Automotive Interior Survey 2021
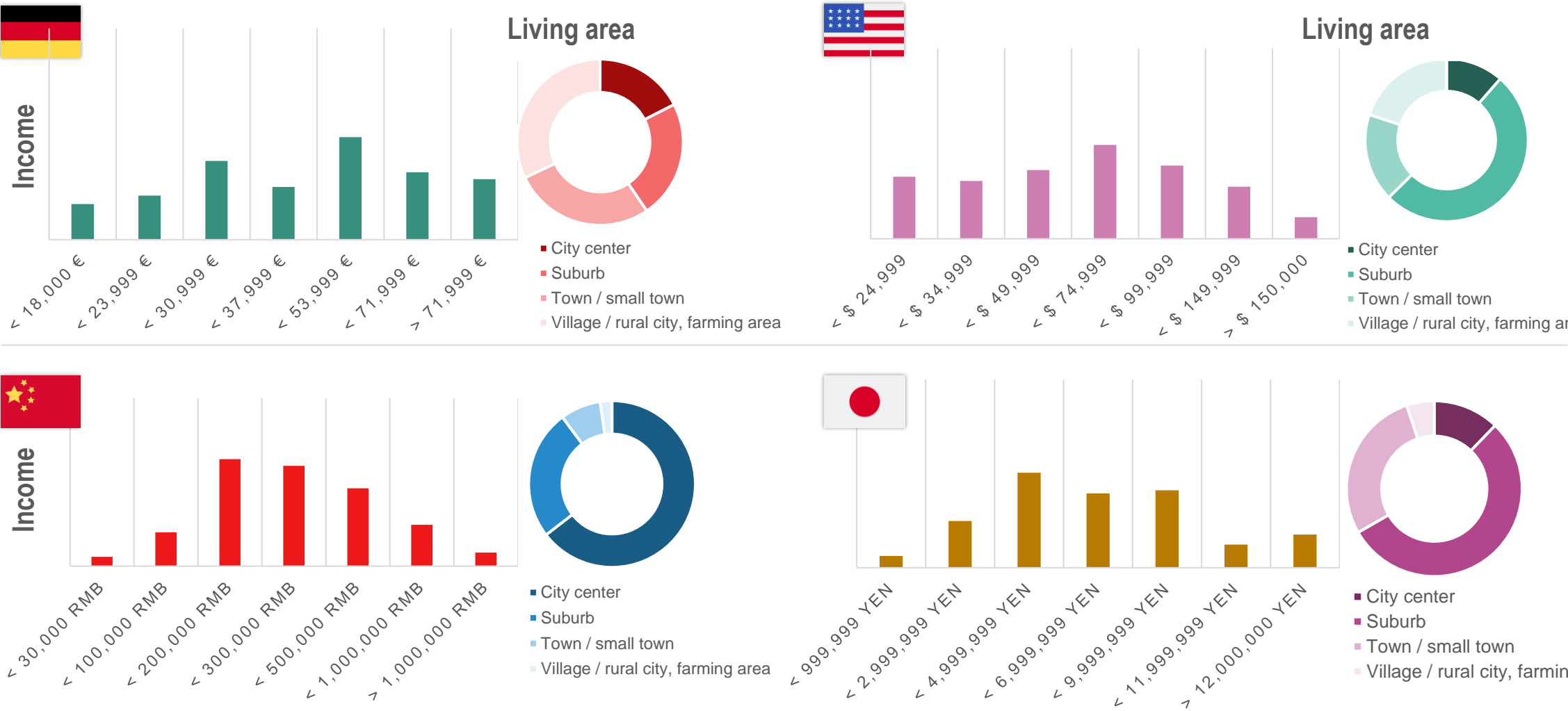
Conducted in December 2021

AsahiKASEI

| **STUDY BACKGROUND**	The objective of the study is to figure out the shifting trend of consumer behavior and preference, and to track customer car-buying behavior in a constantly changing environment. Special attention is drawn to topics such as the cleanliness and hygiene of the car, sustainability features, connectivity, car sharing interests, new in-vehicle feature concepts.
METHOD	**Online survey via online access panel**
MARKETS	**Germany, USA, China, Japan**
TARGET GROUP	Car drivers and decision makers for car purchase **n=4,013** (Germany: n=1,005; USA: n=1,004; CN: n=1,004; JP: n=1,000)
FIELD WORK	11/01/2021-11/12/2021

Car ownership & purchase behavior

Asahi**KASEI**

Total annual net income & demography

Living area

Income

< 18,000 €　< 23,999 €　< 30,999 €　< 37,999 €　< 53,999 €　< 71,999 €　> 71,999 €

- City center
- Suburb
- Town / small town
- Village / rural city, farming area

Living area

< $ 24,999　< $ 34,999　< $ 49,999　< $ 74,999　< $ 99,999　< $ 149,999　> $ 150,000

- City center
- Suburb
- Town / small town
- Village / rural city, farming area

Income

< 30,000 RMB　< 100,000 RMB　< 200,000 RMB　< 300,000 RMB　< 500,000 RMB　< 1,000,000 RMB　> 1,000,000 RMB

- City center
- Suburb
- Town / small town
- Village / rural city, farming area

< 999,999 YEN　< 2,999,999 YEN　< 4,999,999 YEN　< 6,999,999 YEN　< 9,999,999 YEN　< 11,999,999 YEN　> 12,000,000 YEN

- City center
- Suburb
- Town / small town
- Village / rural city, farming area

All: A.1. Are you …? | Single Choice | Base n$_{DE}$= 1004 | A.19. What is the total annual net income of all members of your household? Please also include onetime payments, pensions and any other income. | Single Choice | Base n$_{DE}$= 1005
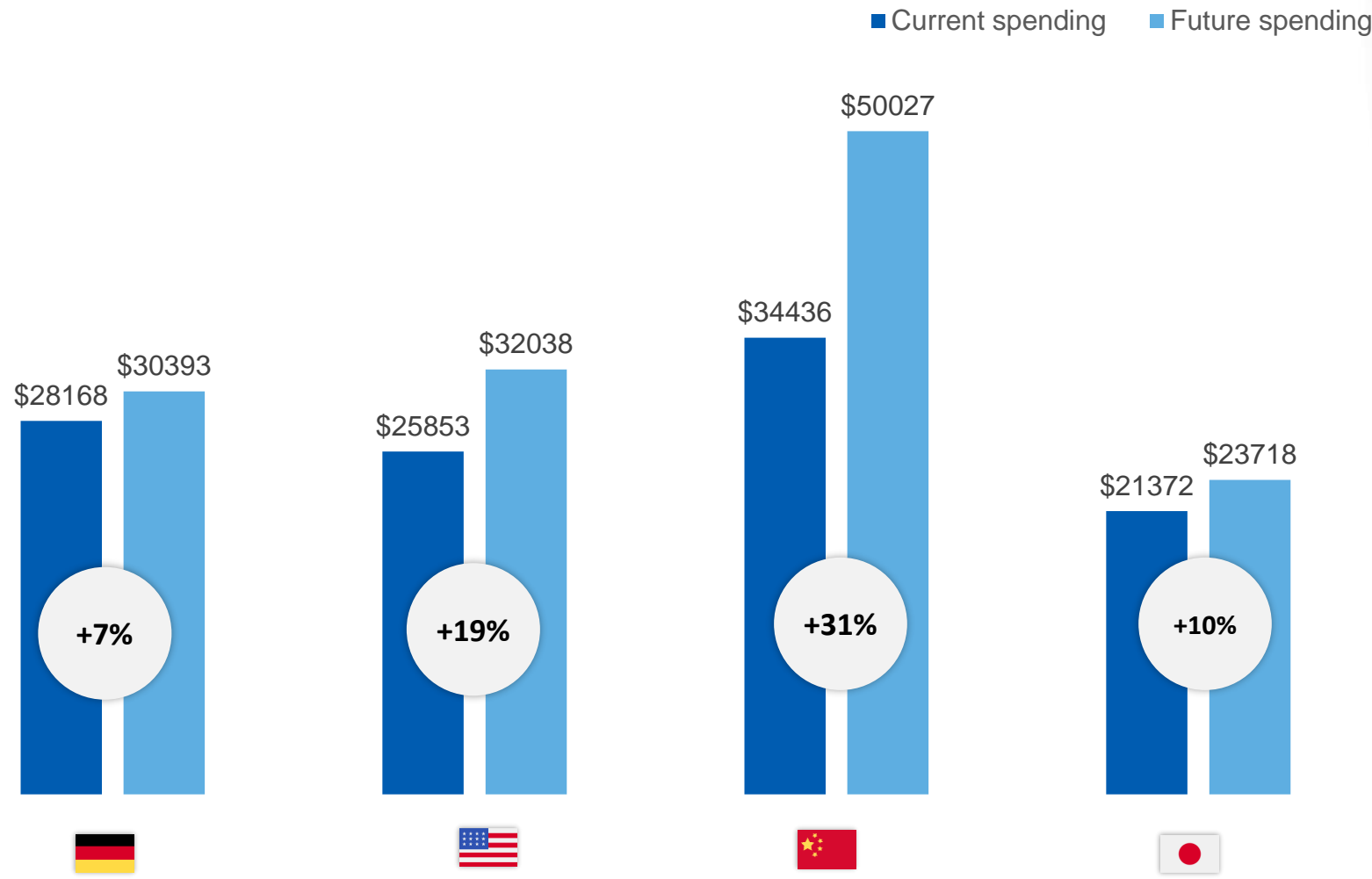
Asahi**KASEI**

Car users must be convinced to stay with their brand

Brand loyalty by region
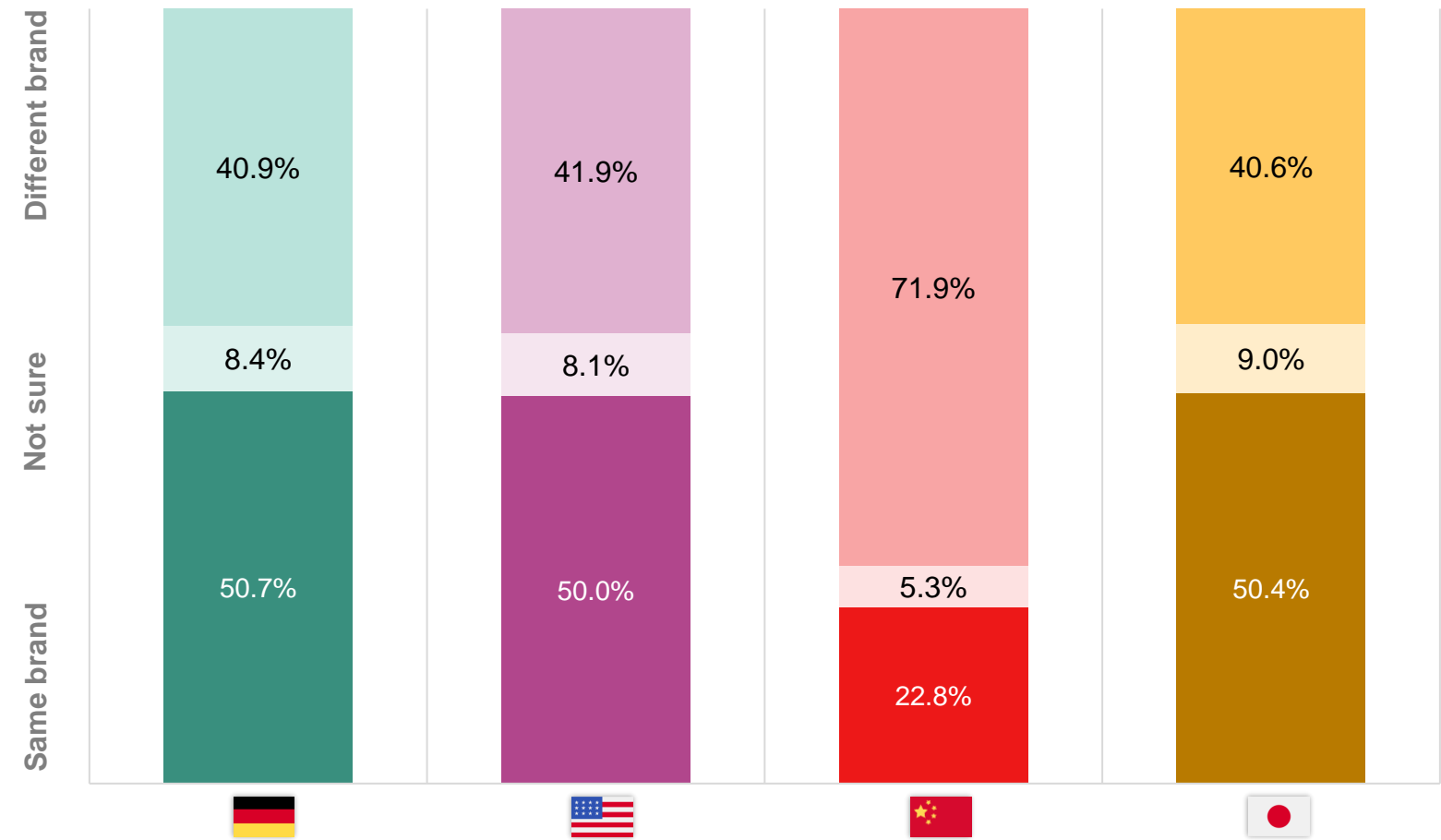
Filter: A.4. What brand does the car you personally use most frequently belong to?: A.12. You mentioned that the car you personally use most often is a {show brand from A.4}. When thinking about your next car: Which brand would you consider most?
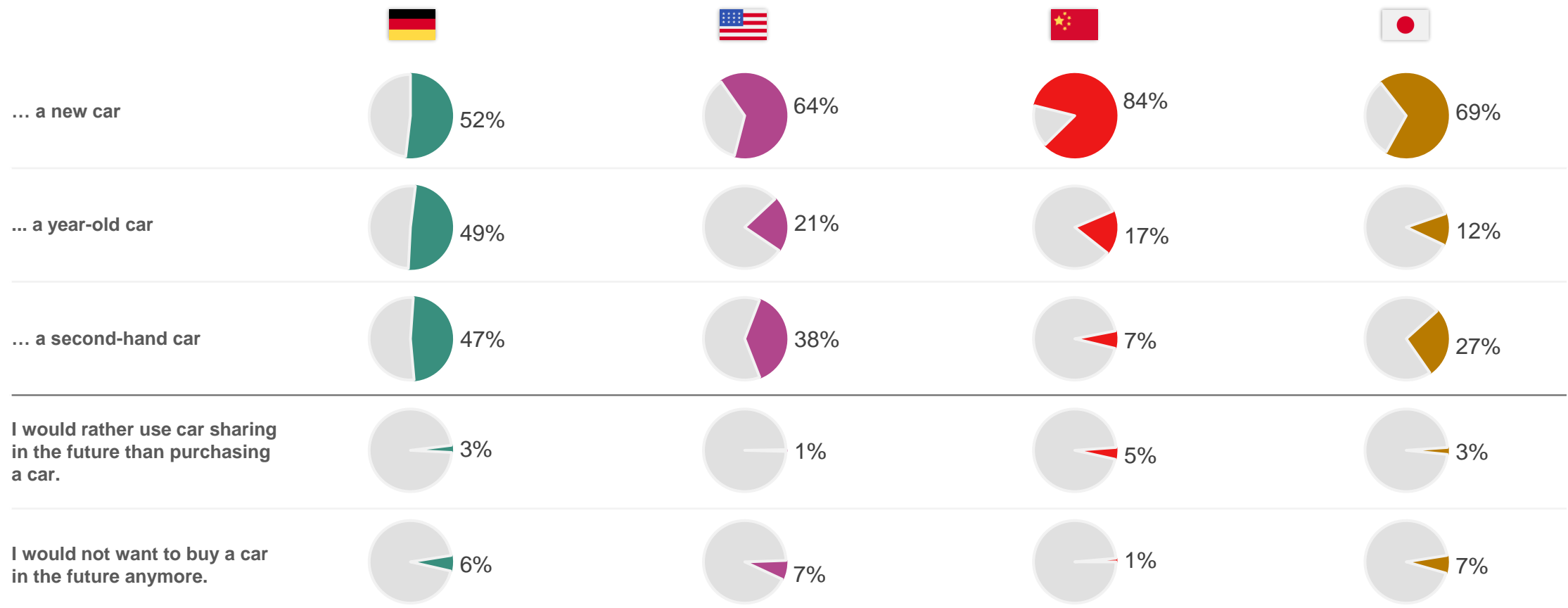
Asahi**KASEI**

Future vehicle spending will increase

■ Current spending   ■ Future spending

$50027

$34436

$32038

$30393

$28168

$25853

$23718

$21372

+7%   +19%   +31%   +10%

A.8. How much money have you spend on the vehicle you personally use most frequently? | Open question | Base: $n_{DE}=293$. $n_{US}=409$. $n_{CN}=670$. $n_{JP}=526$.
A.14. How much money would you spend on your next car in total? | Open question | Base: $n_{US}=425$, $n_{DE}=285$, $n_{CN}=671$, $n_{JP}=512$.

AsahiKASEI

Germans are least likely to buy a new car and Chinese are most likely to buy one. Very few will not purchase a car at all in the future.

**Future Car: Buy, finance or lease …**

	🇩🇪	🇺🇸	🇨🇳	🇯🇵
… a new car	52%	64%	84%	69%
… a year-old car	49%	21%	17%	12%
… a second-hand car	47%	38%	7%	27%
I would rather use car sharing in the future than purchasing a car.	3%	1%	5%	3%
I would not want to buy a car in the future anymore.	6%	7%	1%	7%

All: A.9. Which kind of purchase of a car could you personally imagine in the future? | Multiple Choice | Base: n_{DE}=1005. n_{US}=1004. n_{CN}=1004. n_{JP}=1000.

AsahiKASEI

Acceptance of car sharing/rental varying

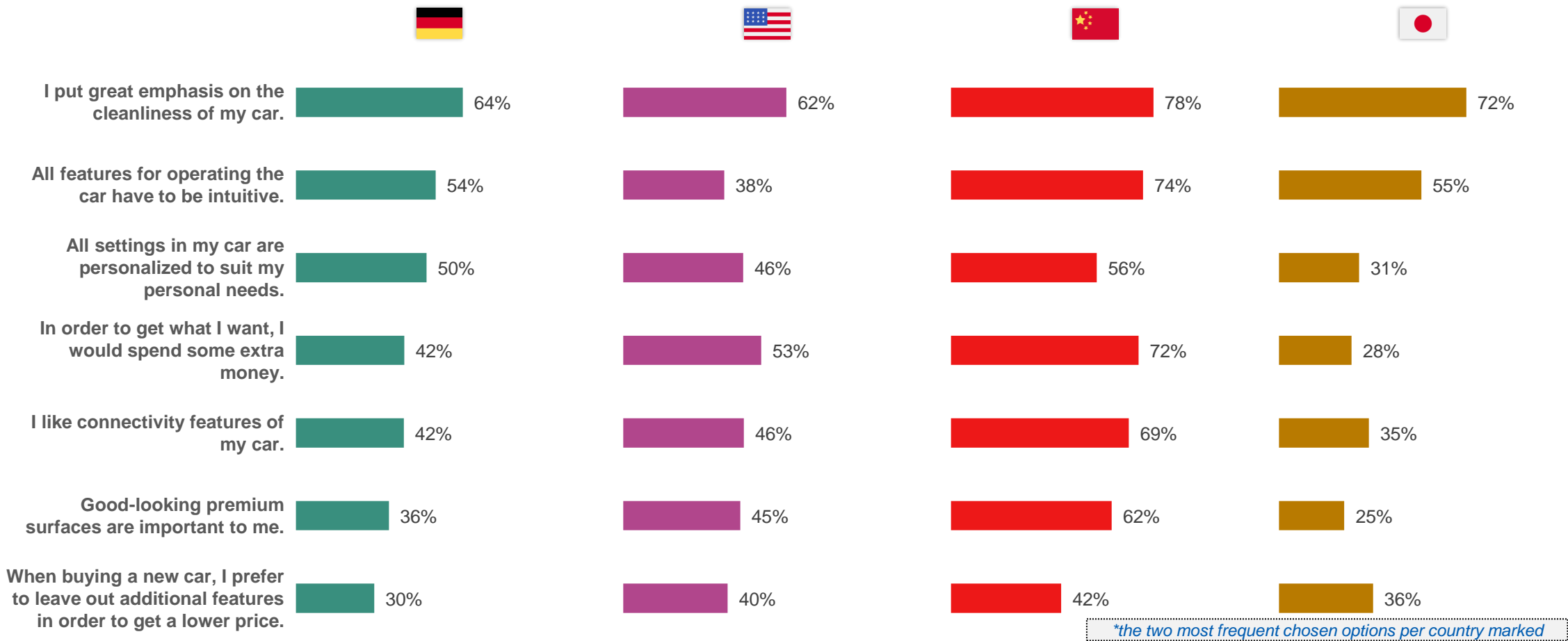**Commercial car sharing or car rental in the future**
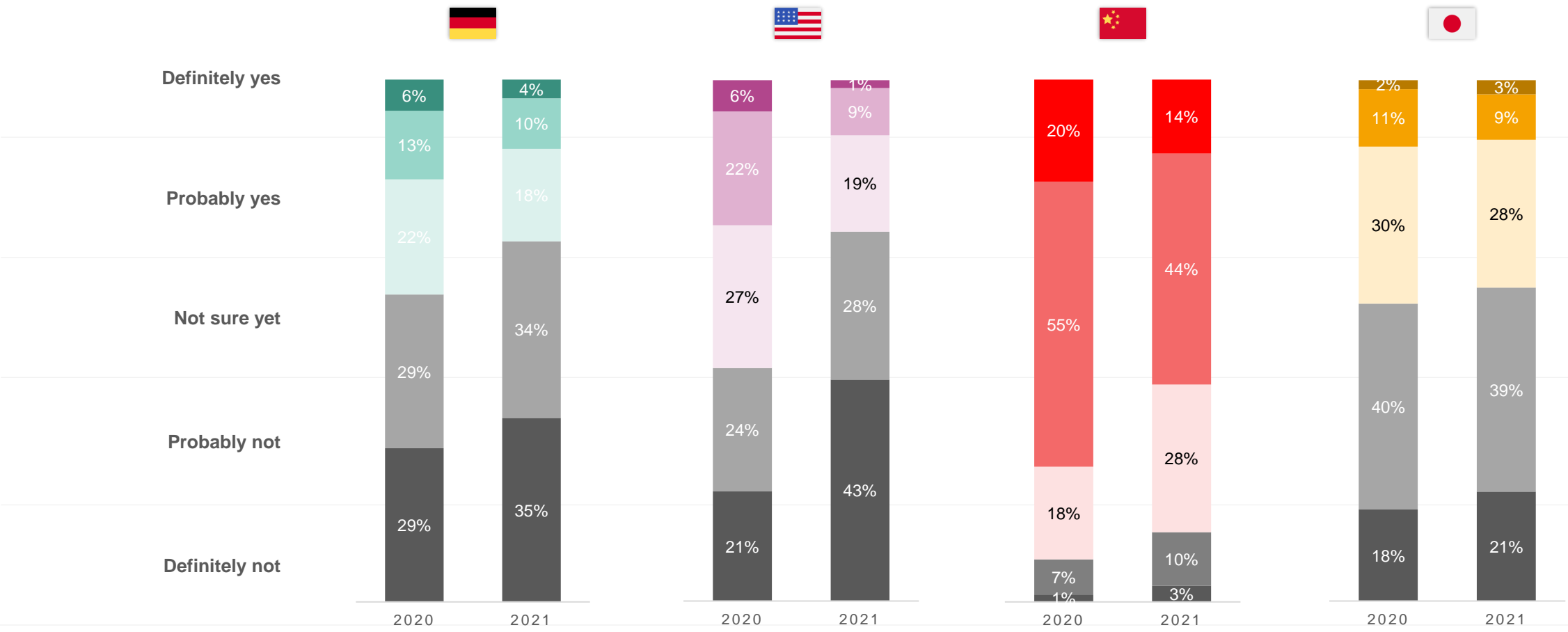
All: A.9. Can you imagine using commercial car sharing or car rental in the near future? | Single Choice | Base: n_{DE}=1062. n_{US}=1051. n_{CN}=1127. n_{JP}=1009. When <=3%, data label not shown.

Cleanliness in the car

AsahiKASEI

# Cleanliness of the car is very important in all countries

Statements about the current car (Top2)

	🇩🇪	🇺🇸	🇨🇳	🇯🇵
I put great emphasis on the cleanliness of my car.	64%	62%	78%	72%
All features for operating the car have to be intuitive.	54%	38%	74%	55%
All settings in my car are personalized to suit my personal needs.	50%	46%	56%	31%
In order to get what I want, I would spend some extra money.	42%	53%	72%	28%
I like connectivity features of my car.	42%	46%	69%	35%
Good-looking premium surfaces are important to me.	36%	45%	62%	25%
When buying a new car, I prefer to leave out additional features in order to get a lower price.	30%	40%	42%	36%

the two most frequent chosen options per country marked

Filter: A.3. Car used: C.1. Please indicate to what extent you agree with the following statements regarding the car you are using the most. | Matrix | Scale 1 "Do not agree at all" to 5 "Totally agree" | Base: n_{DE}=996. n_{US}=1001. n_{CN}=956. n_{JP}=991.

Perception of cleanliness differing among regions

Cleanliness in and around the vehicle is perceived and evaluated differently by the regions.
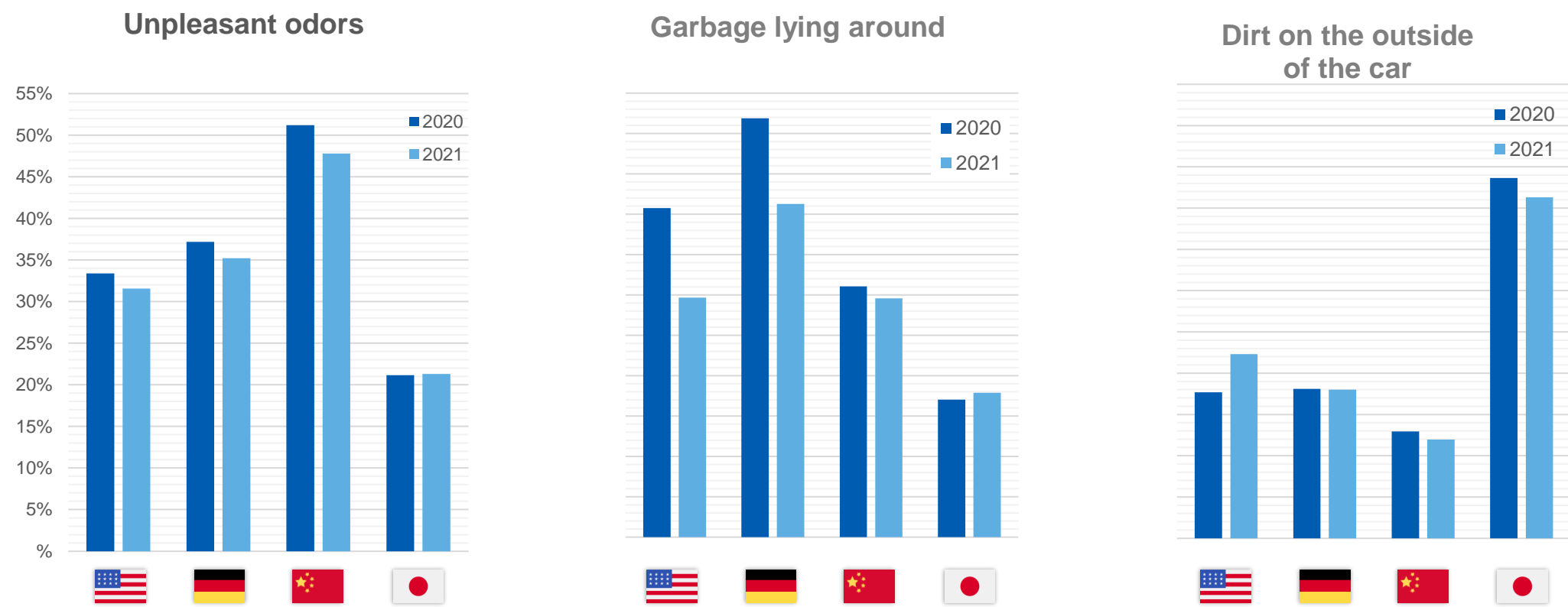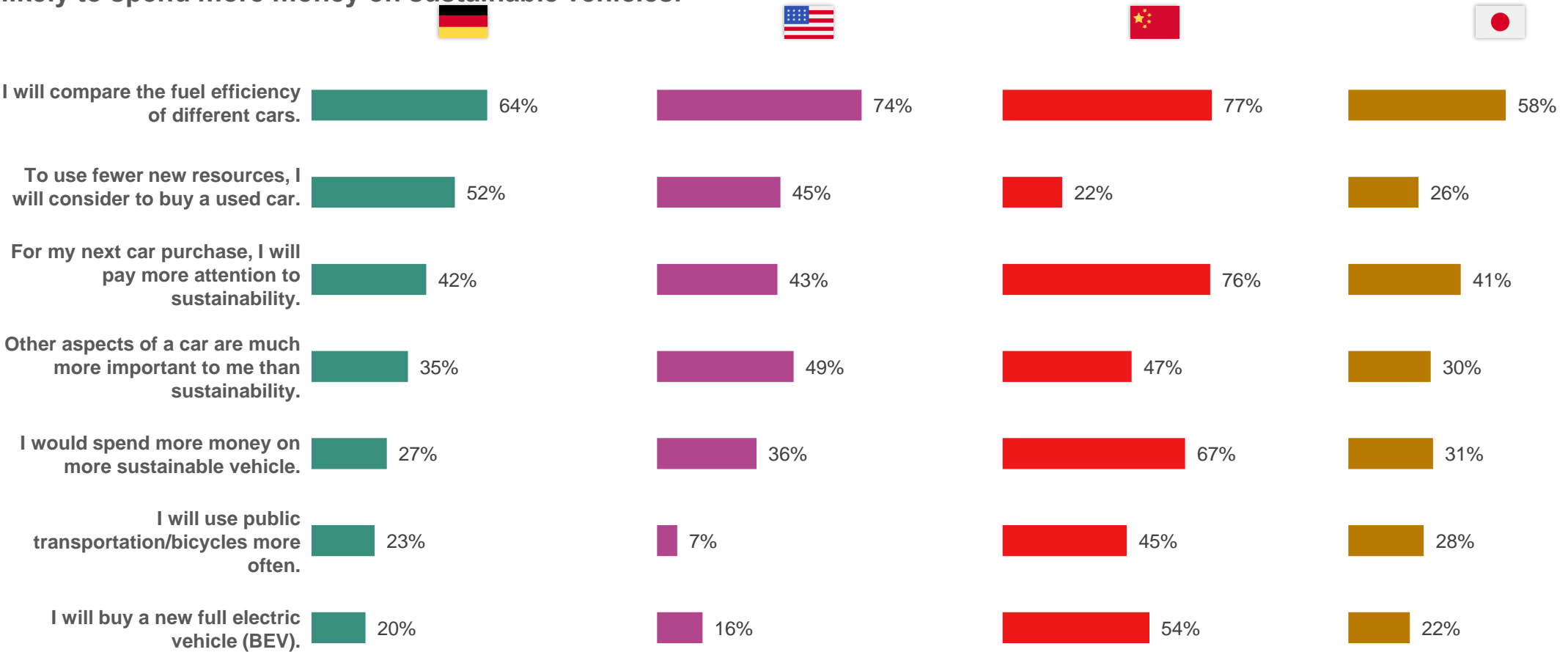

Unpleasant odors

Garbage lying around

Dirt on the outside of the car

Interests in sustainable vehicles

AsahiKASEI

Aspects regarding sustainability for next car

The majority of the participants from all countries are likely to compare the fuel efficiency for their next cars. Chinese are likely to spend more money on sustainable vehicles.
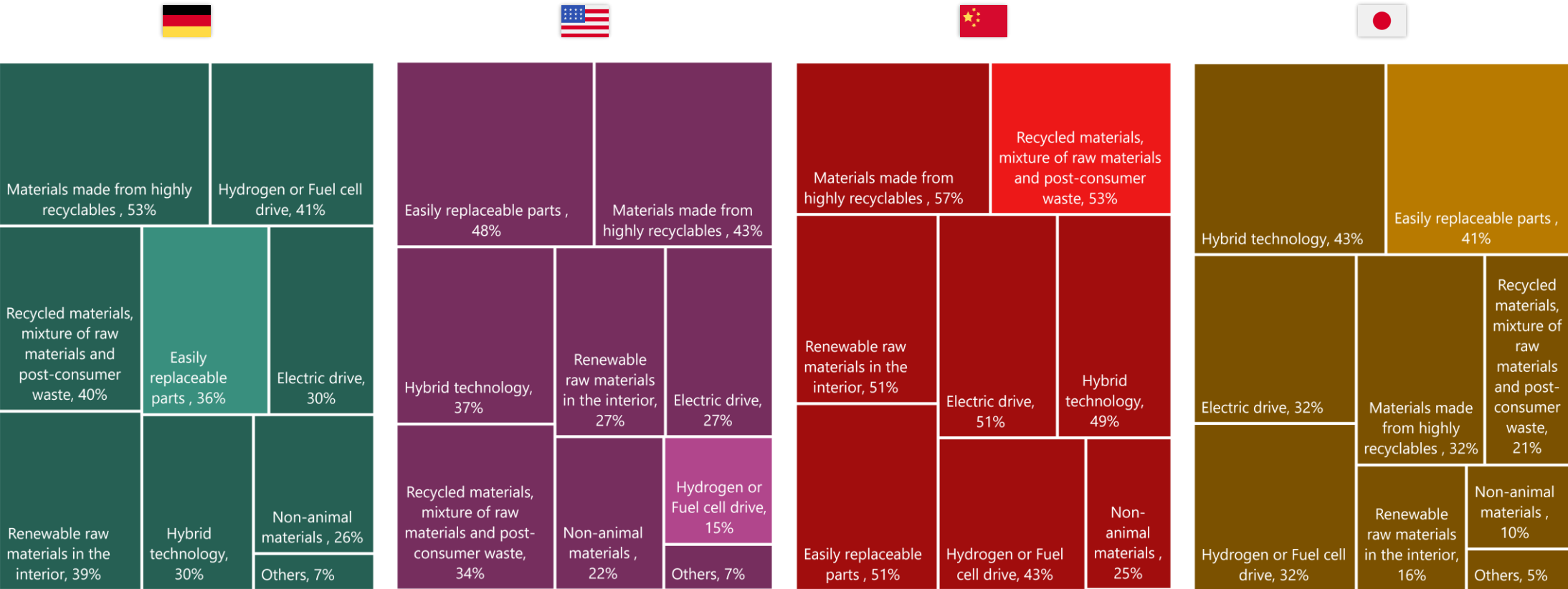
	🇩🇪	🇺🇸	🇨🇳	🇯🇵
I will compare the fuel efficiency of different cars.	64%	74%	77%	58%
To use fewer new resources, I will consider to buy a used car.	52%	45%	22%	26%
For my next car purchase, I will pay more attention to sustainability.	42%	43%	76%	41%
Other aspects of a car are much more important to me than sustainability.	35%	49%	47%	30%
I would spend more money on more sustainable vehicle.	27%	36%	67%	31%
I will use public transportation/bicycles more often.	23%	7%	45%	28%
I will buy a new full electric vehicle (BEV).	20%	16%	54%	22%

Filter A.9. Future car purchase intended: B.6. To what extend do you agree or disagree with the following statements regarding sustainability when purchasing your next car? | Matrix | Scale from 1 "Do not agree at all" to 5 "Totally agree" | Base: n_{DE}=841-882. n_{US}=848-895. n_{CN}=910-930. n_{JP}=752-836.

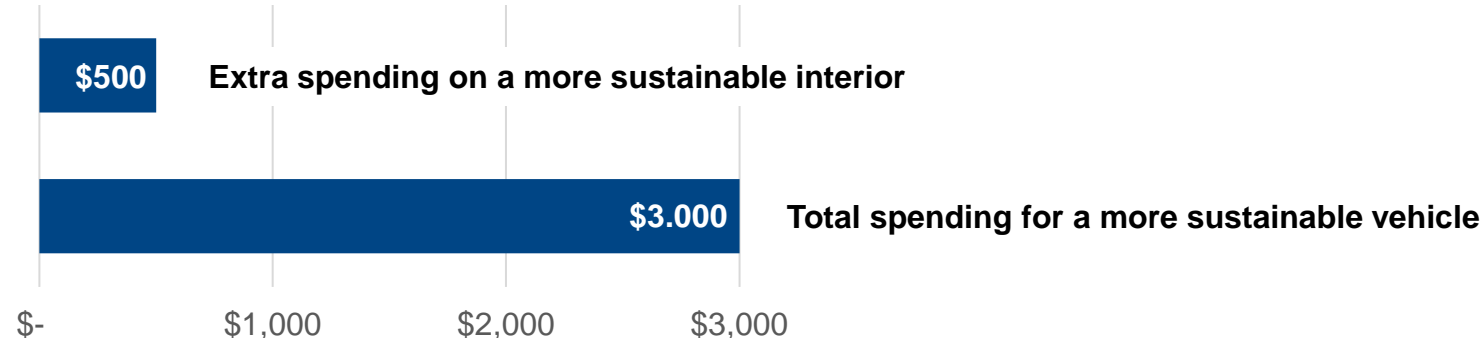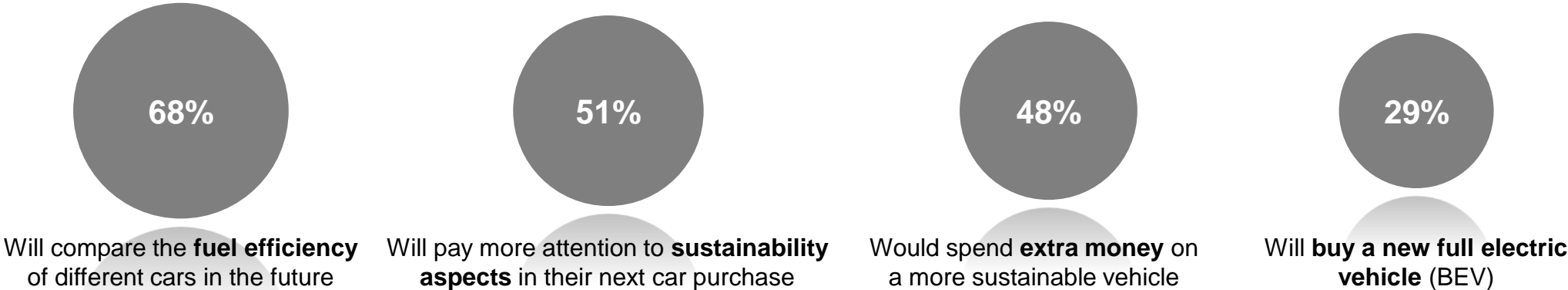*the three most frequent chosen options per country marked*

Asahi**KASEI**

Aspects of sustainable vehicles

In DE, the US, and CN, slightly over/below a half consider "materials made from high recyclables" characterize a sustainable vehicle.

Germany

- Materials made from highly recyclables, 53%
- Hydrogen or Fuel cell drive, 41%
- Recycled materials, mixture of raw materials and post-consumer waste, 40%
- Easily replaceable parts, 36%
- Electric drive, 30%
- Renewable raw materials in the interior, 39%
- Hybrid technology, 30%
- Non-animal materials, 26%
- Others, 7%

US

- Easily replaceable parts, 48%
- Materials made from highly recyclables, 43%
- Hybrid technology, 37%
- Renewable raw materials in the interior, 27%
- Electric drive, 27%
- Recycled materials, mixture of raw materials and post-consumer waste, 34%
- Non-animal materials, 22%
- Hydrogen or Fuel cell drive, 15%
- Others, 7%

China

- Materials made from highly recyclables, 57%
- Recycled materials, mixture of raw materials and post-consumer waste, 53%
- Renewable raw materials in the interior, 51%
- Electric drive, 51%
- Hybrid technology, 49%
- Easily replaceable parts, 51%
- Hydrogen or Fuel cell drive, 43%
- Non-animal materials, 25%

Japan

- Hybrid technology, 43%
- Easily replaceable parts, 41%
- Electric drive, 32%
- Materials made from highly recyclables, 32%
- Recycled materials, mixture of raw materials and post-consumer waste, 21%
- Hydrogen or Fuel cell drive, 32%
- Renewable raw materials in the interior, 16%
- Non-animal materials, 10%
- Others, 5%

B.5. In your opinion, what kind of aspects characterize a sustainable vehicle? | Multiple Choice | Base: n_{DE}=1005. n_{US}=1004. n_{CN}=1004. n_{JP}=1000.
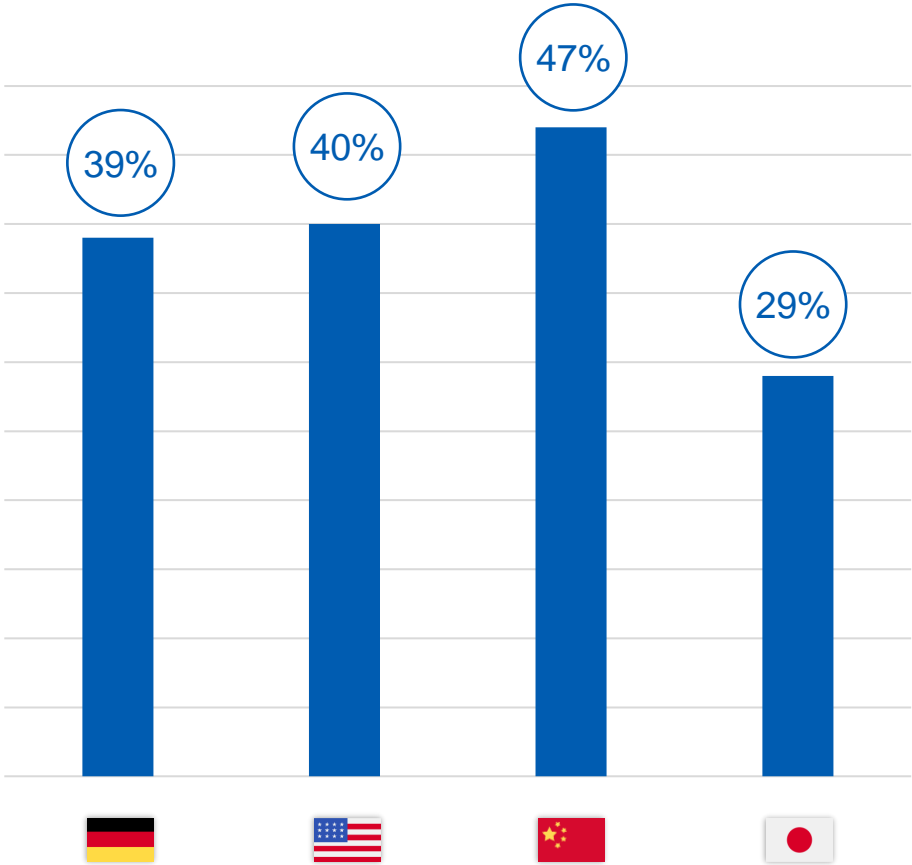
Interests in sustainable vehicles

68%
Will compare the **fuel efficiency** of different cars in the future

51%
Will pay more attention to **sustainability aspects** in their next car purchase

48%
Would spend **extra money** on a more sustainable vehicle

29%
Will **buy a new full electric vehicle** (BEV)

$500 Extra spending on a more sustainable interior

$3.000 Total spending for a more sustainable vehicle
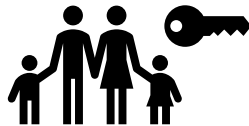
$- $1,000 $2,000 $3,000

Interest in new car features

Interests in Over-The-Air updates / functions

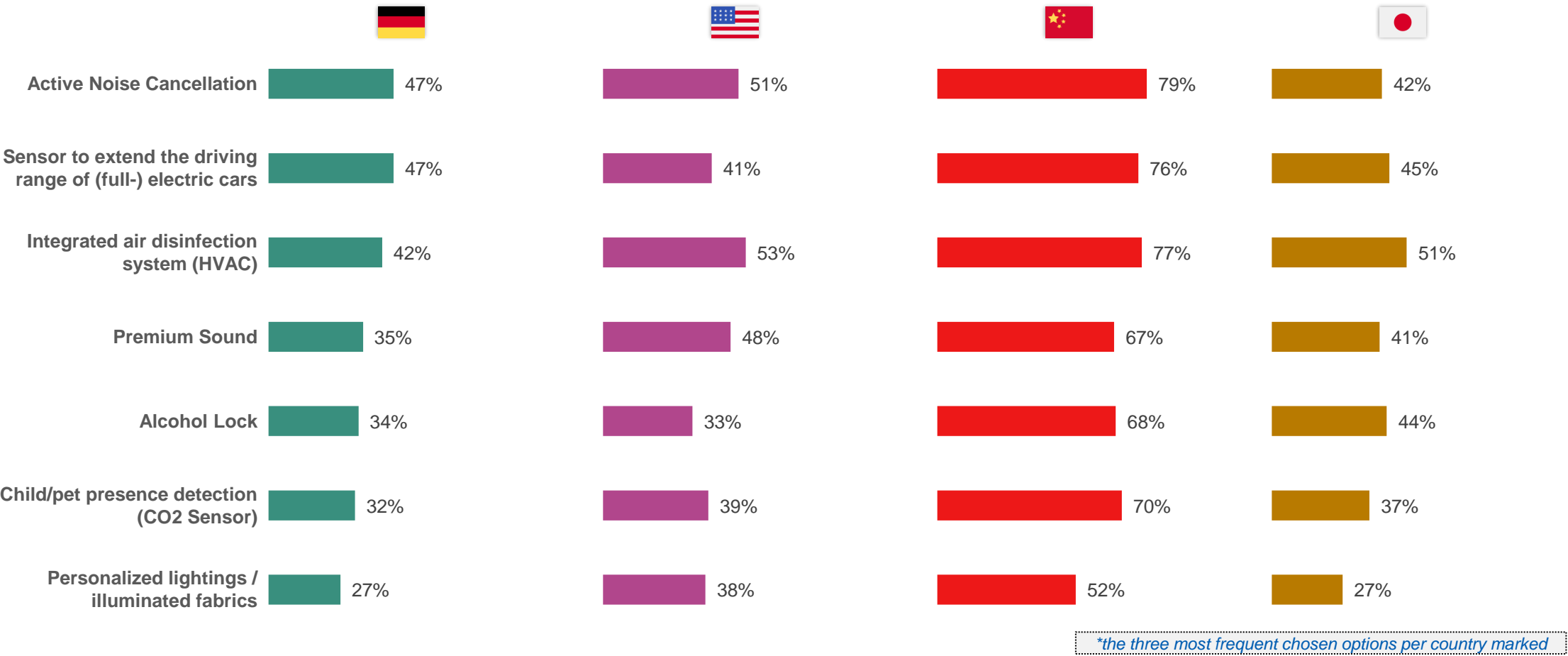**Activated for a certain period**
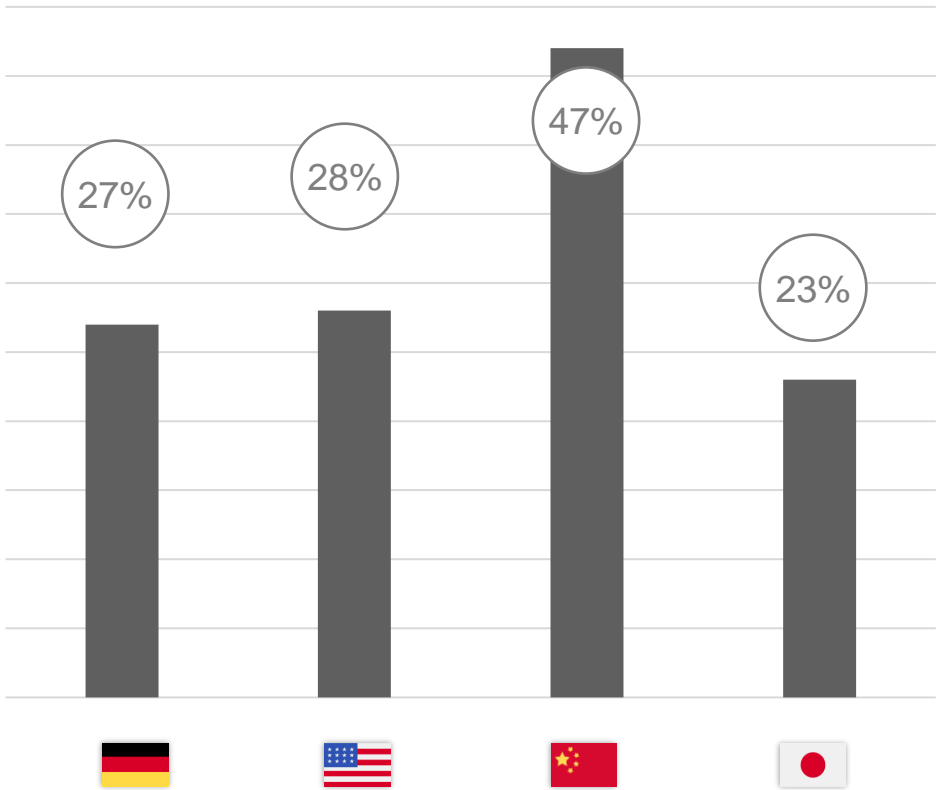
Activated for a certain user/ key

27% 🇩🇪
28% 🇺🇸
47% 🇨🇳
23% 🇯🇵

39% 🇩🇪
40% 🇺🇸
47% 🇨🇳
29% 🇯🇵

Asahi**KASEI**

Most interesting features to obtain via Over-The-Air updates

	🇩🇪	🇺🇸	🇨🇳	🇯🇵
Active Noise Cancellation	47%	51%	79%	42%
Sensor to extend the driving range of (full-) electric cars	47%	41%	76%	45%
Integrated air disinfection system (HVAC)	42%	53%	77%	51%
Premium Sound	35%	48%	67%	41%
Alcohol Lock	34%	33%	68%	44%
Child/pet presence detection (CO2 Sensor)	32%	39%	70%	37%
Personalized lightings / illuminated fabrics	27%	38%	52%	27%

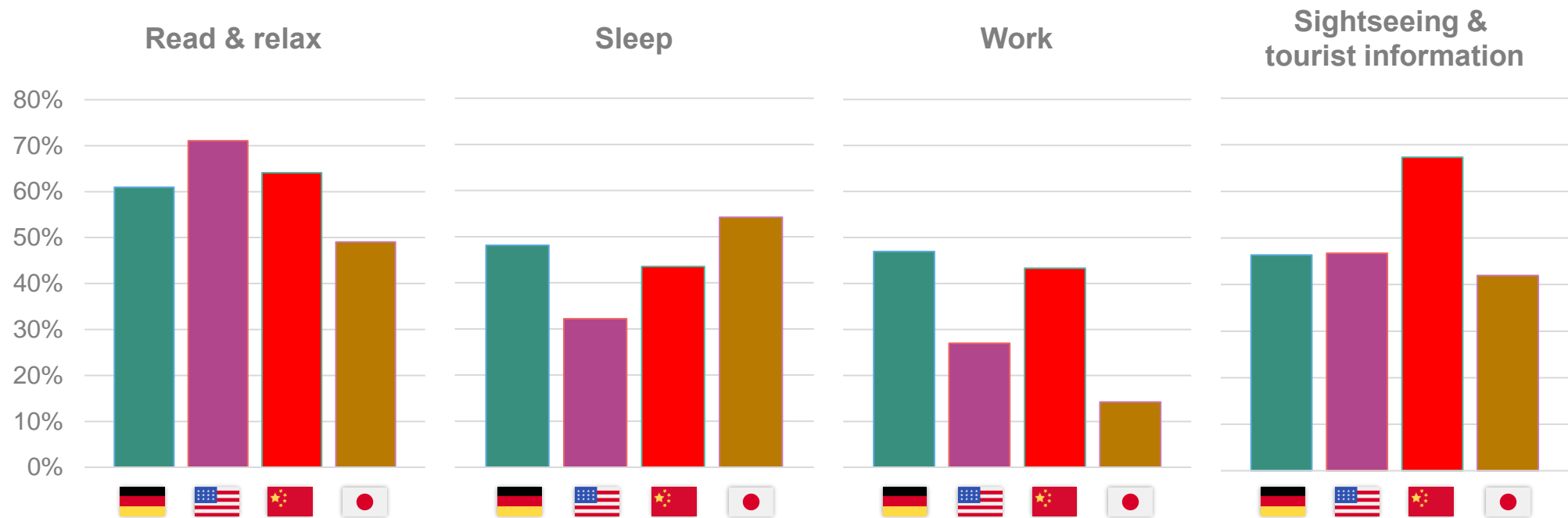*the three most frequent chosen options per country marked*

All: **E.2. Next, we would like to introduce you to different features that you can obtain via over-the-air updates**. Please indicate how interesting the different functions are for you personally. | Matrix | Scale from 1 "not interesting at all" to 5 "very interesting" | Base: n_{DE}=1005. n_{US}=1004. n_{CN}=1004. n_{JP}=1000.

2022 Survey Preview:
Usability & Autonomous Driving

Asahi**KASEI**

End users want to read and relax in autonomous cars

When traveling in a <u>shared</u> autonomous vehicle, I will…

Filter: F.3. = a (Shared autonomous vehicle): F.4. How would you spend the travel time when traveling in a shared autonomous vehicle? | Multiple Choice | Base: n_{DE}=164. n_{US}=152. n_{CN}=404. n_{JP}=155.

*the three most frequent chosen options per country marked

20

Asahi**KASEI**

Creating for Tomorrow

THE COMMITMENT OF THE ASAHI KASEI GROUP:

To do all that we can in every era to help the people of the world

make the most of life and attain fulfillment in living.

Since our founding, we have always been deeply committed

to contributing to the development of society,

boldly anticipating the emergence of new needs.

This is what we mean by "Creating for Tomorrow."