

More Owners Indicate Their Intent to Install ADAS and Connectivity Features on Their Next New Vehicle, J.D. Power Finds

Security Risk of Vehicle Systems due to Connectivity is of Increasing Concern

TOKYO: 29 Nov. 2019 – Advanced driver assistance systems (ADAS) have been more frequently installed on new vehicles over the past two years, according to the J.D. Power Inaugural Japan Tech Experience Index (TXI) StudySM, released today.

“The study finds again that the installations of ADAS and connectivity features, on which auto manufacturers have focused, as well as owners’ interests in these systems and features, have increased,” said **Atsushi Kawahashi, Senior Director of the Automotive Division at J.D. Power**. “On other hand, users have started to feel anxious, something they have never felt before, that the connectivity features might pose a security risk to the vehicle systems. Now, a crucial issue for auto manufacturers is to provide a product and service environment, in which they can increase the “trust” of advanced technologies, by properly meeting consumers’ needs for ADAS and connectivity features and having them use these systems and features.”

Following are some of the key findings of the study:

- **More ADAS have been installed on new vehicles:** The study examines installations of 35 features on new vehicles and the owners’ intent to install these features on their next new vehicle. The study finds that ADAS, whose purpose is for security and safety, have been more frequently installed on new vehicles at an increasingly rapid rate since 2017.
- **Lane-keeping systems have been the most frequently installed:** Among the 35 features, the largest increase in installations is for lane departure warning systems (lane keep assist systems), 74% in 2019, up 23 percent points from 51% in 2017. Blind-spot monitoring/warning systems (50%, up 15 percentage points) and low-speed collision mitigation braking systems (63%, up 14 percentage points) follow.
- **Owners’ Intent to install connectivity has increased:** The study finds that owners have become more interested in connectivity/communication service features for their next new vehicle. More than a half of owners (53%) indicate that they would install smartphone/mobile phone pairing with the in-vehicle system on their new vehicles. The same percentage is indicated for hands-free phone systems. These percentages have increased by 11 percentage points from 42% in 2017. The second largest increase in interest is for in-vehicle apps/integration functions for navigation apps, 58% in 2019, up 10 percentage points from 2017.
- **Installation intent of advanced features differs depend on the age group:** According to the study, younger owners show higher intent to install communication service or connectivity features, compared with the older age group who indicate higher intent for ADAS for security and safety.
- **Users are concerned about security risk:** The study also asks about possible increasing security risks, including hacking, due to the integration of in-vehicle technologies and systems. Over half of the owners (55%) indicate that they are highly or somewhat concerned, up 14 percentage points from 41% in 2018. This high percentage is primarily driven by smartphone-linked remote control or smartphone mirroring users. This concern is expected to become higher as more vehicle systems or in-vehicle functions are connected to Internet.

The inaugural Japan Tech Experience Index Study examines installations and usage of advanced technologies on new vehicles and the owners' intents concerning these technologies among new-vehicles purchasers after five to 12 months of ownership. The study is based on 4,194 respondents and was fielded online in August 2019.

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Media Relations Contacts

Kumi Kitami; Tokyo; 81-3-4570-8410; release@jdpa.com

Geno Effler; Costa Mesa, Calif.; 714-621-6224; media.relations@jdpa.com

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