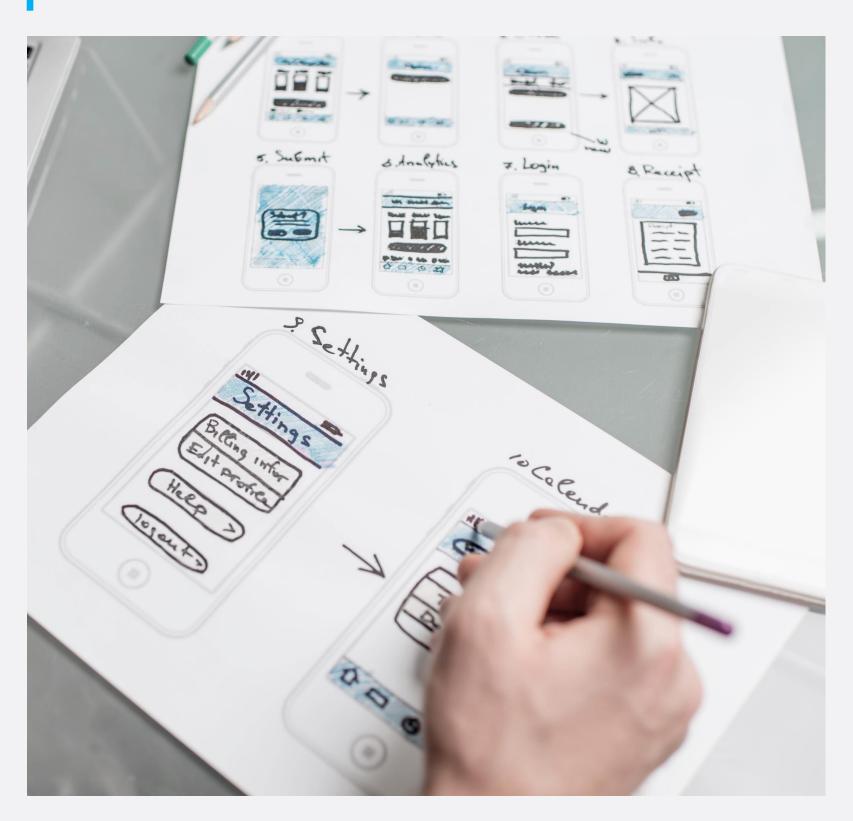


SiriusXM Connected Vehicle Services in the SXM Ecosphere



- Launched the first telematics program Lincoln RESCU in 1996
- Launched 6 different OEM programs in the last 24 months
- 15 active OEM programs, 450 model lines
- 50 different services in market
- 500 million vehicle interactions in 2018
- 40 million+ CV and Audio subscribers
- More than 70 percent of the North American new vehicle fleet





The Necessity of Interoperability



- Platforms fragmented
- Common interactions do not exist
- Systems integration complexity
- Proprietary "markets" impeding growth



Extreme complexity for Simple Tasks

- 190 specific OEM products tested annually
- Hundreds of variants in software, hardware
- Over 500 tests, 232 certifications
- Contrast to wireless devices
- Steep challenge in how to scale





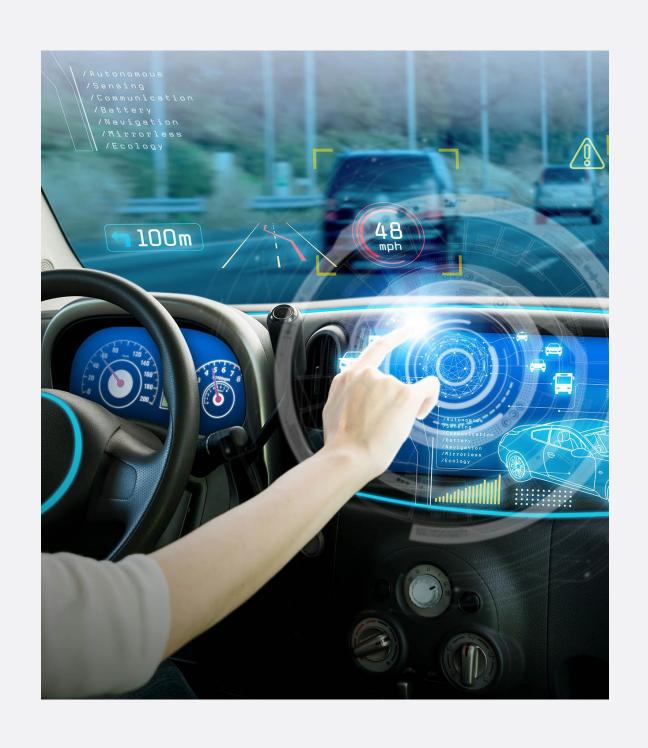








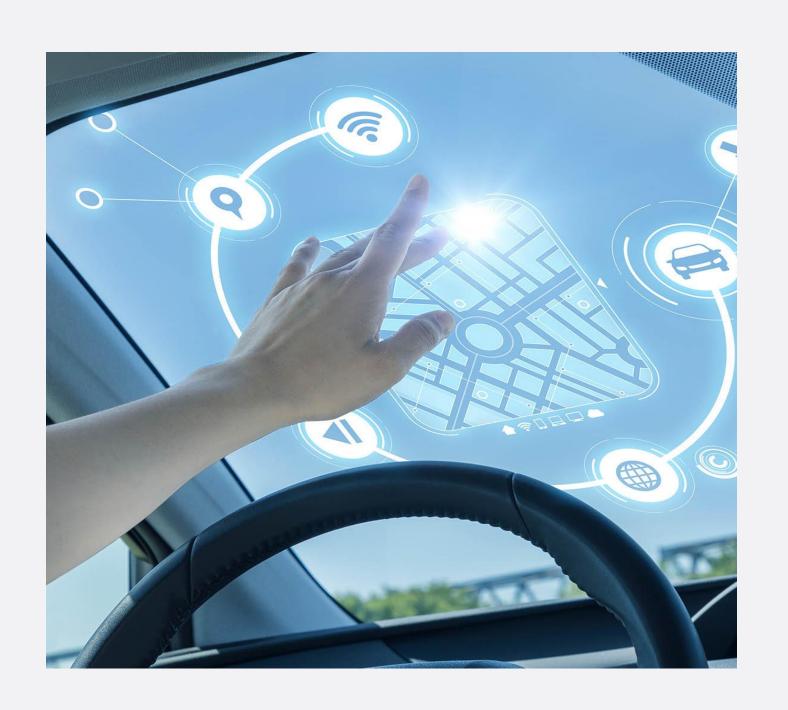
The Necessity of Meeting Consumer Expectations



- Benchmarked with smartphone experience
- Communicating with car in real-time
- Data coming out of the car
- Consumer Control



The Necessity for Consumer-Centric Design



- Must deliver "the Magic Moment"
- Optimized for safety, convenience
- Leveraging voice where appropriate
- Highly personalized
- More interaction, based on context, location

