



Autonomous and Connected: The Future Global Automotive Landscape

September 2024

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EXECUTIVE SUMMARY

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Key findings

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Autonomous and connected: three key facts in the digitising automotive industry

Deciphering the drivers of the autonomous and connected car industry

SIZING THE AUTONOMOUS CAR MARKET

Shift to partial autonomy is occurring with SAE Level 2 dominating but Level 0 cars still lead

Major automotive markets show differing appetites for semi-autonomous cars

Among major brands, Toyota is leading the charge with ADAS-equipped vehicle sales

Mercedes is the first Western OEM to reach SAE L3

Case study: BYD cleared to test Level 3 cars in China with its DiLink driving system

By 2040, 96% of light vehicles sold will have some form of autonomy

Shift to fully autonomous remains challenging, but Chinese OEMs are ramping up efforts

Case study: Mercedes gets approval to test Level 4 vehicles in China

CONSUMER ATTITUDES TO CONNECTED AND AUTONOMOUS CARS

What are consumers' expectations of connected and autonomous vehicles

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Consumers remain concerned about fully autonomous cars but improvements in AI may help

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Ride hailing: Robo-taxi services will boost profits amid lower operating costs

Case study: Didi to roll out self-driving vehicles in partnership with GAC

Logistics/deliveries: AVs will transform logistics and last-mile delivery with lower costs

Case study: serve robotics partners with Shake Shack for autonomous deliveries

Automotive: software-defined shift to help drive new business models and revenue streams

Case study: KIA launches subscription service for OTA updates

Insurance: driver habit-based insurance policies will redefine insurance premiums

Case study: Citroën introduces usage-based insurance for eC3 owners in India

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Case study: MediaTek partners with Nvidia to deliver next-gen connected car technology

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CONCLUSION

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