

Insider Q&A: IHS Automotive analyst Jeremy Carlson

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This photo provided by IHS Automotive shows Jeremy Carlson, a principal analyst for IHS Automotive. Autonomous cars will appear on worldwide roads in big numbers between 2025 and 2035, according to a new report by IHS Automotive. Carlson said the consulting firm raised its forecast after watching the substantial amount being invested in autonomous technology by automakers, suppliers and others. (Michelle Culver/IHS Automotive via AP)

Autonomous cars will appear on worldwide roads in big numbers between 2025 and 2035, according to a recent report by IHS Automotive.

The report forecasts global sales of [autonomous vehicles](#) will rise from 600,000 in 2025 to 21 million in 2035. China will have the most, with 5.7 million; the U.S. and Europe will be right behind.

IHS analyst Jeremy Carlson says the consulting firm's forecast reflects the substantial amount of money being invested in autonomous technology. General Motors Co. recently bought a self-driving software startup in San Francisco, for example, while Uber and Google are testing self-driving cars on public roads.

Here, Carlson answers some questions about [autonomous cars](#) from The Associated Press. His comments have been edited for length.

Q. Will traditional automakers be making autonomous vehicles in 2035? Or technology companies?

A. Within the 21 million autonomous vehicles sold worldwide in 2035, we expect a healthy mix of 'traditional vehicles' with an [autonomous mode](#) and new and purpose-built designs that forego driver controls and therefore represent a very different use case—what is often called on-demand mobility-as-a-service. The former will likely remain the stronghold of automakers; the latter will be a mix of manufacturers, owners and operators of the mobility-as-a-service business model.

Q. A recent study from the University of Michigan suggested that almost half of drivers don't want any autonomous capability in their next car. How will the public come around to this idea?

A. Consumer acceptance is one of the stronger headwinds, but drivers

today are already getting experience with similar functionality. Electronic stability control already includes semi-autonomous functionality. Automatic braking—probably the most clear and acute form of autonomy in cars today—will be standard equipment in the U.S. by 2022 and is common in luxury vehicles already. Other systems like [adaptive cruise control](#) and automatic parking tend to garner positive feedback. As these technologies that enable greater safety and convenience become more common across the industry, even more drivers will grow to understand the value they provide.

Q. You see the earliest deployment in the U.S. But most states still haven't passed legislation regulating autonomous cars. Is technology coming too fast for government to keep up?

A. Regulation is the other major headwind next to [consumer acceptance](#), but IHS expects regulators to recognize the benefits that autonomous mobility can bring their citizens and find the means to work through these complex issues. That said, regulators certainly face big challenges today—they are being asked to regulate very technical topics without being provided any technical education themselves, and they must do so with an eye toward future-proofing rapidly evolving technology and consumer markets. Federal regulation will be necessary for long-term mass deployment, but it will be states that pioneer autonomous vehicle regulation in the U.S in the short term.

Q. Are consumers in some markets more accepting of autonomy than others?

China's growing middle class, urban population density, environmental challenges and centralized authority will all play a part, and these factors also tend to be favorable to the mobility-as-a-service model. In the U.S. and Europe, vehicle ownership is more established and will remain strong, but there are still areas where mobility-as-a-service can be

attractive. The future of autonomous mobility will be unique in each market.

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