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2024 Deloitte Global Automotive Consumer Study

Key Findings: EMEA Focus Countries

February 2024

For more than a decade, Deloitte has been exploring automotive consumer trends impacting a rapidly evolving global mobility ecosystem.

Key insights from the Deloitte Global Automotive Consumer Study over the years:

- **2010** Overall value ranked as the primary factor when evaluating brands
- **2011** "Cockpit technology" and the shopping experience-led differentiators
- **2012** Interest in hybrids driven by cost and convenience, while interest in connectivity centers on safety
- **2014** Shared mobility emerges as an alternative to owning a vehicle
- **2017** Interest in full autonomy grows, but consumers want a track record of safety
- **2018** Consumers in many global markets continue to move away from internal combustion engines (ICE)
- **2019** Consumers "pump the brakes" on interest in autonomous vehicles
- **2020** Questions remain regarding consumers' willingness to pay for advanced technologies
- **2021** Online sales gaining traction, but majority of consumers still want in-person purchase experience
- **2022** Interest in electrified vehicles (EVs) grows, but worries about price, driving range, and charging time remain
- **2023** The shift to EVs is primarily based on a strong consumer perception that it will significantly reduce vehicle operating costs

The Deloitte Global Automotive Consumer Study informs Deloitte's point of view on the evolution of mobility, smart cities, connectivity, sustainability, and other matters surrounding the movement of people and goods.

Contents

Key findings

1 Is slowing EV momentum putting current regulatory timelines in jeopardy?

High interest rates and elevated sticker prices may be causing consumer interest in EVs to soften in most markets. Despite Original Equipment Manufacturers (OEMs) price cuts and government incentives designed to make them more affordable, a variety of other challenges continue to stand in the way, including range anxiety, charging time, and availability of charging infrastructure.

2 A significant number of consumers may be thinking about switching vehicle brands

Price tops the list of factors driving the choice of vehicle brand for consumers in Austria, Belgium, France, Germany, Italy, and the UK while product quality is top-of-mind in other EMEA markets such as Poland, Saudi Arabia, South Africa, Spain, and Turkey.

3 Interest in connectivity features may not fully translate into revenue and profit

There is a relatively high level of consumer interest in features that provide updates on vehicle maintenance, road safety, and traffic congestion. However, the willingness to pay extra for connected technologies remains comparatively low in most EMEA markets, except Saudi Arabia, South Africa, and Turkey.

4 A significant number of younger consumers may be interested in giving up vehicle ownership for a subscription, but lingering concerns remain

Due to the backdrop of uncertain economic conditions causing concern for financial capacity, younger consumers in many EMEA markets may be interested in giving up vehicle ownership altogether in favor of a subscription model. However, concerns about vehicle availability and total ownership cost persist.

1 Vehicle electrification

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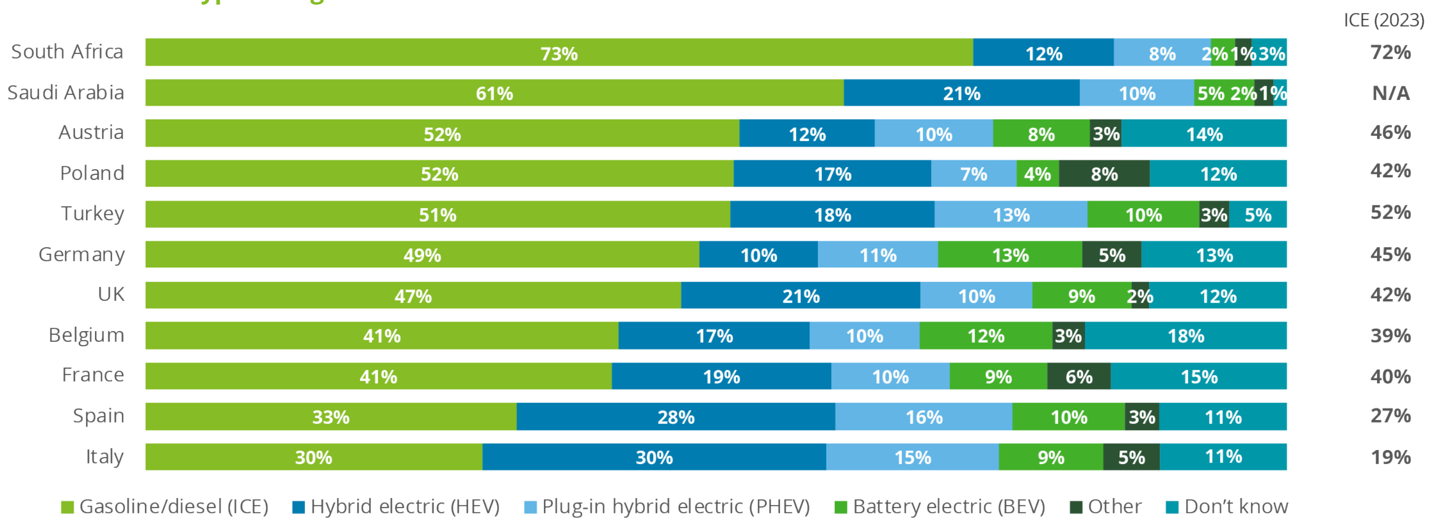
Consumer interest in ICE vehicles is rebounding in most markets surveyed as affordability concerns continue to weigh heavily on forward intentions.

Preference for type of engine in next vehicle



Note: Other includes vehicles with engine types such as compressed natural gas, ethanol, and hydrogen fuel cells; 2023 study not fielded in Saudi Arabia
Q32. What type of engine would you prefer in your next vehicle?
Sample size: n= 897 [Austria]; 885 [Belgium]; 849 [France]; 1,273 [Germany]; 915 [Italy]; 931 [Poland]; 948 [Saudi Arabia]; 957 [South Africa]; 882 [Spain]; 962 [Turkey]; 1,363 [UK]

In most markets surveyed, the main reason consumers intend to acquire an electrified vehicle stems from a strong desire to lower their operating (i.e., fuel) costs – outstripping concern for global climate change.

Top reasons to choose an EV as next vehicle

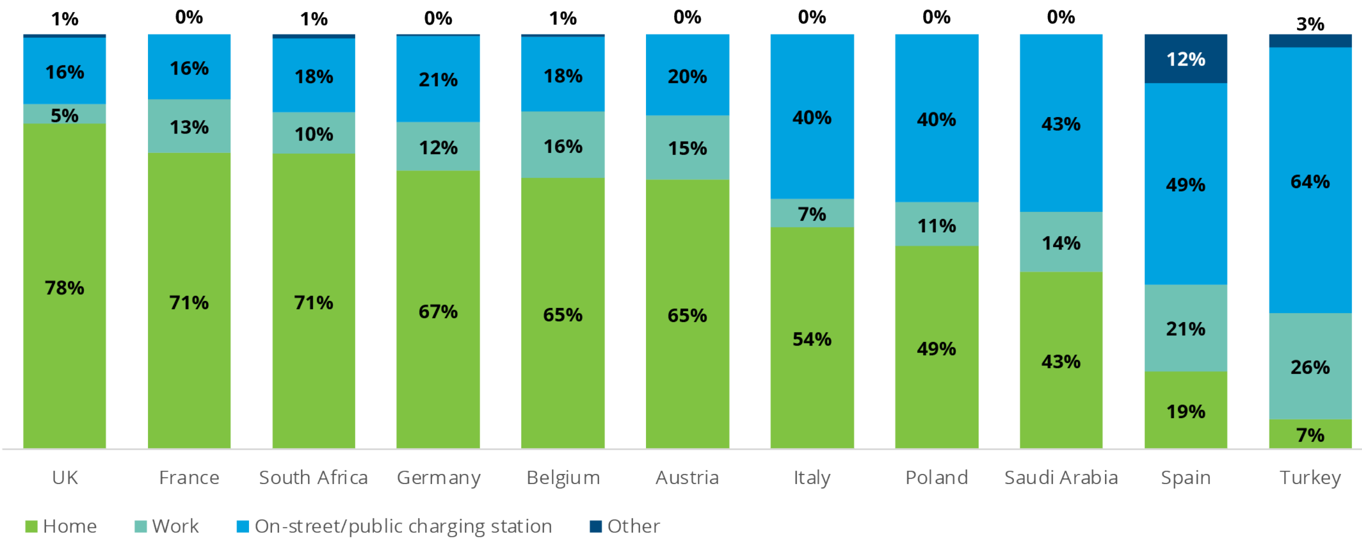
Factors	Austria	Belgium	France	Germany	Italy	Poland	Saudi Arabia	South Africa	Spain	Turkey	UK
Concern for the environment	44%	44%	42%	45%	**51%**	51%	54%	67%	49%	52%	51%
Concern about personal health	17%	17%	19%	18%	26%	25%	39%	44%	22%	30%	17%
Lower fuel costs	**47%**	**49%**	**58%**	**50%**	45%	**60%**	**55%**	**75%**	**55%**	**69%**	**57%**
Less maintenance	27%	28%	35%	27%	22%	21%	42%	43%	29%	33%	26%
Ability to use the vehicle as a backup battery/power source	21%	13%	10%	17%	15%	11%	37%	34%	15%	22%	14%
Peer pressure	4%	4%	2%	6%	8%	8%	11%	2%	4%	8%	4%
Driving experience	29%	25%	31%	29%	24%	44%	49%	49%	31%	46%	31%
Government incentives/ subsidies/stimulus programs	33%	24%	32%	30%	36%	26%	27%	10%	32%	27%	21%
Potential for extra taxeslevies applied to internal combustion vehicles	21%	30%	15%	21%	16%	23%	28%	22%	27%	18%	22%
Potential ban on sale of new internal combustion vehicles	23%	26%	22%	24%	21%	31%	21%	15%	37%	23%	31%
Other	3%	3%	1%	2%	1%	0%	1%	0%	1%	0%	2%

Top reasons

Q34. Which of the following factors have had the greatest impact on your decision to acquire an electrified vehicle? (Please select all that apply.)
Sample size: n = 275 [Austria]; 336 [Belgium]; 324 [France]; 427 [Germany]; 498 [Italy]; 265 [Poland]; 341 [Saudi Arabia]; 220 [South Africa]; 470 [Spain]; 395 [Turkey]; 537 [UK]

Building public charging capacity could help address consumer concerns over range anxiety, but the reality of day-to-day usage means people in most EMEA markets will likely rely on charging their EVs at home.

Expecting to charge electrified vehicle most often at…



Q35. Where do you expect to charge your electrified vehicle most often?
Sample size: n= 169 [Austria]; 188 [Belgium]; 161 [France]; 295 [Germany]; 222 [Italy]; 104 [Poland]; 145 [Saudi Arabia]; 101 [South Africa]; 224 [Spain]; 223 [Turkey]; 251 [UK]

Even though consumers want to maximize their convenience by having a public EV charger readily available whenever they need it, more strategic oversight could maximize the investments being made in public charging networks across markets in the EMEA region.

Public locations that the consumers would prefer to charge their EV when they are away from their home

Public places	Austria	Belgium	France	Germany	Italy	Poland	Saudi Arabia	South Africa	Spain	Turkey	UK
Any location as long as I can find a charger when I need it	**39%**	**43%**	**42%**	**31%**	**41%**	**36%**	20%	**34%**	**30%**	**37%**	**40%**
Dedicated EV charging station equipped with amenities	18%	10%	12%	23%	10%	17%	**37%**	20%	14%	8%	20%
Traditional gas station with EV chargers	16%	13%	18%	16%	17%	11%	17%	25%	26%	20%	11%
Vehicle dealership	1%	2%	5%	2%	3%	4%	5%	2%	2%	9%	1%
Retail outlet/mall	6%	4%	8%	5%	10%	8%	2%	3%	4%	4%	10%
Parking lot (e.g., metro stations, airports, public lots/garages)	8%	6%	4%	9%	8%	8%	8%	15%	11%	12%	8%
On-street parking	8%	15%	7%	11%	9%	9%	6%	2%	9%	7%	6%
Community/public building	2%	5%	2%	2%	2%	9%	3%	0%	3%	1%	3%
Hotel or peer-to-peer rental	1%	3%	2%	0%	0%	0%	3%	0%	0%	1%	0%
Other	2%	0%	0%	1%	0%	0%	0%	0%	1%	0%	1%

Most preferred by consumers

Note: Percentages may not add to 100 due to rounding.
Q37. Where would you most want to charge your EV when you are away from home (i.e., public charging location)?
Sample size: n= 169 [Austria]; 188 [Belgium]; 161 [France]; 295 [Germany]; 222 [Italy]; 104 [Poland]; 145 [Saudi Arabia]; 101 [South Africa]; 224 [Spain]; 223 [Turkey]; 251 [UK]

When it comes to paying for public EV charging, consumers in all EMEA markets surveyed generally prefer using their existing credit/debit cards, signaling an opportunity to simplify the charging experience using familiar payment methods.

Most preferred way to pay for public EV charging

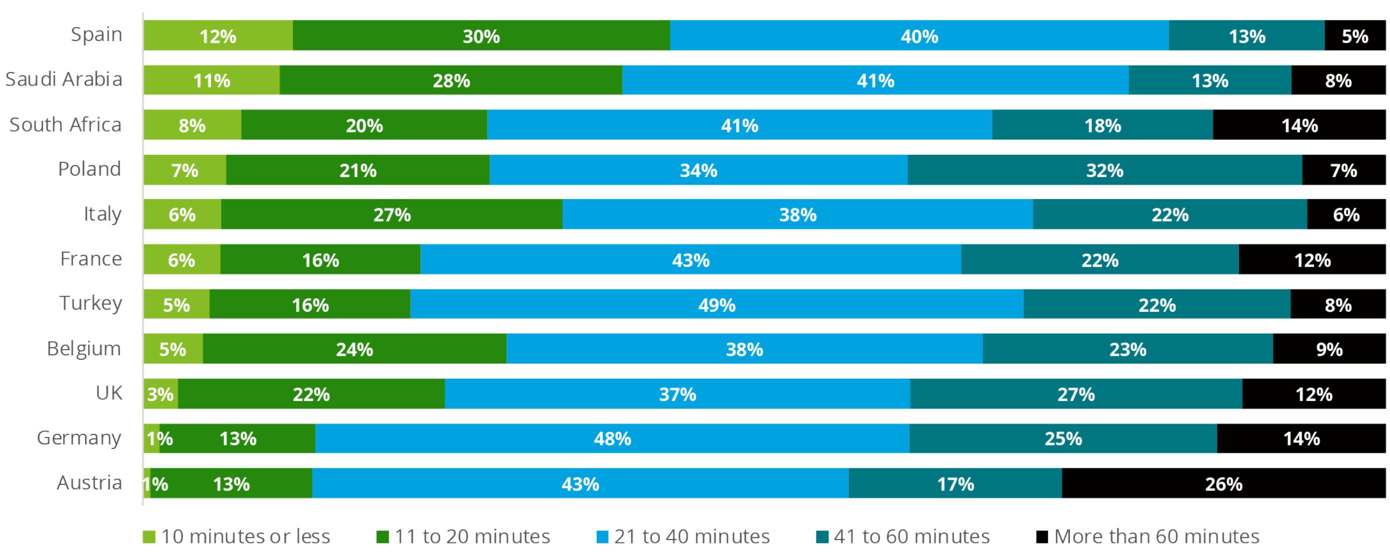
Payment method	Austria	Belgium	France	Germany	Italy	Poland	Saudi Arabia	South Africa	Spain	Turkey	UK
Credit/debit card	**56%**	**51%**	**55%**	**44%**	**52%**	**42%**	**48%**	**51%**	**55%**	**67%**	**66%**
Charging network app on your smartphone	24%	23%	18%	33%	20%	40%	26%	21%	21%	20%	22%
Pre-paid subscription plan	5%	14%	16%	10%	14%	6%	16%	19%	9%	7%	4%
Loyalty points	7%	6%	6%	6%	7%	4%	8%	8%	10%	4%	4%
Third-party payment platform	5%	5%	4%	6%	6%	7%	3%	0%	3%	1%	2%
Other	3%	1%	0%	1%	0%	1%	0%	1%	1%	0%	2%

Most preferred mode of payment

Note: Percentages may not add to 100 due to rounding.
Q40. How would you most prefer to pay for public EV charging?
Sample size: n= 169 [Austria]; 188 [Belgium]; 161 [France]; 295 [Germany]; 222 [Italy]; 104 [Poland]; 145 [Saudi Arabia]; 101 [South Africa]; 224 [Spain]; 223 [Turkey]; 251 [UK]

The assumption that EV charge times need to be on par with fossil fuel fill-ups may be somewhat overstated as surveyed consumers in most markets are willing to wait longer than 10 minutes to refuel. However, EV "refueling" time often involves more than just plug-in time.

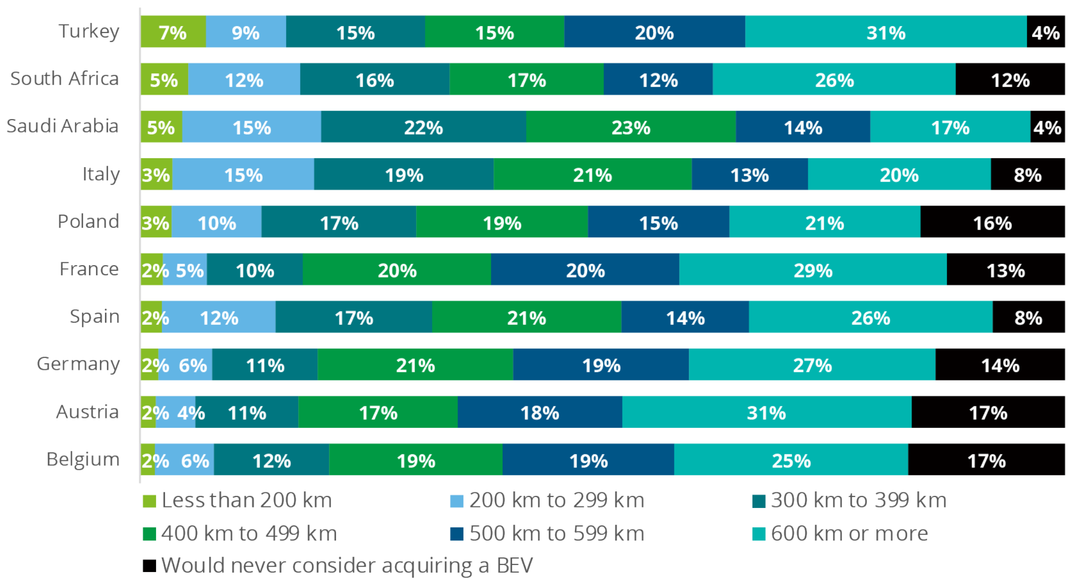
Expected wait time to charge an EV at public charging stations from empty to 80%



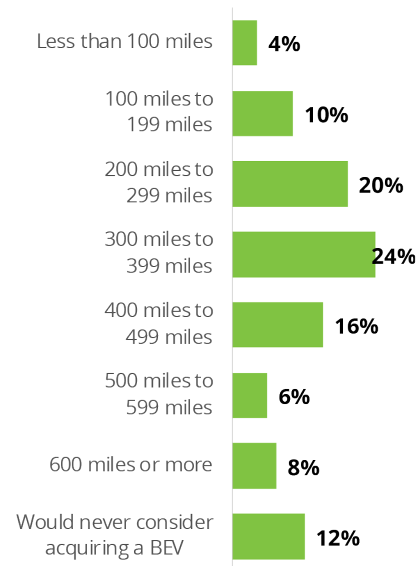
Q38. How long do you expect it to take to charge your EV from empty to 80% at a public charging location?
Sample size: n= 169 [Austria]; 188 [Belgium]; 161 [France]; 295 [Germany]; 222 [Italy]; 104 [Poland]; 145 [Saudi Arabia]; 101 [South Africa]; 224 [Spain]; 223 [Turkey]; 251 [UK]

A significant number of non-BEV intenders across most EMEA markets would expect a fully charged BEV to have a driving range of at least 400 km in order to consider one as a viable option for their next vehicle.

Consumer expectations on BEV driving range



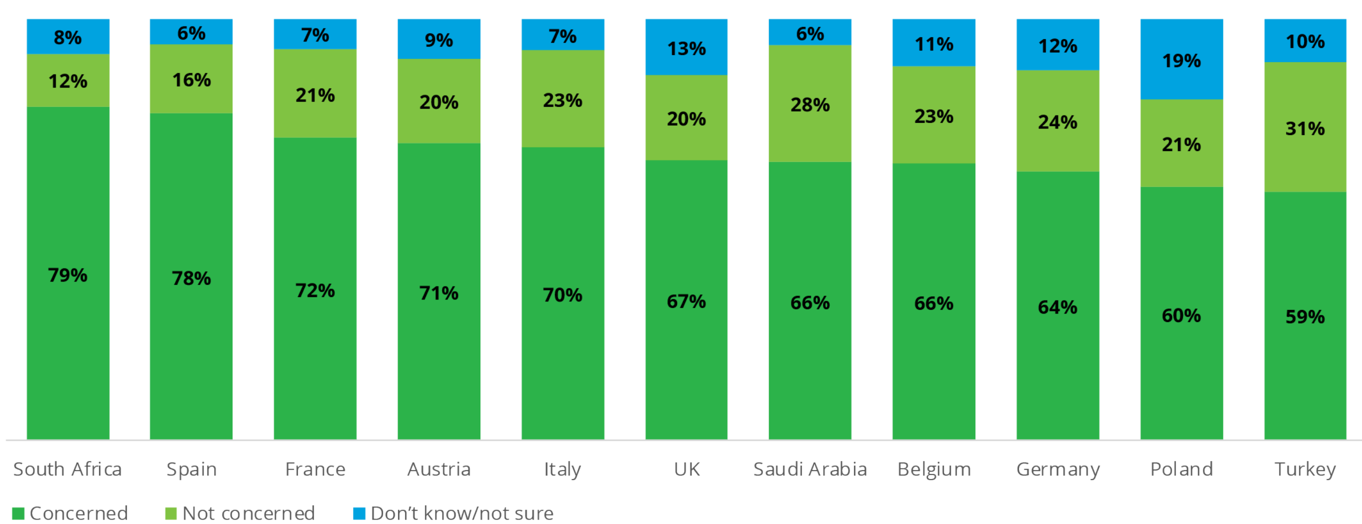
Consumer expectations on BEV driving range in the UK



Q44. How far would a fully charged all-battery electric vehicle need to go in order for you to consider acquiring one?
Sample size: n= 821 [Austria]; 782 [Belgium]; 776 [France]; 1,112 [Germany]; 831 [Italy]; 896 [Poland]; 898 [Saudi Arabia]; 937 [South Africa]; 795 [Spain]; 868 [Turkey]; 1,245 [UK]

A majority of consumers are concerned about the "cradle-to-grave" environmental impact of an EV battery, emphasizing the need for clearly defined sustainability strategies across the EV manufacturing value chain.

Percentage of consumers concerned about the end-to-end environmental impact of an EV battery



Not concerned % include not at all concerned or not very concerned; Concerned % include somewhat concerned or very concerned
Q46. To what extent are you concerned about the end-to-end environmental impact of an EV battery (e.g., mineral mining, manufacturing, source of electricity during multiple lifecycles, end-of-life recycling)?
Sample size: n= 897 [Austria]; 885 [Belgium]; 849 [France]; 1,273 [Germany]; 915 [Italy]; 931 [Poland]; 948 [Saudi Arabia]; 957 [South Africa]; 882 [Spain]; 962 [Turkey]; 1,363 [UK]

When it comes to BEVs, surveyed consumers across EMEA markets are generally most concerned about driving range, cost, and the time it takes to charge.

Greatest concern regarding all battery-powered electric vehicles

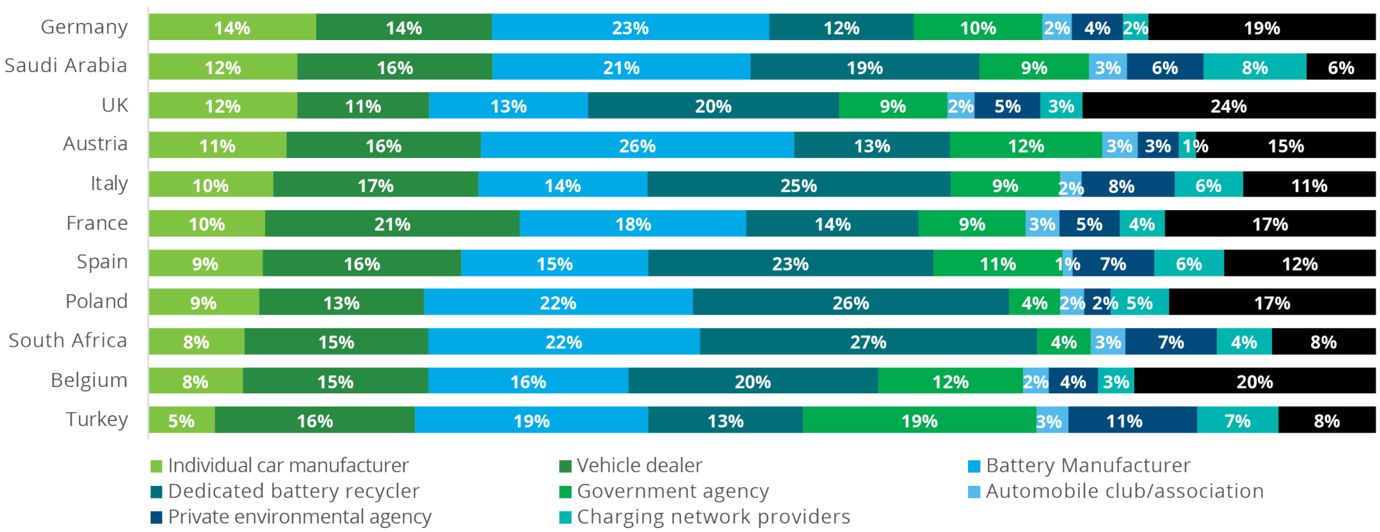
Concern	Austria	Belgium	France	Germany	Italy	Poland	Saudi Arabia	South Africa	Spain	Turkey	UK
Driving range	**56%**	49%	46%	**55%**	**45%**	**52%**	24%	36%	44%	**41%**	**53%**
Cost/price premium	47%	**58%**	**53%**	42%	29%	40%	29%	42%	46%	31%	51%
Cold weather performance	42%	30%	25%	33%	21%	31%	26%	32%	19%	26%	31%
Increased need to plan my trips	27%	25%	21%	21%	23%	17%	21%	25%	29%	15%	33%
Uncertain resale value	24%	16%	17%	21%	13%	17%	20%	25%	11%	17%	23%
Potential for extra taxes/levies associated with all-BEVs	10%	22%	16%	10%	13%	13%	20%	20%	13%	20%	15%
Time required to charge	46%	45%	45%	40%	40%	44%	**37%**	45%	**47%**	**41%**	48%
Ongoing charging and running costs	27%	31%	28%	27%	24%	33%	27%	31%	28%	24%	33%
Cost to eventually replace the battery	42%	39%	39%	38%	38%	39%	34%	39%	40%	34%	42%
Lack of knowledge or understanding about EVs/EV technology	19%	17%	13%	15%	17%	17%	30%	33%	19%	13%	22%
Lack of public electric vehicle charging infrastructure	37%	38%	31%	37%	34%	35%	34%	**50%**	38%	37%	46%
Lack of charger at home	44%	35%	29%	41%	30%	36%	29%	41%	33%	34%	41%
Lack of alternate power source at home	31%	20%	19%	22%	15%	21%	25%	35%	19%	23%	18%
Safety concerns with battery technology	31%	28%	18%	32%	30%	29%	30%	32%	23%	28%	26%
End-to-end sustainability	34%	18%	25%	23%	16%	14%	20%	22%	18%	15%	22%
Lack of choice regarding brands/models	10%	11%	11%	10%	10%	11%	16%	20%	13%	14%	14%
Other	2%	1%	1%	1%	1%	1%	0%	1%	0%	0%	1%

Most commonly cited

Note: Sum of the percentages exceed 100% as respondents can select multiple options.
Q43. What are your biggest concerns regarding all-battery-powered electric vehicles? Please select all that apply.
Sample size: n= 897 [Austria]; 885 [Belgium]; 849 [France]; 1,273 [Germany]; 915 [Italy]; 931 [Poland]; 948 [Saudi Arabia]; 957 [South Africa]; 882 [Spain]; 962 [Turkey]; 1,363 [UK]

A variety of stakeholders need to work together to develop a robust ecosystem for battery recycling as an emerging facet of the EV value chain before a critical mass of end-of-life batteries appears on the horizon.

Entity responsible for collecting, storing, and recycling EV batteries after their useful lives

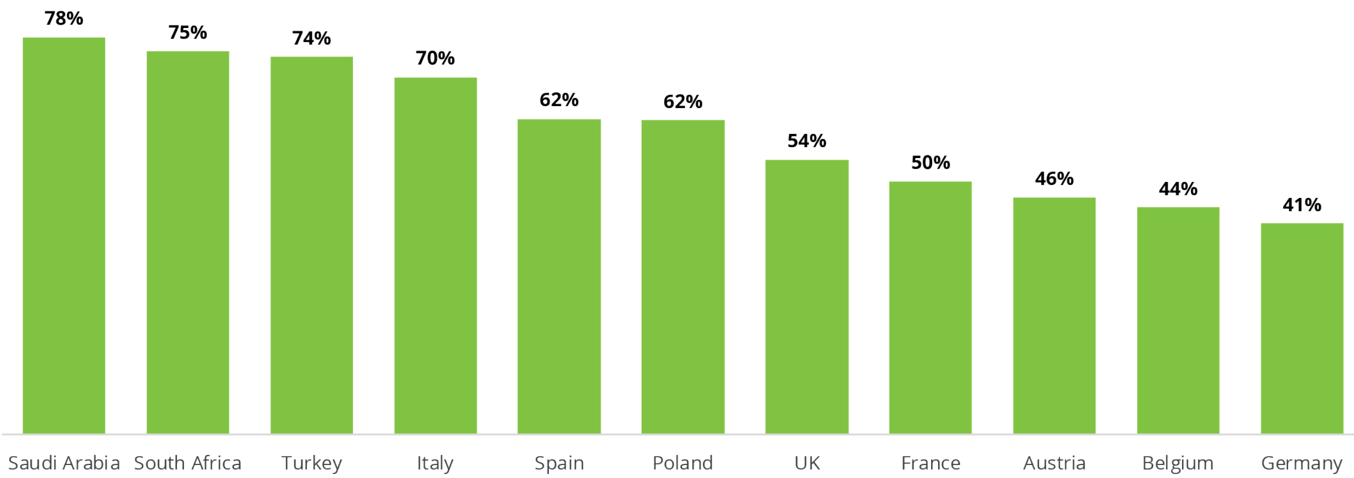


*includes don't know or don't care.
Q47. Who do you think should be responsible for collecting, storing, and recycling electric vehicle batteries after their useful lives?
Sample size: n= 897 [Austria]; 885 [Belgium]; 849 [France]; 1,273 [Germany]; 915 [Italy]; 931 [Poland]; 948 [Saudi Arabia]; 957 [South Africa]; 882 [Spain]; 962 [Turkey]; 1,363 [UK]

2 Future vehicle intentions

A significant number of consumers surveyed across EMEA markets intend to choose a alternative brand of vehicle over the one they currently drive the next time they are in-the-market to buy a vehicle.

Percentage of consumers switching to another brand* of vehicle



*includes switching to a different brand from the same parent or a different brand from a different sales parent
Q5. What brand is the vehicle you drive most often?
Sample size: n= 790 [Austria]; 846 [Belgium]; 811 [France]; 1,135 [Germany]; 631 [Italy]; 741 [Poland]; 913 [Saudi Arabia]; 775 [South Africa]; 837 [Spain]; 784 [Turkey]; 1,141 [UK]

For most consumers, the intention to switch vehicle brands comes down to a desire to try something new or gain access to new features. However, affordability concerns are also among the top reasons to make a change in some markets as consumers continue to experience macroeconomic pressures.

Most important reasons for switching to another brand of vehicle

Important reasons for switching to another brand	Austria	Belgium	France	Germany	Italy	Poland	Saudi Arabia	South Africa	Spain	Turkey	UK
Lack of readily available vehicle	4%	5%	6%	6%	4%	6%	14%	2%	4%	5%	4%
New brand has technology/ features I want	21%	22%	23%	25%	34%	28%	**42%**	44%	33%	43%	20%
Poor customer experience with the current brand	3%	6%	7%	6%	4%	3%	8%	3%	6%	6%	4%
Cost/affordability	24%	28%	31%	26%	24%	20%	26%	28%	20%	16%	26%
Incentives offered by the intended brand	16%	6%	9%	13%	15%	14%	24%	8%	7%	17%	7%
Upgrading to a premium brand	9%	12%	10%	12%	10%	10%	32%	22%	9%	32%	15%
I just want to try something different	**41%**	**40%**	**40%**	**38%**	**38%**	**52%**	40%	**54%**	**45%**	**45%**	**45%**
Cost of servicing the current brand is too high	8%	5%	9%	9%	7%	9%	18%	11%	9%	9%	8%
Current brand lacks "greener" vehicle models that I want	4%	8%	9%	10%	10%	9%	17%	6%	10%	11%	8%
Other	12%	10%	4%	7%	6%	7%	1%	4%	7%	1%	12%

■ Top reasons

Note: Sum of the percentages exceed 100% as respondents can select multiple options.
Q18. Why are you considering a switch to another vehicle brand? Please select all that apply.
Sample size: n= 367 [Austria]; 376 [Belgium]; 402 [France]; 469 [Germany]; 441 [Italy]; 456 [Poland]; 709 [Saudi Arabia]; 581 [South Africa]; 517 [Spain]; 579 [Turkey]; 613 [UK]

Depending on the market, what matters most to consumers as they think about their next vehicle brand is either price, product quality, performance, or vehicle features.

Most important factors driving the choice of brand for next vehicle

Drivers of brand choice	Austria	Belgium	France	Germany	Italy	Poland	Saudi Arabia	South Africa	Spain	Turkey	UK
Previous sales experience	28%	20%	13%	27%	12%	14%	18%	9%	9%	11%	12%
Previous service experience	18%	22%	17%	18%	13%	18%	22%	17%	18%	18%	21%
Product quality	50%	50%	57%	47%	54%	**63%**	**55%**	**62%**	**58%**	**55%**	57%
Brand advertising	4%	4%	6%	6%	5%	6%	19%	14%	5%	13%	5%
Brand image	12%	16%	17%	15%	17%	23%	24%	31%	18%	28%	17%
Brand affiliations	4%	5%	5%	5%	6%	5%	16%	6%	3%	8%	5%
Brand familiarity	36%	28%	33%	39%	22%	39%	28%	32%	29%	30%	32%
Quality of overall ownership experience	31%	25%	15%	31%	20%	27%	30%	34%	23%	20%	30%
Vehicle features	41%	35%	40%	39%	48%	55%	49%	55%	48%	52%	44%
Availability of battery electric vehicles/hybrid options	13%	12%	12%	13%	21%	12%	23%	17%	17%	19%	17%
Vehicle performance	33%	33%	32%	30%	42%	41%	46%	61%	38%	45%	52%
Price	**60%**	**60%**	**58%**	**55%**	**56%**	59%	44%	50%	47%	36%	**63%**
Other	1%	2%	1%	2%	0%	1%	0%	1%	0%	0%	2%

Most commonly cited

Note: Sum of the percentages exceed 100% as respondents can select multiple options.
Q19. What are the most important factors driving the choice of brand for your next vehicle? Please select all that apply.
Sample size: n= 897 [Austria]; 885 [Belgium]; 849 [France]; 1,273 [Germany]; 915 [Italy]; 931 [Poland]; 948 [Saudi Arabia]; 957 [South Africa]; 882 [Spain]; 962 [Turkey]; 1,363 [UK]

It may be difficult to move to an entirely online purchase process in many markets as consumers say they need to physically interact with either the vehicle itself or real salespeople test drive a vehicle before their next purchase.

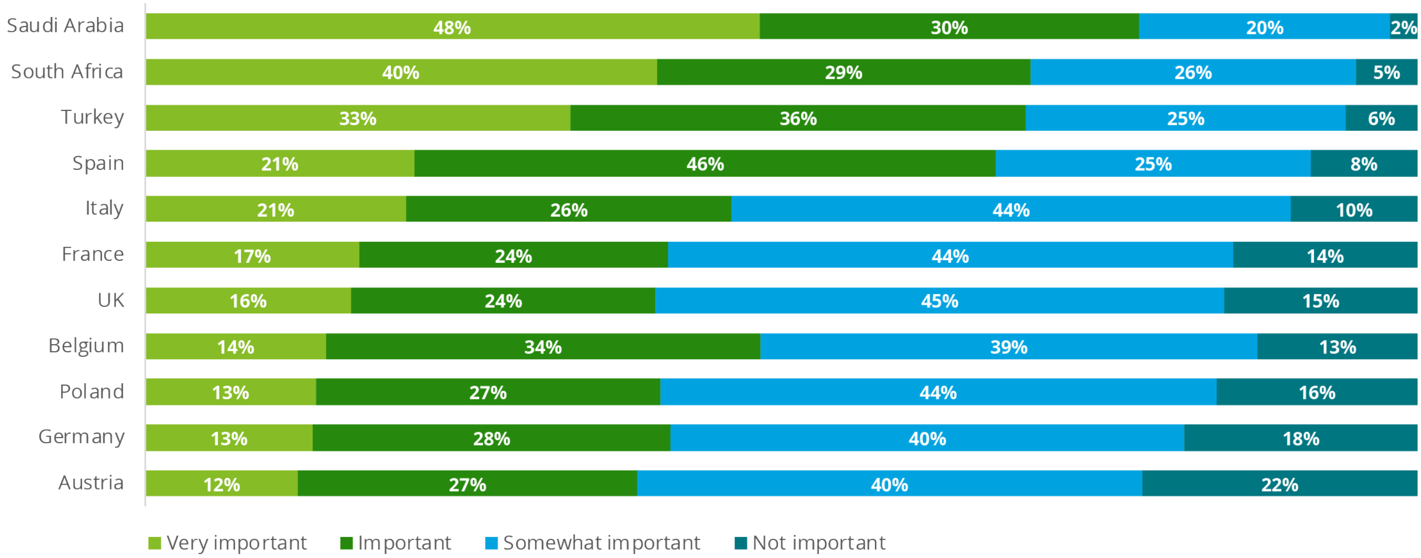
Level of agreement on various aspects of the purchase experience (% somewhat/strongly agree)

Aspect of vehicle purchase experience	Austria	Belgium	France	Germany	Italy	Poland	Saudi Arabia	South Africa	Spain	Turkey	UK
I want to interact with real people	**86%**	**81%**	**83%**	**80%**	**82%**	77%	**91%**	89%	**83%**	84%	80%
I want to negotiate in-person to get the best deal	79%	76%	79%	72%	81%	81%	90%	90%	80%	84%	75%
I need to physically interact with the vehicle before I buy it	**86%**	**81%**	80%	79%	79%	**86%**	90%	**93%**	82%	**85%**	81%
I have to test drive the vehicle to make sure it's right for me	85%	72%	80%	78%	69%	83%	**91%**	**93%**	80%	**85%**	**82%**
I prefer to limit the need to visit a dealership in person	27%	31%	41%	35%	34%	29%	73%	37%	33%	51%	36%
I want to build a relationship with a dealer for future service needs	54%	63%	68%	56%	71%	56%	85%	83%	60%	78%	51%

Q31. Thinking about the next time you acquire a vehicle, to what extent do you agree or disagree with the following statements?
Sample size: n= 897 [Austria]; 885 [Belgium]; 849 [France]; 1,273 [Germany]; 915 [Italy]; 931 [Poland]; 948 [Saudi Arabia]; 957 [South Africa]; 882 [Spain]; 962 [Turkey]; 1,363 [UK]

Consumer reaction to whether it's important for vehicle brands to have a strong commitment to sustainable manufacturing practices can be very different depending on the individual market.

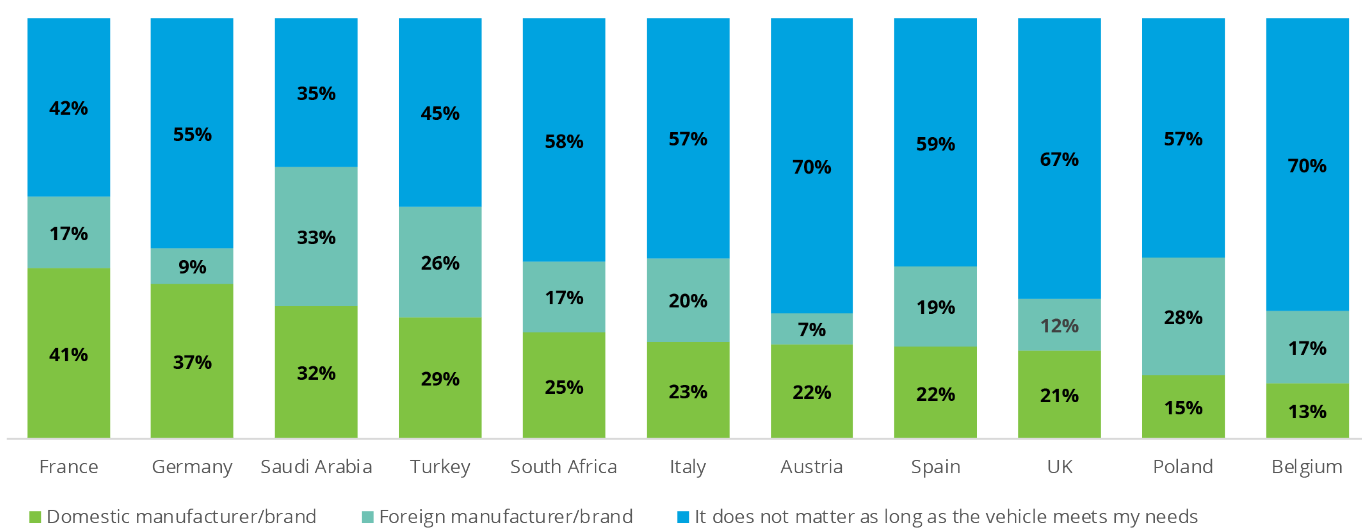
Importance of a vehicle brand committing to sustainable practices



Q20. When thinking about choosing your next vehicle, how important will it be for a vehicle brand to have a strong commitment to sustainable practices (e.g., low carbon manufacturing footprint, use of environmentally friendly materials, electrification strategy)?
Sample size: n= 897 [Austria]; 885 [Belgium]; 849 [France]; 1,273 [Germany]; 915 [Italy]; 931 [Poland]; 948 [Saudi Arabia]; 957 [South Africa]; 882 [Spain]; 962 [Turkey]; 1,363 [UK]

Brand affinity for homegrown automakers is relatively low in many EMEA markets, underscoring the competitive challenge some brands face in their home markets.

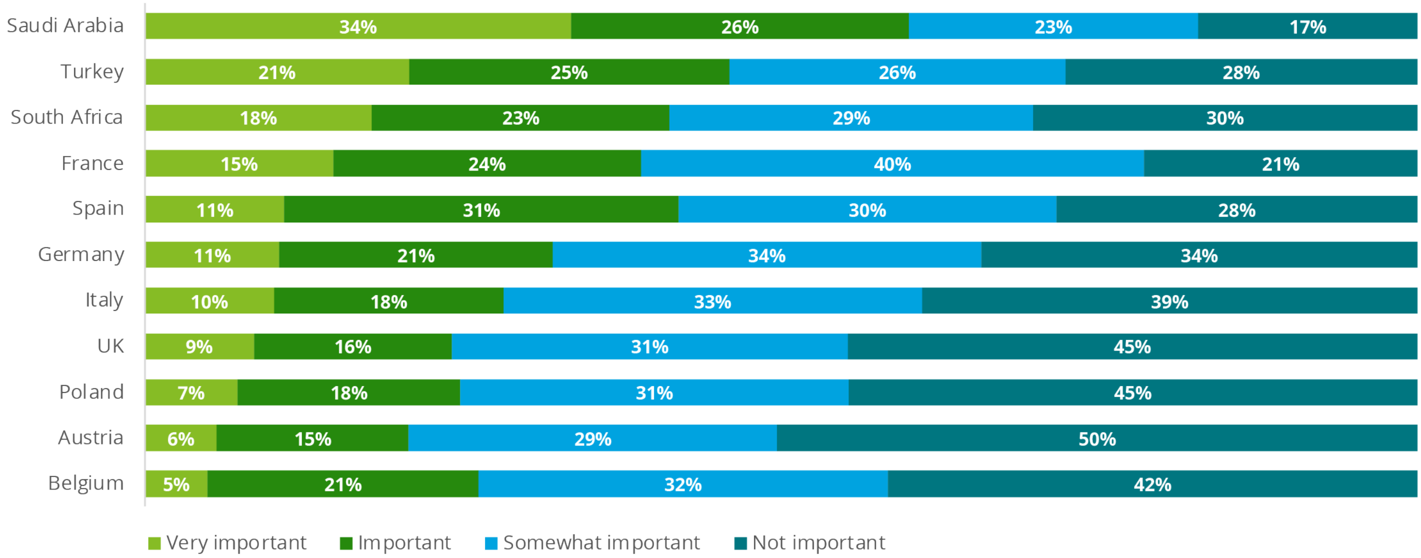
Preferred organizations for next vehicle purchase



Q45. From which of the following type of organizations are you most interested in acquiring your next vehicle?
Sample size: n= 897 [Austria]; 885 [Belgium]; 849 [France]; 1,273 [Germany]; 915 [Italy]; 931 [Poland]; 948 [Saudi Arabia]; 957 [South Africa]; 882 [Spain]; 962 [Turkey]; 1,363 [UK]

Consumers in the majority of EMEA markets place relatively low importance on where a vehicle is manufactured as a factor in the purchase decision process.

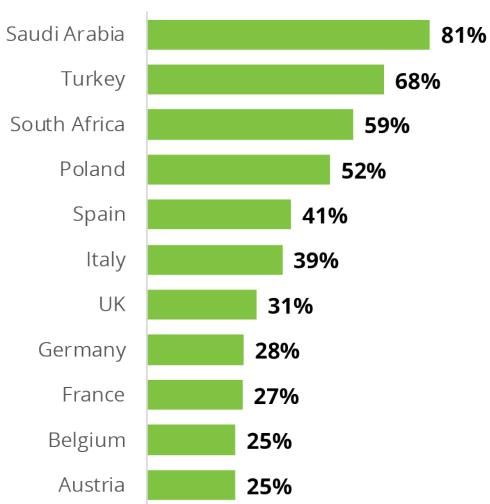
Importance of next vehicle to be manufactured locally



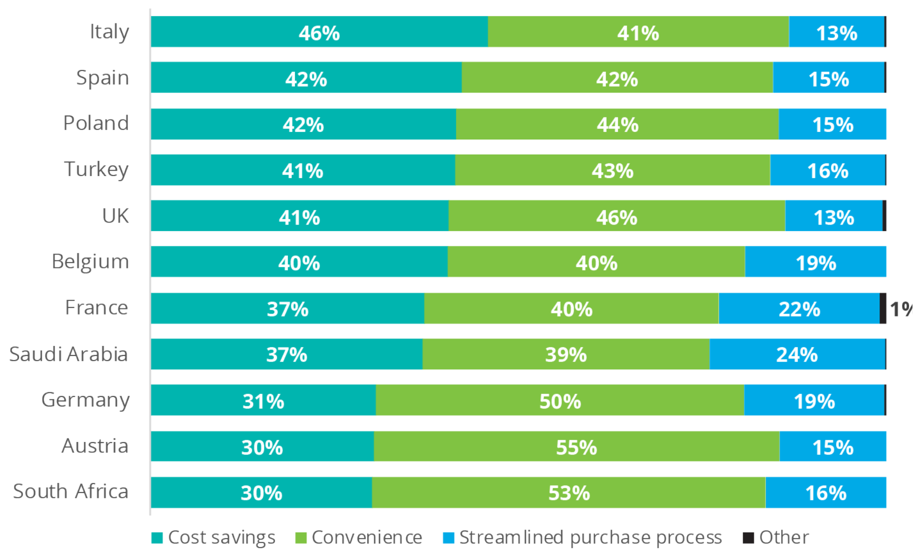
Q21. To what extent is it important that your next vehicle be locally manufactured (i.e., manufactured in your country or region)?
Sample size: n= 897 [Austria]; 885 [Belgium]; 849 [France]; 1,273 [Germany]; 915 [Italy]; 931 [Poland]; 948 [Saudi Arabia]; 957 [South Africa]; 882 [Spain]; 962 [Turkey]; 1,363 [UK]

As OEMs look at various potential profit pools going forward, surveyed consumers in several markets are signaling a significant level of interest in manufacturer branded insurance products based on the perception that it will be convenient and cost-effective.

Percentage of surveyed consumers who would be interested in purchasing insurance directly from the manufacturer



For those consumers who are interested in purchasing insurance directly from the manufacturer, primary benefits are...



Q52. The next time you acquire a vehicle, how interested would you be in purchasing insurance directly from the vehicle manufacturer?
Q53. What do you believe the primary benefit of buying insurance directly from the manufacturer to be?
Sample size: n for Q52 = 897 [Austria]; 885 [Belgium]; 849 [France]; 1,273 [Germany]; 915 [Italy]; 931 [Poland]; 948 [Saudi Arabia]; 957 [South Africa]; 882 [Spain]; 962 [Turkey]; 1,363 [UK];
n for Q53 = 227 [Austria]; 225 [Belgium]; 233 [France]; 352 [Germany]; 355 [Italy]; 488 [Poland]; 769 [Saudi Arabia]; 566 [South Africa]; 364[Spain]; 654 [Turkey]; 429 [UK]

3 Connectivity

Surveyed consumers are interested in connected vehicle features that improve road safety, suggest less congested routes, and provide maintenance updates even if it means sharing their PII* with manufacturers or other third parties.

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

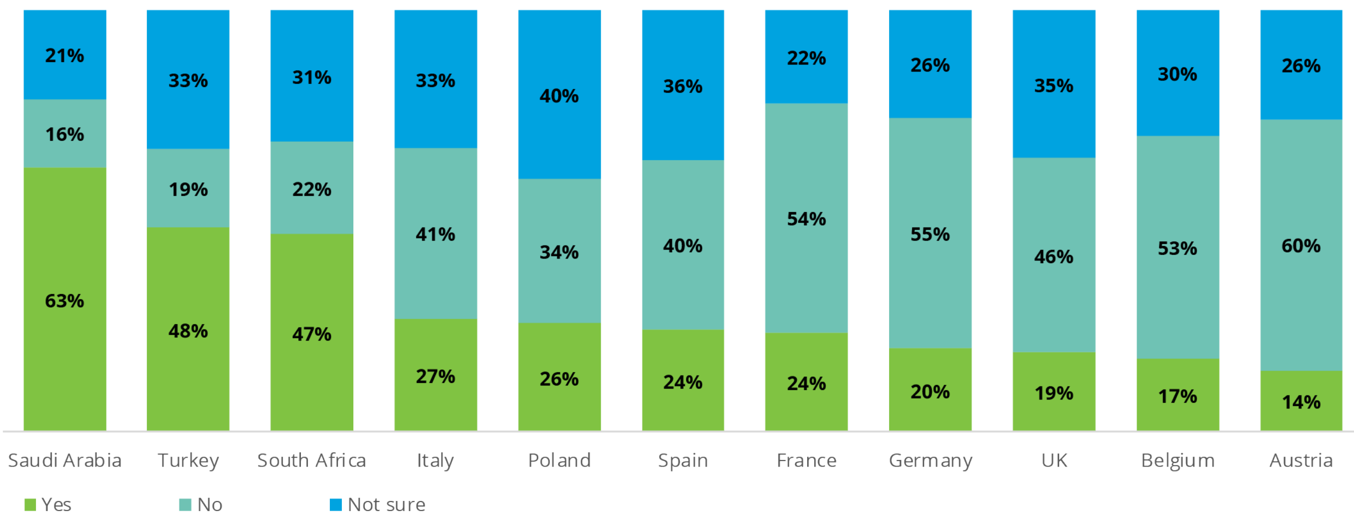
Connected vehicle features	Austria	Belgium	France	Germany	Italy	Poland	Saudi Arabia	South Africa	Spain	Turkey	UK
Updates regarding traffic congestion and suggested alternate routes	54%	**62%**	58%	**56%**	63%	61%	85%	79%	62%	79%	**62%**
Suggestions regarding safer routes (i.e., avoid unpaved roads)	40%	49%	50%	46%	60%	58%	84%	80%	61%	79%	51%
Updates to improve road safety and prevent potential collisions	51%	60%	62%	52%	**68%**	**63%**	87%	**84%**	**66%**	**82%**	56%
Customized/optimized vehicle insurance plan (e.g., "pay how you drive" plans)	40%	45%	46%	41%	56%	54%	81%	70%	53%	74%	39%
Maintenance updates and vehicle health reporting / alerts	**57%**	59%	**63%**	54%	67%	**63%**	**89%**	83%	65%	80%	59%
Maintenance cost forecasts based on your driving habits	46%	53%	57%	48%	60%	57%	83%	77%	59%	78%	51%
Customized suggestions regarding ways to minimize service expenses	45%	53%	53%	44%	61%	54%	82%	79%	58%	76%	49%
Over-the-air vehicle software updates that correct operational faults or improve your driving experience	42%	50%	57%	46%	62%	58%	84%	72%	58%	75%	50%
Access to nearby parking (i.e., availability, booking, and payment)	44%	45%	44%	49%	55%	55%	82%	67%	56%	74%	50%

■ Most commonly cited

Note: Sum of the percentages exceed 100% as respondents can select multiple options; * personally identifiable information.
Q49. How interested are you in the following benefits of a connected vehicle if it meant sharing your own personally identifying data and/or vehicle/operational data with the manufacturer or a third party?
Sample size: n= 897 [Austria]; 885 [Belgium]; 849 [France]; 1,273 [Germany]; 915 [Italy]; 931 [Poland]; 948 [Saudi Arabia]; 957 [South Africa]; 882 [Spain]; 962 [Turkey]; 1,363 [UK]

Consumer willingness to pay for connected features is quite low in most EMEA markets, representing a clear challenge for OEMs trying to monetize additional aspects of the mobility experience.

Willingness to pay extra for connectivity features



Q50. Are you willing to pay extra for these features (i.e., paying a monthly subscription)?
Sample size: n= 897 [Austria]; 885 [Belgium]; 849 [France]; 1,273 [Germany]; 915 [Italy]; 931 [Poland]; 948 [Saudi Arabia]; 957 [South Africa]; 882 [Spain]; 962 [Turkey]; 1,363 [UK]

In most EMEA markets, a significant number of consumers do not trust anyone to manage their connected vehicle data, signaling a key for OEMs looking to develop digital services.

Most trusted entity for managing connected vehicle data

Most trusted entity	Austria	Belgium	France	Germany	Italy	Poland	Saudi Arabia	South Africa	Spain	Turkey	UK
Car manufacturer	16%	17%	16%	20%	**21%**	21%	**28%**	24%	19%	**29%**	21%
Vehicle dealer	14%	24%	24%	12%	18%	12%	17%	17%	**20%**	16%	12%
Financial service provider	2%	2%	3%	3%	4%	5%	4%	7%	4%	4%	4%
Insurance company	8%	14%	14%	10%	18%	19%	17%	**27%**	12%	10%	14%
Automobile club or association	17%	2%	2%	7%	5%	2%	5%	4%	4%	2%	4%
Cellular service provider	2%	4%	3%	3%	5%	5%	4%	3%	5%	9%	3%
Cloud service provider	4%	2%	3%	3%	5%	5%	4%	6%	5%	6%	3%
Government agency	8%	6%	5%	9%	8%	4%	15%	2%	10%	19%	8%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
None of the above	**29%**	**29%**	**29%**	**32%**	16%	**26%**	4%	10%	19%	7%	**30%**

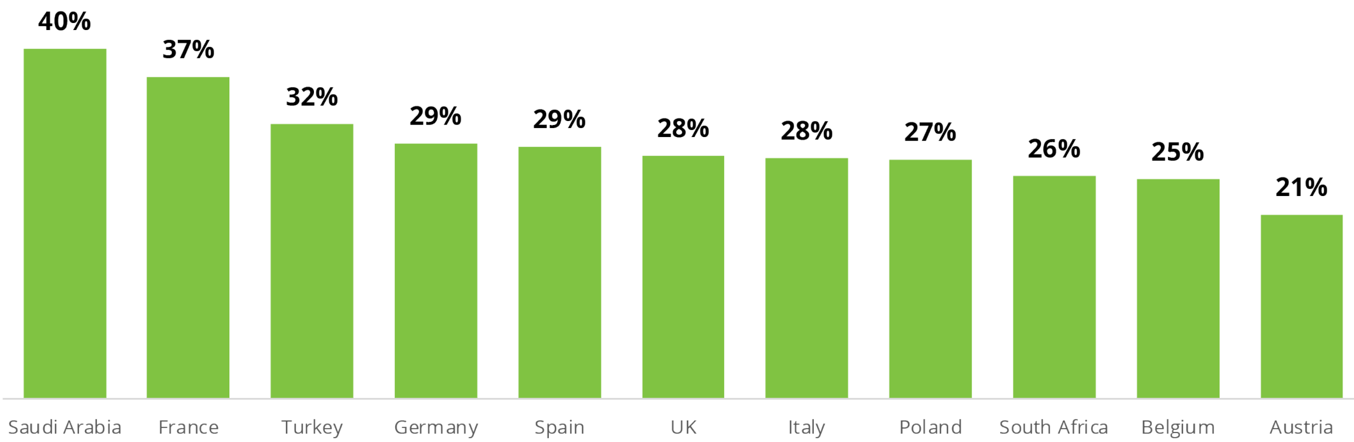
Most commonly cited

Q51. In a scenario where you owned a connected vehicle, who would you trust most with access to the data your vehicle generates?
Sample size: n= 897 [Austria]; 885 [Belgium]; 849 [France]; 1,273 [Germany]; 915 [Italy]; 931 [Poland]; 948 [Saudi Arabia]; 957 [South Africa]; 882 [Spain]; 962 [Turkey]; 1,363 [UK]

4 Vehicle subscriptions

A backdrop of uncertain economic conditions appears to be causing concern regarding financial capacity among younger consumers in many EMEA markets. As a result, some of them may be interested in giving up vehicle ownership altogether in favor of a subscription model.

Interest in giving up vehicle ownership in favor of vehicle subscription (% very/somewhat interested) – 18- to 34-year-old respondents



Q63. To what extent are you interested in giving up vehicle ownership in favor of subscribing to the use of a vehicle going forward?
Sample size: n= 246 [Austria]; 262 [Belgium]; 241 [France]; 348 [Germany]; 206 [Italy]; 266 [Poland]; 368 [Saudi Arabia]; 418 [South Africa]; 221 [Spain]; 365 [Turkey]; 380 [UK]

For consumers interested in vehicle subscription services, convenience, a predictable cost structure, and flexibility are among the most important characteristics.

Important characteristics of a vehicle subscription

Characteristics of vehicle subscription	Austria	Belgium	France	Germany	Italy	Poland	Saudi Arabia	South Africa	Spain	Turkey	UK
Convenience	48%	**42%**	**33%**	38%	**40%**	**38%**	34%	43%	**42%**	**38%**	**43%**
Increased flexibility	42%	32%	26%	30%	27%	34%	33%	37%	35%	25%	34%
Possibility to exchange vehicles	25%	22%	28%	27%	33%	35%	28%	37%	24%	33%	20%
Possibility to subscribe to a vehicle segment instead of a specific model	19%	17%	14%	20%	21%	22%	32%	26%	17%	28%	17%
Possibility to subscribe to a specific model instead of a vehicle segment	20%	20%	18%	19%	15%	19%	25%	27%	16%	24%	17%
Availability of vehicles	42%	36%	30%	33%	28%	**38%**	31%	46%	35%	31%	40%
Home delivery services	31%	25%	25%	27%	20%	29%	34%	**48%**	30%	31%	27%
Hassle-free online contract closing/full digital customer experience	33%	23%	26%	28%	19%	25%	29%	30%	20%	26%	23%
Full cost control due to transparent and predictable fixed monthly fees	**54%**	**42%**	**33%**	**42%**	34%	**38%**	**36%**	47%	32%	34%	39%
Availability of complementary premium services	15%	14%	17%	16%	18%	15%	33%	28%	22%	22%	13%
Premium vehicles/brands offered	16%	17%	19%	14%	19%	18%	29%	31%	21%	20%	17%
Selection of only brand-new vehicles	16%	16%	16%	13%	15%	15%	26%	23%	12%	25%	12%
Selection of brand new as well as certified pre-owned vehicles	23%	26%	20%	19%	20%	27%	28%	37%	22%	29%	22%
Possibility to test new vehicles for a certain period without additional costs	36%	21%	28%	24%	23%	29%	26%	33%	30%	30%	19%

Top three characteristics

Note: Sum of the percentages exceed 100% as respondents can select multiple options.
Q64. What are the most important characteristics of a vehicle subscription? Please select all that apply.
Sample size: n= 153 [Austria]; 185 [Belgium]; 239 [France]; 289 [Germany]; 235 [Italy]; 253 [Poland]; 470 [Saudi Arabia]; 230 [South Africa]; 226 [Spain]; 346 [Turkey]; 269 [UK]

At the same time, some consumers are concerned about vehicle availability, total ownership cost, a sense of losing ownership, and the perception of higher monthly fees associated with subscription services.

Main concerns regarding vehicle subscription services

Concerns regarding vehicle subscription services	Austria	Belgium	France	Germany	Italy	Poland	Saudi Arabia	South Africa	Spain	Turkey	UK
Losing the sense of ownership	34%	35%	29%	35%	29%	42%	40%	**47%**	31%	29%	41%
Limited possibility for configuration	20%	15%	14%	17%	13%	19%	24%	21%	13%	24%	14%
Total cost of ownership (i.e., price)	35%	34%	44%	35%	**42%**	**45%**	34%	43%	42%	37%	**46%**
Vehicle availability/waiting time	**54%**	**45%**	37%	**43%**	35%	37%	40%	**47%**	**43%**	**45%**	40%
Receiving and/or returning the vehicle	35%	34%	26%	27%	20%	28%	32%	29%	27%	35%	27%
Lack of contact with the dealer (i.e., for maintenance, repair)	20%	18%	16%	17%	16%	27%	26%	34%	21%	27%	17%
Difficulty ordering vehicle via an online channel	22%	16%	15%	16%	17%	20%	30%	27%	21%	19%	21%
Distrust for subscription service provider	31%	24%	25%	28%	17%	28%	31%	30%	26%	29%	24%
Higher monthly fees compared to leasing	37%	34%	**45%**	35%	35%	31%	**43%**	**47%**	34%	24%	37%
Other	6%	5%	2%	5%	2%	2%	0%	1%	2%	1%	6%

Top three concerns

Note: Sum of the percentages exceed 100% as respondents can select multiple options.
Q65. What are your main concerns regarding vehicle subscription services? Please select all that apply.
Sample size: n= 1,002 [Austria]; 1,006 [Belgium]; 1,000 [France]; 1,500 [Germany]; 1,001 [Italy]; 1,000 [Poland]; 1,000 [Saudi Arabia]; 1,005 [South Africa]; 1,006 [Spain]; 1,000 [Turkey]; 1,500 [UK]

5 About the study

About the study

The 2024 study includes ~27,000 consumer responses from 26 countries around the world.

Americas	Sample
Argentina (A	
Canada (CA)	1,000
Mexico (MX)	1,000
United States (US)	1,003

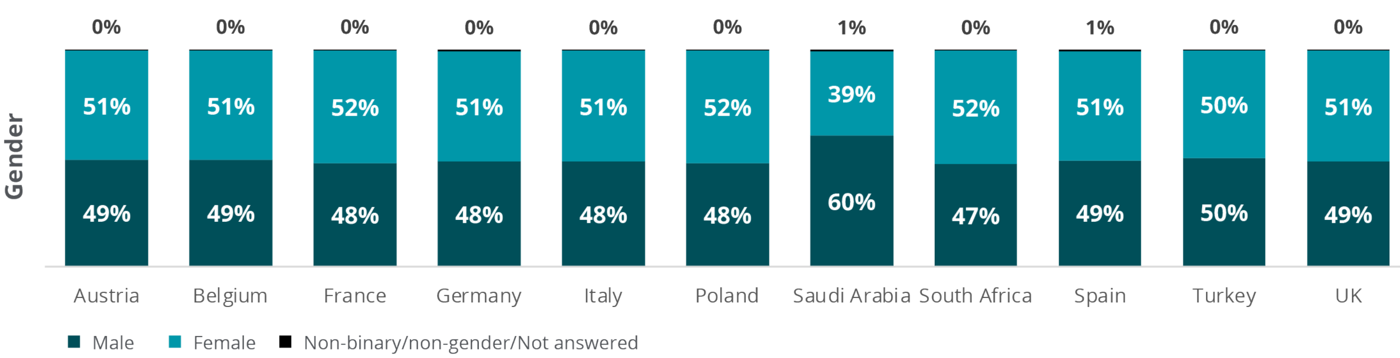
EMEA	Sample
Austria (AT)	1,002
Belgium (BE)	1,006
France (FR)	1,000
Germany (DE)	1,500
Italy (IT)	1,001
Poland (PL)	1,000
Saudi Arabia (SA)	1,000
South Africa (ZA)	1,005
Spain (ES)	1,006
Turkey (TR)	1,000
United Kingdom (GB)	1,500

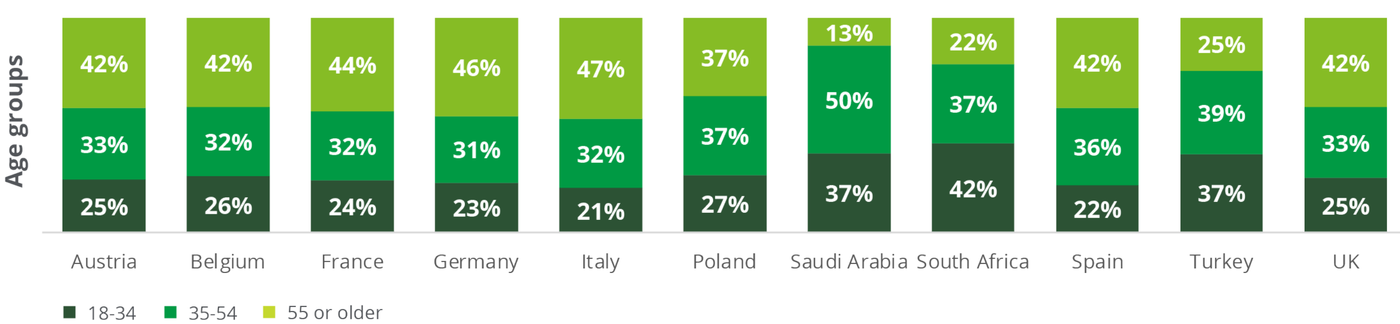
Asia-Pacific	Sample
Australia (AU)	1,003
China (CN)	1,005
India (IN)	1,000
Indonesia (ID)	1,005
Japan (JP)	1,006
Malaysia (MY)	957
Philippines (PH)	1,000
Republic of Korea (KR)	1,000
Singapore (SG)	1,000
Thailand (TH)	1,000
Vietnam (VN)	977

Study methodology
The study is fielded using an online panel methodology where consumers of driving age are invited to complete the questionnaire (translated into local languages) via email.

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

Study demographics





Note: Non-binary/Non-gender confirming/Prefer not to answer percentage for Saudi Arabia, and Spain is 1%
Sample size: n= 1,002 [Austria]; 1,006 [Belgium]; 1,000 [France]; 1,500 [Germany]; 1,001 [Italy]; 1,000 [Poland]; 1,000 [Saudi Arabia]; 1,005 [South Africa]; 1,006 [Spain]; 1,000 [Turkey]; 1,500 [UK]

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