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2021 Global Automotive Consumer Study

EMEA Countries

To learn more about the Global Automotive Consumer Study, visit **www.deloitte.com/autoconsumers**

For over a decade, Deloitte has been exploring automotive consumer behaviours and 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.

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.

2021 Deloitte Global Automotive Consumer Study

From September through October 2020, Deloitte surveyed more than 24,000 consumers in 23 countries to explore opinions regarding a variety of critical issues impacting the automotive sector, including the development of advanced technologies. The overall goal of this annual study is to answer important questions that can help companies prioritize and better position their business strategies and investments. This summary provides insights into countries residing in the EMEA region.

EVs still have a few hurdles to clear

Although the longer-term trend toward EVs appears to be solidifying, consumers may be rethinking ICE as a reliable technology option in the face of near-term uncertainty.

Advanced features come as standard

Fewer consumers see the benefits of increased connectivity. As a result, consumers are generally unwilling to pay even a small premium for connectivity, autonomous or infotainment features.

Hints of an autonomous future?

The appetite for safety features such as blind spot warning, automatic braking and lane departure warnings signal an increasing acceptance of autonomous driving features.

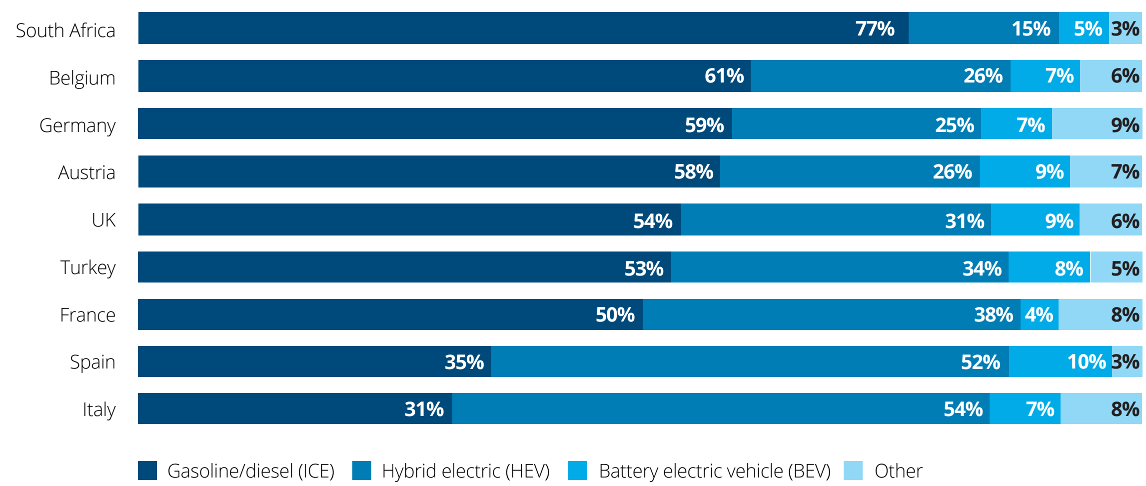
Vehicle sales moving online?

Even though virtual vehicle sales may be here to stay, most consumers would still prefer to acquire their next vehicle in-person at an authorized dealer as some aspects of the buying process remain difficult to digitize.

Vehicle electrification and connectivity

The demand for alternatively fueled vehicles has stalled during the pandemic as consumers may be looking for the comfort of affordable, tried and tested technology in uncertain times.

Consumer powertrain preferences for a consumer's next vehicle



Alternatively fueled vehicles YoY

	2020	2021
South Africa	38%	23% ▼
Belgium	48%	39% ▼
Germany	51%	41% ▼
Austria	47%	42% ▼
UK	52%	46% ▼
Turkey	50%	47% ▼
France	58%	50% ▼
Spain	68%	65% ▼
Italy	71%	69% ▼

Note: "Other" category includes ethanol, CNG, and hydrogen fuel cell.
Q42. What type of engine would you prefer in your next vehicle?
Sample size: Austria= 850 ; Belgium= 825; France= 867 ; Germany= 779 ; Italy= 808 ; Spain= 916; Turkey= 954 ; United Kingdom= 1,157; South Africa= 895

There are still some significant barriers for electric vehicles to overcome, with driving range and lack of charging infrastructure amongst the top concerns for consumers

Greatest concerns regarding all battery-powered electric vehicles

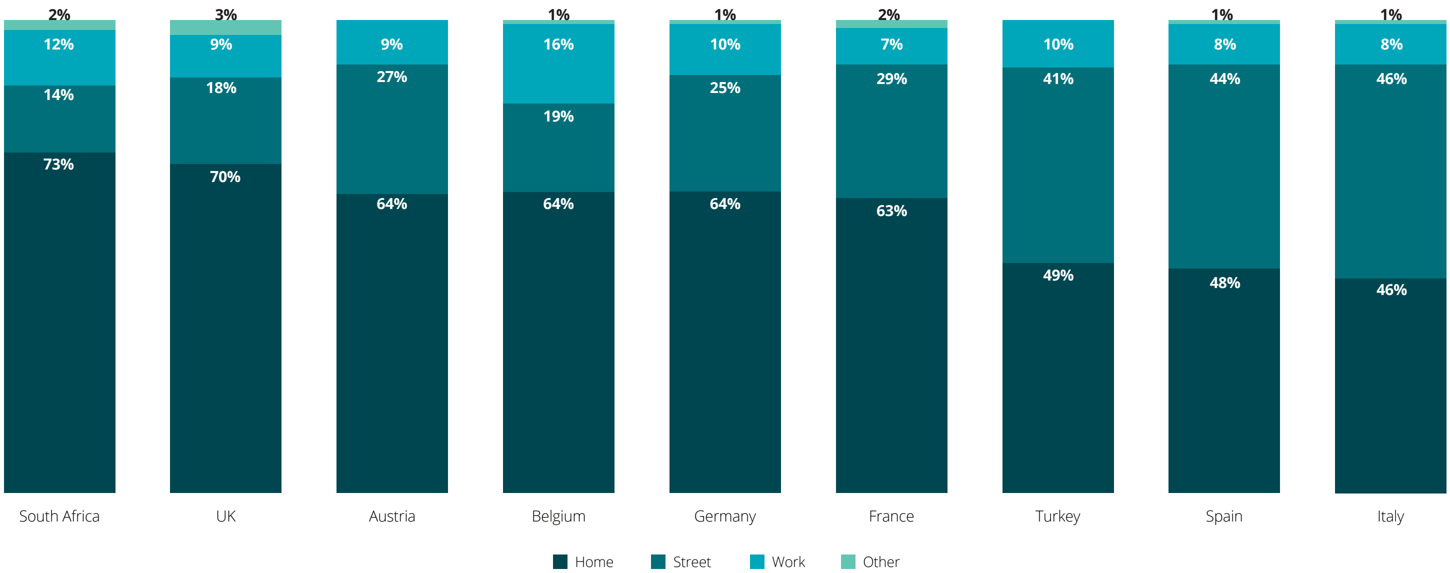
Concern	Austria	Belgium	France	Germany	Italy	Spain	Turkey	UK	South Africa
Driving range	**32%**	27%	**28%**	**28%**	27%	23%	22%	**27%**	15%
Lack of charging infrastructure	19%	19%	21%	22%	**29%**	**31%**	**31%**	25%	**37%**
Cost/price premium	18%	**28%**	26%	16%	13%	19%	9%	22%	16%
Time required to charge	10%	12%	14%	13%	15%	15%	18%	11%	14%
Safety concerns	15%	8%	7%	12%	10%	10%	11%	8%	14%
Lack of choice	2%	3%	2%	5%	5%	2%	9%	6%	3%
Other	4%	3%	2%	4%	1%	0%	0%	1%	1%

Q47: What is your greatest concern regarding all battery-powered electric vehicles?
Sample size: Austria= 850 ; Belgium= 825; France= 867; Germany= 779; Italy= 808; Spain= 916; Turkey= 954; United Kingdom= 1,157; South Africa= 895

Top concern

The majority of consumers expect to charge their EVs at home. However, a significant minority are looking at on-street or at-work charging, highlighting the need for investment in charging infrastructure

Location people expect to charge their electrified vehicle most often



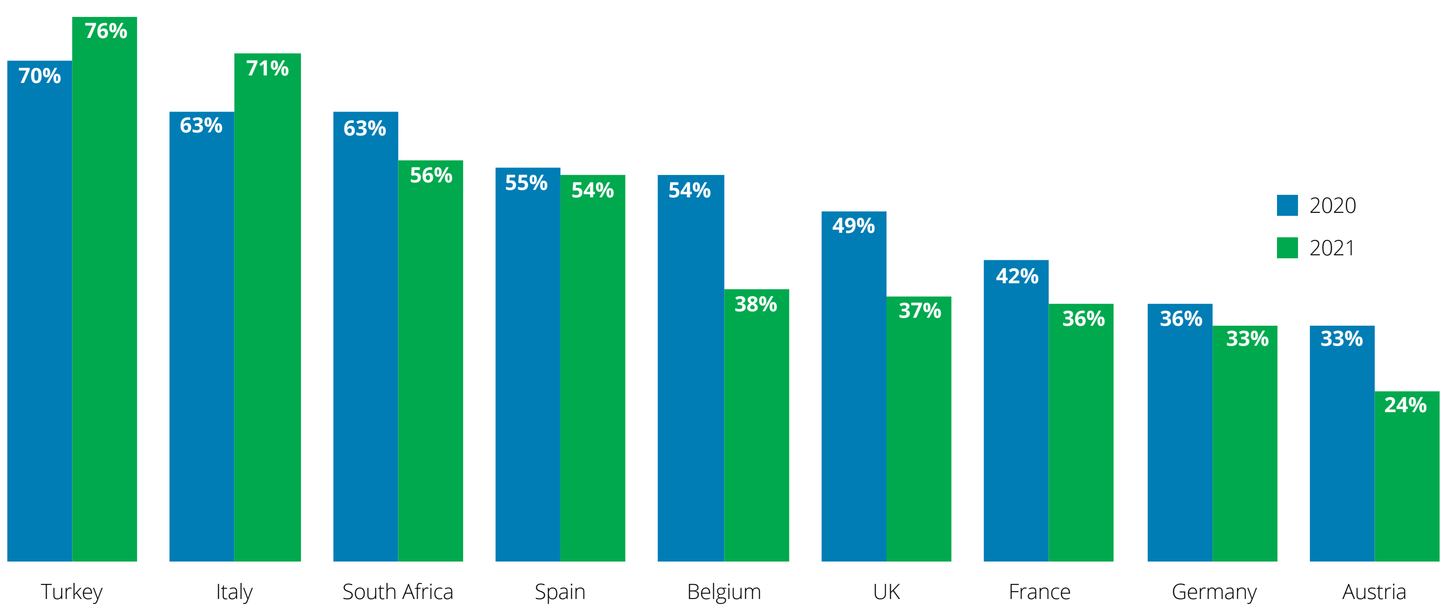
Note: Sum of %s for France, Spain, Italy and South Africa do not add to 100% due to rounding.

Q45: Where do you expect to charge your electrified vehicle most often?

Sample size: Austria= 300 ; Belgium= 273; France= 367; Germany= 246; Italy= 492; Spain= 570; Turkey= 403;United Kingdom= 468; South Africa= 185

Vehicle connectivity is increasing, but the benefits are becoming less clear to consumers over time.

Percentage of consumers who feel that increased vehicle connectivity will be beneficial

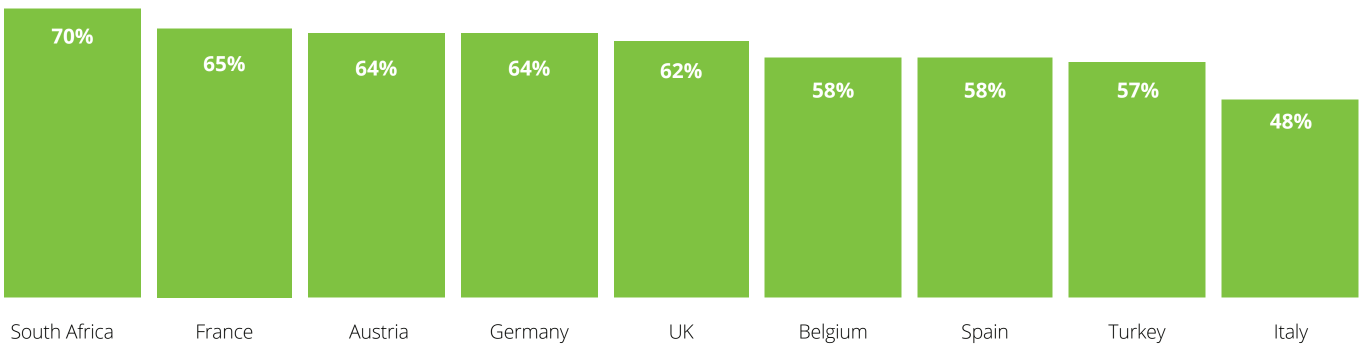


Q3. To what extent do you agree with the following statements regarding future vehicle technology?

Sample size (2021/2020): Austria= 1,015/1,223; Belgium= 1,007/1,224; France= 998/1,173; Germany= 996/2,862; Italy= 1,022/1,246; Spain= 1,012/1,218; Turkey= 1,021/1,247; United Kingdom= 1,445/1,207; South Africa= 1,031/1,238

There are also a significant number of people across the EMEA region who remain concerned about the security and safety of a connected vehicle.

Percentage of consumers who fear someone hacking into their connected car and risking their personal safety (% agree)



Q3. To what extent do you agree with the following statements regarding future vehicle technology?

Sample size: Austria= 1,028; Belgium= 1,014; France= 1,010; Germany= 1,017; Italy= 1,021; Spain= 1,005; Turkey= 1,016; United Kingdom= 1,449; South Africa= 1,025

Safety is the most important advanced feature when people are thinking about their next vehicle. But does the appetite for blind spot warning, automatic braking and lane departure warnings signal an increasing acceptance of autonomous driving features?

Importance (Somewhat/very important) of various vehicles features for next vehicle purchase

Advanced vehicle feature	Austria	Belgium	France	Germany	Italy	Spain	Turkey	UK	South Africa
Blind spot warning/alert	66%	71%	71%	65%	66%	77%	88%	62%	89%
Automatic emergency braking	55%	68%	76%	57%	83%	84%	88%	55%	84%
Lane departure warning	47%	56%	63%	55%	66%	74%	81%	43%	73%
Built-in navigation system	62%	69%	70%	65%	70%	76%	85%	66%	84%
Physical knobs/buttons for controls	52%	60%	61%	55%	58%	67%	76%	54%	62%
360-degree camera system	39%	56%	58%	45%	64%	66%	80%	48%	72%
Automatic/dual zone climate control	47%	51%	63%	45%	64%	61%	77%	48%	60%
Heated/cooled seats	51%	35%	30%	56%	36%	49%	67%	41%	48%
Adaptive cruise control	44%	52%	65%	48%	58%	70%	80%	45%	68%
Electronic parking assist	54%	59%	60%	57%	62%	70%	80%	54%	72%
Built-in WiFi hotspot	26%	34%	43%	31%	48%	55%	71%	39%	62%
Over-the-air software updates	26%	44%	49%	31%	48%	44%	68%	36%	51%
Apple CarPlay/Android Auto interface	31%	32%	34%	31%	48%	48%	64%	30%	49%
Semi-autonomous drive mode	23%	30%	34%	30%	44%	52%	66%	26%	46%

Q26. How important are each of the following features for your next vehicle?

Sample size: Austria= 890; Belgium= 859; France= 887; Germany= 804; Italy= 905; Spain= 936; Turkey= 989; United Kingdom= 1,200; South Africa= 921

Most important

The majority of consumers are unwilling to pay a small premium for safety and connectivity features as they might take it as a given. However, consumers across EMEA are more accepting of the price premium associated with electric and hybrid vehicles.

Percentage of consumers that are unwilling to pay more than ~€400[1] for a vehicle with advanced technologies (including people that would not pay any more)

Advanced techonology category	Austria	Belgium	France	Germany	Italy	Spain	Turkey	UK	South Africa
Safety	65%	73%	78%	64%	62%	58%	47%	71%	55%
Connectivity	78%	81%	81%	74%	72%	69%	54%	76%	56%
Infotainment	86%	86%	85%	79%	77%	76%	62%	82%	68%
Autonomy	68%	73%	73%	66%	55%	58%	42%	68%	48%
Alternative engine solutions	51%	62%	63%	54%	42%	45%	31%	59%	44%
Unwilling to pay more than...	€ 400	€ 400	€ 400	€ 400	€ 400	€ 400	Lira 5,000	£ 400	Rand 8,000

[1] Calculated for each country in local market currency (roughly equivalent to $US500)

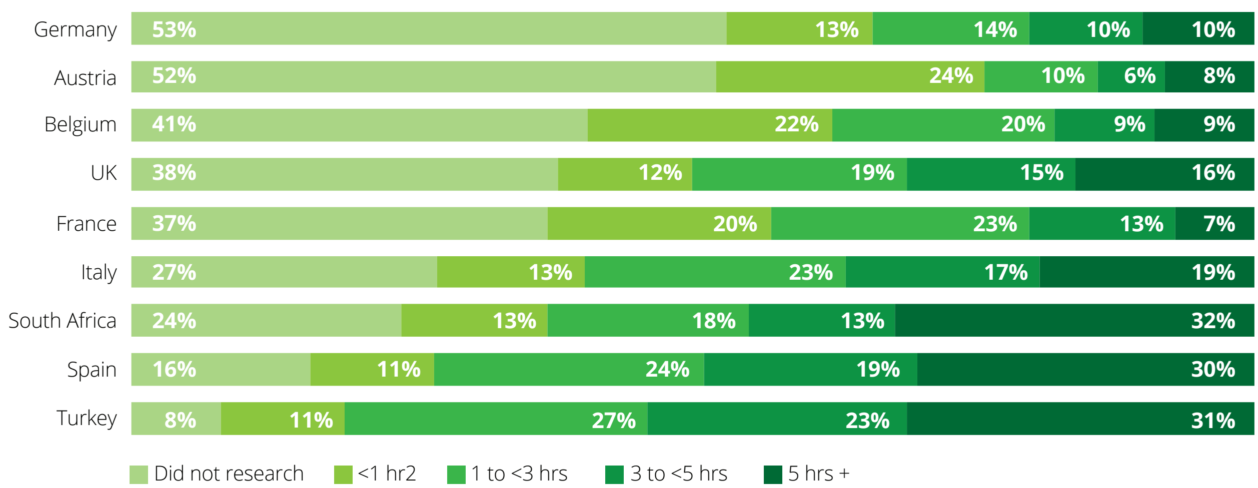
Q4: How much more would you be willing to pay for a vehicle that had each of the technologies listed below?

Sample size: Austria= 983; Belgium= 952; France= 966; Germany= 928; Italy= 969; Spain= 964; Turkey= 990; United Kingdom= 1,341; South Africa= 983

Vehicle financing trends

In general, consumers either did no research or spent less than one hour researching finance options on their current vehicle

Time spent by consumers in researching finance options prior to acquiring their current vehicle



Note: Sum of %s for Belgium and Italy do not add to 100% due to rounding.

Q13: In total, how long did you spend researching finance options prior to acquiring your current vehicle?

Sample size: Austria= 753; Belgium= 609; France= 553; Germany= 746; Italy= 631; Spain= 766; Turkey= 796; United Kingdom= 1,075; South Africa= 725

Flexibility and convenience top the list of the most important characteristics of a vehicle finance account for consumers in the majority of EMEA nations. Consumers in Turkey and South Africa see acceptance based on low credit scores as important. Meanwhile in France, a third of consumers believe that 'all in rates' are the most important

Most important things related to loan/lease/subscription account

Most important characteristic	Austria	Belgium	France	Germany	Italy	Spain	Turkey	UK	South Africa
Flexibility (e.g., early termination)	47%	22%	22%	35%	27%	44%	45%	23%	42%
Convenience	24%	32%	26%	24%	37%	37%	41%	31%	45%
Easy pay process / auto-pay	34%	27%	20%	28%	26%	34%	47%	23%	43%
Access to loan payoff/equity status	22%	14%	13%	18%	11%	26%	43%	13%	33%
Lowest rate for credit rating	41%	28%	29%	26%	33%	37%	53%	23%	56%
Simple web/app account management	19%	12%	14%	13%	13%	17%	25%	17%	29%
Choosing established auto lender brand	16%	16%	13%	15%	36%	19%	46%	19%	41%
All-in rates	39%	16%	32%	34%	13%	20%	40%	21%	29%
Access to live agent on phone	10%	14%	16%	9%	16%	25%	28%	11%	26%
Receiving customized offers	18%	11%	11%	15%	18%	20%	25%	10%	27%
Ability to text message lender	5%	6%	8%	6%	6%	7%	16%	6%	14%

Most important

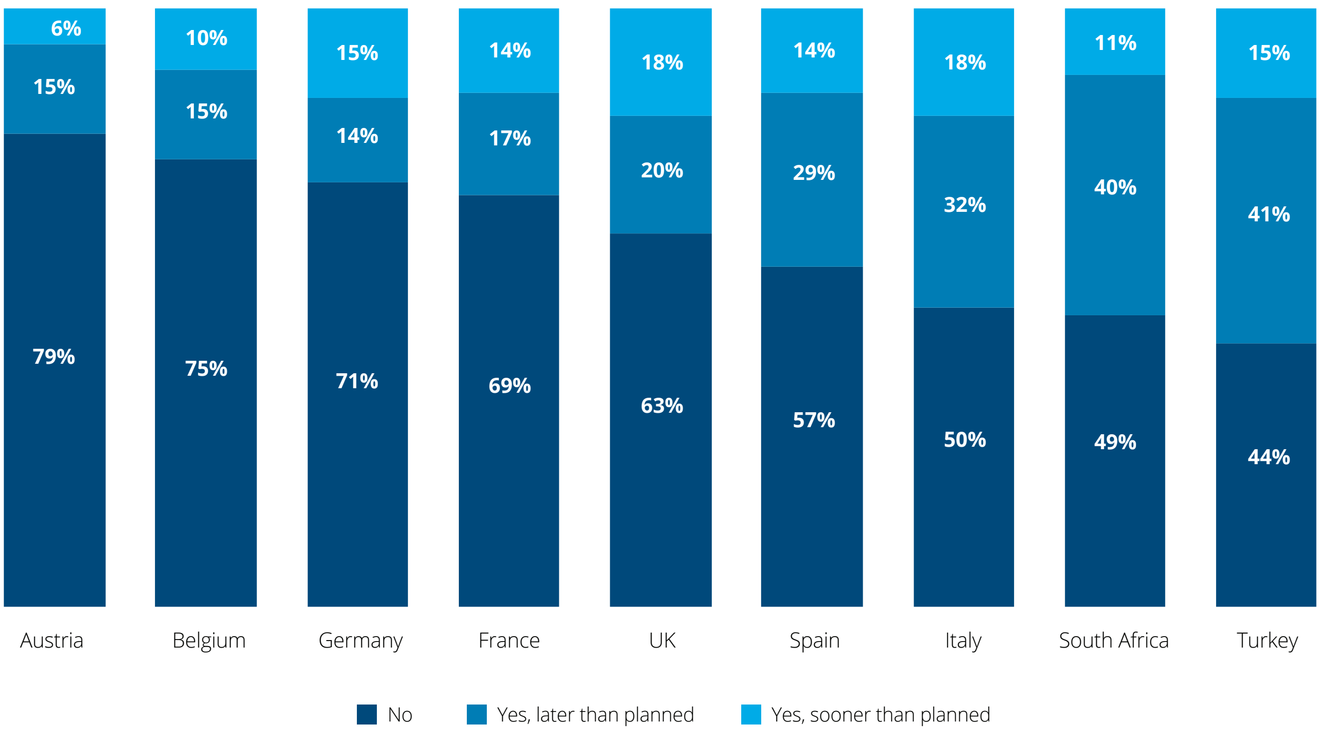
Q14: When it comes to your loan/lease/subscription account, what is most important to you? Please select all that apply.

Sample size: Austria= 753; Belgium= 609; France= 553; Germany= 746; Italy= 631; Spain= 766; Turkey= 796; United Kingdom= 1,075; South Africa= 725

Future vehicle intentions

Despite the disruption caused by COVID-19, a majority of consumers have not altered their timeline for buying a new car. However, the slight delay in demand that is expected will likely have a negative impact on sales

Percentage of consumers who altered their timeline for acquiring next vehicle because of the COVID-19 pandemic



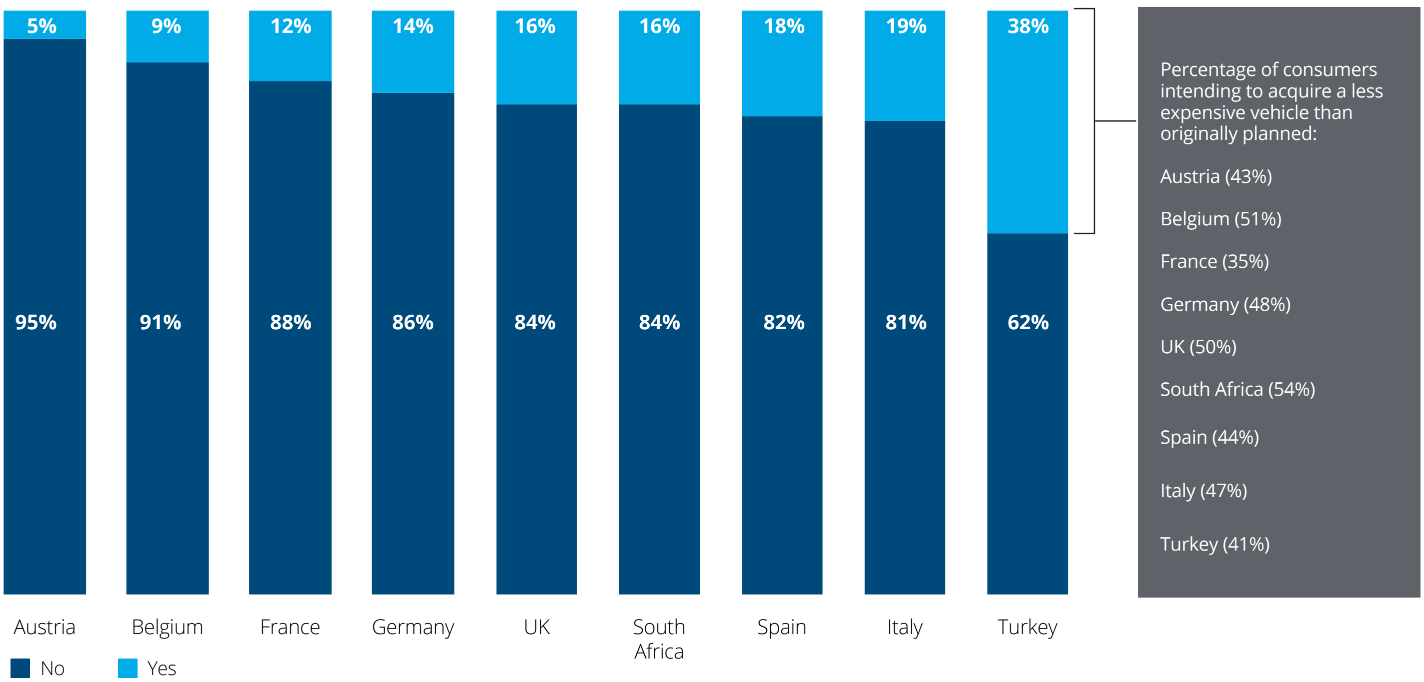
Note: Sum of %s for UK do not add to 100% due to rounding.

Q23. Have you altered your timeline for acquiring your next vehicle because of the COVID-19 pandemic?

Sample size: Austria= 890; Belgium= 859; France= 887; Germany= 804; Italy= 905; Spain= 936; Turkey= 989; United Kingdom= 1,200; South Africa= 921

In most markets the pandemic has caused only a small number of consumers to reconsider the cost of the next vehicle they plan to buy

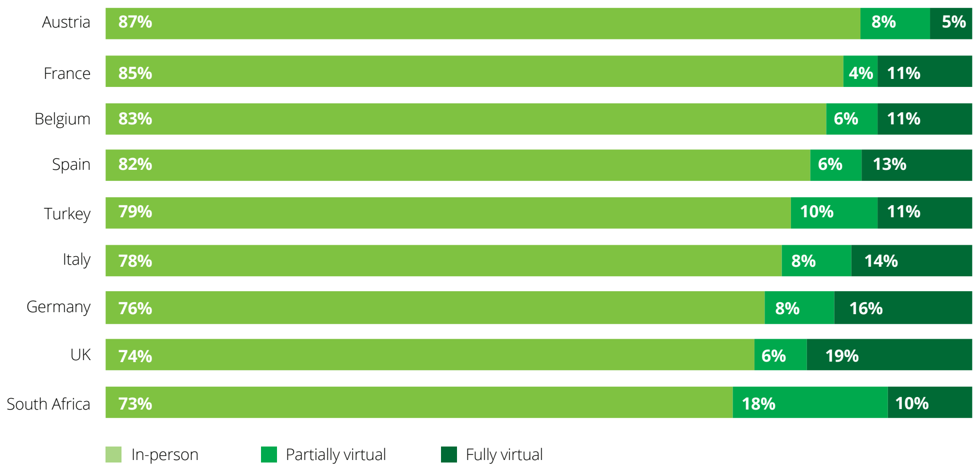
Has COVID-19 caused you to change your mind regarding what type of vehicle you would most like to acquire next?



Q30. Has the COVID-19 pandemic caused you to change your mind regarding what type of vehicle you would most like to acquire next?
Sample size: Austria= 890; Belgium= 859; France= 887; Germany= 804; Italy= 905; Spain= 936; Turkey= 989; United Kingdom= 1,200; South Africa= 921`

COVID-19 restrictions have forced the auto industry to accelerate online and click and collect strategies. In the UK and Germany, a quarter of consumers would prefer to buy their next vehicle through a partial or fully virtual experience. The question is whether this trend will continue post COVID-19 when public health concerns associated with visiting a showroom in person have eased?

Most preferred way to acquire next vehicle

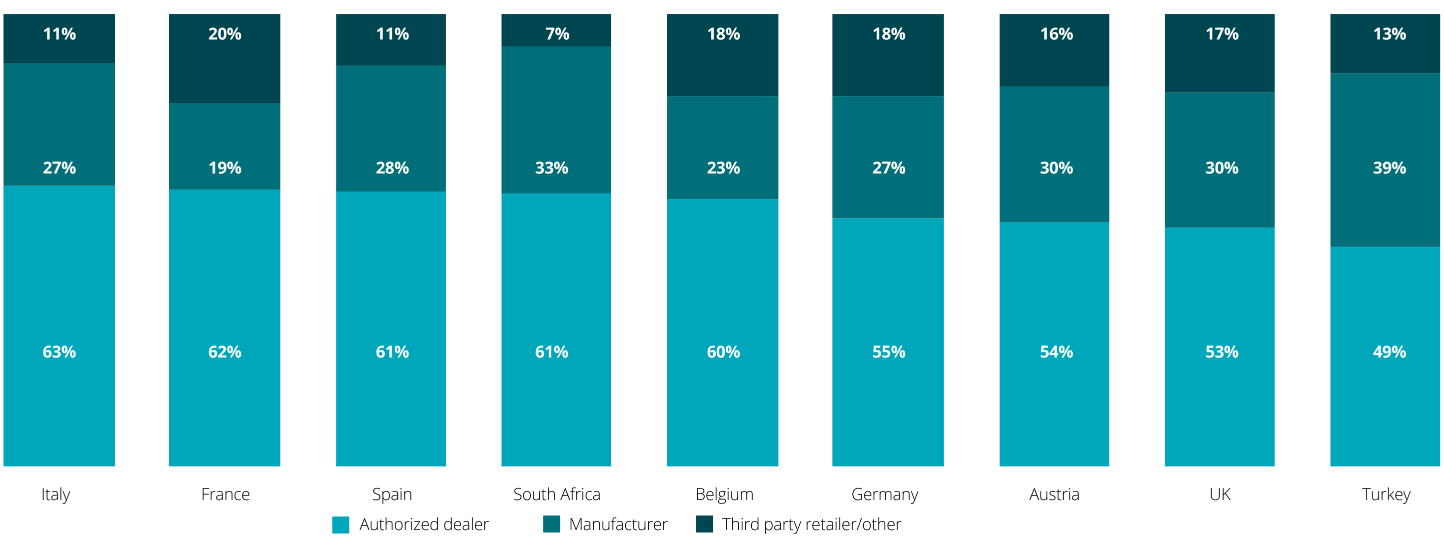


Q48. How would you most prefer to acquire your next vehicle?

Sample size: Austria= 850 ; Belgium= 825; France= 867; Germany= 779; Italy= 808; Spain= 916; Turkey= 954; United Kingdom= 879; South Africa= 895

Even if there is a pervasive shift to online, the role of the dealer should not be underestimated. Those consumers that want a virtual buying process for their next vehicle would still prefer to interact with an authorized dealer.

Most preferred way to acquire next vehicle via a virtual process



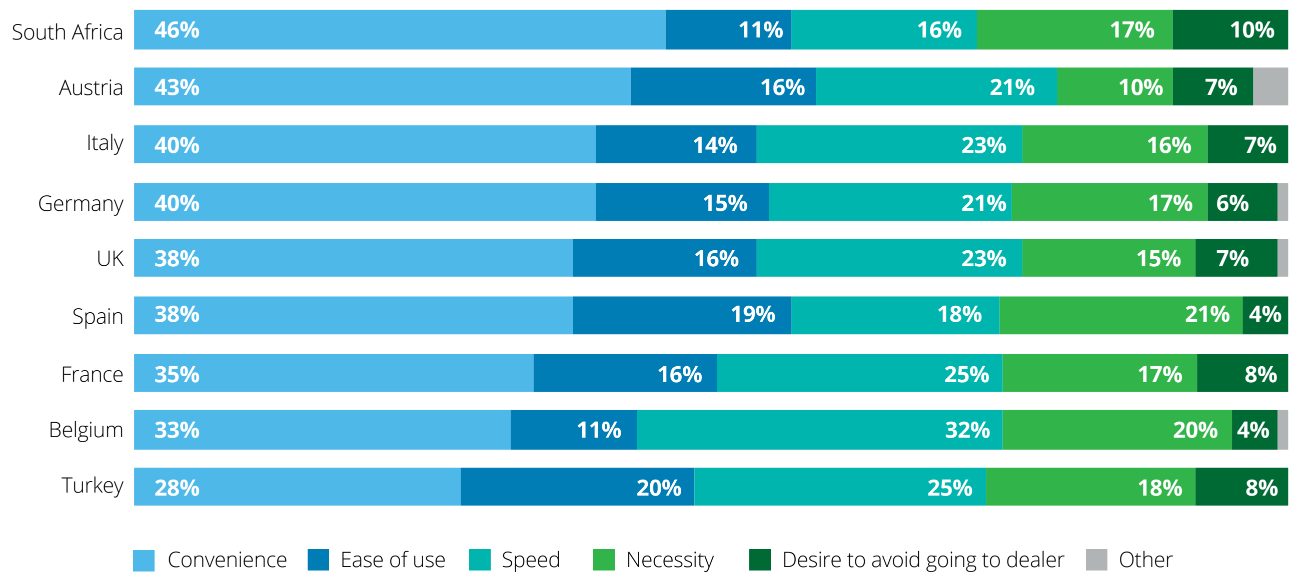
Note: Sum of %s for Italy, France, South Africa, Belgium and Turkey do not add to 100% due to rounding.

Q49. From whom would you most prefer to acquire your next vehicle via a virtual process?

Sample size: Austria= 111; Belgium= 137; France= 133; Germany= 188; Italy= 176; Spain= 168; Turkey= 258; United Kingdom= 296; South Africa= 246

Those consumers that do want a virtual buying process for their next vehicle are attracted by the convenience and speed offered by an online purchase.

Main reason to acquire next vehicle via a virtual process



Note: Sum of %s for France, Belgium and Turkey do not add to 100% due to rounding.
Q50. What is the main reason you would prefer to acquire your next vehicle via a virtual process?
Sample size: Austria= 111; Belgium= 137; France= 133; Germany= 188; Italy= 176; Spain= 168; Turkey= 258; United Kingdom= 296; South Africa= 246

Some things are simply hard to digitize as people still want to see and test drive a vehicle before they buy it.

Main reasons for being not interested in acquiring next vehicle via virtual process

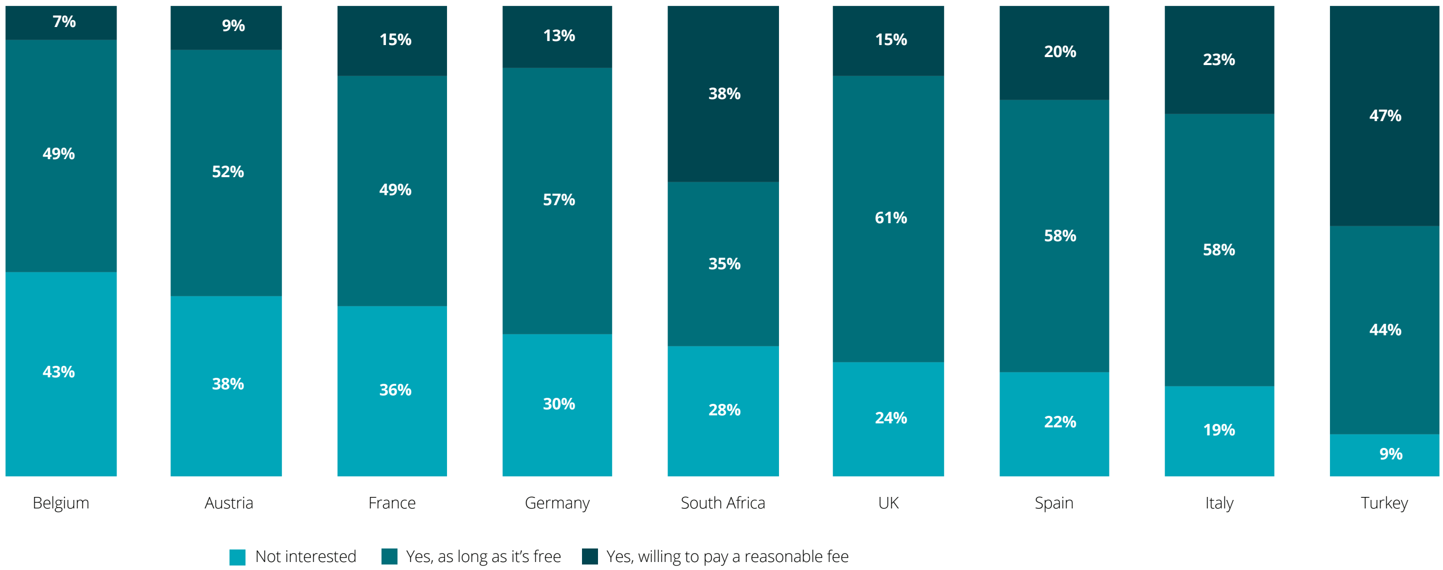
Reason	Austria	Belgium	France	Germany	Italy	Spain	Turkey	UK	South Africa
I have to see the vehicle before buying it	82%	83%	77%	76%	76%	81%	78%	77%	80%
I have to test drive the vehicle	65%	45%	56%	58%	41%	43%	60%	59%	71%
I prefer to negotiate in-person	50%	44%	44%	39%	37%	36%	43%	40%	46%
I don't feel comfortable buying online	17%	34%	30%	18%	34%	40%	34%	37%	56%
I want to interact with a real person	45%	39%	33%	35%	33%	41%	40%	38%	55%
I want a personal contact	46%	32%	29%	33%	24%	30%	28%	27%	50%
I want to be treated like I'm important	16%	11%	5%	11%	6%	9%	10%	16%	25%
I want to build a relationship for service	35%	25%	20%	23%	25%	25%	33%	19%	35%

Q51. What are the main reasons you are not interested in acquiring your next vehicle via virtual process? (Select all that apply)
Sample size: Austria= 739; Belgium= 688; France= 734; Germany= 591; Italy= 632; Spain= 748; Turkey= 750; United Kingdom= 861; South Africa= 649

Most important

Most consumers are interested in non-contact servicing, but only if it's free. This may be a difficult and costly option to maintain post-COVID.

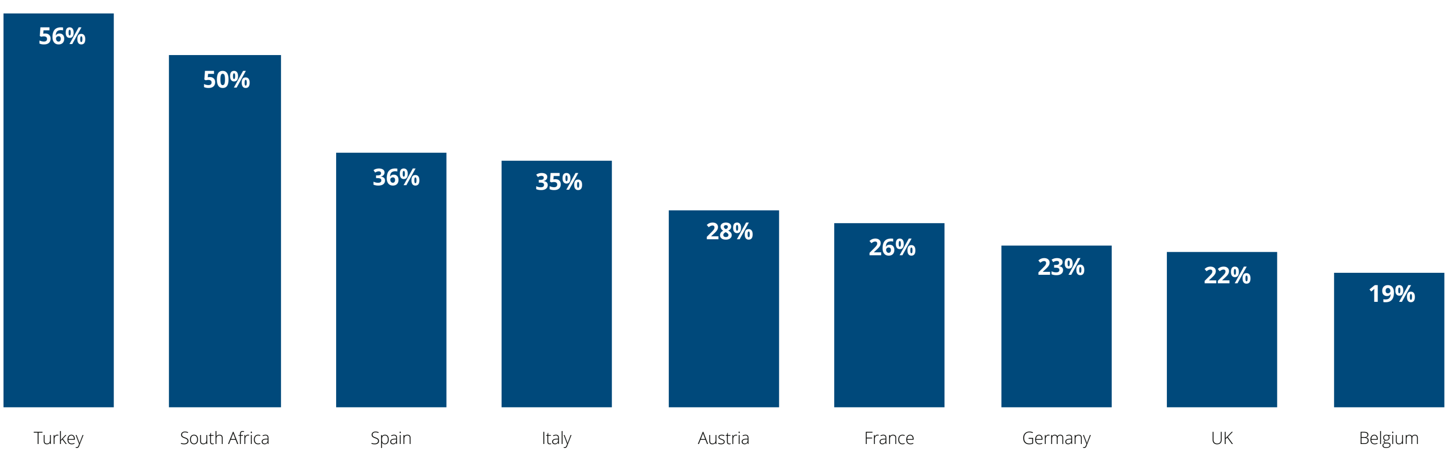
Percentage of consumers who are interested in having their vehicle picked up from home/office when it needs service



Note: Sum of %s for Belgium, Austria and South Africa do not add to 100% due to rounding.
Q20: To what extent are you interested in the following services?
Sample size: Austria= 423; Belgium= 458; France= 373; Germany= 413; Italy= 353; Spain= 553; Turkey= 635; United Kingdom= 598; South Africa= 433

There is burgeoning interest in subscription services that offer access to different models from the same brand.

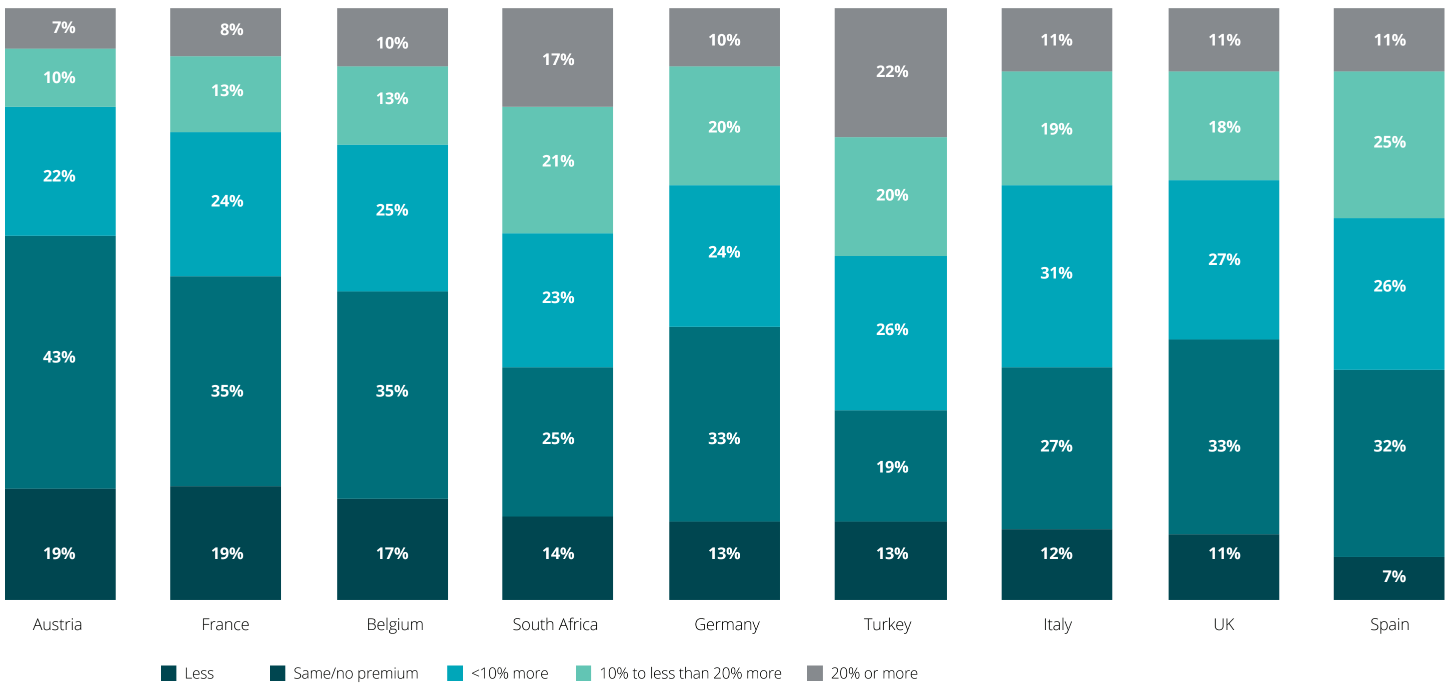
Percentage of consumers who are somewhat/very interested in a subscription that allows access to different models from the same brand



Q59. How interested are you in each of the following scenarios?
Sample size: Germany=1,050; United States=1,053; China=1,049; India=1,002; Japan=1,009; Republic of Korea=1,050

However, consumers are not generally willing to pay a premium for subscription services. In fact, very few EMEA consumers are ready to pay more than 10% for a subscription service.

How much consumers are willing to pay for a subscription service to access different models from the same brand



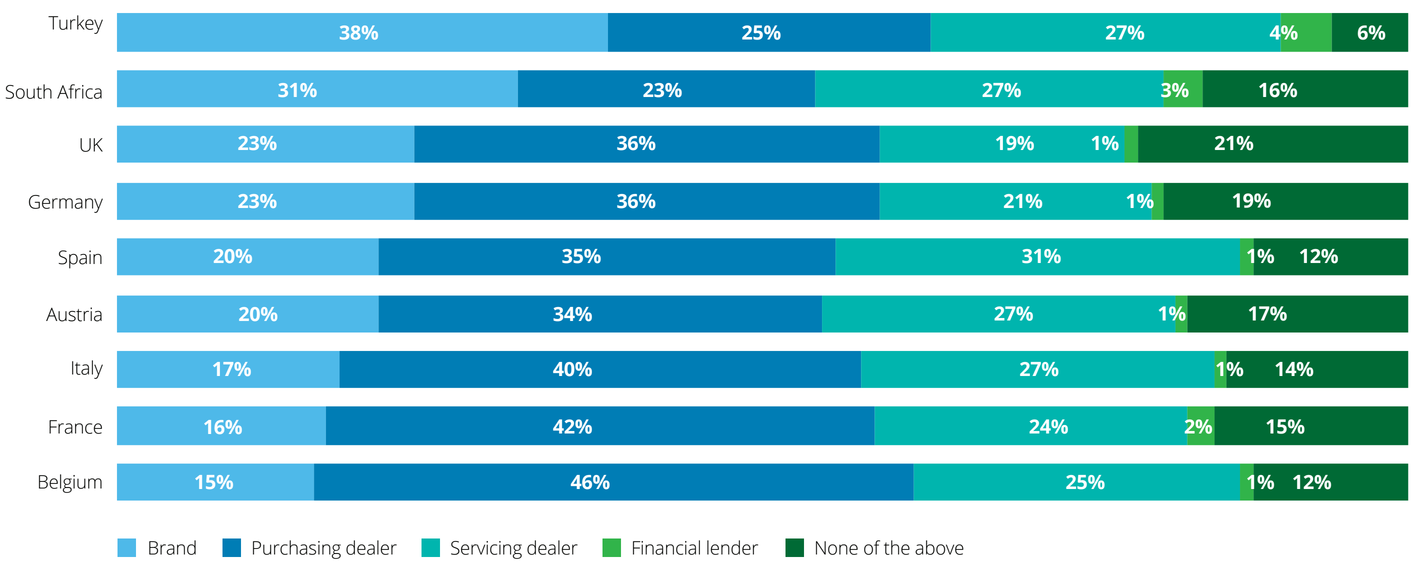
Note: Sum of %s for Austria, France and Spain do not add to 100% due to rounding

Q60. How much would you be willing to pay for each of the following services? (A subscription service where you have the convenience and flexibility to periodically opt for a different vehicle model from the same brand?,)

Sample size: Austria= 614; Belgium= 508; France= 525; Germany= 563; Italy= 682; Spain= 718; Turkey= 793; United Kingdom= 740; South Africa= 786

Consumers in most countries seem to have the most trusted relationship with the purchasing dealer except in Turkey and South Africa where consumers feel most connected to the brand of vehicle they currently own.

Percentage of consumers for whom the most trusted relationship is with...



Note: Sum of %s for Spain, Austria, Italy, France and Belgium do not add to 100% due to rounding.

Q21: With whom do you have the most trusted relationship?

Sample size: Austria= 801; Belgium= 676; France= 568; Germany= 779; Italy= 651; Spain= 882; Turkey= 823; United Kingdom= 1,137; South Africa= 807

About the study

The 2021 study includes more than 24,000 consumer responses from 23 countries around the world. In this report we are discussing the countries in Europe (EMEA) highlighted below.

North America	Sample
Canada (CA)	1,047
Mexico (MX)	1,049
United States (US)	1,053

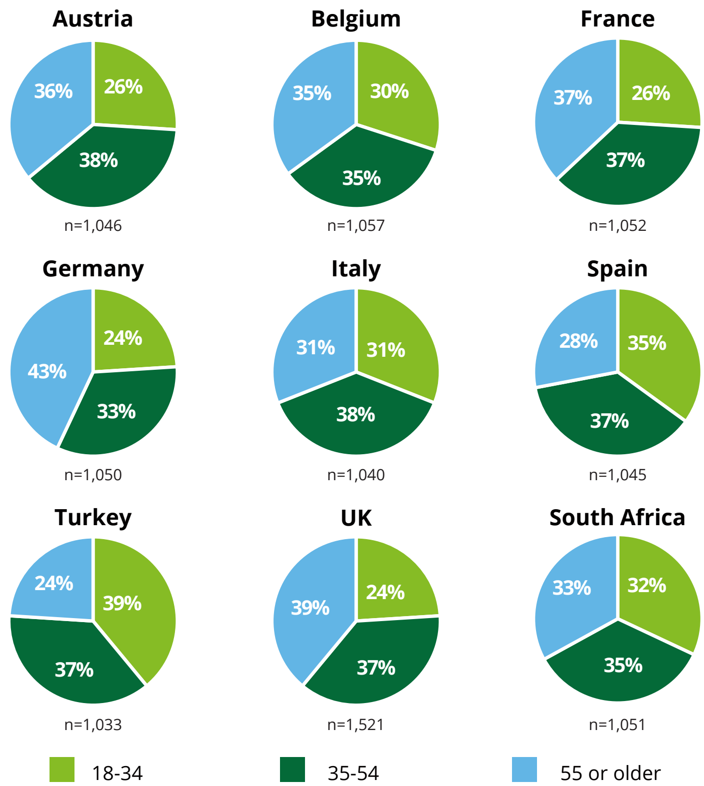
EMEA	Sample
Austria (AT)	1,046
Belgium (BE)	1,057
France (FR)	1,052
Germany (DE)	1,050
Italy (IT)	1,040
Spain (ES)	1,045
South Africa (ZA)	1,051
Turkey (TR)	1,033
United Kingdom (GB)	1,521

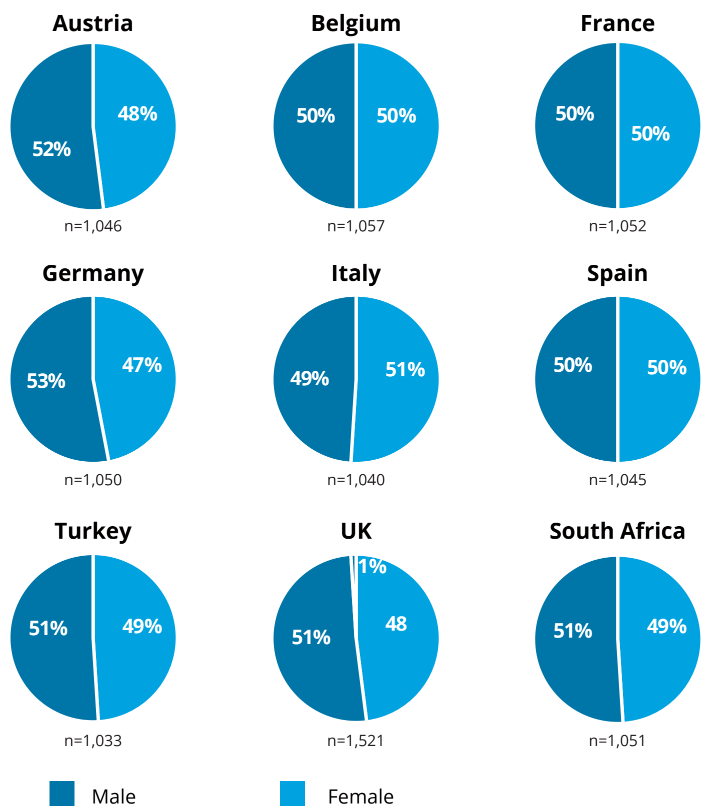
Asia-Pacific	Sample
Australia (AU)	1,024
China (CN)	1,049
India (IN)	1,002
Indonesia (ID)	1,017
Japan (JP)	1,009
Malaysia (MY)	1,013
Philippines (PH)	1,003
Republic of Korea (KR)	1,050
Singapore (SG)	1,013
Thailand (TH)	1,041
Vietnam (VN)	1,021

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.

*Data for Germany has been weighted by age group.
Note: “Sample” represents the number of survey respondents in each country.

Study demographics





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

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