



2022 Global Automotive Consumer Study

Key Findings: India

January 2022

About the study

The 2022 study includes more than 26,000 consumer responses from 25 countries around the world.

North America	Sample
Canada (CA)	1,005
Mexico (MX)	1,003
United States (US)	1,031

EMEA	Sample
Austria (AT)	1,042
Belgium (BE)	1,046
Czech Republic (CZ)	1,006
France (FR)	1,005
Germany (DE)	1,507
Italy (IT)	1,003
Poland (PL)	1,007
Romania (RO)	846
South Africa (ZA)	1,011
Spain (ES)	1,013
United Kingdom (GB)	1,506

Asia-Pacific	Sample
Australia (AU)	1,027
China (CN)	1,022
India (IN)	1,006
Indonesia (ID)	1,001
Japan (JP)	1,000
Malaysia (MY)	1,005
Philippines (PH)	1,007
Republic of Korea (KR)	1,012
Singapore (SG)	1,015
Thailand (TH)	1,004
Vietnam (VN)	1,017

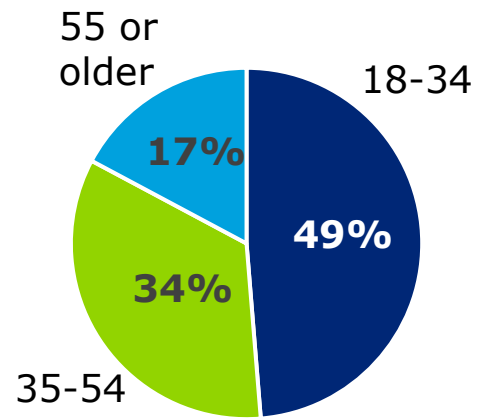
Study methodology

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.

Sample distribution - India

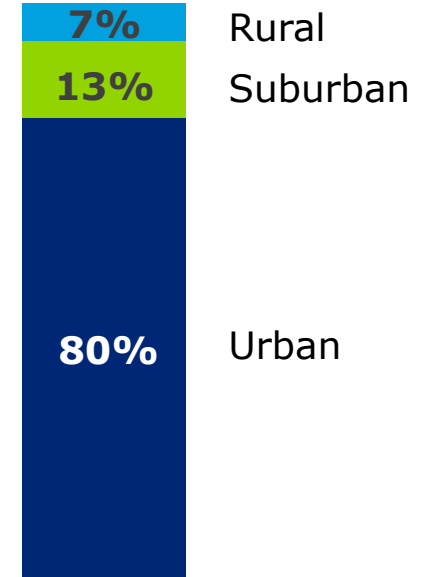
Age groups



Gender



Living area



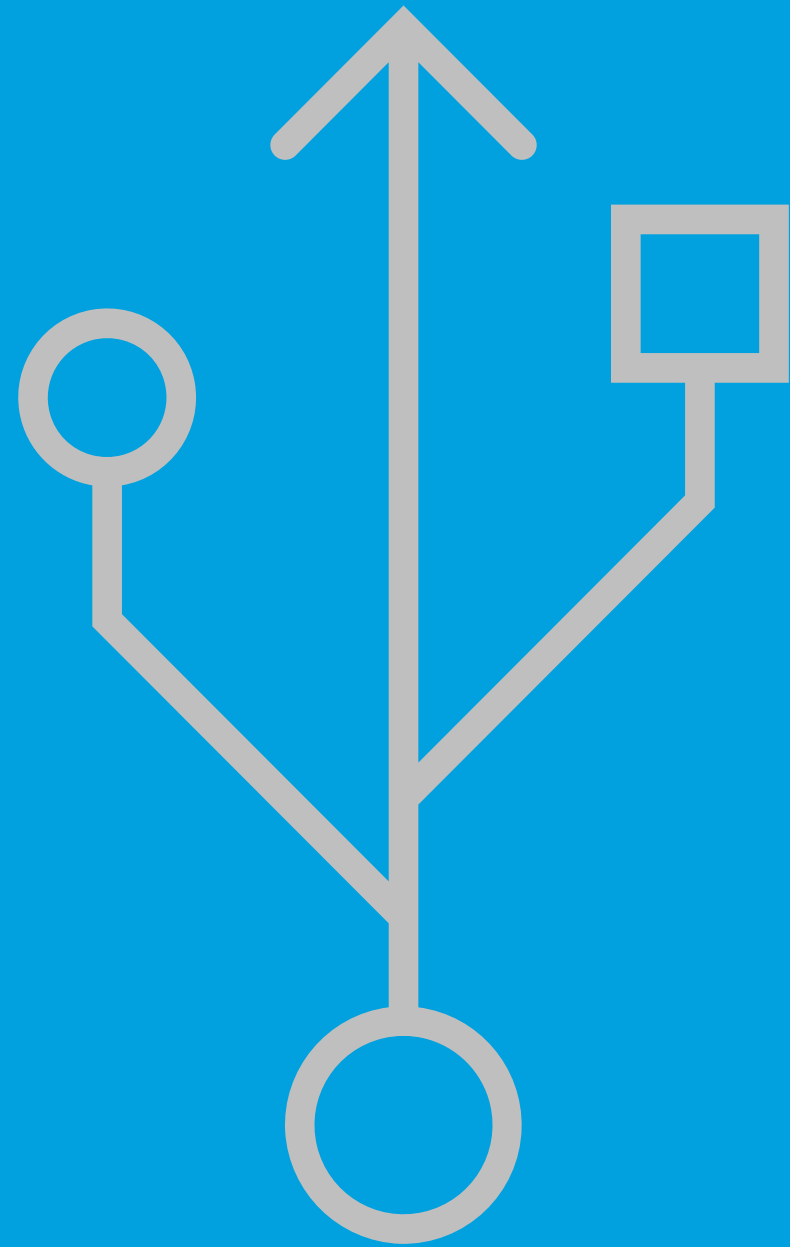
Sum of %s in few slides may not add to 100% due to rounding

Sample size: n= 1,006

Agenda

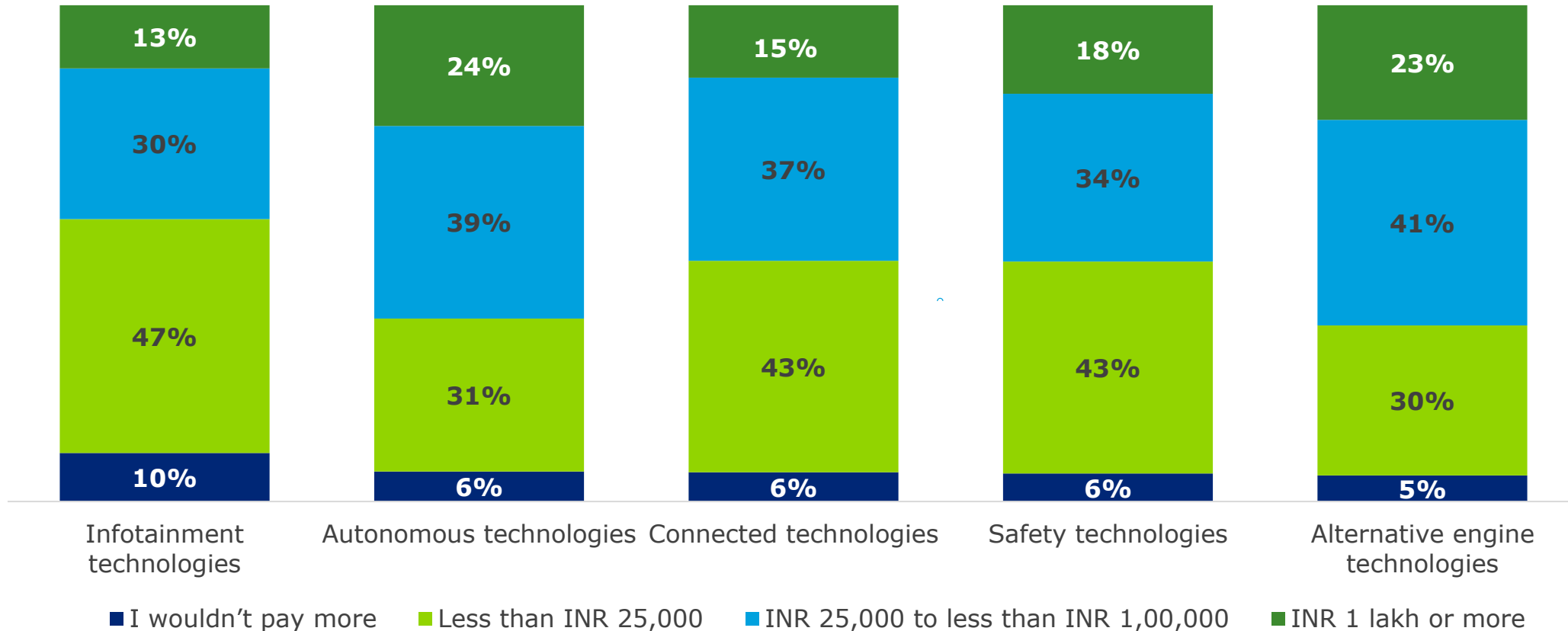
Topic	Slide No.
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**Advanced
technologies**



Consumers are willing to pay more for automotive technologies, but only up to 1,00,000 rupees – is it enough to generate a compelling ROI for OEMs?

Willingness to pay for technologies



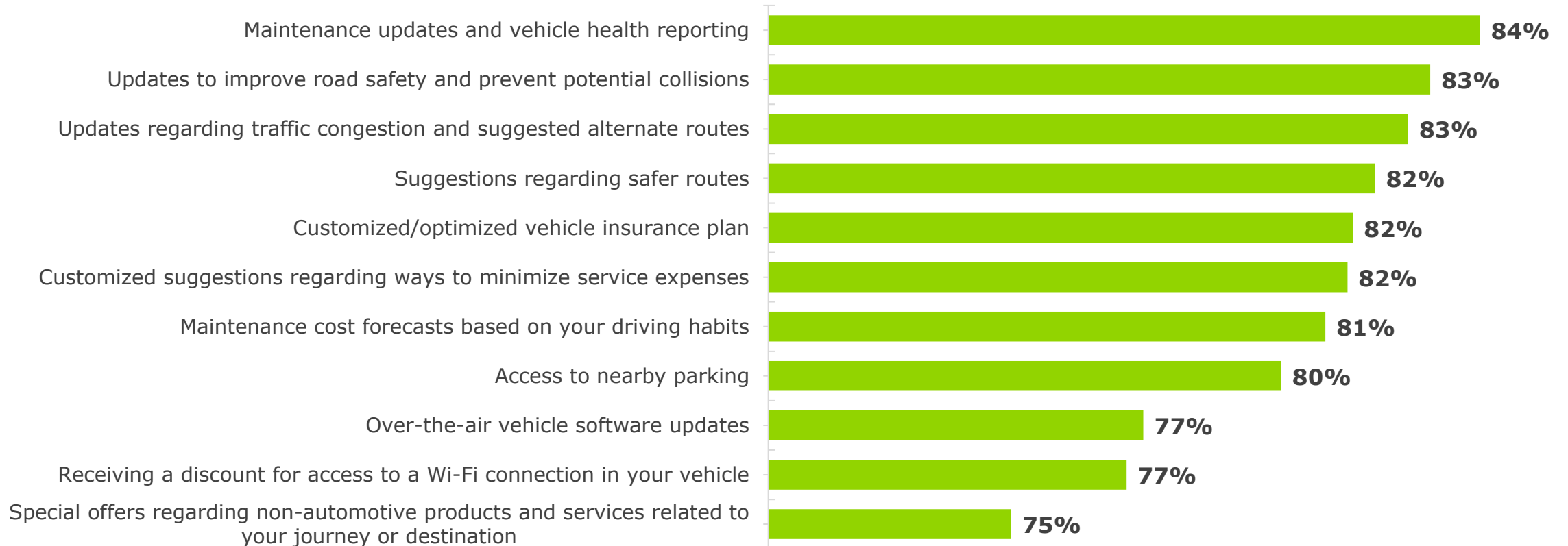
Q3. How much more would you be willing to pay for a vehicle that had each of the technologies listed below?

Sample size: n= 989

India

Consumers, by and large, are ready to share personal data generated from a connected vehicle.

Interest (somewhat/very interested) in a connected vehicle if it provides benefits related to

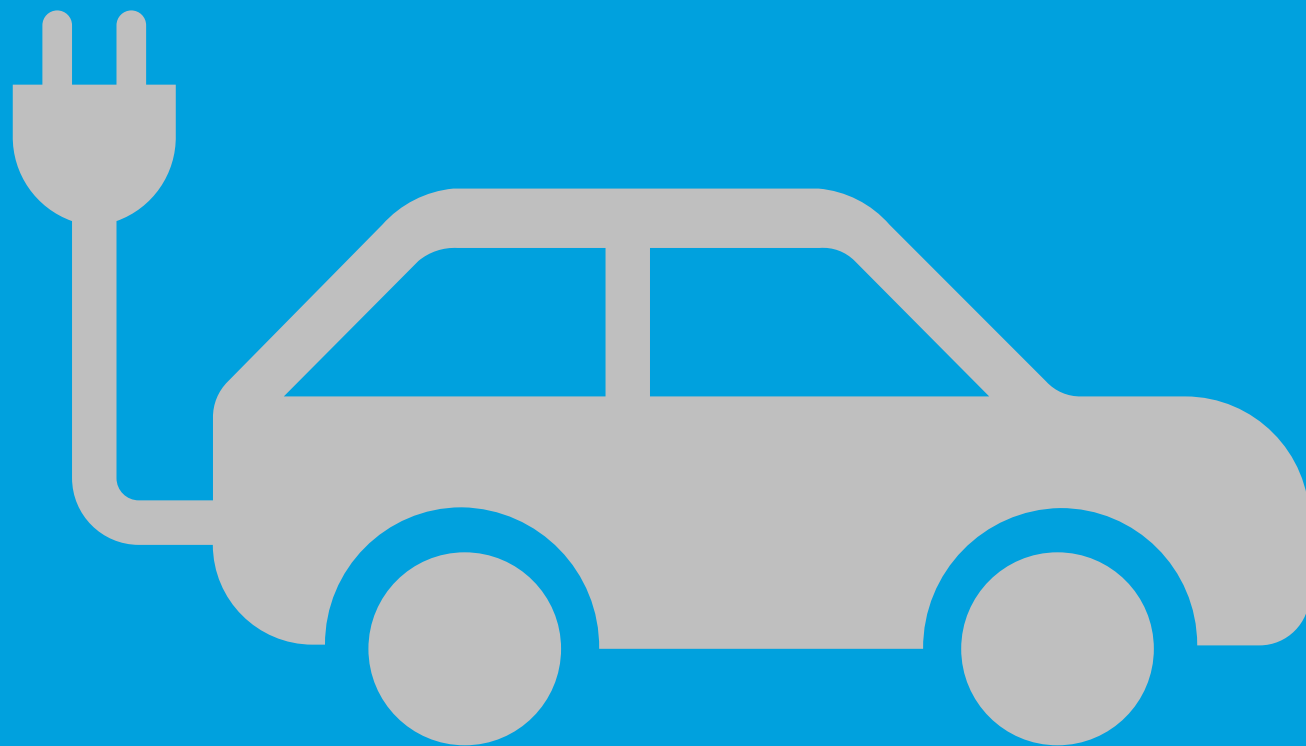


Q34. How interested are you in the following benefits of a connected vehicle if it meant sharing your own personal data and vehicle/operational data with the manufacturer or a third party?

Sample size: n= 910

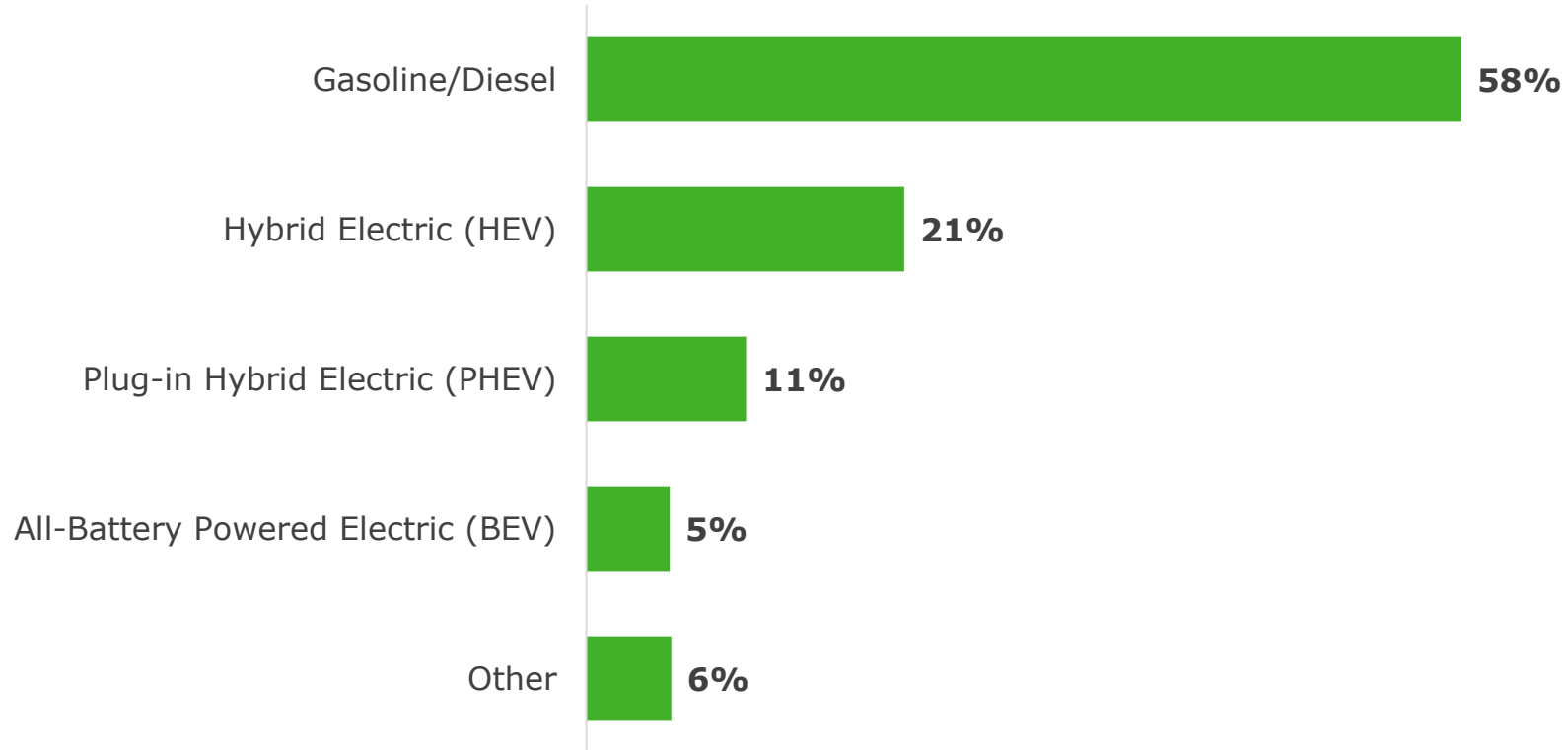
India

Vehicle electrification



More than a third of consumers are interested in electrified vehicles, (particularly hybrids) – are we moving fast enough toward an EV future?

Type of engine in next vehicle



Note: "Other" includes engine types such as compressed natural gas, ethanol, and hydrogen fuel cells; did not consider "don't know" responses

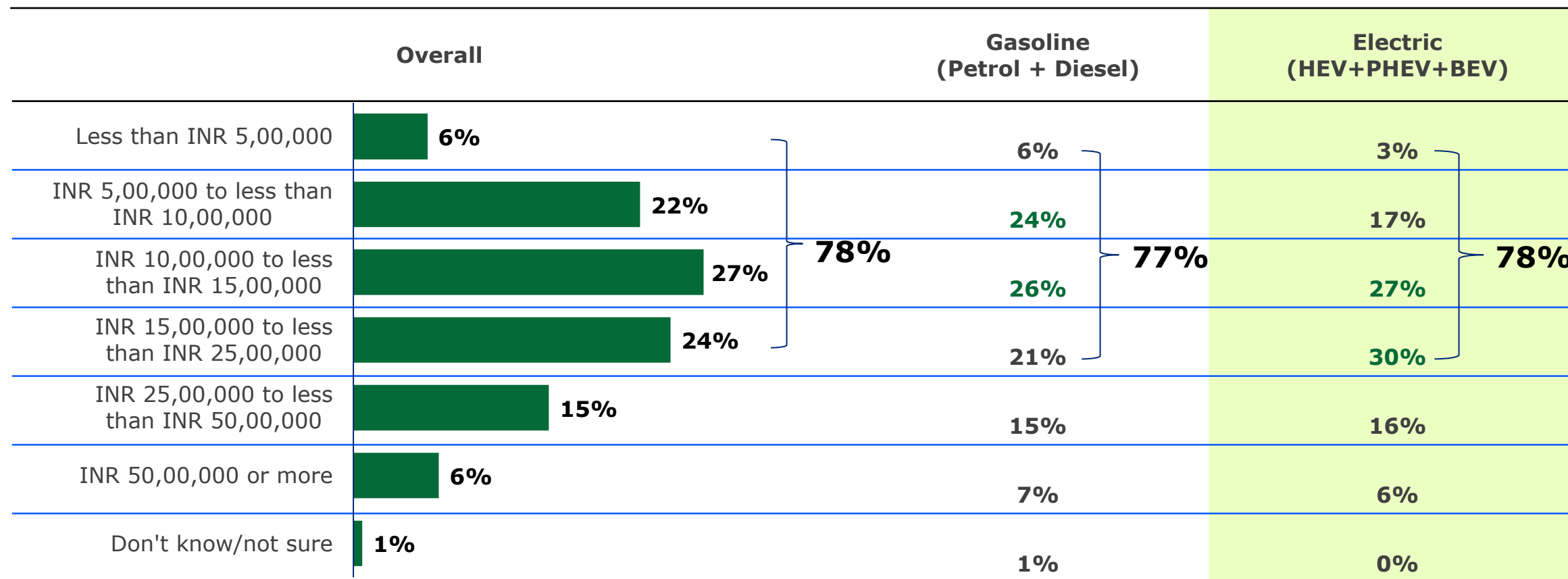
Q25. What type of engine would you prefer in your next vehicle?

Sample size: n= 895

India

EV intenders are not that different than their ICE peers in terms of what they expect to pay for their next vehicle (i.e., less than INR 25 lakhs).

Price ranges in which consumers prefer to shop for next vehicle

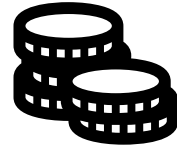


Q21. In which of the following price ranges will you be shopping for your next vehicle? (Please indicate what you would expect to pay after any discounts and/or incentives that might be available).

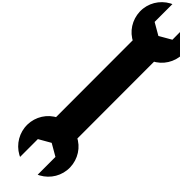
Sample size: Overall= 910; Gasoline= 515; Electric= 330

India

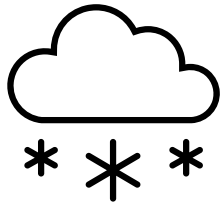
The draw for EVs centers on a consumer perception that they are better for environment while lowering fuel costs.



53%
Lower fuel cost



45%
Less maintenance



59%
Concern about
climate change /
reduced
emissions



46%
Better driving
experience



29%
Government
incentives / stimulus
programs



46%
Concern about
personal health



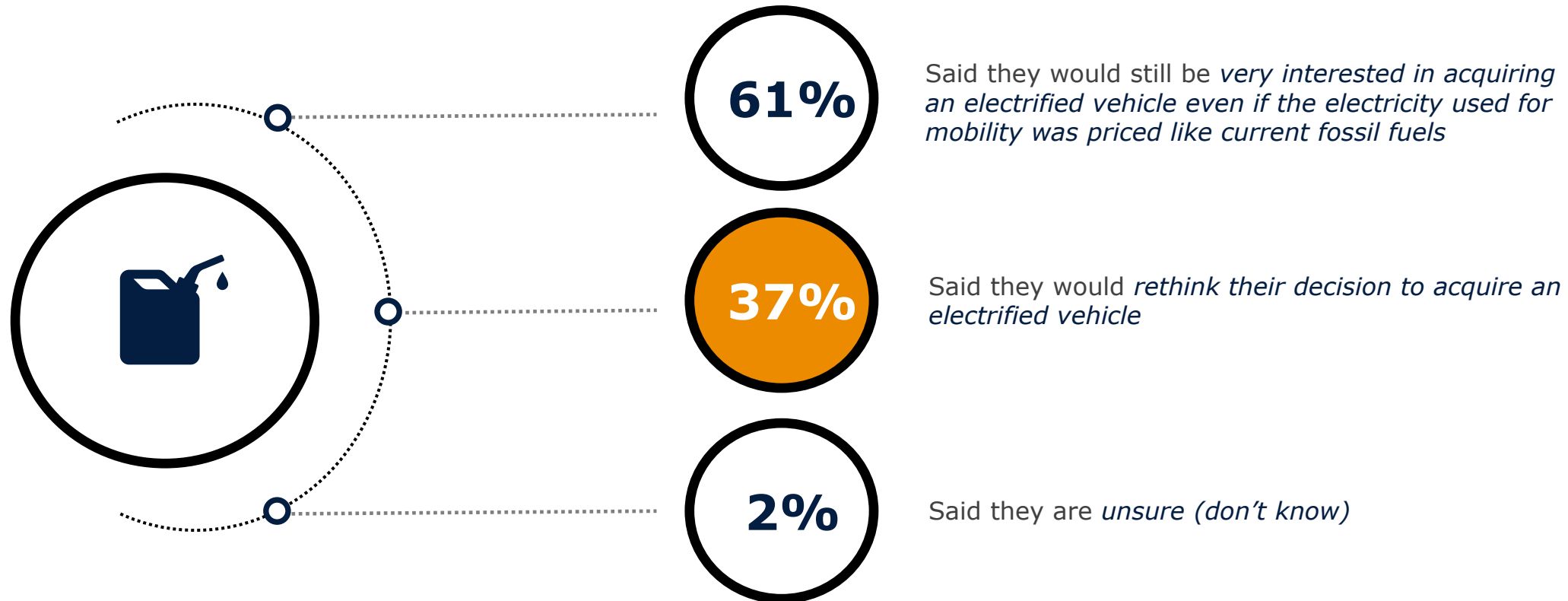
21%
Potential for extra
taxes/levies applied
to internal
combustion vehicles

Q26. Please rank the following factors in terms of their impact on your decision to acquire an electrified vehicle (highest to lowest).

Sample size: n= 331

More than one-third of EV intenders would rethink their purchase decision if the price of electricity was similar to fossil fuels.

Decision to purchase an electrified vehicle change if the electricity used for mobility was priced similar to current fossil fuels



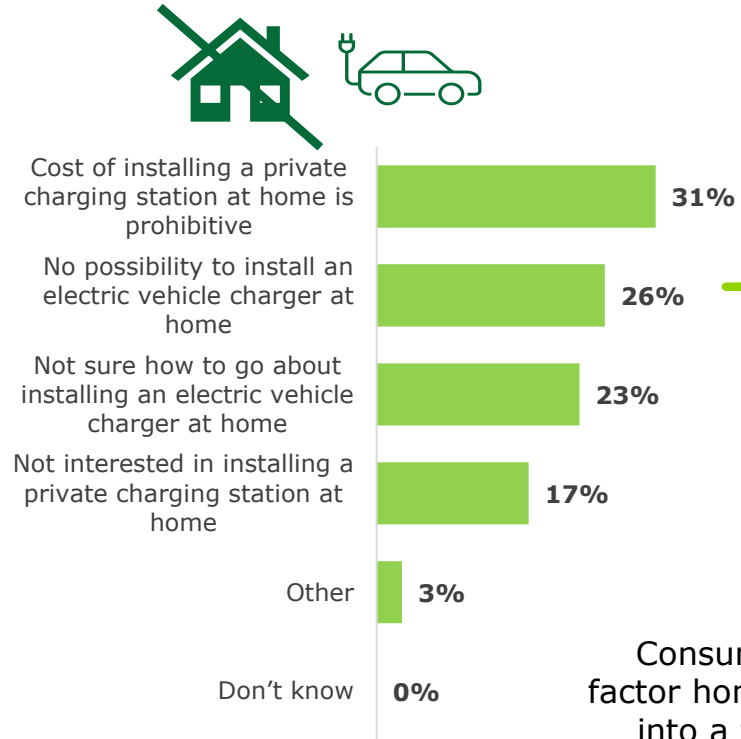
Q30. Would your decision to purchase an electrified vehicle change if the electricity used for mobility was priced similar to current fossil fuels?

Sample size: n= 143

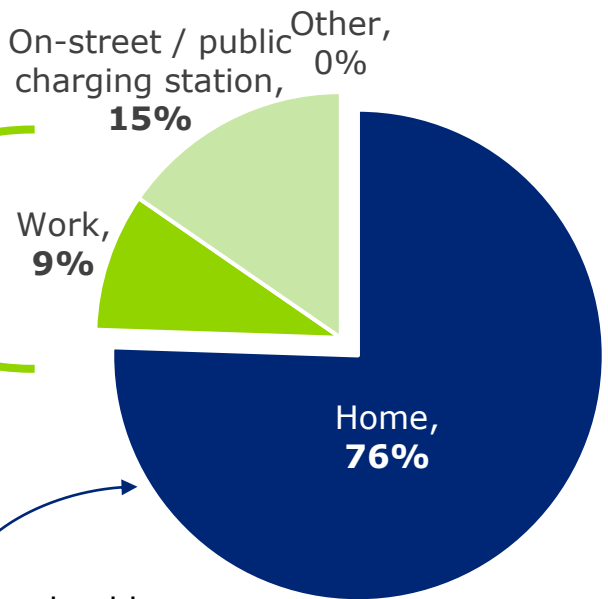
India

Most intenders plan to treat their EVs like their smartphones (charging at home, at night) which means incurring the cost of charging equipment.

Reasons for not charging the electrified vehicle at home

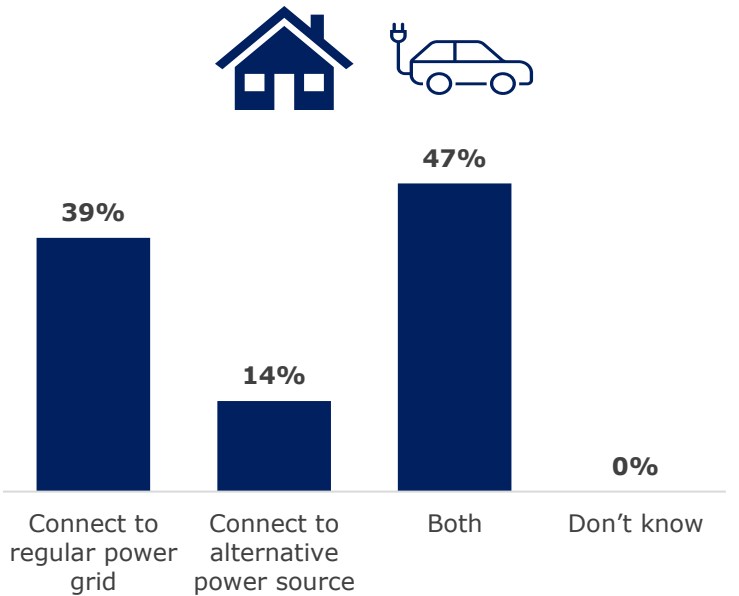


Expecting to charge electrified vehicle most often at...



Consumers should factor home charging into a total cost of ownership model

Intending to charge electric vehicles at home using...



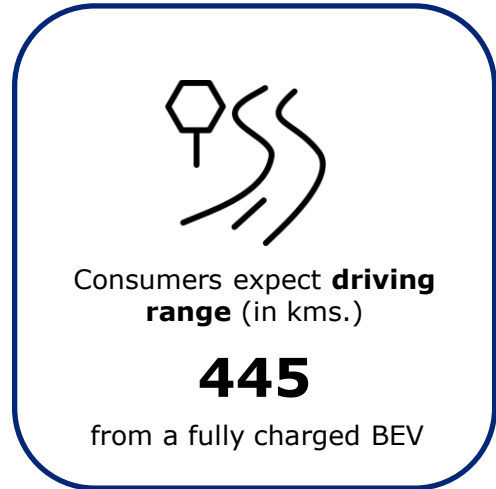
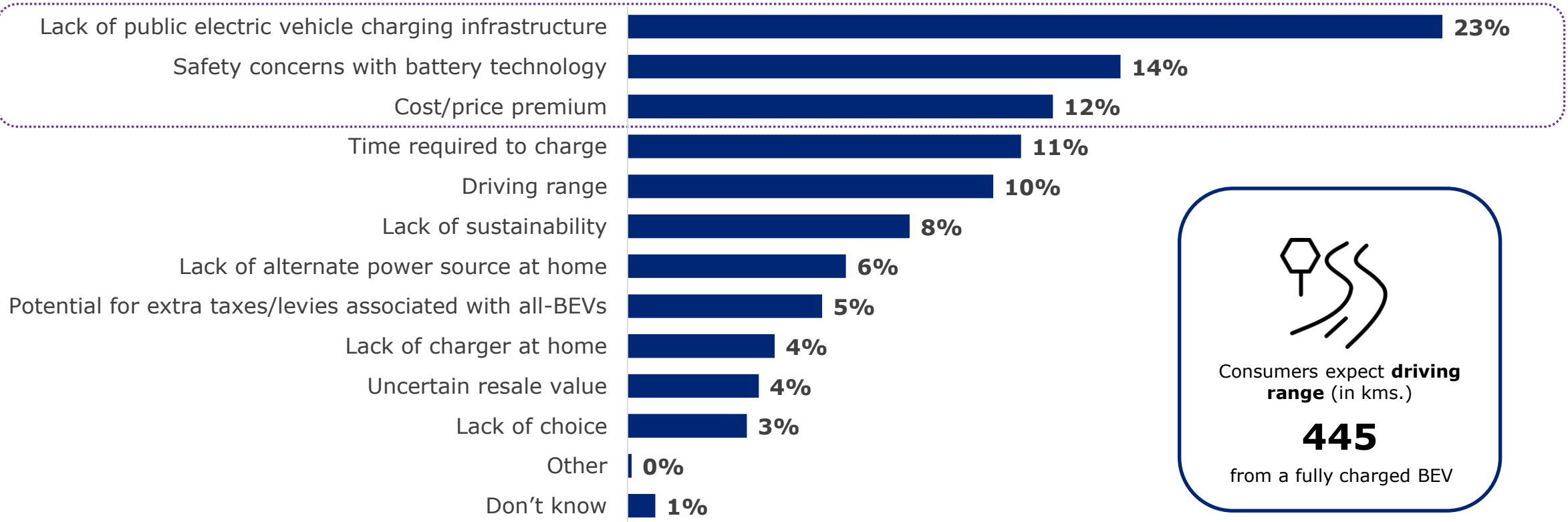
Questions remain around the pressure EVs will create on the existing power grid

Q27. Where do you expect to charge your electrified vehicle most often?; Q28. How do you intend to charge your electrified vehicle at home?; Q29. What is the main reason you do not intend to charge your electrified vehicle at home?

Sample size: n= 143 [Q27]; 108 [Q28]; 35 [Q29]

Consumers are still being turned off EVs due to lingering concerns around a lack of public charging infrastructure, safety of battery technology, and cost.

Greatest concern regarding all battery-powered electric vehicles



Q31. What is your greatest concern regarding all battery-powered electric vehicles?

Sample size: n= 910

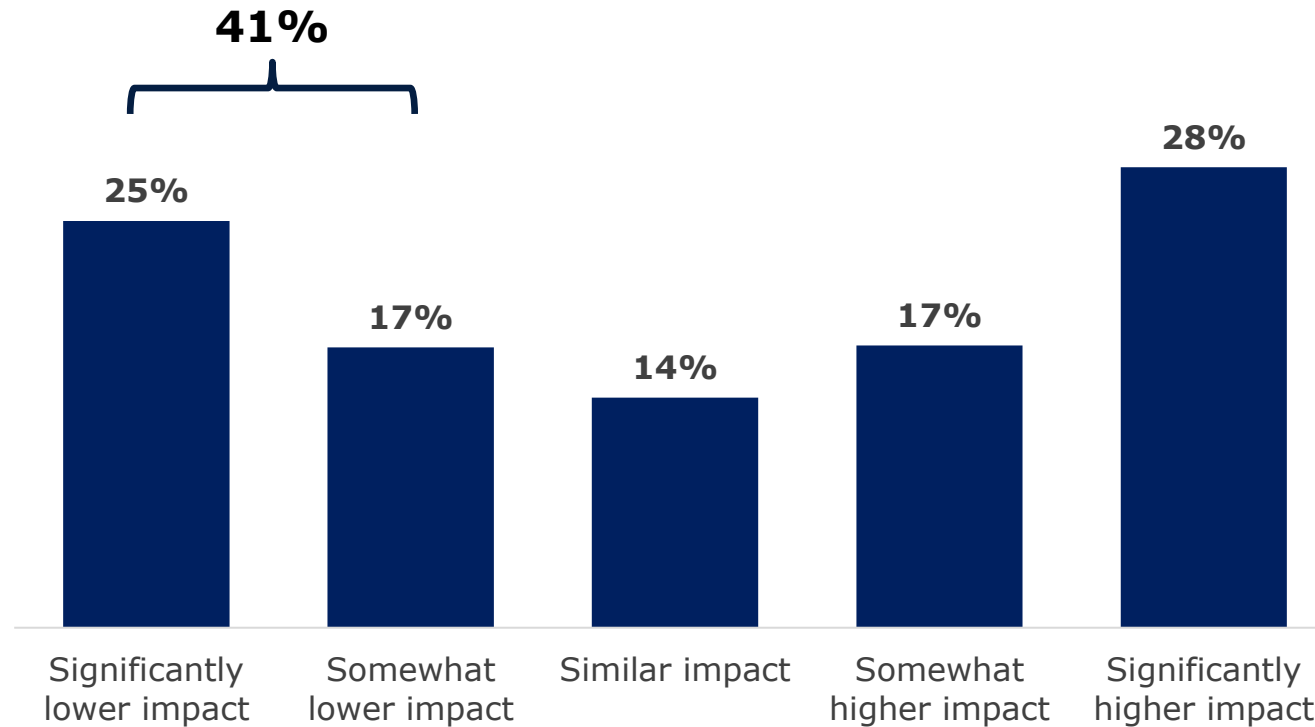
Q32. How much driving range would a fully charged all-battery electric vehicle need to have in order for you to consider acquiring one?

Sample size: n= 861

India

Finally, consumers appear to be divided on whether EVs are net positive vs. ICE engines to the environment.

Comparison of all-battery electric vehicles with internal combustion vehicles from an environmental impact point of view

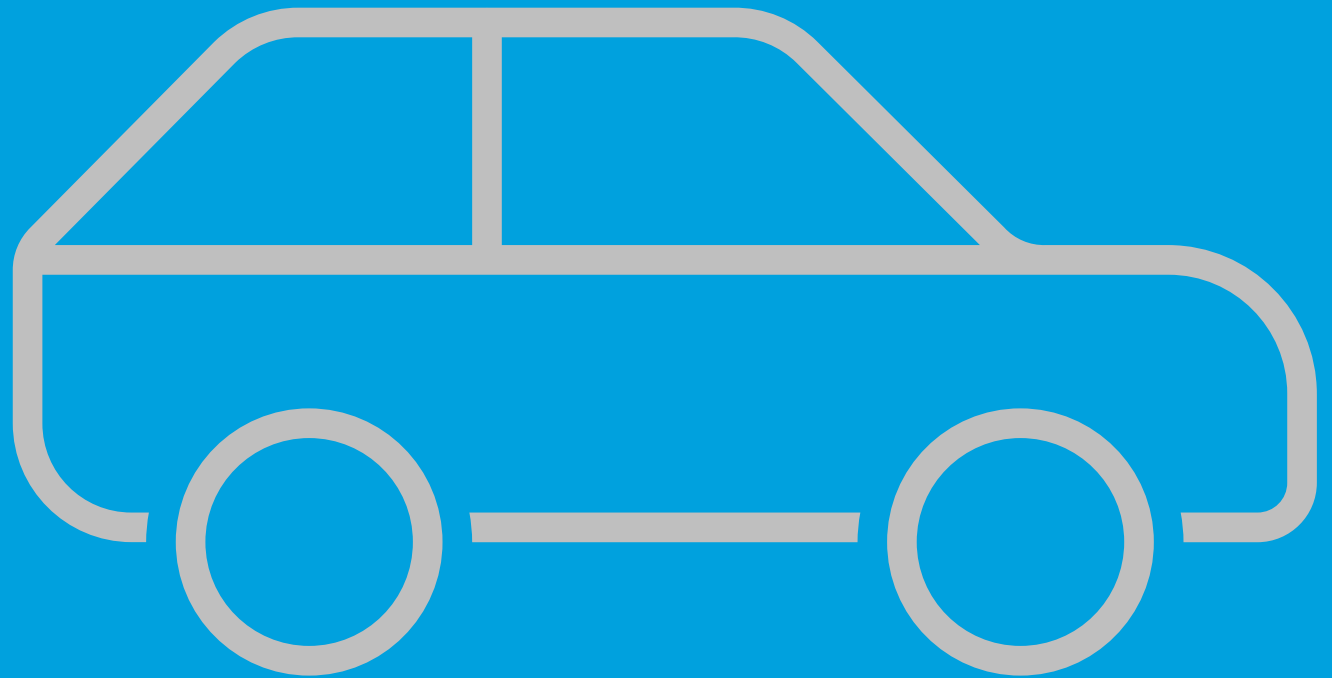


Note: Did not consider "Don't know" responses

Q33. In your opinion, how do all-battery electric vehicles compare to internal combustion vehicles from an environmental impact point of view?

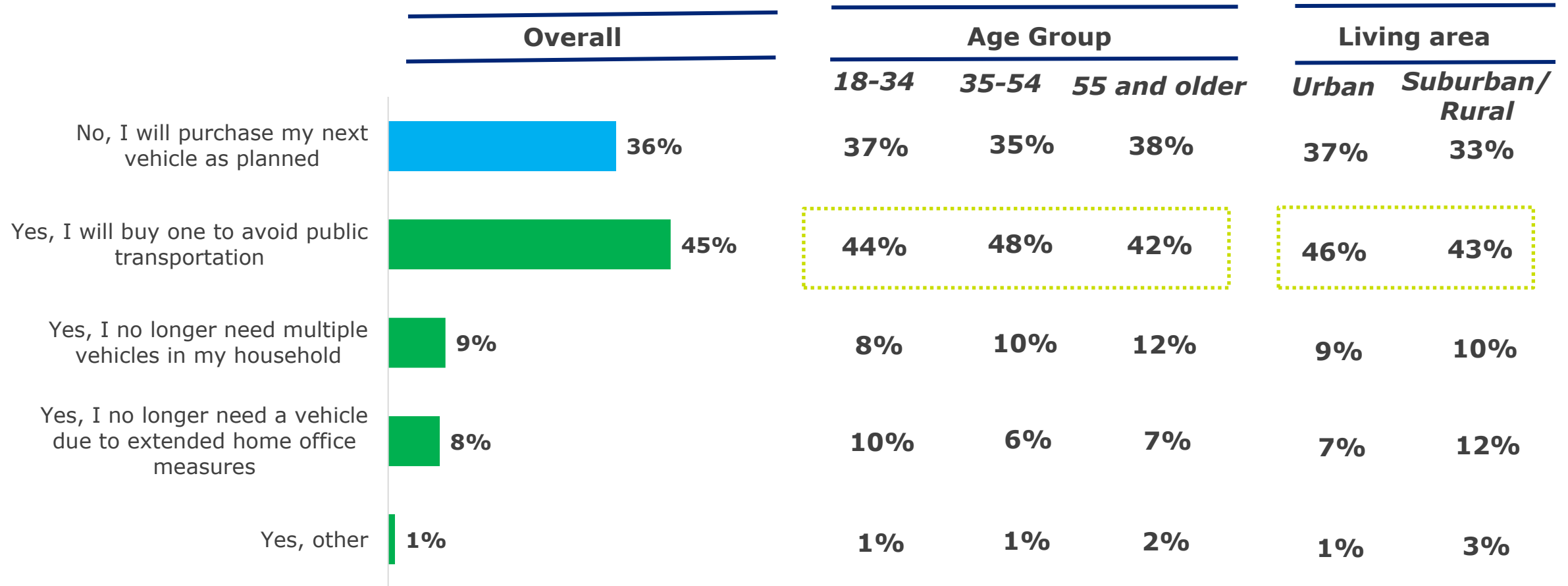
Sample size: n= 894

Future vehicle intentions



COVID-19 has a higher impact on consumers, across age groups and living area, as they plan to buy their next vehicle to avoid public transport.

COVID-19 to impact next vehicle purchase



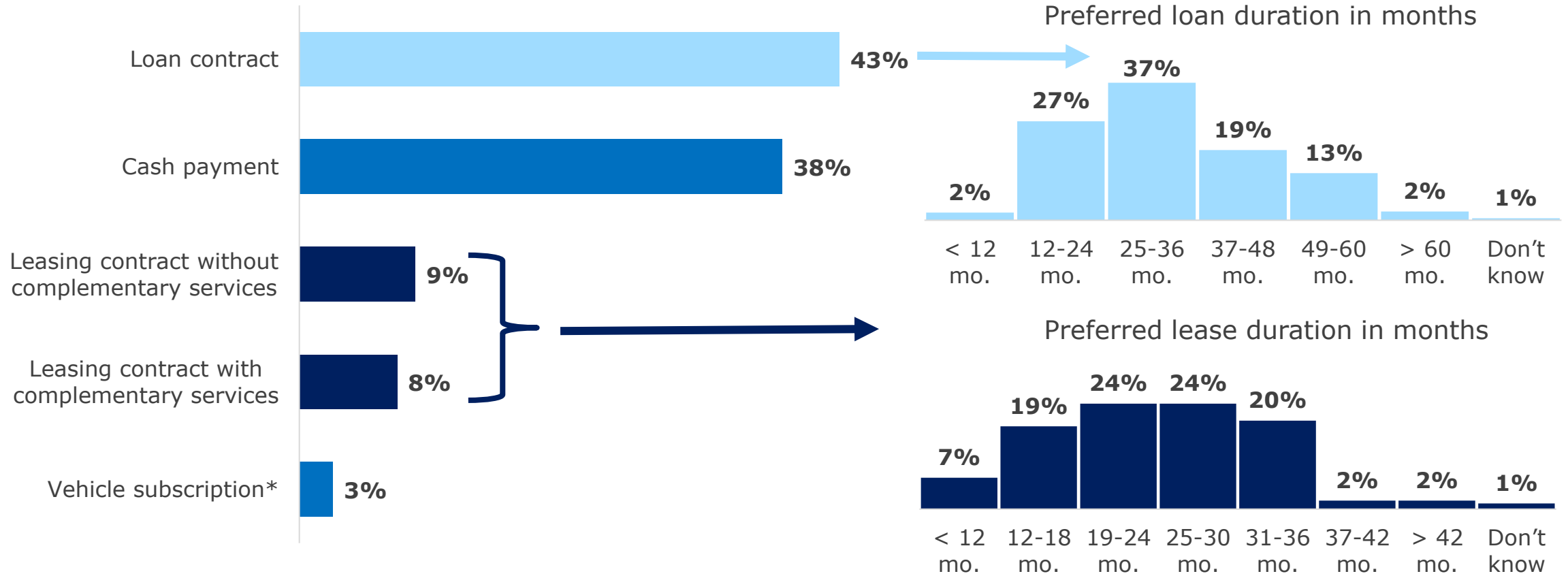
Q15. Has the global COVID-19 pandemic had an impact on your decision to purchase your next vehicle?

Sample size: n= 1,006 [overall]; 490 [18-34], 343 [35-54], 173 [55 and older]; 806 [urban], 200 [suburban/rural]

India

4 in 10 consumers plan to take out a loan for their next vehicle with preferred term durations ranging from 1-4 years.

Planning to pay for next vehicle through



Note: "complementary services" include service and maintenance, insurance; * includes mid/long-term rental contract/other

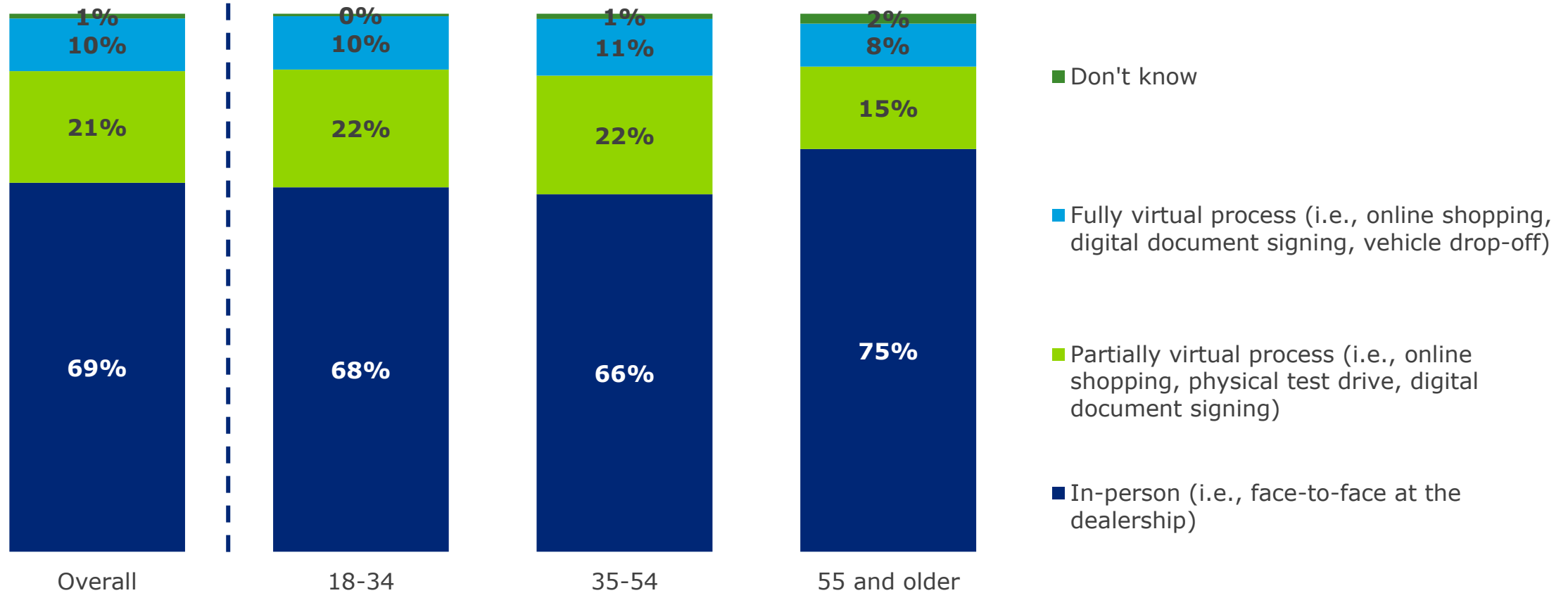
Q22. How do you plan to pay for your next vehicle?; Q23. What is your preferred finance duration?; Q24. What is your preferred lease duration?

Sample size: n= 910 [Q22]; 387 [Q23]; 153 [Q24]

India

Consumers still want to acquire their next vehicle via an in-person experience.

Most preferred way to acquire next vehicle

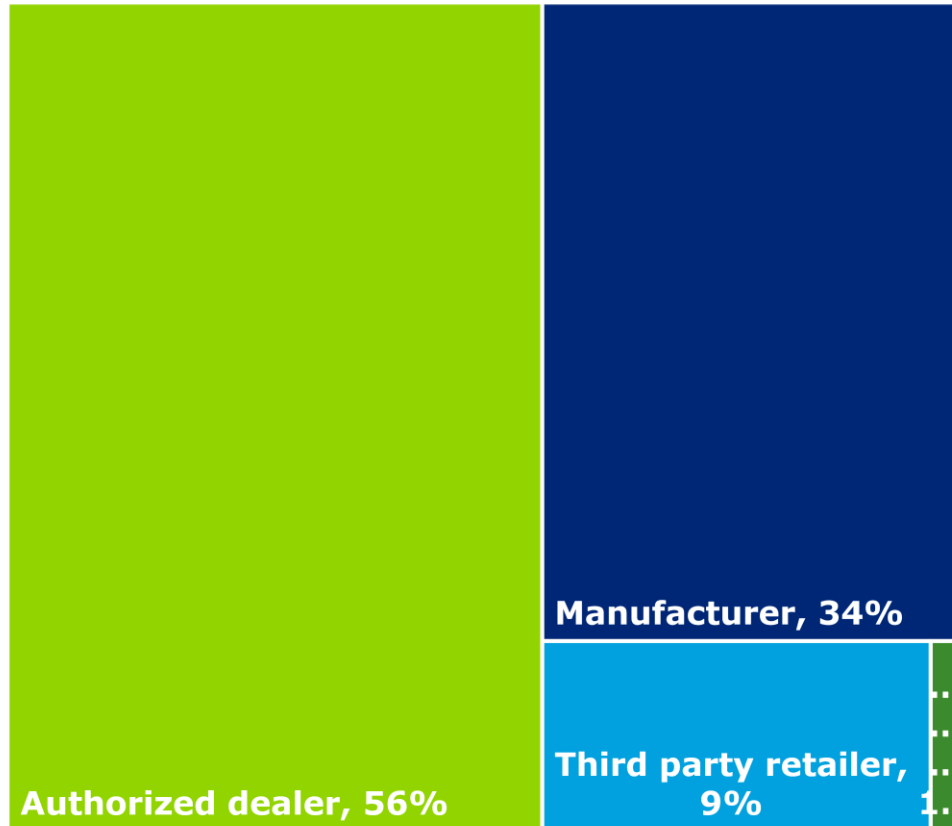


Q35. How would you most prefer to acquire your next vehicle?
Sample size: n= 910 [overall]; 434 [18-34], 313 [35-54], 163 [55 and older]

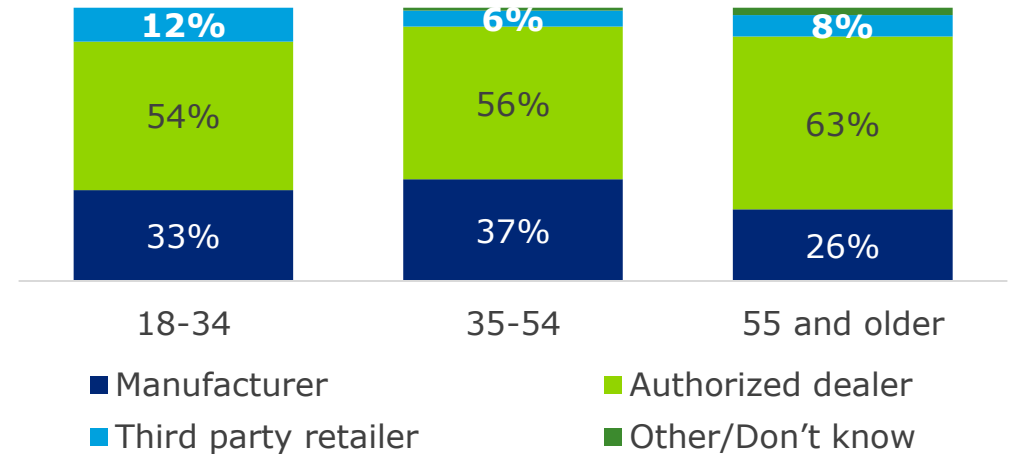
Even consumers who plan to purchase virtually prefer to buy from dealers. Interest in third party retailers is higher among used vehicle buyers.

Prefer to acquire next vehicle via a virtual process from

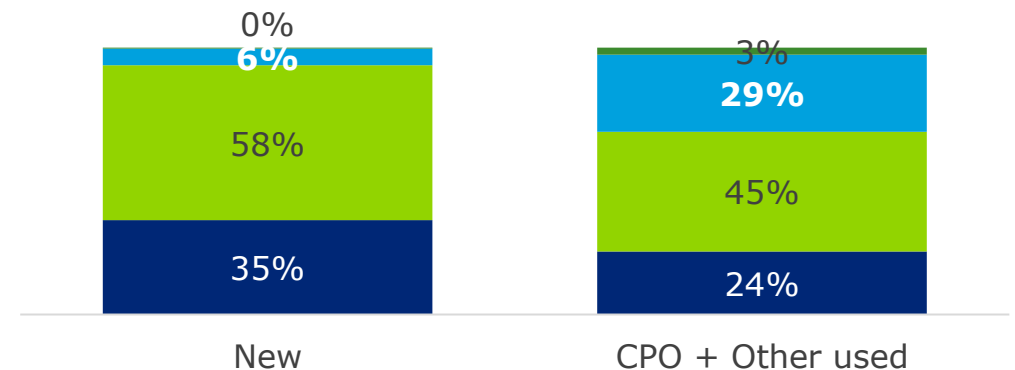
Overall



Age group



Type of next vehicle

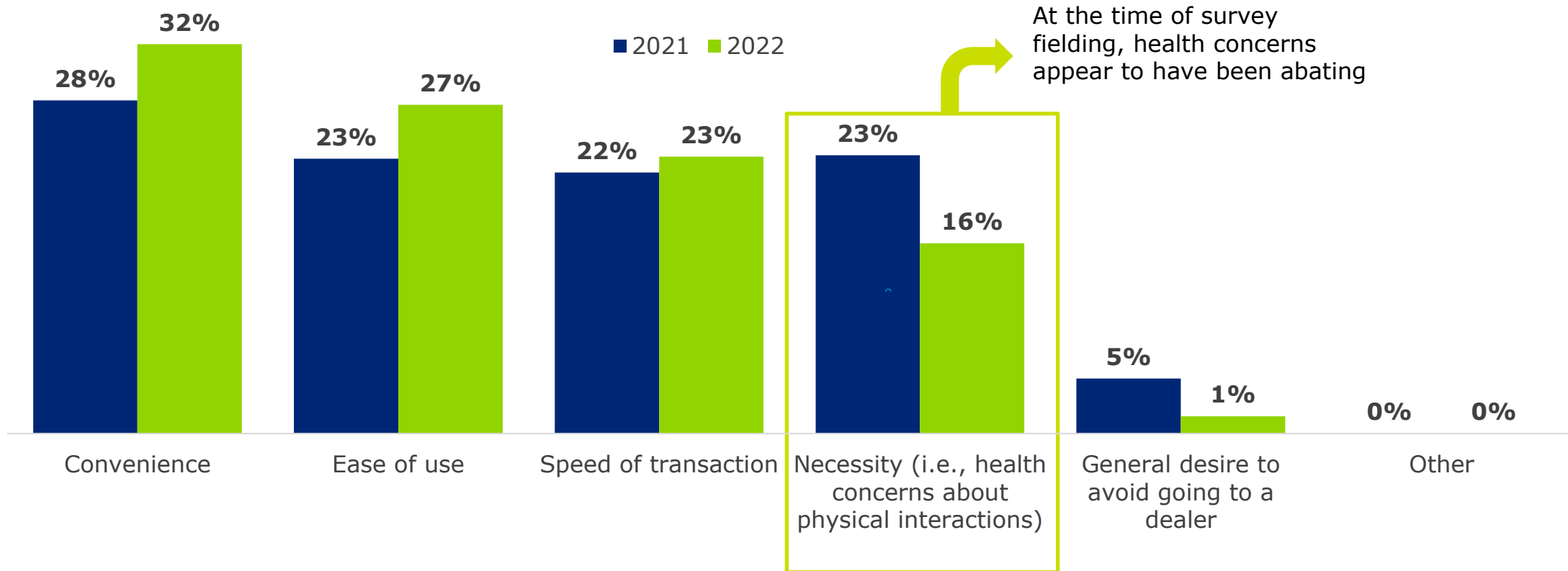


Q36. From whom would you most prefer to acquire your next vehicle via a virtual process?
 Sample size: n= 278 [overall]; 138 [18-34], 102 [35-54], 38 [55 and older]; new [240], CPO/Other used [38]

India

Convenience coupled with ease of use are the main reasons for consumers to consider a virtual process for acquiring their next vehicle.

Main reason to acquire next vehicle via a virtual process

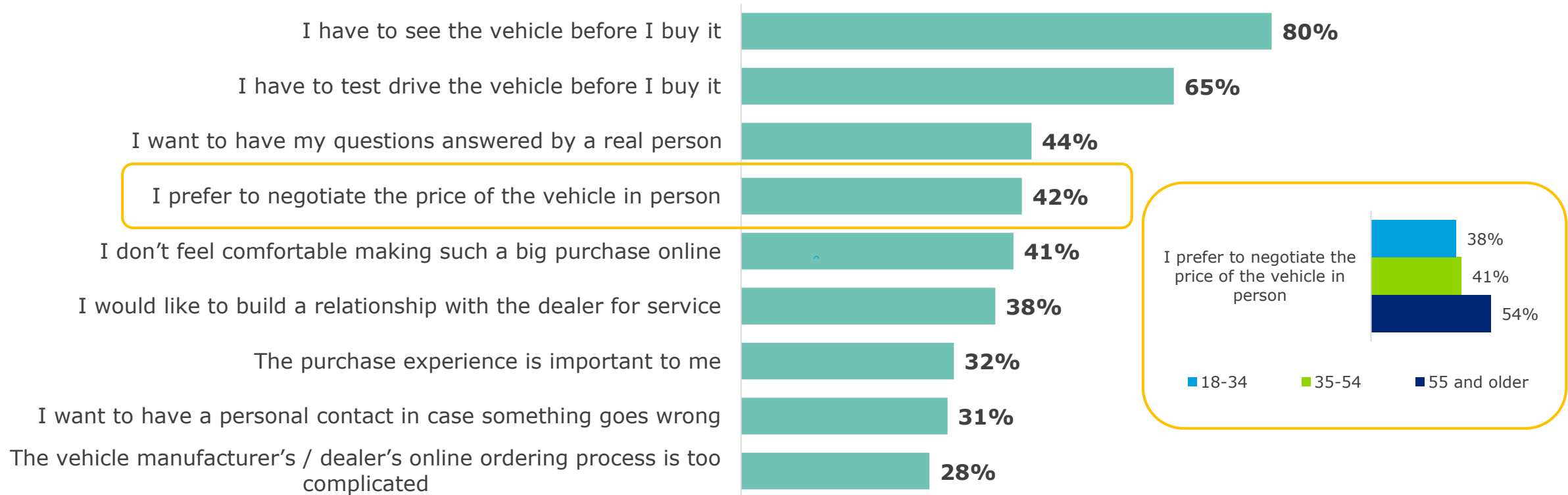


Q37. What is the main reason you would prefer to acquire your next vehicle via a virtual process?

Sample size: n= 278 [2022], 350 [2021]

But, at the end of the day, some things are simply hard to digitize as people still need to see/drive a vehicle before they buy it.

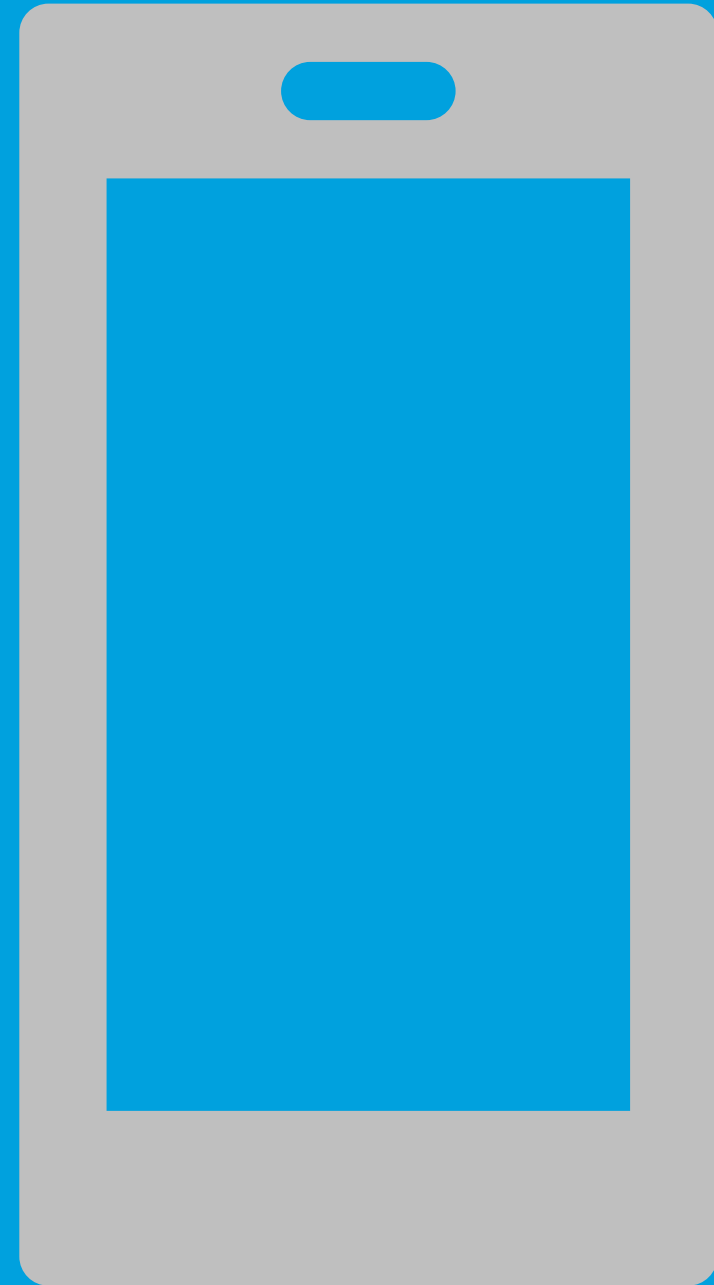
Main reasons for being not interested in acquiring next vehicle via virtual process



Q38. What are the main reasons you are not interested in acquiring your next vehicle via virtual process? (Select all that apply)

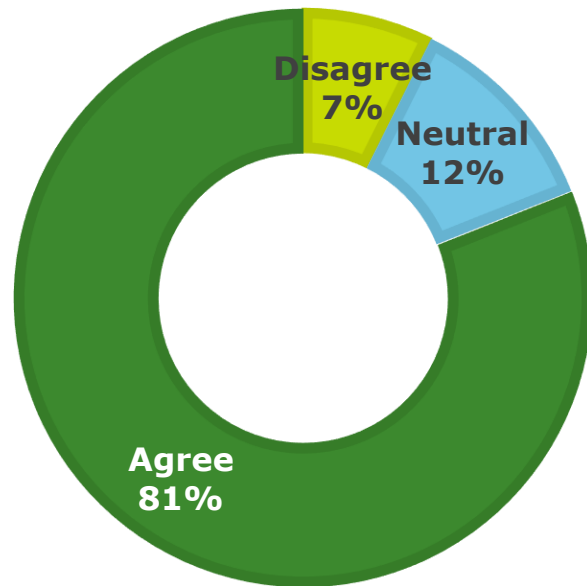
Sample size: n= 624

Mobility applications

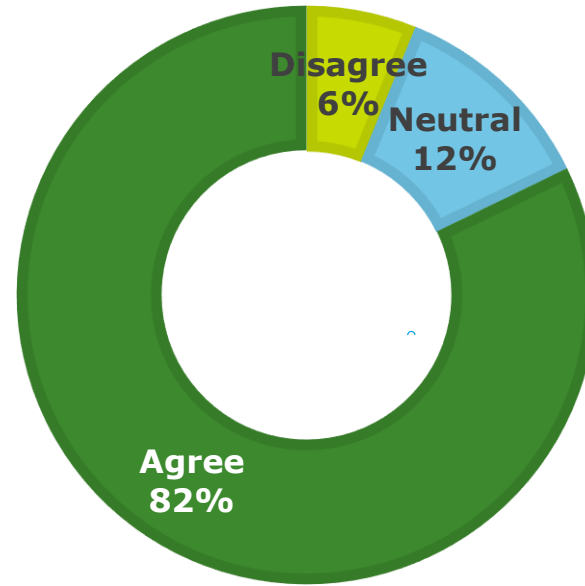


Room for improvement exists for mobility app providers in offering multiple services within the same app or risk consumers switching to different apps.

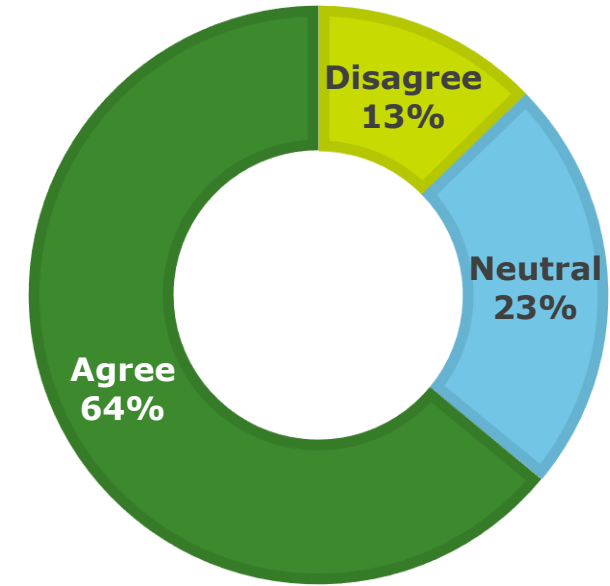
Percentage of consumers who think that



Available smartphone apps provide sufficient mobility services



Mobility apps should offer several different services within one app



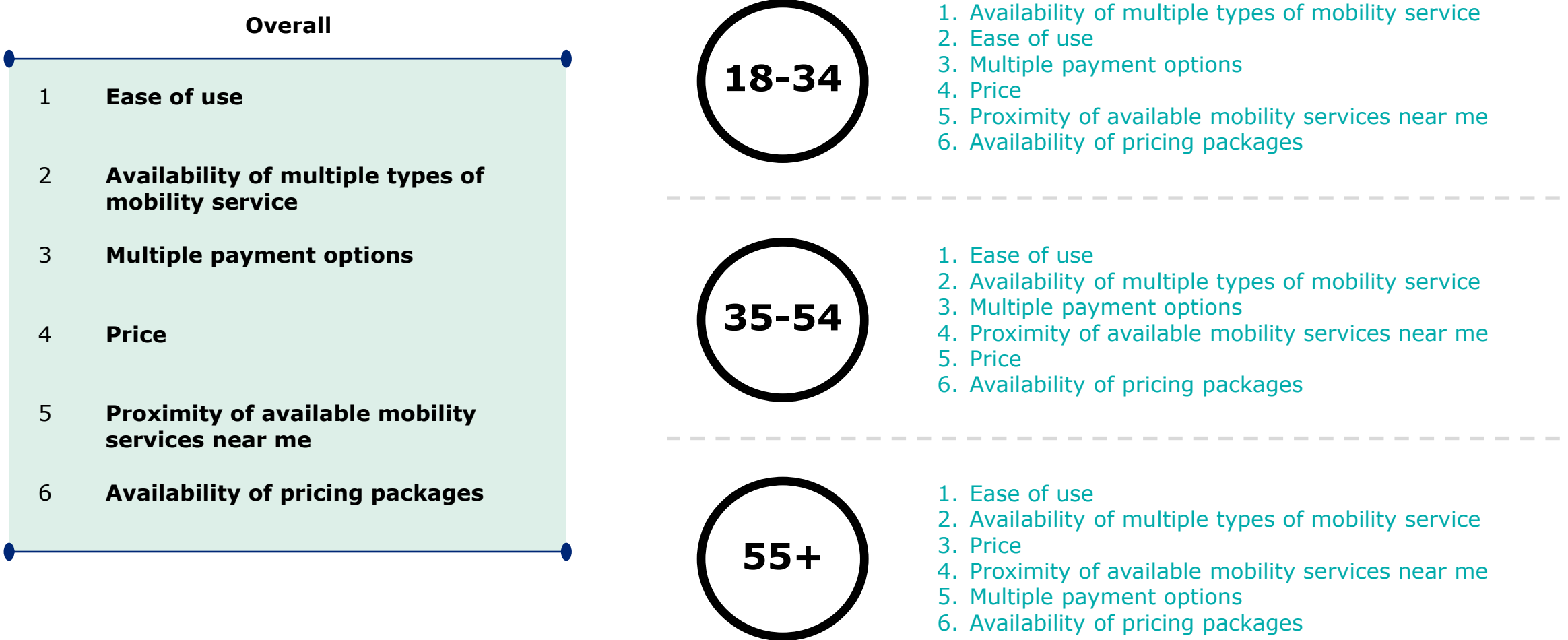
I don't mind switching apps to use different types of mobility services

Q39. To what extent do you agree/disagree with the following statements?

Sample size: n= 1,006

At the same time, consumers, across age groups, assign the highest importance to ease of use and types of services offered by the app.

Most important characteristics of a mobility app

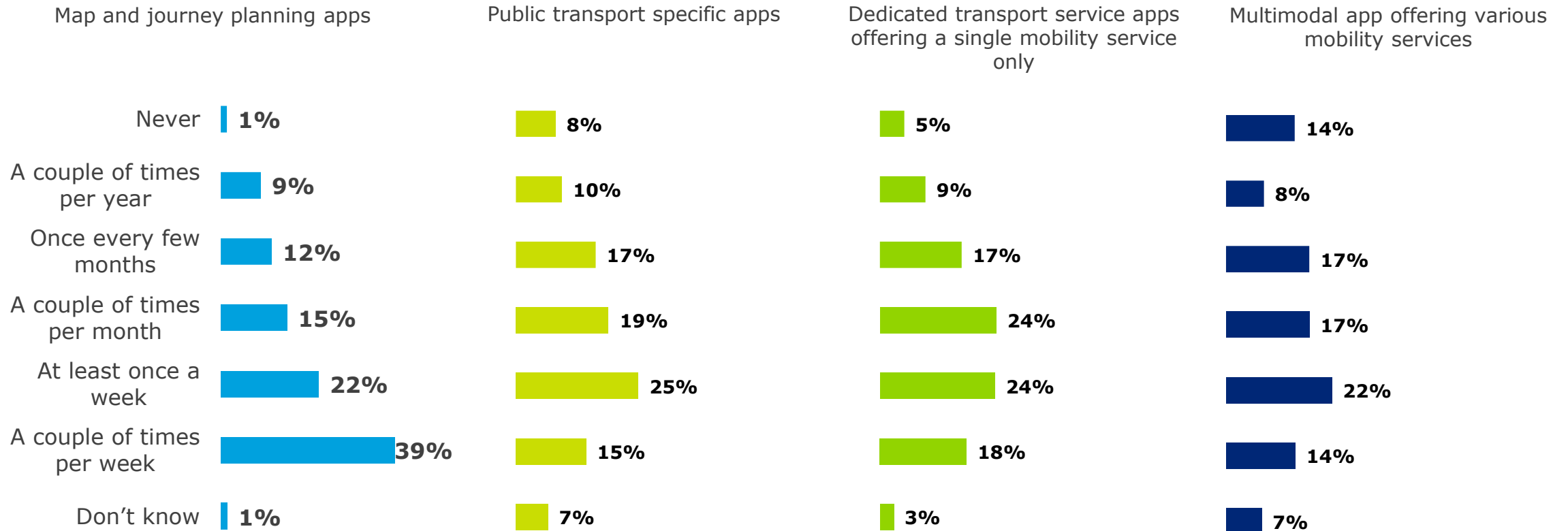


Q41. Please rank the following characteristics of a mobility app in order from most to least important.

Sample size: n= 1,006

Consumers plan to use map and journey planning apps more frequently than other transport-related apps.

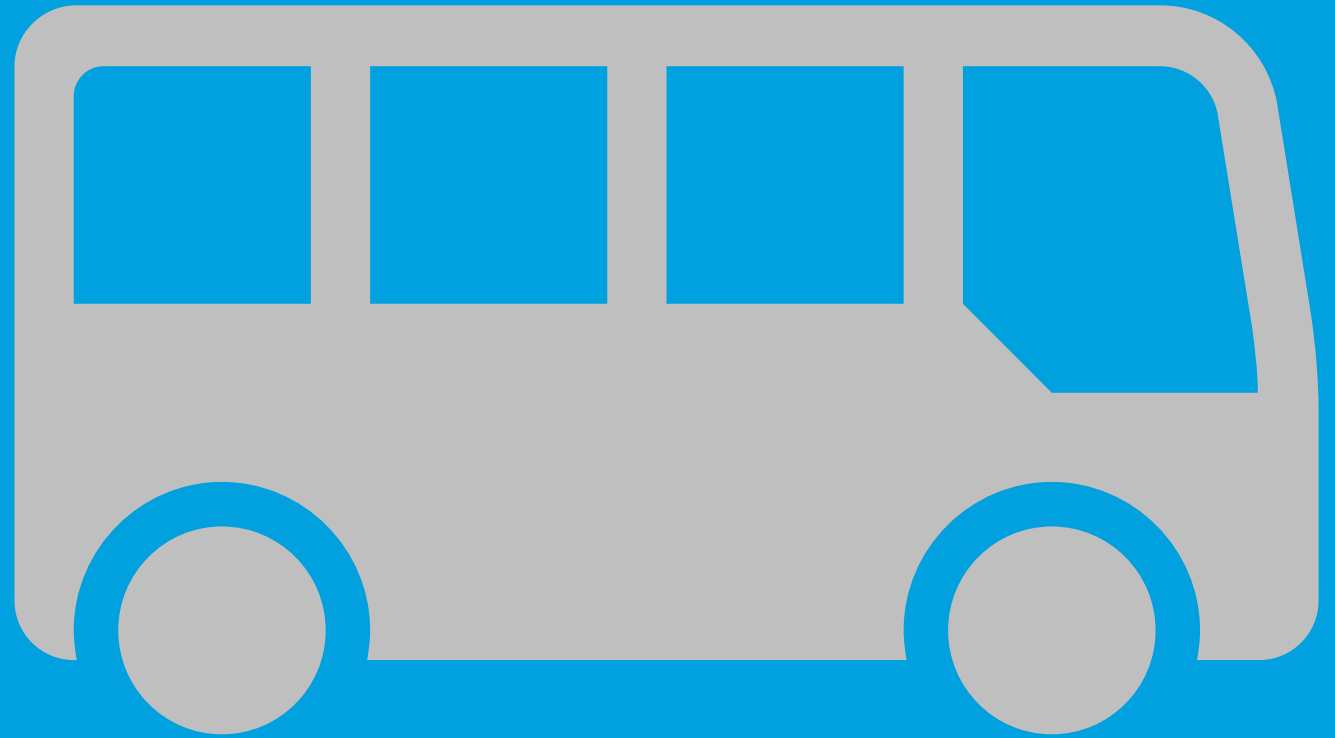
Types of mobility apps planning to use



Q40. Looking forward, how often do you intend to use the following types of mobility apps?

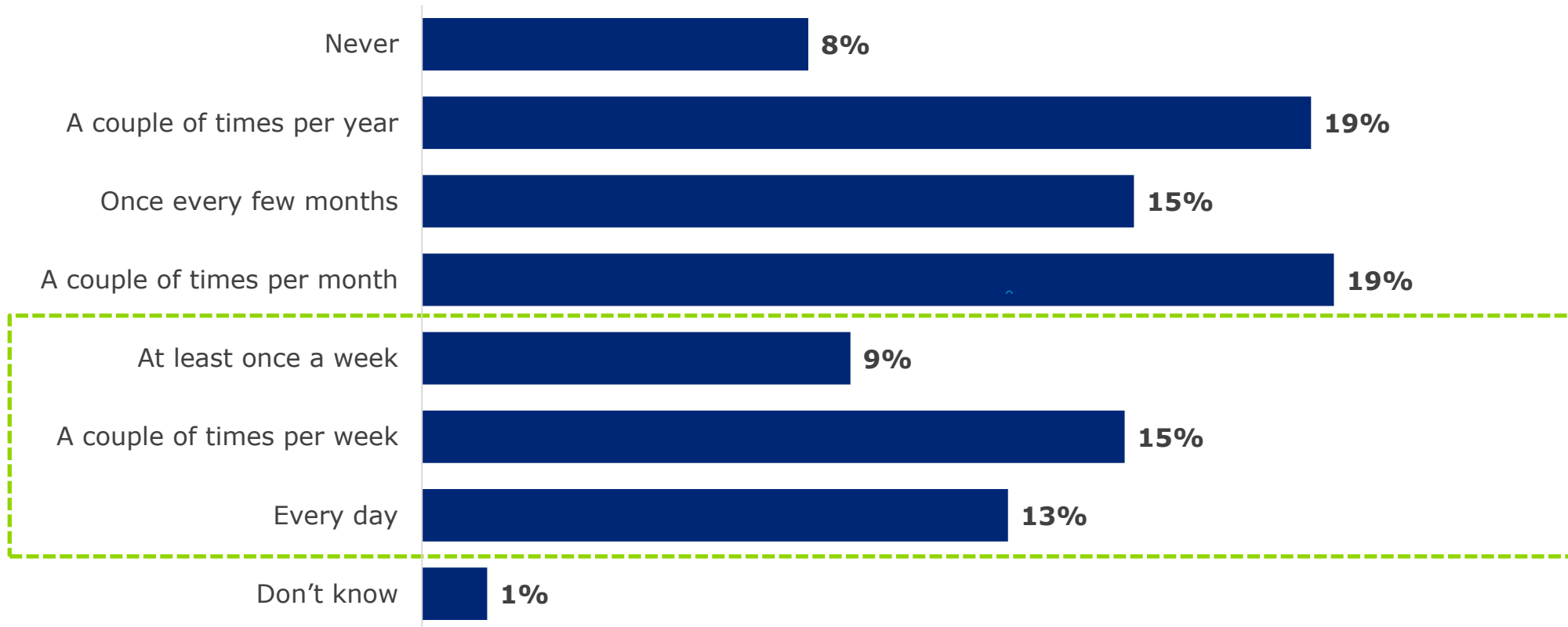
Sample size: n=1,006

Mobility services



More than a third of consumers use multiple transport modes in the same trip at least once a week. Only 8% NEVER use multiple modes in the same trip.

Use of multiple modes of transportation in the same trip



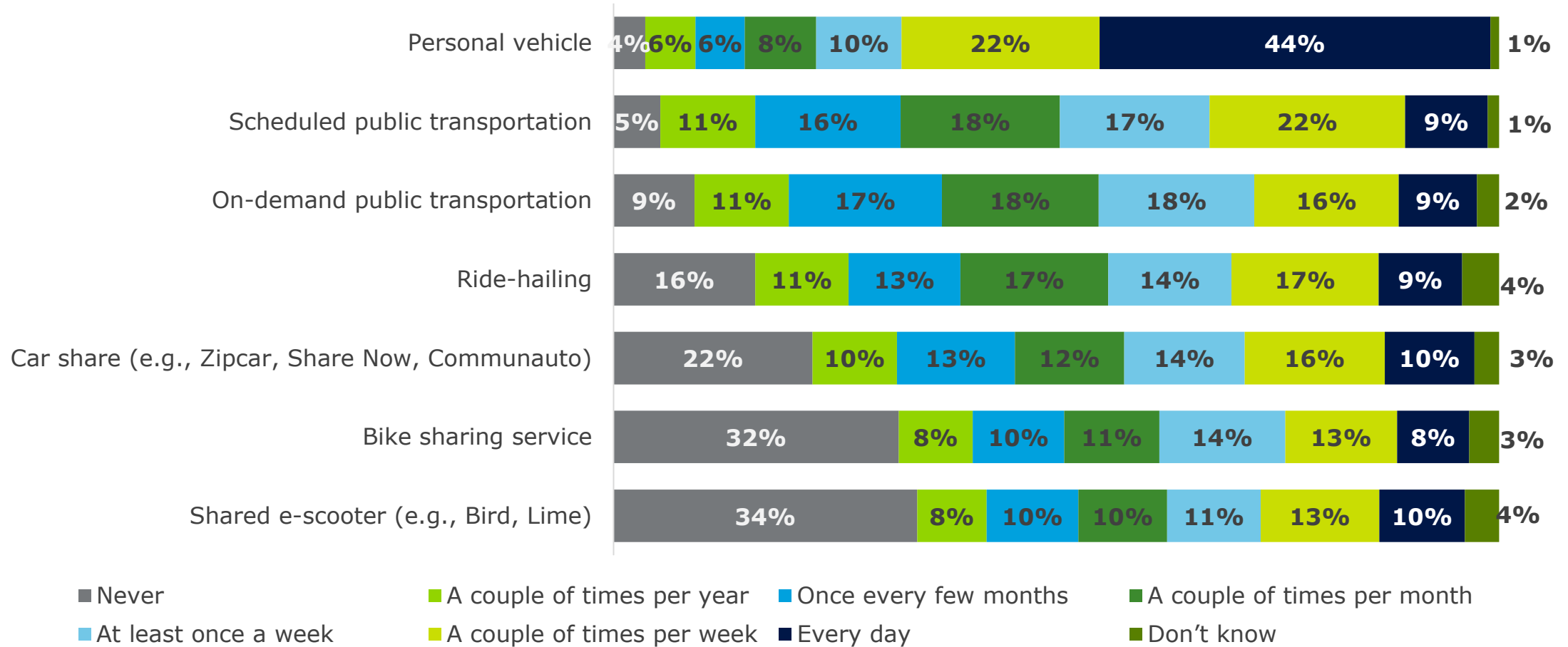
Q43. How often do you use multiple modes of transportation in the same trip (e.g., a trip using a subway, commuter train and your own vehicle)?

Sample size: n= 1,006

India

Personal vehicles remain the most used transportation mode while sharing services like e-scooters/bikes are used relatively less often.

Frequency of usage of different modes of transportation



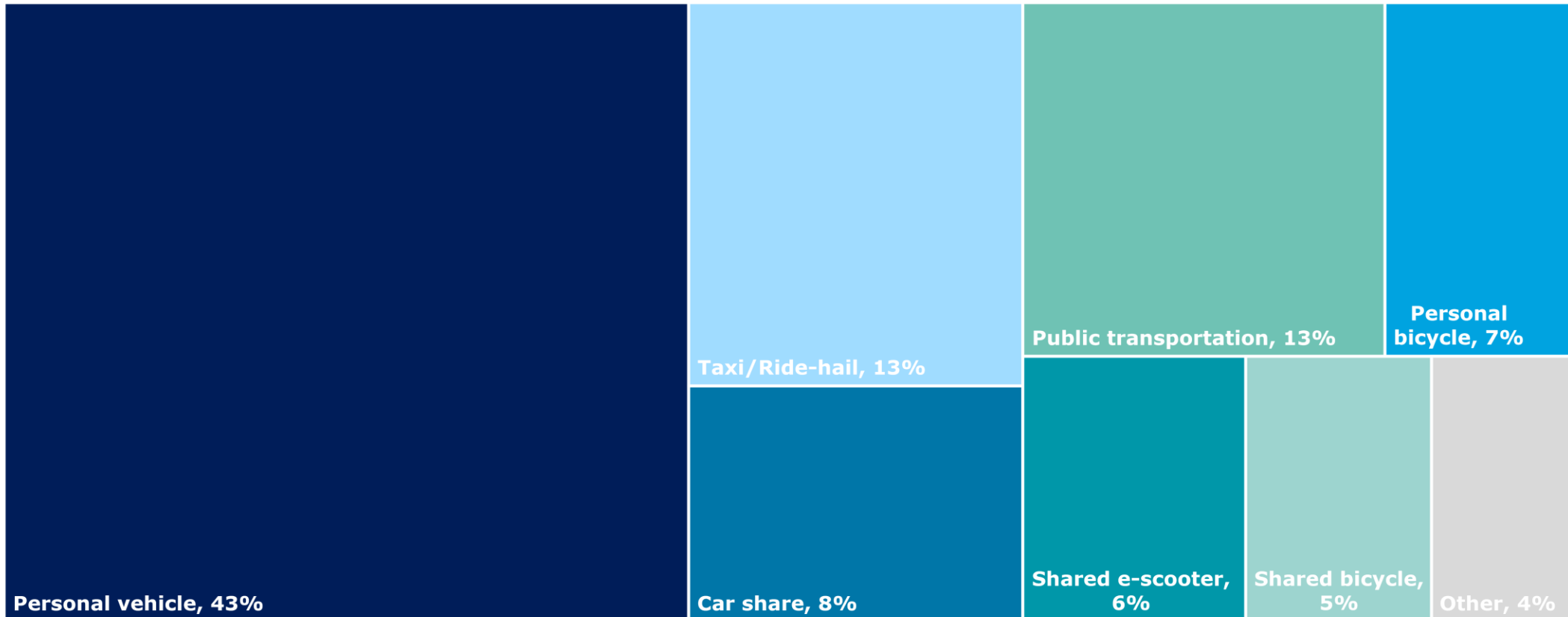
Q42. How frequently do you typically use the following modes of transportation?

Sample size: n=1,006

India

Going forward, personal vehicles are likely to remain the preferred mobility choice for consumers.

Going forward, percentage of mobility needs will be met by



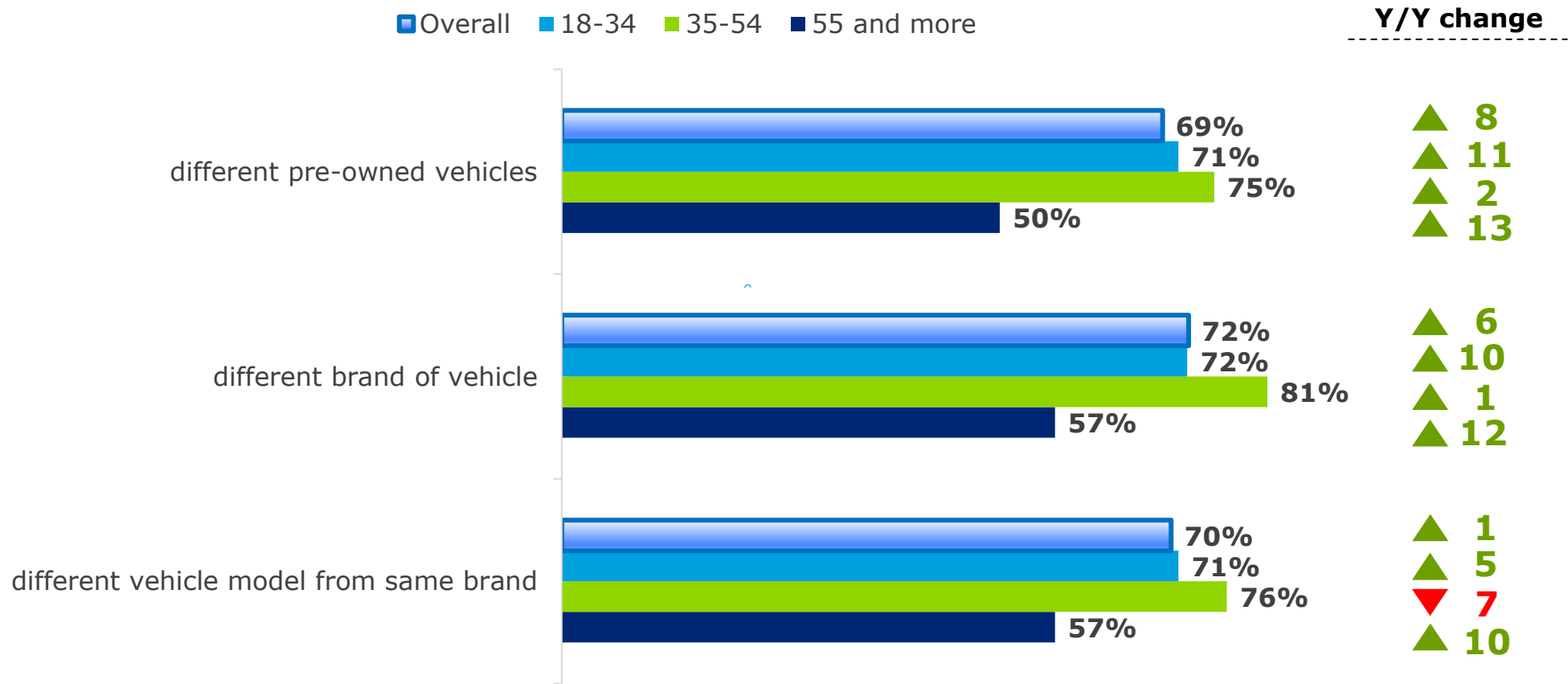
Q44. Going forward, what percentage of your mobility needs will be addressed by each of the following types of transportation?

Sample size: n= 1,006

India

Middle-aged consumers are interested in subscription services: different brands, different models from same brand, and pre-owned vehicles.

Percentage of consumers who are somewhat/very interested in a subscription service where they have the convenience and flexibility to periodically opt for ...



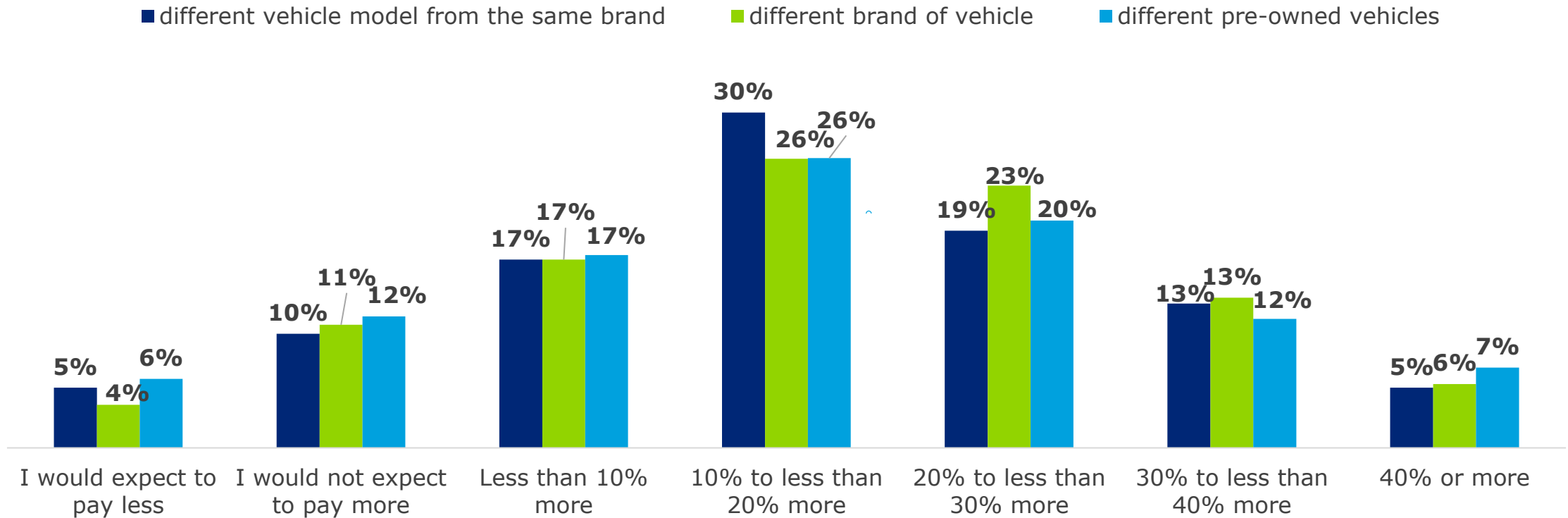
Q45. How interested are you in each of the following scenarios?

Sample size: n= 1,006 [Overall]; 490 [18-34], 343 [35-54], 173 [55 and older]

India

Consumers are willing to pay more for a subscription with more than 4 in 10 saying they would pay up to 20% more than a regular lease.

Percentage of consumers who are willing to pay for ...



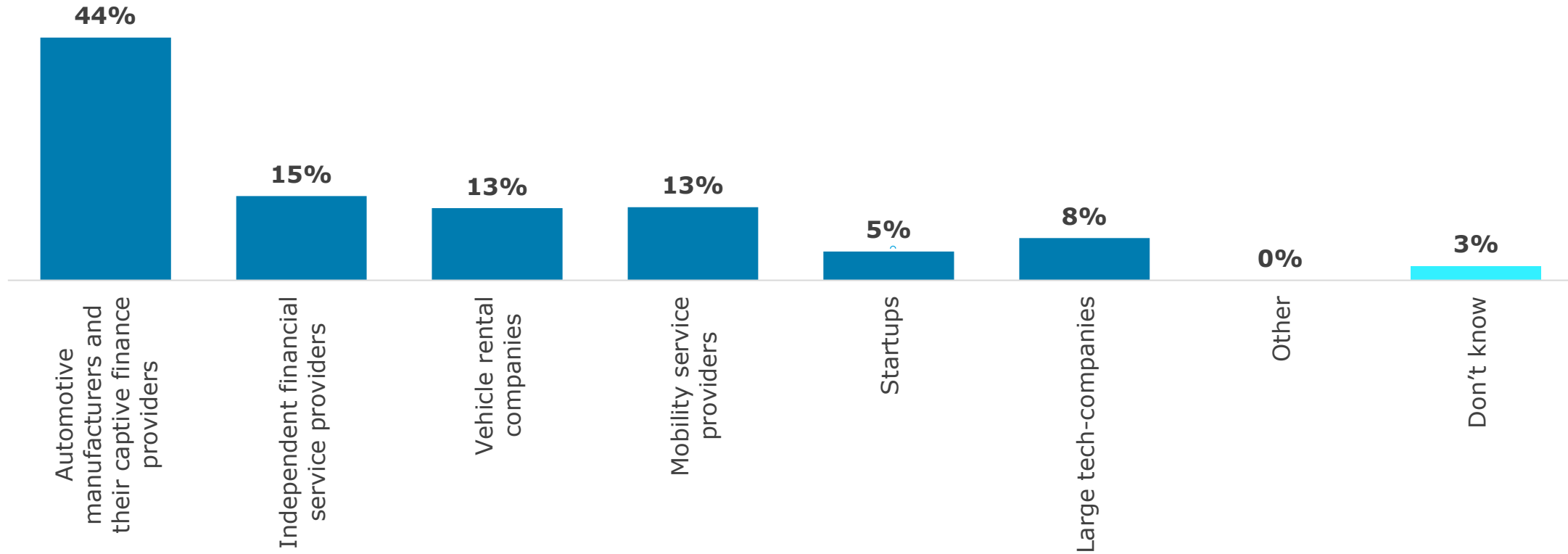
Q46. How much would you be willing to pay for each of the following services as compared to a regular vehicle lease?

Sample size: n= 893

India

OEMs are the most preferred choice to offer a “vehicle-as-a-service” solution in the market.

Most trusted provider to offer a “vehicle-as-a-service” solution



Q48. Which of the following providers would you most trust to offer a “vehicle-as-a-service” solution (i.e., flexible vehicle usage offering)?

Sample size: n= 1,006

India



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