



2023 Global Automotive Consumer Study

Key findings from across the globe

May 2023

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

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

- 2010** ● Overall value ranked as the primary factor when evaluating brands
- 2011** ● “Cockpit technology” and the shopping experience-led differentiators
- 2012** ● Interest in hybrids driven by cost and convenience, while interest in connectivity centers on safety
- 2014** ● Shared mobility emerges as an alternative to owning a vehicle
- 2017** ● Interest in full autonomy grows, but consumers want a track record of safety
- 2018** ● Consumers in many global markets continue to move away from internal combustion engines (ICE)
- 2019** ● Consumers “pump the brakes” on interest in autonomous vehicles
- 2020** ● Questions remain regarding consumers’ willingness to pay for advanced technologies
- 2021** ● Online sales gaining traction, but majority of consumers still want in-person purchase experience
- 2022** ● Interest in electrified vehicles (EVs) grows, but worries about price, driving range, and charging time remain

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

From September through October 2022, Deloitte surveyed more than 26,000 consumers in 24 countries to explore opinions regarding a variety of critical issues impacting the automotive sector, including consumer interest in EV adoption, brand perception, and the adoption of connected technologies. The goal of this annual study is to answer important questions that can help companies prioritise and better position their business strategies and investments.

1

The shift to EVs is happening, but is it moving fast enough in some markets?

Consumer interest in EVs is growing as consumers, pressured by hyper-inflationary conditions, look to lower their operating costs. However, individual markets face different challenges to maintain forward momentum. Affordability, range anxiety, and battery safety concerns remain as significant barriers to adoption, with Australians in particular grappling with questions around charging EVs and charging infrastructure.

2

An unintended benefit of the vehicle inventory crisis

Product quality still tops the list of factors driving consumer decisions when it comes to which vehicle brand to buy, but expectations regarding the acceptable length of time to wait for delivery may be starting to stretch out as a lasting by-product of the inventory crisis, potentially opening the door to a new “build-to-order” paradigm. Only one third of Australians expect to take delivery of a new vehicle in less than three weeks.

3

Dealers engender the most trust among consumers

When asked who they trust most, a majority of surveyed consumers across global markets point to the relationship they have with either their selling or servicing dealer, signaling the important role dealers play in the automotive value chain and a key consideration in the conversation around direct-to-consumer sales. Australians broadly follow the global picture, but a notable number trust their ‘local mechanics’ above all else.

4

Subscriptions to connected vehicle services could be a challenge

Consumer interest in connected vehicle features that provide updates regarding traffic congestion, road safety, and vehicle health status are relatively high, but people would much rather pay for connected technologies as part of the upfront cost of the vehicle or on a per use basis compared to a subscription. One in two Australians expect such services to be included up-front in the price of the vehicle

1

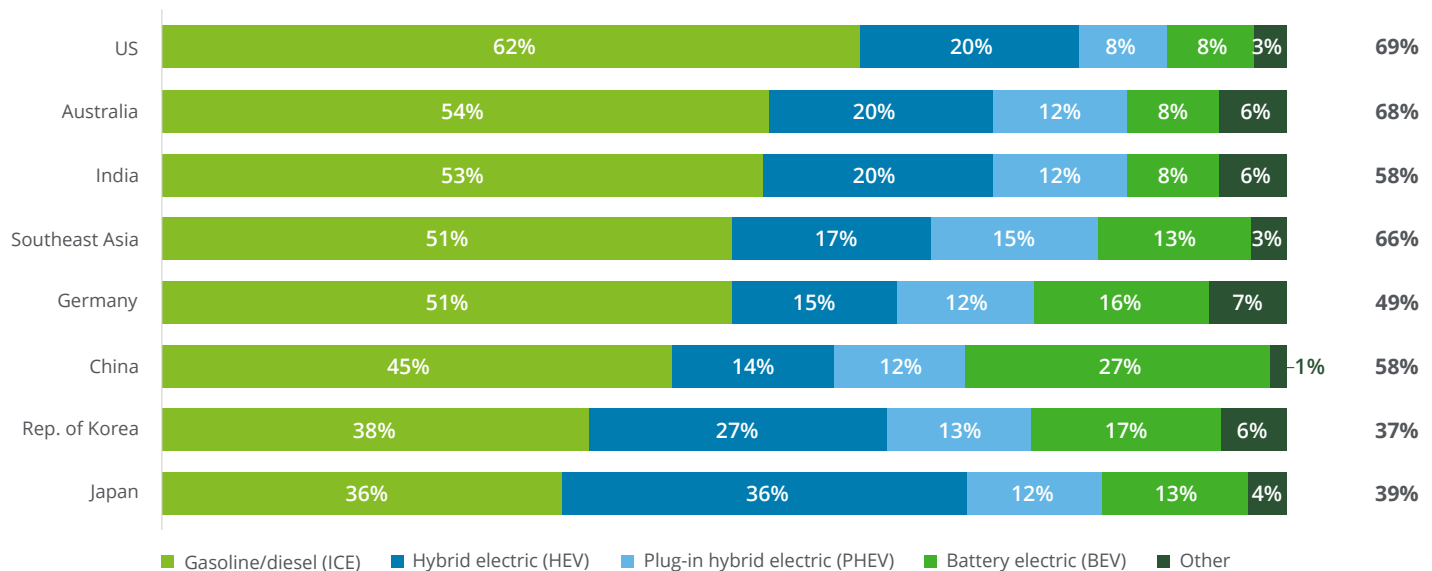
Vehicle electrification



The global shift to electrified vehicles is happening at very different speeds with China leading the pack and the US, Australia & India lagging behind. Hybrid technology offers a 'middle ground' that continues attract more interest than full battery electric vehicles (BEVs) in most countries.

Preference for type of engine in next vehicle

ICE (2022)



Note: Other includes vehicles with engine types such as compressed natural gas, ethanol, and hydrogen fuel cells; don't know responses weren't considered.

Q40. What type of engine would you prefer in your next vehicle?

Sample size: n= 798 [Australia]; n= 703 [China]; 1,128 [Germany]; 948 [India]; 567 [Japan]; 806 [Republic of Korea]; 5,089 [Southeast Asia]; 1,766 [US]

Note throughout: Sum of the values in selected charts may not add to 100% due to rounding.

Despite government messaging around the need to address climate change, the shift to EVs is primarily based on a strong consumer perception that it will significantly reduce vehicle operating costs.

Top reasons to choose an EV as next vehicle

Factors	Australia	China	Germany	India	Japan	Rep. of Korea	Southeast Asia	US
Lower fuel costs	1	2	1	1	1	1	1	1
Better driving experience	4	1	4	2	3	3	2	2
Concern about climate change	2	8	2	5	7	7	6	3
Less maintenance	3	7	5	3	6	4	3	4
Government incentives/subsidies/stimulus programs	5	6	3	7	2	2	5	5
Potential for extra taxes/levies applied to internal combustion vehicles	7	5	6	8	5	5	8	6
Concern about personal health	8	4	7	6	8	8	7	7
Ability to use the vehicle as a backup battery/power source (e.g., for home)	6	3	8	4	4	6	4	8
Peer pressure	9	9	9	9	9	9	9	9

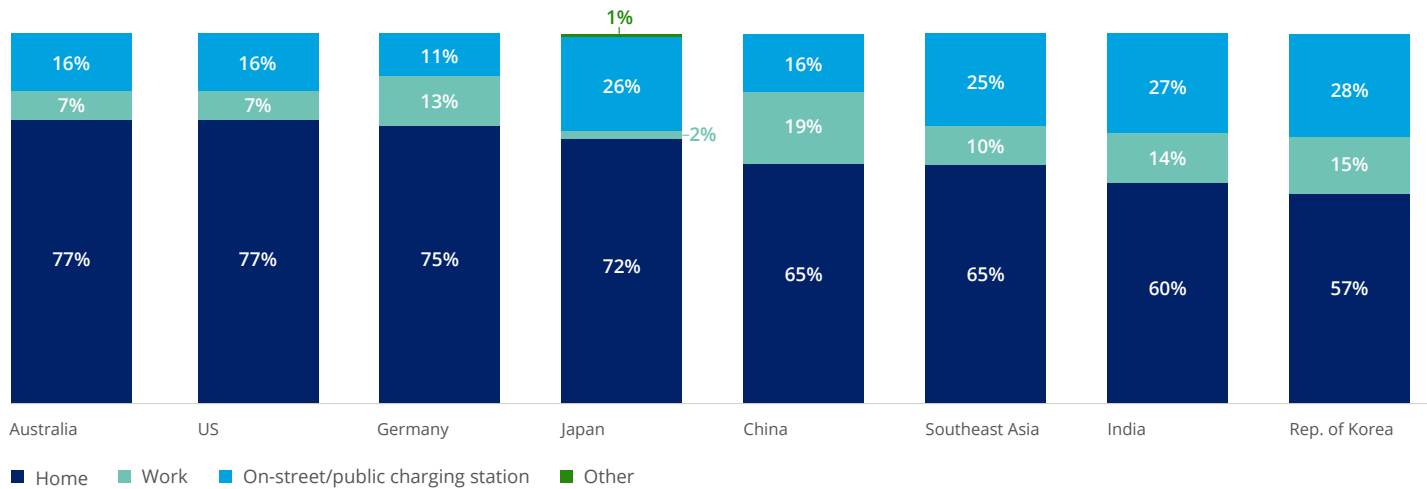
Top reason

Q41. Please rank the following factors in terms of their impact on your decision to acquire an electrified vehicle (highest to lowest).

Sample size: n = 340 [Australia]; n = 374 [China]; 478 [Germany]; 384 [India]; 345 [Japan]; 453 [Republic of Korea]; 2,305 [Southeast Asia]; 618 [US]

Public charging capacity is needed to address concerns over range anxiety, but even in markets with little current public infrastructure, like Australia and the US, people are coming to accept they will charge their EVs at home. This highlights the importance of the availability of home chargers to early EV adoption.

Expecting to charge electrified vehicle most often at...

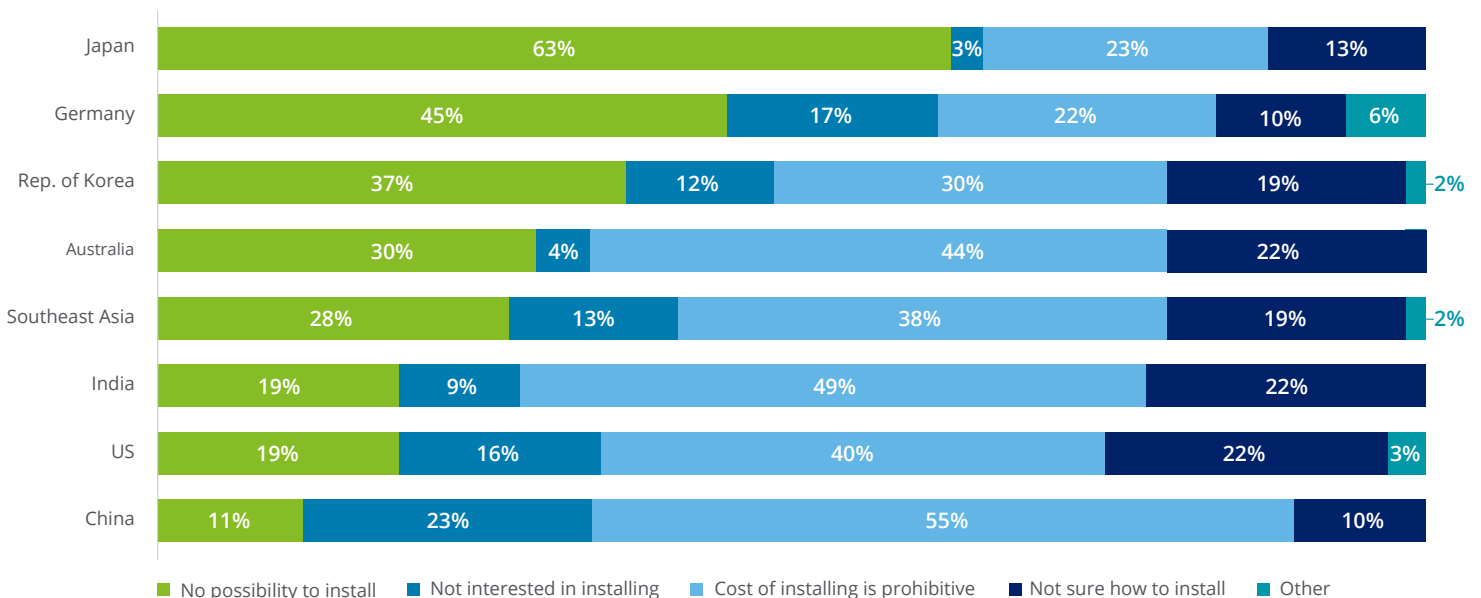


Q43: Where do you expect to charge your electrified vehicle most often?

Sample size: n = 162 [Australia]; n = 273 [China]; 313 [Germany]; 191 [India]; 141 [Japan]; 239 [Republic of Korea]; 1,446 [Southeast Asia]; 273 [US]

Retrofitting home chargers in some markets may be a significant challenge, but there may be an opportunity to engage consumers in markets where the primary barrier to home charging is cost.

Main reason not to charge an EV at home

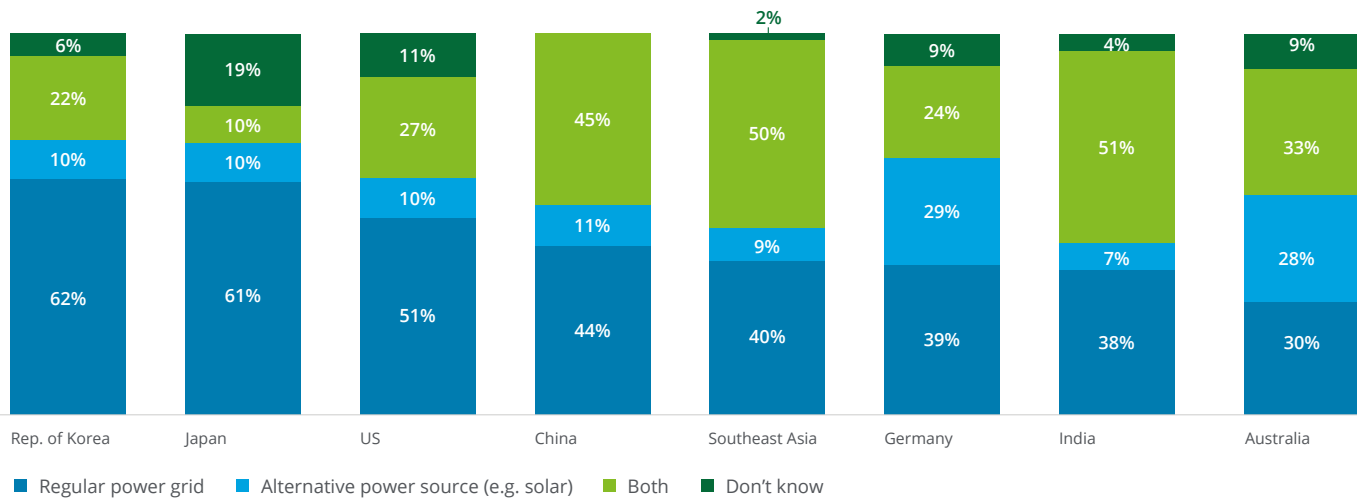


Q45: What is the main reason you do not intend to charge your electrified vehicle at home?

Sample size: n = 162 [Australia]; n = 96 [China]; 78 [Germany]; 77 [India]; 40 [Japan]; 103 [Republic of Korea]; 510 [Southeast Asia]; 63 [US]

Availability of renewable power is important for EV intenders, especially in Germany and Australia, yet questions remain around grid capacity to support the shift away from fossil fuels for powering mobility.

How EV intenders plan to charge their vehicle at home



Q44: How do you intend to charge your electrified vehicle at home?

Sample size: n = 135 [Australia]; n = 177 [China]; 235 [Germany]; 114 [India]; 101 [Japan]; 136 [Republic of Korea]; 936 [Southeast Asia]; 210 [US]

Making it easy for EV owners to pay for public charging is critically important for overall adoption and may be a key differentiator for network operators trying to solidify their position in a hyper-competitive space.

Most preferred way to pay for public EV charging

Payment methods	Australia	China	Germany	India	Japan	Rep. of Korea	Southeast Asia	US
Credit/debit card	58%	17%	47%	28%	51%	57%	31%	56%
Smartphone app	24%	53%	40%	45%	36%	32%	52%	25%
Pre-paid subscription plan	8%	9%	7%	15%	8%	4%	9%	9%
Loyalty points	9%	21%	5%	12%	4%	8%	7%	9%
Other	1%	0%	1%	0%	1%	0%	1%	1%

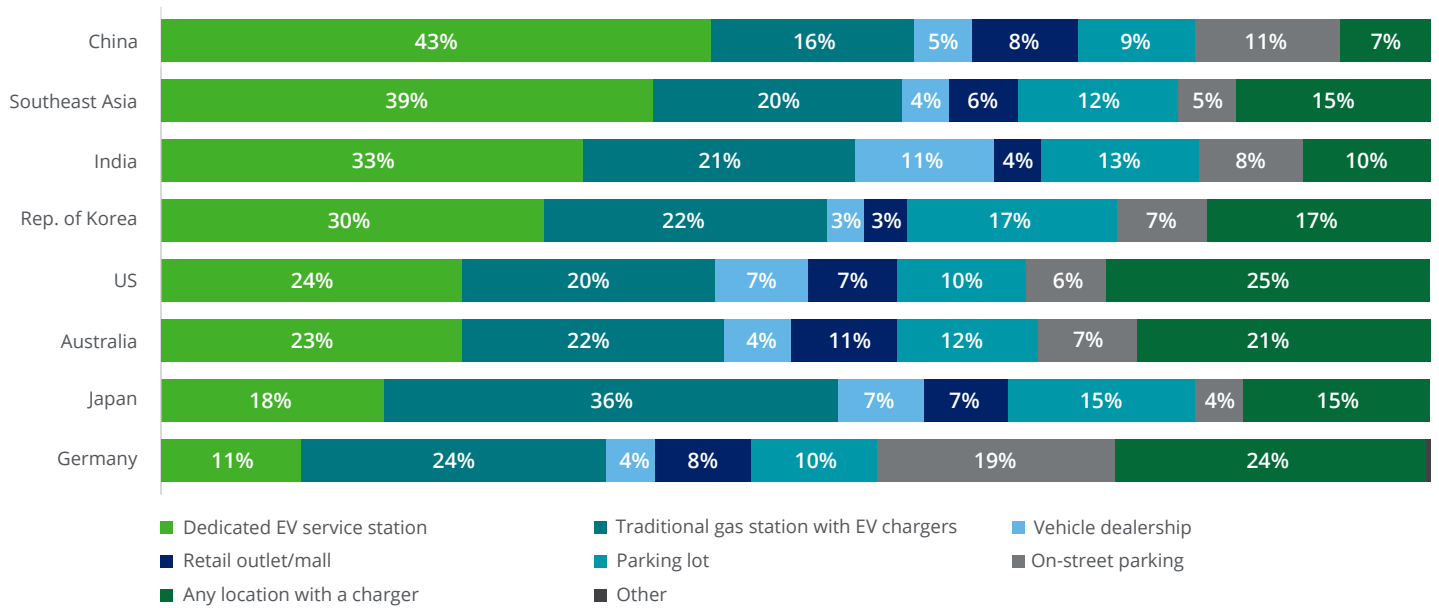
Most preferred mode of payment

Q49: How would you most prefer to pay for public EV charging?

Sample size: n = 340 [Australia]; 374 [China]; 478 [Germany]; 384 [India]; 345 [Japan]; 453 [Republic of Korea]; 2,305 [Southeast Asia]; 618 [US]

When forced to charge on the go, surveyed consumers would most prefer either a dedicated EV service station or a traditional gas station equipped with chargers, but a significant number of people surveyed in Germany and the US simply want access to charging when they need it regardless of location.

Expecting to charge electrified vehicle most often at...



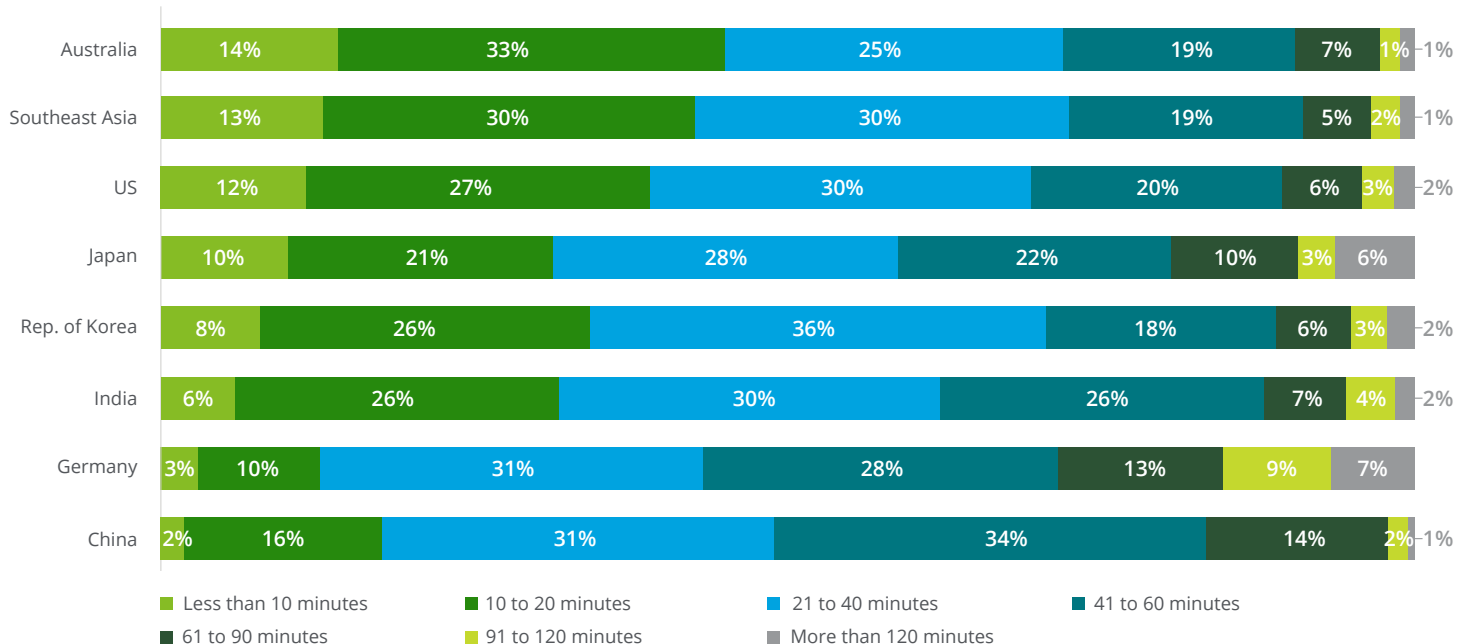
*On-street parking includes community/public buildings, hotels, etc.

Q46: Which of the following public locations makes the most sense to charge your EV when you are away from home?

Sample size: n = 340 [Australia]; n = 374 [China]; 478 [Germany]; 384 [India]; 345 [Japan]; 453 [Republic of Korea]; 2,305 [Southeast Asia]; 618 [US]

The view that EV charge times need to match fossil fuel fill-ups seems overstated with consumers in many markets willing to wait much longer than 10 minutes to refuel. However, attitudes are fixed elsewhere, with c. 40% of consumers in Australia, South East Asia & the US expecting a charge to take less than 20 minutes

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



Q47: How long would you expect it to take to charge your EV from empty to 80% at a public charging location?

Sample size: n = 340 [Australia]; n = 374 [China]; 478 [Germany]; 384 [India]; 345 [Japan]; 453 [Republic of Korea]; 2,305 [Southeast Asia]; 618 [US]

With consumers ready to spend a significant amount of time at charging stations, service providers can focus on amenities like Wi-Fi connectivity, beverages, and restrooms.

Type of amenities that the surveyed consumers want to have access to while their vehicle is charging at a public location

Amenities	Australia	China	Germany	India	Japan	Rep. of Korea	Southeast Asia	US
Wi-fi connectivity	55%	52%	60%	62%	61%	53%	72%	64%
Washrooms	69%	50%	61%	62%	34%	57%	70%	60%
Coffee/beverages	65%	43%	55%	63%	68%	71%	76%	56%
Snacks/light meals	50%	36%	35%	56%	44%	45%	60%	48%
Lounge/sitting area	47%	52%	30%	52%	58%	49%	60%	46%
Full-service restaurant	21%	40%	23%	42%	23%	9%	47%	31%
Private meeting room	9%	16%	5%	29%	16%	5%	20%	12%

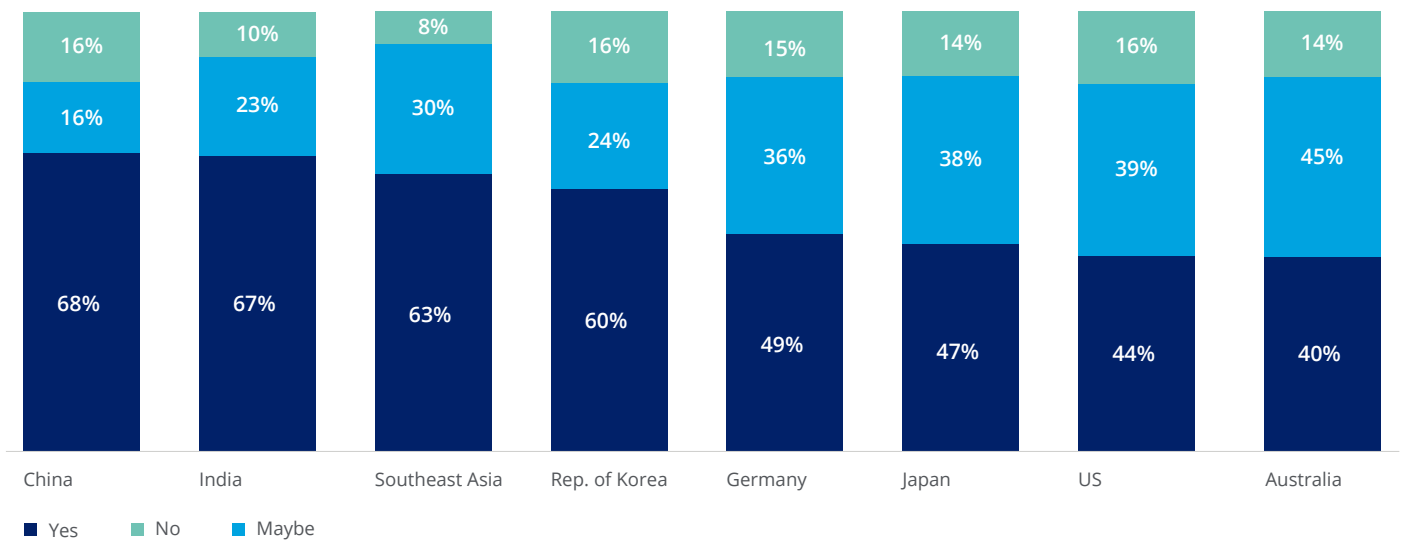
■ Top choice

Q48: What type of amenities would you want to have access to while your vehicle is charging at a public location?

Sample size: n = 240 [Australia]; n = 374 [China]; 478 [Germany]; 384 [India]; 345 [Japan]; 453 [Republic of Korea]; 2,305 [Southeast Asia]; 618 [US]

Globally, there is a consistent, if small, level of consumers who would buy an EV even if an environmentally sustainable, synthetic fuel for use in traditional combustion engines becomes available. However, a significant number of surveyed EV intenders would be willing to at least re-consider their decision.

Percentage of consumers who would rethink to purchase an EV if an environmentally sustainable, synthetic fuel alternative is available for traditional (ICE) engines

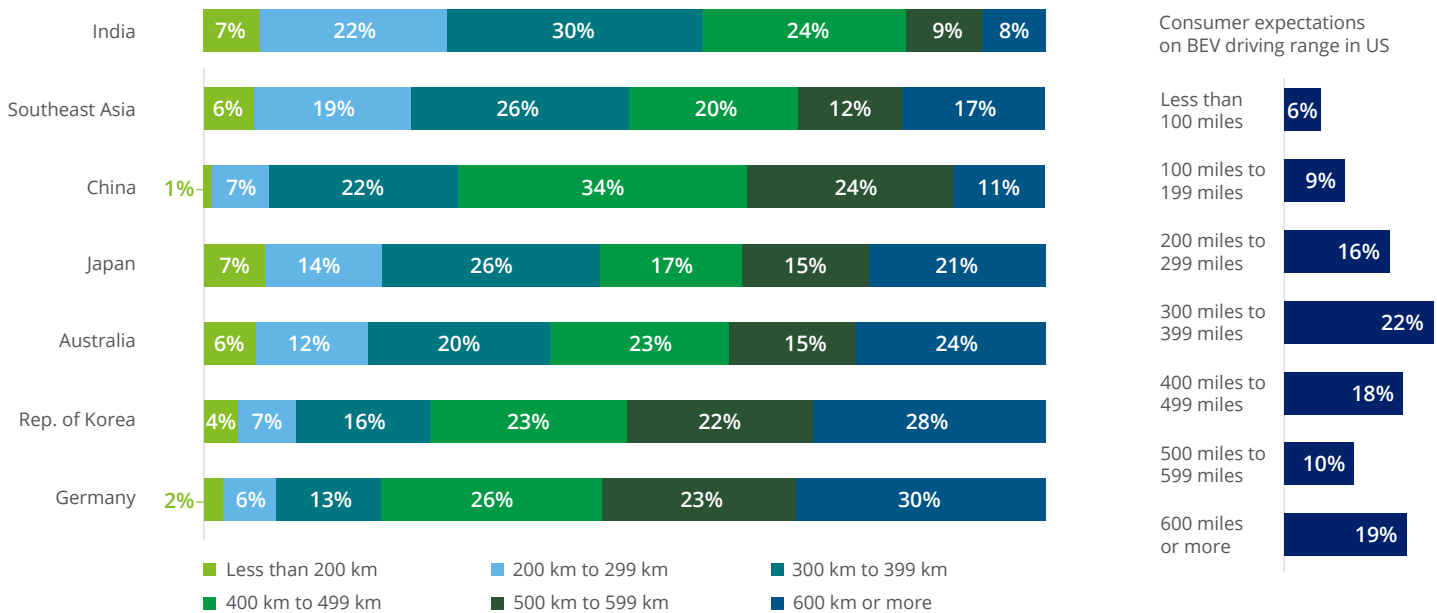


Q42. In a scenario where an environmentally sustainable, synthetic fuel alternative (i.e., carbon-neutral gas) that would work in traditional internal combustion engines was readily available, would you rethink your decision to purchase an EV?

Sample size: n = 340 [Australia]; n = 374 [China]; 478 [Germany]; 384 [India]; 345 [Japan]; 453 [Republic of Korea]; 2,305 [Southeast Asia]; 618 [US]

Expectations for BEV driving range vary significantly by global market as 41% of surveyed consumers in India want 400 km or more, whereas 79% of consumers in Germany said the same.

Consumer expectations on BEV driving range



Q52: How much driving range would a fully charged all-battery electric vehicle need to have in order for you to consider acquiring one?

Sample size: n = 839 [Australia]; n = 516 [China]; 1,103 [Germany]; 879 [India]; 597 [Japan]; 757 [Republic of Korea]; 4,578 [Southeast Asia]; 1,746 [US]

With the exception of China where BEV battery safety is top of mind, surveyed consumers are generally most concerned about charging time, a lack of affordability, and range anxiety (vehicle + charging infrastructure).

Greatest concern regarding all battery-powered electric vehicles

Concern	Australia	China	Germany	India	Japan	Rep. of Korea	Southeast Asia	US
Cost/price premium	53%	19%	44%	36%	50%	38%	43%	52%
Driving range	49%	29%	57%	32%	43%	36%	43%	48%
Time required to charge	52%	30%	45%	36%	50%	49%	49%	47%
Lack of public electric vehicle charging infrastructure	51%	29%	47%	43%	46%	42%	54%	46%
Lack of a charger at home	44%	15%	45%	31%	47%	27%	36%	40%
Cold weather performance	26%	28%	34%	35%	27%	39%	31%	33%
On going charging and running costs	34%	27%	26%	29%	32%	29%	40%	33%
Safety concerns with battery technology	28%	32%	30%	40%	30%	46%	40%	30%
Lack of sustainability (i.e., battery manufacturing/recycling)	29%	29%	32%	36%	24%	24%	33%	30%
Increased need to plan trips	29%	16%	23%	24%	10%	12%	25%	27%
Lack of alternate power source (e.g., solar) at home	27%	17%	26%	33%	25%	19%	34%	23%
Lack of knowledge about EVs/EV technology	29%	20%	13%	33%	21%	18%	34%	22%
Potential for extra taxes/levies associated with BEVs	25%	19%	10%	27%	15%	20%	25%	20%
Uncertain resale value	21%	16%	20%	22%	16%	23%	25%	15%
Lack of choice	21%	13%	13%	25%	10%	11%	19%	14%

■ Most commonly cited

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

Q51: What are your biggest concerns regarding all battery-powered electric vehicles? Please select all that apply.

Sample size: n = 919 [Australia]; n = 707 [China]; 1,278 [Germany]; 957 [India]; 670 [Japan]; 893 [Republic of Korea]; 5,264 [Southeast Asia]; 1,881 [US]

2 Future vehicle intentions



Except for Japan where vehicle features are the driving force behind choosing a brand, consumers rely on a perception of product quality when making a purchase decision.

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	US
Product quality	64%	48%	54%	62%	47%	55%	71%	61%
Vehicle features	46%	31%	32%	48%	50%	33%	52%	38%
Vehicle performance (e.g., fuel efficiency, battery range)	37%	17%	20%	41%	42%	45%	45%	37%
Quality of overall ownership experience	30%	31%	29%	35%	9%	21%	36%	36%
Brand familiarity	31%	36%	35%	37%	19%	26%	34%	31%
Price	37%	6%	31%	22%	42%	23%	32%	31%
Previous sales experience	16%	13%	40%	29%	20%	24%	21%	24%
Previous service experience	16%	28%	21%	28%	21%	13%	27%	21%
Brand image (i.e., environmentalism, purpose, sustainability)	14%	36%	18%	46%	23%	27%	39%	17%
Availability of battery electric vehicles/hybrid options	16%	19%	12%	34%	16%	19%	25%	15%
Brand advertising	10%	29%	8%	31%	9%	11%	21%	11%
Brand affiliations (e.g., sponsorships, partners)	6%	23%	5%	26%	4%	6%	15%	7%

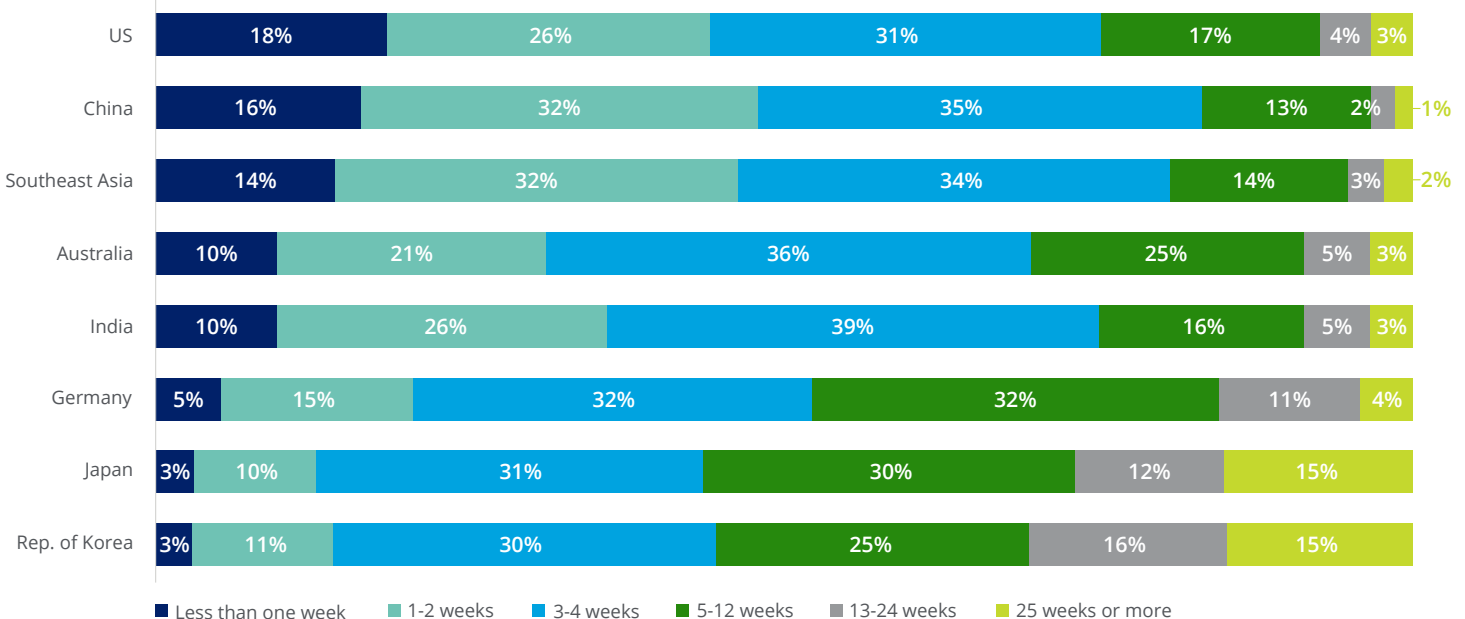
■ Most commonly cited

Q35. What are the most important factors driving the choice of brand for your next vehicle? (Please select all that apply).

Sample size: n = 919 [Australia]; n = 707 [China]; 1,278 [Germany]; 957 [India]; 670 [Japan]; 893 [Republic of Korea]; 5,264 [Southeast Asia]; 1,881 [US]

The current inventory crisis may be training consumers to expect longer wait times for delivery of a new vehicle, potentially opening the door to a more “build-to-order” retail paradigm.

Acceptable length of time to wait for delivery of next vehicle



Q37: In your opinion, what is an acceptable length of time to wait for delivery of your next vehicle if it meant you got exactly what you wanted (i.e., features, color, etc.)?

Sample size: n = 919 [Australia]; n = 707 [China]; 1,278 [Germany]; 957 [India]; 670 [Japan]; 893 [Republic of Korea]; 5,264 [Southeast Asia]; 1,881 [US]

When it comes to vehicle purchase experience expectations, surveyed consumers in most markets place the greatest emphasis on getting a good deal with transparent pricing.

Most important aspects of the purchase experience

Aspect of vehicle purchase experience	Australia	China	Germany	India	Japan	Rep. of Korea	Southeast Asia	US
Getting a good deal	65%	33%	66%	40%	65%	52%	49%	57%
Transparent pricing	49%	29%	37%	36%	47%	63%	46%	45%
Physical interaction with the vehicle (i.e., test drive)	48%	34%	36%	40%	51%	26%	41%	42%
Lower pressure experience	24%	18%	27%	14%	12%	13%	14%	29%
Getting all my questions answered	31%	29%	33%	30%	16%	12%	29%	28%
Convenient location	25%	21%	25%	21%	19%	23%	20%	23%
To be offered different financing and usage-based models	12%	26%	20%	26%	13%	22%	24%	17%
Making good use of my time	10%	24%	11%	24%	14%	15%	16%	16%
Ability to complete all or some of the process online	11%	25%	11%	29%	11%	13%	18%	16%
Building trust in the salesperson	13%	26%	23%	17%	31%	18%	18%	14%
Having a resource for post-purchase needs	12%	36%	11%	22%	19%	42%	26%	13%

■ Most commonly cited

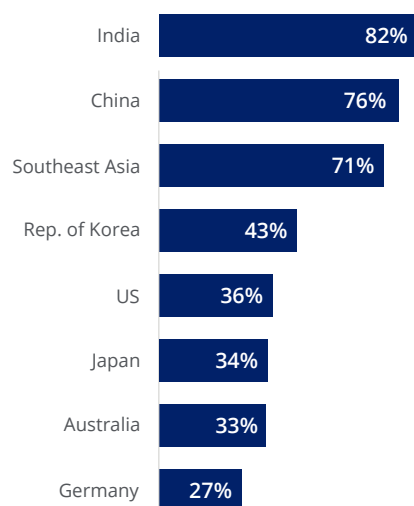
Note: Sum of the percentages exceed 100% as respondents can select multiple options.

Q59: When looking to acquire your next vehicle, what are the top three most important aspects of the purchase experience?

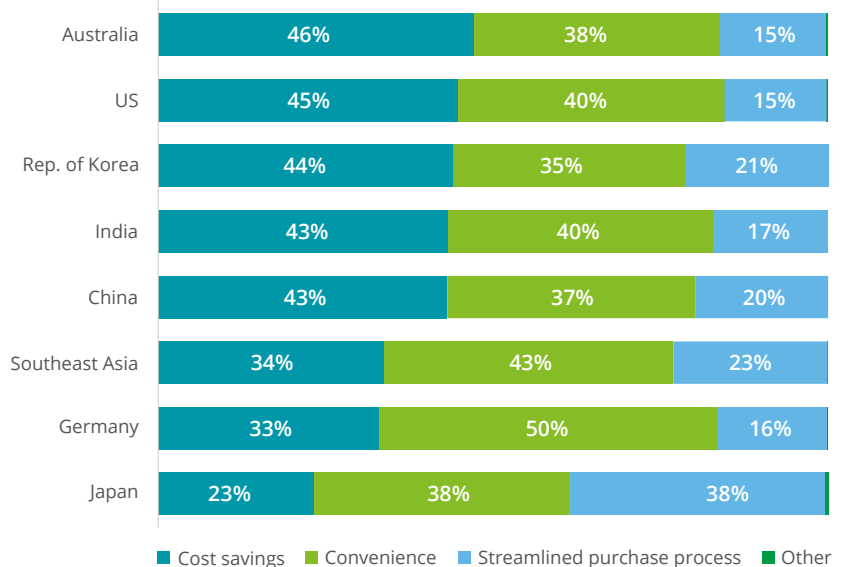
Sample size: n = 919 [Australia]; n = 707 [China]; 1,278 [Germany]; 957 [India]; 670 [Japan]; 893 [Republic of Korea]; 5,264 [Southeast Asia]; 1,881 [US]

As OEMs look to new profit pools, consumers in developing markets, such as India and China, show significant interest in OEM insurance products, feeling they will be convenient and cost-effective. While consumers in mature markets, like Australia and the US, also see the possible cost benefits, this does not translate into the same level of interest.

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



For those consumers who are interested in purchasing insurance directly from the manufacturer, primary benefits are...



■ Cost savings ■ Convenience ■ Streamlined purchase process ■ Other

Q60: The next time you acquire a vehicle, how interested would you be in purchasing insurance directly from the vehicle manufacturer?; Q61: What do you expect the primary benefit of buying insurance directly from the manufacturer to be?

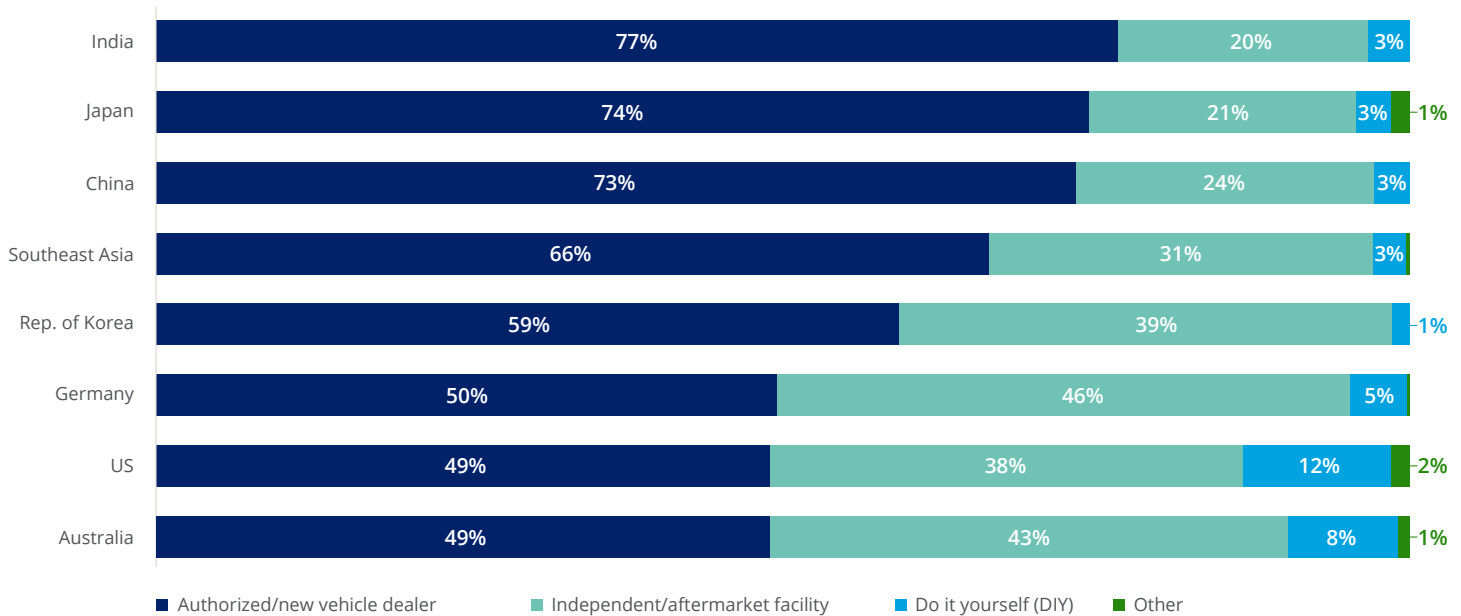
Sample size: n for Q60= 919 [Australia]; 707 [China]; 1,278 [Germany]; 957 [India]; 670 [Japan]; 893 [Republic of Korea]; 5,264 [Southeast Asia]; 1,881 [US]; n for Q61= 300 [Australia]; 535 [China]; 342 [Germany]; 783 [India]; 231 [Japan]; 388 [Republic of Korea]; 3,750 [Southeast Asia]; 684 [US]

3 Vehicle brand and service



A preference for new vehicle dealers as primary service providers is more pronounced in India, Japan, and China compared to Germany, the US and Australia, where aftermarket players claim a greater share of the vehicle service market.

Preferred vehicle service provider



Q24. Where do you normally service your vehicle?

Sample size: n = 900 [Australia]; n = 813 [China]; 1,193 [Germany]; 847 [India]; 575 [Japan]; 773 [Republic of Korea]; 4,401 [Southeast Asia]; 1,789 [US]

Consumers surveyed service their vehicle at a dealership mainly due to a perception of work quality and trust they engender, while the primary reason for servicing at an aftermarket provider varies significantly by market.

Reasons for choosing vehicle service provider (by preferred provider)

	Dealer				
	Cost	Trust	Convenience	Quality of work	Customer experience
Australia	15%	22%	16%	33%	10%
China	8%	21%	15%	40%	16%
Germany	9%	30%	7%	34%	17%
India	7%	28%	10%	41%	13%
Japan	11%	54%	13%	10%	7%
Republic of Korea	12%	34%	13%	34%	7%
Southeast Asia	8%	34%	13%	34%	11%
United States	12%	23%	11%	36%	14%

	Aftermarket				
	Cost	Trust	Convenience	Quality of work	Customer experience
Australia	27%	22%	16%	28%	7%
China	20%	19%	18%	27%	16%
Germany	27%	29%	8%	19%	14%
India	13%	28%	20%	23%	16%
Japan	43%	15%	25%	8%	7%
Republic of Korea	24%	29%	13%	28%	6%
Southeast Asia	23%	20%	16%	32%	8%
United States	34%	19%	15%	23%	9%

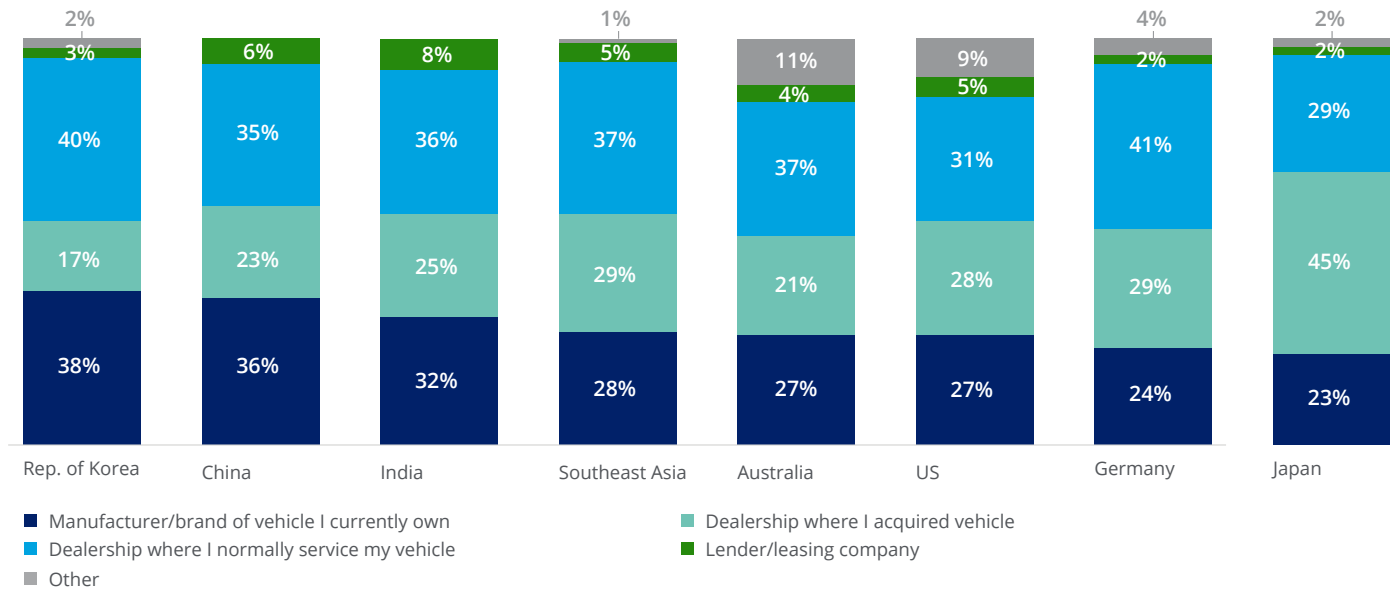
Primary reason for choice

Q25. What is the most important reason for your preferred choice of vehicle service provider?

Sample size: n = 900 [Australia]; n = 790 [China]; 1,136 [Germany]; 819 [India]; 550 [Japan]; 762 [Republic of Korea]; 4,268 [Southeast Asia]; 1,551 [US]

Consumers across markets most trust the dealer where they originally acquired or normally service their vehicle, signaling the important role dealers play in maintaining customer relationships.

Consumers surveyed have the most trusted relationship with...



Q27: With whom do you have the most trusted relationship?

Sample size: n = 900 [Australia]; n = 813 [China]; 1,193 [Germany]; 847 [India]; 575 [Japan]; 773 [Republic of Korea]; 4,401 [Southeast Asia]; 1,789 [US]

Surveyed consumers, across markets, expect a brand app to help them with vehicle's features, schedule service appointments, and making payments; however, interest in using brand apps for charging and public parking is significantly lower.

Important features for a vehicle brand app	Australia	China	Germany	India	Japan	Rep. of Korea	Southeast Asia	US
Learn about your vehicle's features	39%	36%	37%	42%	46%	53%	52%	36%
Schedule service	38%	37%	32%	42%	24%	38%	45%	35%
Make payments	18%	26%	15%	48%	28%	20%	42%	29%
Track service appointments (i.e., cost, timing)	30%	35%	38%	44%	26%	33%	46%	25%
Lock/unlock vehicle	20%	15%	14%	26%	20%	24%	31%	24%
Track your vehicle's location	19%	23%	20%	35%	14%	19%	35%	20%
Locate a dealer	20%	22%	17%	32%	11%	25%	26%	20%
Chat with a live agent	17%	16%	8%	37%	9%	20%	30%	19%
Remote start	10%	19%	6%	23%	9%	21%	23%	19%
Build and price your next vehicle	17%	23%	15%	26%	15%	17%	22%	17%
Purchase accessories	16%	25%	15%	36%	10%	11%	34%	14%
View and add features that enhance my vehicle	15%	21%	13%	36%	14%	33%	32%	14%
View and add battery life	14%	13%	16%	28%	17%	28%	29%	12%
View/redeem loyalty points	10%	15%	7%	22%	7%	16%	21%	10%
Search and pay for public vehicle charging access	9%	6%	11%	20%	8%	12%	19%	7%
Search and pay for public parking	8%	4%	11%	9%	10%	10%	14%	5%

■ Most commonly cited

Q28. What are the most important features of a vehicle brand app? (Please select all that apply).

Sample size: n = 900 [Australia]; n = 813 [China]; 1,193 [Germany]; 847 [India]; 575 [Japan]; 773 [Republic of Korea]; 4,401 [Southeast Asia]; 1,789 [US]

4 Connectivity



Surveyed consumers in developing markets see greater benefits in connected vehicles and are ready to share PII* while consumers in Germany and the US have more limited interest.

Level of consumer interest in connected vehicle features (% very/somewhat interested)

Connected vehicle features	Australia	China	Germany	India	Japan	Rep. of Korea	Southeast Asia	US
Maintenance updates and vehicle health reporting / alerts	63%	80%	56%	84%	62%	66%	81%	60%
Updates regarding traffic congestion and suggested alternate routes	64%	78%	58%	83%	66%	75%	81%	58%
Updates to improve road safety and prevent potential collisions	63%	80%	53%	84%	66%	72%	81%	57%
Suggestions regarding safer routes (i.e., avoid unpaved roads)	55%	82%	43%	85%	63%	68%	78%	54%
Maintenance cost forecasts based on your driving habits	60%	81%	47%	81%	54%	61%	78%	53%
Customized suggestions regarding ways to minimize service expenses	59%	80%	46%	81%	62%	74%	77%	50%
Over-the-air vehicle software updates that correct or improve your driving experience	49%	76%	37%	80%	50%	62%	74%	49%
Access to nearby parking (i.e., availability, booking, and payment)	53%	78%	51%	82%	60%	68%	76%	48%
Receiving a discount for access to a Wi-Fi connection in your vehicle	45%	77%	38%	78%	57%	60%	71%	47%
Customized/optimized vehicle insurance plan (e.g., "pay how you drive" plans)	50%	76%	46%	79%	47%	65%	72%	46%
Special offers regarding non-automotive products and services related to your journey or destination	39%	76%	32%	79%	49%	55%	69%	40%

■ Most commonly cited

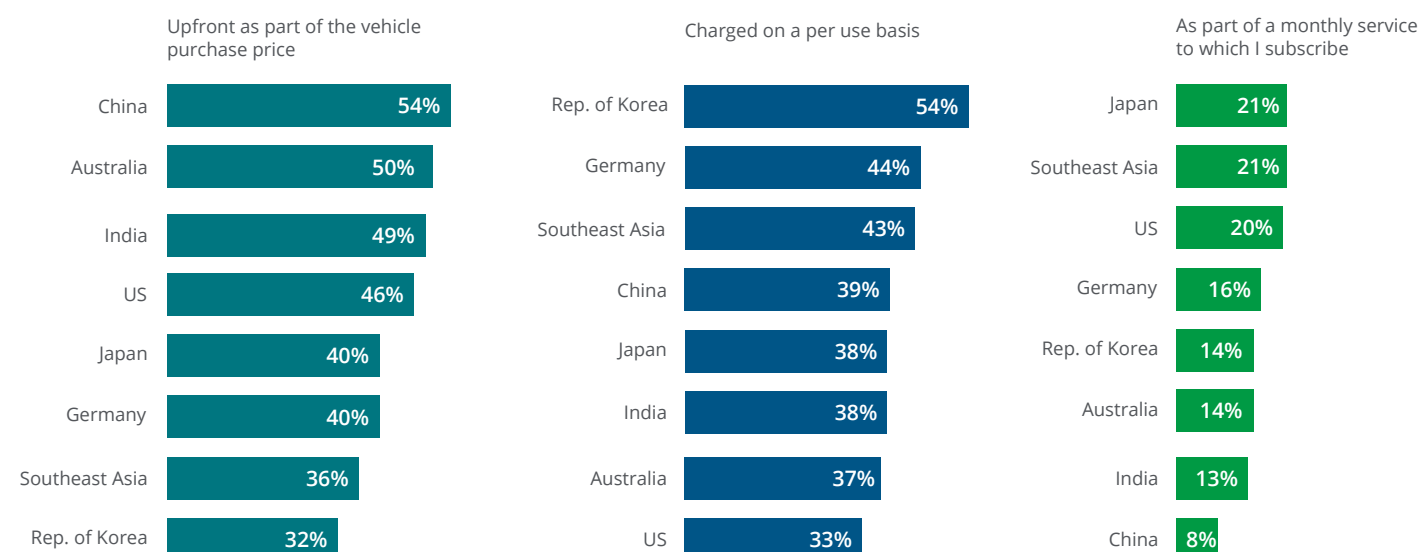
*Personally identifiable information.

Q55: How interested are you in the following benefits of a connected vehicle if it meant sharing your own personally identifying data and/or vehicle/operational data with the manufacturer or a third party?

Sample size: n for Q55= 919 [Australia]; 707 [China]; 1,278 [Germany]; 957 [India]; 670 [Japan]; 893 [Republic of Korea]; 5,264 [Southeast Asia]; 1,881 [US]

Mobility providers looking to offer subscription services for connected vehicle technologies may find it challenging as most surveyed consumers would rather pay for these features either upfront as part of the vehicle purchase price or on a per use basis.

Consumers' preferred ways to pay for additional connectivity technologies



Q58: How would you prefer to pay for additional connectivity technologies in your vehicle?

Sample size: n = 919 [Australia]; 707 [China]; 1,278 [Germany]; 957 [India]; 670 [Japan]; 893 [Republic of Korea]; 5,264 [Southeast Asia]; 1,881 [US]

About the study



About the study

The 2023 study includes more than 26,000 consumer responses from 24 countries around the world.

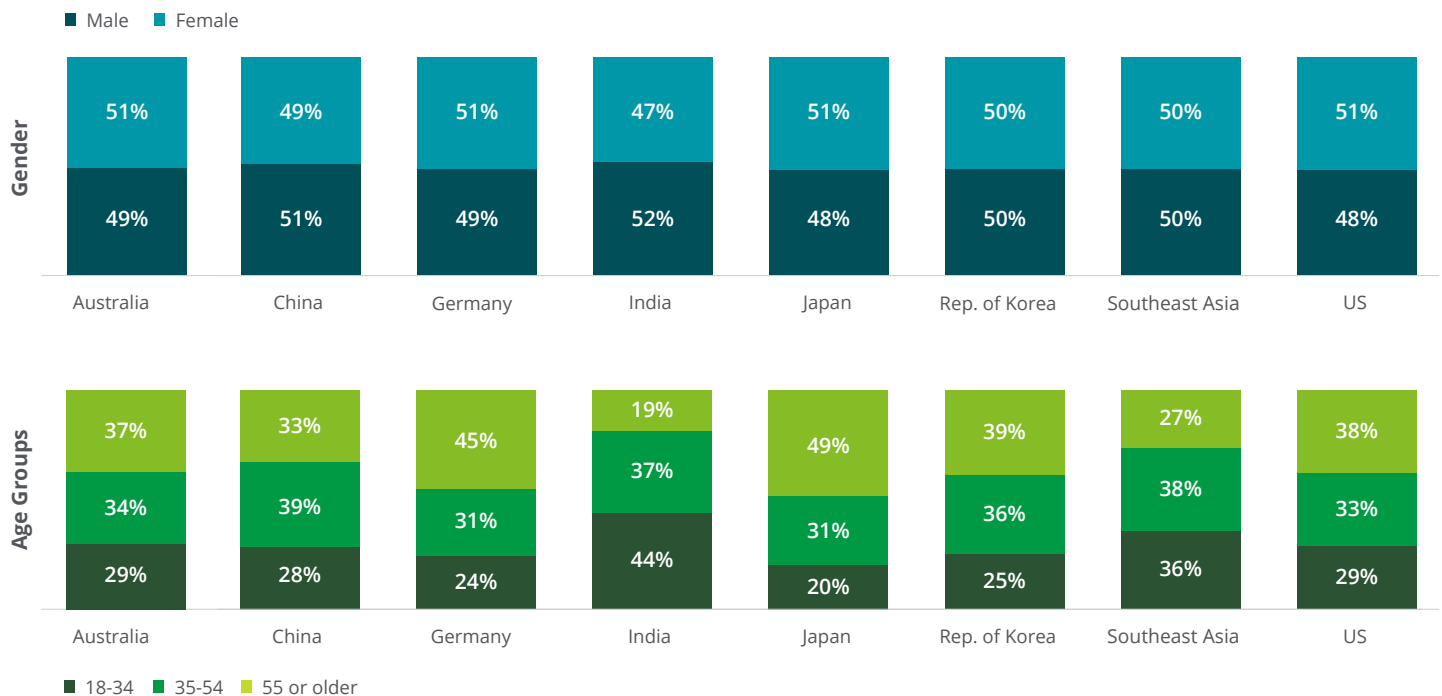
North America	Sample	EMEA	Sample	Asia-Pacific	Sample
Canada (CA)	1,011	Austria (AT)	1,004	Australia (AU)	1,005
Mexico (MX)	1,008	Belgium (BE)	1,019	China (CN)	1,012
United States (US)	2,011	France (FR)	1,006	India (IN)	1,003
		Germany (DE)	1,506	Indonesia (ID)	1,003
		Italy (IT)	1,002	Japan (JP)	1,017
		Poland (PL)	1,002	Malaysia (MY)	1,006
		South Africa (ZA)	1,014	Philippines (PH)	1,008
		Spain (ES)	1,009	Republic of Korea (KR)	1,011
		Turnkey (TR)	1,006	Singapore (SG)	1,003
		United Kingdom (GB)	1,514	Thailand (TH)	1,009
				Vietnam (VN)	1,019

Study methodology

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

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

Study demographics



Note: Non-binary/Non-gender confirming/Prefer not to answer percentage for India, Japan, and US is 1%; Southeast Asia region comprises Indonesia, Malaysia, Philippines, Singapore, Thailand, and Vietnam markets.

Sample size: n = 1,005 [Australia]; 1,012 [China]; 1,506 [Germany]; 1,003 [India]; 1,017 [Japan]; 1,011 [Republic of Korea]; 6,048 [Southeast Asia]; 2,011 [US]

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For more insights and analysis, please click [here](#) or scan the QR code.



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