2023 Global Automotive Consumer Study

Key findings: EMEA Focus countries

February 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
2023	Shift to electric vehicles (EVs) is primarily driven by the belief that EVs will substantially reduce vehicle operating costs

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 deploying advanced technologies. The overall goal of this EMEA Focus report is to answer important questions that can help companies in the region to 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?

Interest in EVs is growing as consumers, pressured by hyper-inflationary conditions, look to lower their costs. However, individual markets face different challenges to maintain forward momentum. Affordability, range anxiety, and lack of charging infrastructure concerns remain as significant barriers to adoption.

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.

3

Dealers engender the most trust among consumers

When asked who they trust most, a majority of surveyed consumers across EMEA markets with an exception of consumers in Poland, 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.

4

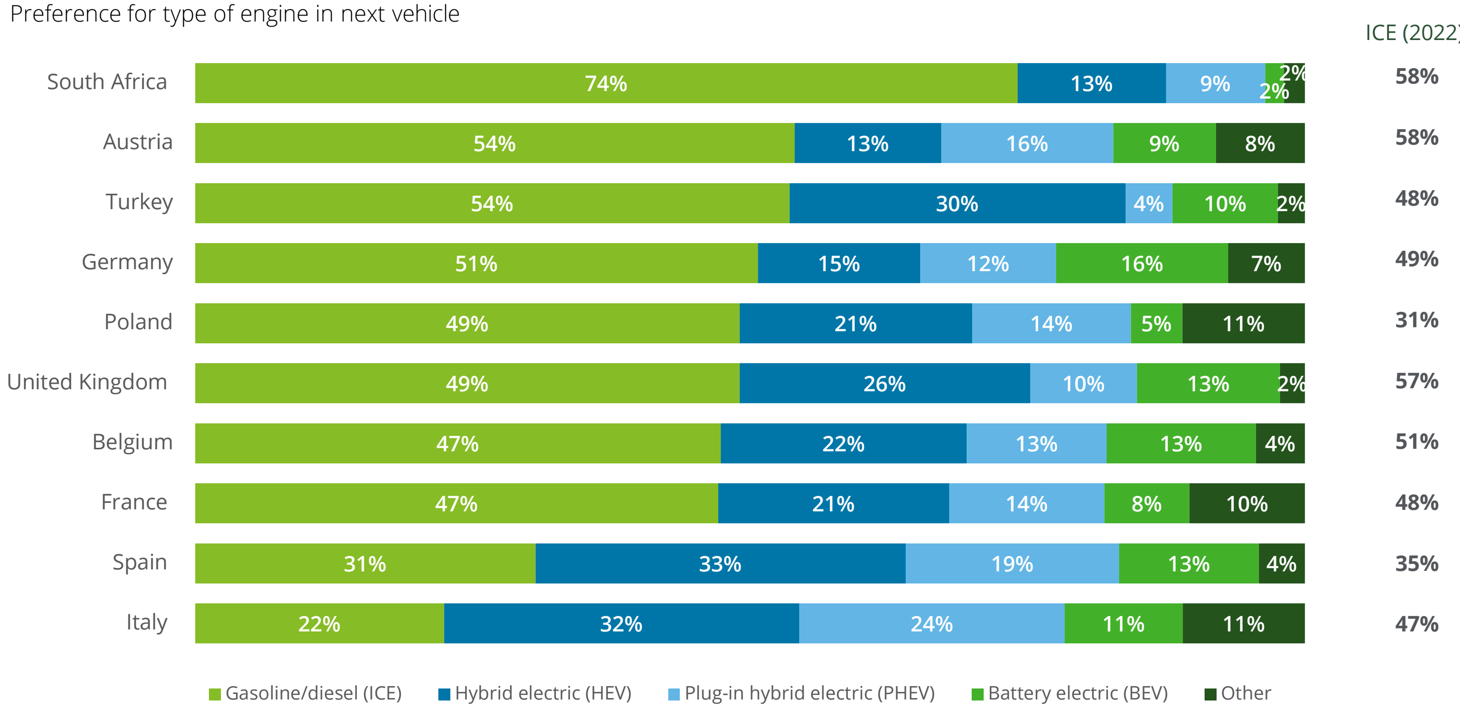
Subscriptions to connected vehicle services could be a challenge

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 when compared to a subscription.

1 Vehicle electrification

The shift to electrified vehicles is happening at very different speeds depending on the individual market. Though there is an inclination towards ICE in some EMEA markets, hybrid technology seems far more popular than battery electric vehicles (BEVs) at the moment.

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; don't know responses weren't considered.
Q40. What type of engine would you prefer in your next vehicle?
Sample size: n= 735 [Austria]; 699 [Belgium]; 730 [France]; 1,128 [Germany]; 790 [Italy]; 797 [Poland]; 950 [South Africa]; 770 [Spain]; 947 [Turkey]; 1,156 [United Kingdom]

Despite the concerns over addressing climate change, the shift to EVs is primarily based on a strong consumer perception that it will substantially reduce vehicle operating costs.

Top reasons to choose an EV as next vehicle

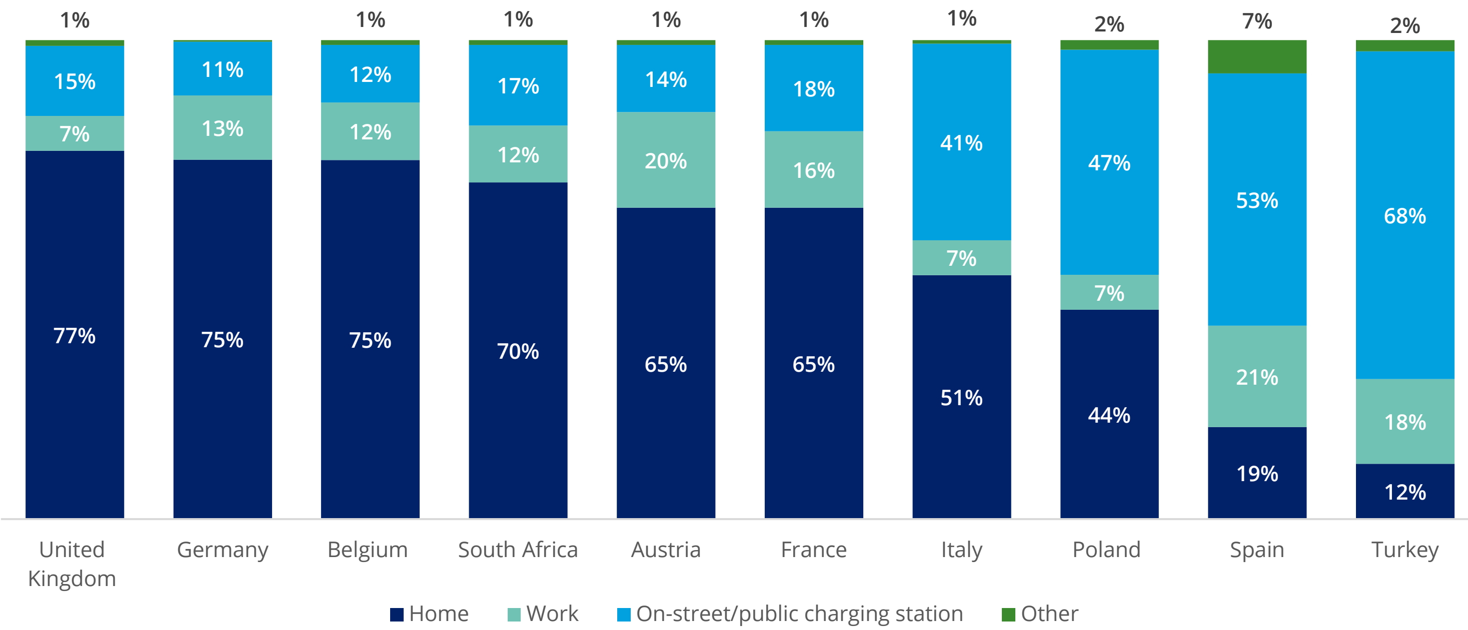
Factors	Austria	Belgium	France	Germany	Italy	Poland	South Africa	Spain	Turkey	United Kingdom
Lower fuel costs	1	1	1	1	1	1	1	1	1	1
Better driving experience	6	5	5	4	7	2	3	4	2	3
Concern about climate change	3	6	4	2	2	4	2	2	6	2
Less maintenance	4	2	3	5	4	6	4	5	3	5
Government incentives / subsidies / stimulus programs	2	4	2	3	3	5	8	3	4	4
Potential for extra taxes/levies applied to internal combustion vehicles	4	3	6	6	5	7	7	7	5	6
Concern about personal health	8	7	7	7	6	3	5	6	7	7
Ability to use the vehicle as a backup battery / power source (e.g., for home)	7	8	8	8	8	8	6	8	8	8
Peer pressure	9	9	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= 279 [Austria]; 337 [Belgium]; 310 [France]; 478 [Germany]; 526 [Italy]; 318 [Poland]; 228 [South Africa]; 502 [Spain]; 417 [Turkey]; 563 [United Kingdom]

A focus on providing public charging infrastructure is required to address consumer concerns over range anxiety, but the convenience of the day-to-day usage means a vast majority of the people prefer to charge their EVs at home. However, this leads to questions around the availability of charging points in densely populated residential areas.

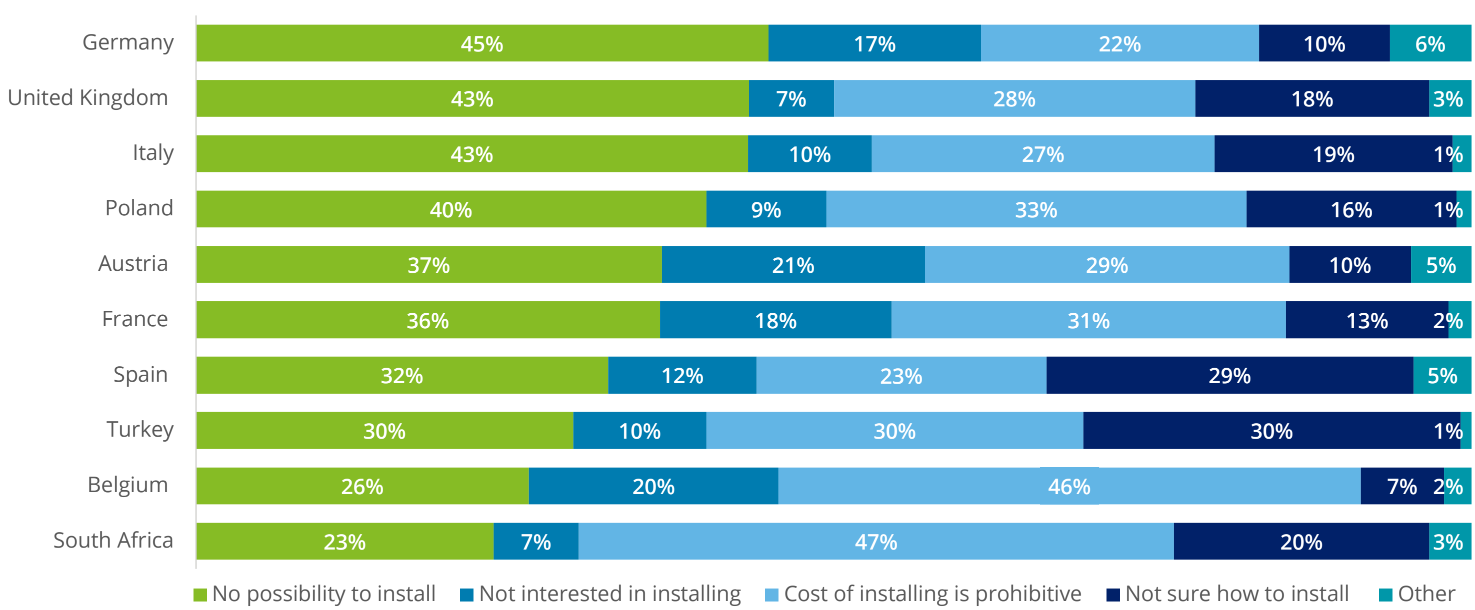
Expecting to charge electrified vehicle most often at...



Q43: Where do you expect to charge your electrified vehicle most often?
Sample size: n= 182 [Austria]; 182 [Belgium]; 158 [France]; 313 [Germany]; 273 [Italy]; 151 [Poland]; 101 [South Africa]; 245 [Spain]; 130 [Turkey]; 260 [United Kingdom]

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.

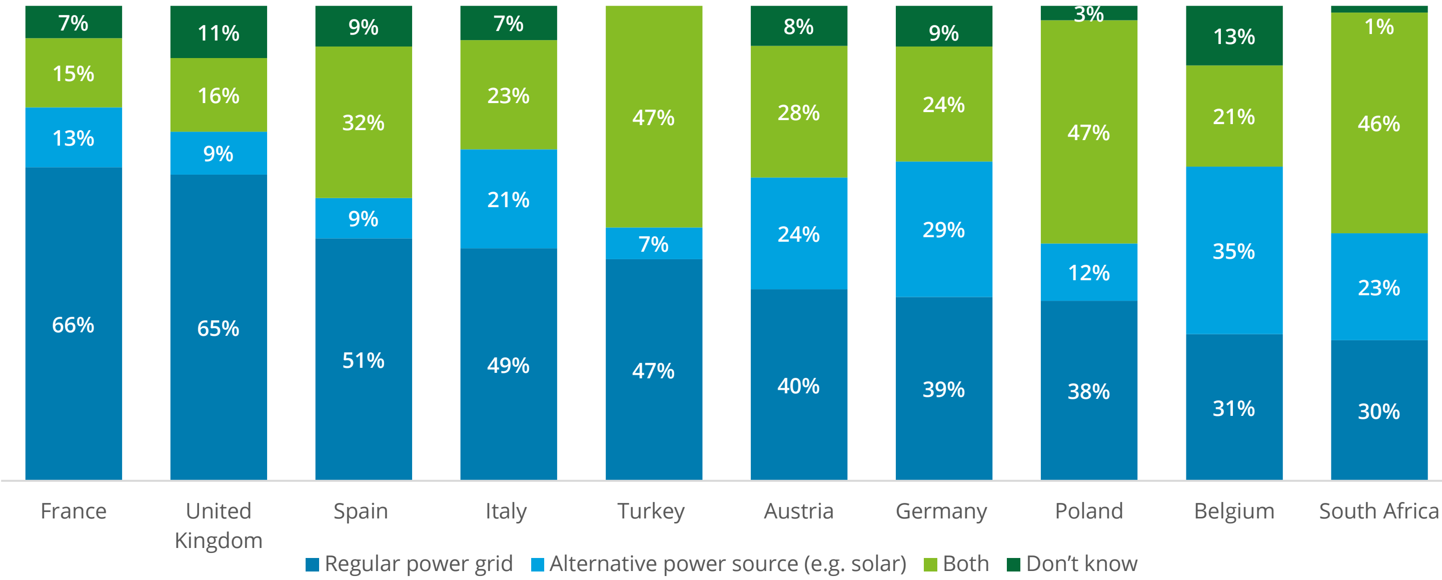
Main reason not to charge an EV at home



Q45: What is the main reason you do not intend to charge your electrified vehicle at home?
Sample size: n= 63 [Austria]; 46 [Belgium]; 55 [France]; 78 [Germany]; 134 [Italy]; 85 [Poland]; 30 [South Africa]; 198 [Spain]; 115 [Turkey]; 60 [United Kingdom]

Availability of renewable energy sources is important for EV intenders as questions around grid capacity to support the shift away from fossil fuels remains in some markets.

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= 119 [Austria]; 136 [Belgium]; 103 [France]; 235 [Germany]; 139 [Italy]; 66 [Poland]; 71 [South Africa]; 47 [Spain]; 15 [Turkey]; 200 [United Kingdom]

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

Most preferred way to pay for public EV charging

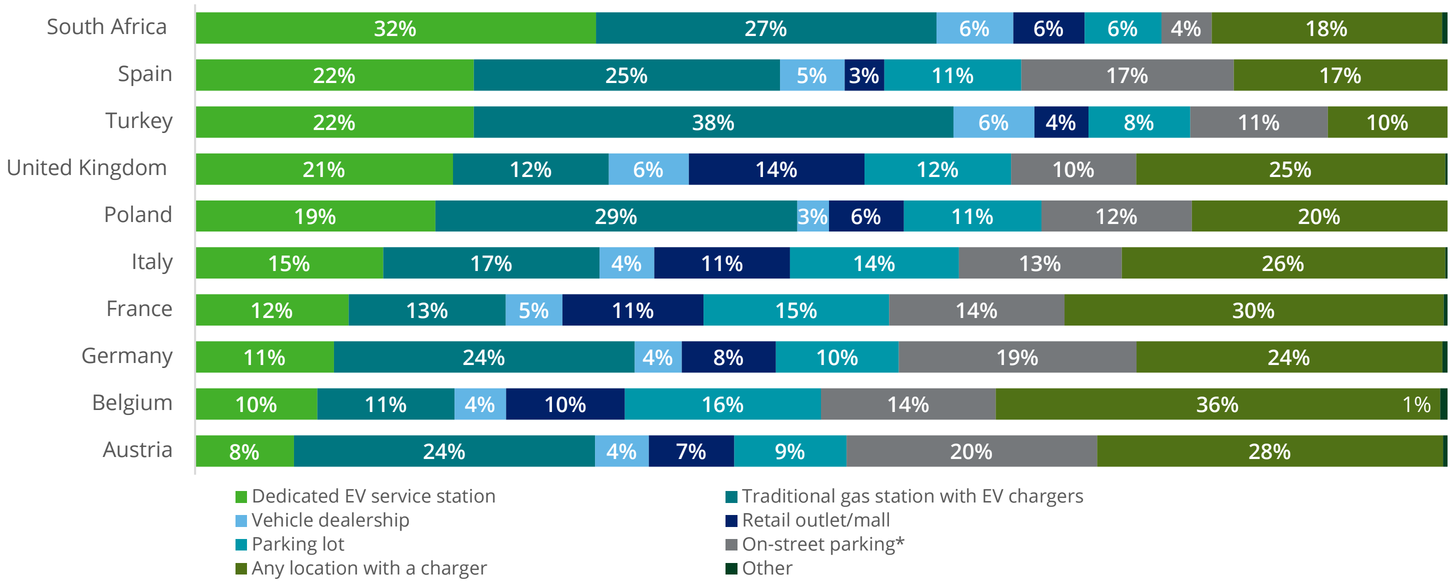
Payment methods	Austria	Belgium	France	Germany	Italy	Poland	South Africa	Spain	Turkey	United Kingdom
Credit/debit card	57%	50%	52%	47%	44%	48%	48%	52%	59%	55%
Smartphone app	25%	28%	19%	40%	29%	31%	32%	27%	27%	26%
Pre-paid subscription plan	5%	12%	16%	7%	18%	7%	14%	9%	10%	10%
Loyalty points	11%	8%	13%	5%	8%	13%	6%	10%	5%	8%
Other	3%	1%	0%	1%	1%	1%	0%	1%	0%	1%

Most preferred mode of payment

Q49: How would you most prefer to pay for public EV charging?
Sample size: n= 279 [Austria]; 337 [Belgium]; 310 [France]; 478 [Germany]; 526 [Italy]; 318 [Poland]; 228 [South Africa]; 502 [Spain]; 417 [Turkey]; 563 [United Kingdom]

When forced to charge on the go, most of the surveyed consumers showed a strong inclination towards traditional gas stations with EV charging facility, however a significant proportion also leaned towards wanting access to chargers when they need it regardless of location.

Expecting to charge electrified vehicle most often at…



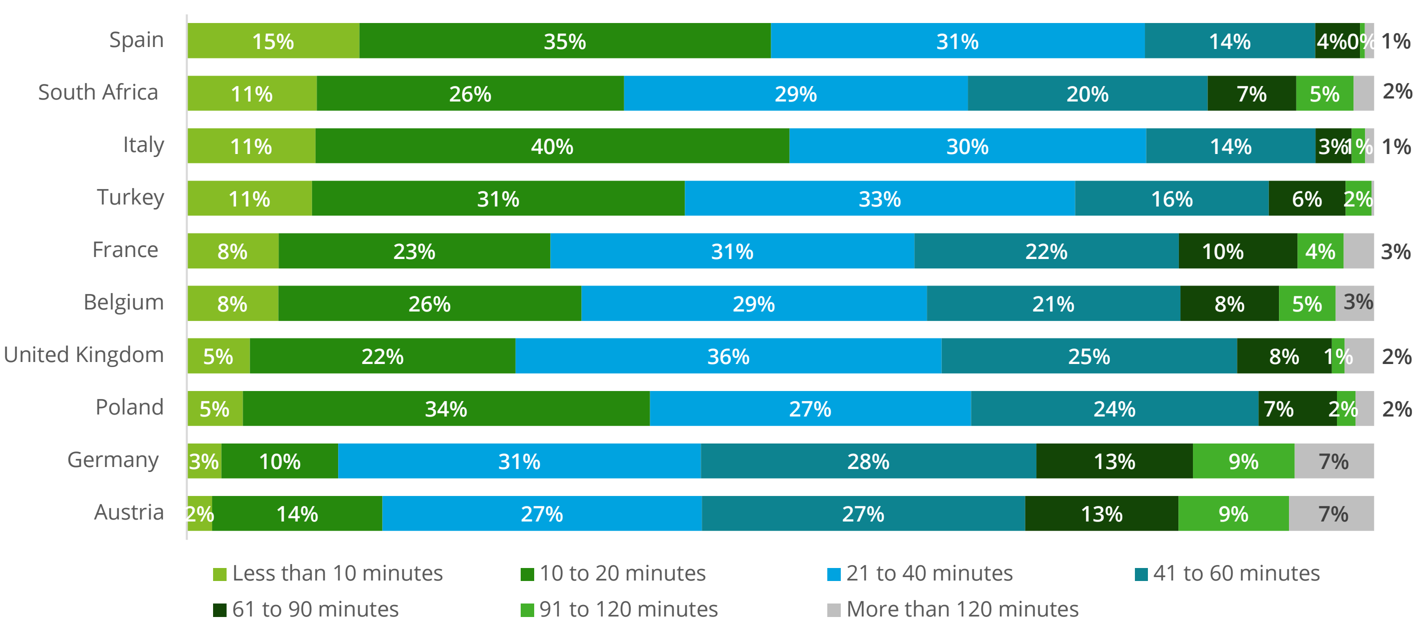
*On-street parking includes community/public buildings, hotels, etc.

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

Sample size: n= 279 [Austria]; 337 [Belgium]; 310 [France]; 478 [Germany]; 526 [Italy]; 318 [Poland]; 228 [South Africa]; 502 [Spain]; 417 [Turkey]; 563 [United Kingdom]

The assumption that EV charge time need to be on par with fossil fuel fill-ups maybe somewhat overstated as consumers in EMEA markets are willing to wait for longer than 20 minutes to recharge their EVs.

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= 279 [Austria]; 337 [Belgium]; 310 [France]; 478 [Germany]; 526 [Italy]; 318 [Poland]; 228 [South Africa]; 502 [Spain]; 417 [Turkey]; 563 [United Kingdom]

With consumers willing to spend a significant amount of time at charging stations, service providers should focus on providing amenities such as Wi-Fi connectivity, beverages, and toilet facilities.

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

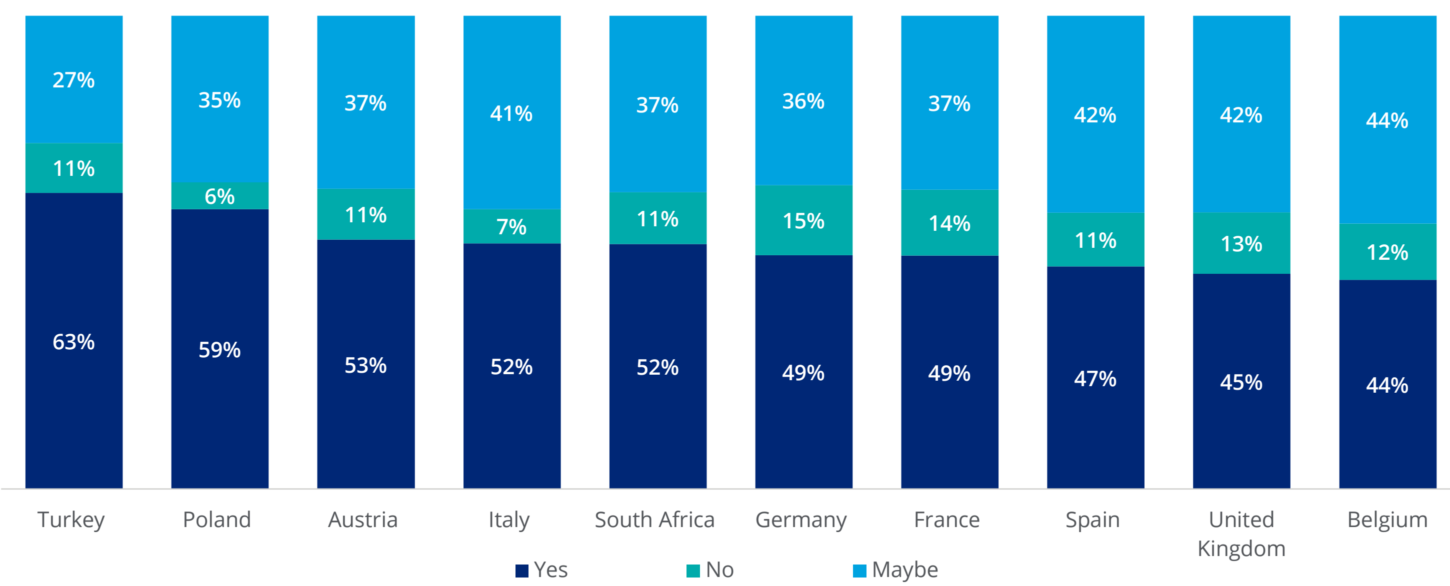
Amenities	Austria	Belgium	France	Germany	Italy	Poland	South Africa	Spain	Turkey	United Kingdom
Wi-Fi connectivity	54%	59%	52%	60%	54%	55%	84%	55%	60%	55%
Washrooms	63%	61%	55%	61%	50%	77%	50%	67%	60%	56%
Coffee / beverages	63%	54%	55%	55%	65%	75%	76%	66%	77%	64%
Snacks / light meals	34%	37%	31%	35%	34%	53%	68%	41%	60%	43%
Lounge / sitting area	34%	23%	18%	30%	19%	45%	54%	23%	58%	42%
Full-service restaurant	24%	21%	29%	23%	24%	28%	49%	35%	45%	21%
Private meeting room	6%	5%	4%	5%	6%	4%	17%	9%	11%	7%

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= 279 [Austria]; 337 [Belgium]; 310 [France]; 478 [Germany]; 526 [Italy]; 318 [Poland]; 228 [South Africa]; 502 [Spain]; 417 [Turkey]; 563 [United Kingdom]

In a scenario where an environmentally sustainable, synthetic fuel for use in traditional combustion engines was commercially available, a significant number of surveyed EV intenders would rethink their decision.

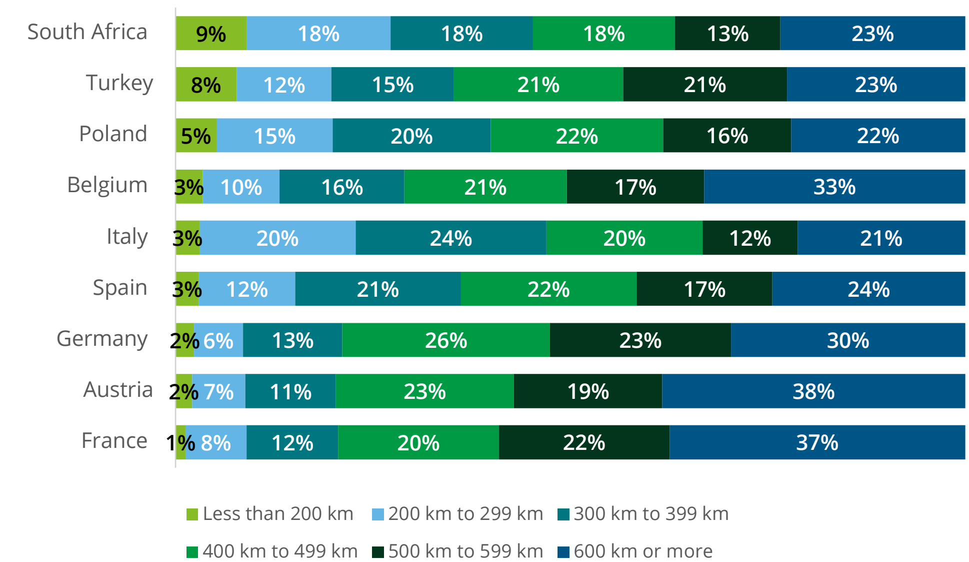
Percentage of consumers who would rethink to purchase an EV if an environmentally sustainable, synthetic fuel alternative is available for traditional (ICE) engines



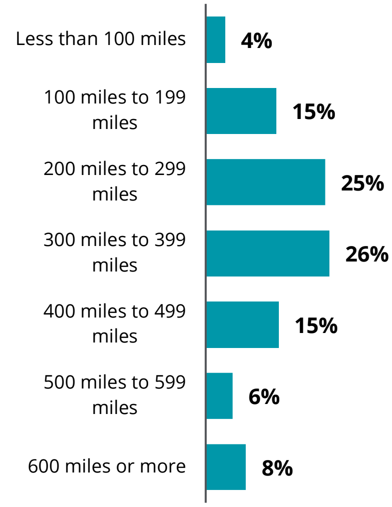
Q42. In a scenario where an environmentally sustainable, synthetic fuel alternative (i.e., carbon-neutral gas) that would work in traditional internal combustion engines was readily available, would you rethink your decision to purchase an EV?
Sample size: n= 279 [Austria]; 337 [Belgium]; 310 [France]; 478 [Germany]; 526 [Italy]; 318 [Poland]; 228 [South Africa]; 502 [Spain]; 417 [Turkey]; 563 [United Kingdom]

Expectations for BEV driving range vary significantly in EMEA markets as one in two surveyed consumer across majority of the EMEA countries want 400 km or more, whereas over one in three consumers in Austria, Belgium and France want 600 km or more to consider acquiring BEV.

Consumer expectations on BEV's driving range



Consumer expectations on BEV's driving range in UK



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= 803 [Austria]; 759 [Belgium]; 801 [France]; 1,103 [Germany]; 824 [Italy]; 889 [Poland]; 966 [South Africa]; 786 [Spain]; 891 [Turkey]; 1,189 [United Kingdom]

With the exception of South Africa where lack of public electric charging infrastructure is top of mind, surveyed consumers are generally concerned about cost/price premium, driving range, and time required to charge.

Greatest concern regarding all battery-powered electric vehicles

Concern	Austria	Belgium	France	Germany	Italy	Poland	South Africa	Spain	Turkey	United Kingdom
Cost/price premium	48%	**61%**	**51%**	44%	35%	44%	45%	50%	27%	**52%**
Driving range	**56%**	53%	49%	**57%**	**51%**	**56%**	41%	45%	42%	47%
Time required to charge	43%	47%	47%	45%	49%	44%	50%	**53%**	**47%**	46%
Lack of public electric vehicle charging infrastructure	42%	45%	40%	47%	43%	42%	**53%**	46%	42%	44%
Lack of charger at home	42%	37%	32%	45%	34%	36%	45%	41%	38%	39%
Cold weather performance	41%	30%	28%	34%	21%	30%	34%	21%	29%	30%
Ongoing charging and running costs	26%	38%	32%	26%	25%	42%	40%	34%	28%	32%
Safety concerns with battery technology	32%	26%	18%	30%	25%	20%	34%	25%	34%	21%
Lack of sustainability (i.e., battery manufacturing/recycling)	47%	26%	32%	32%	19%	17%	33%	24%	29%	25%
Increased need to plan trips	26%	25%	21%	23%	28%	17%	26%	32%	18%	30%
Lack of alternate power source (e.g., solar) at home	34%	26%	24%	26%	19%	25%	41%	25%	28%	22%
Lack of knowledge about EVs/EV technology	16%	15%	15%	13%	15%	14%	33%	18%	20%	20%
Potential for extra taxes/levies associated with BEVs	11%	25%	17%	10%	18%	17%	22%	15%	24%	16%
Uncertain resale value	21%	13%	14%	20%	15%	16%	24%	13%	20%	18%
Lack of choice	11%	11%	10%	13%	7%	10%	13%	9%	14%	15%

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= 871 [Austria]; 853 [Belgium]; 857 [France]; 1,278 [Germany]; 908 [Italy]; 926 [Poland]; 982 [South Africa]; 883 [Spain]; 981 [Turkey]; 1,338 [United Kingdom]

2 Future vehicle intentions

Product quality, vehicle features, and brand familiarity are on top of mind for consumers while making a purchase decision, however in Austria and Germany previous sales experience plays a major role as well.

Most important factors driving the choice of brand for next vehicle

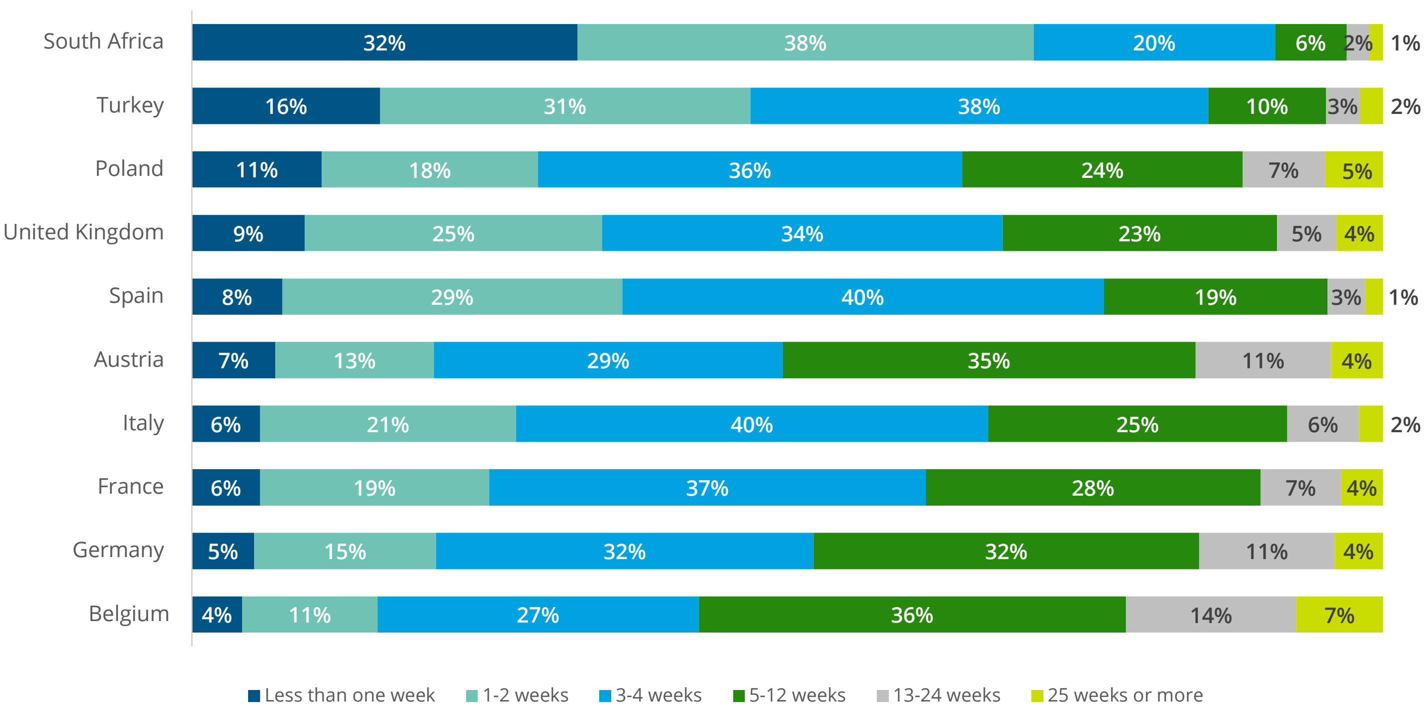
Drivers of brand choice	Austria	Belgium	France	Germany	Italy	Poland	South Africa	Spain	Turkey	United Kingdom
Product quality	54%	60%	66%	54%	64%	65%	75%	67%	68%	57%
Vehicle features	37%	33%	44%	32%	45%	51%	60%	45%	51%	37%
Vehicle performance (e.g., fuel efficiency, battery range)	22%	23%	24%	20%	32%	28%	57%	30%	38%	33%
Quality of overall ownership experience	28%	22%	14%	29%	18%	22%	39%	22%	23%	27%
Brand familiarity	38%	22%	33%	35%	25%	43%	37%	29%	27%	30%
Price	38%	38%	33%	31%	31%	39%	39%	25%	21%	33%
Previous sales experience	43%	31%	24%	40%	27%	21%	17%	16%	21%	19%
Previous service experience	21%	21%	16%	21%	16%	19%	19%	21%	26%	20%
Brand image (i.e., environmentalism, purpose, sustainability)	16%	14%	19%	18%	18%	24%	34%	20%	34%	15%
Availability of battery electric vehicles/hybrid options	10%	11%	11%	12%	19%	10%	21%	17%	21%	14%
Brand advertising	7%	6%	10%	8%	9%	10%	22%	8%	23%	7%
Brand affiliations (e.g., sponsorships, partners)	4%	3%	4%	5%	7%	6%	11%	6%	13%	5%

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= 871 [Austria]; 853 [Belgium]; 857 [France]; 1,278 [Germany]; 908 [Italy]; 927 [Poland]; 982 [South Africa]; 883 [Spain]; 981 [Turkey]; 1,338 [United Kingdom]

The current inventory crisis may be training consumers to expect longer wait times for delivery of a new vehicle.

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= 871 [Austria]; 853 [Belgium]; 857 [France]; 1,278 [Germany]; 908 [Italy]; 926 [Poland]; 982 [South Africa]; 883 [Spain]; 981 [Turkey]; 1,338 [United Kingdom]

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	Austria	Belgium	France	Germany	Italy	Poland	South Africa	Spain	Turkey	United Kingdom
Getting a good deal	72%	60%	49%	66%	42%	59%	36%	37%	33%	64%
Transparent pricing	36%	52%	44%	37%	64%	62%	52%	64%	45%	43%
Physical interaction with the vehicle (i.e., test drive)	42%	36%	39%	36%	31%	38%	49%	38%	40%	43%
Low pressure experience	26%	18%	23%	27%	23%	21%	10%	14%	10%	24%
Getting all my questions answered	39%	41%	39%	33%	27%	30%	36%	34%	40%	29%
Convenient location	18%	15%	12%	25%	20%	23%	13%	17%	15%	32%
To be offered different financing and usage-based models	18%	18%	25%	20%	22%	19%	23%	34%	27%	15%
Making good use of my time	10%	10%	13%	11%	12%	10%	11%	15%	20%	11%
Ability to complete all or some of the process online	7%	8%	10%	11%	12%	8%	14%	11%	17%	12%
Building trust in the salesperson	22%	26%	26%	23%	21%	12%	16%	18%	18%	16%
Having a resource for post-purchase needs	11%	15%	18%	11%	27%	18%	17%	18%	34%	12%

Most commonly cited

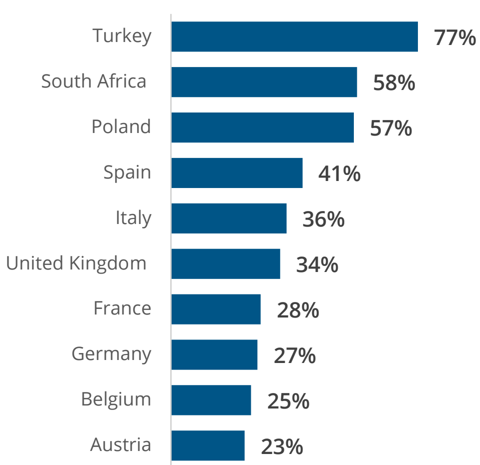
Note: Sum of the percentages exceed 100% as respondents can select multiple options.

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

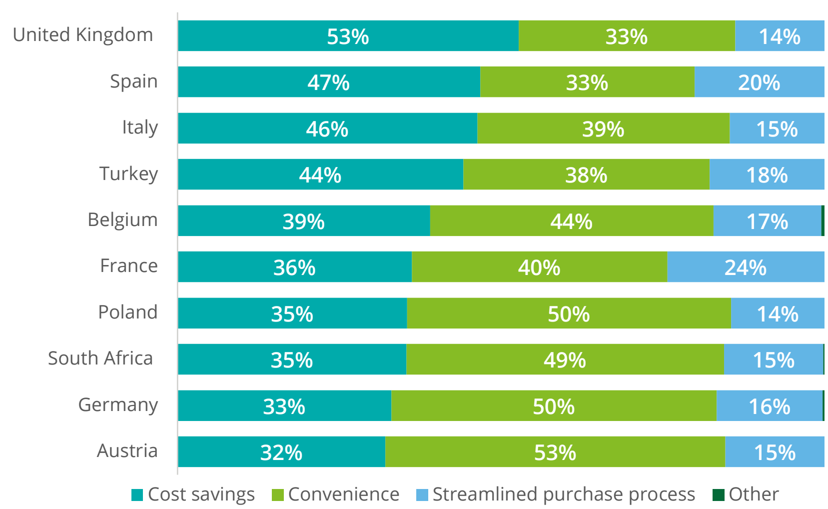
Sample size: n= 871 [Austria]; 853 [Belgium]; 857 [France]; 1,278 [Germany]; 908 [Italy]; 926 [Poland]; 982 [South Africa]; 883 [Spain]; 981[Turkey]; 1,338 [United Kingdom]

As OEMs look at every potential profit pool going forward, including offering their own insurance products, surveyed consumers in several markets are signaling a significant level of interest based on the perception that it will be convenient and cost-effective.

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...



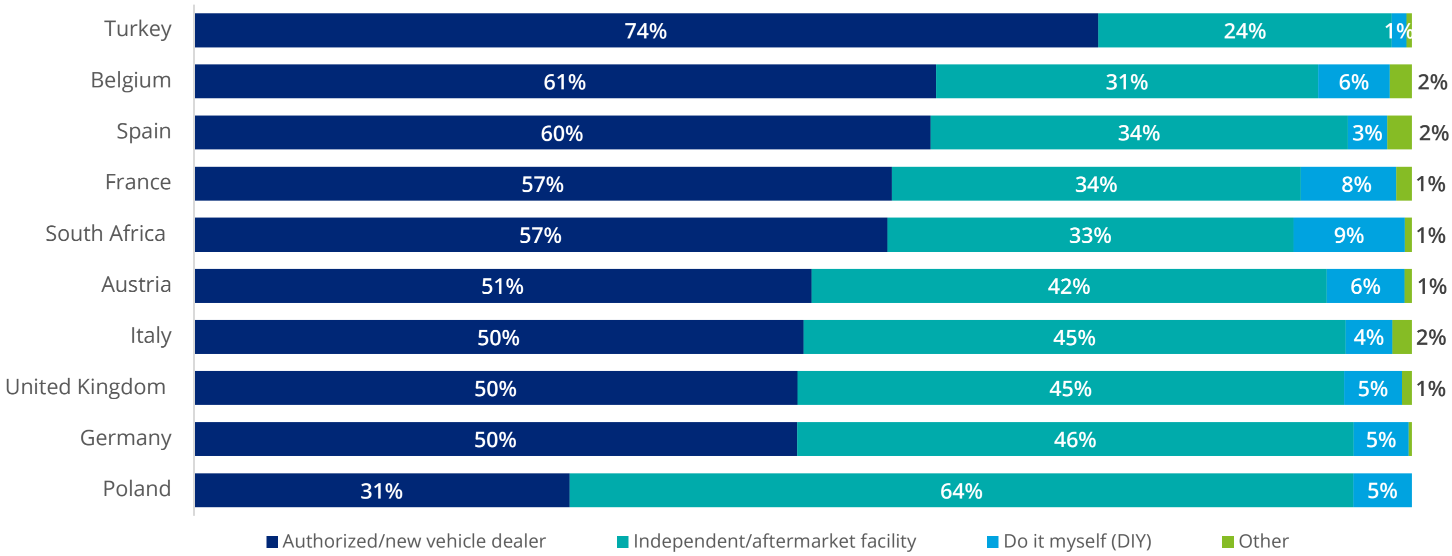
Q60: The next time you acquire a vehicle, how interested would you be in purchasing insurance directly from the vehicle manufacturer?; Q61: What do you expect the primary benefit of buying insurance directly from the manufacturer to be?

Sample size: n for Q60= 871 [Austria]; 853 [Belgium]; 857 [France]; 1,278 [Germany]; 908 [Italy]; 926 [Poland]; 982 [South Africa]; 883 [Spain]; 981 [Turkey]; 1,338 [United Kingdom] ; n for Q61= 196 [Austria]; 210 [Belgium]; 243 [France]; 342 [Germany]; 328 [Italy]; 527 [Poland]; 574 [South Africa]; 359 [Spain]; 756 [Turkey]; 457 [United Kingdom]

3 Vehicle brand and service experience

A preference for new vehicle dealers as primary service providers is more pronounced across all EMEA regions compared to Poland, 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= 832 [Austria]; 832 [Belgium]; 869 [France]; 1,193 [Germany]; 811 [Italy]; 813 [Poland]; 885 [South Africa]; 896 [Spain]; 917 [Turkey]; 1,241 [United Kingdom]

Quality of work and trust are the most important factors for consumers when choosing where to service their vehicle. Cost becomes a key factor for consumers who choose to get their vehicles serviced outside of a dealership.

Reasons for choosing vehicle service provider (by preferred provider)

	Dealer					Aftermarket				
	Cost	Trust	Convenience	Quality of work	Customer experience	Cost	Trust	Convenience	Quality of work	Customer experience
Austria	9%	34%	7%	29%	19%	29%	32%	6%	16%	13%
Belgium	6%	35%	11%	34%	9%	41%	22%	8%	19%	10%
France	17%	30%	7%	35%	10%	32%	23%	5%	32%	8%
Germany	9%	30%	7%	34%	17%	27%	29%	8%	19%	14%
Italy	8%	36%	14%	25%	13%	17%	34%	24%	12%	11%
Poland	5%	39%	18%	25%	12%	28%	33%	9%	20%	9%
South Africa	9%	21%	11%	51%	8%	32%	16%	12%	32%	9%
Spain	7%	46%	11%	26%	9%	22%	40%	11%	20%	7%
Turkey	9%	44%	7%	32%	8%	35%	23%	10%	20%	12%
United Kingdom	10%	25%	17%	30%	14%	24%	25%	19%	20%	12%

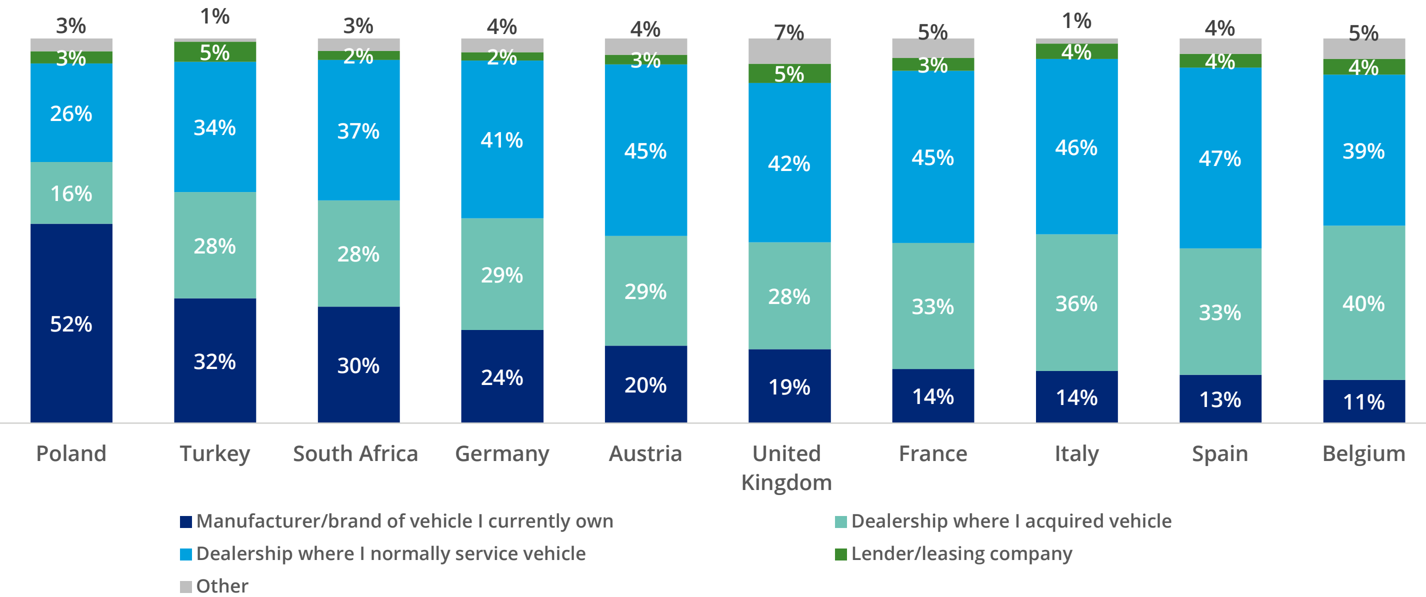
Primary reason for choice

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

Sample size (Dealer): n= 422 [Austria]; 507 [Belgium]; 498 [France]; 591 [Germany]; 406 [Italy]; 251 [Poland]; 504 [South Africa]; 542 [Spain]; 681 [Turkey]; 615 [United Kingdom] ; Sample size (Aftermarket): n= 352 [Austria]; 261 [Belgium]; 292 [France]; 545 [Germany]; 361 [Italy]; 523 [Poland]; 295 [South Africa]; 307 [Spain]; 221 [Turkey]; 557 [United Kingdom]

Consumers across most markets 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= 832 [Austria]; 832 [Belgium]; 869 [France]; 1,193 [Germany]; 811 [Italy]; 813 [Poland]; 885 [South Africa]; 896 [Spain]; 917 [Turkey]; 1,241 [United Kingdom]

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

Important features for a vehicle brand app	Austria	Belgium	France	Germany	Italy	Poland	South Africa	Spain	Turkey	United Kingdom
Learn about your vehicle's features	40%	39%	41%	37%	42%	47%	57%	54%	56%	27%
Schedule service	38%	39%	20%	32%	41%	38%	52%	34%	29%	30%
Make payments	13%	12%	11%	15%	22%	17%	37%	18%	31%	21%
Track service appointments (i.e., cost, timing)	41%	33%	29%	38%	53%	30%	50%	37%	42%	27%
Lock / unlock vehicle	16%	17%	20%	14%	19%	12%	40%	15%	25%	17%
Track your vehicle's location	24%	16%	13%	20%	27%	19%	54%	19%	29%	20%
Locate a dealer	18%	14%	10%	17%	12%	25%	33%	20%	32%	21%
Chat with a live agent	8%	18%	35%	8%	15%	8%	40%	16%	44%	20%
Remote start	6%	5%	6%	6%	8%	8%	17%	8%	16%	9%
Build and price your next vehicle	12%	12%	15%	15%	17%	14%	23%	9%	21%	15%
Purchase accessories	14%	10%	11%	15%	21%	27%	30%	19%	25%	12%
View and add features that enhance my vehicle	13%	14%	15%	13%	12%	12%	26%	22%	35%	12%
View and add battery life	17%	16%	15%	16%	18%	8%	32%	18%	20%	11%
View / redeem loyalty points	6%	5%	4%	7%	8%	5%	21%	12%	21%	8%
Search and pay for public vehicle charging access	8%	6%	5%	11%	12%	6%	13%	8%	15%	7%
Search and pay for public parking	11%	10%	5%	11%	14%	7%	11%	8%	13%	9%

Most commonly cited

Q28. What are the most important features of a vehicle brand app? (Please select all that apply).
Sample size: n= 832 [Austria]; 832 [Belgium]; 869 [France]; 1,193 [Germany]; 811 [Italy]; 813 [Poland]; 885 [South Africa]; 896 [Spain]; 917 [Turkey]; 1,241 [United Kingdom]

4 Connectivity

Majority of the surveyed consumers in EMEA market see benefits in connected vehicles and are interested in features regarding maintenance updates, vehicle health reports, traffic congestion, updates on alternate routes, and road safety.

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

Connected vehicle features	Austria	Belgium	France	Germany	Italy	Poland	South Africa	Spain	Turkey	United Kingdom
Maintenance updates and vehicle health reporting / alerts	57%	60%	**68%**	56%	69%	68%	**82%**	**69%**	85%	56%
Updates regarding traffic congestion and suggested alternate routes	**59%**	**63%**	63%	**58%**	64%	64%	81%	67%	87%	**58%**
Updates to improve road safety and prevent potential collisions	53%	60%	67%	53%	**69%**	**67%**	**82%**	68%	**88%**	53%
Suggestions regarding safer routes (i.e., avoid unpaved roads)	41%	51%	55%	43%	62%	62%	79%	61%	85%	47%
Maintenance cost forecasts based on your driving habits	48%	58%	62%	47%	64%	64%	77%	60%	85%	50%
Customized suggestions regarding ways to minimize service expenses	47%	56%	58%	46%	63%	62%	78%	59%	84%	47%
Over-the-air vehicle software updates that correct or improve your driving experience	36%	45%	56%	37%	55%	63%	72%	53%	83%	41%
Access to nearby parking (i.e., availability, booking, and payment)	46%	45%	52%	51%	59%	60%	68%	64%	82%	48%
Receiving a discount for access to a Wi-Fi connection in your vehicle	32%	39%	42%	38%	44%	54%	71%	51%	82%	39%
Customized/optimized vehicle insurance plan (e.g., "pay how you drive" plans)	46%	49%	52%	46%	60%	59%	70%	60%	82%	38%
Special offers regarding non-automotive products and services related to your journey or destination	27%	29%	35%	32%	42%	47%	61%	48%	77%	34%

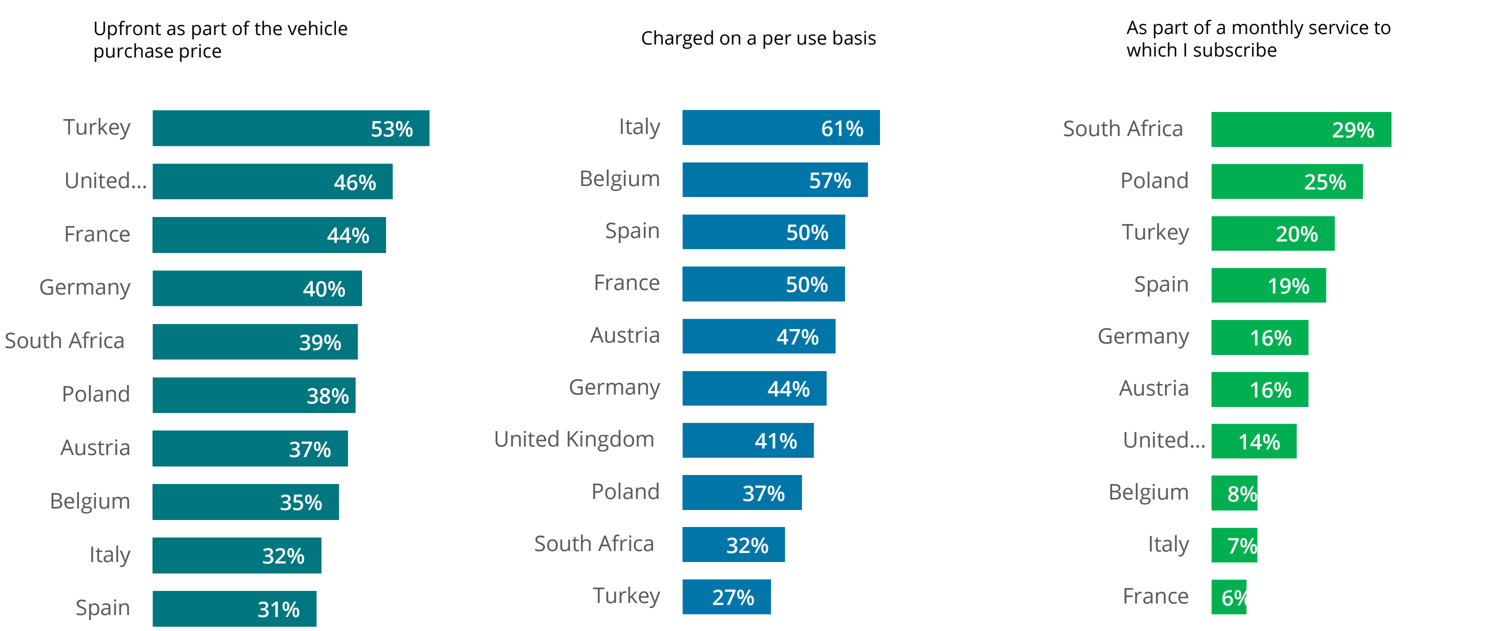
Most commonly cited

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= 871 [Austria]; 853 [Belgium]; 857 [France]; 1,278 [Germany]; 908 [Italy]; 926 [Poland]; 982 [South Africa]; 883 [Spain]; 981 [Turkey]; 1,338 [United Kingdom]

Mobility providers looking to offer subscription services for connected vehicle technologies may find it challenging as most consumers in EMEA 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 = 871 [Austria]; 853 [Belgium]; 857 [France]; 1,278 [Germany]; 908 [Italy]; 926 [Poland]; 982 [South Africa]; 883 [Spain]; 981 [Turkey]; 1,338 [United Kingdom]

About the study

About the study

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

EMEA	Sample
Austria (AT)	1,004
Belgium (BE)	1,019
France (FR)	1,006
Germany (DE)	1,506
Italy (IT)	1,002
Poland (PL)	1,002
South Africa (ZA)	1,014
Spain (ES)	1,009
Turkey (TR)	1,006
United Kingdom (GB)	1,514

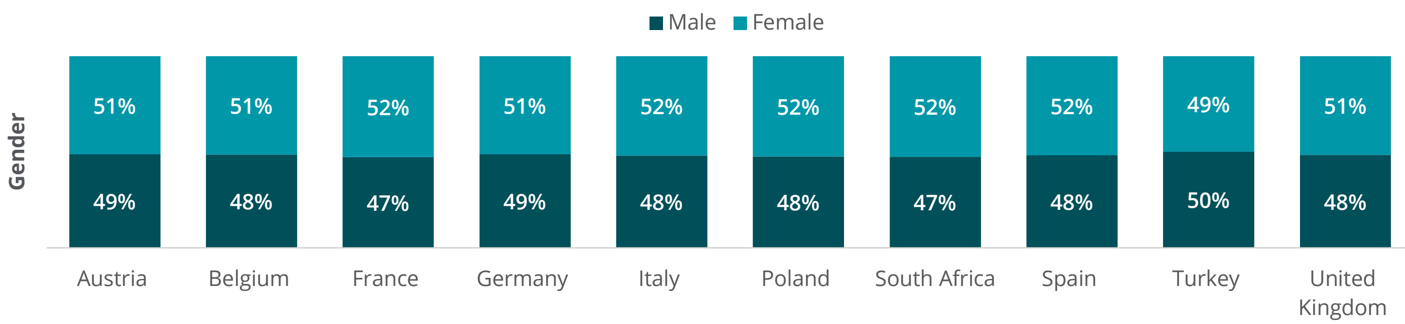
Asia-Pacific	Sample
Australia (AU)	1,005
China (CN)	1,012
India (IN)	1,003
Indonesia (ID)	1,003
Japan (JP)	1,017
Malaysia (MY)	1,006
Philippines (PH)	1,008
Republic of Korea (KR)	1,011
Singapore (SG)	1,003
Thailand (TH)	1,009
Vietnam (VN)	1,019

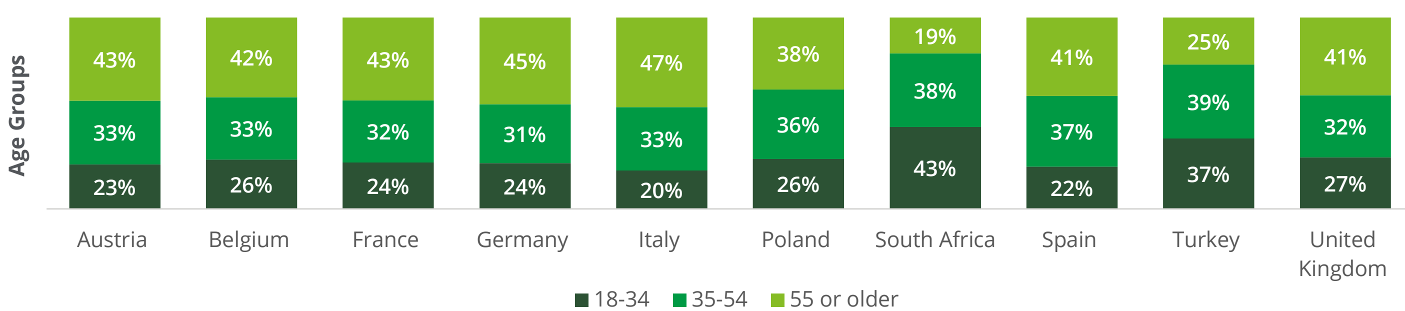
North America	Sample
Canada (CA)	1,011
Mexico (MX)	1,008
United States (US)	2,011

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 Turkey, and Italy is 1%;

Sample size: n= 1,004 [Austria]; 1,019 [Belgium]; 1,006 [France]; 1,506 [Germany]; 1,002 [Italy]; 1,002 [Poland]; 1,014 [South Africa]; 1,009 [Spain]; 1,006 [Turkey]; 1,514 [United Kingdom]

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For more insights and analysis, please click here or scan the QR code.

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