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What's ahead for fully autonomous driving

Consumer opinions on advanced vehicle technology

Deloitte Global Automotive Consumer Study

January 2017

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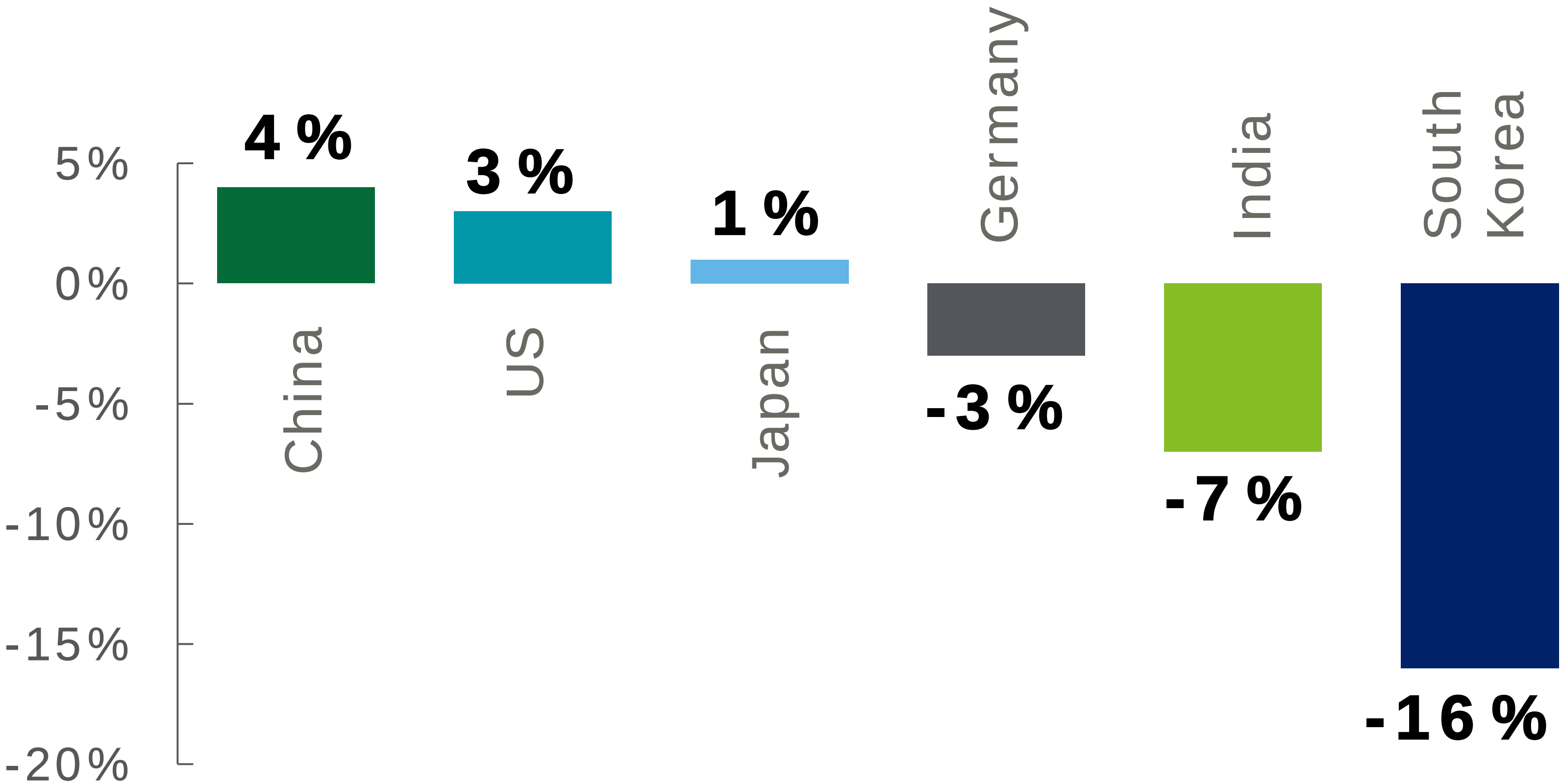
Change in desirability for fully autonomous vehicles since 2014



Source: Global Automotive Consumer Study

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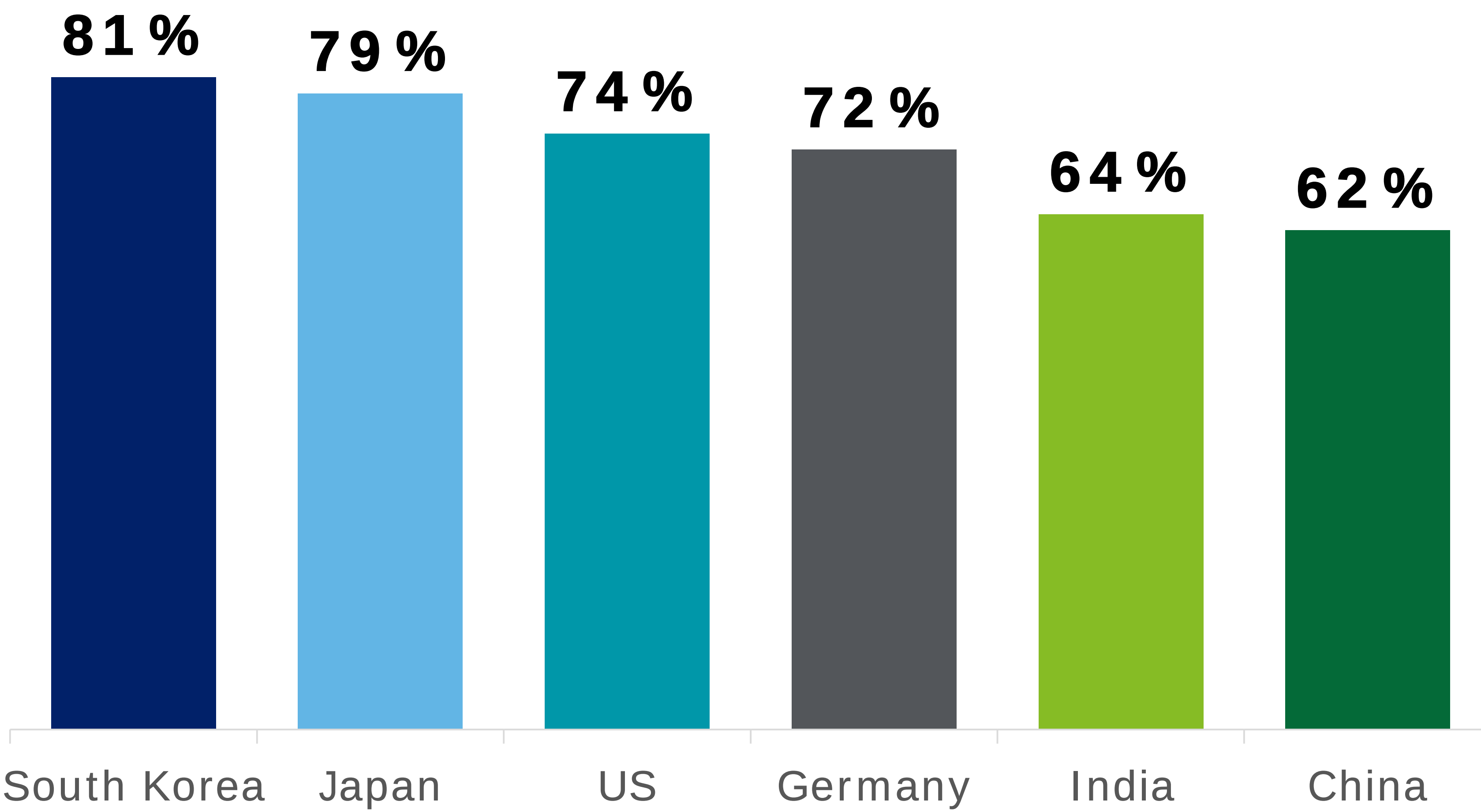
Percentage of consumers who feel fully autonomous vehicles will ***NOT*** be safe



Source: Global Automotive Consumer Study

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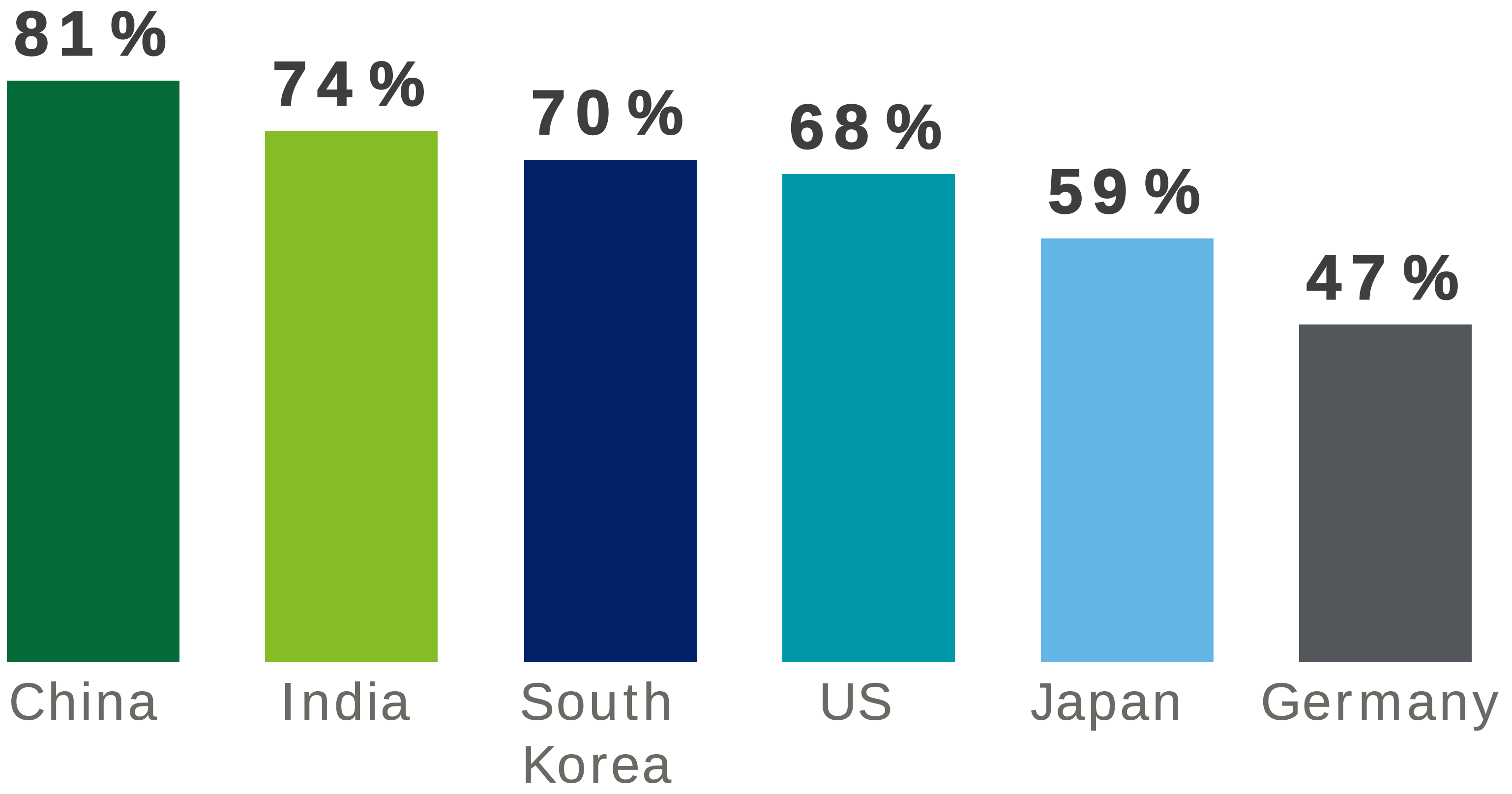
Percentage of consumers who feel an established track record of fully autonomous cars being safely used would make them more likely to ride in one



Source: Global Automotive Consumer Study

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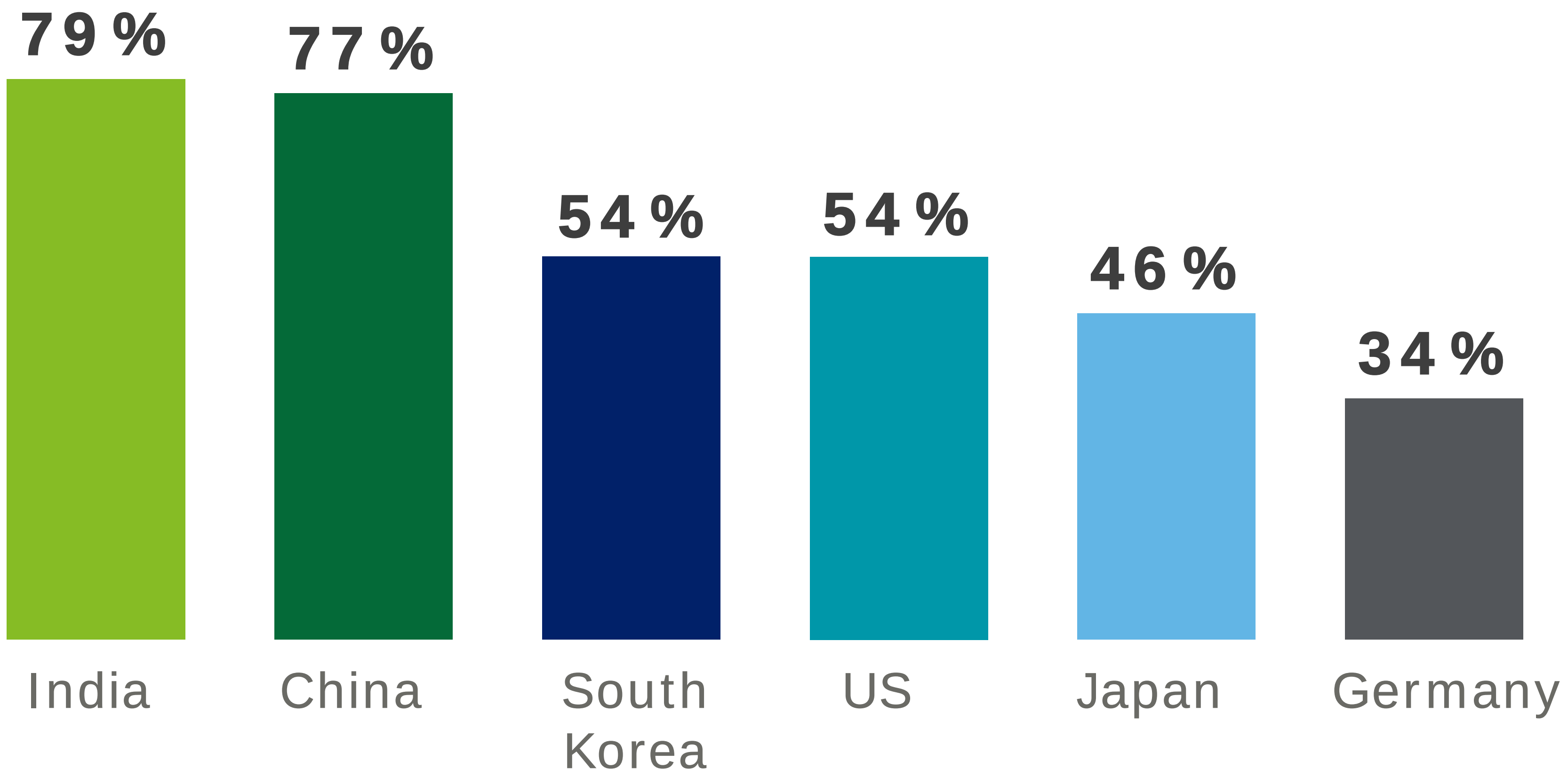
Percentage of consumers who feel they would be more likely to ride in a fully autonomous vehicle if it were offered by a brand they trust



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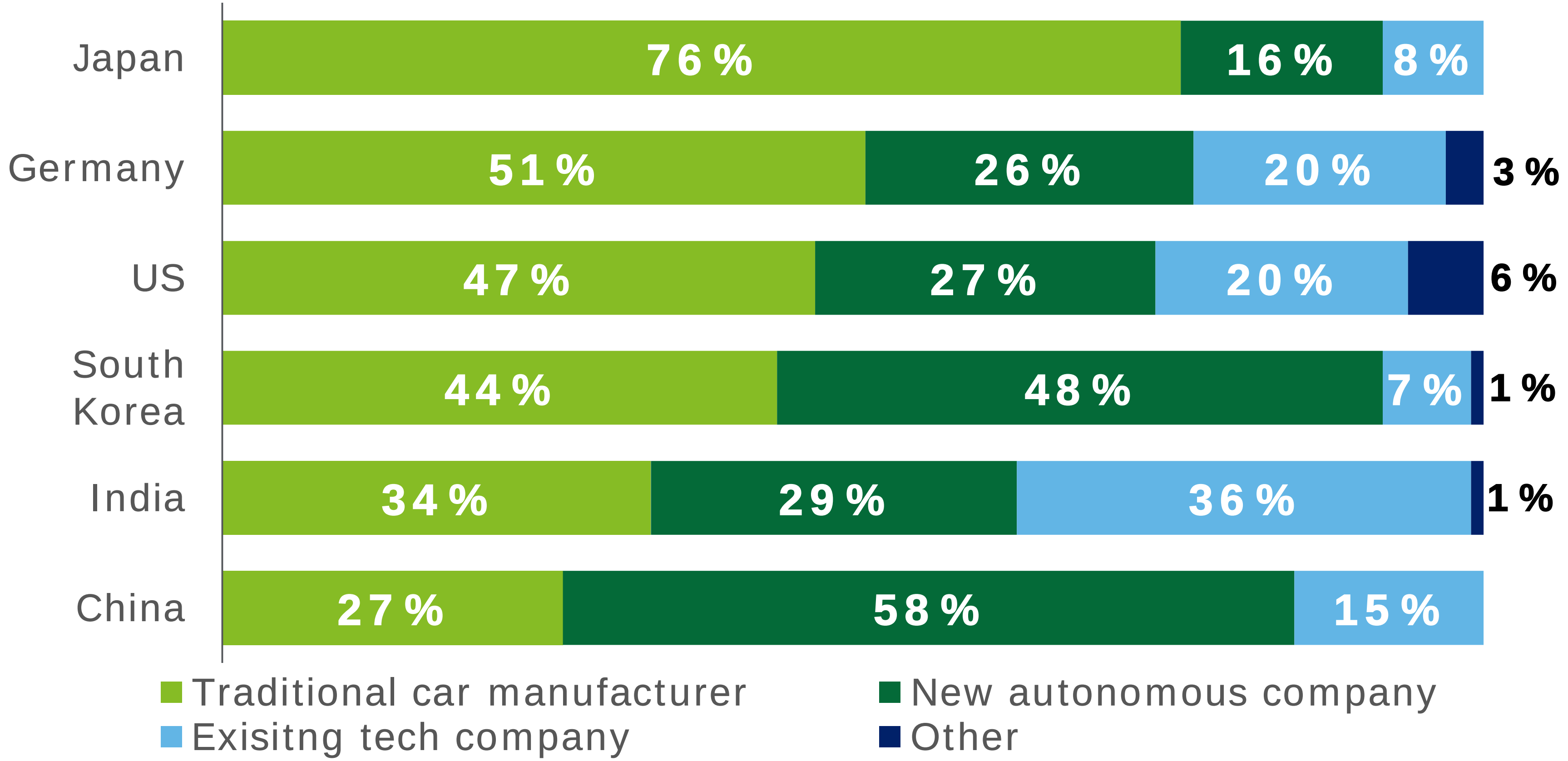
Types of companies consumers trust most to bring fully autonomous vehicles to market



Source: Global Automotive Consumer Study

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Consumers' most and least preferred advanced automotive technologies

Description	Category	US	Germany	Japan	South Korea	China	India
Recognizes objects on road and avoids collision	Safety	1	1	1	2	1	1
Informs driver of dangerous driving situations	Safety	2	3	4	3	3	4
Blocks driver from dangerous driving situations	Safety	3	2	2	1	2	2
Takes steps in medical emergency or accident	Safety	4	4	3	4	4	3
Diagnoses and sends maintenance notifications	Connectivity	5	14	12	5	6	5
Enables remote shutdown of stolen vehicle	Cyber security	6	13	8	14	8	8
Helps enhance fuel efficiency	Fuel efficiency	7	5	6	11	12	7
Enables vehicles-to-vehicle and road communication	Connectivity	8	10	5	9	5	11
Prevents hacking into vehicle systems	Cyber security	9	15	19	17	22	13
Prevents theft by restricting unauthorized access	Cyber security	10	7	16	20	18	10
Enables use of advanced lightweight materials	Fuel efficiency	11	11	14	12	7	12
Enables interactive vehicle operational information	Convenience	12	16	18	19	20	17
Enables usage of alternative fuels	Environment	13	6	9	6	11	6
Automates tasks for comfort and convenience	Convenience	14	12	10	7	9	14
Lowers the impact on the environment	Environment	15	8	15	13	16	9
Enables hands-free interior controls	Convenience	16	23	26	30	29	24
Monitors the physical health of the driver	Safety	17	9	13	16	13	15
Enables high-speed, long-distance, highway "auto-pilot" mode	Self-drive	18	17	11	8	15	19
Enables remote/automatic software updates of the vehicle	Connectivity	19	25	24	21	31	22
Allows use of smartphone applications through the vehicle dashboard	Connectivity	20	28	32	29	27	26
Enables full self-driving capabilities	Self-drive	21	20	7	10	14	20
Coaches the driver to drive safely	Cost efficiency	22	18	17	18	10	16
Makes available adjustable settings to enhance vehicle performance	Performance*	23	21	20	15	23	18
Assists in locating, reserving, and navigating to a parking space	Service enabler	24	19	25	25	17	21
Enables the use of self-healing paint	Miscellaneous	25	24	23	27	25	32
Provides passengers with customized entertainment while driving	Convenience	26	32	30	28	30	28
Provides notifications when places of interest are near	Service enabler	27	26	31	31	26	23
Automatically pays parking and toll fees	Service enabler	28	27	22	26	21	30
Empowers customer to personalize vehicles	Miscellaneous	29	30	28	22	28	27
Allows the driver to control automated home systems	Service enabler	30	29	29	24	24	29
Enables low-speed urban "auto pilot" mode	Self-drive	31	22	21	23	19	25
Helps manage daily activities	Convenience	32	31	27	32	32	31

Source: Global Automotive Consumer Study

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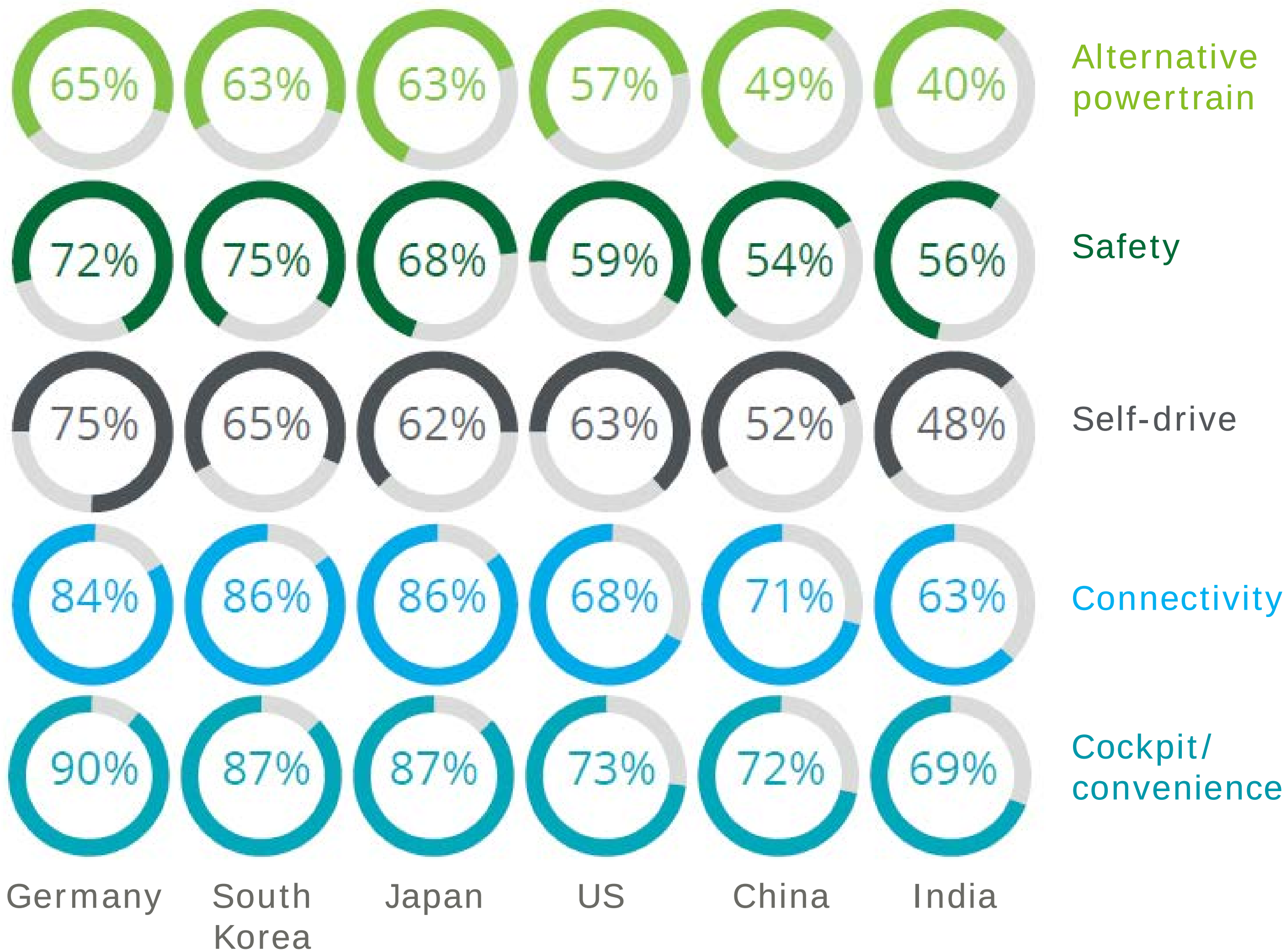
Percentage of consumers who are ***NOT*** willing to pay more than $500 for various advanced vehicle technologies



Source: Global Automotive Consumer Study

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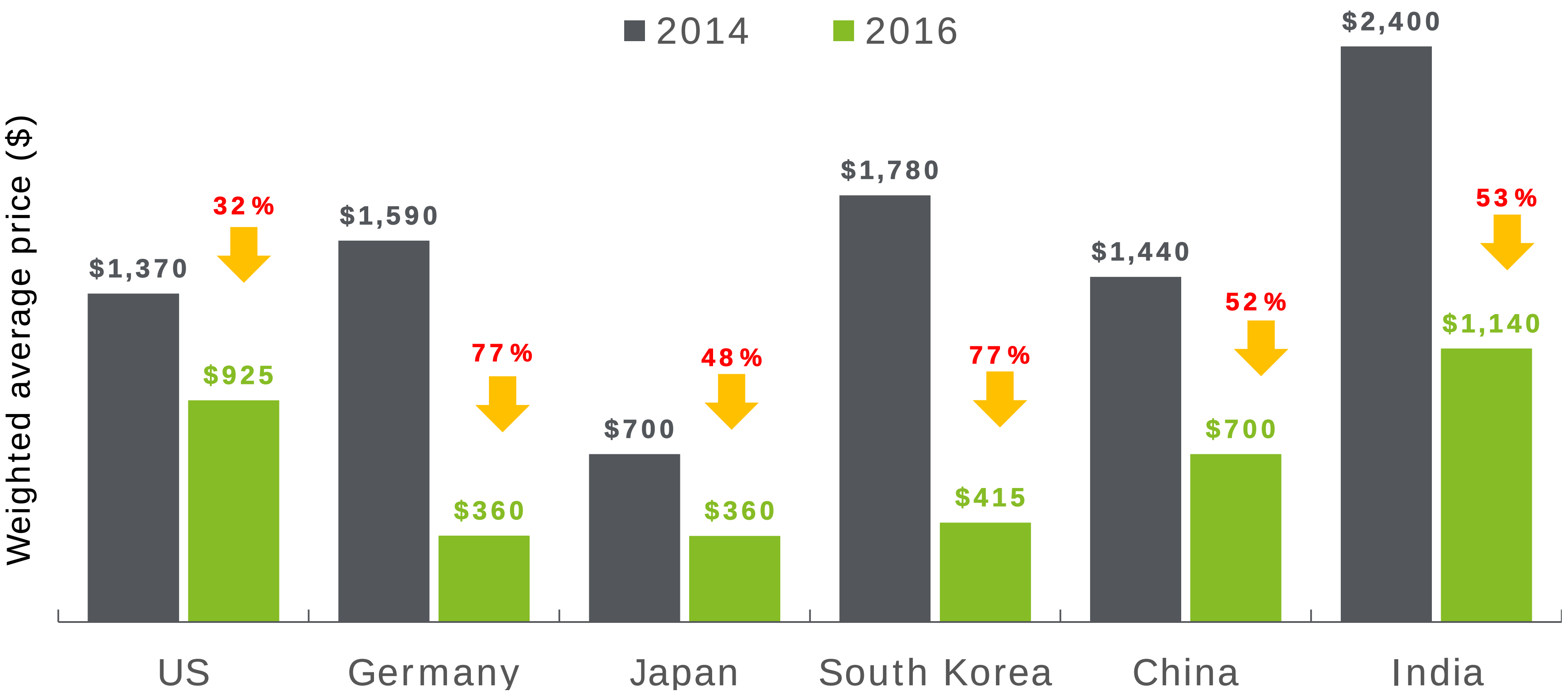
Overall expected price which consumers are willing to pay for advanced automotive technologies (2014 and 2016)



The $ value for each country represents the average of overall weighted prices across the five technology categories, that is, safety, connectivity, cockpit/convenience, self-drive, and alternative engines. The non-USD currency has been converted into USD by using the average exchange rates in 2016

Source: Global Automotive Consumer Study

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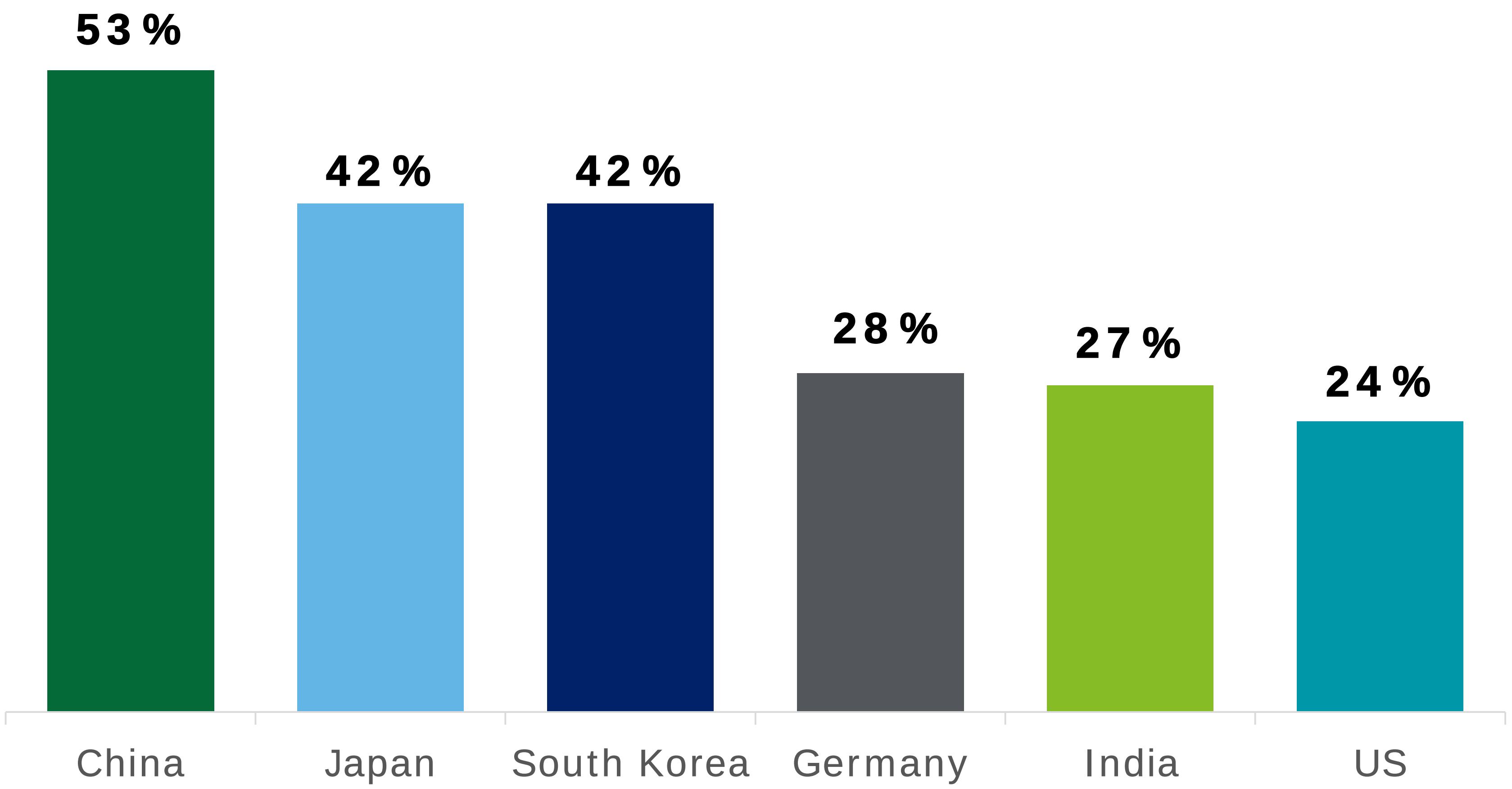
Percentage of consumers who would prefer a hybrid-electric, battery-electric or other form of alternative powertrain in their next vehicle



Source: Global Automotive Consumer Study

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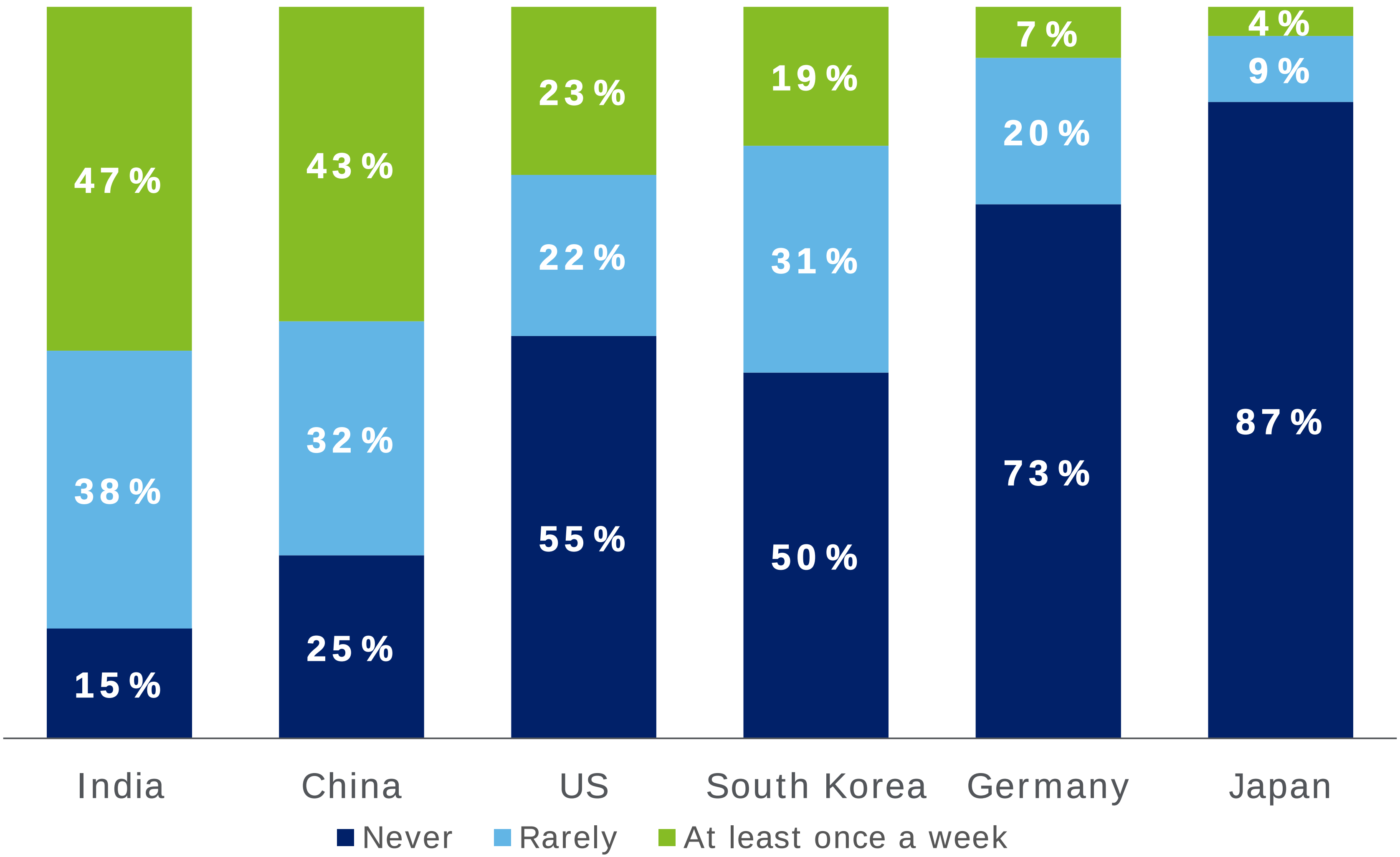
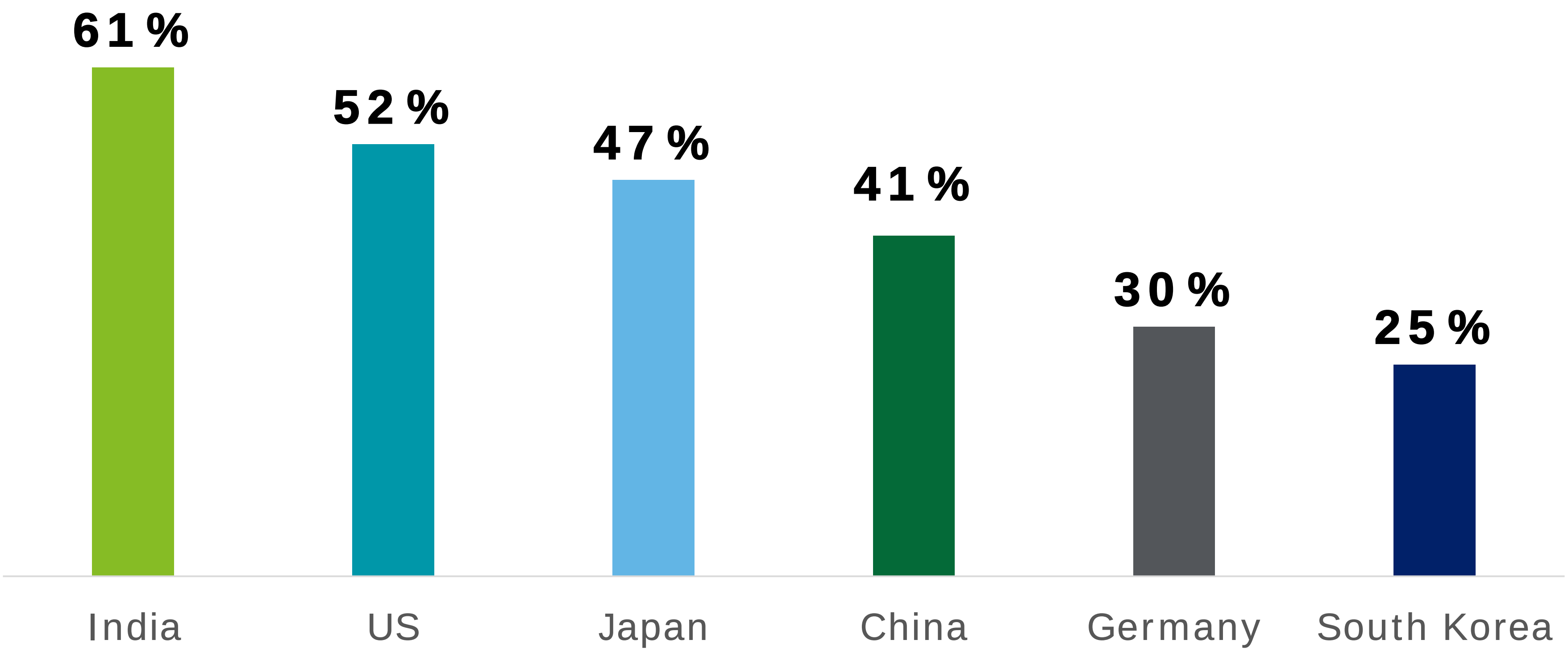
Frequency that consumers use ride-hailing services, by country



Source: Global Automotive Consumer Study

Percentage of consumers who use ride-hailing services and question their need to own a vehicle in the future



Source: Global Automotive Consumer Study

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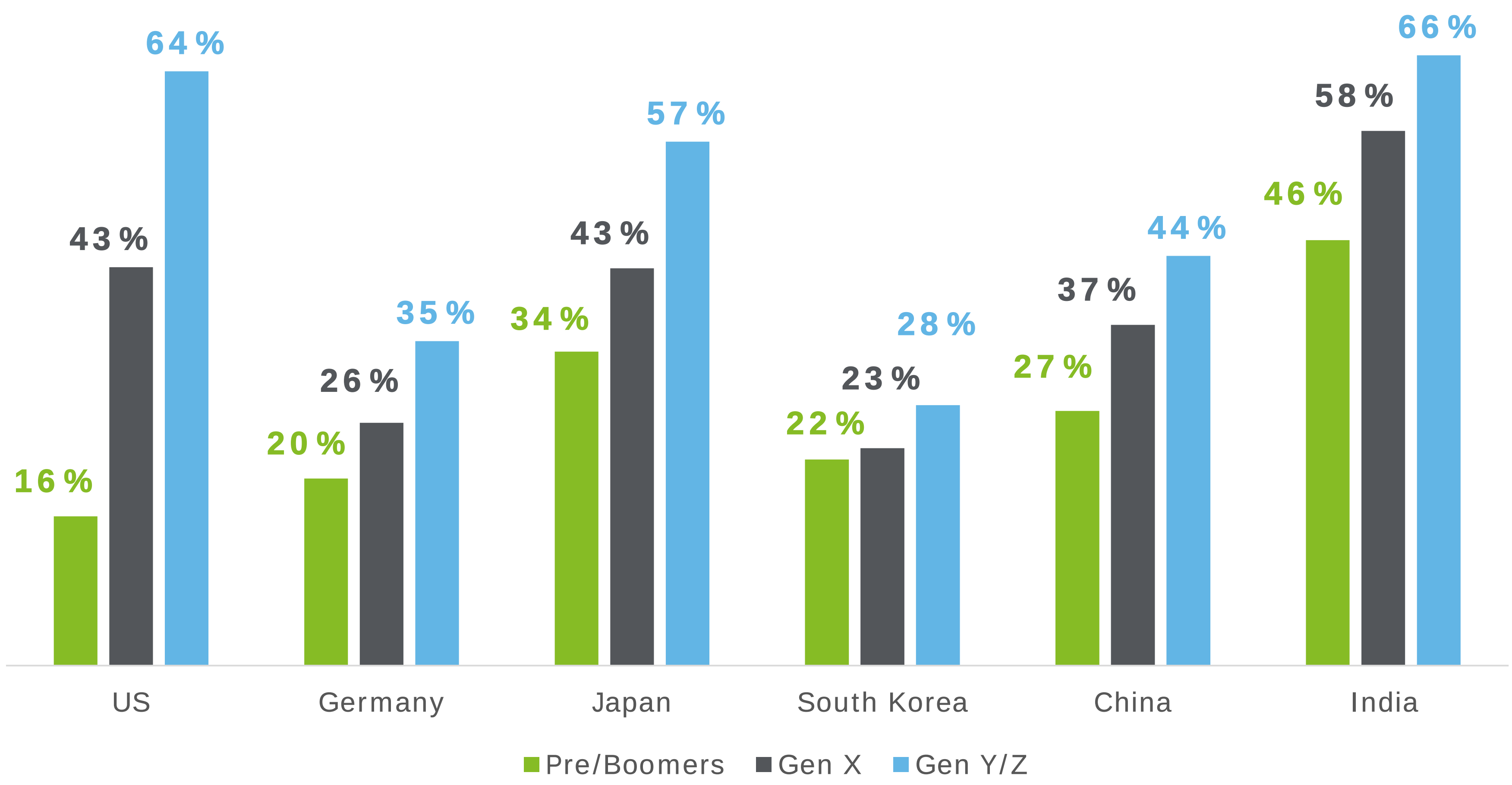
Percentage of consumers who use ride-hailing services and question their need to own a vehicle in the future, by generation



Source: Global Automotive Consumer Study

About the Global Automotive Consumer Study

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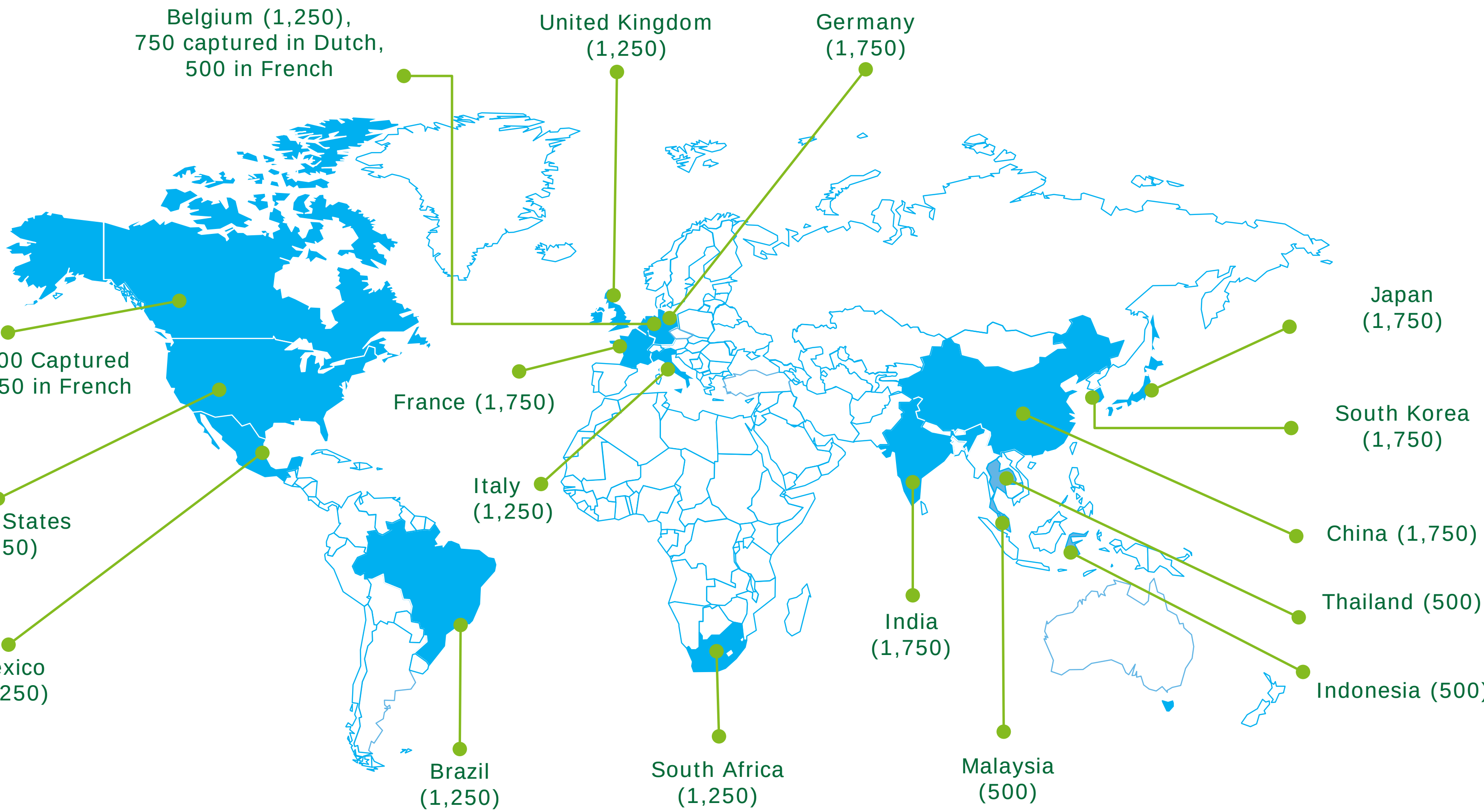
The Global Automotive Consumer Study surveyed over 22,000 consumers in 17 countries around the world



Source: Global Automotive Consumer Study

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