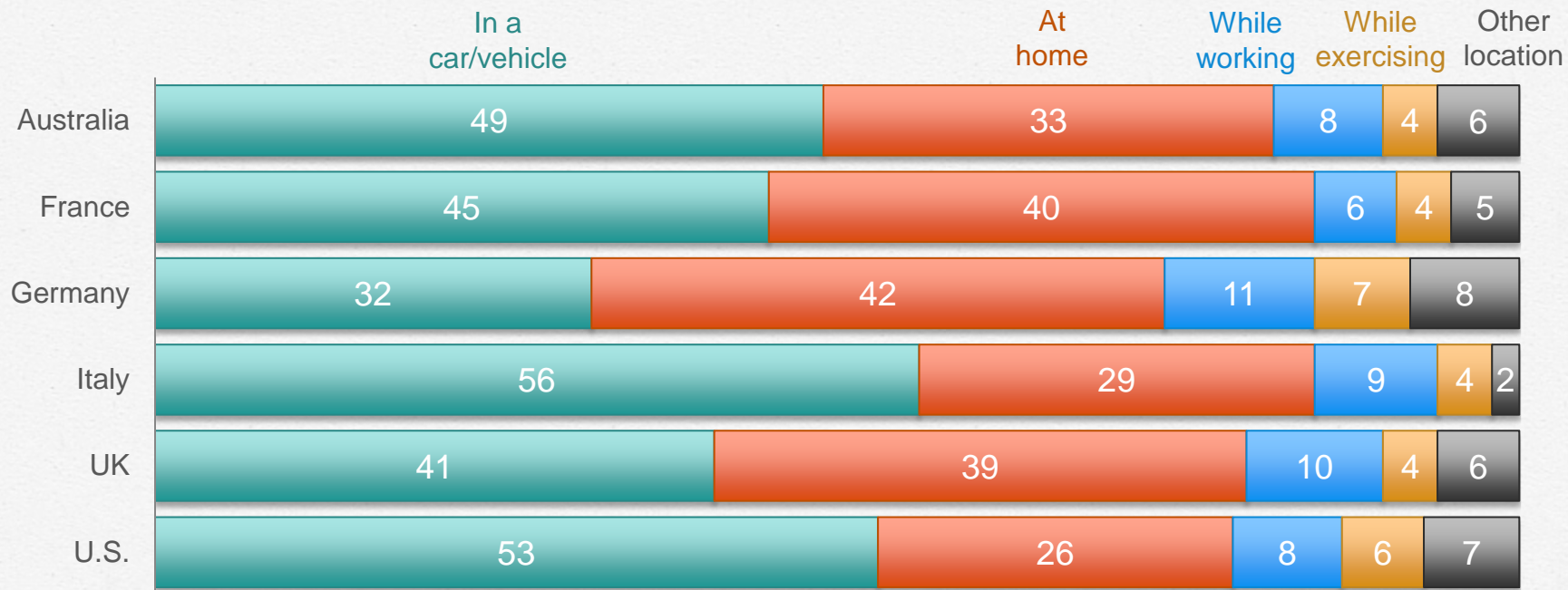


SiriusXM Satellite Radio



Base: Typically spend any time in a car/vehicle

# Where do you typically listen to radio most often?



Base: Listen to radio

# 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%

# 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.
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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





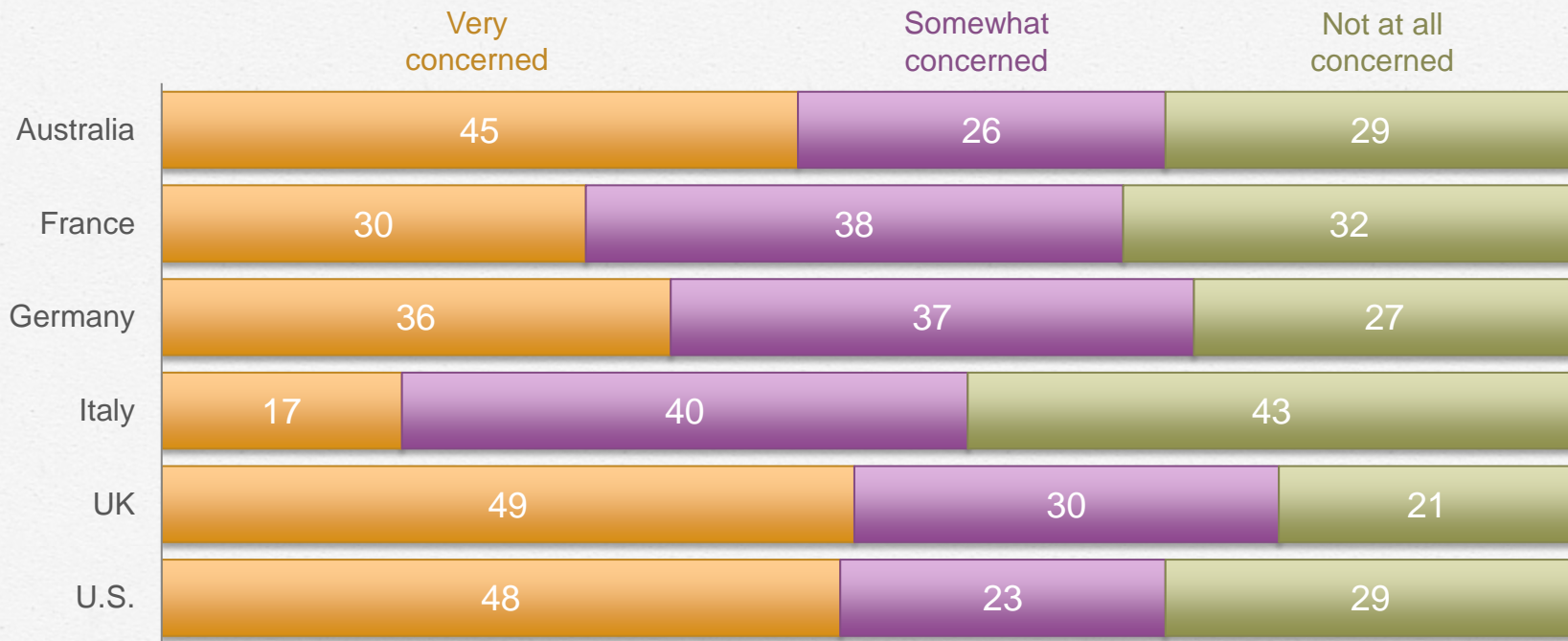
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Base: Typically listen to radio in a car/vehicle



# 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

# 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%

# 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%



How you know.<sup>SM</sup>