

Study on autonomous driving: What time and comfort are worth to motorists

Value-added services during autonomous driving are developing into a billion-figure market, promising car companies and suppliers revenues that can mitigate or head off losses caused by dwindling sales of traditional motor vehicles. The automobile industry is going to have to share the market potential, however, with technology companies (devices, online services).

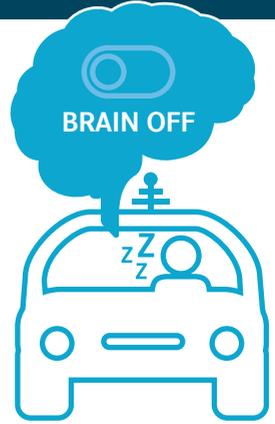
The study by Horváth & Partners and the Fraunhofer IAO shows the willingness to pay for value-added services during autonomous driving that providers can expect as well as the aspects that are particularly important to motorists.

Study information

Some 1,500 motorists in Germany, the U.S. (California), and Japan were surveyed on possible activities during autonomous driving and the associated willingness to pay.



Scenario A
The automated car



Scenario B
The driverless capsule

Average monthly willingness of motorists to pay for more time and comfort with autonomous driving:

Three quarters of motorists surveyed (across all three countries) are prepared to pay for value-added services



Of most value to motorists are value-added services for communication and productivity as well as for fulfilling basic requirements

Automated car (Scenario A)



Average willingness to pay per need



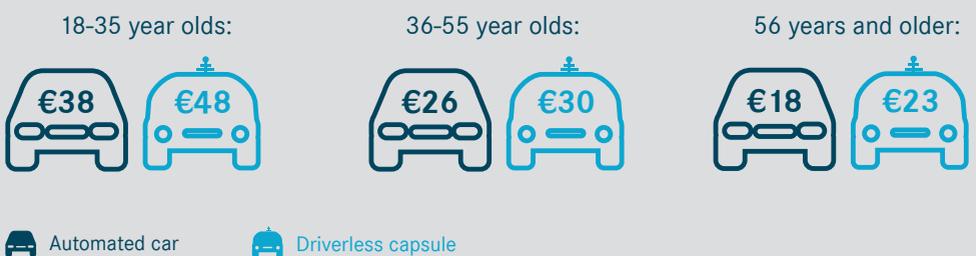
Driverless capsule (Scenario B)



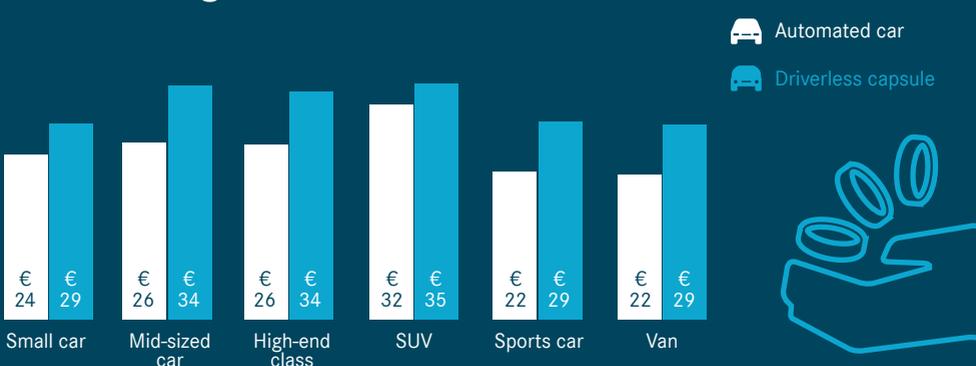
Average willingness to pay per need



The monthly willingness to pay is highest among young drivers aged between 18 and 35 years



The average monthly willingness to pay per need is precisely as high among drivers of small cars as among drivers of higher vehicle classes



Source: Horváth & Partners, Fraunhofer-Institut für Arbeitswirtschaft und Organisation (IAO), Study "The Value of Time - Potential for user-centered services offered by autonomous driving" (2016)