KONZEPT
HAUS
DESIGN STUDY

KDSxAI

AUTOMOTIVE DESIGN REPORT 2026

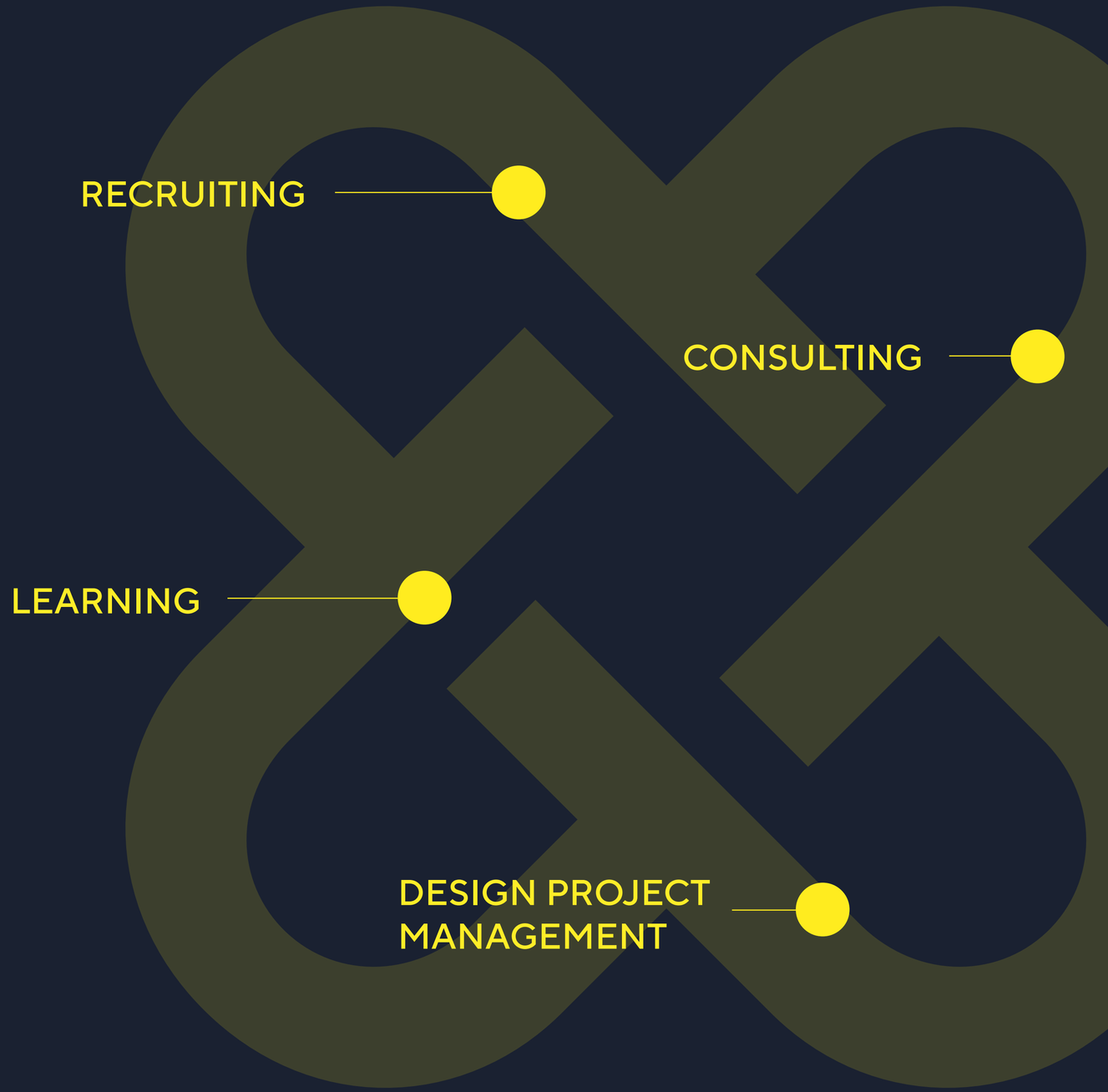
ARTIFICIAL INTELLIGENCE (AI) IN AUTOMOTIVE DESIGN

KONZEPT HAUS

We build creative teams.

Konzepthaus provides specialised services for the automotive design industry, empowering companies to innovate, grow, and build future-proof foundations for success in an evolving market. Through our four pillars – Recruitment, Consulting, Learning, and Design Project Management – we offer the full range of solutions tailored to empower creative teams.

Our Consulting services lay the groundwork for strategic, future-ready growth; our Learning programmes equip teams with new skills to stay ahead and help managers excel in leadership; our Recruitment solutions bring in top talent to enhance capabilities; and our Design Project Management expertise ensures seamless project delivery, allowing teams to focus on innovation. Together, we help automotive design leaders shape a forward-thinking industry where creativity and excellence thrive.



AI is everywhere individually, but nowhere institutionally

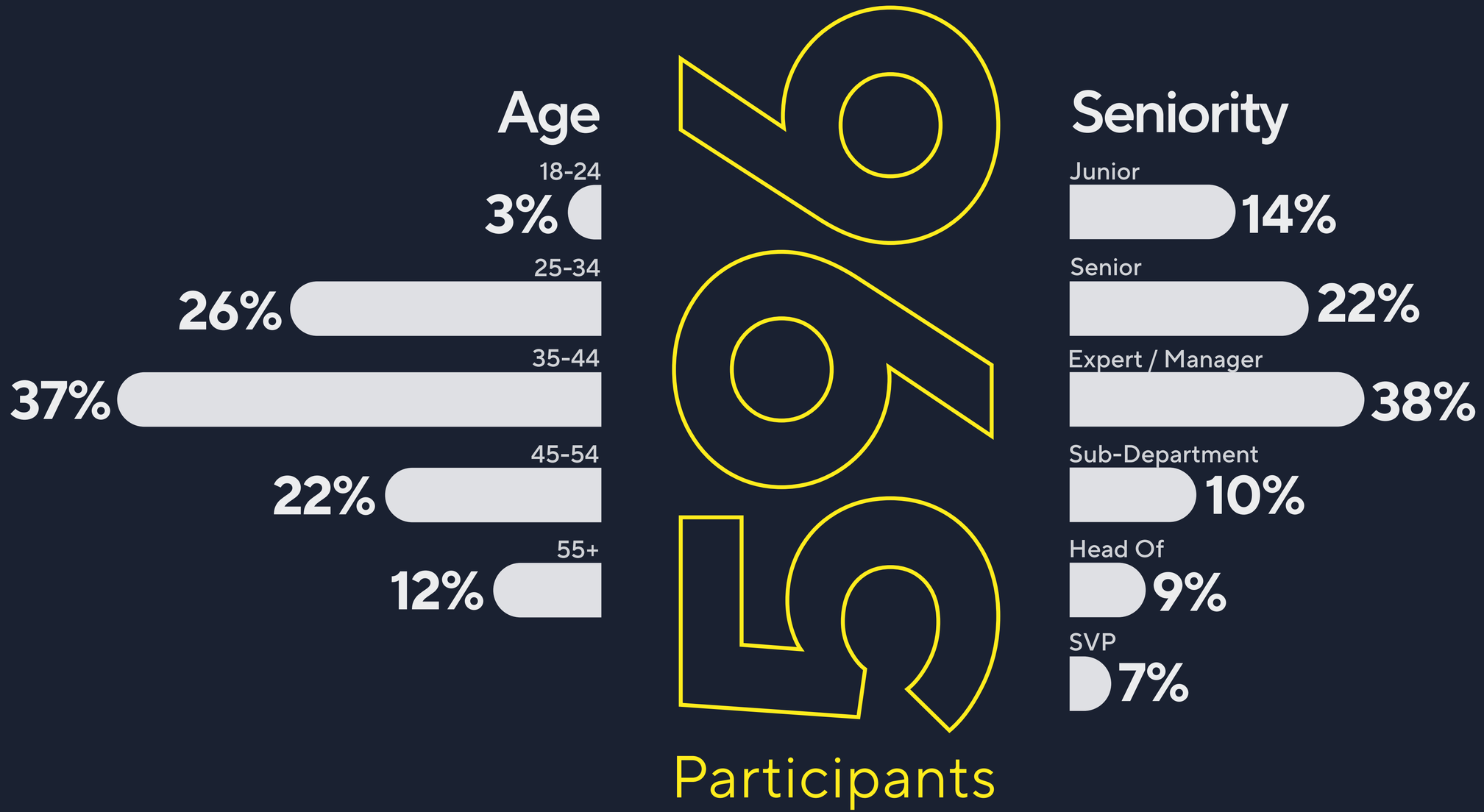
Our key takeaways:

- AI efforts remain fragmented and individual, not institutionalised.
- Usage is mostly concentrated in areas that are far away from core product realisation.
- As a result, AI's real, product-level potential remains largely untapped.

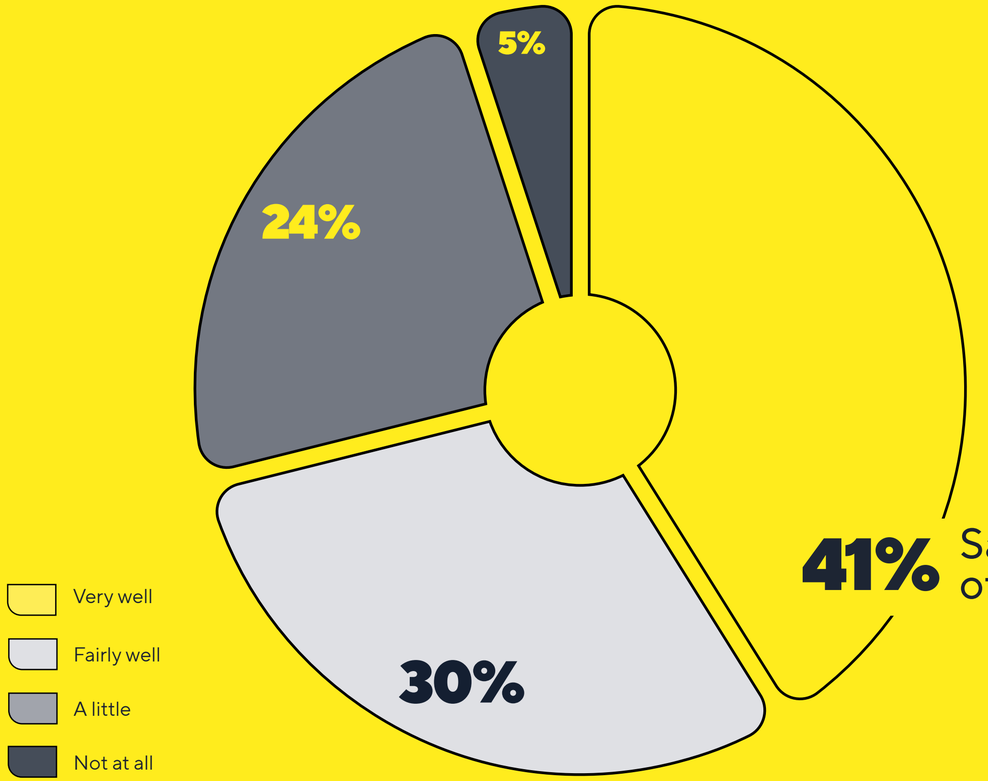
The current AI narrative in Automotive Design promises more than organisations can absorb. Despite widespread experimentation, AI has yet to become a trusted part of daily design work or a driver of better decisions. Instead of freeing up creative capacity, it often adds complexity, risk and fragmentation. As long as AI is discussed more loudly than it is structurally integrated, its role will remain marginal.

Thank you to everyone who contributed. We hope this study encourages reflection and constructive discussion.

Martin Groschwald
CEO


Age
18-24
3%
25-34
26%
35-44
37%
45-54
22%
55+
12%
Seniority
Junior
14%
Senior
22%
Expert / Manager
38%
Sub-Department
10%
Head Of
9%
SVP
7%
Participants

AI is everywhere individually...



Today, the AI usage is widespread. Around 90% use AI at least occasionally. In 2023, around half of respondents reported never using AI.

Encouragingly, tool understanding has also improved.

41% Say they understand the capabilities of AI tools **„Very well“**

...but nowhere institutionally.

9% have a defined AI roadmap
50% say AI efforts are driven by individuals
56% don't know about their IP rules
75% report there is no AI structure

Taken together, these findings reveal a critical gap between AI usage and organisational maturity. While tools are widely used, ownership, structure, strategic direction and legal clarity remain largely undefined. This creates fragmentation, increases risk and prevents AI from becoming a reliable design capability rather than an experimental add-on.

Technology alone is never sufficient to deliver impact.
Value comes from embedding it into processes, governance and ways of working.

- McKinsey, The State of AI in 2023

From individual discovery to decentralised delivery

Individuals discover value…

Individuals close to the work are best positioned to surface relevant problems and evaluate tools. In many cases, the real solutions already exist somewhere within the organisation.

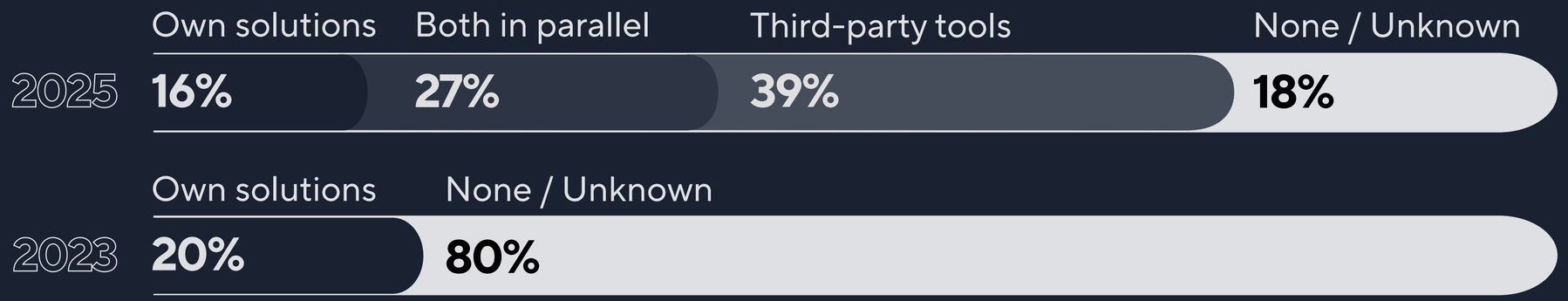
…but need authority and leverage to implement

Setting up decentralised teams can turn individual insight into scalable outcomes. Paired with the necessary authority, budget, and the ability to draw on external expertise, this approach enables faster execution while maintaining alignment with operational workflows.

> *Rather than relying on a centralized AI function to identify use cases, successful organisations allowed budget holders and domain managers to surface problems, vet tools, and lead rollouts. This bottom-up sourcing, paired with executive accountability, accelerated adoption while preserving operational fit.*

- „State of AI in Business“ published in 2025 by Project NANDA at MIT

Companies still believe in self made solutions…



…while research shows that **tool partnerships are more successful**

[…] external partnerships with learning-capable, customized tools reached deployment ~67% of the time, compared to ~33% for internally built tools.

- „State of AI in Business“ published in 2025 by Project NANDA at MIT

Data and process integration is key

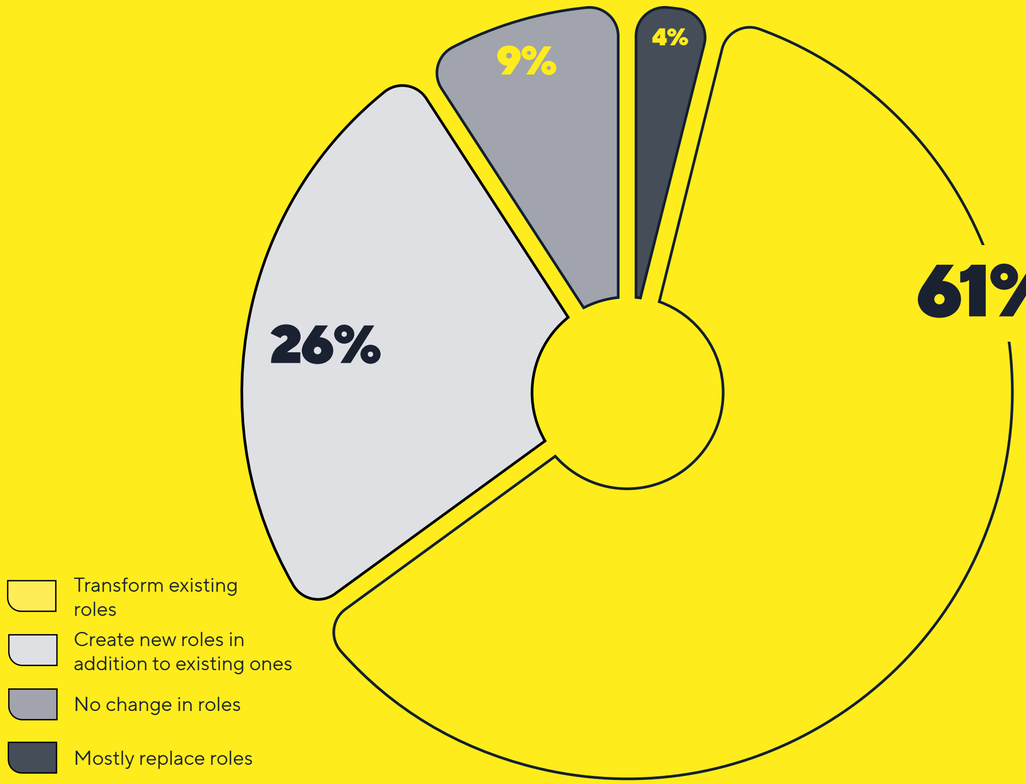
But over 90% of the participants report that their company's AI tools...

...are not connected to the main design pipeline

Instead of retrofitting automation to fit existing workflows, executives must strip operating models down to the studs to deliver real productivity gains.

- „Augmented work for an automated AI-driven world", published in 2023 by IBM

Employees and management believe in transformation



61% Say AI will mostly **transform existing roles**

Employees shall be reskilled while more than half report NO budget or time allocated

Overall, generative AI will augment far more employees than it will replace — 87% of executives believe job roles are more likely to be augmented than automated.

- „Augmented work for an automated AI-driven world", published in 2023 by IBM

And despite challenges, a positive vision clearly exists

Out of our respondents,

the majority believe the impact of AI is positive & half are convinced that AI will free up more time for creative work

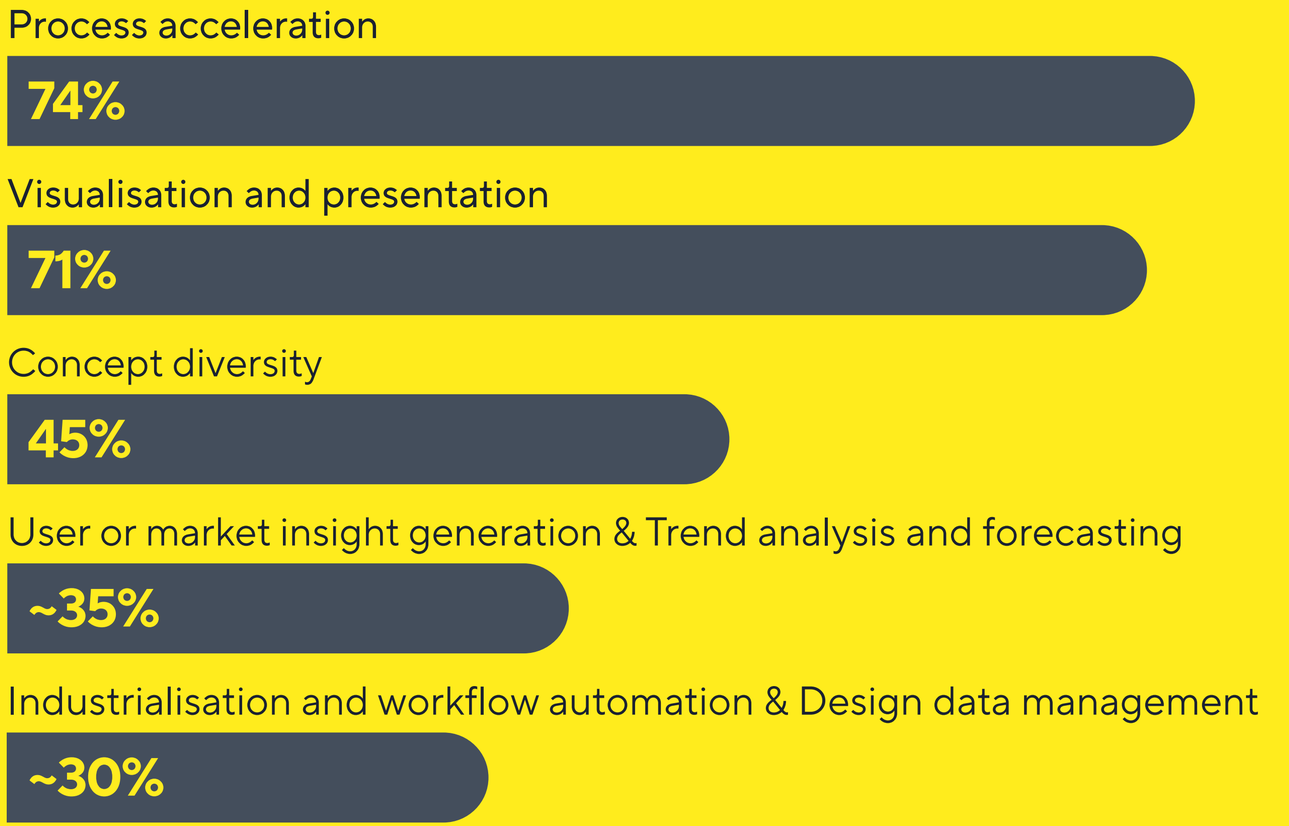
Similar expectations have been observed in studies by McKinsey, BCG and MIT, highlighting that the gap lies in execution, not belief.

Employees know what skills they need

Top five future skills, by importance

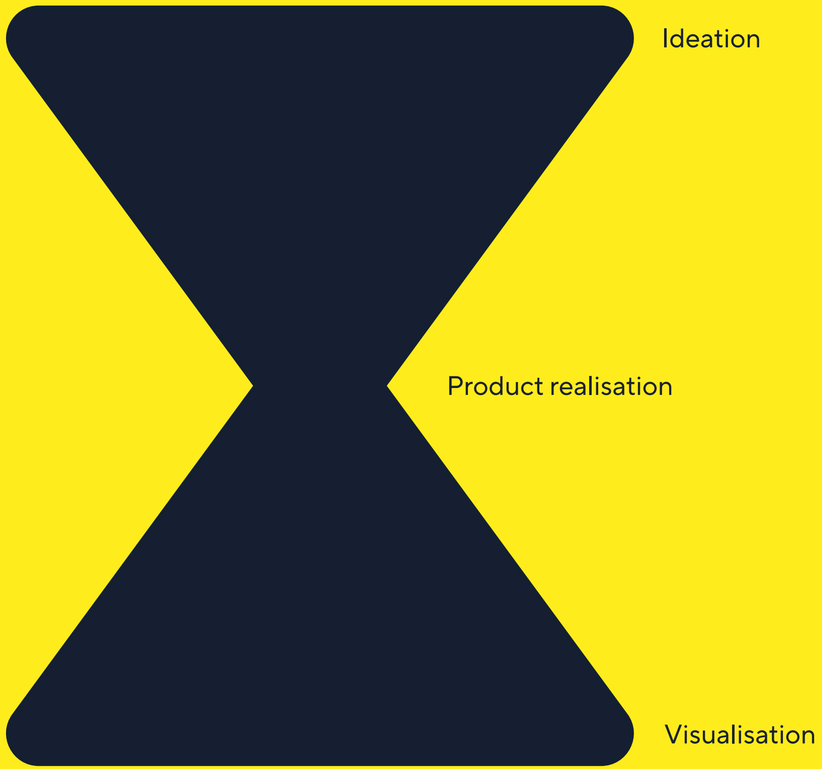
1. **Critical evaluation of AI output**
2. **Workflow automation & scripting**
3. **Creative prompting & ideation**
4. **Translating design intent into AI parameters**
5. **Cross-functional collaboration with engineering & data**

Future opportunities for AI implementation



Rewind: **In 2023, not many respondents believed HMI to be impacted by AI**. However, it has since become clear that digital-to-digital solutions are an easier entry point for AI implementation.

Hopes for process acceleration are high (74%) but...



...only 10% report AI use in modelling or validation

This creates a chokepoint:
Faster idea generation gives the illusion of speed and progress, while the underlying groundwork stagnates.
Validation and realisation continue at the same pace and still depend on expertise and experience that respondents fear may be eroded.

As a result, the actual impact on the final product remains almost invisible at this stage.

<<< Rewind: **In 2023, respondents expressed high expectations for AI adoption in modelling and validation.** Today, however, these areas still appear largely unchanged. <<<

Conclusion

Taken together, our findings reveal a consistent pattern across organisations. AI is widely adopted at an individual level, supported by a generally positive vision and strong expectations around process acceleration and creativity. Yet this individual momentum fails to translate into organisational capability. AI initiatives remain fragmented across in-house solutions, parallel tool landscapes and third-party applications, preventing scale and integration.

As a result, AI is primarily applied where risk is low and impact is indirect, while critical domains such as modelling, validation, industrialisation and design data management remain largely untouched. This creates a structural chokepoint: despite high expectations for process acceleration, AI rarely influences the stages where final product decisions are made.

Teams emerge as the key leverage point in this dynamic. Where dedicated AI teams exist, challenges become visible, integration improves and trust increases. Where they do not, organisations struggle with misalignment, unreliability and stalled impact. Ultimately, the limiting factor is not belief, technology or individual competence, but organisational readiness. AI will only move from experimentation to value once organisations are willing to treat it as a shared, governed and integrated design capability.

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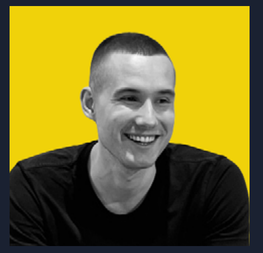

Joshua Reer
Design Expert

Study Background & Methodology

This study was conducted in the period from 10th November 2025 to 10th December 2025. The aim of the survey was to gain an understanding of the current state of AI in the design departments of the automotive industry and to study the development between 2023 and 2025. Therefore the numbers included in the survey use results from both years when used for drawing comparisons.
A total of 596 people took part in the study. The sample includes permanent and part-time designers in the automotive sector. The study was distributed worldwide.
The data was collected using an online questionnaire. Participation in the study was voluntary, anonymous (no IP address was retrieved) and unpaid. The data collected were processed and analysed in accordance with the applicable data protection guidelines.

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