



KPMG's 19th consecutive

Global Automotive Executive Survey 2018

In every industry there is a 'next' –
See it sooner with KPMG

www.kpmg.com/GAES



Charles Krieck

**Chairman
KPMG in Brazil**

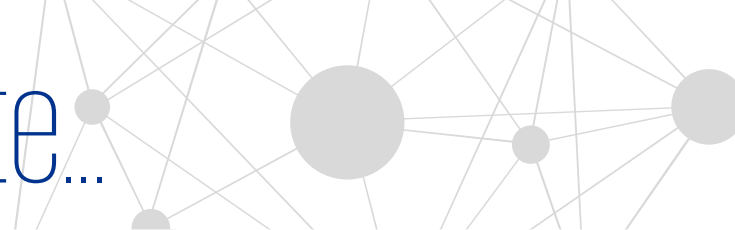


Ricardo BACELLAR

**Head of Automotive
KPMG in Brazil**



We have what to celebrate...



ISTOE Dinheiro

EDIÇÃO Nº 1055 02.02



ÚLTIMAS REVISTA TV DINHEIRO ECONOMIA NEGÓCIOS MERCADO DIGITAL FINANÇAS INVESTIDOR ESTILO BLOGS ÍNDICES



Entrevista

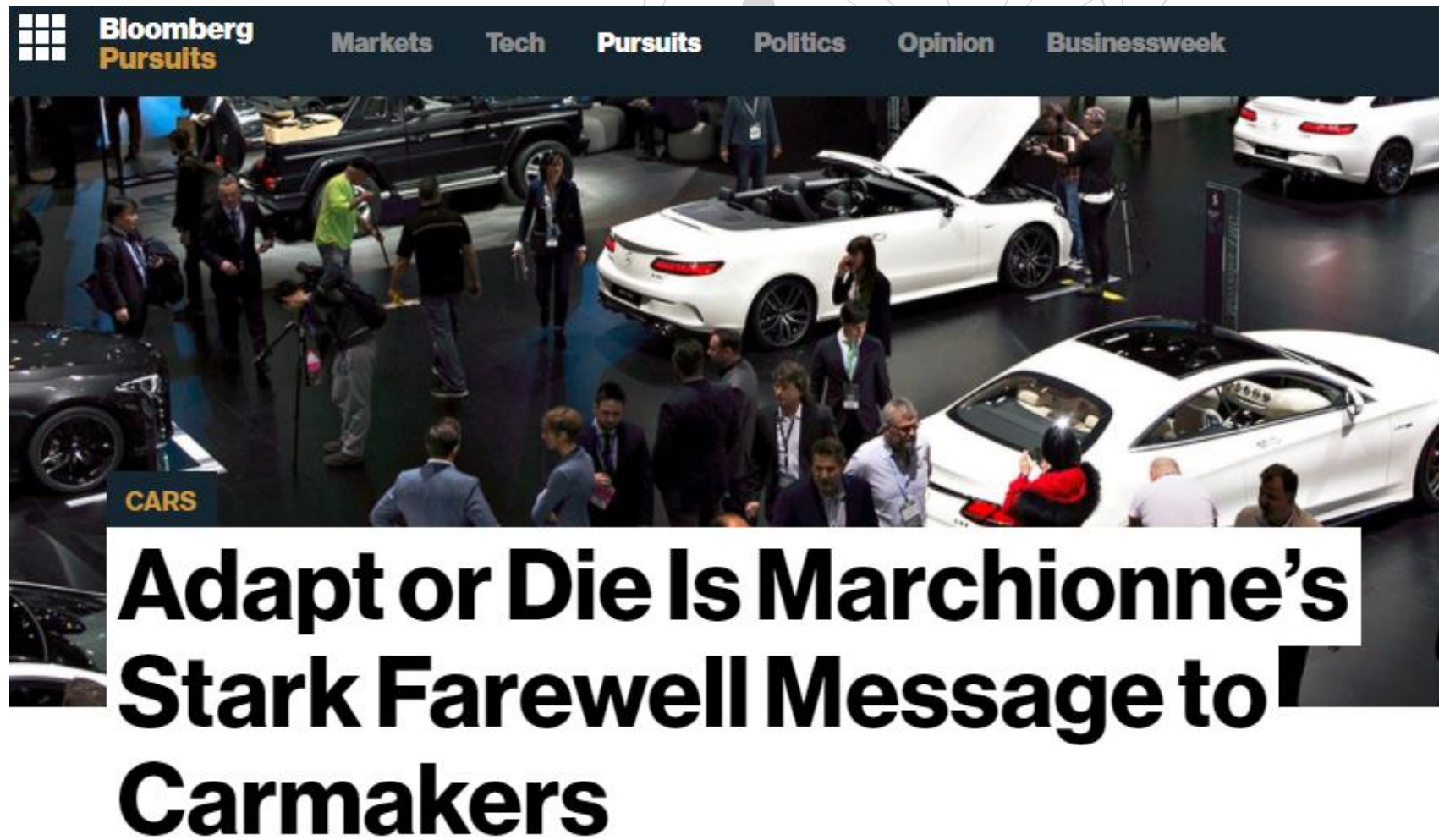


ANTONIO MEGALE, PRESIDENTE DA ANFAVEA


Começamos 2018 com um crescimento de 23%

Gabriel Reis

... But there's much more to be done!



... But there's much more to be done!

A stylized illustration of a city skyline at night. In the foreground, a large digital billboard with a green frame and a black display area shows the text "What will the future mobility ecosystem look like?" in glowing yellow pixelated font. The billboard is decorated with horizontal bands of green, yellow, and white. Below the billboard, a city skyline is visible with various buildings, some with lit windows, and a few colorful lines (pink, blue, green) extending from the bottom left towards the city. The sky is dark blue with a few clouds.

What will the future
mobility ecosystem
look like?

... But there's much more to be done!



But there's much more to be done!

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AI And Automotive Future Is Here

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AW

Automotive World

Home > Analysis > The cockpit of the future: intelligent, powerful and feature-rich

The cockpit of the future: intelligent, powerful and feature-rich

January 3, 2018

Michael Nash talks to Marques McCammon of Wind River about imminent changes and technological developments in vehicle cabins

Picture the car of the future and the words 'autonomous' and 'connected' spring instantly to

WS

NEWS

FEATURES

BUYER'S GUIDE

Ads on Automotive



CULTURE

CARS

REVIEWS

LONGFORM

ash advertising on self-driving cars

4:22pm EST

THE DRIVE

NEW CARS

Advertiser's Info

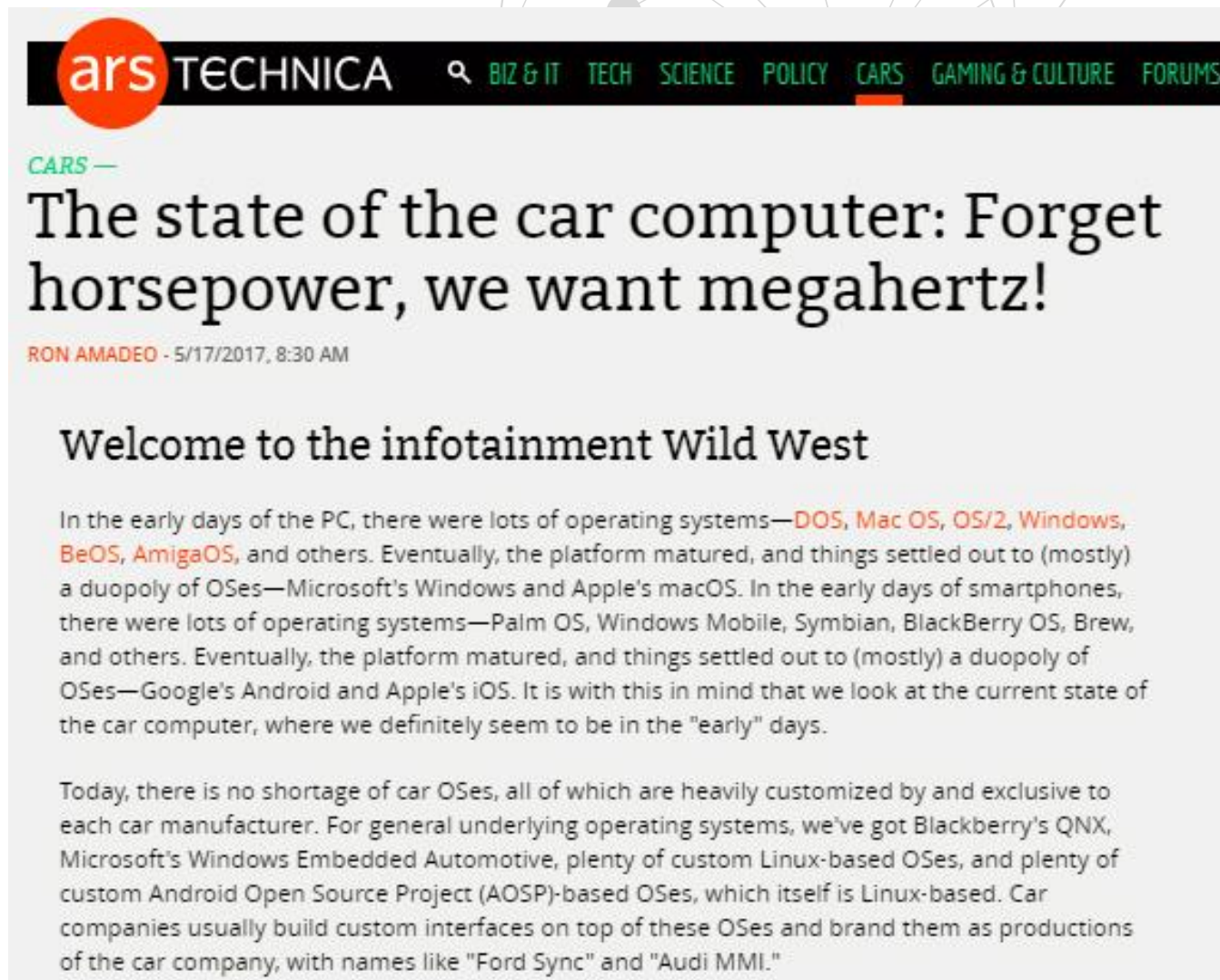
Companies will soon be

KPMG

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Note: Percentages may not add up to 100 % due to rounding | Source: KPMG's Global Automotive Executive Survey 2017

But there's much more to be done!



The screenshot shows the top of an Ars Technica article. The navigation bar includes links for BIZ & IT, TECH, SCIENCE, POLICY, CARS (which is highlighted), GAMING & CULTURE, and FORUMS. The article title is 'The state of the car computer: Forget horsepower, we want megahertz!' and the author is Ron Amadeo, dated 5/17/2017, 8:30 AM. The sub-header is 'Welcome to the infotainment Wild West'. The first paragraph discusses the evolution of operating systems from the early PC days to the current state of the car computer. The second paragraph discusses the current state of car OSes, noting that there is no shortage and they are heavily customized by each car manufacturer.

ars TECHNICA 🔍 BIZ & IT TECH SCIENCE POLICY **CARS** GAMING & CULTURE FORUMS

CARS —

The state of the car computer: Forget horsepower, we want megahertz!

RON AMADEO · 5/17/2017, 8:30 AM

Welcome to the infotainment Wild West

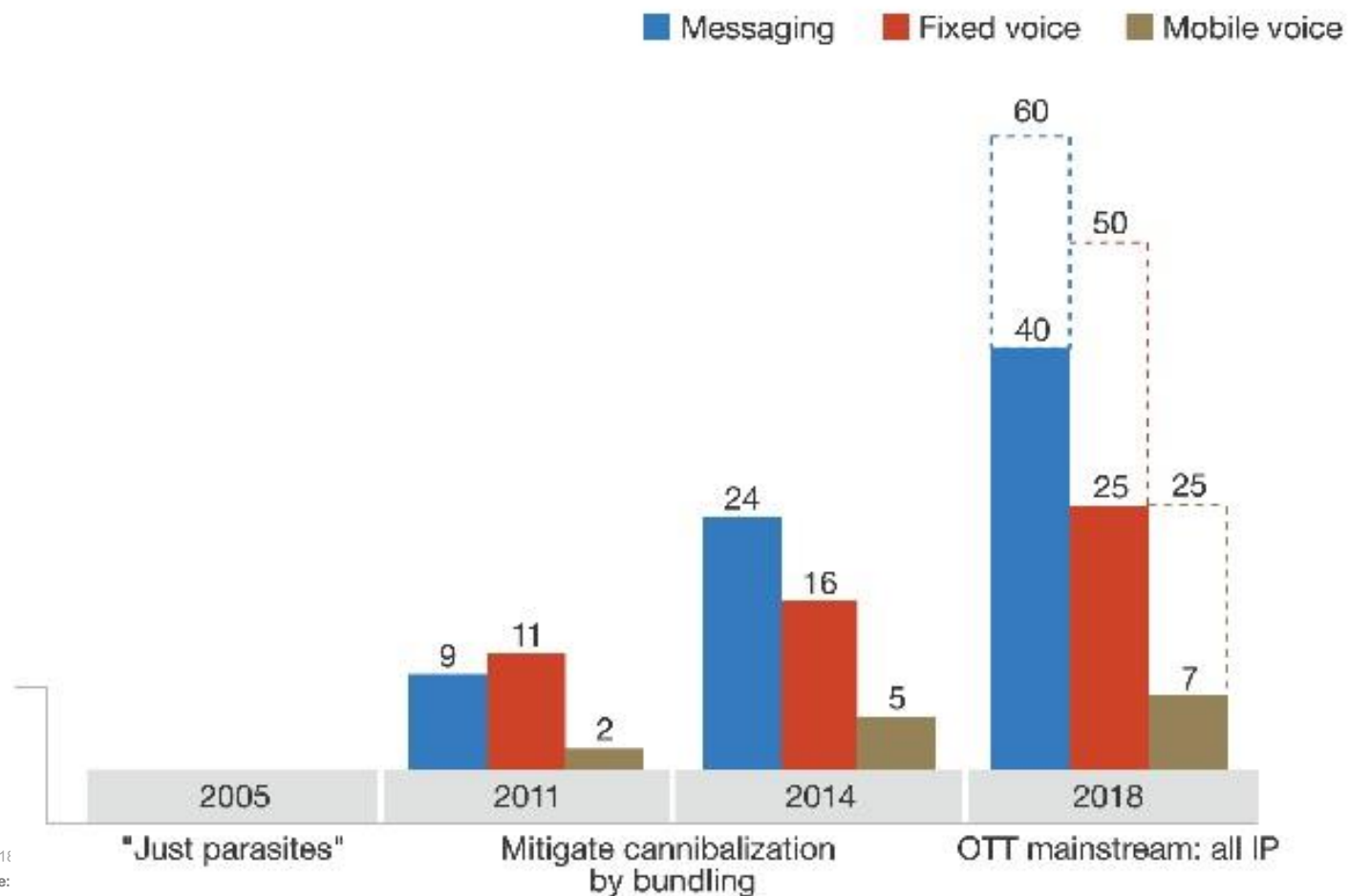
In the early days of the PC, there were lots of operating systems—DOS, Mac OS, OS/2, Windows, BeOS, AmigaOS, and others. Eventually, the platform matured, and things settled out to (mostly) a duopoly of OSes—Microsoft's Windows and Apple's macOS. In the early days of smartphones, there were lots of operating systems—Palm OS, Windows Mobile, Symbian, BlackBerry OS, Brew, and others. Eventually, the platform matured, and things settled out to (mostly) a duopoly of OSes—Google's Android and Apple's iOS. It is with this in mind that we look at the current state of the car computer, where we definitely seem to be in the "early" days.

Today, there is no shortage of car OSes, all of which are heavily customized by and exclusive to each car manufacturer. For general underlying operating systems, we've got Blackberry's QNX, Microsoft's Windows Embedded Automotive, plenty of custom Linux-based OSes, and plenty of custom Android Open Source Project (AOSP)-based OSes, which itself is Linux-based. Car companies usually build custom interfaces on top of these OSes and brand them as productions of the car company, with names like "Ford Sync" and "Audi MMI."

to be done!

OTT's share of traditional telco services will dramatically increase by 2018.

Over-the-top (OTT) revenue cannibalization, relevant revenue, %



But there's much more to be done!



... But there's much more to be done!



John **orders lunch** for pick-up through his **in-car app**

But there's much more to be done!

≡ **EXAME** ↗ Revista EXAME WhatsApp Bolsonaro Agronegócio EXAME 50 Anos Clube

NEGÓCIOS

Acionistas fecham acordo para vender Sem Parar por R\$ 4 bi

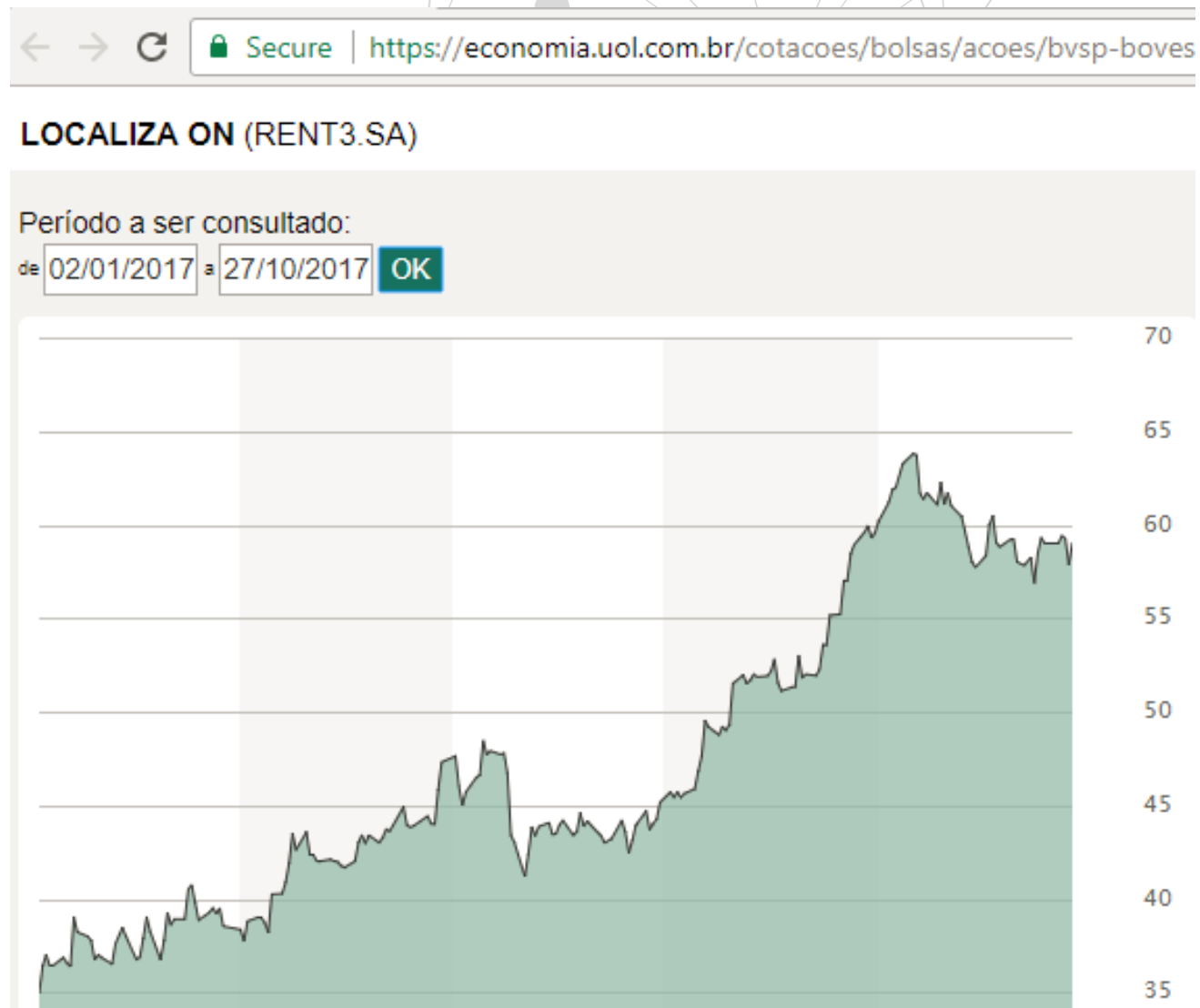
Todos os acionistas da STP teriam chegado a um acordo para vender 100% do negócio

Por **Mônica Scaramuzzo**

🕒 5 mar 2016, 09h36



But there's much more to be done!



But there's much more to be done!

REUTERS World Business Markets Politics TV

#DEALS

OCTOBER 12, 2017 / 9:23 AM / 4 MONTHS AGO

Shell buys NewMotion charging network in first electric vehicle deal



REUTERS World Business Markets Politics TV

#TECHNOLOGY NEWS

JANUARY 30, 2018 / 8:17 AM / 2 DAYS AGO

BP invests \$5 million in FreeWire in electric vehicle move



But there's much more to be done!



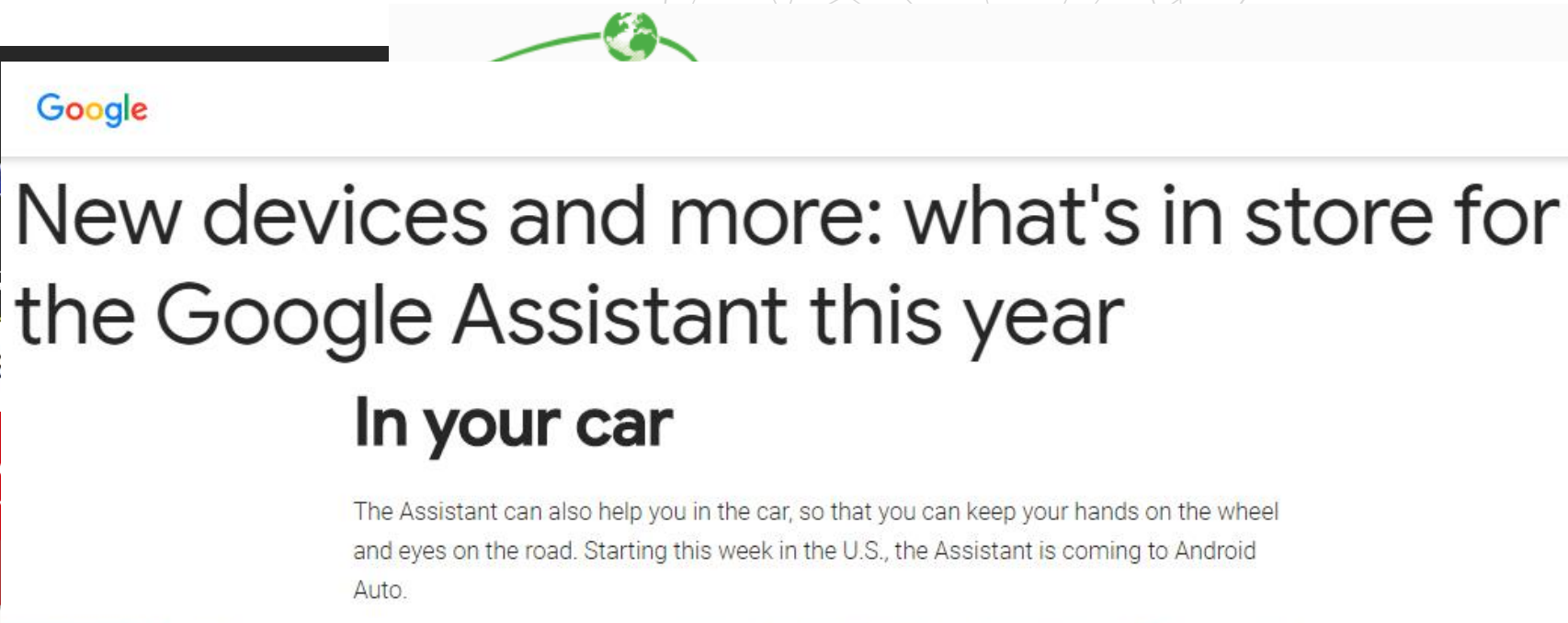
How Artificial

The Detroit

HOME NEWS SPORTS

Testing of a

Nora Naughton, The Detroit



The image shows a Google search result for the article 'New devices and more: what's in store for the Google Assistant this year'. The sub-headline is 'In your car'. The text below the headline states: 'The Assistant can also help you in the car, so that you can keep your hands on the wheel and eyes on the road. Starting this week in the U.S., the Assistant is coming to Android Auto.' The background of the article preview is a photograph of a car's interior, showing a hand on the steering wheel and a central infotainment screen displaying a Google Assistant interface with a map and a list of tasks.

New devices and more: what's in store for the Google Assistant this year

In your car

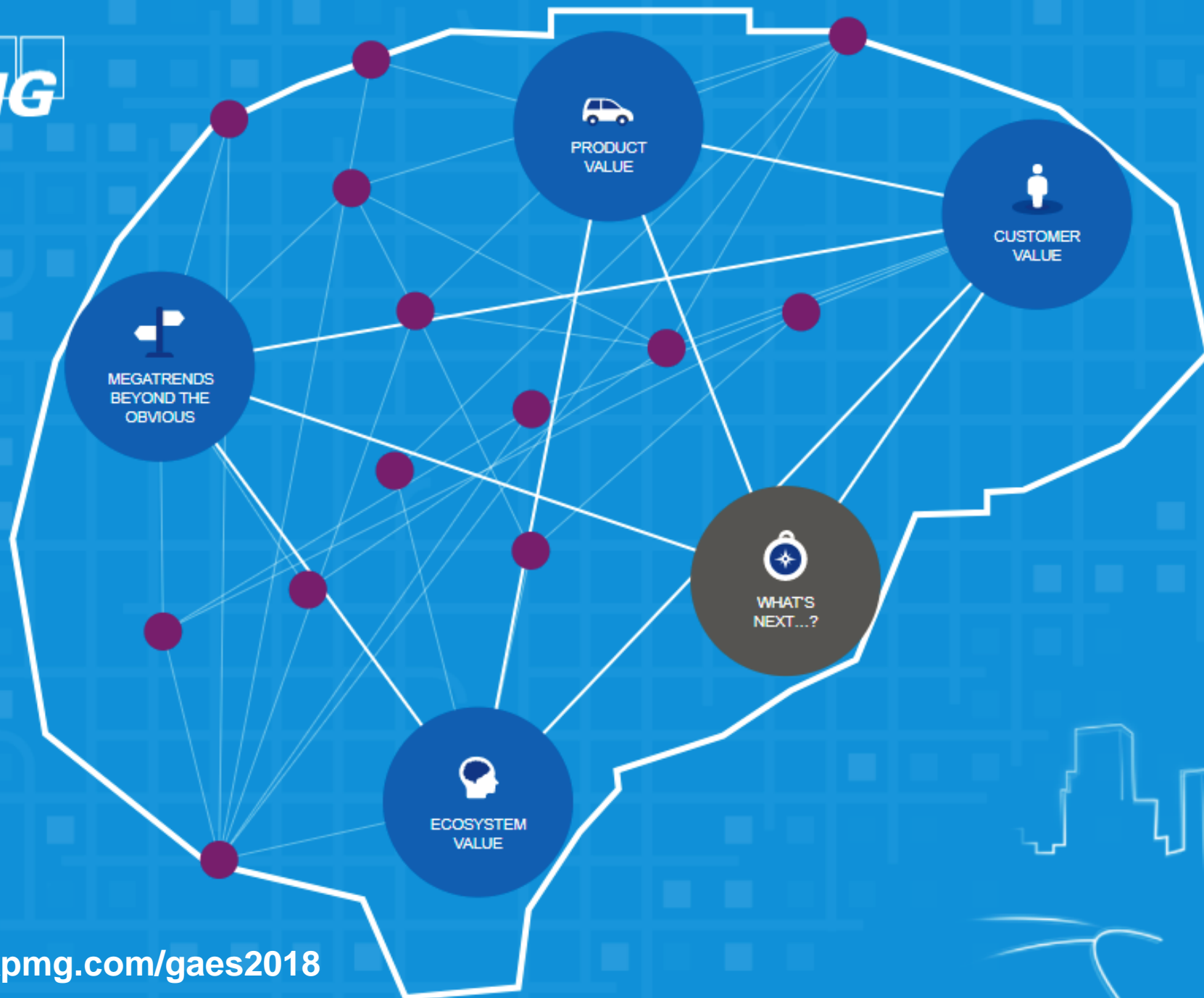
The Assistant can also help you in the car, so that you can keep your hands on the wheel and eyes on the road. Starting this week in the U.S., the Assistant is coming to Android Auto.

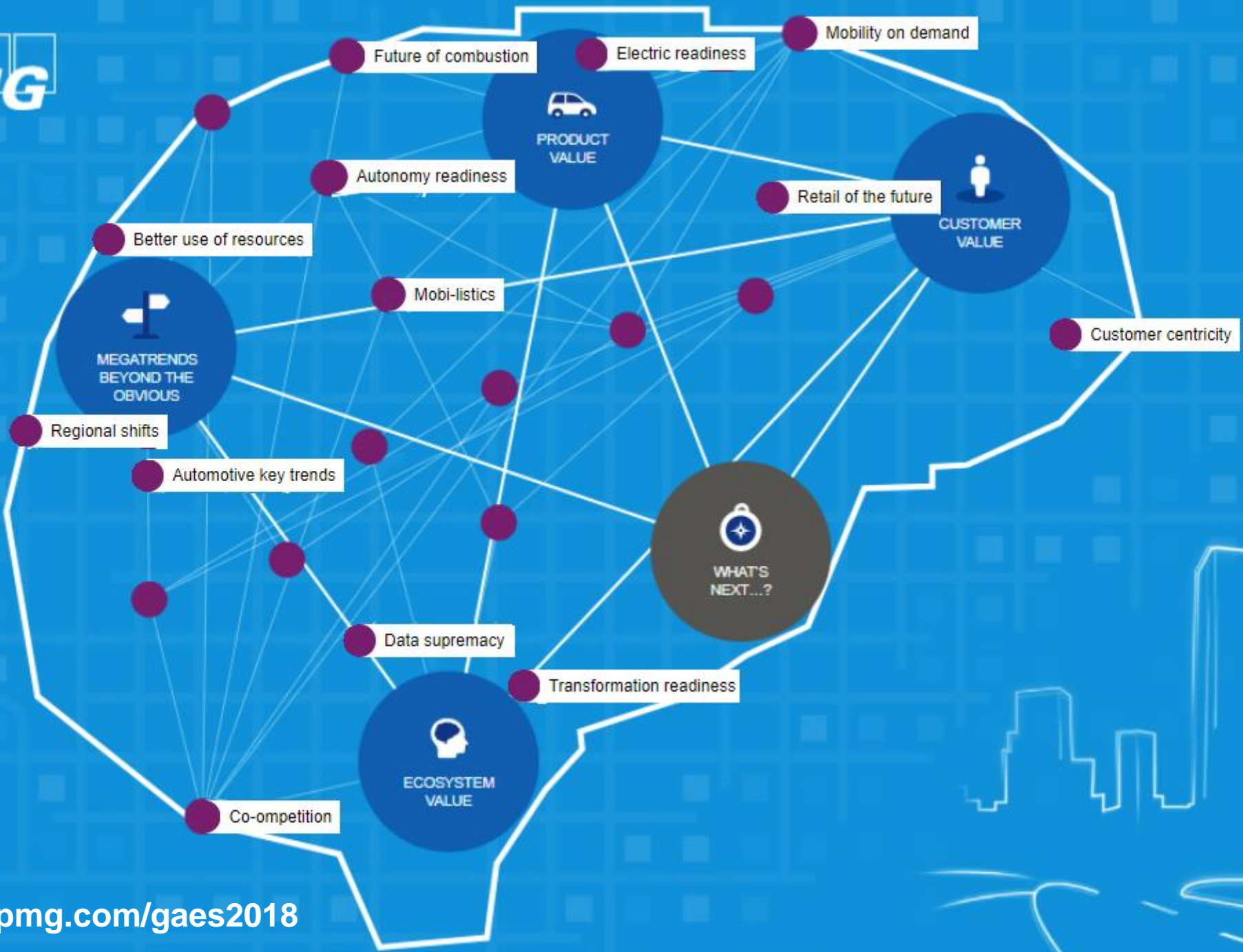
Research

on added to

focused toward the impact
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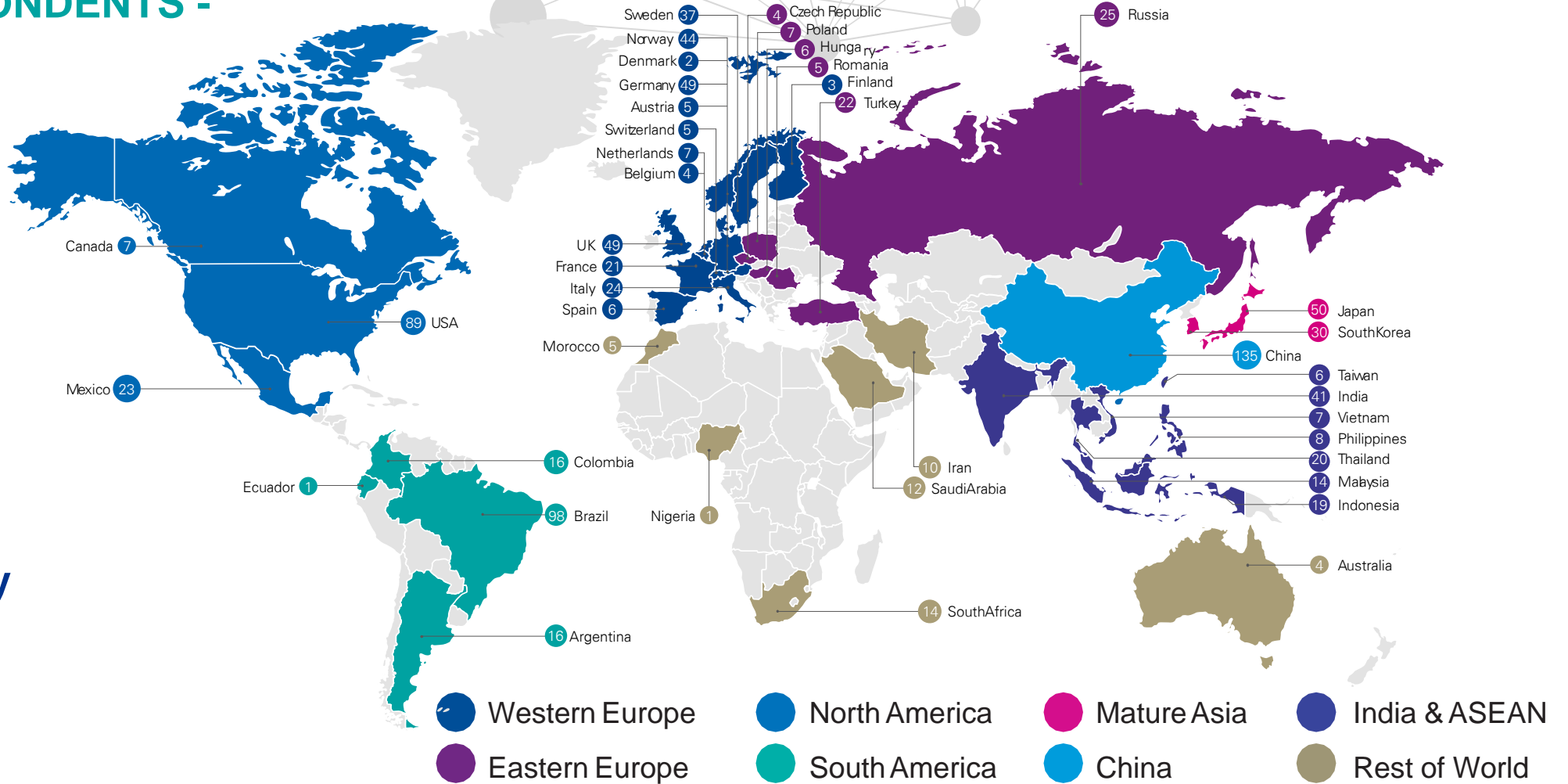




About the executive survey

For the 2018 survey we gathered the opinions of more than **900 executives** from **43 countries**.

TOP 5 RESPONDENTS - EXECUTIVES



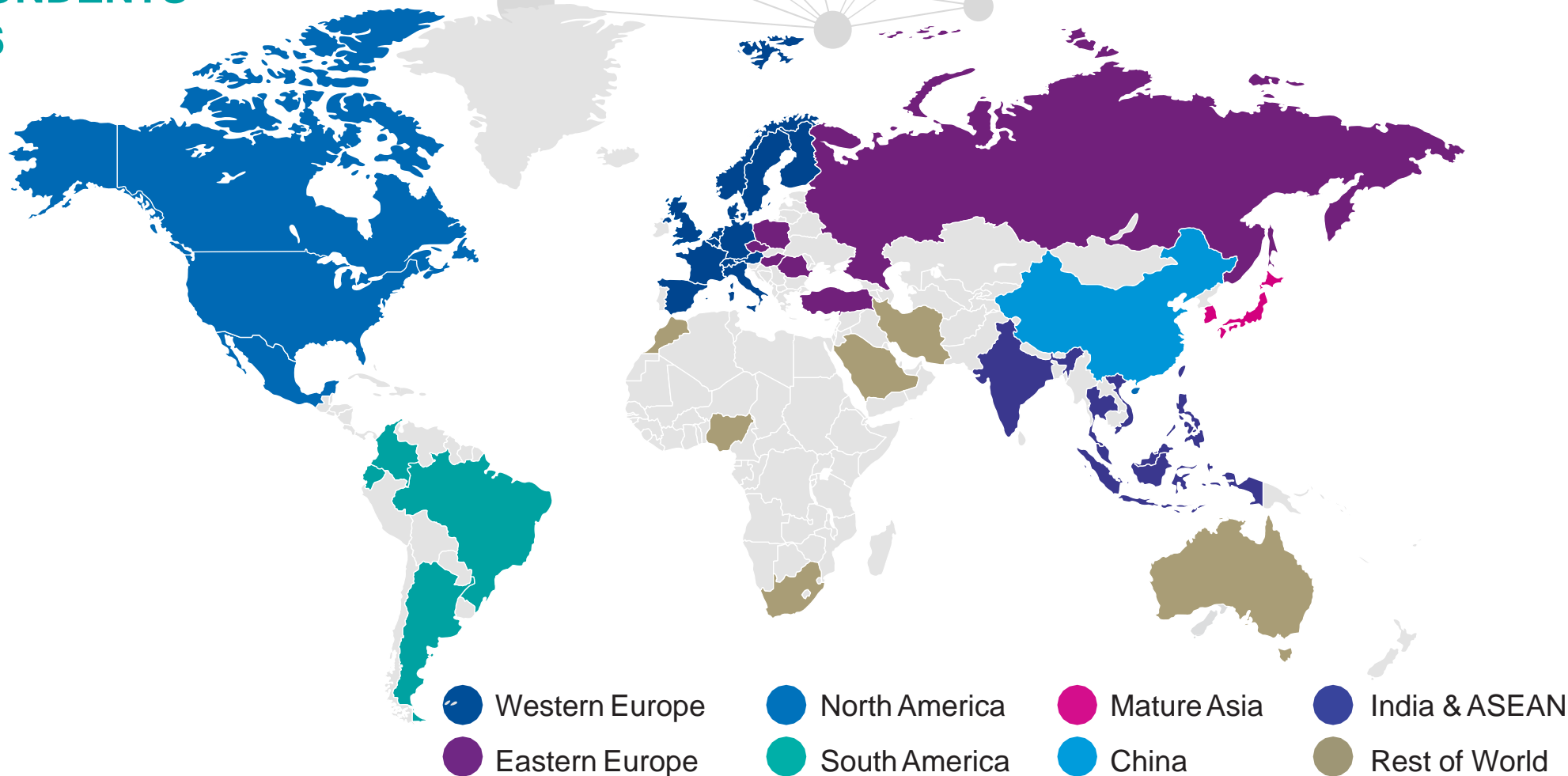
Note: Map shows number of respondents from each country | **Source:** KPMG's Global Automotive Executive Survey 2017

About the executive survey

For the 2018 survey we gathered the opinions of **2,154 consumers** from 42 countries.

TOP 5 RESPONDENTS - CONSUMERS

- 251 China
- 182 USA
- 143 Japan
- 113 Brazil
- 108 Sweden

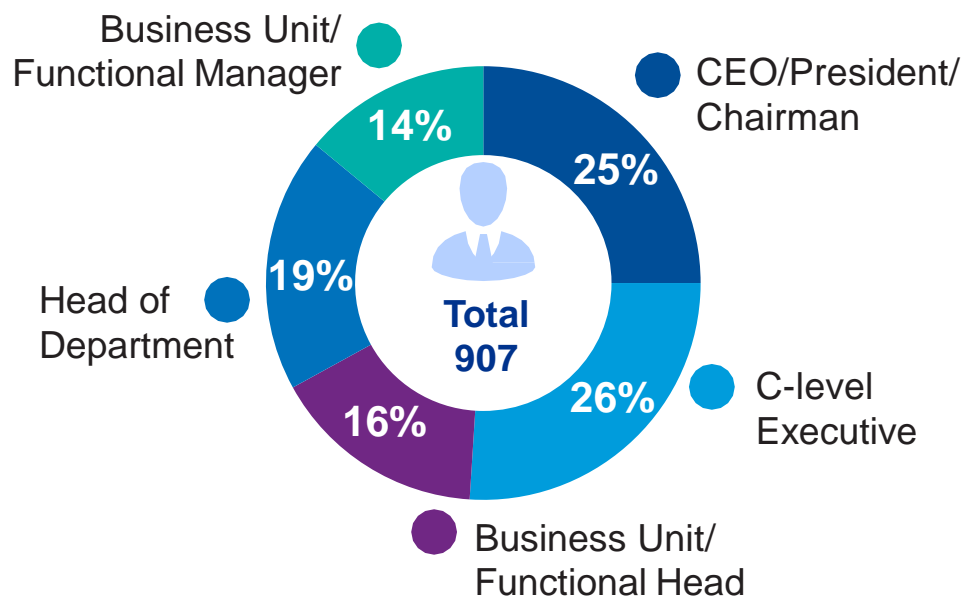


Note: Map shows number of respondents from each country | **Source:** KPMG's Global Automotive Executive Survey 2017

About the executive survey

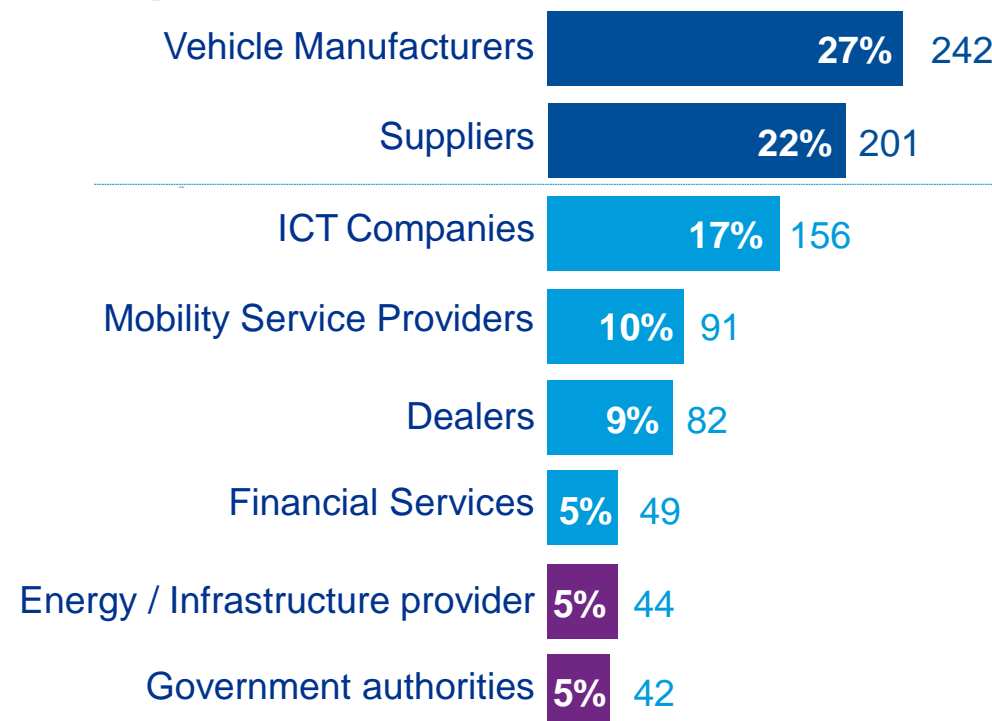


Respondents by job title



Note: Percentages may not add up to 100 % due to rounding,
ICT = Information, Communication and Technology

Respondents by company type

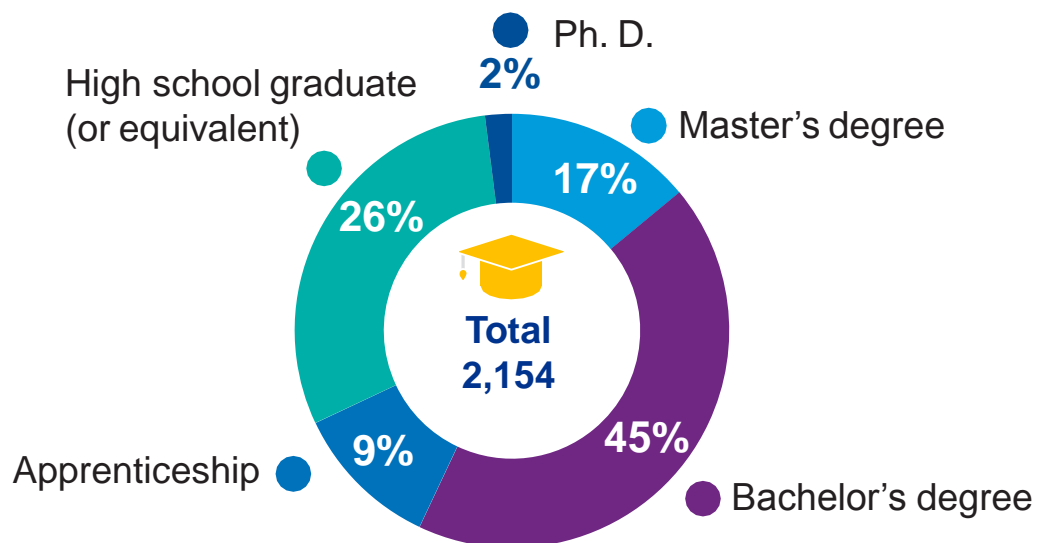


- Upstream (product-driven)
- Downstream (service-driven)
- Surrounding Player

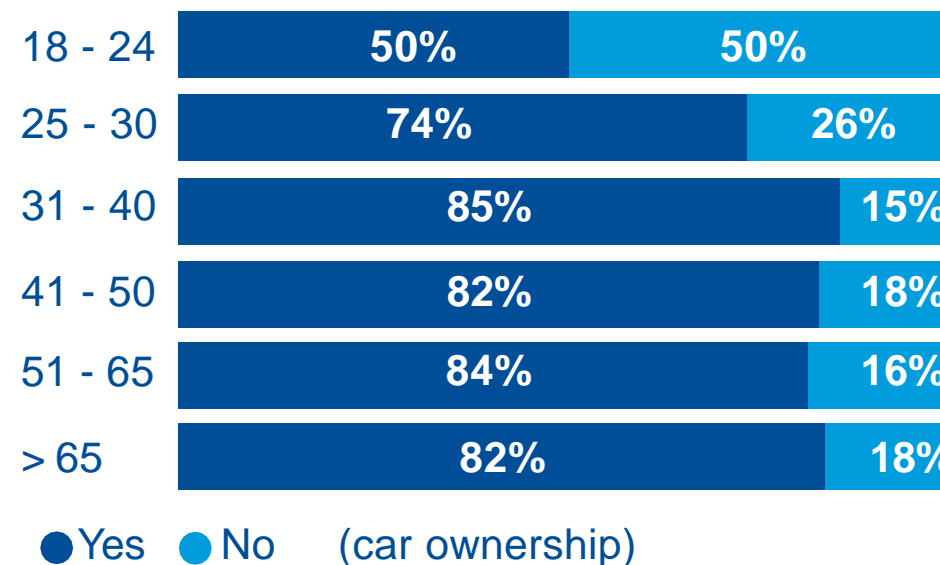
About the executive survey



Respondents by education level



Respondents by age and car ownership





Agenda

Key trends & Powertrain Technology

Business Ecosystem Transformation

Business Ecosystem Transformation: Tax & Finance

Coffee-break

Three Core Elements for New Clockspeeds: Panel

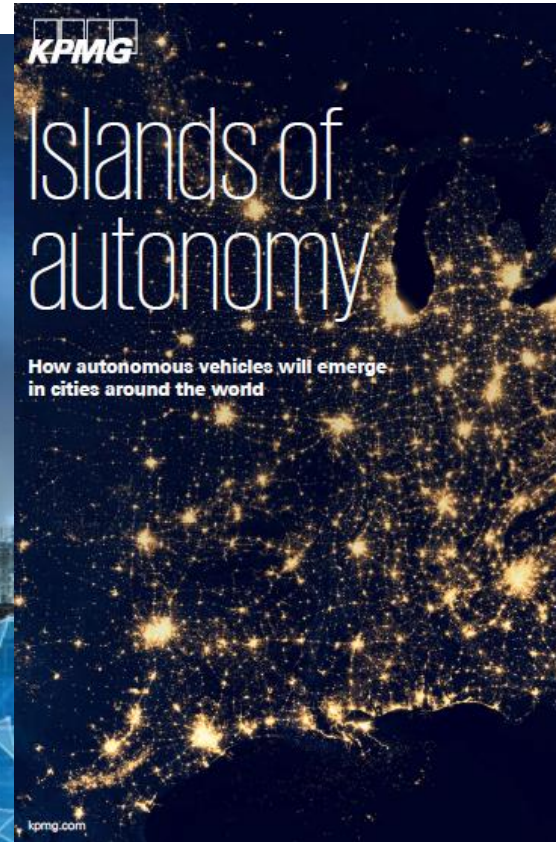
- Data Analytics
- AI & Digital Tools
- Cyber Security

Questions / Closing

Publicações



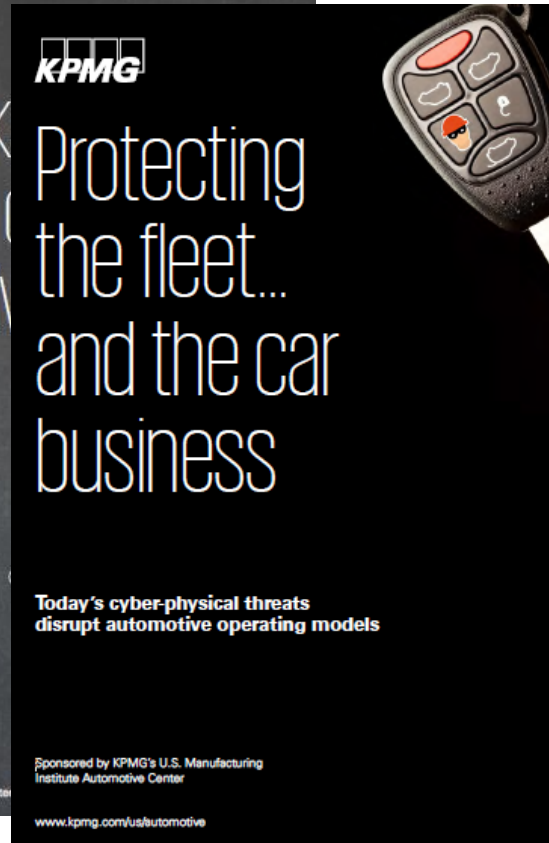
Publicações



Publicações



Publicações



Publicações



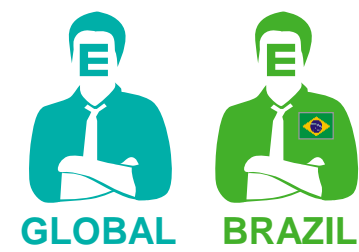
Gift

QR Code para
acesso ao
Global Automotive
Executive Survey



Transformation readiness

If companies don't have a structured approach to integrate or cooperate with innovative startups, major auto companies will fail.



Thank you

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