



# 2010 Ward's Auto Interiors Conference

May 19, 2010

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## Giving the consumer what they want and need

- How do we determine what it is that the consumer wants in and from their vehicle?
- How can we make the consumer experience better?

Before we can solve the consumer's problems or increase their satisfaction...

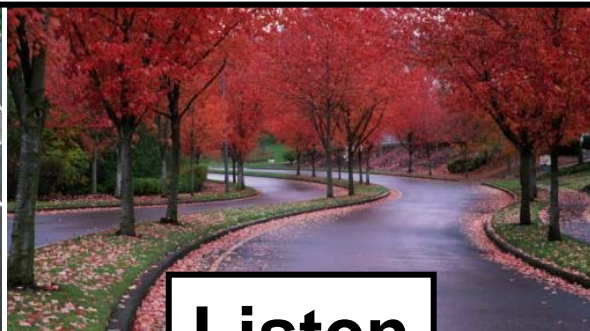
Before we start to design and develop new features and functions...

Before we put pencil to paper...

**We must do 3 simple things**



**Look**



**Listen**



**Learn**

# What do we use our vehicles for?

- Commute to and from work
- Running errands, getting groceries
- Transporting kids to school, activities
- Vacations
- Moving bulk items
- Entertainment, night out
- Support our activities, hobbies
- Relaxation



# We use our vehicles all week long

## Average Daily Time In Vehicle

Weekday



2 hours 52 minutes\*

Weekend



2 hours 7 minutes\*



- Expanding needs
  - Increased flexibility
  - Increased functionality

# Body styles support flexibility

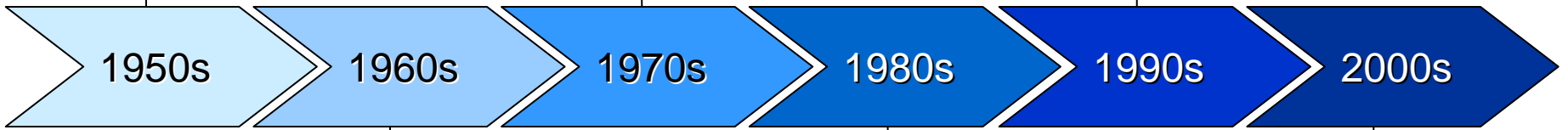
Station Wagon



Hatchback



SUV



Full-size Van



Minivan



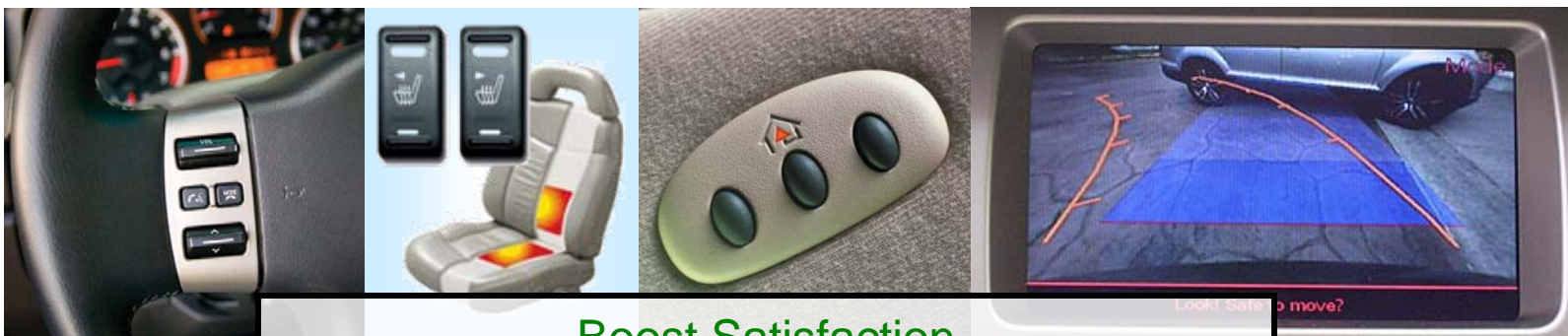
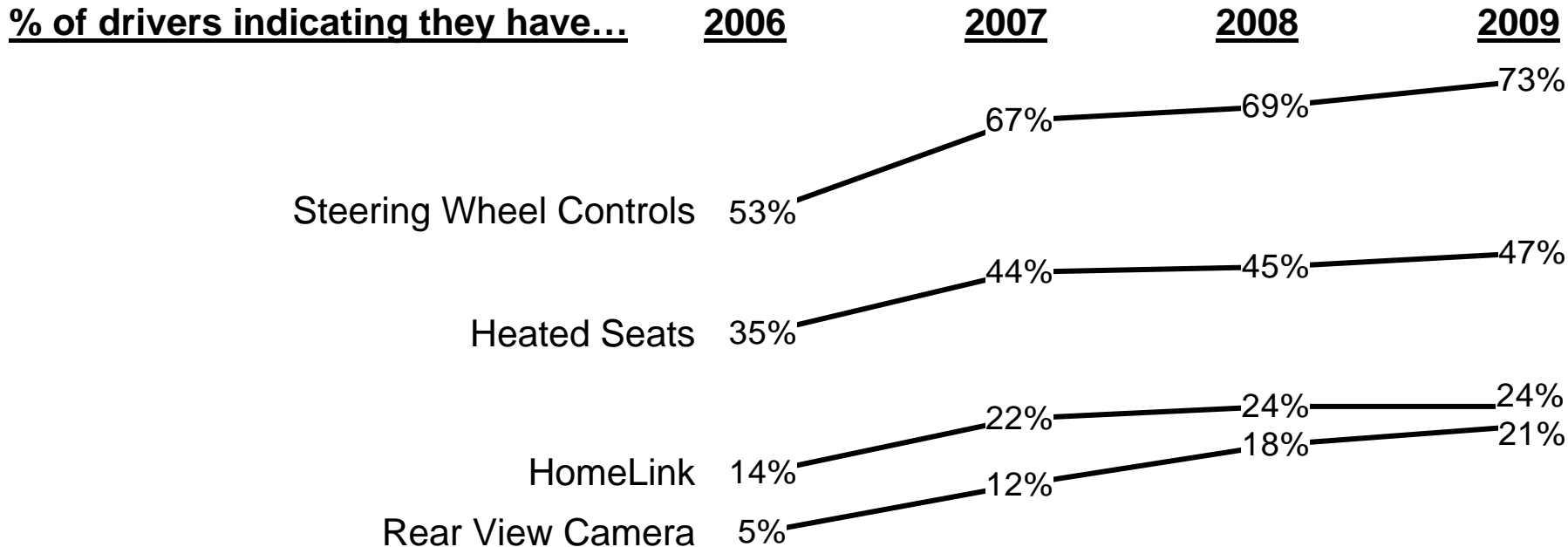
Crossover

Along with flexibility,  
we need to focus on functionality



- Ability to contain, access and operate what I need, when I need it...

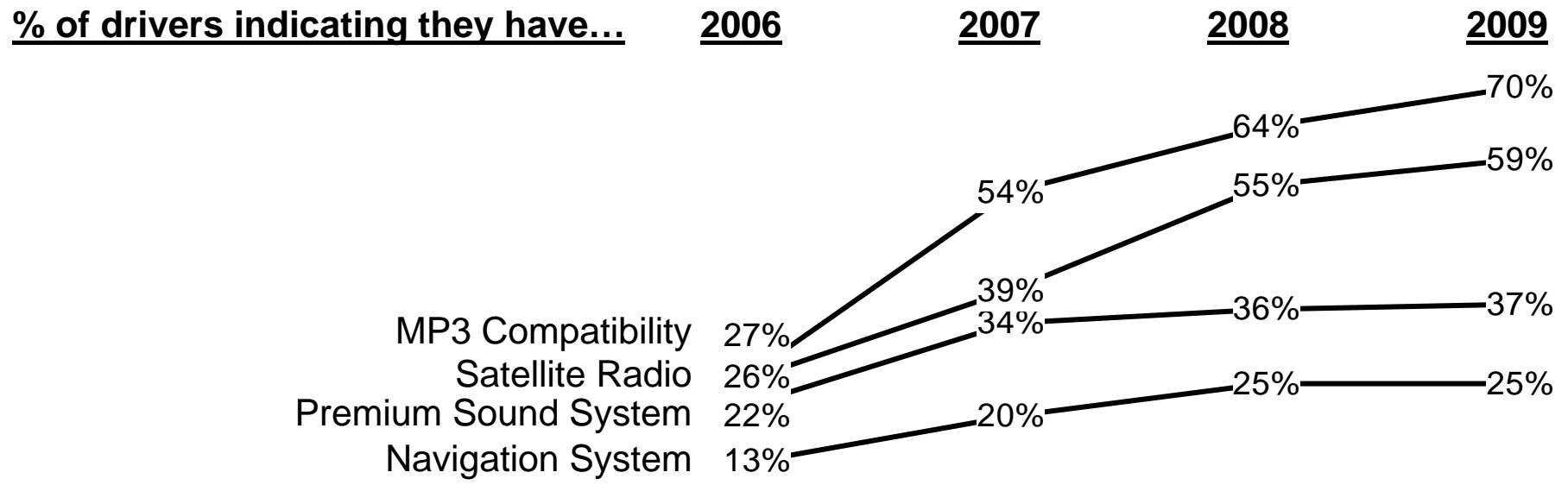
# We expect more of (and in) our vehicles... ...Comfort and Convenience features



**Boost Satisfaction**

Source: J.D. Power and Associates  
2006-2009 Vehicle Quality Study (VQS)<sup>SM</sup>

# ...Entertainment and Navigation features



**Boost Satisfaction**

Source: J.D. Power and Associates  
2006-2009 Vehicle Quality Study (VQS)<sup>SM</sup>

# Not all of the consumer's needs are complex

Items In The Vehicle	Top 10
Mobile Phone	1
Pens/Pencils	2
Sunglasses	3
Wallet	4
Napkins/Tissues	5
Change	6
CDs/DVDs	7
Garage Door Opener	8
Emergency Kit	9
Umbrella	10

- The top 8 items are all typically stored in close proximity to the driver to allow for regular usage
  - Predominately in the center console
- The emergency kit and umbrella have less need for accessibility as they are kept in the vehicle “just in case”
  - However, umbrella storage must be in the cabin and reachable when needed



# Center Console Demand

Items regularly (among top 2 locations) stowed in the center console



32%



52%



23%



30%



34%



51%



47%



Satisfaction Snapshot...  
Effectiveness of Center Console Storage  
 ⊕ **Lowest satisfaction rating** among 38 interior attributes  
 Source: 2009 J.D. Power and Associates Interior Quality and Satisfaction Report



% Stowed In Console

# Everyday Items in the Vehicle

Items In The Vehicle	Top 10
Mobile Phone	1
Pens/Pencils	2
Sunglasses	3
Wallet	4
Napkins/Tissues	5
Change	6
CDs/DVDs	7
Garage Door Opener	8
Emergency Kit	9
Umbrella	10

Items In The Vehicle	Among Women
Mobile Phone	1
Purse	2
Pens/Pencils	3
Sunglasses	4
Wallet	5
Napkins/Tissues	6
CDs/DVDs	7
Change	8
Emergency Kit	9
Umbrella	10

Items In The Vehicle	Cold States
Mobile Phone	1
Pens/Pencils	2
Sunglasses	3
Wallet	4
Napkins/Tissues	5
Change	6
CDs/DVDs	7
Ice Scraper	8
Garage Door Opener	9
Emergency Kit	10



Virtually everyone regularly brings a mobile phone into the vehicle

Among women, a purse is the 2<sup>nd</sup> most common item brought into the vehicle



Need for ice scraper storage is among top 10 in cold weather states



## So consumers need... everything they want

- Vehicles are an extension of our lives... We spend 2-3 hours a day in our vehicles
- The industry has done well to offer flexible interiors
- Flexible does not mean functional
- There is great interest in new features that offer functional solutions and these features will enhance satisfaction
- Not all customer needs are complex... some basic needs are still going unaddressed
- The center console is prime interior storage real estate but having available space is not enough... there needs to be a strategy for this area
- Understanding who your customer is can lead to very specific opportunities to meet the their needs...

**LOOK, LISTEN, LEARN**



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