Deloitte.

2026 Deloitte Global Automotive Consumer Study

Key findings: Australian market

March 2026

Deloitte.

March 2026

Dear Reader,

The global automotive industry is moving through one of the most transformative periods in its history. While innovation across the value chain continues to accelerate, the industry's centre of gravity remains the consumer—whose expectations around value, access, and experience are changing. Consumers are becoming more value-driven, seeking fairness, trust, and transparency alongside quality and innovation. Rising vehicle prices and higher financing costs have brought affordability to the forefront, prompting many to reconsider what defines value in mobility and what they expect from vehicle brands.

The global transition toward zero-emission mobility remains a defining industry challenge, with the regional policy landscape is evolving in complex ways. In Europe and Asia, manufacturers are reimagining the path to sustainability by developing alternative mobility models rooted in more affordable, "greener" vehicles that can bring the energy transition within reach for a broader base of consumers. In the US, the withdrawal of purchase incentives, more flexible emissions targets, and rising trade barriers are influencing both pricing and production strategies. Automakers are responding by expanding hybrid portfolios, refining internal-combustion offerings, and localising manufacturing to balance regulatory shifts with consumer access and affordability.

The rise of software-defined vehicles is helping to reshape many aspects of the value chain, turning cars into intelligent, connected platforms that continue to evolve long after purchase. Regular over-the-air updates are helping extend vehicle lifespans and enhance ownership experiences, giving consumers new reasons to keep vehicles longer while staying current with technology. Connectivity, meanwhile, remains central to this transformation—linking vehicles, services, and ecosystems in ways that redefine the mobility experience.

These shifts are unfolding amid an environment of trade complexity, economic recalibration, and supply chain localisation. In this context, collaboration, adaptability, and transparency are becoming an increasingly important factor to maintain resilience, profitability, and consumer trust.

For more than a decade, Deloitte's Global Automotive Consumer Study has served as a lens through which to view this rapidly evolving landscape. This year's edition continues that tradition, drawing on insights from more than 28,000 consumers across 27 key automotive markets worldwide. The findings explore how consumer attitudes toward electrification, brand loyalty, connectivity, and digital experiences are shaping the future of mobility.

This report focuses on eight of the largest global auto markets, presenting key insights in five sections, covering electric vehicle adoption, future buying intentions, connectivity, software-defined vehicles, and servicing behaviour. For more information, including a deeper dive of study results for participating countries, please click here to access the online interactive dashboard.

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

Kind regards,

Dale McCauley
AUS Automotive Sector Leader
dmccauley@deloitte.com.au

Lee Peters
AUS Automotive Sector Leader
lepeters@deloitte.com.au

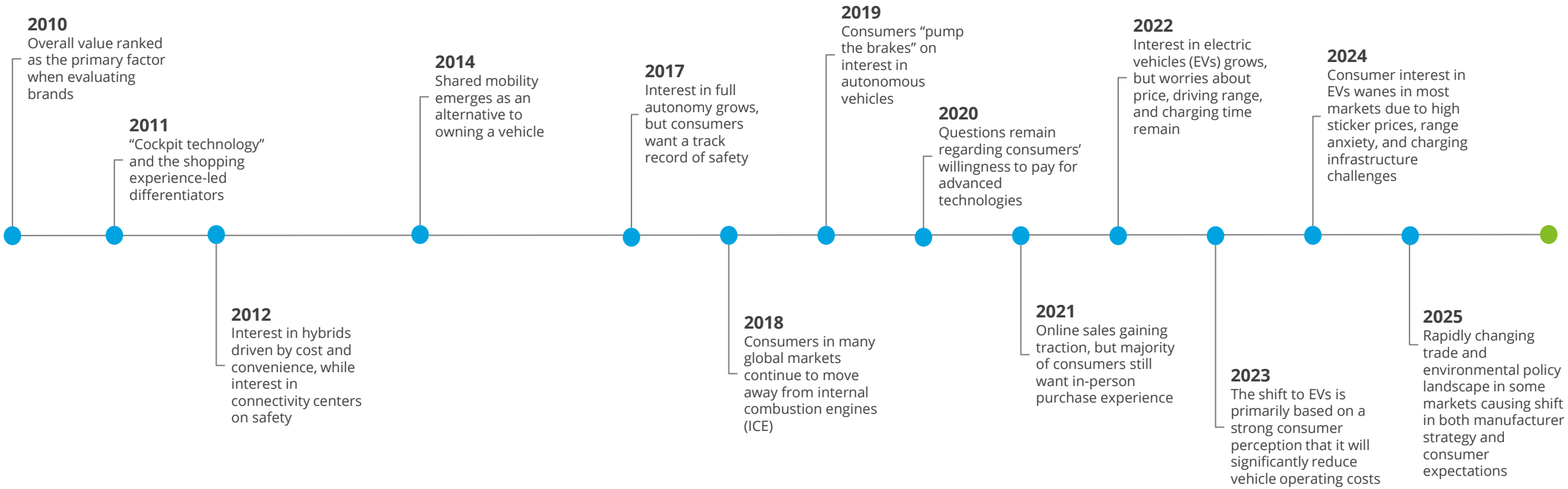
Lisa Walker
US Automotive Sector Leader
Deloitte Consulting LLP
lisawalker@deloitte.com

Dr. Harald Proff
Global Automotive Sector Leader
Deloitte Global
hproff@deloitte.de

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

Deloitte.

Key themes emerging over the years include:



Consumer Check-Up: Australia 2026

One third of consumers are feeling more anxious on a week-to-week basis, driven primarily by a concern over personal financial capacity and direction of the economy. New vehicle features and change in driving needs remaining the top consumer motivators required to overcome affordability concerns.

% of consumers concerned about...

Level of savings
46%

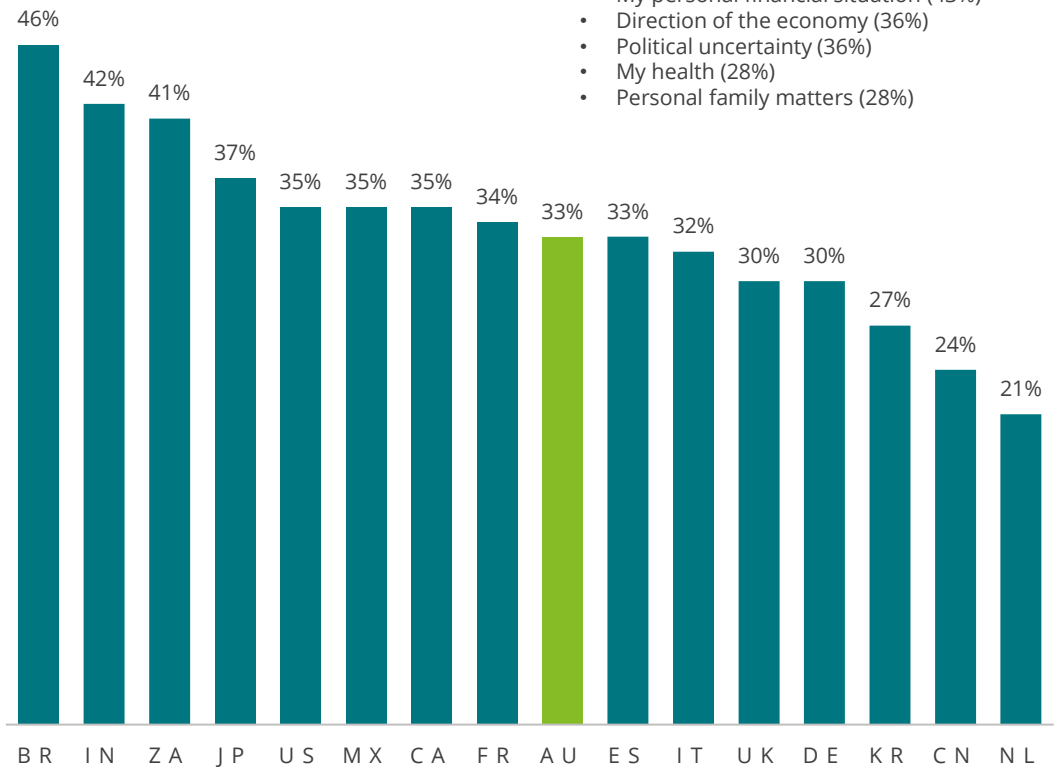
Making upcoming payments
19%

Credit card debt
20%

60%
of consumers feel new vehicles are unaffordable

22%
of consumers expecting higher gas prices next month

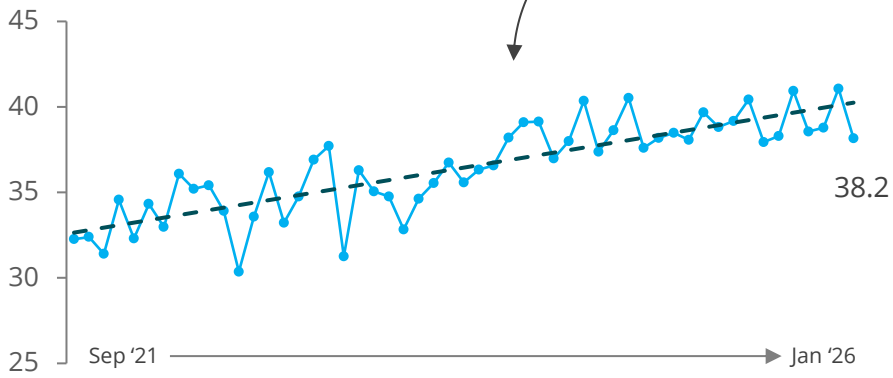
Percent of survey respondents feeling more anxious than last week
(% agree/strongly agree)



Top 5 drivers of anxiety
(% of respondents)

- My personal financial situation (43%)
- Direction of the economy (36%)
- Political uncertainty (36%)
- My health (28%)
- Personal family matters (28%)

Average daily driving distance (kms)



Potential trend drivers

- Return to the office
- Petrol prices

22%
of consumers intending to buy a car in next 6 months

32%
of consumers intend to stay with same vehicle brand

45%
of consumers intend to buy an EV next time in-market

Top 3 Purchase Motivators
(% of respondents)

- New vehicle features (26%)
- Ready for a change (20%)
- Driving needs have changed (16%)

Top 3 Barriers to Purchase
(% of respondents)

- Current vehicle is fine (56%)
- Cannot afford it right now (15%)
- Vehicle prices are too high (7%)

Source: Deloitte ConsumerSignals™; Deloitte Global State of the Consumer Tracker
Legend: Brazil [BR]I; India [IN]; South Africa [ZA]; Japan [JP]; United States [US]; Mexico [MX]; Canada [CA]; France [FR]; Australia [AU]; Spain [ES]; Italy [IT]; United Kingdom [UK]; Germany [DE]; South Korea [KR]; China [CN]; Netherlands [N:]

Contents

Key findings

Global battery electric vehicle (BEV) demand appears uneven across regions, while interest in hybrids continues to strengthen as consumers balance affordability, charging access, and everyday practicality.

Lower fuel costs remain a key motivator for consumers considering electrified options, yet concerns around driving range, charging time, public-charging availability, and battery performance continue to shape adoption. Most EV intenders prefer to charge at home while cost remains an important factor in public-charging decisions. At the same time, uncertainty around who should manage end-of-life batteries signals broader ecosystem gaps that should be addressed as electrification scales.

Brand loyalty continues to shift, with greater intended brand switching in markets with many first-time owners.

Consumers in Australia show one of the highest switching intents, emphasising the need for original equipment manufacturers (OEMs) to compete on product quality, performance, and value. Across markets, dealer visits and manufacturer websites remain the most used research sources, and getting a good deal, transparent pricing, and physically experiencing the vehicle continue to play a central role in purchase decisions.

Consumers place the greatest value on connected features that enhance safety and security, while concerns about data-sharing remain high.

Emergency assistance, pedestrian detection, and anti-theft tracking draw the strongest willingness to pay, whereas data from synced devices, in-cabin cameras, and vehicle location raise the most concern, highlighting the need for greater trust and transparency in connected services.

Many consumers are open to artificial intelligence (AI)-driven personalisation and over-the-air (OTA)-enabled enhancements that extend a vehicle's usefulness over time.

Consumers in most markets view software-defined vehicles (SDVs) as valuable, particularly when ongoing OTA updates can add features, improve safety, or boost performance. Many are willing to use AI-enabled customisation that adapts settings automatically, and a large share would keep vehicles longer if updates continued throughout ownership, positioning software as a key lever for enhancing loyalty and expanding software-based revenue opportunities.

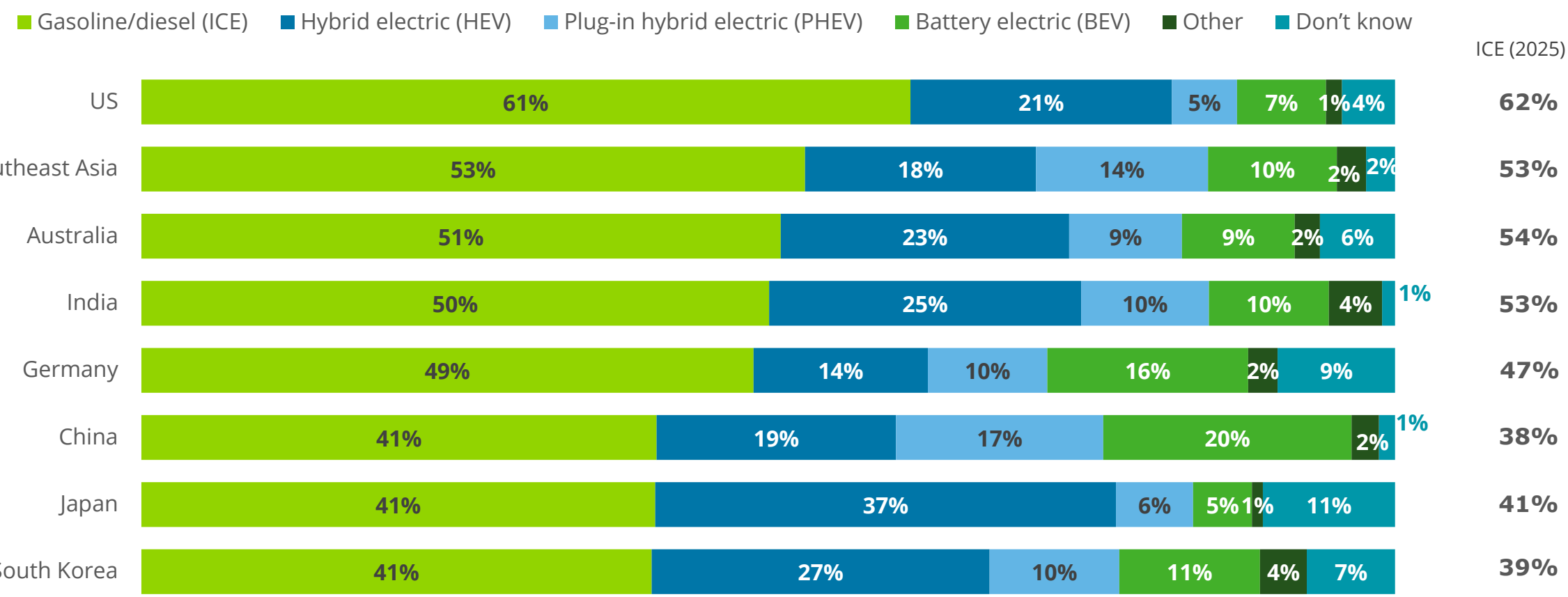
Consumers prioritise service quality, trust, and transparency when choosing and evaluating vehicle service providers.

Authorised dealers remain the most common service destination, though independents hold a strong presence in some markets. Quality of work and trust are the primary reasons for choosing a provider, while clear explanations of pricing and the work performed define the service experience.

1 Vehicle electrification

Similar to preferences in other established markets, one in two Australian respondents continue to prefer ICE vehicles over EV alternatives. The increased availability of EVs and legislative influences may see this trend shift in the coming years.

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= 934 [Australia]; 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 944 [US]

Lower fuel cost remains one of the top reasons survey respondents cite for wanting an electrified vehicle the next time they are in the market — signaling a strong desire to mitigate long-standing concerns around total cost of ownership — followed by environment concerns and the overall driving experience.

Top reasons to choose an EV as next vehicle

Factors	Australia	China	Germany	India	Japan	South Korea	Southeast Asia	US
Concern for the environment	**36%**	23%	**41%**	**43%**	25%	**35%**	38%	**38%**
Concern about personal health	13%	23%	15%	33%	10%	16%	25%	12%
Lower fuel costs	**58%**	32%	**39%**	**47%**	**47%**	**55%**	**51%**	**52%**
Less maintenance	28%	13%	22%	35%	15%	**34%**	37%	28%
Ability to use the vehicle as a backup battery/power source	17%	21%	15%	34%	24%	15%	29%	17%
Peer pressure	5%	8%	2%	9%	2%	5%	6%	3%
Better lifestyle experience beyond driving	24%	**34%**	14%	**49%**	17%	23%	37%	26%
Driving experience	**35%**	**36%**	26%	**43%**	26%	32%	**43%**	**30%**
Government incentives/subsidies/ stimulus programs	23%	27%	**33%**	33%	25%	32%	31%	19%
Potential for extra taxes/levies applied to internal combustion engine vehicles	14%	18%	17%	27%	4%	16%	20%	13%
Potential ban on sale of new internal combustion engine vehicles	14%	15%	20%	23%	6%	11%	16%	9%
Availability of charging stations	25%	30%	28%	38%	**33%**	18%	**43%**	27%
Faster charging speed	26%	**37%**	26%	**43%**	31%	26%	**42%**	26%
Longer range	26%	**37%**	28%	28%	**34%**	28%	32%	28%
Better resale value	16%	15%	10%	26%	13%	9%	21%	12%
Brand reputation	25%	24%	12%	35%	17%	17%	34%	22%
Brand image	11%	22%	9%	29%	16%	15%	25%	10%

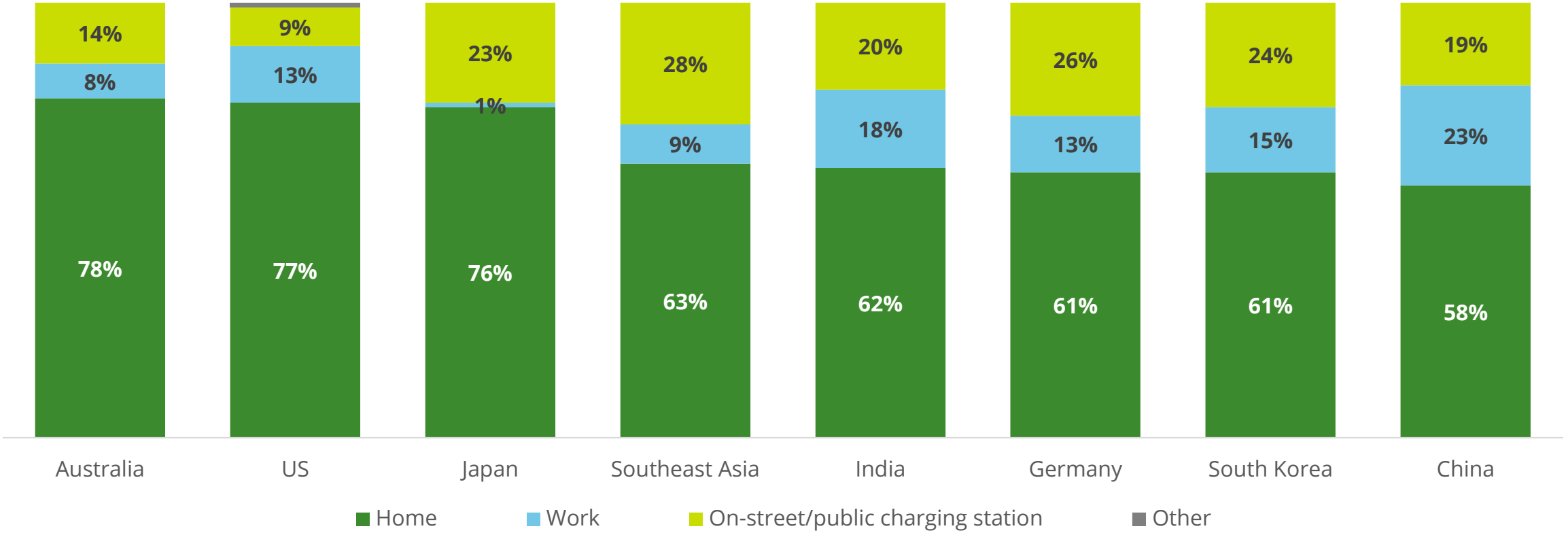
Q42. Which of the following factors have had the greatest impact on your decision to acquire an EV? Please select all that apply.

Sample size: n= 391 [Australia]; 476 [China]; 505 [Germany]; 601 [India]; 325 [Japan]; 441 [South Korea]; 2,204 [Southeast Asia]; 313 [US]

Top reasons

The push to create public charging capacity may be somewhat overstated in many markets as the majority of surveyed consumers plan to charge their vehicle at home. Nearly 80% of Australian consumers expect to charge their car at home.

Expecting to charge electrified vehicle most often at...



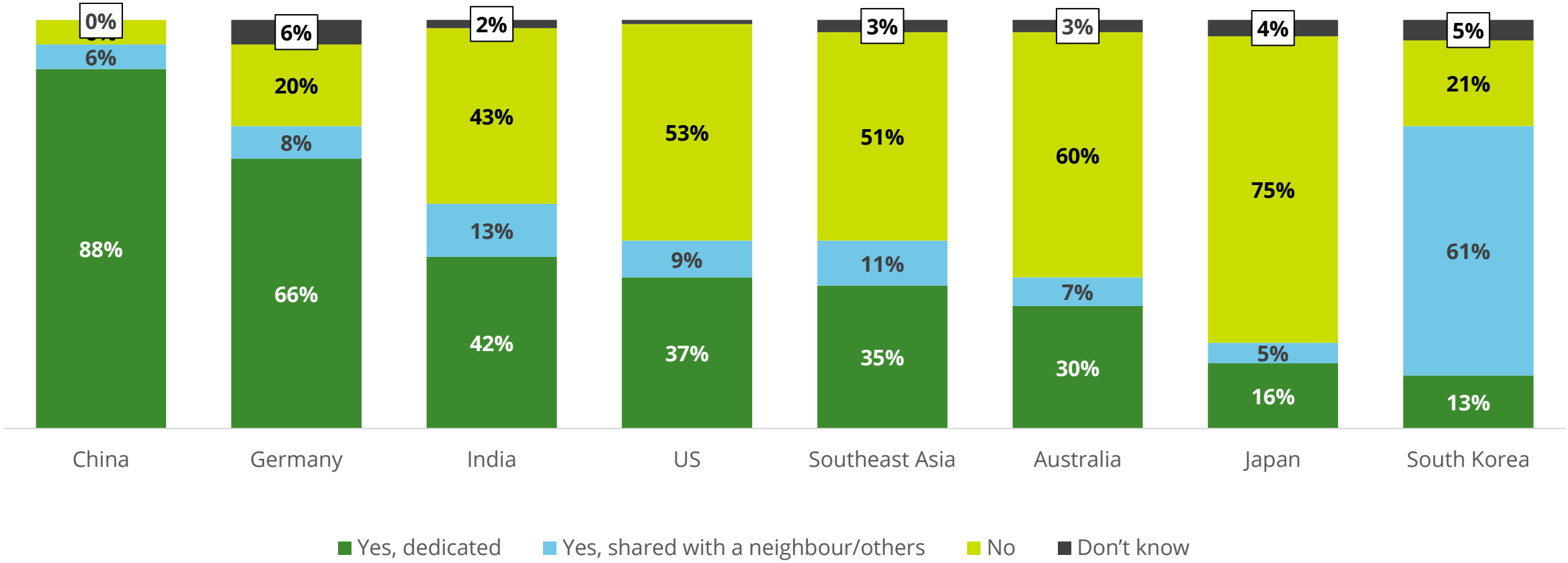
Note: Percentages may not add up to 100 due to rounding.

Q43. Where do you expect to charge your EV most often?

Sample size: n= 168 [Australia]; 312 [China]; 327 [Germany]; 266 [India]; 74 [Japan]; 196 [South Korea]; 1,247 [Southeast Asia]; 307 [UK]; 116 [US]

Yet, 60% of Australian respondents do not have access to a charger at home. This may be a source of concern for buyers that have not accounted for the additional installation cost.

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= 132 [Australia]; 180 [China]; 199 [Germany]; 166 [India]; 56 [Japan]; 783 (South East Asia]; 119 [South Korea]; 89 [US]

When charging their vehicle away from home, most EV intenders prefer a dedicated charging station over a traditional service station equipped with EV charging capabilities.

Preference for public EV charging location

Public places	Australia	China	Germany	India	Japan	South Korea	Southeast Asia	US
Dedicated EV charging station	**40%**	**36%**	15%	**47%**	**24%**	**47%**	**36%**	**47%**
Traditional gas station with EV chargers	21%	17%	**27%**	21%	18%	13%	30%	20%
Vehicle dealership	4%	10%	3%	5%	8%	1%	3%	4%
Retail outlet/mall	12%	4%	17%	2%	22%	3%	8%	11%
Parking lot	14%	14%	5%	11%	20%	27%	13%	8%
On-street parking	4%	9%	24%	8%	0%	4%	3%	3%
Community/public building	4%	9%	5%	5%	4%	6%	4%	3%
Hotel	1%	1%	3%	2%	4%	1%	1%	3%
Other	1%	0%	2%	0.4%	0%	0%	0.2%	0%

Most preferred location

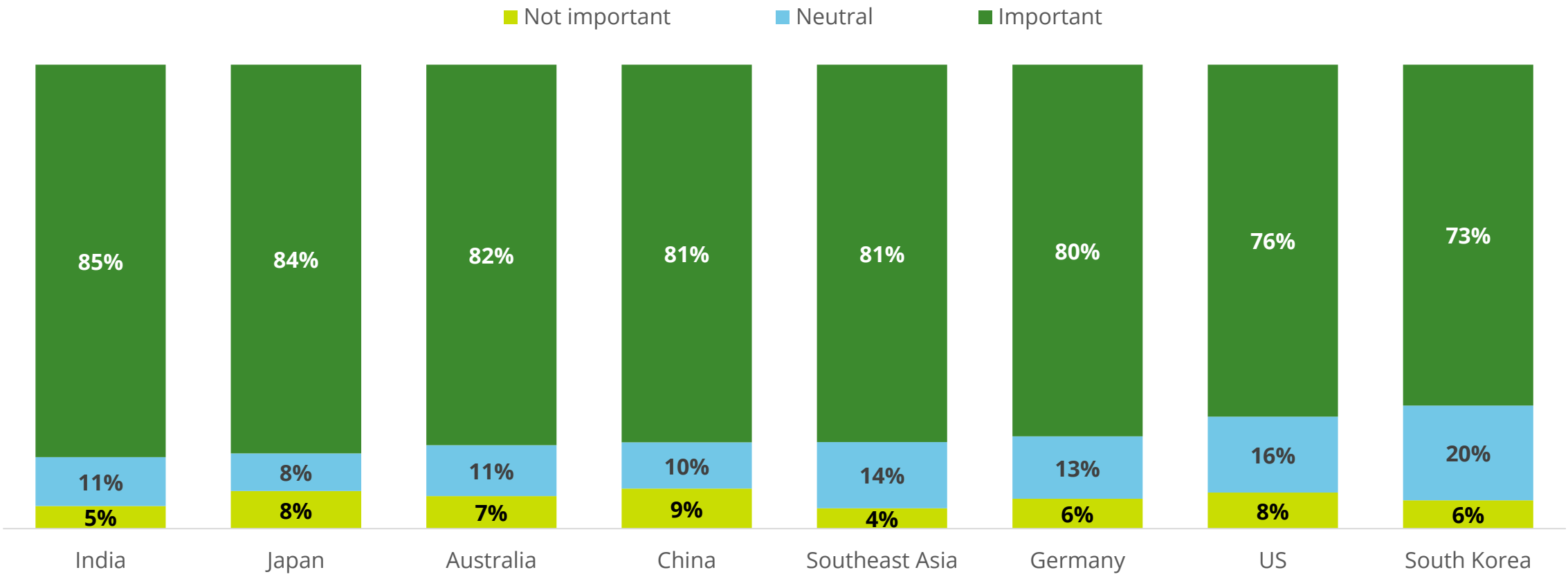
Note: Percentages may not add up to 100 due to rounding.

Q45. Where would you most want to charge your EV when you are away from home?

Sample size: n= 169 [Australia]; 312 [China]; 327 [Germany]; 266 [India]; 74 [Japan]; 196 [South Korea]; 1,247 [Southeast Asia]; 116 [US]

Like surveyed consumers across the major markets, for Australians, charging cost is the most important factor when choosing a public location to charge an EV. This highlights the importance of affordable charging rates for cost-conscious consumers.

Importance of charging cost when choosing public EV charging



Note: Percentages may not add up to 100 due to rounding; importance % is a sum of somewhat important and very important.

Q46. How important is charging cost when it comes to choosing a public location to charge your vehicle?

Sample size: n= 169 [Australia]; 312 [China]; 327 [Germany]; 266 [India]; 74 [Japan]; 196 [South Korea]; 1,247 [Southeast Asia]; 116 [US]

Card payments are the most preferred method for public EV charging payment in Australia, whilst the larger Asian markets like China and India prefer a smartphone app or QR-code based payments.

Preferred method to pay for public EV charging

Payment method	Australia	China	Germany	India	Japan	South Korea	Southeast Asia	US
Charging network app on your smartphone	19%	**47%**	20%	14%	14%	14%	**35%**	29%
Credit/debit card	**61%**	8%	**57%**	27%	**47%**	**70%**	22%	**48%**
Pre-paid subscription plan	5%	8%	6%	11%	4%	5%	9%	9%
Loyalty points	7%	12%	3%	6%	4%	6%	3%	3%
Charging card/badge/pass provided by a third-party player	6%	8%	8%	9%	0%	5%	6%	7%
QR code/UPI	1%	16%	5%	**33%**	31%	1%	25%	2%
Other	1%	0%	0%	0%	0%	0%	0.2%	1%

Most preferred

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

Q47. How would you most prefer to pay for public EV charging?

Sample size: n= 169 [Australia]; 312 [China]; 327 [Germany]; 266 [India]; 74 [Japan]; 196 [South Korea]; 1,247 [Southeast Asia]; 116 [US]

Range anxiety, price premiums, charging time and the cost of battery replacement are the main concerns for Australian consumers regarding BEVs

Greatest concern regarding all BEVs

Concern	Australia	China	Germany	India	Japan	South Korea	Southeast Asia	US
Driving range	**45%**	**30%**	**49%**	36%	37%	27%	**40%**	**47%**
Cost/price premium	**43%**	25%	**41%**	32%	**41%**	25%	37%	**40%**
Cold weather performance	21%	**32%**	36%	34%	22%	**39%**	26%	31%
Increased need to plan my trips	24%	17%	19%	26%	29%	10%	20%	21%
Uncertain resale value	25%	14%	24%	25%	16%	13%	25%	15%
Potential for extra taxes/levies associated with BEVs	19%	16%	8%	27%	10%	12%	19%	16%
Time required to charge	**41%**	**30%**	**41%**	**41%**	**42%**	**38%**	**44%**	**44%**
Ongoing charging and running costs	30%	**28%**	24%	27%	25%	22%	30%	26%
Cost to eventually replace the battery	**40%**	**30%**	37%	34%	36%	30%	**38%**	38%
Lack of knowledge or understanding about EVs/EV technology	23%	17%	16%	30%	12%	15%	32%	23%
Lack of public EV charging infrastructure	**39%**	20%	40%	**43%**	37%	31%	**40%**	37%
Lack of charger at home	35%	16%	**39%**	31%	**45%**	20%	29%	35%
Lack of alternate power source (e.g., solar) at home	20%	13%	23%	28%	22%	14%	26%	21%
Safety concerns with battery technology	35%	**32%**	30%	**38%**	31%	**50%**	37%	27%
End-to-end sustainability (i.e., battery manufacturing/recycling)	20%	21%	23%	34%	11%	13%	22%	20%
Lack of choice regarding brands/models	11%	12%	9%	24%	7%	7%	13%	9%

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

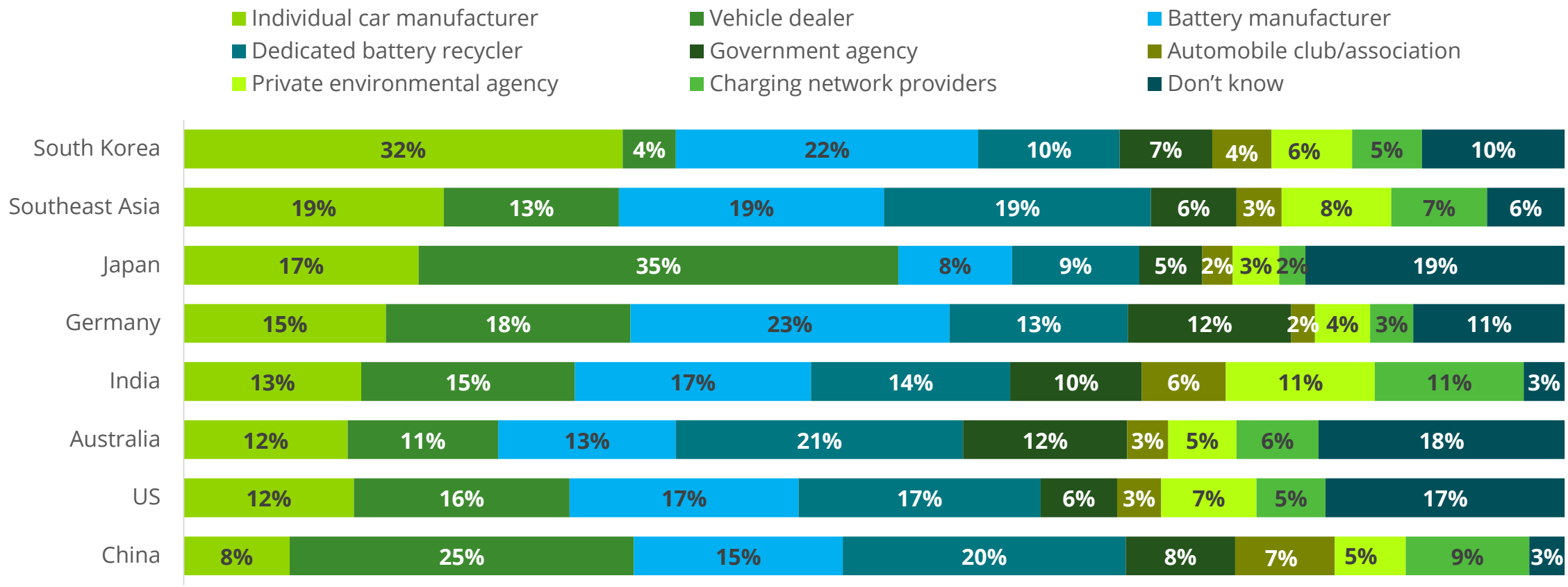
Most commonly cited

Q48. What are your biggest concerns regarding all battery-powered EVs? (Please select all that apply.)

Sample size: n= 934 [Australia]; 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 944 [US]

Opinions vary on who should oversee end-of-life EV battery management, surveyed consumers assign this responsibility to dedicated recycling facilities, battery manufacturers or government agencies - highlighting the lack of clear direction on how this important piece of the emerging ecosystem could evolve.

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



Note: Percentage for "Other" not shown. Total percentages may not add up to 100 as "Other" percentage is not shown and/or due to rounding.

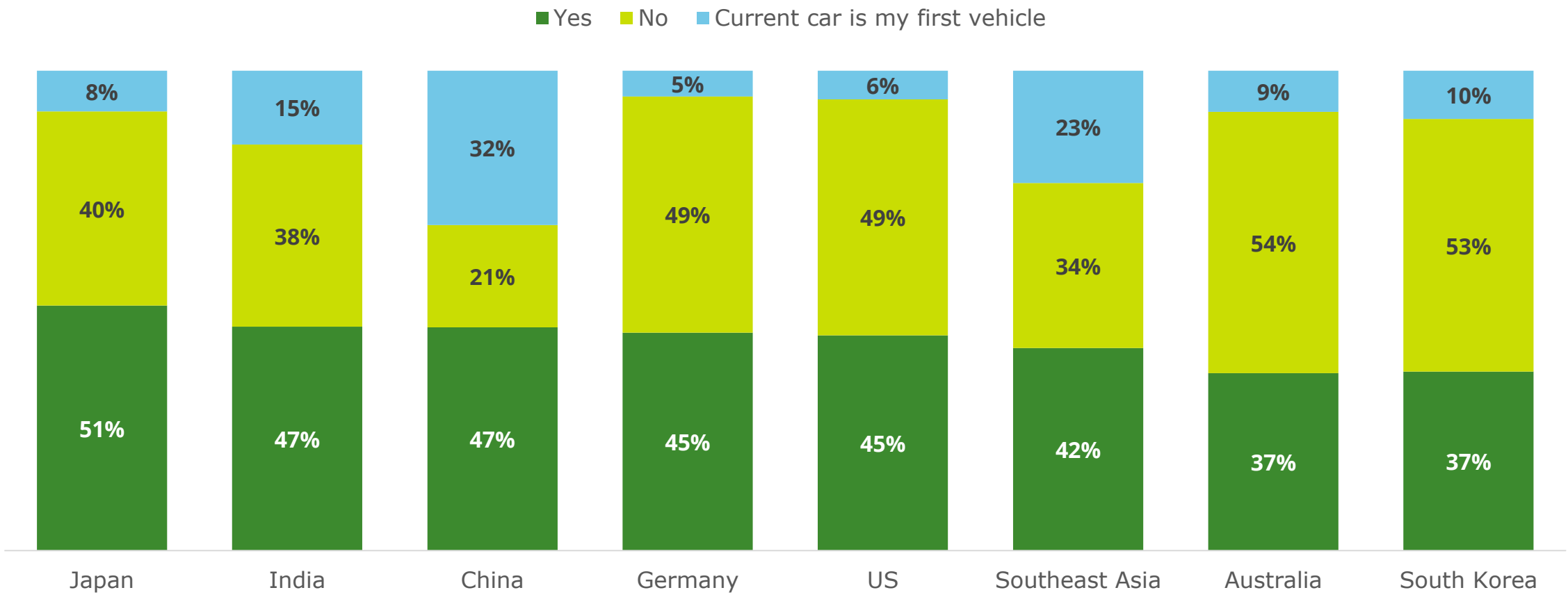
Q49. Who do you think should be responsible for collecting, storing, and recycling electric vehicle batteries after their useful lives?

Sample size: n= 934 [Australia]; 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 944 [US]

2 Future vehicle intentions

Over half of Australian consumers surveyed currently own a car that is a different brand to their prior vehicle, highlighting the diminishing value of brand loyalty in the market.

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



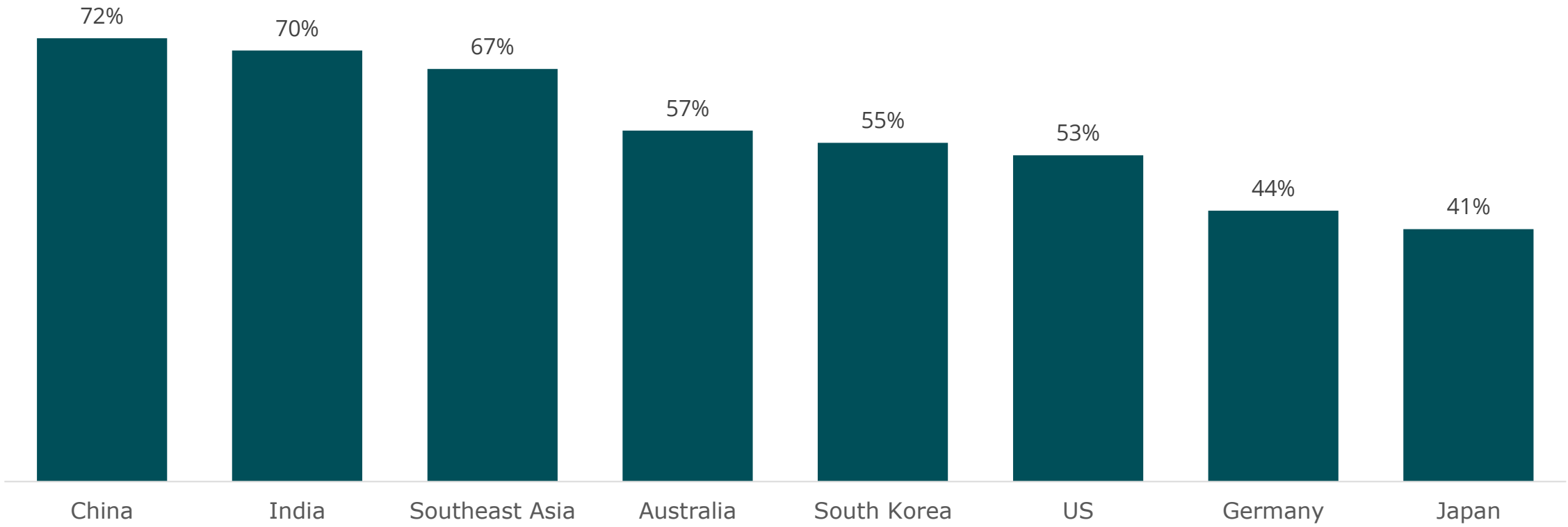
Note: Percentages may not add up to 100 due to rounding.

Q9. Was your prior vehicle from the same brand?

Sample size: n= 830 [Australia] 905 [China]; 1,119 [Germany]; 1,048 [India]; 519 [Japan]; 646 [South Korea]; 3,870 [Southeast Asia]; 836 [US]

57% of Australian consumers have expressed their intention to switch to another brand for their next vehicle, this is up from 51% in 2025. This reinforces the importance of focusing on the drivers of brand value over price to win and retain customers in competitive, rapidly evolving markets.

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 [Australia]; 778 [China]; 1,040 [Germany]; 1,021 [India]; 463 [Japan]; 613 [South Korea]; 3,667 [Southeast Asia]; 811 [US]

Product quality, price, and performance continue to be the leading drivers of brand choice amongst Australian consumers.

Most important factors driving the choice of brand for next vehicle

Drivers of brand choice	Australia	China	Germany	India	Japan	South Korea	Southeast Asia	US
Previous sales experience	11%	15%	26%	21%	19%	5%	15%	13%
Previous service experience	19%	20%	20%	25%	16%	14%	19%	20%
Product quality	**56%**	**38%**	**50%**	**58%**	**46%**	**49%**	**59%**	**58%**
Brand advertising	8%	14%	3%	26%	4%	5%	12%	8%
Brand image	15%	32%	14%	45%	17%	22%	34%	17%
Brand affiliations (e.g., sponsorships, partners)	7%	16%	5%	26%	5%	5%	11%	7%
Brand familiarity	31%	**35%**	**39%**	41%	23%	21%	30%	34%
Quality of overall ownership experience	33%	24%	38%	46%	8%	26%	35%	38%
Vehicle features/technology	36%	34%	30%	**50%**	42%	39%	46%	35%
Availability of battery electric vehicles/hybrid options	16%	24%	14%	35%	15%	19%	23%	13%
Vehicle performance (e.g., fuel efficiency, battery range)	**53%**	**40%**	34%	**57%**	**49%**	**54%**	**57%**	**51%**
Price	**55%**	20%	**54%**	44%	**52%**	**43%**	**49%**	**46%**
Vehicle service and maintenance network	25%	23%	20%	43%	19%	29%	38%	22%
Easy financing options	14%	16%	12%	32%	7%	11%	23%	15%

Most commonly cited

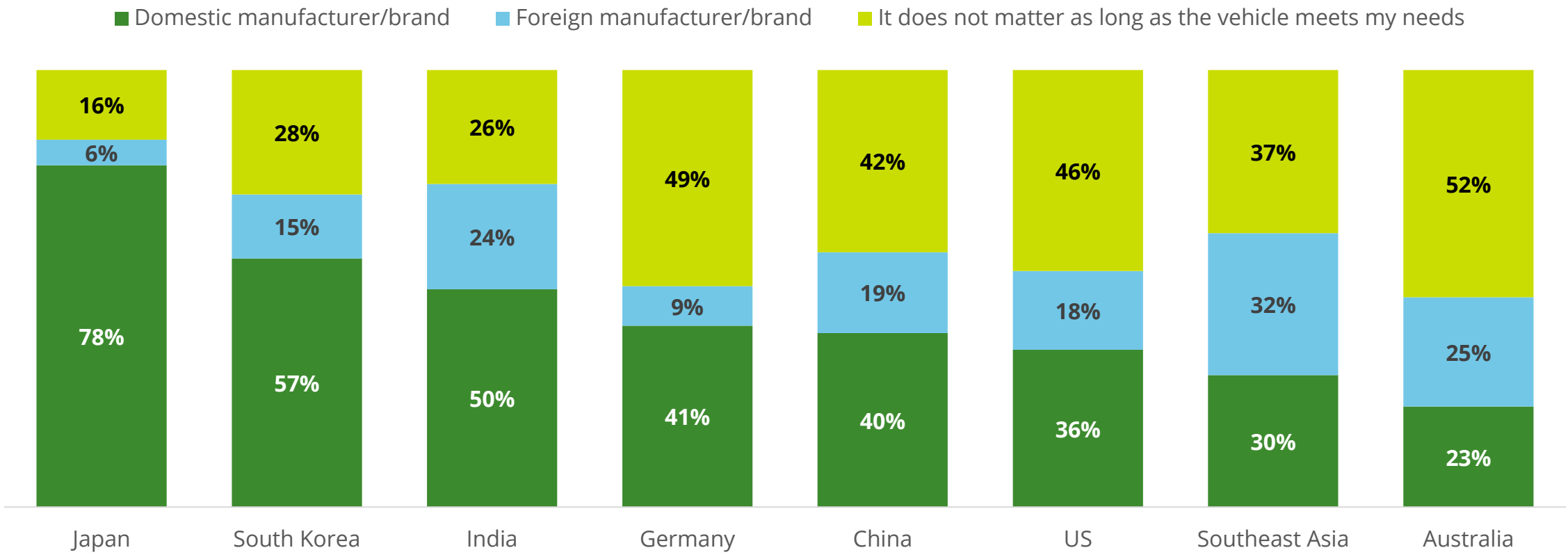
Note: Sum of the percentages exceed 100% as respondents can select multiple options; "Other" not shown due the low response rate.

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

Sample size: n= 934 [Australia]; 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 944 [US]

Due to the lack of local manufacturing, domestic brand preference is far lower in Australia compared to that of Japan and South Korea, underscoring how brand origin can play a very different role in consumer decision-making across markets.

Preferred organisations for next vehicle purchase



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

Q50. From which of the following are you most interested in acquiring your next vehicle?

Sample size: n= 934 [Australia]; 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 944 [US]

Traditional methods such as dealer visits continues to be the most used information source for next vehicle research, followed closely by the manufacturers' website. The growth of digital channels has led to the reliance of printed media diminishing over the years.

Information sources for next vehicle purchase

Information sources	Australia	China	Germany	India	Japan	South Korea	Southeast Asia	US
Word of mouth	34%	36%	33%	40%	25%	22%	31%	31%
Printed media	11%	15%	11%	28%	11%	5%	15%	11%
Online media and auto portals	29%	38%	34%	50%	27%	40%	46%	34%
Vehicle owner forum/blogs	24%	30%	16%	40%	9%	22%	32%	23%
Social media and influencer reviews	25%	24%	16%	**59%**	20%	35%	**53%**	25%
Manufacturer website	**45%**	40%	40%	54%	**50%**	30%	47%	42%
Dealer website	40%	38%	36%	41%	29%	21%	40%	40%
Dealer visit	**48%**	**42%**	**56%**	46%	49%	**46%**	52%	**47%**

Most commonly cited

Q30. Which of the following sources would you use to gather information about your next vehicle? Please select all that apply.

Sample size: n= 934 [Australia]; 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 944 [US]

According to survey respondents, the most important aspects of their next vehicle purchase experience centre on obtaining a good deal with transparent pricing and direct physical interaction—reinforcing why dealer visits remain a preferred source of information for many consumers.

Most important aspects of next vehicle purchase experience

Drivers of brand choice	Australia	China	Germany	India	Japan	South Korea	Southeast Asia	US
Getting all my questions answered	27%	29%	30%	26%	13%	14%	28%	27%
Making good use of my time	16%	25%	10%	**28%**	11%	16%	21%	16%
Physical interaction with the vehicle (i.e., test drive)	**45%**	**35%**	**34%**	**40%**	**40%**	**24%**	**41%**	**40%**
Building trust in the salesperson	13%	28%	23%	21%	32%	21%	16%	14%
Ability to complete all or some of the process virtually	12%	17%	10%	26%	7%	11%	18%	13%
Convenient location	27%	25%	26%	21%	24%	21%	19%	23%
Getting a good deal	**60%**	**32%**	**62%**	**40%**	**53%**	**58%**	**48%**	**62%**
Transparent pricing	**51%**	**32%**	**33%**	**35%**	**47%**	**58%**	**47%**	**47%**
Low pressure experience	21%	13%	25%	15%	28%	12%	13%	27%
Having a resource for post-purchase needs	13%	**38%**	26%	21%	32%	**42%**	25%	15%
To be offered different financing and usage-based models	14%	25%	20%	27%	14%	21%	26%	16%

Most commonly cited

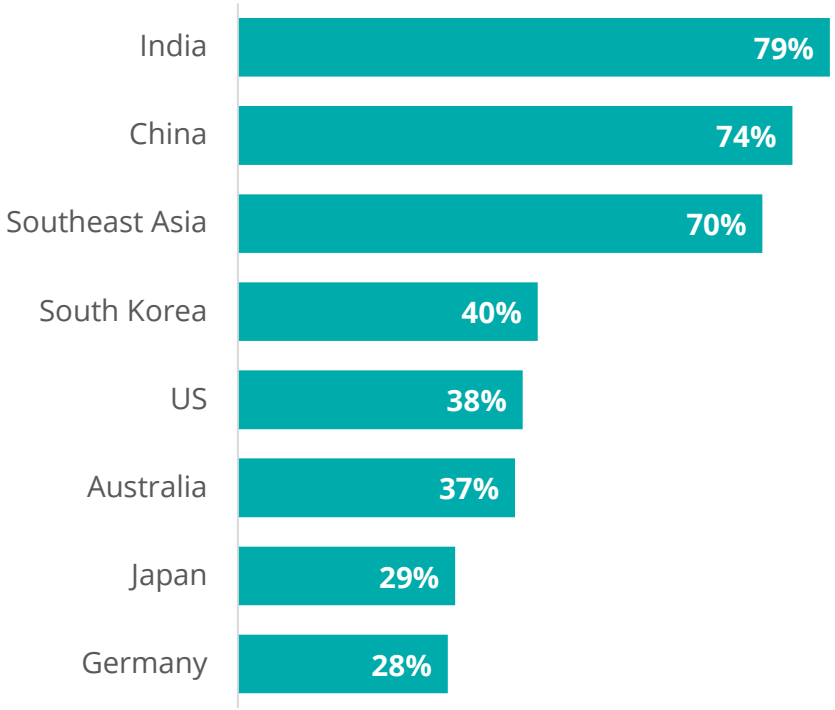
Note: Sum of the percentages exceeds 100% as respondents can select multiple options.

Q51. What are the top three most important aspects of your next vehicle purchase experience?

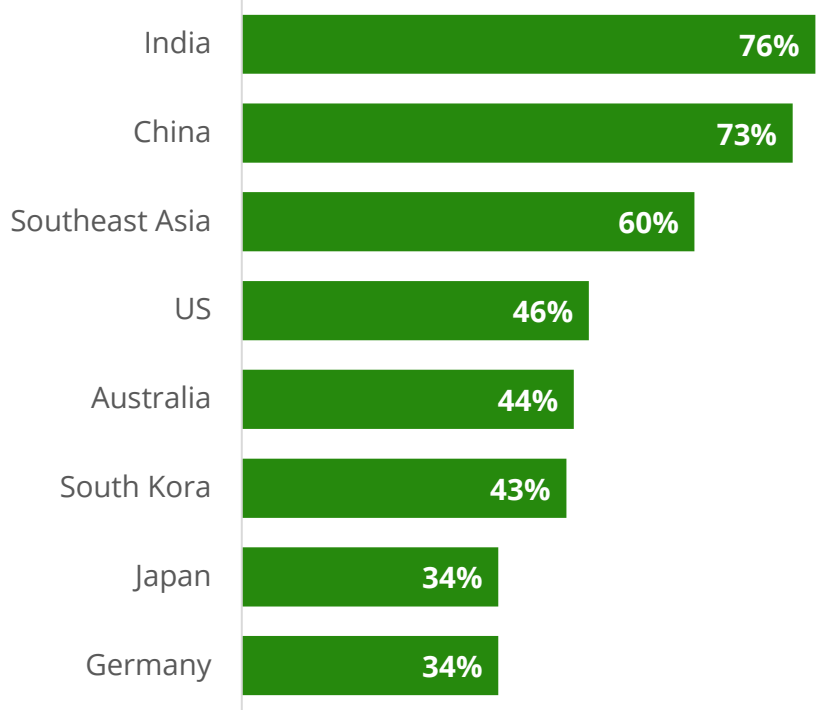
Sample size: n= 934 [Australia]; 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 944 [US]

As OEMs globally explore alternate sales and distribution models, Australian consumers have a lower appetite for the agency-style, direct-to-consumer concept when compared to other markets across the globe.

Percentage of surveyed consumers who would be interested in purchasing **insurance directly from the manufacturer** (% somewhat/very interested)



Percentage of surveyed consumers who would be interested in acquiring **vehicle directly from the manufacturer** (% somewhat/very interested)



Q39. The next time you acquire a vehicle, how interested would you be in purchasing insurance directly from the vehicle manufacturer?; Q40. To what extent are you interested in acquiring your next vehicle directly from the manufacturer (via an online process)?

Sample size: n= 934 [Australia]; 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5.196 [Southeast Asia]; 944 [US]

3 Connectivity

Survey respondents are most willing to pay for safety and security features — especially anti-theft tracking, emergency assistance, and automatic detection of other vehicles and pedestrians — eclipsing other convenience-oriented options.

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

Connected vehicle services	Australia	China	Germany	India	Japan	South Korea	Southeast Asia	US
Automatic detection of vehicles and pedestrians	**55%**	**70%**	**48%**	**79%**	**51%**	**72%**	73%	**59%**
Emergency assistance (e.g., collision detection)	**61%**	**73%**	**51%**	**85%**	**52%**	**72%**	**82%**	**58%**
Anti-theft tracking	**67%**	**73%**	**53%**	**84%**	**47%**	**65%**	**83%**	**61%**
Warranty/recall notices	53%	68%	40%	78%	33%	58%	72%	54%
App connectivity	45%	66%	31%	78%	22%	50%	69%	46%
Autonomous/remote parking	43%	69%	28%	75%	35%	54%	63%	37%
Infotainment functions (e.g., navigation, video streaming, etc.)	48%	65%	42%	77%	36%	62%	67%	50%
Vehicle health reporting and maintenance cost forecasts	50%	69%	38%	**79%**	32%	60%	**74%**	48%
Optimised vehicle insurance plan based on your driving habits	49%	69%	35%	77%	33%	54%	70%	47%
Digital key (e.g., using a smartphone to unlock/start vehicle)	43%	65%	28%	77%	33%	62%	67%	46%

Most commonly cited

Q52. To what extent would you be willing to pay extra for each of the following connected vehicle services?

Sample size: n= 934 [Australia]; 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 944 [US]

Yet, surveyed consumers are concerned about sharing connected-vehicle data like information from synced devices, in-cabin cameras, and biometrics — highlighting growing sensitivities around privacy and the handling of personally identifiable data.

Level of concern regarding data-sharing (% somewhat/very concerned)

Connected vehicle data	Australia	China	Germany	India	Japan	South Korea	Southeast Asia	US
Sensor data related to vehicle status (e.g., brake fluid level)	36%	**42%**	22%	67%	29%	42%	48%	39%
Data related to driving behavior (e.g., braking, acceleration, speed)	46%	40%	38%	66%	31%	46%	51%	53%
Data related to vehicle location (e.g., historic and real-time)	54%	39%	49%	**72%**	**43%**	**51%**	**56%**	**58%**
Biometric data collected by sensors in the cockpit (e.g., your heart rate)	**55%**	39%	**55%**	**70%**	32%	42%	52%	**56%**
Data related to the use of connected services (e.g., smartphone apps)	54%	**45%**	**52%**	**70%**	33%	45%	**56%**	55%
Data synced from connected devices (e.g., contacts, call logs, messages)	**60%**	**44%**	**58%**	**73%**	**40%**	**58%**	**60%**	**62%**
Data from in-cabin cameras (e.g., driver monitoring, eye-tracking, child presence detection)	**58%**	41%	**58%**	**72%**	**39%**	**49%**	**57%**	**58%**

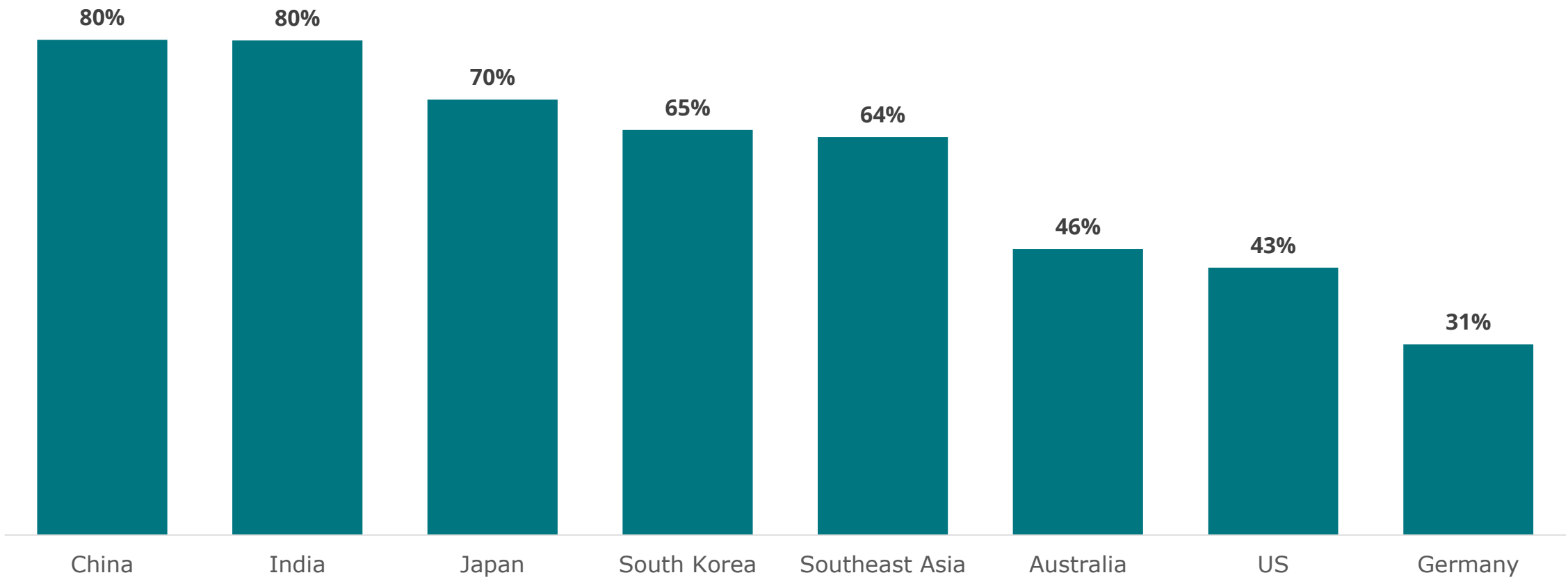
Most commonly cited

Q53. As vehicles become more and more connected to the internet, how concerned would you be if the following types of data were shared with your vehicle manufacturer, dealer, insurance company, and/or other third parties?

Sample size: n= 934 [Australia]; 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 944 [US]

Voice command support in local languages is less important in Australia compared to other Asia-Pacific markets, signalling a regional difference in digital engagement expectations.

Importance of next vehicle to support voice commands in local languages (% somewhat/very important)



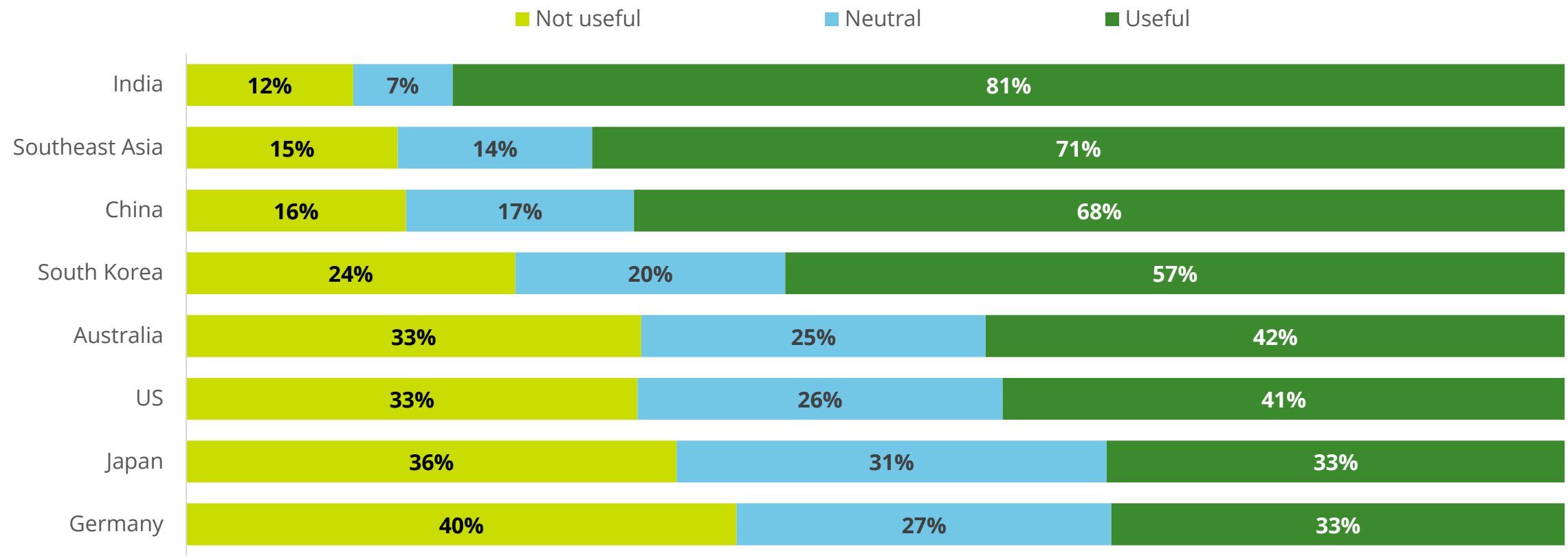
Q54. How important is it for your next vehicle to support voice commands in local languages?

Sample size: n= 934 [Australia]; 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 944 [US]

4 Software-defined vehicles

The perceived usefulness of software-defined vehicles is highest in developing economies, while enthusiasm is notably lower in mature markets, including Australia, the US, Japan, and Germany — highlighting a clear divide in comfort with software-centric vehicle concepts.

Perceived usefulness of software-defined vehicles



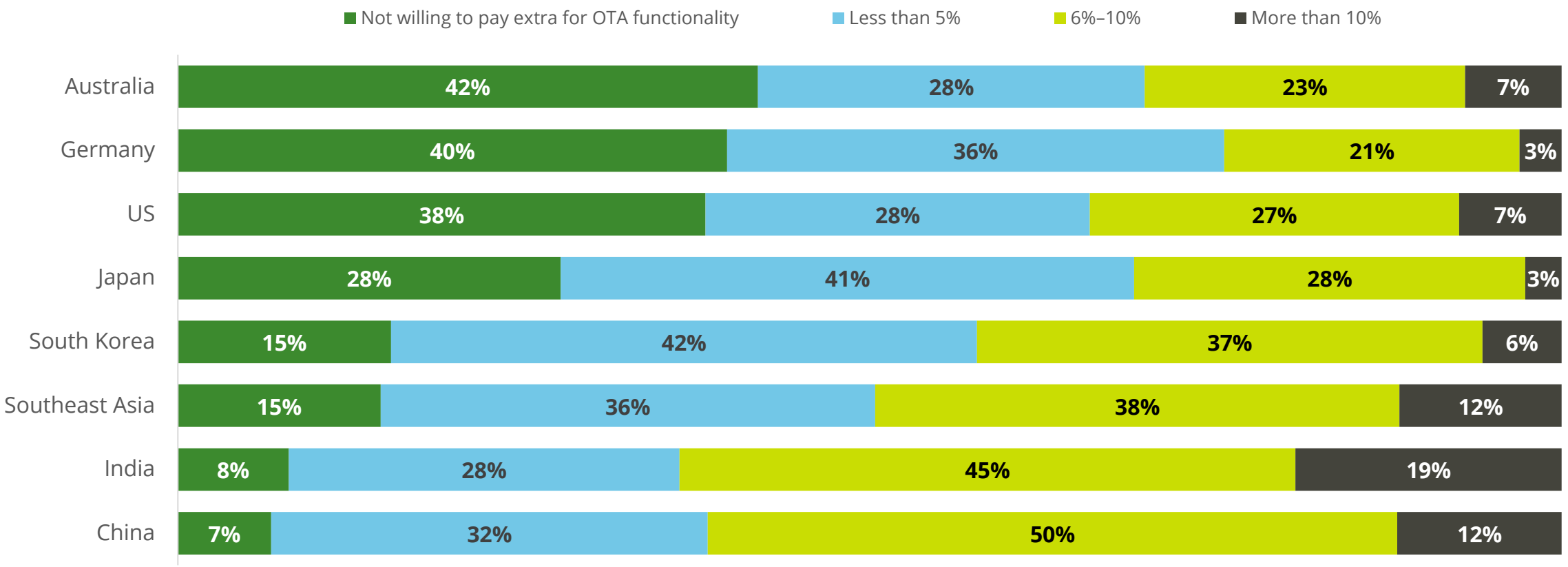
Note: "Not useful" is the sum of not at all useful, slightly useful, and somewhat useful while "useful" is the sum of useful, very useful, and extremely useful.

Q55. Software-defined vehicles allow customisation and feature expansion not only before purchase, but throughout the vehicle's life cycle. How useful do you find the idea of your next vehicle being primarily software-defined?

Sample size: n= 934 [Australia]; 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 944 [US]

Consumers in Australia are less inclined to pay extra for over-the-air (OTA) update capabilities, suggesting that OTA features may be viewed as expected; rather than something worth a premium.

Willingness to pay above vehicle list price for OTA-update capability



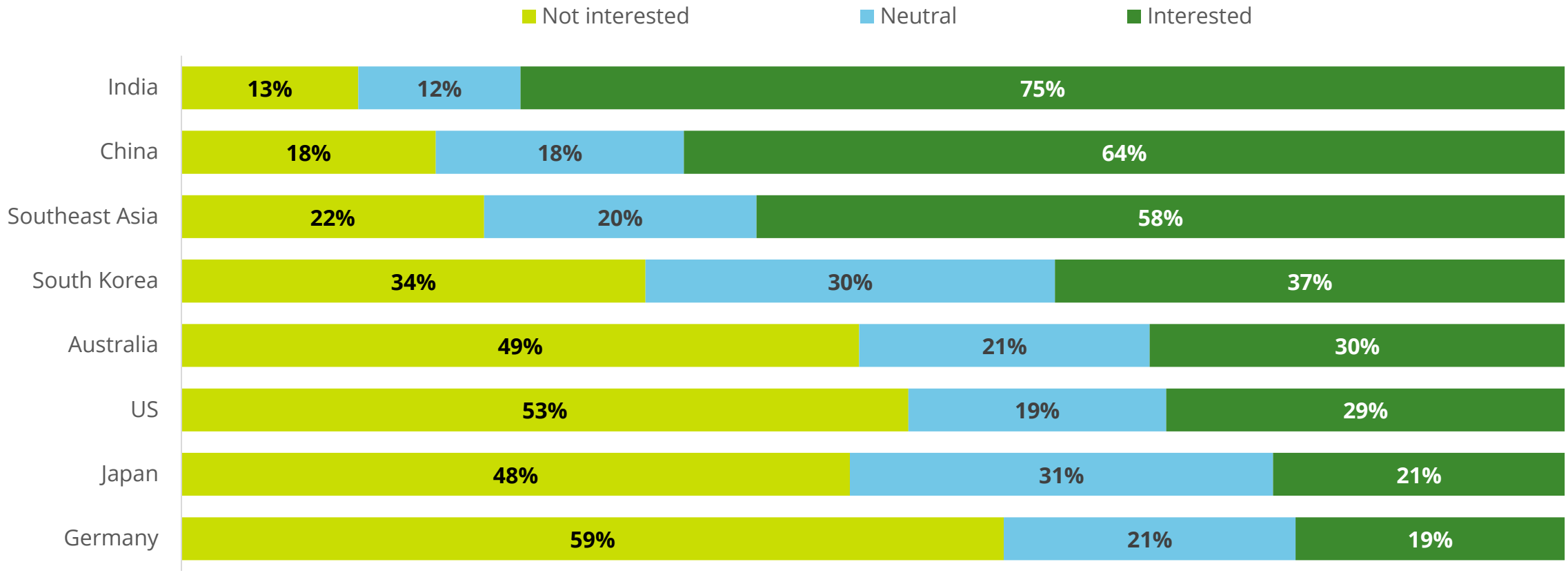
Note: Percentages may not add up to 100 due to rounding.

Q56. Over-the-air (OTA) software updates downloaded directly to a vehicle can eliminate the need for workshop visits. How much more would you be willing to pay for a vehicle that includes automated OTA updates versus a traditional vehicle requiring workshop visits? Please indicate the amount as a percentage above the vehicle's list price.

Sample size: n= 934 [Australia]; 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 944 [US]

Similarly, consumers in Australia are less interested in vehicle-based integrated services, suggesting varying levels of openness to expanding their vehicles' role within a broader service ecosystem.

Consumer interest in using vehicles as platforms for integrated services



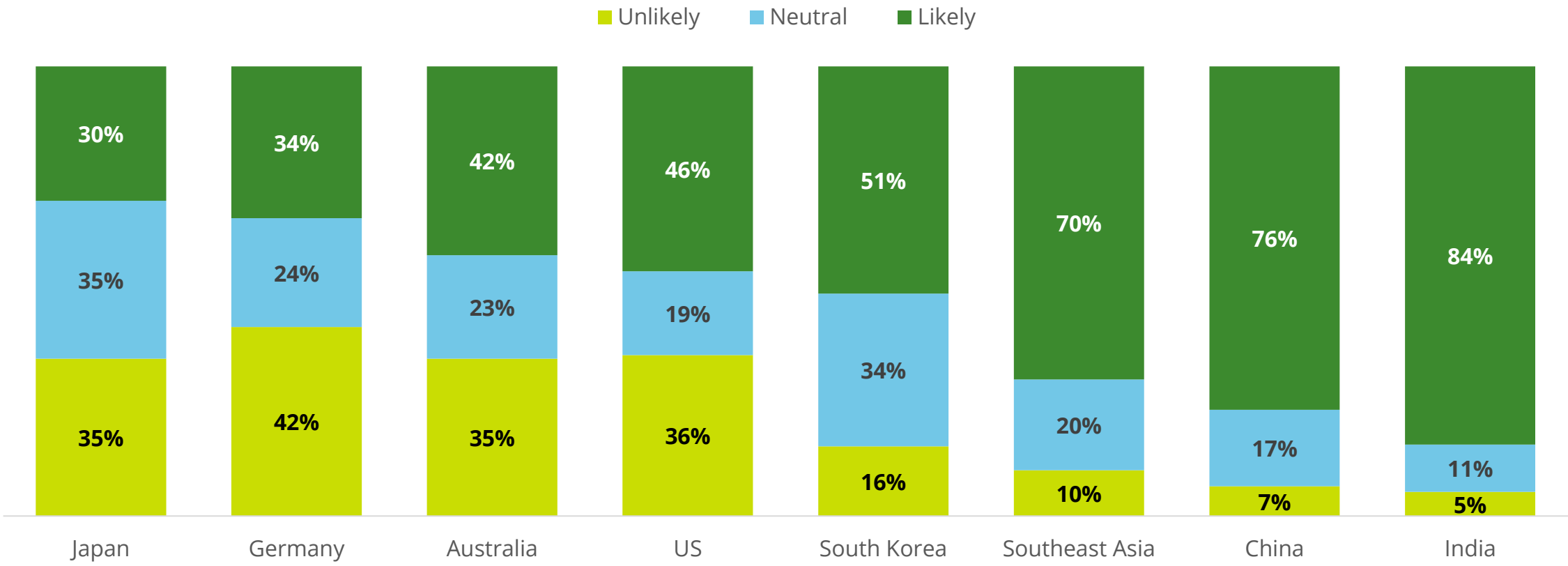
Note: Percentages may not add up to 100 due to rounding; "Not interested" is the sum of not at all interested, slightly interested, and somewhat interested, while "Interested" is the sum of interested, very interested, and extremely interested.

Q57. Software-defined vehicles can serve as platforms for services such as package delivery, grocery drop-off, valet parking, dynamic insurance pricing, or on-demand autonomous rides. How interested are you in using your vehicle to access such integrated services?

Sample size: n= 934 [Australia]; 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 944 [US]

Almost half of survey respondents have expressed their interest in utilising AI-enabled vehicle customisation features, suggesting a growing level of comfort with vehicles that can recognise user preferences and adapt without manual inputs to enhance convenience and personalisation.

Likelihood of using AI-enabled vehicle customisation features



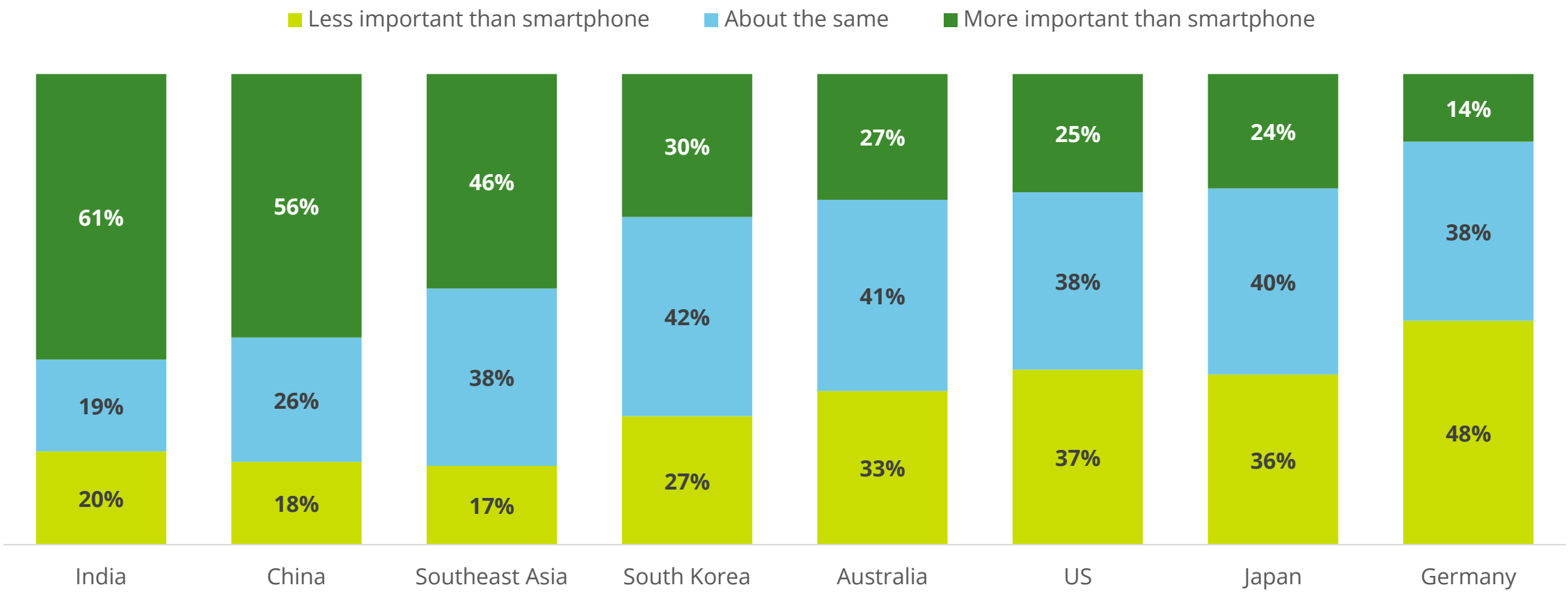
Note: Percentages may not add up to 100 due to rounding; "Unlikely" is the sum of very unlikely, unlikely, and slightly unlikely, while "Likely" is the sum of slightly likely, likely, and very likely.

Q60. AI-enabled customisation allows your vehicle to recognise and adapt to your preferences without manual input (e.g., adjusting climate settings, seat positions, cabin lighting). How likely would you be to use such AI-enabled features in your next vehicle?

Sample size: n= 934 [Australia]; 261 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 944 [US]

As features like driving assistance, comfort functions and third-party services continue to evolve — many Australians now value the importance of in-vehicle ecosystems almost as highly as their personal smartphones.

Perceived importance of in-vehicle ecosystems compared with smartphones



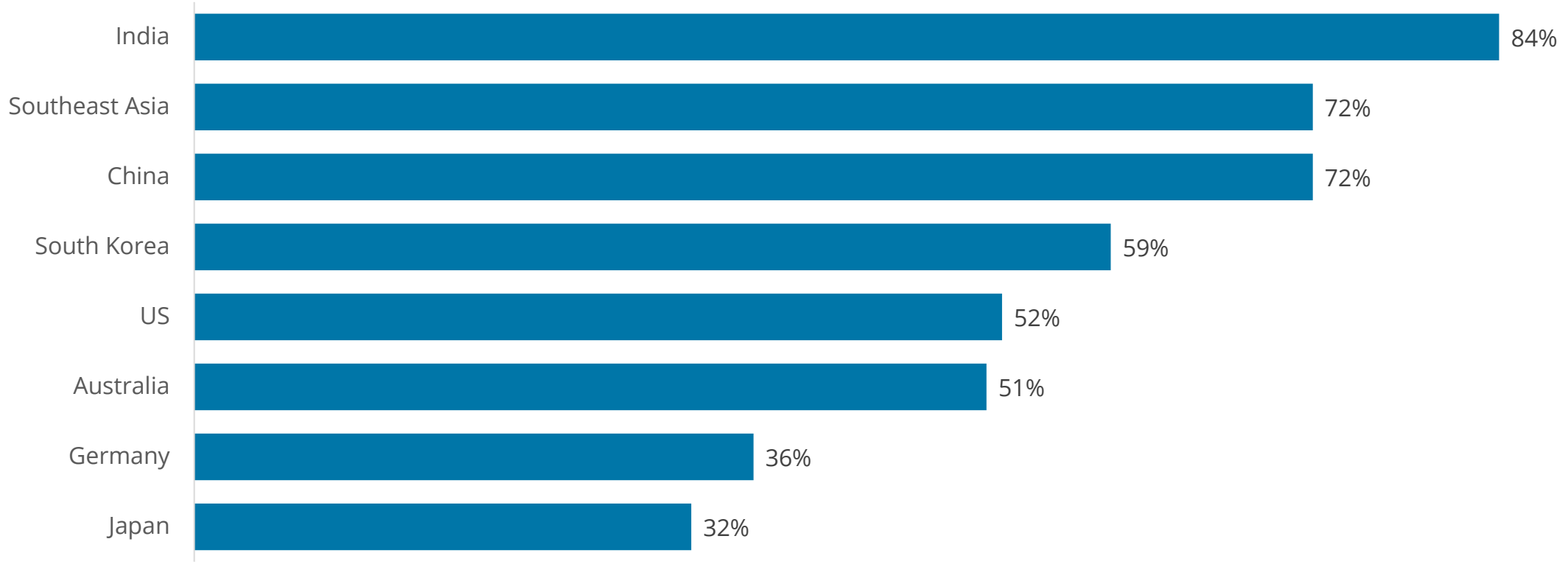
Note: Percentages may not add up to 100 due to rounding; "Less important" is the sum of much less important, less important, and slightly less important, while "more important" is the sum of slightly more important, more important, and much more important.

Q61. If an in-vehicle ecosystem offered features like advanced driving assistance, additional comfort functions, or integrated third-party services (e.g., insurance, repair shops), how would you compare its importance to that of your smartphone?

Sample size: n= 934 [Australia]; 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 944 [US]

Opinions are divided amongst Australian consumers on whether they are likely to keep their vehicle longer if it received regular OTA updates.

Likelihood of keeping a vehicle longer if regular OTA updates enhance the mobility experience



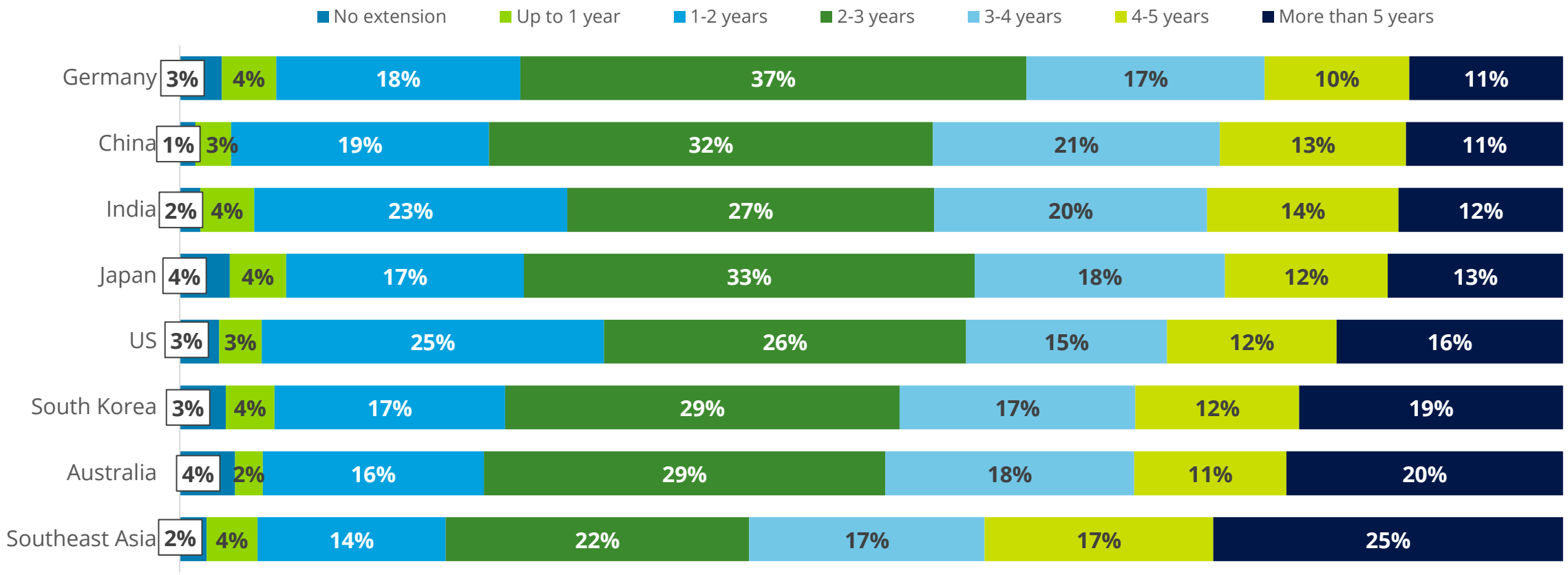
Note: Likelihood percentage is the sum of slightly likely, likely, and very likely.

Q62. How likely would you be to keep a vehicle longer if it received regular OTA updates to help enhance your mobility experience (e.g., new features, safety improvements, performance enhancements)?

Sample size: n= 934 [Australia]; 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 944 [US]

Of the 51%, a large portion have indicated they would keep their vehicle one to four years longer if it received regular OTA enhancements. This is an area of opportunity for OEMs to strengthen brand loyalty through frequent digital engagements whilst growing software-based revenue.

Number of additional years consumers would keep their vehicle with OTA enhancements



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

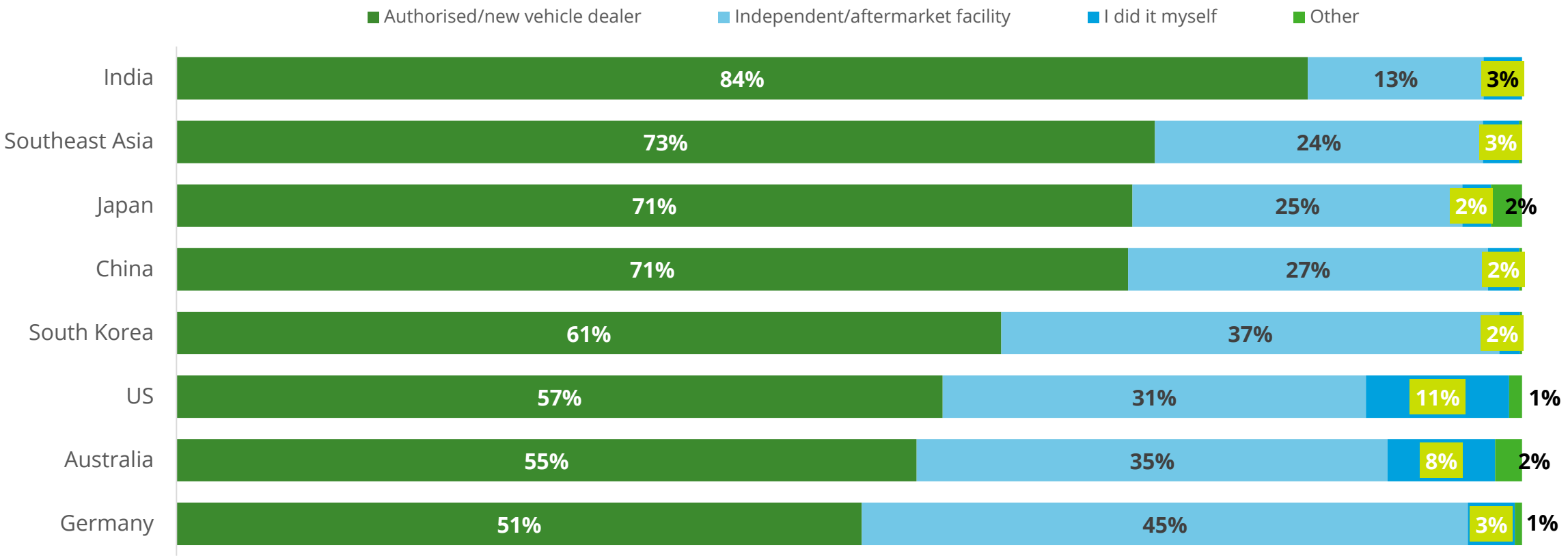
Q63. How many additional years would you expect to extend your ownership of the vehicle?

Sample size: n= 474 [Australia] ; 617 [China]; 459 [Germany]; 1,135 [India]; 221 [Japan]; 540 [South Korea]; 3,765 [Southeast Asia]; 489 [US]

5 Vehicle servicing

Authorised dealers continue to be the main choice for vehicle servicing; however, consumers in Australia continue to also leverage the services of aftermarket providers.

Most recent vehicle service experience by type of facility



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

Q16. Where was your most recent vehicle service experience?

Sample size: n= 830 [Australia] 905 [China]; 1,119 [Germany]; 1,048 [India]; 518 [Japan]; 646 [South Korea]; 3,870 [Southeast Asia]; 836 [US]

Surveyed consumers primarily choose vehicle service providers based on the quality of work performed, which can build trust and lead to increased loyalty and advocacy behaviours over time.

Most important reason for choosing a vehicle service provider

Reason to choose a service provider	Australia	China	Germany	India	Japan	South Korea	Southeast Asia	US
Cost	15%	9%	19%	5%	15%	10%	10%	14%
Trust	13%	17%	23%	23%	**36%**	25%	18%	19%
Convenience (e.g., location, hours)	12%	16%	5%	11%	11%	15%	12%	15%
Quality of work	**21%**	**20%**	**25%**	**26%**	20%	**28%**	**26%**	**20%**
Customer experience	9%	13%	8%	12%	3%	7%	9%	11%
Personal relationship with mechanic/technician	7%	5%	7%	7%	8%	6%	5%	6%
Warranty coverage	19%	14%	9%	11%	5%	6%	16%	13%
Complexity of work required	3%	7%	4%	5%	2%	2%	3%	2%

Note: Other % not shown.

Most commonly cited

Q17. What is the most important reason for your preferred choice of vehicle service provider?

Sample size: n= 743 [Australia]; 882 [China]; 1,074 [Germany]; 1,018 [India]; 495 [Japan]; 635 [South Korea]; 3,757 [Southeast Asia]; 739 [US]

Transparency around pricing and the work performed consistently ranks as the most important aspect of the vehicle service experience, highlighting consumers' strong desire for clear, fair, and well-explained servicing outcomes.

Most important aspect of a vehicle service experience

Important aspect of vehicle service experience	Australia	China	Germany	India	Japan	South Korea	Southeast Asia	US
Customer service/treatment	11%	**13%**	13%	12%	9%	10%	18%	15%
Communication while the vehicle is being serviced	5%	**13%**	4%	8%	3%	6%	5%	5%
Explanation of service work performed	8%	7%	8%	9%	16%	10%	11%	10%
Cost/price	22%	10%	**30%**	10%	13%	16%	13%	20%
Transparency of pricing and work performed	**28%**	**13%**	21%	**22%**	**41%**	**37%**	**27%**	**24%**
Convenient location	9%	6%	9%	6%	4%	8%	5%	7%
Availability of appointment	4%	6%	3%	5%	2%	3%	3%	4%
Online booking tool	2%	4%	1%	4%	1%	1%	1%	1%
Speed of service	5%	12%	7%	12%	5%	4%	8%	8%
Efficiency of check-in/check-out process	5%	11%	1%	8%	1%	4%	6%	4%
Access to temporary/loaner vehicle	2%	4%	2%	3%	3%	2%	3%	1%

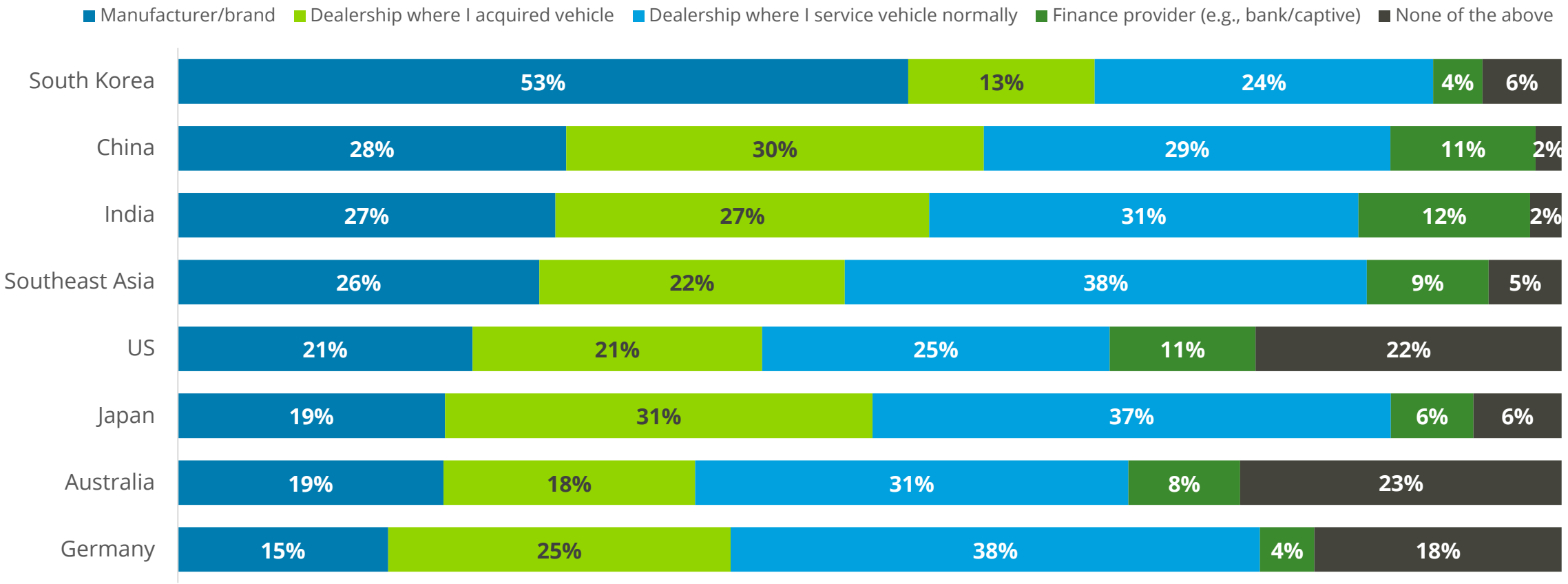
Q21. What is the most important aspect of a vehicle service experience?

Sample size: n= 743 [Australia]; 882 [China]; 1,074 [Germany]; 1,018 [India]; 495 [Japan]; 635 [South Korea]; 3,757 [Southeast Asia]; 739 [US]

Most commonly cited

Australian consumers place the highest trust in the dealership where they regularly service their vehicle, followed by the vehicle manufacturer. This emphasises the importance of positive ongoing service interactions to shape long-term customer relationships.

Who do vehicle owners most trust?



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

Q22. With whom do you have the most trusted relationship?

Sample size: n= 830 [Australia]; 905 [China]; 1,119 [Germany]; 1,048 [India]; 518 [Japan]; 646 [South Korea]; 3,870 [Southeast Asia]; 836 [US]

6 Study overview

About the study

The 2026 study includes 28,553 consumer responses from 27 countries.

Americas	Sample
Argentina (AR)	1,004
Brazil (BR)	1,000
Canada (CA)	1,001
Mexico (MX)	1,001
United States (US)	1,000

EMEA	Sample
Austria (AT)	1,000
Belgium (BE)	1,004
France (FR)	1,004
Germany (DE)	1,501
Italy (IT)	1,004
Netherlands (NL)	1,002
Saudi Arabia (SA)	1,001
Spain (ES)	1,003
Turkey (TR)	1,000
United Arab Emirates (AE)	1,006
United Kingdom (UK)	1,502

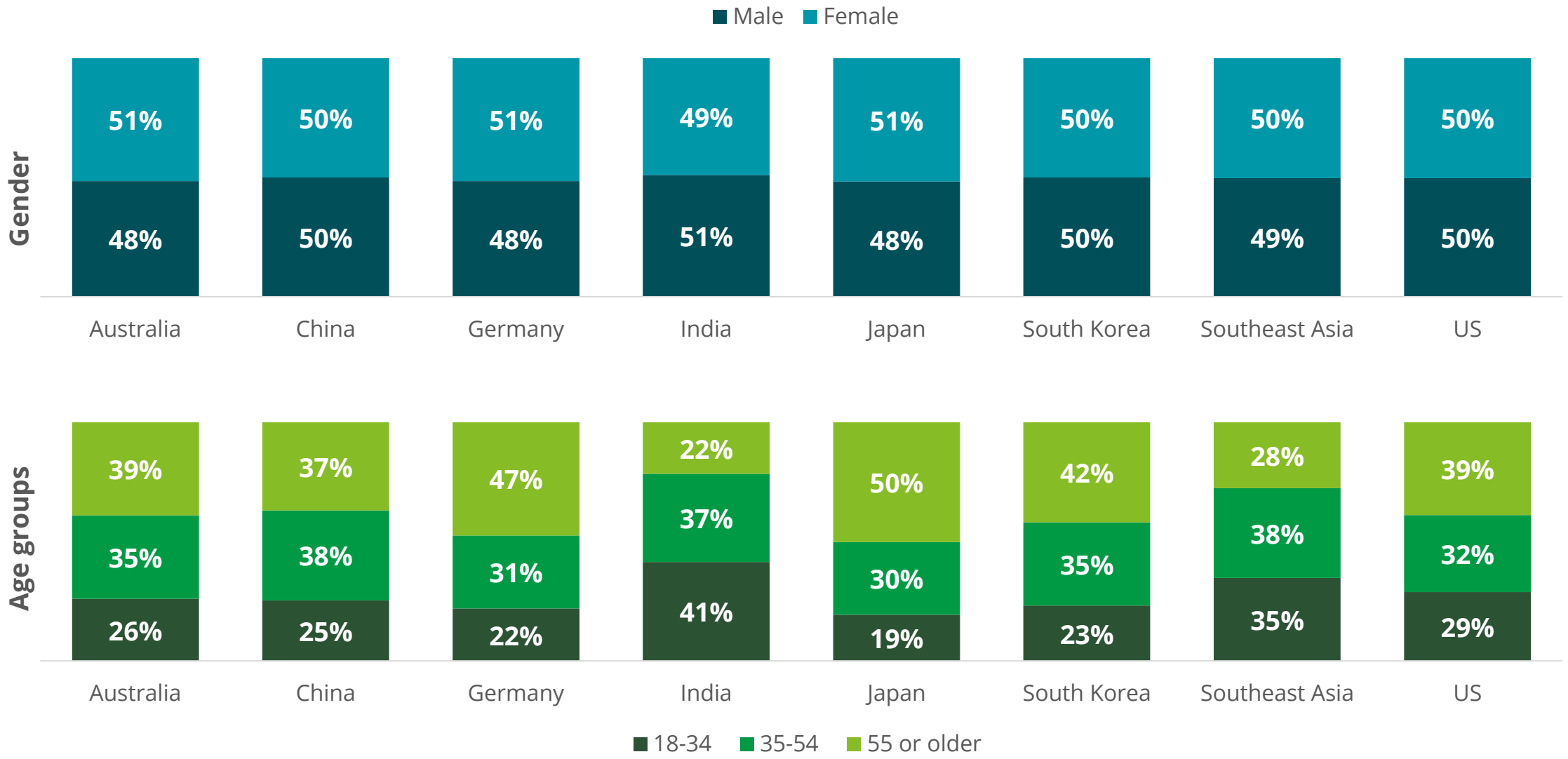
Asia-Pacific	Sample
Australia (AU)	1,002
China (CN)	1,000
India (IN)	1,501
Indonesia (ID) - SEA	1,004
Japan (JP)	1,004
Malaysia (MY) - SEA	1,002
Philippines (PH) - SEA	1,000
South Korea (KR)	1,000
Singapore (SG) - SEA	1,000
Thailand (TH) - SEA	1,007
Vietnam (VN) - SEA	1,000

Study methodology

The study was fielded from October through November 2025 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.

Study demographics



Note: Percentages may not add up 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= 1,002 [Australia]; 1,000 [China]; 1,501 [Germany]; 1,501 [India]; 1,004 [Japan]; 1,000 [South Korea]; 6,013 [Southeast Asia]; 1,000 [US]

Deloitte.

Australia Contacts

Dale McCauley
Automotive Leader
Deloitte Australia
dmccauley@deloitte.com.au

Lee Peters
Automotive Leader
Deloitte Australia
lepeters@deloitte.com.au

Acknowledgments

We would like to thank Lisa Walker, Harald Proff, Srinivasa Reddy Tummalapalli, Srinivas Oguri, Kelly Warner, Brooke Furman, and Meghan Gragtmans for their important contributions.