

Informa Tech Automotive Group



The Future of Infotainment: A Radio-Centric Approach

Sponsored By: Xperi

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Today's Speakers



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Agenda

- Introduction
- Xperi presentation
 - Content is king
 - Delivery
 - Innovation
- Q&A

Infotainment Market

- 3 billion people worldwide listen to radio weekly.
- DAB, DAB+ and HD Radio have a significant experience gap to streaming content.
- \$40 billion global radio market
- 2018 U.K. study, radio advertising the second-best ROI for brand building.
- 4G smartphones ushered in mobile streaming and video
- 41% of U.S users have listened to online radio using a smartphone connected to the vehicle audio system



The Emergence Of Hybrid Radio

In the 13 years since the project launched, RadioDNS had continually defined and published technical specifications in support of hybrid radio

2008

- In 2008 RadioDNS created linking broadcast radio with the Internet and web services.

2010

- In 2010, UK Radioplayer Ltd, formed to develop a unified streaming solution and specification for desktop web playback.

2015

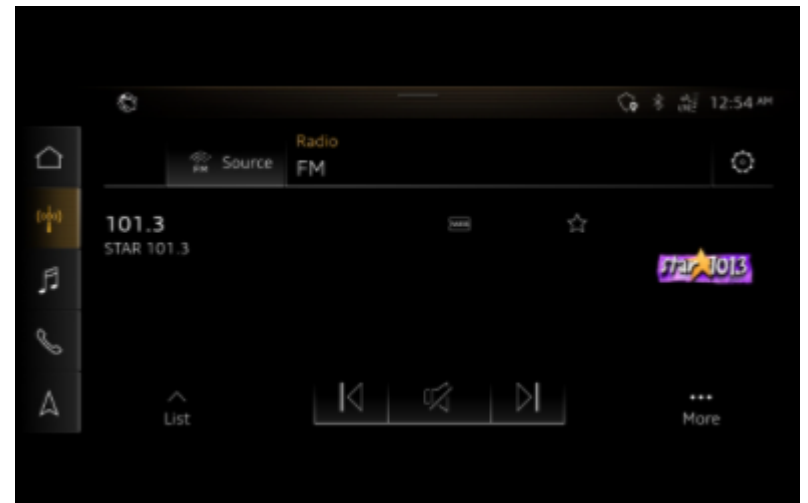
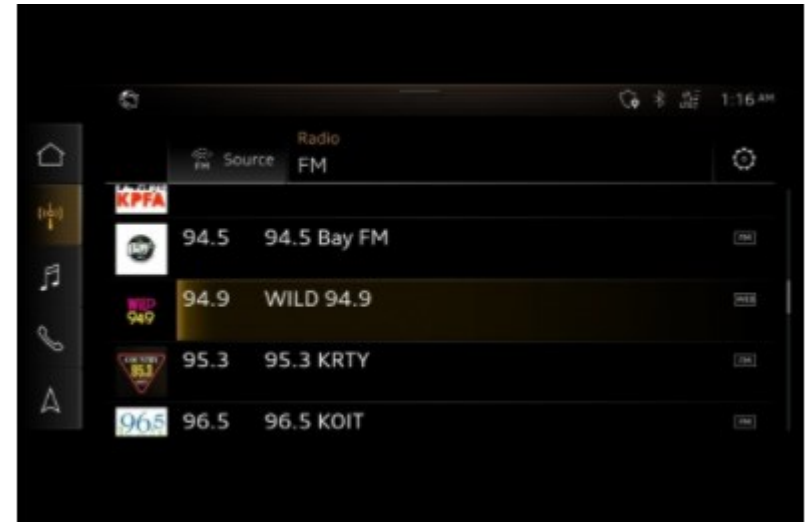
- In 2015 ETSI published two standards documents.

2020

- Radioplayer now has coverage in 14 countries, and recently announced service will be launched in additional European countries in 2021

2021

- Audi of America introduces hybrid radio as part of its Generation 3 infotainment



Current State Of Play

- Incubation and development of hybrid radio is slow.
- Difficult to discover availability through web searches and public records.
- RadioDNS Project Logo identifies 26 countries that are providing or intending to provide metadata.
- Real coverage in terms of additional content is patchy, even in markets such as the U.K. and Germany.

COUNTRY	Radioplayer Operational in 2020	Number of Broadcasters	Numbers of stations	Avg % Listening
U.S.		6	1682	45.42%
UK	Y	4	449	23.95%
Germany	Y	3	288	31.93%
France	Y	4	139	11.15%
Canada	Y	1	105	
Ireland	Y	2	34	46.95%
Australia		3	31	90%
The Netherlands	Y	2	23	19.60%
Norway	Y	3	23	61.90%
Czech Republic		1	22	22.40%
Switzerland	Y	5	22	41.63%
Spain	Y	5	19	15.26%
Austria	Y	2	13	42.50%
Belgium	Y	2	13	49.20%
Denmark	Y	2	11	37.30%
Poland		1	8	15.90%
Turkey		1	8	7.00%
Italy	Y	2	7	11.60%
Slovenia		2	7	15.25%
Russia		1	5	13.10%
Hungary		1	3	42.00%
Iceland		1	3	50.40%
Finland		2	2	68.25%
Sweden	Y	2	2	44.85%
Romania		1	1	28.10%
United Arab Emirates		1	1	49.80%
Project Logo summary		60	2921	35.28%

Current State Of Play _ Reality Check

An analysis of 22 global cities, using the Xperi DTS AutoStage simulator

For DTS AutoStage the number of stations that have genres, logos and station names metadata is almost 100% compared to a sub-20% in a RadioDNS-enabled radio.

Hybrid Radio Metadata Elements	DTS AutoStage	RadioDNS	Difference
Genres	99%	8%	91%
Logo	98%	18%	80%
Station Name	100%	19%	81%
Phone	73%	1%	73%
Email	71%	0%	71%
Slogan	79%	16%	63%
Description	68%	17%	52%
Long Description	52%	9%	43%

Xperi has a database of global radio stations and utilizes the program information (PI) and station identification (SID) codes in the broadcast frequency, to determine which have RadioDNS information.

Comparison of metadata elements in the DTS AutoStage system, compared to a RadioDNS-enabled vehicle receiver.

Opportunities & Challenges

Opportunities

- Retaining consumers who listen to radio in-vehicle
- Sustaining the infotainment unit as the central feature of the dash
- Converting user activity into engagement.
- Creating a gateway to monetization of services,
- Insight into anonymized driver and passenger behavior data.

Challenges

- Balancing risk of partnering versus accelerating time-to-market and consumer adoption.
- Overcoming early-stage commercial challenges of winning the acceptance of the customer.
- Defining a user experience that enhances brand credibility of all partners with limited suboptimization on premium vehicles and reduced cost impact on lower tier vehicles.

Poll question

When do you believe hybrid radio will be included in 25% of new vehicle shipped?

1. 2023
2. 2025
3. 2030
4. Later than 2030
5. Never



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Bob Dillon

 **Q&A**