

Future Interior Study 2020

January 2021

STUDY BACKGROUND	The Corona/Covid-19 pandemic is currently affecting the daily lives of almost the entire world population. Because of that, cleanliness and hygiene in everyday life have gained more prominent roles and are also affecting what products we buy. The focus of the present study was to find out the influence of the changing environment on the car purchase behavior in general and especially with regards to cleanliness and hygiene.
TOPICS	Car ownership and usage, attitudes towards car sharing, relevance of car features for current and next car, attitudes towards cleanliness in the car, evaluation of new hygiene/ cleanliness functions, pricing of two new feature packages, wishes for controlling car's functions, wishes for future cars with regards to Covid-19 prevention
METHOD	Online survey via online access panel
MARKETS	Germany, USA, China, Japan
TARGET GROUP	Car drivers and decision makers for car purchase n=2,000 (n=500 per market)
FIELD WORK	12/08/2020-12/15/2020

*This document is excerpted from the original document. Please ask us for the whole of the survey result.

Management Summary

Car ownership & usage:

In all four markets around 70% have a car to themselves. In Germany and China those cars are mainly from German brands, whereas in the US and Japan, Toyota is the number one brand.

Compared to the other countries, in Germany second-hand cars play an important role. Most current cars are second-hand cars and Germans are very open to their next car being second-hand. In China and Japan (and to some extent the US) new cars have been the most prominent choice for the current car and will be the number one choice for the next one.

Even though electric cars become more popular globally and many car manufacturers switch to an all-electric strategy in the next decade(s), costumers, especially in Germany, the US, and Japan will most likely buy a combustion engine car next. At least to some extent, plug-in hybrids are considered.

In China however, more and more consumers are planning to rather buy an electric car or even one with a fuel cell, next.

Brand loyalty is quite high in all countries. However, about half of the car drivers have not decided, yet, so they might consider buying a different brand next. Only between 8% and 15% will not buy the same brand as they currently own.

Car sharing/rental and ridehailing are still niche services in Germany, the US and Japan. Only in China, a considerable amount of people uses it today. The vast majority in Germany, the US and Japan did not use those services within the last year. However, the Covid-19 pandemic might have had an effect, as people did not travel as much as they would have in a “normal” year and some might have chosen other means of transport due to anticipated health risks.

For future usage of car sharing and rental, the country-specific differences are the same, even though many people who are not using it today are at least open to it.

Management Summary

Car purchase and interest in new car features:

Fuel consumption and running costs have been the most important reasons car drivers chose their last car and are even more important today. In the US and China driving performance stays one of the most important factors for the decision. Connectivity features, interior design and assistance system are becoming more and more important, but are still less relevant to the purchase decision than other aspects of the car. Especially connectivity or rather the lack of it is something that annoys many car drivers. Furthermore, bad usability and too much noise while driving are issues they report.

In the context of usability, most car drivers would like to control their car's functions with a touchscreen or voice control. Gesture control is quite disliked on the other hand.

Sustainability is a rather difficult topic for car drivers. On the one hand, the topic is quite important to them, but on the other, willingness to cut back on car size or pay more for a sustainable car is rather low, except for in China. The main action car drivers want to take is to compare fuel efficiency of the cars they consider next.

Management Summary

Cleanliness and Hygiene:

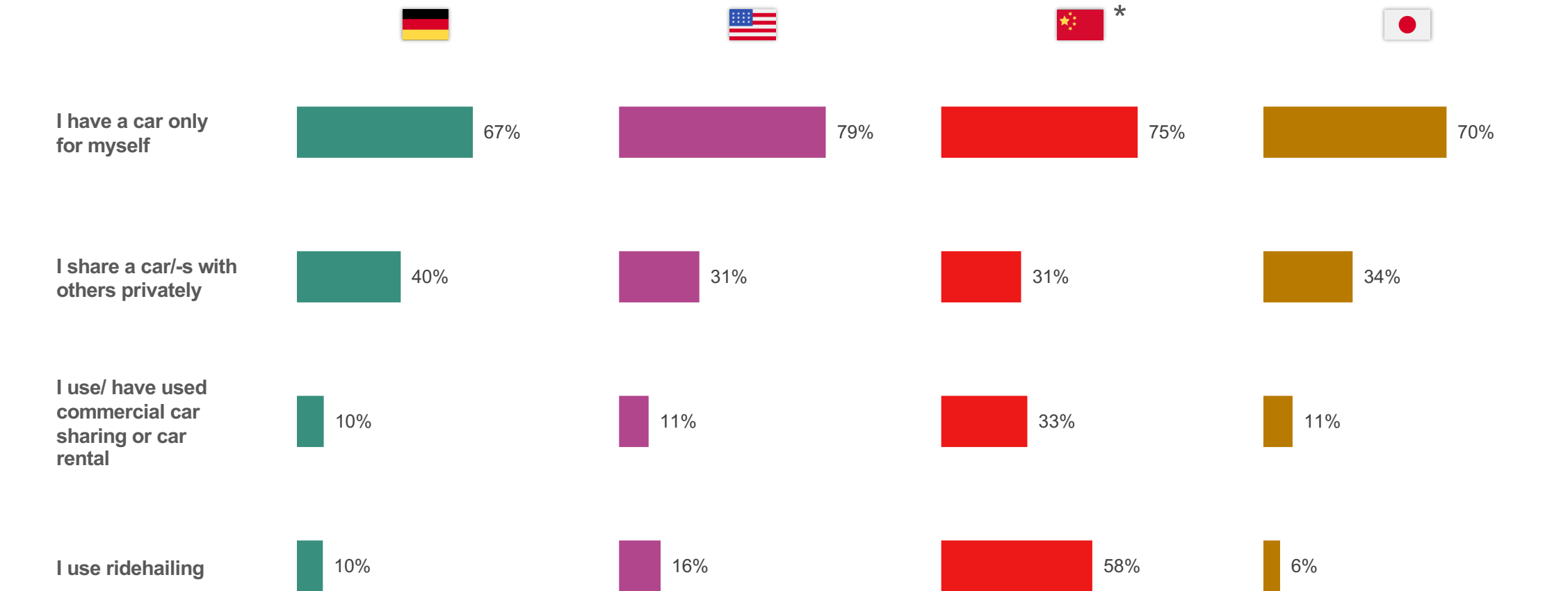
Cleanliness of the car is very important to customers in the four markets. Not just for cars shared with others but also for the ones they drive themselves. Main complaints are garbage lying around, unpleasant odors and crumbs/dirt in hard to reach places. In Japan, people also complain about their cars being especially dirty on the outside.

New features that deal with cleanliness and hygiene within the car are quite welcome by the car drivers. They mainly wish for features that make the interior easier to clean or less likely to get dirty in the first place. In addition, they wish for an air filtration system cleaning the air within and outside the car. Reasons for that could be the ongoing Covid-19 pandemic, but we also know from past studies, that people are more and more concerned about health risks due to air pollution in inner cities.

Both presented feature packages are very well received with the car drivers, especially in China. The Surface Protect package is rated somewhat higher, though. Accordingly, willingness to pay is also highest in China compared to the other three markets.

In all countries the majority has a car for themselves. China has the highest share of people having used car sharing/rental or ridehailing.

Car usage/ownership

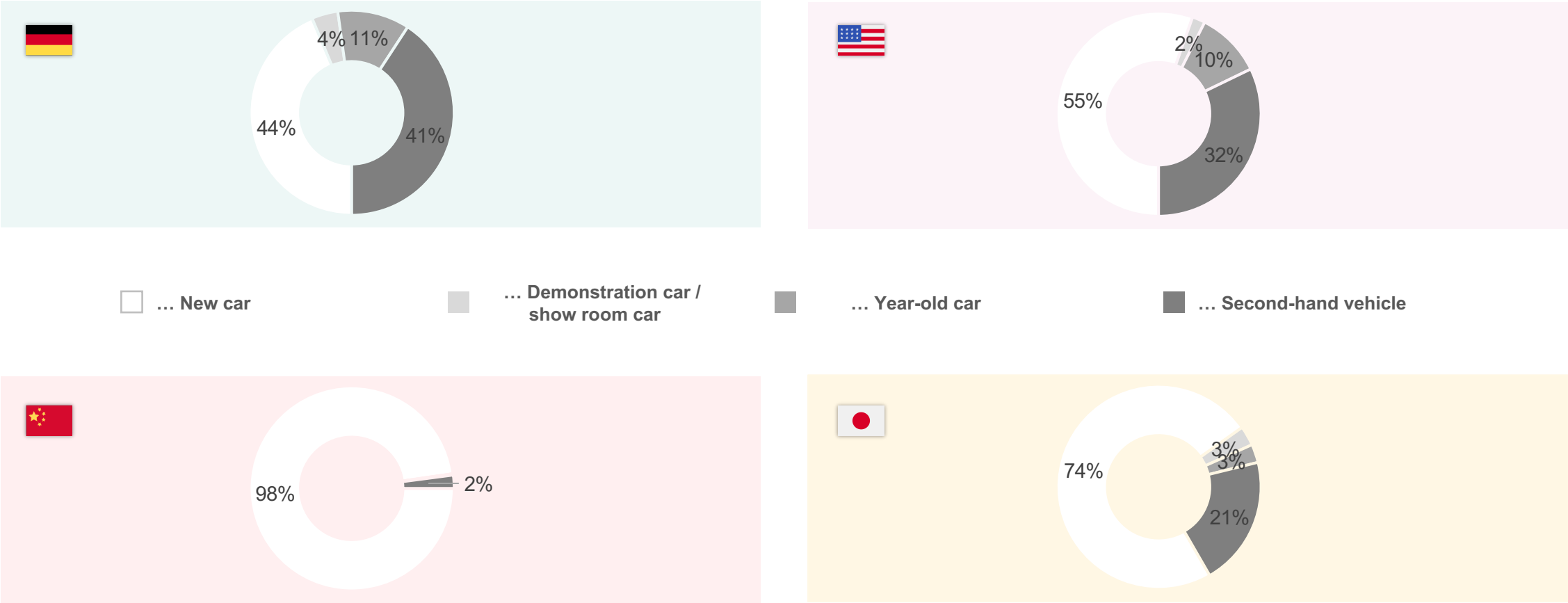


* For Chinese customers, often times there is no clear distinction between modern Ridehailing and classic taxi services.

All: A.4. Which of the following options apply to you? | Multiple Choice | Base: n_{DE}=500. n_{US}=500. n_{CN}=500. n_{JP}=500

In DE second-hand cars are as popular as new cars. In the US a slight majority are new cars, whereas in CN almost all cars were bought as new.

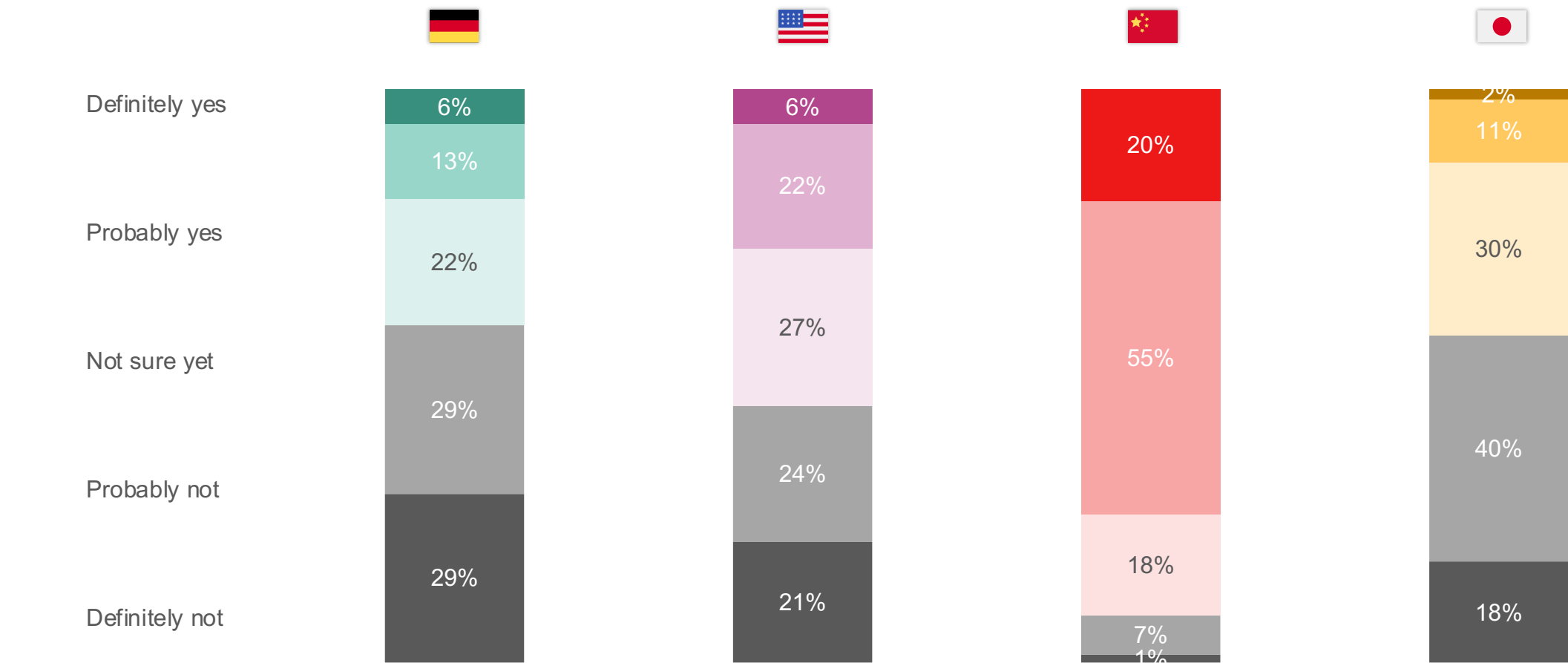
Condition of car at purchase



Filter: A.4. Private car: A.7. Was this car at the time of purchase a... | Single Choice | Base: n_{DE}=480. n_{US}=488. n_{CN}=479. n_{JP}=484

Car sharing/rental in the future are most preferred in China. About 40% of the car users in Japan and Germany are open to it.

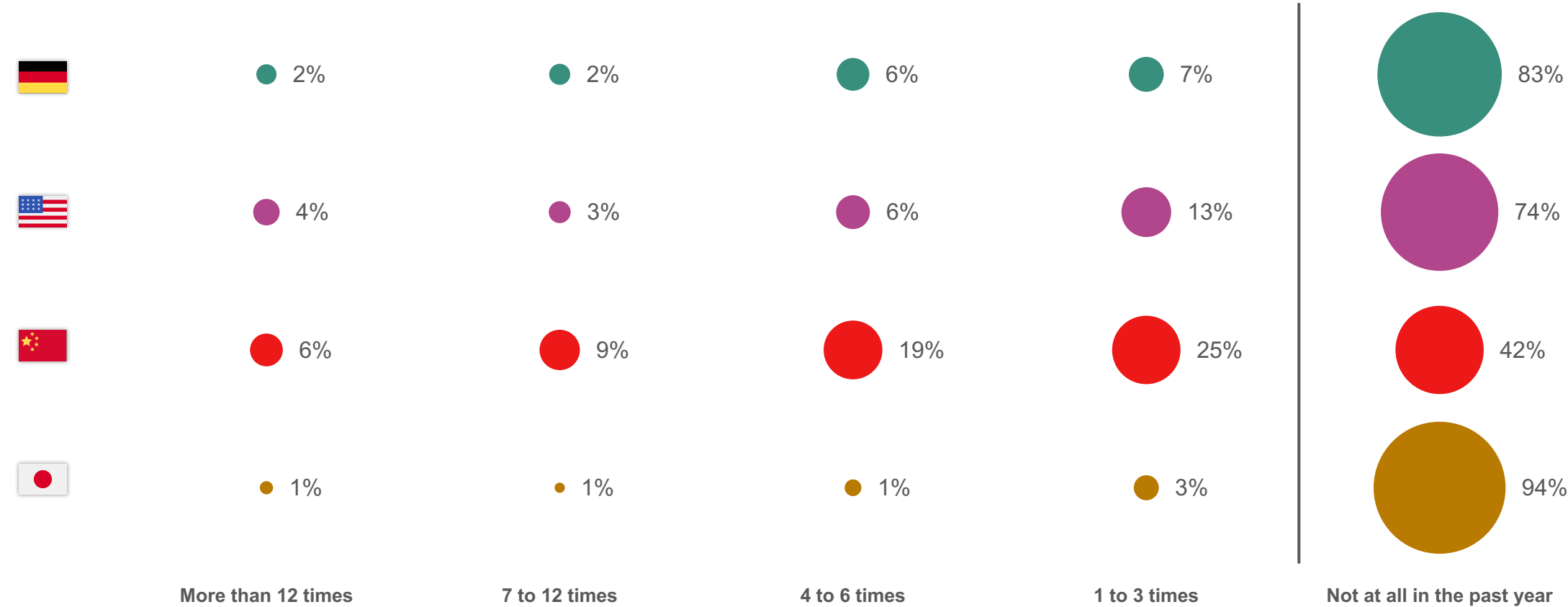
Commercial car sharing or car rental in the future



All: A.12. Can you imagine using commercial car sharing or car rental in the near future? | Single Choice | Base: n_{DE}=500. n_{US}=500. n_{CN}=500. n_{JP}=500

Most people didn't use car sharing in the past year (to some extent probably due to Covid-19). CN has the highest share of car sharing users.

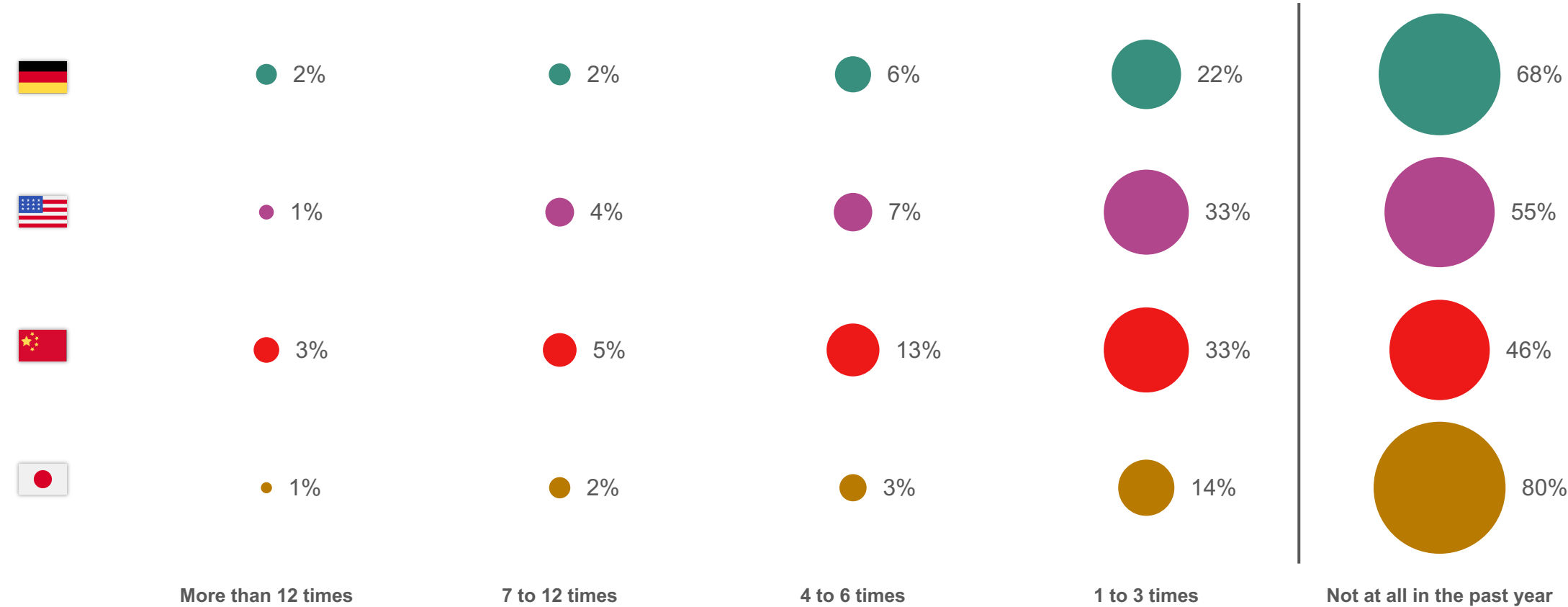
Used commercial car sharing in the past year



All: A.13. In the past year, how many times have you ... | Matrix | Scale: Scale: More than 12 times; 7 to 12 times; 4 to 6 times; 1 to 3 times; Not at all in the past year | Base: n_{DE}=500. n_{US}=500. n_{CN}=500. n_{JP}=500

The use of car rental is similar in all countries. China, again, has the highest share of users, whereas Japan has the lowest.

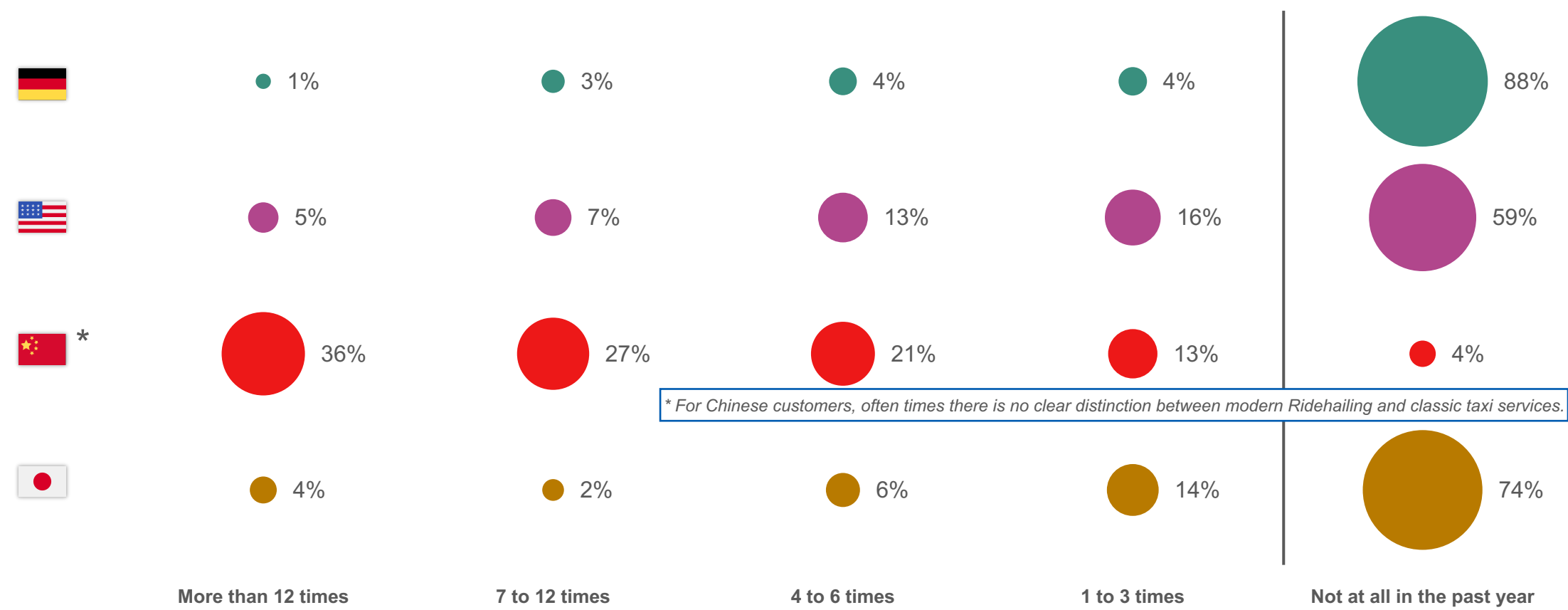
Rented a car in the past year



All: A.13. In the past year, how many times have you ... | Matrix | Scale: Scale: More than 12 times; 7 to 12 times; 4 to 6 times; 1 to 3 times; Not at all in the past year | Base: n_{DE}=500. n_{US}=500. n_{CN}=500. n_{JP}=500

Ridehailing is least prominent in DE and JP, and somewhat prominent in the US. In CN, taxi services are usually subsumed under ridehailing.

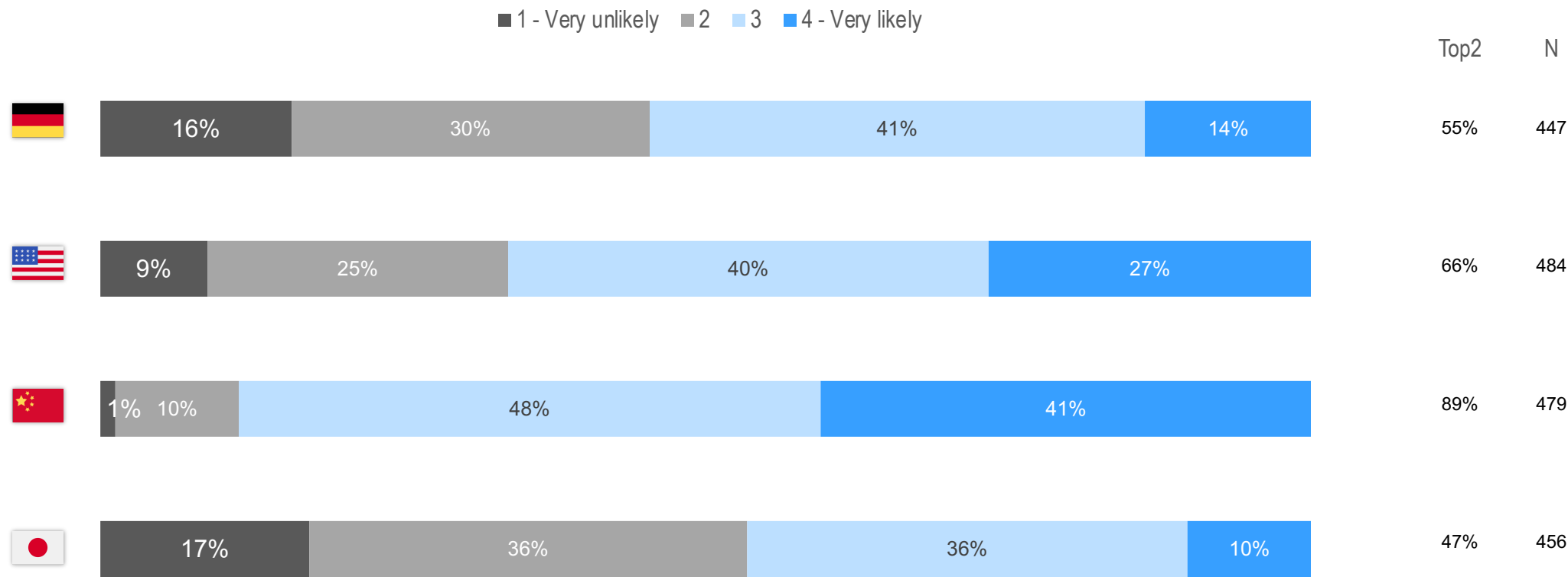
Used ridehailing services in the past year



All: A.13. In the past year, how many times have you ... | Matrix | Scale: Scale: More than 12 times; 7 to 12 times; 4 to 6 times; 1 to 3 times; Not at all in the past year | Base: n_{DE}=500. n_{US}=500. n_{CN}=500. n_{JP}=500

Cabin Protect package are most popular in US and CN. In DE and JP about half are interested.

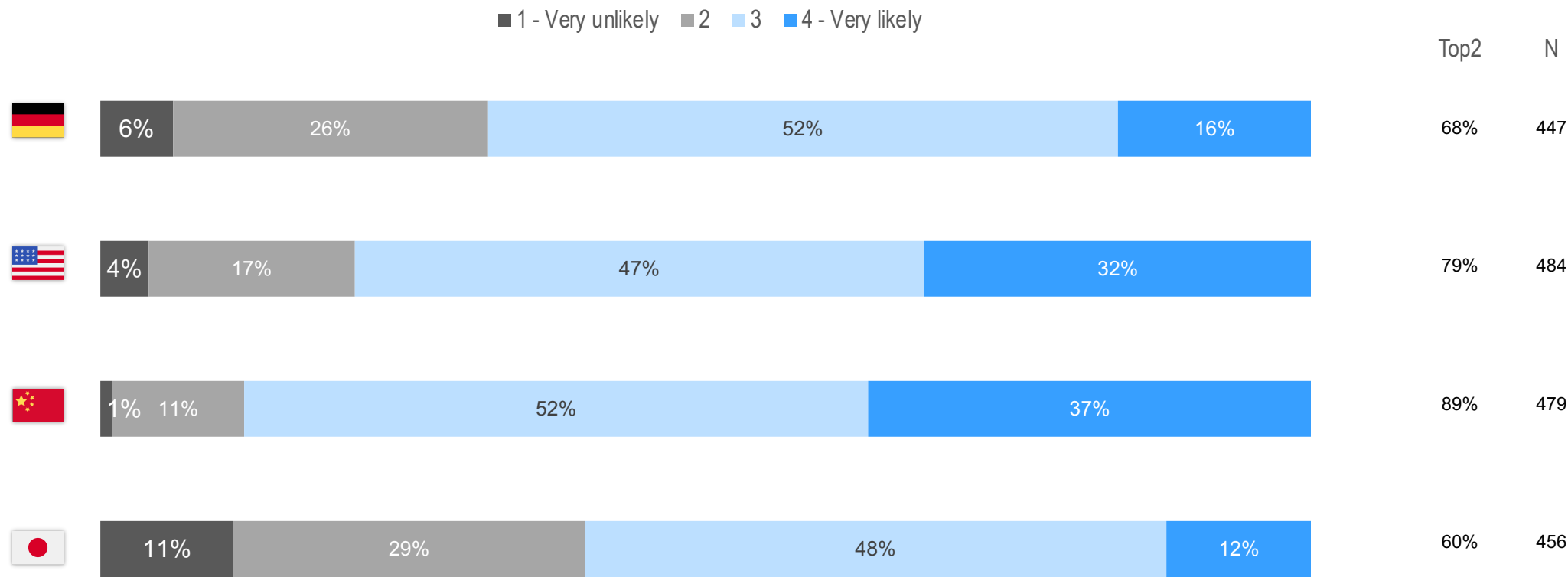
General Interest in Cabin Protect



Filter: A.9. Future car purchase intended: D.2. [...] How likely is it that you would purchase Cabin Protect in your next car for a reasonable price? | Single Choice | Scale from 1 "Very unlikely" to 4 "Very Likely" | Base: n_{DE}=447. n_{US}=484. n_{CN}=479. n_{JP}=456

In all countries, interest in the Surface Protect package is higher than the Cabin Protect package.

General Interest in Surface Protect

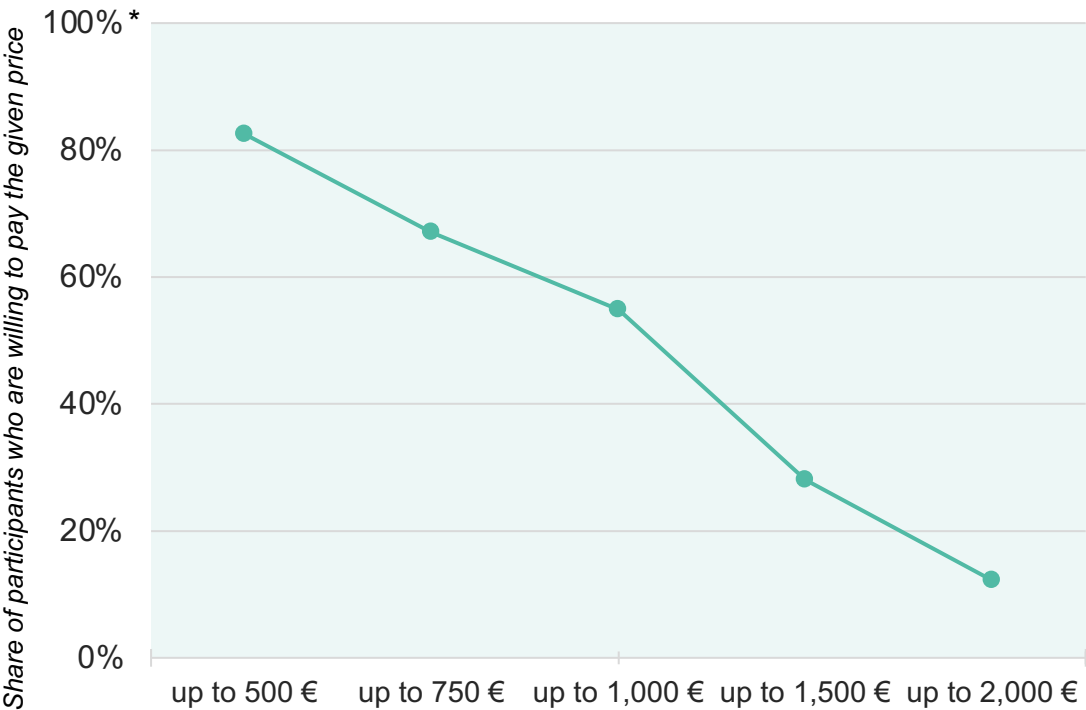


Filter: A.9. Future car purchase intended: D.8. [...] How likely is it that you would purchase Surface Protect in your next car for a reasonable price? | Single Choice | Scale from 1 "Very unlikely" to 4 "Very Likely" | Base: n_{DE}=447. n_{US}=484. n_{CN}=479. n_{JP}=456

Price analysis using the Gabor-Granger method.

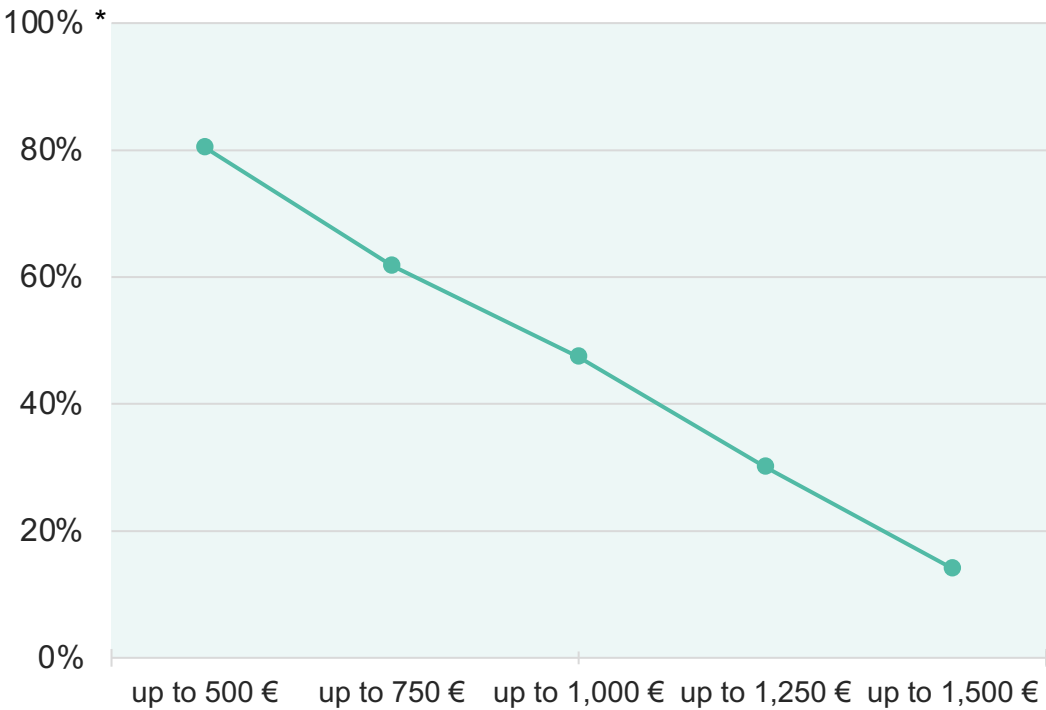


Purchase Intention Cabin Protect



Price Points

Purchase Intention Surface Protect



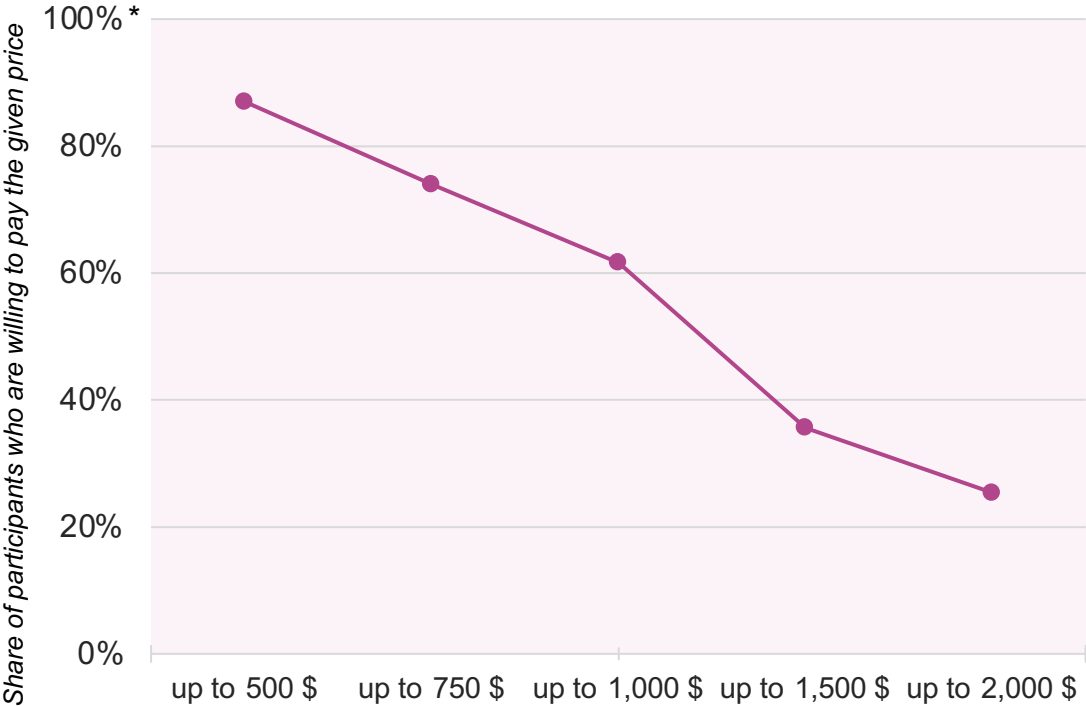
* Difference to 100%: no price acceptable

Filter: A.9. Future car purchase intended: D.3. – D.7. How likely is it that you would purchase Cabin Protect in your next car for (€ 500, € 750, € 1,000 € 1,500 € 2,500)? | Single Choice | Scale from 1 “Very unlikely” to 4 “Very Likely” | Base: n_{DE}=245 | D.9. – D.13. How likely is it that you would purchase Surface Protect in your next car for (€ 500, € 750, € 1,000 € 1,250 € 1,500)? | Single Choice | Scale from 1 “Very unlikely” to 4 “Very Likely” | Base: n_{DE}=304

Price analysis using the Gabor-Granger method.

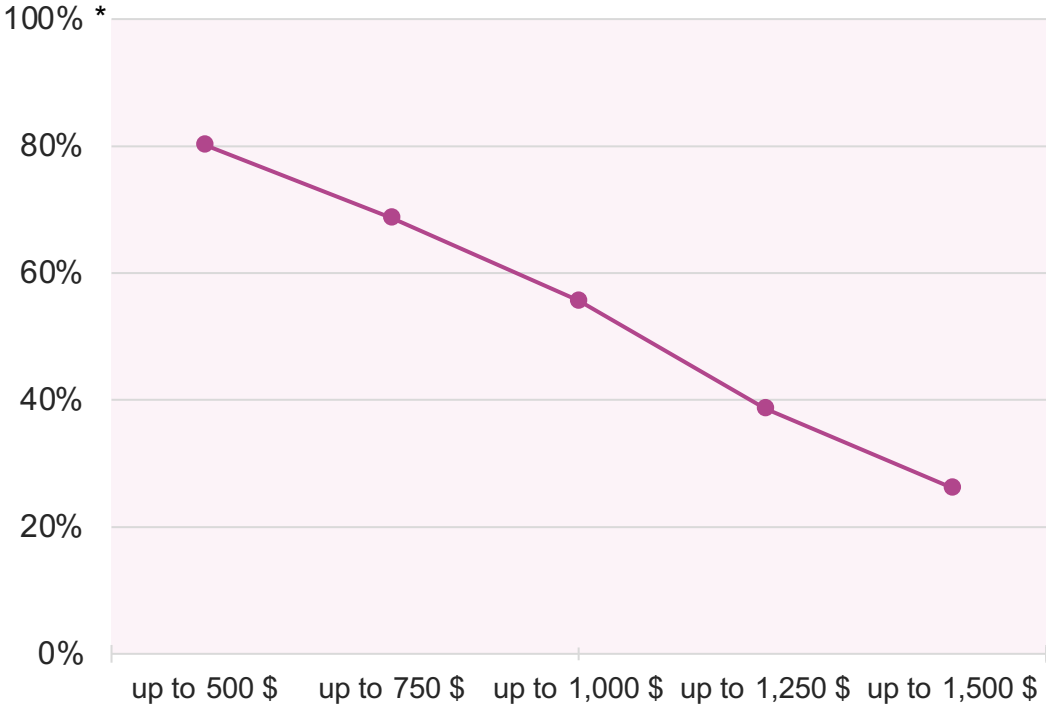


Purchase Intention Cabin Protect



Price Points

Purchase Intention Surface Protect



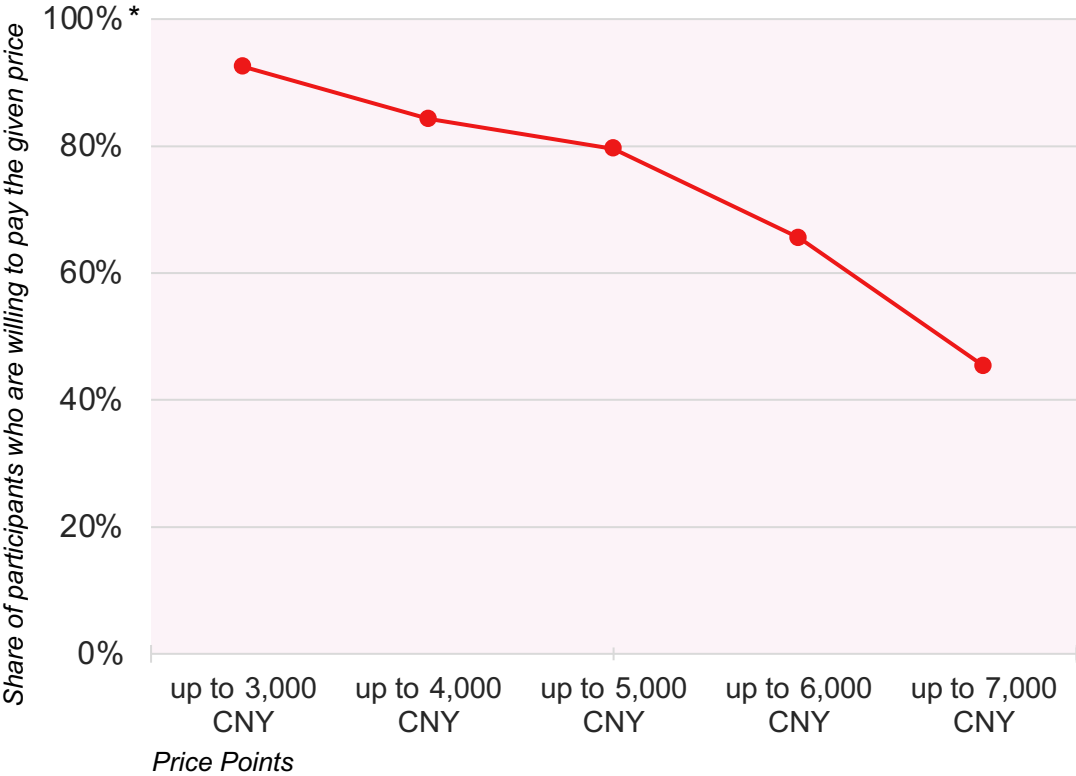
* Difference to 100%: no price acceptable

Filter: A.9. Future car purchase intended: D.3. – D.7. How likely is it that you would purchase Cabin Protect in your next car for (\$ 500, \$ 750, \$ 1,000 \$ 1,500 \$ 2,500)? | Single Choice | Scale from 1 “Very unlikely” to 4 “Very Likely” | Base: n_{US}=321 | D.9. – D.13. How likely is it that you would purchase Surface Protect in your next car for (\$ 500, \$ 750, \$ 1,000 \$ 1,250 \$ 1,500)? | Single Choice | Scale from 1 “Very unlikely” to 4 “Very Likely” | Base: n_{US}=381

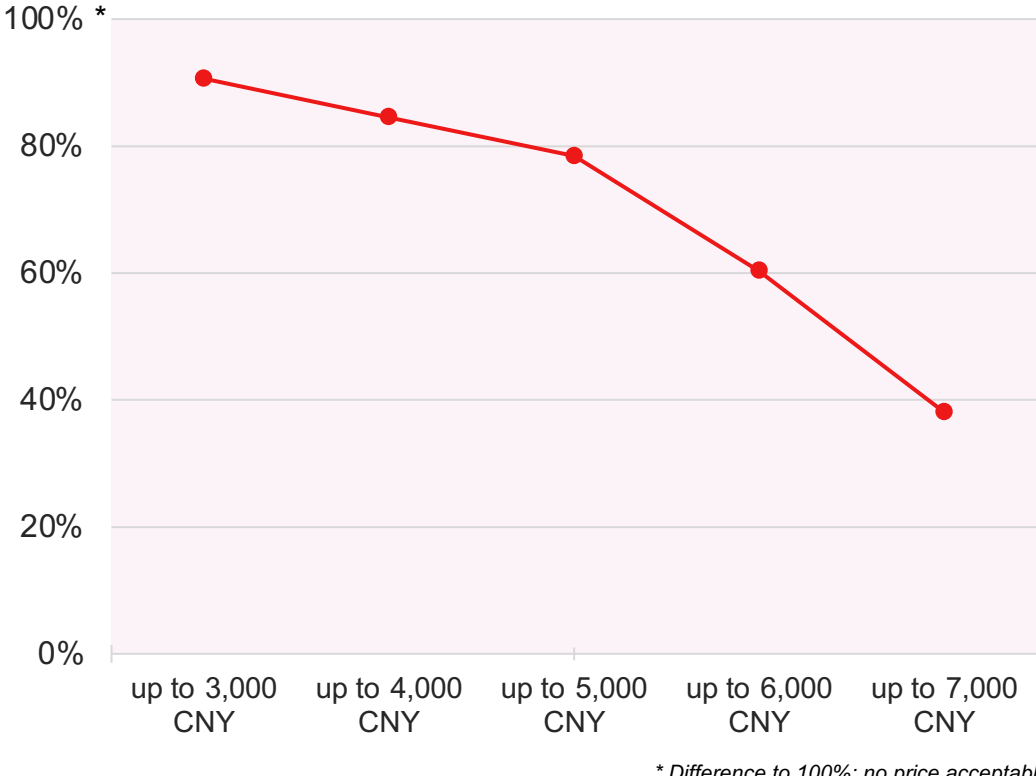
Price analysis using the Gabor-Granger method.



Purchase Intention Cabin Protect



Purchase Intention Surface Protect



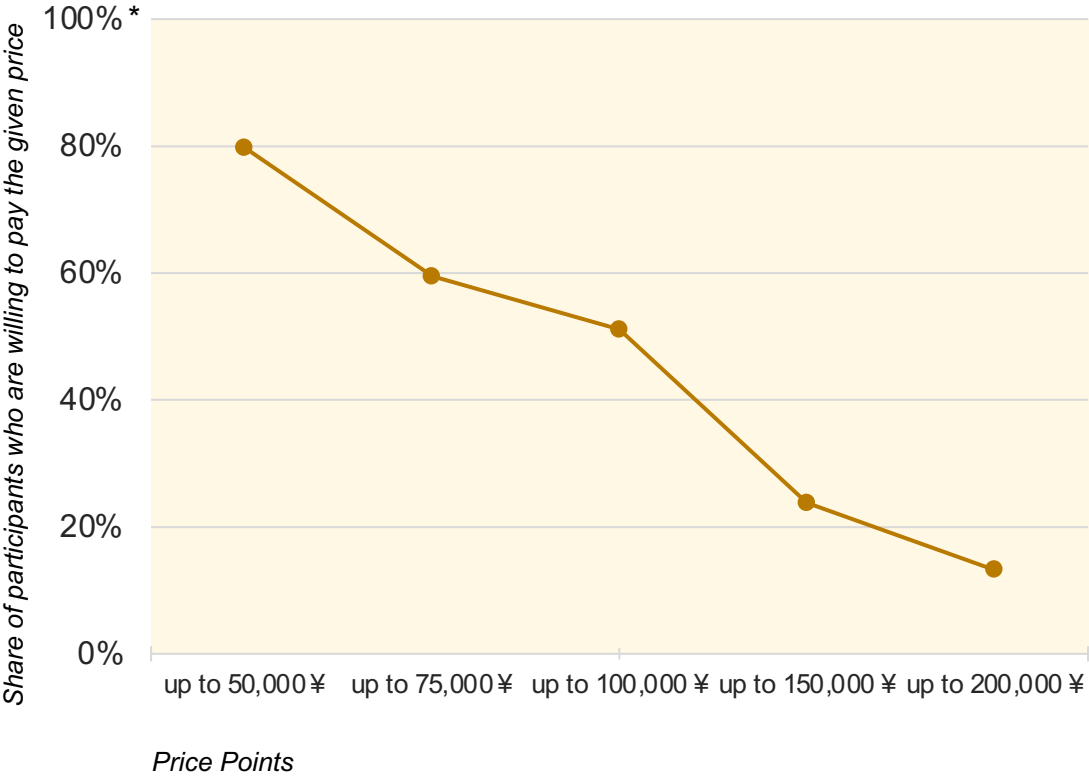
* Difference to 100%: no price acceptable

Filter: A.9. Future car purchase intended: D.3. – D.7. How likely is it that you would purchase Cabin Protect in your next car for (¥ 500, ¥ 750, ¥ 1,000 ¥ 1,500 ¥ 2,500)? | Single Choice | Scale from 1 “Very unlikely” to 4 “Very Likely” | Base: n_{CN}=424 | D.9. – D.13. How likely is it that you would purchase Surface Protect in your next car for (¥ 500, ¥ 750, ¥ 1,000 ¥ 1,250 ¥ 1,500)? | Single Choice | Scale from 1 “Very unlikely” to 4 “Very Likely” | Base: n_{CN}=424

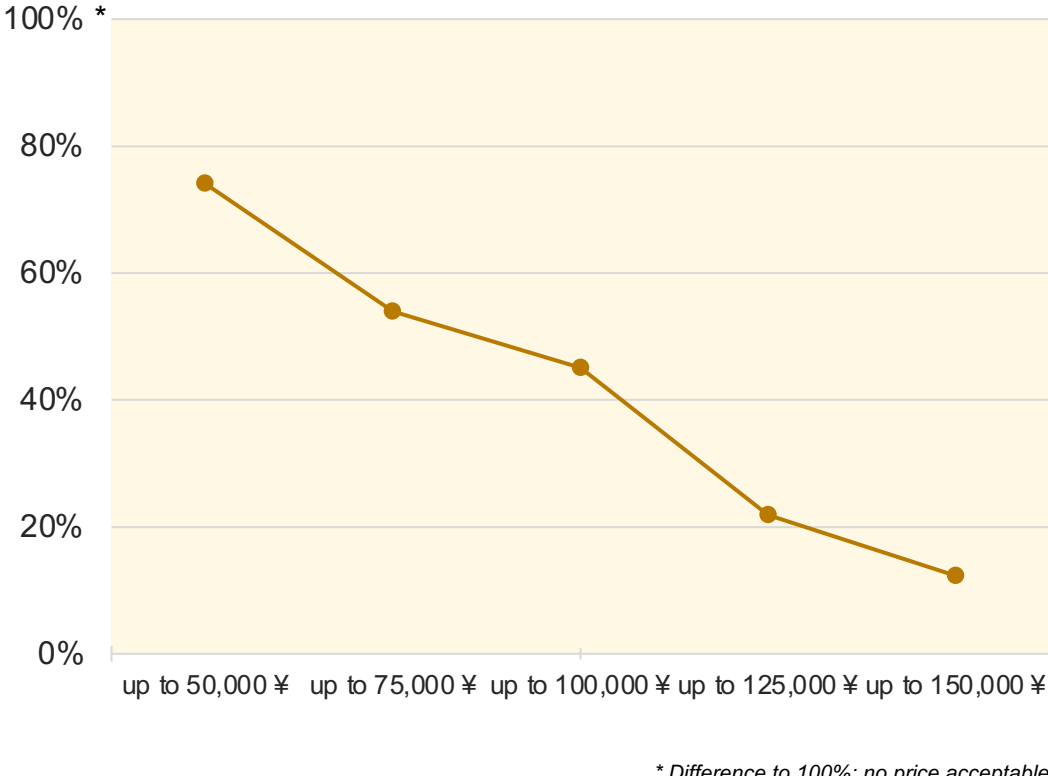
Price analysis using the Gabor-Granger method.



Purchase Intention Cabin Protect



Purchase Intention Surface Protect

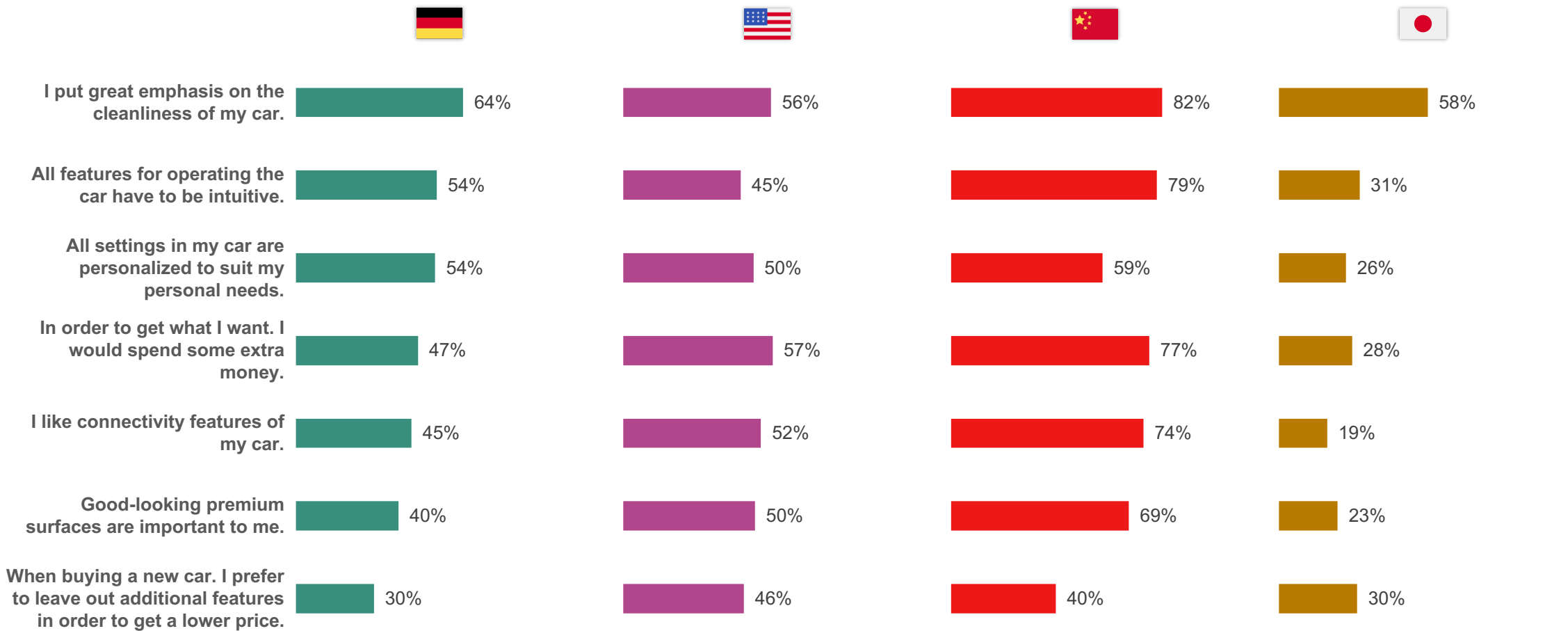


* Difference to 100%: no price acceptable

Filter: A.9. Future car purchase intended: D.3. – D.7. How likely is it that you would purchase Cabin Protect in your next car for (¥ 500, ¥ 750, ¥ 1,000 ¥ 1,500 ¥ 2,500)? | Single Choice | Scale from 1 “Very unlikely” to 4 “Very Likely” | Base: n_{JP}=213 | D.9. – D.13. How likely is it that you would purchase Surface Protect in your next car for (¥ 500, ¥ 750, ¥ 1,000 ¥ 1,250 ¥ 1,500)? | Single Choice | Scale from 1 “Very unlikely” to 4 “Very Likely” | Base: n_{JP}=274

Cleanliness of the car is very important in all countries, especially in CN.
In addition, connectivity and high usability are also important in CN.

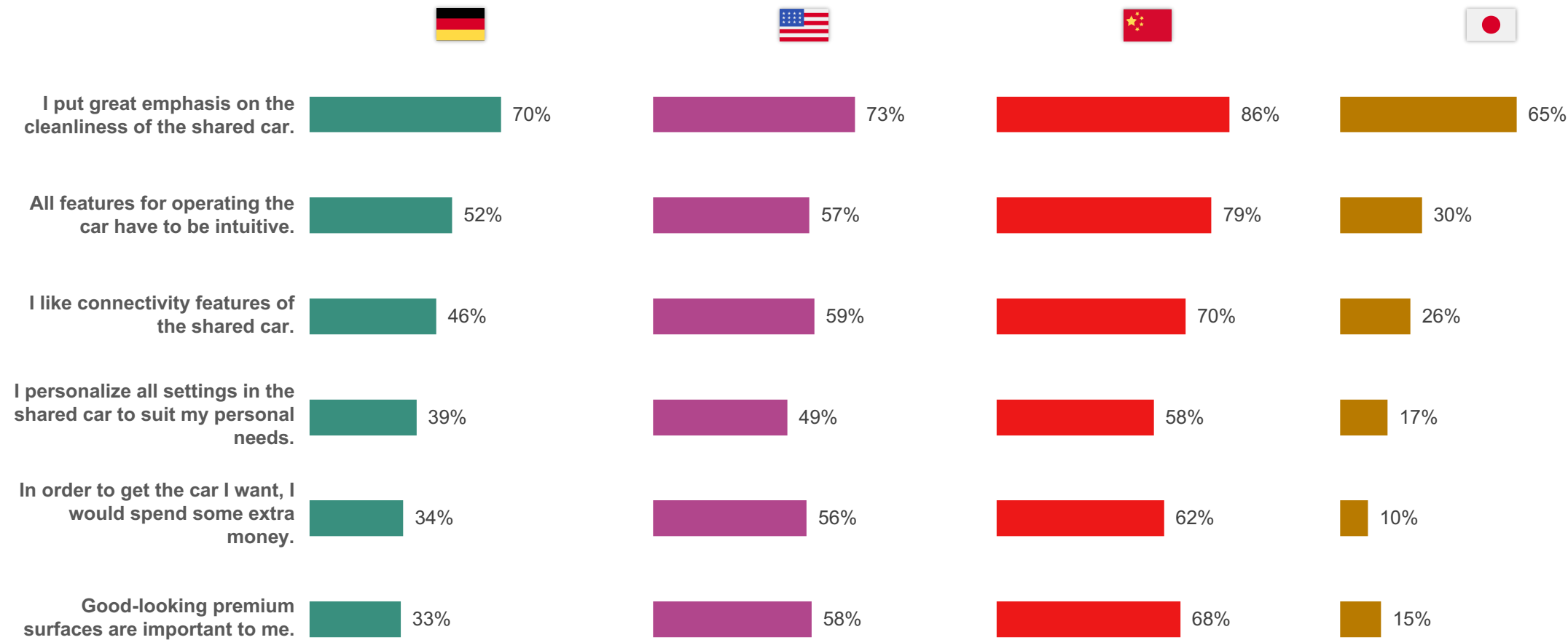
Statements about the current car (Top2)



Filter: Car used: C.1. Please indicate to what extent you agree with the following statements regarding the car you are using the most. | Matrix | Scale 1 "Do not agree at all" to 5 "Totally agree" | Base: n_{DE}=482. n_{US}=491. n_{CN}=480. n_{JP}=487

In car sharing cars, cleanliness is even more important than it is for privately used cars.

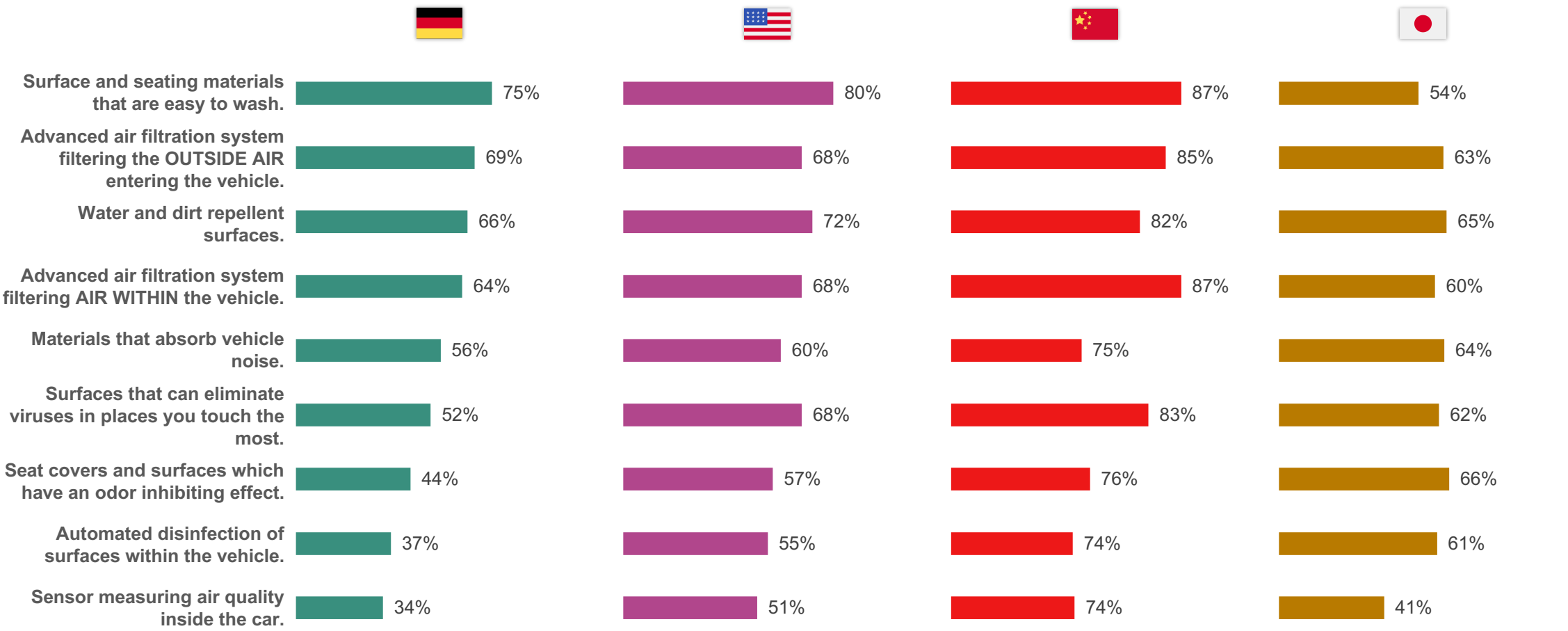
Statements about car sharing cars (Top2)



Filter: A.4. Carsharing user or A.12. User of car sharing in the future or A.13. Has used car sharing in the past year: C.2. Please indicate to what extent you agree with the following statements regarding a car sharing car. | Matrix | Scale 1 "Do not agree at all" to 5 "Totally agree" | Base: n_{DE}=206. n_{US}=283. n_{CN}=416. n_{JP}=155

Easy to wash surfaces are favored in DE, US and CN. In CN air filtration plays an important role. In JP almost all features are rated equally well.

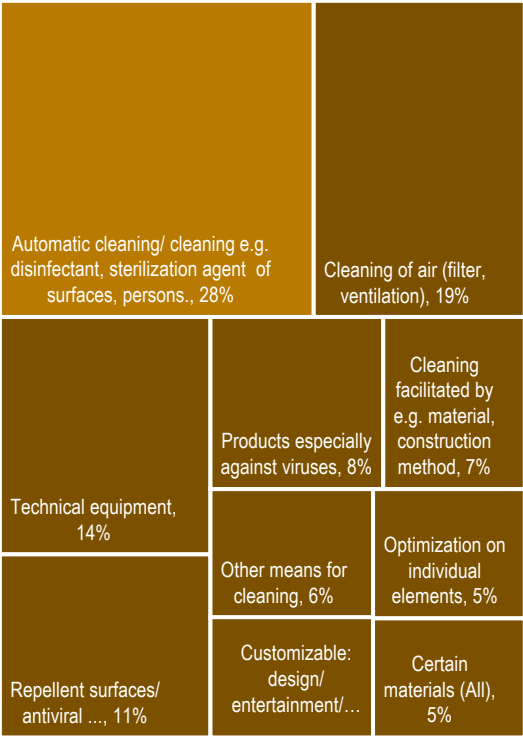
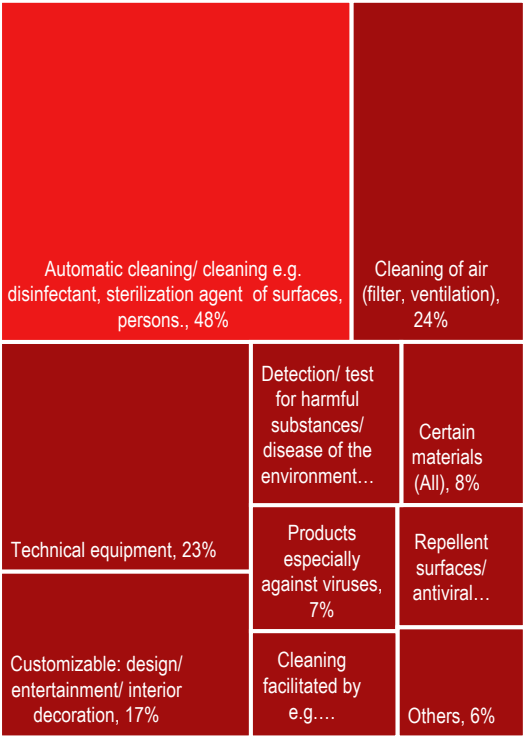
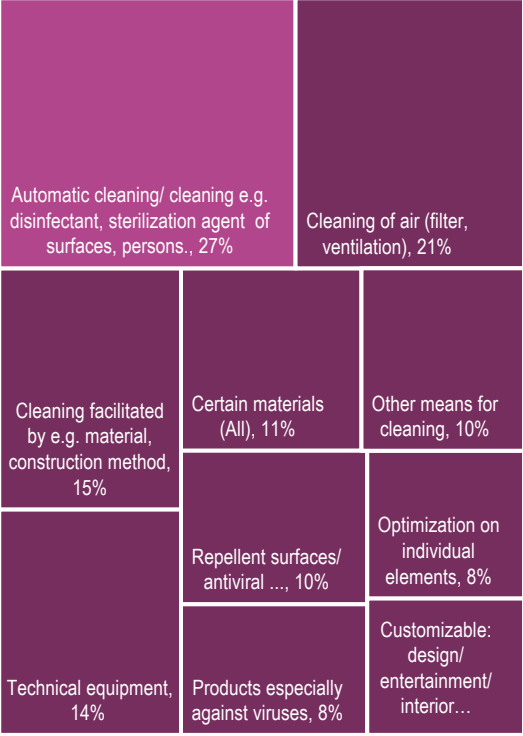
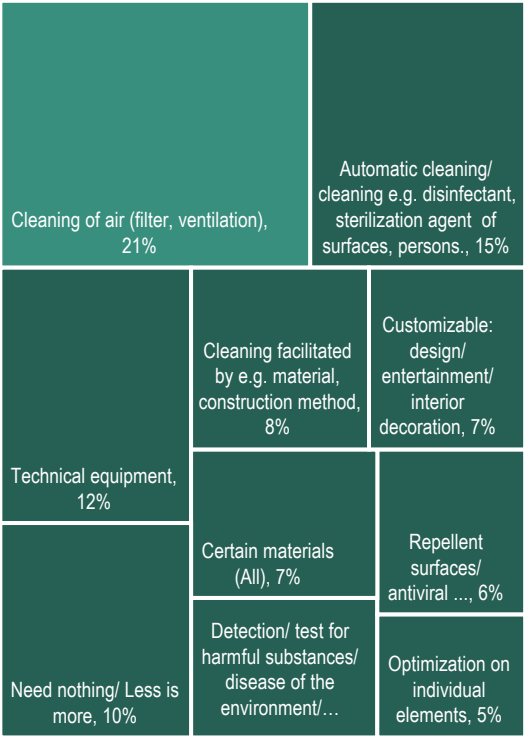
Benefit of hygienic features (Top2)



C.5. Imagine that you are planning to buy a new vehicle within the next year. How beneficial would the following features be for you personally? | Matrix. | Scale from 1 “not beneficial at all” to 5 “very beneficial” | Base: n_{DE}=500. n_{US}=500. n_{CN}=500. n_{JP}=500

Car drivers in all countries prefer two main developments in the interior of the future: automatic cleaning and an elaborate air filtration system.

New functions for vehicle interior (Top 10 per country)



All: E.3. [...] Please think about the changes caused by the pandemic and how you currently use your car: What functions or new developments would you like to see in the vehicle interior in the future? [...] | Open field | Base: n_{DE}=334. n_{US}=399. n_{CN}=437. n_{JP}=329.