2014
Global Automotive Consumer Study
The changing nature of mobility
Exploring consumer preferences in key markets around the world
Introduction

Forces are changing the mobility landscape, affording consumers more choices than ever before in meeting their transportation needs. For automotive companies, these shifting consumer demands result in a number of complex questions that may ultimately impact their products and how they engage with their customers.

To explore consumers' mobility choices and transportation decisions, Deloitte Touche Tohmatsu Limited (DTTL) fielded a survey in 19 countries. In total, more than 23,000 individuals representing a broad range of cross generational Baby Boomers, Generation X (Gen X), and Generation Y (Gen Y) automotive consumers responded to the survey. This broad and diverse consumer demographic allowed for in-depth analysis through multiple lenses, including generational, socio-economic, gender, and many others.

The objectives of the study centered on understanding the factors influencing consumers' mobility decisions as new transportation models (e.g., car-sharing, etc.) emerge. The study also analyzed the different tradeoffs consumers are willing to accept to own a vehicle, and examined how preferences for powertrains, technology (inside and outside of the vehicle), and lifestyle needs impact consumers' choice in the purchase or lease decision. The study also sought to assess the customer experience and the factors influencing the final vehicle purchase decision.

The following pages highlight the key findings for six of the 19 countries covered in the study, providing perspectives on the consumer mobility trends in both developed and emerging markets, including the United States, Germany, Japan, China, India, and Brazil. These findings form the foundation for an informed dialogue between automakers, dealers, and non-automotive companies working within the industry about the factors that will increasingly impact how consumers around the world choose to get from one place to another.
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<td>19</td>
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</tbody>
</table>
About the Global Automotive Consumer Study

The 2014 Global Automotive Consumer Study focuses on "the changing nature of mobility" and how mobility affects various aspects of the automobile buying and ownership experience. Within the mobility theme, the study examines how alternative powertrains, connected vehicle technology and automation, and the sales channel experience influences the transportation choices of automotive consumers.
The 2014 Global Automotive Consumer Study is based on a survey of over 23,000 consumers in 19 countries.

Three developed and three emerging markets were selected to further analyze and highlight consumer trends and insights. Key findings and insights on the following pages are based on responses from consumers in six focus countries:

- United States
- Germany
- Japan
- China
- India
- Brazil

Participating countries
Global¹ key findings about Gen Y consumers

Globally¹, Gen Y consumers are interested in owning or leasing vehicles, with over 80% in emerging markets expecting to buy in the next five years. A majority of Gen Y consumers think they will be driving an alternative engine in five years and they are willing to pay more for it².

In all countries¹, interest decreases as autonomy increases, but Gen Y consumers in emerging markets are more comfortable with advanced levels of autonomy.

Reasons for not buying: Gen Y feels that high costs and the fact that lifestyle needs can be met by walking and public transportation are the primary factors.

Consumers see the greatest benefits of vehicle technology in improved safety and increased fuel efficiency.

Gen Y consumers want vehicle technologies that:
- Recognize the presence of other vehicles on the road
- Automatically block them from engaging in dangerous driving situations

Over 50% of Gen Y consumers are influenced by friends and family during the purchase process.

¹Six focus countries (including both emerging and developed markets) were used for global analysis: U.S., Germany, Japan, China, India, Brazil.
²Although cost is still a primary motivation.
Why conduct a global automotive study?

As these powerful and dynamic forces continue to take shape, consumer mobility preferences are rapidly evolving.

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<table>
<thead>
<tr>
<th>Description</th>
<th>Hyper-urbanization</th>
<th>Generational views</th>
<th>Connected technology and software</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Impact</strong></td>
<td>Overcrowding, the realities of traffic, and new capabilities enabled by technology are leading to more collaborative approaches to transport. For example, the “sharing economy,” driverless cars, and improved public transportation.</td>
<td>These differing expectations of mobility, along with disruptions of traditional ownership models, will change how original equipment manufacturers (OEMs) engage their customers.</td>
<td>The formerly clear lines—between humans and machines, between ownership and non-ownership, between goods and services—will blur as a result of connectivity and the information generated and used interchangeably by people and machines.</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>In 2006, the world reached a critical midpoint with over half of the world’s population was living in a city. The trend is expected to accelerate, with approximately 70% of the world’s population expected to live in cities by 2050.</td>
<td>Baby Boomers, Gen X, and Gen Y consumers view their mobility needs and preferences differently.</td>
<td>Innovations in Vehicle to Vehicle (V2V) and Vehicle to Infrastructure (V2I) connectivity, mobile phones, apps, and smart card technology are disrupting the automotive industry.</td>
</tr>
<tr>
<td></td>
<td>While Baby Boomers tend to gravitate toward traditional vehicle ownership models, younger generations are highly interested in models that provide access to mobility, allow them to remain connected (and productive), at a reduced cost.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>Description</th>
<th>Convergence of the public and private sectors</th>
<th>Sustainability and environmental concerns</th>
</tr>
</thead>
</table>
| • Automobiles and infrastructure will generate a large amount of digital exhaust that will create both opportunities and challenges for consumers, manufacturers, government, and businesses. Every action taken can be measured and quantified in the connected vehicle of the future.  
• This data provides opportunities for a more integrated and seamless mobility system. | • Government will likely not be able to fully fund nor take primary responsibility for the requirements supporting tomorrow’s transportation systems.  
• The sheer complexity of transportation systems of the future will likely require many players to be involved. | • Continued concerns regarding environmental sustainability and a focus on improving fuel efficiency are leading to ever increasing government targets and expectations in countries around the world such as EU 2020: 60.6 miles per gallon, Japan 2020: 55.1 miles per gallon, and U.S. 2025: 54.5 miles per gallon.²  
• Automakers are being challenged to develop more fuel efficient engines and alternative powertrains to comply with the evolving standards. |
| Impact | • If used correctly, this data could allow for automotive and non-automotive companies to gain insight on the consumer behavior and vehicle performance, as well as identify new potential growth opportunities and/or business models.  
• Because data will be produced across disparate sources, management and integration of the data will be the barrier to optimizing the use of the data. | • The mass adoption and use of new public transportation, electric cars, and autonomous/driverless cars, and the supporting infrastructure requirements is likely to require increased public-private collaborations to address both development costs and ongoing operations. | • In the future, consumers will have the ability to choose from a mix of proven powertrain options that best meet their lifestyle needs and are competitively priced – including more efficient internal combustion engines, electric vehicles (EVs), hybrid electric, and vehicles powered by natural gas. |

Over 80% of Gen Y consumers in emerging markets plan to purchase or lease a vehicle within the next five years.

Percentage of Gen Y consumers who expect to buy a car in the next five years

In China and India alone, 680 million Gen Y consumers plan to buy within five years.

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>India</td>
<td>92%</td>
</tr>
<tr>
<td>China</td>
<td>90%</td>
</tr>
<tr>
<td>Brazil</td>
<td>83%</td>
</tr>
<tr>
<td>United States</td>
<td>80%</td>
</tr>
<tr>
<td>Germany</td>
<td>76%</td>
</tr>
<tr>
<td>Japan</td>
<td>43%</td>
</tr>
</tbody>
</table>

Emerging markets

Developed markets

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1 Estimate using data from the Economist Intelligence Unit (EIU) – Gen Y population (age 20 to 37 years) for India and China is calculated as: Population in the age group of 20 to 35 years + 0.6 X (Population in the age group of 35 to 39 years).
Affordability and needs met by walking / public transportation are top reasons across Gen Y for not owning a vehicle.

**Top three reasons Gen Y does not buy**

<table>
<thead>
<tr>
<th></th>
<th>U.S.</th>
<th>Germany</th>
<th>Japan</th>
<th>China</th>
<th>India</th>
<th>Brazil</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>$</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>2</td>
<td>🔧  🔪</td>
<td>🔧</td>
<td>🔧</td>
<td>🔧</td>
<td>🔧</td>
<td>🔧</td>
</tr>
<tr>
<td>3</td>
<td>✔️</td>
<td>🔧</td>
<td>🔧</td>
<td>✔️</td>
<td>🔧</td>
<td></td>
</tr>
</tbody>
</table>

Gen Y does not buy

Parking is inconvenient, unavailable, or too expensive

Lifestyle needs met by bike or motorized two-wheel vehicle

Environmental concerns

**But is Gen Y even willing to buy?**

Percent of population interested

- **U.S.**
  - Gen Y: 80%
  - Other generations: 83%

- **Germany**
  - Gen Y: 98%
  - Other generations: 92%

- **Japan**
  - Gen Y: 70%
  - Other generations: 65%

- **China**
  - Gen Y: 88%
  - Other generations: 76%

- **India**
  - Gen Y: 84%
  - Other generations: 78%

- **Brazil**
  - Gen Y: 85%
  - Other generations: 76%

Gen Y is more willing and interested in buying than other generations in all countries except the U.S.

What would get Gen Y into a car?

While lower costs and increased fuel efficiency are primary factors in most countries…

…In China and India, parking is also a significant factor – over 50% of Gen Y say more convenient and less costly parking would get them in a car.

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6 For segment of Gen Y respondents that currently do not own or lease a vehicle.
7 Top reason for other generations: Lifestyle needs met by walking / public transit.
Most consumers value low cost, except in China and India, where convenience is most important.

<table>
<thead>
<tr>
<th>Eco-friendly</th>
<th>Low cost</th>
<th>Convenience</th>
<th>Utility</th>
<th>Luxury</th>
<th>Technology</th>
<th>Love to drive</th>
</tr>
</thead>
<tbody>
<tr>
<td>I make green choices in my life. When going somewhere, I want to do so in an eco-friendly manner, even if that means more time and money.</td>
<td>My total cost when going somewhere needs to be low, and I will choose a transportation option that is cheapest.</td>
<td>When going somewhere, I want to do so in the fastest and easiest way and am willing to use any transportation option to achieve this.</td>
<td>I have things to do and getting somewhere needs to fit the demands of my lifestyle. My transportation option must have the functionality to meet these demands (e.g., I require a truck to haul my equipment/tools).</td>
<td>I value luxury and want to be noticed when I go somewhere. I feel a sense of pride driving a luxury vehicle and am willing to pay more for the features and the brand name.</td>
<td>Connected technology is important to me when going somewhere. To do this, my transportation choice needs to be integrated with my electronic devices, and it needs to access, consume, and create information.</td>
<td>I look forward to driving because getting there is half the fun.</td>
</tr>
</tbody>
</table>

How would you describe yourself as a commuter?

Top two most frequent descriptions consumers used to describe themselves as commuters

<table>
<thead>
<tr>
<th>Ranking</th>
<th>United States</th>
<th>Germany</th>
<th>Japan</th>
<th>China</th>
<th>India</th>
<th>Brazil</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>$</td>
<td>🛠️</td>
<td>$</td>
<td>⚫</td>
<td>⚫</td>
<td>$</td>
</tr>
<tr>
<td>2</td>
<td>🛠️</td>
<td>$</td>
<td>⚫</td>
<td>⚫</td>
<td>📡</td>
<td>⚫</td>
</tr>
</tbody>
</table>

"Low cost" is not a primary factor in China and India.
In all countries except China, Gen Y is not as devoted to the personal car, compared to other generations.

The personal car as a preferred mode of transportation

<table>
<thead>
<tr>
<th>Country</th>
<th>Gen Y</th>
<th>Other generations</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S.</td>
<td>64%</td>
<td>81%</td>
</tr>
<tr>
<td>Germany</td>
<td>62%</td>
<td>71%</td>
</tr>
<tr>
<td>Japan</td>
<td>37%</td>
<td>47%</td>
</tr>
<tr>
<td>China</td>
<td>55%</td>
<td>54%</td>
</tr>
<tr>
<td>India</td>
<td>46%</td>
<td>50%</td>
</tr>
<tr>
<td>Brazil</td>
<td>52%</td>
<td>59%</td>
</tr>
</tbody>
</table>

“I would be willing to give up driving my car even if I had to pay more to travel to where I need to go.”

The U.S. has the largest gap in vehicle ownership loyalty between Gen Y and other generations, but India has the highest abandonment rates.
Factors that may influence consumers' decision to abandon vehicle ownership

**Lifestyle is the primary reason.**

"I would prefer living in a neighborhood that has everything within walking distance."

<table>
<thead>
<tr>
<th>Country</th>
<th>Gen Y</th>
<th>Other generations</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S.</td>
<td>67%</td>
<td>55%</td>
</tr>
<tr>
<td>Germany</td>
<td>53%</td>
<td>49%</td>
</tr>
<tr>
<td>Japan</td>
<td>58%</td>
<td>56%</td>
</tr>
<tr>
<td>China</td>
<td>64%</td>
<td>76%</td>
</tr>
<tr>
<td>India</td>
<td>68%</td>
<td>73%</td>
</tr>
<tr>
<td>Brazil</td>
<td>64%</td>
<td>75%</td>
</tr>
</tbody>
</table>

Over half of all consumers prefer to have everything within walking distance.

While this idea seems to be more popular with Gen Y in developed markets...

...Gen Y in emerging markets care less about living in a convenient neighborhood, compared to other generations.

Note: "Strongly Agree" and "Agree" responses have been summed up together.
Gen Y consumers are more interested in alternative transportation modes and transportation apps, particularly in emerging markets, although there is some concern for safety.

Percentage of Gen Y respondents that agree with the following statements:

- Worry about safety, security, or privacy when ride-sharing: 32% (U.S.), 64% (Germany), 66% (China), 53% (India), 49% (Brazil), 57% (Japan)
- Like using a smartphone app to plan transport: 47% (U.S.), 48% (Germany), 69% (China), 39% (India), 69% (Brazil), 40% (Japan)
- Use car rental services if they were easily available: 40% (U.S.), 39% (Germany), 61% (China), 23% (India), 32% (Brazil), 60% (Japan)
- Travel by bus, train, or taxi so that they can multi-task: 38% (U.S.), 40% (Germany), 60% (China), 54% (India), 39% (Brazil), 39% (Japan)
- Would try a ride-sharing app, if it was recommended by family or friends: 35% (U.S.), 16% (Germany), 39% (China), 62% (India), 50% (Brazil), 62% (Japan)

In all six countries, Gen Y consumers are more open to using transportation apps on their smartphones, and are also more open to peer recommendations, compared to other generations.
Except in Germany, a majority of Gen Y expect to be driving an alternative engine in the next five years.

**Hybrid electric** is the predominant choice for Gen Y in the U.S., Germany, Japan, China and Brazil, but **compressed natural gas** is the top choice in India.

### Top alternative engines

**U.S.**
- Hybrid electric (not plug-in): 27%
- Plug-in hybrid electric: 7%
- Compressed natural gas-powered: 7%
- All battery-powered electric: 7%
  - 6% diesel
  - 41% gasoline

**Germany**
- Hybrid electric (not plug-in): 56%
- Plug-in hybrid electric: 44%
  - 28% diesel
  - 28% gasoline

**Japan**
- Hybrid electric (not plug-in): 48%
- Plug-in hybrid electric: 52%
  - 3% diesel
  - 45% gasoline

**China**
- Hybrid electric (not plug-in): 60%
- Plug-in hybrid electric: 40%
- Compressed natural gas-powered: 7%
  - 4% diesel
  - 36% gasoline

**India**
- Hybrid electric (not plug-in): 55%
- Plug-in hybrid electric: 45%
- All battery-powered electric: 8%
  - 25% diesel
  - 20% gasoline

**Brazil**
- Hybrid electric (not plug-in): 64%
- Plug-in hybrid electric: 36%
- Fuel cell electric vehicle (FCEV): 5%
  - 8% diesel
  - 28% gasoline

*Includes gasoline and diesel-powered engines*
Gen Y is *willing to pay more* for an alternative powertrain.

<table>
<thead>
<tr>
<th>Gen Y</th>
<th>U.S.</th>
<th>Germany</th>
<th>Japan</th>
<th>China</th>
<th>India</th>
<th>Brazil</th>
</tr>
</thead>
<tbody>
<tr>
<td>Willing to pay more for alternative engines</td>
<td>65%</td>
<td>73%</td>
<td>69%</td>
<td>71%</td>
<td>85%</td>
<td>72%</td>
</tr>
<tr>
<td>Willing to pay more than US$2,000</td>
<td>38%</td>
<td>41%</td>
<td>29%</td>
<td>27%</td>
<td>53%</td>
<td>43%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other generations</th>
<th>U.S.</th>
<th>Germany</th>
<th>Japan</th>
<th>China</th>
<th>India</th>
<th>Brazil</th>
</tr>
</thead>
<tbody>
<tr>
<td>Willing to pay more for alternative engines</td>
<td>47%</td>
<td>56%</td>
<td>66%</td>
<td>65%</td>
<td>76%</td>
<td>64%</td>
</tr>
<tr>
<td>Willing to pay more than, US$2,000</td>
<td>27%</td>
<td>32%</td>
<td>33%</td>
<td>24%</td>
<td>42%</td>
<td>35%</td>
</tr>
</tbody>
</table>
A majority of consumers feel *there are not enough alternative powertrain options* in the market...

Percentage of Gen Y consumers that agree *“Manufacturers do not offer enough alternative fuel engines”* in vehicles I would actually want to drive.

![Percentage of Gen Y consumers that agree](image)

And consumers in all focus countries *prefer a range of engine options* over a specialized line of vehicles.

![Percentage of consumers preferring](image)

9 Preference of consumers across all generations
Globally, over half of the consumers *support government standards and incentives to switch to alternative powertrains*...

“I would support more *government programs that reward consumers* who switch to or own vehicles with alternative fuel engines and/or high fuel efficiency engines.”

“I would support more *government standards* that require manufacturers to produce vehicles that have better fuel efficiency.”

...But in all countries except the U.S., *Gen Y is generally less supportive* of government programs and regulations, compared to other generations.
Gen Y consumers believe *there are significant benefits from new vehicle technologies.*

**Greatest benefits**

- Vehicles that do not crash
- Vehicles that use alternative fuels

*as the greatest benefits*

**Other benefits**

- Driverless vehicles
- Fully-connected vehicles
- Micro-cars

Gen Y also sees significant benefits in

- 49% China
- 64% India
- 52% Brazil

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**Gen Y wants:**

- Technology that recognizes the presence of other vehicles on the road
- In-vehicle technologies that would automatically block them from engaging in dangerous driving situations

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10 Highest percent of respondents indicating they expect significant benefits from these automotive technologies.
Consumers desire *safety technologies* more than *cockpit technologies*...

And consumers in *emerging markets* have a *greater interest in vehicle technologies overall*, compared to *developed markets*.

But consumers, especially in developed countries, *are not willing to pay much*.

Willing to pay US$2,500 or more for all in-vehicle technologies
In general, consumers today find *higher levels of automation less desirable*...

But *emerging markets are more open to autonomous vehicles.*

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**U.S. federal government definitions for autonomous (driverless) vehicles**

- **Basic**: Allows the vehicle to assist the driver by performing specific tasks like anti-lock braking (prevent from skidding) and/or traction control (to prevent loss of grip with the road).

- **Advanced**: Combines at least two functions such as adaptive cruise control and lane centering technology in unison to relieve the driver of control of those functions.

- **Limited self-driving**: Allows the vehicle to take over all driving functions under certain traffic and environmental conditions. If conditions changed, the vehicle would recognize this and the driver would then be expected to be available to take back control of the vehicle.

- **Full self-driving**: Allows the vehicle to take over all driving functions for an entire trip. The driver would simply need to provide an address and the vehicle would take over and require no other involvement from the driver.

Consumers in **China** spend the most time researching, with roughly *three quarters* spending *10 hours or more.*

**Time spent researching possible vehicles**

Consumers in **India** and **Brazil** consider the most brands when purchasing or leasing, while consumers in **Japan** consider the fewest – only 10% consider five or more brands.
### Impacting the purchase decision

**Gen Y trusts the opinions of their family and friends.**

<table>
<thead>
<tr>
<th>Information sources when purchasing / leasing</th>
<th>Ranking(^1)</th>
<th>United States</th>
<th>Germany</th>
<th>Japan</th>
<th>China</th>
<th>India</th>
<th>Brazil</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family and friends</td>
<td>1</td>
<td><img src="image1" alt="United States" /></td>
<td><img src="image2" alt="Germany" /></td>
<td><img src="image3" alt="Japan" /></td>
<td><img src="image4" alt="China" /></td>
<td><img src="image5" alt="India" /></td>
<td><img src="image6" alt="Brazil" /></td>
</tr>
<tr>
<td>Car reviews on independent websites</td>
<td>2</td>
<td><img src="image2" alt="United States" /></td>
<td><img src="image3" alt="Germany" /></td>
<td><img src="image4" alt="Japan" /></td>
<td><img src="image5" alt="China" /></td>
<td><img src="image6" alt="India" /></td>
<td><img src="image7" alt="Brazil" /></td>
</tr>
<tr>
<td>Manufacturer websites</td>
<td>3</td>
<td><img src="image3" alt="United States" /></td>
<td><img src="image4" alt="Germany" /></td>
<td><img src="image5" alt="Japan" /></td>
<td><img src="image6" alt="China" /></td>
<td><img src="image7" alt="India" /></td>
<td><img src="image8" alt="Brazil" /></td>
</tr>
<tr>
<td>News articles/ media reviews</td>
<td>4</td>
<td><img src="image4" alt="United States" /></td>
<td><img src="image5" alt="Germany" /></td>
<td><img src="image6" alt="Japan" /></td>
<td><img src="image7" alt="China" /></td>
<td><img src="image8" alt="India" /></td>
<td><img src="image9" alt="Brazil" /></td>
</tr>
<tr>
<td>Salesperson at the dealership</td>
<td>5</td>
<td><img src="image5" alt="United States" /></td>
<td><img src="image6" alt="Germany" /></td>
<td><img src="image7" alt="Japan" /></td>
<td><img src="image8" alt="China" /></td>
<td><img src="image9" alt="India" /></td>
<td><img src="image10" alt="Brazil" /></td>
</tr>
<tr>
<td>Social networking sites</td>
<td>6</td>
<td><img src="image6" alt="United States" /></td>
<td><img src="image7" alt="Germany" /></td>
<td><img src="image8" alt="Japan" /></td>
<td><img src="image9" alt="China" /></td>
<td><img src="image10" alt="India" /></td>
<td><img src="image11" alt="Brazil" /></td>
</tr>
</tbody>
</table>

\(^1\) Based on the percent of respondents indicating this source is a significant impact on the purchase decision.

Consumers in the **emerging markets** are more heavily influenced by many information sources.
9 out of 10 U.S. consumers want an extremely efficient purchase process... while consumers in other countries are slightly less demanding.

In India, only 7 out of 10 consumers want an extremely efficient purchase process.

Average acceptable time per phase for all consumers

<table>
<thead>
<tr>
<th>Phase</th>
<th>U.S.</th>
<th>India</th>
</tr>
</thead>
<tbody>
<tr>
<td>Getting information from dealerships</td>
<td>37 minutes</td>
<td>48 minutes</td>
</tr>
<tr>
<td>Waiting to test drive a vehicle</td>
<td>28 minutes</td>
<td>45 minutes</td>
</tr>
<tr>
<td>Processing paperwork and registration</td>
<td>39 minutes</td>
<td>57 minutes</td>
</tr>
<tr>
<td>Processing financing</td>
<td>38 minutes</td>
<td>62 minutes</td>
</tr>
<tr>
<td>Performing simple maintenance service</td>
<td>45 minutes</td>
<td>57 minutes</td>
</tr>
</tbody>
</table>

Total difference in average acceptable process time = 81 minutes
Although the sales process may vary by country, consumers in India seem to perceive the best dealership experience, with over 60% saying they are treated fairly and have a positive attitude of dealers.

“Automotive salespeople treat me fairly and with respect.”

“I have a positive attitude towards automotive dealers.”

Only India had more than 50% agreement for both statements – fairness and positive attitude
After-sales service impacts vehicle sales

Across the countries analyzed, **cost** and **quality** of the service bundle influences over **60%** of consumers’ purchase decision.

When choosing a vehicle to purchase or lease, how important to you are each of the following attributes?

- **Free routine maintenance**: 71%
- **Confidence in the dealer’s ability to repair**: 66%
- **Would pay to have a dealer pick up to service vehicle & drop-off loaner**: 44%

When it comes to after-sales services, Gen Y consumers in emerging markets expect more from dealerships.
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