

In-Vehicle Infotainment in the Covid New Normal: Consumer Survey





Introduction

This report presents the findings of an Online CARAVAN® survey conducted by ENGINE Insights to assess car owner attitudes about in-vehicle infotainment during the COVID ‘new normal’. The report includes insights about the importance of the personal vehicle, radio in the dashboard, content preferences, personalization of in-dash infotainment, safety, and more.

The survey was conducted among a sample of 1,003 adults 18 years of age and older, comprised of 501 men and 502 women. The online omnibus study is conducted three times a week among a demographically representative U.S. sample of 1,000 adults ages 18 and older. The survey was live on January 4-6, 2021. Most questions in the survey were asked among vehicle owners (N=921).

Respondents were members of an online panel and had agreed to participate in online surveys and polls. Completed interviews are weighted by five variables – age, gender, geographic region, race and education – using data from the U.S. Census Bureau to help ensure reliable and accurate representation of the total U.S. population, 18 years of age and older.

Throughout this report, results are analyzed in total as well as by gender, generation, and occasionally children in household where statistically significant differences exist at a 95% confidence level.

Generations are defined as
Gen Z, ages 18-24 (N=126);
Millennials, ages 25-40 (N=331)
Gen X, ages 41-56 (N=255)
Baby Boomers, ages 57-75 (N=276)

Personal Vehicles More Important Than Ever During Pandemic for Nearly Half of Owners



Close to half (47%) of all vehicle owners feel their personal vehicle is more important than ever to them today versus pre-COVID. They are equally likely to cite a discomfort with public transportation or ride-sharing (28%) and a perception of their vehicle as a place of refuge during these challenging times (27%) as reasons.

While the same proportion of vehicle owners (47%) report no change in the importance of their personal vehicle, just 6% say it is less important as they no longer commute to work.

Among generations, the feeling that their personal vehicle is more important than ever is most prevalent among Millennials (61%) and Gen Z (59%) when compared to their older counterparts, particularly Baby Boomers (30%).

Having children in the household enhances vehicle importance - over three in five vehicle owners with children in their household (62%) report their vehicle is more important than ever, versus just 39% of those with no children in the household.

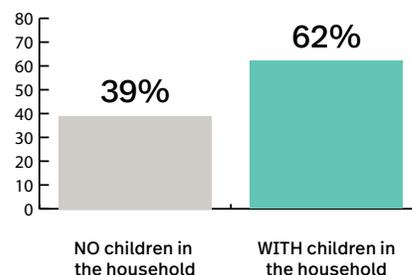
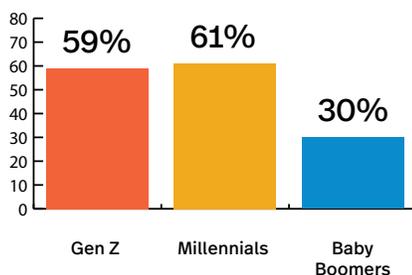
And, over a third feel their vehicle offers a place of refuge during these challenging times, while 38% say they are no longer comfortable with public transportation.

Meanwhile, the majority of Millennials (61%) and Gen Z (59%), who pre-pandemic were trending against vehicle ownership, report the importance of their personal vehicle has grown versus pre-pandemic versus Baby Boomers (30%).

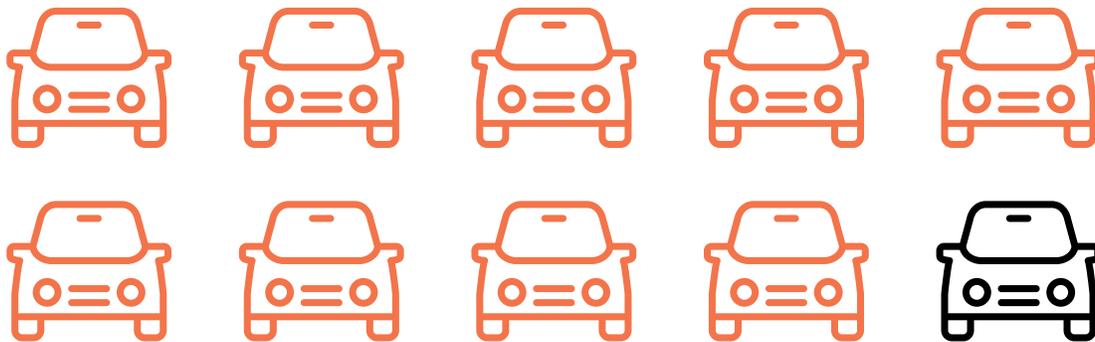
47%

say their vehicle is more important than ever to them today versus pre-COVID

Vehicle Ownership More Important vs Pre-Pandemic

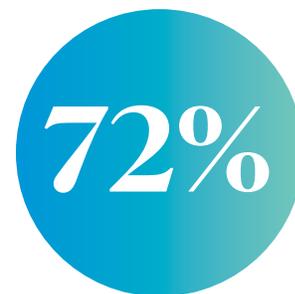


Radio in Dashboard Very Important



9 out of 10 Vehicle Owners say Radio In-dash is Important (91%)

The vast majority of vehicle owners (91%) believe it is important to have radio in their dashboard, with 72% saying it is indispensable or very important. Interestingly, Millennials (78%) value radio in the dashboard more than their generational counterparts.



overall say it is
Indispensable/
Highly important





78% of Millennials Say Radio in the Dashboard is Important

One in four owners (25%) feel radio in their dashboard is indispensable, *especially now (during pandemic) that having access to local news is important*. This sentiment is more common among Millennials (32%) – especially compared to Gen Z (18%) and Baby Boomers (20%).

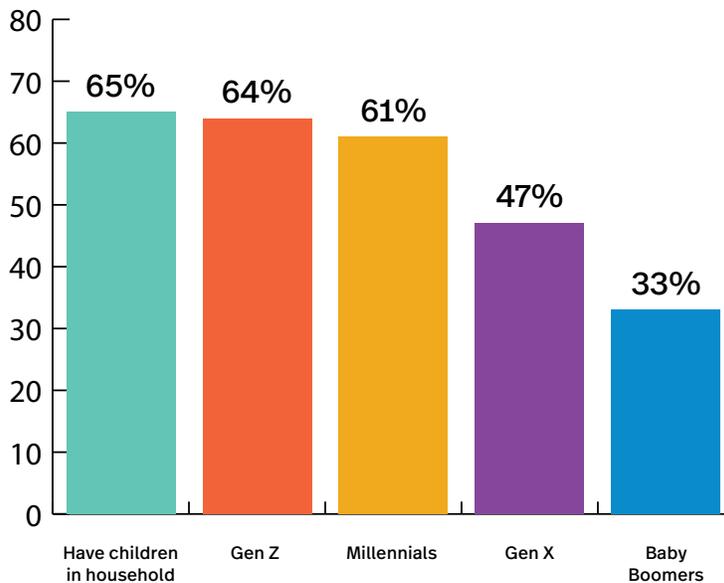
Nearly two in five vehicle owners (38%) say radio in their dashboard is very important while close to one in five (18%) state it is very important but they want it digitally enhanced. The younger the generation, the more inclined owners are to express a desire for digital enhancement, with Gen Z being the most likely (28%) and Baby Boomers the least likely (11%).

Dashboard Entertainment/ Information Importance Has Grown

Covid has made a difference in the importance to vehicle owners of their in-dash entertainment/information: for 47% of vehicle owners, having entertainment/information available in their vehicle's dashboard is more important than ever versus pre-COVID.

Among generations, Gen Z (64%) and Millennials (61%) are far more inclined than Gen X (47%) and Baby Boomers (33%) to view dashboard entertainment/information with greater importance today, versus pre-COVID. These sentiments are shared by vehicle owners who have children in their household, 65% of whom consider their vehicle's dashboard entertainment/information more important than ever versus 38% of those with no children.

47% of vehicle owners say in-dash entertainment is more important versus Pre-COVID



Dashboard entertainment is more important today vs pre-COVID



The top reason attributed to this higher importance of dashboard entertainment/information is the ability to listen to music as an anxiety reliever, given all the bad news and stress in the world (25%). One in five (20%) cite the ability to access local news/pandemic bulletins, while 15% say because their vehicle has become a third place of refuge. Particularly for Gen Z (38%), listening to music in their vehicle serves as an anxiety reliever.



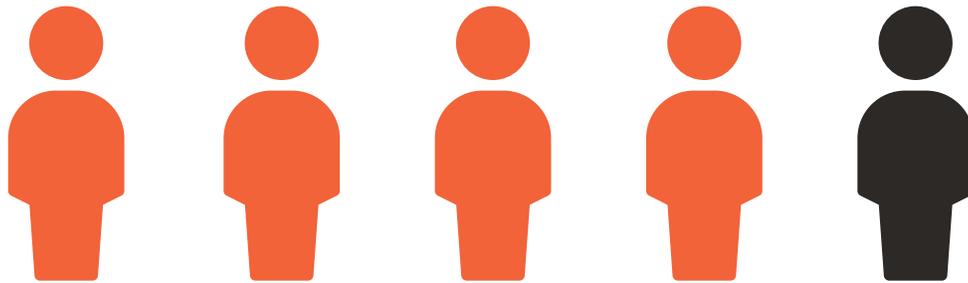
Car owners with children are significantly more likely to cite all reasons for the increased importance, including listening to music as an anxiety reliever (35%), accessing local news/pandemic bulletins (30%), and using their vehicle as a third place of refuge (22%).

Personalization of Dashboard Entertainment Important to 80%

Four in five vehicle owners (80%) say it is important for their in-vehicle dashboard entertainment to be personalized to their particular tastes and interests. Most (58%) consider it very important, while another 23% say it is somewhat important. Just one in five owners (20%) state that personalization of their dashboard entertainment is not important to them.

This personalization of dashboard entertainment is increasingly relevant to young consumers, as a significantly higher proportion of Gen Z (91%) and Millennials (89%) rate it important compared to Gen X (81%) and Baby Boomers (70%).

Among all vehicle owners, the top reason for the very important rating of personalized dashboard entertainment is not having to fiddle with controls while driving (30%). One in five (21%) feel there is so much content clutter, it is hard to find what they like. Nearly as many (17%) claim they are used to having relevant content pushed to them on other digital platforms.



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Free Content and Worry-Free Upgrades Most Important



The functions most important to vehicle owners in their in-vehicle dashboard entertainment experience are free content (30%), not having to worry about upgrades/connection (28%), and being able to continue listening to a radio station digitally when the vehicle has gone out of broadcast range (25%).

Other functions include having relevant content recommended in the dashboard without having to look for it, having rich visual/textual information about the artist and song listened to, and being able to see the song lyrics.

Over four in five vehicle owners (83%) consider one or more of these functions important to their dashboard entertainment experience. This percentage is highest among Gen Z (94%) and Millennials (91%). Compared to their older counterparts, these generational groups place greater importance on having content relevant to what they listen to “discovered” for them, and having rich visual/textual information about the artist and song they are listening to.

Gen Z (94%) and Millennials (91%)

placed greater importance on having content “discovered” for them and having rich visual/textual information about the artist and song they are listening to than Gen X and Baby Boomers

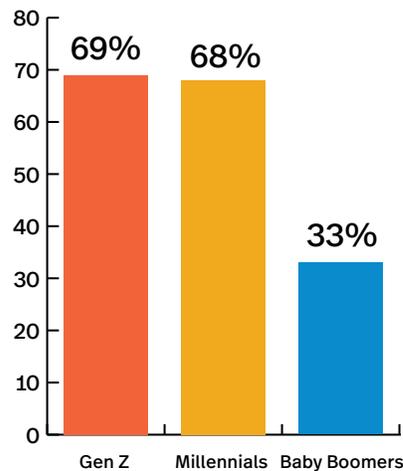


Post-Pandemic Listening Content in Vehicle Has Changed for Over Half

More than half (52%) of vehicle owners say the kind of content they listen to in their vehicle has changed versus pre-pandemic. Respondents are nearly equally likely to say they are now listening to much more news on the radio (16%), to less news and more music stations (15%), or to a greater variety of content than they were before (14%). Fewer state they are listening to more podcast content (7%).

Gen Z (69%) and Millennials (68%) are by far the most likely of all generations to listen to different content in their vehicle post-pandemic, and they are twice as likely as Baby Boomers (33%) to do so. While Millennials (22%) are significantly more inclined than Gen Z (9%) to listen to much more news on the radio, consuming a greater variety of content than before the pandemic is far more common among Gen Z (28%) compared to all other generations [Millennials (18%), Gen X (15%), Baby Boomers (7%)].

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Likelihood of listening to different content

Free Listening Choices are Key to Most Vehicle Owners



Free versus subscription is key: roughly four in five vehicle owners (79%) feel it is very important that listening choices in their vehicle are free (radio/podcasts/etc.) versus subscription based. Owners relate to the sentiment that, with so much great broadcast radio and free, discoverable content available, it makes no sense to pay. This feeling is shared across genders and generations.

Majority of Vehicle Owners Agree to Usefulness of Radio



Three in five vehicle owners (60%) agree that radio is great when they run out of things to listen to in their media library. Nearly as many (58%) find the clutter of content choices too difficult to sift through, so they mainly listen to their pre-programmed radio stations.

Over half of vehicle owners (52%) like having radio as the anchor for their media diet, while 36% say they frequently shift from podcast, to satellite radio to their music library to broadcast radio. Men are significantly more inclined than women to agree with both of these statements.

52%

of vehicle owners like having radio as the anchor for their media diet

Among generations, agreement with each statement is highest among Millennials, particularly radio is great when they run out of things to listen to in their media library (74%). Perhaps not surprisingly, they are three times as likely as Baby Boomers to frequently shift from podcast, to satellite radio to their music library to broadcast radio (57% vs. 19%, respectively).





THANK YOU