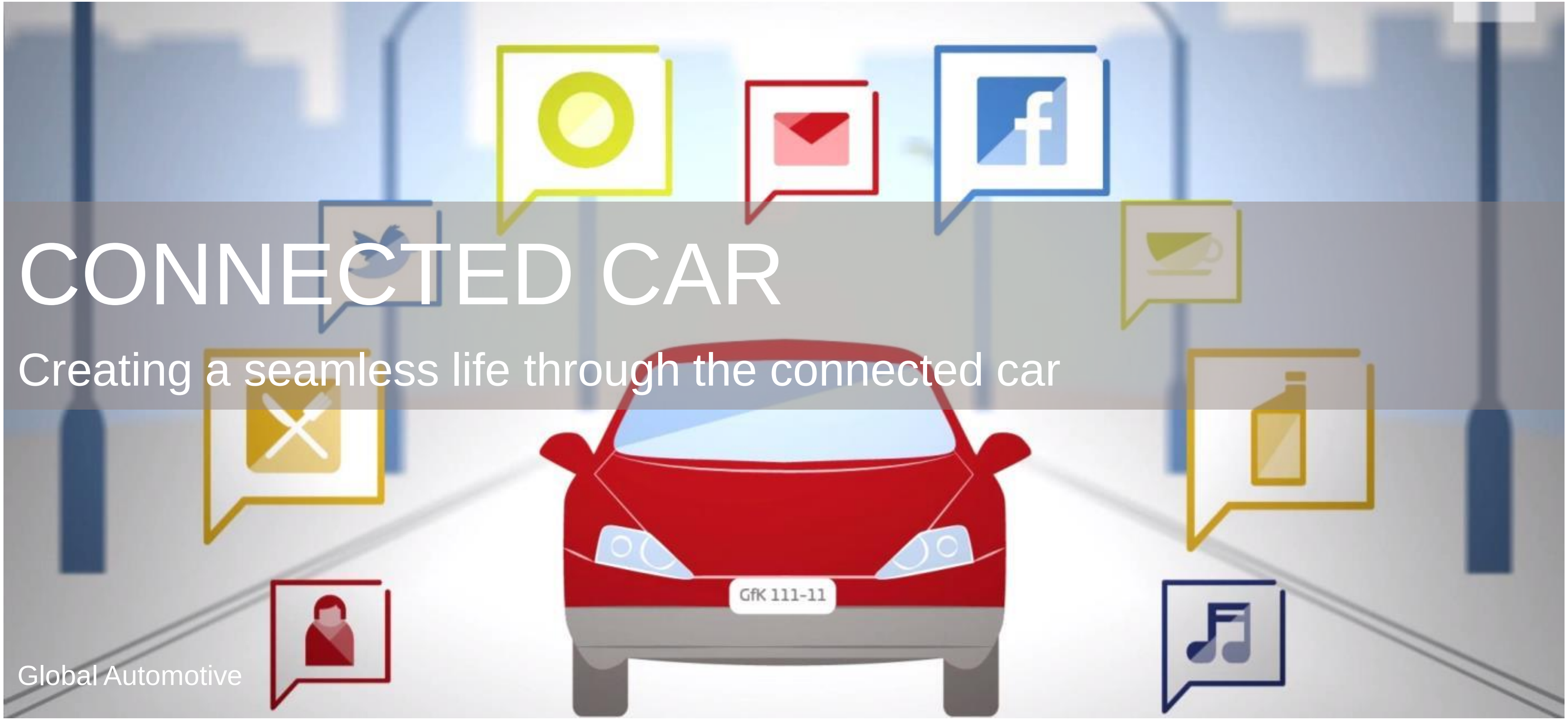
# CONNECTED CAR

## Creating a seamless life through the connected car



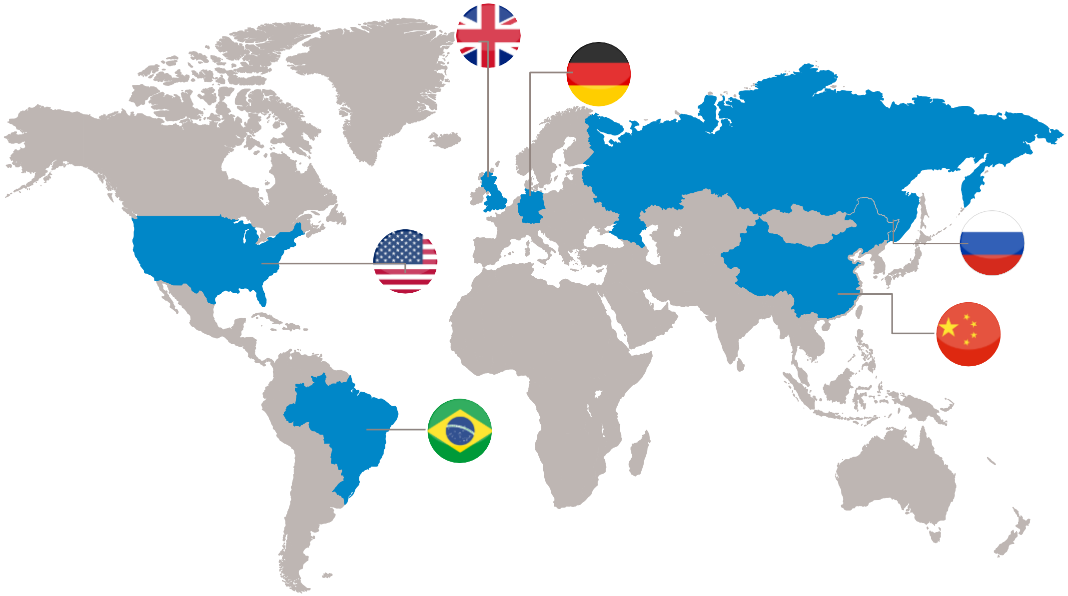

Global Automotive

# GfK's connected car study at a glance

## 6 Markets
Brazil, Germany, Russia, UK, USA, China

## 5,800 Interviews

## Online
Methodology



~1,000 interviews per market

# Study objectives

What concerns do consumers have about driving that connected cars can address?

How do consumers feel about autonomous driving?

How do consumers react to other connected car concepts?

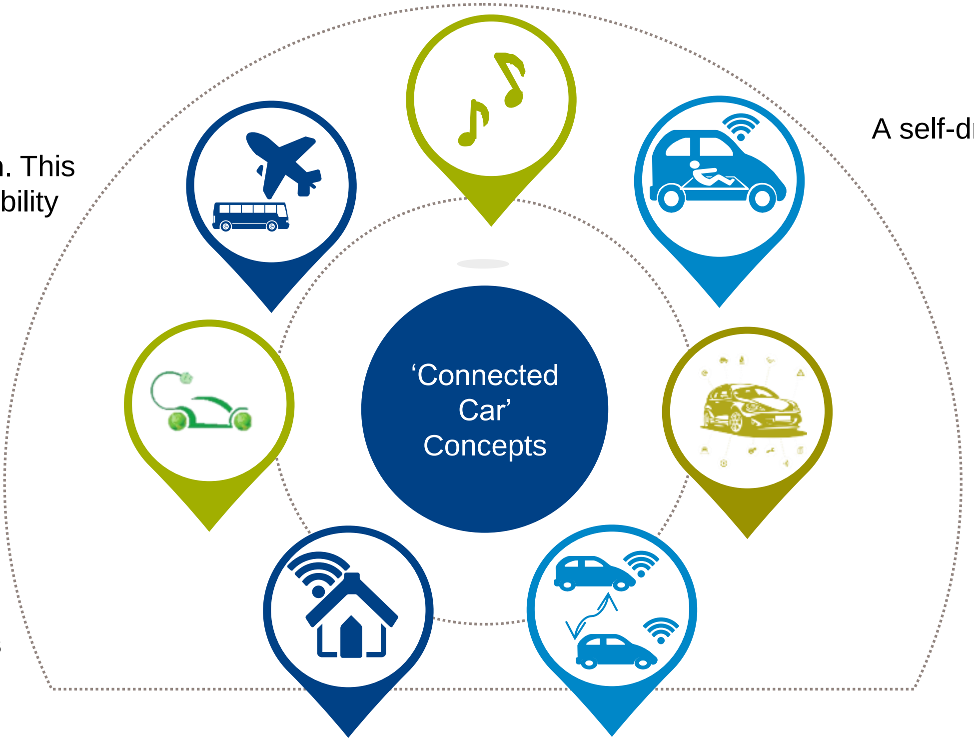
What connected car features are more and less desired?

What cultural differences should be considered?

# We asked 5,800 consumers to evaluate 7 concepts

1: Entertainment

A car that knows **your entertainment preferences**




2. Autonomous Driving

A self-driving car that drives completely **autonomously**

3. Data Tracker

A car that **tracks usage**, **runs diagnostics**, checks repair costs; **records** automatically accident **data**

4. Ultra Safe

A **car that makes driving as safe as possible.** Connectivity with other cars, cruise control, integrated cameras

5. Life Manager

A **car that communicates with other connected devices in your home**

6. Self Sufficient

A strong but **light electric car**

7. Home to destination Travel Solution

**Not a car but a travel solution**. This app will take complete responsibility for a trip, identifying the best transport solution

# We also asked them about…

…their current ownership and usage of vehicles as well as perception on future transport solutions

### Drivers' main concerns & needs

### Emotional state of drivers and passengers

### Car usage – by both drivers and passengers

### Expectation to commute in 5 years time

### Interest in purchasing specific features

### Attitudes towards car sharing

## …and much more.

# Study results

# People Still Love Driving!

# Top emotions associated with driving are POSITIVE


Base: All drivers (n=4375)
QP5a: Feelings/emotions when driving

# Across countries most of the drivers feel…HAPPY

## Happy drivers % per country

Germany 68%

Brazil 62%

China 62%

Russia 54%

US 50%

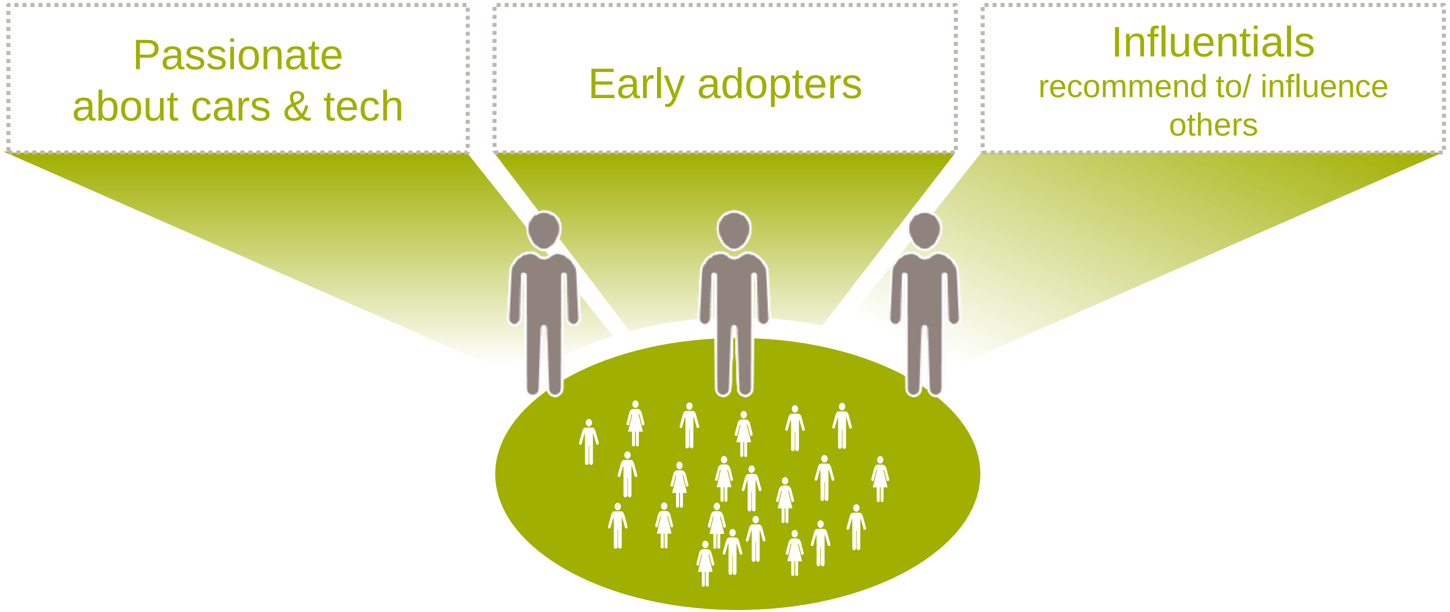
UK 43%



Base: All drivers (n=4392); Scale: 5 Point. Data is Top 2 Box QP5a: Feelings/emotions when driving

# Who are the most likely early adopters of new ‘Connected Car’ technology?

# Leading Edge Consumers (LEC) will strongly shape the future

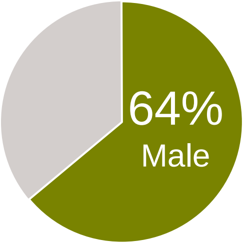



They are early buyers, who are passionate
about the auto-tech industry, and they influence others.

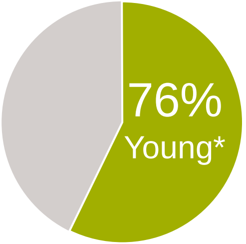
# Leading Edge Consumers, 20% of the sample, are influential early adopters with a strong interest in new auto-technology ideas

## Leading Edge Consumers

### Differentiating Demographics

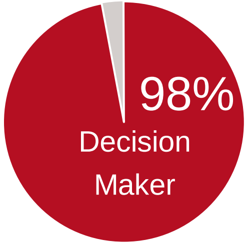



vs. Total 51%




vs. Total 62%


vs. Total 52%




vs. Total 91%

## Differentiating Driving Preferences for LEC

98%
Enjoy Driving

83%
Drive a New Car

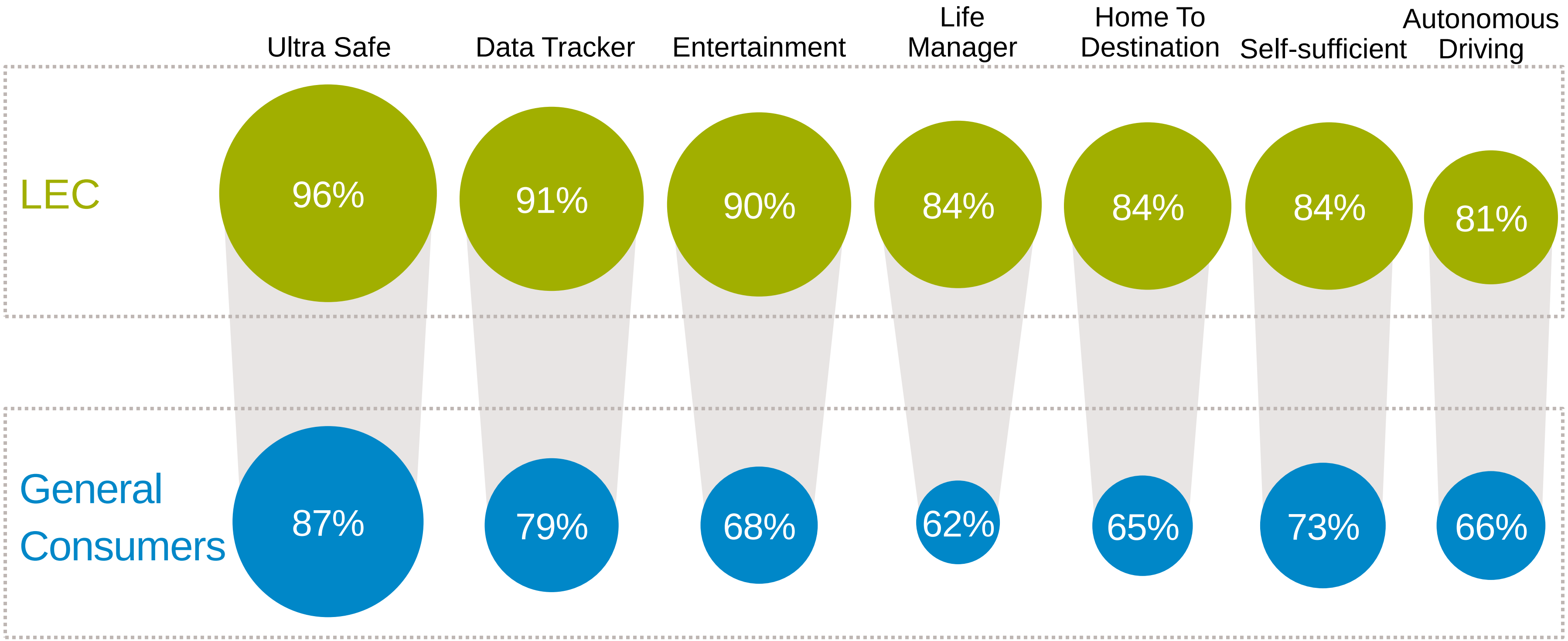
30%
Drive Just For Fun

49%
Heavy Drivers (7h+)

| | Enjoy Driving | Drive a New Car | Drive Just For Fun | Heavy Drivers (7h+) |
|---|---|---|---|---|
| Vs. Total | 64% | 66% | 19% | 31% |

*Between 16-45 years old

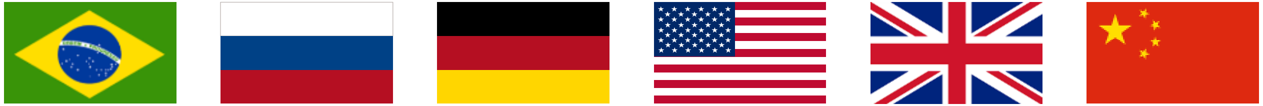
# Leading Edge Consumers leaning in to connected cars




As expected Ultra Safe concept is the most appealing. As safety is a 'hygiene' factor, we want to focus on concept that follow next.

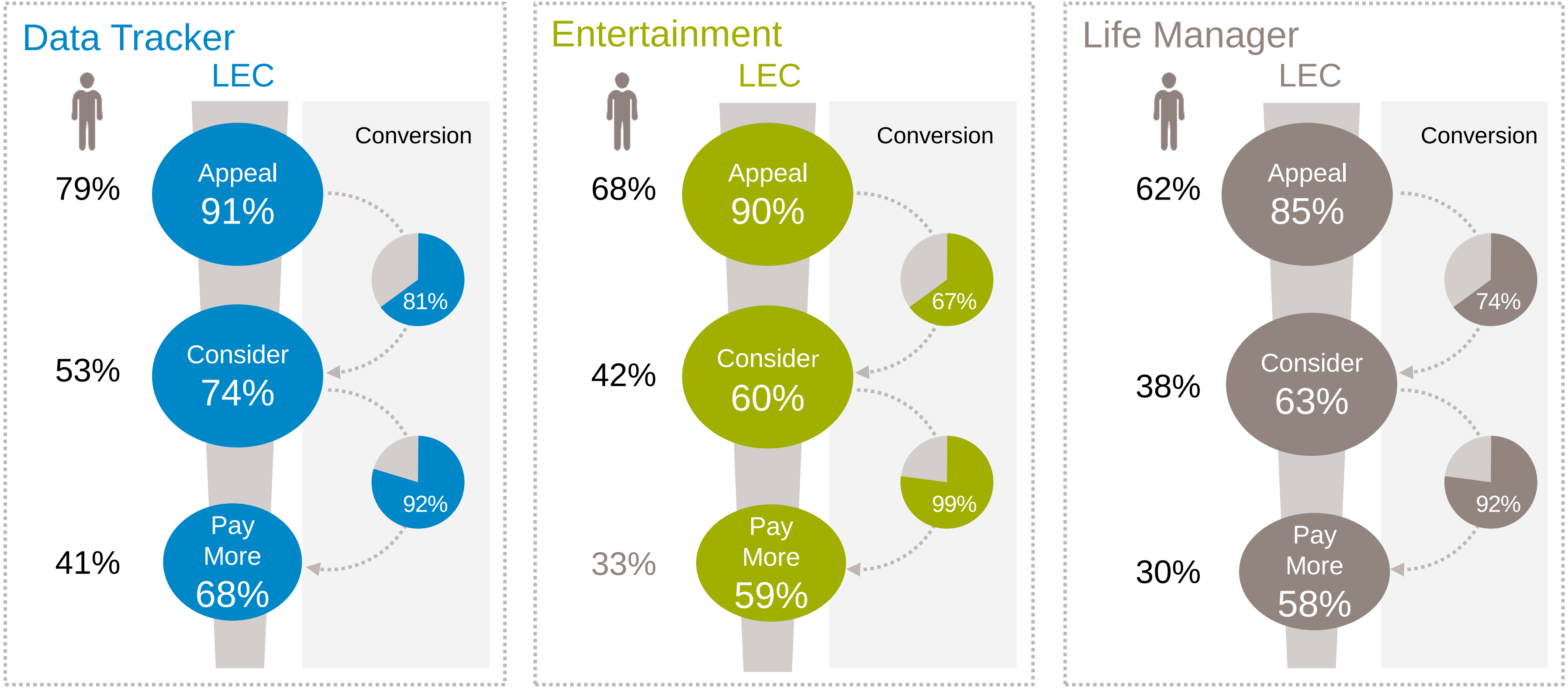
# For American Leading Edge Consumers Entertainment rules among all following closely Ultra Safe concept

## Autonomous Driving is the Least Appealing Concept (especially in Europe)…but apart from China

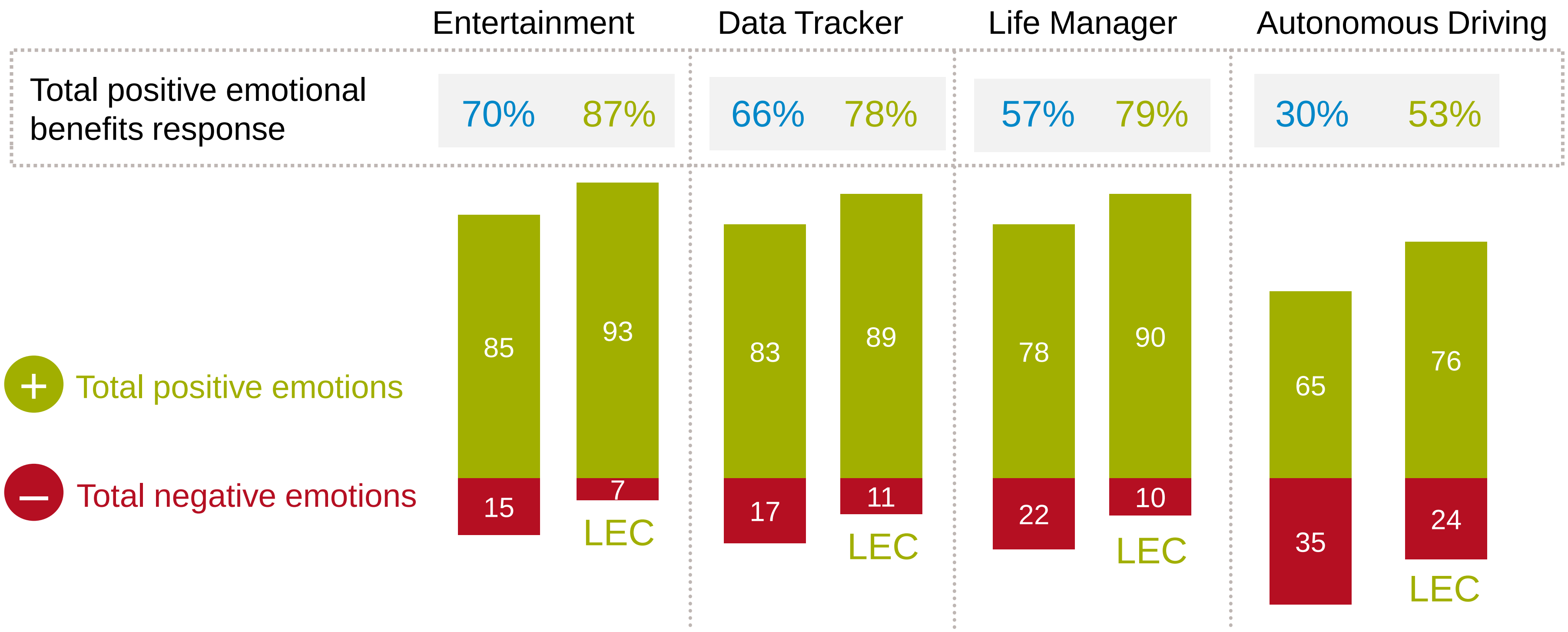


| | | | | | | |
|---|---|---|---|---|---|---|
| + Most Appealing T2B | Data Tracker 85% | Data Tracker 71% | Data Tracker 60% | Entertainment 78% | Data Tracker 62% | Data Tracker& Autonomous 83% |
| Ultra Safe: | 87% | 80% | 81% | 80% | 71% | 95% |
| – Least Appealing B2B | Autonomous Driving 11% | Autonomous Driving 22% | Autonomous Driving **34%** | Autonomous Driving 17% | Autonomous Driving **25%** | Autonomous Driving 6% |

# LEC value Entertainment but still are willing to pay more for Vehicle Data Tracking technology products

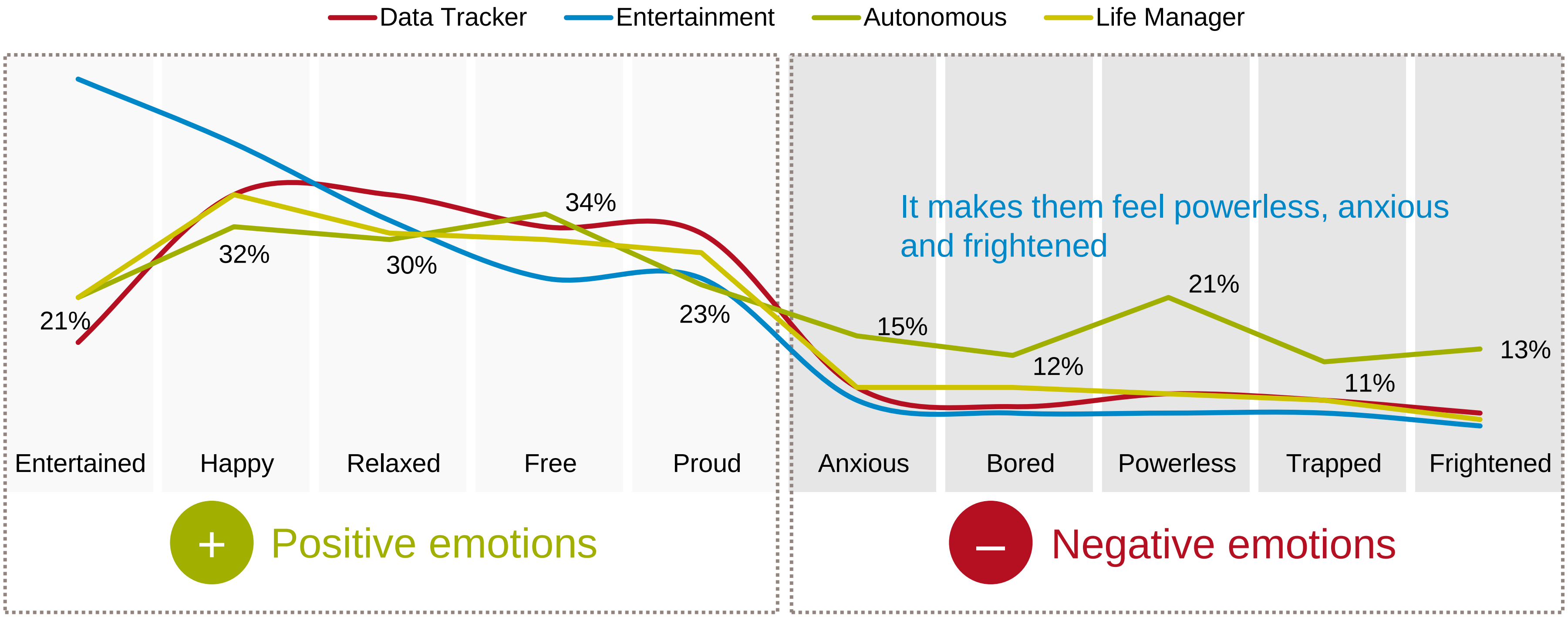


# Entertainment leads on emotional benefits (%)



# Why drivers don't like autonomous driving?

## LEC



# There is also some practical strong barrier for autonomous driving

No more appealing if could not use one after drinking alcohol

65%

Especially for females

71%
Female

60%
Male

Non-premium drivers

65%
Non-Premium

57%
Premium

and in the US

69%

68%

66%

64%

61%

68%

# Top 3 auto & top 3 tech connected car brands of the future in the mind of consumers per country

# Key takeaways

## Autonomous driving finds yet low acceptance

| What? | So What? | Now What? |
| --- | --- | --- |
| Ownership and usage of own personal car maintains key individual mobility concept for consumers – still strong positive attitude. | Drivers are not yet ready for inter modular mobility – car sharing and public transport still not a major option. | The car needs to fulfill a wide range of consumers needs and provide benefits as well as relieve concerns.. |
| Openness towards concepts on connectivity in cars given across markets. Data Tracker, Entertainment and Life Manager of highest interest. | Concepts support feeling of safety and enjoyable driving. Increase efficiency on current ride and future rides. | Ensure to save time and money. |
| Autonomous driving of highest concern. | Low acceptance across markets except US & Brazil. | Means high challenge for manufacturers and government. |

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Responding to the wide-ranging transformative change in the automotive industry with consumers' changing desire and digital demands, automotive companies need the insights as foundation of winning strategies that ensure competitive differentiation through distinctively engineered and designed products and services.

GfK's automotive industry experts provide insights into today's markets and consumers' demand of tomorrow by looking at consumer, retail and media data. Combining deep global industry skills with proven market research expertise, we turn research into smart business decisions for automotive companies to create winning strategies that translate into revenue.