



2025 Global Automotive Consumer Study

Key Findings: Australian Market

February 2025

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Summary from the 2025 Global Automotive Consumer Study - Key Findings: Global Focus Markets:

The global automotive industry is undergoing a tremendous amount of change at an unprecedented pace. At the centre of this change sits a consumer with rapidly evolving expectations of the mobility experience. Brand loyalty is taking centre 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 impacting 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 favour 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.

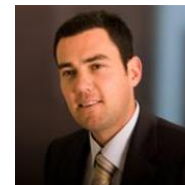
Manufacturers and suppliers are also facing operational headwinds as they struggle to reduce manufacturing cost and complexity. Some of these companies appear to be recognising they cannot maintain their competitive momentum alone, signalling a new era of 'co-opetition' to optimise limited resources for mutual benefit while lowering their risk exposure.

In addition, global trade tensions, tariffs, shifting regulatory policies, and labour 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 behaviours of over 30,000 consumers in 30 countries around the world.

We have focused this report on 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.



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Key findings

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.

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, signalling the need to build strong customer relationships, particularly in developing markets with a significant percentage of first-time buyers (e.g., China).

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.

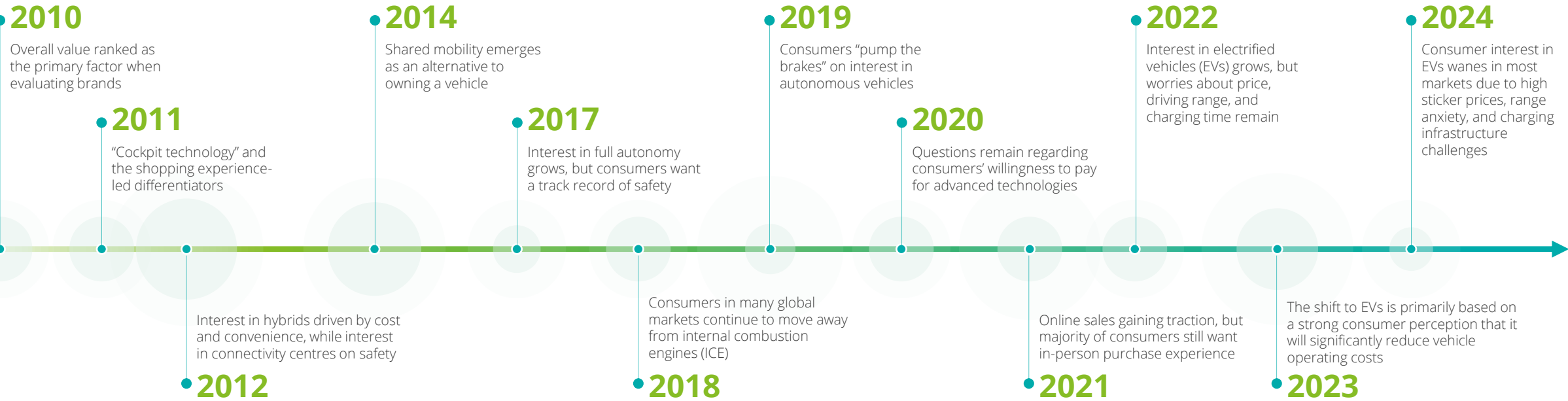
A relatively high frequency of vehicle use persists in many markets, but many younger consumers surveyed are interested in mobility-as-a-service (MaaS) over ownership

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 favour of a MaaS solution.



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:



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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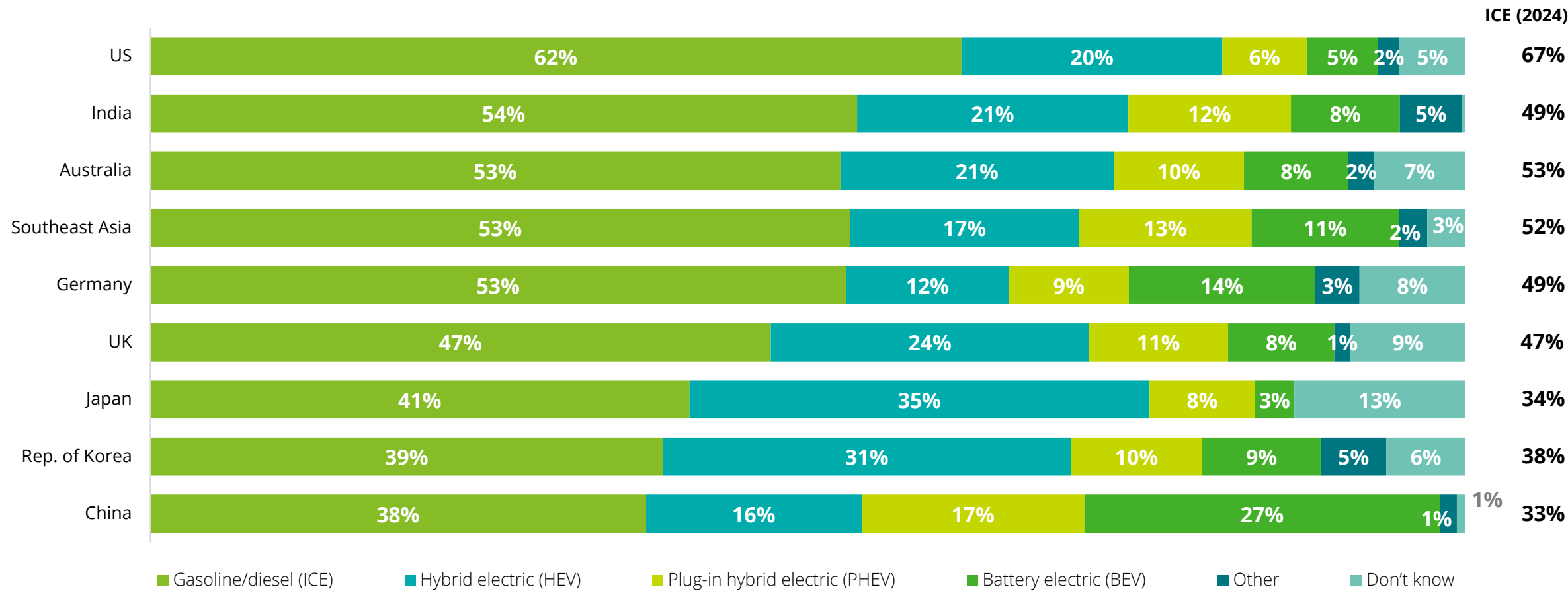
A close-up photograph of the front of a light blue electric vehicle. A black charging cable is plugged into a charging port located on the front grille. The grille features a prominent diamond-shaped mesh pattern. The car is parked outdoors, with a blurred background showing a parking lot and some greenery under a bright sky.

Vehicle electrification

01

Almost 50% of Australian consumers are considering a non-ICE alternative power train for their next vehicle, with the preference higher in some developed markets.

Frequency of driving personal 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]; 950 [Australia]

Some reasons surveyed for why 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	Australia	China	Germany	India	Japan	Rep. of Korea	Southeast Asia	UK	US
Lower fuel costs	62%	41%	52%	56%	61%	57%	64%	59%	56%
Concern for the environment	50%	43%	54%	63%	42%	43%	55%	51%	44%
Driving experience	36%	53%	32%	50%	34%	33%	51%	36%	36%
Government incentives / subsidies / stimulus programs	29%	40%	33%	45%	33%	35%	39%	23%	27%
Less maintenance	29%	29%	29%	45%	18%	38%	42%	24%	30%
Ability to use the vehicle as a backup battery / power source	24%	36%	22%	48%	28%	17%	40%	18%	25%
Potential for extra taxes/levies applied to internal combustion vehicles	19%	27%	19%	31%	12%	20%	26%	19%	18%
Potential ban on sale of new internal combustion vehicles	19%	18%	22%	30%	8%	12%	18%	28%	17%
Concern about personal health	18%	31%	18%	44%	12%	16%	39%	21%	20%
Peer pressure	4%	8%	5%	10%	5%	6%	9%	4%	3%

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

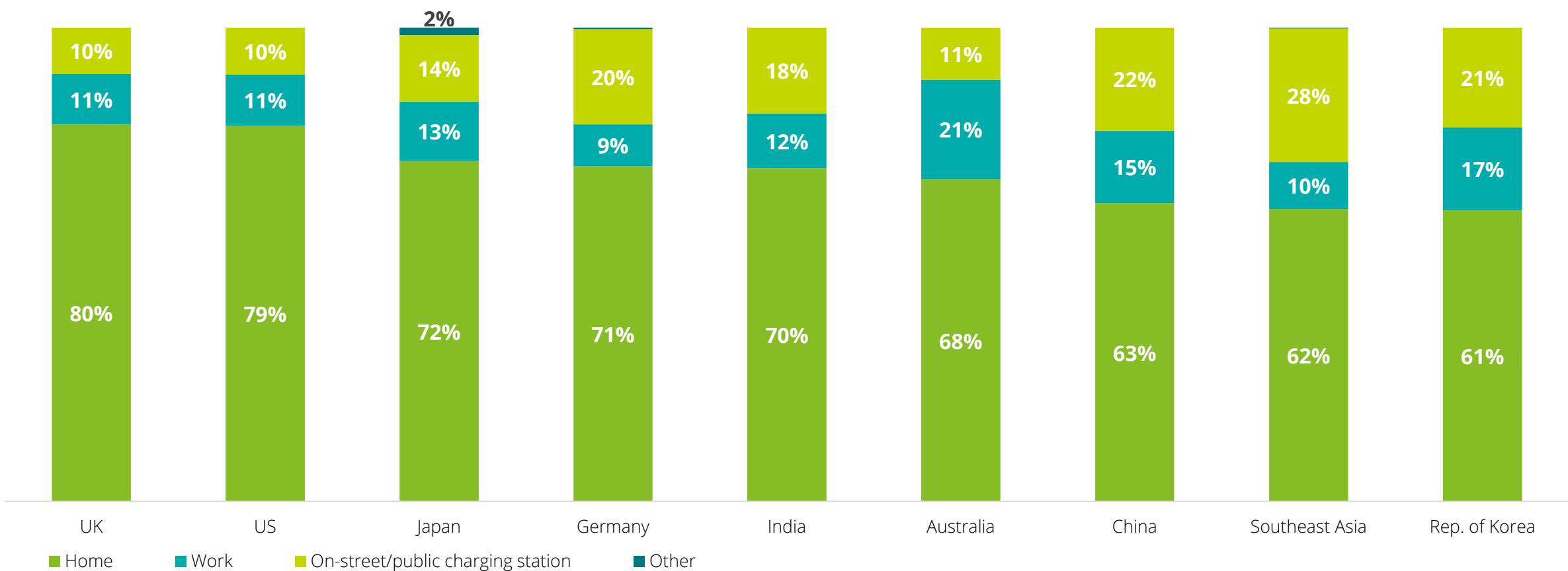
Q42. Which of the following factors have had the greatest impact on your decision to acquire an EV? Please select all that apply.

Sample size: n = 567 [China]; 466 [Germany]; 364 [India]; 285 [Japan]; 448 [Republic of Korea]; 2,097 [Southeast Asia]; 563 [UK]; 297 [US]; 1,064 [Australia]

Top reasons

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.

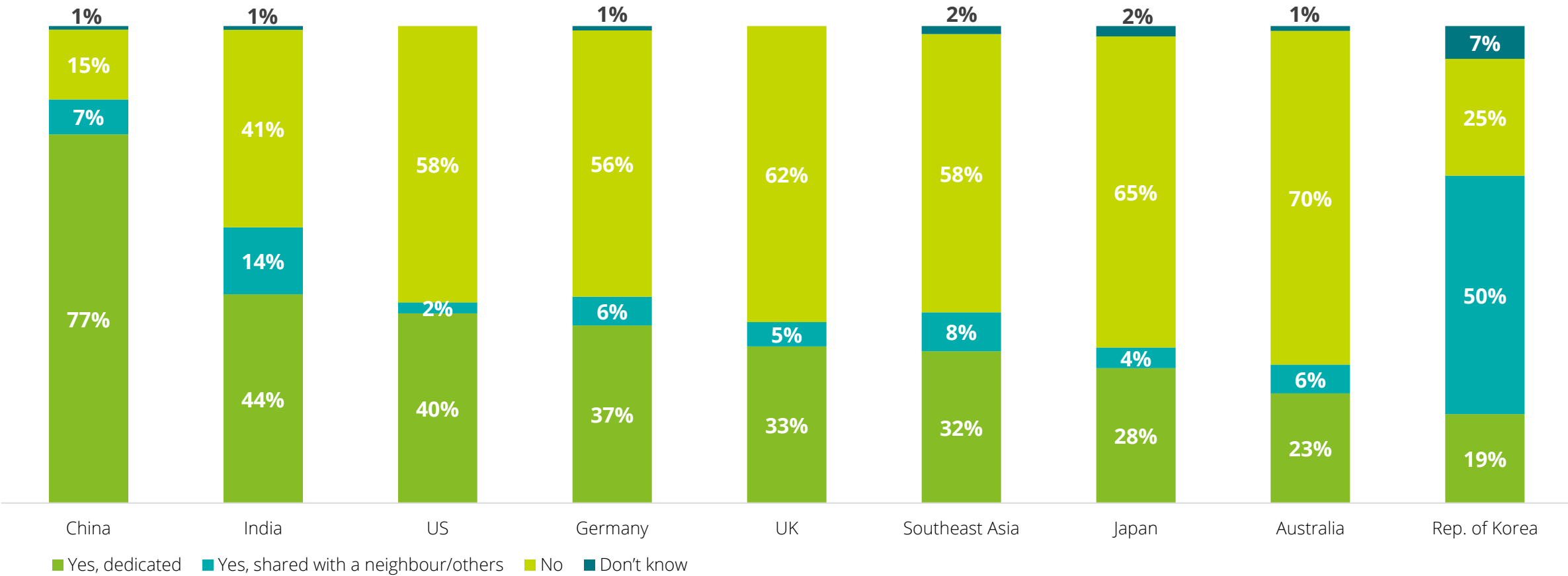
Expecting to charge electrified vehicle most often at...



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]; 165 [Australia]

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

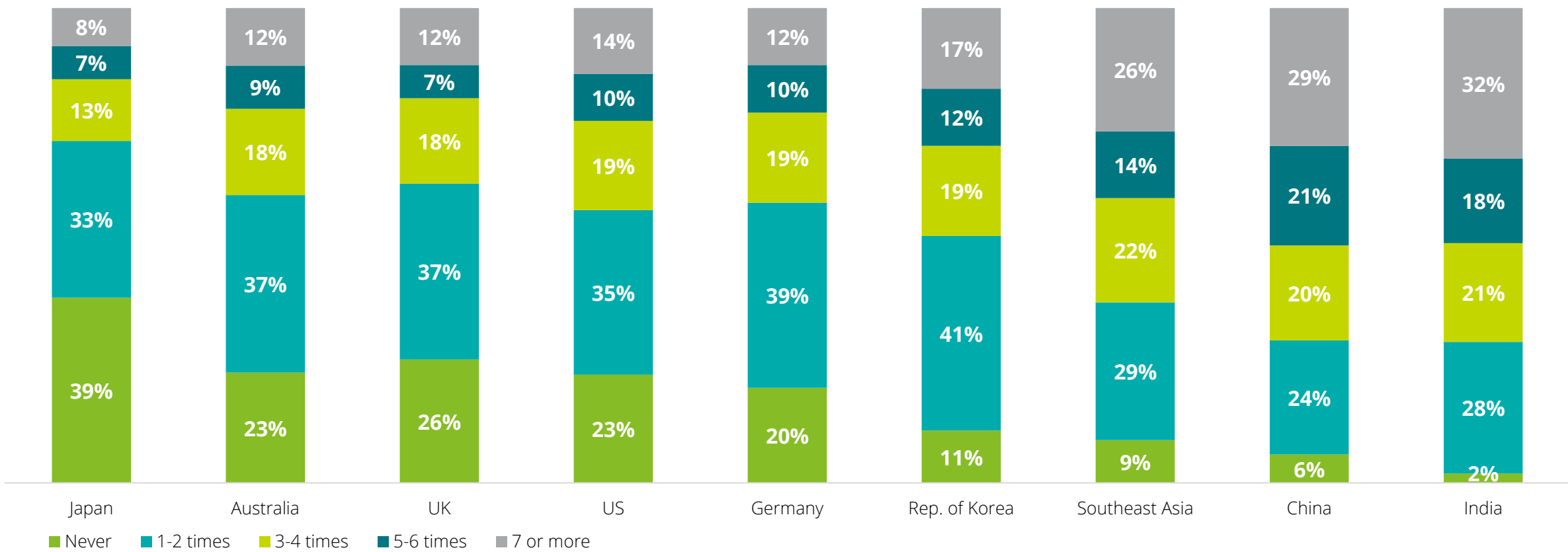
EV charger access among consumers who plan to charge their vehicle at home



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]; 112 [Australia]

Almost 80% of surveyed Australian consumers travel more than 100 kms per week, indicating a growing need for a charger at their residence.

How often did consumers drive more than 100 kms 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 100 kilometres 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]; 853 [Australia]

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	Australia	China	Germany	India	Japan	Rep. of Korea	Southeast Asia	UK	US
Dedicated EV charging station	38%	42%	32%	49%	30%	33%	33%	43%	44%
Traditional gas station with EV chargers	22%	10%	21%	23%	22%	17%	34%	15%	15%
Parking lot	20%	18%	6%	12%	19%	26%	12%	12%	13%
Retail outlet/mall	10%	5%	12%	2%	14%	5%	10%	10%	5%
Hotel	3%	3%	3%	3%	0%	1%	1%	4%	5%
Vehicle dealership	2%	7%	2%	6%	6%	4%	3%	4%	8%
On-street parking	2%	8%	17%	3%	2%	5%	4%	7%	4%
Community/public building	2%	8%	5%	3%	8%	10%	4%	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]; 165 [Australia]

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

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

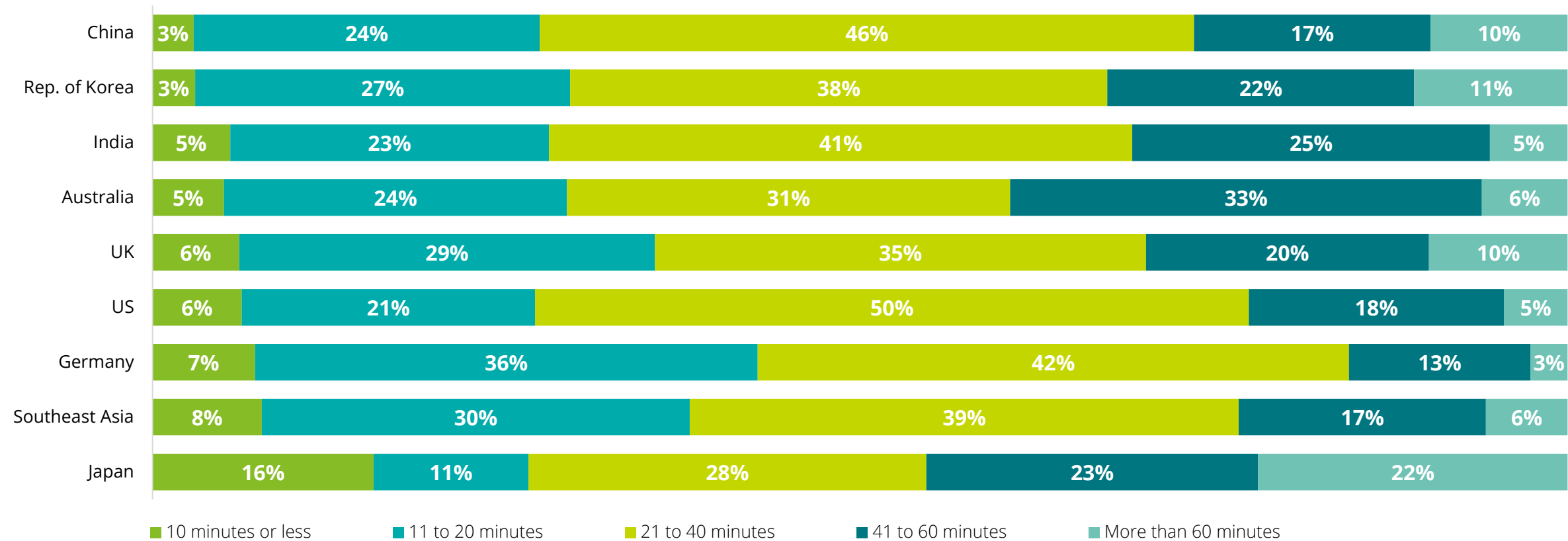
Q50: What is the most important aspect of an EV charging experience?

Sample size: n= 413 [China]; 304 [Germany]; 182 [India]; 64 [Japan]; 166 [Republic of Korea]; 1,223 [Southeast Asia]; 245 [UK]; 111 [US]; 165 [Australia]

 Most important

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]; 165 [Australia]

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

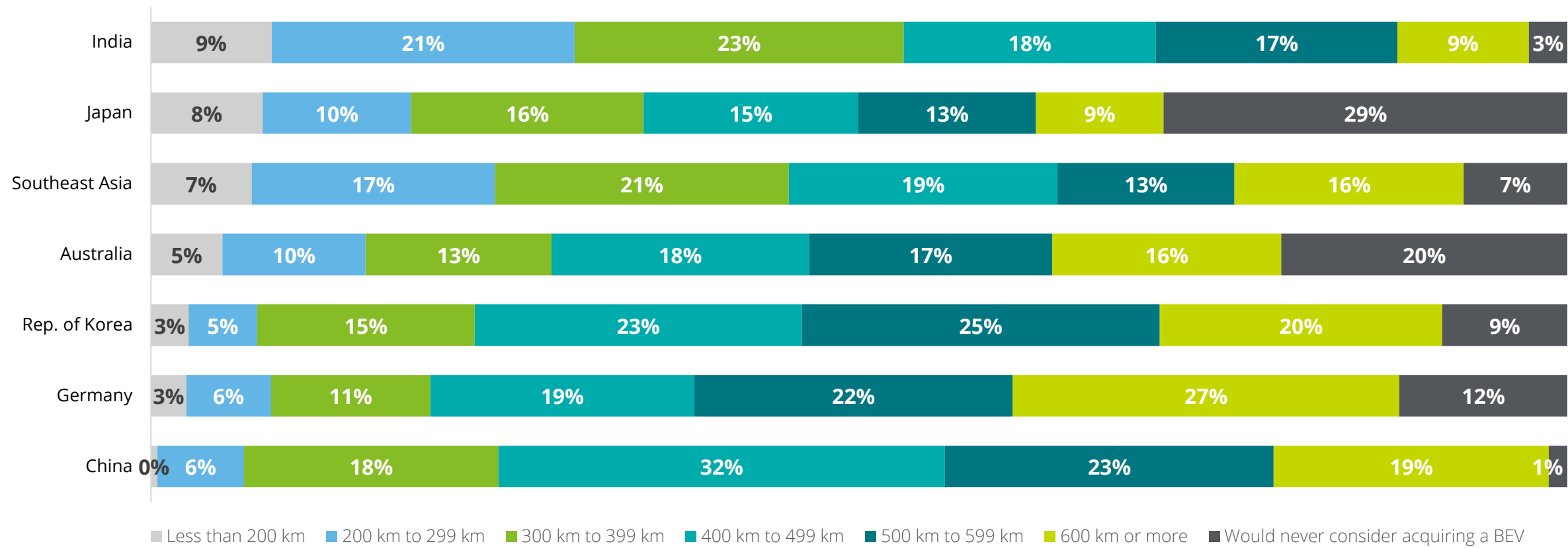
Payment methods	Australia	China	Germany	India	Japan	Rep. of Korea	Southeast Asia	UK	US
Credit/debit card	47%	8%	52%	45%	64%	60%	26%	52%	50%
Charging network app on your smartphone	26%	48%	29%	31%	16%	20%	47%	24%	28%
Third-party payment platform	9%	30%	8%	7%	9%	5%	9%	4%	3%
Pre-paid subscription plan	8%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

 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]; 165 [Australia]

Expectations for BEV driving range vary significantly by global market surveyed. More than half of surveyed consumers in Australia (51%) expect more than 400 kms of range from their BEV.

Consumer expectations on BEV driving range (in kilometres)



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]; 876 [Australia]

When it comes BEVs, surveyed consumers are generally most concerned about charging time, range anxiety, cost, and battery replacement.


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

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

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

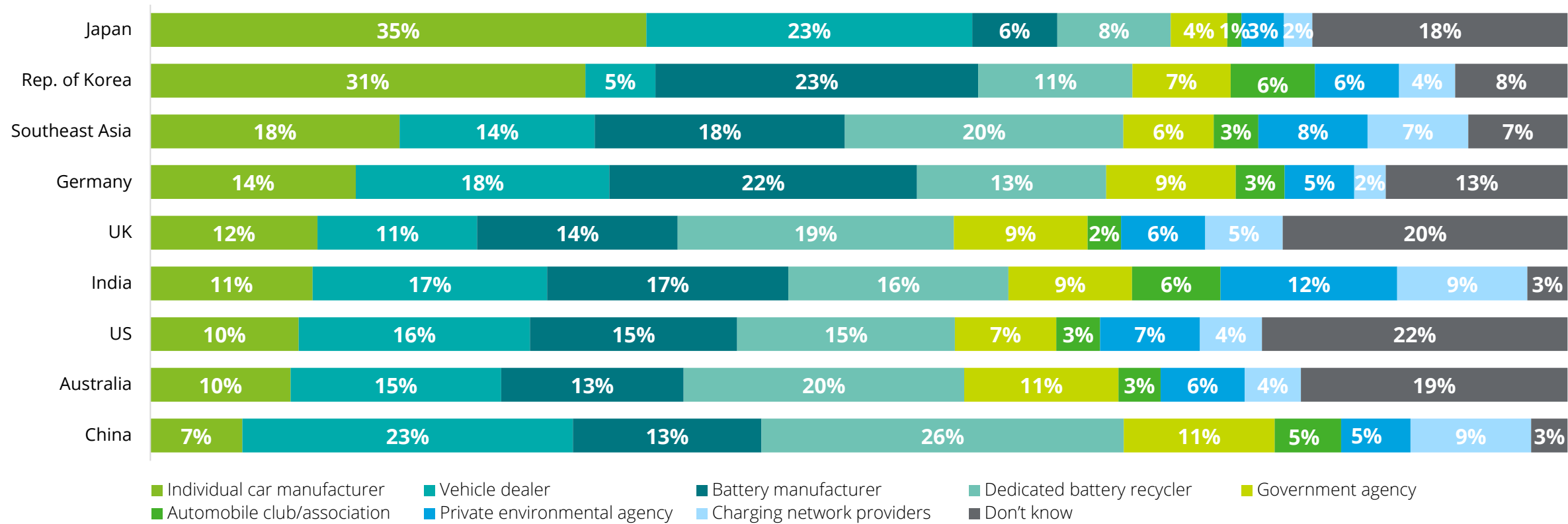
Q52: What are your biggest concerns regarding all battery-powered EVs? Please select all that apply.

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]; 4,468 [Australia]

 Most commonly cited

The end-of-life EV battery value chain within Australia remains somewhat non-existent even as the number of EVs on the road continues to increase¹ 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



¹IEA, 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]; 950 [Australia].

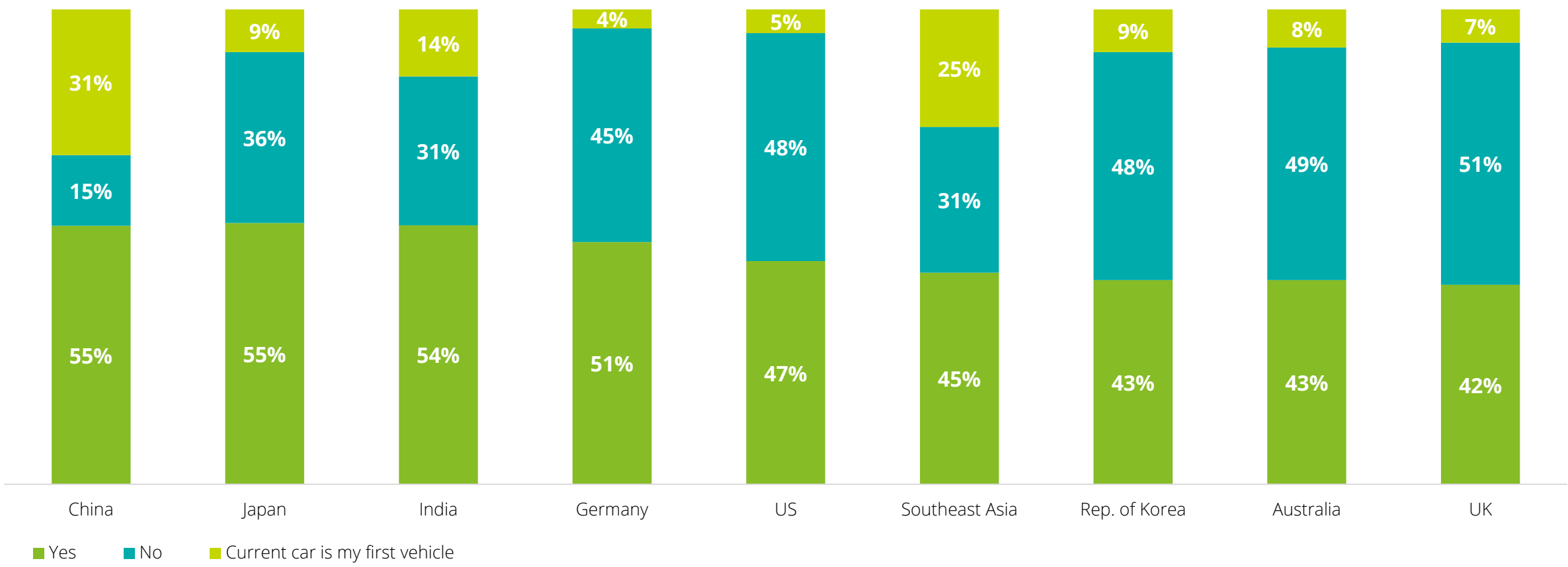
Future vehicle intentions

02



Almost half of Australian consumers surveyed are buying a different or new brand to their current car, highlighting the delicate nature of brand loyalty in the industry today.

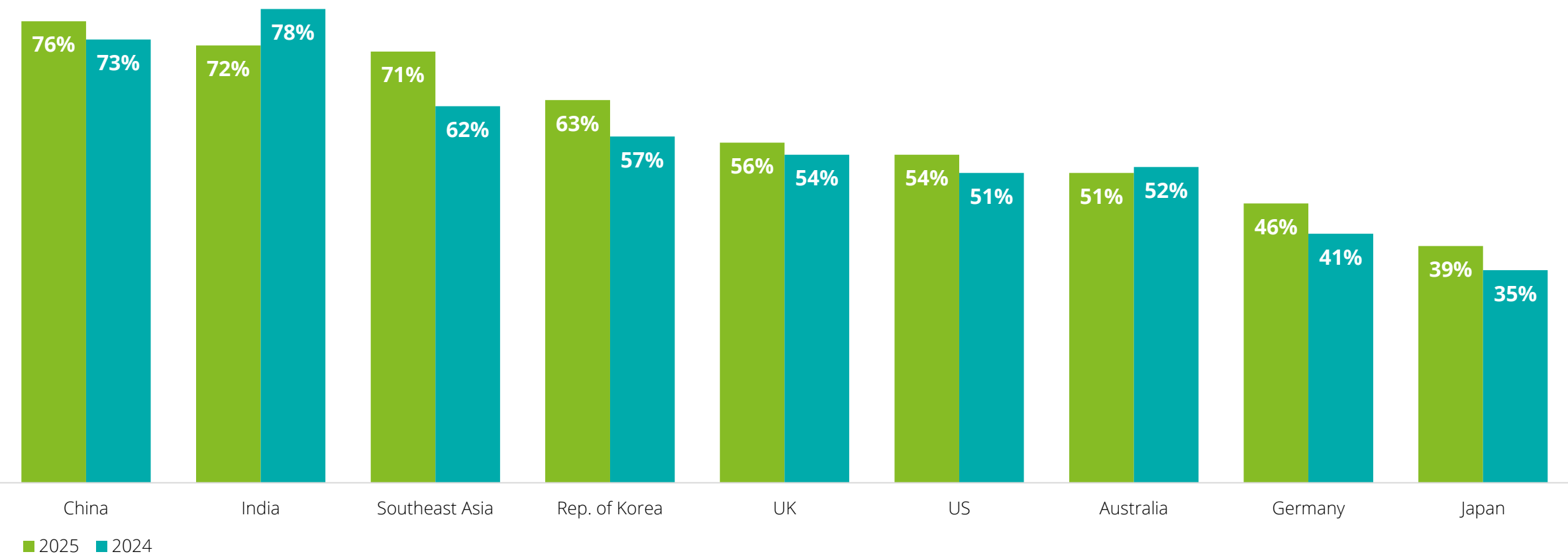
Percentage of consumers whose prior vehicle was from the same brand as current vehicle



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]; 853 [Australia]

Half of surveyed consumers in Australia have expressed their intent to switch to another brand of vehicle.

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]; 853 [Australia]

Quality is the most important factor for Australian’s when choosing their next vehicle, followed by price and performance.

Most important factors driving the choice of brand for next vehicle

Drivers of brand choice	Australia	China	Germany	India	Japan	Rep. of Korea	Southeast Asia	UK	US
Product quality	59%	50%	53%	62%	45%	51%	65%	62%	58%
Price	55%	25%	62%	43%	56%	45%	54%	62%	53%
Vehicle performance (e.g., fuel efficiency, battery range)	52%	47%	38%	59%	52%	59%	59%	57%	51%
Vehicle features	45%	35%	44%	55%	55%	29%	53%	49%	48%
Brand familiarity	33%	34%	41%	43%	21%	20%	32%	30%	32%
Quality of overall ownership experience	33%	31%	34%	43%	6%	25%	38%	34%	39%
Previous service experience	21%	19%	20%	22%	13%	15%	19%	20%	21%
Brand image	17%	38%	16%	46%	18%	25%	36%	18%	17%
Availability of battery electric vehicles/hybrid options	16%	31%	14%	37%	19%	23%	25%	18%	17%
Previous sales experience	10%	13%	28%	16%	7%	7%	14%	13%	15%
Brand advertising	7%	20%	6%	24%	5%	8%	13%	5%	10%
Brand affiliations (e.g., sponsorships, partners)	7%	16%	5%	23%	5%	6%	11%	5%	8%

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

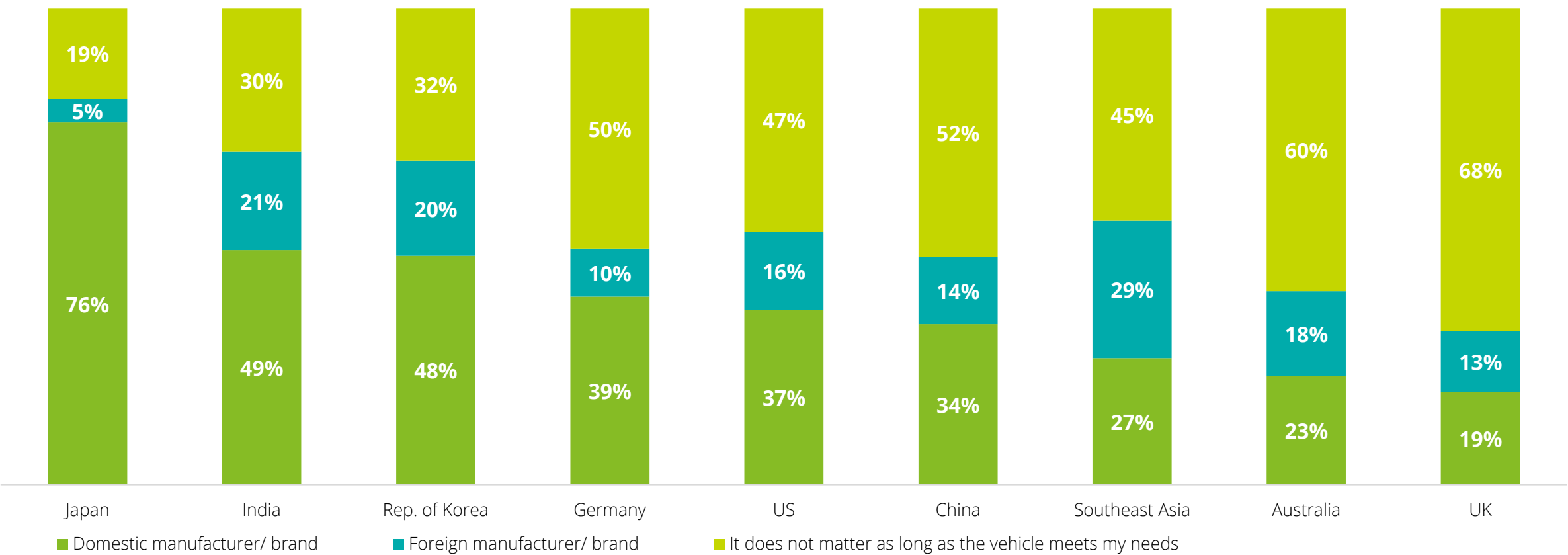
Q29. What are the most important factors driving the choice of brand for your next vehicle? Please select all that apply.

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]; 3,376 [Australia]

Most commonly cited

Australian consumers prefer vehicles that meet their needs – the country of origin or brand are unimportant, whereas brand affinity for domestic automakers is a preference in other markets.

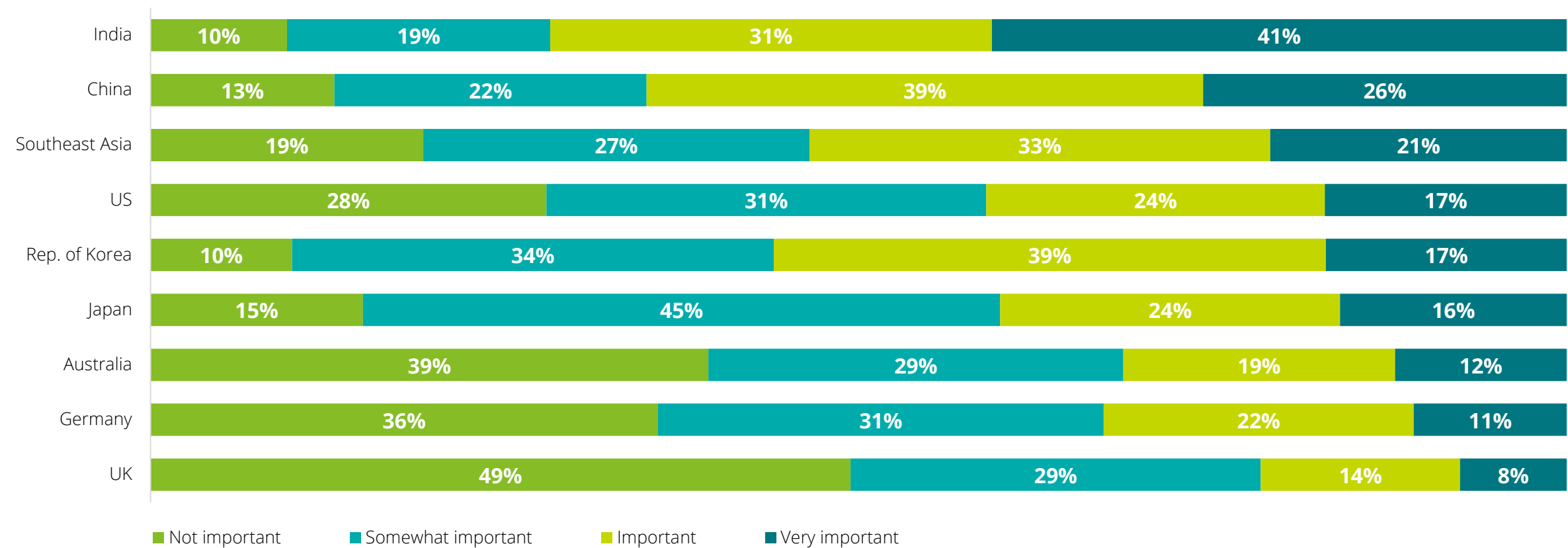
Preferred organisations for next vehicle purchase



Note: percentages may not add to 100 due to rounding.
Q54: From which of the following type of organisations 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]; 950 [Australia]

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

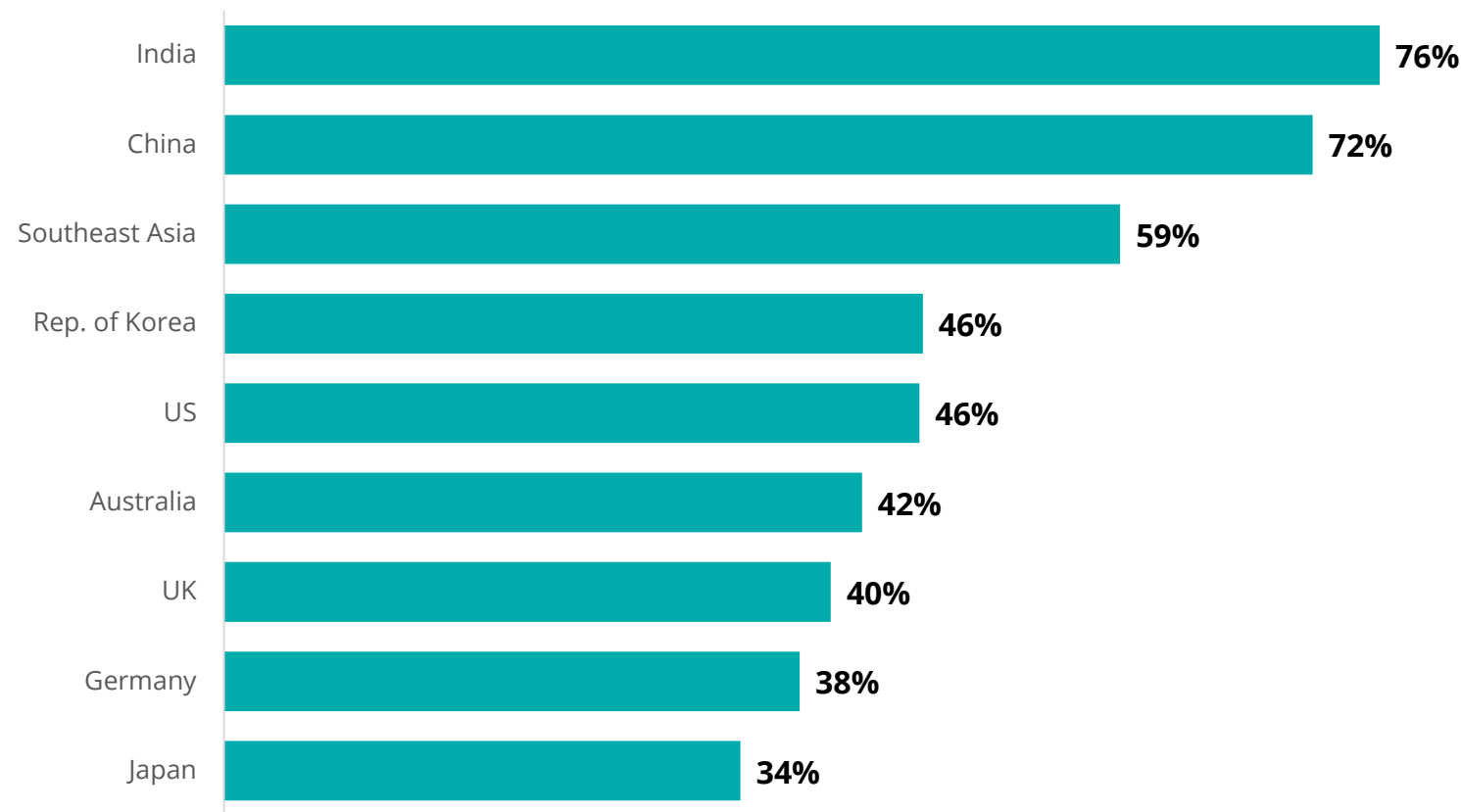
Importance of next vehicle to be manufactured locally



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]; 950 [Australia]

As some OEMs continue to explore the potential for ‘alternative purchasing and distribution’ models, surveyed consumers in Australia are less receptive to the concept of buying a vehicle directly from the manufacturer when compared to other markets.

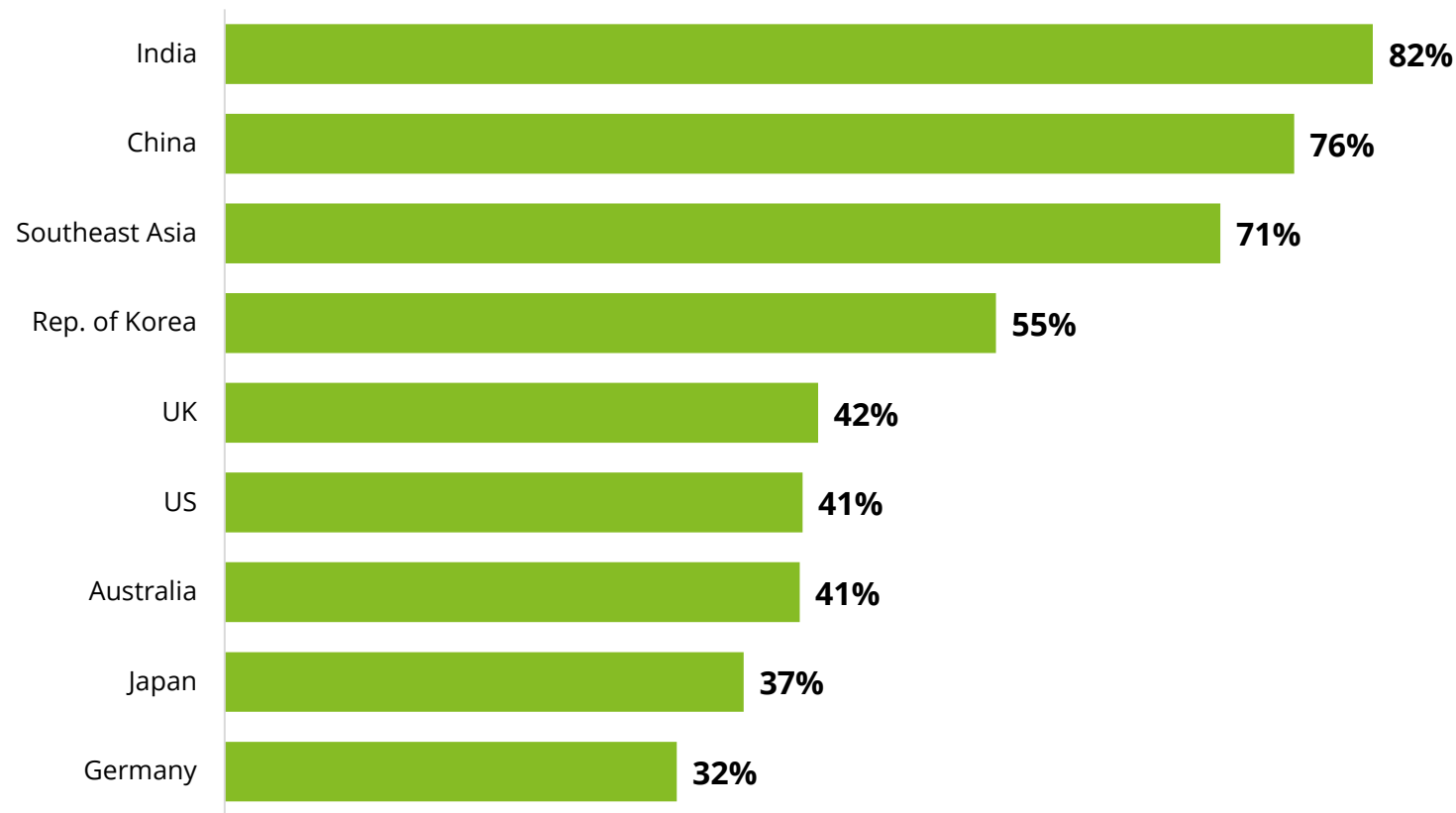
Percentage of surveyed consumers who would be interested in acquiring a **vehicle directly from the manufacturer**



Q61: To what extent are you interested in acquiring your next vehicle directly from the manufacturer (via an online process)?
Sample size: 939 [China]; 1,306 [Germany]; 882 [India]; 637 [Japan]; 906 [Republic of Korea]; 5,028 [Southeast Asia]; 1,314 [UK]; 937 [US]; 950 [Australia]

Consumers in some markets are signalling a high level of interest in purchasing vehicle insurance directly from the manufacturer.

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



Q60: The next time you acquire a vehicle, how interested would you be in purchasing insurance directly from the vehicle manufacturer?
Sample size: 939 [China]; 1,306 [Germany]; 882 [India]; 637 [Japan]; 906 [Republic of Korea]; 5,028 [Southeast Asia]; 1,314 [UK]; 937 [US]; 950 [Australia]

However, it may be difficult to move to an entirely online purchase process in many markets, including Australia, 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	Australia	China	Germany	India	Japan	Rep. of Korea	Southeast Asia	UK	US
I need to physically interact with the vehicle before I buy it	88%	88%	80%	92%	81%	70%	91%	84%	86%
I have to test drive the vehicle to make sure it's right for me	86%	86%	80%	92%	72%	74%	90%	84%	86%
I want to negotiate in-person to get the best deal	84%	85%	74%	89%	75%	73%	89%	80%	76%
I want to interact with real people	83%	85%	81%	90%	73%	67%	88%	83%	80%
I want to build a relationship with a dealer for future service	57%	85%	57%	89%	64%	59%	80%	57%	63%
I prefer to limit the need to visit a dealership in person	46%	41%	33%	73%	23%	36%	55%	35%	49%

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]; 5,700 [Australia]

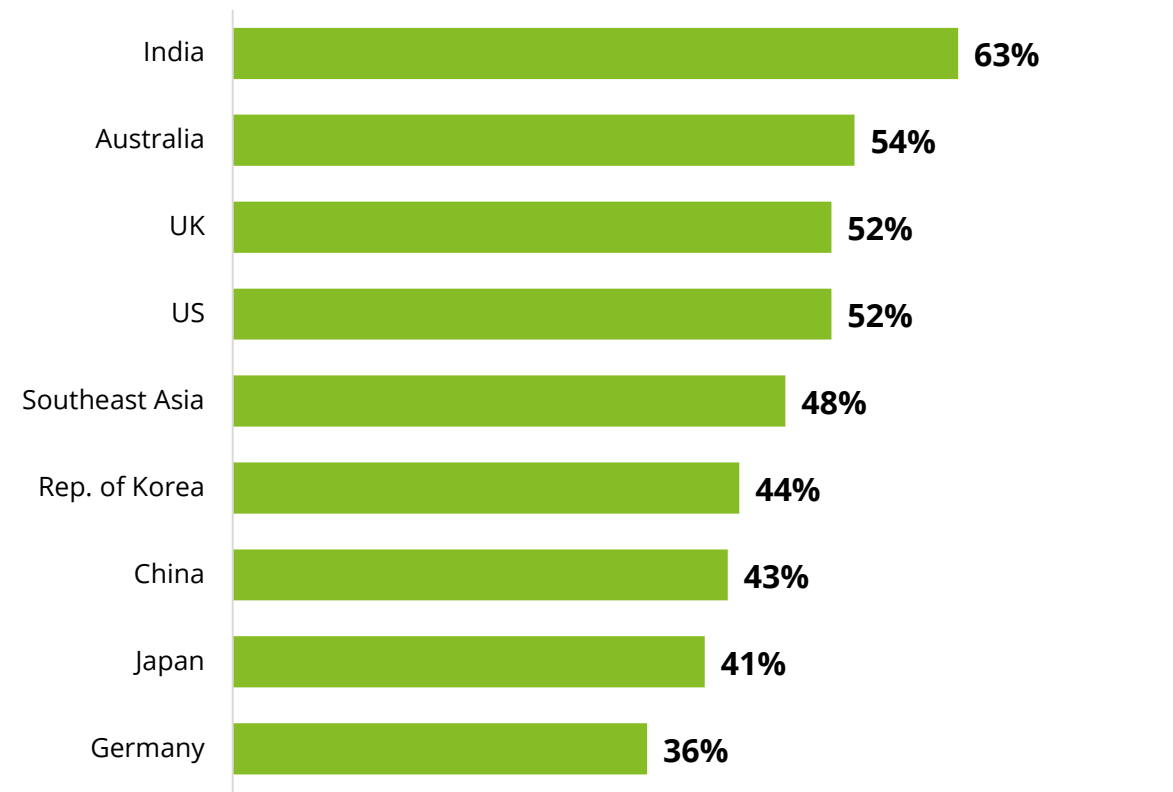
Connectivity

03

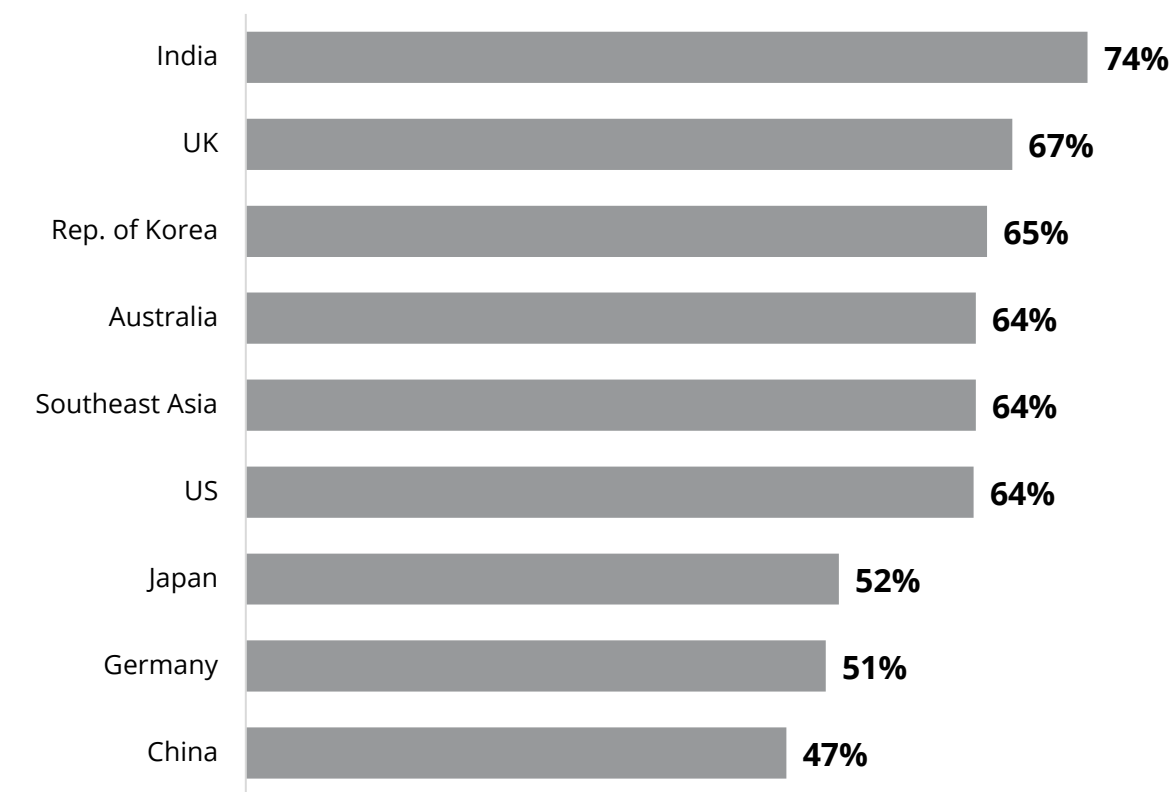


Consumers surveyed in Australia have raised concerns with the idea of an autonomous vehicle fleet when compared to those in Germany, Japan, or China.

Percentage of consumers concerned about **fully autonomous robo-taxi services** operating where they live



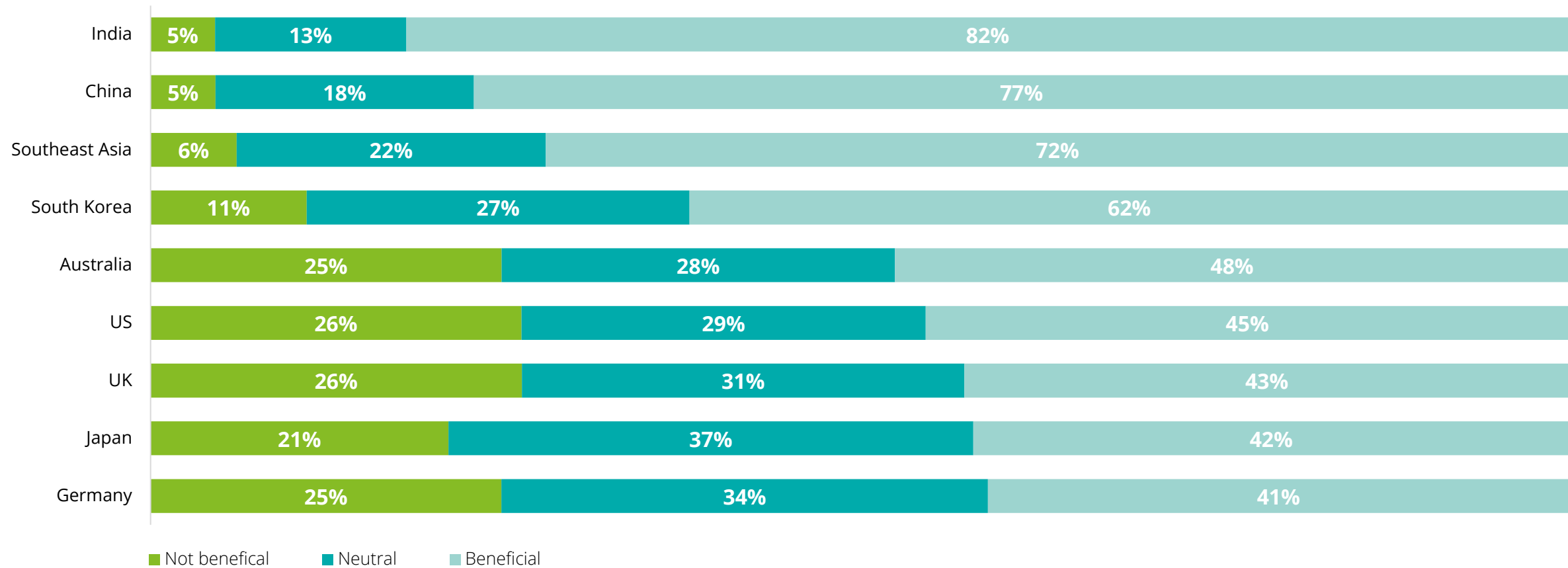
Percentage of consumers concerned about **commercial vehicles operating in a fully autonomous mode** on the highway



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]; 950 [Australia]

Almost half of surveyed Australian consumers see artificial intelligence (AI) as beneficial, and only a quarter perceive no benefits with the addition.

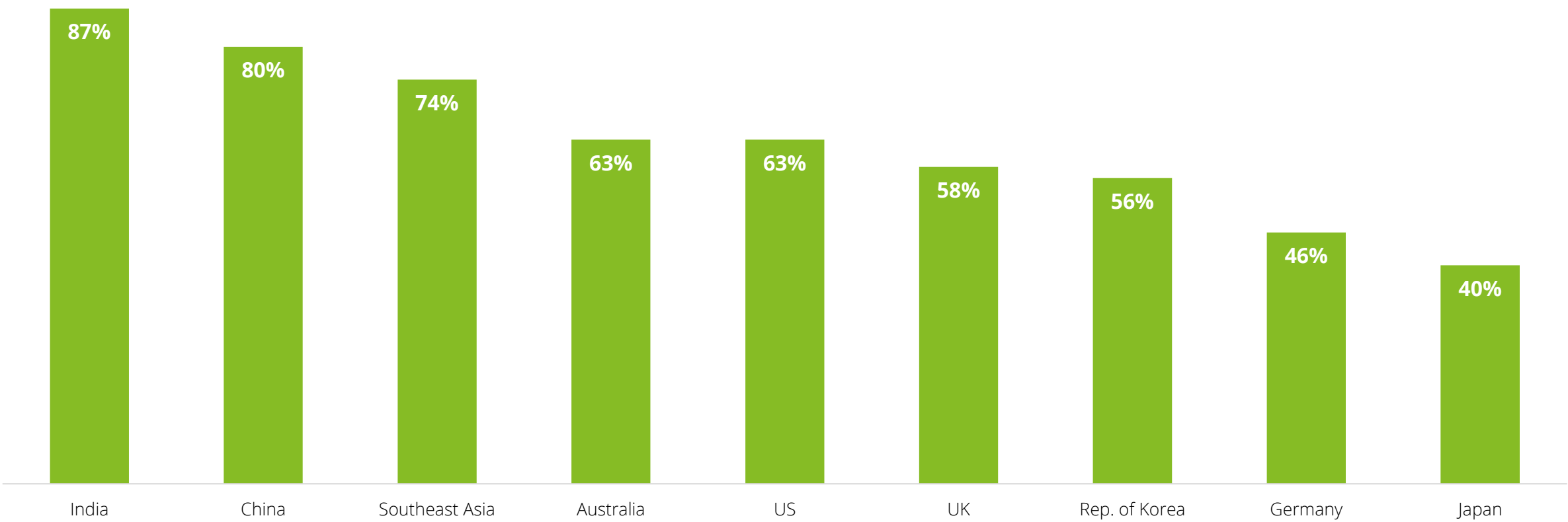
Addition of artificial intelligence in vehicle systems



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]; 950 [Australia]

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]; 950 [Australia]

Though it could mean sharing PII* with manufacturers or other third parties, Australian consumers have expressed interest in paying for connected vehicle features.


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

Connected vehicle services	Australia	China	Germany	India	Japan	Rep. of Korea	Southeast Asia	UK	US
Anti-theft tracking	63%	77%	50%	88%	49%	66%	82%	65%	60%
Emergency assistance (e.g., collision detection)	62%	78%	48%	86%	50%	71%	82%	58%	62%
Automatic detection of vehicles and pedestrians	55%	75%	47%	81%	49%	71%	73%	50%	60%
Optimised vehicle insurance plan based on your driving habits	53%	73%	34%	83%	36%	53%	71%	47%	52%
Warranty/recall notices	48%	70%	37%	83%	31%	60%	69%	46%	51%
Vehicle health reporting and maintenance cost forecasts	48%	73%	34%	83%	29%	57%	73%	49%	48%
App connectivity	43%	68%	30%	81%	23%	51%	69%	39%	47%
Infotainment functions (e.g., navigation, video streaming)	43%	65%	38%	79%	35%	56%	63%	44%	49%
Digital key	43%	67%	31%	80%	32%	56%	66%	36%	45%
Autonomous/remote parking	41%	70%	30%	78%	32%	54%	64%	38%	37%

*PII: Personal identifiable information

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]; 9,500 [Australia]

 Most commonly cited

Over a quarter of consumers surveyed in Australia do not trust any of the listed entities, which could represent a challenge for companies looking to monetise connected services.

Most trusted entity for managing vehicle data

Most trusted entity	Australia	China	Germany	India	Japan	Rep. of Korea	Southeast Asia	UK	US
None of the above	30%	4%	26%	3%	17%	9%	11%	30%	31%
Car manufacturer	20%	25%	22%	28%	30%	40%	30%	23%	19%
Vehicle dealer	15%	17%	17%	16%	30%	6%	17%	13%	16%
Government agency	11%	20%	10%	12%	3%	12%	11%	7%	4%
Insurance company	7%	7%	7%	10%	12%	4%	12%	10%	9%
Automobile club or association	5%	6%	7%	5%	1%	4%	3%	4%	4%
Cellular service provider	5%	6%	4%	7%	3%	12%	6%	4%	8%
Cloud service provider	4%	8%	3%	8%	3%	9%	7%	6%	6%
Financial service provider	3%	7%	4%	11%	1%	5%	4%	4%	3%

 Most commonly cited

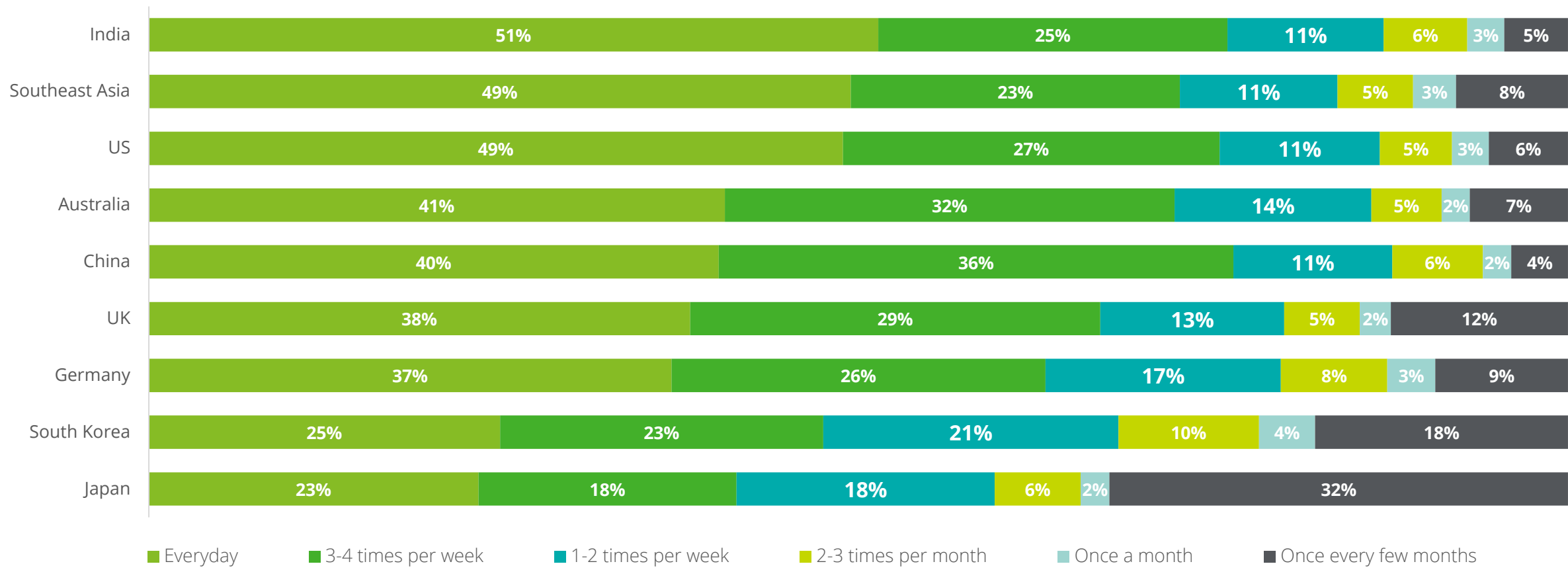
Note: Percentages may not add up to 100 due to rounding.
Q59. Who do you trust most to access and manage the data your vehicle generates?
Sample size: n= 939 [China]; 1,306 [Germany]; 882 [India]; 637 [Japan]; 906 [Republic of Korea]; 5,028 [Southeast Asia]; 1,314 [UK]; 937 [US]; 950 [Australia]

Mobility as a Service (MaaS)

04

More than 70% of surveyed consumers in Australia drive their personal vehicle more than 3-4 times per week, highlighting the importance of personal vehicle ownership and use.

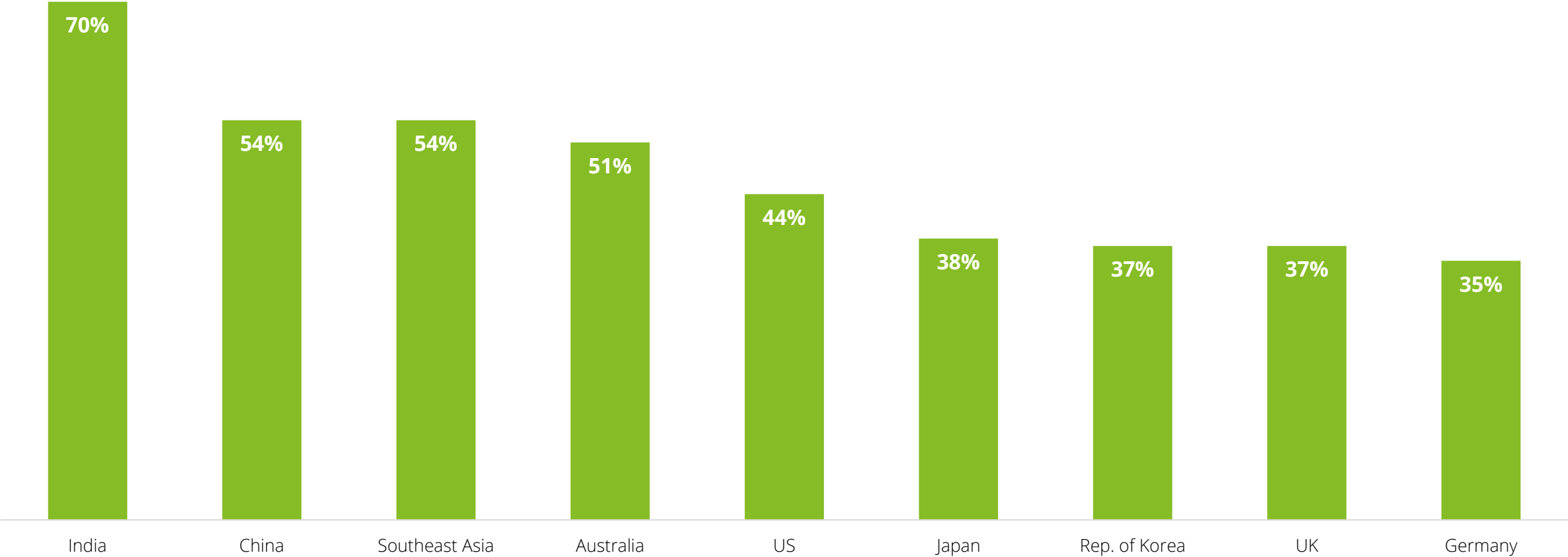
Frequency of driving personal vehicle



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]; 1,022 [Australia]

In Australia, 50% of young consumers say they would be willing to give up vehicle ownership in favour of a mobility-as-a-service (MaaS)* solution.

Willingness to give up vehicle ownership in favour of mobility-as-a-service (% somewhat willing/willing/very willing) – 18 to 34-year-old respondents



***MaaS:** a type of service that enables users to plan, book, and pay for multiple types of mobility services through an integrated platform
Q63: To what extent would you be willing to give up vehicle ownership in favour 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]; 1,022 [Australia]

Whilst many Australian consumers are willing to give up vehicle ownership to explore MaaS, we have one of the highest rates of 100% private vehicle use in the world.

Percentage of mobility needs **currently addressed** by private vehicle vs. mobility-as-a-service (MaaS)

Mix of transportation type	Australia	China	Germany	India	Japan	Rep. of Korea	Southeast Asia	UK	US
100% Private vehicle – 0% MaaS	45%	10%	40%	13%	35%	17%	22%	43%	50%
90% Private vehicle – 10% MaaS	9%	14%	8%	10%	8%	10%	12%	8%	6%
80% Private vehicle - 20% MaaS	8%	16%	9%	15%	9%	11%	14%	6%	5%
70% Private vehicle - 30% MaaS	8%	20%	6%	13%	6%	12%	12%	5%	6%
60% Private vehicle - 40% MaaS	7%	13%	5%	13%	5%	8%	8%	5%	5%
50% Private vehicle - 50% MaaS	8%	10%	10%	18%	11%	12%	15%	9%	9%
40% Private vehicle - 60% MaaS	3%	7%	4%	7%	2%	5%	4%	4%	4%
30% Private vehicle - 70% MaaS	3%	5%	2%	4%	2%	5%	3%	2%	3%
20% Private vehicle - 80% MaaS	3%	3%	2%	3%	2%	4%	2%	2%	2%
10% Private vehicle - 90% MaaS	1%	2%	2%	2%	2%	3%	2%	2%	2%
0% Private vehicle - 100% MaaS	7%	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]; 1,022 [Australia]

Consumers surveyed across global markets expect their use of personal vehicles to decline somewhat in favour 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)

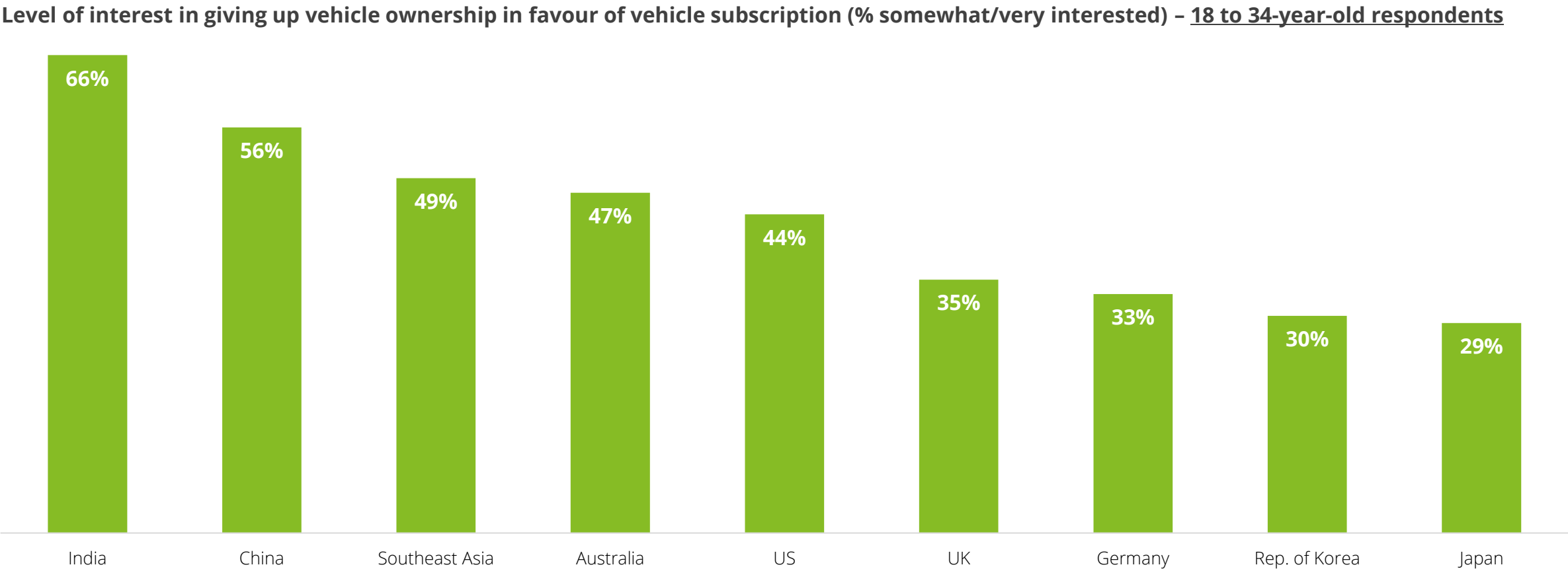
Mix of transportation type	Australia	China	Germany	India	Japan	Rep. of Korea	Southeast Asia	UK	US
100% Private vehicle – 0% MaaS	38%	9%	35%	11%	28%	12%	17%	36%	42%
90% Private vehicle – 10% MaaS	8%	10%	7%	12%	7%	9%	11%	6%	6%
80% Private vehicle - 20% MaaS	11%	16%	10%	16%	8%	11%	12%	8%	8%
70% Private vehicle - 30% MaaS	7%	13%	7%	11%	8%	11%	11%	7%	7%
60% Private vehicle - 40% MaaS	8%	12%	7%	12%	5%	11%	9%	5%	6%
50% Private vehicle - 50% MaaS	11%	18%	12%	16%	16%	19%	18%	13%	13%
40% Private vehicle - 60% MaaS	4%	9%	4%	7%	3%	6%	5%	3%	4%
30% Private vehicle - 70% MaaS	3%	8%	3%	5%	3%	6%	6%	4%	4%
20% Private vehicle - 80% MaaS	3%	4%	4%	4%	2%	4%	5%	4%	2%
10% Private vehicle - 90% MaaS	2%	1%	2%	3%	1%	3%	3%	3%	2%
0% Private vehicle - 100% MaaS	6%	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]; 1,022 [Australia]

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



Q69: To what extent are you interested in giving up vehicle ownership in favour 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]; 1,022 [Australia]



About the study

05

About the study

The 2025 study includes 31,290 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 in 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.

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