

# Miles Different: In-Car Audio



# NPR In-Car Survey





# THE INFINITE DIAL

## 2018



# Share of Ear<sup>®</sup>

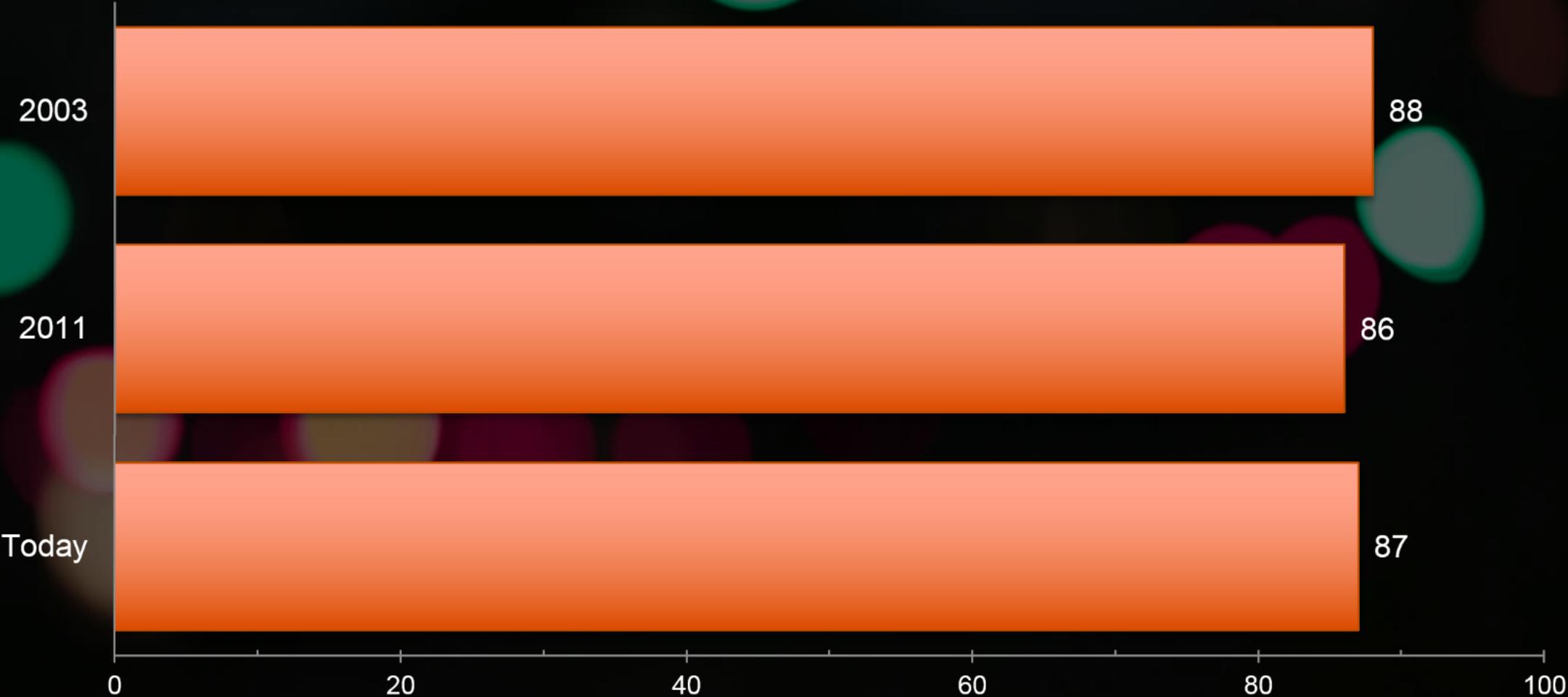
Americans' Share of Time Spent  
Listening to Audio Sources



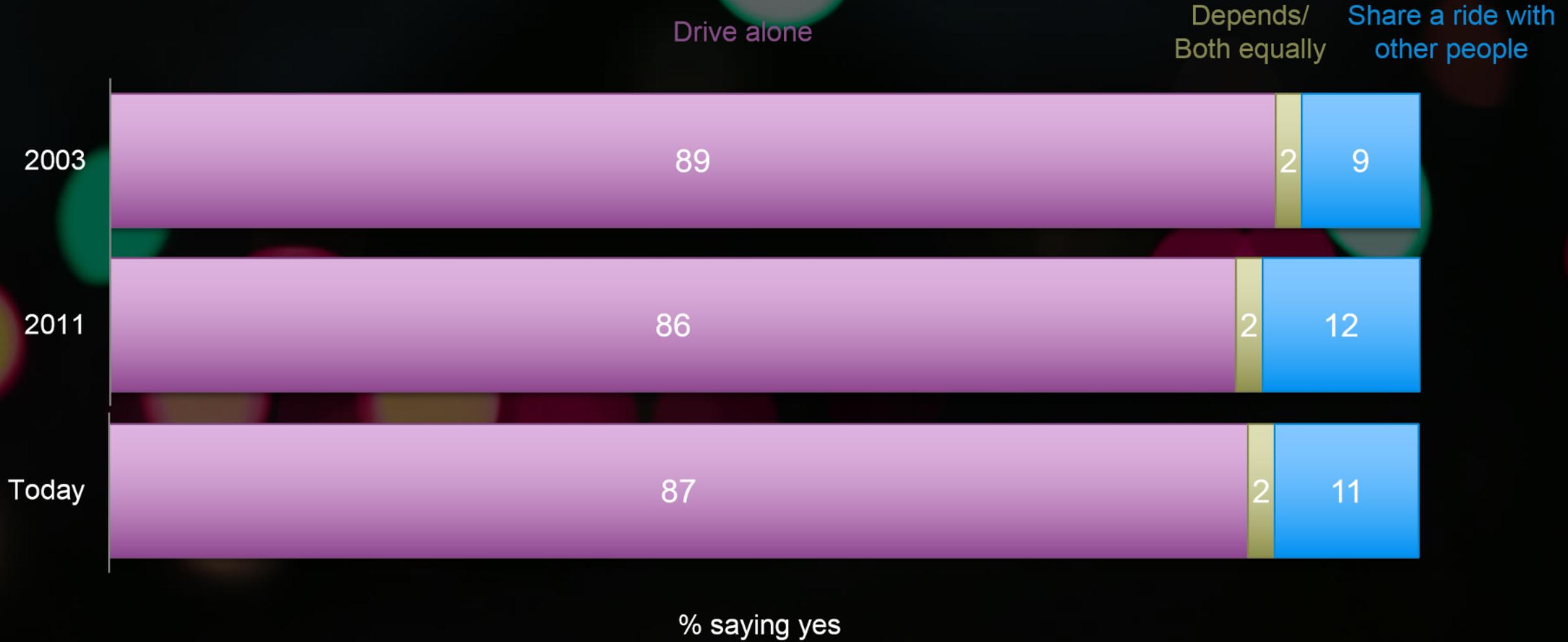


**1. The car is as important  
as ever in the United States**

# Do you usually travel or commute to your primary job by car?



# When you travel to work by car, do you usually...?



# Share of Ear<sup>®</sup>

Americans 13+ listen to

**73** minutes of audio  
in the car per day



# 2. The car is the top location for audio listening

# Share of Ear<sup>®</sup>

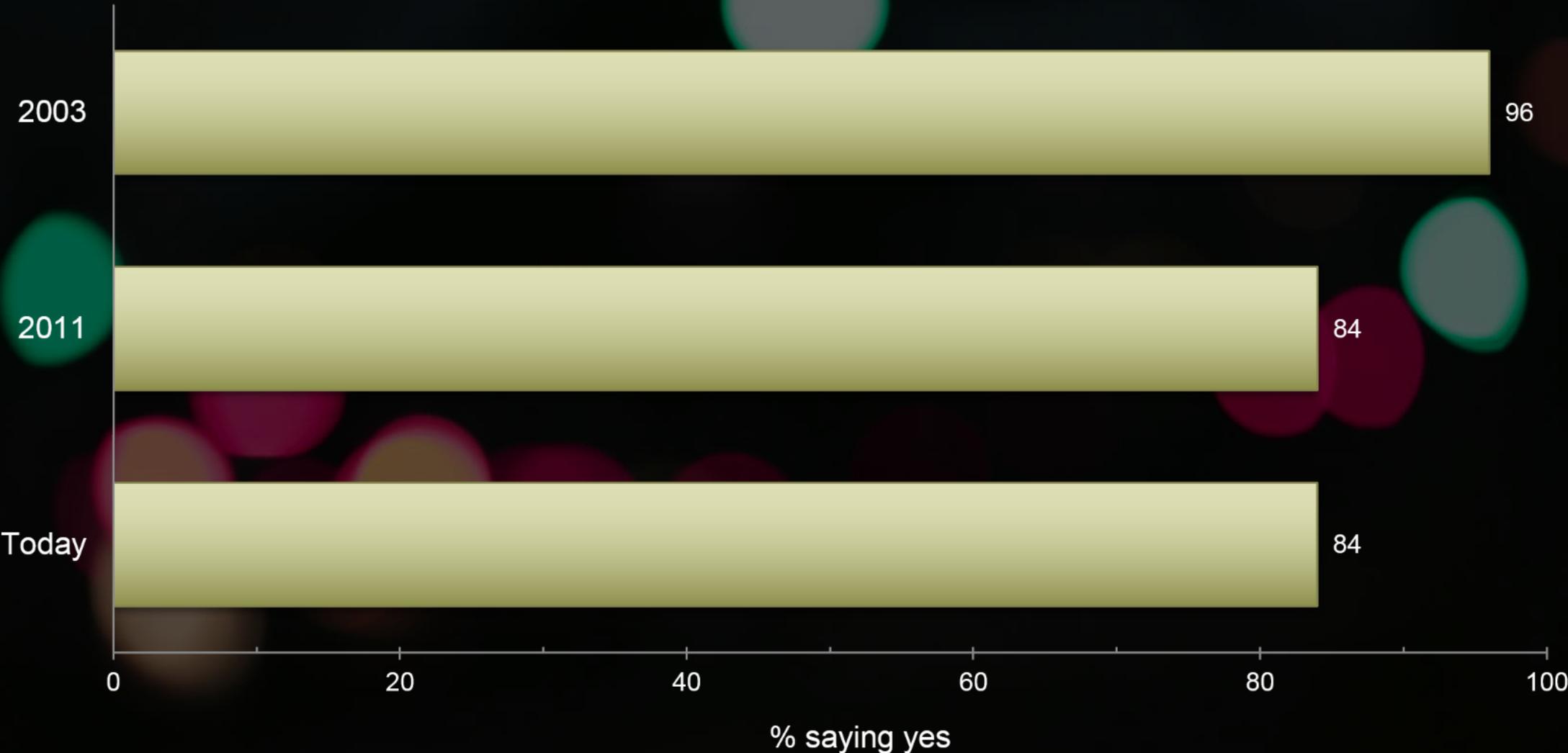
Americans' 13+ Daily  
Listenership in Each Location





# 3. Broadcast radio remains the king of in-car audio

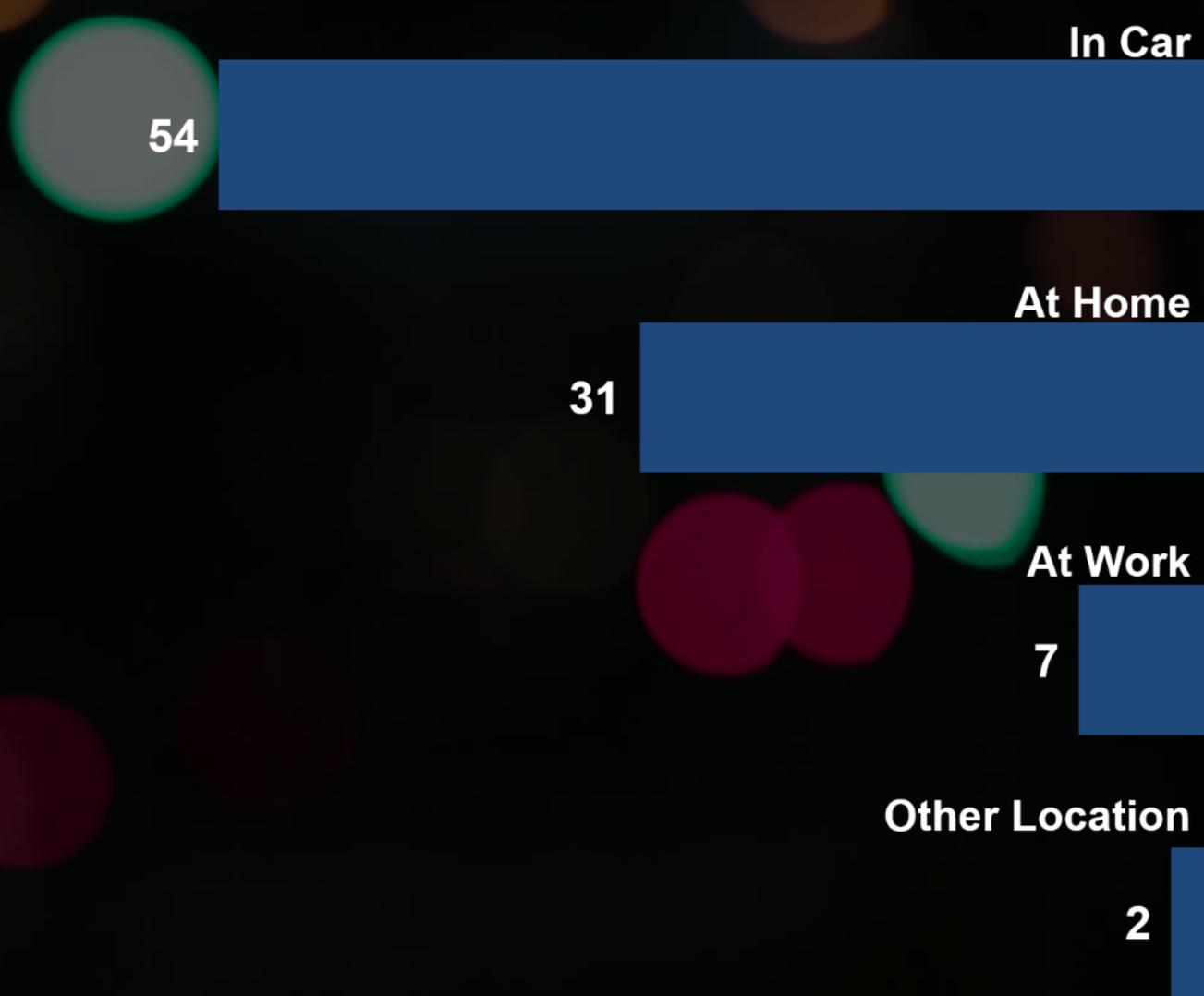
# In your primary car, do you currently use AM/FM radio?



# Share of Ear<sup>®</sup>

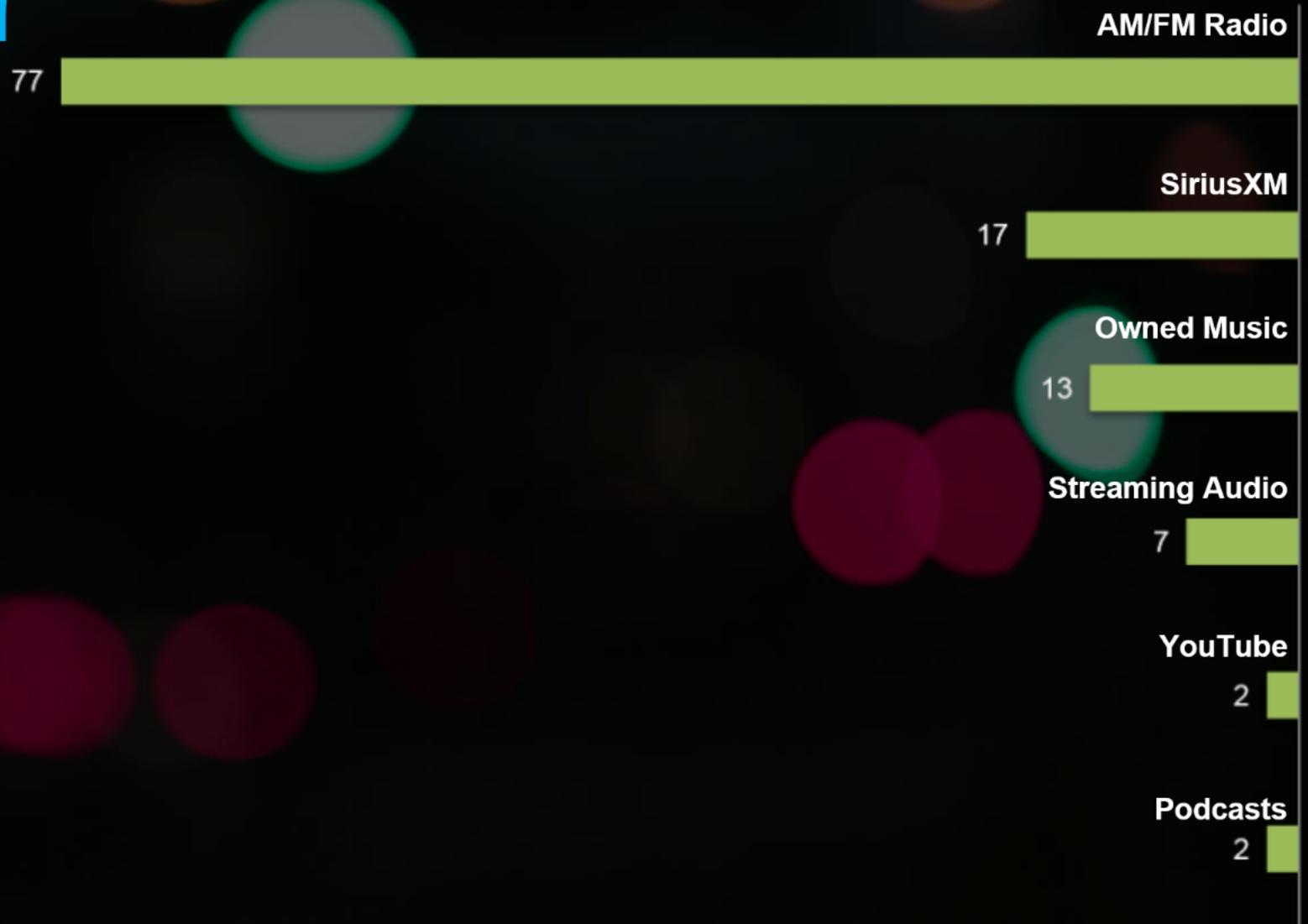
AM/FM Radio Daily

Listenership in Each Location



# Share of Ear<sup>®</sup>

What Percent of In-Car Audio Consumers Use Each Platform in a Typical Day



YouTube for music and music videos only

AM/FM Radio includes over the air and radio streams

Streaming Audio includes pure plays such as Pandora, Spotify, and others

# Share of Ear<sup>®</sup>

What Percent of In-Car Audio Consumers Use Each Platform in a Typical Day

- 13-34
- 35-54
- 55+



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# Share of Ear<sup>®</sup>

**62%**

**of radio listeners 13-34  
only listen in their car**

**54%**

**of radio listeners  
only listen in their car**

# Share of Ear<sup>®</sup>

Americans' 13+ Share  
of Time Spent Listening  
to Audio Sources in a **Car/Truck**

AM/FM Radio  
67%

SiriusXM  
17%

Owned Music  
7%

Streaming Audio  
5%

Other  
4%

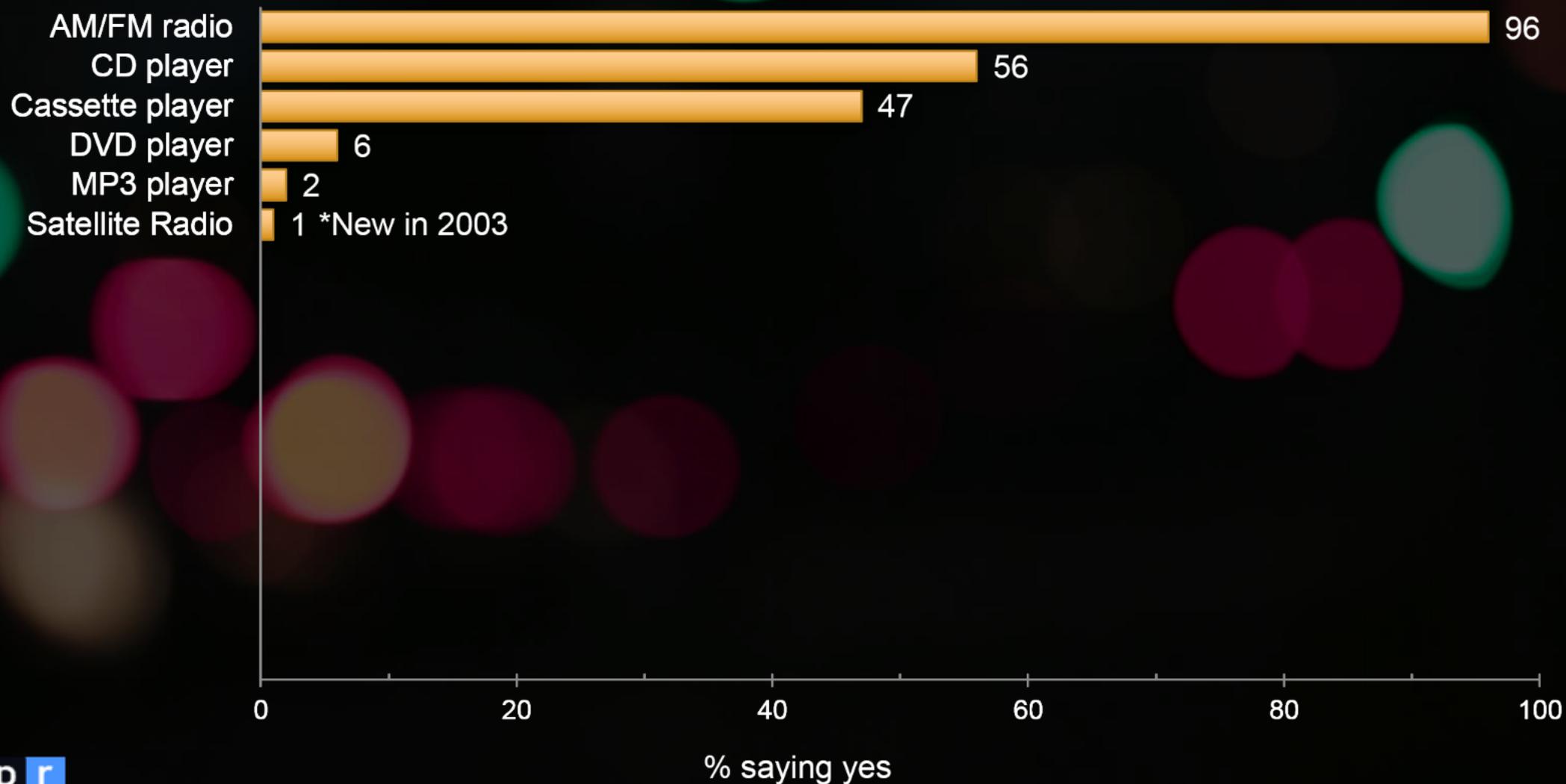
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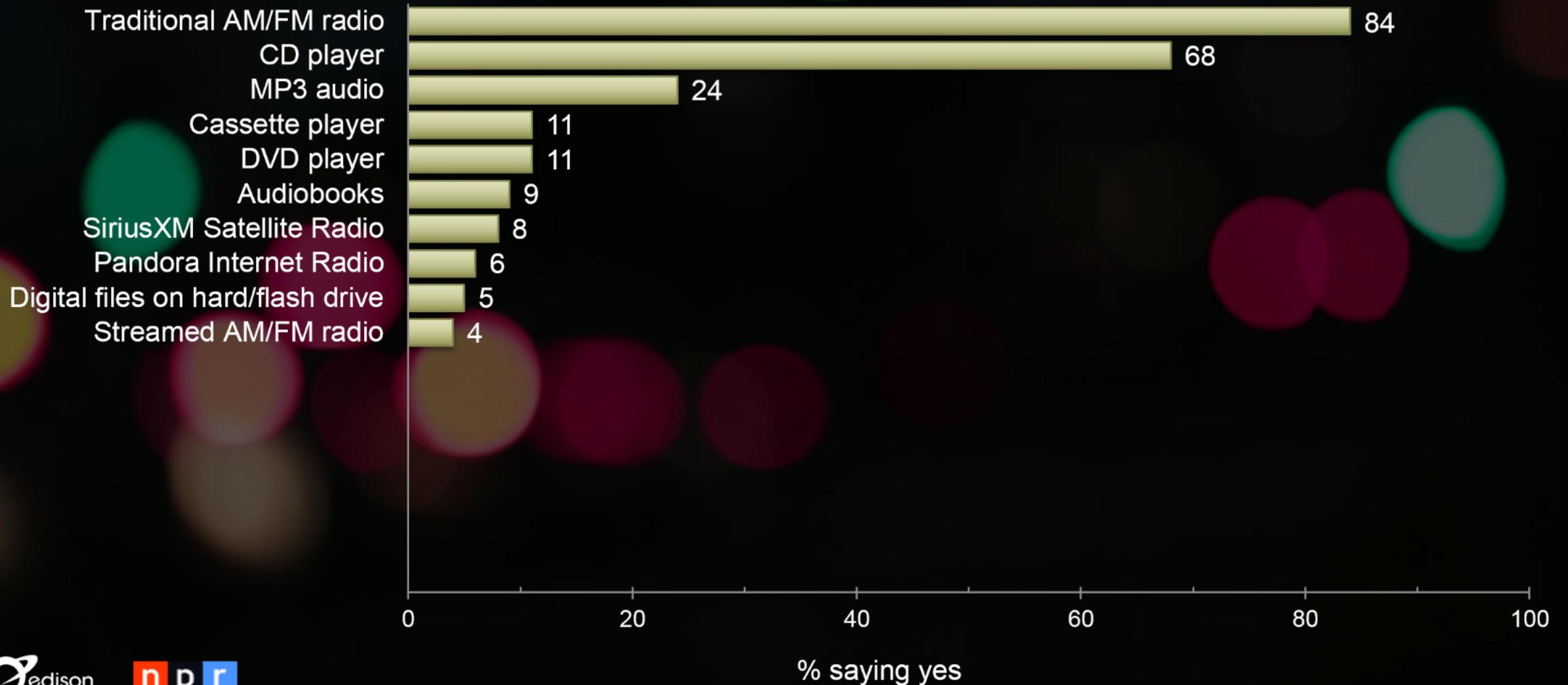


**4. Consumers now have many more options for audio in their cars**

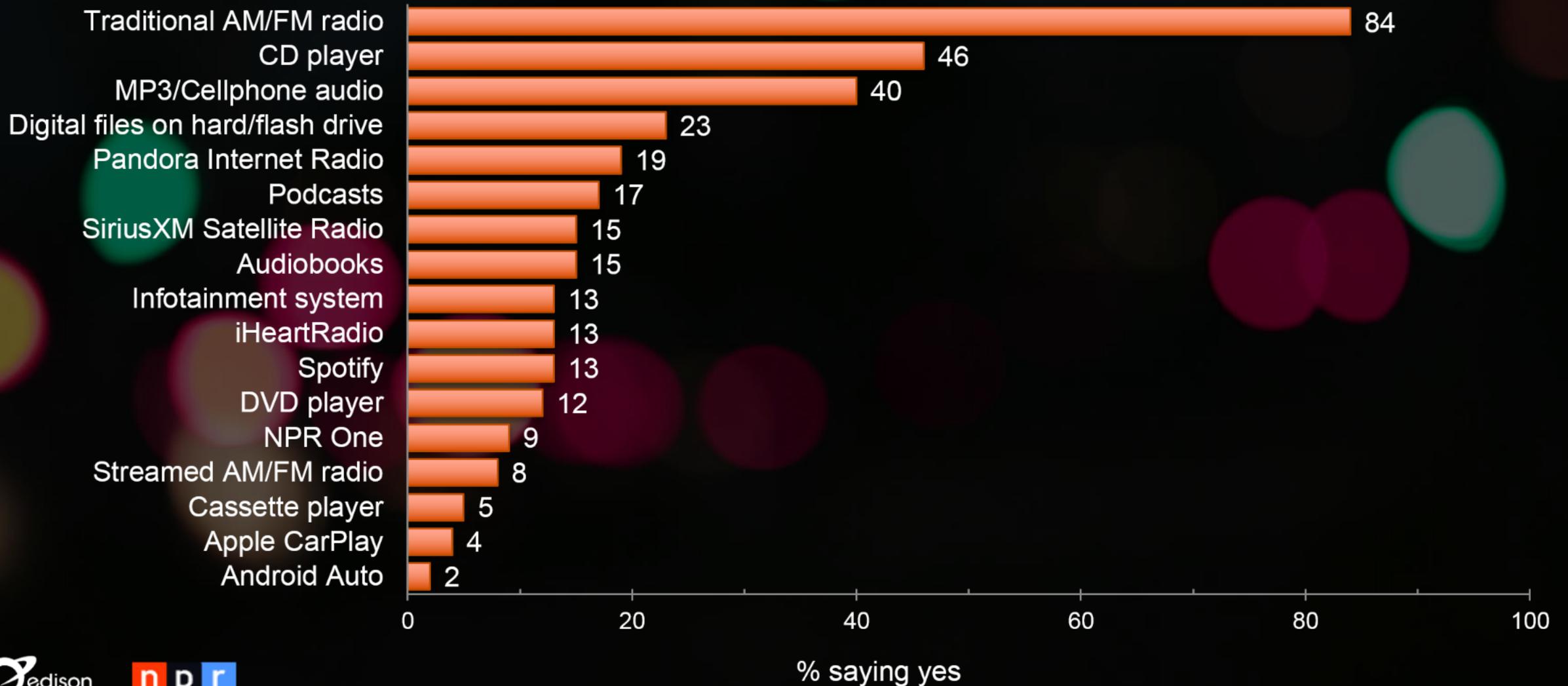
# In your primary car, do you currently use...? (2003)

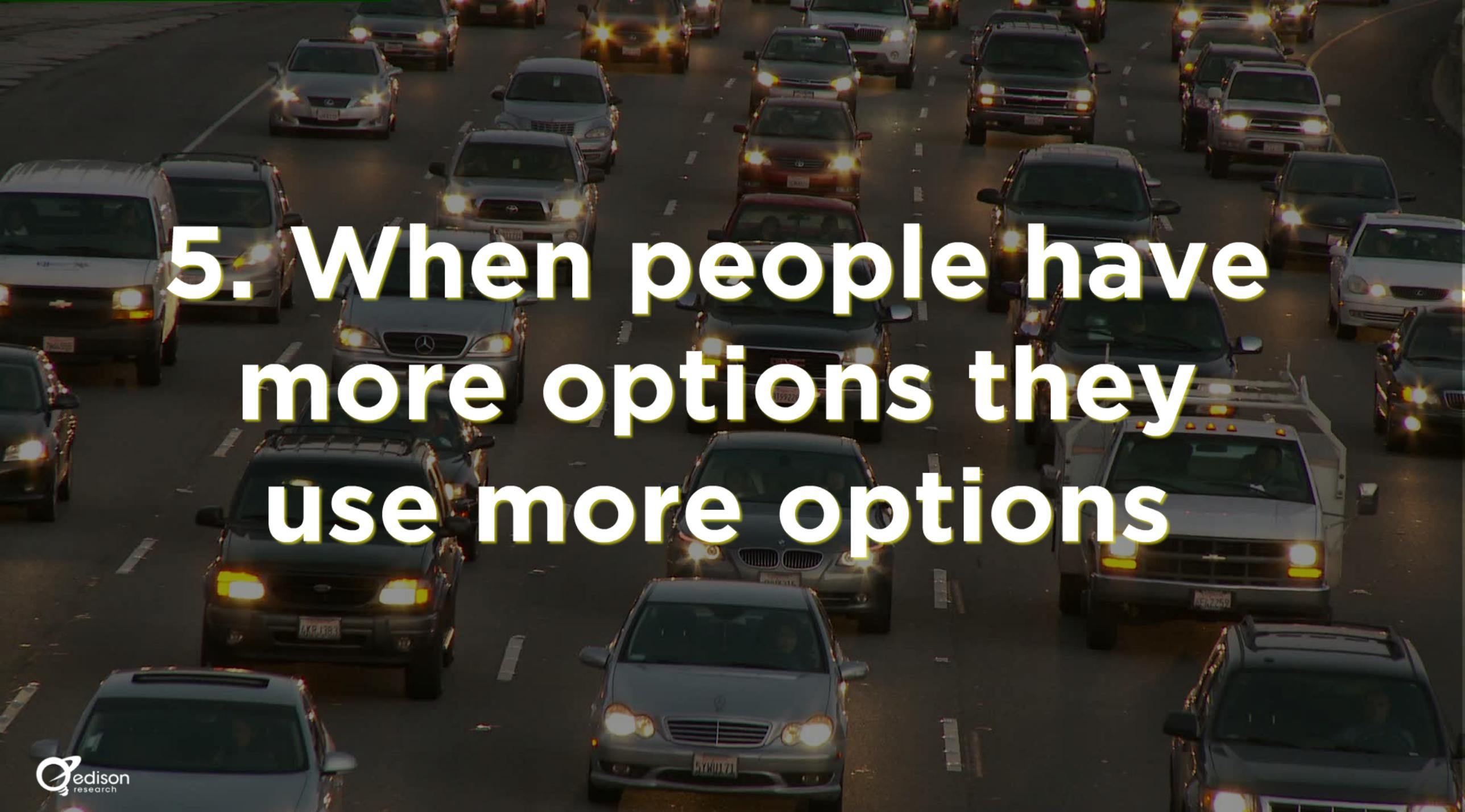


# In your primary car, do you currently use...? (2011)



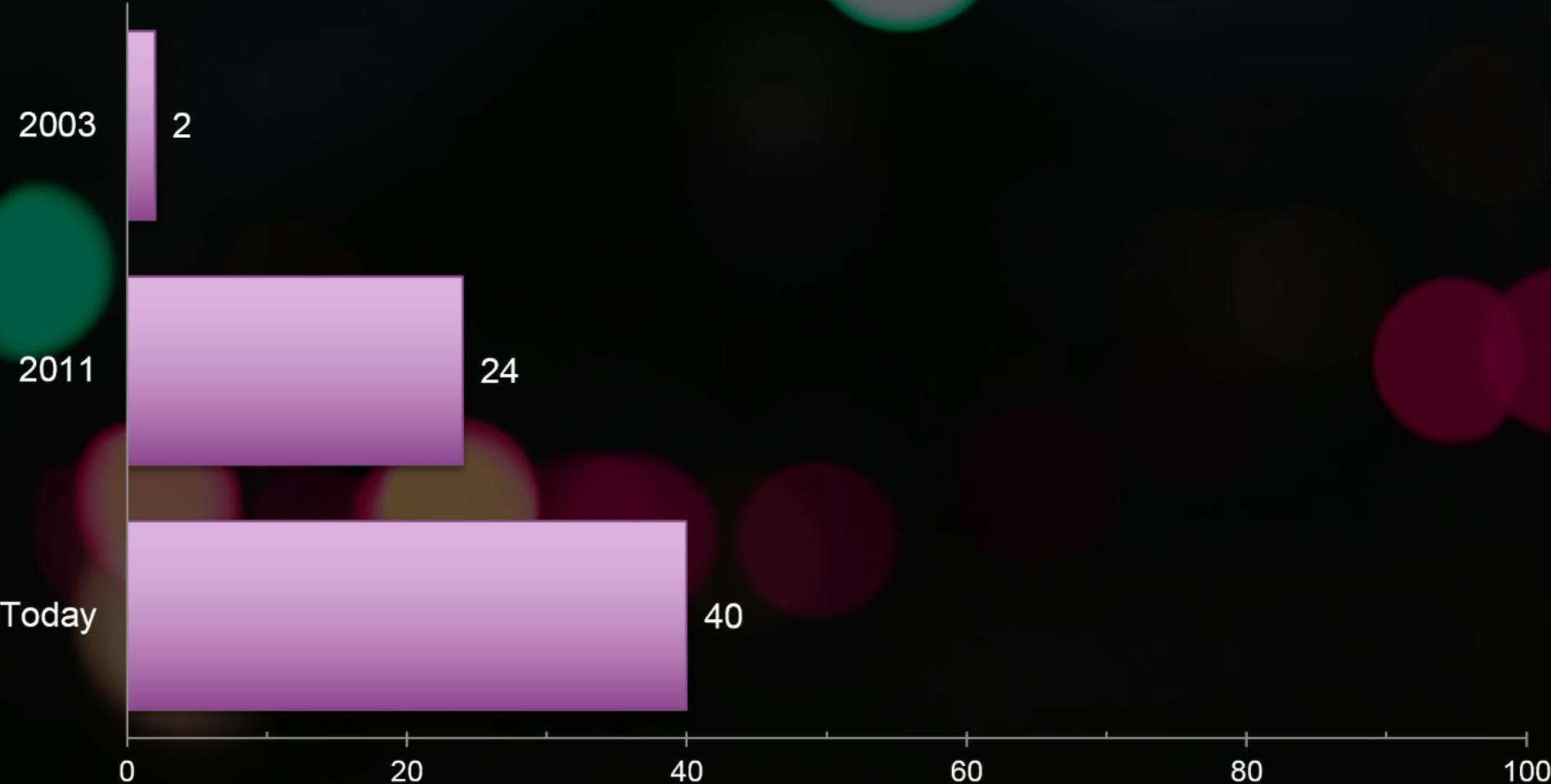
# In your primary car, do you currently use...? (Today)



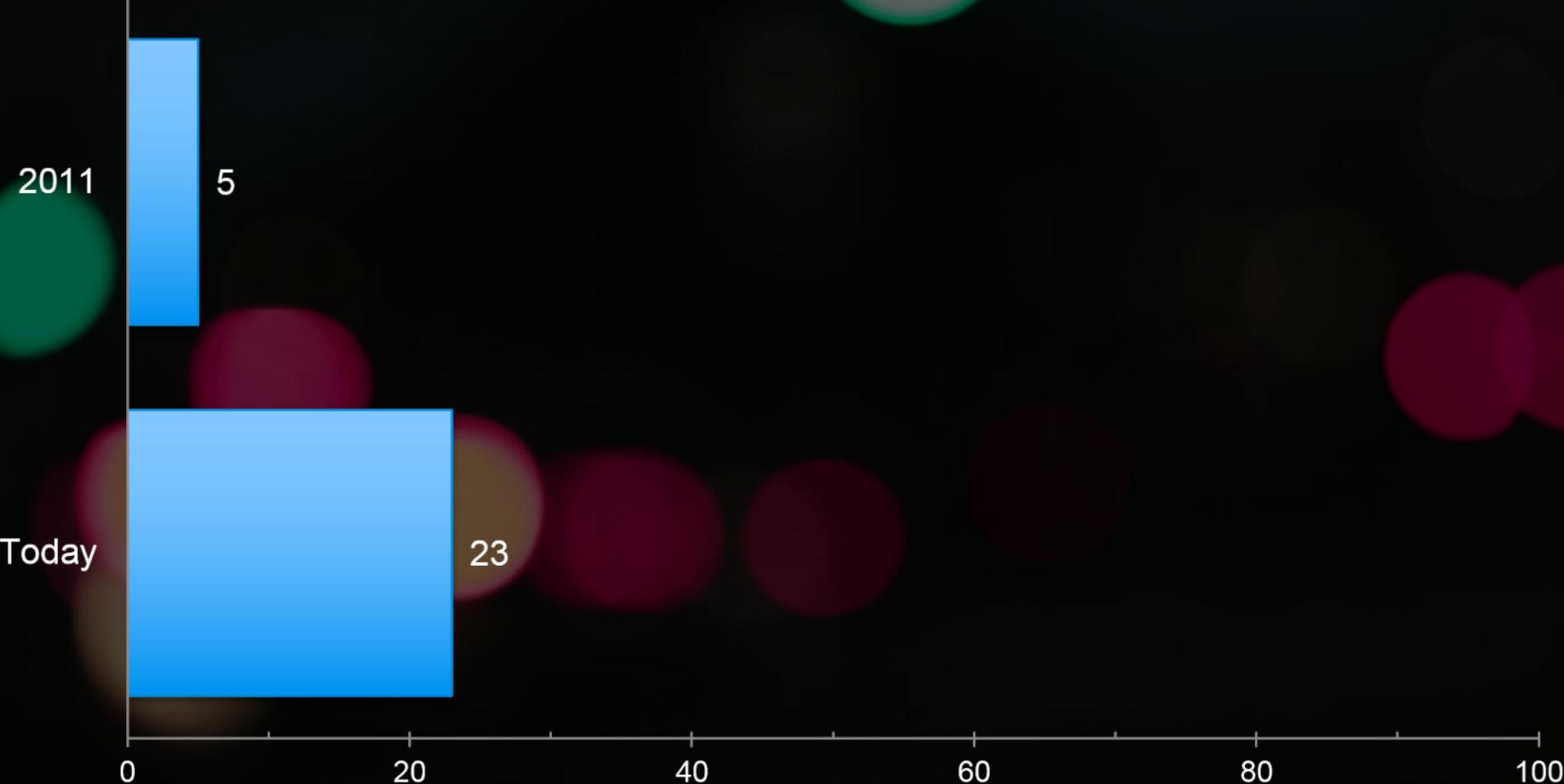


**5. When people have  
more options they  
use more options**

# In your primary car, do you currently use a MP3/Cellphone?



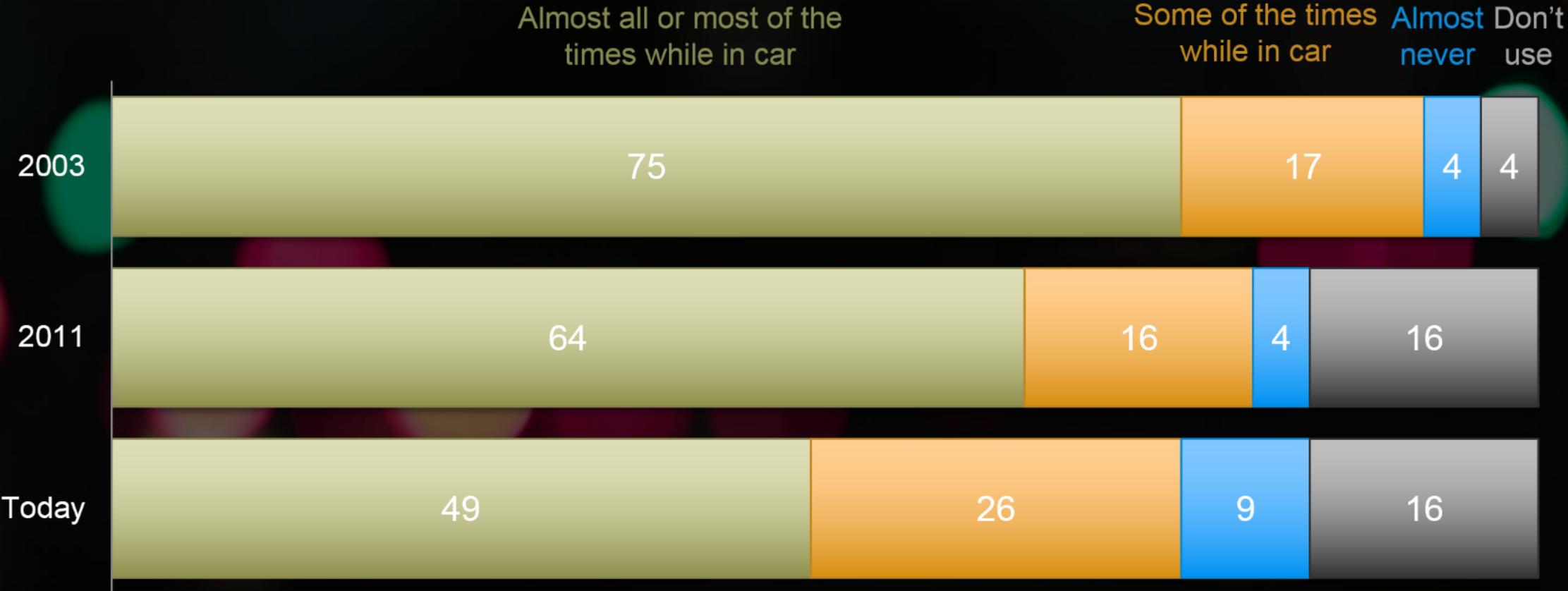
# In your primary car, do you currently use digital files on a hard/flash drive?



**15%**  
of drivers currently  
use SiriusXM in  
their primary car



# How often do you use AM/FM radio while in your car?

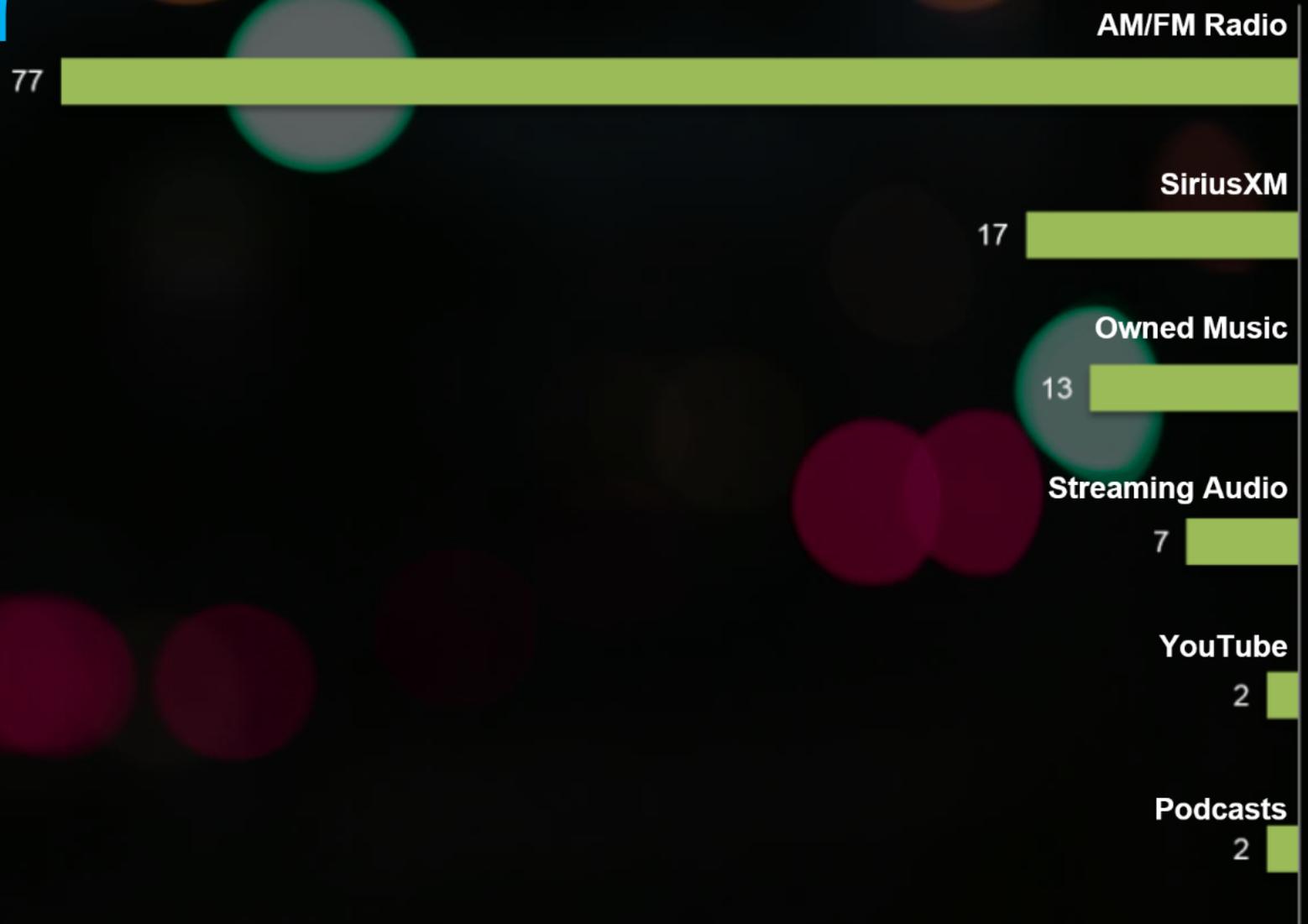




**6. Drivers of the newest cars are... miles different**

# Share of Ear<sup>®</sup>

What Percent of In-Car Audio Consumers Use Each Platform in a Typical Day



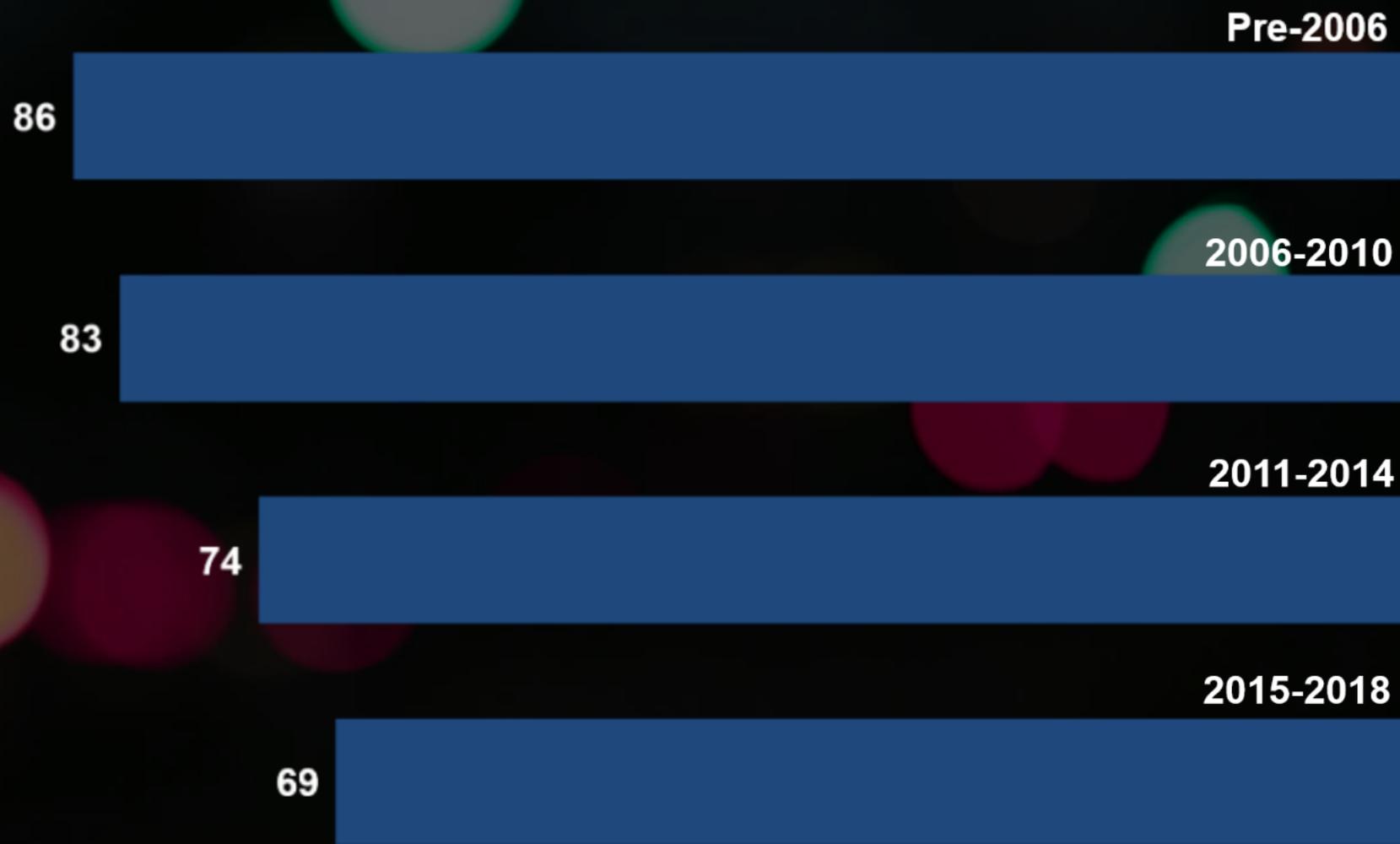
YouTube for music and music videos only

AM/FM Radio includes over the air and radio streams

Streaming Audio includes pure plays such as Pandora, Spotify, and others

# Share of Ear<sup>®</sup>

In Car AM/FM Radio  
Daily Listenership by  
Model Year



# Share of Ear<sup>®</sup>

Americans' 13+ Share  
of Time Spent Listening  
to Audio Sources in a **Car/Truck**

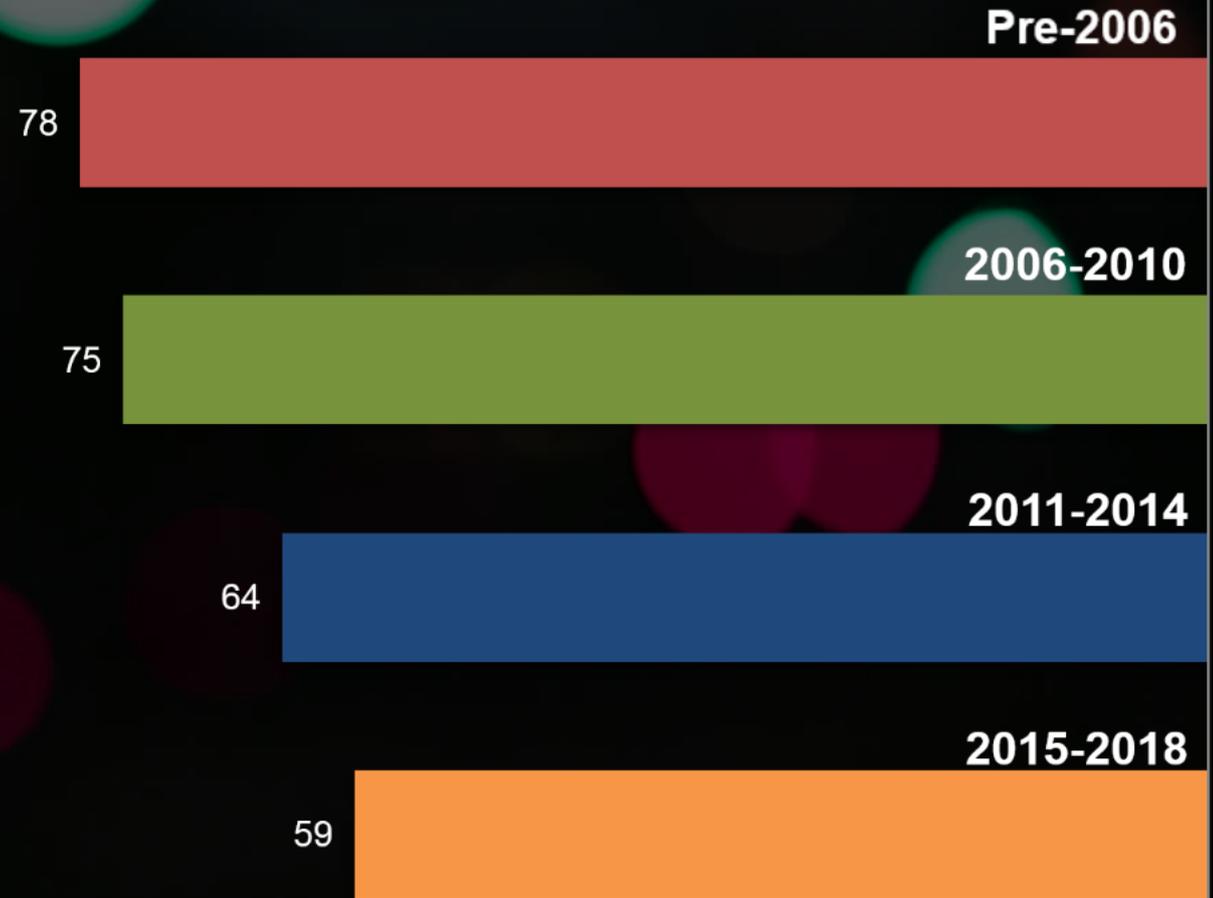


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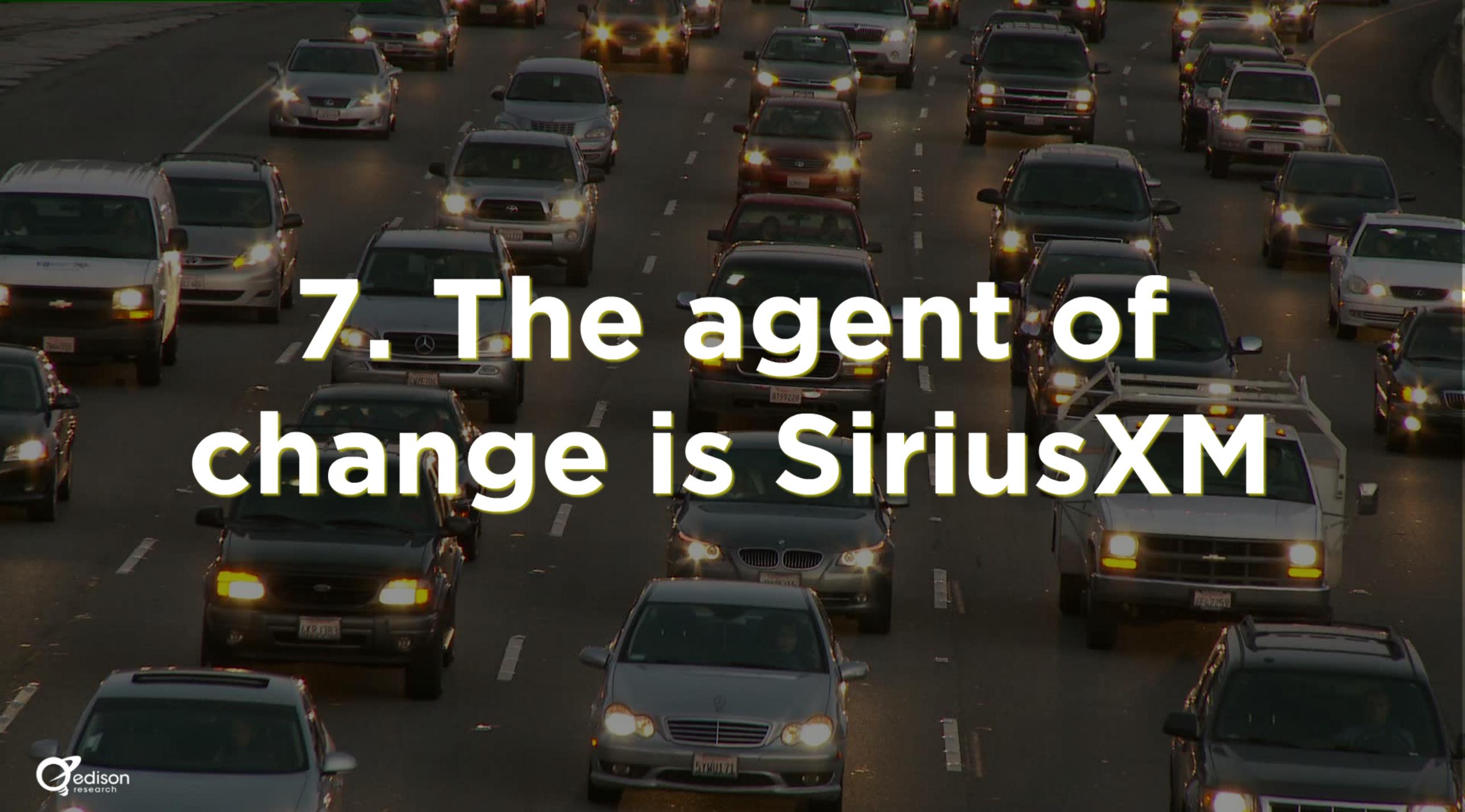
Streaming Audio includes pure plays such as Pandora, Spotify, and others

# Share of Ear<sup>®</sup>

Americans' 13+ Share of Time Spent Listening to **AM/FM Radio in a Car/Truck** by Model Year

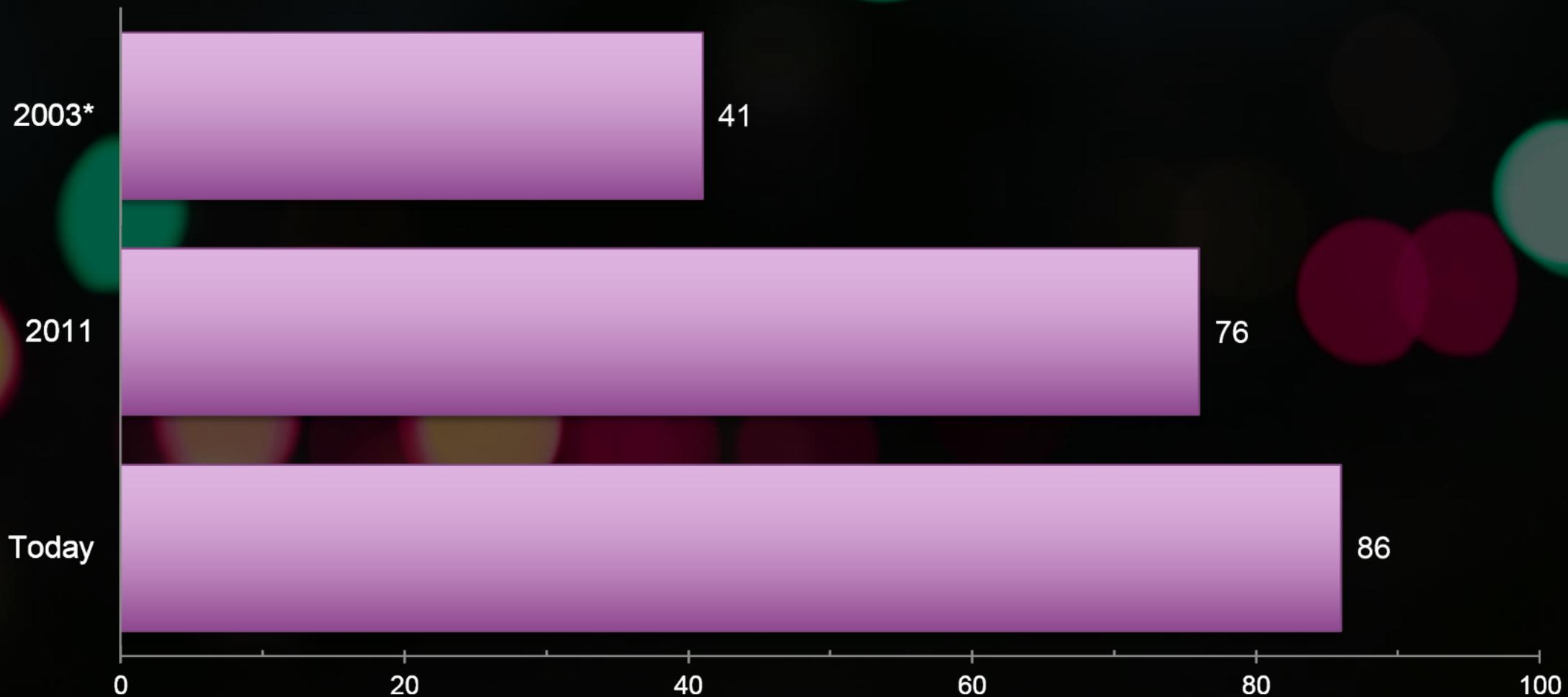


AM/FM Radio includes over the air and radio streams



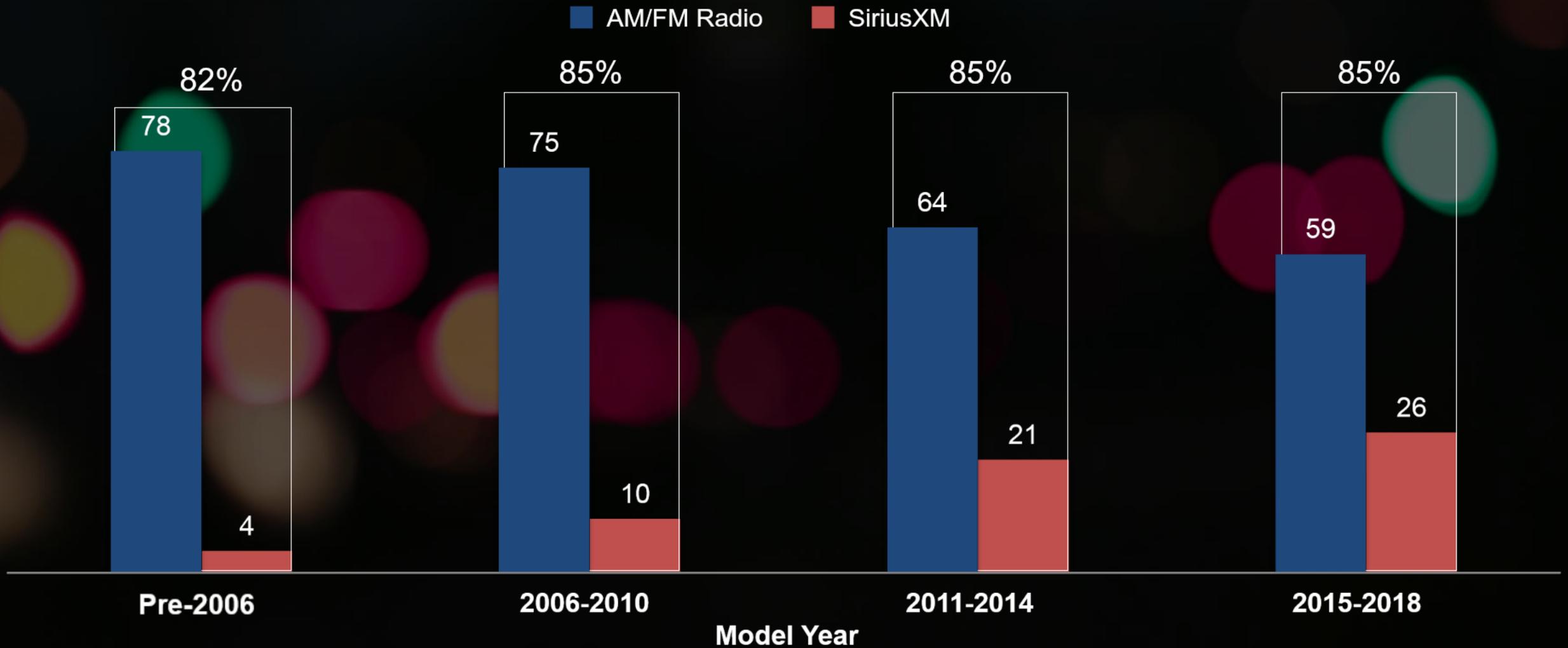
# 7. The agent of change is SiriusXM

# Have you ever heard of a satellite radio company named **SiriusXM**?



# Share of Ear<sup>®</sup>

Americans' 13+ Share of Time Spent Listening to Audio Sources in a Car/Truck by Model Year



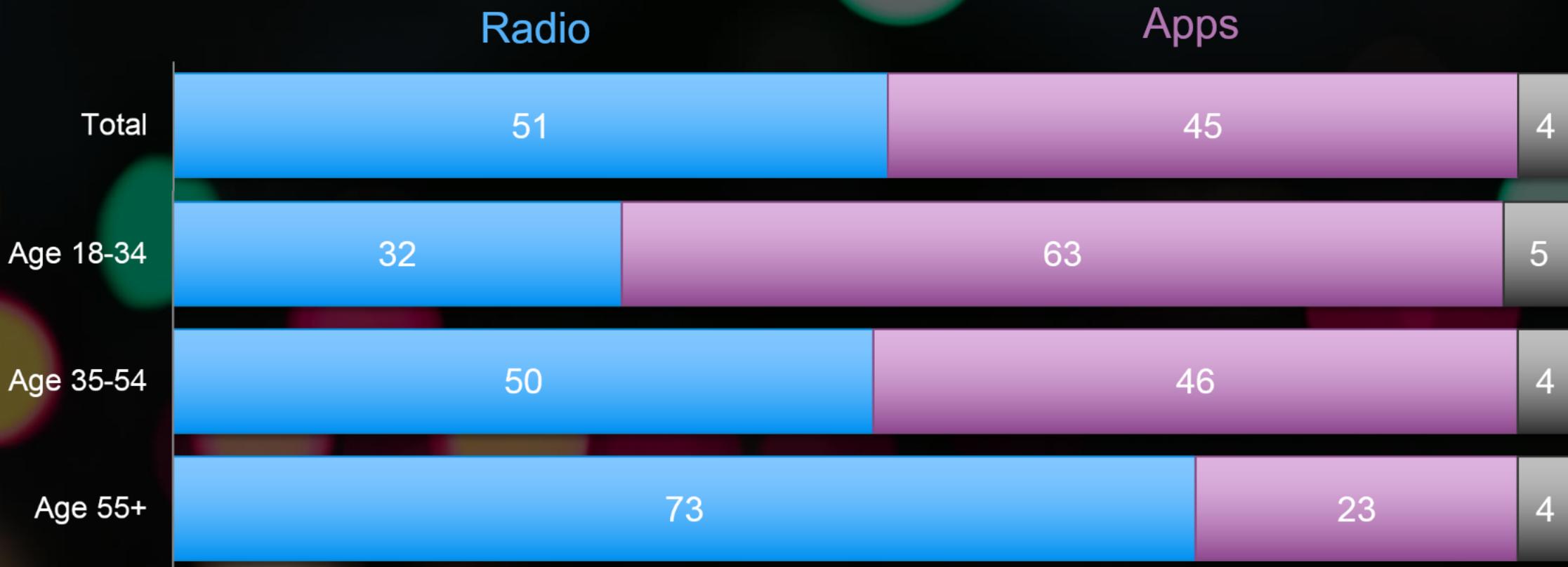


# 8. Traffic reports as we know them are doomed

# Do you regularly use traditional AM/FM radio or an app on a mobile device for traffic reports while in the car?



# Which source do you use most often for traffic reports while in the car?



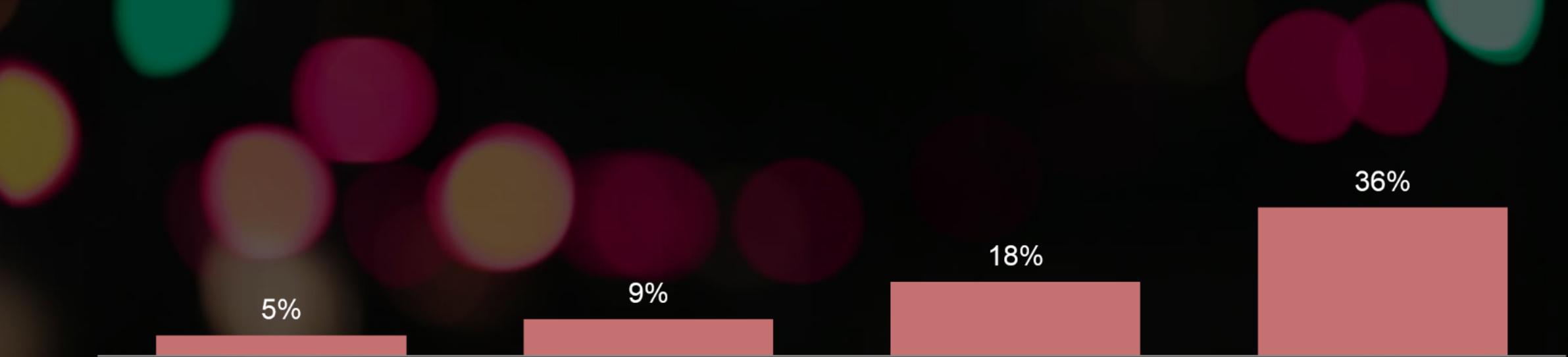


**9. Streaming not yet  
a big factor, but...**

# Cars with in-dash infotainment systems by Model Year of Primary Vehicle



Base: Age 18+ who have driven or ridden in a car in the last month



Model Year of Primary Vehicle

% reported having an in-dash system in their primary vehicle

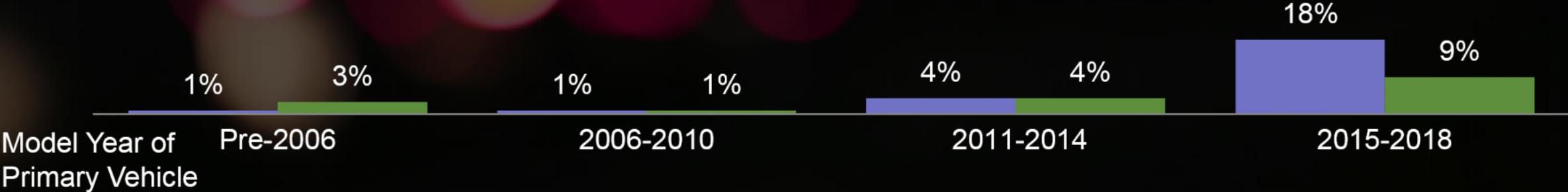


# Apple Car Play and Android Auto in Car by Model Year of Primary Vehicle



Base: Age 18+ who have driven or ridden in a car in the last month

■ Apple Car Play ■ Android Auto



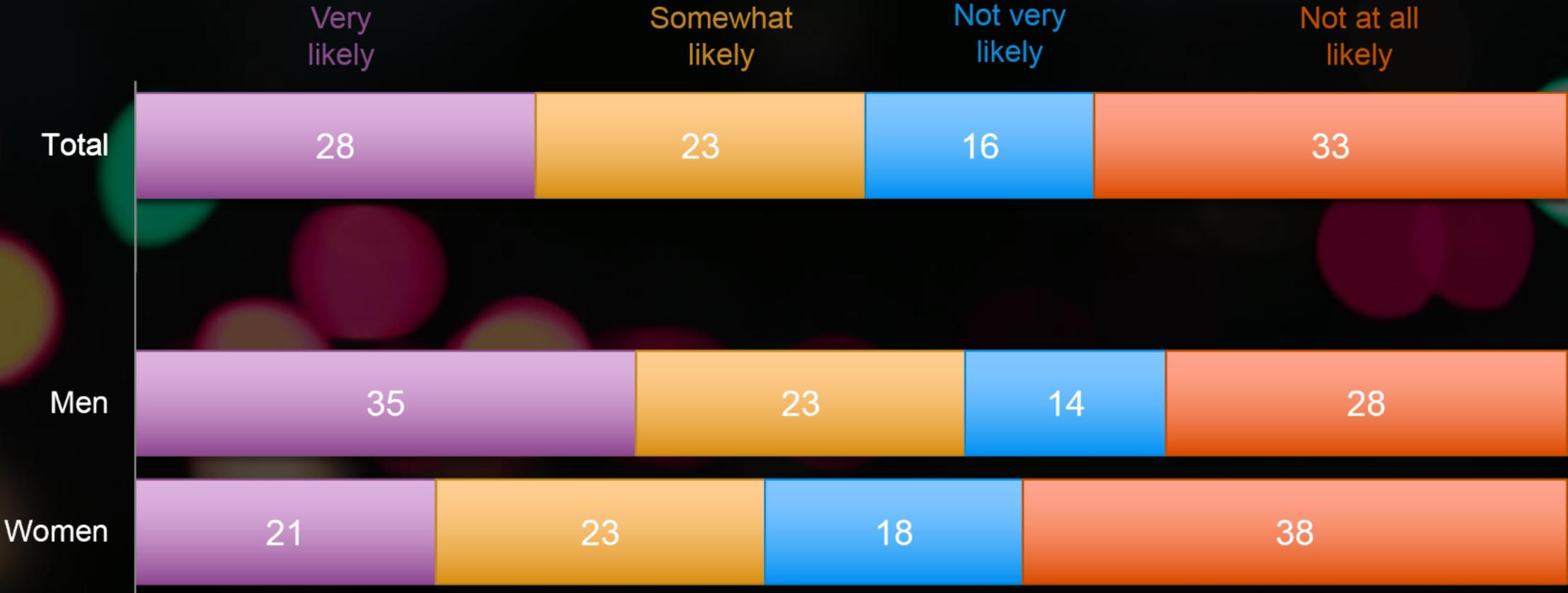
% saying "yes"

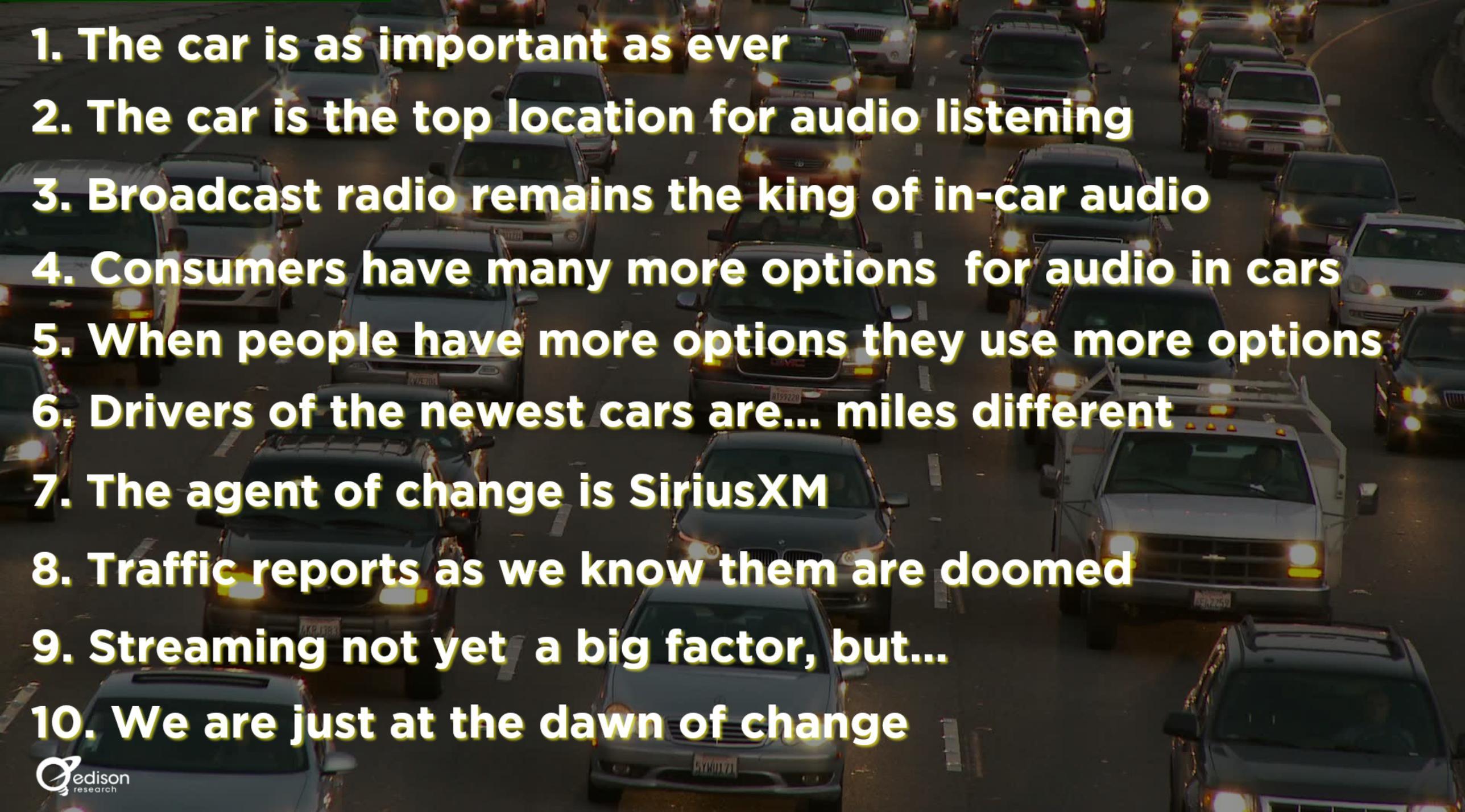




**10. We are just at  
the dawn of change**

# How likely would you be to accept a ride in a self-driving car today?



- 
- 1. The car is as important as ever**
  - 2. The car is the top location for audio listening**
  - 3. Broadcast radio remains the king of in-car audio**
  - 4. Consumers have many more options for audio in cars**
  - 5. When people have more options they use more options**
  - 6. Drivers of the newest cars are... miles different**
  - 7. The agent of change is SiriusXM**
  - 8. Traffic reports as we know them are doomed**
  - 9. Streaming not yet a big factor, but...**
  - 10. We are just at the dawn of change**



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