

## PRESS RELEASE

### FOCUS ON THE MOTORHOME INDUSTRY

## Connectivity as a crucial, value-adding factor

**Bad Waldsee, 25 August 2017 – The market for motorhomes and caravans in Europe is booming: by 2025, a total sales volume of 200,000 units is expected. According to the findings of a recent, Europe-wide market survey carried out by Hymer GmbH & Co. KG and the Center of Automotive Management as part of the Erwin Hymer Group Research Programme, in addition to rising sales figures, turnover in the area of vehicle connectivity will triple from around 100 million euros at present to just under 300 million euros. A poll of motorhome enthusiasts and potential customers also revealed that there's a considerable amount of interest in operating concepts and driver assistance systems, and people would accept one-off payments and monthly fees for such features.**

Hymer GmbH & Co. KG, one of the leading manufacturers in the premium segment, sees great potential for added value in connectivity functions and services for the future, and is focusing on customer-oriented connectivity solutions. That's why the company has carried out a market survey in collaboration with the Center of Automotive Management, looking into both key trends as well as the interests of consumers. Central to the studies were the three most important connectivity technology fields: "Interface and interconnectivity", "Driver assistance systems and driverless cars" as well as various mobility services. The findings from all the segments researched reveals that, "The business model will change significantly in the next ten years. As a result, the sale of software components and interconnected (mobility) services will grow in importance and account for more of the added value," explains Professor Stefan Bratzel, Director of the CAM, who led the survey. "In-depth knowledge of customers, appropriate interfaces and interconnected value-added services for a wide-ranging customer experience is the key factor to success in the future," adds Professor Bratzel.

### Potential for growth in the European market for motorhomes

In the course of the market survey, the "Interface and interconnectivity" field is predicted to have the largest market shares in the connectivity areas of the future. This is due to navigation systems featuring online connectivity, mobile operating functions using a smartphone, voice and gesture control, as well as entertainment services, for example.

It's predicted that turnover in this field will increase from 80 million euros at present to 210 million euros in 2025. In line with this, the experts at the CAM believe that the

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order rates for networking capabilities will rise from 30 percent at present to at least 50 percent in 2025.

The driver assistance systems' segment also has significant potential for growth: turnover here will increase sixfold from 8 million euros today to 48 million euros in 2025. Mobility services relating to travel planning and execution, as well as for rental and sharing options, will grow in importance as well. Whilst they account for 14 million euros today, in just eight years it's anticipated to be over 40 million euros.

### **Consumers open to new operating concepts**

A poll of consumers, carried out by the renowned market research institute YouGov, as part of the market survey reveals that motorhome enthusiasts and potential customers are very open to the idea of connectivity functions and new services, particularly when it comes to different operating concepts. Firstly, the 350 people surveyed regard operating functions that are convenient and highly useful as real added value. This includes the mobile control of standard functions, which 81% of those surveyed believe is important or very important, as well as Internet access in the motorhome (77%), the automatic transfer of the route to the navigation system (68%), a camping ground database with the option to make reservations (65%) or the remote control of vehicle functions, such as locking, air conditioning or lighting (59%). Reading out vehicle information using a mobile device is also seen as important by 59%.

For consumers, when it comes to safety, receiving an alert on their smartphone in the event of a gas leak is essential (88%), as is vehicle positioning using GPS (74%), the mobile control of the alarm system (72%) and the mobile locking/unlocking of the vehicle (65%).

In the "Driver assistance systems and driverless cars" technology field, safety aspects have high approval ratings in all areas of the motorhome. These include reversing and all-round camera systems (87%), congestion warning in real time (84%), lane change and departure warning systems (75%), the use of adaptive cruise control (71%) or a highway pilot (53%). Convenient features such as a touchscreen as the command centre or voice control are important for around 50% of those surveyed.

### **Willingness of customers to pay for optional extras**

Customers expect some of the networking capabilities and services to be part of the standard equipment. Around one third would even be prepared to pay a monthly fee

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for them. For a safety-based driver assistance package with a lane departure warning system and lane change assist, the willingness of those surveyed to pay ranges from a one-off investment of 500 euros (67%) up to 1,500 euros (23%). For a “highway pilot”, 31% would even spend 2,000 euros.

“At HYMER, we’ve recognised the potential and are aware of the growing demand from customers. That’s why we’ve been working on developing various connectivity functions for a number of years now. At this year’s Caravan Salon in Düsseldorf, we’re also presenting innovative approaches to vehicle networking and control in an Innovation Lab,” says Bernhard Kibler, Managing Director of HYMER.

### **About the market survey**

Together with the Center of Automotive Management, Hymer GmbH & Co. KG has carried out a three-stage market survey. The first stage was an expert workshop, which aimed to formulate the aims and survey questions. In the second stage, the connected car trends were analysed and corresponding conclusions were drawn for the motorhome market. The basis for this was formed by the CAM’s innovation database, which records the latest developments from car manufacturers, relevant connected car studies as well as in-depth interviews with selected users. In the third stage, a poll of motorhome customers and potential customers was conducted.

For more information, visit [www.hymer.com](http://www.hymer.com)

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A wide range of press releases and high-resolution images can be found [here](#).  
HYMER on Facebook: [www.facebook.com/hymer.reisen.im.original](https://www.facebook.com/hymer.reisen.im.original)

### **About HYMER**

Since its foundation in 1957, HYMER has been a household name in motorhomes and caravans “Made in Germany”. The company is not only notable for its long tradition and passion for motorhoming, but is also one of the leading manufacturers in the premium sector thanks to its high standards of quality and consistent record of innovation. Hymer GmbH & Co. KG markets its products under the four brands of HYMER Motorhomes, ERIBA Caravans, HYMERCAR Camper Vans and HYMER Original Parts & Accessories. Hymer GmbH & Co. KG is part of the Erwin Hymer Group.

### **About the Erwin Hymer Group**

The Erwin Hymer Group brings together motorhome and caravan manufacturers, accessory specialists as well as rental and financing services under one roof. With more than 6,000 employees worldwide and around 55,000 leisure vehicles, the Group achieved a turnover of 2.1 billion euros in the 2016/17 business year. The Erwin Hymer Group includes the motorhome and caravan brands American Fastbacks, Buccaneer, Bürstner, Carado, Cliffride, Compass, Dethleffs, Elddis, Eriba, Etrusco, Hymer, Niesmann+Bischoff, Laika, LMC, Roadtrek, Sunlight and Xplore, the motorhome rental companies Best Time RV, McRent and rent easy, the chassis specialist Goldschmitt, the accessory specialist Movera, the tent caravan manufacturer 3DOG camping and the travel portal freeontour.

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