



The Harris Poll

Harris Insights & Analytics, A Stagwell LLC Company

2022

Harris Poll AutoTECHCAST

Introduction

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What AutoTECHCAST Covers

Automotive manufacturers and suppliers need to innovate and differentiate to capture new business and build brand equity. Selecting and integrating the right advanced technologies—those that **drive business performance, product differentiation and customer loyalty**—is essential.

The annual Harris Poll US AutoTECHCAST (ATC) reflects the perspectives of nearly **10,000 current vehicle owners** and provides an in-depth assessment of a wide assortment of emerging automotive technologies in the areas of:

Tech Categories





2022 AutoTECHCAST Technology List

COMFORT & CONVENIENCE



COMFORT

- Active Noise Cancellation
- Automatic Window Tinting
- Interior/Exterior Air Quality
- **Advanced Cabin Air Filter ★**

CONNECTIVITY

- Smartphone As Key
- Smartphone Linked Media/Navigation
- Vehicle Internet Connectivity
- In-Car Payments System
- **Streaming Media ★**
- **Interactive Gaming ★**
- **Front Passenger Screen ★**

CONVENIENCE

- Driver Recognition System
- Touchless Door Opening/Closing
- Wireless Mobile Device Charging System
- Auxiliary Power Generator
- Smart Home Ecosystem Integration
- **EV/Fuel Route Planning Systems ★**

SAFETY



DRIVE MONITORING & ALERTS

- Driver Monitoring System
- Vehicle-to-Vehicle Communication

DRIVER ASSISTANCE

- Enhanced Collision Mitigation System
- Low-Speed Collision Avoidance system

VEHICLE MONITORING & SECURITY

- Remote Vehicle Diagnostics
- Vehicle Cybersecurity Solution
- Remote Camera Monitoring
- **Over the Air Updates ★**

VISIBILITY

- Anti-Glare Windshield
- Augmented Reality Head-Up Display
- Camera Monitoring System (E-Outside Mirror)
- Full Digital Display Rear View Mirror
- Surround View Camera System
- Safe Exit

FUEL EFFICIENCY



FUEL SAVING & ALTERNATE FUEL

- Battery Electric Engine
- Hybrid Electric Engine
- **Fuel Cell Engine ★**

AUTONOMOUS VEHICLES



AUTONOMOUS & SEMI-AUTONOMOUS

- Automatic Parking System
- Autonomous Valet
- Traffic Jam Assist
- Fully Self-Driving
- City and Highway Assisted Self-Driving
- Highway Assisted Self-Driving

*Levels of
Autonomy
Explored*

PLUS DEEP DIVE SECTIONS ON:

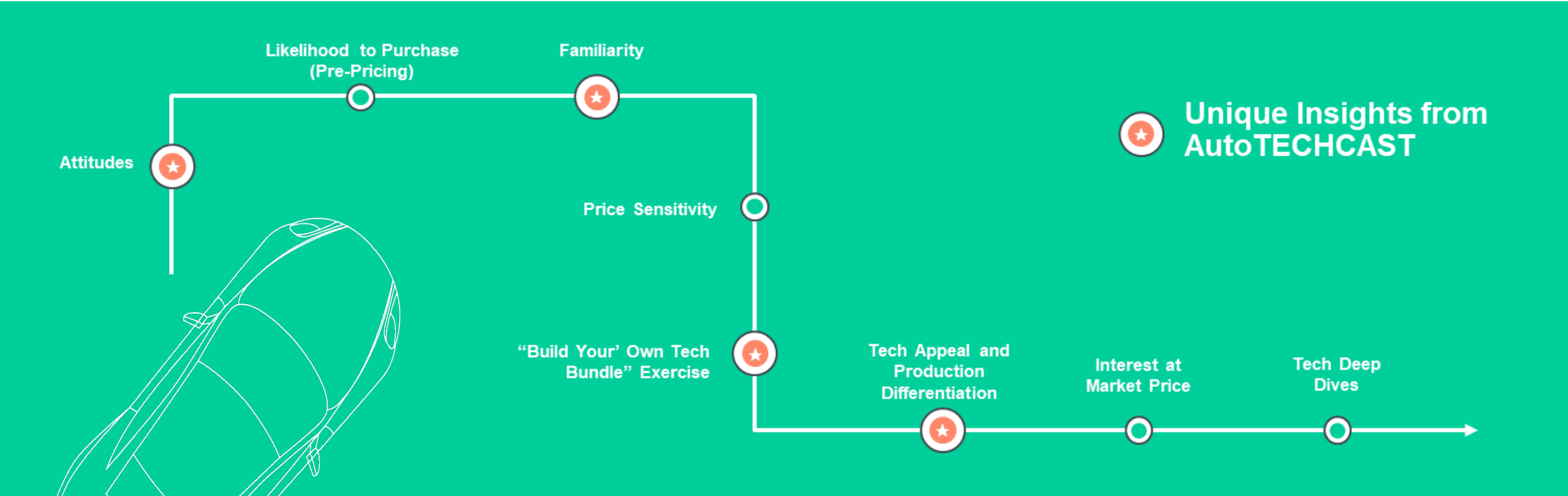
- Autonomous Vehicles
- Connected Car
- Electric Vehicles





Study Scope and Flow

Technology attributes included in AutoTECHCAST





A Powerful Database

AutoTECHCAST is a powerful database that allows analysts to drill down on selected technologies of interest to provide detailed profiles of technology adopters, examine specific segments, and even profile individual brands where sample sizes permit.

	Compact Car	Mid-Size Car	Compact Pickup	Light/Heavy Duty Pickup	Entry SUV/Crossover	Mid-Large SUV/Crossover	Compact Van	Full-Size Car	Sports Car	Luxury Car	Luxury SUV/Crossover	Total
Base	347	329	104	242	348	355	306	217	179	272	232	2931
Navigation system	29%	33%	38%	28%	36%	38%	37%	37%	26%	38%	48%	34%
Remote Door Unlock	36%	29%	41%	41%	37%	38%	49%	36%	23%	20%	19%	34%
Back-up Camera	17%	28%	19%	41%	30%	40%	45%	27%	20%	32%	47%	30%
Hands-Free Calling	32%	34%	20%	28%	35%	24%	18%	20%	31%	28%	25%	29%
Emergency Service Notification	17%	34%	18%	22%	25%	21%	19%	31%	15%	15%	22%	23%
Satellite Radio	16%	19%	23%	25%	22%	27%	19%	19%	25%	18%	18%	21%
Stolen Vehicle Locator and Immobilizer	20%	20%	20%	21%	15%	17%	14%	24%	19%	25%	17%	19%
Integrated iPod/MP3 Player	22%	11%	16%	14%	15%	12%	9%	7%	23%	12%	11%	15%

	Compact Car	Mid-Size Car	Compact Pickup	Light/Heavy Duty Pickup	Entry SUV/Crossover	Mid-Large SUV/Crossover	Compact Van	Full-Size Car	Sports Car	Luxury Car	Luxury SUV/Crossover	Total
Base	105	112	58	91	104	115	112	107	80	115	110	1109
Too Inexpensive	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$75	\$50
Good Value	\$150	\$100	\$150	\$125	\$150	\$150	\$200	\$200	\$150	\$200	\$200	\$150
Expensive	\$300	\$200	\$250	\$200	\$300	\$300	\$300	\$350	\$300	\$378	\$300	\$300
Too Expensive	\$430	\$300	\$350	\$500	\$400	\$500	\$500	\$500	\$400	\$500	\$500	\$450



Monitoring Technology Trends

Having historical data provides the ability to track how awareness, marketing and pricing impact the consumer adoption curve. This data can be further mined to look for adoption trends over time by vehicle segment and demographics.

Example Dummy Data

Technology Categories	Average % Difference Between 20XX and 20XX		
	Initial Familiarity Extremely/Very Familiar	Inclusion on Next Vehicle Extremely/Very Likely	Consideration at Market Price Extremely/Very Likely
Entertainment	- 0.7%	+ 0.2%	+ 2.2%
Exterior Comfort and Convenience	+ 1.4%	- 1.8%	+ 1.6%
Intelligent Sensing	+ 3.9%	+ 3.4%	+ 6.0%
Interior Comfort and Convenience	+ 1.8%	+ 1.3%	- 4.2%
Lighting	+ 2.0%	+ 3.5%	+ 3.0%
Powertrain and Alternative Fuels	+ 0.1%	+ 1.5%	- 0.7%
Safety	+ 1.5%	+ 2.7%	+ 1.7%
Telematics	- 0.3%	+ 2.9%	+ 2.6%



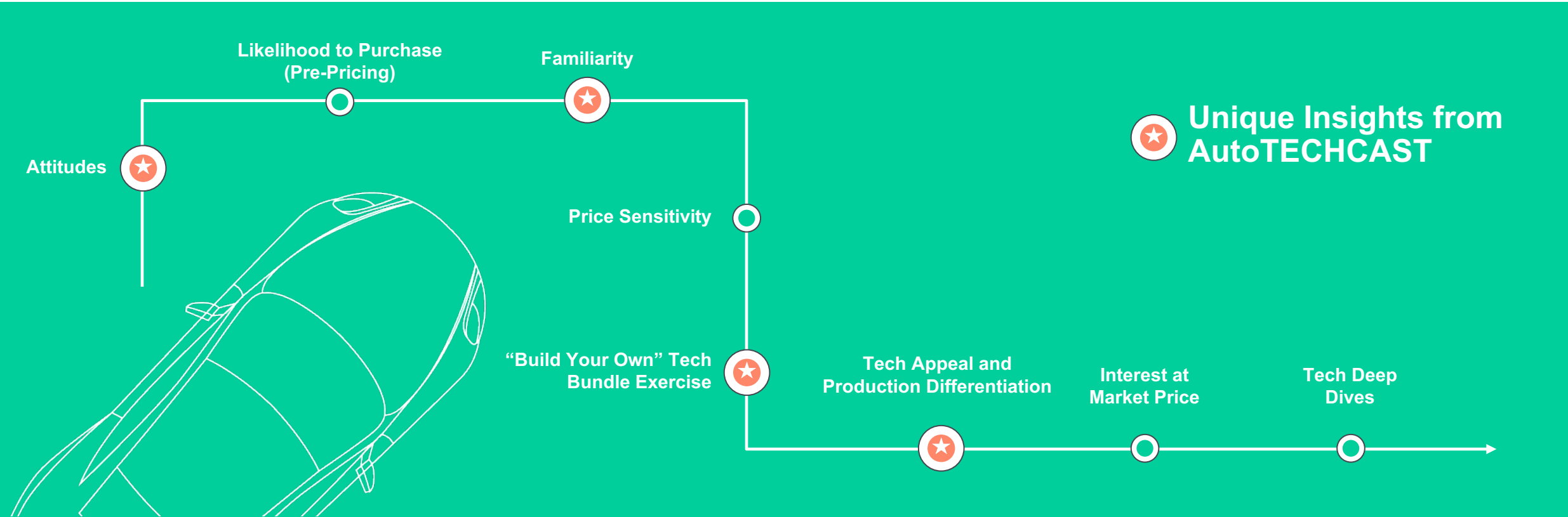
Example Questions the Study Helps Answer

- How are attitudes toward in-vehicle technology changing?
- Which features are gaining/losing momentum in terms of interest?
- How much are consumers willing to pay for a feature?
- What are the price/volume trade-offs of a feature?
- Which features are most important to attracting Millennials?
- How does interest in a technology or package of features vary by segment?
- What features do my brands owners/intenders prefer?
- Which features are most used, seldom used?
- Which features of a package drive the most interest?
- What is the optimal price point to generate the maximum demand?
- How much autonomy is the consumer willing to accept?
- What will convert drivers with gas engines to electric vehicles?



Study Scope And Flow

Technology attributes included in AutoTECHCAST

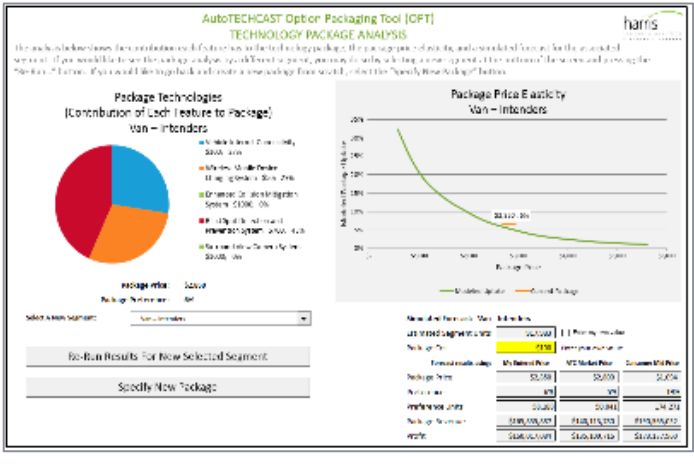
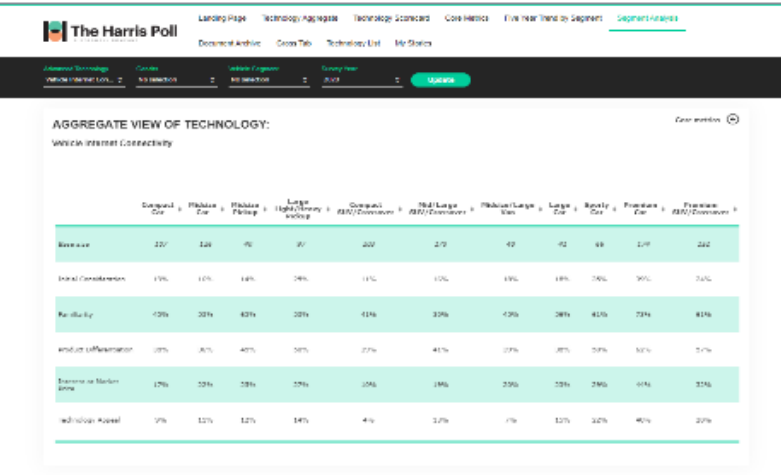
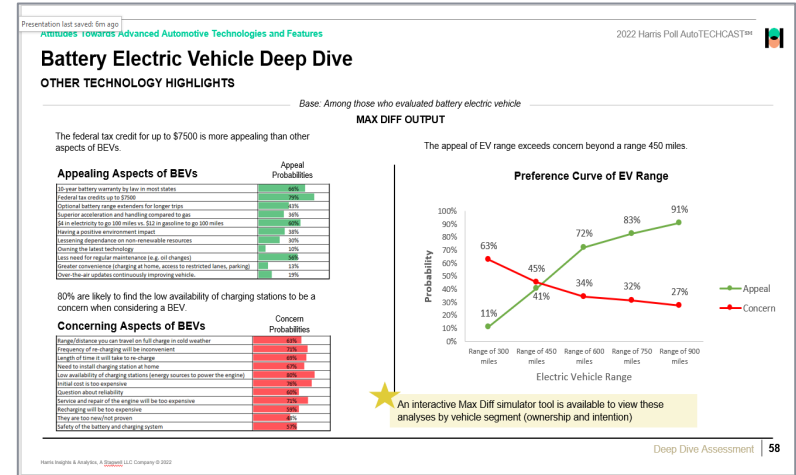
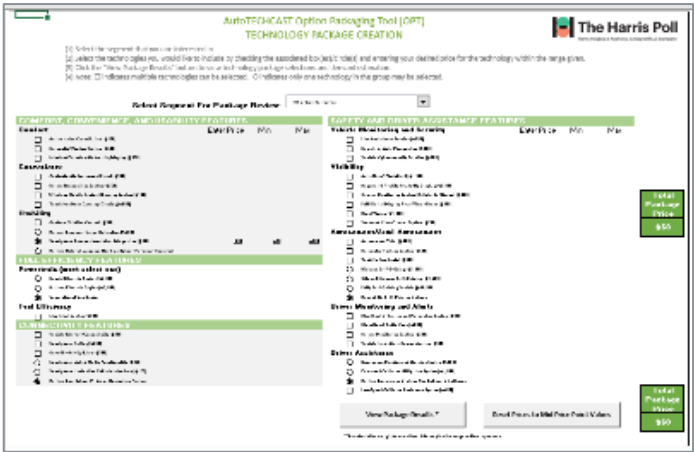
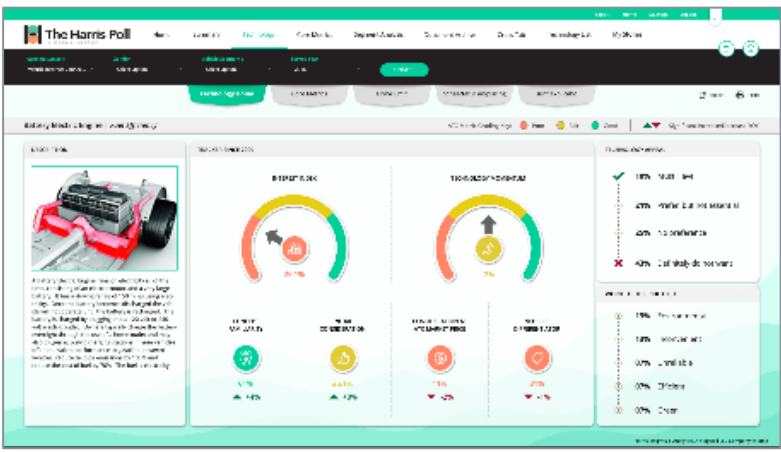
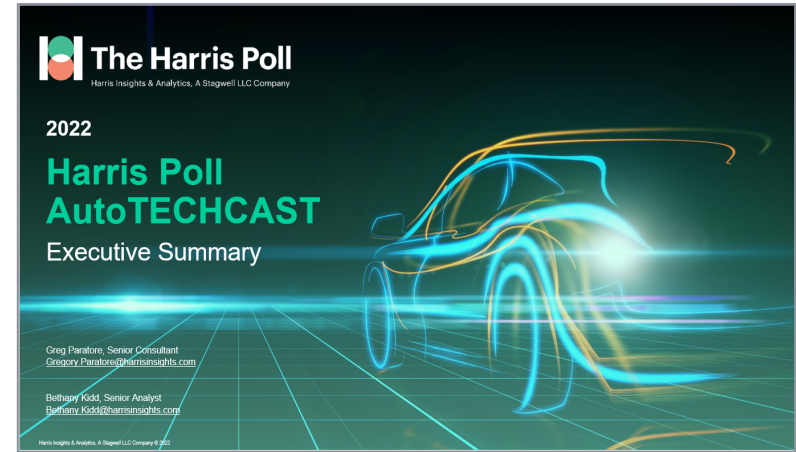


AutoTECHCAST Deliverables

Summary Report

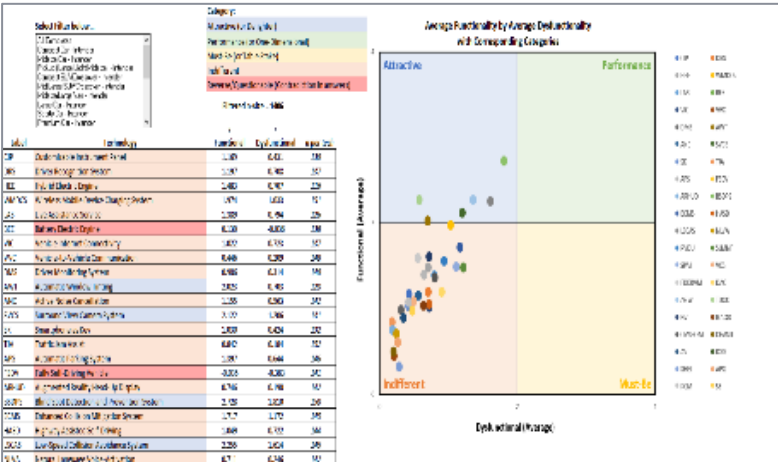
Online Interactive Dashboard

Option Packaging Tool

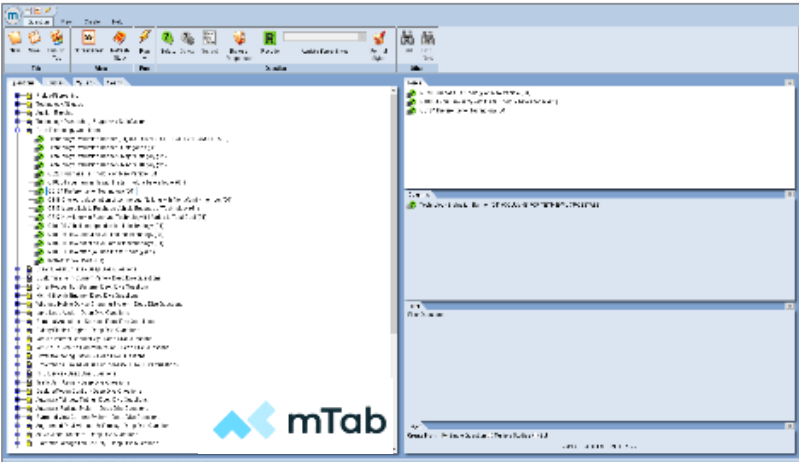


AutoTECHCAST Deliverables

KANO Analysis



Full Data Set by mTab Software



Optional AutoTECHCAST Feature Optimization Platform

