



Driving connectivity

Global Automotive Consumer Study:
Future of Automotive Technologies

United Kingdom Insights
March 2017

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Global Automotive Consumer Study

Future of Automotive Technologies

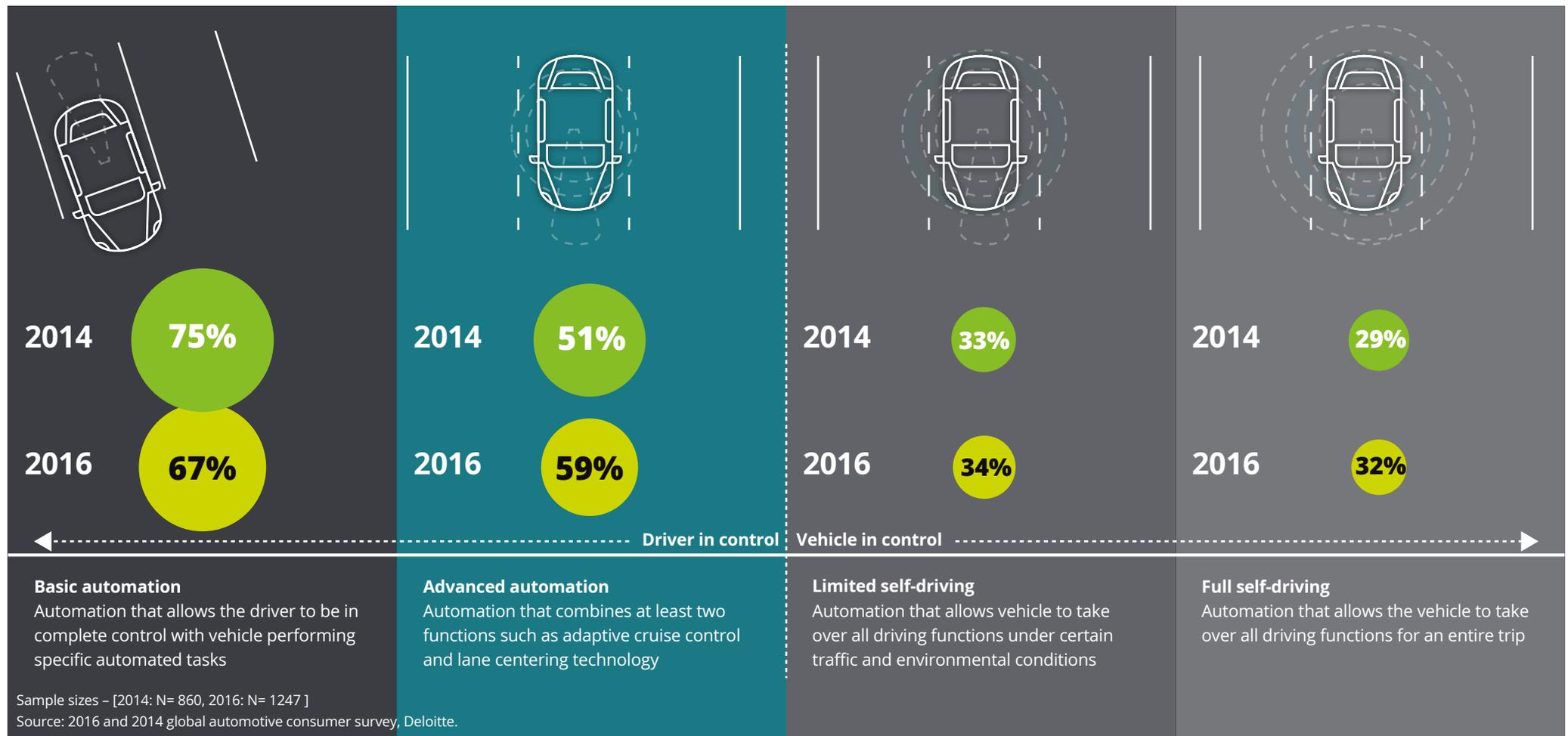
The theme of the 2016 Global Automotive Consumer Survey was vehicle technologies: which ones do consumers prefer and how much do they want to pay. We asked 1,250 UK consumers what they think about self-driving cars in general, and also looked at views on ride-sharing, alternative engine types, and data use.

Respondents get most excited about automation when it is features they can actually use now. The interest drops a lot when consumers are asked to imagine a hypothetical future that seems some ways off.

A track record of safety would make people trust driverless cars most – they want to see with their own eyes what these cars can do.

Desire for advanced automation remains low

Consumer desirability for advanced automation has increased over the past two years but remains more or less unchanged for limited and full self-driving.



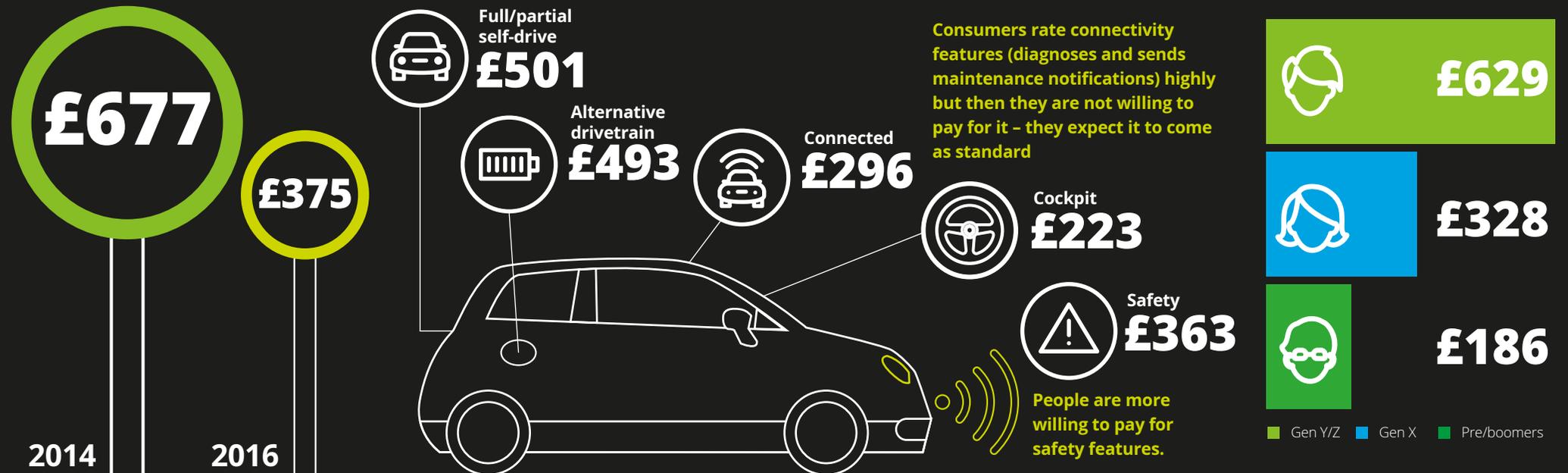
Vehicle automation

Half of respondents are not willing to pay anything for self-drive. The other half are willing to pay a high amount, recognising that the technology is new and will cost a lot at first. This is because younger generations – to a very large margin – are willing to pay more.

Willingness to pay for vehicle automation has declined.

Average expected price by technology type

The younger the generation, the more people are willing to pay for vehicle technologies



Sample sizes – [2016: Pre boomers, N= 544; Gen X, N= 253; Gen Y/Z, N= 451]

Source: 2016 and 2014 global automotive consumer survey, Deloitte.
 Sample sizes – [2014: N= 860, 2016: N= 1247]

UK consumers – and every other market – rate the same four safety features the highest

These are the building blocks of automated driving.

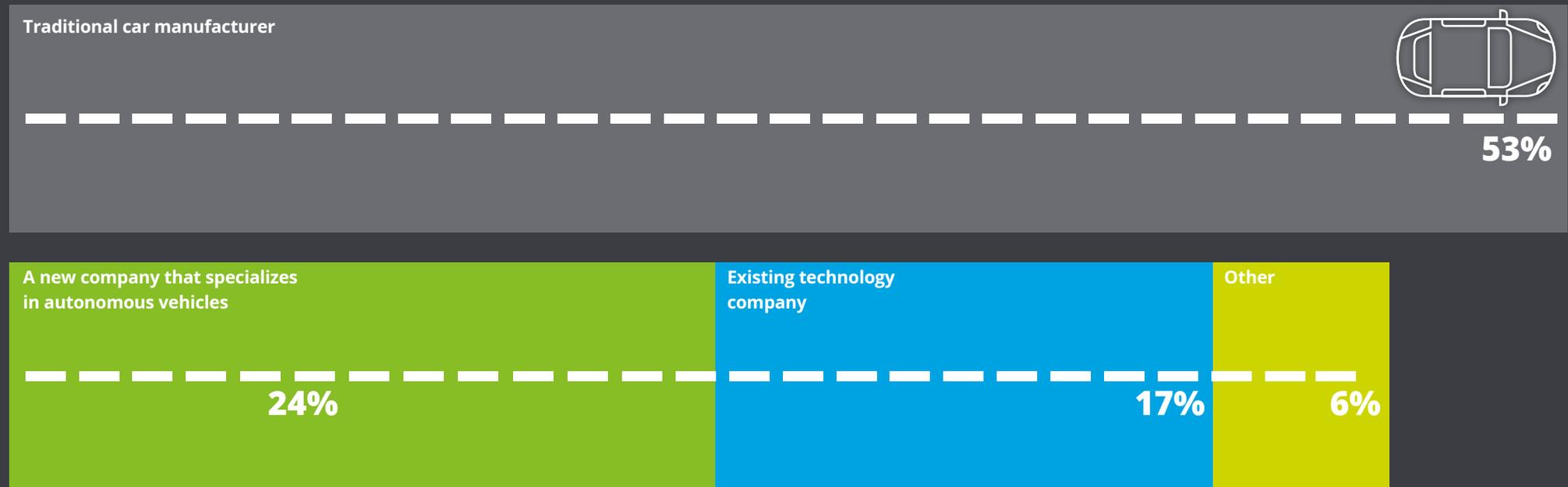
	Rank	Technology that...	Category
Most useful	1	Recognises objects on road and avoids collision	Safety
	2	Informs driver of dangerous driving situations	Safety
	3	Blocks driver from dangerous driving situations	Safety
	4	Takes steps in medical emergency or accident	Safety
	5	Diagnoses and sends maintenance notifications	Connectivity
	6	Enables remote shutdown of stolen vehicle	Cyber security
	7	Helps enhance fuel efficiency	Fuel efficiency
Moderately useful	8	Prevents theft by restricting unauthorised access	Cyber security
	9	Enables use of advanced lightweight materials	Fuel efficiency
	10	Lowers the impact on the environment	Environment
	11	Enables vehicles-to-vehicle and road communication	Connectivity
	12	Enables usage of alternative fuels	Environment
	13	Prevents hacking into vehicle systems	Cyber security
	14	Monitors the physical health of the driver	Safety
	15	Assists in locating, reserving, and navigating to a parking space	Service enabler
	16	Coaches the driver to drive safely	Cost efficiency
	17	Automates tasks for comfort and convenience	Convenience

	Rank	Technology that...	Category
Least useful	18	Enables interactive vehicle operational information	Convenience
	19	Enables full self-driving capabilities	Self-drive
	20	Enables remote/automatic software updates of the vehicle	Connectivity
	21	Enables high speed, long distance, highway 'auto-pilot' mode	Self-drive
	22	Enables hands-free interior controls	Convenience
	23	Enables low-speed urban 'auto pilot' mode	Self-drive
	24	Enables the use of self-healing paint	Miscellaneous
	25	Automatically pays parking and toll fees	Service enabler
	26	Makes available adjustable settings to enhance vehicle performance	Performance
	27	Empowers customer to personalise vehicles	Miscellaneous
	28	Allows the driver to control automated home systems	Service enabler
	29	Allows use of smartphone applications through the vehicle dashboard	Connectivity
	30	Provides notifications when places of interest are near	Service enabler
	31	Provides passengers with customised entertainment while driving	Convenience
	32	Helps manage daily activities	Convenience

Note: Break points for most, moderate and least preferred technologies are derived based on percentage of times a technology is rated the best. Sample size - [N= 1,246]

UK consumers trust traditional car manufacturers more to bring self-driving technology to market

Type of company consumers trust the most to bring fully self-driving technology to market



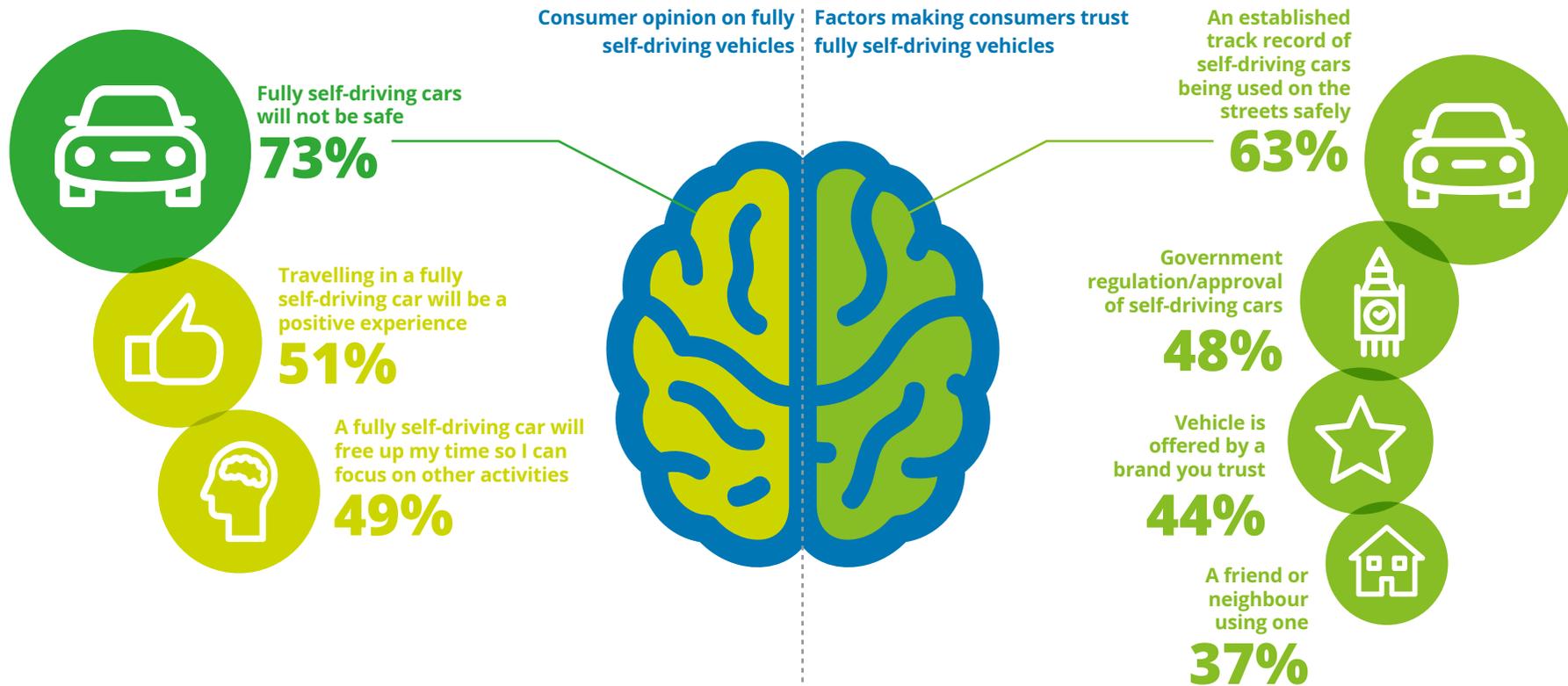
Sample size - [N= 1,251]

Source: 2016 and 2014 global automotive consumer survey, Deloitte.

What will make consumers trust self-driving cars?

59% don't want the government to allow self-driving cars in the next 5 years...

But 48% need to see government regulation or approval to feel safe in a fully self-driving car.



Note: Percentage of respondents who strongly agreed or agreed have been added together

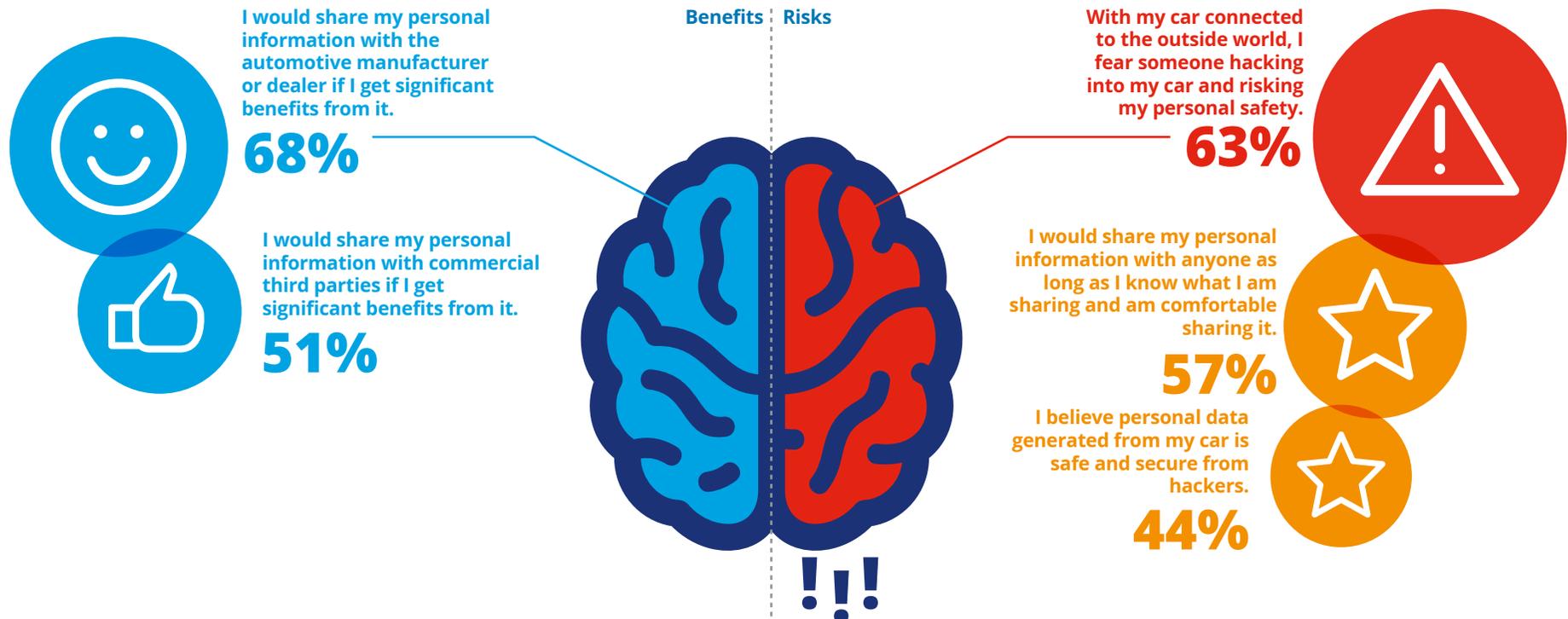
Note: Percentage of respondents who said 'significantly more likely' or 'more likely' have been added together

Sample size - [N= 1,089]

Source: 2016 and 2014 Global automotive consumer survey, Deloitte.

We fear our cars being hacked but we're willing to share our data for a benefit...

Consumer opinion on personal data sharing and privacy



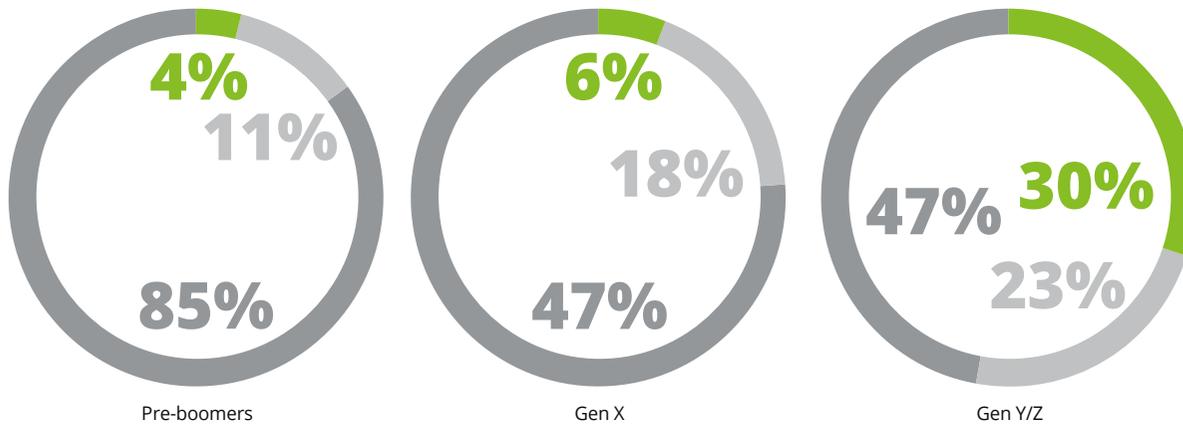
Note: Percentage of respondents who strongly agreed or agreed have been added together

Sample size – [N= 1,089]

Source: 2016 and 2014 Global automotive consumer survey, Deloitte.

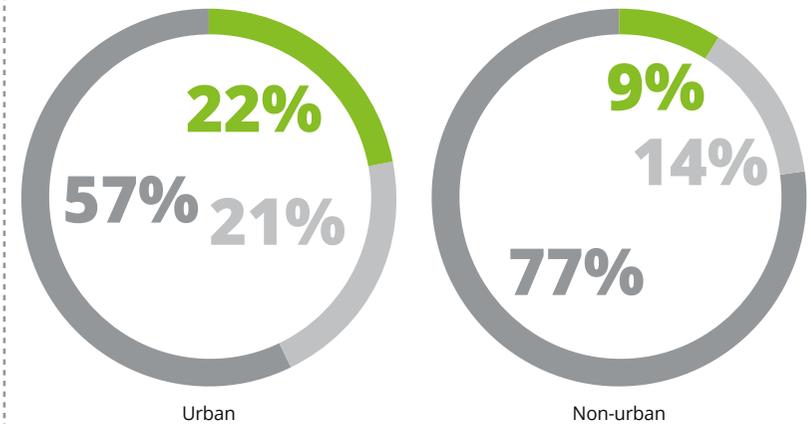
More than 8 out of 10 consumers in the United Kingdom never or rarely use ride-sharing* services...

Gen Y/Z consumer's use of ride-sharing services is five times that of Gen X consumers, and over seven times that of Pre/Boomers



■ At least once a week ■ Rarely ■ Never
 Sample sizes - [Pre/Boomers, N= 548; Gen X, N= 254; Gen Y/Z, N= 453]

Urban consumers' use of ride-hailing services is more than twice that of non-urban consumers



■ At least once a week ■ Rarely ■ Never
 Sample sizes - [Urban, N= 472; Non-urban, N= 783]

Ride-sharing frequency



■ At least once a week ■ Rarely ■ Never

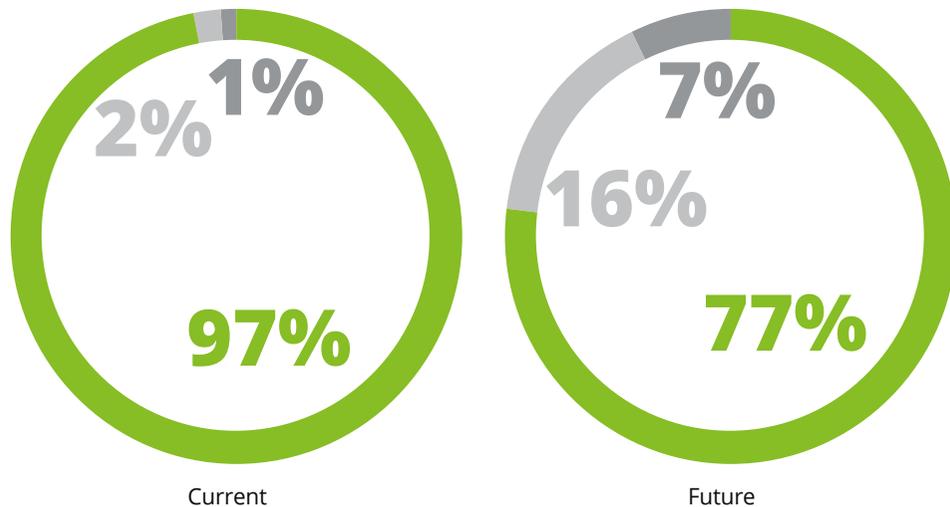
*Ride-sharing is defined in this study as car sharing services wherein consumers hire a car/driver via the phone, or an app.
 Sample size - [N= 1,255]

Source: 2016 and 2014 Global automotive consumer survey, Deloitte.

Consumers are willing to wait only an hour or two to fully charge a vehicle... but actual charging times are much longer

Hybrids most popular among older generations. People still prefer internal combustion engines because they do not want to wait to charge their cars.

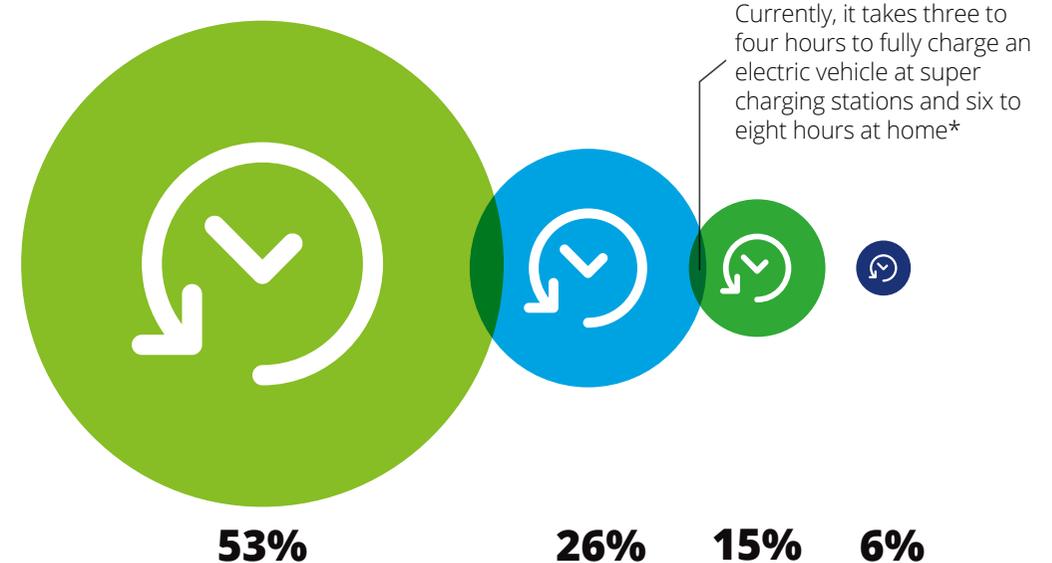
Engine preferences



■ Conventional engines (petrol/diesel) ■ Hybrid electric ■ Other alternative engines

Sample sizes for current engine preference- [Overall, N = 933; Pre boomers, N = 434; Gen X, N = 193; Gen Y/Z, N = 306]
 Sample sizes for future engine preference- [Overall, N = 949; Pre boomers, N = 395; Gen X, N = 185; Gen Y/Z, N = 369]

Percentage of consumers who will wait to fully charge an electric vehicle



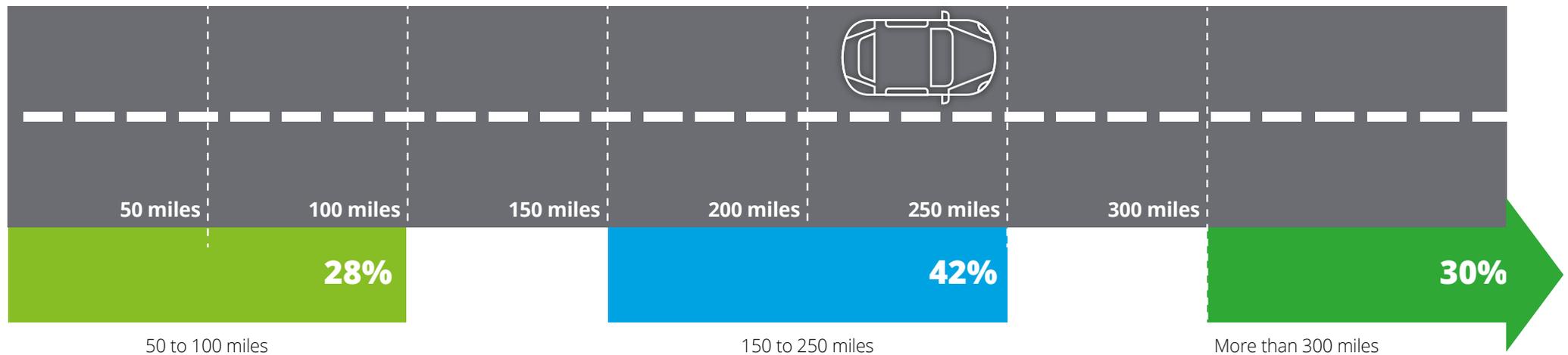
■ Up to 1 hour ■ 2 hours ■ 4 hours ■ 8 hours or more

Sample size - [N= 1,252]

*<http://www.ibtimes.co.uk/electric-cars-could-be-charged-just-15-minutes-using-new-intermediate-storage-system-1539999>

7 in 10 consumers want a minimum distance of 250 miles from a fully charged electric vehicle

Percentage of consumers, by minimum distance an electric vehicle can drive on a full charge

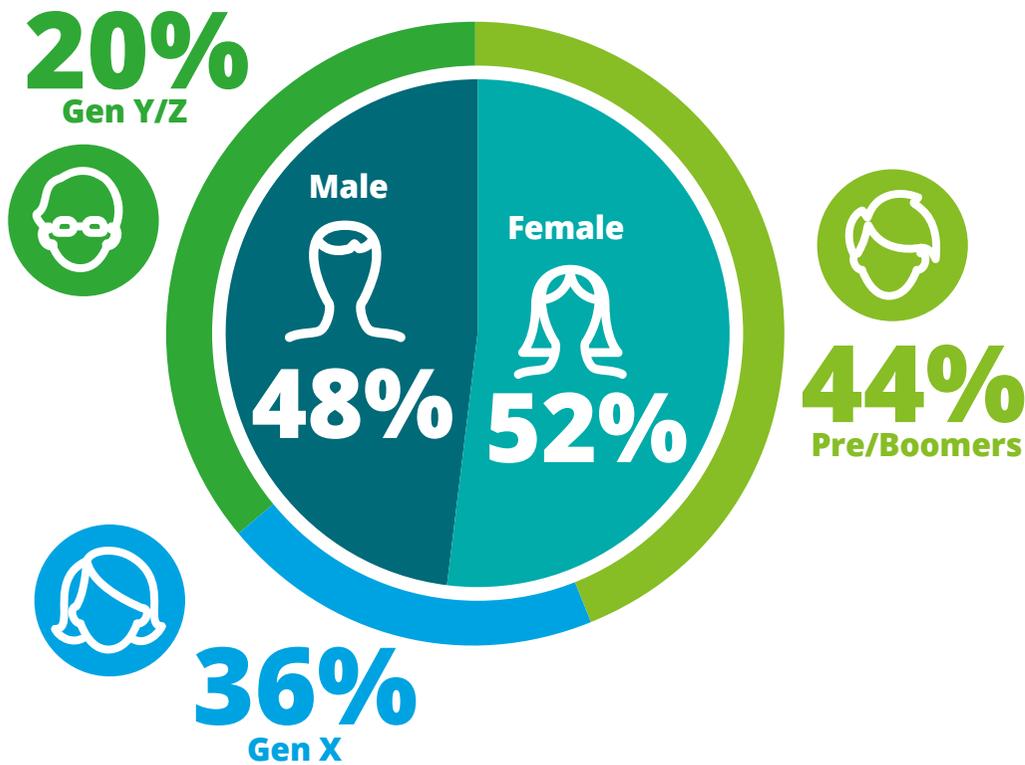


Sample size - [N= 1,253]

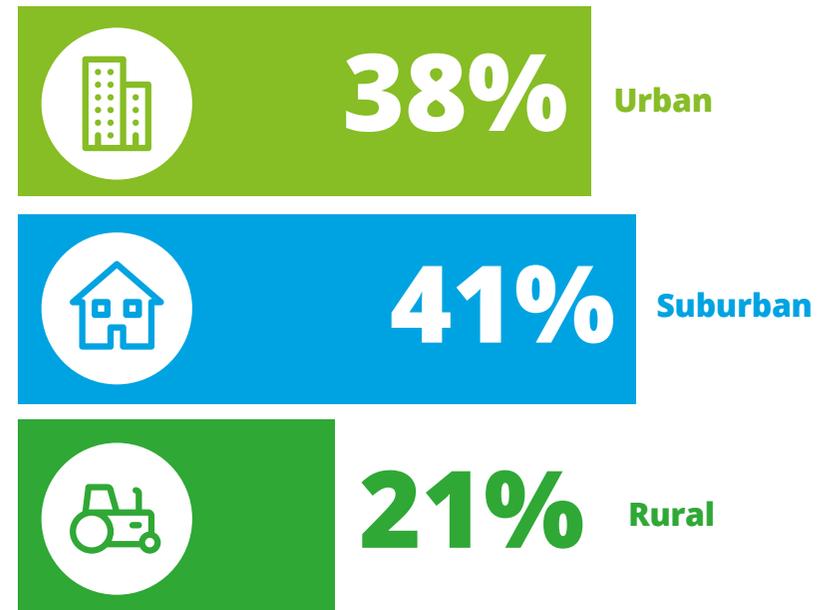
Source: 2016 and 2014 Global automotive consumer survey, Deloitte.

UK demographics

Generational segments and gender (%)



Where respondents reside (%)

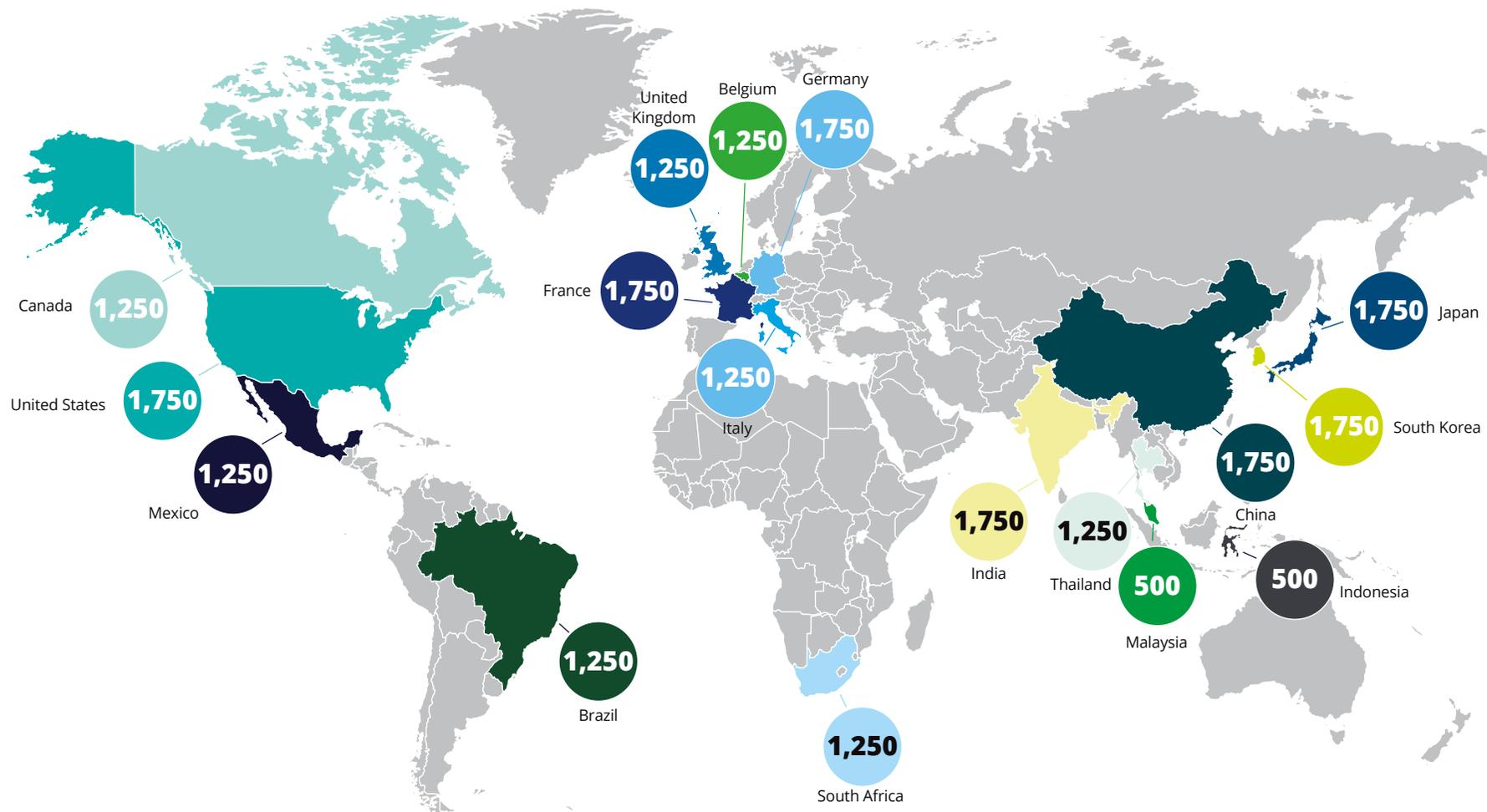


Note: Pre/Boomers: Born Before 1965; Gen X: Born Between 1965-1976; Gen Y/Z: Born After 1976 (sample excludes consumers under 16 years of age)

Sample size - [N= 1,255]

Source: 2016 and 2014 Global automotive consumer survey, Deloitte.

The Global Automotive Consumer Study surveyed over 22,000 consumers in 17 countries around the world



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