

In-Car Screens: The Next Major Digital Platforms?

FRANCE, UK, GERMANY

Dataxis Survey – 3,000 respondents
In-Car Infotainment preferences in Western Europe
Responses collected in February 2026

Dataxis

Introduction

The rapid integration of screens, applications and connectivity into vehicles is on its way to reshape the car into a fully digital environment. What was once a single interface centered on the driver is evolving into a **multi-screen cabin, spanning the driver, front passenger and rear seats, and opening up an entirely new surface for content, services and monetisation.** For automotive players and digital service providers, this transformation creates the conditions to engage users in new ways, through curated app ecosystems and increasingly sophisticated in-car experiences.

Yet this potential remains only partially realized. **Despite the visible acceleration in equipment and innovation, penetration is still uneven and usage far from universal, leaving large segments of drivers effectively out of reach.** The promise of the connected car is therefore not just a question of technology deployment, but of actual adoption and perceived value.

This raises a set of critical questions for the industry. **To what extent have these new services truly penetrated key European markets such as France, the United Kingdom and Germany?** As OEMs multiply integrations and partnerships, is user demand keeping pace with supply? And beyond interest, are drivers willing to assign tangible value, and ultimately pay, for these services?

This report draws on a **2026 survey conducted by Dataxis to provide a detailed snapshot of the current state of in-car infotainment.** It explores levels of equipment and usage, user perceptions of existing offers, and appetite for emerging services. It also highlights the structural differences shaping demand, from vehicle characteristics to user profiles, with particularly strong contrasts between premium and mass-market segments. In doing so, it sheds light on where value is already established, where it is still emerging, and where the next opportunities are likely to materialize.

Table of Contents

1. **Screens penetration within cars** 4
   The In-Car Screen: A Necessary Yet Not Sufficient Gateway To Digital Services

2. **Apps usage** 6
   App Ecosystems: Growing Access, But Fragmented Usage

3. **Most important car App categories** 7
   App Preferences: Audio Dominates, Video And Gaming Remain Peripheral

4. **Video Apps usage** 8
   Video Adoption: Latent Demand Driven By Exposure And Premium Positioning

5. **Voice Assistant** 9
   Voice Assistants: High Satisfaction, but Limited Penetration

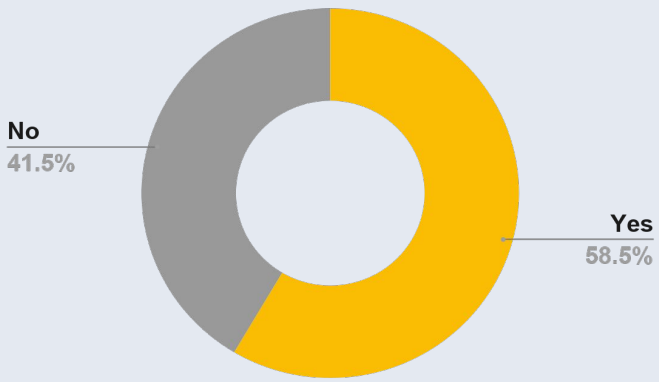
6. **Interest in additional services** 10
   Monetization And Advanced Services: Strong Potential, Uncertain Demand

1. The In-Car Screen: A Necessary Yet Not Sufficient Gateway To Digital Services

Embedded screens have become the primary layer for delivering digital services inside vehicles. Over recent years, their adoption has been increasing, now reaching a majority of drivers across France, the United Kingdom, and Germany as the survey shows. Yet, despite this momentum, **full penetration of built-in screens across the installed car base remains incomplete.**

BUILT IN SCREEN PENETRATION

Is there a screen built into your car's dashboard?



Base: 2,367 adults living in the UK, France and Germany interviewed in February 2026 - Dataxis ©

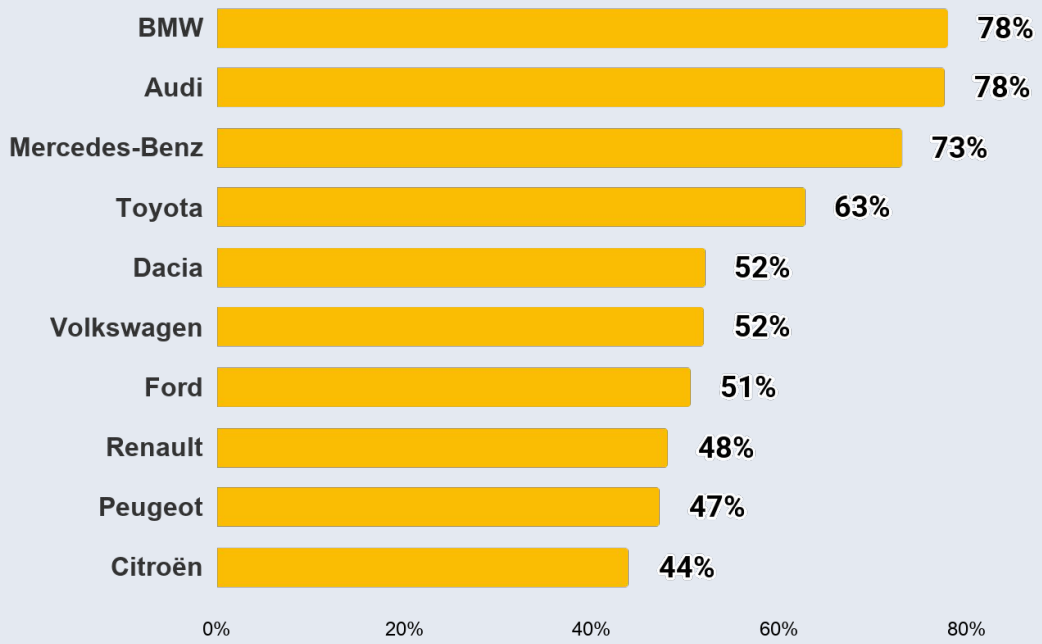
In fact, the survey results highlight important disparities. **Overall, 59% of car users report having a built-in dashboard screen, a figure that rises to 85% among vehicles aged 1–3 years.** This underlines the direct impact of fleet renewal.

Brand positioning is equally significant. Premium manufacturers lead the adoption, with **BMW ranking first, followed by Audi and Volkswagen**. This reinforces a broader pattern: screen-equipped vehicles are disproportionately recent and premium.

This constrains the immediate scalability of in-car digital services and creates a dual reality: **limited mass reach in the short term, but the existence of highly valuable, well-equipped audience segments that can already be addressed today**. Over time, the pace of car park renewal will play a growing role in expanding this addressable base and accelerating overall penetration.

BUILT IN SCREEN PENETRATION BY BRAND

Is there a screen built into your car's dashboard?



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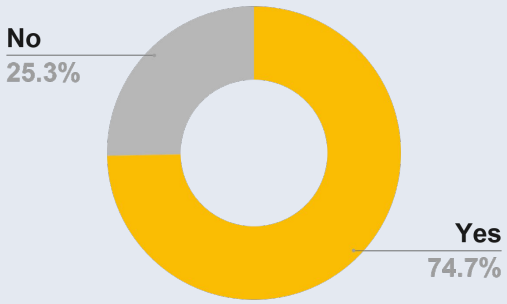
At the same time, **equipping vehicles with screens does not automatically translate into meaningful usage.** Hardware, in this context, is only an entry point. The real determinant of engagement lies in the quality, accessibility and relevance of the services available, making content strategy and user experience design central to OEM differentiation.

2. App Ecosystems: Growing Access, But Fragmented Usage

Most drivers with in-car screens also have access to apps. Among them, 75% report using in-car apps, showing that app ecosystems are now a core part of the driving experience.

ACCESS TO BUILT-IN SCREEN APPS

Do you have access to apps on the car screen?



Base: 1,384 adults with a built-in screen in the UK, France and Germany interviewed in February 2026 - Dataxis ©

Yet adoption is not universal: 25% of users with screens do not use apps, a figure that rises to 35% among older drivers (56+) and drops to 17% among younger users (18–35).

Today, the ecosystem remains heavily smartphone-dependent. Approximately 73% of app users rely on smartphone mirroring, a trend that remains stable even in newer vehicles (74% for cars aged 1–3 years). Usage is slightly higher among iPhone users (77%) than Android users (70%), reflecting small differences in ecosystem integration via Apple CarPlay and Android Auto.

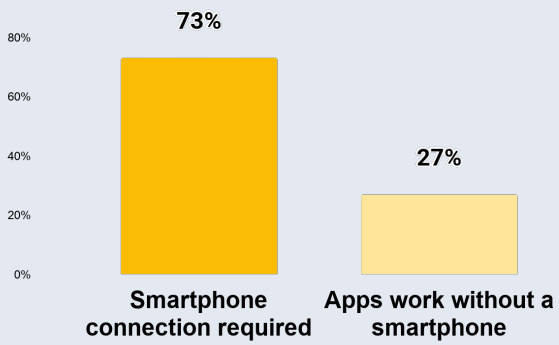
Germany leads as the most advanced market for native, embedded app usage, as 29% of respondents report an access to apps that function independently of smartphones.

While smartphones remain the primary gateway to apps, OEMs and suppliers are steadily building independent in-car ecosystems, supported by platforms such as Google Play, Harman, and Appning.

Despite these aggregators, OEMs retain ultimate control, deciding which apps are distributed, how they are curated, and how prominently they are featured. As a result, the in-car app ecosystem remains highly fragmented, with significant variation across brands.

ACCESS TO APPS BY TYPE

How do you access apps on the car screen?



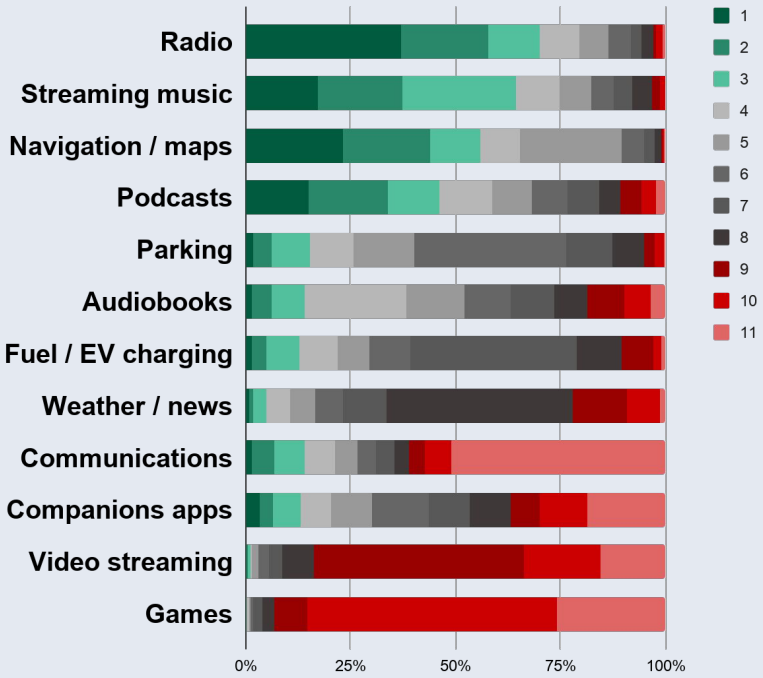
Base: 1,033 adults with access to apps in the UK, France and Germany interviewed in February 2026 - Dataxis ©

3. App Preferences: Audio Dominates, Video And Gaming Remain Peripheral

When looking at actual usage, a clear hierarchy emerges. Audio services dominate the in-car experience, reflecting the constraints and expectations of a driving environment. **Radio and music consistently rank among the most valued applications, with navigation completing the core trio of essential services.**

MOST IMPORTANT IN-CAR APPS

Which in-car app categories are most important to you? Please rank from most important to least important.



Base: 1,033 adults with access to apps in the UK, France and Germany interviewed in February 2026 - Dataxis ©

Radio ranks among the top three most important app categories for 70% of users, while music follows at 64%.

At the other end of the spectrum, more immersive formats such as video streaming and gaming remain niche use cases: 88% of respondents rank games among the least important app categories and video streaming is similarly deprioritized by 84% of respondents.

These results highlight a fundamental reality: the **car remains primarily a mobility environment, where passive, low-attention content (audio) aligns best with user needs.**

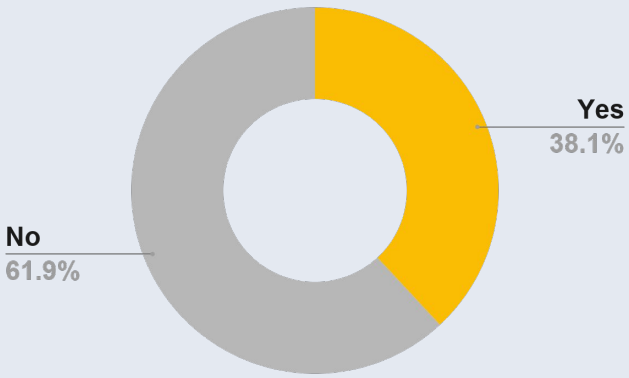
However, this hierarchy is not fixed. **Usage expectations vary significantly depending on: Vehicle type (premium vs mass market); Passenger composition (presence of children); Context of use (driving vs waiting vs charging).** For OEMs, this creates a strategic imperative: balance essential services with a broader, more diverse app offering, ensuring relevance across multiple use cases while maintaining a coherent user experience.

4. Video Adoption: Latent Demand Driven By Exposure And Premium Positioning

At present, consumer interest in in-car video remains limited, with **62% of respondents expressing no interest in video apps while parked.**

INTEREST IN VIDEO APPS WHILE PARKED

Would you like access to video apps you already use, while the car is parked?



Base: 2,367 adults with a car in the UK, France and Germany interviewed in February 2026 - Dataxis ©

However, this headline figure masks important pockets of growth. Interest rises to 60% among premium car owners. It climbs to 53% among owners of vehicles aged 0 to 3 years. In the UK, it reaches 76%.

This suggests that exposure is a key driver of adoption. **Users who have experienced advanced in-car services demonstrate significantly higher interest, indicating that demand is not absent, but rather still emerging.**

For content providers, this creates both opportunity and complexity. While the long-term potential is clear, the fragmented nature of in-car ecosystems requires significant adaptation and investment, slowing large-scale deployment.

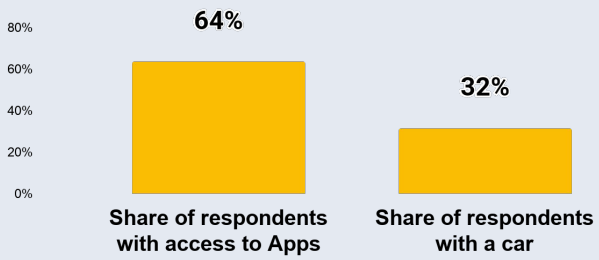
5. Voice Assistants: High Satisfaction, But Limited Penetration

Voice assistants are becoming an increasingly important interface within vehicles. **Among drivers with built-in screens, 64% report having access to a voice assistant,** with the highest penetration observed in France (71%).

Adoption is significantly higher in newer and electrified vehicles, since it reaches 76% in cars under 3 years old, 80% in electric vehicles and 75% in hybrids.

VOICE ASSISTANT PENETRATION

Does your car have a built-in voice assistant?



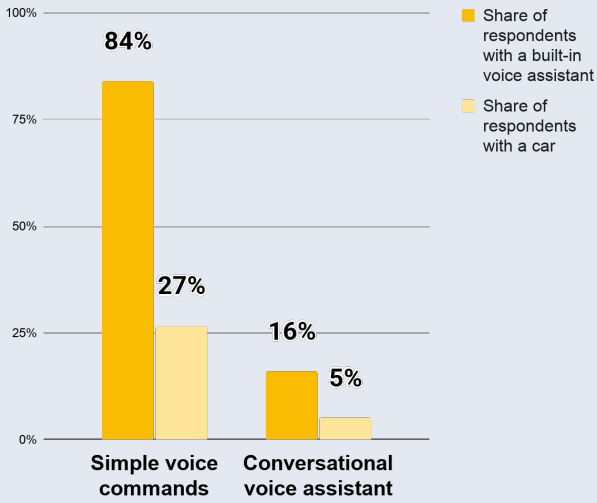
Base: 1,033 adults with access to apps in the UK, France and Germany interviewed in February 2026 - Dataxis ©

However, **across the entire car parc, penetration remains limited at 32%.**

AI-powered assistants are still in their early stages: only 5% of car owners report having AI-enabled voice assistants. It is equivalent to 16% of users with voice assistants.

VOICE ASSISTANT TYPE USED

Which type of voice assistant do you use?



Base: 750 adults with a built-in voice assistant living in the UK, France and Germany interviewed in February 2026 - Dataxis ©

Despite this low penetration, **user satisfaction is exceptionally high (94%), indicating strong perceived value among those exposed to the technology.**

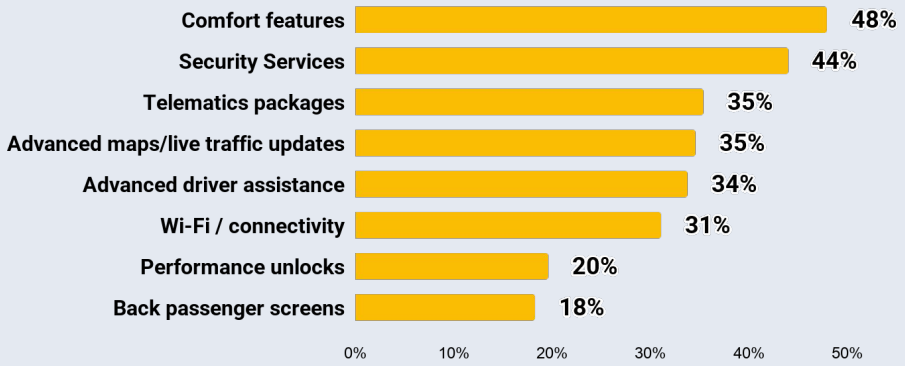
The next phase of development is already underway. OEMs and technology players, including Ford Motor Company and General Motors, are introducing AI-powered assistants. These systems aim to transform voice into a primary interaction layer, capable of managing both vehicle functions and app ecosystems.

6. Monetization And Advanced Services: Strong Potential, Uncertain Demand

Automakers have multiple levers to expand in-car services and enhance user experience. However, as shown in survey results **adoption of advanced features remains below 50% across all categories, indicating that the market is still in an early phase.**

PREMIUM FEATURES PENETRATION

Do you have access to any of these services?



Base: 2,367 adults with a car in the UK, France and Germany interviewed in February 2026 - Dataxis ©

Geographical differences further nuance this landscape.

Germany stands out for higher adoption of comfort (64%) and security-related features (58%), while France lags behind across most service categories (<35% across services), pointing to differing levels of user readiness across markets.

The most widely adopted category overall remains comfort features, prioritized by 48% of respondents.

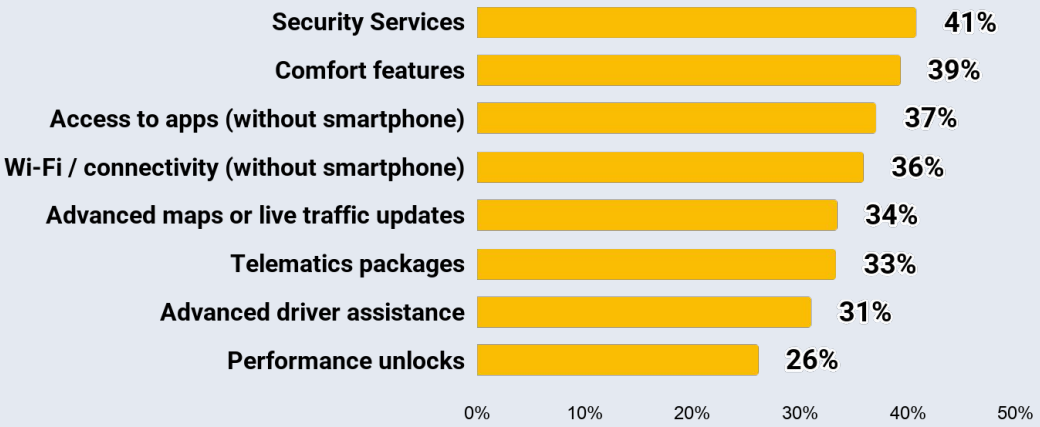
Beyond core services, connectivity itself remains underdeveloped, with less than a third of users actively engaging with in-car connected features.

Rear-seat entertainment through back passenger screens, often associated with video consumption, shows the lowest levels of adoption across all markets, aligning with the limited perceived importance of video in the in-car context today. It reaches 24% in the UK, 17% in Germany and only 15% in France.

Crucially, **availability does not equate to perceived value. While comfort features are the most widespread, security services rank highest in willingness to pay (41% of respondents), suggesting a stronger perceived utility**.

READINESS TO PAY FOR PREMIUM FEATURES

Would you be ready to pay for these services?



Base: 2,367 adults with a car in the UK, France and Germany interviewed in February 2026 - Dataxis ©

The ability to access apps without a smartphone ranks third in willingness to pay (37%), signaling a key expectation for the future for seamless, integrated experiences. At the same time, its strategic importance suggests that OEMs may ultimately choose to include it as a standard offering, as they seek to reduce dependence on external ecosystems such as Android Auto and Apple CarPlay.

The in-car digital ecosystem is in its pivotal phase. While screens and app platforms are now widely deployed, true engagement remains uneven, constrained by fragmentation, limited awareness, and varying user needs. At the same time, emerging technologies, in particular AI-powered voice assistants and native app ecosystems, are redefining the role of the car as a connected digital environment.

Looking ahead, three dynamics are expected to shape the market. **First, fleet renewal will be the primary driver of scale, gradually increasing the addressable base for advanced services. Second, OEMs will need to strike a balance between control and ecosystem partnerships, as competition with technology players intensifies. Third, user expectations will evolve rapidly as exposure increases, particularly in premium segments, accelerating demand for richer and more seamless experiences.**

Ultimately, success will depend not only on technological deployment, but on the ability to deliver coherent, intuitive, and differentiated in-car experiences, transforming the vehicle from a transport tool into a fully integrated digital platform.

Access the full survey results

What else can you get with the full results?

You will get access to the full version of the survey, covering 23 questions specifically designed to understand the state of the in-car entertainment markets across 3 key European countries.

You will get access to filtering possibilities based on the profile and on the previous responses of users to be able to understand as deeply as possible the profile of users who are interested in specific services, or who are already using specific services.

How to access the full results of the survey?

If you'd like to explore the full results or have any questions about the document, feel free to reach out to our sales specialist Matthieu Danicourt (matthieu.danicourt@dataxis.com). He'll be happy to guide you through everything and help you get the most out of it.

Which other data points can cover market research needs related to in-car infotainment markets?

Dataxis also provides a range of market research datasets to understand the level of addressability for advanced digital services with details by brand, country, and a detailed mapping of the current offers of OEMs within cars.

The list of modules offered by Dataxis are covering the following topics:

- **In-Car Infotainment Installed base**: current snapshot and forecasts of the amount of cars which can be addressed with digital apps and services
- **OS / App Aggregators**: tracking of 3rd party App store and Infotainment base used by brands across Europe and North America
- **Connected Cars Forecasts by Brand**: current snapshot and forecasts of the amount of cars offering in-car connectivity with a distinction between 4G and 5G
- **Apps Reach by Car Brand**: list of audio and video apps distributed by OS and Aggregators, with the reach provided by each App Aggregator within each car brand and country covered.

About the survey

Survey Key Characteristics

Sample size: 3,000 respondents surveyed online
Geographic scope: France, UK, Germany
Fieldwork period: January and February 2026
Online panel balanced to national Census for age and gender

Survey Overview

Between January and February 2026, Dataxis conducted a comprehensive consumer survey involving 3,000 respondents in France, the UK and Germany. The primary objective of this research was to gain a deeper understanding of consumer choices and behaviour related to in-car infotainment equipment, access and preferred services.

The study was designed to explore how consumers access in-car screens and applications, the applications and services that hold most value in their opinion and their willingness to pay for a range of advanced digital services that could be provided within the car. By integrating these themes within a single survey and collecting responses from the same participants, the research enables cross-analysis by user profile, car brand, car model and în-car app preferences. This integrated approach provides a highly granular view of media consumption patterns, allowing results to be segmented based on detailed user profiles within each country.

About Dataxis

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Dataxis is a global firm specialized in media, telecom and digital market research and conferences. More than 50 markets, 200 countries and 5000 companies are tracked every quarter now.
Since 1994, the search for gathering detailed data led us to review every reputable source of information we could find and to set up a strong team of analysts. Supported by a reliable methodology, we collect, check and update thousands of data and forecasts using our powerful business intelligence platform. For more than 25 years, we have successfully provided our data and forecasts on a subscription-based model to the leading actors of the TV, Telecom and digital industry.

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