



KPMG's 19<sup>th</sup> consecutive

# Global Automotive Executive Survey 2018

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

[www.kpmg.com/GAES](http://www.kpmg.com/GAES)



# Charles Krieck

**Chairman  
KPMG in Brazil**

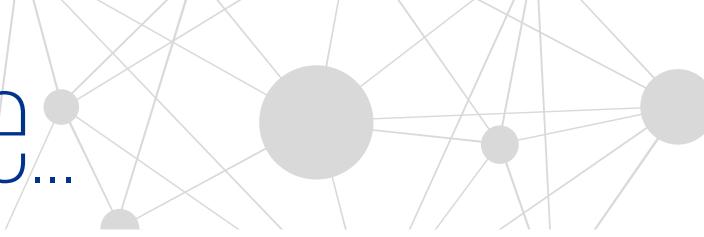


# Ricardo BACELLAR

**Head of Automotive  
KPMG in Brazil**



# We have what to celebrate...



ISTOÉ  
**Dinheiro**

EDIÇÃO N° 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



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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!



**Bloomberg Pursuits** Markets Tech Pursuits Politics Opinion Businessweek

**CARS**

# Adapt or Die Is Marchionne's Stark Farewell Message to Carmakers

By **Tommaso Ebhardt**

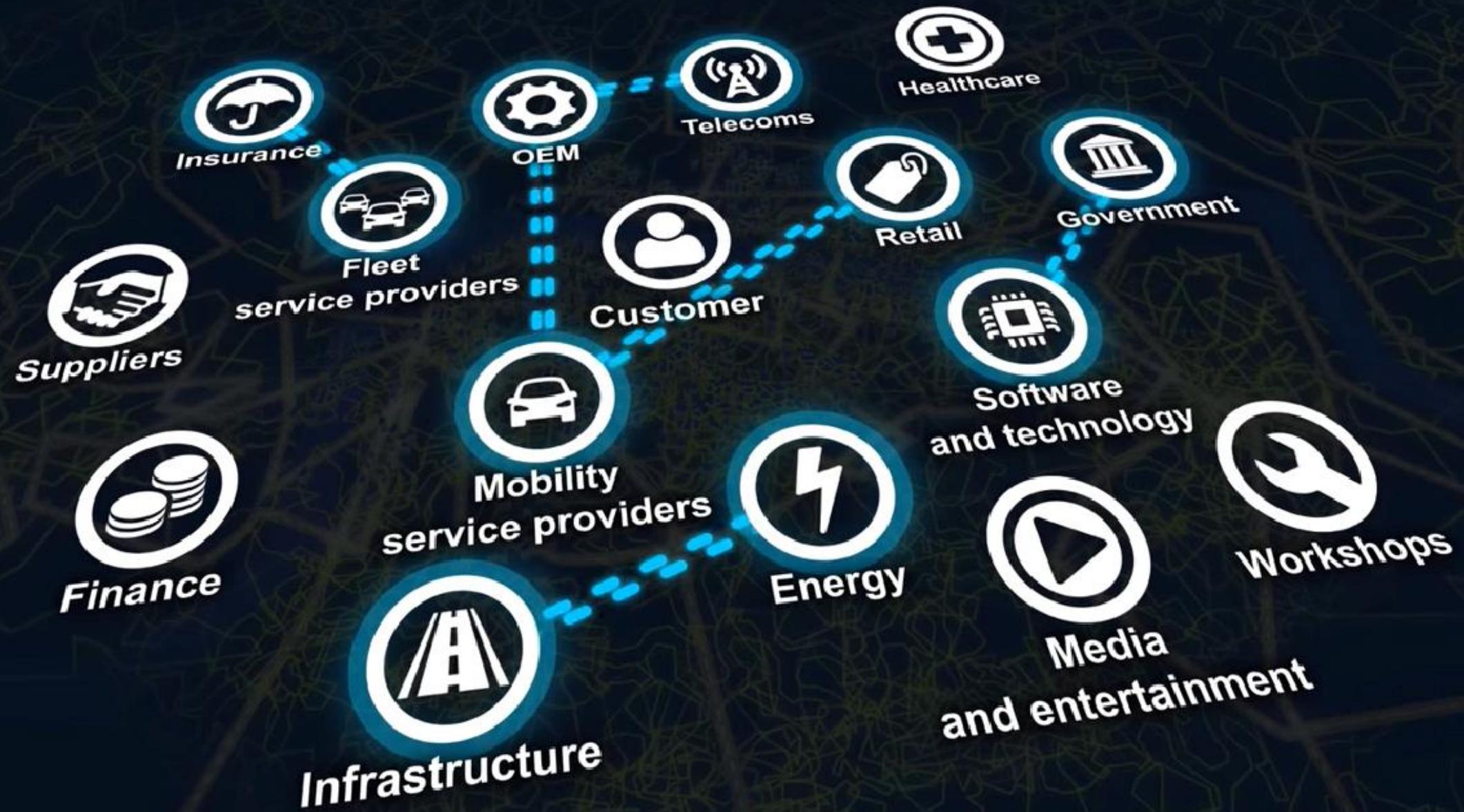
January 15, 2018, 4:00 AM GMT-2 *Updated on* January 15, 2018, 7:12 AM GMT-2

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



What will the future  
mobility ecosystem  
look like?

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



# But there's much more to be done!



TOPICS PODCASTS

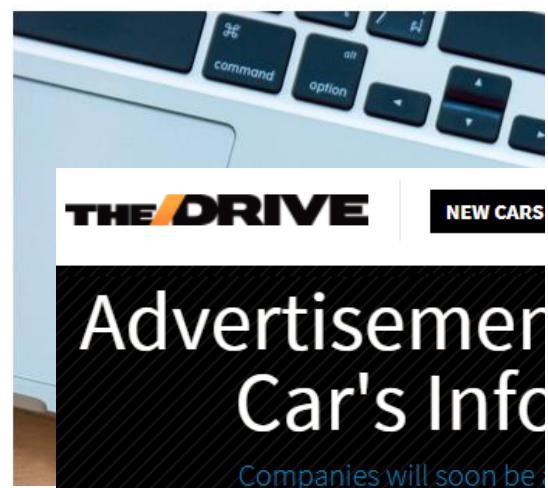
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WS NEWS FEATURES BUYER'S GUIDE

## AI And Automotive Future Is Here

Share this content:

[CarStory](#) uses big data to help match car buy



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 McCommon 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

4:22pm EST



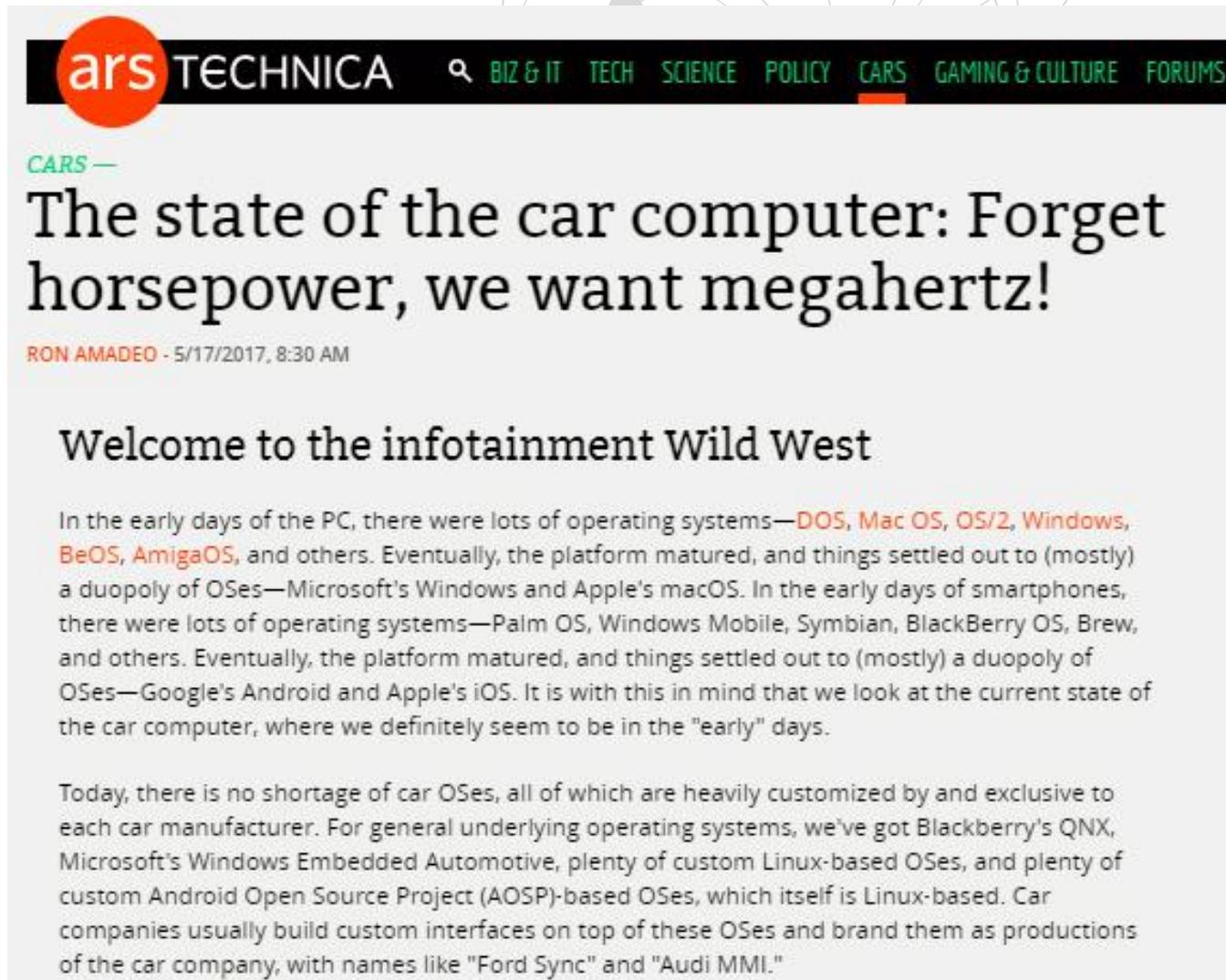
## cash advertising on If-driving cars



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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 Ars Technica website. The header features a navigation bar with categories: BIZ & IT, TECH, SCIENCE, POLICY, CARS (which is highlighted in red), GAMING & CULTURE, and FORUMS. Below the header, a sub-navigation bar shows 'CARS —'. The main title of the article is 'The state of the car computer: Forget horsepower, we want megahertz!' by Ron Amadeo, posted on 5/17/2017, 8:30 AM. The article begins with a paragraph about the early days of computing platforms, comparing it to the current state of car computers. It then discusses the diversity of car operating systems and how car companies build custom interfaces on top of them.

## 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

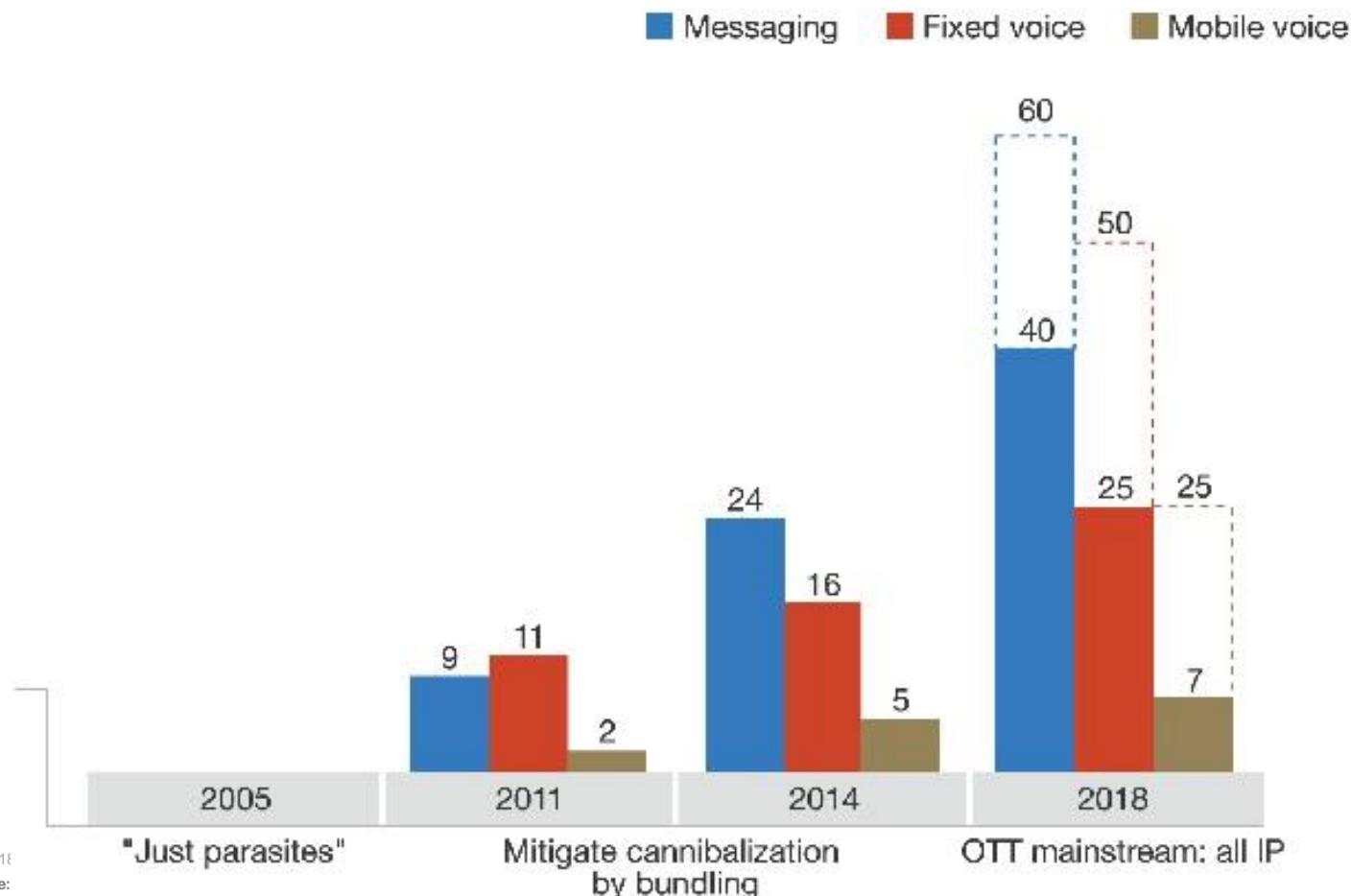
In the early days of the PC, there were lots of operating systems—[DOS](#), [Mac OS](#), [OS/2](#), [Windows](#), [BeOS](#), [AmigaOS](#), and others. Eventually, the platform matured, and things settled out to (mostly) a duopoly of OSes—Microsoft's Windows and Apple's macOS. In the early days of smartphones, 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."

# But there's much more 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!



The screenshot shows the Visa website's header with the Visa logo and navigation links: Pay With Visa, Partner With Us, Run Your Business, Travel With Visa, and Visa Everywhere. Below the header is a search bar. The main content area features the headline "The connected car: Visa looks ahead" and a photograph of a car's side mirror reflecting a road through a forest, symbolizing the connected car.

... 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!

← → ⌂  Secure | <https://economia.uol.com.br/cotacoes/bolsas/acoes/bvsp-boves>

## LOCALIZA ON (RENT3.SA)

Período a ser consultado:

de  a



# But there's much more to be done!



#DEALS

World

Business

Markets

Politics

TV

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

## Shell buys NewMotion charging network in first electric vehicle deal



#TECHNOLOGY NEWS

World

Business

Markets

Politics

TV

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!



Google

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

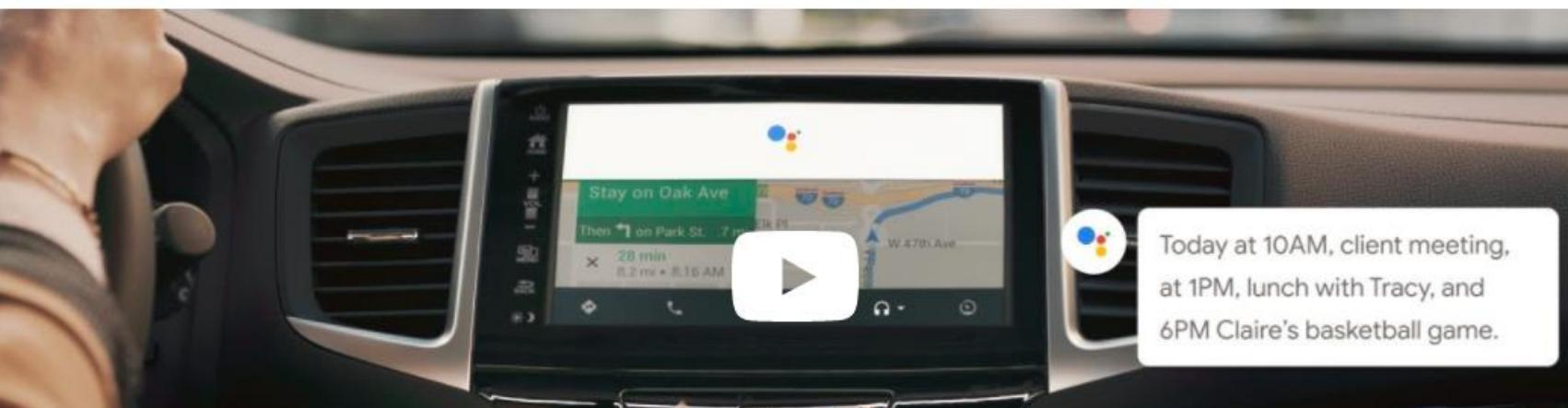
Research

### 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.

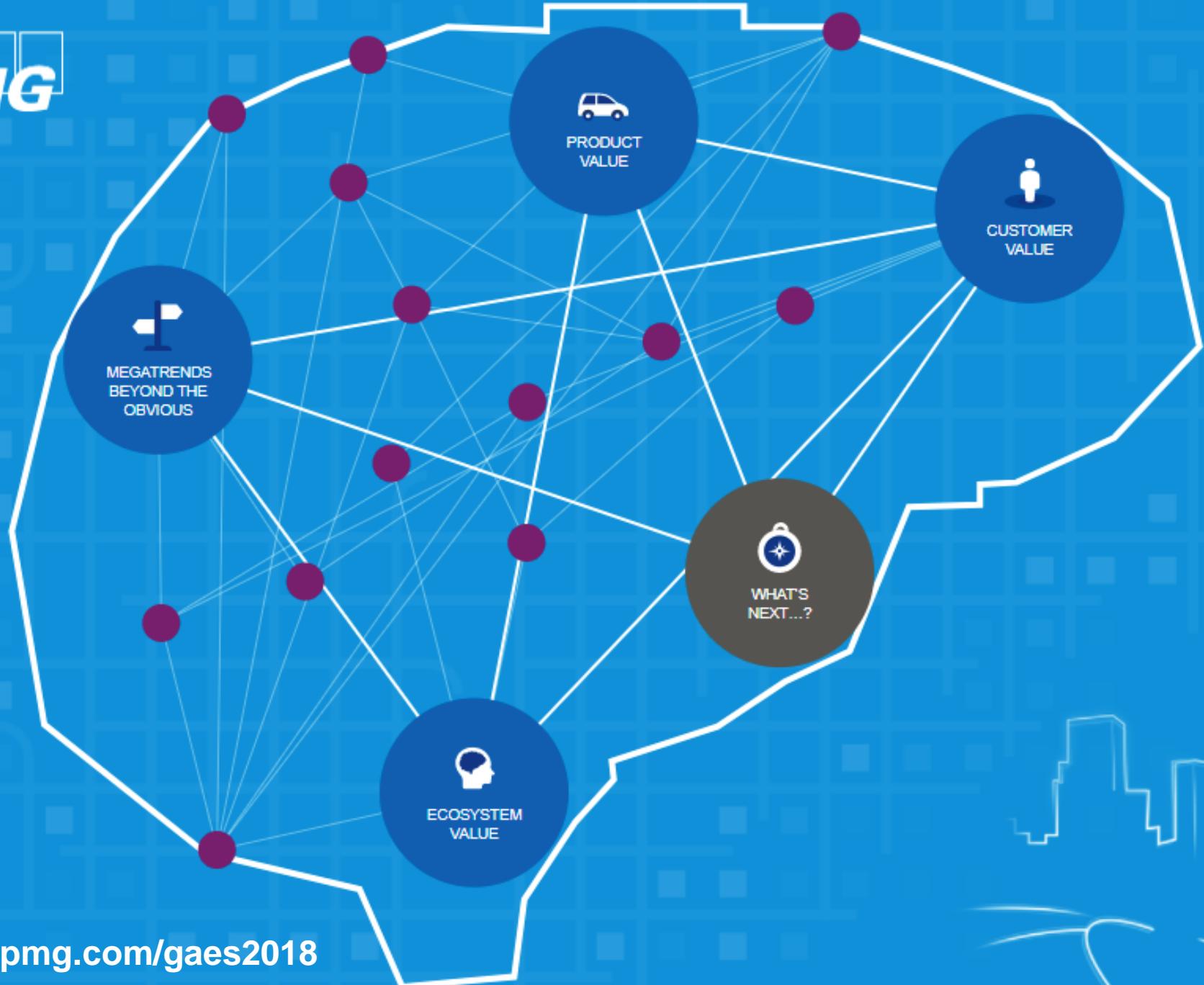
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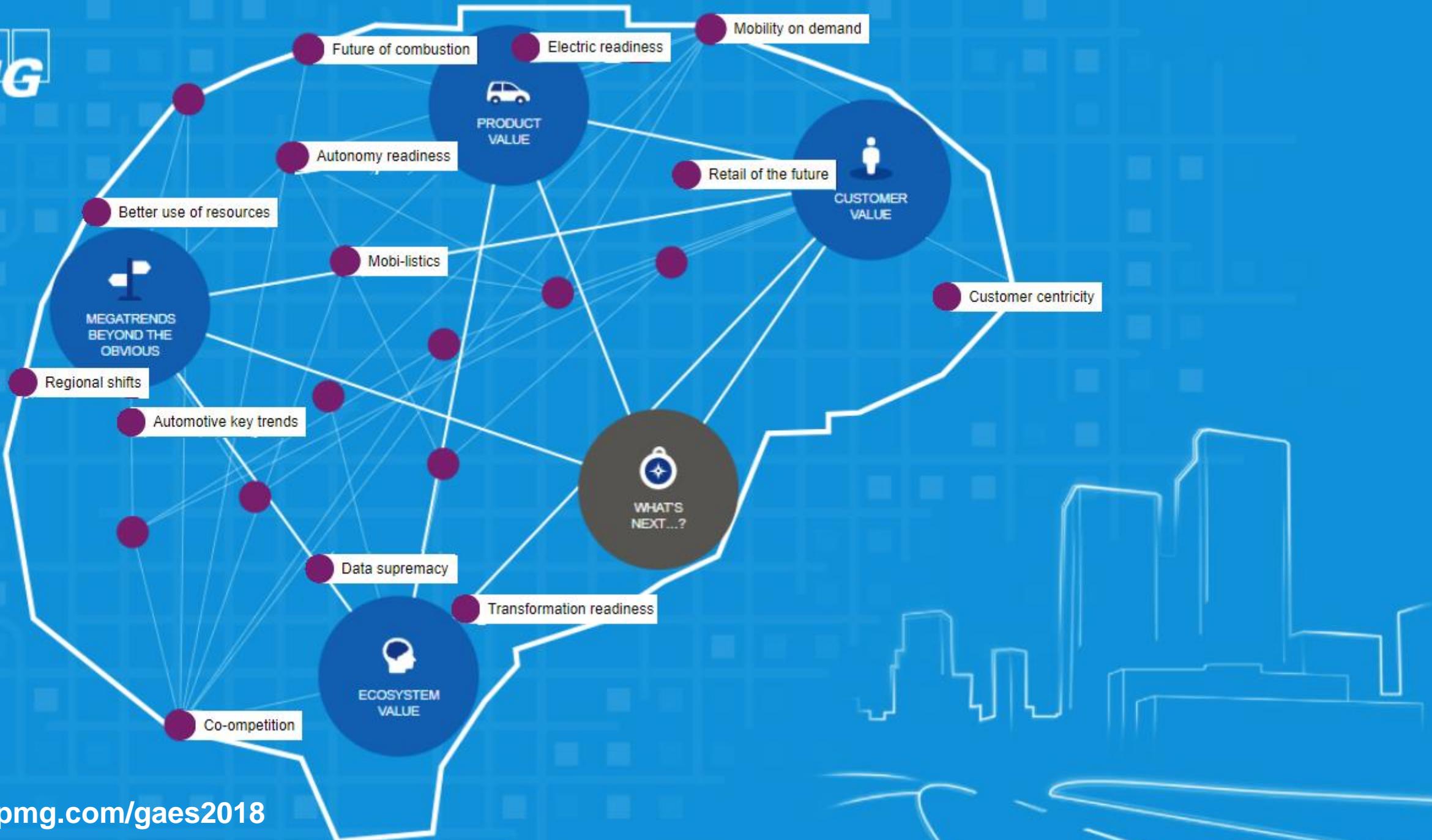
focused toward the impact some of its related



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





# About the executive survey

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

## TOP 5 RESPONDENTS - EXECUTIVES

135 China

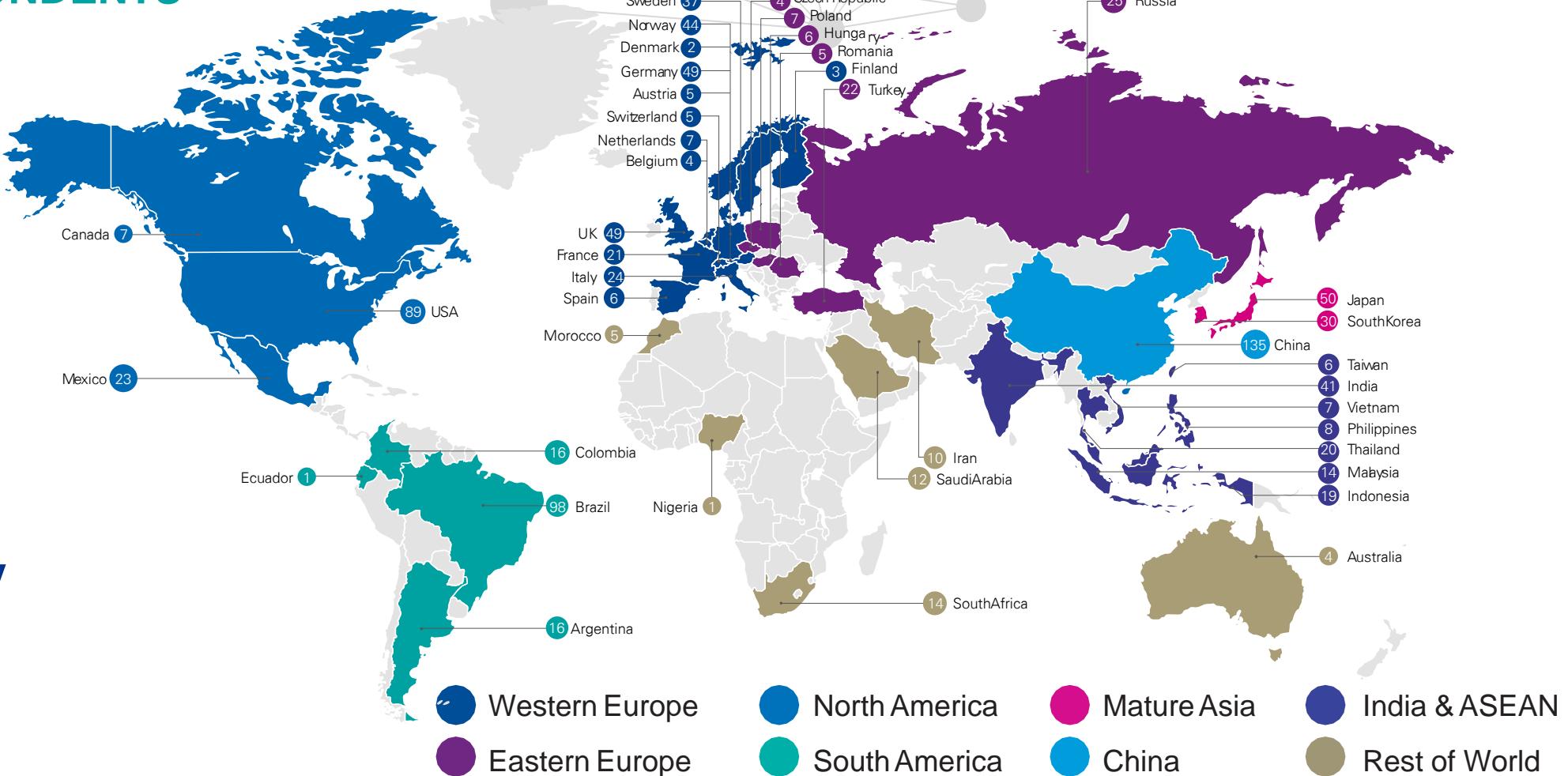
98 Brazil

89 USA

50 Japan

49 Germany

49 UK



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

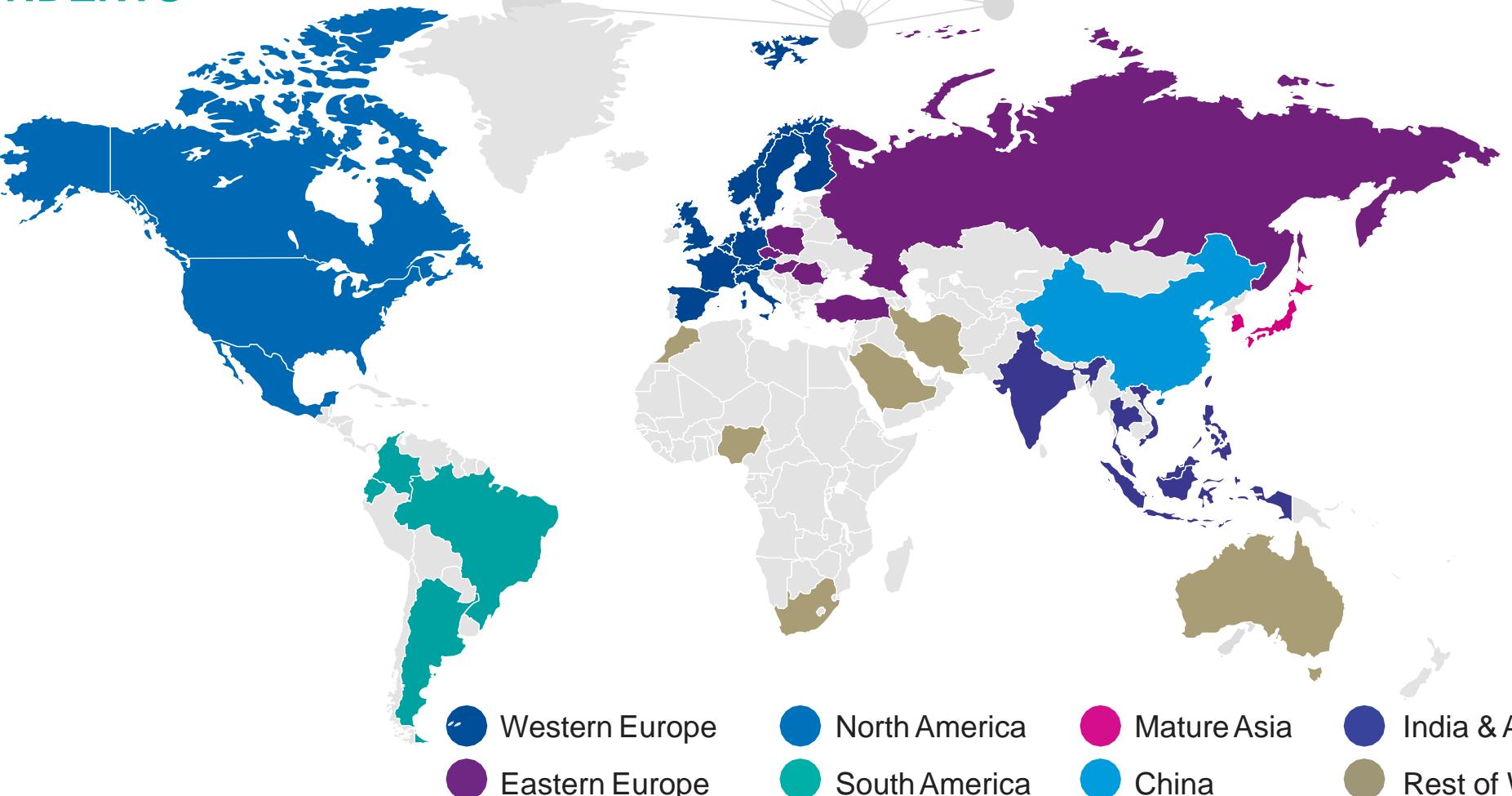
251 China

182 USA

143 Japan

113 Brazil

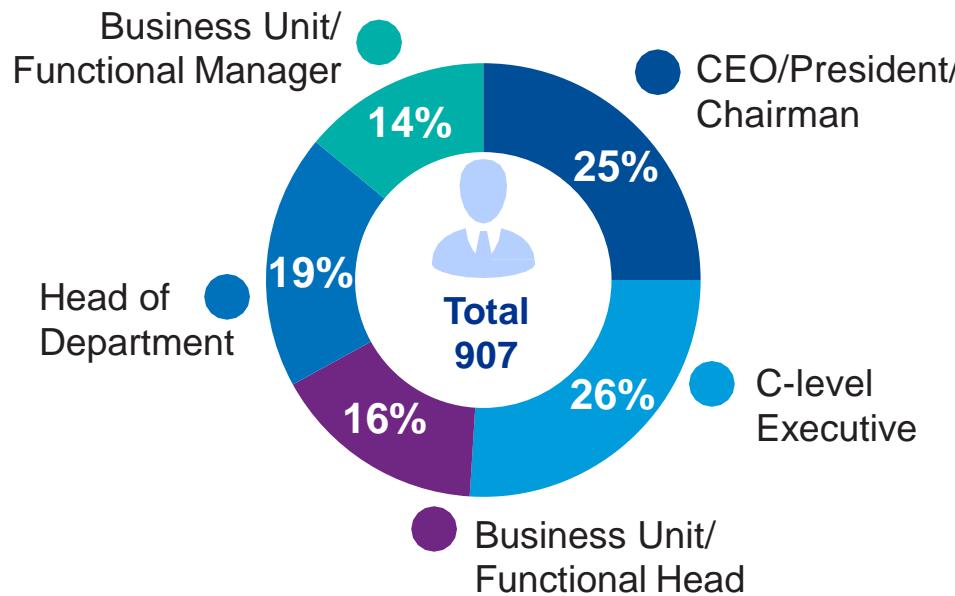
108 Sweden



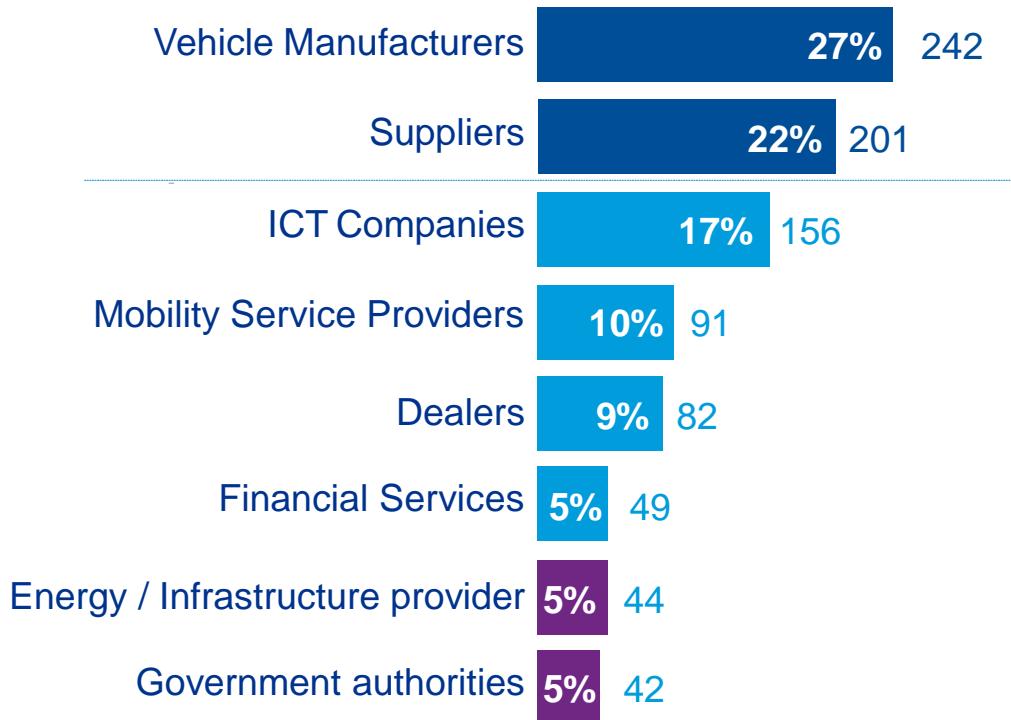
**Note:** Map shows number of respondents from each country | **Source:** KPMG's Global Automotive Executive Survey 2017

# About the executive survey

## Respondents by job title



## Respondents by company type



**Note:** Percentages may not add up to 100 % due to rounding,

ICT = Information, Communication and Technology

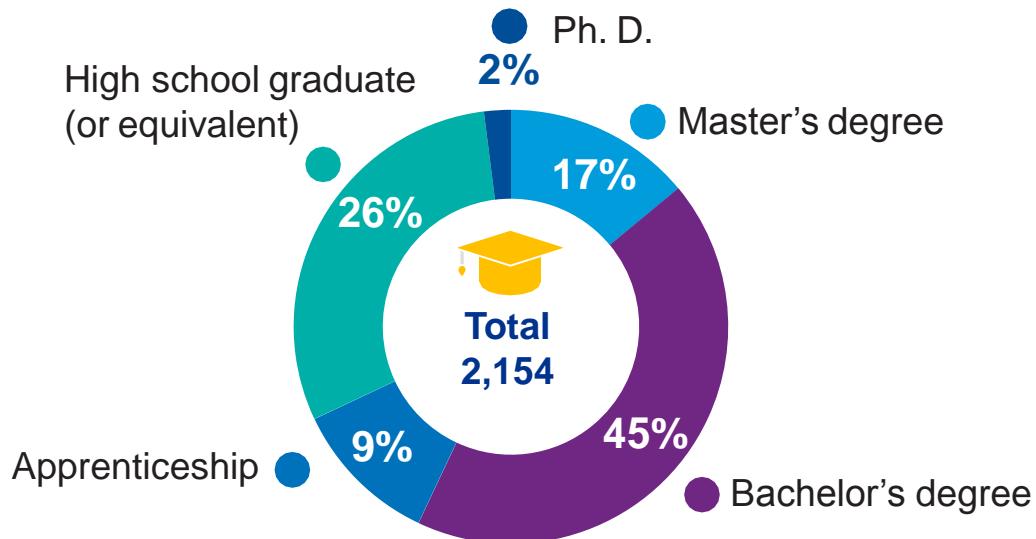
● Upstream (product-driven)

● Downstream (service-driven)

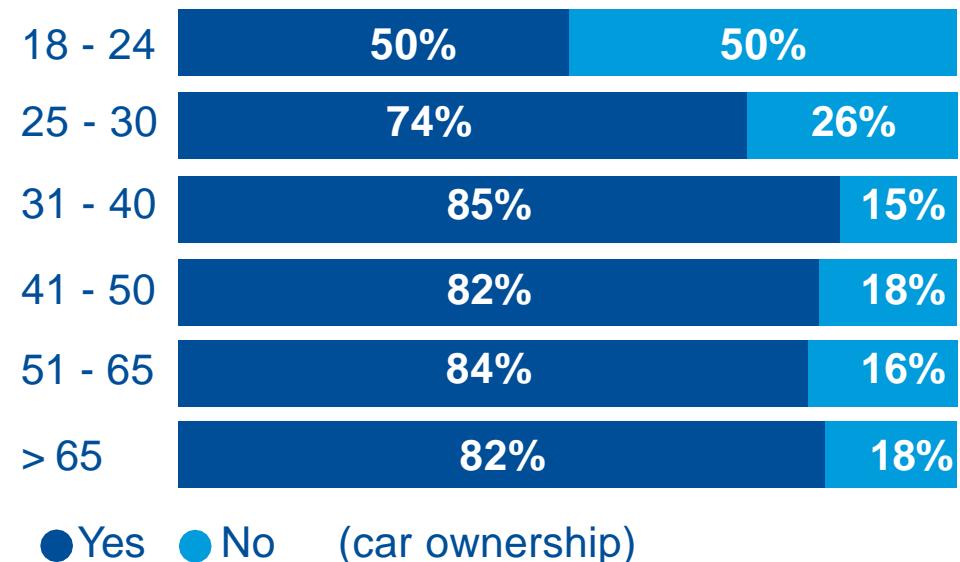
● Surrounding Player

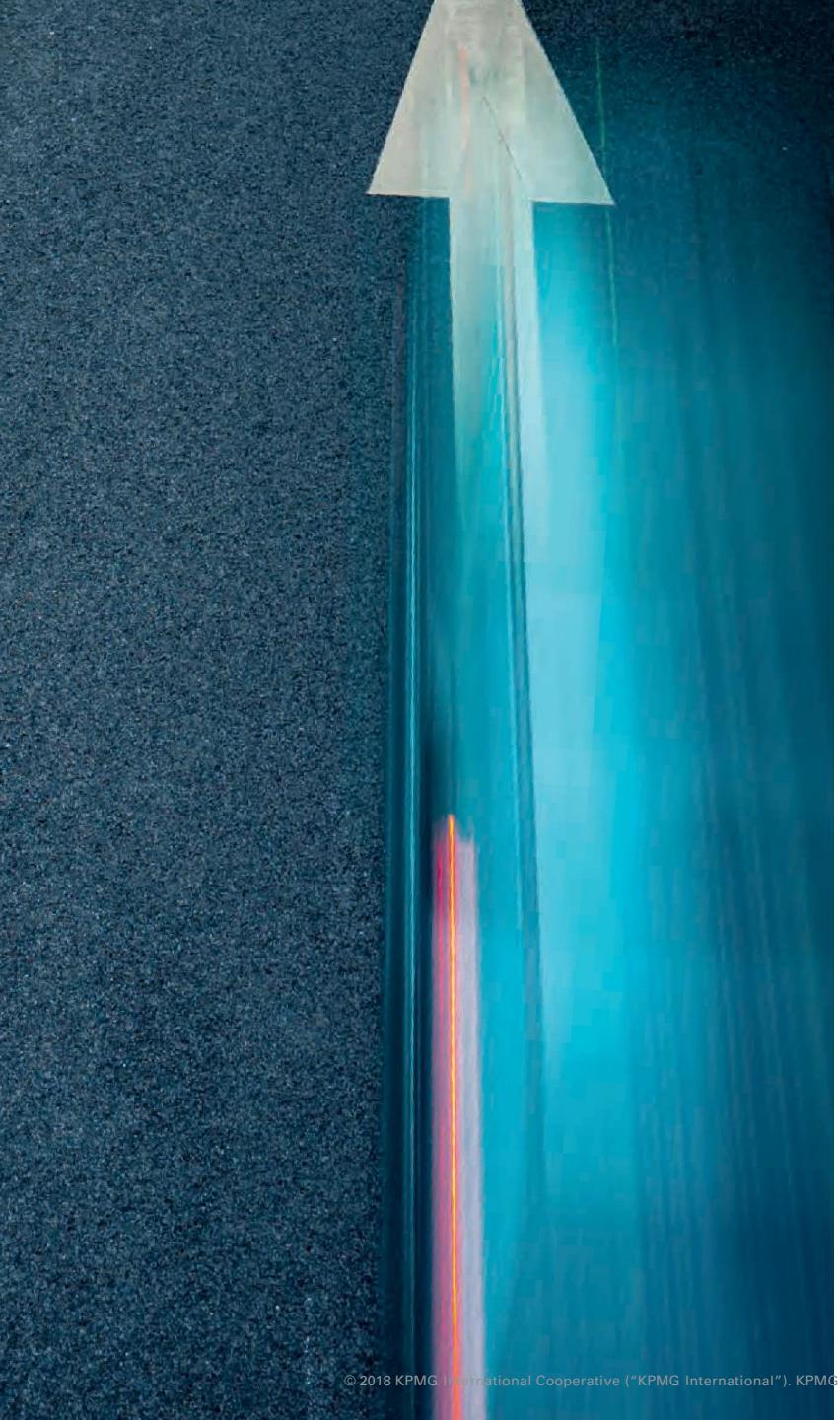
# About the executive survey

## 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

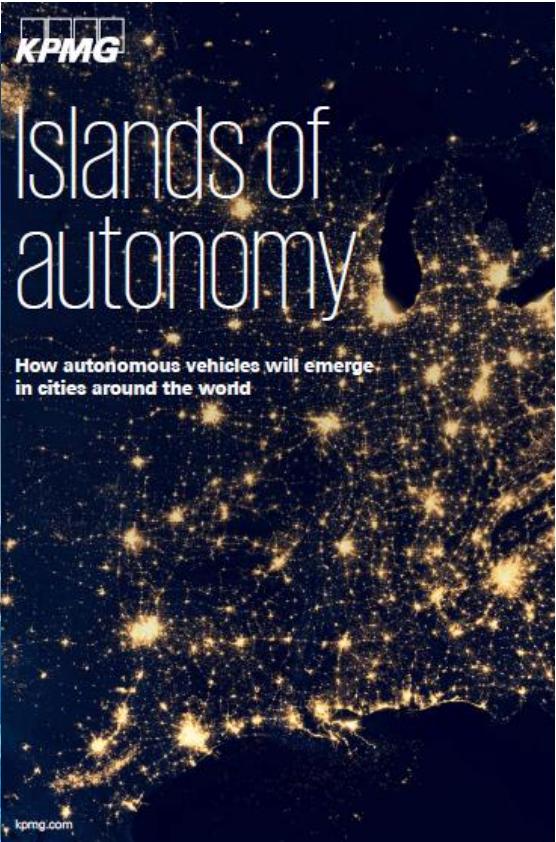


**KPMG**

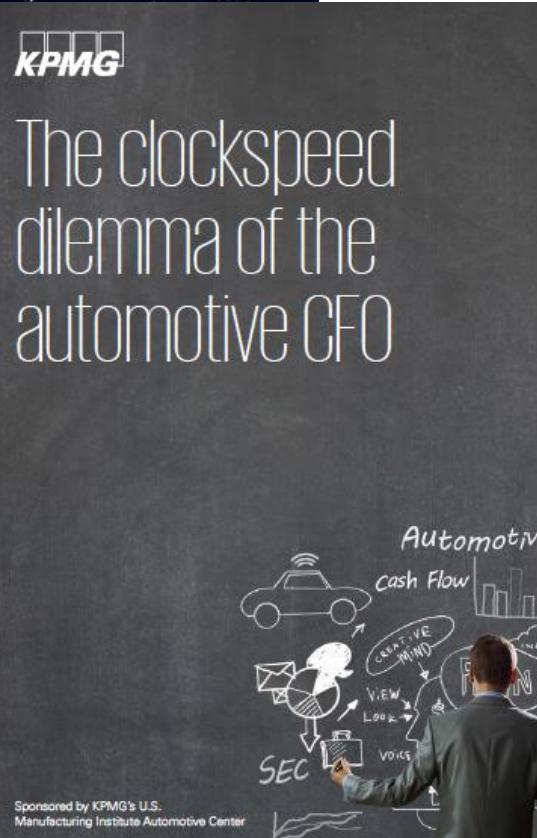
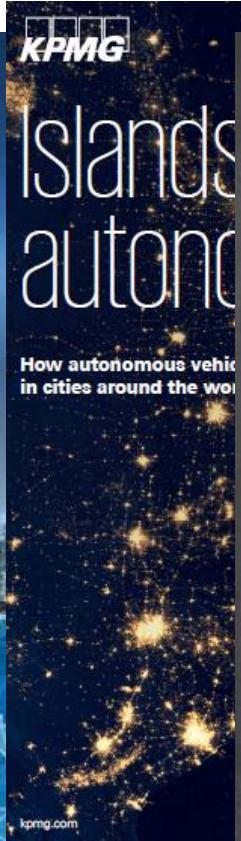
KPMG's 19th consecutive

# Global Automotive Executive Survey 2018

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



# Publicações



# Publicações



**KPMG**

KPMG's 19th consecutive

# Global Automotive Executive Survey 2018

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



**KPMG**

## Islands of autonomy: How autonomous vehicles in cities around the world are changing

How autonomous vehicles in cities around the world are changing

**KPMG**

## The clock dilemma of the automotive industry

The clock dilemma of the automotive industry

**KPMG**

## Protecting the fleet... and the car business

Today's cyber-physical threats disrupt automotive operating models

Sponsored by KPMG's U.S. Manufacturing Institute Automotive Center

[www.kpmg.com/us/automotive](http://www.kpmg.com/us/automotive)

# 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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