



Dashboard Dialogue

Edison Research for WorldDAB, June 2023

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Methodology

[Edison Research](#) conducted interviews with radio listeners who purchased a vehicle within the past three years in France, Germany and the United Kingdom. The research was completed in May 2023.

To explore the dashboard user experience, people were split into two cohorts – half of the participants were interviewed in their own vehicle, and half were interviewed a newer rental vehicle. Owners of all types of vehicles were included, from budget to luxury.

Edison Research also conducted around 800 survey interviews in each country with adults who own or lease a newer vehicle or plan to within the next year.

Megan Lazovick, Vice President, Edison Research, presented the findings at WorldDAB Automotive 2023. [Watch the presentation](#)

Key findings

- **Radio is the most listened to audio platform in the car – with all the new technologies on the dashboard, radio is number one in the car**
- **The audio experience is a key part of personal satisfaction with their car – and more importantly, removing friction in the in-car audio experience increases a person’s satisfaction with a vehicle**
- **Radio is an essential part of the in-car experience. The drivers spoken to cannot disconnect radio from the car experience. The two are linked in the minds of the consumer in every market studied.**

Dashboard user experience

Edison Research asked all participants – whether they were in a familiar or unfamiliar vehicle - what they liked about the dashboard.

[CLICK FOR VIDEO: Likes of dashboard](#)

We hear comments such as:

- *"Well I find that using the radio has the simplicity that I have, like, two clicks to do - in fact I turn, click on radio, then I click on my radio and that's it I'm done."*
- *"Modern, uh it's quite slick."*
- *"I think the presentation looks appealing. The controls are the same here, I can turn something on and I can adjust the volume."*
- *"The DJ and the type of music it is which is nice to have that I think."*
- *"I got used to the radio very very quickly, it's very intuitive, and I didn't need to think."*
- *"The highlight is the presentation, that you have a nice big image for the station here and that it has a nice presentation."*
- *"I think that's a major feature to have a radio, you expect that in a car."*

There were a lot of positive comments in relation to ease and use and the design aesthetic. It's good to hear vehicle owners show off their favourite features in a car or see someone's reaction to a new feature. But what about their frustrations with the dashboard experience?

[CLICK FOR VIDEO: Dislikes of dashboard](#)

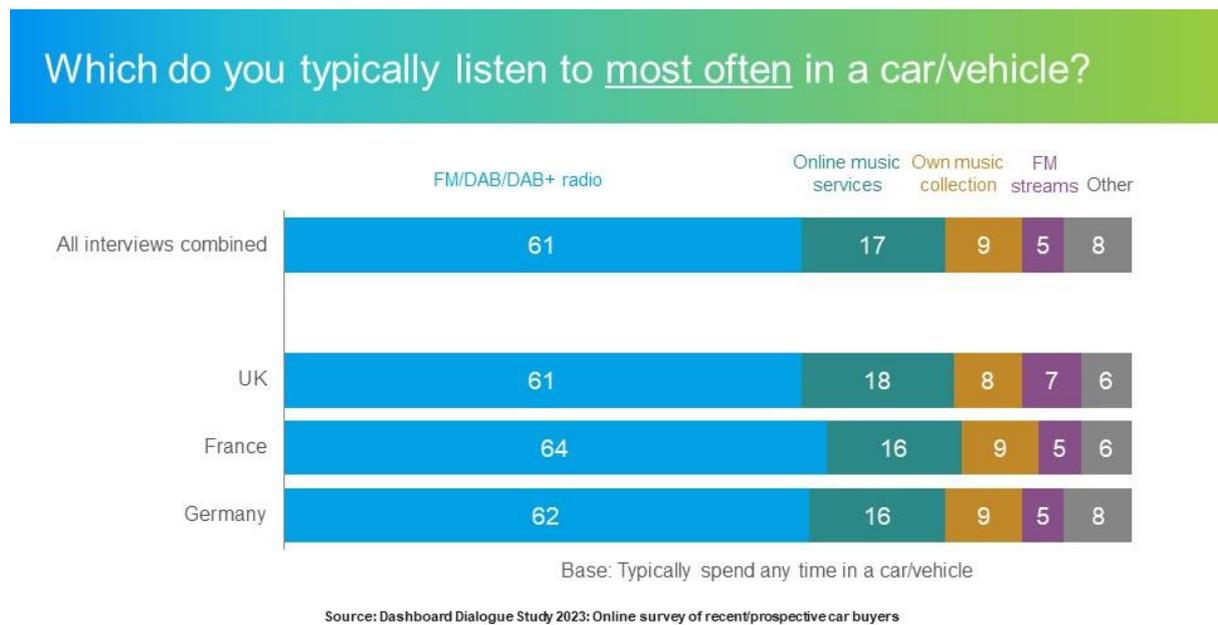
- *"When I was like scrolling up and down it doesn't always register that and I have to do that a couple of times before I can actually find the station I want to and yeah I don't know I just find the screen too small."*
- *"When you listen to the radio for example this is pretty interesting in this mode - hold on, I'll do it really quick so you can see then you can see - what? You can also see the lyrics, but now I don't know."*
- *"At any rate that sometimes - yeah it's very sensitive if I tap around too much."*
- *"Yeah I think it just has to be quick and easy to do."*
- *"I don't see the whole thing here so, I'd like to maybe there's a lot of space here, obviously it's quite a large text basically there's a lot of space here, but even things like maybe like little images of someone like the the stations or for example I'm quite familiar with that - so that that might help you put quite a few on on that screen."*
- *"I can go into my library, here. and I've got some playlists. It's a little bit weird doing it like this, it's a bit awkward doing it this way, and that's it."*
- *"Me I find this quite complicated, I don't like looking at screens whilst I'm driving, I like to be able to just concentrate on the roads - you know press a button and it's there. If I'm flicking through for something like that that would be driving me absolutely mad."*

There were some complaints, and many of those were in relation to difficulty accessing their favourite audio content or having access to information about that content.

Key finding #1: Radio's reach

Radio is the most listened to audio platform in the car – it's important to understand how the average consumer moves throughout their day. And when it's in the car, for most people, it's with the radio.

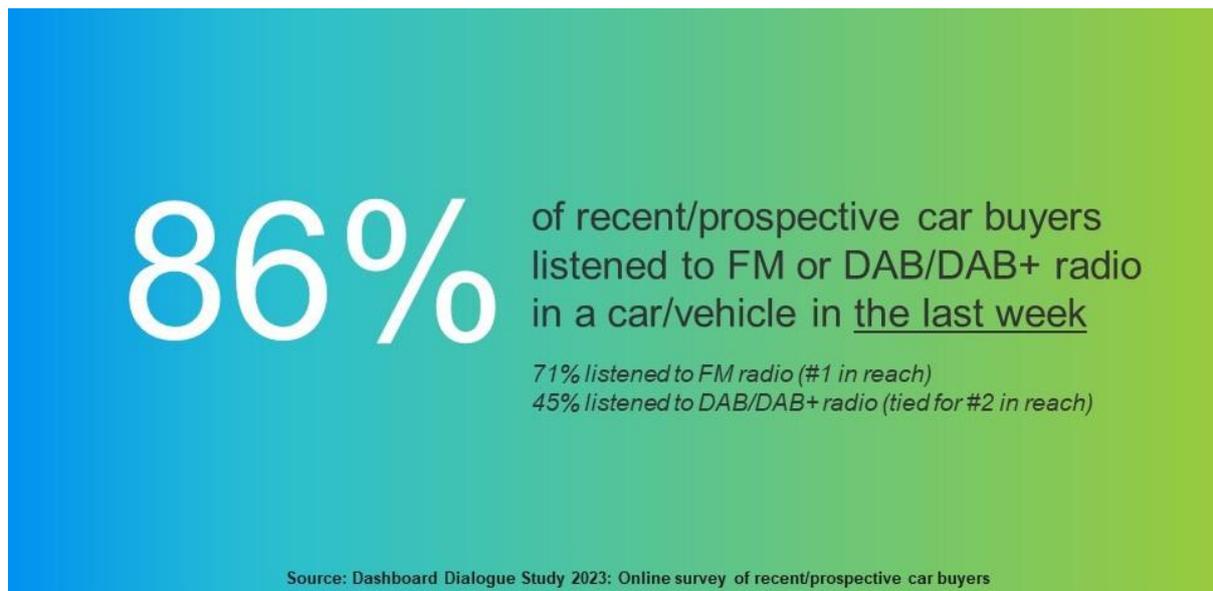
Which do you typically listen to most often in a car/vehicle?



61% of all interviews said they listen to radio in the car most often. That's more than online music services, their owned music collection and others combined.

That's true across all markets studied. Radio is the most used service in the car in the UK, France and Germany.

Weekly radio in-car listening



86% of car buyers listened to FM or DAB/DAB+ radio in a vehicle in the last week. So radio listening is a solid habit among car buyers - let's find out why they choose listen to radio in the car.

CLICK FOR VIDEO: What do you like about radio?

- ***"Radio? We all want to listen to the radio..."***
- ***"I like the fact that it's got so many different things going on in it. I like the fact that you've got the breakfast show in the morning which is sort of a bit more - it's very chatty, they get people on it etc. And then it changes to a bit more music, and they've got a competition that they run at mid-morning. And then I like the Jeremy Vine show because it's very much about current affairs, and then it starts changing again in the afternoon back more to music, and there's always something different on."***
- ***"Yeah because you just have to listen to the radio station - they're not just weird oldies, they're sometimes just outright good songs. So it's a good radio station also because they bring news and stuff."***
- ***"And particularly I know that there is some news which is very important for me. For me, driving the car is also a source of information."***
- ***"If I'm driving while there's a football match on, that I want to listen to the results for, that I'll use it for."***
- ***"I can't look at my phone while I'm driving to read the news, I rely on the car to find out about traffic flows and stuff like that in my local area."***

What do you like about radio?

Participants shared that they enjoyed radio for its music discovery and news and information. We heard about the ability for radio to surprise, and much more other great feedback. This is a beloved medium, especially in the car.



Top reasons for radio

And the survey data supports that as well. Edison asked what the top reasons are to listen to radio in a vehicle. The top items are: To get news and information, to get weather or traffic reports, and to hear your favorite songs.

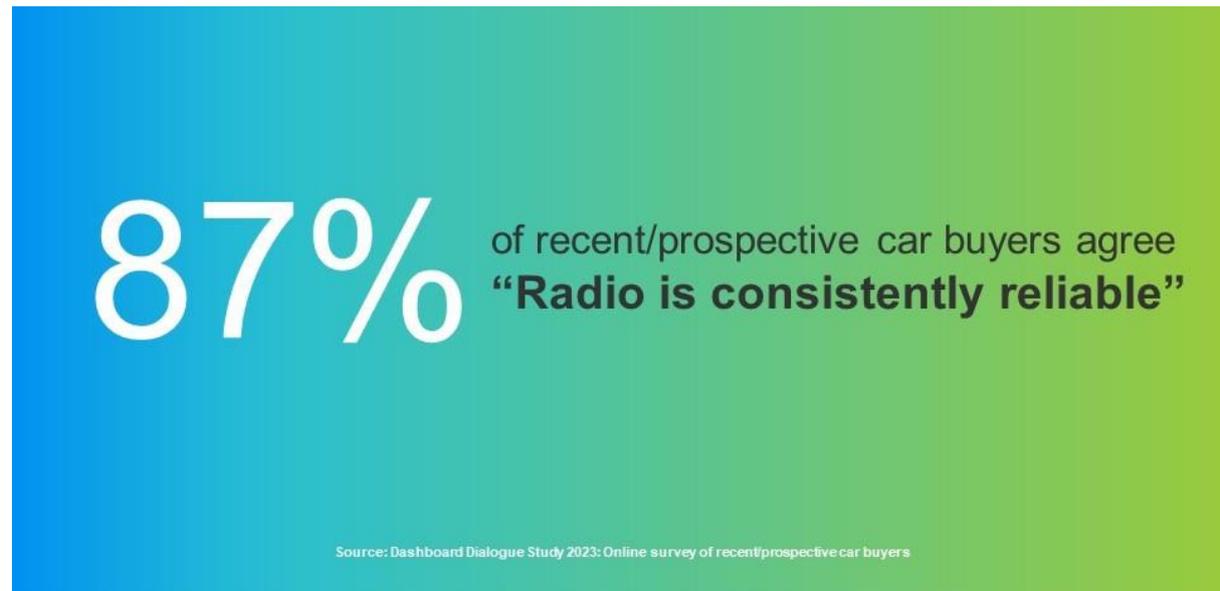
Top reasons for listening to FM or DAB/DAB+ radio in a car/vehicle:



Source: Dashboard Dialogue Study 2023: Online survey of recent/prospective car buyers

Radio is how people stay connected to the world and their local communities – especially when their eyes are on the road.

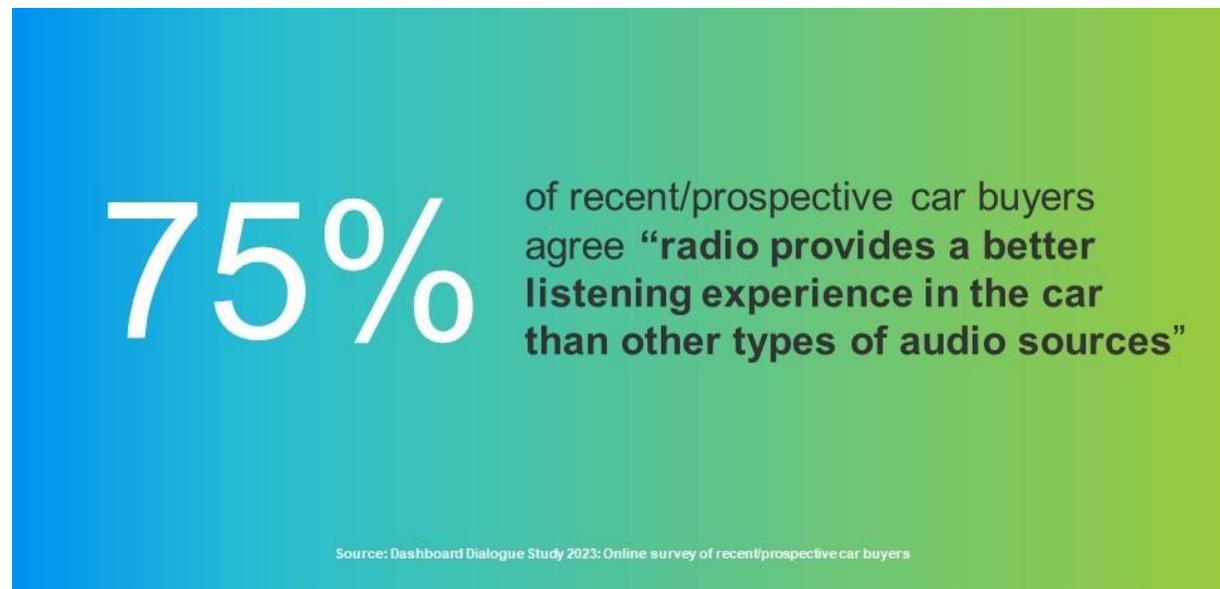
“Radio is consistently reliable”



87% of recent/prospective car buyers agree “Radio is consistently reliable” – so not only is it liked, but also people can count on it to be there – and they know what to expect when they turn it on.

Better listening experience

75% of recent/prospective car buyers agree “radio provides a better listening experience in the car than other types of audio sources”



Those reasons to listen to radio in earlier videos contribute to the attitude measured here. It's impressive that three-quarters of car buyers think radio is the best option in the car.

Now – radio itself is evolving. DAB+ radio was also a topic we discussed during in-car interviews. Here’s what participants had to say about DAB:

CLICK FOR VIDEO: About DAB

- *"Well DAB, it's specific, it's something specific - news and those kind of things."*
- *"I prefer DAB - but it doesn't actually matter as long as it's good music, I'm flexible."*
- *"Oh yeah it's brilliant I think it's it makes me want to listen to the radio more often because it actually sounds much better it doesn't actually sound like the radio it does sound very similar to when I'm playing music from my phone."*
- *"But with DAB you can get all kinds of radio things, it's really crazy."*
- *"It sounds a bit smoother on DAB, doesn't sound as sharp."*
- *"Because there's little hissing, there are great stations I couldn't get with the other radio. And I discovered some new stations, I now have this great display. I saved them and I can choose which one I want."*

DAB/DAB+ radio awareness

75% of those in our survey were aware of DAB or DAB+ radio.

DAB/DAB+ Radio Awareness:

75% of recent/prospective car buyers are aware of DAB/DAB+ radio

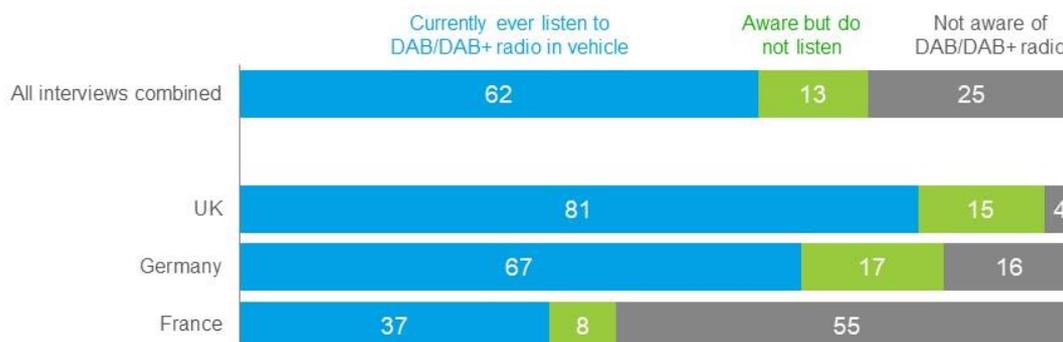
<u>U.K.</u>	<u>Germany</u>	<u>France</u>
96%	84%	45%

Awareness was the highest in the UK – where 96% of car buyers knew about DAB. Most German car buyers are familiar with DAB – at 84%, but awareness has room for growth in France, where 45% of the car buyer population is familiar with the term.

DAB/DAB+ radio listening summary

However, most of those who are aware of DAB, do use it. The blue on the left side of the graph represents the percentage of those who have used DAB in their vehicle. The much smaller green slice represents those who are aware, but do not listen, and the grey represents those who do not know about DAB.

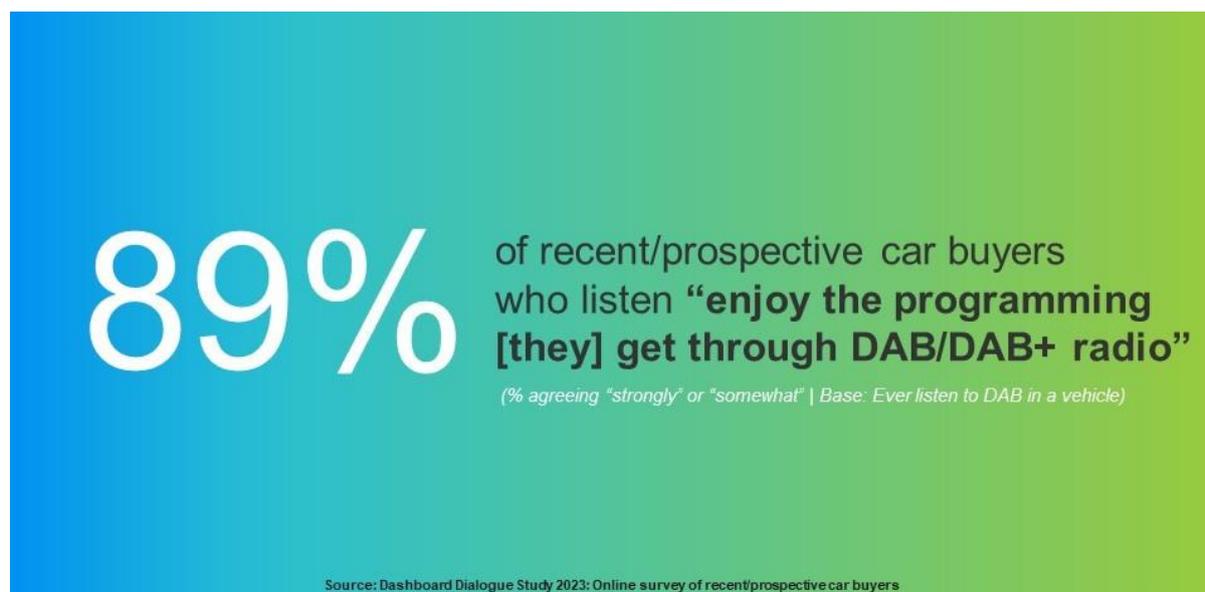
DAB/DAB+ Radio Listening Summary:



Source: Dashboard Dialogue Study 2023: Online survey of recent/prospective car buyers

These findings show the adoption of DAB is just one more example of how well radio does to serve listeners in the car. Once they know about it, they tend to use it.

DAB programming

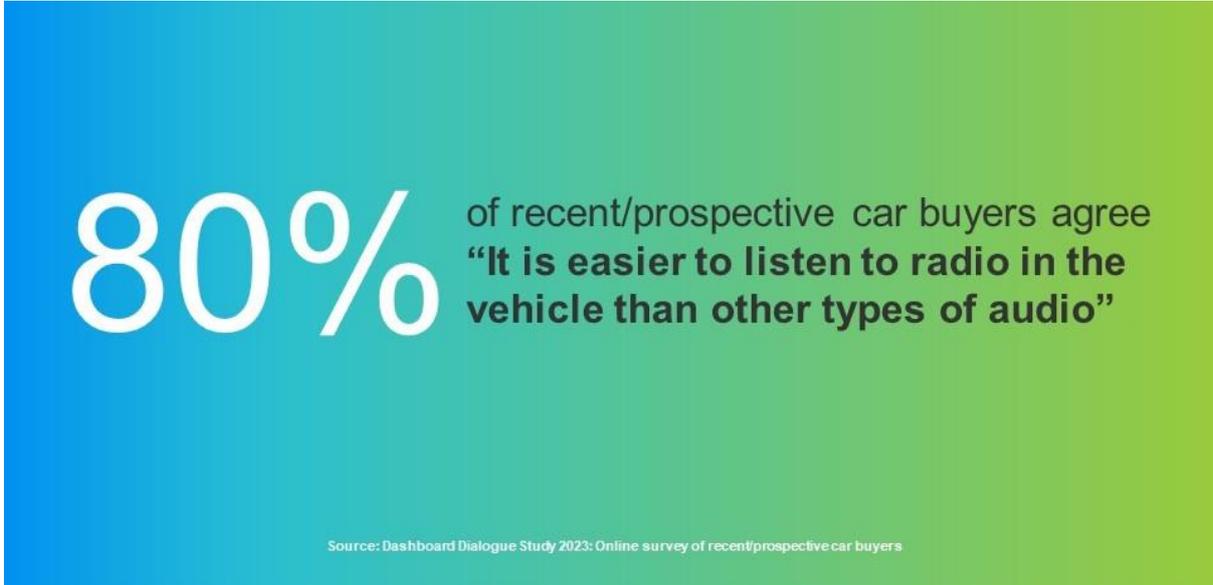


And 89% of recent/prospective car buyers who listen said they “enjoy the programming [they] get through DAB/DAB+ radio.” Again, it’s bringing something consumers already want – radio – and providing them with even more content to enjoy.

Key finding #2: Removing friction

But what happens when there are obstacles between the user and their audio content? Interview responses showed what people dislike about the dashboard – and a lot of that related to the process of accessing audio. This leads to the second key finding: Removing friction in the in-car audio experience increases car satisfaction.

Easier to listen to radio

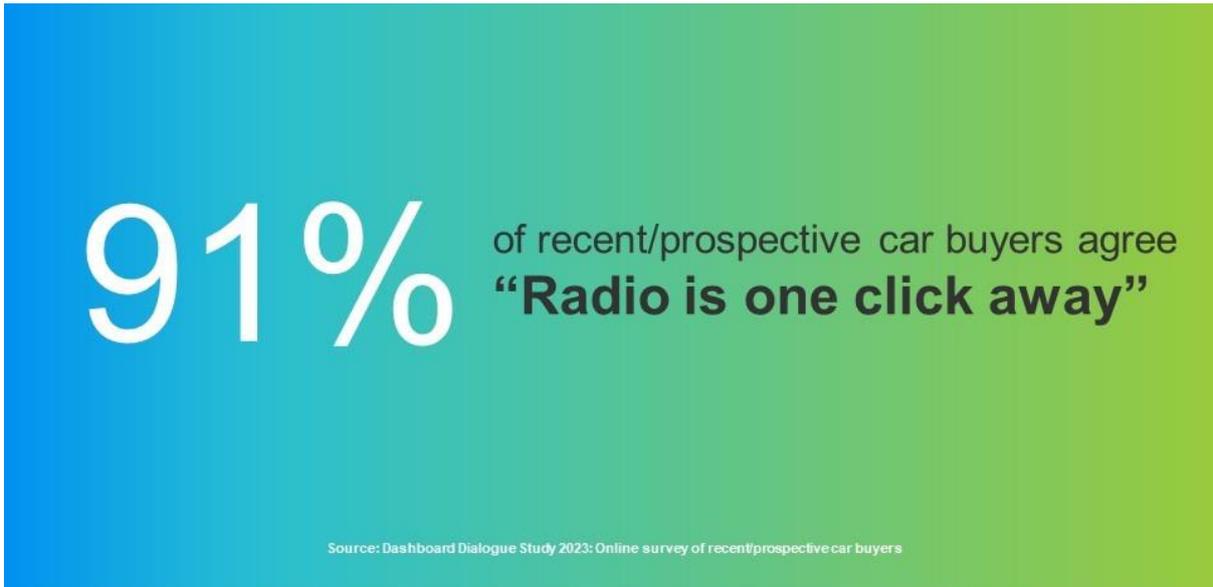


80% of recent/prospective car buyers agree
“It is easier to listen to radio in the vehicle than other types of audio”

Source: Dashboard Dialogue Study 2023: Online survey of recent/prospective car buyers

Part of radio’s success in the car is this: 80% of recent and prospective car buyers agree “It is easier to listen to radio in the vehicle than other types of audio.” There isn’t much friction in the user experience when it comes to accessing the radio. And where there is less friction, there is more use and a more enjoyable experience.

“Radio is one click away”



91% of recent/prospective car buyers agree
“Radio is one click away”

Source: Dashboard Dialogue Study 2023: Online survey of recent/prospective car buyers

And why is radio easier in the car? In many cases, there are few to no actions needed to access it. Our survey indicates that 91% of recent or prospective car buyers agree that radio is one click away. People want simplicity and radio is simple.

In the in-car interviews, those who were in their own vehicle had no trouble accessing their favourite stations or stations they were prompted to find. And those who were in unfamiliar vehicles, in most cases could find the radio easily.

Key finding #3: In-car essential

The final key finding is that radio is an essential part of the in-car experience.

This is not just because it's been highlighted that the majority of car buyers use it in the car, or because it provides an easy, frictionless user experience. It's because people simply associate the car and radio together. The idea of driving in a car is tied to the idea of listening to the radio in the consumer's mind.

It's so tied, in fact, that it is an important part of their consideration when buying a car.

Important that next vehicle has radio

Importance of FM or DAB/DAB+ radio in car/vehicle:

91%

of recent and prospective car buyers said it was important that their recent/next vehicle has FM or DAB/DAB+ radio

80%

of recent and prospective car buyers would be "much less" or "somewhat less" likely to purchase their next vehicle if it did not have a radio

42% saying "much less likely"

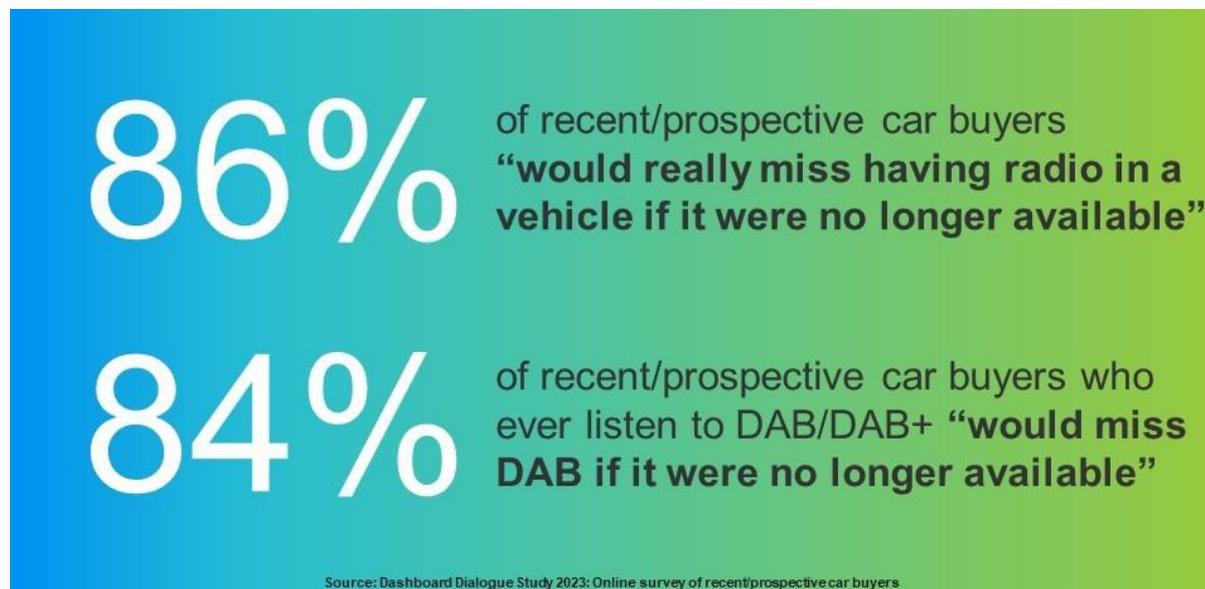
Source: Dashboard Dialogue Study 2023: Online survey of recent/prospective car buyers

91% of recent and prospective car buyers said it was important that their recent/next vehicle has FM or DAB/DAB+ radio

Also, the study found that among recent and prospective car buyers, 80% would have been "much less" or "somewhat less" likely to purchase their current or next vehicle if it did not have a radio.

Miss radio

Survey respondents were asked to imagine a car without a radio. 86% of recent/prospective car buyers said they “would really miss having radio in a vehicle if it were no longer available”.



Then asked specifically about DAB radio, 84% of car buyers who ever listen to DAB radio said they “would miss DAB if it were no longer available”

This is a topic that came up in the in-car conversations as well.

[CLICK FOR VIDEO: How would you feel about a car without radio?](#)

- *"That would be dreadful! I need the radio. Why would it not be available?!"*
- *"Yes, the idea of... I never really thought about it because as a kid I always had the radio. For me having the radio is like having a trolley in the supermarket. Yes, for me it's an essential thing to have."*
- *"If there was no radio that would be awful. I'd prefer to go without air conditioning."*
- *"I can't imagine it. I learned to drive with the radio, even though the choice was limited. Radio is basic equipment for a car. If someone tells me there's no radio in the car I'm going to be like, what?!"*
- *"Yes, it would be a shame. A shame, OK. Yes, because there's important information, emergency services and all that. So when you're on a long journey, you break down and you see the emergency services are here however many miles away. This information can be useful, it's important."*
- *"I think that's the deal breaker, yeah I probably wouldn't I wouldn't buy it. I would not buy the car if it wasn't available."*
- *"I wouldn't have a car which didn't have a radio."*
- *"If the car did not have a radio, I would not buy the car."*

Key findings

Key Findings

Radio is the most listened to audio platform in the car

Removing friction in the in-car audio experience increases car satisfaction

Radio is an essential part of the in-car experience

- **Radio is the most listened to audio platform in the car - And it doesn't just win by a small margin - it by far has the most reach in the car.**
- **Removing friction in the in-car audio experience increases car satisfaction - People love their cars for a lot of reasons - but the audio experience plays a huge part in satisfaction. That's part of the reason why people use radio in the cars - no friction.**
- **And finally, radio is an essential part of the in-car experience. Radio in the minds of the consumer is fundamentally, consciously and unconsciously tied to the car.**

“Broadcasters should feel proud of the service and entertainment they provide to the car buyer.

Those who design or think about the design of a dashboard should feel good about how much influence they have over the satisfaction of the car buyer.

And as technology continues to evolve, each should work together to keep the consumer at the centre of design.”

[Megan Lazovick, Vice President, Edison Research](#)