



# The National In-Car Study

## Fighting For the Front Seat Country Edition

Bob Michaels, VP Radio Programming Services



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## How the In-Car Study Was Conducted

### **1,505 telephone interviews were conducted in July 2003**

- National U.S. random sample
- Spring 2003 Arbitron diarykeepers age 12+
- 98.4% of the sample had driven or ridden as a passenger in non-public transportation vehicles (car/truck/van, etc.) in the last month
- 12% of the sample were P1 to a Country station (n=176)



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## Questions About In-Car Listening

- How important is in-car listening to overall radio listening?
- Is radio losing ground in-car? Are satellite radio and other new devices impacting AM/FM radio?
- Is in-car listening only a major-market concern?
- How important are presets to in-car listening?



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## Questions About In-Car Listening

(continued)

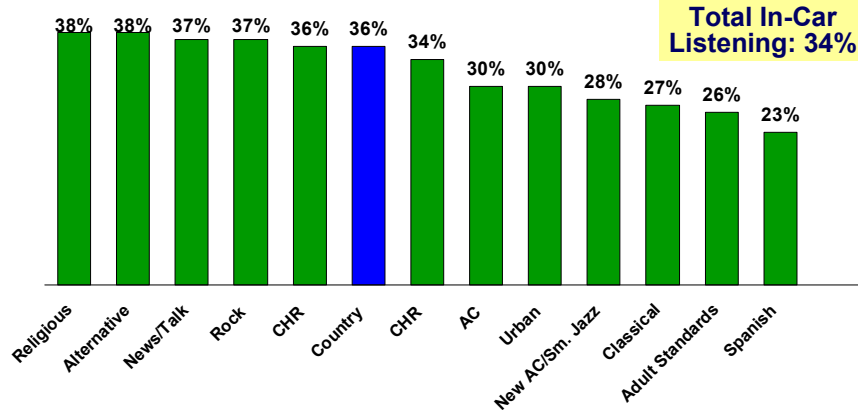
- How high of a priority should traffic reports be?
- How valuable is the in-car listener to advertisers?
- How large an impact is cell phone use having on in-car radio listening?
- Can radio defend its turf?



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# In-Car Listening Is Vital to the Country Format

% of Total Listening Done In-Car



Total In-Car Listening: 34%

Monday-Sunday 6AM-12Mid  
Spring 2003

Base: Total Population 12+



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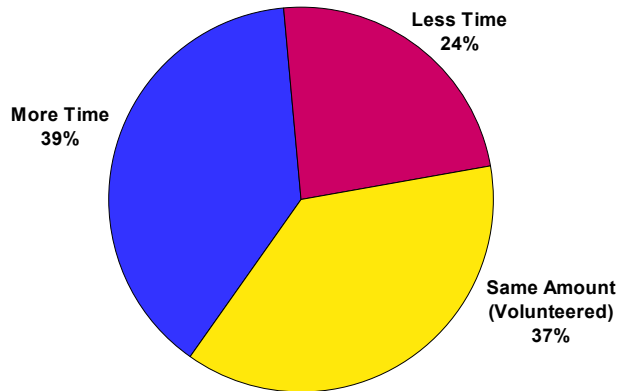
# In-Car Trends



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# Americans Are Spending More Time In-Car

"In general, are you spending MORE or LESS time in cars than you were one year ago?"



Base: Driven/Ridden In a Car in Last Month (Total Sample)

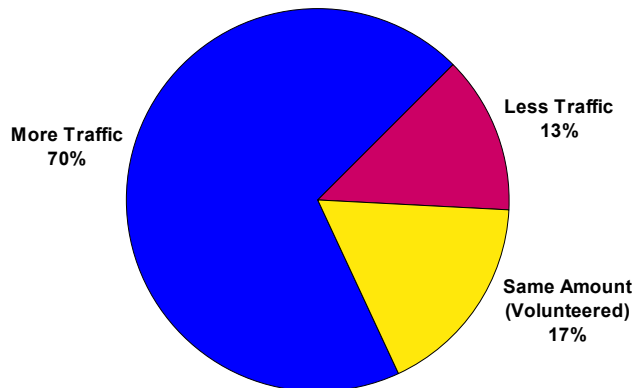


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# Traffic Is Getting Worse

"Would you say you personally are encountering MORE TRAFFIC or LESS TRAFFIC than you were one year ago?"



Base: Driven/Ridden In a Car in Last Month (Total Sample)

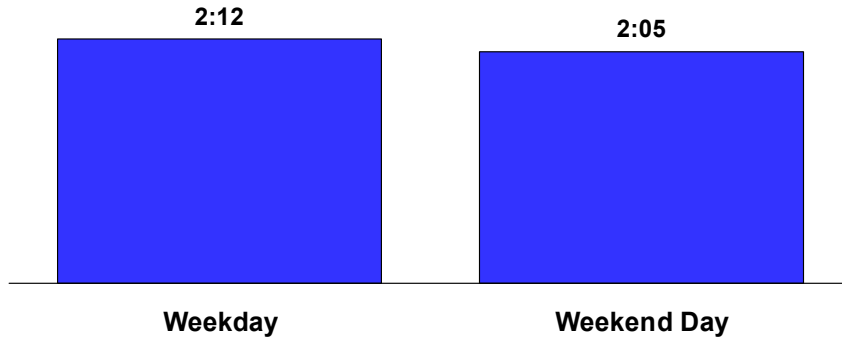


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# Nearly as Much Time Spent In-Car on Weekends as Weekdays

Time Spent In-Car (as Driver or Passenger) Per...  
(Hours:Minutes)



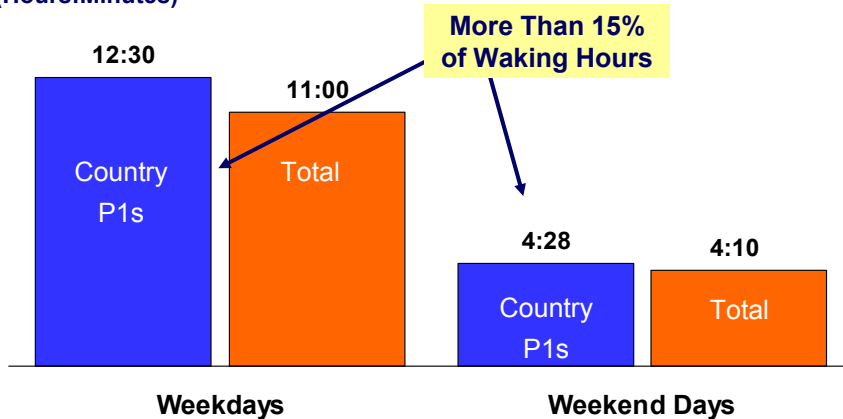
Base: Total Sample



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# On Average, Country P1s Spend Nearly 17 Hours Per Week In-Car

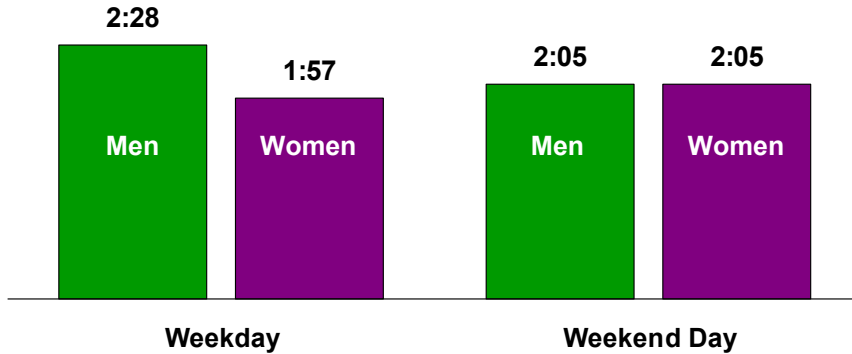
Total Time Spent In-Car (as Driver or Passenger) During...  
(Hours:Minutes)



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# Men Report More Time In-Car Than Women During Weekdays

Time Spent In-Car (as Driver or Passenger) Per...  
(Hours:Minutes)



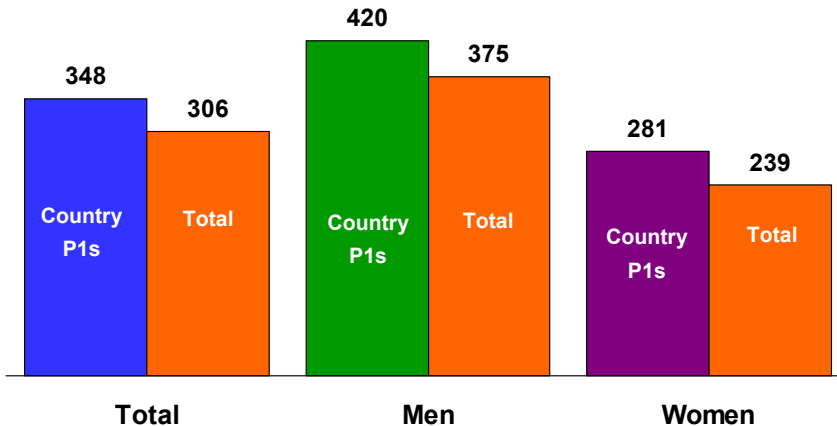
Base: Total Sample



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# People Cover Plenty of Ground In-Car

Miles Traveled In-Car (as Driver or Passenger) in Last Seven Days



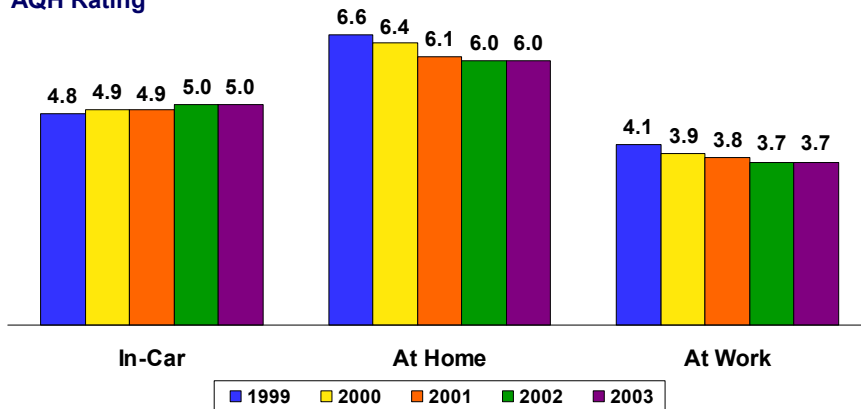
Base: Driven/Ridden In a Car in Last Month



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## In-Car Listening Up, While Home and Work Listening Decrease...

AQH Rating\*



Monday-Sunday 6AM-12Mid

\* Rating based upon all continuously measured markets

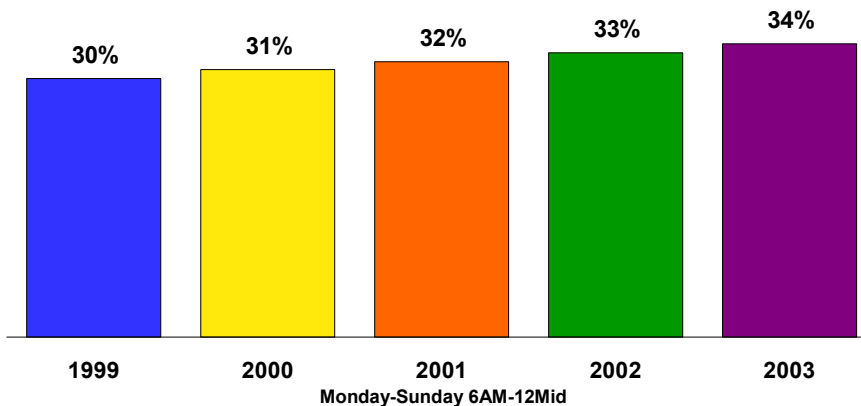
Base: Total Population 12+



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## ...As a Result, In-Car Listening Is Gaining as Percent of Total Listening

% of Total Listening Done In-Car



Monday-Sunday 6AM-12Mid

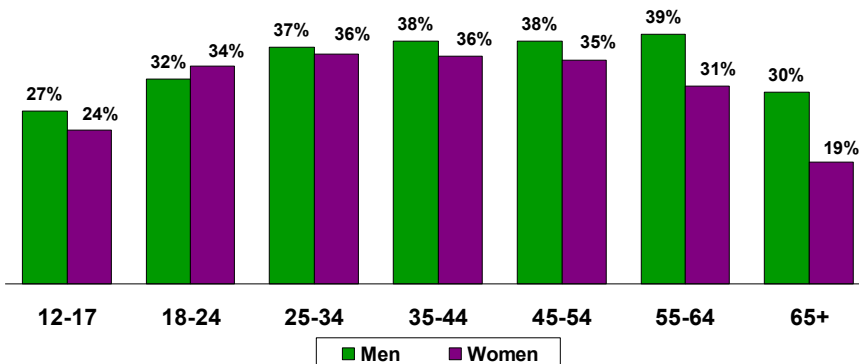
Base: Total Population 12+



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# Men Are Heavier In-Car Radio Users Than Women

% of All AQH In-Car by Demo



Monday-Sunday 6AM-12Mid

Base: Total Population 12+



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# In-Car Listening Is NOT Only a Major-Market Concern

% of Total Radio Listening Done In-Car

1. Fredericksburg, VA	44%
2. Sussex, NJ	44%
3. Raleigh-Durham, NC	42%
4. Nashville, TN	42%
5. Ann Arbor, MI	42%
6. Frederick, MD	42%
7. Columbia, SC	41%
8. Danbury, CT	41%
9. Charlotte-Gastonia-Rock Hill, NC	41%
10. Portsmouth-Dover-Rochester, ME	41%
205. Los Angeles, CA	32%

Monday-Sunday 6AM-12Mid  
Spring 2003



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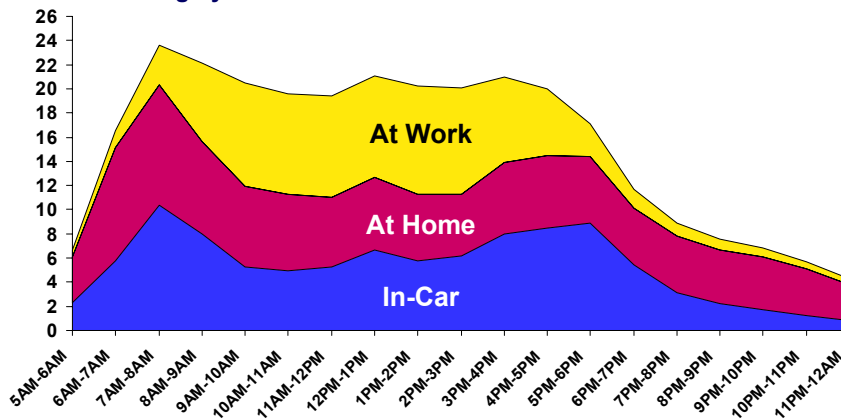
# Work Commute: When Is *Drive Time*?



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# Audiences Move Through the Course of a Day

Total AQH Rating by Hour



Monday-Friday 6AM-12Mid  
Spring 2003

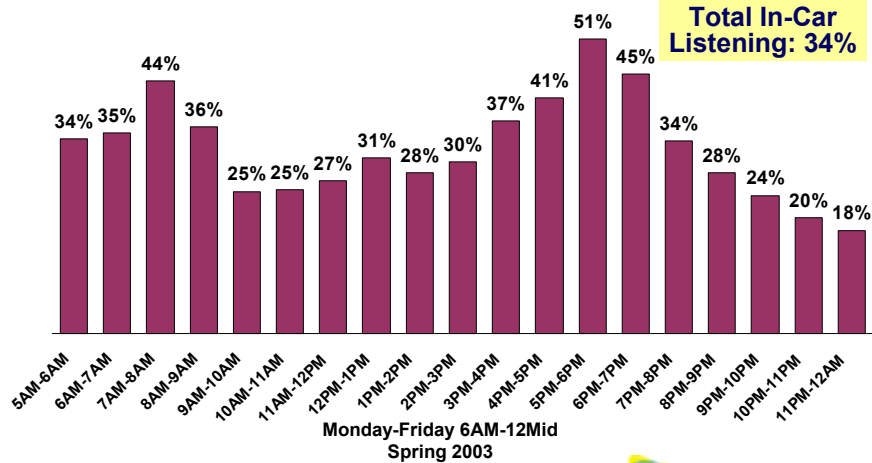
Base: Total Population 12+



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# In-Car Is More Than Half of All Listening from 5PM to 6PM

% of In-Car Listening by Hour



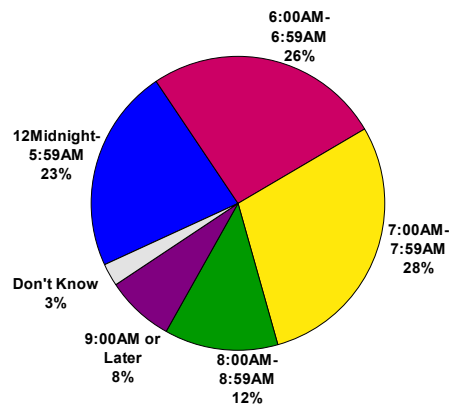
Base: Total Population 12+



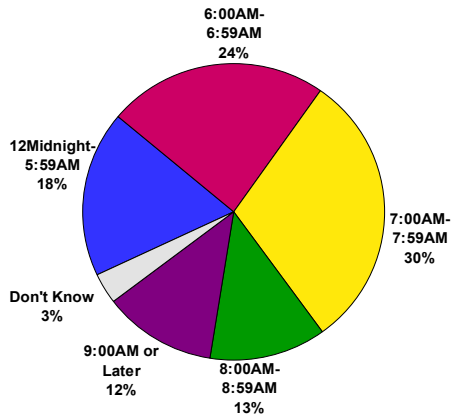
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# More Than Half of Workers' Drive Time Is Over Before 8AM

"What time do you usually leave home to go to your primary job?"



"What time do you usually arrive at your primary job?"



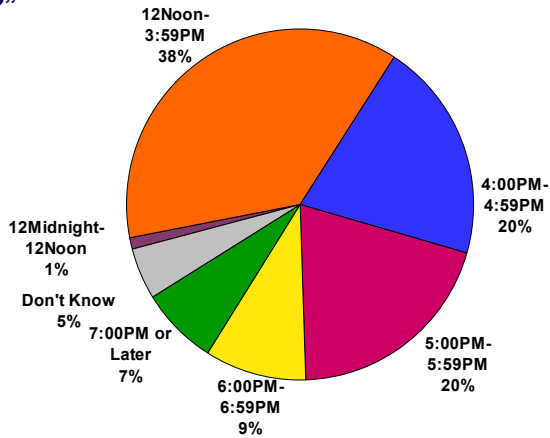
Base: Country P1s who Work Outside the Home



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# Nearly Six in Ten Workers Leave Work Before the “Five O’Clock Whistle”

“What time do you usually leave your primary job at the end of the workday?”



Base: Country P1s who Work Outside the Home



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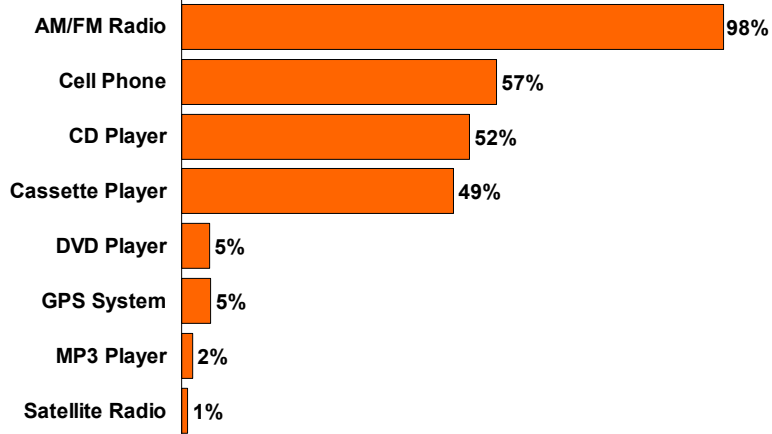
# Defending the Turf



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# Radio Reigns In-Car

## % Using Device In-Car



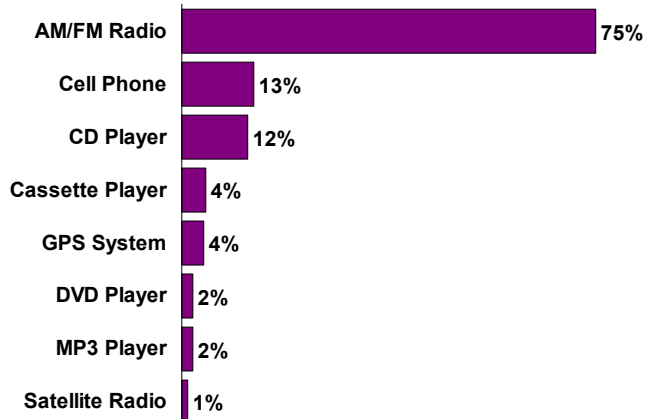
Base: Country P1s who Have Driven/Ridden In a Car in Last Month



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# Radio Is Overwhelmingly the Device Most Used In-Car

## % Using Device In-Car Almost All or Most of the Times In-Car



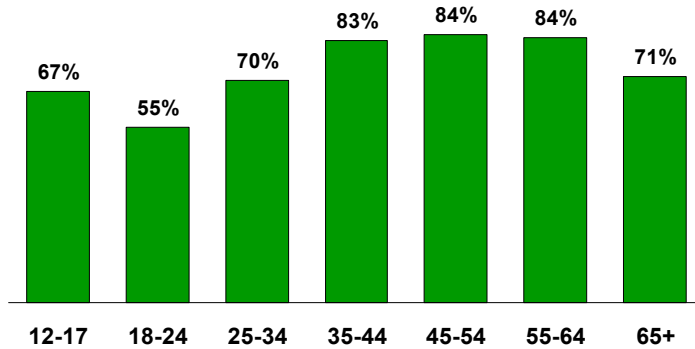
Base: Country P1s who Have Driven/Ridden In a Car in Last Month



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# But All Is Not Well—Radio Is Less Dominant In-Car Among 12-24s

% Spending Most Time with Radio In-Car



Base: Driven/Ridden In a Car in Last Month (Total Sample)

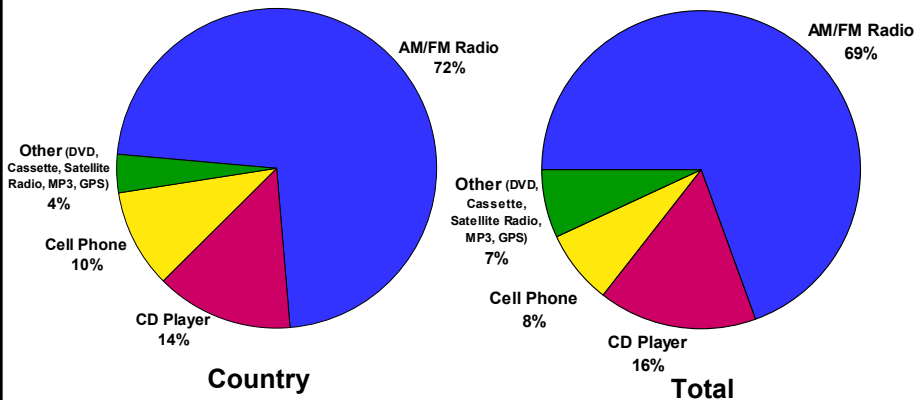


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# Radio Is Most Essential In-Car Device for a Large Majority

“If you could ONLY EVER use ONE device in your primary car, which one device would you choose?”



Base: Driven/Ridden In a Car in Last Month

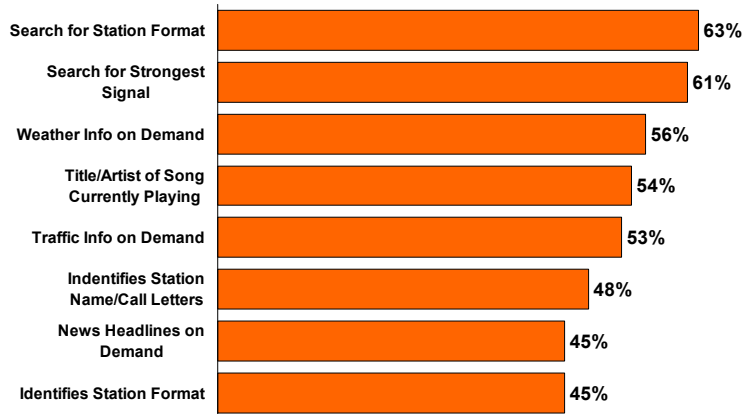


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# High Interest in Current and Future Radio Display Technologies

% "Very" or "Somewhat" Interested in Car Radio Display Function



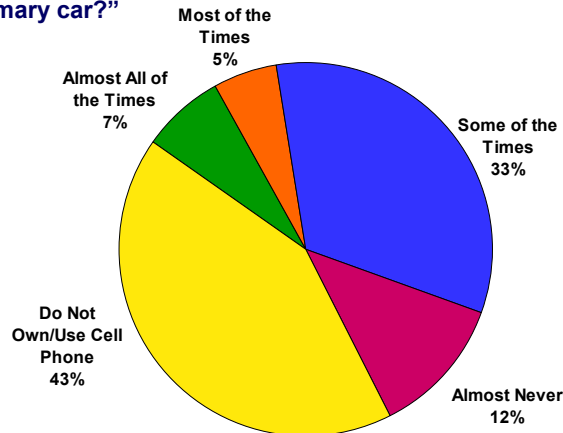
Base: Country P1s



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# Only a Small Fraction Regularly Use Cell Phone While In-Car

"How often do you use a cell phone while driving or riding as a passenger in your primary car?"



Base: Country P1s who Have Driven/Ridden In a Car in Last Month



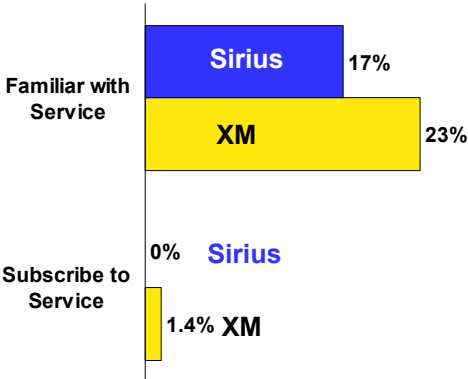
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# Satellite Radio



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## Satellite Radio Familiarity Has Not Yet Translated into Mass Subscriptions



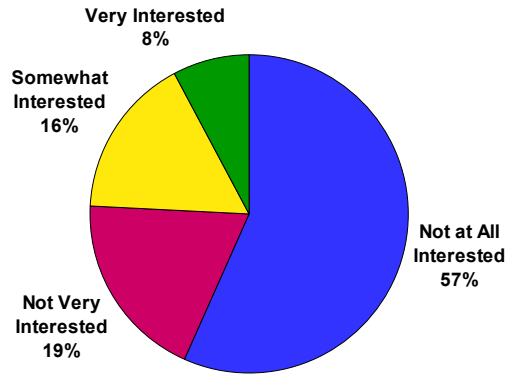
Base: Country P1s



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# Almost One-Quarter Indicate Interest in Satellite Radio

“How interested would you be in a new service that provides digital audio from a satellite directly to your car all over the USA?”



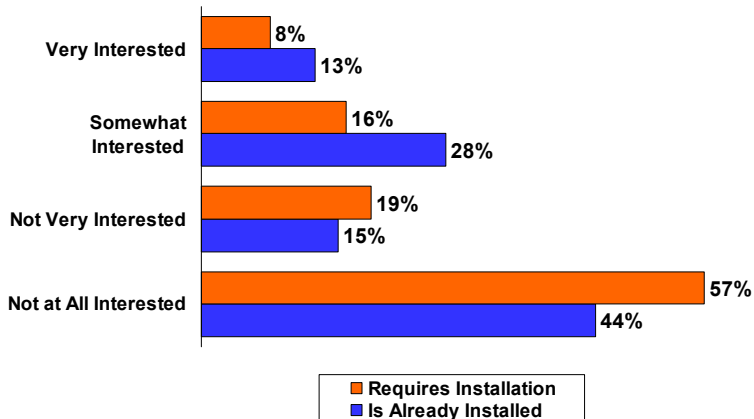
Base: Country P1s



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# Interest in Satellite Radio Increases with Preinstall Option

Interest Level in Satellite Radio Which...



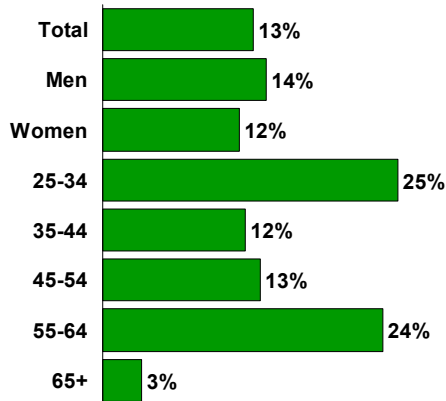
Base: Country P1s



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## Interest in Satellite Radio Highest Among 25-34s and 55-64s

% "Very Interested" in Satellite Radio with Receiver Already Installed In-Car



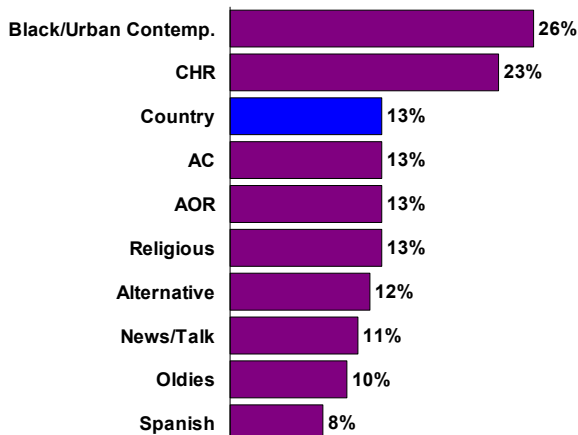
Base: Country P1s



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## Widely Varying Interest in Satellite Radio by Format Preference

% "Very Interested" in Satellite Radio with Receiver Already Installed In-Car



Base: Total Population 12+



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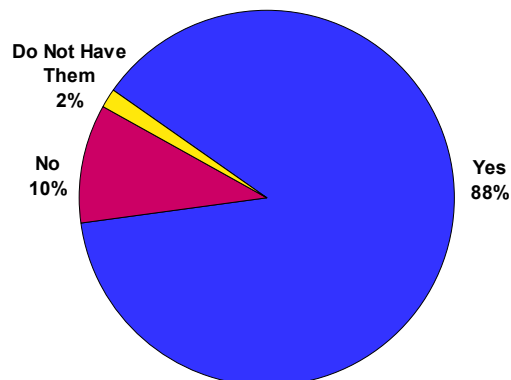
# Radio Preset Buttons



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## Preset Buttons In-Car Are Nearly Universally Programmed

“Are the preset buttons in your primary car programmed/set to specific stations?”



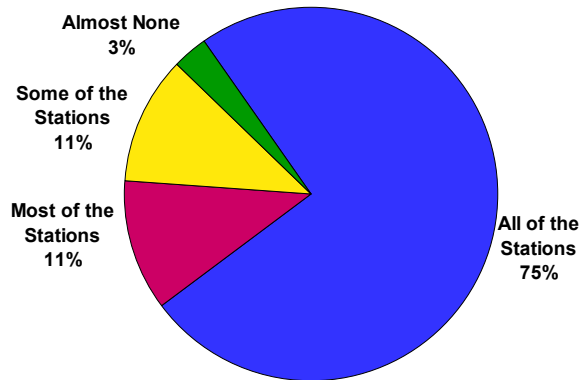
Base: Country P1s who Have Driven/Ridden In a Car in Last Month



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# Almost All In-Car Listening Goes to Preset Radio Stations

“Of the stations you normally listen to on your car radio, how many of those stations are programmed on your car radio preset buttons?”



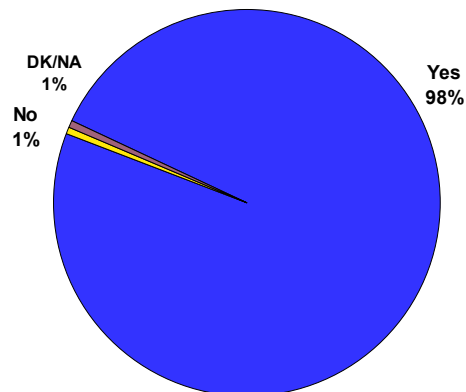
Base: Country P1s who Have Programmed Preset Buttons



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# P1 Stations Are Overwhelmingly Programmed on Preset Buttons

“Thinking about the station you listen to most, is that station programmed on your preset buttons?”



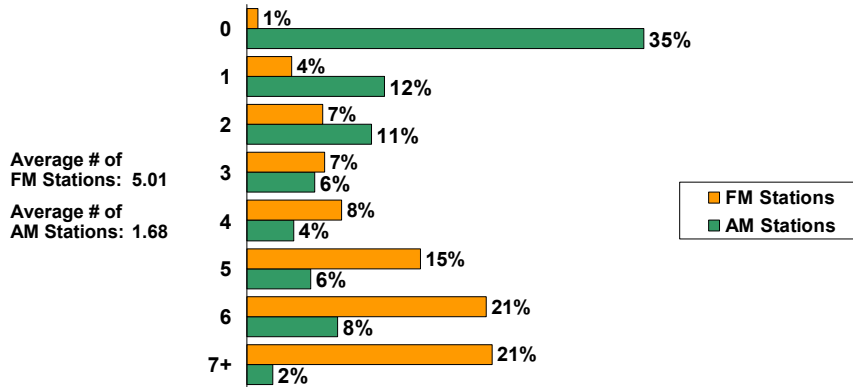
Base: Country P1s who Have Programmed Preset Buttons



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# Preset Buttons Are Programmed to Far More FM Stations Than AM

Number of Preset Stations Reported



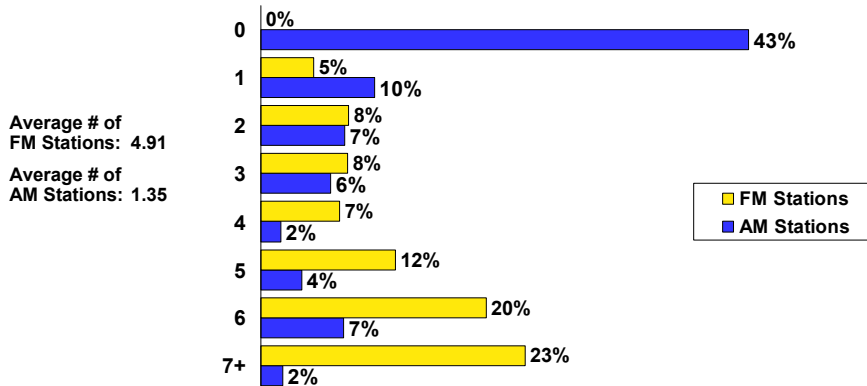
Base: Driven/Ridden In a Car in Last Month (Total Sample)



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# Country P1s Average Nearly Five Preset FM Stations

Number of Preset Stations Reported



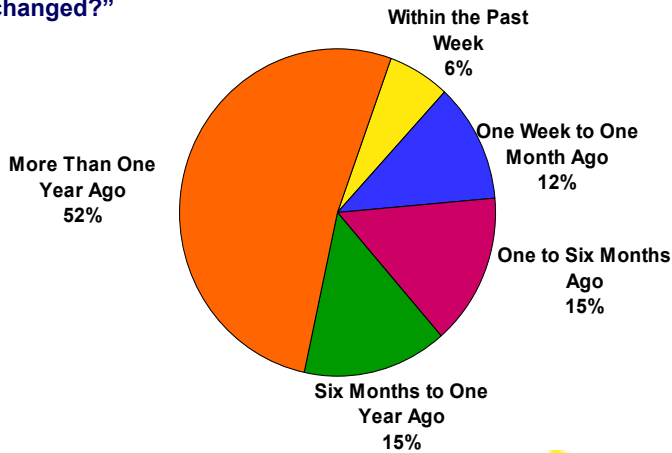
Base: Country P1s who Have Driven/Ridden In a Car in Last Month



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## Most Presets Stay Set

“When was the last time any of the preset buttons on your car radio were changed?”



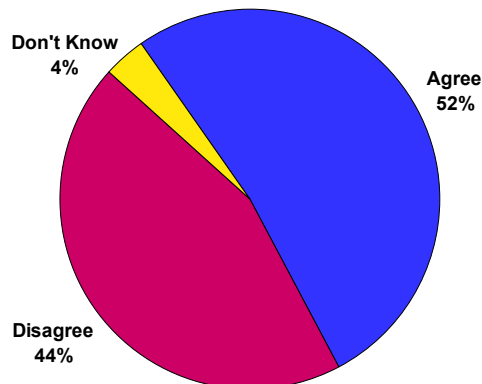
Base: Country P1s who Have Programmed Preset Buttons



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## Once Programmed, Most Agree It Is Not Worth the Hassle to Change Preset Buttons

“Agree or disagree: Once you have the preset buttons programmed, it’s not worth the hassle to change them again.”



Base: Country P1s who Have Programmed Preset Buttons

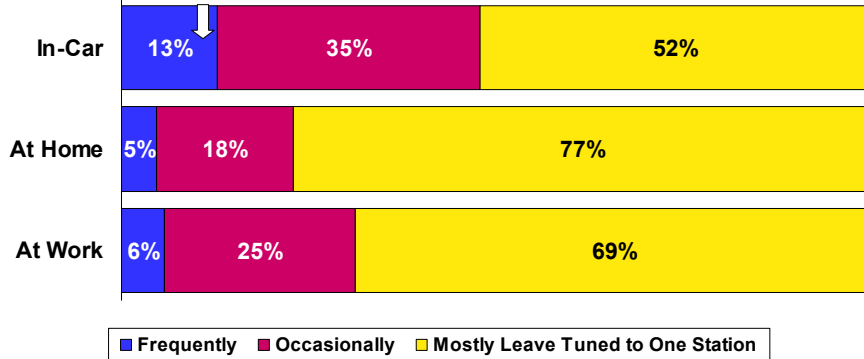


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# Those In-Car Change the Radio Station Most Often

## Frequency of Changing Radio Station in Each Location

Only 13% of Country-radio in-car listeners change stations frequently versus 37% of all in-car listeners



Base: Country P1s who Listen to Radio in Each Location



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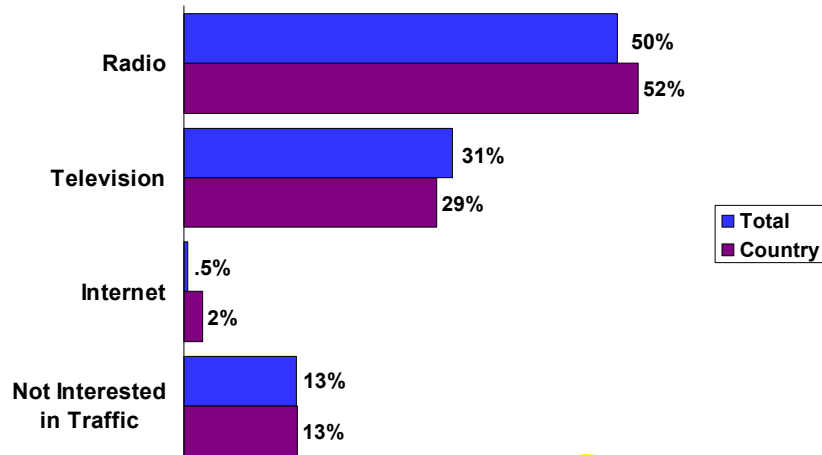
# Traffic Reports



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## Almost One-Third of Consumers Go to Television for the Latest Traffic

“When you want the latest traffic information, where do you go first?”



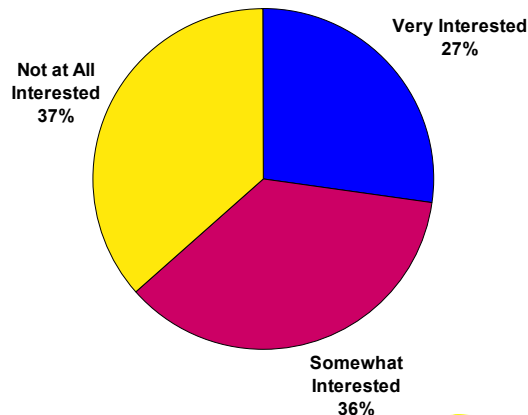
Base: Driven/Ridden In a Car in Last Month



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## Nearly Two-Thirds Are at Least Somewhat Interested in Rush Hour Traffic Reports

“How interested are you in hearing traffic reports during time periods when there is heavy traffic on the roads, such as rush hours?”



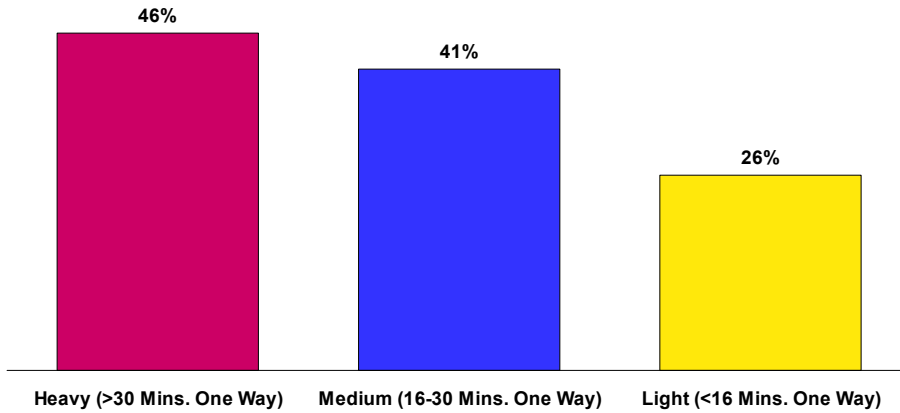
Base: Country P1s who Have Heard Radio Traffic Report in Last Month



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# Heavy Commuters More Likely to be Interested in Traffic Reports Than Light

% "Very Interested" in Traffic Reports During Rush Hours



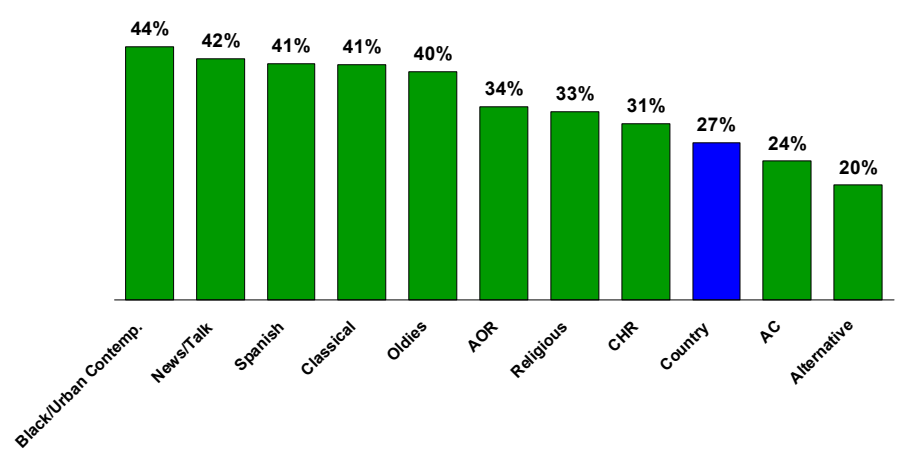
Base: Have Heard Radio Traffic Report in Last Month (Total Sample)



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# Which Format's Listeners Care Most About Traffic Reports?

% "Very Interested" in Traffic Reports During Rush Hours



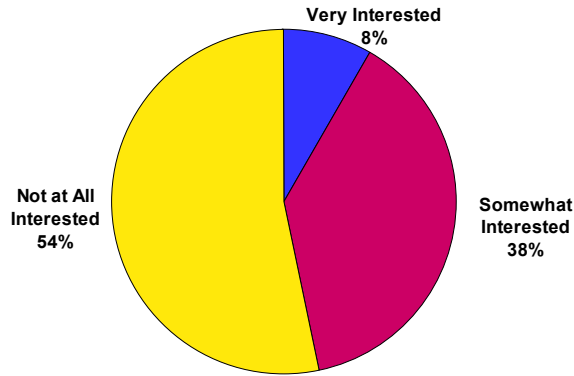
Base: Have Heard Radio Traffic Report in Last Month



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## Nearly Half of Listeners Have Interest in Traffic Reports Outside of Rush Hours

“How interested are you in hearing traffic reports during time periods OTHER THAN rush hours?”



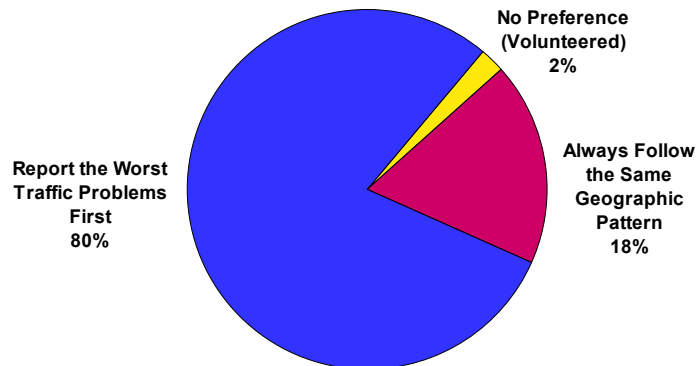
Base: Country P1s who Have Heard Radio Traffic Report in Last Month



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## Listeners Care About the Structure of Radio Traffic Reports

“Different radio stations report traffic problems in different ways. In your opinion, how should traffic be reported on the radio?”



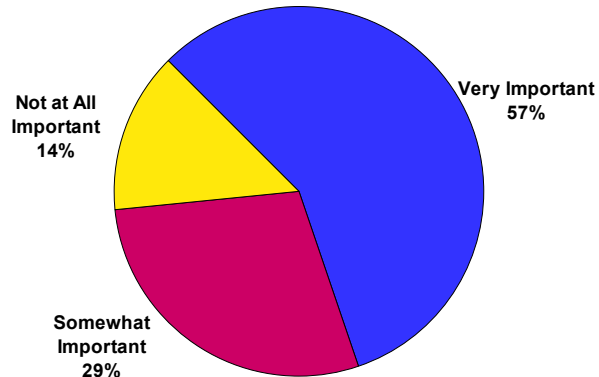
Base: Country P1s who Have Heard Radio Traffic Report in Last Month



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## Listeners Want to Know the Best Ways to Avoid Traffic Problems

“How important is it that traffic reporters tell you about alternate routes when there are problems on the road?”



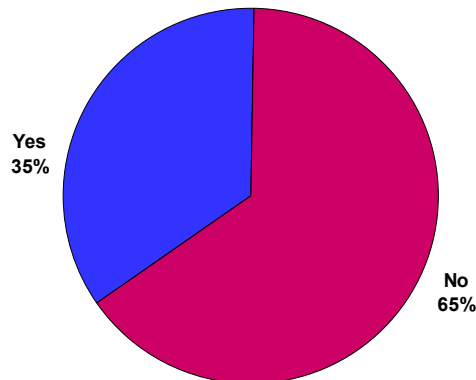
Base: Country P1s who Have Heard Radio Traffic Report in Last Month



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## More Than One-Third Have Changed Stations to Find Traffic Reports

“Have you ever changed the radio station you were listening to in order to find a traffic report?”



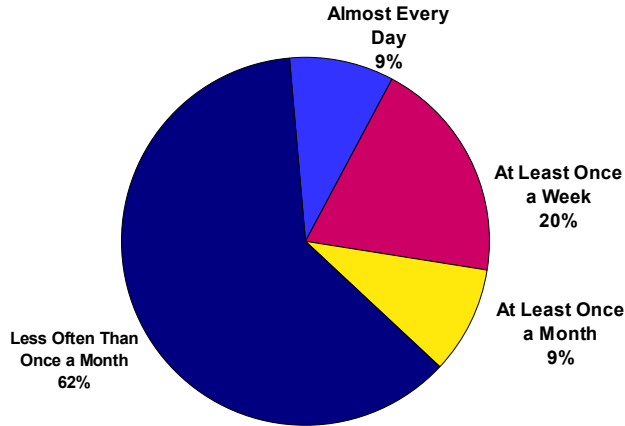
Base: Country P1s who Have Heard Radio Traffic Report in Last Month



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# Country P1s Often Use Radio Traffic Reports to Select Their Route

“How often do you select or confirm your route based on a traffic report on the radio?”



Base: Country P1s who Have Heard Radio Traffic Report in Last Month



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# In-Car Buying Decisions



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# Exploring the Power of Recency for In-Car Advertising

- **Recency** planning starts with the idea that *when* is the critical variable rather than *how many*—in other words, advertising effects can also be controlled by *when* the message is received.

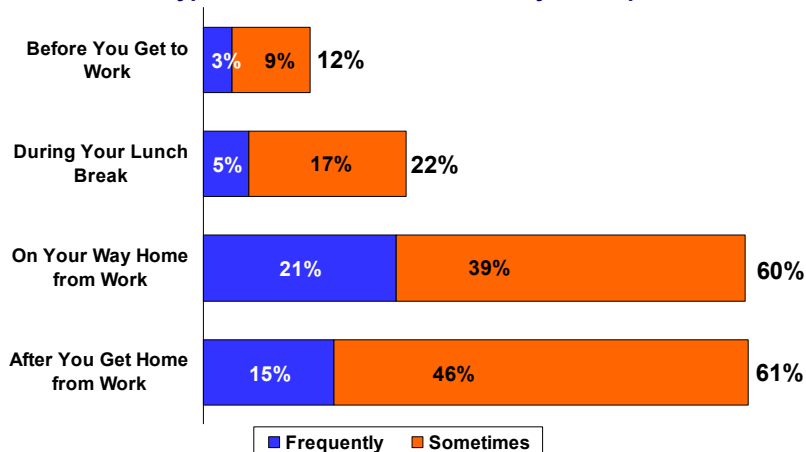
How Important Is It to Reach a Consumer in the Car?



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# Targeting Consumer Close to Purchase? The Real Value Is in the PM

“In the course of a typical workweek, how often do you shop...?”



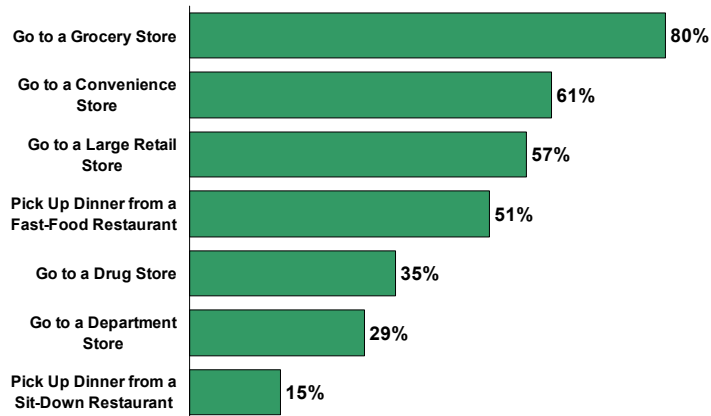
Base: Country P1s who Work Full/Part Time



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# Workers Make Many Stops on the Commute Home

“In the last month, have you stopped on your way home from work to...?”



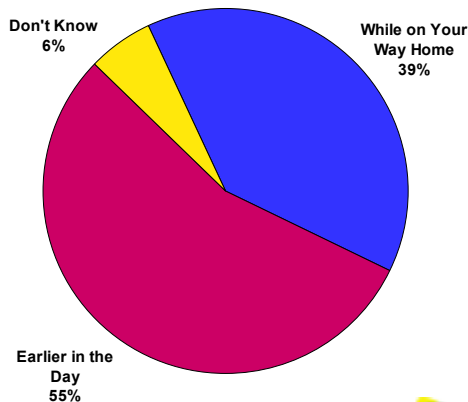
Base: Country P1s who Work Full/Part Time



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# Two Out of Five Consumers Don't Make the Decision to Shop Until the Last Minute

“In general, when do you usually make the decision to stop at a store on your way home from work?”



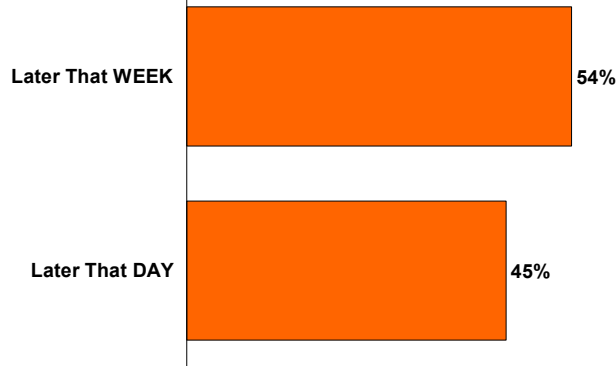
Base: Country P1s who Work Full/Part Time



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## In-Car Commercials Can Deliver Immediate Results for an Advertiser

“While listening to the radio while in a car, have you ever heard of a sale or special that motivated you to visit a certain store...?”



% Saying "Yes"

Base: Country P1s



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## Who Is the Heavy In-Car Consumer?

Category	Index
\$100K+ HH Income	142
In-Car Radio Listening (Quarter-Hours)	137
Male	131
Age 35-54	131
Four-Year Degree or Higher Education	112
TV Time Spent Viewing	92



Base: Drive/Ride in Car More than 260 Miles Per Week



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# Recommendations/ Issues to Consider



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## Recommendations/ Issues to Consider

### 1. In-car listening is important to all stations

- Large and small markets
- All formats



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## Recommendations/ Issues to Consider

### 2. Know the in-car listening patterns of your market and your audience

Stations in markets with especially heavy in-car listening might need to rethink their strategies:

- Traffic report implications
- The way your station programs its stop sets



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## Recommendations/ Issues to Consider

### 3. Consider radio preset button strategies

- Most people seldom change their preset buttons
- Almost all in-car listening is to preset stations
- What has your station done to get listeners to give you a preset (especially after a format change)?
- Consider creative preset strategies (e.g., potential partnerships with local car dealerships?)



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## Recommendations/ Issues to Consider

### **4. Sales staffs need to promote to advertisers the concept of shopping “prime time”**

Take advantage of the fact that many are shopping on their way home from work. Consider strategies to help advertisers target the in-car listener and after-work shopper.



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## Recommendations/ Issues to Consider

### **5. Radio must increase its investment in in-car technology to defend its turf**

RDS allows your station to tell listeners the name of the song, to provide news or traffic information, and to increase the service you provide your listeners.



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## Recommendations/ Issues to Consider

### 6. Advertisers should target radio more aggressively

People are spending more and more time in cars. We need to get the word out to advertisers that Country radio directly targets people in this location.



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# The National In-Car Study

Fighting For the Front Seat  
**Country Edition**

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