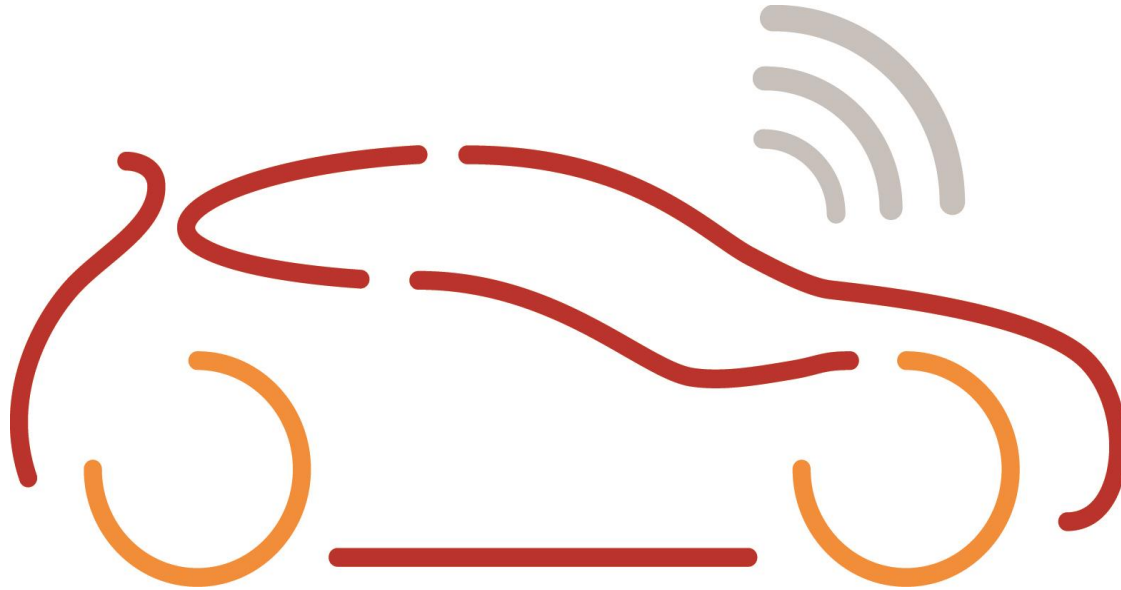


Connected Car Campaign Results overview



Study objective

To explore the drivers' engagement and experience of connected car features.



TNS/BearingPoint connected car study at a glance

1

7 European markets:

-  UK
-  France
-  Germany
-  Spain
-  Italy
-  Netherlands
-  Nordics

2

3700 connected car drivers across Europe



3

Brands covered



We asked participants about...



Awareness

- Awareness of connected car features
- Consideration of connectivity at purchase
- Demo / explanation of connected car features by dealer
- Benefits of connected car features



Buy and collect

- Choice of connected features
- Registration / activation experience
- Renewal payment for features



Use

- First user experience of connected features
- Stage of the journey features used



Service

- Issues with connected features
- Support services experience

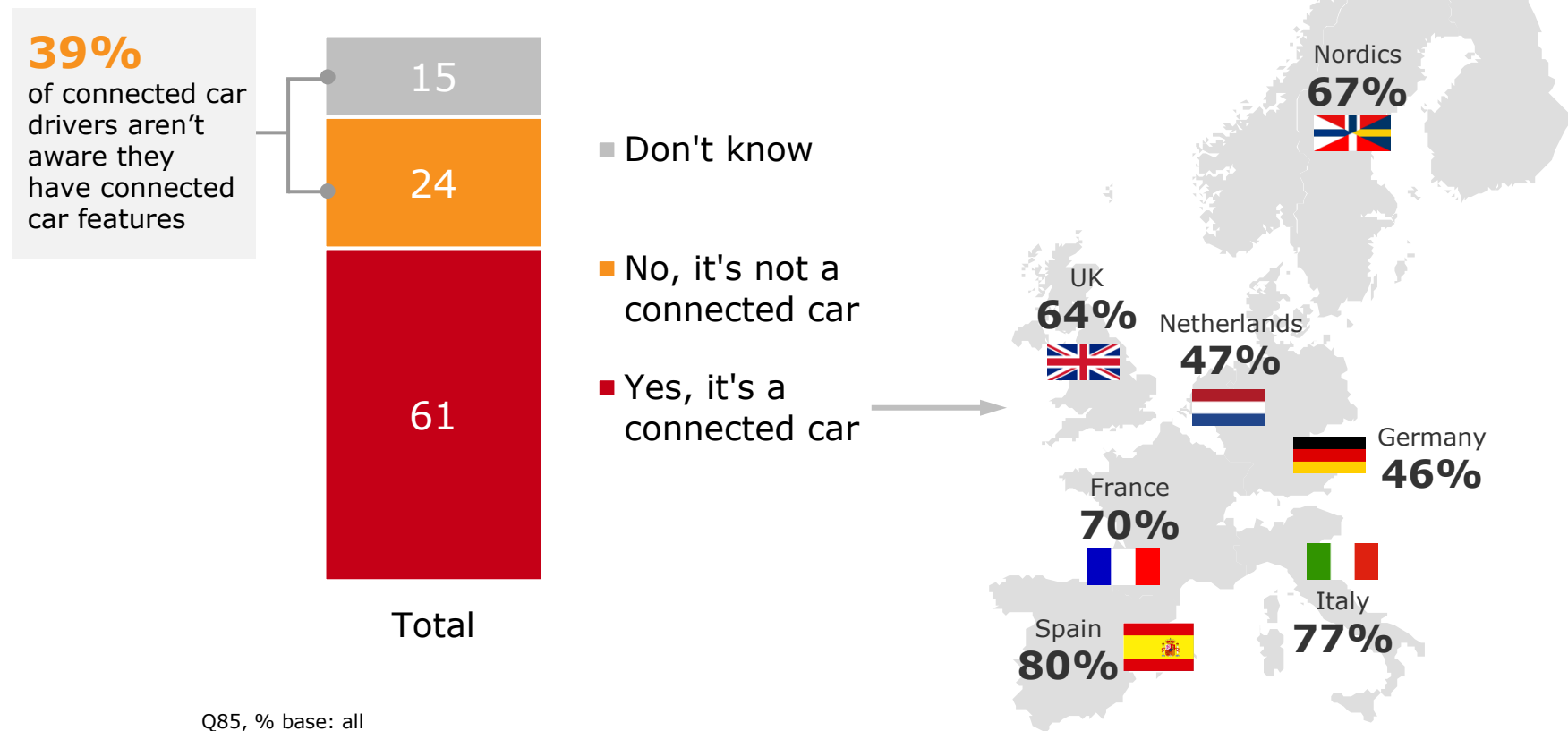


Renew/recommend

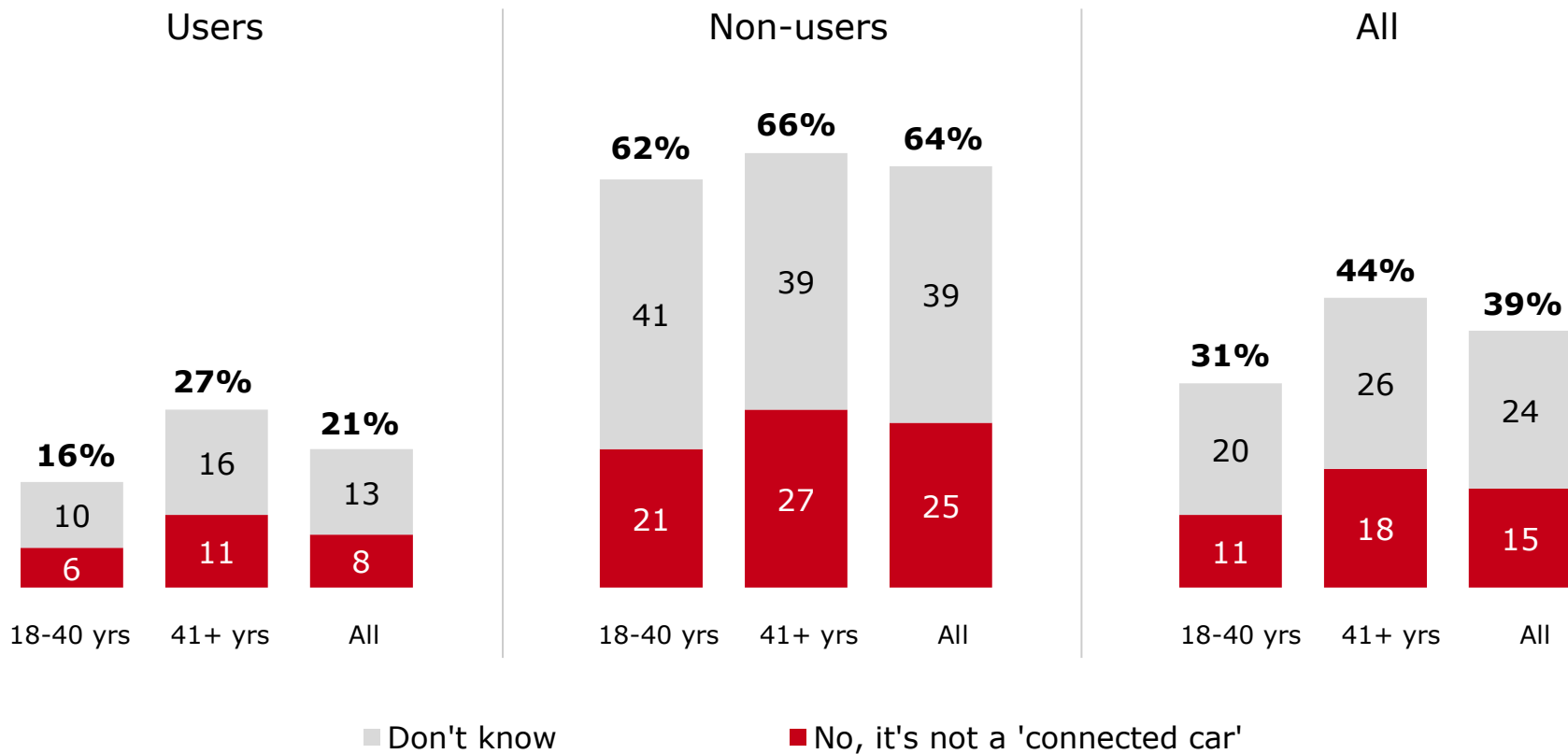
- Plans to renew connected services
- Intention to recommend connected features

There is a lack of awareness of connected features among connected car drivers

Do you know if your car has connected features?



Lack of awareness of connected features among connected car drivers by age group

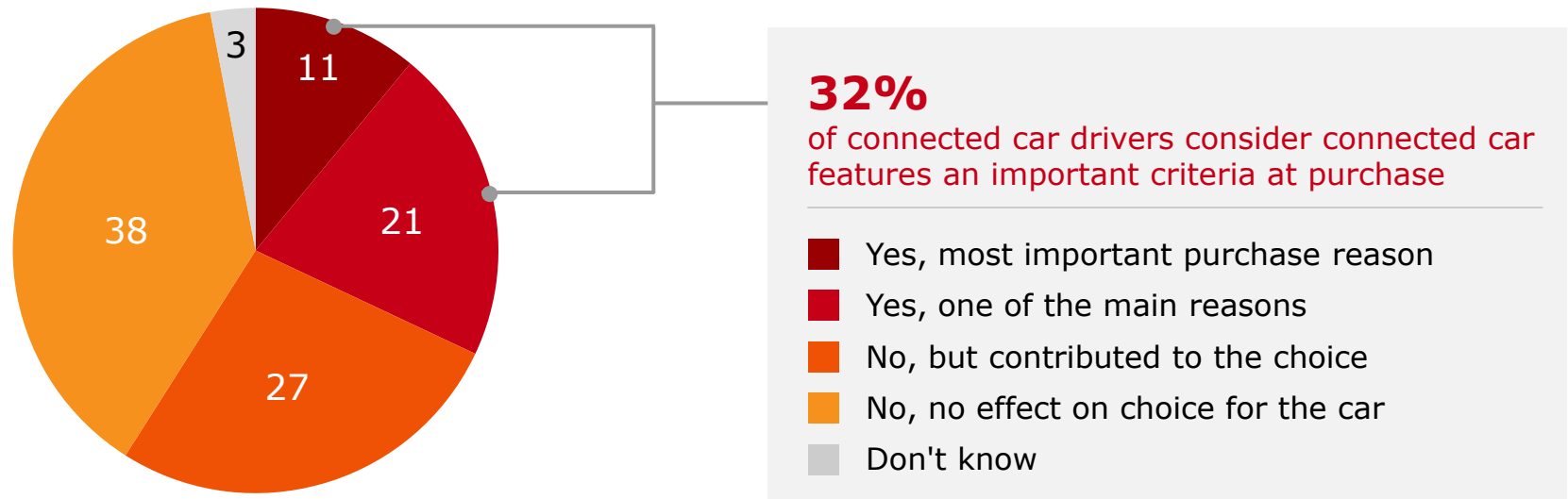


But all survey participants owned a connected car!



1/3 of buyers already consider connected car features an important criteria during their path to purchase

The connected features play an important role in the purchase of a third of cars, especially young buyers and premium brand owners.



Q100, % base all

Main benefits of connected cars: safety, navigation and driver behaviour

When you think of connected cars in general, what do you see as the main benefits of a connected car?



Safer journeys through automatic warnings about potential hazards



62



Internet-enabled navigation to tell me where I'm going



62



Understanding of fuel consumption/driving habits etc. through monitoring services



55



Access to better in-car entertainment and streaming media



40

Q90 % base all

Opportunity: demonstration of connected features at purchase by market

When you considered to purchase the car, were any of the connected features demonstrated to you?



Missed opportunity
39% of car buyers didn't have connected car features demonstrated to them



UK
38%



France
33%



Germany
47%



Italy
24%



Spain
19%



Netherlands
57%



Nordics
44%

Q130 % base all

Q130 % base all

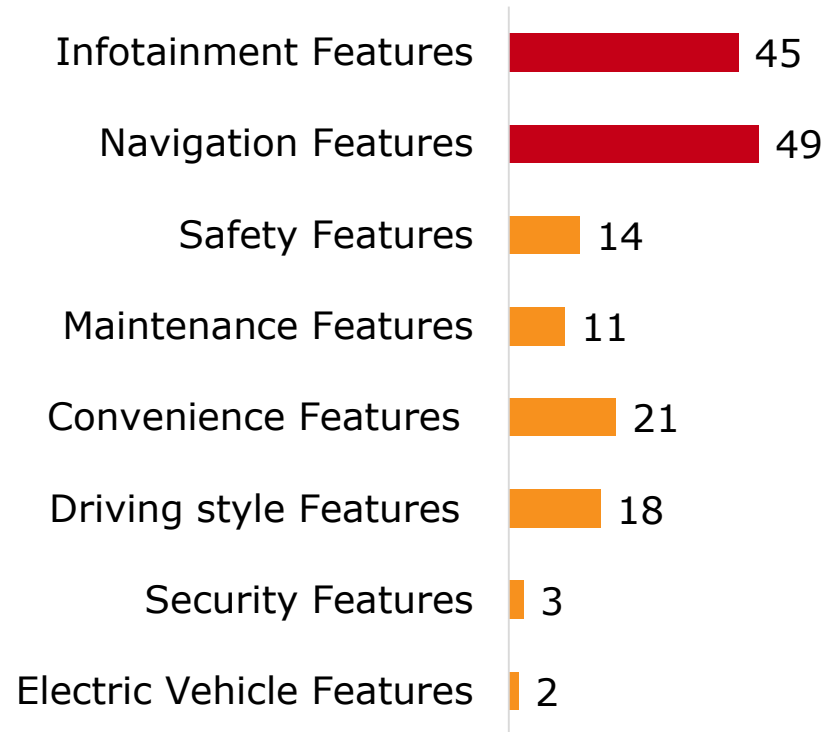


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Navigation and infotainment considered most relevant connected car services at purchase

Which of the connected car features were relevant to you when purchasing a car



Room for improvement in ratings of connected features by active users

Rating of connected features on aspects



Users

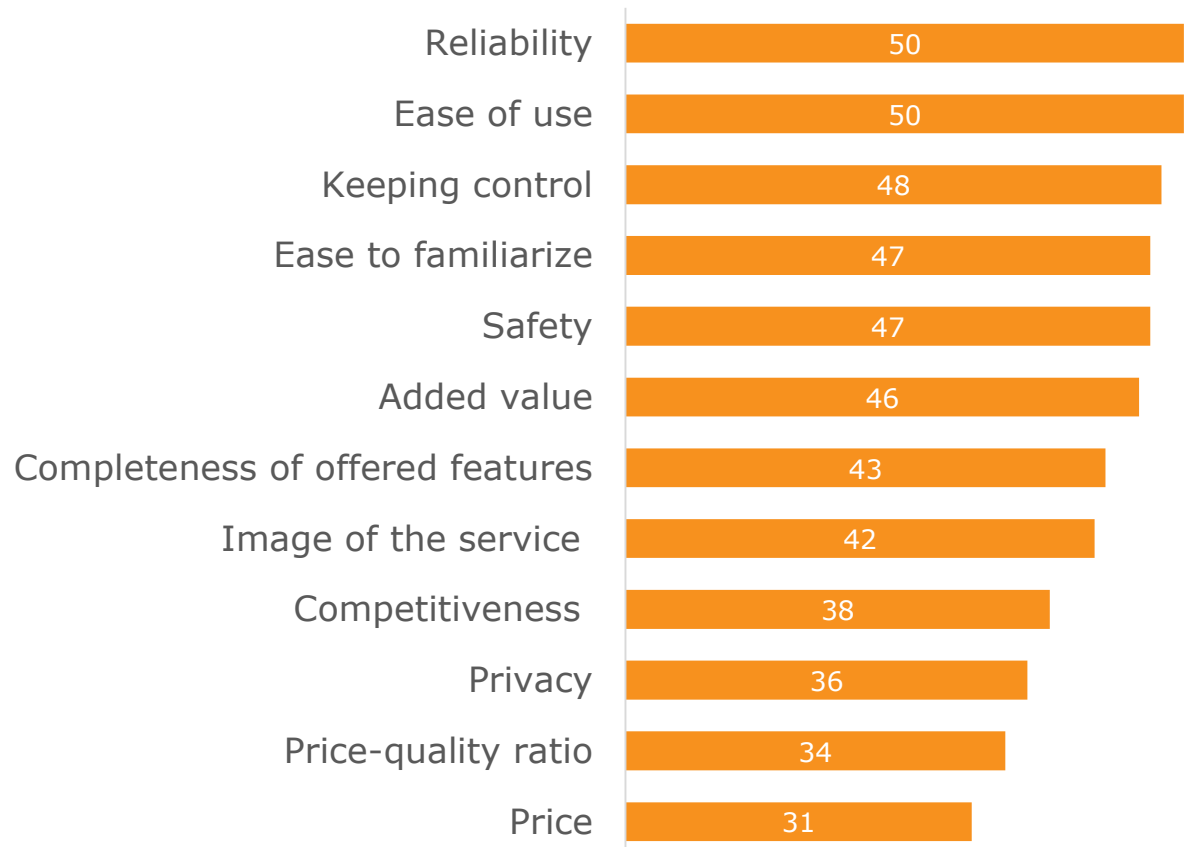
of connected features,
59,7% (n=2225)



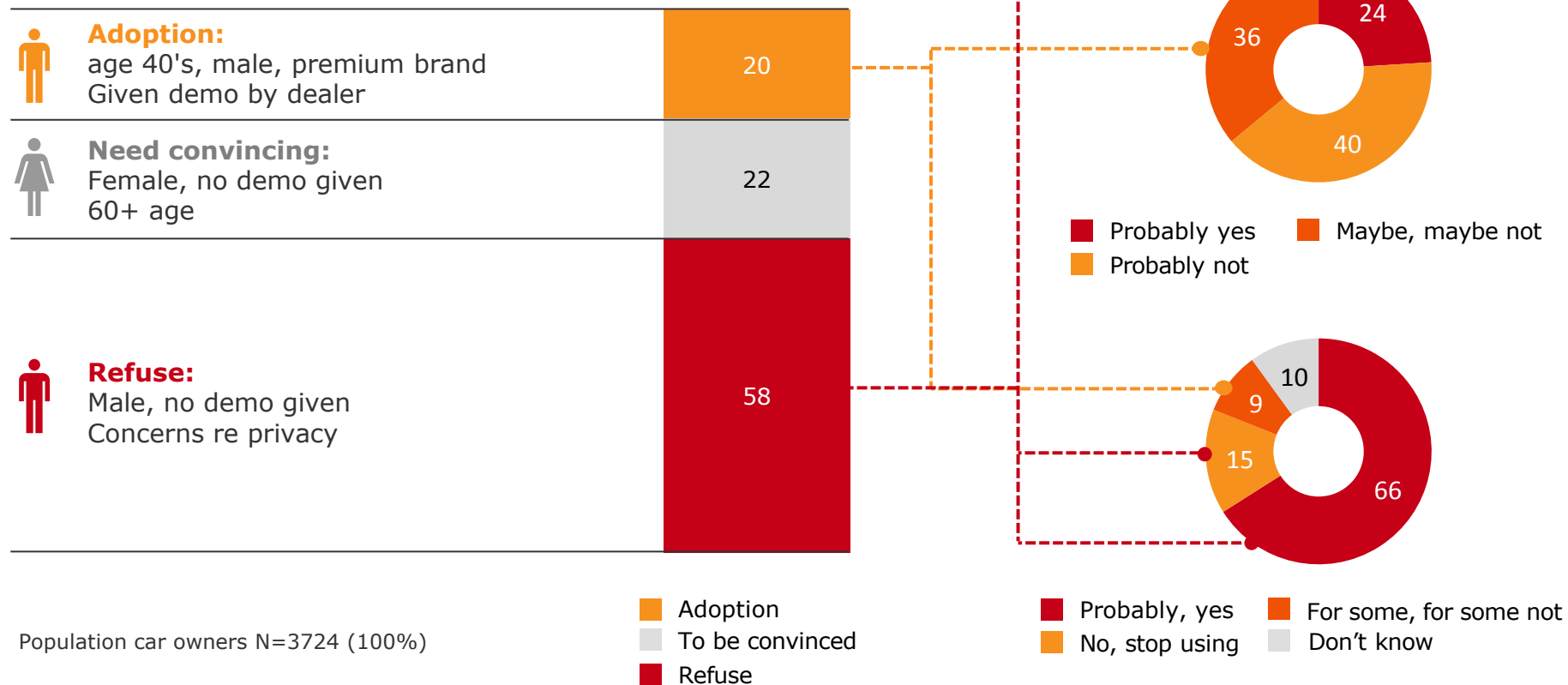
Non-users

of connected features,
40,3% (n=1499)

Q390, %
base: users



Current adoption levels and potential usage of connected features in the future



TNS recommendations



OEMs need to increase awareness and understanding of easy to use connected car features and drive excitement



Demos for all customers at test drive stage to showcase connected car features



Improved onboarding of dealership staff in connected car features (training, digital experts)



Measure customer experience and satisfaction with connected car features