

Pressemitteilung

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AutomotiveINNOVATIONS Report: The Most Innovative Premium Car Brands 2019

Bergisch Gladbach, 07.08.2019.

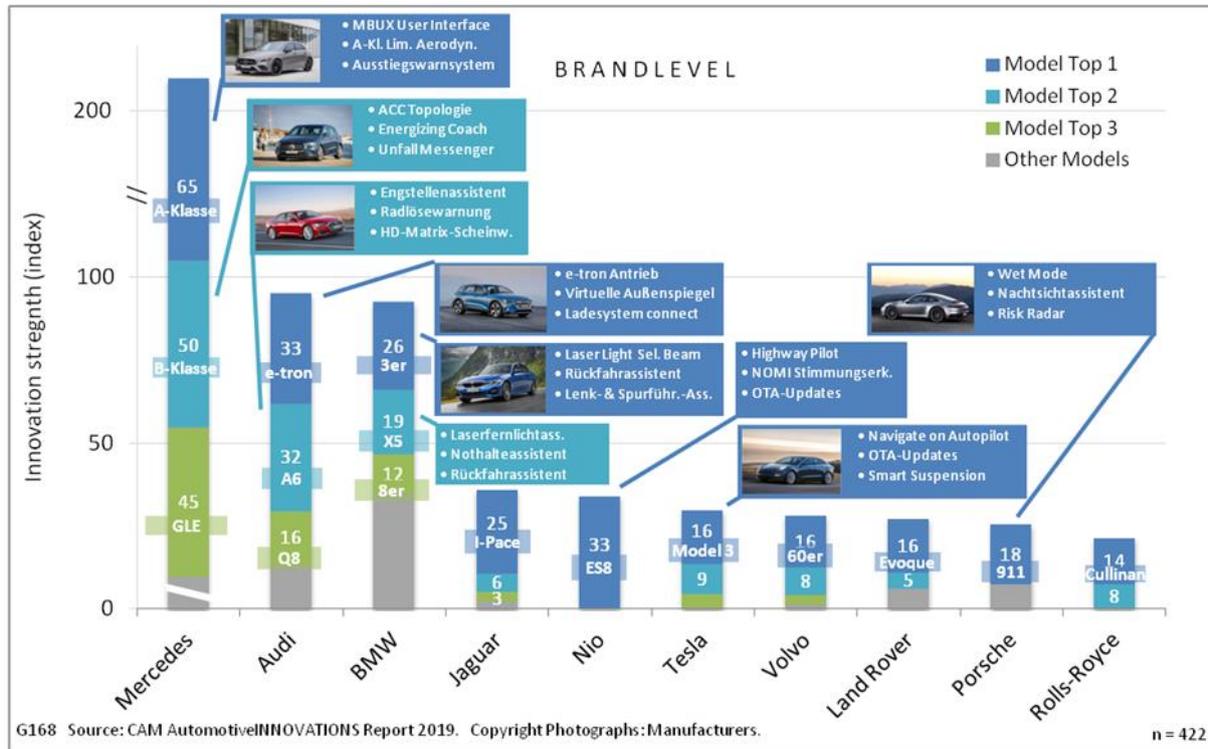
- Mercedes-Benz is the most innovative premium car manufacturer in 2019 ahead of Audi and BMW.
- For the first time ever, a Chinese manufacturer is among the top 5 most innovative premium manufacturers.
- There is a need to catch up with German manufacturers in the key innovation field of electromobility (BEV).

Mercedes, Audi and BMW will remain the most innovative premium automotive manufacturers in 2019. The German brands still clearly point the competition in the overall view of all technology fields. However, this does not apply to the key innovation field of electromobility (BEV). In the case of purely electric drives, the German premium manufacturers are "followers" in a worldwide comparison. The premium competition, which, in addition to Tesla, is increasingly coming from new players from China, focuses its innovation activities primarily on battery electric mobility (BEV) and connectivity innovations.

These are the most important findings of the CAM "AutomotiveINNOVATIONS Report 2019, which evaluated the innovative strength of 32 premium automotive brands on the basis of 637 innovations last year. In this context, all innovations that bring a customer's added value in comparison to the status quo are regarded as "innovations". Each innovation is systematically weighted individually according to the MOBIL approach *.

The German premium brands continue to have an extraordinarily high innovative power. In particular, they succeed in placing a multitude of innovations in a wide variety of segment classes through clever modular strategies. With 112 innovations and a clear gap, Mercedes-Benz will be the most innovative premium brand in 2019. It is noteworthy that this placement is essentially due to three new model series: the many innovations of the A-Class, B-Class and GLE sum up to 70 percent of the innovative strength of Mercedes (see Figure 1). An example of this is the new user interface MBUX with advanced voice control and augmented reality navigation in the A and B classes. Furthermore, the learning operating concept "Prediction Features", a new navigation address system "what3words", the exit warning systems in A- and B-Class or the "Energizing Coach" in the GLE. Mercedes has managed in the current period of observation to present many innovations relatively quickly in several new model series, which are currently being presented. are world-new in the respective segment.

Figure 1: Top 10 of the "Most Innovative Premium Brands" 2019

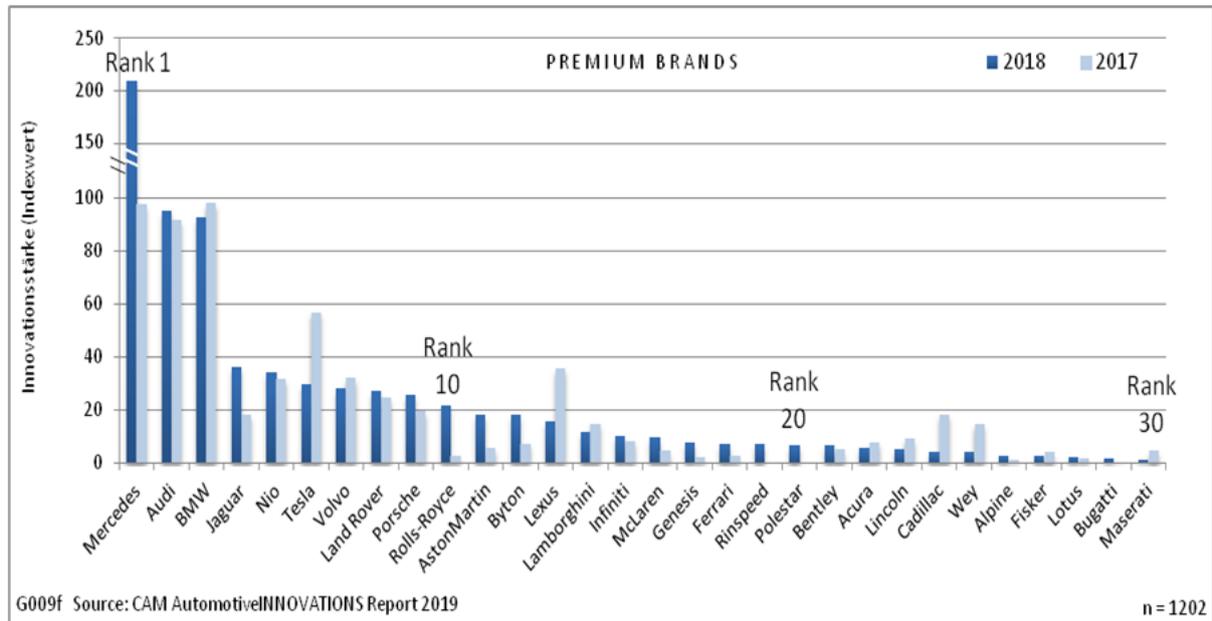


There are also three model series for the second-place Audi, which even make up 86 percent of the brand's innovative strength of a total of 69 innovations. In addition to the Audi Q8, these are primarily the newly launched A6 series and the all-new all-electric Audi e-tron. It can boast 18 innovations, including eight world novelties such as the virtual exterior mirrors, which thanks to the camera system have almost no blind spots, or the electric drive system, whose battery can be "refueled" as the first production vehicle with up to 150 kW.

BMW, the third-ranked premium brand just behind Audi, generates 75 innovations in 2018. In doing so, BMW distributes its innovative strength to significantly more construction series. The top 3 - 3-series, X5 and 8 Series - account for only 62% of the innovative strength, also because the new 3 Series came on the market in 2019 and therefore had to be evaluated in the previous year as a pre-series and thus weaker. The series evaluation will take place in the current year. A high score is to be expected here, because the new BMW 3 Series is improving in terms of weight, aerodynamics, driver assistance systems and connectivity, e.g. through "functions-on-demand".

Conspicuous are also the premium manufacturers from China, where an OEM comes for the first time in the top 5: The Chinese brand Nio can improve in the current period from 7th to 5th this year and is together with Byton (12th) currently the spearhead of the new Chinese premium brands. These focus noticeably on e-mobility and connectivity. Nio generates about 25 innovations in the ES8, including a battery change concept or a mood recognition. Byton comes to 24 innovations, which are still pre-series or study innovations. All in all, the Chinese OEMs can become relevant competitors for the German top dogs in the premium sector as well.

Figure 2: Most innovative premium brands - Top 30



In addition to Mercedes-Benz, Jaguar and Rolls-Royce have improved a lot in the top 10 compared to the previous year (see Figure 2). Jaguar as a subsidiary of the Tata Group benefits above all from the electric SUV I-Pace, the BMW subsidiary Rolls-Royce from the new SUV Cullinan. Tesla, Volvo and Jaguar Land Rover are in sixth, seventh and eighth rank respectively, just ahead of Porsche (9) and Rolls-Royce (10) in the top ten of the 2019 innovation-strongest premium brands.

Noticeable losses in innovation index points this year are mainly due to Tesla and Lexus. Fourth last year, the Californian automaker Tesla slipped to sixth place. This is because Tesla did not have any new product introductions or any groundbreaking innovations in addition to software updates during the period under review. Lexus is only in 14th place after fifth place last year. Cadillac, too, has hardly made any changes this year and is now ranked only 24th (6th in the year) behind Lincoln.

Study Director Stefan Bratzel states: "The occasional swan song on the German premium manufacturers is premature. Mercedes, Audi and BMW are enormously innovative and dominate the innovation ranking this year. However, German premium providers must rigorously demonstrate their strengths in the key areas of e-mobility and connectivity. The German premium providers are still lacking groundbreaking e-vehicles or important connectivity functions such as the over-the-air updates of the vehicle's operating system. It's clear that competitors like Tesla and Nio are getting stronger. "

Methodology:

The AutomotiveINNOVATIONS Report 2019 analyzes the current and future innovation trends of the automotive industry as well as the innovative strength of automobile manufacturers. Since 2005, more than 40 defined criteria such as technology field, innovation type, originality, degree of maturity, etc., have been collected per year by more than 40 car manu-

facturer groups per quarter and evaluated individually according to the MOBIL* approach. For example, world novelties that are available in series are rated higher than me-too innovations, which are only available as a prototype. This results in an index value for each innovation, which can be aggregated into totals for individual groups, brands or models. A methodology overview including the MOBIL * approach can be found here: <https://www.auto-institut.de/download/MOBIL-Approach.pdf>

To the study:

The complete study AutomotiveINNOVATIONS Report 2019, which contains approx. 150 PowerPoint pages with approx. 120 graphics, illustrations and tables, can be ordered at www.auto-institut.de. On the basis of more than 1,300 categorized and individually assessed vehicle-technical innovations of the year 2018/19, it identifies the future trends of 42 automobile groups with 96 brands, among others. from Europe, Japan, the USA and China.

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