



Future of Driving Report

ADOBE ANALYTICS SURVEY | OCT 2019

Based on responses from 1,000+ US consumers

Methodology



Between September 24-30, 2019, 1,040 U.S. adults aged 18+ completed a survey about connected car features and self-driving cars. All respondents were required to have a U.S. license and own a smartphone.

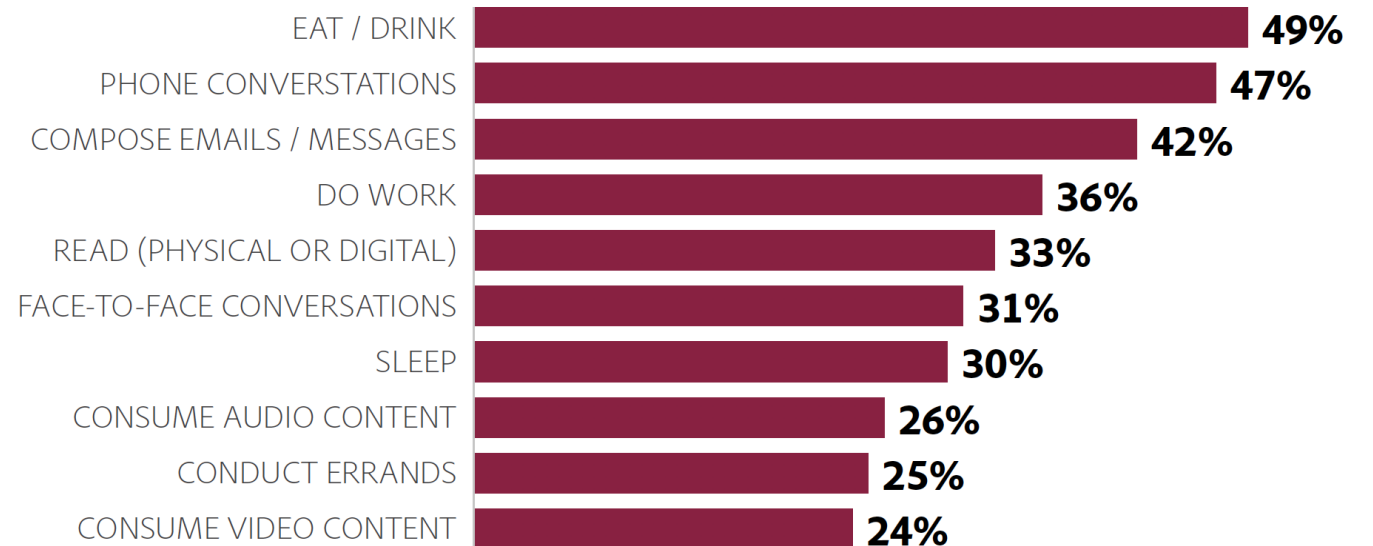
Adobe Analytics' "Future of Driving" report also analyzed **over 1 trillion visits to websites**, including many of the world's leading automotive sites, to better understand how consumers research car options on digital channels, for purchase.

Key Findings

- Drivers are ready to see more self-driving cars on the road and have plans to make these cars an extension of their homes and offices.
- Many drivers already factor whether a car has self-driving features into their buying decisions.
- Electric/hybrid drivers are interested in connected experiences in the car while gas-powered car drivers place an emphasis on value.
- Millennials are the most accepting of electric, hybrid and connected vehicles.
- Drivers are showing more interest in connected cars than ever before, with support growing by over 35% in the last year.
- The majority of drivers want more connected car features and support so they can be less reliant on smartphones while driving.
- Thanks to built-in voice assistants, drivers can now shop and socialize while in the car, things they'd otherwise handle outside the car.

Drivers Want to Make Self-Driving Cars an Extension of Their Homes and Offices

- 40% of drivers are in favor of self-driving cars being available for purchase
- Nearly half of drivers intend to snack, chat on the phone or catch up on email while the car drives itself
- Others want to enjoy more leisurely activities, like sleeping (30%), enjoying their favorite podcast (26%) or catching up on their favorite TV show (24%)



TOP ACTIVITIES OF INTEREST WHILE IN A SELF-DRIVING CAR (US, SEP 2019)
SOURCE: 2019 CONNECTED CAR SURVEY

Self-Driving Features are Already a Key Consideration When Making Buying Decisions

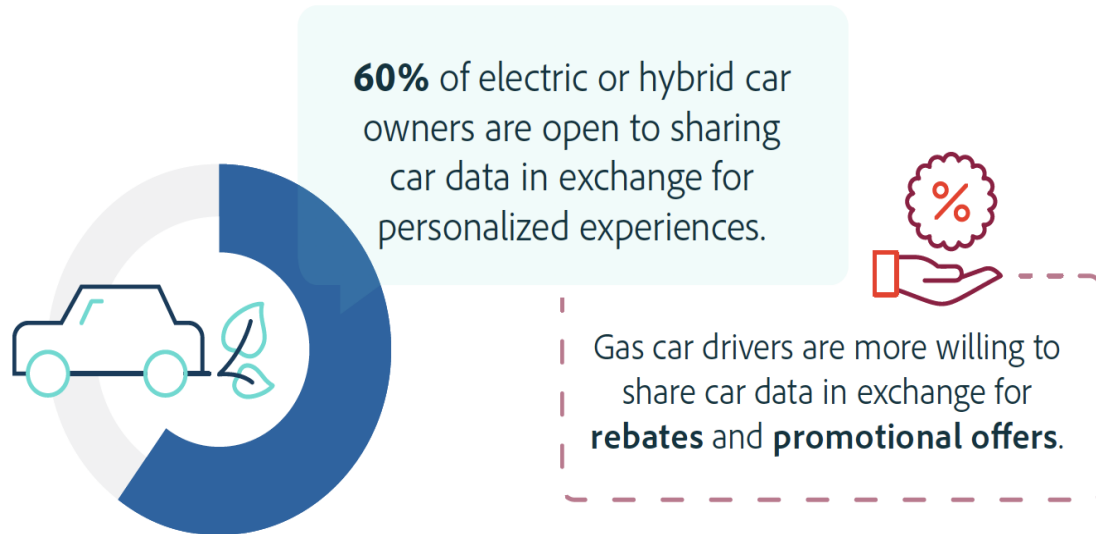
- 44% of drivers say having a car with self-driving features such as lane assist and parking assist is currently a factor in their car buying decision



Electric and Hybrid Drivers Value Connected Experiences in the Car

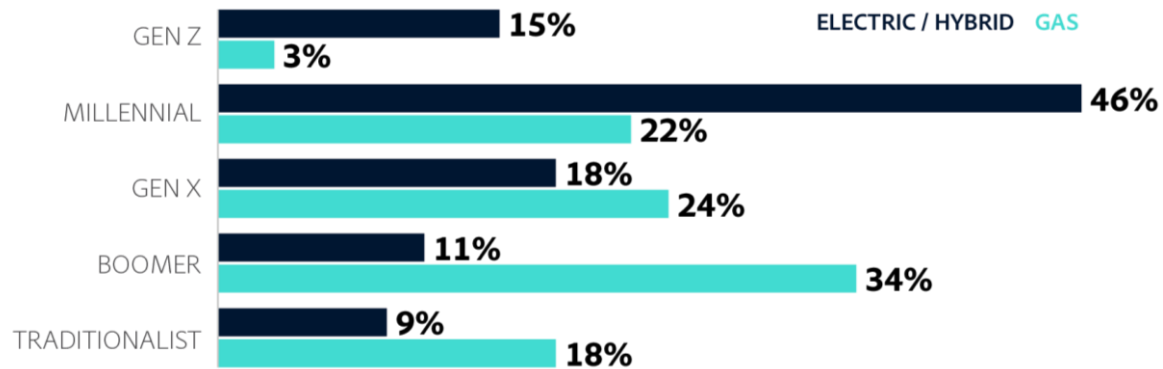
- Electric/hybrid car owners are more receptive to the idea of connected cars – they're 1.5 times more likely to use a built-in voice assistant daily
- 60% of electric/hybrid car owners are willing to share their car data in exchange for personalized experiences
- Electric/hybrid car drivers are also twice as likely to feel comfortable getting into a self-driving car vs. gas-powered car drivers
- Nearly half (46%) of electric car drivers would use their vehicles less frequently if there was better access to electric scooters, as opposed to just 15% of gas car drivers

Gas-Powered Car Drivers Emphasize Value



- Gas car drivers more willing to share their car data in exchange for rebates and promotional offers
- 60% of gas car drivers say they'd be more willing to purchase an electric car if charging stations were more readily available, batteries had a longer range and the cars were more affordable
- Of those, 1 in 3 say they are considering an electric or hybrid vehicle as their next purchase

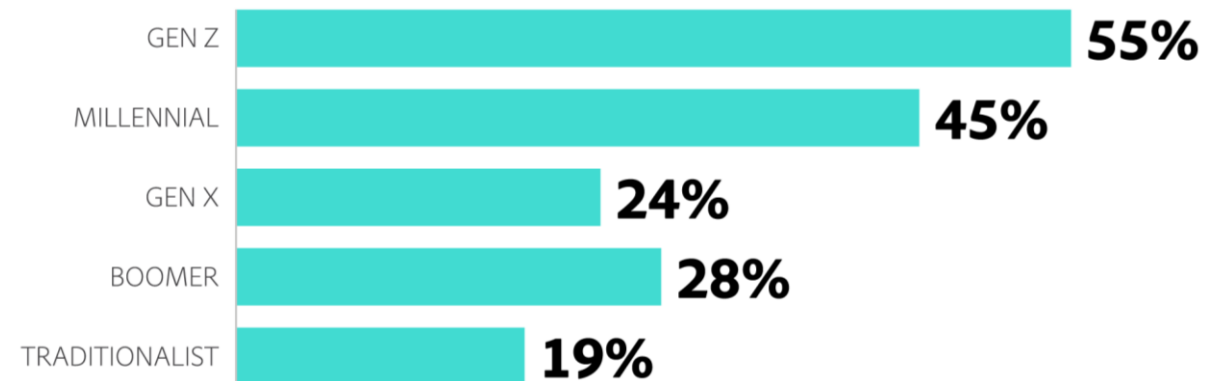
Millennials are the Most Accepting of Electric and Connected Vehicles



 AGE DISTRIBUTION OF GAS VS. ELECTRIC CAR OWNERS (US, 2019)
SOURCE: 2019 CONNECTED CAR SURVEY

- Millennials and Gen Z harbor the most positive attitudes toward self-driving and connected cars and features

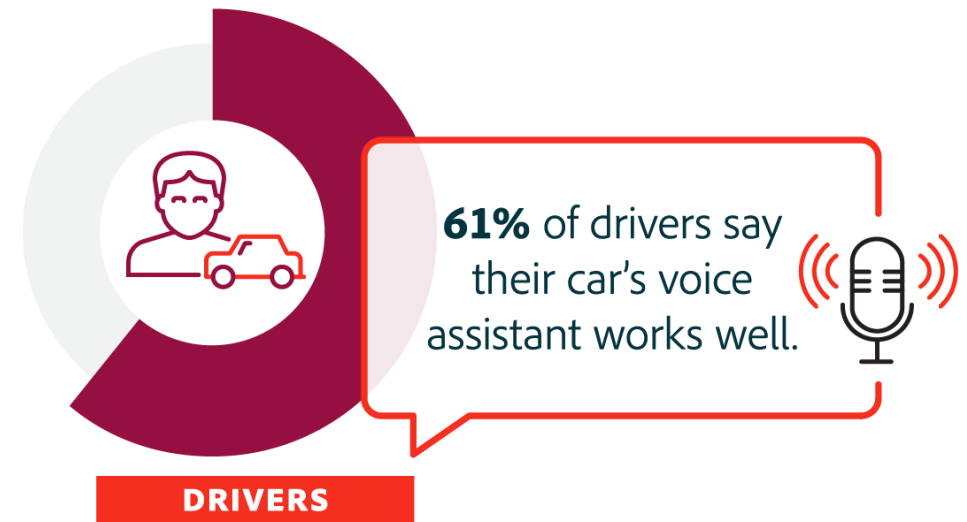
- Nearly half of electric/hybrid car owners are Millennials compared to gas car drivers who are evenly dispersed across age groups (with the exception of Gen Z)



 CAR VOICE ASSISTANT PREFERENCE BY AGE (US, SEP 2019)
SOURCE: 2019 CONNECTED CAR SURVEY

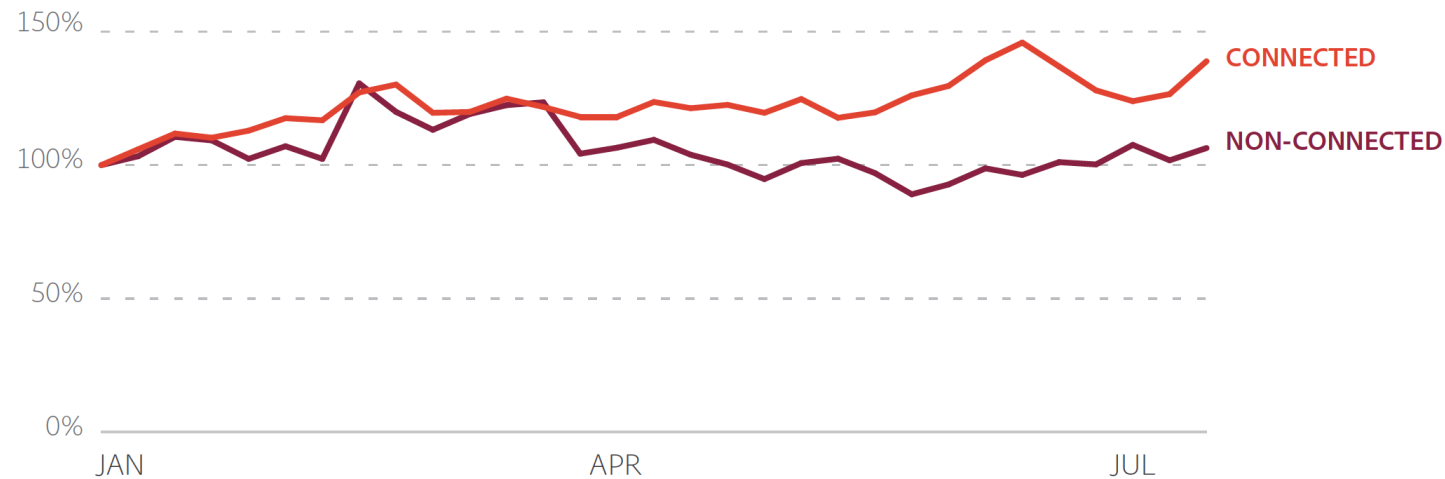
Drivers are Showing More Interest in Connected Cars and Voice Assistants than Ever Before

- 1 in 4 drivers say they're driving a car with some type of built-in voice control functionality, and 39% of drivers say they use their voice assistants daily
- 61% of drivers with connected car functionality confirmed their built-in voice assistants work well
- 1 in 3 drivers say a built-in voice assistant is a factor in their car buying decision



And They're Doing Their Research...

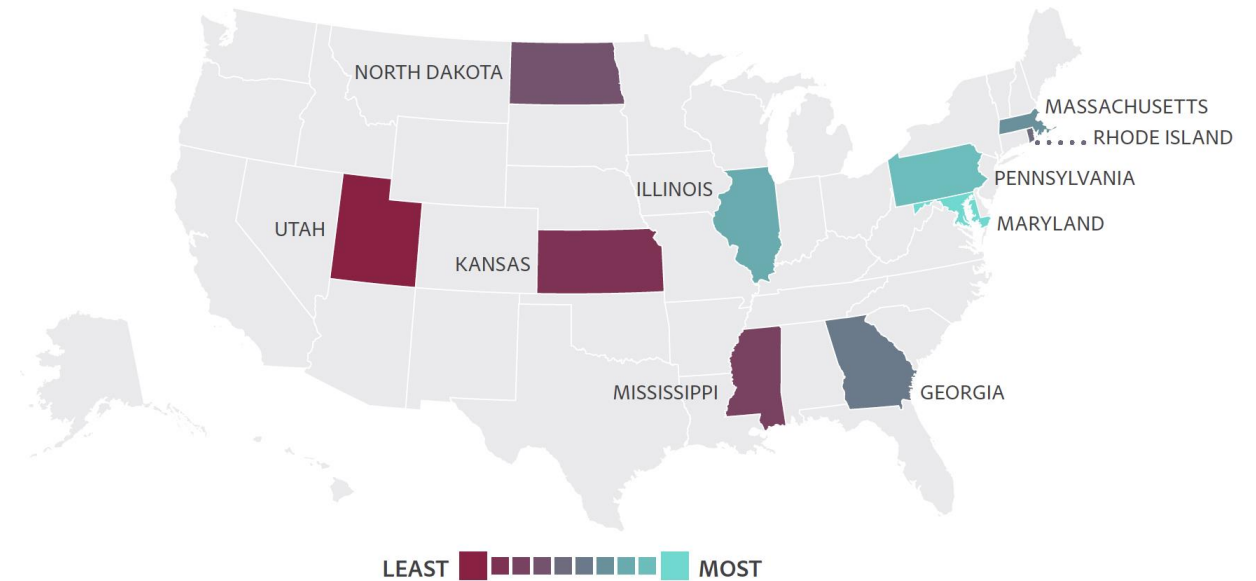
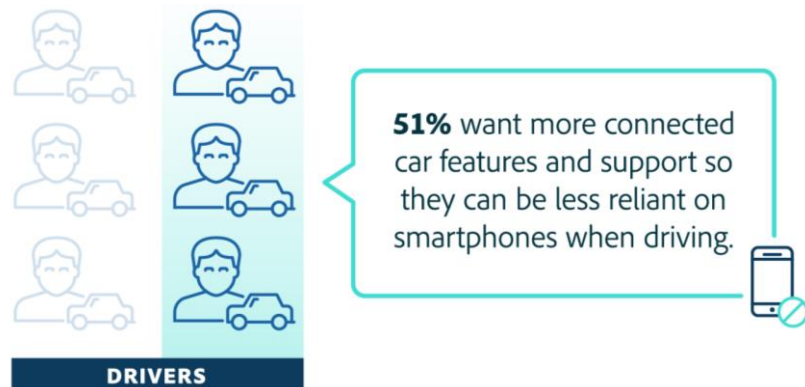
- Visits to pages containing connected car information on car manufacturer sites have increased 35% since January 2019 while non-connected car pages have only seen a 5% growth in the same time period
- Additionally, connected car pages are now contributing 12% more to overall car website traffic than in January 2019



VISIT GROWTH COMPARISON FOR CONNECTED VS. NON-CONNECTED CAR PAGES (US, 2019)
SOURCE: ADOBE ANALYTICS

Interest in Connected Cars is Higher in States with Stricter Distracted Driving Laws

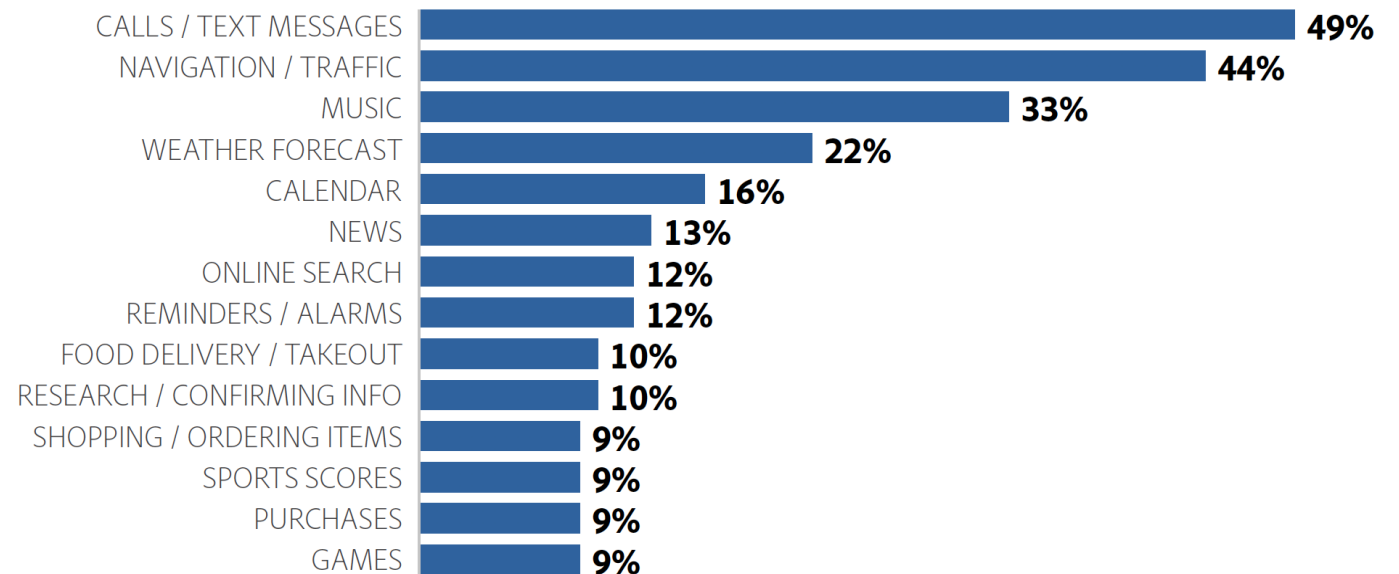
- Drivers in states with stricter distracted driving laws are showing more interest in connected car features
- The majority of drivers (51%) want more connected smart features and support in their cars so they can be less reliant on smartphones when behind the wheel



STATES WITH THE MOST & LEAST INTEREST IN CONNECTED CAR (US, 2019)
SOURCE: ADOBE ANALYTICS

Built-in Voice Assistants are Used for a Variety of Activities

- Of the 1 in 4 drivers with built-in voice control functionality, many are using their time in the car to complete tasks they would otherwise handle outside the car, such as texting (49%), shopping (9%) and searching sports scores (9%)
- This is in addition to using their voice assist for more typical in-car activities, such as navigating traffic (44%) and listening to music (33%)



TOP ACTIVITIES FOR BUILT-IN CAR VOICE ASSISTANT (US, SEP 2019)
SOURCE: 2019 CONNECTED CAR SURVEY



Adobe