

### Enhancement of Smartphone Connections, Audio and Video Functions Are Key to Increasing Customer Satisfaction, J.D. Power Finds

#### Alpine Ranks Highest among In-Dash Aftermarket Navigation Systems

**TOKYO: 26 Oct. 2018** — Understanding customers' needs and developing products that meet their high expectations are crucial, according to the J.D. Power 2018 Japan Navigation Systems Customer Satisfaction Index Study<sup>SM</sup>—Aftermarket, released today.

Now in its 11th year, the study measures customer satisfaction with aftermarket in-dash vehicle navigation systems. The redesigned study adds two new factors relating to design elements and connectivity functions, bringing the number of examined factors to six (listed in order of importance): navigation function (27%); audio and video function (19%); display screen (19%); design and texture (17%); ease of use (14%); and other functions, apps and services (5%). Satisfaction is calculated on a 1,000-point scale.

"Customers who purchase aftermarket navigation systems tend to have stronger interest in navigation system and higher expectations than those who use factory- and dealer-installed navigation systems," said **Yuji Sasaki, Director of the Automotive Division at J.D. Power**. "It is crucial to accurately understand a customer's needs and to offer products with functions and performance that meet their desires. Manufacturers of aftermarket navigation systems should further improve and enhance not only the basic navigation function, but also the smartphone connections and audio and video functions."

Following are some of the key findings of the study:

- **Customer expectations of aftermarket navigation system are higher than factory- and dealer -installed navigations:** The study also examines purchasing behavior and future intentions and finds 56% of aftermarket navigation system customers place importance on navigation function, while the percentage drops to 39% of OEM navigation system users. The percentages of customers who place importance on audio and video function are 41% of aftermarket navigation system customers and 22% of dealer-installed navigation system users.
- **Aftermarket navigation system customers more frequently use smartphone connections than factory- and dealer -installed navigation customers:** More than half (56%) of aftermarket navigation system customers use smartphone connections, compared with 52% of OEM navigation system users. Additionally, the study finds that aftermarket navigation system customers more frequently transfer search data for destinations from their smartphones to their navigation systems or use audio- or video-related applications on their navigation systems than OEM navigation system users.

\* The data above is calculated based on respondents who purchased aftermarket or OEM navigation systems in the year.

## Study Rankings

**Alpine** ranks highest, with a score of 666. Alpine performs above the industry average in all six factors and particularly well in display screen and design and texture. Alpine is followed by **Pioneer** (611) and **Panasonic** (603).

The 2018 Japan Navigation Systems Customer Satisfaction Index Study—Aftermarket is based on responses from 2,105 vehicle owners who purchased an aftermarket navigation system from April 2016 through March 2018. The survey was conducted via internet and was fielded in July 2018.

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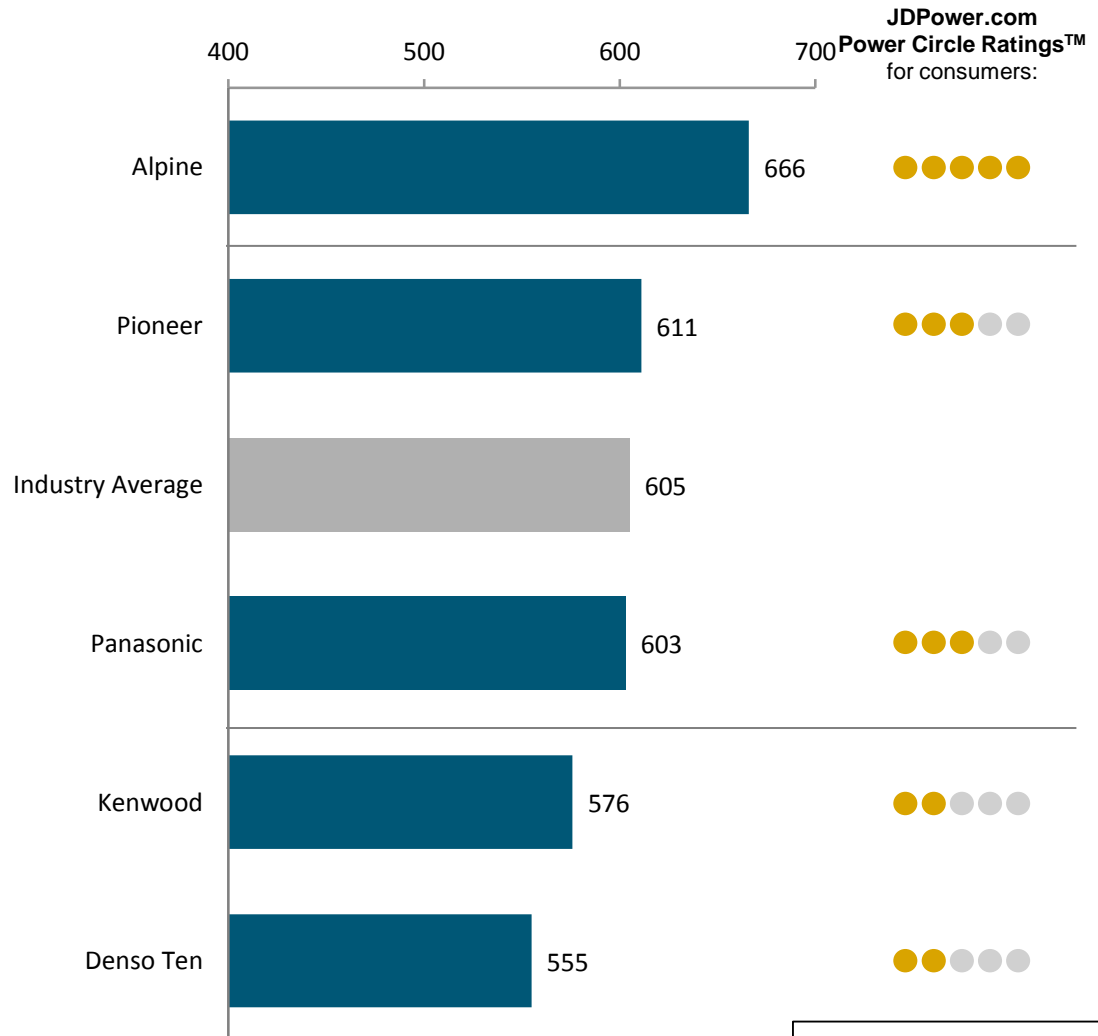
NOTE: Two charts follow.

# J.D. Power

## 2018 Japan Navigation Systems Customer Satisfaction Index Study<sup>SM</sup> - Aftermarket -

### Customer Satisfaction Index Ranking

(Based on a 1,000-point scale)



*Note: Included in the study but not ranked due to insufficient sample size are Clarion and Mitsubishi Electric.*

*Source: J.D. Power 2018 Japan Navigation Systems Customer Satisfaction Index Study<sup>SM</sup>*

**Power Circle Ratings Legend**

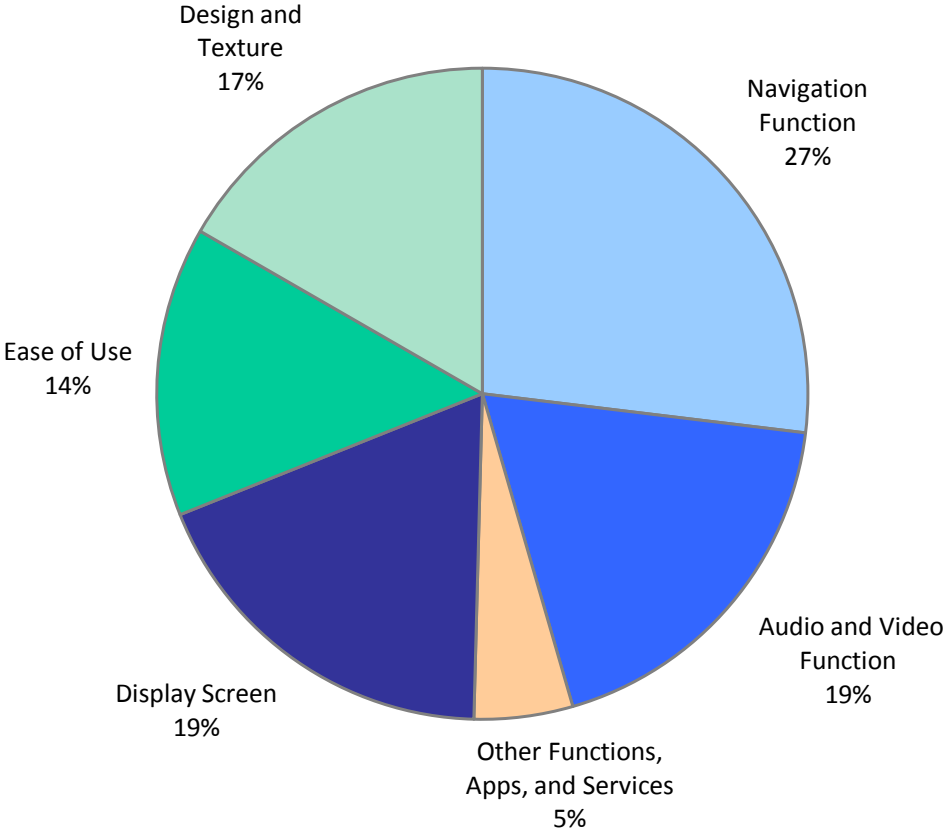
- Among the best
- Better than most
- About average
- The rest

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**2018 Japan Navigation Systems Customer Satisfaction Index Study<sup>SM</sup>**  
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**Factors Contributing to Overall Satisfaction**



*Note: Percentages may not total 100 due to rounding.*

*Source: J.D. Power 2018 Japan Navigation Systems Customer Satisfaction Index Study<sup>SM</sup>*

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