



2025 Global Automotive Consumer Study

Key Findings: Global Focus Markets

January 2025

Dear reader,

The global automotive industry is undergoing a tremendous amount of change at an unprecedented pace. At the center of this change sits a consumer with rapidly evolving expectations of the mobility experience. Brand loyalty is taking center stage as emerging manufacturers with strong value propositions threaten to disrupt the dominance of traditional players in many global markets.

Electric vehicle sales momentum has slowed, but the longer-term need to move toward zero-emission transportation remains clear. Software-defined vehicles are affecting every aspect of the automotive value chain, requiring manufacturers to reimagine how cars are designed, built, sold, and driven. Connected vehicle features and advanced driver assistance systems (ADAS) are making mobility safer and more engaging. Artificial intelligence is powering an emerging generation of autonomous vehicle fleets, offering consumers new choices to move beyond personal ownership in favor of mobility-as-a-service (MaaS) solutions.

At the same time, vehicle transaction prices have reached new heights, exacerbated by pandemic-induced inventory shortages and supply chain shocks. This situation continues to impact cost-conscious consumers who are still digesting the negative effects of a prolonged period of high interest rates on their financial capacity.

Manufacturers and suppliers are also facing operational headwinds as they struggle to reduce manufacturing cost and complexity. Some of whom are recognizing they cannot maintain their competitive momentum alone, signaling a new era of 'co-opetition' to optimize limited resources for mutual benefit while lowering their risk exposure.

In addition, global trade tensions, tariffs, shifting regulatory policies, and labor disputes in some markets have the potential to change the way in which manufacturers view global supply chains, manufacturing footprints, and global growth opportunities.

In an effort to provide considerations for the auto industry as it navigates these intersecting issues, we developed our annual *Global Automotive Consumer Study* over a decade ago as a tool to view the sector through a consumer lens. As many industry executives have echoed through the years, the auto sector starts and ends with the consumer. As such, we have expanded the reach of the study this year to capture the opinions and behaviors of more than 30,000 consumers in 30 countries around the world.

We have focused this report on eight of the largest global auto markets, presenting key insights in four sections, covering electric vehicle adoption, future buying intentions, connectivity, and shared mobility. For more information, including a deeper dive of study results for all participating countries, please click [here](#) to access the online interactive dashboard.

We hope you find the insights contained in this report useful and informative.

Warm regards,



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Deloitte has been exploring key consumer trends impacting a rapidly evolving global mobility ecosystem for over a decade.

Key themes emerging over the years include:

- 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
- 2022** • Interest in electrified vehicles (EVs) grows, but worries about price, driving range, and charging time remain
- 2023** • The shift to EVs is primarily based on a strong consumer perception that it will significantly reduce vehicle operating costs
- 2024** • Consumer interest in EVs wanes in most markets due to high sticker prices, range anxiety, and charging infrastructure challenges

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

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Key findings



1 All-battery electric vehicle (BEV) inertia remains muted in most markets as interest in ICE and hybrid vehicles tick up

Consumer interest in full hybrids and range extender technology (i.e., no external charging plug) is gaining momentum in several global markets as consumers seek a “best of both worlds” solution to reduce fuel costs and lower emissions without the need for charging infrastructure.

2 Intended vehicle brand defection is on the rise in many markets around the world

The percentage of surveyed consumers intending to switch brands the next time they are in-market for a vehicle increased on a YoY basis across several markets, signaling the need to build strong customer relationships, particularly in developing markets with a significant percentage of first-time buyers (e.g., China).

3 Autonomous vehicles are coming back into view, but consumer concerns remain

An evolving view of the regulatory environment governing the development of autonomous technology in some global markets may ease the deployment of self-driving vehicle fleets for both consumer and commercial applications, but more than half of surveyed consumers in India, the UK and US remain concerned about their safety. Having said that, the integration of artificial intelligence (AI) into vehicle systems to enable self-driving features is seen as largely beneficial, particularly in Asia-Pacific markets.

4 A relatively high frequency of vehicle use persists in many markets, but many younger consumers surveyed are interested in mobility-as-a-service (MaaS) over ownership

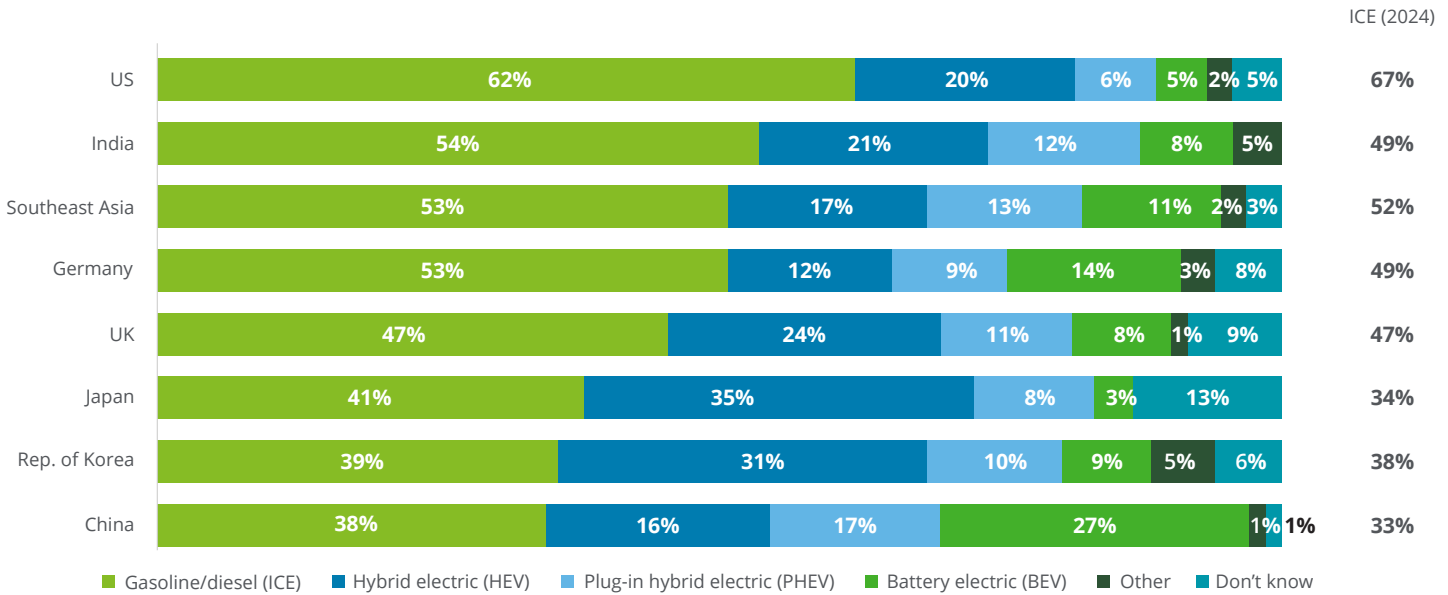
Half of surveyed consumers in India, Southeast Asia, and the US drive their vehicle every day (roughly twice the number of consumers in South Korea or Japan). However, a significant number of 18-34-year-olds surveyed in those markets (among others) are at least somewhat interested in giving up traditional vehicle ownership in favor of a MaaS solution.

1 Vehicle electrification



Respondents in some global markets continue to steer away from all-battery electric vehicles in favor of ICE and hybrids, which could be due, in part, to lingering affordability concerns.

Preference for type of engine in next vehicle



Note: Other includes vehicles with engine types such as compressed natural gas, ethanol, and hydrogen fuel cells; percentages may not add up to 100 due to rounding.

Q41. What type of engine would you prefer in your next vehicle?

Sample size: n = 939 [China]; 1,306 [Germany]; 882 [India]; 637 [Japan]; 906 [Republic of Korea]; 5,028 [Southeast Asia]; 1,314 [UK]; 937 [US]

Some reasons surveyed consumers intend to acquire an electrified vehicle include a desire to lower fuel costs, concern for the environment, and the driving experience (e.g., quieter, better performance).

Top reasons to choose an EV as next vehicle

| Factors | China | Germany | India | Japan | Rep. of Korea | South-east Asia | UK | US |
|--|-------|---------|-------|-------|---------------|-----------------|-----|-----|
| Concern for the environment | 43% | 54% | 63% | 42% | 43% | 55% | 51% | 44% |
| Concern about personal health | 31% | 18% | 44% | 12% | 16% | 39% | 21% | 20% |
| Lower fuel costs | 41% | 52% | 56% | 61% | 57% | 64% | 59% | 56% |
| Less maintenance | 29% | 29% | 45% | 18% | 38% | 42% | 24% | 30% |
| Ability to use the vehicle as a backup battery/power source | 36% | 22% | 48% | 28% | 17% | 40% | 18% | 25% |
| Peer pressure | 8% | 5% | 10% | 5% | 6% | 9% | 4% | 3% |
| Driving experience | 53% | 32% | 50% | 34% | 33% | 51% | 36% | 36% |
| Government incentives/subsidies/stimulus programs | 40% | 33% | 45% | 33% | 35% | 39% | 23% | 27% |
| Potential for extra taxes/levies applied to internal combustion vehicles | 27% | 19% | 31% | 12% | 20% | 26% | 19% | 18% |
| Potential ban on sale of new internal combustion vehicles | 18% | 22% | 30% | 8% | 12% | 18% | 28% | 17% |

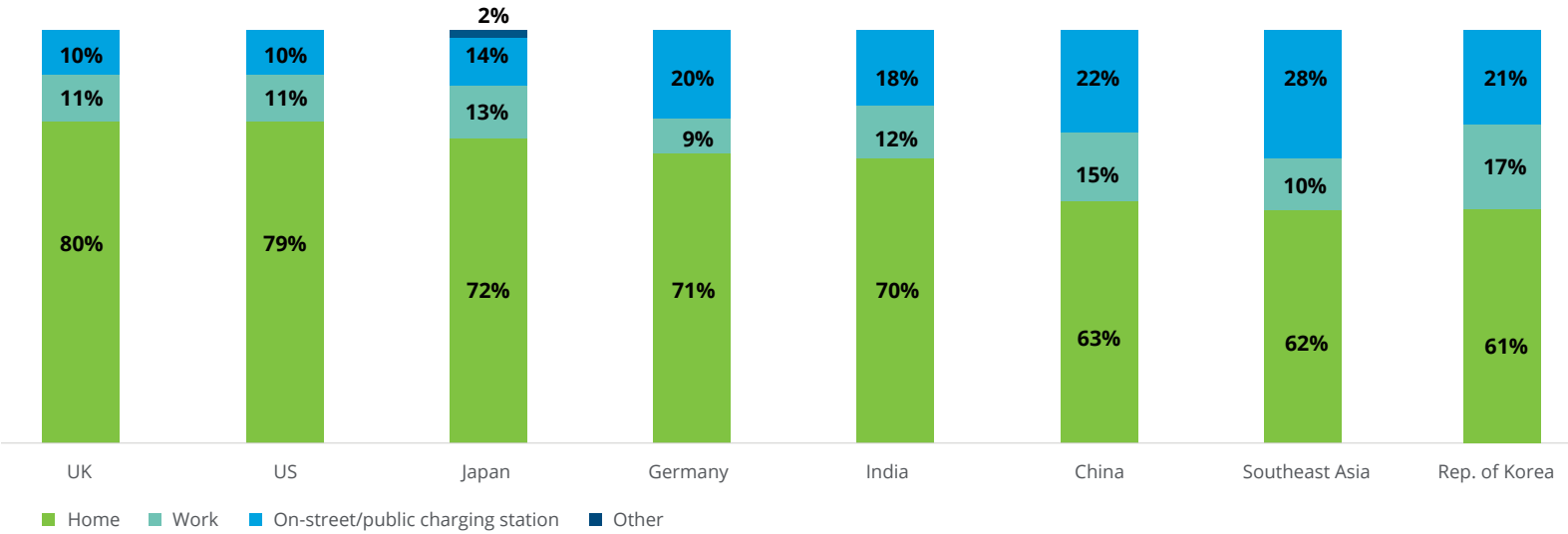
■ Top reasons

Q42. Which of the following factors have had the greatest impact on your decision to acquire an EV? Please select all that apply.

Sample size: n = 567 [China]; 466 [Germany]; 364 [India]; 285 [Japan]; 448 [Republic of Korea]; 2,097 [Southeast Asia]; 563 [UK]; 297 [US]

The push to create public charging capacity may be somewhat overstated in many markets as a strong majority of EV intenders surveyed plan to charge their vehicle at home.

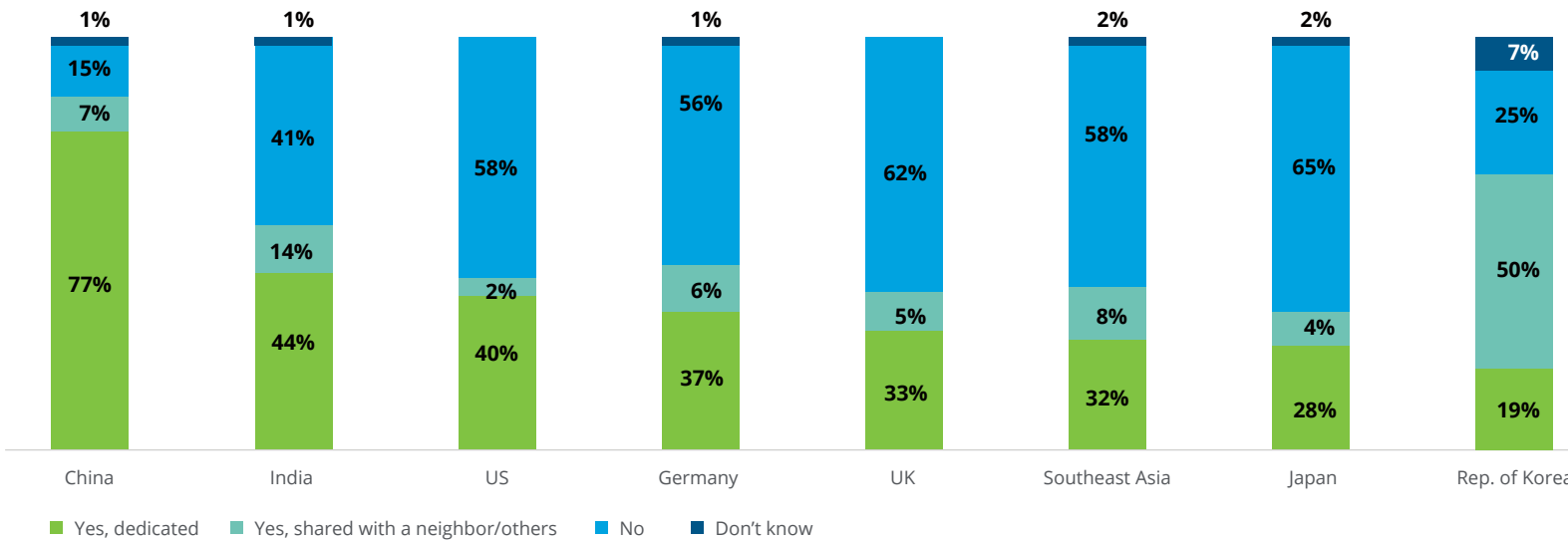
Expecting to charge electrified vehicle most often at...



Note: Percentages may not add up to 100 due to rounding.
 Q43. Where do you expect to charge your EV most often?
 Sample size: n = 413 [China]; 304 [Germany]; 182 [India]; 64 [Japan]; 166 [Republic of Korea]; 1,223 [Southeast Asia]; 245 [UK]; 111 [US]

Yet, many EV intenders surveyed in mature markets that plan to charge at home do not currently have access to a charger.

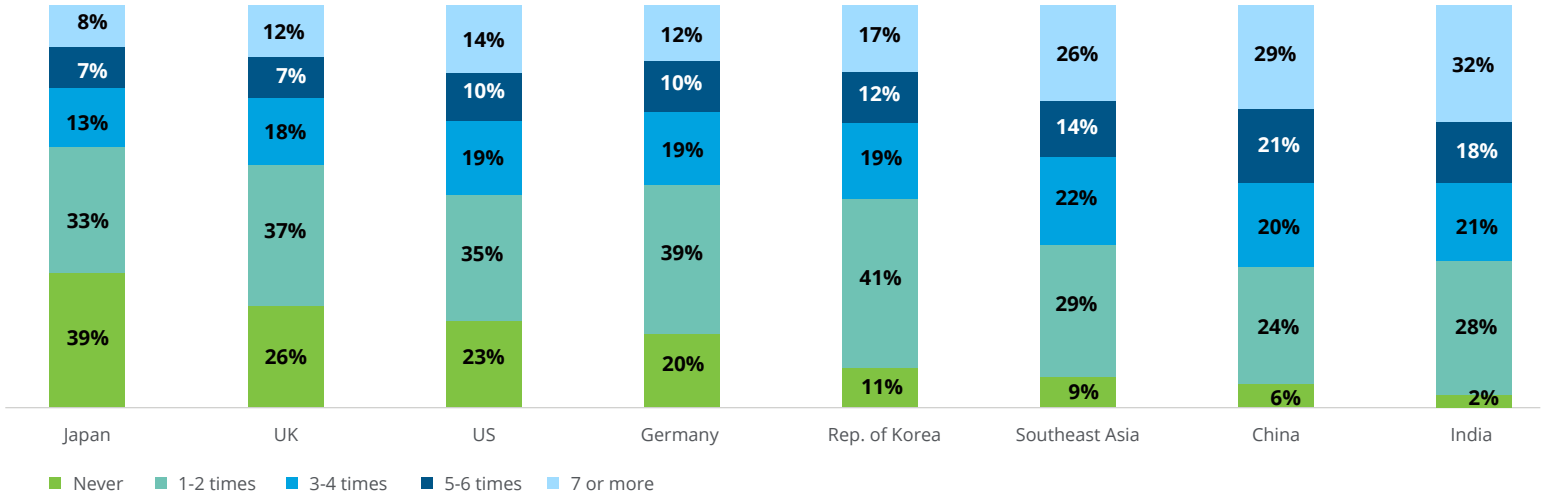
EV charger access among consumers who plan to charge their vehicle at home



Note: Percentages may not add up to 100 due to rounding.
 Q44. Do you already have access to a charger at your residence?
 Sample size: n = 260 [China]; 215 [Germany]; 128 [India]; 46 [Japan]; 102 [Republic of Korea]; 755 [Southeast Asia]; 195 [UK]; 88 [US]

The need for public EV charging investment may also be more concentrated in some Asia-Pacific markets (e.g., Southeast Asia, China, India) as survey respondents tend to drive farther than 60 miles / 100 km from their home more frequently than those in more mature markets (e.g., Japan, UK, US).

How often did consumers drive more than 60 miles/100 km from their home last month?



Note: Percentages may not add up to 100 due to rounding.

Q18: How many times in the past month have you driven more than 60 miles or 100 kilometers from your home?

Sample size: n= 852 [China]; 1,114 [Germany]; 646 [India]; 452 [Japan]; 618 [Republic of Korea]; 3,488 [Southeast Asia]; 1,043 [UK]; 821 [US]

Consumers surveyed in most global markets would prefer to charge their EV at a dedicated charging facility, perhaps reflecting a perception that these locations may offer more access to chargers with up-to-date technology.

Preference for public EV charging location

| Public places | China | Germany | India | Japan | Rep. of Korea | South-east Asia | UK | US |
|--|-------|---------|-------|-------|---------------|-----------------|-----|-----|
| Dedicated EV charging station | 42% | 32% | 49% | 30% | 33% | 33% | 43% | 44% |
| Traditional gas station with EV chargers | 10% | 21% | 23% | 22% | 17% | 34% | 15% | 15% |
| Vehicle dealership | 7% | 2% | 6% | 6% | 4% | 3% | 4% | 8% |
| Retail outlet/mall | 5% | 12% | 2% | 14% | 5% | 10% | 10% | 5% |
| Parking lot | 18% | 6% | 12% | 19% | 26% | 12% | 12% | 13% |
| On-street parking | 8% | 17% | 3% | 2% | 5% | 4% | 7% | 4% |
| Community/public building | 8% | 5% | 3% | 8% | 10% | 4% | 4% | 5% |
| Hotel | 3% | 3% | 3% | 0% | 1% | 1% | 4% | 5% |

■ Most preferred location

Note: Percentages may not add up to 100 due to rounding.

Q48: Where would you most want to charge your EV when you are away from home?

Sample size: n= 413 [China]; 304 [Germany]; 182 [India]; 64 [Japan]; 166 [Republic of Korea]; 1,223 [Southeast Asia]; 245 [UK]; 111 [US]

Overall, surveyed consumers across global markets agreed that the most important aspect of an EV charging experience is a fast charging time, eclipsing other factors including accessibility, amenities, security, and even the number of available/functional plugs.

Most important aspect of an EV charging experience

| Aspects of the EV charging experience | China | Germany | India | Japan | Rep. of Korea | South-east Asia | UK | US |
|--|------------|------------|------------|------------|---------------|-----------------|------------|------------|
| Availability of amenities (e.g., restrooms, WiFi connectivity, lounge/siting area) | 12% | 4% | 7% | 5% | 4% | 8% | 6% | 9% |
| Accessibility of the charging station | 8% | 11% | 24% | 9% | 26% | 15% | 10% | 14% |
| Fast charging time | 31% | 30% | 36% | 34% | 29% | 32% | 37% | 29% |
| Personal security (e.g., cameras, well-lit location, emergency assistance) | 8% | 8% | 6% | 8% | 2% | 9% | 8% | 10% |
| Number of available/functional chargers | 12% | 13% | 9% | 16% | 5% | 9% | 11% | 7% |
| Having a standard plug (no adapter needed) | 7% | 7% | 4% | 8% | 5% | 5% | 4% | 6% |
| Ease of use | 9% | 10% | 6% | 3% | 8% | 6% | 12% | 13% |
| Easy payment options | 3% | 8% | 1% | 3% | 3% | 3% | 3% | 5% |
| Location is easy to find/access | 12% | 10% | 7% | 14% | 18% | 14% | 9% | 8% |

■ Most important

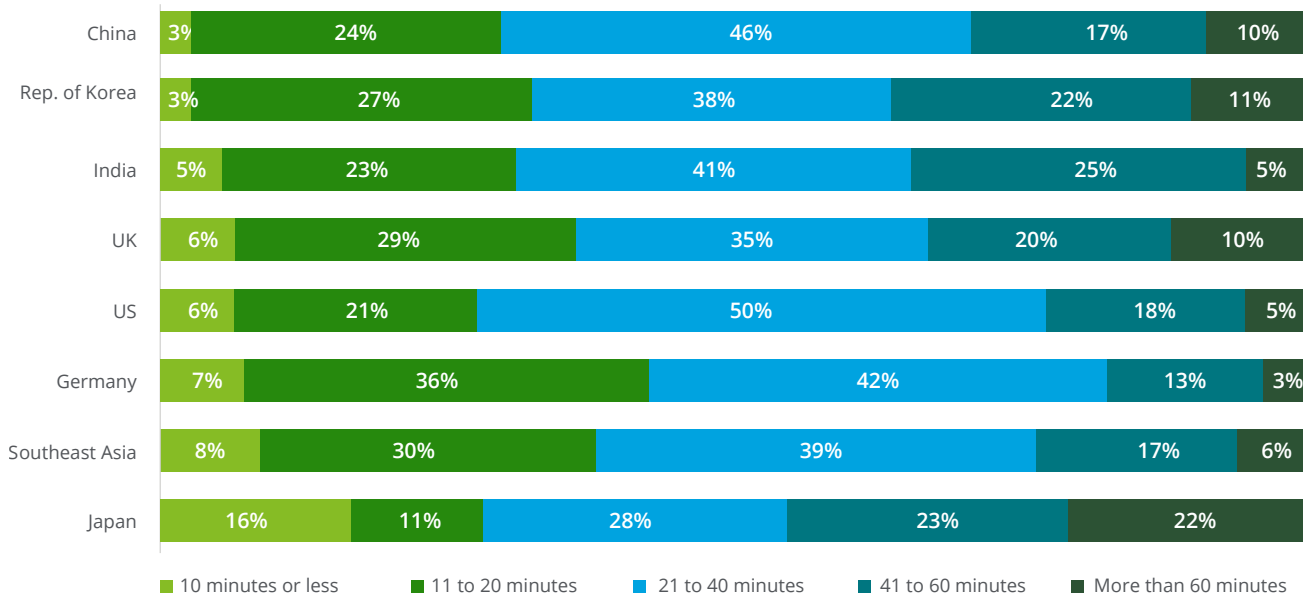
Note: Percentages may not add up to 100 due to rounding.

Q50: What is the most important aspect of an EV charging experience?

Sample size: n= 413 [China]; 304 [Germany]; 182 [India]; 64 [Japan]; 166 [Republic of Korea]; 1,223 [Southeast Asia]; 245 [UK]; 111 [US]

However, a long-standing industry assumption that EV charge times need to be on par with fossil fuel fill-ups may be overstated as surveyed consumers in most markets are willing to wait up to 40 minutes.

Expected wait time to charge an EV at public charging stations from empty to 80%



Note: Percentages may not add up to 100 due to rounding.

Q49. How long do you think it should take to charge an EV from fully discharged to 80% at a public charging location?

Sample size: n = 413 [China]; 304 [Germany]; 182 [India]; 64 [Japan]; 166 [Republic of Korea]; 1,223 [Southeast Asia]; 245 [UK]; 111 [US]

When it comes to paying for public EV charging, surveyed consumers in most markets prefer the familiarity and convenience of using their credit/debit cards.

Most preferred way to pay for public EV charging

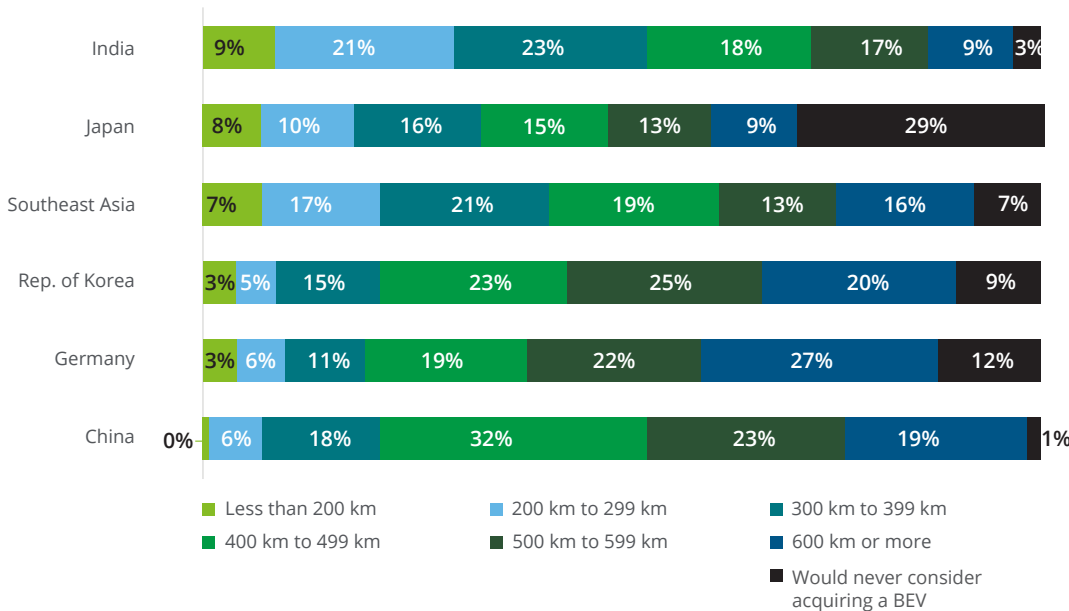
| Payment methods | China | Germany | India | Japan | Rep. of Korea | South-east Asia | UK | US |
|---|-------|---------|-------|-------|---------------|-----------------|-----|-----|
| Charging network app on your smartphone | 48% | 29% | 31% | 16% | 20% | 47% | 24% | 28% |
| Credit/debit card | 8% | 52% | 45% | 64% | 60% | 26% | 52% | 50% |
| Pre-paid subscription plan | 5% | 6% | 11% | 6% | 7% | 13% | 12% | 12% |
| Loyalty points | 10% | 4% | 5% | 5% | 8% | 5% | 8% | 6% |
| Third-party payment platform | 30% | 8% | 7% | 9% | 5% | 9% | 4% | 3% |

■ Most preferred mode of payment

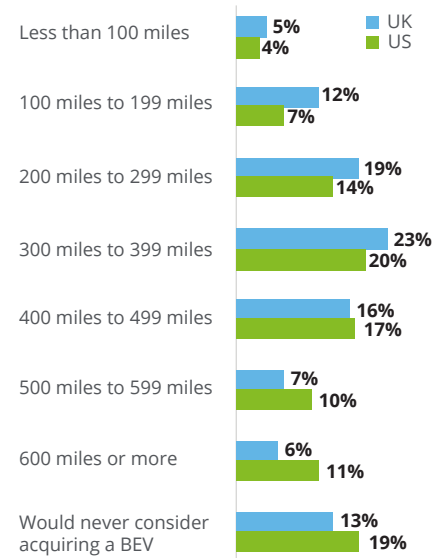
Note: Percentages may not add up to 100 due to rounding.
 Q51: How would you most prefer to pay for public EV charging?
 Sample size: n= 413 [China]; 304 [Germany]; 182 [India]; 64 [Japan]; 166 [Republic of Korea]; 1,223 [Southeast Asia]; 245 [UK]; 111 [US]

Expectations for BEV driving range vary significantly by global market surveyed. Nearly half of surveyed consumers in India (47%) expect more than 400 km, whereas 80% of consumers in Germany expect the same as a prerequisite to consider a BEV as a viable option.

Consumer expectations on BEV driving range (in kilometers)



Consumer expectations on BEV driving range in UK and US (in miles)



Note: Percentages may not add up to 100 due to rounding.
 Q53. How far would a fully charged all-battery EV need to go in order for you to consider acquiring one?
 Sample size: n = 685 [China]; 1,121 [Germany]; 809 [India]; 621 [Japan]; 827 [Republic of Korea]; 4,464 [Southeast Asia]; 1,208 [UK]; 886 [US]

When it comes to BEVs, surveyed consumers are generally most concerned about charging time, range anxiety, cost, lack of public charging infrastructure, and battery safety.

Greatest concern regarding all battery-powered electric vehicles (BEVs)

| Concern | China | Germany | India | Japan | Rep. of Korea | South-east Asia | UK | US |
|---|-------|---------|-------|-------|---------------|-----------------|-----|-----|
| Driving range | 38% | 54% | 35% | 40% | 26% | 43% | 52% | 49% |
| Cost/price premium | 22% | 45% | 32% | 40% | 24% | 37% | 49% | 44% |
| Cold weather performance | 37% | 37% | 32% | 25% | 38% | 26% | 31% | 39% |
| Increased need to plan my trips | 14% | 21% | 22% | 28% | 11% | 22% | 33% | 28% |
| Uncertain resale value | 14% | 27% | 21% | 18% | 12% | 23% | 24% | 19% |
| Potential for extra taxes/levies associated with BEVs | 16% | 10% | 22% | 11% | 12% | 19% | 18% | 17% |
| Time required to charge | 38% | 42% | 39% | 49% | 39% | 46% | 47% | 46% |
| Ongoing charging and running costs | 30% | 25% | 28% | 28% | 23% | 33% | 29% | 29% |
| Cost to eventually replace the battery | 35% | 40% | 31% | 39% | 27% | 38% | 43% | 39% |
| Lack of knowledge or understanding about EVs/ EV technology | 20% | 15% | 29% | 13% | 15% | 32% | 22% | 20% |
| Lack of public EV charging infrastructure | 24% | 43% | 38% | 37% | 33% | 41% | 44% | 41% |
| Lack of charger at home | 16% | 37% | 27% | 45% | 19% | 31% | 36% | 36% |
| Lack of alternate power source (e.g., solar) at home | 12% | 21% | 25% | 25% | 11% | 27% | 19% | 20% |
| Safety concerns with battery technology | 37% | 28% | 37% | 30% | 49% | 37% | 29% | 29% |
| End-to-end sustainability (i.e., battery manufacturing/recycling) | 24% | 22% | 30% | 11% | 10% | 23% | 21% | 20% |
| Lack of choice regarding brands/models | 11% | 11% | 20% | 8% | 8% | 13% | 13% | 11% |

■ Most commonly cited

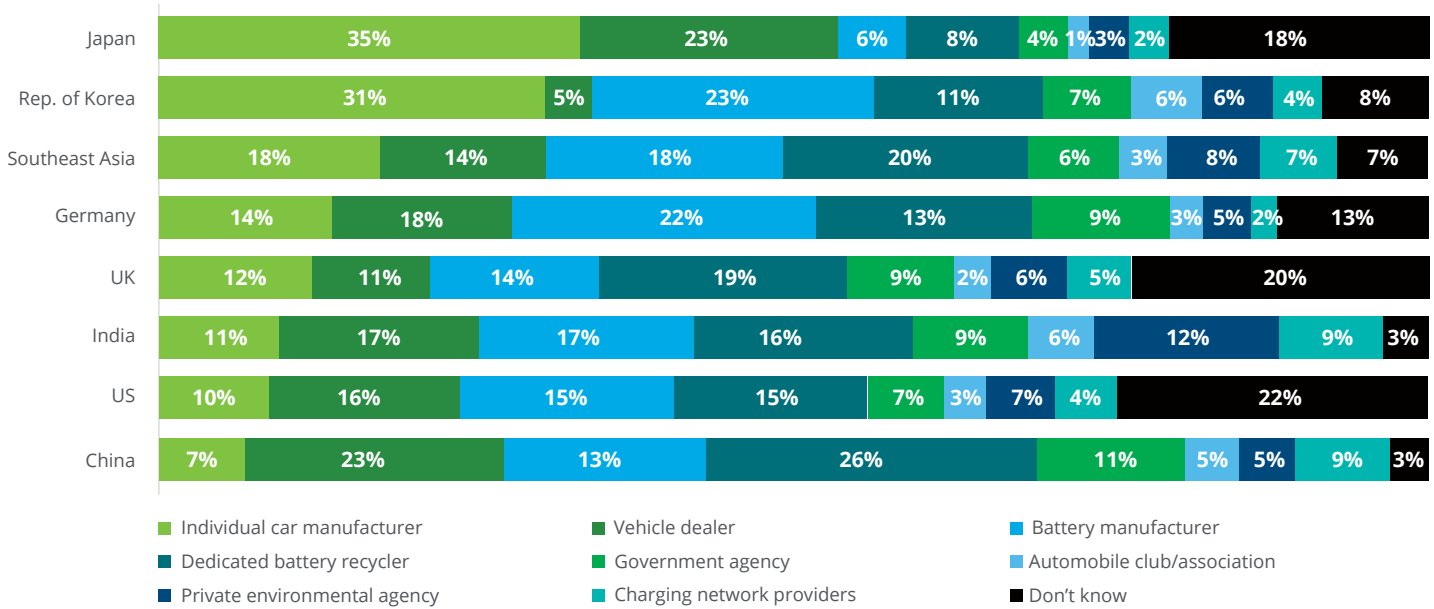
Note: Sum of the percentages exceed 100% as respondents can select multiple options.

Q52: What are your biggest concerns regarding all battery-powered EVs? Please select all that apply.

Sample size: n= 939 [China]; 1,306 [Germany]; 882 [India]; 637 [Japan]; 906 [Republic of Korea]; 5,028 [Southeast Asia]; 1,314 [UK]; 937 [US]

The global end-of-life EV battery value chain remains relatively nascent even as the number of EVs on the road continues to increase,¹ and surveyed consumers are split in terms of who they think should be responsible for battery stewardship.

Consumer preference for entity responsible for collecting, storing, and recycling EV batteries after their useful lives



1 IEA, Global EV Outlook 2024.

Note: Percentages may not add up to 100 due to rounding.

Q55. Who do you think should be responsible for collecting, storing, and recycling electric vehicle batteries after their useful lives?

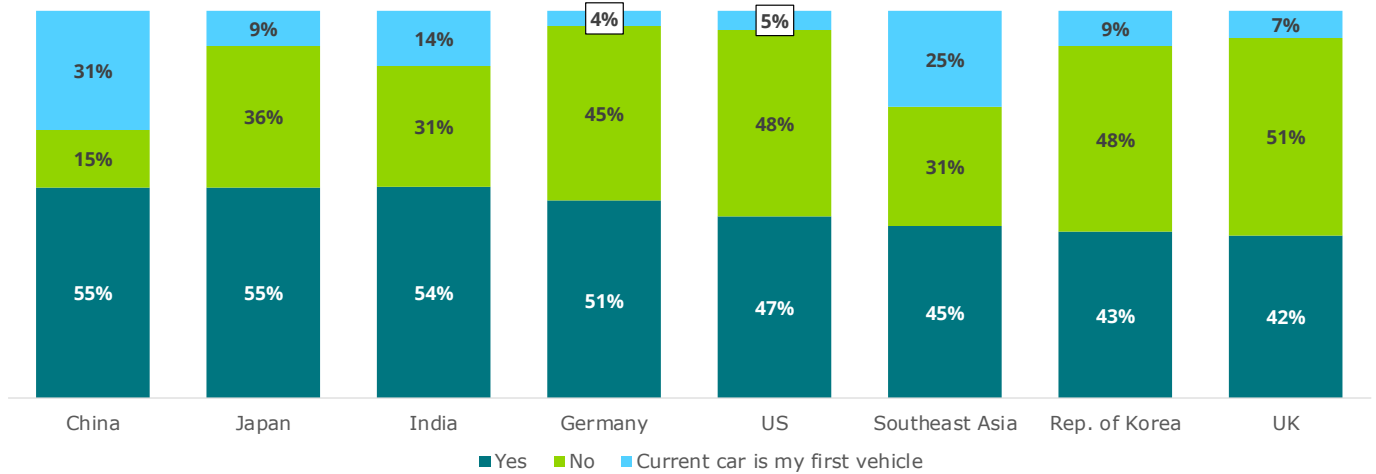
Sample size: n = 939 [China]; 1,306 [Germany]; 882 [India]; 637 [Japan]; 906 [Republic of Korea]; 5,027 [Southeast Asia]; 1,314 [UK]; 937 [US]

2 Future vehicle intentions



More than half of surveyed consumers in China owned the same brand of vehicle prior to their current car, but nearly a third of survey respondents say they are first-time owners, signaling a need to build strong customer relationships to help ensure forward brand loyalty.

Percentage of consumers whose prior vehicle was from the same brand as current vehicle

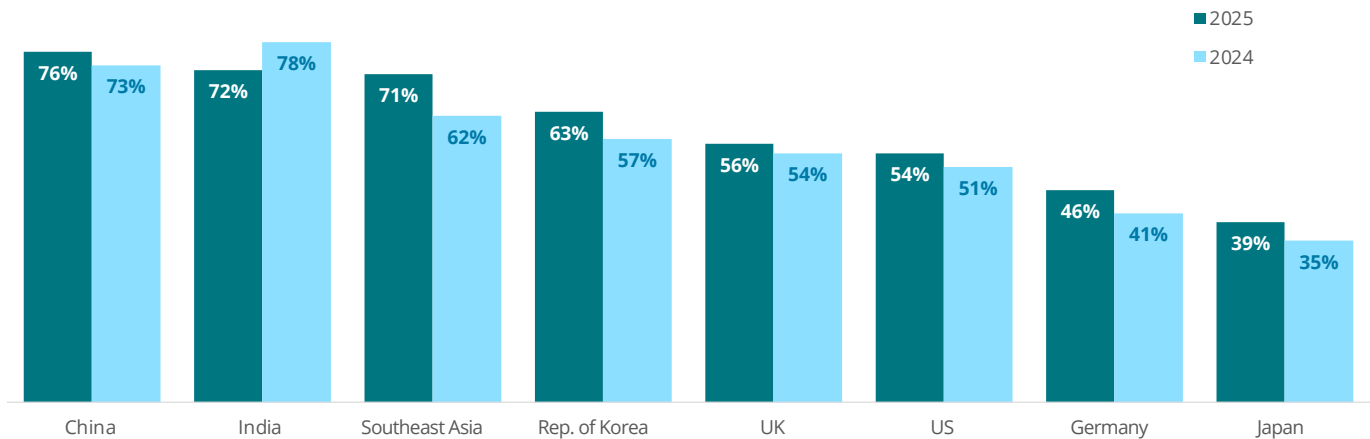


Q6. Was your prior vehicle from the same brand?

Sample size: n = 852 [China]; 1,114 [Germany]; 646 [India]; 452 [Japan]; 618 [Republic of Korea]; 3,488 [Southeast Asia]; 1,044 [UK]; 821 [US]

However, three quarters of surveyed consumers in China say they intend to switch to another brand of vehicle the next time they are in-market, signaling the intensity of the competitive landscape in China. Conversely, consumers surveyed in Japan are generally more brand loyal, but the intended defection rate is rising across many global markets on a year-over-year basis.

Percentage of consumers intending to switch to another brand* of vehicle



*Includes switching to a different brand from the same parent or a different brand from a different sales parent.

Q5. What brand is the vehicle you drive most often? Q26. What brand are you considering most for your next vehicle?

[Brand switching percentage is based on a calculation involving these two questions.]

Sample size: n = 830 [China]; 1,073 [Germany]; 633 [India]; 398 [Japan]; 589 [Republic of Korea]; 3,807 [Southeast Asia]; 959 [UK]; 786 [US]

Depending on the market, what matters most to surveyed consumers thinking about their next vehicle brand is either price, product quality, or performance.

Most important factors driving the choice of brand for next vehicle

| Drivers of brand choice | China | Germany | India | Japan | Rep. of Korea | South-east Asia | UK | US |
|--|-------|---------|-------|-------|---------------|-----------------|-----|-----|
| Previous sales experience | 13% | 28% | 16% | 7% | 7% | 14% | 13% | 15% |
| Previous service experience | 19% | 20% | 22% | 13% | 15% | 19% | 20% | 21% |
| Product quality | 50% | 53% | 62% | 45% | 51% | 65% | 62% | 58% |
| Brand advertising | 20% | 6% | 24% | 5% | 8% | 13% | 5% | 10% |
| Brand image | 38% | 16% | 46% | 18% | 25% | 36% | 18% | 17% |
| Brand affiliations (e.g., sponsorships, partners) | 16% | 5% | 23% | 5% | 6% | 11% | 5% | 8% |
| Brand familiarity | 34% | 41% | 43% | 21% | 20% | 32% | 30% | 32% |
| Quality of overall ownership experience | 31% | 34% | 43% | 6% | 25% | 38% | 34% | 39% |
| Vehicle features | 35% | 44% | 55% | 55% | 29% | 53% | 49% | 48% |
| Availability of battery electric vehicles/hybrid options | 31% | 14% | 37% | 19% | 23% | 25% | 18% | 17% |
| Vehicle performance (e.g., fuel efficiency, battery range) | 47% | 38% | 59% | 52% | 59% | 59% | 57% | 51% |
| Price | 25% | 62% | 43% | 56% | 45% | 54% | 62% | 53% |

■ Most commonly cited

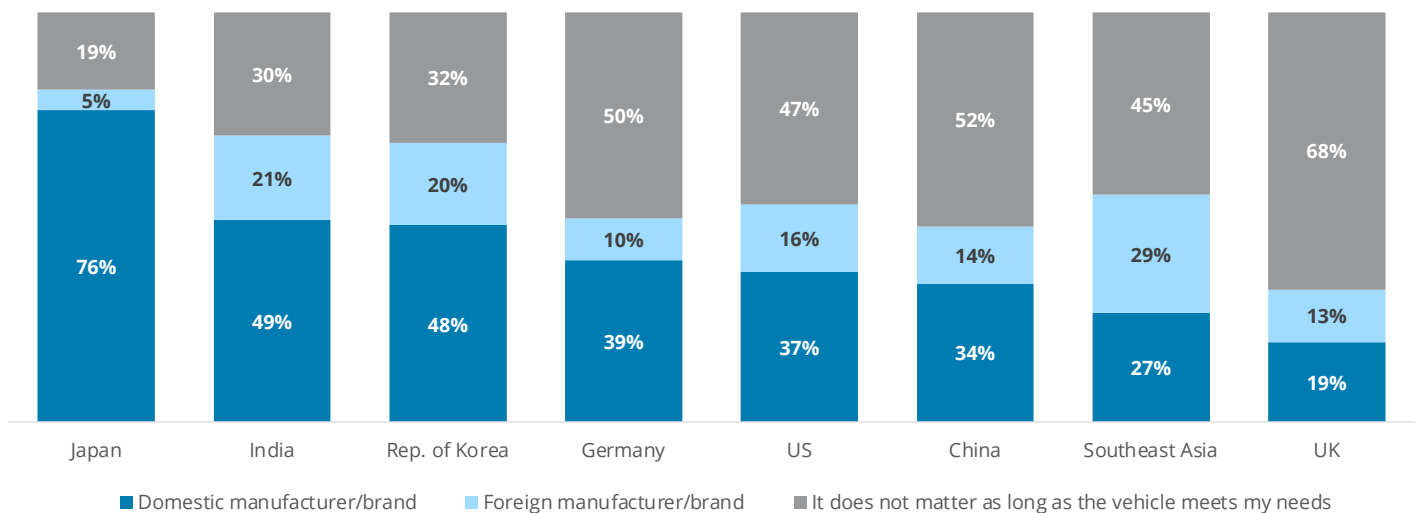
Note: Sum of the percentages exceed 100% as respondents can select multiple options.

Q29. What are the most important factors driving the choice of brand for your next vehicle? Please select all that apply.

Sample size: n = 939 [China]; 1,306 [Germany]; 882 [India]; 637 [Japan]; 906 [Republic of Korea]; 5,028 [Southeast Asia]; 1,315 [UK]; 937 [US]

Brand affinity for domestic automakers is strongest among consumers surveyed in Japan while it is least prevalent in Southeast Asia and the United Kingdom, underscoring the complexity and diversity of the competitive landscape across global markets.

Preferred organizations for next vehicle purchase



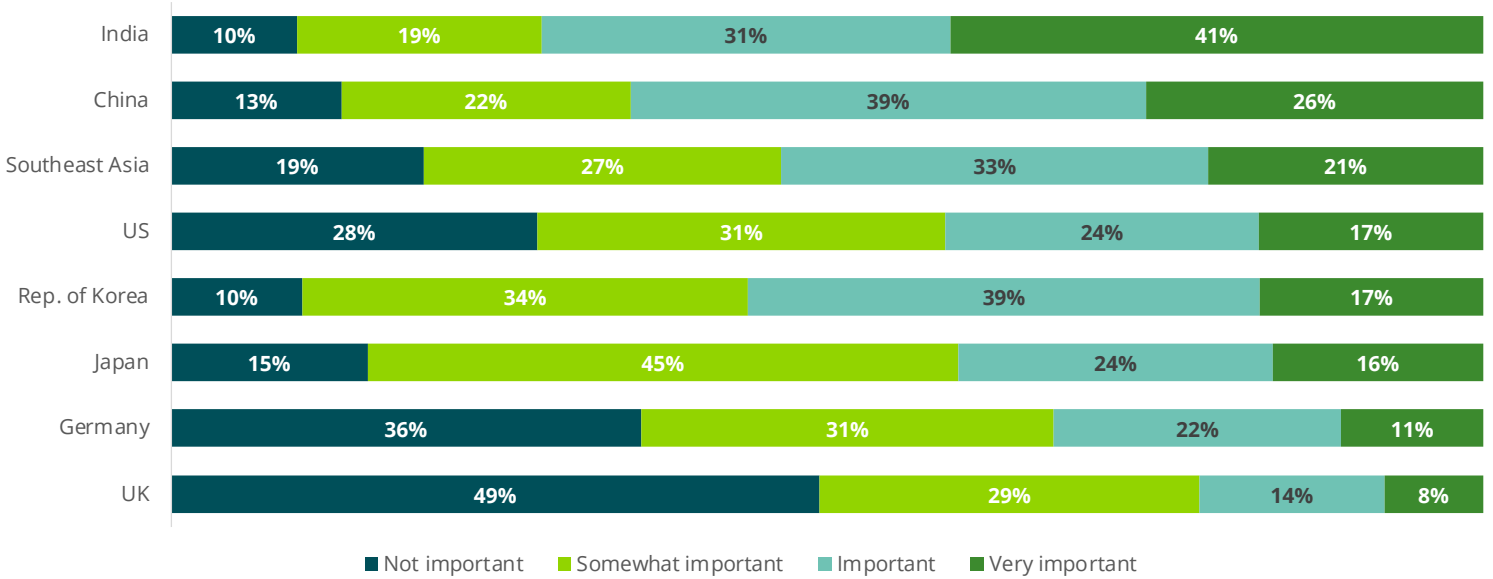
Note: Percentages may not add to 100 due to rounding.

Q54. From which of the following types of organizations are you most interested in acquiring your next vehicle?

Sample size: n = 939 [China]; 1,306 [Germany]; 882 [India]; 637 [Japan]; 906 [Republic of Korea]; 5,028 [Southeast Asia]; 1,314 [UK]; 937 [US]

As global trade policies shift, encouraging a more regional approach to vehicle manufacturing footprints and supply chains, consumer sentiment differs among respondents when it comes to whether local manufacturing is an important criteria for choosing a vehicle.

Importance of next vehicle to be manufactured locally



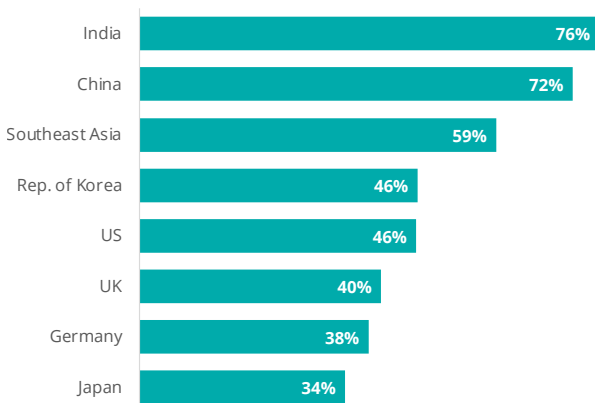
Note: Percentages may not add up to 100 due to rounding.

Q31. To what extent is it important that your next vehicle be locally manufactured (i.e., manufactured in your country or region)?

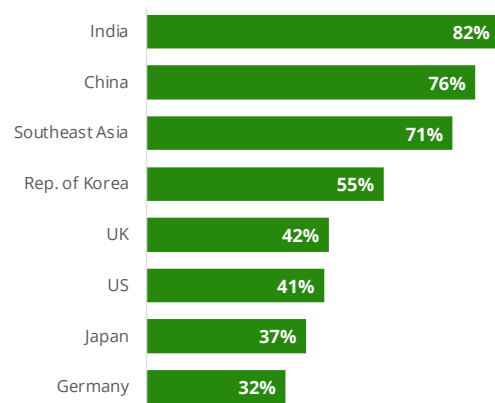
Sample size: n = 939 [China]; 1,306 [Germany]; 882 [India]; 637 [Japan]; 906 [Republic of Korea]; 5,028 [Southeast Asia]; 1,315 [UK]; 937 [US]

As some original equipment manufacturers (OEMs) continue to explore the potential for ‘agency’ retail models, surveyed consumers in India and China are more receptive to the concept of buying a vehicle directly from the manufacturer compared to consumers in Japan. Also, surveyed consumers in some markets are signaling a high level of interest in purchasing vehicle insurance directly from the manufacturer.

Percentage of surveyed consumers who would be interested in acquiring vehicle directly from the manufacturer



Percentage of surveyed consumers who would be interested in purchasing insurance directly from the manufacturer



Q61. To what extent are you interested in acquiring your next vehicle directly from the manufacturer (via an online process)?

Q60. The next time you acquire a vehicle, how interested would you be in purchasing insurance directly from the vehicle manufacturer?

Sample size: n = 939 [China]; 1,306 [Germany]; 882 [India]; 637 [Japan]; 906 [Republic of Korea]; 5,028 [Southeast Asia]; 1,314 [UK]; 937 [US]

However, it may be difficult to move to an entirely online purchase process in many markets as surveyed consumers say they need to physically interact with the vehicle before they buy it.

Level of agreement on various aspects of the purchase experience (% somewhat/strongly agree)

| Aspect of vehicle purchase experience | China | Germany | India | Japan | Rep. of Korea | South-east Asia | UK | US |
|---|------------|------------|------------|------------|---------------|-----------------|------------|------------|
| I want to interact with real people | 85% | 81% | 90% | 73% | 67% | 88% | 83% | 80% |
| I want to negotiate in-person to get the best deal | 85% | 74% | 89% | 75% | 73% | 89% | 80% | 76% |
| I need to physically interact with the vehicle before I buy it | 88% | 80% | 92% | 81% | 70% | 91% | 84% | 86% |
| I have to test drive the vehicle to make sure it's right for me | 86% | 80% | 92% | 72% | 74% | 90% | 84% | 86% |
| I prefer to limit the need to visit a dealership in person | 41% | 33% | 73% | 23% | 36% | 55% | 35% | 49% |
| I want to build a relationship with a dealer for future service | 85% | 57% | 89% | 64% | 59% | 80% | 57% | 63% |

Q40. Thinking about the next time you acquire a vehicle, to what extent do you agree or disagree with the following statements?

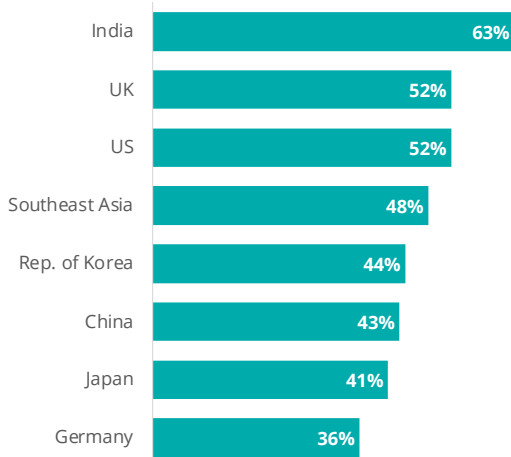
Sample size: n = 939 [China]; 1,306 [Germany]; 882 [India]; 637 [Japan]; 906 [Republic of Korea]; 5,027 [Southeast Asia]; 1,314 [UK]; 937 [US]

3 Connectivity

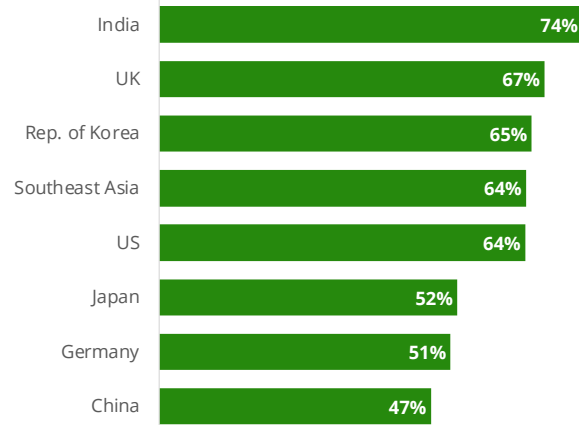


Consumers surveyed in both India and the United Kingdom are more concerned with the idea of an autonomous vehicle fleet when compared to surveyed consumers in Germany, Japan, or China.

Percentage of consumers concerned about **fully autonomous robotaxi services** operating where they live



Percentage of consumers concerned about **commercial vehicles operating in a fully autonomous mode** on the highway

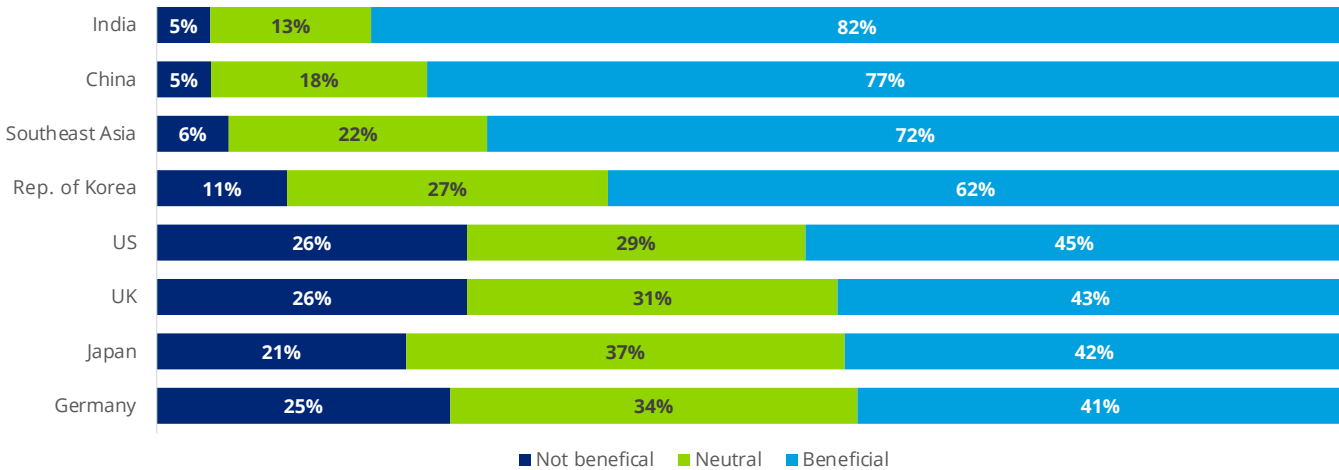


Q56. To what extent are you concerned with each of the following scenarios?

Sample size: n = 939 [China]; 1,306 [Germany]; 882 [India]; 637 [Japan]; 906 [Republic of Korea]; 5,028 [Southeast Asia]; 1,314 [UK]; 937 [US]

More than three quarters of surveyed consumers in India and China believe the addition of artificial intelligence in vehicle systems is beneficial. On the other hand, a quarter of surveyed consumers in Germany, the United States, and the United Kingdom remain skeptical about the technology.

Addition of artificial intelligence in vehicle systems



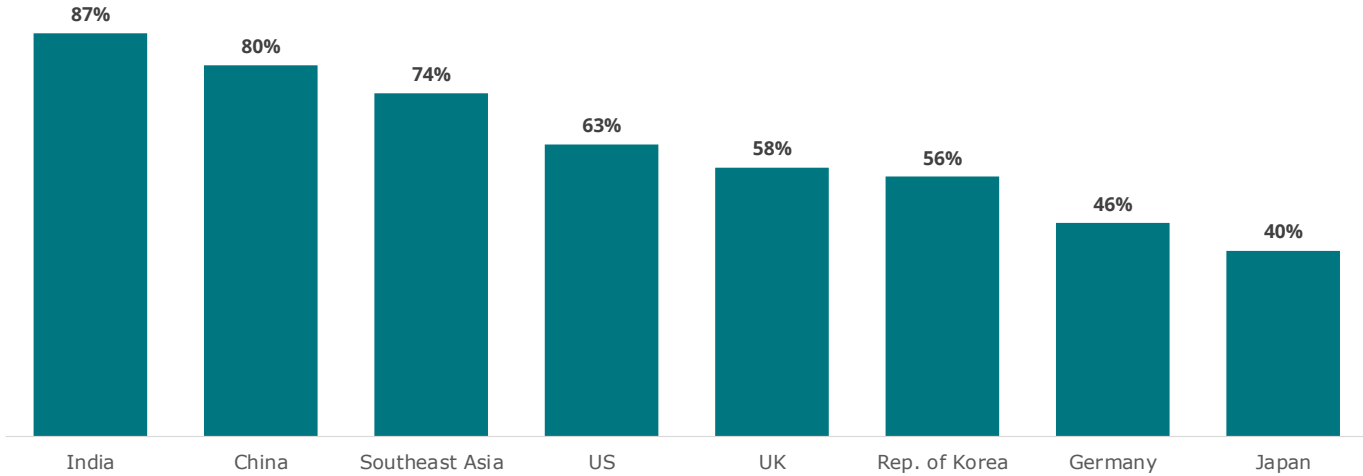
Note: Percentages may not add up to 100 due to rounding.

Q62. To what extent do you think the addition of artificial intelligence in vehicle systems (e.g., voice activated features, autonomous driving) will be beneficial?

Sample size: n = 939 [China]; 1,306 [Germany]; 882 [India]; 637 [Japan]; 906 [Republic of Korea]; 5,028 [Southeast Asia]; 1,314 [UK]; 937 [US]

At a time when some car manufacturers are attempting to introduce their own connected service ecosystems, surveyed consumers in some global markets still believe their next vehicle should retain the ability to connect with their smartphone.

Importance of vehicle connectivity with smartphone (% somewhat/very important)



Q58. How important will it be for your next vehicle to connect with your smartphone via Apple CarPlay or Android Auto?
 Sample size: n = 939 [China]; 1,306 [Germany]; 882 [India]; 637 [Japan]; 906 [Republic of Korea]; 5,028 [Southeast Asia]; 1,314 [UK]; 937 [US]

Though it could mean sharing personally identifiable information (PII) with manufacturers or other third parties, a greater percentage of surveyed consumers in developing markets are interested in connected vehicle features.

Willingness (% somewhat willing/very willing) to pay extra for connected vehicle services

| Connected vehicle services | China | Germany | India | Japan | Rep. of Korea | South-east Asia | UK | US |
|---|-------|---------|-------|-------|---------------|-----------------|-----|-----|
| Automatic detection of vehicles and pedestrians | 75% | 47% | 81% | 49% | 71% | 73% | 50% | 60% |
| Emergency assistance (e.g., collision detection) | 78% | 48% | 86% | 50% | 71% | 82% | 58% | 62% |
| Anti-theft tracking | 77% | 50% | 88% | 49% | 66% | 82% | 65% | 60% |
| Warranty/recall notices | 70% | 37% | 83% | 31% | 60% | 69% | 46% | 51% |
| App connectivity | 68% | 30% | 81% | 23% | 51% | 69% | 39% | 47% |
| Autonomous/remote parking | 70% | 30% | 78% | 32% | 54% | 64% | 38% | 37% |
| Infotainment functions (e.g., navigation, video streaming) | 65% | 38% | 79% | 35% | 56% | 63% | 44% | 49% |
| Vehicle health reporting and maintenance cost forecasts | 73% | 34% | 83% | 29% | 57% | 73% | 49% | 48% |
| Optimized vehicle insurance plan based on your driving habits | 73% | 34% | 83% | 36% | 53% | 71% | 47% | 52% |
| Digital key | 67% | 31% | 80% | 32% | 56% | 66% | 36% | 45% |

■ Most commonly cited

Q57. To what extent would you be willing to pay extra for each of the following connected vehicle services?
 Sample size: n = 939 [China]; 1,306 [Germany]; 882 [India]; 637 [Japan]; 906 [Republic of Korea]; 5,028 [Southeast Asia]; 1,314 [UK]; 937 [US]

In most markets surveyed, consumers trust car manufacturers the most when it comes to managing connected vehicle data. At the same time, a majority of consumers surveyed in Germany, the United Kingdom, and the United States do not trust any of the listed entities, which could represent a challenge for companies looking to monetize connected services.

Most trusted entity for managing vehicle data

| Most trusted entity | China | Germany | India | Japan | Rep. of Korea | South-east Asia | UK | US |
|--------------------------------|-------|---------|-------|-------|---------------|-----------------|-----|-----|
| Car manufacturer | 25% | 22% | 28% | 30% | 40% | 30% | 23% | 19% |
| Vehicle dealer | 17% | 17% | 16% | 30% | 6% | 17% | 13% | 16% |
| Financial service provider | 7% | 4% | 11% | 1% | 5% | 4% | 4% | 3% |
| Insurance company | 7% | 7% | 10% | 12% | 4% | 12% | 10% | 9% |
| Automobile club or association | 6% | 7% | 5% | 1% | 4% | 3% | 4% | 4% |
| Cellular service provider | 6% | 4% | 7% | 3% | 12% | 6% | 4% | 8% |
| Cloud service provider | 8% | 3% | 8% | 3% | 9% | 7% | 6% | 6% |
| Government agency | 20% | 10% | 12% | 3% | 12% | 11% | 7% | 4% |
| None of the above | 4% | 26% | 3% | 17% | 9% | 11% | 30% | 31% |

■ Most commonly cited

Note: Percentages may not add up to 100 due to rounding.

Q59. Who do you trust most to access and manage the data your vehicle generates?

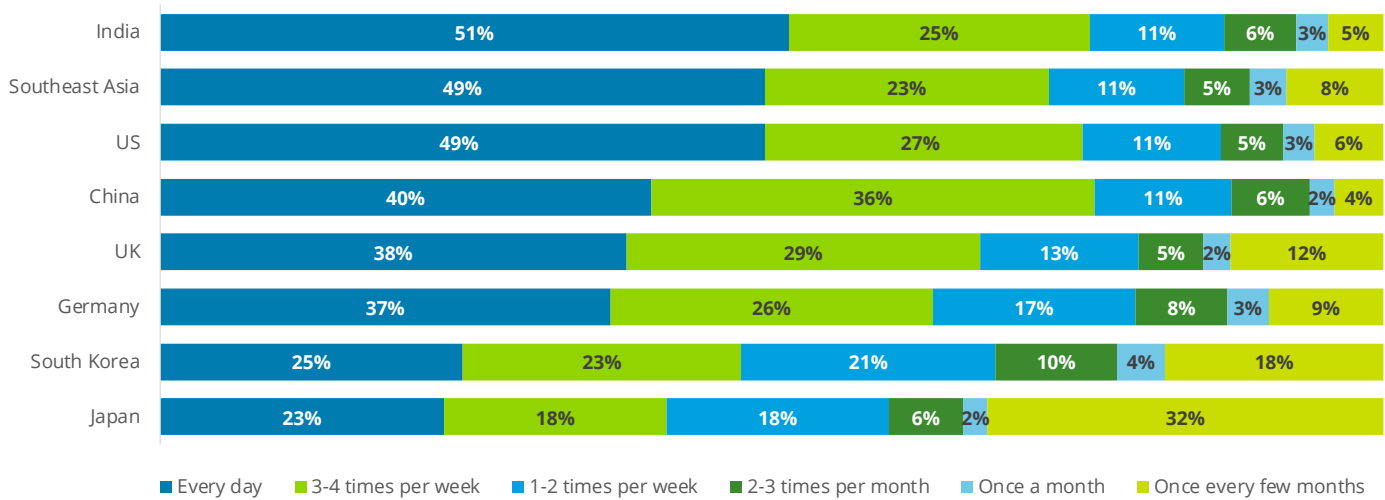
Sample size: n = 939 [China]; 1,306 [Germany]; 882 [India]; 637 [Japan]; 906 [Republic of Korea]; 5,028 [Southeast Asia]; 1,314 [UK]; 937 [US]

4 Mobility-as-a-Service (MaaS)



Half of surveyed consumers in India, Southeast Asia, and the United States say they drive their vehicle every day—roughly twice the number of consumers in Japan and South Korea who say the same, perhaps reflecting a difference in the quality and/or availability of mass transit across markets.

Frequency of driving personal vehicle



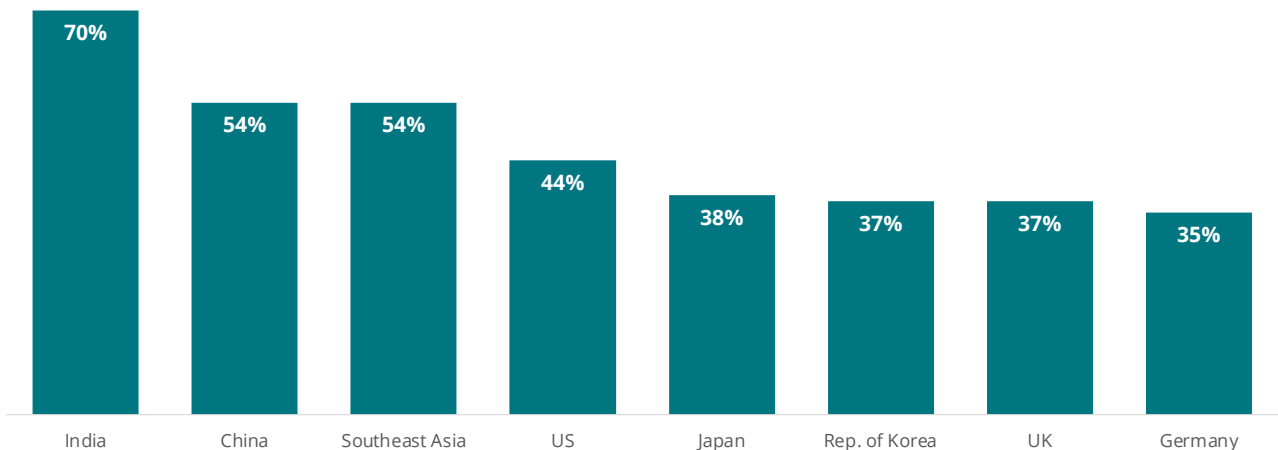
Note: Percentages may not add up to 100 due to rounding.

Q70. How often do you drive your current vehicle?

Sample size: n = 1,001 [China]; 1,507 [Germany]; 1,000 [India]; 1,000 [Japan]; 1,012 [Republic of Korea]; 6,029 [Southeast Asia]; 1,505 [UK]; 1,002 [US]

Even though surveyed consumers in India drive a lot, many younger consumers there would be willing to give up vehicle ownership in favor of a MaaS solution. In contrast, only 1 in 3 younger consumers in Germany would be willing to do the same.

Willingness to give up vehicle ownership in favor of MaaS (% somewhat willing/willing/very willing) - 18- to 34-year-old respondents



Q63. To what extent would you be willing to give up vehicle ownership in favor of a fully available mobility-as-a-service (MaaS) solution going forward?

Sample size: n = 261 [China]; 344 [Germany]; 404 [India]; 191 [Japan]; 246 [Republic of Korea]; 2,116 [Southeast Asia]; 392 [UK]; 286 [US]

Consumers surveyed across global markets currently use a combination of personal vehicles and MaaS solutions to satisfy their transportation requirements.

Percentage of mobility needs currently addressed by private vehicle vs. MaaS

| Mix of transportation type | China | Germany | India | Japan | Rep. of Korea | South-east Asia | UK | US |
|--------------------------------|-------|---------|-------|-------|---------------|-----------------|-----|-----|
| 100% Private vehicle – 0% MaaS | 10% | 40% | 13% | 35% | 17% | 22% | 43% | 50% |
| 90% Private vehicle – 10% MaaS | 14% | 8% | 10% | 8% | 10% | 12% | 8% | 6% |
| 80% Private vehicle - 20% MaaS | 16% | 9% | 15% | 9% | 11% | 14% | 6% | 5% |
| 70% Private vehicle - 30% MaaS | 20% | 6% | 13% | 6% | 12% | 12% | 5% | 6% |
| 60% Private vehicle - 40% MaaS | 13% | 5% | 13% | 5% | 8% | 8% | 5% | 5% |
| 50% Private vehicle - 50% MaaS | 10% | 10% | 18% | 11% | 12% | 15% | 9% | 9% |
| 40% Private vehicle - 60% MaaS | 7% | 4% | 7% | 2% | 5% | 4% | 4% | 4% |
| 30% Private vehicle - 70% MaaS | 5% | 2% | 4% | 2% | 5% | 3% | 2% | 3% |
| 20% Private vehicle - 80% MaaS | 3% | 2% | 3% | 2% | 4% | 2% | 2% | 2% |
| 10% Private vehicle - 90% MaaS | 2% | 2% | 2% | 2% | 3% | 2% | 2% | 2% |
| 0% Private vehicle - 100% MaaS | 1% | 11% | 3% | 19% | 11% | 6% | 13% | 7% |

Note: Percentages may not add up to 100 due to rounding.

Q64. Currently, what percentage of your overall mobility needs are being addressed by the following types of transportation?

Sample size: n = 1,001 [China]; 1,507 [Germany]; 1,000 [India]; 1,000 [Japan]; 1,012 [Republic of Korea]; 6,029 [Southeast Asia]; 1,505 [UK]; 1,002 [US]

Consumers surveyed across global markets expect their use of personal vehicles to decline somewhat in favor of MaaS solutions in five years.

Consumer preference for percentage of mobility needs by type in five years (private vehicle vs. mobility-as-a-service)

| Mix of transportation type | China | Germany | India | Japan | Rep. of Korea | South-east Asia | UK | US |
|--------------------------------|-------|---------|-------|-------|---------------|-----------------|-----|-----|
| 100% Private vehicle – 0% MaaS | 9% | 35% | 11% | 28% | 12% | 17% | 36% | 42% |
| 90% Private vehicle – 10% MaaS | 10% | 7% | 12% | 7% | 9% | 11% | 6% | 6% |
| 80% Private vehicle - 20% MaaS | 16% | 10% | 16% | 8% | 11% | 12% | 8% | 8% |
| 70% Private vehicle - 30% MaaS | 13% | 7% | 11% | 8% | 11% | 11% | 7% | 7% |
| 60% Private vehicle - 40% MaaS | 12% | 7% | 12% | 5% | 11% | 9% | 5% | 6% |
| 50% Private vehicle - 50% MaaS | 18% | 12% | 16% | 16% | 19% | 18% | 13% | 13% |
| 40% Private vehicle - 60% MaaS | 9% | 4% | 7% | 3% | 6% | 5% | 3% | 4% |
| 30% Private vehicle - 70% MaaS | 8% | 3% | 5% | 3% | 6% | 6% | 4% | 4% |
| 20% Private vehicle - 80% MaaS | 4% | 4% | 4% | 2% | 4% | 5% | 4% | 2% |
| 10% Private vehicle - 90% MaaS | 1% | 2% | 3% | 1% | 3% | 3% | 3% | 2% |
| 0% Private vehicle - 100% MaaS | 1% | 10% | 3% | 18% | 6% | 5% | 11% | 7% |

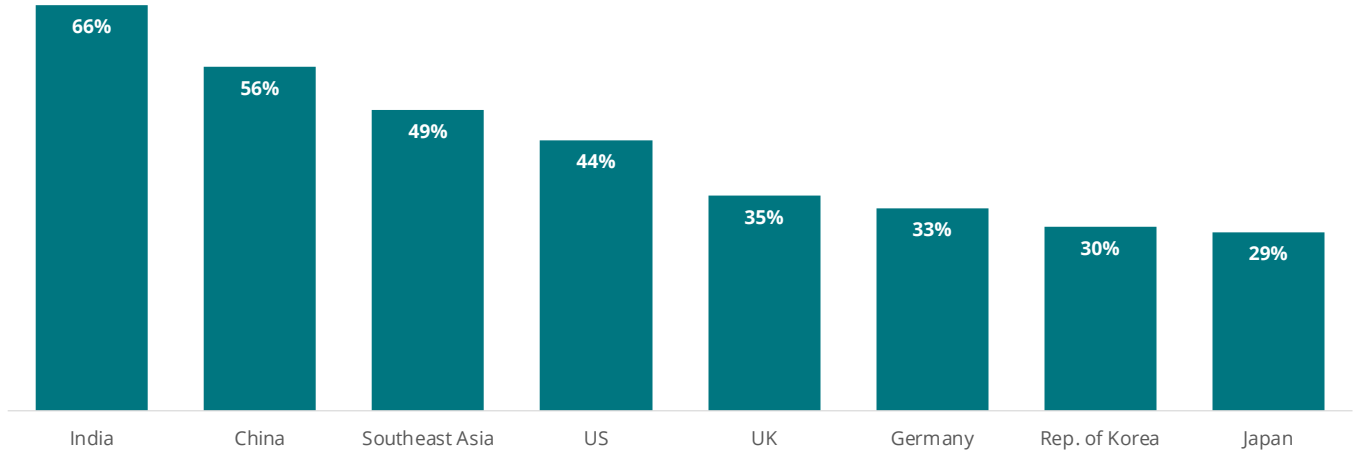
Note: Percentages may not add up to 100 due to rounding.

Q66. Ideally, what percentage of your overall mobility needs would you like to address with the following types of transportation in five years?

Sample size: n = 1,001 [China]; 1,507 [Germany]; 1,000 [India]; 1,000 [Japan]; 1,012 [Republic of Korea]; 6,029 [Southeast Asia]; 1,505 [UK]; 1,002 [US]

A large number of younger consumers surveyed in some markets are at least somewhat interested in giving up vehicle ownership in favor of a subscription model, perhaps reflecting a backdrop of uncertain economic conditions causing concern for financial capacity.

Interested in giving up vehicle ownership in favor of vehicle subscription (% somewhat/very interested) – 18- to 34-year-old respondents



Q69. To what extent are you interested in giving up vehicle ownership in favor of subscribing to the use of a vehicle going forward?
Sample size: n = 261 [China]; 344 [Germany]; 404 [India]; 191 [Japan]; 246 [Republic of Korea]; 2,116 [Southeast Asia]; 392 [UK]; 286 [US]

5 About the study



About the study

The 2025 study includes ~31,000 consumer responses from 30 countries around the world.

| Americas | Sample |
|--------------------|--------|
| Argentina (AR) | 1,019 |
| Canada (CA) | 1,001 |
| Mexico (MX) | 1,008 |
| United States (US) | 1,002 |

| EMEA | Sample |
|---------------------------|--------|
| Austria (AT) | 1,006 |
| Belgium (BE) | 999 |
| Czech Republic (CZ) | 1,009 |
| France (FR) | 1,014 |
| Germany (DE) | 1,507 |
| Hungary (HU) | 1,010 |
| Italy (IT) | 1,019 |
| Netherlands (NL) | 1,024 |
| Poland (PL) | 1,020 |
| Saudi Arabia (SA) | 1,024 |
| Spain (ES) | 1,021 |
| Sweden (SE) | 1,010 |
| Turkey (TR) | 1,007 |
| United Arab Emirates (AE) | 1,021 |
| United Kingdom (UK) | 1,505 |

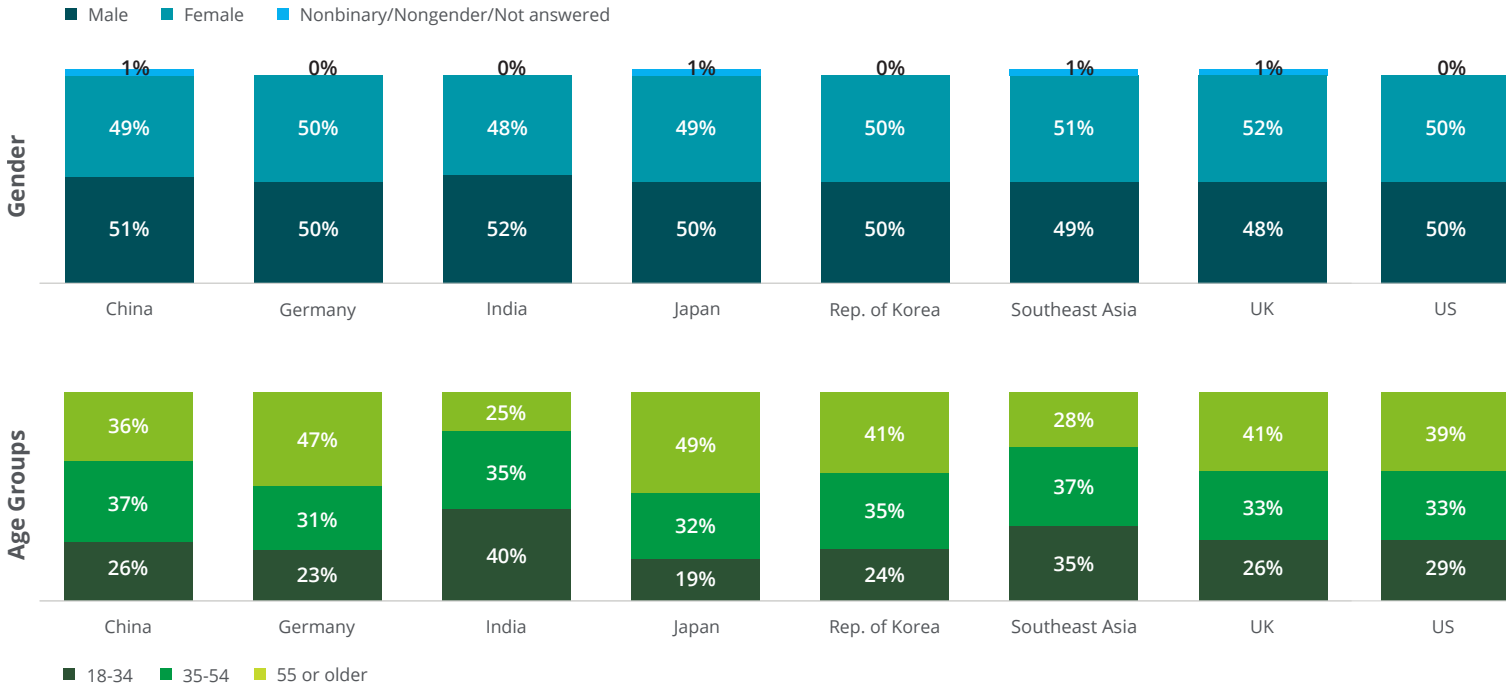
| Asia-Pacific | Sample |
|------------------------|--------|
| Australia (AU) | 1,022 |
| China (CN) | 1,001 |
| India (IN) | 1,000 |
| Indonesia (ID) - SEA | 1,004 |
| Japan (JP) | 1,000 |
| Malaysia (MY) - SEA | 1,007 |
| Philippines (PH) - SEA | 1,009 |
| Republic of Korea (KR) | 1,012 |
| Singapore (SG) - SEA | 1,007 |
| Thailand (TH) - SEA | 1,017 |
| Vietnam (VN) - SEA | 985 |

Study methodology

The study is fielded October-December 2024 using an online panel methodology where consumers of driving age were invited to complete the questionnaire (translated into local languages) via email.

Note: "Sample" represents the number of survey respondents in each country; SEA refers to Southeast Asia.

Study demographics



Note: Percentages may not add to 100 due to rounding.

Note: Nonbinary/Nongender confirming/Prefer not to answer percentages were less than 1%; Southeast Asia region comprises Indonesia, Malaysia, Philippines, Singapore, Thailand, and Vietnam markets.

Sample size: n = 1,001 [China]; 1,507 [Germany]; 1,000 [India]; 1,000 [Japan]; 1,012 [Republic of Korea]; 6,029 [Southeast Asia]; 1,505 [UK]; 1,002 [US]

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