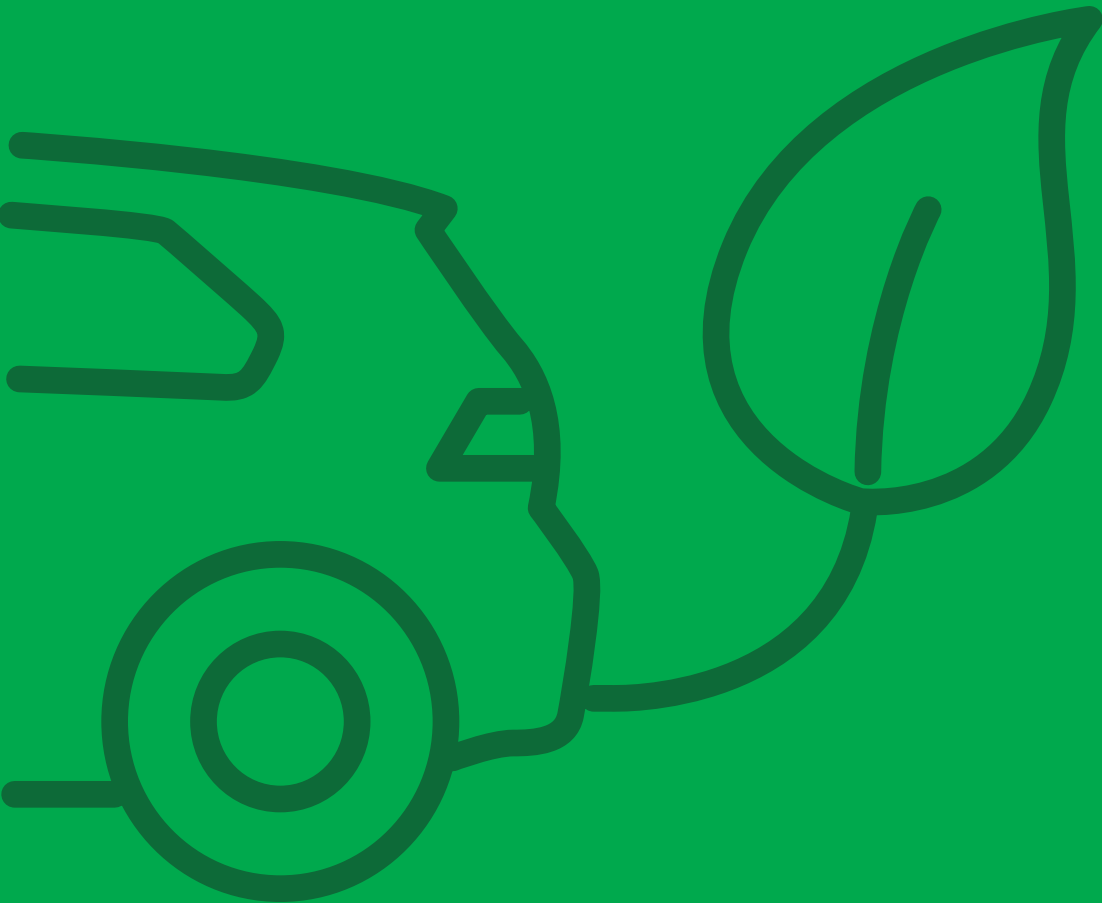




## 2022 Global Automotive Consumer Study

Key findings: EMEA  
March 2022



For over a decade, Deloitte has been exploring automotive consumer trends impacting a rapidly evolving global mobility ecosystem.

**Key insights from our Global Automotive Consumer Study over the years:**

- 2010 — Overall value ranked as the primary factor when evaluating brands
- 2011 — “Cockpit technology” and the shopping experience-led differentiators
- 2012 — Interest in hybrids driven by cost and convenience, while interest in connectivity centers on safety
- 2014 — Shared mobility emerges as an alternative to owning a vehicle
- 2017 — Interest in full autonomy grows, but consumers want a track record of safety
- 2018 — Consumers in many global markets continue to move away from internal combustion engines (ICE)
- 2019 — Consumers “pump the brakes” on interest in autonomous vehicles
- 2020 — Questions remain regarding consumers’ willingness to pay for advanced technologies
- 2021 — Online sales gaining traction, but majority of consumers still want in-person purchase experience

The Global Automotive Consumer Study informs Deloitte’s point of view on the evolution of mobility, smart cities, connectivity, transportation, and other issues surrounding the movement of people and goods.

# 2022 Deloitte Global Automotive Consumer Study

From September through October 2021, Deloitte surveyed more than 26,000 consumers in 25 countries to explore opinions regarding a variety of critical issues impacting the automotive sector, including the development of advanced technologies. The overall goal of this annual study is to answer important questions that can help companies prioritize and better position their business strategies and investments.

01

**Willingness to pay more for advanced or greener tech remains limited**

Consumers are generally unwilling to pay more for advanced technologies. Across the whole of the EMEA region there is an expectation that new vehicles will offer the latest infotainment systems and safety features as standard.

02

**The gradual shift to EVs is driven by lower running costs and concern about climate change**

Although internal combustion engine vehicles (ICEs) continue to dominate, there is growing interest in hybrid and electrified vehicles (EVs). The interest in EVs centres on the perception of lower fuel costs and environmental consciousness. However, driving range and lack of available charging infrastructure remain barriers to adoption.

03

**In-person purchase experience still preferred over online or click and collect**

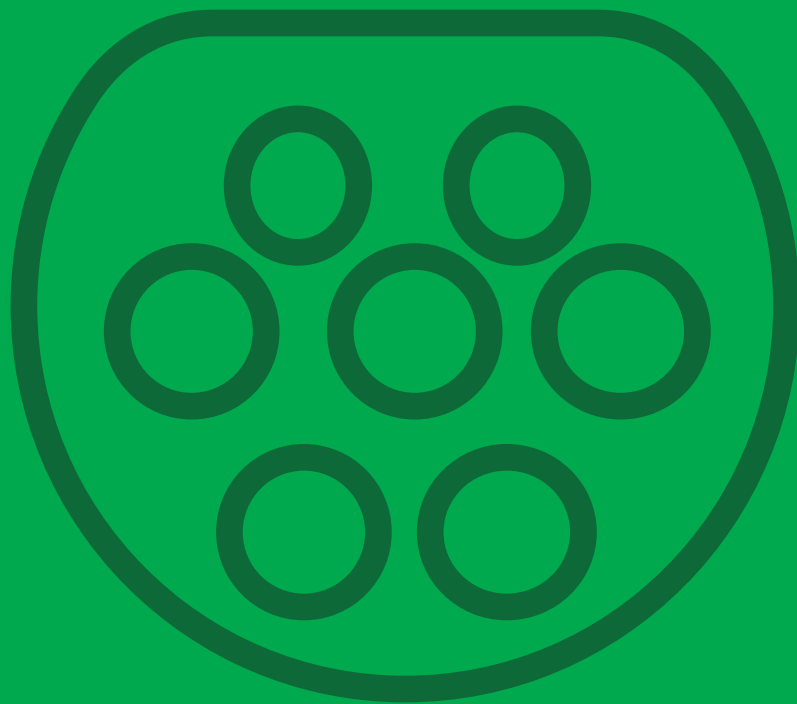
Despite manufacturers and dealers making efforts to scale up their online and click and collect offerings during the pandemic, most consumers would still prefer to purchase a vehicle in-person at an authorized dealership.

04

**Personal vehicles are overwhelmingly the preferred mode of transportation**

Shared mobility services like ride-hailing and car sharing have been slow to return to their pre-pandemic pace of growth. Consumers across the EMEA region would prefer to use personal vehicles or public transport to satisfy their mobility requirements.

# Advanced technologies and vehicle connectivity



# Consumer willingness to pay for advanced technologies including alternative powertrains and vehicle connectivity is limited in most EMEA markets.

**Percentage of consumers that are unwilling to pay more than ~€400<sup>1</sup> for a vehicle with advanced technologies (including people that would**

Advanced Technology Category	Austria	Belgium	Czech Republic	France	Germany	Italy	Poland	Romania	South Africa	Spain	UK
Safety	66%	79%	89%	76%	70%	69%	59%	51%	52%	66%	66%
Connectivity	81%	86%	90%	82%	77%	77%	71%	60%	58%	77%	70%
Infotainment	87%	89%	92%	87%	82%	81%	81%	68%	65%	80%	73%
Autonomy	70%	77%	86%	76%	69%	64%	66%	53%	42%	66%	65%
Alternative engine solutions	55%	62%	84%	64%	56%	48%	48%	39%	40%	54%	52%
Unwilling to pay more than...	€400	€400	CZK 75,000	€400	€400	€400	PLN 1,000	RON 2,500	RAND 8,000	€400	£400

<sup>1</sup> Calculated for each country in local market currency (roughly equivalent to \$US500/€400)

Q3. How much more would you be willing to pay for a vehicle that had each of the technologies listed below?

Sample size: Austria = 979; Belgium = 945; Czech Republic = 891; France = 925; Germany = 1,401; Italy = 947; Poland = 928; Romania = 778; South Africa = 964; Spain = 940; UK = 1,377

The majority of consumers are willing to share personal data in exchange for an improved driving experience. Consumers are most interested in updates related to congestion, safety or vehicle health.

**Percentage of consumers interested in sharing their personal data for 'connected benefits'**

Interest (somewhat/very interested) in a connected vehicle if it provides benefits related to...	Austria	Belgium	Czech Republic	France	Germany	Italy	Poland	Romania	South Africa	Spain	UK
Updates regarding traffic congestion and suggested alternate routes	57%	61%	57%	60%	55%	63%	56%	68%	79%	62%	62%
Suggestions regarding safer routes (i.e., avoid unpaved roads)	40%	47%	44%	45%	41%	61%	51%	66%	76%	59%	51%
Updates to improve road safety and prevent potential collisions	53%	60%	50%	59%	51%	71%	61%	74%	81%	69%	57%
Customized/optimized vehicle insurance plan	38%	47%	35%	48%	38%	65%	46%	63%	72%	58%	51%
Maintenance updates and vehicle health reporting	55%	60%	54%	59%	54%	66%	56%	71%	80%	69%	59%
Maintenance cost forecasts based on your driving habits	43%	54%	38%	57%	44%	61%	50%	65%	73%	60%	52%
Customized suggestions regarding ways to minimize service expenses	45%	53%	41%	52%	45%	62%	52%	64%	76%	56%	49%
Over-the-air vehicle software updates	52%	46%	41%	52%	53%	54%	53%	54%	62%	52%	48%
Access to nearby parking (i.e., availability, booking, and payment)	46%	43%	41%	44%	46%	56%	52%	66%	66%	58%	52%
Special offers regarding non-automotive products and services related to your journey or destination	21%	27%	19%	31%	29%	44%	35%	48%	57%	44%	41%
Receiving a discount for access to a Wi-Fi connection in your vehicle	30%	37%	33%	36%	35%	45%	44%	56%	70%	48%	46%

Top three interests

Q34. How interested are you in the following benefits of a connected vehicle if it meant sharing your own personal data and vehicle/operational data with the manufacturer or a third party?

Sample size: Austria = 932; Belgium = 949; Czech Republic = 845; France = 881; Germany = 1,303; Italy = 893; Poland = 945; Romania = 786; South Africa = 970; Spain = 904; UK = 1,364

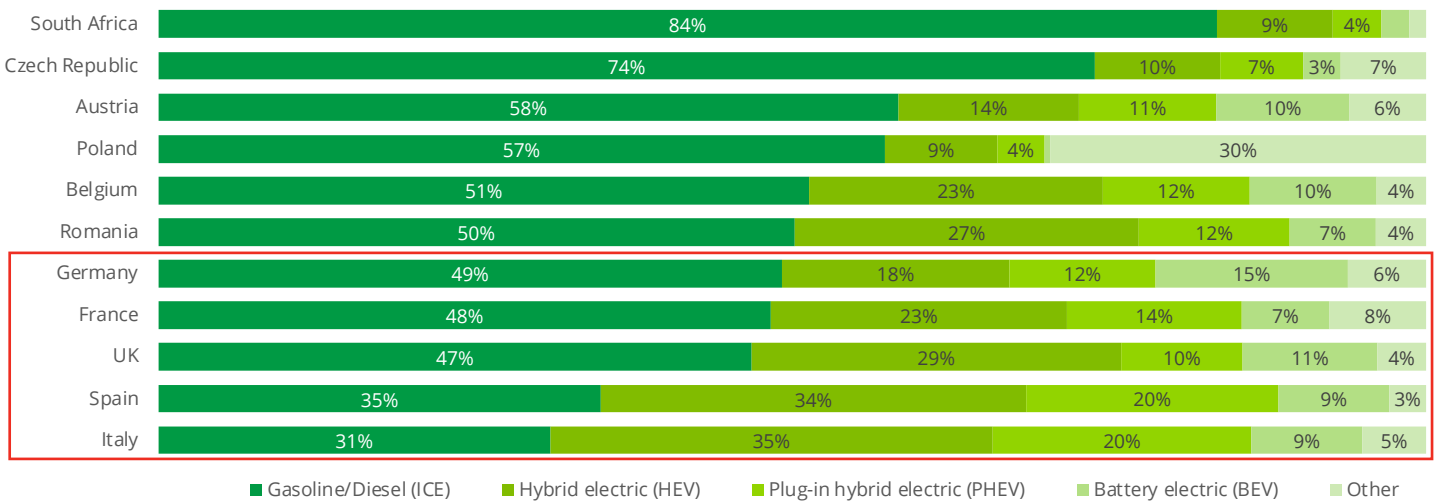
# Vehicle electrification





Consumers continue to make a gradual shift towards alternative powertrains. It is noteworthy that across five of the largest car markets in the region, the number of consumers intending to buy an ICE as their next vehicle has dipped below 50%.

**Consumer powertrain preferences for their next vehicle**



**Note:** "Other" includes engine types such as compressed natural gas, ethanol, and hydrogen fuel cells; did not consider "don't know" responses

Q25. What type of engine would you prefer in your next vehicle?

Sample size: Austria = 793; Belgium = 769; Czech Republic = 732; France = 749; Germany = 1,150; Italy = 799; Poland = 834; Romania = 731; South Africa = 940; Spain = 799; UK = 1,226

For the most part, people are drawn to an EV because of an expectation of lower fuel costs, or because they are concerned about climate change and want to reduce emissions.

**Factors that impact the decision to acquire an electrified vehicle**

Factors	Austria	Belgium	Czech Republic	France	Germany	Italy	Poland	Romania	South Africa	Spain	UK
Concern about climate change/ reduced emissions	1	2	2	2	1	1	2	2	1	1	1
Lower fuel costs	2	1	1	1	2	2	1	1	2	2	2
Concern about personal health	3	4	6	4	4	3	3	3	3	3	3
Less maintenance	6	5	4	5	7	6	6	6	5	5	5
Better driving experience	7	6	3	6	5	5	4	5	4	4	4
Government incentives / stimulus programs	4	7	6	3	3	4	7	4	7	6	7
Potential for extra taxes/levies applied to internal combustion vehicles	5	3	5	7	6	7	5	7	6	7	6

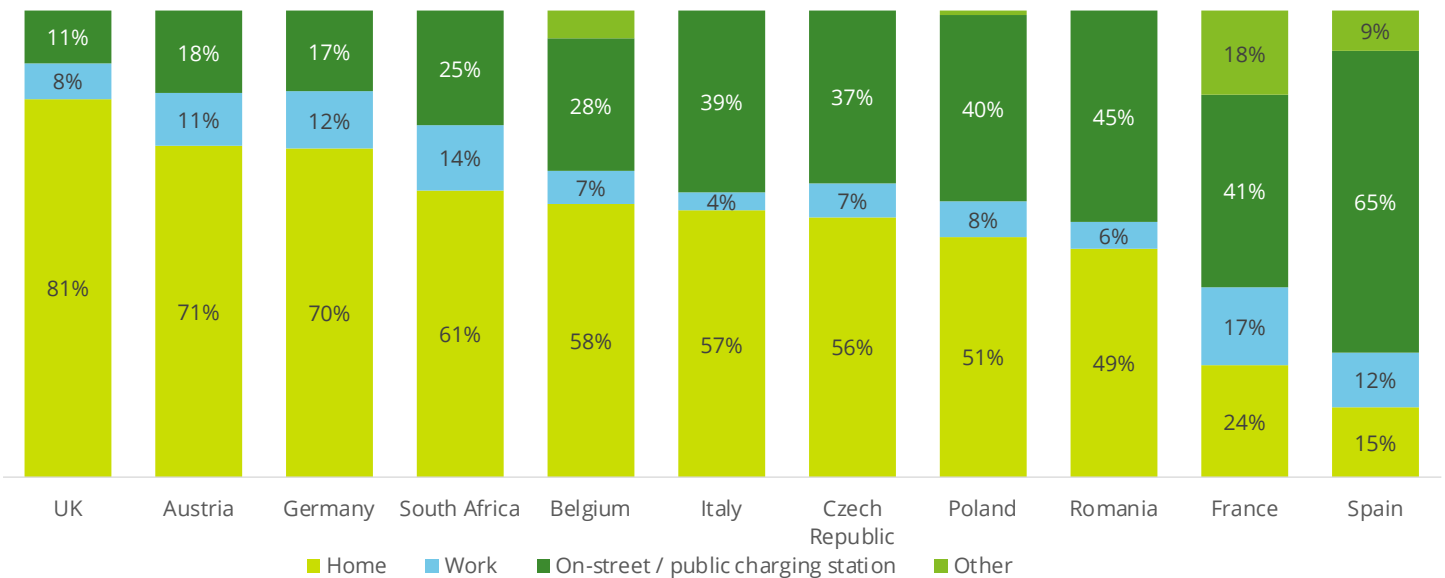
■ Top three factors

Q26. Please rank the following factors in terms of their impact on your decision to acquire an electrified vehicle (highest to lowest).

Sample size: Austria = 282; Belgium = 344; Czech Republic = 142; France = 330; Germany = 513; Italy = 512; Poland = 288; Romania = 335; South Africa = 143; Spain = 497; UK = 605

Most consumers in the region plan to charge their PHEV/BEVs at home. However, demand for on-street and public charging is high in Poland, Romania, and – in particular - France and Spain.

**Expecting to charge electrified vehicle most often at...**

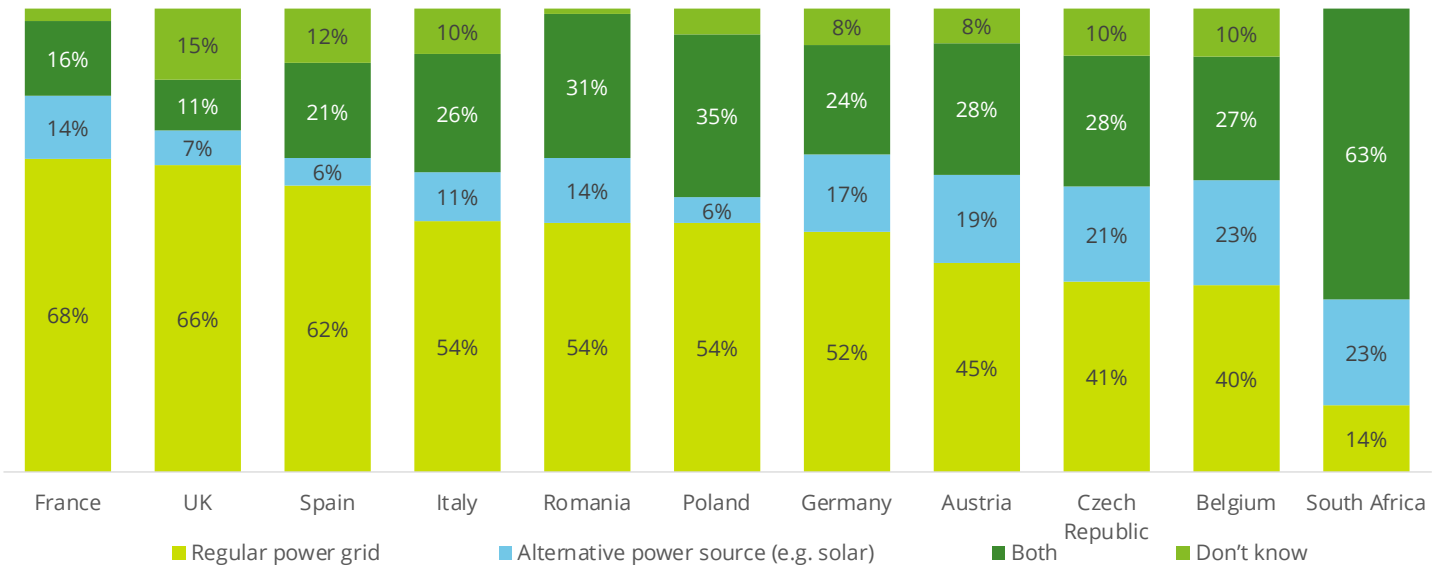


Q27. Where do you expect to charge your electrified vehicle most often?

Sample size: Austria = 169; Belgium = 166; Czech Republic = 70; France = 155; Germany = 307; Italy = 233; Poland = 105; Romania = 137; South Africa = 57; Spain = 229; UK = 248

Most consumers expect to use the regular power grid, either exclusively, or in combination with an alternative power source to charge their PHEV/BEV at home.

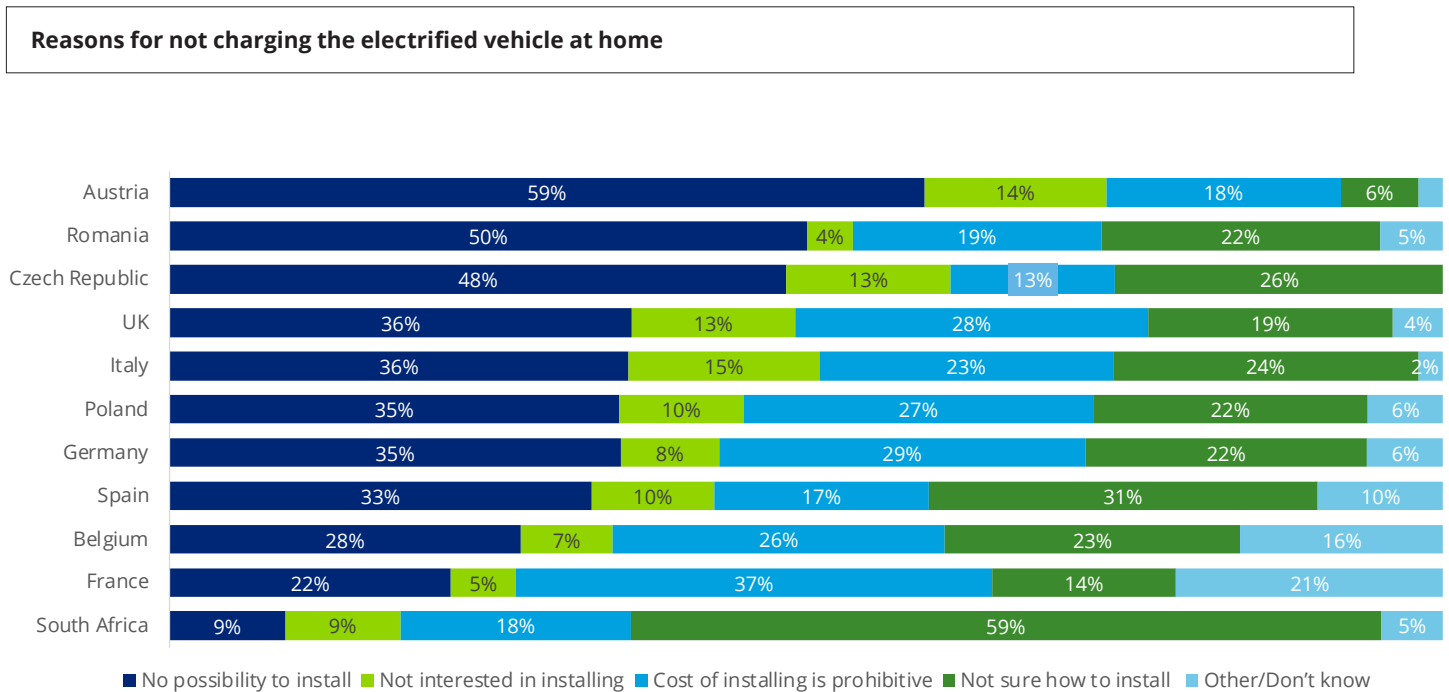
Intending to charge electric vehicles at home using...



Q28. How do you intend to charge your electrified vehicle at home?

Sample size: Austria = 120; Belgium = 97; Czech Republic = 39; France = 37; Germany = 216; Italy = 133; Poland = 54; Romania = 67; South Africa = 35; Spain = 34; UK = 201

Consumers not planning to charge a PHEV/BEV at home say they either can't install a charger or the cost of installing a charger is prohibitive.



Q29. What is the main reason you do not intend to charge your electrified vehicle at home?

Sample size: Austria = 49; Belgium = 69; Czech Republic = 31; France = 118; Germany = 91; Italy = 100; Poland = 51; Romania = 70; South Africa = 22; Spain = 195; UK = 47

Consumers who said they are not considering an EV as their next vehicle cited range anxiety and a lack of public charging infrastructure as their biggest concerns.

**Greatest concern regarding all battery-powered electric vehicles**

Factors	Austria	Belgium	Czech Republic	France	Germany	Italy	Poland	Romania	South Africa	Spain	UK
Driving range	21%	21%	10%	25%	24%	22%	22%	16%	12%	21%	21%
Cost/price premium	13%	25%	10%	18%	12%	12%	16%	15%	10%	17%	18%
Uncertain resale value	3%	2%	3%	3%	2%	3%	2%	1%	4%	2%	2%
Potential for extra taxes/levies associated with BEVs	1%	3%	2%	2%	2%	3%	3%	2%	2%	3%	4%
Time required to charge	8%	8%	13%	10%	9%	11%	9%	12%	9%	11%	9%
Lack of public electric vehicle charging infrastructure	9%	11%	19%	12%	14%	19%	21%	23%	30%	18%	14%
Lack of charger at home	9%	8%	5%	8%	10%	10%	9%	8%	5%	9%	11%
Lack of alternate power source (e.g., solar) at home	4%	4%	6%	3%	4%	3%	3%	4%	7%	5%	3%
Safety concerns with battery technology	6%	4%	8%	4%	8%	5%	3%	4%	6%	5%	5%
Lack of sustainability (i.e., battery manufacturing/recycling)	20%	6%	12%	9%	10%	7%	5%	7%	6%	5%	6%
Lack of choice	1%	1%	2%	2%	3%	2%	1%	2%	2%	1%	3%

 Greatest concern

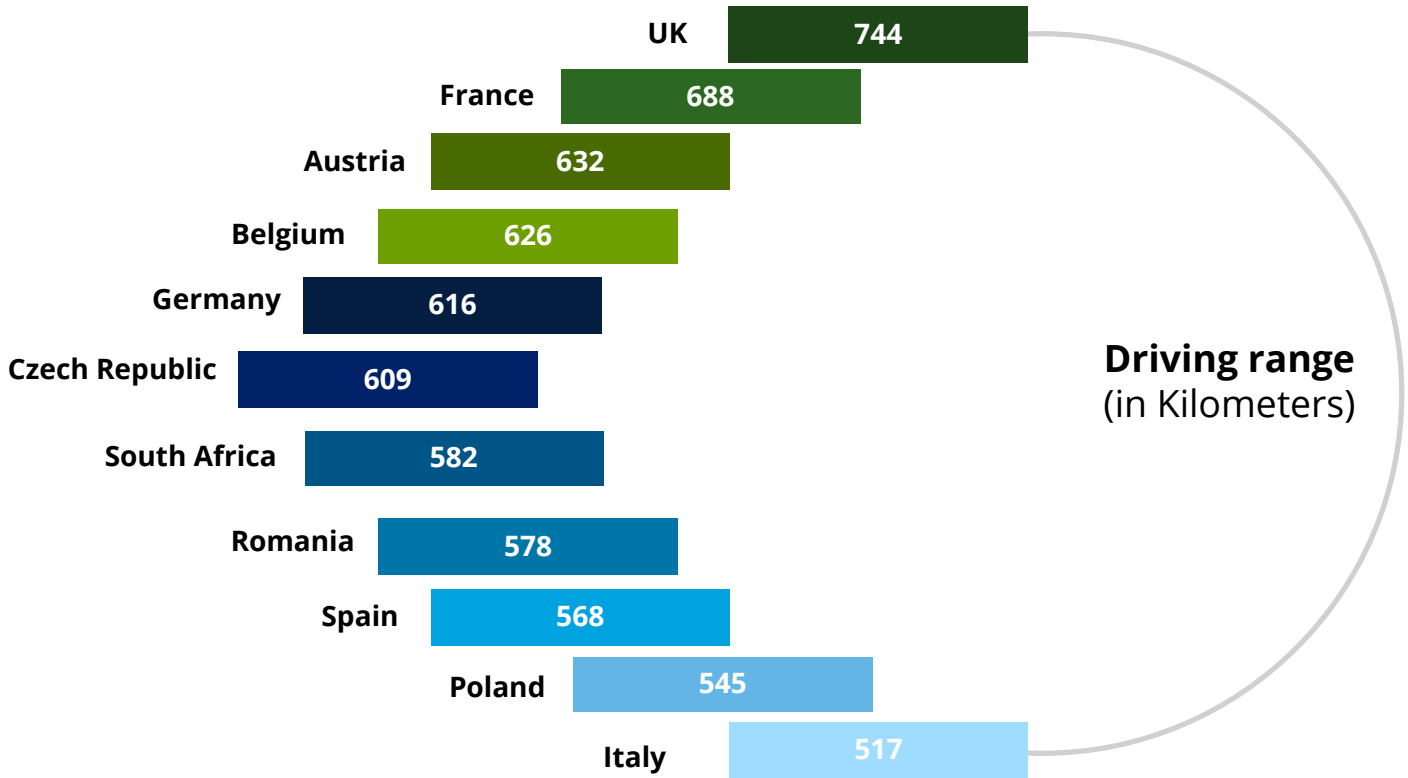
Note: Sum of “concerns” for a market may not add to 100% as “Other” and “Don’t know” percentages are not shown

Q31. What is your greatest concern regarding all battery-powered electric vehicles?

Sample size: Austria = 932; Belgium =949; Czech Republic = 845; France = 881; Germany = 1,303; Italy = 893; Poland = 945; Romania = 786; South Africa = 970; Spain = 904; UK = 1,364

ICE drivers would require EVs to have significantly improved driving range before they considered purchasing one. In the UK, ICE drivers would expect a fully-charged BEV driving range to be north of 700 Kilometers.

Consumer expectation of driving range from a fully charged all-battery electric vehicle

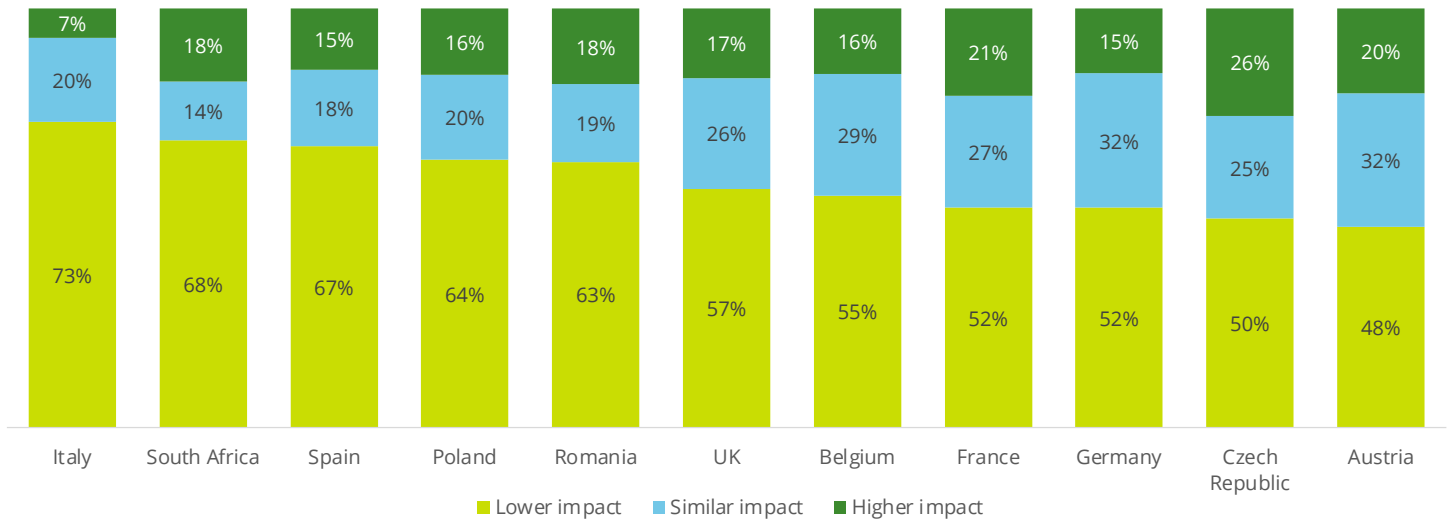


Q32. How much driving range would a fully charged all-battery electric vehicle need to have in order for you to consider acquiring one?

Sample size: Austria = 849; Belgium = 872; Czech Republic = 823; France = 829; Germany = 1,129; Italy = 823; Poland = 914; Romania = 735; South Africa = 949; Spain = 834; UK = 1,234

Most consumers expect EVs to have a lower impact on the environment. However EVs are not unilaterally seen as an environmental improvement. This is likely driven by concerns over the manufacturing process and how electricity is generated.

**Comparison of all-battery electric vehicles with internal combustion vehicles from an environmental impact point of view**



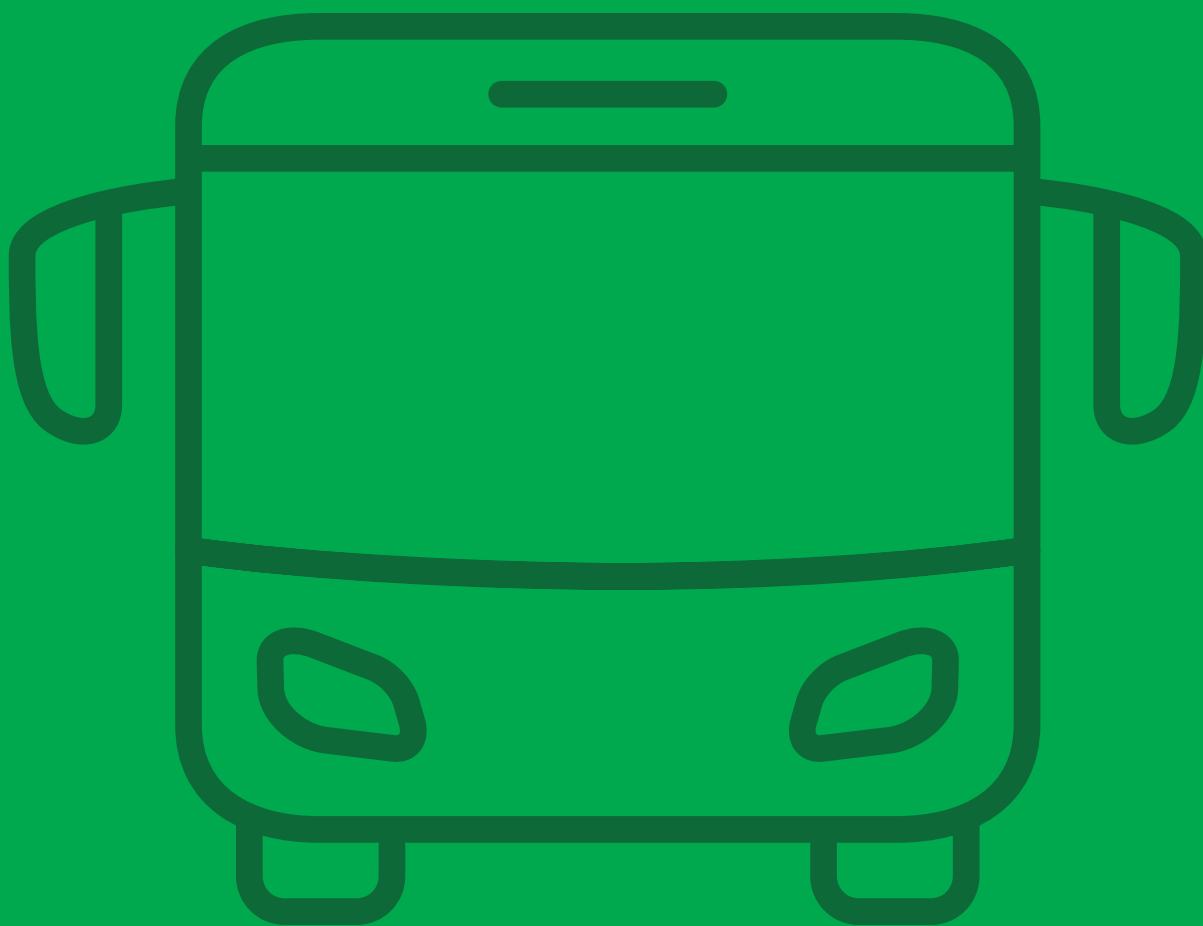
Note: Did not consider “Don’t know” responses

Q33. In your opinion, how do all-battery electric vehicles compare to internal combustion vehicles from an environmental impact point of view?

Sample size: Austria = 851; Belgium = 781; Czech Republic = 757; France = 787; Germany = 1,194; Italy = 812; Poland = 879; Romania = 713; South Africa = 884; Spain = 802; UK = 1,193

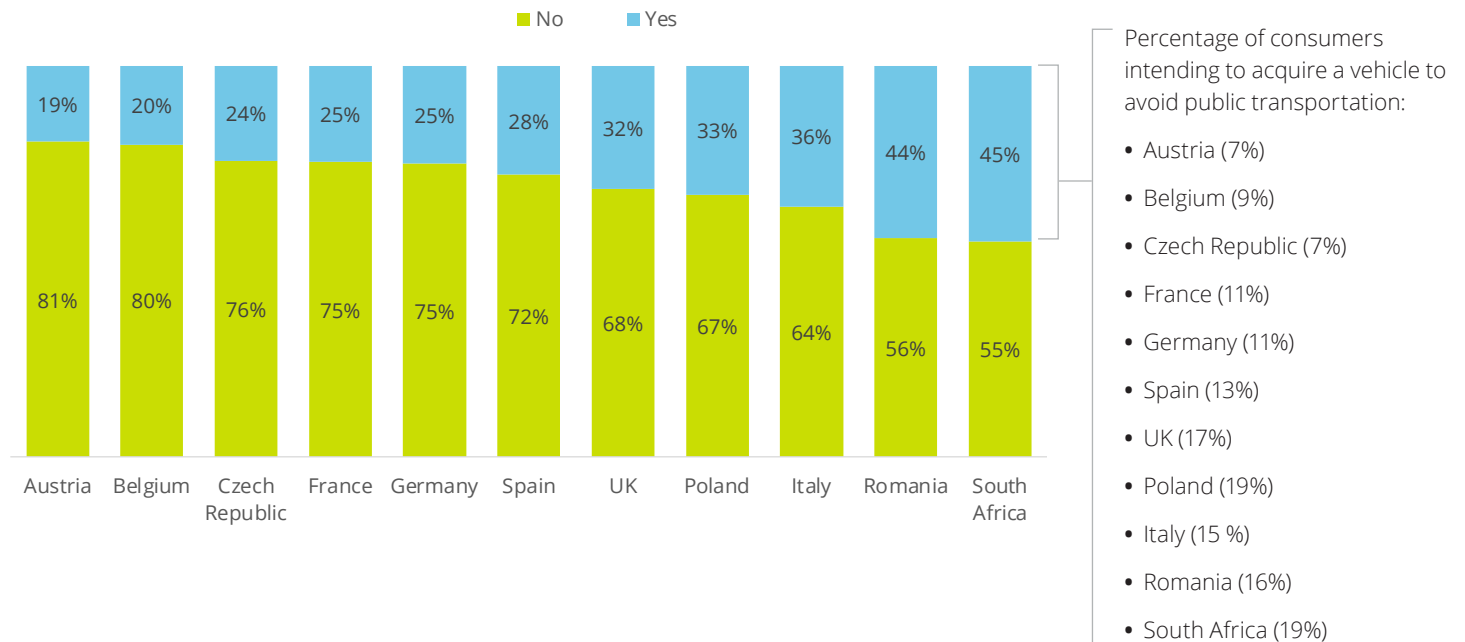


# Future vehicle intentions



COVID-19 has had a noticeable impact on consumers plans to purchase their next vehicle. The desire to avoid public transportation has been a key consideration in some consumers decision making process.

**Impact of COVID-19 on next vehicle purchase**

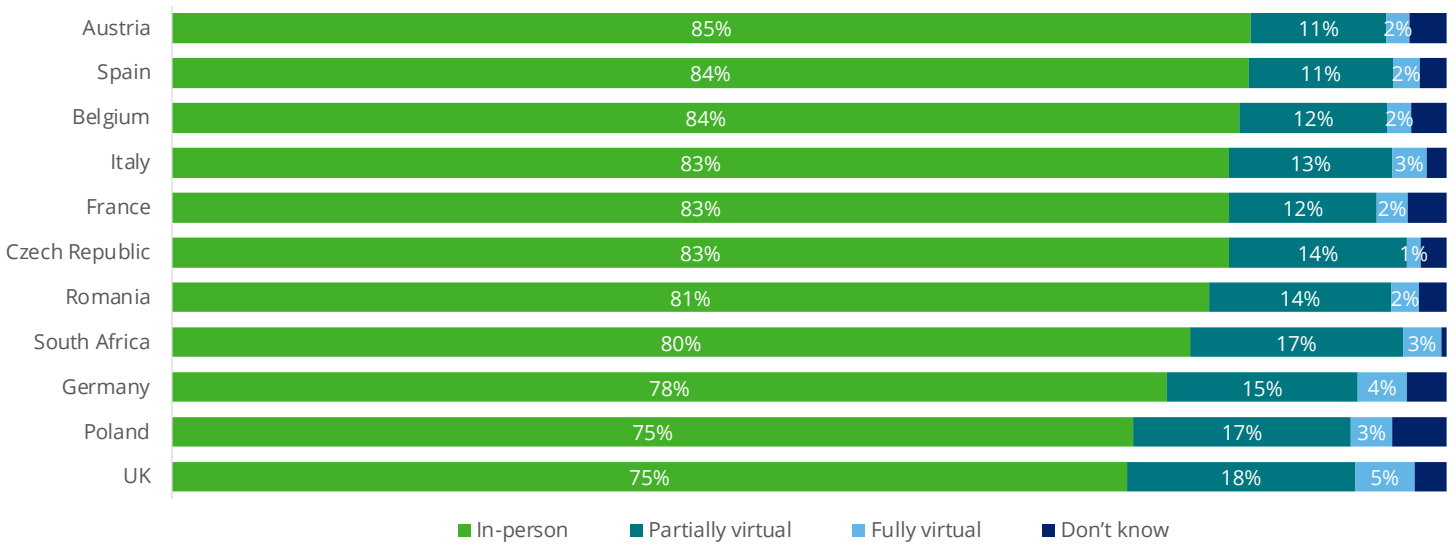


Q15. Has the global COVID-19 pandemic had an impact on your decision to purchase your next vehicle?

Sample size: Austria = 1,042; Belgium= 1,046; Czech Republic = 1,006; France = 1,005; Germany = 1,507; Italy = 1,003; Poland = 1,007; Romania = 846; South Africa = 1,011; Spain = 1,013; UK = 1,506

Despite efforts by OEMs and dealers to scale up their online and click and collect capabilities during the pandemic, consumers overwhelmingly prefer an in-person experience.

**Most preferred way to acquire next vehicle**

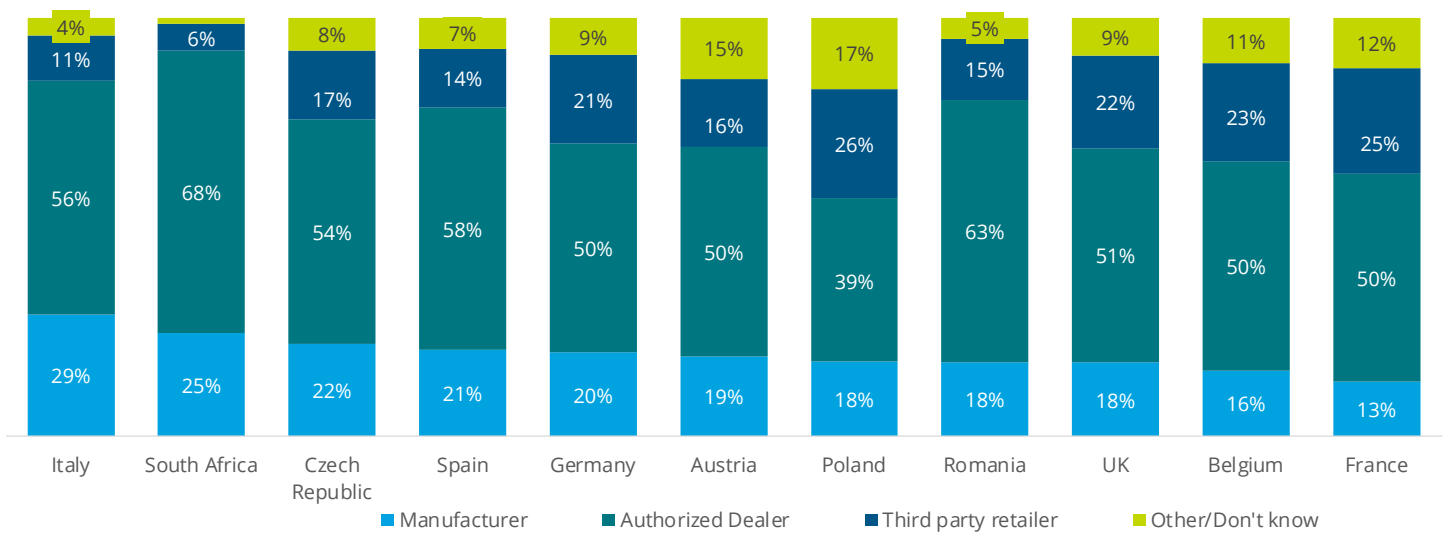


Q35. How would you most prefer to acquire your next vehicle?

Sample size: Austria = 932; Belgium = 949; Czech Republic = 845; France = 881; Germany = 1,303; Italy = 893; Poland = 945; Romania = 786; South Africa = 970; Spain = 904; UK = 1,364

Consumers who plan to purchase virtually would prefer to buy from an authorized dealer over a manufacturer or third party retailer.

Prefer to acquire next vehicle via a virtual process from...

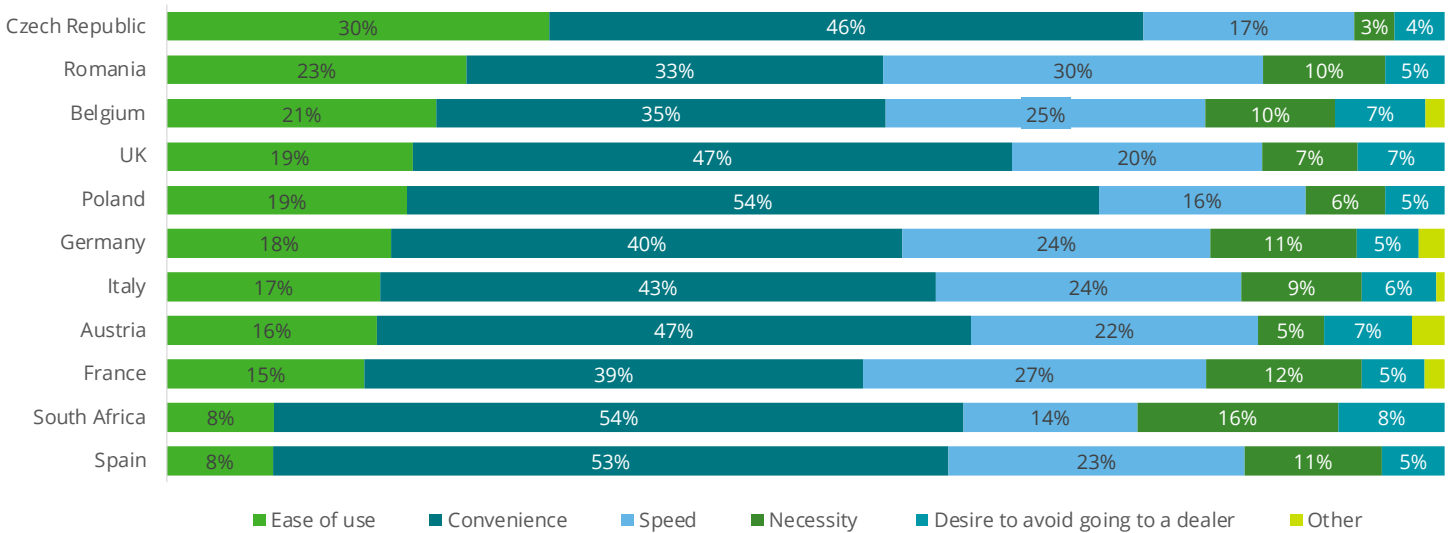


Q36. From whom would you most prefer to acquire your next vehicle via a virtual process?

Sample size: Austria = 116; Belgium = 128; Czech Republic = 127; France = 123; Germany = 245; Italy = 138; Poland = 192; Romania = 129; South Africa = 191; Spain = 121; UK = 307

Convenience is the main reason consumers would consider a virtual process for acquiring their next vehicle. Speed is also a key consideration for consumers in most markets.

**Main reason to acquire next vehicle via a virtual process**



Q37. What is the main reason you would prefer to acquire your next vehicle via a virtual process?

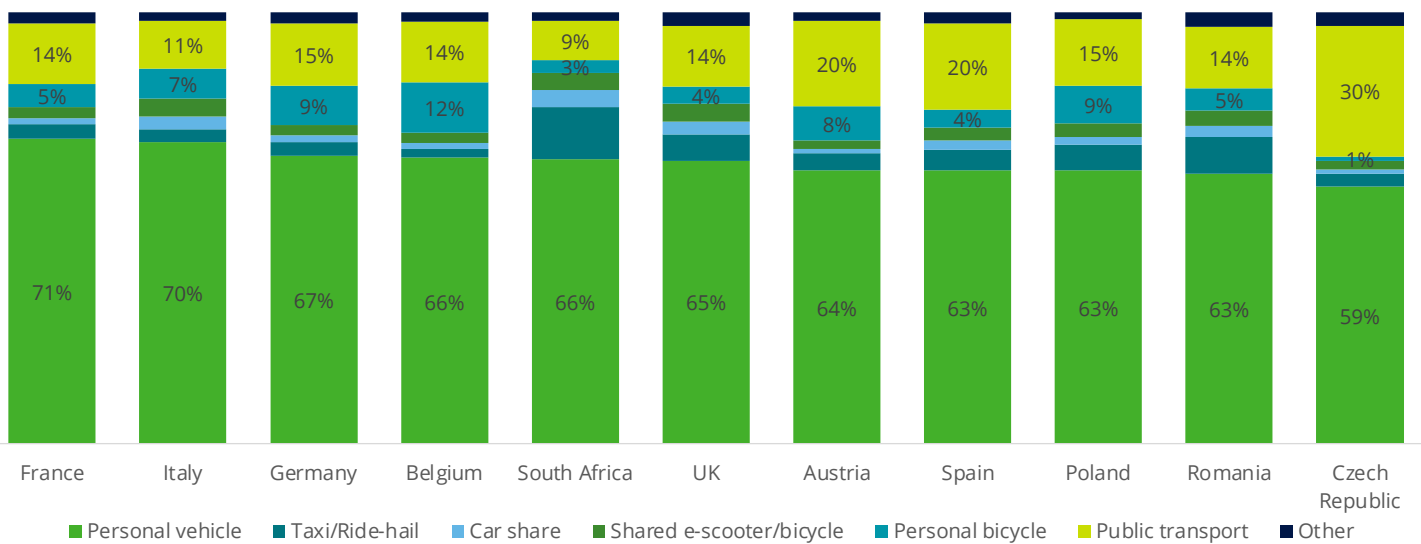
Sample size: Austria = 116; Belgium = 128; Czech Republic = 127; France = 123; Germany = 245; Italy = 138; Poland = 192; Romania = 129; South Africa = 191; Spain = 121; UK = 307

# Mobility services



Most consumers plan to use their own personal vehicles to get around. However, in some markets, up to a fifth of mobility needs will be met by public transport.

Going forward, percentage of mobility needs will be met by...

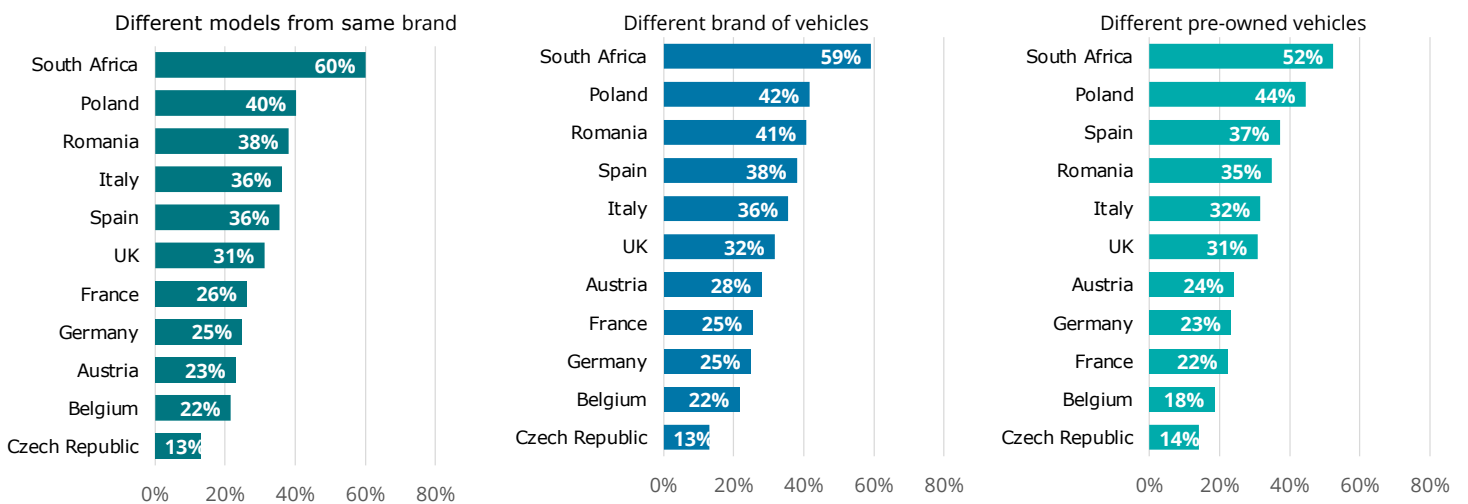


Q44. Going forward, what percentage of your mobility needs will be addressed by each of the following types of transportation?

Sample size: Austria = 1,042; Belgium = 1,046; Czech Republic = 1,006; France = 1,005; Germany = 1,507; Italy = 1,003; Poland = 1,007; Romania = 802; South Africa = 1,011; Spain = 1,013; UK = 1,506

The idea of a vehicle subscription service is substantially more interesting to consumers in South Africa compared to European markets.

Percentage of consumers who are somewhat/very interested in a subscription that allows access to...



Q45. How interested are you in each of the following scenarios?

Sample size: Austria = 1,042; Belgium = 1,046; Czech Republic = 1,006; France = 1,005; Germany = 1,507; Italy = 1,003; Poland = 1,007; Romania = 846; South Africa = 1,011; Spain = 1,013; UK = 1,506



# Consumers would most prefer a subscription service that focuses on convenience, flexibility, and availability of vehicles.

**Top three most important characteristics of a vehicle subscription**

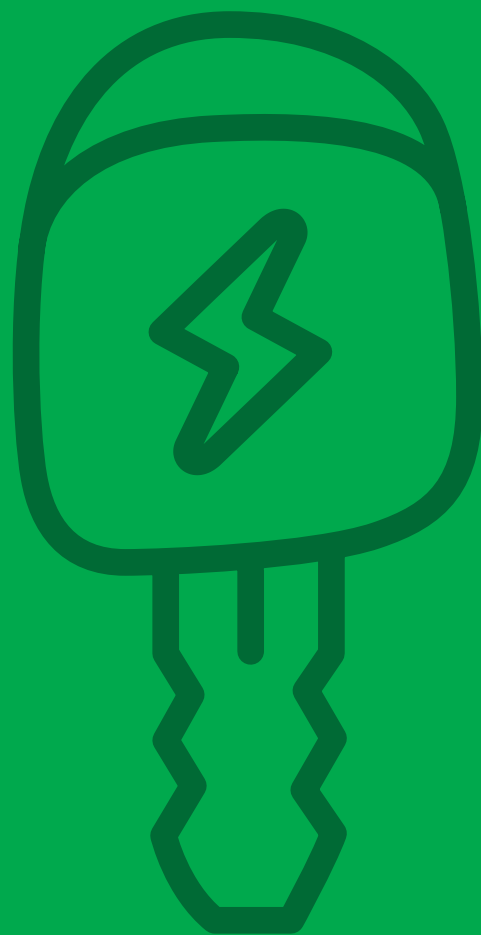
Factors	Austria	Belgium	Czech Republic	France	Germany	Italy	Poland	Romania	South Africa	Spain	UK
Convenience (e.g., all relevant services included, except for fuel)	1	1	1	1	1	1	1	1	1	1	1
Increased flexibility (e.g., shorter contract durations)	4	3	4	5	2	3	4	4	2	3	2
Possibility to exchange vehicles	6	4	2	3	5	2	2	3	3	4	3
Possibility to subscribe to a vehicle segment (e.g., SUVs) instead of a specific model	10	8	11	10	9	8	8	7	8	8	8
Possibility to subscribe to a specific model instead of a vehicle segment	12	9	10	13	10	10	11	9	13	10	10
Availability of vehicles (e.g., short delivery times)	2	2	3	2	3	4	3	5	6	2	4
Home delivery services (e.g., vehicle is dropped off and picked up at desired location)	8	7	6	7	6	6	7	8	9	6	6
Hassle-free online contract closing/ full digital customer journey	9	12	9	9	8	13	10	14	11	13	12
Full cost control due to transparent and predictable fixed monthly fees (e.g., no surprises via all-in offers)	3	5	7	4	4	5	6	6	5	5	5
Availability of complementary premium services (e.g., concierge services, valet parking)	14	14	14	14	14	11	14	13	14	14	14
Premium vehicles / brands offered	11	10	13	11	12	14	12	10	10	11	11
Selection of only brand-new vehicles (for a comparable higher monthly rate)	13	13	12	12	13	12	13	12	12	12	13
Selection of brand new as well as certified pre-owned vehicles (for a comparable lower monthly rate)	7	11	8	8	11	9	9	11	7	9	9
Possibility to test new vehicles for a certain period without consequences	5	6	5	6	7	7	5	2	4	7	7

■ Top 2 most important

Q47. What are the top three most important characteristics of a vehicle subscription?

Sample size: Austria = 1,042; Belgium = 1,046; Czech Republic = 1,006; France = 1,005; Germany = 1,507; Italy = 1,003; Poland = 1,007; Romania = 846; South Africa = 1,011; Spain = 1,013; UK = 1,506

# About the Study



# About the study

The 2022 study includes more than 26,000 consumer responses from 25 countries around the world.

North America	Sample
Canada (CA)	1,005
Mexico (MX)	1,003
United States (US)	1,031

EMEA	Sample
Austria (AT)	1,042
Belgium (BE)	1,046
Czech Republic (CZ)	1,006
France (FR)	1,005
Germany (DE)	1,507
Italy (IT)	1,003
Poland (PL)	1,007
Romania (RO)	846
South Africa (ZA)	1,011
Spain (ES)	1,013
United Kingdom (GB)	1,506

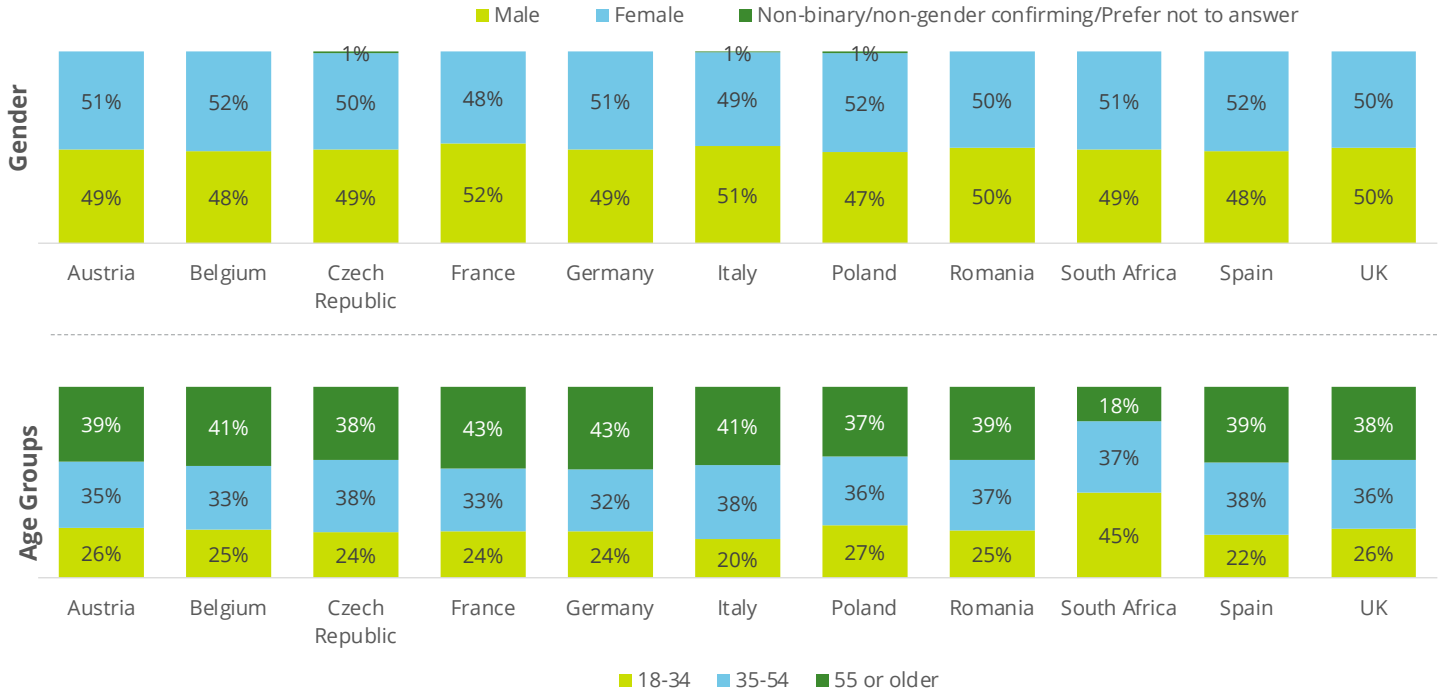
Asia-Pacific	Sample
Australia (AU)	1,027
China (CN)	1,022
India (IN)	1,006
Indonesia (ID)	1,001
Japan (JP)	1,000
Malaysia (MY)	1,005
Philippines (PH)	1,007
Republic of Korea (KR)	1,012
Singapore (SG)	1,015
Thailand (TH)	1,004
Vietnam (VN)	1,017

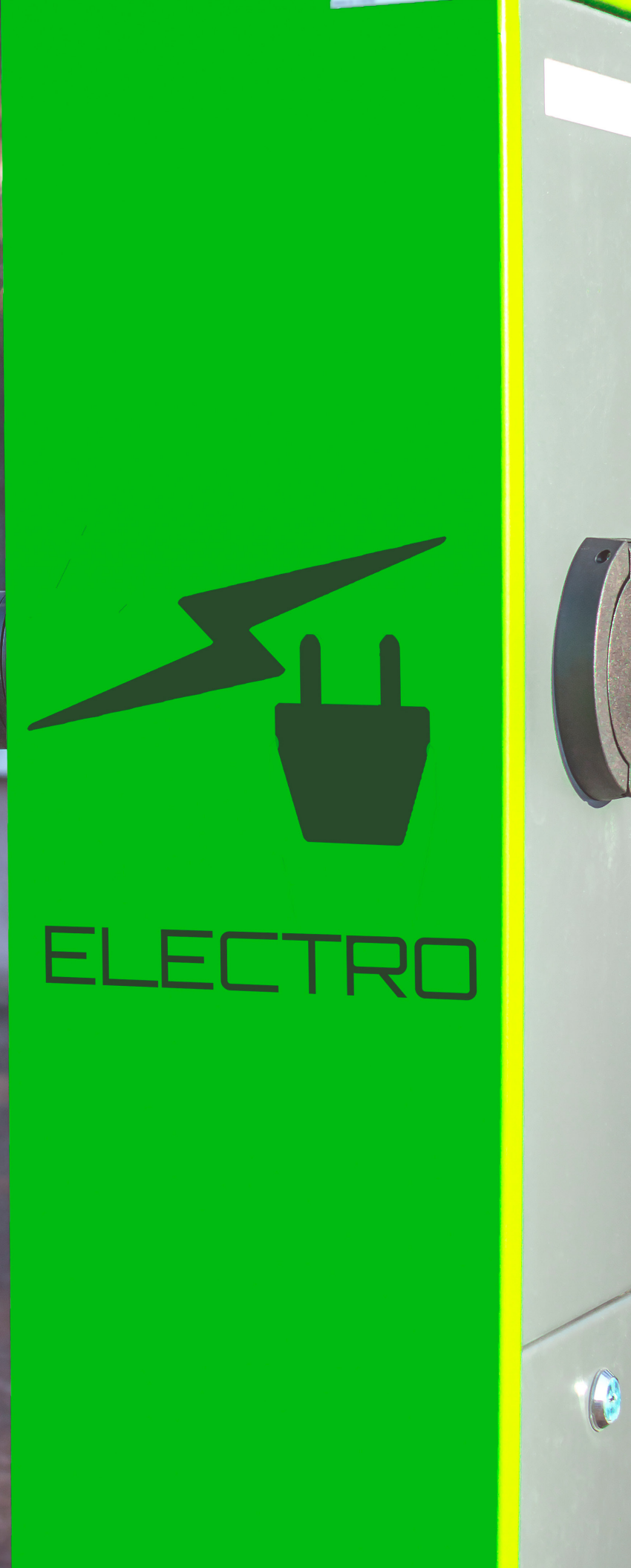
## Study methodology

The study is fielded using an online panel methodology where consumers of driving age are invited to complete the questionnaire (translated into local languages) via email.

**Note:** "Sample" represents the number of survey respondents in each country.

# Study demographics





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