2021 Global Automotive Consumer Study
Key Findings: Turkey
February 2021
Agenda

• About the study
• Technology in focus: Vehicle electrification
• Vehicle financing trends
• Future vehicle intentions
About the study
The 2021 study includes more than 24K consumer responses across 23 global markets.

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: "n" represents the number of survey respondents in each country.
• 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 which Turkey is also involved in last three 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.
Technology in focus: vehicle electrification
Despite financial concerns caused by the COVID-19 pandemic, interest in alternative fuel vehicles continues.

Type of engine in next vehicle

Note: "Other" includes engine types such as compressed natural gas, ethanol, and hydrogen fuel cells

Q42. What type of engine would you prefer in your next vehicle?

Sample size: n= 954 [2021]; 1,154 [2020]

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Consumers' choices for the next vehicle differ significantly between countries.

Consumer powertrain preferences for their next vehicle

<table>
<thead>
<tr>
<th>Country</th>
<th>Gas/diesel (ICE)</th>
<th>Hybrid electric (HEV)</th>
<th>Battery electric vehicle (BEV)</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>US</td>
<td>74%</td>
<td>16%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>India</td>
<td>68%</td>
<td>24%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Germany</td>
<td>59%</td>
<td>25%</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td>China</td>
<td>55%</td>
<td>29%</td>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>Turkey</td>
<td>53%</td>
<td>34%</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>Japan</td>
<td>45%</td>
<td>45%</td>
<td>7%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Note: "Other" category includes ethanol, CNG, and hydrogen fuel cell.

Q42. What type of engine would you prefer in your next vehicle?

Sample size: Germany=779; US=879; China=886; India=880; Japan=597; Turkey=954

Deloitte Global Automotive Consumer Study
For the people intending to buy an EV, it’s mostly about lowering fuel costs, a better driving experience, and reducing emissions.

Type of engine in your next vehicle

Hybrid/Electric; 42%
Gasoline/Diesel (ICE); 53%
Other; 5%

Ranking of factors in terms of their impact on your decision to acquire an electrified vehicle (highest to lowest)

1. Lower fuel costs
2. Better driving experience (e.g., quieter, more performance)
3. Concern about climate change / reduced emissions
4. Less maintenance
5. Government incentives / stimulus programs

Note: "Other" includes engine types such as compressed natural gas, ethanol, and hydrogen fuel cells

Q42. What type of engine would you prefer in your next vehicle?
Sample size: n= 954

Q43. Please rank the following factors in terms of their impact on your decision to acquire an electrified vehicle (highest to lowest).
Sample size: n= 403

Turkey
Concerns around charging infrastructure and EV range continue to be top of mind while consumers are somewhat less concerned about charging time.

Greatest concern regarding all battery-powered electric vehicles

- Lack of electric vehicle charging infrastructure: 31% (2021), 30% (2020)
- Driving range: 22% (2021), 22% (2020)
- Time required to charge: 18% (2021), 24% (2020)
- Safety concerns with battery technology: 11% (2021), 14% (2020)
- Cost/price premium: 9% (2021), 9% (2020)
- Lack of choice: 9% (2021), 9% (2020)
- Other: 1% (2021), 0% (2020)

Note: Lack of choice is not provided as an option in the 2018 study.

Q47. What is your greatest concern regarding all battery-powered electric vehicles?

Sample size: n= 954 [2021]; 1,268 [2020]

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55% of consumers who want to buy electric vehicles are ready to pay 200K lira and less, 29% in the range of 200 - 300K TL and 15% are ready to pay 300K TL and above.

Percentage of consumers willing to shop for an electrified vehicle in the price range of...

- Less than 100,000 lira: 9%
- 100,000 lira to less than 150,000 lira: 25%
- 150,000 lira to less than 200,000 lira: 21%
- 200,000 lira to less than 300,000 lira: 29%
- 300,000 lira to less than 500,000 lira: 14%
- 500,000 lira or more: 1%
- Don't know/not sure: 1%

Q44. In which of the following price ranges will you be shopping for an electrified vehicle? (Please indicate what you would expect to pay after any dealer/brand or government incentives that might be available)

Sample size: n=403

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Most consumers intending to acquire an EV expect to charge it at home. Consumers' biggest concern for EV is the lack of a suitable charging network.

Location people expect to charge their electrified vehicle most often

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

Sample size: Germany=246; US=185; China=352; India=244; Japan=314; Turkey= 403

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One-third of consumers are willing to pay more than 25,000 lira for an alternative motor vehicle.

Willingness to pay for technologies

<table>
<thead>
<tr>
<th>Technology</th>
<th>I wouldn’t pay more</th>
<th>Up to 5,000 lira</th>
<th>5,000 lira to 25,000 lira</th>
<th>More than 25,000 lira</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infotainment technologies</td>
<td>16%</td>
<td>24%</td>
<td>19%</td>
<td>17%</td>
</tr>
<tr>
<td>Autonomous technologies</td>
<td>22%</td>
<td>34%</td>
<td>27%</td>
<td>22%</td>
</tr>
<tr>
<td>Connected technologies</td>
<td>45%</td>
<td>32%</td>
<td>44%</td>
<td>22%</td>
</tr>
<tr>
<td>Alternative engine technologies</td>
<td>10%</td>
<td>10%</td>
<td>6%</td>
<td>25%</td>
</tr>
<tr>
<td>Safety technologies</td>
<td>17%</td>
<td>10%</td>
<td>6%</td>
<td>41%</td>
</tr>
</tbody>
</table>

Note: Did not consider “Don’t know” responses

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

Sample size: n=990
As for other CASE technologies, consumers are interested in connected, autonomous vehicles, but 57% are concerned about vehicle security.

Percentage of consumers who agree that ...

- As vehicles become more connected via wireless internet, they are more beneficial for me: 76%
- With connected vehicles, I fear someone hacking into my car and risking my personal safety: 57%
- Fully self-driving cars will not be safe: 29%

Q3: To what extent do you agree or disagree with the following statements?

Sample size: n=1,016

Turkey
Safety technologies are top of mind as people most desire blind spot warning and emergency braking features in their next vehicle.

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

- Automatic emergency braking: 88%
- Blind spot warning/alert: 88%
- Built-in navigation system: 85%
- Lane departure warning: 81%
- Electronic parking assist: 80%
- 360-degree camera system: 80%
- Adaptive cruise control: 80%
- Automatic/dual zone climate control: 77%
- Physical knobs/buttons for controls (e.g., radio, heater): 76%
- Built-in WiFi hotspot: 71%
- Over-the-air software updates: 68%
- Heated/cooled seats: 67%
- Semi-autonomous drive mode (e.g., Autopilot): 66%
- Apple CarPlay / Android Auto interface: 64%

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

Sample size: n= 989

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Vehicle financing trends
More than half of consumers spent at least 3 hours researching financing options prior to acquiring their vehicle.

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

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

Sample size: n=796

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Global consumer behaviour varies significantly regarding the amount of time spent researching finance options prior to acquiring a vehicle.

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

<table>
<thead>
<tr>
<th>Country</th>
<th>&lt;1 hr</th>
<th>1 to &lt;3 hrs</th>
<th>3 to &lt;5 hrs</th>
<th>5 hrs +</th>
<th>Did not research</th>
</tr>
</thead>
<tbody>
<tr>
<td>Turkey</td>
<td>11%</td>
<td>27%</td>
<td>23%</td>
<td>31%</td>
<td>8%</td>
</tr>
<tr>
<td>India</td>
<td>7%</td>
<td>31%</td>
<td>31%</td>
<td>25%</td>
<td>6%</td>
</tr>
<tr>
<td>China</td>
<td>5%</td>
<td>28%</td>
<td>34%</td>
<td>25%</td>
<td>8%</td>
</tr>
<tr>
<td>Japan</td>
<td>11%</td>
<td>26%</td>
<td>13%</td>
<td>21%</td>
<td>29%</td>
</tr>
<tr>
<td>Germany</td>
<td>13%</td>
<td>14%</td>
<td>10%</td>
<td>10%</td>
<td>53%</td>
</tr>
<tr>
<td>US</td>
<td>20%</td>
<td>20%</td>
<td>13%</td>
<td>15%</td>
<td>32%</td>
</tr>
</tbody>
</table>

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

Sample size: Germany=746; US=826; China=790; India=692; Japan=470; Turkey = 796

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Top three most important factors for financing are receiving the lowest rate from a trusted lender with an easy-to-use payment interface.

Most important things related to loan/lease account

- Receiving lowest possible rate for my credit rating: 53%
- Easy process to pay or set up auto-pay: 47%
- Choosing a recognizable name and trusted, established auto lender: 46%
- Flexibility (e.g., early termination, vehicle swap): 45%
- Access to loan payoff and equity status: 43%
- Convenience: 41%
- All-in rates: 40%
- Quick to speak with a live agent on the phone: 28%
- Simple/easy website/mobile app to manage account: 25%
- Receiving customized vehicle offers for accessories, services, etc.: 25%
- Ability to text or message your auto lender: 16%

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

Sample size: n=796
Consumers, across age groups, are interested in loan accounts that provide them the lowest finance rate.

Most important things related to loan/lease account by age groups

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

Sample size: n=291 [18-34]; 324 [35-54]; 181 [55 or older]

Turkey
Younger consumers most prefer completing a finance application via their mobile device while the older age group wants to deal with a salesperson.

Most preferred way to complete a vehicle financing application

Q38. How would you most prefer to complete a vehicle financing application?

Sample size: n= 332 [18-34]; 333 [35-54]; 189 [55 or older]

Turkey
Overall, majority of people are somewhat/very likely to buy additional finance products as part of a bundle and credit protection on their loan.

Percentage of consumers who are somewhat/very likely to purchase additional finance-related products if they were bundled into vehicle’s single monthly payment

<table>
<thead>
<tr>
<th>Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>75%</td>
</tr>
<tr>
<td>18-34</td>
<td>73%</td>
</tr>
<tr>
<td>35-54</td>
<td>78%</td>
</tr>
<tr>
<td>55 or older</td>
<td>73%</td>
</tr>
</tbody>
</table>

Percentage of consumers who are somewhat/very likely to purchase credit protection on a new loan/lease

<table>
<thead>
<tr>
<th>Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>69%</td>
</tr>
<tr>
<td>18-34</td>
<td>62%</td>
</tr>
<tr>
<td>35-54</td>
<td>78%</td>
</tr>
<tr>
<td>55 or older</td>
<td>67%</td>
</tr>
</tbody>
</table>

Q36. How likely would you be to purchase additional finance-related products (e.g., insurance, extended warranty) if they were bundled into your vehicle’s single monthly payment?

Q37. How likely would you be to purchase credit protection on a new loan/lease (i.e., a small increase in monthly payment for protection that pay offs or reduces your amount owed in the case of disability, death, job loss, etc.)?

Sample size: n= 811 [Overall]; 307 [18-34]; 325 [35-54]; 179 [55 or older]

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While websites are the most preferred way for older consumers to interact with their lender, a mobile option is more important for younger consumers.

Most preferred way of interacting with auto lender by age groups

Note: Sum of preferred ways of interacting with auto lender do not add up to 100% as N/A % was not shown

Q15. What is your most preferred way of interacting with your auto lender?

Sample size: n=291 [18-34]; 324 [35-54]; 181 [55 or older]

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Consumers are willing to wait longer to receive a decision about their vehicle financing application – only 7% want it in real-time.

Acceptable wait time to receive a decision on vehicle financing application

<table>
<thead>
<tr>
<th>Time Frame</th>
<th>18-34</th>
<th>35-54</th>
<th>55 or older</th>
</tr>
</thead>
<tbody>
<tr>
<td>Real-time</td>
<td>7%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Less than one hour</td>
<td>26%</td>
<td>24%</td>
<td>21%</td>
</tr>
<tr>
<td>One hour to less than 3 hours</td>
<td>32%</td>
<td>38%</td>
<td>36%</td>
</tr>
<tr>
<td>3 hours to 24 hours</td>
<td>24%</td>
<td>25%</td>
<td>28%</td>
</tr>
<tr>
<td>More than 24 hours</td>
<td>11%</td>
<td>5%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Note: Sum of %s for 35-54 age group do not add to 100% due to rounding

Q39. When applying for vehicle financing, how long is an acceptable wait time to receive a decision?

Sample size: n=332 [18-34]; 333 [35-54]; 189 [55 or older]
Two-thirds of consumers are comfortable with completing a vehicle finance transaction via live video on their mobile device.

Q40. How comfortable would you be completing a finance transaction (i.e., submit application and sign the contract) via live video on your mobile device?

Overall
- Not comfortable at all: 4%
- Not very comfortable: 13%
- Neutral: 17%
- Somewhat comfortable: 33%
- Very comfortable: 33%

By age groups
- Overall
  - Not at all/not very comfortable: 66%
  - Neutral: 60%
  - Somewhat/very comfortable: 75%
- 18-34
  - Not at all/not very comfortable: 17%
  - Neutral: 19%
  - Somewhat/very comfortable: 21%
- 35-54
  - Not at all/not very comfortable: 17%
  - Neutral: 15%
  - Somewhat/very comfortable: 10%
- 55 or older
  - Not at all/not very comfortable: 19%
  - Neutral: 19%
  - Somewhat/very comfortable: 20%

Sample size: n= 854 [Overall]; 332 [18-34]; 333 [35-54]; 189 [55 or older]

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Q41. What part(s) of the finance process do you dislike the most? (Select all that apply)

Sample size: n= 854

Turkey

Completing paper-based forms, disclosing personal info, and approval wait times are the most disliked aspects of the financing process.

Most disliked part(s) of the finance process

- Completing paper-based forms: 43%
- Disclosing personal information: 40%
- Waiting for approval: 38%
- Lack of transparency in the process: 36%
- “Hard pull” of your credit report: 29%
- Understanding finance terms and language: 28%
- Lack of control of the process: 27%
- Completing online forms: 24%
- Other: 0%
Finally, more than a third of younger consumers have requested a vehicle payment deferment this year, perhaps as a result of the pandemic.

Percentage of consumers who requested for a payment deferment

Note: Respondents can select either "Yes", or "No", or "Not applicable"
Q16: Have you requested a payment deferment this year?
Sample size: n= 796 (Overall); 291 [18-34]; 324 [35-54]; 181 [55 or older]

Turkey

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The overall average for the number of consumers requesting a payment deferment this year may be masking an underlying concern among younger consumers in some markets around the world.

Percentage of consumers who have requested a payment deferment this year (% Yes)

Note: Respondents can select either “Yes”, or “No”, or “Not applicable

Q16: Have you requested a payment deferment this year?

Sample size: Germany=746; US=826; China=790; India=692; Japan=470; Turkey= 796

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Future vehicle intentions
56% of people have altered their timeline for acquiring their next vehicle, and majority of them are thinking of delaying their purchase.

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

<table>
<thead>
<tr>
<th>Alteration of Timeline</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No, I haven’t altered my timeline for acquiring my next vehicle; 44%</td>
<td></td>
</tr>
<tr>
<td>Yes, I intend to acquire my next vehicle sooner than I originally planned; 15%</td>
<td></td>
</tr>
<tr>
<td>Yes, I intend to acquire my next vehicle later than I originally planned; 41%</td>
<td></td>
</tr>
</tbody>
</table>

Availability of a government stimulus program influenced your decision to acquire your next vehicle sooner than originally planned

<table>
<thead>
<tr>
<th>Influence Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No/very little influence</td>
<td>36%</td>
</tr>
<tr>
<td>Some/significant influence</td>
<td>60%</td>
</tr>
<tr>
<td>No stimulus program available</td>
<td>5%</td>
</tr>
</tbody>
</table>

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

Acquire next vehicle sooner if you received a pre-approved special finance rate or lease payment

<table>
<thead>
<tr>
<th>Likelihood</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not at all/not very likely</td>
<td>26%</td>
</tr>
<tr>
<td>Neutral</td>
<td>23%</td>
</tr>
<tr>
<td>Somewhat/very likely</td>
<td>51%</td>
</tr>
</tbody>
</table>

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

Q24. To what extent has the availability of a government stimulus program influenced your decision to acquire your next vehicle sooner than originally planned?

Q25. How likely would you be to acquire your next vehicle sooner if you received a pre-approved special finance rate or lease payment?

Sample size: n= 989 [Q23]; n= 146 [Q24]; n= 403 [Q25]
The schedule that consumers plan to buy their next vehicle varies by country.

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

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

Sample size: Germany=804; US=901; China=899; India=948; Japan=678; Turkey=989

<table>
<thead>
<tr>
<th>Country</th>
<th>No</th>
<th>Yes, later than planned</th>
<th>Yes, sooner than planned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>74%</td>
<td>14%</td>
<td>8%</td>
</tr>
<tr>
<td>Germany</td>
<td>71%</td>
<td>17%</td>
<td>15%</td>
</tr>
<tr>
<td>US</td>
<td>66%</td>
<td>17%</td>
<td>24%</td>
</tr>
<tr>
<td>China</td>
<td>47%</td>
<td>29%</td>
<td>24%</td>
</tr>
<tr>
<td>Turkey</td>
<td>41%</td>
<td>44%</td>
<td>15%</td>
</tr>
<tr>
<td>India</td>
<td>37%</td>
<td>38%</td>
<td>25%</td>
</tr>
</tbody>
</table>
A third of consumers are thinking about a different kind of vehicle as a result of the pandemic – 59% of these people want more fuel efficiency.

COVID-19 pandemic 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?

Q31. How have you changed your thinking about what kind of vehicle you will acquire next? (Select all that apply)

Sample size: n= 989 [Q30]; n= 373 [Q31]

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Pandemic-induced social distancing is an important factor pushing consumers to think about vehicle ownership.

Percentage of consumers who are planning to acquire next vehicle primarily due to the need of maintaining social distancing

Q28. Are you planning to acquire your next vehicle primarily due to the need of maintaining social distance while traveling?

Sample size: n= 989 (overall); 394 [18-34]; 366 [35-54]; 229 [55 or older]

Overall: 16% Yes, 28% No, 56% Not sure
18-34: 20% Yes, 27% No, 53% Not sure
35-54: 11% Yes, 25% No, 64% Not sure
55 or older: 18% Yes, 32% No, 50% Not sure
Virtual vehicle sales going forward? Yes, but a significant number of people still want to acquire their next vehicle in-person at the dealership.

Most preferred way to acquire next vehicle

- Partially virtual process (i.e., online shopping, physical test drive, digital document signing)
- Fully virtual process (i.e., online shopping, digital document signing, vehicle drop-off)
- In-person (i.e., face-to-face at the dealership)

Q48. How would you most prefer to acquire your next vehicle?
Sample size: n= 954 [Overall] ; 377 [18-34]; 357 [35-54]; 220 [55 or older]
Will there be virtual vehicle sales in the future? Absolutely, but let’s not write off the in-person experience just yet as most consumers still want it going forward.

**Most preferred way to acquire next vehicle**

<table>
<thead>
<tr>
<th>Country</th>
<th>In-person</th>
<th>Partially virtual</th>
<th>Fully virtual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>80%</td>
<td>6%</td>
<td>14%</td>
</tr>
<tr>
<td>Turkey</td>
<td>79%</td>
<td>10%</td>
<td>11%</td>
</tr>
<tr>
<td>Germany</td>
<td>76%</td>
<td>8%</td>
<td>16%</td>
</tr>
<tr>
<td>US</td>
<td>71%</td>
<td>12%</td>
<td>17%</td>
</tr>
<tr>
<td>China</td>
<td>65%</td>
<td>14%</td>
<td>21%</td>
</tr>
<tr>
<td>India</td>
<td>60%</td>
<td>13%</td>
<td>27%</td>
</tr>
</tbody>
</table>

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

Sample size: Germany=779; US=879; China=886; India=880; Japan=597; Turkey=954
Even if people are looking for a virtual sales experience, they would prefer to acquire their next vehicle from a dealer or vehicle manufacturer.

Most preferred way to acquire next vehicle via a virtual process

<table>
<thead>
<tr>
<th>Manufacturer</th>
<th>Authorized Dealer</th>
<th>Third Party Retailer</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>39%</td>
<td>54%</td>
<td>13%</td>
</tr>
<tr>
<td>18-34</td>
<td>30%</td>
<td>53%</td>
<td>16%</td>
</tr>
<tr>
<td>35-54</td>
<td>35%</td>
<td>41%</td>
<td>6%</td>
</tr>
<tr>
<td>55 or older</td>
<td>48%</td>
<td>35%</td>
<td>17%</td>
</tr>
</tbody>
</table>

Note: Sum of %s for Overall 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: n= 258 [Overall]; 119 [18-34]; 88 [35-54]; 51 [55 or older]
Convenience coupled with speed and 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

- **Ease of use**: 20%
- **Convenience**: 28%
- **Speed of transaction**: 25%
- **Necessity (i.e., health concerns about physical interactions)**: 18%
- **General desire to avoid going to a dealer**: 8%
- **Other**: 20%

Note: Sum of %s 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: n= 258

Turkey
The reason people want a virtual buying process for their next vehicle can vary significantly by country.

### Main reason to acquire next vehicle via a virtual process

<table>
<thead>
<tr>
<th>Country</th>
<th>Convenience</th>
<th>Ease of use</th>
<th>Speed</th>
<th>Necessity</th>
<th>Desire to avoid going to dealer</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>21%</td>
<td>28%</td>
<td>24%</td>
<td>25%</td>
<td>2%</td>
</tr>
<tr>
<td>India</td>
<td>28%</td>
<td>23%</td>
<td>22%</td>
<td>23%</td>
<td>4%</td>
</tr>
<tr>
<td>Turkey</td>
<td>28%</td>
<td>20%</td>
<td>25%</td>
<td>18%</td>
<td>8%</td>
</tr>
<tr>
<td>US</td>
<td>34%</td>
<td>19%</td>
<td>21%</td>
<td>16%</td>
<td>10%</td>
</tr>
<tr>
<td>Germany</td>
<td>40%</td>
<td>15%</td>
<td>21%</td>
<td>17%</td>
<td>7%</td>
</tr>
<tr>
<td>Japan</td>
<td>42%</td>
<td>10%</td>
<td>23%</td>
<td>20%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Note: For Germany, "desire to avoid going to dealer" includes one percentage point from "Other" reason.

Q50. What is the main reason you would prefer to acquire your next vehicle via a virtual process?

Sample size: Germany=188; US=258; China=312; India=350; Japan=117; Turkey=258

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

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

- I have to see the vehicle before I buy it: 78%
- I have to test drive vehicle before I buy it: 60%
- I prefer to negotiate the price of the vehicle in person: 43%
- I want to have my questions answered by a real person: 40%
- I don't feel comfortable making such a big purchase online: 34%
- I would like to build a relationship with the dealer for service: 33%
- I want to have a personal contact in case something goes wrong: 28%
- I want to be treated like my business is important: 10%
- Other: 0%

Q51. What are the main reasons you are not interested in acquiring your next vehicle via virtual process? (Select all that apply)

Sample size: n= 750

Turkey
And, some things never change as consumers still want a good deal with transparent pricing before they commit to buying a vehicle.

Top three most important aspects of the purchase experience

- Physical interaction with the vehicle (i.e. test drive): 49%
- Getting a good deal: 43%
- Transparent pricing: 43%
- Getting all my questions answered: 34%
- Having a resource for post-purchase needs: 30%
- To be offered different financing and usage-based models: 26%
- Building trust in the salesperson: 20%
- Making good use of my time: 20%
- Ability to complete all or some of the process virtually: 14%
- Convenient location: 12%
- Low pressure experience: 8%

Q52. When looking to acquire your next vehicle, what are the top three most important aspects of the purchase experience? (Select top three)

Sample size: n=954

Turkey
In fact, only 28% of consumers are either somewhat or very likely to buy their next vehicle without a test drive.

Likelihood of acquiring next vehicle without a test drive

Q53. How likely are you to acquire your next vehicle without a test drive?
Sample size: n= 954 [Overall]; 377 [18-34]; 357 [35-54]; 220 [55 or older]

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What about “virtual servicing”? Consumers are interested and are ready to pay a reasonable fee for those services.

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

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Yes, I’m interested and I would pay a reasonable fee for the service</th>
<th>Yes, I’m interested as long as it’s free</th>
<th>No, I’m not interested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>47%</td>
<td>44%</td>
<td>9%</td>
</tr>
<tr>
<td>18-34</td>
<td>48%</td>
<td>42%</td>
<td>10%</td>
</tr>
<tr>
<td>35-54</td>
<td>52%</td>
<td>57%</td>
<td>8%</td>
</tr>
<tr>
<td>55 or older</td>
<td>34%</td>
<td>40%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Note: Sum of %s for 35-54 do not add to 100% due to rounding

Q20: To what extent are you interested in the following services?
Sample size: n= 635 (Overall); 236 (18-34); 268 (35-54); 131 (55 or older)

Percentage of consumers who are interested in having a technician come to their home to perform required service

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Yes, I’m interested and I would pay a reasonable fee for the service</th>
<th>Yes, I’m interested as long as it’s free</th>
<th>No, I’m not interested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>51%</td>
<td>40%</td>
<td>8%</td>
</tr>
<tr>
<td>18-34</td>
<td>56%</td>
<td>36%</td>
<td>8%</td>
</tr>
<tr>
<td>35-54</td>
<td>53%</td>
<td>40%</td>
<td>7%</td>
</tr>
<tr>
<td>55 or older</td>
<td>40%</td>
<td>49%</td>
<td>11%</td>
</tr>
</tbody>
</table>

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

Note: Sum of %s for 35-54 do not add to 100% due to rounding

Turkey
Interest in subscription services that offer different brand of vehicle or different models from same brand is relatively high across age groups.

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

Q59. How interested are you in each of the following scenarios?

Sample size: n= 1,033 [Overall]; 409 [18-34]; 379 [35-54]; 245 [55 or older]

Turkey

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And, consumers are ready to pay more for a subscription with nearly half of people saying they expect to pay something up to 20% more.

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

- different vehicle model from the same brand
- different brand of vehicle
- different pre-owned vehicles

Note: Sum of %s for different brand of vehicle and different pre-owned vehicles do not add to 100% due to rounding.

Sample size: n= 793

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: n= 825

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 brand of vehicle?)

Sample size: n= 734

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 different pre-owned vehicles?)

Turkey
Finally, most consumers seem to have the most trusted relationship with the brand of vehicle they own.

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

- With the manufacturer/brand of vehicle I currently own: Overall 38%, 18-34 44%, 35-54 42%, 55 or older 21%
- With the dealership where I acquired my vehicle: Overall 25%, 18-34 23%, 35-54 25%, 55 or older 26%
- With the dealership where I normally service my vehicle: Overall 27%, 18-34 25%, 35-54 22%, 55 or older 40%
- With my lender/leasing company: Overall 4%, 18-34 5%, 35-54 4%, 55 or older 2%
- None of the above: Overall 6%, 18-34 4%, 35-54 5%, 55 or older 12%

Note: Sum of %s for 18-34 and 55 or older age groups do not add to 100% due to rounding.

Q21: With whom do you have the most trusted relationship?
Sample size: n= 823 [Overall]; 298 [18-34]; 331 [35-54]; 194 [55 or older]

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2021 Deloitte Global Automotive Consumer Study
Consumers across geographies feel most connected to either the brand of vehicle they currently own or the dealer from which they bought it.

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

<table>
<thead>
<tr>
<th>Country</th>
<th>Brand (%)</th>
<th>Purchasing dealer (%)</th>
<th>Servicing dealer (%)</th>
<th>Financial lender (%)</th>
<th>None of the above (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>55%</td>
<td>29%</td>
<td>14%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>India</td>
<td>55%</td>
<td>28%</td>
<td>13%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
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<td>6%</td>
</tr>
<tr>
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<td>43%</td>
<td>21%</td>
<td>1%</td>
<td>6%</td>
</tr>
<tr>
<td>US</td>
<td>27%</td>
<td>34%</td>
<td>14%</td>
<td>2%</td>
<td>23%</td>
</tr>
<tr>
<td>Germany</td>
<td>23%</td>
<td>36%</td>
<td>21%</td>
<td>1%</td>
<td>19%</td>
</tr>
</tbody>
</table>

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

Sample size: Germany=779; US=884; China=812; India=742; Japan=483; Turkey=823

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Vehicle sales moving online? Not so fast

Even though virtual vehicle sales may be here to stay, a majority of consumers would still prefer to acquire their next vehicle in-person at an authorized dealer.

How much are consumers willing to spend on EV's?

55% of consumers who want to buy electric vehicles are ready to pay 200K lira and less, 29% in the range of 200 -300K TL and 15% are ready to pay 300K TL and above.

Downside risk for demand in some markets

As a result of the pandemic, a significant number of consumers in Turkey have altered their timeline for acquiring their next vehicle with some people planning to delay it as they consider more affordable options.

EVs still have a few hurdles to clear

Although the longer-term trend toward EVs appears to be solidifying, consumers may be looking for more familiarity and affordability in the face of near-term uncertainty.

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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.
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