

Autonomous World: How the self-driving future will impact your industry



WHAT THE FUTURE | SPRING 2018



WTF

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MOBILITY

Will a driverless future be heaven or hell?

PAGE 06

What exactly will automated vehicles replace?

PAGE 10

When will the driverless future arrive?

PAGE 13

How would you react if your car started selling you things?

PAGE 16

Can electric vehicles thrive without automation?

PAGE 19

If cars are autonomous, what do you still want to be able to walk to?

PAGE 22

Powered by **Ipsos**



Larry Dominique,
President and CEO,
PSA North America Inc.



Matt Sweeney
Former head of
product for
Uber's Advanced
Technology Center



Alex Salkever
Co-author
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Driverless Car.”



Michelle Krebs
Executive analyst for
Autotrader, past-
president of the Society
of Automotive Analysts.



Marshall Brown
Associate professor, Illinois
Institute of Technology,
College of Architecture,
and co-principal IIT's,
Driverless City project



Robin Chase
Co-founder of the
car-sharing service
Zipcar and author
of “Peers Inc.”



Jeff Speck
City planner, urban
designer and author,
“Walkable City,” and
the forthcoming
“Walkable City Rules!”

Your panelists



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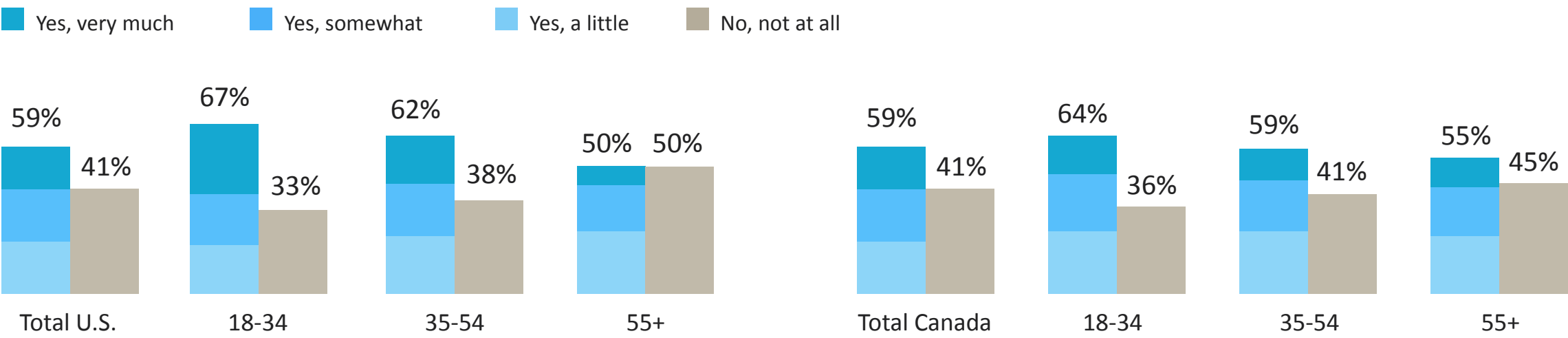


Oscar Yuan

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Americans love cars – even Millennials

Do you consider yourself a car person or someone who is passionate about cars, trucks, motorcycles, or other vehicles you drive yourself?



Source: [Ipsos surveys](#) conducted between December 19 and 21, 2017 among 2,000 adults in the U.S. And between February 23 and 26, 2018 among 1,000 adults [in Canada](#)

And we need cars (at least today)



Robin Chase

Co-founder of the car-sharing service Zipcar and author of "[Peers Inc.](#)"

"If you need a car to get to work, you will own a car, and you will therefore have all the sunk costs behind you. For every trip you make in your life, which is a huge diversity of trips, your cheapest and most convenient option will be the one sitting in your driveway."

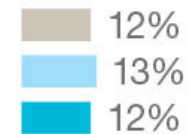
U.S.: How necessary is it for you to have a car to get to work?

■ Total ■ Car people ■ Non-car people

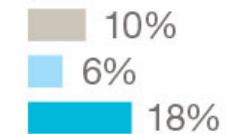
I definitely need to have a vehicle to get to work.



I could probably get to work without a vehicle if I needed to.



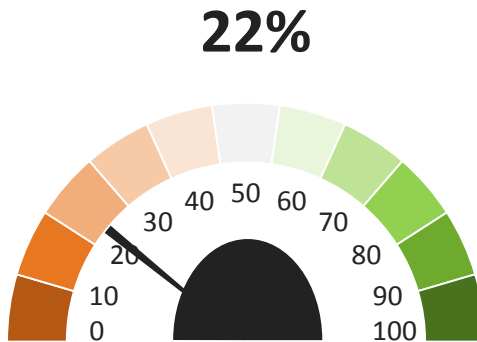
I don't need a vehicle at all to get to work.



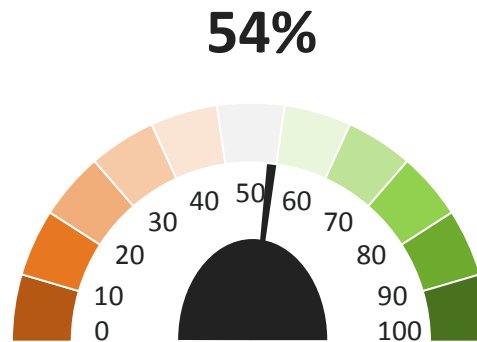
(Source: Ipsos survey conducted between December 19 and 21, 2017 among 1,100 adults employed full- or part-time)

ANTICIPATION

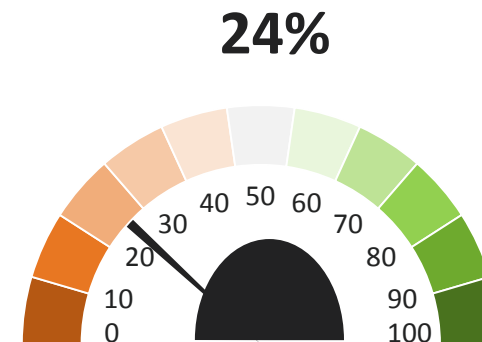
However, Americans are intrigued by a future with self-driving cars



In favor of self-driving cars



Unsure but find the idea of self-driving cars interesting



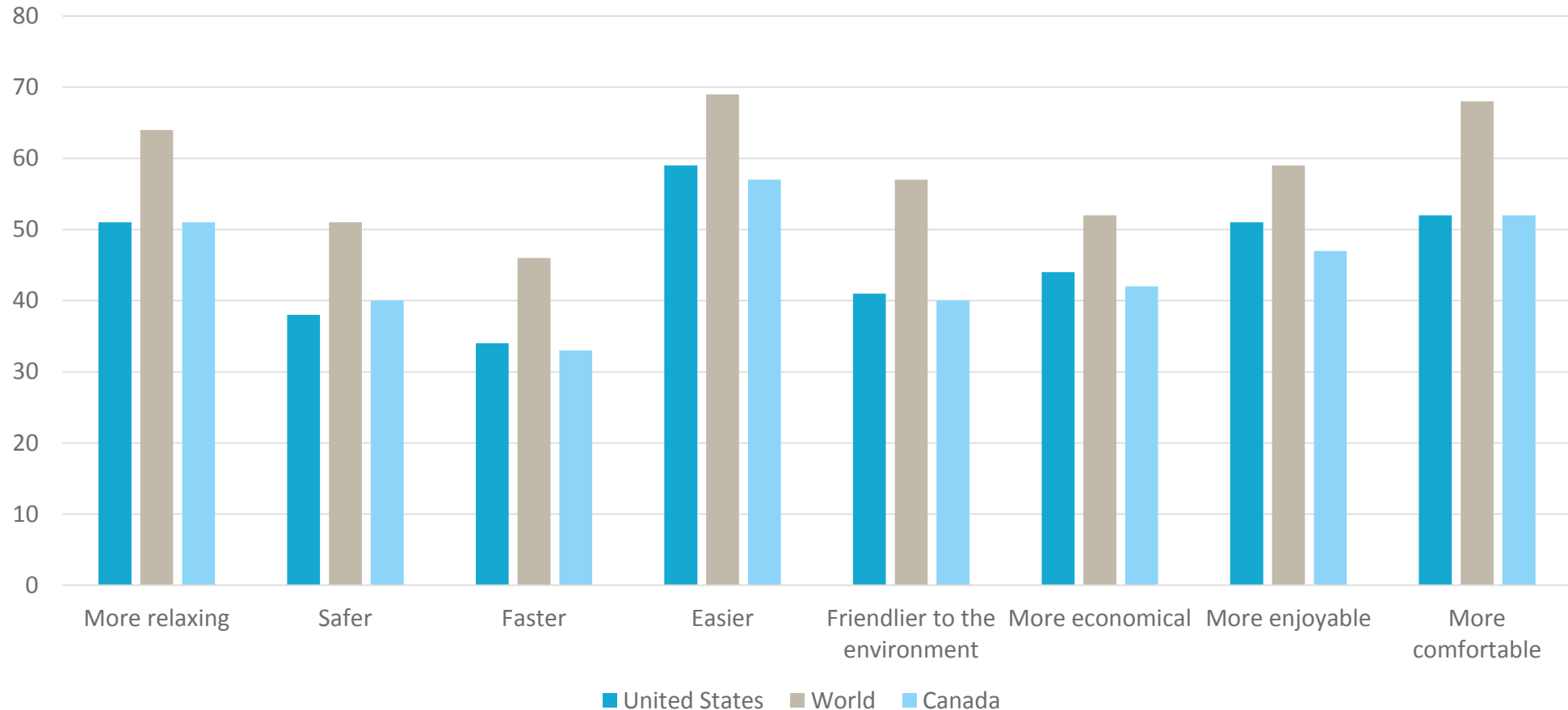
Against and would never use a self-driving car

Which of the following statements is closest to your own opinion?

- I am in favor of self-driving cars and I can't wait to use them
- I am unsure about self-driving cars, but I find the idea interesting
- I am against self-driving cars and would never use them

BENEFITS

And, we're not alone. In fact, much of the world is even more excited than we are



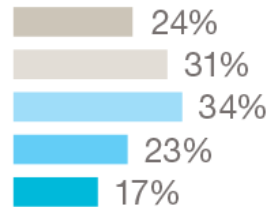
BENEFITS

Price could be a huge factor in adoption

Assuming the cost of self-driving cars is **comparable** to what it costs to your own car now, which would be your preference?

■ Total U.S. ■ Total Canada ■ 18-34 (U.S.) ■ 35-54 (U.S.) ■ 55+ (U.S.)

To switch to using a self-driving vehicle



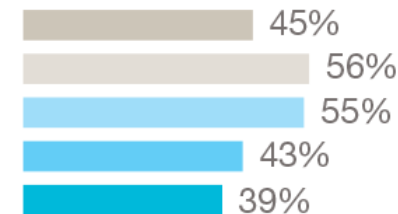
To continue using a vehicle that you personally drive



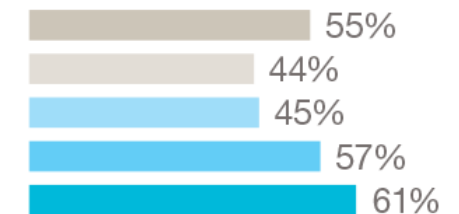
And if self-driving cars cost **much less** to own and maintain than it costs to own and maintain a car today, what would be your preference?

■ Total U.S. ■ Total Canada ■ 18-34 (U.S.) ■ 35-54 (U.S.) ■ 55+ (U.S.)

To switch to using a self-driving vehicle



To continue using a vehicle that you personally drive



Source: [Ipsos surveys](#) conducted between December 19 and 21, 2017 among 2,000 adults in the U.S. And between February 23 and 26, 2018 among 1,000 adults [in Canada](#)

READY OR NOT

Here they come

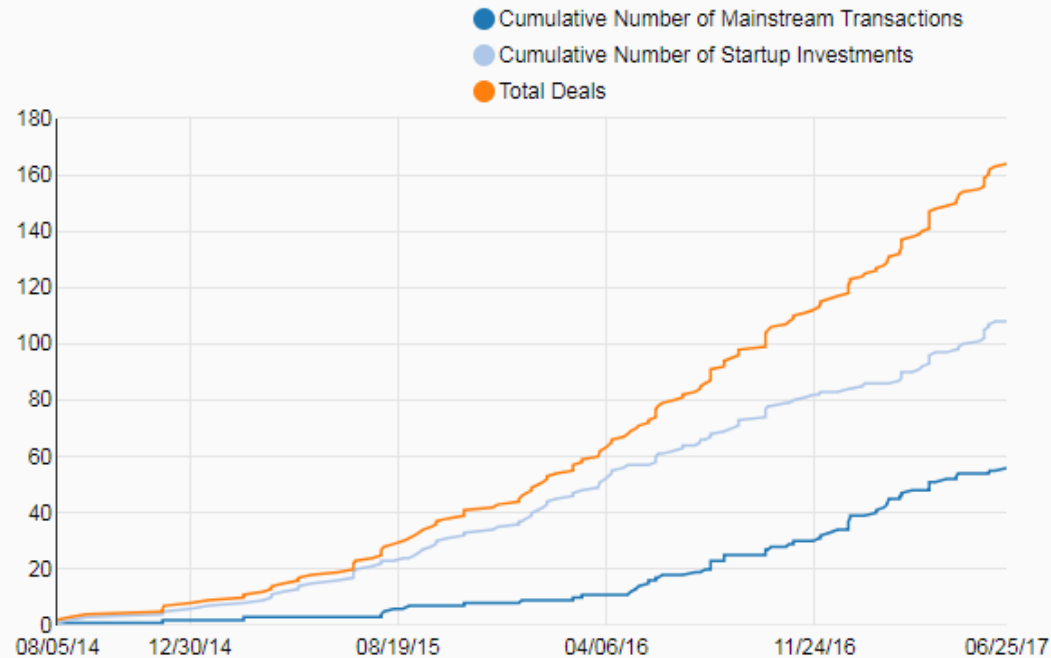


Matt Sweeney

*Former head of product
for Uber's Advanced
Technology Center*

“The usual fallacy in tech is you think that it’s coming way sooner than it is and then you underestimate its overall impact.”

Cumulative Number of Driverless Car Investments



Source: The Brookings Institution

BROOKINGS

READY OR NOT

Some of the impacted industries...

Auto	Financial Services	Food/ Beverage	Retail	Hospitality
Media	Housing/ Real estate	CPG	Healthcare	Government

READY OR NOT

Today we'll focus in on three key industries

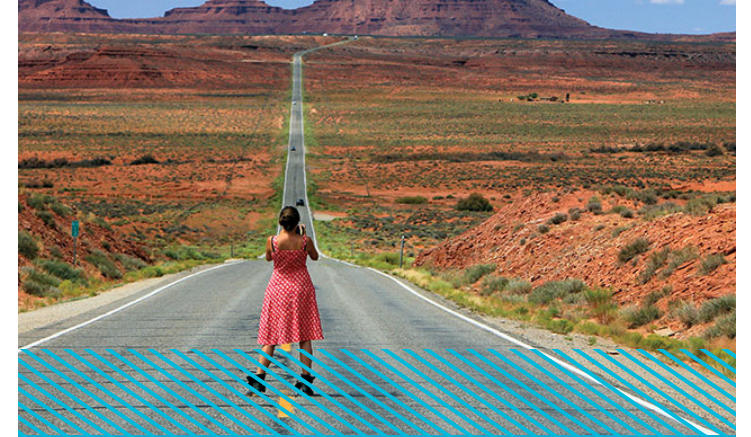
FOOD AND BEVERAGE



HOUSING AND REAL ESTATE




HOSPITALITY





FOOD AND BEVERAGE

WHAT THE FUTURE: Quick Serve Restaurants



IMPLICATIONS FOR:

- Product development
- Store location
- Service Delivery
- Marketing
- Operations

WHAT THE FUTURE Food manufacturing

IMPLICATIONS FOR:

- Packaging
- Distribution
- Sales Channels
- Product Innovation

WHAT THE FUTURE Food Delivery



IMPLICATIONS FOR:
OEM vehicle development

Store location

Frozen food/prepared
meals

Subscription food
services/grocery



WHAT THE FUTURE Alcoholic beverages

IMPLICATIONS FOR:
Consumption Patterns
Volumes
On-Premise/Off-Premise
Consumption
Packaging



HOSPITALITY

WHAT THE FUTURE Hospitality



IMPLICATIONS FOR:

Location

Occupancy
Levels

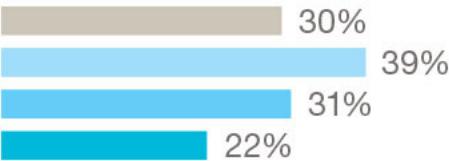
Type of
Services Offered

Millennials especially would take more roadtrips

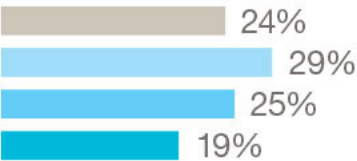
If you had regular access to a self-driving car, rather than having to drive yourself, would you:

■ Total U.S. ■ 18-34 ■ 35-54 ■ 55+

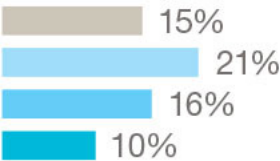
Take more road trips



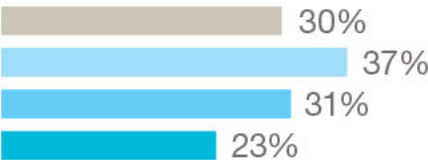
Take a different/more scenic route



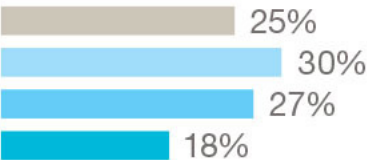
Stop at more places along the way



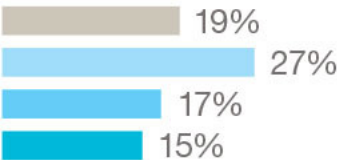
Travel longer distances by vehicle, instead of flying



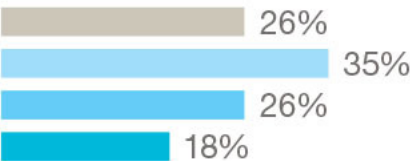
Go to different places than if you had to drive yourself



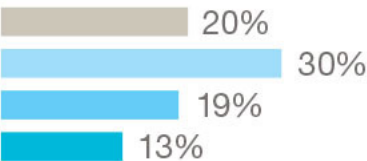
Change what time of day you plan to travel



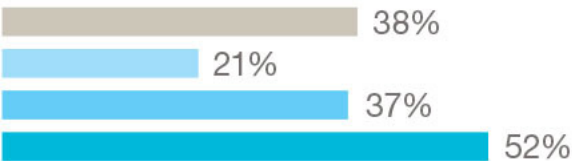
Travel with different types of entertainment other than just the radio



Go to more events/destinations than you do now



None of these



WHAT THE FUTURE Airlines



IMPLICATIONS FOR:

Routes

Pricing

**Type of
Services Offered**



HOUSING

WHAT THE FUTURE

Home design and architecture

IMPLICATIONS FOR:

**Layouts and
room features**

**Renovations of garage
space/driveways**

**Storage of packaged
goods and other
products**

WHAT THE FUTURE Real estate

IMPLICATIONS FOR:

New developments

Locations

Pricing

Urban/Suburban

Space needs





WHAT THE FUTURE Government

IMPLICATIONS FOR:

City planning

Infrastructure

Public Transport

Laws/Regulations

WHAT THE FUTURE Retail

IMPLICATIONS FOR:

Delivery

CPG/grocery

Malls and strip malls

Logistics



WHAT THE FUTURE

Whatever your industry it's time to start asking the big questions. And asking WTFuture


What autonomous vehicles would mean for:

 **Customer loyalty**

Will traditional car manufacturers let go of old vehicle ownership structures and embrace new models and partnerships? Or will they be outplayed by the newcomers?

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What autonomous vehicles would mean for:

 **MAdTech**

Your autonomous vehicle will become an advertising medium unto itself. How will marketers both utilize all that new data and break through the clutter of in-car ads?

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What autonomous vehicles would mean for:

 **Beauty**

What if your car replaced the bathroom vanity as the place you complete your morning routine?

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What autonomous vehicles would mean for:

 **Commercial insurance**

Who will absorb the risk in self-driving cars: the fleet operators, the OEMs, or maybe the software developers?

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What autonomous vehicles would mean for:

 **Auto financing**

If mobility moves more from ownership to a sharing model, will banks and others start to finance the subscription costs?

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What autonomous vehicles would mean for:

 **Car manufacturers**

Will people continue to own their own cars, move to a more subscription-based fleet ownership, or some combination of both?

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What autonomous vehicles would mean for:

 **Auto insurance**

What would personal auto insurance look like if people share a car rather than own it outright?

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What autonomous vehicles would mean for:

 **Commercial and residential real estate**

Could the arrival of autonomous cars mean we're willing to commute longer distances and therefore reverse the urbanization trend?

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Thank you! Questions?



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WTF

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