

*Asahi Kasei Automotive  
Interior Survey 2023*

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# About the Asahi Kasei Automotive Interior Survey 2023

This report summarizes key findings of the fifth edition of Asahi Kasei's annual trend survey regarding car users' purchasing decisions and preferences related to materials and features for the future of automotive interiors.

Conducted in December 2023 via online interviews, we asked a total of 4,158 car users across the four automotive core markets: Germany (1,074), USA (1,077), China (1,007), and Japan (1,000).

From its first edition in 2019, the survey has been conducted in cooperation with market research institute SKOPOS from Cologne, Germany.



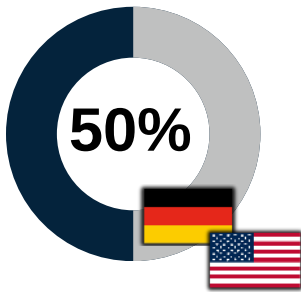
# *Brand Loyalty & Buying Motivation*

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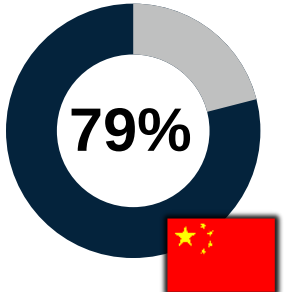
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# High share of customers in key markets willing to switch car brand



of car users in Germany and the USA are planning to purchase a new car (China: 89%, Japan: 60%)



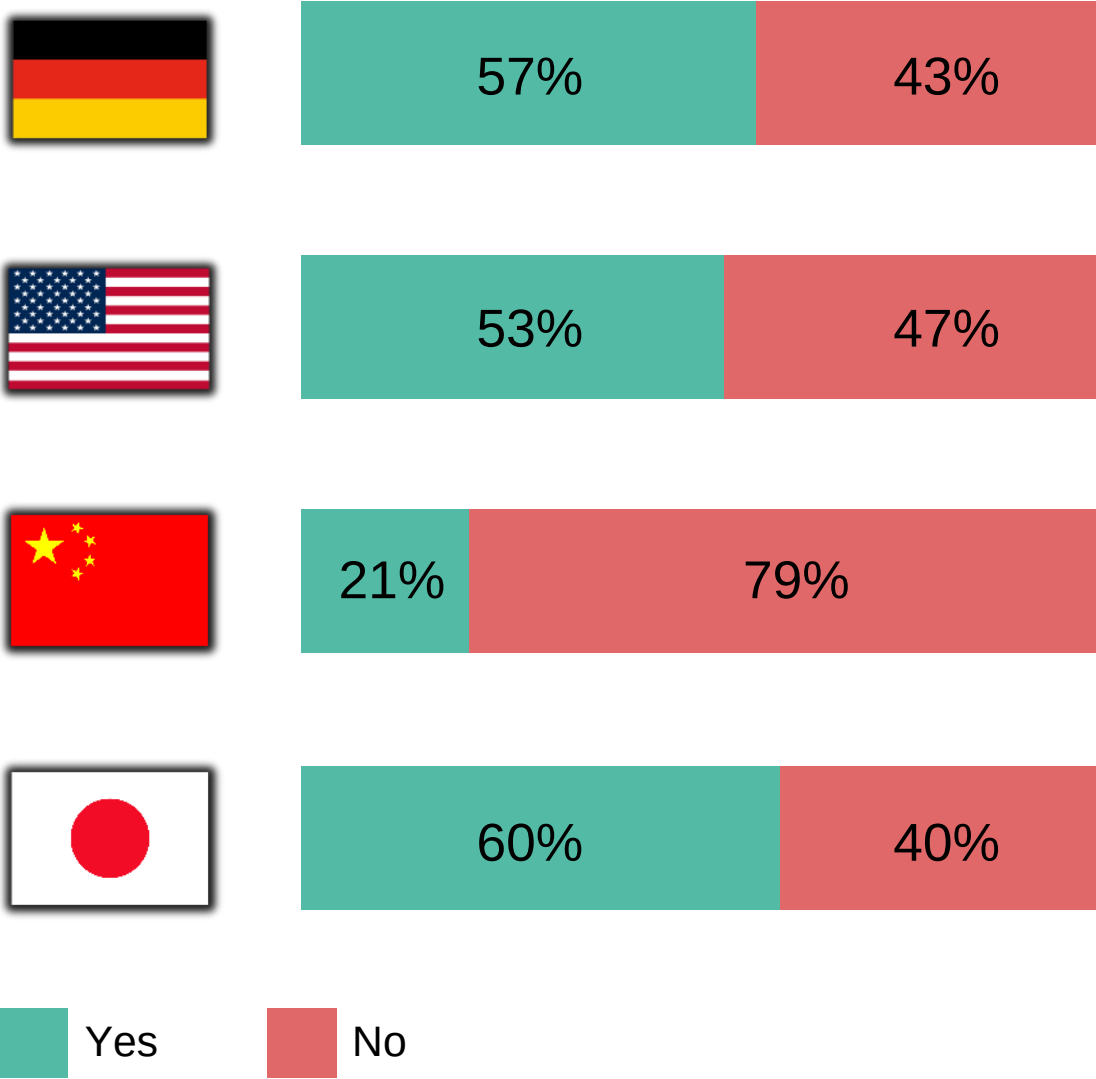
of car users in China are planning to change the brand of their vehicle (2020: 41%)



Generation Z (1995-2010) indicated the lowest degree of brand loyalty. Responses indicate that the younger the car users are, the less connected they are to a brand

With tightening competition, new manufacturers, and changing customer needs, brand loyalty is wavering worldwide - especially in the younger generations. Customers in China are remarkably open to switching car brands. Car manufacturers need to understand the end customers' needs and find ways to differentiate from their competitors.

## Choose same car brand?

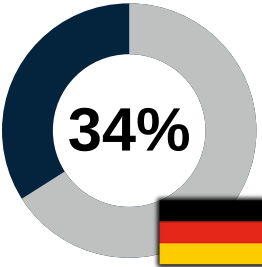


Base: nDE=892. nUS=856. nCN=948. nJP=760

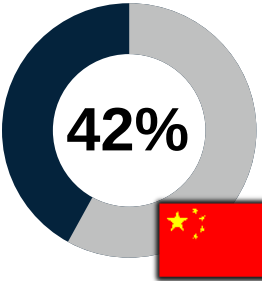
# Costs and quality are main motivation for changing brand



“Poor gas mileage/fuel consumption,” “not enough storage space,” and “too much noise while driving” were cited as the most annoying factors in current car by respondents



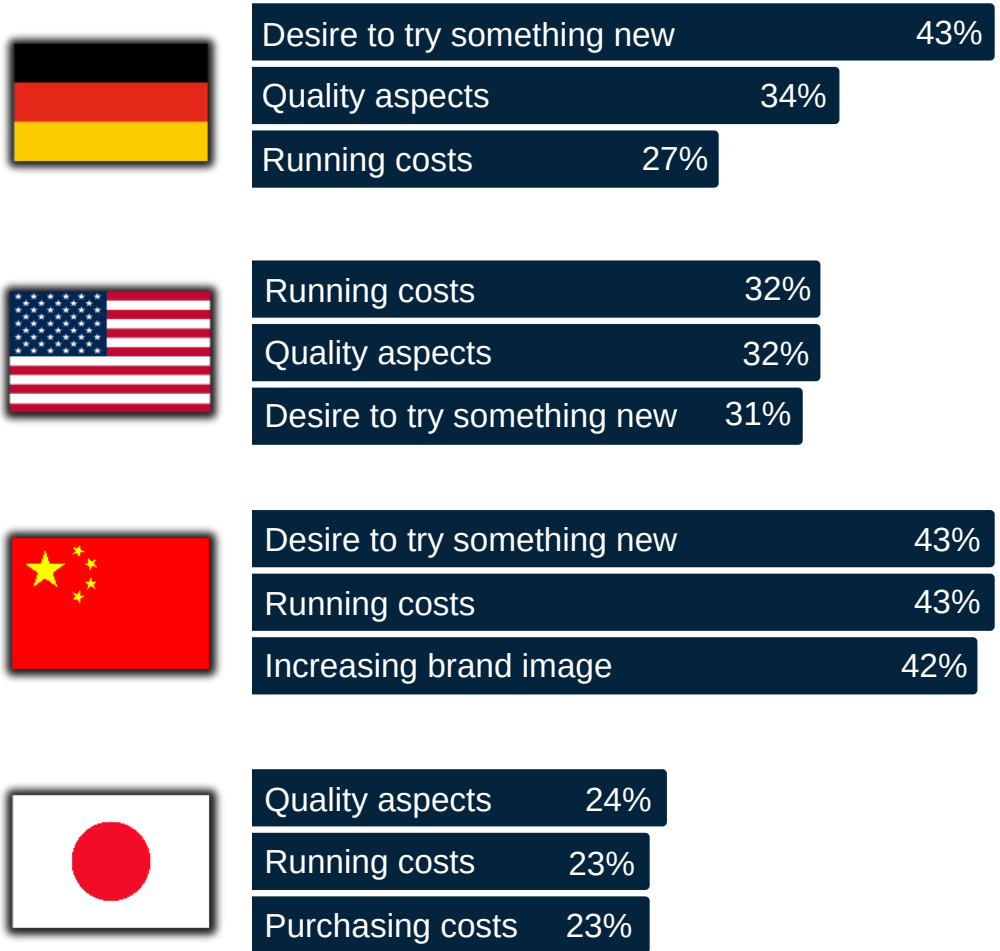
34% of car users in Germany list quality aspects as motivation for switching to a different car brand



42% of car users in China are influenced by an increasing brand image, especially of established premium car manufacturers

In China, the “desire to try something new” is the main motivator for switching to a different vehicle brand--primarily to premium brands. This coincides with the purchasing influence of “increasing brand image” by established premium car manufacturers, in contrast to volume manufacturers, who are currently losing market share in China.

## Main motivation for changing brand



Base: nDE=383. nUS=405. nCN=752. nJP=310  
Multiple choice

# Buying decision mainly influenced by costs



Car users worldwide expect purchasing and maintenance costs to rise. For this reason, the importance of “fuel/power consumption” and “running costs” rise accordingly when users buy their next car



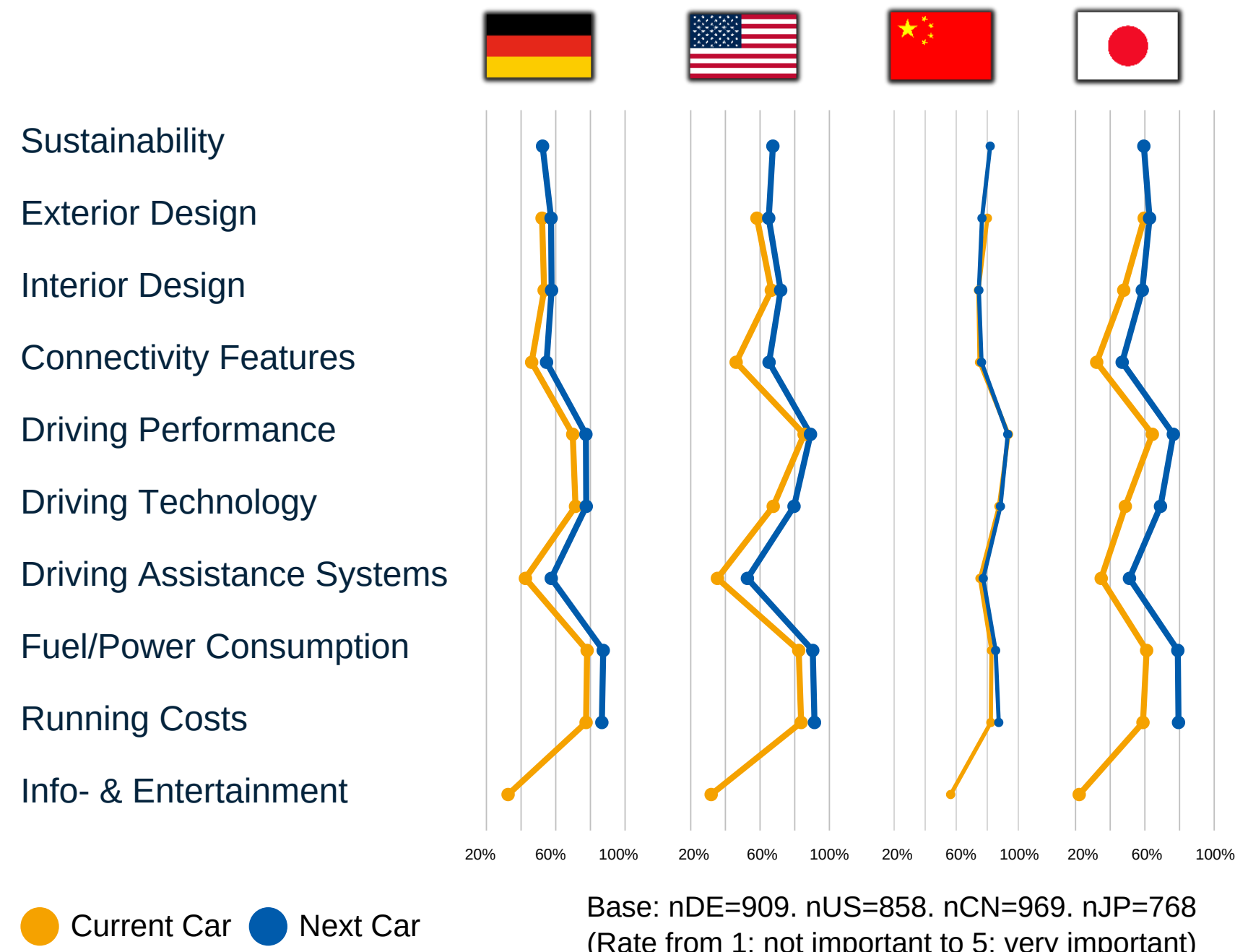
Exterior and interior design of automobiles are equally important in all surveyed regions



“Sustainability” in the decision process for users’ next car is less relevant than other factors

Since the first survey in 2020, fuel/power efficiency and running costs have been the most influential factors in the buying process. The results for all features that influence purchasing choice have been consistent across each survey.

## How important were/are the following features when purchasing the current/next car?



# *Electromobility*

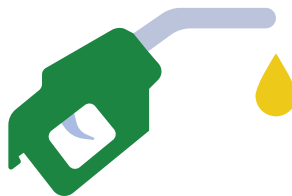
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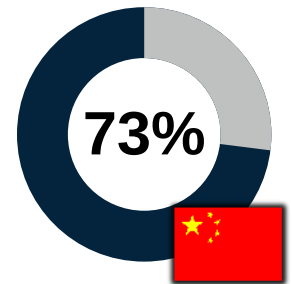
# No clear shift to pure electric vehicles



Respondents are mainly driving cars with internal combustion engines, and there is a high inclination to stick to petrol engine in their next car



Willingness to buy an electric vehicle in all regions is still moderate, with no significant changes compared to 2020



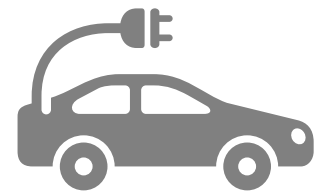
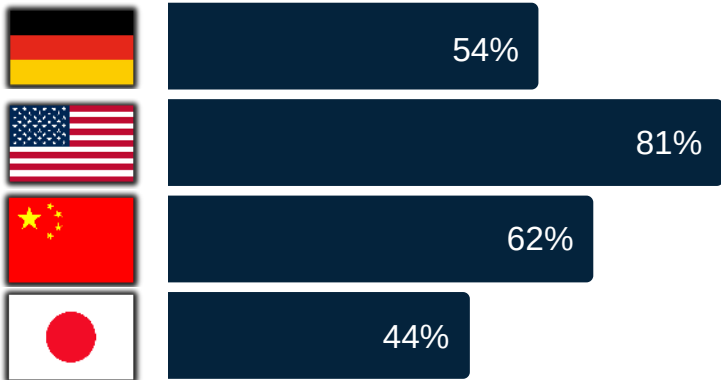
73% of car users in China are willing to buy a car with hybrid drive

Stimulated by governmental subsidies, technological improvements and a growing network of charging stations, pure electric vehicles are slowly gaining in popularity within Western markets. However, no clear shift can be observed in the last survey--further advancements need to be achieved in order to convince the majority of car users.

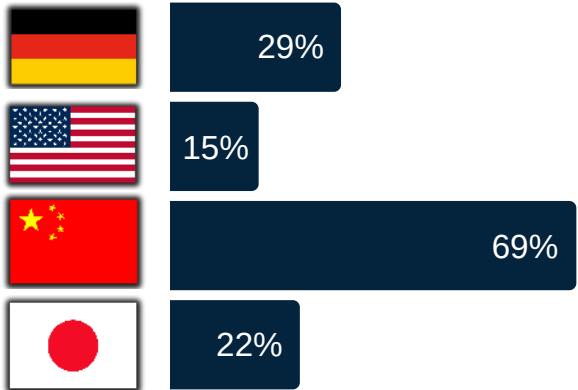
## How likely is it that your next car has a ...?



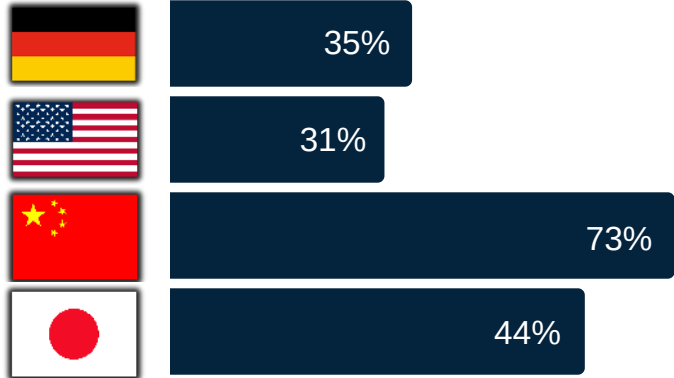
Petrol Engine



Pure Electric Drive



Hybrid Drive

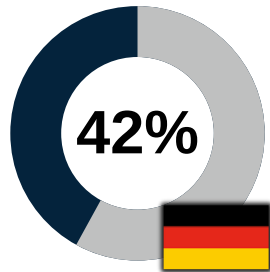


Base: nDE=909. nUS=857-858. nCN=969.  
Scale from 1 "Very unlikely" to 5 "Very Likely"

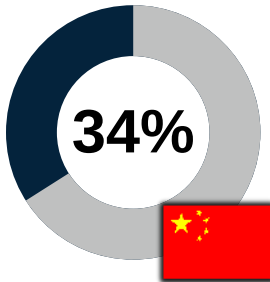
# Driving range and battery lifetime as gatekeepers



More than every fifth EV owner in all regions annoyed by too much noise while driving in current car



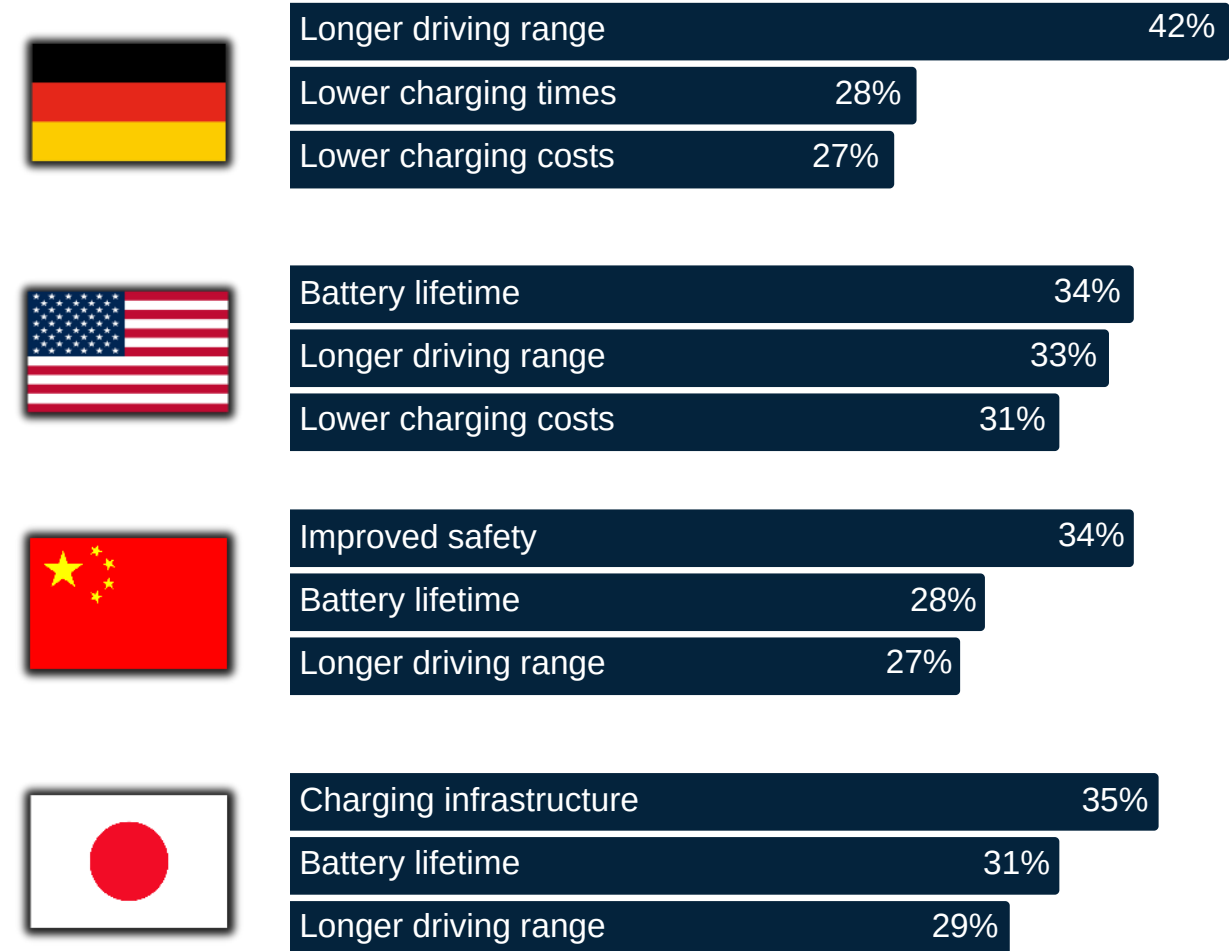
42% of non-EV owners in Germany could be convinced by an extended driving range



34% of non-EV owners in China see improved safety as influencing factor to buy an EV

While an increasing number of non-EV owners show an interest in purchasing an electric car, there are still challenges that prevent a faster shift in the market. In addition to cost aspects, further technological advancements in the fields of battery performance, lifetime, and safety will be needed to improve the acceptance of electric vehicles in all major regions.

## Influencing factors for non-EV owners to buy an EV



Base: nDE=860. nUS=848. nCN=899. nJP=761. (Multiple choice, choose max. three answers)

# *Autonomous Driving*

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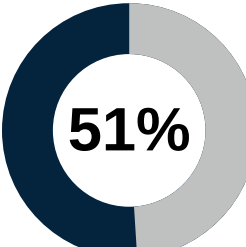
# Customers value comfortable seats and a quiet atmosphere



Connectivity comes secondary to comfortable seating and a silent cabin; integrated streaming services, entertainment, or surfaces for working and eating are less relevant



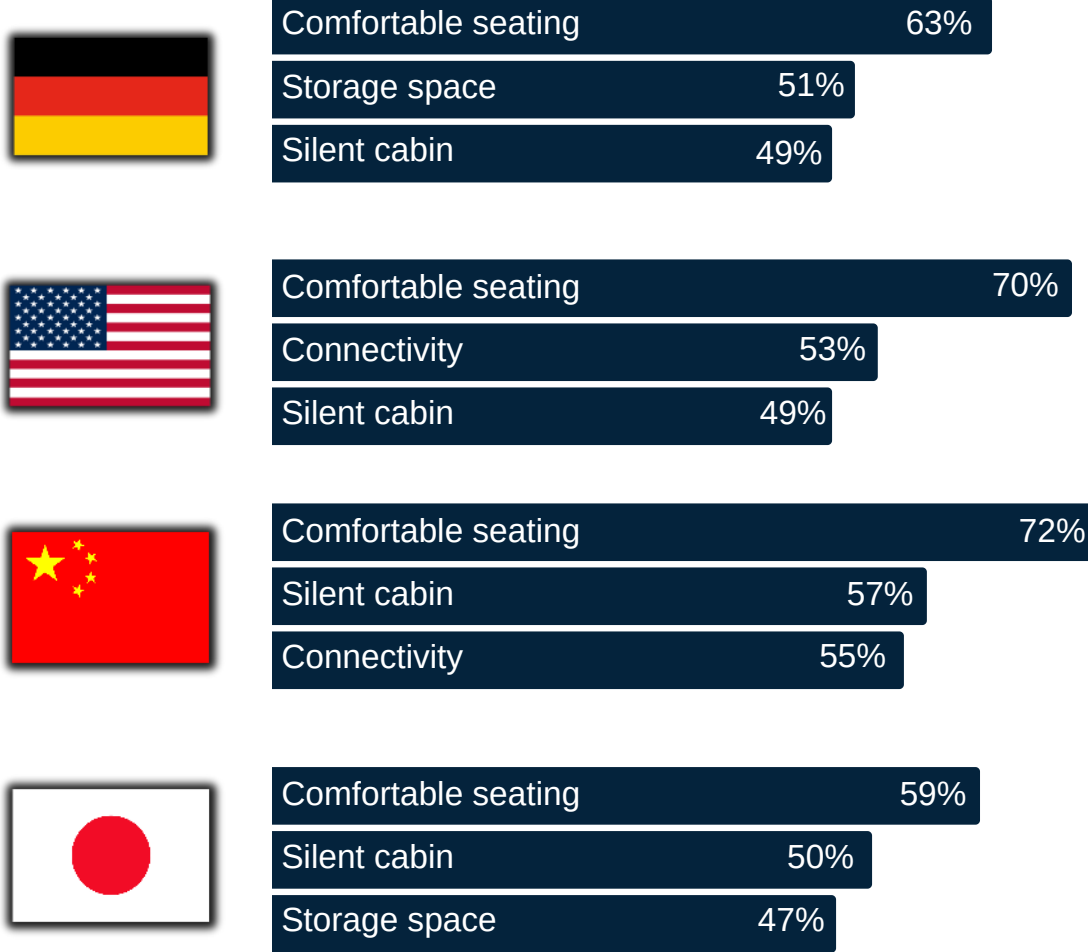
Storage space is important, but a retractable steering wheel and pedals are not considered as valuable by majority of respondents



51% of respondents in all regions prefer voice control for answering calls. Touch screen is the preferred control for media and HVAC, while push/rotary button for windows and seat adjustments are favored

Fully autonomous cars will become mobile living rooms, allowing car manufacturers to rethink and redesign the entire car interior while ensuring optimized storage area. In regard to autonomous vehicles, customers value comfort, connectivity, and silence.

## Most valued interior aspects in an autonomous vehicle (2-hours ride)



Base: nDE=1074. nUS=1077. nCN=1007. nJP=1000. Multiple Choice, limited up to 5

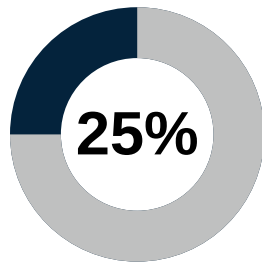
# Space for communication and listening to music



Talking with other passengers is a preferred activity in all four regions



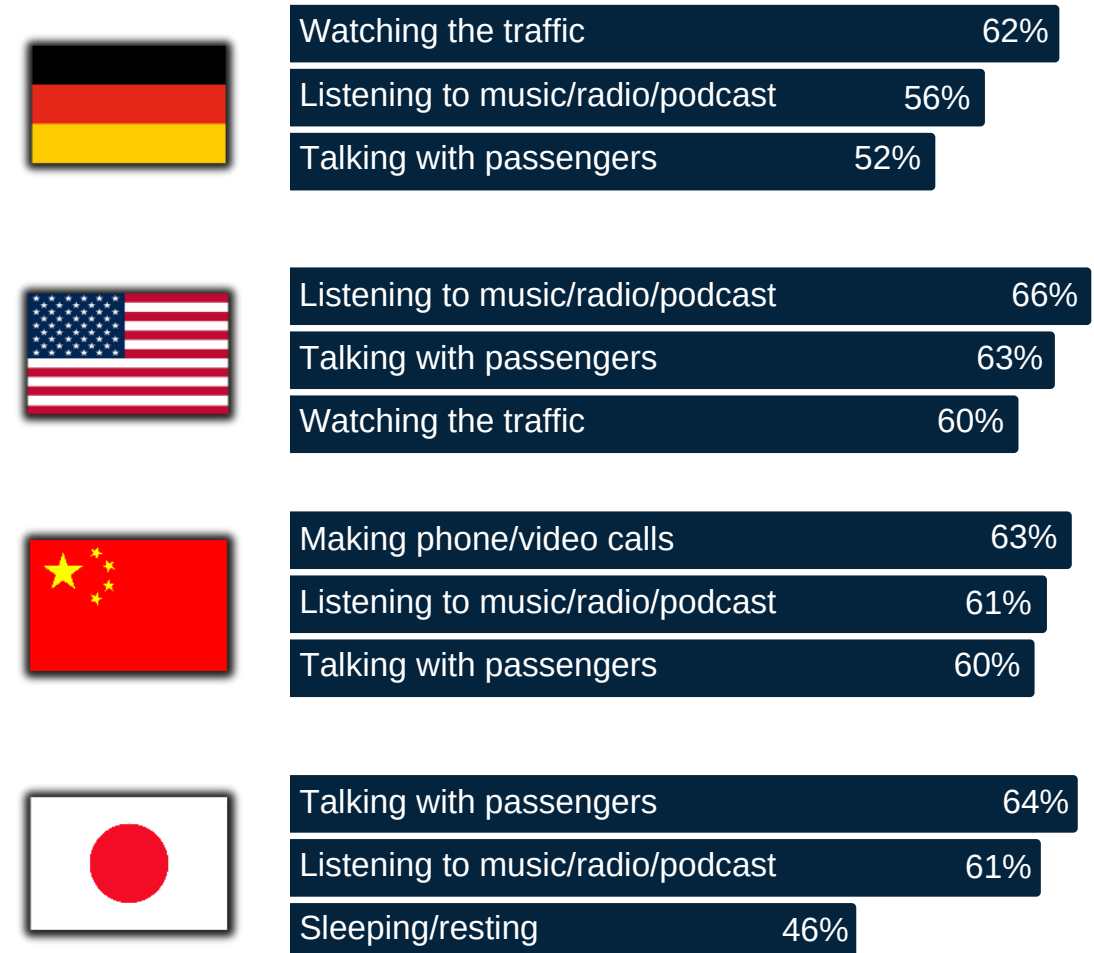
Listening to music/radio/podcast is preferred to watching movies, gaming, or working in the car



of all respondents in the USA would sleep/rest in the car. In Germany every third, and in China and Japan every second respondent, would undertake this activity

Despite riding in a fully autonomous car, two out of three car users in Germany, USA and China stated they would observe the traffic. In addition, watching movies or playing games is at the bottom of the list--another indication that car users today have safety concerns and want to keep their eyes on the traffic.

## Preferred activities in an autonomous vehicle



Base: nDE=1074. nUS=1077. nCN=1007. nJP=1000.  
Multiple Choice, limited up to 5.

# *Sustainability*

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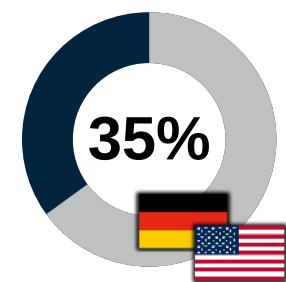
# Perception of sustainability differs among regions



Respondents in the Western markets define a sustainable car by the usage of recyclables and a sustainable production along the value chain



For car users in China and Japan the drivetrain technology defines a sustainable car



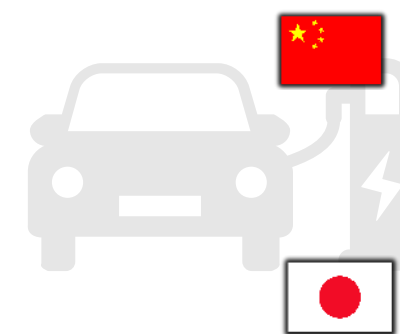
35% of all respondents in Germany and the USA would switch their car brand to a more sustainable manufacturer in order to support greener mobility

Car users define a “sustainable vehicle” no longer only by the drivetrain technology, but also by the carbon footprint in production, easily recyclable materials, and even the sustainable production along the entire value chain. Buyers’ level of understanding for sustainability is growing, and the relevance of this topic in the purchasing process increased in recent years.

## How do you characterize a sustainable car?



- 1. Materials made from highly recyclables
- 2. Sustainable production along value chain
- 3. Recyclability of car and its components



- 1. Easily replaceable parts
- 2. Sustainable production along value chain
- 3. Materials made from highly recyclables

- 1. Electric drive
- 2. Hybrid technology
- 3. Sustainable production along value chain

- 1. Hybrid technology
- 2. Easily replaceable parts
- 3. Recyclability of car and its components

Base: nDE=1074. nUS=1077. nCN=1007. nJP=1000  
(Rank answers according to your priority)

# About Asahi Kasei

Asahi Kasei is a Japanese one-stop solution provider of advanced materials and technologies for the automotive industry. Ranging from high-performance plastics and innovative fiber materials, to synthetic rubber for eco-tires or market-leading lithium-ion battery separators – by leveraging its cross-divisional expertise, Asahi Kasei contributes to bringing automotive safety, comfort, and environmental performance to the next level.

Do you want to get more insights?  
Reach out to us!



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