



DRIVE ME HAPPY

How drivers feel behind the wheel and what affects their emotions in the driving seat



PEOPLE STILL LOVE DRIVING

The amount of time we spend behind the wheel is not insignificant.

On average, drivers around the world spend more than five hours each week in their cars, which equates to almost a full day every month. Drivers in China and Russia spend even more time in their cars: seven hours per week.

In an extensive multi-country study we surveyed 5,800 consumers in Brazil, China, Germany, Russia, the UK and the USA to find the keys to their emotional relationship with cars.

As the connected car gets ever closer to becoming a reality, so does the ability to revolutionize tomorrow's driving experience and offer new functionalities that meet drivers' emotional needs more effectively.

We also gained unprecedented insight into how they really feel and what car manufacturers can do to ensure they create connected cars that deliver the increasingly important feel-good factor.

Happy in the driving seat

Drivers across the world are typically happy and the emotions most readily associated with driving are positive. Globally, 56% of drivers describe themselves as being "happy", 54% as "free" and a further 52% as "peaceful". It is therefore clear that the majority of drivers enjoy a positive experience of driving and their time in the car.

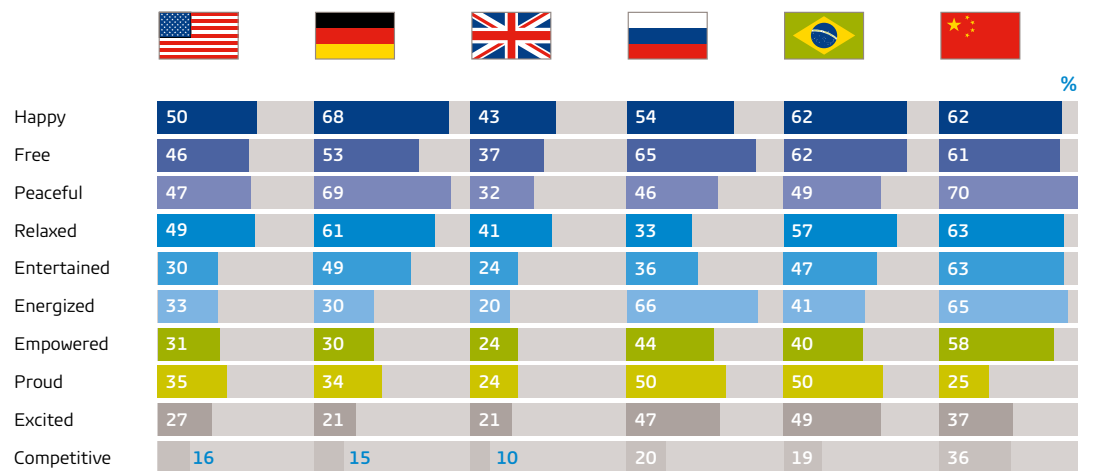
German drivers are the happiest of all – 68% describe themselves as being "happy", while drivers in the UK are the least likely to agree, at just 43%. Overall, drivers in Brazil, China and Russia have a slightly more positive relationship with driving than those in Germany, the UK and the USA.

Of all the countries surveyed, the Chinese have the most emotional relationship with driving, over-indexing on both positive and negative emotions compared to drivers in other markets.



In Brazil, China and Russia, drivers feel slightly more positive about driving than in Germany, the UK and the USA.

Across all countries, most drivers feel... **HAPPY**



Source: GfK Connected Car study, 5,800 consumers aged 16+, Nov 2014 (Brazil, China, Germany, Russia, the UK and the USA)

DRIVERS AND PASSENGERS

What can manufacturers do to ensure that the cars of the future offer the feel-good factor and meet drivers' emotional needs?

Understanding emotional aspirations

Our findings show that drivers are typically satisfied behind the wheel, but that their passengers would like to feel more relaxed. While drivers think that their needs and expectations are typically being met (or exceeded), passengers differ in their views.

Don't overlook the passengers

Most notably, 58% of passengers would like to feel "relaxed", but only 49% do so currently. There is a significant gulf between drivers and passengers when it comes to feelings of happiness and freedom, with drivers significantly ahead of passengers both in terms of their expectation and their current experiences.

Interestingly, it is passengers not drivers who would like to be more entertained. This wish was stated by 16% of drivers, while the proportion of passengers was almost double (30%). Results such as these highlight the need for manufacturers to

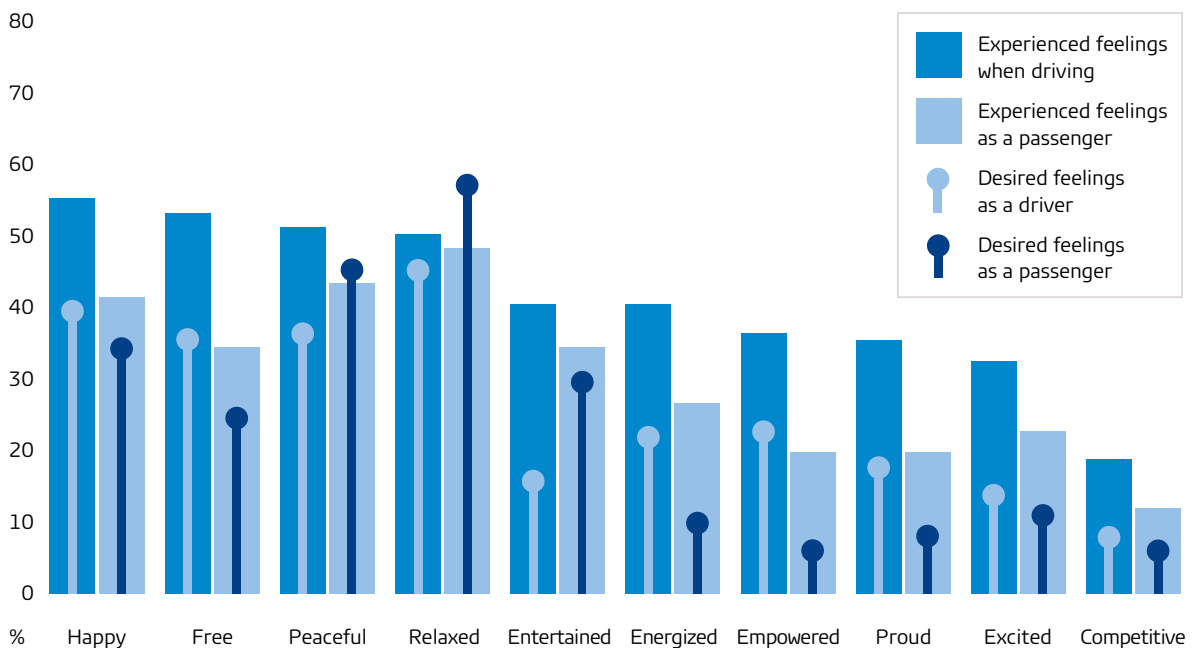
consider the views and motivations of multiple users when introducing new functionalities. While drivers' views will dominate, it is essential to understand the range of emotional needs amongst car users and interplay between these.

Delivering the feel good factor

We tested seven new connected car concepts with consumers and explored their reactions to them to give unique insight into how each are likely to be received. Of those tested, "Ultra Safe" – defined as "a car that makes driving as safe as possible through connectivity with other cars, cruise control and integrated cameras" – had the most appeal at 87%. "Data Tracker" – defined as "a vehicle that tracks usage, runs diagnostics, checks repair costs and automatically records accident data" – was the second most popular, at 79%.

While these two concepts came top in terms of functionality, will they connect with drivers emotionally and deliver the happiness drivers crave?

How drivers would like to feel whilst driving and how passengers would like to feel



Source: GfK Connected Car study, 5,800 consumers aged 16+, Nov 2014 (Brazil, China, Germany, Russia, the UK and the USA)

Unpacking emotional benefits: safety first

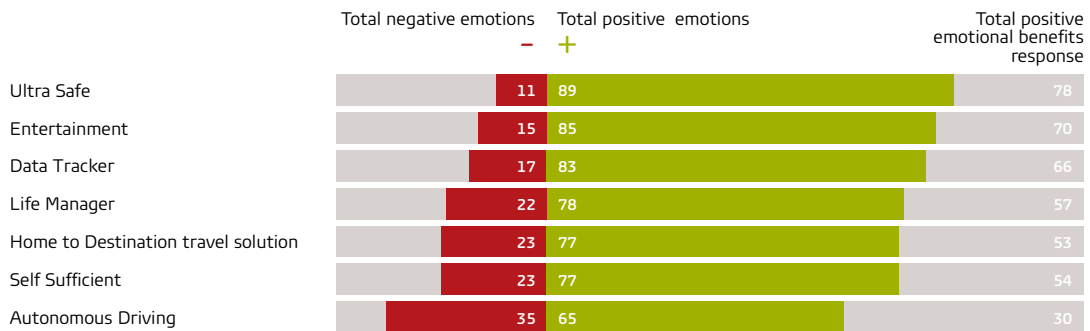
When we asked drivers to consider how they would feel when driving a car with each of the seven connected car concepts it was the “Ultra Safe” features that attracted the most positive emotional response.

With emotional benefits ranking at 78%, “Ultra Safe” offers the best opportunity to engage with drivers emotionally. This suggests that the traditional messages about safety and security continue to hold true – cars that will keep drivers and their loved ones safe have the most appeal. In contrast, there is little enthusiasm for autonomous driving, which only achieves an emotional benefit score of 30% and attracts a significant amount of negative emotions.

We asked consumers to evaluate seven connected car concepts

1. **Ultra Safe**, a car that makes driving as safe as possible. Connectivity with other cars, cruise control, integrated cameras
2. **Data Tracker**, a car that tracks usage, runs diagnostics, checks repair costs and automatically records accident data
3. **Entertainment**, a car that knows your entertainment preferences
4. **Life Manager**, a car that communicates with other connected devices in your home
5. **Home to Destination**, not a car but a travel solution. This app will take complete responsibility for a trip, identifying the best transport solution
6. **Self Sufficient**, a strong but light electric car
7. **Autonomous Driving**, a car that drives completely autonomously

The positive and negative emotions each connected car concepts brings



Source: GfK Connected Car study, 5,800 consumers aged 16+, Nov 2014 (Brazil, China, Germany, Russia, the UK and the USA)

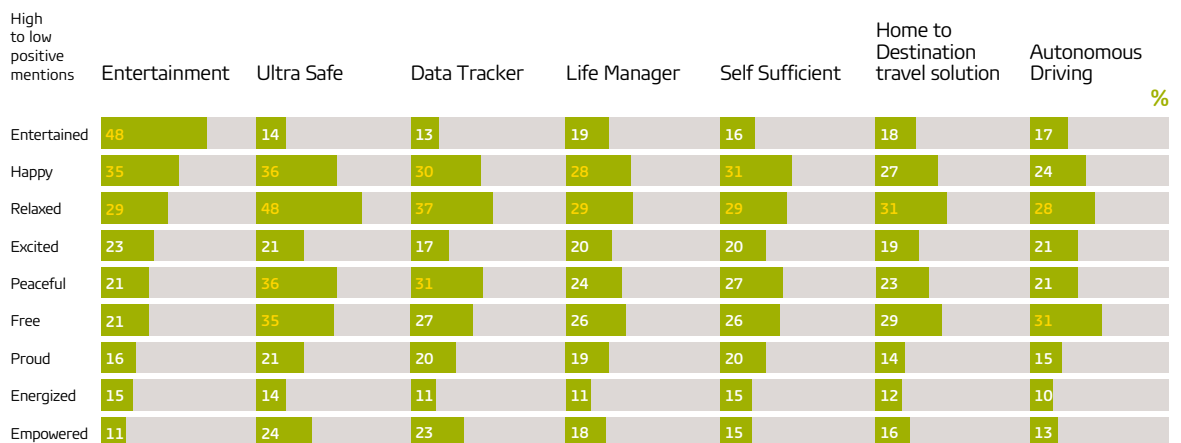
Although “Data Tracker” is the second most popular concept with drivers, it fails to deliver as much to drivers emotionally as “Entertainment”, which scores four percentage points higher at 70%. While drivers have told us that they want to be able to track their statistics, run diagnostics, check repair costs and record accident data automatically, further analysis shows that these features do not substantially enhance their enjoyment of their car or appeal to them strongly on an emotional level.

While there is undoubtedly substantial demand for these features amongst consumers globally, they do not offer the same potential to meet drivers’ emotional needs. When bringing these concepts to market, it will be important to differentiate between concepts that appeal on a purely functional level and those that have scope to tap into drivers’ more deeply held emotional needs.

THE EMOTIONAL BENEFITS ASSOCIATED WITH CONNECTED CARS

Evaluating seven connected car concepts across all consumers.

How each connected car concept makes people feel – positive emotions



Source: GfK Connected Car study, 5,800 consumers aged 16+, Nov 2014 (Brazil, China, Germany, Russia, the UK and the USA)

New concepts attract differing emotions

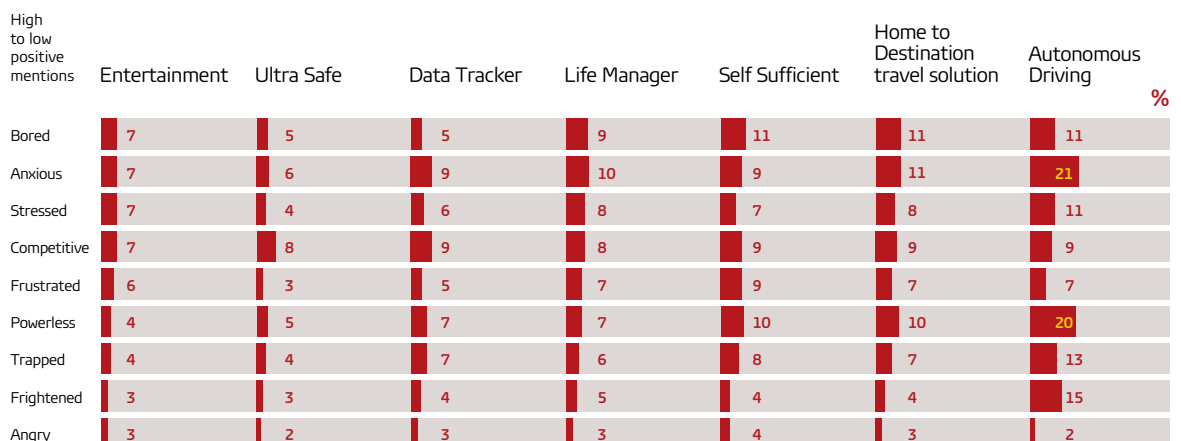
Focusing on the three most appealing concepts, further analysis reveals that new connected car concepts trigger a wide variety of emotions in consumers.

“Ultra Safe” equals relaxed and happy

The “Ultra Safe” concept taps into a need to feel relaxed, with 48% across all markets claiming they would feel relaxed using the concept, rising

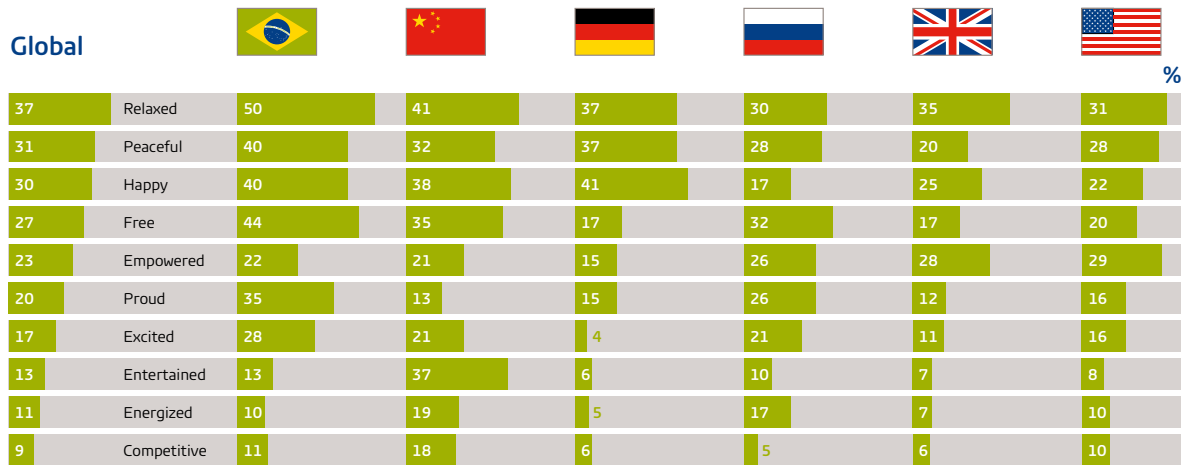
to 55% in Germany. As well as enabling drivers to feel relaxed, “Ultra Safe” is associated with feelings of being “peaceful” and “happy”, with both attributes scoring 36%. With attitudes towards this concept being so positive and drivers associating it with clear emotional benefits, we anticipate “Ultra Safe” becoming one of the trailblazing features of the connected car that will have worldwide appeal.

How each connected car concept makes people feel – negative emotions



Source: GfK Connected Car study, 5,800 consumers aged 16+, Nov 2014 (Brazil, China, Germany, Russia, the UK and the USA)

How people feel about the Data Tracker concept - positive emotions



Source: GfK Connected Car study, 5,800 consumers aged 16+, Nov 2014 (Brazil, China, Germany, Russia, the UK and the USA)

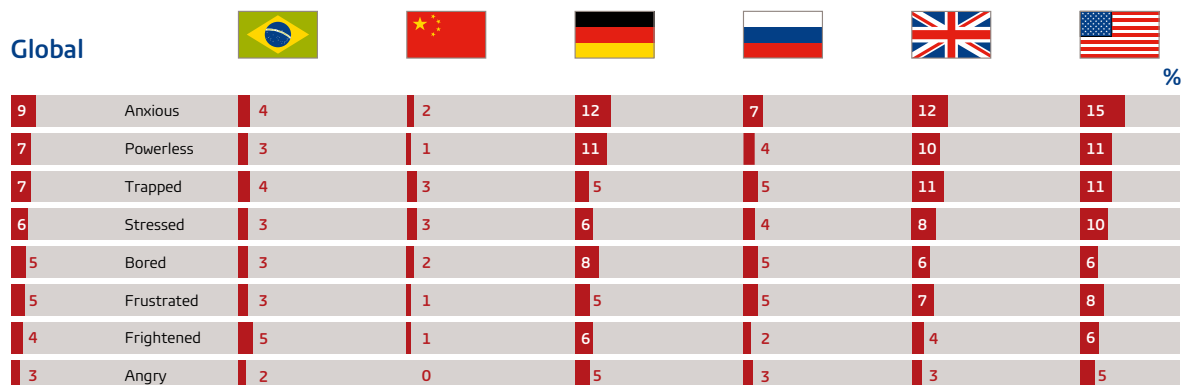
Don't stop the music

Reactions towards the "Entertainment" concept vary slightly more by market, but with 48% of consumers saying that they would feel "entertained", it is clear that the concept holds substantial emotional appeal. It has the biggest emotional appeal for drivers in China and the US where the figures rise to 51% and 50%, respectively.

Data Tracker divides opinions

Although "Data Tracker" is the second most popular connected car concept among drivers globally, there is significant variation in terms of how drivers feel about this development. While 37% say that they would feel "relaxed" and another 31% "peaceful" using the concept, we notice a range of emotions being cited by drivers, including negative emotions in some cases. 9% would feel "anxious" and this figure rises to 15% in the USA and 12% in both the UK and Germany. These negative emotions may be due to concerns amongst some consumers about data privacy.

How people feel about the Data Tracker concept - negative emotions



Source: GfK Connected Car study, 5,800 consumers aged 16+, Nov 2014 (Brazil, China, Germany, Russia, the UK and the USA)

SAFETY FIRST: THE ROAD TO AUTONOMOUS DRIVING

Not so long ago it was a concept associated with science fiction. Now the dream of the autonomous car is on its way to becoming reality.

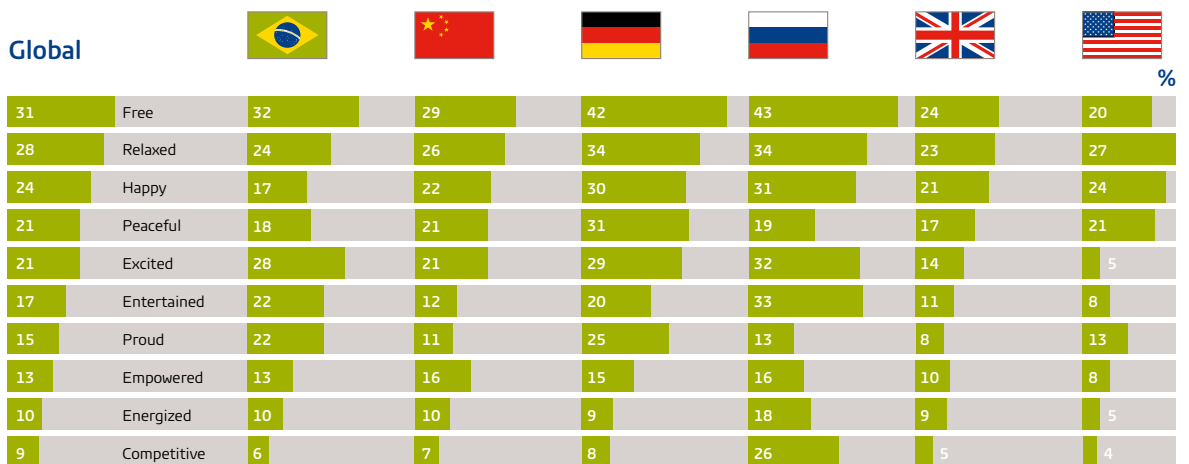
Autonomous driving raises concerns

Similarly, autonomous driving elicits a range of negative emotions and causes high levels of anxiety (21%). Drivers in the the UK and the USA, in particular, associate the concept with feelings of “powerlessness” (33%) and anxiety (28% in the UK, 27% in the USA).

This high incidence of negative emotions suggests that there is a need for better communication with consumers to educate them about the benefits of autonomous driving. While the technology is almost in place to make autonomous driving a reality, drivers are not yet ready to welcome this advancement. Manufacturers must therefore work hard to articulate the benefits of autonomous driving in a way that is meaningful to drivers to gain their trust.

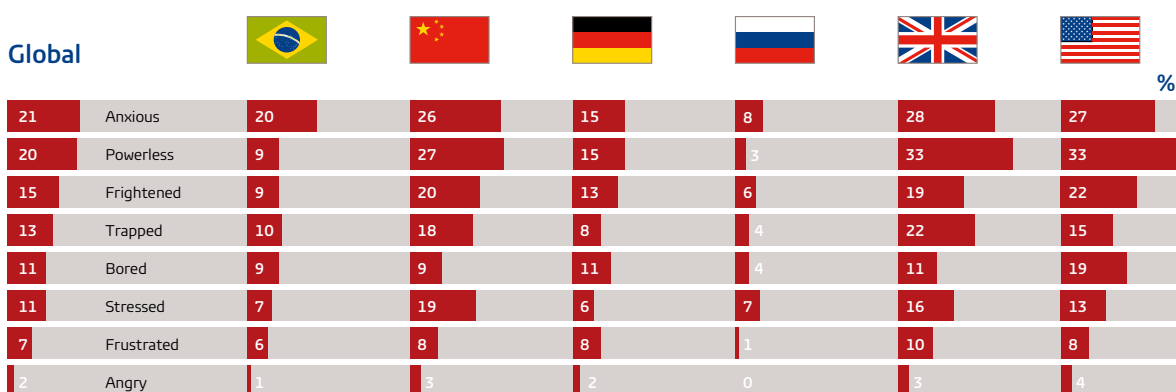
Educating consumers about the true benefits of autonomous driving is key.

How people feel about autonomous driving – positive emotions



Source: GfK Connected Car study, 5,800 consumers aged 16+, Nov 2014 (Brazil, China, Germany, Russia, the UK and the USA)

How people feel about autonomous driving – negative emotions



Source: GfK Connected Car study, 5,800 consumers aged 16+, Nov 2014 (Brazil, China, Germany, Russia, the UK and the USA)

How the connected car can make drivers and passengers happy

The possibilities offered by connected cars are without a doubt tremendous. We are moving into an exciting new era where developments in technology mean that drivers can enjoy previously unimaginable levels of safety, comfort, entertainment and convenience. Understanding what drivers want in terms of functionality is part of the challenge of making the car of the future a reality for consumers worldwide. However, if manufacturers are going to make the car of the future a commercial success, it is vital they understand which features and benefits meet drivers' emotional needs.

Our extensive work with consumers worldwide has shown that a car is both a functional and an emotional purchase, with the latter arguably carrying more sway in the decision-making process. While there is much excitement surrounding the technological possibilities offered by the connected car, manufacturers must not lose sight of what's important to drivers and which elements are tugging at their heartstrings and, in turn, their wallets. While enhanced safety features lack the glitz of more futuristic features, such as autonomous driving or self-sufficient cars, our research clearly shows that it is the more seemingly mundane features that have by far the strongest emotional appeal for drivers at this point.

Finally, it is important to consider that while drivers will always be the main decision-maker when it comes to a purchase, there is a wider audience to consider. While drivers' emotional needs are largely being met, our research has shown significant deficiencies when it comes to meeting passengers' emotional needs. Improving the passenger experience provides an opportunity to differentiate. This should not be overlooked.

While there is much excitement surrounding the technological possibilities offered by the connected car, manufacturers must not lose sight of what's important to drivers and which elements are tugging at their heartstrings and, in turn, their wallets.

Get our Connected Car report

Download our **free preview report** or get the full insights in our global report, which is available to purchase now. It contains detailed market-by-market analysis and brand specific insight.

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