



THROUGH THE
LOOKING GLASS

Customer Perspective Of In-Car Displays And Systems

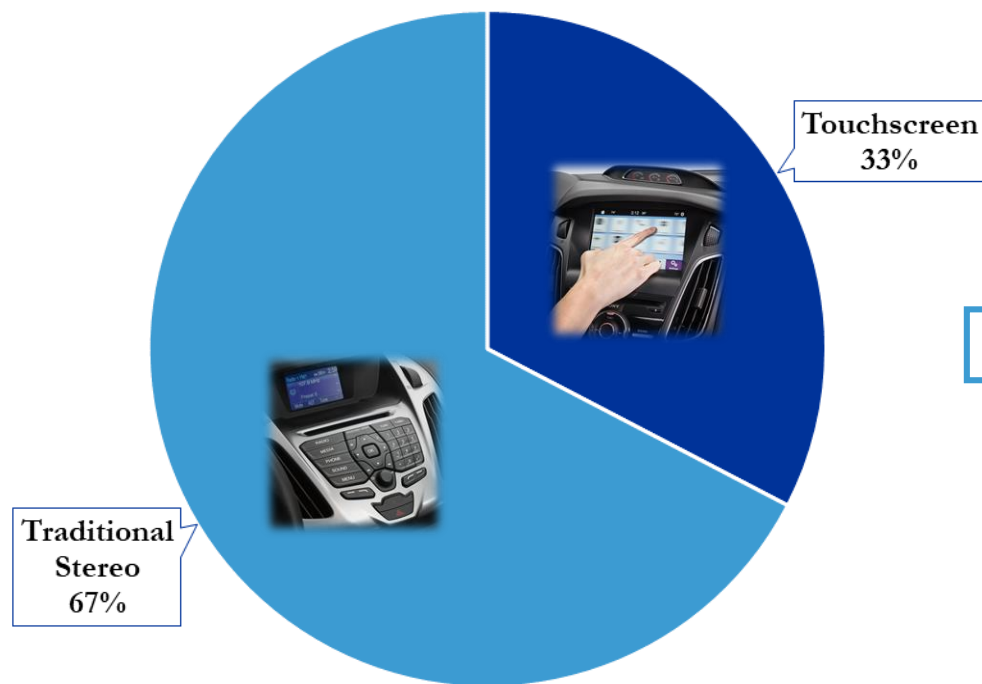
- We asked UK owners of cars less than five years old about user experience
- Feedback on ease of use and capability of current in-car systems is underwhelming
- Over one third of owners said their in-car controls are not easy to use
- Over one third said their car does not have the capabilities they require
- Over one third use other devices (e.g. smartphones) to fill the capability gap
- The thing owners want most is... a more accessible user interface
- Preferred interface design varied considerably -- OEMs pursuing a one size fits all approach might suffer

**This presentation is only a
subset of the research
findings.**

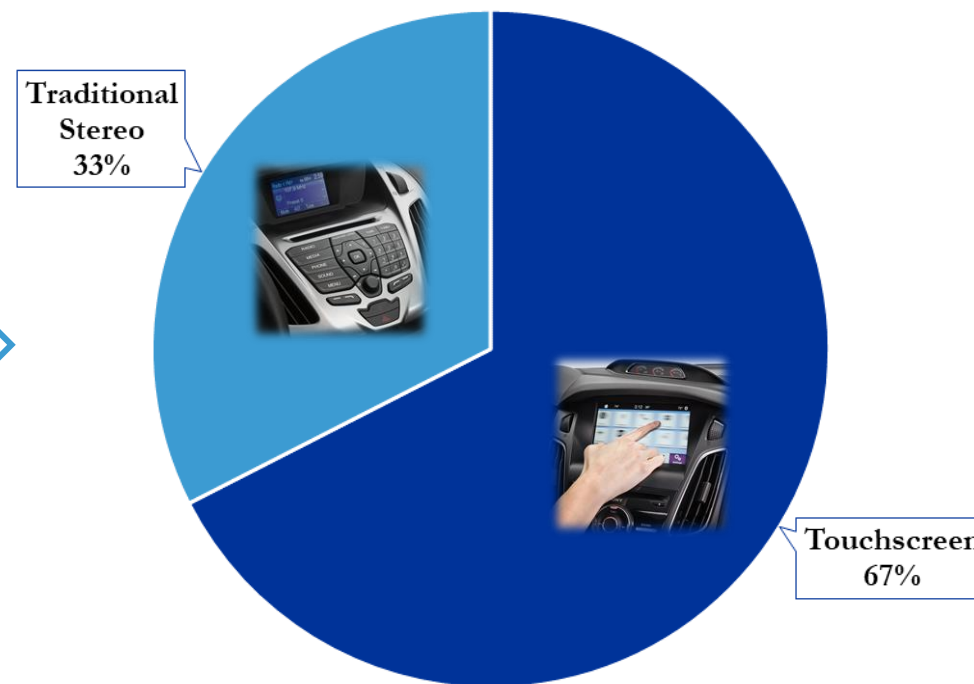
**Get in touch if you want to
know more!**

THE TOUCHSCREENS ARE COMING

Owners of cars three to five years old



Owners of cars under three years old



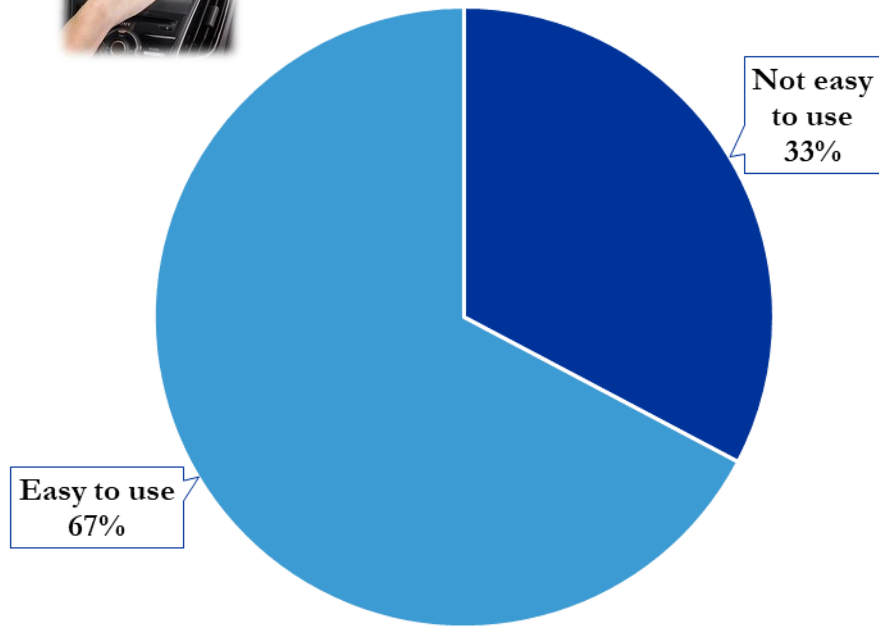
Verbatim question: *What kind of entertainment controls does your car have?*

n = 261

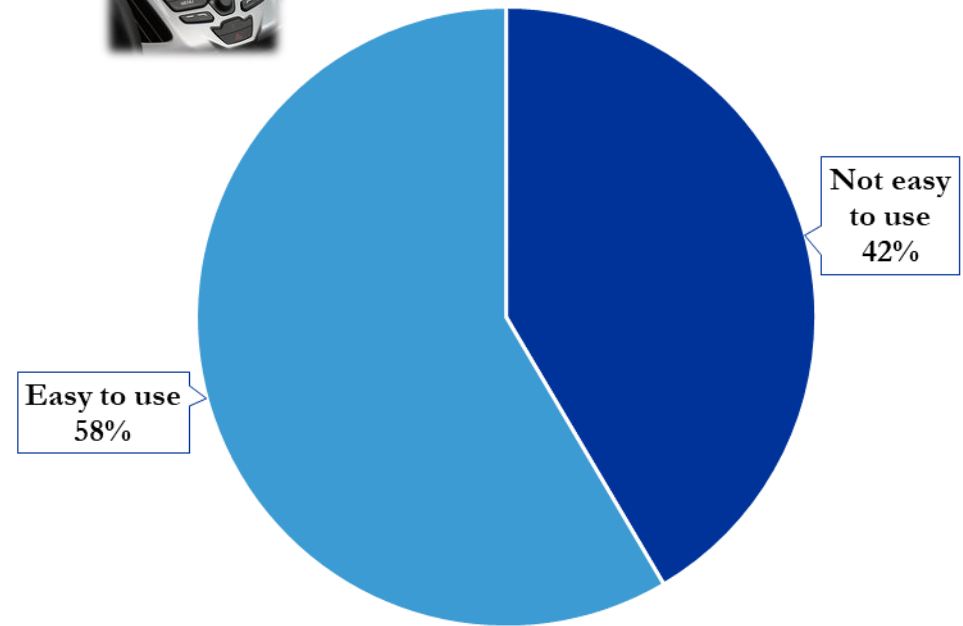
Touchscreens Have Gained Share Rapidly And Are Clearly The Market Favourite; Majority Of Respondents Had Touchscreens.

MANY ARE CONFUSED BY OEM INTERFACES...

Touchscreen users with cars under three years old



Traditional stereo users with cars under three years old



Verbatim question: How easy is your in-car entertainment to use?

Easy to use = Score of 6 or 7 (out of 7)

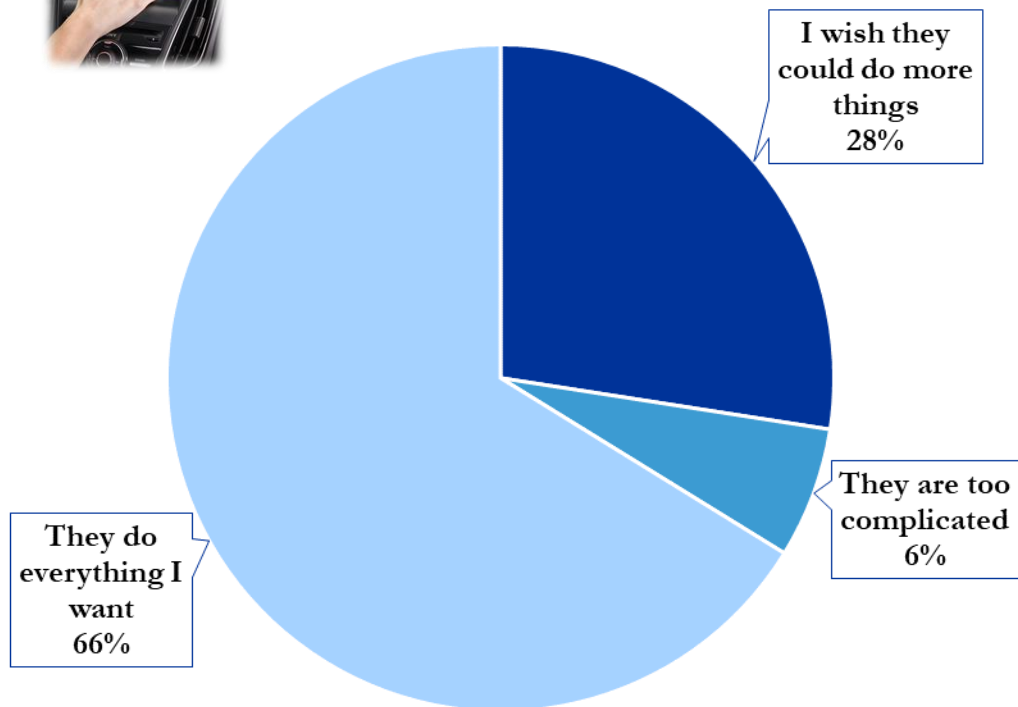
Not easy to use = score of 1-5 (out of 7)

Touchscreens Rated Better, But Is It Acceptable For 33% To Have Difficulty Operating A Key Emotional And Practical Interface With The Car?

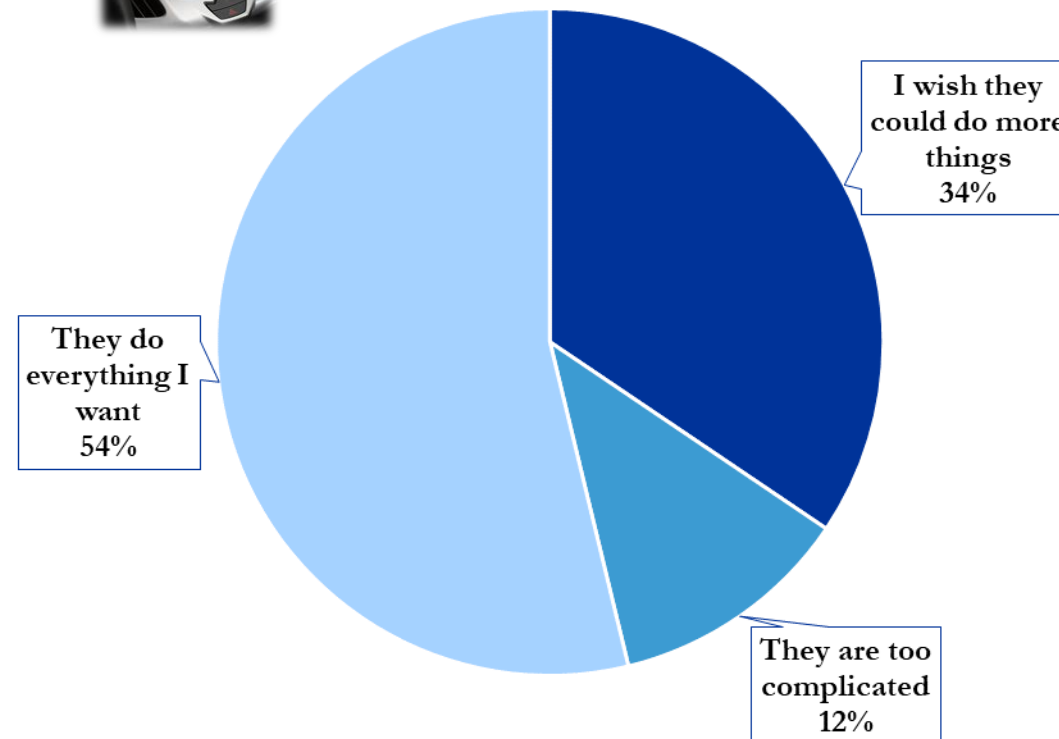
...AND DISSATISFIED WITH CAPABILITY...



Touchscreen users



Traditional stereo users

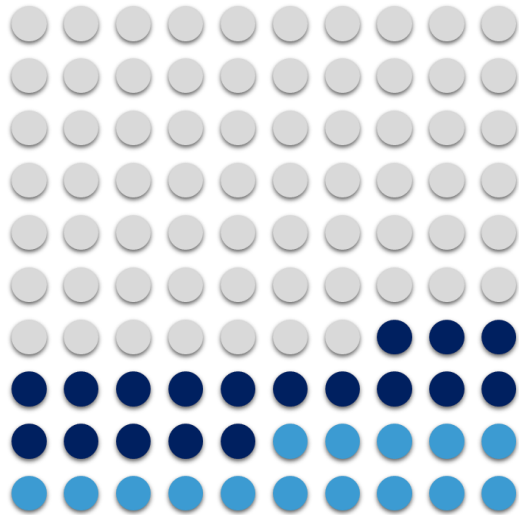


Verbatim question: Which statement about your car's entertainment controls do you agree with the most?

One Third Say Their Car Has The Wrong Balance Of Capabilities.

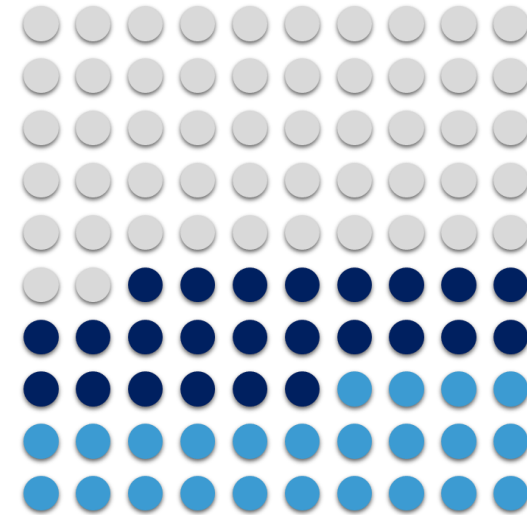
...SO THEY TURN TO OTHER SOLUTIONS

TOUCHSCREEN OWNERS



33% USE OTHER DEVICES
15% OF WHICH IS NAVIGATION

TRADITIONAL STEREO OWNERS



48% USE OTHER DEVICES
24% OF WHICH IS NAVIGATION

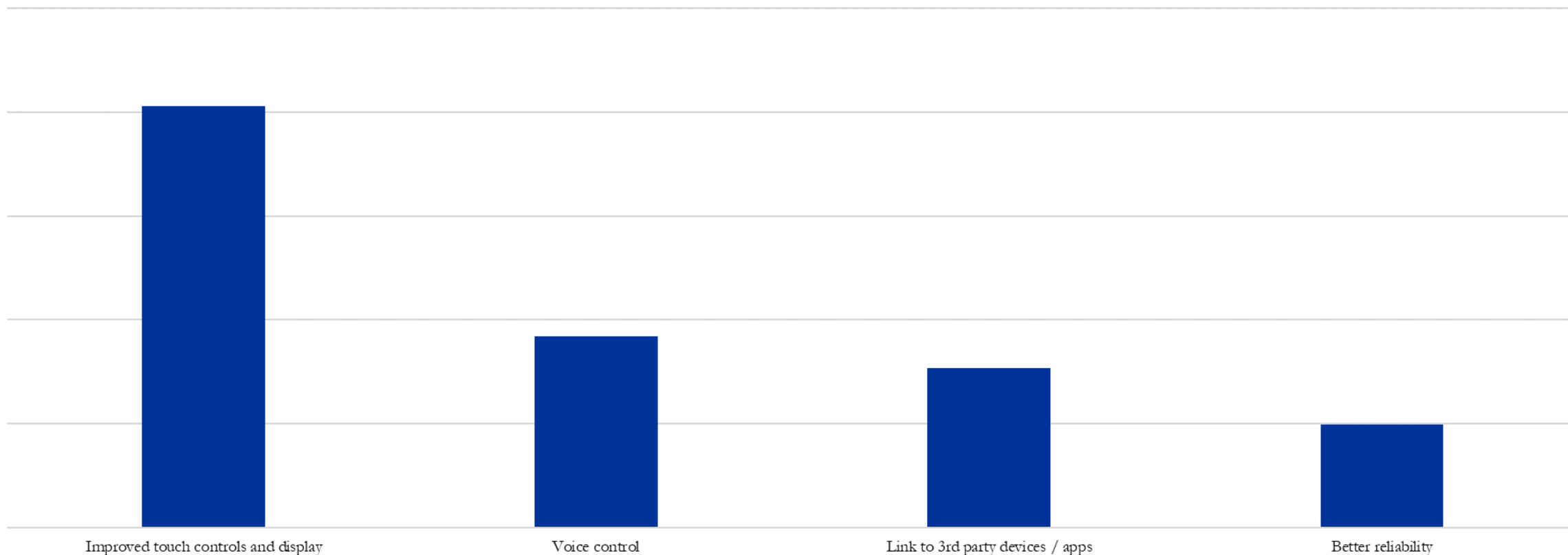
Verbatim question: Do you put any other devices on your car dashboard?

n = 261

One Third Of Touchscreen Owners Use Smartphones And Purpose Built Navigation, Even Though Their Vehicle Has Similar Capabilities.

We asked what owners
think would **improve** their
vehicle's user experience

What Owners Would Like To Add



Verbatim question: *If you could add one thing to your car's entertainment controls, what would it be?*

Although Many Owners Wanted Extra Capabilities, The Most Recurrent Theme Was Frustration With Their Existing System.

KEY STATS: WHAT PEOPLE REALLY WANT

3 : 1

0.67

PEOPLE WHO WANT IN-CAR TEA OR COFFEE



PEOPLE WHO WANT IN-CAR BOILED EGGS



PERCENTAGE OF SECRET AGENTS
IN SURVEY DATA SET

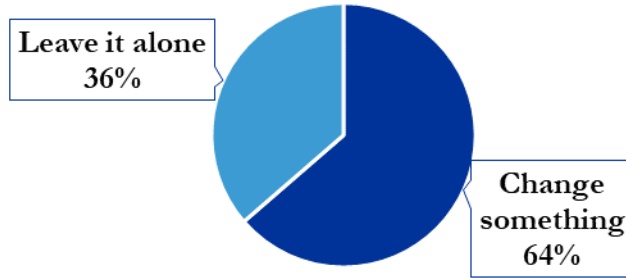
(THEY TOLD US THAT THEY NEED
EJECTOR SEATS IN THEIR NEXT
CAR)

**But having the latest
technology isn't for
everyone...**

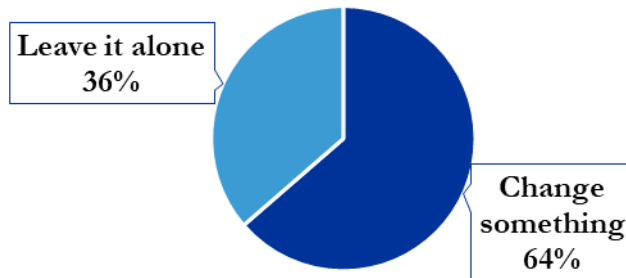
A LARGE BAND OF TRADITIONALISTS REMAINS



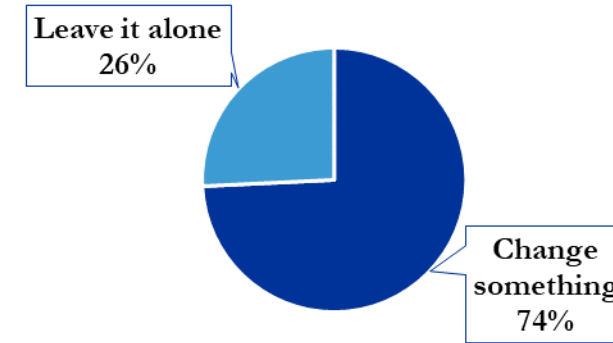
Touchscreen users with cars three to five years old



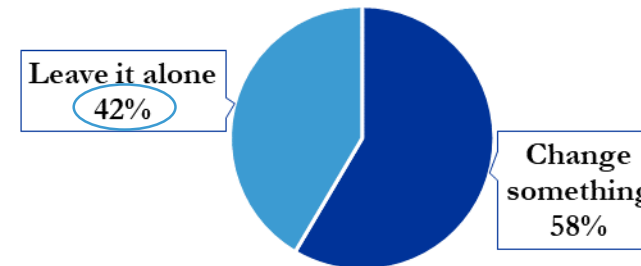
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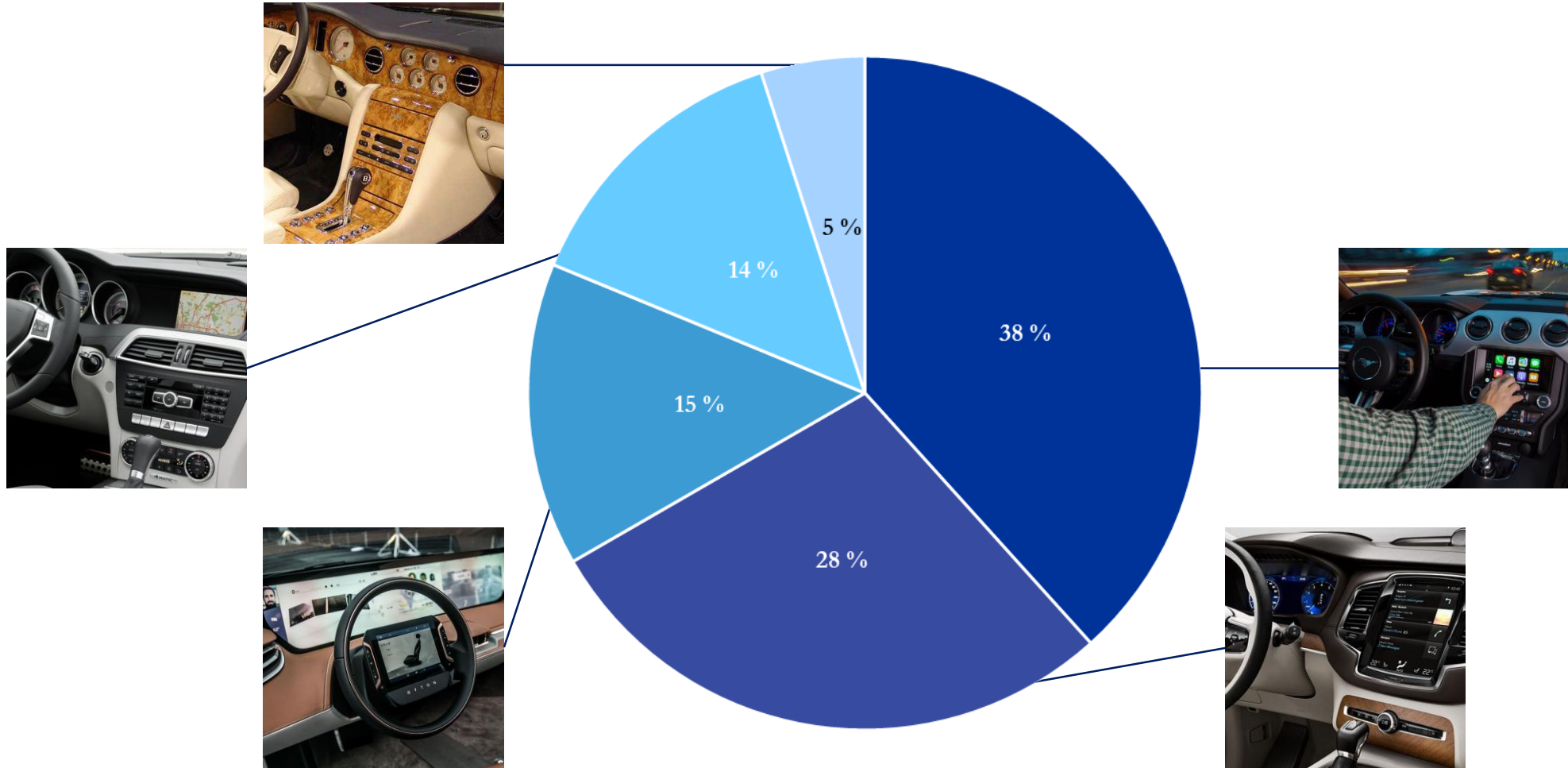
Verbatim question: If you could add one thing to your car's entertainment controls, what would it be? (Change something represents a free-form answer by the respondent other than "Nothing", "n/a" or similar)

n = 261

**Contentment With Traditional Units Is Increasing As Usage Shrinks.
Newer And Older Touchscreens Users Equally Eager For New Features.**

There is no one size fits all solution to a great in-car experience; we found a wide diversity of preference.

NO ONE SIZE FITS ALL SOLUTION



Verbatim question: *What style of controls would you like in your next car?*

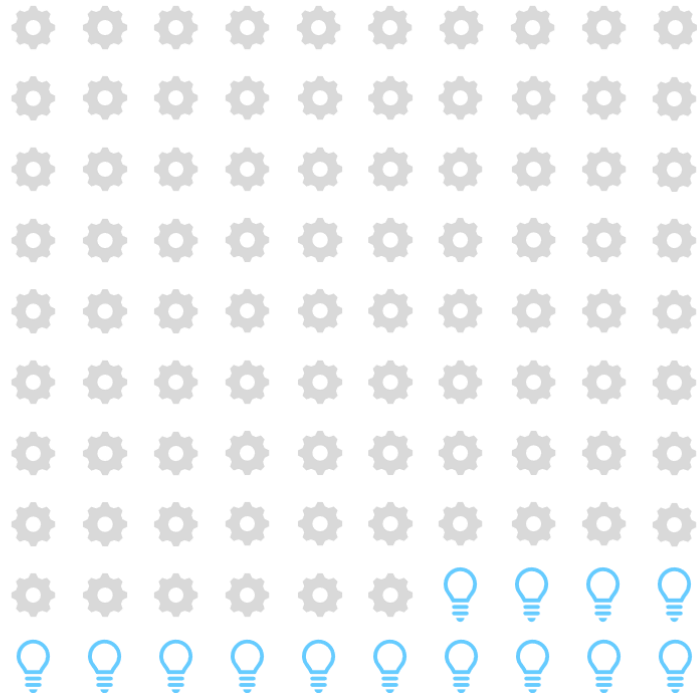
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Opinion On Preferred User Interface Was Divided -- Normal OEM Approach Of Single High End / Single Low End Offering Looks Sub-Optimal.

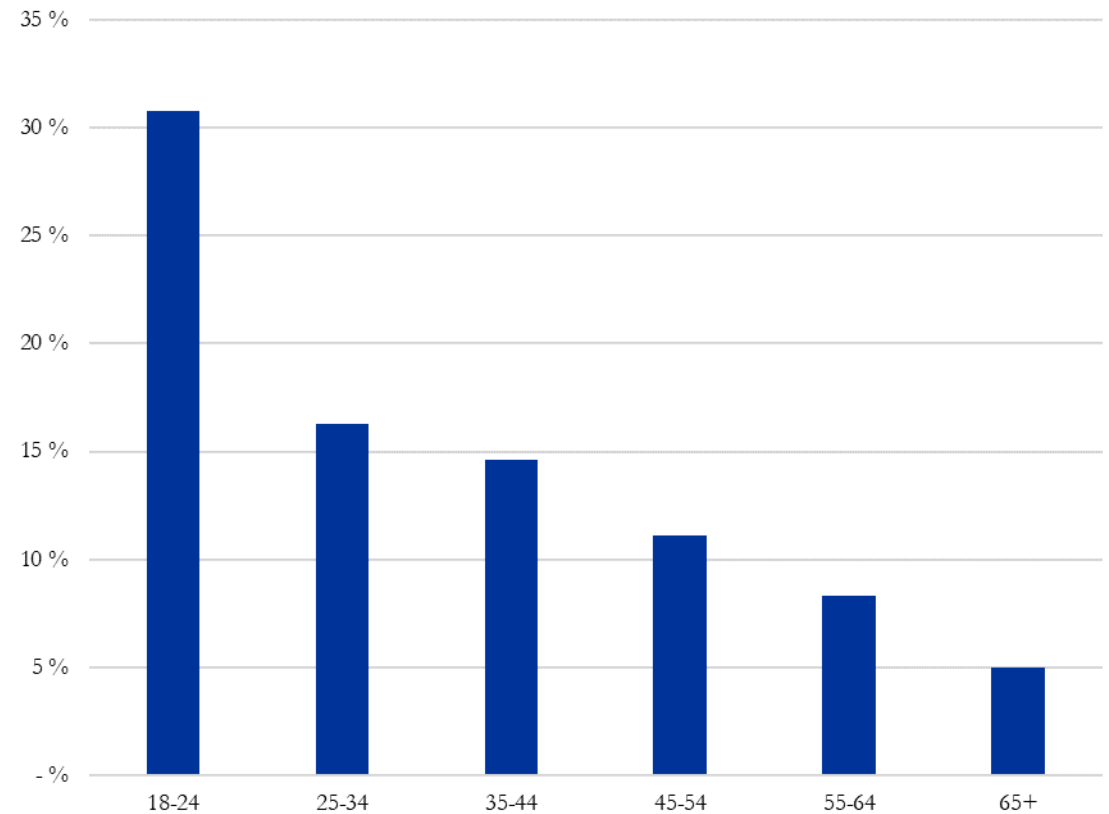
Owners still develop
personal relationships
with their cars...

I'M NO FUN ANYMORE

14% OF OWNERS GIVE THEIR CAR A NICKNAME



% Who have given their car a nickname, by age group



n = 261

Over 30% Of Under 25s Give Their Car A Nickname But Relationship Quickly Becomes Less Personal -- For The Over 65s, It's Only 5%.

...we found a correlation
between relationship and
how much customers
value new services...

But that's for another time

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- **Consultancy and research firm founded by an ex-automotive OEM insider**
- **Operational experience covering manufacturing, R&D, finance, B2B & strategy**
- **Substantial past management responsibilities, with regular C-Suite interaction**
- **Track record of high performance**
- **Expertise in identifying trends, creating scenarios and developing action plans**



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