THE GLOBAL AUTOMOTIVE TRENDS REPORT
SCOPE & METHODOLOGY

ONLINE SURVEY: THE WORLD CAR EXPERT PANEL

102 WORLD CAR JURORS FROM 34 MARKETS

Next Level Consumer & Communication Insights

THE HOLISTIC, COMPREHENSIVE AND CUSTOMIZED APPROACH TO COMMUNICATION AND CONSUMER RESEARCH GIVES AITASTIC CLIENTS A COMPETITIVE ADVANTAGE IN A RAPIDLY CHANGING AND INCREASINGLY COMPLEX COMMUNICATIONS AND BUSINESS ENVIRONMENT.

GLOBA L
UNIQUE DATA FOR MORE THAN 50 MARKETS

>50k | >10m PANEL

TRAD. & SOCIAL
SOURCES IN-DEPTH AI-ANALYSED

FULLY INTEGRATED CROSS CHANNEL METRICS AND INSIGHTS

NEAR REAL-TIME
KPIs AND OPERATIONAL DATA 24/7 IN NEAR REAL-TIME
TRENDING AUTOMOTIVE TOPICS 2022

THE ELECTRIFICATION-TREND CONTINUES: AUTOMOTIVE JOURNALISTS EXPECT BATTERY ELECTRIC VEHICLES AS THE #1 AUTOMOTIVE TOPIC FOR 2022

How important are the following automotive trends for the year to come?
(Expert-survey: September 2021)

VERY IMPORTANT

#1 BATTERY ELECTRIC VEHICLES

EFFICIENCY

SAFETY

QUALITY

INTERIORS, INFTAINMENT & CONNECTIVITY

BUDGET CARS / AFFORDABILITY

SUSTAINABILITY & RECYCLING

SUPPLY CHAIN

LIGHTWEIGHT MATERIALS

SYNTHETIC FUELS

FUEL CELL TECHNOLOGY

COOPERATIONS AND ALLIANCES

AUTONOMOUS DRIVING

SHARED MOBILITY / MOBILITY AS A SERVICE

NOT IMPORTANT
ELECTRIFICATION
What are the most promising powertrain options regarding e-mobility?
(Expert-survey: September 2021)
Battery Electric Vehicles are expected to play a key role in future mobility – yet, the challenges haven’t changed over the last 7 years.

How much will the following factors influence the roll-out and success of Battery Electric Vehicles?

(Expert-survey: September 2021)

1. **Advanced Battery Technologies**
2. **Improved Charging Infrastructure**
3. **Lower Purchasing Costs**

>> Stable key challenges over the last 7 years!
For the first time ever, synthetic fuels overtake fossil-fuels. Carbon dioxide taxations, carbon emission targets and raising carbon footprint awareness among consumers weakens outlook of fossil fuels as an energy source for future mobility.

While batteries are clearly perceived as the #1 energy source for future mobility, hydrogen and synthetic fuels gain attractiveness over the last year.
BATTERIES ARE RATED AS #1 ENERGY-SOURCE FOR FUTURE MOBILITY. STRONG DYNAMICS FOR HYDROGEN IN KOREA AND CHINA – CONTRARY TO EUROPE

How would you rate the prospects of the following energy-sources for future mobility?

(Expert-survey: September 2021)
How would you rate the prospects of the following energy-sources for future mobility?
(Expert-survey: September 2021)

**PETROL**
- South America: Very Good
- North America: Very Good
- Europe: Not Good
- Africa & ME: Very Good
- APAC: Very Good

**DIESEL**
- South America: Very Good
- North America: Very Good
- Europe: Not Good
- Africa & ME: Very Good
- APAC: Very Good

**NOTICE**
- Europe is most skeptical

**Critical Outlook for Diesel in Key Markets**
SYNTHETIC FUELS PERCEIVED AS VIABLE ALTERNATIVE TO FOSSIL FUELS ACROSS ALL MARKETS, DESPITE POTENTIALLY LOW ENERGY-EFFICIENCY

How would you rate the prospects of the following energy-sources for future mobility?

(Expert-survey: September 2021)
Enery-Sources for Future Mobility

CNG and E85 Ethanol with a Bad Reputation Across All Markets – Particularly Critical Perception in Europe

- Natural Gas (CNG)
  - South America: Very Good
  - North America: Very Good
  - Europe: Dark Outlook Cross Most Markets
  - Africa & ME: Not Good
  - APAC: Not Good

- Ethanol (E85)
  - South America: Dark Outlook
  - North America: Dark Outlook
  - Europe: Dark Outlook Cross Most Markets
  - Africa & ME: Dark Outlook
  - APAC: Dark Outlook

How would you rate the prospects of the following energy-sources for future mobility?
(Expert-survey: September 2021)
DRIVER-ASSISTANCE & AUTONOMOUS DRIVING
How important are the following automotive trends for the year to come?

(Expert survey: September 2021)
How important are ADVANCED DRIVER-ASSISTANCE SYSTEMS & AUTONOMOUS DRIVING for the year to come?

(Expert survey: September 2021)
ANY FORM OF DRIVER ASSISTANCE IS MORE DESIRABLE THAN NO ASSISTANCE. DEGREE OF AUTONOMY: HIGHLY AUTOMATED LEVEL 4 MOST DESIRABLE

**LEVEL 0**
Driver only
(Automated system: no vehicle control)

**LEVEL 1**
Driver Assistance
(Driver must be ready to take control at anytime)

**LEVEL 2**
Partial Automation
(Driver responds if the automated system fails)

**LEVEL 3**
Conditional Automation
(Within limited environments, driver can safely turn their attention away from driving tasks)

**LEVEL 4**
High Automation
(Automated system in control except certain events such as severe weather)

**LEVEL 5**
Full Automation
(No driver intervention required after setting destination and starting the system)

How desirable are the following degrees of autonomy from your point of view?
(Expert survey: September 2021)
AUTONOMOUS DRIVING
SAFETY & SYSTEM RELIABILITY IS KEY TO SUCCESS OF AUTONOMOUS DRIVING

How important are the following aspects to enable autonomous driving?

(Expert-survey: September 2021)

#1 SAFETY & SYSTEM RELIABILITY

- Legislation (on regional & national level)
- Sensor hardware (radars, lasers, etc.)
- Infrastructure
- Advancements in artificial intelligence
- Consumer acceptance
- Car-to-car and car-to-x communications (incl. industry standards)
- Data security
- Ethics (e.g. system decision in crash situation)
- Affordability: extra costs
- New players (e.g. Waymo, Mobileye, etc.)
- New business models & scenarios (e.g. car sharing)
INTEIORS, INFOTAINMENT & CONNECTIVITY
How important are the following automotive trends for the year to come?

(Expert survey: September 2021)
Which companies / sectors will be the key drivers for the “digital car”?

(Expert-survey: September 2021)
Here is a list of base functionalities of infotainment systems. How important and desirable are the following aspects from your point of view?
(Expert-survey: September 2021)

“Most still try to achieve something that smartphones succeeded at a decade ago: **USABILITY**.”

1. **Ease of Use / Intuitive Operation / Simplicity**
2. System-Stability and Reliability
3. Speed of System
4. Data Privacy and Security
5. Boot / Load Time of Infotainment
6. Vehicle Smartphone-Apps and Remote Services
7. Remote Software Updates
SMARTPHONE INTEGRATION VIA ANDROID AUTO / APPLE CARPLAY RATED AS MOST IMPORTANT INFOTAINMENT FEATURE

Here is a list of infotainment features. How important and desirable are the following features from your point of view?
(Expert-survey: September 2021)

#1 SMARTPHONE INTEGRATION THROUGH ANDROID AUTO / APPLE CARPLAY

#2 NAVIGATION SYSTEM (E.G. ALSO FOR SAFETY INTERACTION WITH PREDICTIVE ROUTE-DATA, POSITION-RELATED INFORMATION SYSTEMS, RANGE AND EFFICIENCY OPTIMISATION)

#3 FAST INTERNET CONNECTION (E.G. 5G)

#4 PERSONALISATION THROUGH LEARNING ALGORITHMS AND CONTEXT AWARENESS

#5 SMARTPHONE INTEGRATION (NOT THROUGH ANDROID AUTO / APPLE CARPLAY)

#6 OPTION TO DISCONNECT (E.G. BUTTON THAT TURNS-OFF ALL CONNECTIVITY FEATURES)

#7 CONVERGING OF CONNECTED CAR AND SMART HOME

“Apple CarPlay & Android Auto - consumers prefer a familiar, simple experience that translates across devices.”

Very Important

SMARTPHONE INTEGRATION VIA ANDROID AUTO / APPLE CARPLAY

NAVIGATION SYSTEM (E.G. ALSO FOR SAFETY INTERACTION WITH PREDICTIVE ROUTE-DATA, POSITION-RELATED INFORMATION SYSTEMS, RANGE AND EFFICIENCY OPTIMISATION)

FAST INTERNET CONNECTION (E.G. 5G)

PERSONALISATION THROUGH LEARNING ALGORITHMS AND CONTEXT AWARENESS

OPTION TO DISCONNECT (E.G. BUTTON THAT TURNS-OFF ALL CONNECTIVITY FEATURES)

CONVERGING OF CONNECTED CAR AND SMART HOME

SMARTPHONE INTEGRATION (NOT THROUGH ANDROID AUTO / APPLE CARPLAY)
SURPRISE? THE TOUCHSCREEN IS EVALUATED (SLIGHTLY) BETTER THAN BUTTONS ON A GLOBAL SCALE. GESTURE CONTROL LEAST DESIRABLE.

Here is a list of human-machine interfaces. How important and desirable are the following approaches from your point of view?

(Expert survey: September 2021)
How important and desirable are the following approaches from your point of view?
(Expert survey: September 2021)
“It has become the fallacy of composition, where one leads with a certain screen, another follows and makes it bigger, and so on until everybody spends more for no evident benefit.”

When you think about in-car infotainment systems, which brands / manufacturers come first onto your mind and why?

(Expert-survey: September 2021)
Which brands / manufacturers lead in terms of infotainments & connectivity?
(Expert survey: September 2021)

- TESLA
- MERCEDES-BENZ
- POLESTAR (ANDROID AUTOMOTIVE OS)
- PORSCHE
- HYUNDAI MOTOR GROUP
- NEW PLAYERS: RIVIAN, NIO, XPENG, BYD ETC.
- FORD MOTOR COMPANY
- STELLANTIS (PSA, FCA)
- JAGUAR LAND ROVER
- GENERAL MOTORS
- VW GROUP
- GEELY AUTO GROUP (INCL. VOLVO CARS)

Which brands / manufacturers lag behind in terms of infotainments & connectivity?

- JAPANESE BRANDS & ALLIANCES
  - RENAULT-NISSAN-MITSUBISHI
  - HONDA
  - MAZDA
  - TOYOTA
**INFOTAINMENT & CONNECTIVITY**

**TESLA STILL PERCEIVED AS TREND-SETTING WITHIN THE AUTOMOTIVE INDUSTRY, CLOSELY FOLLOWED BY MERCEDES-BENZ WITH MBUX & HYPERSONSCREEN**

When you think about in-car infotainment systems, which brands / manufacturers come first onto your mind and why?

(Expert-survey: September 2021)

**TESLA** - new Model S seems to have moved the game forward again.”

“TESLA – because its large, feature-packed display still stands out in the industry.”

“TESLA, of course, because it conceives cars as phones.”

“TESLA, because they started the «no buttons» trend.”

**MERCEDES** – because it offers the most advanced solutions of any traditional automaker.”

“MERCEDES because of the fantastic MBUX system and the impressive Hyperscreen of the EQS.”

“MERCEDES, as its making waves with the latest versions of its MBUX interface and, more recently, the Hyperscreen.”

**MERCEDES-BENZ** – Not the easiest to use, but has a lot of capability, configurability, + an ultra-modern appearance.”

**BMW**: one of the best infotainment systems on the market, far developed compared to others, a perfect voice control, high degree of networking.”

“BMW best infotainment in sense of userfriendliness.”

“BMW. Always have new features but trying to stay conservative at the same time. No rush for changing things.”
When you think about in-car infotainment systems, which brands / manufacturers come first onto your mind and why? (Expert-survey: September 2021)

Chinese brands like **HAVAL** - because it has made full infotainment integration *(including Android Auto/Carplay)* standard across a range of affordable vehicles, while legacy brands still charge extra for it.*

**BAIDU, TENCENT, ALIBABA** - These 3 company's in-car infotainment systems are most popular here in China.*

**LI XIANG AUTO**. Because the system is very succinct and direct. All the operation was finished in one or two steps. It is also very ease to operate and lovely.*
WHAT'S NEXT?

WATCH EXPERT INTERVIEWS ABOUT THIS STUDY ON WORLD CAR TV
INTRODUCTION TO AITASTIC

Our true AI-solutions constantly monitor and analyze businesses, key trends, consumer-behavior and communication in all relevant markets.

Precise and relevant data are transformed and integrated in strategic analysis and insights.

Based on these insights and our sector expertise, our consultants provide guidance to successfully manage products and services, marketing and communication as well as developing successful management strategies to stay ahead in the ever changing future.

Al consumer & communication insights for better business decisions
THANK YOU!

WE MAKE A SIMPLE PROMISE
Our holistic, comprehensive and customized approach to communication research and consulting will give you a competitive advantage in a rapidly changing and increasingly complex communications environment.

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