Preface

Deloitte’s Global Automotive Consumer Study 2017 is based on a survey of 22,078 respondents in 17 countries.

The presentation focuses on the German market perspective and compares German consumer preferences internationally with those of the UK, France, Italy, USA, Brazil, China and India.
The Global Automotive Consumer Study investigates "the change of nature in mobility". Within this theme, the study focuses on the impact new technologies like alternative powertrains, connected vehicle technology, fully self-driving cars and ride-sharing have on consumer transportation choices.
Respondents from all participating countries were mainly clustered into three categories: generation, living area & gender

<table>
<thead>
<tr>
<th>Generations</th>
<th>Living areas</th>
<th>Genders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>Germany</td>
<td>Germany</td>
</tr>
<tr>
<td>Pre/Baby-Boomers</td>
<td>Rural</td>
<td>54%</td>
</tr>
<tr>
<td>Gen Y/Z</td>
<td>Suburban</td>
<td></td>
</tr>
<tr>
<td>Gen X</td>
<td>Urban</td>
<td>46%</td>
</tr>
<tr>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Generation</th>
<th>Year of birth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre/Baby-Boomers</td>
<td>Before 1965</td>
</tr>
<tr>
<td>Gen X</td>
<td>1965 - 1976</td>
</tr>
<tr>
<td>Gen Y/Z</td>
<td>1977 - 2000</td>
</tr>
</tbody>
</table>

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Contents

Executive Summary 6

Autonomous Driving 9

Connectivity 17

Powertrain 21

Ride-Sharing 29

Appendix 35
Executive Summary
Executive Summary 1/2
Autonomous Driving & Connectivity

ıt is a huge issue.

People see greater benefits of autonomous vehicles on highways than in cities.

As the countries with the greatest acceptance of and demand for self-driving technologies, China and India are interesting markets to introduce autonomous driving.

In general, customers in all participating countries greatly fear someone hacking into their car and putting their personal safety at risk.

Across all generations, Germans do not have confidence in data security, making Germany the most skeptical country.

In all participating countries, around 80% fear someone hacking into their car and risking their personal safety.

In Germany 70% believe that car-generated personal data is not safe and secure from hackers.

Skepticism towards autonomous vehicles in Germany/Western Europe and the US is a huge issue.

Only 28% of all German respondents believe fully self-driving vehicles will be safe.

Among Germans who think self-driving vehicles can be helpful, 81% think they could benefit from those on highways.

Around 60% of Chinese and Indian respondents find fully self-driving vehicles desirable to meet their individual and family needs.
Executive Summary 2/2
Powertrain & Ride-Sharing

Powertrain

Across all generations the interest in alternative powertrains is increasing, even though most people still drive with conventional engine types.

Of all new technologies, customers are willing to pay the most for alternative engine types (particularly younger generations). Internationally, China and India show the highest willingness to pay for new technologies; France the least.

People are very demanding when it comes to the charging times and travel range in all-battery powered electric vehicles. While younger generations are more likely to make compromises overall, Germany is by far the most demanding country when it comes to travel range.

Ride-Sharing

In Western Europe, ride-sharing is far less popular than it is in China, India, Brazil or the US. Take-up rates are highest among younger generations in urban areas.

Current mobility options make car ownership in urban areas less interesting. However, Germans are less willing to give up car ownership.

Almost one in two Indians in urban areas use ride-sharing services at least once a week (47%, but only 9% in Germany).

66% of all Americans urban dwellers are thinking about giving up their cars. In Germany, it is 43%.

97% of German respondents drive with conventional engines types (gasoline or diesel).

43% of all Chinese intend to buy a hybrid vehicle as their next vehicle, currently already 7% drive with hybrid engines.

66% of all Germans want an all-battery powered electric vehicle to be able to drive 400 km or more on full charge.
Autonomous Driving
### General opinion - Germany

Skepticism towards autonomous vehicles in Germany is a huge issue, just around 22% of Pre/Baby-Boomers and Women respondents believe fully self-driving cars will be safe; Younger generations are more open.

<table>
<thead>
<tr>
<th>Trust by generations</th>
<th>Trust by gender</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pre/Baby-Boomers</strong></td>
<td><strong>Women</strong></td>
</tr>
<tr>
<td>23%</td>
<td>21%</td>
</tr>
<tr>
<td>26%</td>
<td></td>
</tr>
<tr>
<td>35%</td>
<td></td>
</tr>
<tr>
<td><strong>Gen X</strong></td>
<td><strong>Men</strong></td>
</tr>
<tr>
<td>34%</td>
<td>36%</td>
</tr>
<tr>
<td>40%</td>
<td></td>
</tr>
<tr>
<td>51%</td>
<td></td>
</tr>
<tr>
<td><strong>Gen Y/Z</strong></td>
<td></td>
</tr>
<tr>
<td>38%</td>
<td>41%</td>
</tr>
<tr>
<td>47%</td>
<td></td>
</tr>
<tr>
<td>60%</td>
<td></td>
</tr>
</tbody>
</table>

- **S:** Fully self-driving cars will be safe.
- **S:** I would trust an autonomous car to drive for me.
- **S:** Travelling in a fully self-driving car will be a positive experience.
- **S:** A fully self-driving car will free up my time, so I can focus on other activities.

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General opinion - International

Lacking trust in autonomous vehicle technology, only 28% of Germans believe fully self-driving cars will be safe, while 70% of respondents in India say they would trust autonomous cars to drive them.
General interest - International

Respondents from Germany in particular and Europe in general are less interested in autonomous cars, whereas around 60% of all participants in China and India find full self-driving cars desirable for private use.

Different types of automation

1) Basic Automation
   Automation that allows the driver to be in complete control with vehicle performing specific automated tasks

2) Advanced Automation
   Automation that combines at least two functions such as adaptive cruise control and lane centering technology

3) Limited Self-Driving
   Automation that allows vehicle to take over all driving functions under certain traffic and environmental conditions

4) Full Self-Driving
   Automation that allows the vehicle to take over all driving functions for an entire trip
General interest – Germany & International

Leaving aside price and safety issues, Gen Y/Z is most likely to use self-driving vehicles; internationally, China leads the way with 82% of all respondents indicating they would use autonomous cars.

Germany

S: If price and/or safety were not an issue, I am willing to use a vehicle that could drive itself.

German by generation

<table>
<thead>
<tr>
<th>Generation</th>
<th>Germany</th>
<th>International</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre/Baby-Boomers</td>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>Gen X</td>
<td>41%</td>
<td></td>
</tr>
<tr>
<td>Gen Y/Z</td>
<td>55%</td>
<td></td>
</tr>
</tbody>
</table>

* "Rather yes" and "Perhaps" together with "Rather no" add up to 100%.
Trust in company types – Germany & International

All generations in Germany trust traditional car manufacturers the most to bring fully autonomous vehicle technology to market; in China, 58% trust in new companies that specialize in autonomous vehicles.

**Q: Which type of company would you trust the most to bring fully-autonomous (self-driving) vehicle technology to the market?**

<table>
<thead>
<tr>
<th>Germany</th>
<th>International</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre/Baby-Boomers (50%)</td>
<td>GER</td>
</tr>
<tr>
<td>Gen X (53%)</td>
<td>UK</td>
</tr>
<tr>
<td>Gen Y/Z (50%)</td>
<td>FRA</td>
</tr>
</tbody>
</table>

- Traditional car manufacturer: Green
- A new company that specializes in autonomous vehicles: Dark Green
- Existing technology company: Light Blue
- Other: Black

- **GER (Germany)**: 27%, 51%
- **UK (United Kingdom)**: 23%, 47%
- **FRA (France)**: 29%, 56%
- **ITA (Italy)**: 27%, 47%
- **USA (United States)**: 22%, 55%
- **BRA (Brazil)**: 15%, 27%
- **CHN (China)**: 58%, 34%
- **IND (India)**: 1%, 36%
Field of usage - Germany

Among Germans who agree self-driving vehicles can be helpful, 81% think they could benefit from this technology on highways, while 55% see its benefits in cities.

Highways vs. cities

Q: Where do you think fully autonomous vehicles would have the most immediate benefit to you?

- **Highways**: 81% think autonomous vehicles can be useful on highways.
- **Cities**: 36% think autonomous vehicles would have the most immediate benefit on both highways and cities.
- **Both**: 19% think autonomous vehicles can be helpful anywhere.
- **Can not be helpful anywhere**: 32%

81% think autonomous vehicles can be useful on highways.
Summary & Implications
Autonomous Driving

**Summary**

- **Skepticism** towards autonomous vehicles in Germany/Western Europe and the US is quite **high**
- **China, India** and also **Brazil** are less **skeptical** and more interested in self-driving vehicles
- Approximately **60% of Chinese and Indian** people find **full self-driving vehicles desirable** for private use
- **Younger generations in Germany** tend to be **more open** to using self-driving vehicles than older generations
- Western European countries **trust traditional car manufacturers** the most to bring **fully autonomous vehicle technology** to market
- The majority of respondents see the **benefits of self-driving vehicles on highways**

**Implications**

- **China and India** are the most open and demanding countries for self-driving technologies and therefore interesting markets to **introduce autonomous vehicles**
- Chinese customers would more likely trust companies that are specialized in autonomous vehicles to bring self-driving vehicles to the market, so **cooperation with technology partners** might be an option (another reason for that phenomenon might be the lack of strong Chinese OEMs)
- **Autonomous vehicle technology could start off on highways**, where people see the strongest benefit
Connectivity
Fear of hack attacks - Germany

German consumers don’t believe car-generated data is safe and secure, nor that their personal safety is assured; across all generations, 78% fear hackers will access their data & put their personal safety at risk.

**Data security**

*S: I believe personal data generated from my car is not safe and secure from hackers.*

- **Total:** 70%
  - **Pre/Baby-Boomers:** 77%
  - **Gen X:** 67%
  - **Gen Y/Z:** 62%

**Personal safety**

*S: With my car connected to the outside world, I fear someone hacking into my car and risking my personal safety.*

- **Total:** 78%
  - **Pre/Baby-Boomers:** 80%
  - **Gen X:** 75%
  - **Gen Y/Z:** 78%
Fear of hack attacks - International

German mistrust towards data security is significantly higher than that of other countries; 70% of all Germans do not believe car-generated personal data is safe and secure compared with only 24% Indians.

Data security & personal safety

S: *I believe personal data generated from my car is not safe and secure from hackers.*

S: *With my car connected to the outside world, I fear someone hacking into my car and risking my personal safety.*
Summary

- **Germans do not trust data security.** With 70% of respondents believing their personal data is not safe and secure, Germany is the most skeptical country.
- In **India** and **China**, people show the highest trust in terms of data safety & security.
- However, the fear of someone hacking into the car system and putting their personal safety at risk is high among respondents from all countries (~80%).

Implications

- **Piloting new technologies in** markets that are most open to innovations (e.g. the Chinese or Indian market) is recommended.
- **Successful** lighthouse pilot projects could help establish and build trust over time in very skeptical countries like Germany.
Powertrain
Current vs. future engine types - Germany

Across all generations and living areas people are more interested in choosing alternative engine types for their next vehicle, while 97% of all German respondents still currently drive with gasoline or diesel.

**Current situation**

Q: What type of engine is in your vehicle you drive most often?

- 97% Conventional
- 2% Hybrid
- 1% Other alternative

**Buying intention for next vehicle**

Q: What type of engine would you prefer in your next vehicle?

- 72% Conventional
- 19% Hybrid
- 9% Other alternative
- 75% Gasoline
- 70% Diesel
- 30% Compressed natural gas
- 29% All battery-powered electric
- 29% Hydrogen fuel cell
- 71% Urban
- 25% Suburban
- 29% Rural

Generations:
- Pre/Baby-Boomers: 29% Conventional, 71% Alternative
- Gen X: 25% Conventional, 75% Alternative
- Gen Y/Z: 29% Conventional, 71% Alternative

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Current vs. future engine types - International

Interest in vehicles with alternative powertrains continues to increase, 43% of all Chinese respondents would prefer a hybrid engine in their next vehicle.

Engine types

Q: What type of engine is in your vehicle you drive most often?

Q: What type of engine would you prefer in your next vehicle?

Other alternative powertrains:
- Ethanol
- Compressed natural gas
- All battery-powered electric
- Hydrogen fuel cell
Willingness to pay - Germany

Among all technologies, customers are willing to pay the most for alternative powertrains; Gen Y/Z in particular is willing to pay a premium for vehicles equipped with new technologies.

New technologies

Q: How much more would you be willing to pay for a vehicle that had the technologies listed below and that met your wants and needs?

- Alternative powertrain
- Autonomous technologies
- Safety
- Connectivity
- Cockpit

Generations

Q: How much more would you be willing to pay for a vehicle that had the technologies listed below and that met your wants and needs?

Pre/Baby-Boomers
- Gen X
- Gen Y/Z

Alternative powertrain
- > 300€ and max. 1500€
- > 1500€

Autonomous technologies
- > 0€ and max. 300€
- > 300€ and max. 1500€
- > 1500€

1) e.g., electric, hybrid, fuel cell, and ethanol based engines
2) e.g., full-self driving cars, adaptive cruise control, etc.
3) e.g., lane departure warning, blind spot detection, etc.
4) e.g., communication with other vehicles & infrastructure to optimize traffic flow, schedule vehicle appointments, etc.
5) e.g., entertainment, smartphone mirroring, voice recognition
Willingness to pay - International

In an international comparison, American, Indian and Chinese respondents show the highest willingness to pay for new technologies, while willingness among French respondents is the lowest.

Alternative powertrains

Q: How much more would you be willing to pay for a vehicle that had the technologies listed below and that met your wants and needs?

Autonomous technologies

Q: How much more would you be willing to pay for a vehicle that had the technologies listed below and that met your wants and needs?

### Alternative powertrains

- **USA**: 17%
- **BRA**: 13%
- **CHN**: 19%
- **IND**: 28%

### Autonomous technologies

- **USA**: 23%
- **BRA**: 10%
- **CHN**: 19%
- **IND**: 22%

<table>
<thead>
<tr>
<th>Country</th>
<th>&gt; 1500€</th>
<th>&gt; 300€ and max. 1500€</th>
</tr>
</thead>
<tbody>
<tr>
<td>GER</td>
<td>20%</td>
<td>15%</td>
</tr>
<tr>
<td>UK</td>
<td>19%</td>
<td>17%</td>
</tr>
<tr>
<td>FRA</td>
<td>16%</td>
<td>27%</td>
</tr>
<tr>
<td>ITA</td>
<td>17%</td>
<td>27%</td>
</tr>
<tr>
<td>USA</td>
<td>26%</td>
<td>27%</td>
</tr>
<tr>
<td>BRA</td>
<td>13%</td>
<td>32%</td>
</tr>
<tr>
<td>CHN</td>
<td>19%</td>
<td>32%</td>
</tr>
<tr>
<td>IND</td>
<td>28%</td>
<td>32%</td>
</tr>
</tbody>
</table>

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Desired features in electric cars - Germany

Germans are very demanding in terms of electric car performance, two-thirds of all respondents want EVs capable of driving 400 km; Gen Y/Z is most likely to make compromises.

### Charging time

**Q:** *In your opinion, what is the maximum time you would be willing to wait to fully charge an all-battery powered electric vehicle?*

<table>
<thead>
<tr>
<th></th>
<th>Pre/Baby-Boomers</th>
<th>Gen X</th>
<th>Gen Y</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 1 hour</td>
<td>6%</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>2 hours</td>
<td>12%</td>
<td>15%</td>
<td>22%</td>
</tr>
<tr>
<td>4 hours</td>
<td>20%</td>
<td>24%</td>
<td>26%</td>
</tr>
<tr>
<td>8 hours or more</td>
<td>62%</td>
<td>56%</td>
<td>45%</td>
</tr>
</tbody>
</table>

### Travel range

**Q:** *In your opinion, what is the minimum distance an all-battery powered electric vehicle needs to be able to drive on a full charge?*

<table>
<thead>
<tr>
<th></th>
<th>Pre/Baby-Boomers</th>
<th>Gen X</th>
<th>Gen Y</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural 80 – 160 km</td>
<td>6%</td>
<td>9%</td>
<td>12%</td>
</tr>
<tr>
<td>Rural 240 – 320 km</td>
<td>25%</td>
<td>21%</td>
<td>25%</td>
</tr>
<tr>
<td>Rural 400 km or more</td>
<td>69%</td>
<td>70%</td>
<td>64%</td>
</tr>
<tr>
<td>Suburban 80 – 160 km</td>
<td>6%</td>
<td>9%</td>
<td>11%</td>
</tr>
<tr>
<td>Suburban 240 – 320 km</td>
<td>25%</td>
<td>21%</td>
<td>25%</td>
</tr>
<tr>
<td>Suburban 400 km or more</td>
<td>64%</td>
<td>70%</td>
<td>64%</td>
</tr>
<tr>
<td>Urban 80 – 160 km</td>
<td>6%</td>
<td>9%</td>
<td>12%</td>
</tr>
<tr>
<td>Urban 240 – 320 km</td>
<td>25%</td>
<td>21%</td>
<td>25%</td>
</tr>
<tr>
<td>Urban 400 km or more</td>
<td>64%</td>
<td>70%</td>
<td>64%</td>
</tr>
</tbody>
</table>
Most people in the countries surveyed expect all-battery powered electric vehicles to be fully charged after one hour; Germany has the greatest demand for travel range.

**Charging time**

*Q: In your opinion, what is the maximum time you would be willing to wait to fully charge an all-battery powered electric vehicle?*

<table>
<thead>
<tr>
<th>Country</th>
<th>Max. one hour</th>
<th>2 hours</th>
<th>More than 2 hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>GER</td>
<td>23%</td>
<td>54%</td>
<td>23%</td>
</tr>
<tr>
<td>UK</td>
<td>26%</td>
<td>53%</td>
<td>21%</td>
</tr>
<tr>
<td>FRA</td>
<td>19%</td>
<td>64%</td>
<td>19%</td>
</tr>
<tr>
<td>ITA</td>
<td>22%</td>
<td>63%</td>
<td>15%</td>
</tr>
<tr>
<td>USA</td>
<td>23%</td>
<td>56%</td>
<td>23%</td>
</tr>
<tr>
<td>BRA</td>
<td>18%</td>
<td>60%</td>
<td>22%</td>
</tr>
<tr>
<td>CHN</td>
<td>32%</td>
<td>48%</td>
<td>20%</td>
</tr>
<tr>
<td>IND</td>
<td>40%</td>
<td>33%</td>
<td>27%</td>
</tr>
</tbody>
</table>

**Travel range**

*Q: In your opinion, what is the minimum distance an all-battery powered electric vehicle needs to be able to drive on a full charge?*

<table>
<thead>
<tr>
<th>Country</th>
<th>At least 400 km</th>
<th>400 km or more</th>
</tr>
</thead>
<tbody>
<tr>
<td>GER</td>
<td>66%</td>
<td>34%</td>
</tr>
<tr>
<td>UK</td>
<td>42%</td>
<td>58%</td>
</tr>
<tr>
<td>FRA</td>
<td>29%</td>
<td>71%</td>
</tr>
<tr>
<td>ITA</td>
<td>37%</td>
<td>63%</td>
</tr>
<tr>
<td>USA</td>
<td>51%</td>
<td>49%</td>
</tr>
<tr>
<td>BRA</td>
<td>38%</td>
<td>62%</td>
</tr>
<tr>
<td>CHN</td>
<td>36%</td>
<td>64%</td>
</tr>
<tr>
<td>IND</td>
<td>20%</td>
<td>80%</td>
</tr>
</tbody>
</table>

*At least 400 km vs. 400 km or more*
Summary & Implications

Powertrain

**Summary**

- The **interest in alternative powertrains** is increasing, but **97% of all German respondents** still drive with **gasoline/diesel**
- **China** shows the **highest interest** in alternative powertrains, already **43%** intend to **buy a hybrid car** as their next vehicle
- Customers are **willing to pay the most** for **alternative powertrains** compared to other new vehicle technologies
- **American, Chinese** and **Indian** respondents show the **highest willingness to pay** for new vehicle technologies
- People are still **very demanding** when it comes to the **charging time and travel range of electric cars**, **Gen Y/Z** is most likely to make compromises
- **Germany** is by far the **most demanding country** when it comes to the travel range of all battery-powered electric vehicles

**Implications**

- **OEMs** should **increase** their efforts regarding **new alternative engine technologies** to meet and address customers interests (especially younger generations)
- **Additional costs** can (at least partially) be **passed on** the **customers** due to their increased willingness to pay
- We probably should not read too much into responses indicating **willingness to pay**, as consumers’ actual **ability to pay** differs **vastly** among the countries surveyed
- **The Chinese market** is a suitable target to **penetrate with hybrid vehicles**
- The high interest in alternative powertrains in **China** may likely be attributed to **issues consumers face in obtaining car licenses**
Ride-sharing
Use of ride-sharing - Germany

Ride-sharing services are mostly used by younger generations in urban areas; 15% of urban Gen Y/Z in Germany use ride-sharing at least once a week.

**Germany by living area**

Q: How often do you currently use ride-sharing services?

<table>
<thead>
<tr>
<th>Living Area</th>
<th>At least once a week</th>
<th>Rarely (i.e., only as needed)</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural</td>
<td>3%</td>
<td>15%</td>
<td>18%</td>
</tr>
<tr>
<td>Suburban</td>
<td>9%</td>
<td>16%</td>
<td>25%</td>
</tr>
<tr>
<td>Urban</td>
<td>9%</td>
<td>24%</td>
<td>33%</td>
</tr>
</tbody>
</table>

**Germany by generation in urban areas**

Q: How often do you currently use ride-sharing services?

Urban Pre/Baby-Boomers

- At least once a week: 83%
- Rarely (i.e., only as needed): 16%
- Never: 1%

Urban Gen X

- At least once a week: 70%
- Rarely (i.e., only as needed): 20%
- Never: 10%

Urban Gen Y/Z

- At least once a week: 53%
- Rarely (i.e., only as needed): 32%
- Never: 15%
Use of ride-sharing - International

Ride-sharing in Western European countries is far less popular than it is China, India, Brazil or the US; in India, almost one in two people uses ride-sharing services at least once a week.

Ride-sharing usage

Q: How often do you currently use ride-sharing services?

Q: What percent of your use of ride-sharing services is for business versus personal trips?

At least once a week  Rarely (only as needed)  Never
Giving up car ownership - Germany

In light of current mobility options, owning a car is becoming less interesting for urban dwellers; only 38% of the Gen Y/Z in Germany’s urban areas prefer not to give up their car.

**Germany by living area**

* S: With the current mobility options available to me, I am willing to give up owning a car.

<table>
<thead>
<tr>
<th>Living Area</th>
<th>Rather yes</th>
<th>Perhaps</th>
<th>Rather no</th>
<th>“Rather yes” + “Perhaps”</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural</td>
<td>26%</td>
<td>15%</td>
<td>11%</td>
<td>42%</td>
</tr>
<tr>
<td>Suburban</td>
<td>34%</td>
<td>17%</td>
<td>17%</td>
<td>68%</td>
</tr>
<tr>
<td>Urban</td>
<td>43%</td>
<td>19%</td>
<td>24%</td>
<td>86%</td>
</tr>
</tbody>
</table>

**Germany by generation in urban areas**

* S: With the current mobility options available to me, I am willing to give up owning a car.

<table>
<thead>
<tr>
<th>Generation</th>
<th>Rather yes</th>
<th>Perhaps</th>
<th>Rather no</th>
<th>“Rather yes” + “Perhaps”</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre/Baby-Boomers</td>
<td>72%</td>
<td>11%</td>
<td>17%</td>
<td>100%</td>
</tr>
<tr>
<td>Gen X</td>
<td>62%</td>
<td>18%</td>
<td>20%</td>
<td>100%</td>
</tr>
<tr>
<td>Gen Y/Z</td>
<td>38%</td>
<td>28%</td>
<td>34%</td>
<td>100%</td>
</tr>
</tbody>
</table>
Giving up car ownership - International

Car ownership is becoming less interesting in urban areas worldwide. Two out of three Americans from urban areas consider giving up owning a car; in Germany, that figure is 43%.

Reason: Current mobility options

S: With the current mobility options available to me, I am willing to give up owning a car.

Reason: Ride-sharing services

Q: Does your use of ride-sharing services make you question whether you need to own a vehicle in the future?

1: Ratios are exemplary
2: Other possible answer was “Rather no”
3: Other possible answers were “NO” or “Have not thought about it”
Summary

• Ride-sharing is mostly used by Gen Y/Z in urban areas.

• Ride-sharing is most popular in the US, Brazil, China and India; almost one in two people uses ride-sharing services in India at least once per week.

• In Germany, people use ride-sharing services mainly for personal travel (79%, only 21% are business travel).

• By contrast, in the US, Brazil, Italy & India almost half of all ride-sharing travels are business-related.

• Considering current mobility options, car ownership is becoming less interesting in urban areas.

• Two out of three Americans living in urban areas would consider giving up owning a car.

• By contrast, Germans are still less likely to give up car ownership (43%).

Implications

• Current mobility options make living without a car easier; especially younger generations in urban areas are losing interest in owning a car.

• A shift from car ownership towards usership is occurring in urban areas across the globe.

• OEM car sales in the B2C segment will likely shrink, while there is greater potential to win customers for B2B business, e.g. transport companies will lease/purchase entire fleets of autonomous vehicles when self-driving technologies enter the market (those vehicles will also be used for shared rides, e.g. autonomous buses).

• OEMs develop more into a mobility providers, moving away from the typical image of a traditional car manufacturer.
Appendix
Trust chart - International

Germany’s Premium OEMs have very good reputations internationally and emerge as the trusted brands to offer self-driving cars in the future.

Q: Which brand would you trust the most to offer a fully-autonomous car in the future?
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