



think with Google™

# AUTOMOTIVE TRENDS REPORT 2018

US, Germany, Japan

[autotrendsreport@google.com](mailto:autotrendsreport@google.com)

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**With every query typed into a search bar, users provide a glimpse into their considerations and intentions.**

**By compiling top searches, we're able to render a strong representation of the population and gain insight into their behavior.**

In this Google Auto Trends Report, we are excited to use Google data to identify and compare in-vehicle trends across three different markets: US, Germany, and Japan. The goal of this report is to help auto marketers, researchers and manufacturers better understand what's top of mind for consumers when it comes to driving. We are proud to share this iteration and look forward to hearing back from you.

**Olivier Zimmer & Yarden Horwitz**  
**Trendspotting Project Leads, Google**

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A person with long brown hair, wearing a dark blue long-sleeved shirt, is sitting in the driver's seat of a car. They are holding a black smartphone in their left hand and a black USB-C cable in their right hand. The car's steering wheel and dashboard are visible in the background, which is slightly out of focus. The overall scene suggests a focus on mobile technology and its integration with vehicles.

## OUR FOCUS

The auto industry is undergoing major shifts: adapting to electrification, the rise of mobility services, and a future driven by automation. But with such a focus on tomorrow, what are the opportunities that OEMs might be missing today?

**This report brings a consumer lens to help answer that question. Using Google Search data, we explore what technology and accessories consumers are currently interested in bringing into their vehicles. With it, we hope to unlock new opportunities for OEMs to meet driver needs, wants, and desires that exist right now.**

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How are consumers looking to enhance their driving experience?

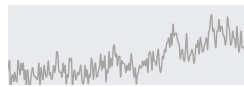


## TO TACKLE THIS QUESTION...

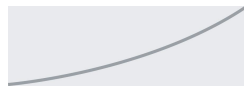
**We identified the biggest search trends**, by pulling top volume queries related to the automotive category and looking at their monthly volume from September 2015 to August 2017.

**We categorized these trends**, by removing any seasonal effect and then measuring the year-over-year growth, velocity, and acceleration for each search query. Based on these metrics, we were able to classify the queries into similar trend patterns. We then curated the most significant trends to illustrate interesting shifts in behavior.

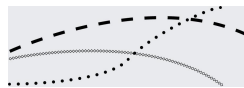
**We went deeper.** With every report, we strive to advance our methodologies to better understand category trends and what's driving them. For this report, we looked beyond Google Search to YouTube data. We analyzed the language within top related videos to uncover how trends are talked about, and the implications for brands. We also stepped away from the data and spoke to over 1,000 consumers across the three markets to better understand how the trends manifest in people's lives.



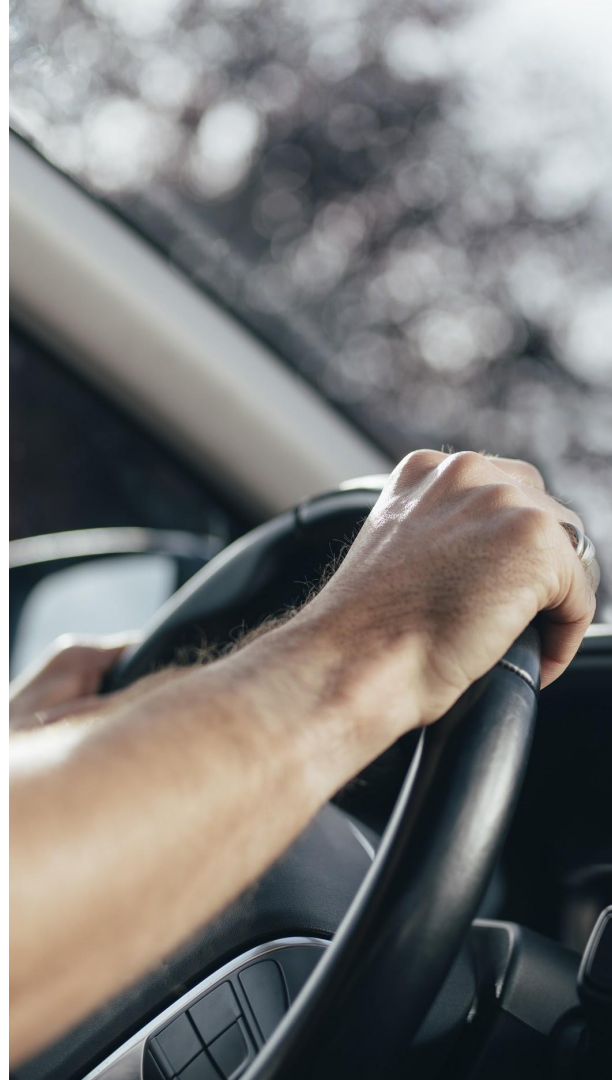
Query



Deseasonalized Query



Total Characteristics



## HOW WE CATEGORIZE TRENDS

Trends to watch  
show six different  
types of behaviors.



### **Sustained Risers**

Steady growth over  
the past years, these  
trends are safe bets.



### **Seasonal Risers**

Seasonal trends that  
are likely to come back  
even stronger.



### **Rising Stars**

Sudden growth within the  
past months, these trends  
might not last.



### **Sustained Decliners**

Steady decline over  
the past years, these  
trends are fading out.



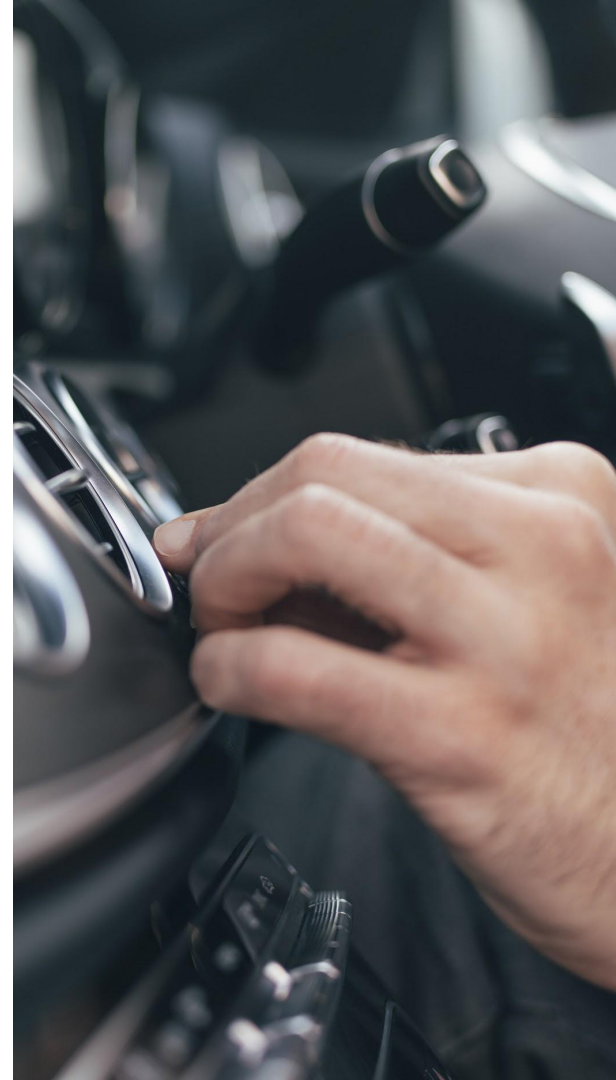
### **Seasonal Decliners**

Seasonal trends that  
are likely to decrease  
in demand every year.



### **Falling Stars**

Fads that have reached  
their peak and have already  
started to decline rapidly.



# WHAT WE DISCOVERED



## PART ONE

A curated overview of what's rising and declining in each market and a spotlight on a trend unique to each one.

## PART TWO

A deep dive into a single in-vehicle search trend growing across all three markets.

# WHAT WE DISCOVERED



## PART ONE

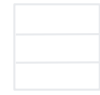
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A deep dive into a single in-vehicle search trend growing across all three markets.



# WHAT WE DISCOVERED



US RISERS, DECLINERS, AND A SPOTLIGHT ON WHAT'S UNIQUE HERE

# US RISERS

Ranked by volume of searches



## Sustained Risers

- car wrap
- steering wheel cover
- car air freshener
- aux adapter
- dog car seat covers
- car dash cam



## Seasonal Risers

- backup camera
- dog car seat
- wireless backup camera
- Bluetooth aux adapter
- car diffuser
- car seat protector



## Rising Stars

- HD mirror cam
- dash camera
- custom wheels visualizer
- car TV screens

# US DECLINERS

Ranked by volume of searches



## Sustained Decliners

Bluetooth car stereo

car radios

custom seat covers

body kits

turbo kits

custom fit seat covers



## Seasonal Decliners

car radio

CB radio

LED light bar

CB radio app

LED driving lights

touch screen stereo



## Falling Stars

fuzzy steering wheel cover

furry seat covers

essential oil diffuser for car

fuzzy car seat covers

## US SPOTLIGHT PUTTING PETS FIRST

When it comes to in-vehicle-related search trends, Americans are putting their pets first. Dog- and pet-related rising search queries are particularly prominent across the top trending lists in the US when compared to the other two markets.

Pets are like family now and people's search interest reflects that. What opportunities does that unlock for OEMS to better design for a broader definition of family, one that puts pets in the passenger seat?

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Source: Google internal data, US, Sep 2015 to Aug 2017

### TOP TRENDING TERMS

dog car seat

dog car seat covers

car seats for dogs

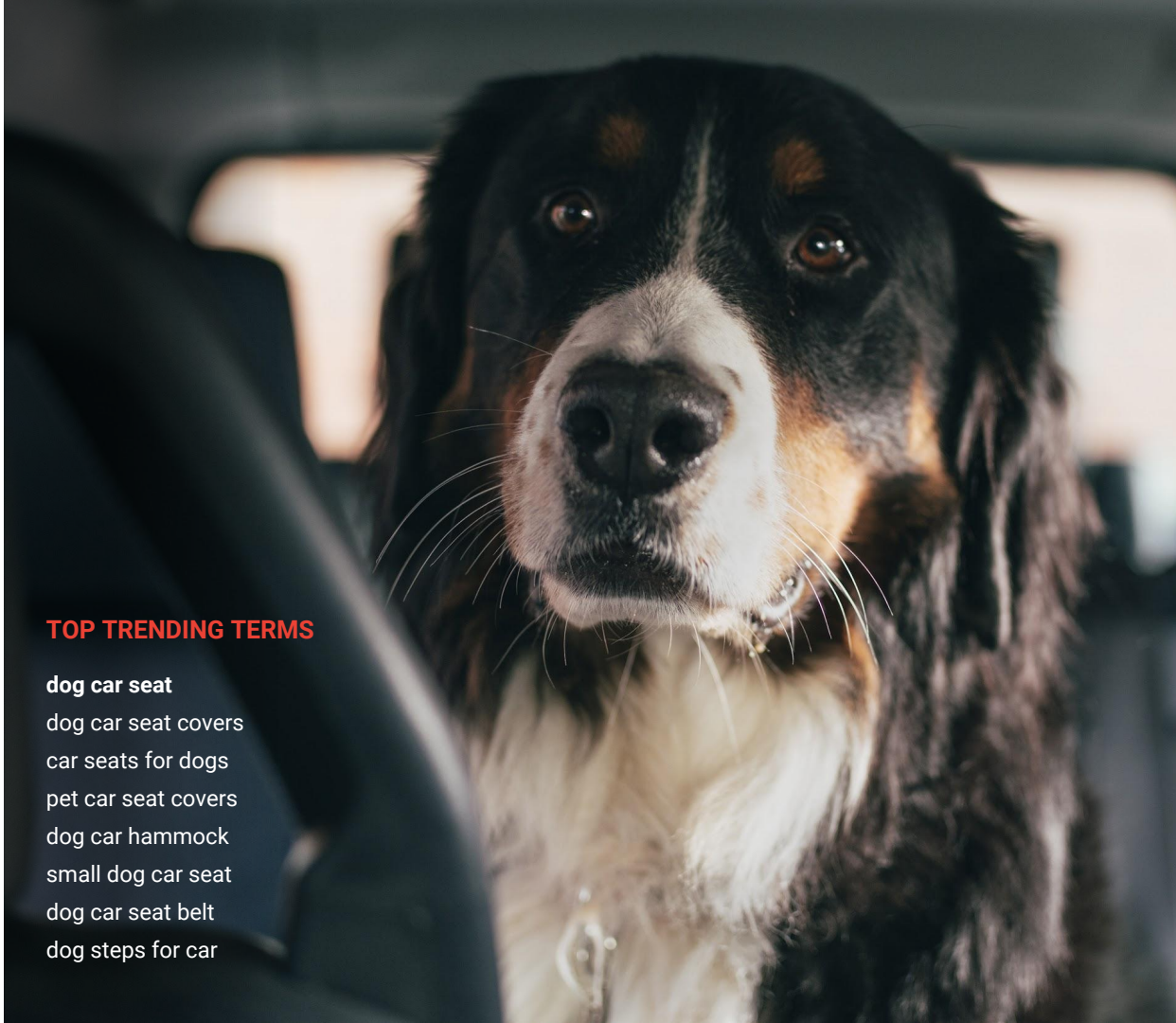
pet car seat covers

dog car hammock

small dog car seat

dog car seat belt

dog steps for car



## US SPOTLIGHT PUTTING PETS FIRST

While consumers in Germany and Japan are also searching for pet-related vehicle equipment and accessories, the average American was 36X as likely to search than the average person in Germany and 10X as likely than the average person in Japan.

### DOG/PET ACCESSORIES

Normalized by population



think with Google

Source: Google internal data, US, Sep 2015 to Aug 2017

“

My dog is already used to his dog harness and gets excited when he sees it! The harness has changed my driving experience because it means that he isn't riding in all the seats or being restless during the drive.

Solimar M, US

US

JP

DE

# WHAT WE DISCOVERED



**GERMANY** RISERS, DECLINERS, AND A SPOTLIGHT ON WHAT'S UNIQUE HERE

# GERMANY RISERS

Ranked by volume of searches



## Sustained Risers

subwoofer auto  
(car subwoofer)

DAB autoradio  
(DAB car radio)

hundegitter auto  
(dog car guard)

2 DIN autoradio  
(2 DIN car stereo)

kopfstützen monitor  
(headrest monitor)



## Seasonal Risers

autoradio mit Bluetooth  
(car radio with Bluetooth)

dashcam erlaubt  
(dash cam allowed)

CD player mit Bluetooth  
(CD player with Bluetooth)

autoradio mit navi 1 DIN  
(car radio with 1 DIN GPS)

antennenverstärker auto  
(car antenna amplifier)



## Rising Stars

autoradio ausfahrbar  
(extendable car radio)

autokamera erlaubt  
(car camera allowed)

autozubehör kinder  
(car accessories for children)

radio DAB+ Bluetooth  
(DAB+ radio Bluetooth)

# GERMANY DECLINERS

Ranked by volume of searches



## Sustained Decliners

headlights  
(headlights)

cb funk kanäle  
(cb radio channels)

rückfahrkamera wlan  
(wireless rear view camera)

multimedia autoradio  
(multimedia car radio)

car dvd player  
(car dvd player)



## Seasonal Decliners

winterreifen  
(winter tires)

winterräder  
(winter wheels)

car wrapping  
(car wrapping)

xenon scheinwerfer  
(xenon headlights)

Sitzbezüge auto  
(car seat covers)



## Falling Stars

car hifi  
(car hifi)

sitzheizung auto  
(heated car seats)

fernseher bluetooth nachrüsten  
(tv retrofit bluetooth)

car hifi subwoofer  
(car hifi subwoofer)

besitzbare autositzauflage  
(heated car seat pad)



## GERMANY SPOTLIGHT TRANSITIONING TO DIGITAL

In Germany, DAB, or Digital Audio Broadcasting, is a top trending search term. Interest is likely driven by a country-wide initiative launched in 2010 to convert all radio and television services to digital in the coming years.

With DAB being top of mind for consumers right now, how might auto manufacturers activate around this interest (e.g., highlight DAB technology in your vehicle and the benefits of it)?

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Source: Google internal data, Germany, Sep 2015 to Aug 2017



### TOP TRENDING TERMS

**DAB autoradio**  
(DAB car radio)

autoradio DAB+  
(DAB+ car radio)

DAB antenne auto  
(DAB car antenna)

DAB+ autoradio test  
(DAB+ car radio test)

radio DAB+ Bluetooth  
(DAB+ Bluetooth radio)

## GERMANY SPOTLIGHT TRANSITIONING TO DIGITAL

Even though the country-wide initiative launched in 2010, the DAB search trend is experiencing sustained year-over-year growth at a rate of 41% in Germany.

**DAB ONLY**  
Normalized by population

| 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017

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Source: Google internal data, Germany, Sep 2015 to Aug 2017

“

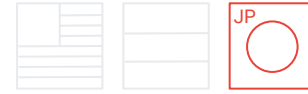
I simply bought a new DAB-compatible radio to get a more stable radio connection. I really enjoy the clear sound now.

**Björn G, DE**

DE



# WHAT WE DISCOVERED



**JAPAN** RISERS, DECLINERS, AND A SPOTLIGHT ON WHAT'S UNIQUE HERE

# JAPAN RISERS

Ranked by volume of searches



## Sustained Risers

ドライブ レコーダー  
(drive recorder)

カー 用品  
(car accessories)

スマート キー ケース  
(smart key case)

後部 座席 モニター  
(rear seat monitor)

ミラー 型 ドライブ レコーダー  
(mirror drive recorder)



## Seasonal Risers

ハンドル カバー  
(steering wheel cover)

車 シート カバー  
(car seat cover)

サンシェード 車  
(sunshade car)

ブルートゥース 車  
(Bluetooth car)

車 カーテン  
(car curtain)



## Rising Stars

ドライブ レコーダー 360 度  
(drive recorder 360 degrees)

シリコン スプレー 車 ボディ  
(car body silicone spray)

車 シートカバー かわいい  
(cute car seat cover)

キャンバス シートカバー  
(canvas seat cover)

駐車 監視 ドライブ レコーダー  
(parking monitoring drive recorder)

# JAPAN DECLINERS

Ranked by volume of searches



## Sustained Decliners

LED ヘッドライト  
(LED headlight)

サンバイザー車  
(car sun visor)

サイドビューカメラ  
(side view camera)

車ヘッドライトLED  
(car headlights LED)



## Seasonal Decliners

フォグランプLED  
(fog lights LED)

カーオーディオ取り付け  
(car audio attachment)

サンバイザーモニター  
(sun visor monitor)

車載用空気清浄機  
(automotive air cleaner)



## Falling Stars

ドライブレコーダー無料アプリ  
(free drive recorder app)

SDカード音楽車  
(SD card for car music)

ポータブルDVDプレーヤー車載ホルダー  
(portable DVD player-vehicle holder)

## JAPAN SPOTLIGHT

### A HOME AWAY FROM HOME

Top rising searches in Japan indicate a consumer desire to customize car interiors for comfort and aesthetics. From seat covers and car curtains to fridges and humidifiers, we see that consumers in Japan are turning their cars into little homes away from home.

What opportunities are there for auto manufacturers to consider the car as not just a vehicle for driving but as an extension of one's home?

think with Google

Source: Google internal data, Japan, Sep 2015 to Aug 2017

#### TOP TRENDING TERMS

車シートカバー  
(car seat cover)

車カーテン  
(car curtain)

車座布団  
(car cushion)

車加湿器  
(car humidifier)

車冷蔵庫  
(car refrigerator)



## JAPAN SPOTLIGHT

### A HOME AWAY FROM HOME

The average person in Japan is almost 2X as likely to search for customization than the average person in the US, and almost 5X times as likely than the average person in Germany.

**CUSTOMIZATION**  
Normalized by population



“

I have a Rilakkuma steering wheel cover, with Gachapin and Mukku cushions. I'm happy being surrounded by what I love inside the car.

**Pooh N, JP**



## KEY TAKEAWAYS FROM MARKET SPOTLIGHTS

**While the biggest trends in each market vary, one thing is the same across all markets: larger cultural shifts happening outside of the car are influencing what people are searching for when it comes to enhancing their driving experience.**

Americans are re-defining “family.” Consumers in the US are bringing their pets along for the ride, and prioritizing the needs of their new passengers.

How might auto manufacturers better design and communicate for a broader definition of family, one that puts pets in the passenger seat?

DAB (Digital Audio Broadcasting) is top of mind for German consumers right now, following a 2010 country-wide initiative to convert all radio and TV signals to digital.

How might auto manufacturers activate around this interest (e.g., highlight DAB technology in your vehicle and the benefits of it)?

In Japan, consumers are seeking to recreate homey comfort and style for their in-vehicle experiences.

How might auto manufacturers consider the car as not just a vehicle for driving but a space for living?



# WHAT WE DISCOVERED



## PART ONE

## PART TWO

A curated overview of what's rising and declining in each market and a spotlight on a trend unique to each one.

A deep dive into a single in-vehicle search trend growing across all three markets.



## A CULTURAL DESIRE TO RECORD HAS COME TO AUTO

As cameras have an increasing presence in our day-to-day lives, we see our cultural desire to record and capture take roots in the auto industry. We've discovered that **the biggest in-vehicle search trend across all three markets is onboard (in-car) cameras.**

While many vehicles currently feature backup cameras, the following section demonstrates that consumers are looking for different types of onboard cameras to meet additional needs, presenting opportunities for manufacturers to think about how to integrate new styles of onboard cameras directly into vehicle design.

“

In the United States we record EVERYTHING!  
It has just become second nature.

Susan B, US

## THE ONBOARD CAMERA IS A HUGE CONSUMER-LED TREND

Among the top in-vehicle-related searches, onboard cameras are trending across all three markets. In fact, search volume for onboard cameras is 3X as large as search volume for autonomous driving.

Consumer search interest around onboard cameras reveals near-term opportunities for OEMs to consider, from product innovation to marketing communications.



3X

AS MANY SEARCHES FOR  
ONBOARD CAMERAS VS.  
AUTONOMOUS DRIVING

## CONSUMERS ARE SEARCHING FOR ALL KINDS OF ONBOARD CAMERAS

The variety of language consumers use to describe the same products (i.e., dash cam, dash camera, car security camera) demonstrates that the onboard camera category is just in its early stages, with terminology not yet fully established. That said, we see that there are already a variety of products on the market that cater to different consumer needs.

There is an opportunity to own the language around onboard cameras. How might an auto manufacturer establish its brand within the lexicon of onboard camera terminology?

Top rising onboard camera queries by market (ranked by volume)

US

### dash cam

backup camera

wireless backup camera

HD mirror cam

dash camera

Bluetooth backup camera

car security camera

mirror camera

hidden car camera

front and rear dash cam

car camera system

dual dash cam

spy camera for car

DE

### dash cam (dash cam)

funk rückfahrkamera  
(wireless rear view camera)

navi mit rückfahrkamera  
(GPS with rear view camera)

dash cam erlaubt  
(dash cam allowed)

rückfahrkamera kabellos  
(rear view camera wirelessly)

Bluetooth rückfahrkamera  
(Bluetooth rear view camera)

dash cam app deutsch  
(dash cam app german)

JP

### ドライブ レコーダー (drive recorder)

バックカメラ  
(backup camera)

ドライブ レコーダー 取り付け  
(drive recorder mounted)

ドライブ レコーダー 駐車 監視  
(drive recorder parking monitoring)

バックカメラ 取り付け  
(backup camera attachment)

ドライブ レコーダー 前後  
(drive recorder front and back)

ミラー 型ドライブ レコーダー  
(mirror type drive recorder)

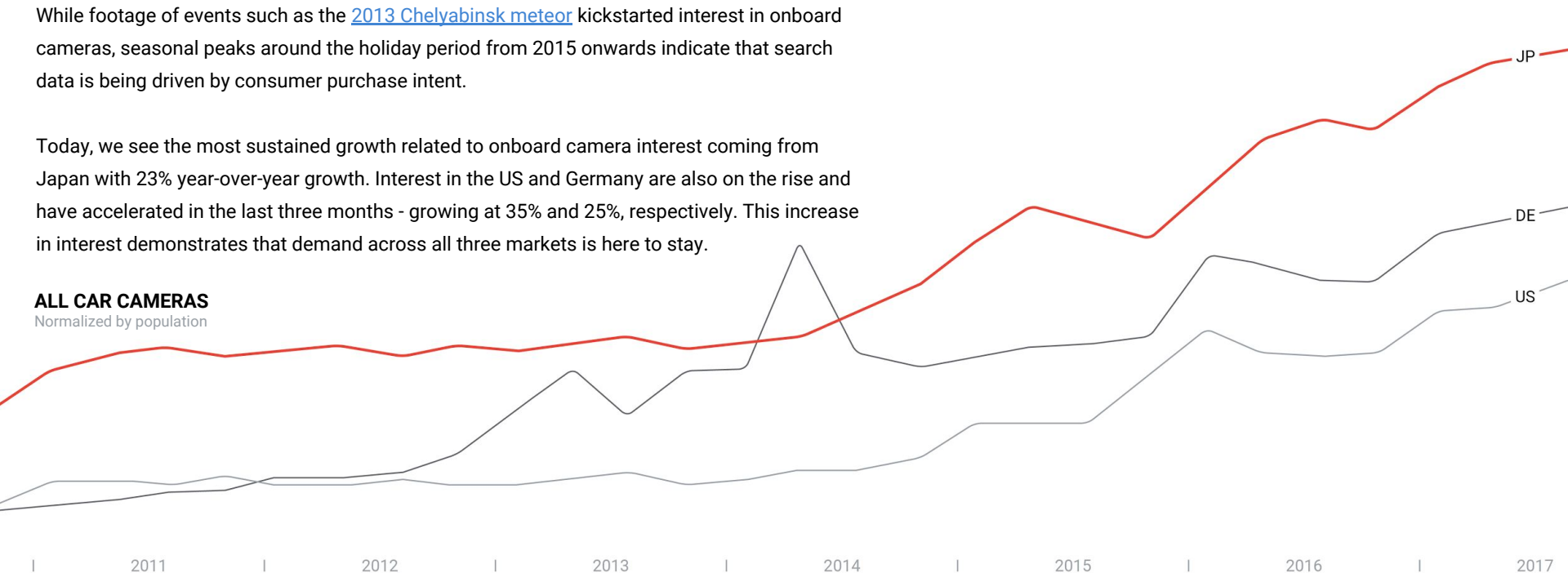
## CONSUMER INTEREST IS TAKING OFF

While footage of events such as the [2013 Chelyabinsk meteor](#) kickstarted interest in onboard cameras, seasonal peaks around the holiday period from 2015 onwards indicate that search data is being driven by consumer purchase intent.

Today, we see the most sustained growth related to onboard camera interest coming from Japan with 23% year-over-year growth. Interest in the US and Germany are also on the rise and have accelerated in the last three months - growing at 35% and 25%, respectively. This increase in interest demonstrates that demand across all three markets is here to stay.

### ALL CAR CAMERAS

Normalized by population



think with Google

Source: Google internal data, US, Japan, Germany, Sep 2010 to Aug 2017

## AND HERE'S WHERE IT'S GOING

Beyond “dash cams” and “backup cams,” we’re seeing consumer appetite for new types of onboard cameras that meet different needs. This demonstrates that the onboard camera trend will continue to evolve and embed itself into the driving experience.

### 1 CAPTURING EVERY ANGLE

Consumers want onboard cameras that go beyond just recording the road ahead.

### 2 SEAMLESS INTEGRATION

Consumers want sleek, integrated onboard camera solutions.

### 3 ENHANCED FEATURES

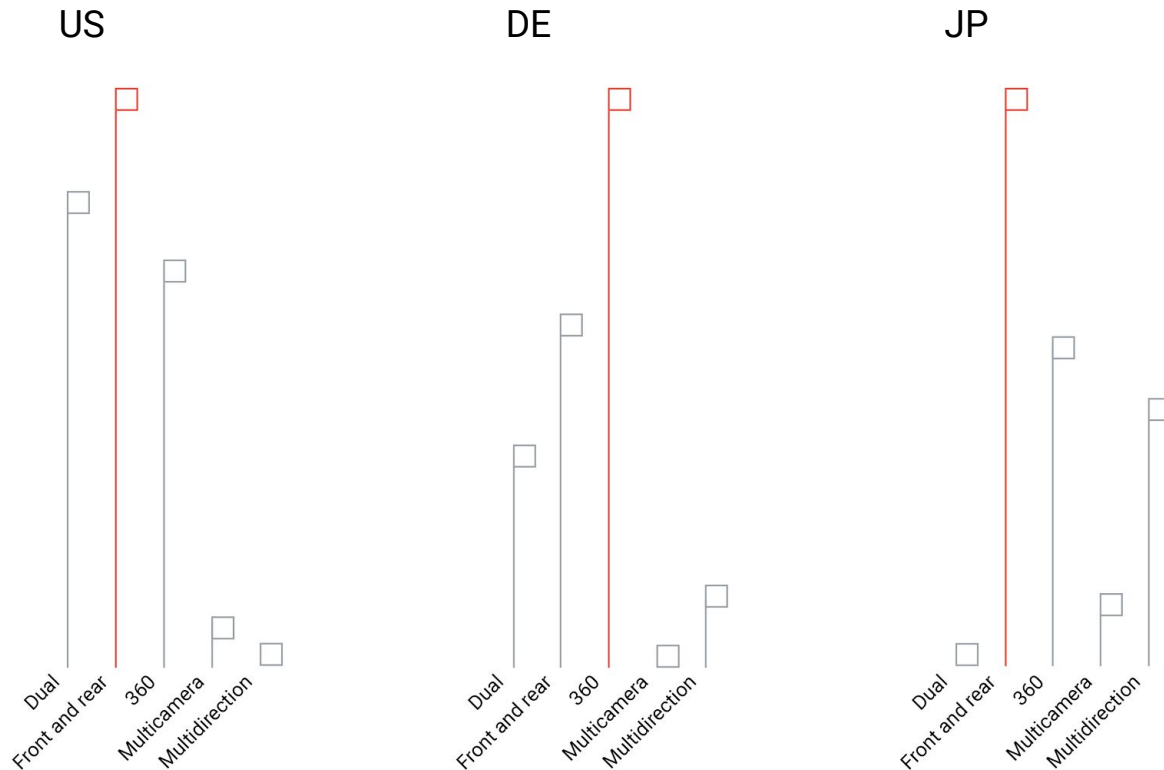
Consumers want onboard cameras to be smarter, better, and to do more for them.

## 1. CAPTURING EVERY ANGLE

# CONSUMERS WANT ONBOARD CAMERAS THAT RECORD MORE THAN THE ROAD AHEAD

Drivers want to make sure that all angles, inside and outside of the vehicle, are being captured. Search interest for all direction cameras are growing around ~100% year-over-year across the three markets.

How might auto manufacturers extend driver vision even further, and make blind spots a thing of the past?



## 2. SEAMLESS INTEGRATION

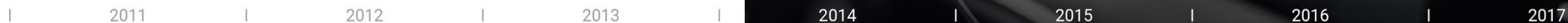
# CONSUMERS WANT SLEEK, INTEGRATED ONBOARD CAMERA SOLUTIONS

Searches for “mirror” and “hidden” onboard cameras are gaining strong traction in the US and Japan, indicating that consumers in these markets want more unobtrusive camera options. While the trend is sustained at a growth rate of 28% year-over-year in Japan, interest across all types of discrete onboard cameras is growing at a rate of 303% year-over-year in the US.

How else can auto manufacturers integrate onboard cameras and monitors in a more seamless way?

### INTEGRATED CAMERAS 2010–2017

Normalized by population



think with Google

Source: Google Internal Data, US, Japan, Germany, Sep 2010 to Aug 2017



“

I have a mirror dash cam but honestly I wish it was even smaller, so that it was less noticeable.

Takiko R, JP

US

JP

DE

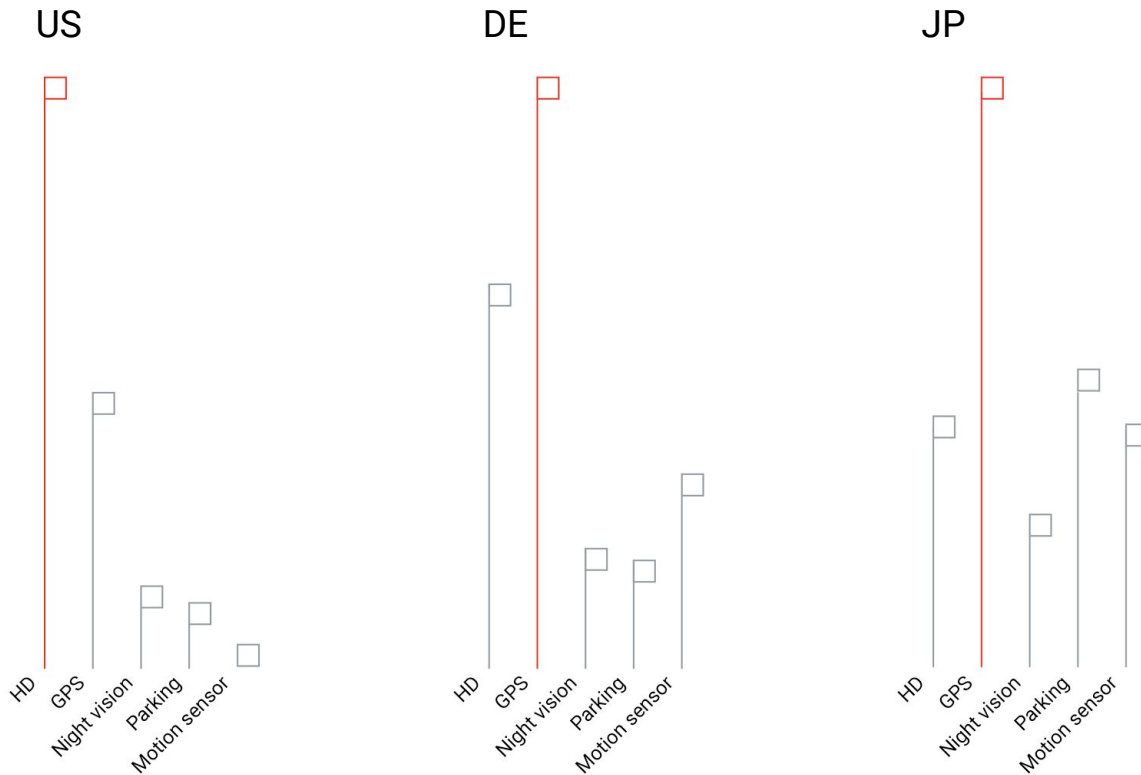


### 3. ENHANCED FEATURES

## CONSUMERS WANT ONBOARD CAMERAS TO BE SMARTER, BETTER, AND TO DO MORE FOR THEM

Specifically, they are looking for cameras that are HD and also offer advanced features such as GPS, night vision, and motion activation. GPS is the most in-demand feature in Germany and Japan, growing at a sustained year-over-year rate of 25% and 34%, respectively.

Cameras unlocked new technical capabilities for smartphones - how might they do the same for the vehicle? What are other ways that auto manufacturers might enhance the driving experience through the platform of an onboard camera?



## WHY DO CONSUMERS CARE ABOUT ONBOARD CAMERAS?

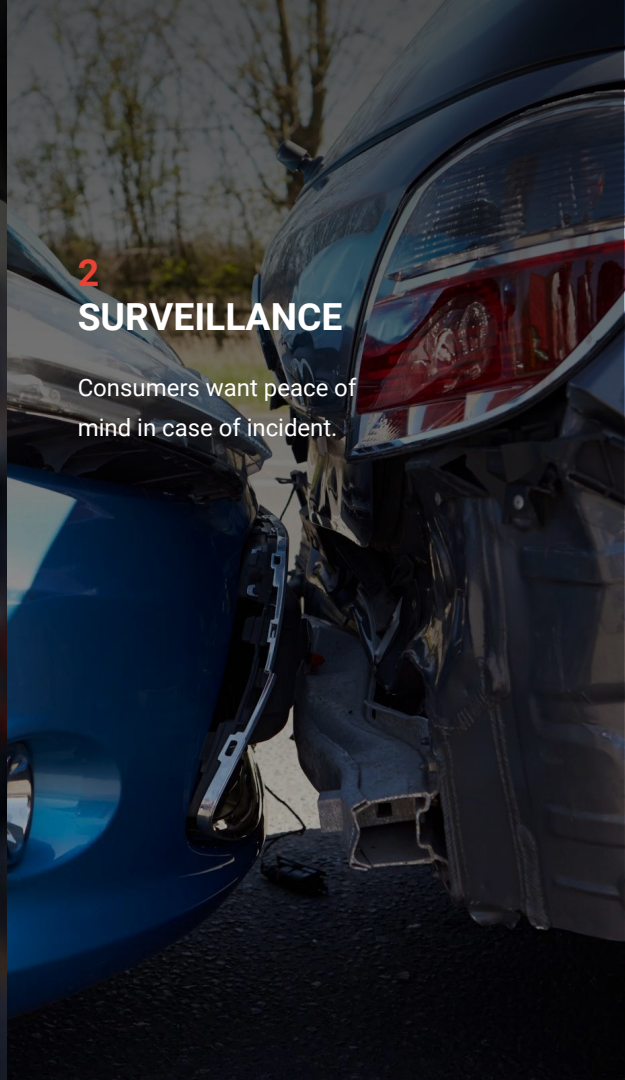
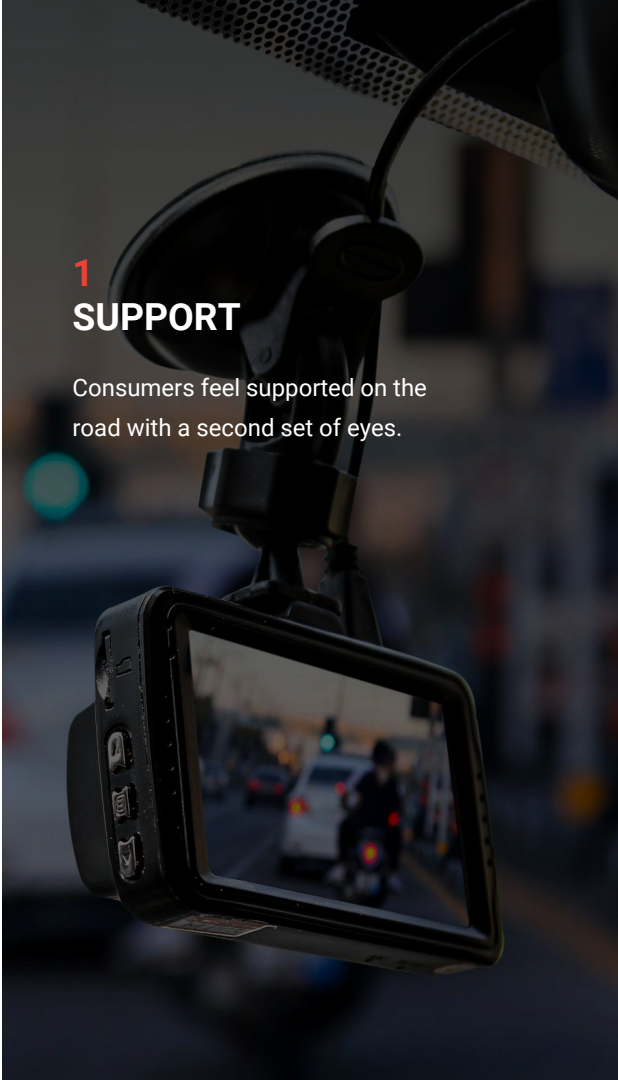
Using Google data, as well as qualitative and cultural investigation for added context, we uncovered two reasons why consumers are so interested in onboard cameras.

### 1 SUPPORT

Consumers feel supported on the road with a second set of eyes.

### 2 SURVEILLANCE

Consumers want peace of mind in case of incident.



## 1. SUPPORT

# CONSUMERS WANT A SECOND PAIR OF EYES WHILE ON THE ROAD

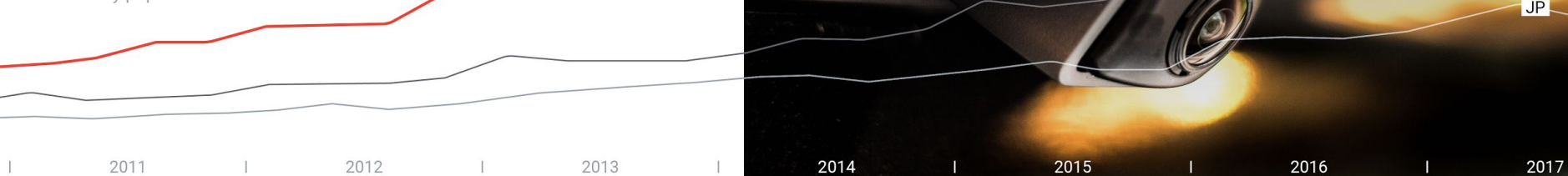
Consumers are using onboard cameras for driving assistance and support. Interest in backup cameras continues to grow at 22% year-over-year.

As seen earlier, consumers are looking for cameras that cover all angles - they want to get rid of blind spots. Camera capabilities enable consumers to drive safer and smarter.

How else can extended vision enable consumers to drive more confidently?

### BACKUP CAMERA 2010-2017

Normalized by population



think with Google

Source: Google internal data, US, Japan, Germany, Sep 2010 to Aug 2017

“

I feel like it is a second set of eyes, a part of me like a leg or arm, there to help me in any given situation. It's supporting me in my driving experience every time I get in my vehicle.

Sarah T, DE



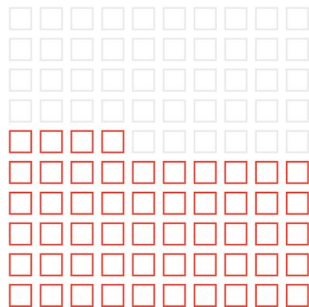
## 1. SUPPORT

# HERE'S WHAT YOUTUBE INFLUENCERS ARE SAYING...

Across the top 100 dash cam review videos on YouTube, influencers are prioritizing onboard features that allow for advanced support as a second pair of eyes, from nighttime vision to motion detection.

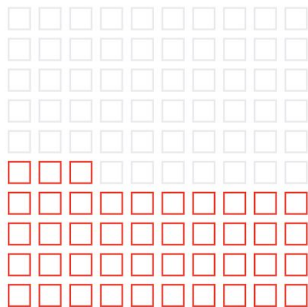
### YouTube – WHAT IS BEING SAID IN THE TOP 100 REVIEW VIDEOS FOR DASH CAMS

54%



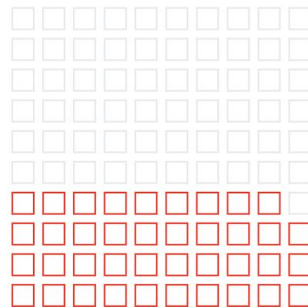
**AUTOMATIC**

43%



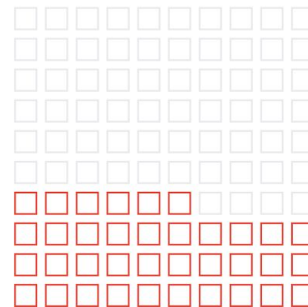
**VIDEO QUALITY**

39%



**DETECTION**

36%



**NIGHTTIME**

## 2. SURVEILLANCE

### CONSUMERS WANT PEACE OF MIND IN CASE OF INCIDENT

Just as consumers use security cameras to protect their homes, consumers across all three markets are demonstrating strong intent to use onboard cameras for security and surveillance of their cars.

What this tells us is that the car alarm is no longer enough - consumers are bolstering surveillance with onboard cameras, to monitor their cars from afar and capture evidence.

How might auto manufacturers continue to evolve security systems and services for vehicles to enhance driver peace of mind?

Top associated dash cam benefits by market (ranked by volume)

#### US

##### **car security camera**

spy camera for car  
car surveillance camera  
hidden car surveillance camera  
hidden car camera with audio  
hidden camera for car interior  
car security camera vandalism  
parked car security camera

#### DE

##### **kamera fürs auto überwachung (camera for car monitoring)**

dashcam parküberwachung  
(dash cam parking monitor)  
dashcam beweismittel  
(dash cam evidence)  
dashcam parkplatzüberwachung  
(dash cam parking surveillance)  
kamera im auto gegen vandalismus  
(camera in the car against vandalism)

#### JP

##### **ドライブ レコーダー 駐車 監視 (drive recorder parking monitoring)**

ドライブ レコーダー 事故  
(drive recorder accident)  
ドライブ レコーダー 安全 運転 支援  
(drive recorder safe driving support)  
ドライブ レコーダー 当て逃げ  
(drive recorder hit-and-run)  
ドライブ レコーダー 補助 金  
(drive recorder subsidies)

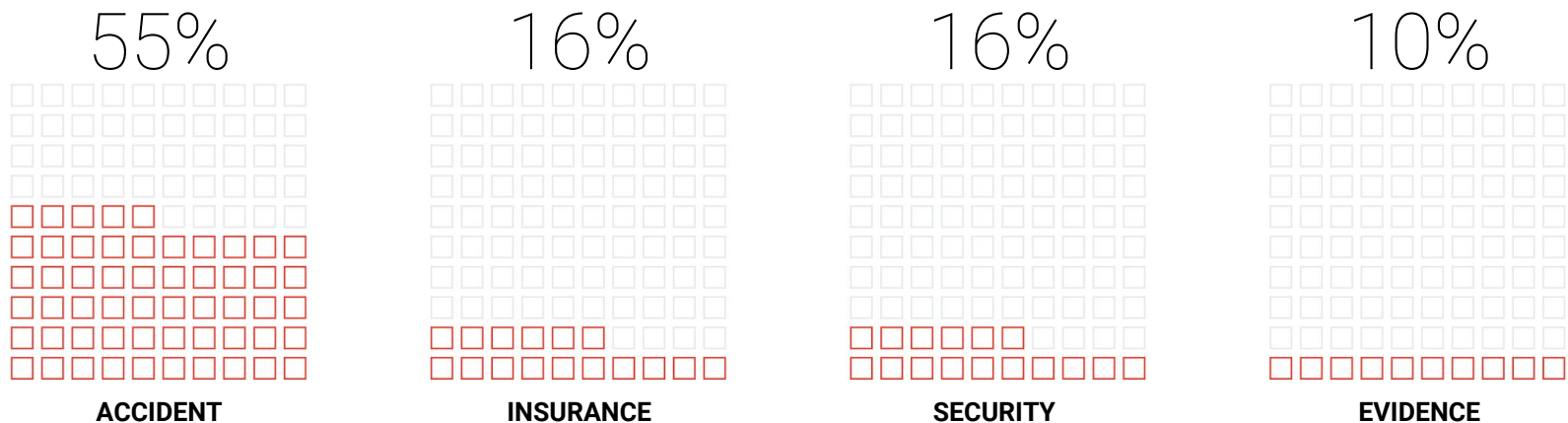
## 2. SURVEILLANCE

### HERE'S WHAT YOUTUBE INFLUENCERS ARE SAYING...

When describing the benefits of purchasing onboard cameras, influencers are most likely to discuss usage situations such as accidents, insurance, security and gathering evidence. Influencers are recommending onboard cameras to

users as a way to acquire proof in case an accident or other incident occurs in or around a car, where evidence for insurance and security purposes is required.

#### YouTube – WHAT IS BEING SAID IN THE TOP 100 REVIEW VIDEOS FOR DASH CAMS





**OPPORTUNITIES TO  
CONSIDER FROM THE  
ONBOARD CAMERA TREND**

**Consumers feel supported on the road with a second set of eyes. On-board cameras provide that extra support for them with driving safety features.**

Cameras are currently used for backing up and parking. How else might extended vision enable consumers to drive more confidently?

---

**Consumers want protection, as well as proof, in case of incident. On-board cameras act as a reliable source for capturing evidence.**

How might auto manufacturers continue to evolve security systems and services for vehicles, to enhance driver peace of mind during moments of need or distress?



## **NEW SOLUTIONS TO AGE OLD NEEDS**

With this investigation, we set out to understand, from a consumer lens, what are growing opportunities for OEMs to consider in enhancing the experience of driving today, as well as tomorrow.

What we ultimately uncovered through it, is that new technologies, such as the onboard camera, are actually meeting age old needs - the need for safety and protection- but they are doing so with new solutions. As consumers adopt and embrace these new solutions into their lives, and into their cars, it is changing their behaviors and their expectations for what it means to have an enhanced driving experience. It's important for automakers to understand this today, to be poised for success tomorrow.

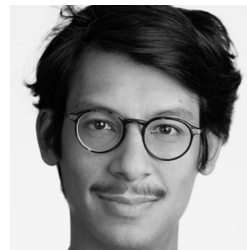


## CONTACTS



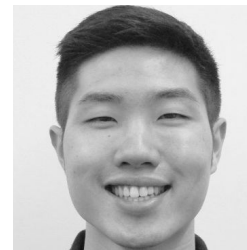
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THANK YOU

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THANK YOU!