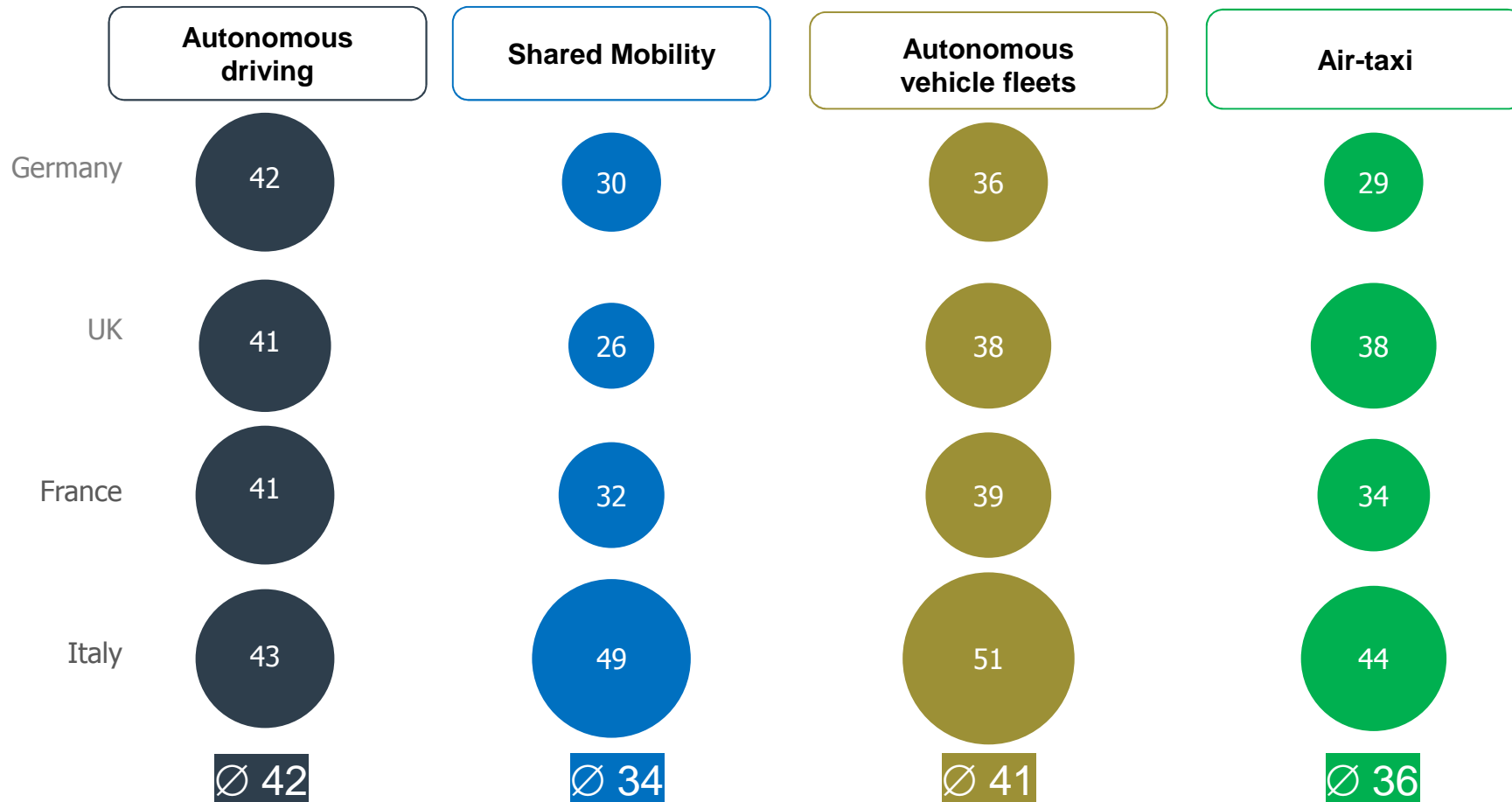


According to respondents, autonomous driving and electric vehicle fleets will have the strongest influence on the future of mobility.

What do you think, to what extent will the following mobility option impact the mobility behavior in the future in general?
(scale from 1 to 5: 1= doesn't impact mobility in the near future 5=Completely impacts mobility in the near future)

Top2Box (scale points 4+5); answers in % (rounded)



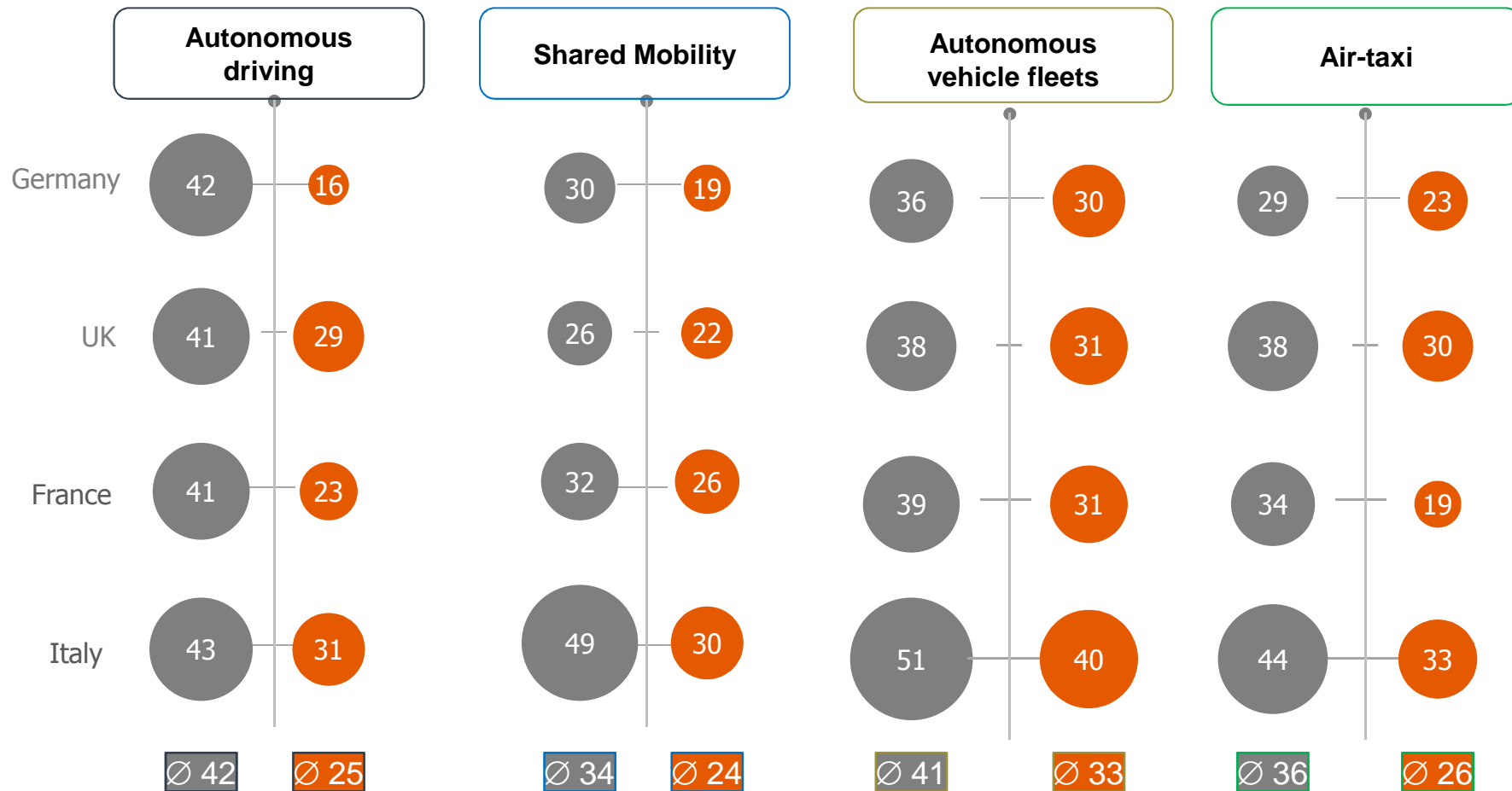
Source: On the road again - Global survey on millennials' attitudes towards current and future mobility (GfK Verein and GfK Automotive); n = approx. 250 respondents per concept on average

Self-driving vehicle fleets have the highest probability of use in all four countries.

Future impact and likelihood to use of various mobility options

Top2Box (scale points 4+5); answers in % (rounded)

- Completely/ very much impacts mobility in the near future
- Would like to use extremely/ very likely in the future



Source: On the road again - Global survey on millennials' attitudes towards current and future mobility (GfK Verein and GfK Automotive); n = approx. 250 respondents per concept on average

Reservations relating to safety are the biggest obstacle for almost all concepts.

Question: Why don't you intend to use this option in the future? What are your doubts?

Answers in % (rounded), Subsample: all respondents, who are not likely to use the selected scenario





Barriers (Top 10) Average across all countries (Germany)	Ø across all concepts	Autonomous driving	Shared Mobility	Autonomous vehicle fleets	Air-taxi
Concerns about safety issues	33 (42)	32 (39)	22 (20)	34 (50)	44 (58)
Worries about loss of control	29 (29)	31 (32)	20 (13)	28 (31)	36 (38)
No real benefits for me	22 (26)	26 (30)	26 (27)	15 (20)	22 (30)
Concerns about data security	21 (32)	27 (39)	20 (28)	19 (31)	19 (29)
Worries about additional costs	21 (21)	25 (28)	22 (23)	20 (16)	15 (18)
No trust in technology	20 (29)	18 (27)	13 (13)	21 (31)	29 (46)
Just frightening	16 (17)	14 (18)	6 (3)	17 (18)	29 (27)
This will not work	16 (27)	12 (19)	11 (23)	15 (22)	25 (42)
Restricted freedom of choice	15 (20)	16 (21)	23 (30)	14 (17)	9 (13)
No more fun at driving	15 (18)	19 (24)	16 (17)	15 (18)	9 (12)

Source: On the road again - Global survey on millennials' attitudes towards current and future mobility (GfK Verein and GfK Automotive); n= between 578 and 662 (all countries) or between 141 and 174 respondents (Germany)

Enjoying the view, listening to the radio or music and surfing the Web – these are most popular ways to spend free time in autonomous driving.

Question: Please imagine that you use **Autonomous driving** in the future. When driving autonomously, you will have free time during the ride. How would you like to spend this time?

Answers in % (rounded), Subsample : All respondents, who answered for Autonomous driving

Use of time gained	∅ across all 4 countries				
Enjoy scenery/ surroundings	36	31	35	42	39
Listen to music, radio, news, audio books	36	30	42	39	32
Surf internet	33	34	32	35	29
Have a rest/ sleep	32	32	37	34	26
Eat, drink	28	30	33	29	19
Read books, magazines or newspapers (copies or online)	28	29	30	26	26
Talk to other people in the car / on the phone	27	25	29	28	25
Send e-Mails, messages	25	29	24	27	20
Watch movies, TV series or video clips	24	16	28	31	20
Can't imagine that I will do something else than driving	19	24	11	22	18
Do nothing, take a break	19	25	14	22	14
Have a massage	18	16	15	19	21
Work	18	21	20	17	13
Talk to other people via video calls	16	15	14	16	18
Play games	15	12	19	19	10
Do styling, makeup or shaving	9	7	10	12	6
Exercise	8	7	12	4	8

Source: On the road again - Global survey on millennials' attitudes towards current and future mobility (GfK Verein and GfK Automotive); n = approx. 250 respondents per country



—

Background/ and detailed information for Download

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Background information: Future mobility options.

Overview of future mobility options



Autonomous driving

The **car as another space to live** besides home and work – electric, connected and autonomous.

When **cars drive electrically and autonomously**, additional services help the driver. The car knows each driver and makes certain settings automatically, e.g. sets the drivers' seat. It helps with navigation, reads out the weather forecast at the destination and looks for the next charging possibility on the way automatically. The car plays the drivers' favorite music and reads out the latest updates on the drivers' social networking or news sites.



Shared Mobility

A broad public transportation system offering, completed by **different sharing concepts and innovative mobility services** of private providers. Virtual mobility assistants suggest users the ideal travel option – taking all transportation options into consideration.



Autonomous vehicle fleets

People living in cities will be picked up automatically by **autonomously driving electric vehicles**, which transport them directly to their destination. The rides can be booked exclusively or for travelling with other people (this saves money).



Air-taxi

Cities are growing, traffic is increasing and so are traffic jams. But in the future, people living in cities will get from one point in the city to another by air-taxi or taxi drones. The **autonomously flying drones** can carry single passengers and their bag. The drone is electric-powered and can travel for about half an hour. Passengers do not need to learn how to fly the drones, they fly autonomously: "Just press a button and then it takes off, flies from point A to point B, and lands."



Detailed information.

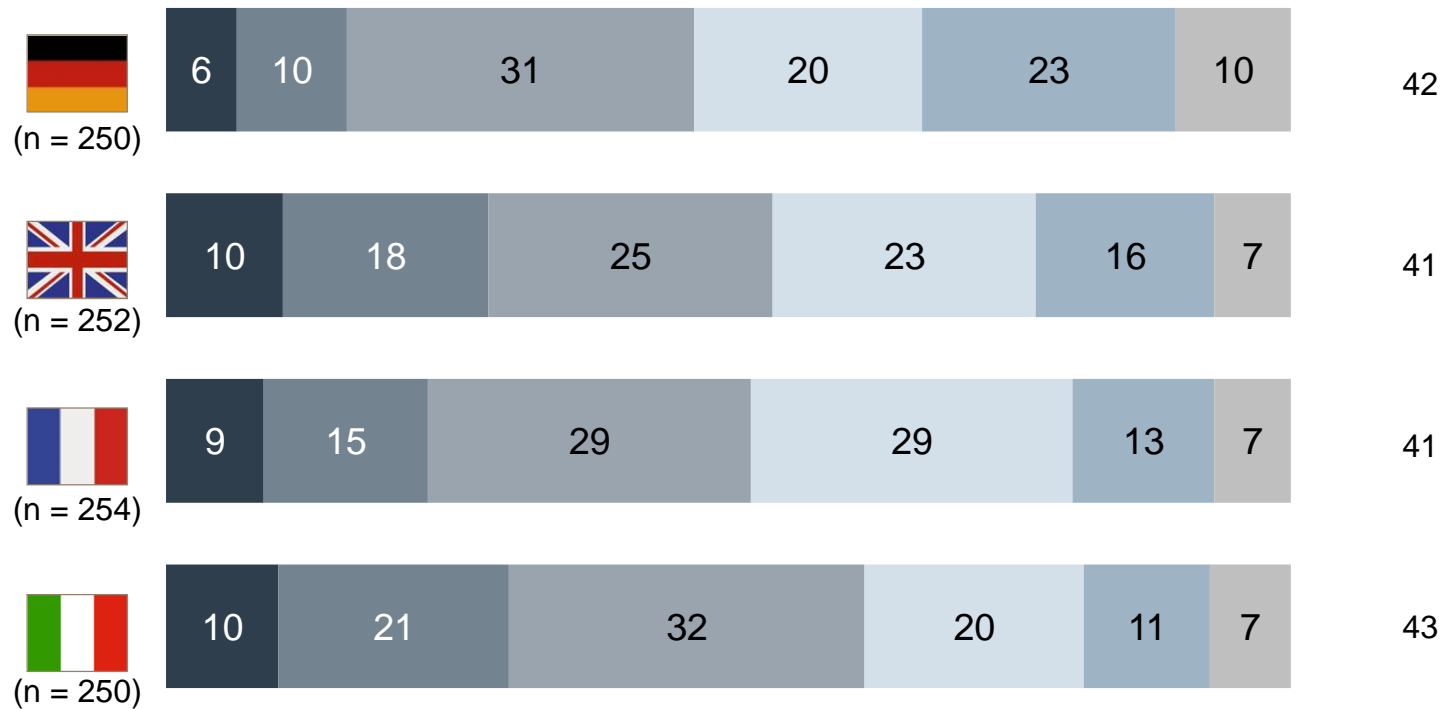
Autonomous driving – Likelihood to use

Answers in % (rounded)

Would like to use ...

extremely likely
 very likely
 somewhat likely
 not very likely
 not at all likely
 Don't know

Future impact on mobility (TB2)



Source: On the road again - Global survey on millennials' attitudes towards current and future mobility (GfK Verein and GfK Automotive)

Detailed information.

Shared Mobility – Likelihood to use

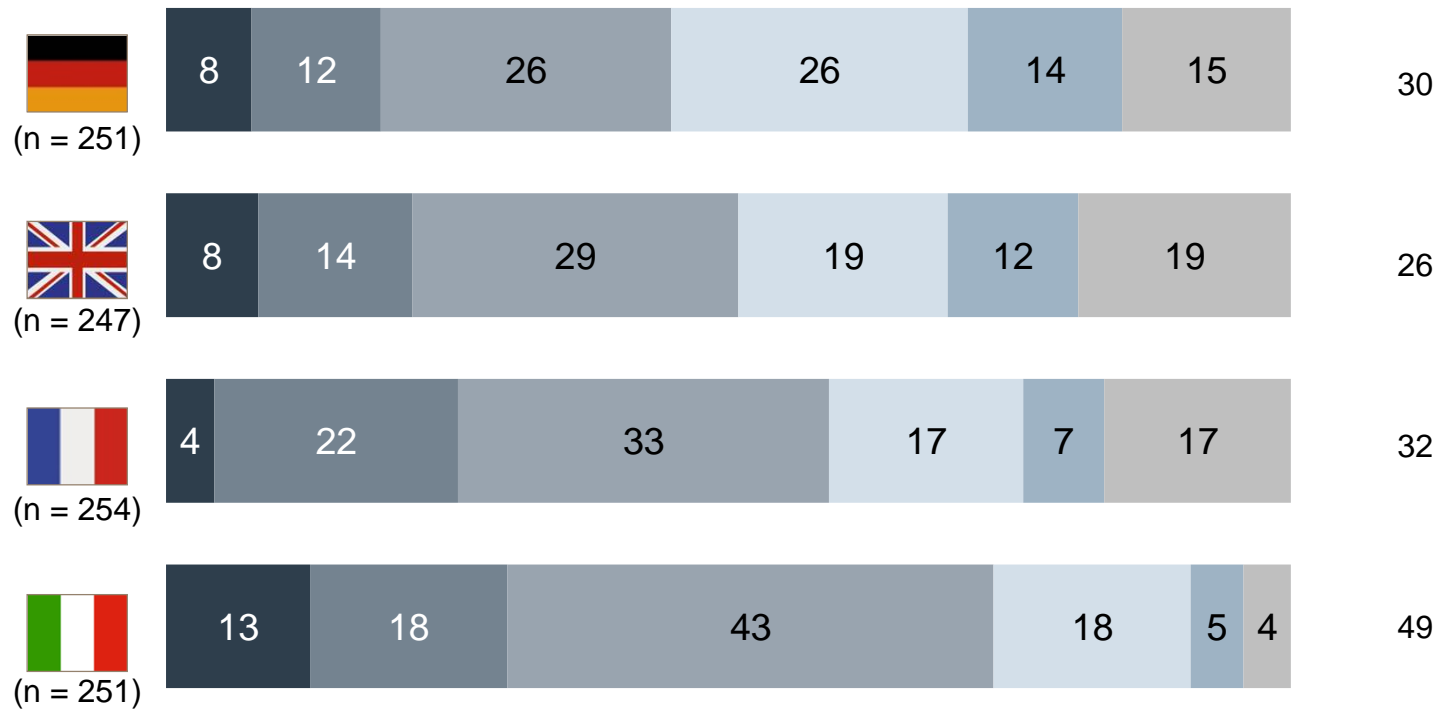
Answers in % (rounded)



Would like to use ...

extremely likely
 very likely
 somewhat likely
 not very likely
 not at all likely
 Don't know

Future impact on mobility (TB2)



Source: On the road again - Global survey on millennials' attitudes towards current and future mobility (GfK Verein and GfK Automotive)



Detailed information.

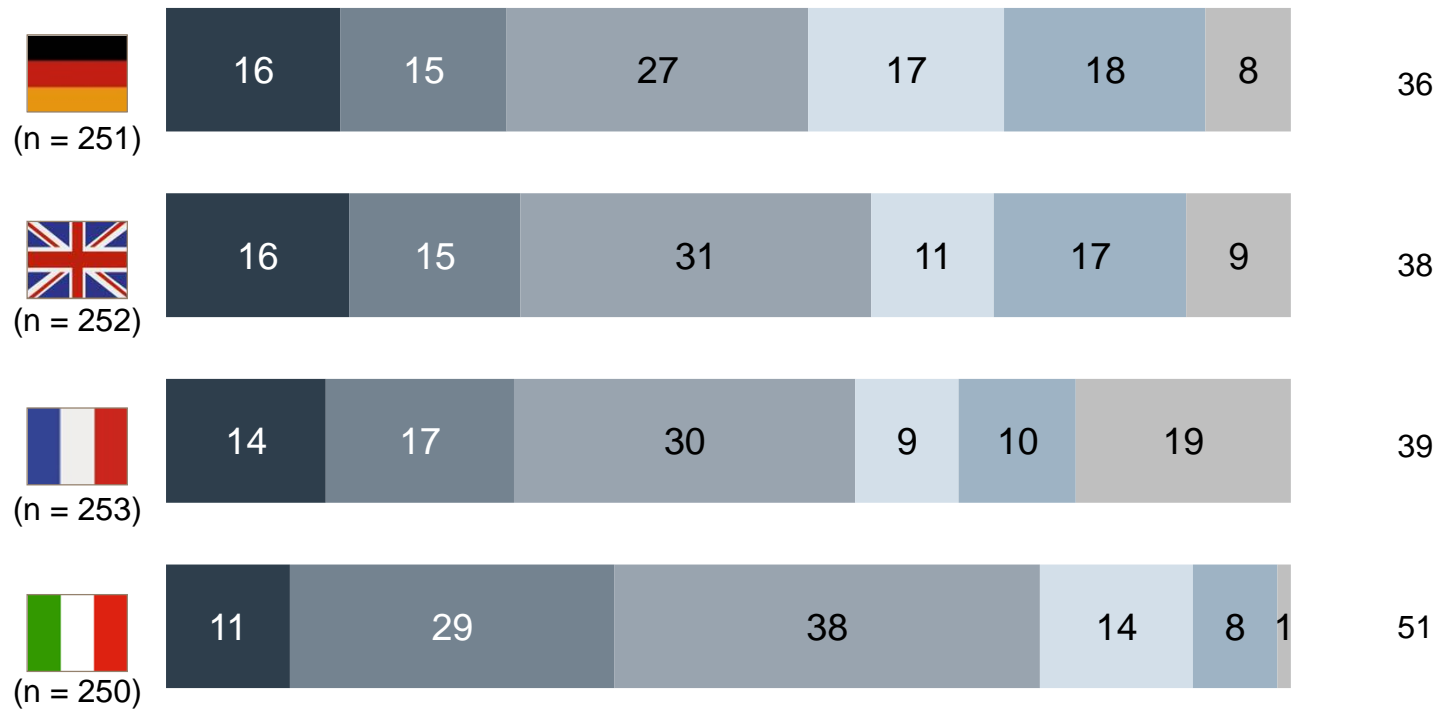
Autonomous vehicle fleets – Likelihood to use

Answers in % (rounded)

Would like to use ...

extremely likely
 very likely
 somewhat likely
 not very likely
 not at all likely
 Don't know

Future impact on mobility (TB2)



Source: On the road again - Global survey on millennials' attitudes towards current and future mobility (GfK Verein and GfK Automotive)



Detailed information.

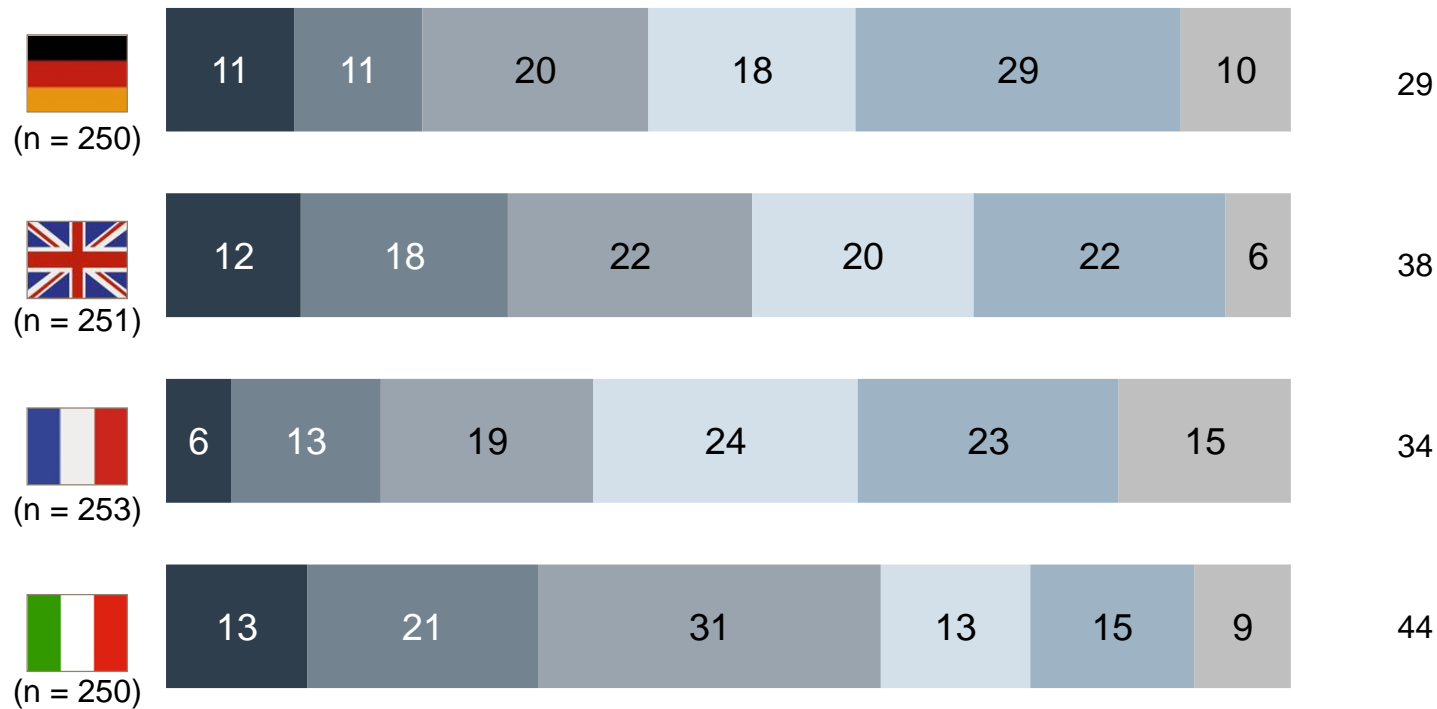
Air-taxi – Likelihood to use

Answers in % (rounded)

Would like to use ...

extremely likely
 very likely
 somewhat likely
 not very likely
 not at all likely
 Don't know

Future impact on mobility (TB2)







Source: On the road again - Global survey on millennials' attitudes towards current and future mobility (GfK Verein and GfK Automotive)

Study design.

Method

Source:	Survey of GfK Verein and GfK Automotive “On the road again - Global survey on millennials’ attitudes towards current and future mobility”
Methodology:	Computer Assisted Web Interview (CAWI)
Survey period:	May until June 2017
Target persons:	General population (D / F aged 17 years and above; UK / Italien aged 17 to 65 years)
Sample:	All 4 countries N= 4.019 persons
Out of these:	
Germany	n = 1,002
France	n = 1,014
United Kingdom	n = 1,002
Italy	n = 1,001
For subsamples see Number of cases per country and concept	

Study design: Number of cases per country and concept.

Europe	 Germany	 France	 United Kingdom	 Italy
Total sample	1,002	1,014	1,002	1,001
Out of these				
Evaluation of scenario ...				
Autonomous driving	250	254	252	250
Shared Mobility	251	254	247	251
Autonomous vehicle fleets	251	253	252	250
Air-taxi	250	253	251	250
Respondents who are <u>not likely</u> to use the selected scenario				
Autonomous driving	174	172	162	154
Shared Mobility	165	155	154	151
Autonomous vehicle fleets	141	147	148	142
Air-taxi	165	159	154	148