

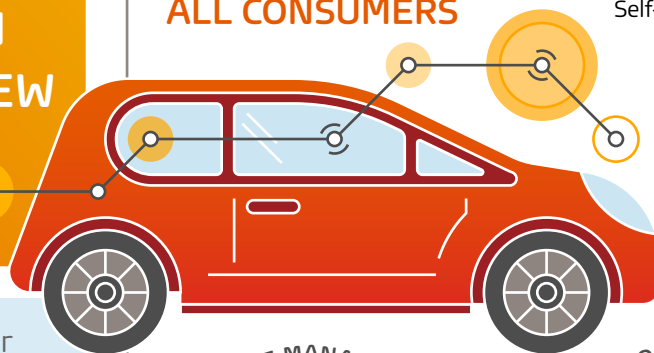
# HOW LEADING EDGE CONSUMERS ARE DRIVING THE CONNECTED CAR MARKET



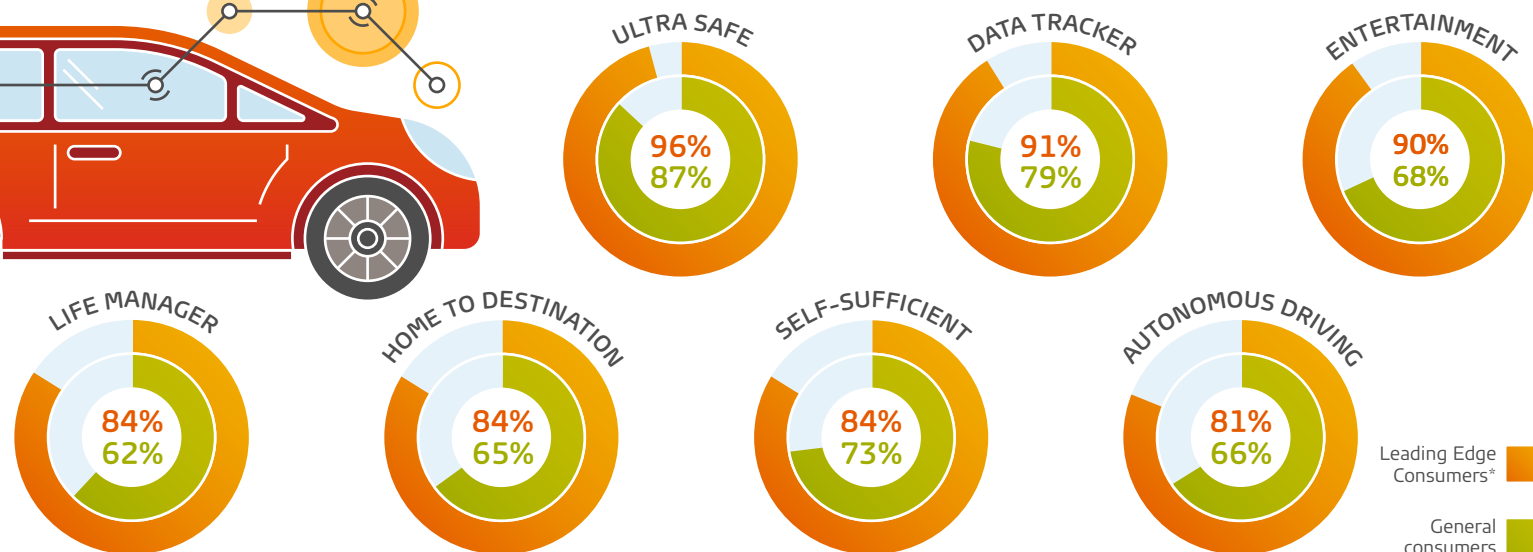
## WHAT REALLY MATTERS TO DRIVERS WHEN CHOOSING A NEW CONNECTED VEHICLE?

The technology exists for cars to be connected – from self-parking to automatic driving to a wifi-enabled entertainment hub. But are these features being pushed at uninterested drivers, or is there a real demand for the safety and entertainment features offered by connected cars? People in Brazil, Germany, Russia, UK, US and China shared their views with us.

## EVALUATING SEVEN CONNECTED CAR CONCEPTS ACROSS ALL CONSUMERS

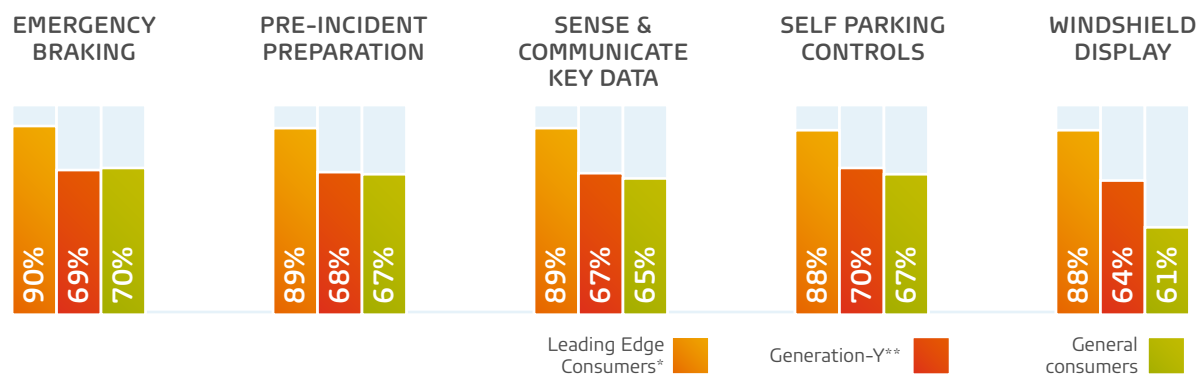


Ultra Safe, a car that makes driving as safe as possible took poll position. Data Tracker, a car that tracks usage, runs diagnostics, checks repair costs and automatically records accident data, took second place. This was followed by Entertainment, a car that knows your entertainment preferences; Life Manager, a car that communicates with other connected devices in you; Home To Destination, not a car but a travel solution; Self-Sufficient, a strong but light electric car; Autonomous Driving, a car that drives completely autonomously.



## TOP FIVE SAFETY FEATURES ARE APPEALING TO ALL DRIVERS

Leading Edge Consumers\* have embraced the concept of new safety features the most, but interest is high for all consumer groups.



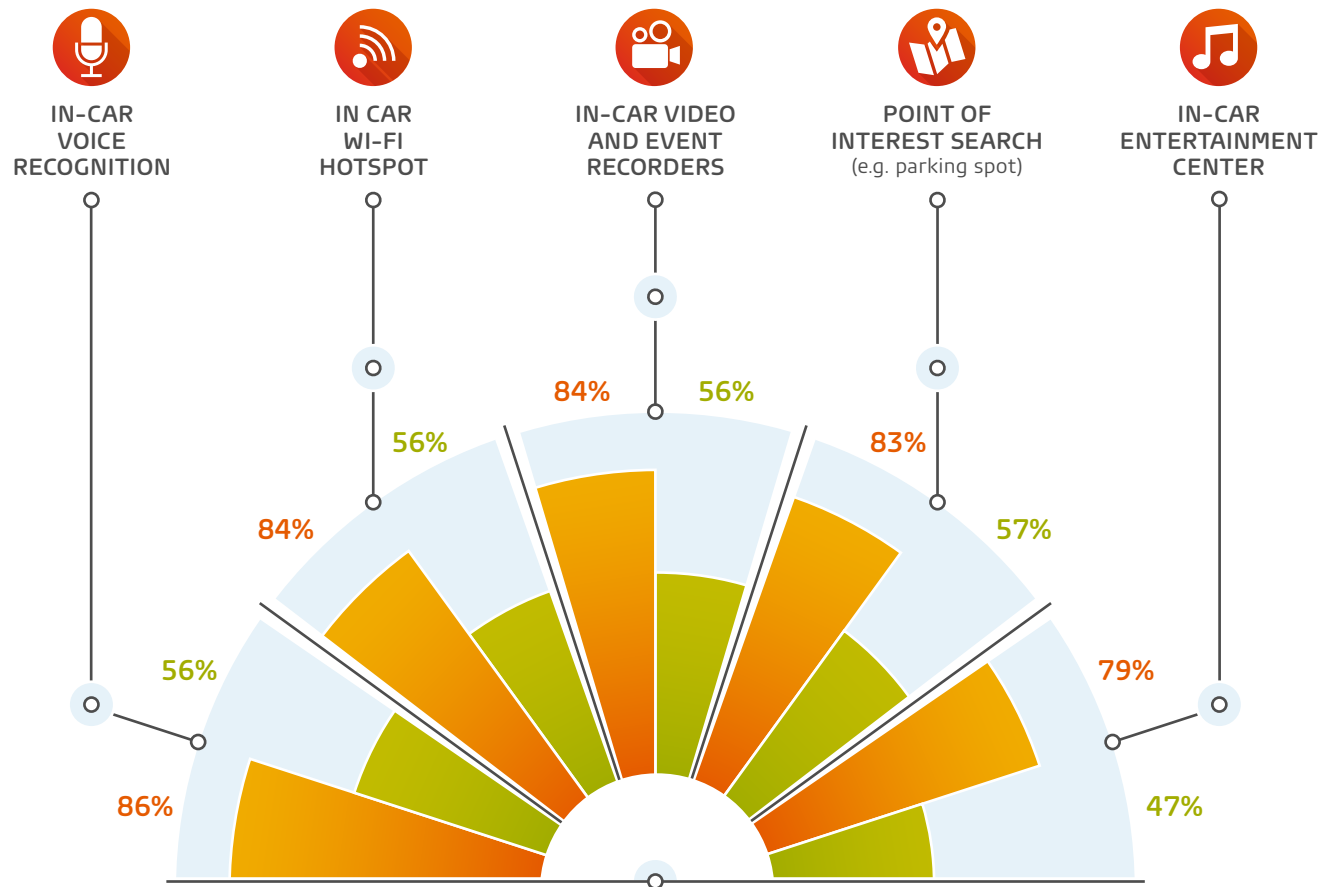
# HOW LEADING EDGE CONSUMERS ARE DRIVING THE CONNECTED CAR MARKET



## ENTERTAINMENT AND CONNECTIVITY APPEAL TO LEADING EDGE CONSUMERS

A range of entertainment and connected facilities in cars scored highly with Leading Edge Consumers. Although other drivers are currently less inspired by these features they will follow – in time.

Leading Edge Consumers\* ■  
General consumers ■

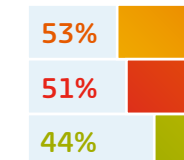


## IS PAY AS YOU GO THE FUTURE?

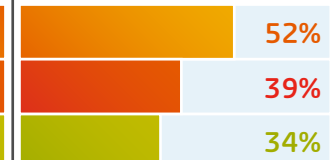
Leading Edge Consumers are drawn to alternative ownership models such as car-pooling and pay as you go. Generation Y consumers and average new car buyers are less keen – car manufacturers and service providers have to work harder to convince people to part with their cars.



### CAR POOLING



### PAY AS YOU GO



Leading Edge Consumers\* ■

Generation-Y\*\* ■

General consumers ■

We interviewed 5,800 consumers in Brazil, Germany, Russia, UK, US and China. Fieldwork was conducted up to November 2014.

\* To qualify as a Leading Edge Consumer, people must meet at least two of the three criteria: early adopter, influential and passionate about shopping.

\*\* Generation Y consumers (also often referred to as Millennials) followed the consumer segment known as Generation X. The children of Baby Boomers or Generation X, they will have been born between 1982 and 2000 and are an attractive target audience for brands.

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