

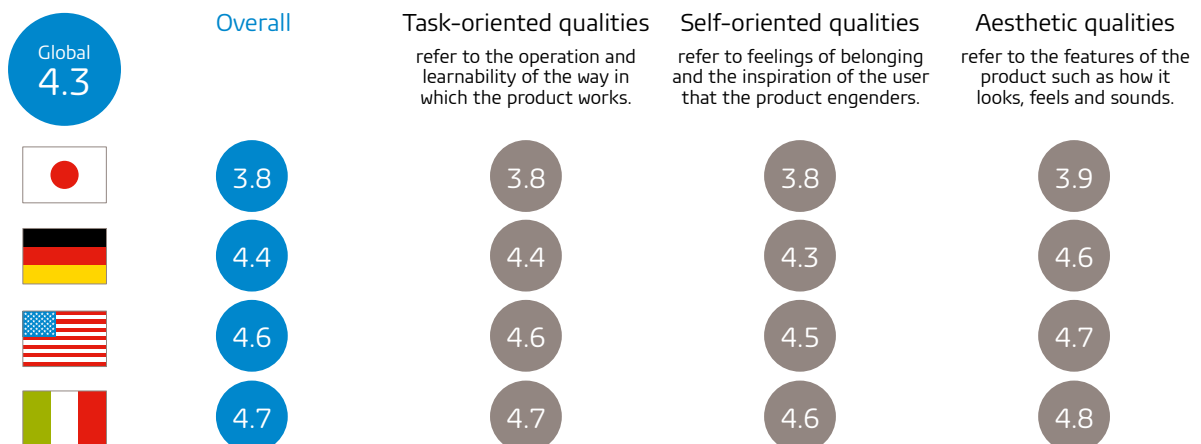


IN-CAR ENTERTAINMENT: WHAT DRIVERS WANT AND EXPECT TOMORROW

In a competitive global marketplace, one key way for auto manufacturers to keep customers satisfied is to anticipate and meet their future wants and desires. The center stack or head unit where that LCD usually lives is an area of amazing innovation in cars at the moment. So just what do drivers think they'll want from their in-car entertainment systems in the future? And how does that differ by market?

GfK's study "How good is your UX?" surveyed drivers in the US, Japan, Germany and Italy on their user experiences with the human-machine interfaces (HMI) for auto infotainment systems. The research incorporated the internationally validated tool (called the UX Score), which breaks down the user experience into three distinct components:

LIX SCORES



Please assess your current car's infotainment system. (We're referring to your manufacturer-installed phone (Bluetooth), satellite-navigation, and/or multimedia player.)
 1 = don't agree at all, 6 = agree completely
 Basis: 3,776 drivers 18+, December 2013: Germany, Italy, Japan, USA
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- » task-oriented qualities (learnability and operability)
- » self-oriented qualities (product fit and inspiration)
- » aesthetic qualities (look and feel).

The global perspective

Overall the UX benchmark globally was 4.3. In Japan it was the lowest in our study at 3.8, with Italy the highest at 4.7.

The first factor we noticed is that, while the automotive business and brands are global, what drivers want from their cars differs by market – sometimes a little but, for some factors, quite significantly. This means car manufacturers need to adapt their models for each country and to do that they need to understand those market differences.

Top three feature requirements about which the different markets agreed

Easy access

No one wants a system they can't figure out or to look stupid as a result. So easy access, systems that are intuitive to use or are voice activated are highly prized.

Color head-up display

This might seem a frivolous concern, but you only need to step into a car with a monochrome or two colour display unit and then in a car with a full color display. It's not about pretty hues, but about how information design really falls into place when colors are used well by designers to delineate what's on the screen.

Infotainment systems compatible with different operating systems

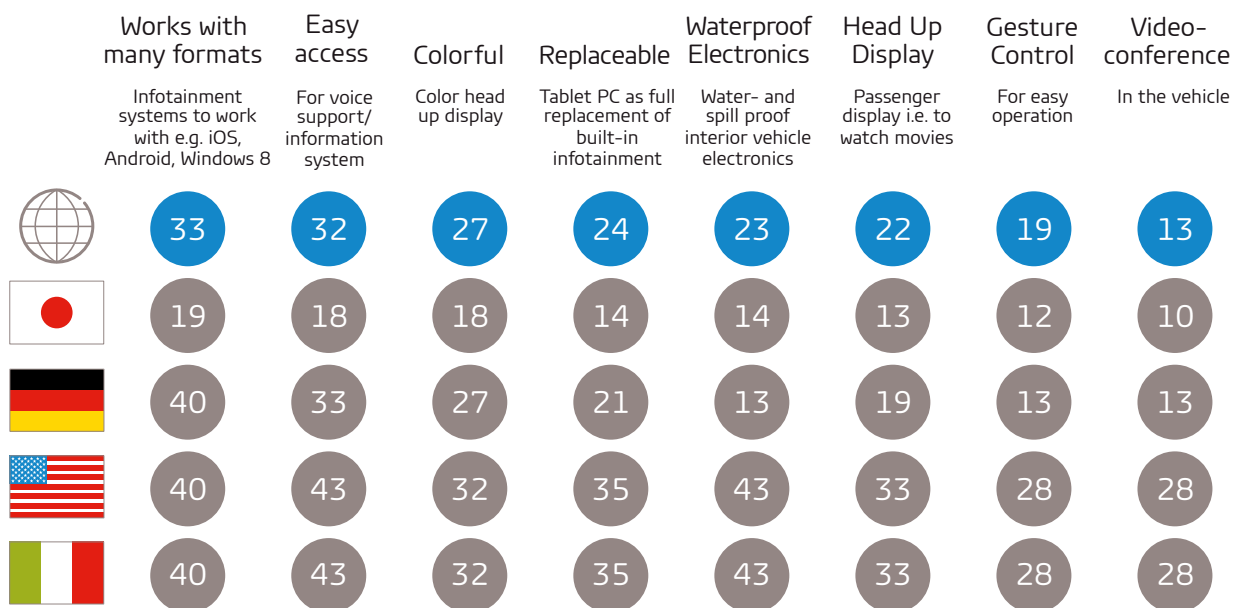
Globally more and more consumers are saying, "I want tech in my car to be compatible with the other devices with different formats like iOS, Android, Windows 8." More and more we want our cars to wrap around our mobile phones.

How needs vary by market

US

Drivers in the US were most likely to give high scores to infotainment systems generally; out of 6, the average UX Score in the US was 4.6, compared to 4.3 globally. They also prized two features more highly than the Germans and Japanese: waterproof/spill-proof interior vehicle electronics and the ability to video conference in-car.

CONSUMERS' INTEREST IN NEW FEATURES (%)



Please indicate how interested you would be in buying that product (can select multiple products) if it were offered for your type of vehicle you plan to purchase next.
Basis: 3,776 drivers 18+, December 2013: Germany, Italy, Japan, USA

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» Drivers and passengers expect to be fully connected to the internet when on the move in order to manage video conferencing and multi-media. With so much of our time spent connected to the web from numerous devices, it's only a matter of time before the car is the next connected space – of course in a safe and user-friendly manner.

Germany

German drivers rated current infotainment systems at 4.4, just over the average score of 4.3. The look, feel and product fit of the car infotainment systems are important to Germans. This shows us that usability is no longer the only measurement to satisfy drivers. While learnability and operability already are important for all car infotainment systems, emotional elements like brand fit and having fun is becoming more relevant in developing digital interfaces.

Two car infotainment features stood out as more desirable than in the US for both the Germans and the Japanese: tablet PC as a full replacement to a built-in infotainment system and passenger head-up display with a functionality that includes watching movies.

Japan

While Japanese drivers valued most highly the same infotainment features as the Germans, they rated current infotainment systems the lowest in the survey.

» Today, drivers experience user-friendly, engaging and attractive technology products and systems in their daily life. Having this in mind, it is easy to understand why they want the same experience in their car. Appealing interfaces like color heads-up displays and the ability to use the infotainment systems with their voice while driving makes the experience more fun and less stressful. We're also seeing that connectivity is the most important topic when developing infotainment systems.

Italy

Overall UX benchmark scores in this study were highest for Italian drivers at 4.7. And more so here than in any other market, there was significant interest in the entire range of new features that respondents were presented with.

Highly desired car infotainment features by the Italian market included waterproof/spill-proof interior vehicle electrics, passenger head-up display with a functionality that includes watching movies, tablet PC as a full replacement to a built-in infotainment system, gesture control and being able to video conference in-car.

» It used to be commonplace for us to update elements of our in-car entertainment systems such as our car stereos – and it is still the case that people want to be able to upgrade certain features without having to buy an entire new car. We think about what's going to be better tomorrow and desire the option of being able to install a better head unit or plug in and display a slick new mobile device.

Our study indicates that the Americans and Italians are more closely aligned in both how they rate current infotainment systems and what they want from tomorrow's car infotainment systems. While the Germans and Japanese have similar wants from future infotainment systems, the Japanese are far harsher critics of the user experience of current systems.

Despite the fact that there is some convergence in opinion, each market has its own wants and desires to which auto manufacturers must be prepared to respond.

About the survey

The UX Score is based on a ten-question survey administered after a user has interacted with a product. The UX Score provides a measure that can be used to track experiences over time, better understand product loyalty or market share, or compare HMIs. We carried out online interviews with 3,776 drivers aged 18 years old and over, across four countries: USA, Japan, Germany and Italy. There were 988 respondents in the USA sample. We executed the fieldwork in December 2013 and weighted the data to be gender and age representative for car drivers with one or more cars in the household within the online population. We presented the research for the first time in June 2014 in Germany. For more information on our UX research, please visit www.gfk.com/solutions/ux/

Turning research into smart business decisions

GfK's automotive industry experts provide insights into today's markets and consumers' demand of tomorrow by looking at consumer, retail and media data. Combining deep global industry skills with proven market research expertise, GfK turns research into smart business decisions for automotive companies to create winning strategies that translate into revenue.

About GfK

GfK is the trusted source of relevant market and consumer information that enables its clients to make smarter decisions. More than 13,000 market research experts combine their passion with GfK's long-standing data science experience. This allows GfK to deliver vital global insights matched with local market intelligence from more than 100 countries. By using innovative technologies and data sciences, GfK turns big data into smart data, enabling its clients to improve their competitive edge and enrich consumers.

QUESTIONS?

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